Streamlining Ticket Assignment for Efficient Support Operations

Problem statement:

In many support organizations, ticket assignment is often handled manually or through rigid rules. This process leads to inefficiencies such as delayed response times, uneven workload distribution among agents, and lack of transparency in ticket ownership. As the volume of support requests increases, manual assignment becomes error-prone, resulting in lower customer satisfaction and higher operational costs.

There is a need for a streamlined, intelligent ticket assignment system that can automatically categorize, prioritize, and route tickets to the most suitable agents based on factors such as expertise, availability, workload, and service-level agreements (SLAs). Such a system should reduce manual intervention, optimize resource utilization, and enhance the overall efficiency of support operations while ensuring timely resolution for customers.

SKILLS:

- Portal login & navigation
- User, group, and role handling
- Ticket management
- Workflow design

OBJECTIVE:

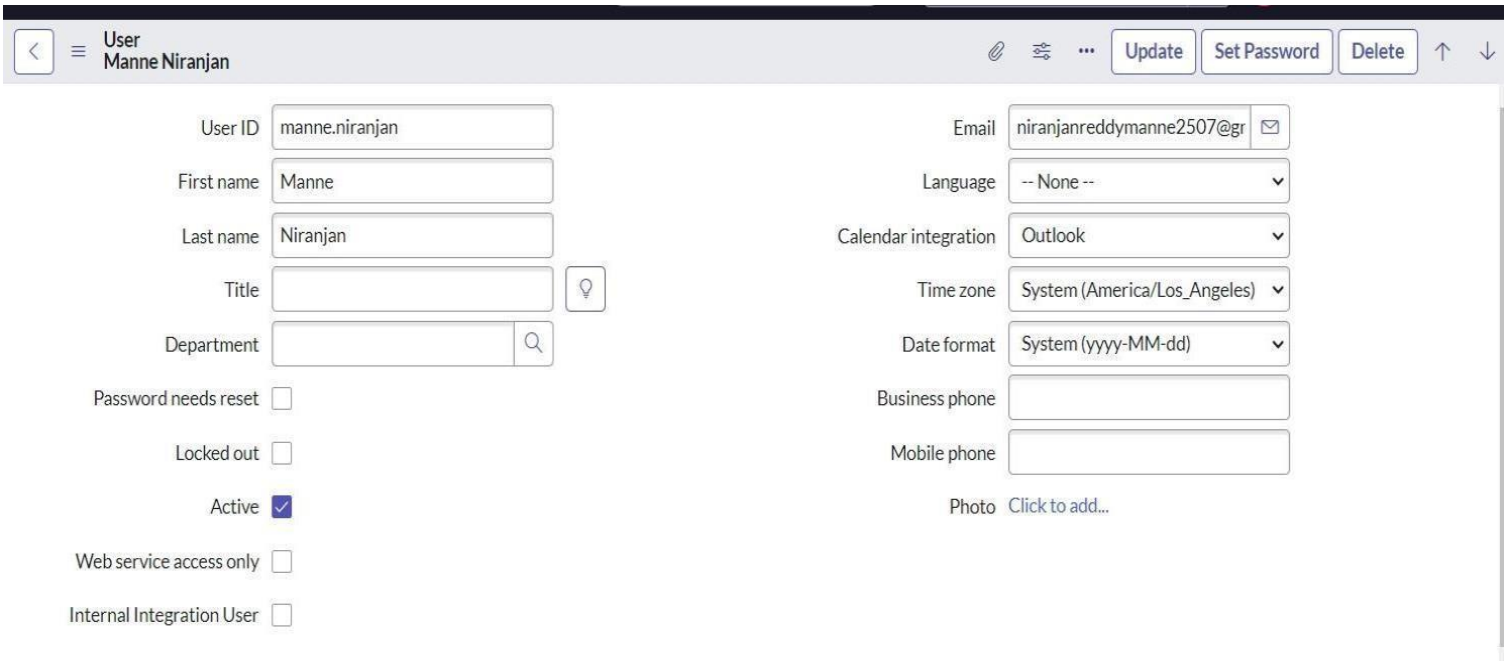
The objective is to automate ticket assignment in order to minimize manual effort and ensure a fair distribution of workload among support agents. By intelligently matching tickets with agents based on their expertise and availability, the process will help reduce response and resolution times for customer issues. This approach aims to improve transparency and accountability in ticket ownership, while enhancing overall customer satisfaction and operational efficiency.

TASK INITIATION:

Milestone 1: Users

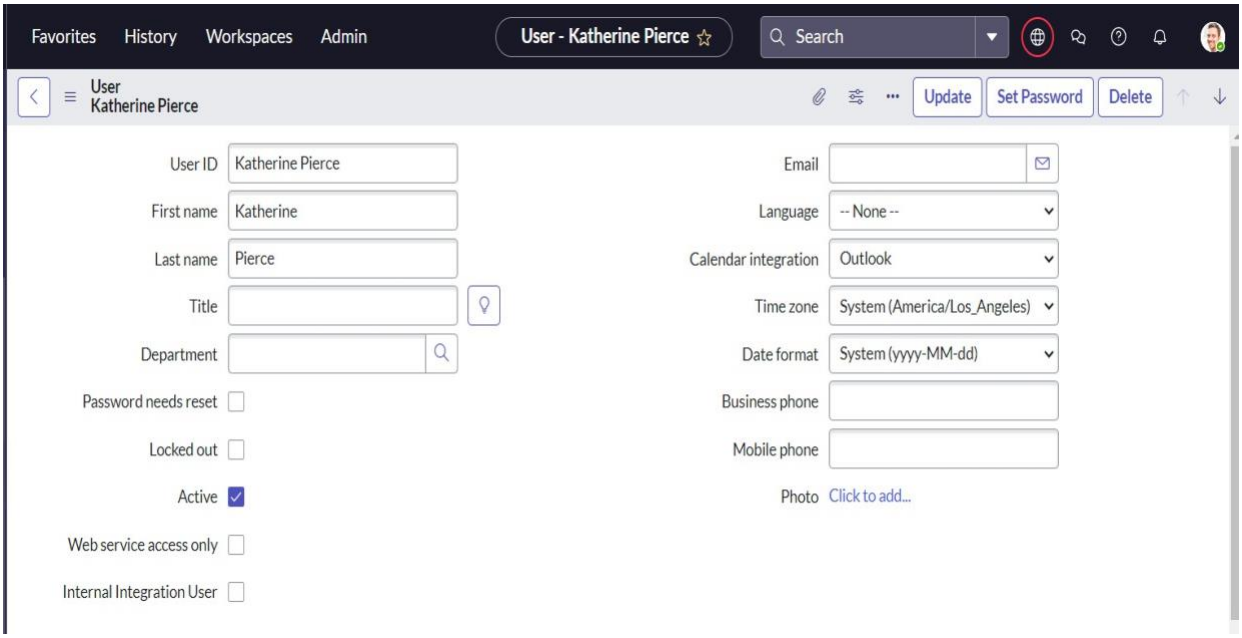
Activity 1: Create Users

1. Open service now.
2. Click on All >> search for users
3. Select Users under system security
4. Fill the following details to create a new user



5. Click on submit
6. Create one more use

7. Create another user with the following details

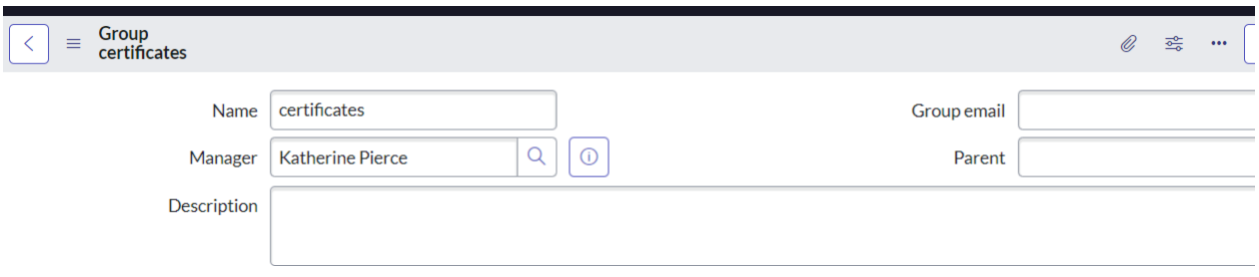


8. Click on submit

Milestone 2: Groups

Activity 1: Create Groups

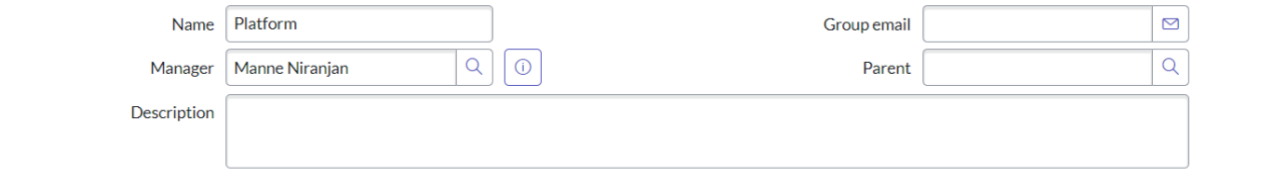
1. Open service now.
2. Click on All >> search for groups
3. Select groups under system security
4. Click on new
5. Fill the following details to create a new group



6. Click on submit

Create one more group:

1. Create another group with the following details

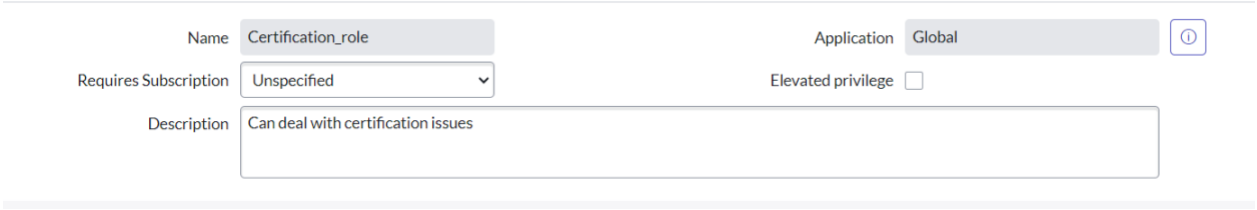


2. Click on submit

Milestone 3: Roles

Activity 1: Create Roles

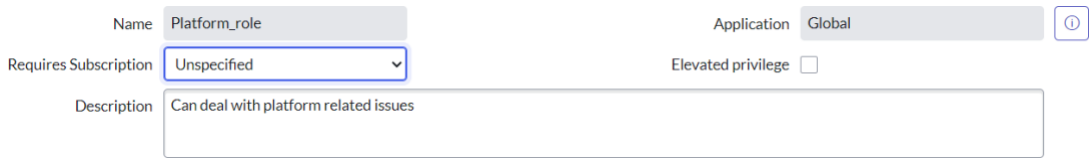
1. Open service now.
2. Click on All >> search for roles
3. Select roles under system security
4. Click on new
5. Fill the following details to create a new role



6. Click on submit

Create one more role:

1. Create another role with the following details



2. Click on submit

Milestone 4: Tables

Activity 1: Create Tables

1. Open service now.
2. Click on All >> search for tables
3. Select tables under system definition
4. Click on new
5. Fill the following details to create a new table
   Label : Operations related
   Check the boxes Create module & Create mobile module
6. Under new menu name : Operations related
7. Under table columns give the columns

Column label	Type	Reference	Max length	Default value	Display
Created by	String	(empty)	40		false
Created	Date/Time	(empty)	40		false
Sys ID	Sys ID (GUID)	(empty)	32		false
Updates	Integer	(empty)	40		false
Updated by	String	(empty)	40		false
Updated	Date/Time	(empty)	40		false
Assigned to group	Reference	Group	40		false
Assigned to user	Reference	User	32		false
Comment	String	(empty)	40		false
Issue	String	(empty)	40		false
Name	String	(empty)	40		false
Priority	String	(empty)	40		false
Service request No	String	(empty)	40	javascript:getNextObjNumberPadded();	false
Ticket raised Date	Date/Time	(empty)	40		false
Insert a new row...					

8. Click on submit

Create choices for the issue filed by using form design
Choices are

1. unable to login to platform
2. 404 error
3. regarding certificates
4. regarding user expired

Milestone 5: Assign roles s User to groups

Activity 1: Assign roles & users to certificate group

1. Open service now.
2. Click on All >> search for tables
3. Select tables under system definition
4. Select the certificates group
5. Under group members
6. Click on edit
7. Select Katherine Pierce and save
8. Click on roles
9. Select Certification_role and save

Activity 2: Assign roles & users to platform group

1. Open service now.
2. Click on All >> search for tables
3. Select tables under system definition
4. Select the platform group
5. Under group members
6. Click on edit
7. Select Manne Niranjan and save
8. Click on roles
9. Select Platform_role and save

Milestone 6: Assign roles to tables

Activity 1: Assign roles to tables

1. Open service now.
2. Click on All >> search for tables
3. Select operations related table
4. Click on the Application Access
5. Click on u_operations_related read operation
6. Click on the profile on top right side
7. Click on elevate role
8. Click on security admin and click on update
9. Under Requires role
10. Double click on insert a new row
11. Give platform role
12. And add certificate role

13. Click on update

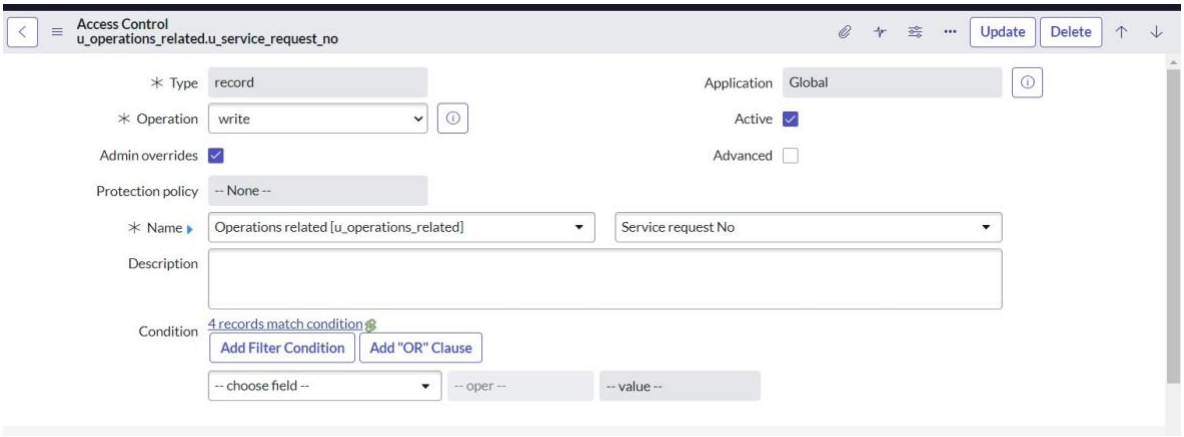
14. Click on u_operations_related write operation
15. Under Requires role
16. Double click on insert a new row
17. Give platform role
18. And add certificate role

Milestone 7: Create ACL

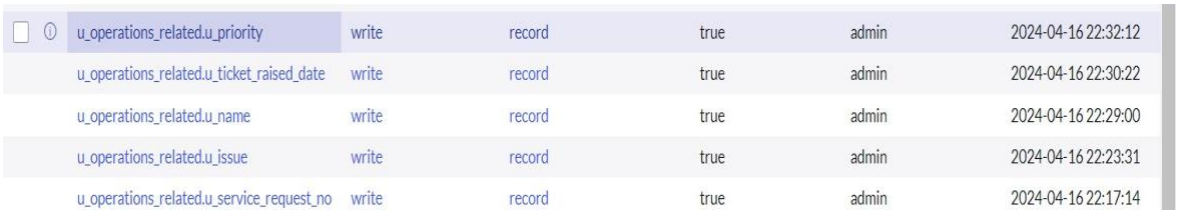
Activity 1: Create ACL

1. Open service now.
2. Click on All >> search for ACL
3. Select Access Control(ACL) under system security
4. Click on new

5. Fill the following details to create a new ACL



6. Scroll down under requires role
7. Double click on insert a new row
8. Give admin role
9. Click on submit
10. Similarly create 4 acl for the following fields

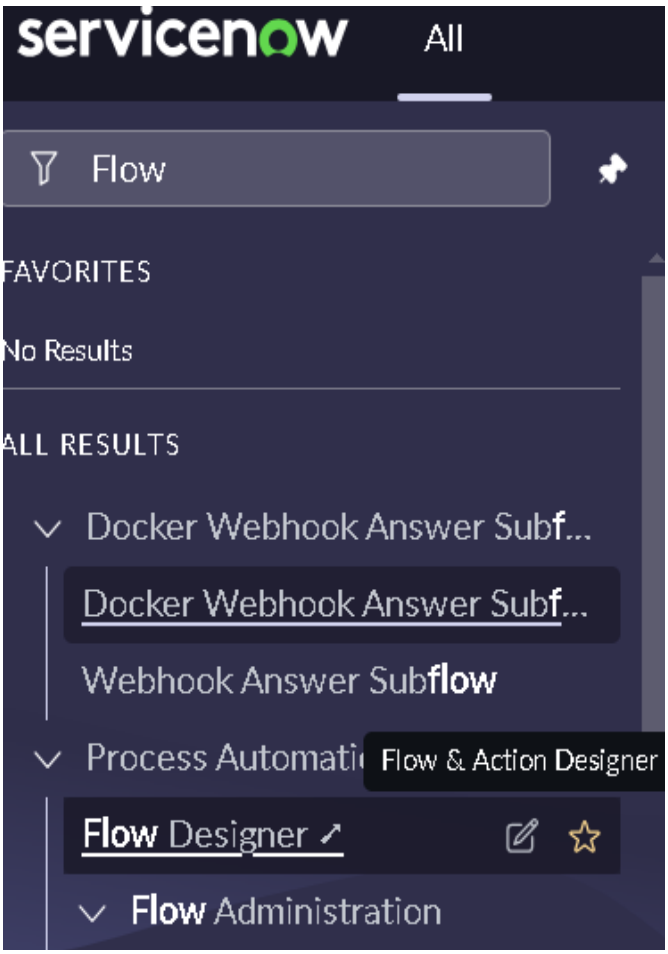


u_operations_related.u_priority	write	record	true	admin	2024-04-16 22:32:12
u_operations_related.u_ticket_raised_date	write	record	true	admin	2024-04-16 22:30:22
u_operations_related.u_name	write	record	true	admin	2024-04-16 22:29:00
u_operations_related.u_issue	write	record	true	admin	2024-04-16 22:23:31
u_operations_related.u_service_request_no	write	record	true	admin	2024-04-16 22:17:14

Milestone 8: Flow

Activity 1: Create a Flow to Assign operations ticket to group

1. Open service now.
2. Click on All >> search for Flow Designer
3. Click on Flow Designer under Process Automation.
4. After opening Flow Designer Click on new and select Flow.
5. Under Flow properties Give Flow Name as " Regarding Certificate".
6. Application should be Global.
7. Select Run user as " System user " from that choice.
8. Click on Submit.


servicenow
All
Flow
FAVORITES
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Docker Webhook Answer Subf...
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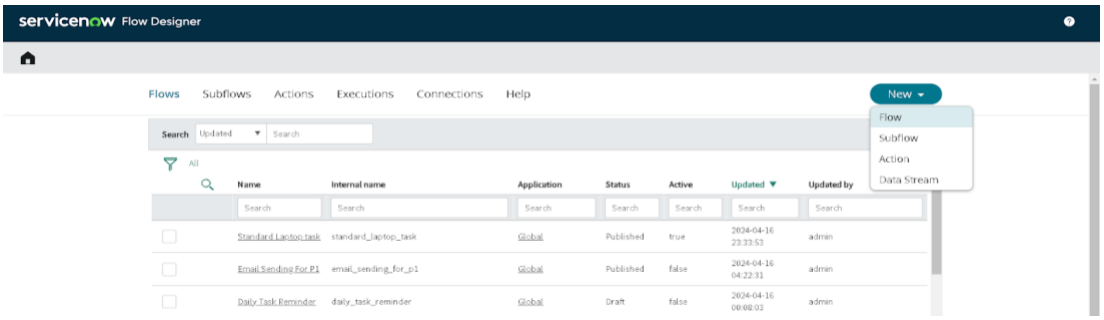
Flow Designer
Flow Administration


servicenow Flow Designer
Flows
Subflows
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Connections
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New
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Subflow
Action
Data Stream
Search
Updated
Name
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Standard Laptop task
standard_laptop_task
Global
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false
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Daily Task Reminder
daily_task_reminder
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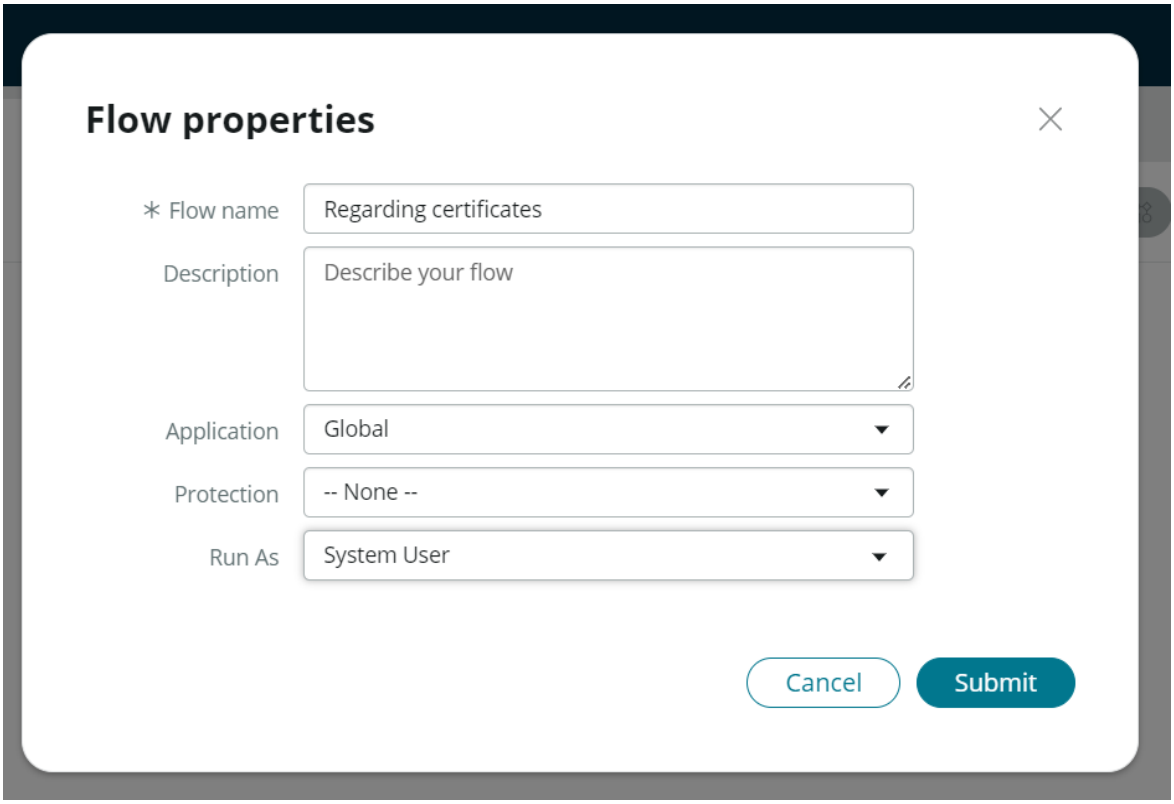
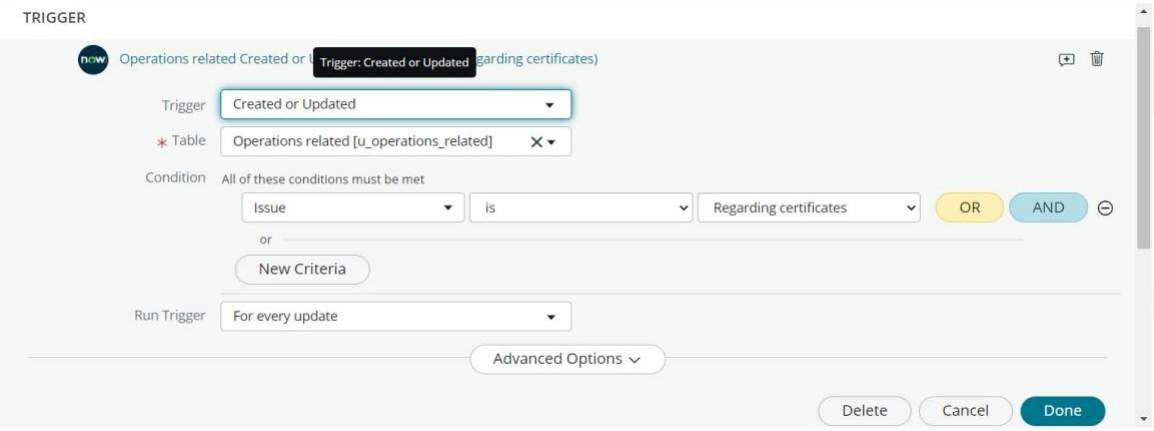
Draft
false
admin



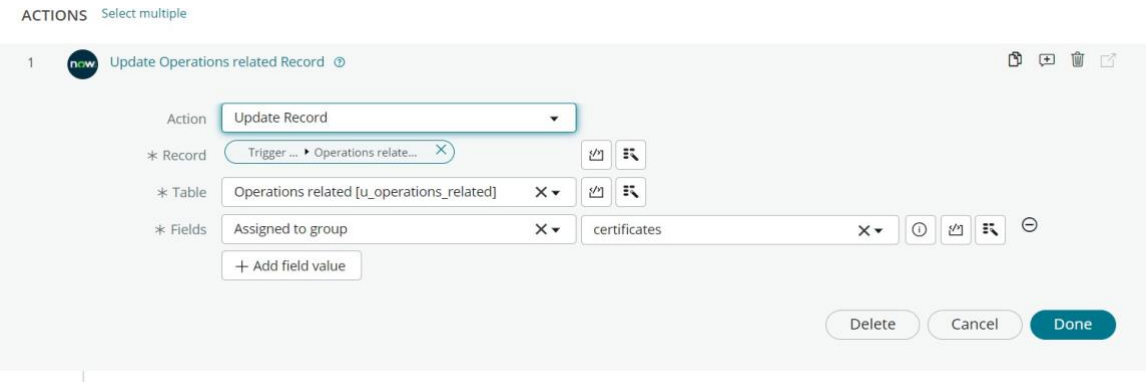
1. Click on Add a trigger
2. Select the trigger in that Search for "create or update a record" and select that.
3. Give the table name as " Operations related ".
4. Give the Condition as
   Field : issue

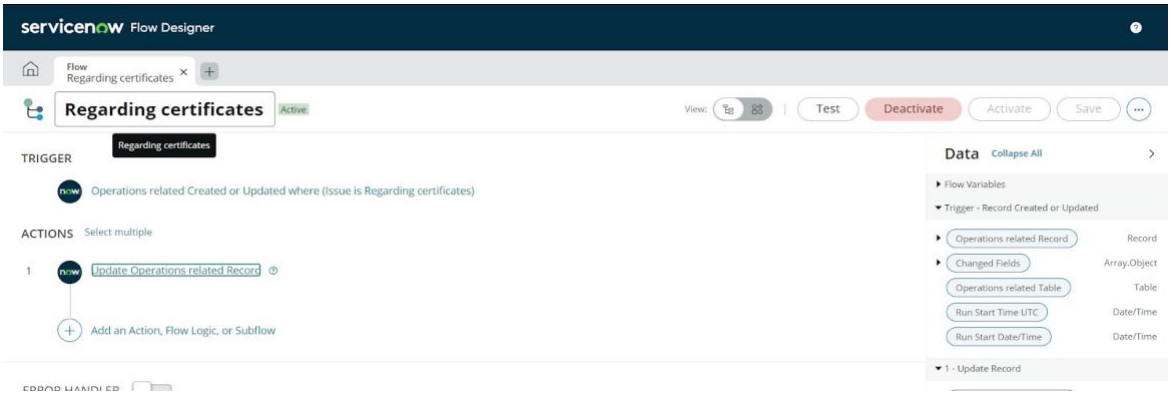
   Operator : is
   Value : Regrading Certificates

5. After that click on Done.



6. Now under Actions.
7. Click on Add an action.
8. Select action in that search for " Update Record ".
9. In Record field drag the fields from the data navigation from left side
10. Table will be auto assigned after that
11. Give the field as " Assigned to group "
12. Give value as " Certificates "
13. Click on Done.
14. Click on Save to save the Flow.
15. Click on Activate.





Activity 2: Create a Flow to Assign operations ticket to Platform group

1. Open service now.
2. Click on All >> search for Flow Designer
3. Click on Flow Designer under Process Automation.
4. After opening Flow Designer Click on new and select Flow.
5. Under Flow properties Give Flow Name as " Regarding Platform ".
6. Application should be Global.
7. Select Run user as " System user " from that choice.
8. Click on Submit.

1. Click on Add a trigger
2. Select the trigger in that Search for "create or update a record" and select that.
3. Give the table name as " Operations related ".
4. Give the Condition as
   Field : issue

   Operator : is
   Value : Unable to login to platform

5. Click on New Criteria

Field : issue
   Operator : is
   Value : 404 Error

6. Click on New Criteria

Field : issue

Operator : is
Value : Regrading User expired

7. After that click on Done.
8. Now under Actions.
9. Click on Add an action.
10. Select action in that search for " Update Record ".
11. In Record field drag the fields from the data navigation from left side
12. Table will be auto assigned after that
13. Give the field as " Assigned to group ".
14. Give value as " Platform ".
15. Click on Done.
16. Click on Save to save the Flow.
17. Click on Activate.

Conclusion

The implementation of the automated ticket routing system at ABC Corporation has been a significant success. By leveraging the capabilities of ServiceNow, we have streamlined the process of assigning support tickets to the appropriate teams, addressing the challenges of manual routing, and ensuring timely resolution of issues.