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Team ID	LTVIP2025TMID20421
Project Name	Streamlining Ticket Assignment For Efficient Support Operations
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Maximum Marks	10 Marks

Streamlining Ticket Assignment For Efficient Support Operations

Milestone 1: Setting Up ServiceNow Instance:

- Sign up on developer.servicenow.com and create a developer account.
- Navigate to the Personal Developer Instance section and request a new instance.
- Fill out the required information and submit the request.
- Instance details (URL, username, password) will be sent via email.
- Log in to the instance using the provided credentials.
- The instance is ready for development and customization.

Milestone 2: Creating Users:

- Open ServiceNow by logging into your instance.
- In the left-hand navigation pane, click on "All" to expand the application list.
- In the filter search bar, type "Users" and select "Users" under the System Security module.
- Click on the "New" button to begin creating a new user.
- In the form that appears, fill in the necessary details such as User ID, First Name, Last Name, and Email.

- After completing the form, click on "Submit" to save the new user.
- To create another user, click on the "New" button again.
- Enter the required information for the second user in the same manner.

The screenshot shows the 'User - Katherine Pierce' form in the ServiceNow interface. The top navigation bar includes 'Favorites', 'History', 'Workspaces', and 'Admin'. The title bar says 'User - Katherine Pierce'. The main form fields include:

- User ID: Katherine Pierce
- First name: Katherine
- Last name: Pierce
- Title: (empty)
- Department: (empty)
- Email: (empty)
- Language: -- None --
- Calendar integration: Outlook
- Time zone: System (America/Los_Angeles)
- Date format: System (yyyy-MM-dd)
- Business phone: (empty)
- Mobile phone: (empty)
- Photo: Click to add...
- Active: checked
- Password needs reset: unchecked
- Locked out: unchecked
- Web service access only: unchecked
- Internal Integration User: unchecked

- Once all fields are filled, click on "Submit" to add the second user to the system.

Milestone 3: Creating Groups:

- Open ServiceNow by logging into your instance.
- Click on "All" in the left-hand navigation panel to expand the application menu.
- In the filter search bar, type "Groups" and select "Groups" under the System Security module.
- Click on the "New" button to create a new group.
- In the form that appears, fill in the required details such as the Group Name and Description.

The screenshot shows the 'Group - certificates' form in the ServiceNow interface. The top navigation bar includes 'Favorites', 'History', 'Workspaces', and 'Admin'. The title bar says 'Group - certificates'. The main form fields include:

- Name: certificates
- Manager: Katherine Pierce
- Description: (empty)
- Group email: (empty)
- Parent: (empty)

- Once the details are entered, click on "Submit" to save the group.
- To create another group, click on the "New" button again.
- Fill in the necessary details for the second group, just as you did for the first one.

The screenshot shows the 'Group - Platform' form in the ServiceNow interface. The top navigation bar includes 'Favorites', 'History', 'Workspaces', and 'Admin'. The title bar says 'Group - Platform'. The main form fields include:

- Name: Platform
- Manager: Manne Niranjan
- Description: (empty)
- Group email: (empty)
- Parent: (empty)

- After completing the form, click on "Submit" to save the second group.

Milestone 4: Creating Roles:

- Open ServiceNow by logging into your instance.
- Click on "All" in the left-hand navigation pane to expand the application modules.
- In the filter search bar, type "Roles" and select "Roles" under the System Security section.
- Click on the "New" button to begin creating a new role.
- In the form that appears, fill in the necessary details such as the Role Name and Description.

The screenshot shows a ServiceNow 'Roles' creation form. The 'Name' field is set to 'Certification_role'. The 'Application' dropdown is set to 'Global'. The 'Requires Subscription' dropdown is set to 'Unspecified'. The 'Elevated privilege' checkbox is unchecked. The 'Description' field contains the text 'Can deal with certification issues'.

- After entering all the required information, click on "Submit" to save the new role.
- To create another role, click on the "New" button once more.
- Enter the relevant details for the second role in the form provided.

The screenshot shows a ServiceNow 'Roles' creation form. The 'Name' field is set to 'Platform_role'. The 'Application' dropdown is set to 'Global'. The 'Requires Subscription' dropdown is set to 'Unspecified'. The 'Elevated privilege' checkbox is unchecked. The 'Description' field contains the text 'Can deal with platform related issues'.

- Once completed, click on "Submit" to save the second role.

Milestone 5: Creating Table:

- Open ServiceNow by logging into your instance.
- Click on "All" in the left-hand navigation pane to expand the application modules.
- In the filter search bar, type "Tables" and select "Tables" under the System Definition section.
- Click on the "New" button to begin creating a new table.
- In the form that appears, enter the Label as "Operations related".
- Check the boxes for "Create module" and "Create mobile module" to generate the respective modules automatically.
- Under the New Menu Name, enter "Operations related" to define where the module will appear.
- In the Table Columns section, define the required fields for your table.

Q	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
X	Assigned to group	Reference	Group	40		false
X	Assigned to user	Reference	User	32		false
X	Comment	String	(empty)	40		false
X	Issue	String	(empty)	40		false
X	Name	String	(empty)	40		false
X	Priority	String	(empty)	40		false
X	Service request No	String	(empty)	40	javascript:getNextObjNumberPadded();	false
X	Ticket raised Date	Date/Time	(empty)	40		false
+	Insert a new row...					

- After completing the form, click on "Submit" to save the table.
- **Create Choices for the Issue Field**

1. Open the newly created table using **Form Design**.
2. Locate the field labeled "**Issue**" or create a new field if it doesn't exist.
3. Change the field type to **Choice** to allow multiple options.
4. Add the following choices under this field:
 1. **Unable to login to platform**
 2. **404 error**
 3. **Regarding certificates**
 4. **Regarding user expired**
5. Save the form to apply the changes.

Milestone 6: Assign roles & users to groups:

Assign Roles & Users to Certificate Group

- Open ServiceNow and log into your instance.
- Click on "All" in the left-hand navigation panel to expand the application modules.
- In the filter search bar, type "Groups" and select "Groups" under the System Security section.
- From the list of available groups, select the group named "Certificates".
- Under the Group Members related list, click on the "Edit" button.
- In the user selection window, search for "Katherine Pierce", select her name, and click on "Save" to add her to the group.
- Next, navigate to the Roles related list within the same Certificates group form.
- Click on the "Edit" button under the Roles section.
- Search for "Certification_role", select it, and click "Save" to assign the role to the group.

Assign Roles & Users to Platform Group

- Open ServiceNow and log into your instance.
- Click on "All" in the left-hand navigation panel to expand the application modules.
- In the filter search bar, type "**Groups**" and select "**Groups**" under the **System Security** section.
- From the list of groups, select the group named "**Platform**".
- Scroll down to the **Group Members** related list and click on the "**Edit**" button.
- In the user selection window, search for "**Manne Nirjanan**", select the user, and click on "**Save**" to add them to the group.
- Now scroll to the **Roles** related list within the Platform group form and click on the "**Edit**" button.
- In the role selection window, search for "**Platform_role**", select the role, and click on "**Save**" to assign it to the group.

Milestone 7: Assign Role to Table:

- Open ServiceNow and log into your instance.
- Click on "All" in the left-hand navigation pane to expand the application menu.
- In the filter search bar, type "**Tables**" and select the "**Tables**" option under **System Definition**.
- From the list of tables, select the table named "**Operations related**".
- In the table record, scroll down and click on the "**Application Access**" tab.
- In the list of access controls, click on the **u_operations_related Read** operation to open its configuration.
- Now, click on the **profile icon** in the top-right corner of the screen.
- Select "**Elevate Role**" from the dropdown.
- Choose "**security_admin**" and click on "**Update**" to elevate your privileges.
- Back in the Read operation form, scroll down to the "**Requires role**" section.
- Double-click inside the field to insert a new row.
- Enter "**platform_role**" as the first role and "**certificate_role**" as the second role.
- Click on "**Update**" to save the changes to the Read access control.

- Now, return to the access list and click on the **u_operations_related Write** operation.
- In the **Requires role** section, double-click to insert new rows.
- Again, enter "**platform_role**" and "**certificate_role**" as required roles.
- Click on "**Update**" to save the Write access control.

Milestone 8: Create ACL (Access Control List):

- Open ServiceNow and log into your instance.
- Click on "All" in the left-hand navigation pane to expand the application modules.
- In the filter search bar, type "ACL" and select "Access Control (ACL)" under the System Security section.
- Click on the "New" button to create a new access control rule.
- In the form that appears, fill in the necessary details such as:
 - Type: record
 - Operation: read / write / create / delete (as applicable)
 - Name: Select the appropriate table, e.g., u_operations_related or its fields

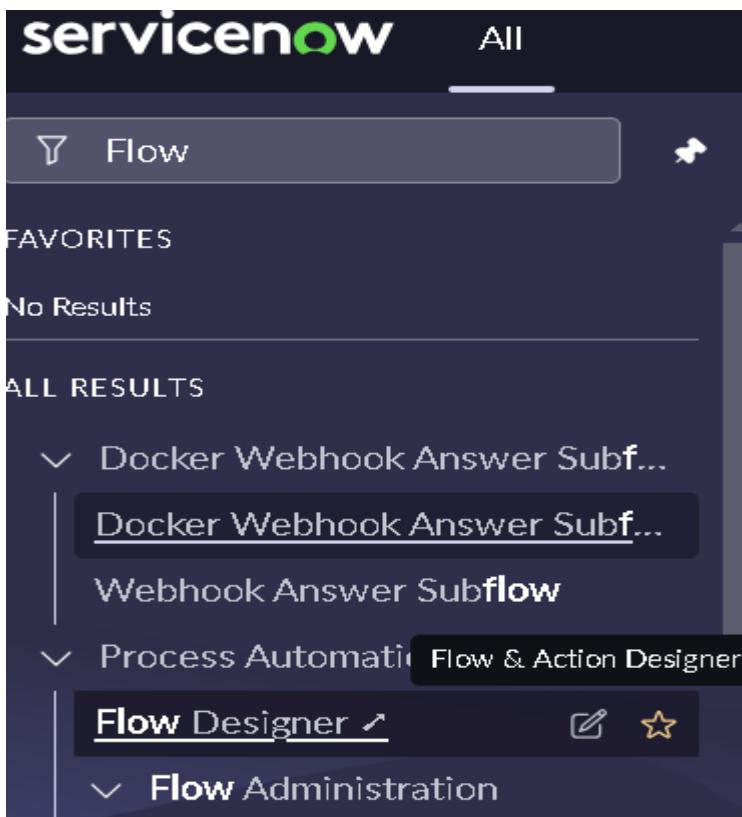
- Scroll down to the "Requires role" section.
- Double-click inside the empty field to insert a new row.
- Enter the role name admin to give administrative access.
- Click on "Submit" to save the ACL rule.

<input type="checkbox"/>	<input type="radio"/>	u_operations_related.u_priority	write	record	true	admin
		u_operations_related.u_ticket_raised_date	write	record	true	admin
		u_operations_related.u_name	write	record	true	admin
		u_operations_related.u_issue	write	record	true	admin
		u_operations_related.u_service_request_no	write	record	true	admin

Milestone 9: Creating A Flow:

Create a Flow to Assign Operations Ticket to Group:

- Open ServiceNow and log into your instance.
- Click on "All" in the left-hand navigation pane to expand the application modules.
- In the filter search bar, type "Flow Designer" and select "Flow Designer" under the Process Automation section.



- Once the Flow Designer opens, click on the "New" button and select "Flow" to create a new flow.

The screenshot shows the ServiceNow Flow Designer interface. At the top, there's a navigation bar with links for Flows, Subflows, Actions, Executions, Connections, and Help. A search bar is also present. On the right side, a 'New' button has a dropdown menu open, showing options: Flow, Subflow, Action, and Data Stream. Below the search bar, there's a table listing three existing flows:

Name	Internal name	Application	Status	Active	Updated	Updated by
Standard Laptop task	standard_laptop_task	Global	Published	true	2024-04-16 23:33:53	admin
Email Sending For P1	email_sending_for_p1	Global	Published	false	2024-04-16 04:22:31	admin
Daily Task Reminder	daily_task_reminder	Global	Draft	false	2024-04-16 00:08:03	admin

- Under the Flow Properties, enter the Flow Name as “Regarding Certificate”.
- Ensure the Application is set to Global.
- Set the Run As User to System User from the available choices.

The screenshot shows the 'Flow properties' dialog box. It contains the following fields:

- * Flow name: Regarding certificates
- Description: Describe your flow
- Application: Global
- Protection: -- None --
- Run As: System User

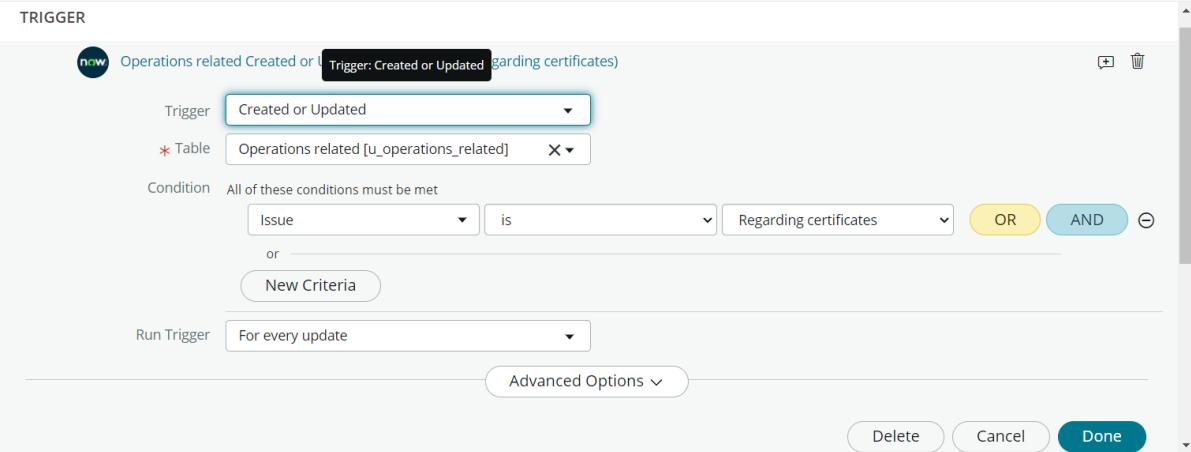
At the bottom right, there are 'Cancel' and 'Submit' buttons.

- Click on Submit to create the flow.

=>Add a Trigger

- Click on "Add a Trigger" to begin defining the event that will start the flow.
- In the trigger selection menu, search for "Create or Update Record" and select it.
- For the Table Name, choose “Operations related”.
- Set the Condition as follows:
 - Field: Issue

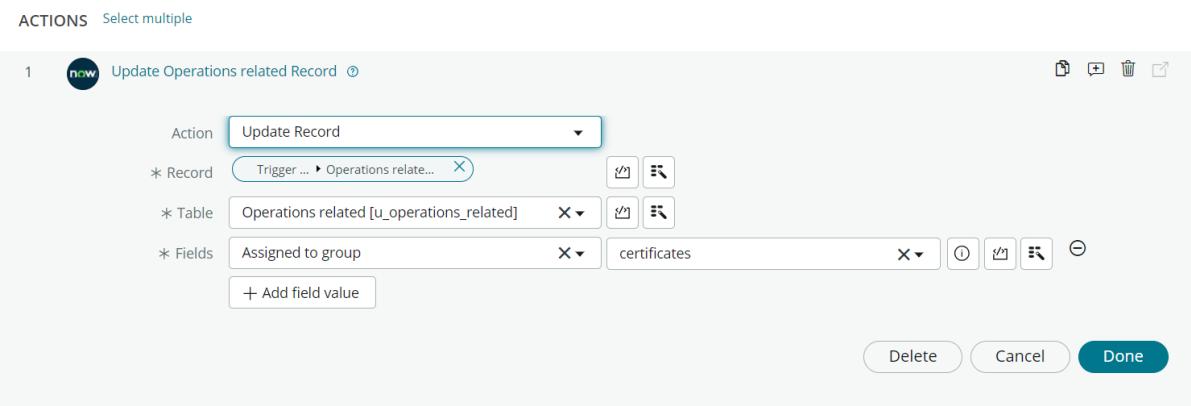
- Operator: *is*
- Value: *Regarding Certificates*



- Click on Done to save the trigger.

=>Add an Action

- Now under Actions, click on "Add an Action".
- In the action selection menu, search for and select "Update Record".
- In the Record field, drag and drop the record data from the Data panel on the left-hand side.
- The Table field will automatically populate based on the trigger.
- Under Fields, choose “Assigned to Group”.
- Set its Value to “Certificates”.

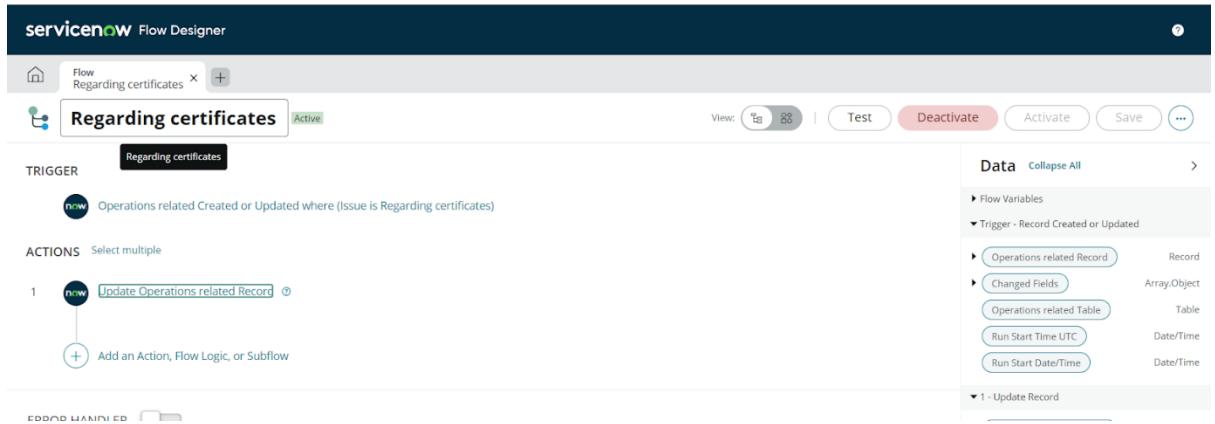


- Click on Done to complete the action.

=>Final Steps

- Click on Save to save your flow.

- Click on Activate to enable the flow so it automatically runs when the specified condition is met.



Create a Flow to Assign Operations Ticket to Platform Group:

- Open ServiceNow and log into your instance.
- Click on "All" in the left-hand navigation panel to expand the application modules.
- In the filter search bar, type "Flow Designer" and select "Flow Designer" under the Process Automation section.
- After Flow Designer opens, click on the "New" button and choose "Flow" to create a new flow.
- In the Flow Properties window, enter the Flow Name as “Regarding Platform”.
- Ensure that the Application is set to Global.
- For the Run As User, select System User from the dropdown list.
- Click on Submit to create and open the flow.

=>Add a Trigger

- Click on "Add a Trigger" to define the event that will activate the flow.
- In the trigger type selection, search for and choose "Create or Update Record".
- In the Table Name field, select "Operations related".
- Set the following Condition:
 - Field: *Issue*
 - Operator: *is*
 - Value: *Unable to login to platform*
- Click on "New Criteria" to add another condition.
 - Field: *Issue*
 - Operator: *is*
 - Value: *404 Error*

- Click on "New Criteria" again to add the third condition.
 - Field: *Issue*
 - Operator: *is*
 - Value: *Regarding User expired*
- After all criteria are added, click on Done to save the trigger.

=>Add an Action

- Under Actions, click on "Add an Action".
- In the action type selection, search for and select "Update Record".
- In the Record field, drag the record variable from the Data panel on the left-hand side.
- The Table field will be auto-populated as Operations related.
- Under Fields, select "Assigned to group".
- Set the value to "Platform" to route the ticket to the appropriate group.
- Click on Done to save the action.

=>Final Steps

- Click on Save to save the flow configuration.
- Click on Activate to enable the flow so it will run automatically when the specified issue conditions are met.

Conclusion:

The implementation of the automated ticket routing system at ABC Corporation has proven to be a significant success. By leveraging the robust features of ServiceNow, the project team was able to eliminate the inefficiencies of manual ticket assignment and replace them with a streamlined, rule-based automation process. This transformation has resulted in faster ticket resolution times, improved workload distribution among support teams, and better adherence to SLA commitments. Moreover, the system ensures that tickets are routed based on issue type, which enhances the accuracy and efficiency of support operations. Overall, this initiative not only increased operational efficiency but also contributed to a more organized and responsive IT support environment within the organization.