Assign Roles & Responsibilities to Team

➔ Proceed to Workspace

Users ⌄	Create Users ⌄	× Yalla Dhilleeswari	✔ ✖
Groups ⌄	Create Groups ⌄	× Yalla Dhilleeswari	✔ ✖
Roles ⌄	Create roles ⌄	× Uppada Lalitha	✔ ✖
Table ⌄	Create Table ⌄	× Thadangi Susmitha	✔ ✖
Assign roles & use ⌄	Assign roles & use ⌄	× Uppada Lalitha	✔ ✖
Assign roles & use ⌄	Assign roles & use ⌄	× Thadangi Susmitha	✔ ✖
Assign role to tab ⌄	Assign role to tab ⌄	× Sidipilli Mounika	✔ ✖
Create ACL ⌄	Create ACL ⌄	× Sidipilli Mounika	✔ ✖
Flow ⌄	Create a Flow to / ⌄	× Sidipilli Mounika	✔ ✖
Flow ⌄	Create a Flow to / ⌄	× Sidipilli Mounika	✔ ✖

+ ADD

FUNCTIONAL AND PERFORMANCE TESTING

MILESTONE -8 FLOW
ACTIVITY-1 Create a Flow to Assign operations ticket to group

PURPOSE:
Purpose of Creating a Flow to Assign Operations Ticket to Group: The purpose is to automate the process of directing operations-related tickets to the right support group.
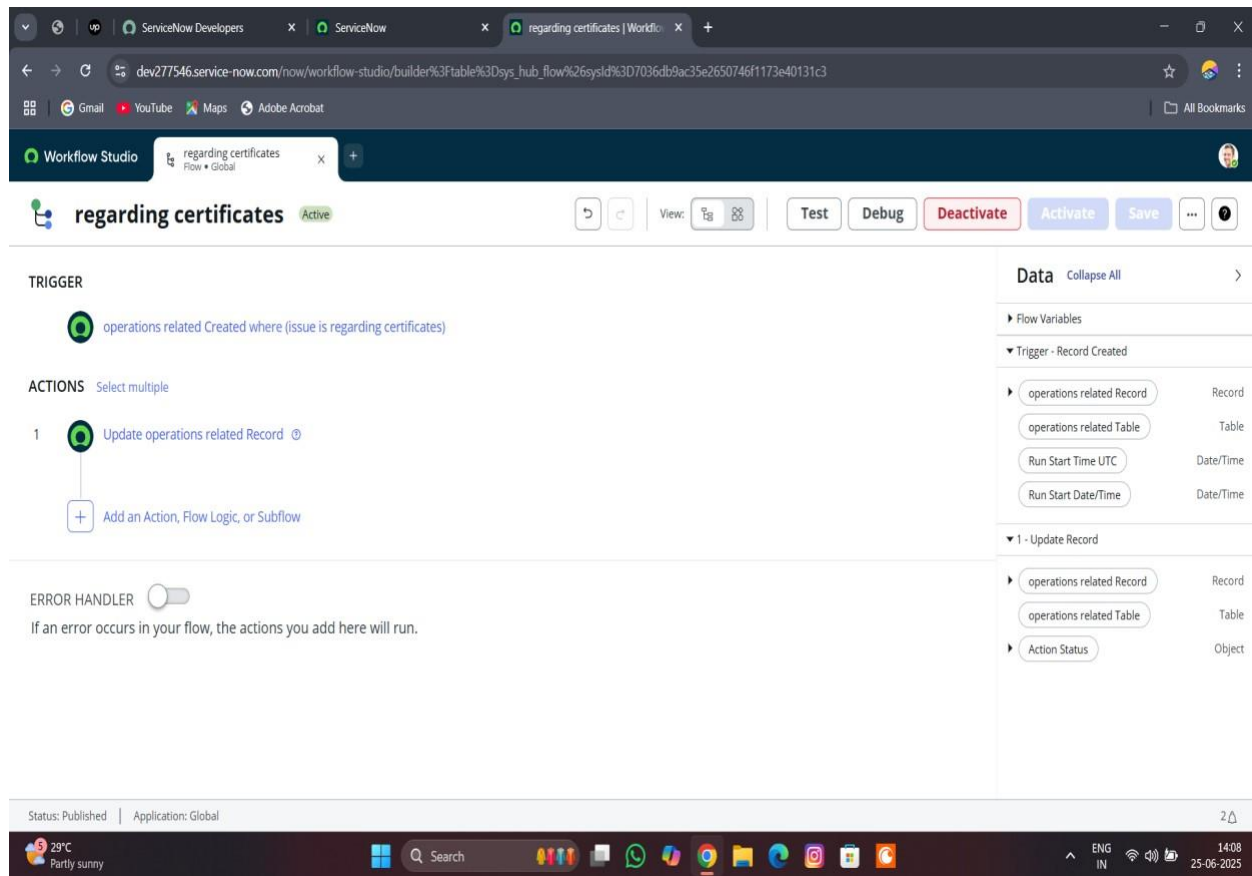
USES:
It automatically routes operations tickets to the correct group, speeding up ticket handling and improving support efficiency.

STEPS:

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.

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

PURPOSE:

To automatically assign operations tickets to the right platform experts, ensuring faster and accurate support.

USES:

It routes operations tickets to the correct platform specialists automatically, improving response time and support accurate

STEPS:

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.

Workflow Studio

regarding certificates
Flow • Global

regarding platform
Flow • Global

regarding platform Inactive

Test   Debug   **Activate**   **Save**   ···   ?

Action **Update Record** ▼

Action Inputs

✱ Record   Trigger... ▸ operations related...   X

✱ Table   operations related [u_operations... X ▼

✱ Fields   assigned to group   X ▼   platform   X ▼   ⓘ

        + Add field value

            Delete   **Cancel**   **Done**

＋ Add an Action, Flow Logic, or Subflow

ERROR HANDLER ◯

Status: Modified | Application: Global

Data Collapse All   >

▸ Flow Variables

▾ Trigger - Record Created

  ▸ operations related Record   Record
    operations related Table   Table
    Run Start Time UTC   Date/Time
    Run Start Date/Time   Date/Time

  ▾ 1 - Update Record

  ▸ operations related Record   Record
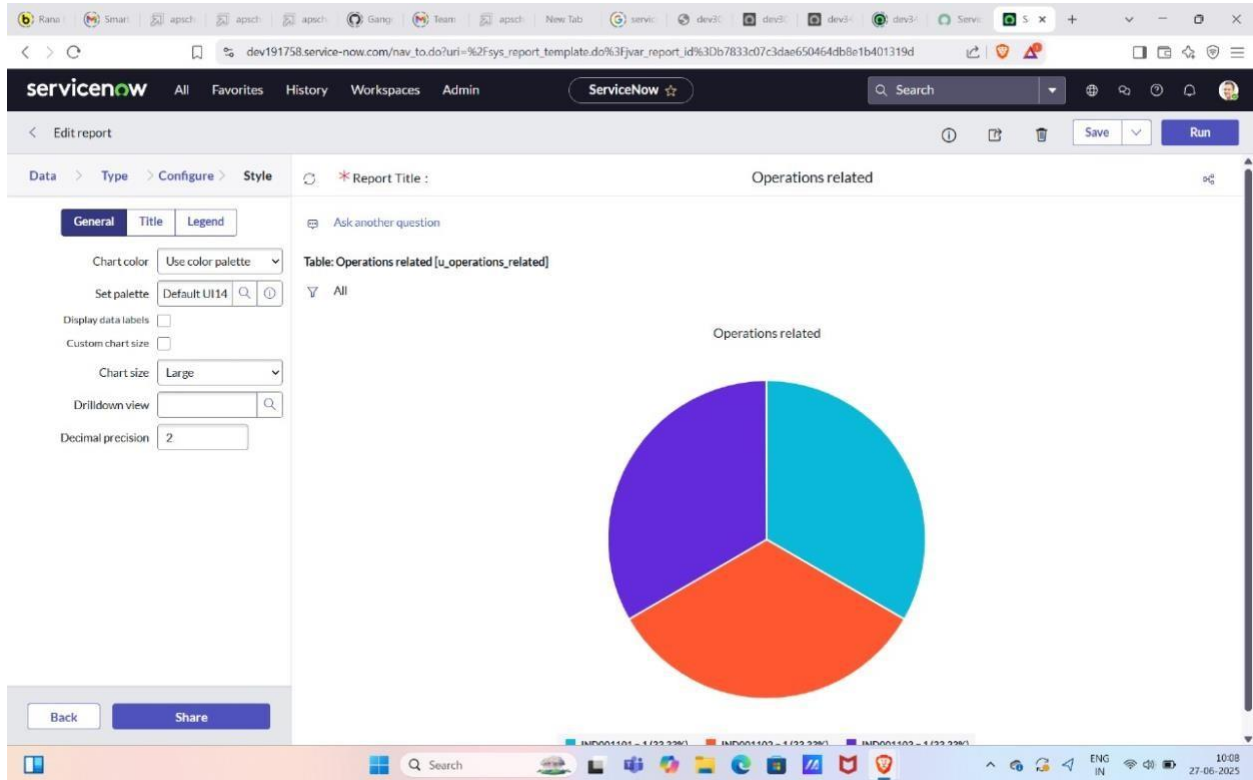   operations related Table   Table
  ▸ Action Status   Object

2 🔔

RESULTS:

Advantages and disadvantages

ADVANTAGES:

1. Faster ticket response and resolution
2. Balanced workload among support agent
3. Improved customer satisfaction
4. Reduced manual errors in ticket assignment
5. Better tracking and accountability of tickets
6. Higher agent productivity and efficiency
7. Improved SLA compliance
8. Easier handling of high ticket volumes
9. Quicker identification of critical issu
10. Supports automation and smart routing

DISADVANTAGES;

1. May require complex initial setup and configuration
2. Risk of incorrect auto-assignment if rules are not properly defined
3. Reduced flexibility for handling unique or exceptional cases
4. Dependence on accurate and updated agent skill data
5. Potential over-reliance on automation, reducing human oversight
6. System errors or misconfigurations can delay ticket resolution

7.Can require ongoing maintenance to keep assignment rules effective

8.May not account for sudden changes in agent availability or workload

9.Can lead to agent dissatisfaction if workload balancing is not properly tuned

10.Initial training and adoption may take time for support teams

CONCLUSION:

Streamlining ticket assignment is a critical strategy for improving the efficiency and effectiveness of support operations. By automating the process of routing tickets to the most appropriate agents or teams, organizations can significantly reduce response and resolution times. This leads to faster service delivery, ensuring that customer issues are addressed promptly, which directly enhances customer satisfaction and builds trust.

An efficient ticket assignment process also ensures that workloads are evenly distributed among agents, preventing burnout and improving overall team morale. It minimizes manual errors, reducing the chances of misrouted or delayed tickets that could impact service quality. Additionally, streamlined assignment supports better SLA compliance by ensuring tickets are prioritized and handled within the required timeframes.

Automating ticket assignment also improves visibility and accountability, as it clearly defines ownership from the start, making it easier to track ticket progress and agent performance. It enables support teams to scale efficiently, especially when handling large volumes of tickets, and lays the groundwork for advanced technologies like AI-based routing and predictive analytics.

However, it's important to regularly review and update the assignment rules to accommodate changing team structures, workloads, and skill sets. Without proper configuration and ongoing maintenance, the system may introduce new challenges, such as incorrect routing or lack of flexibility for special cases.