

# **Streamlining Ticket Assignment For Support Operations**

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## **Problem Statement:**

The current ticket assignment process is manual and inefficient, leading to delayed response times, uneven workload distribution, and reduced overall effectiveness of support operations.

## **Objective:**

To develop and implement an automated ticket assignment system that ensures faster response times, balanced workload distribution, and improved efficiency in support operations.

## **Skills:**

Skills required include workflow automation, CRM tool proficiency, data analysis, and process optimization for efficient ticket assignment.

# 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. Click on new
5. Fill the following details to create a new user
6. Click on submit

dev249720.service-now.com/now/nav/ui/classic/params/target/sys\_user.do%3Fsys\_id%3D-1%26sys\_is\_list%3Dtrue%26sys\_target%3Dsys\_user%26sysparm\_checked...

servicenow All Favorites History Workspaces User - New Record Search

User New record Submit

To set up the User's password, save the record and then click Set Password.

User ID	manne niranjan	Email	niranjanreddymanne2507@gmail.c
First name	manne	Language	-- None --
Last name	niranjan	Calendar integration	Outlook
Title		Time zone	System (America/Los_Angeles)
Department		Date format	System (yyyy-MM-dd)
Business phone		Mobile phone	
Photo			Click to add...

Password needs reset ☐

Locked out ☐

Active ☒

Web service access only ☐

Internal Integration User ☐

Submit

Deleted Links

Create one more user:

7. Create another user with the following details

8. Click on submit

The screenshot shows the ServiceNow 'User - New Record' form. The browser address bar displays the URL: `dev249720.service-now.com/now/nav/ui/classic/params/target/sys_user.do%3Fsys_id%3D-1%26sys_js_list%3Dtrue%26sys_target%3Dsys_user%26sysparm_checked_ite...`. The ServiceNow header includes the logo, navigation links (All, Favorites, History, Workspaces), a 'User - New Record' button, a search bar, and user profile icons. The form title bar shows 'User' and 'New record' with a 'Submit' button. A blue information banner at the top states: 'To set up the User's password, save the record and then click Set Password.' The form fields are organized into two columns. The left column contains: 'User ID' (text box with 'katherine pierce'), 'First name' (text box with 'katherine'), 'Last name' (text box with 'pierce'), 'Title' (text box with a location pin icon), 'Department' (text box with a magnifying glass icon), and checkboxes for 'Password needs reset', 'Locked out', 'Active' (checked), 'Web service access only', and 'Internal Integration User'. The right column contains: 'Email' (text box with an envelope icon), 'Language' (dropdown menu with '-- None --'), 'Calendar integration' (dropdown menu with 'Outlook'), 'Time zone' (dropdown menu with 'System (America/Los Angeles)'), 'Date format' (dropdown menu with 'System (yyyy-MM-dd)'), 'Business phone' (text box), 'Mobile phone' (text box), and a 'Photo' section with a 'Click to add...' link. A 'Submit' button is located at the bottom left of the form.

dev249720.service-now.com/now/nav/ui/classic/params/target/sys\_user.do%3Fsys\_id%3D-1%26sys\_js\_list%3Dtrue%26sys\_target%3Dsys\_user%26sysparm\_checked\_ite...

servicenow All Favorites History Workspaces User - New Record Search

User New record Submit

To set up the User's password, save the record and then click Set Password.

User ID katherine pierce Email

First name katherine Language -- None --

Last name pierce Calendar integration Outlook

Title Title icon Time zone System (America/Los Angeles)

Department Department icon Date format System (yyyy-MM-dd)

Password needs reset Locked out Active Web service access only Internal Integration User

Business phone Mobile phone Photo Click to add...

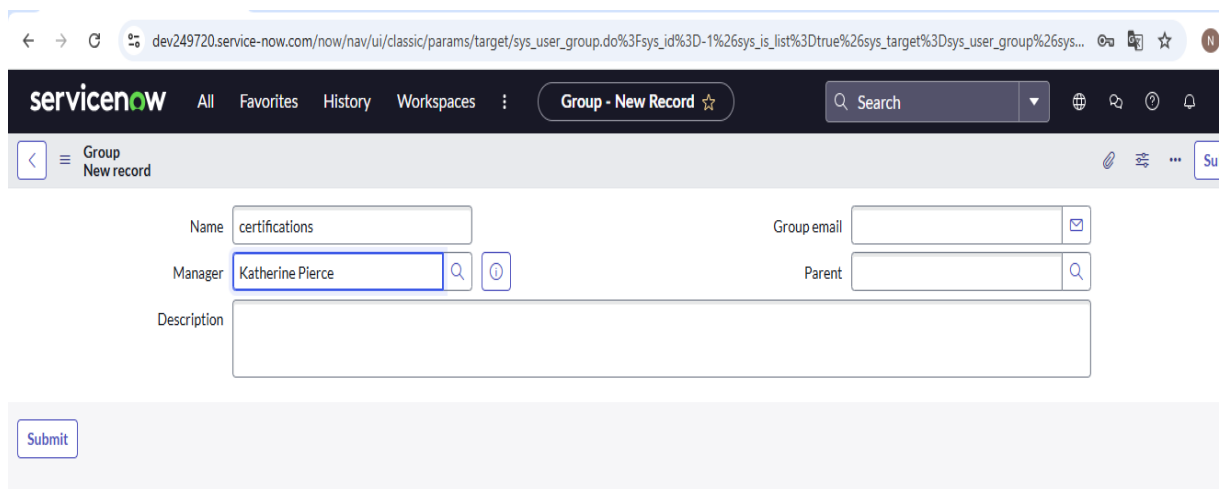
Submit

Related links

# 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



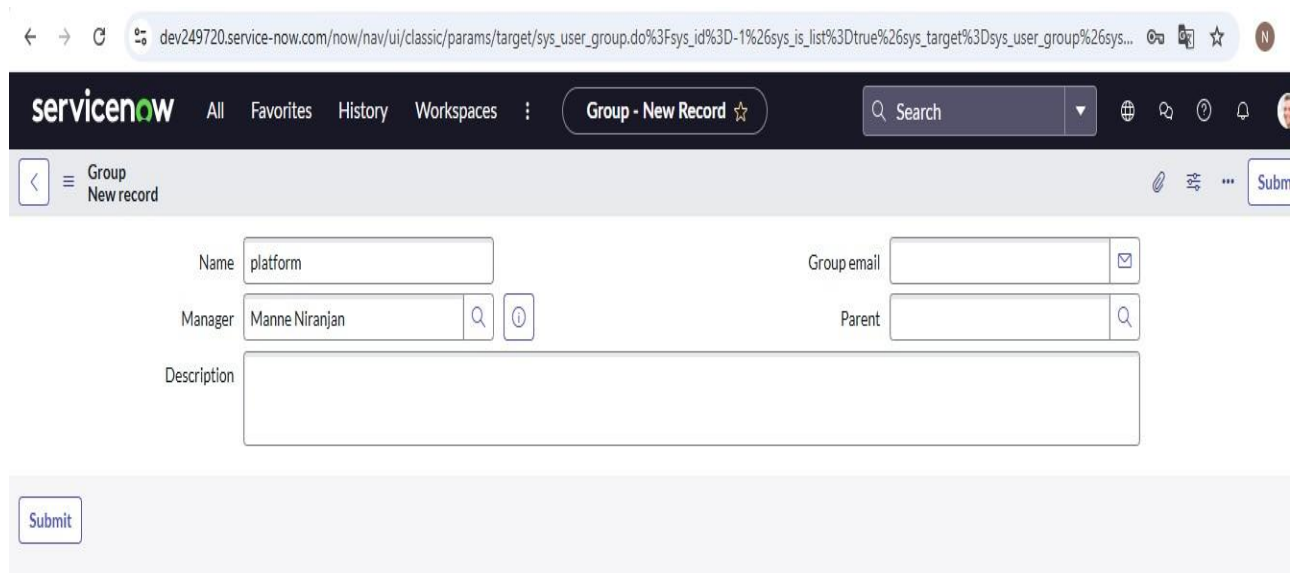
The screenshot shows the ServiceNow 'Group - New Record' form. The browser address bar displays a URL from dev249720.service-now.com. The ServiceNow header includes the logo, navigation tabs (All, Favorites, History, Workspaces), and a 'Group - New Record' button. The form fields are as follows:

- Name:** A text input field containing 'certifications'.
- Group email:** A text input field with an email icon on the right.
- Manager:** A dropdown menu showing 'Katherine Pierce' with a search icon and a user icon.
- Parent:** A dropdown menu with a search icon.
- Description:** A large text area.

A 'Submit' button is located at the bottom left of the form.

Create one more group:

7. Create another group with the following details



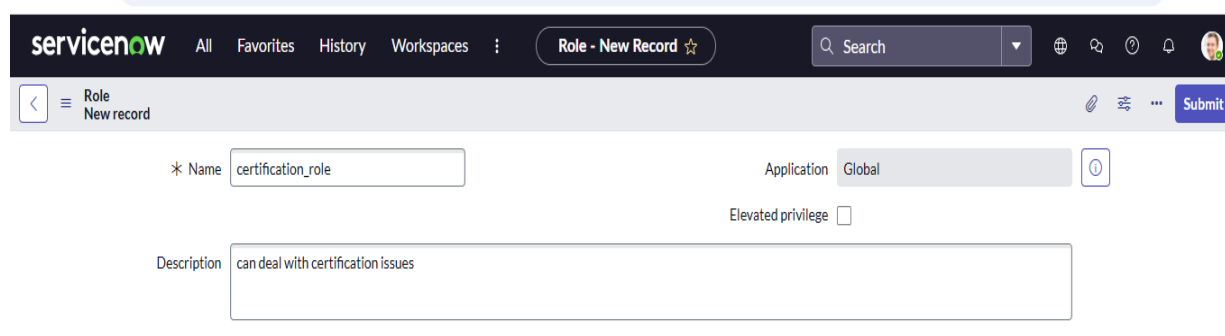
The screenshot shows the 'Group - New Record' form in ServiceNow. The browser address bar displays a URL with a long alphanumeric string. The ServiceNow header includes navigation links (All, Favorites, History, Workspaces), a 'Group - New Record' button, and a search bar. The form fields are: 'Name' (platform), 'Group email' (empty), 'Manager' (Manne Niranjana), 'Parent' (empty), and 'Description' (empty). A 'Submit' button is located at the bottom left of the form area.

8. Click on submit

## Milestone 3 : Roles

### Activity 1: Create roles

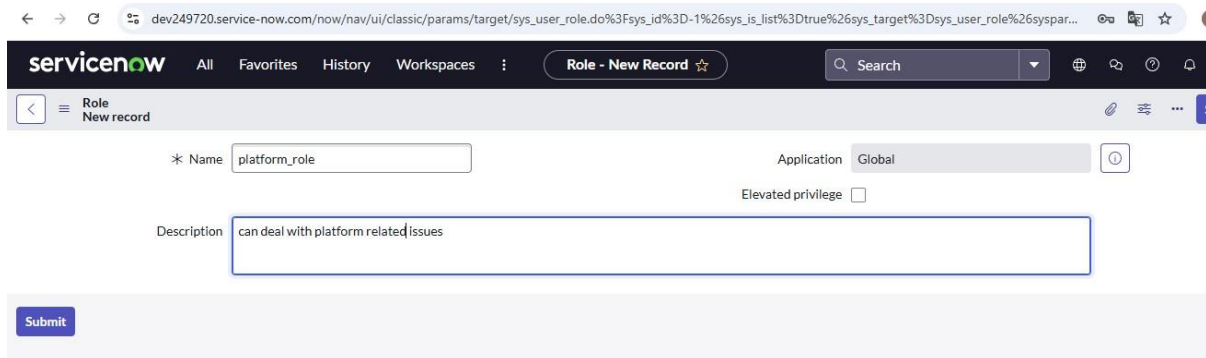
1. Open service now.
2. Click on All >> search for roles
3. Select roles under system security
4. Click on new
5. Fill the following details to create a new role
6. Click on submit



The screenshot shows the 'Role - New Record' form in ServiceNow. The header includes navigation links, a 'Role - New Record' button, and a search bar. The form fields are: '\* Name' (certification\_role), 'Application' (Global), 'Elevated privilege' (checkbox), and 'Description' (can deal with certification issues). A 'Submit' button is located at the bottom right of the form area.

Create one more role:

7. Create another role with the following details



The screenshot shows the ServiceNow 'Role - New Record' form. The browser address bar displays a URL starting with 'dev249720.service-now.com'. The ServiceNow header includes navigation links for 'All', 'Favorites', 'History', and 'Workspaces', along with a 'Role - New Record' button and a search bar. The form fields are as follows:

- \* Name:
- Application:
- Elevated privilege: ☐
- Description:

A 'Submit' button is located at the bottom left of the form.

8. Click on submit

## Milestone 4 : Table

### Activity 1: Create Table

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 : project table

Check the boxes Create module & Create mobile module

6. Under new menu name : project table

7. Under table columns give the columns

dev249720.service-now.com/now/nav/ui/classic/params/target/sys\_db\_object.do%3Fsys\_id%3D-1%26sys\_is\_list%3Dtrue%26sys\_target%3Dsys\_db\_object%26syspa...

**servicenow** All Favorites History Workspaces Table - New Record Search

< Table New record Submit Can

\* Name  Create module ☒

Extends table  Create mobile module ☒

Add module to menu -- Create new -- New menu name

Columns Controls Application Access

Table Columns for text Search

Dictionary Entries

	Column label	Type	Reference	Max length	Default value	Display
X	assigned to group	Reference	Group			false
X	assigned to user	Reference	User			false
X	Comment	String				false
X	Issue	Choice				false
X	Name	String				false
X	priority	String				false

8. Click on submit

dev249720.service-now.com/now/nav/ui/classic/params/target/sys\_dictionary.do%3Fsys\_id%3D0aeb7a10c3b72210f7a6b34ed401313e%26sysparm\_record\_target%...

**servicenow** All Favorites History Admin Dictionary Entry - Issue Search

< Dictionary Entry Issue Create Choice List Delete Column Update

Choice

Create Choice List Delete Column Update

Related Links

[Show Table](#)

[Run Point Scan](#)

[Advanced view](#)

Access Controls Choices (4) Attributes Labels (1)

Label Search Actions on selected rows... New

Choices

	Label	Value	Language	Sequence	Inactive	Updated
	unable to login to platform	unable to login to platform	en		false	2025-09-01 09:15:36
	404 error	404 error	en		false	2025-09-01 09:15:07
	regarding certificates	regarding certificates	en		false	2025-09-01 09:16:33
	regarding user expired	regarding user expired	en		false	2025-09-01 09:14:39
+	Insert a new row...					



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

- unable to login to platform
- 404 error
- regarding certificates
- regarding user expired

## **Milestone 5 : Assign Roles & users 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

dev249720.service-now.com/now/nav/ui/classic/params/target/sys\_user\_group.do%3Fsys\_id%3Dca0ca9d4c3332210f7a6b34ed401317a%26sysparm\_record\_target...

**servicenow** All Favorites History Workspaces Group - certification Search

Group certification Update Delete

Name: certification Group email:

Manager: Katherine Pierce Parent:

Description:

Update Delete

Roles (1) Group Members (1) Groups

Role Search Actions on selected rows... Edit...

Group = certification

Created	Role	Granted by	Inherits
2025-09-05 00:21:13	Certification_role	(empty)	true

1 to 1 of 1

## 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

**servicenow** All Favorites History Workspaces **Group - platform** Search

Group platform Update Delete

Name  Group email

Manager  Parent

Description

Update Delete

Roles (1) Group Members (1) Groups

Role Search Actions on selected rows... Edit...

Group = platform

Created	Role	Granted by	Inherits
2025-09-05 02:40:41	platform_role	(empty)	true

1 to 1 of 1

## Milestone 6 : Assign roles to users

### Activity 1: Assign role to table

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

The screenshot shows the ServiceNow interface for editing an Access Control rule named 'u\_operations\_related'. The browser address bar shows a URL from dev249720.service-now.com. The page header includes the ServiceNow logo, navigation tabs (All, Favorites, History), a search bar, and the current page title 'Access Control - u\_operations\_related'. The main form area has a 'Description' field with the text 'Default access control on u\_operations\_related'. Below this is an 'Applies To' section showing 'No. of records matching the condition: 0' and buttons for 'Add Filter Condition' and 'Add "OR" Clause'. There is also a field for '-- choose field --' and a '-- value --' field. At the bottom, there is a 'Conditions' section with a blue informational box stating: 'Access Control Rules have two decision types, and these types will behave differently depending on conditions. 1. Allow Access: Allows access to a resource if all conditions are met. 2. Deny Access: Denies access to a resource unless all conditions are met. More Info'. Below this is a 'Requires role' section with a table listing roles: 'u\_operations\_related\_user', 'platform\_role', and 'Certification\_role'. Each role has a red 'X' icon to its left.

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 : Application access

### 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

Access Control - New Record

\* Type: record

\* Operation: write

Decision Type: Allow If

Application: Global

Active: ☒

Admin overrides: ☒

Protection policy: -- None --

\* Name: operations related [u\_operations\_related]

Priority:

Description:

Applies To: No. of records matching the condition: 0

Add Filter Condition Add "OR" Clause

-- choose field -- -- oper -- -- value --

Conditions

Access Control Rules have two decision types, and these types will behave differently depending on conditions.

1. Allow Access: Allows access to a resource if all conditions are met.

2. Deny Access: Denies access to a resource unless all conditions are met.

6. Scroll down under requires role

7. Double click on insert a new row

8. Give admin role

9. Click on submit

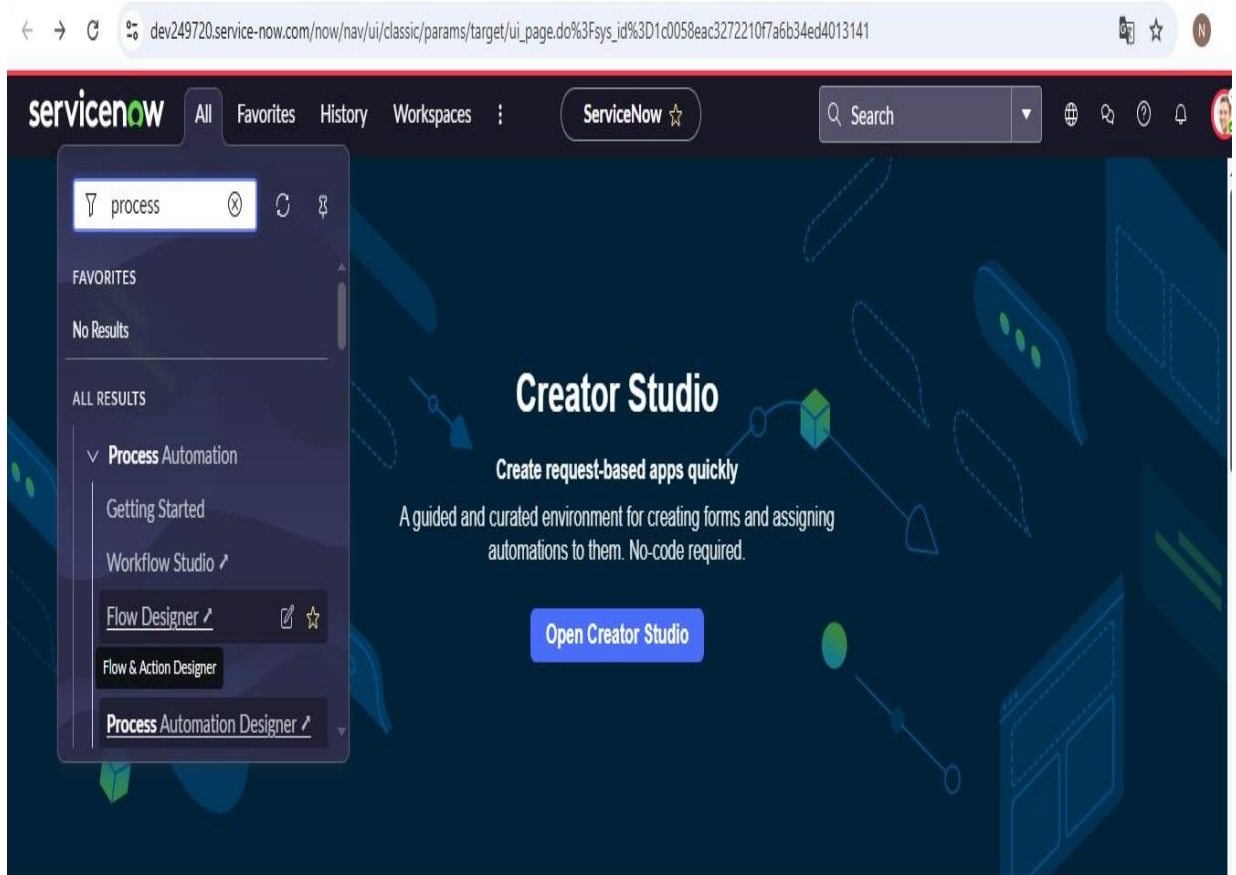
10. Similarly create 4 acl for the following fields

Name	Decision Type	Operation	Type	Active	Updated by	Updated
Search	Search	Search	Search	Search	Search	Search
u_operations_related.u_priority	Allow If	write	record	true	admin	2025-09-06 00
*	Allow If	write	record	true	admin	2025-09-06 00
u_operations_related.u_priority	Allow If	write	record	true	admin	2025-09-05 03
u_operations_related	Allow If	read	record	true	admin	2025-09-05 01
u_operations	Allow If	write	record	true	admin	2025-09-01 09

## 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.

Workflow Studio

New Flow

### Let's get the details for your flow

Flow name \*

Application \*

Description

▼ Hide additional properties

Protection

Run as

Flow priority default

Cancel Build flow

Option that you can select to specify that the flow runs as a system user or the user who initiates the session.

Workflow Studio

Homepage Operations Integrations

Playbooks Flows Subflows Actions Decision tables

Flows 70  
Last refreshed 2m ago

Name	Application	Status	Active	Update
Regarding Platform	Global	Published	true	2025-08-26 08:32:00
Admin Deployment Approval Flow Error Notifier	App Engine Studio	Published	true	2020-07-28 13:37:10
Admin Install App to Production Environment Flow Error Notifier	App Engine Studio	Published	true	2020-07-28 13:37:10
Application Intake Request Flow	Application Intake	Published	true	2025-08-26 08:32:00
Application Intake Request V2	Application Intake	Published	true	2025-08-26 08:31:50
Benchmark Recommendation Evaluator	Benchmarks Spoke	Published	true	2025-02-11 15:28:50
Business process approval flow	Global	Published	true	2020-09-27 22:06:10

New ▼

- Playbook
- Flow
- Subflow
- Action
- Decision table

Pick up where you left off

- Regarding Platform  
Last updated: Yesterday at 10:26 ...
- regarding certifications  
Last updated: Yesterday at 10:17 ...
- Create Flow Data  
Last updated: a year ago by System Administrator

Latest updates

- System Administrator modified Regarding Platform  
Yesterday at 10:26 AM
- System Administrator modified regarding certifications  
Yesterday at 10:17 AM
- System Administrator modified Create Flow Data

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

Click or hit enter to Collapse ServiceNow Core Record Trigger for operations related Created or Updated where (Issue is unable to login to platform; Issue is 404 error; Issue is regarding user expired) Collapse All

operations related Created or Updated where (Issue is unable to login to platform; Issue is 404 error; Issue is regarding user expired)

Trigger Created or Updated

\* Table operations related [u\_operation... X▼

Condition All of these conditions must be met

Issue is unable to login to platform OR AND

or

All of these conditions must be met

Issue is 404 error OR AND

or

All of these conditions must be met

Issue is regarding user expired OR AND

or

Flow Variables

▼ Trigger - Record Created or Updated

operations related Record

Changed Fields

operations related Table

Run Start Time UTC

Run Start Date/Time

▼ 1 - Update Record

operations related Record

operations related Table

Action Status



Click on Add an action.

7. Select action in that search for “ Update Record ”.

8. In Record field drag the fields from the data navigation from left side

9. Table will be auto assigned after that Give the field as Give value as “ Certificates ”

10. Click on Done.

11. Click on Save to save the Flow.

12. Click on Activate.

Click or hit enter to Collapse ServiceNow Core Record Trigger for operations related Created or Updated where (Issue is unable to login to platform; Issue is 404 error; Issue is regarding user expired)

operations related Created or Updated where (Issue is unable to login to platform; Issue is 404 error; Issue is regarding user expired)

Trigger: Created or Updated

\* Table: operations related [u\_operation...] X

Condition: All of these conditions must be met

Issue is unable to login to platform

or

All of these conditions must be met

Issue is 404 error

or

All of these conditions must be met

Issue is regarding user expired

or

Flow Variables

Trigger - Record Created or Updated

operations related Record

Changed Fields

operations related Table

Run Start Time UTC

Run Start Date/Time

1 - Update Record

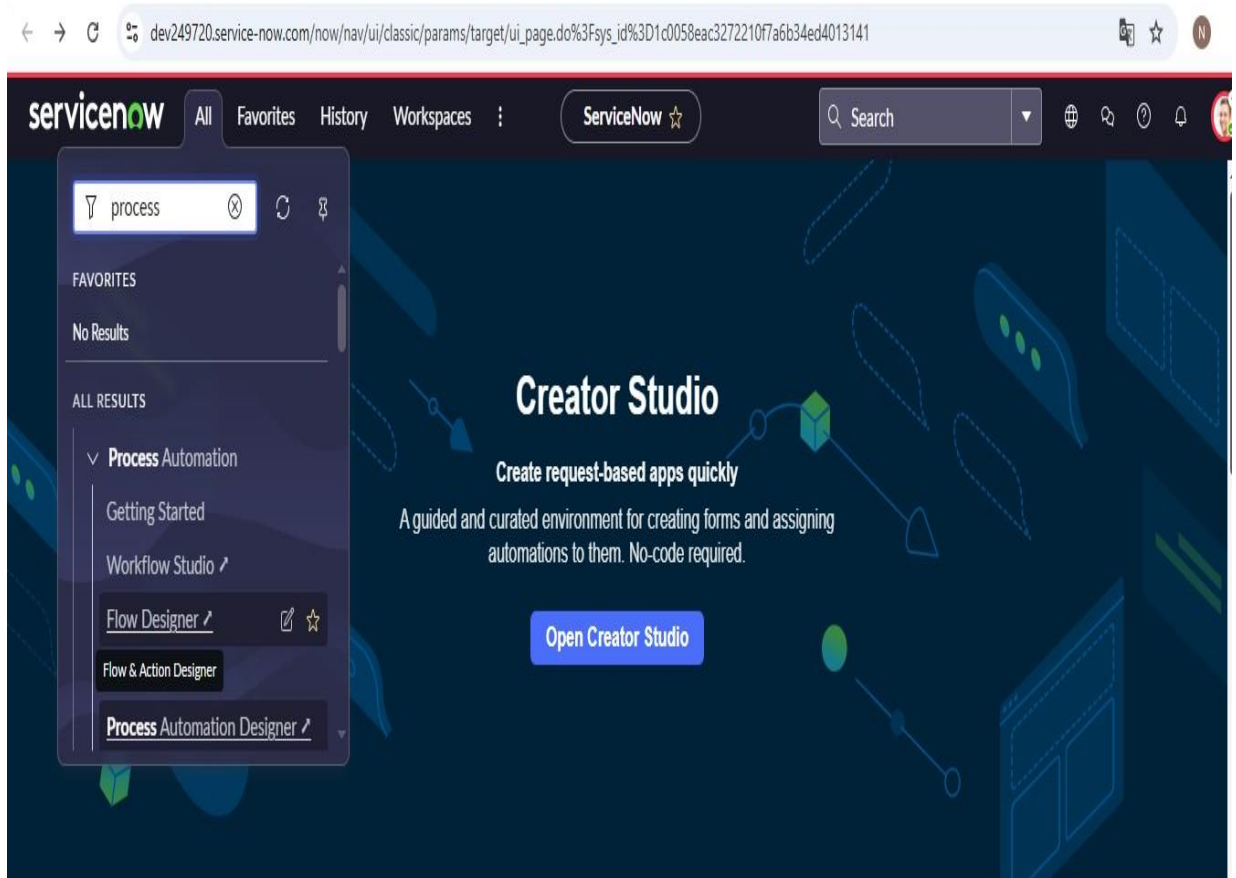
operations related Record

operations related Table

Action Status

## 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

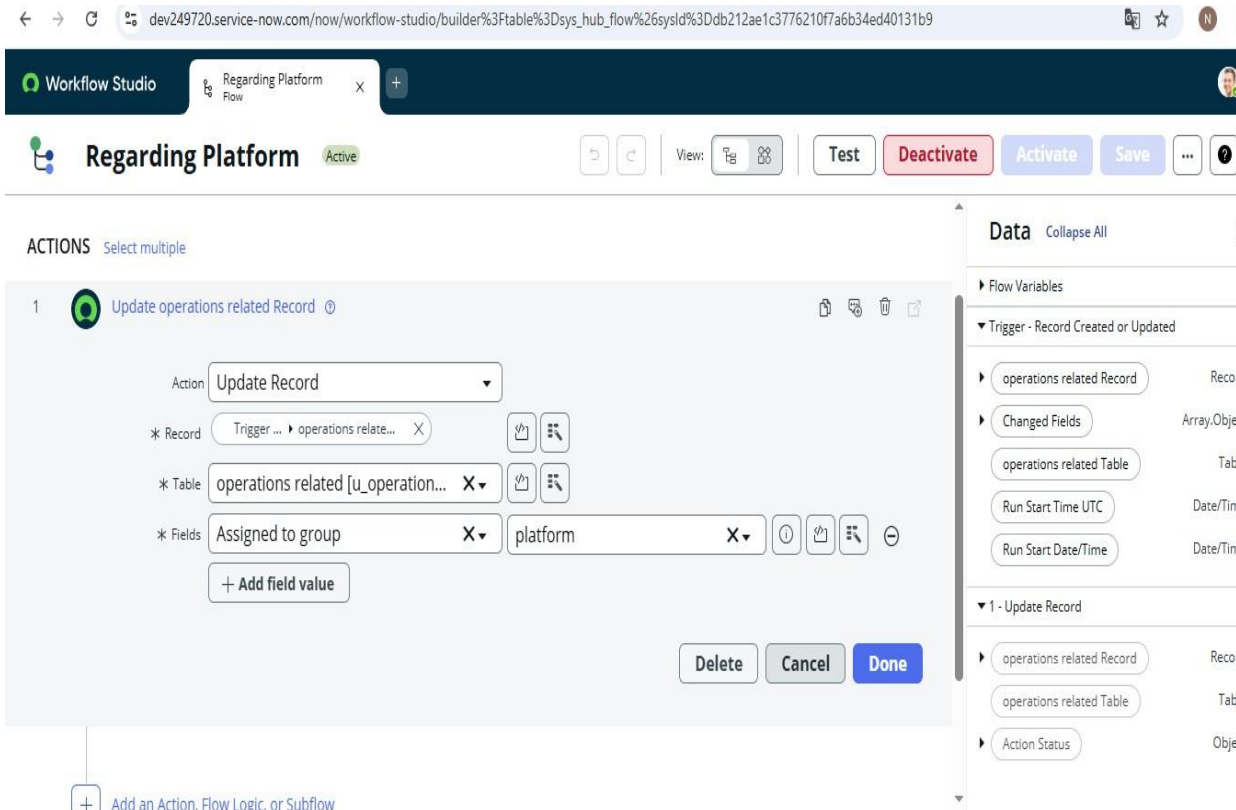
5. Click on New Criteria

Field : issue  
Operator : is  
Value : 404 Error

6. Click on New Criteria

Field : issue  
Operator : is  
Value : Regrading User expired

7. Now under Actions.
8. Click on Add an action.
9. Select action in that search for “ Update Record ”.
10. In Record field drag the fields from the data navigation from left side

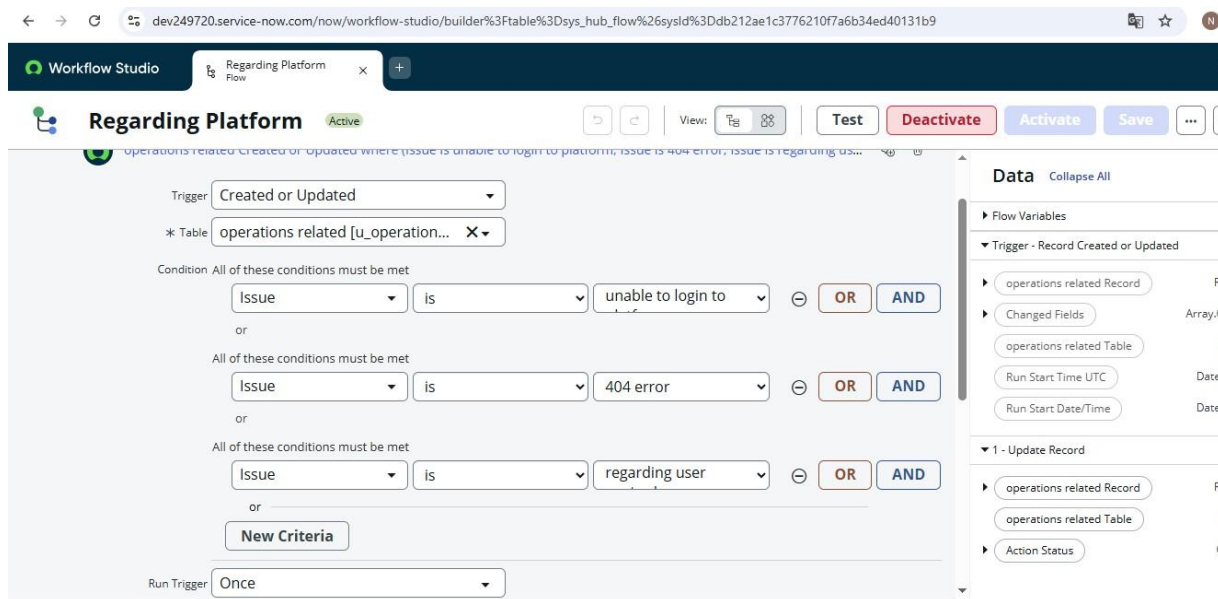


11. Table will be auto assigned after that Give the field as Assigned to group ”.

12. Give value as “ Platform ”.

13. Click on Done.

14. Click on Save to save the Flow.



15. 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.

Drive Link:

[https://drive.google.com/file/d/10wTI0N4BzdD7HSAEtAnKS-UN73EiZ6o9/view?usp=drive\\_link](https://drive.google.com/file/d/10wTI0N4BzdD7HSAEtAnKS-UN73EiZ6o9/view?usp=drive_link)



Click Here TO Watch Demo Video