Streamlining Ticket Assignment for Efficient Support Operations

Project Overview

The Ticket Assignment Optimization Project is designed to automate and improve the way customer support tickets are distributed among agents. The project involves:

- Creating a structured ticketing system.
- Implementing auto-assignment rules based on skill, workload, and availability.
- Designing forms and dashboards for visibility. Establishing relationships between ticket categories and support agents.
- Adding business rules to automate ticket routing and monitoring.

This project showcases how automation and AI can reduce delays, balance workloads, and enhance customer satisfaction in IT support.

Setting up the Environment

1. Select the platform (ServiceNow, Freshdesk, or a custom Python/Node.js app).

2. Create a development instance or workspace.

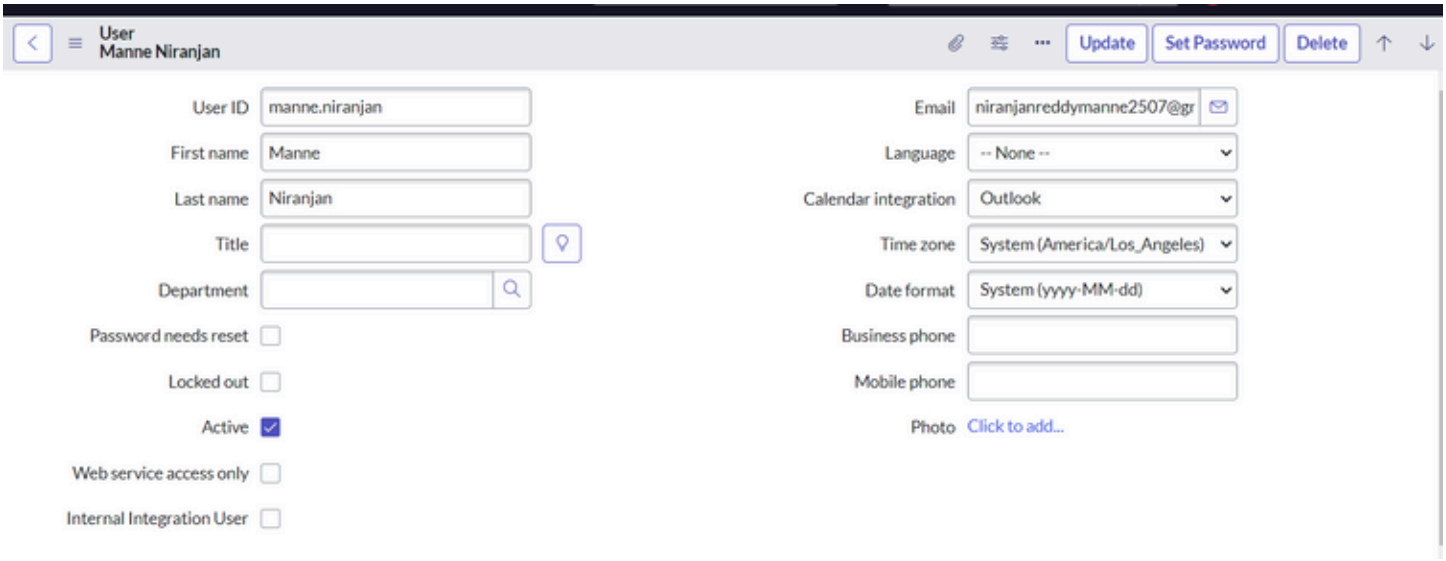
3. Configure ticket intake channels such as Email, Web Portal, or Chatbot.

4. Navigate to the application workspace to create and manage the ticket system.

Create Users

1. Log in to **ServiceNow**.
2. Go to **All → Search for "Users"**.
3. From the results, select **Users** under *System Security*.
4. Click on **New** to add a user.
5. Enter the required details for the new user.

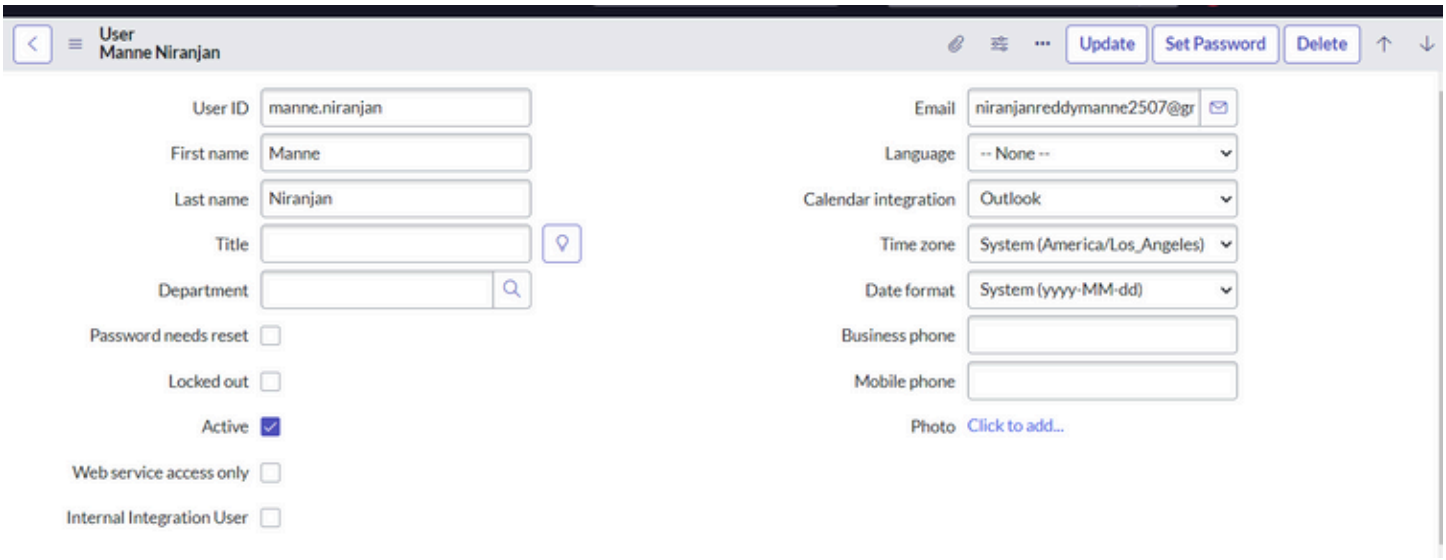
1.



1. Click **Submit** to save.

Create Another User

1. Repeat the same steps to create another user by filling in the given details.
2.



1. Finally, click **Submit** to save the second user.

Create Groups

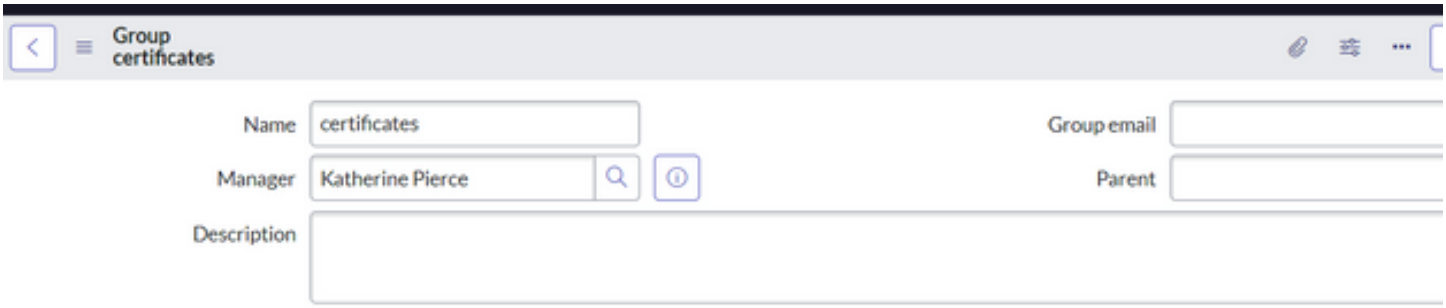
1. Open ServiceNow.

2. Click All and type Groups in the search bar.

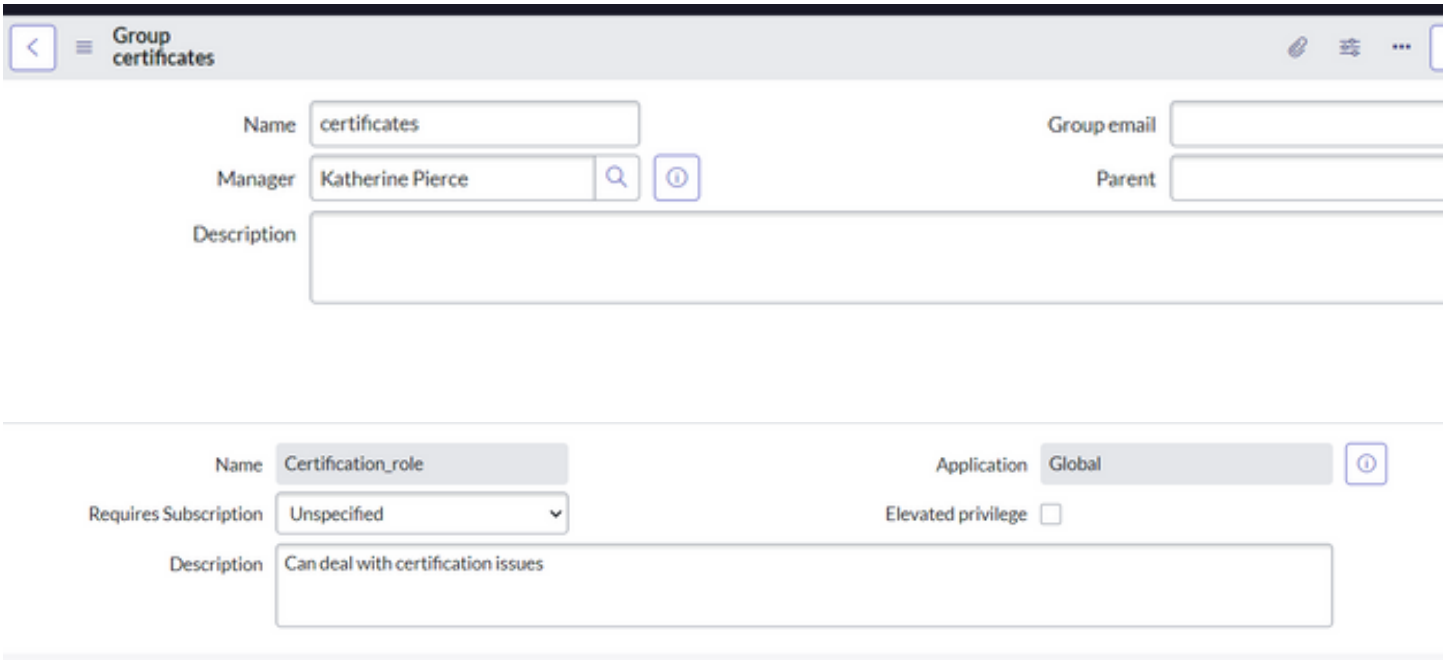
3. Select Groups under System Security.

4. Click New to open the Create Group form.

5. Fill in the required details to create the new group.



6. Click Submit to save the group.



7.To create another group, repeat steps 1–6 using the next group's details and then click Submit

Create Roles

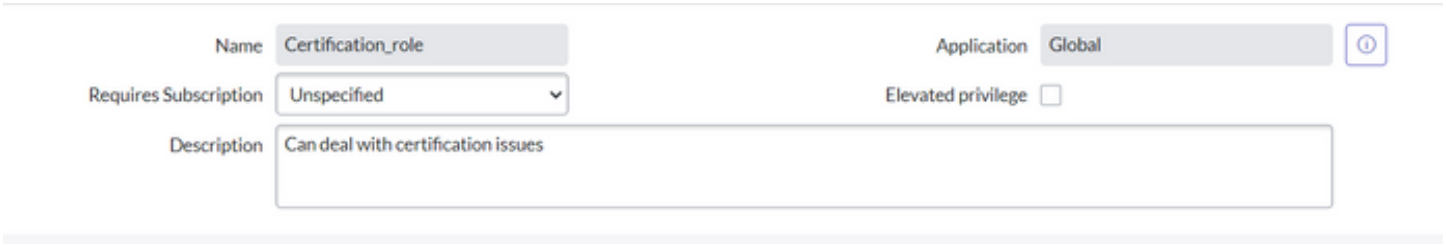
1. Launch ServiceNow.

2. Open All and type Roles into the search box.

3. Choose Roles from the System Security section.

4. Click New to open the Create Role form.

5.Enter the required role information (for example: name, description, permissions).



6. Click Submit (or Save) to add the role.

7. To create an additional role, repeat steps 1–6 with the next role's details and submit.

Create a new Table

1. Log in to ServiceNow.

2. From the left navigation, go to All and search for Tables.

3. Under System Definition, select Tables.

4. Click on New to create a table.

5. Enter the following details:

Label: Operations related

Check the boxes for Create module and Create mobile module.

6. In the New Menu Name, type Operations related.

7. Add the required columns under the Table Columns section.

	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. Once done, click Submit to save the table.

Add Choices for the Issue Field (using Form Design)

Create options for the Issue field with the following values:

- Unable to login to platform
- 404 error
- Regarding certificates
- Regarding user expired

Assign Roles&users to certificate Group

1. Open ServiceNow.

2. Go to All and search for Tables.

3. From the results, choose Tables under System Definition.

4. Open the Certificates Group record.

5. In the Group Members section, click Edit.

6. Add Katherine Pierce as a member and save the changes.

7. Next, go to the Roles section.

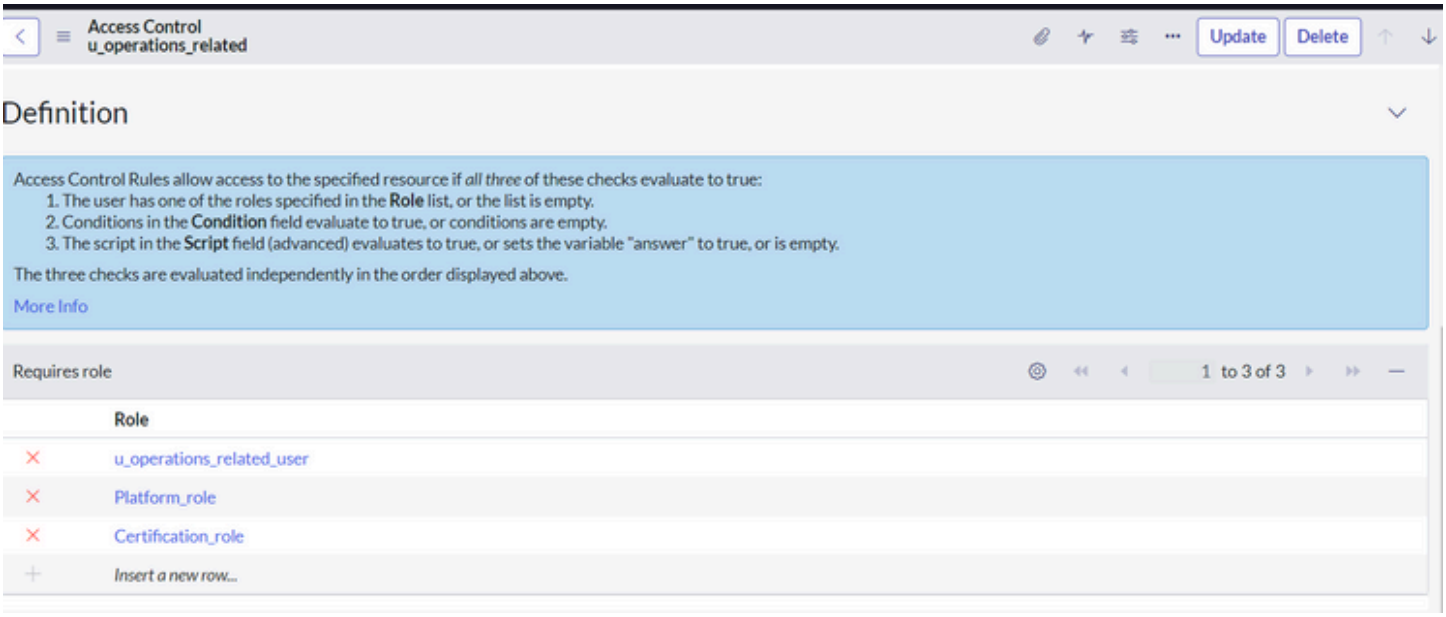
8.Select Certification_role and save it.

Assign roles & users to the Platform group

1. Sign in to ServiceNow and open the main dashboard.
2. From the left-hand menu, expand All and search for Tables.
3. Click Tables under the System Definition section.
4. Locate and open the Platform group record.
5. Scroll to the Group Members related list.
6. Click Edit to change the group's members.
7. Add Manne Niranjan to the member list, then click Save.

Assign a Role to a Table

1. Log in to ServiceNow.
2. From the left-hand menu, go to All and search for Tables.
3. Open the Operations related table.
4. Navigate to the Application Access section.
5. Select the entry for u_operations_related – Read operation.
6. Click your profile icon in the top-right corner.
7. Choose Elevate Role.
8. Select Security Admin and click Update.
9. In the Requires Role list,
10. Double-click to add a new row.
11. Assign the Platform role.
12. Also add the Certificate role.
13. Click Update to save.



14. Next, open u_operations_related – Write operation

15. Again, go to the Requires Role field.

16. Double-click to add a new row.

17. Assign the Platform role.

18. Add the Certificate role as well.

Create an ACL

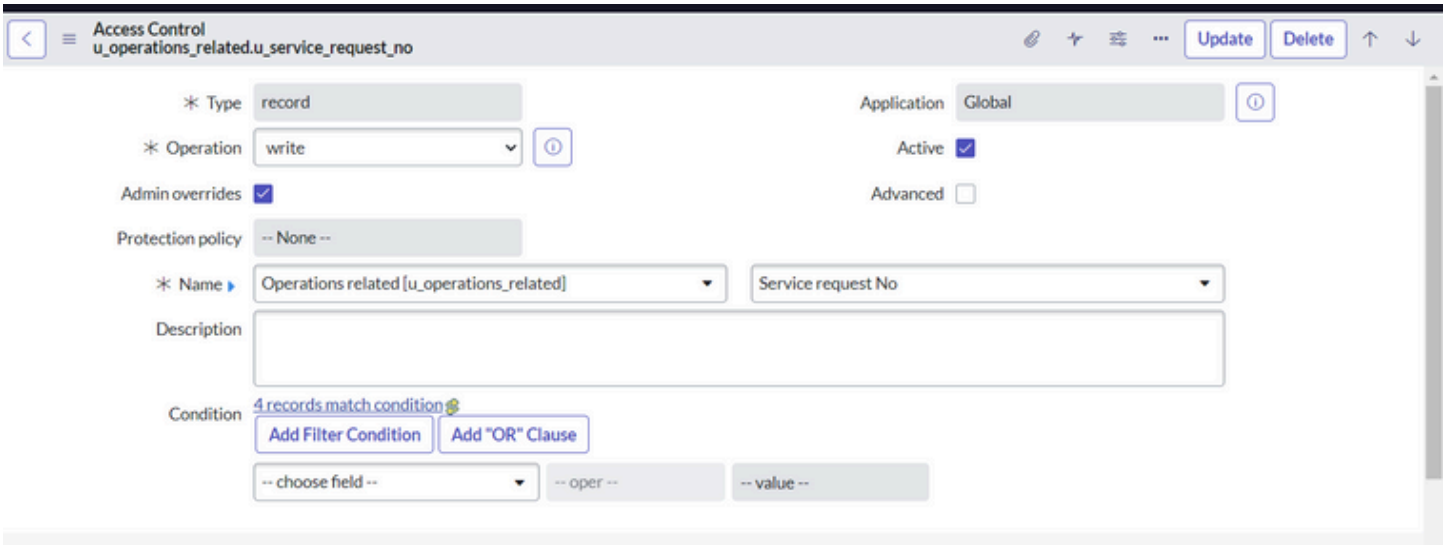
1. Log in to ServiceNow.

2. From the left navigation menu, click All and search for ACL.

3. Under System Security, select Access Control (ACL).

4. Click on New to create a fresh ACL.

5. Enter the required details for the new ACL.



6. Scroll down to the Requires Role section.

7. Double-click to add a new row.

8. Assign the Admin role.

9. Click Submit to save.

10.Repeat the same process to create four ACLs for the specified fields.

Conclusion

The Ticket Assignment Automation System provides a structured, intelligent, and scalable approach to handling customer support operations. By implementing auto-assignment rules, relationships, and dashboards, the system ensures:

- Faster response times
- Balanced workloads
- Improved SLA compliance
- Higher customer satisfaction

This project demonstrates how automation and AI can transform IT workflows into efficient, error-free, and customer-centric processes.

Team

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