

ServiceNow Project Report

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Team size:4

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Project title: **Streamlining Ticket Assignment for Efficient Support Operations**

Project summary:

The goal of this initiative at ABC Corporation is to deploy an automated ticket routing system that streamlines support operations by directing tickets to the right teams. This will help resolve issues faster, boost customer satisfaction, and make better use of support resources.

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Users

1. Go to **All Applications**, then use the search bar to find **Users**.
2. Under **System Security**, choose **Users**.
3. Hit the **New** button to start creating a user profile.
4. Enter the required information to set up the new user account.

The screenshot shows the ServiceNow user profile page for 'mannie niranjan'. The form is divided into two main sections. The left section contains fields for User ID (mannie.niranjan), First name (mannie), Last name (niranjan), Title, Department, Password needs reset, Locked out, Active (checked), and Internal Integration User. The right section contains fields for Email (niranjanreddymannie2507@gmail.com), Identity type (Human), Language (-- None --), Calendar integration (Outlook), Time zone (System (America/Los_Angeles)), Date format (System (yyyy-MM-dd)), Business phone, Mobile phone, and Photo (Click to add...). Below the form are buttons for Update, Set Password, and Delete. At the bottom, there are links for Related Links (View linked accounts, View Subscriptions, Reset a password) and a table with tabs for Entitled Custom Tables, Roles (1), Groups (1), Delegates, Subscriptions, and User Client Certificates.

- 5.
6. Click on submit

Create another user with the following details

The screenshot shows the ServiceNow user profile page for 'katherine pierce'. The form is divided into two main sections. The left section contains fields for User ID (katherine.pierce), First name (katherine), Last name (pierce), Title, Department, Password, Password needs reset, Locked out, Active (checked), and Internal Integration User. The right section contains fields for Email, Identity type (Human), Language (-- None --), Calendar integration (Outlook), Time zone (System (America/Los_Angeles)), Date format (System (yyyy-MM-dd)), Business phone, Mobile phone, and Photo (Click to add...). Below the form are buttons for Update, Set Password, and Delete. At the bottom, there are links for Related Links (View linked accounts, View Subscriptions, Reset a password) and a table with tabs for Entitled Custom Tables, Roles (1), Groups (1), Delegates, Subscriptions, and User Client Certificates.

7. Click on submit

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Create Groups

1. Navigate to **All Applications** and use the search bar to find **Groups**.
2. Under **System Security**, click on **Groups**.
3. Select the **New** option to begin creating a group.
4. Enter the necessary information to set up the new group.

ServiceNow interface showing the 'Group - certificates' form. The form includes fields for Name, Manager, Group email, Parent, and Description. Below the form is a table with one row showing the group's role as 'Certification_role' and 'Inherits' as 'true'.

Created	Role	Granted by	Inherits
2025-09-05 02:48:45	Certification_role	(empty)	true

1. Click on submit

ServiceNow interface showing the 'Group - Platform' form. The form includes fields for Name, Manager, Group email, Parent, and Description. Below the form is a table with one row showing the group's role as 'Platform_role' and 'Inherits' as 'true'.


Created	Role	Granted by	Inherits
2025-09-05 02:50:53	Platform_role	(empty)	true

1. Create one more group: Create another group with the following details
2. Click on submit

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Create roles

1. Start by opening **ServiceNow**.
2. Go to **All Applications** and type **Roles** into the search bar.
3. Under **System Security**, click on **Roles**.
4. Press the **New** button to begin setting up a role.
5. Complete the required fields to define and create the new role.
6. Would you like me to help format this into a training guide or SOP document?

Name	Certification_role	Application	Global	
Requires Subscription	Unspecified	Elevated privilege	<input type="checkbox"/>	
Description	Can deal with certification issues			

7.

8. Click on submit

Create one more role:

Create another role with the following details

Name	Platform_role	Application	Global	
Requires Subscription	Unspecified	Elevated privilege	<input type="checkbox"/>	
Description	Can deal with platform related issues			

Click on submit

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Create Table

1. Open ServiceNow.
2. Go to All Applications and search for Tables.
3. Under System Definition, select Tables.
4. Click New to start creating a new table.
5. Enter the following details:
6. Set the Label to *Operations related*.
7. Make sure to check both Create module and Create mobile module options.
8. In the New Menu Name field, enter *Operations related*.
9. Add the necessary columns to define the structure of your table.
10. Would you like help drafting sample column names or deciding what kind of data this table should hold?

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...				

11.

12. Click on submit

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

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

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Assign role to table

1. Navigate to **All Applications** and search for **Tables**.
2. Open the **Operations Related** table.
3. Go to the **Application Access** section.
4. Select the **Read operation** for `u_operations_related`.
5. Click your **profile icon** in the top-right corner.
6. Choose **Elevate Role**.
7. Select **Security Admin**, then click **Update**.
8. In the **Requires Role** section:
 1. Double-click to add a new row.
 2. Enter the **Platform role**.
 3. Add the **Certificate role** as well.
9. Click **Update** to save the changes.

Access Control
u_operations_related

Definition

Access Control Rules allow access to the specified resource if *all three* of these checks evaluate to true:

1. The user has one of the roles specified in the **Role** list, or the list is empty.
2. Conditions in the **Condition** field evaluate to true, or conditions are empty.
3. The script in the **Script** field (advanced) evaluates to true, or sets the variable "answer" to true, or is empty.

The three checks are evaluated independently in the order displayed above.

[More Info](#)

Requires role

Role
✗ u_operations_related_user
✗ Platform_role
✗ Certification_role
+ Insert a new row...

- 10.
11. Click on `u_operations_related` write operation
12. Under **Requires role**
13. Double click on insert a new row
14. Give platform role
15. And add certificate role

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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

The screenshot shows the 'Access Control' form in ServiceNow. The breadcrumb trail is 'Access Control > u_operations_related.u_service_request_no'. The form fields are as follows:

- * Type: record
- * Operation: write
- Application: Global
- Active: ☒
- Admin overrides: ☒
- Advanced: ☐
- Protection policy: -- None --
- * Name: Operations related [u_operations_related] (dropdown), Service request No (dropdown)
- Description: (empty text area)
- Condition: 4 records match condition (with a help icon)
- Buttons: Add Filter Condition, Add "OR" Clause
- Footer: -- choose field -- (dropdown), -- oper -- (dropdown), -- value -- (text input)

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

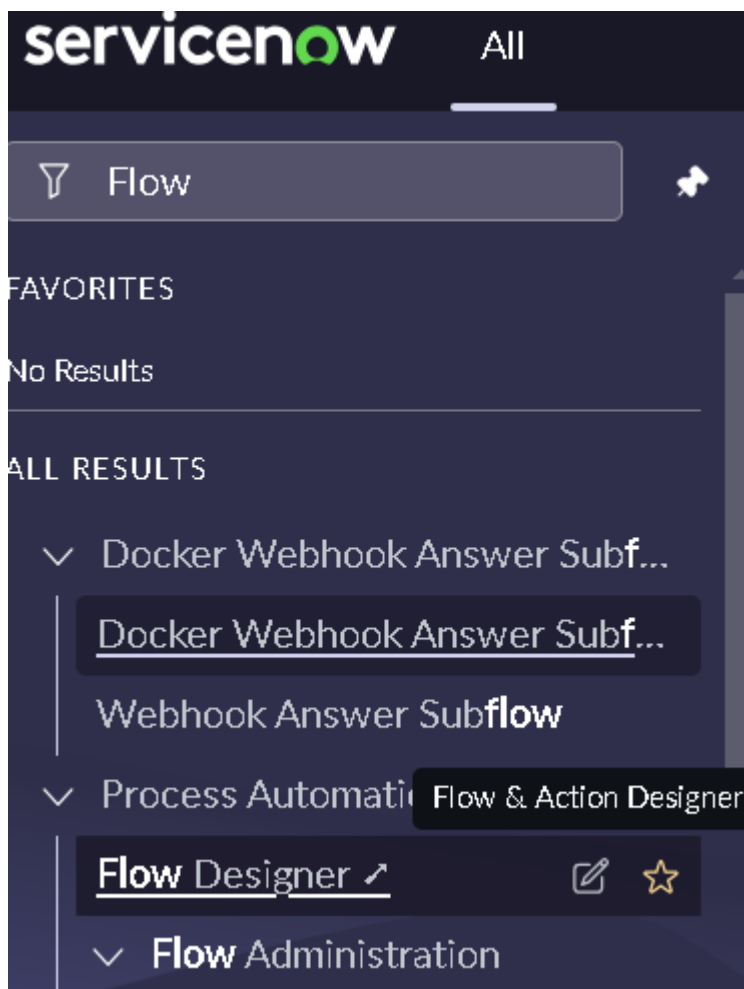
<input type="checkbox"/>	<input type="text" value="u_operations_related.u_priority"/>	write	record	true	admin	2024-04-16 22:32:12
	u_operations_related.u_ticket_raised_date	write	record	true	admin	2024-04-16 22:30:22
	u_operations_related.u_name	write	record	true	admin	2024-04-16 22:29:00
	u_operations_related.u_issue	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

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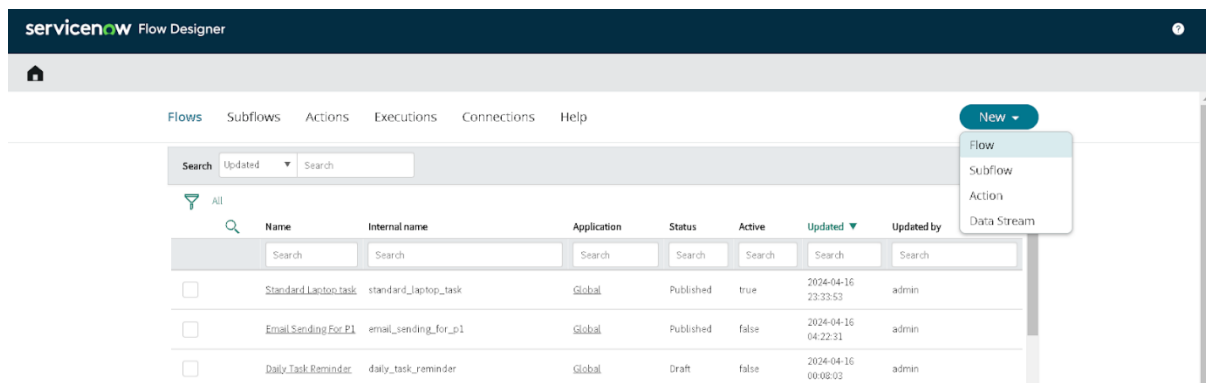
Create a Flow to Assign operations ticket to group:

1. Navigate to **All Applications** and search for **Flow Designer**.
2. Open **Flow Designer** under the **Process Automation** section.
3. Click **New**, then choose **Flow** to start building a new flow.
4. In the **Flow Properties**, name the flow "**Regarding Certificate**".
5. Set the **Application** to **Global**.
6. Choose **System User** as the **Run User**.
7. Click **Submit** to save and create the flow.

Would you like help adding actions or conditions to this flow next?



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Flow properties

* Flow name: Regarding certificates

Description: Describe your flow

Application: Global

Protection: -- None --

Run As: System User

Cancel 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

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Value : Regrading Certificates

5. After that click on Done.

The screenshot shows the 'TRIGGER' configuration window in ServiceNow. The title bar reads 'Operations related Created or Updated (Trigger: Created or Updated regarding certificates)'. The configuration includes:

- Trigger:** A dropdown menu set to 'Created or Updated'.
- Table:** A dropdown menu set to 'Operations related [u_operations_related]'.
- Condition:** A section titled 'All of these conditions must be met' containing a single condition: 'Issue' (dropdown) 'is' (operator) 'Regarding certificates' (dropdown). There are 'OR' and 'AND' buttons to the right.
- Run Trigger:** A dropdown menu set to 'For every update'.
- Buttons:** 'Delete', 'Cancel', and 'Done' buttons are at the bottom right.

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.

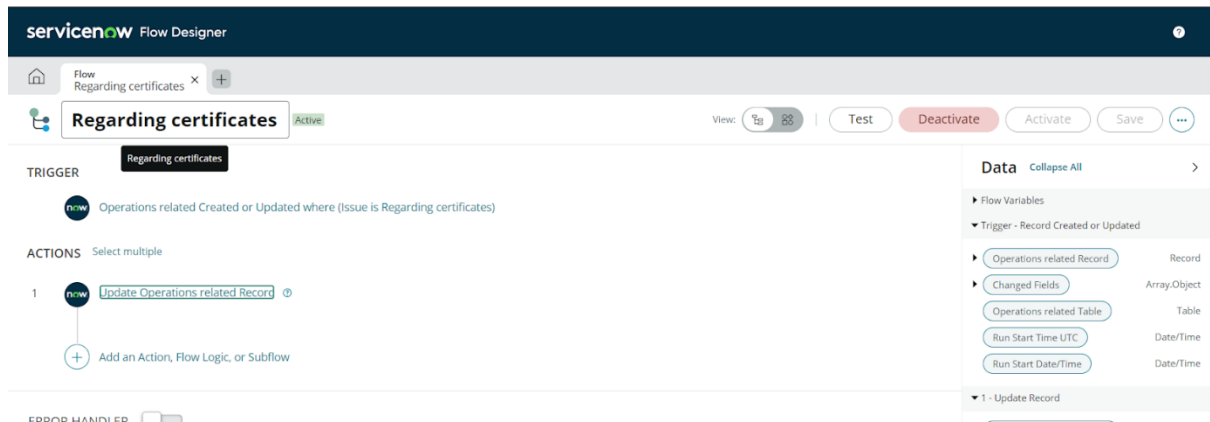
14. Click on Save to save the Flow.

15. Click on Activate.

The screenshot shows the 'ACTIONS' configuration window in ServiceNow. The title bar reads 'Update Operations related Record'. The configuration includes:

- Action:** A dropdown menu set to 'Update Record'.
- Record:** A field set to 'Trigger ... > Operations relate...'.
- Table:** A dropdown menu set to 'Operations related [u_operations_related]'.
- Fields:** A section containing a field 'Assigned to group' with a value 'certificates'.
- Buttons:** 'Delete', 'Cancel', and 'Done' buttons are at the bottom right.

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Conclusion:

The implementation of an automated ticket routing system at ABC Corporation marks a strategic leap toward operational excellence in customer support. By intelligently directing tickets to the appropriate teams, this initiative not only accelerates issue resolution but also enhances customer satisfaction and optimizes resource utilization. As support teams become more focused and responsive, ABC Corporation is poised to deliver a more seamless and efficient service experience—laying the groundwork for scalable growth and long-term customer loyalty.