knowledge14
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# Lab Guide

## Incident 201:

## Proactive Major Incident Management with Notify

Michael Ritchie & Chris McGrath

Lab instance: https://**<<name>>**.lab.service-now.com

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

# Lab Goal

Enable Plugins in support of this lab.

**Lab 1**
**Enable Plugins**

## Log on to Your Training Instance

1. **Immediately upon arrival**, begin working through the pre-lab setup instructions on the first couple of pages. These steps will take 15-20 minutes and can be running during the introductory presentation part of the lab. Log on with **admin** credentials. Include periods at the end of your steps.
2. Your instance URL is on the cover page.
3. Login using the **admin** credentials provided on the cover.

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## Install Prerequisite Plugins

Incident Alert Management, Notify, and On-call Rotation are applications that are not enabled by default in a new customer instance. This is done via plugins. Each of these plugins may in turn install other prerequisite plugins.

During this lab you will enable the following Plugins:

- Notify
- On-Call Scheduling
- Incident Alert Management




1. Look for the filter search box on the left side of your browser window just below “Welcome: System Administrator”. Type **plugins**. This will filter your list of applications and modules to show you the item(s) you are looking for.

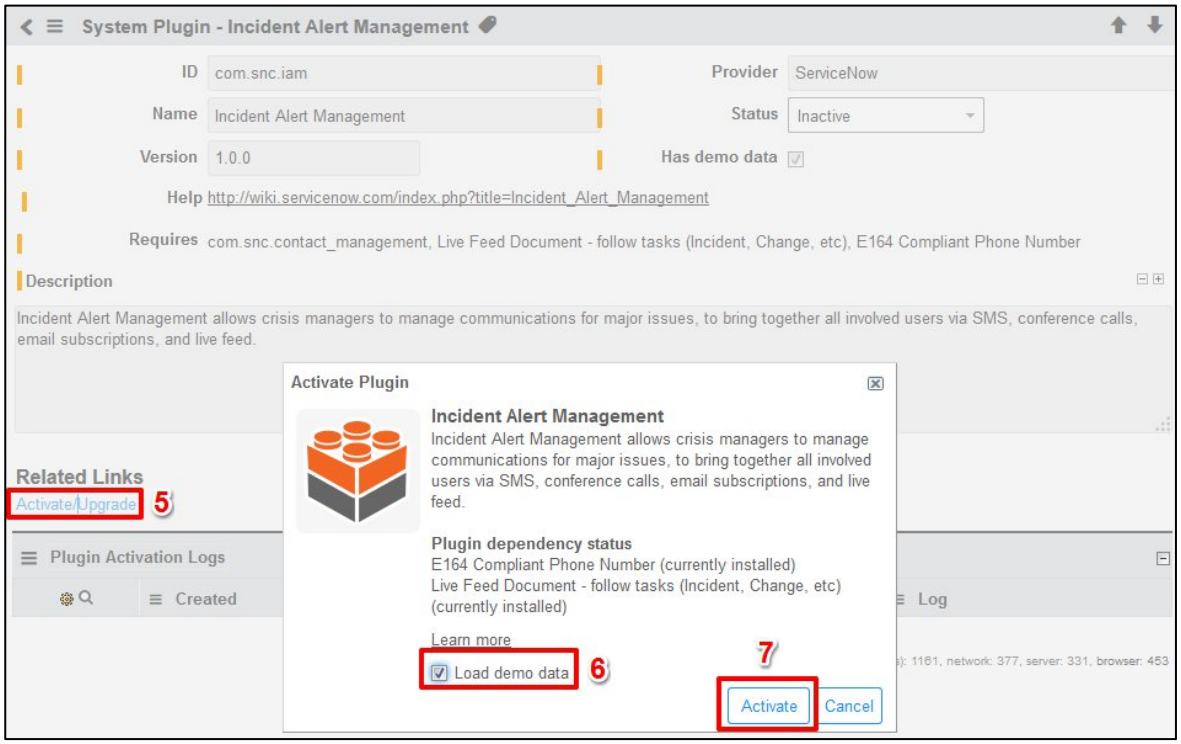
2. In your filtered list, select the **Plugins** module. This will show you all available plugins. Some are already installed by default. These will be listed as “Active”.

3. Using the list search at the top middle of your screen, search where Name is **Incident Alert Management**.

4. Once you find it, click the underlined word **Incident Alert Management.**

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5. Click the Related Link at the bottom of your screen to **Active/Upgrade** the plugin.




6. A dialog box will pop up to describe the plugin and give you the option to have demo data installed as well. Select the option to **Load demo data**, if this option is presented. Notify for example does not have demo data.

7. Click the **Activate** Button to begin the plugin installation process. This process can take from a couple of minutes to as much as 10-15 minutes depending on the plugin. Please be patient.

8. You can only enable one plugin at a time in a browser. You can open another browser and enable the next plugin there.

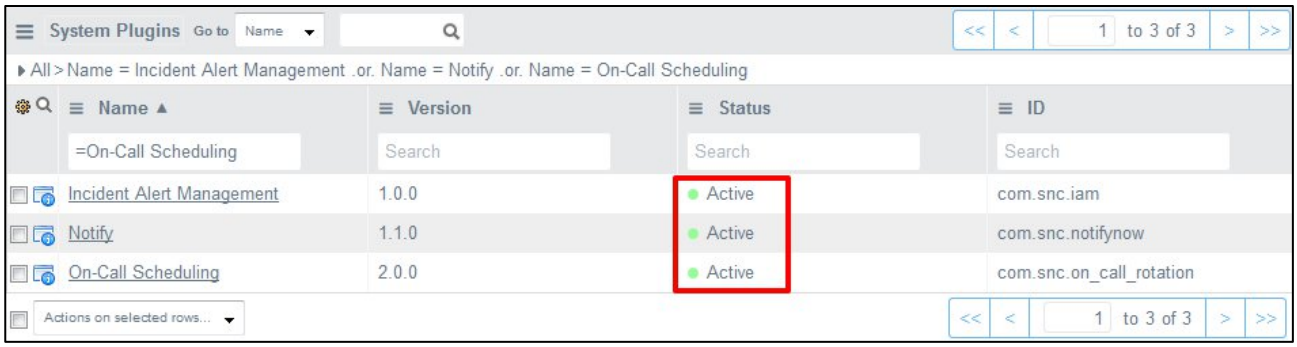
9. Once the plugin is finished activation and you get a green State of Complete, click **Plugin List under Next steps** and repeat this for the two remaining plugins. Be sure to select the demo data option for each plugin you install if applicable.

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## Lab Success Verification

1. The following plugins should have an Active Status:

   Incident Alert Management
   Notify
   On-Call Scheduling




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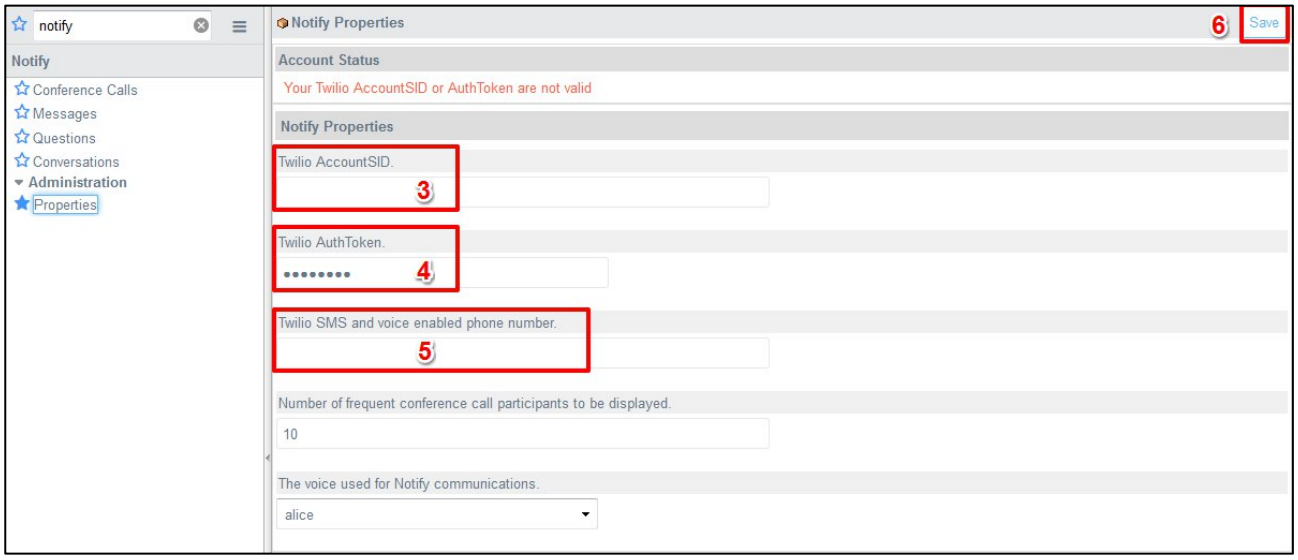
# Lab Goal

Setup the Notify Plugin.

**Lab 2**
**Setup**
**Notify**

## Setup the Notify Plugin with Twilio Account

1. In the Filter Text box, type **notify**.
2. Click **Properties** in the Notify Application under Administration.

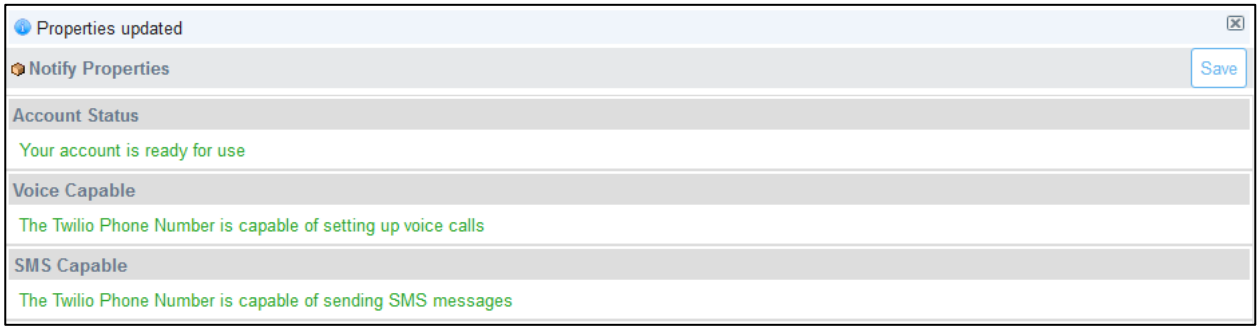



3. Enter the **Twilio AccountSID** provided by your instructor.
4. Enter the **Twilio AuthToken** provided by your instructor.
5. Enter the **Twilio SMS and voice enabled phone number** provided by your instructor. Please make sure you enter it using the **+1828XXXXXX** format.
6. Click **Save** in the upper right side.

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## Lab Success Verification

1. After the properties have been saved, you should get several messages confirming a successful setup.




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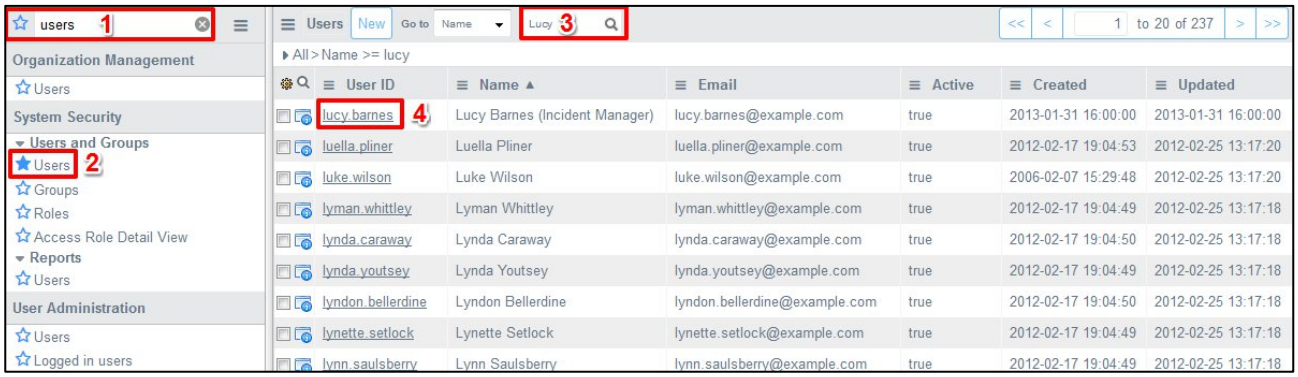
# Lab Goal

Notify requires that phone numbers be in E.164 format. The Dublin release has a new field type of Phone Number (E.164). In this lab we will change the user record Mobile Phone field type to Phone Number (E.164) and update an out of the box user with your mobile phone.

**Lab 3**
**Update User**

## Update User Record Mobile Phone field type and enter mobile phone

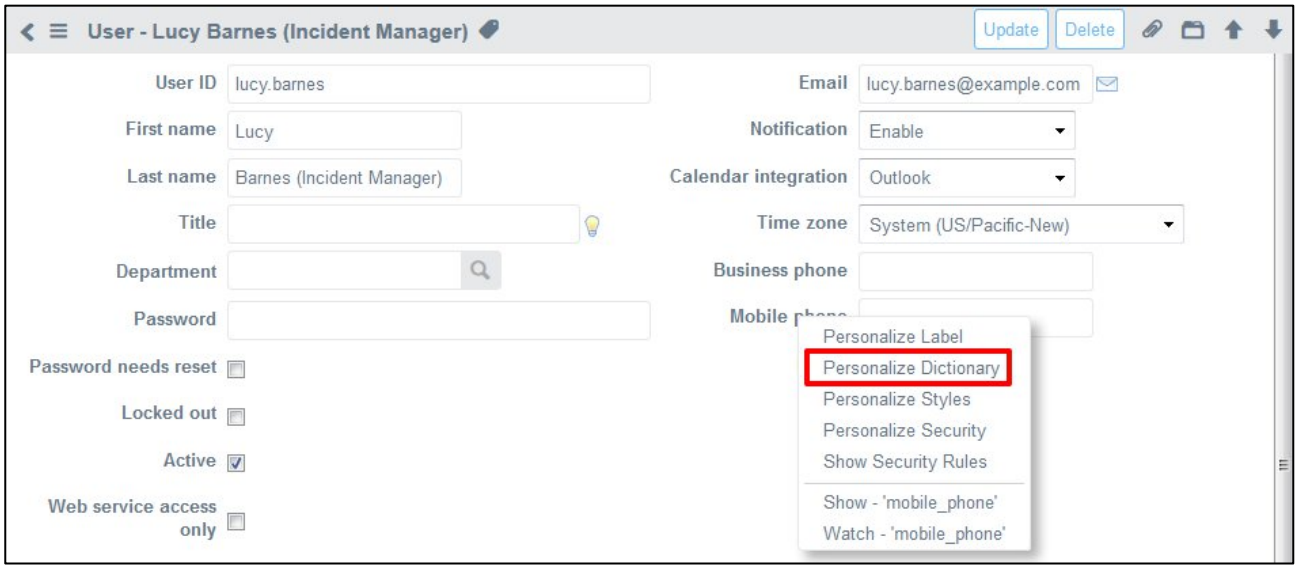
1. In the Filter Text box, type **users**.



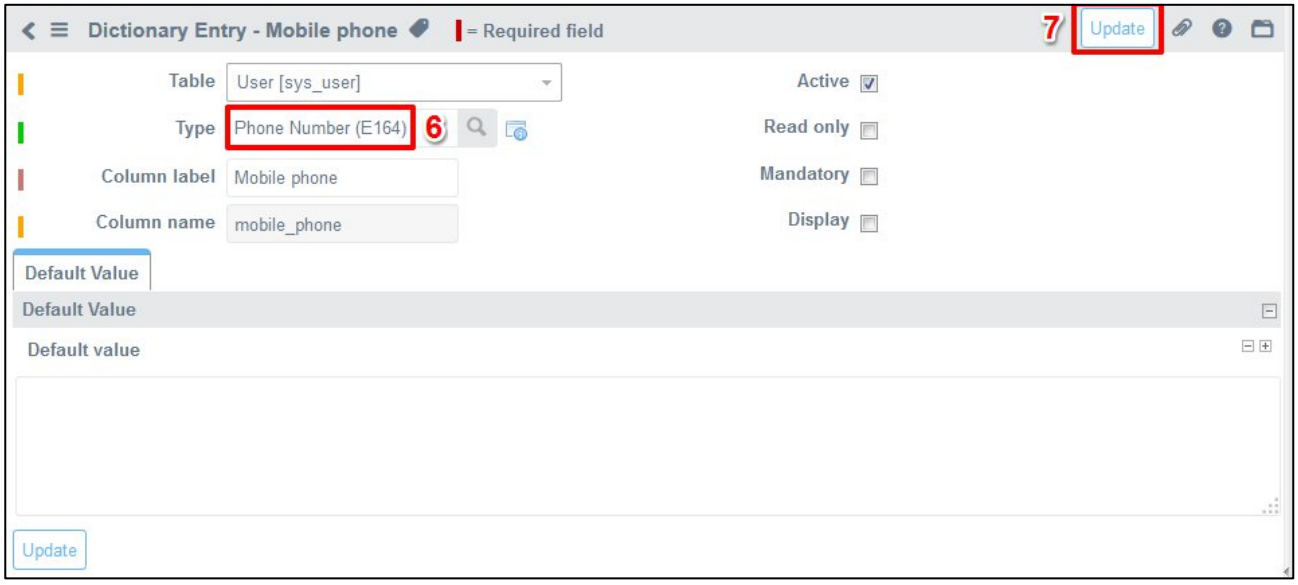

2. Select **Users** under the System Security application.
3. Using the list search at the top middle of your screen, search where Name is **Lucy Barnes**.
4. Click **lucy.barnes** in the list.

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5. Twilio requires that phone numbers be in E.164 format. When Lucy Barnes' user record appears, right click the Mobile phone label and choose **Personalize Dictionary**.




6. Change the type of this field from Phone Number to **Phone Number (E164)**.




7. Click **Update**.

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8. Now that the Mobile phone field is of type E.164, a new select box containing regions will appear next to the Mobile phone label. Choose the region from where you are from and enter your mobile number in the field beside it. Format shouldn't matter as ServiceNow will automatically correct it to the proper format with next step.

9. Once you click out of the mobile number field, ServiceNow will convert it to the proper format.

10. Click **Update** to save Lucy's user record.

11. Now we need to update one more user that we will use later in the Lab. Using the list search at the top middle of your screen, search where Name is **Beth Anglin**.

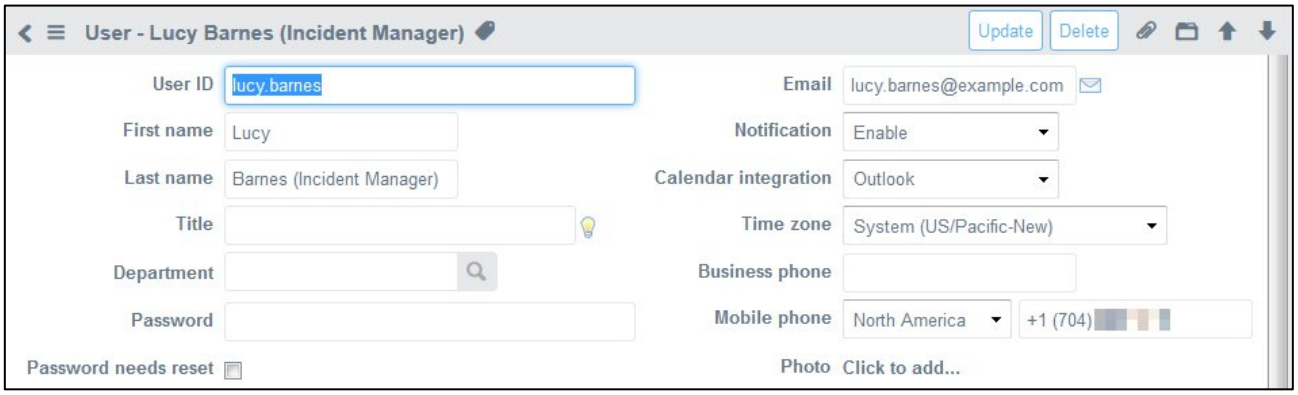
12. Click **beth.anglin** in the list.

13. In the Mobile phone field, choose the region from where you are from and enter your mobile number in the field beside it. Once you click out of the mobile number field, ServiceNow will convert it to the proper format.

14. Click **Update** to save Beth's user record.

## Lab Success Verification

1. Lucy Barnes' and Beth Anglin's user records have been updated with your mobile phone.




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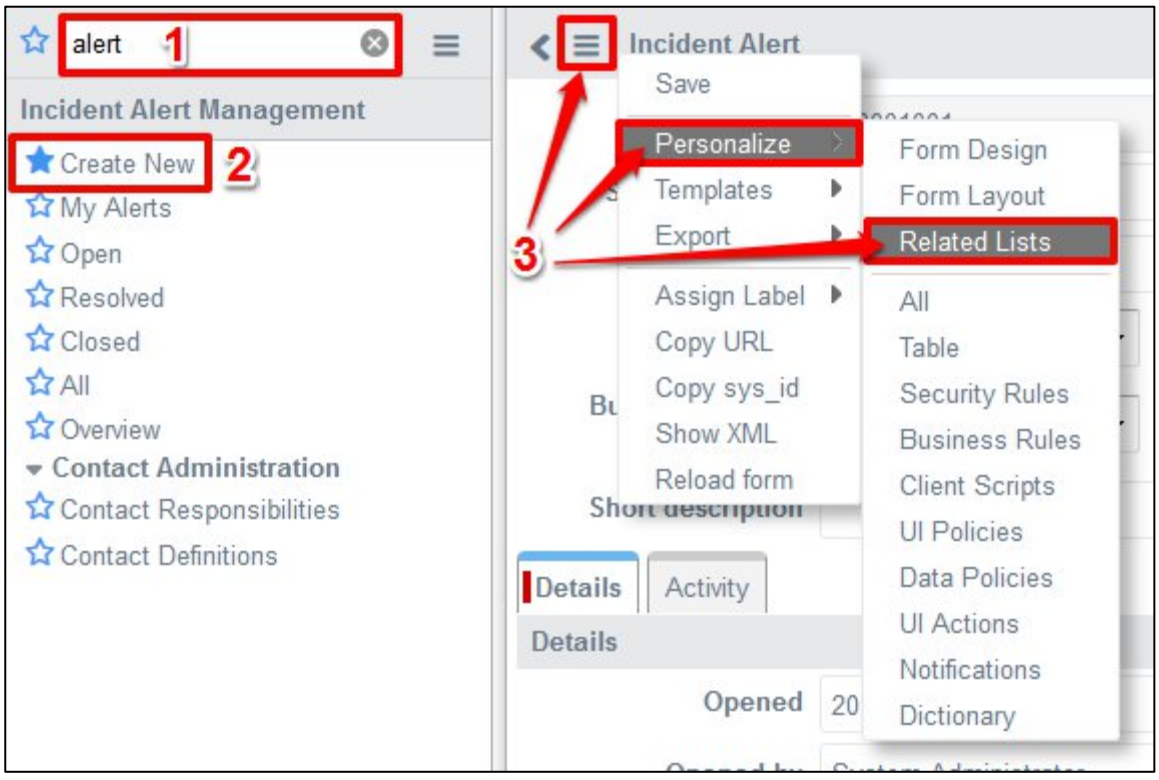
# Lab Goal

Add two related lists to the bottom of the Incident Alert form so that you can view SMS and Voice Calls associated with an Incident Alert Record.

**Lab 4**
**Modify Incident Alert Form**

## Modify Incident Alert Related Lists

1. In the Filter Text box, type **alert**.



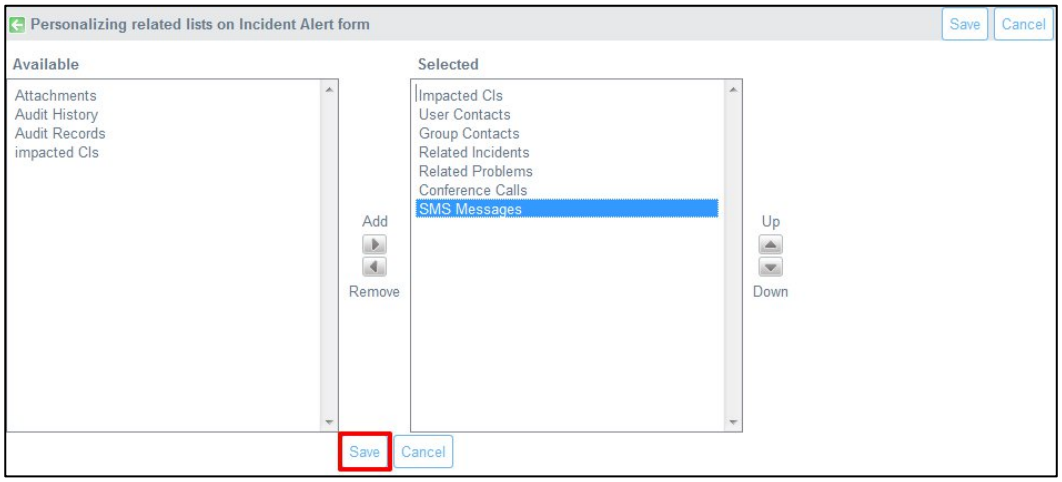

2. Click **Create New** under the Incident Alert Application.

3. Click the **Additional actions** icon, then **Personalize**, and finally **Related Lists**.

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4. When the slush bucket appears, double-click on **Conference Calls** on the left Available side to move it over to the Selected side. Repeat for **SMS Messages**.

5. Click **Save**.




## Lab Success Verification

1. After clicking **Save** above, you should be taken back to a blank Incident Alert Record.

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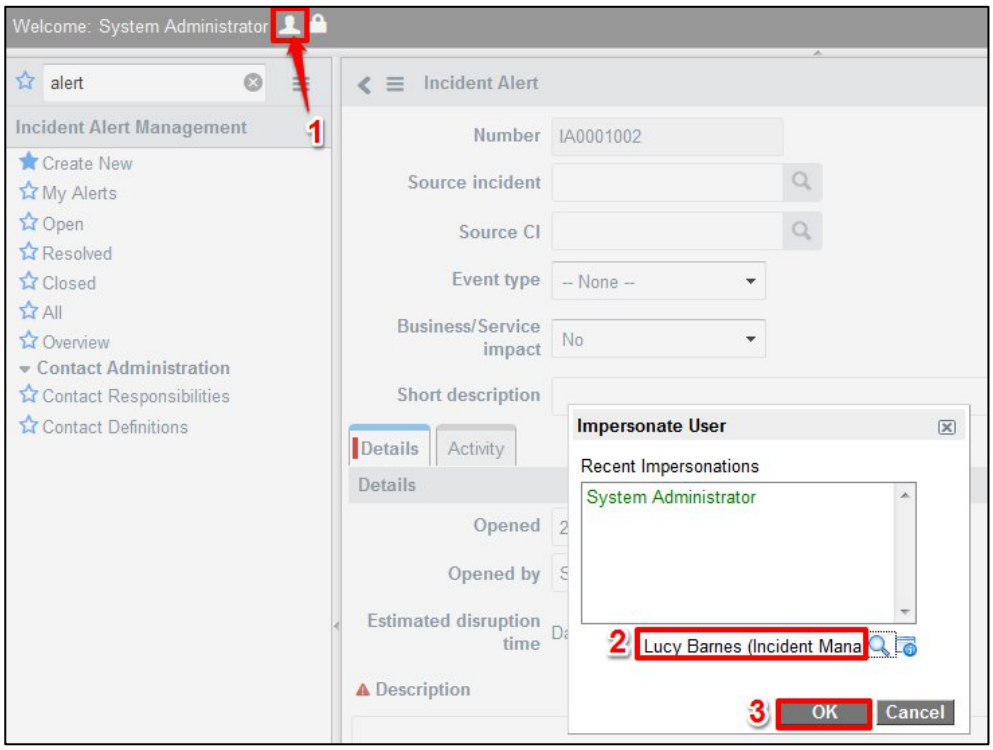
# Lab Goal

Lucy Barnes is an Incident Manager and she wants to review existing incidents to determine if any Major Incidents are occurring. She decides to open an Incident Alert to communicate the outage and get the right people involved.

**Lab 5**
**Create Incident Alert**

## Create an Incident Alert from an existing incident

1. Login as Lucy Barnes by clicking **Impersonate User**.




2. Once the Impersonate User dialog appears, type **Lucy Barnes** and select her in the drop down.

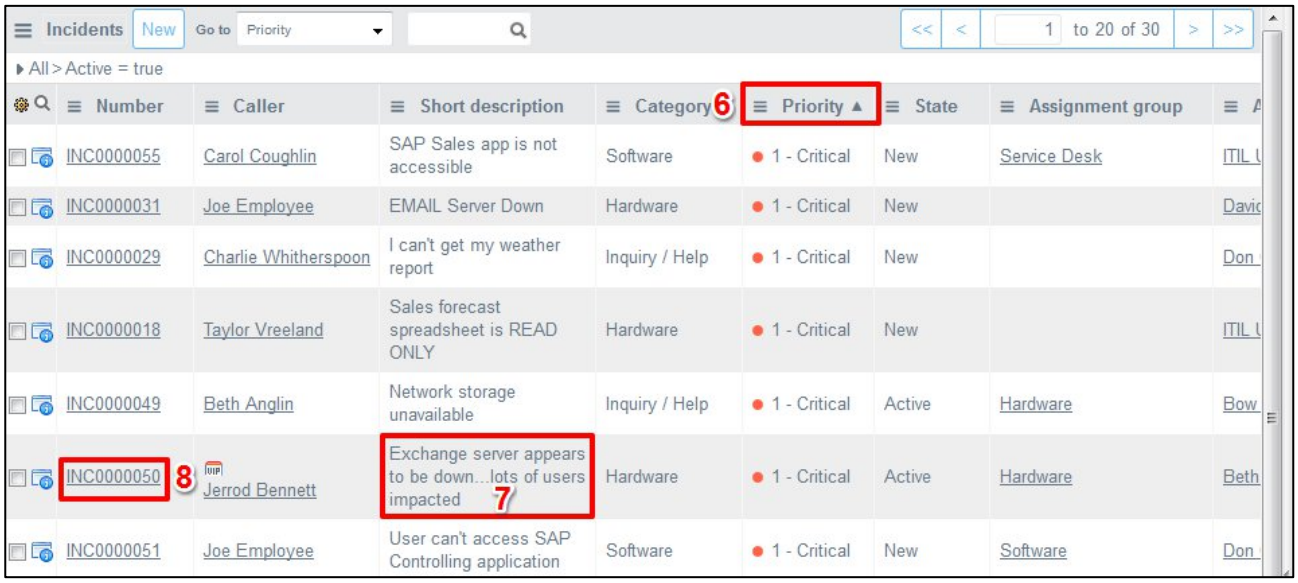
3. Click **OK**.

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4. Once you are logged in as Lucy, in the Filter Text box, type **incident**.

5. Click **Open** under the Incident Application.

6. Lucy wants to focus on Critical Priority incidents. This can be done by several methods in ServiceNow, but click the **Priority** column heading to sort the list with **1-Critical Priority** incidents at the top of the list.

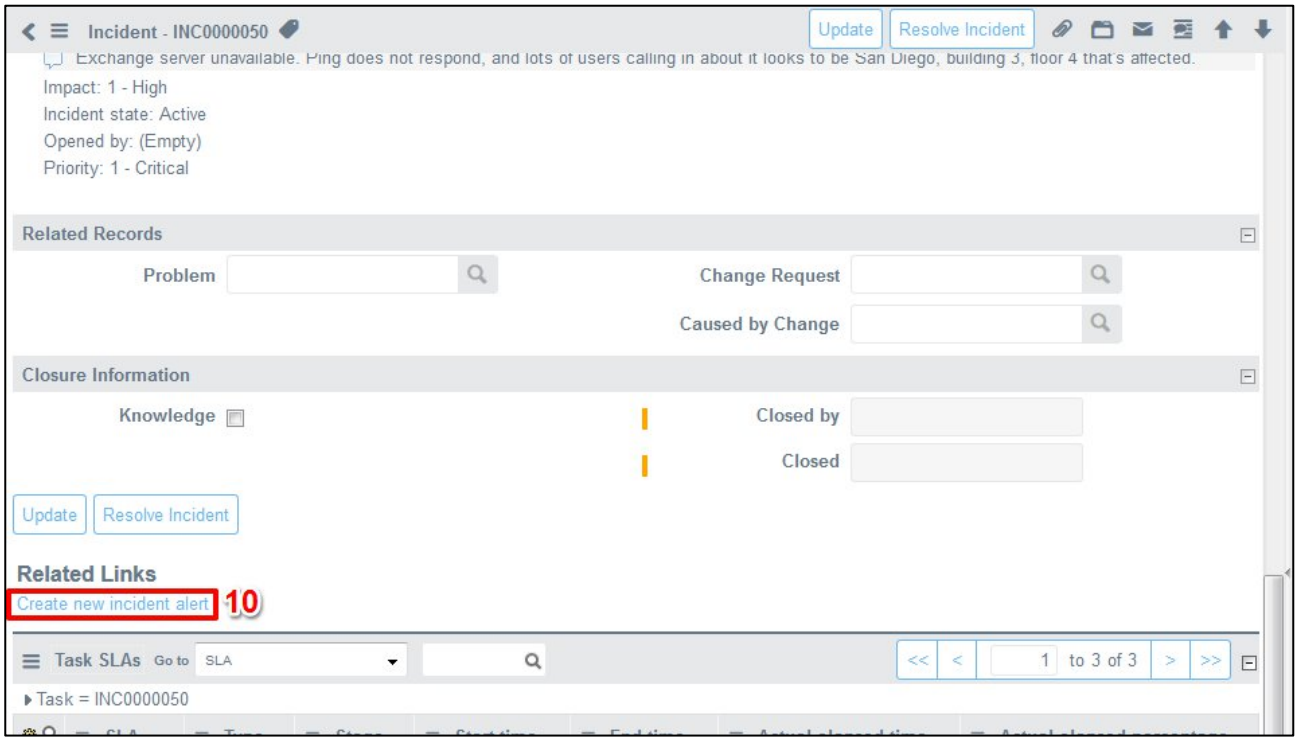



7. Lucy notices that the Exchange server has been reported down in Incident I**NC0000050**.

8. Click **INC0000050** in the list.

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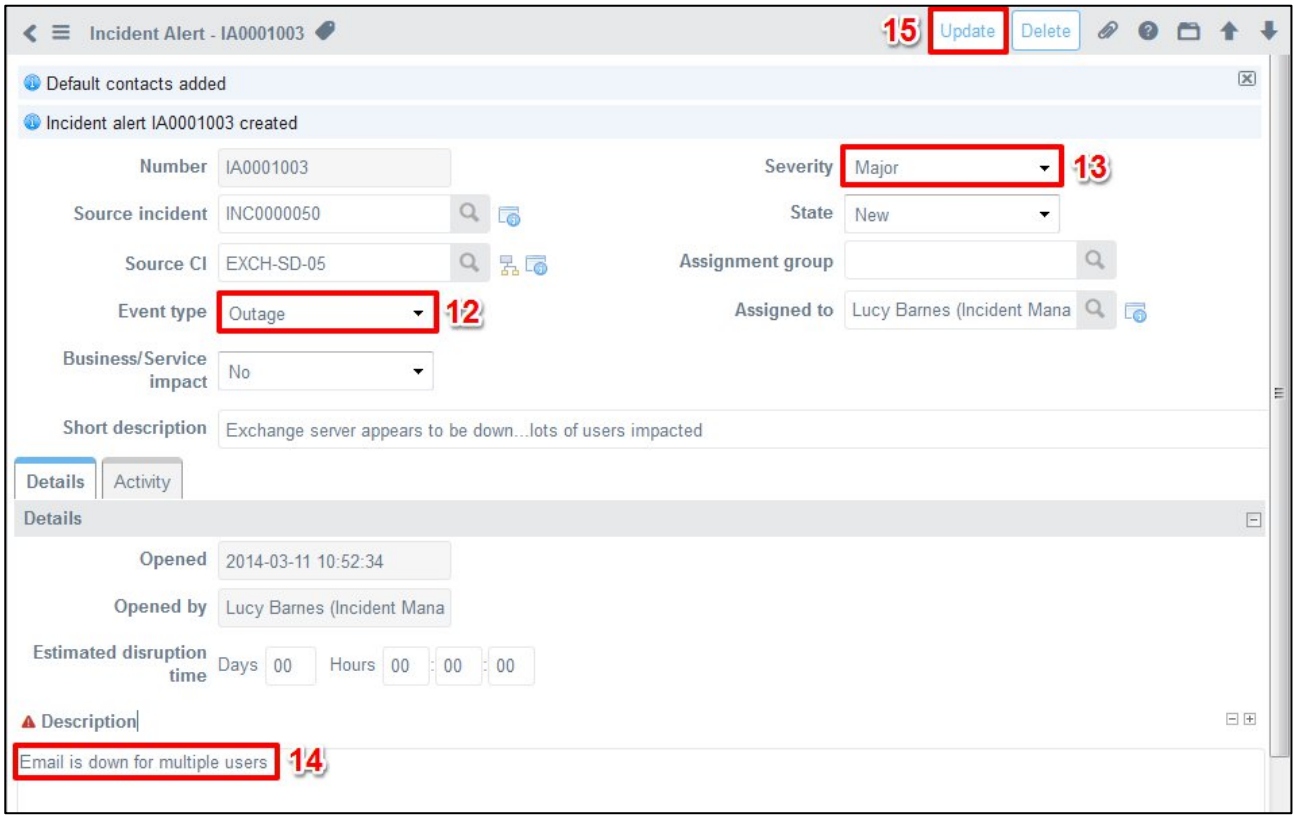
9. Lucy notices that the server is unavailable and multiple users are impacted by this incident. She wants to create an Incident Alert for this incident to communicate this outage. Scroll down until you see the **Related Links** just above the Task SLAs list.




10. Click **Create new incident alert**.

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11. Once the Incident Alert record has been created, notice the Source Incident, Source CI, and Short Description are copied over from INC0000050. Now details about the Incident Alert need to be set.




12. Set the Event type to **Outage**.

13. Set the Severity to **Major**.

14. Set the Description to **Email is down for multiple users**.

15. Click **Update**.

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16. What happened while you were updating the Incident Alert? Did you get a SMS message? You should have received one similar to the following.




17. Scroll down to the bottom of the Incident and click **Show related incident alert**. Incidents can only be linked to one Incident Alert, but an Incident Alert can have many incidents linked to it.

18. Go to the Activity section (click the **Activity** tab). Notice all the updates that were done in the previous step were captured as an activity. Also notice that there is an activity stating "Sent SMS to Lucy Barnes (Incident Manager)".

19. Now scroll down to the bottom of the Incident Alert. Go to the Impacted CIs section (or click the **Impacted CIs** tab, if tabs enabled). Notice that all of the business services that are dependent on the **EXCH-SD-05** CI have automatically been listed. This leverages the CMDB relationship hierarchy.

20. Now go to the User Contacts section (or click the **User Contacts** tab, if tabs enabled) and notice that Lucy Barnes is listed as the Incident Manager for this Incident Alert. Incident Alert has contact responsibilities where Users and Groups can automatically be associated to an Incident Alert.

21. Now go to the Group Contacts section (or click the **Group Contacts** tab, if tabs enabled) and notice that several groups were added to this Incident Alert. Incident Alert has contact responsibilities where Users and Groups can automatically be associated to an Incident Alert.

**Note:** We will see an example on how these groups are utilized in Lab 7.

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22. Now go to the Related Incidents section (or click the **Related Incidents** tab, if tabs enabled) and notice that INC0000050 is listed automatically. Incident Alerts can have multiple Incidents associated to them. If INC0000050 was a parent of multiple incidents, the child incidents would also be listed here.

23. Now go to the SMS Messages section (or click the **SMS Messages** tab, if tabs enabled) and notice that the Incident Alert has a record of all SMS alerts that were sent from the Incident Alert. There is an out of the box business rule that sends a SMS to all of the contacts for an Incident Alert. The status of the SMS is also **Sent** because we received verification from Twilio that the message was successfully sent.

## Lab Success Verification

1. An incident alert was created and you successfully received a SMS from the Incident Alert.

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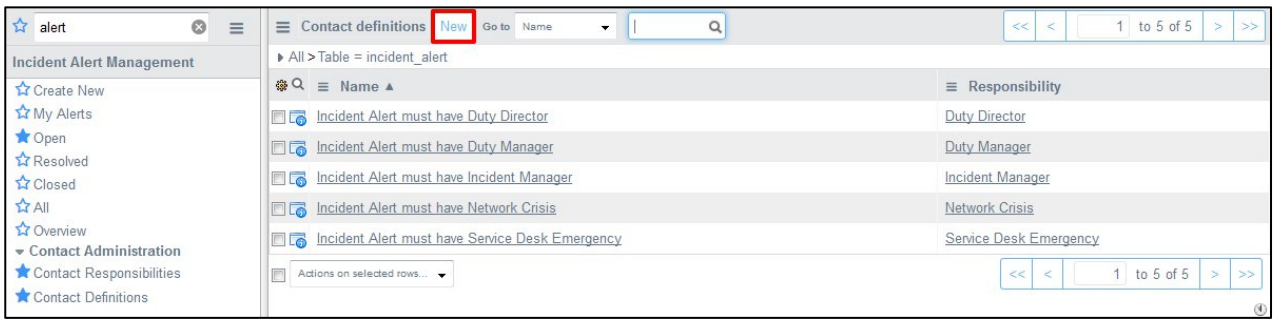
# Lab Goal

Create a new contact definition to add a Communications Manager to Incident Alerts that are of type Outage where the Severity is Major.

**Lab 6 Modify Contact Definitions**

## Create a new contact definition for Incident Alert

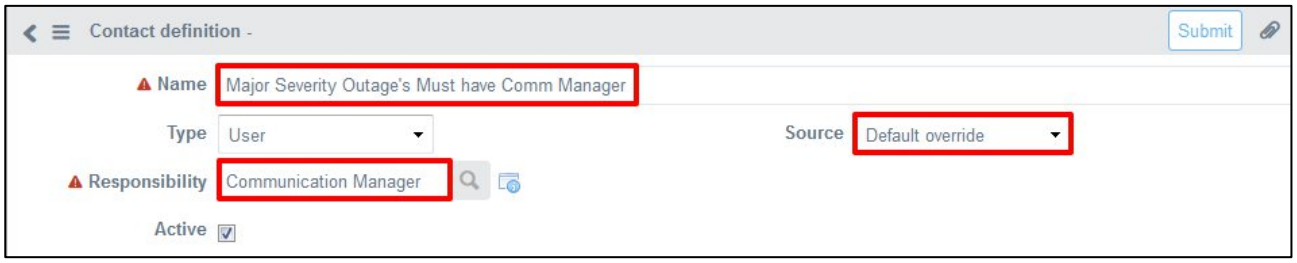
1. In the Filter Text box, type **alert**.
2. Click **Contact Responsibilities** in the Incident Alert Management application. This is a list of the out of the box Responsibilities included with the product. New contact responsibilities can easily be added by Administrators and Incident Alert Administrators.
3. Click **Contact Definitions**. Notice that ServiceNow has several out of the box contact definitions. We saw a demonstration of these when we created the incident alert in the previous exercise where a Duty Director, Incident Manager, and Duty manager were added along with the Service Desk Emergency and Network Crisis Groups.
4. Click **New**.




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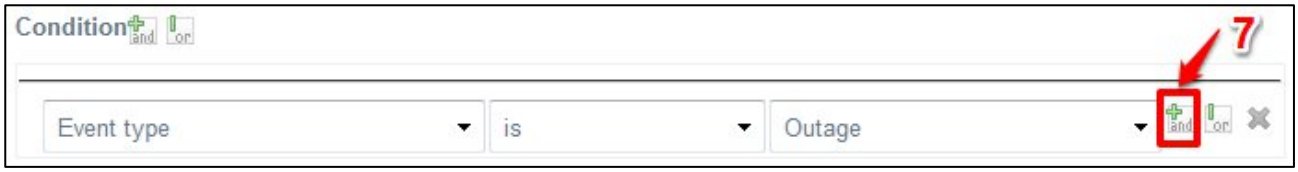
5. Enter the following Information:

   Name: **Major Severity Outage's Must have Comm Manager**
   Responsibility: **Communication Manager**
   Source: **Default override**

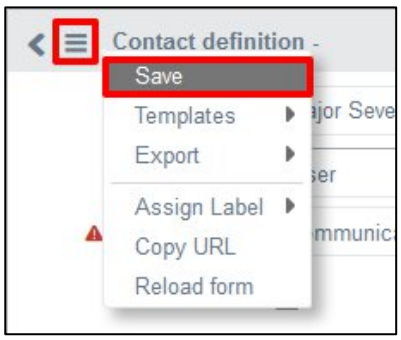



6. Let's add the condition to only add the Communication Manager if the Incident Alert type is Outage and the Severity is Major. In the condition, click **choose field** and select Event Type, leave the middle box set to "is", and click the right "None" select box and choose "Outage".

7. Now click the **and** button beside **Outage** to add another condition and repeat for Severity. Click choose field and select Severity, leave the middle box set to **is**, and click the right **None** select box and choose **Major**.

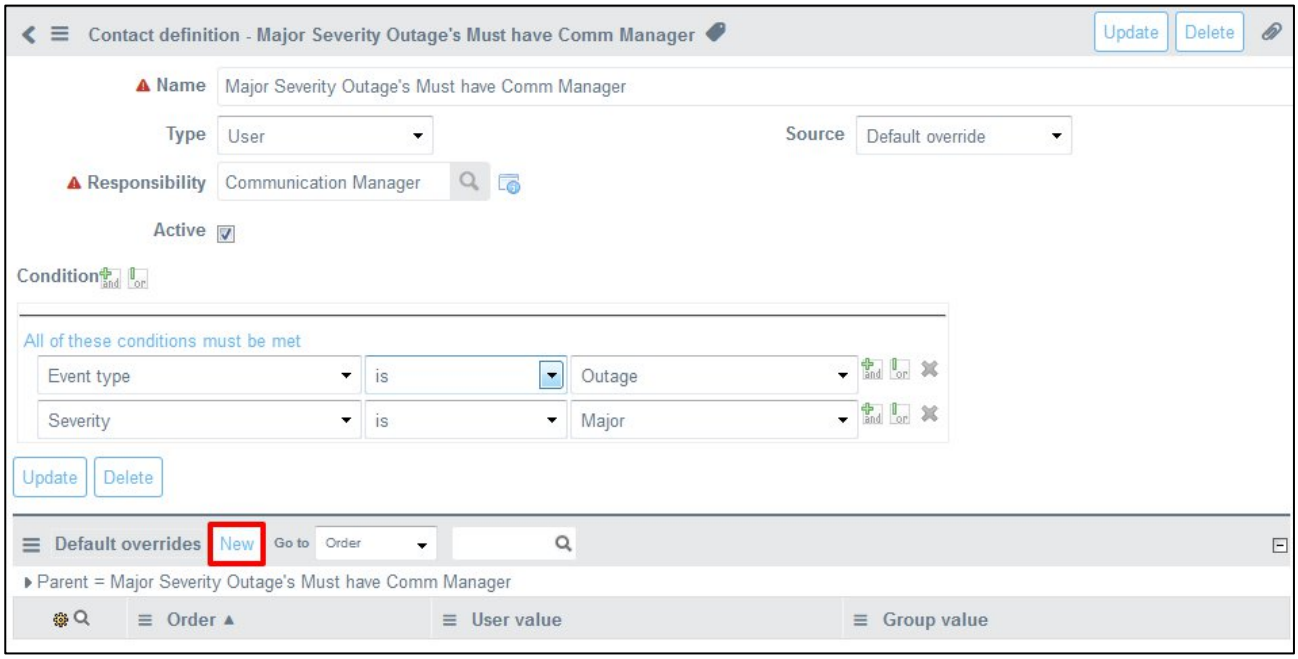



8. Click **Additional actions** and select **Save** so we can remain on this record.

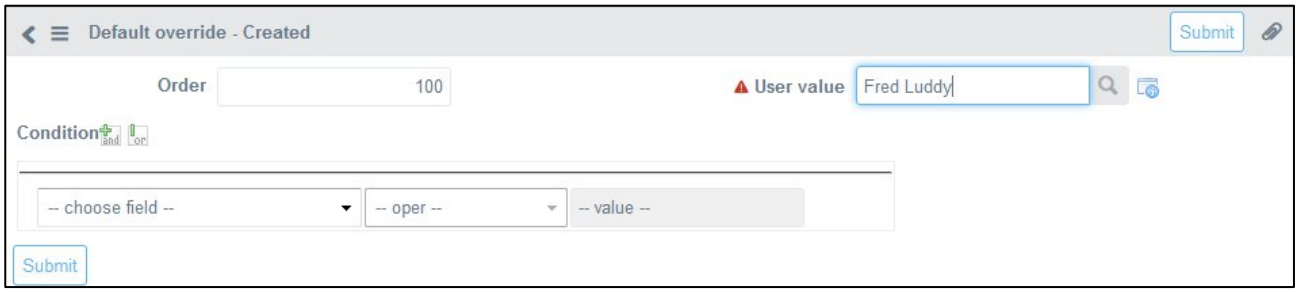



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9. Click **New** in the **Default overrides** section at the bottom of the form.

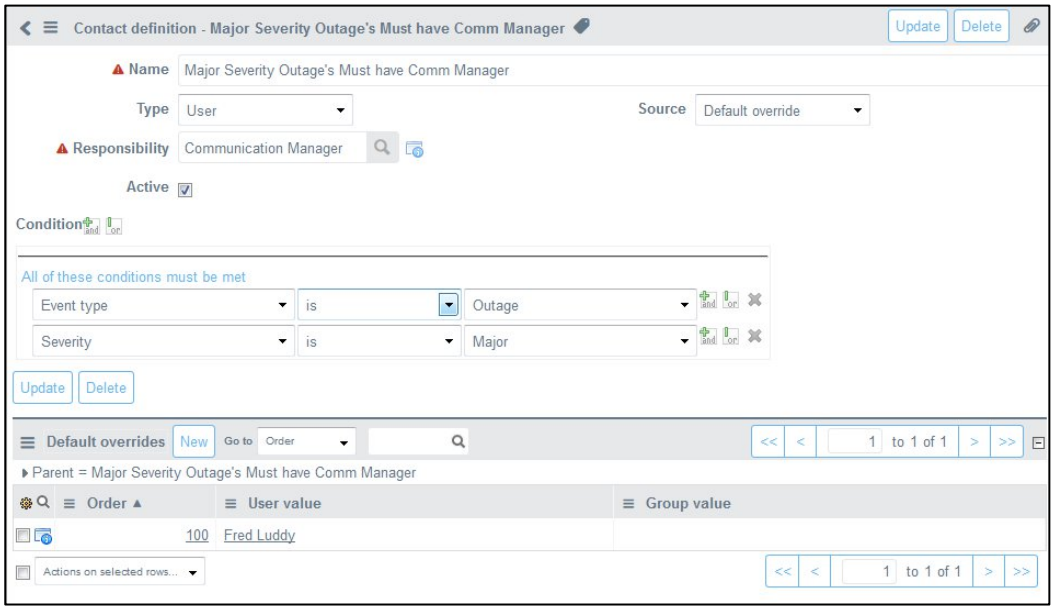



10. In the User value field, type **Fred Luddy** and then click **Submit**.




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11. Once this is set up, your Contact Definition should look like this:



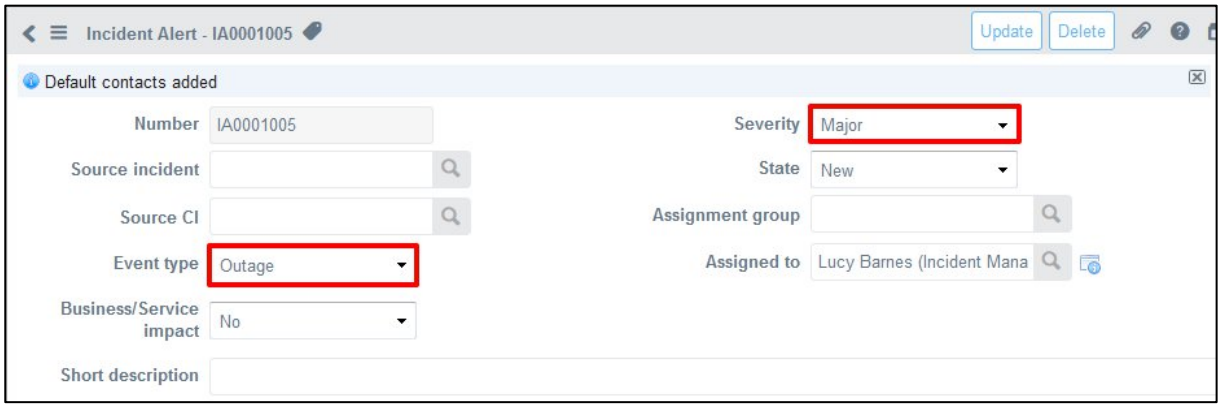

12. Now let's test this new rule. Click **Create New** in the Incident Alert Management application.

13. Leave all the default selections as they are, but enter some text in the required Description field. Then click Additional actions and select save so we can remain on the record. Note: Once a new Incident Alert is created you should get a SMS message.

14. Scroll down to the User Contacts section (click **User Contacts** tab) and notice that only the Duty Manager, Duty Director, and Incident Manager were added to this new Incident Alert.

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15. Scroll back up to the top and set the Event type to Outage and the Severity to Major. Then click **Additional actions and select save** so we can remain on this record.




16. Scroll down to the User Contacts section (click **User Contacts** tab) and notice that Fred Luddy the Communications Manager was added as a User Contact for this Incident Alert.

## Lab Success Verification

1. A new contact definition was added that successfully adds a Communication Manager to Major Severity Outage Incident Alerts.




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# Lab Goal

Incident Alert teamed up with Notify is a powerful combination. So far we have seen automated SMS messages on new Incident Alerts. Conference calls can also be initiated to bring the proper team together to discuss and resolve major issues.

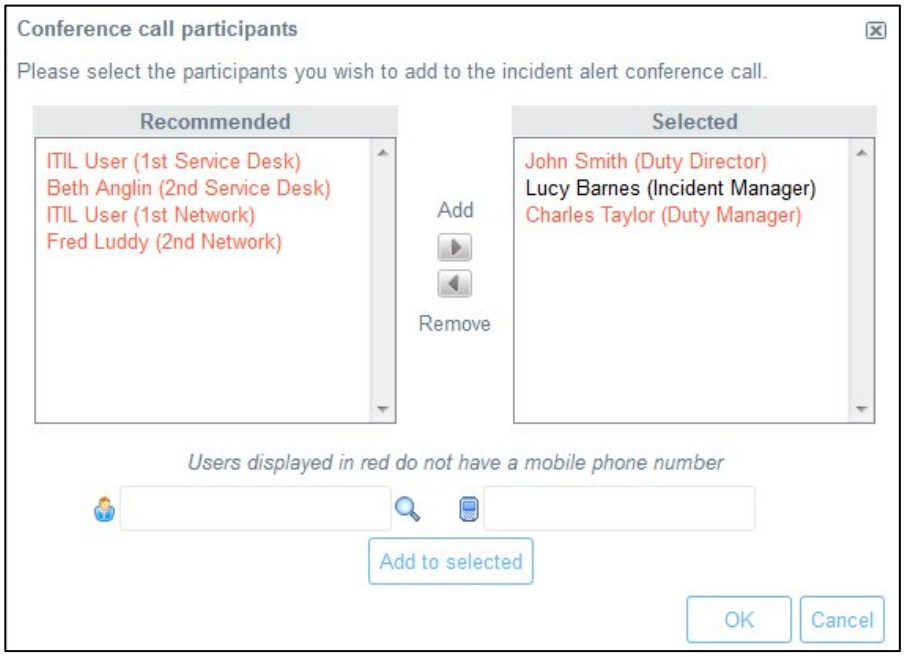
**Lab 7**
**Initiate Conference Call**

## Initiate a conference call from an existing Incident Alert

1. In the Filter Text box, type **alert**.
2. Click **Open** under the Incident Alert Management application.
3. In the list on the right, click **IA0001003**, or the lowest numbered Incident Alert that we created initially for the Exchange server outage.
4. Scroll down towards the bottom until you see Related Links above the Impacted CI's list. Click **Initiate Conference Call**.

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5. A dialog like the following will appear.




6. Notice that most of the users show up in **Red**. This means that these users do not have a valid phone number in their user record. Lucy Barnes shows up in **Black** meaning she has a valid phone number that we updated in an earlier exercise. Feel free to update another user with another phone number.

7. Notice the list of User Contacts from the Incident Alert that were either automatically added from contact definitions or those manually added automatically show up on the right Selected Side.

8. Notice on the Left is a list of recommended contacts. This is populated by the On-call members (1st, 2nd, and 3rd) of the Group Contacts from the Incident Alert. Recall the groups automatically added by contact definitions were the Service Desk and the Network team. If you want to include any of these members in the conference call, you can double-click them to move them to the Selected side.

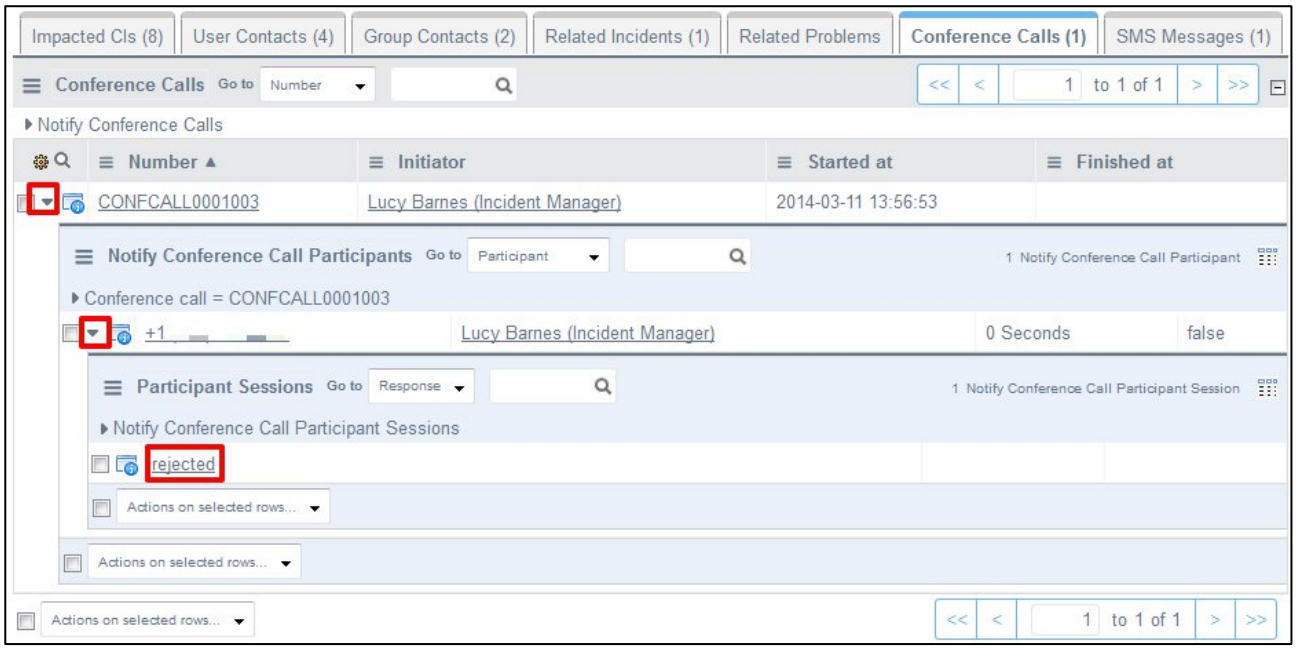
9. At the bottom, you also have the option to add other users or even specific phone numbers to the conference call.

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10. Since most of us only have one phone, let's proceed with the recommended contacts. Click **OK** at the bottom. At the top of the Incident Alert you will get several messages letting you know that some users do not have a "voice capable phone number configured". You can ignore these messages.

11. Momentarily you will receive a call to your mobile phone. Notice that Twilio has text to speech capabilities reading you some details about the Incident Alert. When prompted, click **2** to reject the call.

12. Scroll to the bottom of the Incident Alert form to the Conference Calls section (click **Conference Calls** tab). Notice a conference call record is created to reflect that a conference call was initiated from this Incident Alert. Expand the hierarchal list to see the details collected and show that you rejected the conference call.




## Lab Success Verification

1. A conference call was successfully initiated from an Incident Alert.

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# Lab Goal

Resolve an Incident Alert and capture **Post Incident Review** (PIR) details.

**Lab 8 Resolve Incident Alert**

## Resolve an Incident Alert

1. In the Filter Text box, type **alert**.
2. Click **Open** under the Incident Alert Management application.
3. In the list on the right, click **IA0001003**, or the lowest numbered Incident Alert that we created initially for the Exchange server outage.
4. At the top, change the State to Resolved. Then **Click Additional actions and select save** so we can remain on this record.
5. Notice a new section called Post Incident Review (**Post Implementation Review** tab) appears. Scroll down to this section or click the Post Incident Review tab.
6. Notice details about the source incident appear on this tab. Here you are given an opportunity to enter details such as resolution notes, summary, and lessons learned.
7. Set the **Resolution Code** to Complete, if not set already by default.

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8. Enter the following information:

   Resolution notes: **Hardware team restarted the Exchange server and service was restored. Microsoft was engaged and suggested applying a patch.**

   Summary: **Exchange server blue screened.**

   Lessons learned: **Microsoft suggested we keep our servers up to date.**

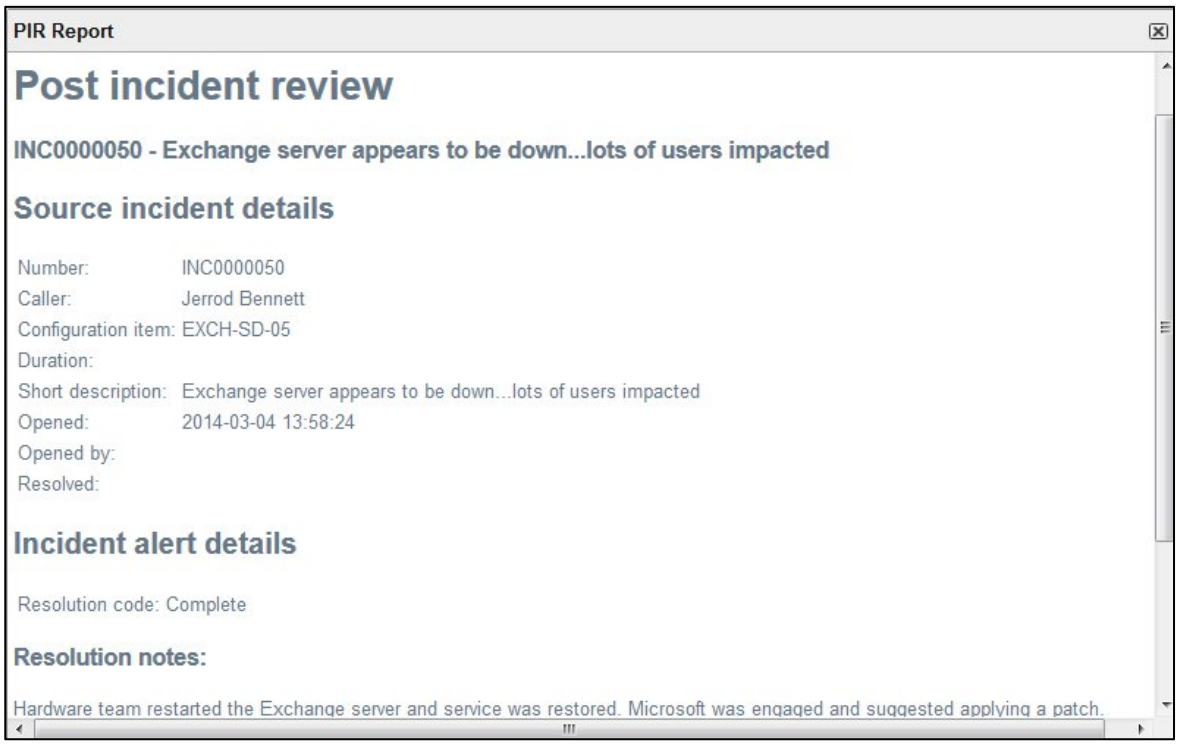
9. Click **Additional actions** and select **Save** so we can remain on this record.

10. Click **View PIR Report** under Related Links. This report can be printed to provide “gun-shot” report of what happened, what did we do, what do we do next. It is also useful information for a formal Problem or Root Cause Analysis record.

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## Lab Success Verification

1. The Incident Alert we opened previously is now resolved. We are able to view the Post incident review report.





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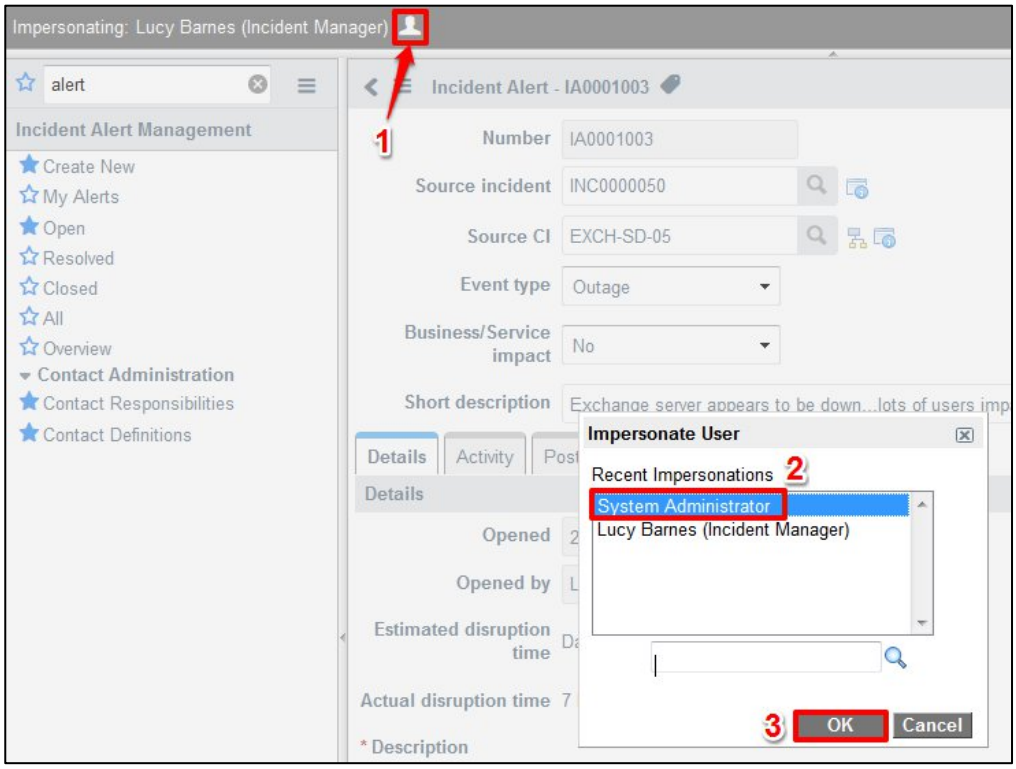
# Lab Goal

The Eureka release includes an updated On-Call Rotation (Rota) application. This has been integrated with Notify with bi-directional SMS capabilities. In this lab we will create a new Rota and trigger rule.

**Lab 9**
**Create On-Call Rota**

## Create new on-call Rota

1. Log on as System Administrator by clicking **Impersonate User**.




2. Once the Impersonate User dialog appears, select **System Administrator** in the Recent Impersonations list.

3. Click **OK**.

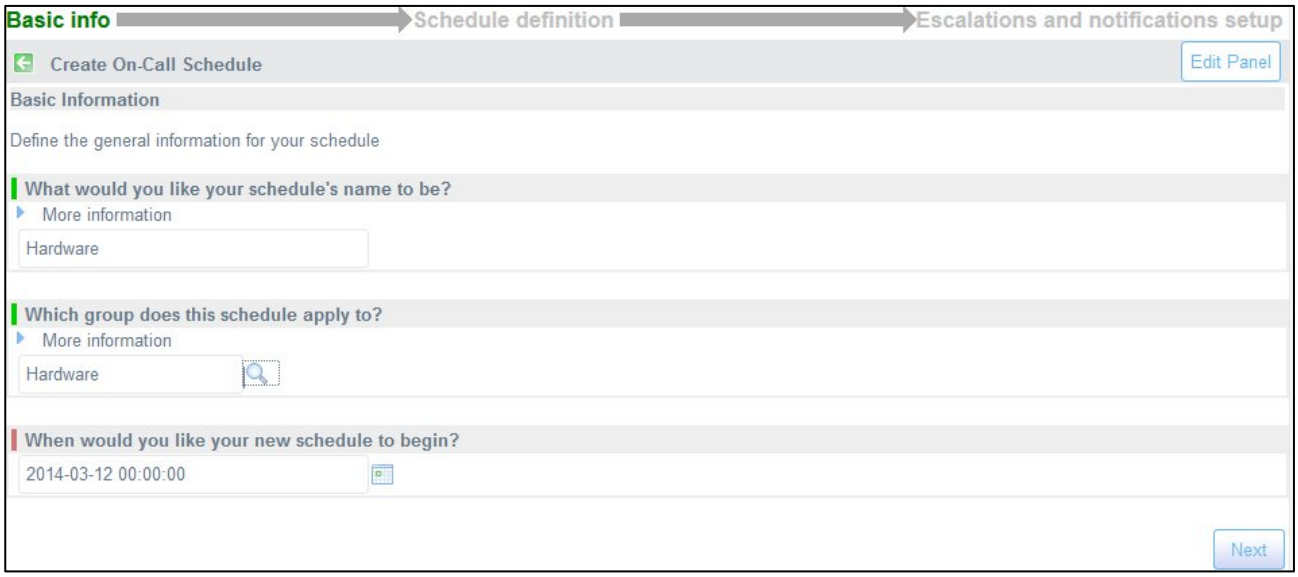
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4. In the Filter Text box, type **on-call**.

5. Click **Create New Schedule** under Administration.

6. Enter the following information:

   What would you like your schedule's name to be?: **Hardware**
   Which group does this schedule apply to?: **Hardware**



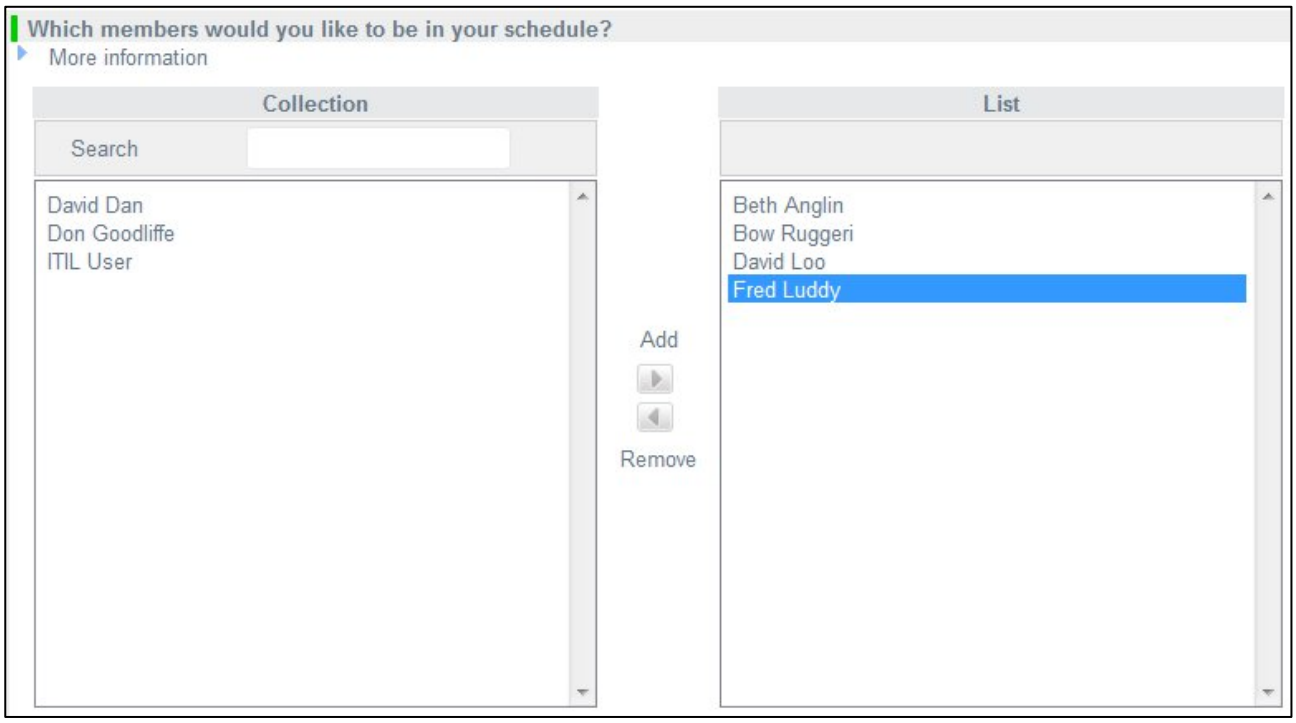

7. Click **Next**.

8. Choose Yes to use an existing schedule and choose **24 x 7** for the schedule, if not set by default. Then click **Next**.

9. Choose **1** for the first question on the number of duty rotations.

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10. Notice you are able to choose which members of the Hardware team are part of the on-call rotation, versus the entire group. Select the following members for the schedule: Beth Anglin, Bow Ruggeri, David Loo, and Fred Luddy. You can double-click on each member to move them from the left Collection side to the right List side.




**Note**: Please make sure Beth Anglin is the first person in the list.

11. Choose **1** for the number of reminders.

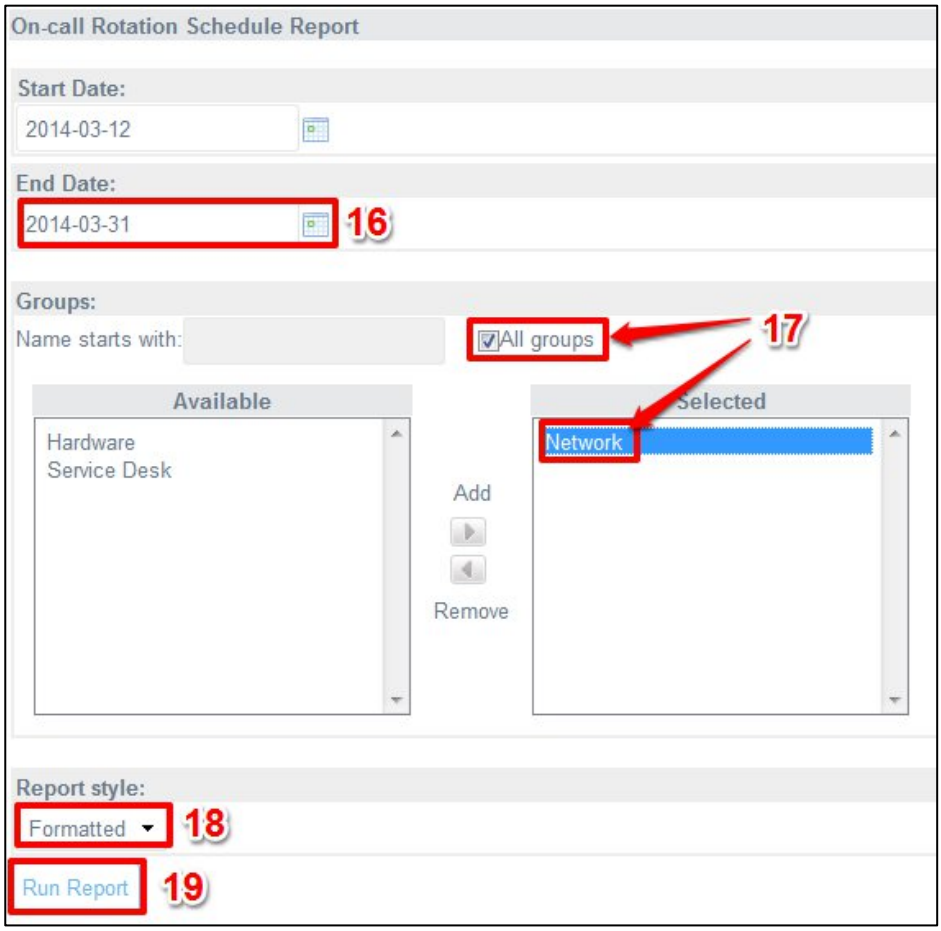
12. Choose **15** minutes for the wait until sending the next reminder.

13. Click **Next**.

14. You should now be taken to a calendar view of the Rota. Notice that Beth is on-call starting today for the next week and then Bow Ruggeri is on call after that.

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15. There is also another view of the schedule included in Eureka. In the On-Call scheduling application, click **Schedule Report**.




16. Leave the Start Date the default of **today's Date**, but change the End Date to the **end of the month.**

17. Click the **All groups** checkbox. Then double-click on **Network** to move it to the Selected side.

18. There are a few options for report style. Choose **Formatted**.

19. Then click **Run Report** at the bottom.

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20. Notice on the formatted report you are seeing multiple schedules for the Network: EMEA, Americas, and APAC. From this view you are able to view who is on-call and between what hours. Notice the Network (Americas) has a Primary and Secondary schedule. This view can also be printed.

21. Feel free to repeat Steps **15-20** to view the Table view of this report or look at another Rota.

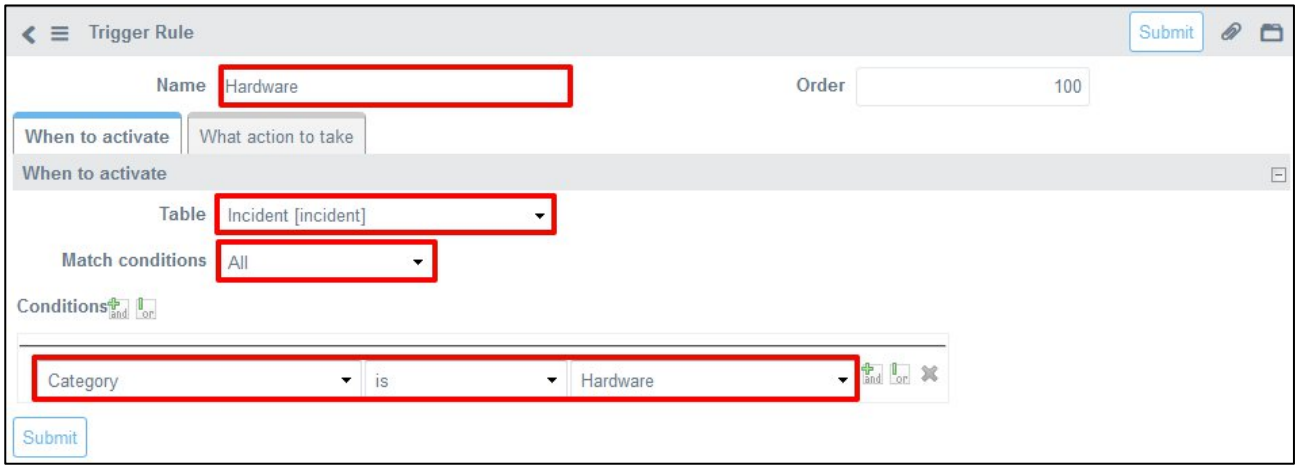
22. Now that we have the schedule defined, we need to create a trigger rule to assign the Hardware team to a task and start the On-Call workflow.

23. In the On-Call scheduling application, click **Trigger Rules**.

24. Click the **New** button at the top of the list to create a new rule.

25. Enter the following information:

    Name: **Hardware**
    Table: **Incident**
    Match conditions: **All**
    Conditions: **Category is Hardware**

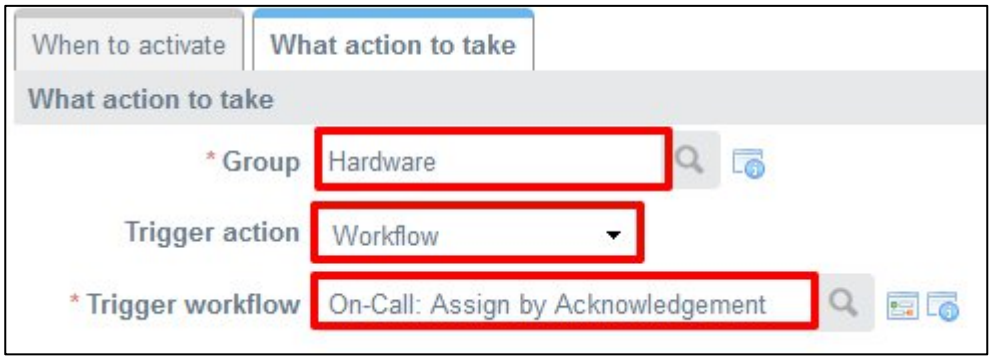



26. Go to the What action to take section. Click the **What action to take** tab.

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27. Enter the following information:

    Group: **Hardware**
    Trigger action: **Workflow**
    Trigger workflow: **On-Call: Assign by Acknowledgement**




28. Click **Submit**.

## Lab Success Verification

1. A new Rota and Trigger Rule for the Hardware Team has been created.

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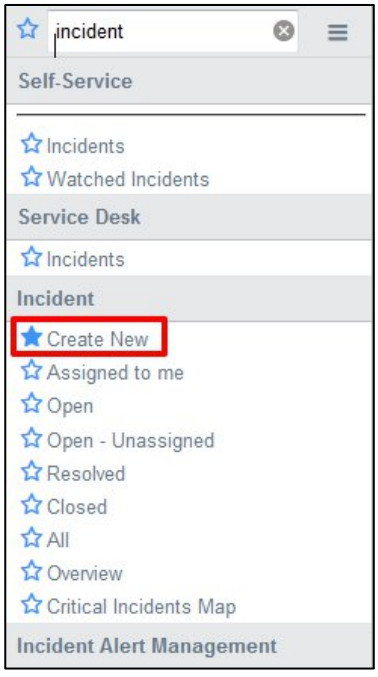
# Lab Goal

Now that we have created a Hardware Rota and Trigger Rule, any new incident where the category is Hardware will automatically be assigned to the Hardware team and a workflow will start to assign to the On-Call person through a verification process.

**Lab 10**
**Test Hardware Rota**

## Create Incident to Test Hardware Rota

1. In the Filter Text box, type **incident**.
2. Click **Create New** under the Incident application.



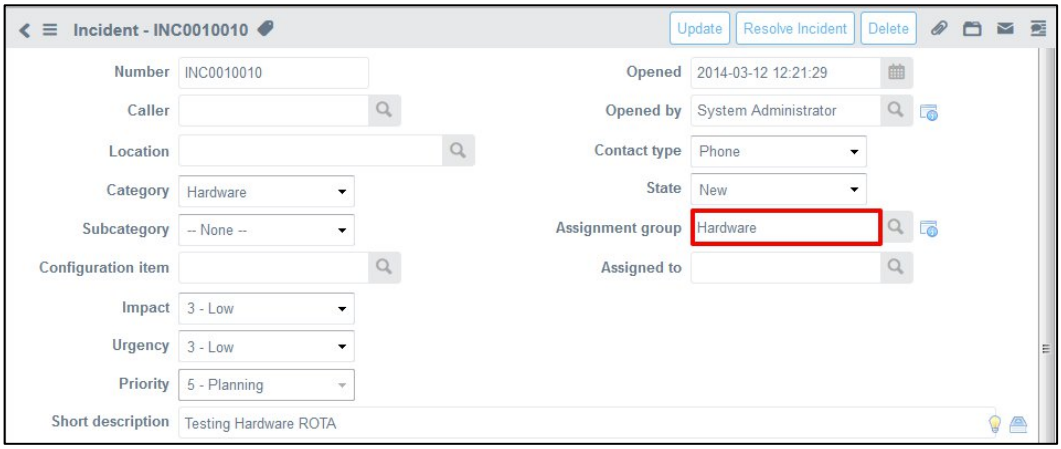

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3. Change the **Category** to Hardware and enter **Testing Hardware Rota** in the **Short Description** field. Take note that the Assignment group is currently empty as well as the Assigned to person.

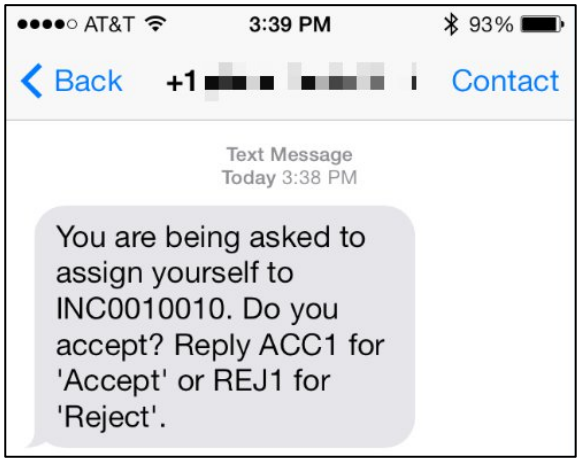
4. Click **Additional actions** and select **Save** so we can remain on this record.

5. Take note of the Incident number as will need this in a few steps.

6. Once the record has been saved, the Assignment group should automatically be populated with Hardware. This is because of the trigger rule we created.




7. Shortly you should receive a Text on your Mobile Phone asking you to accept or reject the assignment of this new incident.




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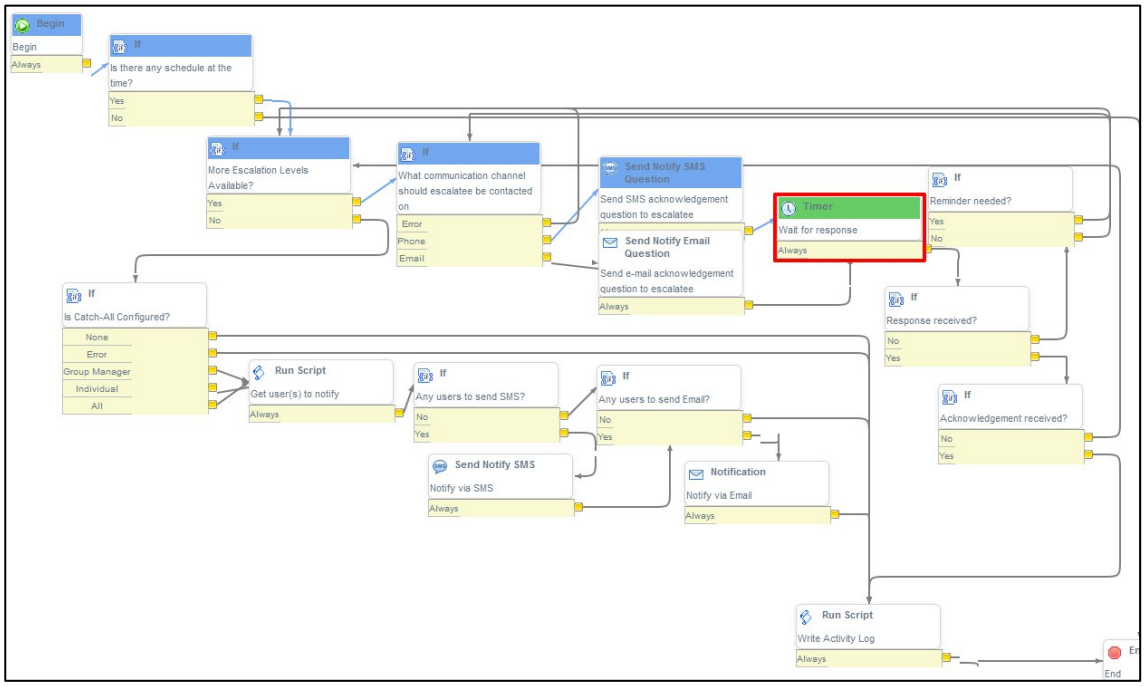
8. Before you respond to this text, let's view the workflow. Unfortunately out of the box a "Show Workflow" UI action doesn't exist on Incident, but this is something that can easily be copied from Change or Request. In the Filter Text box, type **workflow**.

9. In the Workflow Application, click **Active Contexts**.

10. In the List, you should see one for the incident you just created above for the "On-Call: Assign by Acknowledgement" workflow. Click the **Blue**  icon on the left side of this row.

11. Scroll down until you see Related Links. Click **Show Workflow**.

12. This is an out of the box workflow that comes with the new version of On-Call Rotation. Notice right now the workflow is waiting on a response from the SMS that was generated.

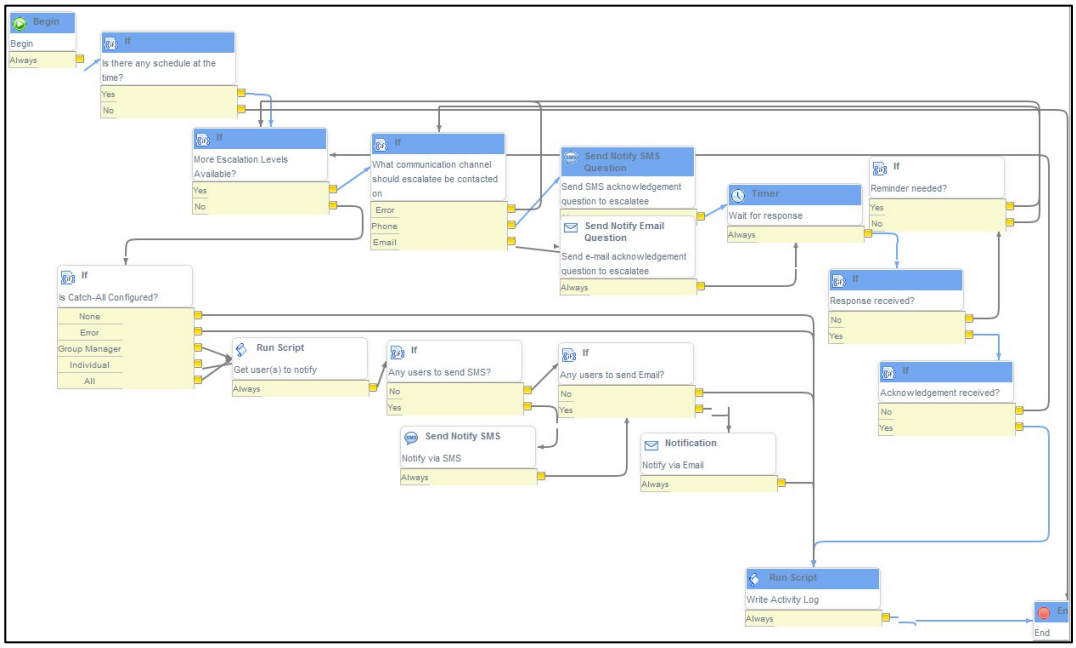



13. Now respond back to the SMS that you received earlier. Reply back with **ACC1** to accept the assignment.

14. Now go back to ServiceNow and click the **Refresh** button in the upper-right corner - 

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15. Notice now that you have accepted the assignment of the Incident, the workflow has completed.




16. Let's go back to the Incident, in the Filter Text box, type **incident**.

17. Click **Open** under the Incident application. In the list to the right, open the incident you previously created. The number will be in the SMS you received.

18. Notice that Beth Anglin is now assigned to the incident. If you recall you had added your phone number to her user record earlier.

## Lab Success Verification

1. Incidents of category Hardware are automatically assigned to the Hardware Group.
2. The On-Call person will receive a SMS to accept or reject the assignment.
3. Replying to the SMS will update the Incident.

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