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Incident 201
Proactive Major Incident Management with Notify

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Agenda

Lab Instance Setup – Labs 2-4

Introduction to Notify and Incident Alert

Lab Exercises 5-8

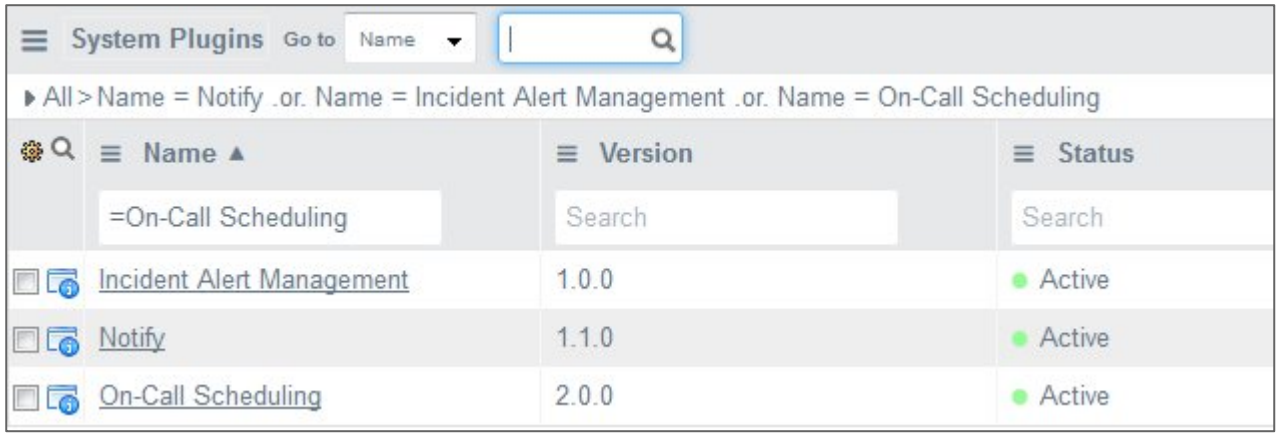
Introduction to Eureka On-Call Scheduling

Lab Exercises 9-10

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Lab 1 – Enable Plugins

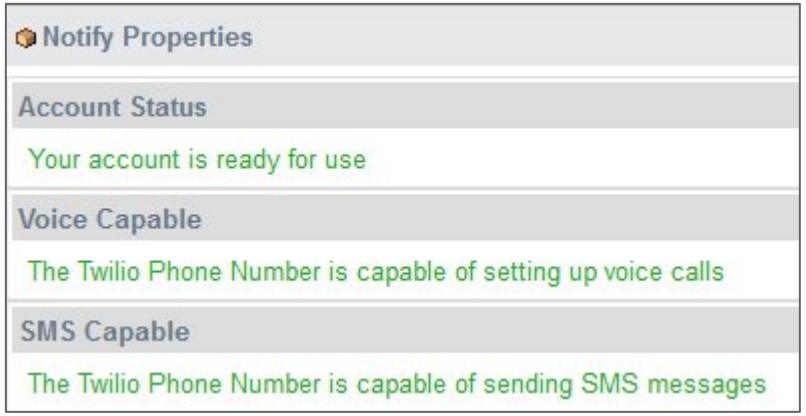
- Goal
  - Enable Plugins needed for this lab
- Steps
  - Listed in Lab 1



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Lab 2 – Setup Notify

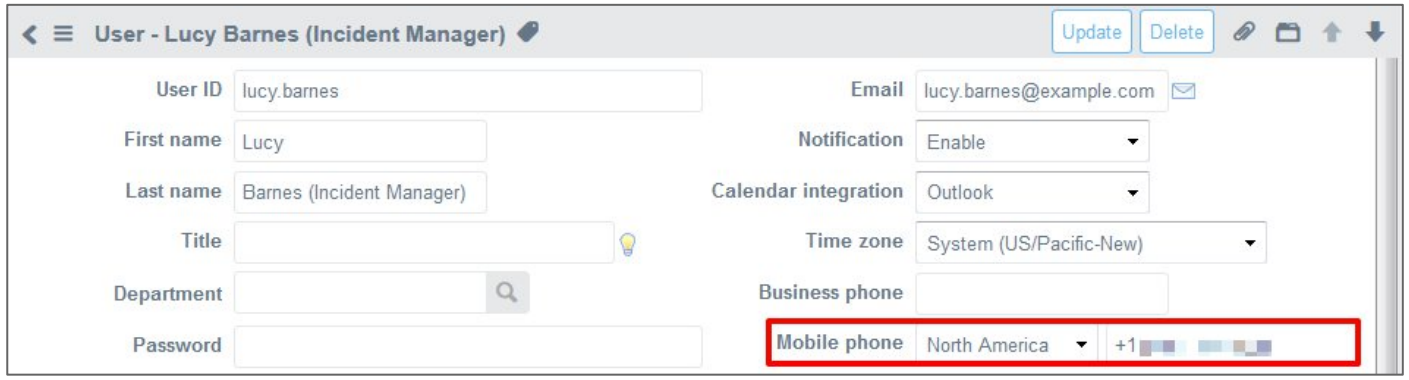
- Goal
  - Setup Notify with Twilio Account
- Steps
  - Listed in Lab 2

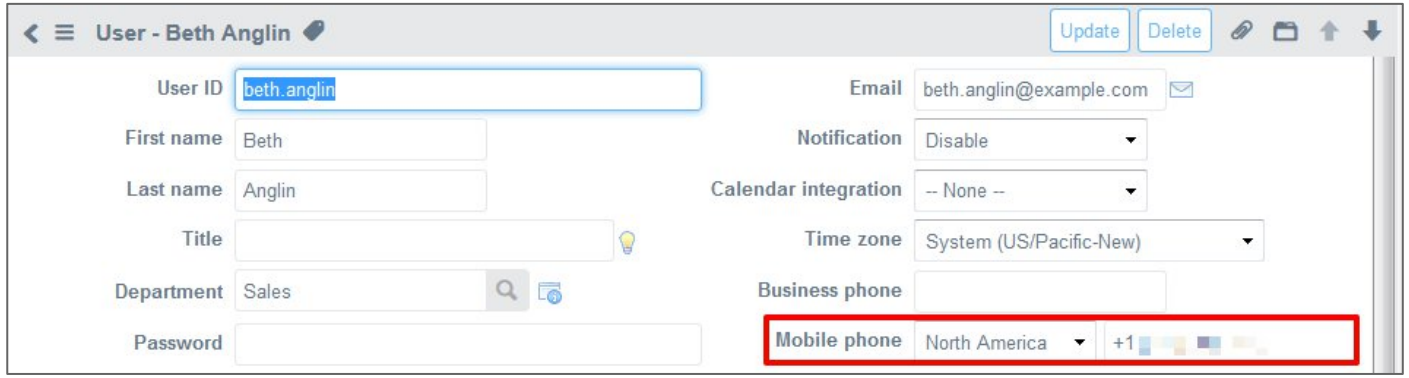


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Lab 3 – Update users

- Goal
  - Update OOB Users with your Mobile Phone
- Steps
  - Listed in Lab 3





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Lab 4 – Modify Incident Alert Form

- Goal
  - Add 2 related lists to the Incident Alert Form
- Steps
  - Listed in Lab 4



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Notify

A brief overview

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Product Overview

Notify	
Purpose	A single platform feature that provides workflow driven notifications over SMS, Voice and Conference Calls
Description	Powered by Twilio, the application provides new platform features to deliver bi-directional notifications over SMS, Voice and Conference Bridges. Tightly integrated with the workflow engine and business rules, it delivers a highly configurable and trusted way to deliver messages across a range of channels. With the additional ability to control acknowledge/ rejection and message delivery, the power of the platform is fully utilized.
Additional Opportunities	Call Center IVR and ACD functionality, ITSCM and BCP Call Tree scenarios for major events/ crisis situations.

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Notify

Key Benefits	Key Features
• A single system tied to workflow for distribution of SMS, Voice • Initiate conference calls/bridges from within an Incident • Bi-directional support for recording actions/ responses to messages delivered • Worldwide support and delivery, resources can be anywhere on any communication device	• Tightly integrated with workflow and ITSM applications • One stop shop for managing communications • Socially enabled and integrated to Live Feed and Chat

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Users, SMS and Voice

- Driven by device info registered as part of a users profile
  - Phone #'s have to be E.164 compliant
- Workflow triggers notification
  - Send SMS to mobile devices
  - Calls Phone # of user when adding to a conference call
- Bi-Directional Workflow
  - Provides options for 'Press 1' or 'Press 2' to drive an capture response as part of workflow
  - Responses are recorded and can trigger other actions/activities
- Usage is tracked in the instance
  - # of conference bridges, time spent (mins), participants etc.
  - SMS Messages sent

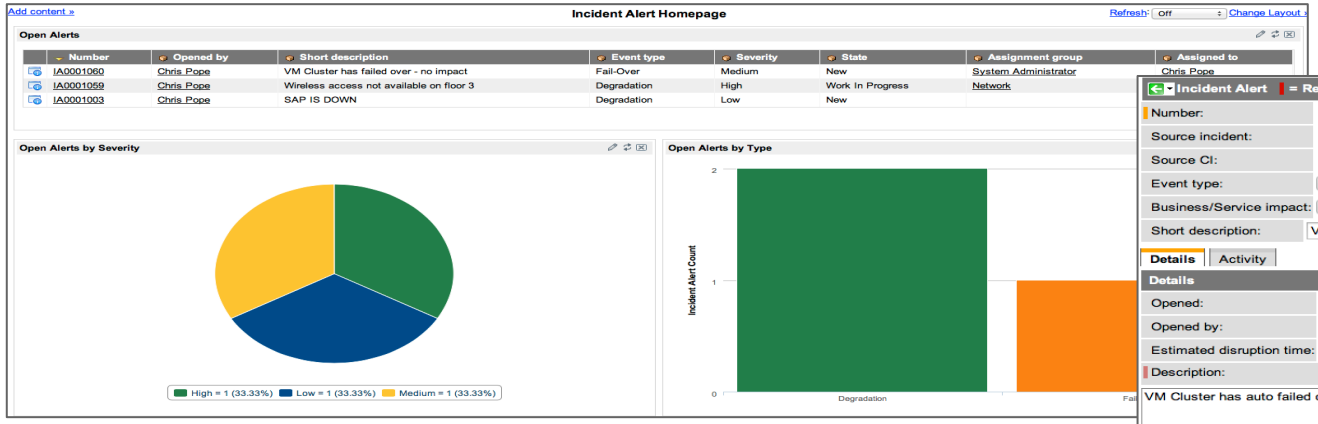
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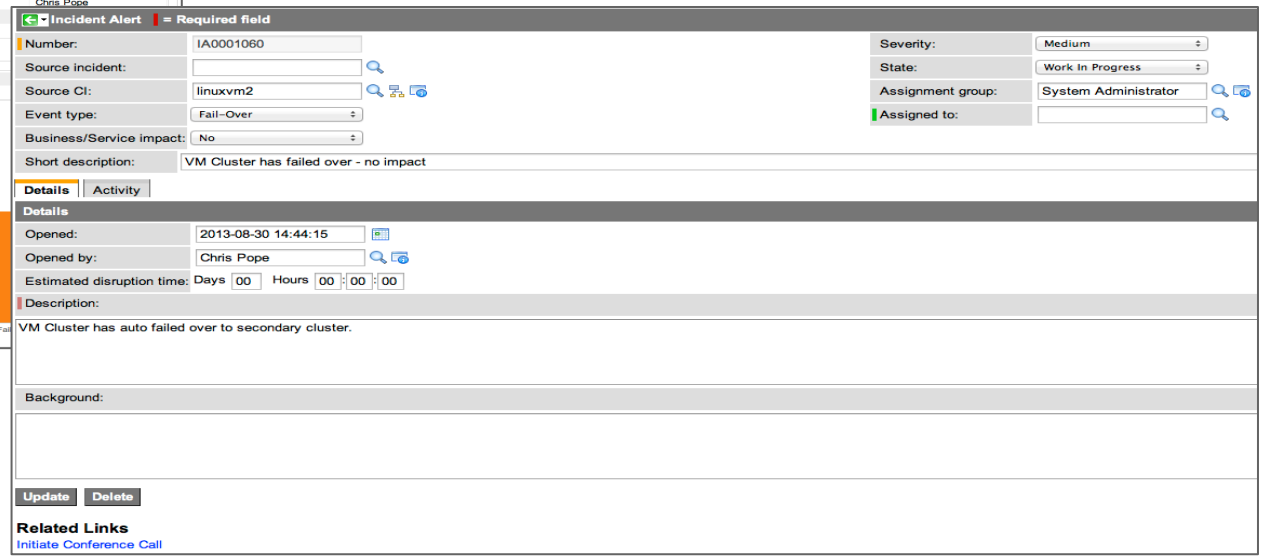
Incident Alert

A brief overview

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Incident Alert





Problem	Solution
IT struggles to manage service restoration activities and communicating effectively with impacted/interested parties	A single solution to manage outbound communication of impacted services, restoration activities, and post-incident follow up tasks.

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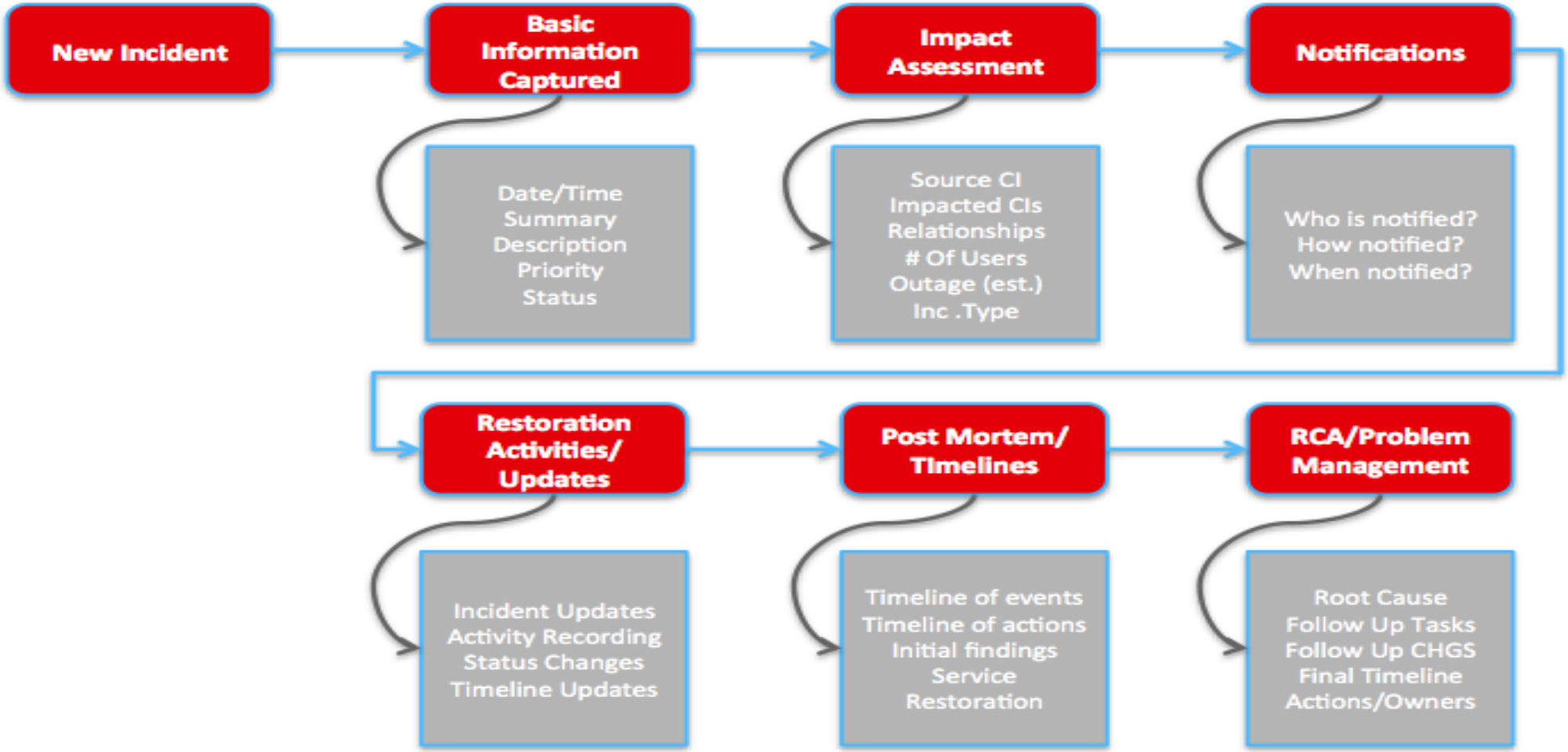
Incident Alert Management (IAM)

Definition.

- Major IT Incident – ITIL definition (SO)
  - The highest category of impact for an incident. A major incident results in significant disruption to the business
    - A virus outbreak
    - Email server failure
    - Critical business application failure
- Major Incident – Non IT
  - DR/BCP situations
  - People Displacement
  - Reputational impact
    - A large global company of 50 sites suffers fire damage in one location and employees are unable to reach the site

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High Level Flow



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Personas / Roles

- **Duty Director (DD)**
  - Escalation point for all critical service affecting issues.
  - Works in partnership with the Business to approve recovery plans developed by the Duty Incident Manager (DIM) and to manage the senior level communications for the IT aspects of a serious incident.
- **Duty Manager/Operations Manager**
  - Assumed by the senior point of presence in the Level 1 production monitoring environment at the time that an incident occurs.
  - Assess the incident against standard operating procedures, and if in any doubt as to the urgency and/or impact of an incident he/she will immediately contact the Duty Incident Manager (DIM).
- **Duty Incident Manager (DIM)**
  - Role is taken by a senior technician and he/she is accountable for the co-ordination and management of all technical resources required to achieve incident resolution.
  - Convenes a post-incident review and produces initial post-mortem
- **Interested party**
  - Typically an impacted user, a service owner either directly impacted or potentially impacted by the incident, or a person in the business who is interested in certain IT services and availability. They have no active or participative role in incident resolution or recovery.

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RACI – IAM

	R	A	C	I
Duty Director			√	
Duty Manager/Operations Manager	√			
Duty Incident Manager (DIM)		√		
Interested party				√

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Persona Functionality

- **Incident Manager (IM)**
  - Joining conference bridges
  - Managing multiple Incident Alert's
  - Trigger notification events
  - On-call Rotas / escalation (E)
  - Post mortem / Post Incident Review

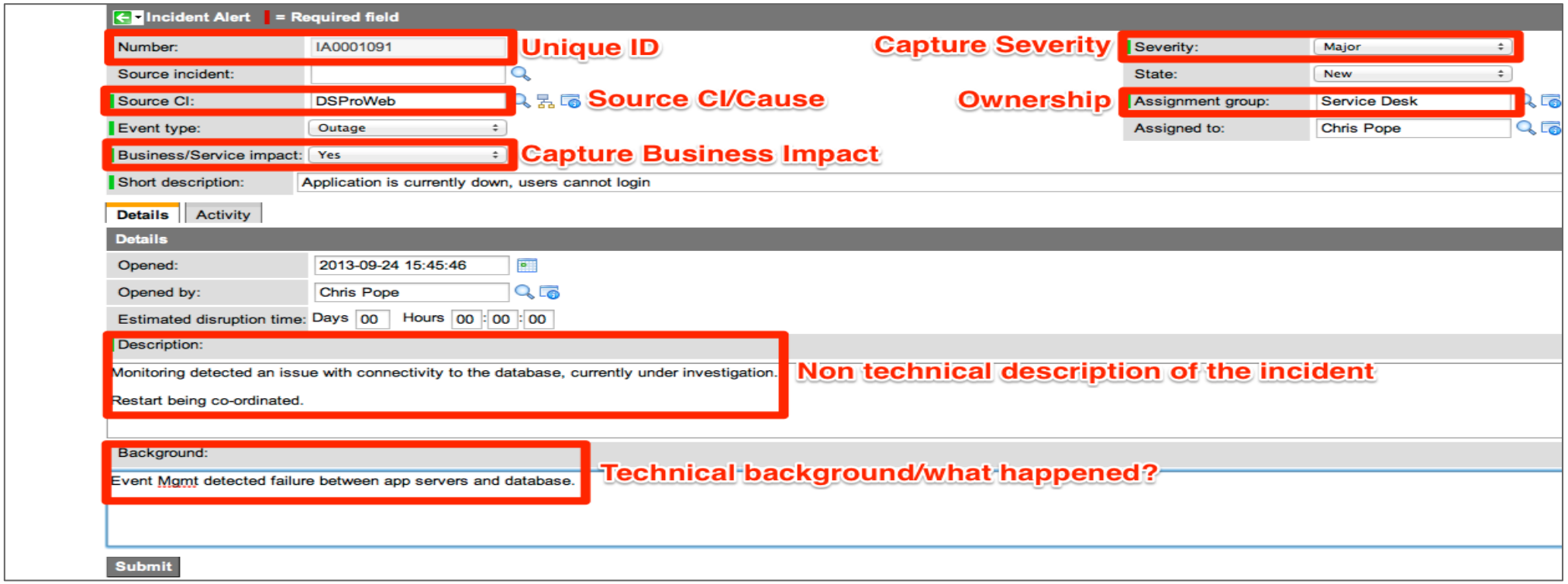
- **End user / Subscriber**
  Subscription Engine
  - Ability to subscribe based on attributes of the "notification event" raised
  - Ability to subscribe to notification events of their choosing
  - Ability to define delivery method
  - Ability to receive reports

- **Duty Director**
  - Ability to subscribe based on attributes of the "notification event" raised
  - Ability to subscribe to notification events of their choosing
  - Ability to define delivery method
  - Ability to receive reports

- **Duty Manager / Operations Manager**
  - Ability to create a new "notification event" (set up bridge)
  - Monitoring and tracking of IA's
  - Record and maintain chronology of events
  - Source System Impacted
  - Affected System(s) Impacted

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Create New IA

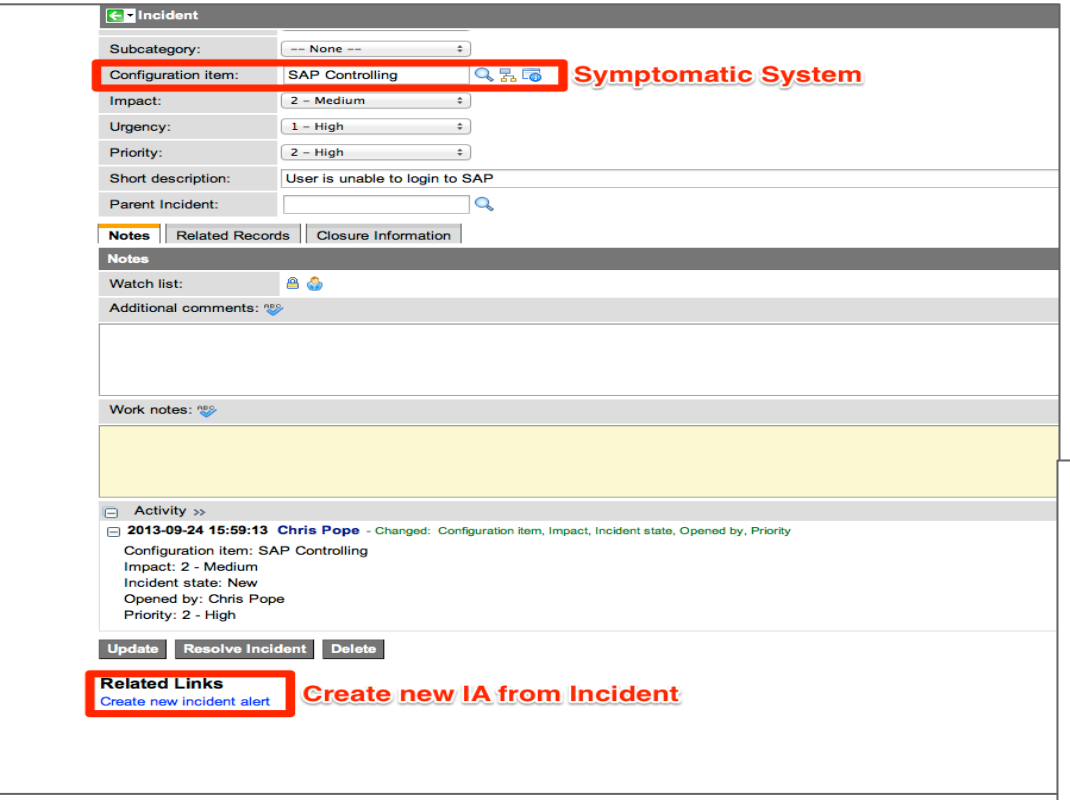


Create New

Capture important and relevant information about impact, ownership, severity, type of event and source system/impacted systems using CI records.
Incident Alert records non technical information that is customer/end user facing, not meant for technical resolution activities or log information etc.

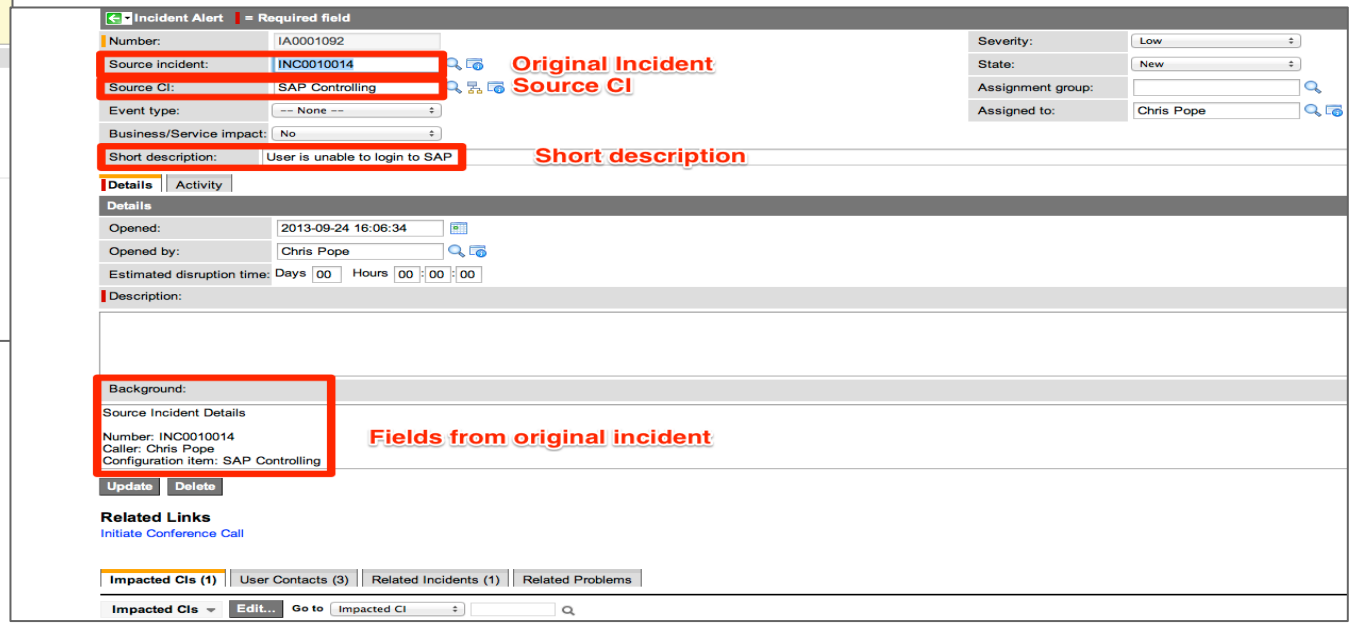
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Create New IA from existing Incident



Create New

Existing incident record captures basic information about the issue, symptomatic system the user is experiencing the issue with
Regular fields captured such as Impact, Priority, Assignment, State
New link on Incident under Related Links for “Create new incident alert”
Opens a new IA and transfers over fields from the original incident

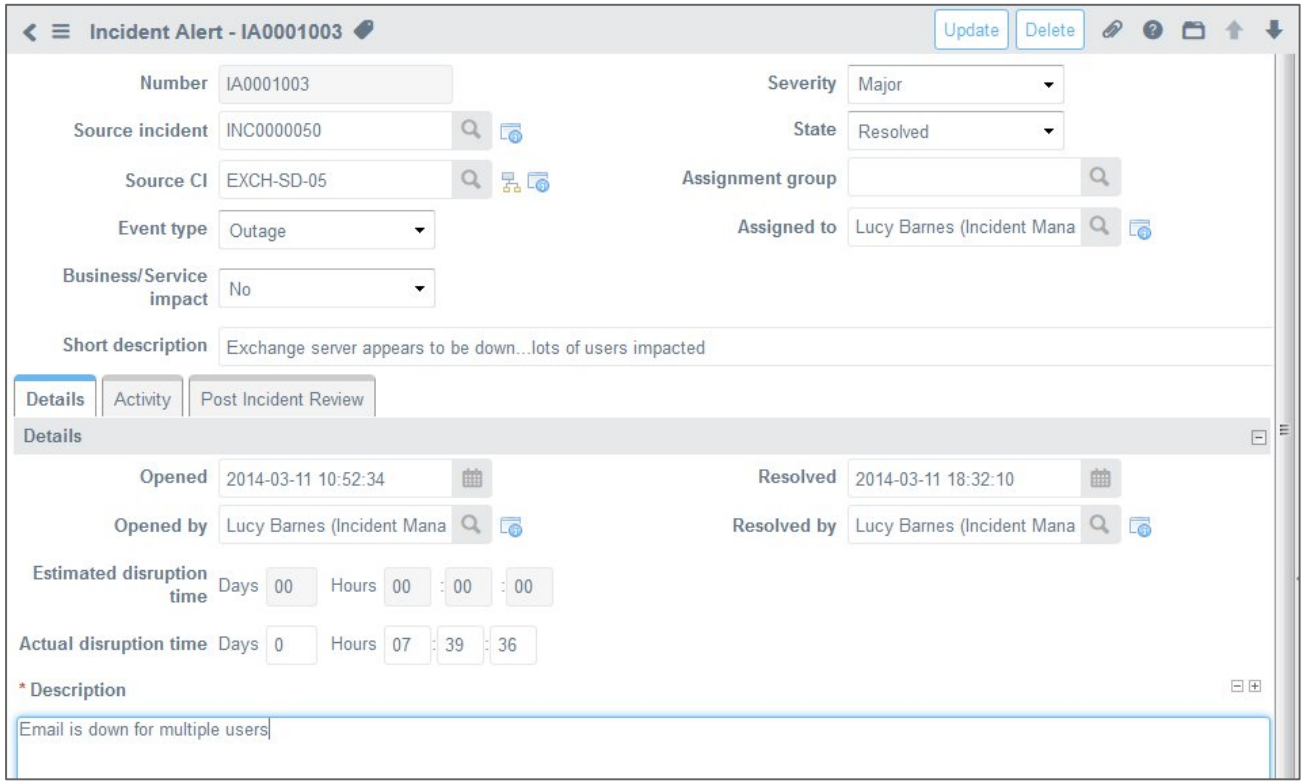


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Lab 5 – Create Incident Alert

- Goal
  - Create an Incident Alert from an existing Incident
  - Receive SMS Communication from ServiceNow
- Steps
  - Listed in Lab 5





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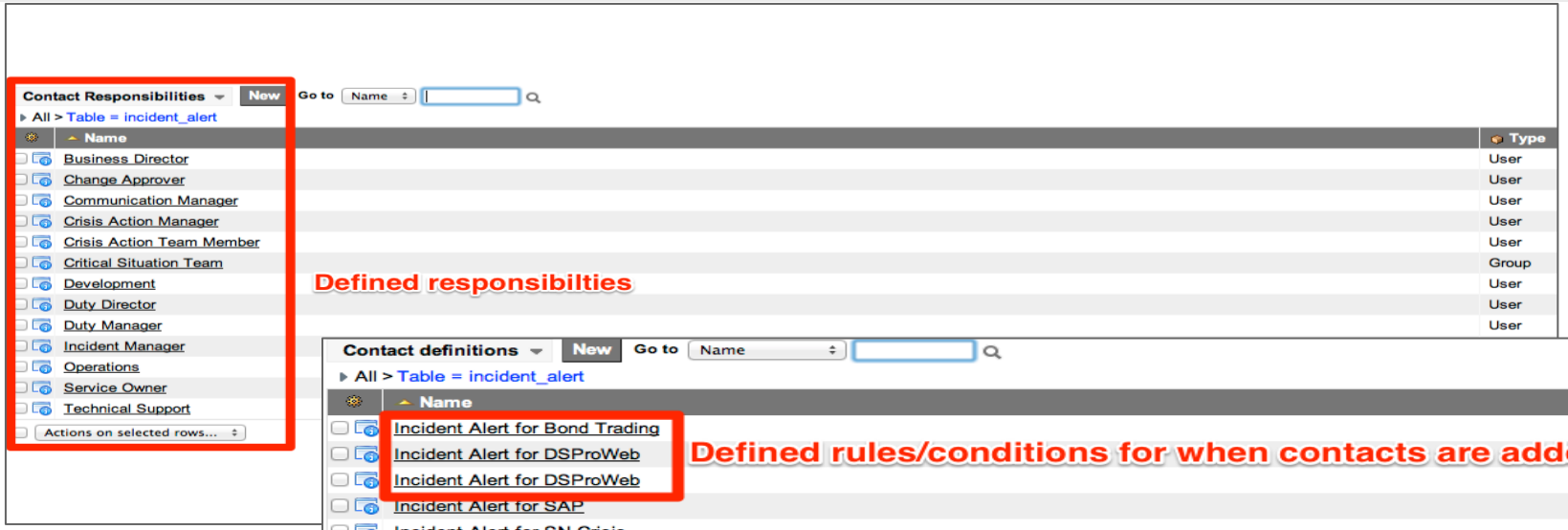
Contacts

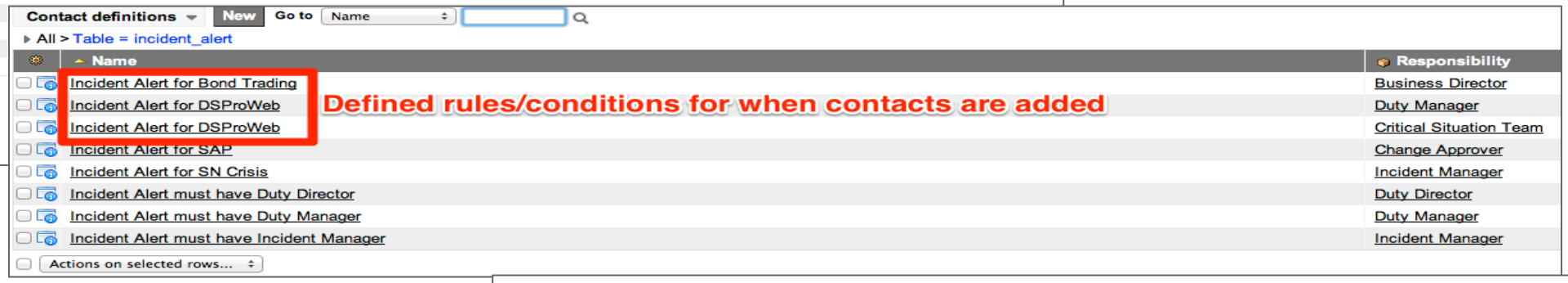
Responsibilities and Definitions enable rules-based contacts to be added

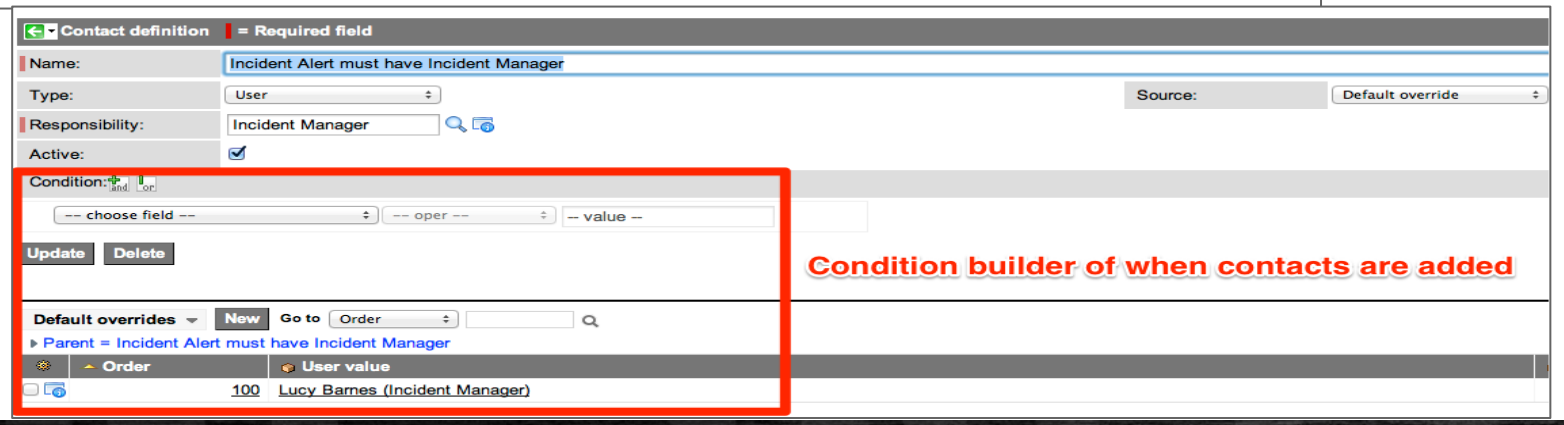
- Responsibilities
  - A attribute of a user or group that describes their responsibility in terms of the incident alert
    - Incident Manager, Duty Manager, Crisis Manager, Business Director, etc.
- Definitions
  - A condition built that when met adds the appropriate users or group to an alert with the assigned responsibility
- Example
  - All Incident Alerts Must Have An Incident Manager
    - When an Incident Alert is created, a user with the responsibility of Incident Management is automatically added

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Contacts, Responsibilities, Definitions



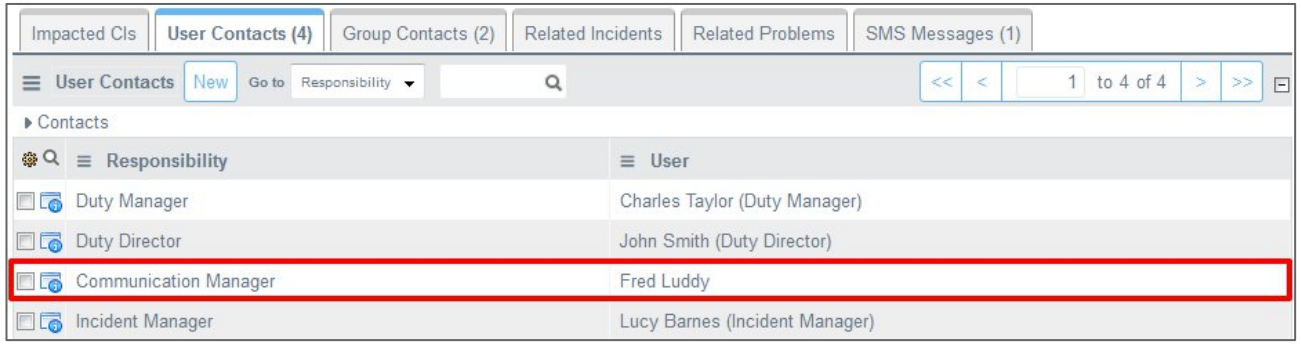




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Lab 6 – Modify Contact Definitions

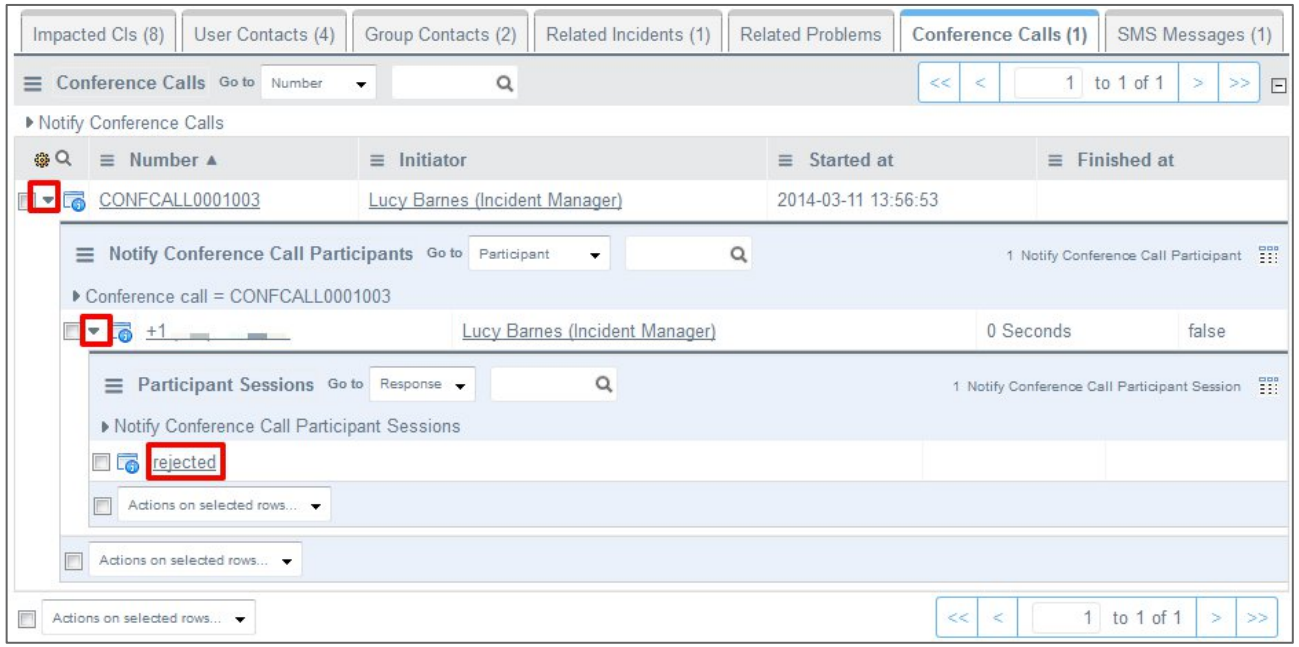
- Goal
  - Create a new contact definition to add a Communications Manager to IA's
- Steps
  - Listed in Lab 6



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Lab 7 – Initiate Conference Call

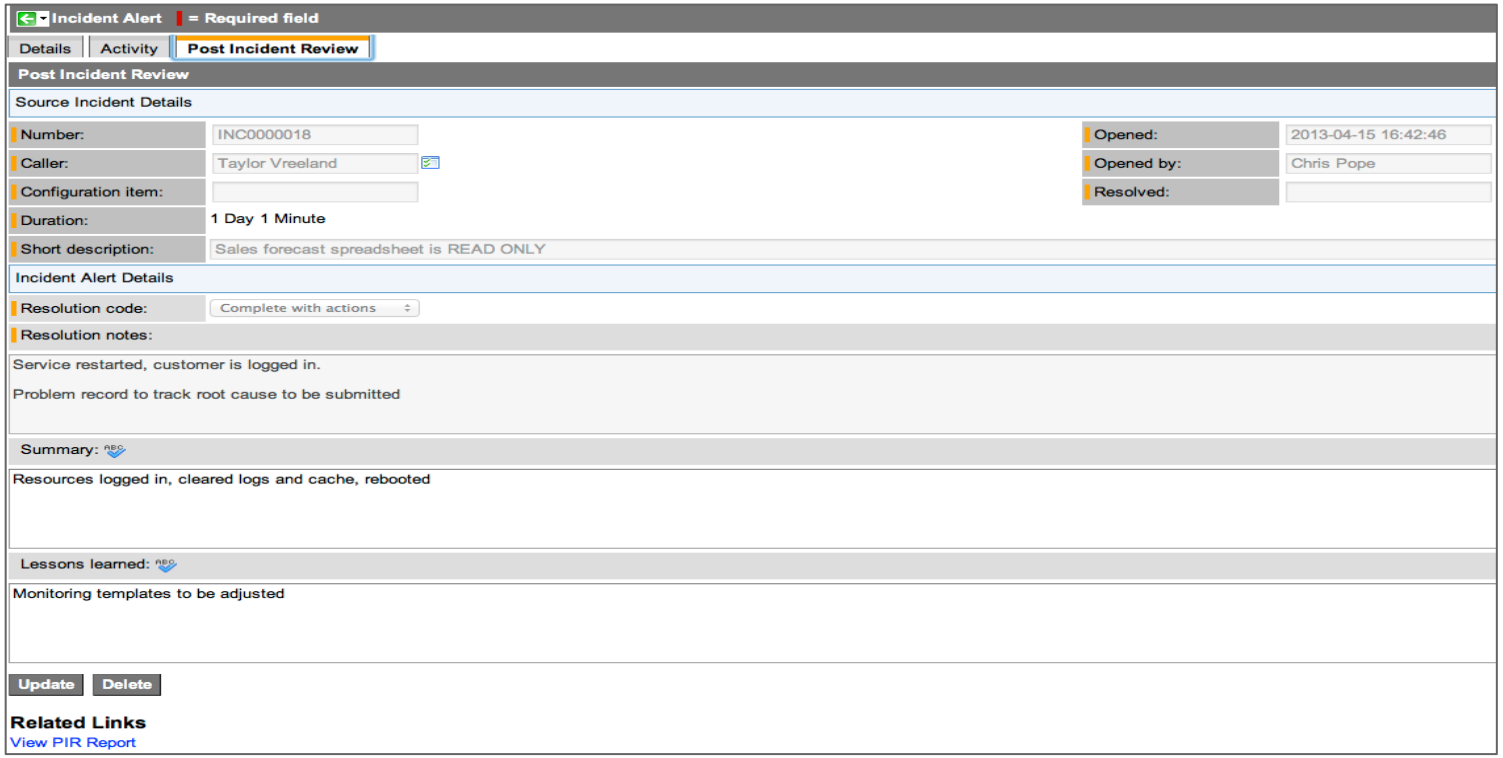
- Goal
  - Initiate a conference call from an Incident Alert
- Steps
  - Listed in Lab 7



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Post Incident Review (PIR)

An activity completed post incident resolution but prior to RCA



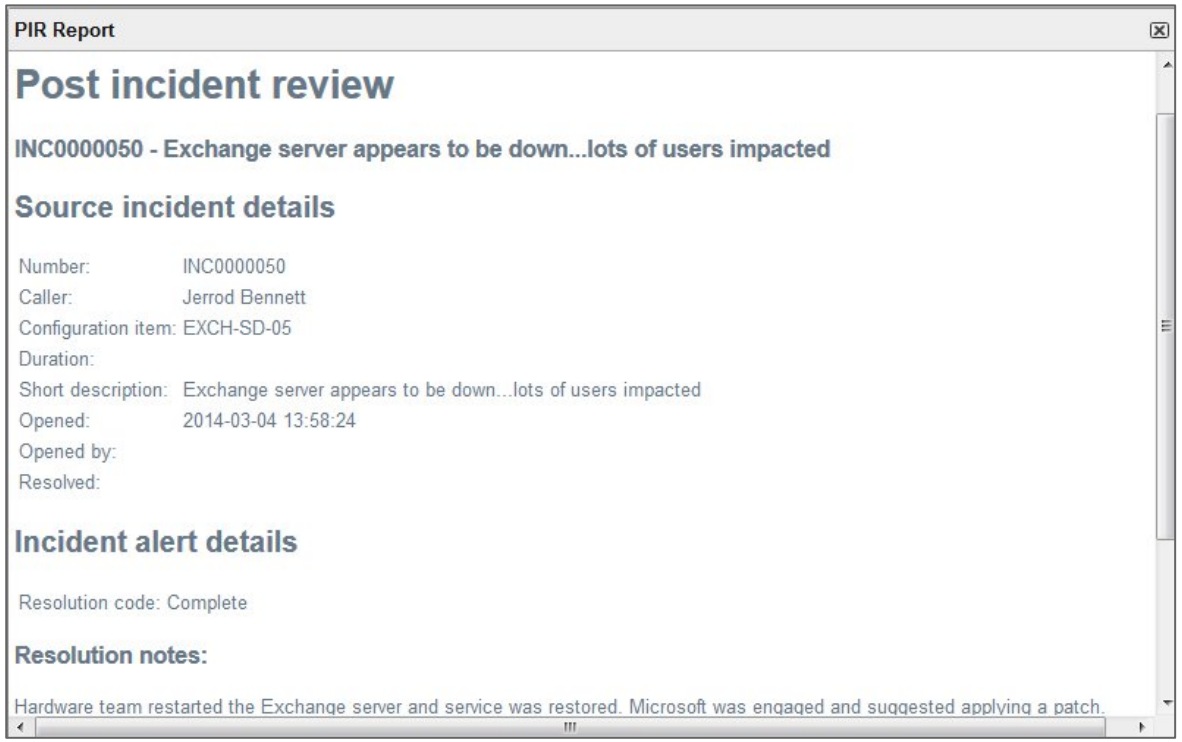
PIR

- Simple way to capture activities, comments and resolution notes post service restoration
- Can be printed to provide 'gun-shot' report of what happened, what did we do, what do we do next
- Serves as a pre-cursor to a more formal Problem record or Root Cause Analysis (RCA)

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Lab 8 – Resolve Incident Alert

- Goal
  - Resolve an Incident Alert and capture PIR details.
- Steps
  - Listed in Lab 8



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Eureka On-Call Scheduling

A brief overview

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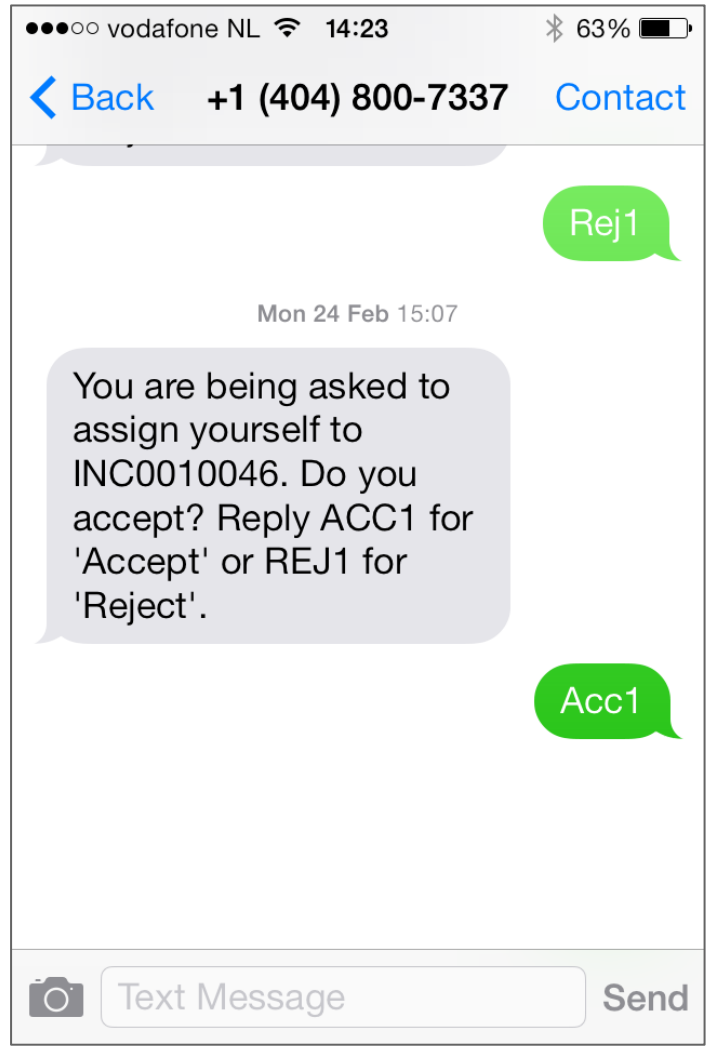
Eureka On-Call Scheduling Introduction

- Feature Objectives
  - Making On-Call Schedules more usable
    - Improved Schedule Creation Tools
    - Improved Reporting & Notifications
    - Better Support for Coverage/ Time-Off Requests
    - Replaced Business Rules with ServiceNow Workflows
  - Extending On-Call Functionality
    - Trigger Rules to allow on-call to be used with any task table
    - Allow Escalation Lineups and Catch-Alls
    - Cleaner and Published API
  - Integrations
    - With Notify to allow interactions via SMS
    - With IAM to allow on-call members to be available in Crisis situations

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Use Case for On-Call Scheduling

- 'SAP Financial Accounting' Business Service has an Outage
  - P1 Incident logged against the SAP's CI at 14:00
  - Incident's data will satisfy a 'trigger' which will do two things
    - Assign the incident to the group "SAP Services"
    - Start the workflow: Assignment by Acknowledgement
  - The workflow will retrieve the escalation plan right now E.g. 14:00 for SAP Services
    - David Loo (Primary)
    - Beth Anglin (Secondary)
  - Contact David straight away with a SMS - similar to the screenshot
    - If David Responds with ACC1 the incident is assigned to him
    - If David Rejects then Beth is contacted
  - If Beth rejects too
    - The Catch-All (Group Manager) is notified of the fact that no-one responded

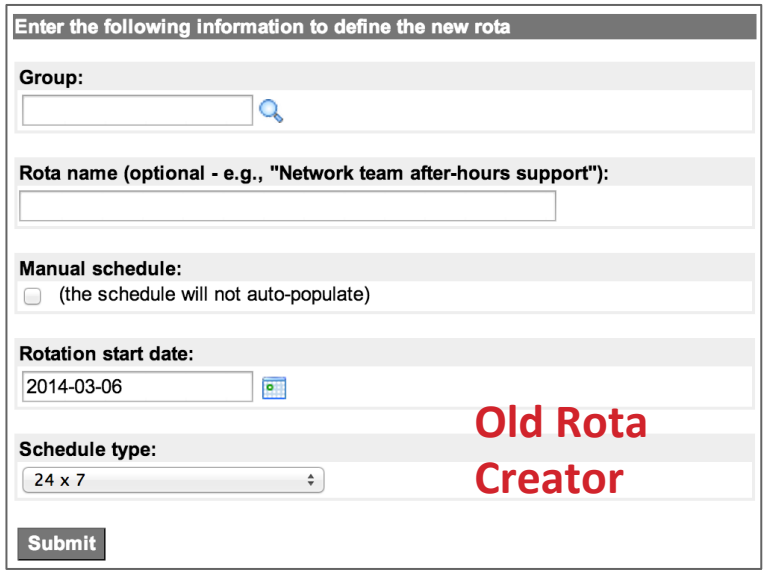


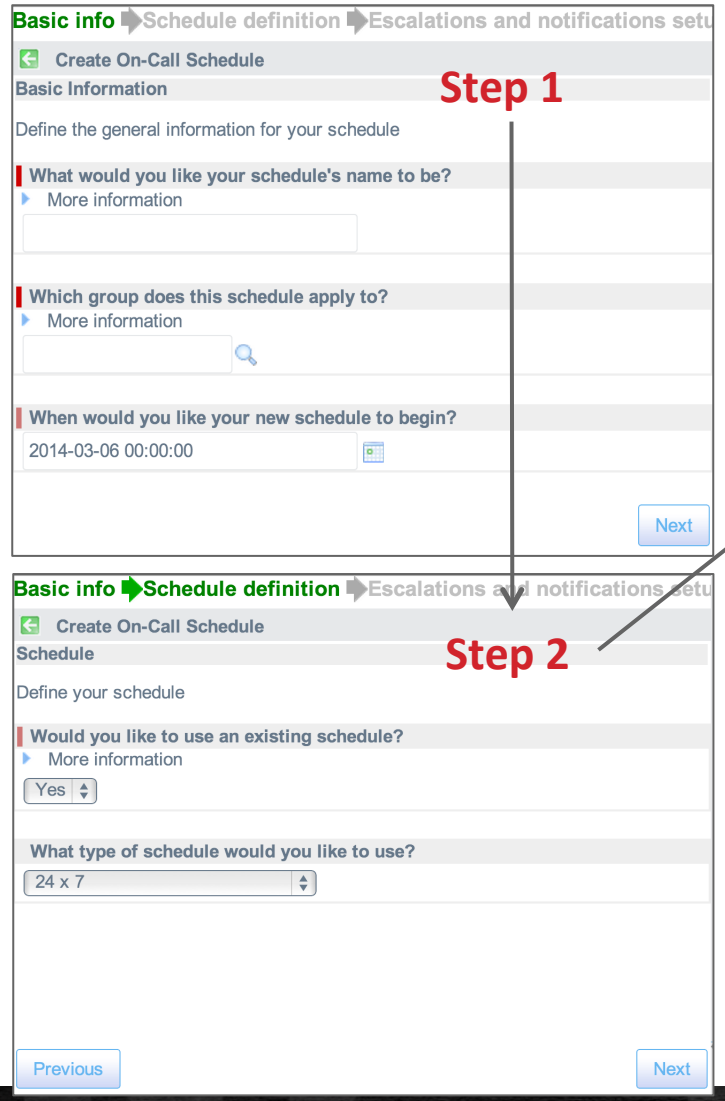
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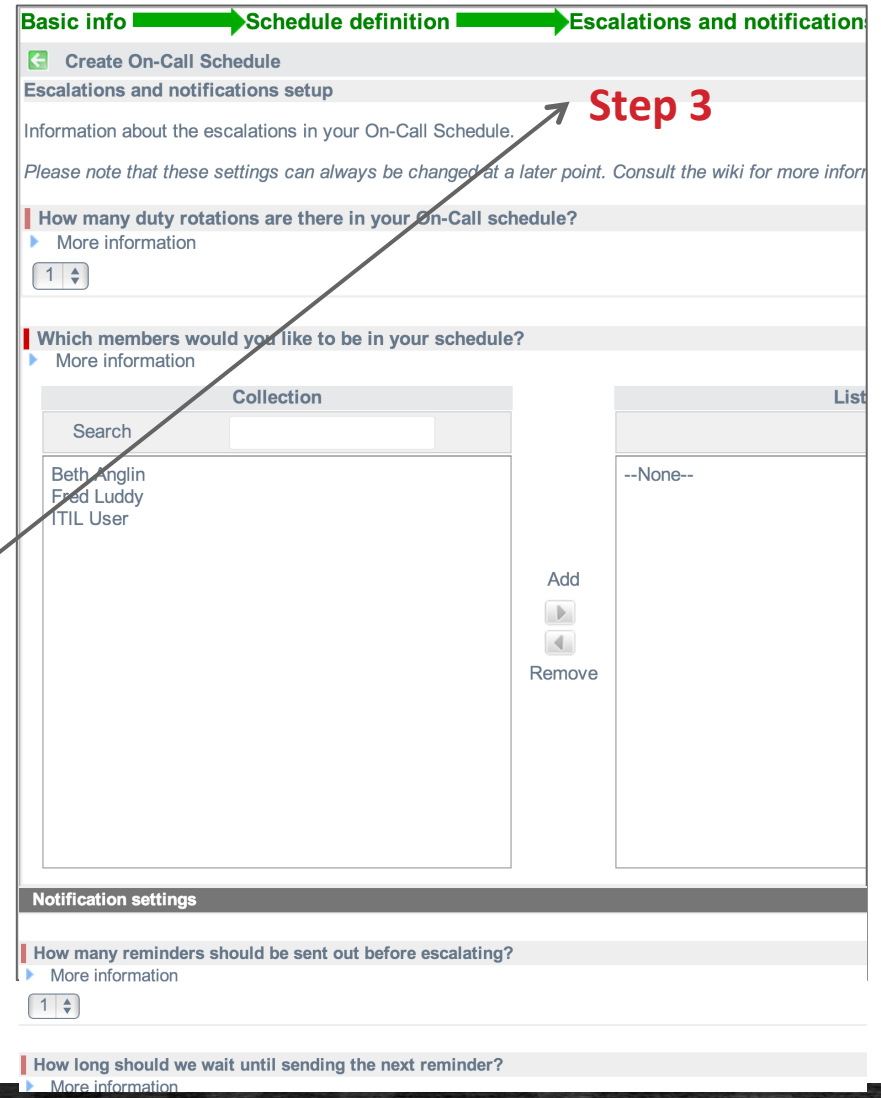
New Rotation Creation Wizard

Creation Wizard

- Create new Schedules
- Multiple rosters
- Select members

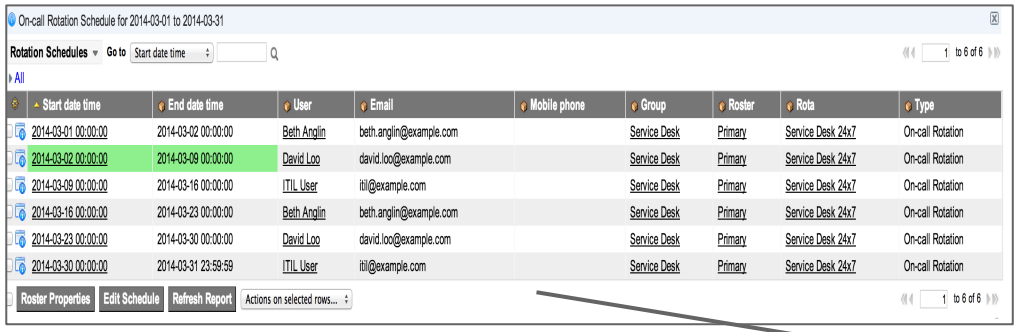






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Improved Reporting

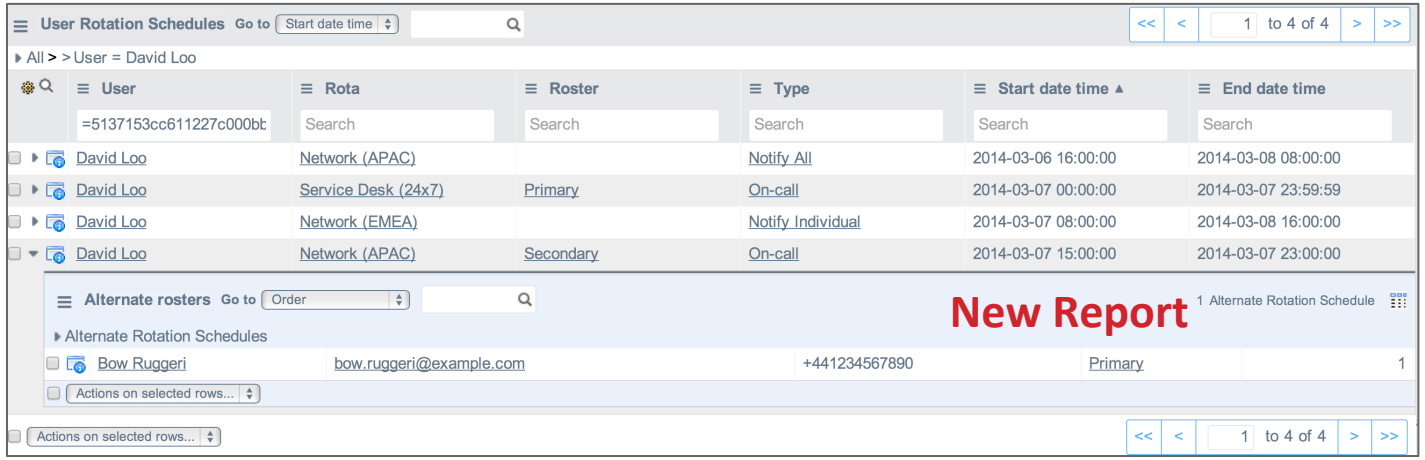


New Format

Network Schedule(s)	Roster	Shift	2014-03-03 Monday	2014-03-04 Tuesday	2014-03-05 Wednesday	2014-03-06 Thursday	2014-03-07 Friday
Network (EMEA)	Primary	08:00:00 - 16:00:00	David Dan	David Dan	David Dan	David Dan	David Dan
Network (Americas)	Primary	16:00:00 - 23:59:59	Fred Luddy	Fred Luddy	Fred Luddy	Fred Luddy	Fred Luddy
	Secondary	16:00:00 - 23:59:59	ITIL User	ITIL User	ITIL User	ITIL User	ITIL User
Network (APAC)	Primary	00:00:00 - 08:00:00	Bow Ruggeri	Bow Ruggeri	Bow Ruggeri	Bow Ruggeri	Bow Ruggeri
	Secondary	00:00:00 - 08:00:00	David Loo	David Loo	David Loo	David Loo	David Loo
Service Desk Schedule(s)	**Roster**	**Shift**	**2014-03-03 Monday**	**2014-03-04 Tuesday**	**2014-03-05 Wednesday**	**2014-03-06 Thursday**	**2014-03-07 Friday**
Service Desk (24x7)	Primary	00:00:00 - 23:59:59	David Loo	David Loo	David Loo	David Loo	David Loo
	Secondary	00:00:00 - 23:59:59	ITIL User	ITIL User	ITIL User	ITIL User	ITIL User
	Tertiary	00:00:00 - 23:59:59	Beth Anglin	Beth Anglin	Beth Anglin	Beth Anglin	Beth Anglin

Reporting

- Improved older reports
  - Format, Print, Export Reports
- Added new personalized report
  - Backups more prominent



New Report

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Improved Email Reminders

Email Notifications

- Improved Formatting
- Backups also more prominent

On-Call Reminder for Paul Palse

IT Service Desk
Sent: Saturday, 18 January 2014 15:00
To: Paul Palse

You are scheduled for on-call rotation for 'Paul Palse' at these upcoming times:

Development, Development (EU), Secondary
2014-01-20 08:00:00 À 2014-01-20 20:00:00
2014-01-21 08:00:00 À 2014-01-21 20:00:00
2014-01-22 08:00:00 À 2014-01-22 20:00:00
2014-01-23 08:00:00 À 2014-01-23 20:00:00
2014-01-24 08:00:00 À 2014-01-24 20:00:00
2014-01-25 08:00:00 À 2014-01-25 20:00:00
2014-01-26 08:00:00 À 2014-01-26 20:00:00

Old Email Reminders

Upcoming On-Call duties

Service Desk Notification
Sent: Saturday, 1 March 2014 15:00
To: Paul Palse

Group Rotation Schedule		Sunday 2 March	Monday 3 March	Tuesday 4 March	Wednesday 5 March	Thursday 6 March	Friday 7 March	Saturday 8 March
Development Development (EU)	15:00 to 03:00	Jeroen Wesbeek Primary +31644496979	Jeroen Wesbeek Primary +31644496979	Jeroen Wesbeek Primary +31644496979	Jeroen Wesbeek Primary +31644496979	Jeroen Wesbeek Primary +31644496979	Jeroen Wesbeek Primary +31644496979	Jeroen Wesbeek Primary +31644496979
	15:00 to 03:00	Paul Palse Secondary +31646403570	Paul Palse Secondary +31646403570	Paul Palse Secondary +31646403570	Paul Palse Secondary +31646403570	Paul Palse Secondary +31646403570	Paul Palse Secondary +31646403570	Paul Palse Secondary +31646403570

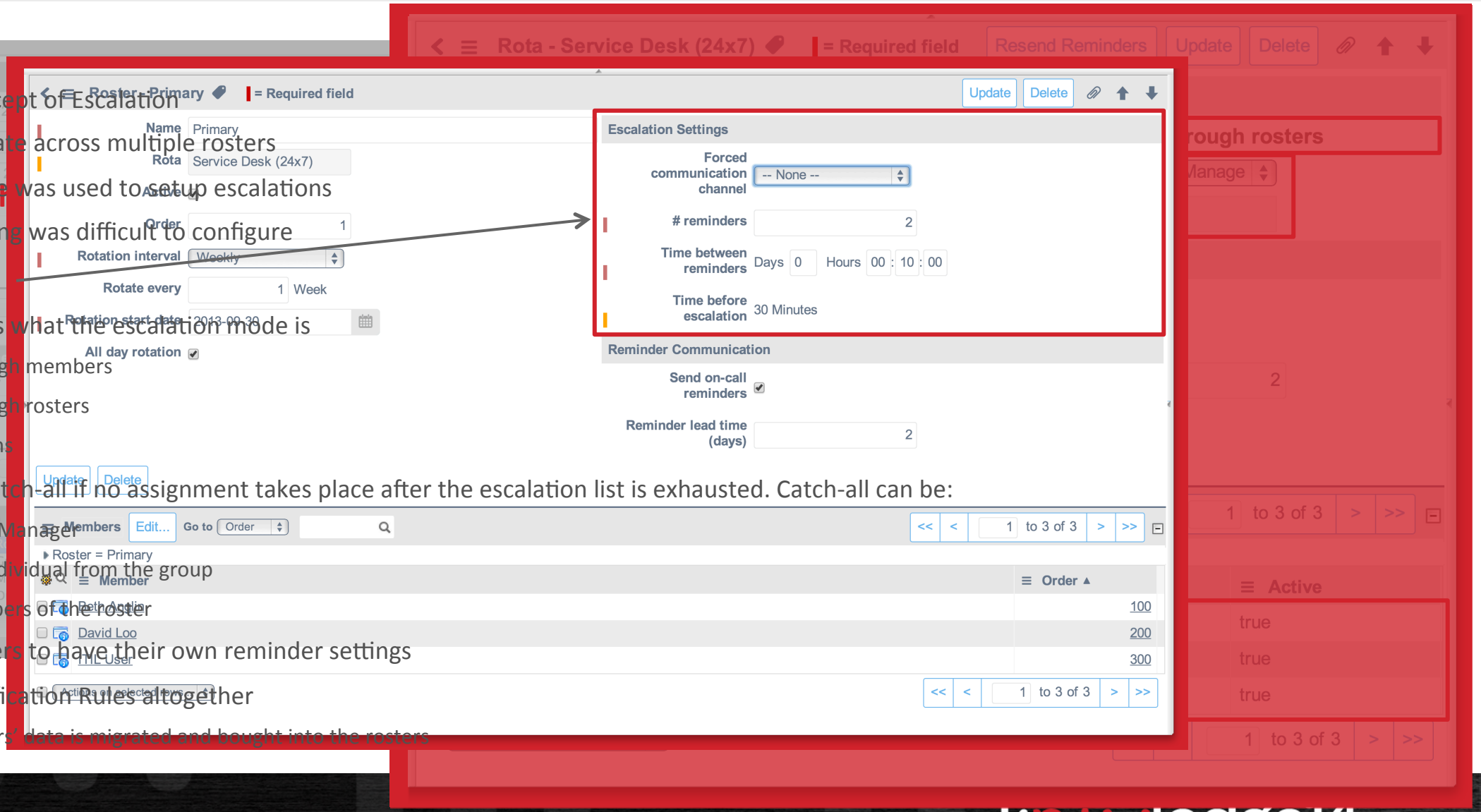
See your schedule

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Improved Escalation

- Pre-Eureka
  - Not a clear concept of Escalation
  - Could not escalate across multiple rosters
  - Notification Rule was used to setup escalations
  - Reminders setting was difficult to configure
- Eureka
  - Visually Obvious what the escalation mode is
    - Rotate through members
    - Rotate through rosters
    - No Escalations
  - Allows a final catch-all if no assignment takes place after the escalation list is exhausted. Catch-all can be:
    - The Group's Manager
    - Dedicated Individual from the group
    - All the members of the roster
  - Allows the rosters to have their own reminder settings
  - Deprecate Notification Rules altogether
    - Old customers' data is migrated and bought into the rosters

Escalation Settings per Roster

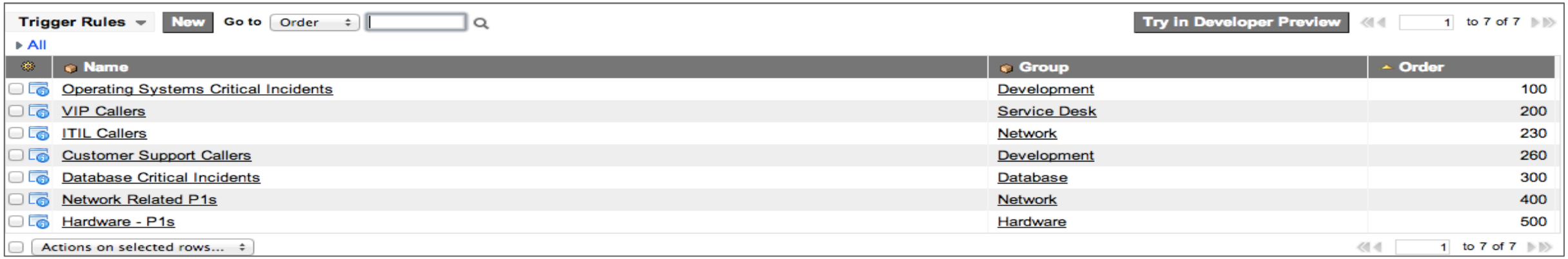


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Trigger Rules

"Trigger Rules": indicate what should happen when a task related record is created

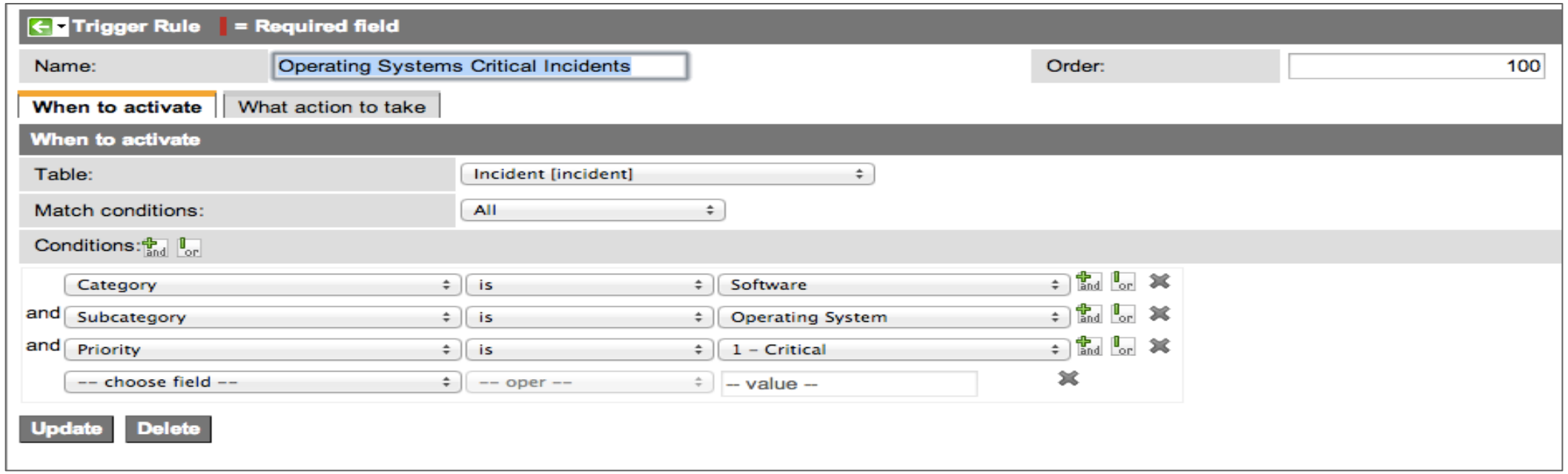
- Simple UI to generate rules that drive workflow around escalation
- Can be defined on a per group basis
- Rules can be set to be followed in a specific order
  - Example: Decreasing granularity or specificity to ensure that there is always a default to escalate to in the event on no response



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Granular Conditions for when to escalate

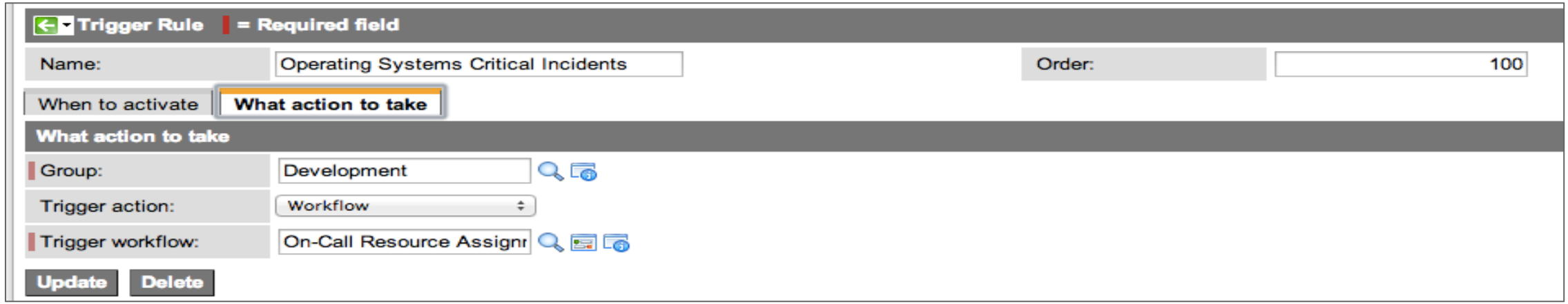
- No scripting needed
- Driven by fields on any Task based table
- Sets conditions to match against
  - ALL
  - ANY



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What actions to take

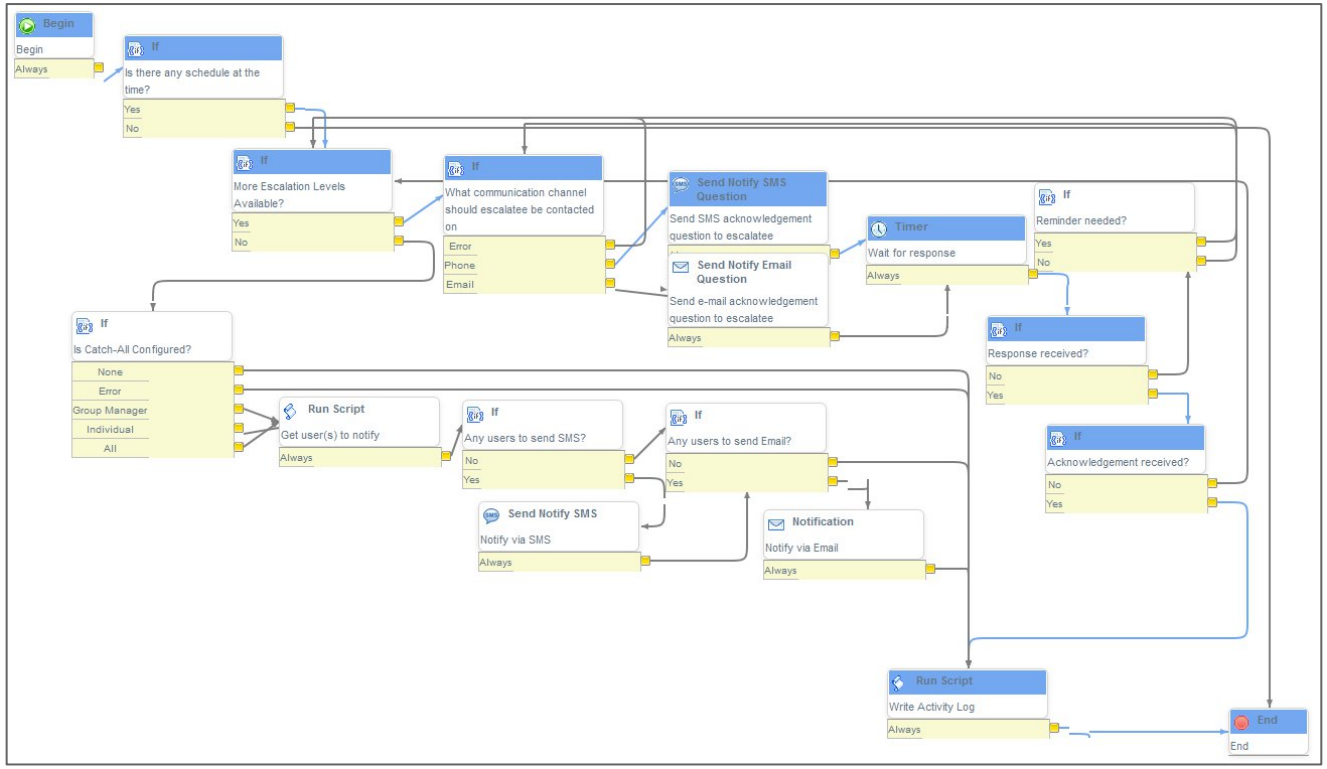
- When the rule is triggered what should the system do
- Assign ticket to specific assignment group
- Trigger Workflow to follow more granular routing or steps
  - Assign
  - Assign and Notify *
  - Assign by Acknowledgment *
  - Escalations by Email
- Can also trigger a script to drive more complex routing or logic conditions
  - Example – If trigger is during a planned change or maintenance window, then do not escalate, suppress.



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Workflow

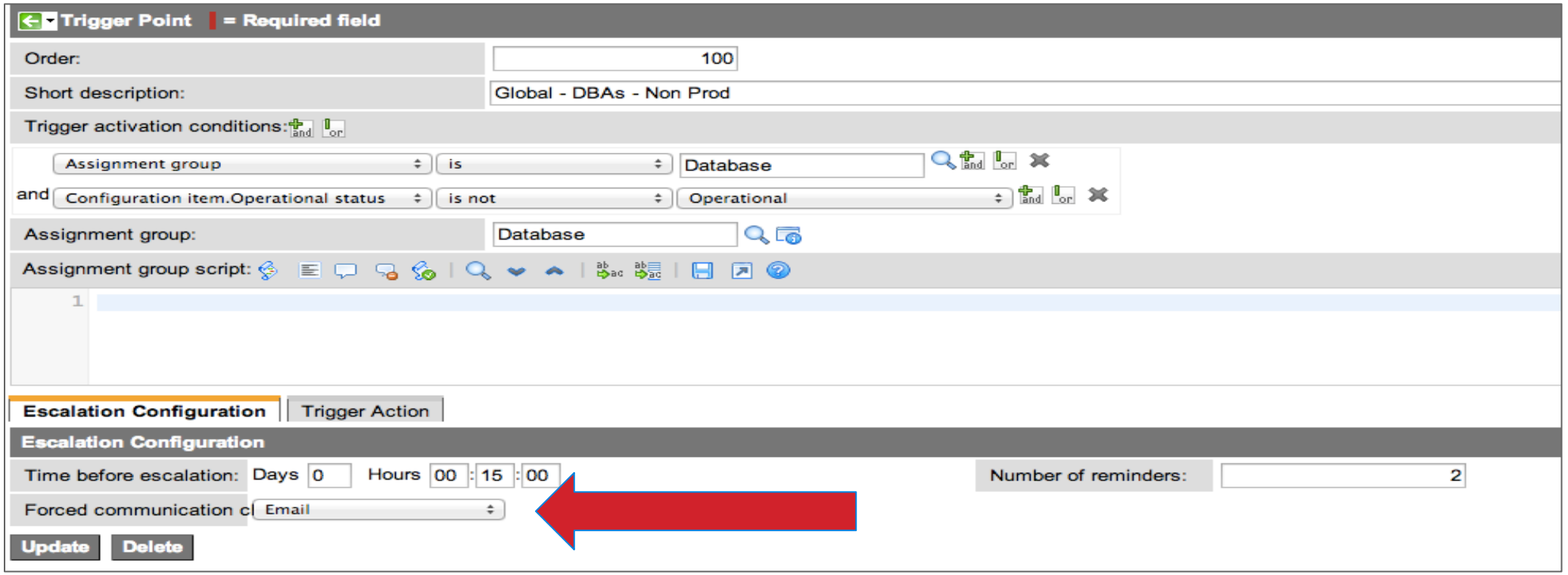
- Use workflow to build and define process for managing escalation and assignments
- Include notification and escalation triggers
- Provides the ability to include email and SMS options into the workflow for notification
- Logic to drive next steps of workflow and escalation based on response from SMS and email



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Trigger Points - Override

- Provides additional options to override a default notification using conditions
- Example – For all DBA escalations where type is Production, always escalate using Voice



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Lab 9 – Create On-Call Rota and Trigger Rule

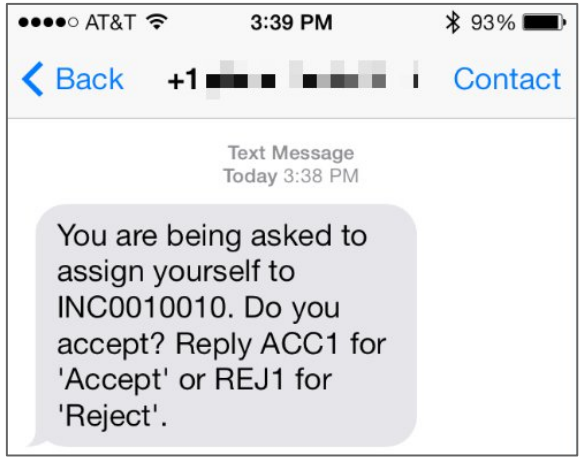
- Goal
  - Create a new On-Call Rotation for the Hardware team.
- Steps
  - Listed in Lab 9

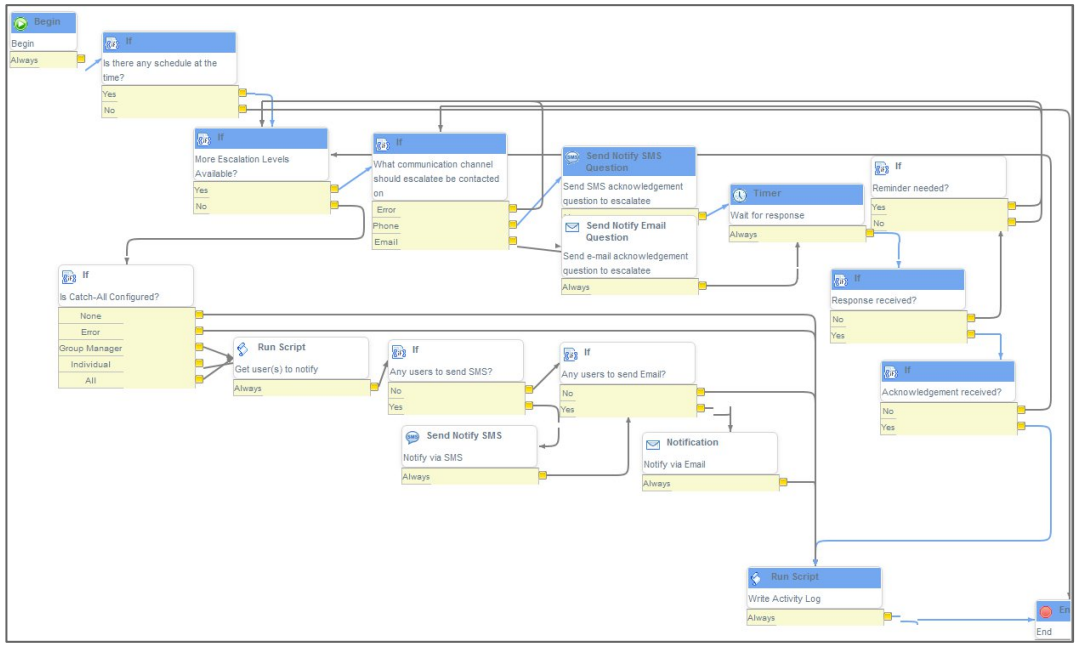
Network Schedule(s)	Roster	Shift	2014-03-13 Thursday
Network (EMEA)	Primary	23:00:00 - 07:00:00	David Dan
Network (Americas)	Primary	07:00:00 - 15:00:00	ITIL User
	Secondary	07:00:00 - 15:00:00	Fred Luddy
Network (APAC)	Primary	15:00:00 - 22:59:59	David Loo
	Secondary	15:00:00 - 22:59:59	Bow Ruggeri

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Lab 10 – Test hardware Rota

- Goal
  - Create an incident to test the new Hardware Rota created in Lab 9.
- Steps
  - Listed in Lab 10





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Top Takeaways

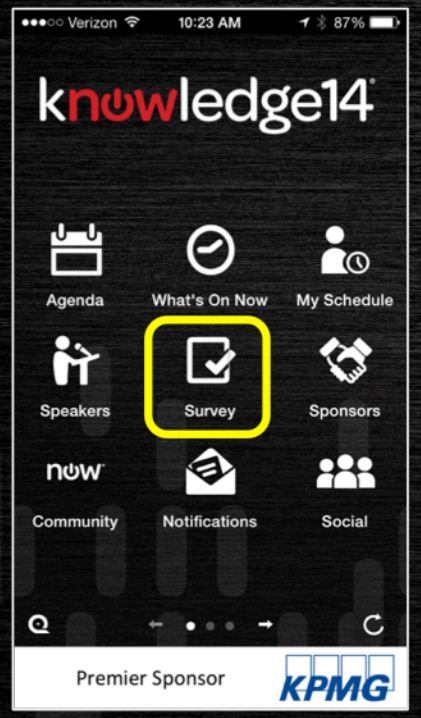
1. Incident Alert is a one stop place to manage communications for a major incident.

2. Communication doesn't have to be just email. Notify is a great add-on!

3. On-Call Rotations don't need to be maintained externally any longer.

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Thank You

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