knowledge16

Experience the Service Revolution



Advanced Communications Using SMS and Voice

MICHAEL RITCHIE
PLATFORM ARCHITECT
ServiceNow

DAVE KNIGHT
DIRECTOR, PLATFORM PRACTICE
ServiceNow

© 2016 ServiceNow All Rights Reserved

servicenow

Agenda

Lab Instance Setup Verification – Lab 1.0

Introduction to Notify

Lab Instance Setup – Labs 1.1 – 1.4

Lab Exercises 2.0 – 4.0

Introduction to On-Call Scheduling

Lab Exercises 5.0 – 5.1

Introduction to Advanced Notify Use Cases

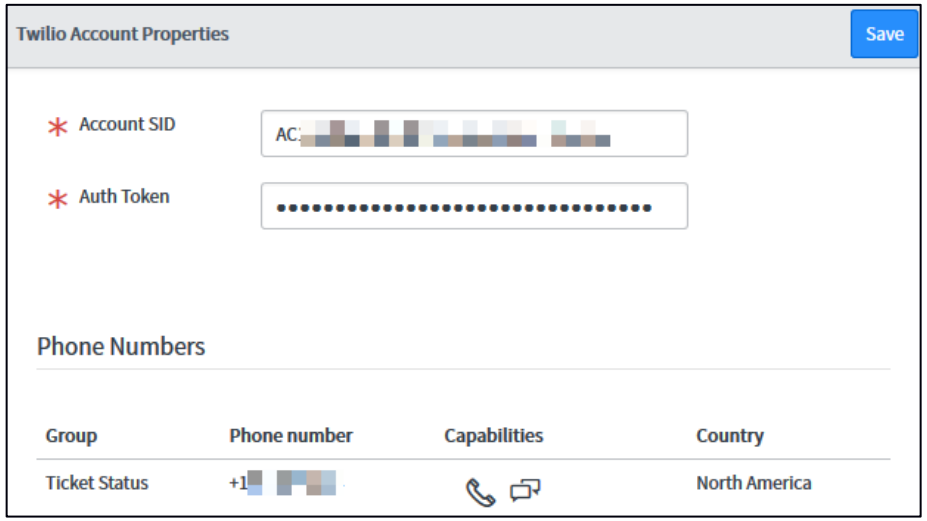
Lab Exercises 6.0 – 7.0

Demo of Password Reset SMS Verification using Notify

© 2016 ServiceNow All Rights Reserved

Lab 1.0 – Verify Notify Properties

- Goal
  - Ensure Notify is setup properly
- Steps
  - Follow steps in Lab 1.0
- Report Lab Progress
  - Lab Management\Report Lab Progress



© 2016 ServiceNow All Rights Reserved

ServiceNow Notify

A Brief Overview

© 2016 ServiceNow All Rights Reserved

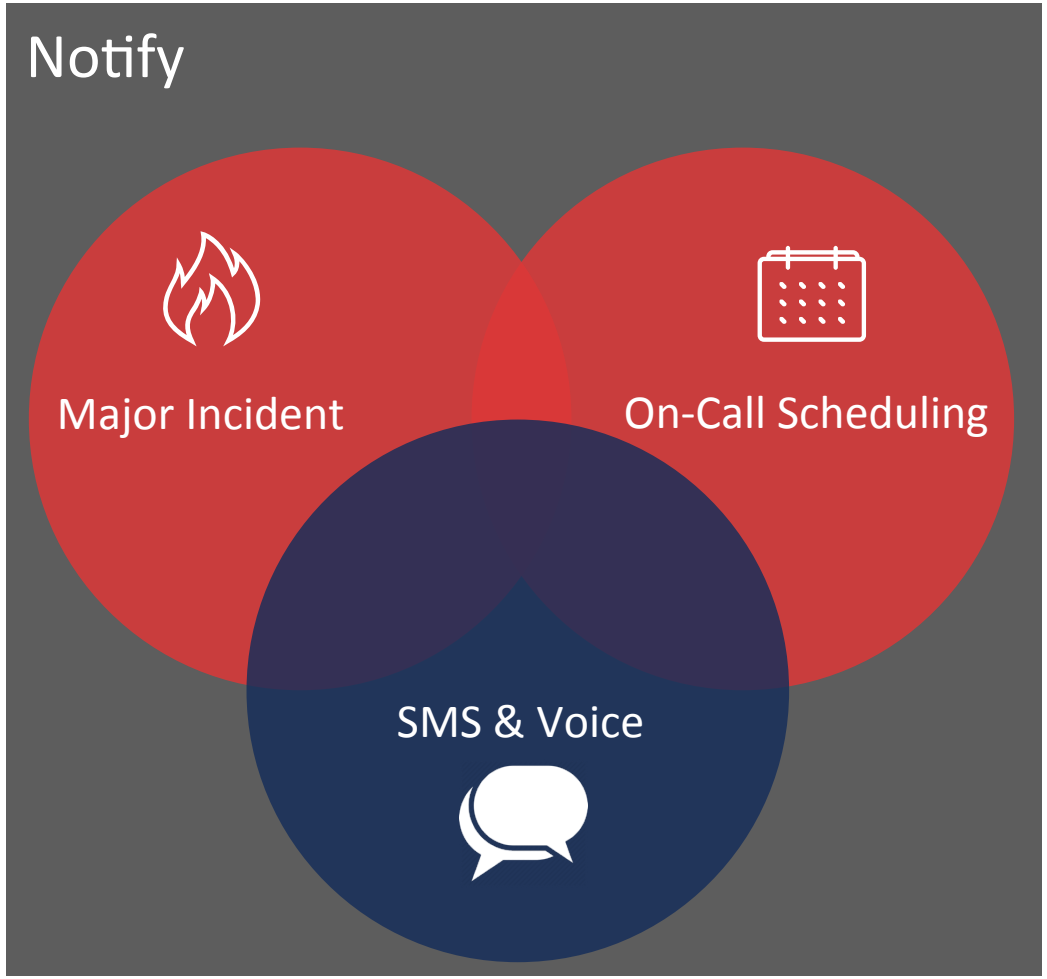
What Is Notify?

- Identify and mobilize resources with on-call scheduling
- Improve collaboration for major incidents
- Keep customers informed with better communication
- Add additional capabilities to Notify by combining it with:
  - Security Incident Response Management
  - Customer Service (OpenFrame capable Softphone and IVR)
  - Automated Password Reset
  - Custom applications

© 2016 ServiceNow All Rights Reserved

Why Notify?

1. Compress response and resolution timelines by quickly connecting people
2. Reduce downtime, achieve SLAs, and increase satisfaction
3. Fewer integrations means lower total cost of ownership when compared to other notification solutions
4. Powered by Twilio, a robust cloud communication infrastructure



© 2016 ServiceNow All Rights Reserved

Users, SMS and Voice

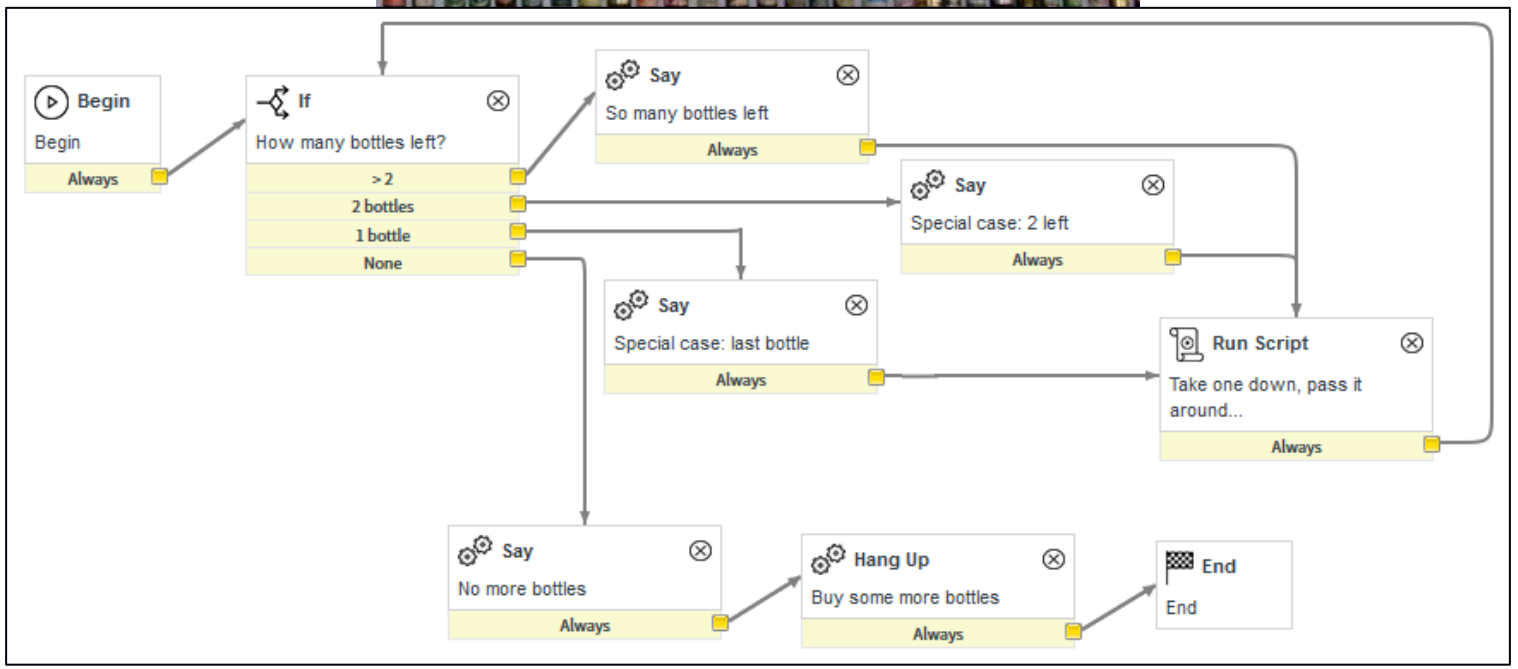
- Driven by device info registered as part of a users profile
  - Phone #'s have to be E.164 compliant
- Workflow triggers notification
  - Send SMS to mobile devices
  - Calls Phone # of user when adding to a conference call
- Bi-Directional Workflow
  - Provides options for 'Press 1' or 'Press 2' to drive and 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

© 2016 ServiceNow All Rights Reserved

Have you ever sung the song 99 beers on the wall?



Well ServiceNow Can!



© 2016 ServiceNow All Rights Reserved

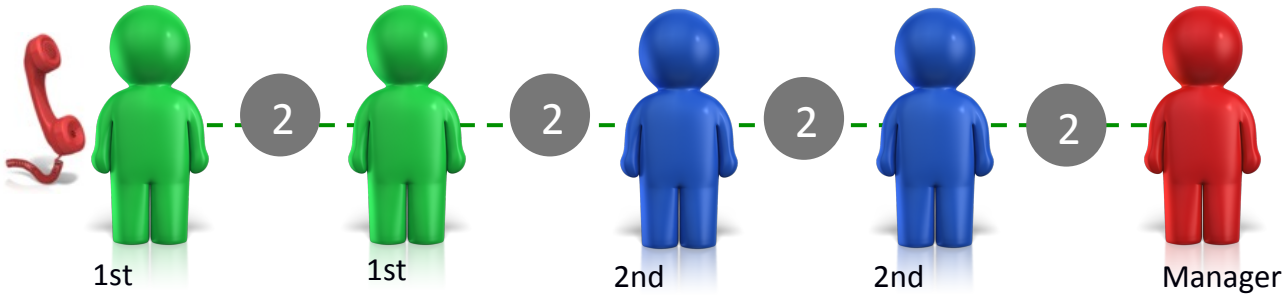
Let’s See/Hear That in Action

A Brief Demo

© 2016 ServiceNow All Rights Reserved

Now on Now – Notify on Hi Customer Service Instance

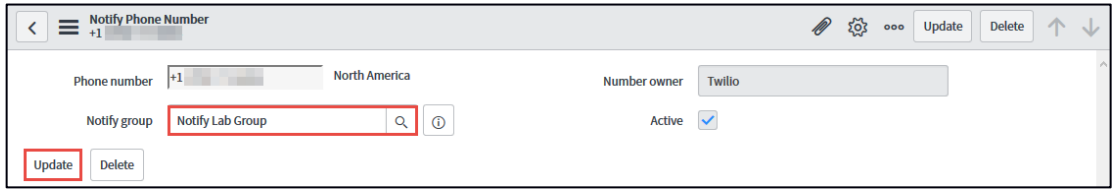
- We needed a better way to manage our critical incidents.
- Prior to implementing, our Site Reliability Engineers would spend 20 minutes manually calling down a spreadsheet of on-call engineers inviting them to a bridge if multiple teams needed to be engaged at once. This delayed MTTR on crucial incidents by at least 20 minutes.
- After initial contact, everyone would hang-up and redial into a standing bridge number – losing more time.
- With Notify, we use the On-call Scheduler Application instead of a spreadsheet to maintain schedules. It's easy for teams to keep up-to-date with vacations etc.
- Notify dials all invited engineers at once, and also sends SMS and email notifications to users alerting them to the bridge.
- The system auto "hunts" for backup on-call engineers if the primary doesn't answer within 2 minutes.



© 2016 ServiceNow All Rights Reserved

Lab 1.1 – Setup Notify Number Group

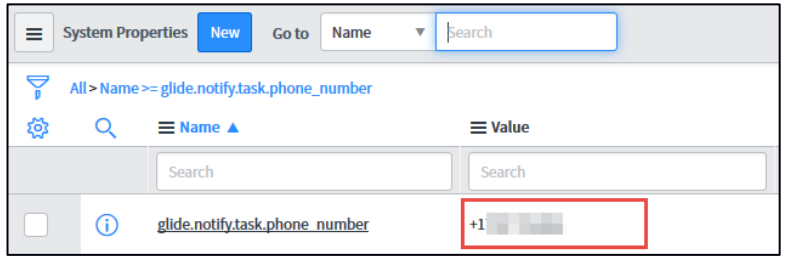
- Goal
  - Setup Twilio number for inbound and outbound communications
- Steps
  - Follow steps in Lab 1.1
- Report Lab Progress
  - Lab Management\Report Lab Progress



© 2016 ServiceNow All Rights Reserved

Lab 1.2 – Set Notify System Property

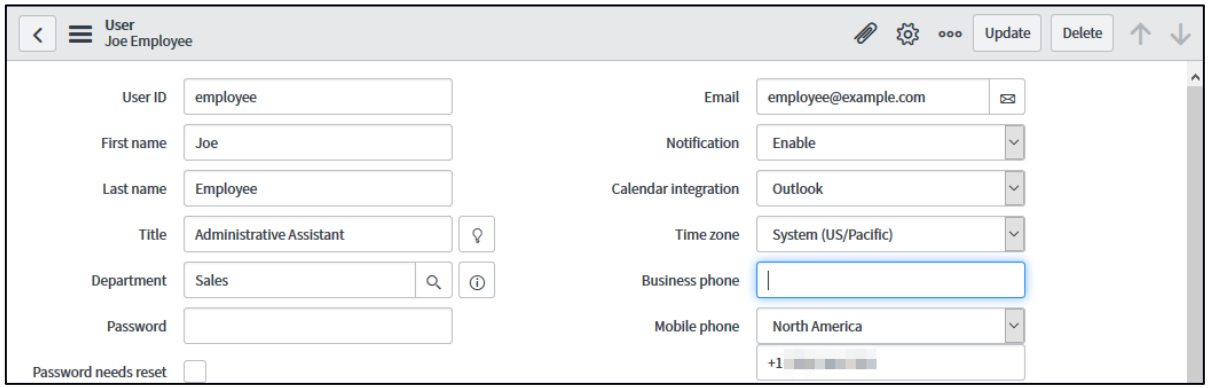
- Goal
  - Set system property that will enable SMS and Conference calling from any task
- Steps
  - Follow steps in Lab 1.2
- Report Lab Progress
  - Lab Management\Report Lab Progress

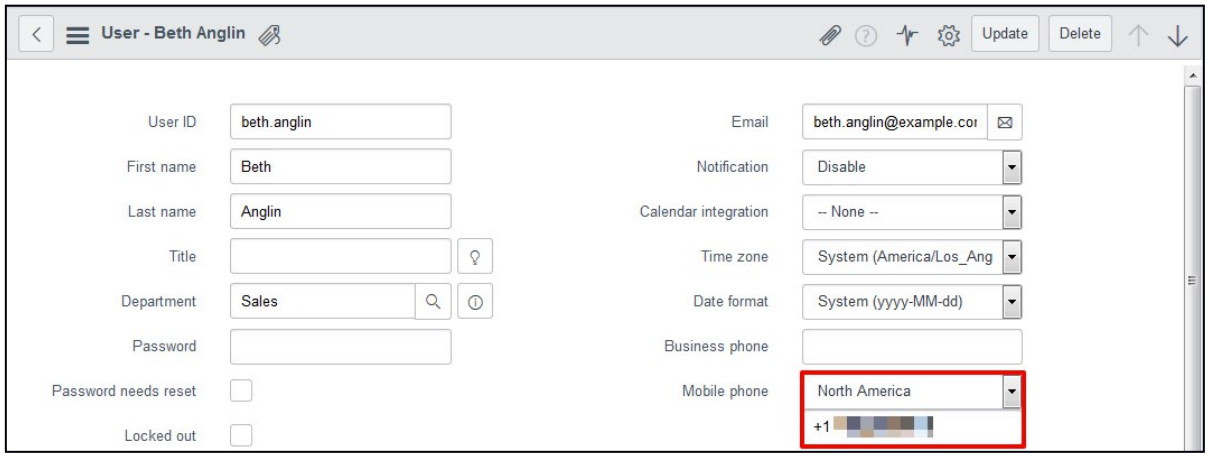


© 2016 ServiceNow All Rights Reserved

Lab 1.3 – Update users

- Goal
  - Update the Mobile Phone Field Type on the User table to Phone Number (E.164)
  - Update OOB Users with your Mobile Phone:
    - Joe Employee
    - Beth Anglin
- Steps
  - Follow steps in Lab 1.3
- Report Lab Progress
  - Lab Management\Report Lab Progress

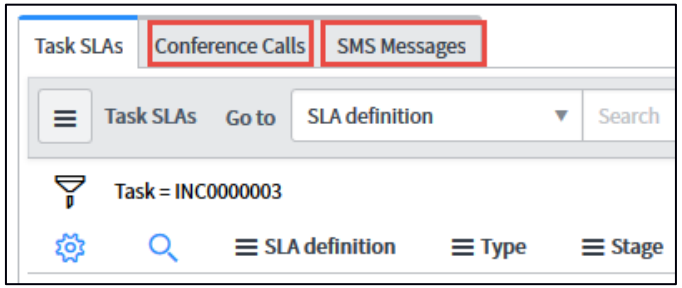




© 2016 ServiceNow All Rights Reserved

Lab 1.4 – Modify Incident Form

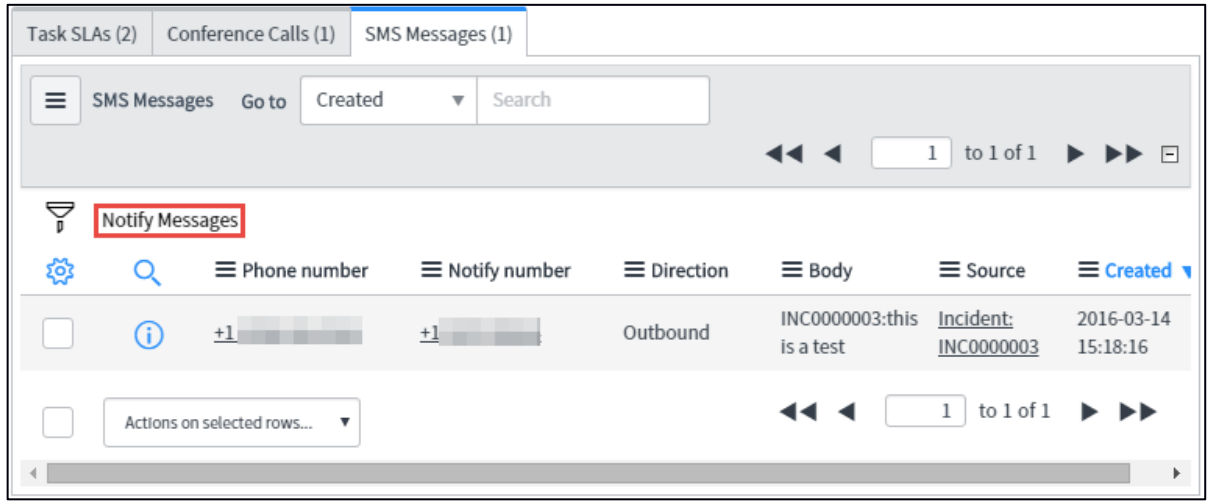
- Goal
  - Add 2 related lists to the Incident Form
- Steps
  - Follow steps in Lab 1.4
- Report Lab Progress
  - Lab Management\Report Lab Progress



© 2016 ServiceNow All Rights Reserved

Lab 2.0 – Send SMS from Incident

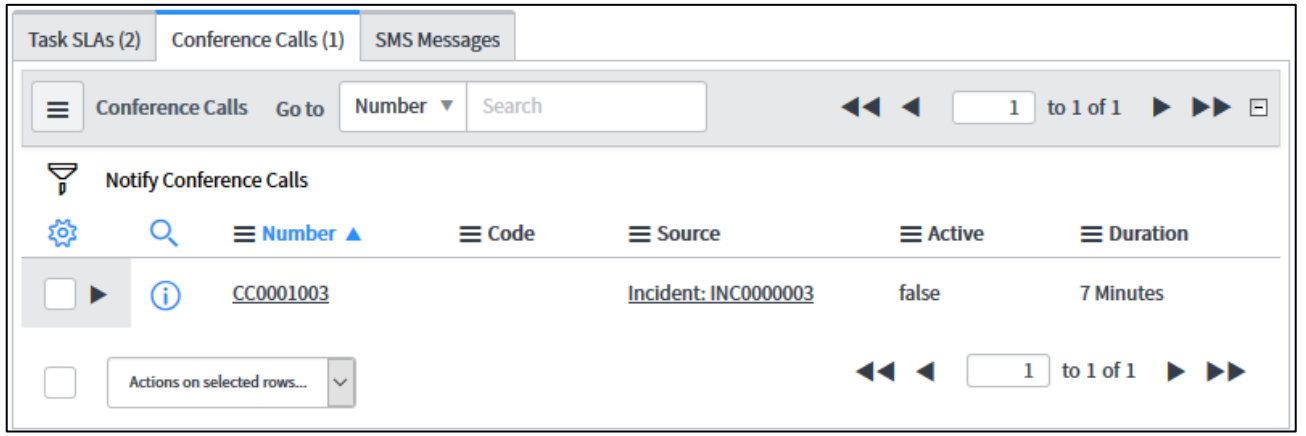
- Goal
  - Send SMS directly from any incident and track all communications from that incident
- Steps
  - Follow steps in Lab 2.0
- Report Lab Progress
  - Lab Management\Report Lab Progress



© 2016 ServiceNow All Rights Reserved

Lab 3.0 – Start and Manage Conference Call

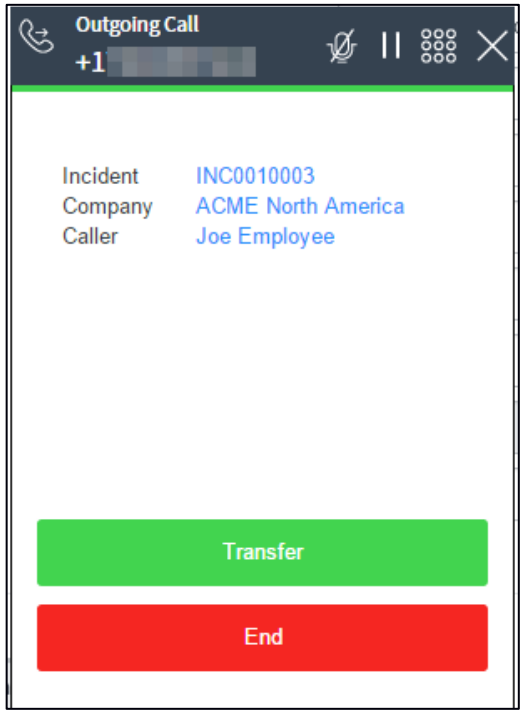
- Goal
  - Initiate a conference call directly from an incident, manage and track the participants on the call
- Steps
  - Follow steps in Lab 3.0
- Report Lab Progress
  - Lab Management\Report Lab Progress



© 2016 ServiceNow All Rights Reserved

Lab 4.0 – Initiate Call from Task

- Goal
  - Initiate a call directly through the instance to the incident caller.
- Steps
  - Follow steps in Lab 4.0
- Report Lab Progress
  - Lab Management\Report Lab Progress



© 2016 ServiceNow All Rights Reserved

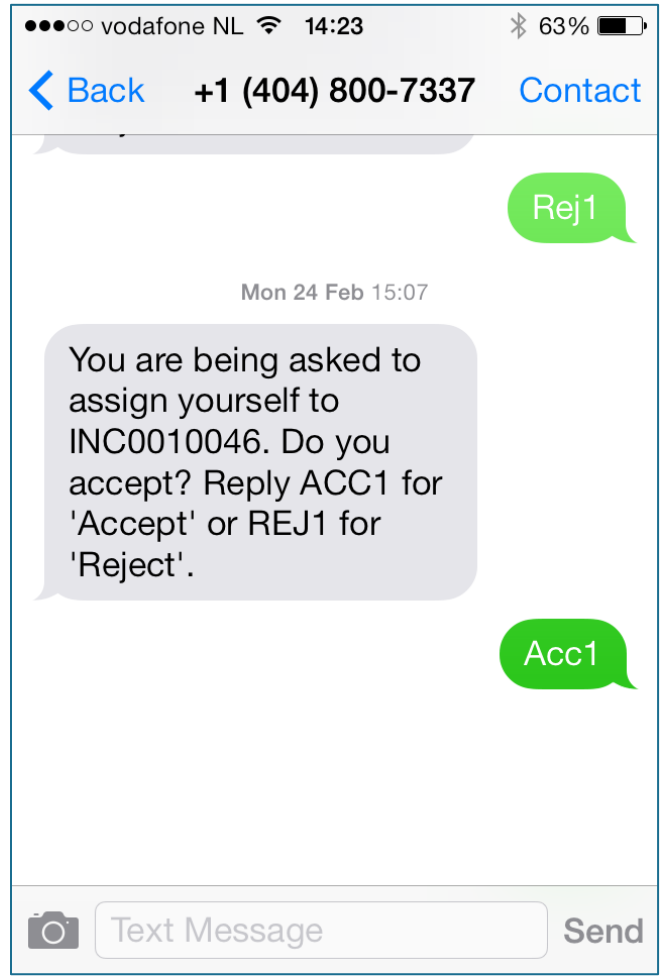
ServiceNow On-Call Scheduling

A Brief Overview

© 2016 ServiceNow All Rights Reserved

Use Case for On-Call Scheduling

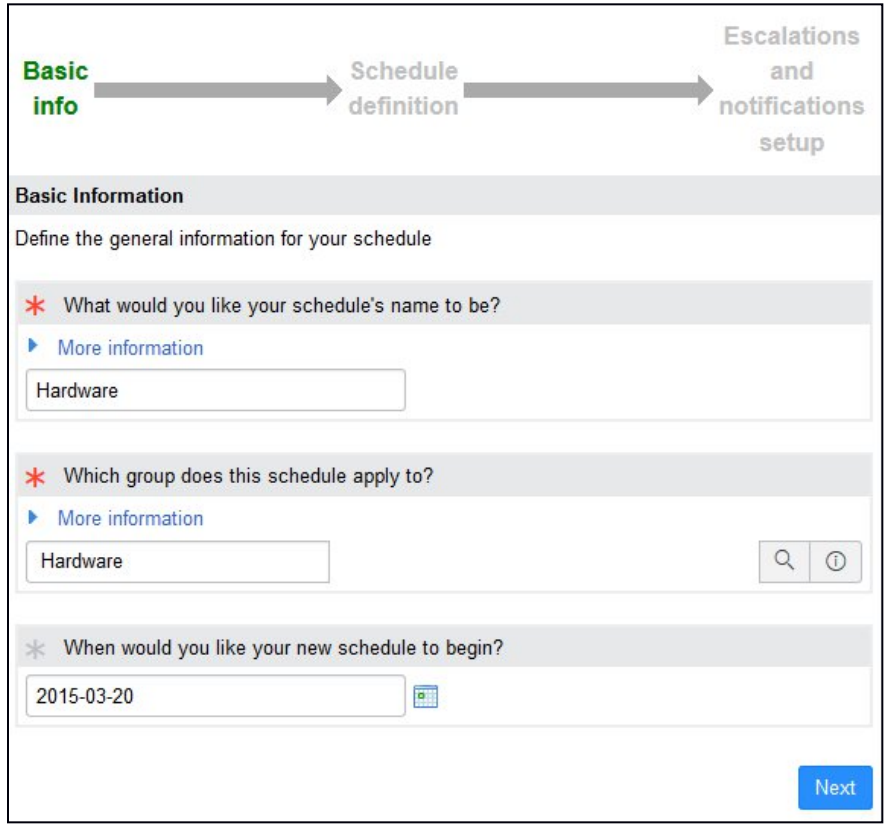
- 'SAP Financial Accounting' Business Service has an Outage
  - P1 Incident logged against the SAP's CI at 14:00
  - Incident's data will satisfy a 'trigger' which will do two things
    - Assign the incident to the group "SAP Services"
    - Start the workflow: Assignment by Acknowledgement
  - The 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

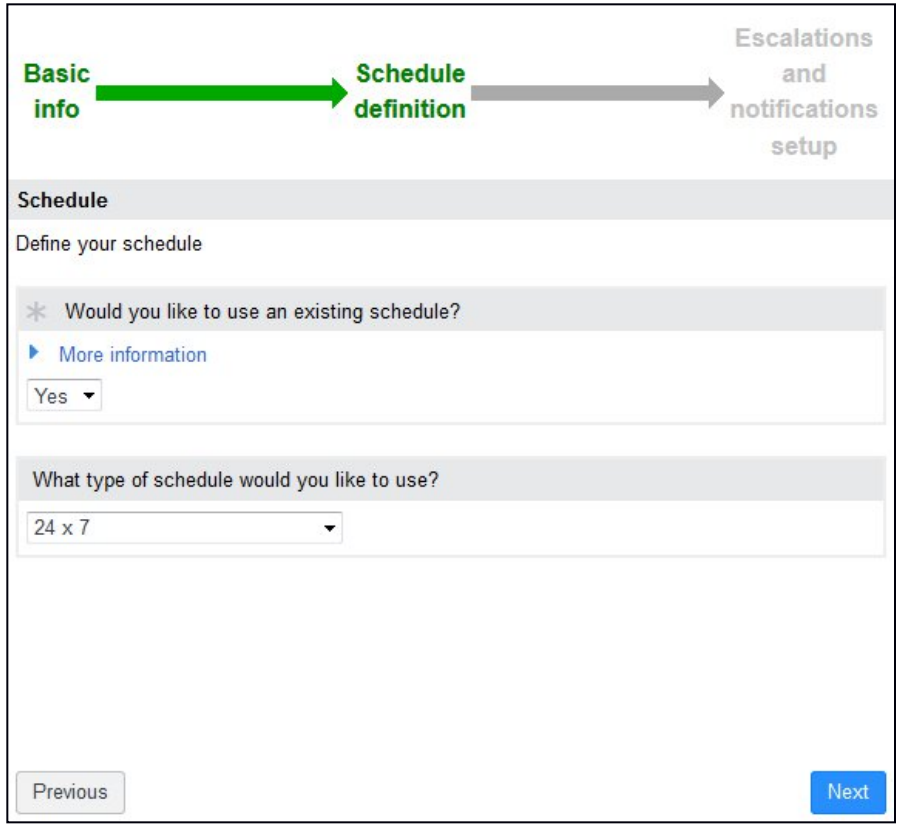


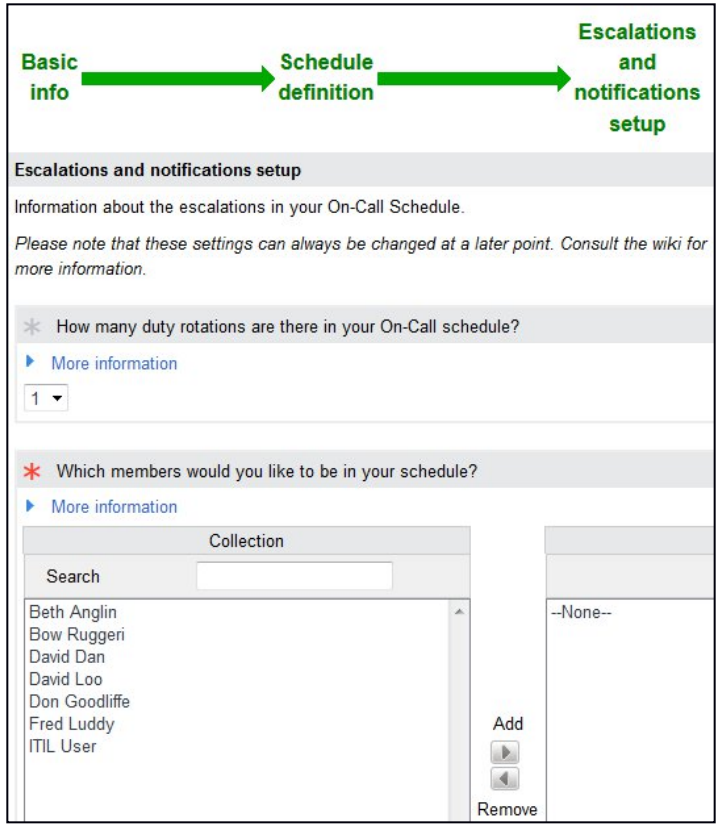
© 2016 ServiceNow All Rights Reserved

New Schedule Creation Wizard

- Create new Schedules
- Multiple rosters
- Select members







© 2016 ServiceNow All Rights Reserved

Reporting and Email Reminders

Network Schedule(s)	Roster	Shift	2015-03-20 Friday	2015-03-21 Saturday	2015-03-22 Sunday	2015-03-23 Monday	2015-03-24 Tuesday	2015-03-25 Wednesday	2015-03-26 Thursday	2015-03-27 Friday
Network (EMEA)	Primary	00:00:00-08:00:00	David Dan	David Dan	David Dan	David Dan	David Dan	David Dan	David Dan	David Dan
Network (Americas)	Primary	08:00:00-16:00:00	Fred Luddy	Fred Luddy	Fred Luddy	ITIL User	ITIL User	ITIL User	ITIL User	ITIL User
	Secondary	08:00:00-16:00:00	ITIL User	ITIL User	ITIL User	Fred Luddy	Fred Luddy	Fred Luddy	Fred Luddy	Fred Luddy
Network (APAC)	Primary	16:00:00-23:59:59	Bow Ruggeri	Bow Ruggeri	David Loo	David Loo	David Loo	David Loo	David Loo	David Loo
	Secondary	16:00:00-23:59:59	David Loo	David Loo	Bow Ruggeri	Bow Ruggeri	Bow Ruggeri	Bow Ruggeri	Bow Ruggeri	Bow Ruggeri

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

© 2016 ServiceNow All Rights Reserved

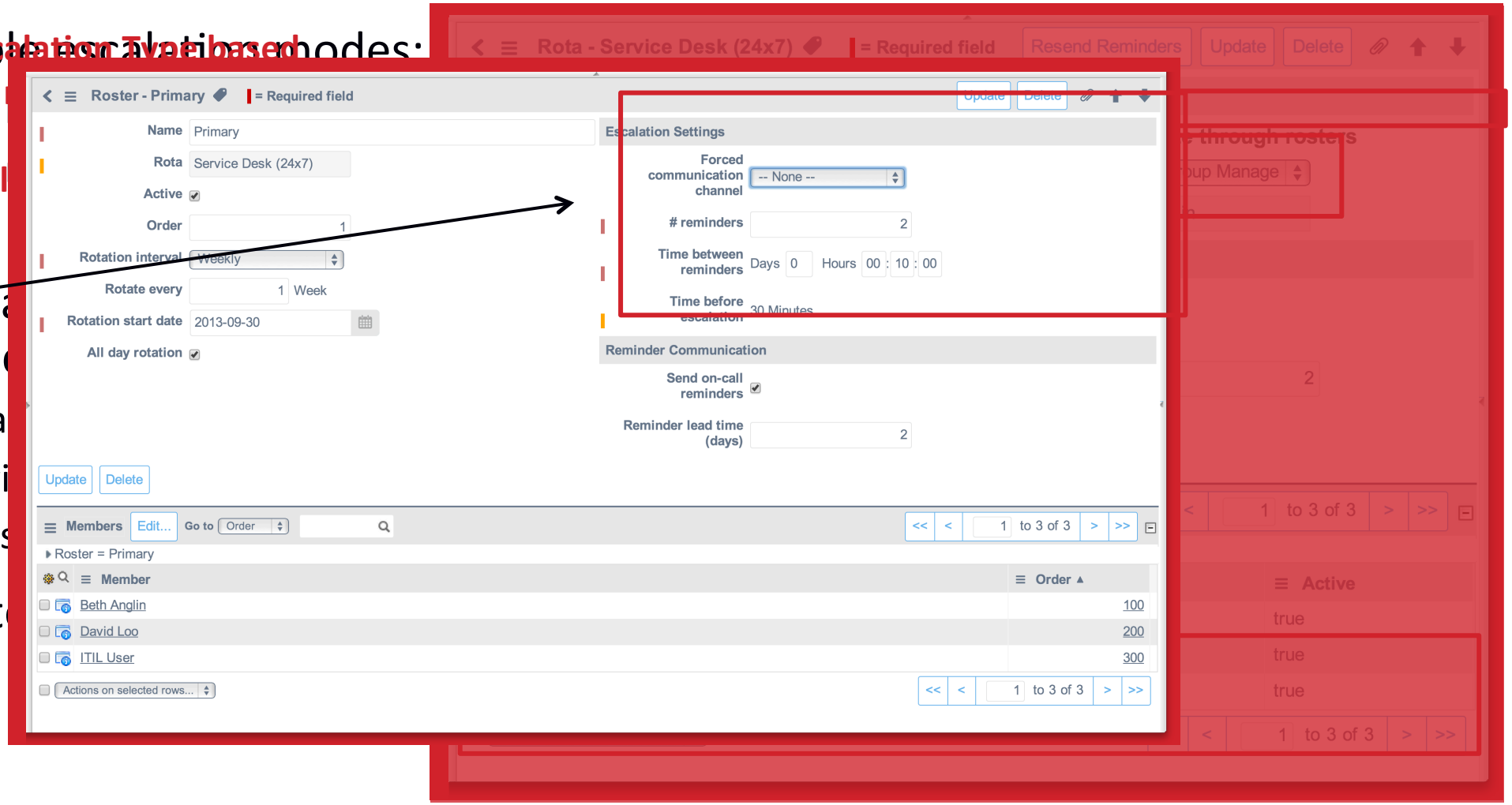
Group Rotation Escalation

- Support multiple escalation modes:
  - Rotate through
  - Rotate through
  - No Escalations
- Allows a final ca
  exhausted. Cat
  - The Group's Ma
  - Dedicated Indivi
  - All the members
- Allows the roste

Escalation Type based on

Catch-all

Escalation Settings per Roster

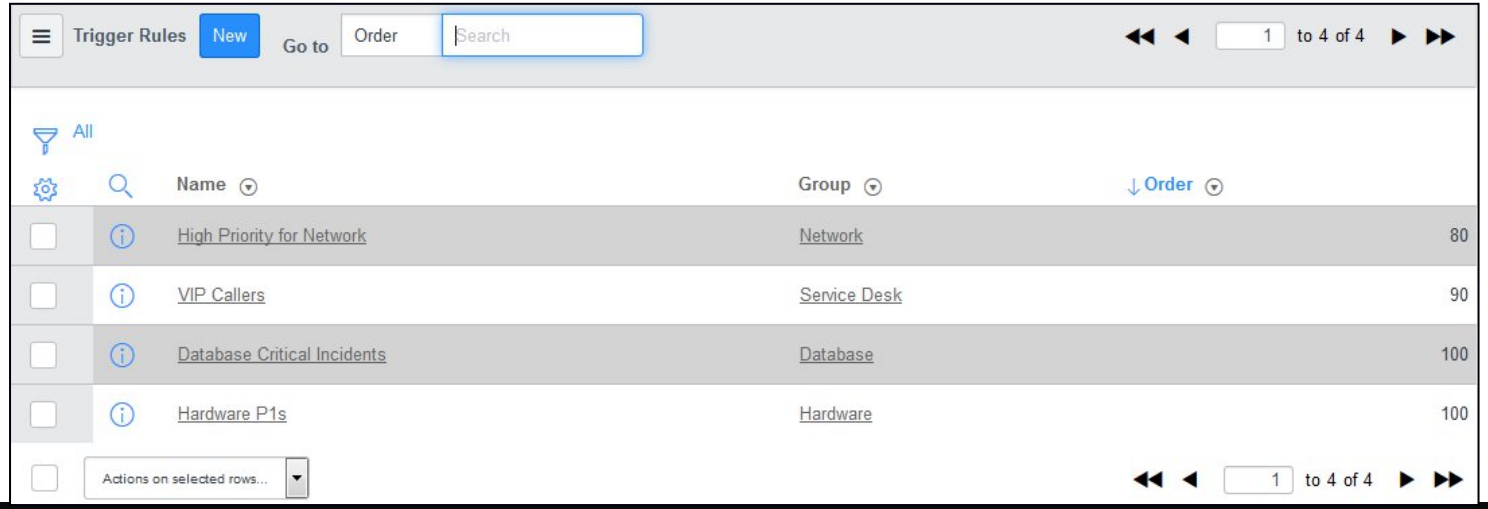


© 2016 ServiceNow All Rights Reserved

Trigger Rules

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

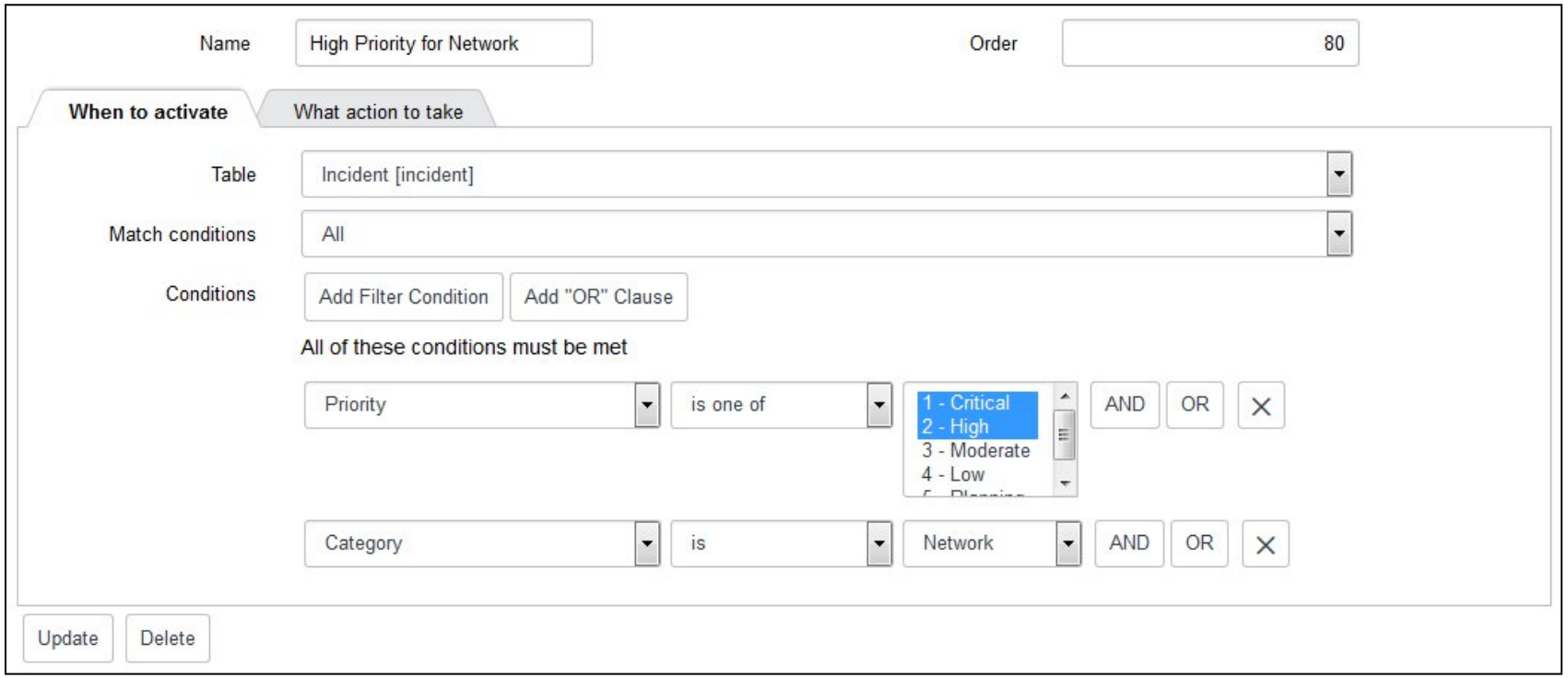
- Simple UI to generate rules that drive workflow around escalation
- Can be defined on a per group basis
- Rules can be set to be followed in a specific order
  - Example: Decreasing granularity or specificity to ensure that there is always a default to escalate to in the event on no response



© 2016 ServiceNow All Rights Reserved

Granular Conditions for When to Escalate

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

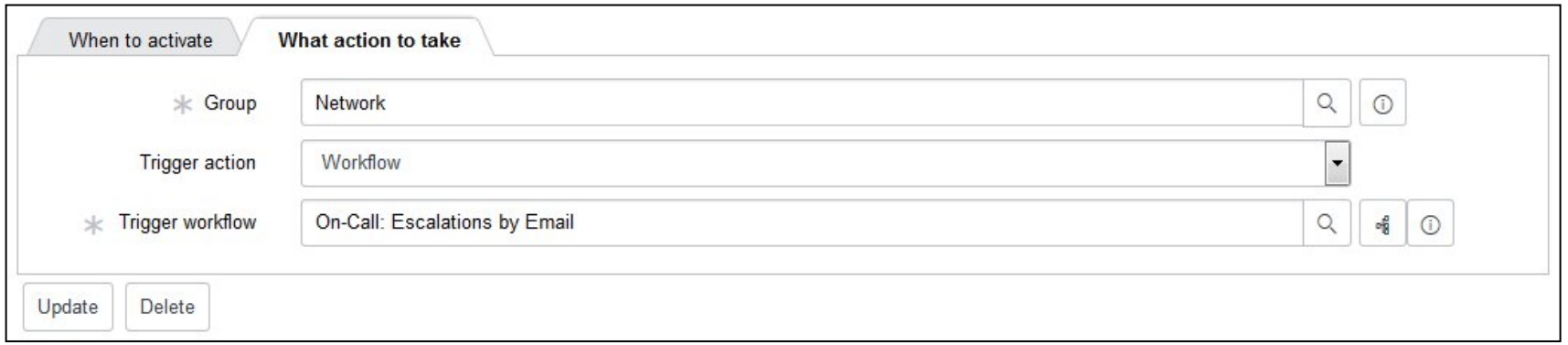


© 2016 ServiceNow All Rights Reserved

Granular Conditions for When to Escalate

When the rule is triggered what should the system do

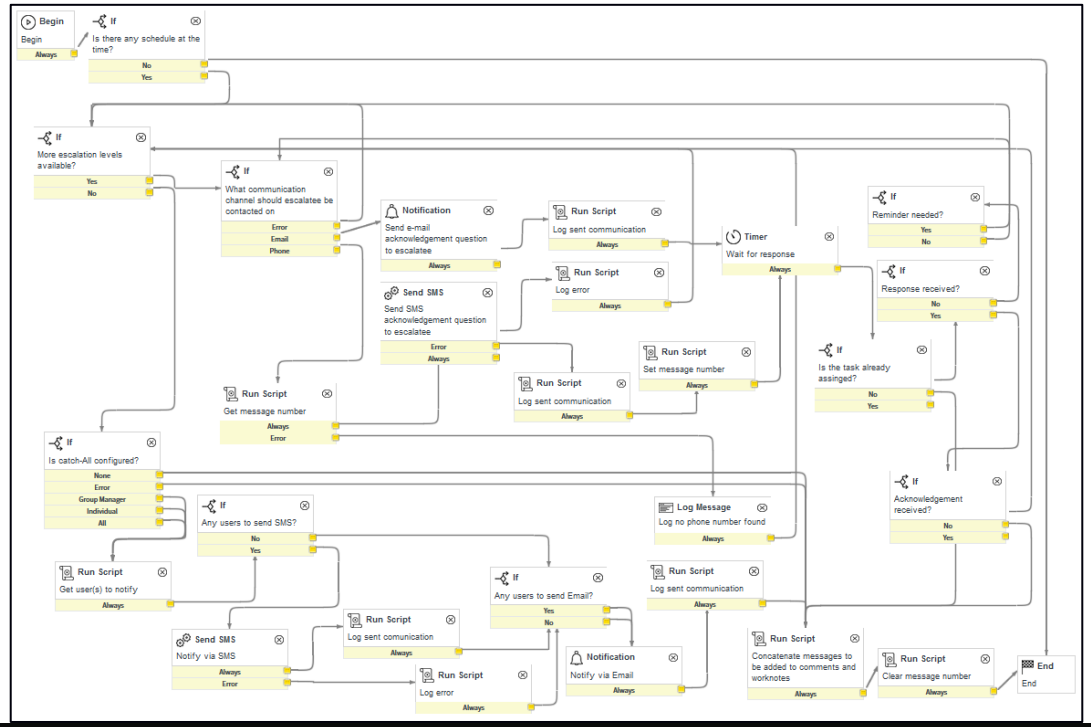
- Assign ticket to specific assignment group
- Trigger Workflow to follow more granular routing or steps
  - Assign
  - Assign and Notify *
  - Assign by Acknowledgment *
  - Escalations by Email
- Can also trigger a script to drive more complex routing or logic conditions
  - Example – If trigger is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



© 2016 ServiceNow All Rights Reserved

Workflow

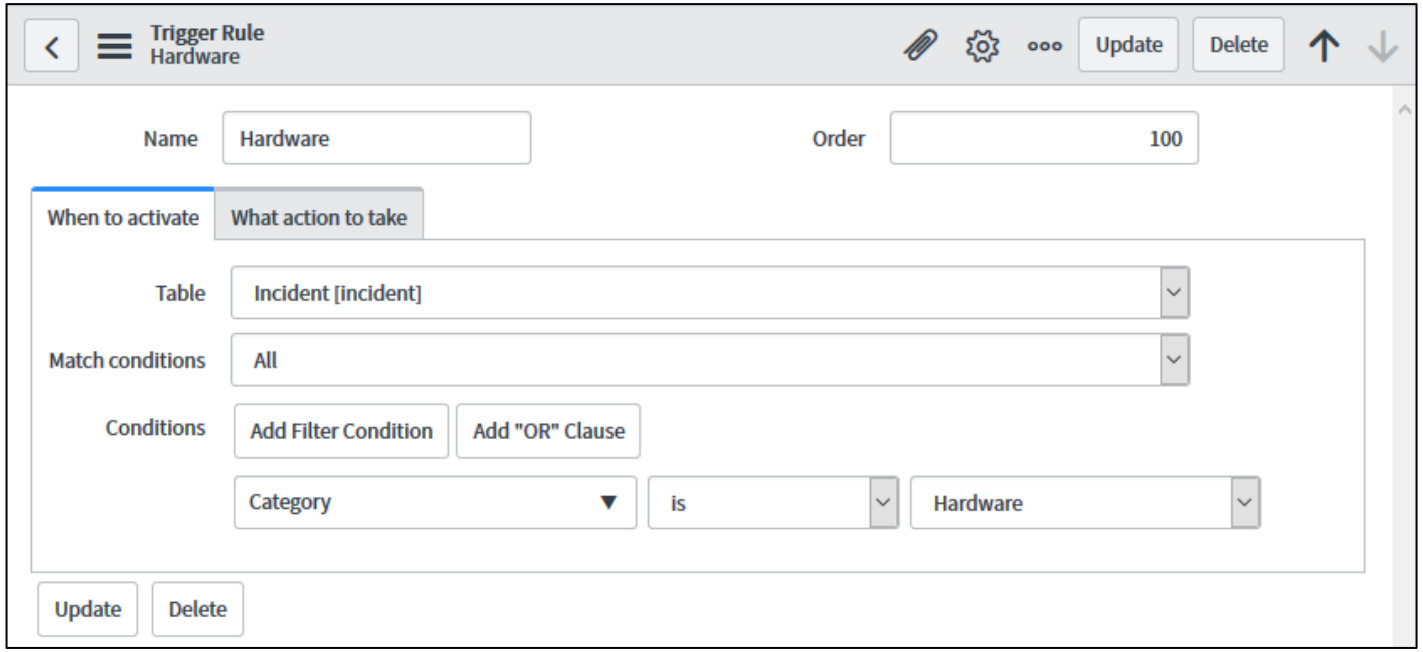
- Use workflow to build and define process for managing escalation and assignments
- Include notification and escalation triggers
- Provides the ability to include email and SMS options into the workflow for notification
- Logic to drive next steps of workflow and escalation based on response from SMS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



© 2016 ServiceNow All Rights Reserved

Lab 5.0 – Create On-Call Rota and Trigger Rule

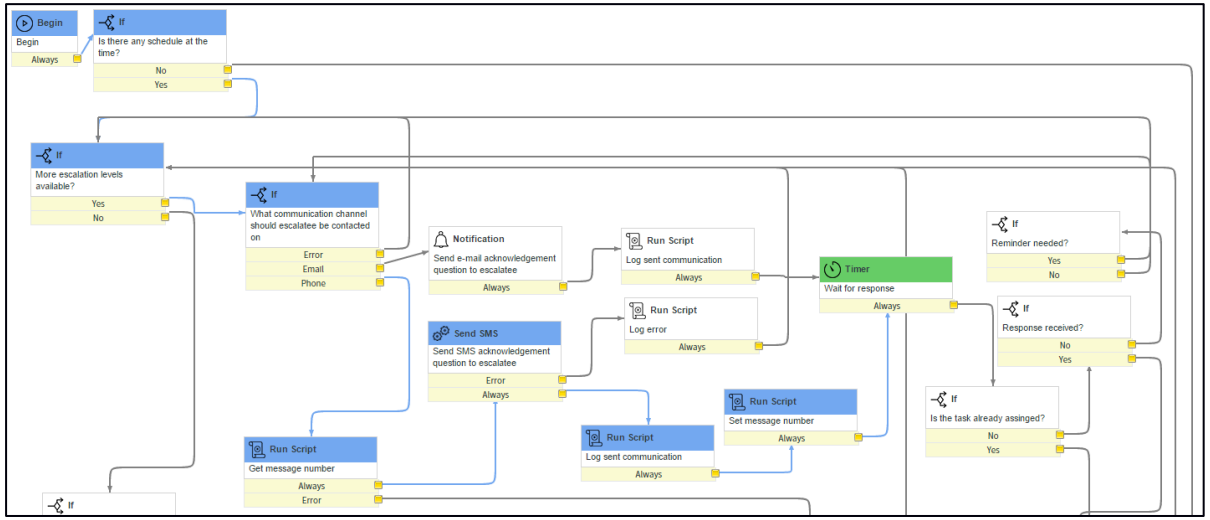
- Goal
  - Create a new On-Call Rotation for the Hardware team
- Steps
  - Listed in Lab 5.0
- Report Lab Progress
  - Lab Management\Report Lab Progress

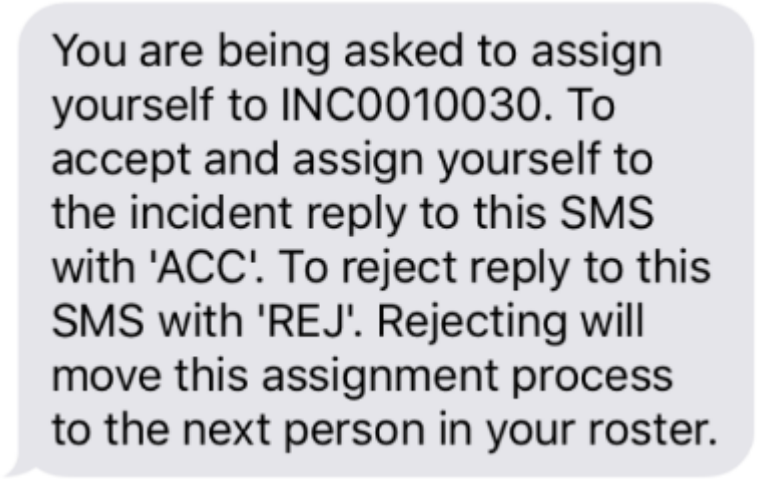


© 2016 ServiceNow All Rights Reserved

Lab 5.1 – Test Hardware Rota

- Goal
  - Create an incident to test the new Hardware Rota created in Lab 5.0
- Steps
  - Listed in Lab 5.1
- Report Lab Progress
  - Lab Management\Report Lab Progress





© 2016 ServiceNow All Rights Reserved

Advanced Notify Use Cases

A Brief Overview

© 2016 ServiceNow All Rights Reserved

Advanced Notify Use Cases

- Batch Workload Automation
  - Workload Automation (Job Scheduling) is a computer application for controlling unattended background program execution (commonly called batch processing)
  - The Problem:
    - High volume of jobs per month
    - Ineffective, Manual Response to remediate job failures
    - High Failure Rate - majority of the Job failures result in Job Restart
  - The Solution:
    - Drive automated response via Event Management, Workflow, Notify with increased SLA accountability
- End User Task Status
  - Some end users prefer voice: provide a mechanism to call, enter ticket number, and receive ticket status
  - Could be leveraged for long change implementations

© 2016 ServiceNow All Rights Reserved

Customer Use Case

- Challenges
  - Numerous monitoring tools with limited or no integration
  - No comprehensive operations risk view
- Business Drivers
  - Improve Mean Time to Repair and improve performance SLA's
  - Lower TCO
- Solution
  - ServiceNow Event Management, Knowledge Management, Incident Management, On-Call scheduling, Workflow, Notify, Dashboards and Analytics

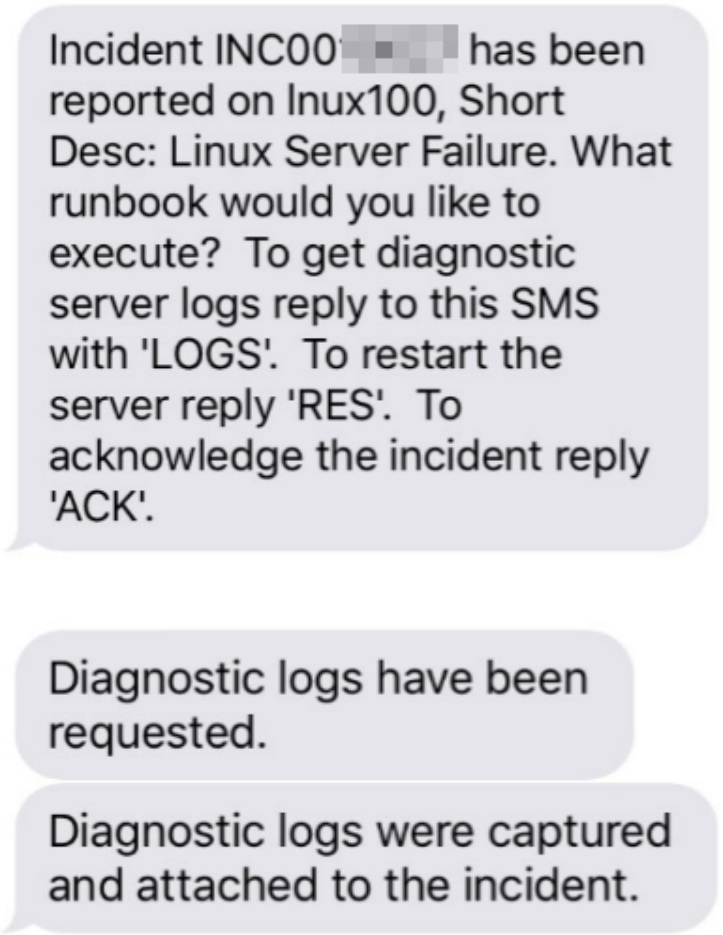


- Scotiabank's Session is today at 3:50 PM!
  - Title: Scotiabank – GEMS (Global Event Management Solution)

© 2016 ServiceNow All Rights Reserved

Lab 6.0 – Orchestration with Notify

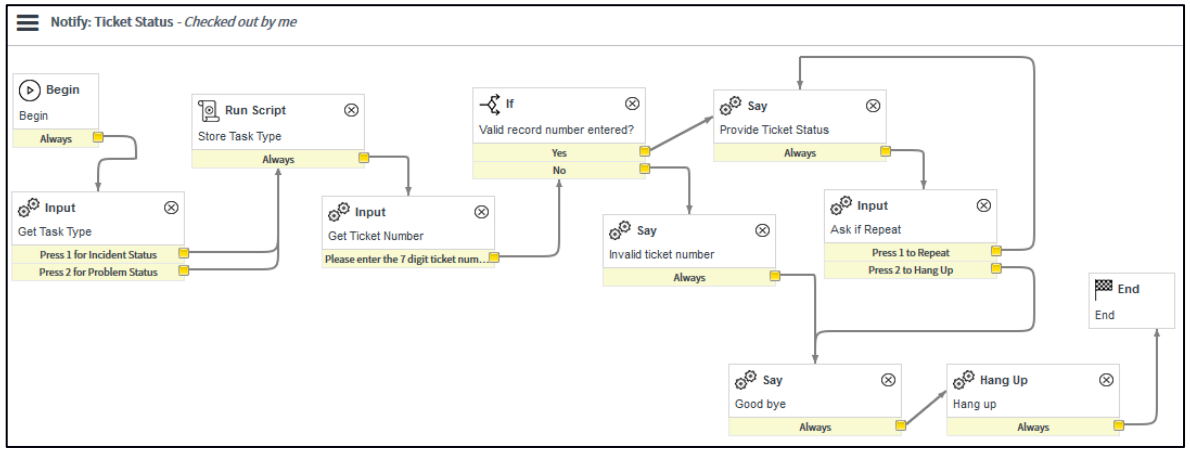
- Goal
  - Create workflow allowing incident assignee to take action on an incident via SMS
- Steps
  - Listed in Lab 6.0
- Report Lab Progress
  - Lab Management\Report Lab Progress



© 2016 ServiceNow All Rights Reserved

Lab 7.0 – Ticket Status via Voice

- Goal
  - Setup a workflow allowing users to call for incident and problem ticket status
- Steps
  - Listed in Lab 7.0
- Report Lab Progress
  - Lab Management\Report Lab Progress



© 2016 ServiceNow All Rights Reserved

Top Takeaways

1. Communication doesn't have to be just email. Notify is a great add-on!
2. SMS and Conference Calls can be initiated from any task.
3. On-Call Rotations don't need to be maintained externally any longer.

© 2016 ServiceNow All Rights Reserved

Take the Survey

Please take a moment to complete a session survey in the Knowledge16 app.

Thank You

Michael Ritchie

Platform Architect

ServiceNow

michael.Ritchie@servicenow.com

Dave Knight

Director Platform Practice

ServiceNow

dave.knight@servicenow.com

#Know16

© 2016 ServiceNow All Rights Reserved