knowledge17

http://clabs.link/lab131993

WORK at LIGHTSPEED

Advanced Communications Using SMS and Voice

Michael Ritchie
Sr. Platform Architect
Servicenow

Michael Slabodnick
Sr. Solution Consultant
ServiceNow

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servicenow

Speaker Introduction



NAME: Michael Ritchie

TITLE: Senior Platform Architect

COMPANY: ServiceNow

EXPERIENCE: Almost 6 years at ServiceNow

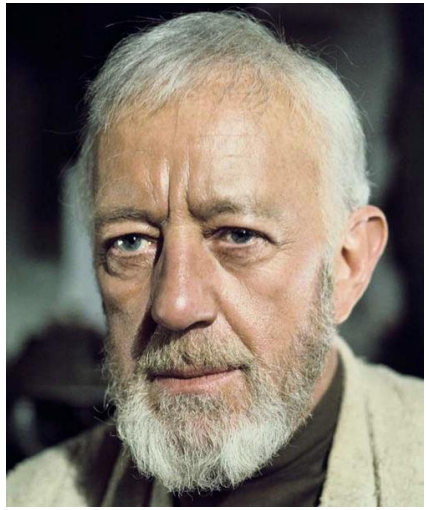
EXPERTISE: ITIL, ITSM, Application Development

ACHIEVEMENTS: Directed many movies including Bad News Bears, Fletch, Golden Child. Part of a Patent on Configuration Management

CURRENT PROJECTS: Enabling customers on ServiceNow Development

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Speaker Introduction



NAME: Michael Slabodnick

TITLE: Senior Solution Consultant

COMPANY: ServiceNow

EXPERIENCE: 2 years at ServiceNow, 6 years working on the ServiceNow Platform

EXPERTISE: ITIL Expert, ServiceNow ITSM & Platform Development

ACHIEVEMENTS: Dental School Reject

CURRENT PROJECTS: ITSM & ITIL Enablement, ServiceNow Development

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Agenda

Out of the Box Scenarios

- Lab Instance Setup – Labs 1.0 – 1.1
- Introduction to Notify
- Notify Setup Discussion and Demonstration
- Notify on Task
  - Lab Exercises 2.0 – 5.0
- Introduction to On-Call Scheduling
  - Lab Exercises 6.0 – 6.1
- Call Center for Incident Management
  - Lab Exercise 7.0

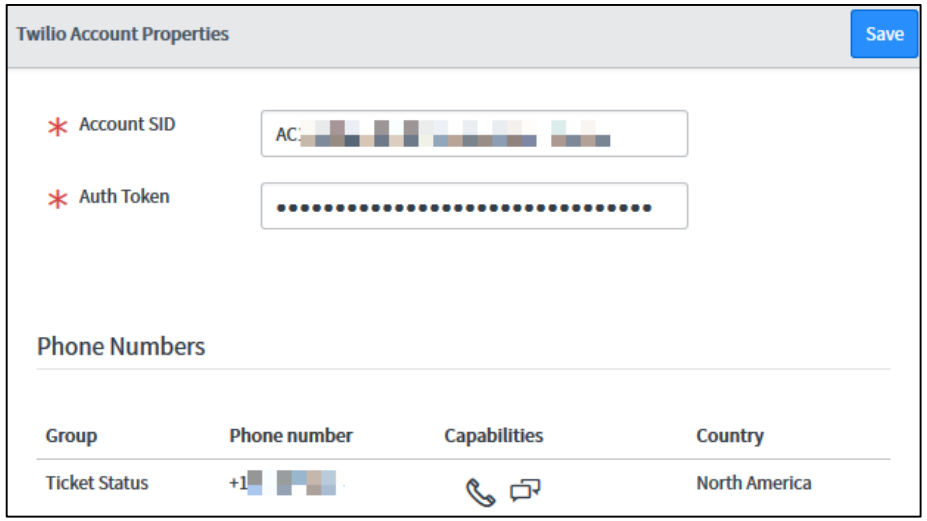
Advanced Use Cases

- Ticket Status via Text to Voice
  - Lab Exercise 8.0
- ServiceNow Orchestration with Notify
  - Lab Exercise 9.0

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Lab 1.0 – Verify Notify Properties

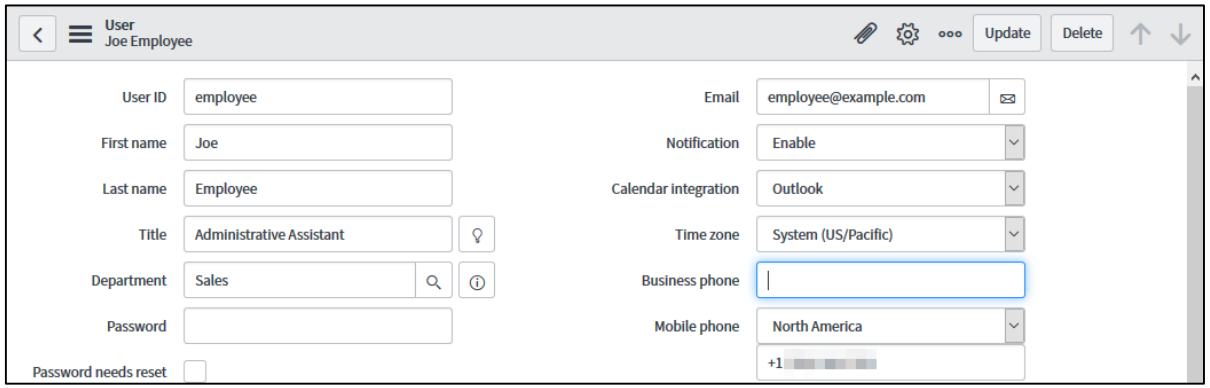
- Goal
  - Ensure Notify is set up properly
- Steps
  - Follow steps in Lab 1.0
- Report Lab Progress
  - Lab Management/Report Lab Progress

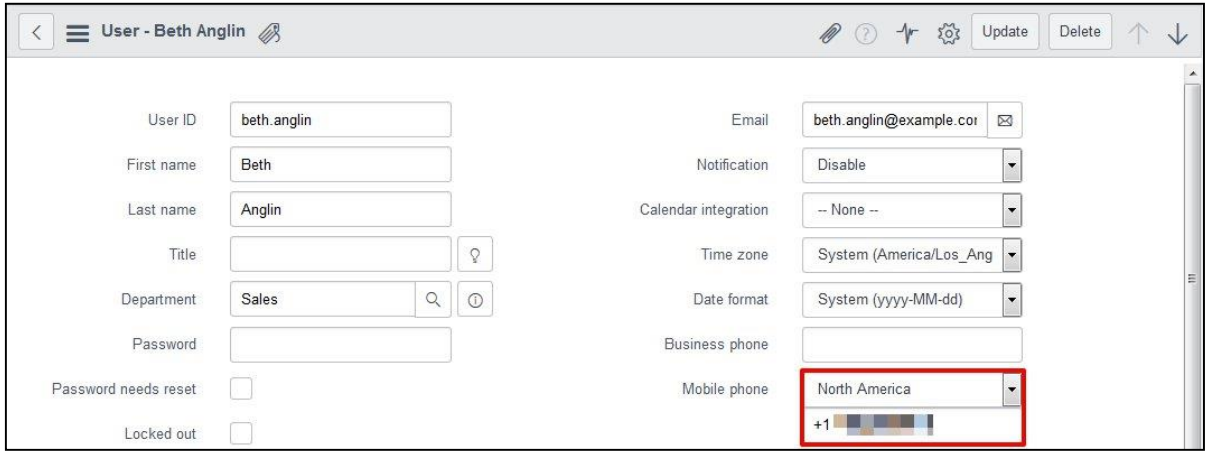


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Lab 1.1 – Update Users

- Goal
  - Text your instance to automatically update OOB users with your mobile phone:
    - Joe Employee
    - Beth Anglin
- Steps
  - Follow steps in Lab 1.1
- Report Lab Progress
  - Lab Management/Report Lab Progress





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ServiceNow Notify

A Brief Overview

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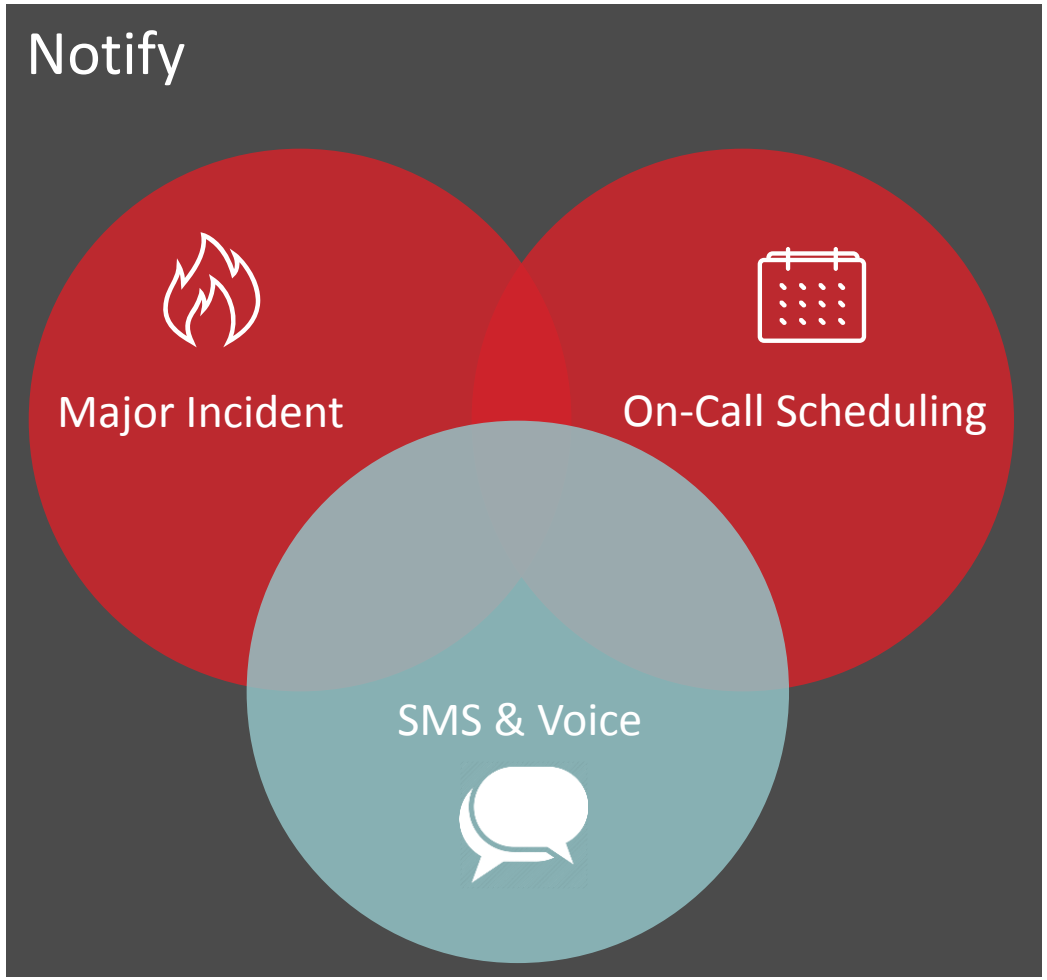
What Is Notify?

- 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

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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



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Users, SMS, and Voice

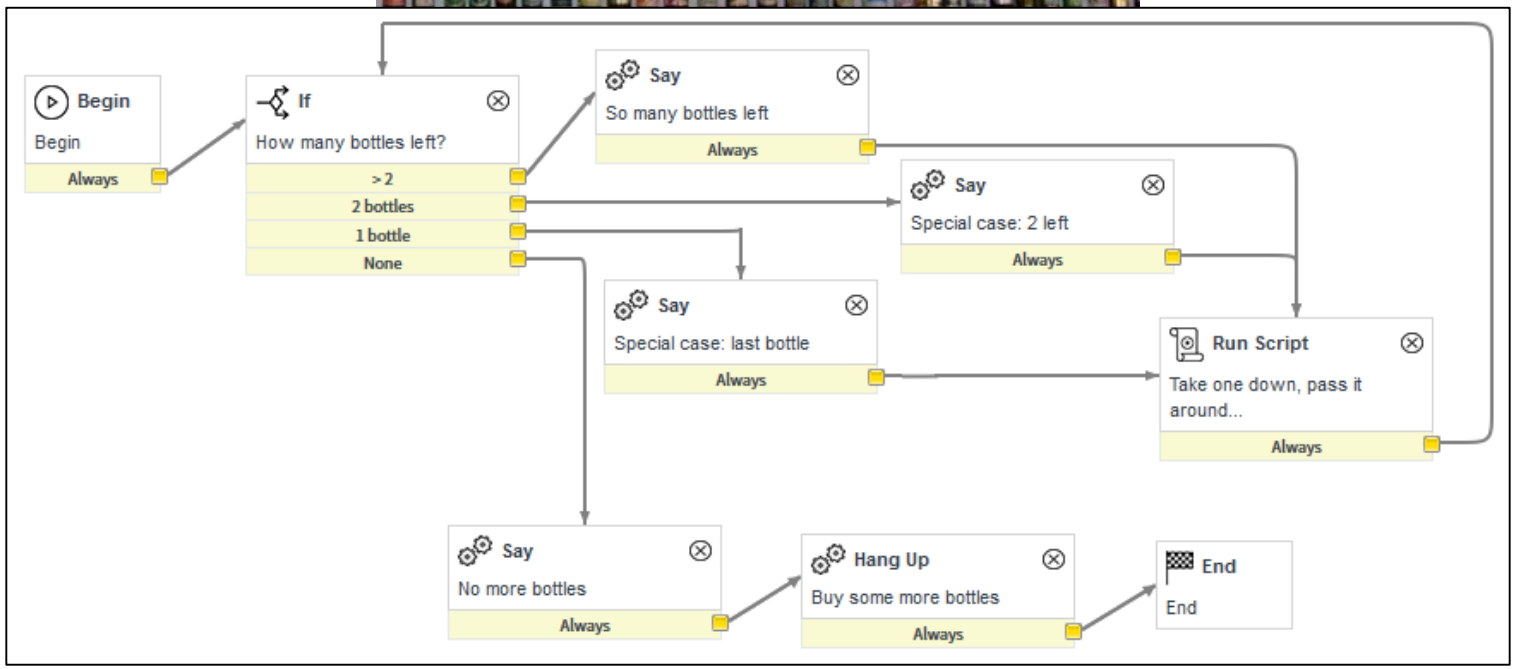
- Driven by device info registered as part of a user's profile
  - Phone numbers have to be E.164-compliant
- Workflow triggers notification
  - Send SMS to mobile devices
  - Calls phone numbers of user when adding to a conference call
- Bi-Directional Workflow
  - Provides options for 'Press 1' or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

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



Well, ServiceNow Can!



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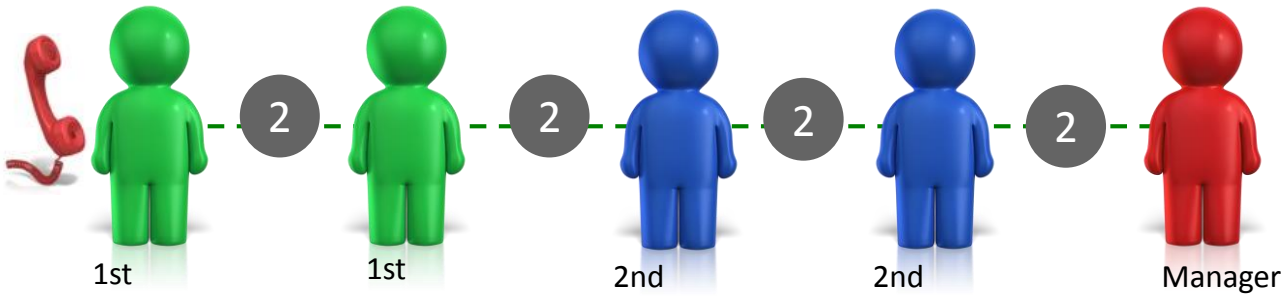
Let’s See/Hear That in Action

A Brief Demo

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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 automatically "hunts" for backup on-call engineers if the primary doesn't answer within 2 minutes.



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Notify Setup

- Plugins:
  - Notify: com.snc.notify
    - This will automatically load the Twilio Driver so no need to enable that
- Content on Community
  - Get it running in 3 simple steps: https://community.servicenow.com/community/blogs/blog/2016/08/08/get-your-notify-calling-and-texting-in-5-simple-steps
  - Get it configured with 2 simple steps: https://community.servicenow.com/community/blogs/blog/2016/09/14/notify-get-it-configured-with-2-simple-examples

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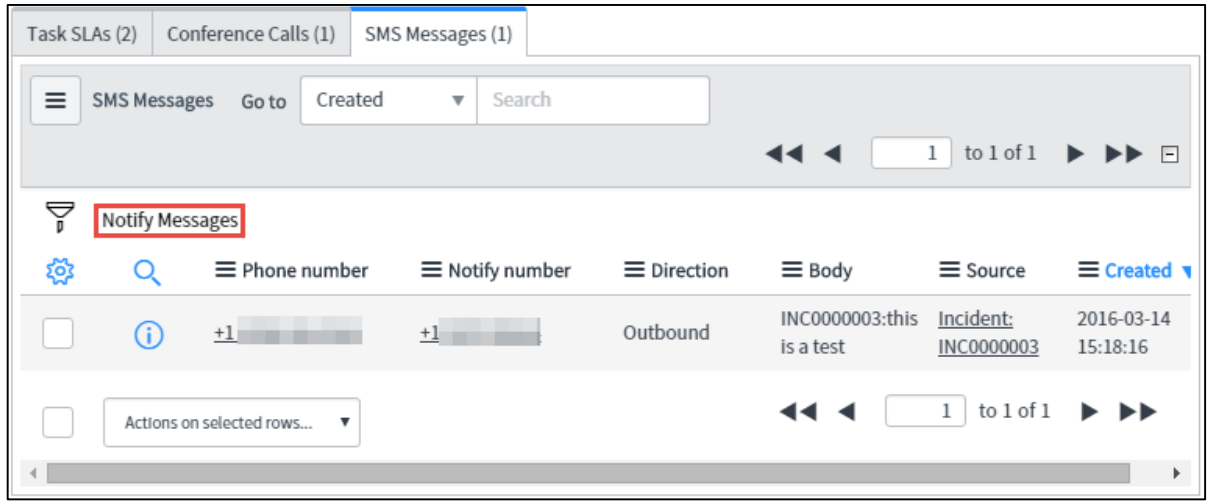
Notify Setup

- Optional Plugins:
  - Incident Alert Managment: com.snc.iam
  - CTI Softphone: com.snc.cti
  - OpenFrame: com.sn_openframe
    - Once activated:
      - Navigate to System Properties\OpenFrame
      - Open the CTI record, check the Default checkbox and Update the record.
      - Logout of your instance and login again.
- Twilio Account
  - Where to get API Credentials required by ServiceNow

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Lab 2.0 – Send SMS from Incident

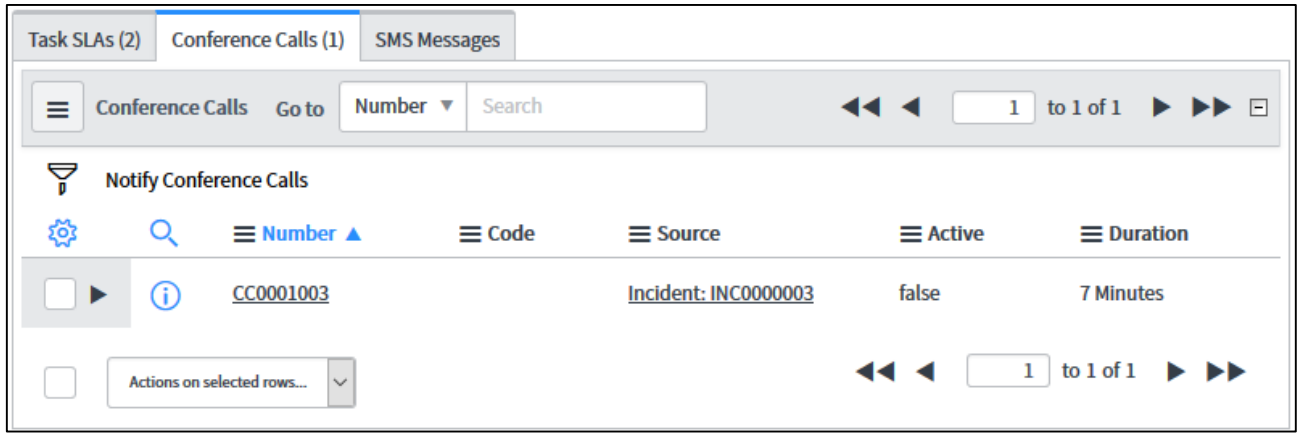
- Goal
  - Send SMS directly from any incident and track all communications from that incident
- Steps
  - Follow steps in Lab 2.0
- Report Lab Progress
  - Lab Management/Report Lab Progress



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Lab 3.0 – Start and Manage Conference Call

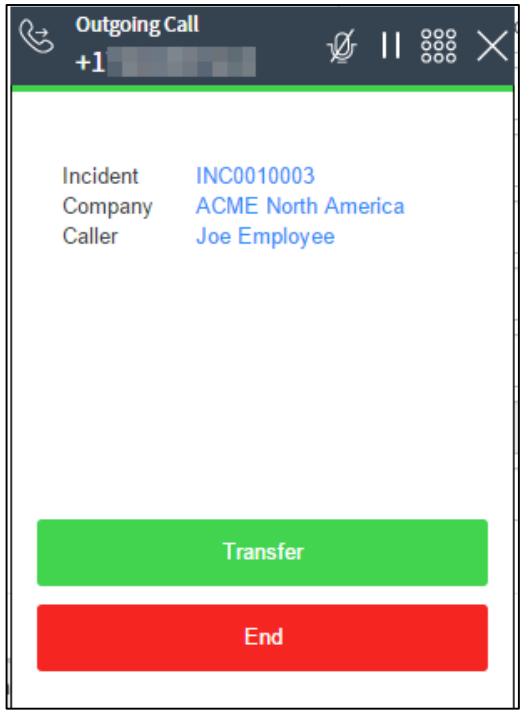
- Goal
  - Initiate a conference call directly from an incident, manage, and track the participants on the call
- Steps
  - Follow steps in Lab 3.0
- Report Lab Progress
  - Lab Management/Report Lab Progress



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Lab 4.0 – Initiate Call from Task

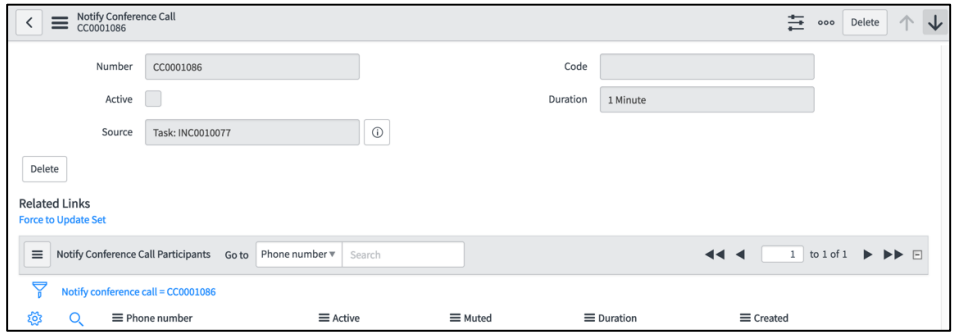
- Goal
  - Initiate a call directly through the instance to the incident caller.
- Steps
  - Follow steps in Lab 4.0
- Report Lab Progress
  - Lab Management/Report Lab Progress



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Lab 5.0 – Assignment Group Conference Call

- Goal
  - Initiate a conference call to the incident assignment group
- Steps
  - Follow steps in Lab 5.0
- Report Lab Progress
  - Lab Management/Report Lab Progress



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Notify API

- Notify Extension by Platform Development
  - Script calls through server-side scripting
  - Can be used anywhere with scripting (UI pages, Service Portal, Business Rules, etc.)
- Available actions
  - Initiate conference call
    - Mute
    - Kick
    - Forward
  - Send SMS
- Lab 5:
  - UI Macro
  - Script Include

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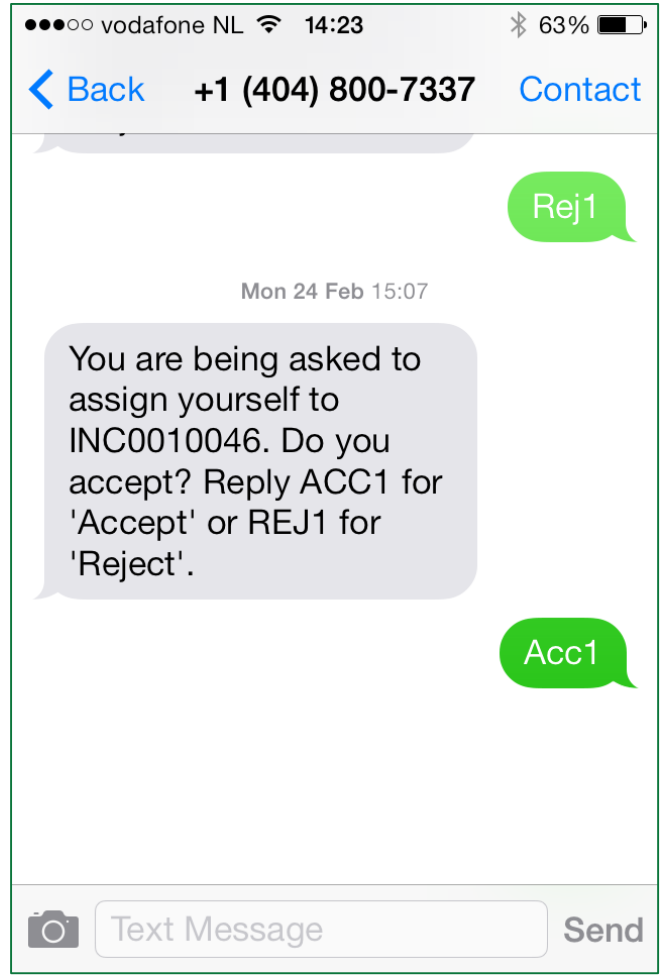
ServiceNow On-Call Scheduling

A Brief Overview

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Use Case for On-Call Scheduling

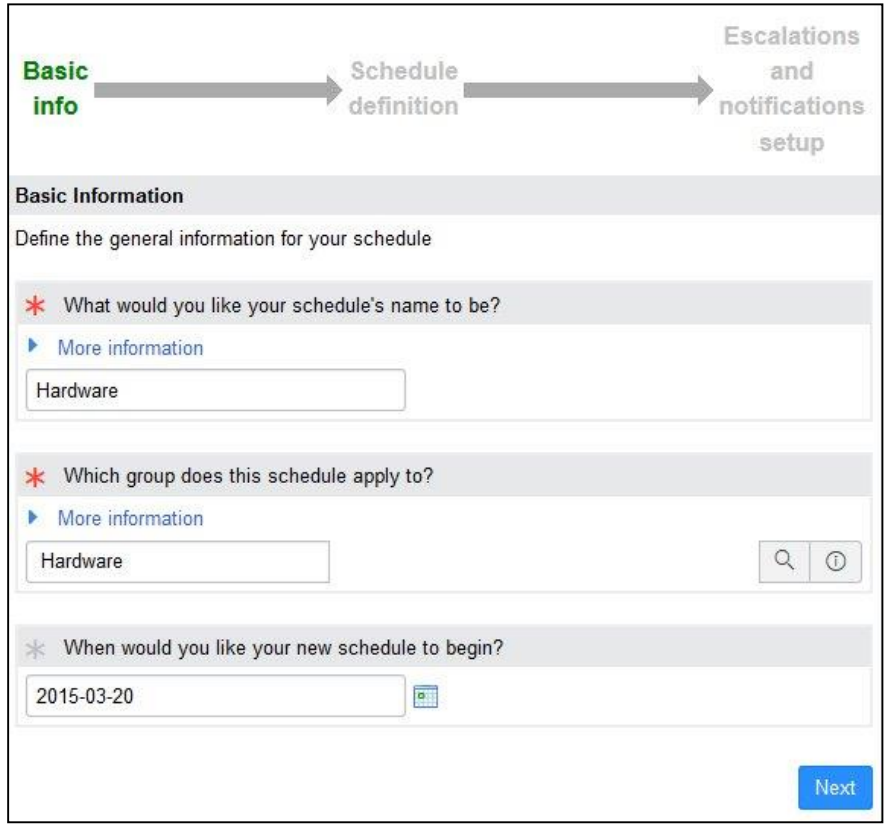
- ‘SAP Financial Accounting’ Business Service has an Outage
  - P1 Incident logged against the SAP’s CI at 14:00
  - Incident’s data will satisfy a ‘trigger’ which will do two things
    - Assign the incident to the group “SAP Services”
    - Start the workflow: Assignment by Acknowledgement
  - The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

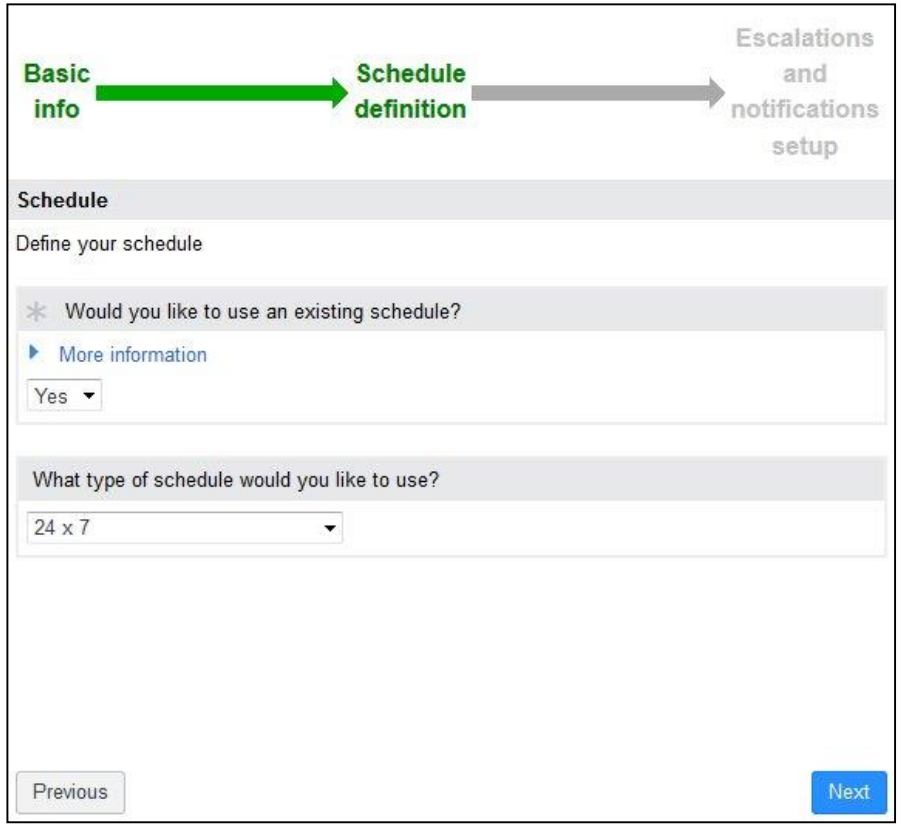


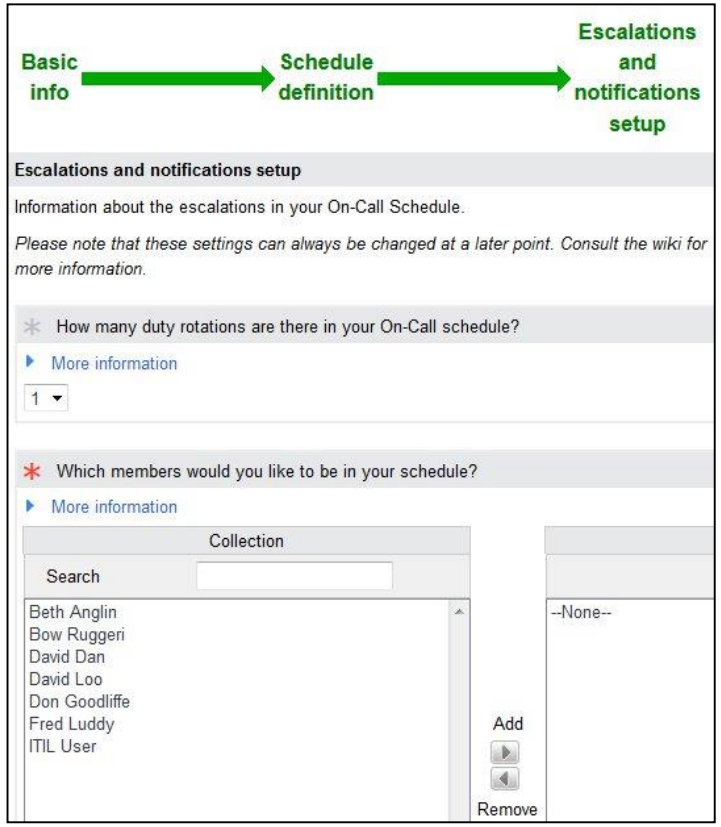
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New Schedule Creation Wizard

- Create new Schedules
- Multiple rosters
- Select members







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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

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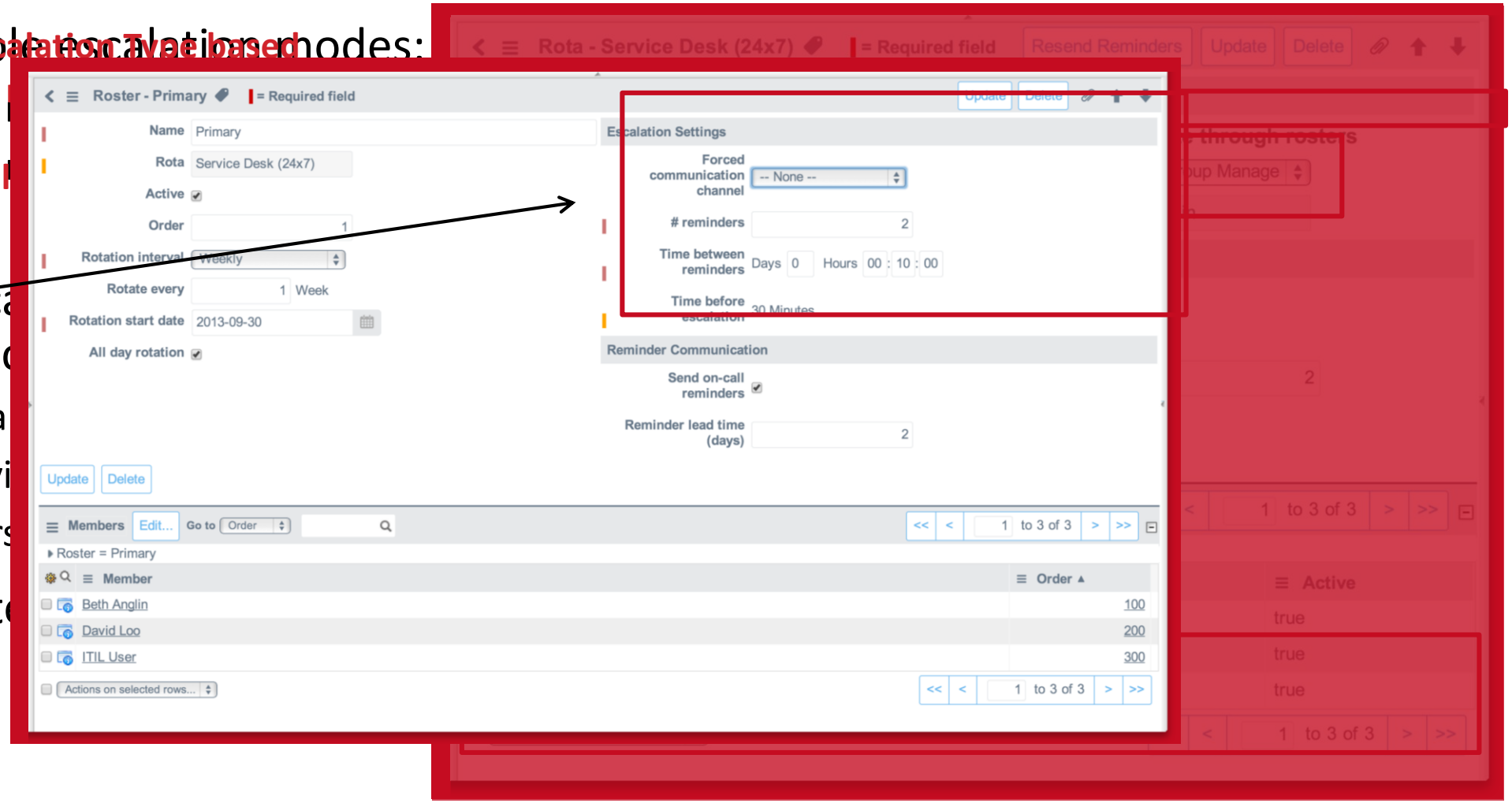
Group Rotation Escalation

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

Escalation Type based on

Catch-all

Escalation Settings per Roster

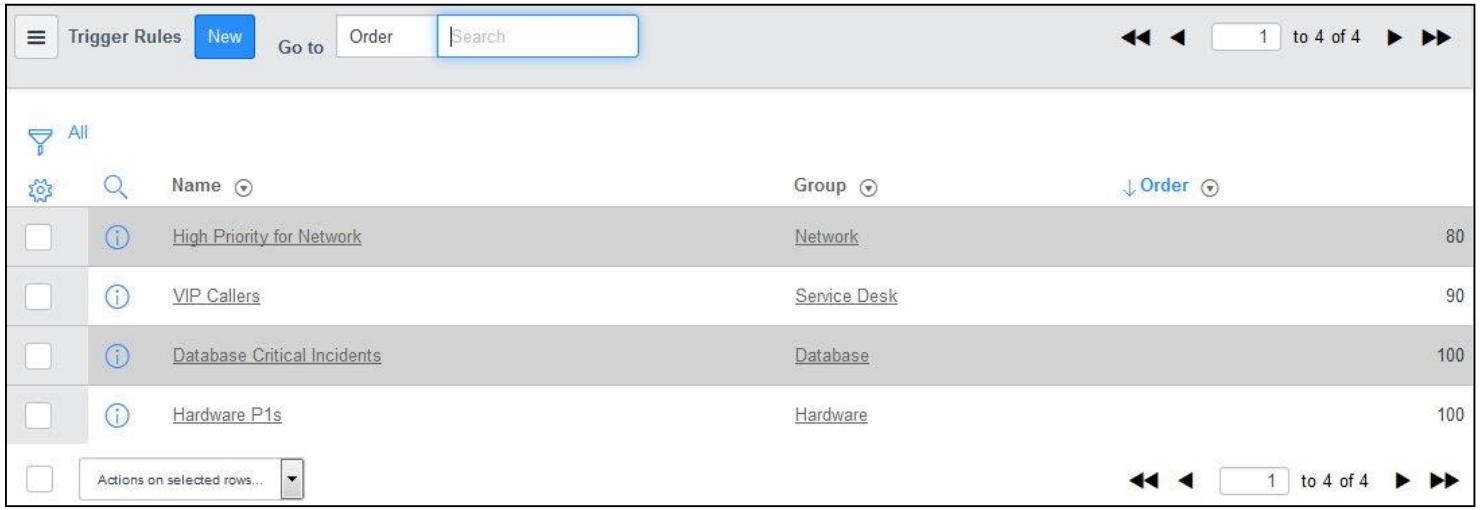


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Trigger Rules

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

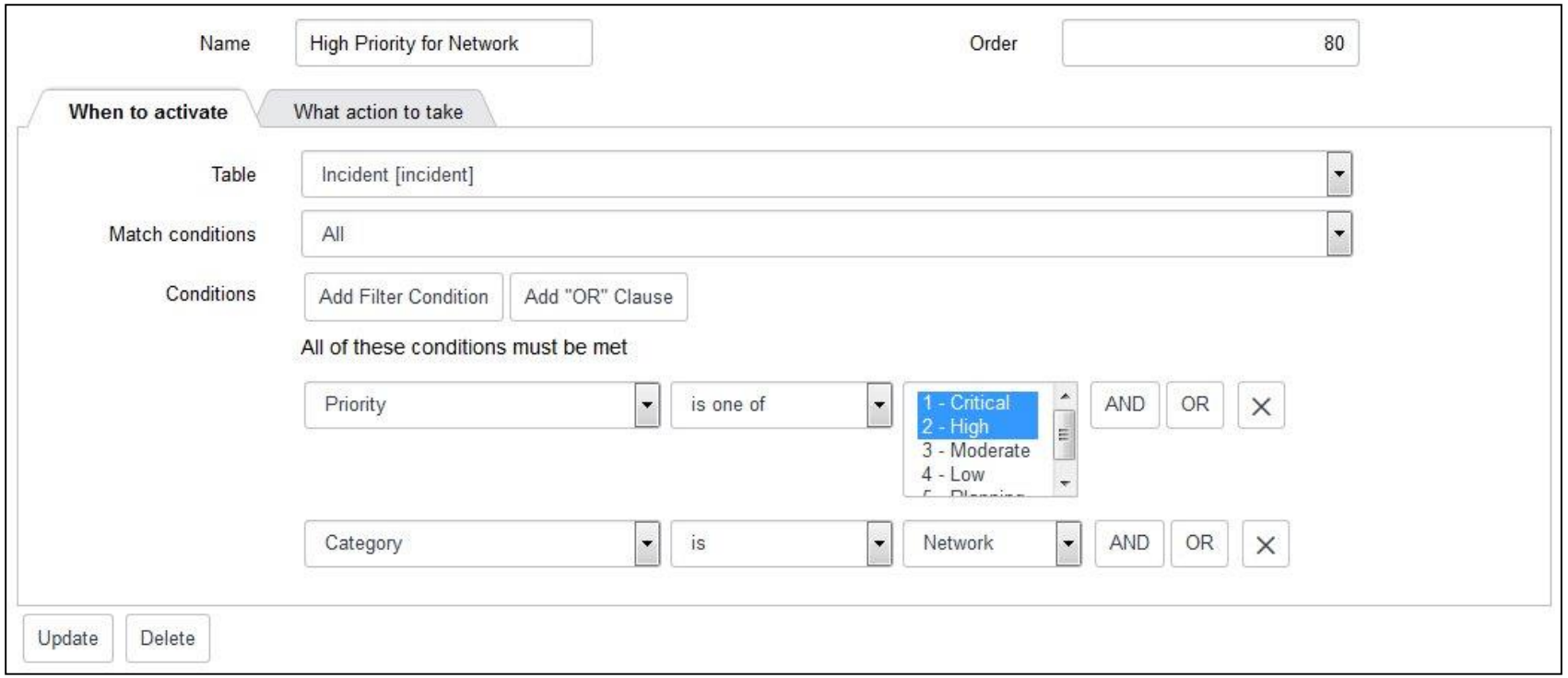
- Simple UI to generate rules that drive workflow around escalation
- Can be defined on a per-group basis
- Rules can be set to be followed in a specific order
  - Example: Decreasing granularity or specificity to ensure that there is always a default to escalate to in the event of no response



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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

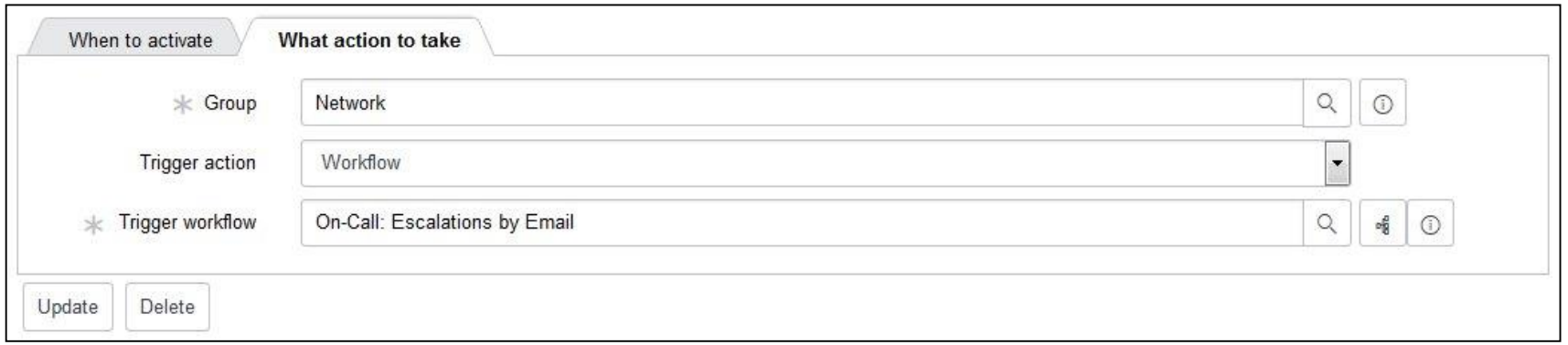


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Granular Conditions for When to Escalate

When the rule is triggered what should the system do?

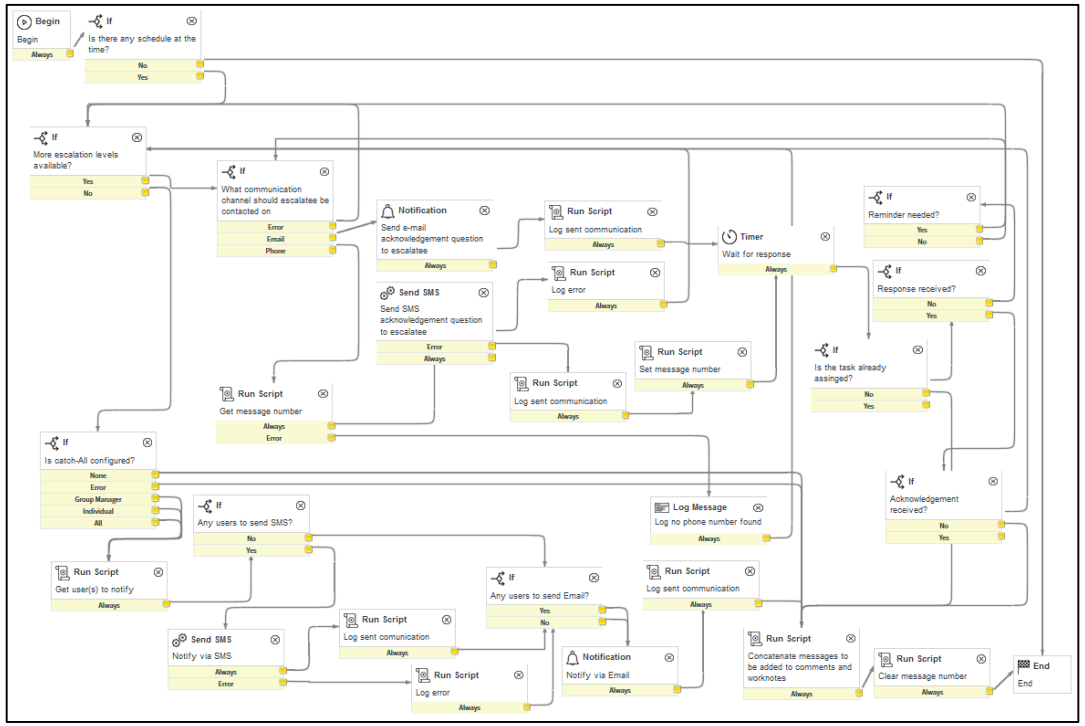
- Assign ticket to specific assignment group
- Trigger Workflow to follow more granular routing or steps
  - Assign
  - Assign and Notify *
  - Assign by Acknowledgment *
  - Escalations by Email
- Can also trigger a script to drive more complex routing or logic conditions
  - Example: If trigger is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



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Workflow

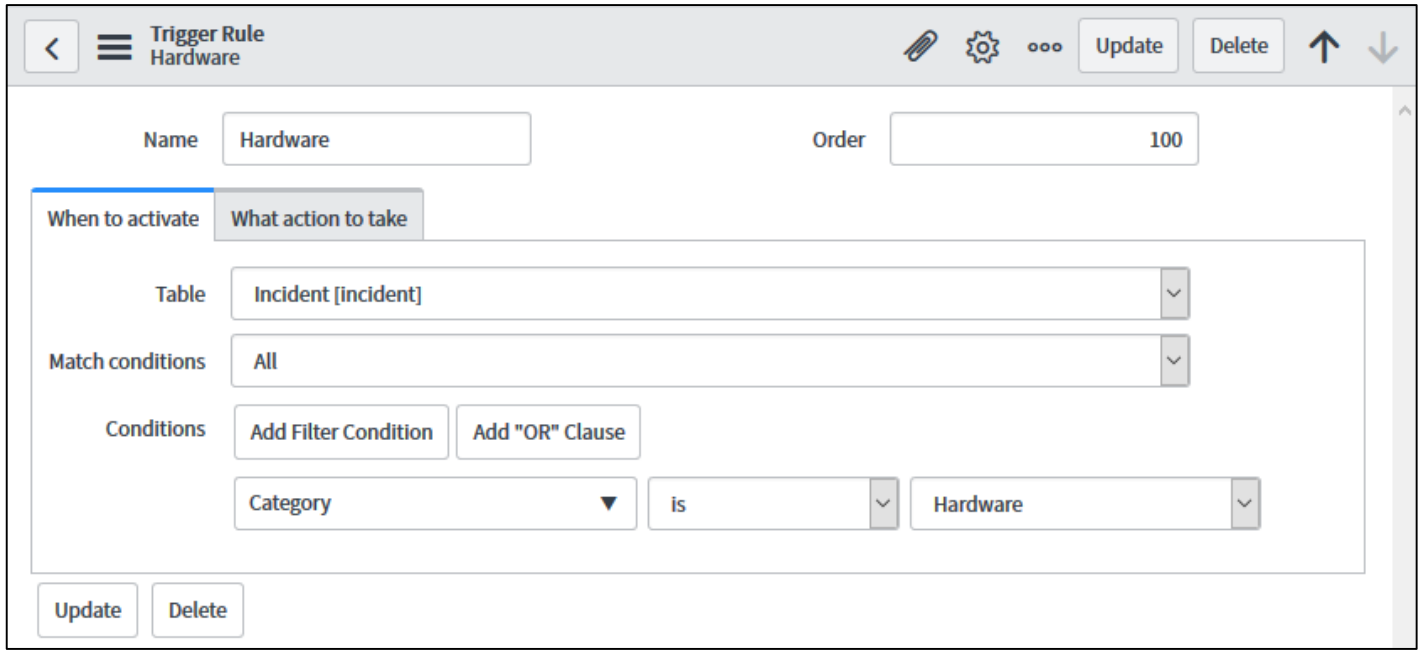
- Use workflow to build and define process for managing escalation and assignments
- Include notification and escalation triggers
- Provides the ability to include email and SMS options into the workflow for notification
- Logic to drive next steps of workflow and escalation, based on response from SMS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



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Lab 6.0 – Create On-Call Rota and Trigger Rule

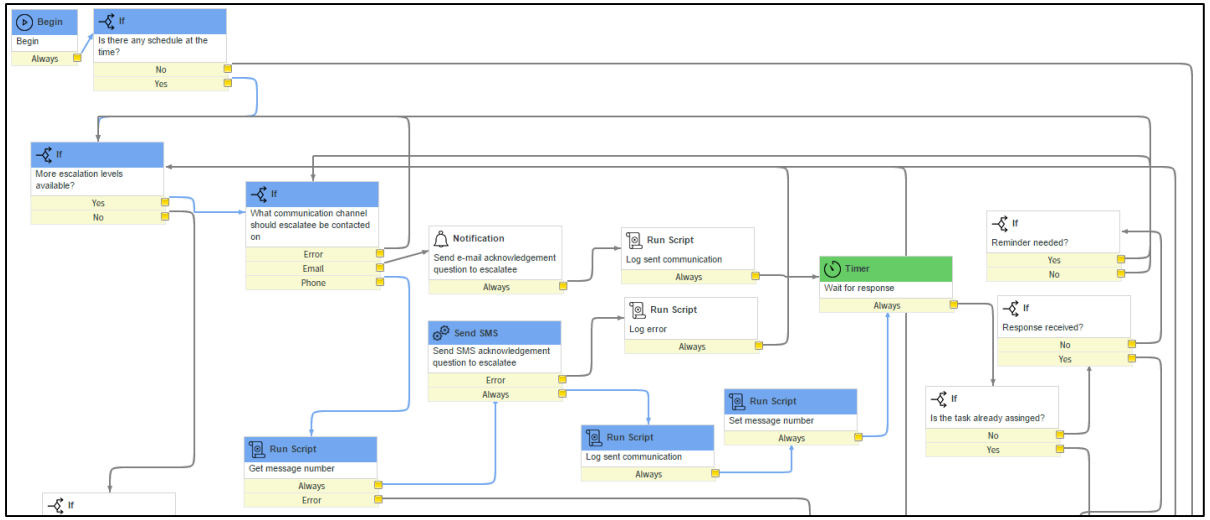
- Goal
  - Create a new On-Call Rotation for the Hardware team
- Steps
  - Listed in Lab 6.0
- Report Lab Progress
  - Lab Management/Report Lab Progress

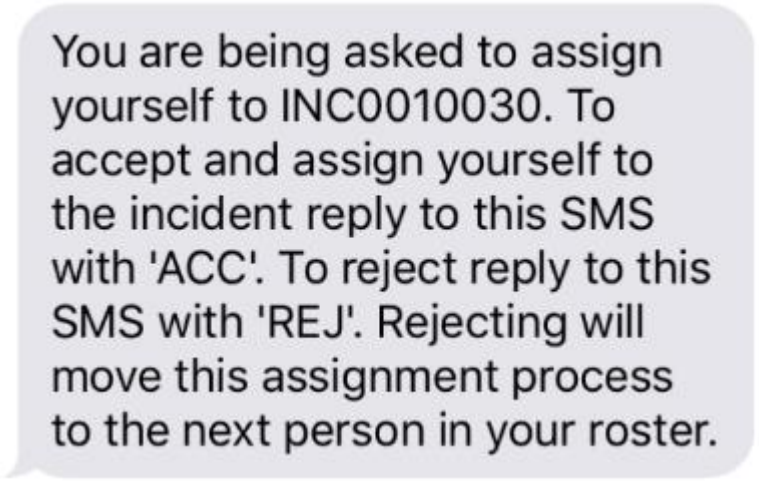


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Lab 6.1 – Test Hardware Rota

- Goal
  - Create an incident to test the new Hardware Rota created in Lab 6.0
- Steps
  - Listed in Lab 6.1
- Report Lab Progress
  - Lab Management/Report Lab Progress

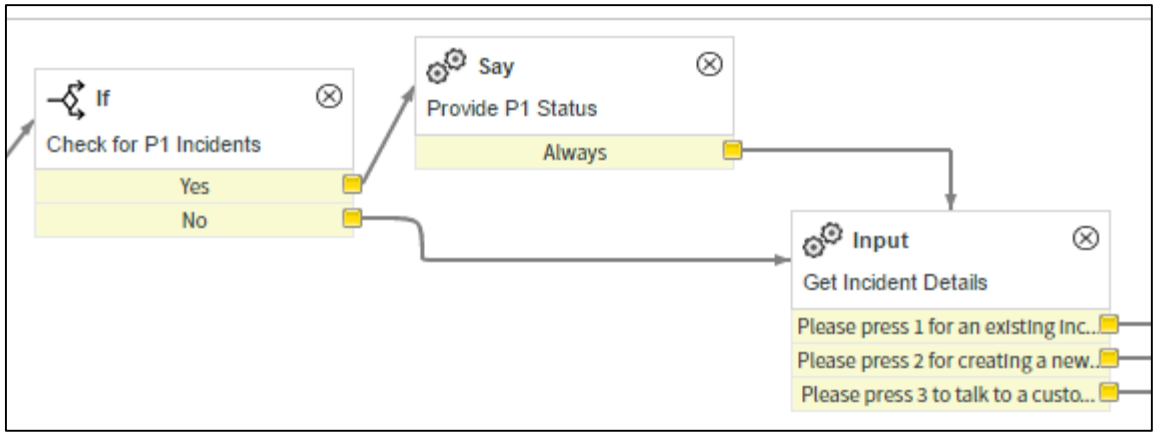


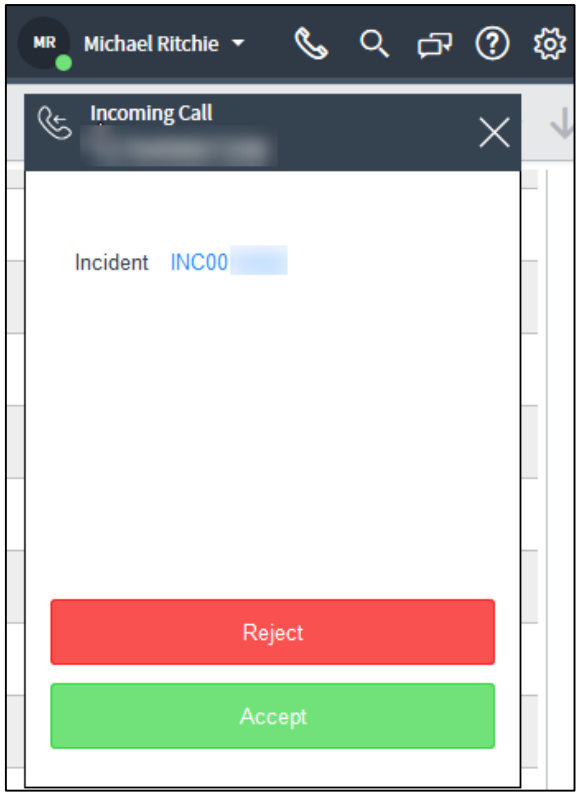


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Lab 7.0 – Call Center for Incident Management

- Goal
  - Learn how to use the out of the box workflow to receive a call and then edit it to provide Priority 1 incident status
- Steps
  - Listed in Lab 7.0
- Report Lab Progress
  - Lab Management/Report Lab Progress





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Advanced Notify Use Cases

A Brief Overview

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Advanced Notify Use Cases

- 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
- 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

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Customer Use Case

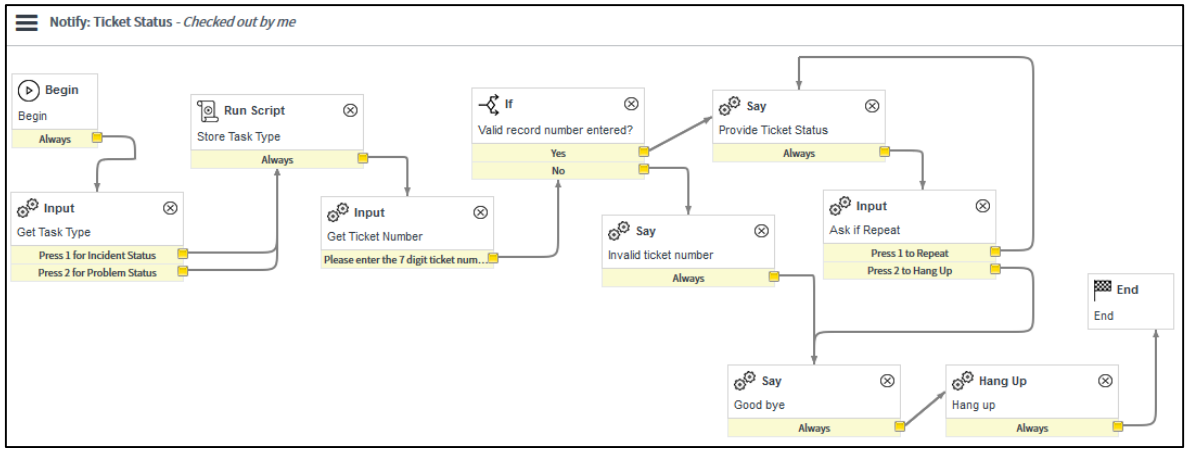
- Challenges
  - Numerous monitoring tools with limited or no integration
  - No comprehensive operations risk view
- Business Drivers
  - Improve Mean Time to Repair and improve performance SLAs
  - Lower TCO
- Solution
  - ServiceNow Event Management, Knowledge Management, Incident Management, On-Call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



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Lab 8.0 – Ticket Status via Voice

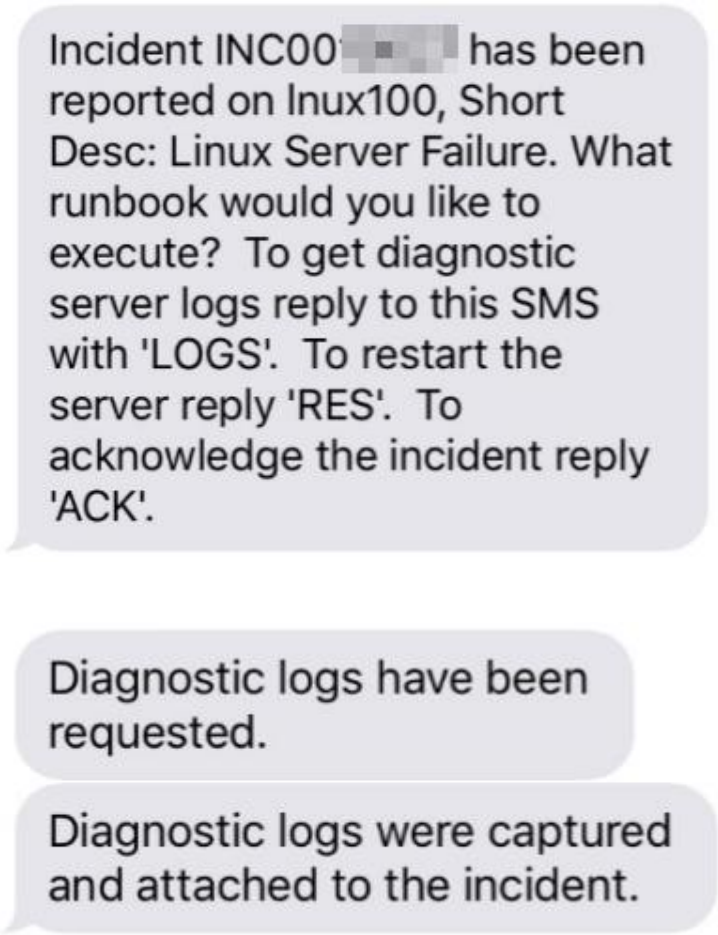
- Goal
  - Setup a workflow allowing users to call for incident and problem ticket status
- Steps
  - Listed in Lab 8.0
- Report Lab Progress
  - Lab Management/Report Lab Progress



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Lab 9.0 – Orchestration with Notify

- Goal
  - Create workflow allowing incident assignee to take action on an incident via SMS
- Steps
  - Listed in Lab 9.0
- Report Lab Progress
  - Lab Management/Report Lab Progress



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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.

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Thank You

Lab Sponsored by Microsoft Azure



Michael Ritchie
Sr. Platform Architect
Servicenow

Michael Slabodnick
Sr. Solution Consultant
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