ATLASSIAN University

Atlassian Incident Management Essentials

Lab Workbook

ATLASSIAN University

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Introduction

Lab format

Optional exercises and appendices

The labs may have optional exercises. These are not required to complete the course. However, if you have time and interest, they supplement the exercises for the lab. There may also be appendices that you don't need to complete the class. They are full of useful information like additional reading and best practices. Dig into these after you complete the course!

Language and User Interface

The language you see in the Atlassian product UI is set to your browser's language. If you wish to see the UI in English (to match the lab instructions), or in a different language, go to your Atlassian user profile and edit your account preferences.

Cloud products are constantly being updated with new features, so you may see some slight differences between the lab instructions and the product you are using.

Logging in to your lab environment

To log in during the labs, you need your assigned site URL and each user's email address and password. If you're taking an On Demand course, you'll find these in the **Virtual Lab Instructions** activity in the **Lessons** section. If you're taking an instructor-led course, your instructor will share these details with you.

ⓘ The password for every user is the same. Keep this password easily accessible.

⚠ When switching between products in these labs, you can see other sites. It's important that you choose the product on the site that's been assigned to you.

You'll log in as different users throughout the course. Here's a list of the users and what role they'll have.

Name	Role
Di	Site administrator Jira administrator Service project administrator

Name	Role
Su	Service agent
Mo	Subject matter expert

Lab 1 - Accessing your lab site

Logging into your lab

To log in during the labs, you need an assigned **site URL** and each user's **email address** and **password**. If you're taking this as an OnDemand course, you'll find this in the **"Virtual Lab Instructions"** activity. If you're taking an instructor-led course, you'll receive the details from your instructor.

The **password** for **every user** is the **same**.

Do not log in with your own Atlassian ID

You probably already have an Atlassian account that you use to log in to your own Atlassian products. In the labs for this course, a specific set of users has been added to the cloud site. You will log in with these accounts. Do not log in using your own Atlassian ID.

Log in using a new browser, or an Incognito or Private window

A single browser can only handle one Atlassian account. This is because browsers keep cookies. Once you're logged into a cloud site on one browser, it remembers that login. So, if you open a new tab, you can't login as someone else.

To log into your lab, use a different browser to the one you usually use, or use an incognito or private window to log in.

Logging into labs as different Users

In the labs you'll need to log in as one or more users. To avoid logging in and out a lot you can either use different browsers or use an incognito or private window for each user.

Opening an Incognito window

> ⓘ You can open either an incognito window (Chrome) or private window (Firefox) from the browser menu. Other browsers also have the same functionality.

Chrome

1. Either:
    a. Click the Chrome three-dot (ellipses) menu button or
    b. From the Chrome browser menu click File.
2. In the dropdown menu, click New Incognito Window

Firefox

1. Either:
    a. Click the three-line Firefox application menu or
    b. From the Firefox browser menu click File.
2. In the dropdown menu, click New Private Window

Accessing your site

1. Use your assigned **site URL to navigate to your site.**

You’re all set!
When you get to Jira/Confluence, you'll be told who to log in as.

Lab 2 - Create an ITSM project

Estimated time: 15 minutes

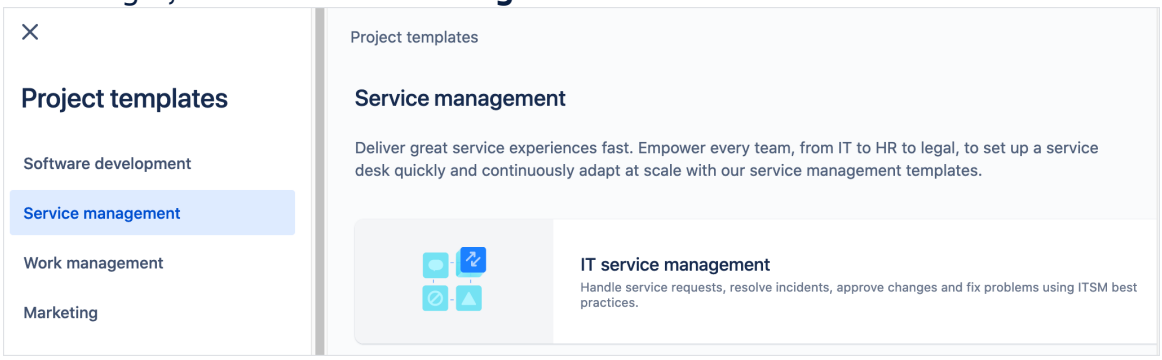
In this lab, you will:

1. Create an ITSM service project
2. Create an incident

Exercise 1 - Create an ITSM service project

ⓘ Here you log in as the Jira administrator and create a new IT service management project that you'll use throughout the labs.

1. Log in to your site as the Jira administrator, **Di**, using the provided email address and password.
    - **Note: You are not using your personal information to log in.**
2. If you see onboarding screens such as 'Welcome', 'Invite your team' or 'Select the tools' pages, click **Skip question** or **Skip**. You should eventually see the **Projects** page (or possibly the **Your work** page).
3. In the top menu, click the **Projects** dropdown and select **Create project**.
    - **Note**: Only Jira administrators can create Company-managed projects.
4. If you see the **Project templates** screen, follow these instructions (if you see the **Create project** screen, skip to step 5):
    a. In the sidebar, select **Service management**.
    b. On the right, select **IT service management**.



    c. Read the information on this template if you wish.
    d. Click **Use template**.
    e. For Name, enter **ITSM Help**.
    f. Leave the key as is.
        - **Note**: The Key is automatically created. This is used as the prefix of your project's issues.
    g. Leave **Share settings with an existing project** unchecked.
    h. For Team type, select **Information Technology (IT)**.
    i. Click **Create project**.
    j. Skip to step 6.
5. If you see the **Create project** screen:
    a. For Name, enter **ITSM Help**.
    b. Leave the key as is.
        - **Note**: The Key is automatically created. This is used as the prefix of your project's issues.

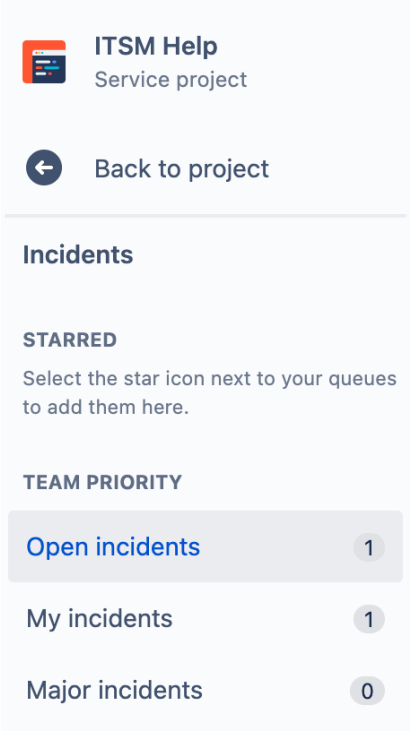
   c. Leave **Share settings with an existing project** unchecked.
   d. Click **Change template**:
      i. Near the top of the page click the dropdown and select **Service project**.
      ii. Select the **IT service management** template.
   e. Back on the Create project page, click **Create**.
6. If you're prompted to take a tour of an ITSM project and you want to, click **Take the tour**. If you don't want to take the tour, click **Explore by myself**.
7. Here you see the All open tickets or Open incidents queue. You don't have any tickets yet so nothing shows here.

Congratulations, you created an ITSM service project!

Exercise 2 - Create an incident

ⓘ Customers create incidents and other requests on the customer portal. You could create a request from the project but let's experience what a customer sees.

1. Go to the customer portal:
    a. In the ITSM Help project sidebar, scroll down and click **Channels**.
    b. Mouse over **PORTAL** and click **Open**. A new browser tab opens displaying your customer portal for this project.
    c. Click **Help Center** at the top. Here you see all the customer portals you have on your site - one for each service project.
    d. Select **ITSM Help** to return to your customer portal for this project.
2. Create an incident:
    a. Select **Common Requests**, then **Report a system problem**.
    b. On the request form, for 'Summarize the problem', enter **I can't save my address**.
    c. For 'Describe what happened and how it occurred', enter some text, for example, **The Save button is greyed out**.
    d. Scroll down and for 'How urgently does this need to be fixed?', select **Medium**.
    e. For 'How big of an impact...', select **Moderate / Limited**.
    f. Click **Send** and you see your incident.
3. View incident queues:
    a. Return to your project tab and you should see your incident in the queue.
        i. If you don't see your new incident, refresh the page.
    b. If you're not already on the **Open incidents** queue:
        i. In the project sidebar, click **Back to project** (if necessary) then click **Incidents**. If you don't see the **Incidents** link, refresh the page.
        ii. Click **Open incidents** to open that queue.
    c. In the sidebar, you see a number of queues specifically for incidents.
    d. If you're presented with a tour, you can take the tour or click **Explore for myself** to dismiss it.
4. Assign the new incident to yourself:
    a. Click the incident's key or summary to view the details.
    b. Click in the **Assignee** field and assign it to yourself, **Di**.
        i. You may see a message about alerts and responders. We'll cover that soon.
    c. Look at the sidebar. The **Open incidents** queue should now have the number **1** next to it.
        i. If you still see 0, refresh the page.



5. Resolve the incident:
   Note: This is a minor incident that an agent can resolve so it doesn't need to be escalated to a major incident. We'll look at major incidents in later labs.
   a. Above the issue details on the right, click the **Open** dropdown (the status of the incident) and select **Resolve**.
   b. On the Resolve dialog, for Resolution, select **Done**.
   c. Optionally, enter a comment to respond to the customer, for example, **This is a known issue and will be fixed soon. To save your address, enter a phone number.**
   d. Click **Resolve**.
   e. Verify that the Open incidents and My incidents queues are empty and that the Resolved incidents queue has one entry.
      i. If you don't see this, refresh the page.

Congratulations, you created an incident! You have completed this lab.

Lab 3 - Set up your teams

Estimated time: 30 minutes

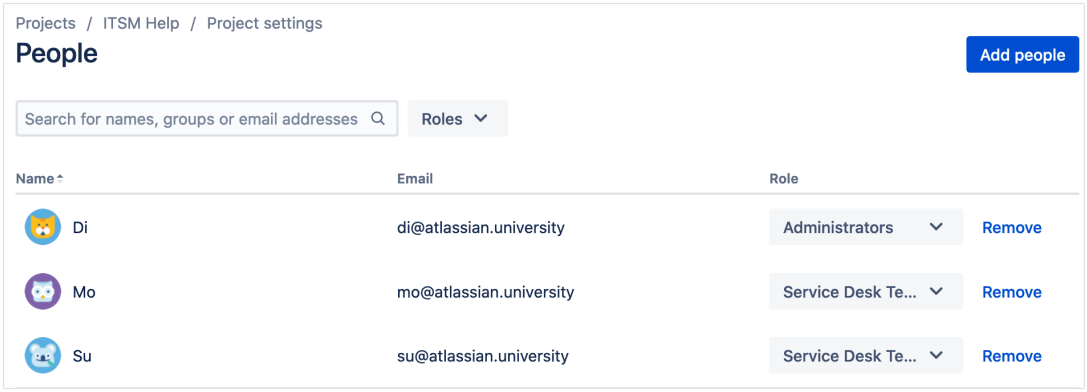
In this lab, you will:

1. Set up an incident response team
2. Set up a service owner team
3. Set up your profile notifications
4. Test your notifications

Exercise 1 - Set up an incident response team

ⓘ Here you set up your team who'll respond to incidents in your new ITSM project.

1. View one way to invite people to your team:
    a. Continue logged in as **Di** in the **ITSM Help** project.
    b. If you see the incident queues in the sidebar, click **Back to project**.
    c. In the project sidebar, scroll down and click **Invite team**.
        - **Note**: Here you can enter the email address of agents to send them an email to invite them to the project. Any users you invite this way will automatically have the role of Service Desk Team. This is one way to add agents. In this lab, we'll use another method.
    d. Click **Cancel** to close the dialog.
2. Add your team from the People page:
    a. At the bottom of the project sidebar, click **Project settings**.
    b. In the Project settings sidebar, click **People**.
        - **Note**: Here you add team members to your project and choose which role they'll have in the project. You can see that the creator of the project is automatically added as a member of the project with the role of Administrators. This means they are a project administrator for this project and can access and configure project settings. You can assign this role to other users to delegate project administration.
    c. Click **Add people**.
        i. For name, enter and select **Su**, then enter and select **Mo**.
            - **Note**: Su and Mo are already members of the site so you can just enter their names. You can also enter email addresses here for users who aren't already members of the site. They'll get an email with a link to join the site.
        ii. Click the Role dropdown and select **Service Desk Team**.
            - **Note**: In this case study, Su is an agent in the project and will work on minor incidents. Mo is a member of the incident response team and will work on major incidents.
        iii. Click **Add**.
        iv. Now you should see three entries - Di as the project administrator and Mo and Su as members of the service desk team.

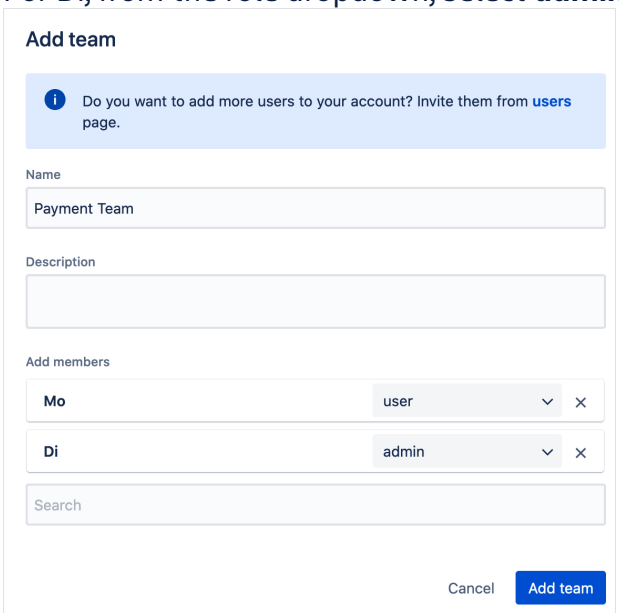


Congratulations, you added your service desk team to your project!

Exercise 2 - Set up a service owner team

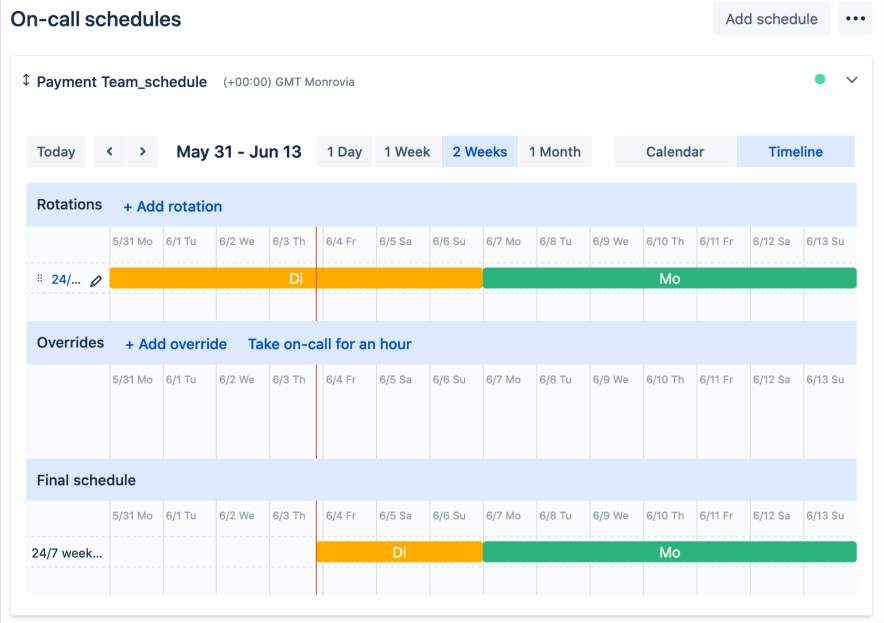
ⓘ Here you set up your service owner team who will respond to major incidents on the service they own.

1. Navigate to Opsgenie:
    a. In the sidebar, click **Back to project**.
    b. In the project sidebar, click **On-call**.
    c. You don't have any on-call schedules yet as you haven't created a response team. Click **add a new team**.
        i. This takes you to Opsgenie, which is integrated into Jira Service Management. If you are prompted to log in again, log in as **Di**.
        ii. Opsgenie will open in a new browser tab. Keep the original project tab open as you'll be switching between the project and Opsgenie.
2. Create a team:
    a. On the Teams page, click **Add Team**.
    b. For Name, enter **Payment Team**
    c. Click in the **Add members** field.
        i. Enter and select **Mo**.
        ii. Leave their team role as **user**.
        iii. Add yourself by entering and selecting **Di**.
        iv. For Di, from the role dropdown, select **admin**.



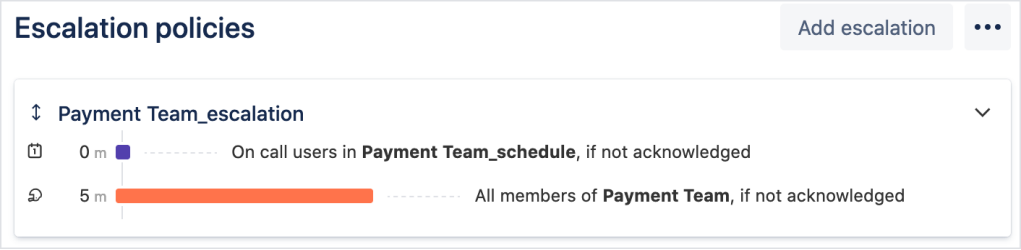
    d. Click **Add team** and you're taken to the team's On-call page.
3. Set up an on-call schedule:

a. On the On-call page, scroll down to **On-call schedules** and note who's currently on call.
    i. **Note**: This is the default 24/7 on-call schedule set up for your team. It's a 1-week rotation for each team member.
    You can click the display options at the top to view it as a calendar or change the amount of time displayed to view it as 1 day, 1 week, 2 weeks, or 1 month.
b. For the default rotation, **Rot1**, click the edit icon (pencil) next to the name and select **Edit Rotation**.
c. Change the name to **24/7 weekly**.
d. For Participants, if Di is not currently on-call, click and drag the **Di** box so she is the first Participant. This will make her currently on call. Check the calendar below.
e. Click the Rotation type dropdown to view the options but leave it as **weekly**.
f. Click **Update**.
g. You should now see Di as currently on call in the weekly rotation.



4. Update the default escalation policy:
    a. On the On-call page, scroll up to **Escalation policies**.
    b. If the team's escalation policy is minimized, click the **>** symbol to expand it.
        - **Note**: This is the default escalation policy set up for your team.
            - If a new alert is not acknowledged immediately, it will notify the on-call user in the schedule.
            - Five minutes later if there is no acknowledgment, it will notify the next user in the on-call rotation.
            - Ten minutes after alert creation, if there is still no acknowledgment, it will notify all members of the team.

c. Mouse over the policy and click the **Edit** (pencil) icon. We'll change it so 5 minutes after no acknowledgment, it will notify all members of the team, and delete the last rule.
    i. Mouse over the third escalation rule (after 10 minutes) and click the **Delete** icon.
    ii. Mouse over the second escalation rule (after 5 minutes) and click the **Edit** icon.
        1. Click the dropdown that is currently set to Notify next user (in rotation) and select **Notify all members of team** then search for and select **Payment Team**.
        2. Click **Save**.
d. Click **Update**. You just have two escalation rules in your escalation policy now.



5. On the On-call page, scroll up to **Routing rules**.
    - **Note**: If you've set up multiple escalation policies, you can select which one is in effect here. In this case, we just have one, the default escalation policy, and that's the one in use.
6. View your new on-call schedule in Jira Service Management:
    a. Return to your **Jira Service Management** project tab.
    b. Refresh the **On-call** page and view your new schedule.
        i. If you're not on the On-call page, in the project sidebar, click **On-call**.
            - **Note**: The schedule is synced between Jira Service Management and Opsgenie. You can return to Opsgenie from here by clicking any of the Opsgenie links.

Congratulations, you set up a response team!

Exercise 3 - Set up your profile notifications

ⓘ Since you (Di) are part of the incident response team, you set up your profile so you're notified of major incidents.

1. Add your contact details:
   Note: Here you update how Di can be contacted. By default, her email is already entered. You add phone numbers for SMS (text) and voice calls.
   a. Return to the **Opsgenie** tab.
   b. In the top menu, click **Settings**.
      i. If you closed the Opsgenie tab, from the On-call project page, click **View in Opsgenie** then click **Settings**.
   c. In the sidebar, under MY PROFILE, click **Notifications**.
   d. In Contact methods, under SMS, click **Add phone number**
      i. If you want to test your setup later in the lab and receive the SMS notification on your phone, enter your own phone number. Otherwise, enter **4155550101**.
      ii. Click **Proceed**.
      iii. If you're prompted to verify your phone number:
         1. If you used your own phone, enter the code that's sent to your phone.
         2. If you used the phone number above, click **Cancel**. This phone number is unverified.
   e. Under Voice, repeat the steps above to add a phone number.
2. Set notification rules:
   Note: Here you set rules for how Di is to be notified. By default, Di will be notified immediately by email, SMS text, and voice when a new alert is created. For this example, you pause email notifications and set it up to send a text immediately a new alert is created and a voice call 5 minutes after a new alert is created.
   a. On the Notification page, scroll down to **Notification rules**.
   b. To the right of the email notification, click the **Disable icon** (two parallel bars). The lab email accounts are not set up to receive emails.
      - **Note**: Instead of deleting a rule or notification step, disabling can be useful if you just want to temporarily disable it. You may want to do this, for example, when you go on vacation.
   c. To the right of the voice notification, click the **Edit icon** (pencil).
      i. Change the time to **5** minutes after.
      ii. Click **Save**.
         - Now you'll be notified by text as soon as a new alert is created and five minutes later by voice if you haven't acknowledged the text alert.
         - **Note**: If the phone number is unverified, the rule will be greyed out until it's verified.

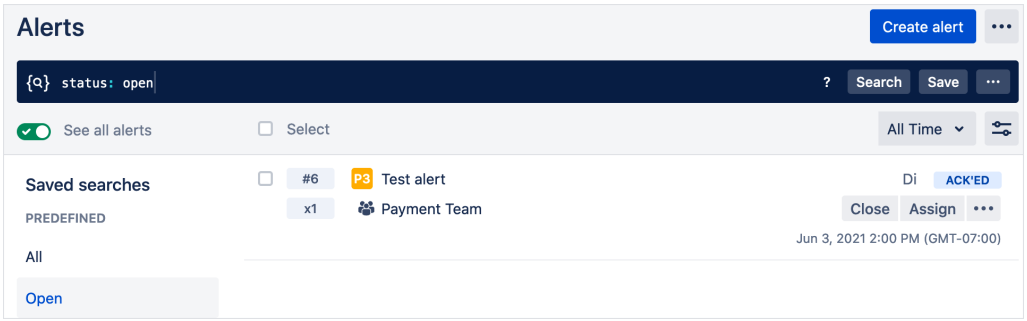
   d. Optionally, explore the other default notification rules. For example, expand the **Schedule Start** rule by clicking the **>** sign to the right. This default rule notifies you by email just before your on-call rotation starts.
3. View other notification settings:
   a. Scroll to the **Others** section at the bottom of the page.
      - **Note**: Here you can mute all notifications, enable quiet hours when you don't want to be disturbed, and set preferences for news and announcements.

Congratulations, you set up your profile notifications!

Exercise 4 - Test your notifications

> ⓘ To test your notifications, you manually create an alert. You only see the text or get a voice call if you set up your own phone number in your notification settings and you put yourself first in the on-call schedule in the earlier exercise.

1. Create an alert:
    a. In the Opsgenie top menu, click **Alerts**.
    b. Click **Create alert**.
    c. For Alert message, enter **Test alert**.
    d. For Priority, leave it at **P3-Moderate**.
    e. For Responders, enter and select **Payment Team**.
    f. Click **Create**.
2. Acknowledge the alert:
    a. If you set up your own phone number for alerts and put yourself first in the on-call schedule, you should receive a text immediately. You can acknowledge this on your phone or in your computer's browser.
    b. To acknowledge the alert on your phone:
        i. Click on the URL in the text.
        ii. Login in as **Di**.
        iii. On the top right of the Test alert screen, click **Ack**.
        iv. Back on your computer's browser, refresh the page.
        v. You see the alert has been acknowledged (ACK'ED).
    c. Alternatively, you can acknowledge the alert in your computer's browser by clicking **Ack** in the alert.



Congratulations, you tested your notifications! You have completed this lab.

Lab 4 - Set up your services & integrations

Estimated time: 20 minutes

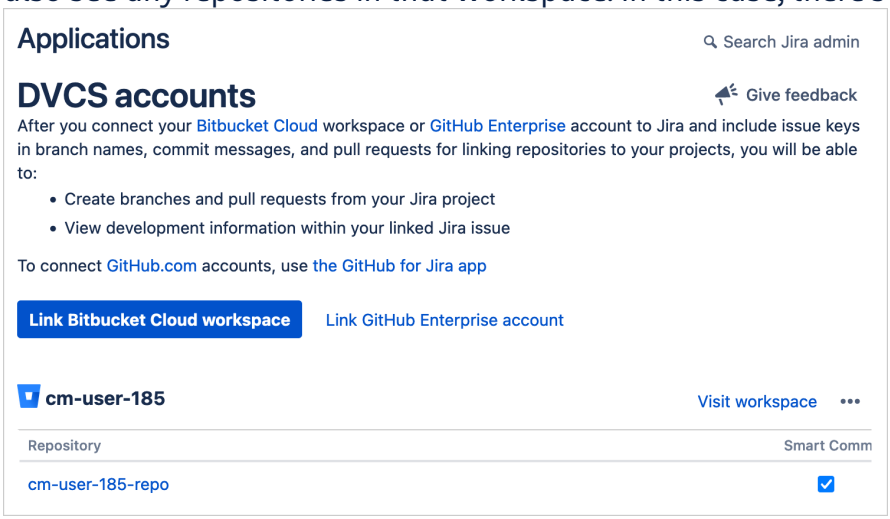
In this lab, you will:

1. Set up a service and connect it to a Bitbucket repository
2. Optionally, view integrations

Exercise 1 - Set up a service and connect it to a Bitbucket repository

ⓘ Here you view the integration that's already been set up between Jira and the Bitbucket workspace and see the repository available in that workspace. Then you create a service and connect it to the Bitbucket repository. This is where the service is deployed.

1. View the Bitbucket integration:
    a. As **Di**, in the **Jira** top menu, click the **Settings** (cog) icon and select **Products**.
    b. In the sidebar, under INTEGRATIONS, click **DVCS accounts**.
    c. Here you see Jira is already connected to a Bitbucket workspace. The name of the workspace should match the first part of the domain name of your site URL. You also see any repositories in that workspace. In this case, there's just one.



2. Create a service:
    a. Return to the **ITSM Help** project.
    b. In the project sidebar, click **Services**.
    c. Click **Add a service**.
        i. For Name, enter **Payment service**.
        ii. For Tier, select **Tier 1**.
        iii. For Service Owners, select the incident response team you created earlier, **Payment Team**.
        iv. For Repository, select the repository that starts with the first part of the domain name of your site URL and ends in repo, for example, cm-user-185-repo. You should have seen this on the DVCS accounts page earlier.
        v. Click **Create** and you now see your service.

- **Note**: You see your team, **Payment Team**, under Service Owners. Clicking the team takes you to that team in Opsgenie. You also see your Bitbucket repository listed. Clicking the repository will take you to Bitbucket. Don't click on either of them now.

d. Click **Add relationship** then click the **Depends on** dropdown.
   - **Note**: You can set up relationships with other services - either this service depends on another service, or this service is used by another service.
e. Click **Cancel** to cancel out of adding a relationship.
f. Click **Back** to return to the Services page where you see the new service listed.

Congratulations, you set up a service and connected it to a repository.

(Optional) Exercise 2 - View integrations

ⓘ Here you view the Statuspage app which integrates Statuspage with Jira Service Management. Then you view how to integrate Slack in both Jira administration and in the ITSM project.

1. View the Statuspage app:
    a. In the top menu, click **Apps** and select **Explore more apps**.
        i. If you don't see Apps in the top menu, click **More,** then select **Apps**, **Explore more apps**.
    b. Check **Free for all teams** and search for **statuspage**.
    c. Click to open the **One Statuspage** app.
        - Don't install the app as Statuspage is not set up on your site. You need Statuspage installed first.
        - Optionally, read the information about the app.
        - **Note**: Once this app is installed, you can see Statuspage messages in your Help Center.
2. View how to integrate Slack:
    a. First, go to Jira administration to connect your Slack workspace to Jira. From the top menu, click the **Settings** (cog) icon and select **Products**.
    b. In the sidebar, under JIRA SERVICE MANAGEMENT, click **Incident Management**. Here you connect your Slack workspace.
    c. Now return to the **ITSM Help** project, where you select the Slack workspace to use.
    d. Go to the project settings **Incident management** page, where you can manage many of your incident management features.
    e. Scroll down to the **Communication preferences** section. Here you select the Slack workspace to use for this project.
        - **Note**: Once a Slack workspace is selected, incident responders can create a dedicated Slack channel from their major incidents.

Congratulations, you viewed integrations. You have completed this lab!

Lab 5 - The lifecycle of a major incident

Estimated time: 30 minutes

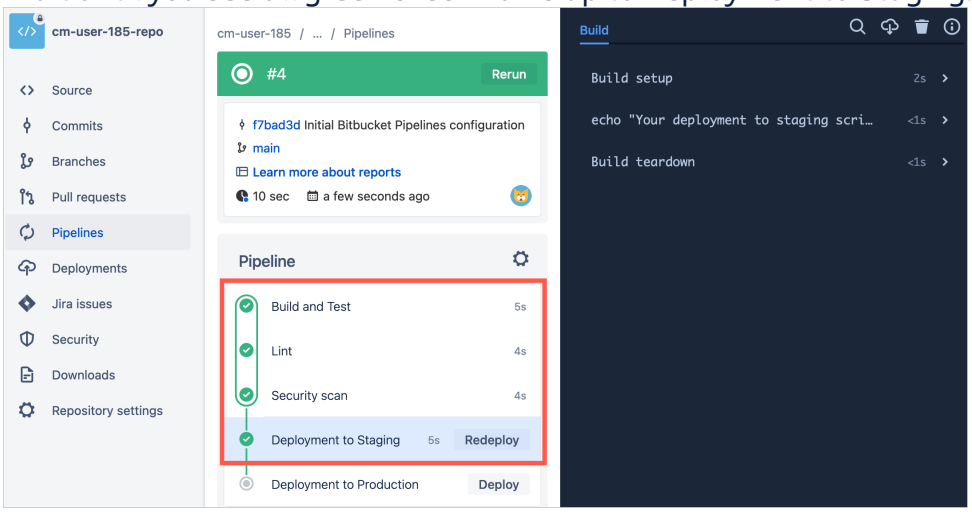
In this lab, you will:

1. Optionally, deploy the Payment service application
2. Create, link, and escalate incidents
3. Add responders and stakeholders and explore the major incident
4. Investigate a major incident
5. Close multiple incidents and create a post-incident review

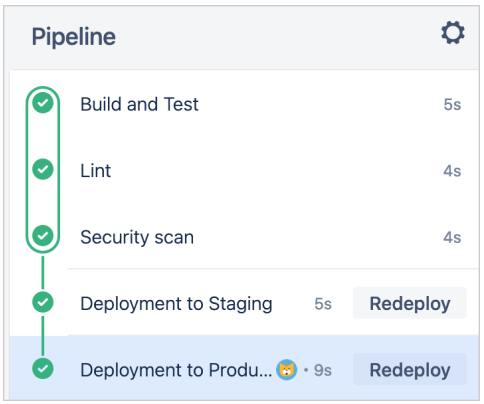
(Optional) Exercise 1 - Deploy the Payment service application

> ⓘ If you wish to see the deployment information in the major incident later in this lab, you can deploy the Payment service application from Bitbucket. Here you act as a developer who just made a change to the Payment service. A developer would access the repository in a different manner but for this exercise you'll do it through the service. To do this exercise you must have completed the previous lab to create the Payment service and add the Bitbucket repository.

1. As **Di**, in the **ITSM Help** project, go to **Services** page and open the **Payment service**.
2. Click the repository and this will open a new window and log you into Bitbucket.
   Note: You might be prompted for an additional login to Bitbucket.
3. In the repository sidebar, click **Pipelines**.
4. At the top of the Pipelines page, click **Run pipeline**.
   a. For Branch, select **main**.
   b. Leave Pipeline at **default** and click **Run**.
5. Wait until you see all green checkmarks up to Deployment to Staging.



6. To the right of Deployment to Production, click **Deploy** then **Deploy** again. Wait until you see the final green check for Deployment to Production.



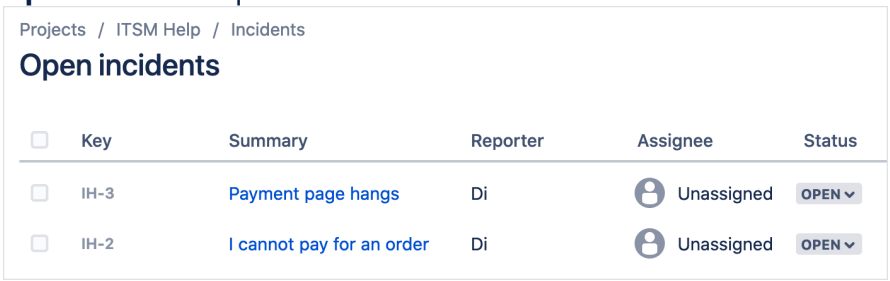
7. Close the Bitbucket window.

Congratulations, you deployed the Payment service application.

Exercise 2 - Create, link, and escalate incidents

ⓘ Here you create incidents on the customer portal and in the project. Then you perform actions on multiple incidents at once, such as linking and assigning incidents and notifying customers. Finally you mark one of the incidents as a major incident.

1. Create incidents on the customer portal:
   Note: Customers are seeing problems paying for their orders. Here you create two incidents through the customer portal as if you were two separate customers.
   a. Continuing as **Di**, if you still have the **ITSM Help** customer portal tab open, switch to that tab. If not, in the **ITSM Help** project sidebar, click **Channels**, then mouse over **PORTAL** and click **Open**.
   b. Create an incident:
      i. Select **Common Requests**, then **Report a system problem**.
      ii. For 'Summarize the problem', enter **I cannot pay for an order**.
      iii. For 'Describe what happened and how it occurred', enter any description, for example, **When I try to pay for an order the website hangs**.
      iv. For 'How urgently does this need to be fixed?', select **Critical**.
      v. For 'How big of an impact is the problem to your or the organization', select **Extensive / Widespread**.
      vi. Click **Send**.
   c. Near the top of the new incident, click **ITSM Help** to return to the customer portal and repeat the steps above to create another incident.
      i. Again select **Common Requests**, then **Report a system problem**.
      ii. Use a similar, but different, summary and description as this incident is related to problems using the payment system. For example, **Payment page hangs** and **I can't make a payment**.
      iii. For 'How urgently does this need to be fixed?', select **Critical**.
      iv. For 'How big of an impact is the problem to your or the organization', select **Extensive / Widespread**.
      v. Click **Send**.
   d. Return to the **ITSM Help** project and you should see your two new incidents in the **Open incidents** queue.



2. As an agent, create another incident in the project:
   Note: Here you log in as a service agent, Su. You can use a private/incognito window or a different browser so you can keep Di logged in as well and switch between them. If you can't do that, then you'll need to log out as Di (which will log her out of all her open browser tabs).
   You create one more incident but this time from within the project. Agents and other team members may create incidents (or any other type of service request) this way. Su has heard internal reports that the payment service is not working.
   a. Log in as **Su**, the agent, and go to the **ITSM Help** project.
   b. From the top menu, click **Create**.
      i. Ensure the project is **ITSM Help**.
      ii. For Request type, select **Report a system problem**.
      Note: The **Issue type** field value will adjust based on the selected **Request type.**
      iii. Show issue type fields by clicking and turning off **Use request type fields**.
      iv. For Summary, enter **Payment service is hanging**.
      v. For Affected services, start typing and select **Payment service**.
      vi. Click **Create**.
      - **Note**: If you set up your own phone number for Di's alerts, you will receive one now. This is a responder alert as the Payment Team owns the Payment Service and Di is a member of that team and is currently on call.

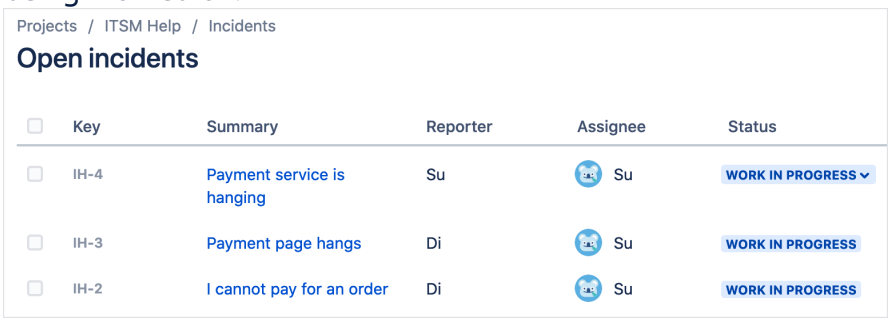
      vii. If you did receive an alert on your phone:
      1. You can acknowledge the alert on your phone, logging in as Di.
      2. Or, if you have a separate window/browser for Di open, return to that.
         a. Open Su's new issue, and in the right panel scroll down and click the **Responders** field.
         Note: If the Responders field is empty, refresh the page.
         b. For the Payment Team, acknowledge the alert by clicking the **Acknowledge responder alert** icon (tick).
      3. Return to Su's window/browser.
3. Perform actions on multiple incidents at once:
   a. As **Su**, in the ITSM Help project sidebar, click **Incidents**, then **Open incidents**.
   - **Note**: Su can see that these three incidents are all related as they all involve payment problems. First, she'll designate one of the incidents as the parent incident and link the other two to that incident. Then she'll save time by performing actions on all these incidents at once.

   b. Link all incidents together:
      i. Note the key or the summary for the incident you created as Su.
      ii. Select the two incidents you created on the portal as **Di** (Reporter is Di).
      iii. Above the list, click **Link issue** and select **relates to**.
      iv. Click in the next field and start entering the key or the Summary of the incident you created as Su, then select it.

v. Click **Link issue**. Once the issues are linked, you'll see a success message bottom left.

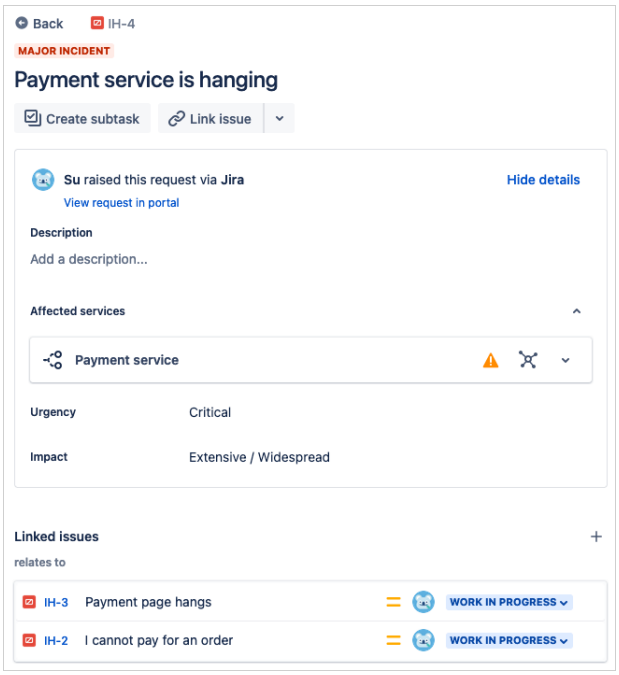
c. Assign all the incidents to Su:
   i. Select all three incidents and click **Assign**.
   ii. Select **Assign to me** and click **Assign**. Once the issues are assigned, you'll see a success message.
      - **Note**: Su would receive alerts for the incidents now. But since we didn't update her notification settings you won't get those alerts.

d. Update the status for all incidents and comment to all customers:
   i. With all three incidents still selected, click **Transition**.
   ii. For Transition, select **Investigate** and click **Next**.
   iii. On the **Respond to customer** tab, enter the comment **We're working on the problem** and click **Update 3 tickets**. Now all customers know the incident is being worked on.



e. View the bulk changes you made:
   i. Deselect all incidents, then open the parent incident that Su created.
   ii. Scroll down and you should see the two linked issues and the customer comment. The status (top right) should be **Work in progress**.
   iii. On the right, scroll down to the Responders field and open it.
      - **Note**: These are the users that will be responding to this incident. Because we are going to escalate this issue to a major incident, the Payment Team will respond so we'll remove Su as a responder.
   iv. Next to Su, click the **X** to remove her as a responder then click the left arrow to return to the issue.

4. Mark the parent incident as a major incident:
   a. Still in the parent incident, update Urgency to **Critical** and Impact to **Extensive / Widespread**.
      - Su knows at this point there are multiple incidents reported by customers for the same problem.
   b. In the right pane, scroll down and click the **Major incident** toggle to turn it on.
   c. In the incident, above the Summary, you now see it's marked as a **MAJOR INCIDENT**.



5. In the left pane, for the **Major incidents** queue, you should see 1 major incident. If you don't see this refresh your browser and wait a moment.
   Note: If you cannot see queues, click **Incidents** and then **Major incidents**.
6. Log out as Su.

Congratulations, you created and linked incidents and marked an incident as a major incident.

Exercise 3 - Add responders and stakeholders and explore the major incident

ⓘ Here you add a responder and a stakeholder to a major incident. You also start a conference call and see how to create a Slack channel for the incident response team. You now act as Di who's working the major incident. If you're using two browser windows, change to Di's window.

1. Add a responder:
    a. As **Di**, navigate to the **ITSM Help** project.
    b. Click **Incidents** and go to the **Major incidents** queue.
    c. Open the major incident.
    d. In the incident's right pane, open the **Responders** field.
    e. Click **Add responder** then search for and add **Mo**. He's a subject matter expert.
        - **Note**: Mo would receive an alert now.
    f. Click the left arrow to return to the Details pane.
2. Add an internal stakeholder:
   Note: Here you add an internal stakeholder who is not a responder but needs to be updated about the incident's progress. Once they're added, you can update stakeholders which will send an email message to them.
    a. In the major incident Detail pane on the right click the **Stakeholders** field.
        i. Click **+ Add stakeholder**.
        ii. Enter and select **orgadmin** and click outside the text box.
        iii. Click the left arrow to return to the Details pane.
    b. In the Activity section at the bottom of the incident, click **Inform stakeholders**.
        i. For Summary, enter **Major incident for Payment service**.
        ii. For Message, enter some text, for example, **The payment service is down. The response team is now working to resolve the issue.**
        iii. Click **Send**. An email will now be sent to the stakeholder.
    c. Under Activity, for Show, click **All**. Here you see a record of all the activity for the incident.
3. Start a conference call:
   Note: Here you start a conference call so all incident responders can collaborate on the incident via video. In this case, it's just you so you'll just explore it as yourself.
    a. In the right pane, for Conference call, click **Start call**.
    b. If you wish to join the conference, allow any popups for your microphone and camera.
    c. Click **Enter session** and this takes you to the conference. Other incident responders can join you here.
    d. Explore the conference options by mousing over the icons at the bottom of the screen.

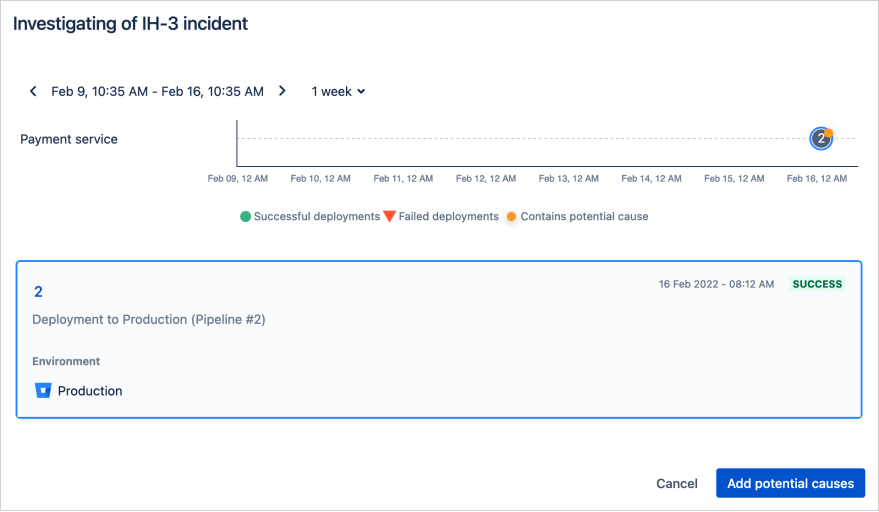
   e. Click **Leave** then **Leave** again to exit the conference and close the tab. Back on the incident, you now see the Conference call field with a pulsing red dot. Others will see this and can join the conference.
4. View how to create a chat channel:
   Note: Here you see how to create a chat channel. You won't actually be able to do this as you did not connect a Slack workspace in an earlier lab (Slack is not installed on your lab site). If you had a workspace connected, you could select it here.
   a. In the right pane, for Chat channel, click **Create channel** and view the options. The channel name, by default, is the incident key. The channel description shows the incident summary and a link to the incident.
   b. Cancel out of the Create new channel dialog.

Congratulations, you assigned responder roles and explored a major incident.

Exercise 4 - Investigate a major incident

> ⓘ Here you view recent deployments for the affected service. In the investigate view, you only see deployments here that were done after you mapped the Bitbucket repository to your service. Then you can select any deployment you think might be the cause of the incident. You might do this, for example, if a deployment was done immediately before the incident occurred.
> If you didn't deploy the Payment service at the beginning of this lab, you can open the Investigate view but you won't see any deployments.

1. At the top of the major incident, under the summary, click **Investigate**.
2. Click the circle containing a number on the timeline. You should see two deployments - the first one is the one you did to staging and the second is the one you did to production.
3. Click the second deployment. Now you see the deployment information appear at the bottom of the investigation view.
4. Mouse over the information for the Production deployment and click **Select as potential cause**.
5. At the bottom, click **Add potential causes**.



6. Back on the major incident you now see the deployment listed under Potential Causes.
    - **Note**: At this point, you'd want to alert the developer who deployed the Payment service so you'd likely open a Jira Software issue. You may have already brought the developer into the response team as an SME. If not, you would probably contact the developer directly, or assign the Jira Software issue to them, or mention them in the ticket. It depends on the processes in place in your organization. You'd also notify any internal stakeholders.

Congratulations, you investigated the incident and identified a potential cause.

Exercise 5 - Close multiple incidents and create a post-incident review

ⓘ The deployment has been rolled back and the payment service is back up and running so you resolve all the incidents and create a post-incident review.

1. Close multiple incidents:
    a. Navigate to the **ITSM Help** project's **Open incidents** queue.
    b. Select all the incidents and click **Transition**.
    c. For Transition, select **Resolve** then click **Next**.
    d. On the 'Transition to: Completed' dialog, for Resolution, select **Done**.
    e. For Comment, ensure you're on the **Respond to customer** tab and enter **Payments are now working,** and click **Update 3 tickets**.
    f. After a short time, the incidents will disappear from this queue and appear in the **Resolved incidents** queue.
        - **Note**: You've resolved all the incidents and let your customers (who opened tickets) know that payments are working again. To alert any other customers, you'd update your Statuspage.
2. Create a Post-incident review (PIR):
    a. Click **Back to project** then, in the project sidebar, click **Post-incident reviews** then open the **Open reviews** queue.
    b. Click **Create** in the top menu bar to create a **post-incident review**. You can also use **Start a post-incident review** button.
        i. For Type, select **Create a post-incident review post-incident review** if it's not already selected.
        ii. For Summary, enter some text, for example, **PIR for IH-4 Payment service is hanging** and create it.
    c. Refresh the page and open your new PIR.
        i. Under the summary, click **Link issue**.
            1. Under Linked issues, select **reviews**.
            2. Search for and select your major incident.
            3. Click **Link**. Note that you could also mark an incident as the primary incident of a PIR.
        ii. You could add the details of the post-incident review in this issue or you could link to a PIR document in Confluence. Click the **Link issue** dropdown and note the **Link Confluence page** option. Note you could also export the PIR to Confluence directly.
        iii. Scroll down the right Details pane and you see you can add approver groups and/or approvers. The default workflow for this type includes an approval step.

Congratulations, you closed multiple incidents and created a post-incident review. You have completed all the labs in this course!

Lab 6 - Best practices for incident management

There is no lab for this module.