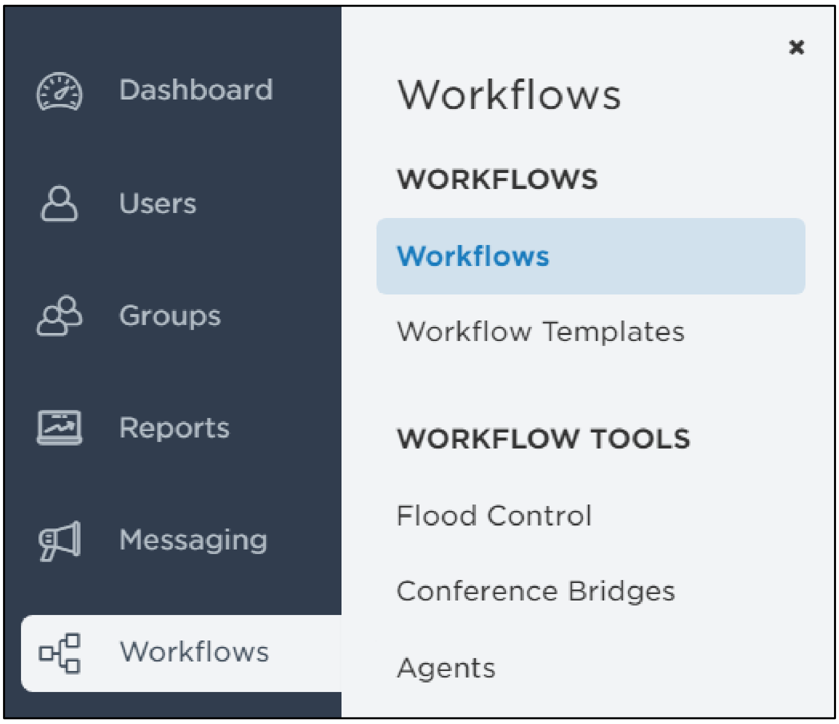
COVID-19: A workflow to help you help your people

We've put together a pre-built workflow to help you provide effective communication with your crisis management team and to inform and check on the welfare of employees using xMatters. The workflow includes some automated messages using Flow Designer.

Import the workflow

The first step is to import the workflow into your xMatters instance. First download the .zip file then go to the **Workflows** page (select Workflows from the Workflows menu).



You can find full instructions on importing workflows in the online help. If you don't have access to the Workflows menu, contact your local xMatters admin.

After it's imported, the workflow is ready to use to send messages from both the web interface and the mobile app.

Important note: your crisis management team name

Certain flows trigger notifications to the *Crisis Management* group. If your group is named something different in xMatters, you'll need to edit the value of the *Target Group Name* constant to use the name of your group.

For example, if your group's name is *Crisis Response*, open the workflow and go to the Flows tab. At the top-right, click **Components > Constants**. Select the Target Group Name constant and change the **Value** from Crisis Management to Crisis Response (or whatever the name of your group is). See Flow Components for information on editing constants.

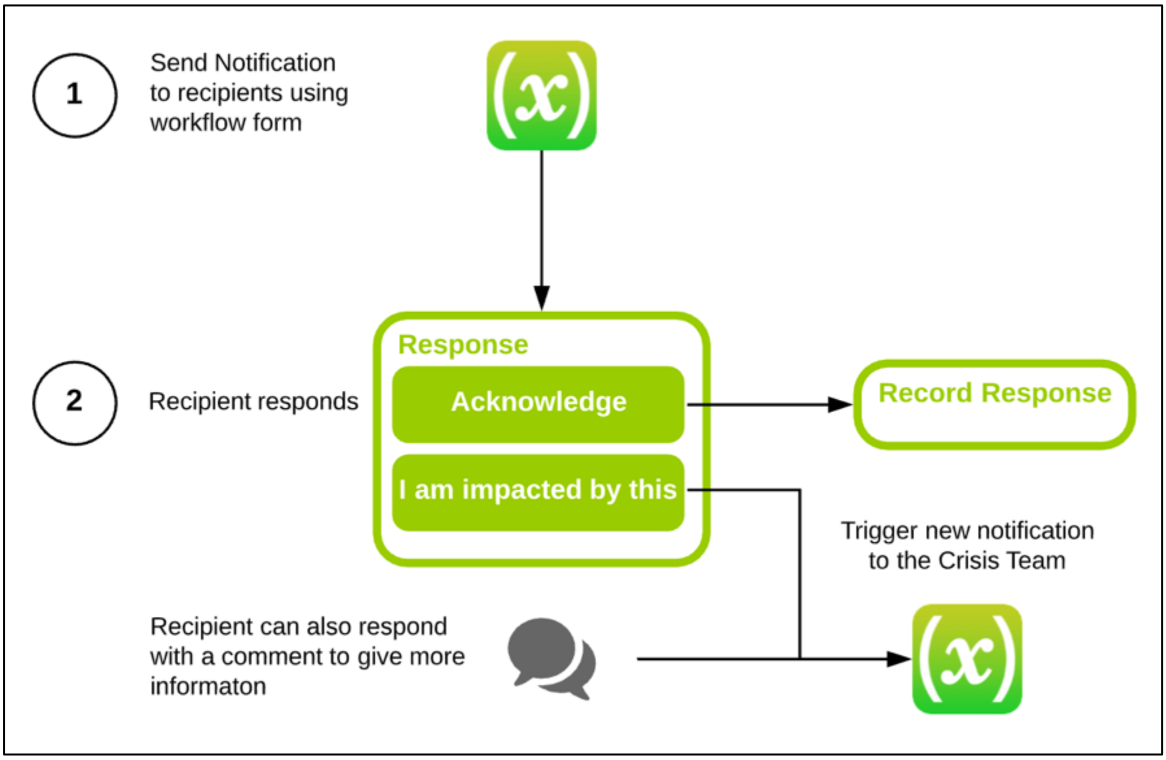
The workflow forms

The sections below outline each of the forms in the workflow and what they do.

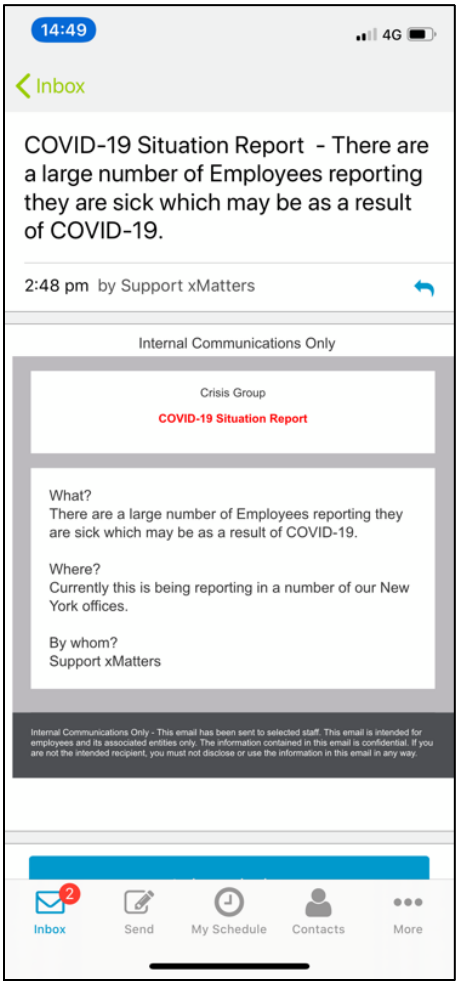
COVID-19 - Situation Report (with automated follow-up notifications)

Allow anyone with [sender permissions] on the form in xMatters to use the Mobile App or a web browser to report what they have seen or heard, and automatically inform the *Crisis Management* group of the situation if somebody responds to say they're impacted by the situation being reported.

Situation Report flow



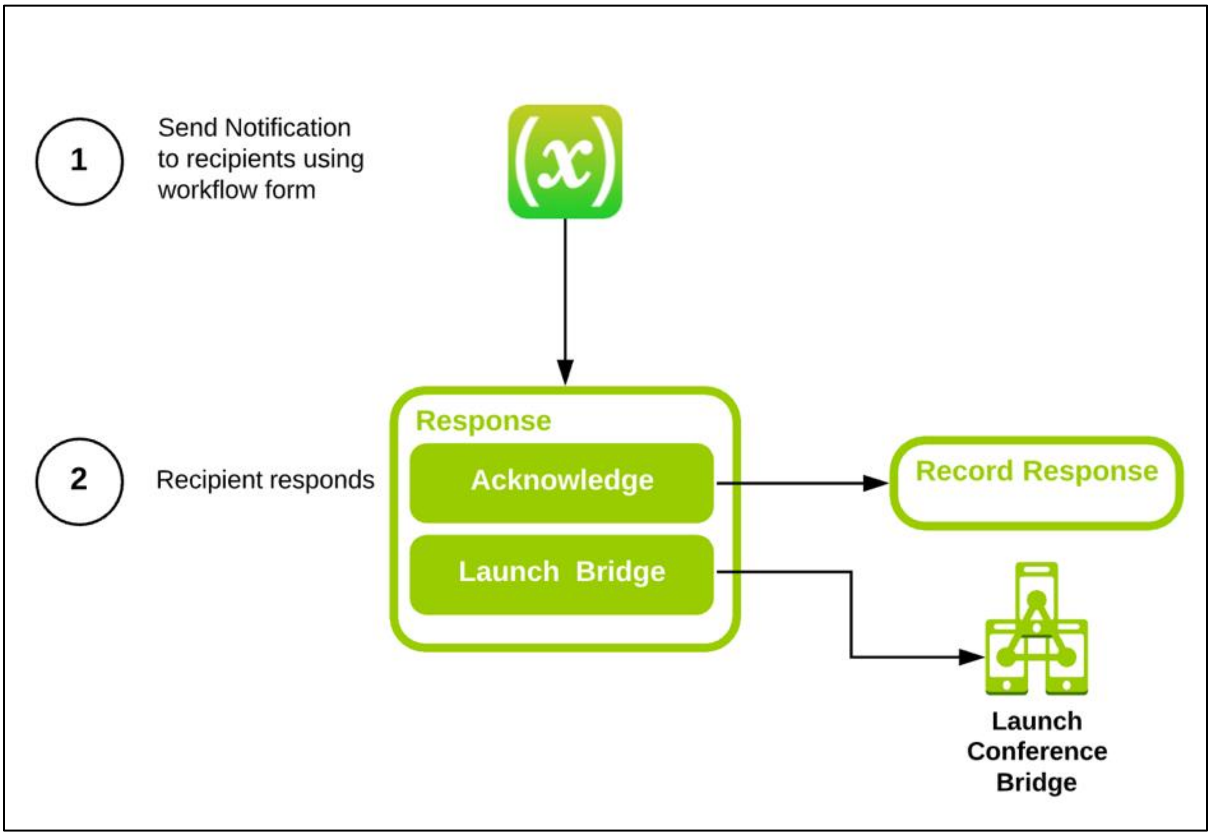
Situation Report message example



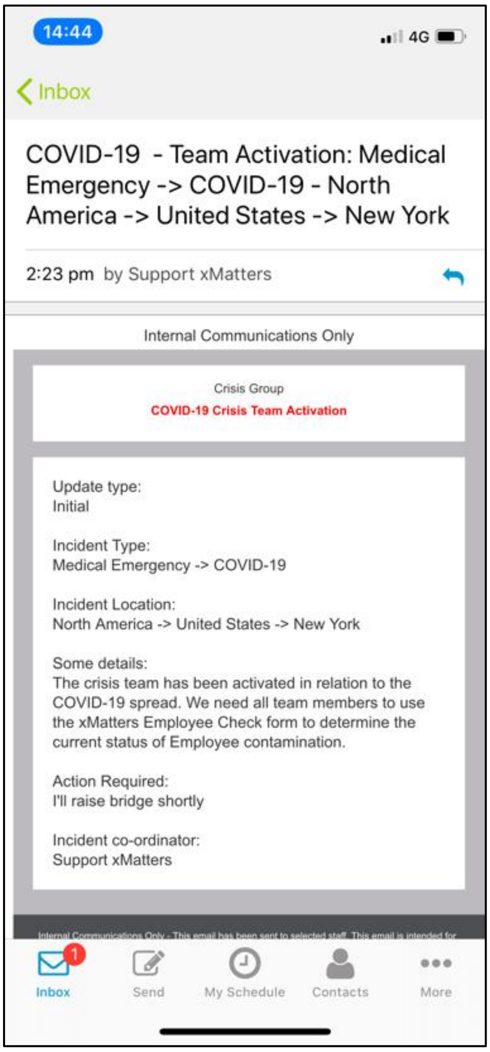
COVID-19 - Crisis Team Notification

Activate the crisis team and let them know what's required, as well as letting them launch a conference bridge by selecting a response.

Crisis Team Notification flow



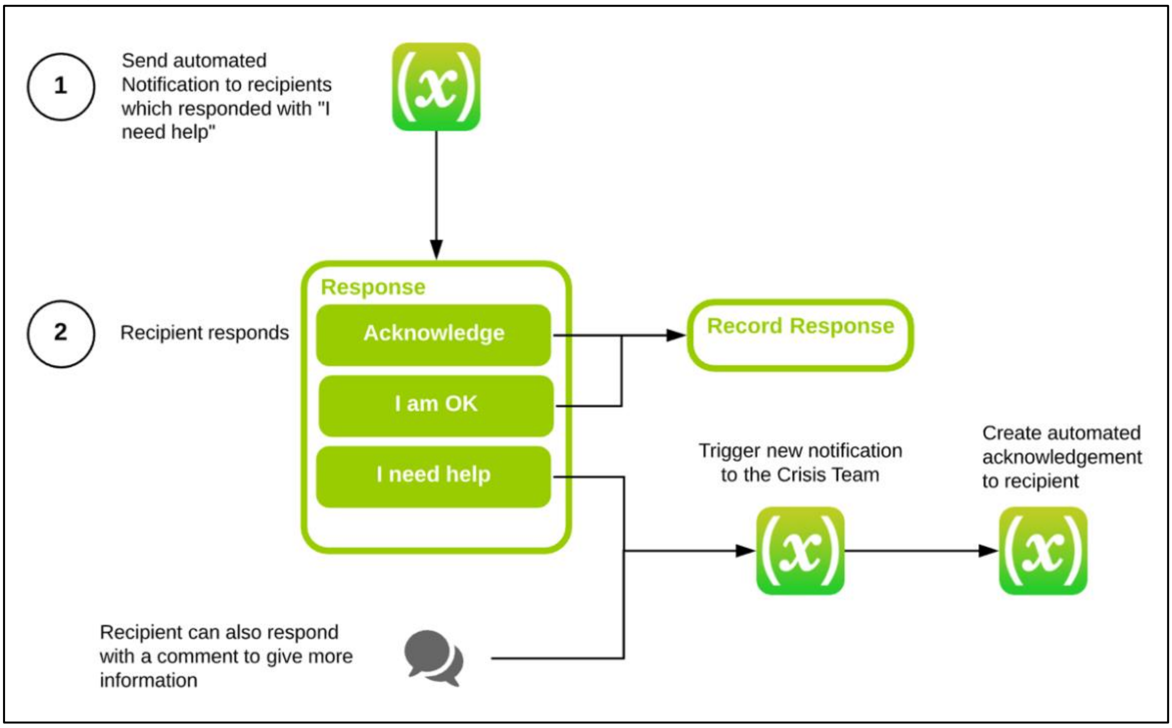
Crisis Team Notification message example



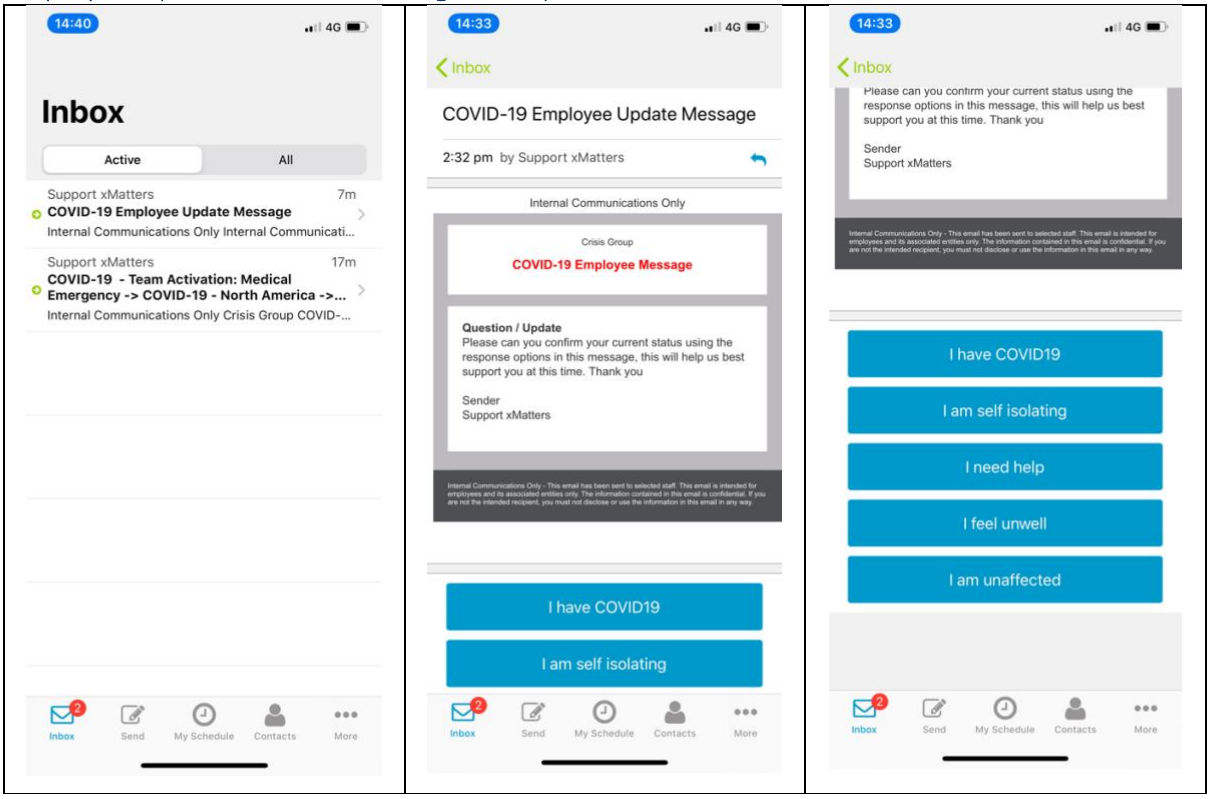
COVID-19 - Employee Update & Check

Check on your employees, send them updates and give them the option to respond. If they respond with **anything other than** "I'm unaffected", the flow automatically sends a new message to the crisis team to let them know somebody needs help (meaning the team doesn't have to constantly be monitoring the Tracking report for responses) and triggers an automatic response back to the employees, acknowledging their request for help.

Employee Update & Check flow



Employee Update & Check message examples

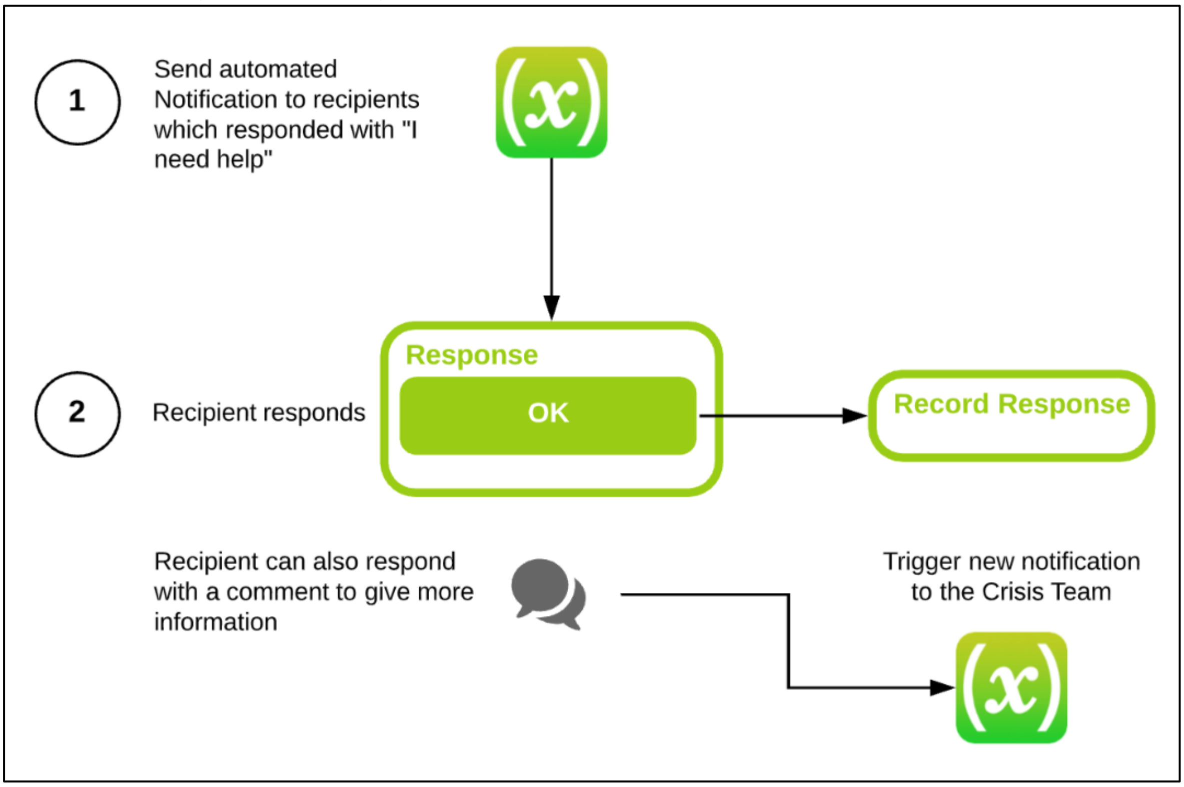


COVID-19 - Help is on the way (automated)

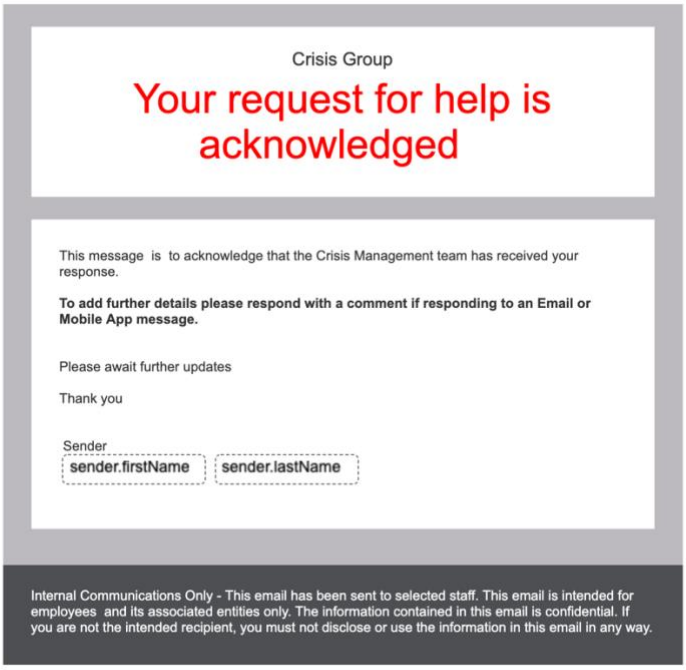
This is the automated acknowledgement message sent to employees who respond with anything other than "I'm unaffected" to assure them the crisis team has been informed of their situation.

This appears as undeployed in the list of forms – it's still working! Undeployed just means you can't use it to send manual messages from the web interface or mobile app.

Automated Help is on the way flow



Automated Help is on the way example message



Crisis Group

Your request for help is acknowledged

This message is to acknowledge that the Crisis Management team has received your response.

To add further details please respond with a comment if responding to an Email or Mobile App message.

Please await further updates

Thank you

Sender
sender.firstName sender.lastName

Internal Communications Only - This email has been sent to selected staff. This email is intended for employees and its associated entities only. The information contained in this email is confidential. If you are not the intended recipient, you must not disclose or use the information in this email in any way.

COVID-19 Crisis Management Team Update from recipient (automated)

This is the automated message sent to the crisis management team when a recipient adds a comment or indicates they need help.

This appears as undeployed in the list of forms – it's still working! Undeployed just means you can't use it to send manual messages from the web interface or mobile app.

COVID-19 - Conference Bridge (manual & automated)

This form is used when the "Launch Bridge" option is selected in the Crisis Team Notification flow. You can also use it to manually launch a conference bridge – this is a great way to get your team together to collaborate and work on solving the problem together.

Customizing this workflow

There are a couple of common ways you might want to customize this workflow, either for your immediate COVID-19 response or to use as a template for a future crisis response situation.

Changing the response options – the responses for some notifications have been customized specifically for COVID-19; they're our best guess at the responses your team and employees will need. But you can change them to suit your needs. You can find the response options by clicking **Edit > Responses** beside the form on the Forms tab. Keep in mind that some flows trigger off certain responses.

See the online help for more information on editing responses.

Changing the message content – maybe you have specific information you need in your messages, or you want to link to a particular website. Click **Edit > Messages** beside the form on the Forms tab to change the message content.

See the online help for more information on editing the message content.

If you know your way around workflows and Flow Designer, you can fully customize the flows and automated notifications to meet your needs.