Incident Management and SLM and Operational Level Agreements Quick Flow Demo Card

SMA-X 2017.11

**Background**

|  |  |
| --- | --- |
| Key Messages | * Service Level Targets help manage work prioritization and notify the relevant people to ensure Incidents get handled in the agreed upon timeframes. * Incident models can be used to capture the intrinsic knowledge agents have about how to diagnose and solve common incidents. Task plans contain all the steps (manual and automatic) needed for the diagnosis and resolution. Tasks can be assigned to multiple people allow work on the Incident to proceed in parallel. * SLT achievement and Incident creation rates can be seem in the Reports area or on your Dashboard. |
| Customer Challenge | * Agents aren’t sure which Incidents to work on first and lack visibility in to the response time agreements that have been made with the business. * Experienced agents know how to diagnose and solve difficult Incidents, but that information is not available to new agents – leading to resource contention for the best agents and longer resolution times. * Incidents that require a multi-disciplined approach are passed from team to team, rather than each team working on their part of the issue in parallel. |
| Engage Them | * Do you need a way to better prioritize Incidents to ensure that your SLAs are met? * Do you want to be able to capture the steps your more experienced agents take to diagnose and solve incidents? * Do you want to be able to assign work on an Incident to multiple people at the same time, while keeping ownership with a single person or group? |
| Differentiators | * Manage your Incidents based on SLAs and OLAs to provide prioritized service to mission-critical applications and meet the expectations of the business. * Monitor your SLA and OLA performance with dashboards and reports. * Incident models standardize the incident triage and resolution process for faster resolution and better use of your expert resources. * Use on-call schedules to ensure that incidents are assigned to the right people at the right times for faster resolution. * Subscriptions allow you to understand who is being impacted by the outage. |

**Quick Flow**

The goal of the Quick Flow demo card is to provide a benefit oriented *overview*, to *introduce* the customer to value and solution. It should be completed in ~5-10 minutes; optional sub-flows to demonstrate more of the solution may be included below. Make sure your demo environment is ready – see demo set up below. After practicing and perfecting the flow, you might want to copy and paste the rightmost Cheat Sheet column (below) to serve as a printed or electronic guide during the demo.

## Use Cases

Use Case #1: Home page and SLA prioritization help agents prioritize work more efficiently

Use Case #2: Incident Creation expedited with Smart Suggestions and Incident models

Use Case #3: Incident Escalation leveraging On-call schedule

Use Case #4: Notify subscribers

Use Case #5: Incident Resolution

Use Case #6: Monitor your Service Level Targets for SLTs and OLTs

Use Case #7: Incident Review and Closure

Use Case #8: Incident Reporting to monitor trends over time

Optional Sub Flows

* Work schedule for agents
* Agent notification preferences

| **Do** | **Say** | **Cheat Sheet** |
| --- | --- | --- |
| **Use Case #1: Prioritize Incidents more efficiently**Home Page  * Login as [Jennifer.falconmf](mailto:Jennifer.falconhpe@gmail.com) and go to Incident mgmt. * Go to Incident Home | The Incident Home page provides quick filters to manage incident assignment. | * Incidents Home page |
| Prioritize Incident List by SLA target time  * Incidents – Active view * Sort by **Next Target Time** to see those that are expiring soonest | Sort the Incidents list by SLA target time to focus attention on those incidents that need to be resolved quickly. The Next Target Time takes the duration defined in the SLT Definition and accounts for both the Work Schedule and Holidays if these have been specified.    SLA Notifications for upcoming breach conditions are sent to maximize the likelihood that the Target will be met:   * At 50% of the elapsed duration the Owner and Assignee will be notified. * At 75%, 90%, and at 100% (breach) the members of the Service Desk group and the Expert assignment group will be notified | * Incident List – Active View * Sort by Next Target Time to see incidents expiring soonest |
| **Use Case #2: Incident Creation expedited with Smart Suggestions and Incident Models**  * Press “New” * Fields on the New incident form   + Title: “Exchange response times are degrading”   + Description: “Monitoring shows that response times are getting bad. Users are likely to start reporting issues with Outlook.”   + Service: See **SMART Suggestion** for Service in blue, select “Clcik in the Service field and wait for a little bit to see if the “(Demo) Exchange Service appears in blue at the top of the list” *(this doesn’t seem to work consistently, if you don’t get any smart suggestions, just go on to select the (DEMO) Exchange Service)*   + Model: "Unacceptable response time on Exchange" (make sure you don't forget this as you cannot set it up later) * Save   + Impact: Enterprise   + Urgency: Severe Disruption * Save | An operator who is checking the monitoring dashboard has noticed that the Exchange Service is experiencing poor response time. He decides that an Incident should be created in the Service Anywhere to track this issue and get it investigated and resolved.    Note: This Incident could be created automatically from a monitoring tool, for instance using Operations Bridge (OMi) that is directly integrated into SAW. This could be configured to happen with or without the operator involvement.  Note how our Smart Analytics are offering a smart suggestion for the most likely Service name(s) in blue.  Notice how the model automatically fills in the Category and the Assignment fields. | * ”New” Incident * Title: “Exchange response times are degrading” * Description.” Monitoring shows that response times are getting bad. Users are likely to start reporting issues with Outlook.” * Impact: Enterprise * Service: “(Demo) Exchange Service” offered by Smart suggestion * Urgency: Severe Disruption * Model: "Unacceptable response time on Exchange” * Category and assignment are automatically filled by the Incident model * Save * Impact: Enterprise * Urgency: Severe Disruption * Save |
| Incident Triage leveraging Incident Models  * Show workflow is at the Initial Support phase. * Update owner to yourself Jennifer.falconmf and save * Highlight that the **Incident model** has already created a pre-defined Task plan (2 tasks on Initial Support phase in the task plan) * Jennifer.falconmf will get a notification in gmail from the first task (automated) in the task plan:   + Subject like "Incident xxxxx was sent to you"   + Also a notification that the manual task was assigned to your group * Complete the pending manual task by clicking on the link in the email notification or go to the Task Queue (new tab)   + Mega Menu > Tasks > MY GROUP TASK   + Select the 'Collect Log Files' task   + Open the preview pane   + Lifecycle widget > Validate > Save | The Workflow tab shows the out-of-the-box workflow for Incidents that is based on ITIL. We are in the Initial Support phase at this point.  The Incident model has automatically classified this incidents with the appropriate category and assigned it to the appropriate groups.  Incident models allow us to standardize incident triage activities and tasks allow us to assign parallel activities to multiple workgroups to expedite the resolution process. The first task in the plan is an automated task with a business rule to send a notification (email) to the Service Owner to alert him that there is an escalated Incident for his service.  Now, the manual 'Collect Log Files' task is active and in the Task Queue for anyone in the 'E-mail / Webmail' group - including me. From the Preview in the Task Queue I can see information about the task and the parent record. I can also navigate to either the full parent record or the full task details if I need more information. If I have enough information I can edit the task directly in the Preview and mark it Completed. | * Workflow tab at Initial Support * Owner to yourself * Review email notification if you are the service owner * Mega Menu > Tasks > MY GROUP TASK * 'Collect Log Files' task * Open the preview pane * Lifecycle widget > Validate > Save |
| **Use Case #3: Incident Escalation leveraging On-call schedule**  * Update Urgency to 'Total Loss of Service'   + Point out that the Priority has changed to Critical * Set Current Assignment to Expert Group and click outside that field somewhere else on the record, * Point out that the **Expert assignee is automatically populated with the on-call person.** Click on the Expert Assignee drop-down to see that the on-call people are listed first. * Press **Escalate**, Save * Highlight that the workflow widget and tab now show we are in the Escalate phase. | * Review of the log files has shown that a server is down causing a total loss of service. We need to engage the Expert Group to resolve this as quickly as possible. * The Expert Assignee is automatically filled with the on-call person based on the on-call schedule. You notice when I select the Expert Assignee field dropdown there is a section at the top that lists the on-call personnel first, then members of the group and then a section that lists all users. This allows for automatic assignment or I can manually override and quickly select the most appropriate assignee, with the flexibility to assign any user. * Escalation allows us to get higher priority attention to the issue for faster resolution and to send out additional notifications. | * Urgency: “Total Loss of Service' * Current Assignment: Expert Group * Expert Assignee is automatically set to the on-call person in the Expert Group * Escalate, Save * Workflow tab at Escalate |
| **Use Case #4: Notify Subscribers**  * Mouse over the Service field on the Incident and select the Service name * Click on Subscriber tab of the Service to see the subscribers and subscriber groups | * Next we want to determine who is being impacted by this severe outage so we can send out appropriate notifications. * Note, we can Export to xls the subscribers or groups to get email addresses to send an email using an email client. | * Go to Service * Subscriber tab * Optional, export subscribers to xls |
| ***Optional Live Support Flow extension*** | *At this point you have the opportunity to jump to the ‘Live Support’ demo flow in the Self-Service demo card to show how the Suggested Solutions can help link the end user reporting they are experiencing slow response time from Exchange (support request) to the Incident.* |  |
| **Use Case #5: Incident Resolution**  * Switch back to the Incident (If you have done the Live Support flow, then you can bring it up from the Request) * Refresh (if necessary) * General>Resolution   + Solution: 'Rebooted the server'   + Completion code “Resolved with workaround”   + Check the Problem candidate box   + Check the Knowledge candidate box   + Save * Workflow is now in the Review phase | The Expert assignee determines that rebooting the server would be the fastest way to resolve this Incident. Once that is complete, I'll set the solution. I also determine that this Incident is a candidate for both a Knowledge article and a Problem investigation (rebooting the server isn’t a good long term solution)  Since this resolution was a short term workaround, we have marked it as a Problem Candidate. A Problem should be opened to perform root cause analysis to prevent such a critical issue from happening again in the future.  The Review phase can be used to determine if the incident escalation process performed optimally and if any other workarounds should be noted in the KM article and any additional information should be added to the Problem record. | * Incident * Solution: 'Rebooted the server' * Completion code: “Resolved with workaround” * Problem candidate * Knowledge candidate * Save |
| **Use Case #6: Monitor your Service Level Targets**Monitor the IM SLT Achievement for this Incident  * Incident from above > Targets tab * Expand the Service Level Targets and Operational Level Targets sections * Refresh button right above Service Level Targets section (if required)  View the IM SLT Achievement Report  * Mega Menu > Dashboard * SLT achievement rate for incidents  View the IM OLT Achievement Report  * Mega Menu > Dashboard * Status of active Time in Group OLTs | Now that we've resolved the Incident, let’s check how we did against our SLTs. We see that we (achieved/failed) the Initial review target and (achieved/failed) the Resolution target.  We can also check how the teams did relative to their Operational Level Agreements. For each group that was assigned to the Incident we will see an Operational Level Target (OLT). We can see how long it was assigned to each time and whether the team met the duration target. In this case we only had one team work the Incident so only one OLT was created.  Let's check our current Service Level Achievement metric for Incident Management. I have the “SLT achievement rate for incidents” report on my dashboard, so I can see that I have an achievement percentage of ~X% last week/month and ~Y% for the current week/month. If I want to see how I’m doing on the Initial Review or Resolution SLT specifically, I can switch to a different report.  Let’s check our Operational Level Target metric for Incident Management. I have the “Status of active Time in Group OLTs” report on my dashboard, so I can see how many incidents the groups met their OLTs and how many they breached. | * View the SLT status * View the OLT status * View the “SLT Achievement rate for incidents” Report * View the “Status of active Time in Group OLTs” Report |
| **Use Case #7: Incident Review and Closure**  * Back to our incident, Workflow is in the Review phase * Close the Incident   + Lifecycle widget > Close   + Save | In the Review phase, I would check various sources (such as related Support Requests in the SRM module - if any) to determine if the Incident is really addressed. I should also review the Problem candidate and Knowledge candidate fields and create problem and knowledge articles accordingly.  Once I have completed these activities then I will close the Incident. If I determine that the Incident is not resolved then, I can return the Incident back to the Initial Support phase for further investigation.  We have also implemented rules to automatically close the Incident when all the related Support Requests have closed. While the Incident is in the Review phase it will be checked daily, starting after 3 days, to see if all the related requests have been accepted by the end user and closed. If so, then the Incident will be automatically closed. If the review is completed prior to the Incident being closed automatically, it can be closed manually by the reviewer or Incident Owner. | * Close, save |
| **Use case #8: Incident Reporting** View the 'Incident closure trend' report   * Mega menu > Dashboard * Incidents closure (over time) * Gear > Edit report (brings you to Reports) * Report properties   + Review Group by options (Days, Weeks, Months, etc) but don’t save any changes * Back (browser) to return to the Dashboard | Now that we have closed the Incident, let's check what our trend has been for Incident closure over the past couple weeks. On my Dashboard I have an 'Incident closure trend' report. We can see how many Incidents have been closed for each of the past few days.  I can edit the report and view the data on different timescales - such as by week or by month. | * Dashboard * Edit widget * Highlight “group by” timescales |

# Optional Sub Flows

Customer intrigued after seeing this overview? Want to show more of the solution? Ideas for possible sub-flows/drill-downs:

| **Do** | **Say** |
| --- | --- |
| Work schedule for agents  * Show how an agent can configure their work schedule and vacations.   + Agent Interface, click on your photo/name in the upper right corner to access Profile and Preferences   + In the upper left corner of your Profile page, click on View Calendar   + Edit your calendar to add a vacation day or manage work hours   + Show how an agent can update an on-call schedule to take themselves off a shift when they are have a conflicting vacation. | * Agents can manage their own work schedule including vacations and update the on-call schedule as well. |
| Agent notification preferences  * Agent Interface, click on your photo/name in the upper right corner to access Profile and Preferences * In the list on the left, select Notification Preferences | * Agents can configure their notification preferences to specify when they receive notifications and which notifications they want to receive. |

# Demo Preparation on a new tenant

Demo data prep includes initial set-up tasks and items that must be checked before each demo (e.g., demo data changes over time, or to return to the pre-demo state). Be mindful of whether the changes are appropriate or needed for the demo tenant you’re using – e.g., for the shared demos, initial set-up is probably already done, and some changes shouldn’t be applied (e.g., theme)

## Initial Set-up

* Add [kimberly.quanmf](mailto:kimberly.quanhpe@gmail.com) and [Jennifer.falconmf](mailto:Jennifer.falconhpe@gmail.com) to the “E-mail/Webmail” group.
* Add '(Demo) Exchange Service' to the "Premium SLA" and “Premium OLA” under Support Agreements.
* Set [Jennifer.falconmf](mailto:Jennifer.falconhpe@gmail.cm) as the owner for the (DEMO) Exchange Service (in SACM).
* On the “(DEMO) Exchange Service” record, add a group subscription for the Cool Cake group. Add allan.gobicc as the subscriber (person). The subscriber (person) is mandatory but irrelevant to the group subscription.
* Create a new Run/Incident/Incident model: "Unacceptable response time on Exchange"
* General > General Model Details
* Service: (DEMO) Exchange Service
* Category: Software \ Application Server
* Default values > Assignment
* Current Assignment: Service Desk
* Service Desk group: “Service Desk”
* Expert group: E-mail / Webmail
* Task Plan > Initial support phase add a 2-task task plan:
* one automated (send notification BR)
* Title: Notify Service Owner
* Business Rules > 'Send notification'
* Recipient fx is ${entity.RegisteredForActualService.OwnedByPerson}
* Template is 'Default incident email template'
* Optional: create a new notification template specifically for notifying the Service Owner about the escalated Incident
* followed by one manual task
* Title: 'Collect Log Files'
* Assignment Group: 'E-mail / Webmail'
* Move the model to the active phase and save
* For tasks, create a view with a filter to show all tasks that are not Completed and save it as a public view with name, “Active tasks”.
* For the E-mail/Webmail assignment group, create a 24x7 on-call shift:
* Run > On-call Schedule
* Select the E-mail/Webmail group, View group calendar
* + Add on-call shift
* Time Zone: America/New\_York
* Start time: 8:00 am
* End time: 8:00 am
* Duration: 1 weeks
* Repeat On: Monday
* Effective from: today until No end date
* Rotate on every shift
* Add all members of group
* Add
* Modify the “E-mail/Webmail” group to use the “Automatic” assignment strategy.
* Create this analytic report: Incident closure trend (over time) by priority
* General
* Report name: Incident closure trend
* Record type: Incident
* Filter: Active=No and Phase ID=Close
* Group by:
* Close time by Weeks
* Priority
* Function: Count
* Chart type: Stacked Column
* Add to dashboard and position in the top left (2nd position)
* Create an “SLT achievement rate for incidents (weekly over time)” report
* Duplicate the “SLT achievement rate for incidents” report
* Filter by Active=No, and SLT.status=Achieved, Failed
* Change the Group by parameter to be “Creation time by weeks”, then SLT.Status
* Function: Percent per group by Count
* Display results: Sort by creation time
* Chart type: Stacked column
* Save as “SLT achievement rate for incidents (weekly over time)
* Add to Jennifer.Falcon’s dashboard and position in the top left (1st position)
* Add the “Status of active Time in Group OLTs” report to the dashboard and position it in the top left (3rd position)