IT Alerting User Guide

Everbridge Suite

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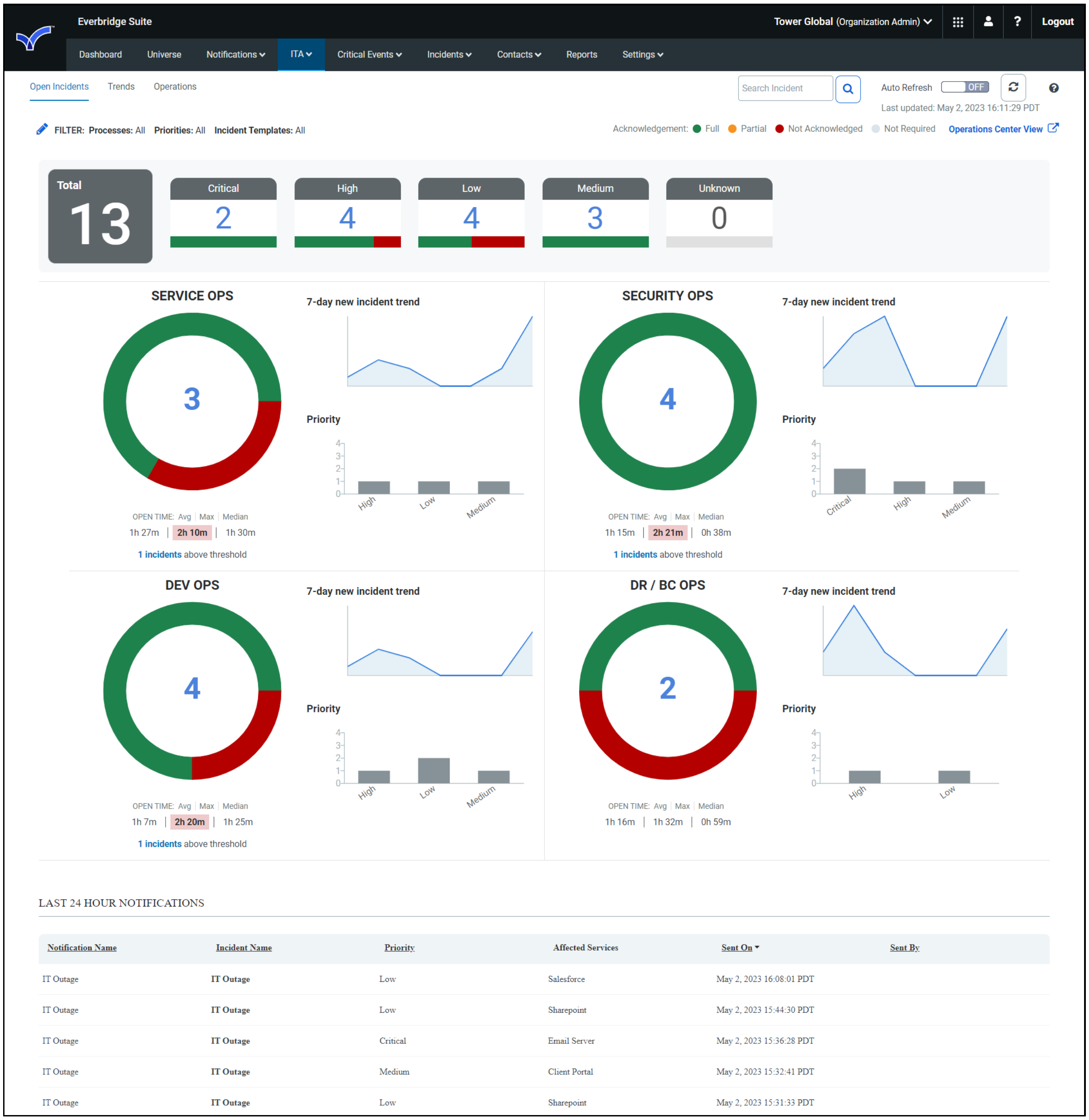
Everbridge software is covered by US Patent Nos. 6,937,147; 7,148,795; 7,567,262; 7,623,027; 7,664,233; 7,895,263; 8,068,020; 8,149,995; 8,175,224; 8,280,012; 8,417,553; 8,660,240; 8,880,583; 9,391,855. Other patents pending.

IT Alerting

IT Alerting automates and streamlines the way IT communicates during major IT Incidents to resolve issues faster and minimize their impact on the business. IT Alerting provides consistent messages to the right IT experts and keeps all stakeholders and impacted customers informed on resolution progress.

Open Incidents

When you first click on the ITA tab, you'll land on **Open Incidents.** This is also called the **ITA Dashboard,** where you can see your open ITA Incidents by priority and/or by process.

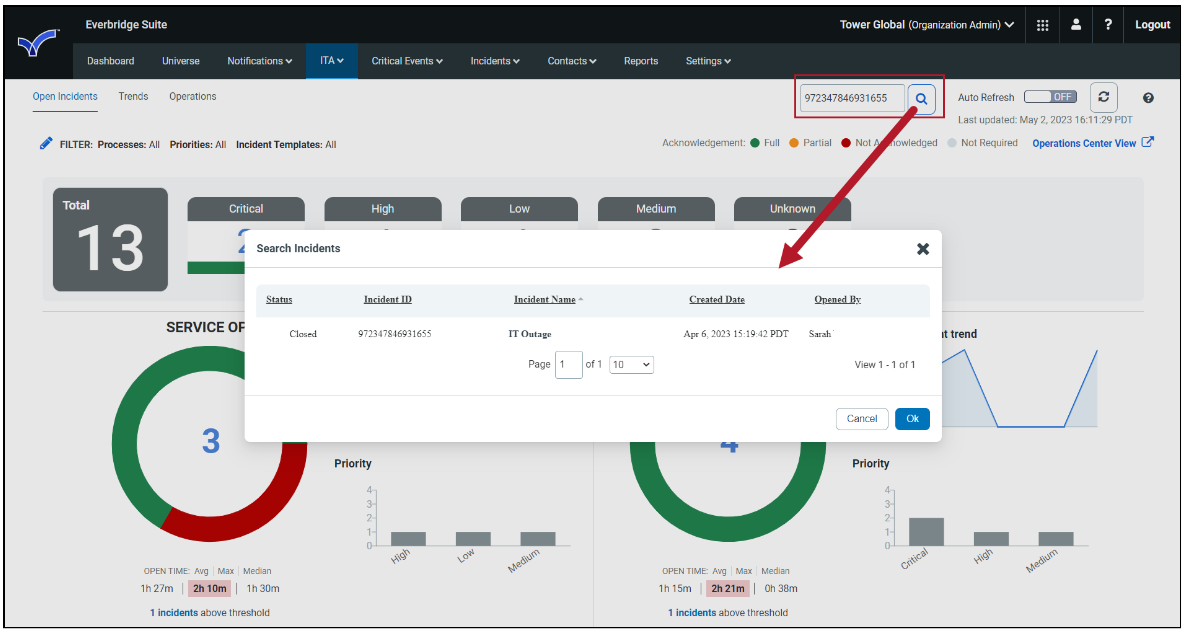


Searching for an Incident

To search for an Incident:

1. In the **Search Incident** field, enter any one of the following:
    - **Incident ID**—must be an exact match (the entire ID)
    - **Incident Name**—can be a partial match
    - **Opened By**—can be a partial match
    - **Resolved By**—can be a partial match
2. Click the **Search** icon.

   The **Search Incidents** dialog displays your search results.



Refreshing the Overview Page

To refresh the Overview page:

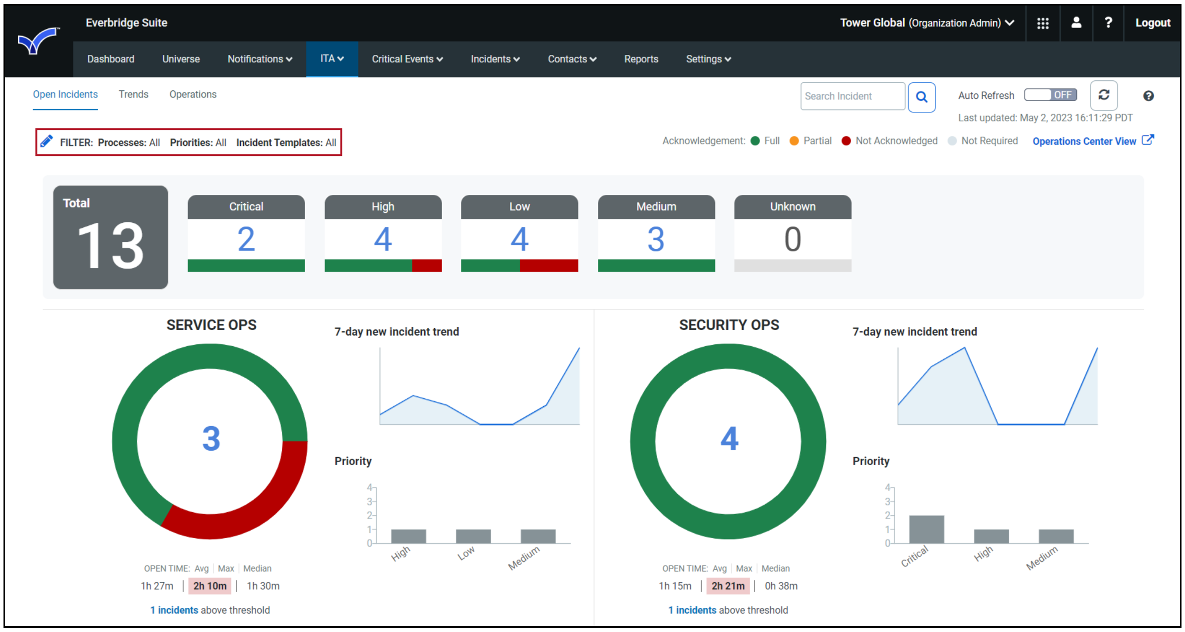
1. Manually refresh by clicking the **Refresh** button.
2. Alternatively, toggle Auto-Refresh to ON to refresh the page every minute. (To turn it off, toggle Auto-Refresh to OFF.)

Filtering Your Open Incidents

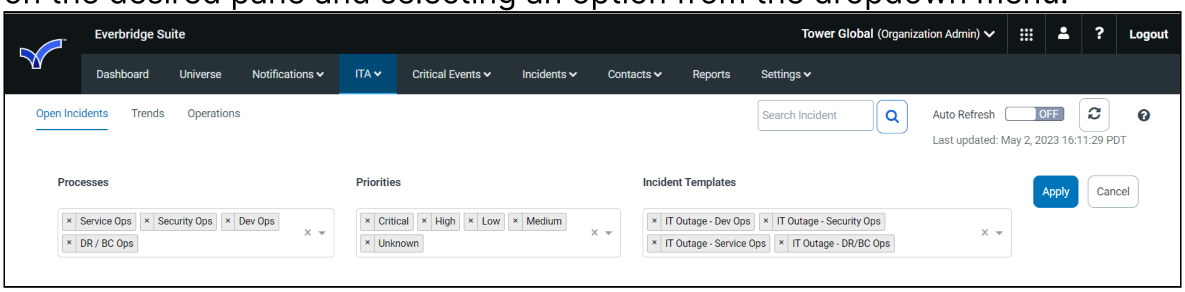
You can change your filter as often as you want.

To change the filters on your Incidents:

1. From the **ITA tab** > **Open Incidents** sub-tab, click **Filter** in the top-left corner.



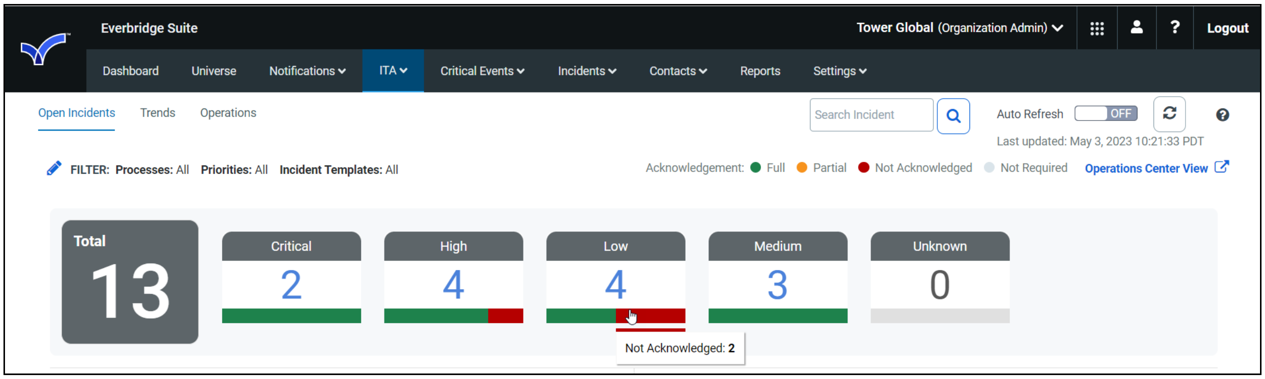
2. Add a process, priority, and/or Incident Template by clicking the down arrow on the desired pane and selecting an option from the dropdown menu.



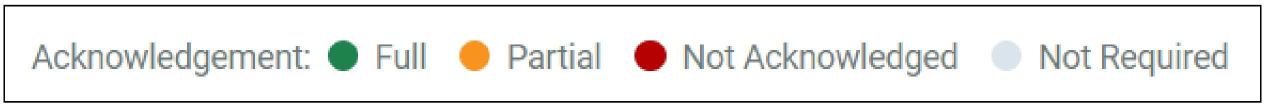
3. Clear individual processes, priorities, and/or Incident Templates by clicking the **X**, or click the X on the center right-hand side of the pane to clear all at one time.
4. When done, click **Apply**.

Open Incidents by Priority

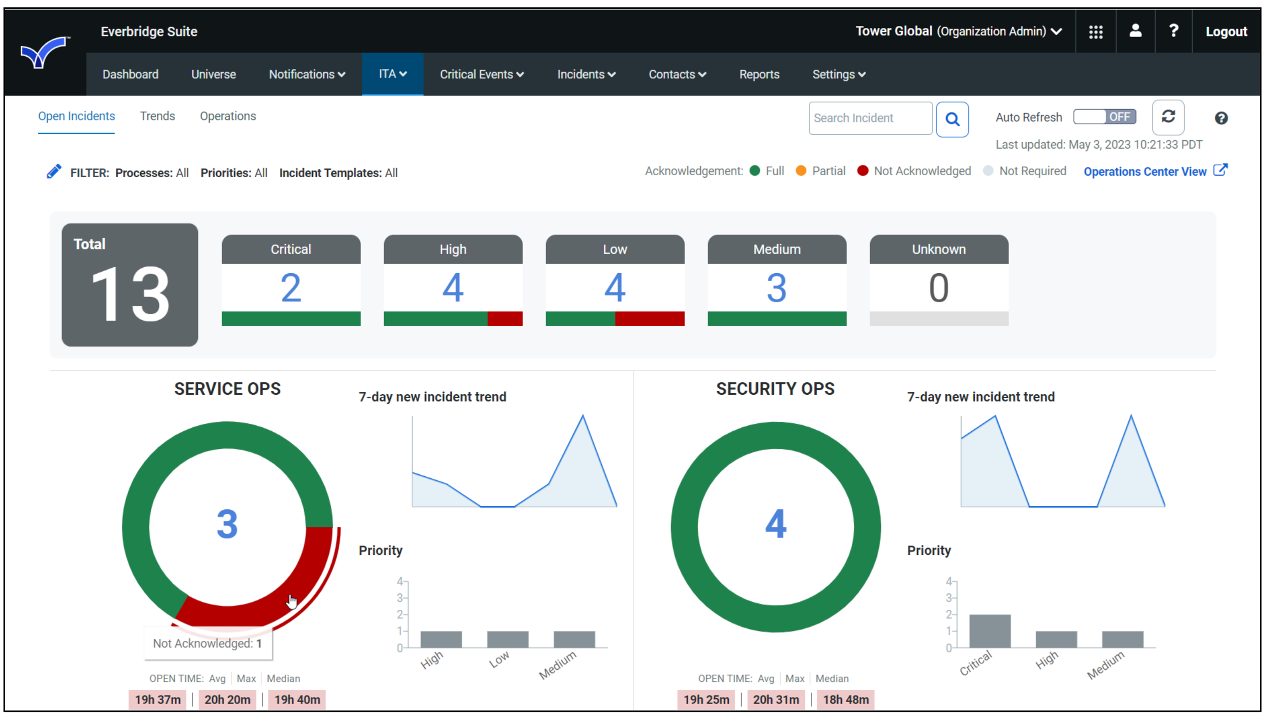
Depending on the priorities you have chosen via FILTER, you can see all of them individually, or filter your choices to only selected priorities. The Priority Boxes are listed alphabetically from left to right; uppercase alphabet before the lowercase alphabet. Each priority box displays the number of open Incidents with that Priority.



You can also find the legend of acknowledgment types near the top for reference.



When you hover the mouse over a color on a pie chart, the number of open Incidents for that acknowledgment type are displayed.



A priority box might display a 0 (zero). Other than 0 (zero), you can click a number in the center of a priority box to see the Operations view.

To set up your variables in Incident Management:

1. From your Organization's Incidents tab, select the Variables sub-tab.
2. Click **New Variable**. The New dialog is displayed.
3. Enter the following fields:
    - Type: Single Selection or Textbox
    - Name: Priority

4. Click **OK** to close the New dialog.

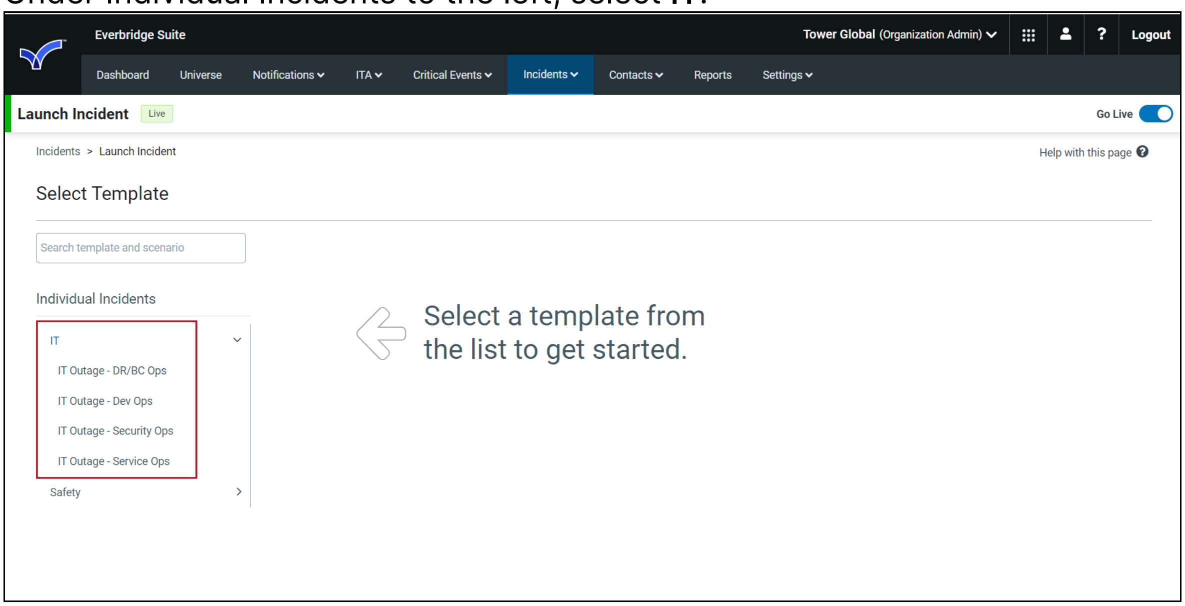
To create an Incident Template:

1. From your Organization's Incidents tab, select the **Templates** sub-tab.
2. Click **New Incident Template**.
3. Give your Incident Template:
   - Name: type a name for your Template (required)
   - ITA Process: select the desired process from the drop-down list (required)
4. Set up your Template, making sure to include the "Priority" variable on the Operator's Form among any other variables.

For details on creating an Incident Template, see the Incident Operator Guide.

To launch an ITA Incident:

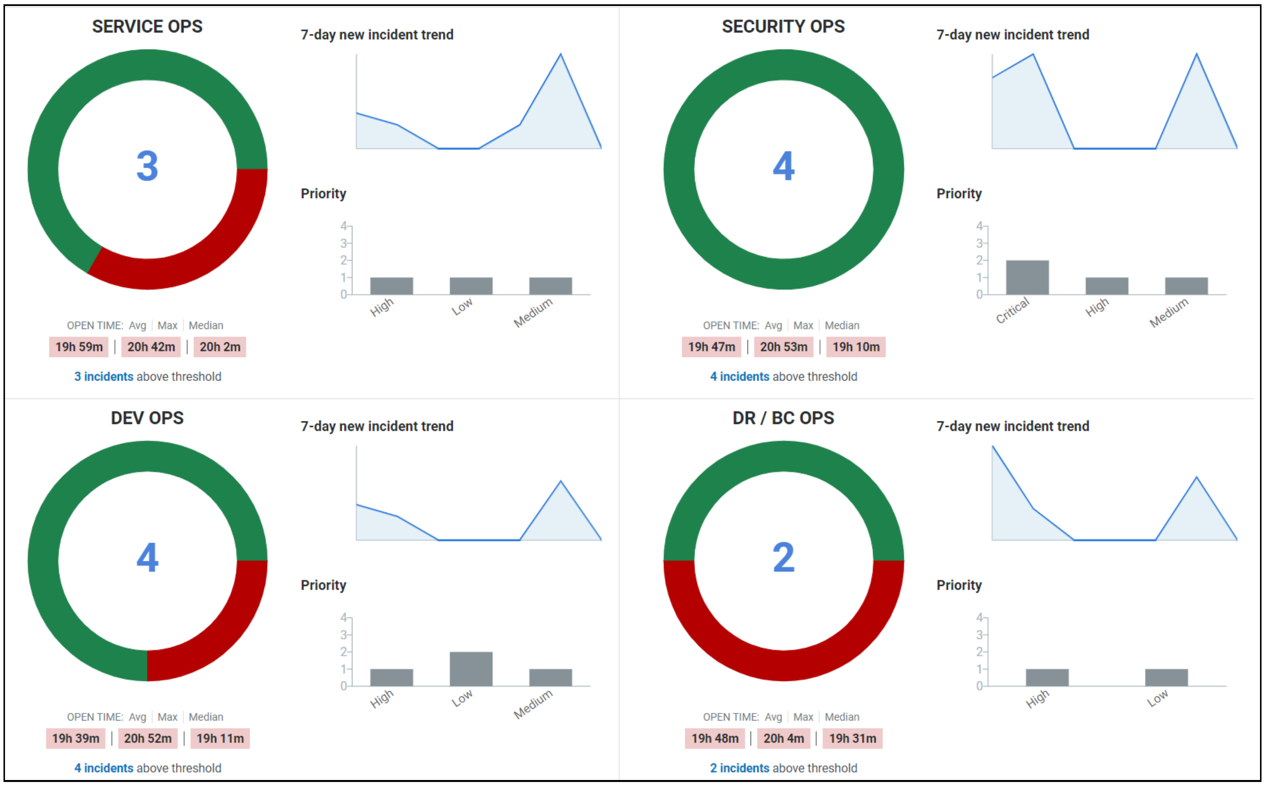
1. From your Organization's Incidents tab, click **Launch Incident**. The Launch Incident, Step 1 (of 2) screen is displayed.
2. Under Individual Incidents to the left, select **IT**.



3. Select the desired ITA template.
4. In the Operator's Form, enter your priority heading in the Priority field.
   - If a **Single Selection**, select the Priority heading from the drop-down menu.
   - If a **Textbox**, the text you type here will display as a Priority heading on the ITA tab.
5. Continue to fill in the fields of your Incident. For details on launching an Incident, see the Incident Operator Guide.
6. Click **Send**. Once sent, the Incident is added to the ITA database, and you can see the status of your open Incident from the ITA tab.

Open Incidents by Process

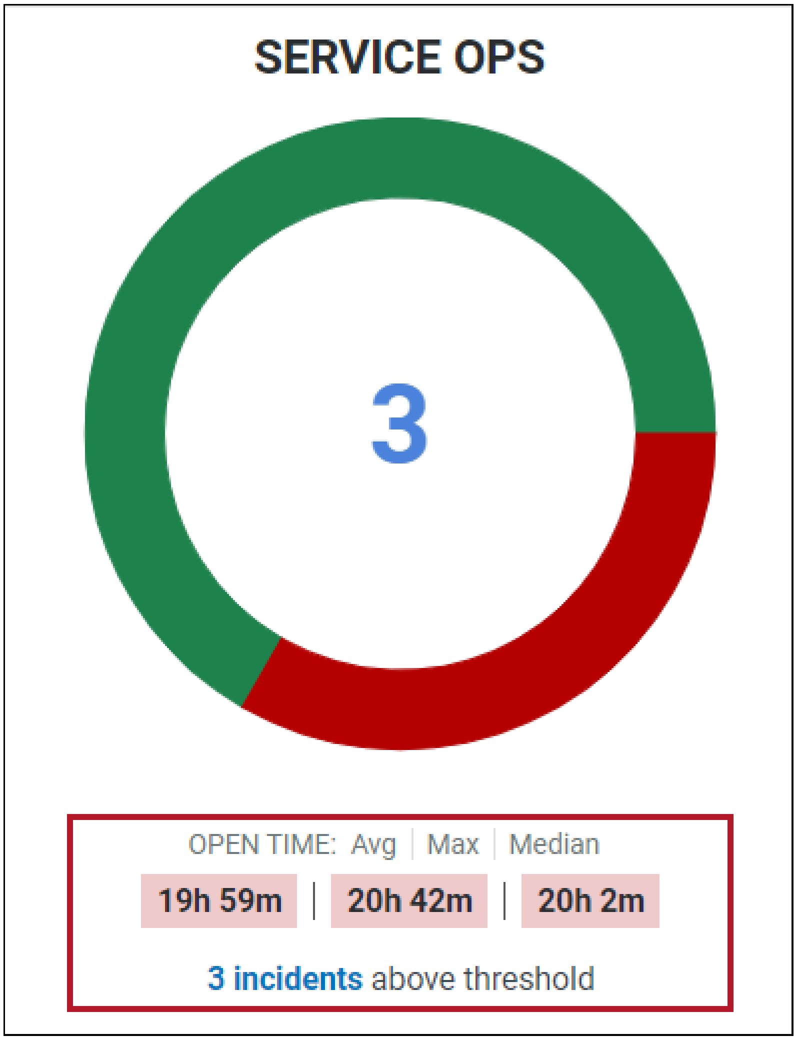
Under the individual priority boxes, you see up to four dashboard donut charts, each representing a process you have configured. You can have one to four processes, and you can rename each process in **Settings** > **ITA** > **Processes**.



As in the individual priorities, each process shows its acknowledgment status on the outer circle, and the total number of Incidents per process. Also as in the individual priority boxes, if you click the number in the center of the chart, the Operations (sub-tab) view is displayed. Furthermore, if you click an Incident name, its Incident Details are displayed.

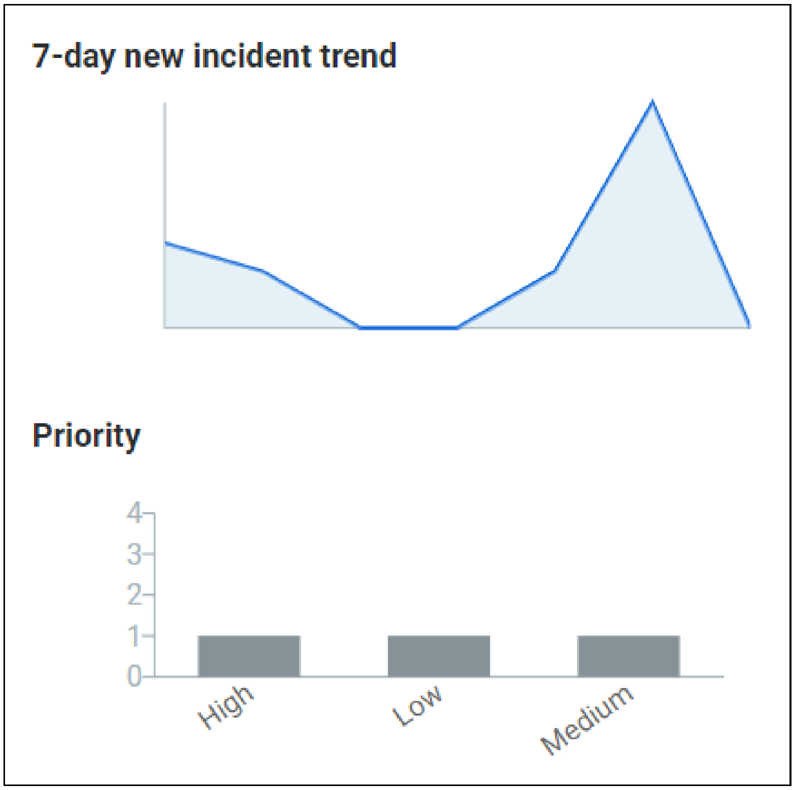
NOTE: You can see the Operations Center View by clicking the link in the upper right-hand corner of the ITA Dashboard. See Operations Center View.

Under the process charts, the Open Time of each process is displayed. First is an Average time of an Incident, then the Maximum time of an Incident, and lastly the Median time of an Incident. If a time is shown with a red background, it is over the threshold. You can set thresholds in **Settings** > **ITA** > **Thresholds**.



To the right of each process is a **7-day New Incident Trending** chart and a **Priority** chart. Hover the mouse over a chart and you see:

- **7-day new Incident** Trend—The number of newly created Incidents, by day, during the last 7 days
- **Priority**—The number of open Incidents by priority


7-day new incident trend
Priority
4
3
2
1
0
High
Low
Medium

Trends

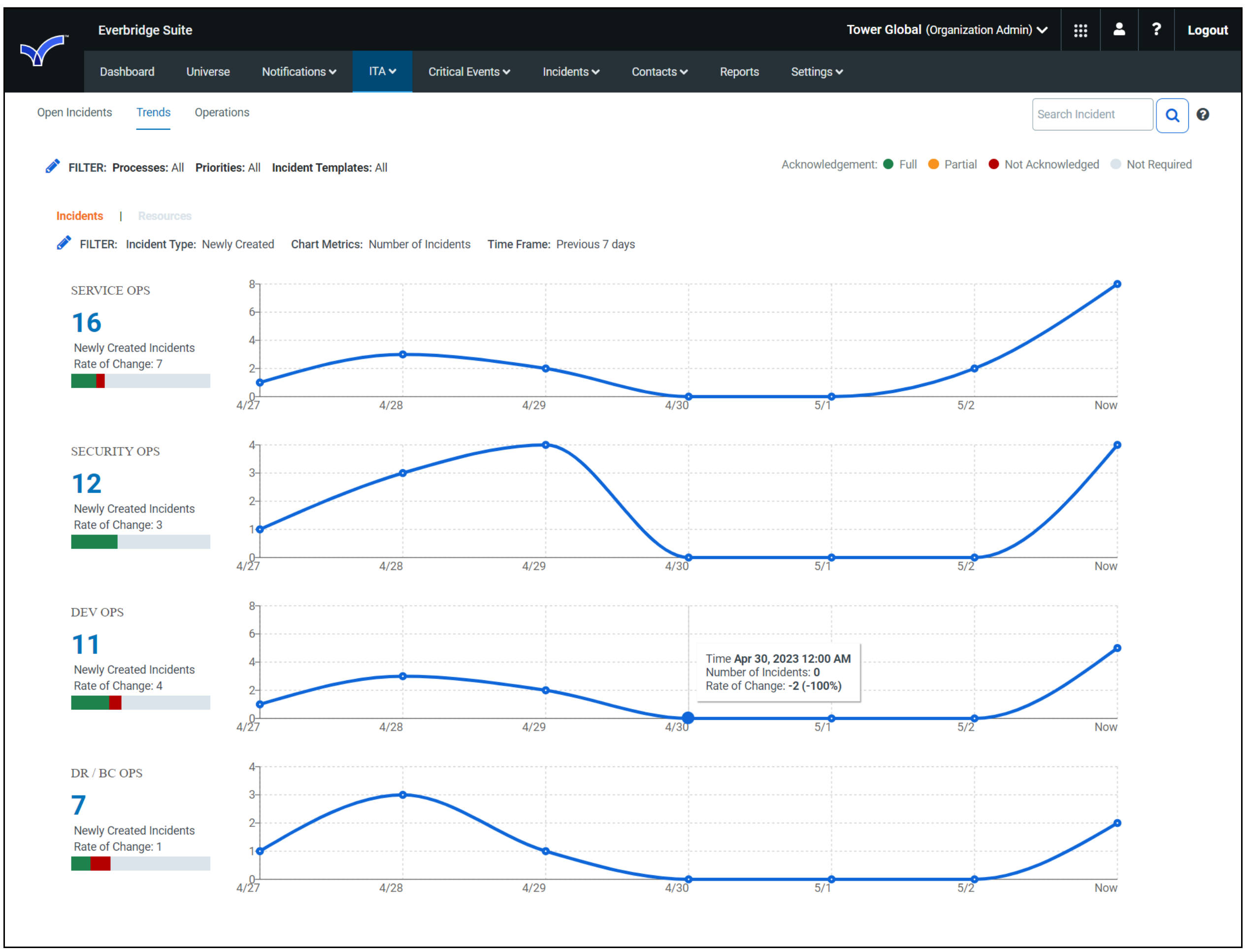
From the **Trends** sub-tab, you can see Trends via Incidents or Resources. Each process shows a summary section on the left-hand side of the Trends.

Trends by Incidents

You can filter the following:

- **Incident Type:** Newly Created or Closed
- **Chart Metrics:** Number of incidents
- **Time Frame:** Today, Yesterday, Previous 24 hours, Previous 7 days, Week-to-date, Month-to-date, Quarter-to-date, Year-to-date, Last Week, Last Month, Last Quarter, or Custom

Each data point on a line indicates the end of a unit. Click on a data point to go to the next page to see the Time and the Number of Incidents.



Trends by Resources

You can filter the following:

- **Resource Name:** Select up to five resource names from the drop-down list.
- **Chart Metrics:** Number of incidents,TTR Respond (Average), TTR Respond (Maximum), or TTR (Median).
- **Time Frame:** Today, Yesterday, Previous 24 hours, Previous 7 days, Week-to-date, Month-to-date, Quarter-to-date, Year-to-date, Last Week, Last Month, Last Quarter, or Custom

Each data point on a line indicates the end of a unit. Click on a data point to go to the next page to see the Time and the Number of Incidents.

Last 24-Hour Notifications

The bottom of the Open Incidents sub-tab shows the **Last 24-Hour Notifications**. You can click the elements on the table to reorder the selected column data.

LAST 24 HOUR NOTIFICATIONS

Notification Name	Incident Name	Priority	Affected Services	Sent On ▾	Sent By
IT Outage	**IT Outage**	Medium		Apr 27, 2023 10:37:37 PDT	
IT Outage	**IT Outage**	Low		Apr 27, 2023 10:36:45 PDT	
IT Outage	**IT Outage**	High		Apr 27, 2023 10:35:58 PDT	
IT Outage	**IT Outage**	Critical		Apr 27, 2023 10:07:33 PDT	
IT Outage	**IT Outage**	Medium		Apr 27, 2023 10:03:02 PDT	
IT Outage	**IT Outage**	Low		Apr 27, 2023 09:56:11 PDT	
IT Outage	**IT Outage**	Medium		Apr 27, 2023 09:55:10 PDT	
IT Outage	**IT Outage**	High		Apr 27, 2023 09:49:47 PDT	
IT Outage	**IT Outage**	Unknown		Apr 27, 2023 09:24:13 PDT	
IT Outage	**IT Outage**	Unknown		Apr 26, 2023 17:07:58 PDT	
IT Outage	**IT Outage**	Unknown		Apr 26, 2023 17:06:19 PDT	
IT Outage	**IT Outage**	Unknown		Apr 26, 2023 17:02:30 PDT	
IT Outage	**IT Outage**	Unknown		Apr 26, 2023 16:36:44 PDT	
IT Outage	**IT Outage**	Unknown		Apr 26, 2023 16:21:19 PDT	

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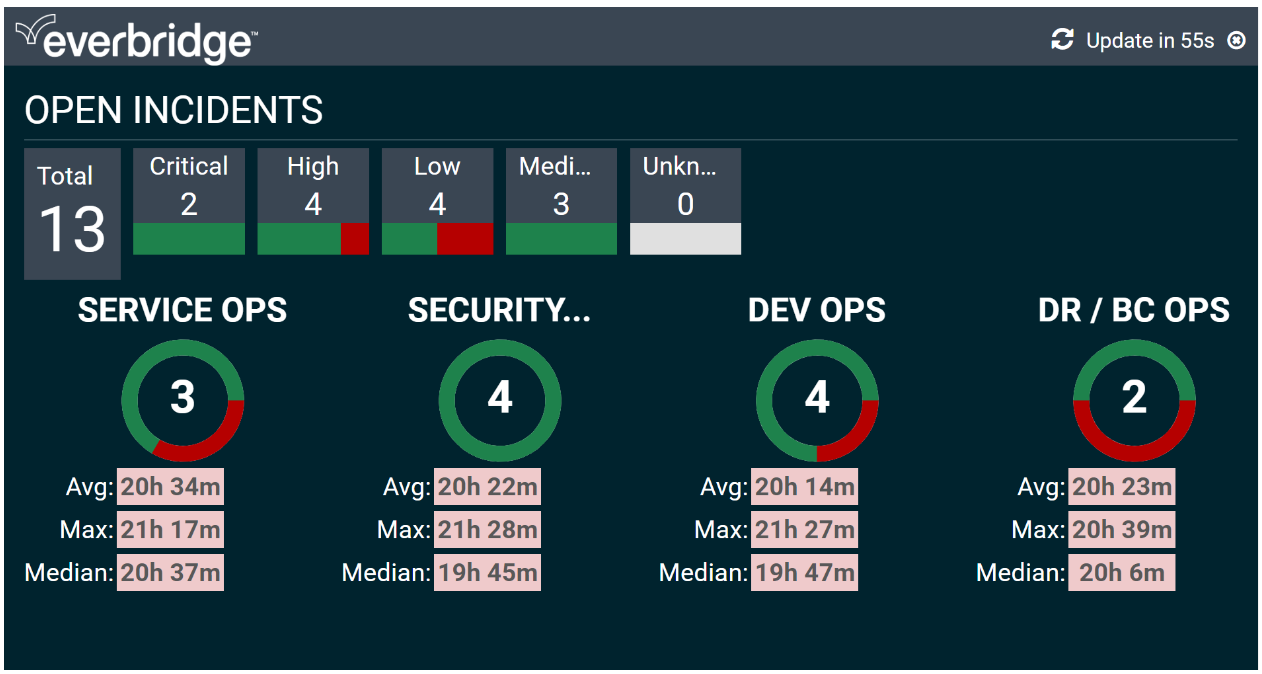
Operations Center View

Click **Operations Center View** to see the Open Incidents in a display-only view. Every 30 seconds the view flips between the Open Incidents and the Trends. If needed, scroll to see everything in Open Incidents or Trends.

> **NOTE:** Unlike the Open Incidents sub-tab, you can only view the processes, their open Incidents, and Trends. Although identical to the Open Incidents sub-tab, you cannot modify this view.



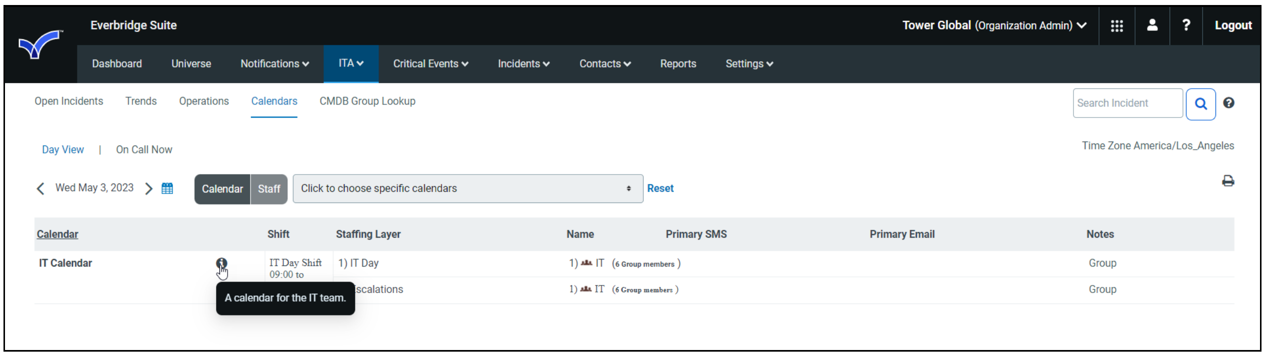
Trends


everbridge
Update in 19s
TRENDS
Incident Type: Newly Created
Chart Metrics: Number Of Incidents
Time Frame: Previous 7 Days
8
6
4
2
0
4/28
4/29
4/30
5/1
5/2
5/3
Now
Service Ops
Security Ops
Dev Ops
DR / BC Ops

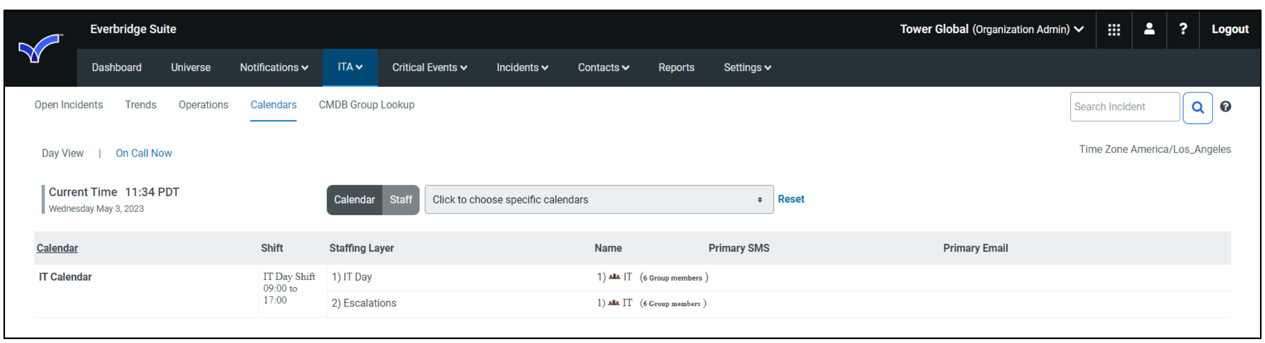
Calendars

If your Organization has **Scheduling**, you can see a display-only view of Day View or On-Call Now once these options have been enabled in **Settings** > **Organization** > **ITA** > **Settings.** If a calendar was given a description, it can be read by hovering the mouse over the **Information** icon.

Day View



On-Call Now



CMDB Group Lookup

You can display a read-only view of the CMDB Group Lookup table. This mapping is configured in **Settings** > **Contacts and Groups** > **CMDB Group Lookup**. You can scroll to see all the properties.

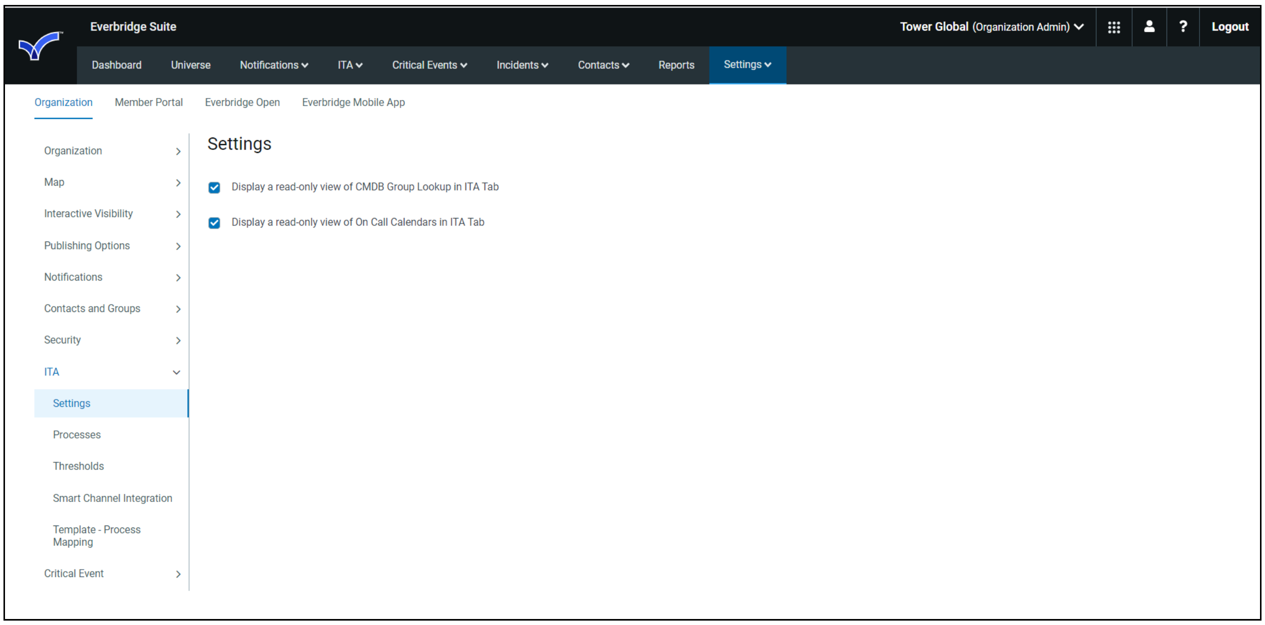
Smart Orchestration

You can display the Overview of the Smart Orchestration dashboard. This mapping is configured in **Settings** > **ITA** > **Settings**.

See the Smart Orchestration Cockpit User Guide for details about the Overview dashboard.

Settings

If your organization has ITA, you can select to display read-only views of **Scheduling** (Day View and On Call Now) and/or the **CMDB Group Lookup mapping** in the **ITA** tab.

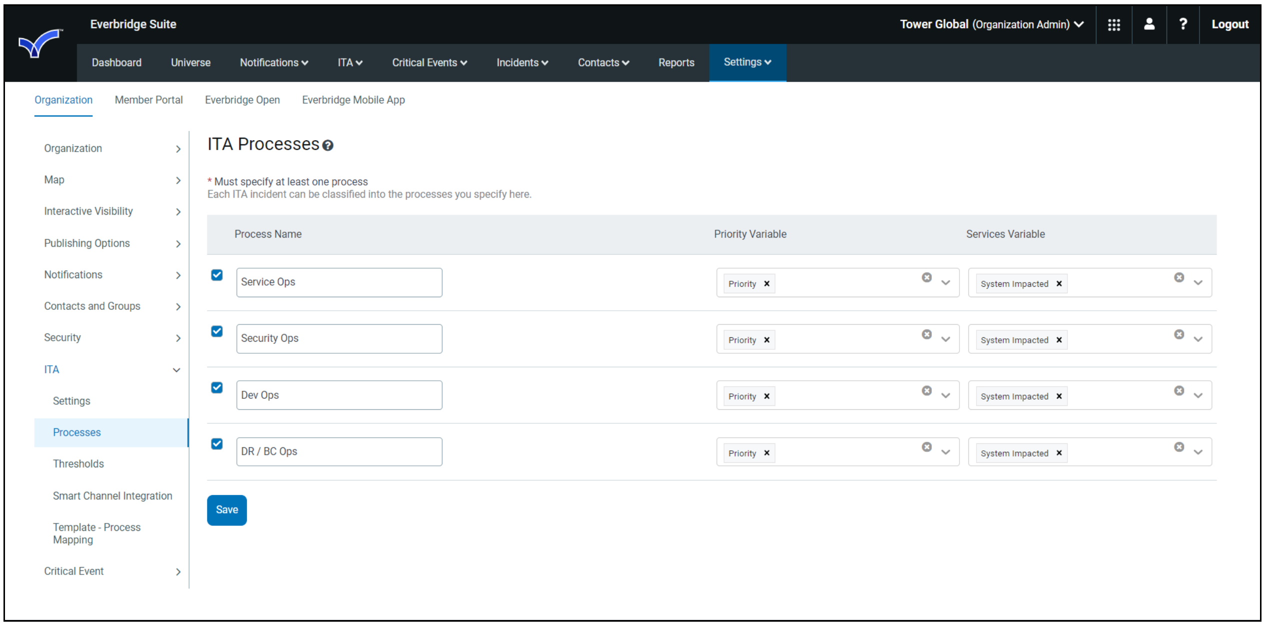


If applicable, you can also select to display the Smart Orchestration view in the **ITA** tab. Selecting this option allows authorized users (Incident Operators and Incident Administrators with proper Smart Orchestration permissions) to access the Smart Orchestration dashboards in a separate tab in the ITA dashboards.

From the ITA dashboards, you can access the workflows in the **Smart Orchestration Overview**, as well as more detailed monitoring.

ITA Processes

Each ITA Incident can be classified into the processes and variables you specify here.

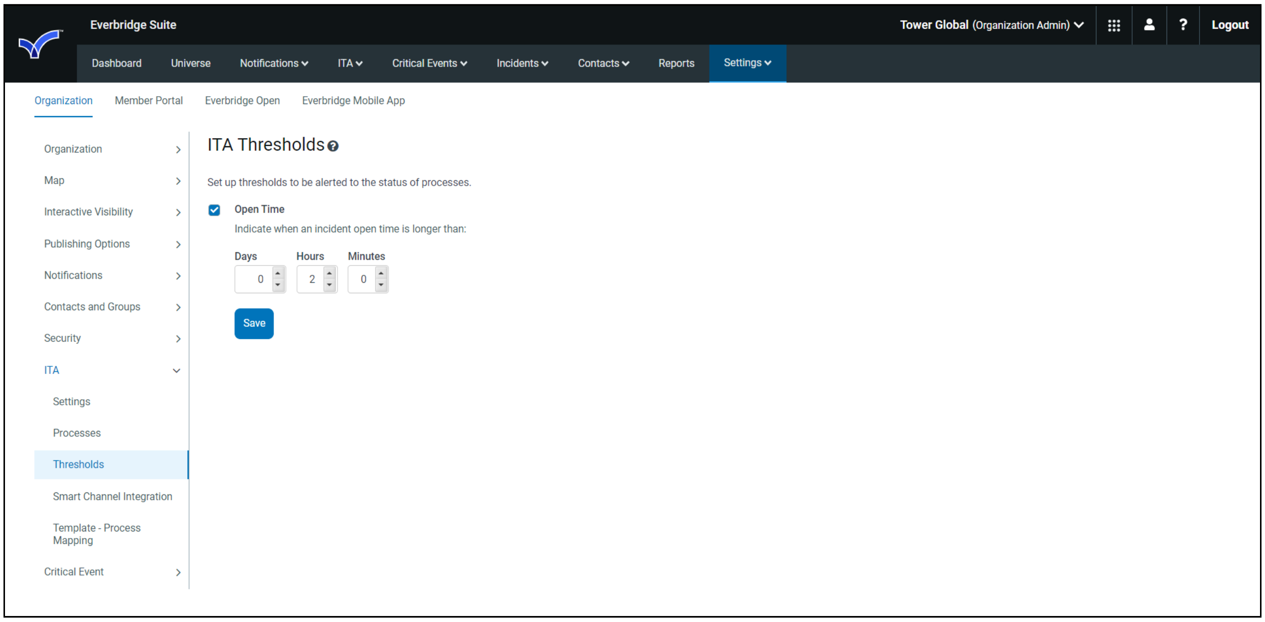


To configure your ITA processes:

1. Select the checkbox of 1-4 processes to display on the ITA Dashboard.
2. Optionally, change the process names.
3. Change the Priority Variable and Services Variable names.
    - Click the Down Arrow to view the list of all Incident variables in the Organization. Then select the variables you want used as your Priority or Services variables.
    - Click the "x" next to the Down Arrow to clear all the variables.
    - Select the "x" next to a variable name to remove just that variable.
4. Click **Save**.

ITA Thresholds

Set up thresholds to be alerted to the status of processes. When an incident has been open longer than the threshold you set, the ITA Dashboard displays the Open Time with a red background.



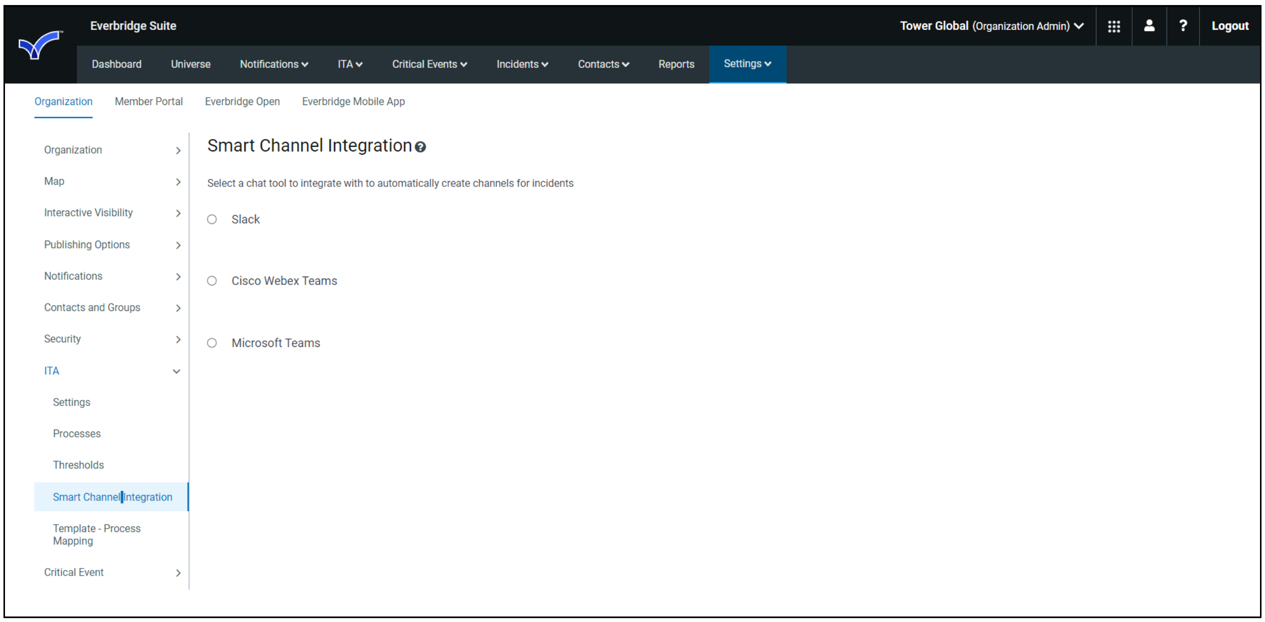
To set up ITA thresholds:

1. Select the **Open Time** checkbox.
2. Set the Days, Hours, and Minutes of your threshold.
    - Maximum Days: 99
    - Maximum Hours: 23
    - Maximum Minutes: 59

Smart Channel Integration

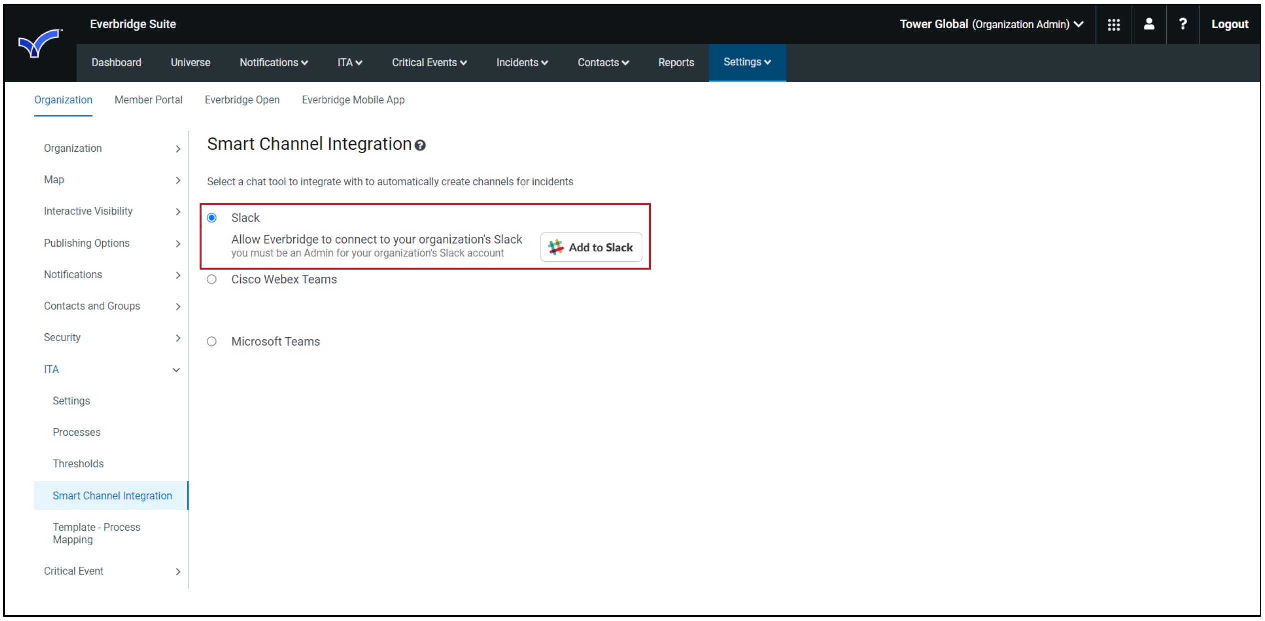
Administrators can integrate with a chat tool to automatically create and associate a channel for a specific Incident. The chat tools are as follows:

- Slack
- Cisco Webex Teams
- Microsoft Teams



Slack Integration

Administrators can connect Everbridge with Slack to automatically create and associate a channel for a specific Incident. Then, from the Operations sub-tab, you can see Slack Activities in Incident Details.



To connect Everbridge with Slack:

1. Click the radio button: **Slack**.
2. Click **Add to Slack**.
3. Type your team's Slack URL and click **Continue**.
4. Follow the on-screen instructions to access the Slack account and confirm/ authorize your identity.

From **Settings** > **ITA** > **Smart Channel Integration** > **Slack**, you will see the Slack account to which you are connected. You can create and join Slack channels for Incidents from the Operations or Incident Details page.

To create, view, and archive a Slack channel for a specific ITA Incident:

A channel can be created manually for an Incident from the Operation sub-tab or the Incident detail in the ITA dashboard:

1. Navigate to the **ITA dashboard** > **Operations table.**
2. From the Channel column, select **Create.**

   You are asked to authenticate to Slack.

   - A channel named *inc-<last 6 digits of the Incident number>* is automatically created and is linked to the Incident.
   - You can later navigate to the channel from the Operations table by selecting the Go To link in the Channel column. Alternatively, you can navigate to the detail page of the Incident where the channel details (name and URL) are indicated. (If no channel exists, a create action will be available.)

- All channel activity will be available to view from the Incident Detail page under the Activities tab. You can refresh the view by selecting **Load More**. If any attachments have been added to the channel, they can be downloaded from the Activities tab.

Upon closing of the Incident, the channel will automatically be archived.

To fetch the On-Call Now information using the Everbridge-Slack integration:

1. After connecting Everbridge with Slack, type **/eboncallnow**.

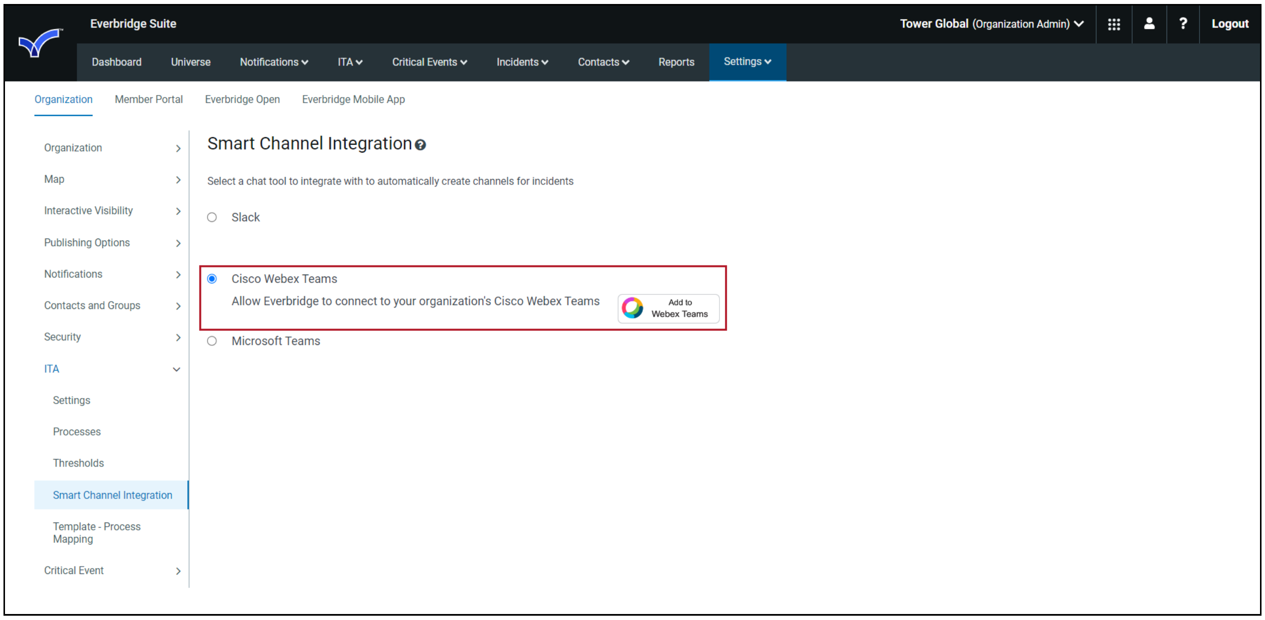
   If you have more than one calendar, the system returns the calendar list (maximum 100).
2. If you have more than 100 calendars, and if one is not found in the list, you can type

   /eboncallnow ***calendarname***

> **NOTE:** If you have already set up the smart channel integration between Everbridge and Slack, you might need to revoke the original configuration and re-do the new integration so that a new authentication token is secured.

Cisco Webex Integration

Administrators can connect Everbridge with **Cisco Webex Teams** to automatically create and associate a team for a specific Incident. Then, from the Operations sub-tab, you can see Webex team activities in Incident Details.



To connect Everbridge with Cisco Webex Teams:

1. Click the radio button: **Cisco Webex Teams**.
2. Click **Add to Webex Teams**.
3. Type your email address and click **Next**.
4. Type your password and click **Sign In**.
5. Follow the on-screen instructions to access the Spark account and confirm/ authorize your identity.
6. From **Settings** > **ITA** > **Smart Channel Integration** > **Cisco Webex Teams**, you will see the Webex Teams account to which you are connected. You can create and join Webex channels for Incidents from the Operations or Incident Details page.
7. Select the Space in which you want your channels to be created by default. You can later select a different Space upon creation of the team from the ITA dashboard.

To create, view, and archive a Webex Team for a specific ITA Incident:

A team can be created manually for an Incident from the Operations sub-tab or the Incident detail in the ITA dashboard.

1. Navigate to the **ITA dashboard** > **Operations** table.
2. In the Channel column, select **Create**.

   You are asked to authenticate to Webex.

   - A channel named *<Incident name><Incident ID>* is automatically created and is linked to the Incident.
   - You can later navigate to the team from the Operations table by selecting the Go To link in the Channel column. Alternatively, you can

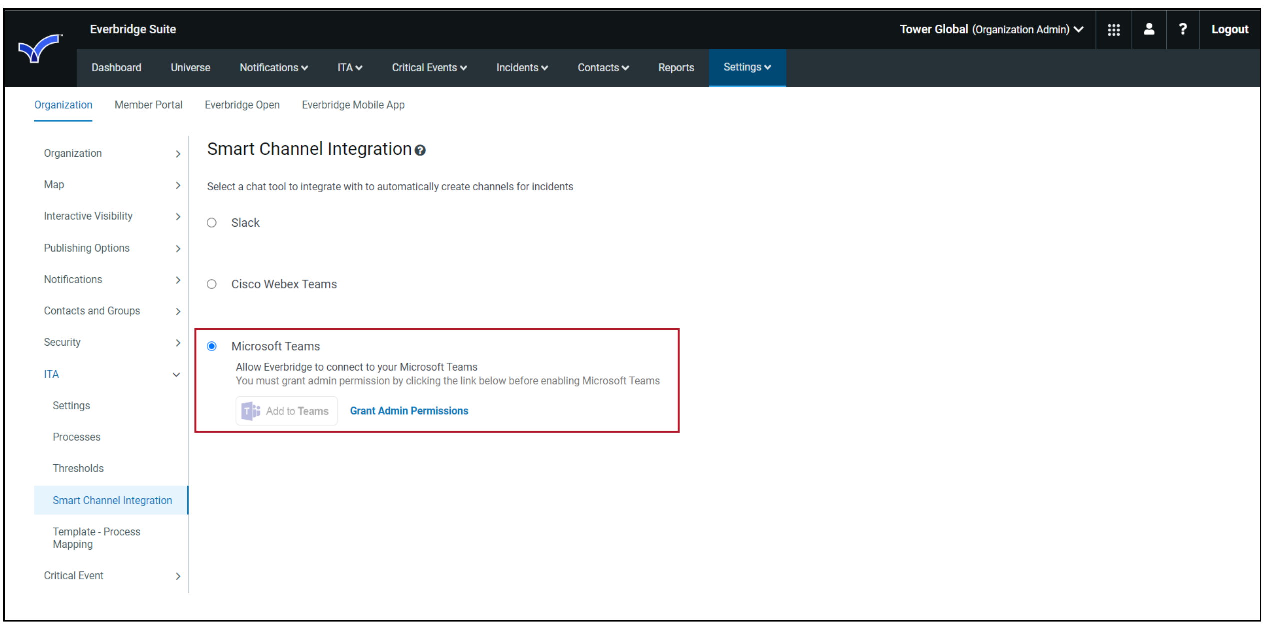
navigate to the detail page of the Incident where the team details (name and URL) are indicated. (If no team exists, a create action will be available.)

- All team activity will be available to view from the Incident Detail page under the Activities tab. You can refresh the view by selecting **Load More**. If any attachments have been added to the team, they can be downloaded from the Activities tab.

Upon closing of the Incident, the team will automatically be archived in Webex.

Microsoft Teams Integration

Administrators can connect Everbridge with Microsoft Teams to create either a specific Team or a specific Channel in an existing team for a specific Incident. Then, from the Operations sub-tab, you can see MS Team activities in Incident Details.



Follow the on-screen instructions to connect Everbridge with Microsoft Teams.

To connect Everbridge with Microsoft Teams:

1. Click the radio button: **Microsoft Teams.**
2. Click **Authorize Admin Consent**.
3. Ask the Global Administrator of your Microsoft Azure Active Directory Tenant to sign in with his or her Microsoft credentials and authorize admin consent to grant the permissions required by the Everbridge integration app.

4. Click the **Add to Teams** button.
5. Once authorized by the Azure AD Global Administrator, any user in your Azure AD Tenant can log in to the Everbridge Manager Portal and set up the integration by clicking the Add to Teams button and signing in with their Microsoft credentials.
6. From **Settings** > **ITA** > **Smart Channel Integration** > **Microsoft Teams**, you will see the Microsoft account to which you are connected.
7. Select the default creation option for your channel. You can either create a Team with a general channel or a Channel in an existing team for a specific Incident. If you select to create a Channel in a specific team, you can select the default team in which the channels will be created. You can later select a different option upon the creation of the team from the ITA dashboard.

To create, view, and archive a Microsoft Teams Channel for a specific ITA Incident:

A channel can be created manually for an Incident from the Operations sub-tab or the Incident detail in the ITA dashboard.

1. Navigate to the **ITA dashboard** > **Operations** table.
2. In the Channel column, select **Create**.
3. You are asked to authenticate to Microsoft Teams. Depending on the option chosen during the creation of the channel, the following happens:
    - If you selected to create a team and a channel for your Incident, a team named *INC-<Incident ID>* is automatically created. It will include a general channel that will be linked to the Incident.
    - If you selected to create a channel within an existing team, a channel named *INC-<Incident ID>* is automatically created and linked to the Incident.
    - If you selected to create a channel using an existing team, a channel named *INC-<Incident ID>* is automatically created and linked to the Incident.
    - You can later navigate to the channel from the Operations table by selecting the Go To link in the Channel column. Alternatively, you can navigate to the detail page of the Incident where the channel details (name and URL) are indicated. (If no team exists, a create action will be available.)
    - All channel activity will be available to view from the Incident Detail page under the Activities tab. You can refresh the view by selecting **Load More**. If any attachments have been added to the channel, they can be downloaded from the **Activities** tab.

Upon closing of the Incident, the occurs:

- If you selected to create a team and a channel for your Incident, the team will be renamed to *RES-<IncidentID>* and archived.

- If you selected to create a channel in a specific team for your Incident, the channel will be renamed *RES-<Incident ID>*. Note, however, the team will not be archived.

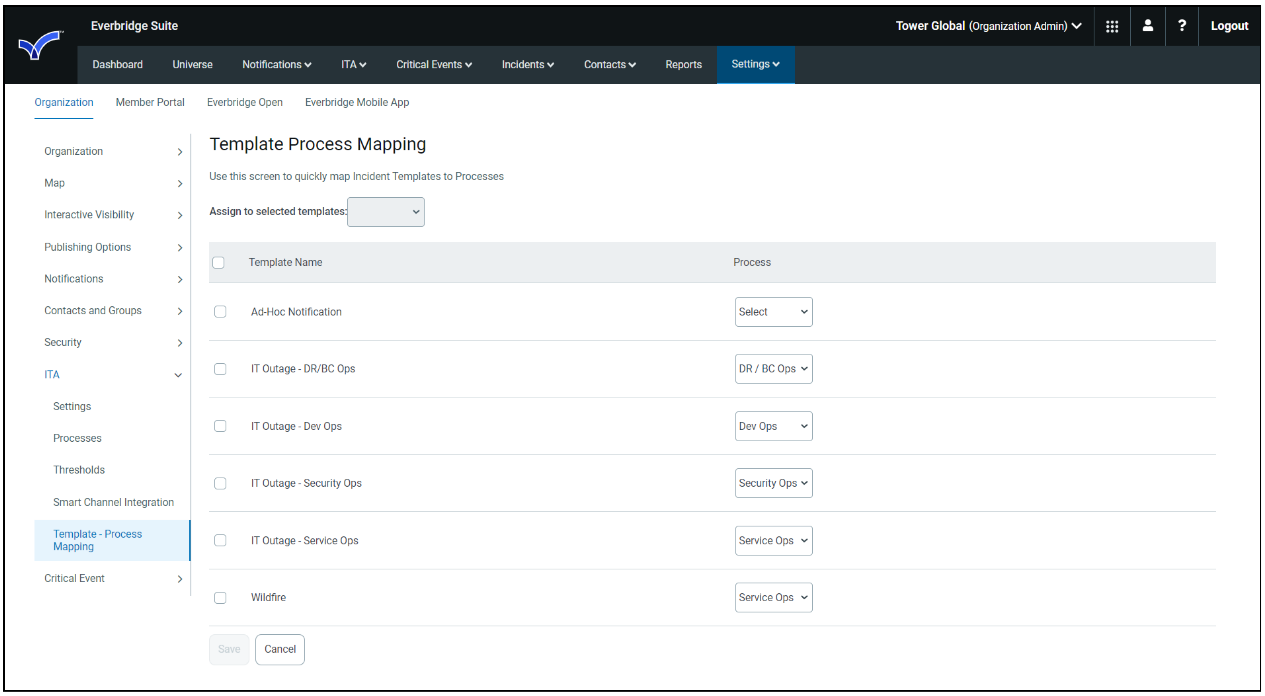
Template - Process Mapping

Use this page to quickly map existing Incident Templates to Processes.

There are two ways you can map the Incident Templates to Processes:

- Select the checkbox(es) of the templates, then select a process from the **Assign to selected templates** drop-down list. Select one of the processes.
- From the Process drop-down list, select a process next to the desired individual template.

Finally, click **Save**.



ITA Operations

From the ITA Dashboard, there are various ways to access the Operations view:

- Click the **Operations** sub-tab
- Click a number in a **Priority Box**
- Click a number in one of the **process charts**

NOTE: To refresh the Operations view, click a different tab, then click the ITA tab to restart from the ITA Dashboard. You can also refresh the Operations view by refreshing the browser.

Incidents View

From the Operations view (Incidents), you can:

- See the number of Incidents in each process
- Reorder the underlined column headings (see To reorder elements in a column)
- Filter your Incidents (see To change the filters on your Incidents or resources)
- Click an Incident name to see its Incident details (see Incident Details)
- Click the number in the Notifications column to see notification details (see Notification Details)
- If available under the Slack column, click one of the following:
    - Go to — to see the Incident in the Slack channel
    - Create — to create the Incident in the Slack channel

Resources View

From the Operations view (Resources), you can:

- See the number of Incidents in each process
- Reorder the underlined column headings
- Filter your resources
- Click the Chart icon to see chart metrics for a resource

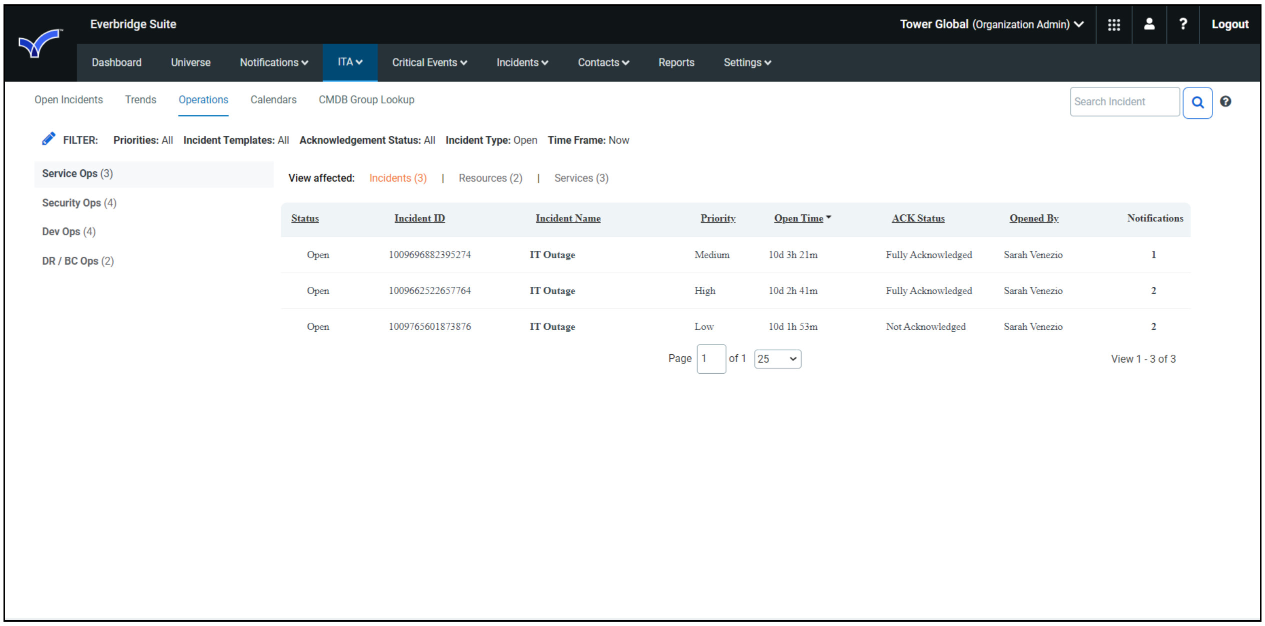
Services View

From the Operations view (Services), you can:

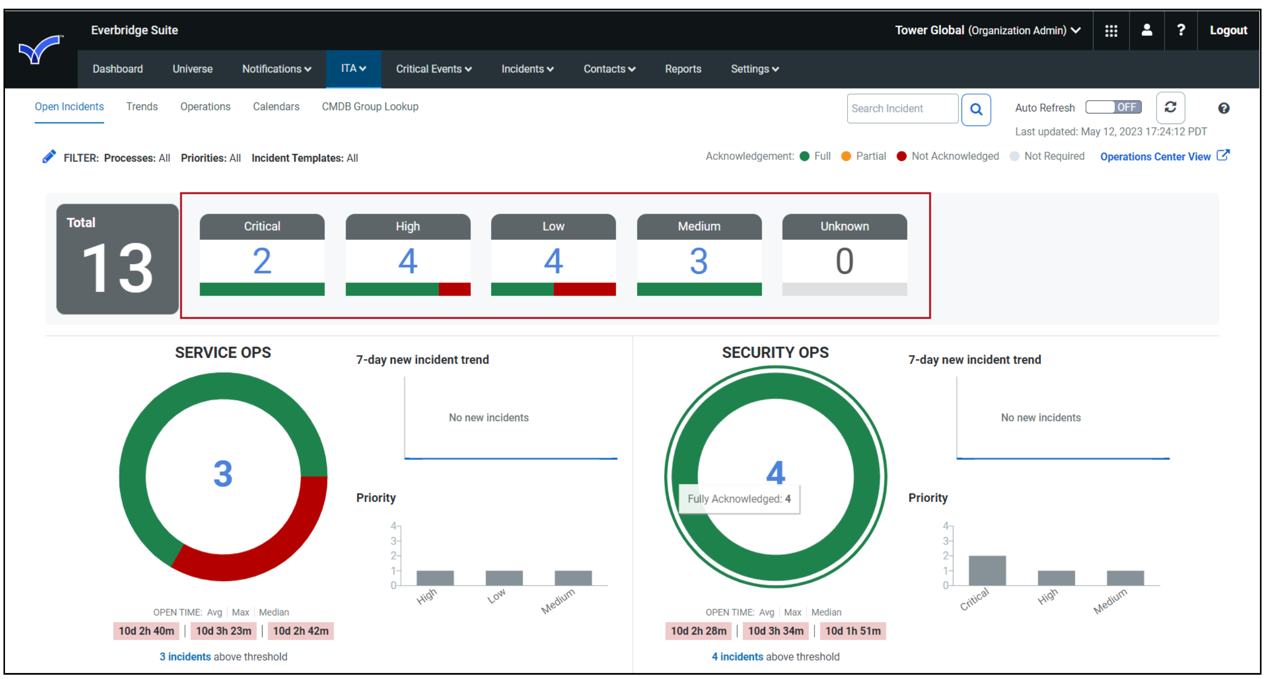
- Filter your services
- See the number of Incidents in each process
- Reorder the underlined column heading

Operations: Incidents

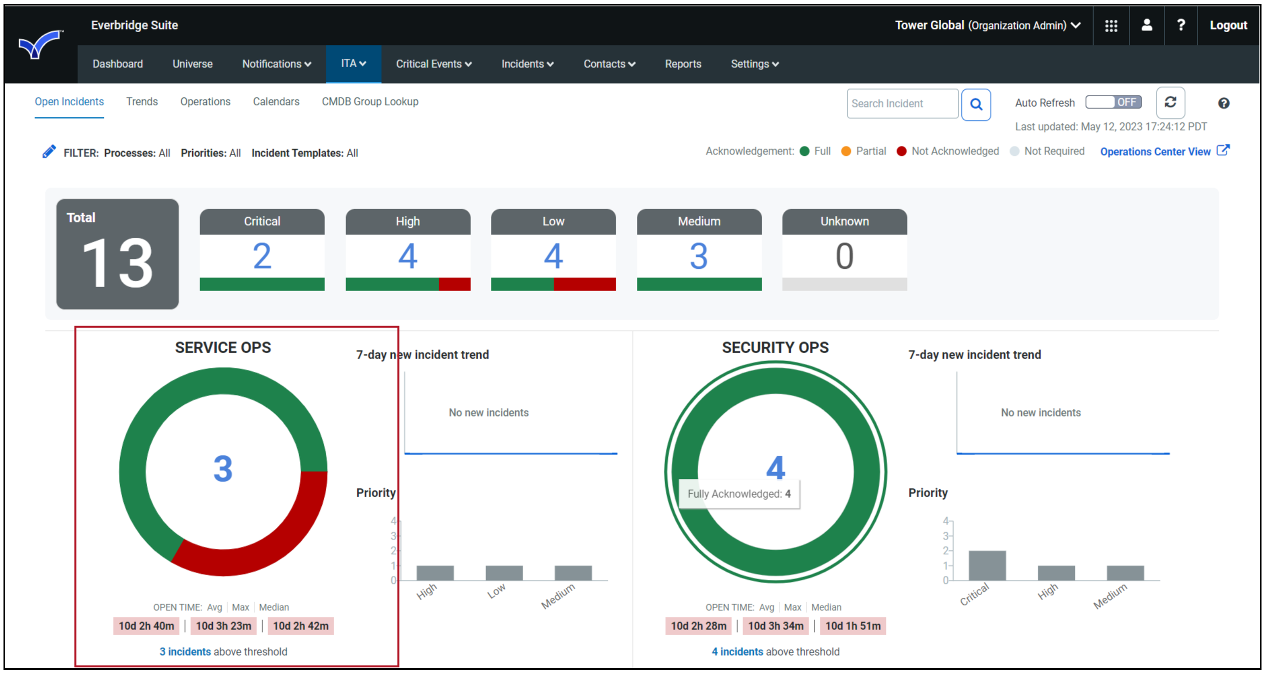
From the ITA Dashboard, click the **Operations** sub-tab.



Likewise, clicking a number in a Priority Box shows you only that priority.



Clicking a number in a donut chart also shows you the operations view for that process.



Reordering elements in the columns

You can reorder the elements in any column whose column heading is underlined. This applies to both Operations view: Incidents and Resources.

To reorder elements in a column:

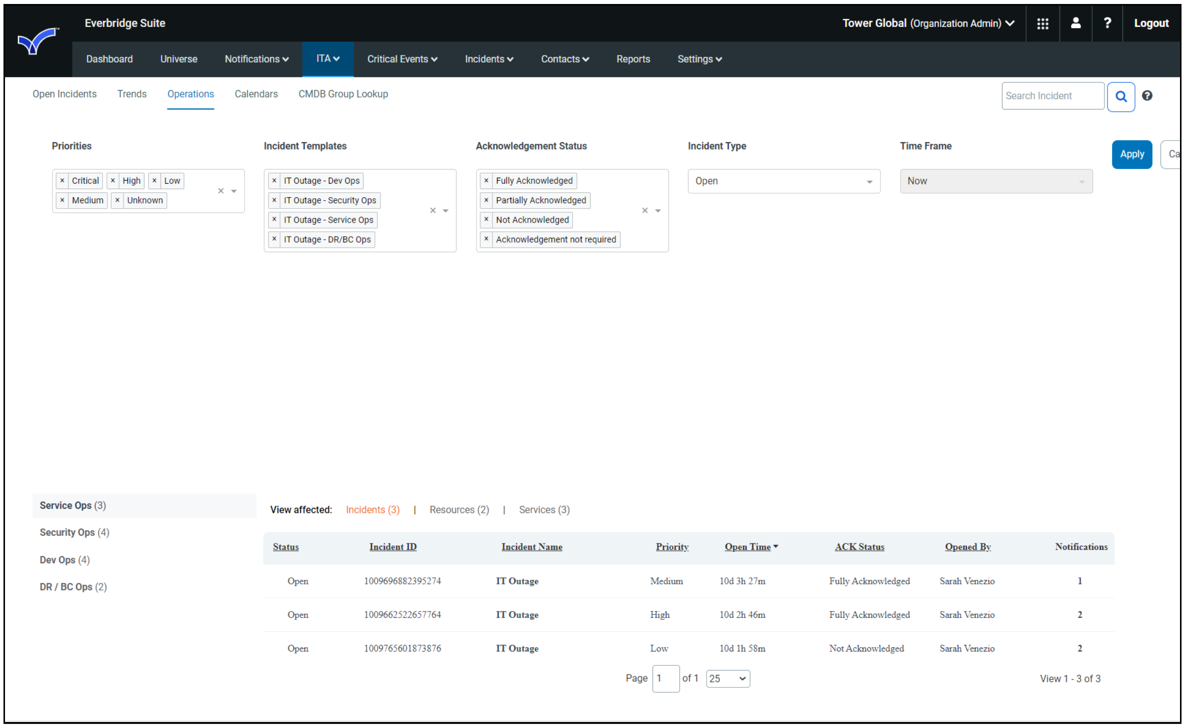
1. From the Operations sub-tab, click an underlined column heading.
2. Review the following information regarding each column heading in Operations view (Incidents):
   - **Status**—Lists the Incidents by status (Open).
   - **Incident ID**—Lists the Incidents by numerical Incident ID.
   - **Incident Name**—Lists the Incidents by alphabetic Incident name.
   - **Priority**—Lists the priorities by “P”, High-Medium-Low, Unknown, then lowercase priorities.
   - **Open Time**—Lists the Incidents by time (least amount to most amount).
   - **ACK Status**—Lists the Incidents by Acknowledgment status (None, Acknowledged, Partial, Not Acknowledged, and “-”.
   - **Opened By**—Lists the Incidents alphabetically by the person’s first name, or “-”.
3. Click the Up/Down arrow next to the column heading to reverse the order.

Filtering Your Incidents or Resources in Operations View

You can change the filters as often as you want.

To change the filters on your Incidents or resources:

1. From the Operations sub-tab, click the **Pencil** icon next to FILTER.



2. Add a priority, Incident template, acknowledgment status, Incident type, and/or time frame by clicking the down arrow at the center right-hand side of the desired pane, and click the desired priority.
3. Clear individual elements by clicking the X, or click the X on the center right-hand side of the pane to clear all at one time.
4. When done, click **Apply**. There are three views from which to see the Operations: Incidents, Resources, and Services. Incidents is displayed by default.
5. Click **Resources** to see the Resources view. For details, see Operations: Resources.
6. Click **Services** to see the Services view.

   For details, see Operations: Services.

Incident Details

When you are in Operations view, you can select an Incident name to see its Incident details.

Be sure you have the desired filters, then select the process and click the Incident Name of the Incident that you want to see its Incident details. In Incident Details, you can see the Timeline or the Activities.

Activities

If there are Slack Channel details, you can see them in the Activities. Likewise, if there are Cisco Spark details, you can see them in the Activities after you sign in.

Notification Details

From the Operations view, you can see Notification details of an Incident.

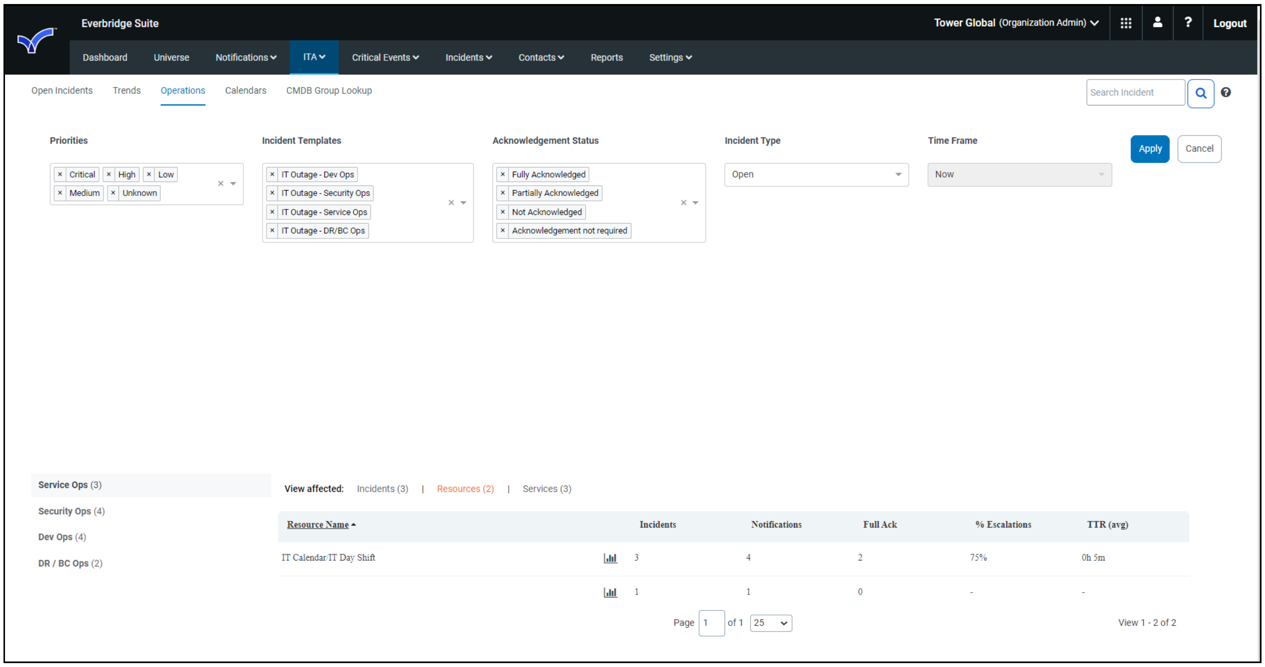
To see Notification details of an Incident:

1. From the Operations view, locate the Incident that you want to see its Notification details. In the Notifications column, if there is a number, you can see the details.
2. Click the number in the Notifications column. The Notification details appear under the selected Incident.
3. Optionally, reorder any of the following underlined column headings:
    - Notification Title
    - Priority
    - Notified Resources
    - Affected Services
    - ACK Status
    - ACK By
    - Sent On

Operations: Resources

From the Operations view (Resources), you can:

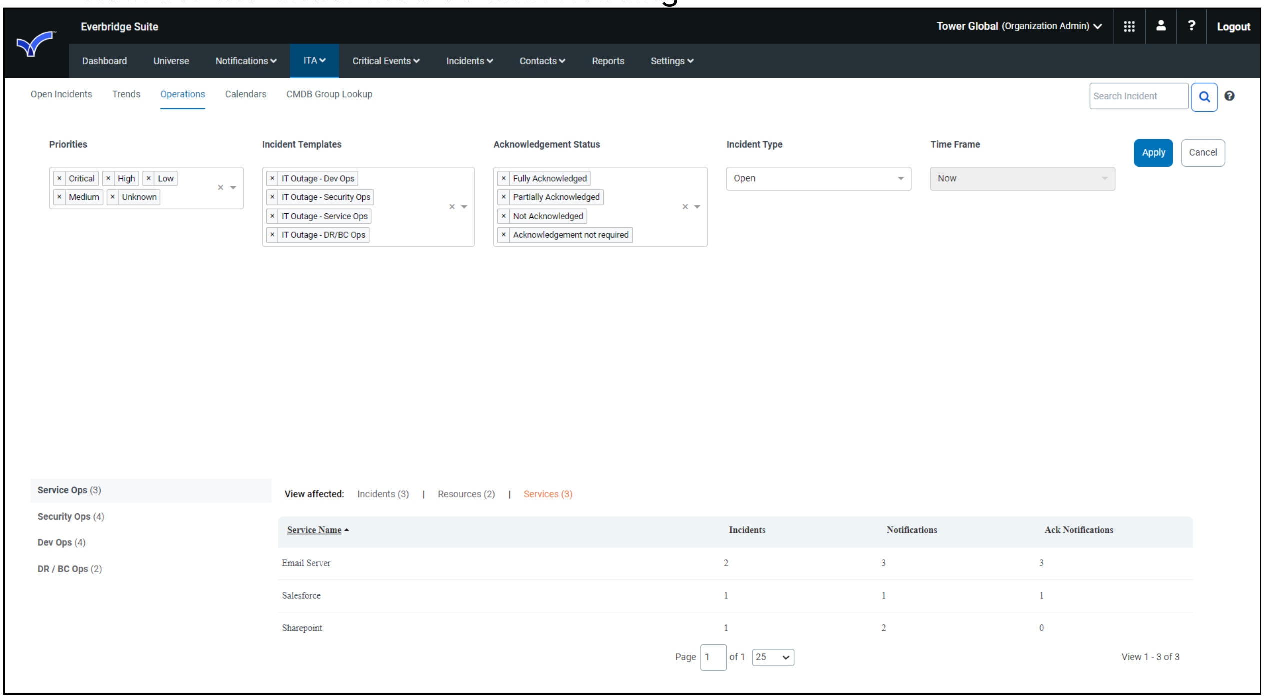
- Filter your resources
- See the number of Incidents in each process
- Reorder the underlined column heading
- Click the **Chart** icon to see chart metrics for a resource



Operations: Services

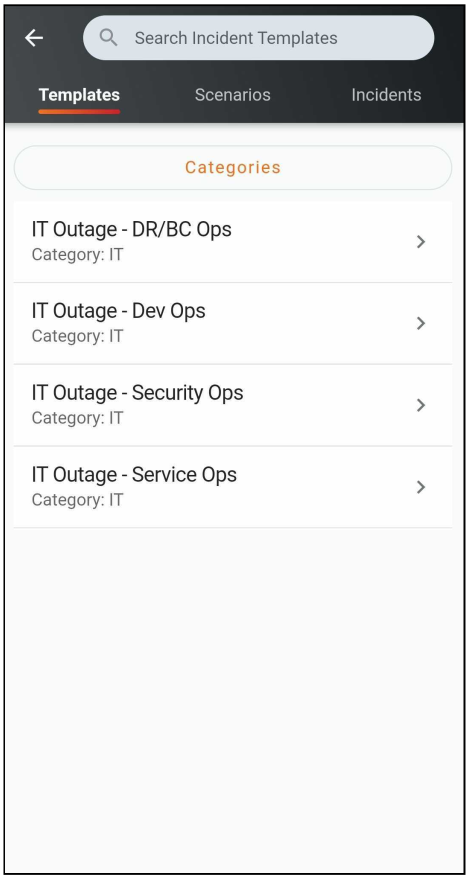
From the Operations view (Services), you can:

- Filter your services
- See the number of Incidents in each process
- Reorder the underlined column heading



Integration with ManageBridge

Launch ManageBridge when you need to launch an IT Incident Template while on the go.

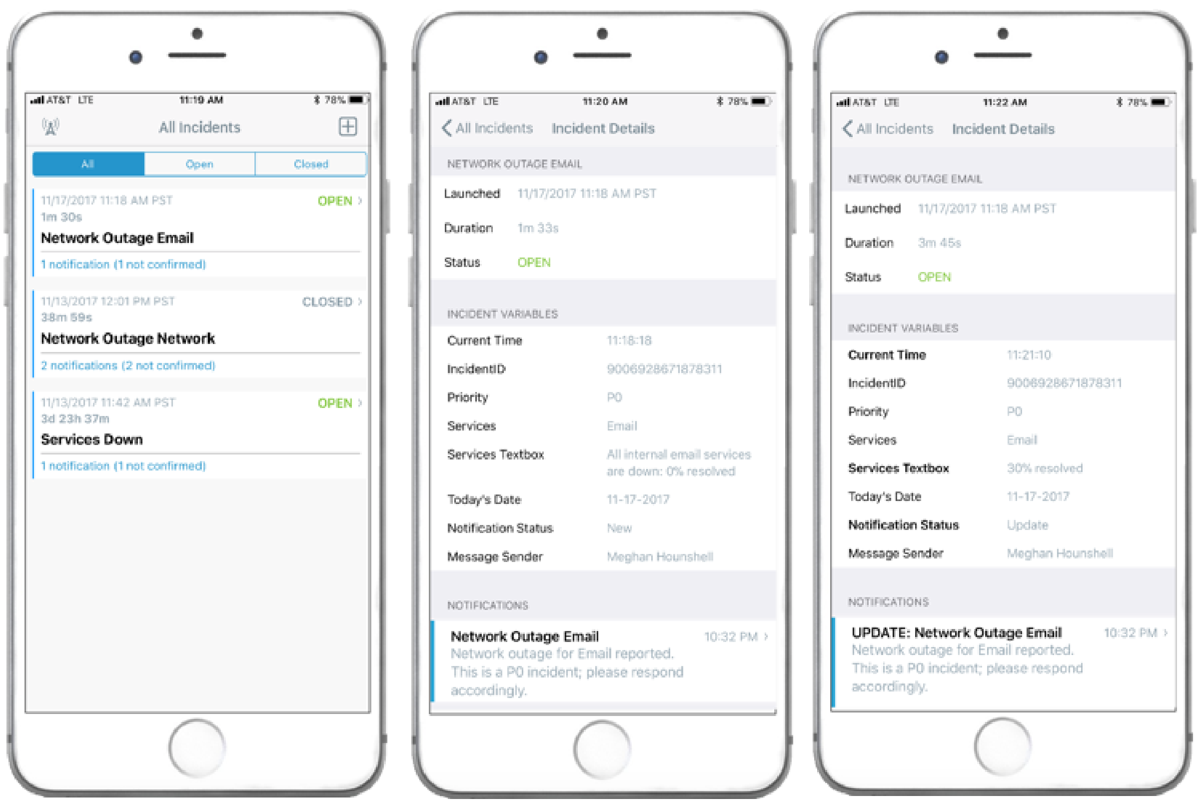


Virtual Incident Rooms

Enable your resolvers and responders to view the most updated and relevant information for a single incident in one place:

- Group all notifications for the same Incident together.
- View basic metadata like Incident status and duration.
- Find the most recent values for Incident variables front and center in the room.

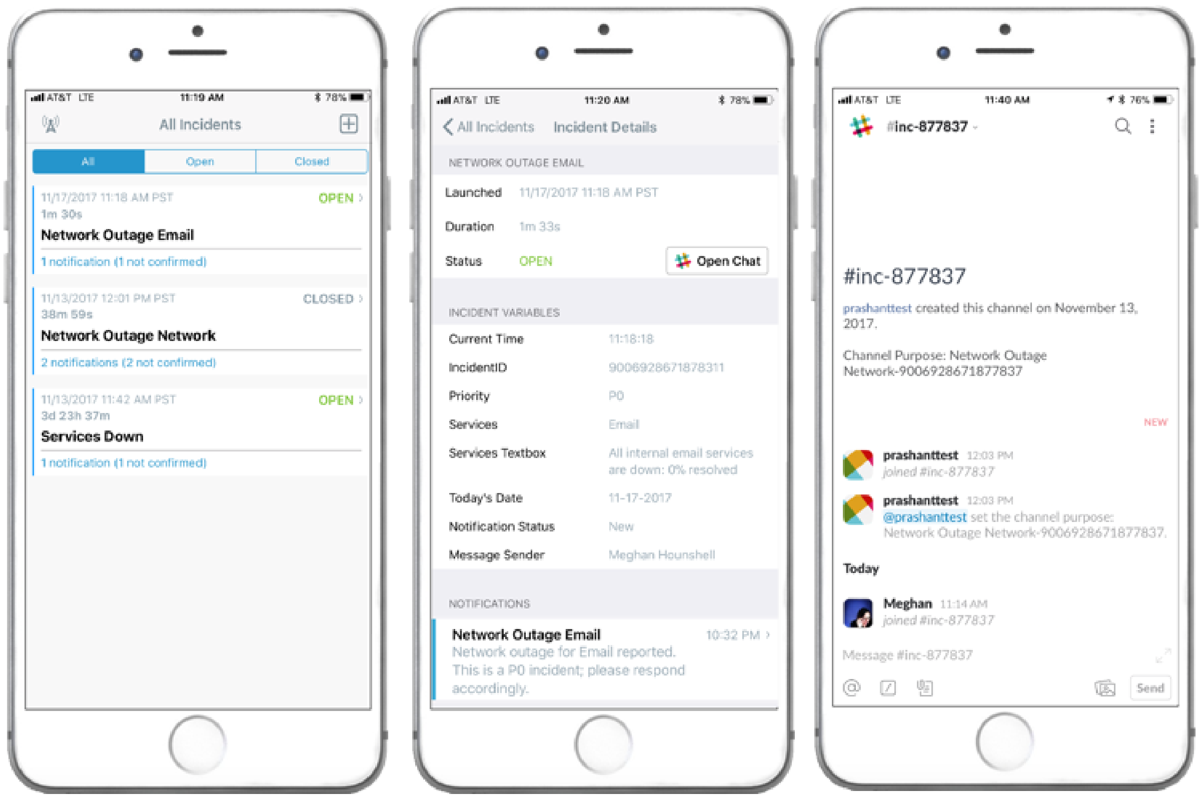
Jump from the Incident room into the Slack channel for that Incident (see more details Integration with Slack).



By default, this feature is OFF. To enable this feature, an authorized Administrator can select the **Group Notifications by Incidents** flag in their Organization Settings.

Integration with Slack

IT Alerting users can jump into that incident's Slack channel from the Everbridge Mobile App's virtual incident room if a Slack channel has been enabled for an Incident.



IT Alerting Process Counters

Display your virtual incident rooms aggregated by IT Alerting process. Incident Notification recipients will see the incidents and processes for which they have been notified, and can easily navigate between different processes.