



# Smart Orchestration Cockpit User Guide

Everbridge Suite

November 15, 2021



Smart Orchestration Cockpit User Guide  
Everbridge Suite  
November 15, 2021  
Printed in the USA.

Copyright © 2021. Everbridge, Inc. All rights are reserved. Everbridge, Nixle, IT Alerting, Community Engagement, HipaaBridge, SecureBridge, Smart Orchestration, and Visual Command Center are trademarks of Everbridge, Inc. All other registered or unregistered trademarks and service marks are property of their respective companies and should be treated as such.

No part of this publication may be reproduced, transcribed, or transmitted, in any form or by any means, and may not be translated into any language without the express written permission of Everbridge.

***Limit of Liability/Disclaimer of Warranty:*** Everbridge makes no representations or warranties of any kind with respect to this manual and the contents hereof and specifically disclaims any warranties, either expressed or implied, including merchantability or fitness for any particular purpose. In no event shall Everbridge or its subsidiaries be held liable for errors contained herein or any damages whatsoever in connection with or arising from the use of the product, the accompanying manual, or any related materials. Further, Everbridge reserves the right to change both this publication and the software programs to which it relates and to make changes from time to time to the content hereof with no obligation to notify any person or organization of such revision or changes.

This document and all Everbridge technical publications and computer programs contain the proprietary confidential information of Everbridge and their possession and use are subject to the confidentiality and other restrictions set forth in the license agreement entered into between Everbridge and its licensees. No title or ownership of Everbridge software is transferred, and any use of the product and its related materials beyond the terms on the applicable license, without the express written authorization of Everbridge, is prohibited.

*If you are not an Everbridge licensee and the intended recipient of this document, please return to Everbridge, Inc., 155 N. Lake Avenue, Pasadena, CA 91101.*

***Export Restrictions:*** The recipient agrees to comply in all respects with any governmental laws, orders, other restrictions ("Export Restrictions") on the export or re-export of the software or related documentation imposed by the government of the United States and the country in which the authorized unit is located. The recipient shall not commit any act of omission that will result in a breach of any such export restrictions.

Everbridge, Inc.  
155 N. Lake Avenue, 9th Floor  
Pasadena, California 91101 USA  
Toll-Free (USA/Canada) +1.888.366.4911

Visit us at [www.everbridge.com](http://www.everbridge.com)

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.

# C O N T E N T S

<b>About This Guide</b> .....	<b>v</b>
Introduction .....	vi
Intended Audience .....	vi
Using Everbridge Suite Documentation .....	vii
Contents of This Guide .....	vii
Conventions .....	vii
Related Documentation .....	viii
Document Control Information .....	ix
Document Change History .....	ix
<b>Chapter 1 — Introduction</b> .....	<b>1</b>
Overview .....	2
Granting Access to Users .....	3
<b>Chapter 2 — Accessing Smart Orchestration</b> .....	<b>5</b>
Accessing Smart Orchestration .....	6
Monitoring Workflows .....	8
Advanced Troubleshooting .....	10
Advanced Search .....	10
Log Viewer .....	12
Viewing and Designing Workflows .....	14
Using the Package Manager .....	16



**Chapter 3 — Enabling Smart Orchestration in ITA . . . . . 19**  
    Enabling Smart Orchestration in ITA . . . . . 20

**Chapter 4 — Interacting with Everbridge Suite . . . . . 23**  
    Sending Events to Everbridge Suite . . . . . 24  
    iPaaS . . . . . 25  
        iPaaS Configuration. . . . . 25  
        Smart Orchestration Configuration for iPaaS . . . . . 25  
    Everbridge Suite REST API. . . . . 29  
        REST API User Configuration. . . . . 29

# P R E F A C E

## About This Guide

The following topics are covered:

- ◇ *Introduction*
- ◇ *Using Everbridge Suite Documentation*
- ◇ *Document Control Information*



# Introduction

*Smart Orchestration Cockpit* is a workflow automation engine that enables users to build or customize workflows to automate and monitor business processes through a graphical user interface.

The following sections provide information on how to use this guide, and outline any related Everbridge Suite publications.

## Intended Audience

This guide is intended for technical users responsible for configuring and customizing workflow automation, including system integration engineers and solution architects.



# Using Everbridge Suite Documentation

This section:

- ◇ Outlines the structure and contents of this guide
- ◇ Provides a list of conventions used in the Everbridge Suite documentation set
- ◇ Identifies other related documentation

## Contents of This Guide

This guide contains the following chapters and appendixes.

Chapter or Appendix	Description
<i>Chapter 1, Introduction</i>	Introduces you to Smart Orchestration Cockpit and provides information to grant access to users.
<i>Chapter 2, Accessing Smart Orchestration</i>	Provides information for you to manage, monitor, and troubleshoot workflows directly from the Manager Portal.
<i>Chapter 3, Enabling Smart Orchestration in ITA</i>	Provides information for you to enable Smart Orchestration in ITA.
<i>Chapter 4, Interacting with Everbridge Suite</i>	Provides information to configure iPaaS for Smart Orchestration and to enable interactivity with your Smart Orchestration workflows.

## Conventions

The following table describes the typographical conventions used in this guide.

Convention	Meaning
Monospace	Indicates text that should be entered <i>exactly as shown</i> (including punctuation) or examples of code. Here is an example of a command line: <pre># mkdir /somedir</pre>
<b>Bold</b>	Indicates text that must be typed by the user. For example, From the Title field, type <b>XXX</b> and press TAB to advance to the next field.
<i>Italic</i>	Indicates one of the following: <ul style="list-style-type: none"><li>◇ A cross-reference. For example, "For more information, see <i>Related Documentation</i> on page viii".</li><li>◇ A glossary term being defined for the first time.</li></ul>
ENTER, SHIFT, CTRL, TAB, and so forth	Workstation keyboard keys to be pressed are shown in uppercase type.
Press TAB.	To advance to the next field, instructions are to "press TAB." Alternatively, you can click the primary mouse button in the next field.



Convention	Meaning
>	In step-by-step procedures, the > symbol separates different commands to select. For example, select Incidents > Incident Templates > New Incident Template.
Interchangeable Terms	The following terms are used interchangeably: <ul style="list-style-type: none"> <li>◆ Mass Notification and MN</li> <li>◆ Incident Communications and IC</li> </ul>
<b>NOTE</b>	A note emphasizes information that is of particular significance for the topic under discussion.

## Related Documentation

Documentation is provided to help you implement and run the Everbridge Suite of products. In addition to this publication, the Everbridge Suite documentation set consists of the following guides. You can view and/or download the PDF-formatted guides from Everbridge University. Print the PDFs in duplex (2-sided) mode to save resources.

Guide	Description	Intended Audience
Everbridge Suite Everbridge Open User Guide	The Everbridge Open User Guide helps you learn about the two-way capabilities that allow third-party systems to create powerful closed-loop integrations with our Critical Event Platform.	Users who will manage Everbridge Open connectors: Safety connectors, ITA connectors, and Risk Event connectors
Everbridge Suite Everbridge Suite User Guide	The reference source for using the production system. It provides information about the Mass Notification product to enable you to quickly set up configuration options and then use the system.	Administrators and operators
Everbridge Suite Incident Management User Guide	Provides the information that helps you automate your communication center operations and communication plans.	Account Administrators, Incident Administrators, and Incident Operators (users who will manage incidents and/or manage the communication plan for the organization)
Everbridge Suite REST Application Programming Interface Guide	Lists the Data Types that are in the REST API (Representational State Transfer Application Programming Interface).	Developers and application programmers
Everbridge Suite CEM Connectors	Provides documentation about connectors available for Everbridge Suite. Connectors allow you to integrate Smart Orchestration Cockpit with your enterprise software,  <a href="https://support.everbridge.com/connectors">https://support.everbridge.com/connectors</a>	Technical users responsible for configuring and customizing workflow automation, including system integration engineers and solution architects
Smart Orchestration Workflow Designer Online Help	Provides information to navigate workflow designer, provides functions, actions, and connectors.  <a href="https://product.integrations.everbridge.net/sc/docs/Workflow.html#workflow">https://product.integrations.everbridge.net/sc/docs/Workflow.html#workflow</a>	Technical users responsible for configuring and customizing workflow automation, including system integration engineers and solution architects





---

# Document Control Information

Label	Description
Document Name	Smart Orchestration Cockpit User Guide
Document Owner	Lucy.Kajimoto@Everbridge.com
Document Version	<b>1.0</b>
Document Status	Approved
Classification	PUBLIC (Customers, Employees, and Contractors of Everbridge)
Compliance Scope	Information Handling and Document Control Policy v1.0
Effective Date	The date shown on the Title Page

## Document Change History

All publications are reviewed every product release, and updated as needed. See the *Related Documentation* section of the current *Everbridge Suite Release Notes* for a list of the major changes to each publication.



# Introduction

This chapter provides information for you to grant access to users.

**The following topics are covered:**

- ◇ *Overview*
- ◇ *Granting Access to Users*



## Overview

Smart Orchestration Cockpit is a workflow automation engine that enables users to build or customize workflows to automate and monitor business processes through a graphical user interface. Smart Orchestration enables integrations to third-party systems. Customers can deploy and customize out-of-the-box connectors with pre-packaged workflows, or build custom workflows using a wide variety of workflow components including actions, processes, and conditional nodes. Smart Orchestration Cockpit best practice packages include incident response management.

Built-in connectors and integrated actions for a wide variety of IT applications system monitoring are also provided; for example, APM, NPM, DevOps, event correlation tools, BCM, ITSM systems such as ServiceNow, Cherwell, BMC Remedy, and collaboration tools like Slack, and WebEx teams.

Smart Orchestration can be enabled as a Read-Only or a Read/Write feature. Typically, licensed customers are enabled as Read/Write in their Test organization, while enabled as Read-Only in the production organization.

Make sure your Everbridge Professional Services representative enables Smart Orchestration at the Account level and Organization level.

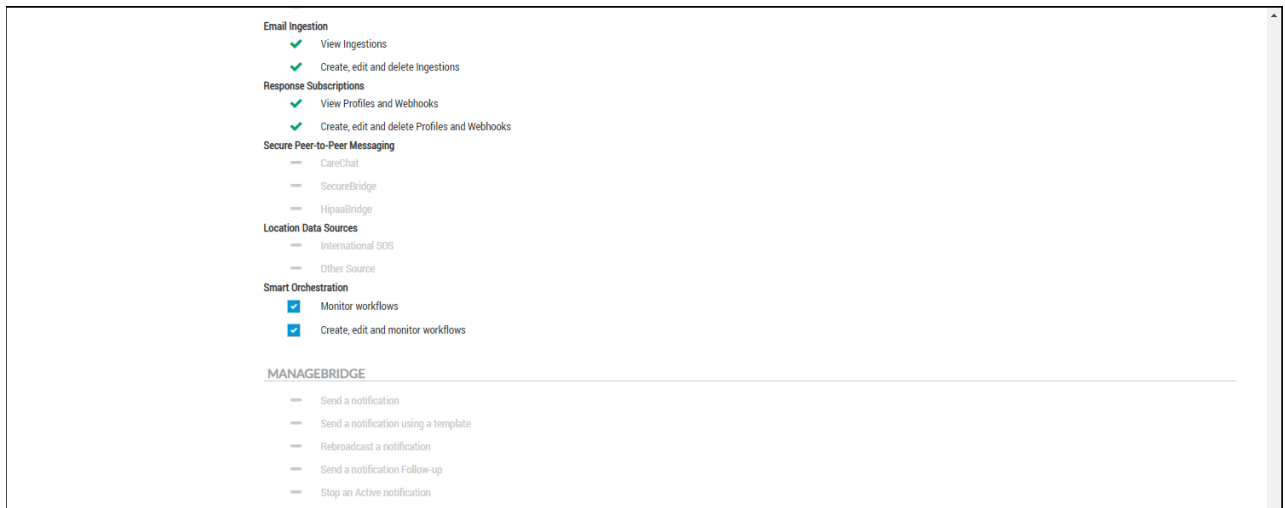


# Granting Access to Users

Only authorized Incident Administrators or Incident Operators can access Smart Orchestration.

## To grant Smart Orchestration access to an Incident Administrator or an Incident Operator in your organization

- 1 From the Account level, select the Roles tab.
- 2 Select the Organization radio button and choose your organization from the drop-down list.
- 3 Either create an Incident Administrator or Incident Operator role, or update an existing Incident Administrator or Incident Operator role.
- 4 Scroll to the Smart Orchestration permissions.
- 5 Select one or both of the following:
  - **Monitor Workflows**—allows the user to access all monitoring dashboards and troubleshooting tools for running workflows.
  - **Create, edit, and monitor workflows**—allows the user to access all monitoring dashboards and troubleshooting tools for running workflows and allows users to create new or edit existing workflows in the Workflow Designer tool. (If Enable Workflow Editing is not granted for the organization, this option is disabled.)



- 6 Scroll to the bottom of the page and click Save.
- 7 Assign the role to a user.



# Accessing Smart Orchestration

This chapter provides information for you to manage, monitor, and troubleshoot workflows directly from the Manager Portal.

**The following topics are covered:**

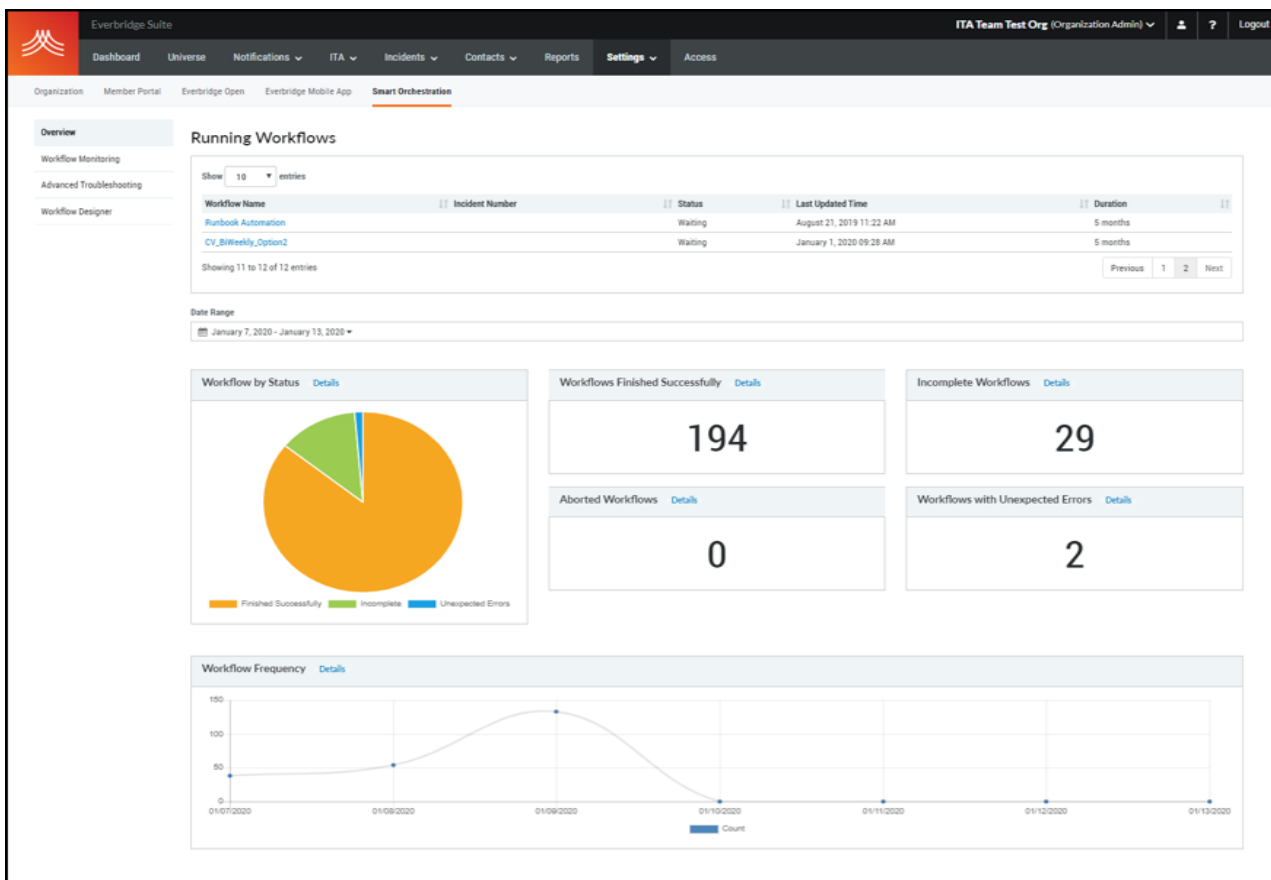
- ◇ *Accessing Smart Orchestration*
- ◇ *Monitoring Workflows*
- ◇ *Advanced Troubleshooting*
- ◇ *Viewing and Designing Workflows*
- ◇ *Using the Package Manager*



# Accessing Smart Orchestration

## To access Smart Orchestration

- 1 Select the role that granted you Smart Orchestration permission if you have more than one role.
- 2 From the Settings tab, select Smart Orchestration. The Smart Orchestration subtab is displayed only for authorized users.
- 3 From the Overview, review the dashboard of workflow activities for your organization.



- **Running Workflows**—Running Workflows displays the number of workflows that are currently running.
- **Date Range**—Select from Today, Last 7 Days, and a Custom Range.
- **Workflow by Status**—Shows an aggregation of the workflow outcome and the status of the workflow engine for a specific instance. You can also select the Details button to see a date range and status of a workflow, including: Workflow Name, Incident Number, Last Updated Time, Status, and Duration (milliseconds).





The panes to the right of Workflow by Status pane show you the number of workflows:

- **Workflows Finished Successfully**—Workflows completed without errors.
- **Incomplete Workflows**—Workflows that did not reach the end due to a given node error.
- **Aborted Workflows**—Workflows that did not complete and were aborted during execution.
- **Workflows with Unexpected Errors**—Workflows did not reach their end due to either an internal error of the workflow engine or an invalid workflow.

Click the Details button from any pane to see additional information.

- **Workflow Frequency**—Shows a time series chart of the workflow execution count for the specific time range.



# Monitoring Workflows

## To monitor workflows

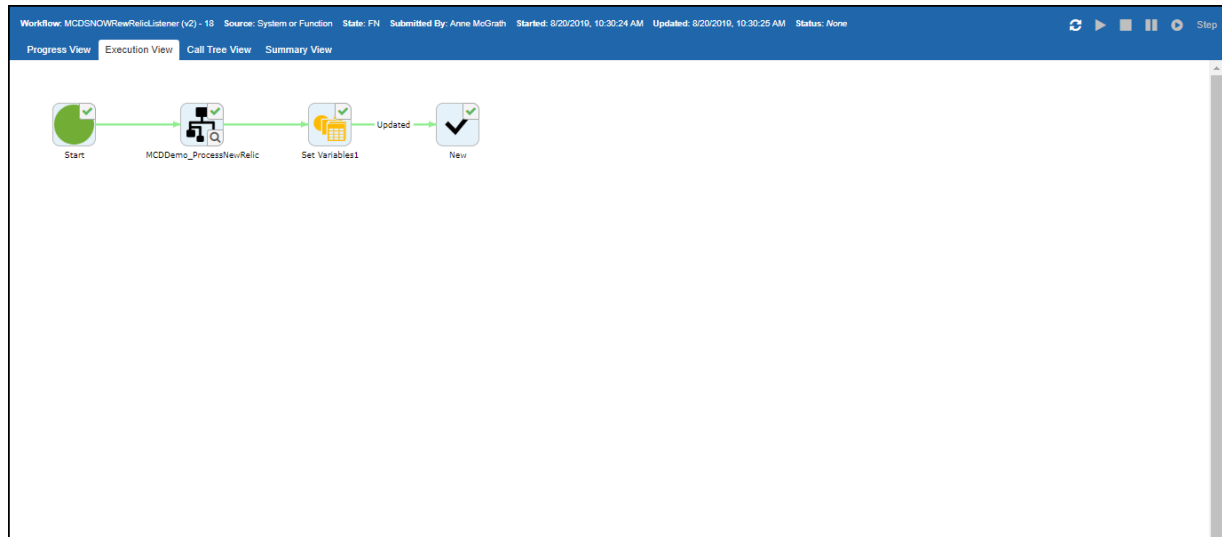
- 1 From the Settings tab, select Smart Orchestration > Workflow Monitoring. The list of workflows is displayed, where you can filter by Workflow name, Date Range, and Status.

The screenshot displays the 'Workflow Monitoring' page in the Everbridge Suite. The interface includes a navigation menu at the top with options like Dashboard, Universe, Notifications, ITA, Incidents, Contacts, Reports, Settings, and Access. The main content area is titled 'Workflow Monitoring' and features several filter controls: 'Workflow' (a text input field), 'Date Range' (a date range selector set to 'January 7, 2020 - January 13, 2020'), 'Status' (a dropdown menu set to 'Any'), and 'Everbridge Incident ID' (a text input field). Below these filters is a table with columns for 'Workflow Name', 'Everbridge Incident', 'Source ID', 'Status', 'Last Updated Time', and 'Duration'. The table contains 10 rows of data, all showing a status of 'Finished Successfully'. At the bottom of the table, there is a pagination control showing 'Showing 1 to 10 of 225 entries' and a 'Previous' button followed by page numbers 1, 2, 3, 4, 5, and a 'Next' button.

Workflow Name	Everbridge Incident	Source ID	Status	Last Updated Time	Duration
EVBG Import Package			Finished Successfully	January 9, 2020 03:49 PM	a few seconds
EVBG Import Package			Finished Successfully	January 9, 2020 03:34 PM	a few seconds
SNOW ContactSync			Finished Successfully	January 9, 2020 01:46 PM	a few seconds
SNOW ContactSync CSVRecord			Finished Successfully	January 9, 2020 01:46 PM	a few seconds
SNOW ContactSync GetUserGroups			Finished Successfully	January 9, 2020 01:46 PM	a few seconds
SNOW ContactSync CSVRecord			Finished Successfully	January 9, 2020 01:46 PM	a few seconds
SNOW ContactSync GetUserGroups			Finished Successfully	January 9, 2020 01:46 PM	a few seconds
SNOW ContactSync CSVRecord			Finished Successfully	January 9, 2020 01:46 PM	a few seconds
SNOW ContactSync GetUserGroups			Finished Successfully	January 9, 2020 01:46 PM	a few seconds
SNOW ContactSync CSVRecord			Finished Successfully	January 9, 2020 01:46 PM	a few seconds



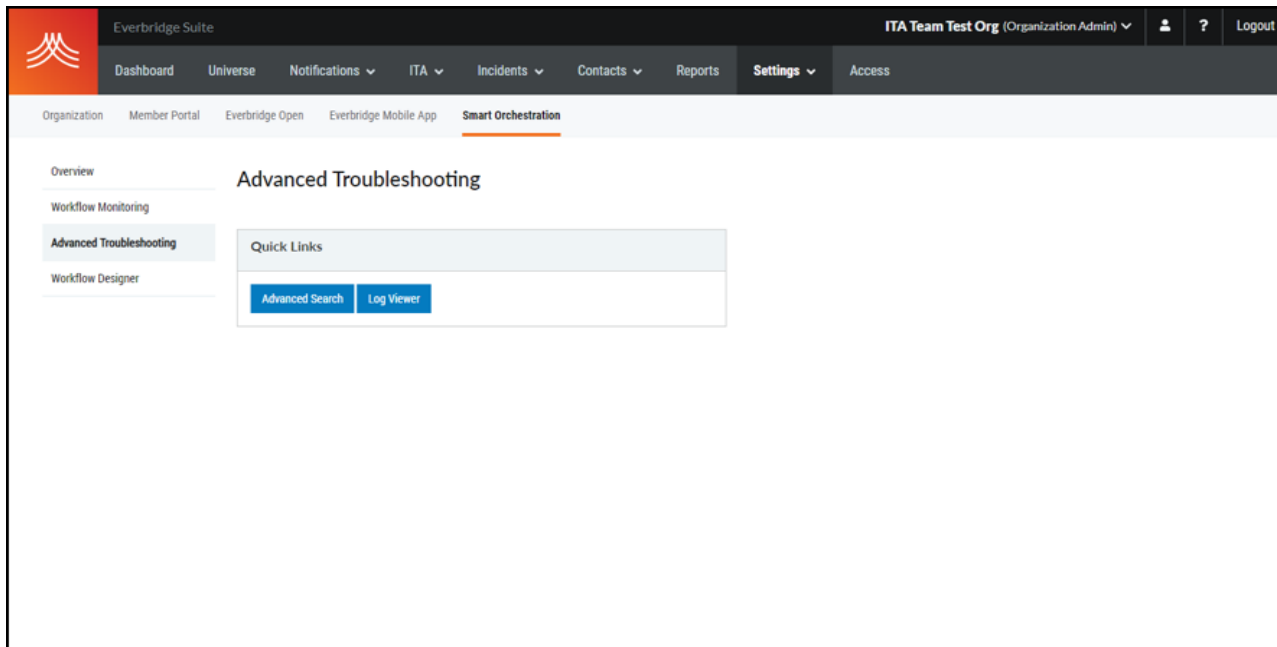
- 2 Drill down to the Execution View by selecting the Workflow Name, and selecting Execution View.





# Advanced Troubleshooting

Two tools are available for advanced troubleshooting: Advanced Search and Audit Logs.



## Advanced Search

Advanced Search gives users the power to locate and act on multiple workflows simultaneously.

### To troubleshoot using Advanced Search

- 1 From the Settings tab, select Smart Orchestration > Advanced Troubleshooting > Advanced Search.
- 2 Read the warning, then click the check box: I understand.  
An Advanced Search window, called Bulk Process Control, opens in a new browser tab, giving the users the power to locate and act on multiple Workflows simultaneously.



### Bulk Process Control

Build Query Custom Query

**Workflow**

Filter...

- Any\*
- \_Milestones
- 1FFC\_SalaryReportRequest
- 6543
- AAAA
- abc
- ActionStepping
- Active directory
- ActorAssignEnvContent
- AD\_ExecuteAswithProxy

**Status**

**General Status**

- Any
- Running
- Not Running

**Literal Status**

- Aborted
- Pending
- Executing
- Finished with Errors

**Requested On**

yyyy/mm/dd - yyyy/mm/dd

**Updated On**

yyyy/mm/dd - yyyy/mm/dd

**Submitted By**

**Execution Ids**

**Outcome State**

- Any
- Not Finished
- Task Complete
- Task Incomplete

**Max Rows To Return**

100

**Show Row Numbers**

**Run Query**

Row Count: 100

ID	Workflow	Version	RequestedOn	InternalStatus	Status	LastUpdatedDateTime	UserIdString	UserDisplayName	OutcomeState
<input type="checkbox"/> 46593	Sharepoint_LB	1	06/14/2017 11:58 AM	Finished Successfully (FN)		06/14/2017 11:58 AM	isodhani@pmgnet.dev	IS Sodhani	TC
<input type="checkbox"/> 46592	Sharepoint_LB	1	06/14/2017 11:56 AM	Finished Successfully (FN)		06/14/2017 11:56 AM	isodhani@pmgnet.dev	IS Sodhani	TC
<input type="checkbox"/> 46591	Anna	22	06/14/2017 11:53 AM	Waiting (SL)		06/14/2017 11:53 AM	a-balexander@pmgnet.dev	_Ben Alexander	
<input type="checkbox"/> 46590	Share Point Connectors	2	06/14/2017 11:14 AM	Finished Successfully (FN)	Success	06/14/2017 11:41 AM	isodhani@pmgnet.dev	IS Sodhani	TC
<input type="checkbox"/> 46589	Share Point Connectors	2	06/14/2017 11:05 AM	Finished Successfully (FN)		06/14/2017 11:10 AM	isodhani@pmgnet.dev	IS Sodhani	TC
<input type="checkbox"/> 46588	Sharepoint_LB	1	06/14/2017 11:02 AM	Finished Successfully (FN)		06/14/2017 11:02 AM	isodhani@pmgnet.dev	IS Sodhani	TC
<input type="checkbox"/> 46587	Sharepoint_LB	1	06/14/2017 10:58 AM	Finished Successfully (FN)		06/14/2017 10:58 AM	isodhani@pmgnet.dev	IS Sodhani	TC
<input type="checkbox"/> 46586	Share Point Connectors	2	06/14/2017 10:39 AM	Finished Successfully (FN)		06/14/2017 10:39 AM	isodhani@pmgnet.dev	IS Sodhani	TC
<input type="checkbox"/> 46585	Share Point Connectors	2	06/14/2017 10:24 AM	Finished Successfully (FN)		06/14/2017 10:38 AM	isodhani@pmgnet.dev	IS Sodhani	TC

- Use the Query Builder to filter and locate workflows with a common set of parameters. You can filter by workflow, state, requested date, updated date, submitter, specific execution IDs, and outcome state. A maximum number of rows can be returned, and optionally, row numbers can be displayed.
- Once all parameters have been set, select Run Query to view the results. (Use the Custom Query to write your own query. See *step 7* below.)
- Look at the query results at the bottom portion of the screen. You are presented with the following information regarding the displayed workflows:
  - ID**: Numeric ID of the workflow associated with a specific Request
  - Workflow**: Name of the workflow
  - Version**: Version of the workflow
  - Requested On**: Date and time when the Request was submitted
  - Internal Status**: Execution state of the workflow
  - Status**: Status of the workflow
  - Last Updated Date/Time**: Date and time of the last update to the workflow
  - User Id**: Unique User ID of the user who submitted the workflow
  - User Name**: Name of the user who submitted the Request



- **Outcome:** Outcome State of the Workflow (not applicable for sub-workflows)
  - **Source:** System or Function
- 6 Select one of the following action options after selecting a workflow:
    - **Pause:** Brings a running workflow to a temporary stop
    - **Resume (Paused Workflow):** Resumes a workflow that was previously paused
    - **Resume (Error Workflow):** Resume a workflow that had previously ended as an error
    - **Abort:** Brings a running workflow to a permanent stop
  - 7 Use the Custom Query to write your own query. Once you have written your query, click Run Query to view the results. See *step 5* above for details.

**Bulk Process Control**

Build Query | Custom Query

```

SELECT TOP 100 Id, Workflow, [Version], StartedOn, [State], StatusText, [Status], LastUpdatedDateTime, [UserId], UserDisplayName, OutcomeState
Source = CASE WHEN OrderNumber > 0 THEN
  CAST(OrderNumber as nvarchar(50)) + '/' + CAST(TopParentWorkflowId as nvarchar(50))
ELSE
  'System or Function'
END,
IsChildWorkflow = CASE WHEN TopParentWorkflowId <> Id THEN
  cast(1 as bit)
ELSE
  cast(0 as bit)
END,
_OrderNumber,
_system_created
FROM ( SELECT SWE.ID, SWE.Name Workflow, SWP.Version, SWE.StartedOn,
  SWE.[State], ST.StatusText, SWE.Status, SWE.LastUpdatedDateTime, SKA.UserId,
  SKA.DisplayName as UserDisplayName, SWE.OutcomeState,
  _COALESCE(rel.TopParentWorkflowId, SWE.Id) AS TopParentWorkflowId,
  _COALESCE(req.order_number, 0) AS OrderNumber,
  _COALESCE(req.system_created, 0) as system_created
FROM RTWorkflow SWE with (nolock)
INNER JOIN RTUser SKA with (nolock) ON SWE.StartedBy = SKA.ID
INNER JOIN DTWorkflow SWP with (nolock) ON SWP.ID = SWE.DTWorkflowId
INNER JOIN c_status_text ST with (nolock) ON ST.InternalStatus = SWE.[State]
LEFT OUTER JOIN RTRelation rel ON rel.ChildWorkflowId = SWE.Id
LEFT OUTER JOIN SC_RequestData req ON req.execution_id = COALESCE(rel.TopParentWorkflowId, SWE.Id)

```

Run Query

Row Count: 100

Id	Workflow	Version	StartedOn	State	StatusText	Status	LastUpdatedDateTime	UserId	UserDisplayName	OutcomeState	Source	IsChildWorkflow	OrderNumber	system_created
211943	EVBO Import Package	42	1/9/2020 8:40:58 PM	FN	Finished Successfully	Package Tucoos StatusPage exported from Dev Tucoos to https://release.integrations.everbridge.net/sc	1/9/2020 8:49:14 PM	ajgoe@ebta.local	Ajay Goel	TC	372-211943	False	372	0
211942	EVBO Import Package	42	1/9/2020 8:34:14 PM	FN	Finished Successfully	Package Tucoos StatusPage exported from Dev Tucoos to https://release.integrations.everbridge.net/sc	1/9/2020 8:34:43 PM	ajgoe@ebta.local	Ajay Goel	TC	371-211942	False	371	0
211941	SNOW ContactSync CSVRecord	5	1/9/2020 8:40:40 PM	FN	Finished Successfully	Ajay.Goel.its.everbridge@gmail.com..Employee."Network CAB Managers/Database Atlanta	1/9/2020 8:40:41 PM	ajgoe@ebta.local	Ajay Goel	TC	System or Function	True	0	0
211940	SNOW ContactSync GetUserGroups	11	1/9/2020 8:40:40 PM	FN	Finished Successfully	Group names for Ajay Goel: "Network CAB Managers/Database Atlanta	1/9/2020 8:40:40 PM	ajgoe@ebta.local	Ajay Goel	TC	System or Function	True	0	0
211939	SNOW ContactSync CSVRecord	5	1/9/2020 8:40:38 PM	FN	Finished Successfully	Abraham.Lincoln.abraham.lincoln@example.com..Employee."US Presidents Group 2	1/9/2020 8:40:39 PM	ajgoe@ebta.local	Ajay Goel	TC	System or Function	True	0	0
211938	SNOW ContactSync GetUserGroups	11	1/9/2020 8:40:38 PM	FN	Finished Successfully	Group names for Abraham Lincoln: "US Presidents Group 2	1/9/2020 8:40:38 PM	ajgoe@ebta.local	Ajay Goel	TC	System or Function	True	0	0
211937	SNOW ContactSync CSVRecord	5	1/9/2020 8:40:38 PM	FN	Finished Successfully	Don.Goodfills.don.goodfills@example.com..Employee."Hardware/Software/Database San Diego/Network CAB	1/9/2020 8:40:38 PM	ajgoe@ebta.local	Ajay Goel	TC	System or Function	True	0	0

## Log Viewer

The Log Viewer allows you to review system-generated log data for advanced troubleshooting. From the Log Viewer page, you can view log data for the web components of the platform, as well as the base platform and workflow details, by selecting the appropriate tab.



Application and Summary logs give you information about workflow errors.

### To troubleshoot using the Log Viewer

- 1 From the Settings tab, select Smart Orchestration > Advanced Troubleshooting > Log Viewer.
- 2 Select the corresponding tab to view log data.

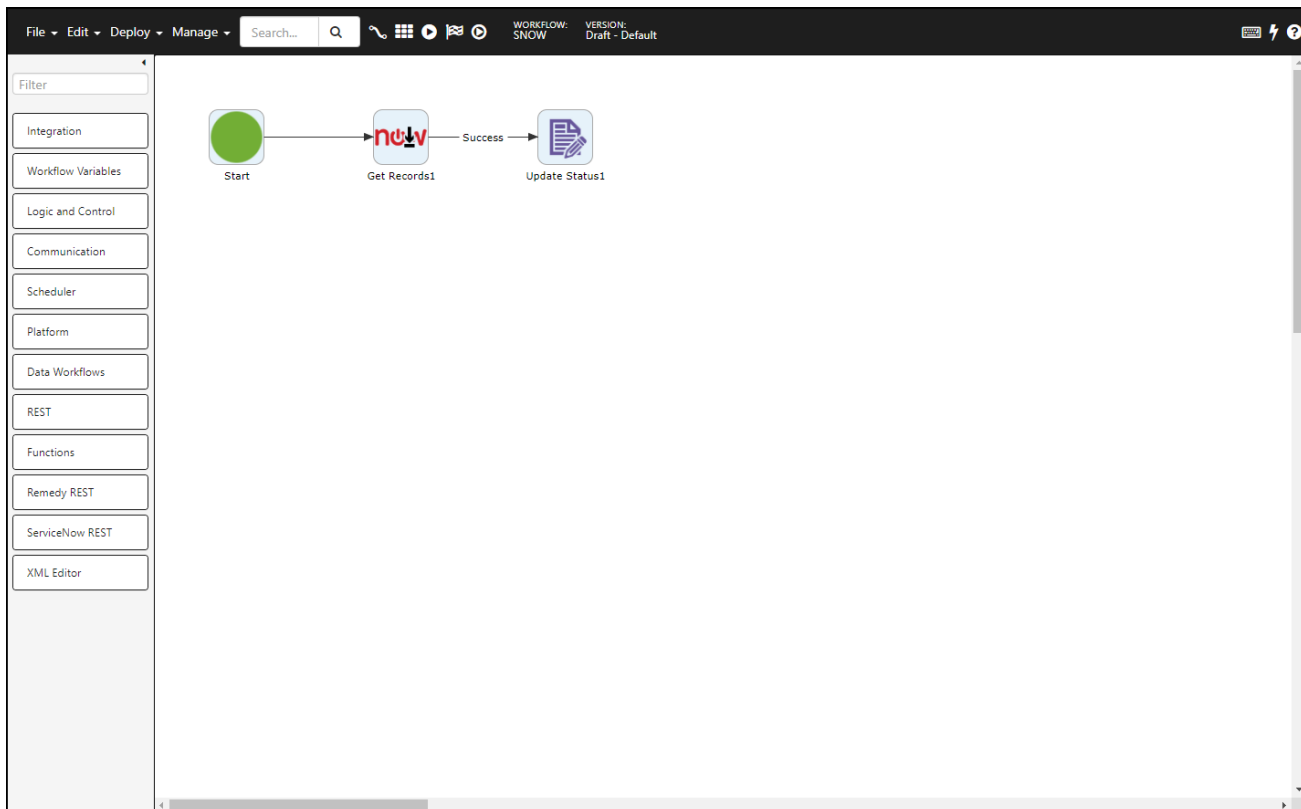


# Viewing and Designing Workflows

The Workflow Designer provides the primary interface for creating and managing workflows. Authorized administrators can create and manage workflows to perform any number of tasks, and to perform system integrations, data transformations, scheduled activities, and more.

## To use the Workflow Designer

- 1 From the Settings tab, select Smart Orchestration > Workflow Designer. The Workflow Designer opens in a new window.



- 2 Depending on your permissions:
  - Users with **Monitor Workflow** permission can open and view existing workflows.
  - Users with **Create, edit, and monitor workflow** permissions can edit, create, and test workflows, in addition to the monitoring capabilities.
- 3 Click the Help (?) button in the upper right-hand corner of the screen to access the Workflow Designer documentation.



### Smart Orchestration

- Smart Orchestration Platform
- Data Workflows
- BPMN Elements
- OLA and SLA
- Office
- File Management
- REST
- XML Editor
- Active Directory
- Action Events

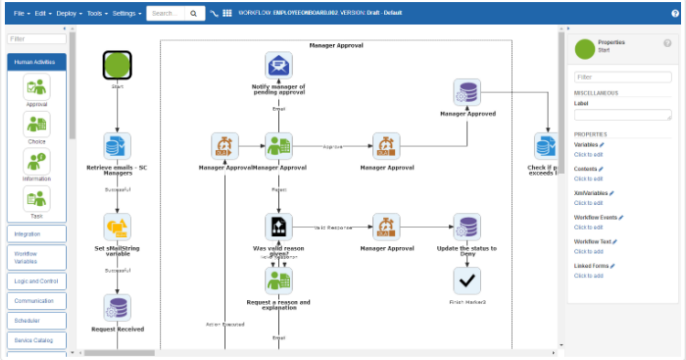
### Workflow

- General Workflow Management
  - Workflow management terminology and concepts
  - Creating new workflows
  - Saving workflow versions
  - Deleting workflow versions
  - Saving images of a workflow
  - Deploying workflows
  - Assigning workflow permissions
- Forms and Workflow
  - Manually Referencing Service Form Content within Workflows
- Workflow Collections
- Workflow Version Control
- Workflow Designer Controls
- Connecting actions
- Automatic Output Selection

## Workflow

The Workflow Designer allows authorized administrators to create and manage workflows to perform any number of tasks, performing system integrations, data transformation, scheduled activities, and more. Additionally, workflows can be related to any number of forms, dictating how the submitted forms are processed. The web-based Work Items List is the interface through which end-users would process work assigned to them through a workflow. The Process Manager is an administrative interface providing a detailed dashboard view of all existing workflows and related activities currently running in the system.

The Workflow Designer interface is a web based visual diagramming tool, allowing administrative users to model their workflow processes visually.



Each step in a workflow design is referred to as an "Action". An Action encapsulates more complex logic, such as assigning work to people, executing logic, or performing integrations. Each Action has properties, which control the behavior and output of the action, as desired.



---

# Using the Package Manager

Use the Package Manager to install and import your own packages to define your workflows. The connectors are available on the CEM Connectors page. See: <https://support.everbridge.com/connectors>

## To access the connector documentation

- 1 From the Everbridge Support Center, click the Documents tab.
- 2 Click the CEM Connectors tab, then click the link to open the connectors page.
- 3 Click the logo of the desired connector (one of the connectors listed above).
- 4 Click the Documentation link to view the PDF.

## To manage your workflows

- 1 From the Settings tab, select Smart Orchestration > Package Manager. The Templates and Best Practice Packages dialog is displayed.



Everbridge Suite

Documentation (Organization Admin) | User | ? | Logo

Dashboard | Universe | Notifications | ITA | Critical Events | Incidents | Contacts | Reports | Settings | Access

Organization | Resident Portal | Member Portal | Everbridge Open | Everbridge Mobile App | **Smart Orchestration**

### Templates and Best Practice Packages

Workflows have been created and packaged for your convenience.

- Core packages includes predefined workflows that are ready to be used.
- Best practice packages are workflows that can be used as a starting point to define your own workflows.

Please select the type and the name of the package that you want to import.

Package Type: Cherwell

Package Name: Cherwell Major Incident

**Cherwell Major Incident**

The Everbridge Cherwell Major Incident Management integration allows creation/update/closure of a Cherwell incident based on an incident created/updated/closed in Cherwell.

[Import Package](#)

#### IMPORTED PACKAGES

Show 10 entries | Search: | [Export to excel](#)

Name	Imported Date	Configure
Everbridge Incident	February 12, 2021 04:51 PM	
Everbridge Public APIs	April 23, 2020 12:53 PM	
Everbridge Response Subscription	April 28, 2020 09:17 AM	
ServiceNow Contact Sync	April 29, 2020 03:44 PM	
ServiceNow Major Incident	April 29, 2020 03:47 PM	<a href="#">Configure ServiceNow Major Incident</a>

Showing 1 to 5 of 5 entries

Previous | 1 | Next

- 2 Select the package from the Package Type drop-down list.
- 3 Select the name from the Package Name drop-down list.
- 4 Click Import Package.  
A list of the imported packages is displayed at the bottom of the dialog.



# Enabling Smart Orchestration in ITA

This chapter provides information for you to enable Smart Orchestration in ITA.

**The following topics are covered:**

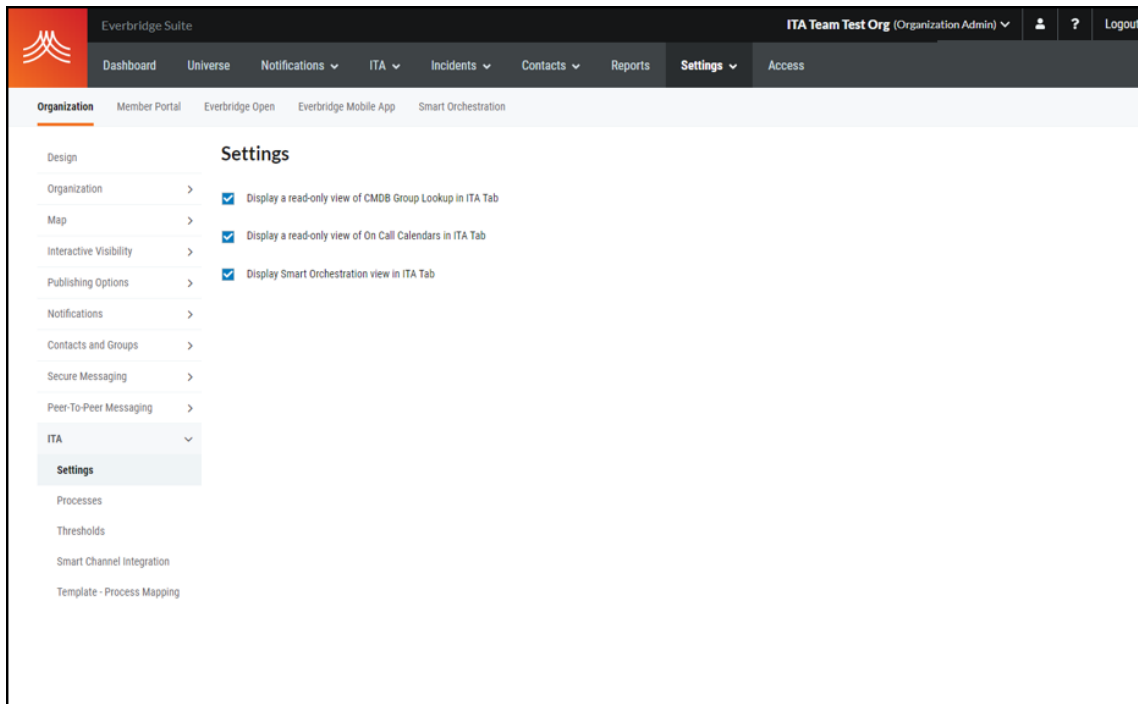
- ◇ *Enabling Smart Orchestration in ITA*



# Enabling Smart Orchestration in ITA

## To enable Smart Orchestration in ITA

- 1 Navigate to Settings > Organization > ITA > Settings.
- 2 Select the check box: Display Smart Orchestration view in 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 Overview and the Workflow Monitoring dashboards, as well as statistical information about workflow duration.

- 3 Navigate to the ITA dashboards.
- 4 Select the Smart Orchestration tab.  
The following dashboards are displayed:
  - Overview
  - Workflow Monitoring
  - Workflow Duration
- 5 Select Workflow Duration.
- 6 In the list of workflows, select the workflow from which you want to see statistical information.



7 Select the Date Range.

The following information is available:

- Average Durations for the workflow execution
- Timeline of the workflow execution
- List of each workflow execution with status, start time, duration, and incident information



Everbridge Suite ITA Team Test Org (Organization Admin) [User Icon] [Help Icon] Logout

Dashboard Universe Notifications ITA Incidents Contacts Reports Settings Access

Open Incidents Trends Operations Calendars CMDB Group Lookup **Smart Orchestration**  [Search Icon]

Overview

Workflow Monitoring

**Workflow Duration**

Date Range: January 7, 2020 - January 13, 2020

Workflow Name: SNOW ContactSync CIVRecord

[Back](#)

### Average Durations in Seconds

Date	Average Duration (Seconds)
01/07/2020	0.0
01/08/2020	0.0
01/09/2020	0.0
01/10/2020	0.0
01/11/2020	0.0
01/12/2020	0.0
01/13/2020	0.0

### Executions

Date	Executions
01/07/2020	0
01/08/2020	0
01/09/2020	45
01/10/2020	0
01/11/2020	0
01/12/2020	0
01/13/2020	0

Show 10 entries

Workflow ID	Everbridge Incident	Source ID	Status	Start Time	Duration in Seconds
211941			Finished Successfully	January 9, 2020 01:46 PM	1
211929			Finished Successfully	January 9, 2020 01:46 PM	0
211927			Finished Successfully	January 9, 2020 01:46 PM	0
211925			Finished Successfully	January 9, 2020 01:46 PM	0
211933			Finished Successfully	January 9, 2020 01:46 PM	0
211921			Finished Successfully	January 9, 2020 01:46 PM	0
211929			Finished Successfully	January 9, 2020 01:46 PM	1
211927			Finished Successfully	January 9, 2020 01:46 PM	1
211925			Finished Successfully	January 9, 2020 01:46 PM	0
211923			Finished Successfully	January 9, 2020 01:46 PM	0

Showing 1 to 10 of 45 entries Previous 1 2 3 4 5 Next



# Interacting with Everbridge Suite

This chapter provides information to configure iPaaS for Smart Orchestration and to enable interactivity with your Smart Orchestration workflows.

**The following topics are covered:**

- ◇ *Sending Events to Everbridge Suite*
- ◇ *iPaaS*
  - *iPaaS Configuration*
  - *Smart Orchestration Configuration for iPaaS*
- ◇ *Everbridge Suite REST API*
  - *REST API User Configuration*



## Sending Events to Everbridge Suite

Smart Orchestration can send events to Everbridge Suite for assessment, visualization, and automated or manual communication and response. These are the main points for Smart Orchestration to send events into Everbridge Suite:

- ◇ Integration Platform as a Service (iPaaS)
- ◇ Everbridge Suite REST API



# iPaaS

iPaaS enables us to automate incident communications based on defined criteria for events that can be sent through a Smart Orchestration workflow.

## To enable iPaaS

- 1 Ask your Everbridge representative to enable EB Open iPaaS for your account and organization.  
Your Everbridge representative enables your account and organization for iPaaS.
- 2 For usage with Smart Orchestration, choose API for your integration.

## iPaaS Configuration

Go to Settings -> Everbridge Open--> iPaaS à API and create an agent. Refer to the *Using the ITA API Connector* document for more details on configuring an iPaaS agent and conditions (<https://support.everbridge.com/connectors?id=a4N34000002XfQEAU>).

## Smart Orchestration Configuration for iPaaS

The Everbridge Incident Package allows you to easily configure launching an Everbridge Incident via iPaaS

Dashboard Universe Notifications Critical Events Incidents Contacts Reports Settings Access

Organization Member Portal Everbridge Open Everbridge Mobile App **Smart Orchestration**

Overview  
Workflow Monitoring  
Advanced Troubleshooting  
Workflow Designer  
**Package Manager**

### Templates and Best Practice Packages

Workflows have been created and packaged for your convenience.

- Core packages includes predefined workflows that are ready to be used.
- Best practice packages are workflows that can be used as a starting point to define your own workflows.

Please select the type and the name of the package that you want to import.

Package Type  
Everbridge

Package Name  
Everbridge Incident

Everbridge Incident  
Create/Update/Close an Everbridge Incident using the iPaaS API. Allows storing every transaction in a custom table **EBConfig**.

**Import Package**

IMPORTED PACKAGES

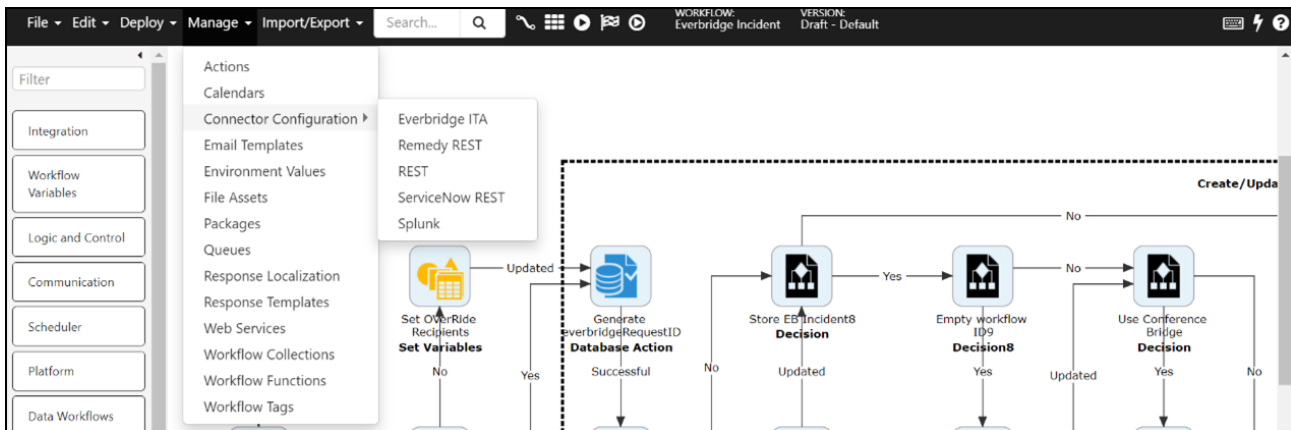
Show 10 entries Search:  **Export to excel**

Name	Imported Date	Configure
Everbridge Incident	March 22, 2021 02:37 PM	

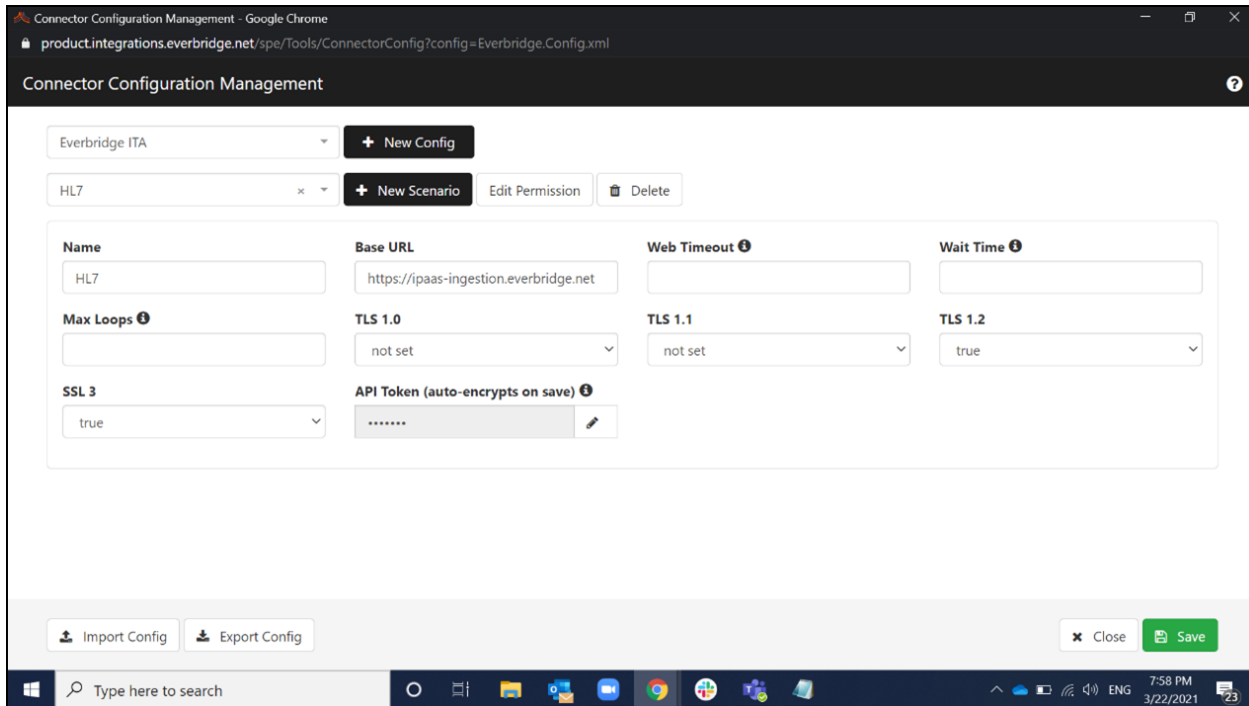


## To import the Everbridge Incident Package

- 1 In Workflow Designer, from the Manage menu, select Connector Configuration > Everbridge ITA.



- 2 Select Everbridge ITA as the config type.
- 3 Add a new scenario or configure an existing scenario.
- 4 Add your iPaaS URL as the Base URL, and your iPaaS API token in the Token field.



- 5 Add the Everbridge Incident function from the left-hand side Action panel to your workflow to launch an incident with the following variables:
  - a Source—This is the scenario name from Connector Configuration.



- b** Incident Details (this should only be used for simple strings)—This is the name value pair of the data that needs to get passed to iPaaS within the “incidentDetails” node  
For example:

```
"Class": "test",  
"Status": "Open",  
"Service Impact": "Offline"
```

- c** IncidentDetails JSON—This should be defined as a JSON Object. You should pass either this or Incident Details.

```
{  
  "Class": "test",  
  "Status": "Open",  
  "Service Impact": "Offline"  
}
```

- d** closeIncident—Set this to True if closing the incident.

- e** iPaaSRequest—Use the following for this:

```
{  
  "incidentID": "<Your Source System ID>",  
  "sourceSystemType": ""  
}
```

Other available options:

```
{  
  "incidentID": "<Your Source System ID>",  
  "requestId": "",  
  "sourceAddress": "",  
  "sourceSystemType": "",  
  "incidentMetadata": "",  
  "incidentOwnerUsername": ""  
}
```

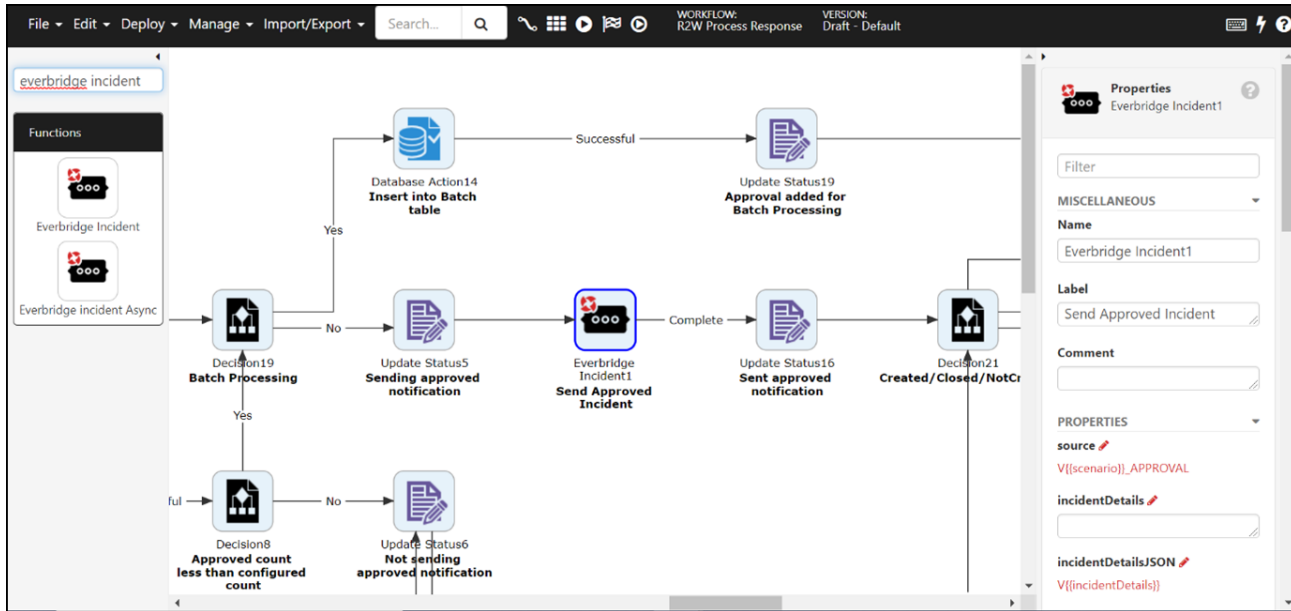
- f** overrideRecipients:

```
{  
  "contactType": "ID",  
  "contacts": [  
    "string"  
  ],  
  "groupType": "ID",  
  "groups": [  
    "string"  
  ]  
}
```

- 6** Review the values returned from the Everbridge Incidents function:
  - a** iPaaSStatus—This is the status from the iPaaS API (CREATED, NOTCREATED, INPROGRESS, FAIL)
  - b** everbridgeIncidentID—This is the Everbridge Incident ID
  - c** deliveryDetailsURL—If the iPaaS Status is CREATED, then this will be populated by a pre-authenticated URL



- d iPaaS Error—If any of the APIs (itsm, request status, or incident status) errors out, this will be populated:





# Everbridge Suite REST API

Everbridge Suite RESTful APIs enable interactivity with your Smart Orchestration workflows.

Documentation: <https://support.everbridge.com/articles/Documentation/REST-Application-Programming-Interface-Guide>

Swagger: <https://api.everbridge.net/>

## REST API User Configuration

### To configure a REST API User

- 1 As an Account Administrator, select the Users tab at the Account level.
- 2 Select add an access token.
- 3 Select a user with API access to add a new API access token.

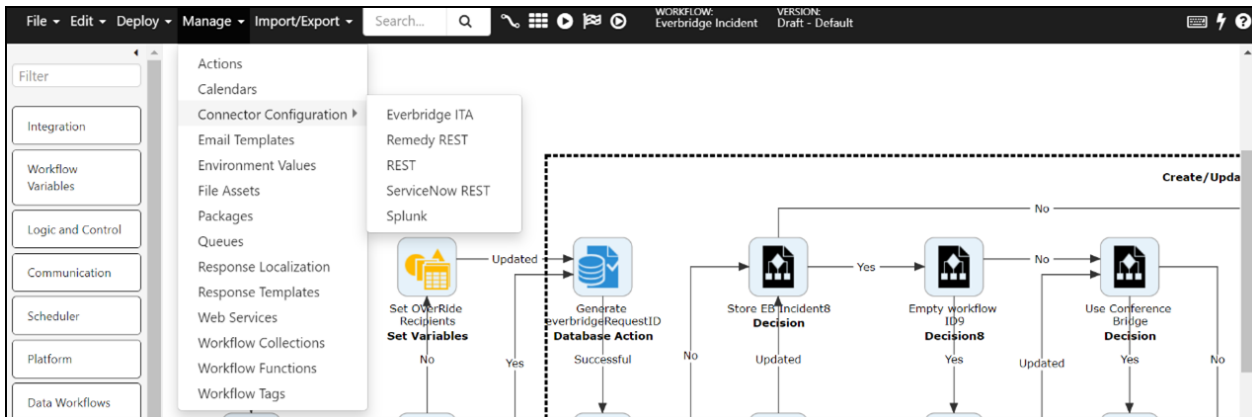
The screenshot shows the Everbridge Suite Account-Level Tools interface. The top navigation bar includes the Everbridge logo, 'Everbridge Suite Account-Level Tools', and the user 'Nadeem (Account Admin)'. The main navigation menu has 'Dashboard', 'Notifications', 'Contacts', 'Users', 'Roles', and 'Settings'. The 'Users' tab is selected, and the 'API users' sub-tab is active. Below the navigation, there is a 'Create Access Key' button and a 'Select User' dropdown menu. The dropdown menu is open, showing a list of users: 'steven.sturgeon@everbridge.com', 'tristan.mcperson.orca', 'jabaPowel', 'orca.api', and 'Nadeem.AIFarah1'. Below the dropdown is a 'Generate Access Key' button. A table of API users is displayed below the dropdown menu. The table has the following columns: User Name, User ID, Status, Created Date, Last Used Date, Last Updated Date, Last Updated By, and Action. The table contains three rows of data.

User Name	User ID	Status	Created Date	Last Used Date	Last Updated Date	Last Updated By	Action
jabaPowel	steven.sturgeon1@everbridge.com	Active	Dec 21, 2020 22:19:28 AST	Mar 8, 2021 11:18:37 AST	Dec 21, 2020 22:19:28 AST	Nadeem Al Farah	
orca.api	tristan.mcperson.orca	Active	Nov 5, 2020 12:04:01 AST	Mar 8, 2021 16:46:08 AST	Nov 5, 2020 12:04:01 AST	System	
Nadeem.AIFarah1	steven.sturgeon@everbridge.com	Active	Jul 20, 2020 14:03:34 AST	Nov 24, 2020 09:46:02 AST	Jul 20, 2020 14:03:34 AST	Nadeem Al Farah	

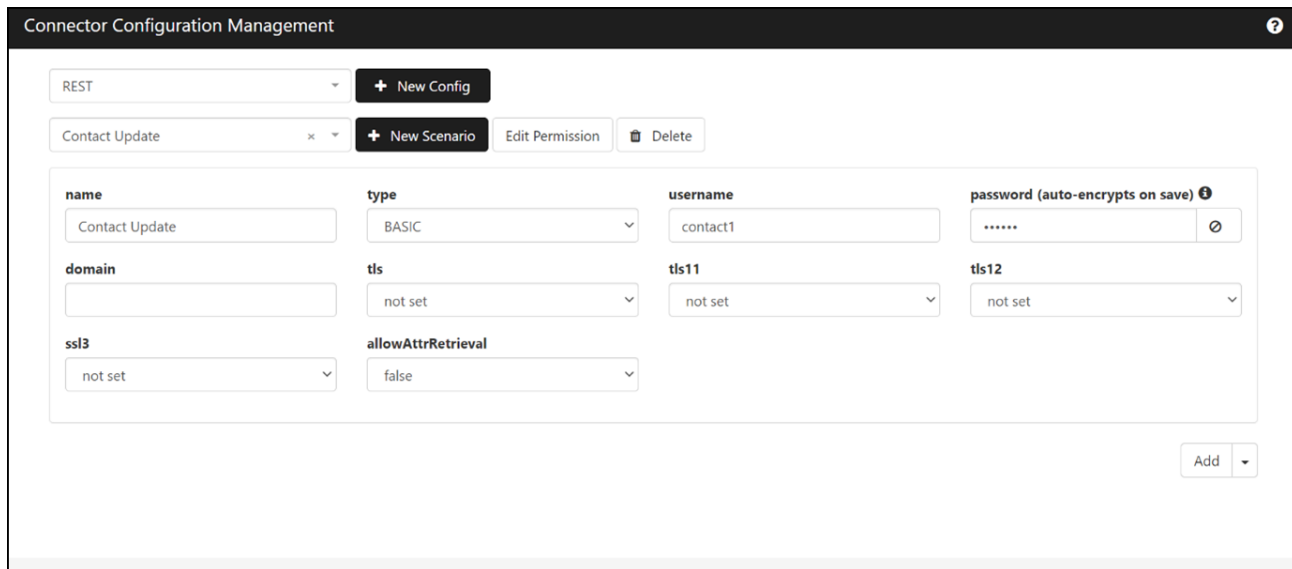


## To use the Everbridge REST API in Smart Orchestration

- 1 In Workflow Designer, from the Manage menu, select Connector Configuration > REST.



- 2 Select REST as the config type.
- 3 Add a new scenario or configure an existing scenario.
- 4 Add your Everbridge Suite API credentials and save (refer to the *Authentication* section of the *REST Application Programming Interface Guide*).



- 5 Add an Everbridge REST API workflow function from the Actions panel on the left-hand side of the workflow designer with the following configuration:
  - a Configure the scenario per the REST scenario configured in the Connector configuration
  - b Configure the baseURL per the API base URL for your Everbridge Suite environment. For example, `api.everbridge.net/rest/`



- The EB API Base URL can be configured as an environment variable by selecting environment variables under Manage in the top menu.
- c Specify the API method to use in the method property.
- d Prepare the payload to Everbridge Suite REST API and use payload property to pass the payload.
- e You may use specialized workflow functions for specific Everbridge Suite API calls. For example, contact management.

