Smart Orchestration Cockpit User Guide

Everbridge Suite

November 15, 2021

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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
Chapter 1, Introduction	Introduces you to Smart Orchestration Cockpit and provides information to grant access to users.
Chapter 2, Accessing Smart Orchestration	Provides information for you to manage, monitor, and troubleshoot workflows directly from the Manager Portal.
Chapter 3, Enabling Smart Orchestration in ITA	Provides information for you to enable Smart Orchestration in ITA.
Chapter 4, Interacting with Everbridge Suite	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 *exactly as shown* (including punctuation) or examples of code. Here is an example of a command line: `# mkdir /somedir`
Bold	Indicates text that must be typed by the user. For example, From the Title field, type **XXX** and press TAB to advance to the next field.
Italic	Indicates one of the following: ◊ A cross-reference. For example, "For more information, see *Related Documentation* on page viii". ◊ A glossary term being defined for the first time.
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: ◊ Mass Notification and MN ◊ Incident Communications and IC
NOTE	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, https://support.everbridge.com/connectors	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. https://product.integrations.everbridge.net/sc/docs/Workflow.html#workflow	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	**1.0**
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.

C H A P T E R

1

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.

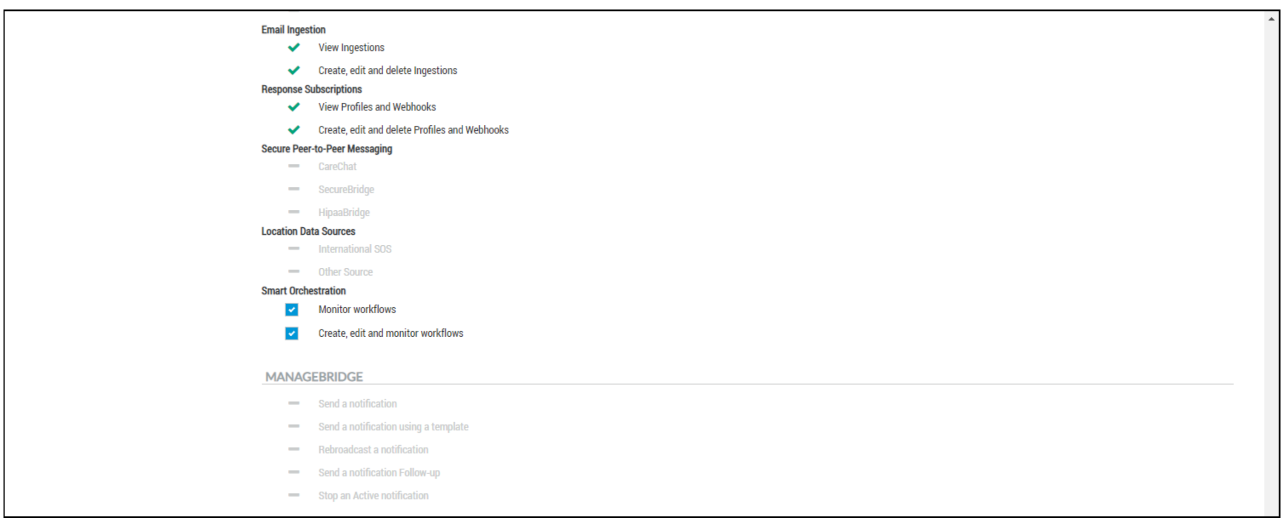
Make sure your Everbridge Professional Services representative enables Smart Orchestration at the Account level and Organization level.

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.

CHAPTER

2

Accessing Smart Orchestration

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

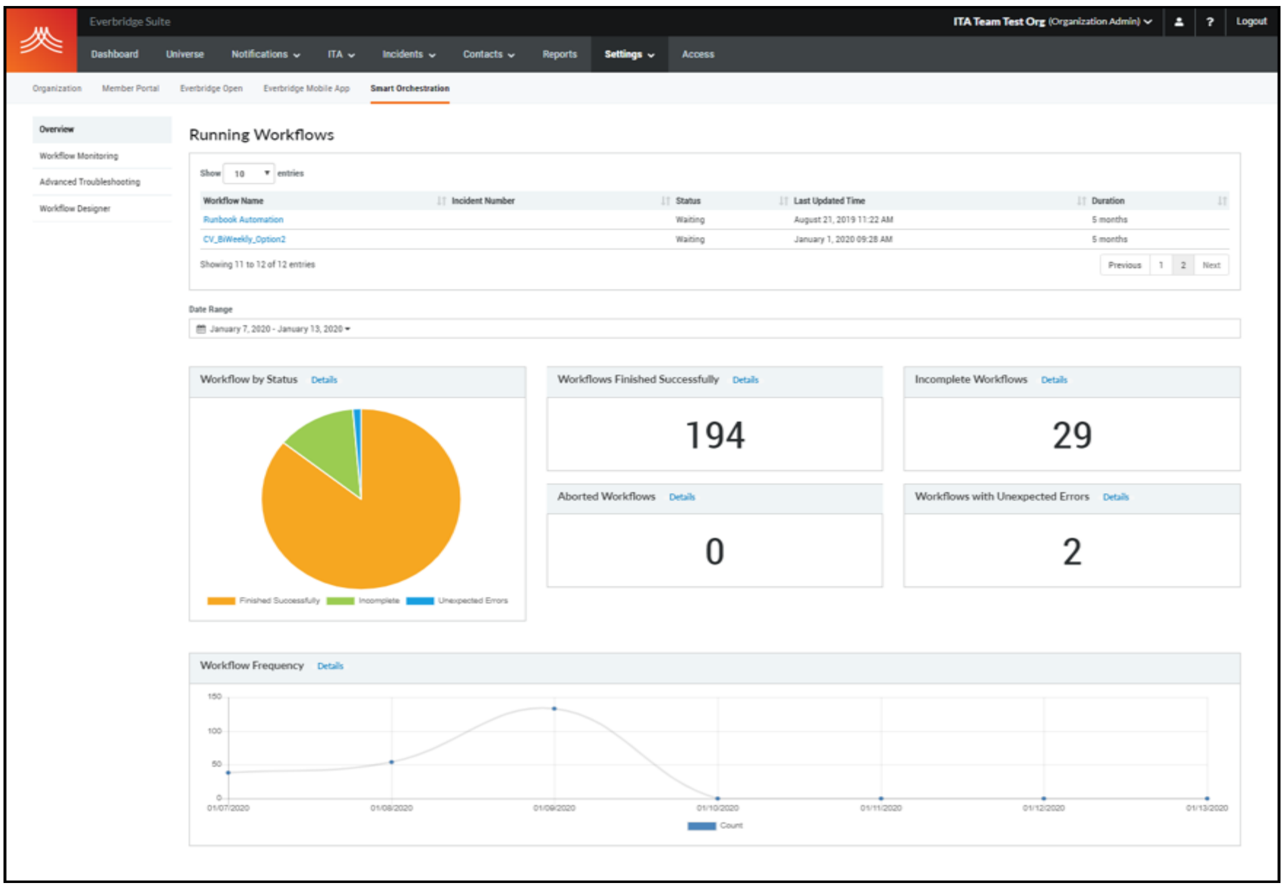
The following topics are covered:

- *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.

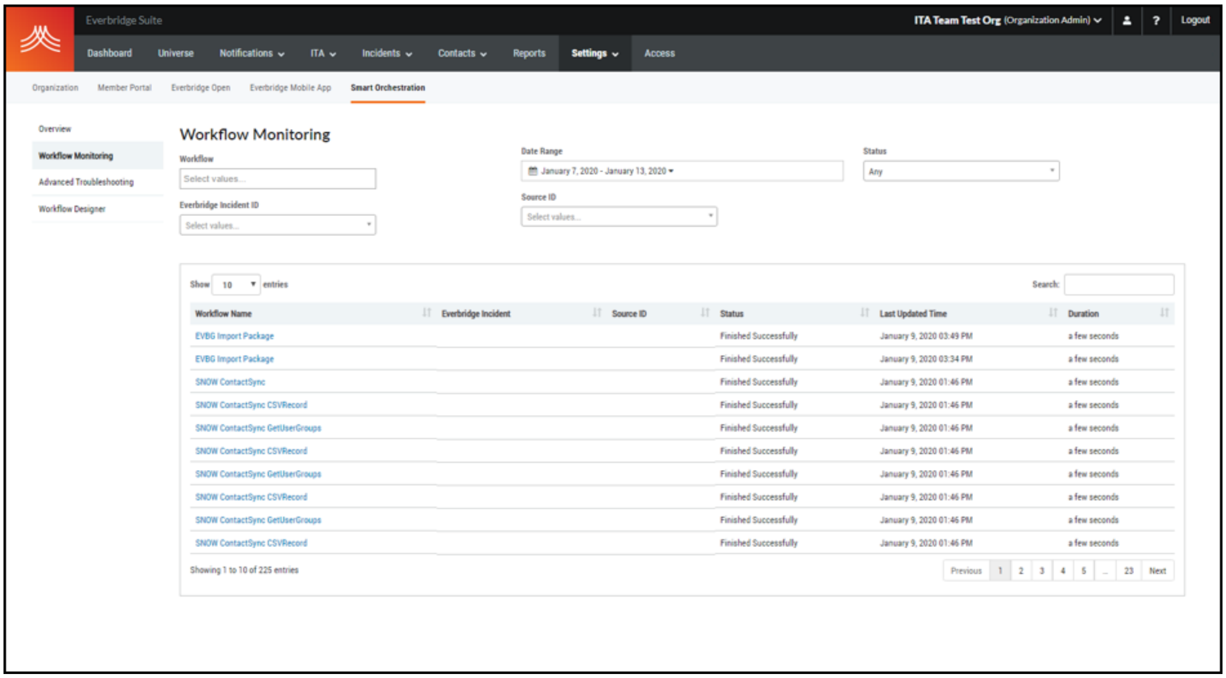
Click the Details button from any pane to see additional information.

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

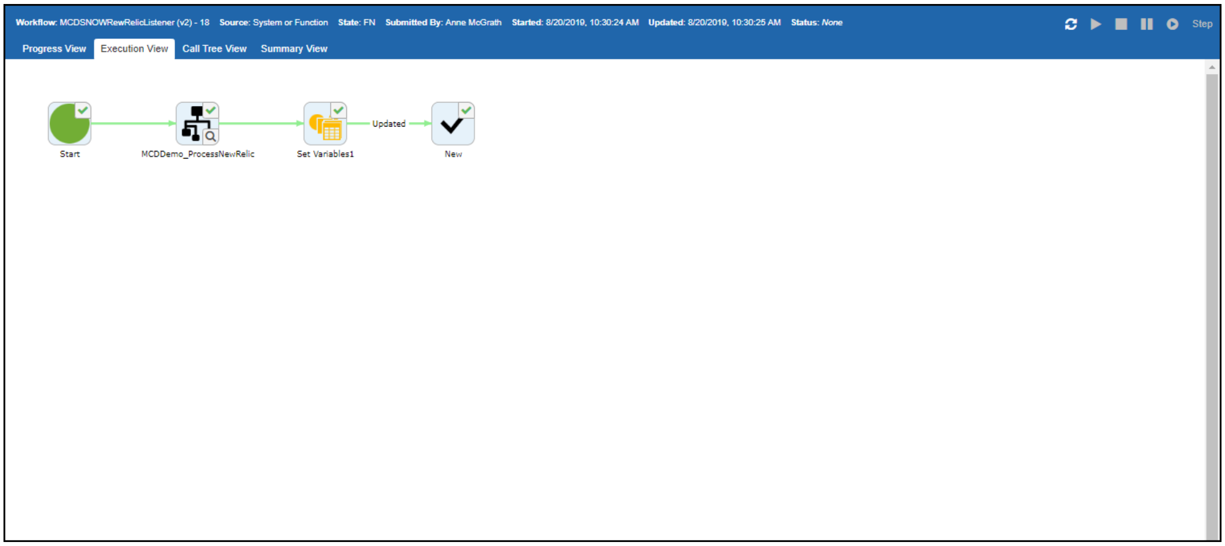
Monitoring Workflows

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.

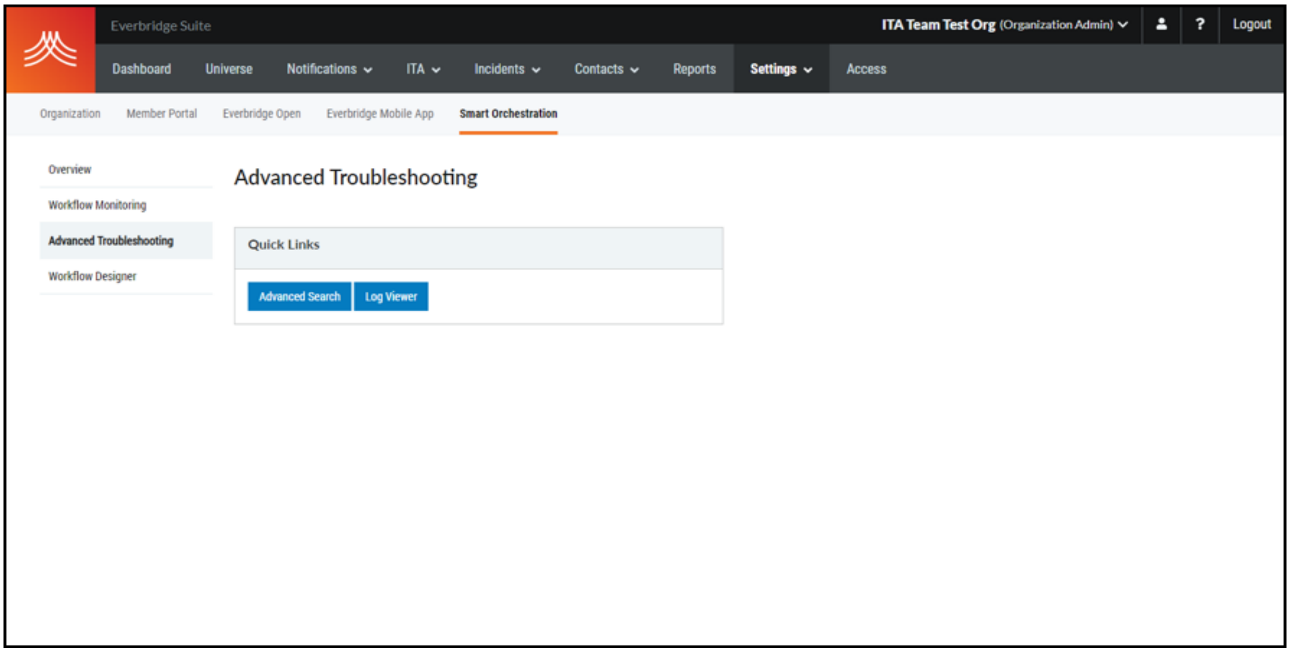


2 Drill down to the Execution View by selecting the Workflow Name, and selecting Execution View.



Advanced Troubleshooting

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

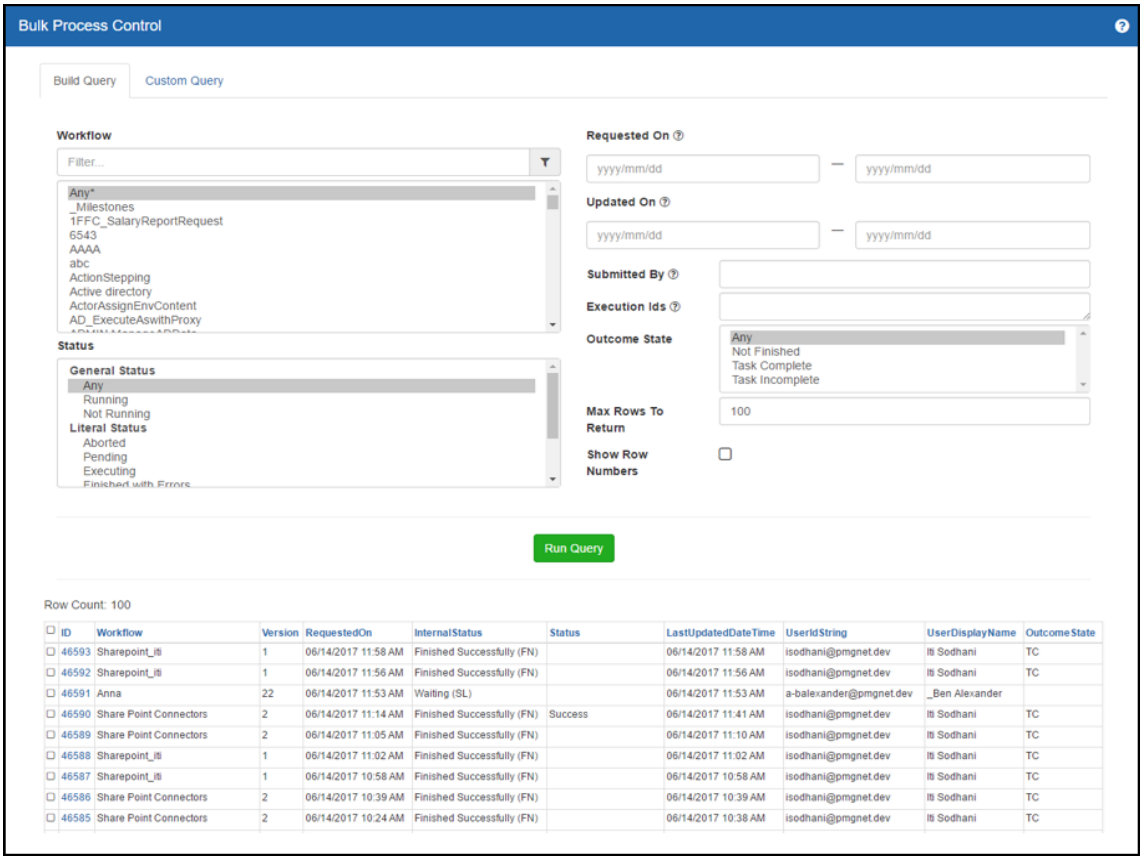


Advanced Search

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.



3. 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.

4. 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.)

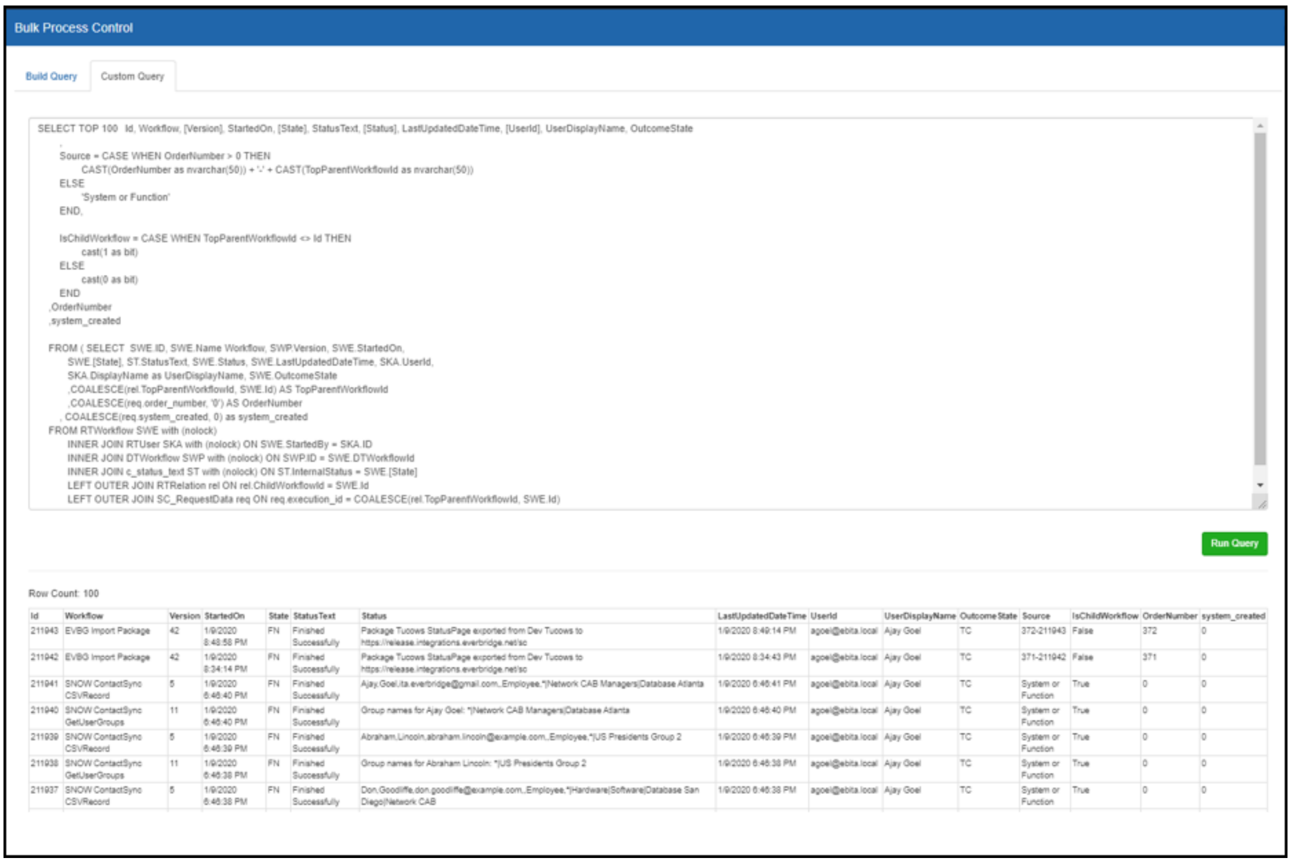
5. Look at the query results at the bottom portion of the screen. You are presented with the following information regarding the displayed workflows:
   - **ID**: Numeric ID of the workflow associated with a specific Request
   - **Workflow**: Name of the workflow
   - **Version**: Version of the workflow
   - **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.



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

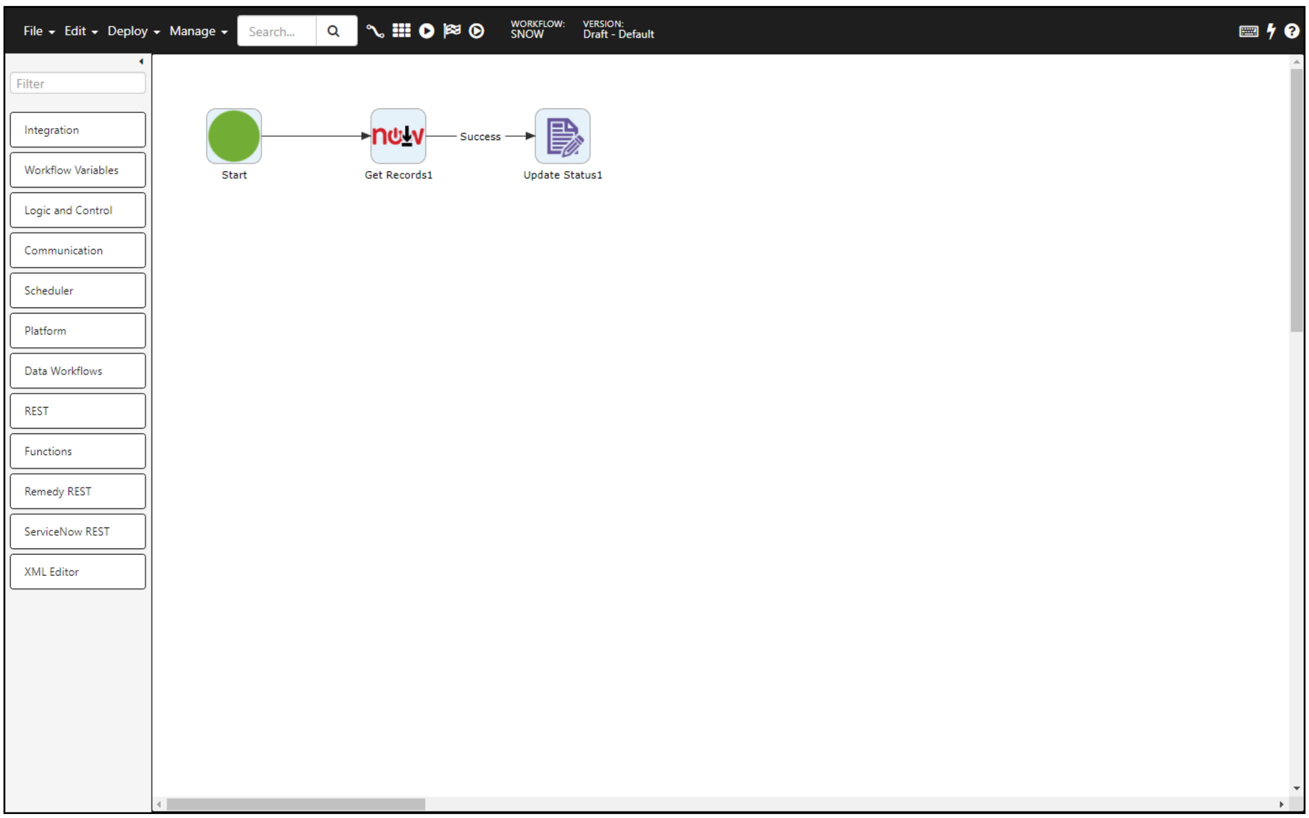
1. From the Settings tab, select Smart Orchestration > Advanced Troubleshooting > Log Viewer.
2. Select the corresponding tab to view log data.

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

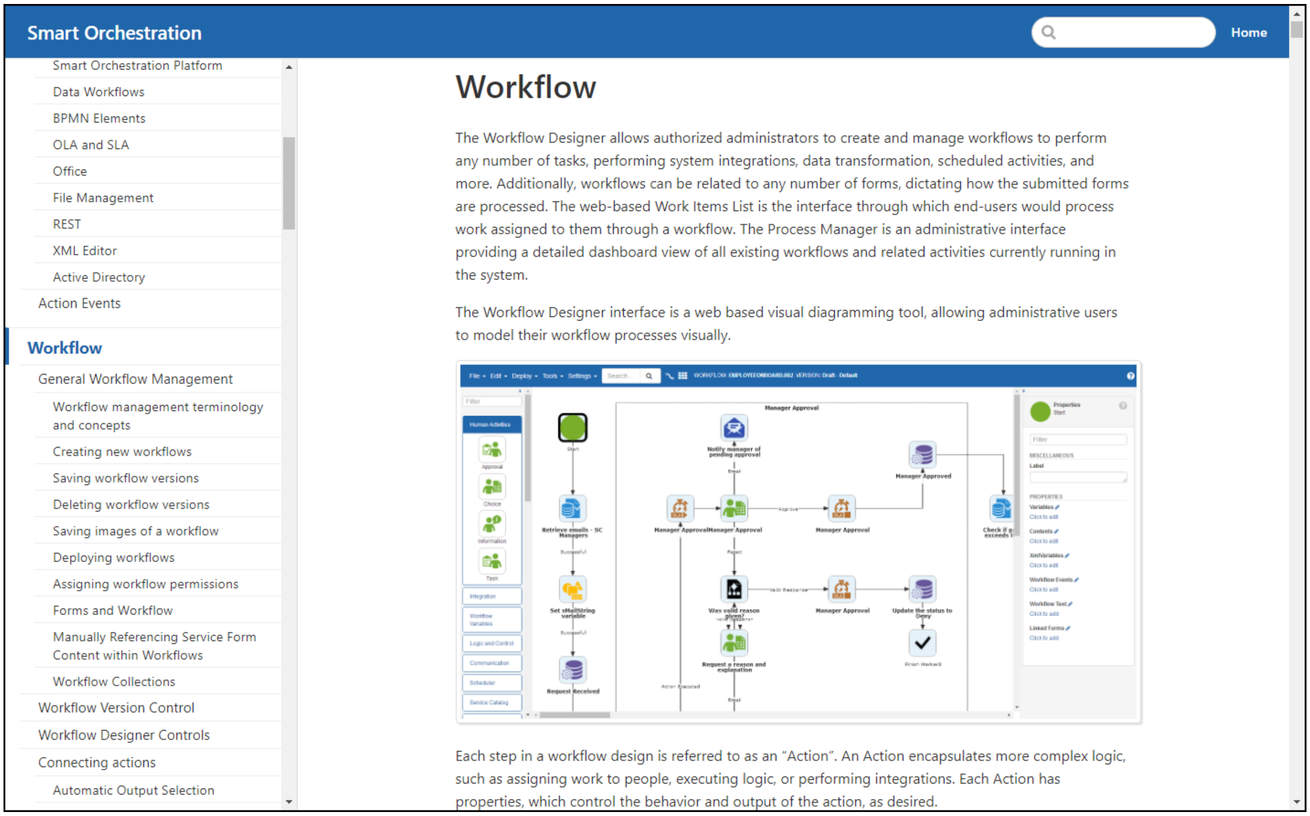
1 From the Settings tab, select Smart Orchestration > Workflow Designer.
The Workflow Designer opens in a new window.



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

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REST
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Action Events

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Creating new workflows
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Forms and Workflow
Manually Referencing Service Form Content within Workflows
Workflow Collections
Workflow Version Control
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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

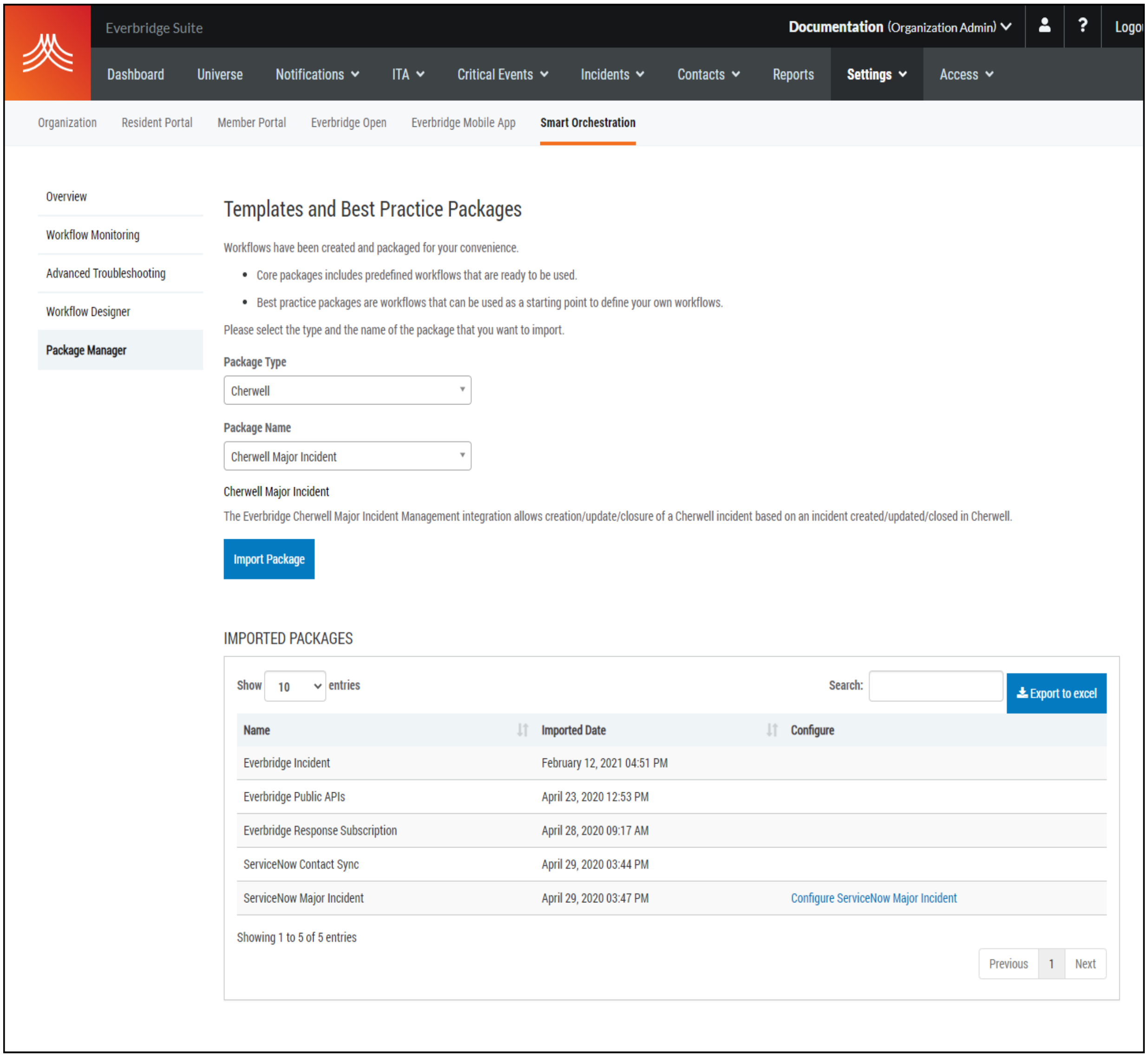
Use the Package Manager to install and import your own packages to define your workflows. The connectors are available on the CEM Connectors page. See: https://support.everbridge.com/connectors

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.



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.

C H A P T E R

3

Enabling Smart Orchestration in ITA

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

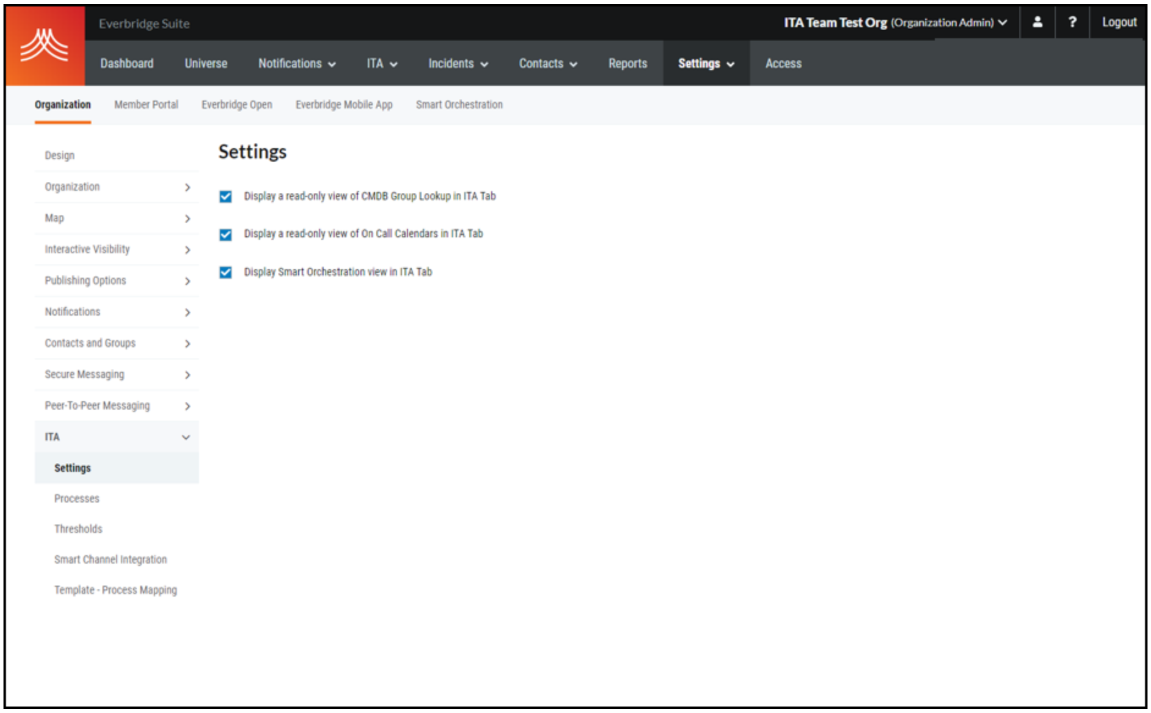
The following topics are covered:

◊ *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.

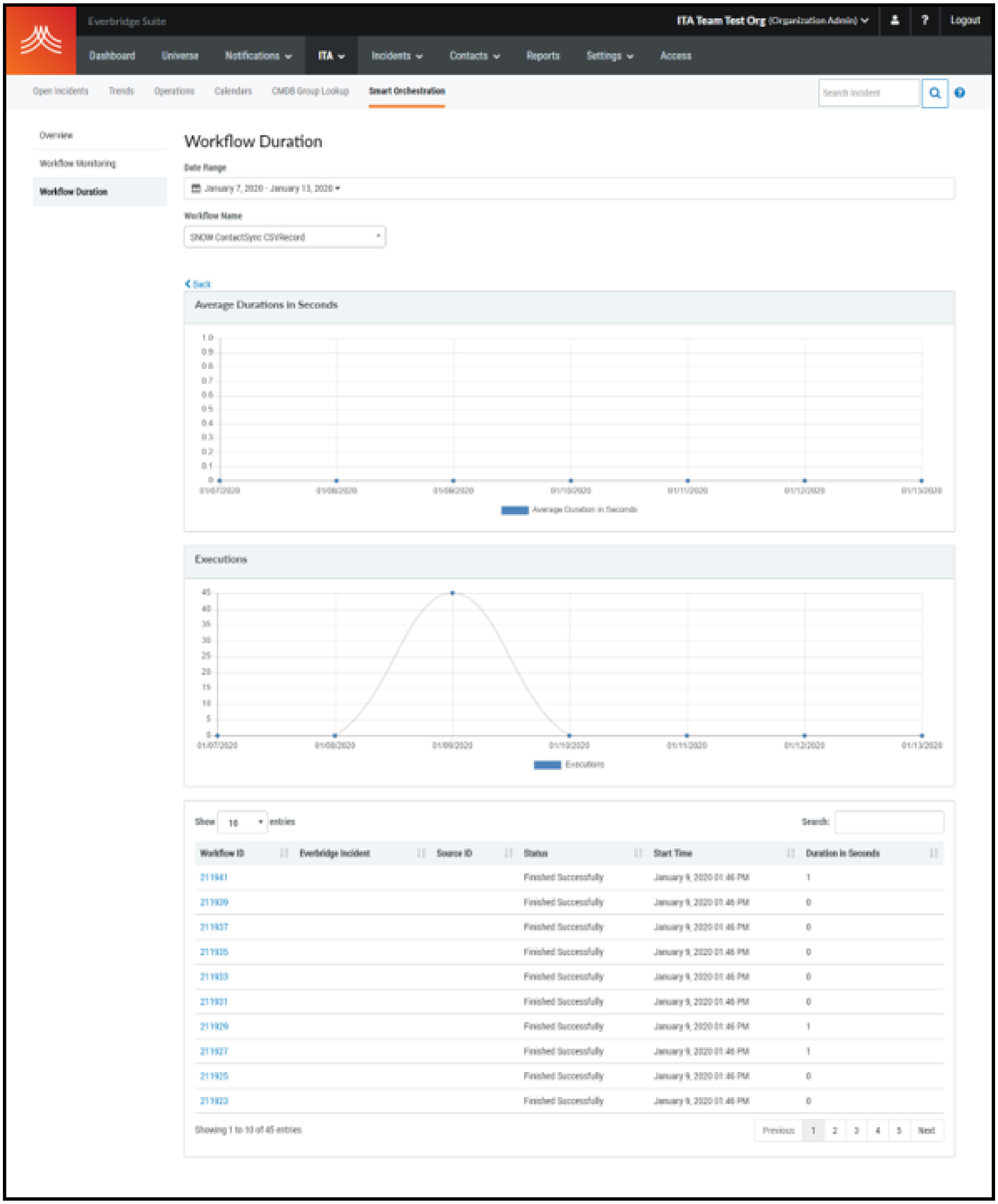


Selecting this option allows authorized users -- Incident Operators and Incident Administrators with proper Smart Orchestration permissions --to access the Smart Orchestration dashboards in a separate tab in the ITA dashboards.
From the ITA dashboards, you can access the Workflows Overview and the Workflow 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)
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CHAPTER

4

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

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

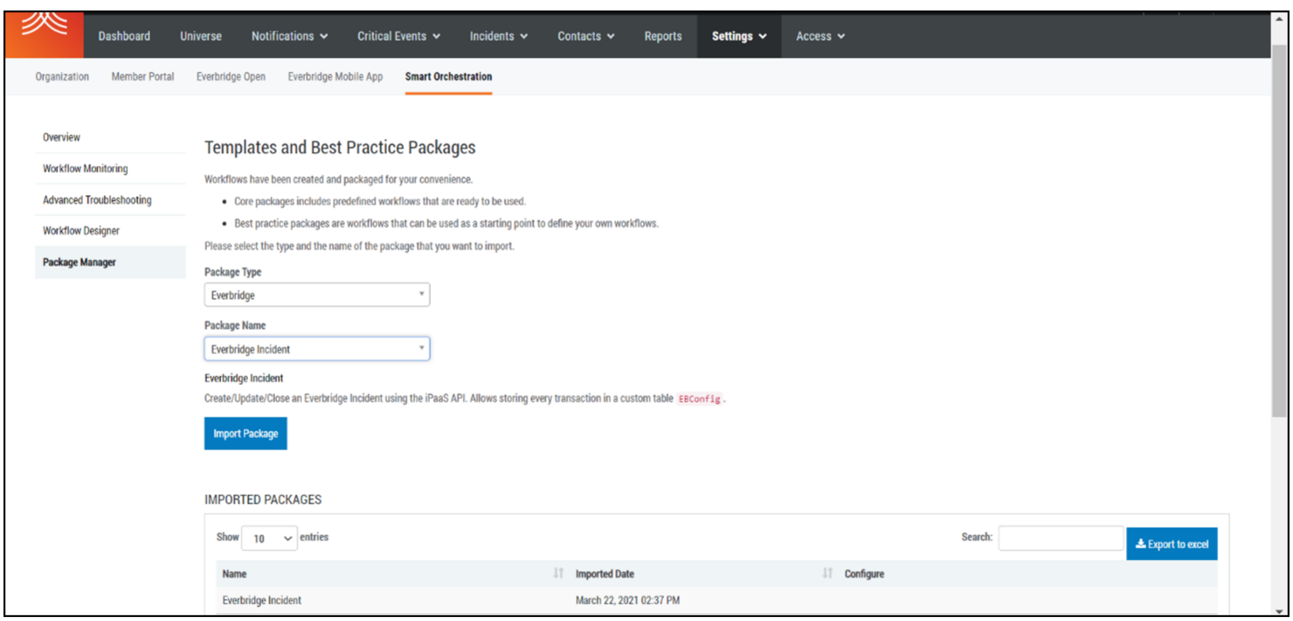
1. Ask your Everbridge representative to enable EB Open iPaaS for your account and organization.
   Your Everbridge representative enables your account and organization for iPaaS.
2. For usage with Smart Orchestration, choose API for your integration.

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=a4N340000002XfQEAU).

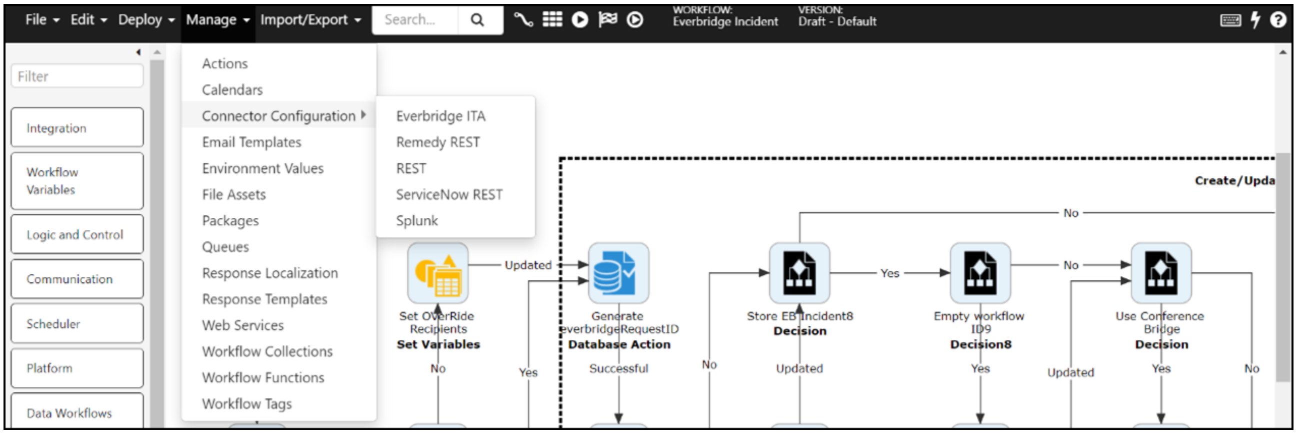
Smart Orchestration Configuration for iPaaS

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



To import the Everbridge Incident Package

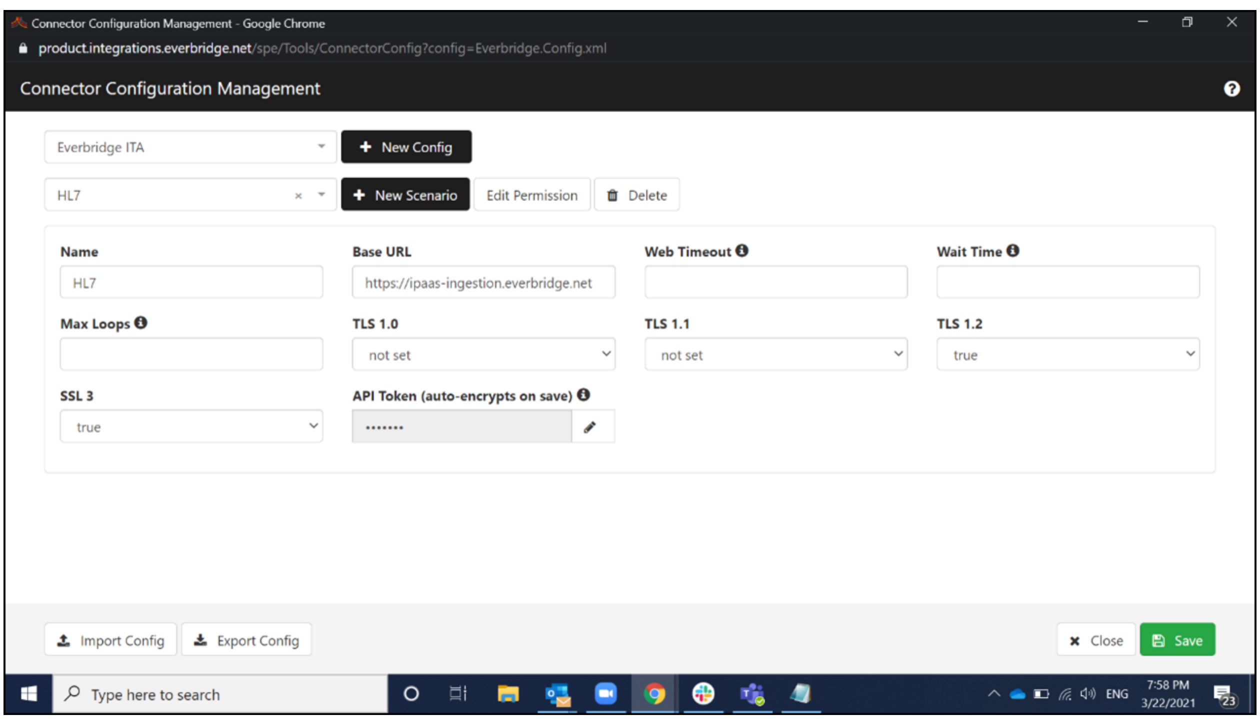
1 In Workflow Designer, from the Manage menu, select Connector Configuration > Everbridge ITA.



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:

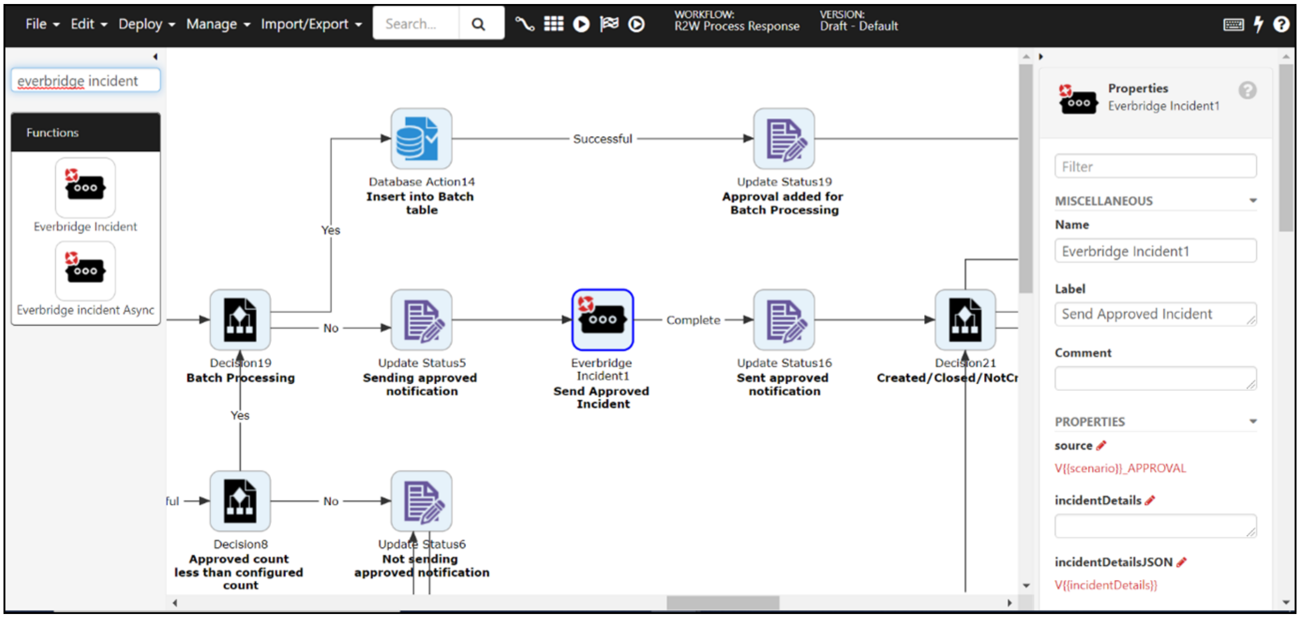
```
{
    "contactType": "ID",
    "contacts": [
      "string"
    ],
    "groupType": "ID",
    "groups": [
      "string"
    ]
  }
```

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 iPaaSError—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.

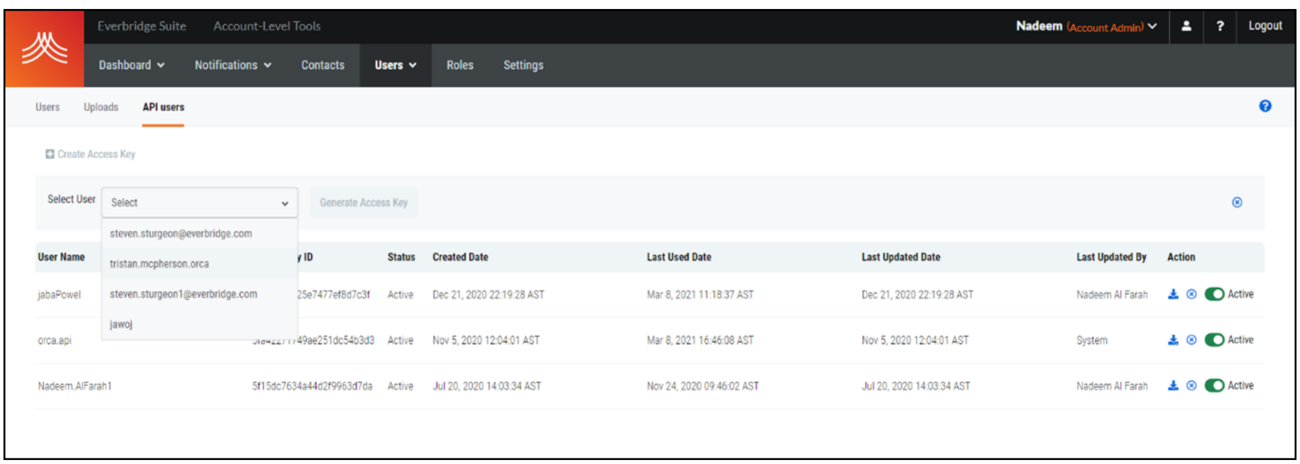
Documentation: https://support.everbridge.com/articles/Documentation/REST-Application-Programming-Interface-Guide

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

REST API User Configuration

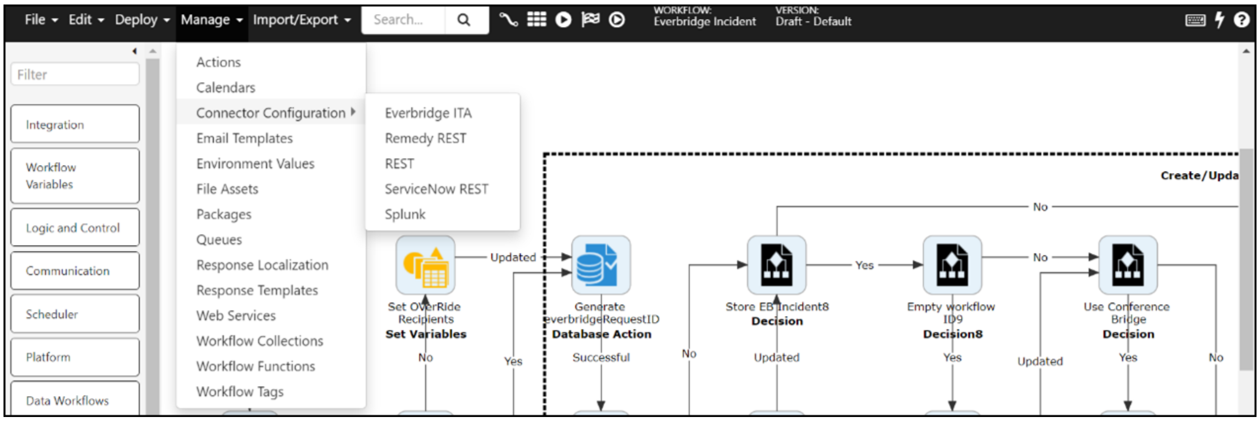
To configure a REST API User

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.



To use the Everbridge REST API in Smart Orchestration

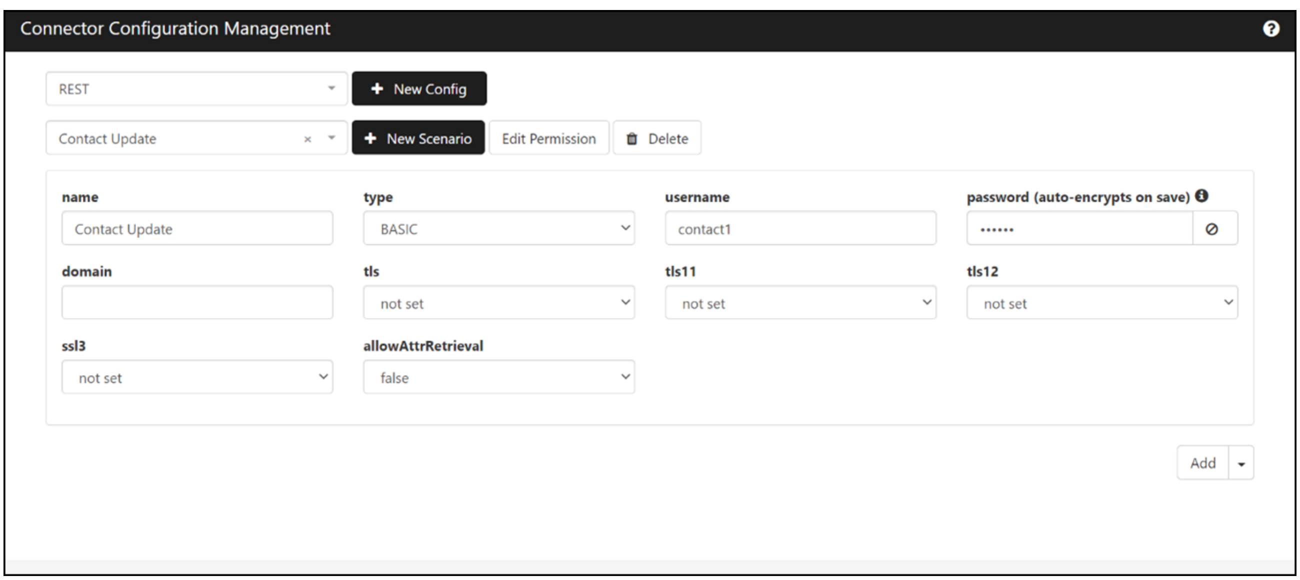
1 In Workflow Designer, from the Manage menu, select Connector Configuration > REST.



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 configuraiton:

- 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.