Table of Contents:

Summary

The purpose of this lab is to get you started with managing incidents using incident.io.
We are using Slack and incident.io.

Goal and Outcome of the Lab

By the end of this lab, we want everyone to understand how to create, manage and learn from incidents using incident.io.

Prerequisites

- Create accounts on incident.io and Slack
    - https://app.incident.io/setup
    - https://slack.com/intl/en-gb/get-started#/createnew

Part One: Install incident.io to your Slack workspace

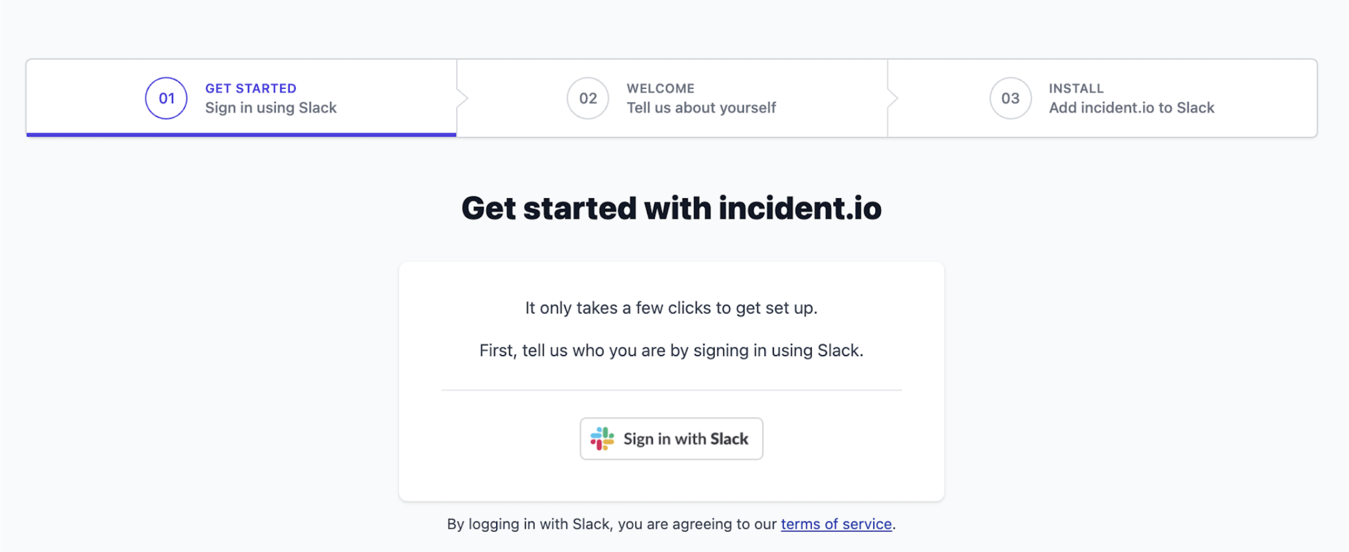
There are just **3 steps**:

1. Sign Up (via Slack)
2. Select your integrations
3. Add incident.io to Slack

Note: you will need a Slack admin to install us due to Slack's permissions model.

1. Sign Up (via Slack)

From the sign-up page, you'll be asked to '*Sign in with Slack*'.



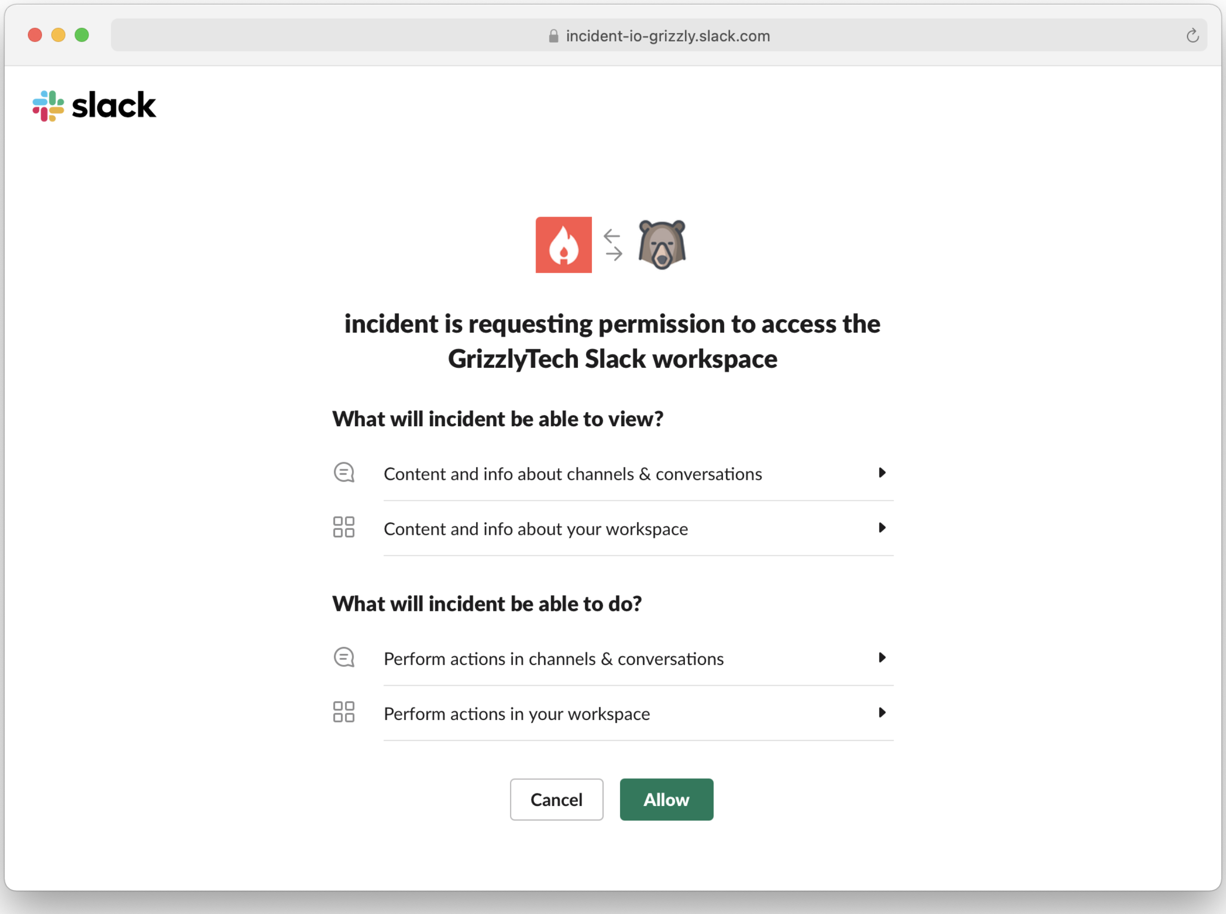
Get started with incident.io

It only takes a few clicks to get set up.

First, tell us who you are by signing in using Slack.

By logging in with Slack, you are agreeing to our terms of service.

We'll create an account for you and store some basic information, like your name and avatar. We'll also ask for a restricted set of permissions in order for incident.io to work. Read more in our Security FAQs.



incident-io-grizzly.slack.com

slack

incident is requesting permission to access the GrizzlyTech Slack workspace

What will incident be able to view?

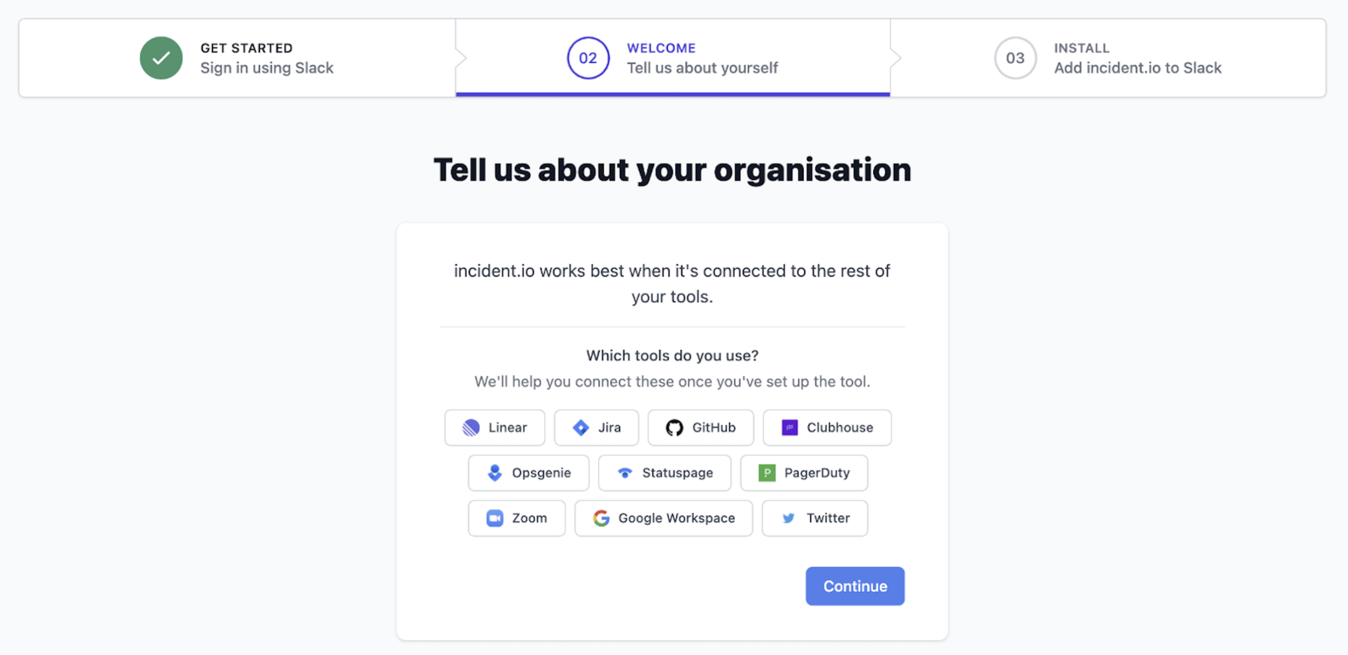
- Content and info about channels & conversations
- Content and info about your workspace

What will incident be able to do?

- Perform actions in channels & conversations
- Perform actions in your workspace

2. Select your integrations

This is just so we get a sense of the most-used tools in our user base. We explain how to set up your integrations ➡️ here.



Tell us about your organisation

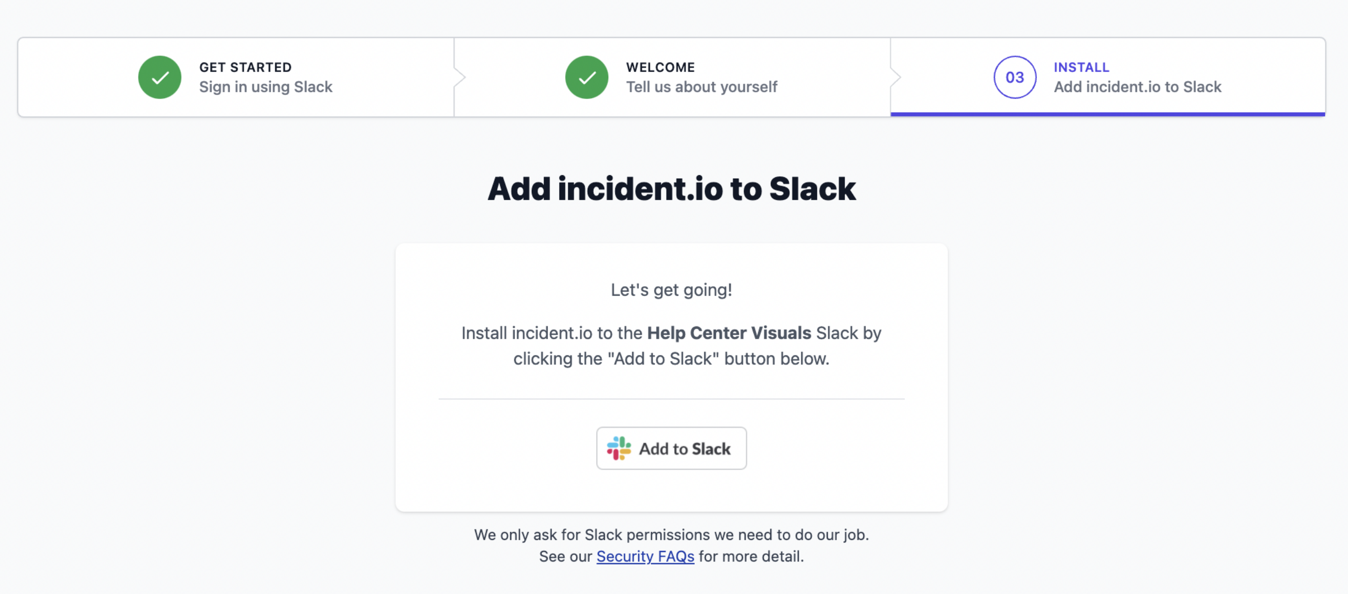
incident.io works best when it's connected to the rest of your tools.

Which tools do you use?

We'll help you connect these once you've set up the tool.

3. Add incident.io to Slack

Last step: '*Add incident.io to Slack*'.



Add incident.io to Slack

Let's get going!

Install incident.io to the **Help Center Visuals** Slack by clicking the "Add to Slack" button below.

We only ask for Slack permissions we need to do our job.
See our Security FAQs for more detail.

When you've done this, we'll create you an #incidents channel, and install the incident.io app into your workspace.
...all done! ⚡

Everyone in your Slack workspace can now use incident.io — they simply need to go through the same '*Login with Slack*' flow. They will not be asked to '*Add incident.io to Slack*' -

that step only happens once.

Let's go declare an incident!

Part two: Declaring your first incident

Something has gone wrong, and we need to respond! 🧯

There are two ways to kick off a real incident (you can create test incidents if you want to run experiments and do dry runs without affecting production incidents!).

1. Use /incident (or /inc)

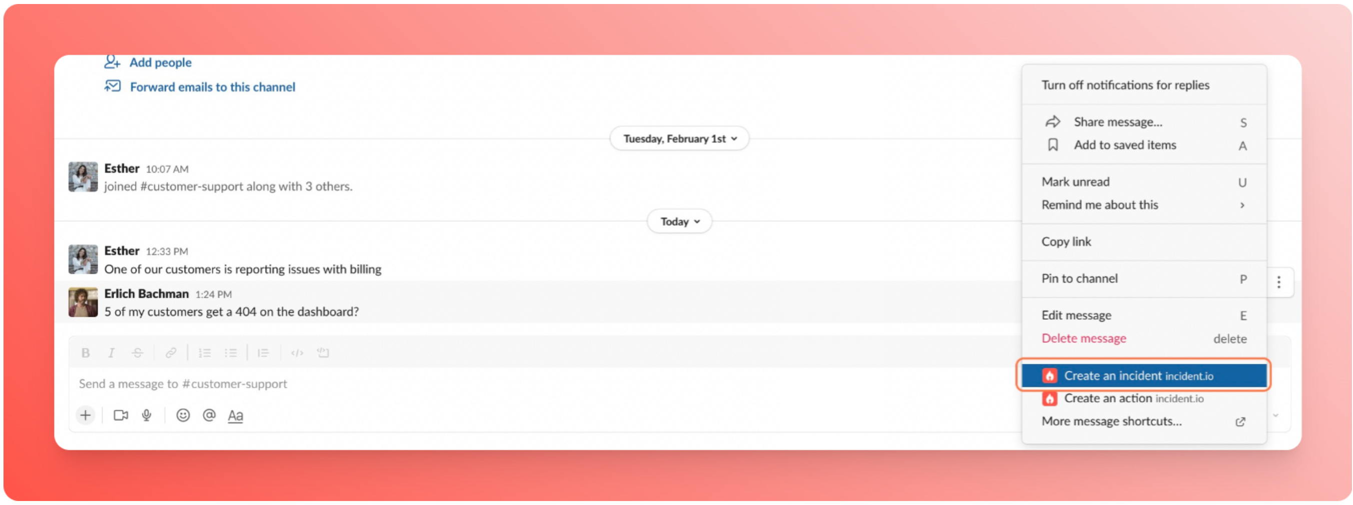
From any channel in Slack, typing /inc or /incident and hitting Enter will pop up the incident creation form.

💡 Tooltips

- If you know your incident's title/summary, you can type extra text directly at the end of the /incident to pre-fill the incident form's "*What's going on?*" field (e.g. /inc Website is down)
- Using /incident in a dedicated incident channel (the #inc-... ones) won't declare an incident, but instead will open up a menu of actions on that specific incident (e.g. change the severity, update the Statuspage etc.).

2. Turn a message into an incident

You just need to hit the three built-in dots on a Slack message and click 'Create an incident' 👇🏼 (we explain how to do this in-depth).



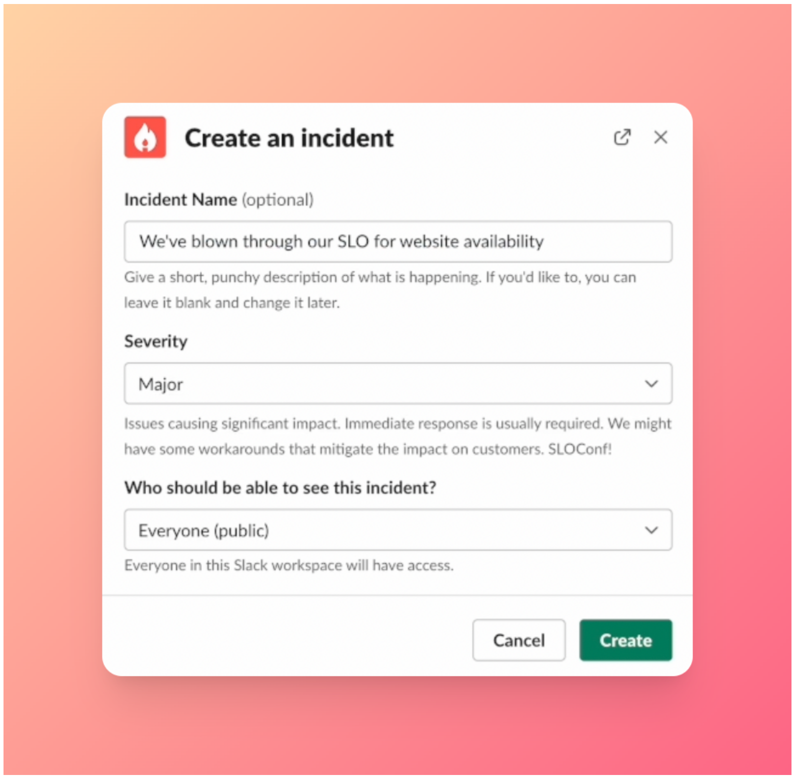
Add people
Forward emails to this channel
Tuesday, February 1st
Today
Turn off notifications for replies
Share message... S
Add to saved items A
Mark unread U
Remind me about this ›
Copy link
Pin to channel P
Edit message E
Delete message delete
Create an incident incident.io
Create an action incident.io
More message shortcuts...
B I
Send a message to #customer-support
Aa

Esther 10:07 AM
joined #customer-support along with 3 others.

Esther 12:33 PM
One of our customers is reporting issues with billing

Erlich Bachman 1:24 PM
5 of my customers get a 404 on the dashboard?

Regardless of which method you choose, we'll trigger a form asking for some basic information about the incident - all totally customisable!



Create an incident

Incident Name (optional)

We've blown through our SLO for website availability

Give a short, punchy description of what is happening. If you'd like to, you can leave it blank and change it later.

Severity

Major

Issues causing significant impact. Immediate response is usually required. We might have some workarounds that mitigate the impact on customers. SLOConf!

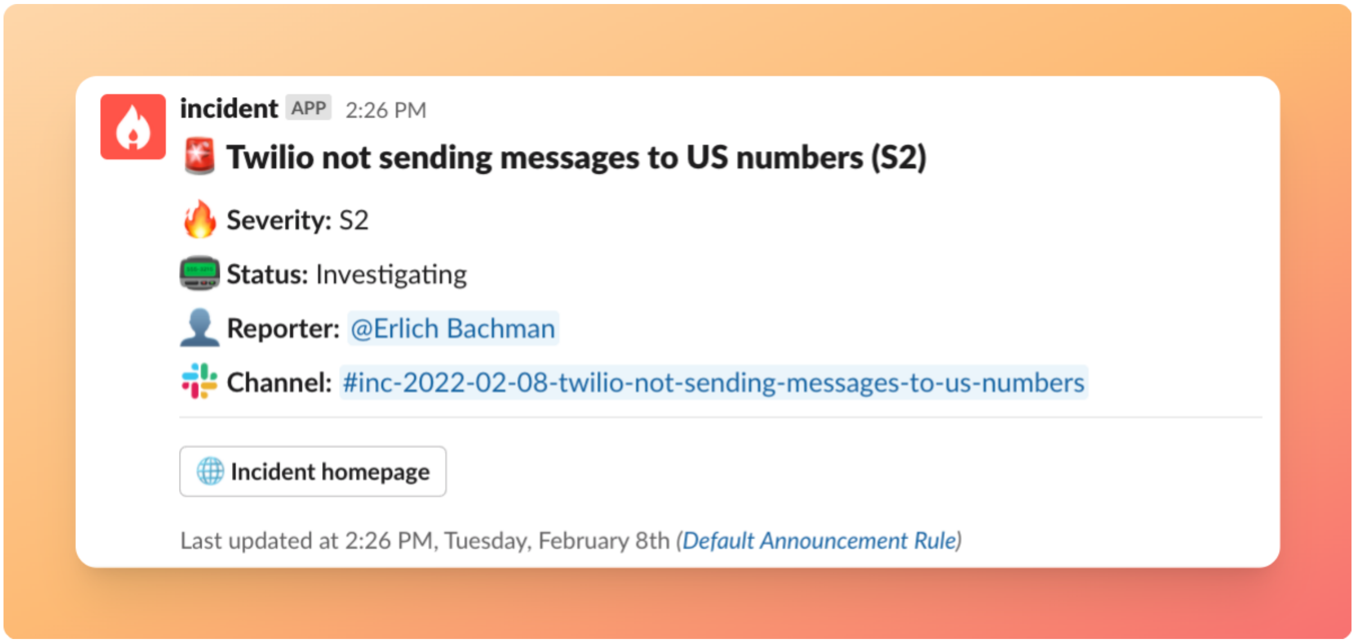
Who should be able to see this incident?

Everyone (public)

Everyone in this Slack workspace will have access.

💡 *In the heat of the moment, you don't even need to fill out the form before hitting Create: by default, we'll kick off a low-severity incident with a randomly generated name (both the name* *and severity are easy to change later via /inc rename and /inc update).*

We'll also tell your team about the new incident via the incident announcements channel (#incidents by default, but you can change the announcement rules).



incident APP 2:26 PM

🚨 **Twilio not sending messages to US numbers (S2)**

🔥 **Severity:** S2

📟 **Status:** Investigating

👤 **Reporter:** @Erlich Bachman

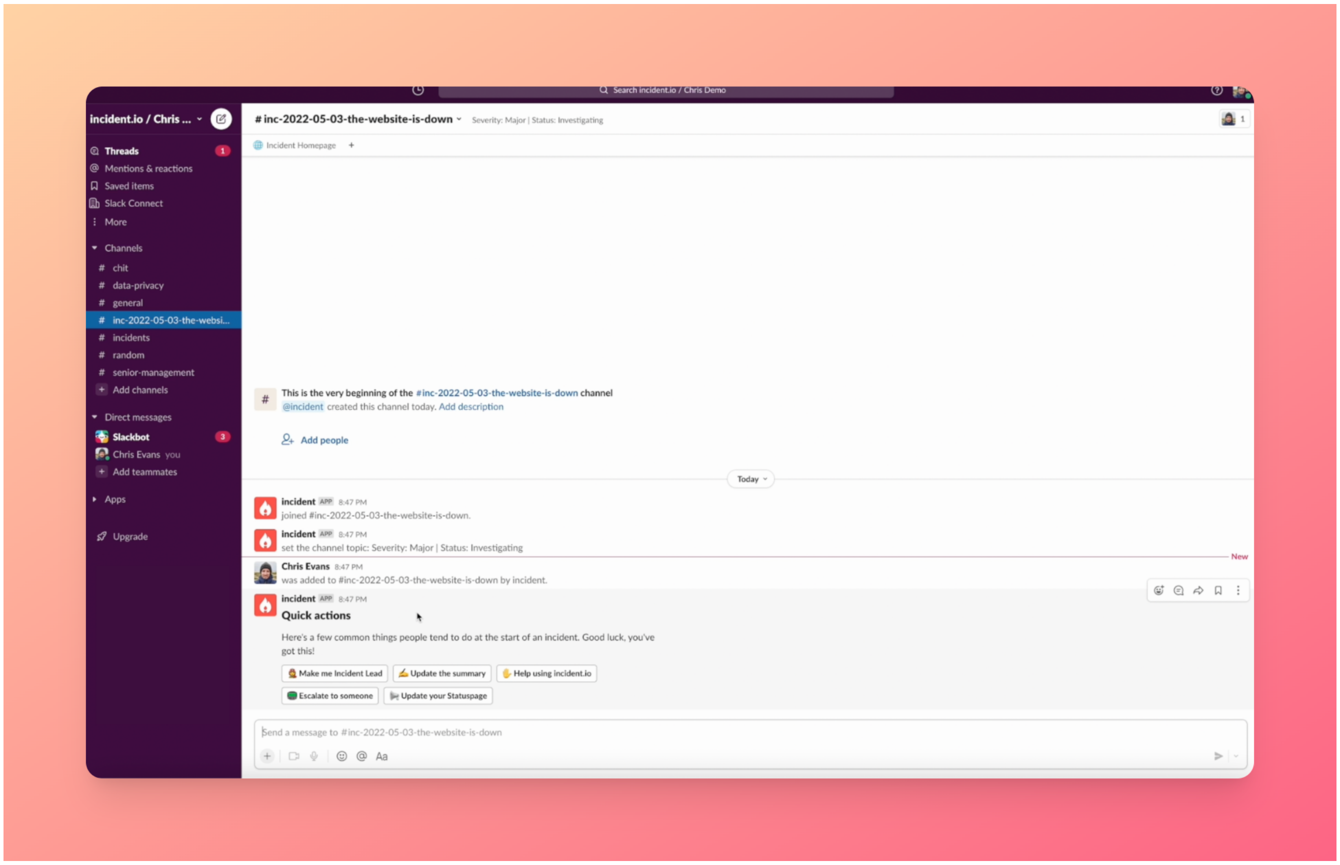
Channel: #inc-2022-02-08-twilio-not-sending-messages-to-us-numbers

Last updated at 2:26 PM, Tuesday, February 8th (*Default Announcement Rule*)

Ready to rumble! 👩‍🚒

Part three: Managing ongoing incidents

Once you declare an incident, we will automatically create a dedicated Slack channel with an attached call link for it - your digital war room. Anything you have to do, you can do straight from here, it’s already integrated with your monitoring and ticketing tools.



inc-2022-05-03-the-website-is-down Severity: Major | Status: Investigating

This is the very beginning of the #inc-2022-05-03-the-website-is-down channel
@incident created this channel today. Add description

incident APP 8:47 PM
joined #inc-2022-05-03-the-website-is-down.

incident APP 8:47 PM
set the channel topic: Severity: Major | Status: Investigating

Chris Evans 8:47 PM
was added to #inc-2022-05-03-the-website-is-down by incident.

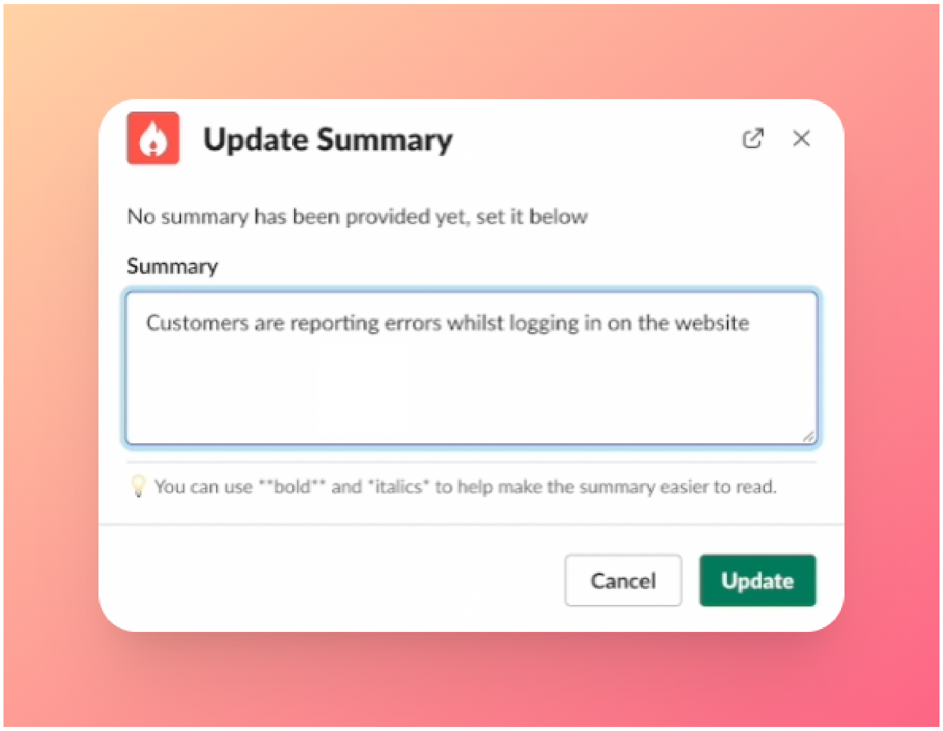
incident APP 8:47 PM
Quick actions

Here's a few common things people tend to do at the start of an incident. Good luck, you've got this!

Provide an incident summary

Next, you'll need to provide a quick summary of your incident, so that when people join the channel, they'll know exactly what's going on. We'll also pop this message into the general #incidents channel, so that your team will know at a glance what's happening.

💡 You can page people for help directly from this channel with one click. Just type /incident in the dedicated incident channel and type escalate. We'll notify and call them in for help via PagerDuty or Opsgenie straight to their email and phone. We'll let you know right here if and when they've acknowledged the notification and they'll automatically be added to the dedicated incident channel.



No summary has been provided yet, set it below

Summary

Customers are reporting errors whilst logging in on the website

💡 You can use **bold** and *italics* to help make the summary easier to read.

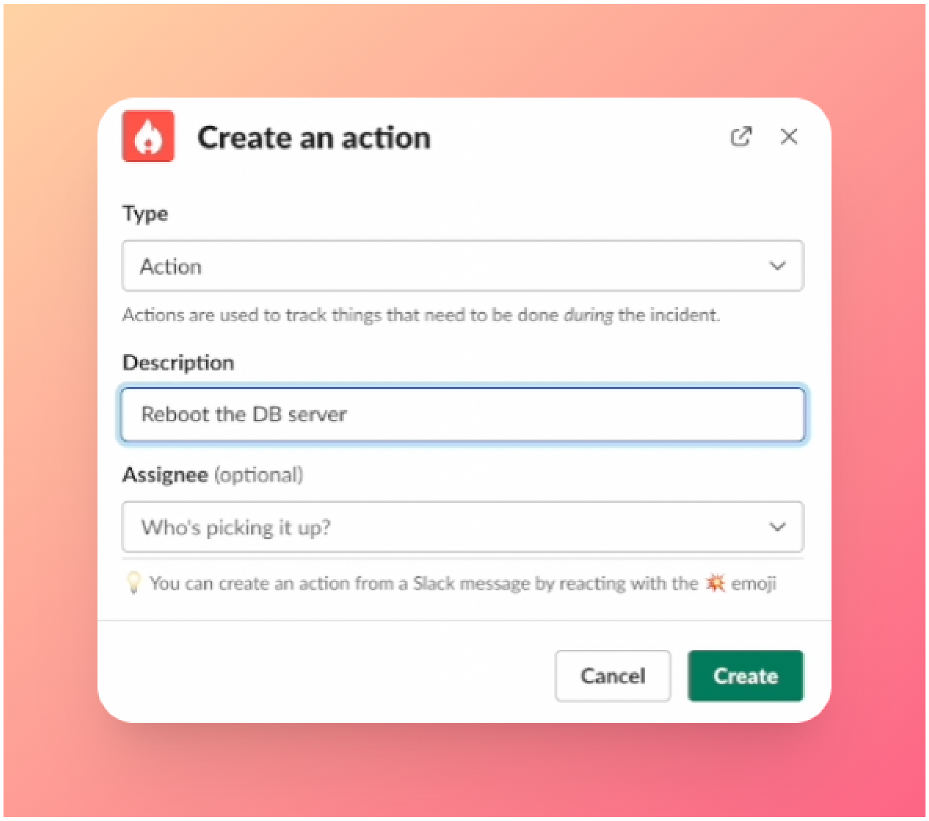
Now, let’s fix the issue!

Create actions

Within the dedicated incident channel, you can type /incident at any time and this will bring up a set of options. You can quick search by typing what you want to do in the search bar. Let’s say you have an idea on what should be done next and you want to create an action item. Just type “action” into the search box and create a new action.

Assign roles to actions

You can assign and pick up tasks within the Slack channel. We’ll announce it in the channel whenever a task has been picked up, so that it’s very clear who’s doing what.



Create an action

Type

Action

Actions are used to track things that need to be done *during* the incident.

Description

Reboot the DB server

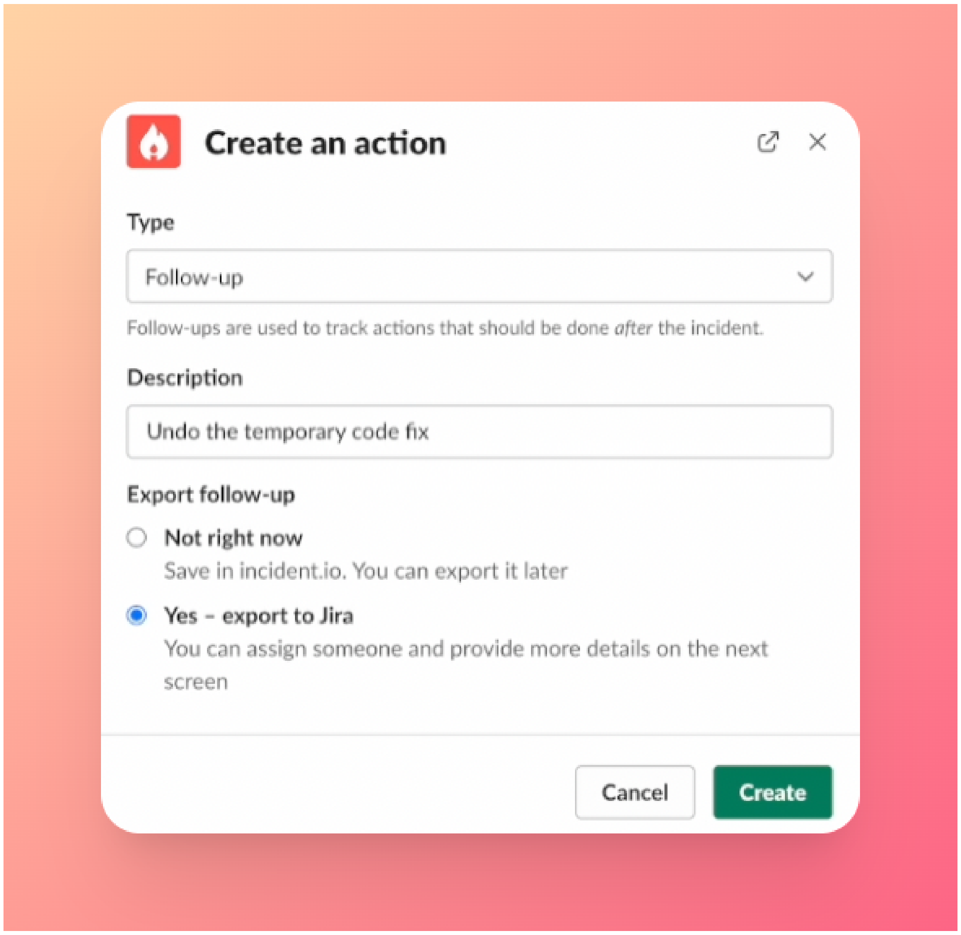
Assignee (optional)

Who's picking it up?

💡 You can create an action from a Slack message by reacting with the 💥 emoji

Create follow-ups

Within the actions command, you can also create follow-up actions for this incident, that will automatically be exported to Jira or Linear, so that you can, for example, undo any temporary fixes that need to be cleaned up after.



Create an action

Type

Follow-up

Follow-ups are used to track actions that should be done *after* the incident.

Description

Undo the temporary code fix

Export follow-up

○ Not right now

Save in incident.io. You can export it later

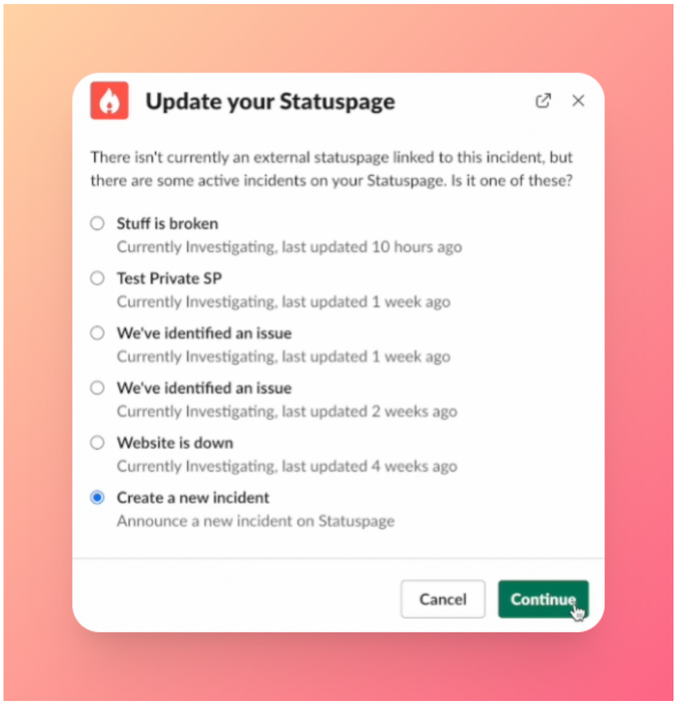
● Yes - export to Jira

You can assign someone and provide more details on the next screen

💡 *You can pin important changes and messages to your incident timeline simply by reacting to them with a pushpin emoji 📌 in the Slack channel.*

Let your customers know what's going on and that you're working on fixing it

As this incident has already affected some of your customers, you might want to let them know what's going on. You can update your public status page and/or post on Twitter straight from the incident Slack channel - it will only take you 10 seconds.



Update your Statuspage

There isn't currently an external statuspage linked to this incident, but there are some active incidents on your Statuspage. Is it one of these?

○ Stuff is broken
Currently Investigating, last updated 10 hours ago

○ Test Private SP
Currently Investigating, last updated 1 week ago

○ We've identified an issue
Currently Investigating, last updated 1 week ago

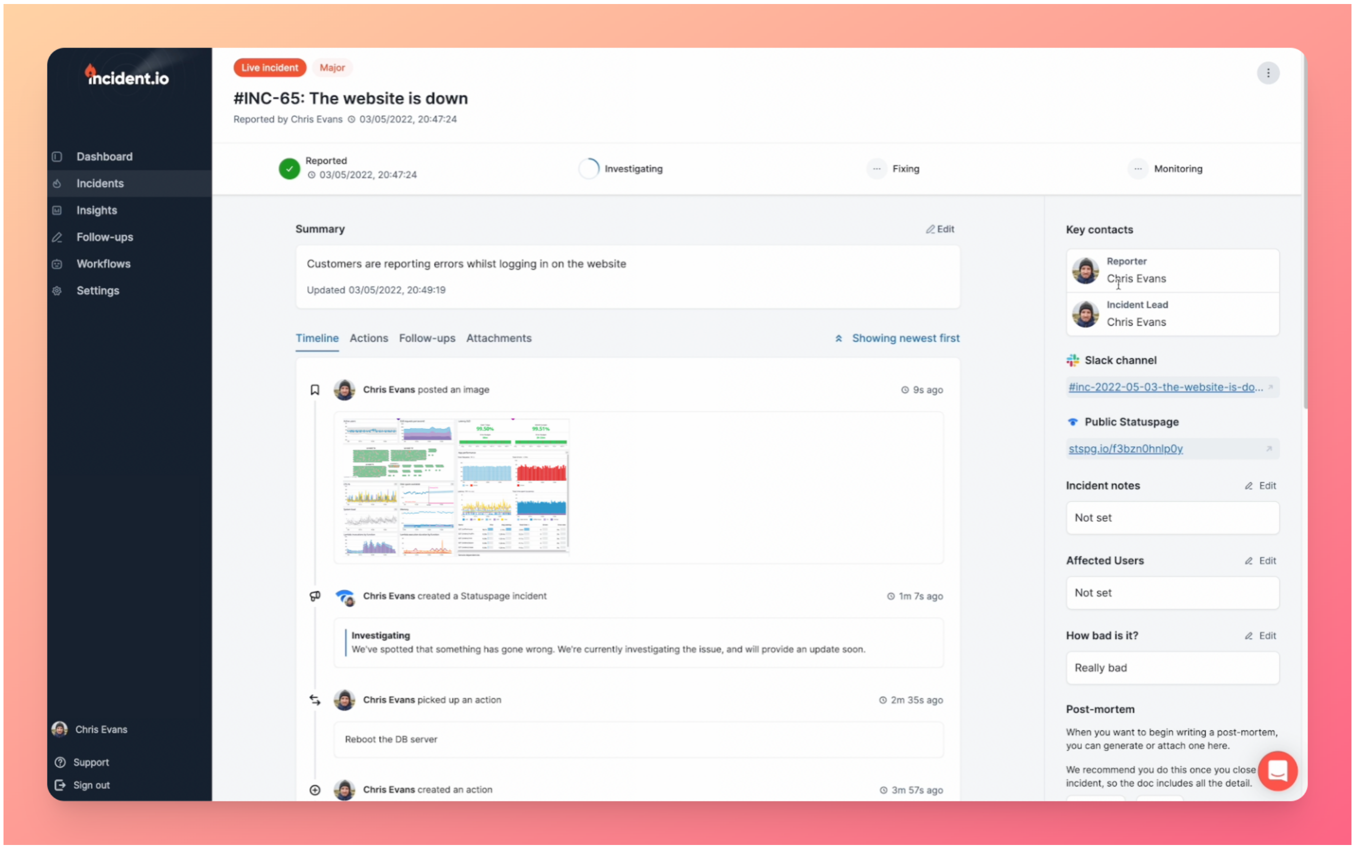
○ We've identified an issue
Currently Investigating, last updated 2 weeks ago

○ Website is down
Currently Investigating, last updated 4 weeks ago

● Create a new incident
Announce a new incident on Statuspage

Keep your team and key stakeholders in the loop

In addition to being able to monitor the live incident channel, you are also able to get a quick real-time overview of the incident timeline on the incident.io web-app dashboard.



#INC-65: The website is down

Reported by Chris Evans 03/05/2022, 20:47:24

Reported 03/05/2022, 20:47:24 · Investigating · Fixing · Monitoring

Summary

Customers are reporting errors whilst logging in on the website

Updated 03/05/2022, 20:49:19

Chris Evans posted an image — 9s ago

Chris Evans created a Statuspage incident — 1m 7s ago

Investigating
We've spotted that something has gone wrong. We're currently investigating the issue, and will provide an update soon.

Chris Evans picked up an action — 2m 35s ago

Reboot the DB server

Chris Evans created an action — 3m 57s ago

Key contacts

Reporter: Chris Evans

Incident Lead: Chris Evans

Slack channel: #inc-2022-05-03-the-website-is-do...

Public Statuspage: stspg.io/f3bzn0hnlp0y

Incident notes: Not set

Affected Users: Not set

How bad is it?: Really bad

Post-mortem

When you want to begin writing a post-mortem, you can generate or attach one here.

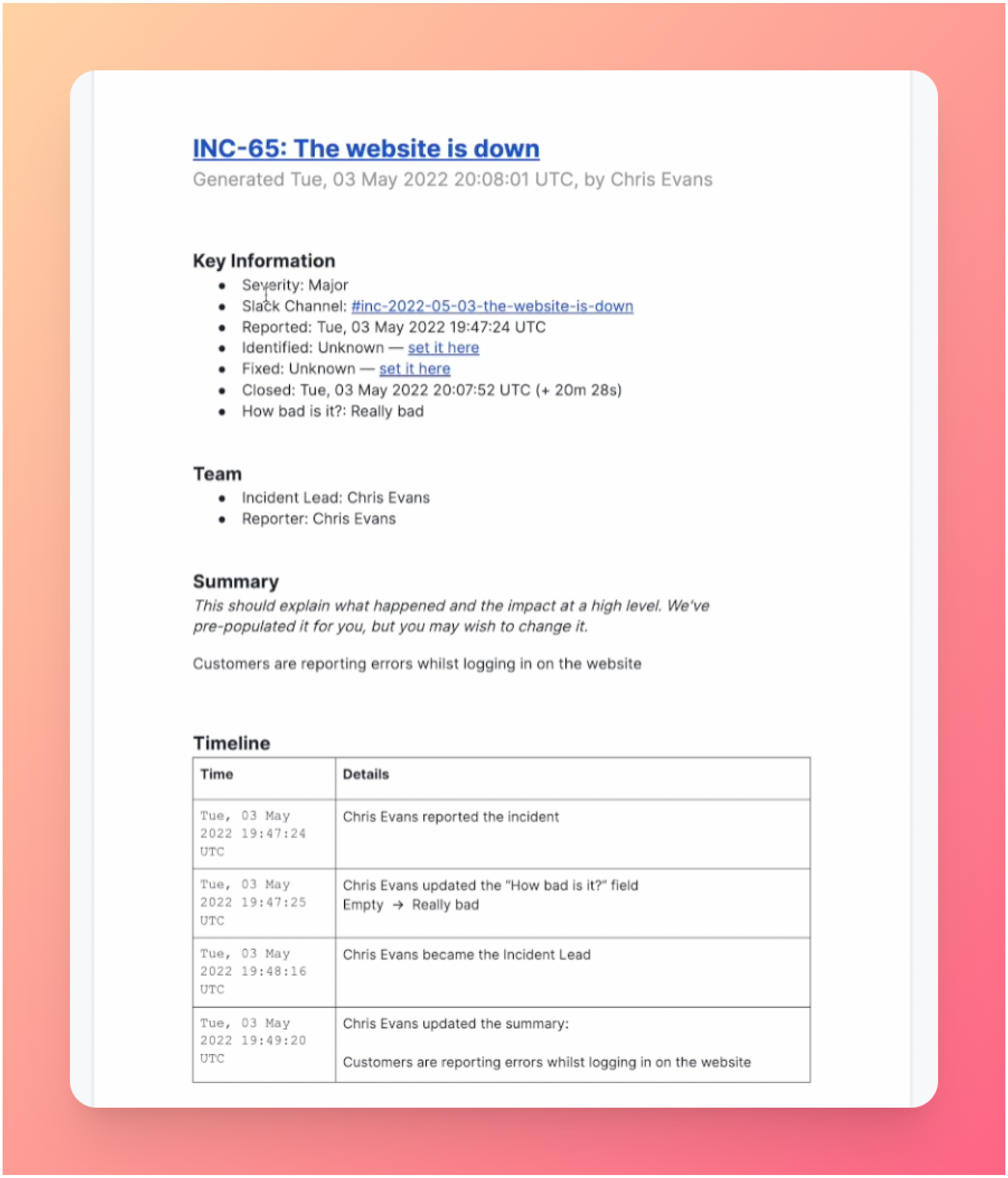
We recommend you do this once you close incident, so the doc includes all the detail.

💡 *incident.io allows you to automate your incident response process. With incident workflows, you can trigger a certain set of actions, for example, email/sms executives when there's a critical incident, prompt a decision flow when there's an assumed security breach incident or update a status page automatically when the incident summary is updated.*

Part four: Closing the incident

Once you're done fixing the issue and everything is looking good, you can close the incident straight from the Slack channel or the incident.io web app.

Now that the incident is closed, you can generate a post-mortem document in the web app by simply clicking a button. You can easily export the post-mortem to, for example, Google Docs or Confluence.



INC-65: The website is down

Generated Tue, 03 May 2022 20:08:01 UTC, by Chris Evans

Key Information

- Severity: Major
- Slack Channel: #inc-2022-05-03-the-website-is-down
- Reported: Tue, 03 May 2022 19:47:24 UTC
- Identified: Unknown — set it here
- Fixed: Unknown — set it here
- Closed: Tue, 03 May 2022 20:07:52 UTC (+ 20m 28s)
- How bad is it?: Really bad

Team

- Incident Lead: Chris Evans
- Reporter: Chris Evans

Summary

This should explain what happened and the impact at a high level. We've pre-populated it for you, but you may wish to change it.

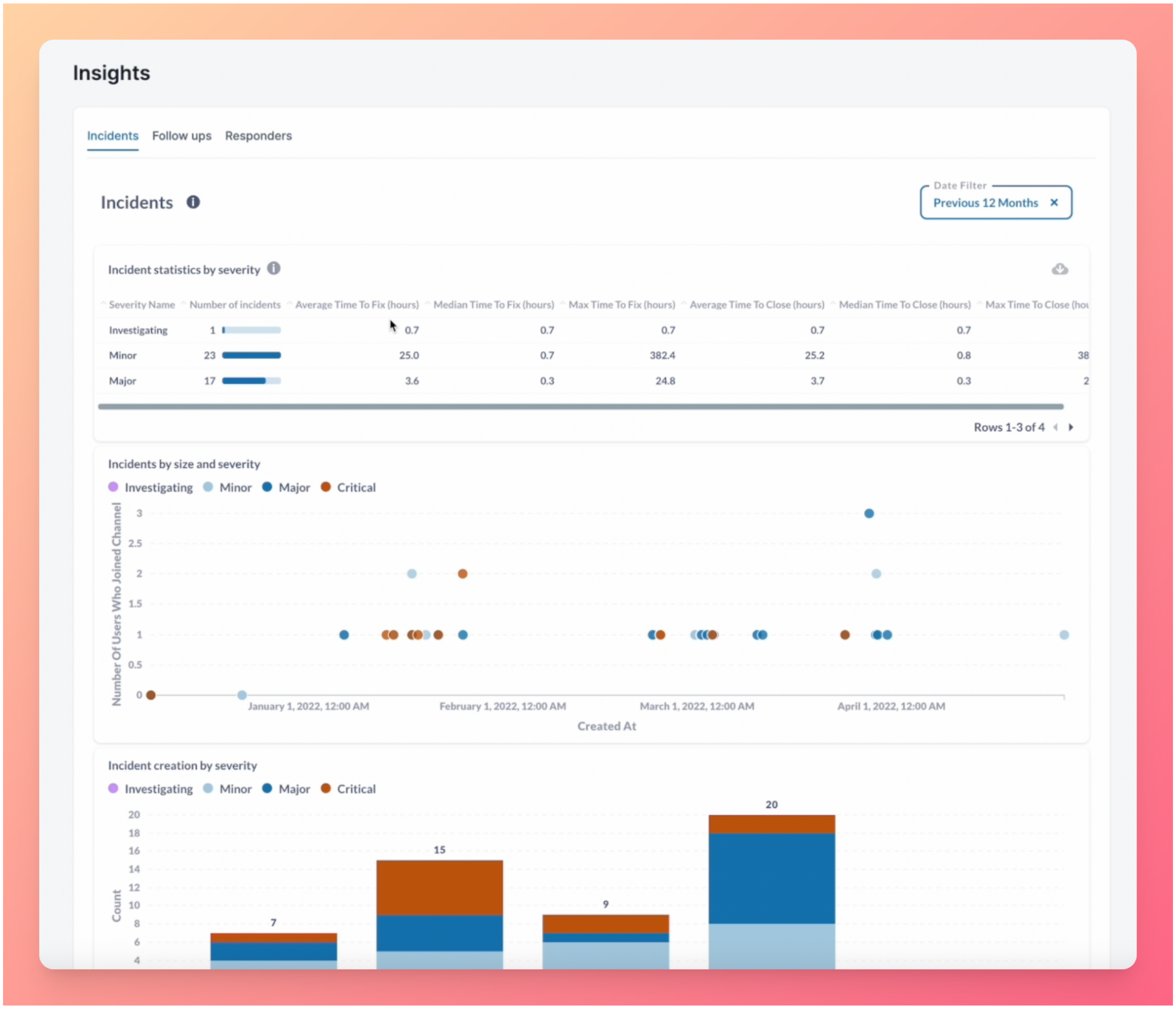
Customers are reporting errors whilst logging in on the website

Timeline

Time	Details
Tue, 03 May 2022 19:47:24 UTC	Chris Evans reported the incident
Tue, 03 May 2022 19:47:25 UTC	Chris Evans updated the "How bad is it?" field Empty → Really bad
Tue, 03 May 2022 19:48:16 UTC	Chris Evans became the Incident Lead
Tue, 03 May 2022 19:49:20 UTC	Chris Evans updated the summary: Customers are reporting errors whilst logging in on the website

incident.io insights dashboard

The incident.io insights dashboard allows you to get more value out of and learn from incidents in order to make improvements and data-based decisions. Keep an eye on trends (MTTX, affected services etc), spot anomalies and common contributing factors to downtime, and understand how incidents are affecting your team and how much time is your team spending on being reactive vs proactive.



Insights

Incidents Follow ups Responders

Incidents

Date Filter: Previous 12 Months

Incident statistics by severity

Severity Name	Number of incidents	Average Time To Fix (hours)	Median Time To Fix (hours)	Max Time To Fix (hours)	Average Time To Close (hours)	Median Time To Close (hours)	Max Time To Close (hou
Investigating	1	0.7	0.7	0.7	0.7	0.7	
Minor	23	25.0	0.7	382.4	25.2	0.8	38
Major	17	3.6	0.3	24.8	3.7	0.3	2

Rows 1-3 of 4

Incidents by size and severity

● Investigating ● Minor ● Major ● Critical
Number Of Users Who Joined Channel
3
2.5
2
1.5
1
0.5
0
January 1, 2022, 12:00 AM
February 1, 2022, 12:00 AM
March 1, 2022, 12:00 AM
April 1, 2022, 12:00 AM
Created At

Incident creation by severity