



User Guide

IT Operations Management Quick Start Guide



Congratulations! By downloading this guide, you've taken the first step towards unifying IT operations in your organization. With your IT Service Desk as well as IT Ops using Freshservice, you can look forward to:

1	Maximizing service availability: Define and monitor business & technical services. Prioritize degradations and outages with the biggest impact on end-user experience.
2	Minimizing IT complexity: Provide all IT Teams with complete and updated context and in-built collaboration channels to sort less, solve more.
3	Eliminating agent burnout: Respond, not react, to issues with a carefully crafted incident management process. Share ownership and accountability.

Ditch the sea of expensive and bloated software. Derive greater value from your Freshservice account with **IT Operations Management** features native to your IT service management platform.

Get started in 8 simple steps

1 Step 1

Connect your monitoring tools with Freshservice

To observe and manage the health of your digital infrastructure from within Freshservice, you need to integrate it with your monitoring tool/s.

WHERE: Admin → IT Operations Management → **Monitoring Tools.**

You can integrate monitoring tool/s in just a few clicks using the out-of-the-box integrations. If the tool of your choice isn't listed, use [email as a channel for alerts](#), or even custom integration using webhooks. Remember to complete the integration process by configuring the monitoring tool/s.

Once the integration is complete, you should start receiving alerts in the Alerts pane accessible from the left nav. Goodbye, multiple screens! Hello, single pane of glass with all alerts standardized, grouped, and ready to be analyzed! [Learn more.](#)

Select a monitoring tool to integrate with

Search monitoring tools

Select from a list of preconfigured monitoring tools

- Amazon CloudWatch (EC2, RDS, ALB)
- AppDynamics
- Applications Manager
- Azvik
- CrowdStrike
- Datadog APM
- Datadog Synthetic Monitoring
- Dynatrace
- Freshping
- Google Cloud Monitoring
- LogicMonitor
- Logz.io
- Microsoft Azure - Metric Alerts
- Microsoft SCOM
- NagiosXI
- New Relic APM
- New Relic Synthetics
- OpManager
- Pingdom
- Prometheus
- PRTG Network Monitor
- Site24x7
- SolarWinds Loggly
- SolarWinds NPM
- Splunk
- Sumo logic
- Zabbix

View Less

Integrate any tool of your choice via

- Webhook
- Email

Alerts - All alerts

Select all	Subject	Severity	State	Integration Name	Impacted Services	Acknowledged by	Associated...	Tags
<input type="checkbox"/>	Platform #Alert-1717	Critical	Resolved	SQLServer#12	-	Mark doe (Me)	#INC-1142	WCUS-R...
<input type="checkbox"/>	Platform #Alert-1716	Critical	Resolved	SQLServer#12	-	-	#INC-1141	WCUS-R...
<input type="checkbox"/>	Streaming Service Error #Alert-1712	Critical	Resolved	FRSH	-	Mark doe (Me)	AMI-1137	us-east1
<input type="checkbox"/>	AuthIDServ : us-east-1 : CPU Utilization crossed threshold #Alert-1751	Critical	Resolved	FRSH	Acme Web... +4 more	-	#INC-1356	us-east1
<input type="checkbox"/>	...ization crossed	Critical	Resolved	FRSH	Acme Web... +4 more	-	AMI-1355	us-east1
<input type="checkbox"/>	...e error limit of 10 % in	Critical	Resolved	PRTG Network Monitor 3	Novatrafic- Service	-	-	-
<input type="checkbox"/>	...ert-1390	Critical	Resolved	Auvik	Sonic	-	-	MTQMag...
<input type="checkbox"/>	...lization crossed	Critical	Resolved	FRSH	Acme Web... +4 more	-	-	us-east1
<input type="checkbox"/>	...301	Warning	Resolved	us-east-DC	-	Nathan Scott	-	-
<input type="checkbox"/>	...lization crossed	Critical	Resolved	FRSH	Acme Web... +4 more	-	-	us-east1
<input type="checkbox"/>	...e error limit of 10 % in	Critical	Resolved	PRTG Network Monitor 3	AD Service - On Prem	-	-	-
<input type="checkbox"/>	...lization crossed	OK	Resolved	FRSH	Acme Web... +4 more	Mark doe (Me)	-	us-east1
<input type="checkbox"/>	...okin... #Alert-1426	Critical	Resolved	N_Test	Bookings-UAE-service	-	AMI-835	us-east1

Alerts > #Alert-74

Alert RDS is Down

Updated 2 months ago (Tue, 12 Mar 9:36 PM)

MEM utilization on Alerting service threshold value. Current value is 99.99%

Alert logs 4 Associations 1 Notes Activities

Severity	Occurrence time	Message	Metric value	Additional info
Critical	Tue, 12 Mar 12:17:35 PM	Alert RDS is Down	99.20%	tags[1]: core services layer
Critical	Tue, 12 Mar 12:17:35 PM	Alert RDS is Down	99.20%	tags[1]: core services layer
Critical	Tue, 12 Mar 12:17:35 PM	Alert RDS is Down	99.20%	tags[1]: core services layer
Critical	Tue, 12 Mar 12:17:35 PM	Alert RDS is Down	99.20%	tags[1]: core services layer

Alert properties

- Severity: Critical
- Status: Open
- Integration name: Acme Serv
- Impacted service: Acme Payroll... +1 more
- Acknowledged by: -
- Source: Custom Integration
- Node: RDS_euc-shard2_{(node)}
- Resource: AP RDS 635
- Metric name: Mem Utilization Pct

FACT:

Freshservice improves the quality of alerts you receive by reducing alert noise by up to 88% through algorithmic grouping and further up to 50%-60% through Automated Grouping powered by the Freddy AI. In fact, you can explore your unique noise reduction metrics in the Insights Pane!

2 Step 2

Set up workflows to automate incident creation and routing

Not all alerts need to be investigated. Reduce noise, enhance clarity, and resolve fast using workflows with nested if-then-else rules in a single automator.

WHERE: Admin → Automation & Productivity → Workflow Automator → Alerts.

Create a new Event based workflow. In addition to the regular nodes such as Event, Condition, and Action, you can also use:

1	JSON Parser to parse the 'Additional Info' section in alerts or a JSON response from the web request node
2	Timer Node to add a time delay between workflow nodes
3	Web Request Node to fire off a custom API request and interact with external tools to take action.

Here are some examples:

1	Escalating critical severity alerts to incidents while delaying the escalation of error and warning severity alerts to mitigate potential flapping alerts using the Timer node.
2	Getting additional alert logs based on alert integration field name using the Web Request node. And then using the JSON parser node to parse any JSON Object in the additional logs and add the relevant data to the workflow context.

With workflows for alerts, you can create workflows to gain granular control over your alerts and improve your uptime.

[Learn more.](#)

My Team > Workflow Automator

Workflow Automator

Alerts - Event Based Workflows

- Webrequest and timer
 - Activated on May 02, 2024 by: Mark doe
 - Webrequest and timer Draft
 - Updated on Apr 16, 2024 by: Mark doe
- Alert Blocked by Firewall to Incident Sev0
 - This is a sample Alert rules for alert WFA migration
 - Activated on May 02, 2024 by: Mark doe
- Create high priority incident
 - Activated on May 02, 2024 by: Mark doe
 - Create high priority incident Draft
 - Updated on Apr 01, 2024 by: Mark doe

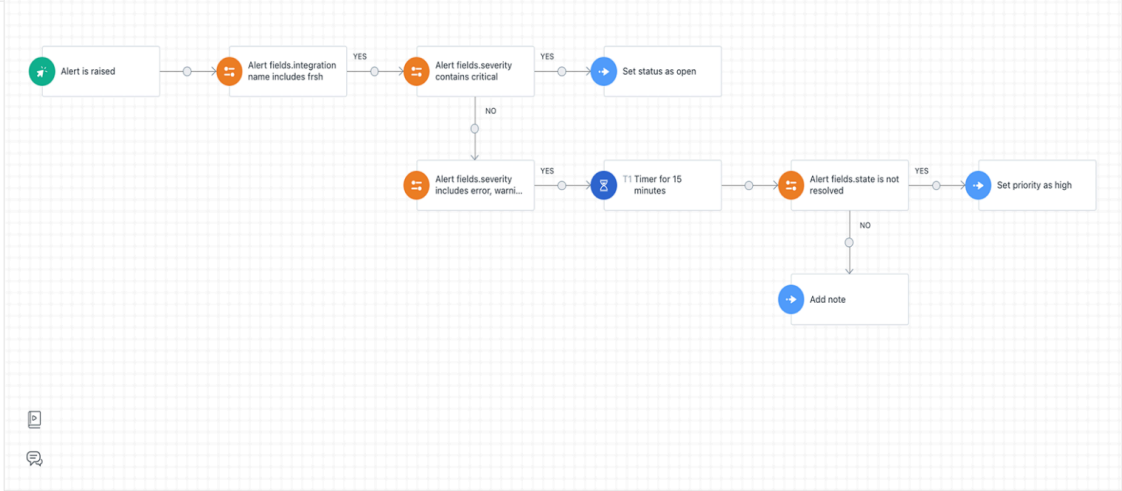
Get Adk My Team > Alert Automator > Create high priority incident

Activate: Create high priority incident Active Deactivate

Get Adk: + Add Description

Updated: + Add Description

Test:



FACT

You can use the Web Request Node for actions such as notifying agents using other channels, running preliminary remediation steps, adding SOP for a certain kind of alert as a note.

3 Step 3

Set up Cloud Management to discover, automate, and streamline cloud operations

If you use cloud resources, setup integrations to [discover, manage and automate](#) the cloud assets from within Freshservice.

WHERE: Admin → Asset Management → **Cloud Management.**

Integrate with multiple leading cloud providers such as [AWS](#), [Azure](#), and [VMware VCenter](#) to discover your cloud resources. Next, use the [visibility](#) to auto-discover orphaned resources, capture cloud infra dependencies, and ensure high-precision service management.

With Orchestrations apps like AWS EC2 - Orch and Azure Cloud- Orch [automate actions](#) such as powering on/off, resizing, & requesting new VM instances. Save time & effort with agentless cloud workload operations!


Inventory - All Assets* Search

Delete Bulk Update Print labels Showing 1 to 31 of 31

Name	Asset Type	Location	Used By	Department
<input type="checkbox"/> fwadmin	Azure VM	US	David Benjamin	IT
<input type="checkbox"/> Freshservice-Support-SSO	Azure VM	US	David Benjamin	IT
<input type="checkbox"/> FS-Agent	Azure VM	US	David Benjamin	IT
<input type="checkbox"/> FWFS-AD	Azure VM	US	David Benjamin	IT
<input type="checkbox"/> FWFS-AD	Azure VM	US	Nick Edison	IT
<input type="checkbox"/> APAC-DEDVM-FSES1	Azure VM	US	Robert Tyler	IT
<input type="checkbox"/> fwstaging-DHCP	Azure VM	US	Nick Edison	IT
<input type="checkbox"/> fwstaging-ADC	Azure VM	US		
<input type="checkbox"/> fwstaging-AD-01	Azure VM	US		
<input type="checkbox"/> FWS-HRMS-Public02	Azure VM	US		
<input type="checkbox"/> FWS-HRMS-Public01	Azure VM	US		
<input type="checkbox"/> FWS-HRMS-Public-3	Azure VM	US		
<input type="checkbox"/> FWS-HRMS-Public-2	Azure VM	US		

Discover your cloud resources

Integrate with leading cloud providers like AWS, Azure and VMware cloud to build a single system of record for your cloud resources in the Freshservice inventory.

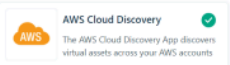


Setup integrations to discover and manage the cloud assets

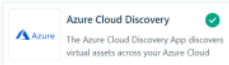
Get started with cloud management integrations

Cloud discovery

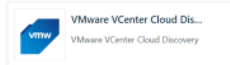
Discover a broad range of cloud resources with its dependencies.



AWS Cloud Discovery
The AWS Cloud Discovery App discovers virtual assets across your AWS accounts



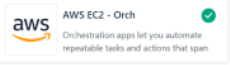
Azure Cloud Discovery
The Azure Cloud Discovery App discovers virtual assets across your Azure Cloud



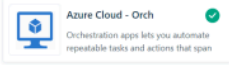
VMware VCenter Cloud Discovery
VMware VCenter Cloud Discovery

Cloud orchestration

Streamline operations on the discovered cloud resources with end-to-end automation



AWS EC2 - Orch
Orchestration apps let you automate repeatable tasks and actions that span



Azure Cloud - Orch
Orchestration apps let you automate repeatable tasks and actions that span

FACT:

Cloud management offers an inbuilt cloud catalog and workflows to help you quickly get started and optimize cloud operations and cost.



4 Step 4

Define services and associate them with monitoring tools

Now that you've integrated your monitoring tools and cloud resources, prioritize which incidents to focus on using [Service Health Monitoring](#).

That's right! The status of your business is defined by the health of the services that your end users care about. Define and monitor business and technical services by associating monitoring tools that track the condition of assets powering that service. When there's a degradation or an outage, immediately start working on associated alerts and incidents to get the service back up.

Where: Choose an Option

Left nav → Alerts icon → **Services**.

Admin → IT Operations Management → **Monitoring Tools**

Either use the Services pane to define a service and then associate one or more monitoring tools to it. Or head to the Monitoring Tools list page and associate one or more services with each monitoring tool.

Services - All Services

Service Name	Status	Type	Impact	Managed By Group	Managed By
TuCCI API	Operational	Services	High	Payments Infra	Michael Lewis
Platform	Operational	Services	Low	DevOps	Robert Smith
Mobile Infra	Operational	Services	Low	DevOps	Michael Lewis
Load Balancer Service	Operational	IT Service	High	DevOps	Robert Smith
Shopping Cart	Needs Attention	Business Service	High	Payments Infra	Michael Lewis
Kubernetes Services - AWS	Operational	IT Service	Low	DevOps	Michael Lewis
Kafka - MQ	Operational	IT Service	Low	DevOps	Michael Lewis
k8	Operational	IT Service	Low	DevOps	Michael Lewis
ITSM Service	Operational	IT Service	Low	DevOps	Michael Lewis
InstaCheckin	Operational	Services	Low	DevOps	Michael Lewis
Email Service	Operational	Services	Low	DevOps	Michael Lewis

Service > ShoppingCart

ShoppingCart
Type: Business Service | Status: Needs Attention

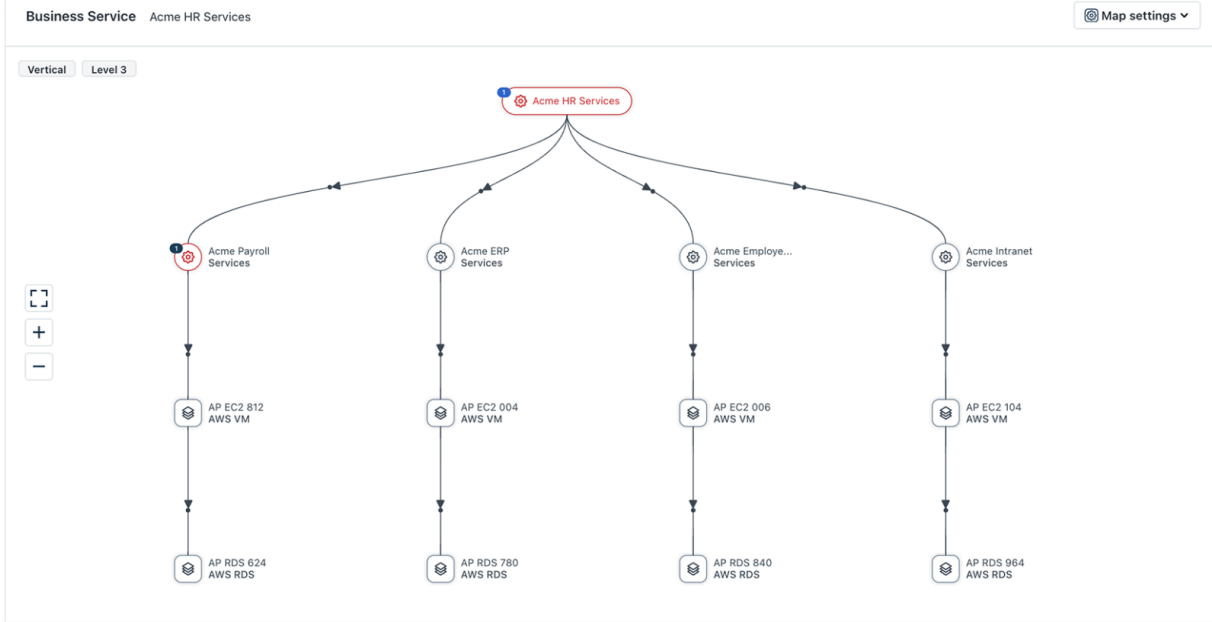
Overview Relationships Associations Alert Configurations Activities

Description
ShoppingCart is a platform that allows our shoppers to check out items via our website and mobile app. Service Infra includes US, EU and ANZ DC. ShoppingCart service infra, including US, EU, and ANZ DC

Top 5 unresolved alerts by severity

- #Alert-1201 Alert - Memory utilization high on Azure VM_SC325Prod
Created on Mon, 28, Oct 05:00 AM
Severity: Critical
Status: Open
- #Alert-1198 Alert - Memory util near 80% on Azure VM_SC325Prod
Created on Mon, 28, Oct 03:30 AM
Severity: High
Status: Open

Properties
Business Impact: High
Managed by Group: TuCCI Monitoring Group
Managed by: Oliver Philip (oliver.philip@tucci.com)



FACT:

Quickly grasp the health of a service by finding top related alerts, incidents, assets, associated monitoring tools, and a service map – all in one place.

5 Step 5

Set up your Status Page

Now that you have defined your services and set them up to track their health, it is important to communicate their status to your end users. After all, you'd want to nurture trust by proactively updating them about service disruptions – whether planned or unplanned. Freshservice enables you to do so easily via a branded [Status Page](#).

WHERE: Admin → Channels → **Status Page**.

Create your Status Page by choosing a name and creating its URL. Next, configure the services whose health status you want to post about. Then customize the Status Page with your company logo and favicon. You can also track the page performance by entering your Google Analytics Tracking ID. Last, but not the least, set the privacy as 'Public' or 'Private' as per your requirements. A private Status Page will need subscribers to login via SSO.

Now that your page is ready, you can update your end users about a [maintenance window](#) or an outage through a Status Page Incident. [Learn more](#).

Configure services
Fine-tune service visibility and status by selecting from your tracked services list

Services	Status page display name
Bookings-UAE-service	Bookings-UAE-service
Acme Website	
AuthenticationService	AuthenticationService
UserCart	UserCart
EmailService	EmailService
Reporting	Reporting
Search	Search1111

Acme Digital-IT [Subscribe](#) [Login](#)
[Subscriber Login](#)

All Services are operational

Operational Degraded Performance Partial Outage Major Outage Maintenance

- Acme ERP: 100% on the last 90 days
- Acme Intranet: 100% on the last 90 days
- Acme HR: 100% on the last 90 days
- Acme Business services: 100% on the last 90 days
- Acme Payment: 100% on the last 90 days

Operational Degraded Performance Partial Outage Major Outage Maintenance

Incident History **Upcoming Maintenance** [Next 30 days](#)

No Upcoming Maintenance to list here

FACT:

While setting up the Status Page, use the preview pane on the right to see what the page will look like to your subscribers.

6 Step 6

Set up on-call schedules to automate and finetune incident escalation

Now that you have a clear view into service outage or degradation, set up the [On-Call Management](#) module to get the right agent to acknowledge the incident fast.

You see, the longer it takes for an incident to be acknowledged by the right agent, the longer the wait for resolution, and higher the cost. On-Call Management eliminates chaos and confusion by automating escalation through predetermined rules and over modern communication channels.

WHERE: Admin → IT Operations Management → **On-Call Schedules.**

Create one or more shifts within a schedule to address different on-call requirements. Notify agents over phone, SMS, email, the Freshservice mobile app, Slack, WhatsApp, and MS Teams. Finetune the scale and intensity of escalation to suit incident severity.

The image displays a user interface for managing on-call schedules and escalation policies. The top section shows a calendar for 'Santa's first schedule' (GMT+05:30 Kolkata) from May 5 to May 11, 2024. Agents are assigned to shifts: Shiny Upatree (Primary), Sugarplum Mary (Secondary), and Wunorse Openstae (Tertiary) on Monday, Wednesday, and Friday. The bottom section shows the configuration for an 'Urgent-High Priority Escalation Policy'. The policy name is 'Urgent-High Priority Escalation Policy' and it applies to 'All shifts'. The conditions are set to 'Match any of the conditions below' with a priority of 'Urgent' or 'High'. The escalation path consists of two levels:

- Level 1:** Notify Primary on-call via Call, SMS, Email, or WhatsApp after 0 minutes. If unacknowledged or unresolved, notify Primary on-call via Call, SMS, or Push notification after 5 minutes.
- Level 2:** Notify Secondary on-call via Call, WhatsApp, or Push notification after 2 minutes. If unacknowledged or unresolved, notify Secondary on-call via Call, Stack, or WhatsApp after 2 minutes.

FACT:

Agents not only receive notifications but can also acknowledge, escalate, or resolve incidents on popular communication channels. Check out [this demo video](#) to learn more.

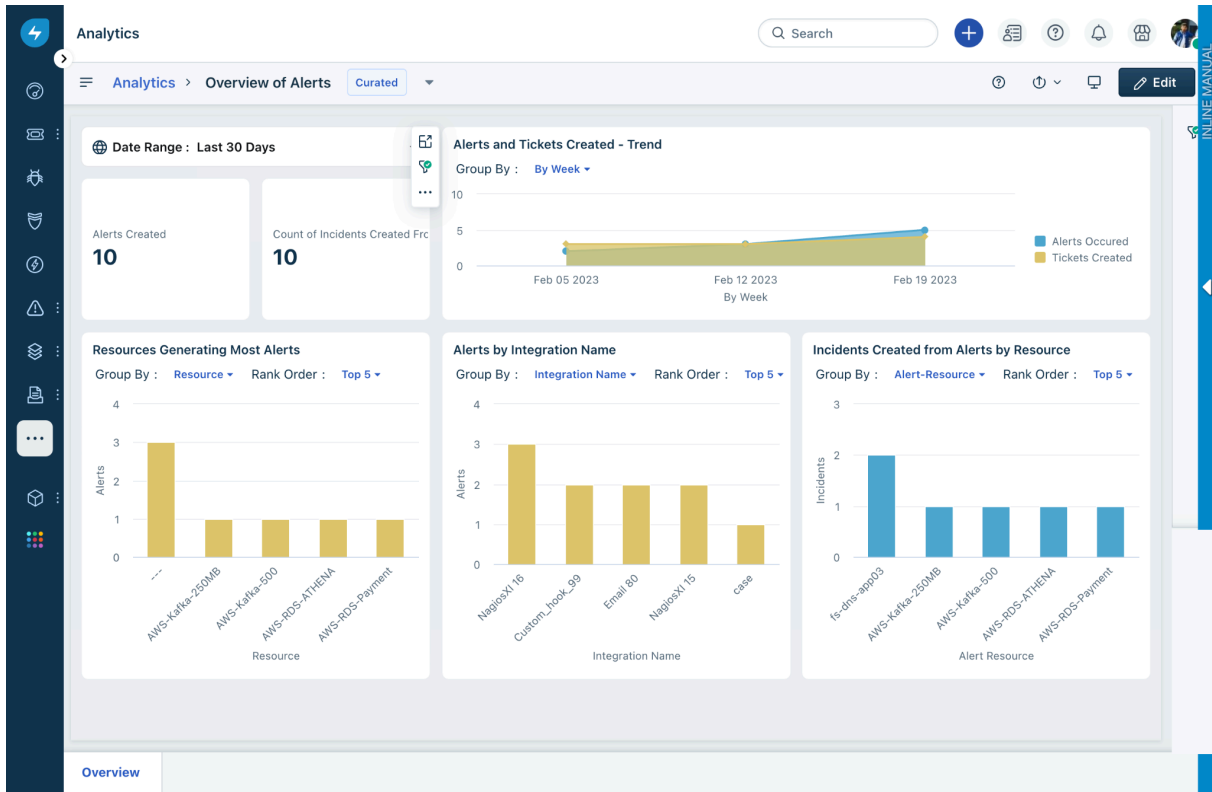
7 Step 7

Set up analytics to observe and analyze infrastructure health

Now that you're receiving alerts and resolving them in Freshservice, head to the Analytics section to get a granular view of your digital infrastructure. Explore the system-curated Alerts report. Get a visual snapshot of alerts and incidents created over the past 30 days, the resources generating the most alerts, and more. Eager to dig deeper? Create your own custom report!

WHERE: Left Nav → Reporting → **Analytics**.

Explore curated reports for Alert Management, On-Call management, and more to study trends and foresee changes.



FACT:

Gain insight into areas of success and opportunities for improvement by tracking KPIs related to alerts and incidents.

Understand your team's performance in acknowledging and resolving, and how workloads are distributed to ensure that teams are balanced and working at peak efficiency.

8 Step 8

Explore Major Incident Management

Don't let major incidents derail your business. Familiarize yourself with the Major Incident Management capabilities which enable you to strategically plan and accelerate incident resolution at every step to minimize the impact of service disruption.

WHERE: Left Nav → **Tickets.**

Open any ticket and select 'Promote as Major Incident' on the top right. Your screen would transform into a war room, loaded with all kinds of features and functionalities to enable quick collaboration, information gathering, incident resolution, and post-incident reporting. Here's how Freshservice minimizes friction to help you resolve incidents fast:

1	Initiate discussions on Slack and MS teams from the incident detail page
2	Create and share Zoom Meeting invites to get the right people on board

3

Send periodic emails to inform IT teams, business stakeholders and customers about the impact and progress of the incident

4

Update end users about the progress of the incident by posting to a public status page

The screenshot shows a Jira ticket interface for a Major Incident. The ticket title is "Agents logged in via SSO are getting logged out" and it was reported by the System a day ago. The ticket is currently "Open" with a priority of "High" and a status of "Open". The description states: "We have noticed that agents logged in via SSO are being logged out immediately after landing on the product dashboard page. Our developers have identified the issue and are working towards mitigating the same. More updates to follow." The ticket is associated with several alerts, including CPU usage, disk usage, and wireless intrusion. The interface also shows a "Communicate" section with options for Email, Freshstatus, MS Teams, Zoom, and Slack. The "Properties" section shows the ticket is a "Major Incident" with a "High" urgency and "High" impact. A notification at the top indicates the ticket was "Promoted as Major incident successfully".

FACT:

Create a post-incident report to understand what went wrong to avoid similar incidents in future. Capture the timeline of the incident, document information, and share the report with stakeholders.

You're done setting up ITOM in Freshservice!

Bravo! Now that you've toured the ITOM features in Freshservice, you can customize the setup as per your specific requirements. Need assistance? Write to support@freshservice.com and we'll be happy to help.

Want to dig deeper?

1	<u>Learn all about Alert Management in Freshservice</u>
2	<u>Learn all about On-Call Management</u>
3	<u>Learn all about Cloud Management</u>
4	<u>Learn all about Service Health Monitoring</u>
5	<u>Learn all about Status Page</u>
6	<u>Learn all about Major Incident Management</u>