

By now, you should've met with a Blameless expert to help you with initial modifications. This document walks you through the typical workflow of key Blameless features including incident management, retrospectives, and reliability insights.

To start off, let's get you set up.

# Settings & Integrations

Note: This requires administrator privileges.

## SETTINGS

### Organization Setup

**General**

ORGANIZATION NAME \*

Blameless Sales DEMO Environments

The name of your organization

TIMEZONE \*

America/Los\_Angeles

INCIDENT ROLES

Commander x
Communication lead x
CRE x
Postmortem Owner x
Engineering Lead x
Customer Support x
Eng Incident Lead x
  
Product/Comms Incident Lead x
Tech Support x
Captain x
Project Manager x
Incident Commander x
Enter your incident roles

### Incident Types

Blameless Onboarding	MANAGE
Cloud Operations	MANAGE
Cloud Unplanned	MANAGE
Compliance	MANAGE
Create SLO	MANAGE
Customer Incident	MANAGE

### Bot Setup

[See our docs for more details.](#)

## INTEGRATIONS

### Messaging

-  Microsoft Teams
-  Slack

### Alerting

-  OpsGenie
-  PagerDuty
-  StatusPage

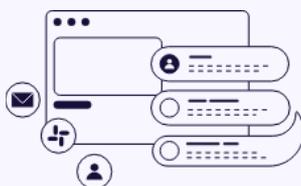
### Video Conferencing

-  Google Meet
-  GoToMeeting
-  Microsoft Teams
-  Zoom

### Ticketing

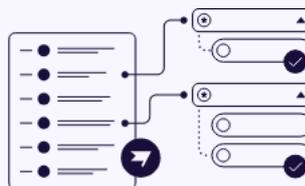
-  Jira
-  Service Now

## Key Features



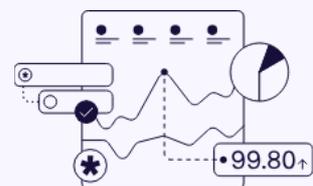
### Incident Management

Roles | Automated Workflows  
Communications | Event Timeline



### Retrospective

Templates | Editor  
Reports



### Insights

Team & Org | Dashboards  
Reports

# Incident Resolution

Note: Throughout incident resolution, most steps can be completed either through your chat integration or directly in the Blameless product.

## INCIDENT DETECTION

- Decide whether to create an incident automatically or manually for every incident detected.
- In the [PagerDuty setup](#), decide if you want to automatically trigger an incident, what is the threshold, what are the triggers, etc.

## STARTING AN INCIDENT

Once an incident is detected and you start investigating, you can do so in three ways:

1 Slack

`/blameless command`

2 Microsoft Teams

`@blameless command`

3 Blameless Incident Page

+ New Incident

### Popular Slackbot Commands for Blameless

`/blameless severity`  
`/blameless status`  
`/blameless resolve`  
`/blameless assign`  
`/blameless add tag`

### Popular Microsoft Commands

`@blameless`  
`@blameless start incident`  
`@blameless show incidents`

Upon creating an incident, you'll be asked to answer three questions, two of which are required.

1

### Incident Type

Default  
Support  
Security  
Other

2

### Severity

Required for SEV 0-3  
  
Determines how your  
incident escalates

3

### Title & Description

Gives context to the  
incident for all relevant  
parties during incident  
response and  
retrospective.

## Upon selection, a few actions will happen automatically:

- Blameless creates a dedicated incident channel in your chat tool
- We also trigger any pre-built [CommsFlow announcements](#)
- Your incident gets a dedicated virtual conference room
- We open a parent ticket in Jira for the incident

## Next it's time to assign roles, starting with the Commander

The Commander role is assigned automatically to whoever creates the incident in Blameless. They can also assign it out to someone else. Assuming you already took care of [Incident Roles](#) during the initial setup, you'll have a dropdown list to choose from.

**Make up any kind of role you need!** Here are some common ones:

- Communications Lead
- Technical Lead
- On-Call Engineer

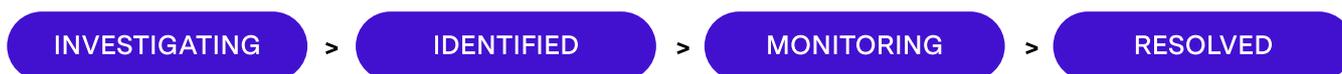
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## Aligning with on-call schedules

**Check to see who's on-call before assigning roles!** In your chat tool, type `/blameless oncall to:`

- Select a [SERVICE] from PagerDuty
- Invite the on-call engineer to the incident channel
- Trigger PagerDuty alerts right from your chat tool
- View the escalation policy

**Update the incident status** from either your chat tool or the Incidents page in Blameless.



**Remember, a status change will trigger:**

- New task assignments
- Pre-built CommsFlow communications
- An update to the incident timeline

# Resolving an incident

Once an incident is moved to the [RESOLVED] status, Blameless captures a timestamp for “End of Incident Impact”. The [RESOLVED] status also triggers a daily reminder to the Retrospective Owner to conduct a Retrospective meeting. The notification stops once the Retrospective is marked [PUBLISHED].

Reminder: Moving an incident to the [RESOLVED] status does not archive the incident page or the incident channel. You can revert the status back to another state at any time.

## Incident Resolution

Note: Throughout incident resolution, most steps can be completed either through your chat integration or directly in the Blameless product.

By default, a retrospective is required for every incident. You can always make them “Not Required” for specific incident types. Create a Retrospective by filling out two tabs: OVERVIEW and ANALYSIS. Overview asks you pre-set questions to collect a quick summary of the incident. Analysis is a collaborative text editor to say anything you want!

### Additional states are:

- Assigned/Unassigned
- Draft ready
- In review
- Approved
- Rejected
- Published

You can send out daily reminders to complete the Retrospective until it's [PUBLISHED].

### OVERVIEW

RETROSPECTIVE: RS-1538: Customers cant login...employer portal is down

RETROSPECTIVE STATE	CREATED	UPDATED
Unassigned	03/08/2022 9:39 AM	2 d, 1 hr, 30 min, 59 sec ago

OVERVIEW

SUMMARY

Customers cant login...employer portal is down

Custom Questions

What group(s) were impacted by this incident?

- External Customers
- Internal Staff
- Other - Please document

Other

What is the likelihood of a similar incident occurring again?

- Unlikely
- Somewhat likely

### ANALYSIS

RETROSPECTIVE: RS-1540: Customer's cant login..something is on fire

RETROSPECTIVE STATE	CREATED	UPDATED	RETROSPECTIVE OWNER
Assigned	03/08/2022 11:25 AM	5 d, 16 hr, 36 min, 55 sec ago	Doug

OVERVIEW

ANALYSIS

**Customer Incident Retrospective**

**What happened**

Larry V - At 12:24...I got an alarm text stating that the web site was not responding to pings from a running Pingdom job. Quickly assessed that this was in fact true. Opened Slack and immediately initiated an Incident Blameless (#\_incident-1010, Sev0, Incident Type - Infrastructure-Customer Related ). Checked Pagerduty. Lauren was on call. Notified her, she said that she would look into and changed status to Investigating. He was notified. She called me back at 1:17PM saying that the issue had been fixed, it was due to a bad patch.

**Environment of the Incident**

Lauren S - It was the load balancer for the web servers. A patch was installed last night around 11:30PM. Apparently, this patch was pulled back by the manufacturer this morning and the Infrastructure team was aware until investigation of the problem.

# Reliability Insights

Data, metrics, and tags are important for post-incident analysis. See what's reported automatically vs. what you need to configure manually in Blameless.

## AUTOMATICALLY COLLECTED

- Response Team
- Start of Incident Impact
- End of Incident Impact
- Severity
- Type
- Parent Ticket
- PagerDuty Trigger
- Screenshots Sent in the Chat

## MANUALLY ADDED

- Custom Tags
- JIRA Follow-Up Actions
- Swimlanes\*
- Assigned Retrospective Roles

\*Swimlanes are sub-channels for an incident created in your chat tool to focus on specific subtasks during incident response. [Learn more.](#)

