



# Improve incident management workflows with apps in Microsoft Teams

Tailored solutions built for energy, chemical, and utility industries



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# Bring experts together to solve issues faster in Teams

Speed issue resolution by connecting everyone in the flow of work with collaborative apps tailored for crisis management scenarios. Apps in Teams help everyone better triage issues with their hybrid team by connecting them to the information, expertise, and tools they need to collaborate and solve problems all in one place.

## User scenarios

- Raise an incident
  - During a routine safety walk, an engineer discovers a damaged pipe that needs immediate repair.
- Triage incidents as a team
  - In a Teams meeting, an incident response team collaborates in real time to solve the issue faster.

## For each scenario

- Scenario vision
- Primary persona
- Scenario storyboard
- Solution design best practices
- Solution architecture



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Raise an incident



# Scenario vision

## Context



**Plant Manager Daniela** manages the incident room at Contoso, a large integrated oil and gas company. During a safety walk, an engineer on her team just discovered the main feed in an oil distribution system is damaged and must be repaired before a cargo tanker arrives in three hours.

## Current state

With only a physical incident management room

- ⚠️ The engineer must find Daniela to tell her about the incident in person.
- ⚠️ Daniela wants particular specialists to help fix the distribution system but is limited by who is close by and available.
- ⚠️ A repair team is finally assembled via 1:1 conversations and emails. They stop other work to get started as there is no standard or secure way to manage multiple incident workstreams.
- ⚠️ Each person must search incident guides, inventory, and compliance information in a different system.
- ⚠️ If team members find what they were looking for, there is no way to share with others.
- ⚠️ With no way to share updates, work is duplicated, stalled, or potentially even executed incorrectly.

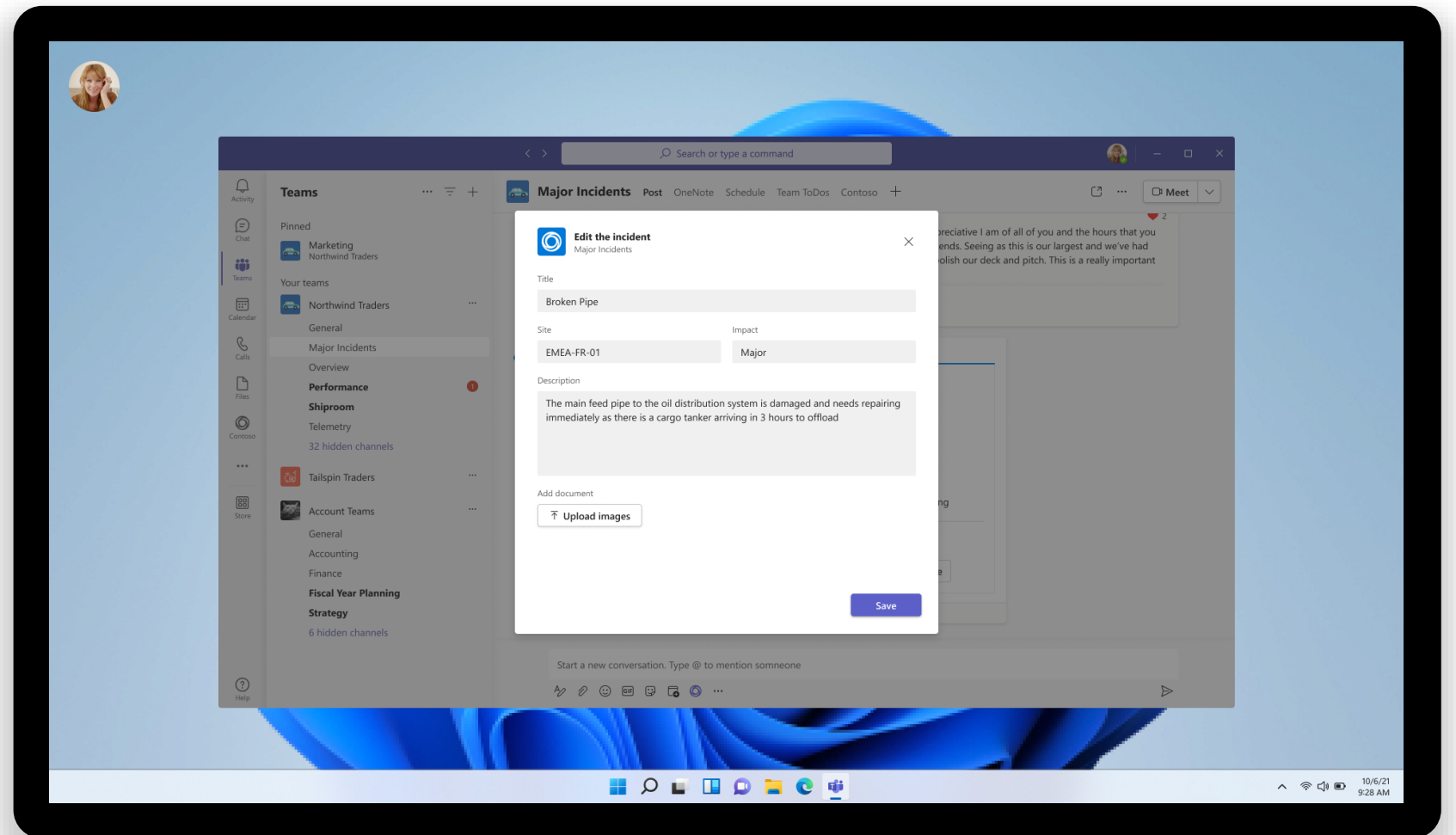
## Future state

With a virtual incident management room in Teams

- ✓ As soon as the engineer discovers the issue, they submit an incident via a site walk application in Teams. This kicks off a notification to Daniela who then photographs the damage on her mobile device and immediately submits the incident to Contoso's Major Incident channel in Teams.
- ✓ A subject matter expert (SME) team including maintenance team plant managers, the shipping controller, and others, are automatically alerted to the new incident.
- ✓ With everything pertaining to this incident organized in a Teams channel, they can streamline their issue resolution process and don't have to abandon their other priorities.
- ✓ The SME team comes together in a virtual Teams meeting to triage the issue live, using a pre-loaded task board to map the solution.
- ✓ In the meeting, the team securely searches for and shares key documents.
- ✓ As the pipe is being fixed, everyone uses Teams chat to share status updates in real time—pipe fixed with time to spare!

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Add incidents in real time  
on desktop, tablet, or  
mobile via the Teams app



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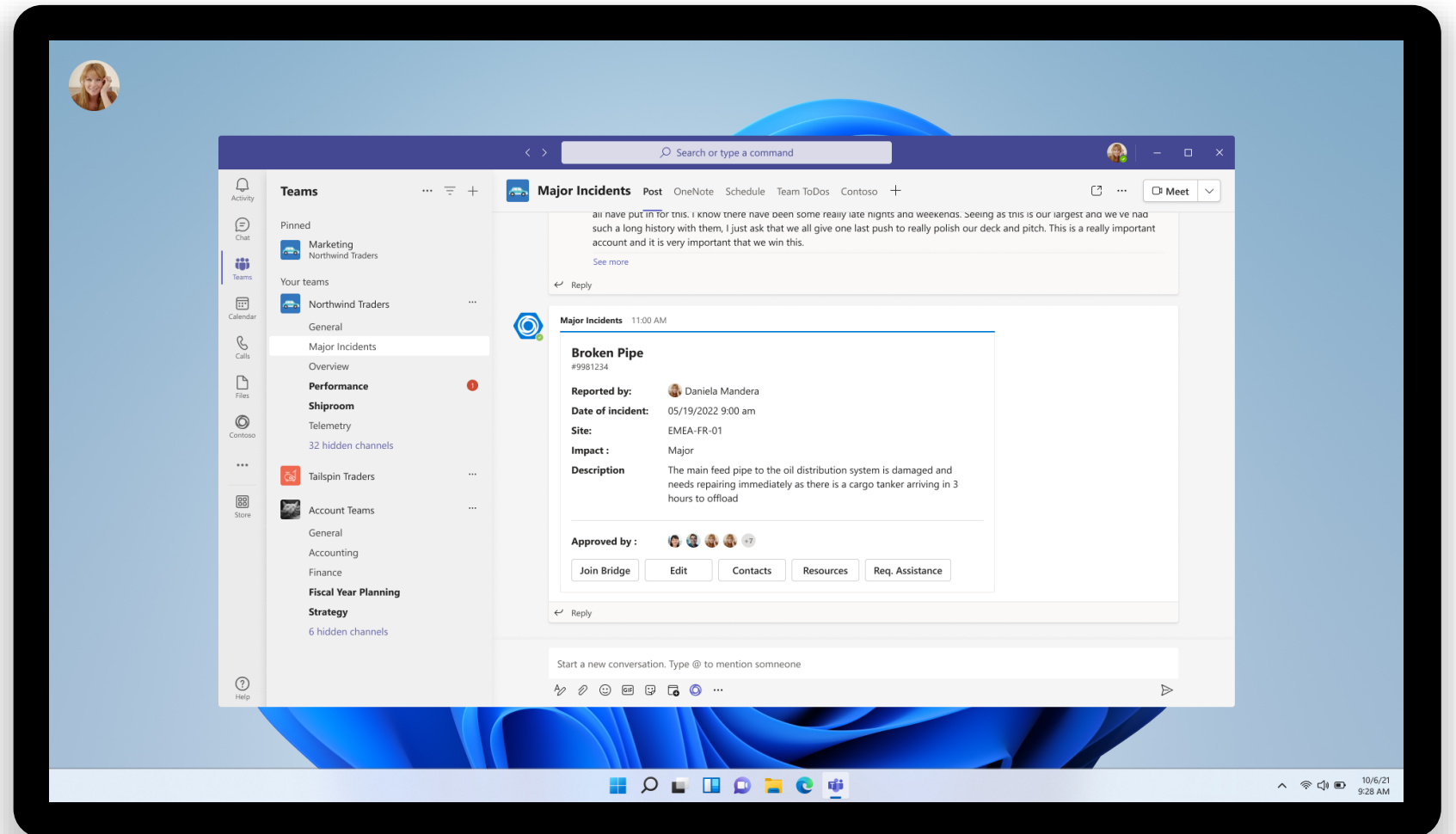
# Triage incidents as a team





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Notify experts the  
moment an incident is  
submitted via an  
automatic post

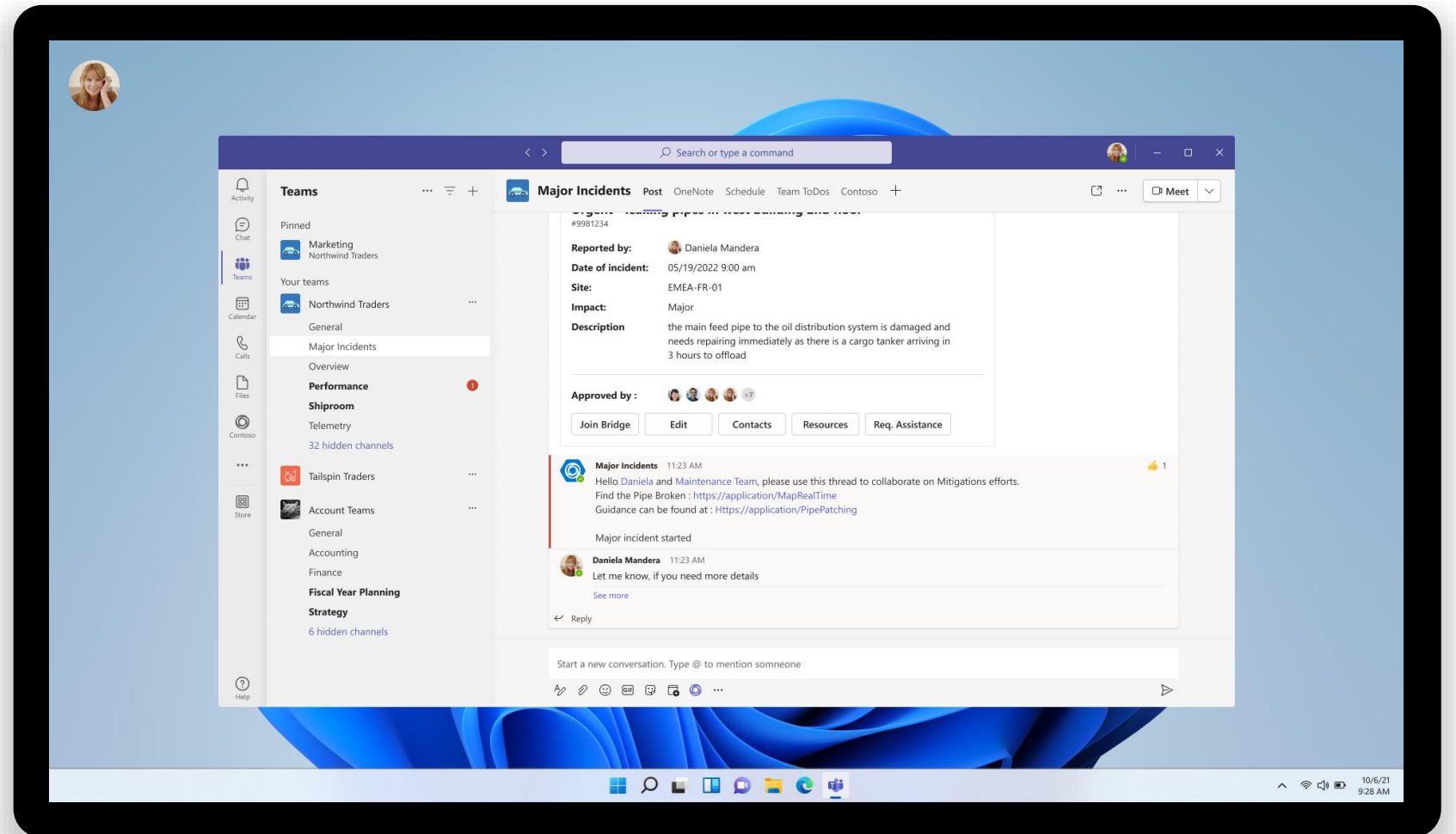


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## Bring your support team together, no matter where they are

Daniella requested assistance from  
the maintenance team.

Plant managers, maintenance, and  
the shipping controller use the Join  
Bridge button to join a meeting.



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## Leverage a pre-loaded task board to resolve incidents faster

Plant managers, maintenance, and  
the shipping controller plan the fix  
using the in-meeting task board and  
help ensure that the tanker can be  
unloaded on time.

The screenshot displays a Microsoft Teams meeting interface. At the top, the meeting title is "Weekly planning". The meeting controls bar includes icons for chat, call, and a red "Leave" button. The main area shows a grid of video thumbnails for participants: Serena Davis, Babak Shammis, Charlotte de Crum, Krystal McKinney, and a man in a headset. A central "Incident management" task board is open, showing details for an incident titled "Urgent - Broken Pipe". The task board includes fields for Owner (Mona Kane), Secondary responsible (Adi Kapoor), Dependencies (Task2, Task 3, Task 4), Progress in % (50%), and Priority (High). The description states: "The main feed pipe to the oil distribution system is damaged and needs repairing immediately as there is a cargo tanker arriving in 3 hours to offload". To the right, a "Contoso" Kanban board is visible, showing two incident cards: "Urgent - Broken pipe #9981234" and "Incident Oil on the floor #9981237". Each card displays a progress bar with 100% completion. A "Share to meeting" button is located below the Kanban board. The Windows taskbar at the bottom shows the system tray with the date and time: 10/6/21, 9:28 AM.

# Solution highlights – best practices

## Key solution design considerations



### Platform extension points

- [Apps in meetings](#) are used to surface information needed by the RM in converting a lead. Meetings / Calls are a core component of RM's day to day activities so meeting extensibility is a core component.
- [Task modules](#) are used to update an activity/ticket, send emails, perform calls, and add reminders.
- [Card refreshes](#) are used to update card status, helping to simplify readability and ensuring the app does not spam users with multiple cards for updates.
- [Notifications](#) are used to notify users automatically and users can escalate the ticket to a crisis.

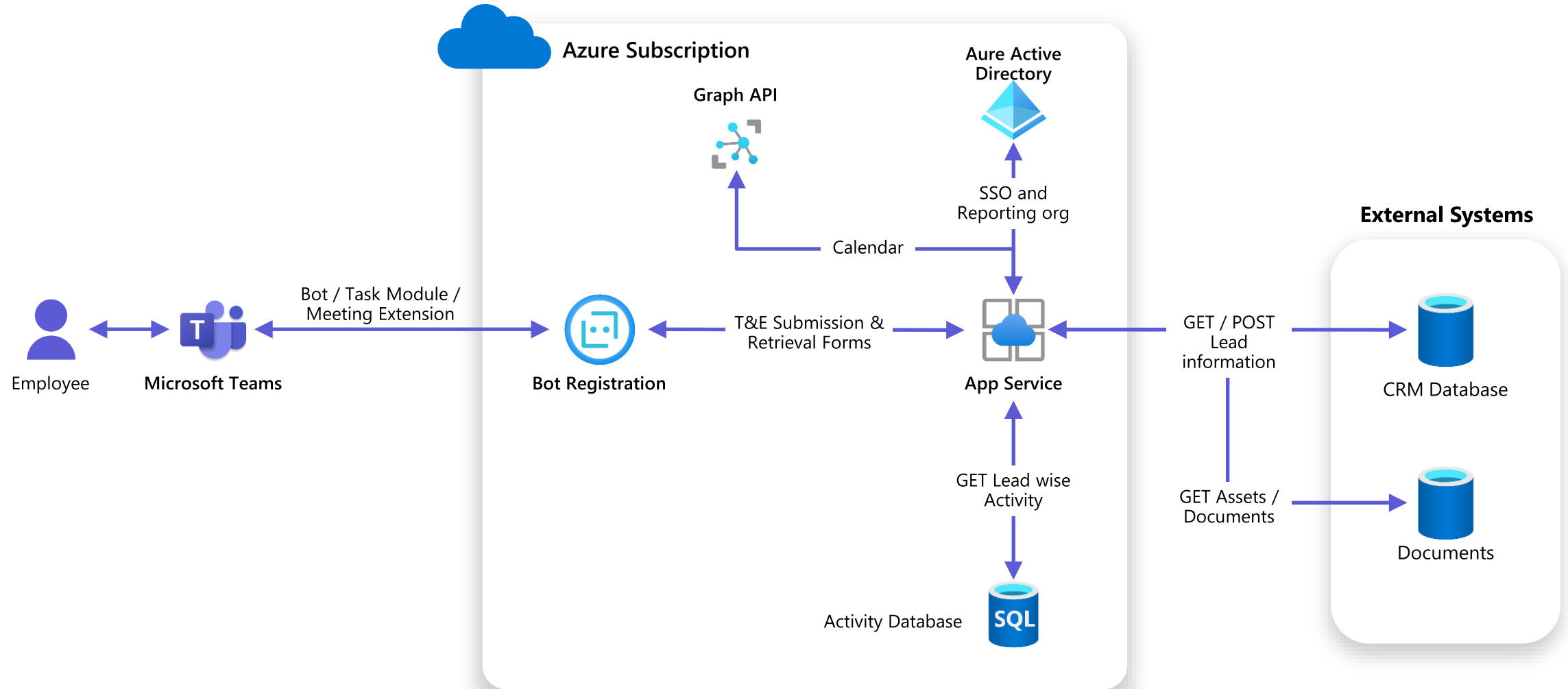
### User experience

- In a channel, the user will receive notification from a bot concerning a crisis ticket, they can collaborate with their colleagues and can check ticket status.
- In a meeting, the user can see a task list and start to address the crisis.
- With a chatbot the user can generate a ticket and post it automatically.

### Graph API

- The app also uses [Create Event](#) Graph API to create Teams calls between leads and RMs and [Calendar Graph APIs](#) to read and show calendar events

# Solution architecture



**Thank you**

