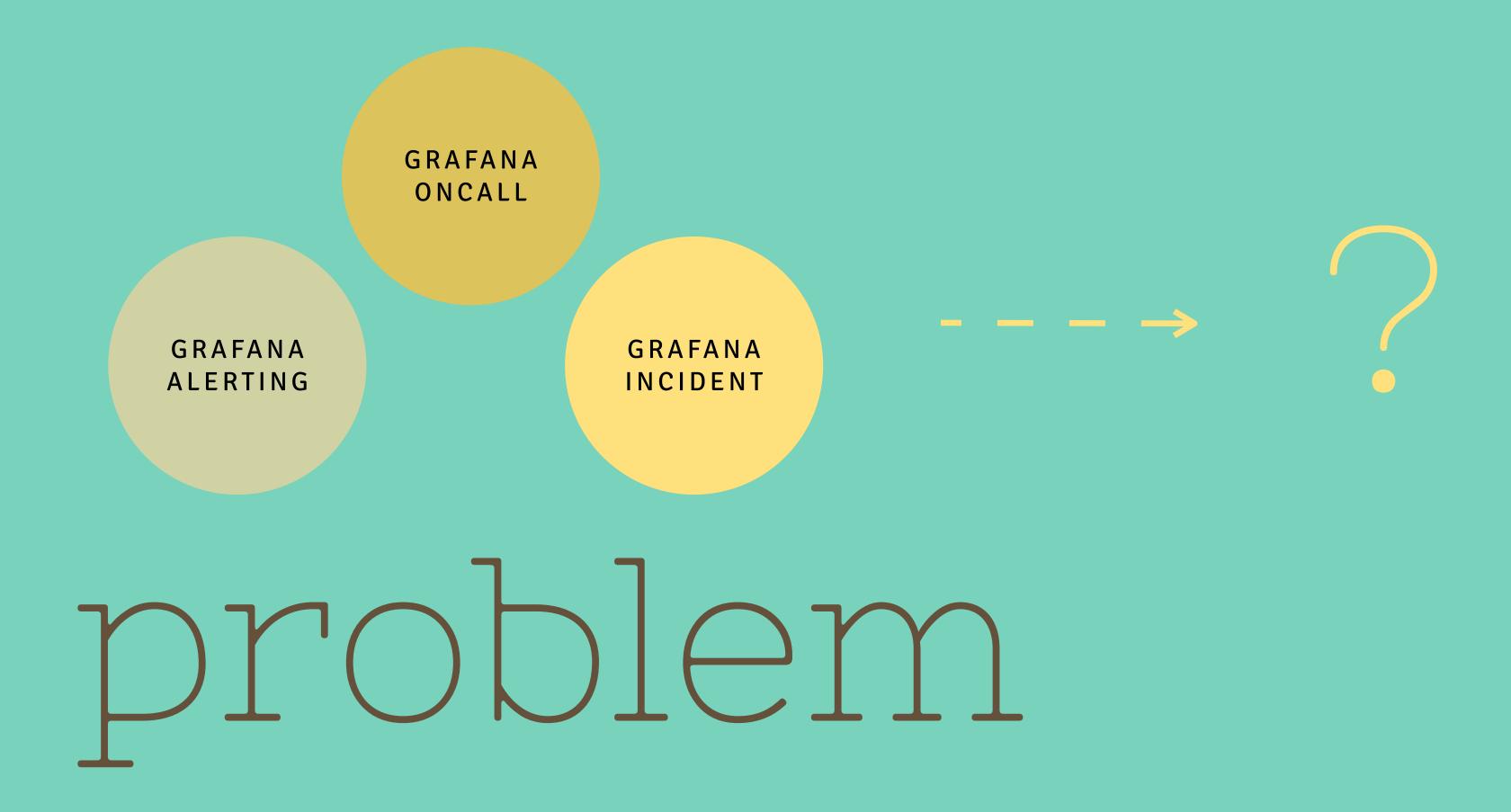


GRAFANA ALERTS AND INCIDENTS
(GRAFANA OPS)

# unification project

UNIFYING THE USER EXPERIENCE FOR THREE SEPARATELY BUILT PRODUCTS THAT ARE PART OF ONE WORKFLOW

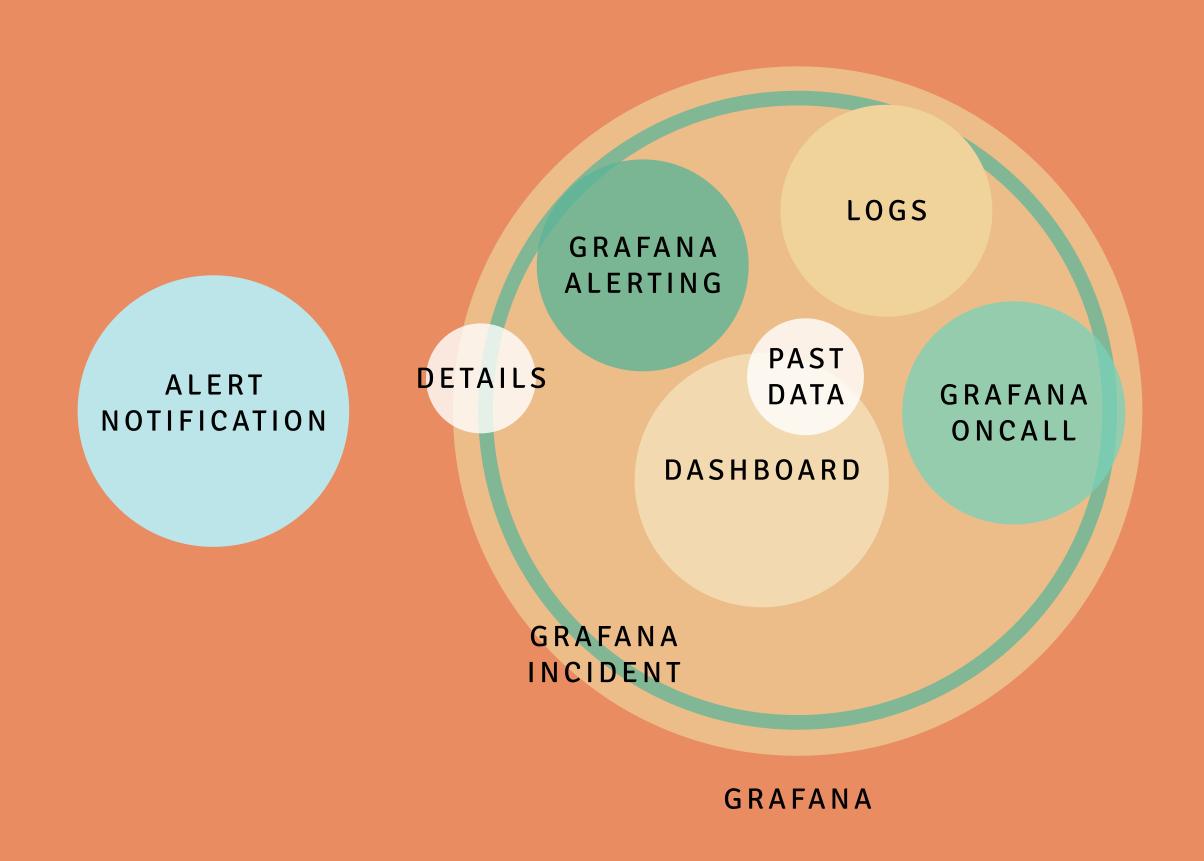




THE BACKSTORY AND LEARNINGS THAT LED TO MY SOLUTION IDEAS

#### USER'S MENTAL MODEL

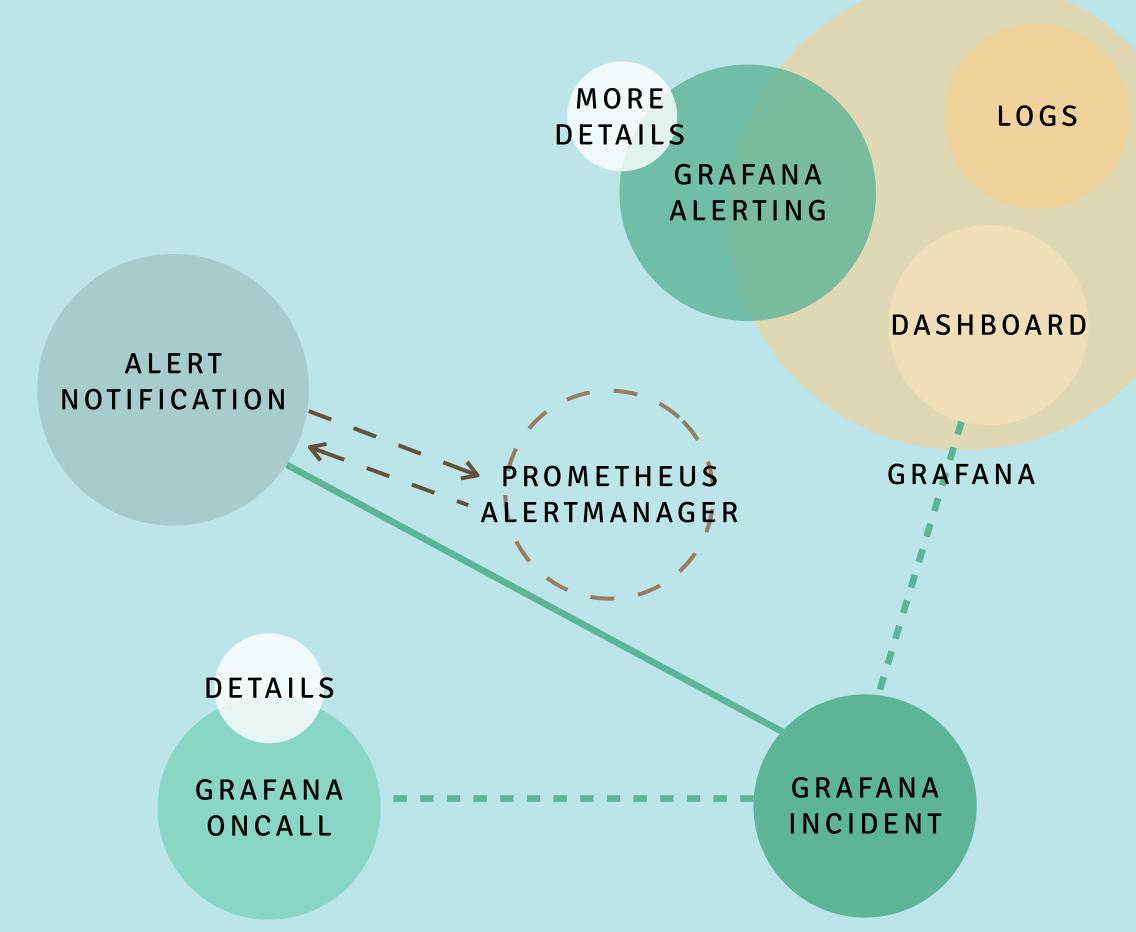
# one tool, one unified workflow



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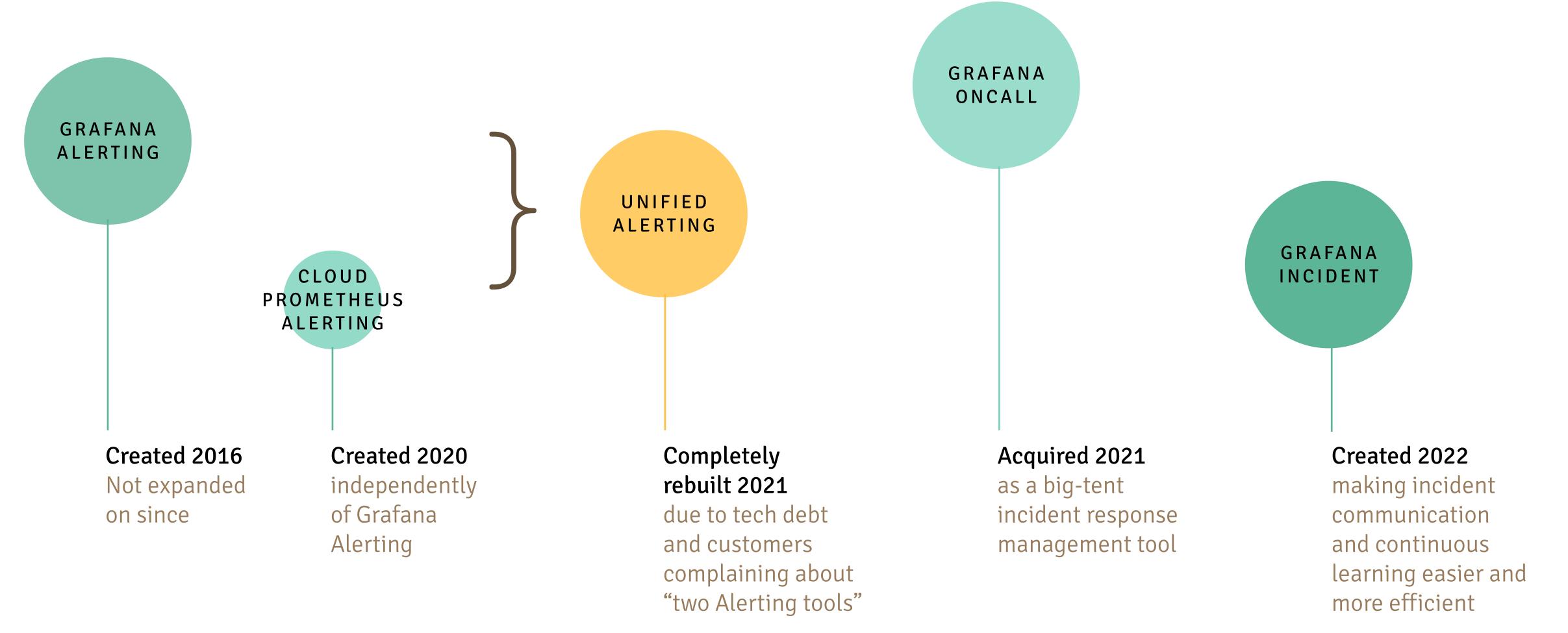
REALITY

## silos that match our org structure



#### WHY THE SEPARATION?

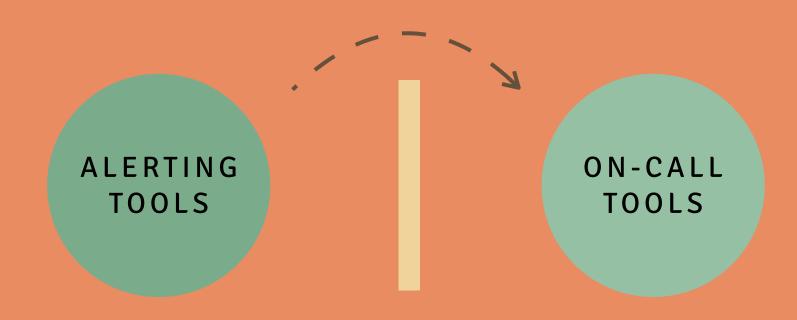






### OTHER TOOLS AND COMPETITORS

## throwing data over the fence is normal



"We don't have control over what happens in the other tool and which tools users want to combine so we cannot optimize workflows"

#### BIG TENT VS 100% GRAFANA

# do we need all those fences for the 100% Grafana workflow?





## why can't I?

- products are missing some obvious functionalities that connect IRM practices to long-standing Grafana features. Users routinely complain about them!
- while engineers can get caught up in the technical limitations of "why it works this way", users might not care
- Even Grafanistas outside of the GOps bubble don't understand most of these concepts. How would external users understand them?



7

Create alert rule from Explore

Page the right engineer on-call without setting up an OnCall alert group

opportunity to simplify and be more consistent

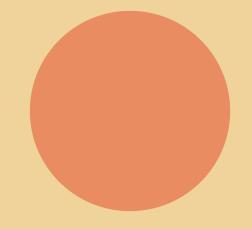


#### TOIL AND INFORMATION OVERLOAD

## why must I?

- users have to set up three products separately. This can for example mean installing a ChatOps integration 3 times.
- we don't provide instructions or guidance for setup and the general workings of the system
- users have to learn 3 separate interfaces and understand where each functionality lives, even if there are similar or overlapping concepts that appear across products
- we throw a lot of terms and options at the user without optimizing for their use cases and needs





opportunity to simplify the information architecture



Persona-based, unified views of interfaces



## challenges

that I have experienced in my work

#### PEOPLE

- Stakeholders in timezones from Singapore to California
- Everyone is opinionated and biased in favor of their product
- The rest of Grafana Labs have no clue what we are building or how these tools work. Even Grafanista engineers on-call struggle to use our tools

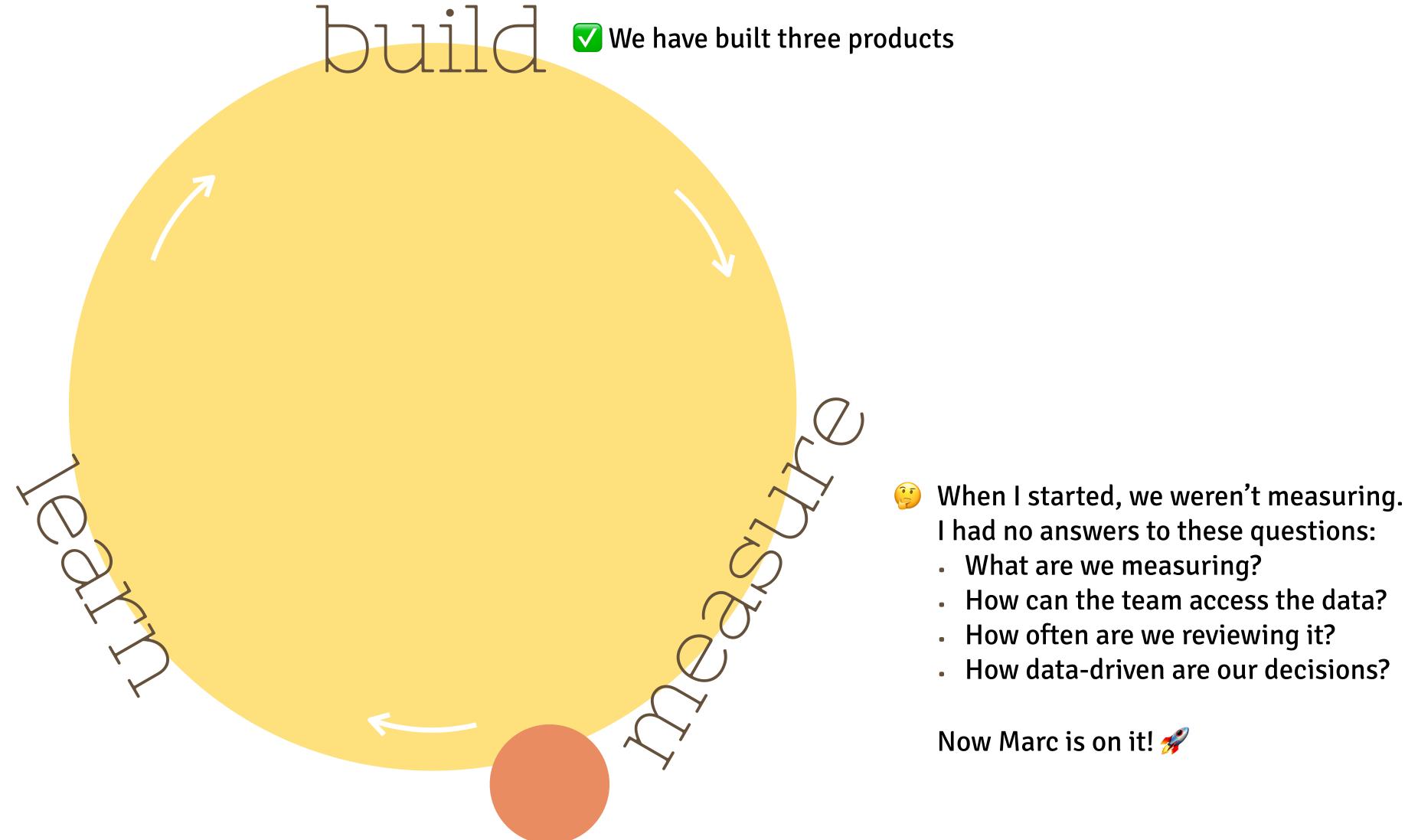
#### PRIORITIES

- Big technical differences between the Ops products that made it hard to unify them
- Customer escalations can get in the way of solving UX debt
- Engineers are caught up in the technical workings of our products, while users are probably not going to understand them and are focused on just accomplishing their tasks

#### BUSINESS

- Biggest customers have not even adopted
   Alerting, let alone Grafana's other IRM products
- The key customer that the unified product would address wasn't clear in the beginning of the project





I started here

## I FURTHER EXPLORED THE PROBLEM

#### jess designs .it

#### stakeholder interviews

15 stakeholders from 4 of 5 Ops products

#### key customer workshop

with Product and management stakeholders to identify the target audience for the GOps products

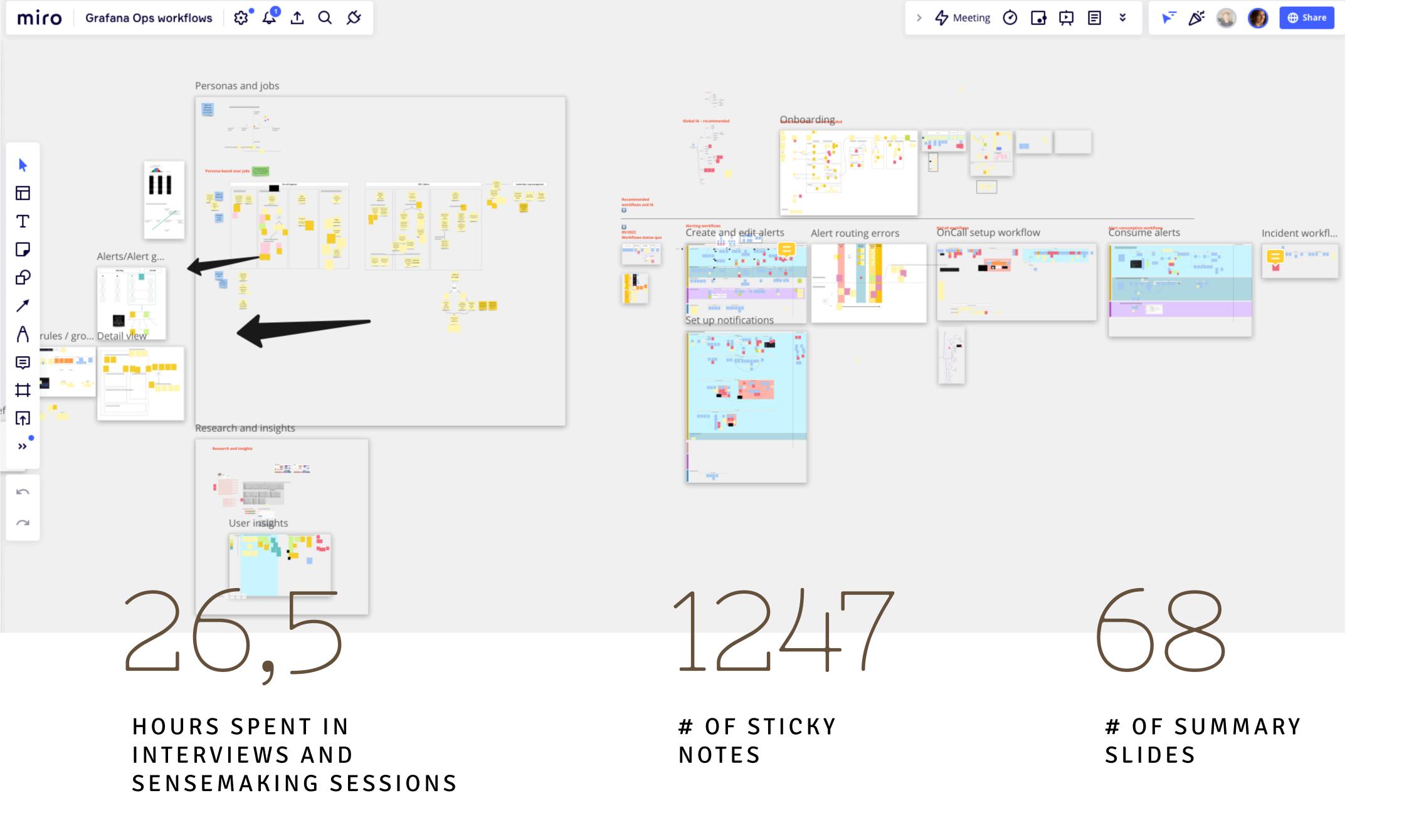


7 Grafanistas from different roles, many of them not directly involved in building GOps

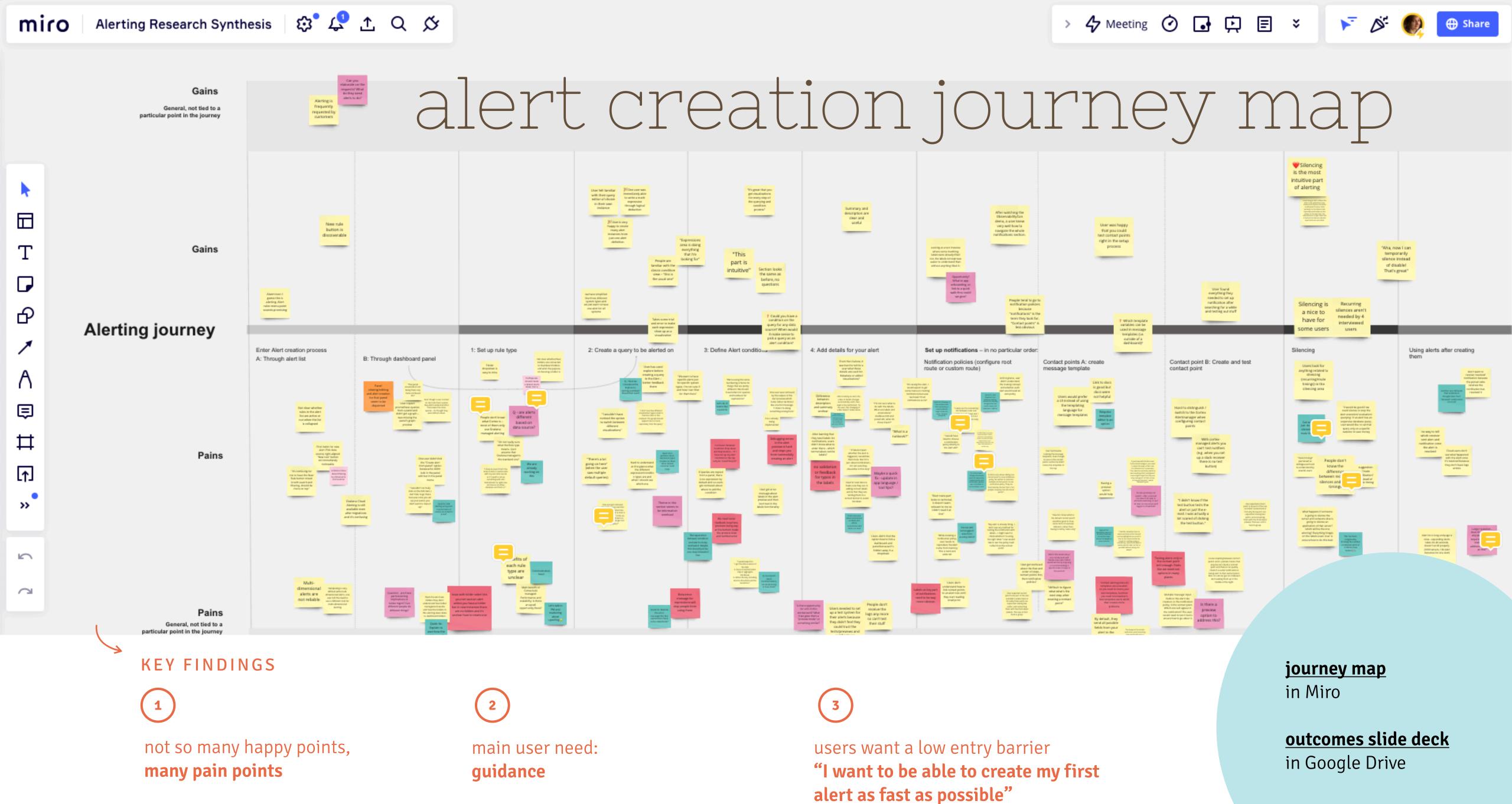


#### alert creation usability tests

8 usability studies, 1:1 sessions with external users, both OSS and Cloud



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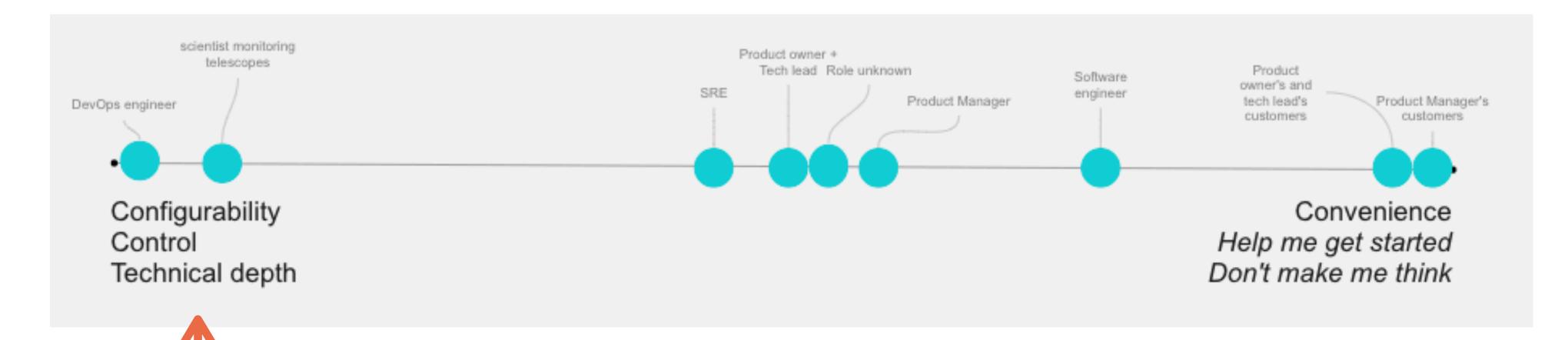




#### DOES THIS REMIND YOU OF SOMETHING?

what users want

OUT OF THEIR
ALERTING PRODUCT
EXPERIENCE

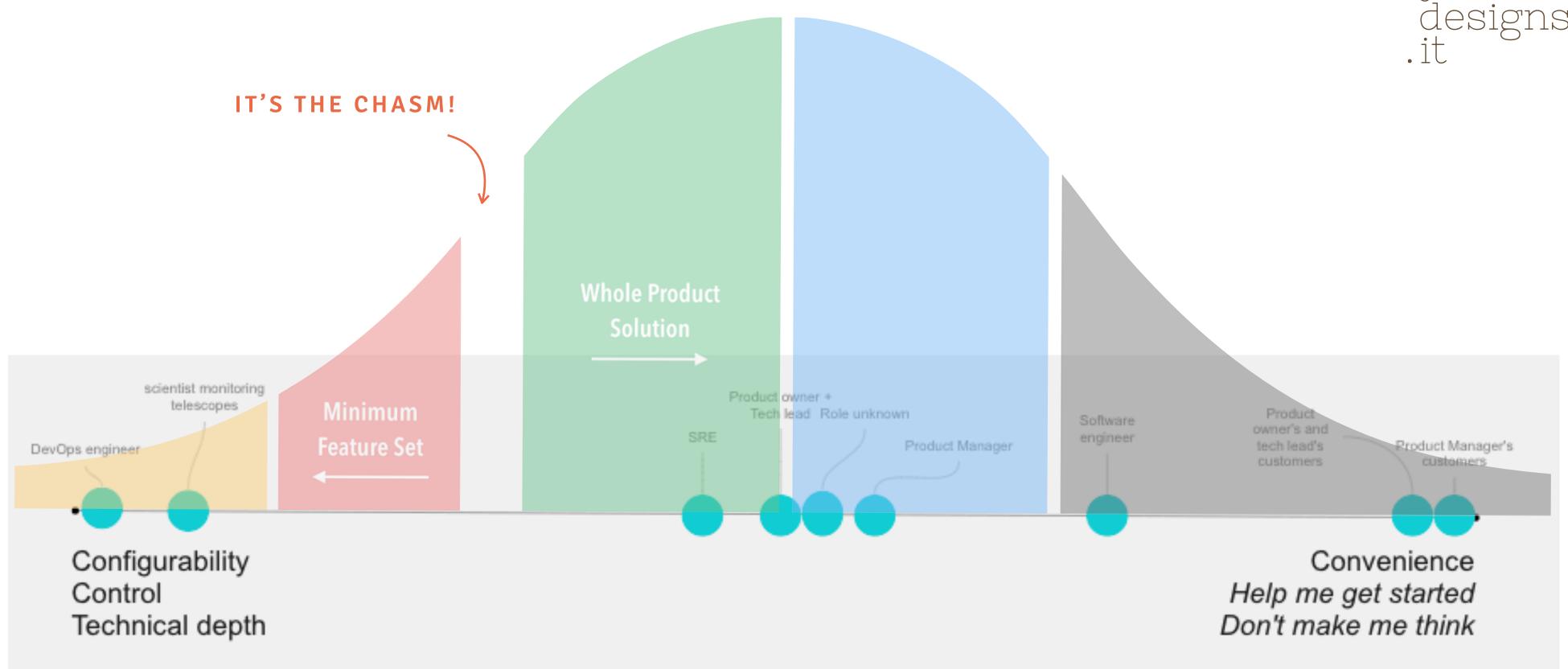


what we're offering

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what users want

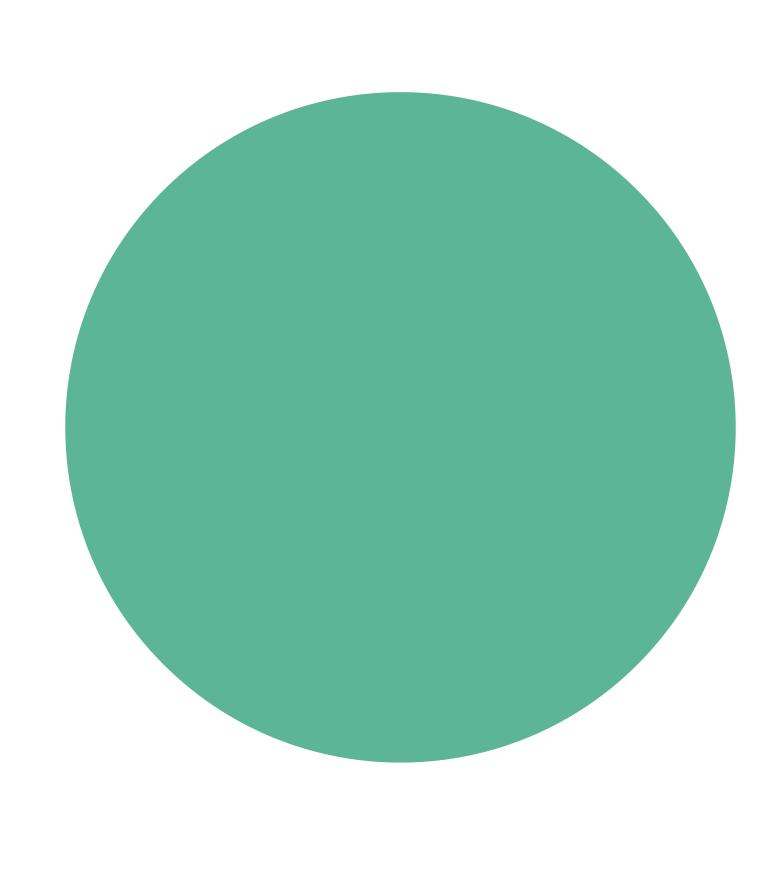
OUT OF THEIR ALERTING PRODUCT **EXPERIENCE** 



what we're offering

"maybe 10, 15min tops"

TIME A NEW USER WOULD SPEND TRYING TO FIGURE OUT GRAFANA ALERTING\*



<sup>\*</sup> According to the users in the usability tests



#### MAIN THEMES

## user confidence

- Make sure people trust the system 100%
- People won't trust something they don't understand
- Documentation, error feedback, ease of use need to be great to accomplish this

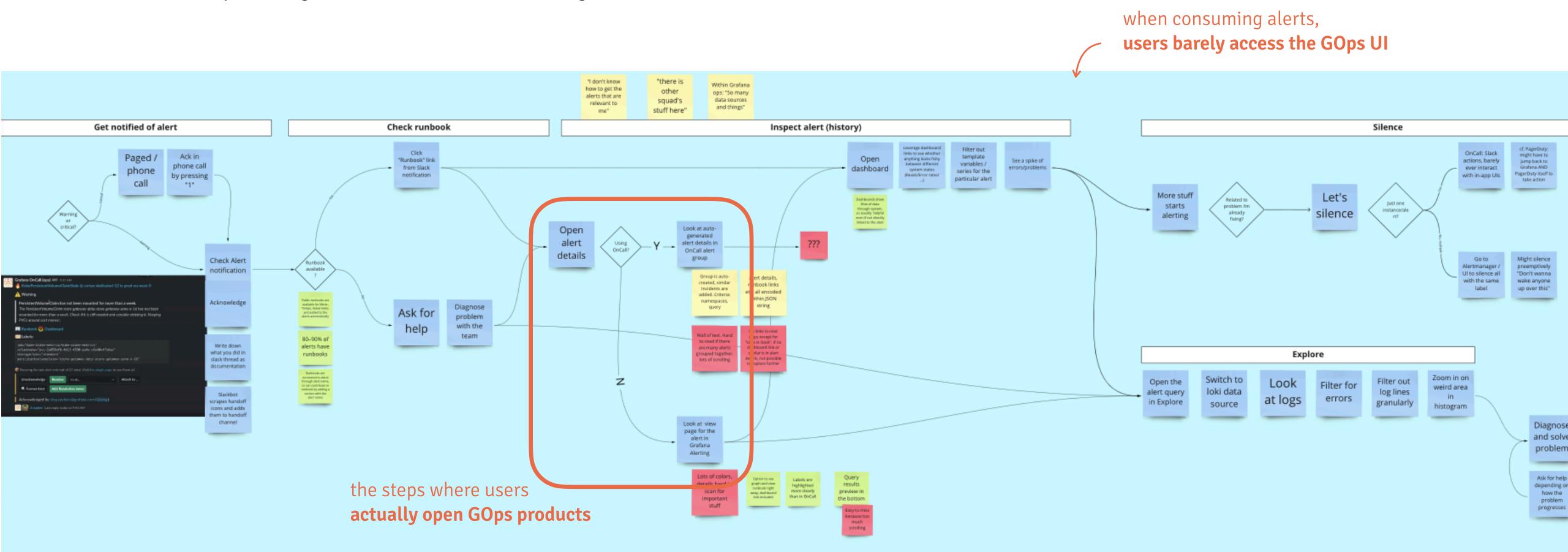
# less is more

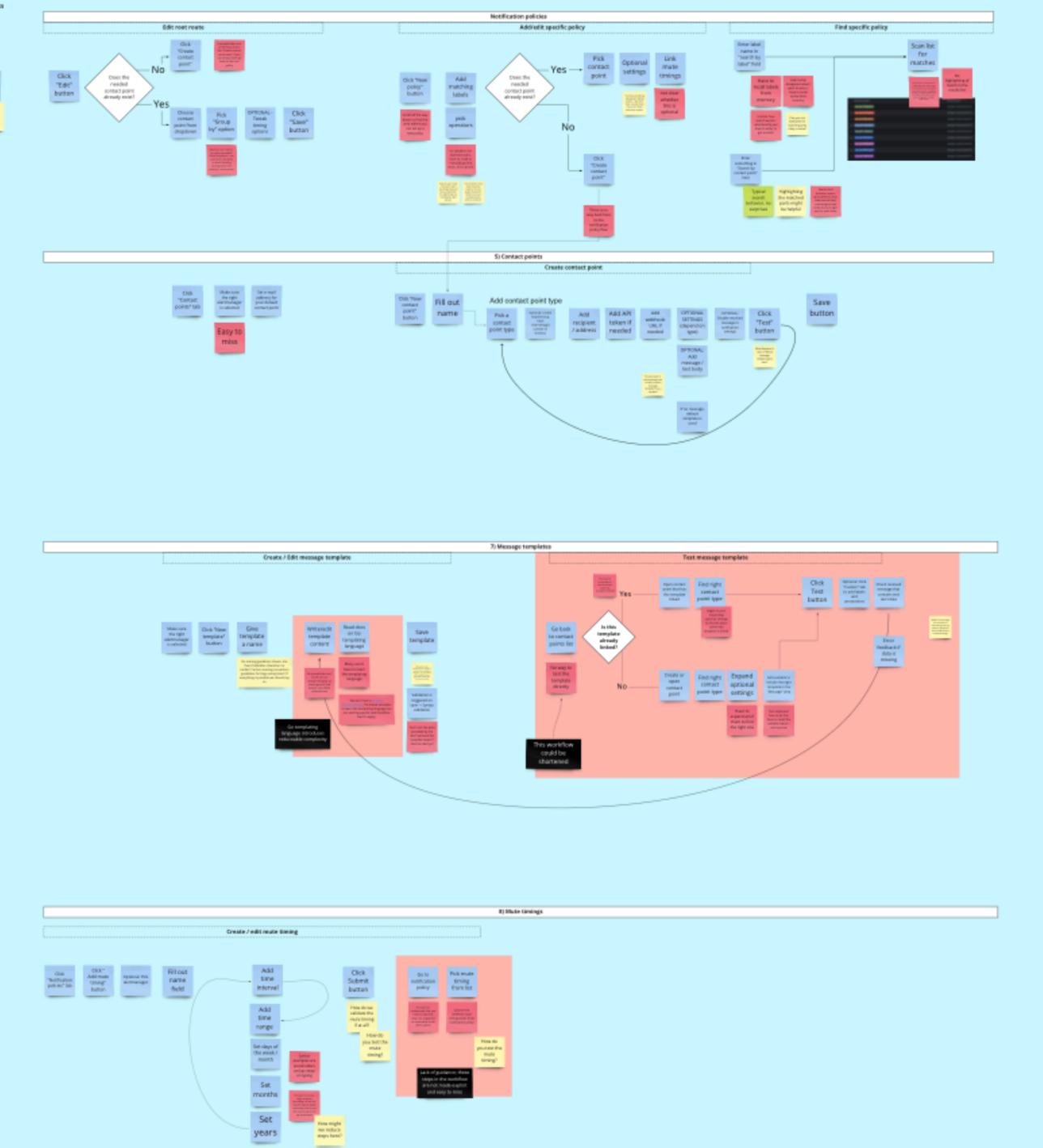
- almost all of the users got lost in details during alert creation and didn't successfully complete the task within the research session
- "there's a lot going on here"
- one user didn't even find the "New alert rule" button
- "I want to start from useful basic alerts, advanced usage can be figured out later" a SRE during user research

#### MAIN THEMES

## workflow # interface

- The way users interact with and investigate alerts does not align with our tooling
- Users only access bits and pieces of Grafana when they consume and manage alerts
- We don't help users figure out in which order to do things







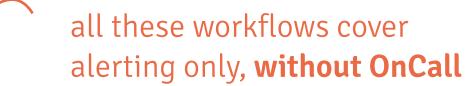
#### MAIN THEMES

## notification management is problematic

red stickies and areas are
UX problems and toil



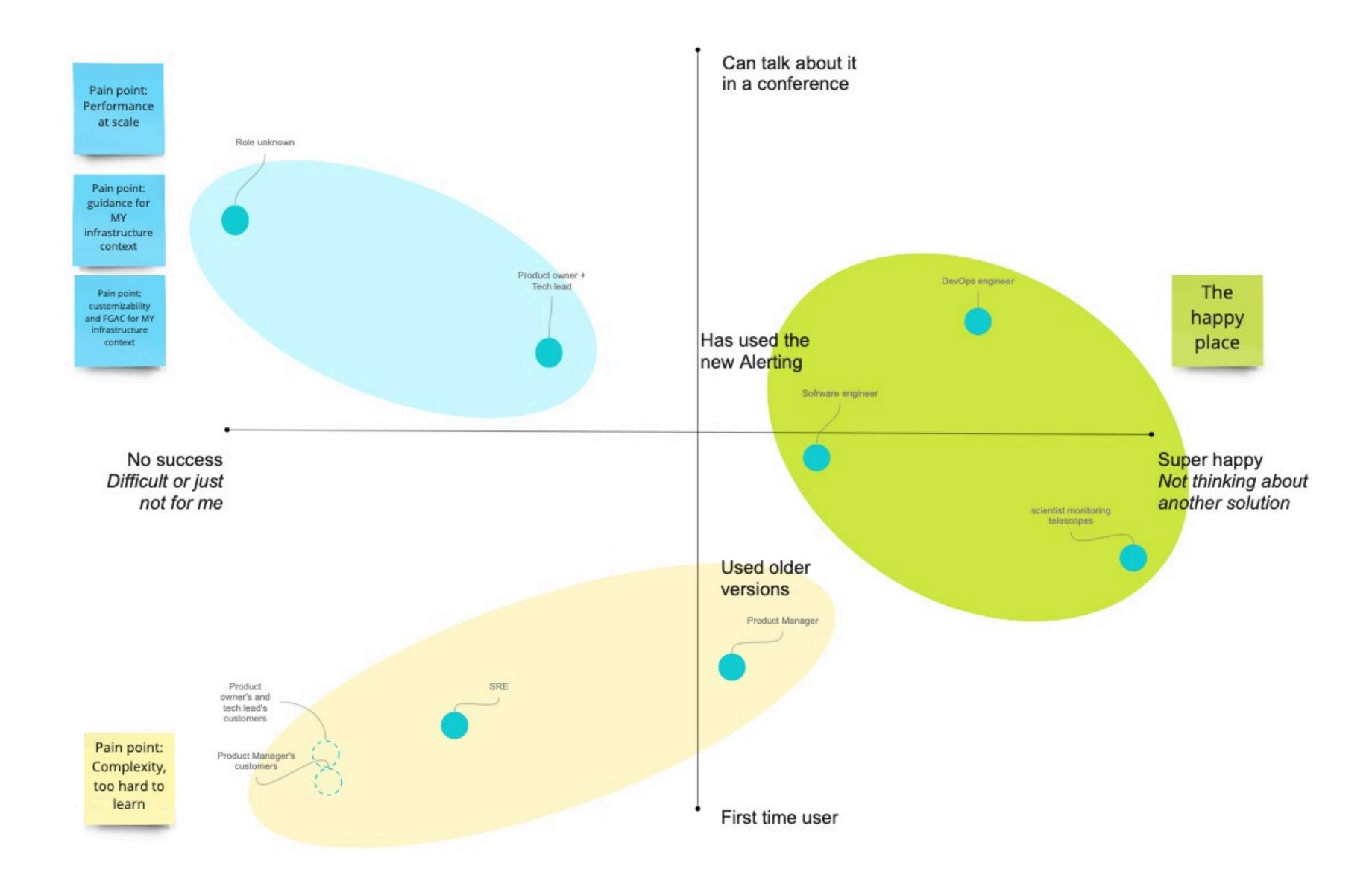
multiple workflows that are lengthy, not clear which are necessary vs optional



full workflow map in Miro

## multiple personas with varying needs

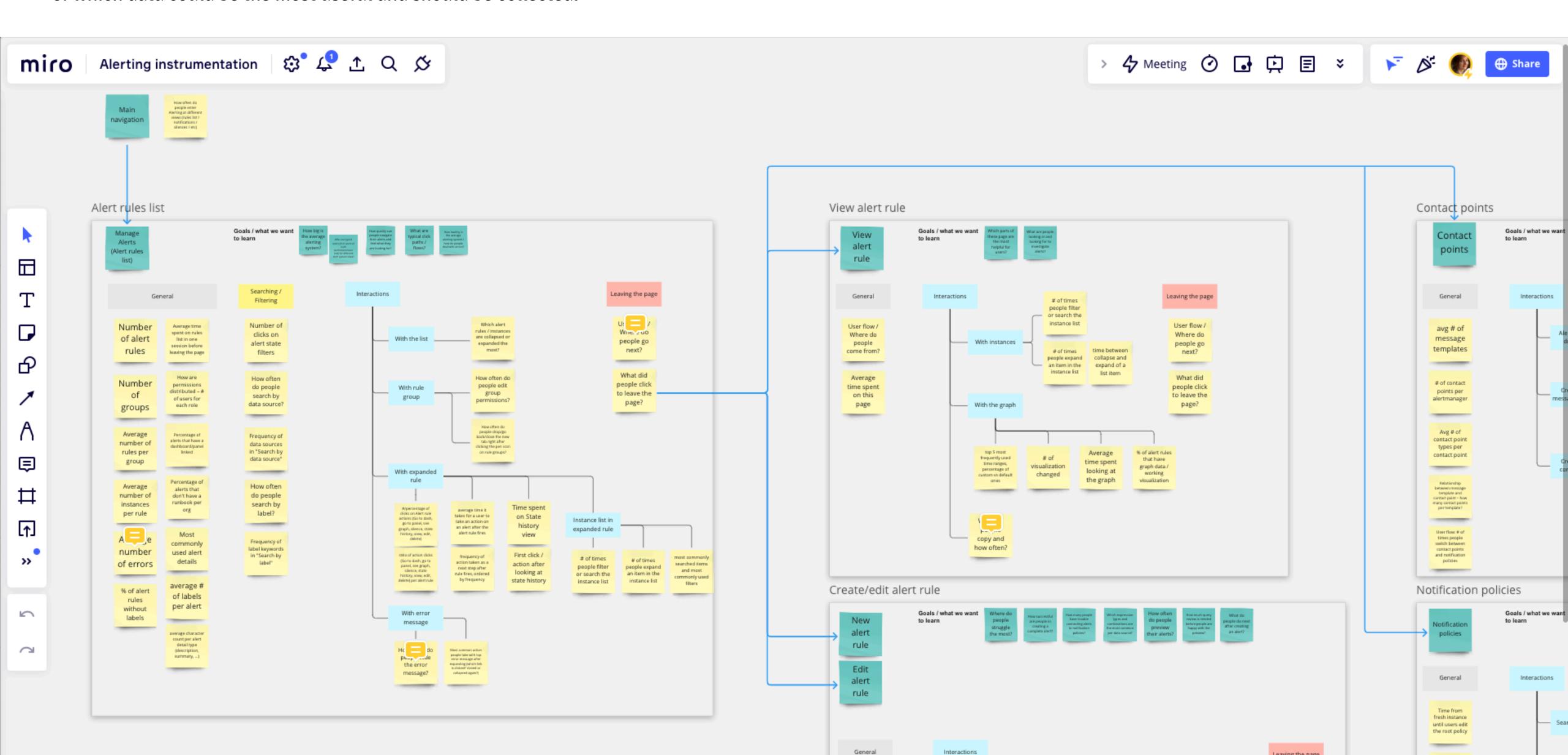
#### HAPPINESS OF TEST USERS VS EXPERIENCE WITH GRAFANA ALERTING



#### I PREPARED A STRATEGY TO START COLLECTING MORE USAGE DATA

jess designs it

Mapping out metrics to collect for each page and view, I provided the team with a summary of which data could be the most useful and should be collected.



#### jess designs .it

## insights

we know the weakest points

setup is hard even for Ops experts

fuzzy understanding of value propositions

every stakeholder said something else

shared idea of UX requirements

stakeholders mentioned the same characteristics that a successful UX should have

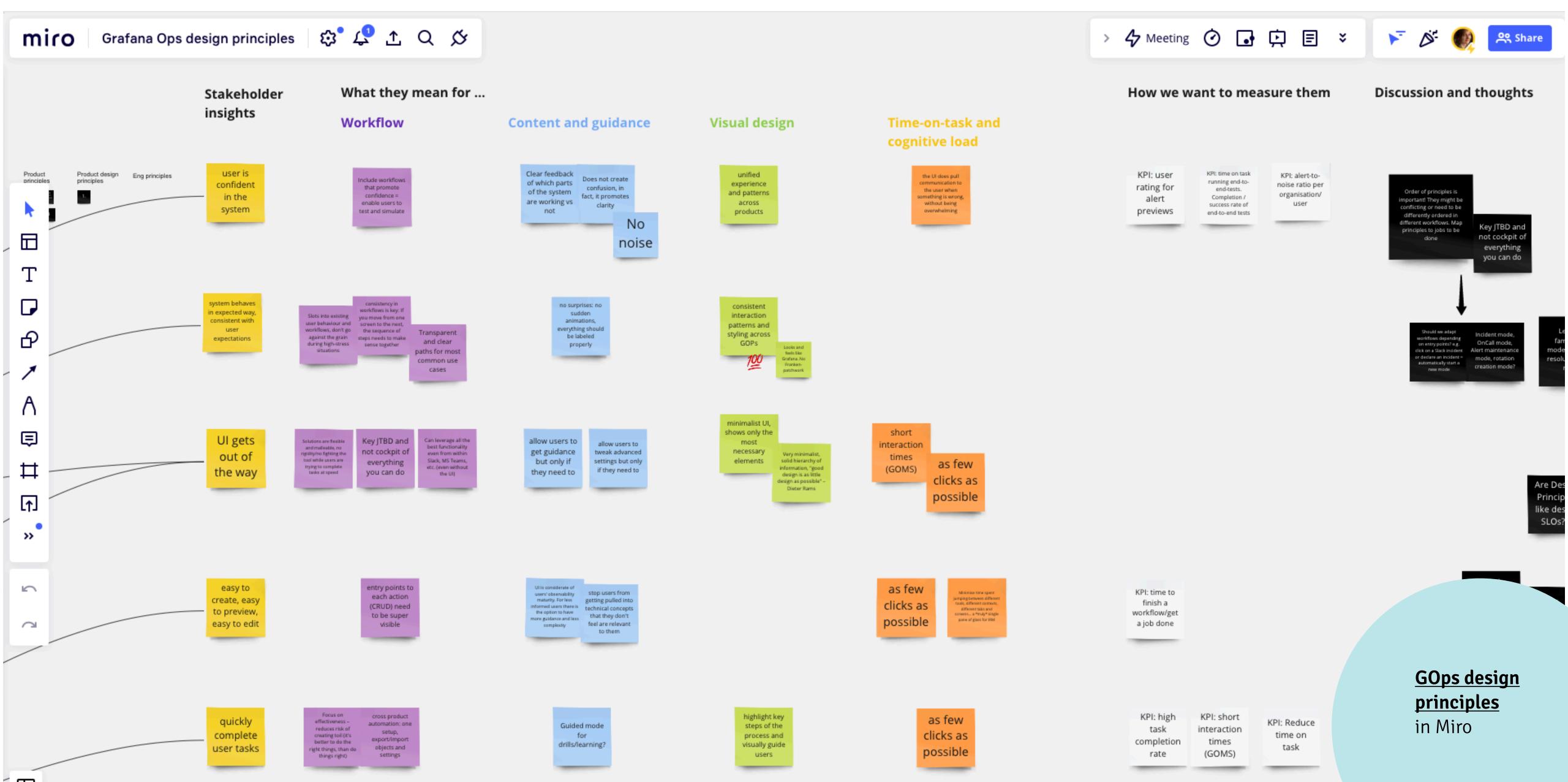
the team is biased

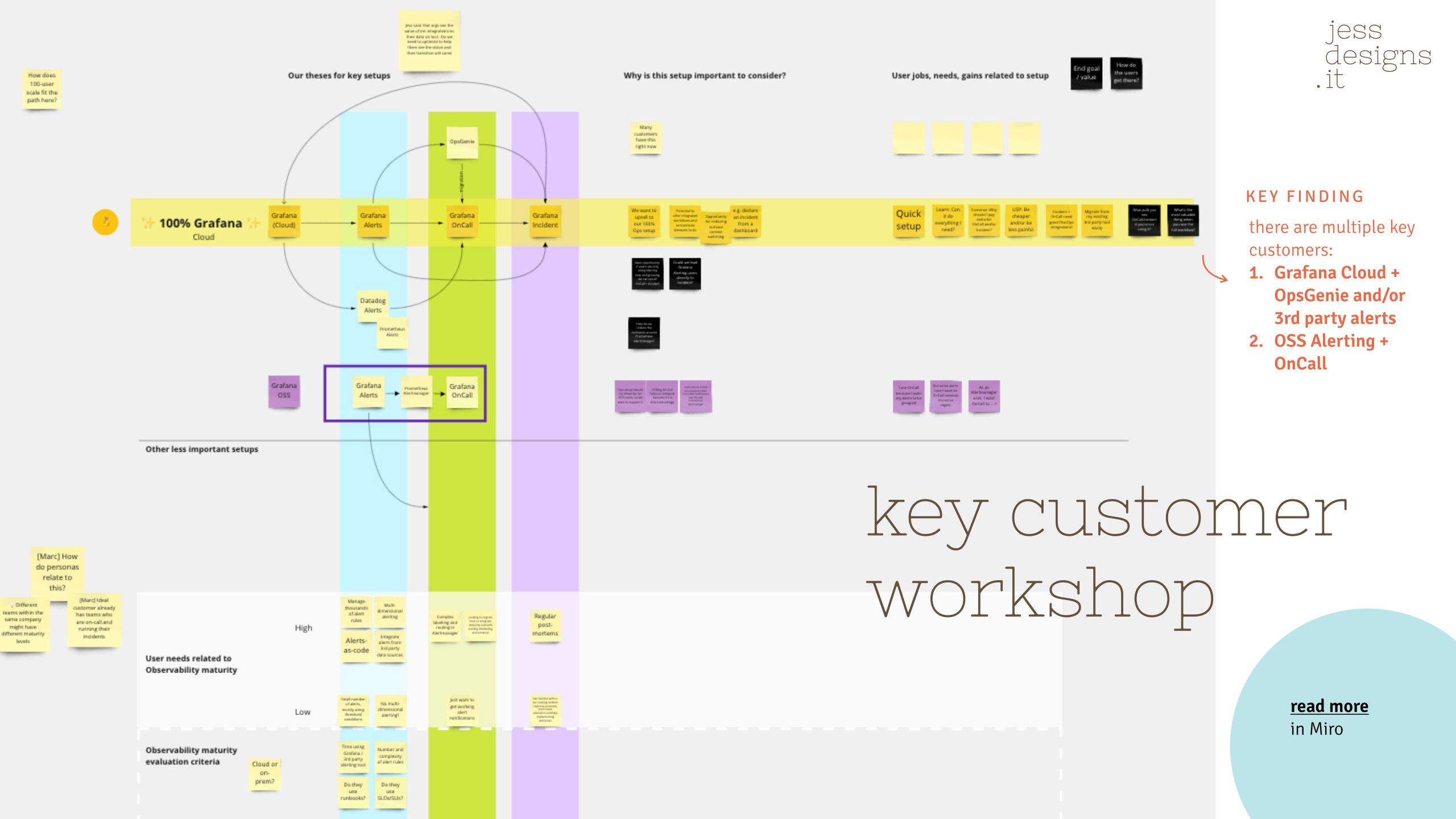
on average, stakeholders were only expert in 1 of 3 tools

outcomes slide deck in Google Drive

## I FACILITATED A WORKSHOP TURNING STAKEHOLDER INSIGHTS INTO DESIGN PRINCIPLES



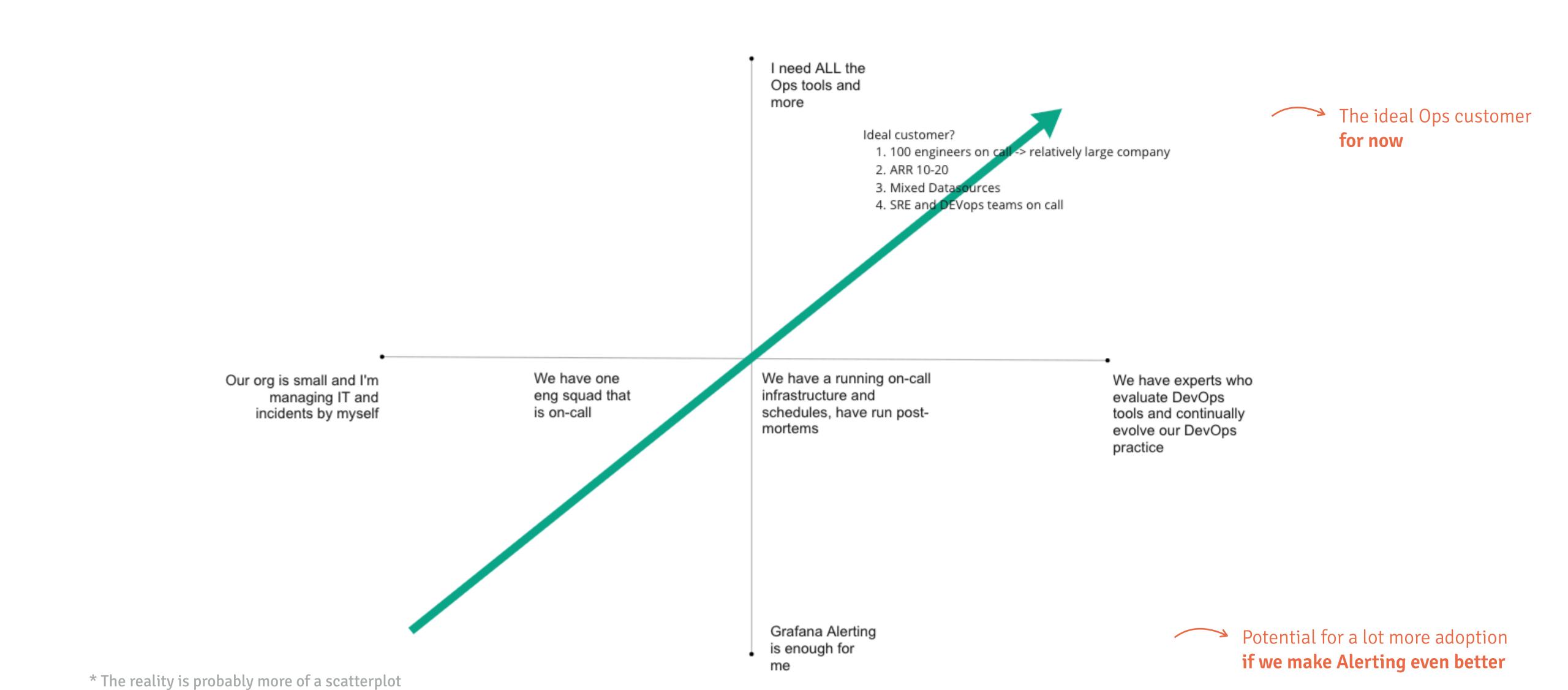




## multiple personas with varying needs



NEED FOR OPS TOOLS VS 011Y MATURITY: A THESIS\*



# bigger org # more expertise

"WE'RE AT THE VERY BEGINNING OF IMPLEMENTING SLIS AND SLOS AT WELLS FARGO" \*

<sup>\*</sup> Quote from SLO project exploratory research conducted by Mitch Seaman and Nadine V.



## user baselines

#### NEEDS VARY DEPENDING ON EXPERIENCE

Minimo

THE OSS USER

Whole Product Solution

(2)

THE CLOUD USER

3

THE FRESH STARTER

**Experience with Grafana tools** 

**DevOps maturity** 

Prometheus expertise

Tooling needs

**Expected complexity** 

		little to none
	some	little to none
	some	none
"I want the best tool for each part of the job. I mix-and-match and put in the work to get there"	"I want Grafana to do as much as possible for me"	"I just want a simple alert that I can set up without reading a guidebook"
show me ALL the settings	simple at first, willing to learn more	simple and quick

## WITH ALL THIS KNOWLEDGE, I DESIGNED SOLUTIONS



#### design and deliver

flows, mock-ups, wireframes, prototypes

brainstorm and ideate

with domain experts about naming, docs, UX

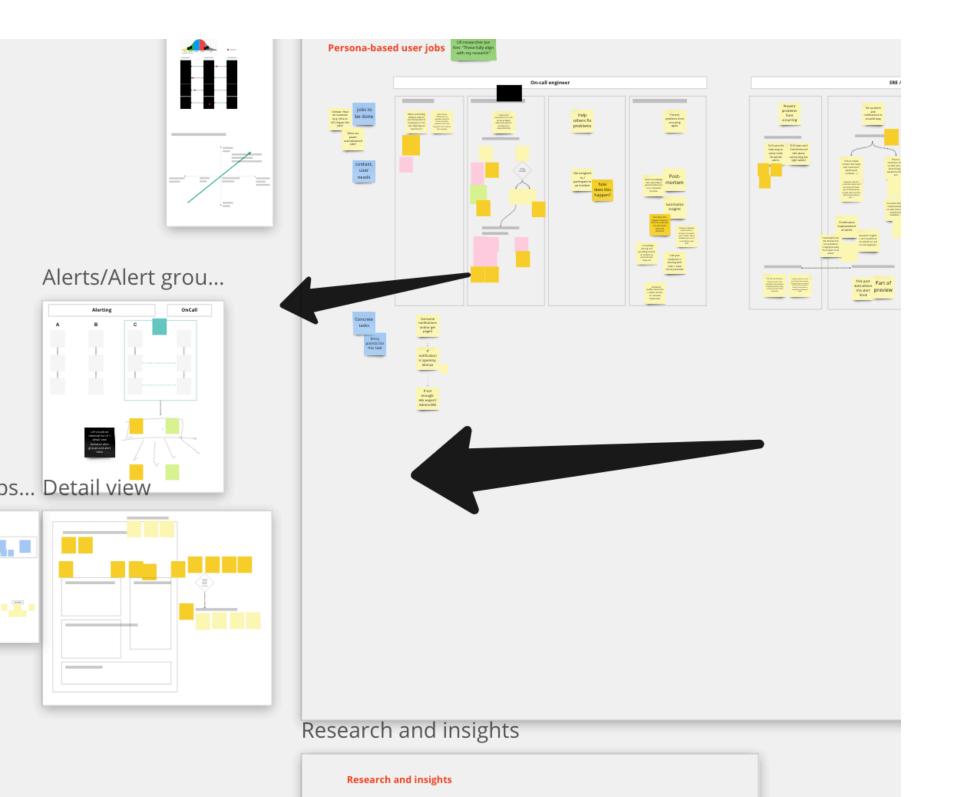
#### the future

implementation,iterations andusability testing

## brainstorm and ideate

I generated ideas with cross-functional stakeholders and then polished the diamond using UX expertise.



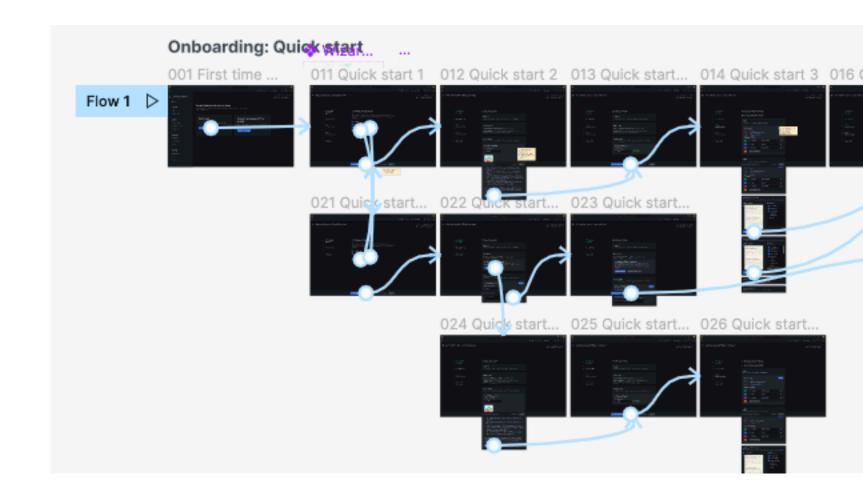




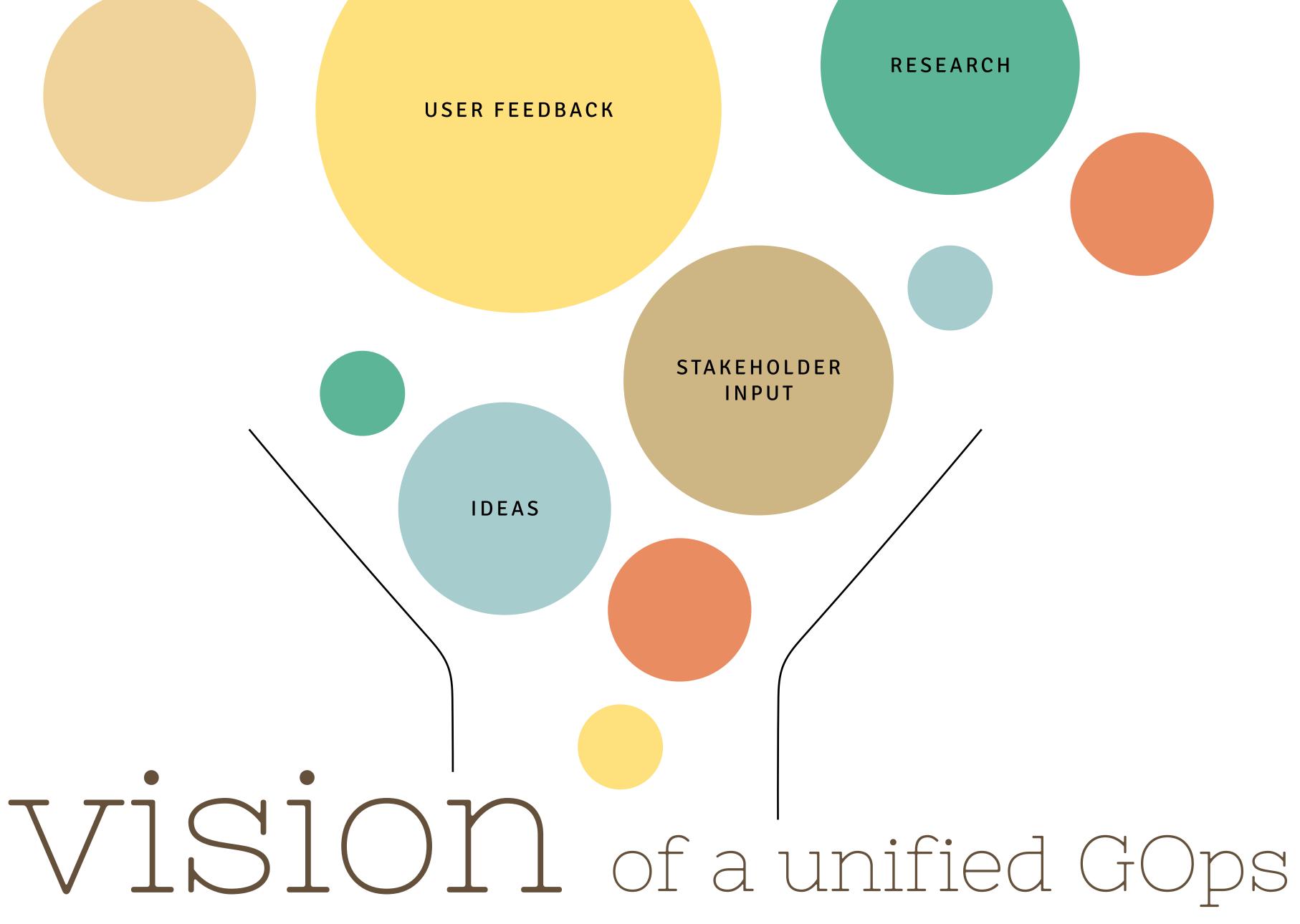


Unified lists for alerts and incidents    Jessic    25 min   I want to reduce list complexity in GOps by optimizing for user personas and jobs. I still have nuts to crack. Please help me come up with good solutions:)    Problems that I am trying to solve:							
<ul> <li>1. View modes? <ul> <li>How to switch between them?</li> <li>How to mitigate potential problems?</li> </ul> </li> <li>2. Displaying filtering and grouping <ul> <li>How to visualize label grouping?</li> <li>How to highlight active filters? Should there be grouping by filters other than labels?</li> <li>Should we allow users to group by whatever they want? How to figure this out?</li> </ul> </li> <li>3. Distinguishing between similar but different element types <ul> <li>OnCall alert group vs Alerting alert rule vs alert instance</li> <li>Will users care?</li> <li>4. Implications for information architecture</li> <li>Could we have one alert list that is not tied to product buckets?</li> </ul> </li> <li>What kind of feedback am I looking for: <ul> <li>Ideas and good practices</li> </ul> </li> <li>Discussion – use ✓ to show what has been discussed</li> <li>[Amy] Unified list – this makes sense to me as a way of simplifying. But I'm getting tripped up on the difference between folders and groups – is this actually different?</li> <li>[Jess &amp; Rob] architecturally this is actually different</li> <li>But we all agree that users don't actually care – they are just trying to get their job done.</li> <li>[Luke] Folders – most customers use this as a way to organize resources so we probably shouldn't move away from them. They are also used for access control.</li> <li>Looking at the github-style filtered list <ul> <li>Tricky to be clear about an alert rule vs. group vs. instance</li> <li>[Luke] Like the wireframe approach – this is a good starting point for explorations. If we</li> </ul> </li> </ul>	alerts and	Jessic	25 min	GOps by optimizing for user personas and jobs. I still have nuts to crack. Please help me come up with good			
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					. 16		
have ways to filter we could hide some things and make it more of a search					s. If we		









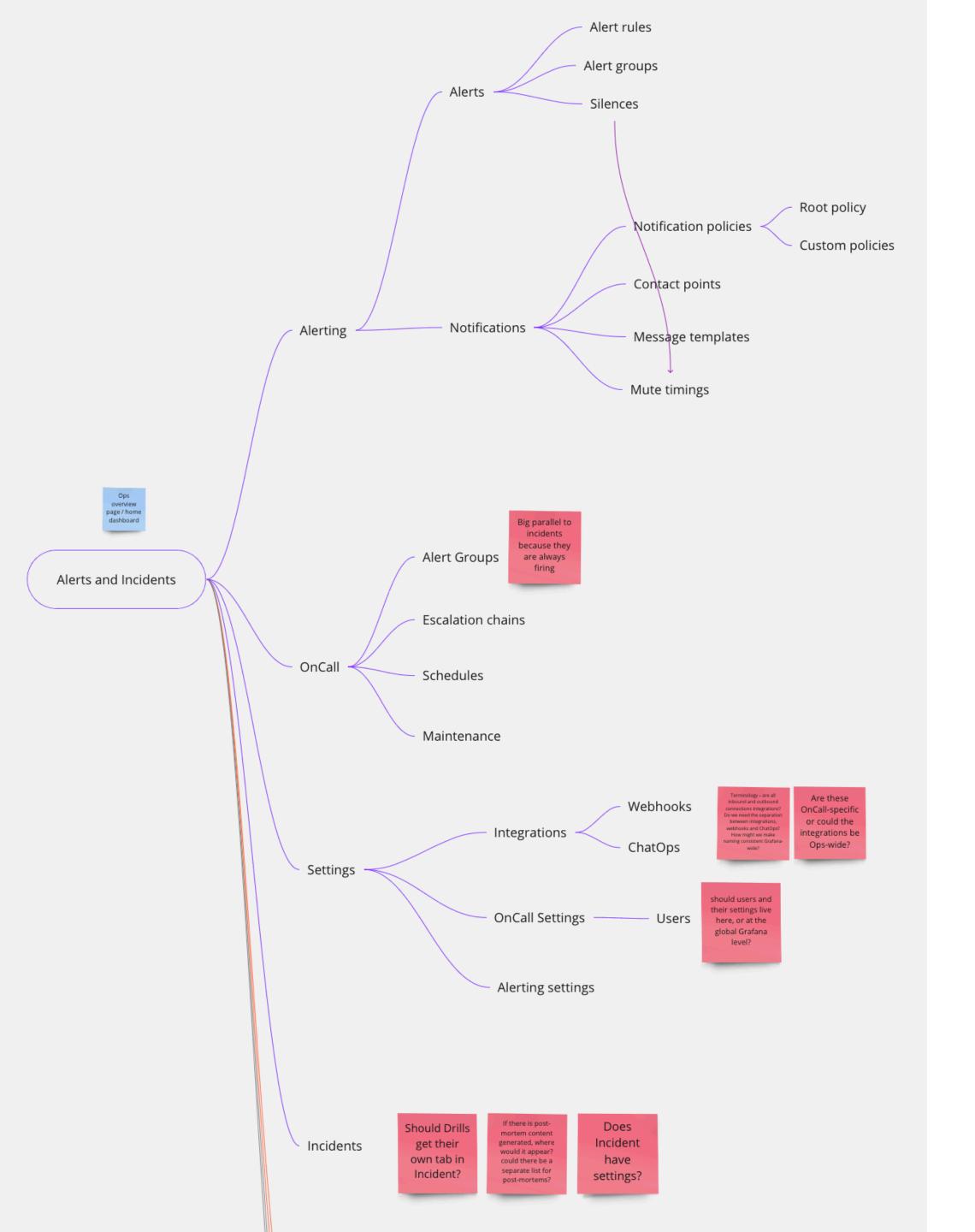
BIG HAIRY AUDACIOUS UX CHANGES I AM PROPOSING



Separation of GOps tools into plugins is caused by our org sturcture and tech reasons. It has little to do with users and their workflows and introduces user toil, e.g. when installing the same Slack integration 3 times.

#### SOLUTION

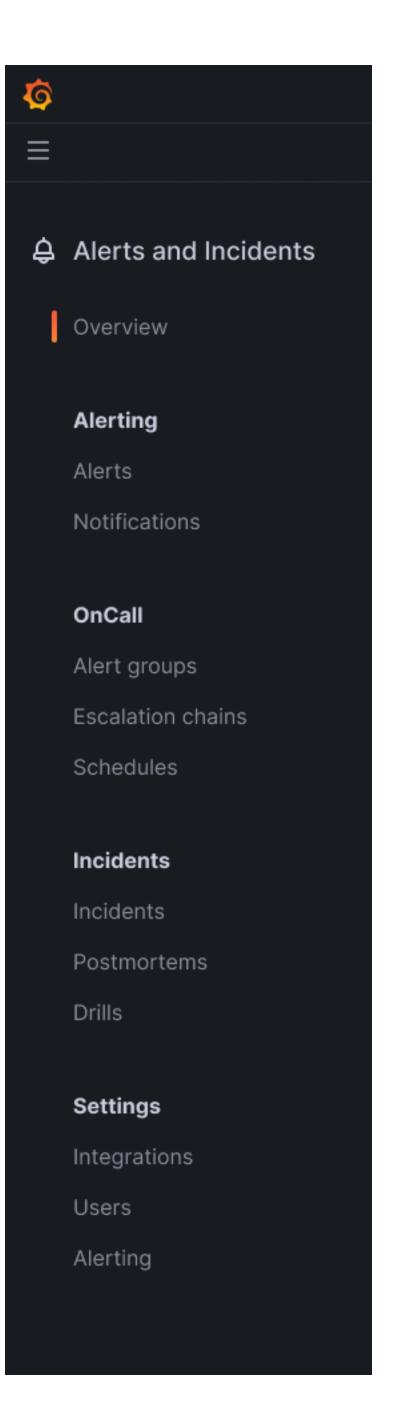
changes in information architecture



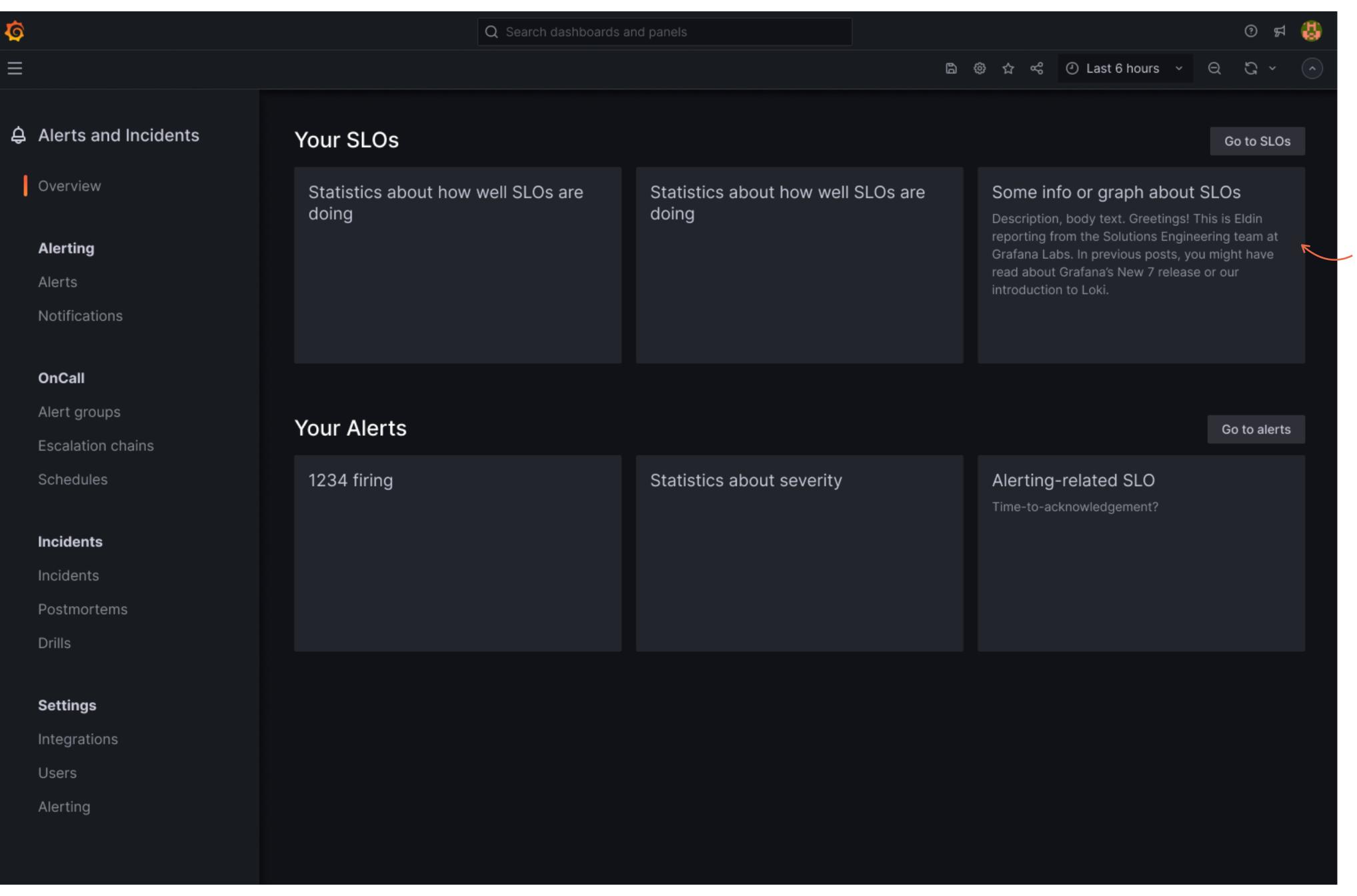
Heavily reduce amount of L1 navigation items.

Introduce a unified settings area where options can change depending on the products you have installed.

One place to integrate them all









very early proposal – needs full-fledged UX project

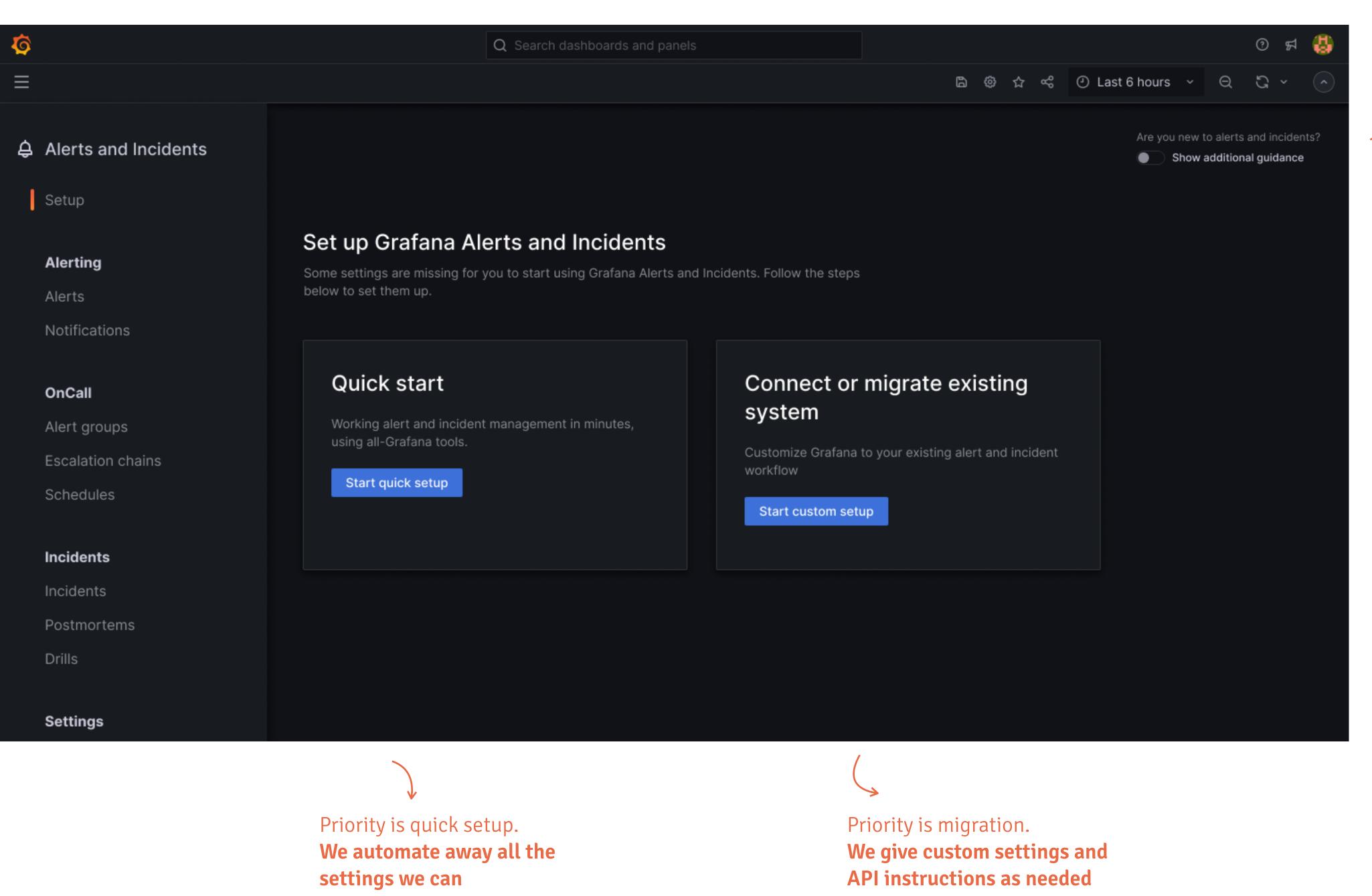
Overview dashboard that both shows the most important data of this ops system and gives quick entry points and upsell opportunities for multiple Ops products.

#### PROBLEM

We only have 10–15 mins to help users onboard to our tools. We're not providing a tailored experience that is mindful of user needs.

#### SOLUTION

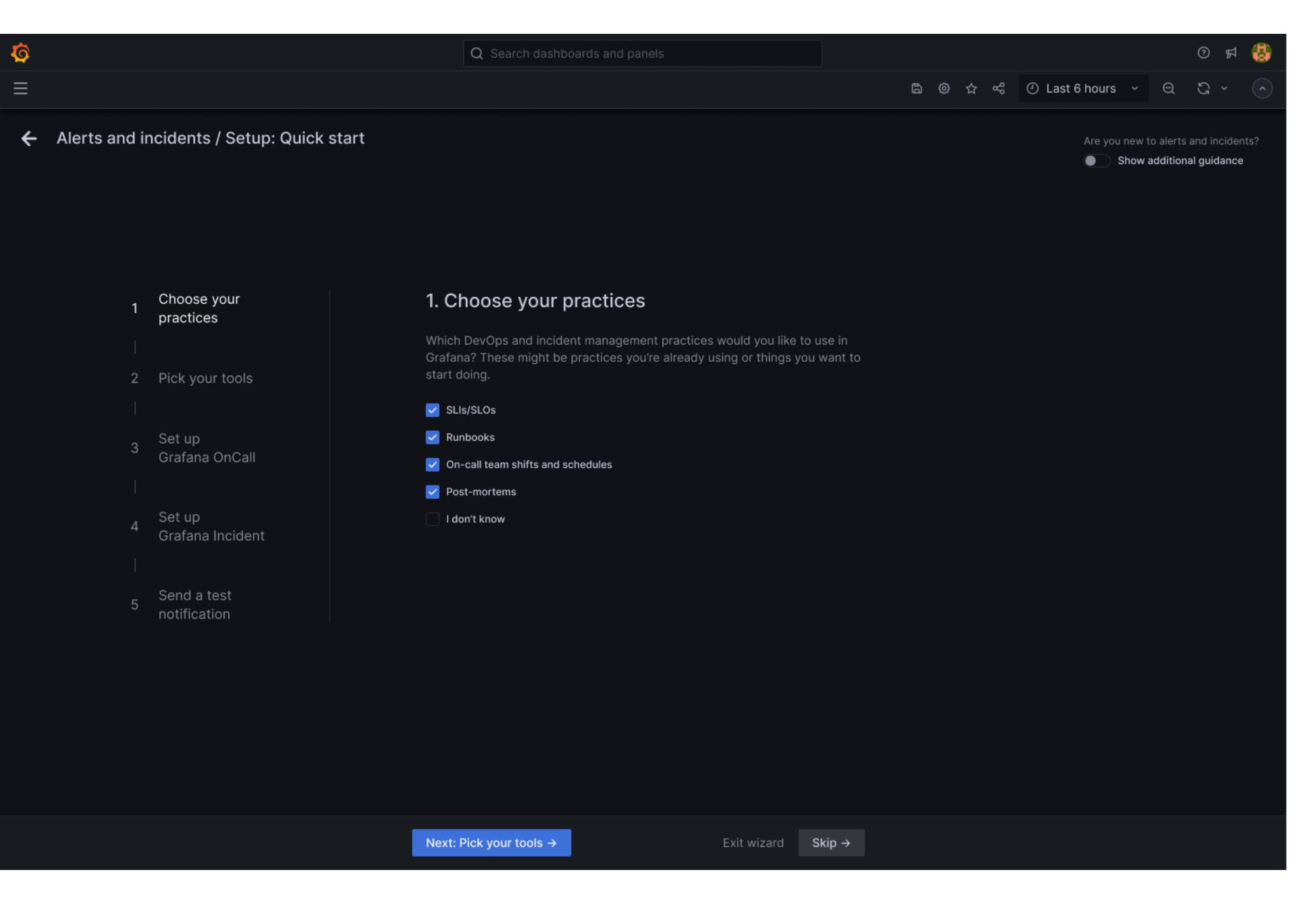
forked onboarding





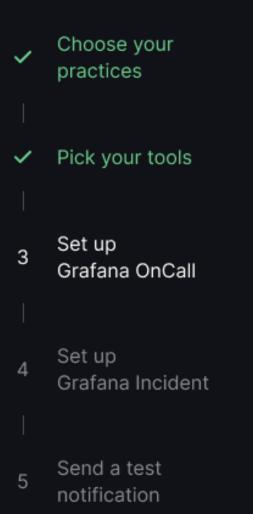
Additional guidance option for first-time users

Users who are opening the
Alerts and Incidents are for the
first time get to start their
setup flow right away, choosing
between two options catered to
key personas.

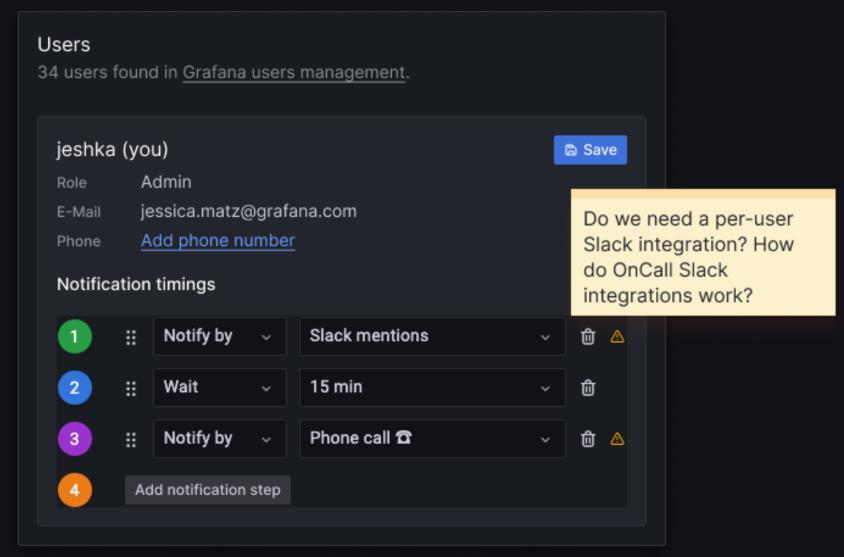


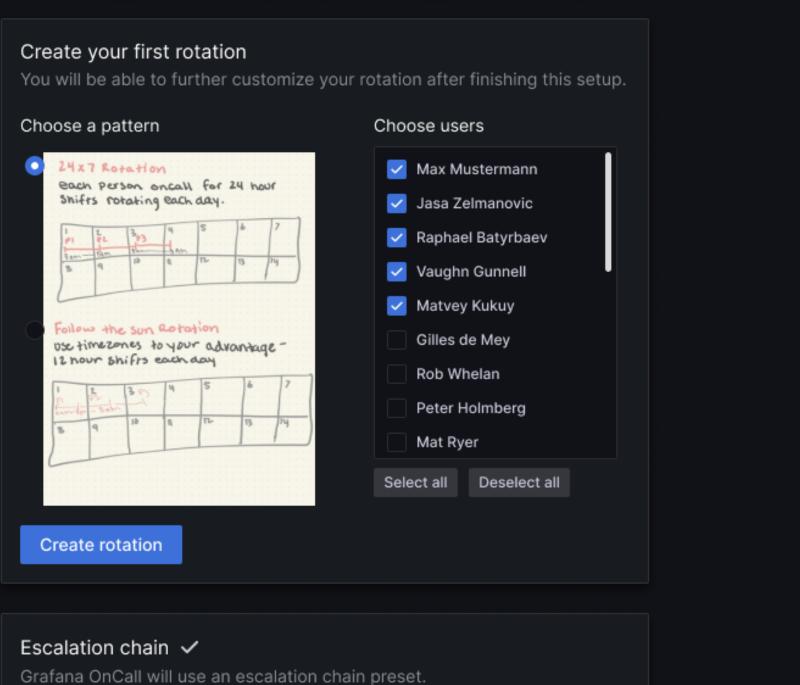


The wizard starts by asking users what they want to use in Grafana. Based on the user selection we install the matching products.



#### 3. Set up Grafana OnCall







Some questions remain that the team will pick up

Basic OnCall settings like user notification timings and an initial rotation. We use an escalation chain

Alyssa contributed the rotation pattern picker scribble that still needs to be translated to a proper mock-up

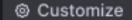
- Choose your practices
- ✓ Pick your tools
- Set up Grafana OnCall
- 4 Set up Grafana Incident
- 5 Send a test notification

#### 4. Set up Grafana Incident

#### Contact point 🗸

Grafana Incident will send notifications to MySlackOrg.slack.com. It will automatically

- · create a new Slack channel per incident with the prefix "incident-"
- post important updates and announcements to the channel
- · invite active participants to the channel



Change contact point

#### Google Workspace



Grafana Incident uses Google Workspaces to automatically create a Google Meet meeting or Google Drive document for every incident.

- 1. Click the "Install Google Workspace" button.
- Once you're redirected to authenticate with Google, enter your Google credentials associated with the account you wish to connect to Grafana Incident.
- 3. Once you're done, return back to Grafana Incident.

Install Google Workspace

#### GitHub

Connect GitHub repositories with Grafana Incident.

- 1. Click the "Install GitHub" button
- Once you're redirected to authenticate with GitHub, enter your GitHub credentials associated with the account you wish to connect to Grafana Incident.
- Once you're done, return back to Grafana Incident.

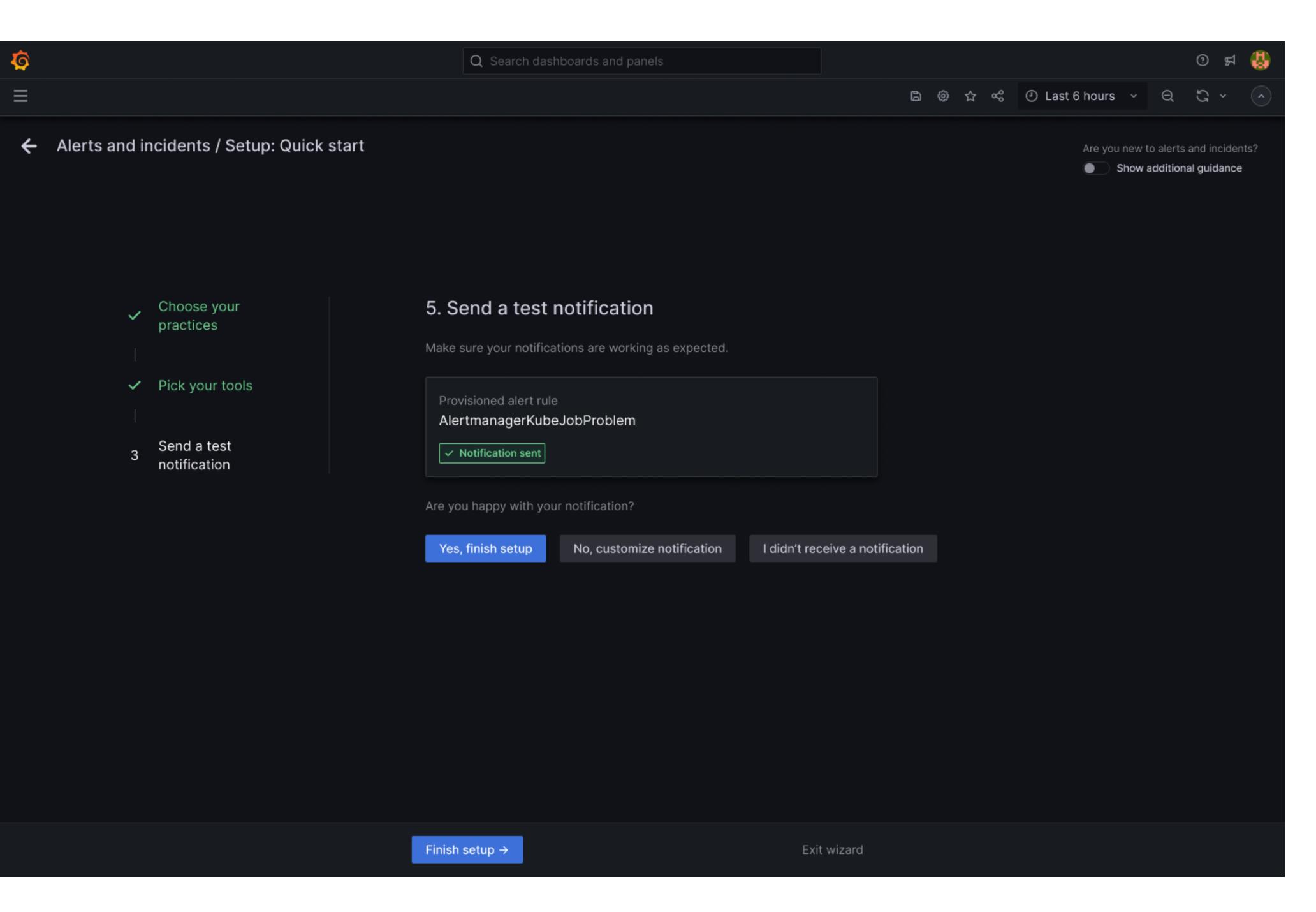
Install GitHub

jess designs it

We offer presents and defaults wherever we can

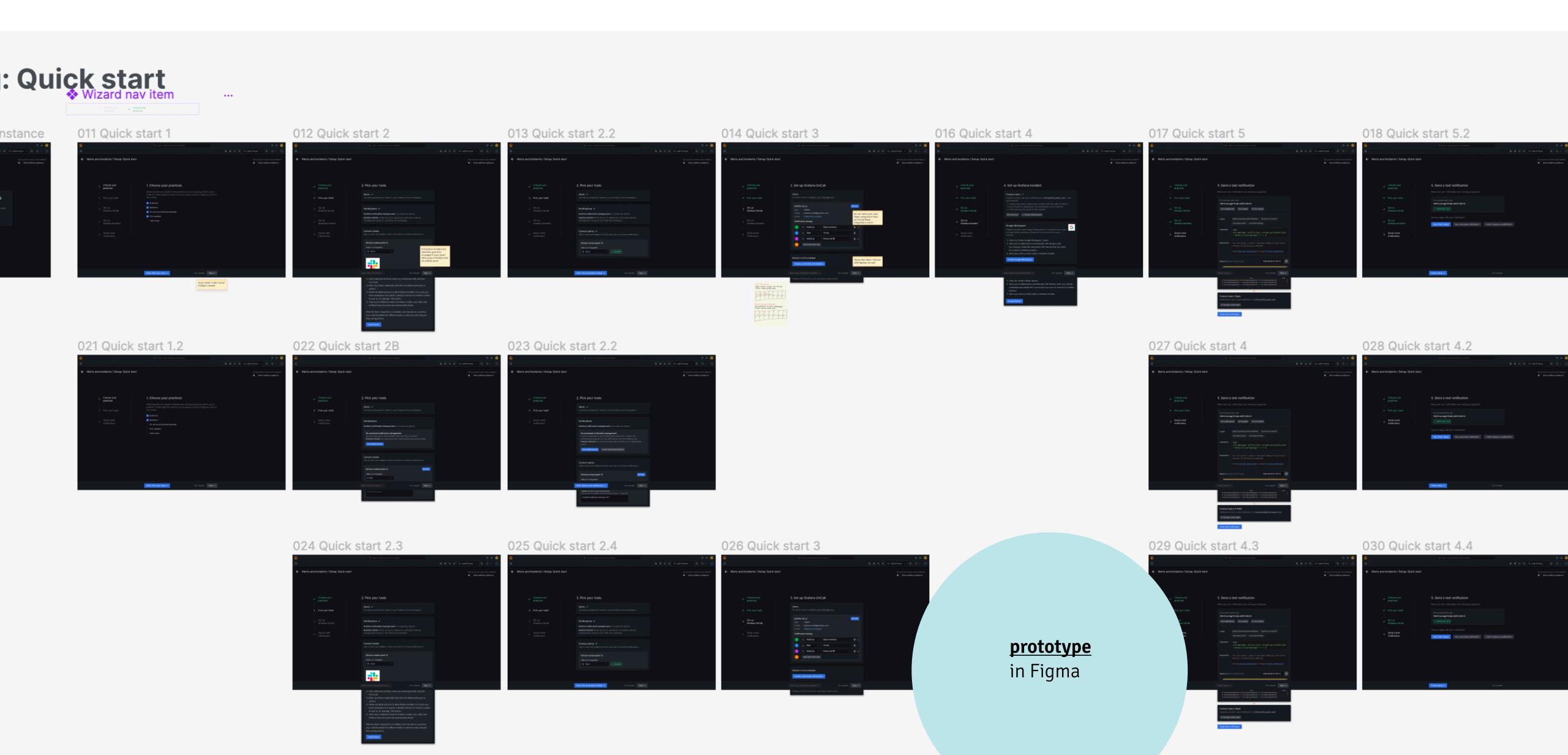
The flow is heavily inspired by Vaughn's amazing Incident onboarding flow.

However, the setup for each product is shortened to a minimum to save time.





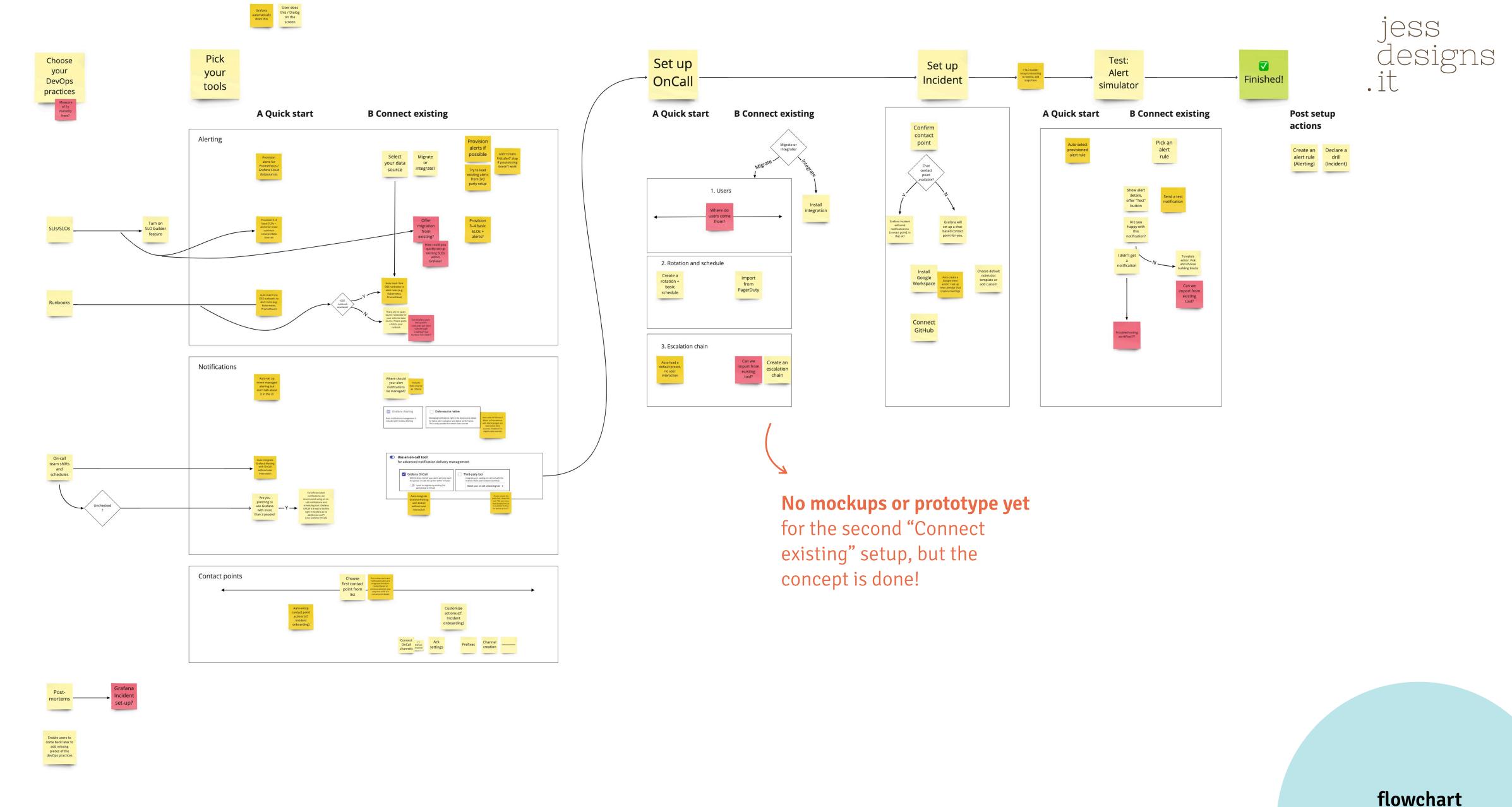
In the end, we send a test notification. If users don't like the default notification, they get the option to customize it right from the get-go.



# "connect existing" setup: automation is also key

#### AUTOMATION IDEAS

- Provision alerts for existing data if possible
- Offer migration options for top 3 existing 3rd party alerting sources?
- Provision 3–4 basic SLOs + alerts? Could existing SLOs be migrated somehow?
- Auto-link OSS runbooks to alert rules (e.g. public Kubernetes and Prometheus runbooks).
  - Allow users to paste a link to their runbook if their data source doesn't have an OSS runbook
- Import rotation and schedule from competing IRM tools (PagerDuty, Ops Genie)?
- Import escalation chain from existing tool?



Extra guidance for new users

want to set

up Grafana

Ops?

Quick

start

Working alert and incident management in minutes, using all-Grafana tools

OR

Connect or migrate existing system to Grafana





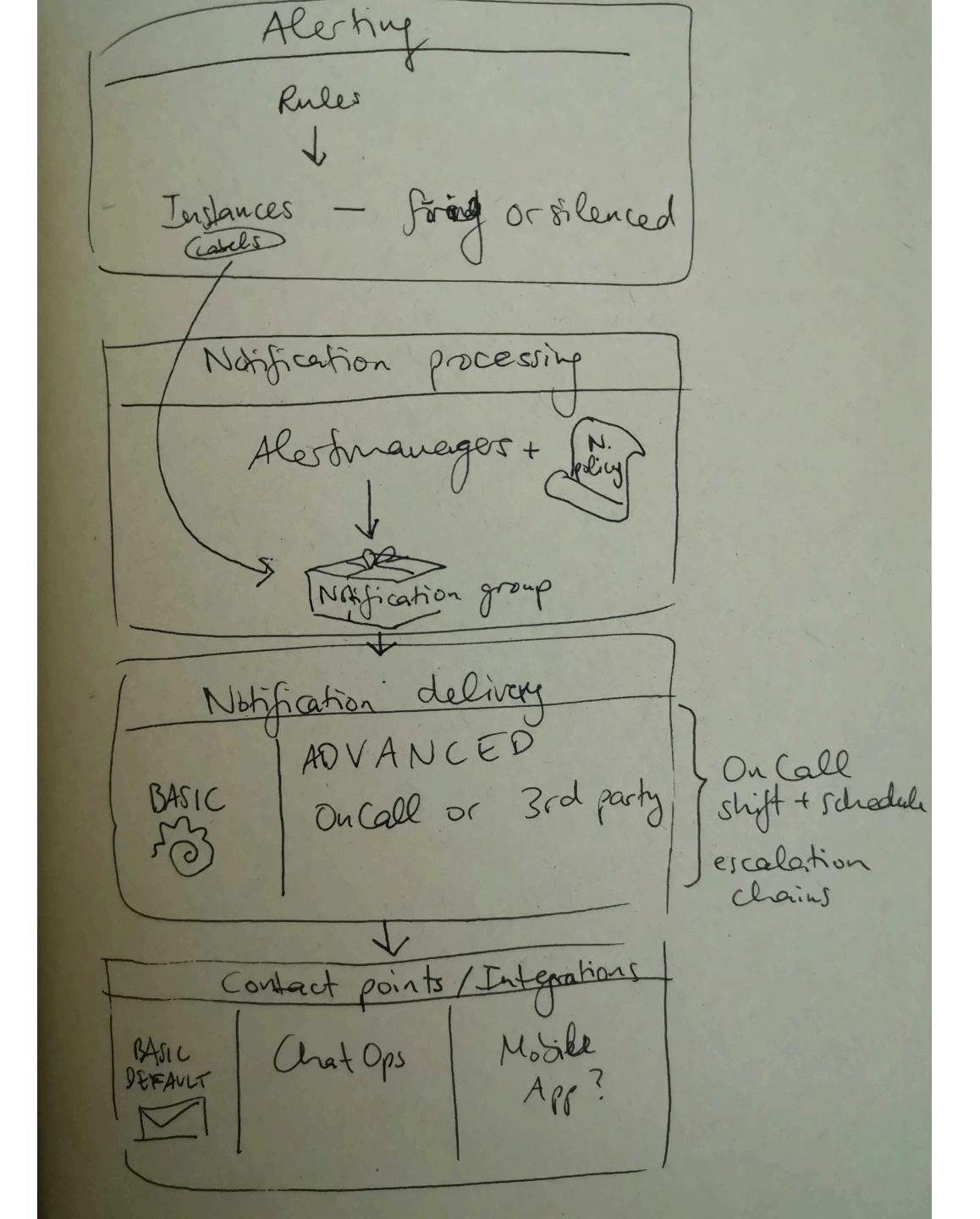
flowchart in Miro



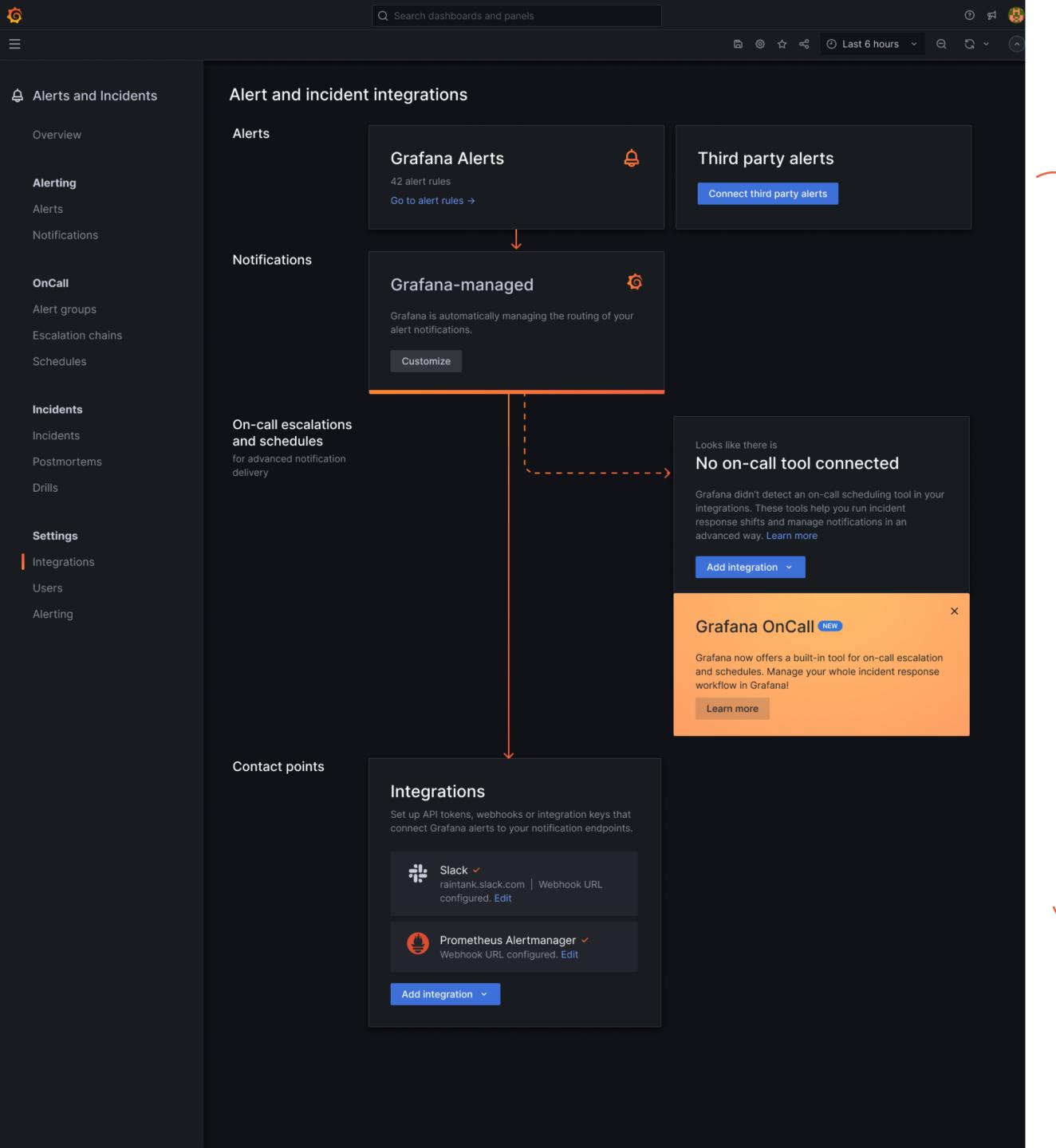
It is hard to understand how each part of the system is connected. Users struggle to understand notifications management between Alerting and OnCall.

#### SOLUTION

flow-based views for integrations and notifications



I tried to arrange the UI by the way alert data flows through the system. There's alerts, notifications which separated into notification processing and notification delivery, and contact points.



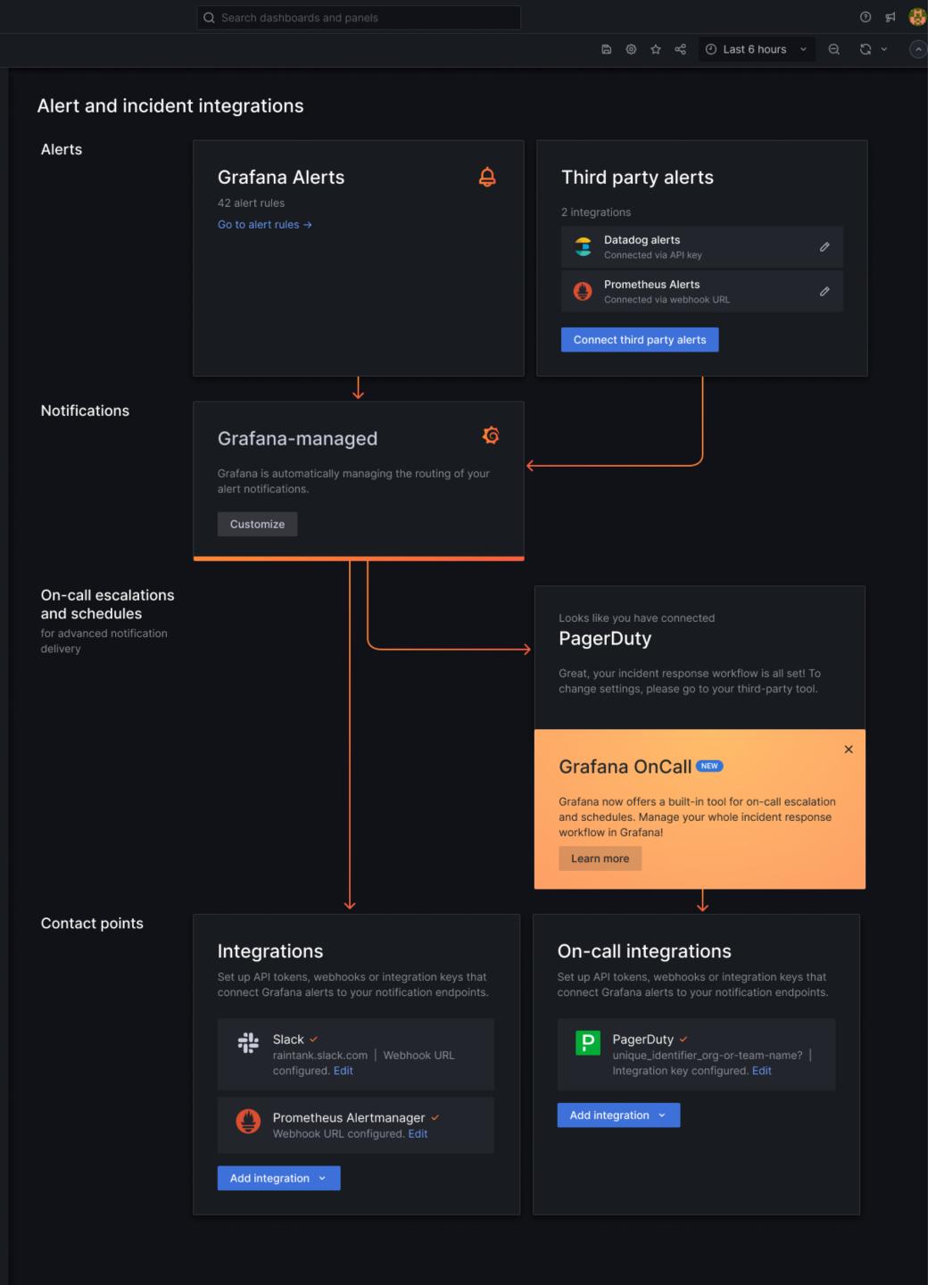


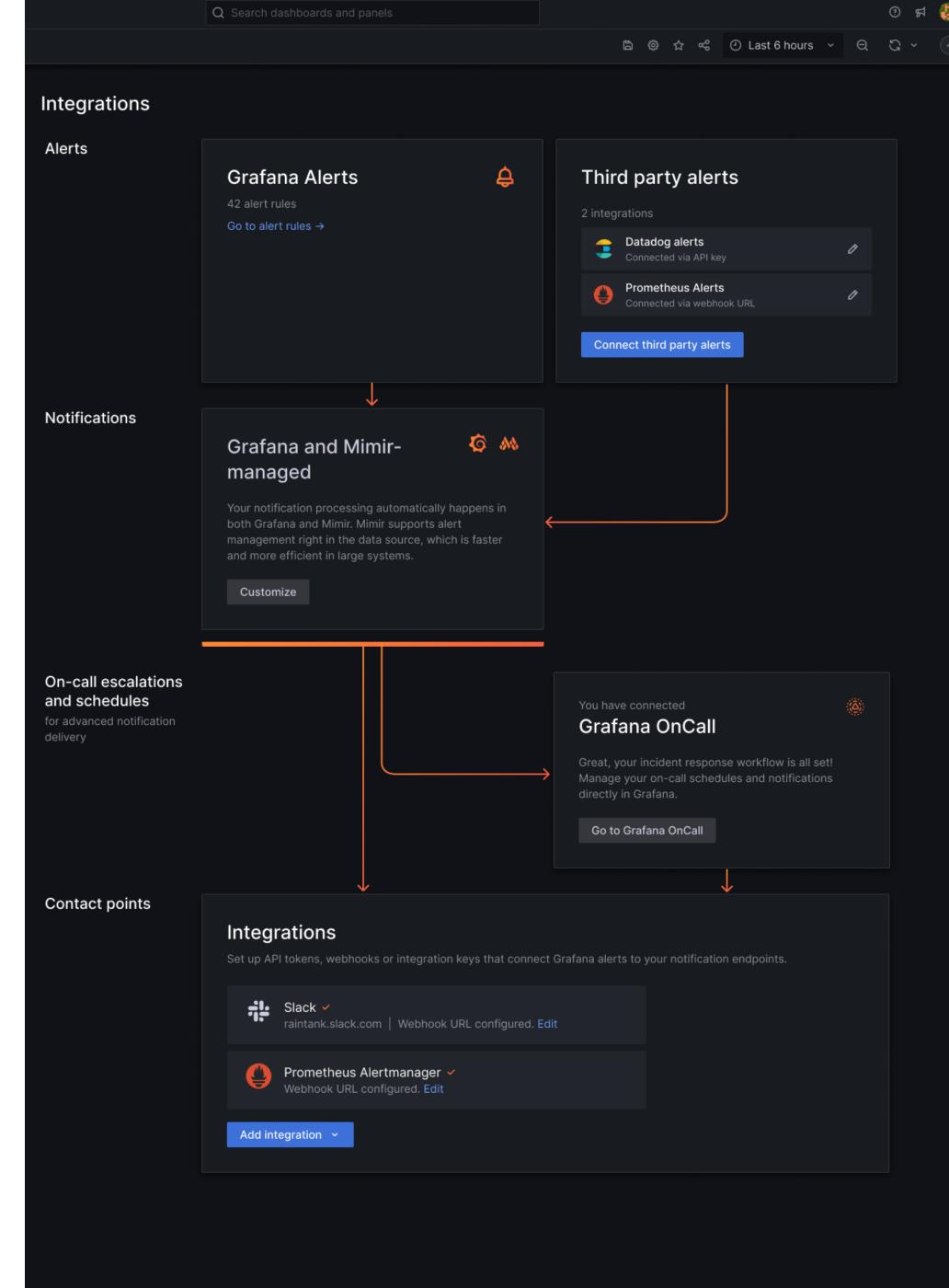
Left column: Grafana, right column: Third party

For integrations, you can either use built-in Grafana tooling or integrate additional things you want to use.



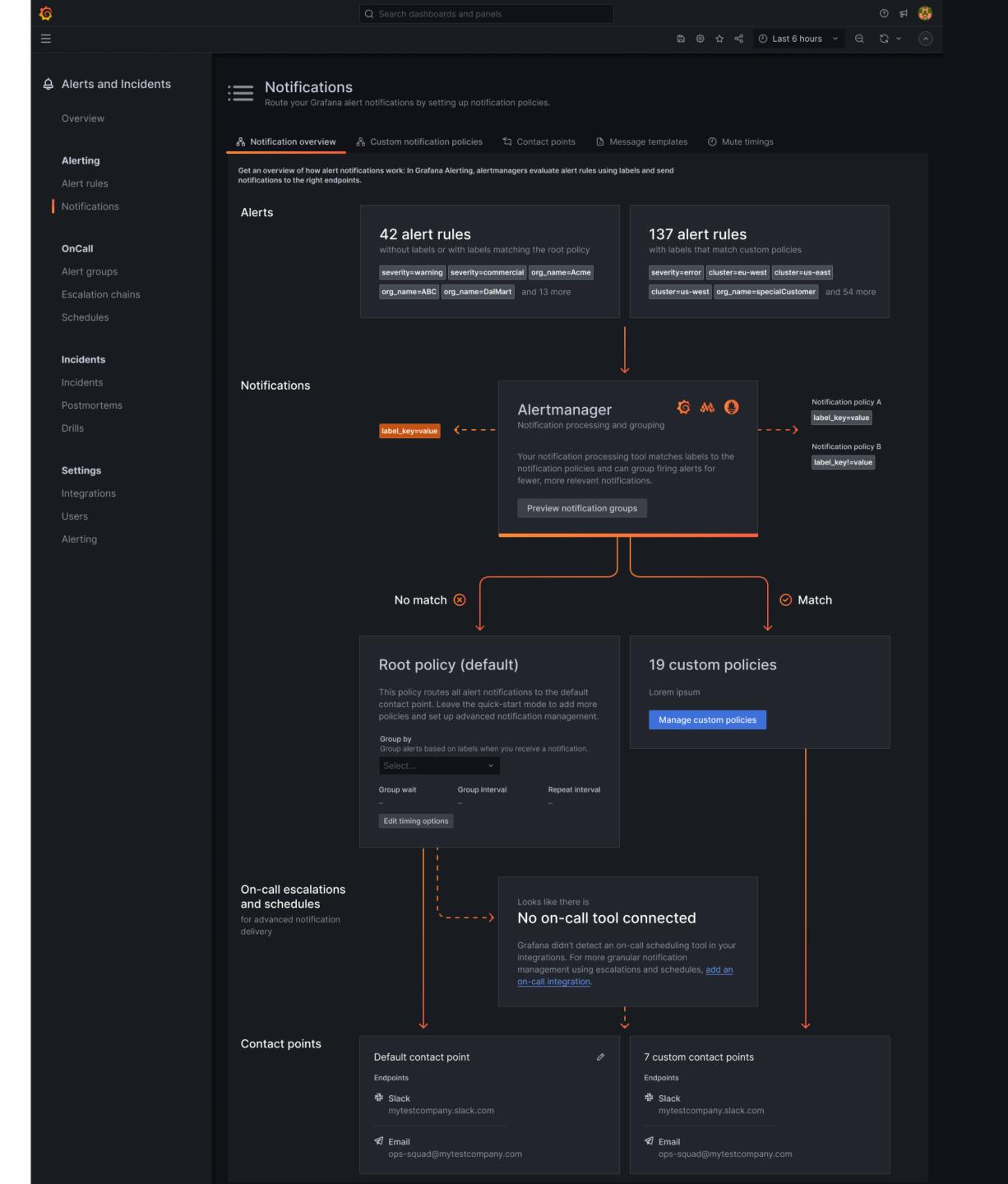
Grafanistas with no background knowledge were still confused and more research and iteration is needed to make sure users understand this





jess designs it

The flow visualization and options change depending on the user's setup and integrations.





I propose to use similar
visualizations on a new
"Notification overview" page.
The complex notification
management area could become
easier to understand with this.



66

I love this! The visualization is

# so much easier to understand

than everything we have right now. It's gonna be really helpful not just for users but even our own people to understand our system.

99

DEVIN CHEEVERS, GROUP PRODUCT MANAGER

#### **PROBLEM**

The complexity presupposes a lot of knowledge and terminology, which can be overwhelming.
Our UIs can be very dense, and could distract users from their key tasks.

#### SOLUTION

simplified interfaces that cater to user jobs and needs

## personas



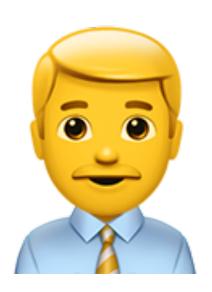
#### THE ENGINEER ON-CALL

- Occasional user of Grafana Ops tools, not the most versed
- Sometimes need to work around the things they don't know in a tool
- Thankful for a good runbook



#### THE ALERT EXPERT

- Has set up and created the alerting system or at least parts of it
- Expert user of Alerting
- Is eager to continually improve the system, but needs the right feedback to know what to change



#### THE LEADERSHIP STAKEHOLDER

- Mostly interested in performance and SLOs
- Might be an engineering manager who helps with scheduling on-call rotations

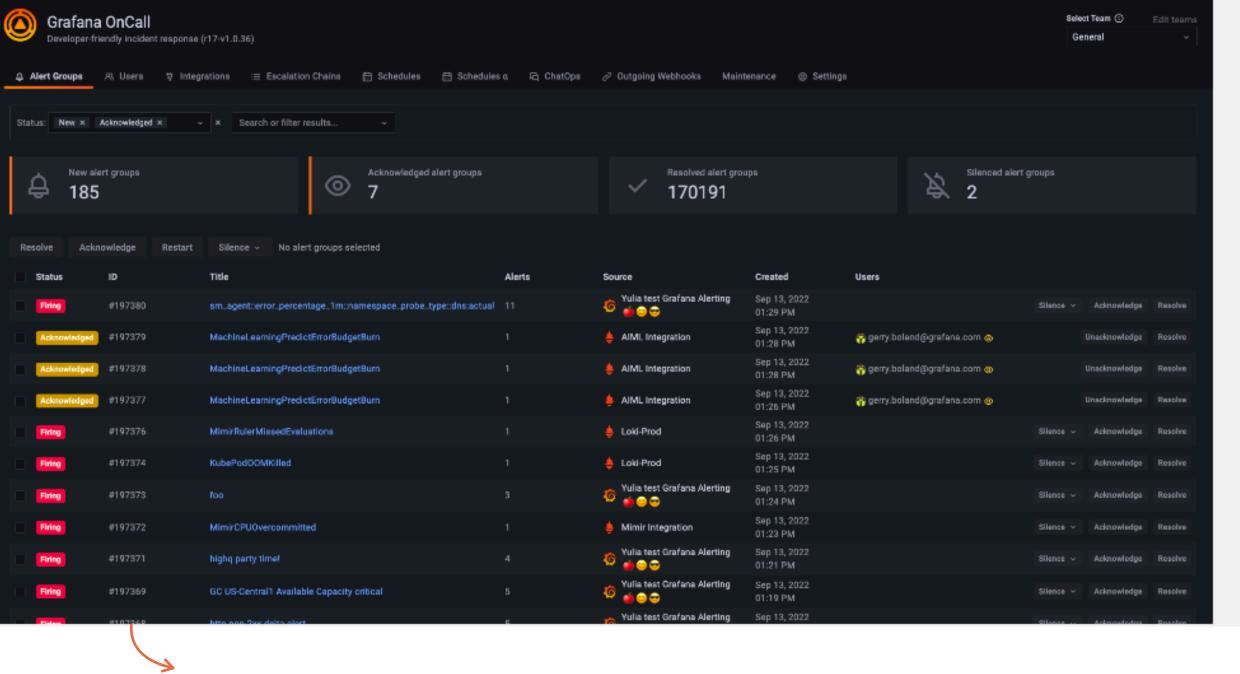




# I have new tech fatigue. If I can avoid it, I don't use the OnCall UI at all, because it's way too hard.

- A GRAFANA ENGINEER WHO IS OCCASIONALLY ON-CALL





USERS ARE TRYING TO AVOID THE UI.
THEY WILL ONLY OPEN GRAFANA OPS TO

**1** 

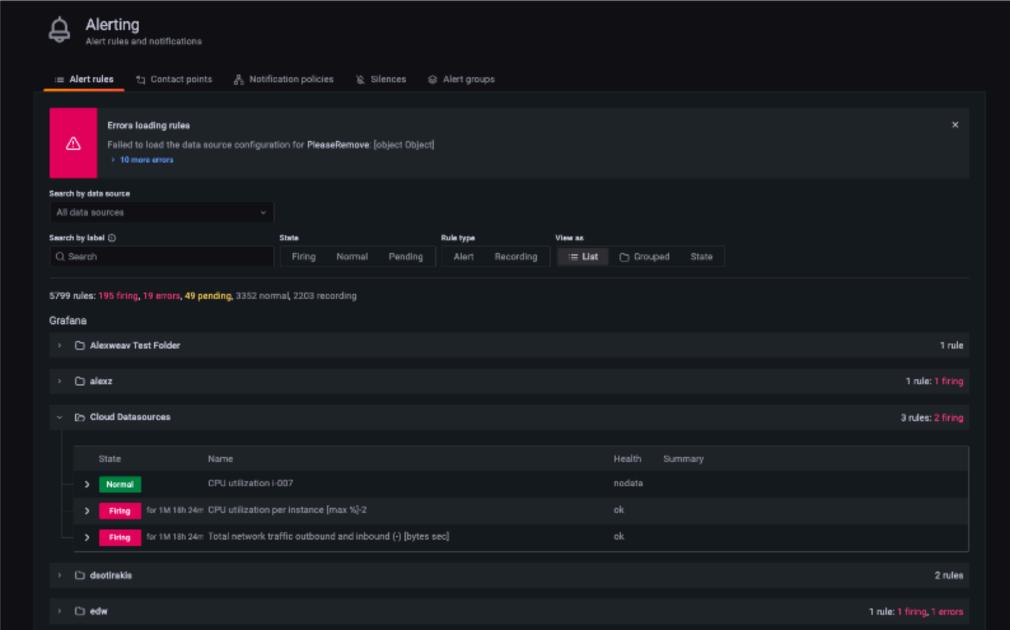
set up the system



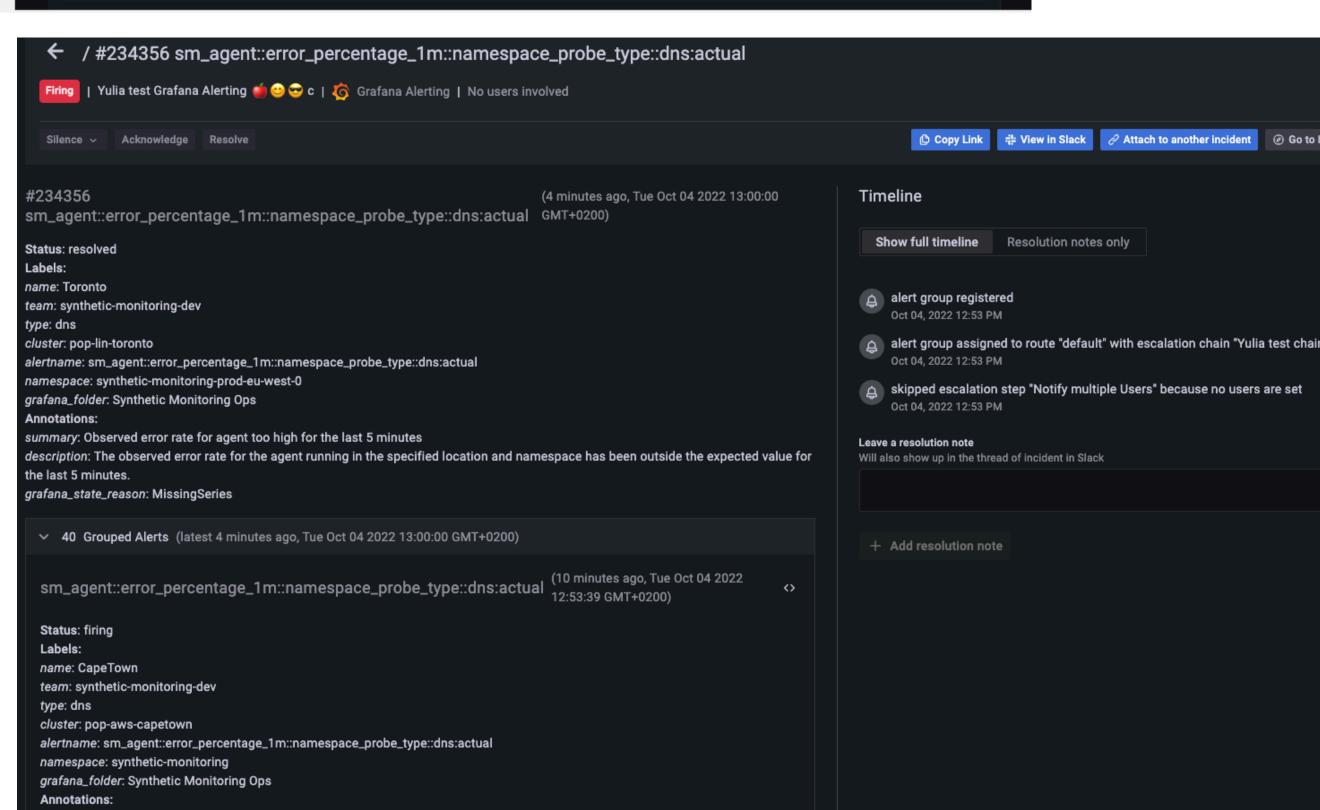
manage and improve existing alert rules

3

investigate alerts and incidents



jess designs it

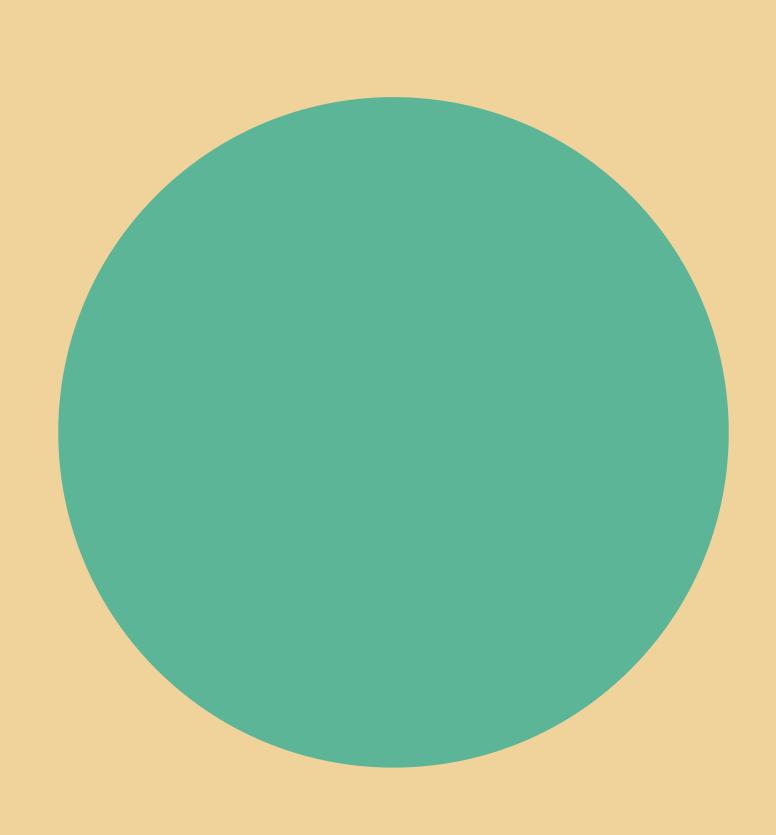




GRAFANA OPS NEEDS TO

## help personas do their jobs better

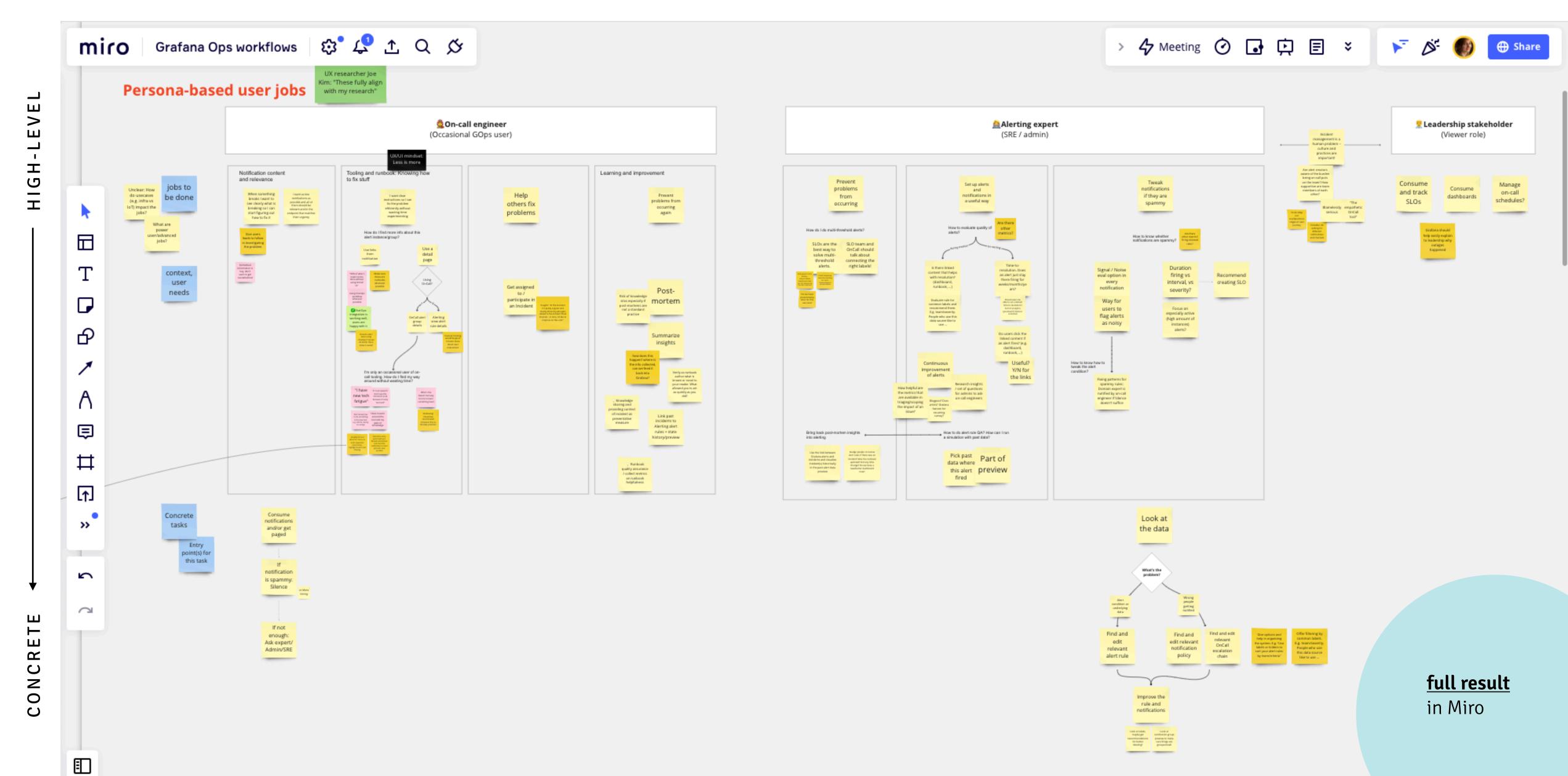
BUT WHAT ARE THEIR JOBS?



#### MAPPING OUT JOBS PER PERSONA



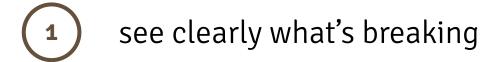


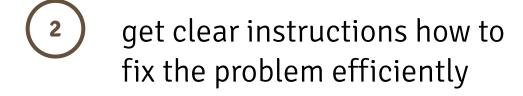




## alert lists and detail pages

#### **USER JOBS**





#### **CURRENT SOLUTION**

- Us can be overwhelming: information overload and not enough highlighting of what's important
- having multiple different list UIs makes it hard and slows users down in learning our tools
- within an OnCall alert group, there is no content clarifying why these alerts are grouped together

- Grafana doesn't nudge users to add instructions for fixing problems
- from the OnCall alert details, there are no links with further actions

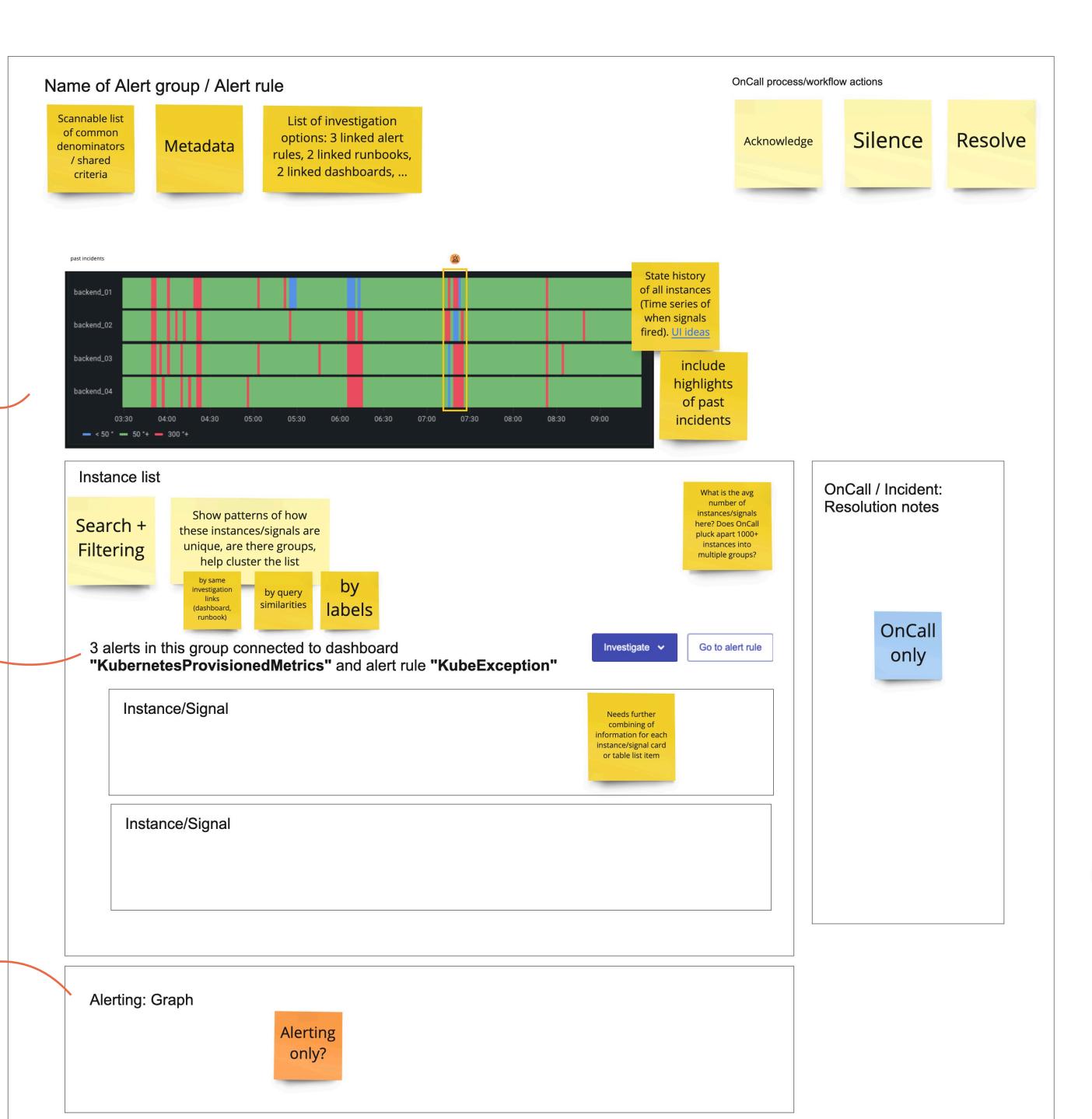
#### IDEA: SHARED TEMPLATE FOR DETAIL PAGES

used both for Alerting rule view and OnCall group detail view

Give more visual information: **State history** of all instances over time as well as **past incidents** 

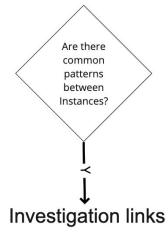
Allow for **investigating multiple instances together**if they have the same
dashboard/runbook/alert rule

Adapt shown content blocks depending on the product



jess designs .it

> wireframe in Miro



Go to alert rule

Go to dashboard

Go to Explore

Go to Runbook "I'd really like to explore how we allows customers to merge incidents, alert groups and alerts depending on what tools they're using from us."

- DEVIN CHEEVERS, GROUP PRODUCT MANAGER



#### IDEA: SHARED TEMPLATE FOR ALERT-RELATED LISTS



jess designs .it

Shown content adapts to both used product and viewer persona through view modes. Same design and components, different actions and content

on-call investigator mode

Focus on state and timings

For investigating firing alerts on-call



== OnCall alert groups

alert rule tweaking mode



Focus on folder and evaluation group



For creating and improving rules



== Alerting UI folder view



### overview

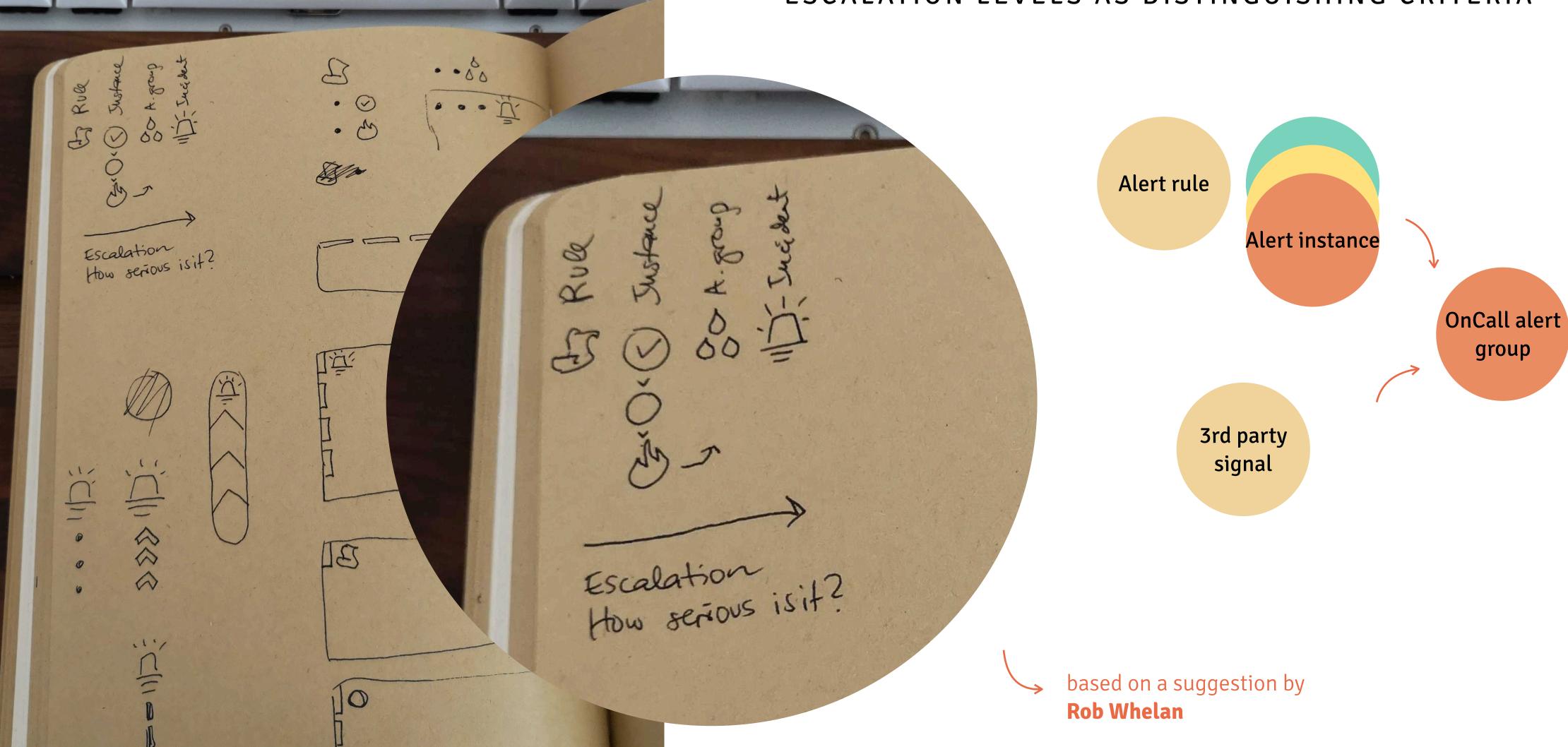
### filters

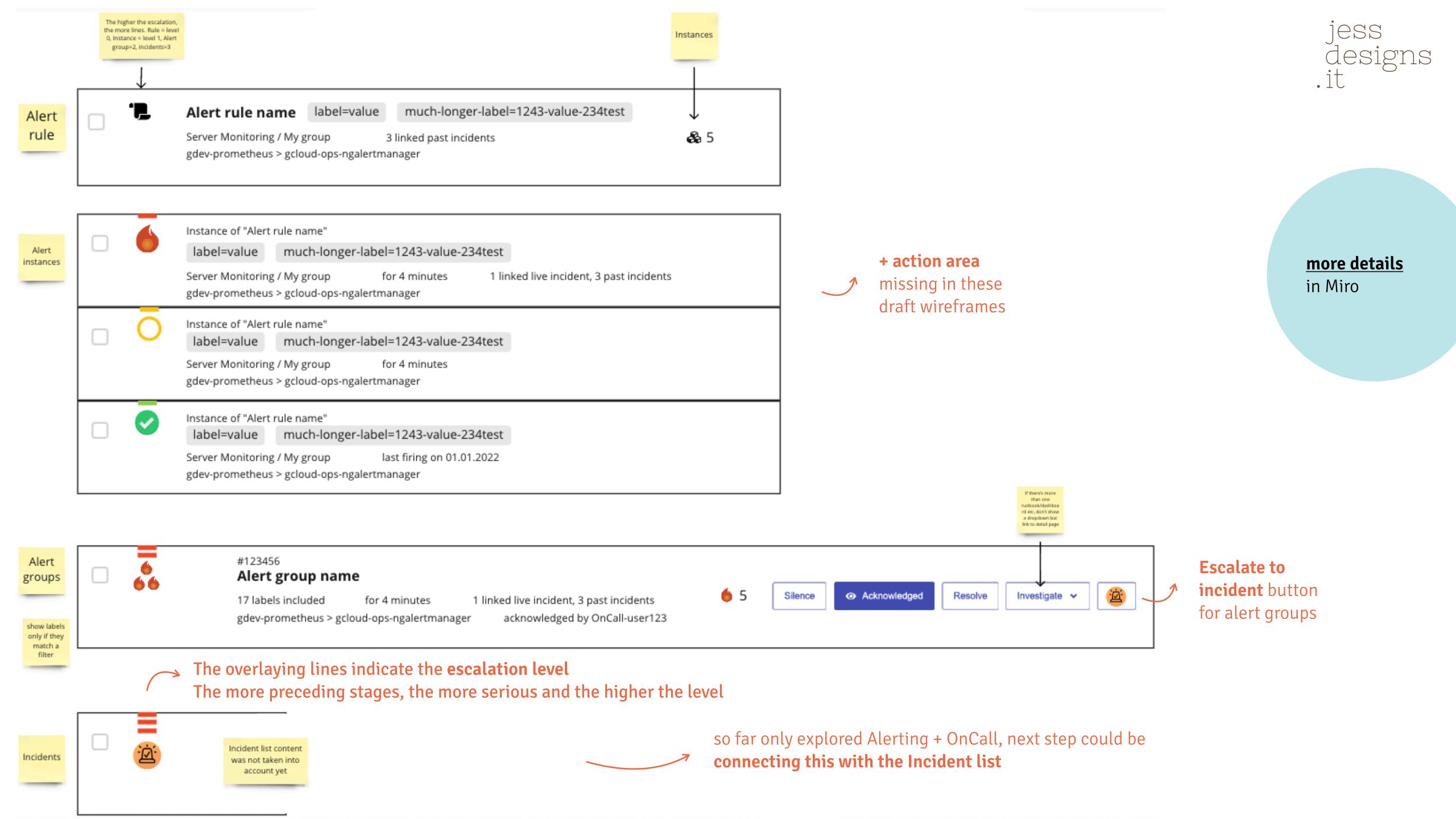
list content			
escalation level indicator	Item name + metadata	Child count (Instances/Signals)	Action area  Investigate

Incident

## list content

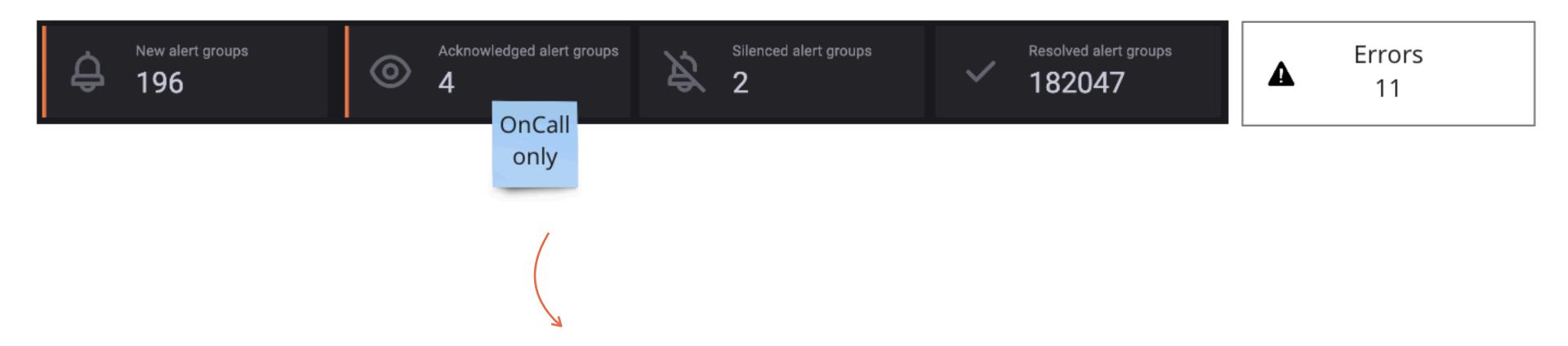
ESCALATION LEVELS AS DISTINGUISHING CRITERIA





## overview

- Use the data cards with filtering capabilities from OnCall
- Allows for a nice way to surface errors together with other summary content



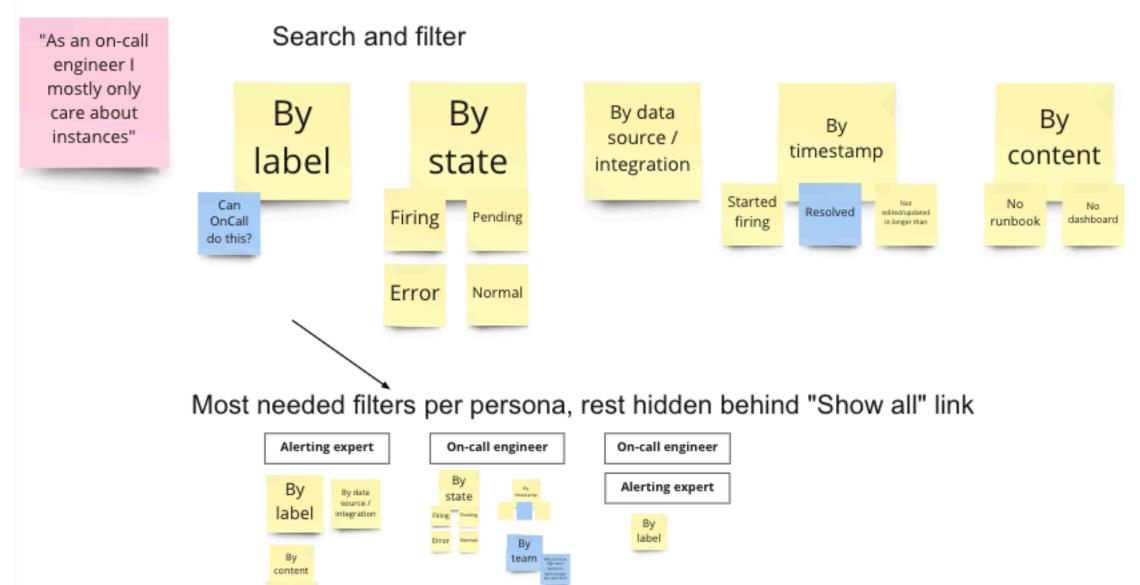
#### ADAPTED OVERVIEW FOR ALERT RULES LIST

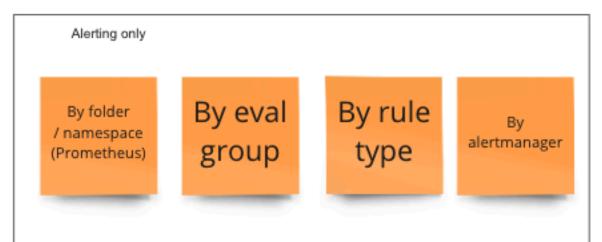


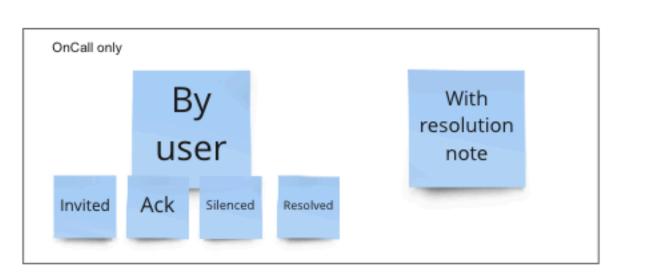
#### jess designs it

## filters

#### WHICH OPTIONS TO SHOW FOR WHICH PRODUCT?





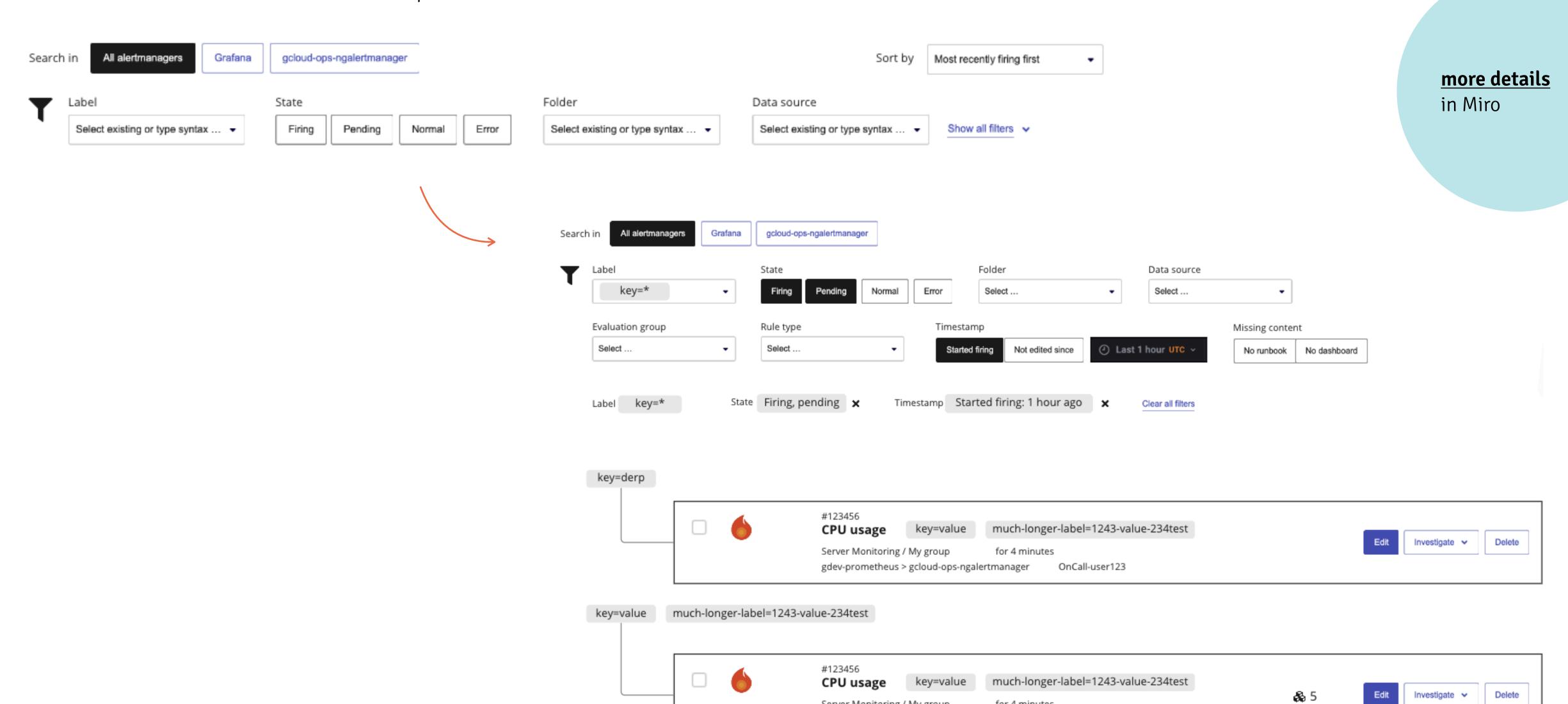






## filters

- show one row of most relevant filters for every mode, with an option to show all
- list all active filters below the actual filter pickers



#### jess designs it

## filters

#### SOME UNRESOLVED QUESTIONS

should we have one text input where you can type in filtering shorthands for quicker usage and less clicking?

How might we show grouping by label across folders/groups /data sources?

How might we introduce filter suggestions to narrow down the search even more? How might we allow users to add criteria to their filtering based on the current results?

ght we introduce gestions to narrow the search even



based on output from a



## other ideas and questions

#### RELATED TO PERSONAS AND JOBS

- auto-link OSS runbooks if available (depends on data source)
- nudge users to add runbook links during alert creation
- introduce consistent actions for both lists and detail pages

#### **PROBLEM**

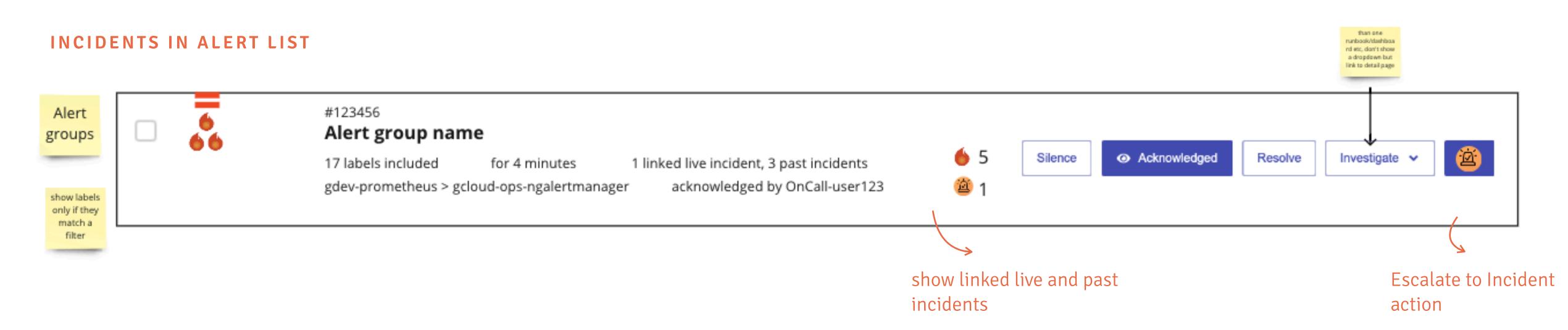
Users expect the Ops products to already be interconnected. When they don't see the options they expect, they ask "Why can't I".

#### SOLUTION

spiderweb connections between products

## surface connections

The list UIs as key interaction point in Grafana Ops have a lot of potential to bring awareness to how alert rules, instances, groups and incidents are based on each other.



#### SHOW INCIDENT HISTORY WITH STATE HISTORY





## to do: audit for connecting actions

We have heard many requests for our products to allow for connecting actions. Some ideas are listed below, but there is probably more. This is a to-do for my successor to explore and identify all the things we could do.



CREATE INCIDENT FROM DASH / WITHOUT ALERT GROUP

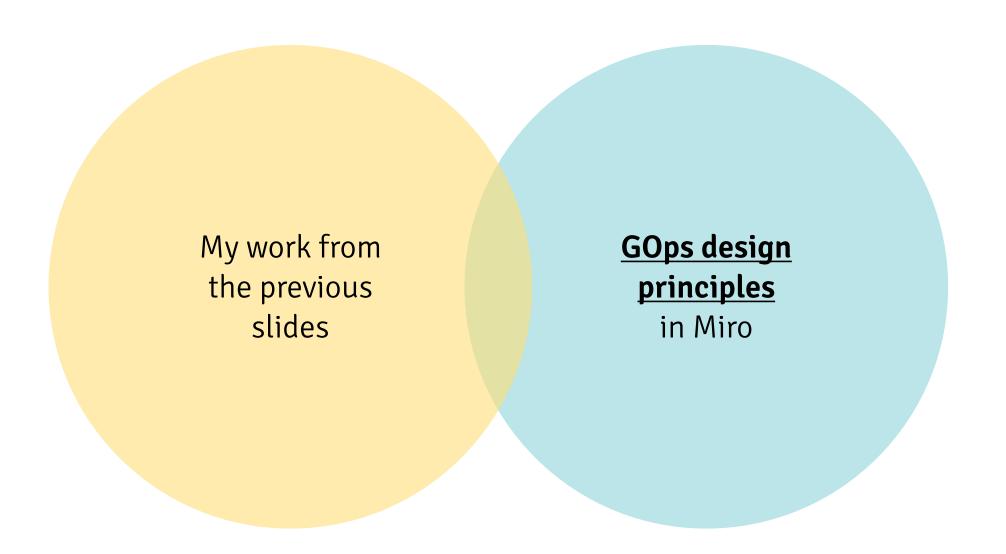
ADD OPTION TO CREATE INCIDENTS IN MESSAGE TEMPLATES

KEEP CONTEXT AND INFORMATION FROM PREVIOUS SOURCES WHEN ESCALATING TO INCIDENT

SLO, ALERT AND RUNBOOK ADJUSTMENTS AS PART OF POST-MORTEMS

???





NEXT STEPS

## design principles check

We have some solution ideas now, but I didn't have time to reevaluate them using our GOps design principles. This still needs to happen!

jess designs it

THE FUTURE

## usability tests

Product-market fit validation is key.

Building solutions that don't solve customer problems is a waste of resources.

Test early and often and save on development costs that don't bring value.



#### PROPOSED STEPS

**4–6 usability tests with real customers**per proposed solution, prioritizing adoption workflows

AND THEN





## provide a knowledge base

My work has uncovered gaps and produced much-needed alignment and aggregation of information.

"Jess actually understands these concepts, just like an engineer!"

- GILLES DE MEY, TECH LEAD ALERTING FRONTEND

"The workflow map will be really useful even for engineers."

- ROB WHELAN, ENGINEERING MANAGER

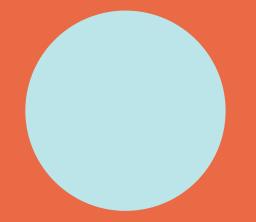


## provide a big design vision

The team focus from the product and engineering side has been tactical. People have talked about things we should be doing and that we need unification, but it was my job in this project to define what that actually means.

"This looks awesome!"

- MARC CHIPOURAS, DIRECTOR OF ENGINEERING GOPS

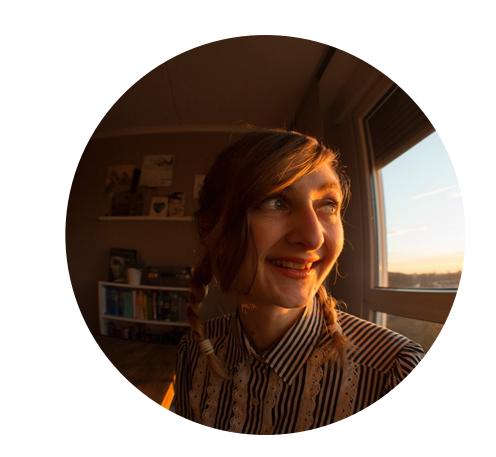


"This is exactly what our teams need to build a product that truly meets our users needs.
Absolutely brilliant!"

- MARY SITZENSTATTER, UX MANAGER



#### THANK YOU! QUESTIONS?



## Jessica Matz hello@jessdesigns.it

Read more about me and find my portfolio at www.jessdesigns.it