

Getting Started

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2. [Add User Properties](#)
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Before installing and configuring the Escalator we recommend you take a few minutes and familiarize yourself with the the below pages to ensure you understand the assorted concepts and requirements.

- [Calendars](#)
- [Glossary](#)
- [Supported Carriers](#)

Step 1 - Install Escalator

Installation Guide



Before You Begin

You must have the *JIRA System Administrators* [global permission](#) before you can execute the instructions on this page

Installation

1. Log in as a user that has the *JIRA System Administrators* global permission
2. Click the **Admin** drop-down and choose **Add-ons**. You will possibly challenged for credentials again and then the **Add-ons** page will load
3. Click **Find new add-ons** from the available list on the left side of the page
4. Search for **Escalator** and the appropriate version will appear in the results
5. Follow the appropriate steps to install the add-on and generate a license

Updates

1. Log in as a user that has the *JIRA System Administrators* global permission
2. Click the **Admin** drop-down and choose **Add-ons**. You will possibly challenged for credentials again and then the **Add-ons** page will load
3. Click **Manage add-ons** from the available list on the left side of the page
4. Locate the **Escalator** add-on and click the **Update** button

Step 2 - Add User Properties

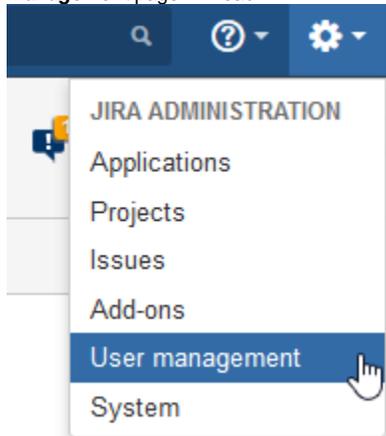
Adding SMS User Properties to JIRA Users



SMS User Properties are required to be configured for each user the Escalator needs to alert.

1. Log in as a user that has the *JIRA System Administrators* global permission

2. Click the **Admin** drop-down and choose **User management**. You may be challenged for credentials again and then the **User management** page will load



3. Find the user you wish to add an SMS number for and click their **name**. You should be taken to a page showing all of their **Account information**

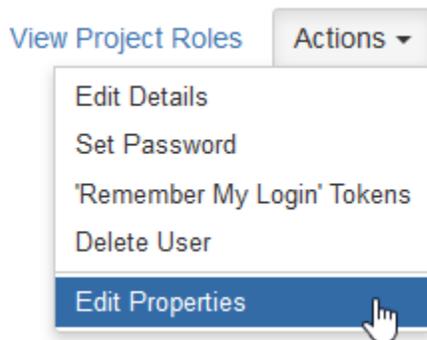
Users

Filter users In group Application access

Displaying users 1 to 1 of 1.

Full name	Username	Login details
test	test test@test.com	Never logged in

4. Click the **Actions** button and then click **Edit Properties**



5. On the **Edit User Properties** page you should see two fields - **Key** and **Value**. Enter the code you are using to identify the SMS property in the **Key** field and the 10 digit number for the user in the **Value** field and then click the **Add** button

Add User Property

(Example: Key = favorite color, Value = blue)

Key

Value

Add



Please note that while the **Key** can be any string of characters it *must* be consistent across *all* users who could possibly be alerted using the Escalator.

Additionally, the **Value** for the **Key** must meet the below conditions depending on your chosen SMS provider:

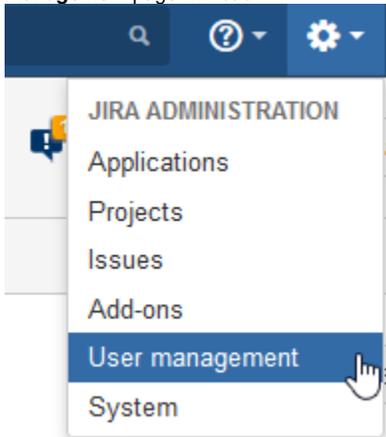
Provider	Availability	Value Length	Special Formatting Requirements
E4SIP	US Numbers Only	10 Digits	
Twilio	US & International Numbers	10+ Digits	Must conform to E.164 formatting - https://support.twilio.com/hc/en-us/articles/223183008-Formatting-International-Phone-Numbers

Adding Slack User Properties to JIRA Users

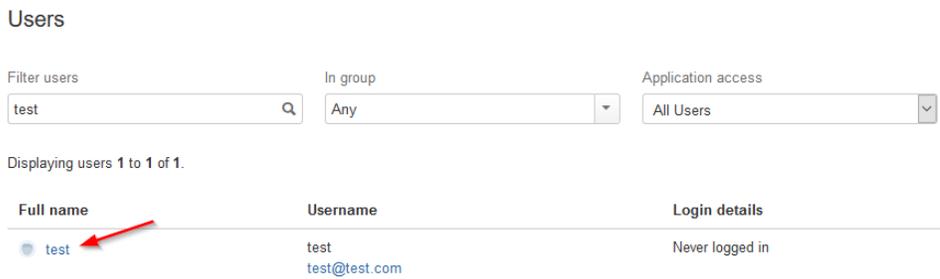


Slack User Properties are required to be configured for each user the Escalator needs to alert via Slack.

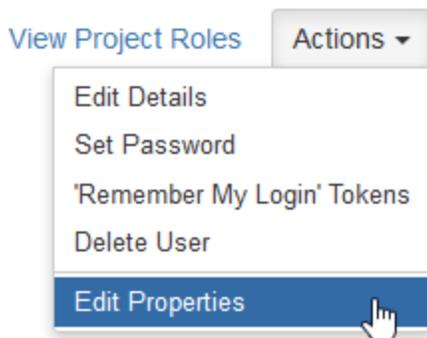
1. Log in as a user that has the **JIRA System Administrators** global permission
2. Click the **Admin** drop-down and choose **User management**. You may be challenged for credentials again and then the **User management** page will load



3. Find the user you wish to add a Slack name for and click their **name**. You should be taken to a page showing all of their **Account information**



4. Click the **Actions** button and then click **Edit Properties**



5. On the **Edit User Properties** page you should see two fields - **Key** and **Value**. Enter the code you are using to identify the Slack property in the **Key** field and the users Slack name in the **Value** field and then click the **Add** button

Add User Property

(Example: Key = favorite color, Value = blue)

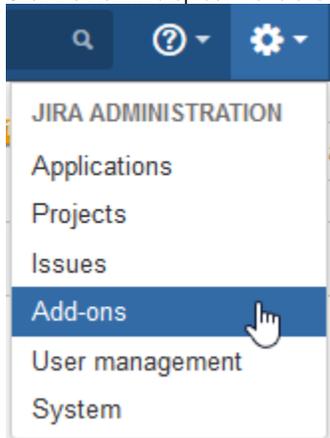
Key	<input type="text" value="slack"/>
Value	<input type="text" value="test"/>
<input type="button" value="Add"/>	

Step 3 - Configure Global Settings

Global Settings

 The Global Settings page is where you define global settings for the Escalator add-on. These settings are required in order for the add-on to operate correctly.

1. Log in as a user that has the **JIRA System Administrators** global permission
2. Click the **Admin** drop-down and choose **Add-ons**. You may be challenged for credentials again and then the **Add-ons** page will load



3. Locate the **Escalator** section and click **Global Settings**

ESCALATOR

Global Settings

Tier Groups

Carriers

4. On the **Global Settings** config page please fill out each field with the appropriate information and then click the **Save** button

Administration Search JIRA admin

- Applications
- Projects
- Issues
- Add-ons**
- User management
- System

ATLASSIAN MARKETPLACE

[Find new add-ons](#)

[Manage add-ons](#)

[OSGi](#)

ESCALATOR

Global Settings

[Tier Groups](#)

[Carriers](#)

Global Settings

User To Query Issues As*

Work Hours Calendar

Notification Users Group

Raygun API Key

*Required

Save

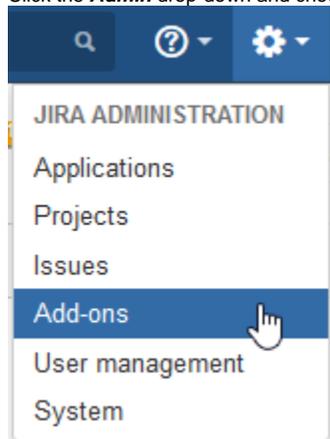
Field	Field Value	Notes
User To Query Issues As	User who has permissions to run the specified JQL	
Work Hours Calendar	URL of the <i>Work Hours Calendar</i>	Used to specify when normal business hours are. Alerts will NOT be sent out during normal business hours. If no Work Hours Calendar is defined Alerts will be sent out at any time of the day or night.
Notification Users Group	JIRA users group to select which users are eligible to receive alerts via the <i>Escalation Schemas</i>	Not required to be used however if your JIRA instance has many non-technical users creating a group that only includes members of your technical team will help quickly narrow down which users are eligible to receive escalations.
Raygun API Key	This field to be left blank unless a key is provided and instructed to be inserted by Computer Technologies, Inc. support personnel	Used only for support purposes

Step 4 - Configure Tier Groups

Tier Groups

i The Tier Groups page is where you define a series of users to be alerted via the Escalator. On this page you define a name for the Tier Group, define the on-call calendar (if you are using one) to query the current on-call user, and establish a listing of users to be alerted at each tier of alerts.

1. Log in as a user that has the **JIRA System Administrators** global permission
2. Click the **Admin** drop-down and choose **Add-ons**. You may be challenged for credentials again and then the **Add-ons** page will load



3. Locate the **Escalator** section and click **Tier Groups**

ESCALATOR

[Global Settings](#)

Tier Groups

[Carriers](#)

4. On the **Tier Groups** config page please fill out each field with the appropriate information and then click the **Save** button

Administration

Search JIRA admin

Applications Projects Issues **Add-ons** User management System

ATLASSIAN MARKETPLACE

Find new add-ons

Manage add-ons

OSGi

ESCALATOR

Global Settings

Tier Groups

Carriers

Tier Groups

Tier Group

Name

On-Call Calendar

Notification Interval

Inherit Tiers

Stop After Last Tier

Tiers

#	User
1	<input type="text" value="admin x"/>

Blank tiers will be automatically removed

Field	Field Value	Notes
Name	Friendly name of the Tier Group	
On-Call Calendar	URL of the on-call calendar	
Notification Interval	JQL runs every 60 seconds, this just controls the interval between notification sends for individual tickets	Measured in minutes
Inherit Tiers	<ul style="list-style-type: none"> • Checked - All users specified in the current and all previous tiers will be alerted to the issue • Un-Checked - Only users specified in the particular tier will be alerted to the issue 	
Stop After Last Tier	<ul style="list-style-type: none"> • Checked - Alerts will stop being sent after one alert is sent to the user(s) defined in the last tier • Un-Checked - Alerts will continue to be sent until the JIRA issue is acknowledged in such a way as to no longer be returned by the JQL query used for the particular Project Escalation 	
Tier 1, Tier 2, Tier 3, etc.	User(s) who should be alerted if the escalation moves to that particular tier	

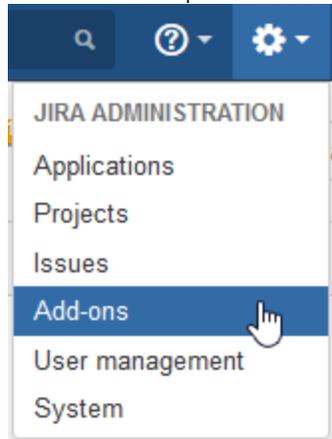
Step 5 - Configure Carrier Settings

Carriers



The Carriers page contains configuration elements for all supported sending methods

1. Log in as a user that has the **JIRA System Administrators** global permission
2. Click the **Admin** drop-down and choose **Add-ons**. You may be challenged for credentials again and then the **Add-ons** page will load



3. Locate the **Escalator** section and click **Carriers**

ESCALATOR

Global Settings

Tier Groups

Carriers

4. On the **Carriers** config page please fill out each field with the appropriate information and then click the **Save** button

Administration

Search JIRA admin

Applications

Projects

Issues

Add-ons

User management

System

ATLASSIAN MARKETPLACE

[Find new add-ons](#)

[Manage add-ons](#)

[OSGi](#)

ESCALATOR

[Global Settings](#)

[Tier Groups](#)

Carriers

Carriers

Enable Twilio

Enable E4

Enable Slack

Enable E-Mail

Save

i To enable a particular carrier you must first check the box next to the carrier name and then fill in all necessary information.

! Note that settings are stored for each carrier regardless of whether or not the carrier is enabled allowing you to configure a particular carrier, disable it for a period of time, and then rapidly enable it again in the future

Twilio

Enable Twilio

Account Sid

oAuth Token

From Number*

Field	Field Value	Notes
Account Sid	Account Sid provided by Twilio and required in order to use third-party integration with Twilio	
oAuth Token	oAuth Token provided by Twilio and required in order to use third-party integration with Twilio	
From Number	Telephone number alerts should be sent from	Usually specified by your carrier/provider. Phone numbers should be entered 10 digits long and be numeric only.

Shared SMS Settings

SMS Settings

SMS User Property Name*

Custom SMS Format

Fields

*See documentation regarding specific formatting requirements for each provider

Field	Field Value	Notes
SMS User Property Name	The property name added to each users profile used to specify the users phone number	We suggest using SMS as the SMS User Property Name however any string of characters can be used so long as it is consistent across all users
Custom SMS Format	User defined text field to allow for customized notifications	
Fields	Used to select JIRA fields to be displayed in the Custom SMS Format	

E4SIP

Enable E4

API Key

From Number*

Field	Field Value	Notes
API Key	API Key provided by E4 SIP and required in order to use third-party integration	
From Number	Telephone number alerts should be sent from	Usually specified by your carrier /provider. Phone numbers should be entered 10 digits long and be numeric only.

Shared SMS Settings

SMS Settings

SMS User Property Name*

Custom SMS Format

Fields

*See documentation regarding specific formatting requirements for each provider

Field	Field Value	Notes
SMS User Property Name	The property name added to each users profile used to specify the users phone number	We suggest using SMS as the SMS User Property Name however any string of characters can be used so long as it is consistent across all users
Custom SMS Format	User defined text field to allow for customized notifications	
Fields	Used to select JIRA fields to be displayed in the Custom SMS Format	

Slack

Enable Slack

Webhook

User Property Name

SLACK

Custom Message Format

Fields

Sending Send direct messages

Send to default channel

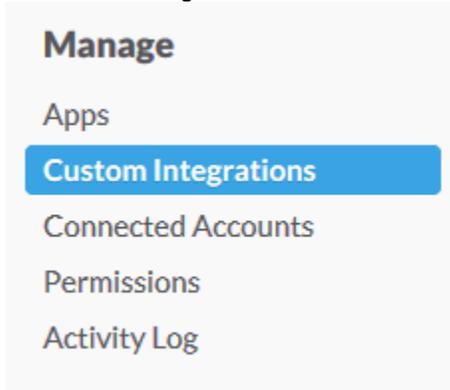
Field	Field Value	Notes
Webhook	Webhook URL provided by Slack	
User Property Name	The property name added to each users profile used to specify the users slack name	We suggest using SLACK as the User Property Name however any string of characters can be used so long as it is consistent across all users
Custom Message Format	User defined text field to allow for customized notifications	
Fields	Used to select JIRA fields to be displayed in the Custom Message Format	
Sending > Send direct messages		
Sending > send to default channel		

Slack Integration

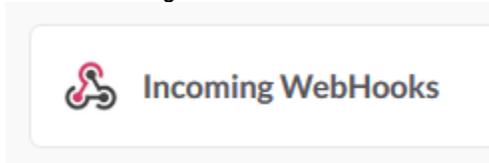
1. In Slack, navigate to **Incoming Webhooks**
 - a. This is accessible by navigating to the URL <https://yourteamnamehere.slack.com/apps>
 - b. Click **Manage**



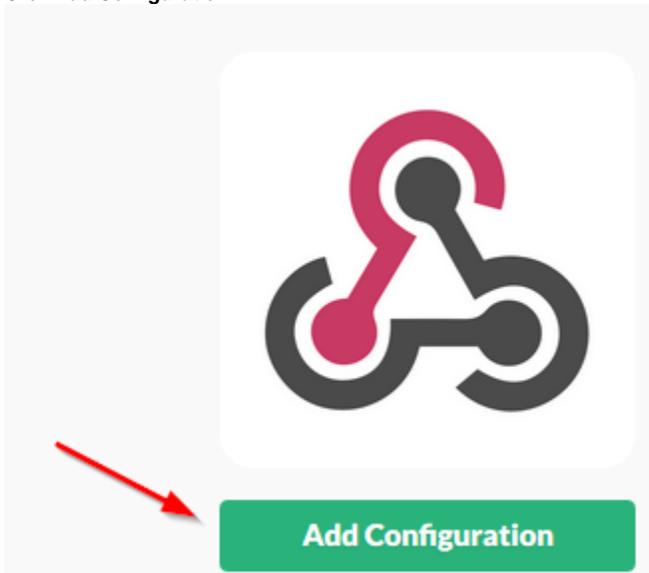
- c. Select **Custom Integrations**



- d. Click the **Incoming WebHooks** button



2. Click **Add Configuration**



3. Select a **Default Channel**

Post to Channel

Start by choosing a channel where your Incoming Webhook will post messages to.

Choose a channel... ▼

[or create a new channel](#)

Add Incoming WebHooks integration

By creating an incoming webhook, you agree to the [Slack API Terms of Service](#).

4. Click the **Add Incoming WebHooks integration** button



5. Scroll down to the bottom of the page until you get to the **Integration Settings** section

6. In the **Customize Name** field type **Escalator**

Customize Name

Choose the username that this integration will post as.

7. In the **Customize Icon** field upload [this](#) image

Customize Icon

Change the icon that is used for messages from this integration.



or

8. Copy the **Webhook URL**

9. In JIRA navigate to **Addons > Manage add-ons** and scroll down to the **Escalator** configuration pages

ESCALATOR

[Escalator Admin](#)

[Escalation Schema Admin](#)

[Notification Schema Admin](#)

10. On the Escalator Admin page configure the following settings:

Slack Settings

Webhook

User Property Name

Custom Message Format

Fields

- Sending Send direct messages
 Send to default channel

Field	Value
Slack Webhook	Paste the URL from step 8 here
Slack User Property Name	slack
Custom Message Format	Add arbitrary text as well as System and Custom fields to allow for customizable notifications

11. We recommend enabling both of the below options by checking their respective boxes

- a. Send direct messages
- b. Send to default channel

Once the above is complete you then need to add a property to each JIRA user to link their JIRA user to their Slack name by following the steps on the [Adding Slack User Properties to JIRA Users](#) guide.

E-Mail

Enable E-Mail

Server Host

Server User

Server Password

Server Port

Use SSL

From Address

Custom Subject Format Fields

Custom Message Format Fields

Save

Field	Field Value	Notes
Server Host	Name or address of your E-Mail server	
Server User	Username for your E-Mail server	If required by your E-Mail server
Server Password	Password for your E-Mail server	If required by your E-Mail server
Server Port	SMTP port for your E-Mail server	Defaults to port 25 if nothing is specified
Use SSL	Check if SSL is required to connect to your E-Mail server	
From Address	From address you want used for outgoing E-Mails	
Custom Subject Format	User defined text field to allow for customized notification subject	
Custom Subject Format > Fields	Used to select JIRA fields to be displayed in the Custom Subject Format	
Custom Message Format	User defined text field to allow for customized notification message body	
Custom Message Format > Fields	Used to select JIRA fields to be displayed in the Custom Message Format	

Step 6 - Configure Project-Specific Settings

Project Admin



As the JQL is defined within each unique JIRA project the Escalator for JIRA automatically adds the project key to the end of every JQL query defined.

Additionally, ORDER BY is not supported in JQL statements used for the Escalator. Including an ORDER BY within your JQL may cause unforeseen issues.

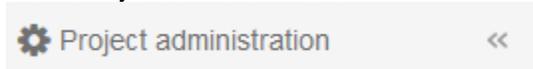
1. Log in as a user that has the **JIRA System Administrators** global permission
2. Click the **Projects** drop-down and choose the appropriate project.



CURRENT PROJECT



3. Click the **Project administration** button



4. Click the Escalator Project Admin button in the lower left corner of the screen

Escalator Project Admin

5. On the **Escalator Project Admin** config page please fill out each field with the appropriate information and then click the **Save** button

Adding Notification Groups to a Project

Project settings

Summary

Details

Re-index project

Delete project

Issue types

- Sub-task
- Task

Workflows

Escalator Project Admin

Tier Group ▼

JQL

Fallback User ▼

NWH Only ?

Add

Tier Group	JQL	Fallback User	NWH Only	Actions
TEST	Resolution = Unresolved	admin	No	Delete Edit
TEST BETA	Resolution = Unresolved AND CustomField = "False"	admin	Yes	Delete Edit

Field	Field Value	Notes
Tier Group	Select the Tier Group you wish to receive notifications	
JQL	Define the JQL you wish to use to determine which issues will trigger alerts	
Fallback User	User to be notified should the <i>Notification Group</i> fail for any reason	
Non-Work Hours Only (NWH Only)	Restrict the JQL for a particular Notification Group to only those tickets created outside of the business hours defined within the Work Hours calendar	

Editing Notification Groups within a Project

Edit Project Tier Group



Tier Group* TEST

JQL* Resolution = Unresolved

Fallback User admin

NWH Only ?

Save

Close

1. Click the Edit button next to the Notification Group you wish to edit
2. Make the necessary changes
3. Click Save