Safety Connection User Guide

Everbridge Suite

December 2024

Everbridge Suite
2024
Printed in the USA

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Everbridge software is covered by US Patent Nos. 6,937,147; 7,148,795; 7,567,262; 7,623,027; 7,664,233; 7,895,263; 8,068,020; 8,149,995; 8,175,224; 8,280,012; 8,417,553; 8,660,240; 8,880,583; 9,391,855. Other patents pending.

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Safety Connection Overview

Everbridge Safety Connection allows an Organization to notify its contacts based on their **Last Known Location** in case of a location-based emergency.

The Last Known Location can be updated based on information from Badging and Access Control systems, Network Access (Wi-Fi), and Room Reservation tools. This enables decision-makers to simultaneously monitor events and communicate efficiently to designated recipients using insight gathered from multiple sources.

Using Everbridge-defined templates, administrators upload two types of CSV (Comma-Separated Values) files:

- **Buildings** - Administrators upload the templates from **Settings** > **Map** > **Manage Buildings.**
- **Last Known Locations** - Administrators upload the templates from **Contacts** > **Upload Dynamic Locations**.

Designated operators can see the contacts' buildings and last known locations on the Universe map. Users can draw a polygon around contacts who were last known to be an in affected area, or draw a polygon around contacts who are expected to be in an affected area, and notify them of emergencies.

Buildings

Organizations upload an Everbridge-defined list of the locations that are important to them.

> **NOTE:** You can upload the Domestic and International Airport locations via the Building upload.

See Managing Buildings for more details.

Last Known Locations

There are two options to update the Last Known Location on Contact profiles:

- **Upload -** Organizations can upload an Everbridge-defined template every 5-10 minutes to Everbridge via Secure FTP upload, independent of the Contact upload. This upload updates the Last Known Locations of contacts.
- **/dynamicLocations API** - Organizations can use the /dynamicLocations API to update the Last Known Locations of contacts.

See Uploading Last Known Locations for more details.

Managing Buildings

You can create and manage a list of Buildings important to your Organization from **Settings** > **Map** > **Manage Buildings**. These locations typically contain Assets, such as people or sensitive equipment. For example, you may have employees working in a series of Buildings that you want to be able to communicate with at the same time.

The **Manage Buildings** section is split into two pages:

- **Buildings** - Individual Buildings can be viewed and updated from **Manage Buildings** > **Buildings**.
- **Uploads** - Buildings can be uploaded from **Manage Buildings** > **Buildings** by downloading the provided template, filling it out, and then uploading it from this page.

> **NOTE:** The **Manage Buildings** section is only available for customers who *have not* migrated their Safety Connection Buildings to Asset Management. Those who have migrated their Buildings can upload and manage them from **Contacts+Assets** > **Assets** > **Asset List**.

After you have added your Buildings, you can see them as icons on the Universe map. See Finding Contacts on the Map.

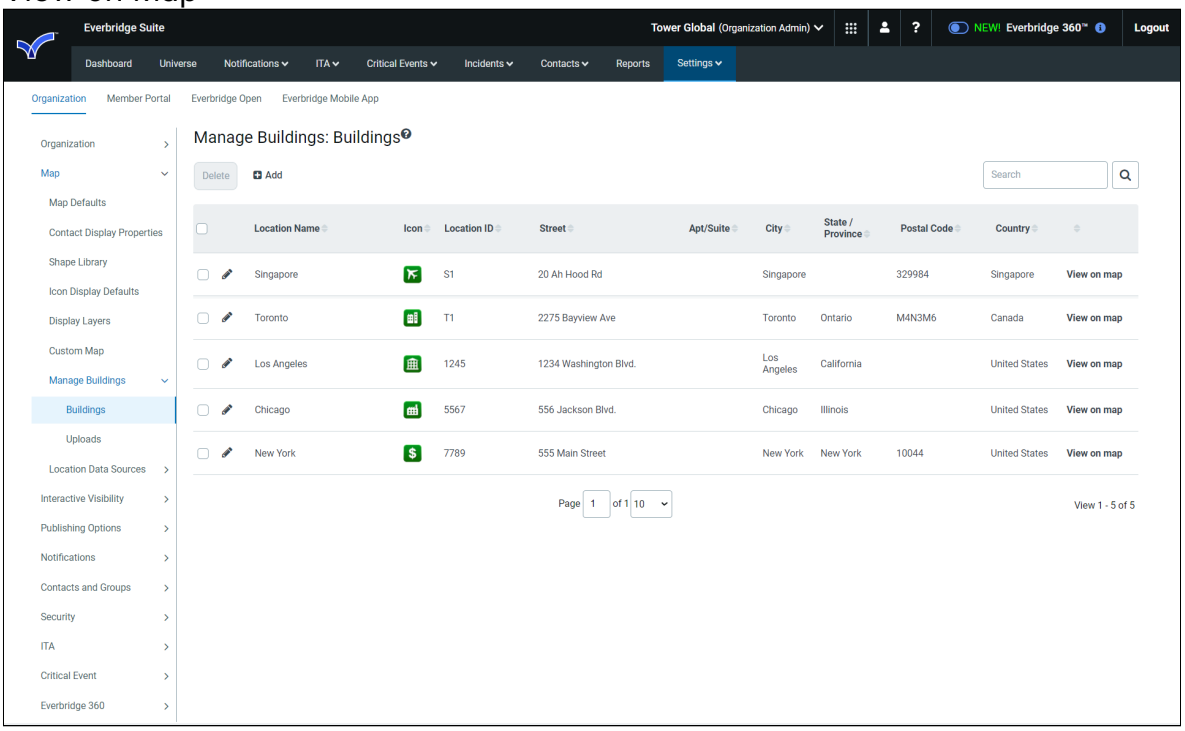
Buildings

To leverage this feature, you must upload a master list of Assets. Your master list of Buildings can contain any number of address records.

Your Buildings are displayed on the **Manage Buildings** > **Buildings** page. The application displays the following information for each Building:

- Location Name (as submitted by the user)
- Icon
- Location ID (as submitted by the user)
- Street
- Apt/Suite
- City
- State/Province
- Postal Code
- Country

- View on Map



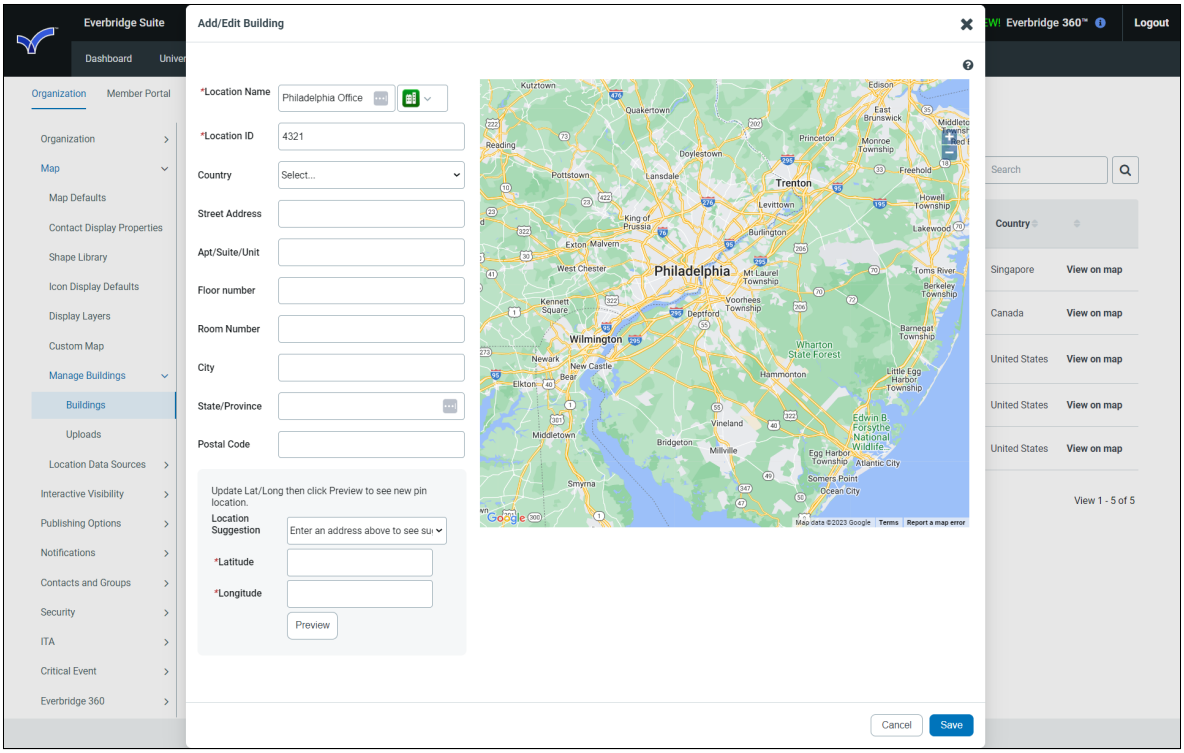
You can perform the following tasks on this page:

- View your current master list of Buildings
- Delete a Building or selection of Buildings
- Add a Building
- View the address location on the map using the geo-point in the record
- Search for an asset record or group of asset records

Add a Building

To add a Building:

1. Select **Add**. The **Add/Edit Building** dialog is displayed.



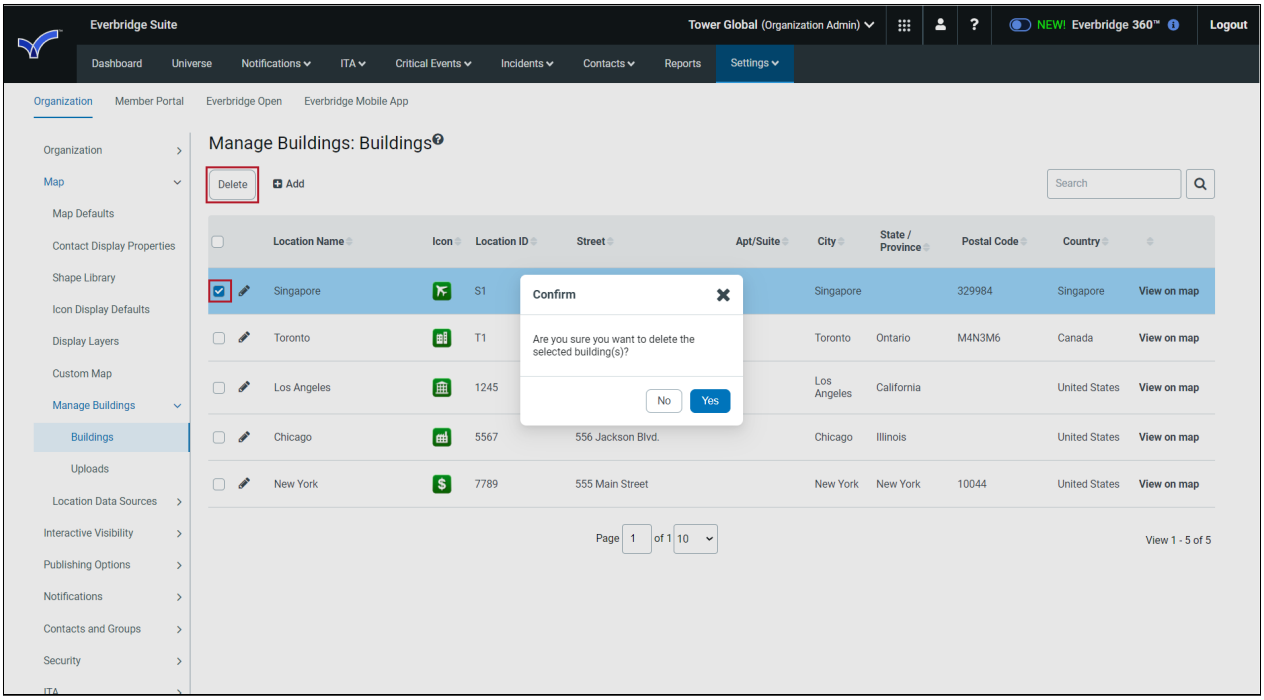
2. Fill in the fields and click **Save** when done. The new Building will appear in the list view.

Delete Buildings

You can delete Buildings from your Organization's master list. However, Everbridge recommends also removing the desired records from your system of record to ensure your next upload does not overwrite your changes.

To delete a Building:

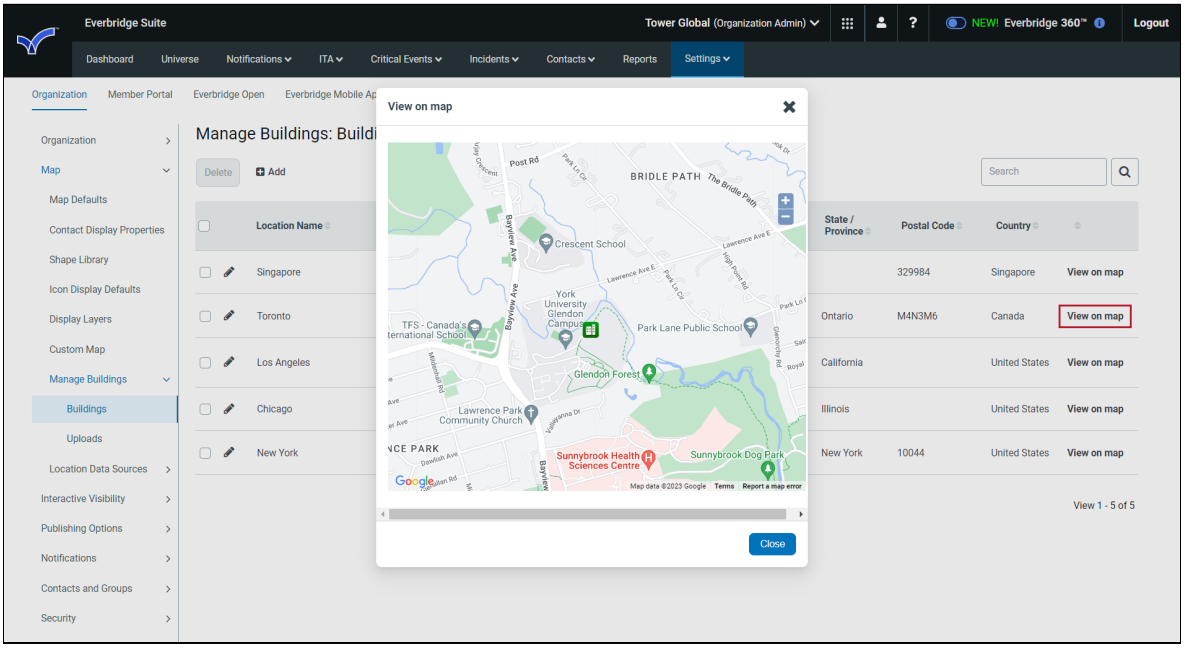
1. Select the checkbox for the applicable Building.
2. Click **Delete**.
3. Click **Yes** to confirm the request to delete the record(s).



View Address Location on Map

To view an address location on the Map:

1. Locate the desired Building, then select **View on map**. The Map View displays the location.

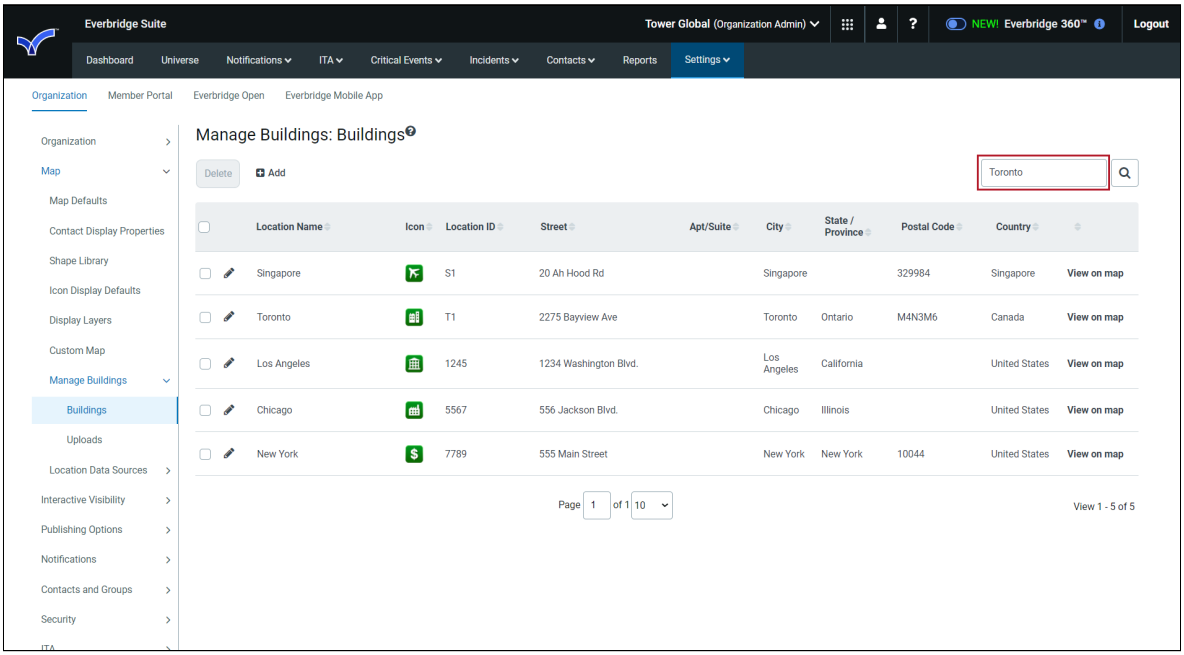


2. Click **Close** when you're done.

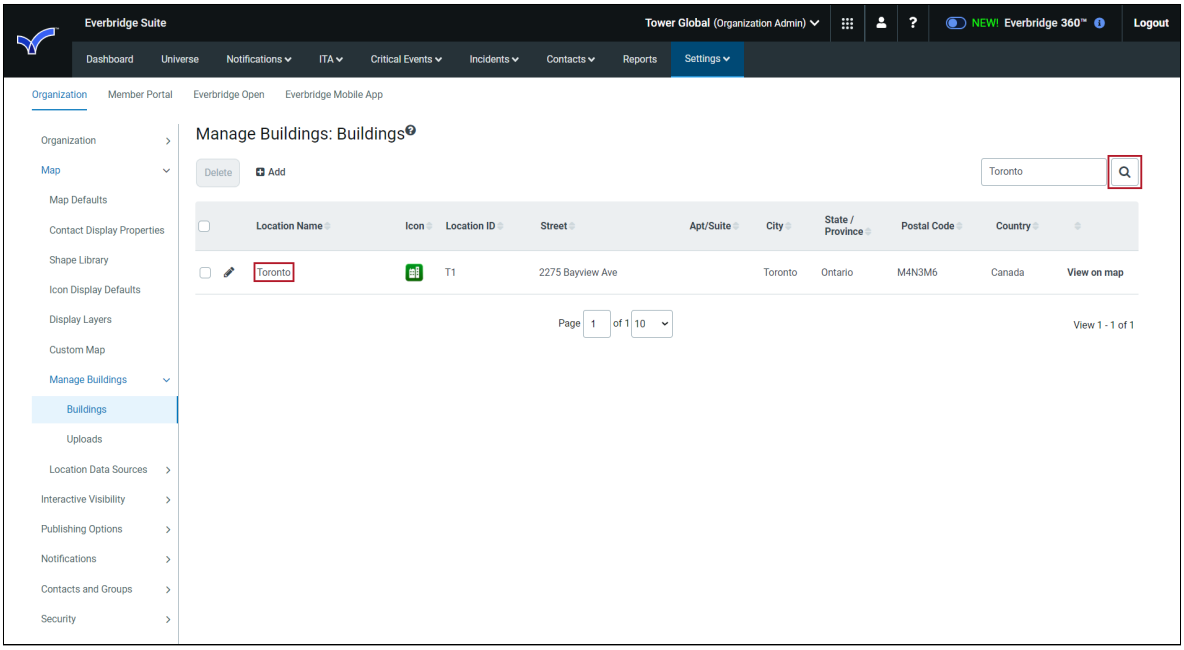
Using the Quick Search Field

To search for a Building using the quick search field:

1. Enter the desired search string in the **Search** field. You can search by any of the following:
   - Location Name
   - Location ID



2. Click the **Search** icon. The application will search the Location Name or Location ID fields for Building asset records that contain the search string in any of those fields.



Uploads

You can upload your master list of Buildings by means of a CSV file. You can download the template from the **Settings** > **Map** > **Manage Buildings** > **Uploads** page that contains the required column headers for your file.

Asset Data Elements

The following table provides details about the column headings, from left to right, in the Asset-Template.csv file. The column headings must not be changed! If you use your own spreadsheet, then ensure your column headings use the exact case-sensitive spelling and spaces.

This feature is designed to enable you to achieve the level of precision you need for your Notifications. The Everbridge application will not verify the address records that you submit are actual address locations. Since you define the Latitude and Longitude for an address, you can determine the precision of the geo-point and the actual location of the geo-point.

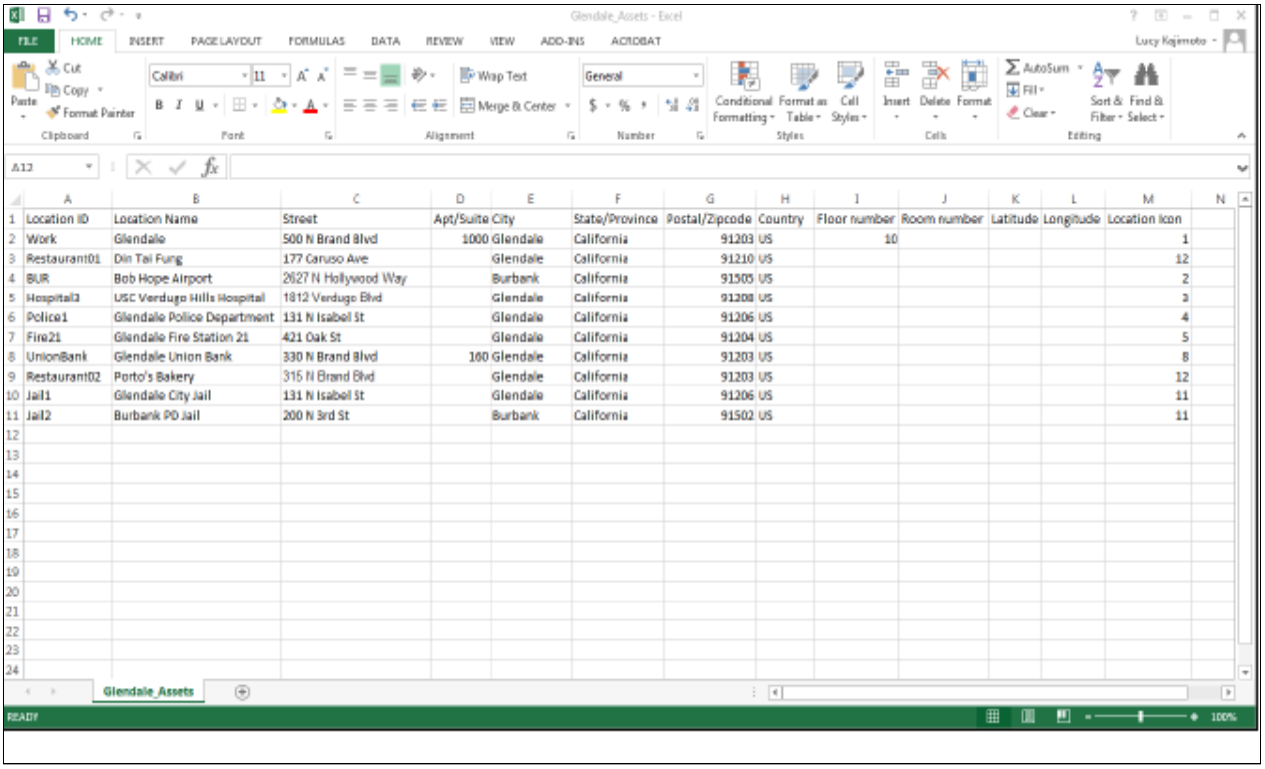
Field	Required	Comments
Location ID	Yes	Client-defined unique identifier for the location record. Maximum Length: 50 Data Type: String Cell cannot be empty

		Value must be unique in file NOTE: If two records have the same Location ID, both records are uploaded without error, but only the latest record is inserted in the Building list if the upload batch records are less than or equal to 1000.
Location Name	Yes	Client-defined unique identifier for the location. Maximum Length: 120 Data Type: String Cell cannot be empty
Street	No (If Latitude/Longitude are provided) NOTE: You can provide either a full address and the latitude/longitude is automatically geo-coded, or you can provide the latitude/longitude.	Maximum Length: 100 Data Type: String
Apt/Suite	No	Apartment or Suite (or Unit) Maximum Length: 75 Data Type: String
City	No	City name Maximum Length: 40 Data Type: String For US addresses, jurisdiction name below county level
State/Province	No	Administrative level below the county level Maximum Length: 40 Data Type: String For US addresses, Everbridge recommends full State name, e.g., “California”

Postal/ZIP Code	No (If Latitude/Longitude are provided) NOTE: You can provide either a full address and the latitude/longitude is automatically geo-coded, or you can provide the latitude/longitude.	If Country = “United States”, then: Minimum Length: 5 digits Maximum Length: 9 digits plus a hyphen Data Type: String Formats: 99999 or 99999-9999 or 999999999 if Country is “United States”
Country	No (If Latitude/Longitude are provided) NOTE: You can provide either a full address and the latitude/longitude is automatically geo-coded, or you can provide the latitude/longitude.	Full ISO country name Maximum Length: 40 Data Type: String Country name is in the ISO country list
Floor number	No	Floor number Maximum Length:20 Data Type: String
Room number	No	Room number Maximum Length: 20 Data Type: String
Latitude	No (If Address fields are provided NOTE: You can provide either a full address and the latitude/longitude is automatically geo-coded, or you can provide the latitude/longitude.	Latitude value Data Type: Precision Not validated for client jurisdiction Only Decimal Degrees (DD) are supported Minimum Value: -90.0000000000 Maximum Value: 90.0000000000 Recommend Spherical Mercator projection
Longitude	No (Address fields are provided) NOTE: You can provide either a full address and	Longitude value, including negative sign Data Type: Precision

	the latitude/longitude is automatically geo-coded, or you can provide the latitude/longitude.	Only Decimal Degrees (DD) are supported Not validated for client jurisdiction Minimum Value: -180.0000000000 Maximum Value: 180.0000000000 Recommend Spherical Mercator projection
Location Icon	No 	NOTE: If you do not enter a Location icon number, or you enter an invalid value, Location icon 1, Office, is used. The following types of Building locations are, from top to bottom, correspond with the icons to the left. 1. Office 2. Airport 3. Hospital 4. Police/Sheriff Station 5. Fire Station 6. Power Plant 7. Your location of Interest (generic) 8. Bank 9. Data Center 10. Manufacturing Plant 11. Prison/Jail 12. Retail Store/Restaurant 13. Meeting Room

The following is an example CSV file, using the “asset-template.csv” and renaming the filename to “Glendale_Assets.csv”. It contains 10 Buildings (in lines 2-11).



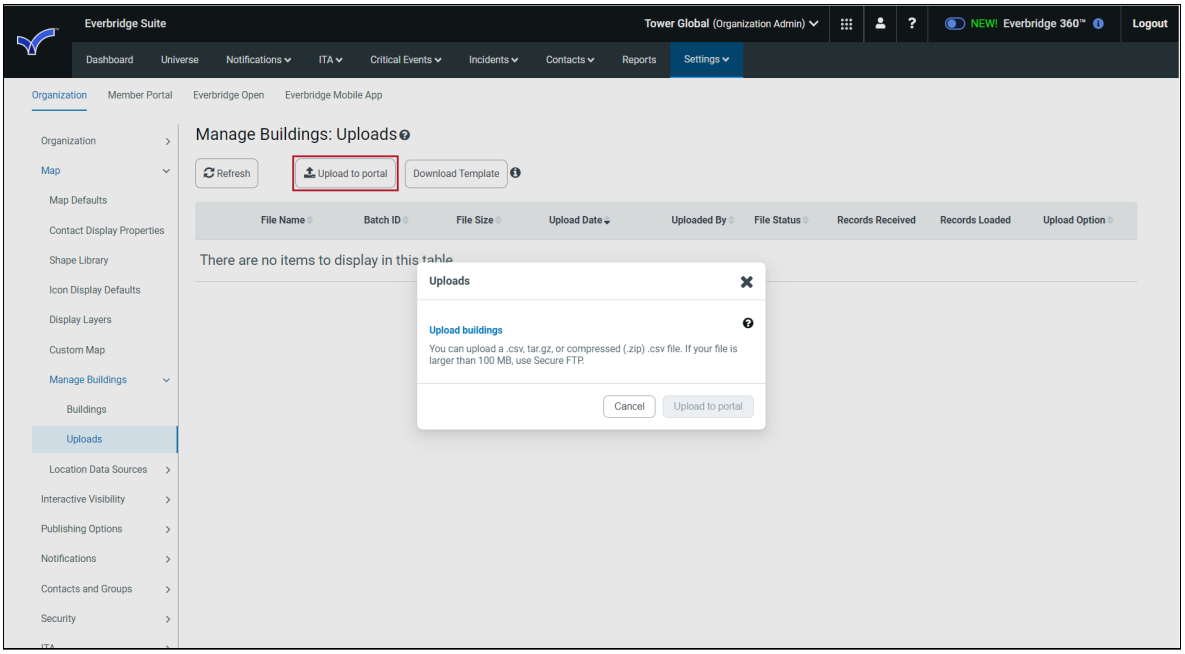
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Location ID	Location Name	Street	Apt/Suite	City	State/Province	Postal/Zipcode	Country	Floor number	Room number	Latitude	Longitude	Location Icon	
2	Work	Glendale	500 N Brand Blvd	1000	Glendale	California	91203	US	10				1	
3	Restaurant01	Din Tai Fung	177 Caruso Ave		Glendale	California	91210	US					12	
4	BUR	Bob Hope Airport	2627 N Hollywood Way		Burbank	California	91505	US					2	
5	Hospital3	USC Verdugo Hills Hospital	1812 Verdugo Blvd		Glendale	California	91208	US					3	
6	Police1	Glendale Police Department	131 N Isabel St		Glendale	California	91206	US					4	
7	Fire21	Glendale Fire Station 21	421 Oak St		Glendale	California	91204	US					5	
8	UnionBank	Glendale Union Bank	330 N Brand Blvd	160	Glendale	California	91203	US					8	
9	Restaurant02	Porto's Bakery	315 N Brand Blvd		Glendale	California	91203	US					12	
10	Jail1	Glendale City Jail	131 N Isabel St		Glendale	California	91206	US					11	
11	Jail2	Burbank PD Jail	200 N 3rd St		Burbank	California	91502	US					11	

Uploading Your Assets CSV File

After you have prepared your CSV file using the “asset-template.csv,” you can use it to upload or delete Buildings using the steps outlined below.

To upload your Buildings:

1. From the **Manage Buildings** > **Uploads** page, select the **Upload to Portal** button. The Uploads dialog is displayed.



2. Click **Upload Buildings**. The Open dialog is displayed.
3. Select the desired CSV file and click **OK**. Make sure it is a CSV file that used "asset-template.csv".
4. Select one of the following radio buttons:
    - **Uploads (Only insert new Building records and update existing Building records)** - You have selected the option to only insert new Building records and to update existing Building records. This option does not delete Building records from your Organization.
    - **Delete (Only delete existing Building records)** - You have selected the option to delete all Building records for your Organization with the records in this file.
5. Click **Upload to Portal** at the bottom of the overlay.
6. Click **Refresh** to see the change in the File Status, Records Received, and Records Loaded.
7. Click the Binoculars icon to see the upload results.
8. If your CSV **loaded with error(s)** or was **not loaded - critical error(s)**, select the corresponding tab and click Download to download a zip file containing the CSV with the error(s).
9. Refer to Buildings for details.

Uploading Last Known Locations

Your contacts can have two types of locations:

- **Static** - Each contact can have up to five fixed addresses in his or her profile. These fixed locations do not typically change, such as a work address, home address, and so on.
- **Dynamic** - Via the /dynamicLocation API (Application Programming Interface) or Secure FTP, each contact can have a temporary **Last known location** or **Expected location**, such as a restaurant address for lunch, a hospital address to visit someone, and so forth. Although the Last Known Locations are read-only in the user interface. They can be updated via Secure FTP or REST API.

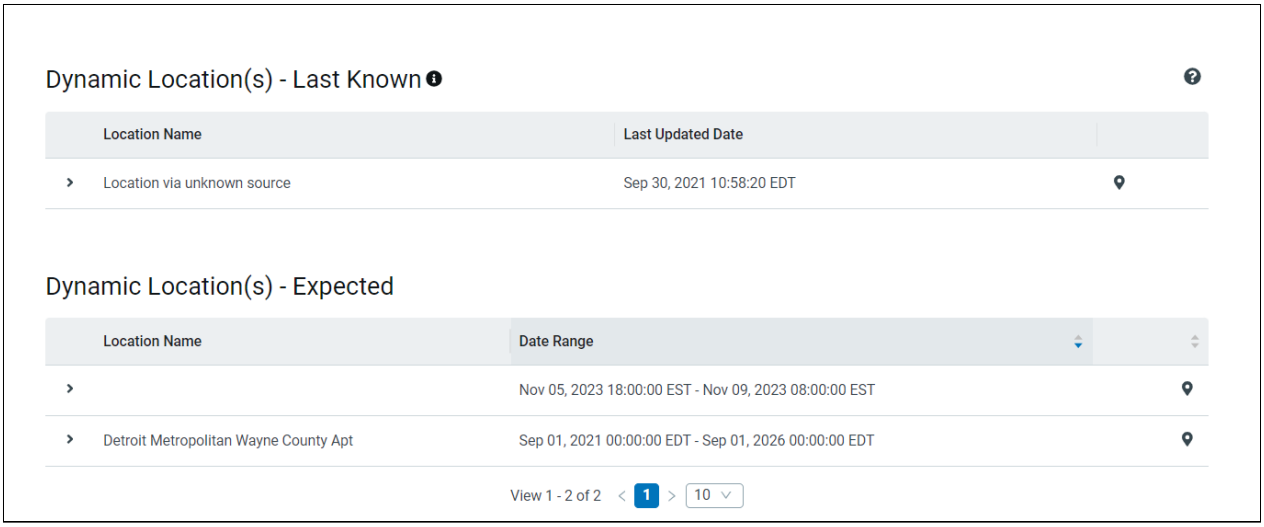
> **NOTE:** Visit the *Developers Hub* for information about the /dynamicLocation API.

To leverage this feature, you must upload a master list of Last Known Locations. Your master list can contain any number of records.

From the **Contacts** > **Contact List**, when you open a contact's profile, you can see the static locations (up to five fixed addresses) under Static Location(s) and any Dynamic Locations. The dynamic locations display Last Known Location(s) or Expected Location(s).

Each time Everbridge receives geo-location data from the Everbridge Mobile App (from Solicited Messages, Unsolicited Messages, SOS, Safe Corridor, Check-In, and Emergency Call), the contact's Last Known Location for the Everbridge Mobile source is updated.

When you click an existing Location Name, its details are displayed. The Source can be empty, or a customized name in **Settings** > **Location Source**, **Everbridge Mobile App**, or **International SOS Mobile Check-In**.



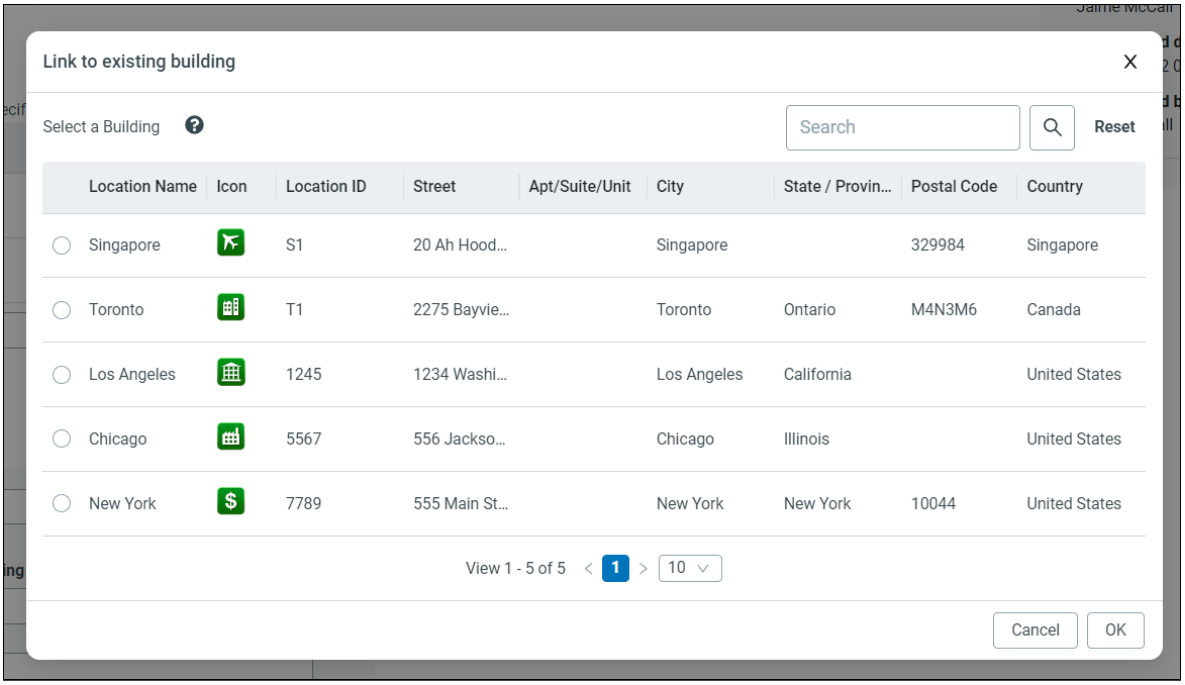
NOTE: To link a static address to a building, the building must have a Street and Country entered in the CSV file.

If there is no Expiration Date and Time in the Dynamic Locations Upload, Source Wait Timespan is used for the Last Known Location records.

Link to a static address to a building

1. From the **Contacts** > **Contact List**, click the **Pencil** icon of the desired contact name to view the contact profile.
2. Scroll to the desired static location (in the Address Information pane) that you want to link.
3. Select **Link to existing building** to link the static location to an existing building address. The Link to Existing Building dialog is displayed.

   NOTE: In order to link a static address with a building, the Street and Country must not be empty.



4. Select the radio button corresponding to the building you want to link and click **OK**.

Preparing to Upload Last Known Locations

To manage your dynamic locations, upload a CSV file from an Everbridge-defined template called “dynamicLocation-template.csv” from **Contacts** > **Upload Dynamic Locations**.

After you have uploaded your dynamic locations, you can see your contacts’ last known locations on the Universe map. See Finding Contacts on the Map.

Dynamic Location Data Elements

The following table provides details about the column headings, from left to right, in the dynamiclocation-Template.csv file. The column headings must not be changed! If you use your own spreadsheet, then ensure your column headings use the exact case-sensitive spelling and spaces.

This feature is designed to enable you to achieve the level of precision you need for your notifications. The Everbridge application will not verify the address records that you submit are actual address locations. Since you define the Latitude and Longitude for an address, you can determine the precision of the geo-point and the actual location of the geo-point.

Field	Required	Comments
Arrive Date and Time	No, but “Arrive date and time” and/or “Expiration date and time” is required. Neither of these fields can be empty at the same time.	Date and Time Format with a Time Zone Designator (TZD). Example: March 14, 2016 at 10:07:30AM Pacific Daylight Time is 2016-03-14T10:07:30.000-08:00. • The Date format is: YYYY-MM-DD • The Time delimiter is: T (required) • The Time format can be one of the following: ◦ hh:mm:ss (hours-minutes-seconds) Example: 10:07:30 ◦ hh:mm:ssZZ (hours-minutes-seconds-TZD) Example: 10:07:30+08:00. The TZD is the offset from UTC as + or - hours and minutes (HH:MM) (required).

		◦ hh:mm:ss.SSSZZ (hours-minutes-seconds-TZD) Example: 10:07:30.000+08:00 or 10:07:30.000Z. If the time element is in UTC time, then the TZD can be expressed as Z. Either the UTC ± or the Z is required. Data Type: String
Location ID	No, but at least one of the following three parts must be provided in the CSV file: 1. Location ID (if provided, the other two parts are ignored) 2. Street, City, State/ Province, Postal.Zipcode, Country 3. Latitude/Longitude	Client-defined unique identifier for the location record. Maximum Length: 50 Data Type: String For Latitude/Longitude, only Decimal Degrees (DD) are supported
External ID	Yes.	Client-defined unique identifier of the contact record. Maximum Length: 50 Data Type: String Cell cannot be empty Must be unique in the organization If the External ID does not exist in the organization, then the record is not loaded with critical errors. If more than one record in your file has the same External ID, then only one record is loaded to the database.
Expiration Date and Time	No, but “Arrive date and time” and/or “Expiration date and time” is required. Neither of these	Date and Time Format with a Time Zone Designator (TZD).

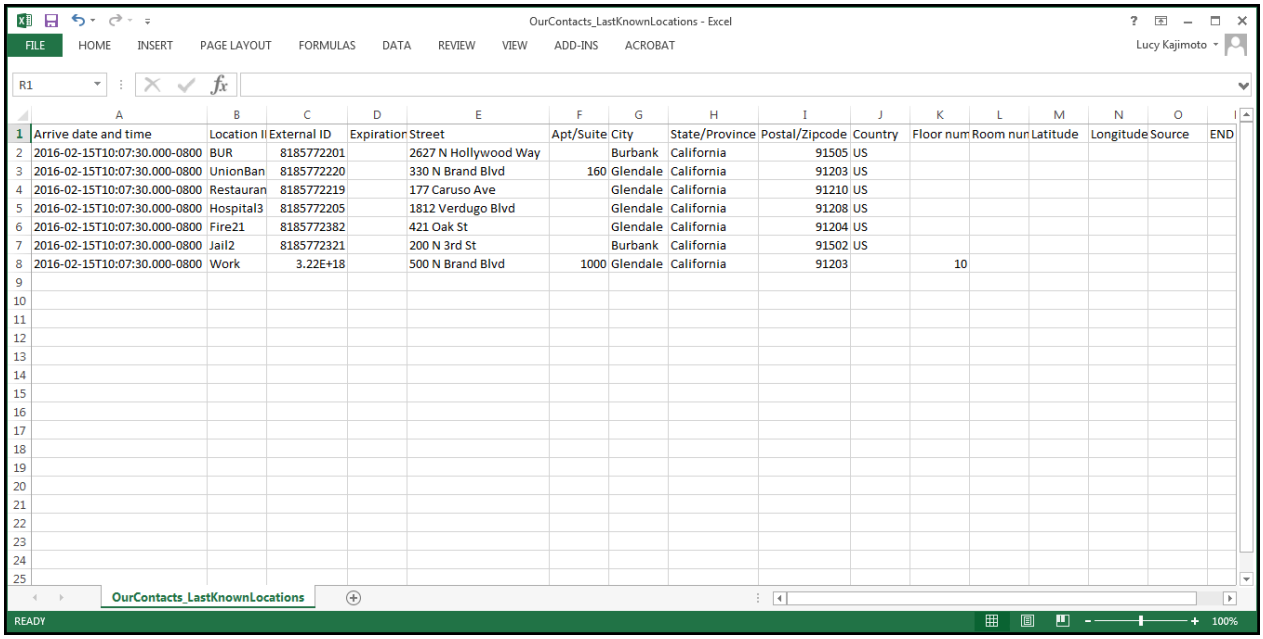
	fields can be empty at the same time.	Example: March 14, 2016 at 10:07:30AM Pacific Daylight Time is 2016-03-14T10:07:30.000-08:00. • The Date format is: YYYY-MM-DD • The Time delimiter is: T (required) • The Time format can be one of the following: ◦ hh:mm:ss (hours-minutes-seconds) Example: 10:07:30 ◦ hh:mm:ssZZ (hours-minutes-seconds-TZD) Example: 10:07:30+08:00. The TZD is the offset from UTC as + or - hours and minutes (HH:MM) (required). ◦ hh:mm:ss.SSSZZ (hours-minutes-seconds-TZD) Example: 10:07:30.000+08:00 or 10:07:30.000Z. If the time element is in UTC time, then the TZD can be expressed as Z. Either the UTC ± or the Z is required. Data Type: String
Street	No, but at least one of the following three parts must be provided in the CSV file: 1. Location ID (if provided, the other two parts are ignored) 2. Street, City, State/ Province, Postal.Zipcode, Country 3. Latitude/Longitude	Maximum Length: 100 Data Type: String For Latitude/Longitude, only Decimal Degrees (DD) are supported
Apt/Suite	No.	Apartment or Suite (or Unit) Maximum Length: 75 Data Type: String

City	No, but at least one of the following three parts must be provided in the CSV file: 1. Location ID (if provided, the other two parts are ignored) 2. Street, City, State/ Province, Postal.Zipcode, Country 3. Latitude/Longitude	City name Maximum Length: 40 Data Type: String For US addresses, jurisdiction name below county level For Latitude/Longitude, only Decimal Degrees (DD) are supported
State/ Province	No.	Administrative level below county level Maximum Length: 40 Data Type: String For US addresses, Everbridge recommends full State name, e.g., “California”
Postal/ZIP Code	No, but at least one of the following three parts must be provided in the CSV file: 1. Location ID (if provided, the other two parts are ignored) 2. Street, City, State/ Province, Postal.Zipcode, Country 3. Latitude/Longitude	For US Addresses, ZIP Code or ZIP Code + 4 Maximum Length: 10 Data Type: String Length 99999 or 99999-9999 or 999999999 if Country is “United States” For Latitude/Longitude, only Decimal Degrees (DD) are supported
Country	No, but at least one of the following three parts must be provided in the CSV file: • Location ID (if provided, the other two parts are ignored)	Full ISO country name Maximum Length: 40 Data Type: String Country name is in the ISO country list For Latitude/Longitude, only Decimal Degrees (DD) are supported

	• Street, City, State/ Province, Postal.Zipcode, Country • Latitude/Longitude	
Floor Number	No.	Floor number Maximum Length: 20 Data Type: String
Room Number	No.	Room number Maximum Length: 20 Data Type: String
Latitude	No, but at least one of the following three parts must be provided in the CSV file: 1. Location ID (if provided, the other two parts are ignored) 2. Street, City, State/ Province, Postal.Zipcode, Country 3. Latitude/Longitude	Latitude value Data Type: Precision Not validated for client jurisdiction Only Decimal Degrees (DD) are supported Minimum Value: -90.0000000000 Maximum Value: 90.0000000000 Recommend Spherical Mercator projection
Longitude	No, but at least one of the following three parts must be provided in the CSV file: 1. Location ID (if provided, the other two parts are ignored) 2. Street, City, State/ Province, Postal.Zipcode, Country 3. Latitude/Longitude	Longitude value, including negative sign Data Type: Precision Not validated for client jurisdiction Only Decimal Degrees (DD) are supported Minimum Value: -180.0000000000 Maximum Value: 180.0000000000 Recommend Spherical Mercator projection
Source	No.	Source Maximum Length: 20

		Data Type: String

The following is an example CSV file, using the “dynamicLocation-template.csv” and renaming the filename to “OurContacts_LastKnownLocations.csv”. It contains seven contacts (in lines 2-7).



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
1	Arrive date and time	Location II	External ID	Expiration	Street	Apt/Suite	City	State/Province	Postal/Zipcode	Country	Floor num	Room nur	Latitude	Longitude	Source	END
2	2016-02-15T10:07:30.000-0800	BUR	8185772201		2627 N Hollywood Way		Burbank	California	91505	US						
3	2016-02-15T10:07:30.000-0800	UnionBan	8185772220		330 N Brand Blvd	160	Glendale	California	91203	US						
4	2016-02-15T10:07:30.000-0800	Restauran	8185772219		177 Caruso Ave		Glendale	California	91210	US						
5	2016-02-15T10:07:30.000-0800	Hospital3	8185772205		1812 Verdugo Blvd		Glendale	California	91208	US						
6	2016-02-15T10:07:30.000-0800	Fire21	8185772382		421 Oak St		Glendale	California	91204	US						
7	2016-02-15T10:07:30.000-0800	Jail2	8185772321		200 N 3rd St		Burbank	California	91502	US						
8	2016-02-15T10:07:30.000-0800	Work	3.22E+18		500 N Brand Blvd	1000	Glendale	California	91203		10					
9																
10																
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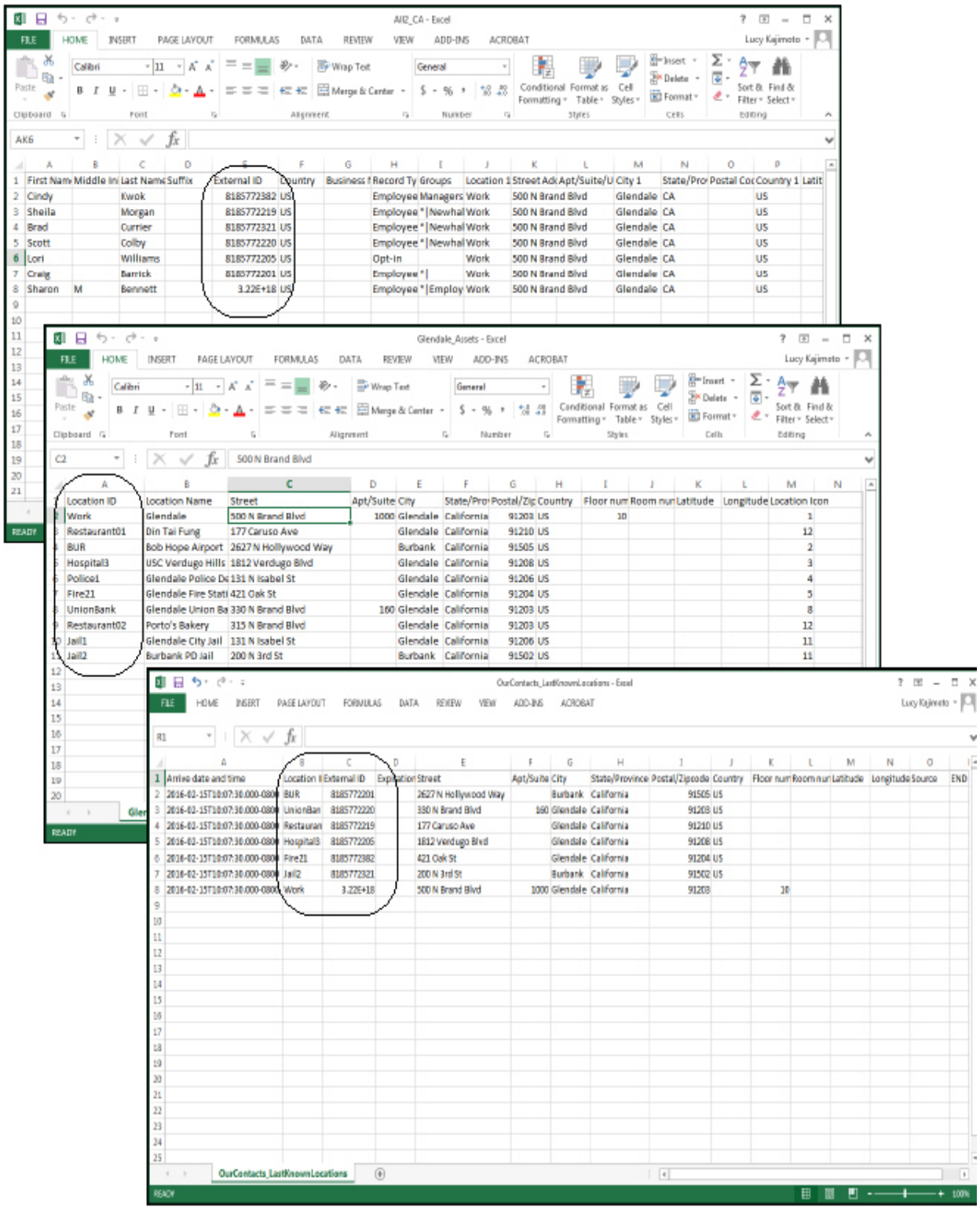
In the following example, note that the External IDs are from a Contact data file (“All2_CA.csv”), and the Location IDs are from an Asset data file (“Glendale_Assets.csv”).



Uploading Dynamic Locations Data File Via Secure FTP

By configuring your computer and Secure FTP (File Transfer Protocol) software to work together, you can programmatically submit the CSV file containing your Dynamic Location records. The computer system needs to add and place the data file in the location configured in the Secure FTP software. The Secure FTP software is scripted to perform the transfer.

Submit a Dynamic Location data file via Secure FTP

1. From the **Settings** tab at the Organization level, select **Contacts and Groups** > **Security**.
2. With your IT department, use Secure FTP to upload contact data files (replacing the “contact data file” with your “dynamic location data file” generated by using the Everbridge-defined dynamicLocation-template.csv).

   > **NOTE:** The Access Instructions are intended to guide you in exploring and testing the Everbridge Secure FTP connectivity. They do not provide instructions for developers since Everbridge does not know which tool your organization uses to develop your FTP client. Contact your IT department regarding third-party tools and/or any source code for interfacing with an FTP server.

3. Prepare your Dynamic Location data file. (See Preparing to Upload Last Known Locations.)
4. Ask your IT department to configure your computer system and Secure FTP software. The Secure FTP software is scripted to perform the transfer.

   On the server, use the following folders as destinations for your contact data file:

   - If you upload Dynamic Locations, drag your CSV file to **Dynamic Location** > **Update Folder**.
   - If you upload building “Update,” drag your CSV file to **Asset** > **Update Folder**.
   - If you upload building “Delete," drag your CSV file to **Asset** > **Delete Folder**.
5. Click **OK**.

Upload Dynamic Locations Page

The application displays the following information for each upload:

- File Name
- Batch ID
- File Size
- Upload Date
- Uploaded By
- File Status
- Records Received
- Records Loaded
- Upload Option

You can perform the following tasks from this page:

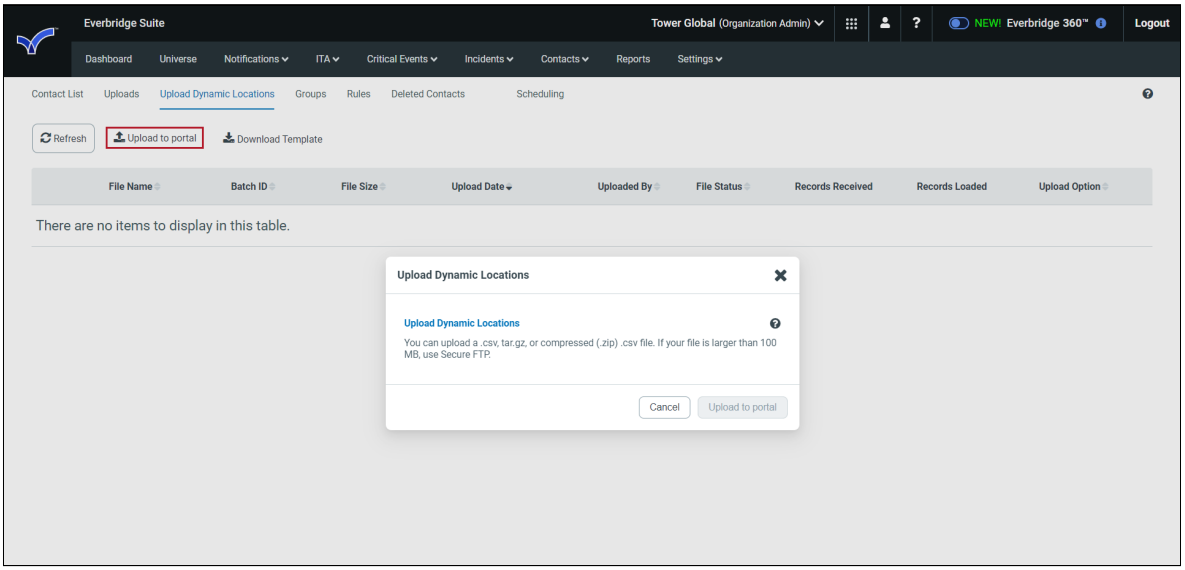
- **View** - View the Upload Results by clicking the **View** icon.
- **Refresh** - Click **Refresh** to update the File Status.
- **Upload to Portal** - Upload your custom “dynamicLocation-template.csv”.
- **Download Template** - Download the Everbridge-defined template called “dynamicLocation-template.csv”.

Upload to Portal

Using your customized “dynamicLocation-template.csv”, you can upload the file to the portal from this page.

Upload to Portal

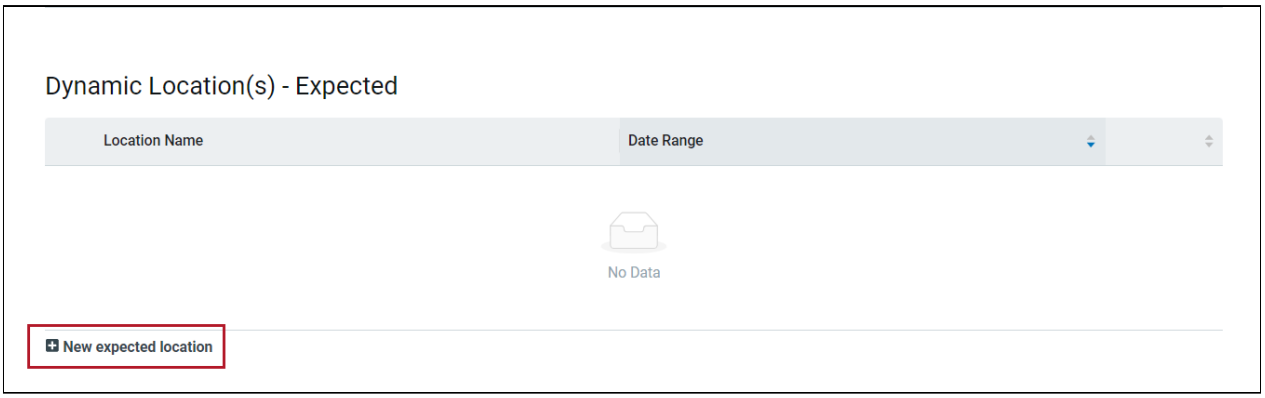
1. From the **Upload Dynamic Locations** sub-tab, select **Upload to Portal**. The Upload Dynamic Locations dialog is displayed.



2. Select **Upload Dynamic Locations** to choose a file to upload.
3. Navigate to your file and select it.
4. Click **Upload to Portal**.

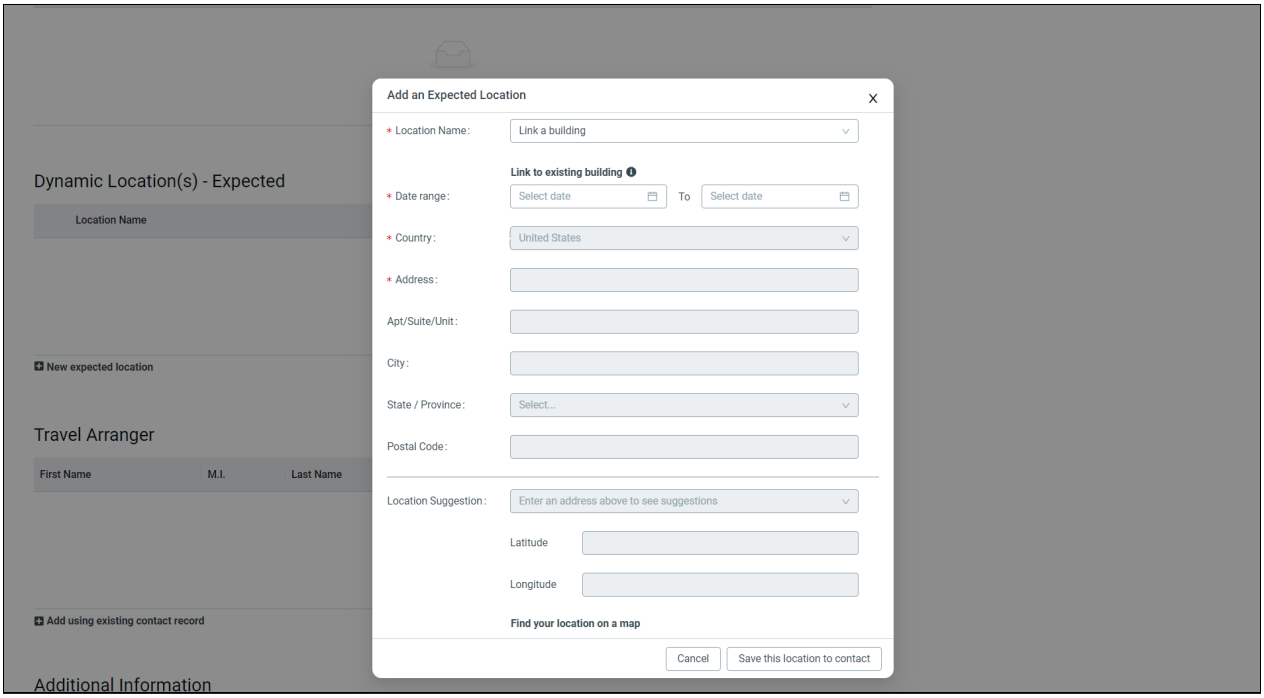
Dynamic Locations - Expected

The **Dynamic Location(s)** section of the contact record allows you to define dynamic locations for each contact. These locations can be used to include the contact in a notification sent using map addresses. When editing the contact, click **New expected location**.

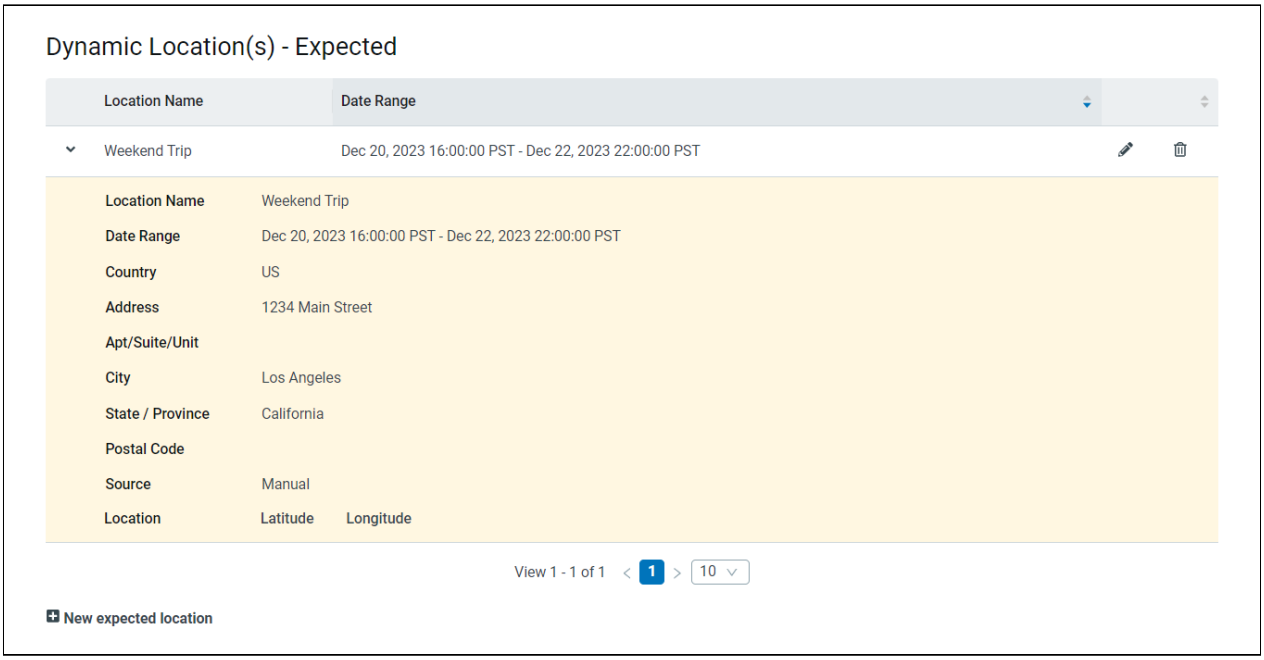


This can be used when you send a Notification to an airport or to a specific address, for example. Enter a Date Range (for example, dates the contact is expected to be at a hotel). Verify the correct Country is selected. Enter address information, up to the Postal Code field. The system tries to convert this address into a standardized format from the list.

NOTE: Expected Locations are kept up to 12 months in the past and 12 months into the future.

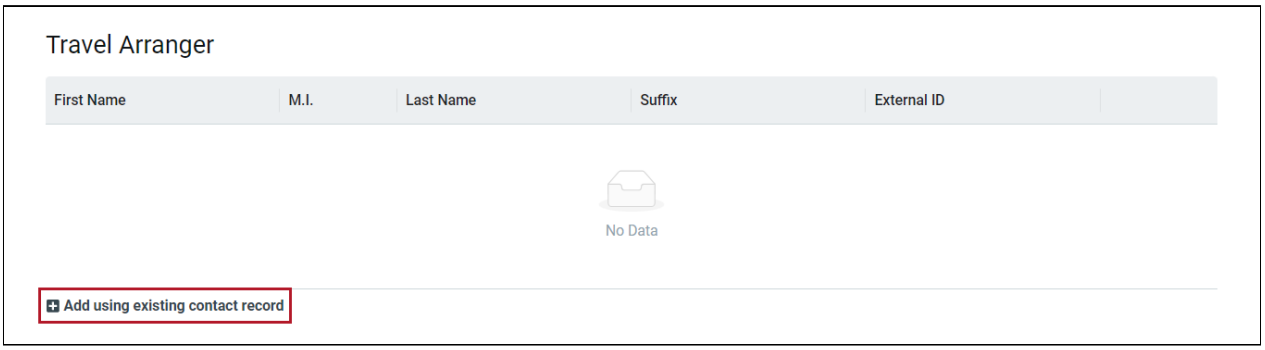


When you click an existing Location Name, its details are displayed. The Source could be MANUAL, International SOS icon, Concur, iJet, or API.

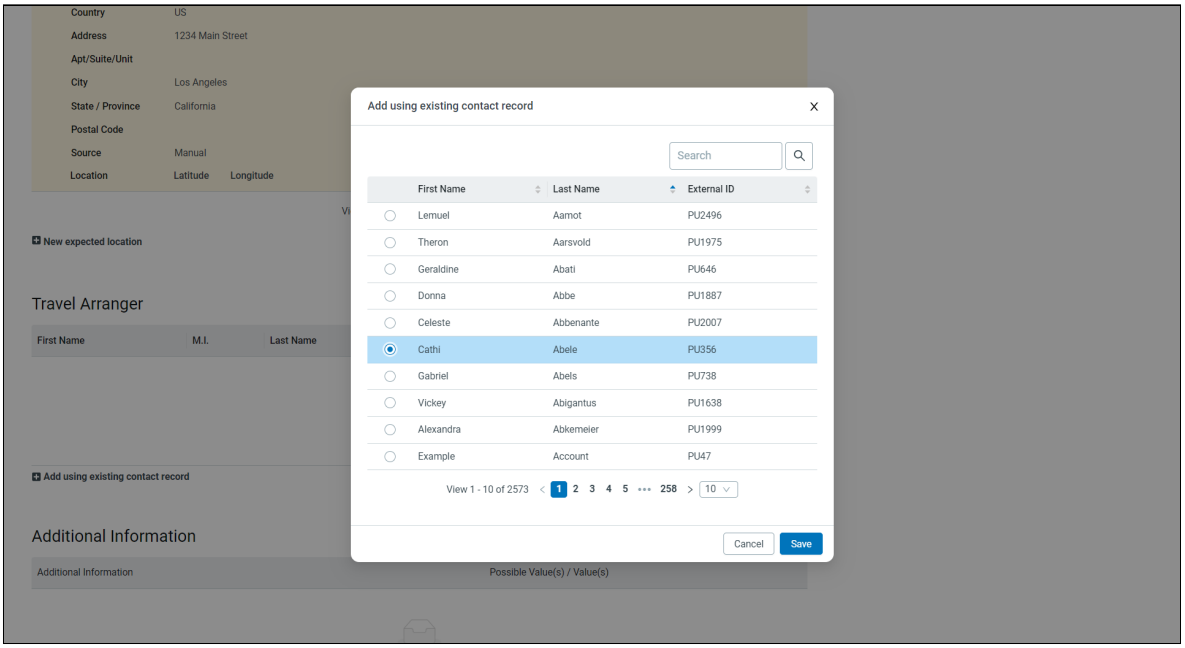


Travel Arranger

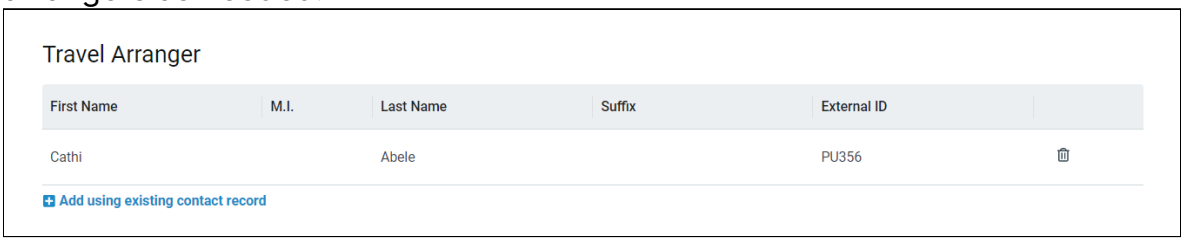
To add an existing contact as a Travel Arranger for a contact:



1. Click **Add using existing contact record** and select the name of the desired contact.



2. Click **OK** and the name is listed in the Travel Arranger pane. Add more travel arrangers as needed.

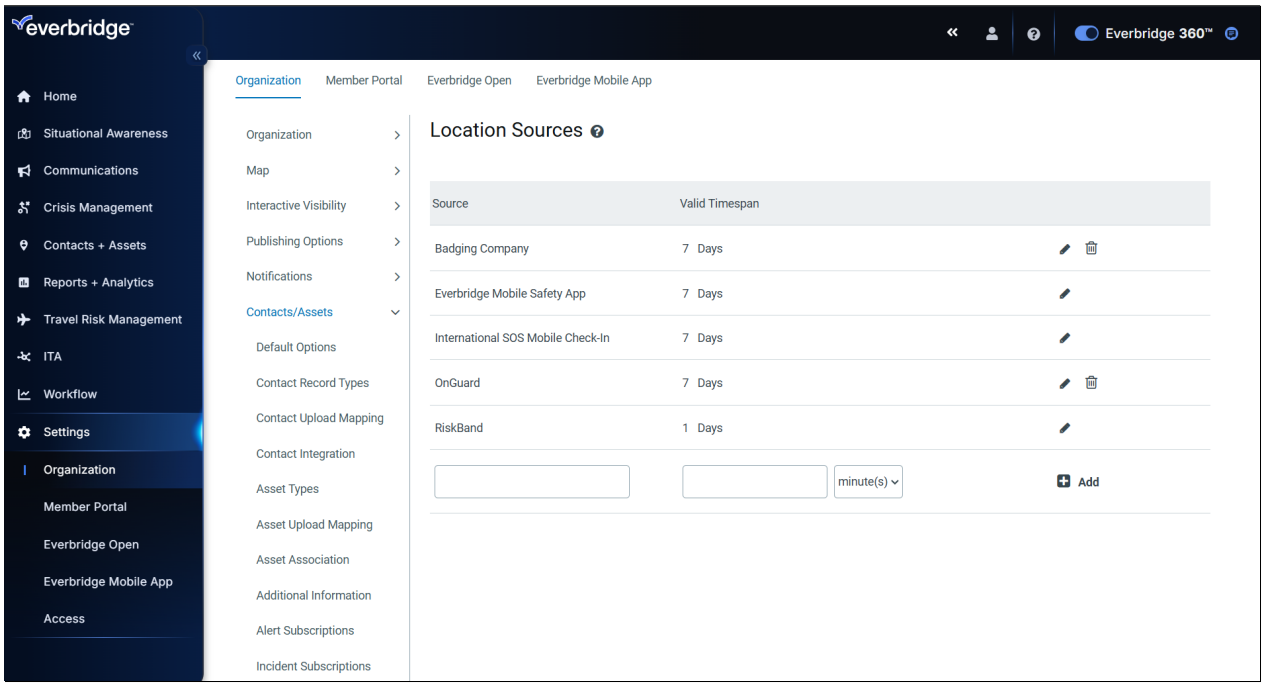


Location Sources

The **Location Sources** page allows you to configure sources from which Last Known locations for contacts will get updated. These location sources can be Physical Access Systems, the Everbridge Mobile Application, or the International SOS Mobile Check-In, which can send location data to the Everbridge platform.

- If there **is** a value for Expiration Date and Time in the Dynamic Locations Upload, this value is used.
- If there is **no** Expiration Date and Time in the Dynamic Locations Upload, the Location Source Valid Time span value is used to set the expiration of the dynamic location.
- If there is no Expiration Date, Time in the Dynamic Locations Upload and no corresponding location source, then the expiration date is set 24 hours after the dynamic location start date.

If a user edits the source and changes the Valid Time span from 8 hours to 10 hours, the records that have come into Everbridge up until that moment will still have a valid time span of 8 hours. However, once the Source changes have been saved, the new records coming next will have a valid time span of 10 hours.



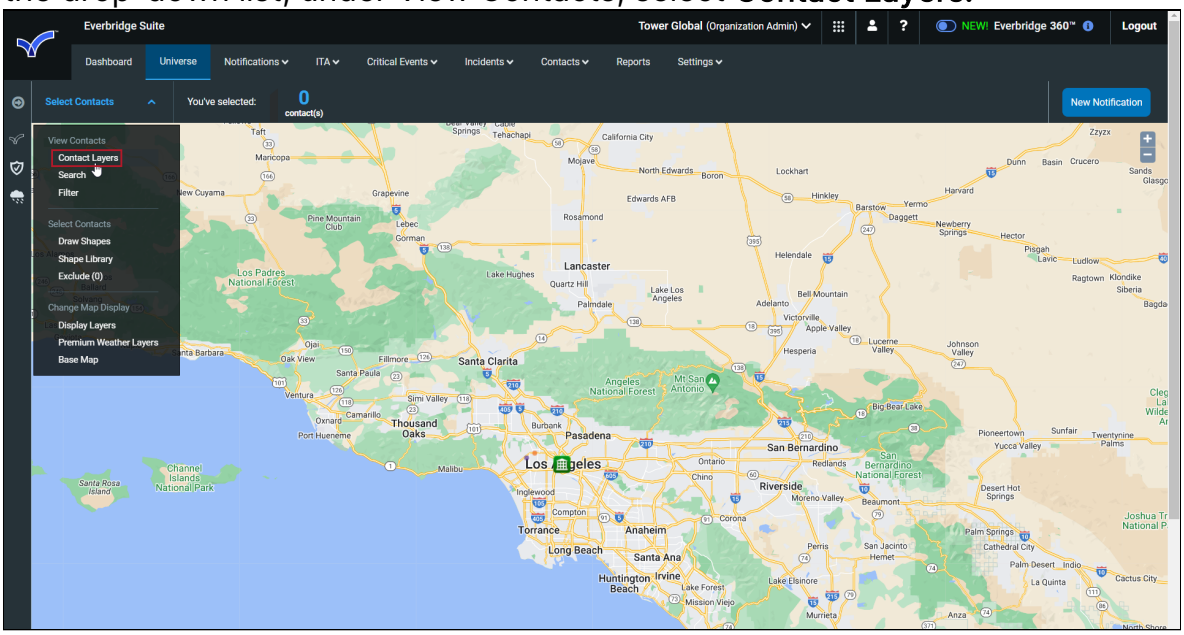
To add a new location source, enter the Source name and number of minutes, hours, or days. Then, click **Add**.

Finding Your Contacts' Last Known Locations

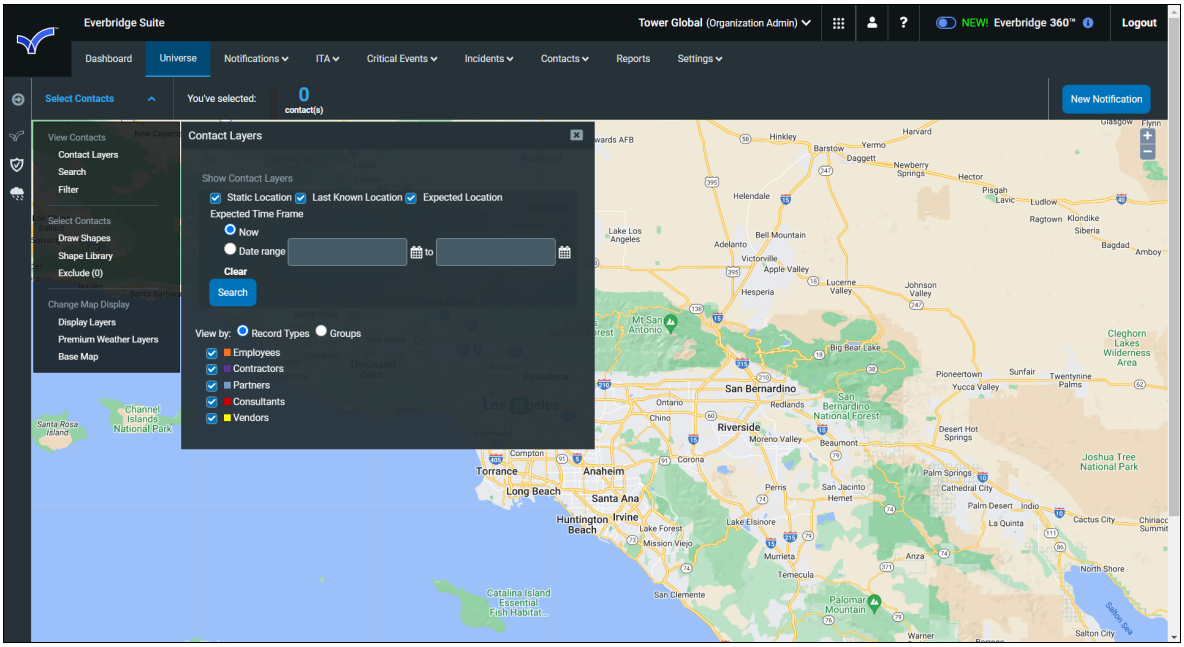
After you have uploaded the Buildings that are important to your Organization and uploaded the Last Known Locations of your contacts, you can see your contacts' whereabouts on the Universe map.

To find your contacts' Last Known Locations:

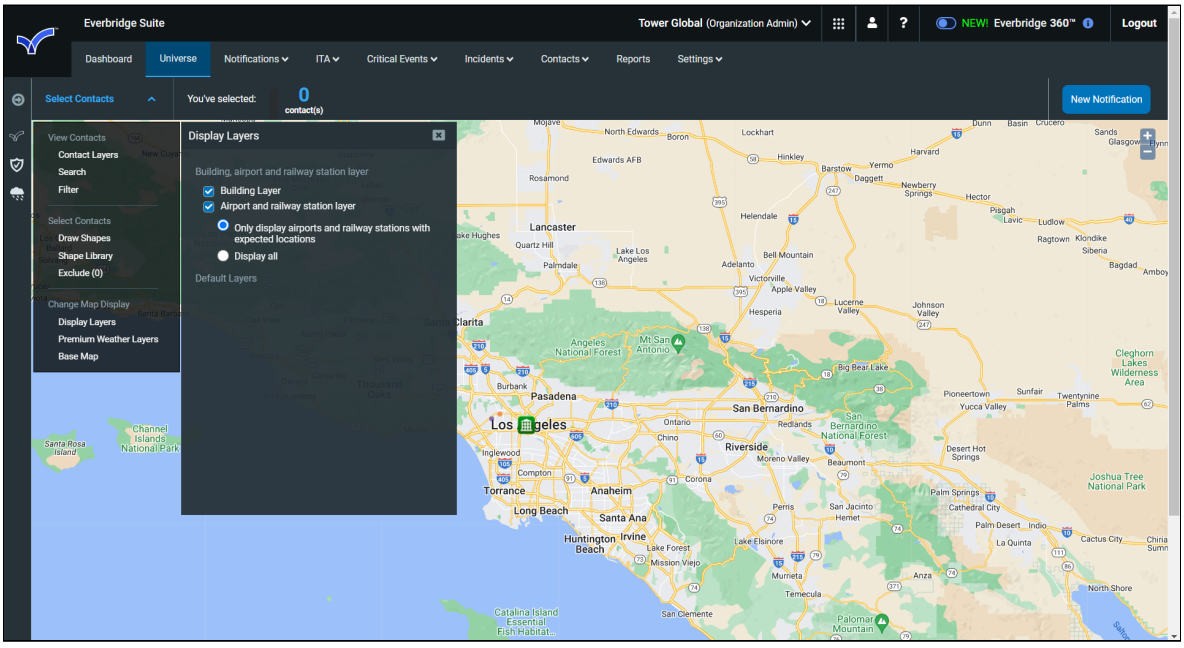
1. From the **Universe** tab, click **Select Contacts** on the map, and then from the drop-down list, under View Contacts, select **Contact Layers.**



2. From the **Contact Layers** pane, select/clear the desired checkboxes: **Static Location**, **Last Known Location**, and/or **Expected Location**. Colored dots indicate the location of your contacts by record types, or who are part of groups, displayed on the map.



3. Close the Contact Layers pane.
4. Under **Change Map Display**, click **Display Layers**.



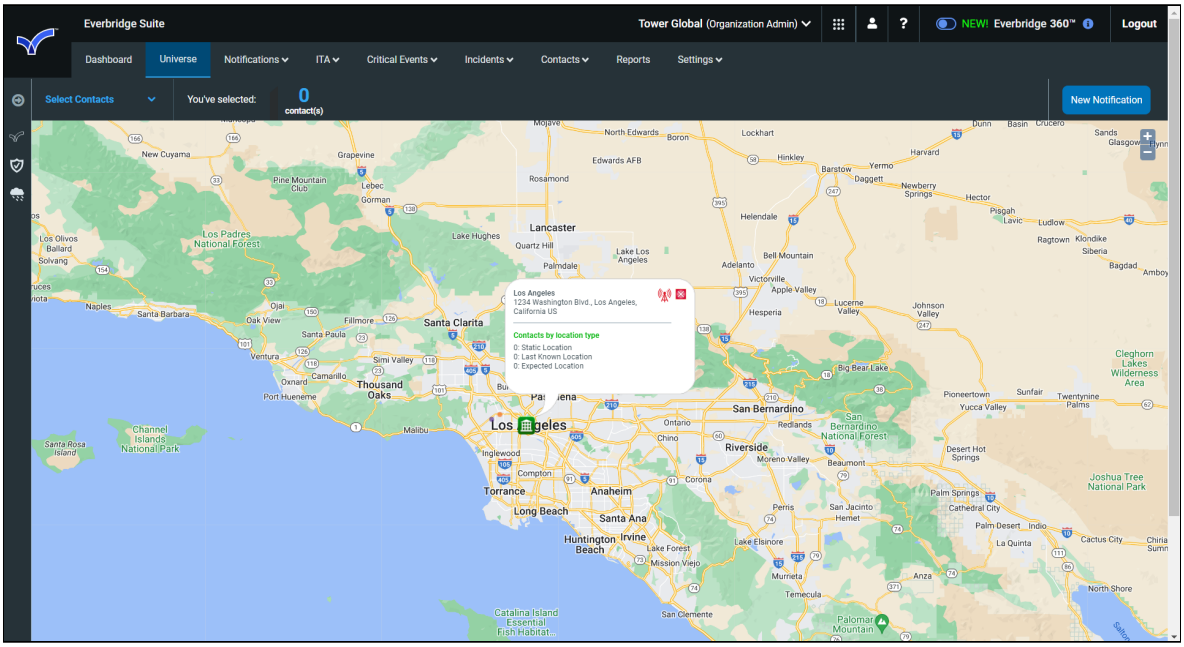
5. Click **Building Layer** and/or **Airport and Railway Station Layer**. The map icons are described next.

Map Icon	Description
	Building (green)
	Airport with no expected location (blue)

	Railway Station with no expected location (blue)
	Airport with expected location (orange)
	Railway Station with expected location (orange)

- For Building Layers:
  - The assets (buildings) that have been uploaded for your Organization are displayed as Location Icons on the map.
- For Airport and Railway Station Layer:
  - Only display airports and railway stations with expected locations
  - Display all

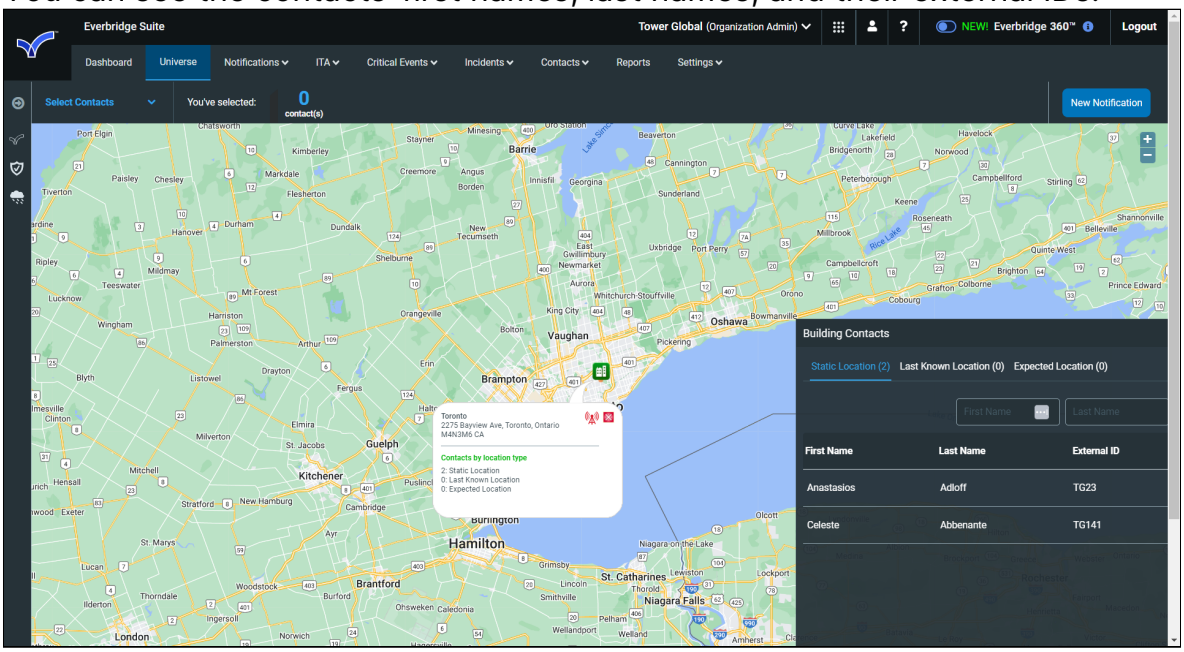
6. Close both the Display Layers panel and the Select Contacts drop-down list so you can see the map.
7. Hover the mouse over a Location icon to see its:
   - Building Name
   - Street Address, Apt, City, State, and Postal Code
   - Country
   - The number of contacts by location type



8. Click the **Location** icon to view contacts in their Static (fixed) location, Last Known Location, and/or Expected Location.

> **NOTE:** Expected Locations are kept up to 12 months in the past and 12 months into the future.

You can see the contacts' first names, last names, and their external IDs.



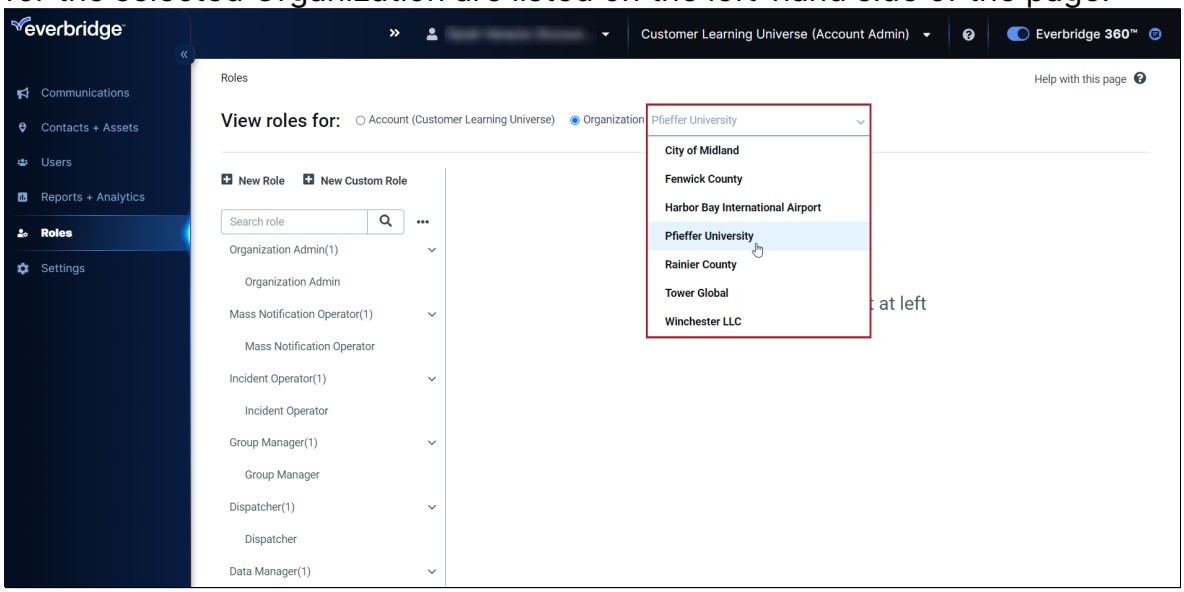
9. Select the desired sub-tab: **Static Location** or **Last Known Location**. Each sub-tab shows the number of contacts under that particular location.
    - **Static Location subtab**—A static location is a location from a contact's profile. Static locations are a home address and work address, as these do not typically change often and are more permanent in nature. A contact can have up to five static locations.
    - **Last Known Location subtab**—The last known location is a temporary location of a contact. Examples of these are any of the building types and any addresses you have uploaded to a contact.
10. Draw a polygon around the area and contacts to whom you want to send your Notification.
11. Create and send your Notification.

Dynamic Groups

Account and Organization Administrators can assign dynamic groups to Group Managers and Dispatchers to allow them access to contacts that might not be in a "group". Dynamic groups update while "groups" stay static. Dynamic groups do not display as a "group" in Everbridge Suite. Rather, it allows the Group Managers and Dispatchers to view and/or select individuals who meet the criteria at the point of notification.

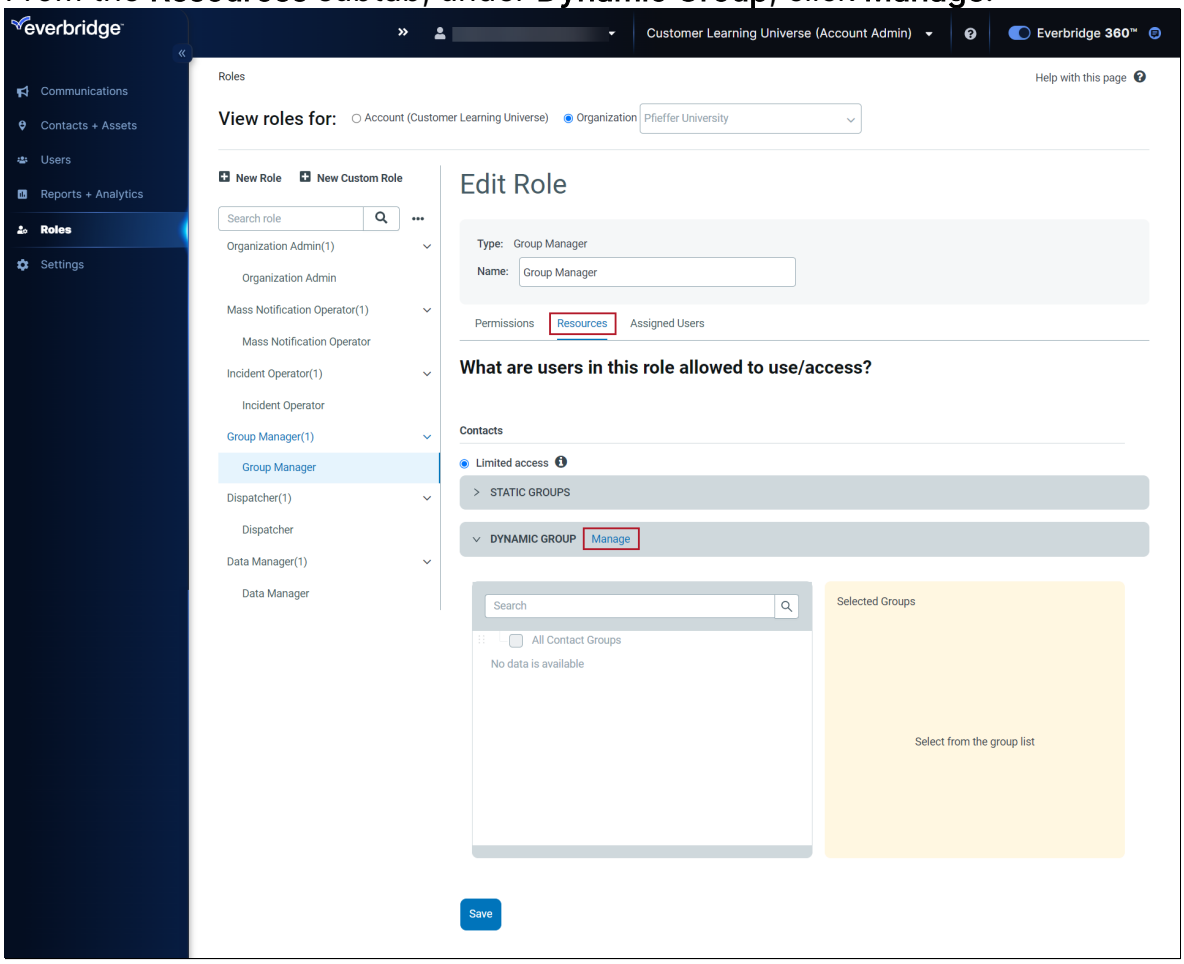
To manage dynamic groups:

1. Log in to the system.
2. Click the **Access** > **Roles** tab. The **Roles** page is displayed. The default view is the Account roles.
3. Select **Organization.**
4. Select the desired Organization from **View roles for:** menu. The Role Types for the selected Organization are listed on the left-hand side of the page.

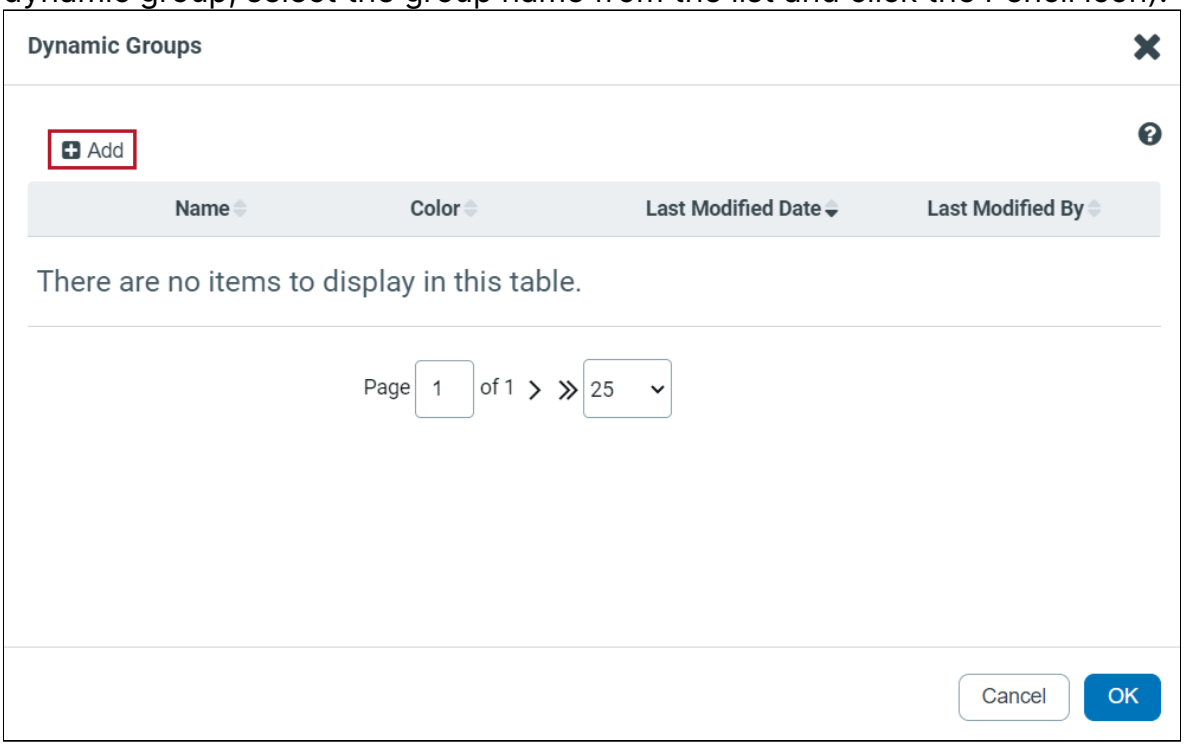


5. Select the **Role Type: Group Manager** and the role you added under this role type (for example, Group Leader). The right-hand side of the page shows subtabs:
    a. **Permissions** - Scroll down the page to see the permissions of this particular role. The permissions are locked because the new role is based on a default role. Permissions for default roles are locked.
    b. **Resources** - Displays the groups to which the users of this particular role have access restrictions.
    c. **Assigned Users** - Lists the users assigned to this particular role.
6. From the **Resources** subtab, under **Groups**, select the checkboxes of the Groups you want your Group Manager (or role under Group Manager) to be able to access.

7. From the **Resources** subtab, under **Dynamic Group**, click **Manage**.

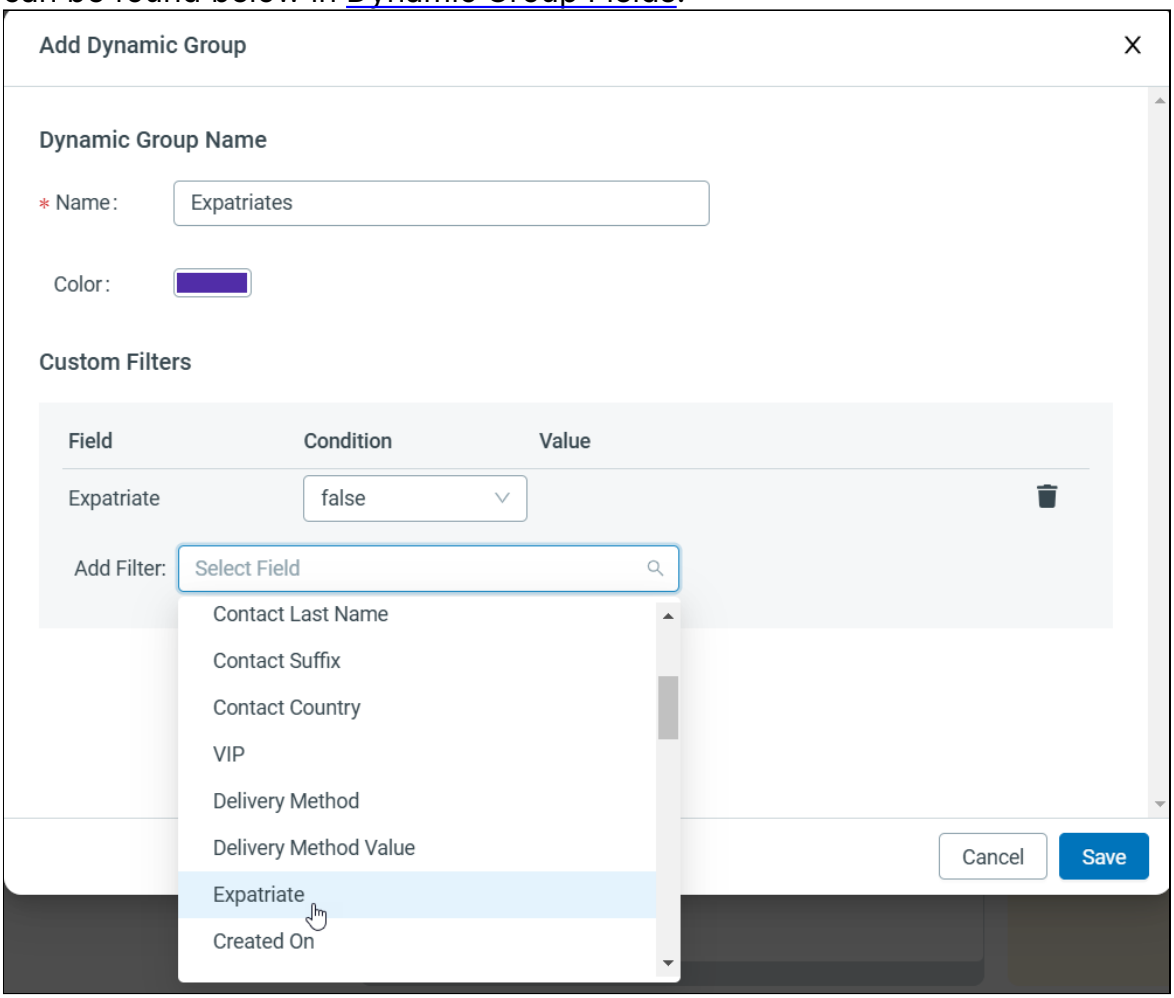


8. The **Dynamic Groups** dialog appears. Click **Add** (or to edit an existing dynamic group, select the group name from the list and click the Pencil icon).



9. The **Add Dynamic Group** dialog appears. Enter a name for the new dynamic group.
10. From the **Color** field, click the round color icon and select a different color for this dynamic group. The color you choose here is used on the map of the contacts in this dynamic group.

11. In **Custom Filters**, select a Field name from the drop-down list. The full list can be found below in Dynamic Group Fields.



12. Select a **Condition** from the drop-down list and type a Value to meet the condition.
13. Repeat Steps 11 and 12 to add more filters.
14. Click **Save**.
15. Click **OK** to see the new Dynamic Group in the Limited Access list.
16. Click **Save**.
17. Click **OK** to see the new Dynamic Group in the Limited Access list.
18. For this particular role, select up to 25 desired dynamic group names from the list and click **Save**. Preview Results display the contacts who are a part of the group.
19. Communicate to your Group Managers that they will see contacts from this dynamic group.

Dynamic Group Fields

The following fields are supported by Dynamic Groups:

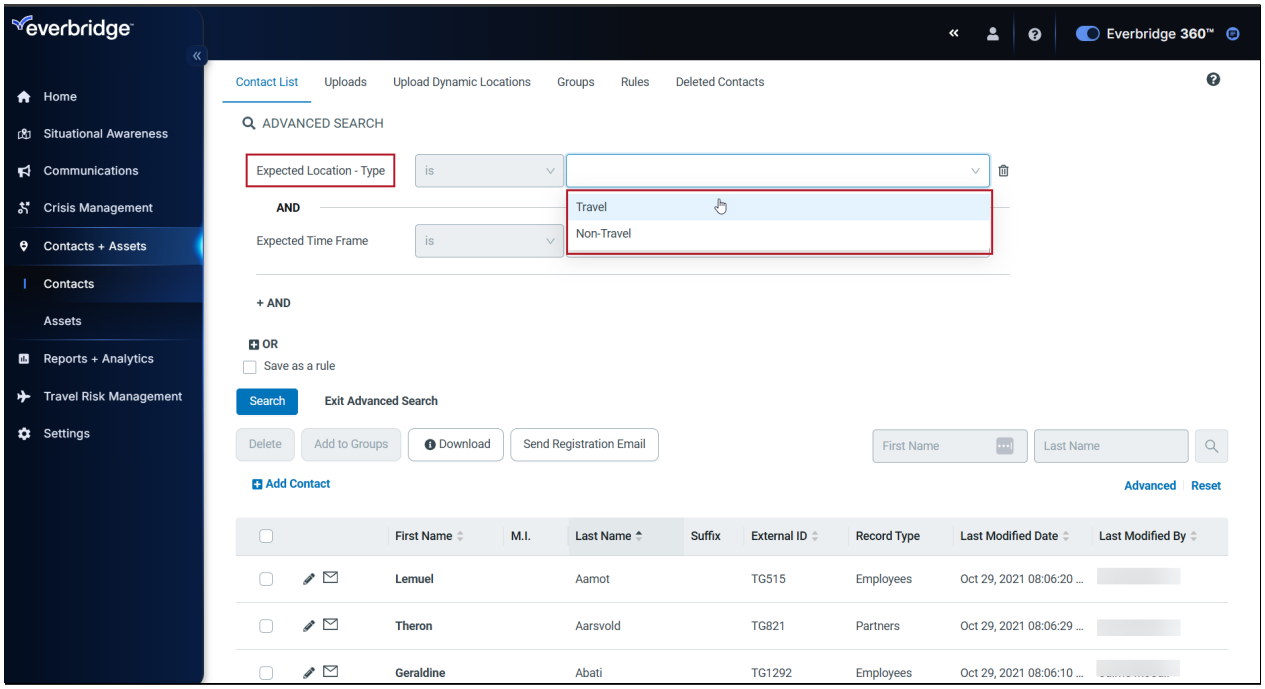
Field Type	Field Name
Contact Details	Linked User
Contact Details	Contact External ID
Contact Details	Contact First Name
Contact Details	Contact Middle Initial
Contact Details	Contact Last Name
Contact Details	Contact Suffix
Contact Details	Contact Country
Contact Details	VIP
Contact Details	Delivery Method
Contact Details	Delivery Method Value
Contact Details	Expatriate
Contact Details	Created On
Contact Details	Last Modified By
Contact Details	Last Modified On
Contact Details	Record Type
Contact Details	Registered
Contact Details	Registered Email
Contact Details	Registered On
Contact Details	Associated Group(s)
Contact Details	DeliveryMethod-pager Service
Location Details	Contact is Geocoded
Location Details	Geocode Source
Location Details	Location Name
Location Details	Location Street Address
Location Details	Location Apt/Suite/Unit
Location Details	Location City
Location Details	Location State/Province
Location Details	Location Country
Location Details	Location Postal Code
Location Details	Location Latitude
Location Details	Location Longitude
Location Details	Building Name
Location Details	Floor Number
Location Details	Last Known - Building Name

Location Details	Last Known - Floor Number
Location Details	Expected Location - Building Name
Location Details	Expected Location - Airport/Railway Station
Location Details	Expected Location - City
Location Details	Expected Location - Location Name
Location Details	Expected Location - State/Province
Location Details	Expected Location - Country
Location Details	Expected Location - Type • Travel • Non-Travel **NOTE**: When this field is added to a rule, users can further filter on the location type. If the field is not in the rule, it will return both travel and non-travel.
Location Details	Expected Location - Postal Code
Location Details	Expected Location - Travel Type
Location Details	Expected Location - Vendor Name
Location Details	Expected Location - Longitude
Location Details	Expected Location - Latitude
Travel Information	Travel Segment - Airline/Train Code
Travel Information	Travel Segment - Local Travel
Travel Information	Travel Segment - Segment Type
Travel Information	Travel Segment - To Airport/Railway Station
Travel Information	Travel Segment - From Airport/Railway Station
Travel Information	Travel Segment - Travel Type
Travel Information	Travel Segment - Supplier Name
Travel Information	Travel Segment - Destination Country
Travel Information	Travel Segment - Country of Origin
Travel Information	Travel Segment - Start Date
Travel Information	Travel Segment - End Date
Additional Information	Additional Information

NOTE: Travel Information and Dynamic Location fields are only available for Travel Protector customers.

Expected Location - Type

There are two types of Expected Locations that Travel Protector users can apply in filters or rules using **Expected Location - Type** field: Travel and Non-Travel. Customers can further filter on the location type when this field is added to the rule. If the field is not included in the rule, it will return both Travel and Non-Travel items.



Safety Settings

From the **Settings** tab, under **Interactive Visibility**, you can configure the following Safety settings:

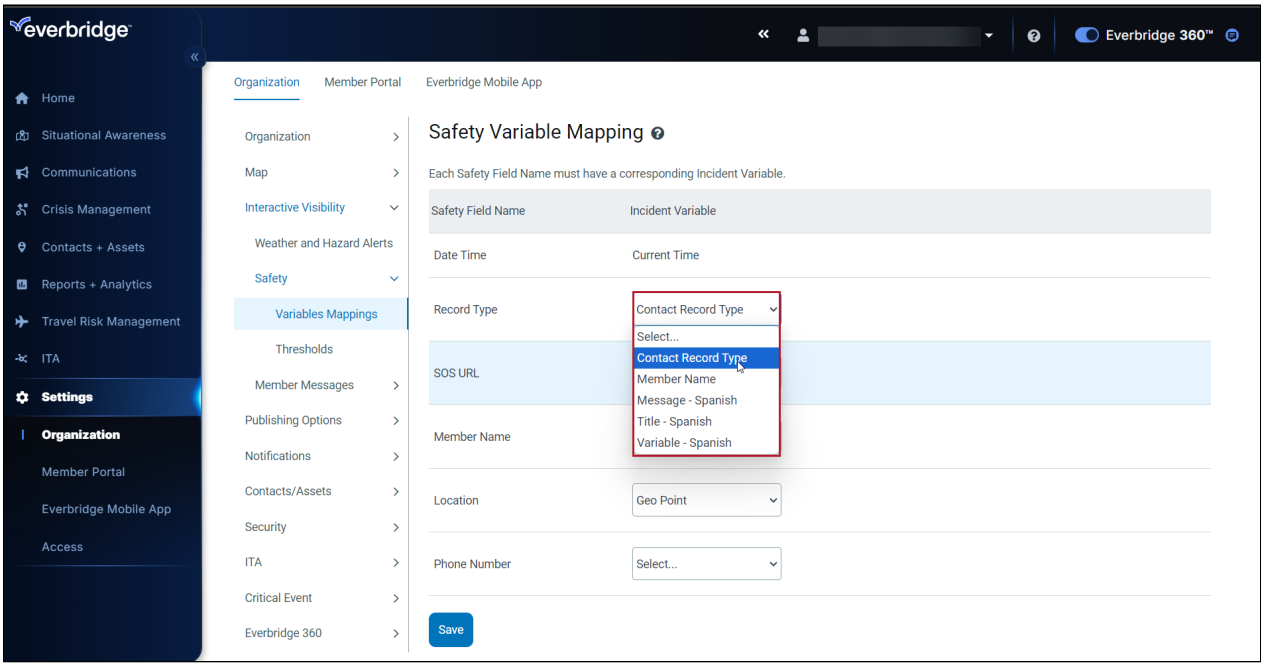
- **Variables Mappings** - A Safety Alert is triggered and the Incident uses Incident information variables that match the Safety field names.
- **Thresholds** - To automatically receive alerts from unsolicited messages, configure your Safety Thresholds.
- **SOS - RiskBand** - Everbridge Safety Connection integrates with RiskBand's wearables, allowing customers to receive SOS alerts and provide details on the contact's location.
- **CT - Harald** - Everbridge Safety Connection integrates with Harald for contact tracing. Using an Incident Template, your contacts can report “positive” for COVID-19. In turn, you can send a Contact Tracing notification to others who have been in proximity to the contact reporting “positive.”

Configuring Safety Variables Mappings

When a Safety Alert is triggered, the Incident will include the Incident variables you select here:

- Date/Time
- SOS URL
- Member Name
- Record Type
- Phone Number
- Location

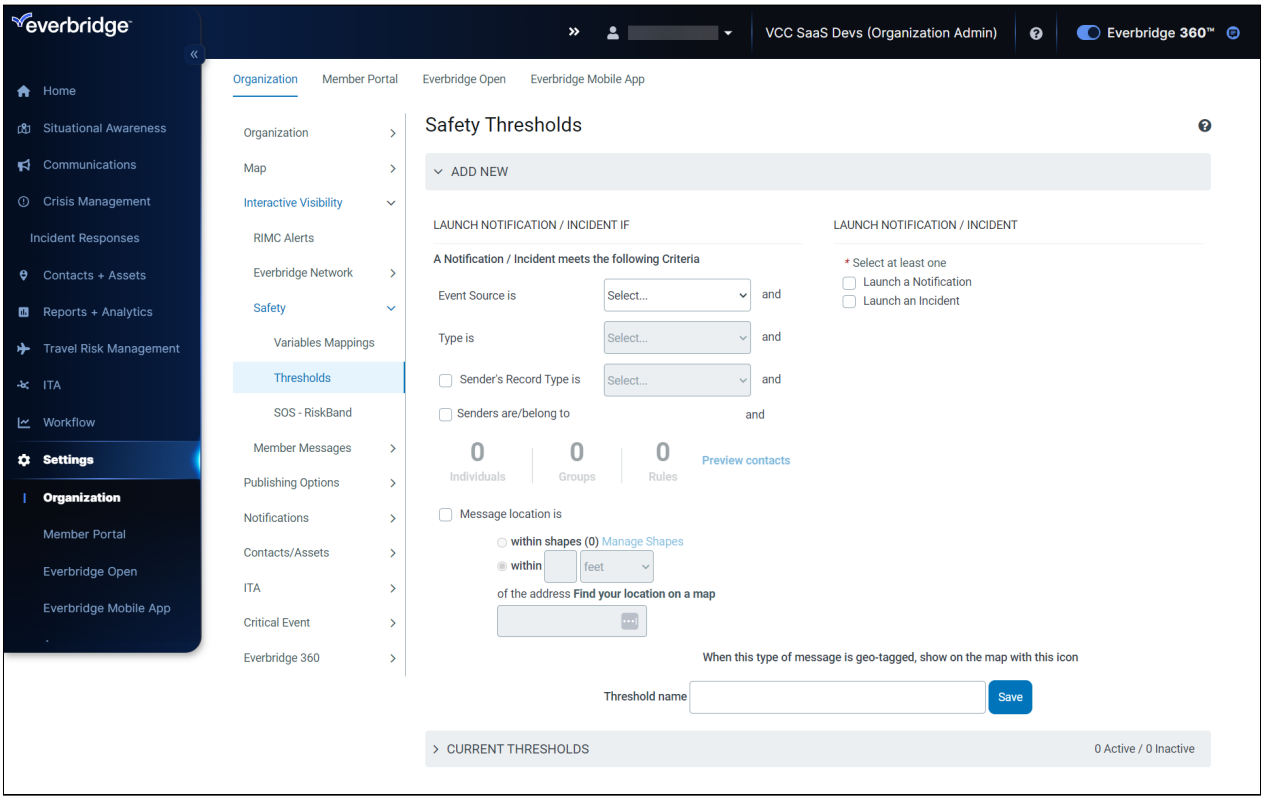
From the drop-down box of each field, select the Incident variable name to be included in your Safety Alert. Only Text Area and Text Box variable types are included in the drop-down lists.



The SOS notification will include the phone number of the person who pressed “SOS” so that the security officer can quickly reach out to the individual.

Configuring Safety Thresholds

When you select Safety Thresholds, the **Safety Thresholds** page displays any **Current Thresholds** and their on/off status. You can also add a new Safety threshold.



For each threshold, you can see the name and criteria that will trigger an alert. If the alert will launch a Notification, the name of the template is shown. The Status shows whether the threshold is currently active (ON). If it is inactive (OFF), it is still configured but is not currently monitoring selected Incidents. The number of Active and Inactive thresholds is displayed at the top of the list (right-hand corner). You can activate/inactivate a threshold by clicking the ON/OFF toggle.

Collapse the Current Thresholds list by clicking the Down arrow at the top left-hand corner of the list. Expand the **Current Thresholds** list by clicking the Right arrow at the top left-hand corner of the list.

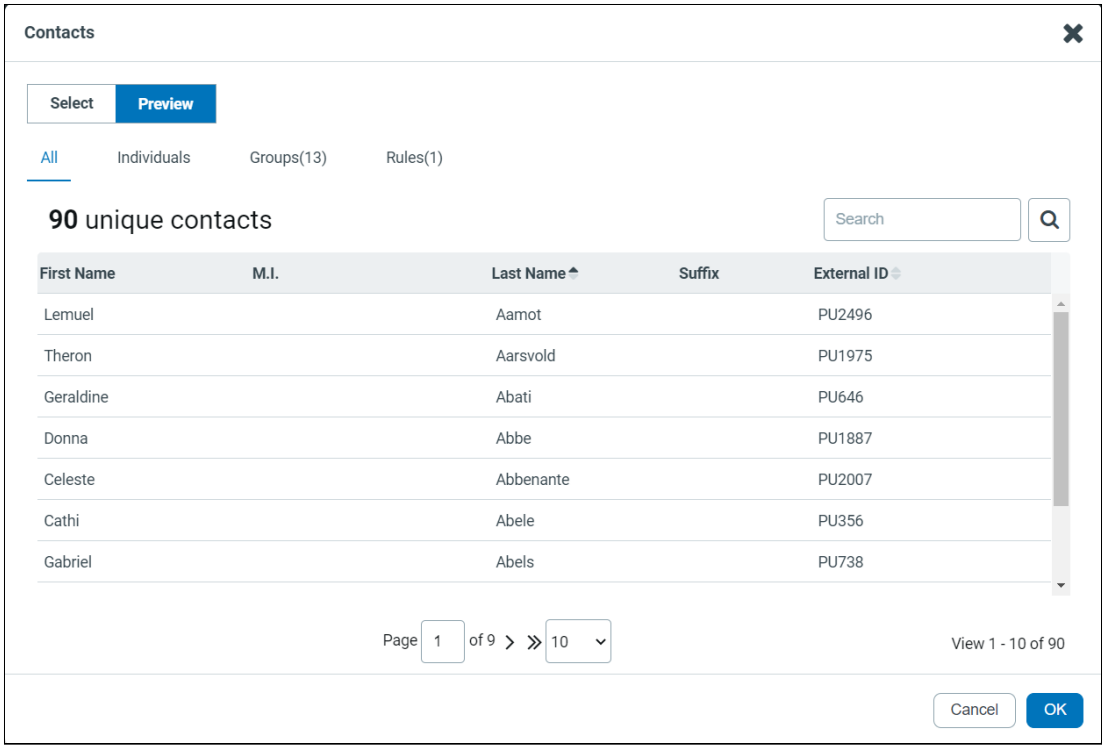
You can hide the entire panel by clicking the panel heading. Click it again to reopen the panel.

Add a new Safety Threshold

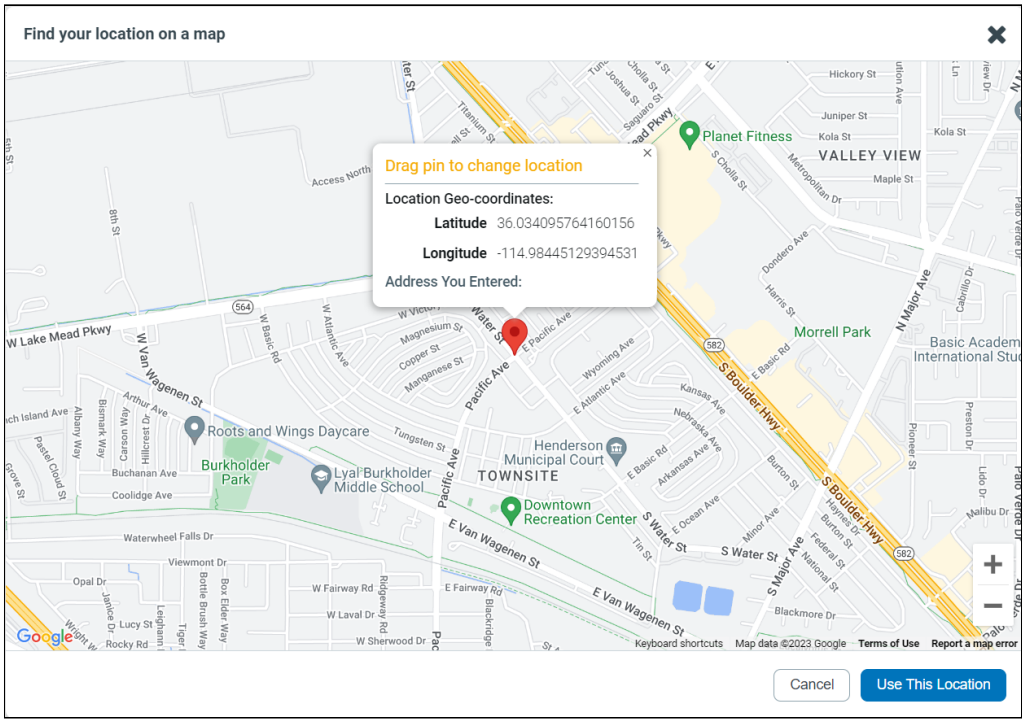
To add a new Safety Threshold:

1. Under **Add New Launch Notification/Incident If...** select from “A/An Notification/Incident meets the following criteria":
    - **Event Source is** - Select one:
        - RiskBand
        - Personal Safety Devices
        - Mobile App
    - **Type is** - Depending on the Type of Event Source you selected above, select the desired Event Type from the drop-down list:
        - SOS
        - Chaperone
        - Location
        - Phone Call
    - **Button Name is -** (for the Mobile App source only) Depending on the Type selected above, choose the desired button name from the drop-down list.
    - **Sender’s Record Type is** - Select the checkbox and select one Record Type:
        - Employee
        - Opt-In
        - Member Portal
        - Mobile App Opt-in
    - **Senders are/belong to** - Select senders (contacts in Everbridge Suite) by Individual, Group (contacts in a group), and/or Rules. This is a targeted population within your database. It is dynamic in nature. The rule is stored, not the results.

      Optionally, select **Preview Contacts**. From the **All** subtab, you see the names of all the contacts you have selected, whether as Individuals, from a group, or a rule. When previewing from a group, select the group name from the drop-down list to see the individuals in that group. Or, select **Preview** from each subtab to see the specific contacts you have selected.

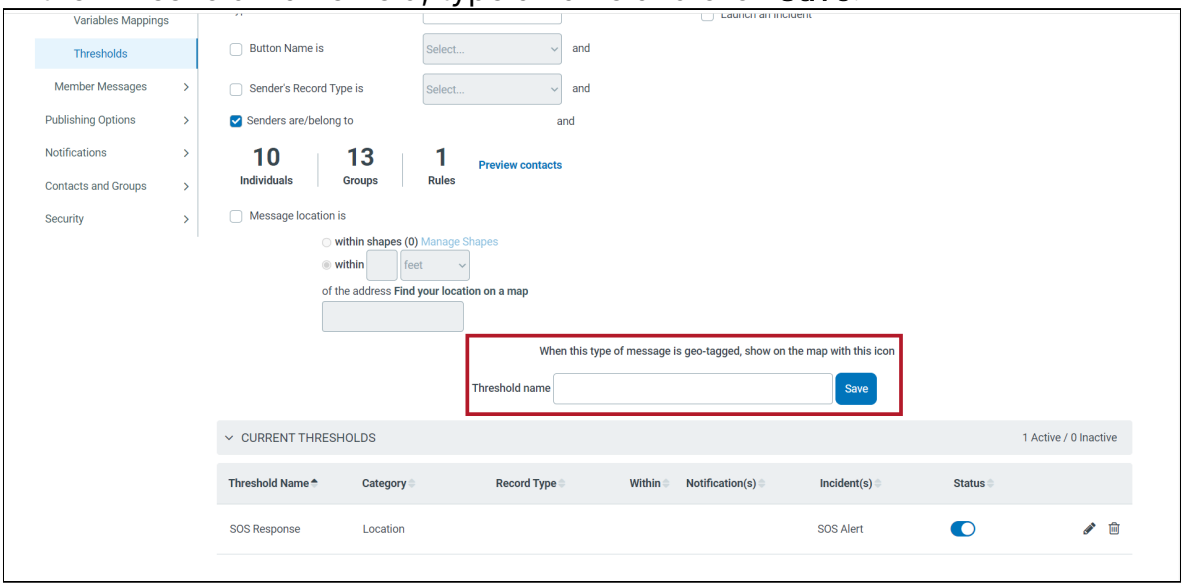


- **Message location is** - Select the checkbox, then select one of the radio buttons:
  - **Within Shapes**: Select the **Manage Shapes** link to select your shapes from the Shape Library, then enter the number of feet, meters, kilometers, or miles of the following address.



- **Address**: Type the address, then select the corresponding address from the **Please input address information for searching your location** drop-down list. (You could also select the link: **Find location on map**).

2. Under **Add New Launch Notification/Incident**, select the checkbox of at least one:
   - **Launch a Notification** - Proceed to Step 3.
   - **Launch an Incident** - Proceed to Step 4.
3. Fill in the fields for launching a Notification.
   - Optionally, select the checkbox: **Start the Event**, and enter the name of the Event.
   - Search for the desired Notification Template. Click the blue **+** sign. (To remove a Notification Template from the Threshold, click the **Trash Bin** to the left of the desired Notification Template name.)
4. Fill in the fields for launching an Incident. Search for the desired Incident Template. Click the blue + sign. To remove an Incident Template from the Threshold, click the **Trash Bin** to the left of the desired Incident Template name.
5. In the Threshold Name field, type a name and click **Save**.

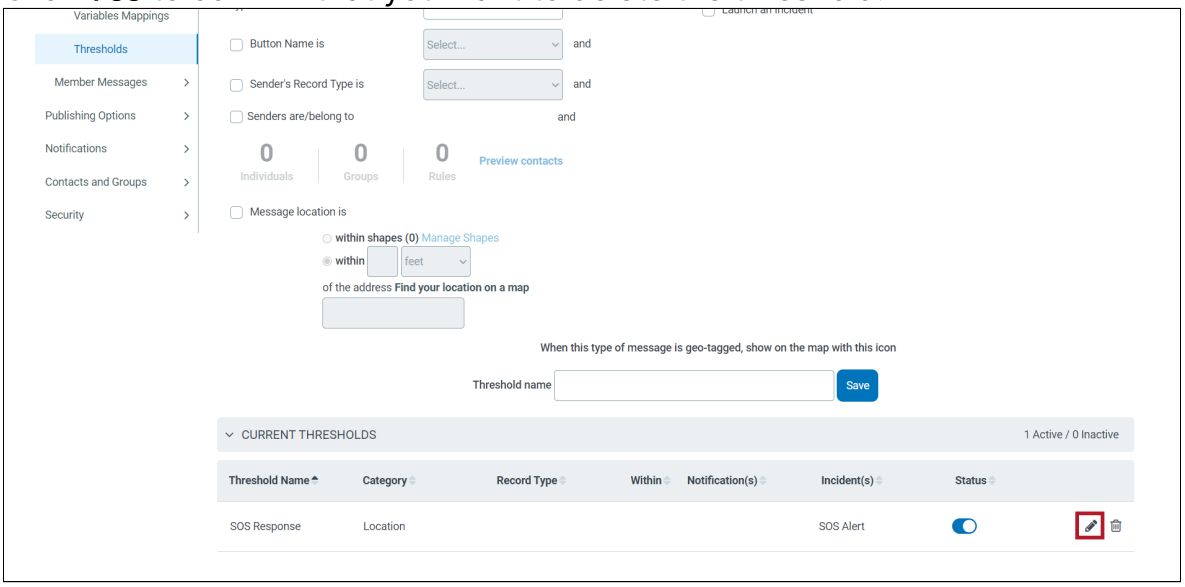


Edit an existing Safety threshold

On the Safety Threshold page, the Current Thresholds are displayed at the bottom of the page. It shows the number of thresholds that are active (Status: ON) and inactive (Status: OFF).

1. Click the **Pencil** icon corresponding with the desired threshold you want to edit. The threshold becomes inactive (Status: OFF). If not, tap the Status: ON.
2. Make your changes in the upper pane by performing the steps in the procedure .
3. Optionally, rename the threshold.

4. Click **Save**.
5. To delete a Safety threshold, click the **Trash Bin** in the row of the threshold to be deleted.
6. Click **Yes** to confirm that you want to delete the threshold.



Configuring CT - Harald

Everbridge Safety Connection integrates with Harald for contact tracing. Using an Incident Template, your contacts can report “positive” for COVID-19. In turn, you can send a Contact Tracing notification to others who have been in proximity to the contact reporting “positive”.

Create a Contact Tracing Incident template that includes your contacts.

> **NOTE:** For detailed information, see the *Everbridge - Harald Connector* documentation in the Everbridge Support Center.

To configure Harald to Everbridge integration:

1. From **Settings** > **Organization** > **Interactive Visibility** > **Safety**, click **CT-Harald**. The Harald page is displayed.
2. Click **Edit configuration**.
3. In the Edit Configuration dialog, enter the values as provided by Everbridge, then click Close:
   - URL: The URL to enable communication from the Harald connector to Everbridge.
   - User Name: A user name.
   - Secret Key: A unique key.
4. From the Report Positive drop-down list, select the Incident Template to be used to generate an Incident each time a contact is reported as COVID-19 positive.
5. Optionally, to close the Incident after the message is sent, select the check box: Auto-close the Incident.
6. Click **Save**.

Using the Safety Messages Widget

After you configure your Safety variable settings and thresholds, you can see the Safety messages once they are triggered from the Universe tab.

There are four types of alerts:

- SOS
- Chaperone
- Location
- Phone Call

> **NOTE:** Actions triggered from Self-Report and Custom Form buttons are not available in the Safety Messages Widget.

If there is no alert displayed or if you want, you can change the time frame to include older alerts — from 1 to 30 days.

If there are more alerts than can be displayed on one list, use the controls (First, Previous, Next, Last) at the bottom of the list to step through the pages.

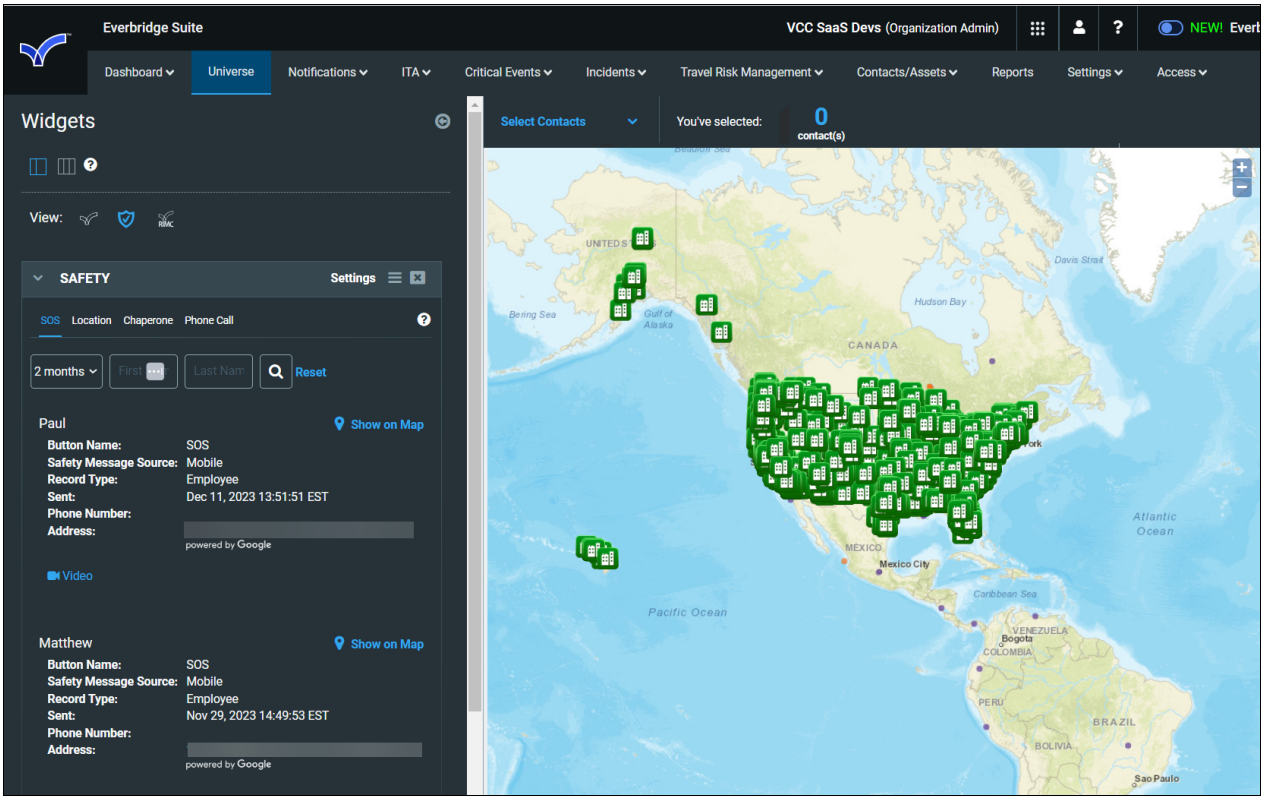
SOS

Every time a new SOS has been launched, a banner appears across the Universe map. The banner displays on the screen for five minutes. It shows the time of the SOS, and a link: **Show Me**, which shows you the SOS pin on the map. The pop-up is fixed on the page to show the SOS details.

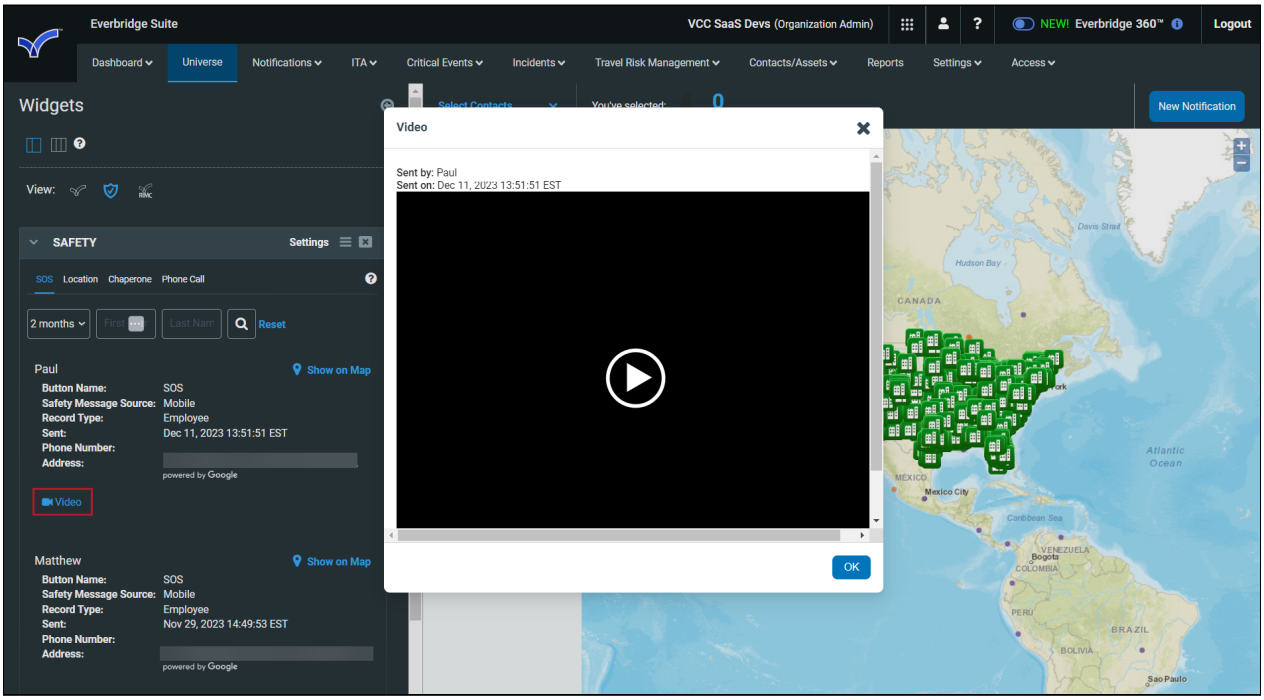
If there is more than one SOS during the five minutes, each banner displays one above the other. The default polling time is 1 minute.

Click **Show Me** in the banner to see the SOS that was initiated.

You can choose the last hour or up to the last six months. Also, search for an individual by First Name and Last Name (clear the names by clicking **Reset**).



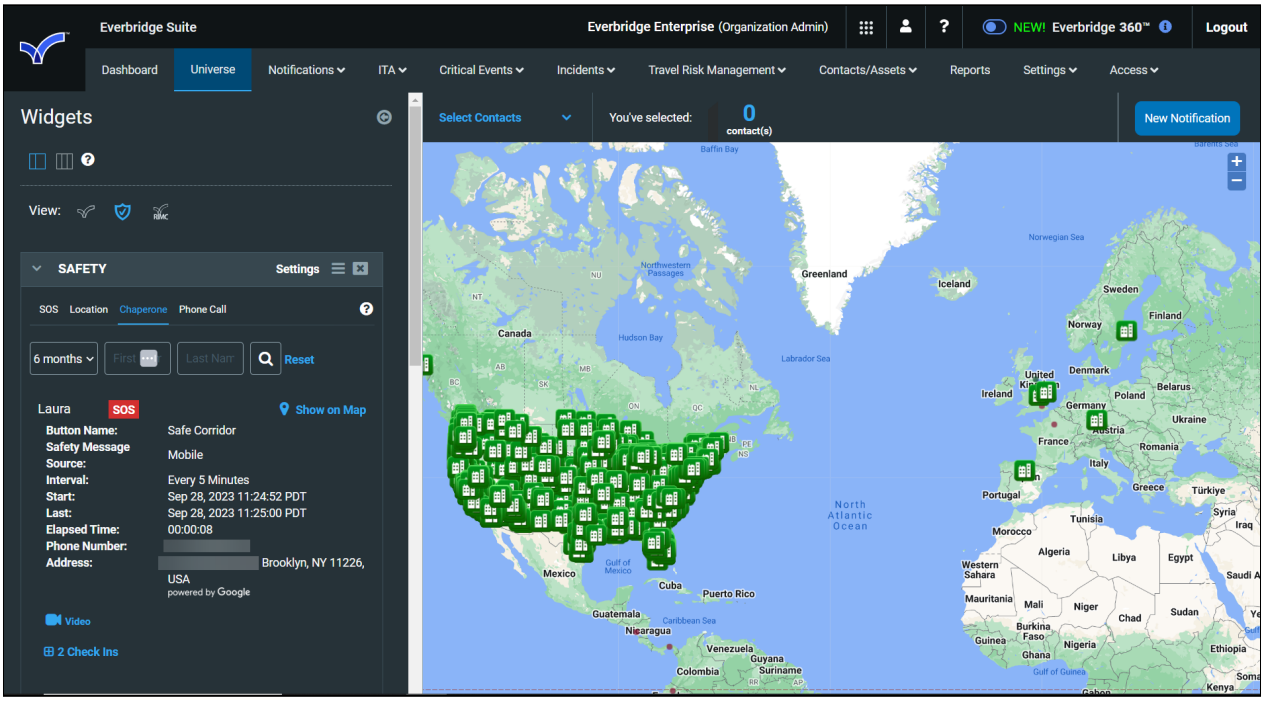
Click **Video** to see a video of what is happening during the SOS (example shown next). The video will play for two minutes.



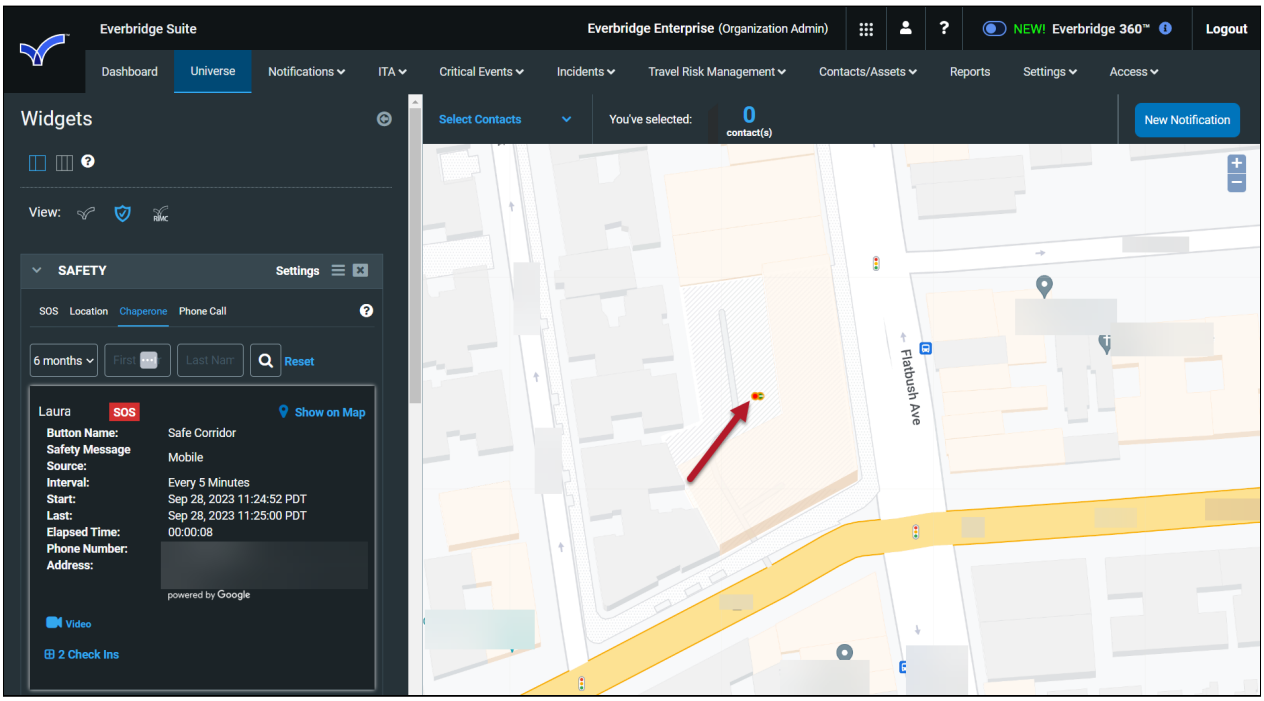
You can export videos from the Universe page. After the video has started, right-click to show the video player menu and select the **Save video as...** option.

Chaperone

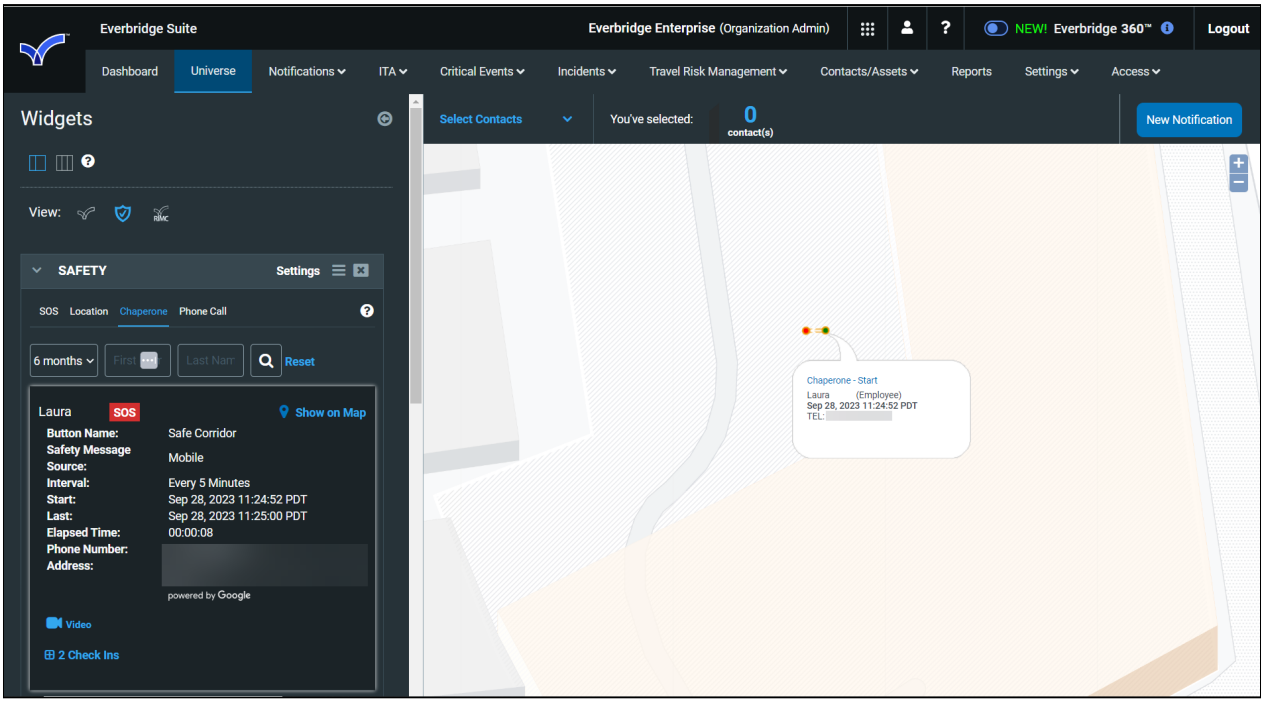
When Chaperone/Safe Corridor is triggered, the details will appear under the **Chaperone** tab. If the Chaperone resulted in an SOS being issued, then the SOS tag will be present next to the issuer's name.

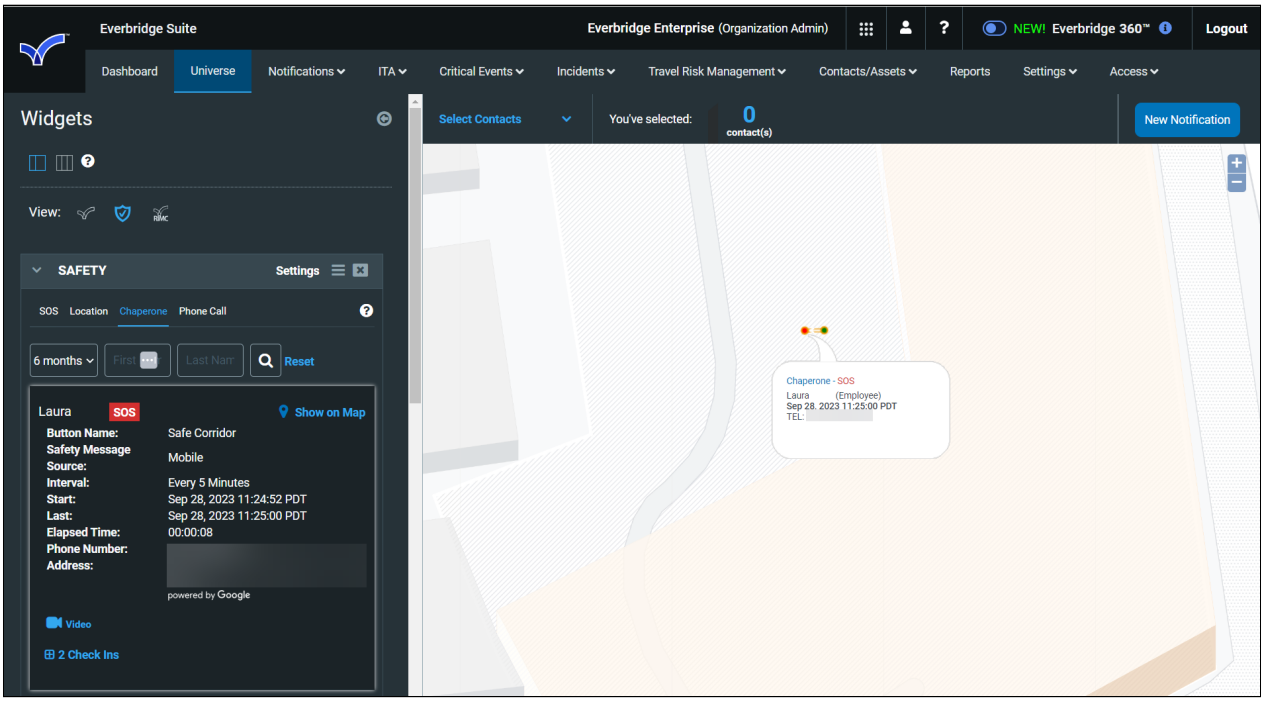


Click **Show on Map** to zoom into the exact location on the map.

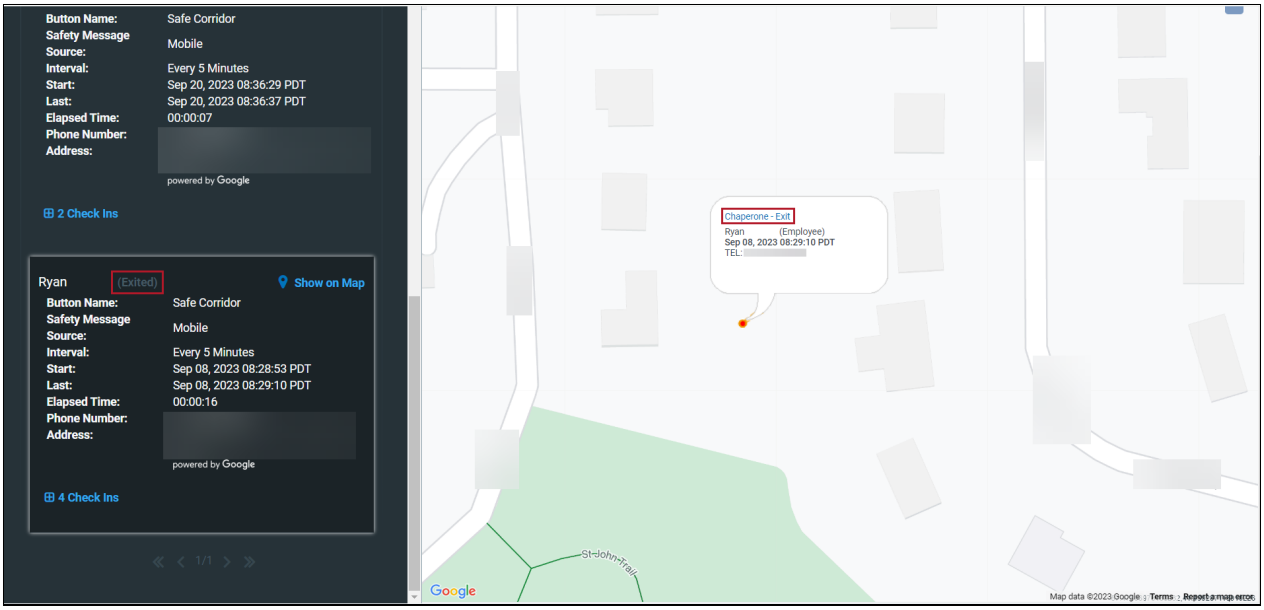


Hover the cursor over the green dot to see details about where the Chaperone was initiated. The orange dot indicates where the SOS was triggered.



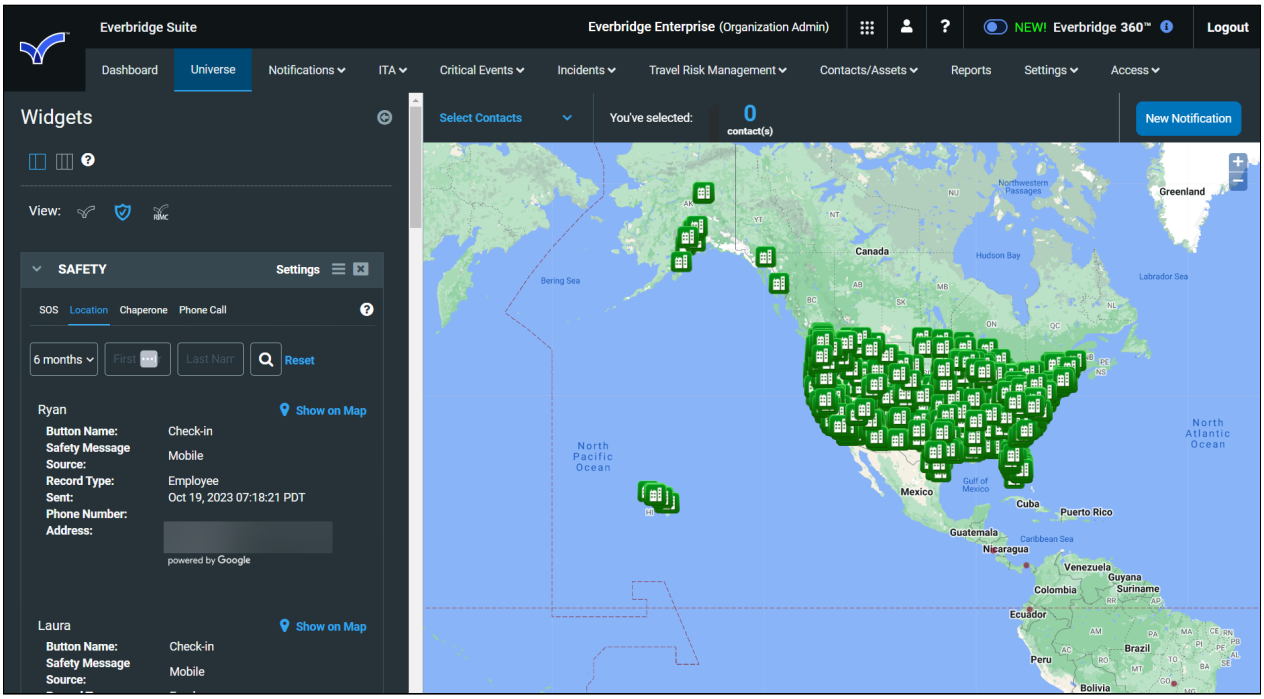


If the Chaperone/Safe Corridor was safely ended, then it will have the **Exited** tag next to the issuer's name and in the details in the **Show on Map** view.

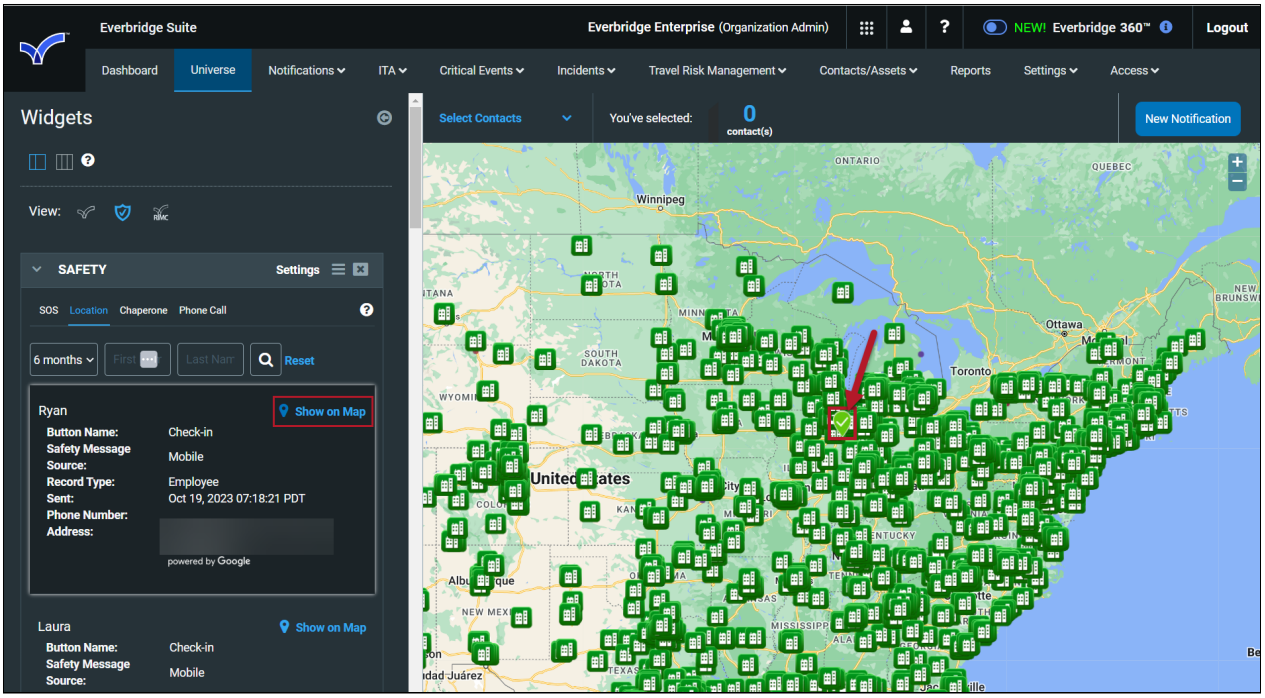


Location

Check-ins will be displayed under the **Location** tab. They can be filtered anywhere from within the last hour up to within the last six months.

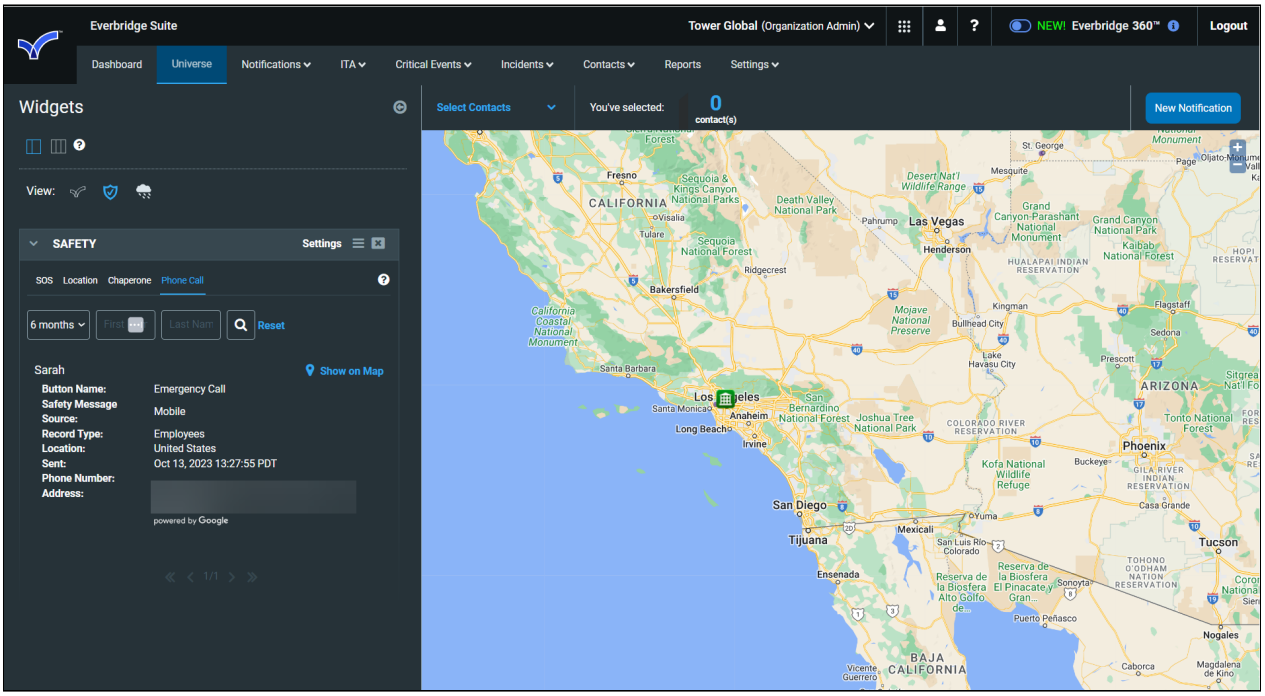


Click **Show on Map** for a check-in to see the exact location it was issued. The location will appear on the map as a green checkmark. Zoom in and out for more or less detail.

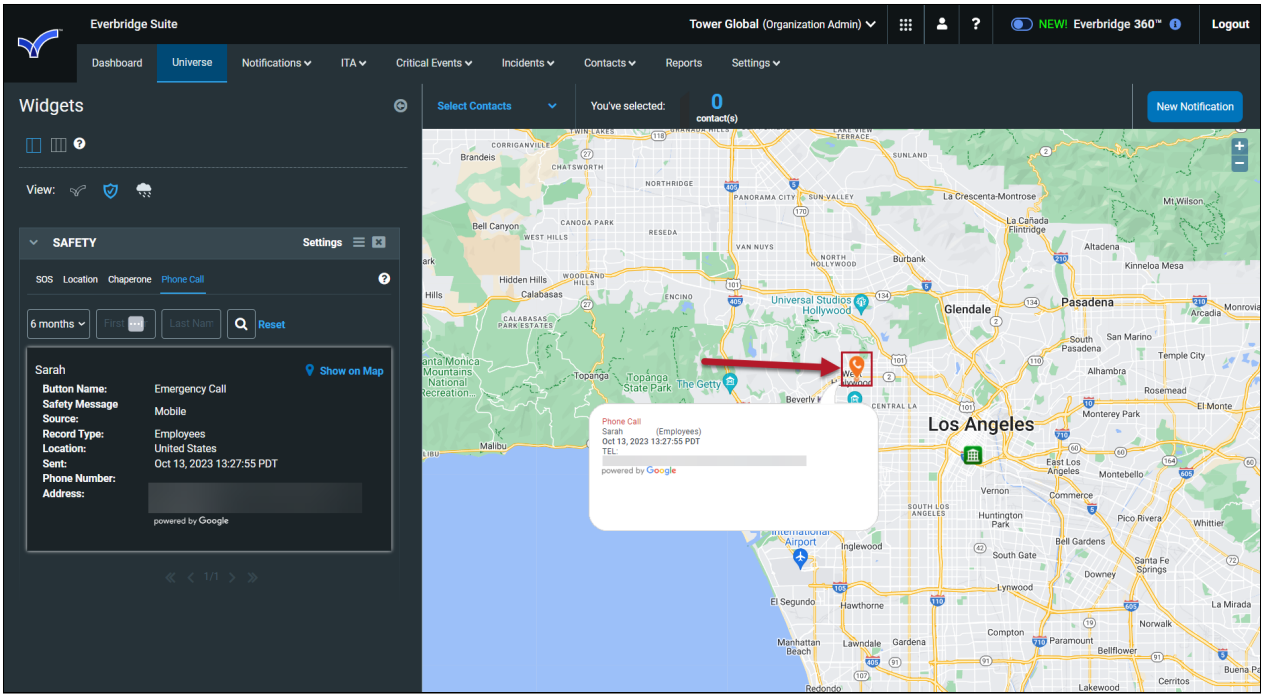


Phone Call

Emergency calls can be found on the **Phone Call** tab.



Click **Show on Map** to see exactly where the call was placed. Hover the cursor over the **Phone Call** icon on the map to view the phone number from which the emergency call was made.


Everbridge Suite
Tower Global (Organization Admin)
NEW! Everbridge 360™
Logout
Dashboard
Universe
Notifications
ITA
Critical Events
Incidents
Contacts
Reports
Settings
Widgets
Select Contacts
You've selected:
0
contact(s)
New Notification
View:
SAFETY
Settings
SOS
Location
Chaperone
Phone Call
6 months
Reset
Sarah
Show on Map
Button Name:
Emergency Call
Safety Message Source:
Mobile
Record Type:
Employees
Location:
United States
Sent:
Oct 13, 2023 13:27:55 PDT
Phone Number:
Address:
powered by Google
Phone Call
Sarah (Employees)
Oct 13, 2023 13:27:55 PDT
TEL:
powered by Google
Los Angeles
Glendale
Pasadena
Universal Studios Hollywood
The Getty
Topanga State Park
Malibu
Burbank
Inglewood
Hawthorne
Lynwood
Compton
Paramount
Bellflower
Norwalk
Whittier
Pico Rivera
Bell Gardens
Downey
Santa Fe Springs
Monterey Park
Montebello
Commerce
Vernon
Huntington Park
South Gate
El Segundo
Manhattan Beach
Lawndale
Gardena
Redondo
Lakewood
Cerritos
Buena Pa
La Mirada
Norwalk
Temple City
Alhambra
Rosemead
El Monte
Arcadia
Monrovia
Altadena
Kinneloa Mesa
Mt Wilson
La Crescenta-Montrose
La Cañada Flintridge
Brandeis
Bell Canyon
Hidden Hills
Calabasas
Topanga
Beverly
Santa Monica Mountains National Recreation...

Safety Connection Use Cases

Including the Geolocation of a Person in SOS Notifications

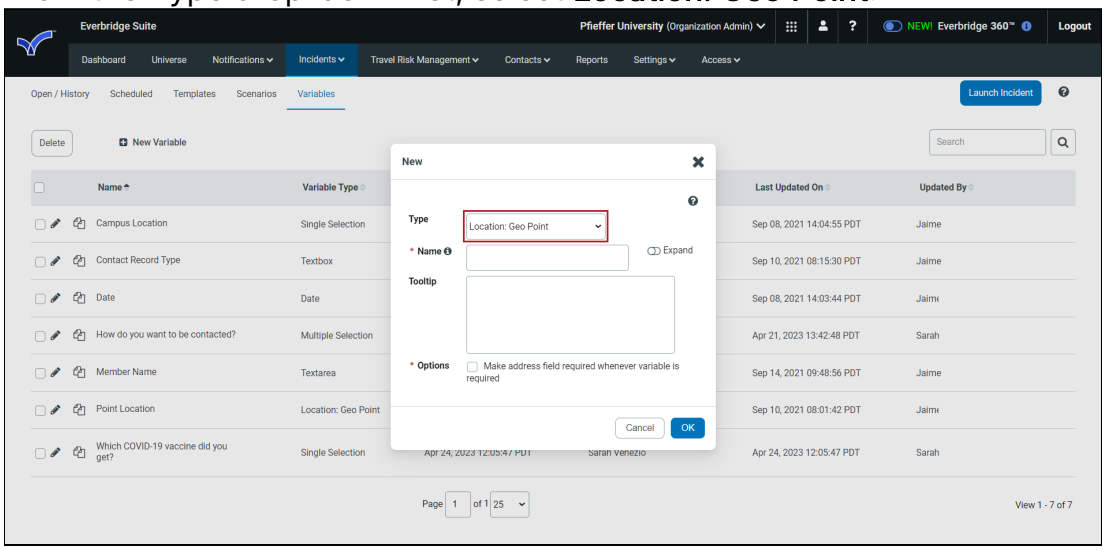
There are four major steps to include the geolocation of a person in SOS notifications. They are:

- Create a Variable
- Prepare the Incident Template
- Create an SOS Threshold
- Trigger the SOS Threshold

For details about SOS, see the *Using the Everbridge Mobile App* chapter of the *Interactive Visibility User Guide*.

Create a Variable

1. From the **Incidents** tab, select the **Variables** sub-tab.
2. Click **New Variable**.
3. Perform the following when the New dialog is displayed:
   a. From the Type drop-down list, select **Location: Geo Point**.

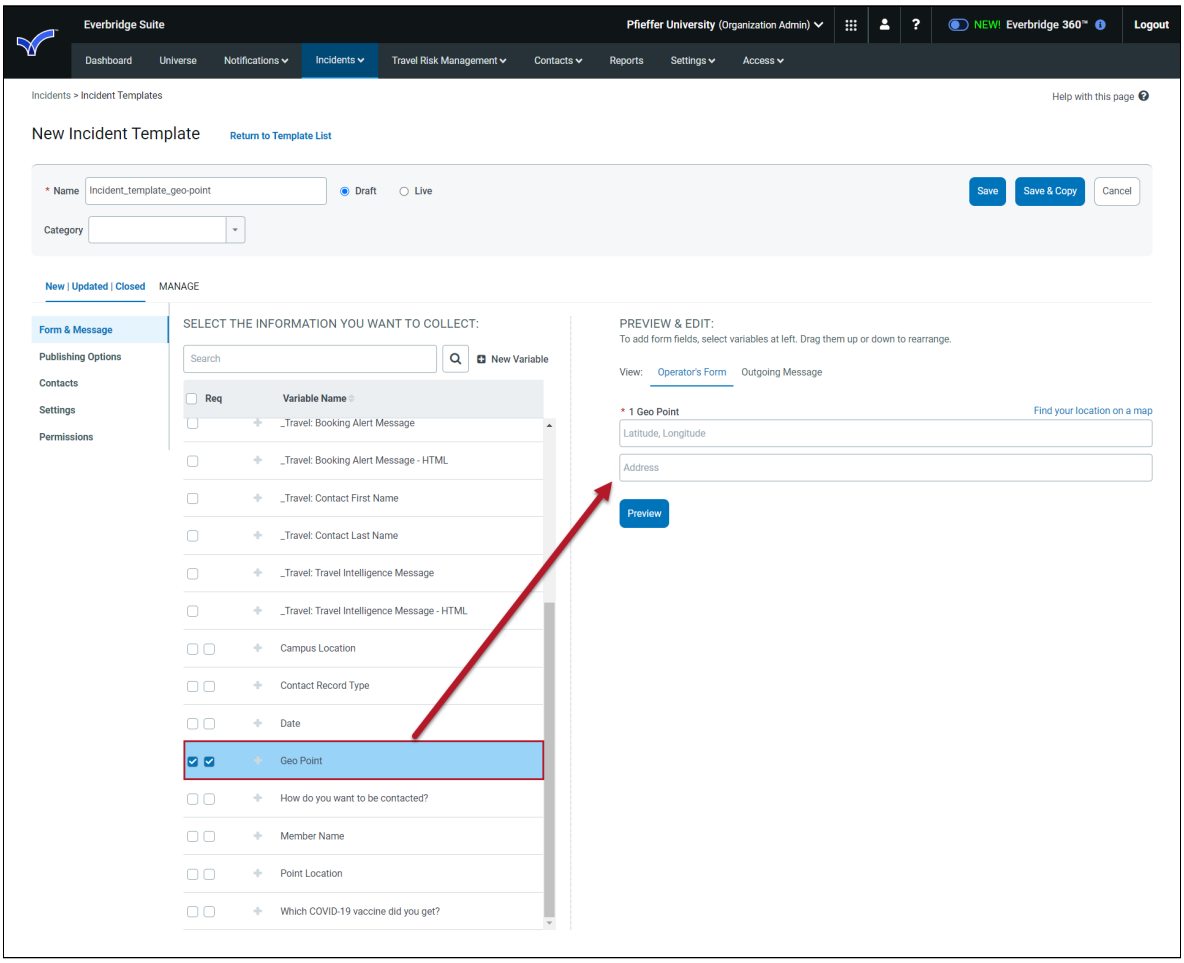


   b. Add a name, such as "Geo Point," and click **OK.**
4. Proceed to Prepare the Incident Template.

Prepare the Incident Template

1. From the **Incidents** tab, select the **Templates** sub-tab.
2. Click **New Incident Template**.

3. In the Name field, type **Incident_template_geo-point**. You can name your Incident template anything you want. It is named **Incident_template_geo-point** for the sake of this example.
4. From **Forms & Messages** (in the left-hand pane, select the **Geo Point** variable created above and observe the Operator's form in the right-hand panel.

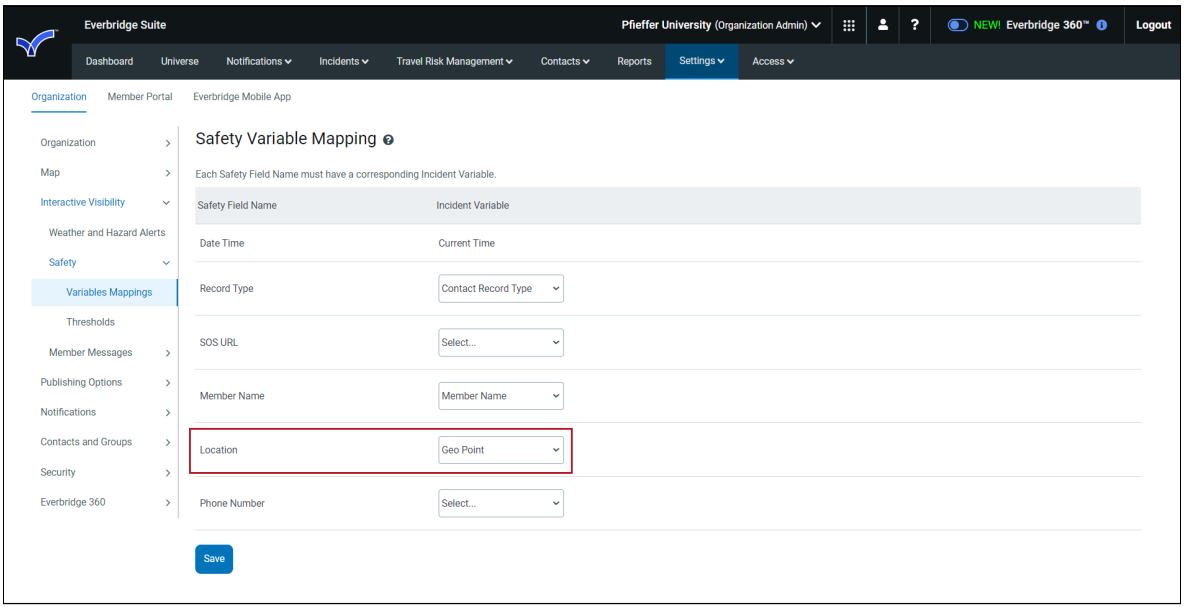


5. Select the Outgoing Message tab in the right-hand panel.
6. Input your information in the Text field. For example:
   - Input the Google Map link as follows: https://maps.google.com/maps/search/?api=1&query={geo-point}
   - Input the Bing Map link as follows: https://www.bing.com/maps?q={geo-point}
7. Enter other required information, as needed, such as Contacts.
8. Save the template.
9. Proceed to Create a Variable Mapping.

Create a Variable Mapping

1. From the **Settings** tab, select **Organization** > **Interactive Visibility** > **Safety** > **Variables Mappings**. The Safety Variable Mapping dialog is displayed.

2. In the **Safety Field Name: Location**, select the variable created above. In this example, “Geo Point” is used as the variable name.



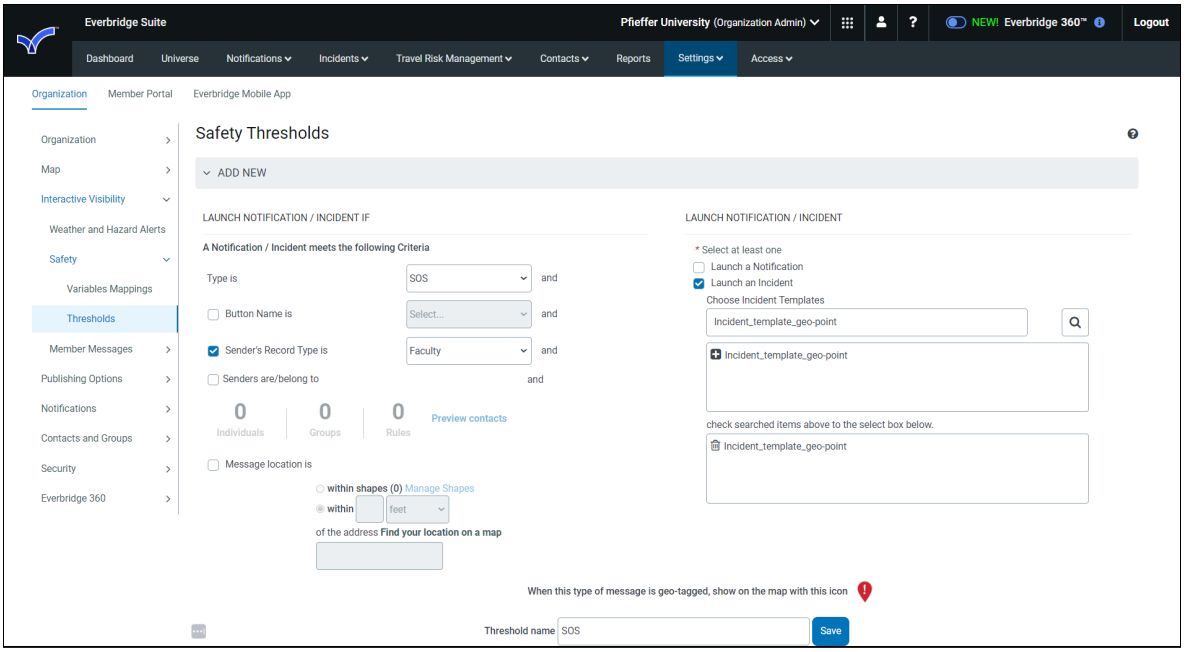
3. Click **Save**.
4. Proceed to Create an SOS Threshold.

Create an SOS Threshold

1. Select **Interactive Visibility** > **Safety** > **Thresholds**. The Safety Thresholds page is displayed.
2. From the **Launch Notification/Incident if** pane, the Type is: SOS and the Sender’s Record Type is Faculty, for example.

> **NOTE:** The geolocation of a person can also apply to Safe Corridor and Check-In scenarios (“Type is”).

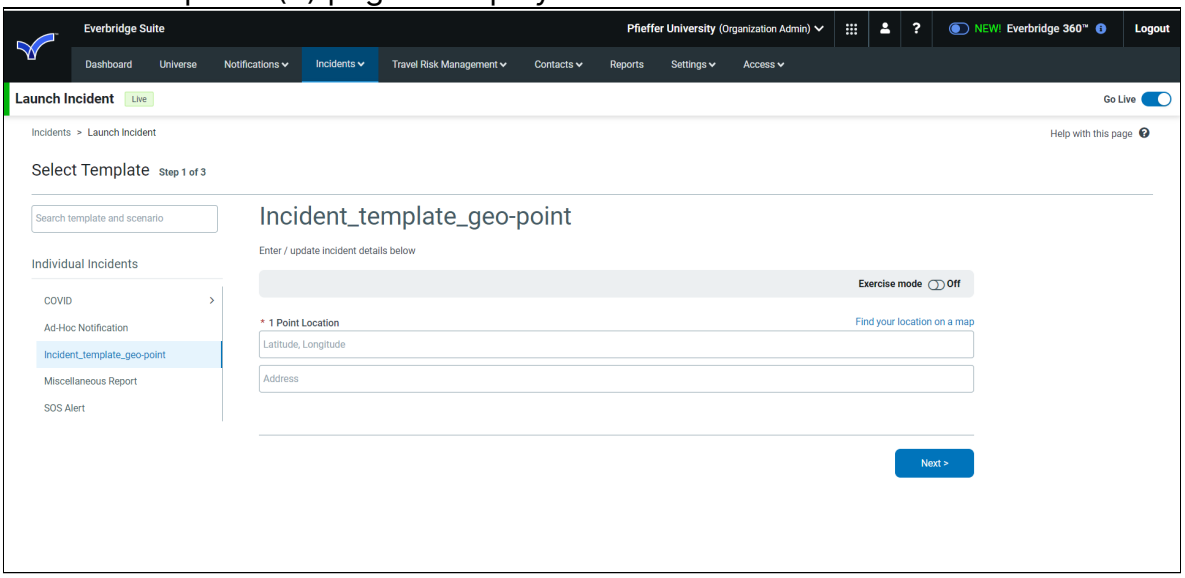
3. From the **Launch Notification/Incident** pane in the right-hand panel, select the checkbox: **Launch an Incident**.
4. From Choose Incident Templates, search for **Incident_template_geo-point**. Make sure to type the template name exactly as you named it in the procedure To prepare the Incident template earlier.
5. Type a Threshold Name in the text box and click **Save**.



6. Proceed To test the Incident template, next.

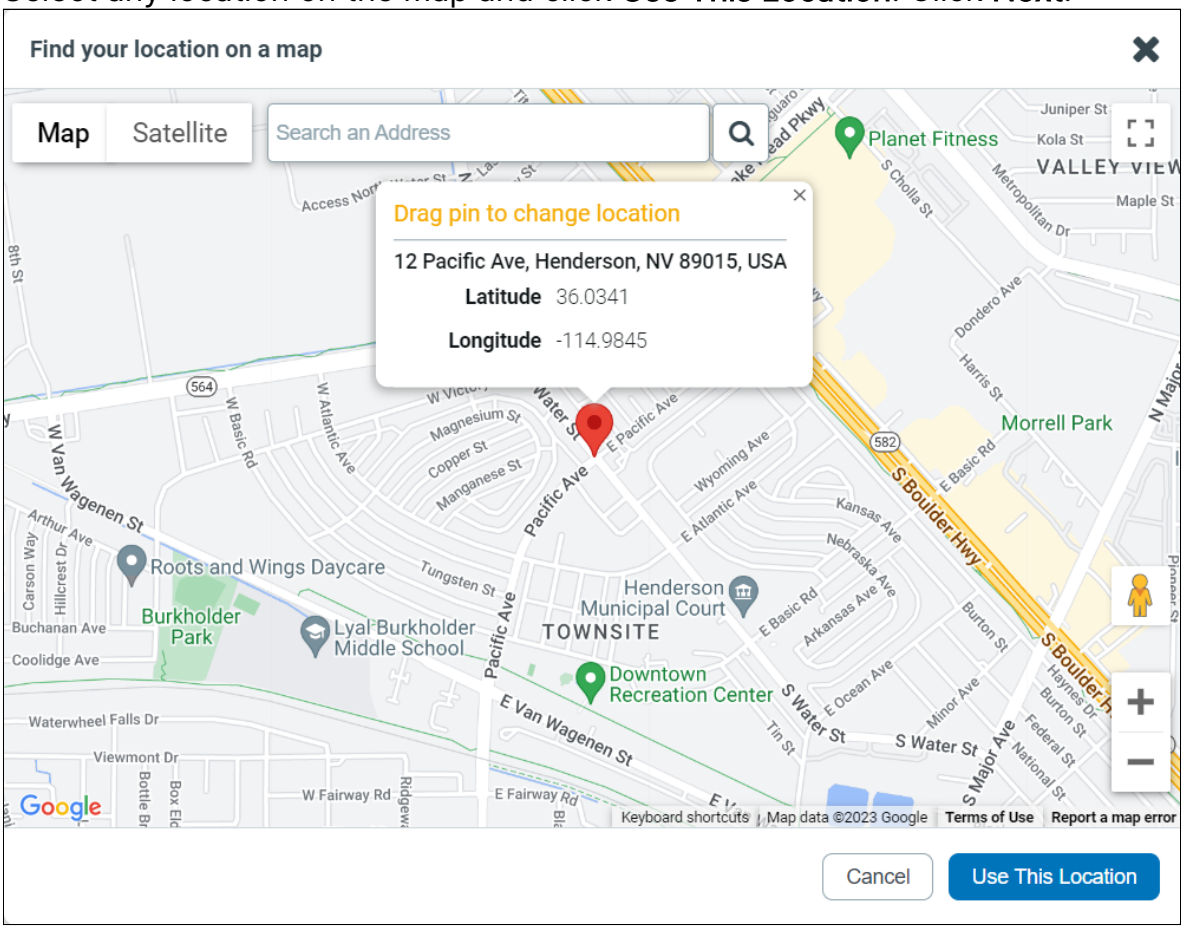
Testing the Incident Template

1. From the Incidents tab, select **Launch Incident**.
2. Under Individual Incidents, select **Incident_template_geo-point**. The Launch Incident Step 1 of (2) page is displayed.



3. Click **Find your location on a map**. When the Incident is manually launched, a location needs to be provided. If this Incident is triggered by the SOS Threshold, this property will be automatically filled with the location of the person initiating the SOS.

4. Select any location on the map and click **Use This Location**. Click **Next**.



5. If you haven't selected any select contacts, do so now.
6. Click **Send**.
7. From the **Incident Details** page, click the Title of the Incident. The Notification Details are displayed.
8. Click the link in the received email to see the location from the map.

Using the Everbridge Mobile App Custom Form Button

Custom Form buttons on the Everbridge Mobile App display a configurable questionnaire to the end user. Once submitted, an Incident is automatically triggered. The different steps to configure, use, and report on a Custom Form Button are described in this section:

- Create Incident variables that correspond to the questionnaire questions
- Create an Incident Template
- Set up the Custom Form Button
- Using the Custom Form Button
- Reporting on the Custom Form Button

For additional details about Everbridge Mobile App buttons, see the *Everbridge Mobile App User Guide*.

> **NOTE:** This feature is only available to Safety Connection Pro customers.

Create Incident Variables

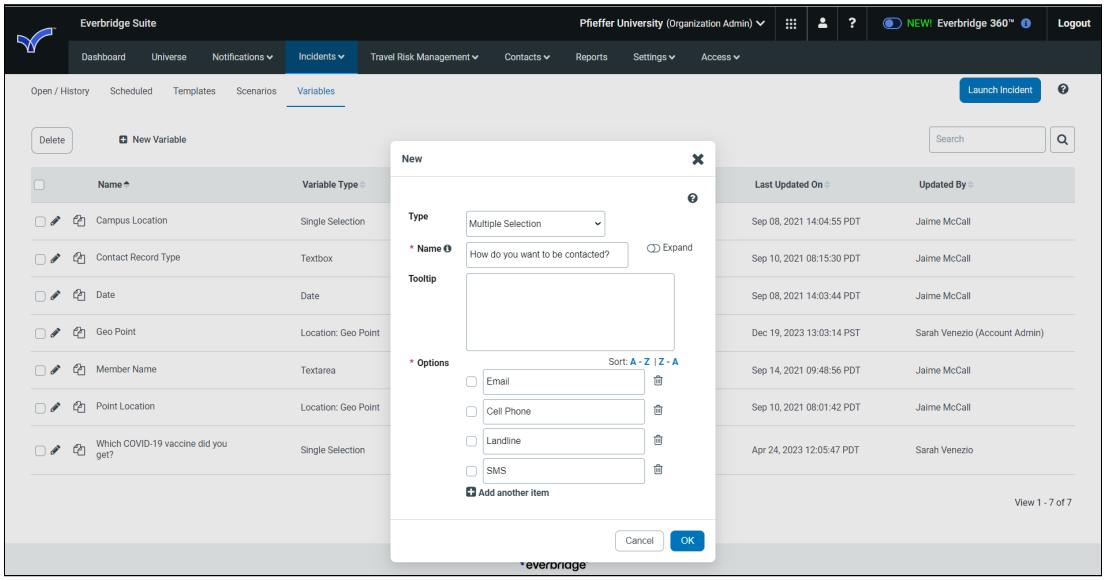
Each variable will represent a question in the questionnaire displayed on the Everbridge Mobile App. There is no limit to the number of variables that can be created for a questionnaire.

To create a variable:

1. From the Incidents tab, select the **Variables** subtab.
2. Click **New Variable**.
3. Perform the following when the New dialog is displayed.
    a. From the **Type** drop-down list, select any of the following types:
        - Single Selection
        - Multiple Selection
        - Textbox
        - Text Area
        - Date
    b. In the **Name** textbox, type the question that will be asked to the Everbridge Mobile App user. The expand switch can be used to expand the size of this textbox for questions that carry a long text. Questions are limited to 255 characters.

c. A tooltip can be entered and will be available on the Everbridge Mobile App.
d. Enter or select the options needed for the new variables and click **OK**.

4. Repeat the process above for each individual question. Incident variable types other than the ones mentioned above, such as Onshift Date Range, Location Geo Point, and so forth, are not supported.
   - If selected in the Incident template, they will not be displayed as questions on the Everbridge Mobile App.
   - If selected and made mandatory, Incidents will not be triggered.



For this use case, the following four variables (questions) are created:

Type	Name	Options
Single Selection	What do you want to report on?	Security issue Hazardous situation Equipment not working Incident involving individuals Other
Date	When did you first notice the issue?	N/A
textbox or TextArea	Please provide a short description of the issue.	N/A
Multi Selection	How do you want to be contacted?	Email Cell Phone

		Land Line SMS

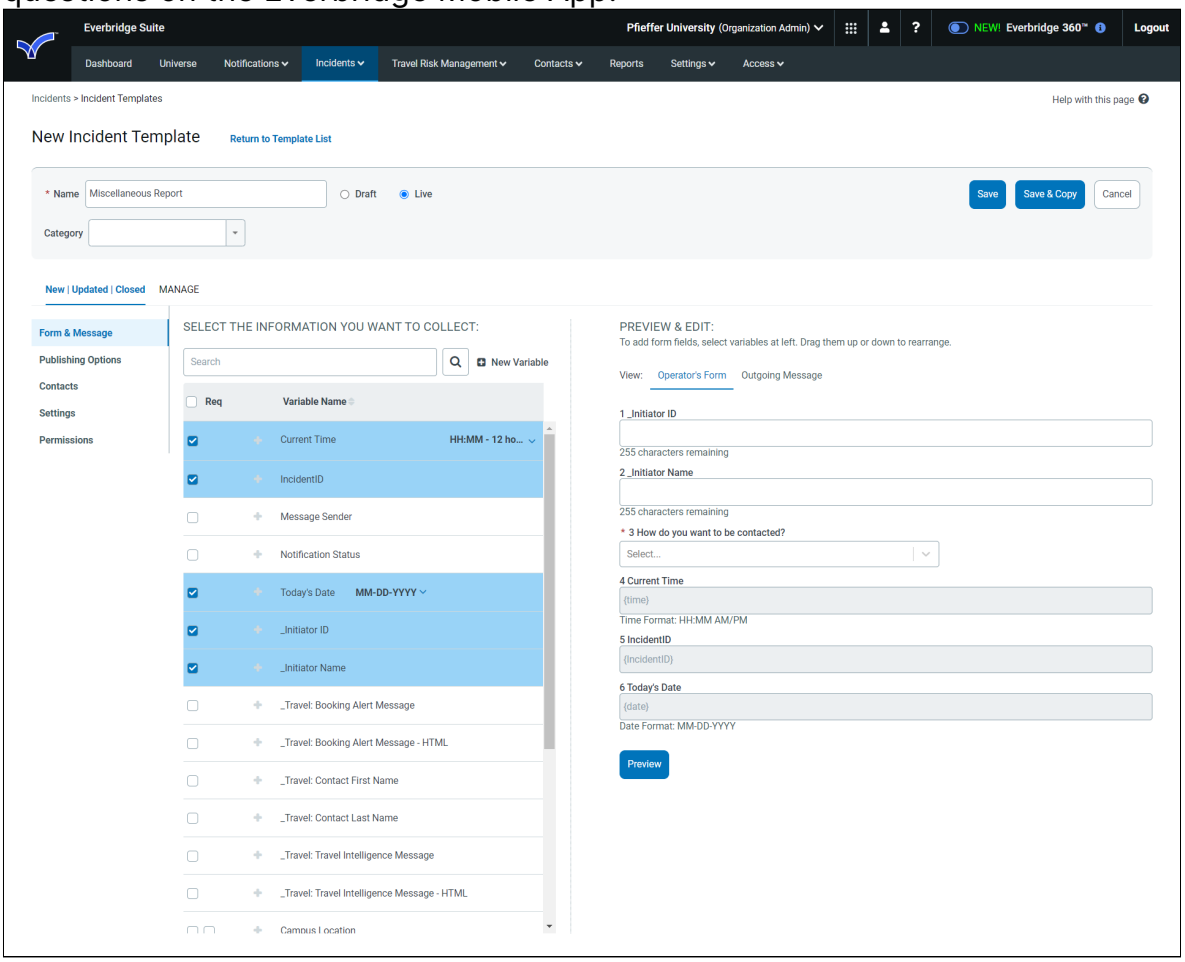
5. Proceed to Prepare the Incident Template.

Prepare the Incident Template

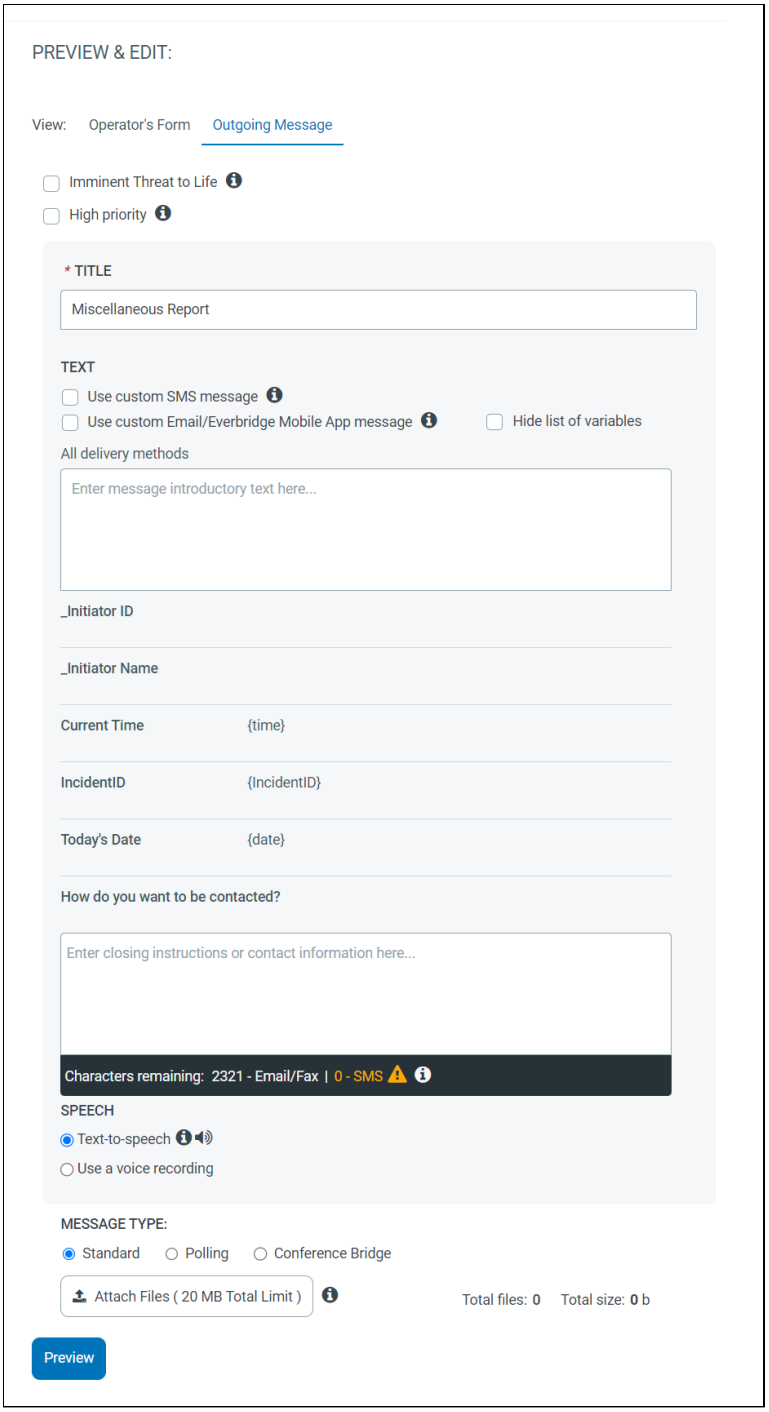
To create the Incident template:

1. From the Organization level, select **Incidents** > **Templates**.
2. Click **New Incident Template**.
3. In the Name field, type "Miscellaneous Report". You can name your Incident template anything you want. It is named **Miscellaneous Report** for the sake of this example.
4. Select the Incident variables corresponding to the questionnaire. Questions will appear in the order they have been selected. A preview is available on the right-hand side of the screen if View: Operator's form is selected. To change the order of the questions, deselect and reselect them in the desired order.
5. Select the two systems variables, ***_initiator ID*** and ***_initiator Name***, to capture the details of the user filling the questionnaire. These variables will be left empty if the Custom Form Button Anonymous Report option is selected. All other system variables can be added; system variables do not show as

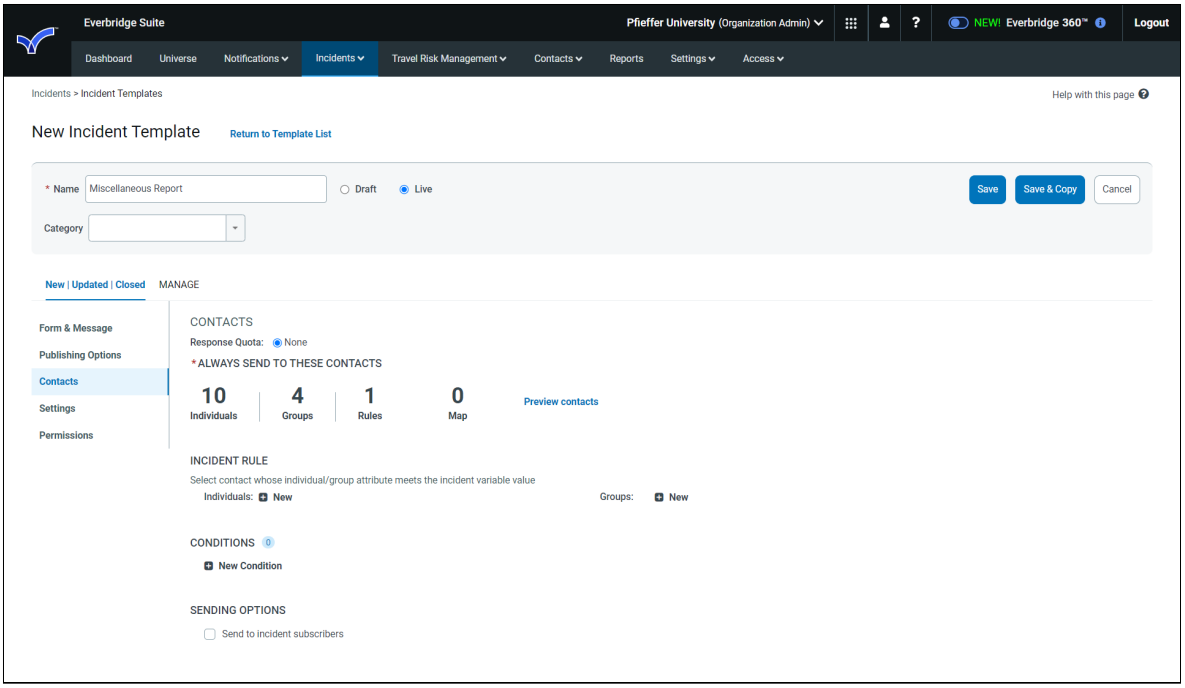
questions on the Everbridge Mobile App.



6. From the **Preview & Edit** pane, click **Outgoing Message** and build the message using the variables. Variables can be added to the message title or body by clicking the **+** button to the left of each variable name.

7. 

8. Select the contact(s) that will receive the Notification.



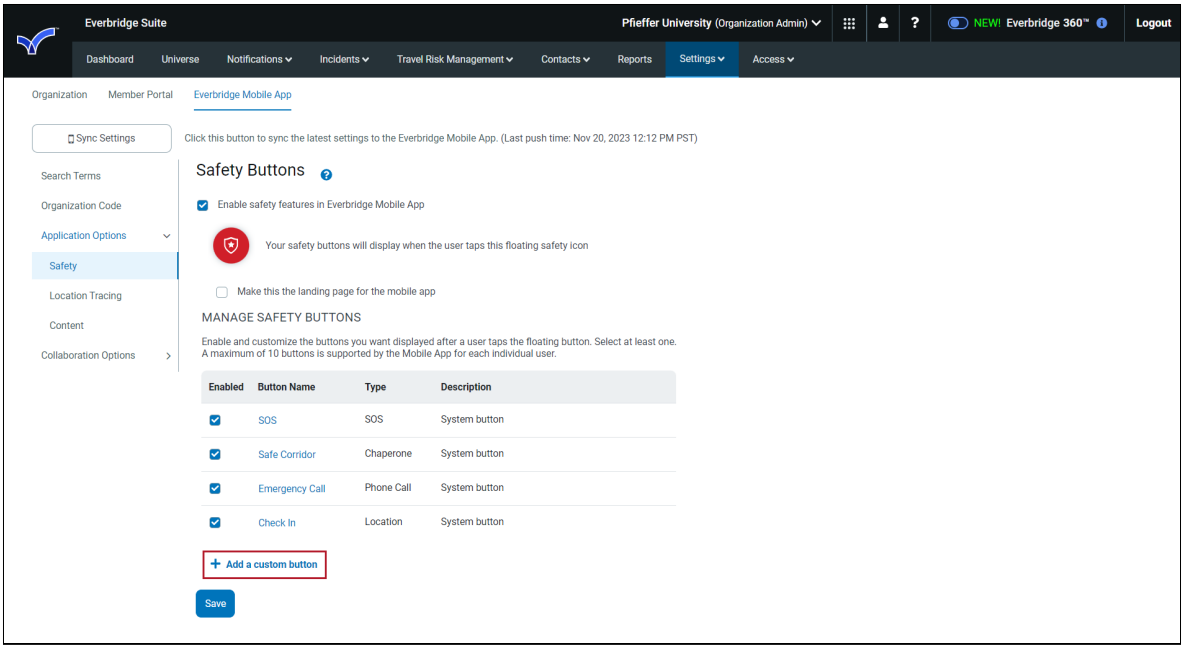
The Conditions section of the Contacts tab can be used to send the Notification attached to the Incident to different sets of contacts based on answers to the questionnaire represented by Incident variable values.

9. Set the template status to **Live**.
10. Save the template.
11. Proceed to Set Up a Custom Form Button.

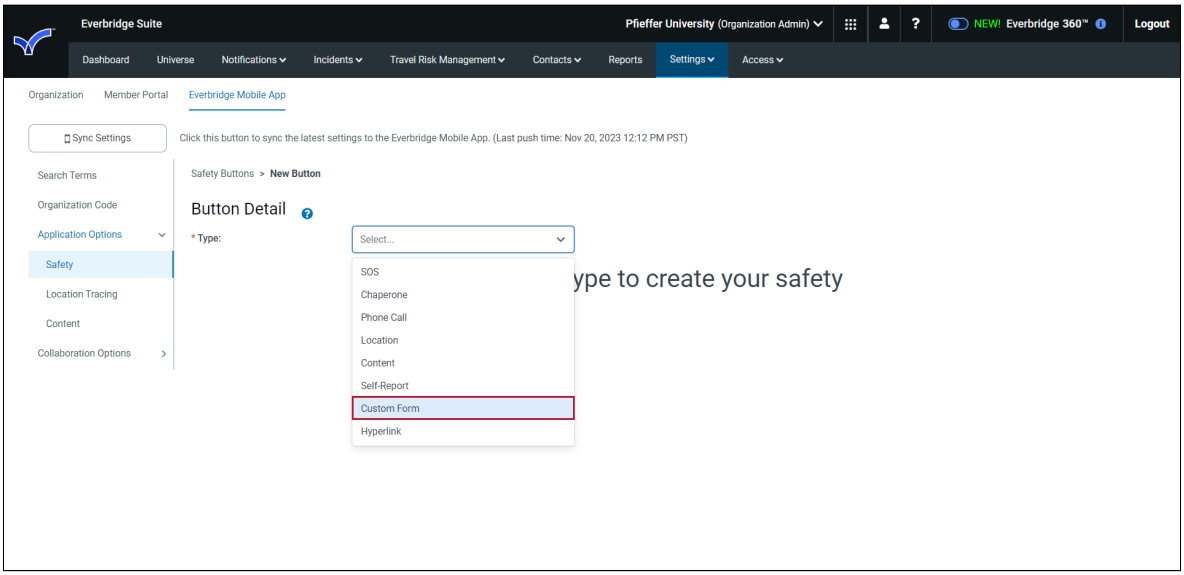
Set Up a Custom Form Button

To set up a Custom Form Button

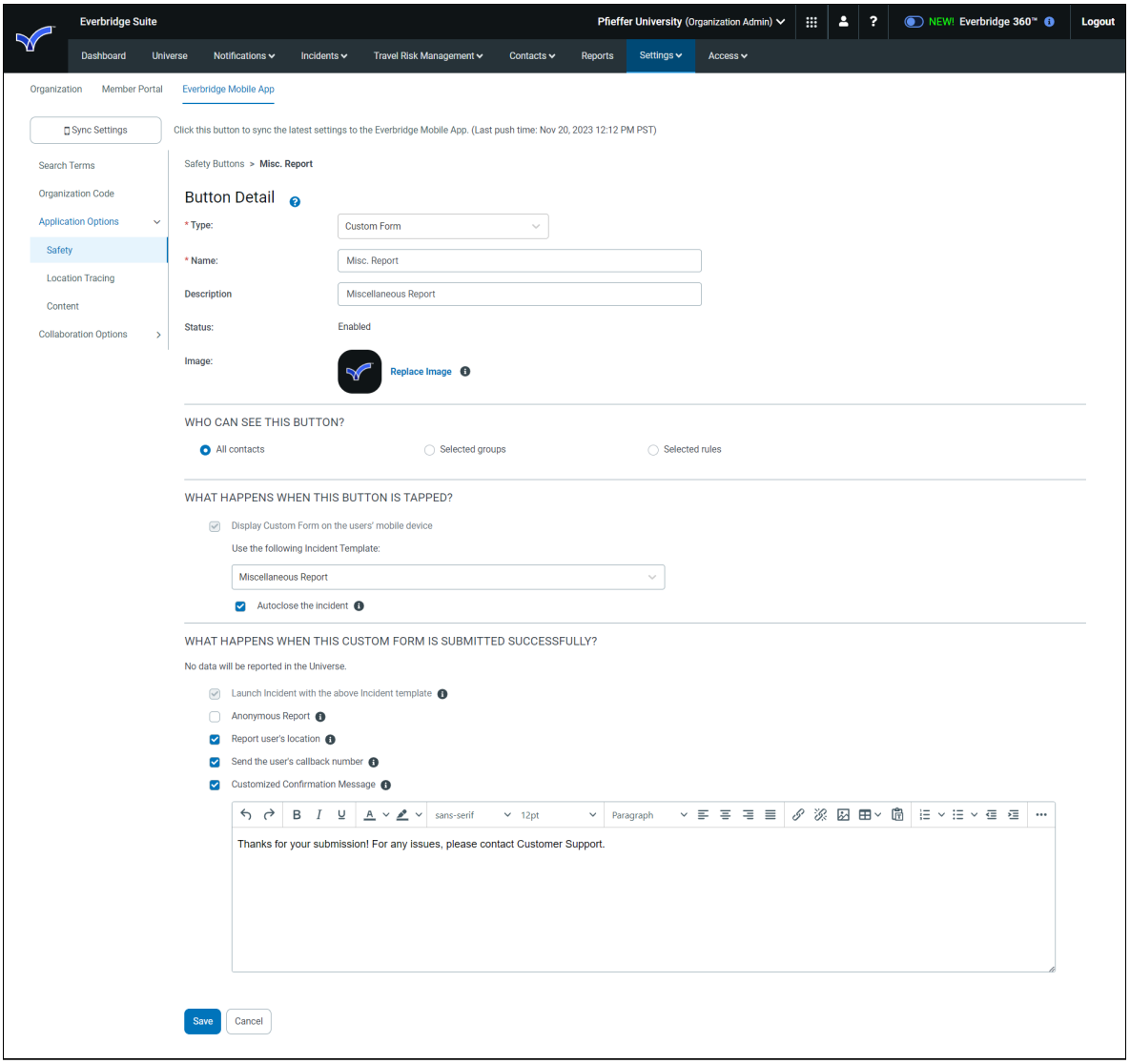
1. From the Settings tab, select **Everbridge Mobile App** > **Application Options** > **Safety**. The list of all available buttons is displayed. If none are visible, select the checkbox: Enable Safety features in Everbridge Mobile App.
2. At the bottom of the button list, click **Add a Custom Button**.



3. Select **Custom Form** from the Type list.



4. Enter a name and a description for the button. An icon can be uploaded; the recommended size for an Everbridge Mobile App icon is **256x256 pixels**. Access to the button can be controlled in the Who Can See This Button? section. The recommendation is to limit access to a small number of users while the button is created and tested. Once the validation is done, the button can be made available to all relevant users.
5. Select the template to use for that custom button. In this example, the **Miscellaneous Report**.
6. Indicate if the Incident should be closed immediately after sending the Notification by selecting or clearing the checkbox: **Auto-close the Incident**.



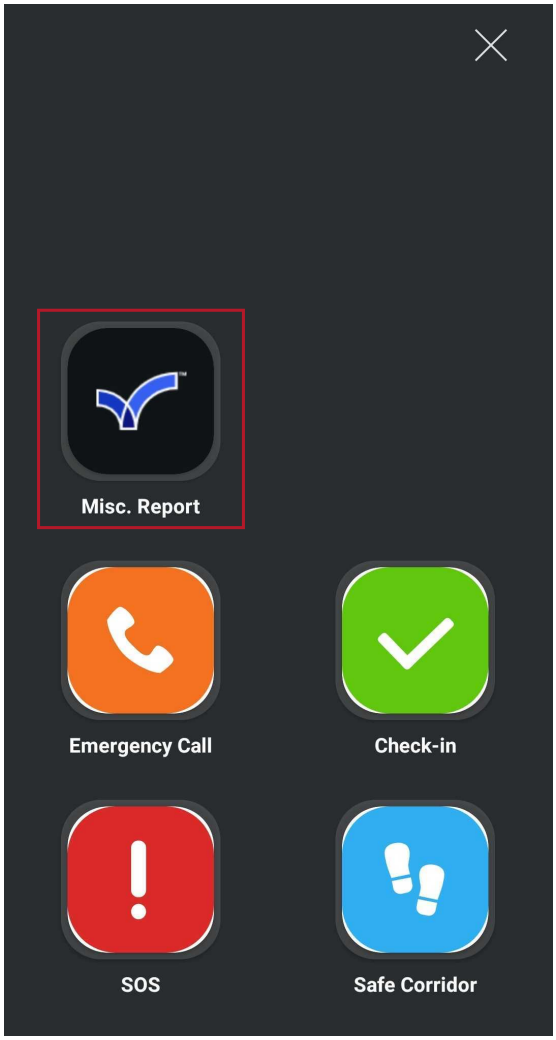
NOTE: Make sure your Incident Template is set with the status **Live**. Draft Incident Templates do not appear in the drop-down list.

If the Anonymous Report option is selected, the custom form questionnaire will always be anonymous; that is, the name of the user submitting it will never be exposed in Everbridge Suite.

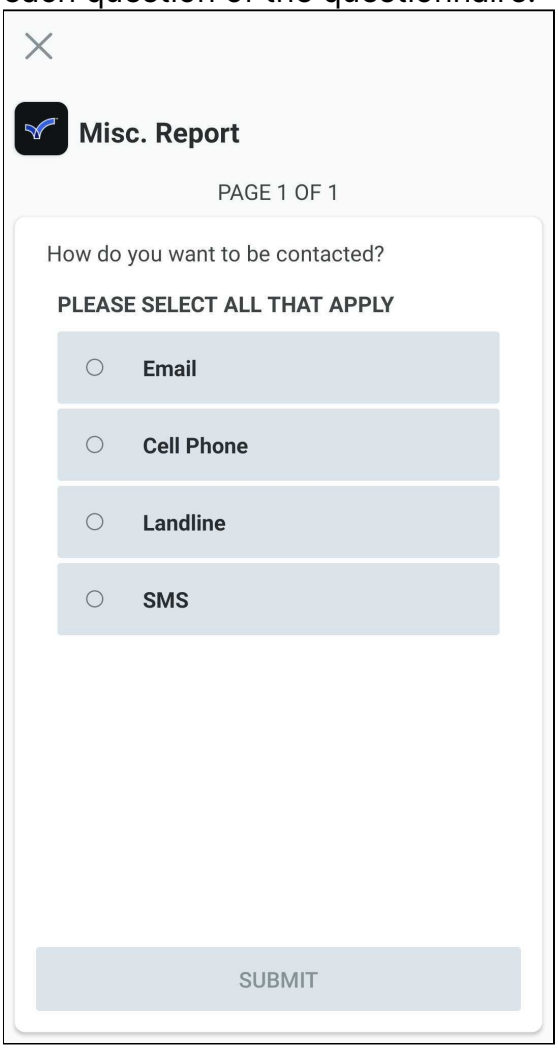
7. The **Report user's location** and **Send the user callback number** checkboxes can be used to capture the geocoordinates of the device when the button is used as well as the associated callback number. These values will only be exposed in the Custom Form quick report.
8. Once the questionnaire has been submitted, a message can be displayed to the end user using the Customized Confirmation message option.
9. Once set up, the new button will be displayed in the Everbridge Mobile App.

Using the Custom Form Button

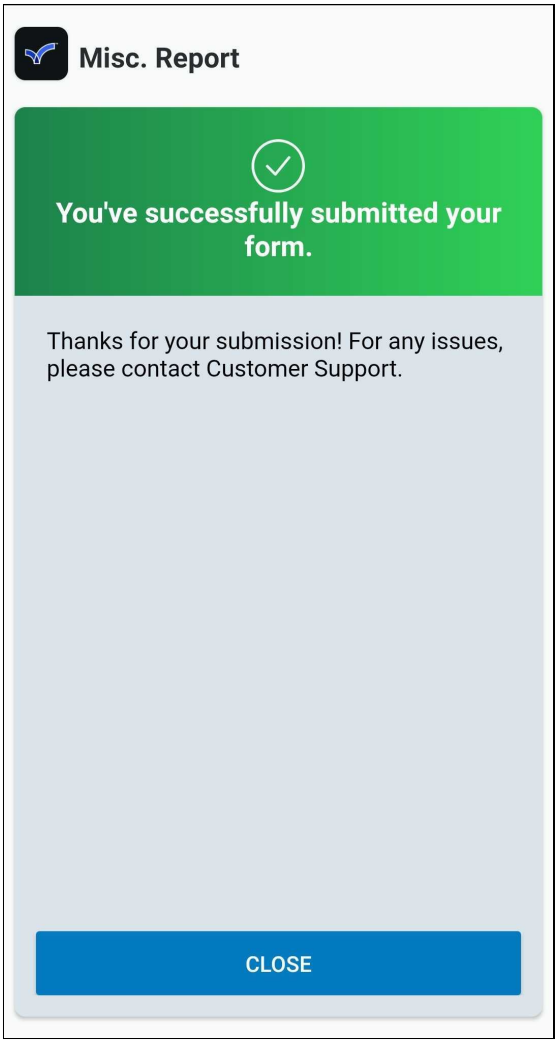
1. From a mobile device installed with the Everbridge Mobile App, tap the **Safety** icon at the bottom of the page.



2. Tap the **New Custom Form Button** (in this example, **Misc. Report**) and reply to each question of the questionnaire.



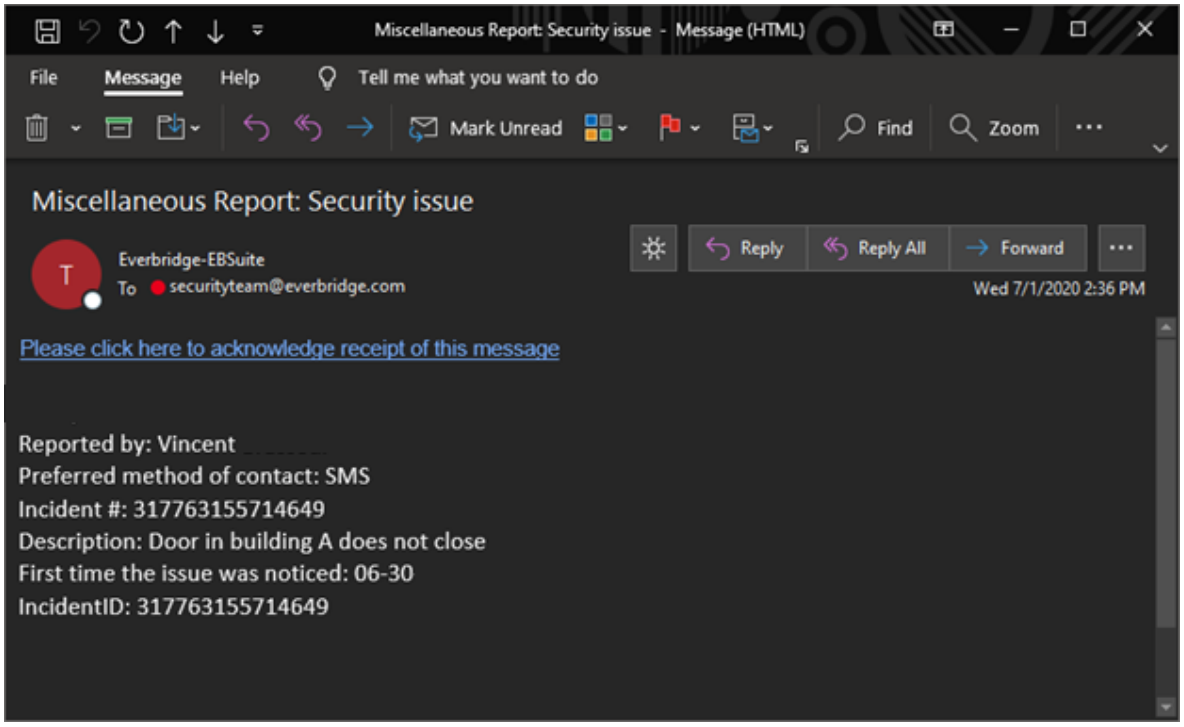
3. Validate the questionnaire.



NOTE: The text beneath the green banner is the Customized Confirmation Message that was set on the Custom Form Button page.

4. Once validated, an Incident will be generated using the Incident Template attached to the custom button. In this example, an email message is received

each time the button is used.



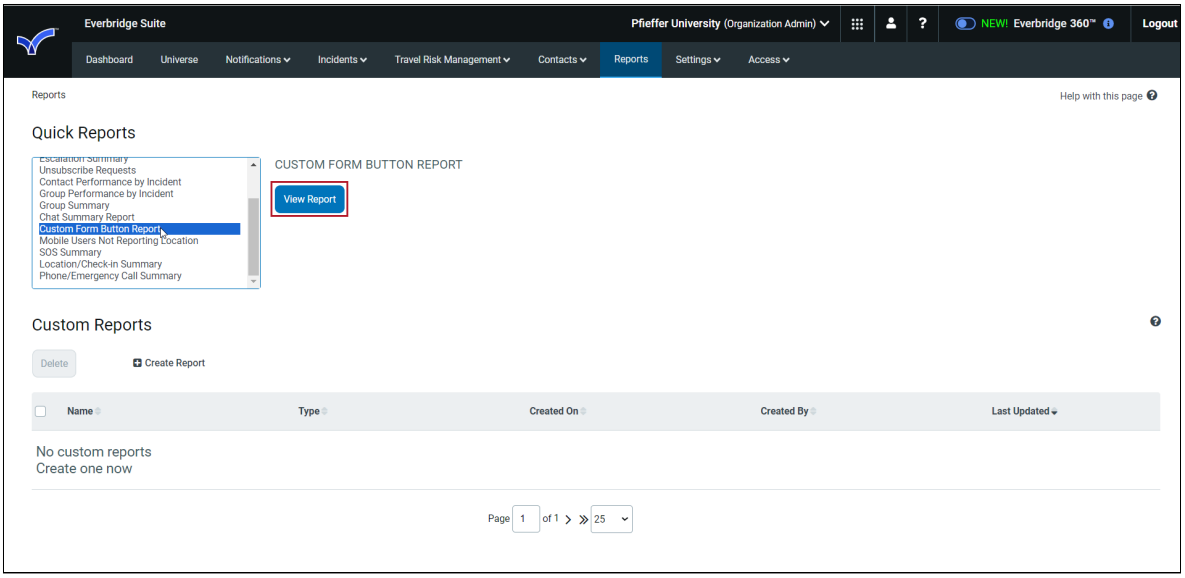
Reporting on the Custom Form Buttons

Using the Custom Form Button Quick Report

You can view a chart and download the list of all your contacts that have used the Everbridge Mobile App Custom Form buttons for a specific period.

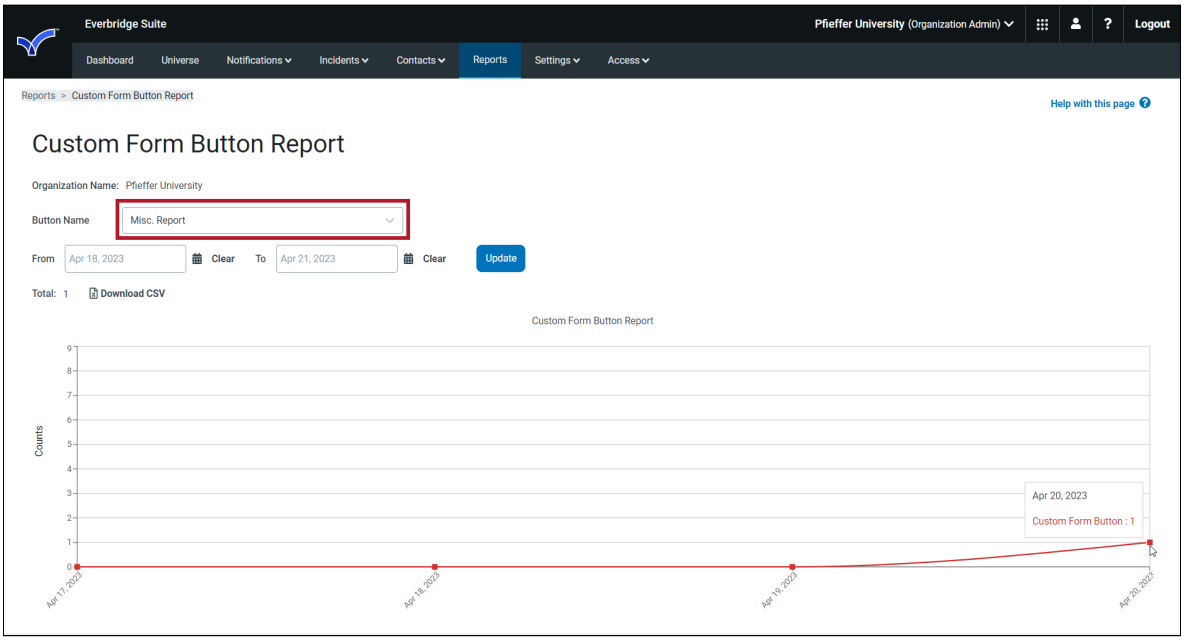
To use the Custom Form Button Quick Report:

1. From the Organization level, click **Reports**.
2. Select the **Custom Form Button Report** from the list of **Quick Reports**.
3. Click **View Report**. The report criteria are displayed.



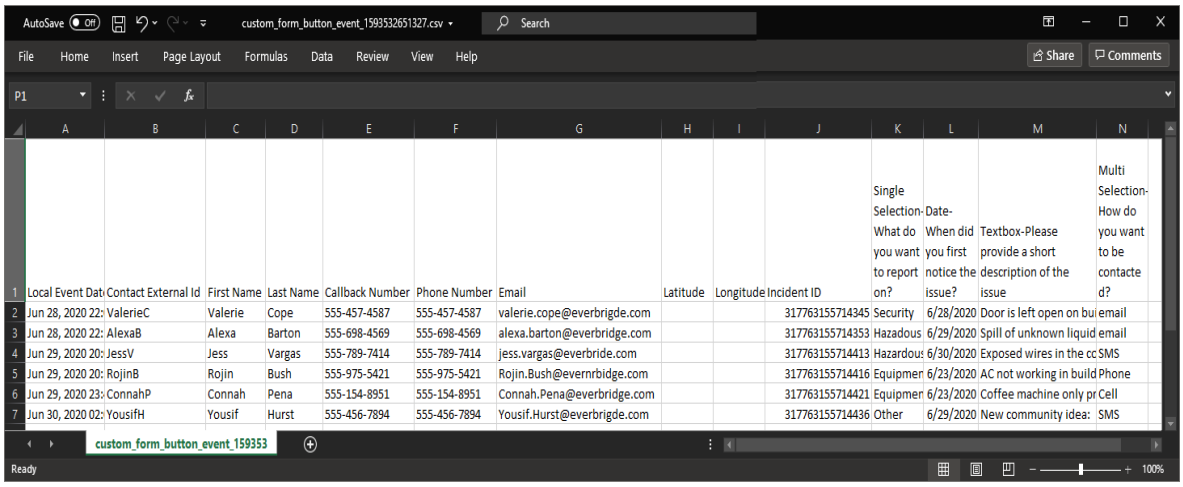
4. Select the Custom Form Button Name from the drop-down list.

5. Select a time frame. By default, the period selected is 14 days ending on the current date. Start and end dates can be adjusted to a different time frame. Once selected, click **Update** to refresh the chart.
6. The chart displays the number of actions from the Everbridge Mobile App on a day-by-day basis for the selected Custom Form Button. Positioning the cursor on each data point shows the date and the corresponding value.



7. The detailed data corresponding to the charts can be downloaded as a CSV file. Click **Download CSV** to generate and download the file.

Once downloaded, the file can be viewed in Excel. Each question from the questionnaire attached to the Custom Form button is shown as a column; answers provided by each end user are displayed in the corresponding rows.

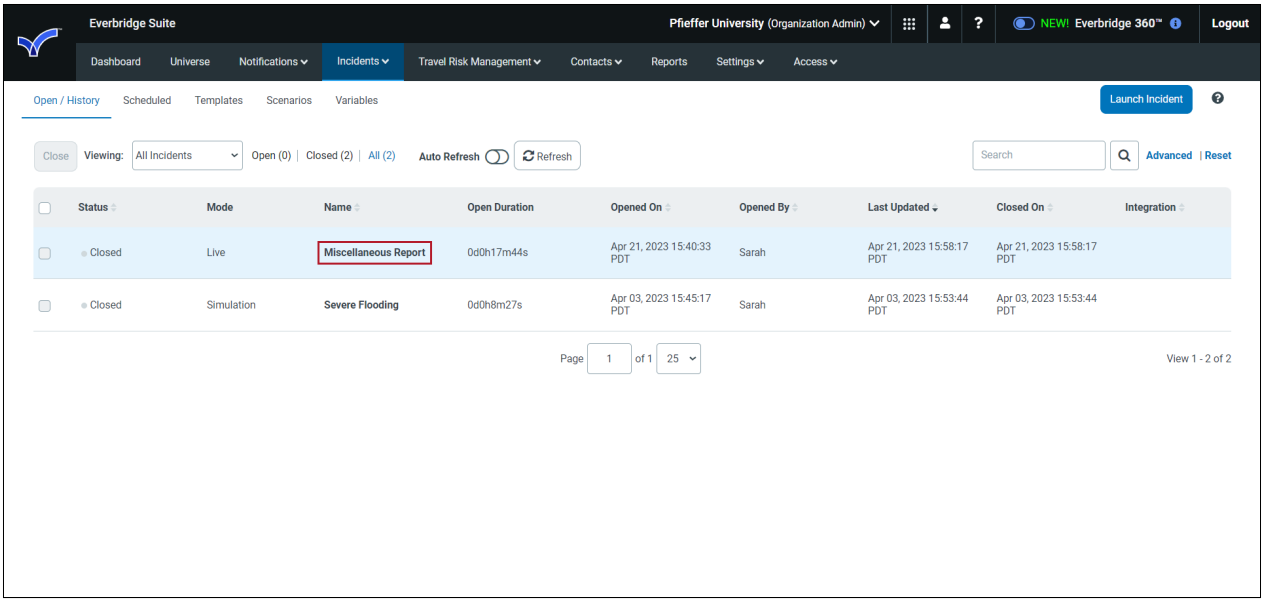


	Local Event Dat	Contact External Id	First Name	Last Name	Callback Number	Phone Number	Email	Latitude	Longitude	Incident ID	Single Selection-What do you want to report on?	Date-When did you first notice the issue?	Textbox-Please provide a short description of the issue	Multi Selection-How do you want to be contacted?
2	Jun 28, 2020 22:	ValerieC	Valerie	Cope	555-457-4587	555-457-4587	valerie.cope@everbrigde.com			317763155714345	Security	6/28/2020	Door is left open on bui	email
3	Jun 28, 2020 22:	AlexaB	Alexa	Barton	555-698-4569	555-698-4569	alexa.barton@everbridge.com			317763155714353	Hazadous	6/29/2020	Spill of unknown liquid	email
4	Jun 29, 2020 20:	JessV	Jess	Vargas	555-789-7414	555-789-7414	jess.vargas@everbride.com			317763155714413	Hazardous	6/30/2020	Exposed wires in the cc	SMS
5	Jun 29, 2020 20:	RojinB	Rojin	Bush	555-975-5421	555-975-5421	Rojin.Bush@evernrbidge.com			317763155714416	Equipmen	6/23/2020	AC not working in build	Phone
6	Jun 29, 2020 23:	ConnahP	Connah	Pena	555-154-8951	555-154-8951	Connah.Pena@everbridge.com			317763155714421	Equipmen	6/23/2020	Coffee machine only pr	Cell
7	Jun 30, 2020 02:	YousifH	Yousif	Hurst	555-456-7894	555-456-7894	Yousif.Hurst@everbrigde.com			317763155714436	Other	6/29/2020	New community idea:	SMS

> **NOTE:** The end user details will not be displayed if the report has been set to "anonymous". In that case, the callback number and geolocation will not be displayed as well. The callback number and geolocation may appear empty if the corresponding options have not been set on the Custom Form Button.

Incidents

You can view the list of all Incidents triggered by the Custom Form Button from the Organization level in **Incidents** > **Open/History**.


Everbridge Suite
Pfieffer University (Organization Admin)
NEW! Everbridge 360™
Logout
Dashboard
Universe
Notifications
Incidents
Travel Risk Management
Contacts
Reports
Settings
Access
Open / History
Scheduled
Templates
Scenarios
Variables
Launch Incident
Close
Viewing:
All Incidents
Open (0) | Closed (2) | All (2)
Auto Refresh
Refresh
Search
Advanced | Reset
Status
Mode
Name
Open Duration
Opened On
Opened By
Last Updated
Closed On
Integration
Closed
Live
Miscellaneous Report
0d0h17m44s
Apr 21, 2023 15:40:33 PDT
Sarah
Apr 21, 2023 15:58:17 PDT
Apr 21, 2023 15:58:17 PDT
Closed
Simulation
Severe Flooding
0d0h8m27s
Apr 03, 2023 15:45:17 PDT
Sarah
Apr 03, 2023 15:53:44 PDT
Apr 03, 2023 15:53:44 PDT
Page 1 of 1 25
View 1 - 2 of 2

Using the Everbridge Mobile App Self-Report Button

Self-Report buttons on the Everbridge Mobile App enable an end user to report positive for COVID-19 to their Organization. These buttons can optionally trigger proximity events. Multiple Self-Report buttons can be created for different groups of users. A Self-Report Button displays a configurable questionnaire to the recipient on the Everbridge Mobile App. Once submitted:

- An Incident is automatically triggered.
- Optionally, proximity events can be triggered. The different steps to configure, use, and report on a Self-Report Button are described in this section:
- Create Incident variables that correspond to the questionnaire questions
- Create an Incident Template
- Set up a Self-Report Button
- Using a Self-Report Button
- Configuring Proximity Events
- Reporting on Self-Report Buttons

For additional details about the Everbridge Mobile App buttons, see the *Everbridge Mobile App User Guide*.

> **NOTE:** This feature is only available to Safety Connection Pro customers.

Create Incident Variables

Each variable will represent a question in the questionnaire displayed on the Everbridge Mobile App. There is no limit to the number of variables that can be created for a questionnaire.

To create a variable:

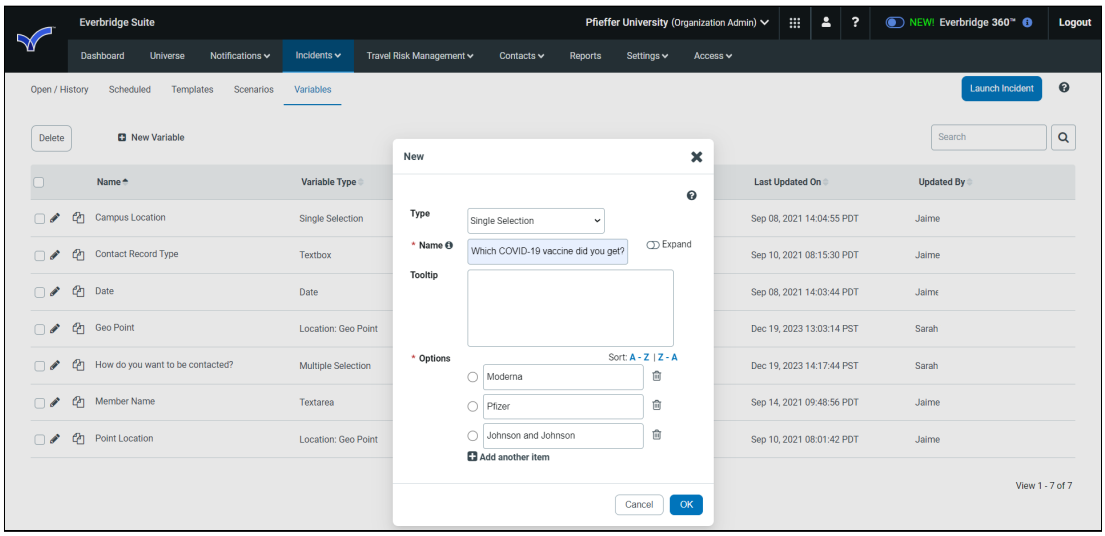
1. From the Incidents tab, select the **Variables** sub-tab.
2. Click **New Variable**.
3. Perform the following when the New dialog is displayed.
    a. From the Type drop-down list, select any of the following types:
        - Single Selection
        - Multiple Selection
        - Text Box
        - Text Area
        - Date
    b. In the **Name** text box, type the question that will be asked to the Everbridge Mobile App user. The **Expand** switch can be used to expand

the size of this text box for questions that carry a long text. Questions are limited to 255 characters.

c. A tooltip can be entered and will be available on the Everbridge Mobile App.

d. Enter or select the options needed for the new variables and click **OK**.

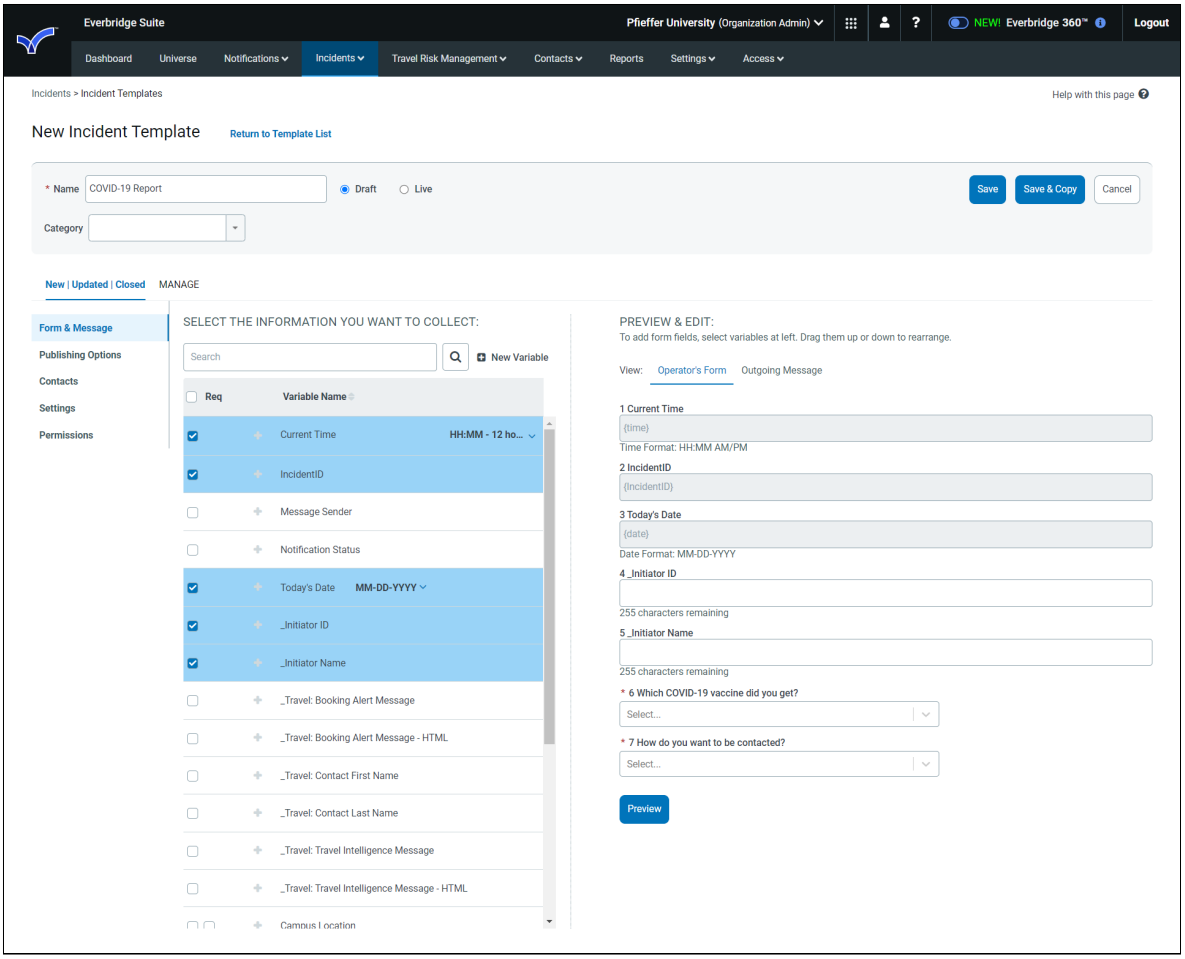
4. Repeat the process above for each question. Incident variable types other than those mentioned above, such as Onshift Date Range, Location Geo Point, etc., are not supported.
   - If selected in the Incident template, they will not be displayed as questions on the Everbridge Mobile App.
   - If selected and made mandatory, Incidents will not be triggered.



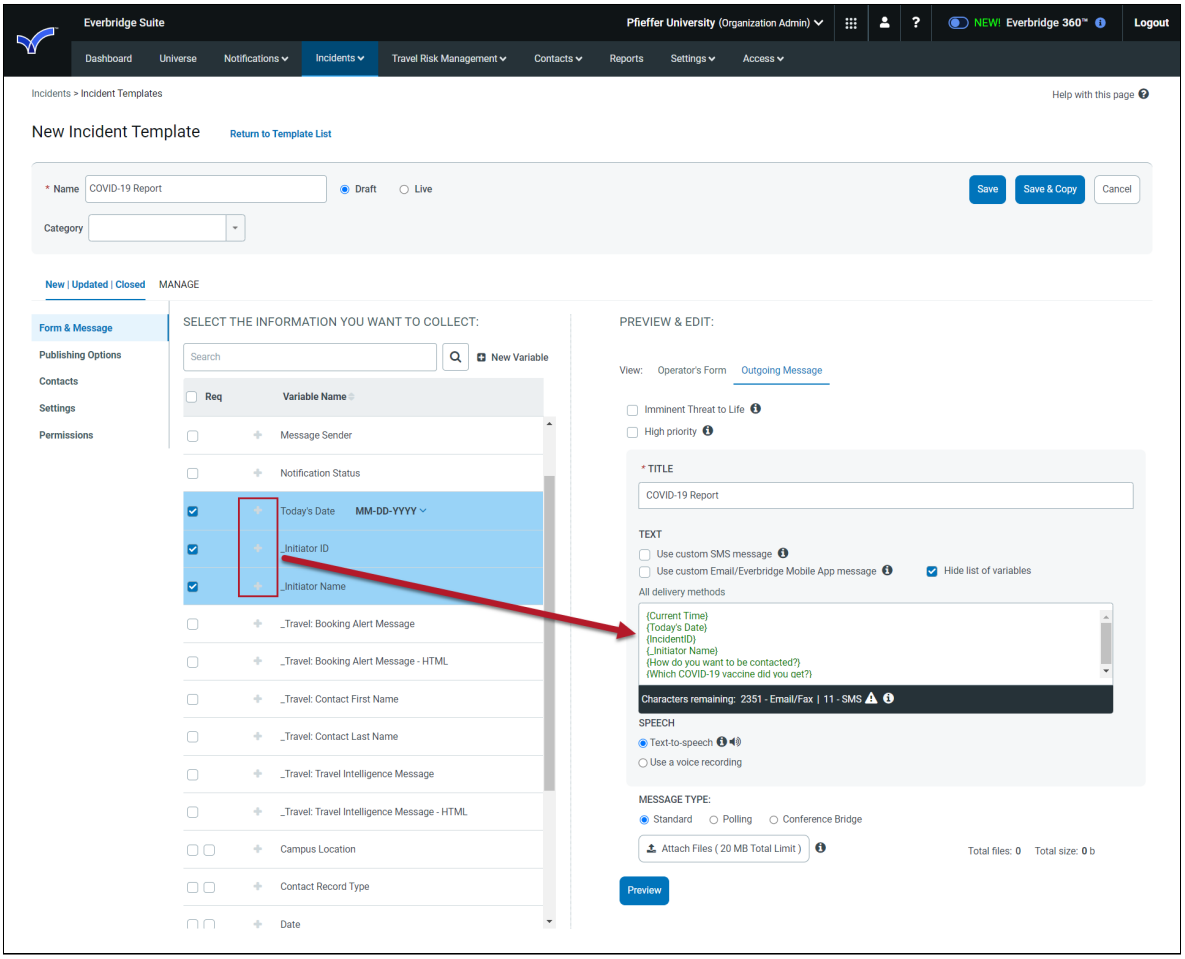
5. Proceed to Prepare the Incident Template.

Prepare the Incident Template

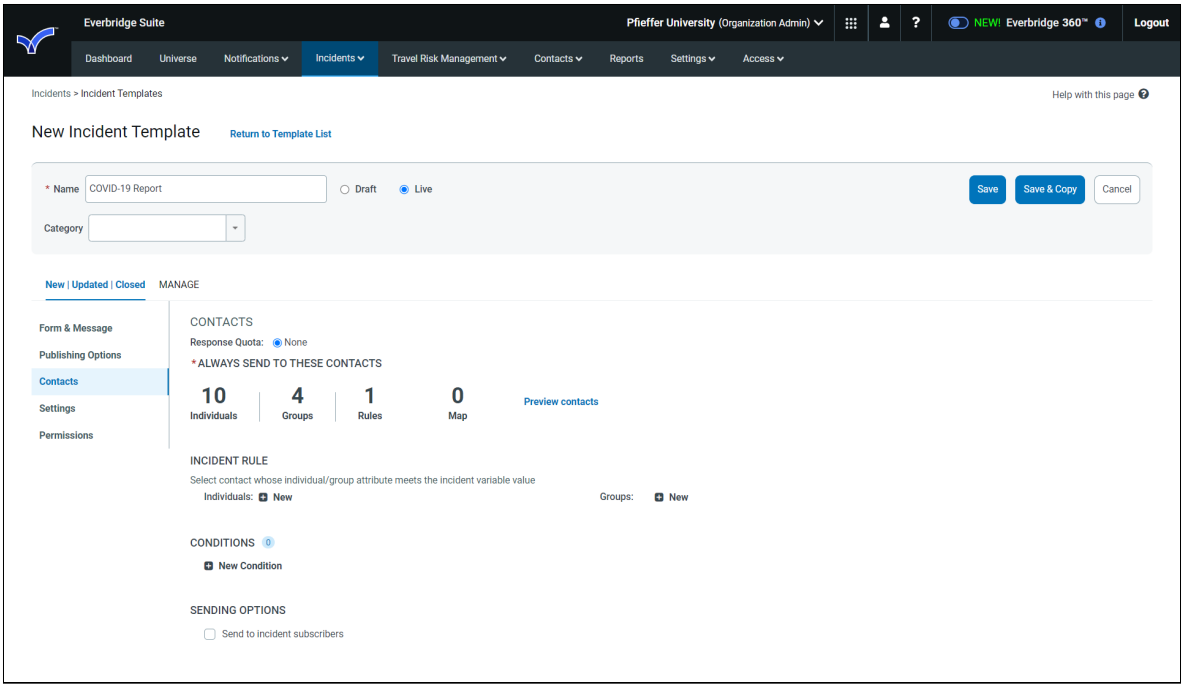
1. From the Organization level, select **Incidents** > **Templates**.
2. Click **New Incident Template**.
3. In the Name field, type **COVID-19 Report.** You can name your Incident template anything you want. It is named **COVID-19 Report** for the sake of this example.
4. Select the Incident variables corresponding to the questionnaire. Questions will appear in the order they have been selected. A preview is available on the right-hand side of the screen if View: Operator's form is selected. To change the order of the questions, deselect and reselect them in the desired order.
5. Select the two systems variables, ***_initiator ID*** and ***_initiator Name***, to capture the details of the user filling out the questionnaire. These variables will be left empty if Everbridge Suite is configured for "anonymous" Self-Report. All other system variables can be added; system variables do not show as questions on the Everbridge Mobile App.



6. From the **Preview & Edit** pane, click **Outgoing Message** and build the message using the variables. Variables can be added to the message title or body by first clicking on the message text field, and then on the **+** button to the left of each variable you'd like to add to it.



7. Set the contact(s) that will receive the Notification by specifying Individuals, Groups, and Rules, or by utilizing the Map.



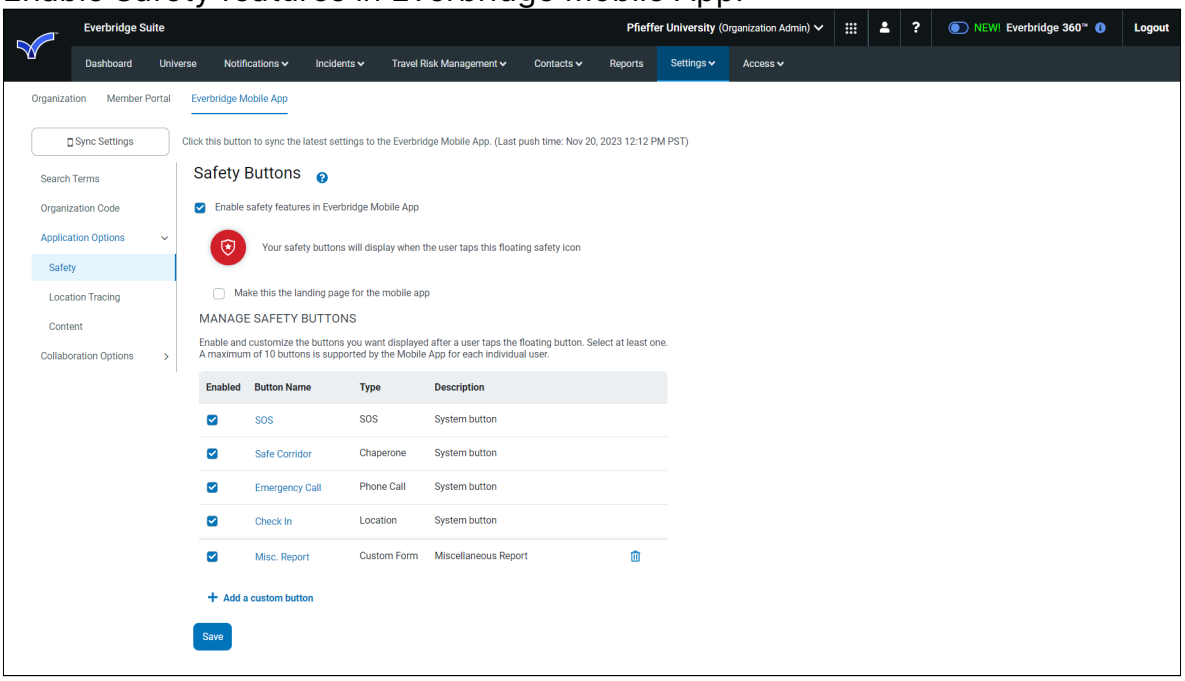
NOTE: Setting the Self-Report as anonymous or non-anonymous can only be done by Everbridge at the Organization level. This value is set during the implementation and is not supposed to be changed. Contact Everbridge Support if you have questions.

8. Set the template status to **Live**.
9. Save the template.
10. Proceed to Set Up a Self-Report Button.

Set Up a Self-Report Button

1. This is exclusively for customers using **Contact Tracing**. From the **Settings** tab, select **Everbridge Mobile App** > **Application Options** > **Safety**. The list of all available buttons is displayed. If none are visible, select the check box

Enable Safety features in Everbridge Mobile App.



2. At the bottom of the button list, click **Add a Custom Button**.
3. From the New Button page, Select **Self-Report** from the drop-down list.
4. Enter a name and a description for the button. An icon can be uploaded; the recommended size for the Everbridge Mobile App icon is **256x256 pixels**. Access to the button can be controlled in the Who Can See This Buttons? section. The recommendation is to limit access to a small number of users while the button is created and tested. Once the validation is done, the button can be made available to all relevant users.
5. Select the template to use for that custom button. In this example, it is **COVID-19 Report**.
6. Indicate if the Incident should be closed immediately after sending the Notification by selecting or clearing the checkbox: **Auto-close the Incident**.

> **NOTE:** Make sure your Incident Template is set with the status Live. Draft Incident Templates do not appear in the drop-down list.

7. If the Self-Report is configured as "anonymous" in Everbridge Suite, it is better to clear the check box: Report's user location.

   If selected, the geocoordinates of the device will be captured when the questionnaire is submitted. This value is not exposed today and is reserved for future use.

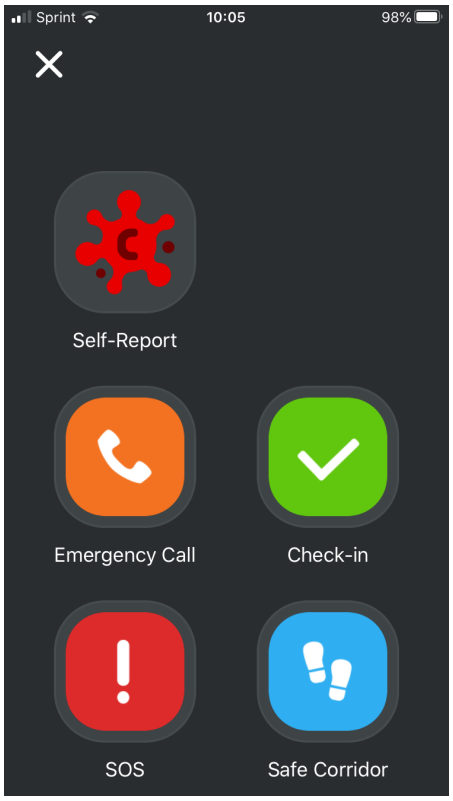
   Once the questionnaire has been submitted, a message can be displayed to the end user using the Customized Confirmation message option.

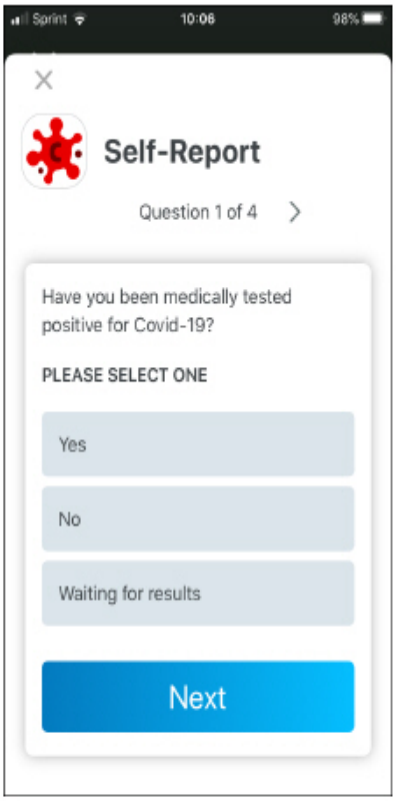
   Once set up, the new button will be displayed in the Everbridge Mobile App.

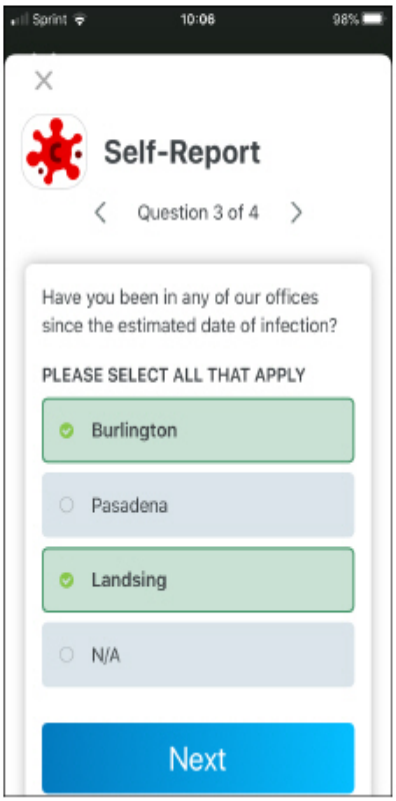
8. Proceed to Using the Self-Report Button.

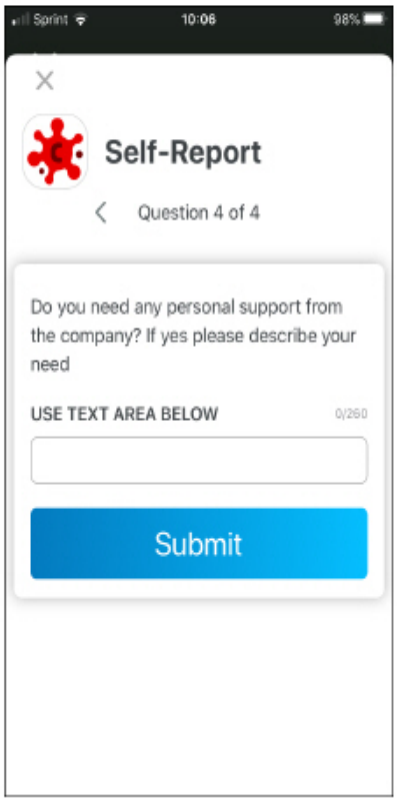
Using the Self-Report Button

1. From a mobile device installed with the Everbridge Mobile App, tap the **Safety** icon at the bottom of the page.
2. Tap the new **Custom Form Button Misc. Report** and reply to each question of the questionnaire.



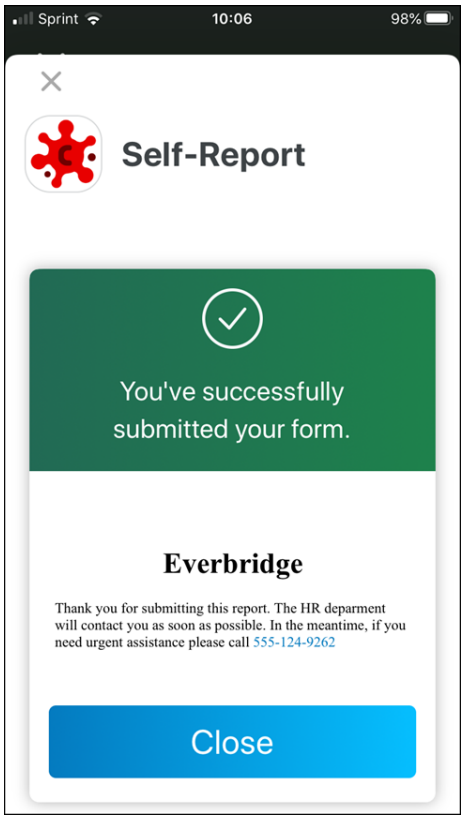




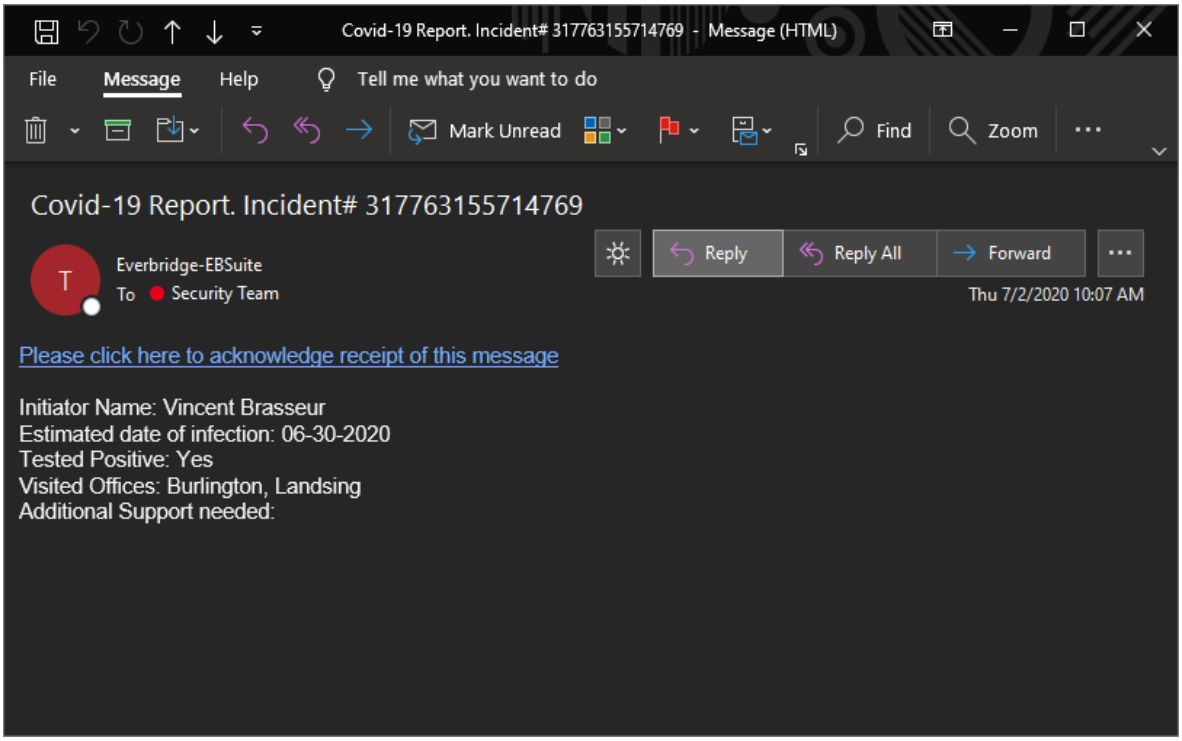


3. Validate the questionnaire.

4. Once validated, an Incident will be generated using the Incident Template attached to the custom button. In this example, an email message is received each time the button is used.



NOTE: The text above the Close button is the Customized Confirmation Message set on the Self-Report Button.



Reporting on the Self-Report Button

Using the Contact Tracing Quick Report

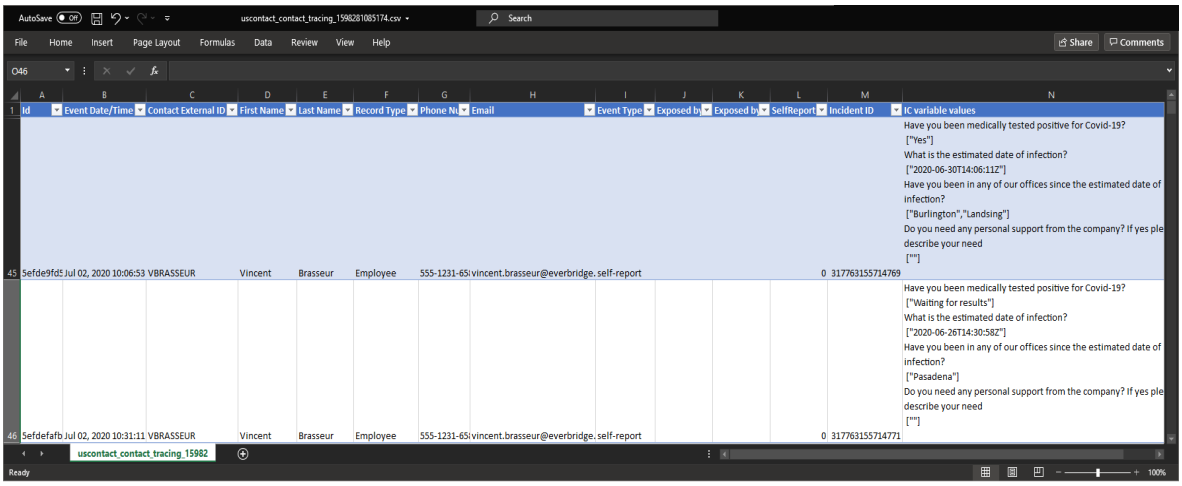
You can view a chart and download the list of all your contacts that have used the Everbridge Mobile App Self-Report buttons for a specific period.

To use the Contact Tracing Quick Report:

1. From the Organization level, click **Reports**.
2. Select the **Contact Tracing Report** from the list of Quick Reports.
3. Click **View Report**. By default, the time frame is set to 14 days ending on the current date.
4. Optionally, adjust the Start and End dates to a different time frame.
5. Click **Update** to refresh the charts. The chart displays the number of Self-Reports for all buttons of this type on a day-by-day basis. Positioning the cursor on each data point shows the date and the corresponding value.

   This report displays both Self-Report and Exposure events data.
6. Download For—The detailed data corresponding to the charts can be downloaded as a CSV file. Select the contact record type on which to report, then click **Download CSV** to generate and download the file.

Once downloaded, the file can be viewed in Excel. All questions and answers from the questionnaire are displayed in the last column.



Id	Event Date/Time	Contact External ID	First Name	Last Name	Record Type	Phone Nu	Email	Event Type	Exposed by	Exposed by	SelfReport	Incident ID	IC variable values
5efde9fd5	Jul 02, 2020 10:06:53	VBRASSEUR	Vincent	Brasseur	Employee	555-1231-65	vincent.brasseur@everbridge.	self-report			0	317763155714769	Have you been medically tested positive for Covid-19? ["Yes"] What is the estimated date of infection? ["2020-06-30T14:06:11Z"] Have you been in any of our offices since the estimated date of infection? ["Burlington","Landsing"] Do you need any personal support from the company? If yes ple describe your need [""]
5efdefafb	Jul 02, 2020 10:31:11	VBRASSEUR	Vincent	Brasseur	Employee	555-1231-65	vincent.brasseur@everbridge.	self-report			0	317763155714771	Have you been medically tested positive for Covid-19? ["Waiting for results"] What is the estimated date of infection? ["2020-06-26T14:30:58Z"] Have you been in any of our offices since the estimated date of infection? ["Pasadena"] Do you need any personal support from the company? If yes ple describe your need [""]

NOTE: None of the end-user details will be displayed if the Self-Report is set to "anonymous" in Everbridge Suite.

Incidents

You can view the list of all Incidents triggered by all Self-Report buttons from the Organization level by selecting **Incidents** > **Open/History**.

Exposure Events

Exposure events rely on the Everbridge Mobile App and Bluetooth technology to continuously detect if devices are in proximity of other ones. If one contact self-reports as COVID-19 positive, all other contacts that have been in his/her proximity for the past 14 days can be alerted and an incident can be triggered in Everbridge Suite.

The different steps to configure, use, and report on an exposure event are described in this section:

- Setting up Contact Tracing Settings
- Setting up the Everbridge Mobile App
- Reporting on Exposure Events

> **NOTE:** This feature is only available to Safety Connection Pro customers.

Setting Up Contact Tracing Settings

1. Using the Manager Portal, from the Organization level, click the **Settings** tab. Then select **Everbridge Mobile App** > **Application Options** > **Contact Tracing**.
2. Select the checkbox: **Enable Mobile App Bluetooth Proximity Tracing**.
3. If you want to send an alert:
    a. Select the checkbox: **Enable app to notify mobile users after exposure event**. A push notification is sent to contacts at risk.

    > **NOTE:** Everbridge Mobile App users must enable push notifications on their devices to receive these alerts.

    b. Enter the alert message that will be displayed to the Everbridge Mobile App users.
4. If you want to trigger an Incident each time an exposure event occurs:
    a. Select the check box: **Trigger Incident after Exposure Events**.
    b. Select an Incident Communication template.
    c. Indicate if the Incident should be closed immediately after sending the notification by selecting or clearing the checkbox: **Autoclose the Incident**.

Setting Up the Everbridge Mobile App

The exposure event feature has the following requirements on the mobile device:

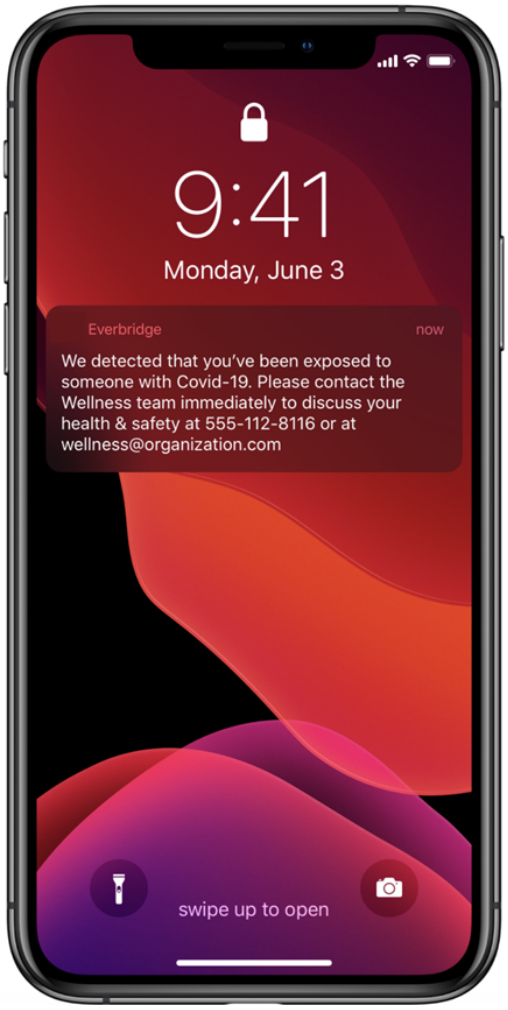
- Bluetooth must be enabled for the Everbridge Mobile App. On some Android devices, both Location Permissions and Location Services may be needed for the Bluetooth advertisement and scanning capability to work.
- Push Notification must be enabled for the Everbridge Mobile App to receive exposure notifications.

These permissions can be turned off by end users on personal devices. In that case, the Exposure Event feature might not work.

Once the Bluetooth proximity feature is activated on the Manager Portal, devices installed with the Everbridge Mobile App will receive a new anonymous key every 24 hours. When two of these devices are in range of about 6 feet for more than 15 minutes, they will both exchange their keys. All keys are kept on mobile devices for a maximum of 14 days.

When a contact reports himself/herself as self-positive for COVID-19 using a Self-Report, the following will happen:

- All the keys received from the server on his/her device will be sent back to the Everbridge server.
- These keys will be sent to all devices installed with the Everbridge Mobile App within the same organization.
- Within the next 2 to 8 hours, each connected device will try to match these keys with all keys exchanged during proximity events. If a match is found, depending on the Manager Portal Configuration:
    - The device may issue an alert through a push notification. For instance:



- An Incident might be triggered.

> **NOTE:** Regardless if the Self-Report feature has been set to "anonymous" or "non-anonymous," at no time contacts receiving an exposure notification will know who has self-reported positive. Only anonymous keys are exchanged between devices.

Reporting on Exposure Events

You can view a chart and download the list of all your contacts impacted by an exposure event for a specific period.

To use the Contact Tracing Quick Report:

1. From the Organization level, click **Reports**.
2. Select the **Contact Tracing Report** from the list of Quick Reports.

3. Click View Report. By default, the time frame is set to 14 days ending on the current date.
4. Optionally, adjust Start and End dates to a different time frame.
5. Click **Update** to refresh the charts. The chart displays the number of Exposure events on a day-by-day basis. Positioning the cursor on each data point shows the date and the corresponding value.

   > **NOTE:** This report displays both Self-Report and Exposure events data.

6. Download For—The detailed data corresponding to the charts can be downloaded as a CSV file. Select the contact record type on which to report, then click Download CSV to generate and download the file.

   Once downloaded, the file can be viewed in Excel. All questions and answers from the questionnaire are displayed in the last column.

   > **NOTE:** The CSV file will always show the details of any contact impacted by an exposure event. This information is not anonymous. If the Self-Report feature is not set to anonymous, the report will also display the detail of the contact that has self-reported positive and generated the exposure event. If the Self-Report feature is set to anonymous, the details of that contact will not be available in the report.

Using View Location History

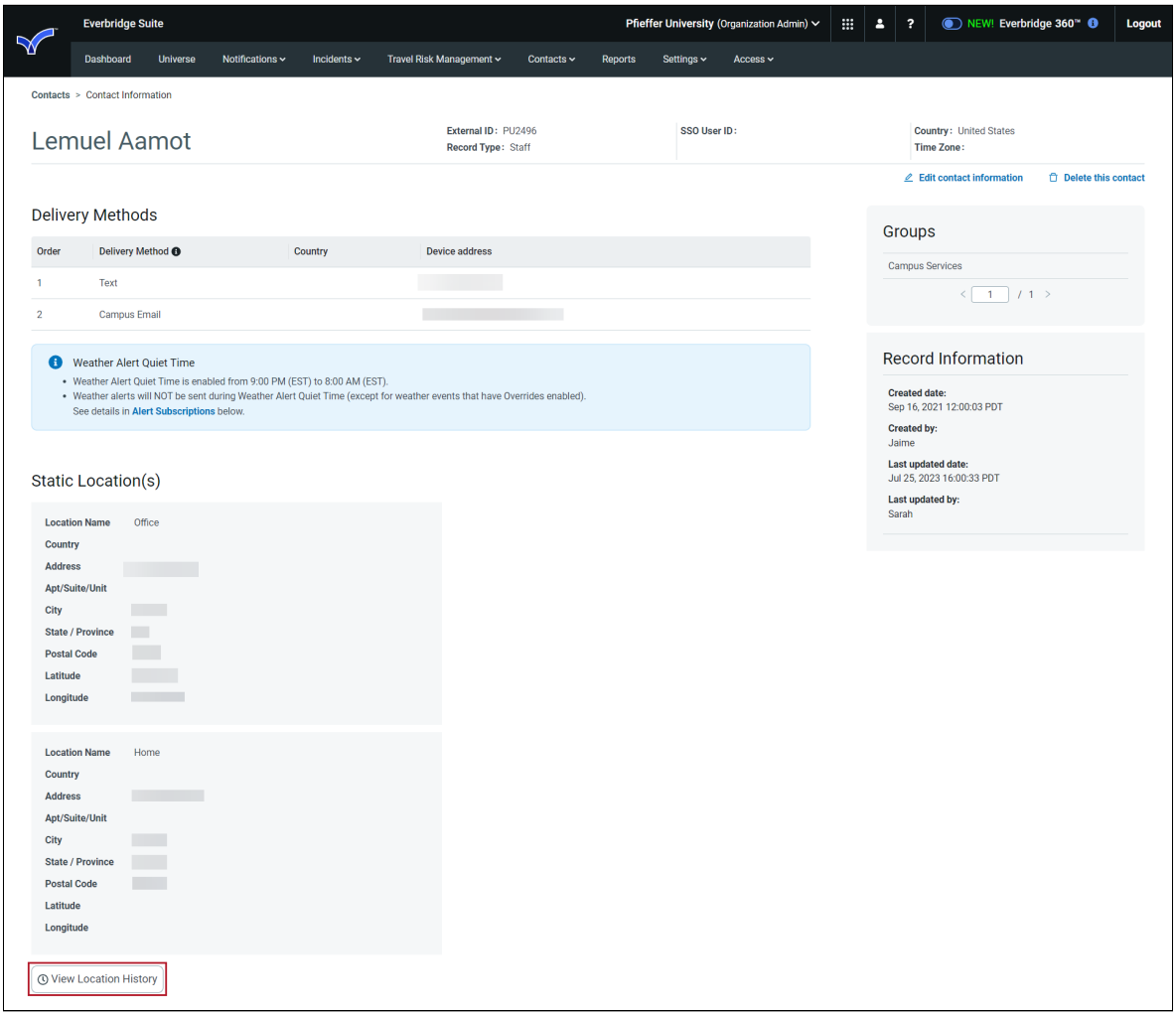
Access to the View Location History feature is limited to:

- Account Administrators
- Organization Administrators

Accessing the View Location History

To access the View Location History feature:

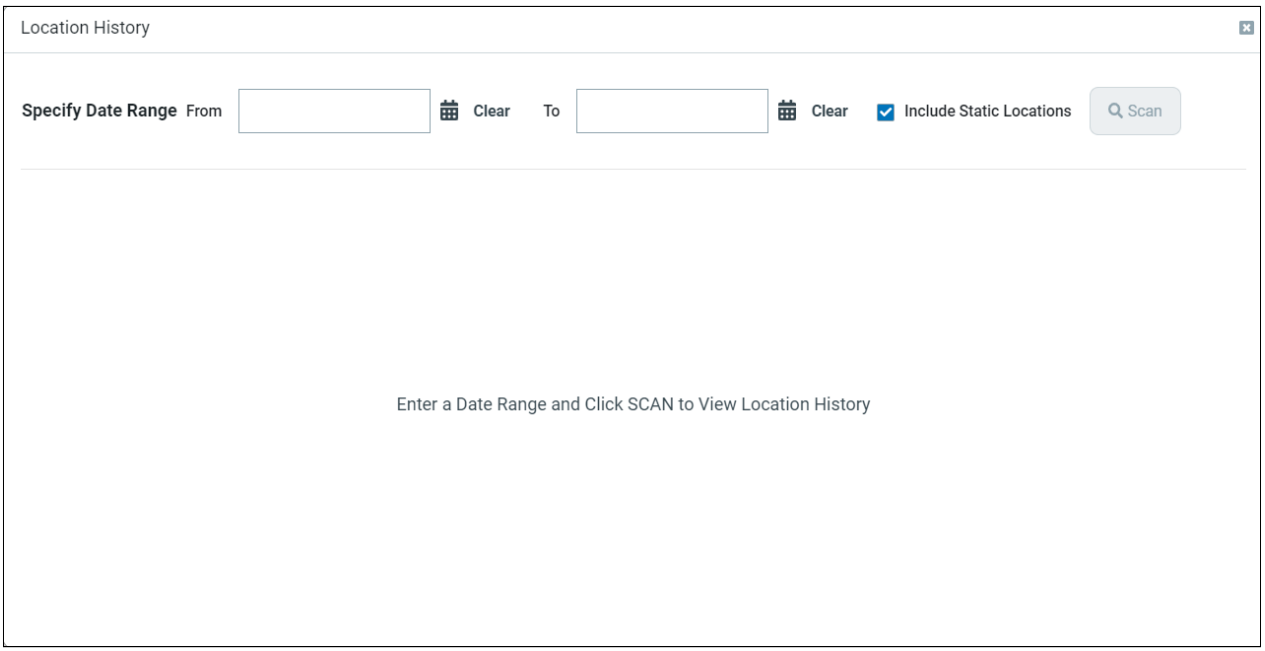
1. From the Organization level, navigate to **Contacts** > **Contact List**. The list of contacts is displayed.
2. Select an existing contact in **View** mode by clicking the contact's First Name.
3. From the Contact Information page (in View mode), click the **View Location History** button located below the Static Location(s).



4. Continue to the procedure To query and view the results,

Querying and Viewing the Results

After clicking the **View Location History** button, the following pop-up window is displayed:



The analysis is performed as follows. The system goes back in time for the duration of the date range and looks at all the location data for the considered contact, such as:

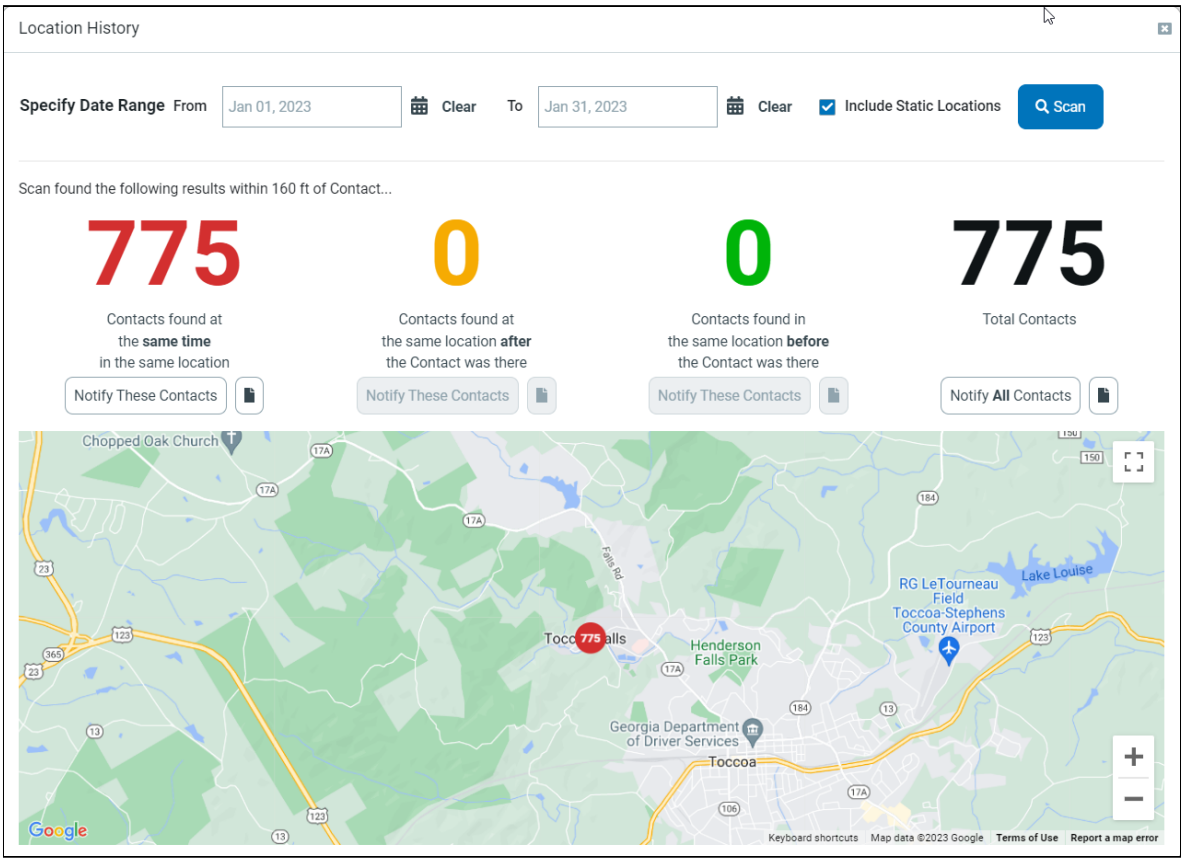
- Static location based on the setting
- Last known locations
- Expected Locations
- Check-ins and any other location data obtained from the Safety buttons of the Everbridge Mobile App

For each of these locations, a circle of 50 meters (164 feet) is considered. All contacts found in these areas for the full date range are classified into four categories:

1. In **red**, contacts who were in these locations at the same time as the considered contact.
2. In **orange**, contacts who were in these locations later than the considered contact, but never at the same time.
3. In **green**, contacts who were in these locations prior to the considered contact, and never at the same time or later.
4. In **black**, all contacts from the three categories above

To query and view the results:

1. Enter a date range. The From and To dates cannot be more than a month apart.
2. Clear the Include Static Locations checkbox if these need to be discarded from the analysis.
3. Click **Scan** once the parameters are set. The Location History displays the results.

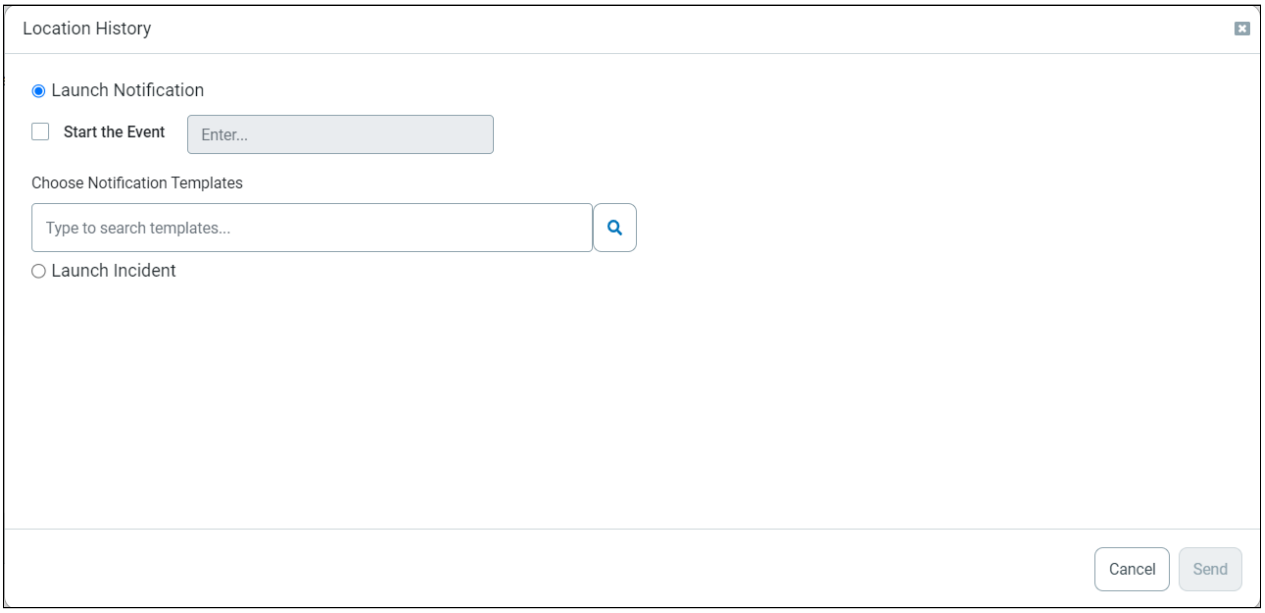


4. Click the **Download Contacts** icon to view a list of all contacts in each category. The following properties are exported:
    - Contact ID
    - Contact External ID
    - Contact First Name
    - Contact Middle Name
    - Contact Last Name
    - Contact Suffix
    - Geo-coordinates (longitude and latitude) of the location)
    - Arrival time of the contact
    - Departure time of the contact
    - Location Type: Static, Expected, Last Known Location, and so on
    - Location Source: Manual, Connector Name, and so forth, when available

- Everbridge Record ID: internal Everbridge Suite identifier

Starting a Notification or an Incident

From the **Location History** results, a Notification or an Incident targeting a group of contacts can be started by clicking the **Notify These Contacts** button. The following dialog is displayed:



To launch a Notification or an Incident:

1. To launch a **Notification**, perform the following steps:
    a. Select the **Launch Notification** radio button.
    b. Search for the desired Notification Template, then click the blue **+** sign.
    c. Optionally, to remove a Notification Template from the Threshold, click the **Trash Bin** to the left of the desired Notification Template name.
    d. Optionally, select the checkbox: **Start the Event**, and enter the name of the event.
    e. Proceed to Step 3 below.
2. To launch an **Incident**, perform the following Steps:
    a. Select the **Launch Incident** radio button.
    b. Search for the desired Incident Template, then click the blue **+** sign.
    c. Optionally, to remove an Incident Template from the Threshold, click the **Trash Bin** to the left of the desired Notification Template name.
    d. Proceed to Step 3 below.
3. Click the **Send** button.

NOTE: Only Incidents with no mandatory variables can be used in this feature. Launching an Incident that requires mandatory variables will return an error.

Using Travel Connectors

Everbridge Safety Connection delivers connectors to update a contact's expected location from travel itinerary data. These itineraries are made of flight, train, car, or hotel bookings.

Visit the CEM Connectors page on the Everbridge Support Center for downloadable resources including documentation.

Configuring Default Travel Connector Settings

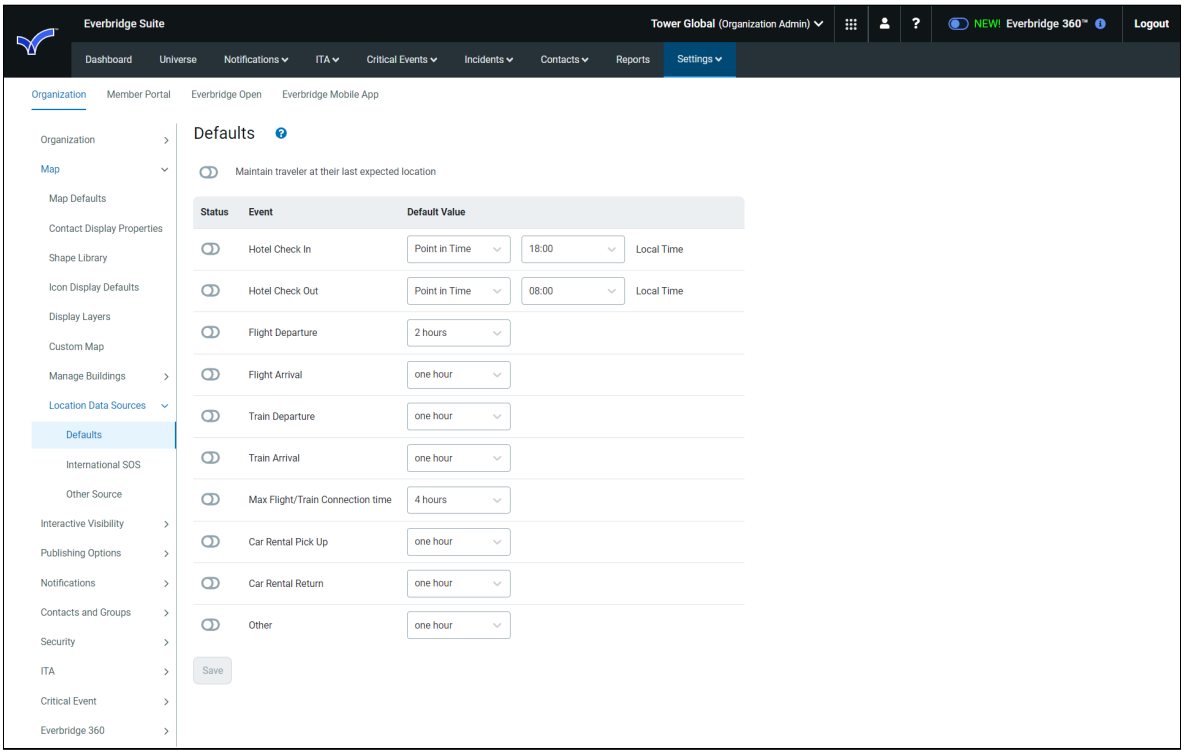
In **Settings** > **Organization** > **Map** > **Location Data Sources** > **Defaults**, you can set up values that will be used to set the duration of the expected locations generated from travel segments.

Expected locations generated from travel itineraries are set by default to start or expire 24 hours before or after travelers reach a specific location. For instance, if a traveler is leaving his/her home to take a flight, he/she will be considered at the airport 24 hours before the scheduled time for the flight. Similarly, a traveler reaching a destination will be considered at that location for 24 hours after the expected arrival date/time. These 24-hour periods or expected locations enable Everbridge to send alerts related to events that may impact the traveler. These periods can be fine-tuned on the Defaults page.

To configure the Travel Periods:

1. Navigate to **Settings** > **Organization** > **Map** > **Location Data Source** > **Defaults**.
2. To change a setting, select the corresponding value for each travel segment type.
3. Change the status of the setting to activate it.

4. Click **Save**.



For train, flight, and car rental, **two** expected locations are created for each travel segment. For hotel segments, only one expected location is created for the duration of the stay. The rules to calculate the start and end dates of each expected location are as follows:

Setting	Value	Rule
Hotel Check-In	Off	The expected location starts on the check-in date/time found in the itinerary segment minus 24 hours.
	On and set to a length of time	The expected location starts on the check-in date/time found in the itinerary segment minus the length of time specified.
	On and set to a point in time	The expected location starts on the check-in date and time specified in the setting.
Hotel Checkout	Off	The expected location ends on the check-in date/time found on the itinerary segment plus 24 hours.
	On and set to a length of time	The expected location ends on the check-in date/time found on the itinerary segment plus the length of time specified.
	On and set to a point in time	The expected location ends on the check-out date and time specified in the setting.

Flight Departure	Off	The expected location starts on the flight departure date/time found in the itinerary segment minus 24 hours and ends on flight departure date/time at the departure airport.
	On	The expected location starts on the flight departure date/time found in the itinerary segment minus the length of time specified in the setting and ends on flight departure date/time at the departure airport. An additional rule may be applied if the Max Flight/Train connection setting is used.
Flight Arrival	Off	The expected location starts on the flight arrival date/time found in the itinerary segments and ends 24 hours later at the destination airport.
	On	The expected location starts on the flight arrival date/time found in the itinerary segment and ends on the flight arrival date/time found in the itinerary segment plus the length of time specified in the setting at the destination airport. An additional rule may be applied if the Max Flight/Train connection setting is used.
Train Departure	Off	The expected location starts on the train departure date/time found in the itinerary segment minus 24 hours and ends on train departure date/time at the departure station.
	On	The expected location starts on the train departure date/time found in the itinerary segment minus the length of time specified in the setting and ends on train departure date/time at the departure station. An additional rule may be applied if the Max Flight/Train connection setting is used.
Train Arrival	Off	The expected location starts on the train arrival date/time found in the itinerary segments and ends 24 hours later at the destination station.

	On	The expected location starts on the train arrival date/time found in the itinerary segment and ends on the train arrival date/time found in the itinerary segment plus the length of time specified in the setting at the destination station. An additional rule may be applied if the Max Flight/Train connection setting is used.
Car Rental Check In	Off	The expected location starts on the car rental check in date/time found in the itinerary segment minus 24 hours and ends on the car rental check in date/time.
	On	The expected location starts on the car rental check in date/time found in the itinerary segment minus the length of time specified in the setting and ends on the car rental check in date/time.
Care Rental Return	Off	The expected location starts on the car rental return date/time found in the itinerary segments and ends 24 hours later.
	On	The expected location starts on the car rental return date/time found on the itinerary segment and ends on the car rental date/time found on the itinerary segment plus the length of time specified in the setting
Others	Off	Reserved for future use.
	On	Reserved for future use.
Max Flight/Train Connection	Off	No rule is applied.
	On	If the time difference between two train or two flight segments is less than the Max Flight/Train Connection time setting and the airports/train stations are the same, only one expected location is created from the date/time arrival of the first flight/train to the next flight/train date/time departure.

Note that expected locations generated from travel segments may overlap with each other. In that case, the traveler will be considered in all overlapping locations at the same time.

Maintain Travelers at the Last Expected Location

In some situations, there may be a gap between two expected locations generated from two successive travel segments. For instance, a traveler may book a hotel outside of the company travel system or stay with relatives when traveling to a city. In that case, there may be a duration in-between the expected location generated by the air/rail travel segment that brought the traveler to that city and the one that will bring the traveler out where no expected locations exist.

Another scenario is when a traveler is arriving in the morning at a destination and considered only at the arrival airport or train station for a few hours, and then checks in later in the evening at the hotel. In each of these situations, the system will not be able to locate the traveler; if any local event is occurring during these gaps, the traveler will not be alerted. To avoid such a situation, the **Maintain the traveler at the Last Expected Location** toggle can be used. This setting keeps the traveler to his/her Last Expected Location until a new one is generated. On the last segment of the itinerary, that setting is not applied.