Everbridge Suite User Guide

Everbridge Suite

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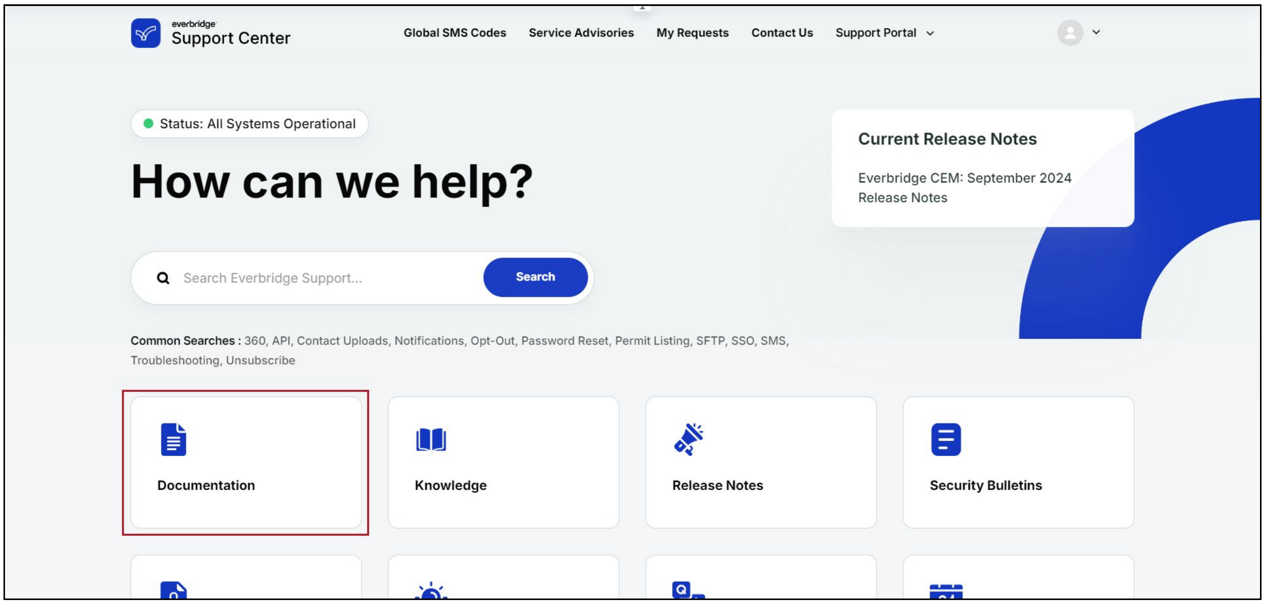
Everbridge software is covered by US Patent Nos. 6,937,147; 7,148,795; 7,567,262; 7,623,027; 7,664,233; 7,895,263; 8,068,020; 8,149,995; 8,175,224; 8,280,012; 8,417,553; 8,660,240; 8,880,583; 9,391,855. Other patents pending.

Introduction

The **Everbridge Suite User Guide** is your reference source for using the production system. It provides information about the Everbridge Suite products to enable you to configure and use the system.

Related Documentation

Documentation is provided to help you implement and run the Everbridge Suite of products. In addition to this publication, the Everbridge Suite documentation set consists of the following guides. You can view, download, and print the PDF-formatted guides from the Everbridge Support Center.



NOTE: See the Everbridge Technical Support Services Guide for more support options.

Guide	Description
Advanced Reporting Guide	Walks users through using **Advanced Reporting**, including how to create and share dashboards or reports.
Asset Management Guide	Describes how to use **Asset Management** to manage their Organization's buildings, contacts, or other important assets.
CEM Orchestration Guide	Describes how to configure and use **CEM Orchestration** to manage alerting and automated communications, and respond to Risk Events impacting people and assets.

Contact Integration Guide	Guides users through setting up a **Contact Integration** via Microsoft Entra ID, UKG Pro, Workday Report, or Workday API.
Crisis Management User Guide	Provides information about using and configuring the **Crisis Management** product. It introduces the key functionality around planning, orchestration, and managing Critical Events.
Custom Roles Guide	Describes how to configure and use **Custom Roles**, which allows users to create a role using a preexisting role as a template.
Custom Roles Permissions Grid	A grid that outlines which permissions can be configured with **Custom Roles**.
Everbridge 360: User Guide	Describes the **Everbridge 360** interface and interface-specific functionality, such as sending a Communication or configuring an Organization Code.
Everbridge 360: Mobile and Desktop Apps Guide	Guides users through the setup and functionality of the **Everbridge 360 Mobile and Desktop** apps.
Everbridge Developer Hub	Offers comprehensive guides and documentation to help you start working with Everbridge's APIs as quickly as possible.
Everbridge IPAWS User Guide	Provides information on configuring an Organization to send and manage **IPAWS** messages from Everbridge Suite.
Everbridge Mobile App User Guide	The **Everbridge Mobile App** is available for Apple iPhone, Apple iPad, Android Smart Phones, and tablets. It enables two-way communications with your members. They can reply to surveys and supply additional information, including pictures and their location.

Everbridge Open User Guide	Teaches users about the two-way capabilities offered by **Everbridge Open** that allow third-party systems to create powerful closed-loop integrations with our Critical Event Platform.
Everbridge University User Guide	Walks learners through enrolling and completing training courses within **Everbridge University**.
Incident Communications User Guide	
Interactive Visibility User Guide	Enables administrators to set up configuration options and operators to use the **Interactive Visibility** capabilities.
IT Alerting Guide	Details how **IT Alerting** automates and streamlines communications during major IT Incidents to resolve issues faster and minimize their impact on the business.
ManageBridge User Guide	Describes how to configure and use the **ManageBridge** mobile app to send Notifications, Incidents, and more.
Public Safety by Everbridge User Guide	Explains how citizens can set up and use the **Public Safety by Everbridge** mobile app to subscribe to and receive updates from their local public agencies, like law enforcement or fire department.
Resident Connection - United States Guide	Details how to use **Resident Connection - United States**, which allows State and Local Government Agency users to send Incident Communication and Mass Notification messages via Short Message Service (SMS) text message, Voice over Internet Protocol (VoIP), Wireless, or Landline telephone calls to residents and businesses in their jurisdictional area.

Resilience Insights User Guide	Explains how **Everbridge Resilience Insights** provides access to our rich risk intelligence data to deliver actionable insights with precision, agility, and confidence.
Safety Connection User Guide	Enables administrators to set up configuration options so that operators can use the **Safety Connection** capabilities.
Scheduling User Guide	Provides information about configuring and using the **Scheduling** module, such as creating a calendar or shift.
SMART Weather Alerting User Guide	Details how to configure and use SMART Weather Alerting to automate weather alerting for an Organization.
Travel Protector User Guide	Teaches how to configure and use the **Travel Protector** product, such as creating booking alerts or sending pre-trip travel advisories to travelers.
Visual Command Center User Guide	Describes how to use and administer **Visual Command Center**, the visualization and orchestration engine for the Everbridge Critical Event Management platform. For example, how to configure alerts and feeds, manage asset data, and configure Incident settings in Visual Command Center.

System Overview

Everbridge Suite allows users to send messages to people through a variety of methods:

- Individually
- Groups (static and dynamic)
- Rules (dynamic)
- Map (location of contacts)
    - Home and work (static)
    - Expected (travel)
    - Last known (badging)

Following your Organization's communications plan, everyone can be informed before, during, and after events, whether the events are emergency or non-emergency.

In Everbridge Suite, the Everbridge account is the top level of all implementations. Each account has at least one Organization, and each Organization can have multiple groups. Each Organization has its own contacts, who receive Notifications.

Registering Your Access to the Manager Portal

To be a user in Everbridge, you need to register a profile. When invited, you receive an email like this:

> **Everbridge User Registration Invitation**
>
> Dear Sarah,
>
> An Everbridge user account has been created for you by an administrator for Customer Learning Universe. In order to gain access, you are invited to register your account. This invitation will expire in 72 hours.
>
> To register your account, just click on the link below or paste it into your browser.
>
> https://manager-qa1.everbridge.net/registers?auth=TyWn4BO2DnU%3D&code=M%2Bq04f9KvcHY8AeofnMRB5uWJpTPsDmgfSQnLAN746Q%3D
>
> Should you have any questions or if you received this invitation in error, please contact an administrator.
>
> Regards,
> Customer Learning Universe

Before the invitation expires, click the link to get to the registration page and create your profile.

1. **Username**: Give yourself a username. You will use this username to log in to the Everbridge Manager Portal. Usernames are case-insensitive and must be a minimum of four acceptable characters and a maximum of 80 characters. Acceptable characters are:
   - Uppercase letters (A-Z)
   - Lowercase letter (a-z)
   - Numerals (0-9)
   - Period (.)
   - Dash (-)
   - Underscore (_)
   - At symbol (@)
2. **Password**: Select your password. It must be at least eight characters. It must contain at least one item from three of the following four groups:
   - Uppercase letters (A-Z)
   - Lowercase letter (a-z)
   - Numerals (0-9)
   - Special characters: ! @ # $ % ^ & * ( )
3. **Confirm Password:** Re-enter your password to confirm what you entered.

4. **Secret Question**: Select a security question from the Question drop-down list that only you will know. If the system needs to confirm your identity, it asks this question.
5. **Answer**: In this field, type the answer to the question. Optionally, select the checkbox: **Show answer**.
6. **Time Zone**: From this drop-down list, select your time zone.
7. Click **Continue.**
8. Go to the Everbridge login page: **http://manager.everbridge.net** or **http://manager.everbridge.eu**.
9. Enter the **Username** and **Password** you just created.
10. Click **SIGN IN.** After you are signed in, you can manage your user profile. See Managing Your User Profile.

NOTE: If you become locked out of your account after three or five failed login attempts, either contact your Administrator or choose to unlock the account yourself.

Managing Your User Profile

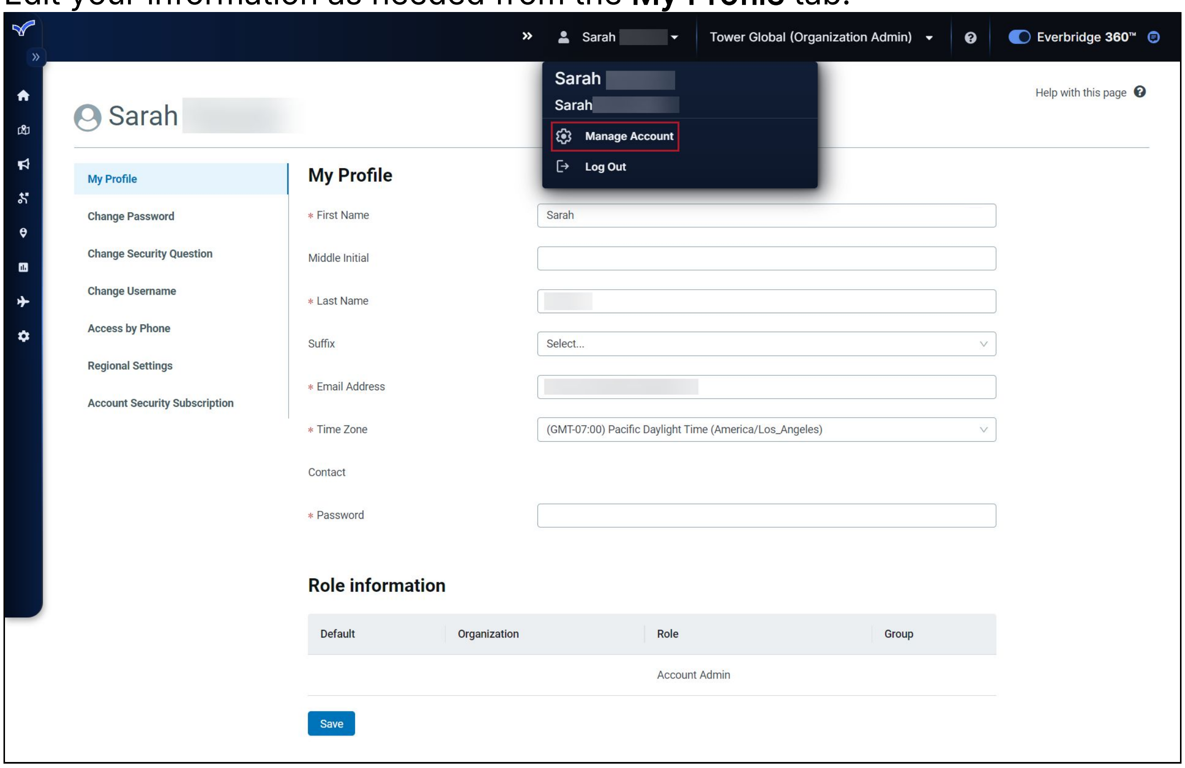
After successfully logging in, you will see an Everbridge Suite page. You have access rights to the navigation tabs depending on your permissions and your Organization's purchased products. See Apps Menu for more details.

Make Changes to Your User Profile

Once you have logged in to Everbridge Suite, you can make changes to your user profile, your password, your security question, your ability to launch Notifications by phone, and/or your regional settings.

To change your profile:

1. Click your username located at the top of the page, then **Manage Account**.
2. Edit your information as needed from the **My Profile** tab.



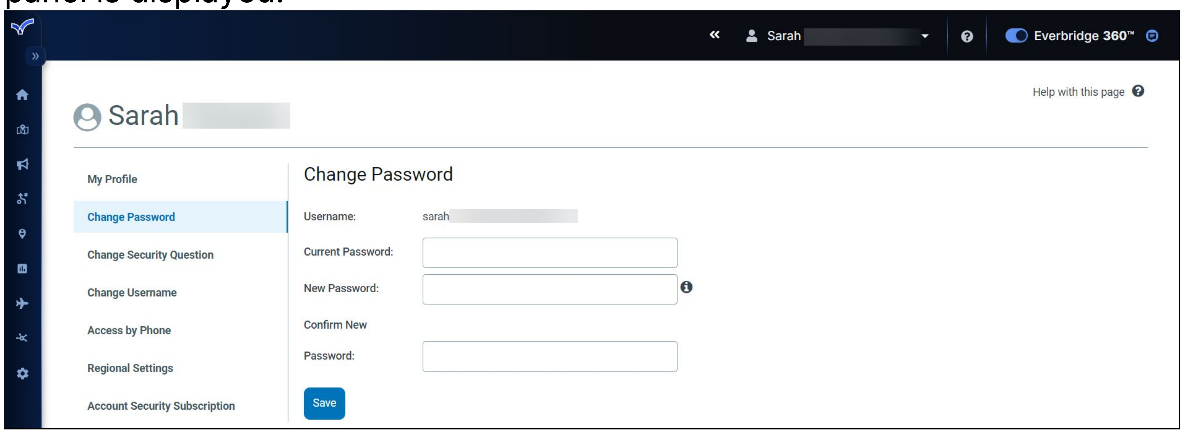
3. In the **Password** field, enter your login password. Users logging in via Single Sign-On will not be required to enter a password.
4. Click **Update**.

> **NOTE:** When setting your Time Zone, know that the application automatically changes to Daylight Savings Time (DST) and automatically resets in Spring, as needed.

Change Your Password

To change your password:

1. Click **Change Password** from the left-hand panel. The **Change Password** panel is displayed.



2. Enter the password information in the fields and click **Save**.

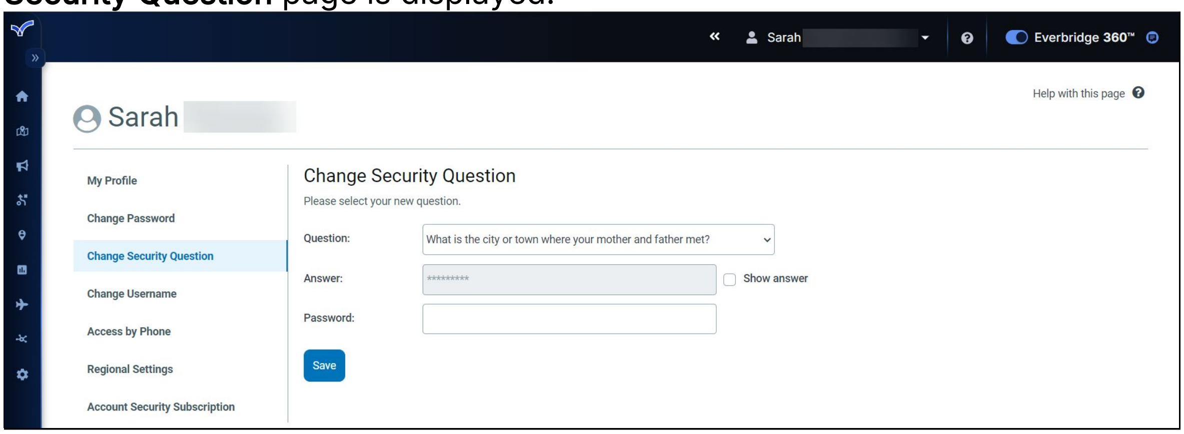
Federal Clients	Non-Federal Clients
At least 12 characters.	At least 8 characters.
At least one item from each of the following four groups: • Uppercase letters (A through Z) • Lowercase letters (a through z) • Numerals (0 through 9) • Special characters: ! @ # $ % ^ & * ( ) Cannot contain your account, first or last name	• At least one item from three of the following four groups: • Uppercase letters (A through Z) • Lowercase letters (a through z) • Numerals (0 through 9) • Special characters: ! @ # $ % ^ & * ( ) Cannot contain your account, first or last name.
Password lock after 3 attempts.	Password lock after 5 attempts.
Password Expiration default: ON Prompt users to create a new password every: • 30 Days. • 60 Days.	Password Expiration default: ON Prompt users to create a new password every: • 90 Days. • 180 Days.

• 180 Days.	• 365 Days.
When you reset or change your password, you will need to provide a new password. The new password cannot be the same as the previous 24 passwords. If you change your password, the counter resets to zero (0) and starts a new cycle.	When you reset or change your password, you will need to provide a new password. The new password cannot be the same as the previous 3 passwords. If you change your password, the counter resets to zero (0) and starts a new cycle.
When you forget your password, you are sent a temporary password that is valid for the next 24 hours.	When you forget your password, you are sent a temporary password that is valid for the next 72 hours.

Change Your Security Question

To change your security question:

1. Click **Change Security Question** from the left-hand panel. The **Change Security Question** page is displayed.

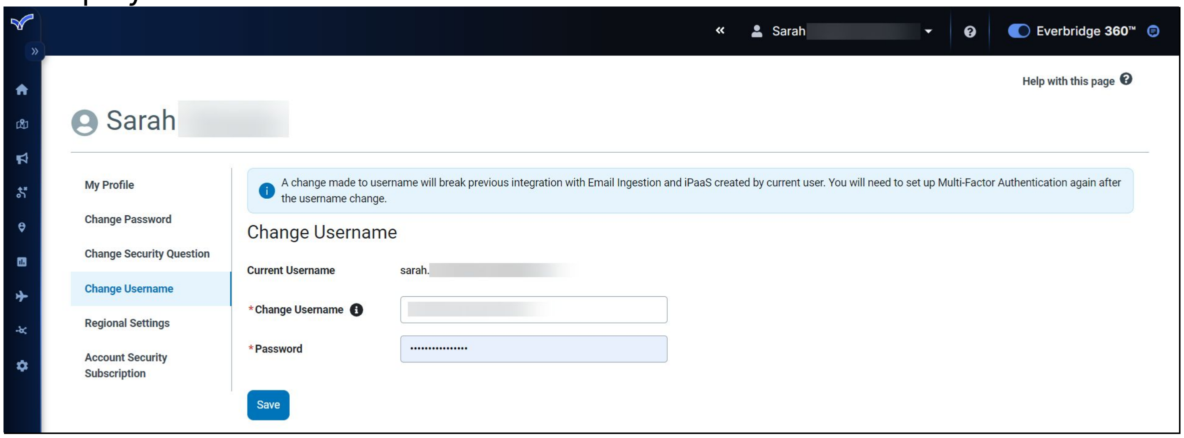


2. Select a new question from the drop-down list.
3. Type the answer to the question. Your answer is hidden. Optionally, select the checkbox: **Show answer**.
4. Type your password and click **Save**.

Change Username

To change your username:

1. Click **Change Username** in the left-hand panel. The **Change Username** page is displayed.



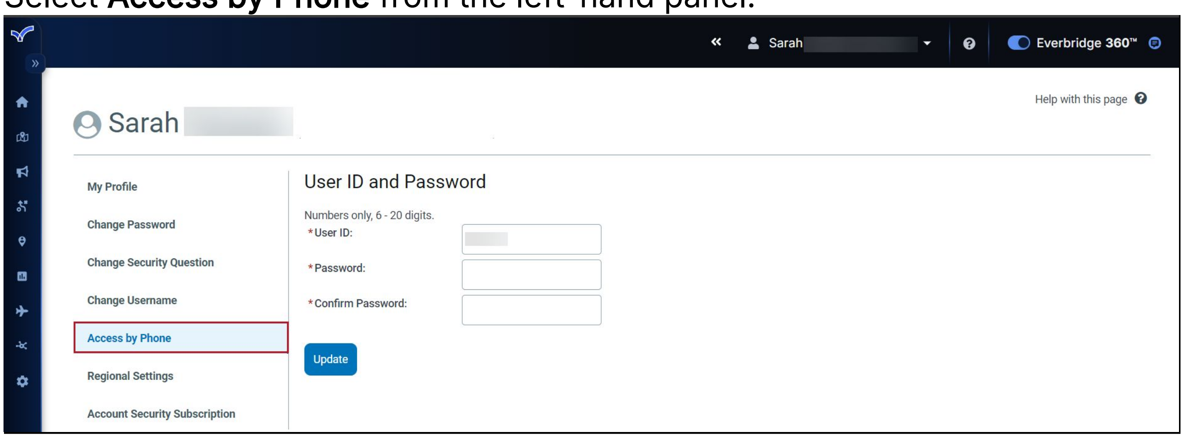
2. Enter a new username in the **Change Username** field.
3. Submit your password in the **Password** field.
4. Click **Save.**

> **IMPORTANT:** Changing the username of a user who's created Email Ingestions or iPaaS integrations will break those integrations. They will also need to set up Multi-Factor Authentication again.

Access a Notification by Phone

To be able to access a Notification by phone:

1. Select **Access by Phone** from the left-hand panel.



2. Enter your **User ID** and **Password** in the respective fields.
   - The **User ID** and **Password** must be numeric, but the fields cannot be identical. For example, if the **User ID** is "991100", then the value in the Password field cannot also be "991100".
   - The fields can only contain digits 0-9, but cannot start with zero (0).

- The values cannot contain all the same digits (such as all “1”, as in 111111).
- The values cannot be any of the following nor the reverse of any of them: 123456, 1234567, 12345678, 123456789, 124567890.

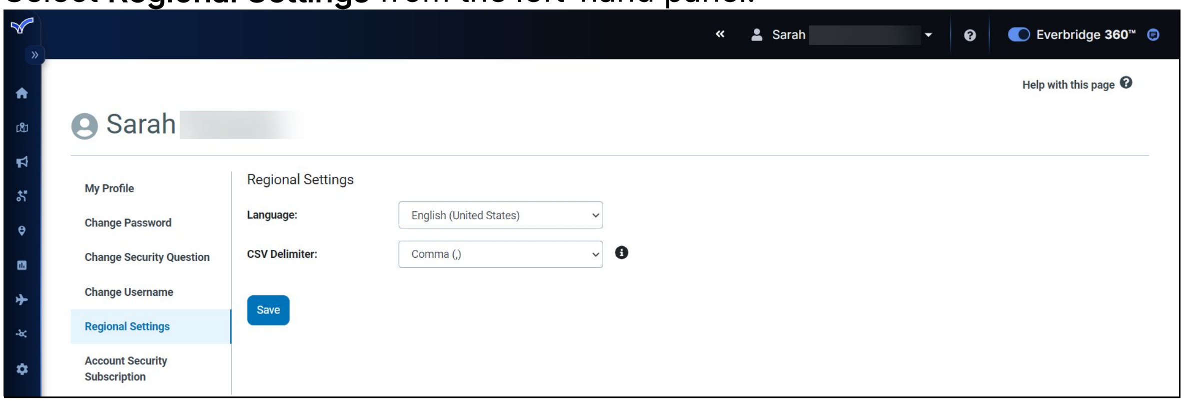
- Minimum length: 6 digits
- Maximum length: 20 digits
- The values cannot be empty.
- The values cannot contain spaces (no leading spaces, no spaces between digits, and no trailing spaces).
- The values cannot contain any non-alphabetic special characters or alphabetic characters.

3. Click **Save**.

Change User Regional Settings

To change the User Regional Settings from US English:

1. Select **Regional Settings** from the left-hand panel.



2. From the **Language** field, select your desired language from the drop-down list. Depending on the language you choose, the date format for the country automatically adjusts accordingly.
3. From the **CSV Delimiter** field, select either:
   - Comma (,)
   - Semicolon (;)

   The semicolon delimiter does not support the following:

   - Incident Quick Reports
   - Point Address Data

   NOTE: Regional Settings can be configured at either the Account level or the Organization level.

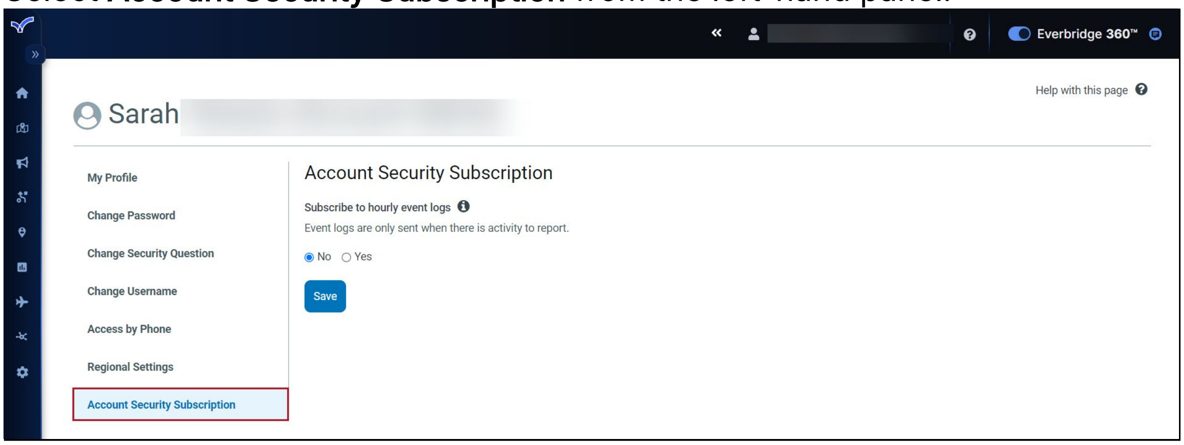
4. Click **Save**.

Turn on Security Event Monitoring

Security Event Logs can be managed and automated in the **Manage Account** section. You can subscribe to daily event logs. Event logs are only sent when there is activity to report.

To turn on Event Monitoring:

1. Select **Account Security Subscription** from the left-hand panel.



2. Click **Yes** to subscribe to daily event logs.
3. Click **Save**.

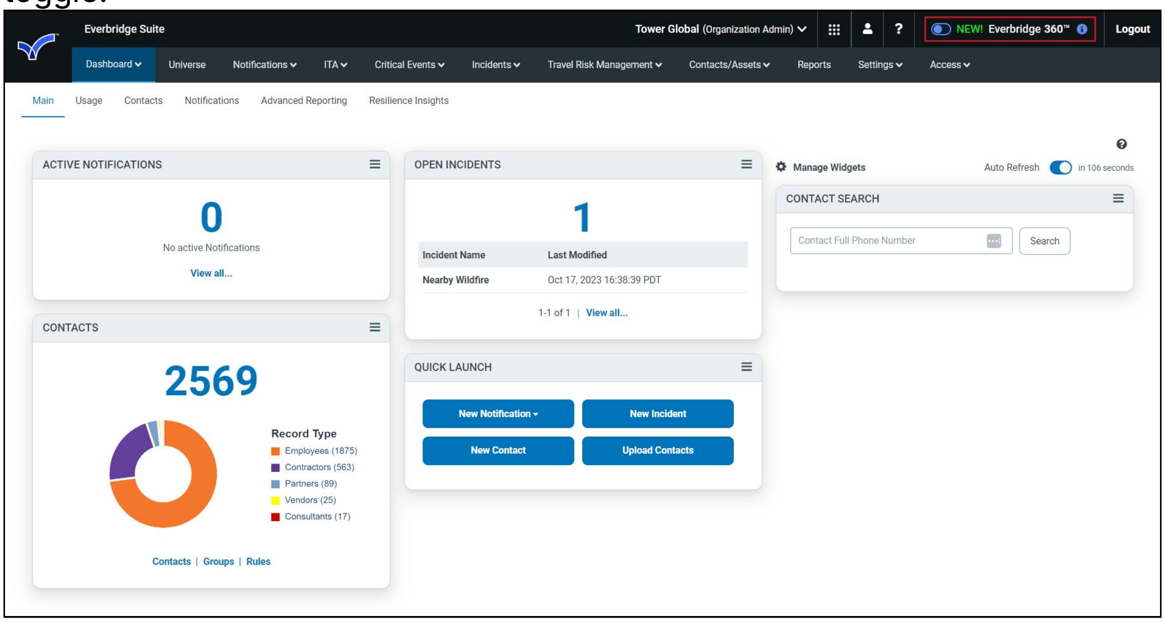
Apps Menu

The **Apps Menu** can be found on the left side of the Manager Portal. If your role has access to other Everbridge applications that your Account or Organization has purchased, they'll appear here.

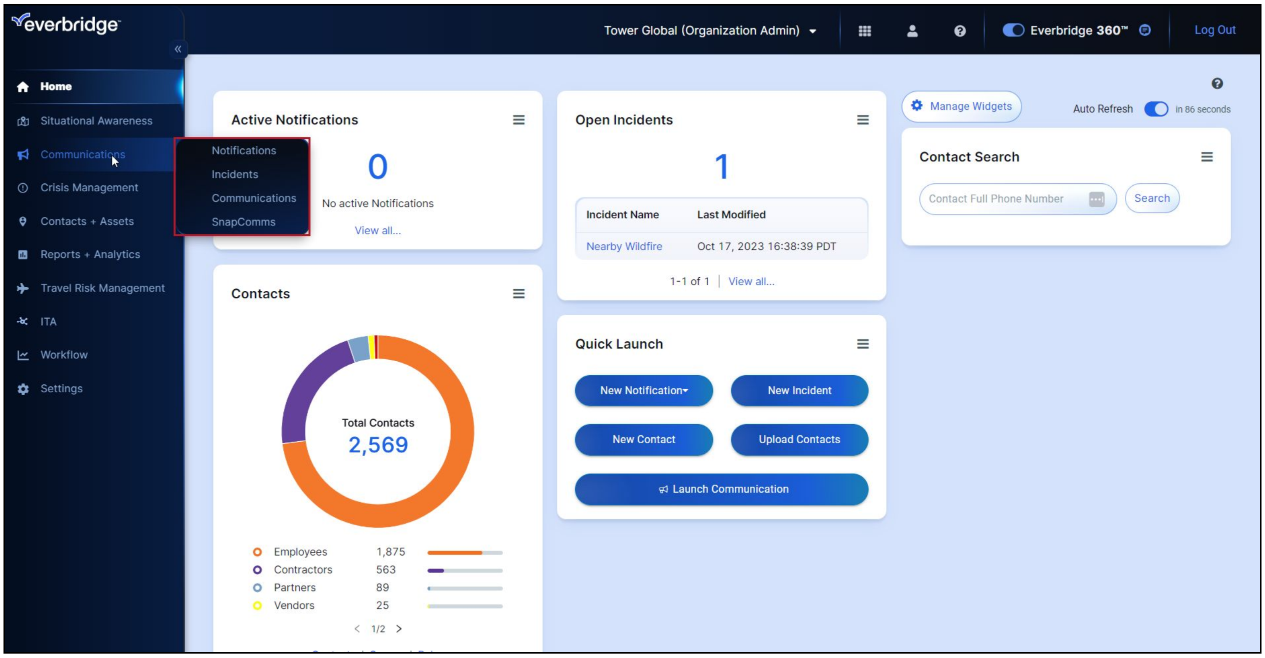
There are two different App Menus:

- Account Level (only accessible to Account Administrators)
- Organization Level

NOTE: This page describes navigating the Manager Portal with the **Everbridge 360** interface applied instead of the Legacy UI. The Everbridge 360 interface can be enabled or disabled at any time by clicking on the toggle.



Select any enabled application or module from the menu bar to access it. Hovering your mouse over certain apps in the menu bar will populate an additional menu for easier navigation to subsections within that app or module.



Account-level Menu

Account Administrators have access to the **Account-Level menu**, which includes the following modules:

Tab	Description
Communications	Notifications and templates can be reviewed, configured, and sent from here.
Contacts and Groups (or Contacts/ Assets)	View or upload Contacts and Assets.
Users	View and manage users at the Account level.
Reports and Analytics	The **Reports and Analytics** tab allows you to view Quick Reports (for example, Notification Analysis and Event Analysis)
Roles	The Roles tab allows the Account Administrator to add other Everbridge roles and permissions to users in each Organization.
Settings	View and manage Account-level settings.

Organization-level Menu

Review the following information about each navigation tab that's accessible from the Organization level:

Tab	Description
Home	The default Organization-level landing page after signing in, which displays a customizable dashboard with panels of information about the activities in your Everbridge Suite Organization.
Situational Awareness	Allows you to navigate to either **Universe** or **Visual Command Center** to monitor events on data-rich, interactive maps.
Communications	Includes access to the **Notifications**, **Incidents**, **Communications**, or **SnapComms** modules.
Crisis Management	The **Crisis Management** tab contains information and configuration options for the Organization's Critical Events. See the Crisis Management User Guide for more information.
Incidents	The **Incidents** tab is for Incident Communications. Depending on your role, see the Incident Communications User Guide.
Contacts and Groups (or Contacts/Assets)	Add and maintain recipients who will receive Notifications, such as residents, employees, and college staff. Administrators can upload Contacts and add Groups and Rules. Administrators, Data Managers, and Group Managers, if given permission, can manage calendars from the Scheduling subtab.
Reports and Analytics	The **Reports and Analytics** tab allows you to view Quick Reports (for example, Notification Analysis and Event Analysis)
Travel Risk Management	View and manage travel-related information, such as Travel Risk Intelligence or Booking Alerts. See the Travel Protector User Guide for more information.
ITA	Offers information and configuration options for IT Alerting. See the IT Alerting User Guide for more details.
Workflow	Allows users to view and configure CEM Orchestration workflows.
Settings	The **Settings** tab is provided for Administrators to configure settings specific to your Organization.

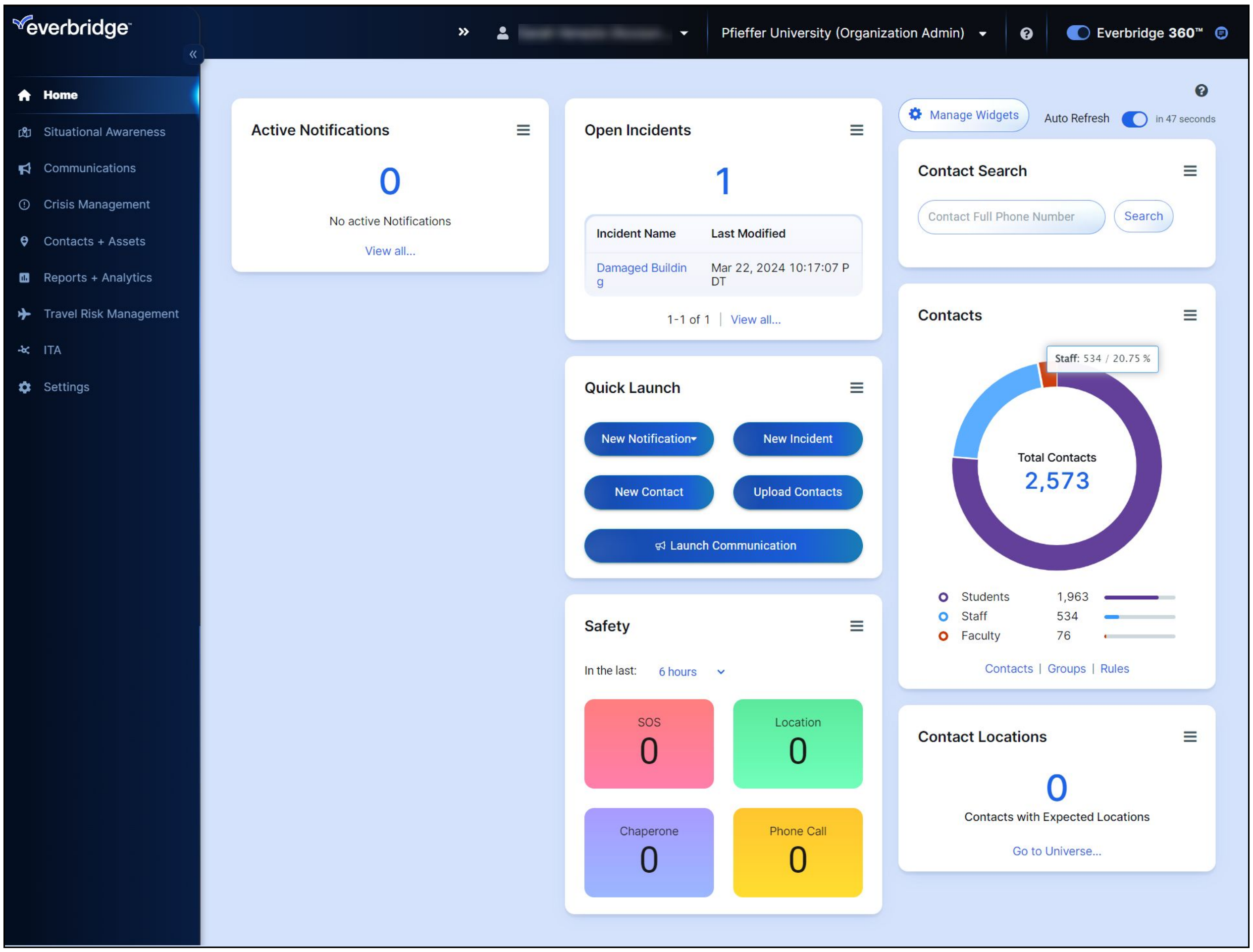
Access	The **Access** tab is displayed only if Organization Administrators have been permitted to manage users and roles.

NOTE: Some of the above options (such as Travel Risk Management and Crisis Management) will only appear if they've been purchased by the Organization.

Overview of the Dashboard

After logging in, the first page you see is the **Main Dashboard**. The panels display summary information about Notifications, Events, and Contacts. For example:

- You can use these displays to view a quick snapshot of current and recent activity.
- You can view more detailed information about your Notifications.
- You can customize the arrangement of the panels on the page to make it convenient for you to monitor your status.



The panels on the Dashboard tab allow you to track a number of items. Depending on your role, these may include:

- The number of active and recent Notifications
- The number of open incidents
- The number and type of contacts in your database
- Contact locations
- Contact search
- Summaries of Safety connections

- Event Subscriptions and their opt-ins
- Community Subscribers

Additionally, the following panels are included on the Dashboard:

- **Quick Launch**, which allows you to launch a new Notification, a new incident, add a contact, and/or upload contacts by means of CSV file.
- **Manage Widgets** gear icon allows you to choose which panels you want on your Dashboard. From this panel, you can also refresh the page or turn on/off Auto Refresh.

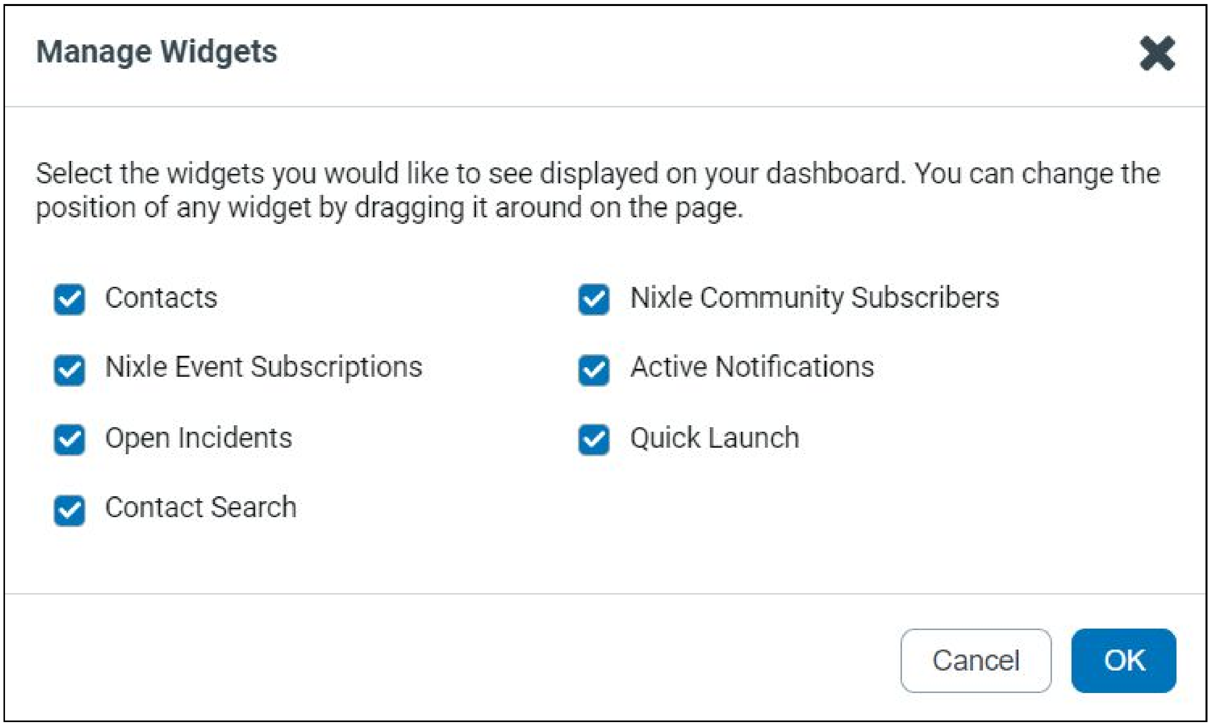
Lastly, you can toggle **Auto Refresh**, which automatically refreshes the page every 120 seconds.

Manage Widgets

You can control which panels you want to include on your **Main** dashboard. In addition, you can turn on/off **Auto-Refresh** from the **Manage Widgets** panel.

To select the panels you want to include on your dashboard, click **Manage Widgets**, and the **Manage Widgets** dialog is displayed.

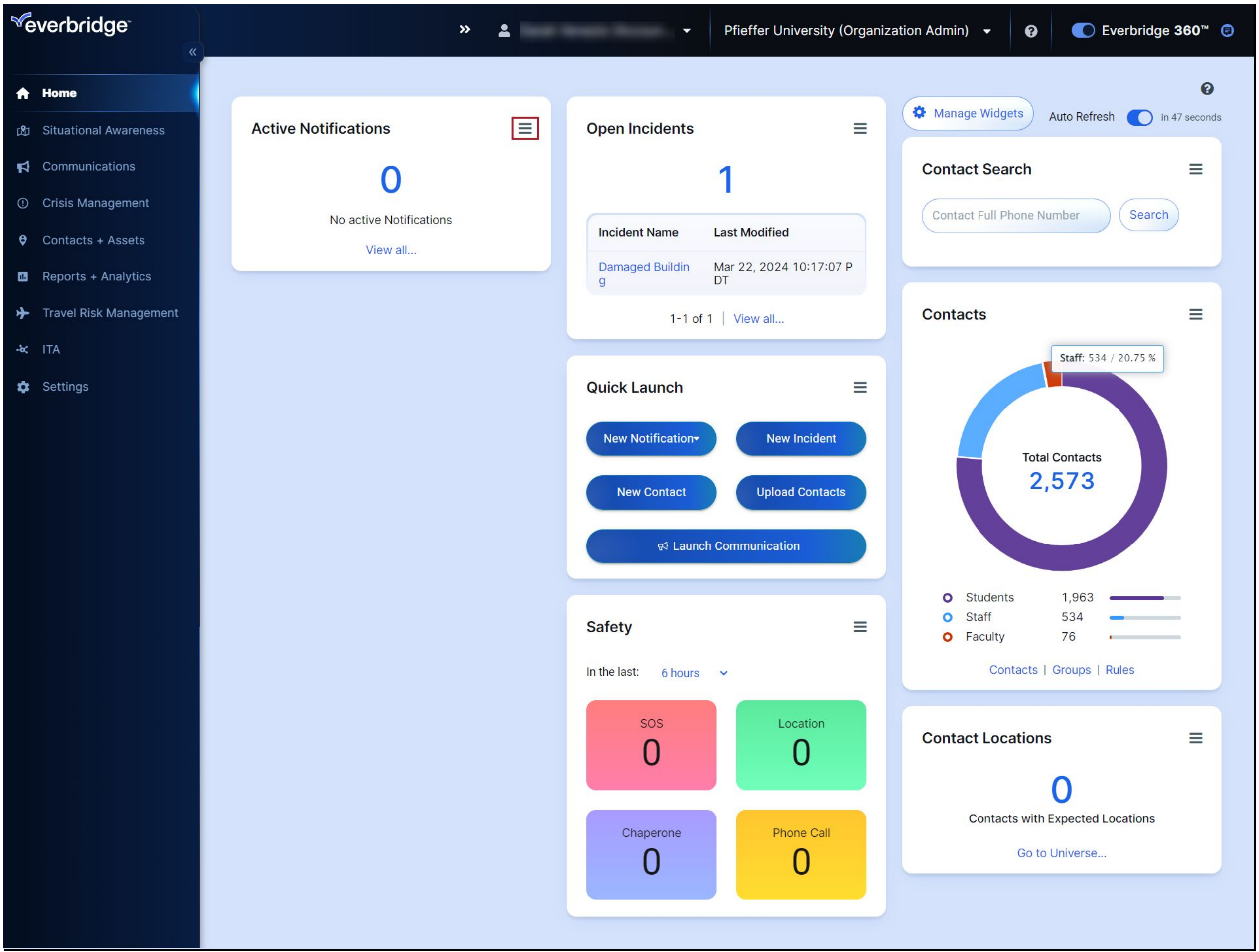
NOTE: The widgets you have available depend on your role.



Select the checkbox next to the name of the panel you want to include. Clear the checkbox next to the name of the panel you want to be excluded from the dashboard.

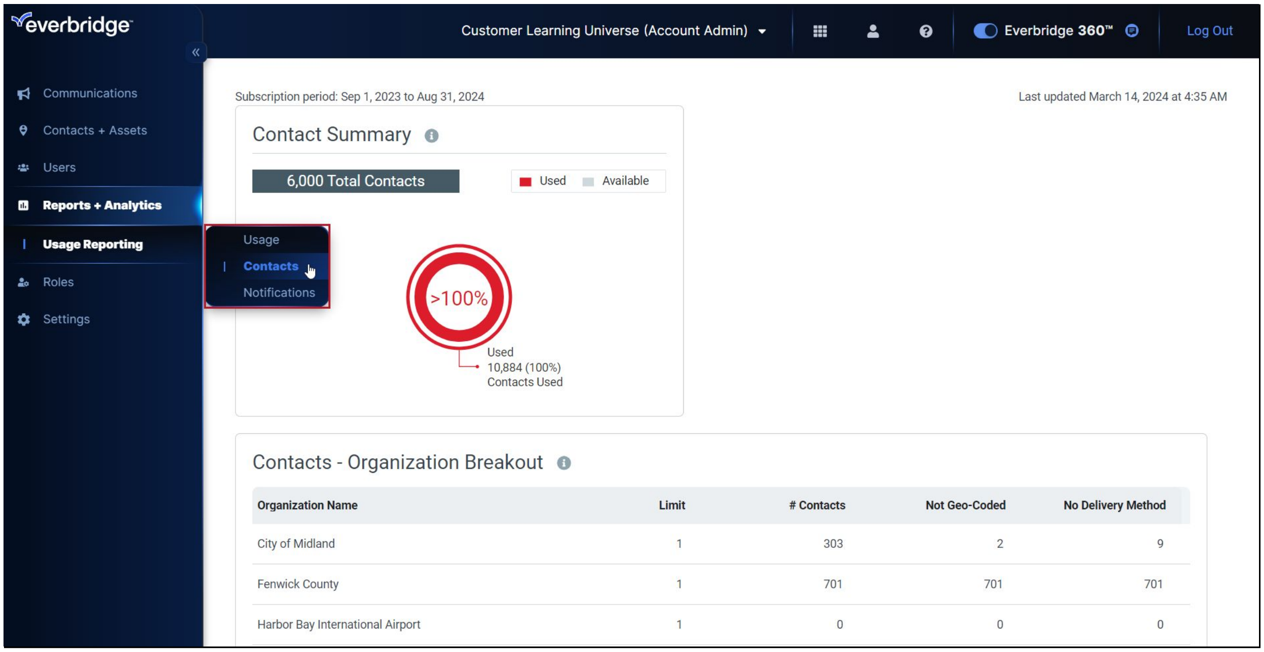
Customizing the Main Dashboard

Change the order of the panels by dragging the title bar of a panel to its new location. Click the desired title bar panel and while holding down the mouse button, drag the panel. You can also drag the panels between columns.



Usage, Contacts, and Notifications Dashboards at the Account Level

The **Usage**, **Contacts**, and **Notifications** dashboards provide visibility for Account Administrators on communication usage messages, contacts, and Notifications. From the Account level, select **Reports and Analytics,** and then **Usage Reporting** to access individual dashboards.



NOTE: If at least one of the Organizations within an Everbridge Suite account belongs to another customer, the Dashboard tab is not available at the Account level. In that case, the Usage, Contacts, and Notifications dashboards are available for each Organization.

If the Dashboard option or some of the sub-options are not available and the scenario mentioned in the note above does not apply, contact your Everbridge Account Manager.

Data in all Dashboard widgets refresh daily. The last update date and time are mentioned at the top right of each dashboard page.

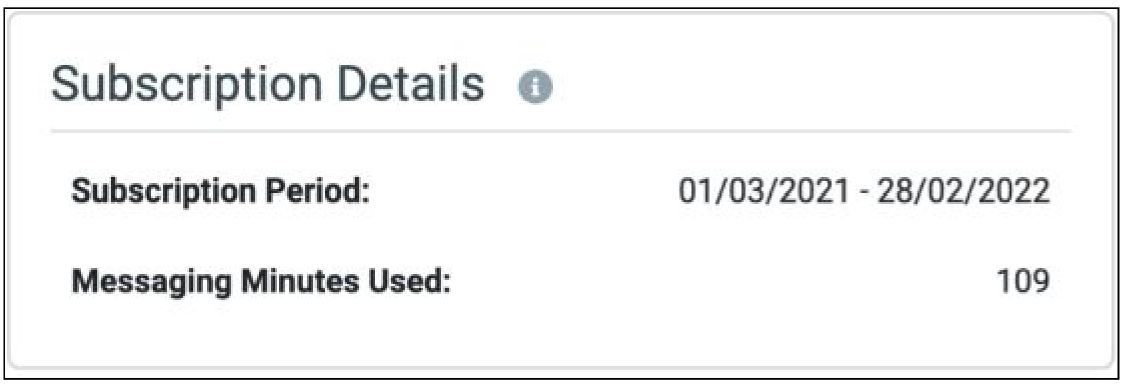
Usage Dashboard

Communications are measured either in **Messaging Minutes** or **Global Messaging Credits**. Depending on the metric attached to your Everbridge Suite account, use the relevant section below.

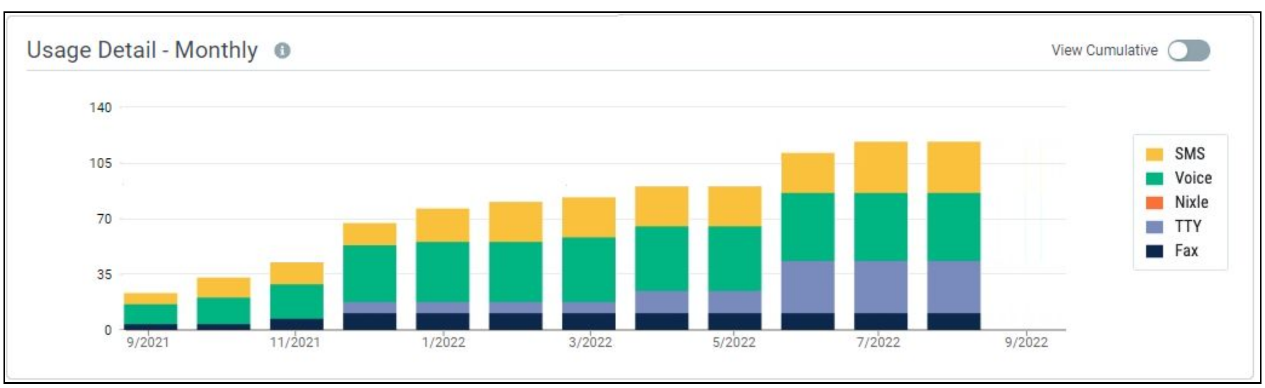
Messaging Minute Usage Dashboard

These widgets are only available to customers using the messaging minute metric for communication usage. All dashboard widgets report values for the current invoicing period. All numbers and periods are reset at the anniversary date of the invoicing period.

The subscription details widgets provide the current subscription period start and end dates and the messaging minutes used since the current subscription period start date.



The **Usage Detail** bar chart displays the monthly values, or the cumulative messaging minute usage broken down by delivery path:

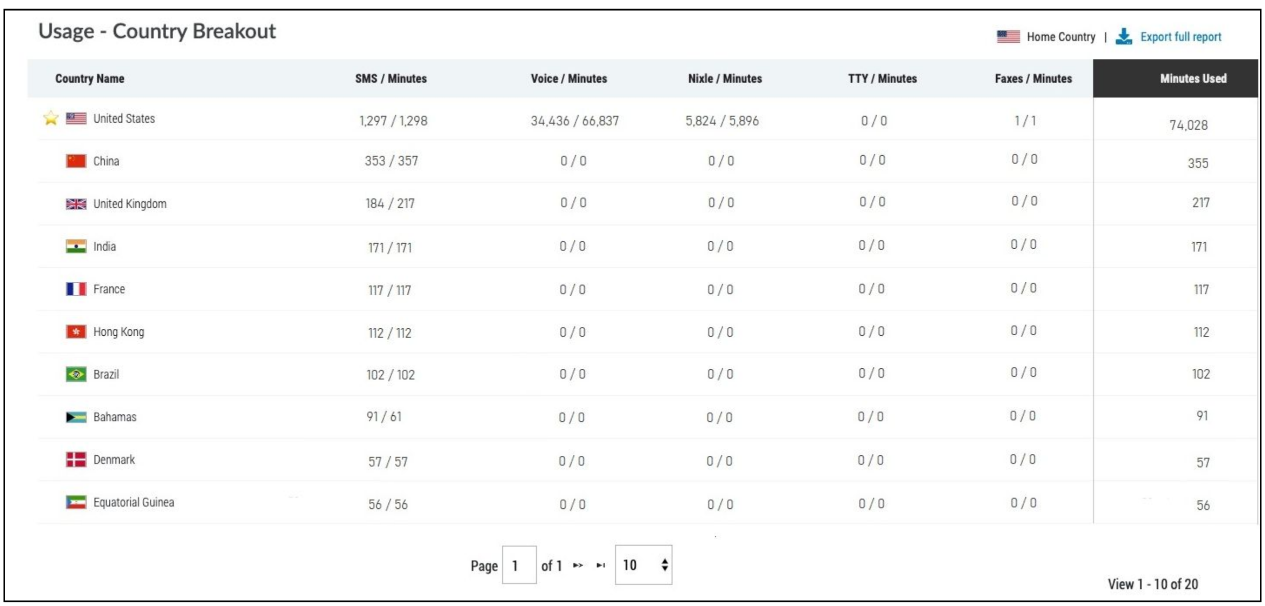


Use the **View Cumulative** toggle on the widget to switch from monthly values to the cumulative view.

The **Usage - Country Breakout** widget displays the total number of messages and messaging minutes for the current invoicing period per country. This table is sorted by consumption in descending order; countries consuming the greatest number of messaging minutes are shown at the top of the list.

Column Name	Description
Country Name	The name of each country. The home country is identified by an icon.
SMS / Minutes	The number of messages sent using SMS and the corresponding number of messaging minutes.
Voice / Minutes	The number of calls and conference calls and the corresponding number of messaging Minutes.
Nixle / Minutes	The number of SMS sent through Nixle Community Engagement and the corresponding number of messaging minutes.
TTY / Minutes	The number of TTY messages and the corresponding number of messaging minutes.
Faxes / Minutes	The number of faxes sent and the corresponding number of messaging minutes.
Minutes Used	The total number for messaging minutes for that country.

NOTE: The first number reported in each column is the number of messages. For SMS, a single message may be broken down in multiple SMS depending on its length and the character set used.


Usage - Country Breakout

Home Country | Export full report

Country Name	SMS / Minutes	Voice / Minutes	Nixle / Minutes	TTY / Minutes	Faxes / Minutes	Minutes Used
United States	1,297 / 1,298	34,436 / 66,837	5,824 / 5,896	0 / 0	1 / 1	74,028
China	353 / 357	0 / 0	0 / 0	0 / 0	0 / 0	355
United Kingdom	184 / 217	0 / 0	0 / 0	0 / 0	0 / 0	217
India	171 / 171	0 / 0	0 / 0	0 / 0	0 / 0	171
France	117 / 117	0 / 0	0 / 0	0 / 0	0 / 0	117
Hong Kong	112 / 112	0 / 0	0 / 0	0 / 0	0 / 0	112
Brazil	102 / 102	0 / 0	0 / 0	0 / 0	0 / 0	102
Bahamas	91 / 61	0 / 0	0 / 0	0 / 0	0 / 0	91
Denmark	57 / 57	0 / 0	0 / 0	0 / 0	0 / 0	57
Equatorial Guinea	56 / 56	0 / 0	0 / 0	0 / 0	0 / 0	56

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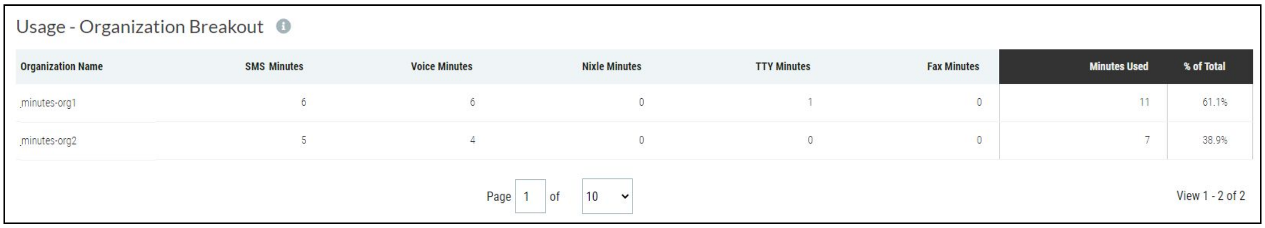
Data can be exported from that widget using the **Export full report** link at the top right of the widget. The data set exported contains additional details:

Column Name	Description
Organization Name	The name of the Organization.
Country	The country code.
SMS	The number of messages sent using SMS.
SMS Minutes	The number of messaging minutes generated by SMS.
Voice	The number of voice calls including conference calls.
Voice Minutes	The number of messaging minutes generated from calls.
Conference Calls	The number of conference calls.
Conference Call Minutes	The number of messaging minutes generated from conference calls.
Nixle Messages	The number of SMS sent through Nixle Community Engagement.
Nixle Minutes	The number of messaging minutes generated from SMS sent through Nixle Community Engagement.
TTY Messages	The number of TTY messages.
TTY Minutes	The number of messaging minutes generated from TTY messages.
FAX	The number of faxes sent.
FAX Minutes	The number of messaging minutes generated from faxes.

Email	The number of emails sent.
Mobile Push Alerts	The number of mobile push alerts sent.
Minutes Used	The total number for messaging minutes for that country.
Period	The month considered.

The **Usage - Organization Breakout** widget displays the messaging minute consumption for the current invoicing period per Organization broken down by delivery path. This table is sorted by consumption descending order; Organizations consuming the greatest number of messaging minutes are shown at the top of the list.



Usage - Organization Breakout

Organization Name	SMS Minutes	Voice Minutes	Nixle Minutes	TTY Minutes	Fax Minutes	Minutes Used	% of Total
minutes-org1	6	6	0	1	0	11	61.1%
minutes-org2	5	4	0	0	0	7	38.9%

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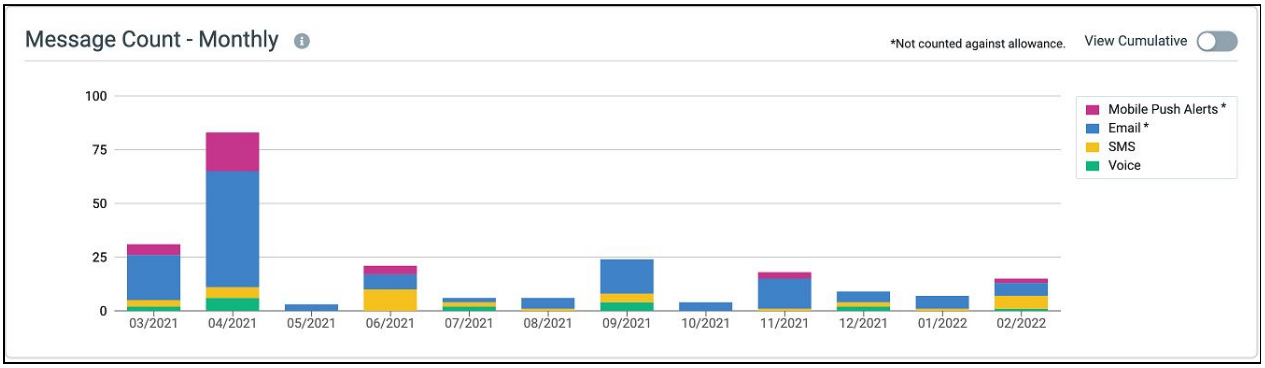
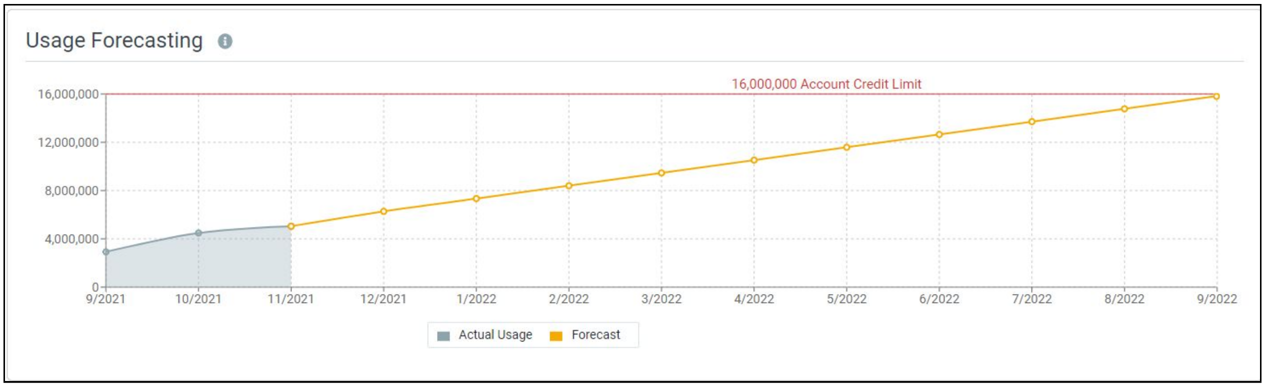
The **Message Count — Monthly** widget exposes the monthly count of messages, and for each month a breakdown by delivery method.



Use the **View Cumulative** toggle on the widget to switch from monthly values to the cumulative view.

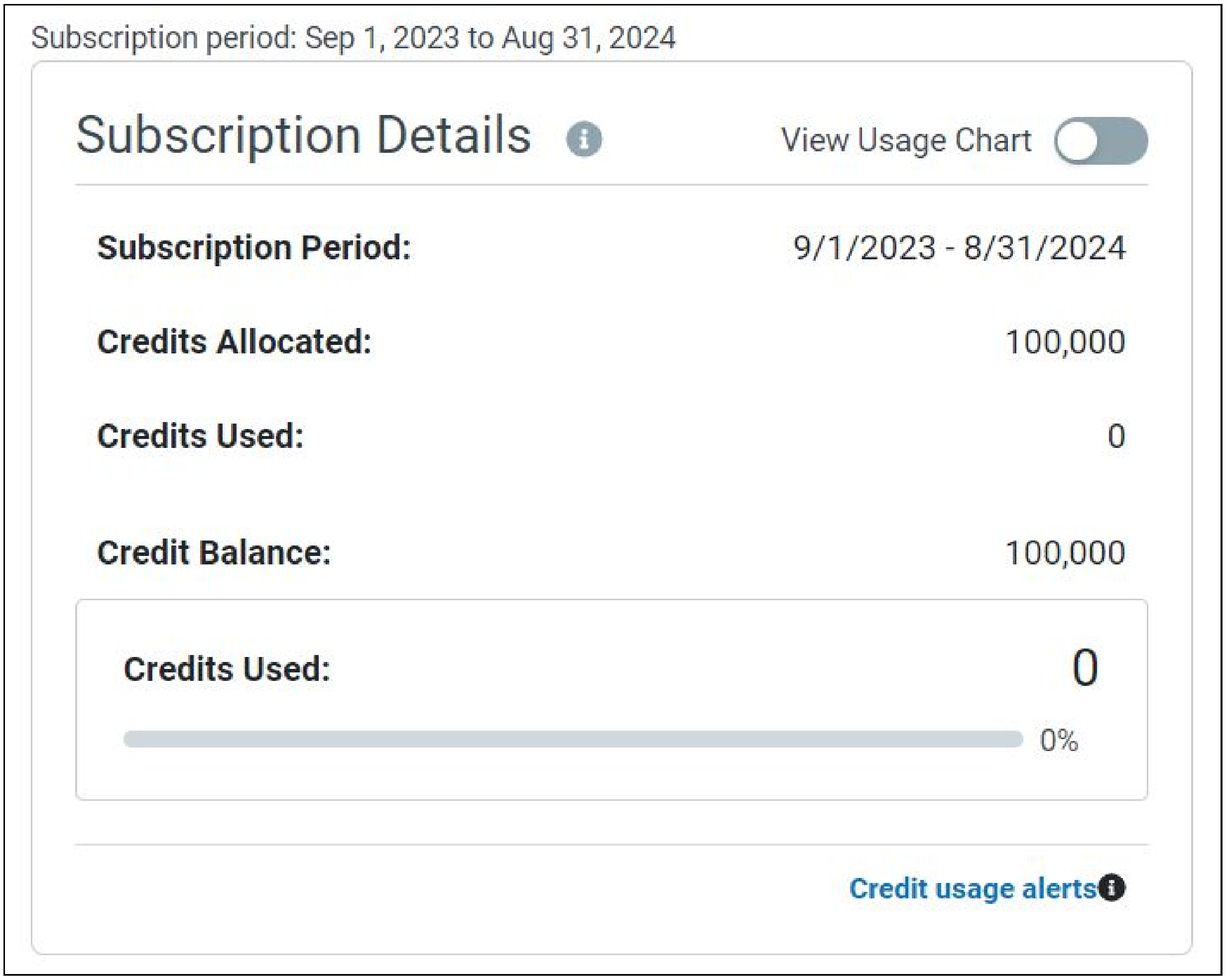
The **Usage Forecasting** widget exposes the current consumption in messaging minutes and projected one for the remaining of the subscription period. At least three months of data is needed for this simulation to be active.



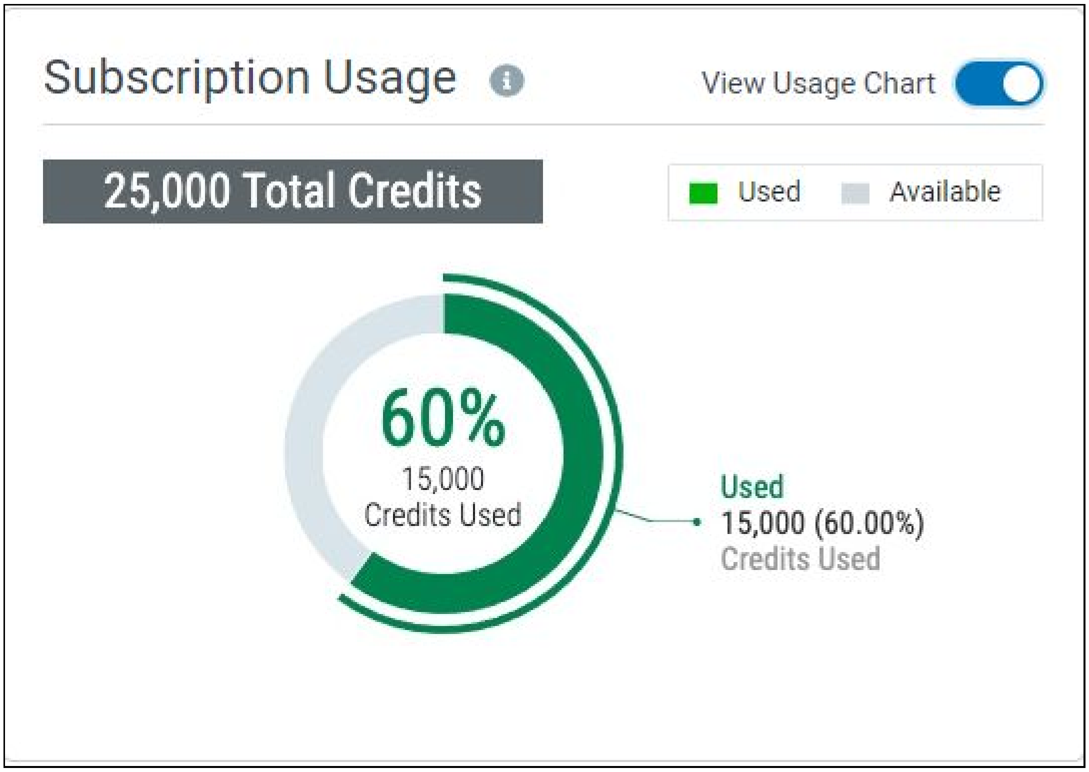
Credit Usage Dashboard

These widgets are only available to customers that are using the credit metric for communication usage. The credit metric always carries a limit. All dashboard widgets report values for the current invoicing period. All numbers and periods, including the limit are reset at the anniversary date of the invoicing period.

The subscription details widget provides overall figures for the subscription period. The credits allocated for that period include additional credits that may have been purchased.



The **View Usage Chart** toggle provides access to a donut chart representation of the subscription usage.



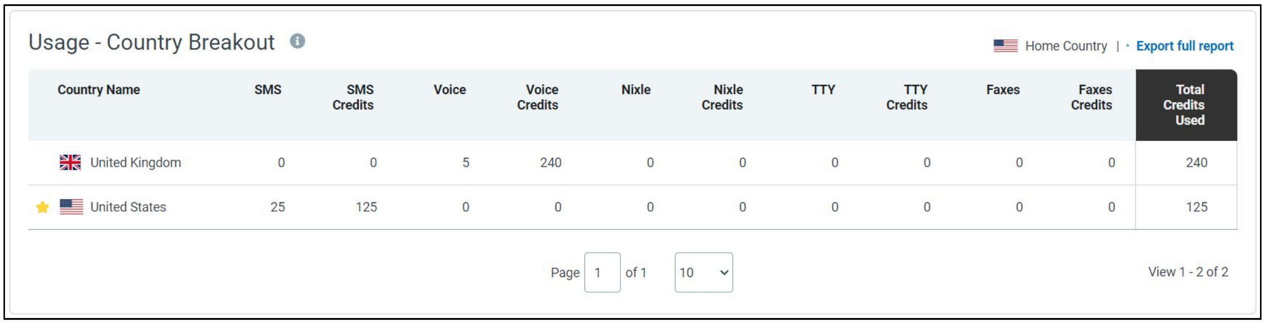
Use the **View Cumulative** toggle on the widget to switch from monthly values to the cumulative view.

The **Usage - Country Breakout** widget displays the total number of messages and credits for the current invoicing period per country. This table is sorted by consumption in descending order; countries consuming the greatest number of credits are shown at the top of the list.

Column Name	Description
Country Name	The name of each country. The home country is identified by an icon.
SMS / Credits	The number of messages sent using SMS and the corresponding number of credits.
Voice / Credits	The number of calls and conference calls and the corresponding number of credits.
Nixle / Credits	The number of SMS sent through Nixle Community Engagement and the corresponding number of credits.

TTY / Credits	The number of TTY messages and the corresponding number of credits.
Faxes / Credits	The number of faxes sent and the corresponding number of credits.
Credits Used	The total number for credits for that country.

NOTE: The first number reported in each column is the number of messages. For SMS, a single message may be broken down in multiple SMS depending on its length and the character set used.



Country Name	SMS	SMS Credits	Voice	Voice Credits	Nixle	Nixle Credits	TTY	TTY Credits	Faxes	Faxes Credits	Total Credits Used
United Kingdom	0	0	5	240	0	0	0	0	0	0	240
United States	25	125	0	0	0	0	0	0	0	0	125

Data can be exported from that widget using the **Export full report** link at the top right of the widget. The dataset exported contains additional details.

Column Name	Description
Organization Name	The name of the Organization.
Country	The country code.
SMS	The number of messages sent using SMS.
SMS Credit	The number of credits generated by SMS.
Voice	The number of voice calls (including conference calls).
Voice Credits	The number of credits generated from calls.
Conference Calls	The number of conference calls.
Conference Call Credits	The number of credits generated from conference calls.
Nixle Messages	The number of SMS sent through Nixle Community Engagement.

Nixle Credits	The number of credits generated from SMS sent through Nixle Community Engagement.
TTY Messages	The number of TTY messages.
TTY Credits	The number of credits generated from TTY messages.
FAX	The number of faxes sent.
FAX Credits	The number of credits generated from faxes.
Email	The number of emails sent.
Mobile Push Alerts	The number of mobile push alerts sent.
Credits Used	The total number for credits for that country.
Period	The month considered.

The **Usage - Organization Breakout** widget displays the number of messages and the corresponding credit consumption for the current invoicing period per Organization broken down by delivery path. This table is sorted by consumption in descending order; Organizations consuming the greatest number of credits are shown at the top of the list.

Usage - Organization Breakout

Organization Name	SMS	SMS Credits	Voice	Voice Credits	Nixle	Nixle Credits	TTY	TTY Credits	Fax	Fax Credits	Credits Used	Percen of Cr Consu
City of Midland	0	0	0	0	0	0	0	0	0	0	0	
Fenwick County	0	0	0	0	0	0	0	0	0	0	0	
Harbor Bay International ...	0	0	0	0	0	0	0	0	0	0	0	
Pfieffer University	25	125	5	240	0	0	0	0	0	0	365	
Rainier County	0	0	0	0	0	0	0	0	0	0	0	
Tower Global	0	0	0	0	0	0	0	0	0	0	0	
Winchester LLC	0	0	0	0	0	0	0	0	0	0	0	

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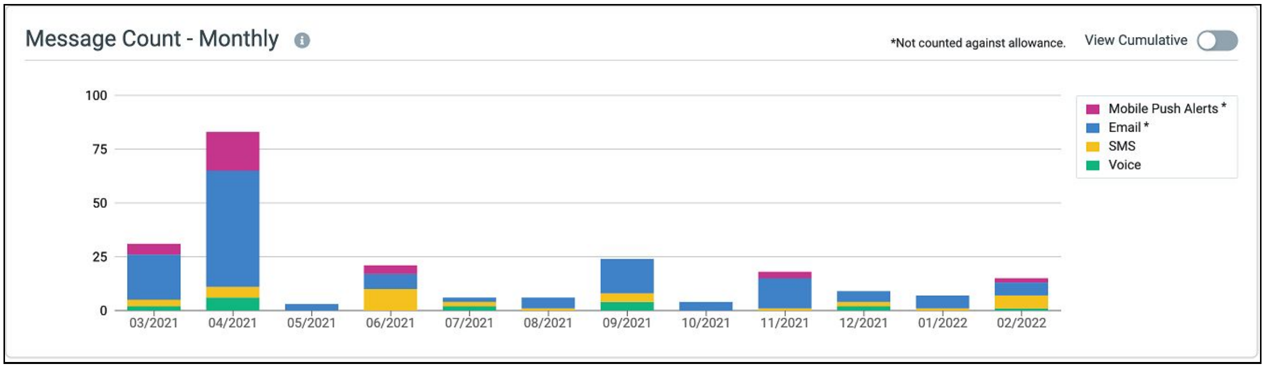
The **Message Count - Monthly** exposes the monthly count of messages, and for each month a breakdown by delivery method.



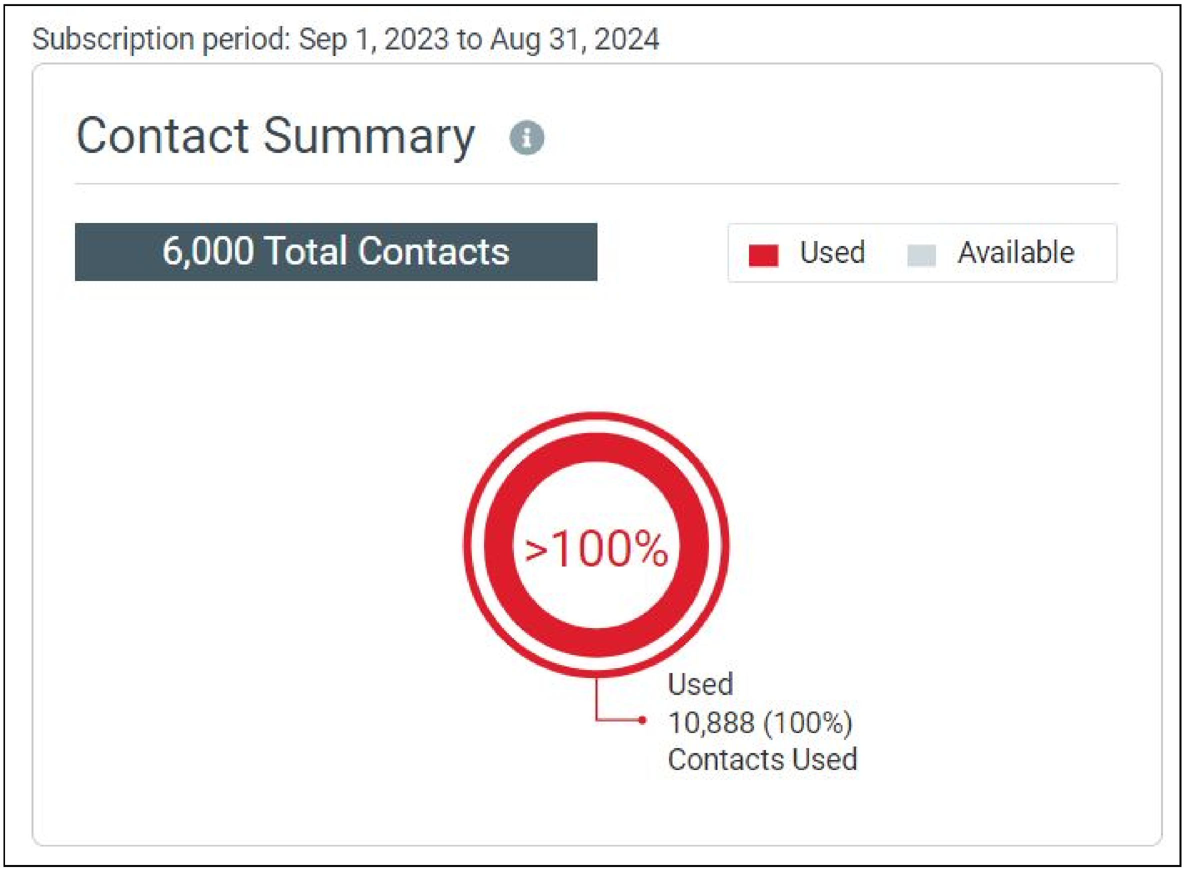
Use the **View Cumulative** toggle on the widget to switch from monthly values to the cumulative view.

The **Usage Forecasting** widget exposes the current consumption in credits and projected one for the remainder of the subscription period. At least three months of data are needed for this simulation to be active.

Contacts Dashboard

The **Contacts Dashboard** widgets report on the contact consumption at the Account level.

The **Contact Summary** widget is a donut-shaped chart that provides an overview of how many contacts available are left for the account.



The Contacts - Organization Breakout widget provides for each Organization:

- The contact limit that was set for this Organization.
- The number of active contacts related to that Organization.
- The number of non-geolocated contacts; contacts that do not have an address or that have an address that could not be geolocated with a latitude and longitude.
- The number of contacts that do not have any delivery method, such as phone number, email address, fax number, and so forth.

Contacts - Organization Breakout

Organization Name	Limit	# Contacts	Not Geo-Coded	No Delivery Method
Org 1	13,100	6,968	25	51
Org 2	16,900	10,032	30	39

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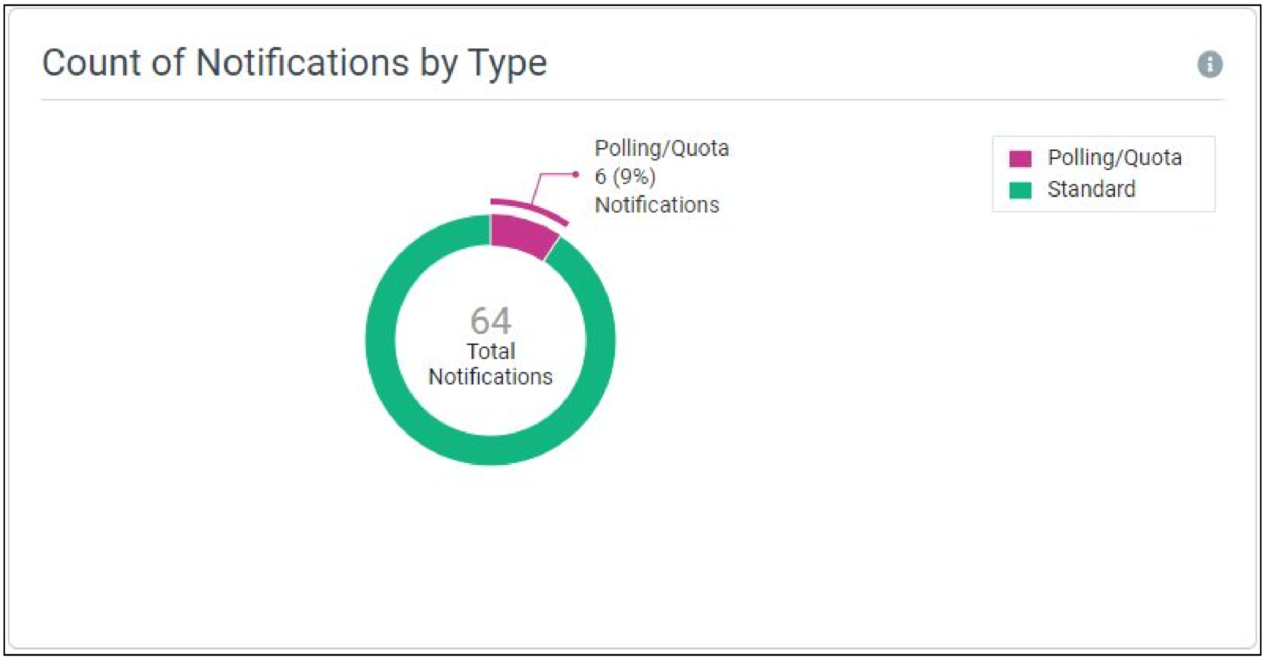
View 1 - 2 of 2

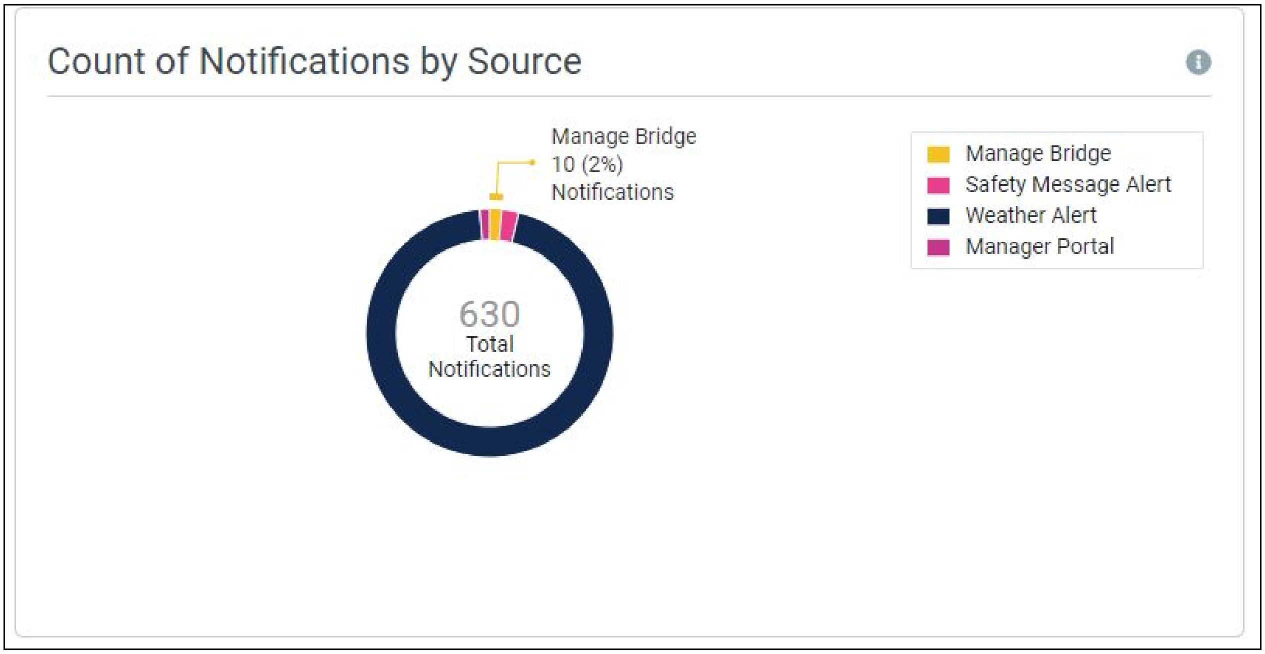
Notifications Dashboard

These widgets report on Notifications and related usage. Depending on the metric used, numbers are displayed in messaging minutes or credits. All Dashboard widgets report values for the current invoicing period. All widgets are reset at the anniversary date of the invoicing period.

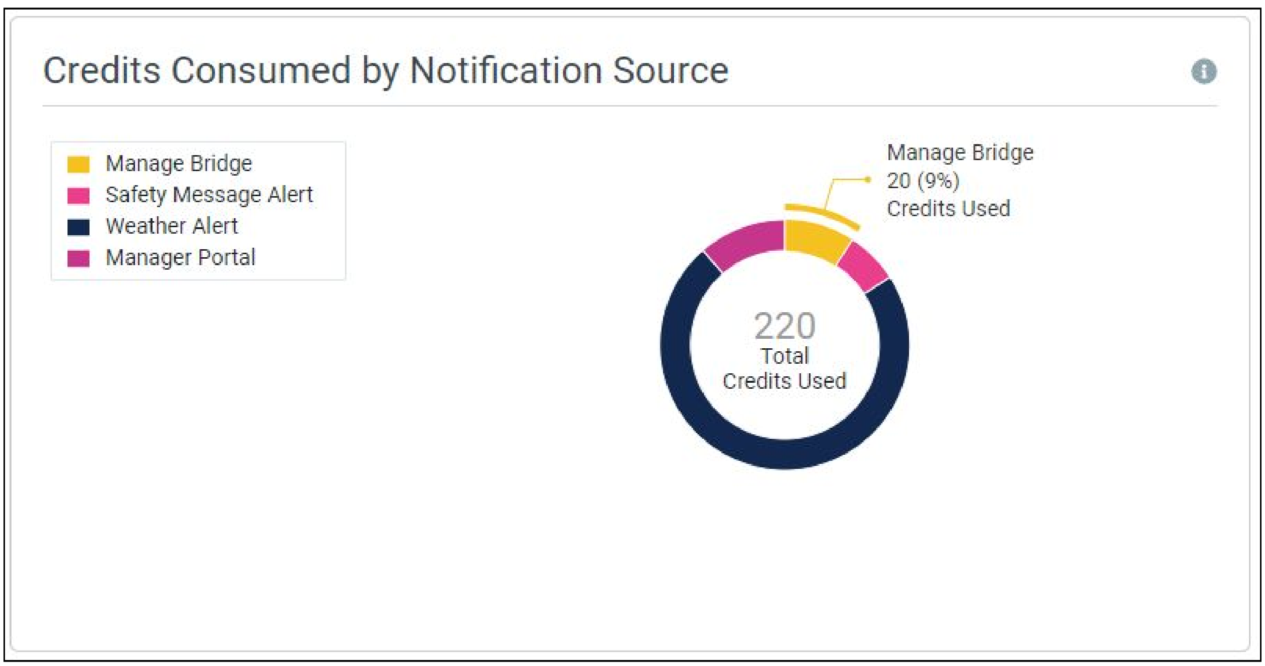
The **Count of Notifications by Type** widget is a donut chart summarizing how many Standard, Polling/Quota, or Conference Notifications have been created since the beginning of the invoicing period.



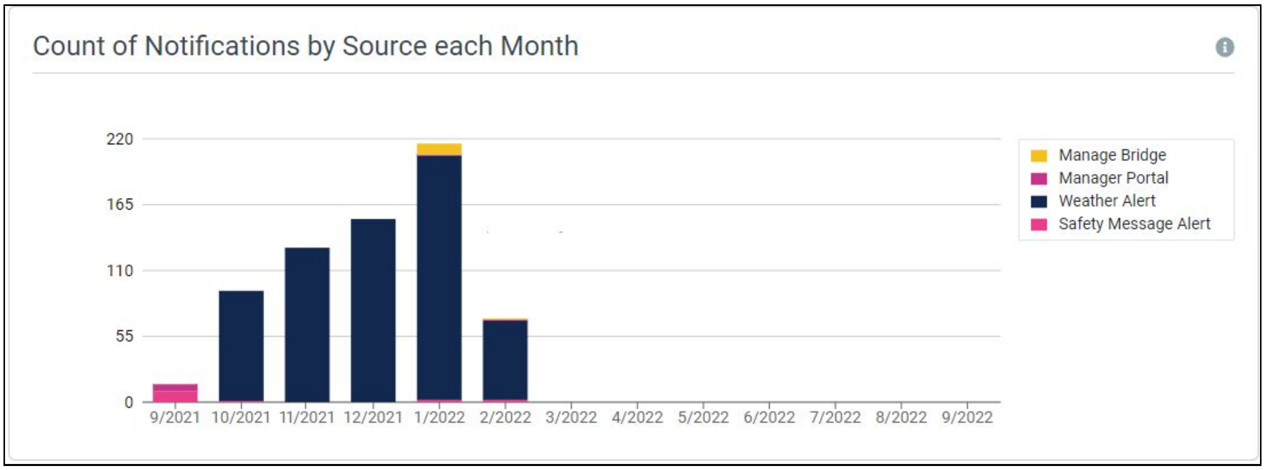
The **Count of Notifications by Source** widget is a donut chart summarizing how many standard Notifications have been created since the beginning of the invoicing period by source.



The **Credits Consumed by Notification Source** widget (or Messaging Minutes Consumed by Notification Source for customers using the Messaging Minutes metric) is a donut chart summarizing how many credits (or Messaging Minutes) are consumed by each notification source since the beginning of the invoicing period:

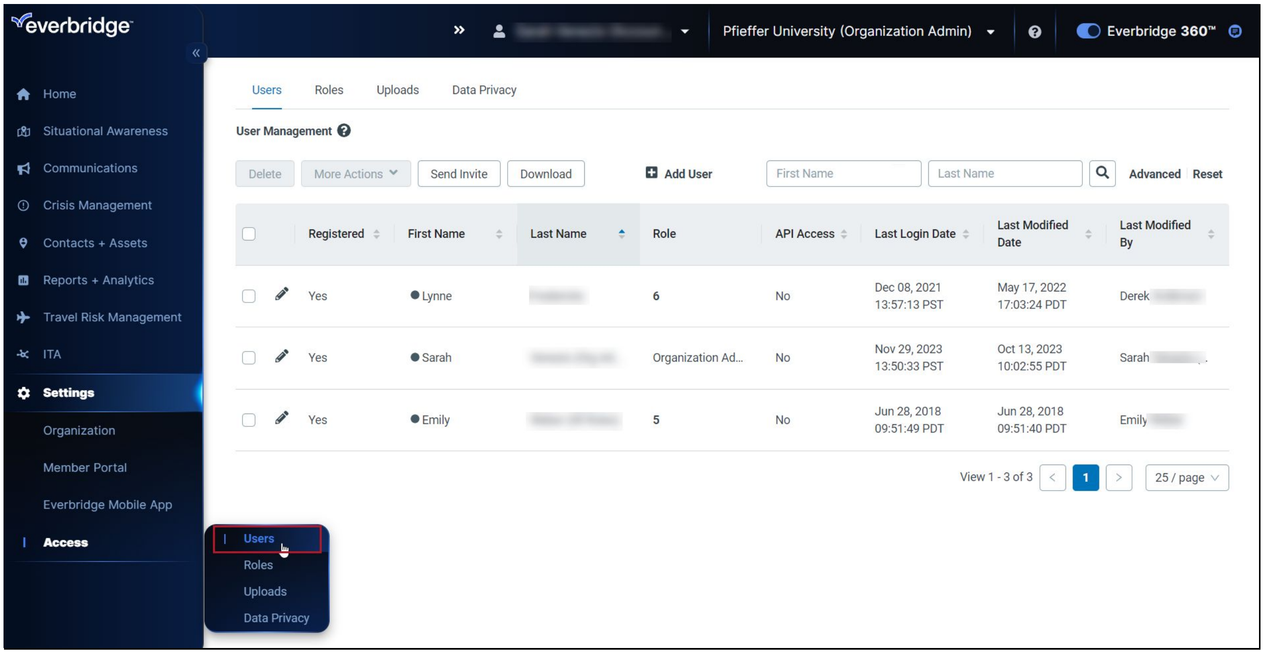


The **Count of Notifications by Source Each Month** is a bar chart summarizing how many notifications are created each month per notification source since the beginning of the invoicing period: The Credits Consumed by Notification Source each month (or Messaging Minutes Consumed by Notification Source each month for customers using the Messaging Minutes metric) is a bar chart summarizing how many credits (or Messaging Minutes) are consumed each month per notification source since the beginning of the invoicing period:



User Management

You can view and configure user profiles and settings for Accounts and Organizations from the **User Management** page. You can edit user profiles, enable or disable user accounts, lock and unlock user accounts, and delete users.



Searching for Users

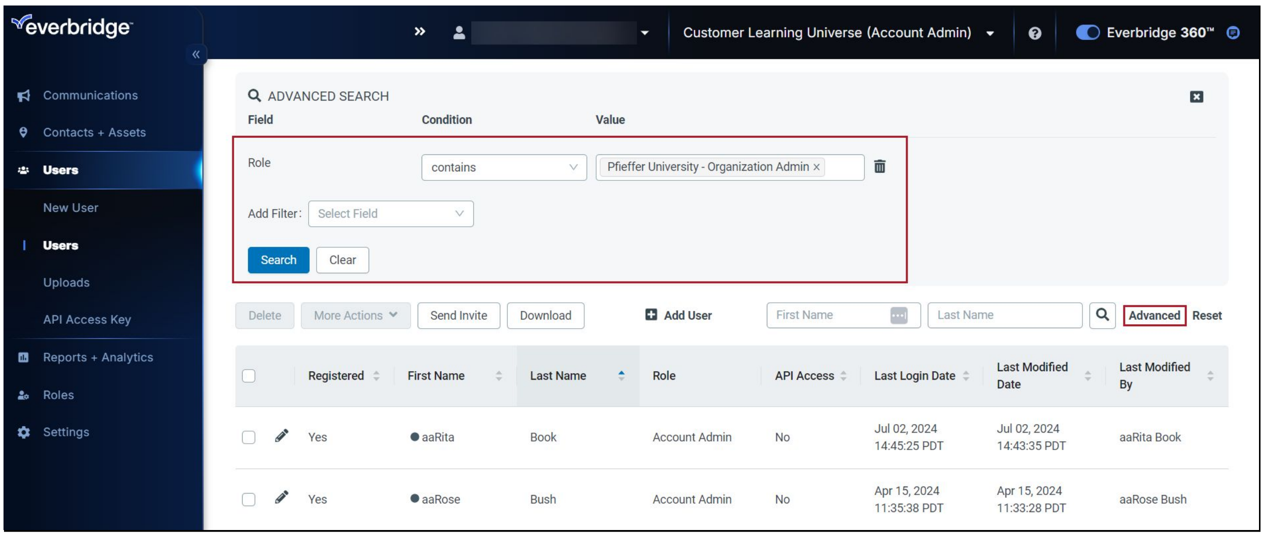
Use the basic **Search** functionality to filter for users via First Name, Last Name, or both.

Advanced Search

For a more granular approach, **Advanced Search** can locate users based on the following data points:

- First Name
- Last Name
- Middle Initial
- Suffix
- Email
- SSO User ID
- Linked Contact
- Created Date
- Last Updated Date
- Registration Invite Sent

- Registration Success Date
- Created By
- Last Updated By
- Role
- Registered
- Status
- Organization
- User Name
- Last Login Date
- API Access
- Locked

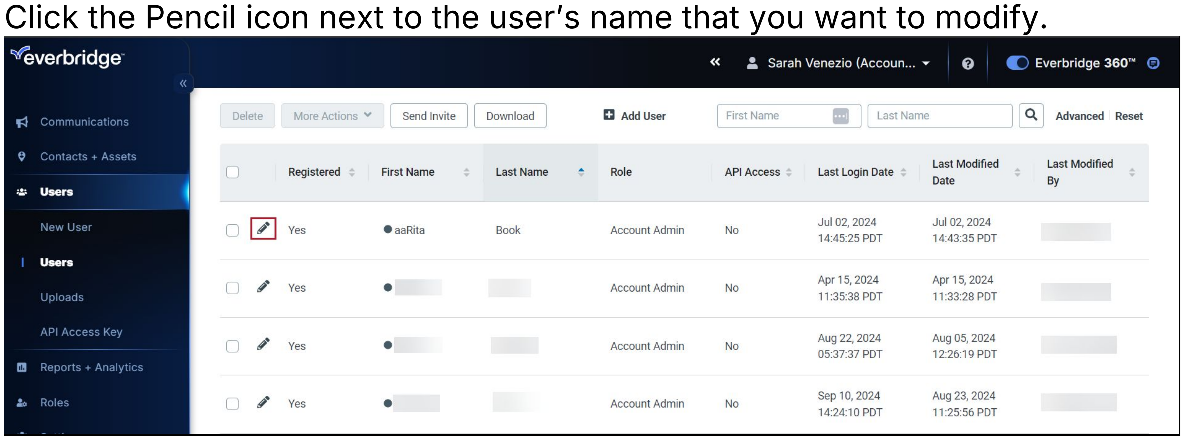


Advanced Search is particularly helpful for Administrators who, for example, may be looking to quickly identify users without assigned roles or SSO IDs for correction, or to locate locked users for further investigation and resolution.

Update a User Profile

To update a user profile:

1. Click the Pencil icon next to the user's name that you want to modify.

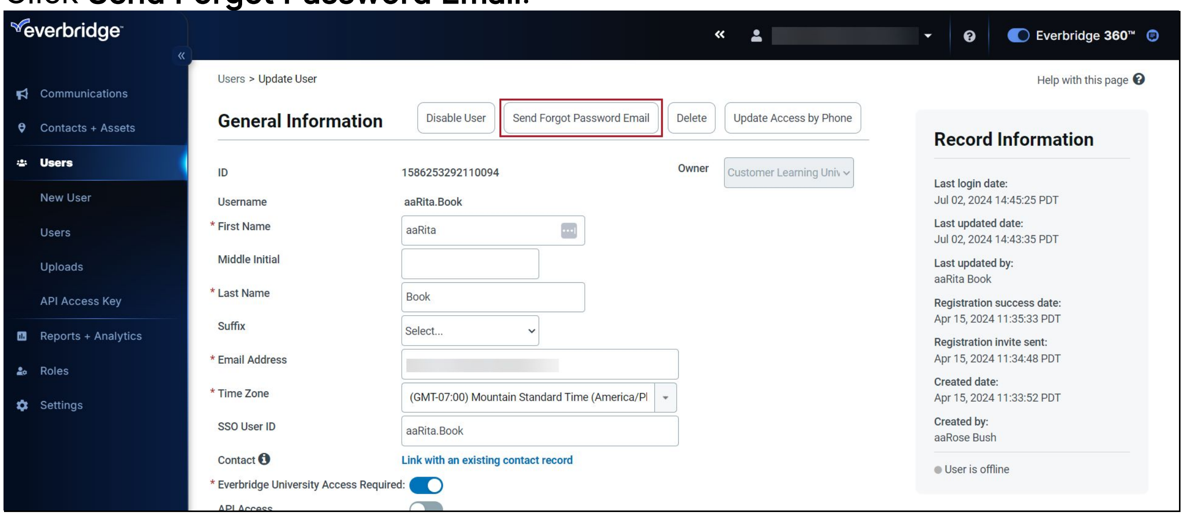


2. The **Update User** page appears. Make any changes to the user's profile in the **General Information** section or **Role Information** section. For more information about configuring a user's role information, read the Configure Role Permissions section.
3. Click **Save**.

Update a User Password

If a user forgets their password and needs to reset it:

1. Click the Pencil icon next to the user's name that you want to modify. The **Update User** page appears.
2. Click **Send Forgot Password Email**.



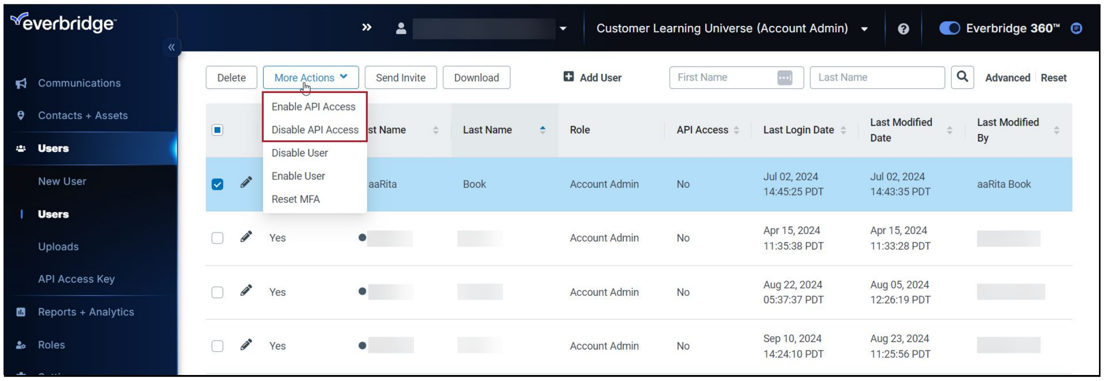
A success message will appear, and the system will send the user a temporary password valid for 72 hours. If the user does not reset the password within 72 hours, the temporary password expires and they must request the update password process be performed again.

Enable or Disable a User's API Access

Account Administrators can enable or disable API Access for specific users. To do this:

1. Select the checkboxes next to the names of the users you'd like to update.
2. Click **More Actions**. A drop-down menu will appear that includes the following options:
    - Enable API Access

- Disable API Access

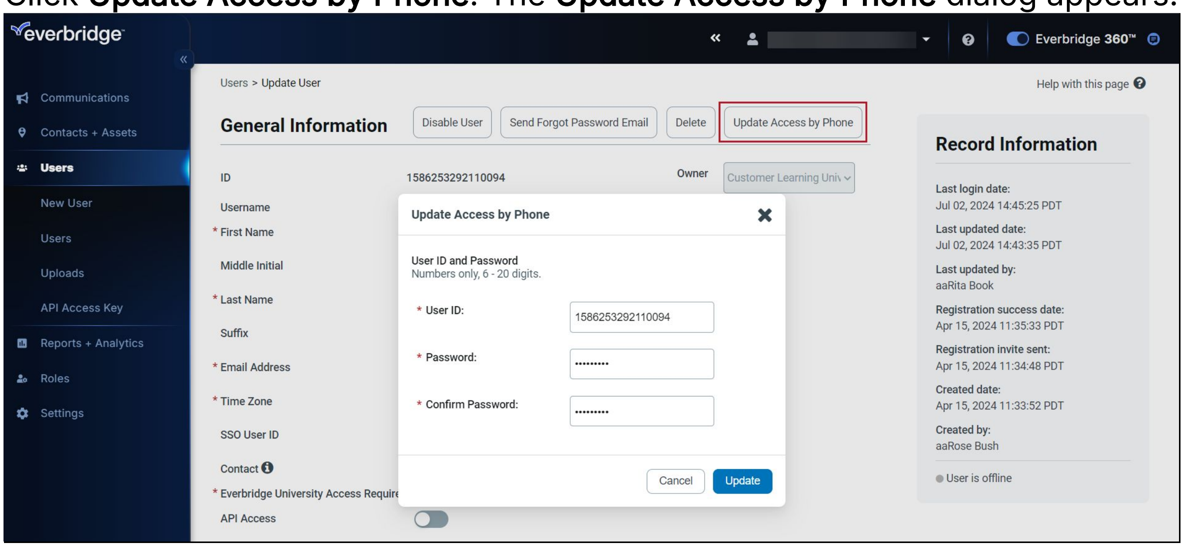


3. When disabling, a confirmation popup will appear and warn that API calls will be restricted for the selected user(s). Select **Disable** to continue.

Add a User's API to their Profile

You can add a user's API User ID to their profile, allowing the user to update their access by phone. To do this:

1. Click the Pencil icon next to the name of the user you want to modify. The **Update User** page appears.
2. Click **Update Access by Phone**. The **Update Access by Phone** dialog appears.



3. Type the user’s User ID. API user IDs consist of between six and 20 numbers.
4. Click the **Change Password** link, if needed. Type the Password and type it again to confirm.
5. Click **Update**.

Unlock an Account

Users may lock themselves out of their accounts if they try and fail more than three times to log in. The Lock icon next to the user's first name indicates that the user is currently locked out of the account.

To unlock an account:

1. Click the Pencil icon of the account you want to unlock. The **Update User** page appears.
2. Click **Unlock Account** in the banner at the top of the interface. The **Confirm** dialog appears.
3. Click **Unlock Account**.
4. Click **Save**.

Enable a User Account

Users with disabled accounts appear grayed out in the **Users** table. To enable a user with a disabled account:

1. Select the check box of the desired user.
2. Click the Pencil icon. The **General Information** page appears.
3. Click **Enable User**.
4. Click **Yes** to confirm.

Disable a User Account

To disable a user account so that they cannot log in, but without deleting their records:

1. Select the check box of the desired user.
2. From the **More Actions** menu, select **Disable User**.
3. Click Yes to **confirm**.

Delete a User

To delete a user:

1. Click the check box in the row containing the specific name.
2. Click **Delete**.
3. Click **Yes** to confirm.

You can also delete a user from the **Update User** page.

Add Users

Account and Organization Administrators with User Management permissions can add, edit, and delete users for their Account and its Organization. For example, you can add a user to an Organization that you want to serve as an Organization or Incident Administrator and then assign them that role. You can also create users and then assign those users different roles within an Organization.

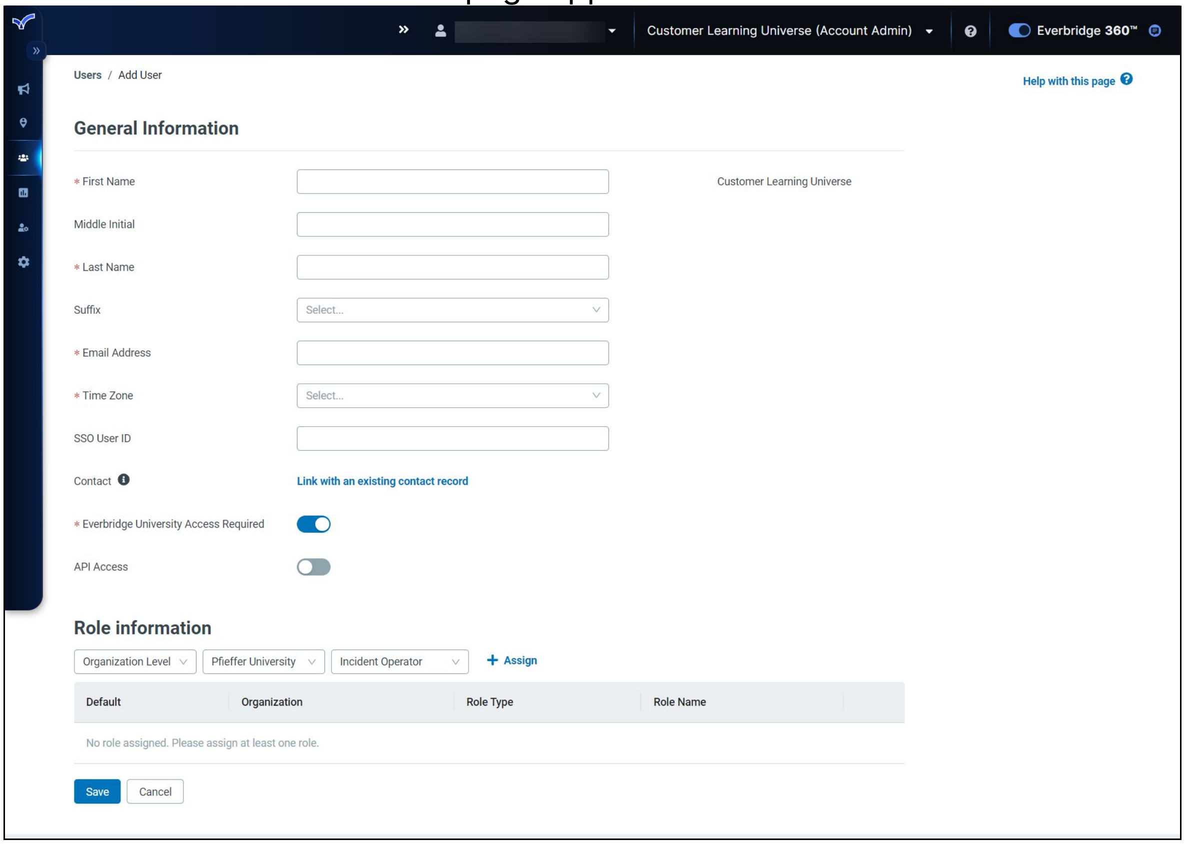
> **NOTE:** Only an Account Administrator can add, edit, or delete users for an Account at the Account level. The Account Administrator inherits all permissions of all user roles for all products assigned to the client. An Account Administrator can access all functionality available at both the Account level and the Organization level.

Add a User

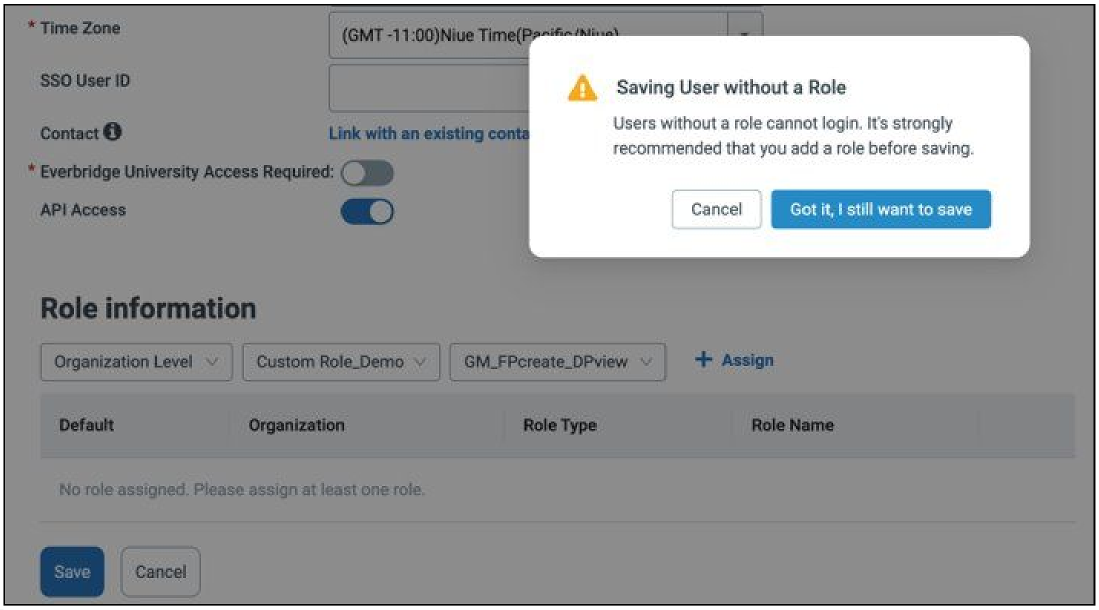
To add a user to an Organization:

1. Depending on your role, either:
    1. Log in as an Account Administrator and navigate to the **User** tab at the Account level.
    2. Log in as an Organization Administrator, navigate to the **Access** tab, and click **Users.**

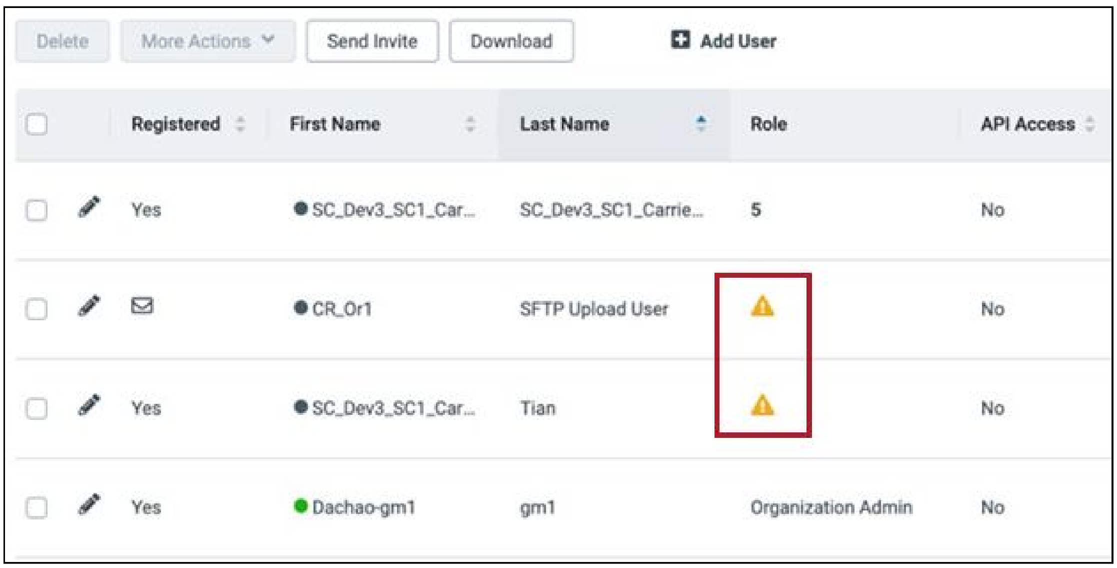
2. Click **Add User**. The **Add User** page appears.



3. Enter the required information in the fields of the **General Information** section.
   - **NOTE**: As an added security measure, the record can't be saved if a URL is entered into either the **First Name** or **Last Name** fields.
4. To configure Single Sign-On (SSO) functionality, type the user's SSO User ID in the **SSO User ID** field. For more information about SSO, see Single Sign-On for Manager and Member Portals.
5. To link the new user to an existing contact, follow the directions in the procedure Add User to Existing Contact.
6. Select **Yes** or **No** on the toggle to grant the user access to Everbridge University.
7. Select **Yes** or **No** on the toggle to grant API access to the user.
8. If adding from the Account level, In the **Role Information** section, select the level for the role from the drop-down list between either **Account Level** or **Organization Level**. If adding from the Organization level (or after selecting the Organization level from the drop-down list at the Account level) select the Organization name from the list.
   - For more information, see Assign Roles
9. Select the Role for this user from the menu.
10. Click **New Role** to add it.
11. Click **Save**. The new user is now on the list of users. If no role was assigned, then a popup warning will appear asking you to confirm that this was intentional before saving the user.



If a user is saved without a role, then they'll be accompanied by a warning icon in the Role column in the Users List view.

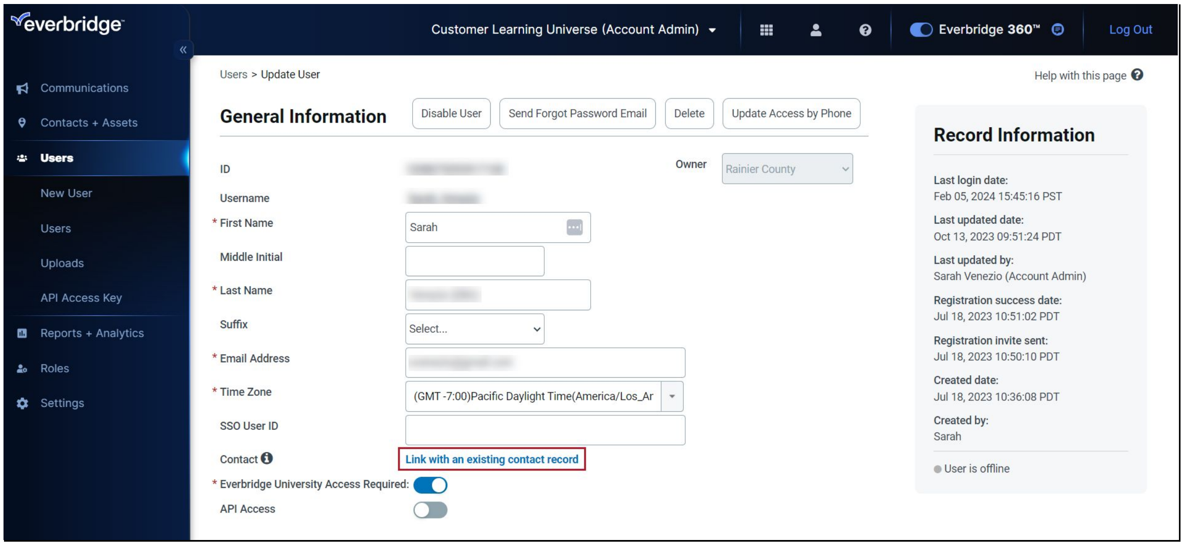


NOTE: The user can have multiple roles in an Organization. For more information, see Assign User Roles.

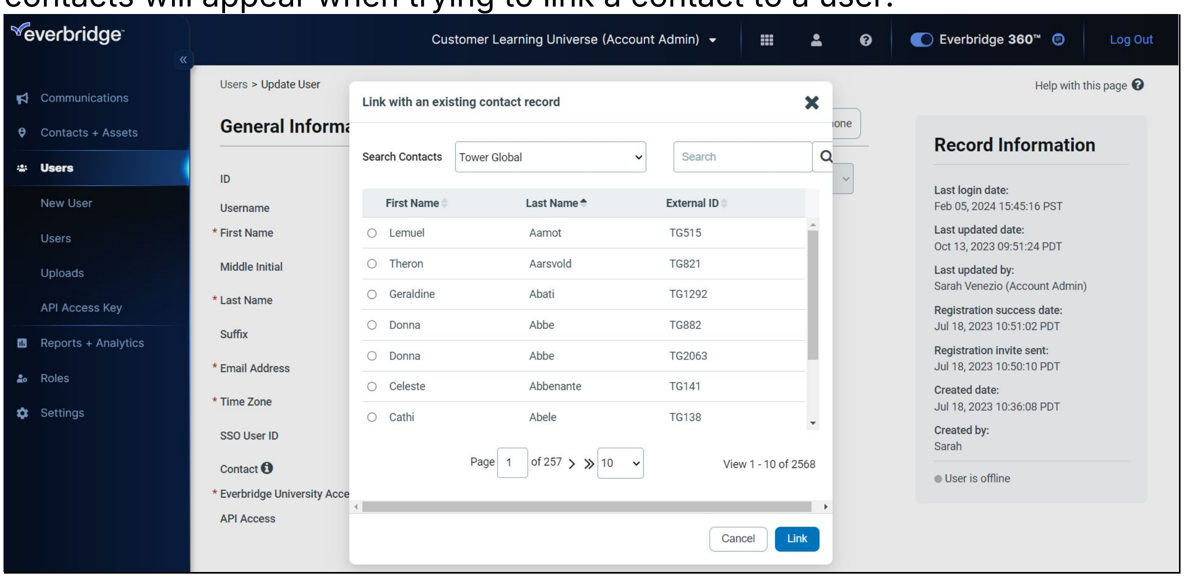
Add User to Existing Contact

When adding a user, you can link the account to a contact that already exists. Linking a user to their contact profile allows the user to leverage the Incident Chat feature on an active incident. To do this:

1. Click **Link with an existing contact record** in the **Contact** field to link the user record with a contact record. This is useful, for example, if you want to send messages just to your users. This contact record must already exist to link the record with the user.



2. From the **Search Contacts** menu, select the Organization that contains the contact record.
3. Search for the name of the contact. Both registered and unregistered contacts will appear when trying to link a contact to a user.



4. Select the record.
5. Click **Link**.

To delete the link between the record and the user, click the **Trash Bin** in the **Contact** field.

Register Users

After adding a new user, send them a registration email so that they can create an Everbridge user ID and password.

To send a registration email, perform either of the following actions:

- Select the checkboxes in the rows containing the users' names and click **Send Invite**.
  - If **Send Invite** is not displayed, select **Member Registration** from the **Send Invitation Email** menu.
- Click the Envelope icon in the row containing an individual user's name.

When the user receives the email, they can select the link to go directly to the Registration page.

> **NOTE:** User registration requests expire after 72 hours. If a user does not register within 72 hours, the link will no longer function, and they must request the Account Administrator resend the registration email.

Upload and Download Users

You can upload and download user records in a Comma-Separated Values (CSV) file. Use the CSV file as a starting point for making changes or restoring the user data. You can also upload users in bulk who require multiple roles in multiple Organizations.

The CSV Template

The CSV Template is a spreadsheet used to upload user records. It contains the exact headings required to successfully upload user records to Everbridge Suite.

If you use your own spreadsheet to upload user information, ensure that the column headings use the exact case-sensitive spelling and spaces. Do not change these column headings.

Organization Level

The table below contains the column headings for the CSV spreadsheet to use when uploading at the Organization level.

Field	Required	Comments
First Name	Y	N/A
Middle Initial	N	N/A
Last Name	Y	N/A
Suffix	N	N/A
Email	Y	N/A
SSO User ID	Y	Required for Single Sign-On (SSO) only.
API Access	N	Indicates whether the user should be granted API access.
External ID	Y	Required for **Links with an existing contact record.**
Role Names	N	• Roles are required with SSO uploads. • To upload multiple role names per Organization, separate the roles with the pipe (|) character. For example, **Dispatcher|Group Manager.** • The first role in the **Role Names** column will be set as the default role.
END	N	It is recommended to include **END** at the end of every row.

Account Level

The table below contains the column headings for the CSV spreadsheet to use when uploading at the Account level.

Field	Required	Comments
First Name	Y	N/A
Middle Initial	N	N/A
Last Name	Y	N/A
Suffix	N	N/A
Email	Y	N/A
SSO User ID	Y	Required for Single Sign-On (SSO) only.
API Access	N	Indicates whether the user should be granted API access.
External ID	Y	Required for **Links with an existing contact record.**
External ID ORG	N	The Organization associated with the user's contact information.
Org Name 1	Y	Required if the **Role Name 1** and **External ID** fields contain information.
Role Names 1	N	• Roles are <u>required</u> with SSO uploads. • To upload multiple role names per Organization, separate the roles with the pipe (|) character. ◦ For example, **Dispatcher|Group Manager** • The first name in the **Role Names 1** column will be set as the default role.
Org Name 2	N	• You can designate an Organization with no defined Role. • Required if you add an **External ID** value.
Role Names 2	N	• You <u>cannot</u> have a role without an Organization. • Roles are <u>required</u> with SSO uploads. • To upload multiple role names per Organization, separate the roles with the pipe (|) character. ◦ For example, **Dispatcher|Group Manager**
END	N	It is recommended to include **END** at the end of every row.

Download a CSV Template

To download a CSV Template:

1. From the Account level, navigate to **Users** > **Uploads.** From the Organization level, go to **Access** > **Uploads**.
2. Click **Download Template.**
3. Open the file.

NOTE: If a text field contains suspicious content (for example, strings that start with = + - @ “ and when - or + are followed by a number), Everbridge Suite downloads the CSV-formatted file with a .txt file type.

Download User Records

To download user records:

1. Select the check box for each contact whose records you want to download.
2. Click **Download**.
3. Save the file to your local computer.

To download records for all users, clear all records' checkboxes and then click **Download.**

Upload User Records

To upload user records:

1. Click **Upload to Portal**. The **Upload Users** dialogue box appears.
2. Click **Upload Users**. A file manager page appears.
3. Select the .csv file to upload.
4. Click **Upload to Portal**. A dialog that indicates the file is uploading appears.
5. Click **OK**.

Overview of User Roles

User roles are assigned access to specific parts of Everbridge Suite based on what they need to do. This guide explains the tasks that you can perform in Everbridge Suite as the role listed below.

> **NOTE:** This section describes the functionality of Everbridge's Legacy Roles. To learn how to create Custom Roles by using these Legacy Roles as a starting point, see the Custom Roles Guide.

Account Administrator

Account Administrators are the "super users" of Everbridge Suite. This role is typically used for the following tasks:

- **Configuration** - This can include configuration for Account or Organization Settings, as well as for the Permissions and Roles that define general system access.
- User Management - Users of the Everbridge Manager Portal need to be added to the system and given roles that reflect their responsibilities. In addition, users may potentially need to be disabled, deleted or get assistance with passwords.
- **Enabling API Access** - API access to an account and all of the Organizations included in it needs to be enabled before information can be shared.
- **Cross-Organizational Communications** - Each account has any number of individual Organizations beneath it. Functions that need to occur or information that needs to be shared across all of the Organizations, are the responsibility of the Account Administrator.

Account Administrators also have access to all Organizations in an Account and are often responsible for configuration at that level, as well. To do so, this role must be logged in as an Organization Administrator in the appropriate Organization.

Organization Administrator

Organization Administrators are responsible for specific Organizations. They have a high level of permissions and access to a specific Organization within Everbridge Suite. They configure and define the Everbridge Suite experience for the Organization's users and contacts.

Organization Administrators can access the **Dashboard**, **Universe**, **Notifications**, **Incidents**, **Contacts**, **Reports,** and **Settings** tabs. From these tabs they can:

- Configure Organization settings.
- Add and manage users.
- View dashboard panels.
- Select contacts for a Notification or Incident by Individuals, Groups, and Rules, as well as in a geographic area from the **Universe** map.
- Create, manage, send, and delete Notifications, Notification Templates, and Message Templates.
- Create, manage, send, and delete Incidents, Incident Templates, and Scenarios.
- Add and maintain Contacts and Groups.
- View, create, edit, and delete Reports.

IMPORTANT: For information about performing tasks as an Organization Administrator, see the Everbridge Suite User Guide.

Incident Administrator

An **Incident Administrator** manages Incident communication for Organizations. They can access the **Incidents**, **Dashboard**, **Contacts**, and **Reports** tabs. From these tabs they can:

- Create, manage, send, and delete Incidents, Incident Templates, and Scenarios.
- View dashboard panels.
- Add and maintain Contacts, Groups, and Rules.
- View, create, edit, and delete reports, excluding Notification Reports.

Group Manager

A **Group Manager** manages groups of contacts within an Organization. They can also send Notifications to predefined sets of contacts within assigned groups. Group Managers can access the **Dashboard**, **Universe**, **Notifications**, **Contacts**, and **Reports** tabs. From these tabs they can:

- View dashboard panels.
- Select contacts for a Notification by Individuals, groups, and Rules, as well as in a geographic area from the **Universe** map.
- Create, manage, send, and delete Notifications, Notification Templates, and Message Templates.

- Add and maintain Contacts, Groups, and Rules. They cannot, however, upload files with contact information.
- View, create, edit, and delete some reports.

Dispatcher

A **Dispatcher** can send Notifications. They can also create and manage Notification templates and manage scheduled Notifications and active Notifications. Dispatchers can access the **Dashboard**, **Universe**, and **Notifications** tabs. From these tabs they can:

- View dashboard panels.
- Select contacts for a Notification by Individuals, Groups, and Rules, as well as in a geographic area from the **Universe** map.
- Create, manage, send, and delete Notifications, Notification Templates, and Message Templates to specified contacts.

Data Manager

A **Data Manager** manages contact records. Data Managers can access the **Settings**, **Contacts,** and **Reports** tabs. From these tabs they can:

- Add and maintain Contacts, Groups, and Rules.
- Configure Contact and Group settings.
- View, create, edit, and delete reports.

Mass Notification Operator

A **Mass Notification Operator** sends predefined Notification templates and can manage active Notifications. Mass Notification Operators can access the **Notifications** tab.

Incident Operator

An **Incident Operator** launches and manages Incidents. Incident operators can access the **Incidents** tab.

Assign Roles

Everbridge Suite allows you to assign user roles at the Account Level and the Organization Level.

The Account Level is the top level of all implementations. Each Everbridge Account has at least one Organization configured in it, and an Account can have many Organizations. The only role that can access the Account Level is the Account Administrator.

Each Organization has its own contacts and operates independently. There are many roles at the Organization Level, and users have access to components of the system depending on their role.

When you assign roles to users within an account or an Organization, you grant these users access to certain parts of Everbridge Suite. This allows the users to perform specific tasks and access certain aspects of the system. Access to contact lists, templates, and reports are role specific.

For example, you could assign a city employee who is tasked with sending severe weather Notifications to all of the city's citizens the Dispatcher role.

Account Level

An Account Administrator is the overall system administrator. The Account Administrator inherits the permissions of all user roles for all products assigned to the client. This role is typically used for user management, security configurations, and other top-level procedures.

The following table contains the tabs in the Everbridge Manager Portal that an Account Administrator can access and the actions they can perform.

Tab	Action
Notifications	Send Notifications to contacts in any Organization.
Contacts	Upload contacts into any Organization.
Users	Add, edit, delete, and enable/disable users in any Organization.
Roles	Assign permissions and resources to the users added/managed under the User Management tab.

Account Settings	• Notifications - Specify settings that are applied to all Notifications in all Organizations. • Contacts - Specify settings that are applied to all contacts and groups in all Organizations. • Single Sign-On.
Access	User and Role Management.
Dashboard	View dashboards.

Organization Level

At the Organization Level, the following roles are available to assign:

- Organization Administrator — Responsible for an Organization. Organization Administrators can access all functionality available to the Organization.
- Incident Administrator — Manages incident communication for the Organization. Incident Administrators can access the **Incidents**, **Dashboard**, **Contacts**, and **Reports** tabs.
- Group Manager — Manages and sends Notifications to predefined sets of contacts within assigned groups. Group Managers can access the **Dashboard**, **Universe**, **Notifications**, **Contacts**, and **Reports** tabs.
- Dispatcher — Manages and sends Notification templates, and manages scheduled Notifications and active Notifications. Dispatchers can access the **Dashboard**, **Universe**, and **Notifications** tabs.
- Data Manager — Manages contact records. Data Managers can access the **Settings**, **Contacts,** and **Reports** tabs.
- Mass Notification Operator — Sends predefined Notification templates and can manage active Notifications. Mass Notification Operators can access the **Notifications** tab.
- Incident Operator— Launches and manages incidents. Incident operators can access the **Incidents** tab.

The following table contains the tabs the roles can access and their descriptions.

Tab	Description
Access	Manage users and roles. This tab is only displayed if Organization Administrators receive permission to manage users and roles.
Dashboard	View dashboards. Dashboards provide visibility on contacts, communication messages, and Notifications.

Universe	Select contacts for a Notification in a geographic area. For example, send a Notification from the **Universe** to contacts that you select on the map. You can find contacts using the **Select Contacts** menu, or see existing Contact information by clicking a Contact symbol on the map.
Map	View contacts based on their last known location. For example, you can see the last known location and expected location of a contact. For more information about maps, see Map Settings.
Notifications	Create, manage, send, and delete Notifications, Notification Templates, and Message Templates. For example, edit and delete existing Notification Templates, manage active Notifications, and Create a new Notification. For more information about Notifications, see Notifications.
Incidents	Create, manage, send, and delete Incidents, Incident Templates, and Scenarios. For example, in this section, create, edit, and delete Scenarios, view all Incidents, and launch and manage Incidents. For more information about Incidents, see Incidents.
Contacts	Add and maintain Contacts and groups. Contacts can be assigned to groups. An Organization sends Notifications to its own contacts. Select one or more groups to receive a Notification. For more information, see Contacts.
Reports	View, create, edit, and delete reports. For example, you can view Scenario reports, create Incident reports, and edit Contact Custom Reports. For more information about reports, see Notification Quick Reports.
Settings	Use this section to configure settings for the Organization, such as for users, contacts, Incidents, and Notifications. For example, you can configure Contacts

	and Groups, secure messaging, and mobile Notification opt-in for your contacts. For more information about Organization Settings, see Organization Level Settings.

Assign a Role

When assigning a role to a user, make certain to click the **Permissions** tab to view all of the tasks that role can perform. This will help determine whether the role to assign a user is appropriate for their Level of access. A new Organization only contains the Organization Administrator role.

To assign a role to a user:

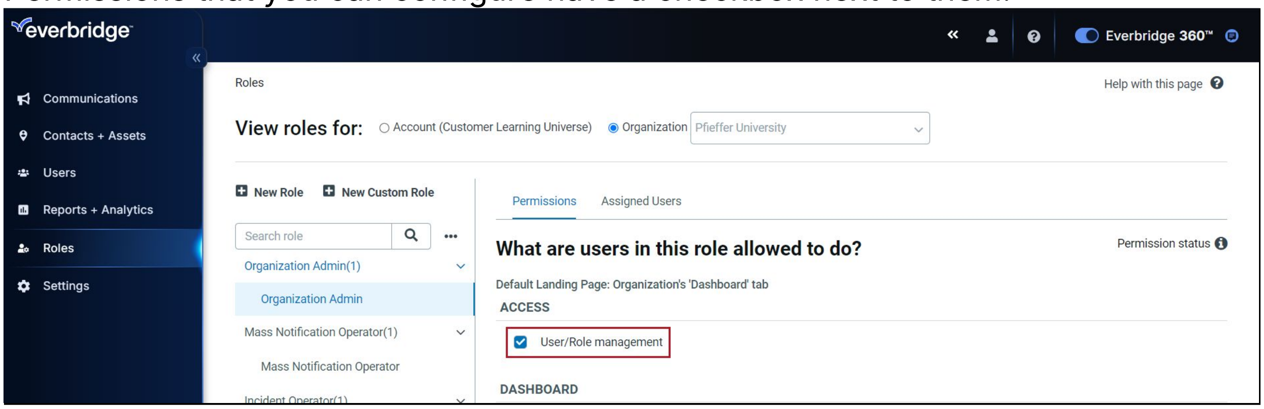
1. Click **Roles**.
2. Select the Organization from the menu.
3. At the top of the **Role Type** list, click **New Role**.
4. In the **Name** field, type a name for the new role. The role name cannot include a pipe character (|).
5. Select a role type from the **Type** menu. The role type becomes a folder that contains the custom roles to add.
6. Click **Permissions** to view the permissions for this role.
7. Click **Resources**.
8. Select **Limited Access** to limit access to one or more specific templates the role uses. A list of templates for the Organization appears.
9. Select the check boxes for the templates the new role can access and click **Save**.

NOTE: You can only edit permissions for two roles. For Organization Administrators, select the check box for User and Role management. This allows Organization Administrators to be assigned other roles within the Organization. For Group Managers, edit the contact permissions.

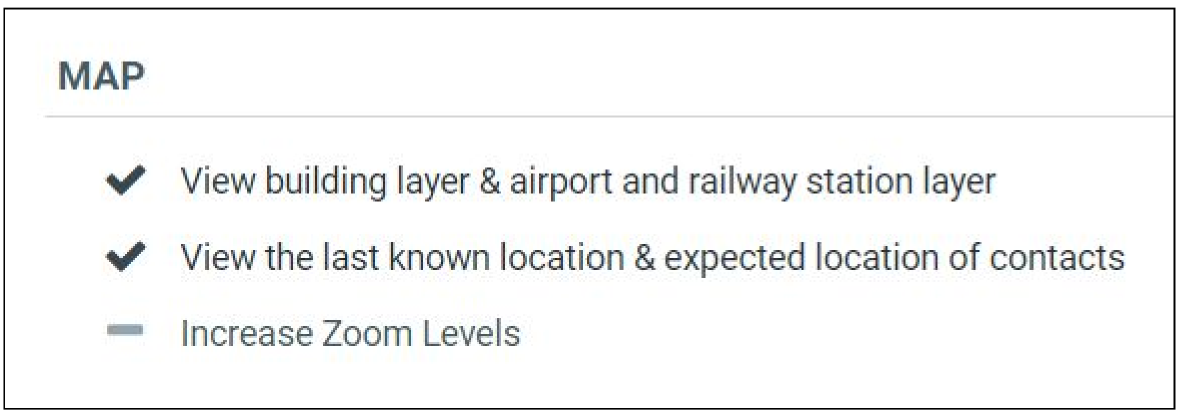
Configure Role Permissions

Administrators can configure the permissions for previously created roles. This allows you to grant or revoke certain permissions beyond those assigned to the role by default. This is useful, for example, if you want to allow an Organization Administrator to add users or roles for an Organization.

Permissions that you can configure have a checkbox next to them.



Hard-coded permissions have a large gray dash or black checkmark next to them.



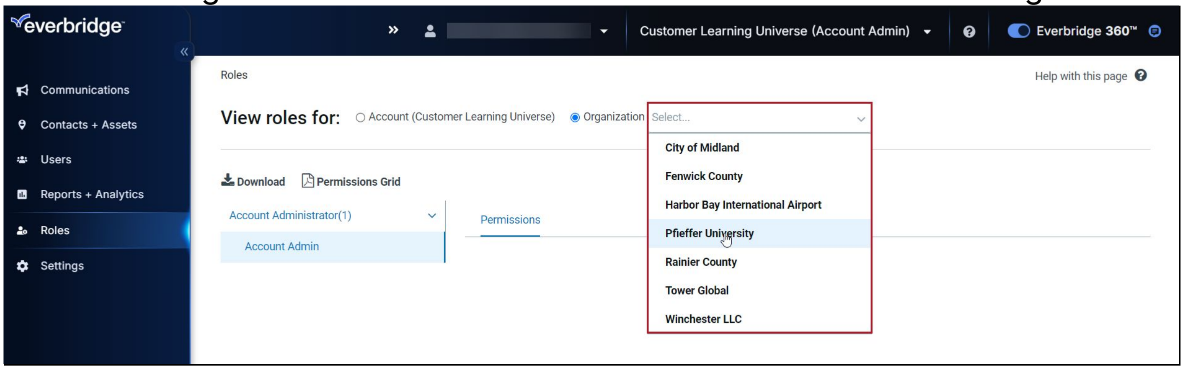
NOTE: This page describes configuring permissions for Legacy Roles. For more on Custom Roles, see the Custom Roles Guide.

Configure from the Account Level

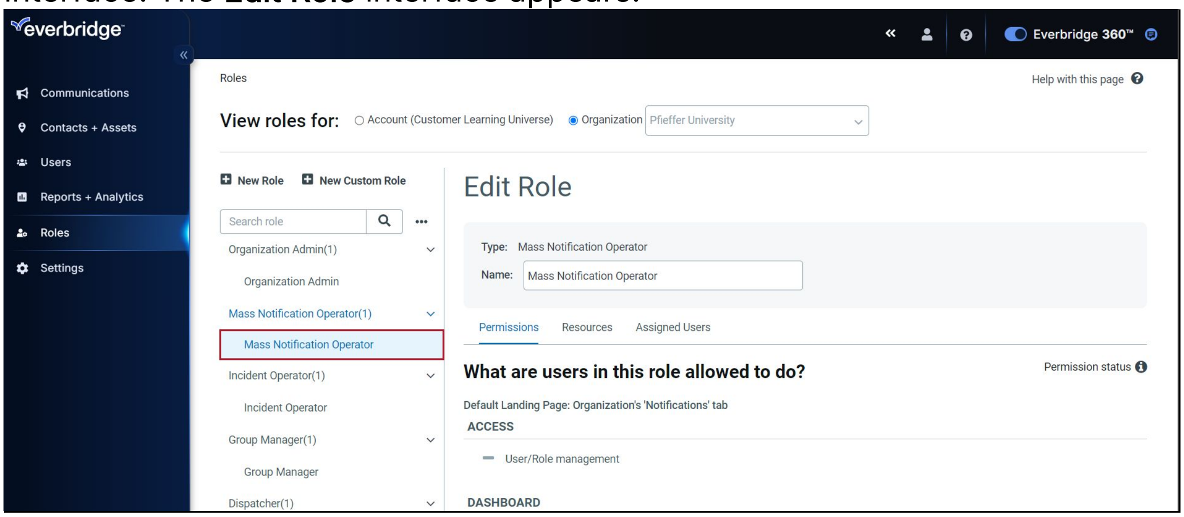
To configure a role from the Account Level:

1. Navigate to the **Roles** tab.

2. Select the Organization that contains the role that needs to be configured.

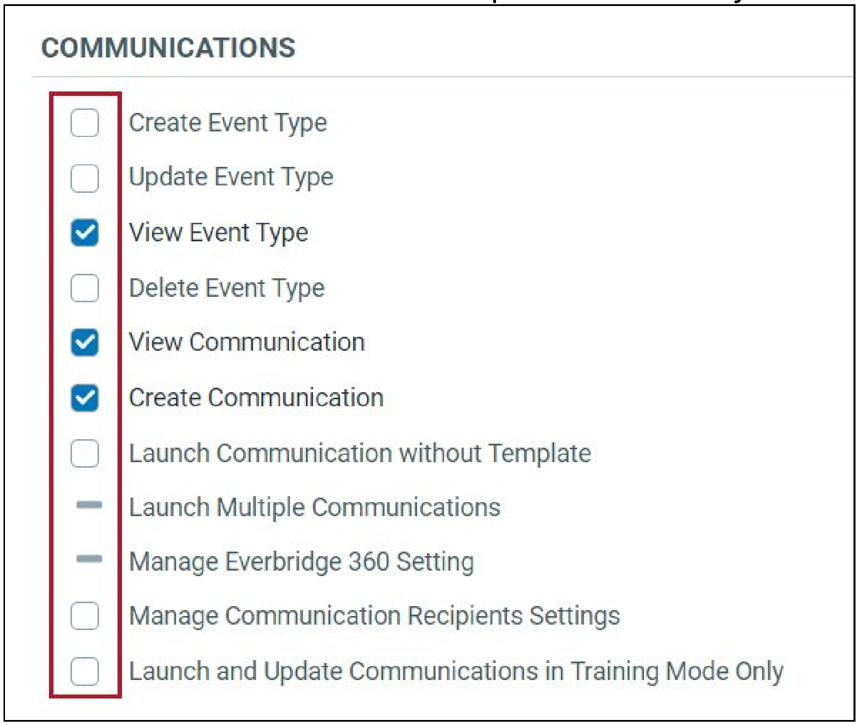


3. Select the role that you want to configure from the left-hand side of the interface. The **Edit Role** interface appears.



4. Click the **Permissions** tab if the interface doesn't open it by default.

5. Select the checkbox next to the permission that you want to grant the role.

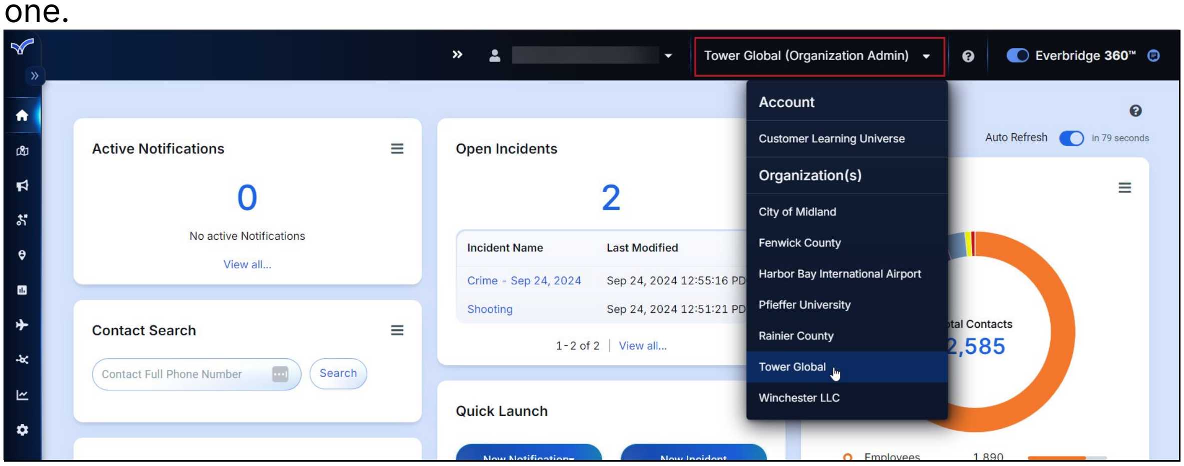


6. Click **Save**.

Configure from the Organization Level

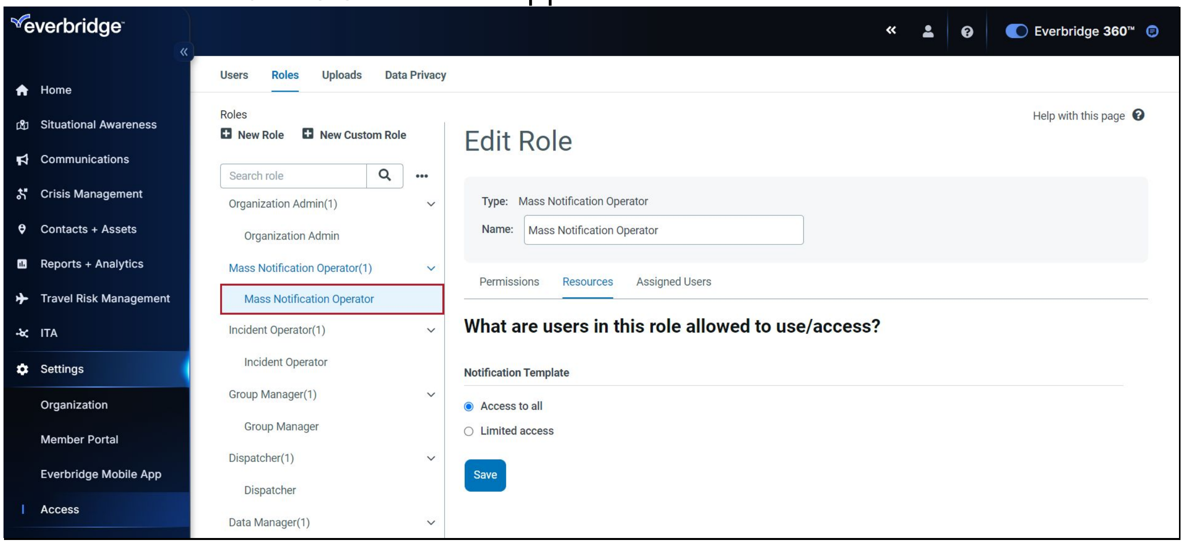
If enabled, Organization Administrators can configure a role from the Organization Level:

1. Select the desired Organization from the dropdown menu. Note that if you only have access to one Organization, you won't be able to select a different one.

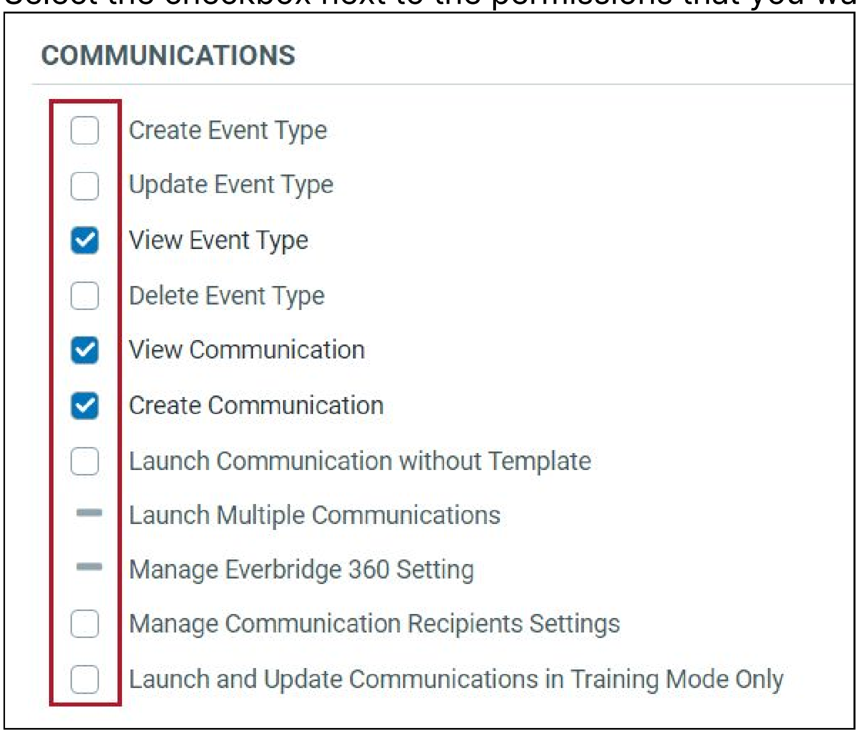


2. Navigate to **Settings** > **Access** > **Roles**.

3. Select the role that you want to configure from the left-hand side of the interface. The **Edit Role** interface appears.



4. Click the **Permissions** tab if the interface doesn't open it by default.
5. Select the checkbox next to the permissions that you want to grant the role.



6. Click **Save**.

NOTE: Organization Administrators need to be granted the **User/Role Management** permission to create or manage users and roles within their own Organizations.

Data Privacy Policy

The **Data Privacy Policy** is a more granular control built on our current role-based access control (RBAC) framework. If Feature Permissions control capability (what you can do), then Data Privacy will focus on data access (what data you can see or edit). For example, you will be able to download contact records if your role has that feature enabled, but you will not be able to view restricted fields within the download file if you have no view permission for relevant fields in the Data Privacy Policy.

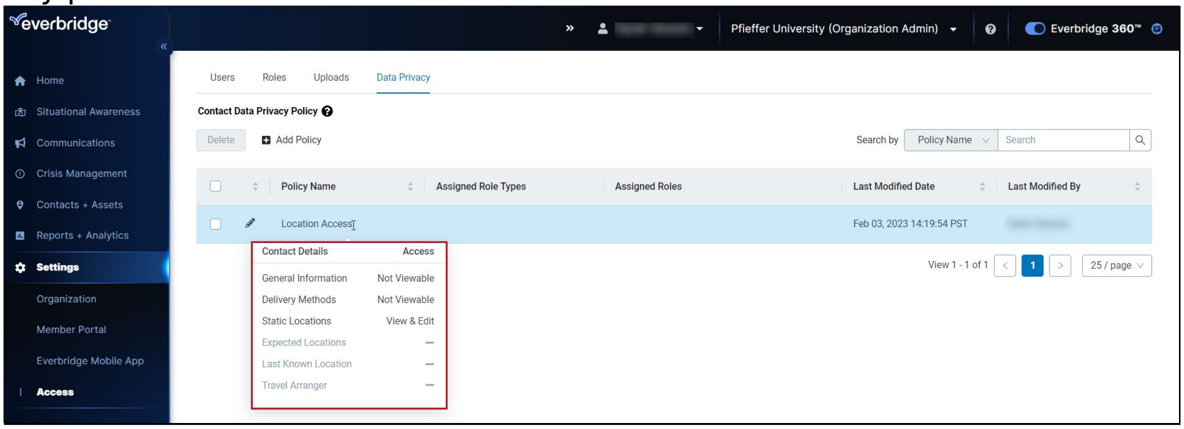
The Data Privacy Policy feature allows Organization Administrators to restrict **Group Managers**' access to sensitive information without hindering their ability to view relevant contact data within the Everbridge Suite.

> **NOTE:** A role that's been assigned a Data Privacy Policy can be restricted from accessing certain fields of contact data, which may fail to perform some actions.
>
> For example, a Group Manager role who has the feature permission to create a contact but doesn't have permission to edit the General Information section of a contact won't be able to create a new contact, as External ID and Record Type are mandatory fields for new contact creation. When configuring, please double-check that you don't have conflicting settings for Feature Permission and Data Privacy Policy to avoid unexpected errors.

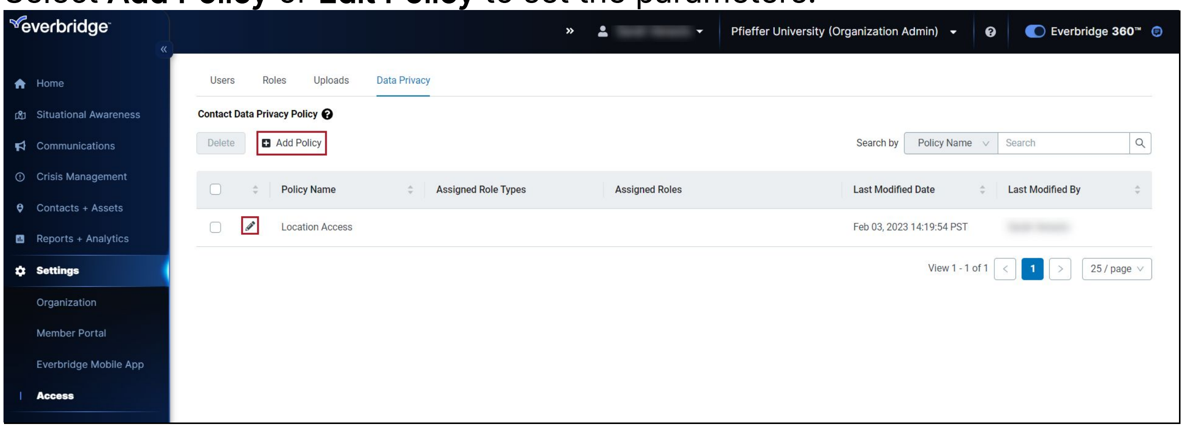
Configuring a Data Privacy Policy

1. To start, select **Access**, and then **Data Privacy**. You'll land on the **Data Privacy** page, which will list any preexisting policies for your Organization. Hovering the mouse over a Policy Name will display a quick preview of its

key permissions.

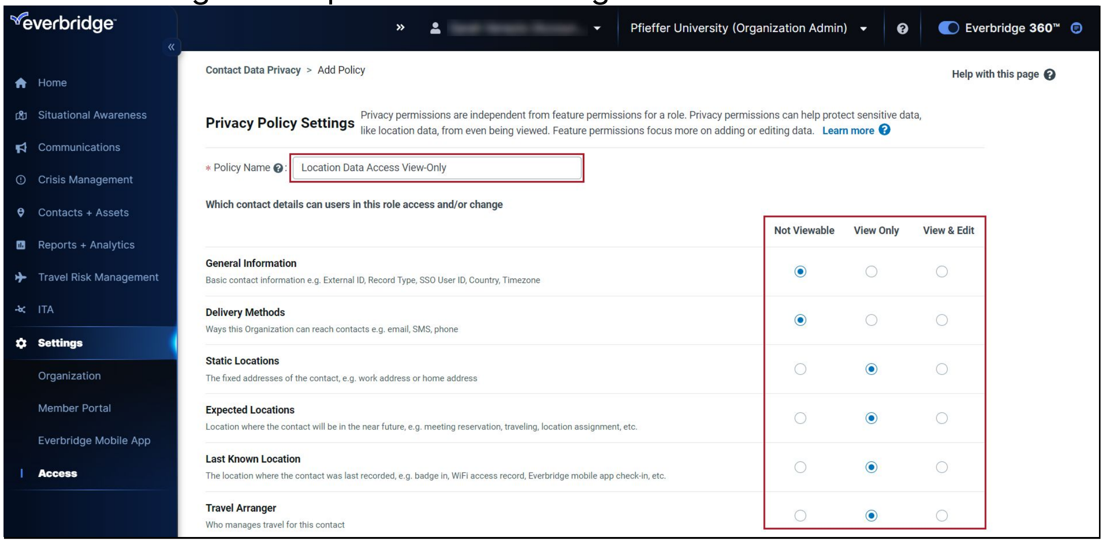


2. Select **Add Policy** or **Edit Policy** to set the parameters.

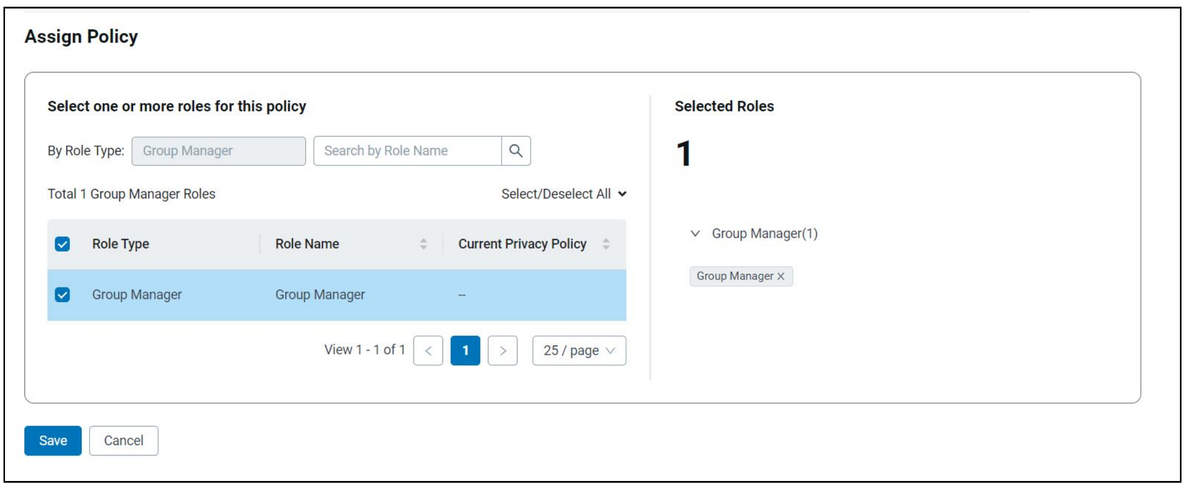


3. After landing on the **Add** or **Edit Policy** pages, you'll be prompted to enter a **name** for the policy, as well as configure the specific permissions that should be included or excluded in the rule. They can be set to Not Viewable, View Only, or View and Edit.
   - **General Information**: Basic contact information (External ID, SSO User ID, Country, etc.)
   - Delivery Methods: Ways this Organization can reach contacts (email, SMS, phone)
   - Static Locations: The fixed addresses of the contact (like work or home addresses)
   - Expected Locations: The location the contact will be in the near future (meeting reservation, traveling, location assignment, etc.)
   - Last Known Locations: Locations the contact has been recently (badge in, WiFi access record, Everbridge mobile app check-in, etc.)

- Travel Arranger: The person that manages travel for this contact.



4. Scroll down to **Assign Policy** to select the roles that apply. Note that this is currently limited to only **Group Managers**, which will be the only option available.



5. Select **Save**. This new Privacy Policy will now be shown on the Organization's policy list.

Disable User Policy

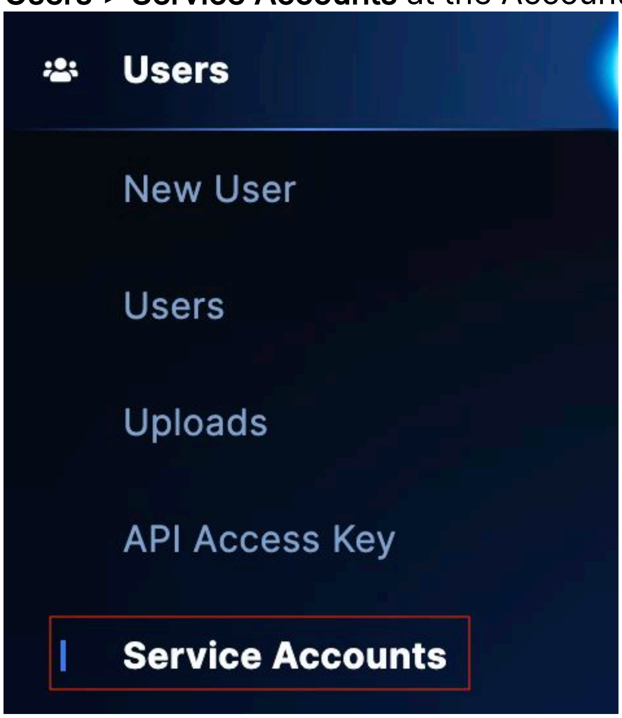
Service Accounts

Service Account client credentials can be created and managed at the Account and the Organization levels by their respective administrators. Currently, five accounts can be created at the Account level and five accounts at each Organization level.

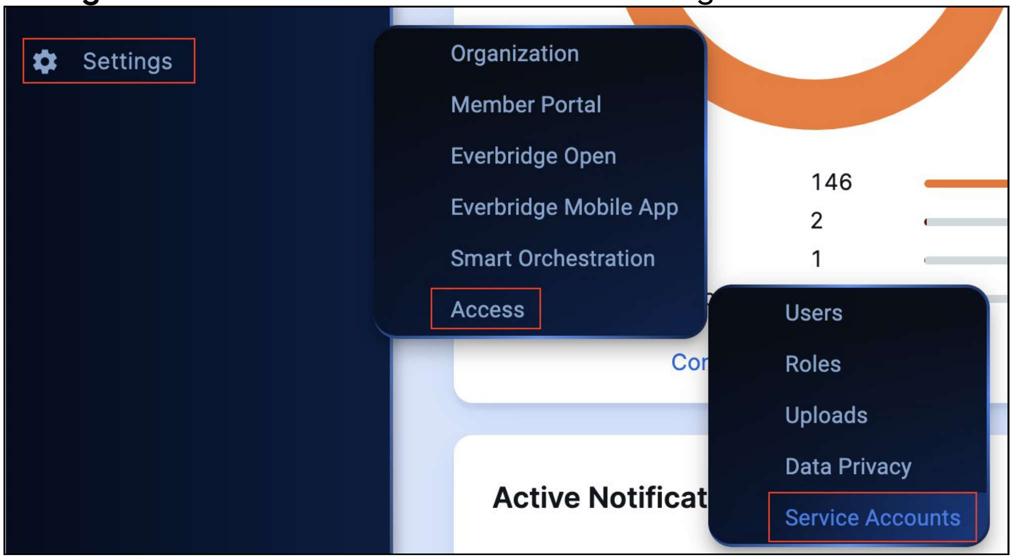
Creating a Service Account

To create a Service Account from the Manager Portal:

1. Navigate to either:
    - **Users** > **Service Accounts** at the Account level.

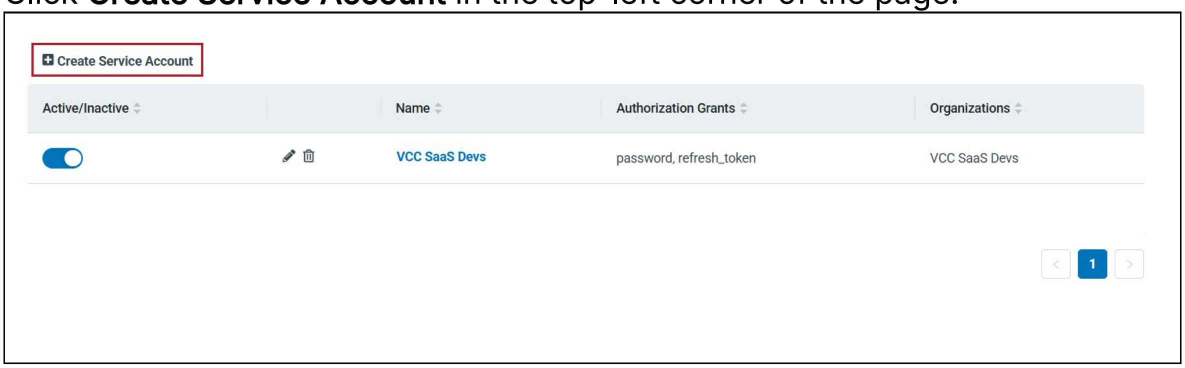


- **Settings** > **Access** > **Service Account** at the Organization level.

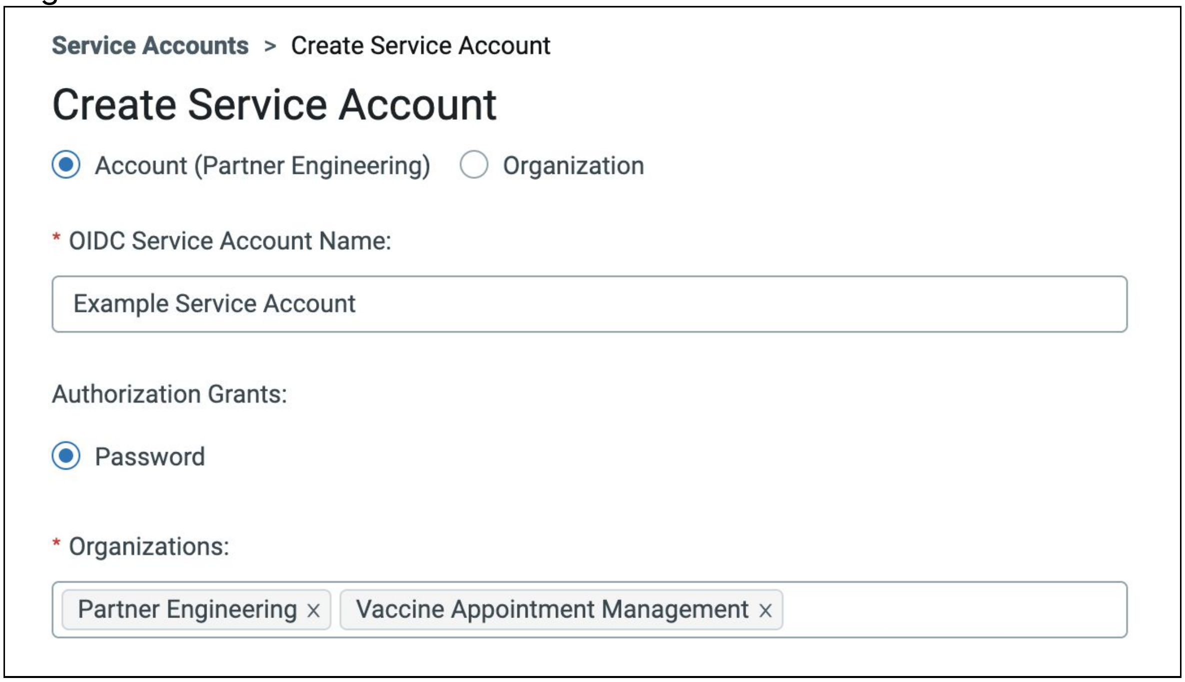


   - If you do not see the **Service Accounts** menu item, contact support to enable OAuth. There is no Additional Charge to use this method of API Authentication.

2. Click **Create Service Account** in the top-left corner of the page.



3. Select from the radio button options if you are creating an Account or Organization-level Service Account.



4. Enter the Account Name and select the Organization(s) this account will be allowed to access. Click **Save**
5. You will then be redirected to the View Service Account screen where you can:
   - Retrieve your Client ID.
   - View and retrieve your Client Secret.
   - Regenerate your Client Secret in the event of a security concern.
   - View instructions on how to create the accompanying API User.
6. If configuring from the Account level, navigate to **Settings** > **API Authentication Methods** and select the **Access Token** checkbox. If this box remains unchecked, the API request will not be authorized.

Multiple Service Accounts

It's recommended to create a separate service account for each integration within the specific Organization you are integrating with. However, for Account-level APIs, such as the User and Audit Log APIs, a single service account may suffice.

Contacts

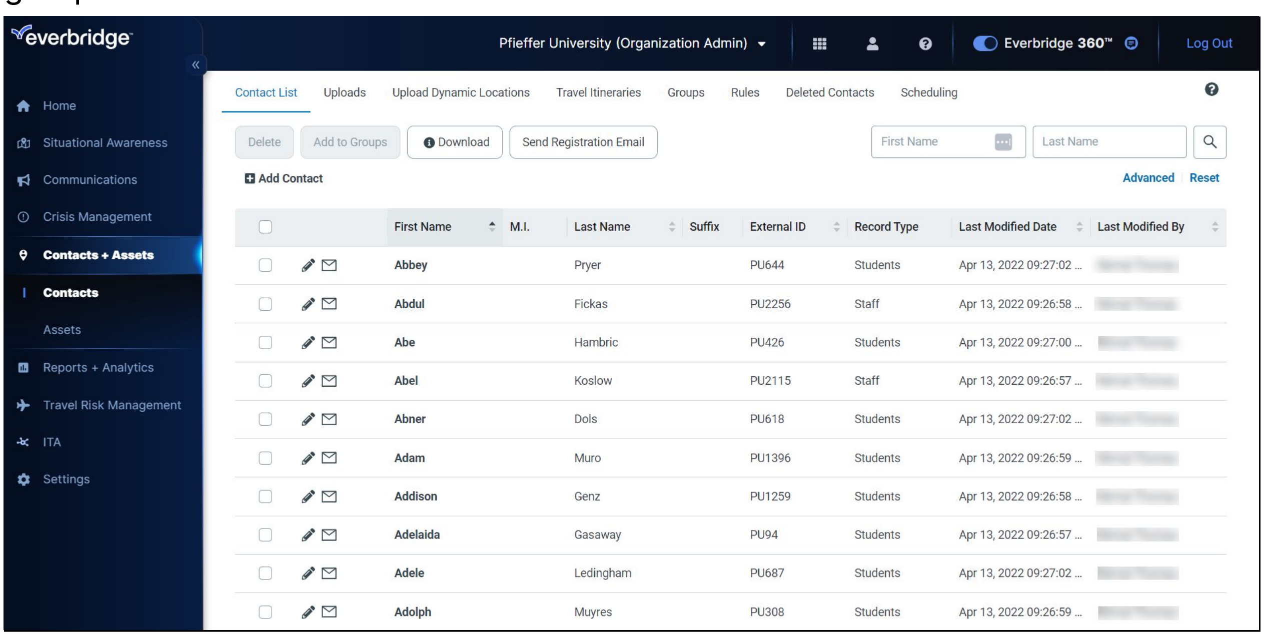
Contacts are people who receive Notifications from your Everbridge Organization.

The information your Organization uses in Contacts can vary but some sources include:

- Business, health care, and higher education Organizations can load employee contact information from a Human Resources system.
- Vendors and customers can be loaded from a Contact system.
- Higher education Organizations can bring data from a Student Information system.
- Regional and local governments can use emergency and non-emergency residential and business phone lists.
- Governments can open a public portal where citizens can register with their contact information and opt-in to receive Notifications.

An Organization sends Notifications to its own contacts. The contacts in an Organization can be assigned to one or more groups. Contacts can be assigned to groups to organize them and send Notifications to them quicker and easier. You can select one or more groups to receive a Notification. An Account Administrator can add a Group Manager for a group within an Organization.

See the Permissions Grid on the **Roles** page to learn who can perform Everbridge Suite activities such as managing contacts, sending Notifications, and adding groups and rules.



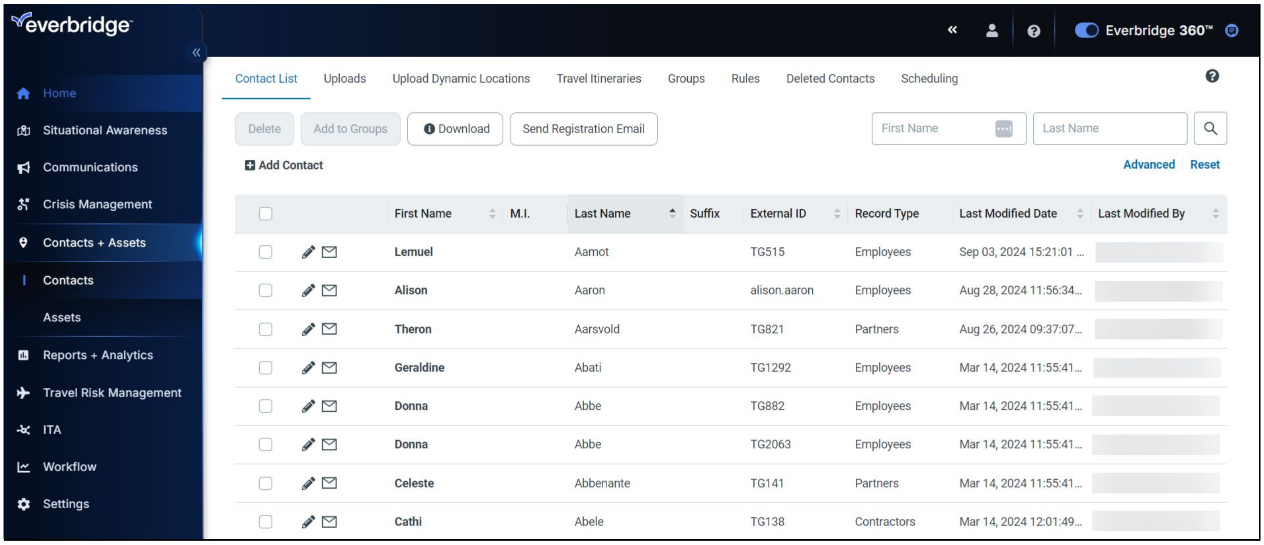
From the **Contacts** tab, manage your contacts with the following:

- Maintain Contacts
- Upload Contacts
- Contacts: Groups and Rules
- Delete and Restore Contacts

NOTE: To upload dynamic locations, see Uploading Dynamic Locations in the Safety Connection User Guide.

View Contact List

The list of contacts is sorted alphabetically by Last Name by default. You can sort by a different value by clicking the desired column heading. Click the column heading again to reverse the sort order.



User Status	Description
Pencil	Use the **Pencil** icon to edit a contact's information.
Envelope	Send Registration Email. The user is not yet registered. Select the checkboxes in the rows containing the users' names and then click the Send Invite button. (Or, if the Send Invite button is not displayed, select **Member registration** from the **Send Invitation Email** drop-down list.) Or, click the Envelope icon in the row containing an individual user's name. When the user receives the email, he or she can select the link to go directly to the Registration page. Once registered, the user becomes active and can use the system. Private Portal and Device registration invitations expire after 30 days compared to 72 hours for user registration requests.
Everbridge Mobile App	Send Everbridge Mobile App Quick Registration. Select the checkboxes in the rows containing the users' names and then select **Mobile device registration** from the **Send Invitation Email** drop-down list. Or, click the **Device** icon in the row containing an

	individual user’s name. When the user receives the email, he or she can select the link to go directly to the Registration page. Once registered, the user becomes active and can use the Member Portal. You see the **Device** icon and the **Everbridge Device Registration** selection only if the following three conditions are met: 1. Your Everbridge representative has selected Everbridge Mobile App in the Account/ Organization pages of EBAdmin. 2. There is a Mobile Push Alert delivery method identified in **Settings** > **Organization** > **Notifications** > **Delivery Methods**. 3. The Private portal type is selected in **Settings** > **Member Portal** > **Portal Options**. Private portal registration invitations expire after 30 days compared to 72 hours for user registration requests. For details on registering, see the Everbridge Mobile App User Guide.
Secure Messaging 	Select the checkboxes in the rows containing the users’ names and then select **Mobile device registration** from the **Send Invitation Email** drop-down list. Or, click the **Device** icon in the row containing an individual user’s name. When the user receives the email, they can select the link to go directly to the Registration page. Once registered, the user becomes active and can use the Secure Messaging app.

At the bottom of the list, the page counter shows you which page you are viewing and how many pages contain the entire list. The drop-down field shows how many contacts are currently displayed per page. The record counter shows the records currently displayed and the total number of records in the Organization.

Use the arrow buttons (**First Page**, **Previous Page**, **Next Page**, and **Last Page**)to step through the pages. Or, to go directly to a page, type the page number in the **Page** field, and press **ENTER**.

Managing Your Contacts

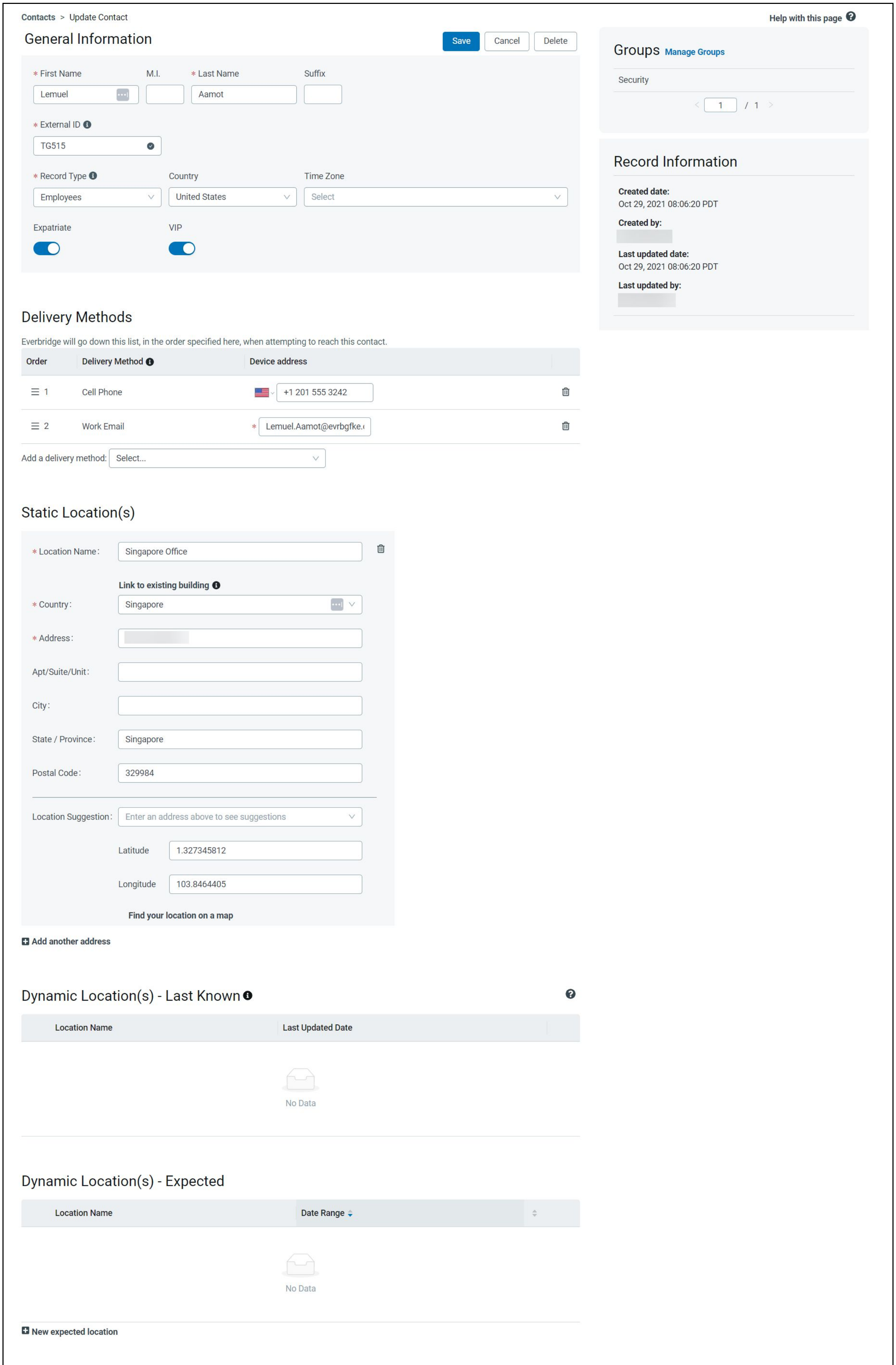
After configuring the contact settings, you can add contacts to Everbridge Suite. Contacts can be added individually or through an upload process. The following sections provide more detail:

- **Adding Contacts Individually** - Manually Adding an Individual Contact
- **Preparing to Upload Contacts** - Upload a Contact Data File via SFTP and Upload a Contact Data File via the Manager Portal.

You can also edit and delete contacts individually or through an upload process.

Contact Record

Contact records can be edited by clicking on the contact from the list view and then updating the necessary fields from Update Contact.

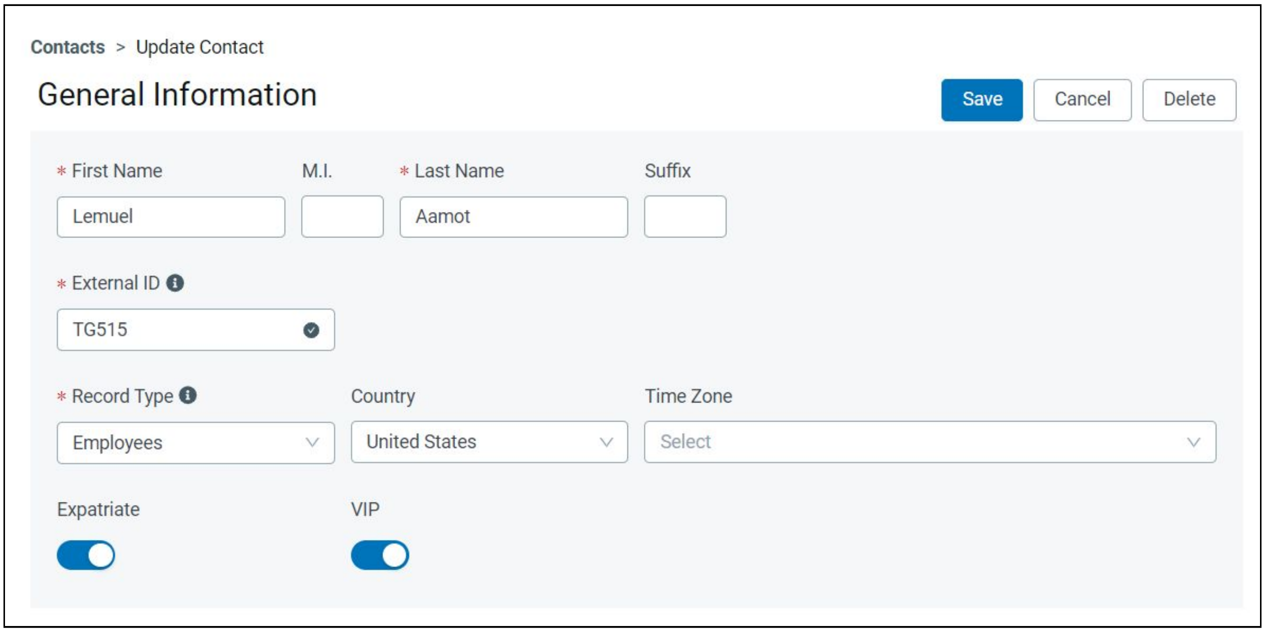

Contacts > Update Contact
Help with this page
General Information
Save
Cancel
Delete
* First Name
M.I.
* Last Name
Suffix
Lemuel
Aamot
* External ID
TG515
* Record Type
Country
Time Zone
Employees
United States
Select
Expatriate
VIP
Groups
Manage Groups
Security
1
/ 1
Record Information
Created date:
Oct 29, 2021 08:06:20 PDT
Created by:
Last updated date:
Oct 29, 2021 08:06:20 PDT
Last updated by:
Delivery Methods
Everbridge will go down this list, in the order specified here, when attempting to reach this contact.
Order
Delivery Method
Device address
1
Cell Phone
+1 201 555 3242
2
Work Email
Lemuel.Aamot@evrbgfke.
Add a delivery method:
Select...
Static Location(s)
* Location Name:
Singapore Office
Link to existing building
* Country:
Singapore
* Address:
Apt/Suite/Unit:
City:
State / Province:
Singapore
Postal Code:
329984
Location Suggestion:
Enter an address above to see suggestions
Latitude
1.327345812
Longitude
103.8464405
Find your location on a map
Add another address
Dynamic Location(s) - Last Known
Location Name
Last Updated Date
No Data
Dynamic Location(s) - Expected
Location Name
Date Range
No Data
New expected location

Generate a Reset Password URL

Any user who has Contact Management permissions can directly copy a URL to reset a password via the Member Portal for specific members. (The member can log in to the Member Portal and change the password again, as needed.) Or, the Account Administrator can copy and send the URL to a member via any delivery method. The member accesses the URL to reset the password.

General Information

The **General Information** section of the contact record contains the name and ID information for the contact. Required fields have a red asterisk (*) next to the field label.



- **First Name**
- **Middle Initial**
- **Last Name**
- **Suffix**
- **External ID** must be unique in the Organization. The unique ID prevents duplication of records and customizes individuals with the same name. Your Organization might use Employee ID numbers or some other plan that contains unique IDs.
- **Records types** in the menu are configured by the administrator for this particular Organization.
- The **SSO User ID** is shown here, if applicable.
- **Original Organization** is a display-only field showing the original Organization name for this contact.

If the contact is an Expatriate or VIP, toggle the corresponding switch to mark this status on the contact record. These system attributes are displayed in the Manager Portal and fully supported by contact rules, dynamic groups, and contact APIs.

> **NOTE:** The Expatriate variable is only available for Travel Protector customers.

Groups

From the **Add** or **Edit Contact** dialog, you can add and remove the contact to and from selected groups. Click **Manage Groups**.

Secure Messaging Information

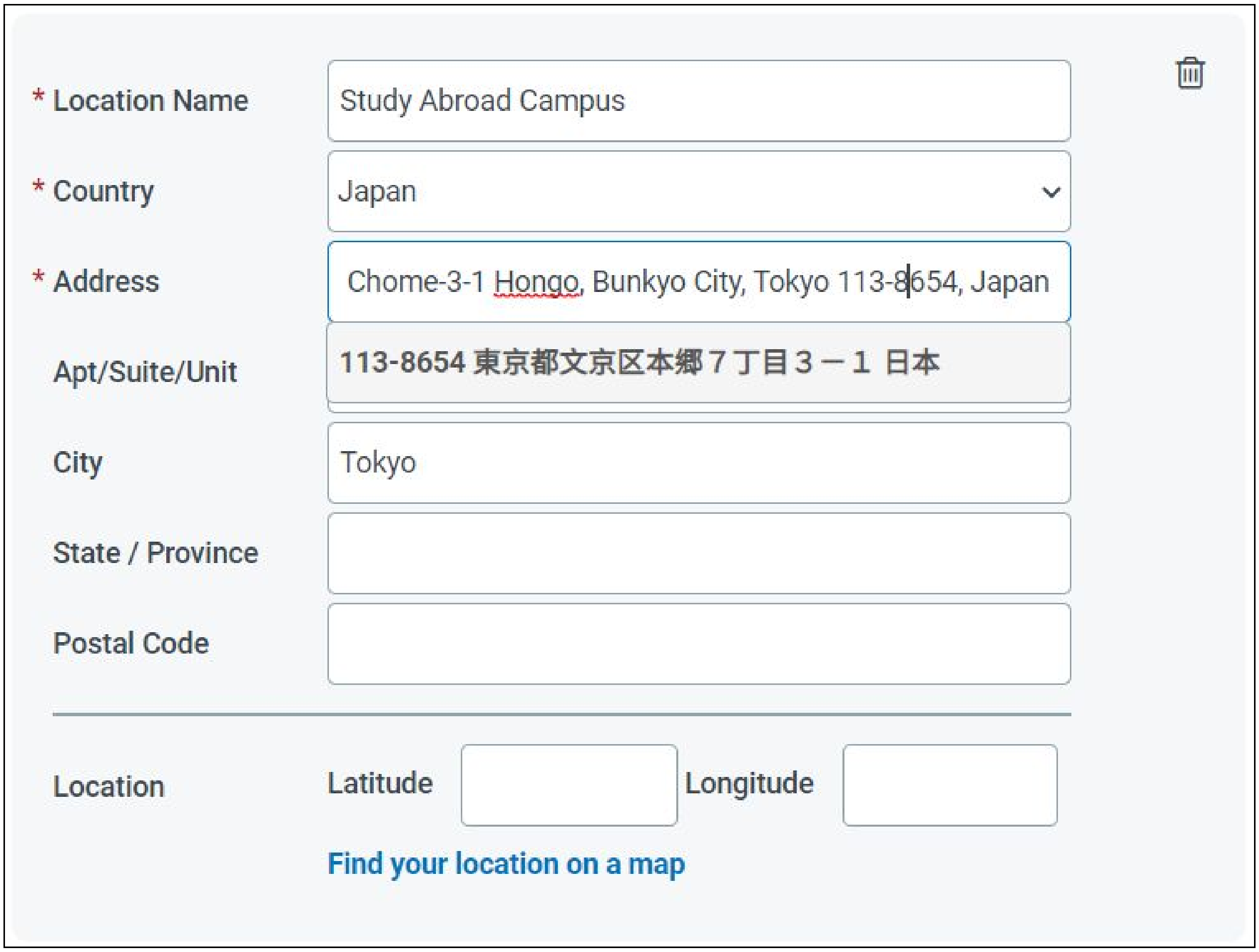
If the contact is a Secure Messaging user, the display-only field shows Yes. Likewise, if the contact is not a Secure Messaging user, the display-only field shows **No**.

Static Locations

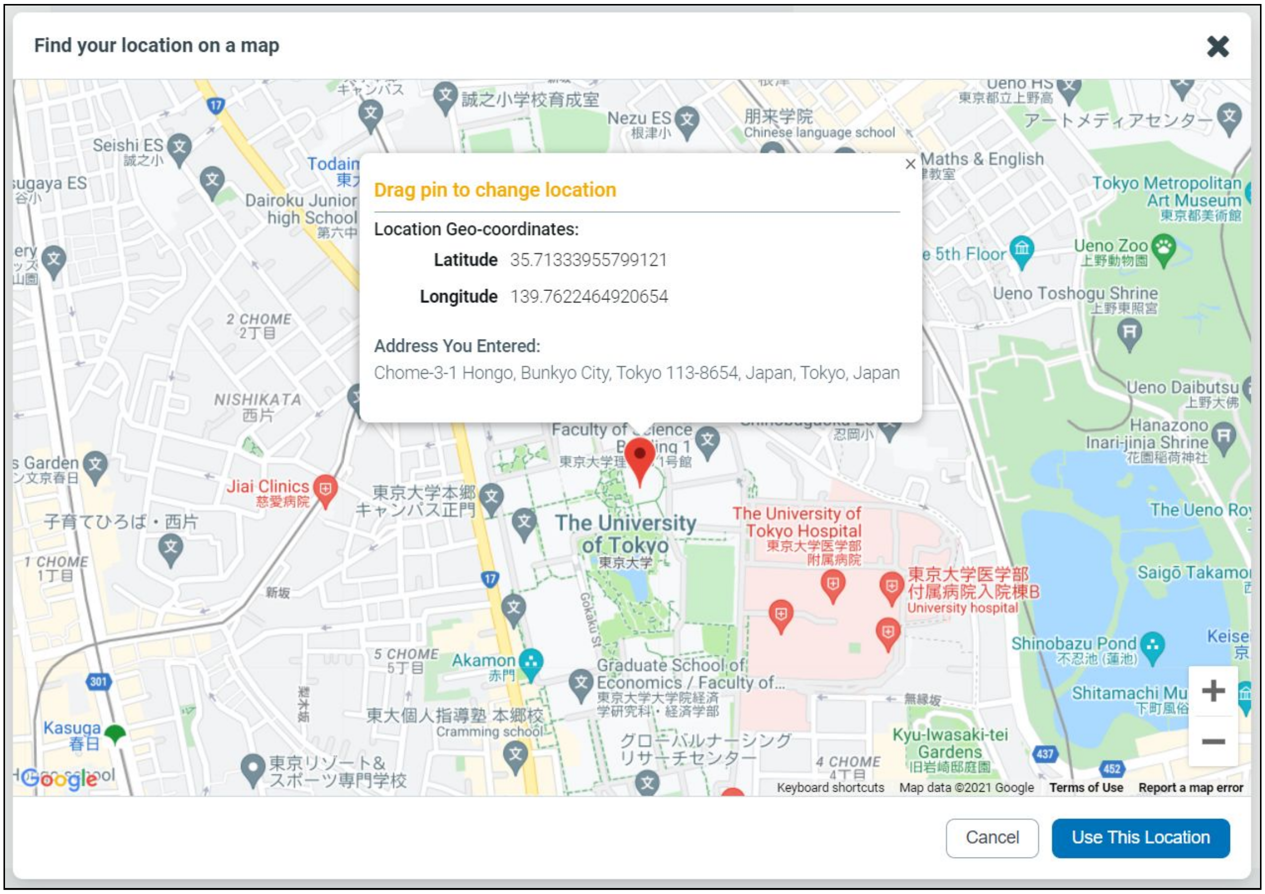
The **Static Location(s)** section of the contact record allows you to define up to five locations for each contact. These locations can be used to include the contact in a Notification sent using map addresses. Click either **Enter Address** or **Add another address**.

Location Name can be used when you send a Notification; for example, “Work” or “Home.” Verify the correct Country is selected. Enter address information, up to the Postal Code field. The system attempts to convert this address into a standardized format from the list.

For an international address, select the desired country from the Country drop-down list. Using US English, type the entire address in the Address field and the city in the City field. If supported, suggested addresses are displayed in the country's local language; otherwise, suggested addresses are displayed in US English.



The selected address is automatically geocoded so that you can notify this contact using the map. Select the link: **Find your location on a map**. Verify the location, then click **Use This Location.**



Click **Add another address**, as needed.

To remove a location, click the **Delete** button (X).

Dynamic Location(s) - Expected

The **Dynamic Location(s)** section of the contact record allows you to define dynamic locations for each contact. These locations are used to include the contact in a Notification sent using map addresses. Click **Add an expected location**.

Add an Expected Location is used when you send a Notification; for example, to an airport or to a specific address. 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 attempts to convert this address into a standardized format from the list.

> **NOTE:** Administrators set the time that Expected location records are kept.

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

Travel Arranger

Add an existing contact as a Travel Arranger for a contact.

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

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

Delivery Methods

The **Delivery Methods** section of the contact record contains the message delivery information for the contact. This is the section where you configure the device details to deliver a Notification to this contact, including mobile phone numbers, email addresses, etc. The delivery methods in the list are configured for your Organization.

Select one or more delivery methods from the list. Adding more delivery methods means that it is more likely the message gets through to the contact as quickly as possible. For each delivery method, supply a device address or phone number.

- **For email addresses** - Use SMTP format. That is, username@example.com.
- **For phone numbers** - Confirm the Country to ensure the system uses the correct dialing instructions and that the message is sent from the correct location. Then enter only the digits of each phone number. Refer to this Knowledge Base article in the Everbridge Support Center for more details.

  If the system calls a phone number and reaches an answering machine or voice mail, it waits a short time for the announcement to play before leaving a message.

  When a message is sent to this contact, Everbridge tries the delivery methods, one after another, until the contact responds or until it has tried all the methods. The system uses the order of the list. To reorder the delivery methods, use the Up and Down arrows to move them accordingly.
- If selected in **Settings**, in the **Status** column, "ON" enables you to turn off the delivery method so that it does not receive any Notifications and specifies quiet periods. Then, also select the blue icon to set up the quiet time of the delivery method. (If the contact's time zone has not been set, select the time zone from the **Set Up Contact's Time Zone** dialog. After you click **OK**, you can set the quiet time.) From the **Quiet Time - [Delivery Method]** dialog, give the Quiet Time a name, select the days and time range (or click the 24 Hours

check box). Click **OK**. The Quiet Time name appears alongside the delivery method.

Everbridge recommends you place text paths, such as SMS and email, higher in the order than voice-based methods. In the event of an emergency, a voice message might be difficult to hear, while a text-based message will be clear.

> **NOTE:** The Everbridge Mobile App is not on the list of delivery methods until the contact downloads the application and logs in. You do not need to add it to the list.

Additional Information

The **Additional Information** section of the contact record contains custom fields configured by your Organization. An Additional Information field can be a:

- text box, where you type a value (if a Date, use format: yyyy-mm-dd).
- date field, where you select a date by clicking the Calendar icon and selecting the date.
- single-select list, where you select one value from the drop-down list.
- multi-select list, where you select one or more values from the drop-down list.

If configured for your Organization, select a field to add for this contact. Example custom fields are: Office Location, Floor or Building, Badge ID, Certifications or Training, Specialties, and Special Assistance Needed.

For multi-select lists, from the Values/Possible Values, select the desired one and click the Right arrow (>) to move the selection to the **Selected** list on the right-hand side of the panel. Continue to assign values, as needed, and click **Save**.

To remove a value, select it from the right-hand **Selected** list, and click the Left arrow (<) to return it to the Values/Possible Values list. The double arrows (<< and >>) move the entire list of values from one side to the other.

Alert Subscriptions

The **Alert Subscriptions** section of the contact record displays the number of weather subscriptions, if any, and a link to manage subscriptions for a particular contact. The subscriptions must first be added by an Administrator from **Settings > Organization > Contacts and Groups > Alert Subscriptions.**

Record Information

The **Record Information** section shows the following display-only fields:

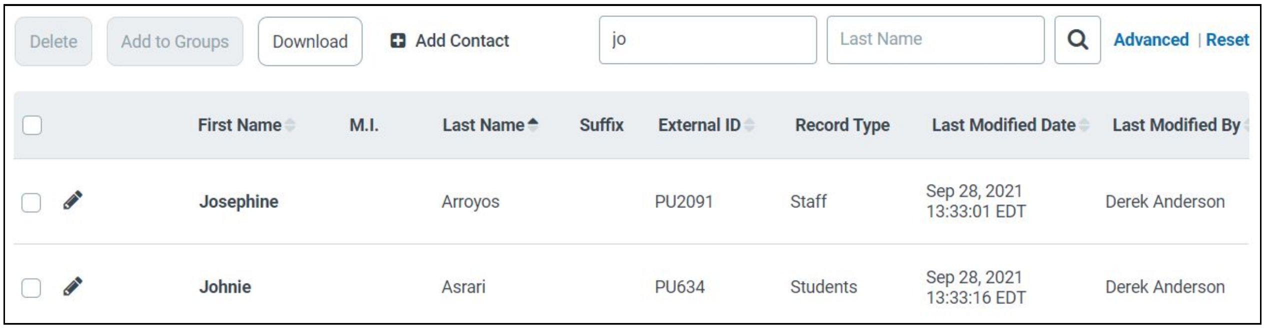
- **Created date**
- **Created by**
- **Last updated date**
- **Last updated by**
- **Registration success date**

Group Associations

The **Group Associations** section displays the group names to which the contact belongs, or “No groups found”.

Searching for Contacts

From the **Contacts** tab, in the Search field, you can find a contact by First Name, Last Name, or both. Narrow your search by typing more characters in the Search fields.



For example, in the First Name field, typing **Jo** finds contacts with the first names of Josephine and Johnnie. If you search First Name only, the matches are sorted by first name; if you search Last Name only, the matches are sorted by last name; if you search both First Name and Last Name, matches are sorted by last name. To clear the **Search** field, click **Reset**.

Advanced Search

Using **Advanced Search**, you can filter your search using the following fields:

CATEGORY	Field
CONTACT DETAILS	
	Linked User
	Calendar
	Secure Messaging User
	Contact External ID
	Contact First Name
	Contact Middle Initial
	Contact Last Name
	Contact Suffix
	Contact County
	Delivery Method Value
	Delivery method Value
	Created On
	Last Modified By

	Last Modified On
	Record Type
	Registered
	Registered Email
	Registered On
	Associated Group(s)
	DeliveryMethod-Pager Service
LOCATION DETAILS	
	Contact is Geocoded
	Geocode Source
	Location Name
	Location Street Address
	Location Apt/Suite/Unit
	Location City
	Location State/Province
	Location Country
	Location Postal Code
	Location Latitude
	Location Longitude
	Building Name
	Floor Number
DYNAMIC LOCATION	
	Last Known - Building Name
	Last Known - Floor Number
	Expected Location - Building Name
	Expected Location - State / Province
	Expected Location - Country
	Expected Location - City
	Expected Location - Airport / Railway Station
	Expected Location - Location Name
ADDITIONAL INFORMATION (Examples only.)	
	Hire Date
	Company

	Department
	Street Name
	Building Number
	Role
	Badge ID
SUBSCRIPTIONS (Examples only.)	
	(Weather Alerts)
	Keywords (Alerts)
	Santa Clarita Parks (Events)
	Meetings(Events)
	Events(Events)
	Thunder(Thunder Events)

Examples of Advanced Search and Rules filters

The following are examples of when you can use **Advanced Search** or **Rules** to filter your search:

- You want to reach out to contacts to ask them to enter a location, so you can send them Notifications. You will input two filters:
  - Field: **Location Latitude**
  - Condition: **is empty**
  - Field: **Location Longitude**
  - Value: **is empty**
- You want to see if your contacts have a third email address, you will input two filters:
  - Field: **Delivery Method**
  - Condition: **contains**
  - Value: **Email Address**
  - Field: **Delivery Method Value**
  - Condition: **is equal to**
  - Value: **Email Address 3** (this value is case-sensitive, matching the CSV header)
- Similarly, if you want to see if your contacts have a fifth SMS phone number, input two filters:
  - Field: **Delivery Method**
  - Condition: **contains**
  - Value: **SMS**
  - Field: **Delivery Method Value**
  - Condition: **is equal to**

  - Value: **SMS 5** (this value is case-sensitive, matching the CSV header)
- Before you delete Record Type A and Record Type B from your database, you need to know if you have any contact records that are in Record Type A or Record Type B.
  - Field: **Record Type**
  - Condition: **contains**
  - Value: Select **Record Type A,** scroll, and while holding down CTRL, select **Record Type B**
- Before you generate the next feed from your HR system, you need to find all contact records that do not have a Group.
  - Field: **Associated Group(s)**
  - Value: <Clear all check boxes>
- You want to view the Contact list for contacts created within a specific Date and Time range.
  - Field: **Created On**
  - Value: **Is between**
- You need to send an operational alert to employees based in Country A and Country B.
  - Field: **Contact Country**
  - Condition: **contains**
  - Value: Select **Country A**, scroll, and while holding down CTRL, select **Country B**
- Before you refresh your Point Address data, you need to know if any contact Locations do not have a geocoding source.
  - Field: **Geocode Source**
  - Condition: **does not contain**
  - Value: Select "**A**", scroll, and while holding down SHIFT, select **the last value in the list**
- You are refreshing your contact locations, and you need to know if any contact locations were manually geocoded or if any contact locations contained a geo-point in the CSV upload file.
  - Field: **Geocode Source**
  - Condition: **contains**
  - Value: Select **CSV Upload**, scroll, and while holding down CTRL, select **Manual Edit**
- A recent Notification was sent using the map, but several contacts were not included because they did not have a geocoded location.
  - Field: **Contact is Geocoded**
  - Condition: **false**
- A river is expected to rise above its flood stage, and you need to send a Notification immediately to all residents who have a geocoded location north of Latitude 34.00.
  - Field: **Contact Location Latitude**
  - Condition: **is greater than**

    - Value: 34.00
- Before you use a rule in a Notification, you first need to determine if any contact is missing a value in your custom field, “Job Title”.
    - Field: under **ADDITIONAL INFORMATION**, “**Role**” (the custom name)
    - Condition: **is not equal to**
    - Value: “**Job Title**”
- You need to send a Notification to anyone whose job title contains “Manager”, “MGR”, or “Mgr”.
    - Field: under **ADDITIONAL INFORMATION**, “**Role**” (the custom name)
    - Condition: **contains**
    - Value: Manager
    - Field: under **ADDITIONAL INFORMATION**, “**Role**” (the custom name)
    - Condition: **contains**
    - Value: MGR
    - Field: under **ADDITIONAL INFORMATION**, “**Role**” (the custom name)
    - Condition: **contains**
    - Value: Mgr

You can search contact records from various Everbridge Suite pages:

- **New Notification** - Select **Contacts** > **Advanced**
- **Notification Template** - Select **Contacts** > **Advanced**
- **Scheduled Notification** - Select **Contacts** > **Advanced**
- **Incident Template** - From Contacts, select **Contacts > Advanced**
- **Contacts** - **Advanced**
- **Contacts** - **Rules**
- **Contacts** - From **Contacts**, select **Scheduling** > **Staff Schedules** > **Advanced**
- **Universe** - Select **Contacts** > **Filter contacts**

Using a Filter

To use one filter:

1. From the **Contacts** tab, click **Advanced**. The Contact information fields are available, including **Contact Details**, **Location Details**, **Dynamic Locations**, **Additional Information**, and **Subscriptions**.
2. Select a field from the drop-down list on which to search. The list displays the contact fields. The fields include ones for contact management, such as whether a contact’s address is geocoded.
3. Select the condition on which you want to search. The conditions depend on the type of data in the field. For example, a Name field is a text field. A text-formatted field may have different conditions than a date-formatted field.
4. Type the value in the correct format for the data type.
    a. A Date data type must be in YYYY-MM-DD format. This field offers a Calendar icon, from which you can select the desired date. The String

data type can be any alphanumeric characters, and the Number data type can be numeric characters.

   b. If the field type offers a single-select list, choose one value. If the field type offers a multi-select list, choose one or more values by selecting the first value, then pressing and holding down CTRL while selecting the other values.
   c. To select a range of values, select the first value, then press SHIFT while selecting the last value in the range.
5. Click **Search**. Your list is filtered to show only contacts from your Advanced Search.

Example Using One Filter

To see all your contacts assigned to a specific group, and then download that list, use one filter.

1. From the **Contacts** tab, click **Advanced**. The **Advanced Search** pane appears.
2. From the **Condition** menu, select the desired field for the filter. In this example, Associated Group(s) is selected.
3. Locate and select the value you want to query and click **Search**. In the Value field, in this example, the application displays the list of contact records assigned to the selected group from which to choose.
4. Click **Download** to download the contact records for all the members in the group to a Microsoft Excel spreadsheet. Or, select the checkboxes of the individual contact records, then click **Download**. You can also view or edit an individual contact record.

Using Multiple Fields and Conditions in a Filter

You can use multiple fields and conditions to locate your specific contacts. Suppose you wanted to find the Fire Wardens in Building 1.

To use multiple fields and conditions in a filter:

1. Using the example, locate the Fire Wardens. Follow the procedure To use one filter to select the field (Certifications) and condition (is equal to) with the value (Fire Warden).
2. Click **Add Filter Search**.
3. Locate the contacts who are in Building 1. Follow the procedure To use one filter to select the field (Location Building) and condition (is equal to) with the value (Building 1).
4. Click **Search**. When you use more than one filter, all conditions must be true. In this example, the contact must both be certified as a Fire Warden and have an office in Building 1.

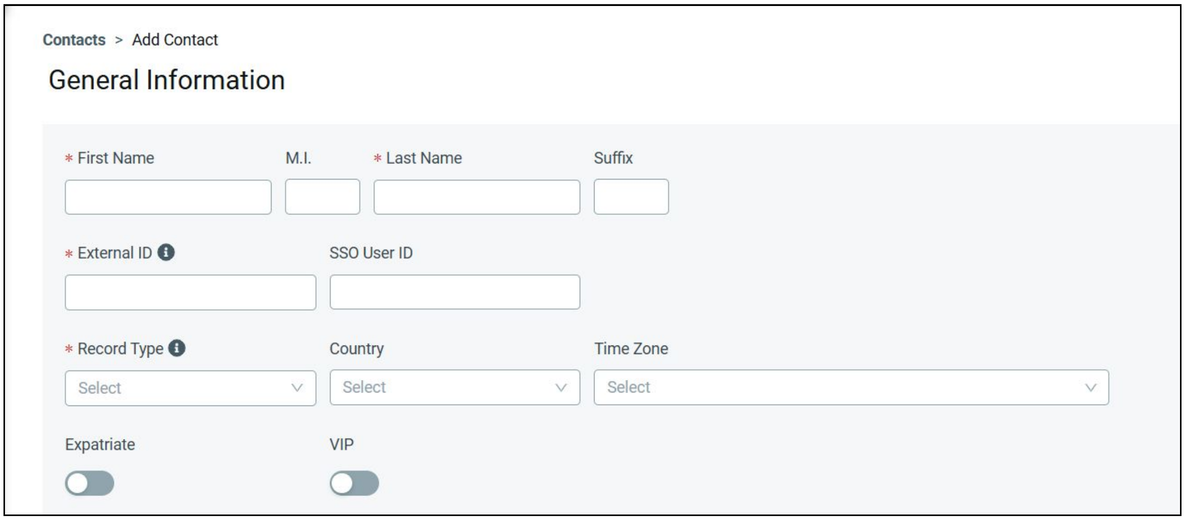
5. On the **Contacts** tab, after you have configured a search matching your selected criteria, you can save the filters as a rule. Do this by selecting the check box: **Save as rule**. You can use the rule to locate contacts for a Notification. See Create Groups and Create Rules for more information.

Manually Adding an Individual Contact

Perform the following procedure to add contacts individually.

To add a new Contact individually:

1. From the **Contacts** subtab, click **Add Contact**.
2. Fill in the **General Information** fields.



   a. **External IDs** can include email addresses, telephone numbers, login IDs, employee IDs, or other unique items within your Organization. Be consistent when choosing the External IDs, as they must be a unique identifier for each Contact.
   b. **SSO User ID** - If you have Single Sign-On functionality enabled for your Organization and want to allow your contacts to log in to the Member Portal by using their SSO credentials, enter the customer-defined SSO User ID. Ask your Organization's IT team for each contact's Single Sign-On user ID.
   c. If the contact is an Expatriate or VIP, toggle the applicable toggle. These system attributes are displayed in the Manager Portal and fully supported by contact rules, dynamic groups, and contact APIs.

3. Under **Groups**, click **Manage Groups** to add the contact to groups in your Organization.

> **NOTE:** You can add all groups except Sequenced Groups.

4. Under **Delivery Methods**, define the contact information for the devices.

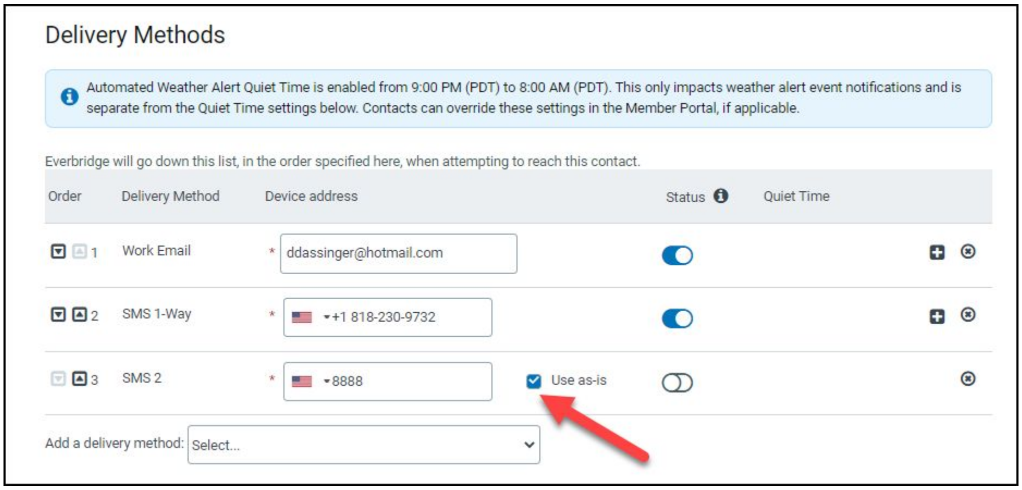
a. **Add a delivery method** - Select a delivery method from the menu. You can configure the delivery methods enabled for your Organization, but you do not have to define the contact information for every delivery method.
   - If the Delivery Method Order is **Contact Preferred**, the priority of the devices will be in the order in which they are added or populated in the profile.
   - As a best practice, use the following order of delivery methods for the contacts to receive the notifications soonest:
     - Mobile App
     - SMS
     - Email
     - Cell Phone
     - Landline

     > **NOTE:** The Everbridge Mobile App must be downloaded, and then it is automatically added to the list.

b. **Device address** - Type the device value depending on the selected delivery method. For a Phone Number, select the country from the Flag drop-down list, if needed. Then type only the phone number digits (4-20 digits).

   The **Use as-is** checkbox displays when there is a phone validation error. The **Use as-is** check box only displays for the following phone number types:
   - Extension Phone
   - Phone
   - SMS
   - TTY
   - Fax
   - Numeric Pager
   - TAP Pager
   - One-Way SMS

     To bypass the phone validation, select the **Use as-is** check box. Enter 4-20 digits.



c. **PIN** - If a Pager, type the PIN.

d. **Advanced** - Click the Advanced link to see the Pager Service field. Select your pager company from the Pager Service drop-down list. This field is displayed for the following delivery methods: Numeric Pager and Plain Text Email - 1 Way. If you select a Pager Service, then Everbridge sends your messages to the pager company using the Wireless Communication Transfer Protocol (WCTP). If you do not select a Pager Service, then your message is sent to your pager company using the telephone modem (Numeric Pager) or email server (text pagers).

e. If selected in Settings, in the Status column, ON enables you to turn off the delivery method so that it does not receive any notifications and you can specify quiet periods. Then, also select the blue + icon to set up the quiet time of the delivery method. (If the contact's time zone has not been set, select the time zone from the **Set Up Contact's Time Zone** dialog. When you click **OK**, you can set the quiet time.) From the **Quiet Time - [Delivery Method]** dialog, give the Quiet Time a name, select the days and time range (or click the 24 Hours check box). Click **OK**. The Quiet Time name appears alongside the delivery method.

f. Repeat **Steps 3a** through **3e** for every delivery method you want attempted for this contact.

g. Prioritize the delivery methods by using the Up and Down arrows on the right-hand side of the panel.

5. Under **Static Location(s),** click **New Static Location** and fill in the fields.

   a. The system begins geocoding the address. The **Select Geo Address** field allows you to select from a list of locations to which the address matches. If further refinement is needed, add the **Postal Code**.

      - **Postal Code** - Type the postal code of the address.
         - In the United States, type the 5-digit postal code.
         - In Great Britain, type the postal code (between 5 and 7 alphanumeric characters with a space before the last 3 alphanumeric characters).

- **Location Suggestion** - Select the address from the drop-down list that matches your address. Once a geocoded address is selected, the Latitude/Longitude information is populated into the corresponding fields. Everbridge supports Decimal Degrees (DD) instead of Degrees/Minutes/Seconds (DMS) when inserting latitude/longitude values for Contact and Building/Asset records.

6. Under **Travel Arranger**, add an existing contact as the travel arranger if needed.
7. Under **Additional Information**, define the desired information for the contact.
   a. **Additional Information** - Select the desired information from the drop-down list.
   b. Depending on the format, enter the possible value or values.
      - A multi-select list allows you to select from a list of values and click the Right arrow (>).
      - A single-select box allows you to select the value.
      - A text box allows you to type free-form text. If a Date, use yyyy-mm-dd format.
   c. Optionally, remove additional information by selecting the Trash Bin on the right-hand side of its row.
8. Under **Alert Subscriptions**, view and modify the contact's subscriptions by clicking **Manage Subscriptions**. The **Edit Subscription** dialog appears.
   a. Select the check box for the desired category. This exposes all the alerts in that category. Alternatively, you can select the Right arrow to display the alerts.
   b. Scroll as needed to see the entire list.
   c. Clear check boxes for the alerts that the contact should not have. Or, if you chose the Right arrow to display the alerts, select the check boxes you want the contact to have.
   d. Click **Save**.
9. Click **Save**. The Alert Subscriptions pane shows the number of subscriptions.

Geocoding

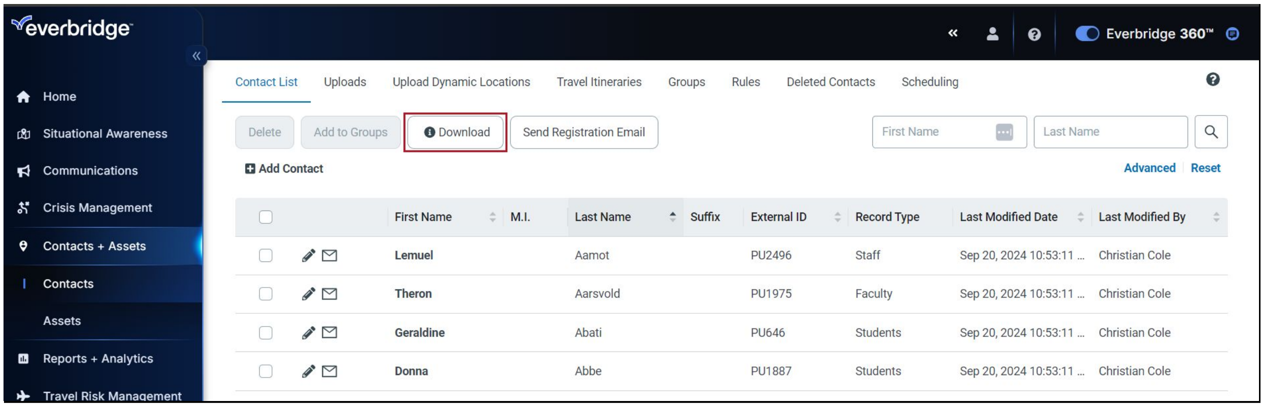
Review the following about geocoding.

- You can geocode any location, domestic or international.
- You can define up to five addresses for any given contact in the system (such as a place of business, point of interest, home location, spouse's work address, children's schools, and so forth). Do this by clicking **Add Another Address**.
- The geocoding process supports foreign language characters, making geocoding global locations quick to locate.
- Each location that is defined for the contact displays on the Universe view.

- When you enter an address, it could be geocoded. That is, the latitude and longitude of the address are verified to be a location on earth. If you enter your own latitude and longitude, the geocoding is not verified.
- Assuming the contact records pass the most critical validation tests, all records are immediately loaded in the database as the file is processed. This ensures the contacts are available for a notification even though the upload is waiting for the **Geocoding** results to return. While waiting, any address submitted without a Latitude and Longitude will not have its pair of values in the database record and will not be available for selection on the map; however, the address record is available for filtering with a Rule or Advanced Search feature from the Notification workflow.
- Everbridge Suite attempts to geocode any address submitted via the CSV file if the Latitude X and Longitude X fields are empty in the file - even if the address was submitted in a previous file and geocoded in a previous upload. Suppose your first upload file includes 8,000 addresses and all the addresses in that CSV file get geocoded. If you upload a subsequent file with 8,001 addresses, where only one address is new but no Latitude/Longitude is provided in the file for any address, then Everbridge Suite attempts to geocode all the addresses again (not just the new address).

Download Contact Records

You can download your Contact Records in a Comma-Separated Values (CSV) file from the Contact List. Use the CSV file as a starting point for making changes or restoring the contact data.



To download Contact Records:

1. Navigate to **Contacts+Assets** > **Contacts** > **Contact List**.
2. Depending on how many Contact Records need to be downloaded, either:
   - To download a CSV file containing all contacts, ensure all checkboxes are clear for all records, then click **Download**. Save the file to your local computer resource
   - To download a CSV file containing only some of the contacts, select the checkbox in the row next to each desired contact and click **Download**.
     - Everbridge Suite screens the data before downloading it to your local system. If there is any suspicious content (for example, strings that start with = + - @ " and when - or + are followed by a number) in any text field, then the CSV-formatted file will be downloaded using a TXT file type during the download.
3. Click **Download**. Save the file to your desktop.

> **NOTE:** The selections must be from a single page, so you might first need to adjust the number of contacts per page. Use Page Controls to adjust the number of contacts per page.

Create Groups

Preparing messages, lists of recipients, and other aspects of the Notification in advance reduces the chance of human error in sending and responding to Notifications. Groups are a way to organize your contacts for quick selection.

Groups

Groups are static or fixed lists of contacts that you can maintain. If configured, Group Managers can manage contact profiles and send Notifications to contacts in their own group.

When you are going to send a Notification, you can select groups as targets rather than select contacts individually. You can add a group for any set of contacts that have something in common. A contact can be in more than one group. This allows you to target exactly the contacts who should receive the Notifications. For example, a manager might be in the “Sales” group in addition to a “Managers” group. Individual contacts and groups can be nested within a group, such as “Joe Hamilton” individual and the “Fire Department” and “Police Department” groups nested in a “Public Safety” group.

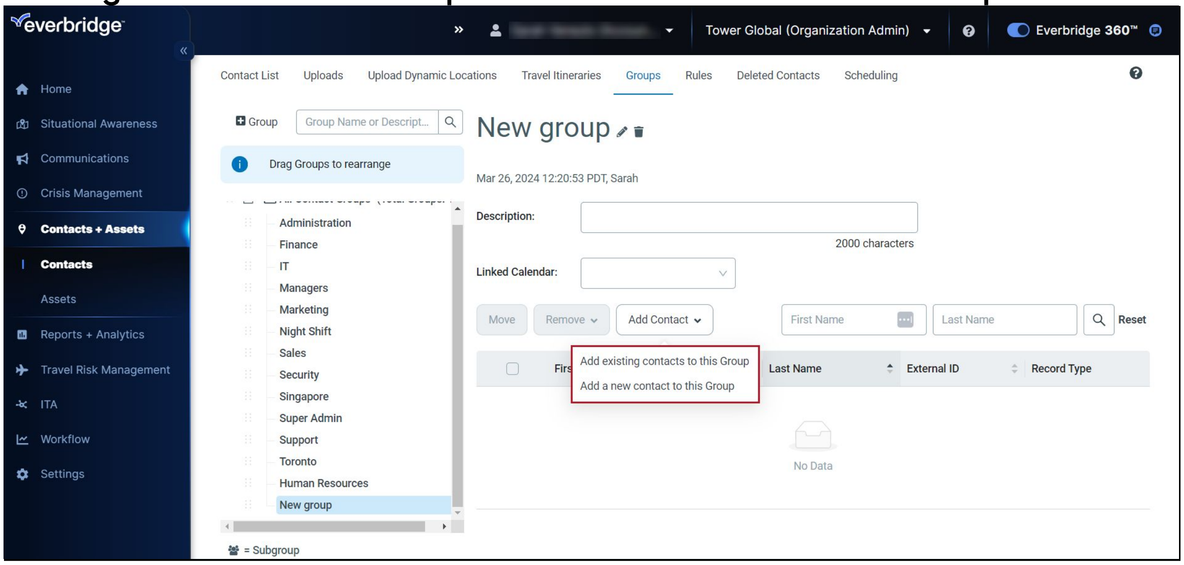
By adding a set of groups before you need to send a Notification, you are ready to respond quickly.

Add a group

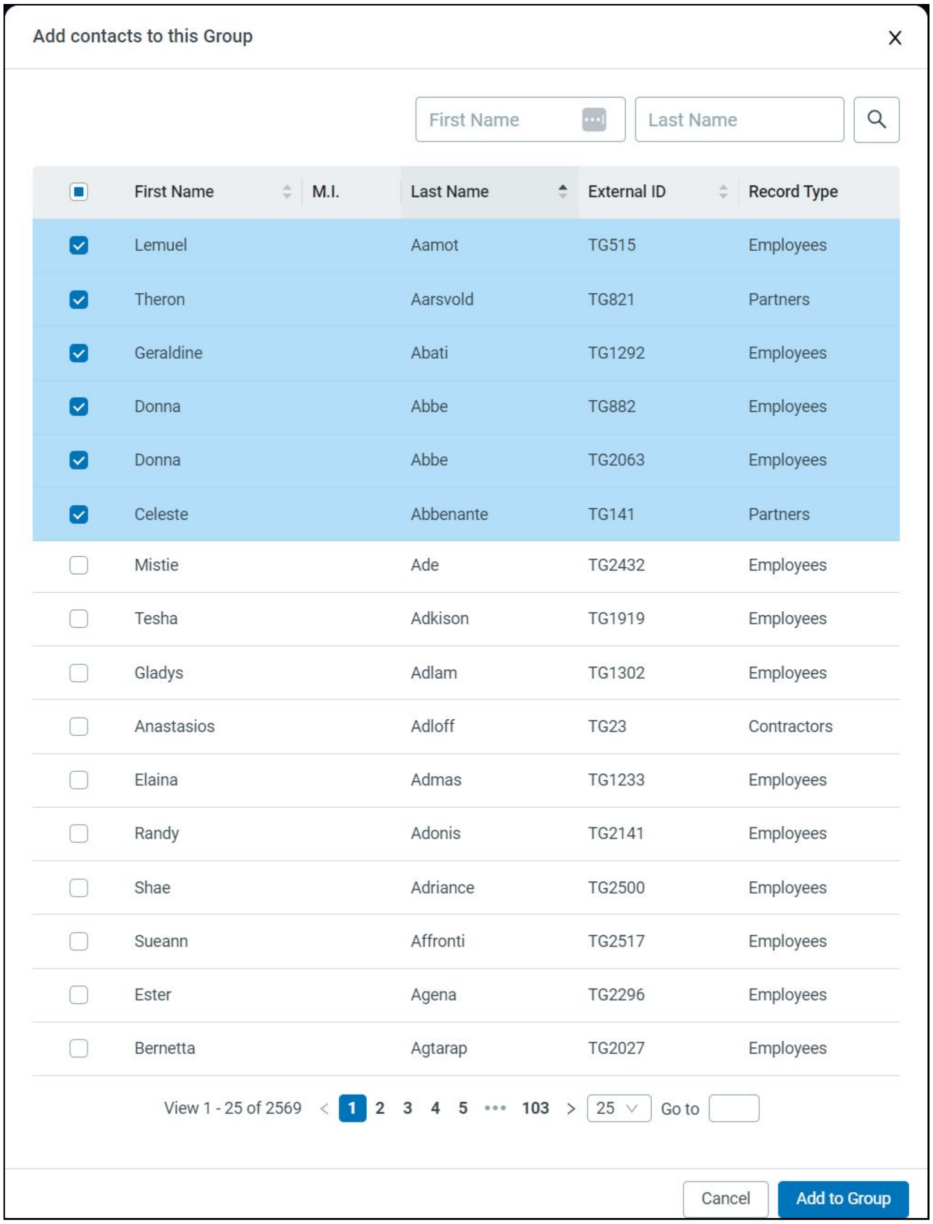
To add a new group:

1. From the **Contacts** tab, select **Groups**.
2. On the left-hand panel, select **All Contact Groups** or the desired group name if you want to nest a group within a group.
3. Click **+Group**, above the list of existing groups.
4. Type a name for your new group and press ENTER. The new group will open after being created.
    - Optionally, in the **Description** field, enter a description of the group using a maximum of 2,000 characters. Your description is automatically saved. (To modify the description, simply type in the Description field.)

5. Select **Add Contact**, above the list of Contacts. Then, select either **Add existing contacts to this Group** or **Add a new contact to this Group**.



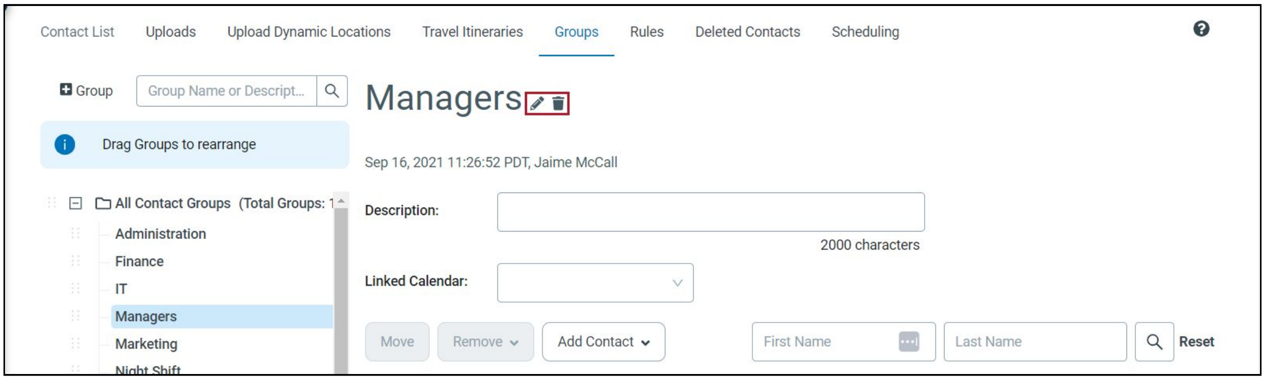
6. The **Add Contacts to this Group** dialog appears. Select the checkboxes of the contacts you want as a part of this new group and click **Add to Group**.



7. The list of contacts appears. Optionally, in the Description field, enter a description of the group using a maximum of 2,000 characters. Click **Done**. (Click Edit to modify the description. Then, click Done again.)
8. Optionally, in the Linked Calendar field, select the desired calendar from the drop-down list. This feature is only enabled when Scheduling is enabled. (Click Edit to select a different calendar. Click the X to delete the current calendar. Then select from the drop-down list.)
9. To order the contacts within a group, select the **Add a sequence** checkbox. (See To order the contacts within a group.)

Manage Groups

To edit or delete a group, select either the **Pencil** or Trash **icons** next to the group's header.



NOTE: You cannot delete a dynamic group from the **Contacts** tab. Instead, the Account Administrator deletes a dynamic group from the assigned role (using the **Roles** tab).

Rearrange Groups

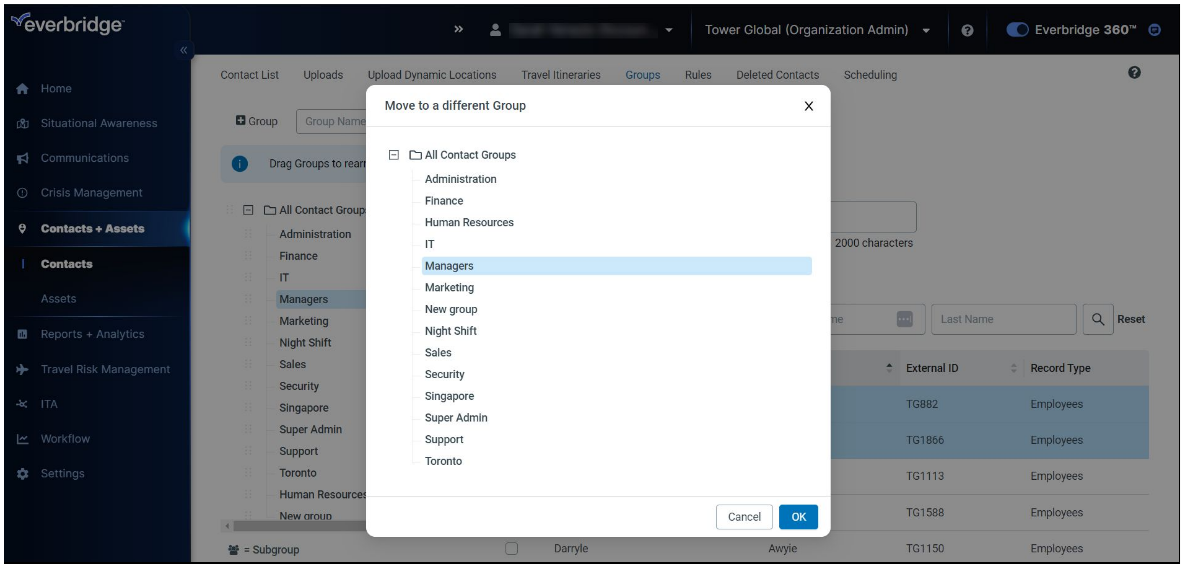
To rearrange groups:

1. In the **Search** field, type a group name or part of a group description. The **Results** list appears:
   - **Group Name**: Type all or part of the group name you want to rearrange and press ENTER.
   - **Description**: Type part of the Description you entered for this group.
2. Drag the group name to its new location.

Move Contacts Between Groups

To move contacts from one group to another:

1. From the **Groups** subtab, select or search for the desired group name.
2. In the right-hand pane, select the checkboxes of the contacts you want to move from the group.
3. Click **Move**. The **Move to a Different Group** dialog appears.



4. Select the group name to move the selected contacts to and click **OK**. The selected contacts are moved to the other group and are no longer contacts in the current group.

Ordering Contacts Within a Group

If your Organization has enabled **Sequenced Groups**, you can order the contacts within a group. Later, when creating a Notification, you can select this group, turn on Sequencing in the Notification, and enter a wait time between contacts. Leave Sequencing off to use it like a standard group.

> **NOTE:** The Sequenced Groups feature is available only if your Organization also has Incident Communications enabled.

1. From the **Groups** subtab, select or search for the desired group name.
2. Select the **Add a sequence** checkbox. The contact names are numbered sequentially by last name.
3. To reorder the numbered contacts, drag-and-drop and/or manually reorder:
   a. **Drag-and-Drop:** On the displayed page, you can drag-and-drop a name to reorder it. Select the Sequence header, select the contact to be moved, and drag the name to its new order.
   b. **Manually change the order number**: Select the number next to the contact name. A **Move to Position** dialog appears, from which you type the desired order number and click **Move**.

> **NOTE:** You can type only numbers, but not "0" (zero) or a number after the last person in the group.

To remove contacts from a group or a group and its subgroups:

1. From the **Groups** subtab, select or search to the desired group name.
2. In the right-hand pane, select the checkboxes of the contacts you want to remove from the group or the group and all its subgroups.
3. From the **Remove contacts** drop-down list, select either **from this Group** or **from this Group and its subgroups**.
4. Click **Yes** to confirm you want to remove the contacts from the group.
5. Look at the list of contacts. The selected contacts are removed from the group.

Linked Calendars

If the Scheduling option is enabled, the **Linked Calendar** field appears on the **Groups** page. Linking a group to a calendar allows you to send a Notification to on-call staff of the linked calendar. To link a calendar:

1. Click **Select.**
2. Select the calendar you want to link.

You can also select a different calendar by clicking **Edit** or delete the current calendar by clicking the **X**.

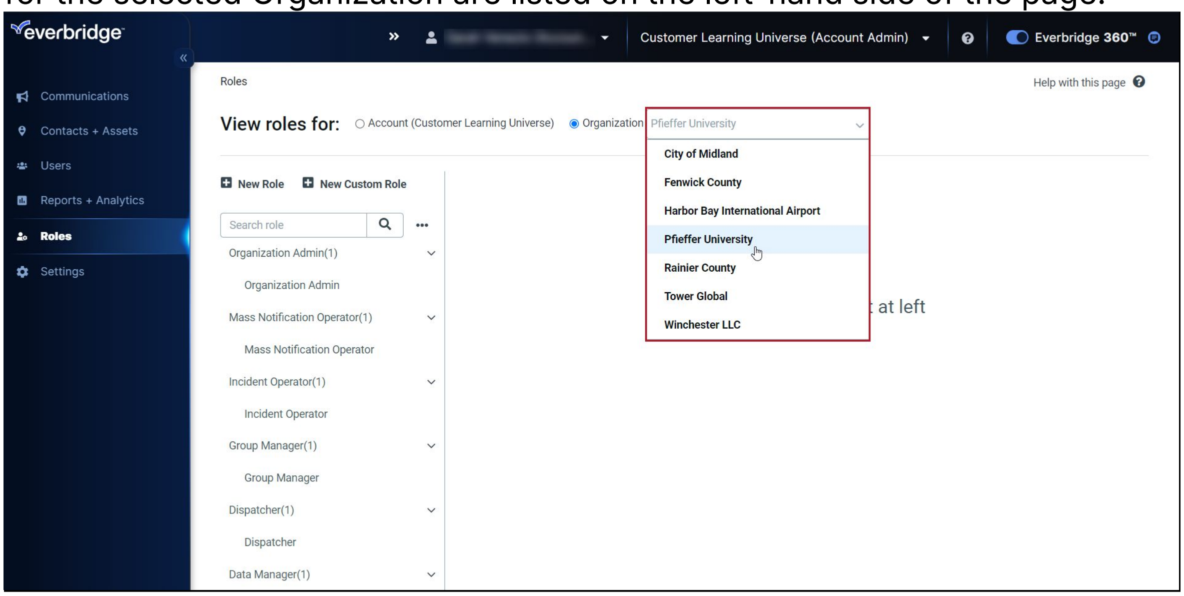
> **NOTE:** Users can see that a group is attached to a calendar, but will only see which calendar if they have access to view it.

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.

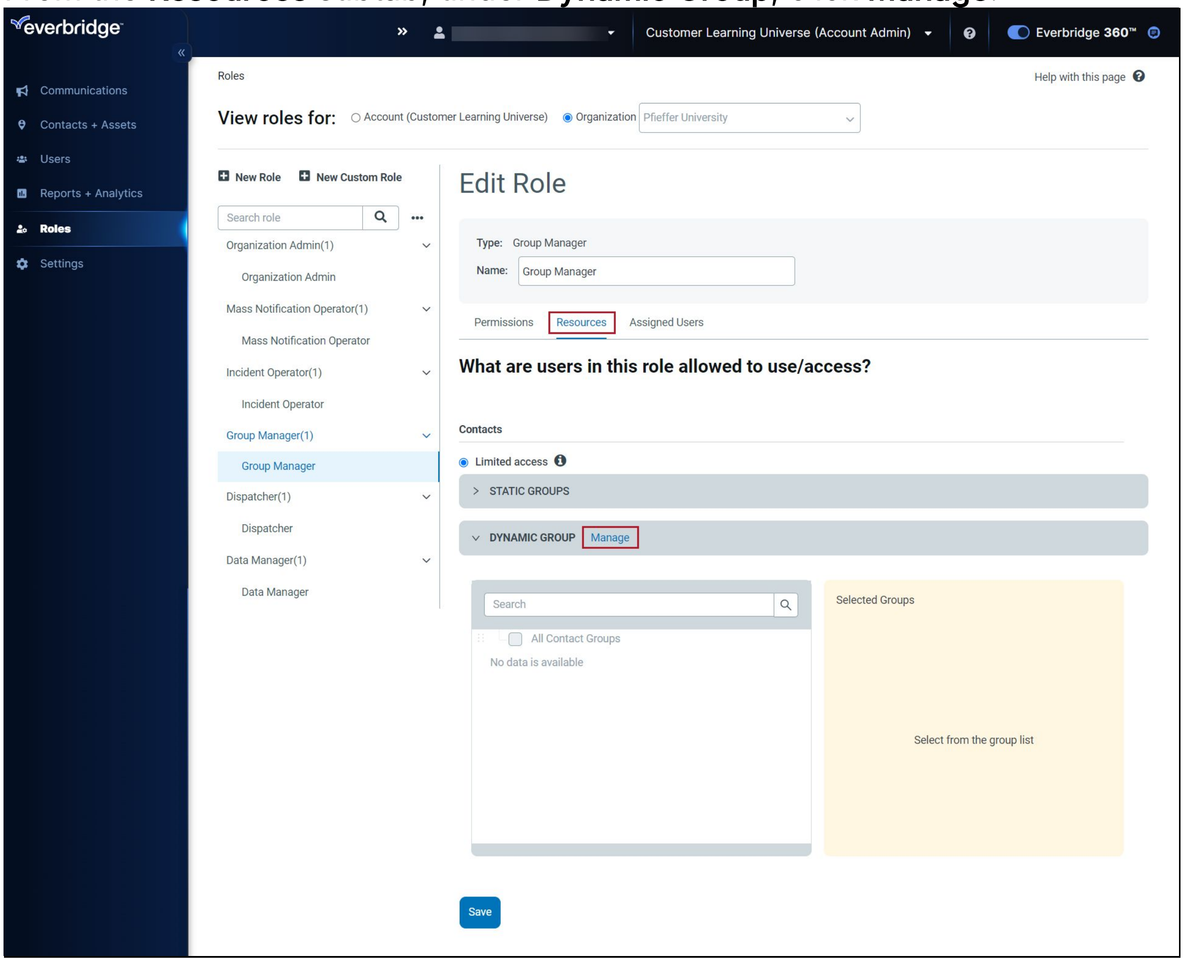
To manage dynamic groups:

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.

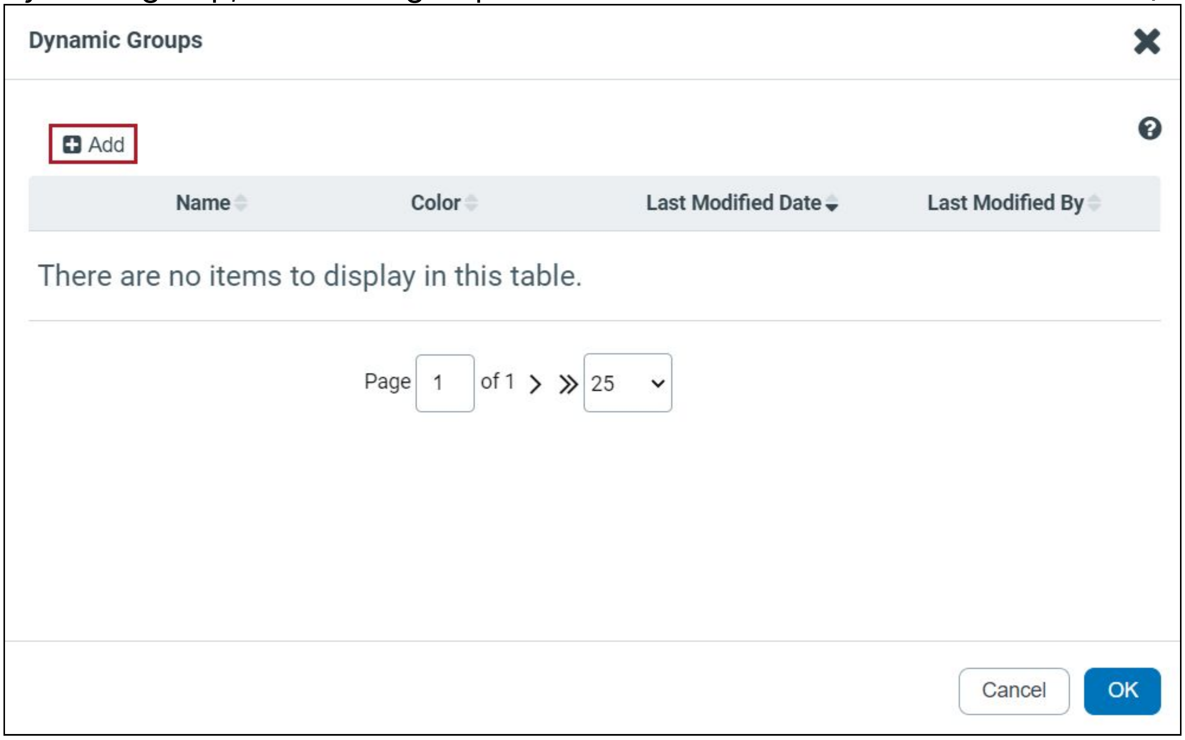


5. Select the **Role Type: Group Manager** and the role you added under this role type (for example, Group Leader). The right-hand side of the page shows subtabs:
   a. **Permissions** - Scroll down the page to see the permissions of this particular role. The permissions are locked because the new role 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**.

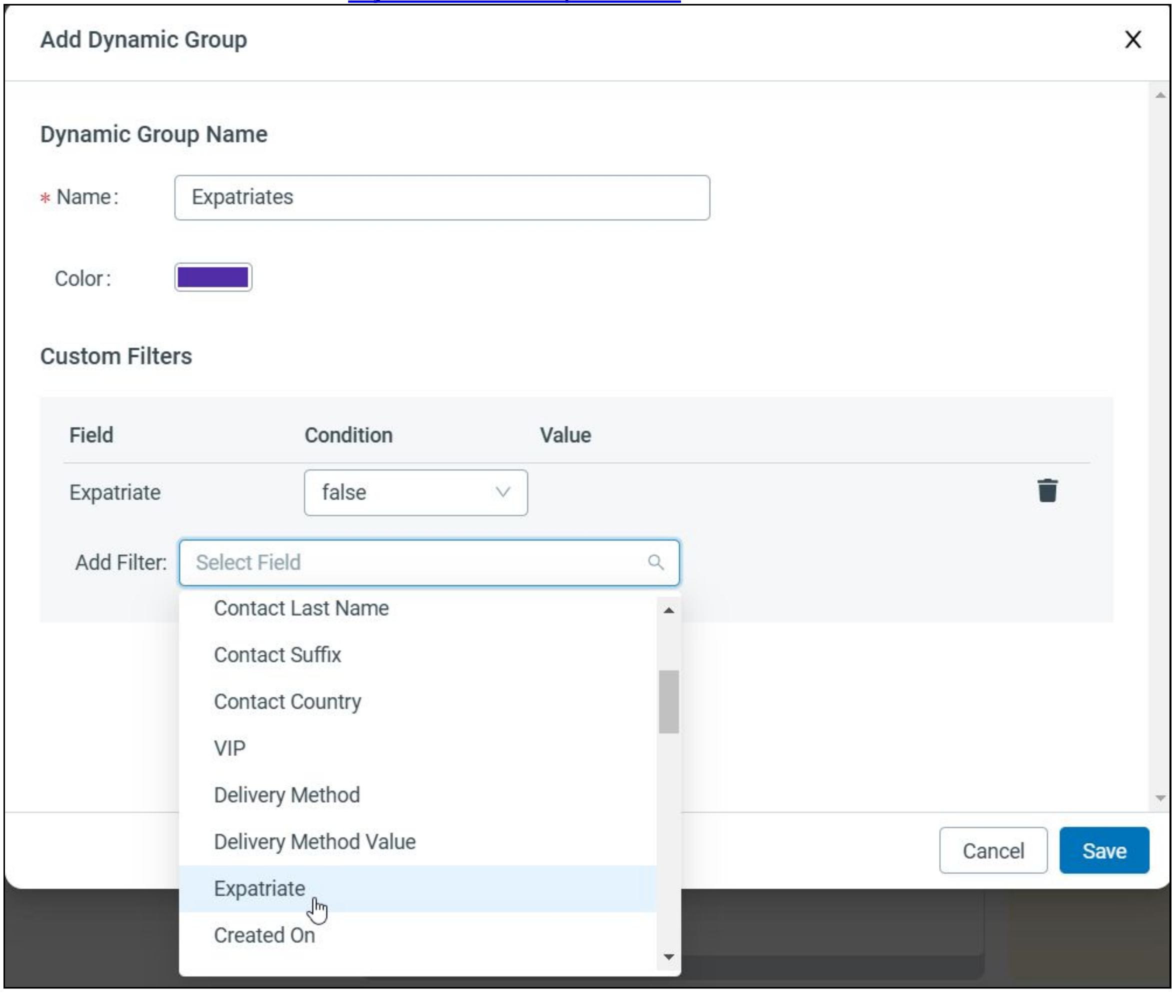


8. The **Dynamic Groups** dialog appears. Click **Add** (or to edit an existing dynamic group, select the group name from the list and click the Pencil icon).



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:

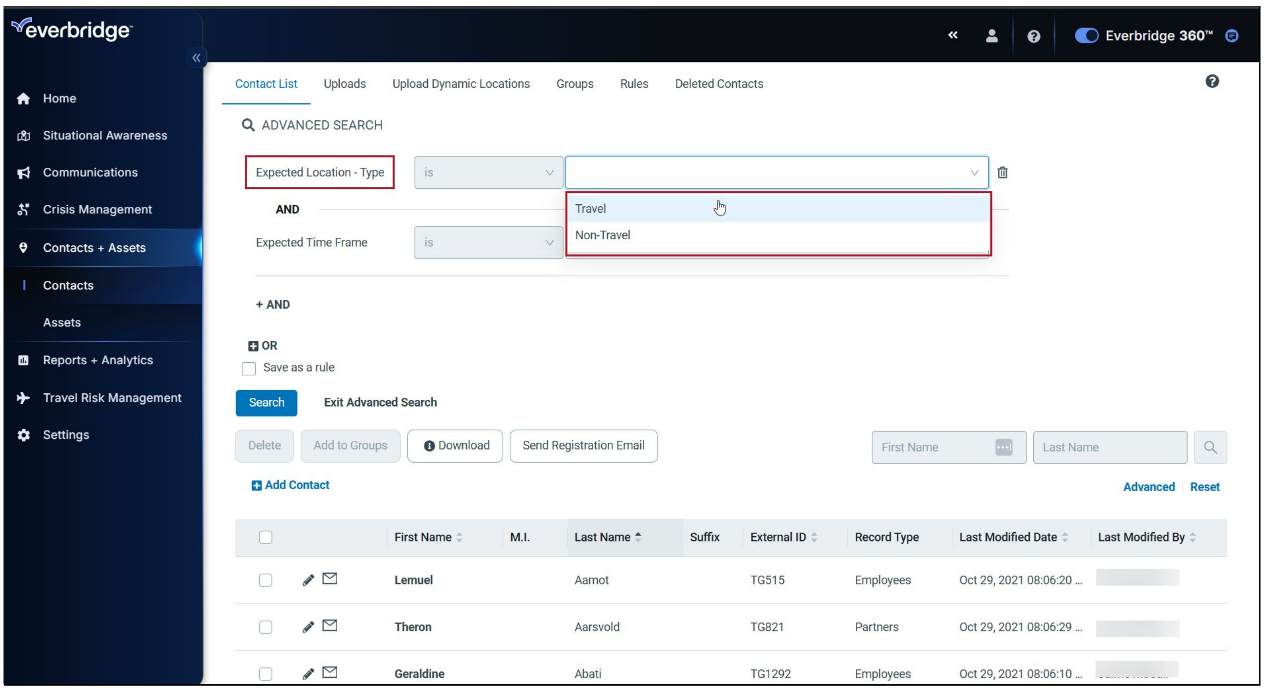
Field Type	Field Name
Contact Details	Linked User
Contact Details	Contact External ID
Contact Details	Contact First Name
Contact Details	Contact Middle Initial
Contact Details	Contact Last Name
Contact Details	Contact Suffix
Contact Details	Contact Country
Contact Details	VIP
Contact Details	Delivery 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.



Create Rules

Preparing messages, lists of recipients, and other aspects of the Notification in advance reduces the chance of human error in sending and responding to Notifications. Rules are another way to organize your contacts for quick selection.

Rules

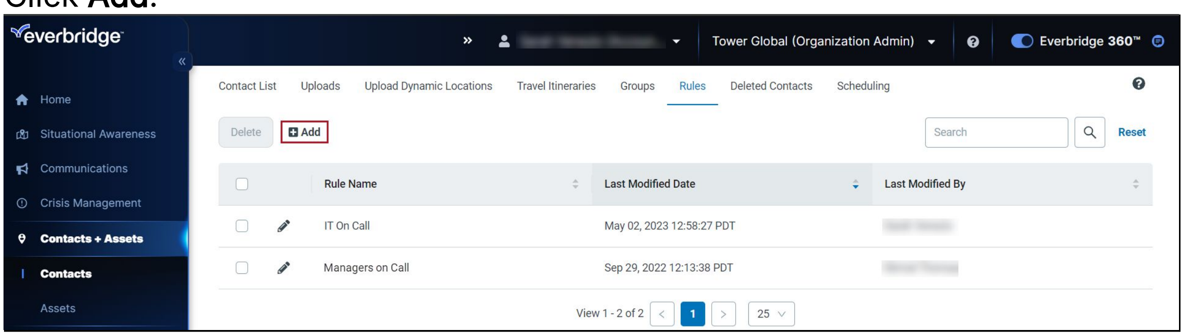
When you send a Notification, you can apply a rule based on the characteristics of the contacts who will receive the message. Rules are a dynamic way of selecting contacts using multiple filters based on their contact information, such as Name and Location, or Additional Information, that is custom to your Organization. So, even if new contacts have not yet been added to the “Fire Department” group, they could still be located at a Fire Station address where they have an address in the area.

If the information in a contact record is current, then the information the rule uses is up-to-date as well. You do not have to “maintain” or update the information in the rules separately.

Add New Rule

To add a new rule:

1. From the **Contacts** tab, select the **Rules** subtab.
2. Click **Add**.



3. Type a name for your new rule.
4. Select a field from the **Add Filter Search** drop-down list.
5. See Filtering Your Search for details and examples.
6. Select the Condition from the drop-down list and type the Value.

> **NOTE:** When using groups in rules, select Calendar as the condition. For details about groups in rules, see Understanding How Sequenced Groups Work in Rules.

7. Optionally, select:
   AND-set up another field-condition-value to be included in the rule.
   OR-set up a different field-condition-value to be included in the rule.

> **NOTE:** When a rule includes "OR" logic in the search conditions, you will be unable to see it in the Universe > Filter > Existing rule list. By design, the rule is hidden.

8. Repeat Steps 4 through 7 for each additional filter you need to use. (You can add up to 10 "OR" filters.)
9. Optionally, click **Contact Preview** to see the contacts matching your new rule.
10. Click **Save**. The new rule is listed in the Rules list.

Edit a Rule

1. If you have numerous rules, use the Search feature to find it.
2. Click the Pencil icon in the same row of the rule. The Update Rule page appears.
3. Make your changes.
4. Click **Save** after you have modified your rule.

Download a List of Contacts Based on a Rule:

1. Click the Pencil icon in the same row of the rule. The **Update Rule** page appears.
2. Click **Download**. A list of contacts in a CSV file based on your rule is downloaded.

Delete a Rule:

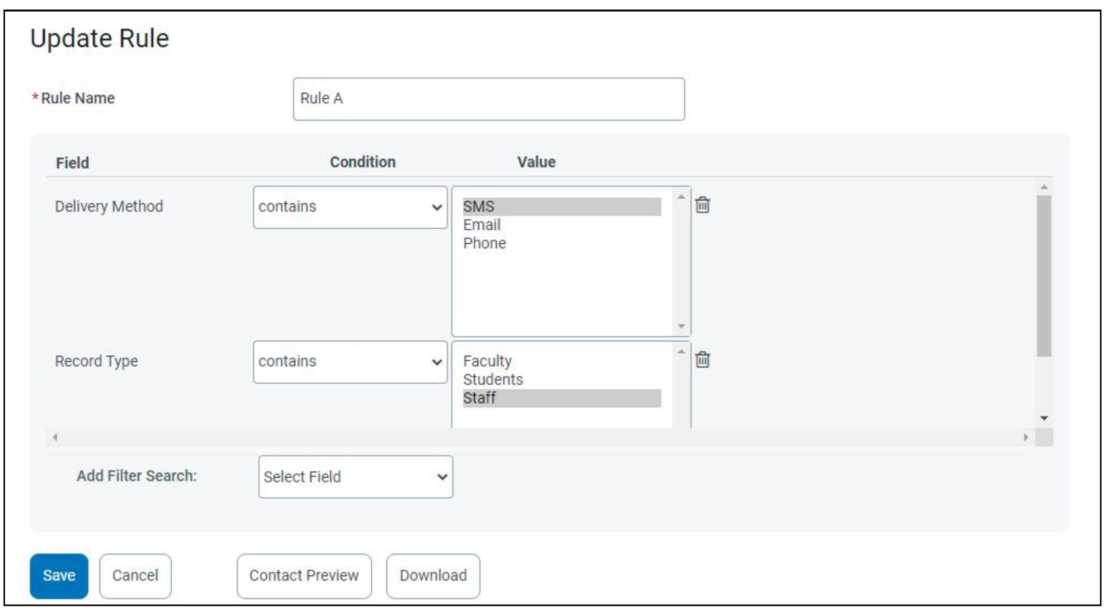
1. Select the checkbox next to the rule to be deleted.
2. Click **Delete**.
3. Confirm the deletion.

Understanding How Sequenced Groups Work in Rules

In the **Groups** pane, you will see the type of group: standard (no icon) or sequenced ( ). If Sequencing is turned off in Settings, the sequenced group displays as a standard group.

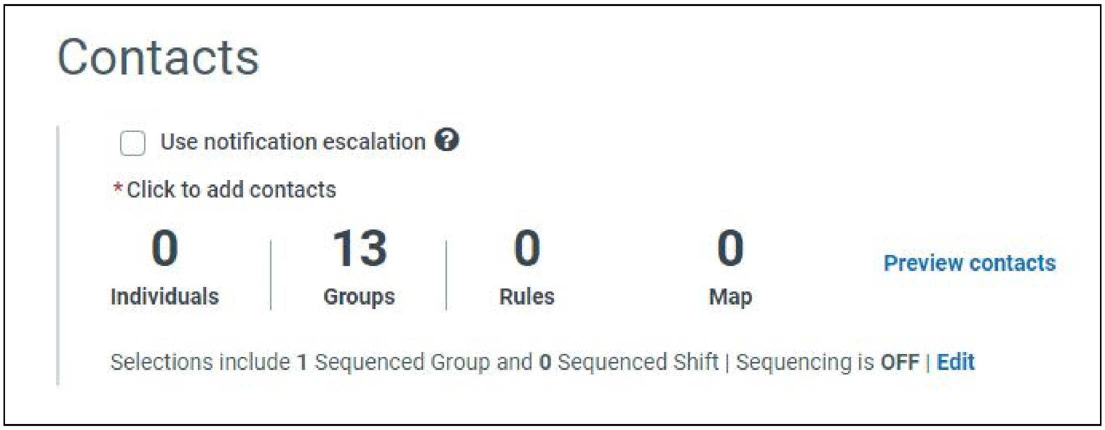
The following workflow is provided as an example:

- **Contacts** > **Groups**:
  - Administrators, a sequenced group, consists of three contacts:
    - Contact 1 works the Monday shift
    - Contact 2 works the Monday shift
    - Contact 3 works the Friday shift
- **Contacts** > **Scheduling**:
  - Make sure your calendar (Primary On-Call in this example) is ACTIVE
  - The Fourth Shift is part of the Primary On-Call calendar
  - The Administrators group is linked to the Fourth Shift
- **Contacts** > **Rules**:
  - The criteria for Rule A is the Primary On-Call calendar and Fourth Shift, Monday, as shown in the following graphic. The Date Range must be a range from a specific date to at least the next day. For Monday, choose a Monday in the first Date Range and select Done. Then, select at least the next day and select Done. (Similarly, the criteria for Rule B is the Primary On-Call calendar and Fourth Shift, Friday.)

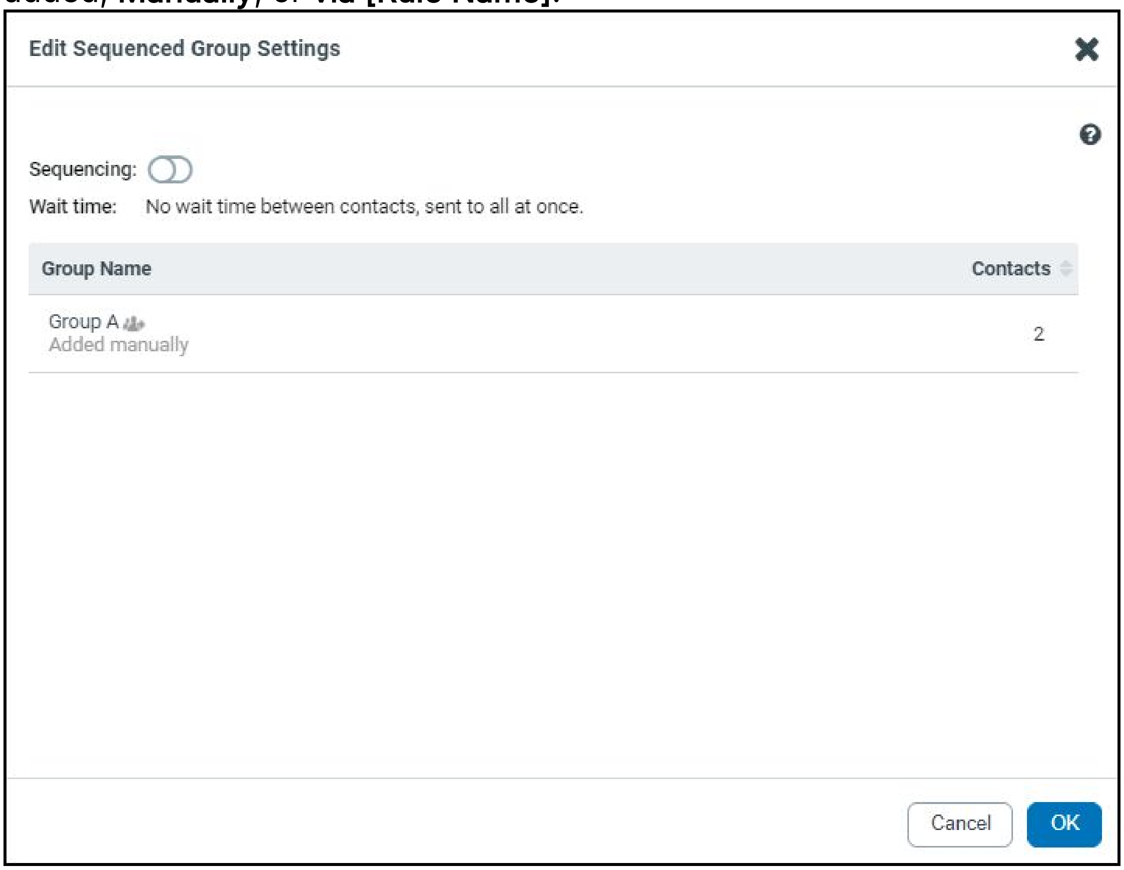


  - Click **Preview** to see the contacts in this rule.
- **Notifications**:
  - In your Notification, when you select Rule A as one of your Rules from the Contacts section, since Rule A includes a Sequenced Group, you

must select the Edit link to see the Edit Sequenced Group Settings dialog.



The **Edit Sequenced Group Settings** dialog shows the group name and how it was added, **Manually**, or **via [Rule Name]**.



When you toggle the Sequencing to ON:

- In the **Wait Time** field, enter a number in minutes or hours (from the drop-down list) between contacts. (The default wait time is 5 minutes.)
- In the **Default Responses Needed** field, set this number so that you do not need to change it each time in the template. Setting this number can also be used for groups where Sequencing is turned off, then on again. For example,

if you set up a rule that uses the Calendar filter with On Shift set to Now, the contacts returned would be different each time depending on the time of day.
- The Responses Needed column defaults to 1. The maximum responses are the maximum in the Count column. If you keep the Responses Needed: 1, and escalations are used (Total Responses Needed: 1), the Notification stops sending as soon as a contact from the Sequenced Group responds.

Or, if you keep Responses Needed: 1, and the escalation Total Responses Needed is 2, for example, then the Sequencing stops, but the Notification escalates until it gets the second response.

Upload a Contact Data File via the Manager Portal

Perform the following procedure to manually upload a Contact data file. **Step 5** provides the option for you to add (Update), replace, remove (Delete) contacts, or restore deleted contacts.

Before uploading a Contact data file using either the web-based interface or via SFTP, Everbridge recommends you make a backup of your current file. Follow the procedure below.

To make a backup of your current Contact data file:

1. From the **Contacts** tab, select **Download**. A CSV file is downloaded to your desktop. Its filename is your OrganizationName_contacts_ and a number.zip.
2. In case you need to revert to this data file, you have it available on your desktop

Reminders

1. You must use the downloaded CSV file from the **Deleted Contacts** subtab in order to restore deleted contacts.
2. The **Restore** option does not update contact information; it only reactivates a deleted record.
3. Make sure the latest upload status is **Done**. Do not add, edit, or delete contacts during a contact restore. Do not restore contacts if the upload status is **In Progress** or **Geocoding**, during canceling, or when other users add, edit, or delete contacts in the Organization. (Refer to Deleting or Restoring Contacts for details.)

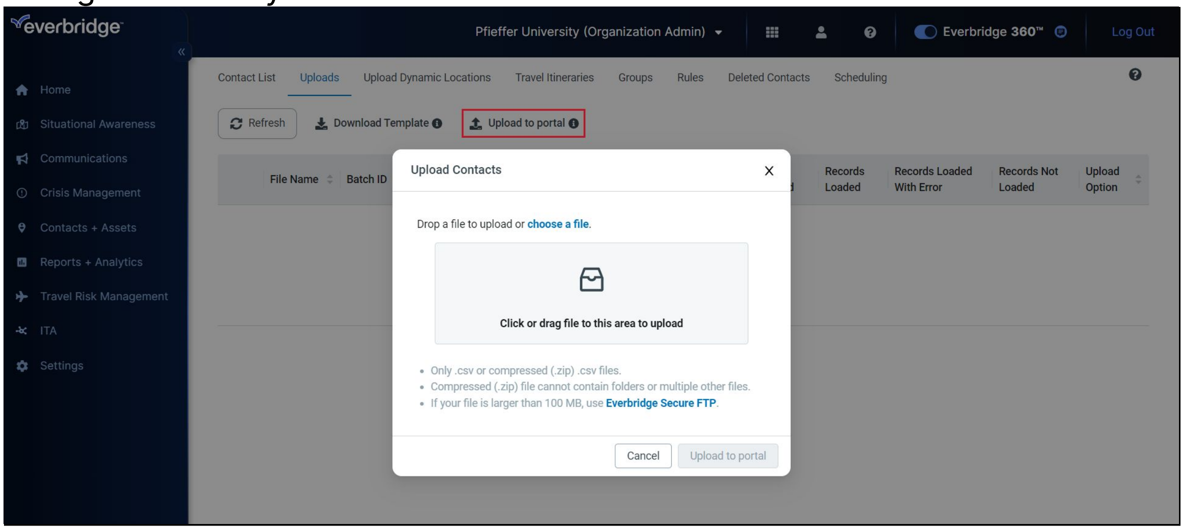
Upload Contacts

As a reminder, we strongly encourage downloading a backup of your contacts before uploading new files.

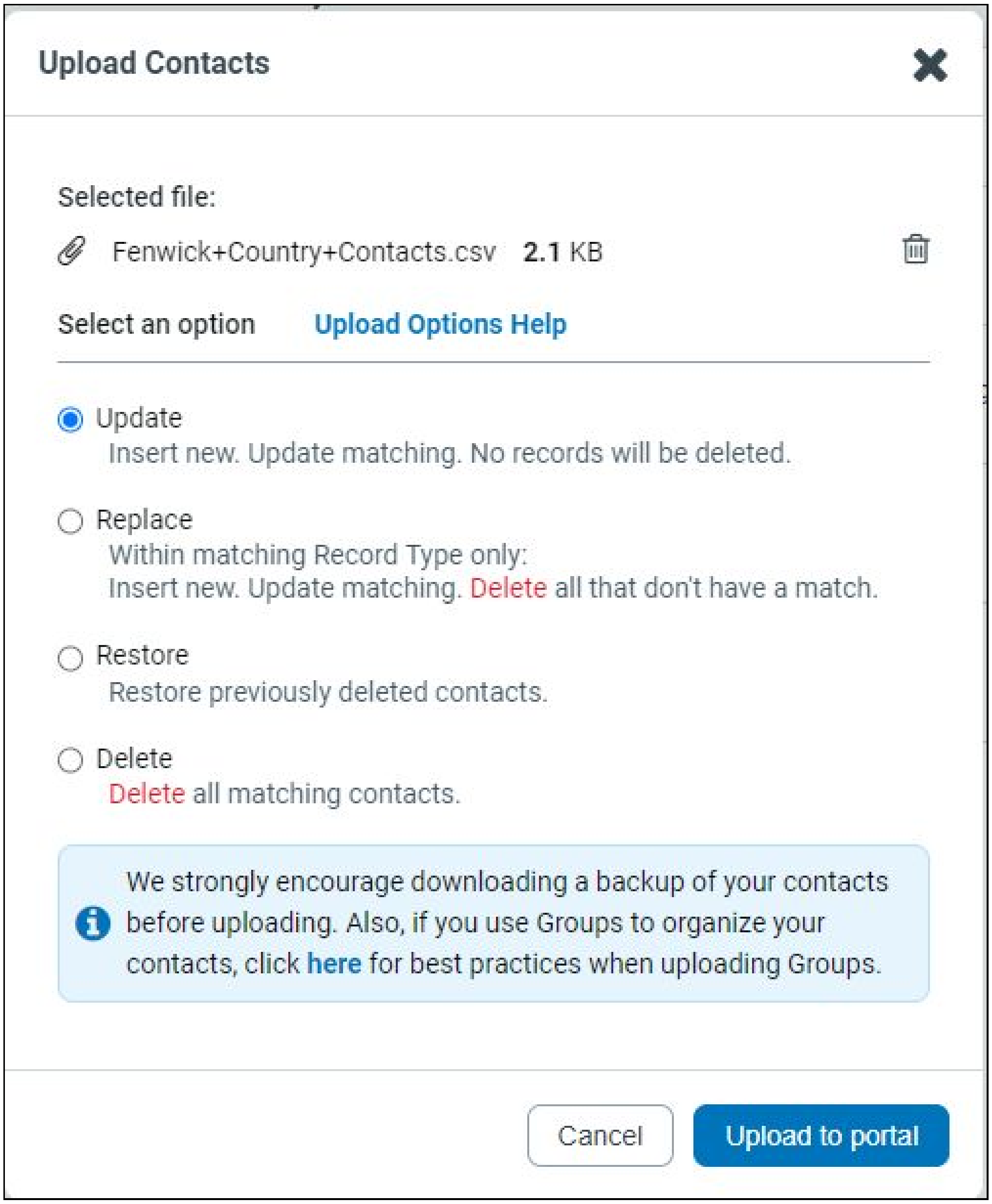
To upload a list of Contacts using the web-based interface:

1. From the **Contacts** tab, select **Contacts** if needed, then click **Uploads**.
2. Click **Upload to portal**. The **Upload Contacts** dialog appears.

3. You can drag a file to the dialog box or click **choose a file** to open a second dialog to browse your device's files.



   a. You can upload a CSV file, TAR.GZ file, or compressed (ZIP) CSV file. The maximum CSV, TAR.GZ, or ZIP file size is 100 MB. When more than 100 MB, use Secure FTP. (See Uploading a Contact Data File Via Secure FTP.)
4. Locate your file to upload, and either double-click its filename or select the filename and click **Open**.
5. Select one of the following:
   a. **Update**—Only insert new contact records and update existing contact records.
   b. **Replace**—Replace all contact records with the matching recordType in the CSV file.
   c. **Restore**—Restore previously deleted contacts. Restore will overwrite existing contact records that have the same External ID.
   d. **Delete**—Delete all the contact records that match the records in this file.
6. To process the file, click **Upload to portal**. An Alert message appears.
7. Click **OK**. You are sent two automated emails:
   a. One that the contact data file was received
   b. Another that the contact data file has been processed.



There are six stages in file processing contact data.

- **Queuing** - The records are preparing for updating or insertion into the database.
- **In Progress** - The records are updating or being inserted into the database.
- **Geocoding** - Addresses with no latitude and longitude are processed to add the location; otherwise, if already done, no geocoding occurs. It could take a while to process the geocoding. The contacts that are not map-based are available for a Notification. Once geocoding is complete, contacts can be selected from the map. Review the following about geocoding:
    - You can geocode any location, domestic or international.
    - The geocoding process supports foreign language characters, making geocoding global locations quick to locate.

    - Each location that is defined for the contact displays on the Universe view.
    - When you enter an address, it could be geocoded. That is, the latitude and longitude of the address are verified to be a location on Earth. If you enter your own latitude and longitude, the geocoding is not verified.
    - Assuming the contact records pass the most critical validation tests, all records are immediately loaded in the database as the file is processed. This ensures the contacts are available for a Notification even though the upload is waiting for the "Geocoding" results to return. While waiting, any address submitted without a Latitude/Longitude does not have its pair of values in the database record and is not available for selection on the map; however, the address record is available for filtering with a Rule or Advanced Search feature from the Notification workflow.
    - Everbridge Suite attempts to geocode any address submitted via the CSV file if the Latitude X and Longitude X fields are empty in the file - even if the address was submitted in a previous file and geocoded in a previous upload. Suppose your first upload file includes 8,000 addresses and all the addresses in that CSV file get geocoded. If you upload a subsequent file with 8,001 addresses, where only one address is new but no Latitude/Longitude is provided in the file for any address, then Everbridge Suite attempts to geocode all the addresses again (not just the new address).
- **Canceled** - The upload was canceled. If you need to cancel the upload, click **Cancel**. During the **In Progress** stage, only data before the cancellation is saved. During the **Geocoding** stage, only the addresses are saved, but not their corresponding latitudes or longitudes.
- **Failed** - The records failed to upload.
- **Done** - The system sends an email. In addition, when the upload is complete, the map tiles for the contact layers are refreshed if you loaded addresses for contacts.

To verify or preview the uploaded contacts, read the next section.

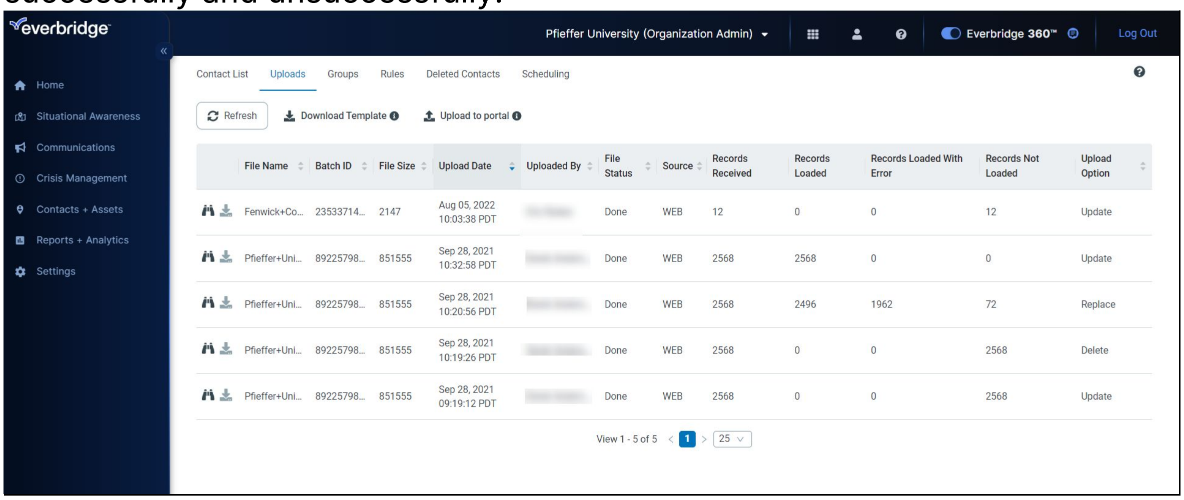
Download the Contact File

1. From the **Contacts** tab, click **Uploads**. Your list of uploads appears.
2. Click the **Download** icon in the row of the upload file you want to save. You will receive an alert popup confirming the download. The file will be delivered to your email after processing.
    1. The Download icon is disabled for files that have expired (30 days after upload) or for files that failed.

View the Upload Results

To see the upload results:

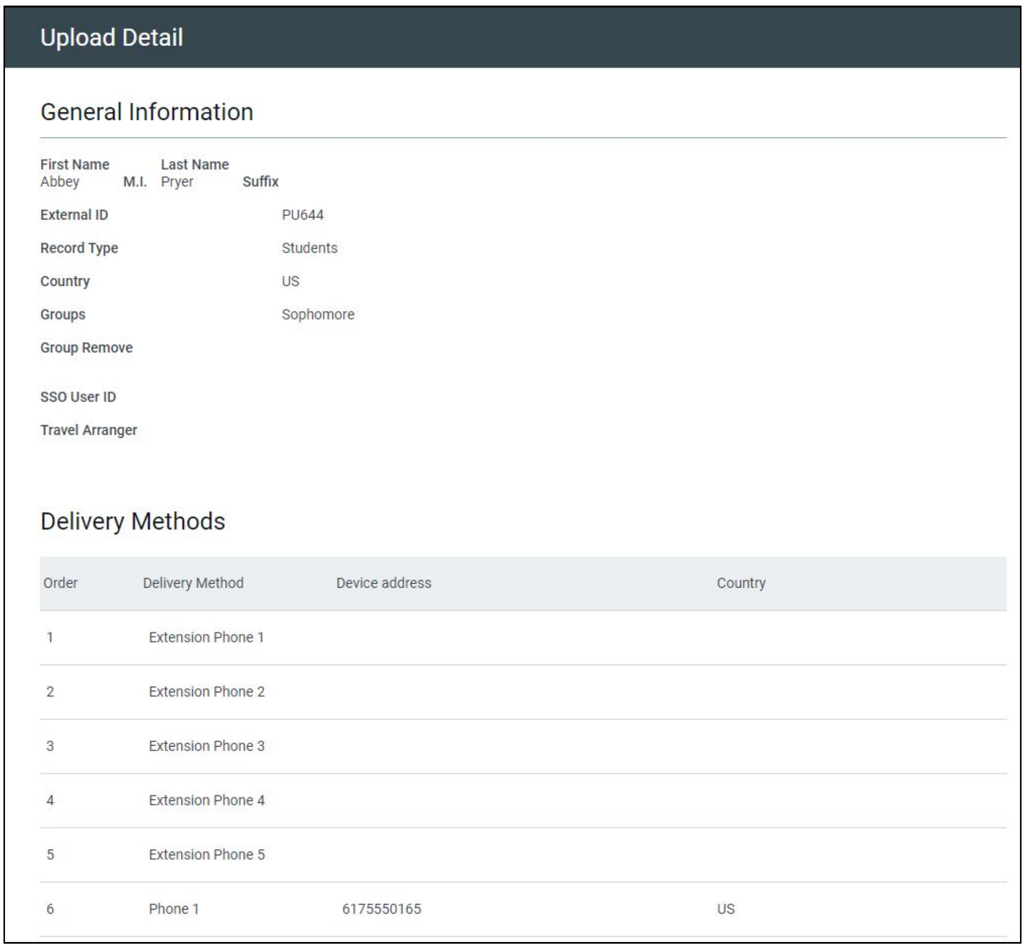
1. From the **Contacts** tab, click **Uploads**. The list of uploads appears.
2. Check the **File Status** column. A status of "Failed" means no records were received or loaded from the file. (Failed uploads can occur because File Encryption is ON. Turn OFF File Encryption and upload again.)
3. Refer to the **Source** column to check what means were used to upload these records.
4. Hover over the row of the upload file you want to review to highlight that row. Initial Upload Results are displayed including which records loaded successfully and unsuccessfully.



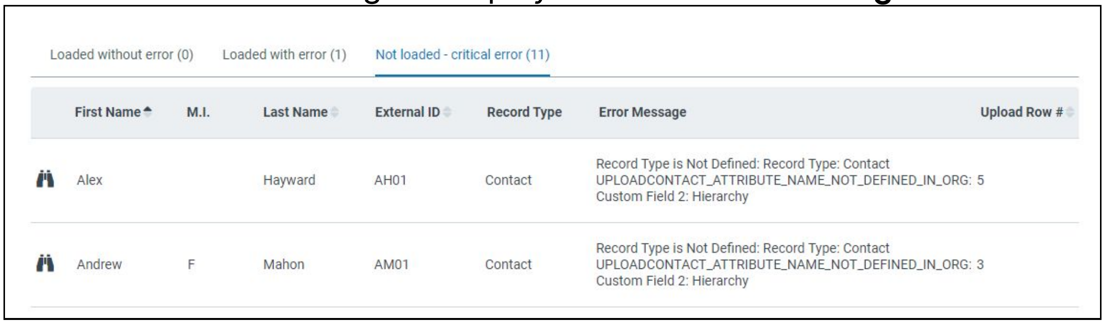
5. For a deeper view of an individual file upload, click the **View** icon on the left side of a specific row. The contact records that were received are listed on one of the three results tabs:
   a. **Loaded without error** - Records loaded normally.
   b. **Loaded with error** - Records that had something incorrect, but there was enough good information to load them anyway. Click **Download** to download a new file and fix the errors before uploading again.
      i. Upload errors can be identified in the far column under **Upload Row #**
   c. **Not loaded - critical error** - Records that had severe errors were not loaded. Click **Download** to download a new file and fix the errors before uploading again.

i. Upload errors can be identified in the far column under **Upload Row #**

6. Note the following example results.
   - **Loaded without error (nn),** where nn is the number of contacts loaded without error.
     - Clicking the View icon next to a contact's name displays the contact information.



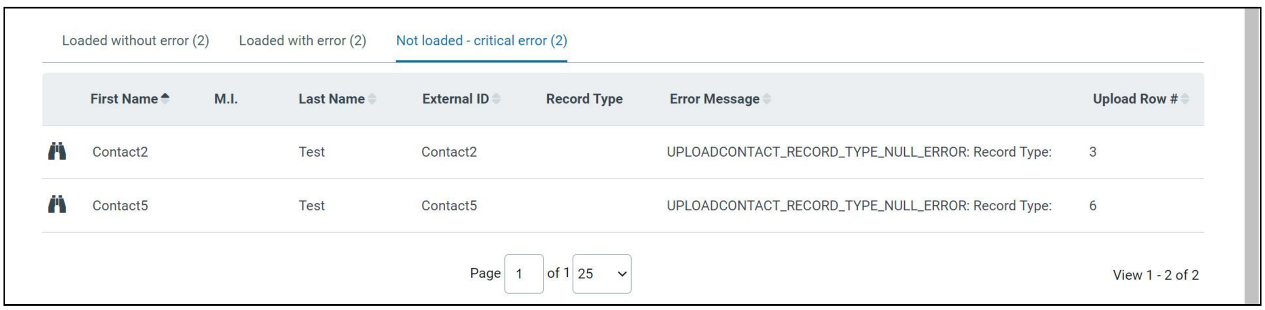
- **Loaded with error (nn),** where nn is the number of contacts loaded with errors. The Error Message is displayed in the **Error Message** column.



Loaded without error (0) | Loaded with error (1) | Not loaded - critical error (11)

	First Name	M.I.	Last Name	External ID	Record Type	Error Message	Upload Row #
	Alex		Hayward	AH01	Contact	Record Type is Not Defined: Record Type: Contact UPLOADCONTACT_ATTRIBUTE_NAME_NOT_DEFINED_IN_ORG: Custom Field 2: Hierarchy	5
	Andrew	F	Mahon	AM01	Contact	Record Type is Not Defined: Record Type: Contact UPLOADCONTACT_ATTRIBUTE_NAME_NOT_DEFINED_IN_ORG: Custom Field 2: Hierarchy	3

- **Not loaded - critical error (nn)**, where nn is the number of contacts not loaded from the CSV file.
  - An example error message here could be: **UPLOADCONTACT_RECORD_TYPE_NOT_FOUND_IN_ORG: Record Type: Opt-In**. In this case, configure **Settings > Organization > Contacts and Groups > Contact Record Types** by adding the Opt-in record type.



Loaded without error (2) | Loaded with error (2) | Not loaded - critical error (2)

	First Name	M.I.	Last Name	External ID	Record Type	Error Message	Upload Row #
	Contact2		Test	Contact2		UPLOADCONTACT_RECORD_TYPE_NULL_ERROR: Record Type:	3
	Contact5		Test	Contact5		UPLOADCONTACT_RECORD_TYPE_NULL_ERROR: Record Type:	6

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Upload Messages

Message	Possible Problem	How to Correct
Your file was not loaded; some or all column headings are not in the correct format. Download the contact upload .csv file, or check the help file for more information.	One or more column header names were all in lower case or upper case.	Download the CSV Template from the Uploads page to review the expected column header name format.

Your file was not loaded; a required column is missing. Download the contact upload .csv file, or check the help file for more information.	One or more required columns missing from the file.	See the Contact Upload Data Table for a description of each column.
Your file contained unexpected columns that were ignored in the upload. See upload results below.	One or more columns were not expected; the data values in the unexpected column are not loaded.	Remove unexpected columns or correct column names. Download the CSV Template from **Uploads** page to review the expected column header names.
Your file was not loaded; the data and columns do not align. Check your file and try uploading again.	The number of data values for one or more rows does not match the number of column headers.	Either remove any commas from data values or enclose the data value with double quotes.

Click **Contacts** to return to **Upload Results**.

- If your browser is configured to open in a new tab, you will see two Contacts tabs in the browser. The one to close is the right-most one.
- If your browser is configured to open in a new window, close that window.

Contact Upload Considerations

Consider the following information when uploading contacts:

1. CSV-formatted files containing contact information can be uploaded from the Account or the Organization. Always include the **Organization Name** heading in **Column A** when loading a CSV file from the Account level.
2. The following columns cannot be empty for any contact record:
    a. **First Name**
    b. **Last Name**
    c. **Record Type** - Ensure you define the record types in the Organization Settings before you upload the first file.
    d. **External ID** - Keep your External ID formats uniform and consistent.
3. If you use a tool to edit the CSV file, then that tool might have its own limitations for the number of characters you can enter in one cell (for example, the maximum characters per cell when using Microsoft Excel is 32,767 characters); however, if you use a text editor to edit the CSV file, then there are no limitations. Also, regardless of the number of digits displayed, Microsoft Excel stores numbers with up to 15 digits of precision. If a number contains more than 15 significant digits, Microsoft Excel converts the extra digits to zeros (0).
4. Leaving a column empty for a record produces different results than when you omit the column from the CSV file; see the details for the desired column in the Contact Upload Data Table.
5. The upload process will still continue even when there are line breaks between contact records in the data file.
6. Some information for a contact requires a value in more than one column:
    a. **Contact Location**: Each location consists of a location name, a complete street address, and, optionally, a Latitude/Longitude pair.
    b. **Custom Fields**: Custom information you add or update for a contact requires the Custom Field name and the custom value pair. (Ensure you define the **Additional Information** fields in **Settings** > **Organization** > **Contacts and Groups** before you upload the first file.)
7. If you are automating uploads and have a Member Portal, Everbridge recommends that you not allow the External ID to be edited. For example, if the contact changes a required field, then when you update your contacts (via SFTP, manual upload, or API), a new record would likely be created if one of the required fields is different when uploaded. The update would not see someone with the same fields to update, and would then assume this is a new contact record to add. Then, because of the new record, the system would not update the intended contact and there would be two records that are out of sync (and continue to be out of sync without manual intervention). Likewise, if using a Delete or Replace file, because the system is looking at

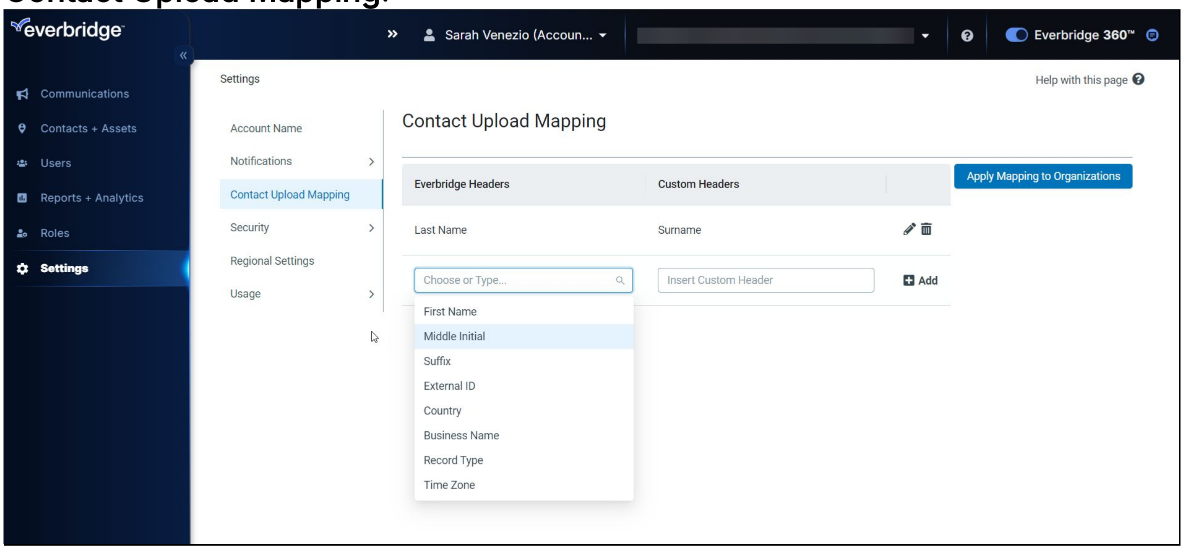
the four required fields that do not match the update, the contacts would not match and therefore not be deleted or replaced.

8. Phone Numbers (Extension Phone, Phone, FAX, SMS, TTY):
    a. If the country for the delivery method is in the list of NANP (North American Numbering Plan) countries, then the phone number:
        i. Must be 10 digits.
        ii. Cannot start with 911, 976, 411, 011, 900, 611, 000.
    b. Everbridge runs a validation on all phone numbers, NANP and non-NANP. Everbridge Suite stores phone numbers without a mask or delimiters. If a phone number in the CSV file contains delimiters (for example: nnn-nnn-nnnn or (nnn)nnn-nnnn) then:
        i. International phone numbers must be entered as though they will be dialed from outside of the Organization's or Contact's designated country. Any special handling is included by Everbridge, depending on the call origination site. NOTE: This applies only to the phone number itself, not to the country code.
            (1) For example, when dialing a mobile phone in Mexico, a "1" needs to be entered before the phone number. That "1" must be included for mobile numbers for the system to reach them. Landlines do not need the "1."
        ii. Everbridge Suite displays NANP phone numbers in the user interface using the format xxx-xxx-xxxx; phone numbers for non-NANP countries are displayed without a format.
        iii. The phone number is returned without delimiters when you download the contact record or retrieve the contact record using the API.
        iv. Everbridge Suite removes the delimiters and stores the digits.
9. Everbridge recommends you do not allow contacts in your Member Portal to edit the required fields (see considerations 3a-3d above). For example, if the contact changes a required field, then when you update your contacts (via SFTP, manual upload, or API), a new record would likely be created if one of the required fields is different when uploaded since the update would not see someone with the same fields to update, and would then assume this is a new contact record to add. Then, because of the new record, the system would not update the intended contact and there would be two records that are out of sync (and continue to be out of sync without manual intervention). Likewise, if using a Delete or Replace file, because the system is looking at the four required fields that do not match the update, the contacts would not match and therefore not be deleted or replaced.

Contact Upload Mapping

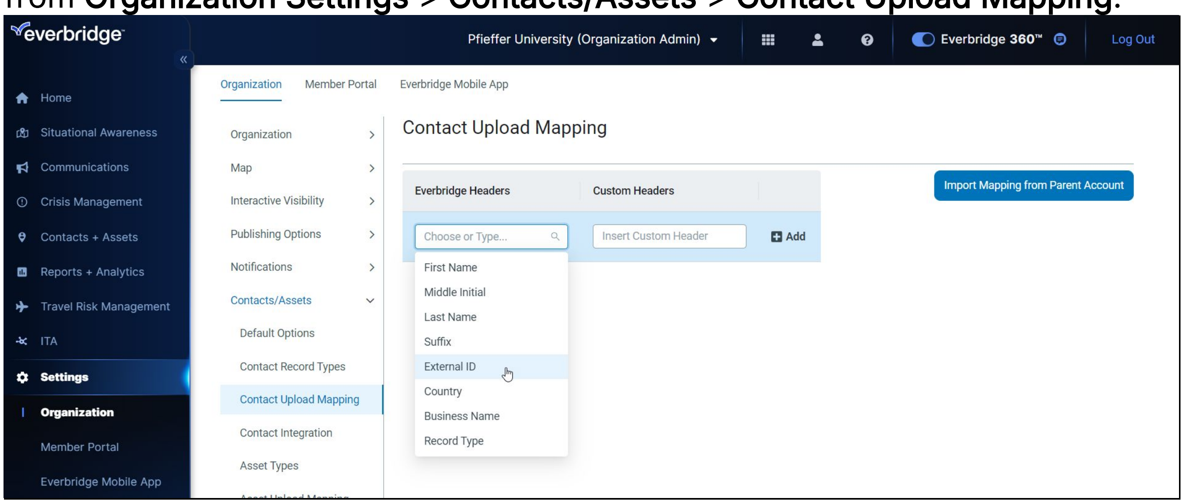
The Contact Upload Data Table provides details about the column headings, from left to right, of the Contact Template (a CSV file). The column headings must not be changed. If you use your own spreadsheet, ensure your column headings have the exact spelling and spaces. Administrators can streamline this process by mapping their own custom headers to standard Everbridge headers in one of two places:

- Account Administrators can do this at the Account level from **Settings** > **Contact Upload Mapping.**



    - If desired, click **Apply Mapping to Organizations** to apply these mappings to the Account's child Organizations.

- Account and Organization Administrators can do this at the Organization level from **Organization Settings** > **Contacts/Assets** > **Contact Upload Mapping**.



  - If needed, click **Import Mapping from Parent Account** to inherit the mappings set at the Account level and apply them to the selected Organization.

For some of the sections of the file, the template provides multiple copies of the data columns, like when the template provides for multiple locations. If your Organization only needs two locations, you can delete the extra Location columns to simplify your data file. You can also remove columns from other areas such as delivery methods and custom fields.

NOTE: Update adds new contacts if the External ID does not already exist. If the External ID already exists, the contact is updated with the new contact attributes. **Replace** overwrites the existing contact list with only those contacts that match the External ID in the CSV data file. It adds new contact records if the External ID is in the CSV file but not in the database.

CAUTION: Using **Replace** deletes contact records if the External ID exists in the database, but not in the CSV file.

If you are updating data for a contact, it is not necessary to use all of the columns. If a column is not in the file, the values for those fields are not updated and remain unchanged.

To remove a value from a contact during an update, include the column in the upload file, but leave the cell empty. For example, to remove a delivery method for a contact, leave the column headers in the CSV file, but delete the device information from the cells.

The last two columns in the Contact Upload Data Table table explain what happens when you make changes to the CSV file. There are four scenarios:

- UPDATE results when changing an existing value to a new value.
- UPDATE results when leaving cells empty that were previously filled in.
- REPLACE results when changing an existing value to a new value.
- REPLACE results when leaving cells empty that were previously filled in.

NOTE: In **Settings > Contacts and Groups > Additional Settings**, if you use the **Date** data type, its format is: **YYYY-MM-DD**. In the respective **Custom Value** field, in the **Format Cells** dialog of Excel, you must modify the **Date** format. Select the values in the cells, then select the **Date** menu to choose **More Number Formats**. Select **Locale (Location): English (U.K.)** and **Type**:

2001-03-14 each time you use the data file, as the CSV file does not save format changes. Otherwise, you will always get the following error: **Additional information/attribute value is invalid**.

Geocoding

When a contact upload includes a latitude and longitude, those coordinates will be retained in the contact record and are visible in the Universe tab. Once the geocoding process has been completed, the coordinates are modified on the contact's record with the geocoded value.

Contact Upload Data Table

Make sure to review the Contact Upload Considerations.

Column Heading	Data Type	Comments	UPDATE Results	REPLACE Results
Organization Name	String	• Required • Only for use at the Account level. In one CSV file, add contacts across different Organizations. **This must be Column A.** • If users try to upload a file with this column from the Organization level, then the application will display an error message in the Upload Result, although it will not stop the upload. The column will be ignored. • Maximum characters: 40.	Field Not Empty: Adds the contact to the Organization if the contact record does not already exist in the Organization. Field Empty: Cannot be empty if upload is performed from the Account. Column Not in File: This is a required field for Account Administrators. The file will not be processed.	Field Not Empty: Moves the contact to the designated Organization if the contact does not already exist in the Organization. Field Empty: Cannot be empty if upload is performed from the Account. Column Not in File: This is a required field for Account Administrators. The file will not be processed.
First Name	String	• Required • Maximum characters: 40.	Field Not Empty: Replaces the existing value Field Empty: This is a required field. The	Field Not Empty: Replaces the existing value Field Empty: This is a required field. The

			record is not processed. Column Not in File: This is a required field. The file will not be processed.	record is not processed. Column Not in File: This is a required field. The file will not be processed.
Middle Initial	String	• Maximum characters: 1.	Field Not Empty: Replaces the existing value. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The Middle Initial is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Last Name	String	• Required • Maximum characters: 40.	Field Not Empty: Replaces the existing value. Field Empty: This is a required field. The record is not processed. Column Not in File: This is a required field. The file will	Field Not Empty: Replaces the existing value. Field Empty: This is a required field. The record is not processed. Column Not in File: This is a required field. The file will

			not be processed.	not be processed.
Suffix	String	• Maximum characters: 10.	Field Not Empty: Replaces the existing value Field Empty: No change to value in database Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value Field Empty: The Suffix is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
External ID	String	• Required • Maximum characters: 50. • Unique identifier for the contact record. • Must be unique in the Organization. • The External ID is case-sensitive. • If the External ID does not exist in the database, then the application adds the record. If the External ID exists, then the application updates the existing record. • If more than one record in your file has the same External ID, then the subsequent records will be used to update the content of the first record loaded.	Field Not Empty: Adds the contact to the Organization or updates the record. Field Empty: This is a required field. The record is not processed. Column Not in File: This is a required field. The file will not be processed.	Field Not Empty: Adds the contact to the Organization if the External ID does not exist in the database; otherwise, updates the contact record using the information in the file. Field Empty: This is a required field. The record is not processed.

				Column Not in File: This is a required field. The file will not be processed.
Country	String	• Numeric Country Code, ISO 2-character alpha country code from ISO-3166-1, or the full country name as it appears in any Country field of Everbridge Suite. Must be the Numeric Country Code, ISO Alpha-2 (such as “US”) or the full name of the country. When full name, use initial capital letters; for example, “United States”. The system does not accept lower case values (“us” or “united states”) or upper case names (“UNITED STATES”). • This is the primary country for the contact.	Field Not Empty: Replaces the existing value. Field Empty: No change to value if value exists in database; set to Organization country if contact is added and field is empty Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The Country is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Record Type	String	• Required • Must exist in the **Organization Settings** page. **NOTE:** Set up your Record Types before uploading contact data.	Field Not Empty: Replaces the existing value. Field Empty: This is a required field. The record is not processed.	Field Not Empty: Replaces the existing value. Field Empty: This is a required field. The record is not processed.

			Column Not in File: This is a required field. The file will not be processed.	Column Not in File: This is a required field. The file will not be processed.

Time Zone	String	Optionally, type a value below:
		`Pacific/Niue`
		`Pacific/Pago_Pago`
		`Pacific/Honolulu`
		`Pacific/Johnston`
		`Pacific/Rarotonga`
		`Pacific/Tahiti`
		`Pacific/Marquesas`
		`America/Anchorage`
		`Pacific/Gambier`
		`America/Los_Angeles`
		`America/Tijuana`
		`America/Vancouver`
		`America/Whitehorse`
		`Pacific/Pitcairn`
		`America/Dawson_Creek`
		`America/Denver`
		`America/Edmonton`
		`America/Hermosillo`
		`America/Mazatlan`
		`America/Phoenix`
		`America/Yellowknife`
		`America/Belize`
		
		`America/Chicago`
		`America/Costa_Rica`
		`America/El_Salvador`
		`America/Guatemala`
		`America/Managua`
		`America/Mexico_City`
		`America/Regina`
		`America/Tegucigalpa`
		`America/Winnipeg`
		`Pacific/Easter`
		`Pacific/Galapagos`
		`America/Bogota`
		`America/Cayman`
		`America/Grand_Turk`
		`America/Guayaquil`
		`America/Havana`
		`America/Iqaluit`
		`America/Jamaica`
		`America/Lima`
		`America/Montreal`
		`America/Nassau`
		`America/New_York`
		`America/Panama`
			Field Not Empty: Replaces the existing value.
			
			Field Empty: No change to value in database.
			
			Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
				Field Not Empty: Replaces the existing value.
				
				Field Empty: No change to value in database.
				
				Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

		America/Port-au-Prince America/Toronto America/Caracas America/Anguilla America/Antigua America/Aruba America/Asuncion America/Barbados America/Boa_Vista America/Campo_Grande America/Cuiaba America/Curacao America/Dominica America/Grenada America/Guadeloupe America/Guyana America/Halifax America/La_Paz America/Manaus America/Martinique America/Montserrat America/Port_of_Spain America/Porto_Velho America/Puerto_Rico America/Rio_Branco America/Santiago America/Santo_Domingo America/St_Kitts America/St_Lucia America/St_Thomas America/St_Vincent America/Thule America/Tortola Antarctica/Palmer Atlantic/Bermuda America/St_Johns America/Araguaina America/Argentina/Buenos_Aires America/Bahia America/Belem America/Cayenne America/Fortaleza America/Nuuk America/Maceio America/Miquelon America/Montevideo America/Paramaribo America/Recife America/Sao_Paulo Antarctica/Rothera Atlantic/Stanley America/Noronha Atlantic/South_Georgia America/Scoresbysund Atlantic/Azores Atlantic/Cape_Verde Africa/Abidjan		

		Africa/Accra Africa/Bamako Africa/Banjul Africa/Bissau Africa/Casablanca Africa/Conakry Africa/Dakar Africa/El_Aaiun Africa/Freetown Africa/Lome Africa/Monrovia Africa/Nouakchott Africa/Ouagadougou Africa/Sao_Tome America/Danmarkshavn Atlantic/Canary Atlantic/Faroe Atlantic/Reykjavik Atlantic/St_Helena Etc/GMT Europe/Dublin Europe/Lisbon Europe/London Africa/Algiers Africa/Bangui Africa/Brazzaville Africa/Ceuta Africa/Douala Africa/Kinshasa Africa/Lagos Africa/Libreville Africa/Luanda Africa/Malabo Africa/Ndjamena Africa/Niamey Africa/Porto-Novo Africa/Tunis Africa/Windhoek Europe/Amsterdam Europe/Andorra Europe/Belgrade Europe/Berlin Europe/Brussels Europe/Budapest Europe/Copenhagen Europe/Gibraltar Europe/Luxembourg Europe/Madrid Europe/Malta Europe/Monaco Europe/Oslo Europe/Paris Europe/Prague Europe/Rome Europe/Stockholm Europe/Tirane			

		Europe/Vaduz Europe/Vienna Europe/Warsaw Europe/Zurich Africa/Blantyre Africa/Bujumbura Africa/Cairo Africa/Gaborone Africa/Harare Africa/Johannesburg Africa/Kigali Africa/Lubumbashi Africa/Lusaka Africa/Maputo Africa/Maseru Africa/Mbabane Africa/Tripoli Asia/Amman Asia/Beirut Asia/Damascus Asia/Gaza Asia/Jerusalem Asia/Nicosia Europe/Athens Europe/Bucharest Europe/Chisinau Europe/Helsinki Europe/Istanbul Europe/Kiev Europe/Riga Europe/Sofia Europe/Tallinn Europe/Vilnius Africa/Addis_Ababa Africa/Asmara Africa/Dar_es_Salaam Africa/Djibouti Africa/Kampala Africa/Khartoum Africa/Mogadishu Africa/Nairobi Antarctica/Syowa Asia/Aden Asia/Baghdad Asia/Bahrain Asia/Kuwait Asia/Qatar Asia/Riyadh Europe/Kaliningrad Europe/Minsk Indian/Antananarivo Indian/Comoro		

		Indian/Mayotte Asia/Tehran Asia/Baku Asia/Dubai Asia/Muscat Asia/Tbilisi Asia/Yerevan Europe/Moscow Europe/Samara Indian/Mahe Indian/Mauritius Indian/Reunion Asia/Kabul Antarctica/Mawson Asia/Aqtau Asia/Aqtobe Asia/Ashgabat Asia/Dushanbe Asia/Karachi Asia/Tashkent Indian/Kerguelen Indian/Maldives Asia/Calcutta Asia/Colombo Asia/Katmandu		
		Antarctica/Vostok Asia/Almaty Asia/Bishkek Asia/Dhaka Asia/Thimphu Asia/Yekaterinburg Indian/Chagos Asia/Rangoon Indian/Cocos Antarctica/Davis Asia/Bangkok Asia/Hovd Asia/Jakarta Asia/Omsk Asia/Phnom_Penh Asia/Saigon Asia/Vientiane Indian/Christmas Antarctica/Casey Asia/Brunei Asia/Choibalsan Asia/Hong_Kong Asia/Krasnoyarsk		
		Asia/Kuala_Lumpur Asia/Macau Asia/Makassar Asia/Manila Asia/Shanghai Asia/Singapore Asia/Taipei Asia/Ulaanbaatar Australia/Perth		

		Asia/Dili Asia/Irkutsk Asia/Jayapura Asia/Pyongyang Asia/Seoul Asia/Tokyo Pacific/Palau Australia/Adelaide Australia/Darwin Antarctica/DumontDUrville Asia/Yakutsk Australia/Brisbane Australia/Hobart Australia/Sydney Pacific/Guam Pacific/Port_Moresby Pacific/Saipan Pacific/Truk Asia/Vladivostok Pacific/Efate Pacific/Guadalcanal Pacific/Kosrae Pacific/Noumea Pacific/Ponape Pacific/Norfolk Asia/Kamchatka Asia/Magadan Pacific/Auckland Pacific/Fiji Pacific/Funafuti Pacific/Kwajalein Pacific/Majuro Pacific/Nauru Pacific/Tarawa Pacific/Wake Pacific/Wallis Pacific/Enderbury Pacific/Tongatapu Pacific/Kiritimati		
Groups	String	• Maximum characters: 260 per group name. • The Groups column cannot be repeated. All groups assigned to the contact must be in this cell. You can have an unlimited number of groups. • Can contain one or more group names. Each group name cannot be	Field Not Empty: Adds the contact to the assigned group(s) and removes the contact from existing group(s). For example, Bob Smith is currently a	Field Not Empty: Adds the contact to the assigned group(s) and removes the contact from existing group(s). For example, Bob Smith is currently a

		longer than 260 characters. Separate group names using the pipe (|) character. For example, for contact Bob Smith, if his Groups cell contains **Floor 2 |Nurse**, then Bob Smith becomes a member of these two groups.	member of the "Floor 2" group. If the CSV cell contains "Nurse", then Bob will be moved to the "Nurse" group. Place an asterisk (*) and a pipe as the first two characters to add a contact to a group without removing the contact from existing groups. For example, contact Sue Jones is already a member of the CodeBlue group. Her Groups cell contains the following: ***| Floor 1|ER Doctor**. Sue Jones is now a member of three groups. <u>Field Empty</u>: Removes the contact from all assigned groups if the contact exists in the	member of the "Floor 2" group. If the CSV cell contains "Nurse", then Bob will be moved to the "Nurse" group. NOTE: The "|" notation is not processed during a REPLACE. <u>Field Empty:</u> Removes the contact from all assigned groups if the contact exists in the database. <u>Column Not in File:</u> This field is not required. The file will be processed and any existing value will be retained.

			database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	
SSO User ID	String	• If you have Single Sign-On functionality enabled for your Organization and want to allow your contacts to log in to the Member Portal by using their SSO credentials, enter the customer-defined SSO User ID.	Field Not Empty: Replaces the existing value. Field Empty: The SSO User ID is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The SSO User ID is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Travel Arranger	String	• Enter the External IDs of the contacts who are Travel Arrangers for this contact. Separate the External IDs using the pipe (|) character.	Field Not Empty: Replaces the existing value. Field Empty: The Travel Arranger is removed. Column Not in File: This field is not required. The file will be processed and any existing	Field Not Empty: Replaces the existing value. Field Empty: The Travel Arranger is removed. Column Not in File: This field is not required. The file will be processed and any existing

			value will be retained.	value will be retained.
Expatriate	Boolean	• Optional	Field Not Empty: Replaces the existing value if it's different than the original value. Field Empty: This field is not required. The file will be processed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value if it's different than the original value. Field Empty: This field is not required. The file will be processed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
VIP	Boolean	• Optional	Field Not Empty: Replaces the existing value if it's different than the original value. Field Empty: This field is not required. The file will be processed. Column Not in File: This field is not required. The file will be processed and	Field Not Empty: Replaces the existing value if it's different than the original value. Field Empty: This field is not required. The file will be processed. Column Not in File: This field is not required. The file will be processed and

			any existing value will be retained.	any existing value will be retained.
Group Remove	String	• When using the **Group Remove** column, make sure you remove the **Groups** column from the CSV file. When updating, existing groups not listed in the Group Remove cell remain unchanged. • To remove a contact from a group, enter the group name. Separate group names using the pipe (|) character. For example, to remove a contact from the "Employees" and "Overtime" groups, submit "Employees|Overtime". • To remove a contact from a group and its subgroups, enter an exclamation point (!) and the group name. Separate group names using the pipe (|) character. For example, to remove a contact from the "Parents" group (and any nested groups, submit **!Parents.** **NOTE:** If a group name begins with an exclamation point (!), such as "**!GroupA**", then you must use two exclamation marks (for example, **!!GroupA**) to remove a contact from	Field Not Empty: Removes the contact from the groups. Field Empty: Contact remains in previously assigned groups if the contact exists in the database Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Removes the contact from the groups. Field Empty: Contact remains in previously assigned groups if the contact exists in the database Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

		the group and nested groups. Otherwise, the application searches for "GroupA" and will not find **!GroupA.**		
Location #	String	• Add up to 5 locations for a contact. • Maximum characters: 40. • Each location must be unique per contact. For example, a contact cannot have two "Home" locations, but they can have a "Home" and a "Vacation Home".	Field Not Empty: Replaces the existing value. Field Empty: No change to value in database if contact exists in the database. To remove a Location from a contact, leave the Location # name in this cell, but leave all the other Location information fields empty. For example, to remove the "Home" address, leave "Home" in Location # and ensure all other address fields empty. NOTE: When updating, use the same Location #	Field Not Empty: Replaces the existing value Field Empty: No change to value in database if contact exists in the database. To remove a Location from a contact, leave the Location # name in this cell, but leave all the other Location information fields empty. For example, to remove the "Home" address, leave "Home" in Location # and ensure all other address fields empty. Column Not in File: This field is not required. The file will be

			name to replace the location information. For example, if "Home" is in Location 1, to update the "Home" address, you must specify "Home" as Location 1 and change the corresponding fields to the new address. If you change the Location # name (for example, from Location 1 to Location 2), the application treats the information as a new address if Location 2 did not previously exist; if Location 2 exists, the Location 2 name is replaced but no changes occur to the address information. Column Not in File: This field is not required. The file will be	processed and any existing value will be retained.

			processed and any existing value will be retained.	
Street Address #	String	• Corresponds to Location #. • Maximum characters: 100.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: The Street Address # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Apt/Suite/ Unit #	String	• Corresponds to Location #. • Maximum characters: 75.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: The Apt/Suite/Unit # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

			value will be retained.	
City #	String	• Corresponds to Location #. • Maximum characters: 40.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: The City # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
State/ Province #	String	• Corresponds to Location #. • If State (for U.S. only)—Must be ISO-alpha 2 character (such as "NY") or the full name of the state. When full name, use initial capital letters; for example, "New York". The system does not accept lower case values ("ny" or "new york") or upper case names ("NEW YORK"). • If Province—Enter the actual Province name/ label as the value. Province cannot be a numeric value • Maximum characters: 40.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: The State/Province # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

Postal Code #	String	• Corresponds to Location #. • Maximum characters: 10. • If Country X is "United States" or "US", then valid formats are: 99999; 99999-9999; 999999999 • If Country X is not "United States" or "US", then the value can be any format.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: The Postal Code # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Country #	String	• Corresponds to Location #. • ISO 2-character alpha country code, or full ISO country name from ISO 3166-1. • Must be ISO 2-character alpha (such as "US") or the full name of the country. When full name, use initial capital letters; for example, "United States". The system does not accept lower case values ("us" or "united states") or upper case names ("UNITED STATES").	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: The Country # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Latitude #	Decimal	• Corresponds to Location #.	Field Not Empty: Replaces the	Field Not Empty: Replaces the

		• Only Decimal Degrees are supported. • Minimum value: -90.0. • Maximum value: 90.0. • If no latitude/longitude is entered, then the system automatically attempts to geocode the address • If you provide the latitude/longitude in the data file, then the system verifies the value is between the minimum and maximum values list above, but does not verify that they are correct coordinates for the address.	existing value for the same Location # name. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	existing value for the same Location # name. Field Empty: The Latitude # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Longitude #	Decimal	• Corresponds to Location #. • Only Decimal Degrees are supported. • Minimum value: -180.0. • Maximum value: 180.0. • If no latitude/longitude is entered, then the system automatically attempts to geocode the address. • If you provide the latitude/longitude in the data file, then the system verifies that they are valid values, but does not verify that they are correct coordinates for the address.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: The Longitude # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Location ID #	String	• Client-defined unique identifier for the location record. • Maximum Length: 50.	Field Not Empty: Replaces the existing value for the	Field Not Empty: Replaces the existing value for the

		• Value must be unique in file. • This field is used to add a Static location for contacts and associate those contacts with an existing building. If you also use the Location ID field in the Assets upload, then the Location ID should match the Location ID field in the Contacts upload.	same Location # name. <u>Field Empty:</u> No change to value in database. <u>Column Not in File:</u> This field is not required. The file will be processed and any existing value will be retained.	same Location # name. <u>Field Empty:</u> The Location ID # is removed. <u>Column Not in File:</u> This field is not required. The file will be processed and any existing value will be retained.
Extension Phone #	String	• Ideal for phone numbers that require an extension or for phone systems that use an automated attendant menu. • Add up to 5 Extension Phone paths for a contact. • See the Considerations section earlier in this document.	<u>Field Not Empty:</u> Replaces the existing value for the same Extension Phone #. <u>Field Empty:</u> No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. <u>Column Not in File:</u> This field is not required. The file will be processed and any existing	<u>Field Not Empty:</u> Replaces the existing value for the same Extension Phone #. <u>Field Empty:</u> The Extension Phone # is removed. <u>Column Not in File:</u> This field is not required. The file will be processed and any existing value will be retained.

			value will be retained.	
Extension #	String	• Corresponds to phone number in Extension Phone #. • Maximum value: 10 digits. • No asterisks or pound/ hash (#) symbol. • Commas are accepted in the upload, as well as the UI fields for Manager and Member Portals to aid in successful call timing for PBX; each comma represents a 0.5-second delay.	Field Not Empty: Replaces the existing value for the same Extension Phone #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Extension Phone #. Field Empty: The Extension # is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Extension Phone Country #	String	• Corresponds to phone number in Extension Phone #. • Numeric Country Code, ISO 2-character alpha country code, or full ISO country name from ISO 3166-1. • Must be the Numeric Country Code, ISO 2-character alpha (such as	Field Not Empty: Replaces the existing value for the same Extension Phone #. Field Empty: No change to the	Field Not Empty: Replaces the existing value for the same Extension Phone #. Field Empty: The Extension

		"US"), or the full name of the country. When full name, use initial capital letters; for example, "United States". The system does not accept lower case values ("us" or "united states") or upper case names ("UNITED STATES").	contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Phone Country # is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Phone #	Decimal	• Add up to 6 phone numbers for a contact. • See Contact Upload Considerations.	Field Not Empty: Replaces the existing value for the same Phone #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be	Field Not Empty: Replaces the existing value for the same Phone #. Field Empty: The Phone # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

			processed and any existing value will be retained.	
Phone Country #	String	• Corresponds to the phone number in Phone #. • Numeric Country Code, ISO 2-character alpha country code, or full ISO country name from ISO 3166-1. • Must be the Numeric Country Code, ISO 2-character alpha (such as "US"), or the full name of the country. When full name, use initial capital letters; for example, "United States". The system does not accept lower case values ("us" or "united states") or upper case names ("UNITED STATES").	Field Not Empty: Replaces the existing value for the same Phone #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Phone #. Field Empty: The Phone Country # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Email Address #	String	• Add up to 5 email addresses for a contact. • Maximum characters: 80. • Organization (username@example.com).	Field Not Empty: Replaces the existing value for the same Email Address #. Field Empty: No change to	Field Not Empty: Replaces the existing value for the same Email Address #. Field Empty: The Email Address # is removed.

			value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Plain Text Email - 1-way	String	• Maximum characters: 80. • Recommended path for sending messages to alphanumeric pagers. • Organization (username@example.com).	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The Plain Text Email - 1-way is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Plain Text - 1-way Pager Service	String	• Use this option to send messages to pagers using the WCTP communication channel.	Field Not Empty: Replaces the existing value.	Field Not Empty: Replaces the existing value.

		• Enter a valid pager company name: **American Messaging - MyAirMail, American Messaging - Skytel, USA Mobility, Critical Alert - North East, Critical Alert - South Central, Indiana Paging, or Voalte**. The pager service name is not case-sensitive, but ensure you type the identical characters (and spaces, if needed). • Contact American Messaging if you do not know the network for your pagers. **NOTE:** The Pager Service must be in the list of valid Pager Service names. Invalid Pager Service names are not loaded even though the contact information for the pager is loaded into the contact record. All other validation rules do not change.	Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Empty: The Plain Text 1 1-way Pager Service is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Plain Text Email - 2-way	String	• Maximum characters: 80.	Field Not Empty: Replaces the existing value. Field Empty: No change to value in database.	Field Not Empty: Replaces the existing value. Field Empty: The Plain Text Email - 2-way is removed.

			Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
SMS #	Number	• Add up to 5 SMS paths for a contact. • For international phone numbers, if a "1" or other digit is required for peer-to-peer messaging prior to the actual phone number, do not include this in the numeric string for SMS.	Field Not Empty: Replaces the existing value for the same SMS #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same SMS #. Field Empty: The SMS # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
SMS # Country	String	• Corresponds to phone number in SMS #. • Numeric Country Code, ISO 2-character alpha country code, or full ISO country name from ISO 3166-1.	Field Not Empty: Replaces the existing value for the same SMS #.	Field Not Empty: Replaces the existing value for the same SMS #.

		• Must be the Numeric Country Code, ISO 2-character alpha (such as "US"), or the full name of the country. When full name, use initial capital letters; for example, "United States". The system does not accept lower case values ("us" or "united states") or upper case names ("UNITED STATES").	Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Empty: The SMS # Country is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
FAX #	Number	• Add up to 3 FAX phone numbers for a contact.	Field Not Empty: Replaces the existing value for the same FAX #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record.	Field Not Empty: Replaces the existing value for the same FAX #. Field Empty: The FAX # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

			<u>Column Not in File:</u> This field is not required. The file will be processed and any existing value will be retained.	
FAX # Country	String	• Corresponds to phone number in FAX #. • Numeric Country Code, ISO 2-character alpha country code, or full ISO country name from ISO 3166-1. • Must be the Numeric Country Code, ISO 2-character alpha (such as “US”), or the full name of the country. When full name, use initial capital letters; for example, “United States”. The system does not accept lower case values (“us” or “united states”) or upper case names (“UNITED STATES”).	<u>Field Not Empty:</u> Replaces the existing value for the same FAX #. <u>Field Empty:</u> No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. <u>Column Not in File:</u> This field is not required. The file will be processed and any existing value will be retained.	<u>Field Not Empty:</u> Replaces the existing value for the same FAX #. <u>Field Empty:</u> The FAX # Country is removed. <u>Column Not in File:</u> This field is not required. The file will be processed and any existing value will be retained.
TTY #	Number	• Add up to 3 TTY phone numbers for a contact. • Available only for TTY devices in United States or Canada.	<u>Field Not Empty:</u> Replaces the existing value for the same TTY #.	<u>Field Not Empty:</u> Replaces the existing value for the same TTY #.

			Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Empty: The TTY # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
TTY Country #	String	• Corresponds to phone number in TTY #. • TTY Country must be "1", "US", "CA", "United States"" or "Canada."	Field Not Empty: Replaces the existing value for the same TTY #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record.	Field Not Empty: Replaces the existing value for the same TTY #. Field Empty: The TTY Country # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

			Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	
Numeric Pager	Number	• Add one phone number per contact.	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The Numeric Pager is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Numeric Pager Country	String	• Corresponds to phone number in Numeric Pager. • Numeric Country Code, ISO 2-character alpha country code, or full ISO country name from ISO 3166-1.	Field Not Empty: Replaces the existing value. Field Empty: No change to the	Field Not Empty: Replaces the existing value. Field Empty: The Numeric Pager

		• Must be the Numeric Country Code, ISO 2-character alpha (such as "US"), or the full name of the country. When full name, use initial capital letters; for example, "United States". The system does not accept lower case values ("us" or "united states") or upper case names ("UNITED STATES").	contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Country is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Numeric Pager Pin	Number	• Corresponds to phone number in Numeric Pager. • Maximum 10 digits.	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and	Field Not Empty: Replaces the existing value. Field Empty: The Numeric Pager Pin is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

			any existing value will be retained.	
Numeric Pager Service	String	• Enter a valid pager company name: **American Messaging - MyAirMail, American Messaging - Skytel, USA Mobility, Critical Alert - North East, or Critical Alert - South Central.** The pager service name is not case-sensitive, but ensure you type the identical characters (and spaces, if needed). • Contact American Messaging if you do not know the network for your pagers. **NOTE:** The Pager Service must be in the list of valid Pager Service names. Invalid Pager Service names are not loaded even though the contact information for the pager is loaded into the contact record. All other validation rules do not change.	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The Numeric Pager Service is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
TAP Pager	Number	• Add one phone number per contact. • Phone number is the terminal number.	Field Not Empty: Replaces the existing value. Field Empty: No change to the	Field Not Empty: Replaces the existing value. Field Empty: The

			contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	TAP Pager is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
TAP Pager Country	String	• Corresponds to phone number in TAP Pager. • Numeric Country Code, ISO 2-character alpha country code, or full ISO country name from ISO 3166-1. • Must be the Numeric Country Code, ISO 2-character alpha (such as "US"), or the full name of the country. When full name, use initial capital letters; for example, "United States". The system does not accept lower case values ("us" or "united states") or upper case names ("UNITED STATES").	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and	Field Not Empty: Replaces the existing value. Field Empty: The TAP Pager Country is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

			any existing value will be retained.	
TAP Pager Pin	Number	• Corresponds to phone number in TAP Pager. • Maximum 10 digits.	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The TAP Pager Pin is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
One Way SMS	Number	• Use for SMS subscribers who cannot reply to messages. • For international phone numbers, if a "1" or other digit is required for peer-to-peer messaging prior to the actual phone number, do not include this in the numeric string for SMS.	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in	Field Not Empty: Replaces the existing value. Field Empty: The One Way SMS is removed Column Not in File: This field is not required. The file will be

			which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	processed and any existing value will be retained.
One Way SMS Country	String	• Corresponds to phone number in One Way SMS. • Numeric Country Code, ISO 2-character alpha country code, or full ISO country name from ISO 3166-1. • Must be the Numeric Country Code, ISO 2-character alpha (such as "US"), or the full name of the country. When full name, use initial capital letters; for example, "United States". The system does not accept lower case values ("us" or "united states") or upper case names ("UNITED STATES").	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The One Way SMS Country is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

Custom Field #	String	• "Custom Field" and "Custom Value" in the data file are the Additional Information fields that are configured in the Organization Settings page. • Enter the name of the field in "Custom Field #" and the value for the field in "Custom Value #". • Maximum characters: 40. • Must exist in the Organization Settings page. • There are nine Custom Field #/Custom Value # columns in the data file. You can add any number of Custom Field #/ Custom Value # pairs, as needed. For example, if you have 12 Additional Information fields, you can add three new Custom Field #/Custom Value # pairs to the data file.	Field Not Empty: If the Field name is changed: A new Additional Information field is added to the contact record containing the same value. No changes occur in the contact record if the Name is not added to the **Additional Information** settings (**Settings > Organization > Contacts and Groups > Additional Information**). Field Empty: If the Custom Field # and corresponding Custom Value # are empty, no changes occur in the contact record. The Custom Value is removed if its related Custom Field is provided.	Field Not Empty: If the field name is changed: A new Additional Information field is added to the contact record containing the same value. No changes occur in the contact record if the Name is not added to the **Additional Information** settings (**Settings > Organization > Contacts and Groups > Additional Information**). Field Empty: If the Custom Field # and corresponding Custom Value # are empty, no changes occur in the contact record. The Custom Value is removed if its related Custom Field is provided.

			Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Custom Value #	String, Date, or Decimal	• Corresponds to Custom Field #. • Enter the name of the field in “Custom Field #” and the value for the field in “Custom Value #”. • If the value is a multiple selection list and this contact has more than one value, enter the values separated by the pipe (|) character. Do not add any spaces around the pipe character. • Maximum characters: 260.	Field Not Empty: Replaces the existing value for the same Custom Field #. Field Empty: If the Custom Field # and corresponding Custom Value # are empty, no changes occur in the contact record. The Custom Value is removed if its related Custom Field is provided. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: If the field name is unchanged, but the value is different, then the existing value is replaced. If the field name is changed, then the new field name and its value are added to the Additional Information section for the contact. Field Empty: If the Custom Field # and corresponding Custom Value # are empty, no changes occur in the contact record. The Custom Value is removed if its related Custom Field is provided.

				Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
END	String	• Although not required, it is a recommended technique to include "END" at the end of every row is a visual aid for the readers of the file. (In a spreadsheet, it is the last column heading.)	N/A	N/A

Upload and Download Guidelines for Non-English Languages

Everbridge uses **UTF-8 no BOM Encoding for Contact CSV files**. You can continue to use Microsoft Excel, Microsoft Windows Notepad, or any other Microsoft (or third-party) product to save your CSV files as long as you are using the Latin character set (English).

UTF-8 no BOM Encoding

Everbridge uses the most widely used file encoding scheme, known as UTF-8, when uploading/importing and downloading/exporting Organization Contact files in CSV format. Using the UTF-8 encoding scheme allows the inclusion of non-Latin (non-English) characters in the files. This allows customers to input data in their records in its actual format such as kanji, Hangul, the Arabic alphabet, or any other script.

Downloading/Exporting

As noted above, the downloaded CSV file of an Organization's Contacts will be UTF-8 encoded. This file format is supported by all modern operating systems including Windows, Linux, Unix, and Mac; users should have no problem opening the downloaded file with any modern application that can read a text or CSV file such as Excel, Notepad, OpenOffice, Notepad++, and so forth.

Uploading/Importing

Because of these product constraints on UTF-8 encoding, customers should not use Excel or Notepad to save a CSV file if it contains non-Latin characters as part of the Contacts' fields such as the name, address, and so forth.

Because of this limitation, any non-Latin characters in the saved file will be lost (that is, opening the file again will show random characters in place of the non-Latin characters). Notepad, which ships with all Windows versions, has an Encoding option in the **Save As** dialog box, and appears to supports UTF-8.

However, this is a slightly different variation of the commonly used UTF-8, known as UTF-8 with BOM. Because of this variation, uploading a CSV file that is encoded using UTF-8 with BOM will not work: the file upload may succeed, however, the non-Latin characters may not be imported correctly.

Instead, customers should use applications that support the commonly used UTF-8 encoding, also known as "UTF-8 with no BOM", to save their CSV files. Some examples of such applications include Notepad++, OpenOffice (currently supported by Apache), and Google Docs.

Microsoft Excel has an option (**Save Dialog** > **Tools Button** > **Web Options Item** > **Encoding Tab**) that allows setting the file encoding when saving files. However, as of Office 2010, this option has no effect when saving the file as a CSV.

Glossary of Terms

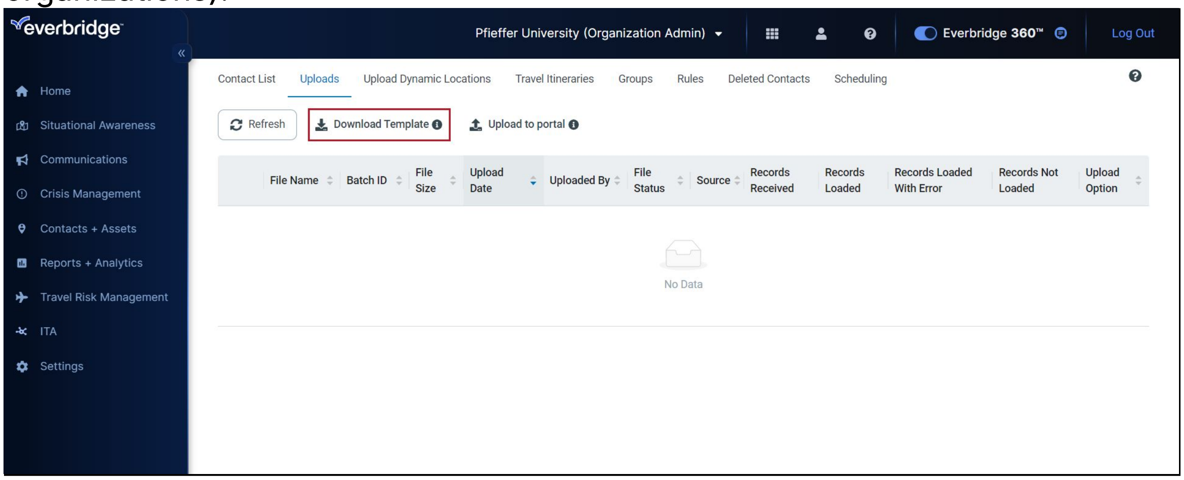
- **ASCII** (American Standard Code for Information Interchange) is a code for representing English characters as numbers, with each letter assigned a number from 0-127.
- **Unicode** is an international encoding standard for use with different languages and scripts, where each letter, digit, or symbol is assigned a unique number ("code points") for every character. This includes characters from nearly all languages, plus many other characters such as mathematical symbols. There are many ways to encode Unicode strings as bytes, such as UTF-8 and UTF-16.
- **UTF-8** (8-bit Unicode Transformation Format) and UTF-16 (16-bit Unicode Transformation Format) are variable-length character encoding for Unicode. UTF-8 uses 1-4 bytes for each value (so, for the first 128 characters, UTF-8 is identical to ASCII) and UTF-16 uses 2 or 4 bytes. UTF-8 was designed for backward compatibility with ASCII and to avoid the complications of endianness (how bytes are ordered within computer memory) and byte order marks (BOMs) in UTF-16 and UTF-32. Again, for every character that has an ASCII value, the Unicode code point and the ASCII value of that character are the same. You should prefer to use Unicode strings rather than ASCII, to allow you to have accented characters and to localize your interface to languages other than English.
- A **Non-ASCII character** is a character that does not match any of the 128 code points in the ASCII character set. Non-ASCII characters include 8-bit characters and multibyte characters.
- A **Multibyte character** is a character that might require from 2-4 bytes of storage. If a language contains more than 256 characters, the code set must contain multibyte characters. With a multibyte code set, an application cannot assume that one character requires only 1-byte of storage.
- **BOM** indicates that the byte order is determined by a byte order mark, if present at the beginning of the data stream (packets of data). For UTF-8, the byte order is not applicable. In general, "UTF-8 no BOM" is the common and expected behavior of a UTF-8 file. Most non-Windows applications refer to this format as "UTF-8" and save the file without a BOM. Microsoft, however,

appends a BOM when saving with UTF-8 encoding, so other Windows applications (like Excel) add BOMs to UTF-8 files by default.

Create the CSV file for Upload

To prepare your CSV data file:

1. Click the **Contacts** tab. Click the **Uploads** subtab if it is present.
2. Click **Download Template**. Depending on your browser, the following message might appear: "What do you want to do with CSVTemplate.csv" (or "account_contactCSV" for Account Administrators to add contacts across organizations).



3. Save the file to your desktop, then open it. The CSV template contains the correct column heading names (as described in Contact Upload Mapping).
4. Review the following for a full understanding of the columns in the CSV template:
   a. Contact Upload Mapping
   b. Contact Upload Considerations
   c. Contact Upload Data Table
5. Also review the following about the data file:
   a. Make sure that the column heading names are exactly as they appear in the template to avoid errors when you upload the file.

      NOTE: Only Account Administrators can use the Contacts tab at the Account level to upload data across organizations. In Column A (so that all other columns shift to the right), add the column heading, Organization Name. This way, the contacts can be placed in their specific organization.

   b. For some of the sections of the file, the template provides multiple copies of the data columns. For example, the template provides for multiple locations. You can safely delete the extra Location fields to simplify your data file. You can also delete columns from other areas such as Delivery Methods and Custom Fields.

c. If you are updating some of the data for a contact, it is unnecessary to use all of the columns. If a column is not in the file, the values for those fields are not updated. For example, if a contact has completed hazardous materials training, you only need to update his certifications. It is not necessary to include all of the other contact information — those values remain unchanged.
d. To remove a value from a contact during an update, include the column in the upload file, but leave the value cell empty. For example, to remove a delivery method for the contact, leave the column headers in the file but remove the device address information.
e. To remove a contact's location by updating, enter the name of the location to remove in the Location Name column, but leave the other cells describing the location empty.
f. It is a recommended technique to end each row in the file with "END" to clearly mark the end of the contact record.
g. The required commas are automatically added for you.

6. Review the following regarding the Upload directories and expected behavior:
   a. **Update** - The Update option adds new contact records if the External ID is in the CSV file but not in the database. It updates existing contact records if the External ID exists in the database. This option does not delete any contact records. Therefore, Everbridge recommends you always run combined uploads (Update and Delete) one after the other. If you only run an Update (and forget running the Delete), you could have many new people along with updates to existing employees, but also people who are no longer with the organization. This could become a breach of using personal information if the former employee is still sending data after they should have been deleted.

NOTE: For each data element, make sure to also review the Comments in the Contact Upload Summary.

Data Element Category	Comments
Personal Information	• The External ID is the unique identifier for a contact. When you are updating a file, if the External ID does not exist in the database, it adds a record; if the External ID already exists in the database, it updates that record. • If two records in your file have the same External ID, the record is updated using the data from the later

	record. For example, if External ID EB-0004 exists for Larry Hansen in row 4 and Larry Hansen in row 7, the data from row 7 is used.
Groups	You can add contacts to groups by uploading the group name with the contact. If the contact lists a group that does not exist, the group is added and the contact is added to it. The Groups column can only hold a simple list of group names. That is, you cannot specify the nested structure of groups. To manage the group structure, use the web interface. You cannot delete a group name using a CSV file. To manage the group structure, use the web interface. The Groups column can contain one or more group names. Each group name cannot be longer than 260 characters. Separate group names using the pipe (|) character. Do not add any spaces before and after the pipe character. For example, for contact Sharon Bennett, her Groups cell contains the following: Employees|Parents. Sharon Bennett becomes a member of these two groups. When performing an update, add a contact to a group, but never remove them from existing groups when an asterisk (*) is placed in front of the first pipe. For example, contact Brad Currier is already part of the Hart School District group. His Groups cell contains the following: *|Newhall School District|Saugus School District. Brad Currier is now a member of three groups. The contact is removed from any groups you do not list or if you do not use the asterisk and pipe character as the first characters in the Groups column. To remove a contact from a group, first create a Group Remove column anywhere in the CSV file if you are not using the latest template. (In the latest template, the Group Remove column is next to the Groups column.) To remove a contact from a group, type the group name in the Group Remove column. Also enter the group names in the Groups column that you want to keep. For example, you would do this to remove Brad Currier from the Saugus School District but keep him as a contact in the Newhall School District and Employees groups.

	When using the Group Remove column, you can remove the Groups column from the CSV file to keep the groups not listed in the Group Remove column. To remove a contact from a group and all its nested groups, in the Group Remove column, enter an exclamation point, the group name, and the pipe character to separate one group from another. For example, to remove Sharon Bennett from the “Employees” group and any nested groups under “Employees”, as well as the “Managers” group and any nested groups under “Managers”, type the following: !Employees|!Managers. To remove a contact from only the parent group and not its nested groups, in the Groups column, type the subgroup names, each separated by the pipe character. Do not add any spaces before and after the pipe character. Then, in the Group Remove column, type the name of the parent group. For example, to keep the Craig Barrick in the nested Parents subgroup, but remove him from the Employees parent group, type Parents in the Groups column and Employees in the Group Remove column.
Locations	• A contact can have up to five locations, but the location names must be unique for the contact. For example, a contact cannot have two “Home” locations, but can have a “Home” and a “Vacation Home”. • If a contact has an address for a location, but no latitude and longitude, it is automatically geocoded for you. This makes the contact available to you on the map. • If you provide latitude and longitude in the data file, the system verifies that they are valid latitude and longitude values. However, it does not verify that these are the correct coordinates for the address. Therefore, if you supply the coordinates, ensure that they are correct. Everbridge supports Decimal Degrees (DD) instead of Degrees/Minutes/Seconds (DMS) when inserting latitude/longitude values for Contact and Building/Asset records. • To update an address for the location name “Home”, for example, simply change the address information for “Home” in the CSV file and upload the CSV file again.

	• To replace a Location Name (for example, the value in "Location 1"), modify the CSV file in the following manner: ▪ Overwrite the original location name with the replacement location name. For example, in the Location 1 column, replace "Work" with "NewWork" and add the Suite number and ZIP code. ▪ In a different location (for example, in Location 2), type the original Location 1 value, but leave all of its address fields empty. For example, in Location 2, type the value "Work". Using this example, after you update with your modified CSV file, the Location Name "NewWork" has replaced "Work" in Location 1 and, in Location 2, the Location Name "Work" and its Country value are filled in, although the address fields for "Work" are empty.
Delivery Methods	• The individual delivery methods in the data file are Delivery Method fields that are predefined for your organization. Enter the name of the value under the corresponding Delivery Method in the CSV file. • If you enter a value for a Delivery Method not defined for your organization, nothing occurs during the upload process. Unlike Groups and Custom Fields, you cannot enter multiple values in a single Delivery Method. Only the first value is used.
Custom Fields	• Custom Fields in the data file are Additional Information fields that are predefined for your organization. Enter the name of the field in "Custom Field" and the value of the field in "Custom Value." • If you do not enter a Custom Field/Custom Value, the Contact Record provides a drop-down list of Additional Information, from which you can manually select one or more from the predefined information fields. • If the field is a multiple selection list and this contact has more than one value, enter the values in a string separated by the pipe (|) character. Do not add any spaces before and after the pipe character. For example, to list "Fire Warden and CPR-First Aid", in the Custom Value field, type the following: "Fire Warden|CRP-First Aid".

	• The CSV file includes nine pairs of Custom Field/ Custom Value fields. If you need more, add them to your CSV file. You can have an unlimited number of Custom Field/Custom Value pairs.

- **Replace** - For the most part (depending on the data element category), the Replace option replaces all contact records for your organization with the records in the CSV file that match the Record Type and External ID in the database. It adds new contact records if the External ID is in the CSV file but not in the database.

  CAUTION: Using the Replace option deletes contact records if the External ID exists in the database, but not in the CSV file.

- **Restore** (obtain CSV file from Deleted Contacts page)—Select this option to restore previously deleted contact records that are listed on the Deleted Contacts page. Restore overwrites existing contact records that have the same External ID. (Refer to Deleting or Restoring Contacts for details about restoring Deleted Contacts via a CSV file.)
- **Delete** - The Delete option deletes the contact records from the Organization that match the External IDs in the CSV file. Everbridge recommends you always run combined uploads (Update and Delete) one after the other. If you only run an Update (and forget running the Delete), you could have many new people along with updates to existing employees, but also people who are no longer with the Organization. This could become a breach of using personal information if the former employee is still sending data after they should have been deleted.

9. Fill in the template with your Organization’s contacts and their corresponding fields.
10. From the CSV template, save the file with a new name (that is, use your software's Save-As function).

Choose File Upload Process

Everbridge Suite supports uploading data to the system using the web-based interface (manually) or through Secure FTP (FTP with SSL connectivity via a CSV, Comma-Separated Value, file). In either case, you need to prepare a CSV file. (For information about uploading contacts through Secure FTP, see also Uploading a Contact Data File Via Secure FTP.)

Benefits of uploading include:

- Fast record upload processing.
- Bulk record geocoding based on address information (global geocoding capability).
- Upload error reporting within the upload section ("loaded without errors", "loaded with errors", "not loaded - critical").
- File upload status emails:
  - Received Contact Data File email (automatically sent to the Administrator’s email account).
  - Processed Contact Data File email (automatically sent to the Administrator’s email account).

In many Organizations, the file is generated by the HR (Human Resources) system or other system of record. You then upload the file to Everbridge Suite after reviewing and editing the file. You can also add a file directly. The data file you upload contains all the personal and contact information you would enter on-screen for an individual contact: **General Information**, **Address Information**, **Delivery Methods**, and **Additional Information**.

Regardless of whether the file is uploaded automatically or manually, its fields must use the correct format for the data. You can download the template directly from the **Contacts** tab.

The file you upload must be a CSV (Comma-Separated Value) file. In a CSV file, the data fields are separated by commas. The first row of the file contains the names of the data fields. You must make sure that there are no extra characters in any line or lines in the file.

```
First Name,Middle Initial,Last Name,Suffix,External ID,Country,Business Name,
Joe,C,Oliver,,EB-0002,United States,,Employee,Work,2 Journal Square Plaza,,
Juan,,Gonzales,,EB-0003,United States,,Employee,Work,2 Journal Square Plaza,
Mary,M,Briggs,,EB-0006,United States,,Employee,Work,14 Wall St,,New York
Nancy,,Cook,,EB-0007,United States,,Employee,Work,14 Wall St,,New York,N
```

NOTE: If you need to add commas to a phone extension, enclose the Extension Phone field with quotes. For example, ",,,9732" is one field with the value ,,,9732. Without quotes, it is four fields where the first three fields are empty and the fourth field is 9732.

If you have spreadsheet software, like Microsoft Excel, on your system, it opens a CSV file automatically. The spreadsheet makes it convenient to see and edit the data, and you do not need to worry about placing the commas.

NOTE: No matter what software you use, make sure that it preserves the CSV file format and does not add any characters to the file. If you use spreadsheet software, make sure you save your data as a CSV file without formatting and not as a spreadsheet-formatted file like an Excel XLSX file. Spreadsheet files will not upload.

TIP: If you can't preserve the leading zero in the Postal Code column when exporting the data from your system of record, then use the Microsoft Excel cell formatting feature found in "Format Cells > Special > ZIP Code".

(If your implementation uses non-English languages, see also Upload and Download Guidelines for Non-English Languages.)

Upload a Contact Data File via Secure FTP

By configuring your computer and **Secure FTP** (File Transfer Protocol) software to work together, you can submit the CSV file containing your contact 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.

> **NOTE:** If encryption is turned on in the Secure FTP settings and you want to upload a file that is not encrypted, then you need to turn off encryption in the settings, then upload the file, and turn encryption back on.

To submit a Contact data file via Secure FTP:

1. First, make a backup of your current Contact data file. (See the procedure Backing Up Your Existing Contact Data File.)
2. From the **Settings** tab, select **Contacts/Assets > Upload Options** at the Organization level or **Security > Secure FTP** at the Account level. See Upload Options to configure your system to add a contact upload file in the Everbridge format. You then script or schedule software that supports Secure File Transfer Protocol (FTP) to upload your file to Everbridge.
3. With your IT department, use Secure FTP to upload CSV data files and use File Encryption for additional security.

   > **NOTE:** Unlike Contact data, Asset data does not support File Encryption.

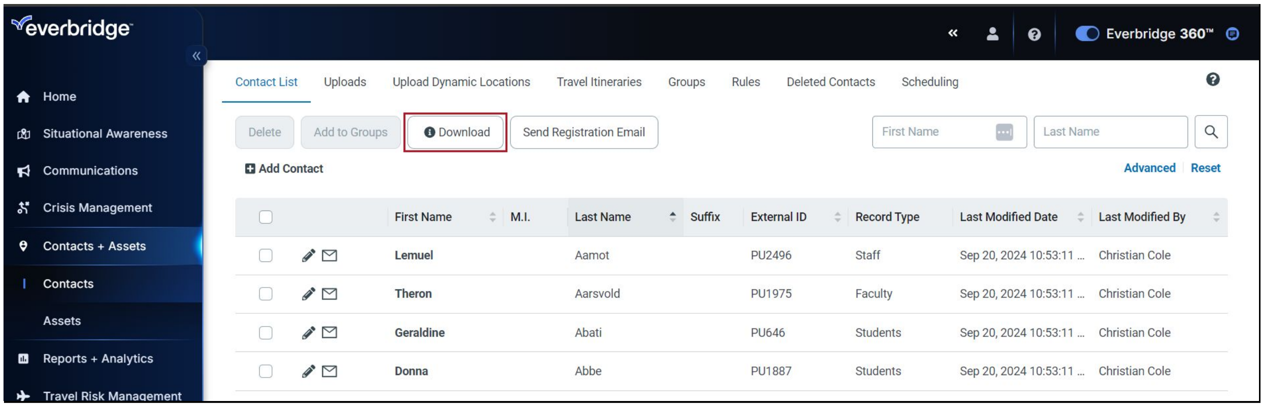
4. Download the Access Instructions to prepare and test your connection to the Everbridge Secure FTP Server as well as to encrypt your Contact data at the file level using PGP or GPG in addition to the standard encryption in transit (SSL or TLS) provided by Everbridge.
5. > **NOTE:** The Access Instructions 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.

6. Prepare your Contact data file. (See Choose File Upload Process.)
7. Ask your IT department to configure your computer system and Secure FTP software. The Secure FTP software is scripted to perform the transfer. (For a description of the FTP directories, see step 5 of the procedure, Upload a Contact Data File via the Manager Portal.)
8. On the server, use the following folders as destinations for your contact data file:
   a. **Update** - Equivalent of the UPDATE option in the Upload page.
   b. **Delete** - Equivalent of the DELETE option in the Uploads page.
   c. **Replace** - Equivalent of the REPLACE option in the Uploads page.
   d. **Result** - The results of any upload request
   e. **User** - The client can load a CSV file containing user records to add.
   f. **Gis** - The client can load a point-address file.
9. For more information, see Step 5 of the procedure Upload a Contact Data File via the Manager Portal.
10. When the Contact data file is transferred, from the Contacts tab, perform Steps 5-7 of the procedure Upload a Contact Data File via the Manager Portal.

> **NOTE:** When sending a file using encryption via Secure FTP, the Results file is not encrypted. For more information about encryption, read the Upload Options section of this guide.

Download Contact Records

You can download your Contact Records in a Comma-Separated Values (CSV) file from the Contact List. Use the CSV file as a starting point for making changes or restoring the contact data.



To download Contact Records:

1. Navigate to **Contacts+Assets** > **Contacts** > **Contact List**.
2. Depending on how many Contact Records need to be downloaded, either:
   - To download a CSV file containing all contacts, ensure all checkboxes are clear for all records, then click **Download**. Save the file to your local computer resource
   - To download a CSV file containing only some of the contacts, select the checkbox in the row next to each desired contact and click **Download**.
     - Everbridge Suite screens the data before downloading it to your local system. If there is any suspicious content (for example, strings that start with = + - @ “ and when - or + are followed by a number) in any text field, then the CSV-formatted file will be downloaded using a TXT file type during the download.
3. Click **Download**. Save the file to your desktop.

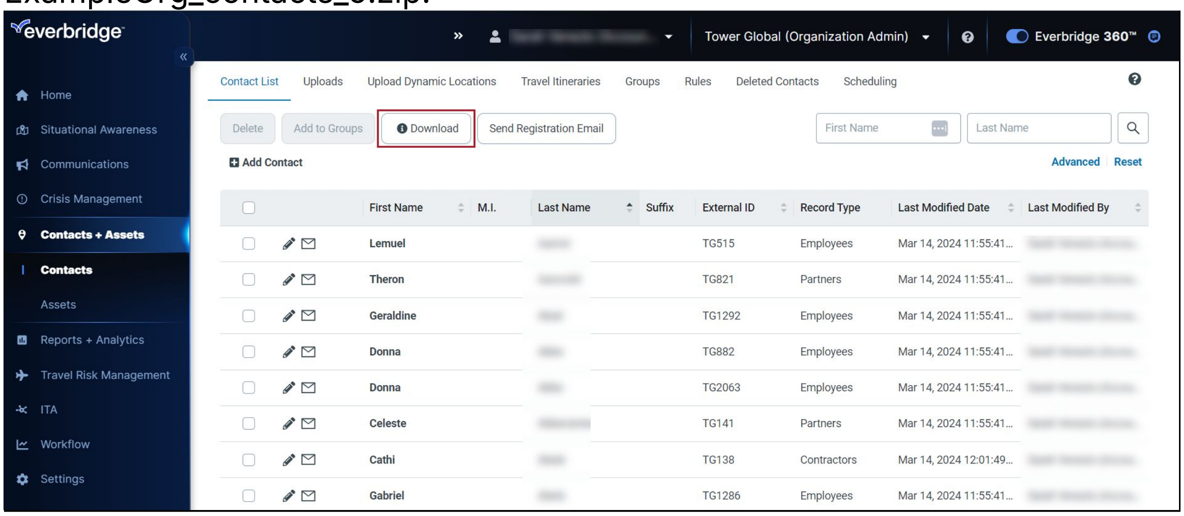
NOTE: The selections must be from a single page, so you might first need to adjust the number of contacts per page. Use Page Controls to adjust the number of contacts per page.

Backing Up Your Existing Contact Data File

Before uploading a Contact data file using either the web-based interface or via SFTP, Everbridge recommends you make a backup of your current file. Additionally, Everbridge also recommends you back up your Contact data every month as well. Having a backup file of your Contacts helps ensure that if you ever need to restore that data, you will be able to with minimal effort.

Follow the steps below to download a .CSV file containing the current Contact data in your Organization:

1. Navigate to the **Contacts** > **Contact List**.
2. Select **Download**. A .CSV file is downloaded to your desktop. Its filename is your OrganizationName_contacts_and a number.zip. For example: ExampleOrg_contacts_5.zip.



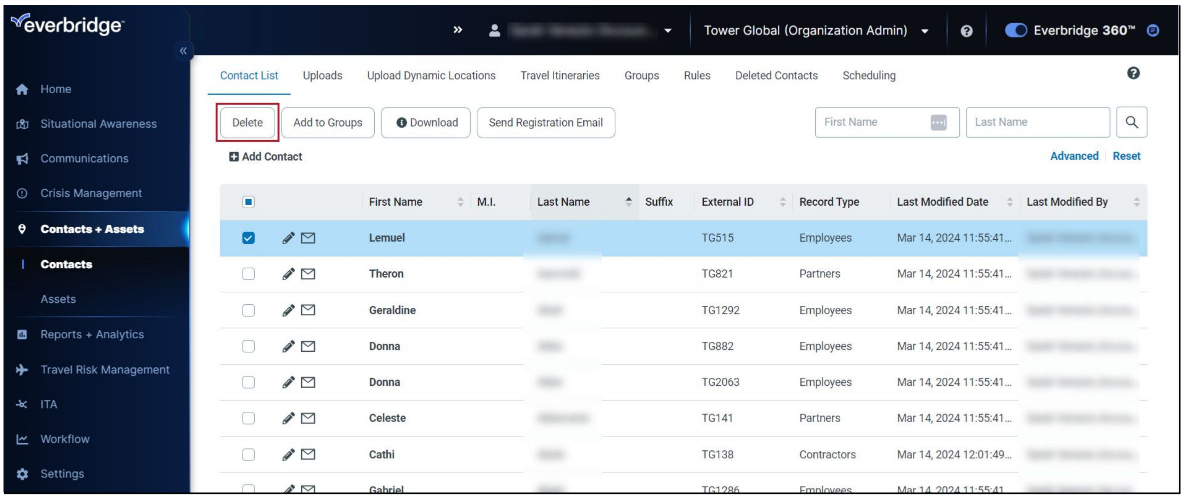
> **NOTE:** If the .CSV file contains a large amount of data, it may take a while to download. You can keep working, however. This process runs in the background and Everbridge emails you when it is done.

3. Use this .CSV file in case you need to revert to this data. (See [Upload a Contact Data File via the Manager Portal](#).)

Deleting or Restoring Contacts

To manually remove an individual contact:

1. From the **Contact List**, select the checkbox of the contacts you want to delete.
2. Click **Delete**.



3. Click **Yes** to confirm the deletion.

You have 30 days from the deletion date to restore this contact. On the 31st day, the records are permanently purged from the database.

Deleted Contacts

Administrators can restore contacts that were either inadvertently or intentionally deleted from the active database for an Organization. Only Administrator roles who have permission to edit contacts will have access to the Deleted Contacts page or to the upload option "Restore Deleted Contacts".

You have 30 days from the day you delete contacts (manually or via a CSV file) to restore those contacts. On the thirty-first day, the records are permanently purged from the database.

The **Deleted Contacts** tab shows the contacts who have been deleted.

NOTES:

1. Contacts on this page are permanently deleted after 30 days and cannot be restored to "active" status.
2. The date in the Last Updated Date column reflects new values when any change is applied to a contact record.

3. Last Updated By displays the full name of the authorized user in your Account who made changes directly (for example, change a value in a delivery method) or indirectly (for example, removing the contact from a group or deleting the group that contained the contact) to the contact record. In either case, the application updates the "Last updated by" field to show the name of the user who performed an action that affected the contact record.
4. A contact record cannot be edited from this page.
5. The system regenerates the contact layer on the map after a user restores one or more records.

It is possible that multiple records with the same **External ID** can be found in Deleted Contacts. You can either select the specific record to restore or to download in a CSV file.

- **Restoring Deleted Contacts manually** - You can restore up to 200 contacts manually at one time. If you select multiple records with the same External ID and select the Restore option, Everbridge Suite restores the deleted contact record with the most recent **Last Updated Date** and ignores all other instances of the same External ID. The Restore process overwrites existing contact records with the same External ID.
- **Restoring Deleted Contacts via CSV file** - The CSV download file provides all records selected, even if more than one record contains the same External ID. To download all the deleted contact records, do not select any individual contact records and click **DOWNLOAD**.

NOTE: This “restore” feature is not available in the REST API /upload option or in the SFTP folders.

To manually restore deleted contacts:

1. From the **Deleted Contacts** subtab, select the checkboxes of the contacts you want to restore to the active database.
2. Click **Restore**. A Confirm dialog is displayed. The restore process overwrites contact records with the same External ID.
3. Click **Yes**. The selected contacts are restored to the Contacts list.
4. Click **OK**.
5. From the **Contacts** subtab, you see that the selected contacts have been restored.

Restore Deleted Contacts via CSV file

If you want to to restore deleted contacts via CSV file and have more than 200 Deleted Contacts, or want to use a CSV file rather than manually restoring Deleted Contacts, perform the following procedure:

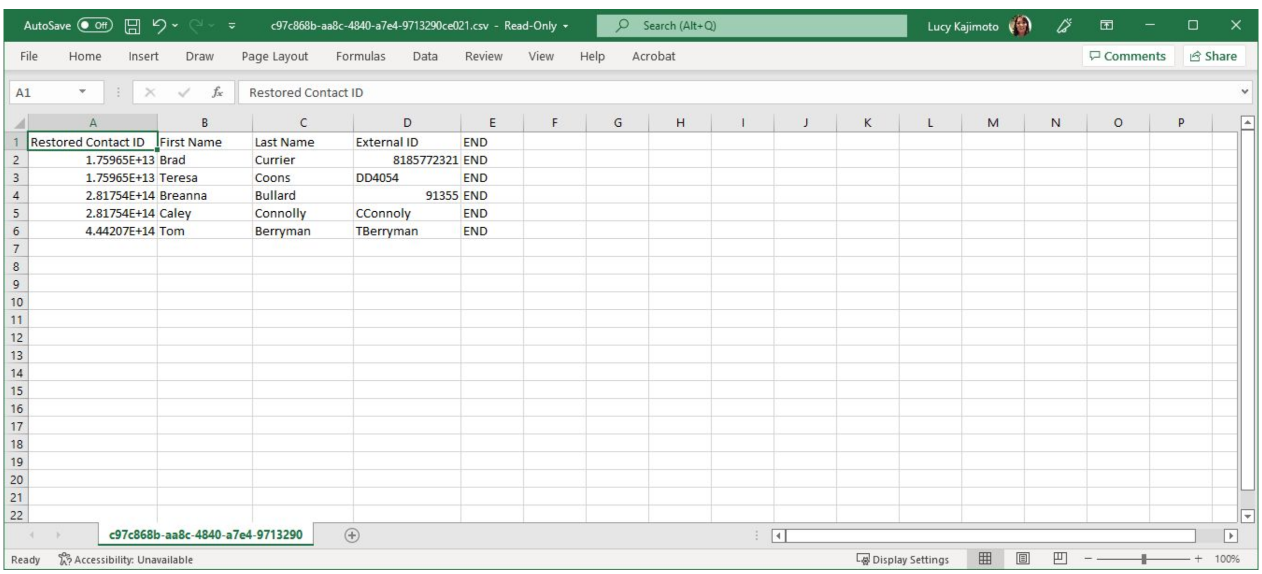
1. From the **Deleted Contacts** subtab, either select the checkboxes of the desired Deleted Contacts from the list or leave clear the checkboxes to retrieve all of the deleted contacts.
2. Click **Download**.
3. Follow the steps in Uploading a Contact Data File.

> **NOTE:** You must use the downloaded CSV file from the **Deleted Contacts** subtab in order to restore the deleted contacts.

A CSV file is generated. The CSV file downloaded from the Deleted Contacts page contains only four columns. The **Restored Contact ID** column contains an internal identifier for the contact record that is required in order for the restoration process to be successful via the Uploads page.

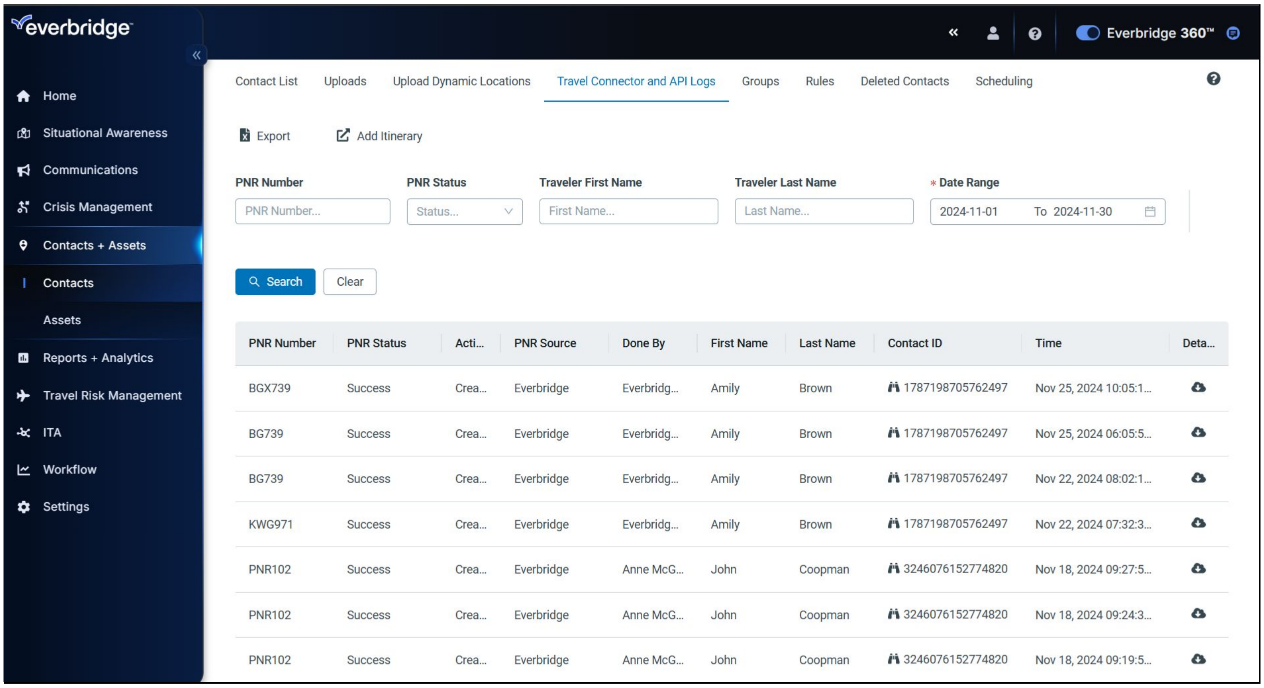
> **NOTE:** Do not open the downloaded file in Excel, because doing so causes modification to the long numeric ID string, which when uploaded, cannot be read and the restore fails.

The restore feature cannot be used to update or replace data; this feature exclusively changes the underlying status of the record from “deleted” to “active”.



Travel Connector and API Logs

Any Travel Itinerary created in Everbridge using either the Travel Data Feeds, Itineraries REST API, or imported manually is recorded under **Contacts+Assets** > **Contacts** > **Travel Connector and API Logs**.



The Audit Log records the following information:

- **PNR Number** - The unique Passenger Name Record number for the itinerary
- **PNR Status** - The status of the creation of the PNR in Everbridge
  - **Success** - The itinerary has been loaded successfully with all traveler's information
  - **Partial Success** - The itinerary has been loaded. Some travelers were rejected, and others were created or matched to existing Everbridge contacts
  - **Failure** - The itinerary was rejected. When a PNR is rejected, a binocular icon is displayed next to the status. Selecting it will display the reason for failure.
- **Action** - Whether the PNR was created, updated, or deleted.
- **PNR Source** - The third-party system where the data originated.
- **Done by** - Name of the user who created the PNR. It could be the Anvil integration user or the API user.
- **First Name** - Traveler's first name.
- **Last Name** - Traveler's last name.

- **Contact ID** - ID of the Everbridge contact created or matched for the traveler. When selecting the binocular icon, it will display either how the contact was matched to an existing Everbridge contact or the reason for failing to match or create a new contact.
- **Time** - Time when the action occurred.
- **Details** - Downloads the PNR details as it was received in the Manager Portal at the time listed. Details are provided in JSON format. The details include the itinerary, all segments, and all travelers received for the PNR number at the time of the transaction.

Searching for a PNR

When accessing the audit log, no records are displayed by default. You can specify the PNR Number, Status, Traveler's First and Last Name, and a date range of up to six months. You can clear the search criteria at any time; previous results will still be displayed in the UI.

Search criteria are case-insensitive and will return all partial matches for the combination of specified criteria. Results are displayed in the table and include one line per traveler in case there are multiple travelers on the same itinerary.

Exporting search results

You can export the search results by selecting the export action. All information that is displayed is exported including the failure reasons and travelers to contact matching details.

Manual Import

You can import itineraries manually from a spreadsheet using a desktop utility. Once you have prepared your itinerary's data in a spreadsheet, you will need to download the utility, launch it locally, and then import the data from the spreadsheet.

> **IMPORTANT:** The Manual Import feature requires that you have **Everbridge Travel Protector** enabled. For more information, contact your Everbridge Account Manager.

The following information can be loaded using the import utility:

- Itinerary
- Traveler

- Flight
- Car
- Hotel
- Train

Segment	Field	Required?	Description
Itinerary	ID	Optional	Internal ID for the PNR (external itinerary ID)
	PNR	Required	PNR or Record location number
	Status	Required	Status of the PNR in the source system. New, canceled (itinerary will be deleted), Update, Active
	Created Time	Optional	Date and time the itinerary was created in the source system
	Note	Optional	Additional notes
Traveler information	Contact ID	Optional	Existing Everbridge contact ID
	Employee ID	Optional	Will be matched to existing Contact External ID. If not filed, a temporary external ID of format **tmpid-<first name>-<last name>** will be assigned to the contact upon creation.
	First Name	Required	Contact first name
	Middle Name	Optional	Contact middle name
	Last Name	Required	Contact last name
	Email Address	Required	Contact Email address
	Phone Number	Optional	Contact phone number
	Note	Optional	Additional notes
Flight	Airline	Required	Name of the airline
	Airline Code	Required	IATA Airline code
	Flight #	Required	Flight number
	Departure Airport Code	Required	IATA Airport code

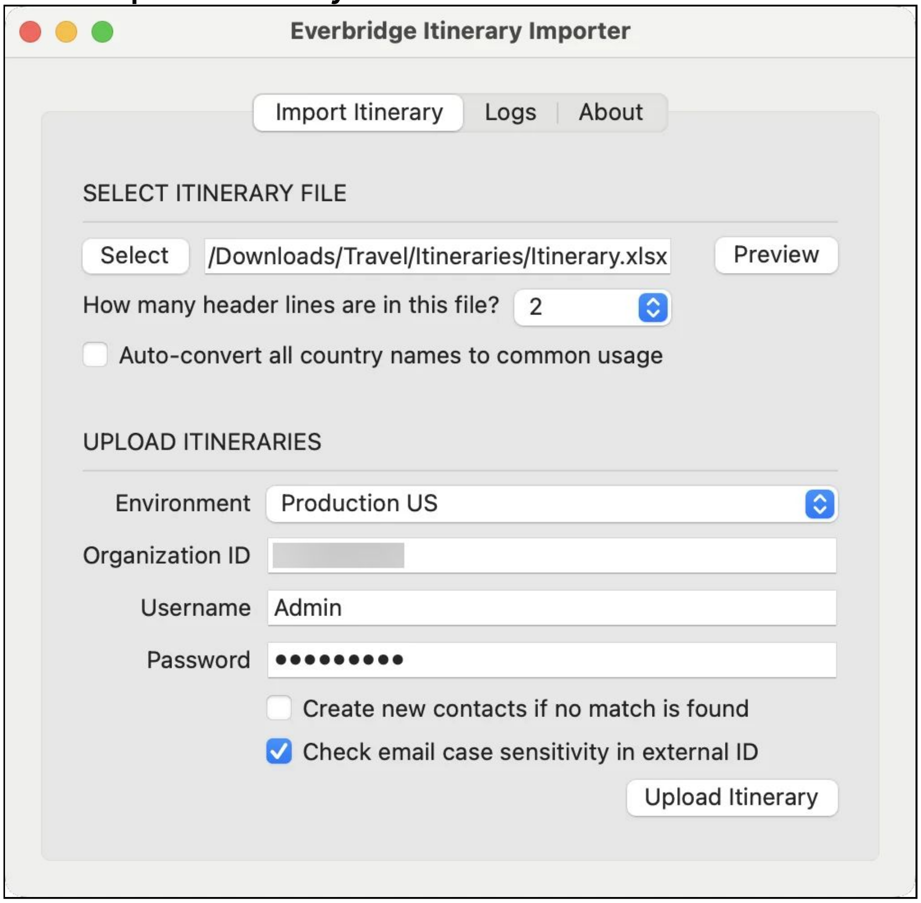
	Departure Time	Required	Departure date and time in local time
	Arrival Airport Code	Required	IATA Airport code
	Arrival Date	Required	Arrival date and time in local time
	Note	Optional	Additional notes
Hotel	Hotel Name	Required	Name of the hotel
	Address	Required	Address of the hotel
	City	Required	City where the hotel is located
	State	Optional	State where the hotel is located. This is a required field for US and Canada
	Country	Required	Country where the hotel is located
	Postal Code	Optional	Postal code of the hotel address
	Time Zone	Required	Time zone where the hotel is located
	Check-in Time	Required	Date and time (in local time) when the traveler will check in
	Check-out Date	Required	Date and time (in local time) when the traveler will check out
	Note	Optional	Additional notes
Car	Rental Agency	Required	Name of the rental car agency
	Pickup location (Airport Code)	Required	IATA code of the pick-up location. If no IATA code exists, specify the nearest IATA code.
	Pick up time	Required	Date and time (in local time) when the car will be picked up
	Drop off location (Airport Code)	Required	IATA code of the pick-up location. If no IATA code exists, specify the nearest IATA code.
	Drop off time	Required	Date and time (in local time) when the car will be returned
	Note	Optional	Additional notes

Train	Train Provider	Required	Name of the train provider
	Train Code	Required	Code identifying the train
	Train Number	Required	Train number
	Departure Airport or Station Code	Required	IATA Train station code, if no IATA code exists, specify the nearest IATA code.
	Departure Time	Required	Date and time (local time) of departure
	Arrival Airport or Station Code	Required	IATA Train station code, if no IATA code exists, specify the nearest IATA code.
	Arrival Time	Required	Date and time (local time) of arrival
	Note	Optional	Additional notes

To import an itinerary:

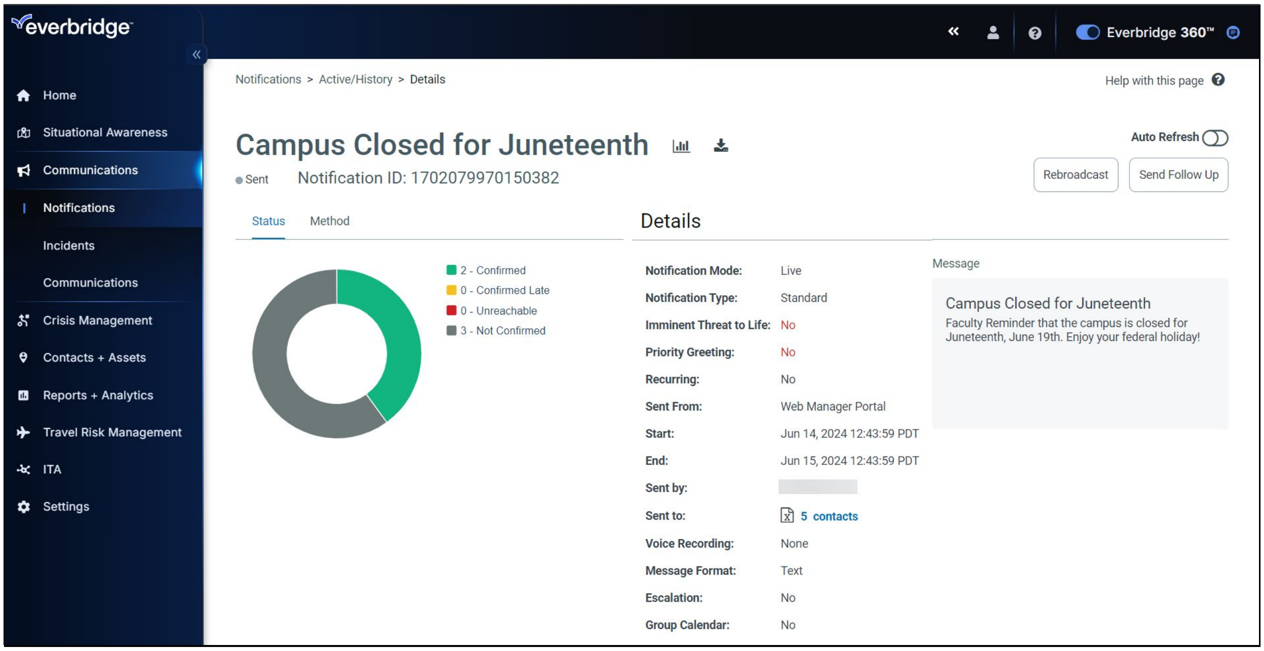
1. Navigate to **Contacts** > **Travel Itineraries.**
2. On the Audit Log page, select **Add Itinerary** to download the utility and template.
3. Fill in all of the itinerary's information using the template.
4. Launch the utility from your desktop.
5. Select the Excel file to be loaded. The Excel file must be closed when uploading the itinerary.
6. Specify how many header lines are included in the Excel files; the header files will be ignored during upload.
7. Check the **Auto-convert all country names to usage** option to convert the country to the code required by the Everbridge service.
8. Click the **Preview** button and go to the **Logs** tab to preview the data.
9. Select the environment you want to load your itineraries to (Prod EU or Prod US).
10. Specify your organization ID. Organization IDs can be found in the Manager Portal under **Settings** > **Organization** > **Base Information** > **Organization ID**.
11. Specify your Manager Portal username and password. The user must have API access in the organization. Contact support for any questions.
12. Check the **Create new Contacts if no match is found** option to enable contact creation.

13. Select **Upload Itinerary.**



Notifications Overview

A **Notification** is a communication sent to a contact using the Notification settings and delivery methods specified in their contact record.



Everbridge recommends configuring the Notification to require confirmation from the contacts to record when they have confirmed receipt of the message.

After a contact confirms receipt of the message, the application stops sending the message to this contact.

Optionally, you can send a high-priority Notification. A high-priority message is dispatched by the system before messages with a lower-priority status. By default, the application uses a different greeting for voice messages when you send a Notification with high priority.

When the Notification is sent, it is an active Notification. A Notification has a duration, in hours, that it remains active. An Account Administrator or Organization Administrator configures the duration for which a Notification remains active.

When a Notification starts, all contacts are in the non-confirmed state. When they confirm they are receiving the message, they move into the confirmed state. If there is no contact path defined for a contact for any of the delivery methods used by this Notification, they are marked as unreachable. If they confirm after the Notification ends, they move into the confirmed-late state. You can monitor all of this activity using **Notification Results** and **Notification Reports**.

At the Account level, the Account Administrator can send Notifications across Organizations. However, at the Organization level, the Account Administrator:

1. Can add a scheduled or a recurring Notification.
2. Has access to publishing options.
3. Can use the Universe map to select contacts by geographic location.
4. Can enter Reply to E-mail addresses.

The Account Administrator can select the desired Organization and perform these activities.

Notifications Workflow

When you are creating a Notification, consider the type of situation that it's surrounding:

1. What type of Notification is this? The type of information provided in your Notification may be different. Is it informational (such as letting your contacts know that a tropical storm is expected to be in the area next week) or a pre-advisory alert (such as informing your traveling employees that a COVID Self-Declaration Travel form is required to enter the countries they have listed on their itineraries)?
2. How severe is this Notification? Is this Notification giving instructions for action or an advisory? Does this Notification have the potential to become more severe? In other words, you may need to update this Notification as the event progresses.
3. Which contacts in your Organization should receive the Notification? For example, a group of contacts or contacts in a specific location?
4. Will you need to escalate the Notification to other contacts and groups if you require responses?
5. What delivery methods do you want to use? For example, should this Notification be a text or an email?
6. Do you want confirmation from your recipients that they received the Notification and/or that they are safe or require further assistance?

For example:

- You receive an alert about a weather event affecting your county. You can send a standard Notification to warn your contacts of the situation.
- After the weather event makes landfall, you can send a follow-up to notify your contacts of the expected start time and end time of the weather event, and advise them of any evacuation plans.
- After the weather event passes, if required, you send a close Notification to notify your contacts that the weather event is no longer active.

After you assess the needs of your Notification, you can perform any of the following actions:

1. Select a Notification template and add your situation-specific information.
2. Send the Notification to your selected contacts.
3. Review the Notification details.
4. Update or send new Notifications as your situation changes.
5. Export report data to analyze and review performance and trends over a period of time.

There are a few ways to create and send a Notification from the Manager Portal. One way is from the **Notifications** tab. The other way is from the **Universe** tab. In either case, the **New Notification** panel appears.

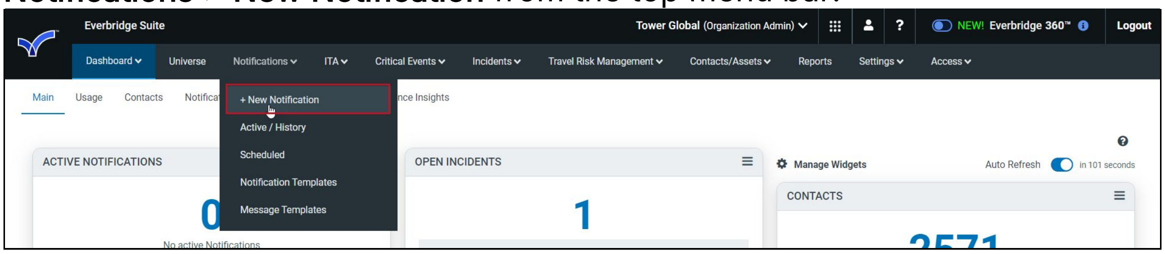
You have all the fields you need on one panel to send a Notification. The following are the parts of the Notification on which you will work.

1. Add the message. See Create Message Templates.
2. Select the contacts who are to receive the Notification. This includes individuals, groups, and rules. See Add Contacts to Notifications.
3. Configure the settings of your Notification. See Create a Notification.
4. Send the Notification. See Scheduled Notifications Tab.

Create New Notifications

The following procedure shows an example of creating and sending a Notification from the **Notifications** tab.

NOTE: The process below describes sending Notifications using the Everbridge 360 user interface. Users with the Legacy UI applied can click **Notifications** > **New Notification** from the top menu bar.

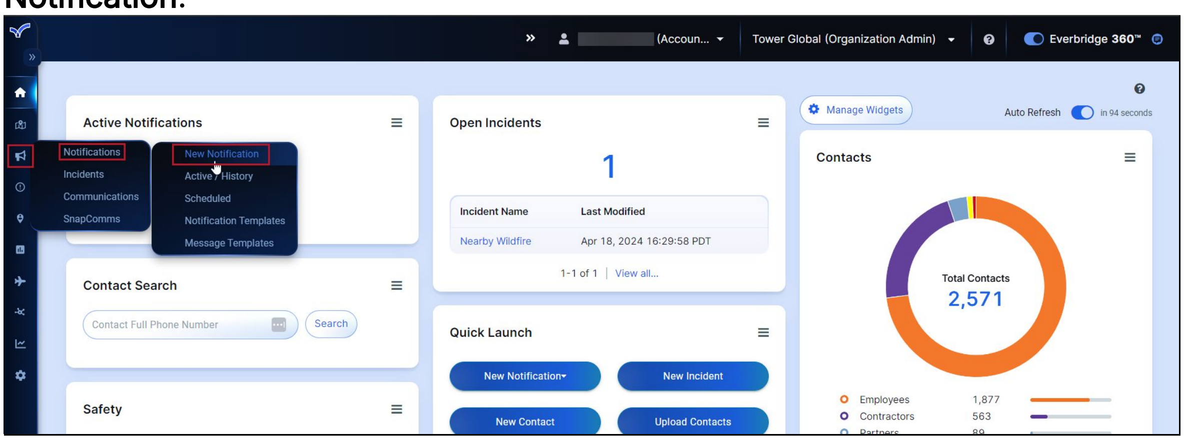


A chemical spill occurs at the Wall Street location. You need to notify the Hazardous Materials handling team to go to that location. Anyone around that location needs to evacuate, and the Fire Wardens need to monitor the evacuation. Managers and any individuals need to be notified as well.

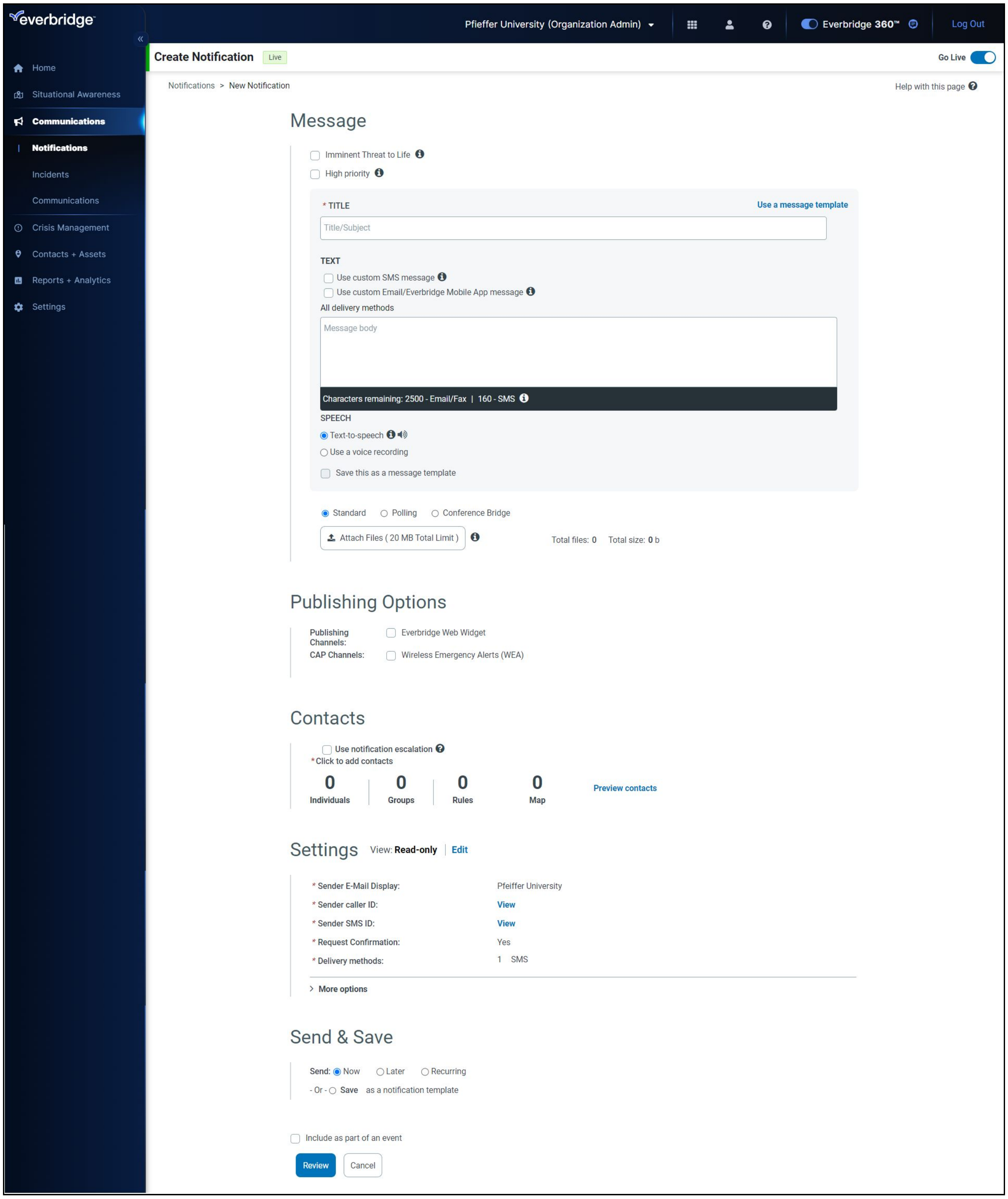
Message

This section contains the steps to create the content of a message. To do this:

1. From the **Communications** tab, select **Notifications**, and then **New Notification**.

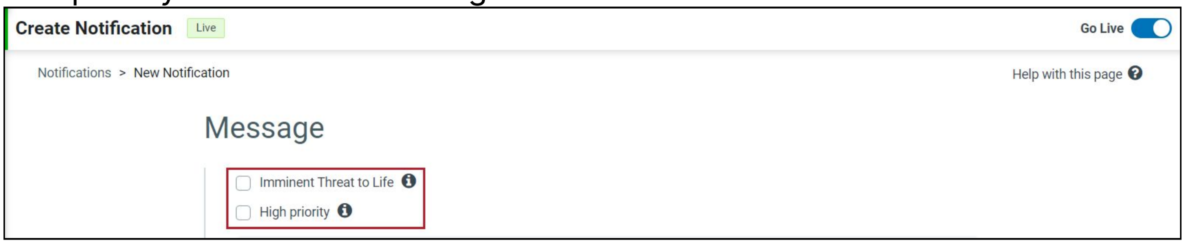


2. A blank Notification appears from which you can complete the necessary fields.



- Required fields have a red asterisk (*) next to their labels. If your Organization has **Simulation Mode** enabled, turn off the "Go Live" toggle in the upper-right of the Create Notification screen. Simulation Mode applies to new and scheduled Notifications, not Notification or message templates.

3. Select the checkbox if this is a high-priority message or a life-threatening situation; that is, an emergency situation. Leave the checkbox clear if this is a low-priority or standard message.

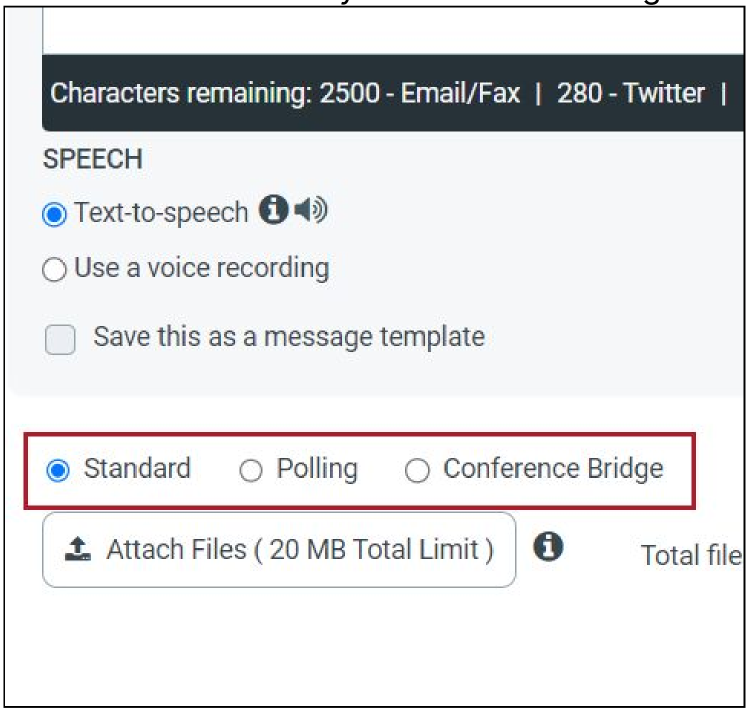


   - **Imminent Threat to Life** Notifications (if enabled for your Organization) flag events, incidents, or emergencies that pose an immediate and serious danger.
     - The following events are considered Imminent Threats to Life:
       - An Active Shooter event in the proximity of a recipient's location or a life-threatening weather event.
       - Has just occurred (for example, an earthquake, volcanic eruption or failed life-support system).
       - Is in-progress (for example, an active shooter or nuclear power plant emergency).
       - Is expected to happen today (for example, severe weather).
       - The lives or safety of message recipients are immediately at risk.
     - The following Notifications are not considered **Imminent Threat to Life**.
       - Notifications to recipients to inform them of an active shooter at another location, a weather event that will impact a different location, or a weather event that is still days away.
       - Notifications sent after the initial ITL message UNLESS there is a material change from the initial Notification AND the change results in an immediate increased risk to life and safety.
       - Notifications sent to recipients who are not at risk for life and safety regardless of the type of incident.
   - **High-priority** Notifications are given priority in your delivery queue and are flagged in each recipient's inbox.
4. Perform one of the actions below based on whether you are creating a new message or editing an existing message template.
   - If this is a new message, type a title. For example, **Chemical spill at Wall St**. If this message is sent by email, fax, or SMS, the title becomes the subject line.
     - Additionally, you can choose to enable or disable the use of the title in SMS delivery methods.
   - If this is an existing message template, click **Use a message template** above the **Title** field. Select the desired message and click **OK**.

The **Title** and **Text** fields are pre-filled with information from the message template.

5. Edit the **Title** and **Text** field text to make it unique for this situation, if needed.
6. Optionally, save this information as its own Message Template by selecting the **Save this as a message template** checkbox, located below the **Speech** field. See also Create Message Templates.
7. Optionally, select either of the following checkboxes:
   - **Use custom SMS messages** - Use this option to create custom SMS messages. When you select this checkbox, the **SMS Messages** field appears. See Use Custom SMS Messages.
   - **Use custom Email/Everbridge Mobile App message** - Use this option to create a separate message for Email/Everbridge Mobile App delivery methods. When you select this checkbox, a Rich Text Editor appears, which allows you to format emails. See Using the Email, Everbridge Mobile App Formatting Tools. When selected:
     - You can customize the email with text formatting features such as images, color, and tables. The custom email is delivered to Everbridge Mobile users as an attachment. They will also get email attachments.
     - Text entered in the first text field will only go to plain-text delivery methods (for example, SMS text, fax, or pager) and will be used for text-to-speech conversion.
8. Add a message by typing it in the **Text** field. The message will be used for email and text devices, and the text-to-speech engine will read it for voice delivery to phones.
   - You must enter at least one character in the **Text** field even if you want to send only Custom Email content to email address delivery methods.
9. Select the desired radio button in the **Speech** field:
   - **Text-to-speech** - Converts text entered in the **Text** field into an audio file for use with any phone delivery method. The language of the Text-to-speech preview is the language displayed in the **Settings** section of the Notification form. To listen to a preview of the recording, click the Audio icon, then click **Play**.
   - **Use a voice recording** - Select the desired **Voice** radio button. See Add a Voice Recording.
     - **Use Everbridge recorder**.
     - **Upload a file** - If you have a recorded voice message, you can upload the file.
     - **Use a telephone**.
10. If you want to save your message as a template, select the **Save this as a message template** checkbox.

11. Select the format that you want the message to be.



You can select from the following three options:

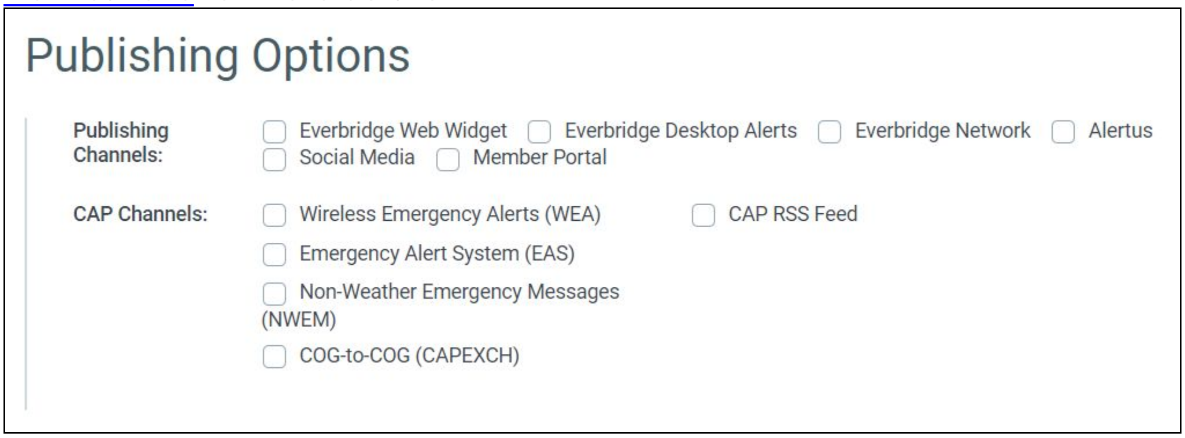
- **Standard** - A message for Contacts, meant only to provide information.
- **Polling** - Add options to solicit responses to the message. The contact can choose one of the options, and you will see them in Broadcast Results.
    - The following is the call flow when a polling message is sent:
        - The Voice platform connects the call.
        - The Voice platform detects a human (recipient answers the phone).
        - The application prompts the user to select an option.
        - The application plays an audio file of the polling options.
        - The application plays the prompt, “To replay this message, press Star”.
        - The recipient presses **Star** and the message and options are replayed.
        - Alternate path: The recipient does not press a key, pausing 3 or 4 seconds after listening to the polling options; the application assumes it has been interacting with voice mail and leaves a greeting, a callback phone number, and a message ID.
    - **Quota** - If you select **Polling**, then select the **Use quotas** checkbox. You can add options for contacts to respond to a list of choices and then you can manually send a Follow-Up with the results. For

example, if you need five volunteers to work the overnight shift on Saturday and Sunday, type **Need volunteers to work overnight on Saturday** with **#needed** as 5 and **Need volunteers to work overnight on Sunday** with **#needed** as 5**. Broadcast Results** show which contacts are willing to work. You can then send a follow-up letting everyone know who is working (perhaps the first five contacts to volunteer). You can also stop the quota.

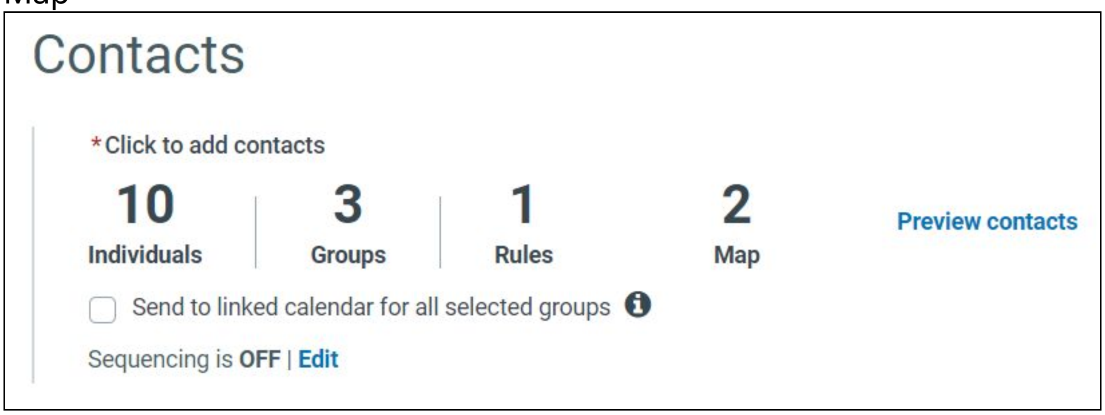
- **Conference Bridge** - This message allows recipients to join a conference call. This could be an emergency where contacts need to discuss the situation immediately. Or, it might be a convenient way to pull everyone together for the weekly status meeting. Contacts reached by phone can push a button to connect to the conference bridge. Contacts who receive a text message will see the instructions for joining the call.
    - **Everbridge Conference Bridge** Notifications can support up to 96 contacts.
    - **Custom Conference Bridge** and **Smart Conference Bridge** Notifications can support up to 250 contacts.
    - Up to 10 **Conference Bridge** Notifications can be active at one time.

12. You can attach files if the Notification will send via email, Everbridge Mobile App, or fax. To do this, click **Attach Files**.
    - You can attach up to five files, if necessary, to the message.
    - The total file size for all attachments is 20 MB.
    - If the total size of the attached files is more than 2 MB, a link is included in the Notification.
    - Each filename should be no more than 80 characters.
    - If the Notification is sent via fax, use file types that are receivable via a fax transmission (for example, no audio files). Fax attachment files should not contain macros or complicated formatting.
    - Everbridge accepts 178 different document types, including the more commonly used formats such as Microsoft Word, Microsoft Excel, PDF, and HTML.

13. Select the desired **Publishing Options**. See Publishing Options for Notifications for more details.



14. Choose which contacts should receive this Notification. They can be specified by:
    - Individuals
    - Groups
    - Rules
    - Map



15. Configure the other **Settings**:
    - Sender Email Display
    - Sender Caller ID
    - Sender SMS ID
        - Send an Incident or Notification with confirmation enabled, while also using your Organization-configured alphanumeric SMS sender IDs. SMS messages sent with this combination will instruct recipients to use a web link to confirm receipt of the message; they will not contain instructions about replying with "YES."
    - Request Confirmation
    - Delivery Methods
    - Delivery Order
    - Override Delivery Method and Quiet Time
    - Broadcast Duration

- Contact Cycles
- Interval between Cycles
- Reply-to Email
- Apply voice delivery throttling rules
- Voicemail preference
- Language

16. Choose whether the Notification should be sent immediately or scheduled for the future. See Send, Schedule, or Save Notifications for more details on these options.
17. Specify if this Notification should be included in an Event.
18. If an Administrator has required it, an additional Review step will be included at the end of the process. Click **Review** at the bottom of the page to see a summary of the messages, contact distribution, and publishing channels. Once the details have been checked and confirmed, click **Send**.

Notification Fields

The following table describes each field on the **New Notification** form.

Field Name	Required?	Description

Imminent Threat to Life	N	• Notifications flagged with Imminent Threat to Life (ITL) mean the event, incident, or emergency:
		  ◦ Has just occurred (for example, an earthquake, volcanic eruption, or failed life-support system).
		  ◦ Is in-progress (for example, an active shooter or nuclear power plant emergency).
		  ◦ Is expected to happen today (for example, severe weather).
		  ◦ The life or safety of message recipients are immediately at risk.
		• Examples of ITL messages:
		  ◦ Active Shooter event in the recipient's location
		  ◦ Life-threatening weather event that impacts recipients in the affected geographical region.
		• Messages not considered Imminent Threat to Life:
		  ◦ Notifications to recipients to inform them of an active shooter at another location, a weather event that impacts a different location or a weather event that is still days away.
		  ◦ Notifications sent after the initial ITL message unless:
		    ▪ There is a material change from the initial notification.
		    ▪ The change results in an increased immediate risk to life and safety.
		  ◦ Notifications sent to recipients that are not at risk for life and

		safety regardless of the type of incident.
High priority message	N	Select this check box if this is an urgent situation. High Priority messages are given priority in the delivery queue and are flagged in each recipient's in-box.
Use a message template	N	Message Templates allow you to view ready-to-use messages or view existing messages that are partially built and can be edited to be used. To use a message template, click the link. Then, select the desired message template title and click **OK**.
Title	Y	Type a name for the notification up to 255 characters. The title is included in messages sent to email and fax delivery methods. Additionally, you can enable or disable the use of the title in SMS delivery methods.
Body	N	1. If you have already added and saved a message for this type of notification, you can select it from the **Message Template** list. See Create Message Templates. 2. To add the message, type it in the **Body** text box. The message is used for text delivery to email and SMS devices, and a text-to-speech engine reads it for voice delivery to phones. See the Knowledge Base article in the Everbridge Support Center.
Use custom SMS message	N	Use this option to create a separate message for SMS delivery methods. You can include up to 160 characters of an SMS-only message. • When you include **Add Web Page Message**, you can customize the SMS with text formatting features such as

		images, color, text sizes, and tables. See Use Custom SMS Messages • If you use this option, the text entered in the other fields are sent only to plain text delivery methods (for example, fax or pager) and are used for text-to-speech conversion.
Use custom Email/ Everbridge Mobile App message	N	Use this option to create a separate message for email or Everbridge Mobile App delivery methods. • You can customize the email with text formatting features such as images, color, text sizes, tables, and so forth. See Using the Email, Everbridge Mobile App Formatting Tools. • If you use this option, the text entered in the other fields will sent to only plain text delivery methods (for example, SMS text, fax, or pager) and are used for text-to-speech conversion.

Speech	N	Select the desired radio button.
		• **Text-to-Speech** — Select this radio button to convert text entered in the Body into an audio file for use with any phone delivery method. The language of the Text-to-Speech Preview is the language selected as the default language, or the language selected in Settings of the notification form. To listen to a preview of the recording, click the Audio icon, then click Play in the Text-to-Speech Preview dialog. (Separate email content is not utilized for Text-to-Speech.)
		• **Use a voice recording** — Select this radio button, then select the desired radio button:
		  ◦ Use Everbridge recorder
		  ◦ Use a telephone
		  ◦ Upload a file

		See Add a Voice Recording.
Save this as a message template	N	Select this check box to reuse this message for future notifications. The application will save the content in Title, Message Body, and Voice Recording as a message template.

Message type	N	Select from:
		• **Standard**—a basic alert message.
		• **Polling/Quota**—includes options for contacts to respond to a list of choices; you see the answer in the Broadcast Results.
		• **Conference Bridge**—the contact is able to connect to a conference bridge upon receiving the notification.
		  ◦ Everbridge Conference Bridge notifications can support up to 96 contacts.
		  ◦ Custom Conference Bridge and Smart Conference Bridge notifications can support up to 250 contacts.

Attach Files	N	Attach files to the message if the notification is to be sent via email, fax, or Everbridge Mobile App. You can attach up to 5 files. The maximum file size is 20 MB. If the total size of the attached files is more than 2 MB, a link is included in the notification. Each filename should be no more than 80 characters. If the notification is to be sent via fax, then ensure you are using file types that will be accepted by a fax (for example, no audio files) and that those files do not contain macros or complicated formatting.
Publishing Options	N	Select the desired **Publishing Channels** check boxes: • **Everbridge Desktop Alerts**—Send a Standard message as a full-screen

		notification sent directly to your recipients' desktops. • **Everbridge Network**—Share the notification with the organizations you have indicated. Optionally, you can use a shape to specify the impacted area to your network. Additionally, you can select **Network Groups** if your organization has enabled them. • **Everbridge Web Widget**—Send a Standard message to your designated website using this public executable widget. • **Alertus**—Relay important emergency alerts through Alertus, an Everbridge Partner providing desktop alerts, alert beacons, and digital signage • **Web Posting**—Send the message to partner systems or client-side web sites, you can provide one or more URLs. Optionally, provide a corresponding username and password for each URL. • **Social Media**—Post your notification to Twitter and/or Facebook. • **Nixle Channels**—Send your notification to Nixle Community Subscriber opt-ins and/or Nixle Event Subscribers. • **Member Portal**—Send your standard notification to the Member Portal members. Polling and Conference Bridge notifications are not supported. The notification will be published to the Notification page of the Member Portal. Publishing Options are not available for notifications sent from the Account level. • **CAP Channels**—Select the desired CAP Channel check boxes. These channels are available to agencies with valid COG IDs. The agencies can

		send messages to the public via mobile phones, radio, and television. ◦ Wireless Emergency Alerts (WEA) ◦ Emergency Alert System (EAS) ◦ Non-Weather Emergency Messages (NWEM) ◦ COG-to-COG (CAPEXCH) • **CAP RSS**—Unlike the channels above, you can save CAP RSS as a template and launch CAP RSS from a template. • **Google Public Alerts**—Google Public Alerts is an online notification service owned by Google.org that sends safety alerts to Australia, Brazil, Canada, Colombia, Indonesia, Japan, Mexico, Philippines, and Taiwan. • **Audio Bulletin Board**—Your notification can include a phone number for the users to call and hear the message.
Select Contacts	N	Optionally, select the check box: **Use notification escalation**. For information about selecting contacts if Resident Connection is enabled, see Resident Connection Add Contacts to Notification For more information about Escalations, see Adding Notification Escalations.
Click to add contacts	Y	A contact is a recipient of the notification. You can select contacts by Individual, Group (contacts in a group), and Rules. (This is a targeted population within your database. It is dynamic in nature. The rule is stored, not the results.). At the Organization level, you can also select contacts by map location. For more information about Contacts, see Managing Your Contacts.

Incident Zone	N	You must have at least one shape on the map to use this feature. Public Incident Zones are used by State and Local Governments, where the end-user locations are anonymous. Private Incident Zones, a Safety Connection feature, are used to see which employees are in an impact area and message them. For a Public Incident Zone, the **Mobile Push Alert** delivery method must be enabled in the organization as well. For a Private Incident Zone, the **Mobile Push Alert** is not required to be enabled. • **Geo-target** — When you have a polygon on the map, and the Everbridge Mobile app Location Services = ON (on the recipients' cell phones), the recipients will get push notifications. • **Geo-fencing** — All geo-contacts who are in, or enter, the area defined by your polygons will receive this message. For Public Incident Zones, Everbridge will be added as a Delivery Method and the Contact Cycles will be set to 1. For Private Incident Zones, the Contact Cycles can be set to more than 1. Only the Standard message type can be used in a Public Incident Zone. Only Standard and Polling message types can be used in a Private Incident Zone. The Conference Bridge message type cannot be used with the Incident Zone feature.
Settings	Y (Sender email display, Sender caller ID, and Delivery methods)	The default settings are displayed. Change the Settings values for the notification by clicking Edit, changing the desired settings, and clicking Hide. If you are sending notifications from the Account level, ensure you have the same delivery methods in the Account and the Organization. For example, if the Account

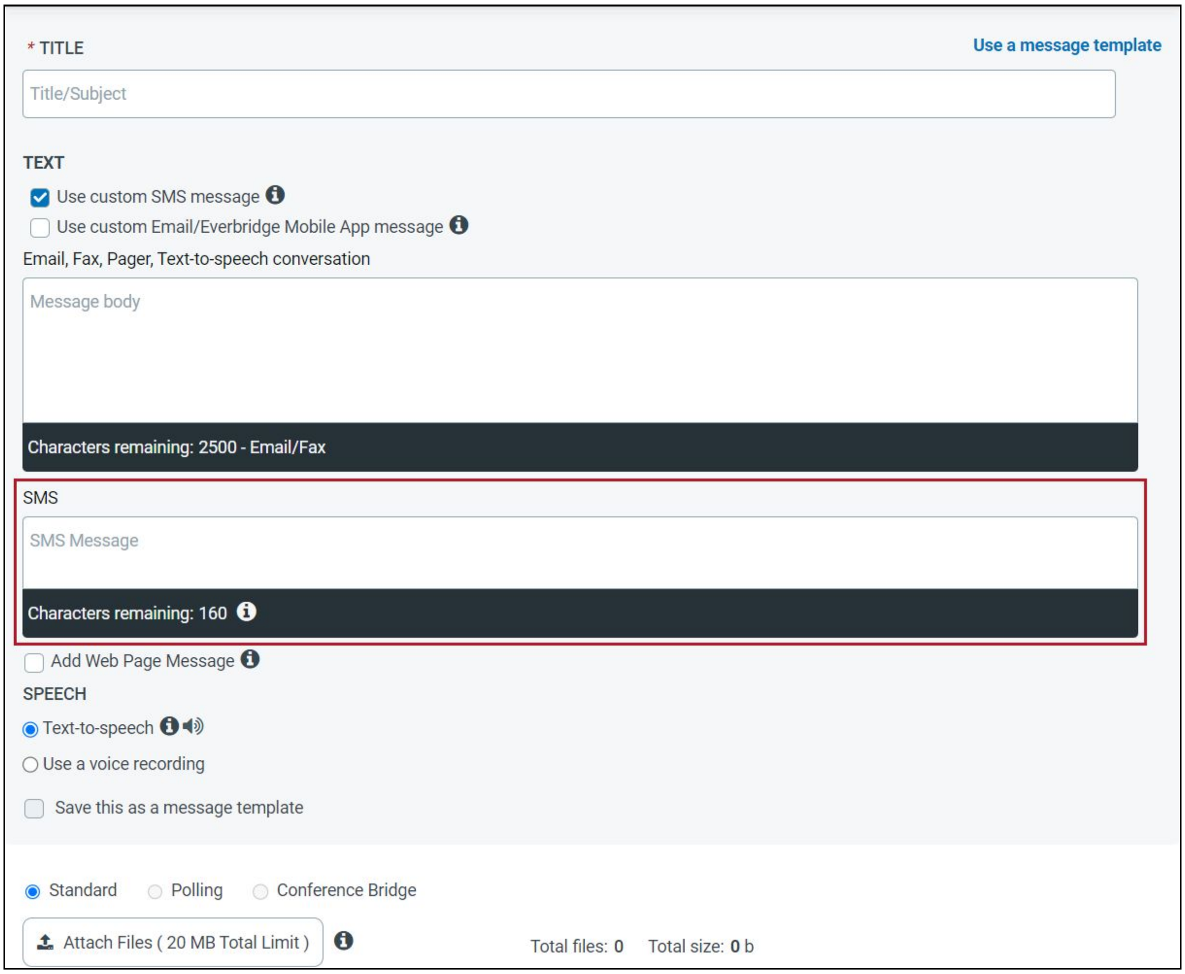
		has three organizations, and the Account Administrator wants to send a notification across the organizations to "Email Address 1", each organization must have an "Email Address 1" delivery method. For more information about Settings, see Notification Settings.
Send & Save	Y	Select the desired Send option: • **Now** — Defaults to send immediately. • **Later** — To schedule the notification to automatically launch at a later date and time. Click the Calendar icon, then select the future date and time for the notification. • **Recurring** — To configure how often to send the notification. Select the Time Zone from the menu, then click the Calendar icon to select the date ranges and click the Clock icon to select the time. • **Save as a Notification Template** — To save this notification as a template so it is ready for you to send when you need it. You can save it in a Category to make it quicker for you to find when you want to send it. Select one of your previous Category names from the menu or enter a new category name directly into the text box. Additionally, you can save the Notification Template with a Template ID using up to 20 numeric characters not starting with zero (0). This allows you to launch your notification by phone when you have no access to the Internet or Wi-Fi.
Include as part of an event	N	Select this check box if yes. Then, select an existing event from the drop-down list or type an event name in the text box. See also Events.

Use Custom SMS Messages

When sending a Notification, select the **Use Custom SMS message** checkbox to display a separate text field for your SMS message.

To use a custom SMS message:

1. From the **New Notification** page, select **Use Custom SMS message**. A separate SMS text box appears.



2. If your Organization has enabled a Message Prefix, set the **Message Prefix** toggle to On. You immediately see the prefix appear as the first item in your SMS message. Note that the prefix is set by your Organization and the number of characters counts against the 160-character limit.
3. Type your SMS message, up to 160 characters.
4. Optionally, select **Add Web Page Message**. A link will be added to the end of your SMS to view your Web Page message. Type and format your Web Page message.
5. Continue activities to send your Notification.

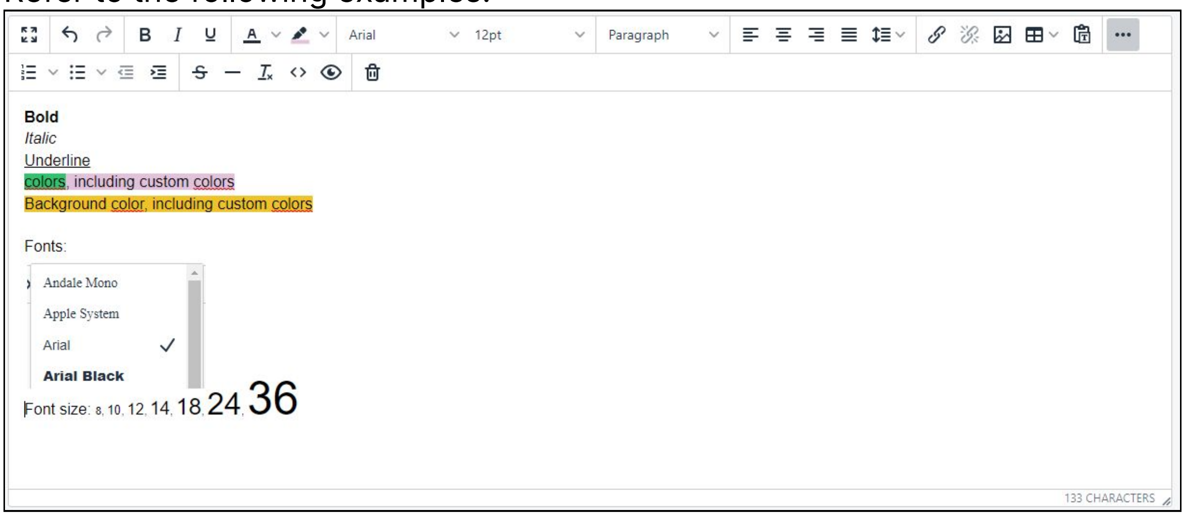
6. After the Notification is sent, review the Notification Details.
7. Optionally, you can download the Detailed Notification Analysis Report and/or download the zip folder that includes a Comma-Separated Values (CSV) file of contacts sent the Notification, the Notification details, Notification attachments, voice files, and shape files.

Using the Email, Everbridge Mobile App Formatting Tools

The formatting tools are available from the **Email, Everbridge Mobile App** pane (with **More options** displayed). Hover the mouse over each tool to see the bubble label. From left to right, each tool is described in the following procedures.

To format your Email, Everbridge Mobile App text:

1. Type your text in the **Email, Everbridge Mobile App** pane.
2. Select the text and click the desired formatting tool.
3. Refer to the following examples.



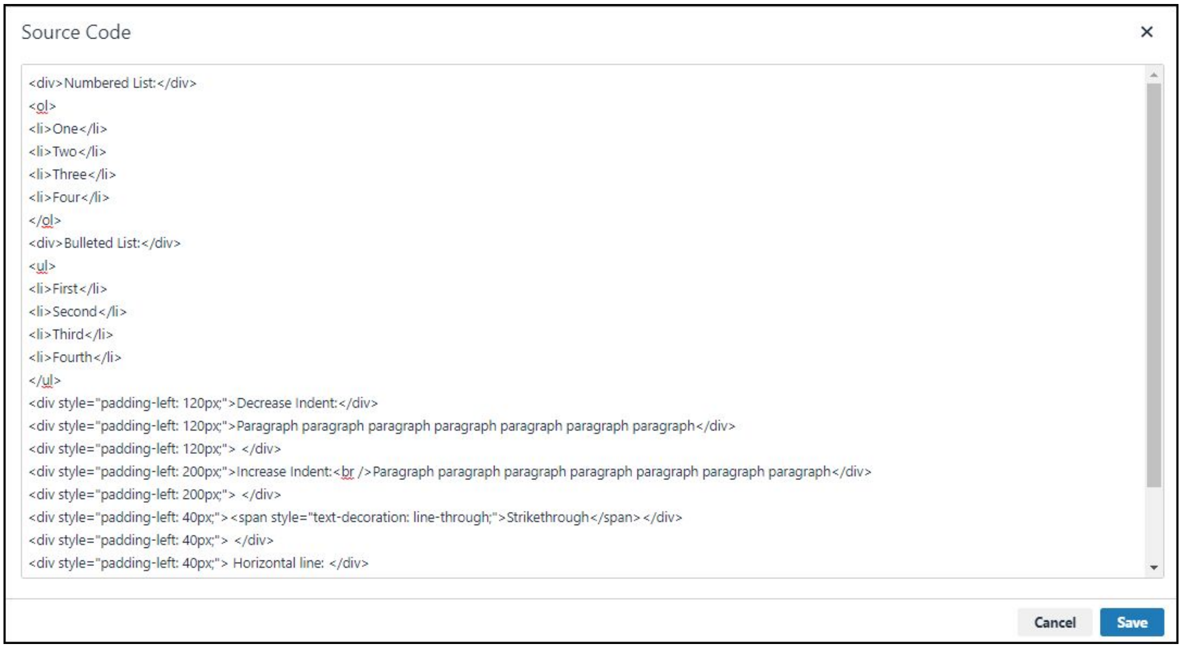
TIP: Before sending anything, Everbridge recommends that you test the system to ensure you know how it will function.

Convert your text to HTML

To convert your text to HTML:

1. Using the **Email, Everbridge Mobile App** pane, enter your text.

2. Click the Source Code (**< >**) icon. The **Source Code** dialog displays your text in HTML.



3. Click **Save**.

Upload an Image Into Your Custom Email

There are three ways to insert an image into your custom email.

- Copy and paste from an external source (except for Microsoft Word).
- Use one of the following **Insert Image** tools:
  - Enter a URL address to retrieve an image from an Internet-accessible server.
  - Choose a file from your computing device.

To upload an image:

1. Select the **Insert/Edit Image**.
2. Do one of the following:
   - **General** — Fill in the information fields.
   - **Upload** — Drag-and-drop the image onto the window or browse for the image.
3. Click **Save**.

Copy Content Into Your Custom Email Without Characters or Formatting Tags

If you do not want hidden characters or formatted text in your custom email when you copy/paste from an external source, you can use the **Paste as Text** tool. To do this:

1. Select **Paste as Text.**
2. Copy the desired text from your external source.
3. Paste directly into the message window.

About Custom Email Tables

The easiest way to enter a table in the **Email, Everbridge Mobile App** pane is to copy and paste from an external source such as Microsoft Word. Alternatively, insert a table directly into the **Custom Email** field.

To insert a table directly into the custom email:

1. Place the mouse cursor where you want the table.
2. Select **Insert Table.**
3. Select the cells (columns and rows) of your table.
4. Click the table to display the properties you can change. You can also make the same changes by clicking the **Table** tool again.

To preview your custom Email, Everbridge Mobile App message:

1. After you enter your custom message, click the **Preview** tool to see how it will appear.
2. Click **Close** when done.

Add a Voice Recording

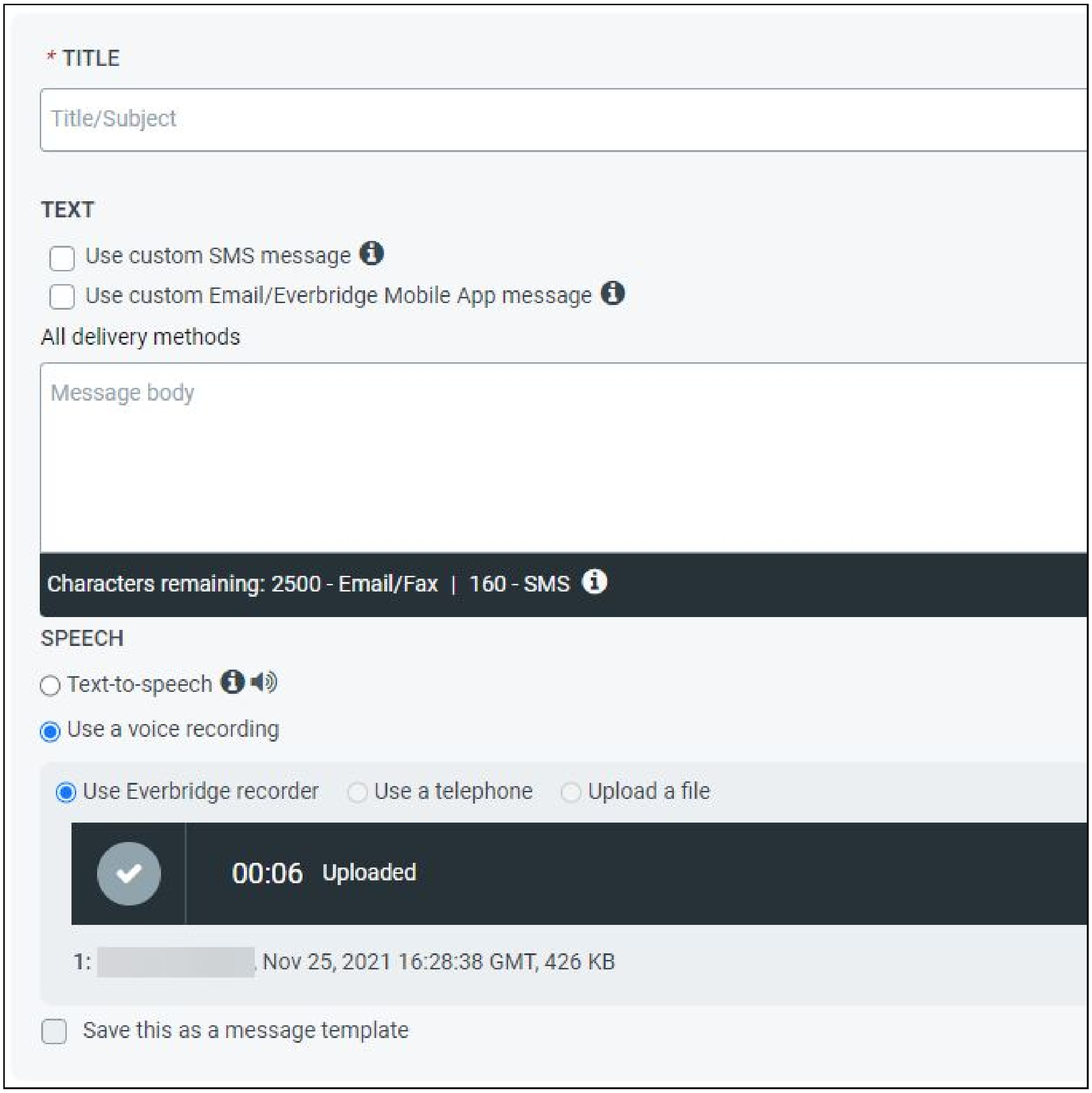
There are several ways to create a voice recording, such as:

- Everbridge Recorder (uses the computer's microphone)
- Use a telephone
- Upload a file

Using the Everbridge Recorder

To add a new voice recording using the Everbridge Recorder:

1. From the **Message Templates** subtab, click **New Message Template**. The **Add Message Template** page appears.
2. Type a title for this message.
3. Type the Body of the message. When you send this message to a text path like email or SMS, this is the message text that is sent. If you are only going to deliver this message over voice paths, the body text is recommended, but not required.
4. Select the **Use a Voice Recording** checkbox.
5. Select **Use Everbridge recorder**.
6. Click the red circle and record the message to be played on the voice paths. If a Camera and Microphone Access dialog appears, click **Allow**.
7. Begin speaking into your microphone. Your recording must be less than five minutes in length.
8. Click the green circle when you are done. You see your recording listed with your name, date, time stamp, and size.



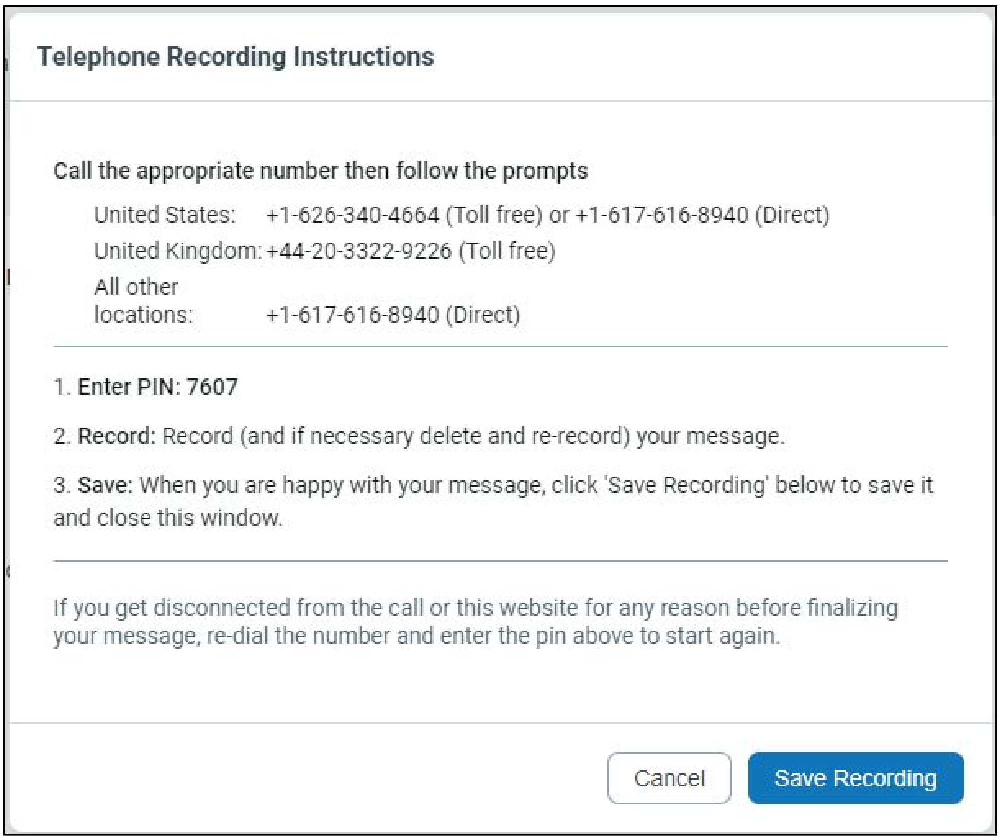
9. To listen to your recording, click the **Audio** icon next to the **Trash Bin**.
10. If you are dissatisfied with your recording, record it again by repeating Steps 4 through 9.
11. Optionally, assign the template to a Category to make it easier to find in the list. Select from the menu or type the Category name directly in the textbox.
12. Click **Save**. The template is on the **Message Templates** list and ready to be used in a Notification as a Voice message.

> **NOTE:** At the Account level, the Account Administrator sees only the messages saved in the Account level.

Add Voice Recording Using Landline Telephone

To add a new voice recording using a landline telephone:

1. From the **Message Templates** subtab, click **Add**. The **Add Message Template** page appears.
2. Type a title for this message.
3. Type the Body of the message. When you send this message to a text path like email or SMS, this is the message text that is sent. If you are only going to deliver this message over voice paths, the body text is recommended, but not required.
4. Select the **Include a Voice Recording** checkbox.
5. Select **Use a telephone**.
6. Click **Open recording instructions**. The **Telephone Recording Instructions** will appear.



7. Follow the instructions to record your message and click **Done**. If you are using a poll, set up your poll first, then record to allow for poll responses over the phone.
8. Optionally, assign the template to a Category to make it easier to find in the list. Select from the menu or type the Category name directly in the textbox.
9. Click **Save**. The template is on the Message Templates list and ready to be used in a Notification as a Voice message.

NOTE: At the Account level, the Account Administrator sees only the messages saved in the Account level.

Upload a Message

To upload a message:

1. From the **Message Templates** subtab, click **Add**. The Add Message Template page appears.
2. Type a title for this message.
3. Type the Body of the message.
4. Under Speech, select:
   - **Text-to-Speech**: When you send this message to a text path like email or SMS, this is the message text that is sent. If you send this message to a voice path like a phone, a text-to-speech engine reads this message to the contact.
   - **Use a Voice Recording**: For voice recordings, make sure the file you want to upload matches the technical specifications for a file. (See the specifications below.) Everbridge uses the following file format for delivering the audio message: 8K Hz 8 bit mono mu-Law, or uncompressed PCM WAV Everbridge can also convert the following file formats:
     - 8K Hz 8 bit PCM
     - 8K Hz 16 bit PCM
     - 8K Hz 4 bit ADPCM
     - 8K Hz GSM 06.10
     - 8K Hz mu-Law
     - 11K Hz 8 bit PCM
     - 11K Hz 16 bit PCM
     - 11K Hz 4 bit ADPCM
     - 11K Hz GSM 06.10
     - 11k Hz mu-Law
5. Click **Upload a file.**
6. Select the file to upload.

NOTE: The file cannot exceed 2.4 MB; otherwise, you must reduce the file size and upload it again.

When the progress bar is full, the file has been uploaded. If you need to change the file, click the Trash Bin.

7. Optionally, assign the template to a Category to make it quicker to find in the list. Select from the menu or type the Category name directly in the textbox.
8. Click **Save**. The template is on the Message Templates list and ready to be used in a Notification as a Voice message.

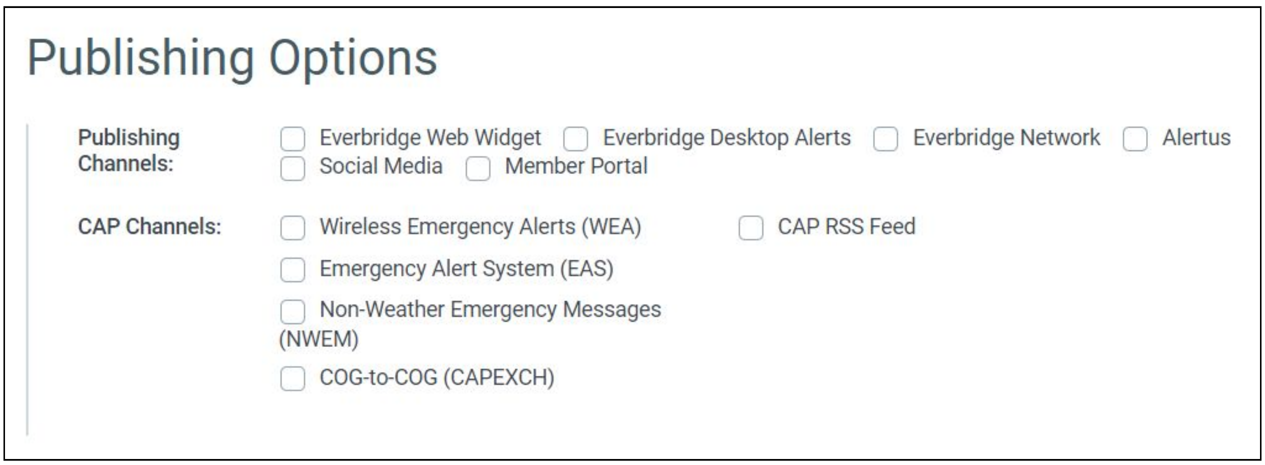
> **NOTE:** At the Account level, the Account Administrator sees only the messages saved at the Account level.

Publishing Options

Everbridge Suite offers several options for sending messages to a gateway. This allows the wide distribution of important information to contacts.

> **NOTE:** Publishing options are not available for Notifications sent at the Account level.

Select your desired **Publishing Options.** You see the publishing options your Organization has configured. When sending any publishing option, the **Title**, **Text**, **Select Contacts**, **Delivery Methods**, and **Information** fields cannot be empty.



- **Everbridge Web Widget** - This Notification is published to the Organization's designated website for the duration specified.
- **Everbridge Desktop Alerts** - This Notification is sent to the Organization's recipients' desktops for the duration specified.
    - Recipients must be configured with the Desktop Alert client. Templates are pre-configured for Desktop Alerting (that is, these templates are not Everbridge message templates or Everbridge incident templates).
- **Everbridge Network** - This Notification is published to the Public Everbridge Network or Private Network group if configured. Optionally, you can use a shape to specify the impacted area to your network.
- **Alertus** - Provides a way for personnel to relay important emergency alerts through Alertus, an Everbridge Partner providing desktop alerts, alert beacons, and digital signage. Select the check box corresponding to your Alertus profile in **Settings** > **Publishing Options** > **Alertus**, then select the username or URL from the menu.

- **Web Posting** - To initiate Notifications to partner systems or client-side websites, you can provide one or more URLs.
    - Optionally, provide a corresponding username and password for each URL
- **Social Media** - Post your Notifications to Twitter and/or Facebook accounts. Select the linked account(s) from the menus.
    - Optionally, for Twitter, select the **Link tweet to a web page** check box. Your tweet links directly to a web page that contains your message Title and Body (with Rich Text Formatting applied if applicable) as well as attachments.
        - Since Twitter messages are limited to 280 characters, Everbridge truncates the Body text to allow for a URL to a web page and an image if specified. Truncation rules are as follows:
            - If a web link is included, your tweet is truncated to 256 characters.
            - If a web link and an image are included, your tweet is truncated to 232 characters.
- **Audio Bulletin Board** - The contacts can listen to messages on the Audio Bulletin Board.
    - **Audio Bulletin Board Basic** - Select the Audio Source and the Expiration time: no expiration, 1-30 days, or 1-24 hours.
    - To retrieve an audio message, see the Audio Bulletin Board Knowledge Base article in the Everbridge Support Center. The person retrieving an audio message must know your Organization ID and have a valid phone number.
    - **Audio Bulletin Board Premium** - In addition to the Basic selections above, also select the Bulletin Board name from the menu.
- **CAP Channels** - To include CAP RSS in your message, select CAP RSS on the message form. Notice a CAP RSS column appears at the right-hand side of the fields. The gray bullets indicate the applicable fields to the CAP RSS channel. Fill in the fields, as needed.
    - Your CAP RSS form in Incident Management excludes the Polygon field.
    - Optionally, save the CAP RSS Notification as a Notification template. Later, you can launch the Notification from the template. For detailed information on the other CAP channels, see IPAWS Overview.

Google Public Alerts

Google Public Alerts is an online Notification service owned by Google.org that sends safety alerts to Australia, Brazil, Canada, Colombia, Indonesia, Japan, Mexico, Philippines, and Taiwan.

The Google event names are provided in the following table. You may or may not see all the categories shown next. It depends on which ones have been enabled for your Organization.

Category	Event name
CBRNE (Chemical, Biological, Radiological, Nuclear, and Explosives)	Bioterrorism Attack
	Chemical Emergency
	High-Yield Explosive Attack
	High-Yield Explosive Threat
	Mass Casualties
	Nuclear Attack
	Radiation Emergency
Environmental	Acid Raid
	Air Pollution
	Noise Pollution
	Soil Contamination
	Toxic Waste
	Water Pollution
Fire	Forest Fire
	Wildfire
	Industrial Fire
	Rescue Operation
	Structure Fire
Geophysical	Avalanche
	Geomagnetic Storm

	Landslide
	Mudslide
	Radio Blackouts
	Solar Radiation Storm
	Volcanic Eruption
Health	Boil Order
	Foodborne Disease Outbreak
	Influenza Epidemic
	Virus or Other Contagious Disease Outbreak
Infrastructure	Buildings and Equipment
	Gas Leak
	Power Outage
	Telecommunications Emergency
	Utility Emergency
	Water Control Facilities
	Public Safety Power Shutoff (PSPS)
Meteorological	Blizzard Warning
	High Wind Warning
	Severe Thunderstorm Warning
	Winter Storm Warning
Rescue	Air-Sea Search and Rescue
	Ground Search and Rescue

	Urban Search and Rescue
	Mountain Rescue
Public Safety	Attempted Child Abduction
	Debris Removal
	Power Outage
	Road Closure
	Severe Weather Warning
	Evacuate Immediately
Security	Amber Alert
	Missing Child
	Police Activity
	Attempted Child Abduction
	Attempted Kidnapping
	Criminal Activity
	Kidnapping
	Ongoing Investigation
	Silver Alert
	Suspect Wanted
	Wanted Person
	Traffic Emergency
Transportation	Road Closure
	Snow Emergency

	Train Derailment
	Travel Emergency
	Travel Warning
	Vehicle Accident

Notification Escalations

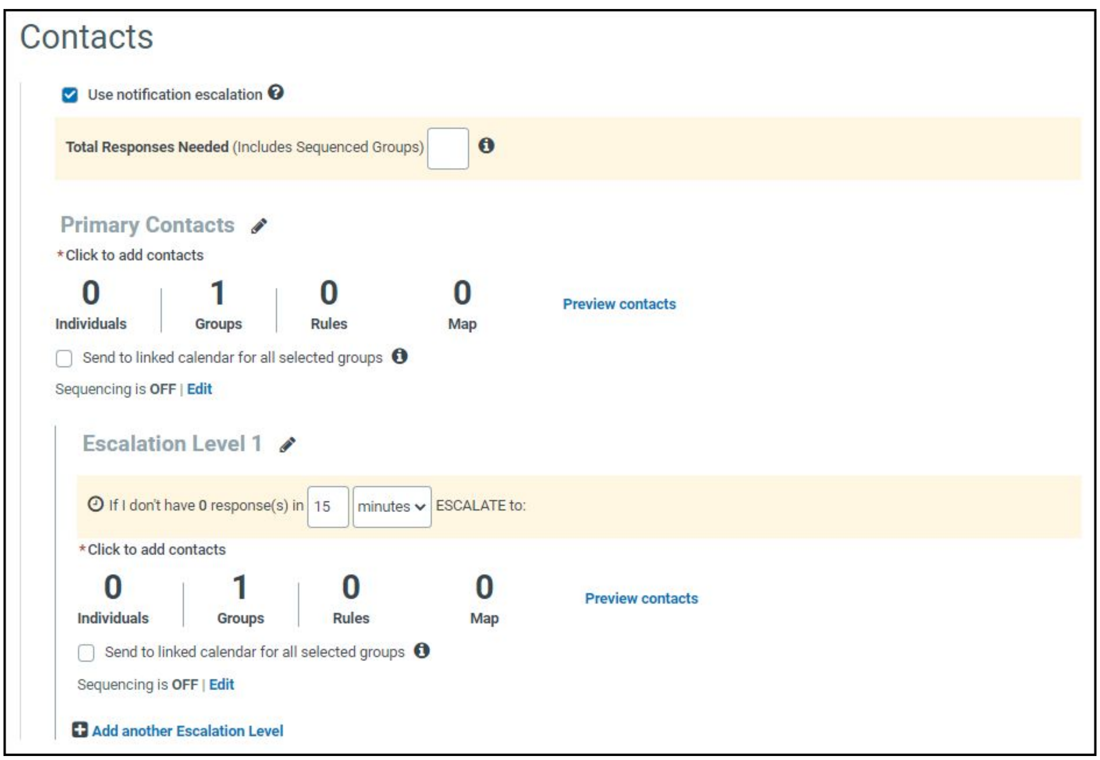
You can add escalations to your Notification if you want to contact recipients in a specific order. You can define a primary set of contacts and an unlimited number of escalation levels. You also configure the number of required responses and the escalation wait time before the application escalates to the next set of contacts. When the application receives the required number of responses to the Notification, the escalation stops.

To use Notification escalations:

1. If available and needed, optionally, select the **Use Notification escalation** checkbox. Otherwise, skip to Settings.

   > **NOTE:** Escalations can be used in the following message types: **Standard**, **Polling**, and **Conference**. The same message type and settings are used for all escalations in a Notification. For example, each escalation level has the same Broadcast Duration. It is feasible that the broadcast duration of the escalations could overlap.

   Two contact levels are displayed by default. The **Primary Contacts** level is the first Notification before triggering escalations.



2. In **Total Responses Needed**, type the number, which cannot be zero, of required responses needed from the primary contacts before escalating the Notification beyond the Primary Contacts. This is a required field.
   - If you are using Notification escalations, the **Total Responses Needed** include Sequenced Groups. For example, if the **Responses Needed** is 1 from both the **Edit Sequenced Group Settings** dialog and the **Total Responses Needed** (includes Sequenced Groups) in the **Select Contacts** panel, and a contact responds, the Sequenced Group and the Notification Escalation stop sending as soon as a contact from the Sequenced Group responds.
   - If the **Responses Needed** from the **Edit Sequenced Group Settings** dialog is 1 and the **Total Responses Needed** (includes Sequenced Groups) in the Select Contacts panel is 2, and a contact responds, the Sequenced Group stops, but the Notification escalates until it gets the second response.
   - If you are using Notification escalations and the **Polling** message type, the application escalates to the next level if all the responses to a polling Notification in the current escalation level are not the response the message sender wants to monitor. An unreachable contact is considered a "No" response.
3. Use the steps outlined in Add Contacts to Notifications to enter your Primary Contacts.
4. In the **Escalation Level 1** pane, type the specified time you want to escalate to another set of contacts if you do not have the expected number of responses from the **Primary Contact** level. For **Minutes**, the minimum allowed number is 1 and the maximum is 1440. For **Hours**, the minimum allowed is 1 and the maximum is 24. Then, select **Minutes** or **Hours** from the menu.

   NOTE: If you enter a number less than 15 minutes, note that the time starts once the Notification is sent. This escalation may be triggered before all confirmations are received from the previous Notification depending on the number of contacts, the delivery methods, and confirmation requests in the previous Notification.

5. Use the steps outlined in Use Sequenced Groups to enter your Escalation Level contacts.
6. Click **Add another Escalation Level** to add another escalation. When you click the link, the number of the Escalation Level increments by one. You can add as many escalations as you need. Repeat step 4 through step 6, as needed.
7. Optionally, rename the levels by clicking the Pencil icon next to the name, typing its new label, and clicking **Edit**. For example, you can rename **Primary Contacts** to **Select Primary On-Call**.

Add Contacts to Notifications

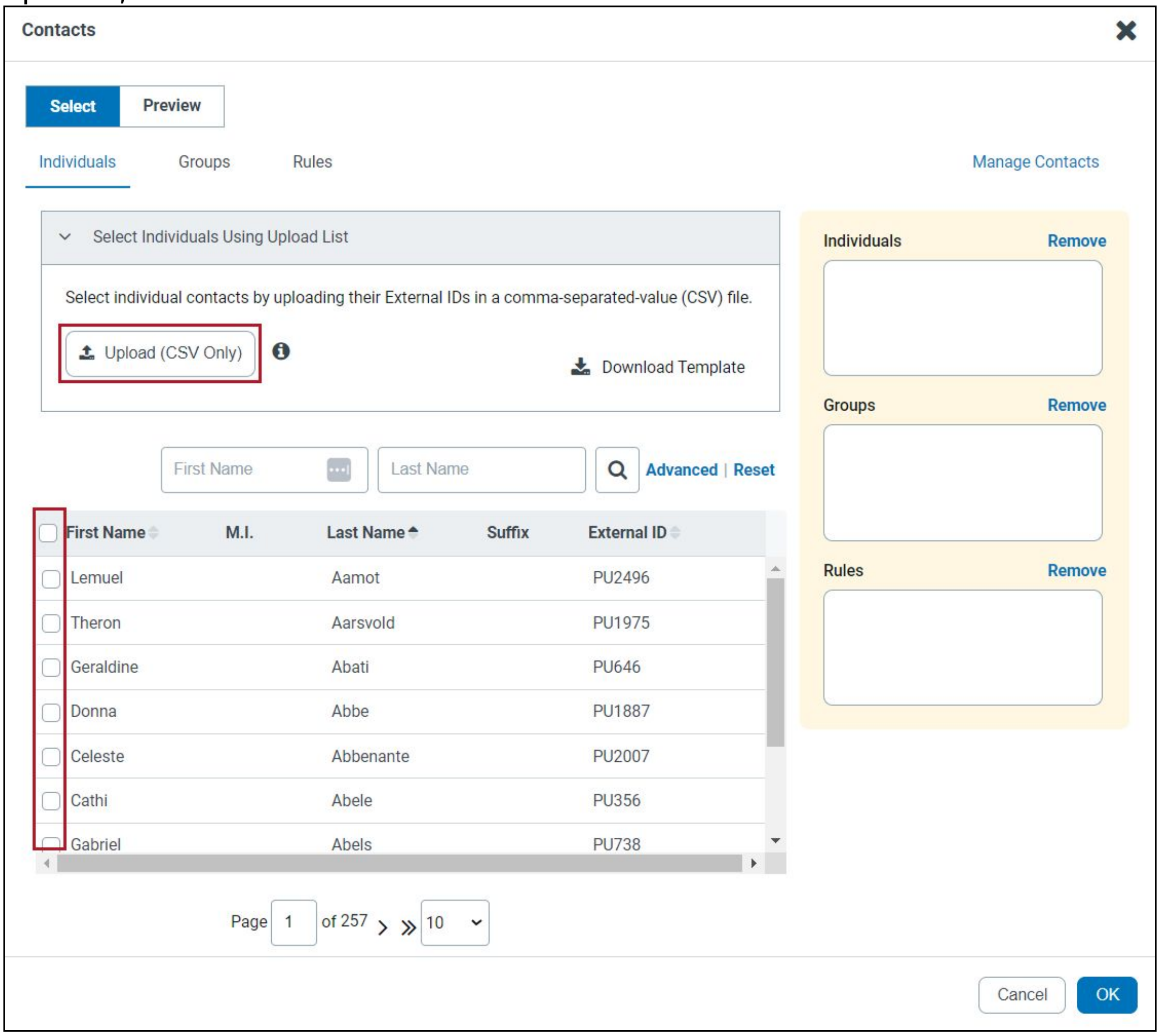
This section of the Notification is where you add its contact recipients. Contacts can be selected by individuals, groups, or rules.

> **NOTE:** Select the Organization name from the drop-down list if you are an Account Administrator using the Account's Notifications tab. This allows you to select contacts across Organizations.

Individuals

1. To select individual contacts, click **Individuals**. The **Select Contacts** page appears.
2. Select the check box of the desired contact names. You can search by first and last names as well. The individuals appear in the right-hand panel.
3. If many contacts need to be selected in bulk, uploading a CSV file with the contacts' External IDs is a great way to save time. The CSV file can contain

up to 15,000 records.



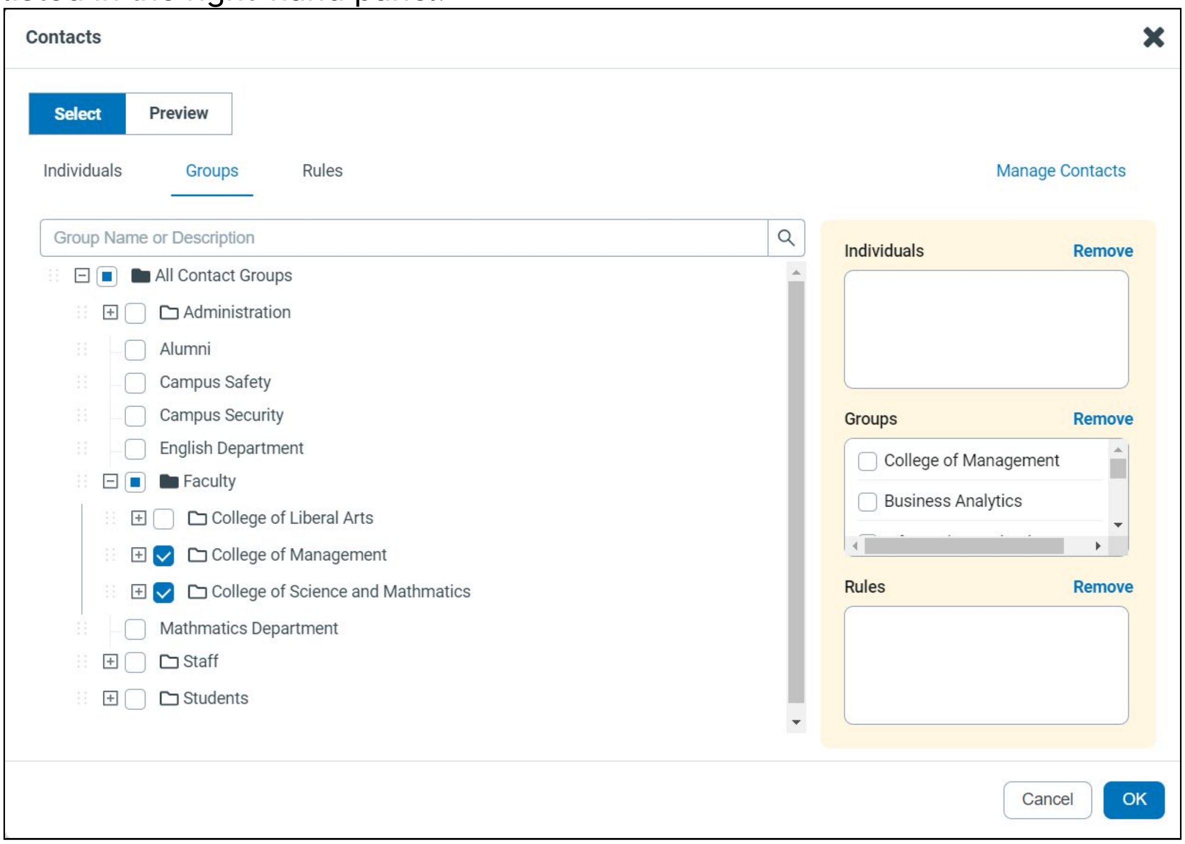
4. Once the desired contacts have been selected, click **OK**. The selection will now be reflected in the **Contacts** modal on the previous screen.

Groups

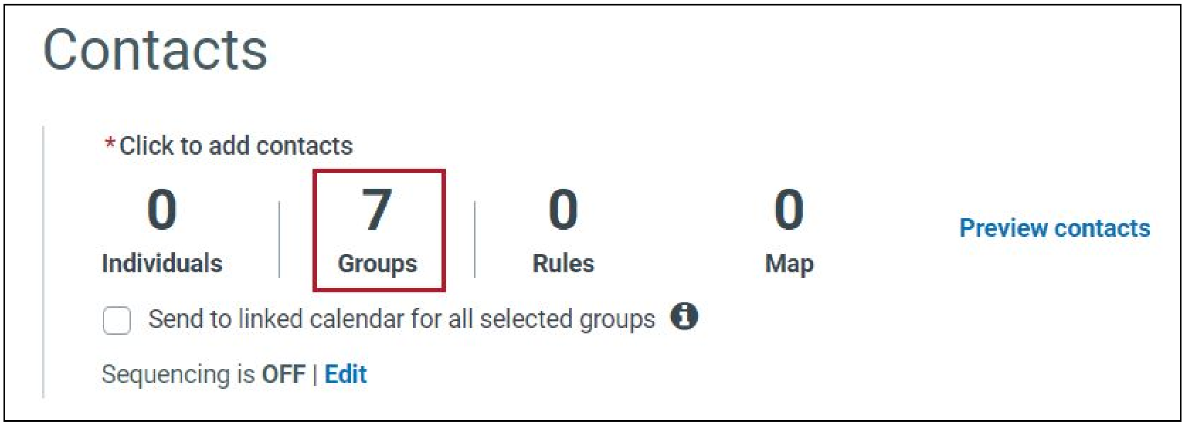
1. To select contacts in a group, from the **Select Contacts** page, select the **Groups** subtab. (See Create Groups.) The **Select Groups** page appears.

> **NOTE:** If your Organization has enabled **Sequenced Groups**, you can take advantage of Sequenced Groups (where your contacts are sent a Notification, in order, until a specified number of contacts has replied). For more information about using Sequenced Groups in Notifications, see Use Sequenced Groups.

2. One by one, select the desired group names (which could be nested). You can search by Group Name or group description as well. The groups are listed in the right-hand panel.

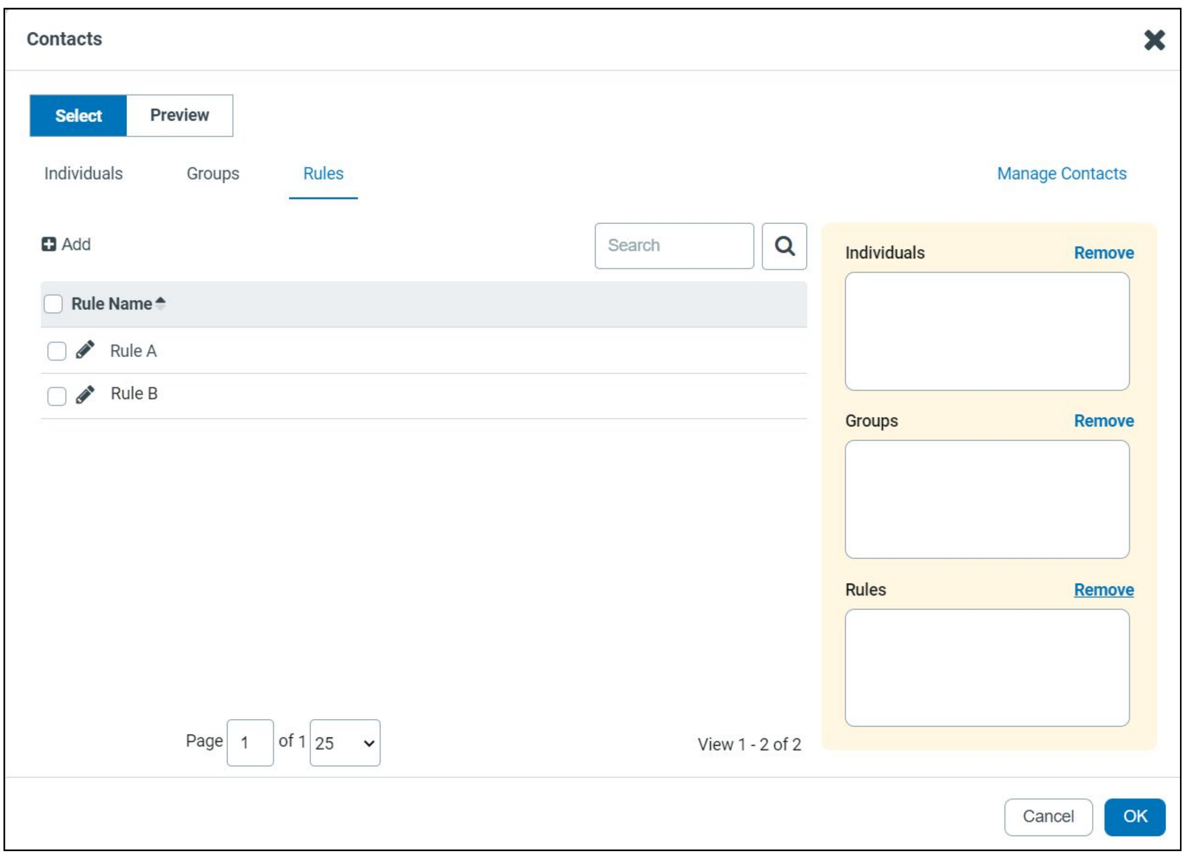


3. After choosing the desired groups, click **OK**. The additions will now be reflected in the **Contacts** modal.



Rules

1. To select Rules, from the **Select Contacts** page, select the **Rules** subtab. (See Create Rules.) The Rules dialog appears from which you can search for your rule or choose multiple rules by selecting the desired check boxes.



2. Select the rules you want to use in this template. The rules are listed in the right-hand panel.

3. After you select contacts, click **OK**. You will see the count for each contact category.

When the group selection includes a Sequenced Group, the following line appears under the selected contacts: **Selections include # Sequenced Group | Sequencing is OFF | Edit**.

- Select the **Edit** link at the end of the display field. From the **Sequencing** field, toggle sequencing ON.
- As needed, change the **Wait Time** (the default is 5 minutes) and set the **Default Responses Needed** for dynamic contacts. In addition, optionally change the **Responses Needed** (the default is 1).
- Under the **Group Name**, you see how the Shift name was added - either manually or via [Rule Name]. See also Understanding How Sequenced Groups Work in Rules.

Use Sequenced Groups

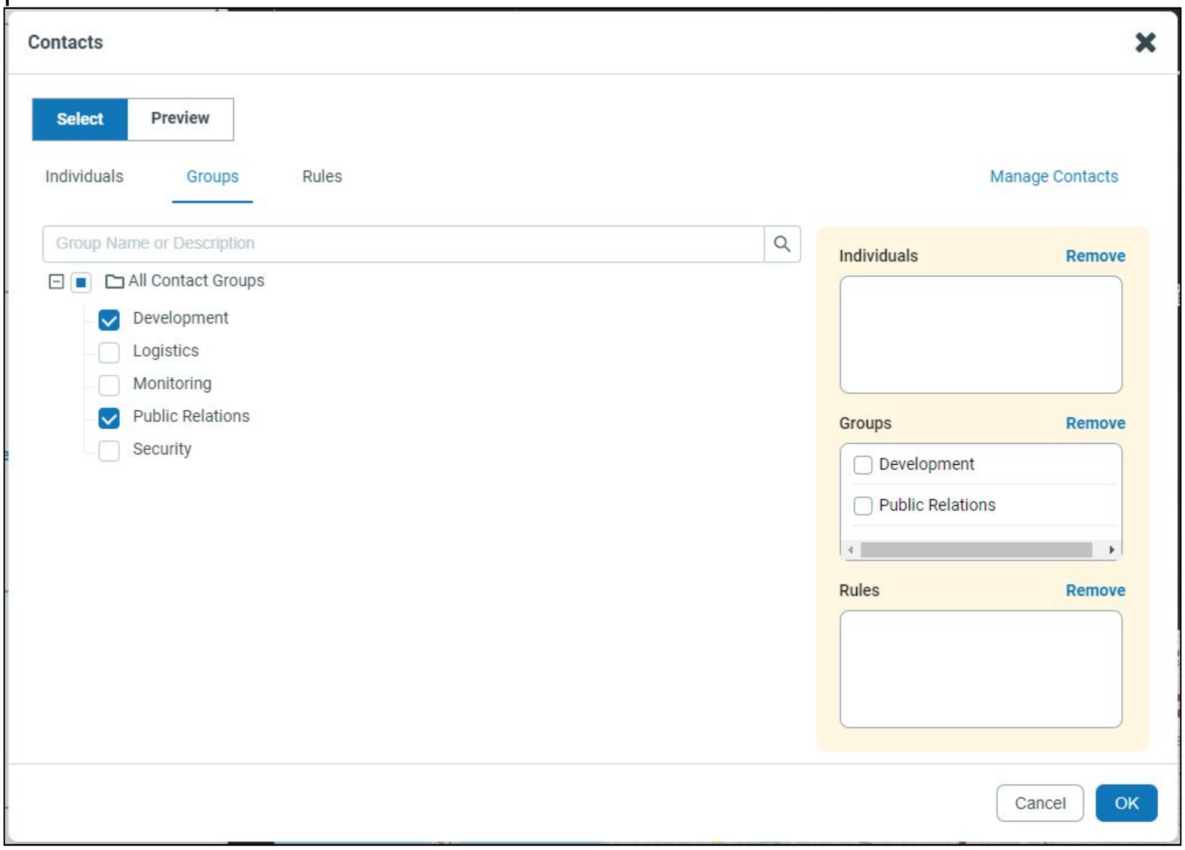
NOTE: If your Organization has enabled Sequenced Groups, your contacts are sent a Notification, in order, until a specified number of contacts has replied.

To use sequenced groups in your Notification:

1. To select groups, from the **Select Contacts** page, select the **Groups** subtab. (To learn about Groups, see Create Groups.) The **Select Groups** page appears. In the following example, only the **Administrators** group is a Sequenced Group.

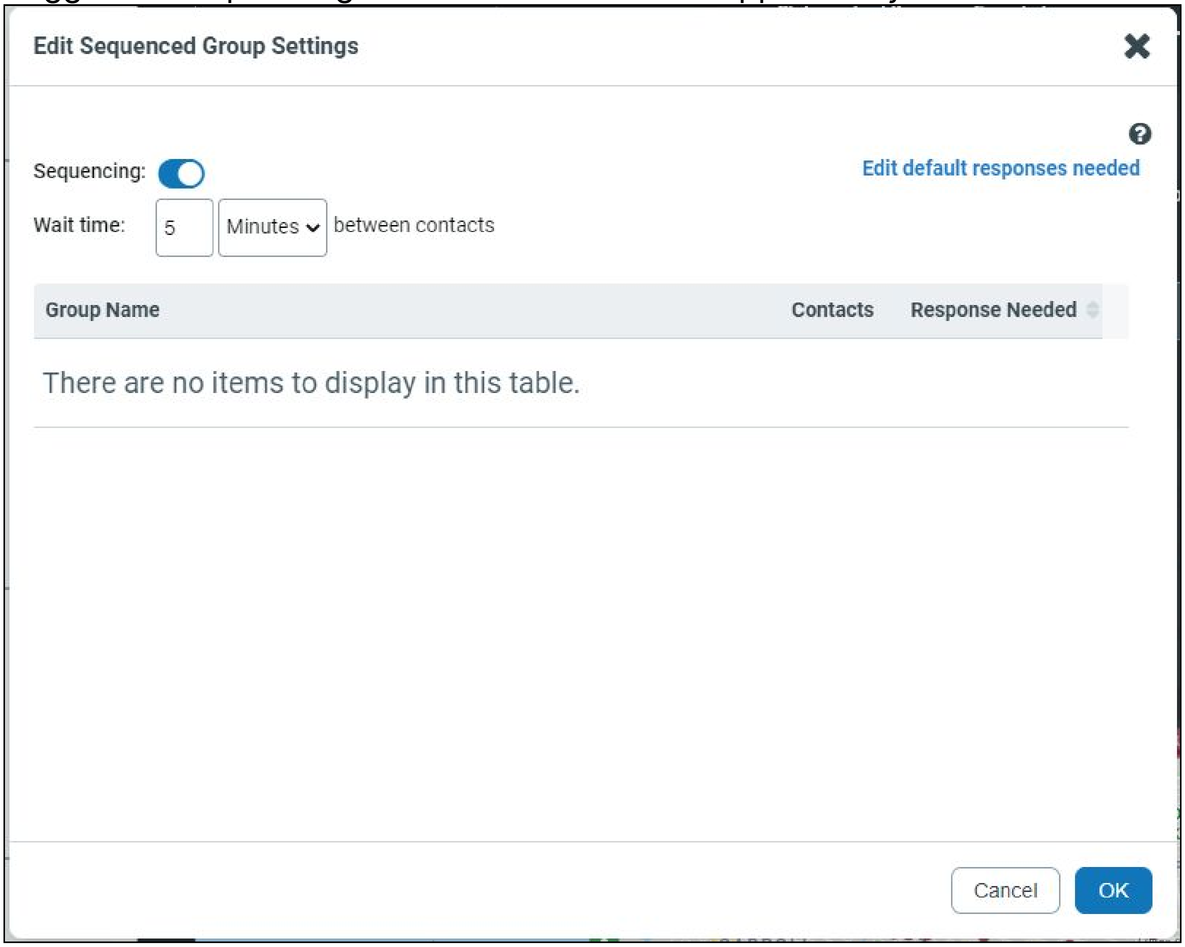
   Sequenced Groups are indicated by the **Sequenced Group** icon (silhouettes and arrow). The order of the contacts in the Sequenced Group is the order in which they will be contacted. If there are two Sequenced Groups, for example, contact #1 from each group is notified in parallel, then after the listed wait time, contact #2 from each group is sent the Notification, and so forth. When the number of replies is met, no other contacts are notified.

2. Select the desired group names (which could be nested). You can search by Group Name or Description as well. The groups are listed in the right-hand panel.



3. Click **OK**. The **Select Contacts** section of the Notification lets you know the number of Sequenced Groups and if Sequencing is OFF/ON. In order to use Sequenced Groups, you must turn ON Sequencing.Click **Edit**. **The Edit Sequenced Group Settings** dialog is displayed.

4. Toggle the Sequencing to ON. Additional fields appear for you to fill in.



Depending on when this Notification is sent, some Sequenced Groups not listed here now may be included. This could be because:

- You are using a Calendar/Shift in a Rule, and the timing results in staff being available later (for example, On Staff = Now);
- A Group has sequencing turned on later. This default value applies to Sequenced Groups not seen here now. For those displayed in the dialog, you can enter a separate value for each.

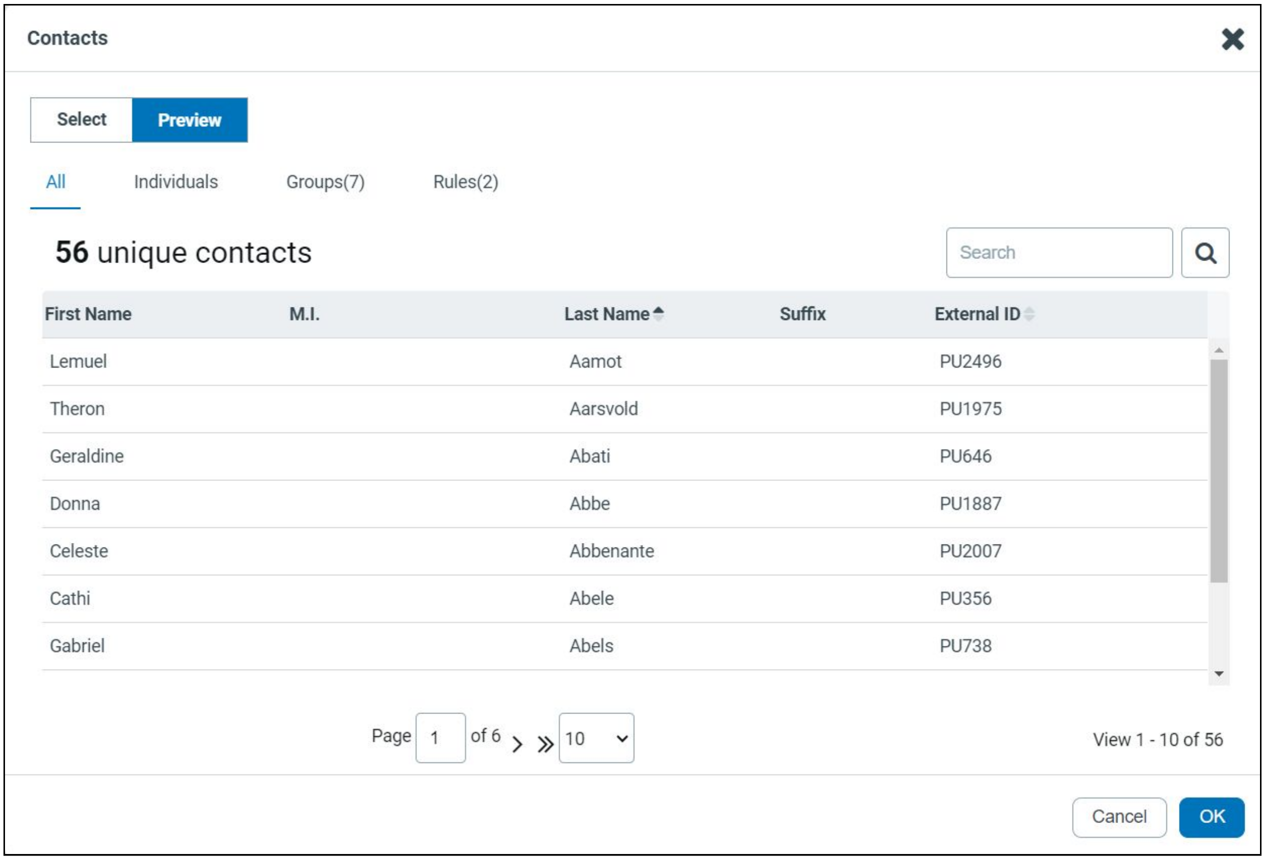
5. In the **Wait Time** field, enter a number in minutes or hours (from the drop-down list) between contacts. (The default wait time is 5 minutes.)
6. In the **Default Responses Needed** field, set this number so that you do not need to change it each time in the template. Setting this number can also be used for groups where Sequencing is turned off, then on again. For example, if you set up a rule that uses the Calendar filter with On Shift set to Now, the contacts returned would be different each time depending on the time of day.
7. In the **Responses Needed** column, enter the number of responses needed before the Notification ends. The default is 1 response.

> **NOTE:** If you are using Notification escalation, the Total Responses Needed include Sequenced Groups. For example, if the **Responses Needed** is 1 from both the **Edit Sequenced Group Settings** dialog and the **Total Responses Needed** in the **Select Contacts** panel, and a contact responds, the Sequenced Group and the Notification Escalation stop sending as soon as a contact from the Sequenced Group responds. If the **Responses Needed** from the **Edit Sequenced Group Settings** dialog is 1 and the **Total Responses Needed** in the Select Contacts panel is 2, and a contact responds, the Sequenced Group stops, but the Notification escalates until it gets the second response.

8. Click **OK**.
9. To select a rule that includes a sequenced group, see Understanding How Sequenced Groups Work in Rules.

Preview Contacts

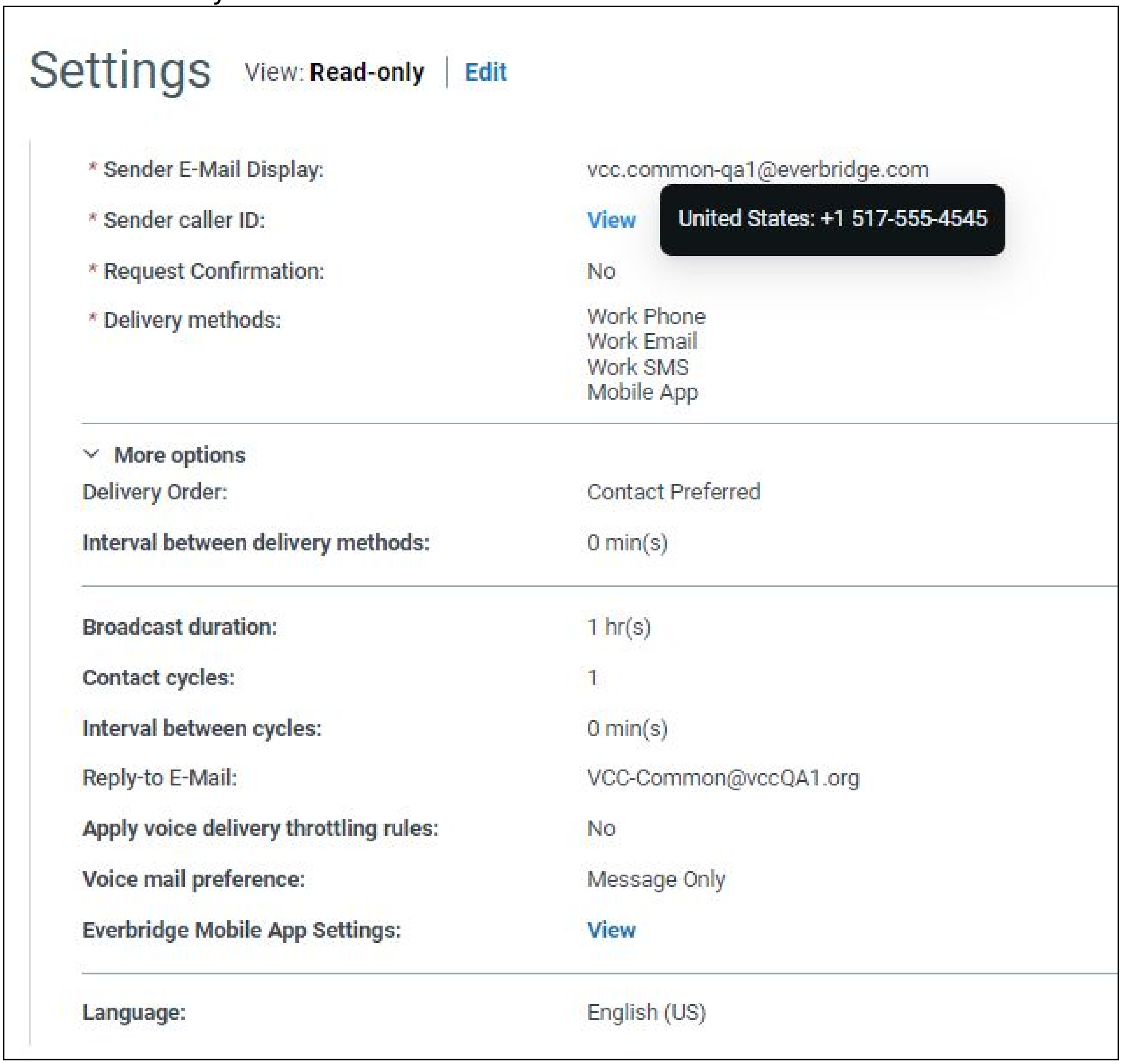
To preview your contacts, click **Preview Contacts.** From the **All** subtab, you will see the names of all the contacts you have selected, whether as Individuals, from a group, a rule, or from the map. When previewing from a group, select the group name from the menu to see the individuals in that group. Or, select **Preview** from each subtab to see the specific contacts you have selected.



Selecting **Preview Contacts** after selecting contacts from the map, you can also select a location: **Static**, **Last Known**, or **Expected**.

Notification Settings

Under the **Settings** heading, you can view your delivery settings. These are the default values set by your Organization Administrators for how the Notification will be delivered to your contacts.



NOTE: Reply to E-mail settings are not supported at the Account level.

Review Notification Settings

By default, the Notification settings are displayed in **Read-only mode.** If a setting has a **View** link, hover the mouse over the link to see the details.

Edit Notification Settings

If your Organization Administrator grants you permission, you can edit the Notification's delivery settings. This allows you to tailor a Notification's delivery settings to the contacts' needs. To edit the Notification settings:

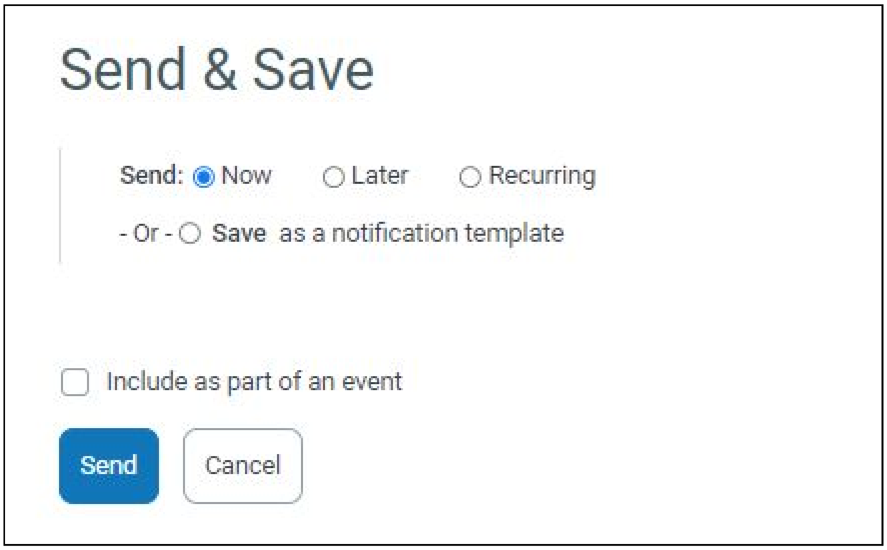
1. Click **Edit**.
2. Scroll to see all the settings.
3. Locate each of the settings that you want to change. As an example, select **Request Confirmation** to give the contacts the ability to confirm receipt of the message.
    - Languages — You can replace English (US) with one of the following languages:

Language	
Arabic	Japanese
Bengali*	Korean
Chinese (Simplified)	Norwegian
Danish	Polish
Dutch	Portuguese (Portugal)
English (UK)	Russian
English (US)	Spanish (Europe)
Finnish	Spanish (Latin America)
French	Swedish
German	Thai
Greek	Urdu*
Haitian Creole	Vietnamese*
Indonesian	Welsh
Italian	Yiddish*

    - Text-to-speech is not supported in the languages marked with an asterisk (*).
4. Click **Read-only** to close the settings.

Send, Schedule, or Save Notifications

In the **Send & Save** section, you can decide when and how often to send the Notification. You can also decide to save it as a template for later use.



NOTE: Account Administrators **cannot** schedule or add a recurring Notification at the Account level. This capability is only available at the Organization level.

Options for sending a Notification include:

- **Now** - Send the Notification immediately.
- **Later** - Schedule the Notification to launch automatically at a specific date and time.
- **Recurring** - Configure a recurring schedule for the Notification to be sent.
- **Save** - Save the Notification as a template.

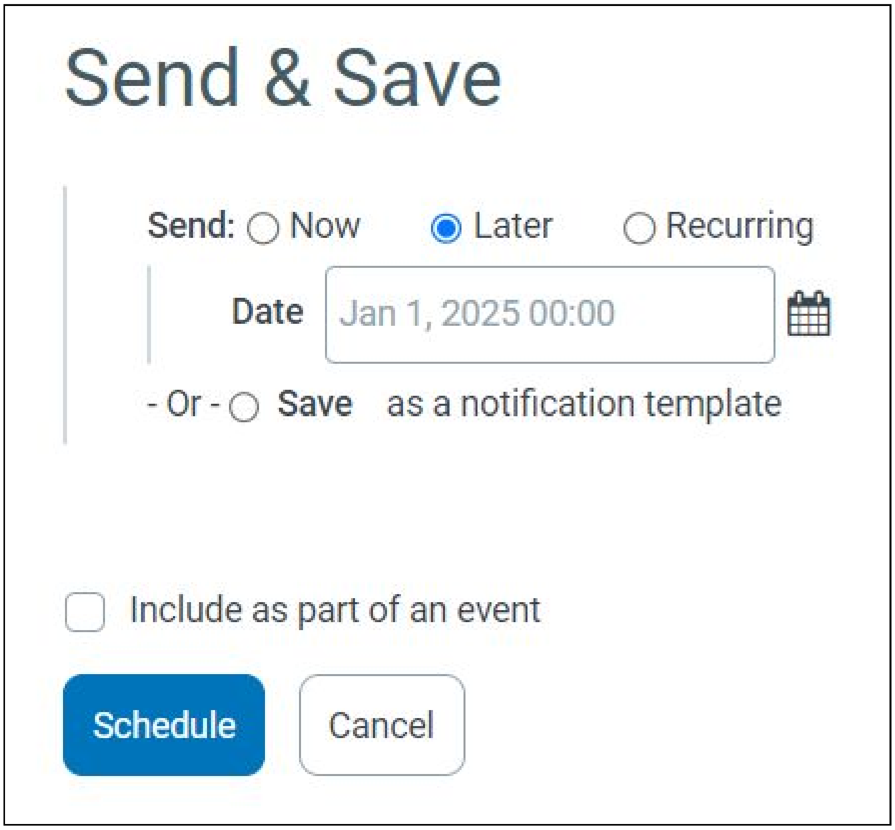
By selecting the **Include as part of an event** checkbox, you can add this Notification to an event. If you associate the Notification with an event, then you can view the event and see the history of the Notifications, all in one place. Select an existing event from the menu, or create a new event by typing a new event name into the text field. See Events.

Scheduling a Notification

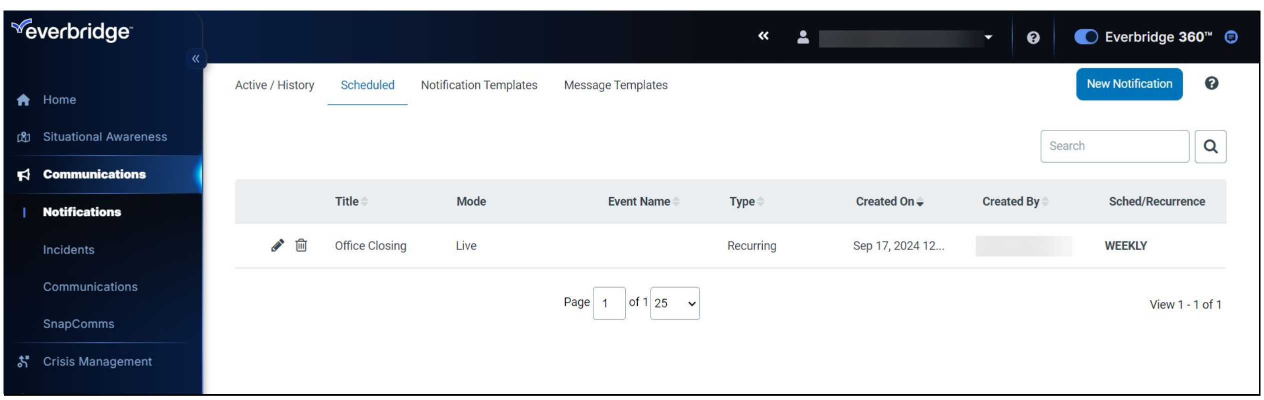
To schedule a Notification:

1. Once the rest of the Notification information has been filled in, scroll down to the **Send & Save** section at the bottom of the page.

2. For **Send**, select **Later**.
3. Choose the date and time that the Notification will be launched.
4. Click **Schedule**.



Once scheduled, the Notification will appear in the Scheduled tab of the Notifications section (**Communications** > **Notifications** > **Scheduled**).



Recurring Notification

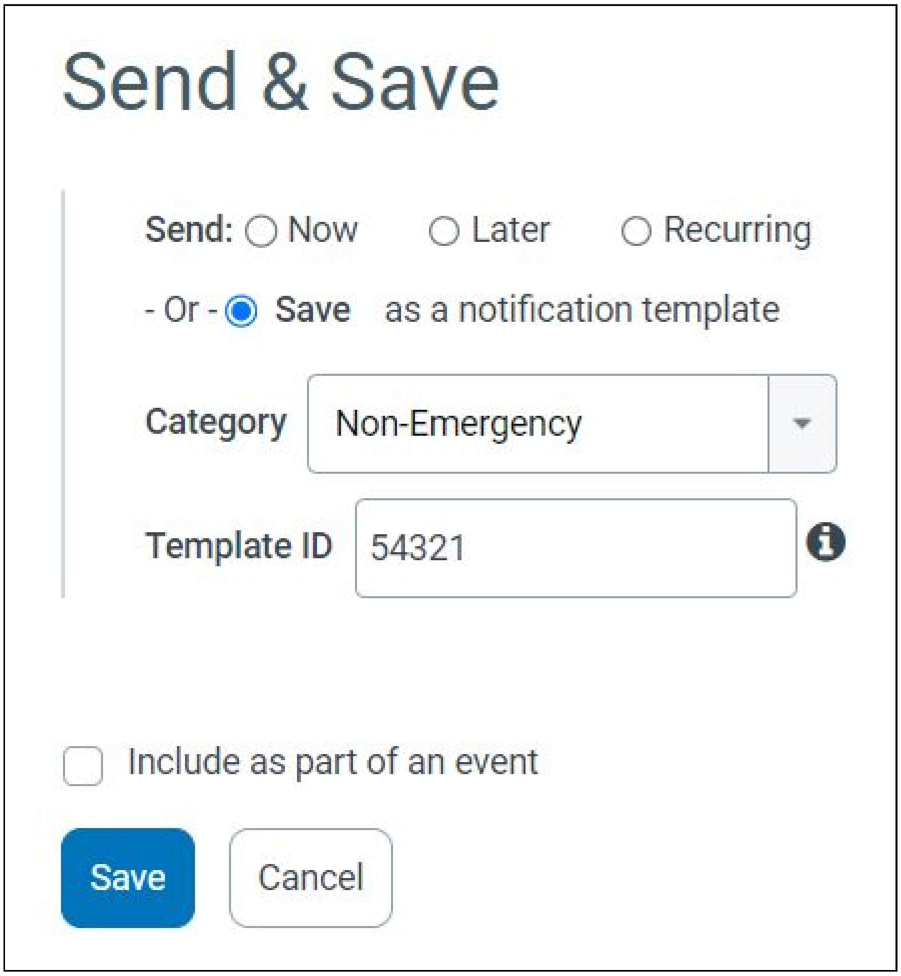
To schedule a recurring Notification:

1. Once the rest of the Notification information has been filled in, scroll down to the Send & Save section at the bottom of the page.
2. For **Send**, select **Recurring**.

3. Specify the recurring cadence by making the following selections:
    - **Repeats** - Daily, weekly, monthly, or yearly.
    - **Every** - Intervals (based on the Repeats selection).
    - **On** - The specific date or day of the week this Notification should be repeated.
    - **Time Zone**
    - **Start Date** - The date that the recurring schedule starts.
    - **End Date** - The date that the recurring schedule ends.
    - **Send Time** - The time at which the recurring Notification will be sent.

Save Notification as a Template

Notifications can be saved as a template ready to be used as needed.

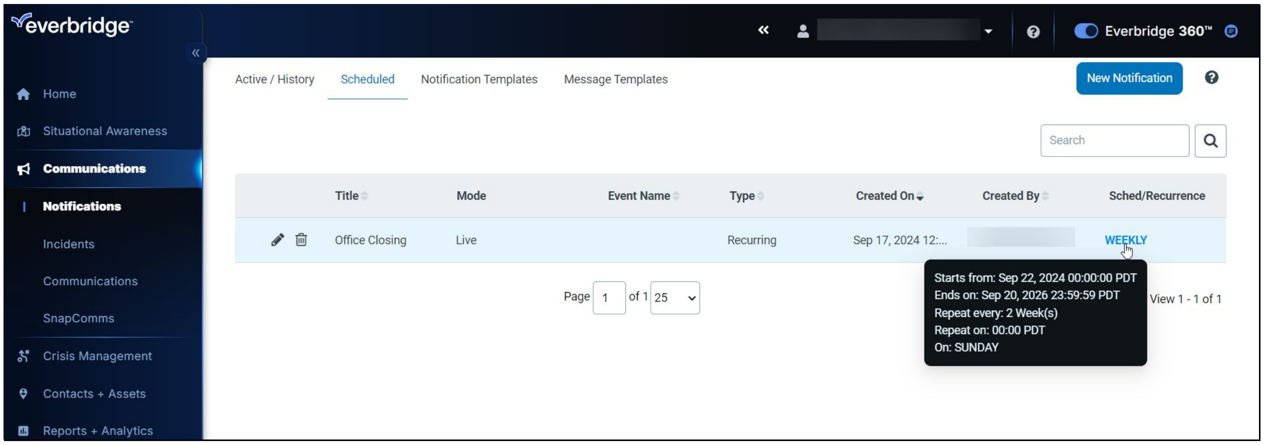


- It can be saved in a Category to make it easier to find when needed. Select one of your previous category names from the **Category** menu or type a new category name directly into the text field.
- Additionally, the Notification Template can be given a Template ID. This allows you to launch your Notification by phone when you lack Internet

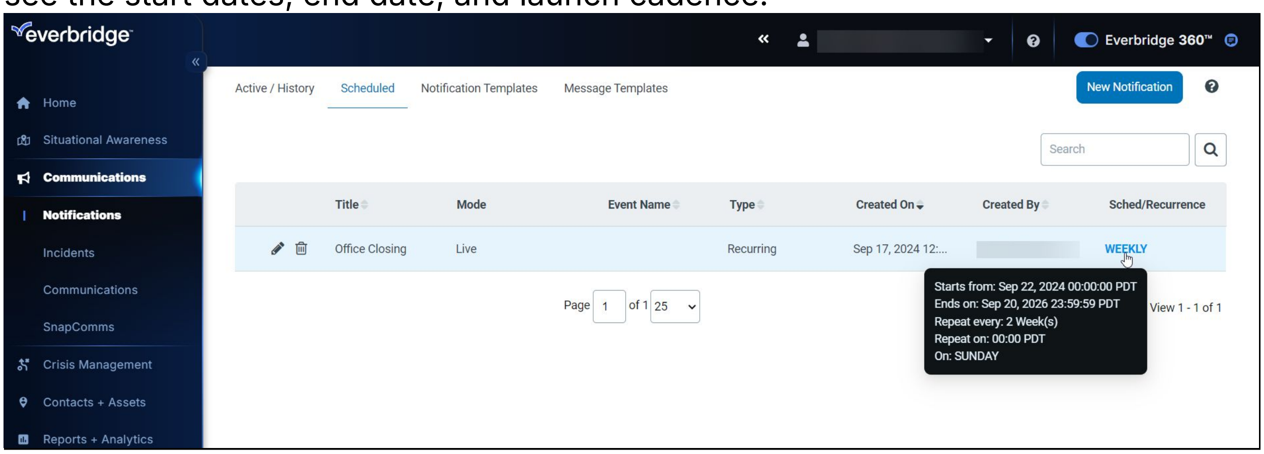
access. To do this, type up to 20 characters in the **Template ID** text field. You can only use numbers, and they must be greater than zero.

Scheduled Notifications Tab

The **Scheduled** subtab contains Notifications that have been predefined and pre-filled while planning for emergencies and other events in advance, as well as Notifications that will be sent out on a recurring schedule. For more on scheduling a single or recurring Notification, see Send, Schedule, or Save Notifications.



Under **Sched/Recurrence**, for scheduled Notifications, you can see the date and time of scheduled Notifications. For recurring Notifications, hover the mouse to see the start dates, end date, and launch cadence.

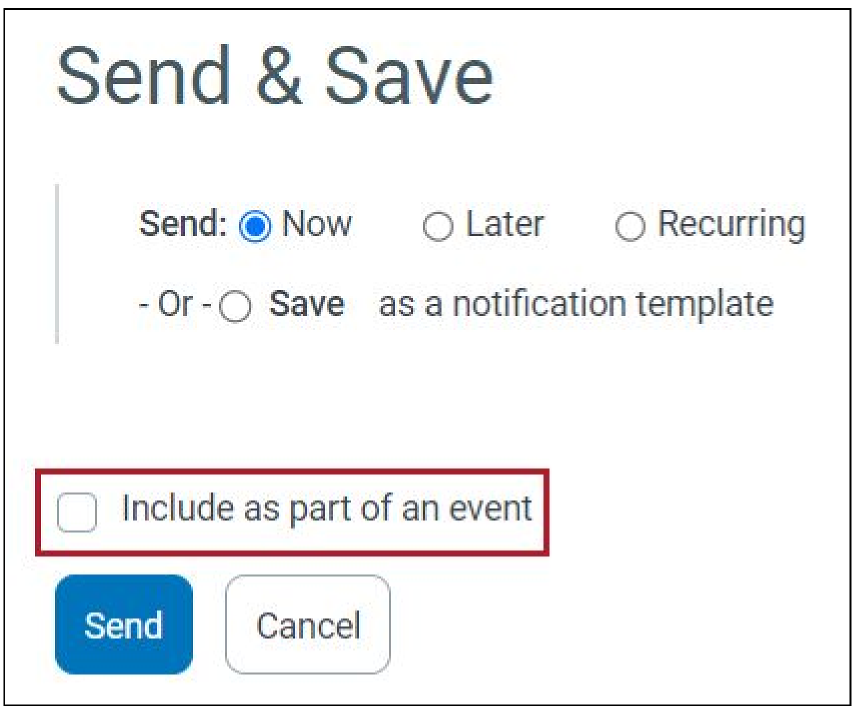


Notification Events

There may be several Notifications launched as the result of a single event. For example, a storm may require warning notices and specific evacuation or preparation Notifications. A chemical spill might require an evacuation message, a Notification to Hazardous Materials responders, a status update, and an all-clear message. By using an event name, you can group the Notifications for the same event in your Organization.

When Notifications are assigned to an event, it makes it possible to track multiple Notifications that were all part of the same event or Incident, follow the progression over time, and analyze the results of an event in a single report.

To add a Notification to an event, while you are configuring the Notification, select the **Include as part of an event** check box at the bottom of the **Add Notification** or **Edit Notification** page, then either select a previously used event name from the menu or type a new event name in the text box.



To add a Notification to an event, click **Yes, send Notification(s) under the event name** in the **Include as part of an event** dialogue. Then, select a previously used event name from the menu.

From the **Active/History** subtab, you can see the Notifications that are part of a specific event. Click the Event Name from the **Active/History** subtab to launch the Event Analysis page.

To view an event report, see Event Analysis.

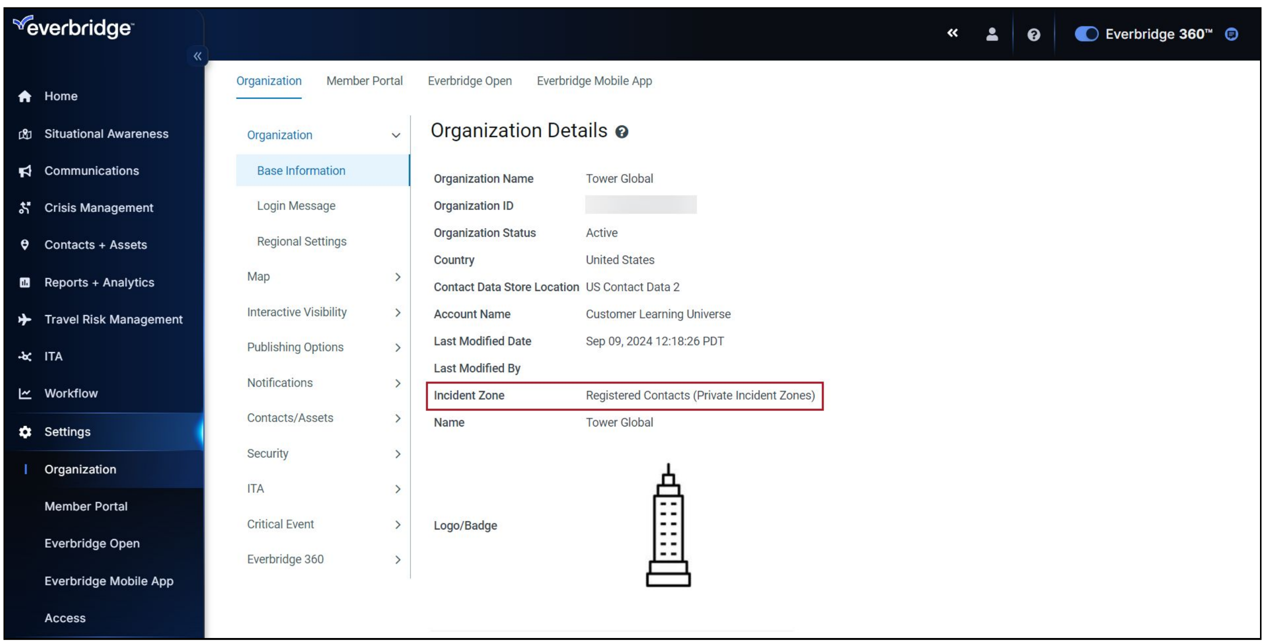
Incident Zones

If available to your Organization, the Administrator (for example, Account Administrator, Organization Administrator, and Incident Administrator) roles can configure a Notification to manage an Incident Zone.

There are two types of Incident Zones:

- **Anonymous Contacts (Public Incident Zone)** - Public Incident Zones are used by State and Local Governments, where the end-user locations are anonymous.
- **Registered Contacts (Private Incident Zone)** - Private Incident Zones, a Safety Connection feature, are used to see which employees are in an impact area and message them.

You can see which Incident Zone is enabled for your Organization from **Settings** > **Organization** > **Base Information**.



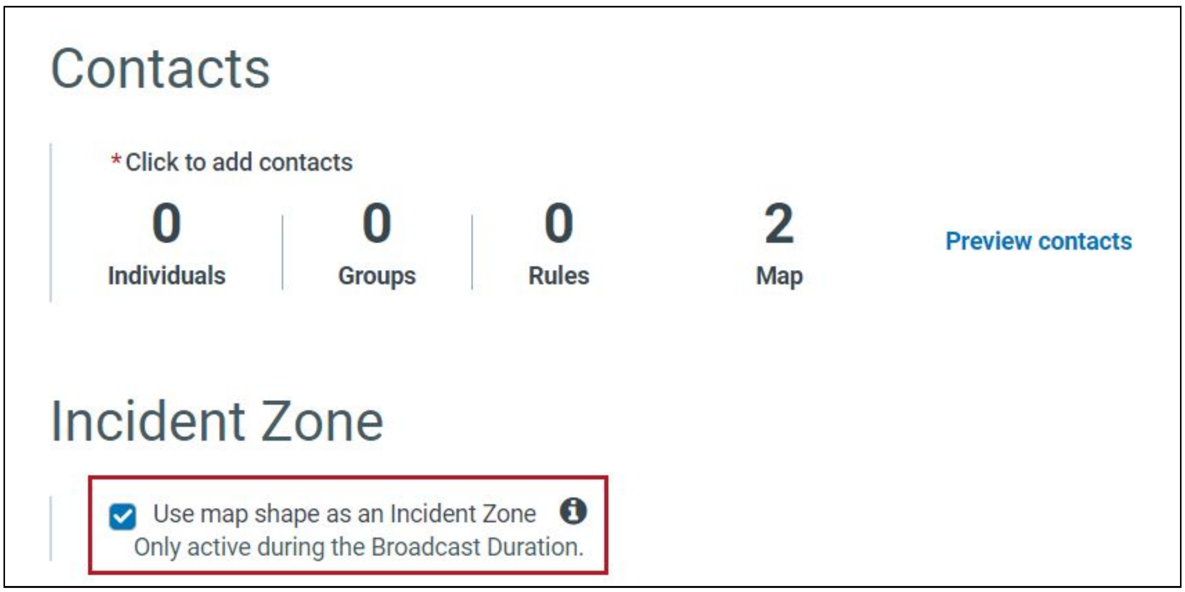
To add an Incident Zone to your Notification or template:

1. If available to your Organization, map your Incident Zone by placing at least one polygon on the map. Public Incident Zones are used by State and Local Governments, where the end-user locations are anonymous. Private Incident Zones, a Safety Connection feature, are used to see which employees are in an impact area and message them. For a Public Incident Zone, the Mobile Push Alert delivery method must be enabled in the Organization as well; for a Private Incident Zone, the Mobile Push Alert is not required to be enabled.

- **Geo-target** - When you have a polygon on the map, and the Everbridge Mobile App Location Services = ON (on the recipients' cell phones), the recipients will get push Notifications.
- **Geo-fencing** - All geo-contacts who are in, or enter, the area defined by your polygon(s) will receive this message. For Public Incident Zones, Everbridge is added as a Delivery Method and the Contact Cycles are set to 1; for Private Incident Zones, the Contact Cycles can be set to more than 1.

> **NOTE:** Only the **Standard** message type can be used in an Incident Zone. **Polling** or **Conference Bridge** message types cannot use the Incident Zone feature.

2. From the **Incident Zone** pane, select the checkbox: Use shapes on the map as a geofence. The **Incident Zone** is active only during the broadcast duration.



3. Review the following Incident Zone notes:
   - Any rebroadcasts will not be sent to Everbridge Mobile contacts if **Incident Zone** is selected in the original message as a result of their entry into the geofenced Incident Zone area.
   - If the Notification is scheduled with Incident Zone, and Send Follow-Up is initiated, you must redraw the polygon and disable the contact layers if you want to send to Everbridge Mobile contacts only. Users can change the existing message and settings. It is considered a new Notification message and all Everbridge Mobile users will receive the new message.
   - For Private Incident Zones, mobile is not the only path to determine the location or receive the alert.

- If the Notification is scheduled with Incident Zone, stopping the Notification cancels the **Incident Zone** broadcast.
- If you select the **Use shapes on map as a geofence** checkbox, then you send or save the Notification, a **Confirm** dialog is displayed. The message in the Incident Zone Confirmation dialog differs depending if you have a public or private Incident Zone. Click **Yes** to confirm the location and position of your shape.

Unsubscribe and Resubscribe Options

Your Notification recipients can opt out of receiving messages from your Organization. Everbridge unsubscribes by path value and Organization, not by contact, which means you must opt out of each delivery path separately.

- Unsubscribing via SMS does not affect the voice or email delivery paths.
- Unsubscribing via voice does not affect the SMS or email delivery paths.
- Unsubscribing via email does not affect the SMS or voice delivery paths.

SMS Unsubscribe and Resubscribe

When recipients of an Everbridge SMS Notification want to opt out of receiving SMS messages from your Organization, they can each send a keyword to an Everbridge SMS code.

To unsubscribe via SMS:

1. A recipient sends an SMS message containing one of the following keywords (in US English and spelled exactly as shown here):
   a. STOP
   b. END
   c. UNSUBSCRIBE
   d. QUIT
   e. CANCEL
   f. STOP ALL
2. Depending on the country and carrier used, your contacts might receive an auto-response informing them they have opted out and will not receive further messages from Everbridge Alerts. Not receiving an auto-response is not an indication of the unsubscribe process not working; your contacts are opted out even if they do not receive a return confirmation message.
3. If Everbridge Suite finds any of the keywords as the first word in the reply (from left to right), the system adds the phone number to the Everbridge unsubscribe list for your Organization.

> **NOTE:** The system treats a response as an unsubscribe request if someone replies with “Stopping at the data center on the way back to the office.” This is because the word “Stop” is in the first four positions of the SMS message received by Everbridge Suite. Avoid starting any response with the word “stop...” if they are not opting out. Also, Everbridge Suite treats a response as a request to unsubscribe if “stop” is preceded by blank spaces, for example “ stop” as long as the blank spaces are at the very beginning of the response. Everbridge

Suite does not treat a response such as "I am going to stop at home before heading to the airport" as a request to unsubscribe because "stop" is not the first four characters of the message (reading from left to right).

4. The Administrator sends a subsequent Notification via SMS and Email, for example, to the same contact who has opted out. Everbridge Suite blocks the SMS message to the contact. However, the Email message is sent to the contact. The Administrator can view the call results for the contact under Notification History. The call result displays as "Not Attempted - Unsubscribed" for the SMS attempt on the Notification report.

   NOTE: If the Administrator sends the Notification only via SMS, then the contact in the above example is aggregated under the UNREACHABLE category in the Notification Details. However, if other delivery methods were used for the Notification to the contact, they are listed under the appropriate confirmation status category.

5. The Administrator can view a list of all contacts who have requested to be opted out of SMS Notifications by selecting **Reports > Quick Reports > Unsubscribe Requests**.
6. Click **Download CSV**, and open the link after receiving the email for the CSV report.

Unsubscribe from all Organizations via SMS

Using STOP ALL allows recipients of Everbridge SMS Notifications to send a response to opt-out of receiving any SMS messages from all Organizations within Everbridge Suite. For example, a contact might receive Notifications from the Administrator and might also be opted into another Organization that uses Everbridge.

The recipient who sends STOP ALL (not case-sensitive) will not receive any SMS messages from Everbridge Suite and is listed on the Notification History page and Unsubscribe Requests quick report.

The STOP ALL keyword also blocks messages to contacts who have not received any SMS messages from Everbridge.

NOTE: Using STOP ALL unsubscribes the given phone number from all Organizations regardless which Organization, if any, sent out a Notification recently to the given phone number. Even if the phone number does not belong to any Organization in Everbridge Suite, STOP ALL adds the given phone number to the unsubscribe list. This means that in the future, if that phone number is added to an Organization's contact record for an SMS delivery path, then that contact will not receive any SMS messages until he or she re-subscribes.

STOP can also have similar effects as STOP ALL. If a contact receives an SMS from Everbridge and decides to unsubscribe, then that contact has up to 10 days from the date of the Notification's sent date to send a STOP request. If the STOP request is received during this time, then the STOP applies solely to the Organization that sent the last Notification to that contact. However, if the STOP is received after 10 days of any Notifications having been sent to that phone number, then Everbridge categorizes the STOP as a STOP ALL and the given phone number is unsubscribed from all Organizations.

- If two contacts are in the same Organization with the same phone number, and Contact 1 unsubscribes, regardless of using STOP or STOP ALL, then neither contact receives an SMS message.
- If two contacts are in different Organizations with the same phone number, and Contact 1 unsubscribes:
    - when using STOP within 10 days from when the Notification was sent, then Contact 2 in the other Organization receives the Notification SMS message, but Contact 1 does not.
    - when using STOP ALL, then neither contact receives a Notification SMS message. STOP ALL is a blanket unsubscribe regardless of Organization.

Resubscribe via SMS

To resubscribe via SMS:

1. Send an SMS message with the word `RESUME` to any of Everbridge's SMS codes (see here.) The phone number is removed from the Unsubscribed list.
2. `RESUME` applies to all unsubscribed Organizations. There is no option to specify an Organization.

Voice Unsubscribe and Resubscribe

See **Organization Settings > Notifications > Delivery Methods > Allow unsubscribe from**, and ensure the **Phone** check box is selected. Select this check box to play the unsubscribe prompt at the end of all voice Notifications using the Phone [X] delivery paths.

Your recipient receives a phone call. After the message playback completes, the recipient can press 0 (zero) to unsubscribe.

To unsubscribe from a Voice Notification:

1. Your recipient presses 0 (zero) to unsubscribe from future Notifications.
2. Your recipient confirms the process.
3. To view a list of all contacts who have opted out of voice Notifications, select **Reports** > **Quick Reports** > **Unsubscribe Requests**.
4. Click **Download CSV** and open the link after receiving the email for the CSV report. The act of unsubscribing unsubscribes the given phone number from all of the Phone [X] delivery paths in your Organization. However, it does not affect SMS, email, or any other delivery path.

To resubscribe to Voice Notifications:

1. Contact the Everbridge Voice Resubscribe phone number.
2. Go through the resubscribe process as directed.

The resubscribe menu is available only in US English. There are no options to select which Organizations to which to resubscribe.

The resubscribe mechanism detects the caller's Caller ID and only allows resubscribing that particular number. This is for privacy reasons to ensure that only the individual who owns a given number can resubscribe that number.

The act of resubscribing resubscribes the contact to all of the Phone [X] delivery paths. However, it does not affect SMS, email, or any other delivery path.

Email Unsubscribe and Resubscribe

See **Organization Settings > Notifications > Delivery Methods > Allow unsubscribe from**, and ensure the Email check box is selected. Select this checkbox to display the default unsubscribe text at the bottom of all email Notifications using the Email [X] delivery path. See Email - Header & Footer for details about Default and Custom Unsubscribe.

The unsubscribe is only applied to Email [X] delivery paths; not to the Plain Text Email 1 Way or Plain Text 2 Way delivery paths.

The system-generated unsubscribe verbiage is language-specific based on the Notification's language.

Your recipient receives an email. The **System unsubscribe** (default or custom) link at the bottom of the email.

Unsubscribe

To unsubscribe from an Email Notification:

1. Your recipient clicks the link at the bottom of the email. The link leads to an unsubscribe page unique for the contact and Organization combination. The dialog is in the language of the Notification.
2. Your recipient selects the **I'm not a robot** check box.
3. Your recipient clicks **Yes, Unsubscribe**. A confirmation message is displayed.
4. To view a list of all contacts who have opted out of email Notifications, select **Reports > Quick Reports > Unsubscribe Requests**.
5. Click **Download CSV** and open the link after receiving the email for the CSV report.

The act of unsubscribing unsubscribes the given email address from all of the Email [X] delivery paths in your Organization. However, it does not affect SMS, voice, or any other delivery path.

Resubscribe

To resubscribe to Email Notifications:

1. The contact goes to the **Everbridge Email Resubscribe** page.
2. Type the email address to resubscribe. (There is no email validation for ownership.) There are no options to select which Organizations to which to resubscribe; it applies to all unsubscribed Organizations. For security reasons, the names of Organizations are not displayed. If the user is not unsubscribed from any Organization, then the “You are not unsubscribed from any Organization” message displays with no **Subscribe** button.
3. Select the **I’m not a robot** check box.
4. Click **Check Address**.
5. Click **Subscribe**. The act of resubscribing resubscribes the contact to all of the Email [X] delivery paths. However, it does not affect SMS, voice, or any other delivery path.

Create Message Templates

When sending a Notification, you must provide the message or body of text. You can select from existing messages, type the text of the message, or upload a voice recording from your desktop. Any method gets your message to your contacts, but it is a best practice to use existing messages.

You must be logged in as the role you want to have access to specific message templates. For example, as an Account Administrator, when you create a message template, it is only accessible to other Account Administrators, and not to any other roles. Everbridge recommends you create separate user roles where you give yourselves access to the roles for which you are building message templates. This way, you build your message templates and the other users and roles can see these templates.

Tailoring Your Message Body

Whenever possible, plan and record the message in advance, while you are not under stress to send the Notification. This allows you to provide a higher-quality message.

Create a customized distinct message for each device to which you will send the message. Include the following four items:

1. Source
2. Event
3. Action to take
4. Where to find details

To make sure that your SMS text message is passed through the carrier without error, keep the following guidelines in mind when typing the message:

- Only use characters that you find on a standard keyboard.
- Do not paste text from a word processing application or a web page that may add special formatting characters, even if they are invisible.

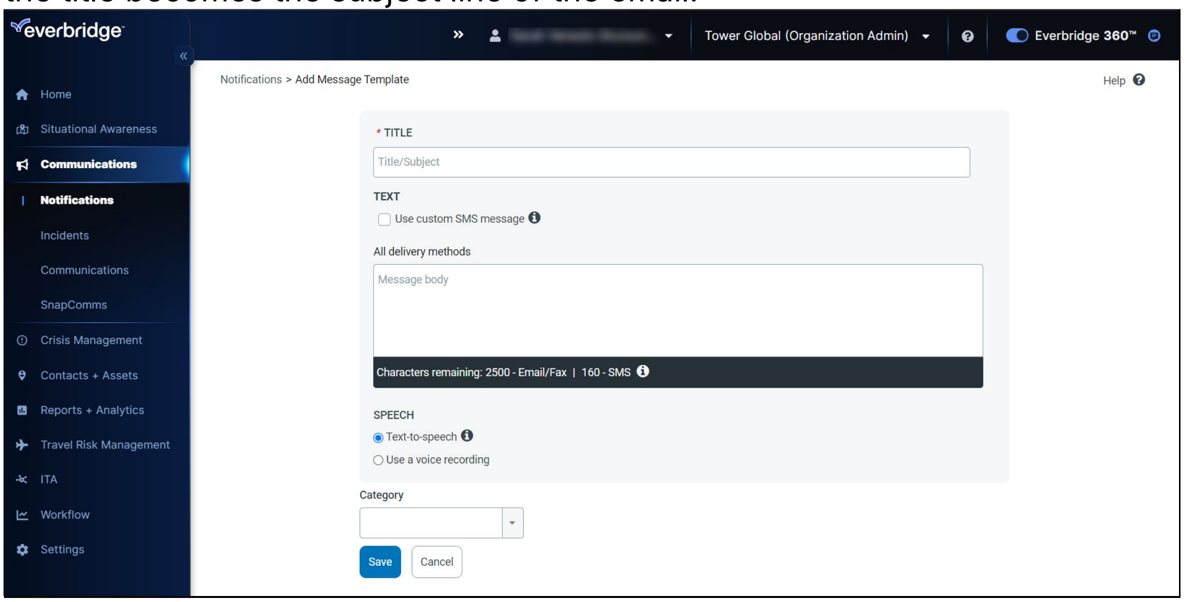
Avoid special characters, such as an ampersand (&) or percent sign (%).

- If you use the message in a Notification that includes voice devices, but do not include a voice recording, the system can use text-to-speech to add the voice message. Make sure that the text you entered can be properly converted by the text-to-speech engine. That is, be careful of abbreviations, acronyms, and words that may not be clear. If you are adding this message in advance, send a test Notification to yourself to make sure the output is clear.

> **TIP:** For further details about text-to-speech, contact your Everbridge implementation representative.

To add a new text message template:

1. From the **Message Templates** subtab, click **New Message Template**. The Add Message Template page appears.
2. Type a title for this message. If this message is sent by email, fax, or SMS, the title becomes the subject line of the email.



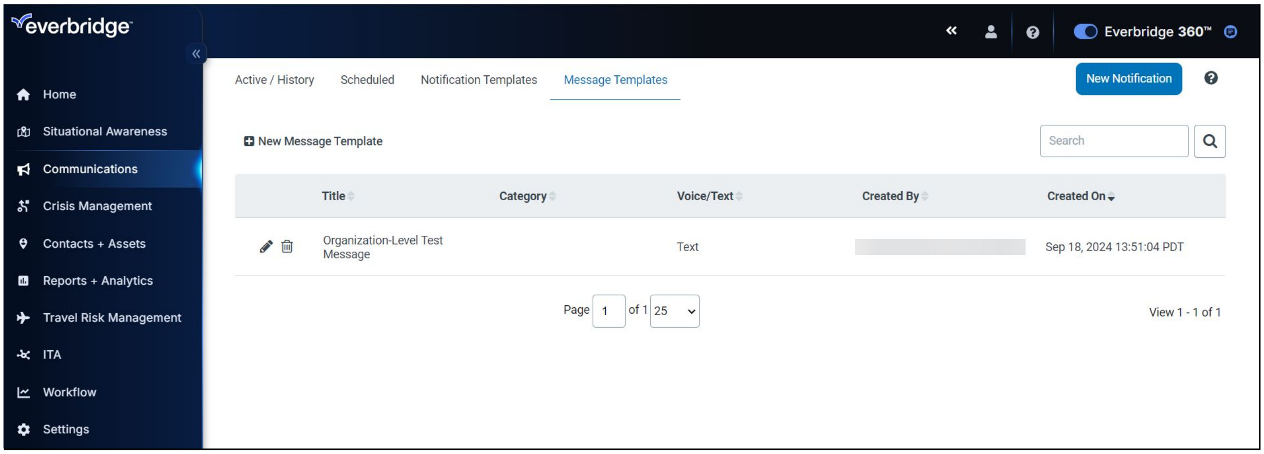
3. Type the Body of the message.
    a. For **SMS**, keeping under 100 characters
        i. **Source:** Short Sender Name
        ii. **Call to Action:** "Shelter in Place, Avoid X area"
        iii. **Hazard Description:** Reference where to find additional details
    b. For **Email** and **Everbridge Mobile App**, resulting in separate email and Everbridge Mobile App messages
        i. **Source:** Custom branding and name
        ii. **Call to Action:** "Shelter in Place, Avoid X area"
        iii. **Hazard Description:** Reference where to find additional details
        iv. **Additional Details:** With links or Rich Text Formatting
        v. **Attach Resources**
    c. For **Phone Calls**, where the message is between 30-40 seconds, but no more than 1 minute.
        i. **Source:** Actual human voice whenever possible
        ii. **Call to Action:** "Shelter in Place, Avoid X area"
        iii. **Hazard Description:** Reference where to find additional details
4. Under **Speech**, select:

   a. **Text-to-Speech**: When you send this message to a text path like email or SMS, this is the message text that is sent. If you send this message to a voice path like a phone, a text-to-speech engine reads this message to the contact.
   b. **Use a Voice Recording**: For voice recordings, make sure the file you want to upload matches the technical specifications for a file. (See the specifications on-page.) Everbridge uses the following file format for delivering the audio message: 8K Hz 8 bit mono mu-Law, or uncompressed PCM WAV. Everbridge can also convert the following file formats:
      i. –8K Hz 8 bit PCM
      ii. –8K Hz 16 bit PCM
      iii. –8K Hz 4 bit ADPCM
      iv. –8K Hz GSM 06.10
      v. –8K Hz mu-Law
      vi. –11K Hz 8 bit PCM
      vii. –11K Hz 16 bit PCM
      viii. –11K Hz 4 bit ADPCM
      ix. –11K Hz GSM 06.10
      x. –11k Hz mu-Law
5. Optionally, assign the message template to a **Category** to make it quicker to find in the list. Select from the drop-down list or type the Category name directly in the text box.
6. Click **Save**. The template is on the **Message Templates** list and ready to be used in a Notification as a Text message.

NOTE: At the Account level, the Account Administrator sees only the messages saved in the Account level.

Maintaining Your Message Templates

From the **Message Templates** subtab, you can search using the Message Template name or Category name. To clear the search, delete the search term, and click **Search** again.



You can sort the list by any of the columns. Click a column heading on which to sort.

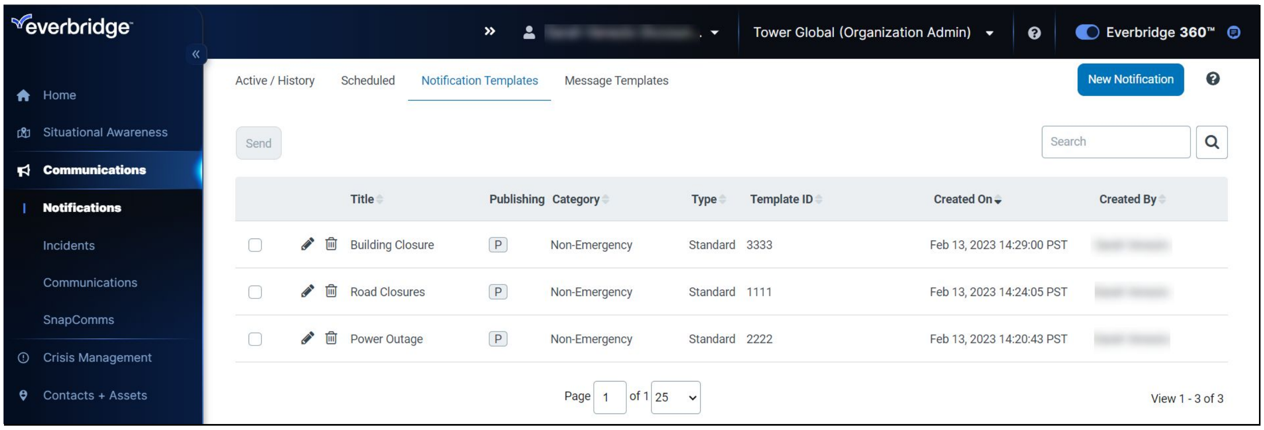
Use the Page Controls at the bottom of the page to view the records. Use the drop-down list to set the number of records to display on each page. Step through the pages using the page controls (First Page, Previous Page, Next Page, Last Page).

To edit a message template, select the **Pencil** icon in its row. Make your changes to the template, then click **Save**.

To remove a message template from the list, select the Trash Bin in its row. Confirm the deletion.

Use Notification Templates

The **Notification Templates** subtab contains the Notifications that you predefined and pre-filled while planning for emergencies and other events ahead of time. From this list, you can select the template to which to add additional information before sending or the template that is already predefined and ready to be sent immediately.



Once you have configured a Notification, you can save it as a template, including the:

- Message
- Contacts who are to receive the message
- Settings for the Notification

From the **Notification Templates** subtab, you can launch a new Notification and see your Organization’s Notification templates. You can also add a new Notification template from this page. An Organization can have an unlimited number of Notification templates.

The fields on the Notification Templates subtab are described in the following table:

Field or Area	Description
Search	Use a string that is from the Name column. This search feature uses the “contains” condition. For example, to find all templates with the name “Office”, you could type the full word or the partial word, `office` or `off`. When you click the Search (magnifying glass) icon, the application finds all templates whose names include “Office” or “off”.
Check box	To select an individual template.

Pencil icon	Click the Pencil icon in the row of the template to edit. The Edit Notification Template appears. The fields are pre-filled and you need only modify the necessary fields.
Delete	Click the Trash Bin in the row of the template to delete. Use this button to permanently remove the selected template from your Notification Templates subtab.
Title	The name of the template as your operators will see it in their list of Notifications. If the Notification is a high-priority Notification, a red exclamation icon precedes the title. If an Information triangle precedes the Title, the user role under which this template was created has been deleted. Click to open this template, then Save to update the role and Send.
Publishing	If you used a Publishing Option, a “P” icon appears in the row of the Notification. Hover your mouse over the “P” to see which publishing option: Everbridge Web Widget, Everbridge Desktop Alerts, Everbridge Network, Alertus, Web Posting, Social Media, Nixle Community Subscribers, Nixle Event Subscriptions, CAP Channels, Member Portal, Google Public Alerts, or Audio Bulletin Board.
Category	Displays the name of the category or folder to which you assigned your template. You are not required to place a template in a category. If there is more than one category already in your library, click the Down arrow to either add your template to a category or change the category for the template. If you select a different category, your template is moved. If you no longer want your template in a category, select “No Category”.
Type	The message type: Standard, Polling, or Conference Bridge. You can change the Smart Conference Bridge number on escalated templates, but not the conference bridge type.
Template ID	The template ID (maximum of 20 digits) assigned to this Notification template.
Created On	The timestamp when the Notification template was added.
Created By	The full name of the person who added the template.

From the **Notification Templates** subtab, you can view or edit an existing template by selecting the **Pencil** icon in the row of the desired template. Optionally, include the Notification as part of an event, then click **Send**.

Whose Permissions are Used When Sending a Notification Template?

A. If the user selects the Notification template from the list on the Notification Templates page and clicks **SEND** at the top of the page, then the application uses the permissions scope of the authoring role.
B. If the user opens the Notification template and clicks **SEND** at the bottom of the form, then the application uses the permissions scope for the user's role.

Examples:

Suppose a Dispatcher is assigned a group containing 10 staff contacts whose first name is "Melanie". The Organization has 100 staff contacts. The user in the Dispatcher role creates (authors) a Notification Template with a Rule to select contacts whose Record Type is "Staff".

Scenario A: A user sends the Notification Template from the **Notification Templates** list by selecting the template and clicking **SEND** from the top of the page.

1. When the user in the Dispatcher role sends the Notification Template, the 10 contacts assigned to the Dispatcher role are selected for the Notification.
2. When the user in the Organization Administrator role sends the same Notification Template, the Notification will be sent to the same 10 contacts.

Scenario B: A user sends the Notification Template by editing the template and clicking SEND at the bottom of the Notification form.

1. When the user in the Dispatcher role sends the Notification Template, the 10 contacts assigned to the Dispatcher role are selected for the Notification.
2. When the user in the Organization Administrator role sends the same Notification Template, all the staff contacts in the Organization are selected for the Notification.

To save a scheduled or recurring Notification as a Notification Template, select the Pencil icon in the row of the desired Notification. The **Edit scheduled/recurring** page appears. Scroll to the bottom of the page. In the **Send & Save** panel, select the **Now** radio button. Then select the radio button: **Save as a Notification template**, optionally enter a Category and/or Template ID, then click **Save**.

> **NOTE:** When at the Account Level, the Account Administrator sees only the templates saved at the Account level, although they can see any template that was created in a child Organization when it's accessed. The Organization Administrators can see any template that is created in their Organization. For other roles at the Organization level, the templates are

role-specific. If a role is allowed to create templates, then others in that role can use that template. For example, Dispatchers can see/use only templates created by other Dispatchers. However, if your Organization has five different Dispatcher roles, then each will see only the templates for their specific role and not the templates for the other four Dispatcher roles. Only Mass Notification Operators are 'assigned' templates.

Adding Notification Templates to the Role

If you have assigned your users to a Mass Notification Operator role, you must edit the role configuration to add this template to the role. Otherwise, your operators do not see this template in their lists of Incident types.

To add a Notification Template to the Mass Notification Operator Role:

1. Login to the system as an Account Administrator.
2. Click the **Roles** tab. The Roles page is displayed. The default view is the Account roles.
3. Select the desired radio button to View roles for information for:
    a. This Account name.
    b. A child Organization in this Account.
        i. Select the Organization from the drop-down list. The Role Types that have been added for the selected Organization are listed on the left-hand side of the page. A new Organization contains only the Organization Administrator role.
        ii. The right-hand panel displays the role profile: default Permissions (that are fixed for each role), and Assigned Users (the names of the users assigned to the role, if any).
4. Select the **Role Type: Mass Notification Operator** (or any respective nested role type).
5. Select the **Resources** subtab.
6. If your Mass Notification Operator does not need **Access to All**, select the radio button: **Limited access**. The Incident templates for your Organization appear. (Open the tree by clicking the Plus sign (+) next to the template name, if needed.)
7. Select the check box next to the Notification template names that you want your Mass Notification Operator role to be able access.
    a. For example, the "Team 1 - External" operator (based off the Mass Notification Operator role) has access to 10 Notification templates. The "Team 2 - Internal operator" (also based off the Mass Notification Operator role) has access to a different set of Notification templates.
8. Click **Save**.

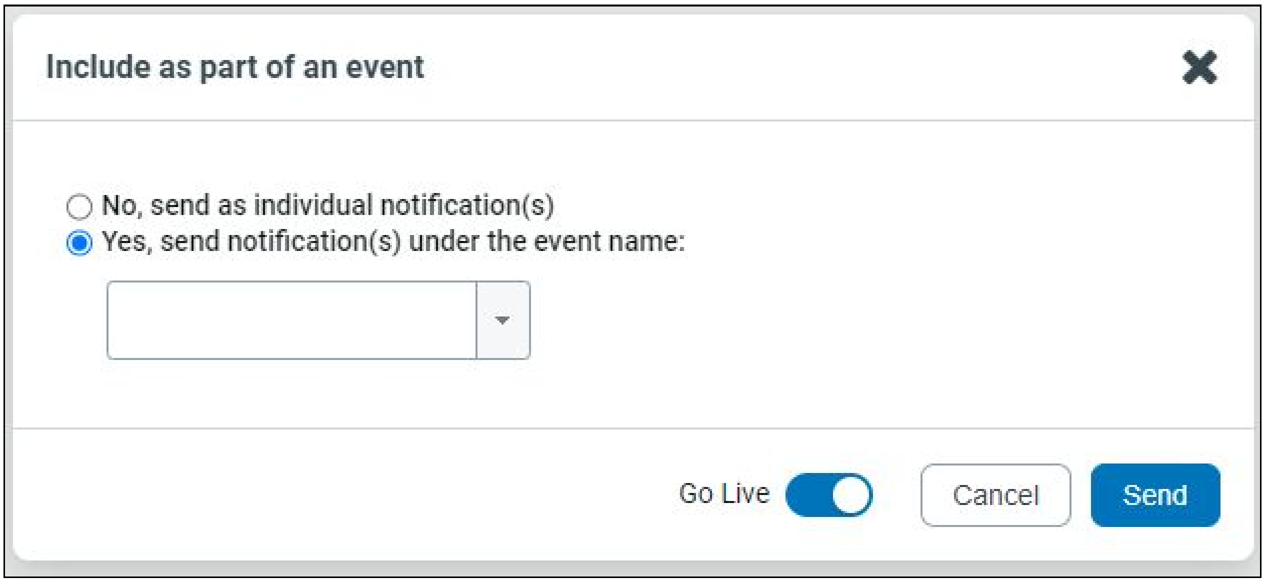
Reassigning a Template

From the Notification Templates page, you might see a template name with the following link: **Reassign this template**. The user role under which this template was created has been deleted. Click the template name to open it, then click **Save** to update the role and send.

Send Notification Templates

To quickly send a Notification template:

1. From the **Notification Templates** subtab, select the checkbox for each Notification template to send.
2. Click **Send**.
3. Select whether to add the Notification to an event. For more information, see Notification Events.
4. If Simulation Mode is enabled, you can toggle "Go Live" on or off. A simulated Notification is when "Go Live" is toggled off.
5. Click **Send.**

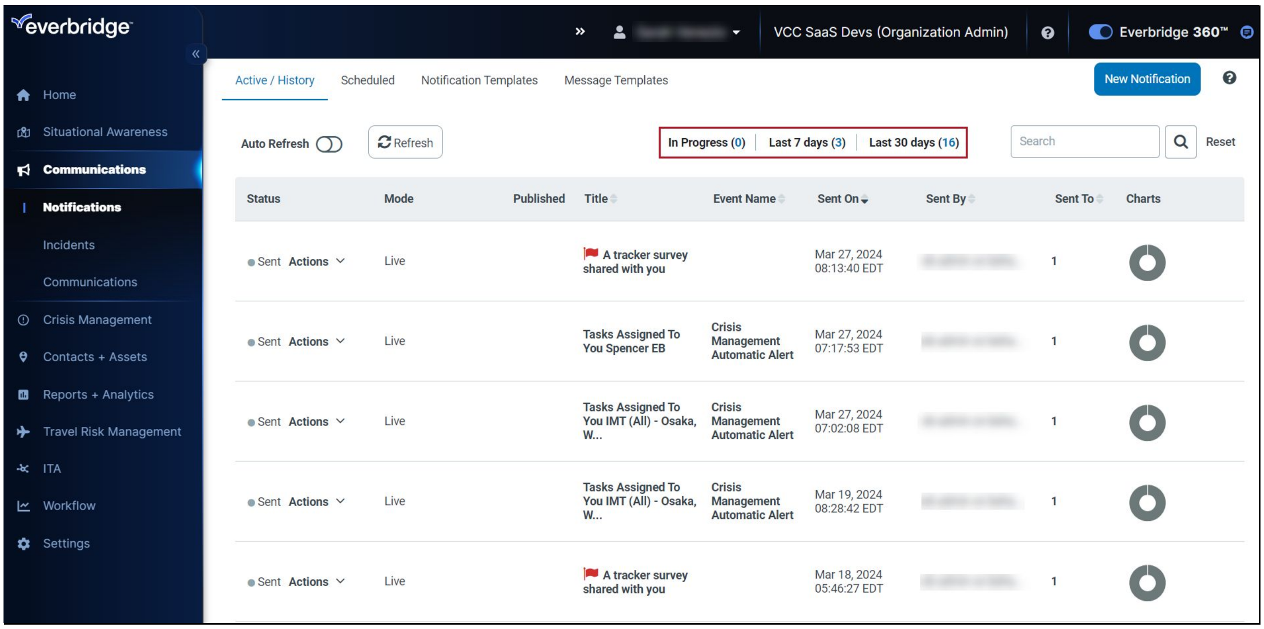


Update and Monitor Notifications

After sending your Notification, you can monitor its results and status. From the **Active/History** subtab, you can see how many Notifications:

- are currently active
- have been sent in the last 7 days
- have been sent in the last 30 days

Click the number in the Notifications according to the view you want to see.



The fields on the Active/History subtab are described in the following table:

Field or Area	Description
Search	Copy/paste the desired Notification ID or enter a string from the Title column. This search feature uses the “contains” condition. For example, to find all Notifications with the name “Office”, you could type the full word or the partial word, Office or off. When you click the Search (magnifying glass) icon, the application finds all Notifications whose names include “Office” or “off”. To clear the search, delete the search term, and click Search again.
Status	Indicates the status: Active (a green icon), Sent (a gray check mark), or Stopped (a red “X”).
Actions	The Actions drop-down menu offers the actions that you can perform: Stop (if Active), Rebroadcast Notifications, and Send

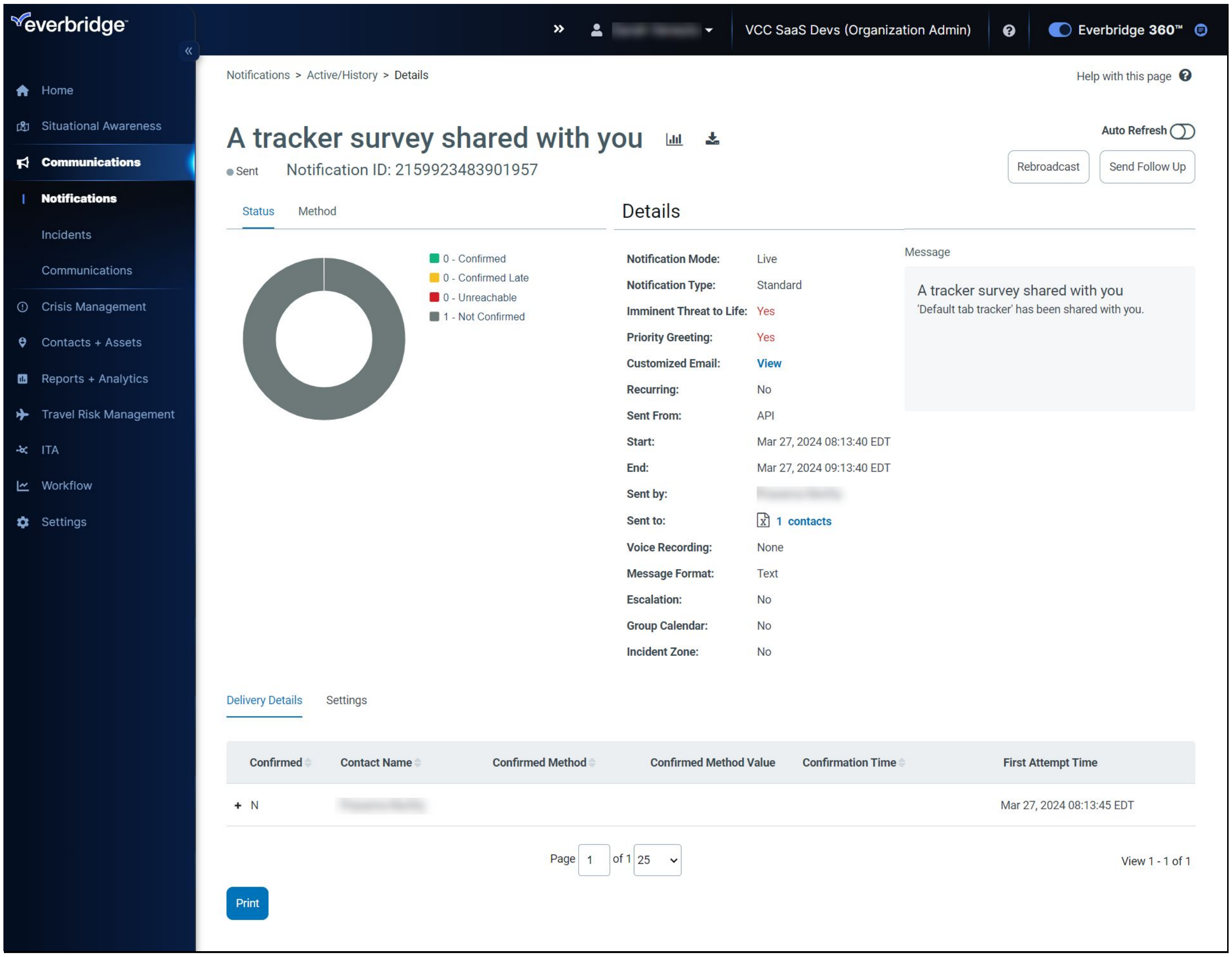
	Follow-Up Notifications. (These actions are also available from the Notification Details page.) An Up arrow indicates the Notification has escalations. This Up arrow replaces the Actions drop-down menu. If an Incident Zone, you can choose from: Stop (if Active), Send Follow Up, and Extend Incident Zone. Extend Incident Zone allows you to add more time to the Incident zone.
Mode	Indicates the mode: Live or Simulation.
Published	If you used a Publishing Option, a “P” icon appears in the row of the Notification. Hover your mouse over the “P” to see which publishing option: Everbridge Web Widget, Everbridge Desktop Alerts, Everbridge Network, Alertus, Web Posting, Social Media, Nixle Community Subscribers, Nixle Event Subscriptions, CAP Channels, Member Portal, or Audio Bulletin Board.
Title	The name of the Notification. Clicking the title opens the Notification Details page for that Notification.
Event Name	The name of the event of which your Notification is a part. Clicking an event name launches the Event Summary.
Sent On	When the Notification was sent.
Sent By	The full name of the user who sent the Notification.
Sent To	Shows the number of contacts sent the Notification. Click the link to see the names of the contacts, the attempt times, path types, paths, if the contact confirmed, the time of the confirmation, call results, and location. This report is a Microsoft Excel spreadsheet that you can optionally rename and save to your desktop. NOTE: The Call Results for an email are either “Sent” or “Not Delivered - Bounced Email”. When you see “Not Delivered - Bounced Email”, investigate the email addresses to learn why the email was not delivered. Resend or rebroadcast after fixing the issue.
Charts	Hover the mouse to see a quick view of the number of contacts confirmed, confirmed late, unreachable, and not confirmed. Click the pie chart for a larger view. Hover the mouse over the chart to see the percentages. From the larger view, you can also print the chart or save as a PNG or JPEG image, a PDF document, or a SVG vector image.

The Notifications are listed in order of their Send date; the most recent at the top of the list. You can sort the list by any of the columns. Click a column heading on which to sort. Click the column heading again to reverse the sort order.

Use the **Page Controls** at the bottom of the page to view the records. Use the drop-down list to set the number of records to display on each page. Step through the pages using the page controls (First Page, Previous Page, Next Page, Last Page).

Notification Details

In **Notification Details**, Everbridge Suite automatically groups all the Notifications for an event into a single view and a single report. This way, your Organization can review the Notifications and other artifacts, in chronological order.



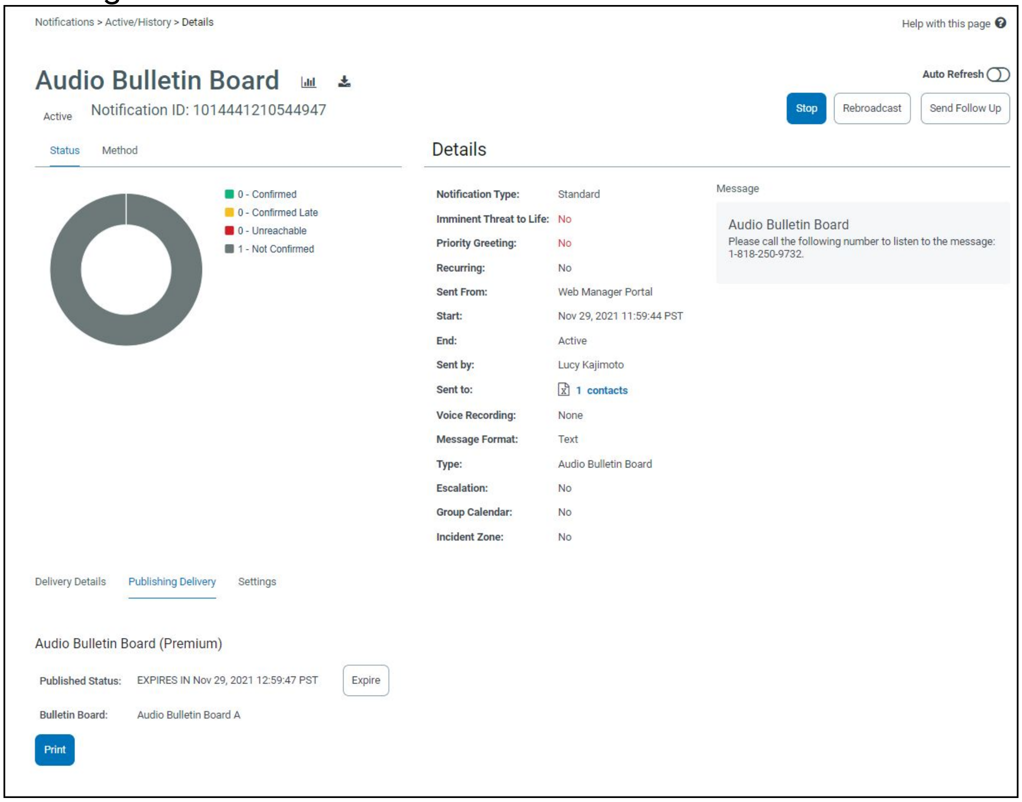
In addition, clicking the **Detailed Notification Analysis** icon () next to the Notification title displays the Quick Report where you do not need to access the report from the **Reports** tab. You can also download a zip folder that includes a Comma-Separated Values (CSV) file of contacts who were sent the Notification, the Notification details, Notification attachments, voice files, shape files, and so forth.

On the **Notification Details** page, click **Download** next to the Notification name to get a compressed folder containing all relevant information (detailed HTML report, attachments, Map area shapes files, images, voice file, delivery detail CSV file, and so forth) about the Notification. On downloading any CSV-formatted file, Everbridge Suite screens the data before downloading to your local system. If there is any suspicious content, such as strings that start with = + - @ " (except when - and + are followed by a number), then the CSV-formatted file is downloaded as a TXT file type during the download.

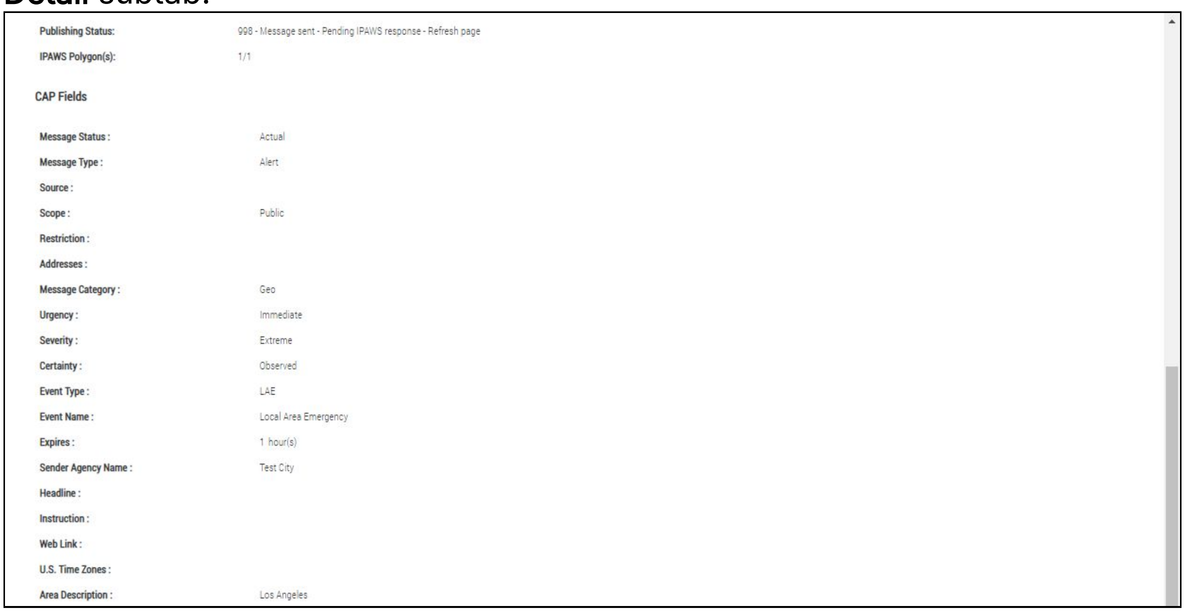
The **Settings** subtab displays the contact and Notification settings of this Notification.

> **NOTE:** The **Reply to E-mail** setting is not supported at the Account level.

- The **Notification Details** page for the Audio Bulletin Board publishing option shows the **Publishing Delivery** subtab.
  - For a **Basic Audio Bulletin Board**, if the publishing option has expired, the **Published Status** shows **Expired**, and the expiration time.
  - For a **Premium Audio Bulletin Board**, if the publishing option has expired, the **Published Status** shows **Expired**, the expiration time, and the audio bulletin board name.
    - For a Premium Audio Bulletin Board, if the publishing option has not expired, you can optionally remove a message by clicking Expire. Once removed, callers will no longer have access to the message.



- In the **Notification Details** page regarding a Member Portal Notification, note the **Publishing Delivery** tab, which shows the Member Portal web page as active. You can deactivate it by clicking **Deactivate**.
- In the **Notification Details** page using a Group Calendar, also note the **Group Calendar** column at the bottom right-hand side of the **Delivery Details** subtab. It shows the calendar name linked to the group.
- In the **Notification Details** page using a public Incident Zone, the Notification Duration and Contact Cycles are updated.
- If you click the **Sent to: # contacts** link, you can see an Excel spreadsheet showing further details.
- In the **Notification Details** page using a private Incident Zone, the Notification Duration and Contact Cycles are updated.
- If any Publishing Options are used, then the **Publishing Delivery** subtab displays that information.
- If the **Web Page** is active, you can deactivate it. Click **Deactivate** and click **Yes** to confirm the deactivation. The Notification is removed from the Member Portal until it is activated.
- The **CAP Channel** publishing option displays in its own **CAP Channel Delivery Detail** subtab.



- If you selected CAP RSS Feed and IPAWS, you will see a separate CAP RSS Feed that shows the CAP RSS Feed link. See the IPAWS Publishing Status Values from the Everbridge Support Center.

To view Notification details, click its title from the **Active/History** list. The following table describes the fields.

Field Name	Description

Escalation Summary	If the check box: Use Notification escalation was selected, in the upper left-hand corner of the Details page, you see the Escalation Summary. You see each escalation level. When you select an escalation, the Status subtab displays the corresponding chart.
Status and Name	Under the Escalation Summary, if there, you can immediately see the Notification name and its status.
Action buttons	Depending on the status, action buttons are provided for quick access. If the status is Active, you see a Stop button. You also see a Rebroadcast and Send Follow Up button if the status is not Stopped.
ID	If you need to contact Everbridge about this Notification, you must provide this ID number.
Notification Type	Standard, Polling, or Conference.
Priority	Yes = High Priority.
Recurring	Yes = Recurring.
Start	Date and time messages began broadcasting.
End	Date and time messages stopped broadcasting. If the Notification ran its duration, you see the corresponding times in the Start and End fields. If the Notification was stopped by a sender, the End time would be before the length of the duration.
Sent by	Message sender’s name.
Sent/Stopped on	Date and time sent or stopped. If stopped, you see the name of the person who stopped the Notification.
Voice Recording	The type of voice recording, if any.
Message Format	The format of the message, such as Text.
Event	Event name with which this Notification is associated, if any.
Attach Files	Names of any attached files sent to email, fax, or Everbridge recipients.
Conference Bridge	If used, the name, numbers, and access code of the conference bridge.
Message Title and Message	The message that was sent. If the message contained a recorded voice file, there is a link to the file. You can click the link to listen to the message.
Status	By default, the Results Chart shows confirmation status: Confirmed, Not Confirmed, Confirmed Late, and Unreachable. The pie chart shows the percentage of

	contacts in each of the statuses. From Active/History, hover the mouse over the chart to view the percentage of contacts in each status. You can also chart confirmations by delivery path. Use this to find the delivery paths that your contacts actually used to receive and confirm the message.
Delivery Details	To find out about individual contacts, click this tab. From this page, you can see information for each contact selected to receive the Notification. For all contacts, you can see if they confirmed receiving the message and the time they confirmed. By default, the list is displayed in alphabetical order by the Contact Name. You can change the sort by clicking a column heading. To see an individual's details, click the Plus (+) sign in the row next to the specified name; click the Minus (-) sign in the row next to the specified name to close the individual's details. This is where you see the history of each attempt to reach each contact and the results of each attempt.
Settings	The Settings show the contacts, groups, and rules used in this Notifications, as well as any contact polygons. The Notification settings section shows the key settings used to send the Notification.
Print	Click Print to print this report for distribution or archival purposes.

Filtering Notification Details

There are many ways to filter Notification data into reports. You can filter data:

- From the Notifications tab by clicking a Notification title to see all reporting options in the Notification Details.
- From the Reports tab by selecting quick reports. See Notification Quick Reports.

On the left-hand side of your Notification details, there is a pie chart.

For Standard type:

1. To view details on the status of your contacts' responses, click the **Status** subtab.
    - To download a CSV file of contacts of a certain status type, click the **Status** type in the list next to the pie chart.
    - The CSV file contains Notification details for each contact with the specified **Status** type.

For example, to view the contact details of contacts who are unreachable, click "**4 - Unreachable**" in the **Status** list. The CSV file automatically downloads to your device, containing the four unreachable contacts.

Everbridge recommends you review your unreachable contacts after a Notification to ensure they receive future Notifications.

2. To view details on which Delivery Method(s) contacts are using to respond, click the **Method** subtab (next to Status).
    - To download a CSV file of contacts who responded through a certain Delivery Method, click the **Delivery Method** in the list next to the pie chart.
    - The CSV file contains Notification details for each contact who responded through the specified Delivery Method.

      For example, to view details of who responded through the Everbridge Mobile App, click **Everbridge App** in the **Delivery Method** list. The CSV file automatically downloads to your device.

For Polling type:

1. To view details on the status of your contacts' responses or the poll response they selected, click the **Answers** subtab.
    - For status type:
        - To download a CSV file of contacts of a certain status type, click the **Status** type in the list next to the pie chart.
        - The CSV file contains Notification details for each contact with the specified **Status** type.

          For example, to view the contact details of contacts who are unreachable, click **4 - Unreachable** in the **Status** type. The CSV file automatically downloads to your device, containing the four unreachable contacts.
    - For poll responses:
        - To download a CSV file of contacts who responded with a certain poll response, click the poll response in the list next to the pie chart.
        - The CSV file contains Notification details for each contact who responded with the specified poll response.
2. To view all responses, click **Table View.**
3. To view details on which Delivery Method(s) contacts are using to respond, select the **Method** subtab (next to **Answers**).
    a. To download a CSV file of contacts who responded through a certain Delivery Method, click the **Delivery Method** in the list next to the pie chart.

b. The CSV file contains Notification details for each contact who responded through the specified Delivery Method.

   For example, to view details of who responded through the Everbridge Mobile App, click **Everbridge App** in the Delivery Method list. The CSV file automatically downloads to your device.

On the right-hand side of your Notification details, there is an option to download a CSV file of Notification Details for every contact to whom the Notification was sent. The CSV file contains every attempt to reach every contact on every delivery method selected for the Notification.

To view Notification details for every contact, click the value next to **Sent to:** to view the data in a CSV file.

This report is helpful to understand why a message is not delivered to a contact. For example, in the CSV file there is a column for **Call Result**. If the value is **Not Delivered -- Duplicate Path** or **Not Delivered -- No Associated Device**, that indicates a need to update contact data.

Saving Notification Polygons to the Shape Library

There are two ways to save a Notification's polygon to an Organization's Shape Library:

- Saving the polygon when creating a Notification.
- Saving the polygon post-launch from the **Notification Details** page.

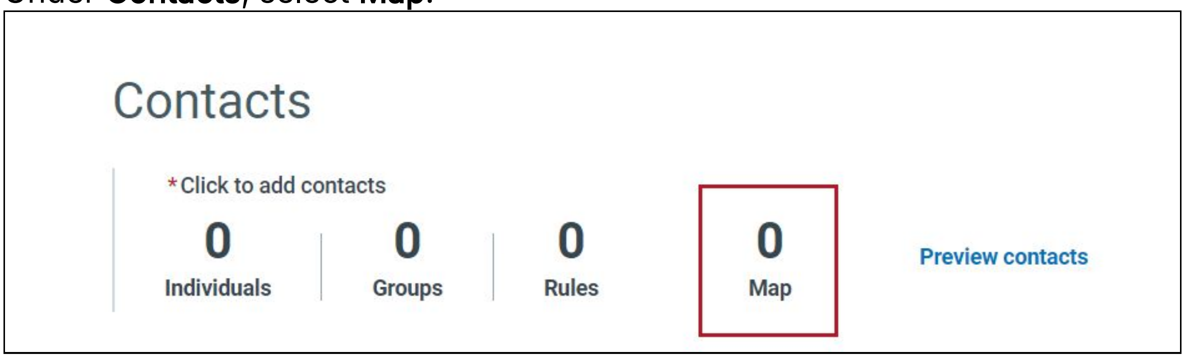
Once saved, they can be accessed from the Shape Library in the Universe.

Polygons can also be uploaded

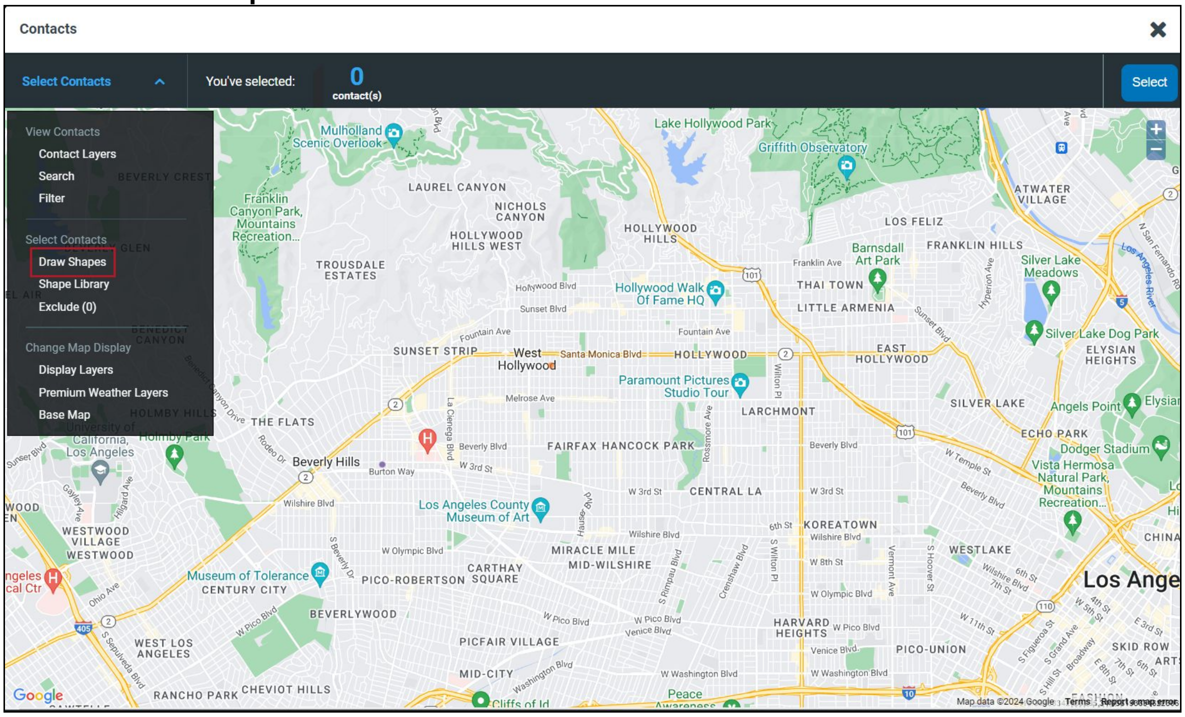
Saving Polygon when Creating a Notification

To save a polygon during the Notification-creation process:

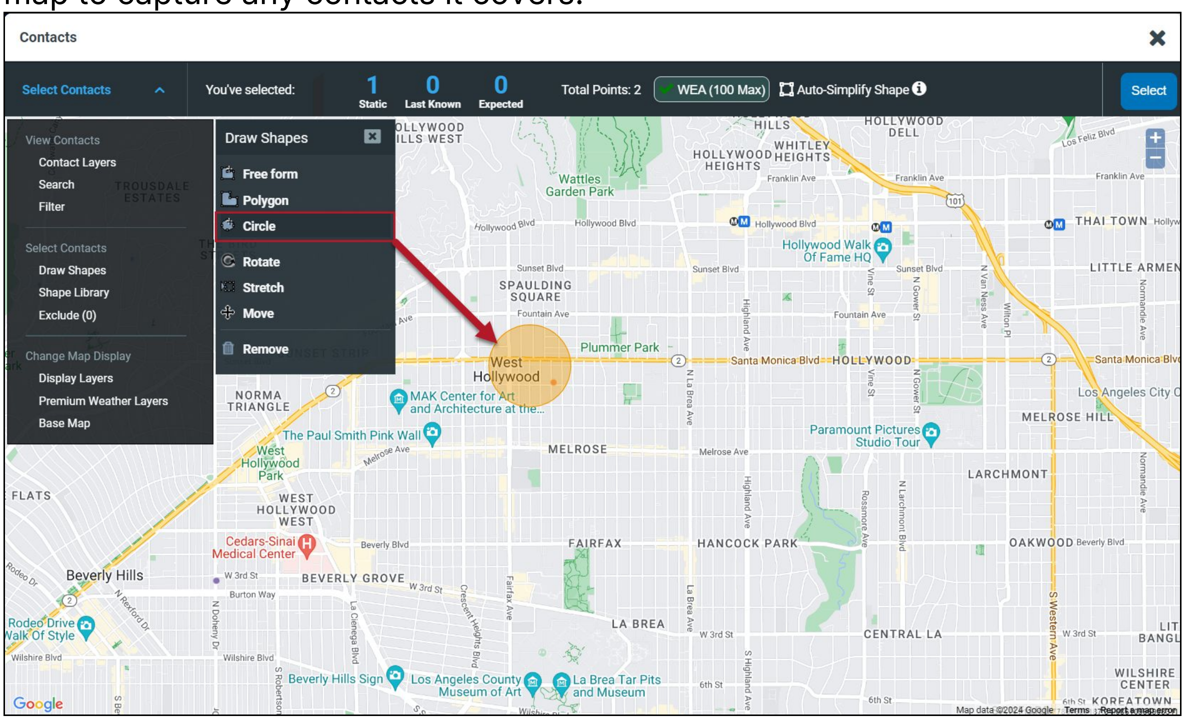
1. Fill out the Message and Publishing Options sections of the **Create Notification** form.
2. Under **Contacts**, select **Map**.



3. The map will appear. Click **Select Contacts** from the top menu bar, and then select **Draw Shapes**.

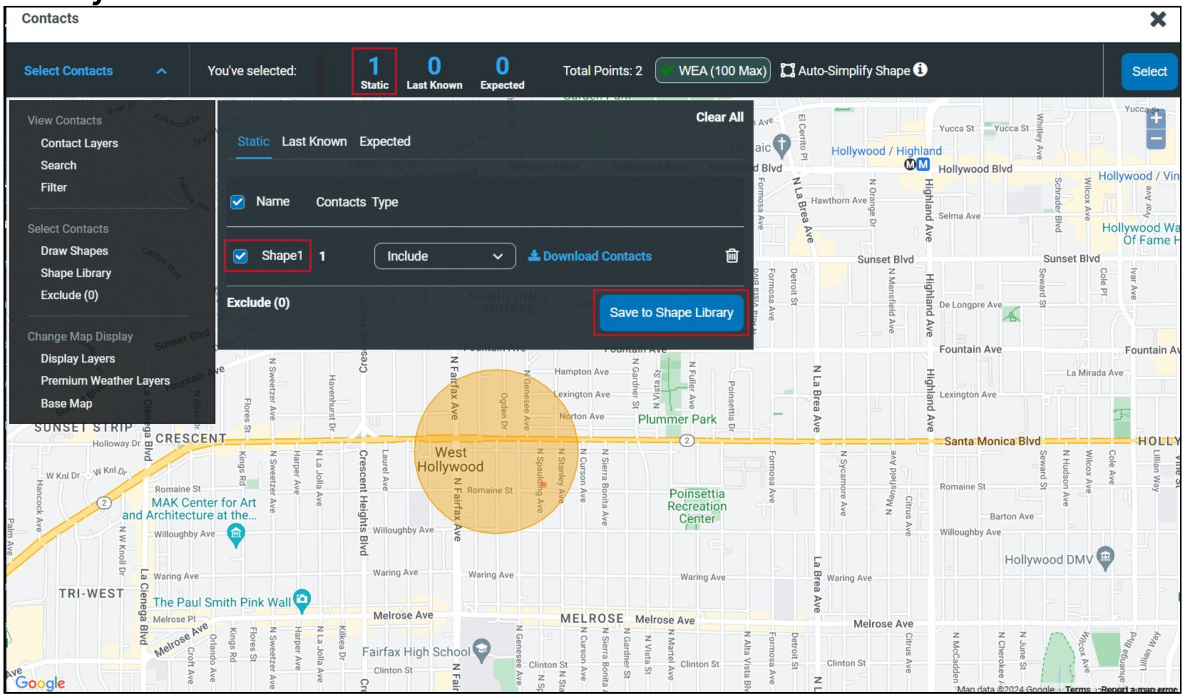


4. The **Draw Shapes** menu will open. Pick the desired shape and draw it on the map to capture any contacts it covers.



5. Once a shape is drawn, the numbers for **Static**, **Last Known**, and **Expected Locations** will update accordingly. Click one of the numbers.

6. A new panel will open. Select the drawn shape, then click **Save to Shape Library**.

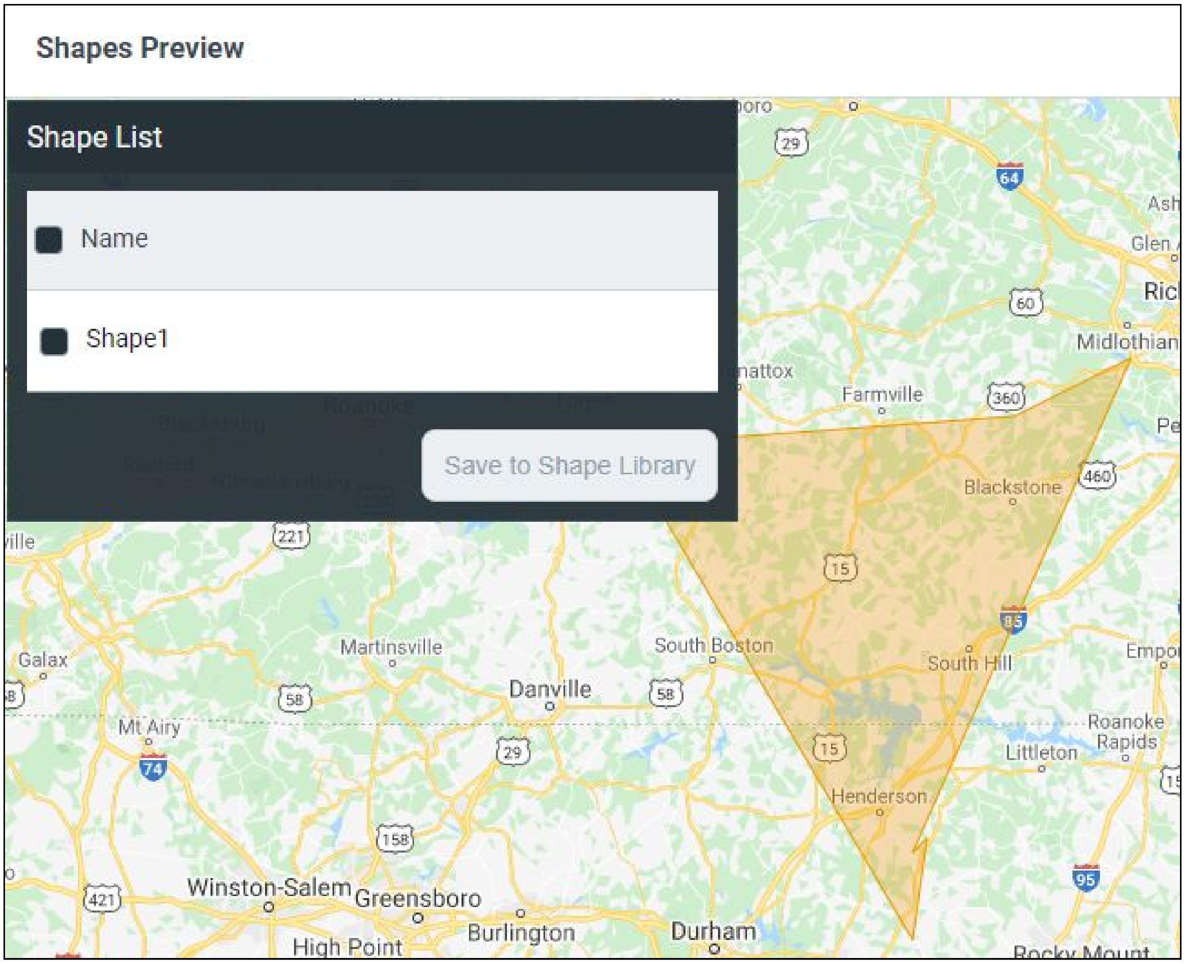


Saving Polygon from Notification Details

If you have drawn a polygon when adding contacts from the Notification using the map, the Notification Details page will display the shape.

To save this shape:

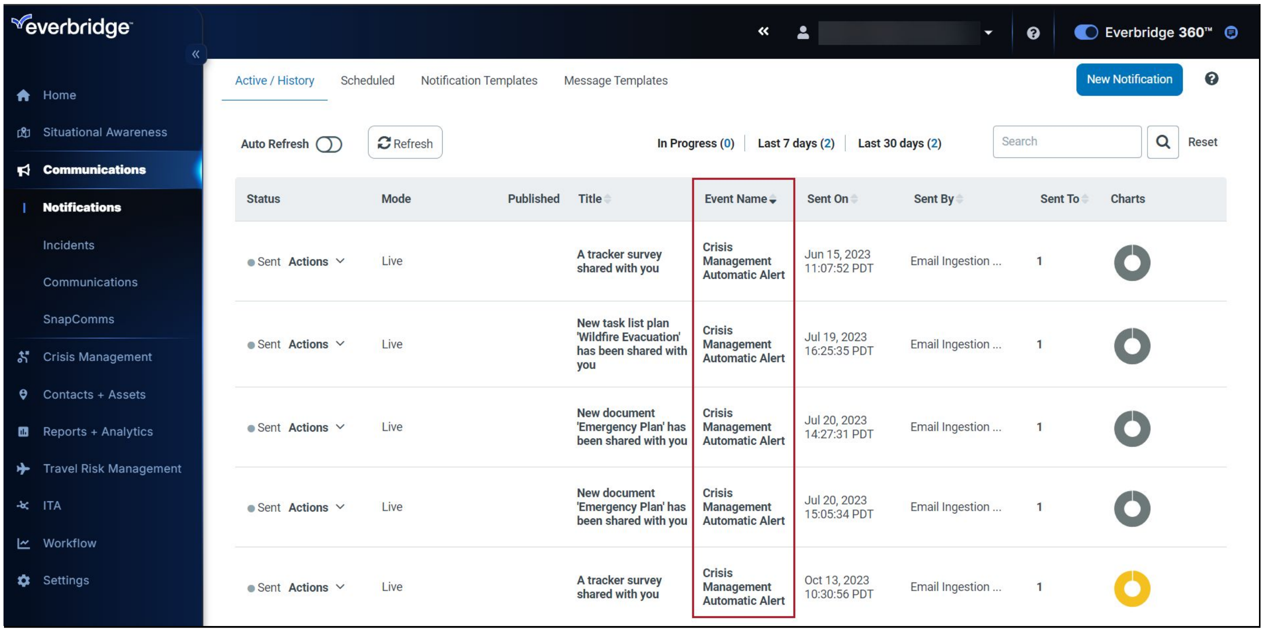
1. On the **Settings** subtab of **Notification Details**, click **Expand** (in the upper right-hand corner of the polygon), to expand the polygon. The **Shapes Preview** is displayed, where you can save one or more shapes to the **Shape Library**.
2. From the **Shape List**, select one or more shape options and click **Save to the Shape Library**.



3. Provide a **Name** and optionally select a **Folder** from the drop-down list, then click **Save**. You are returned to the **Notification Details**.

Event Summary Reports

To view the Notifications that are associated with a Critical Event, look at the Notifications history from the **Active/History** subtab. For each Notification, you see the event name associated with it next to the Notification title, if any.

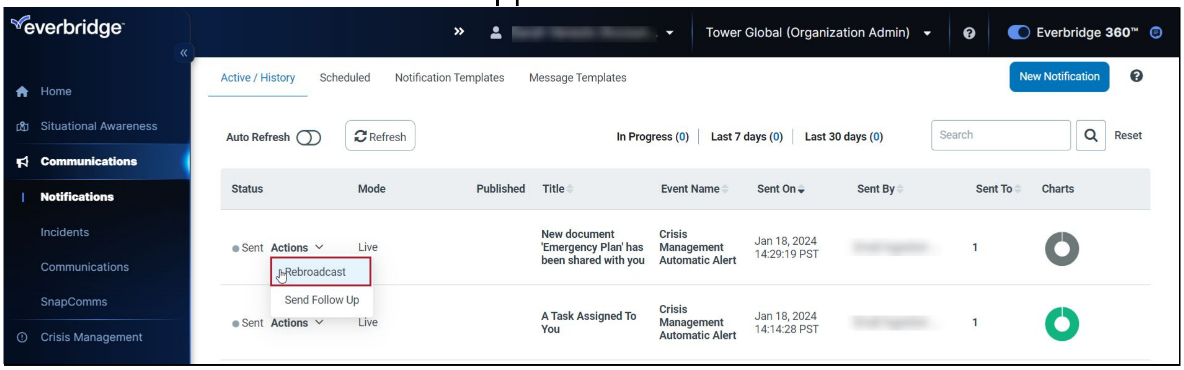


To view an Event Report, see Event Analysis.

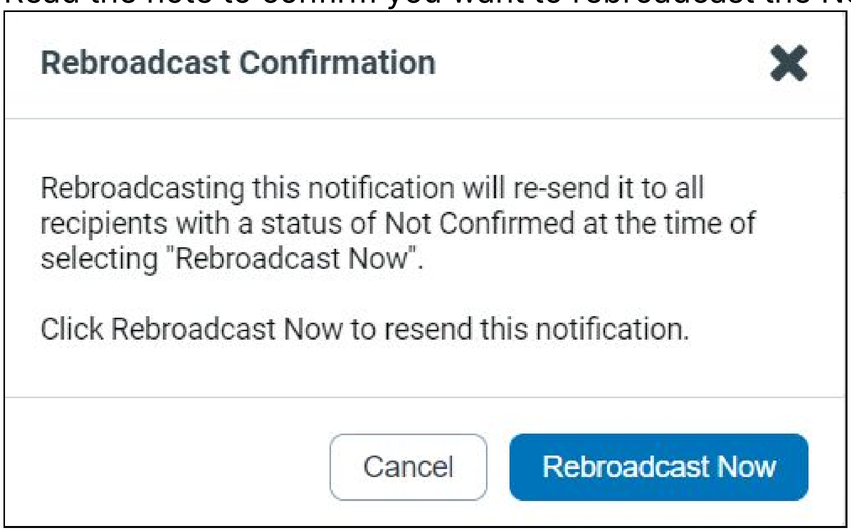
Rebroadcast Notifications

A rebroadcast resends the original message to contacts who have not yet confirmed receiving it. That is, the rebroadcast action resends the desired Notification to only those contacts who have a confirmation status of **Not Confirmed** at the time the rebroadcast is initiated.

1. From the **Notifications** tab or the **Notification Details** page, click **Rebroadcast**. The Rebroadcast Confirmation appears.



2. Read the note to confirm you want to rebroadcast the Notification.

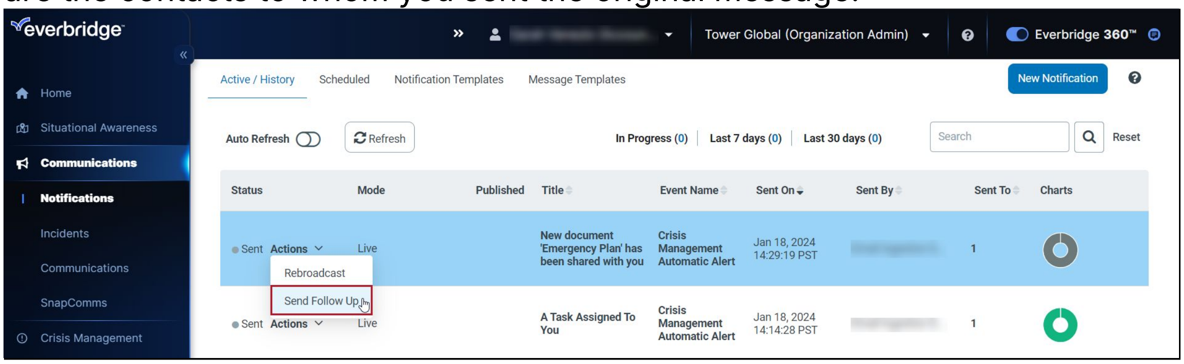


3. Click **Rebroadcast Now**.

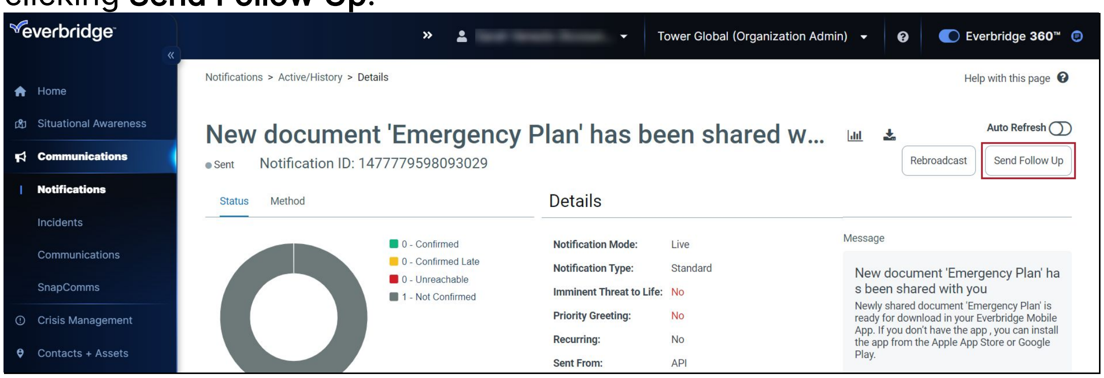
Send Follow-Up Notifications

To send a Follow-Up:

1. From the **Active/History** page, click the **Actions** dropdown next to a Notification Status, and then **Send Follow Up**. The targets of this Notification are the contacts to whom you sent the original message.

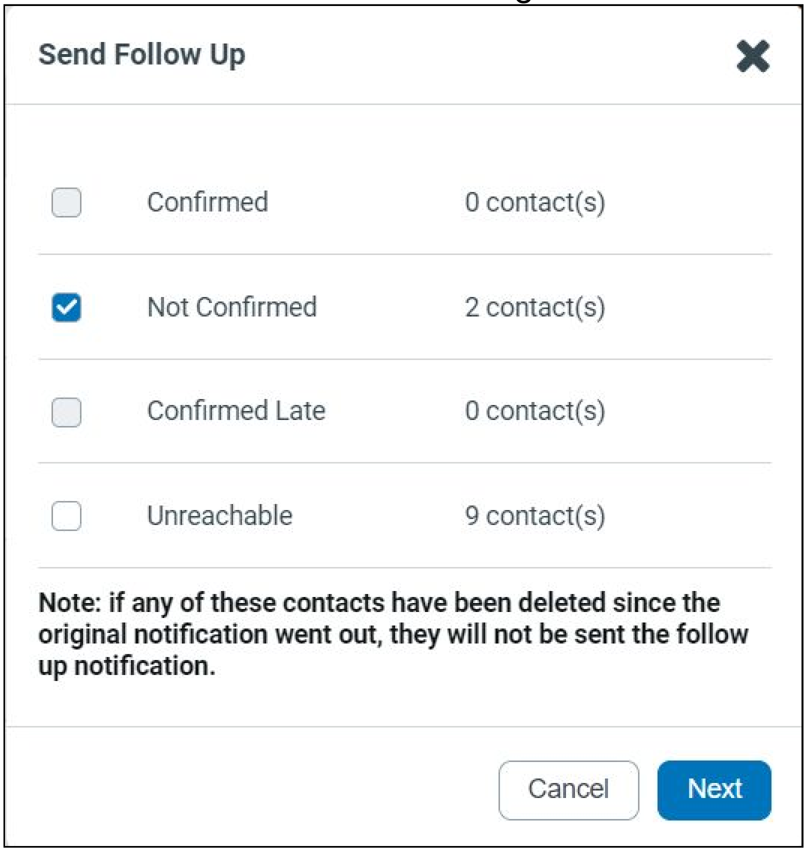


- This can also be performed from the **Notification Details** page by clicking **Send Follow Up**.



2. Select the checkboxes corresponding to the people who should get the follow-up message: **Confirmed**, **Confirmed Late**, **Unreachable**, and **Not Confirmed**. For example, you will want to select all checkboxes if everyone

should receive an **All Clear** message.



3. Click **Next**. The original Notification is displayed. You can change this in full or partially by adding a few words to the title. Using the example above, you could add **Cancelled** to the title and a sentence at the end of the body: **This warning has been cancelled**.
4. If there is an uploaded Voice for the original message, delete it by selecting the **Trash Bin** and record your updated message. Or, you can allow text-to-speech to be generated instead of recording or uploading an updated follow-up voice message.
5. Review and edit the **Settings**, as needed.
6. Click **Send**.

Send Nixle Follow-Up

To send a Follow-Up for Nixle:

1. From the **Notification Details** page, click **Send Follow Up**. The targets of this Notification are the contacts to whom you sent the original message.
2. Select the check boxes corresponding to the people who should get the follow-up message: **Confirmed**, **Confirmed Late**, **Unreachable**, and **Not Confirmed**. For example, you will want to select all checkboxes if everyone should receive an **All Clear** message.

3. Click **Next**. The original Notification is displayed. You can change this in full or partially by adding a few words to the title. Using the example above, you could add **Cancelled** to the title and a sentence at the end of the body: **This warning has been cancelled**.
4. Select the **Alert Status** check box.
5. Send the Follow-Up only for the latest updated Notification.

> **NOTE:** You cannot send the Follow-Up for Cancelled/Expired/ Deactivated Nixle Notifications.

Stop Notifications

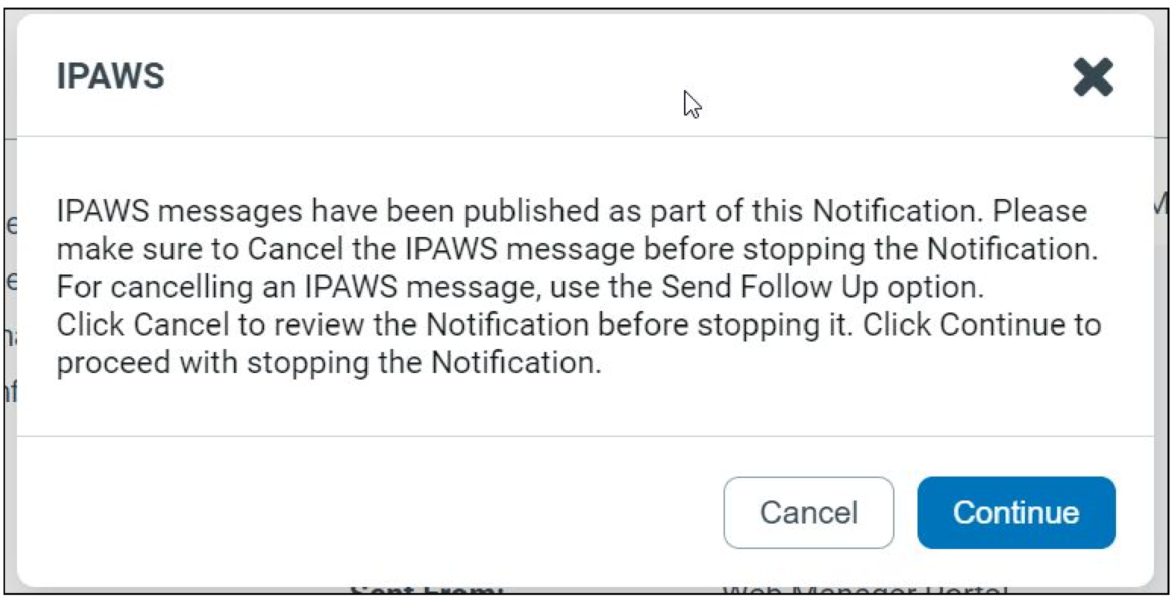
When you send a Notification, you can stop it if needed:

1. From the **Active/History** page, click the **Actions** drop-down menu next to the Notification to be stopped.
2. Select **Stop**.
3. After confirming the stop, the Notification status changes to **Stopped**.

Stopping IPAWS Notifications

The process for stopping an IPAWS Notification is slightly different in that it requires the IPAWS message to first be canceled before the Notification can be stopped. For more details, Send Cancel or Update for IPAWS Message

If a user tries to stop an IPAWS Notification before first canceling the IPAWS message, they'll see the following reminder:



Setting Up to Launch by Phone

You can send a notification by phone (that is, landline phone, VoIP phone, mobile phone) even when you have no access to the Internet or Wi-Fi. This can be a standard Notification, a Polling Notification, or a Conference Notification. The recipients can be in the same or different country as the sender and have devices in multiple countries.

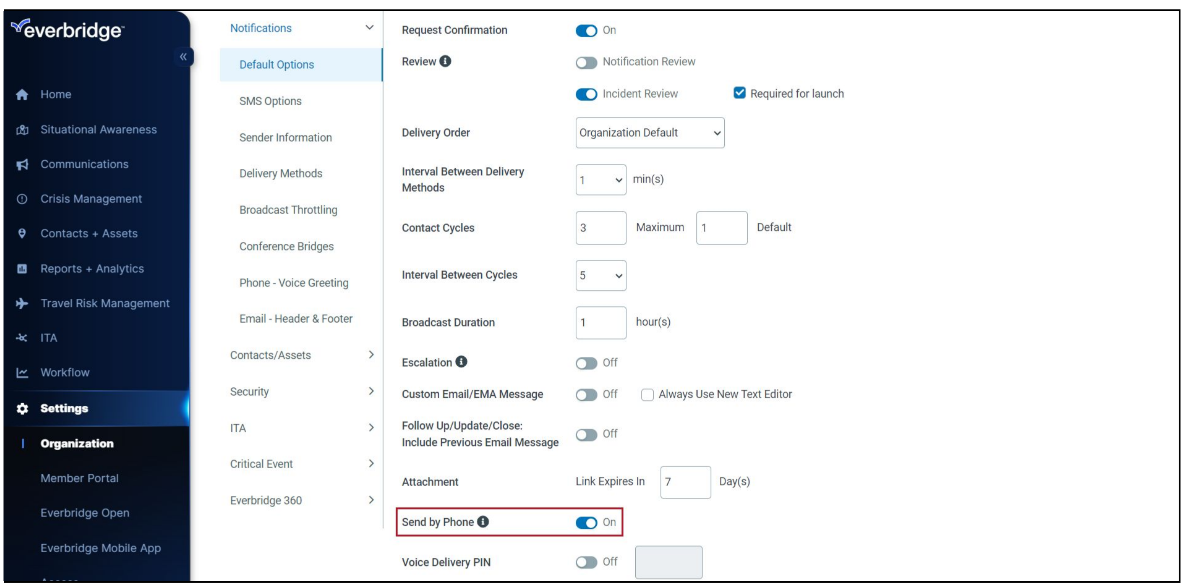
In order to use this feature, set up the following items in Everbridge Suite:

- Add a numeric username and password to your user profile (see Setting Up to Launch by Phone,).
- Add a custom Organization ID (see Adding a Custom Organization ID).
- Add one or more Notification Templates and Incident Templates, and assign a custom Template ID to the desired templates. (see Setting Up Your Notification Template).

Enabling the Access by Phone Feature

To select the Notification type in Notification Default Options:

1. From the **Settings** tab, select the **Organization** subtab.
2. Select **Notifications** > **Default Options**. The Default Options page is displayed.

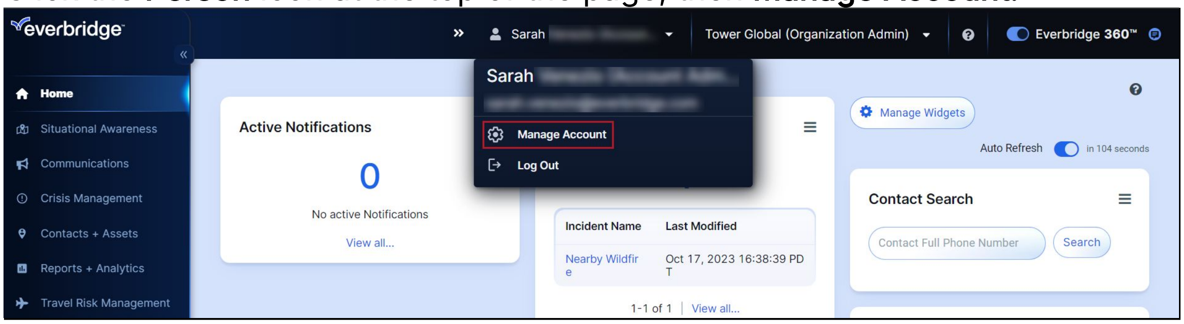


3. From the **General** subtab, toggle on **Send by Phone**.
4. From the **Incidents** subtab, toggle on **Send by Phone**, which applies only to Notifications associated with an Incident.
5. Click **Save**.

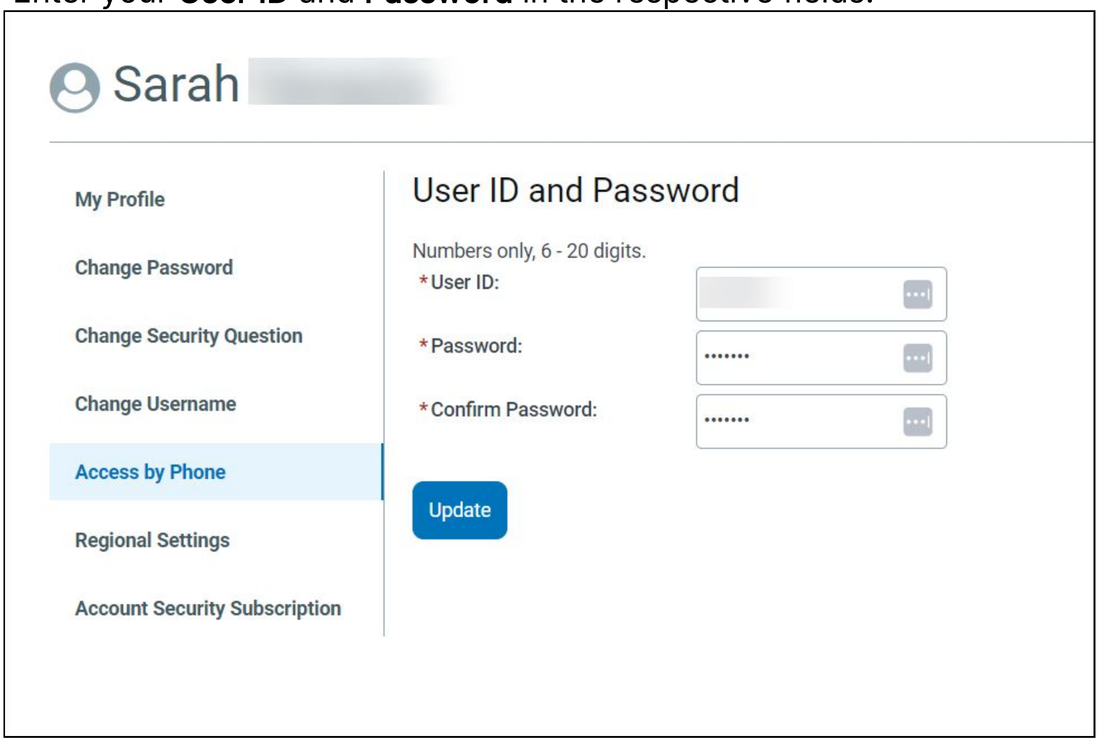
Adding a Username and Password to Your User Profile

To be able to launch Notifications by phone:

1. Login to Everbridge Suite.
2. Click the **Person** icon at the top of the page, then **Manage Account.**



3. Your user profile is displayed. Select **Access by Phone** from the left-hand panel.
4. Enter your **User ID** and **Password** in the respective fields.



- The User ID and Password must be numeric, but the fields cannot be identical. For example, if the User ID is “991100”, then the value in the Password field cannot also be “991100”.
  - The fields can only contain digits 0-9, but cannot start with zero (0).
  - The values cannot contain all the same digits (such as all “1”, as in 111111).
- The values cannot be any of the following and the reverse of any of them: 123456, 1234567, 12345678, 123456789, 1234567890.

- Minimum length: 6 digits
- Maximum length: 20 digits
- The values cannot be empty.
- The values cannot contain spaces (no leading spaces, no spaces between digits, and no trailing spaces).
- The values cannot contain any non-alphabetic special characters or alphabetic characters.

5. Click **Save**.

Adding a Custom Organization ID

To assign a custom Organization ID:

1. From the **Settings** tab, select the **Organization** subtab. The Organization Details page is displayed.
2. In the **Custom Organization ID** field, enter up to 10 digits. This optional Organization ID is needed to access certain premium features.
3. Click **Save**.

Setting Up Your Notification Template

To assign a Template ID to your Notification Template:

1. At the **Send & Save** pane, select **Save as a Notification template**.
2. Optionally, enter an **Event** name to make it quicker to find when you want to send the Notification template. Select one of your previous Event names from the drop-down list or enter a new event name directly into the text box.
3. Enter a **Template ID** using up to 20 digits, not starting with zero (0). This allows you to launch your Notification by phone when you have no access to the Internet or Wi-Fi.

Launching a Notification by Phone

When you cannot access the Internet or Wi-Fi, you can still launch Notifications if you have set them up. Ensure you set up your Notification template IDs and Organization in the rare case you must broadcast without access to the Internet or Wi-Fi.

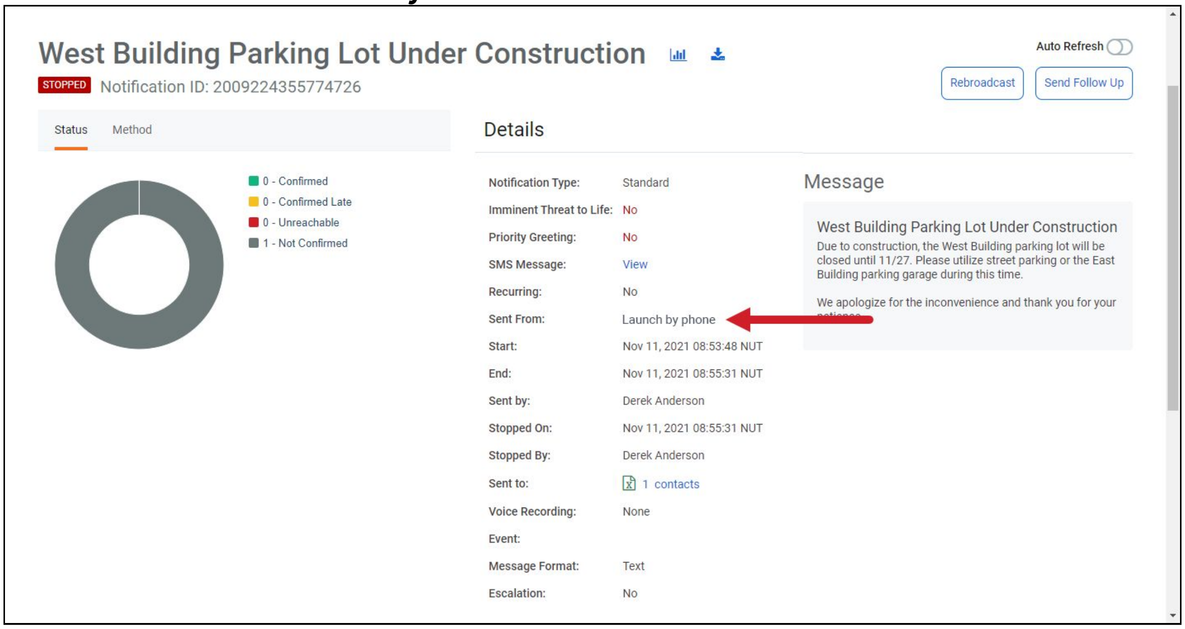
To launch a Notification by phone:

1. Using your phone, dial the respective phone number from the following table:

Description	Number
Global Direct Phone	+1 857-444-0443
Canada Toll-Free	800-971-5015
Puerto Rico Toll-Free	800-971-5015
United Kingdom Toll-Free	0800-088-5445
United States Toll-Free	800-971-5015
United States Virgin Islands Toll-Free	800-971-5015

   You will hear: “Welcome to the Message Center, powered by Everbridge.”
2. Follow the on-phone instructions, as shown next. Account Administrators should enter the following information:
   - Enter your user ID and press #.
   - Enter your password and press #.
3. Enter your custom **Organization ID** if asked.
4. If you have multiple Notifications, enter the **Template ID** number and press # (or press * to hear a list of all the template IDs).
5. Press **1** to confirm your Notification Template ID or follow the instructions to hear a list of Template IDs. Each Notification was set up in **Notifications > Send & Save > Save as a Notification Template**.
6. Press **1** to send your Notification now.
7. Hang up when instructed.

8. Log in to Everbridge Suite to see the **Active/History**. The Notification Details show **Sent From: Launch by Phone**.



What is Everbridge 360™?

Everbridge 360™ is your one platform for enterprise resilience for all organizational roles. It is designed to allow effortless experience across all Everbridge product lines. In building an effortless experience, we can ensure:

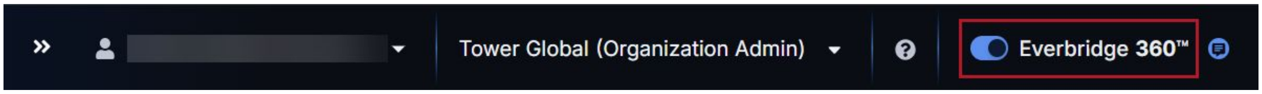
- **Faster**, more **accurate** responses to **external** and **internal** threats.
- **Managing** what is important – your **People** and **Assets**.
- **Resilience** = **Proactive**, not reactive.
- Enterprise-class **reliability** and **scale**.
- **Open Extensible** Platform.

Everbridge 360™ includes the following features:

- Combined collapsible left-side **Apps Menu** to allow for seamless navigation across all applications and modules.
- New **Event Types** with predetermined event categories based on risk intelligence feeds with the ability to create custom event types to link together events, alerts, and templates, decreasing the mean time to communicate.
- New **Communications Workflow**, combining the best of both worlds between the preexisting Notification and Incidents functionality with new feature enhancements to optimize the launch process, reduce training time, reduce the opportunity for errors, and help mitigate the "fear of sending out."
- Enhancements for the Communications Workflow, including:
    - Event-driven communications.
    - Title of a Communication differentiated from message subject line.
    - Ad-hoc Communication based on the Organization's default settings.
    - Preview templates before using them.
    - Ability to customize attachments and contacts for each Communication.
    - Ability to add/exclude/remove recipients for each Communication.

Everbridge 360™ Toggle

Once enabled for your Organization by an Administrator under **Settings** > **Organization** > **Everbridge 360** > **Default Settings**, each user will have a toggle to enable the Everbridge 360™ experience while simultaneously retaining access to existing modules like Notifications and Incidents.



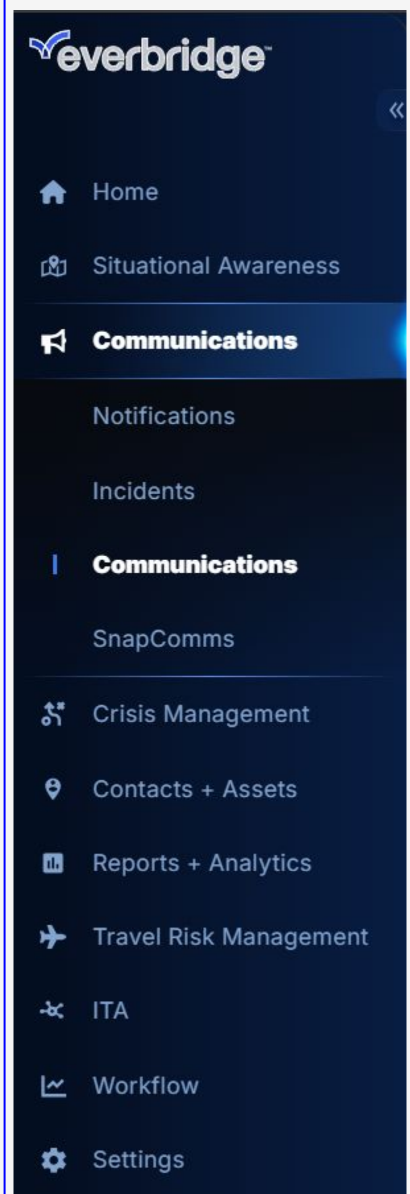
There are a few considerations to keep in mind when using the toggle as an Admin:

1. The Admin's user-level toggle at the Account level will be **OFF** by default. Unlike at the Organization level, there is no Account-level setting that controls the visibility of the user-level toggle at the Account level.
2. The option in **Organization Settings** controls the visibility of the toggle at the Organization level, which is **OFF** by default. All Organization Admins can access this Setting irrespective of the status of the Account-level toggle.
3. If the first is enabled by a user and the second is disabled by the Organization Admin, then the left side menu will only be displayed at the Account level for the respective user.
4. If the first is enabled by a user and the second is enabled by the Organization Admin, then the left side menu will be displayed at both the Account and Organization levels for the respective user. Toggle preference will persist at both the Account and Organization levels.

Navigation Menu

The new left-side navigation menu is the gateway to Everbridge 360™. It combines all the products you know and love but in an easier-to-navigate menu in a combined platform experience, exposing those areas that you need the most to the surface.

Menu Items	Collapsed View	Expanded View

• Home
• Situational Awareness
  ◦ Universe
  ◦ Visual Command Center
• Communications
  ◦ Notifications
  ◦ Incidents
  ◦ Communications
  ◦ SnapComms
• Crisis Management
  ◦ Launch Critical Event
  ◦ Events
  ◦ Submissions
  ◦ Reports
  ◦ Critical Event Templates
  ◦ Task List Templates
  ◦ Document Library
  ◦ Widget Library
  ◦ Form Library
  ◦ Audit Log
• Contacts + Assets
  ◦ Contacts
		

Menu Items	Collapsed View	Expanded View
∘ Assets • Reports + Analytics ∘ Reports ∘ Analytics • Travel Risk Management ∘ Travel Risk Intelligence ∘ Traveler Alerts ∘ Booking Alerts ∘ Country Risk Traveler Report ∘ Arrival and Departure Report ∘ Travel Report Scheduling ∘ Custom Travel Reports • ITA ∘ Open Incidents ∘ Trends ∘ Operations • Workflow ∘ CEM Orchestration ∘ Flow Designer • Travel Risk Management • ITA • Settings ∘ Organization ∘ Member Portal ∘ Everbridge Open		

Menu Items	Collapsed View	Expanded View
◦ Everbridge Mobile App ◦ Access		

Event Types

Event Types define the type of events that impact your Organization and are tied to the types of Communications you would like to launch to your contacts. Link every Communication to an Event Type for ease of tracking, reporting, and retrospective capabilities. Event Types will consist of **Event Type** (parent level) and **Event Type Subcategory** (child level).

Risk-related Event Types (same as Category/Subcategory in Visual Command Center) will be available out of the box. Administrators can define custom Event Types under **Organization Settings**.

These permissions are disabled by default for non-Administrators but can be enabled and configured if required. Note that some permissions are dependent upon others:

- **Update** requires **View**.
- **Create** requires **View** and **Update**.
- **Delete** requires **View**, **Update**, and **Create**.

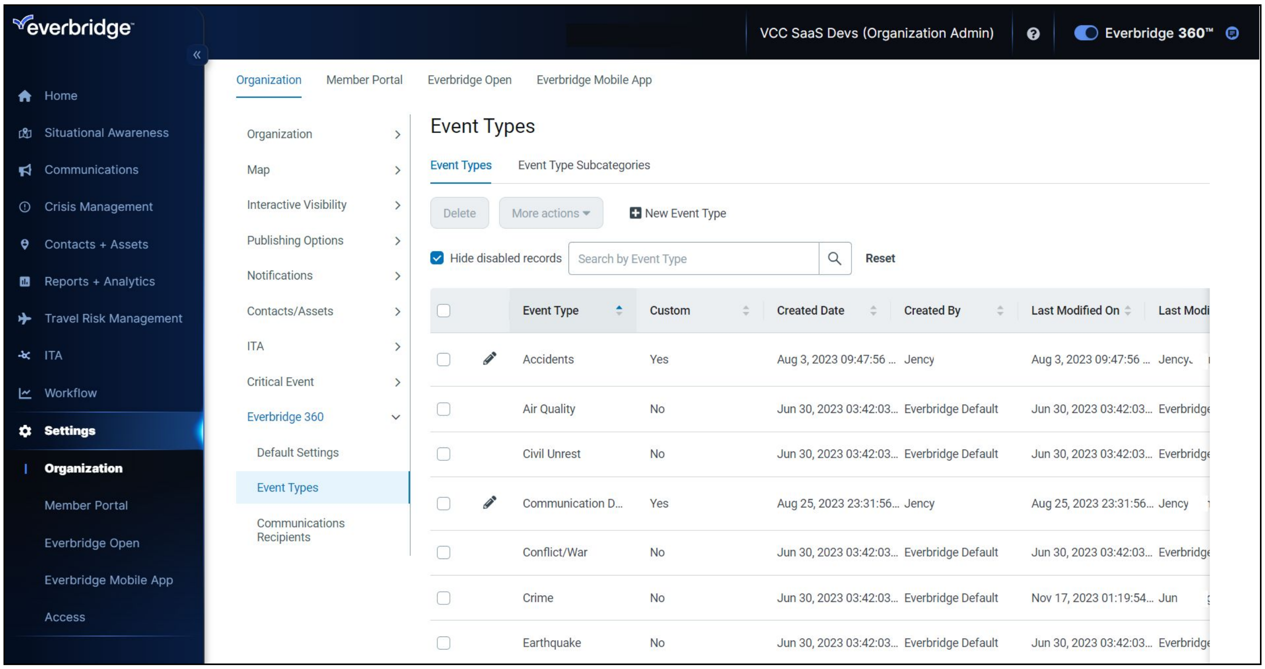
Things to consider when creating event types based on future potential scope:

- Auto-suggests active Alerts linked to the selected Event Type.
- Associate Templates to Event Types.
- Configure Role permission to Event Types.
- Communications workflow driven by Event Types.

TIP: It's recommended to create custom Event Types in advance so that they're ready for use when the need arises.

Configuration of Event Types

Event Types can be configured at **Settings** > **Organization** > **Everbridge 360™** > **Event Types**.



Event Types will consist of an **Event Type** (parent level) and an **Event Type Subcategory** (child level). Risk-related Event Types will be available out of the box.

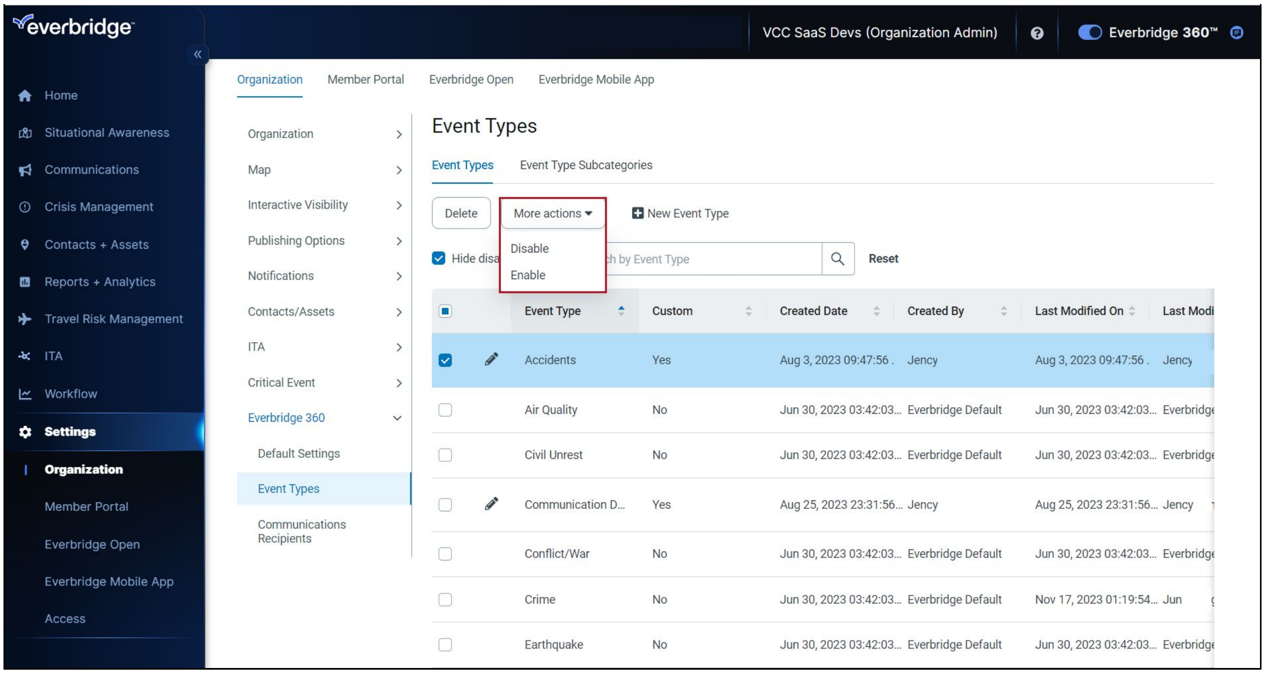
> **NOTE:** If you are a Visual Command Center (VCC) customer, **Risk-related Event Types** are the same as **Category/Subcategory** in VCC.

The main display will show event type names, whether the event type is custom, the creation date, who created the event type (out-of-the box event types will be noted with Everbridge Default), the last modification date, and who last modified the event type.

By default, disabled records will be hidden, but you can see them by unchecking the **Hide disabled records** checkbox.

Event Types can be deleted by checking the box next to the desired entry and then clicking **Delete**.

Additional actions include the ability to enable and disable both custom and Everbridge Default event types.

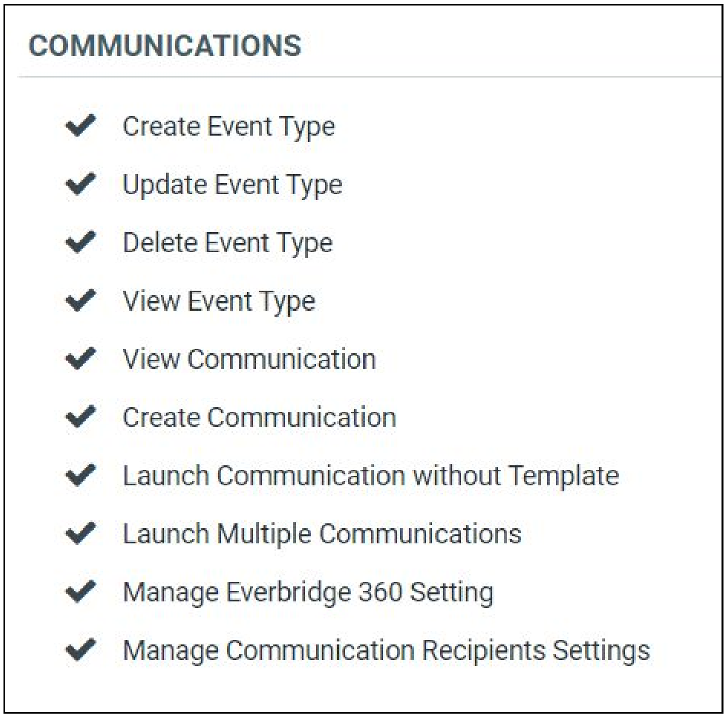


NOTE: Disabling Everbridge Default Event Types may impact features in the Communications module as they are designed to complement each other.

Whether or not you are able to manage Event Types is tied to your role/ permissions.

- Account Administrator (non-configurable and enabled)
- Organization Administrator (non-configurable and enabled)
- The following permissions are auto-on but configurable for Incident Administrators, Incident Operators, Mass Notification Operators, and Group Managers:
    - **Communications** > **Create Event Type** (optional with dependency on View Event Type)
    - **Communications** > **Update Event Type** (optional with dependency on Create Event Type)

  - **Communications** > **Delete Event Type** (optional with dependency on Create Event Type)
  - **Communications** > **View Event Type** (required to send Communications)

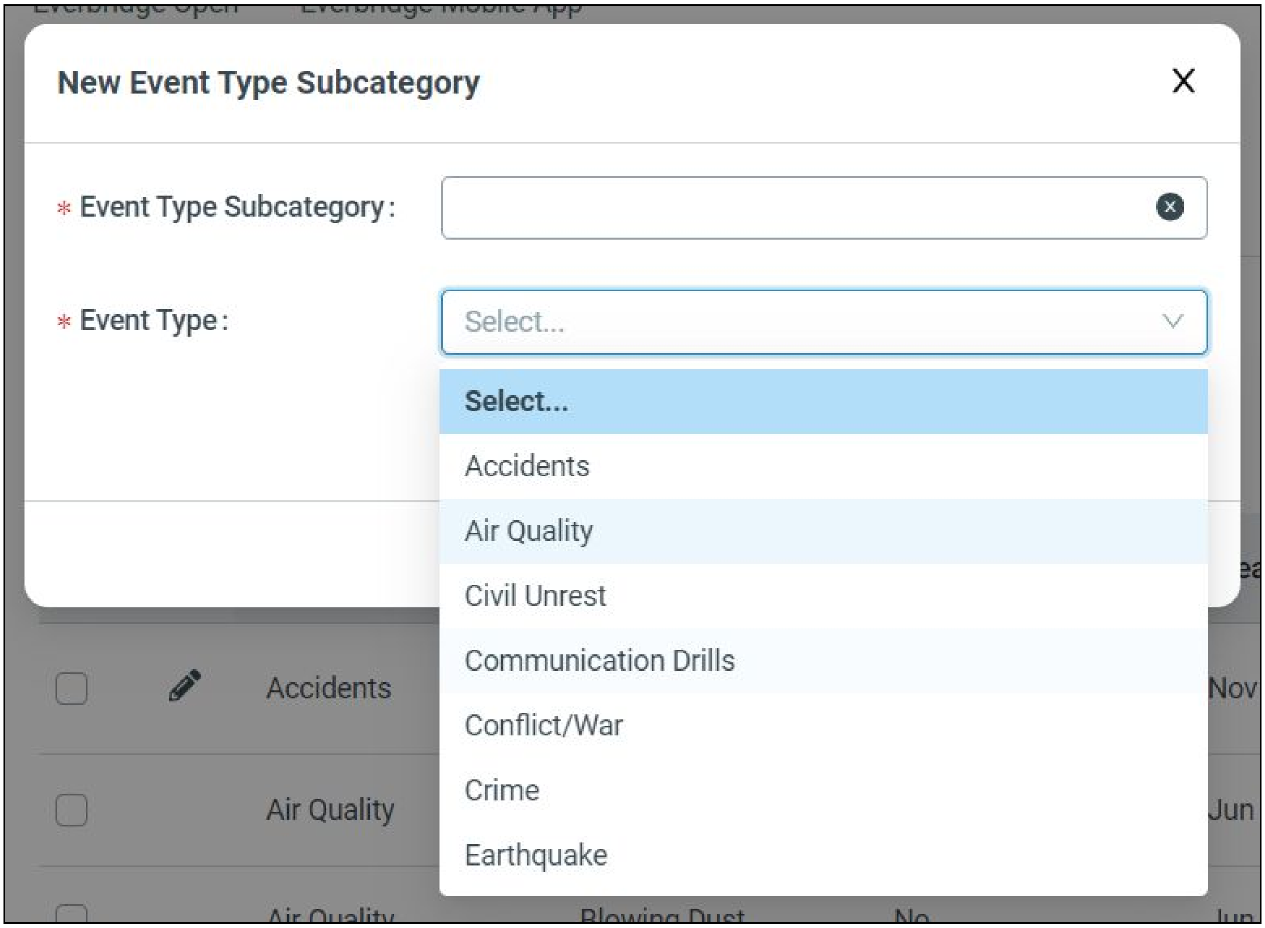


New Event Type

When creating a new Event Type, add the Event Type name to the **Event Type** field.

New Event Type Subcategory

When creating a new Event Type Subcategory, add the Event Type Subcategory name to the **Event Type Subcategory** field. Note that Event Types must be created before they can be added to an Event Type Subcategory.



Communications Workflow

When responding to a situation, you need to choose the action that represents the best way to handle the situation. For example, a hurricane is approaching one of your main warehouses and a watch has been called. The storm has already reached Category 2, and 20 employees and contractors work in the warehouse.

With **Communications**, you can use quick, template-based, automated messaging or ad-hoc messaging for responding to events within a company, organization, or government office. In the example above, you can launch a Communication to inform your contacts that they should go to a place of safety.

Alternatively, you may have a situation that does not immediately have a high impact but has the potential to develop a higher severity. For example, a tropical storm is approaching your offices in Australia. It is projected to make landfall within the next three to four days. In this case, you may want to inform your contacts, but no immediate action is required.

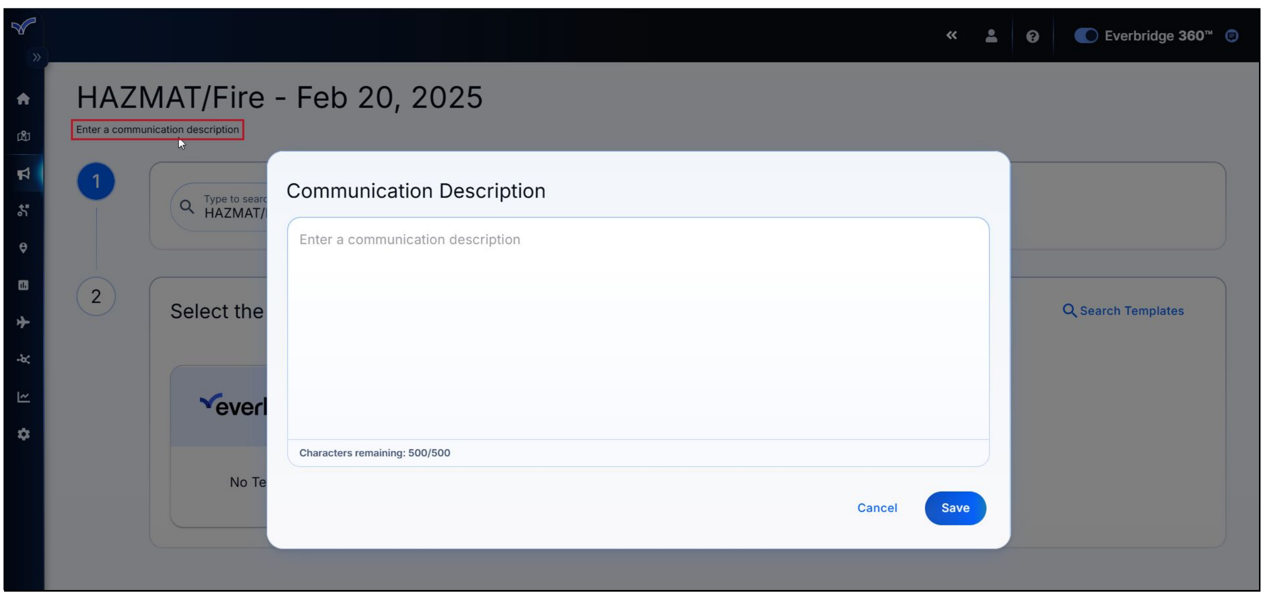
Launching a Communication from Everbridge 360™

From **Communications** in the Left Menu, click **Launch Communication**. The **Launch Communication** page is displayed.

Communications Title and Description

Everbridge will automatically suggest a title for your Communication based on the Event Type chosen in Step 1. Click the pencil icon to edit the title.

If desired, click **Enter a communication description** to add a description for your Communication.



Once a Communication is sent, the title becomes the Communication Name on the **Communications History** page. It will also become the Incident Name on the **Incidents** > **Open/History** page.

NOTE: The name of the message can contain up to 255 characters. **Communication Description** is an optional field intended for future functionality, which will contain up to 500 characters.

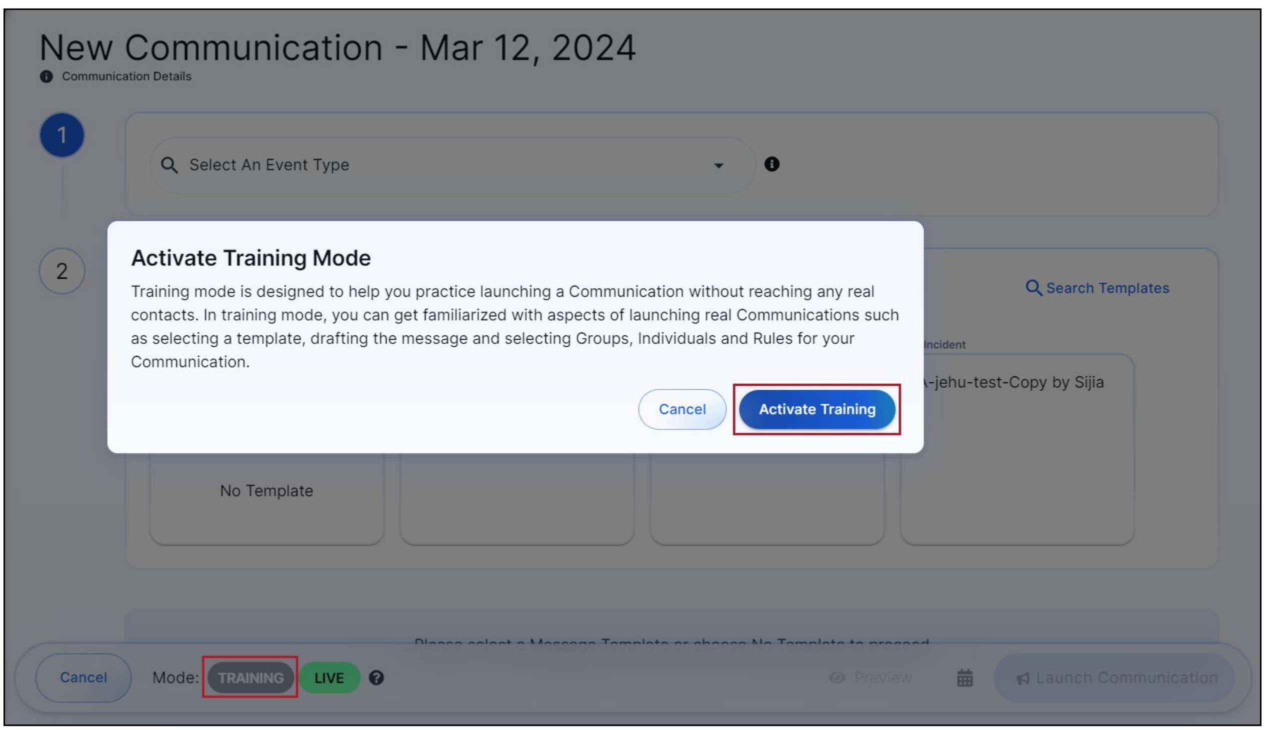
Communications Toolbar

The **Communications Toolbar** can be found at the bottom of the **Launch Communication** page and moves with it as you scroll, allowing its menu items to be accessed at any time.

NOTE: Some placeholder buttons on the Communications Toolbar will be usable in future releases.

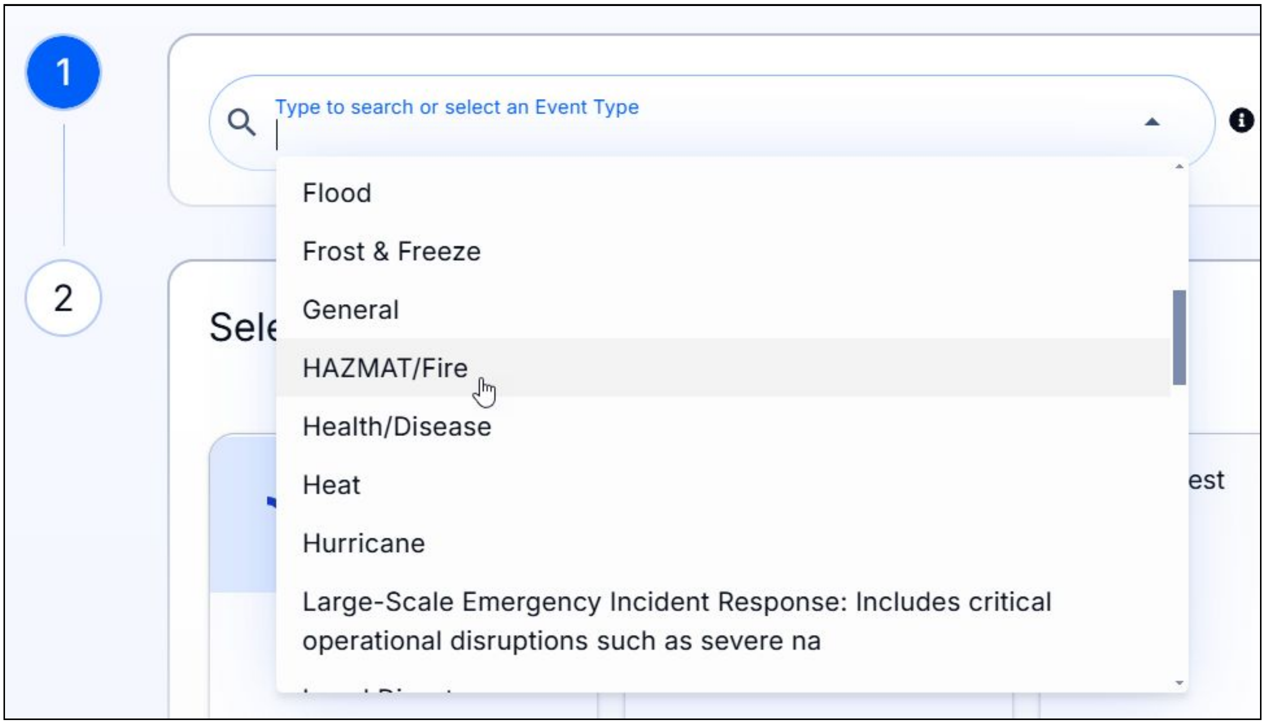
Training Mode

Training Mode allows users to practice composing and launching Communications without sending them to real contacts. They'll be identified in the **Communications History** with a textbook icon. 



Step 1: Event Type

Choose an **Event Type** from the dropdown menu that best matches the Communication being sent.



Step 2: Communication Templates and Delivery Paths

Everbridge 360™ automatically pulls from existing Notification, Incident, and Scenario templates. Communications are based on the existing Incident module, so Incident Templates work natively. Please see the following tied to Notification templates:

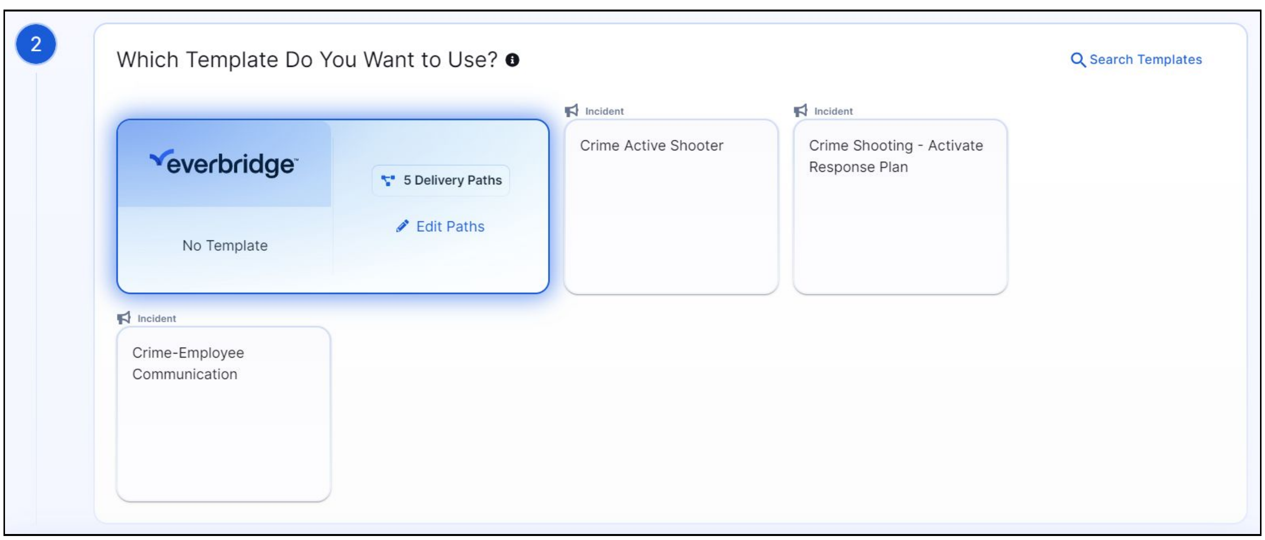
- When Everbridge 360™ is enabled for an Organization, all Notification Templates will be automatically duplicated/cloned as an Incident Template.
- The cloned Template will include the latest modifications to the Notification Template.
- The cloned Template will be deleted if the associated Notification Template is deleted.
- Naming convention for the cloned Template - <Name of Notification Template>_<Template ID>.
- Notification Templates that have the same Category name as the Incident Template Category name will be merged under the same Category when viewed under Communications.

- Notification Templates that have a different Category name will be listed under the respective Category when viewed under Communications.
- Organization Administrators and Incident Administrators will have no access to view the cloned Templates on the Incident Templates list page, thereby preventing any modifications to these Templates.

You can also send a message ad-hoc (Everbridge No Template) without a preexisting template using your Organization’s default settings and permissions. Message templates will be recommended based on the event type chosen and the name of the template containing the event name. If the template you would like to use is not automatically shown, you can search templates.

Message delivery paths for an ad-hoc Communication will default to the Organization settings but can be changed to Custom. Templates will have predefined delivery paths. You may or may not be able to change custom paths when sending a Communication.

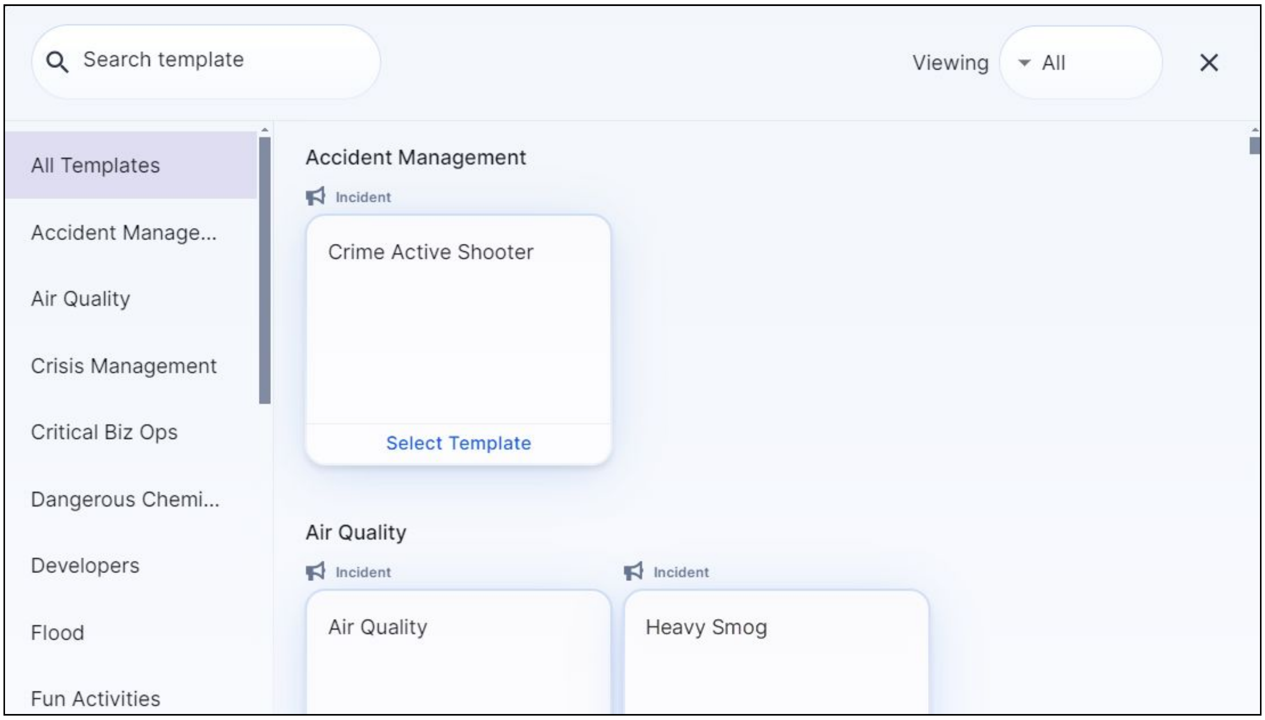
NOTE: Available delivery paths are configured by an Account or Organization Administrator under **Settings** > **Organization** > **Notifications** > **Delivery Methods**.



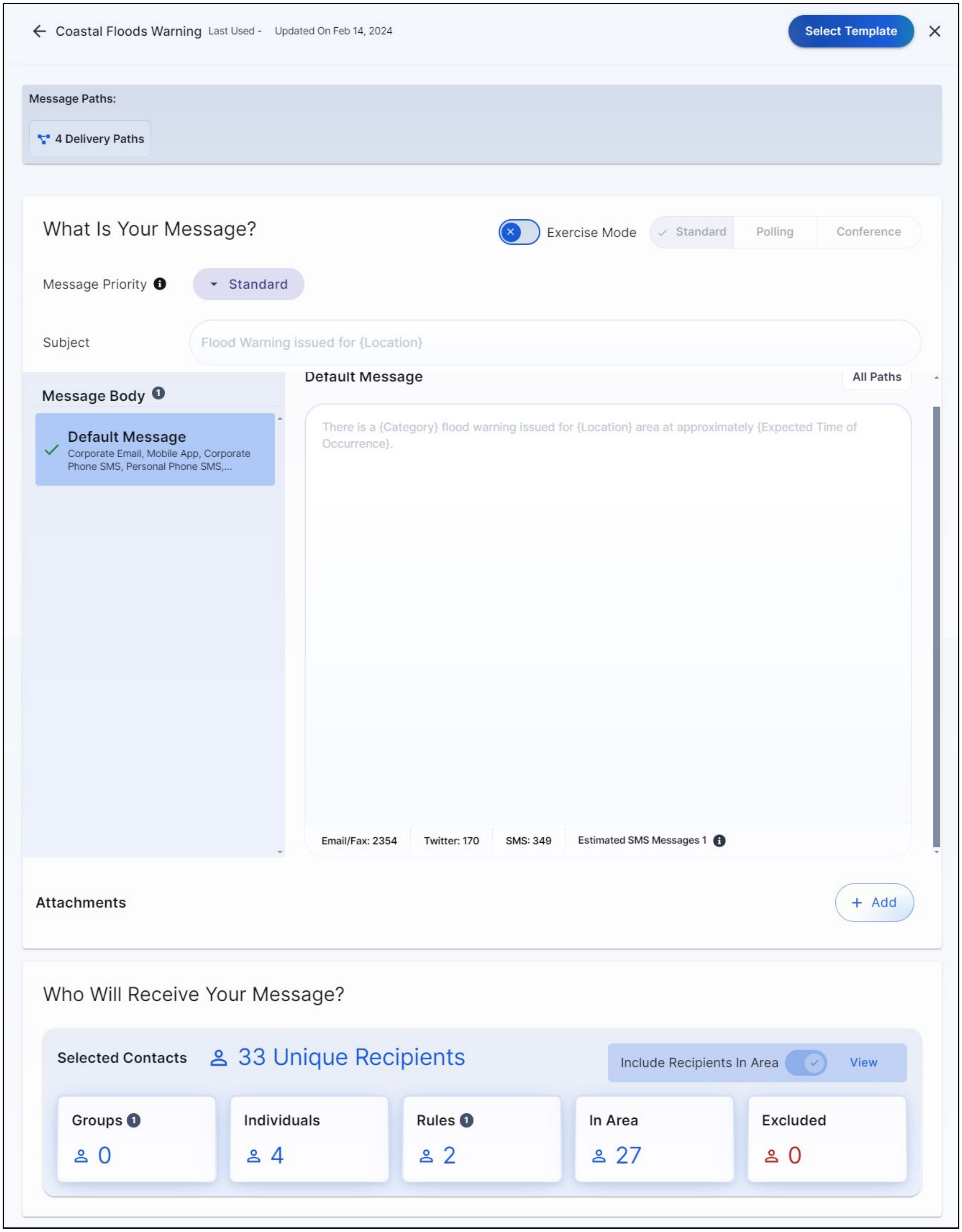
There are a few things to keep in mind when searching for templates:

- **Search Template** will display all templates that the user has access to.
- Template Categories are listed in the left navigation bar in alphabetical order.

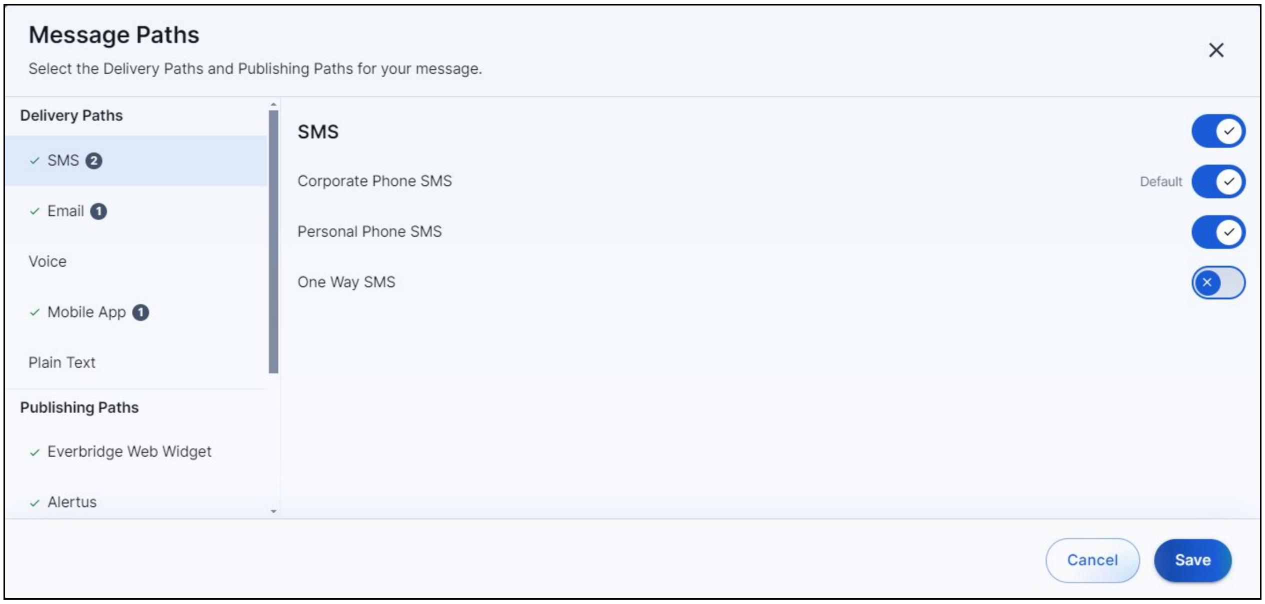
- Templates can be searched within a selected Category or from **All Templates**.
- Templates without a Category will be displayed at the bottom of the list.



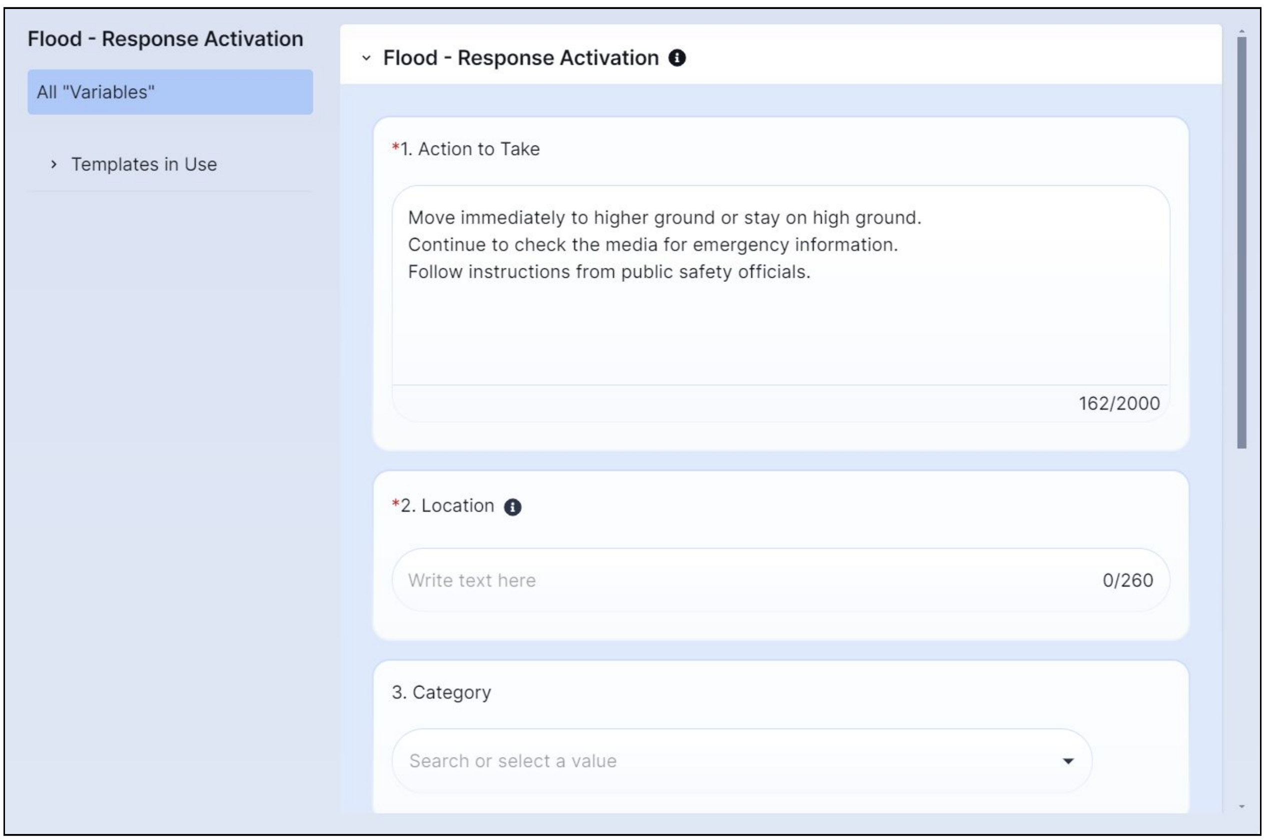
You can view the details of a template by hovering your cursor over it and clicking **View Details**. The Template Details page will appear, where you can determine if the selected template is the most appropriate for the current situation. If so, click **Select Template**.



Once a template has been selected, click **Edit Paths** to adjust the message's Delivery and Publishing Paths. Once finished, click **Save**.



If you've chosen an Incident or Scenario Template rather than a Notification Template, you can populate the information in the variable information fields of your template form.



To complete variables:

1. Complete the fields with your situation-specific information. The available fields depend on how the template has been configured by your Administrators.
    - Required fields are indicated with a red asterisk(*).
    - Fields in white are editable. Fields in gray cannot be changed.
2. Click **Apply Variables at the bottom** to use the selected values in the following sections.

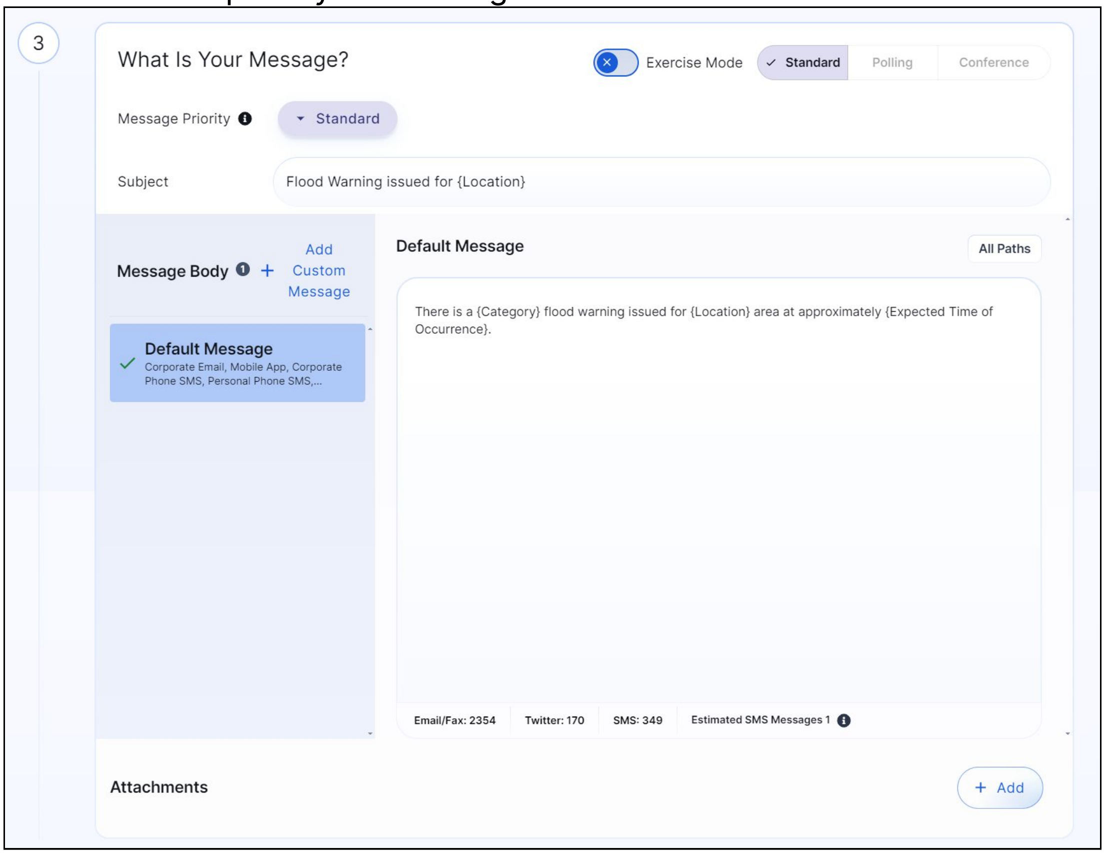
Step 3: Message Configuration

To configure your message:

1. Select a message priority if needed:
    - **Imminent Threat to Life** (if enabled for Organization) - Communications flagged with **Imminent Threat to Life** (ITL) mean the event:
        - has just occurred (for example, an earthquake, volcanic eruption, or failed life-support system), or
        - is in progress (for example, an active shooter or nuclear power plant emergency), or
        - is expected to happen today (for example, severe weather), or
        - the lives or safety of message recipients are immediately at risk.
        - (only applies to Apple/iOS devices) becomes a critical alert when the message is sent to Everbridge Mobile App. Critical alerts:
            - make an audio sound when delivered, even if your device is silent. (If your device is not on silent, the audio tone is based on your selections in app settings).
            - are displayed until you tap on it.
            - are displayed with a warning icon.
        - **An Active Shooter event** in the proximity of a recipient's location, or a life-threatening weather event are both examples of ITL situations.

          The following Communications are not typically considered Imminent Threats to Life:
            - Communications to recipients to inform them of an active shooter at another location, a weather event that will impact a different location, or a weather event that is still days away.
            - Communications sent after the initial ITL message UNLESS there is a material change from the initial Communication AND the change results in an immediate increased risk to life and safety.

    - Communications sent to recipients who are not at risk for life and safety regardless of the type of Incident.
- **High Priority** - High-priority messages are given priority in your message queue and are flagged in your recipients' inbox.
- **Standard** - No priority has been given.



    - **Exercise Mode**: Communications sent in Exercise Mode are meant to test communication plans, such as allowing recipients to practice receiving and responding to messages similar to those they'd see in a real emergency. The **[DRILL]** tag will be prepended to the message's Subject and Body so that contacts will immediately know that it's an exercise.

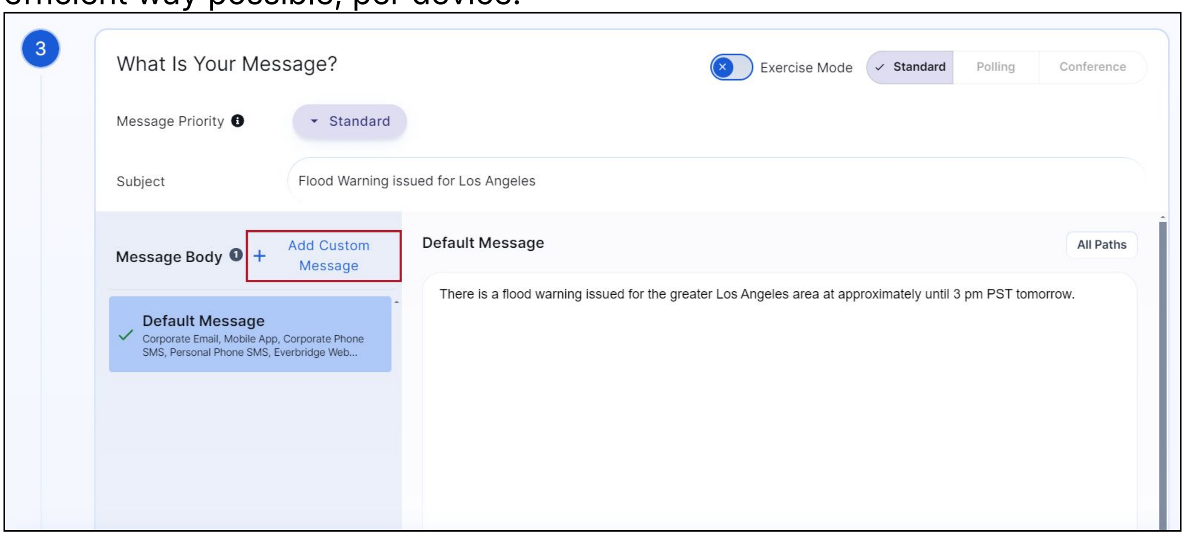
2. Specify your message type. There are three types of messages:
    - **Standard** - Standard messages are used to send communication to people through a variety of methods including voice, text, and email. Confirmations can be requested from contacts that receive standard messages. Standard Messages can be emergency messages or informational messages.
    - **Polling** - Polling messages are for sending a Communication to contacts and presenting them with a menu of responses for them to choose from. When contacts receive the message, they can reply with one of

the choices. Then users can view the responses to know each contact's answer.

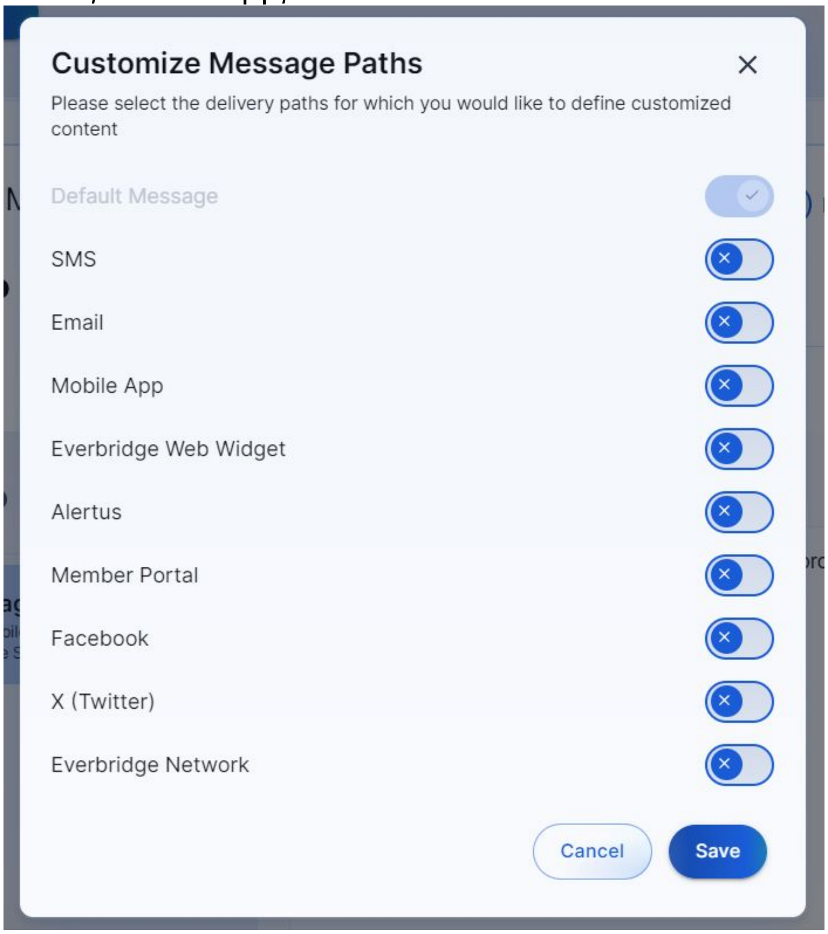
   - A polling message can have a quota associated with it. This is when not only a response is requested but a certain number of responses are needed. A quota might be for people, such as locating employees to work overtime or volunteers to staff an event

- **Conference** - Conference messages are messages that ask contacts to join a conference call. This could be an emergency where contacts need to discuss a situation immediately or it might be a convenient way to pull in a team for a weekly status meeting.

3. Add a **Subject** and your message's **Body** text. The body field can accommodate 2500 characters for Email/Fax, and 459 characters for SMS.
   - The subject of your message will be automatically configured based on the event type chosen. In the **Subject** field, you can amend the title of your message.
4. Click **Add Custom Message** to add a message to the previously selected Message Paths for the Communication. Everbridge recommends you always send custom messages per delivery method, if possible. This helps to avoid message fatigue and enables contacts to consume messages in the most efficient way possible, per device.

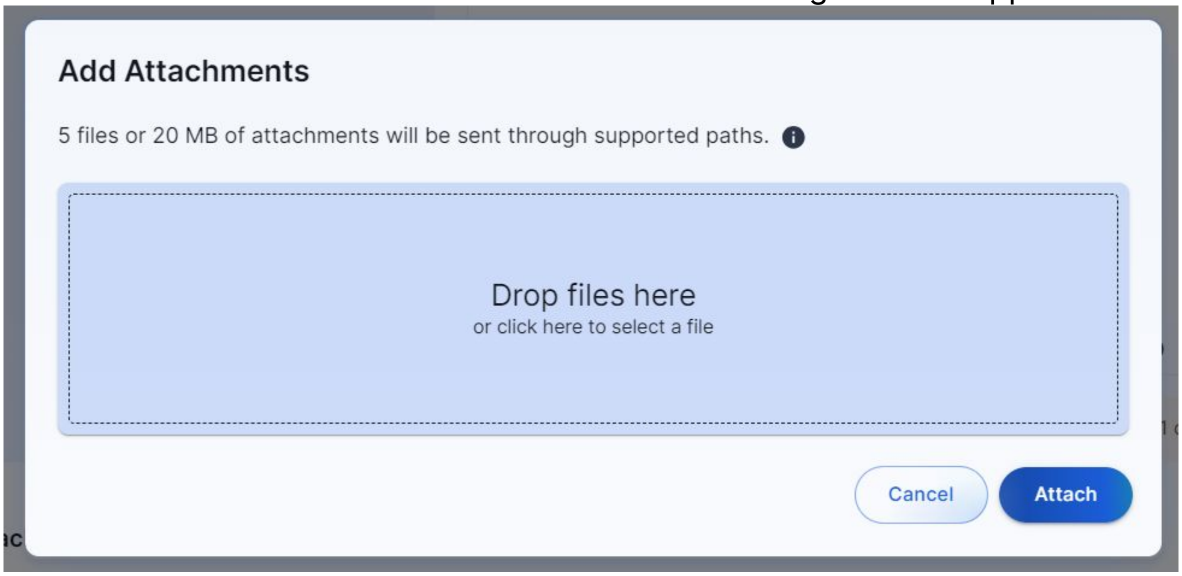


When adding a custom **message path** you can use the same text for all your delivery methods, or you can choose to have separate text for SMS, Email, Voice, Mobile App, and Plain Text.



5. Select **Add** under the **Attachments** section at the end of Step 3 to attach up to five files to a message. The maximum file size is 20 MB. If an attachment is more than 20 MB, it will be sent as a link in the Communication. Each filename should be no more than 80 characters. You can attach files if the

Communication is to be sent via email or the Everbridge Mobile App.



Step 4: Recipient Management

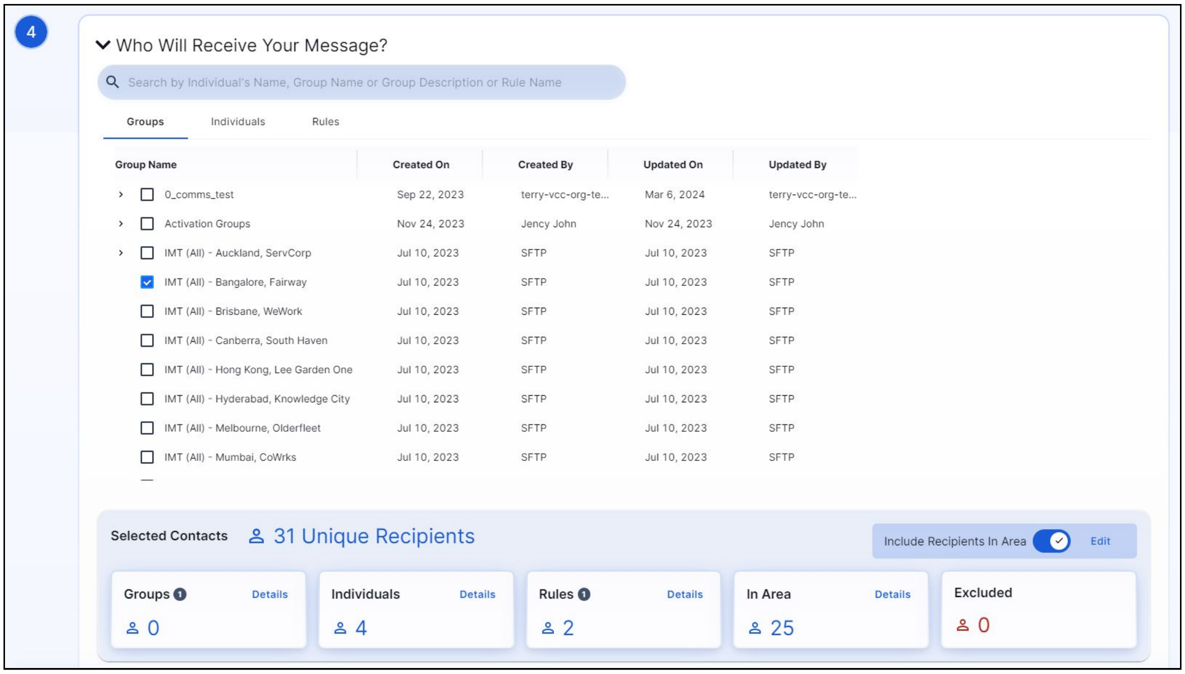
Groups, Individuals, Rules, and Recipients in the Area may be prefilled based on the template chosen and the alert for users launching a Communication from Visual Command Center.

NOTE: Logic for Recipients in the Area:

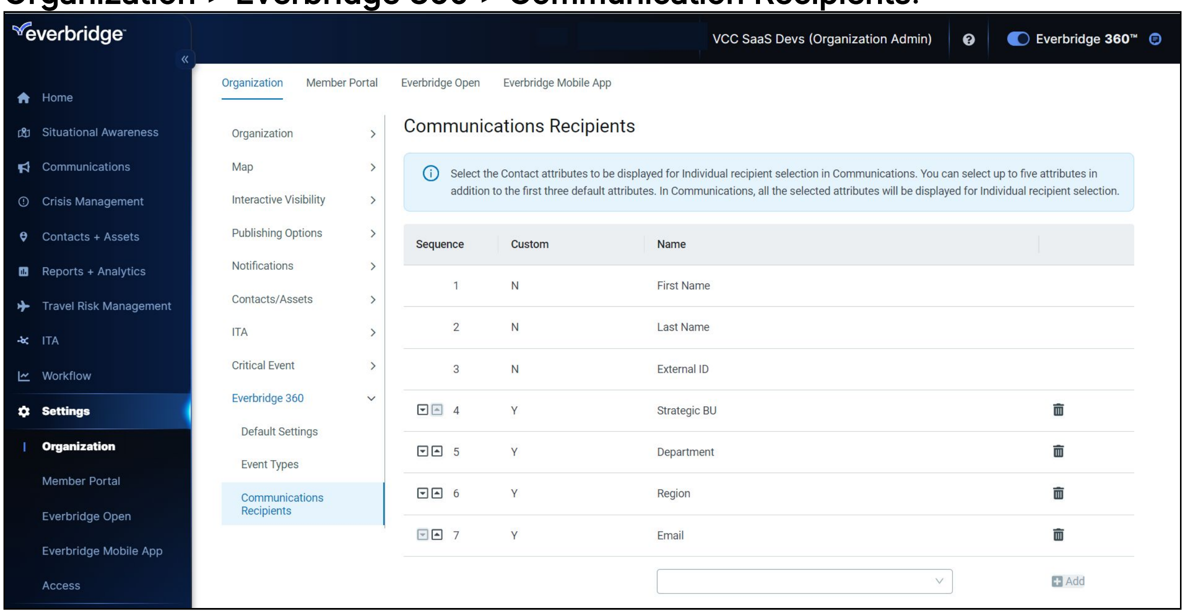
From a VCC Alert - Contacts within the specified Map/Polygon of the selected Template, as well as Contacts within the Polygon of the Alert itself.

Without an Alert - Contacts within the Map/Polygon of the selected Template (if it contains a Map/Polygon).

1. Under **Who Will Receive Your Message?**, you can configure who you want to send a Communication to. A Communication may already have some predefined contacts. However, in the moment and if permitted, you may want to add more contacts to a Communication depending on the situation. Depending on your requirements, select the individuals and groups you want to send the Communication to.

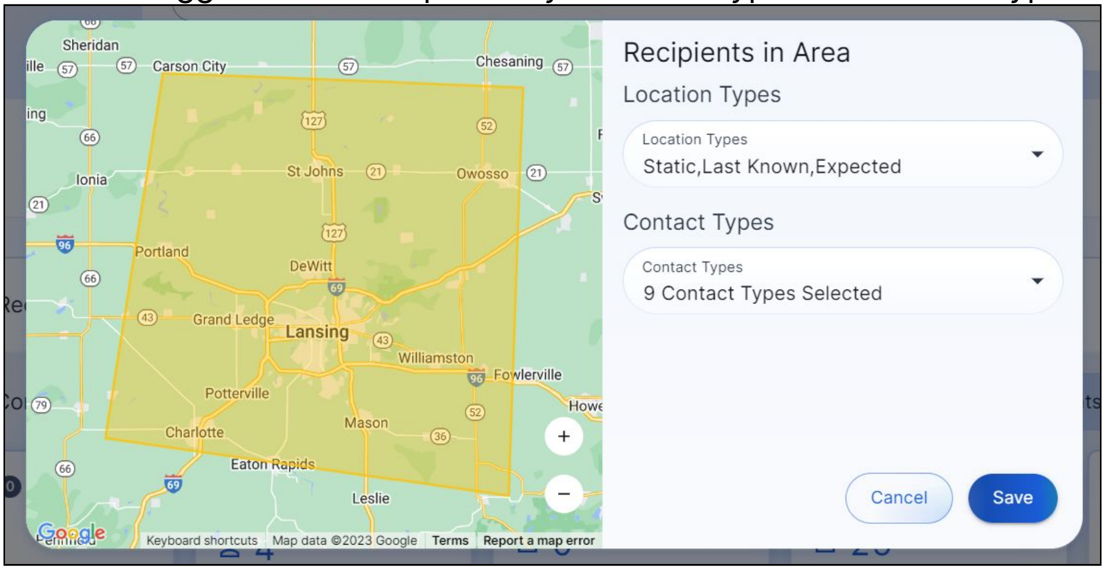


Note that the available data columns present on the **Individuals** tab of the recipient-picker are determined by the choices specified under **Settings** > **Organization** > **Everbridge 360** > **Communication Recipients**.



- **Groups** - Click **Groups** to select groups your Organization has created.
- **Individuals** - Click **Individuals** to select individuals by name.
- **Rules** - Click **Rules** to apply rules that your Organization has defined to select contacts with certain attributes. Rules are preconfigured by your Incident Administrator.
- **Recipients in Area** - Recipients that have been impacted by an alert will be added for communication. Click **Edit** next to the Include Recipients in

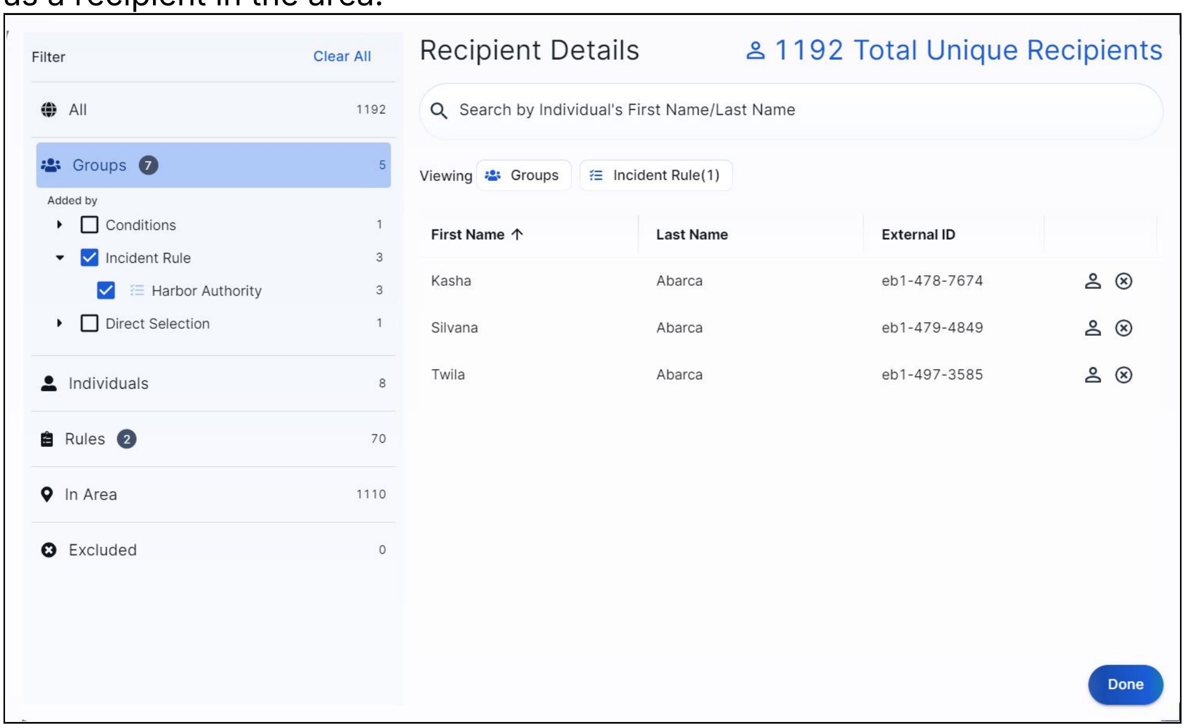
this Area toggle to filter recipients by Location Type and Contact Type.



These can be filtered by location type:

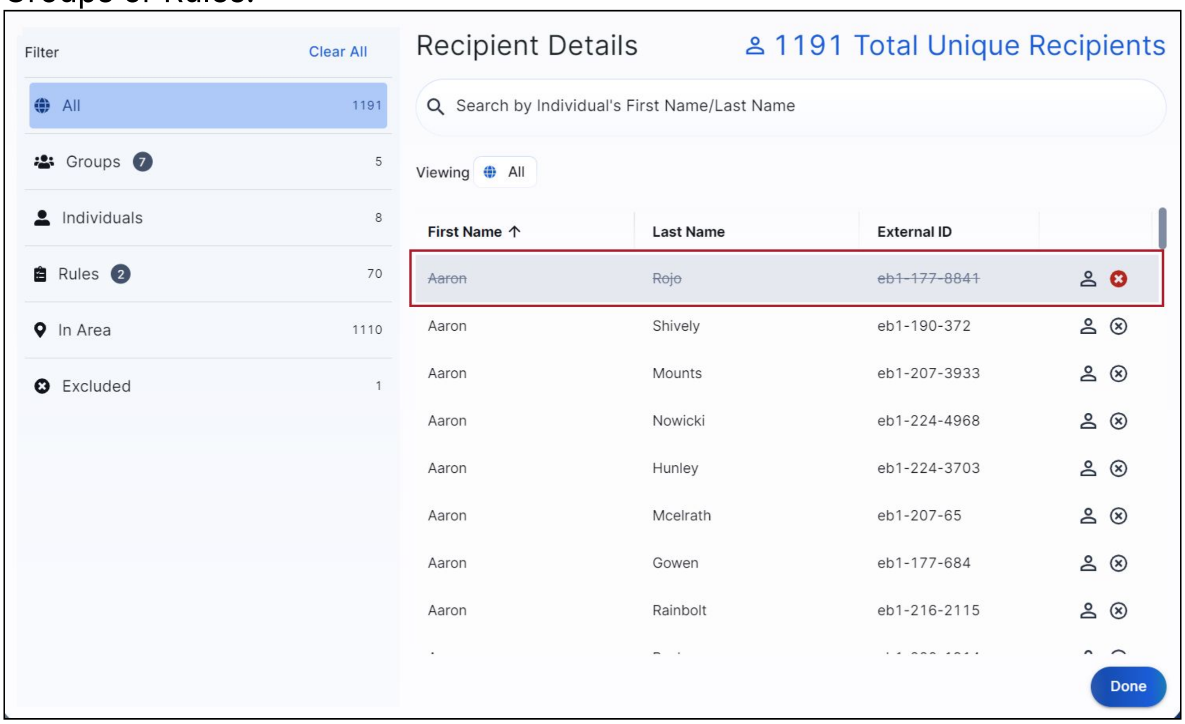
- Static
- Last Known
- Expected (includes Travel) locations
- Contact record type

2. Clicking the count of unique recipients allows you to see all recipients that have been added via Groups, Individuals, Rules, Incident Rules, Conditions or as a recipient in the area.



Click the **person** icon to see how a specific contact was included (via Groups, Incident Rules, Conditions, etc.).

Click the **X** icon to remove recipients from Communication without impacting Groups or Rules.



3. Click **Done** to finish setting the Recipients.

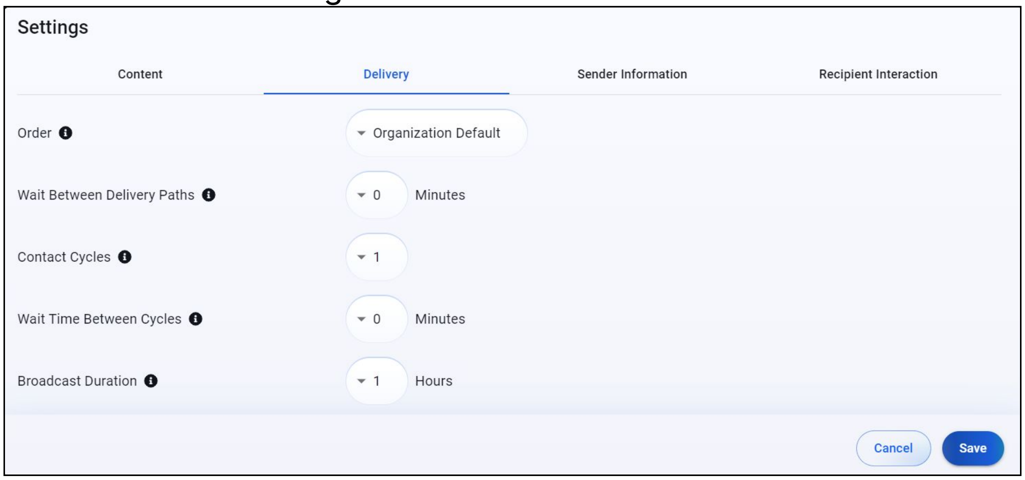
Step 5: Settings

1. Click the **Settings** cog icon on the **Communications Toolbar** to configure the message settings, which allow you to adjust different options to optimize your message.
    - **Content** - The language setting for communication that dictates the language in which contacts receive voice and email prompts. This setting does not translate any text entered in the title or body of a

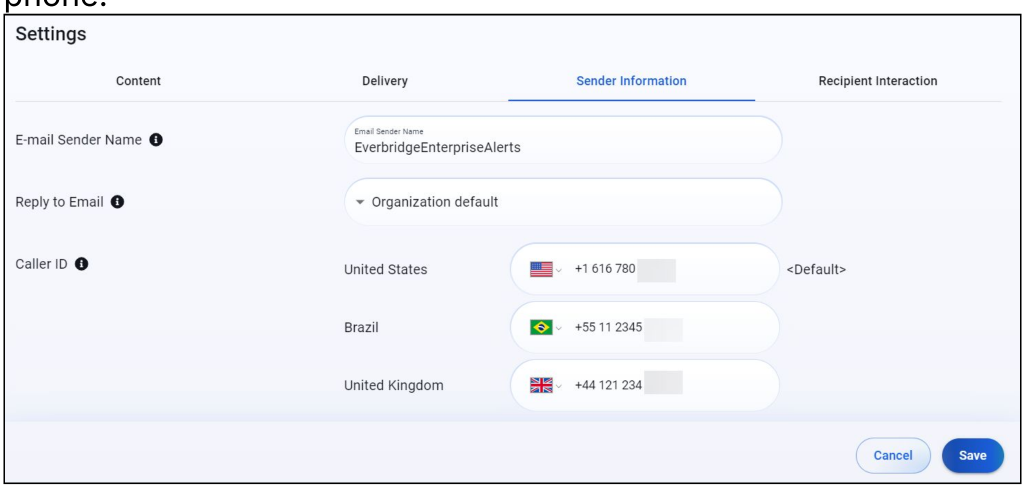
communication, nor does it translate the text-to-speech message. However, the text-to-speech message will be read using the selected language's accent.

- **Delivery**
  - **Order** - There are three different delivery order modes in Everbridge Suite settings:
    - **Organization Default** - Uses the sequence specified in the organization's settings tab for notification delivery methods,
    - **Contact Preferred** - Uses the sequence specified in each contact's record,
    - **One-Time Custom** - Uses the sequence specified at a notification's creation, and overrides all other preferences.
  - **Wait Between Delivery Paths** - Controls how long the system waits before moving on to the next delivery method for a contact.
  - **Contact Cycles** - Controls how many times Everbridge attempts to deliver the message across all of the device types for the contact.
  - **Wait Time Between Cycles** - Controls how long the system waits before starting another cycle of Communication.

  - **Broadcast Duration** - Controls how long the Communication is active to send messages and receive confirmations.

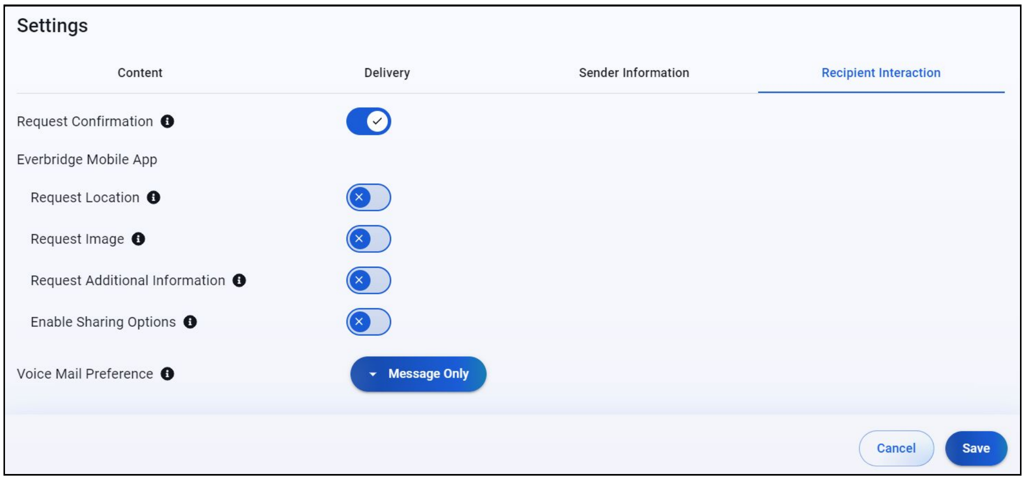


- **Sender Information** - Specify the following information:
  - **Email Sender Name** - Allows you to change the address to something that is recognizable to the contacts, so they are more likely to open it.
  - **Reply to Email** - Allows you to set a custom email that your contacts can reply to for more information.
  - **Caller ID** - Allows you to change the phone number that your contacts see displayed when they receive a Communication via phone.



- **Recipient Action** - Configure the below options:
  - **Request Confirmation** - Allows you to request that your contacts confirm that they have received the message. It also stops any further attempts to reach contacts.
  - **Everbridge Mobile App** - Allows you to control various settings related specifically to the Everbridge Mobile App, such as:
    - Request Location

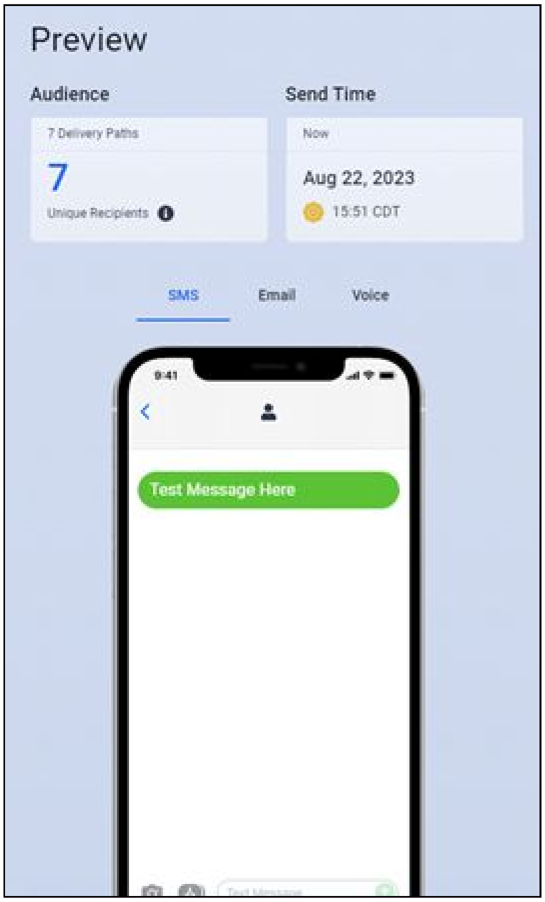
        - Request Image
        - Request Additional Information
        - Enable Sharing Options
    - **Voicemail Preference** - Controls what Everbridge does when leaving a voice message. You can select whether to end the call, leave a message, or leave a message with call-back information to confirm that it was received.



Step 6: Preview and Send

1. Click **Preview** on the **Communications Toolbar** to review SMS, Email, Voice, Mobile App, and Plain Text delivery paths before sending with the context of the number of recipients, send time, and whether the message is being sent during the day or night. **Voice** is a recording that can be listened to prior to

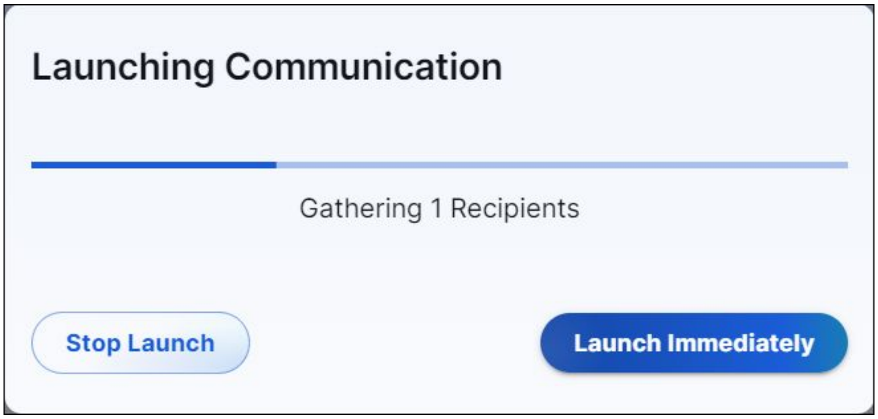
launch.



2. Once all required fields have been completed and variables have been applied, the **Launch Communication** button on the **Communication Toolbar** will turn blue to enable sending the Communication. Click it to start the launch.

3. The **Launching Communication** modal will appear with two options:
   1. **Stop Communication** - This allows the user to pause the launch and return to the previous screen to correct any possible errors.

2. **Launch Immediately** - Launches the Communication and closes the modal.



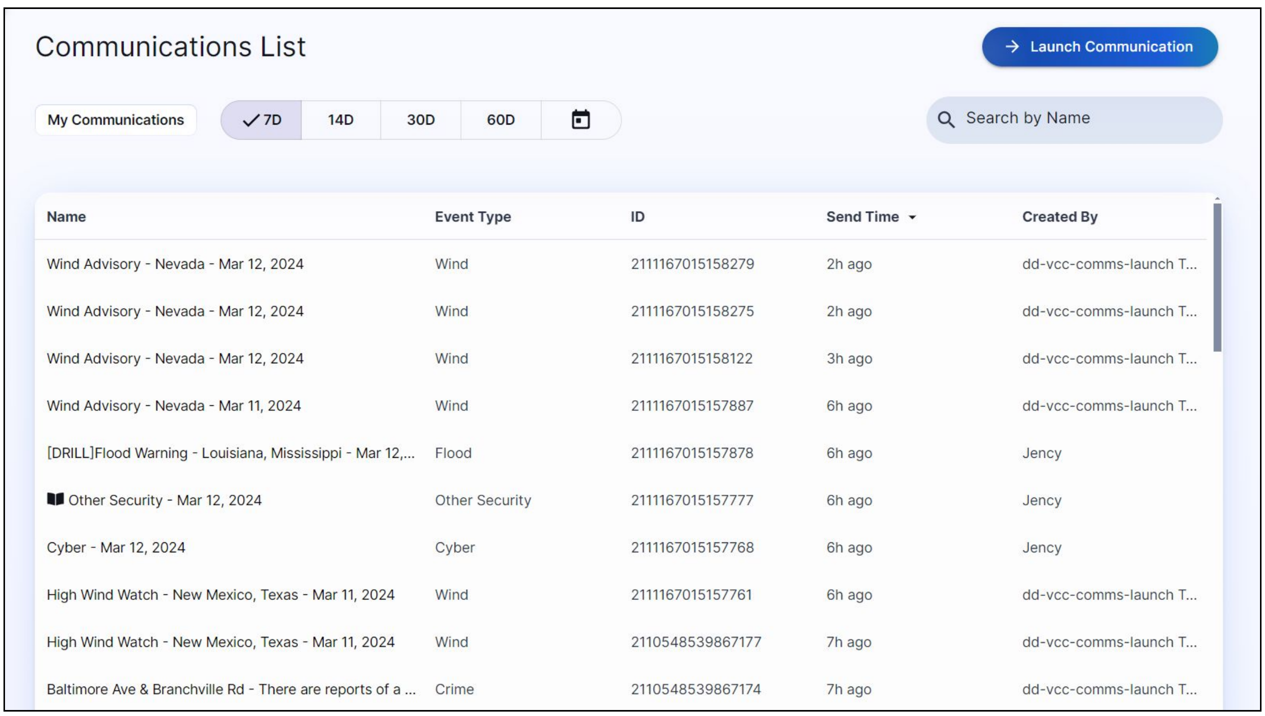
- **NOTE**: If neither option is selected, the Communication will automatically launch after the modal times out.

Communication List

The **Communications List** page found under **Communications** > **Communication List** contains all messages sent via Communications (Notifications, Incidents, and Scenarios).

Click **Launch Communication** to start creating a Communication from scratch or a template. For more on that process, see Launching a Communication from Everbridge 360.

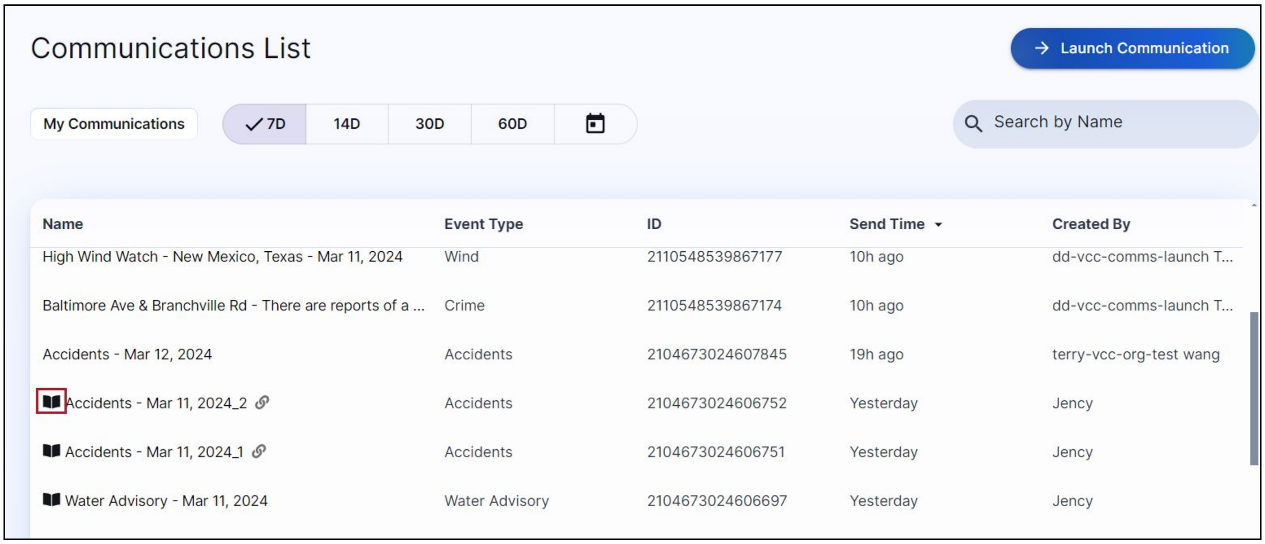
> **NOTE:** Communications are sent using Incident functionality, so all Communications will also be displayed under **Incidents – Open/History** with all functionality intact.



Name	Event Type	ID	Send Time	Created By
Wind Advisory - Nevada - Mar 12, 2024	Wind	2111167015158279	2h ago	dd-vcc-comms-launch T...
Wind Advisory - Nevada - Mar 12, 2024	Wind	2111167015158275	2h ago	dd-vcc-comms-launch T...
Wind Advisory - Nevada - Mar 12, 2024	Wind	2111167015158122	3h ago	dd-vcc-comms-launch T...
Wind Advisory - Nevada - Mar 11, 2024	Wind	2111167015157887	6h ago	dd-vcc-comms-launch T...
[DRILL]Flood Warning - Louisiana, Mississippi - Mar 12,...	Flood	2111167015157878	6h ago	Jency
Other Security - Mar 12, 2024	Other Security	2111167015157777	6h ago	Jency
Cyber - Mar 12, 2024	Cyber	2111167015157768	6h ago	Jency
High Wind Watch - New Mexico, Texas - Mar 11, 2024	Wind	2111167015157761	6h ago	dd-vcc-comms-launch T...
High Wind Watch - New Mexico, Texas - Mar 11, 2024	Wind	2110548539867177	7h ago	dd-vcc-comms-launch T...
Baltimore Ave & Branchville Rd - There are reports of a ...	Crime	2110548539867174	7h ago	dd-vcc-comms-launch T...

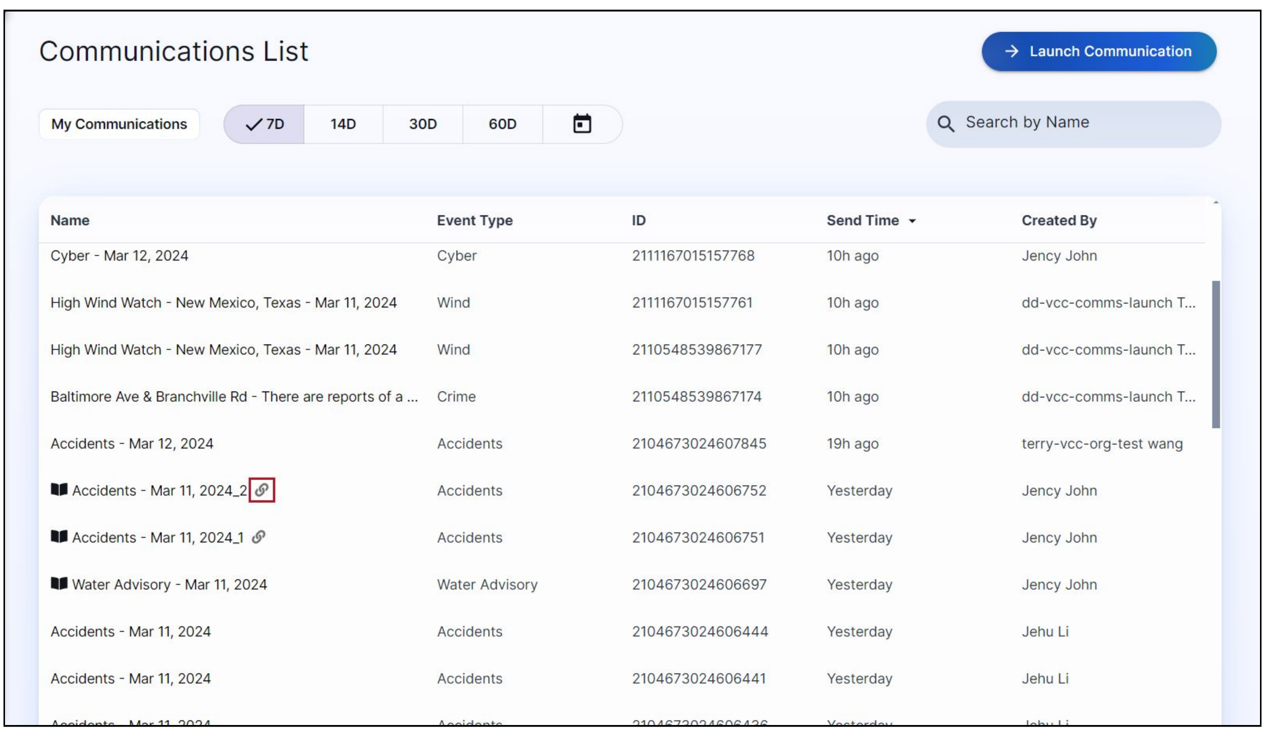
Communications from within the last 7 days are automatically displayed but can be expanded to include 14 days, 30 days, 60 days, or a specified date. You can also search for a Communication by its **Name**, while sorting can be done by **Name**, **Event Type**, **ID**, **Send Time**, and **Created By**.

Communications accompanied by the textbook icon were launched in Training Mode.

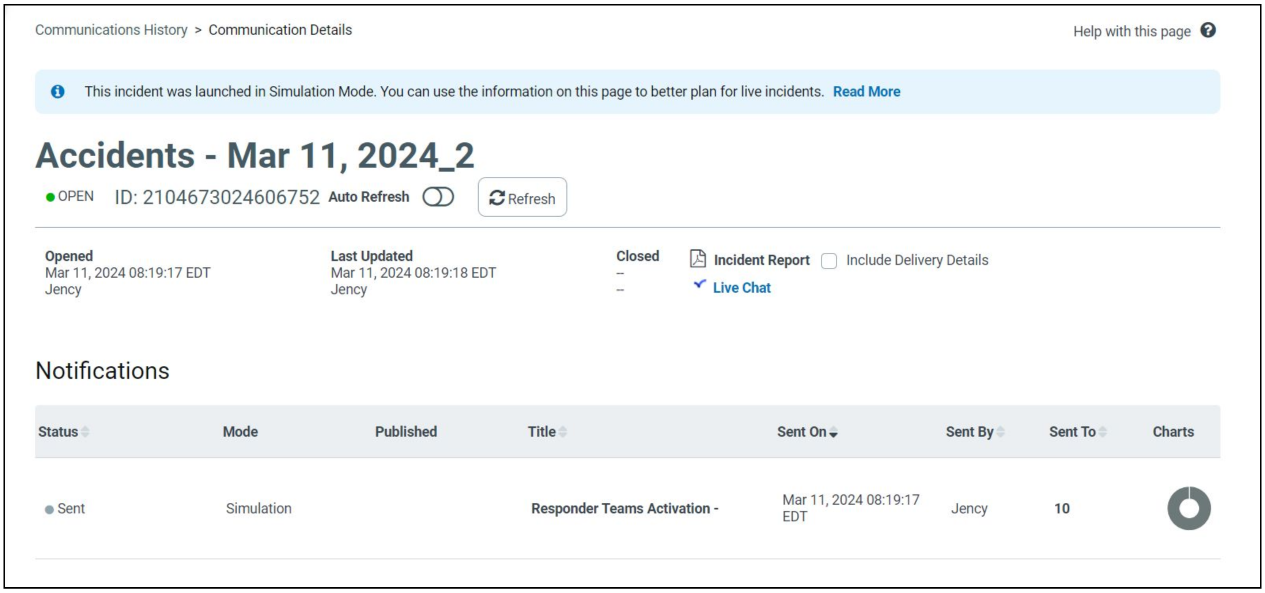


Scenario Template Usage

If a Communication was launched from a Scenario Template, a link icon will be present next to its name in the list.



Clicking on the name of the Communication will take you to the **Communication Details** page, where you can see details of responses and download the Incident report, including delivery details.


Communications History > Communication Details
Help with this page
This incident was launched in Simulation Mode. You can use the information on this page to better plan for live incidents. Read More
Accidents - Mar 11, 2024_2
OPEN
ID: 2104673024606752
Auto Refresh
Refresh
Opened
Mar 11, 2024 08:19:17 EDT
Jency
Last Updated
Mar 11, 2024 08:19:18 EDT
Jency
Closed
Incident Report
Include Delivery Details
Live Chat
Notifications
Status
Mode
Published
Title
Sent On
Sent By
Sent To
Charts
Sent
Simulation
Responder Teams Activation -
Mar 11, 2024 08:19:17 EDT
Jency
10

Rich Text Editor Best Practices for Custom Delivery Paths

Although the toolbar to configure custom text appears similar to those in standard word processing applications, be aware that it offers minimal functionality compared to the formatting tools available in applications such as Microsoft Word.

When pasting content into **Email, Everbridge Mobile App**, Everbridge Suite may not produce the same results as in the external source.

- Content copied from Microsoft Office may not produce the same results as in Microsoft Office.
- Not all content copied from Web pages may be preserved in the original format if the source uses custom or proprietary HTML tags.
- Not all fonts, bullets, numbering, and indentation are supported when pasting content.

Other considerations include:

- The maximum amount of content that can be saved and used in the **Email, Everbridge Mobile App** field is 1 MB; Everbridge Suite does not currently display a character or content counter. You see a message only when you have more than 1 MB of content when you attempt to Launch Communication. (Image file sizes are excluded from the maximum Custom Email content size of 1 MB.)
- If your Organization uses a custom email header and footer (set in **Settings** > **Organization** > **Notification** > **Email Header and Footer**), then do not include a header and footer in the email. The Everbridge Suite application automatically inserts your custom header and footer when sending an email message.

Using Images

Although you can copy and paste images from an external source (except Microsoft Word), Everbridge recommends you use **Insert/Edit image** from the formatting toolbar for the best results. You can either:

- Enter a URL address to retrieve an image from an Internet-accessible server.
- Choose a file from your computing device.

To do this:

1. Select **Insert/edit image**.
2. Do one of the following:

- **General** - Fill in the information fields.
- **Upload** - Drag and drop the image onto the window or browse for the image.

3. Click **Save**.

Using Tables

The most straightforward way to enter a table is to copy and paste from an external source, such as Microsoft Word. From the external source, make sure that the table column widths are the desired size because they cannot be resized once the table is pasted into the **Email, Everbridge Mobile App** pane. Alternatively, insert a table directly.

1. Place the mouse cursor where you want the table.
2. Select **Table**.
3. Select the cells (columns and rows) of your table.
4. Click the table to display the properties you can change. You can also make the same changes by clicking **Table** again.

Converting Text to HTML

Converting your text to HTML gives you the ability to change the format of text and gives you greater control over the format of your text quickly and easily.

1. Using the **Email, Everbridge Mobile App** pane, enter your text.
2. Click **< >**. The **Source Code** dialog displays your text in HTML.
3. Click **Save**.

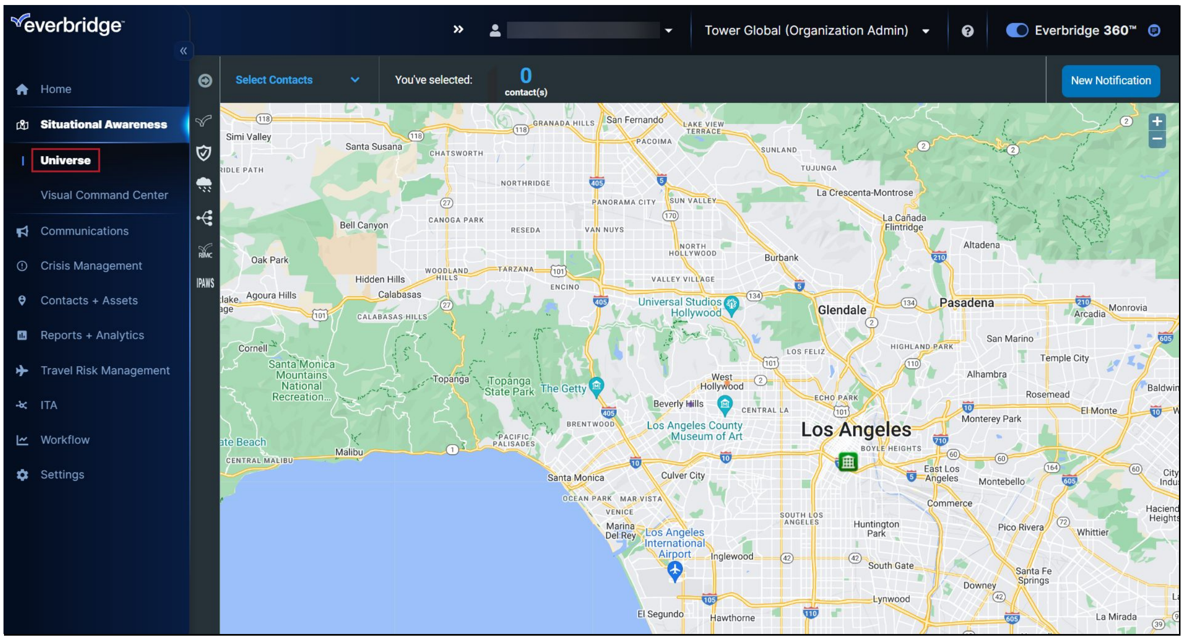
Copying Content Without Characters or Formatting

If you do not want hidden characters or formatted text in your custom email when you copy/paste from an external source, select **Paste as Text**.

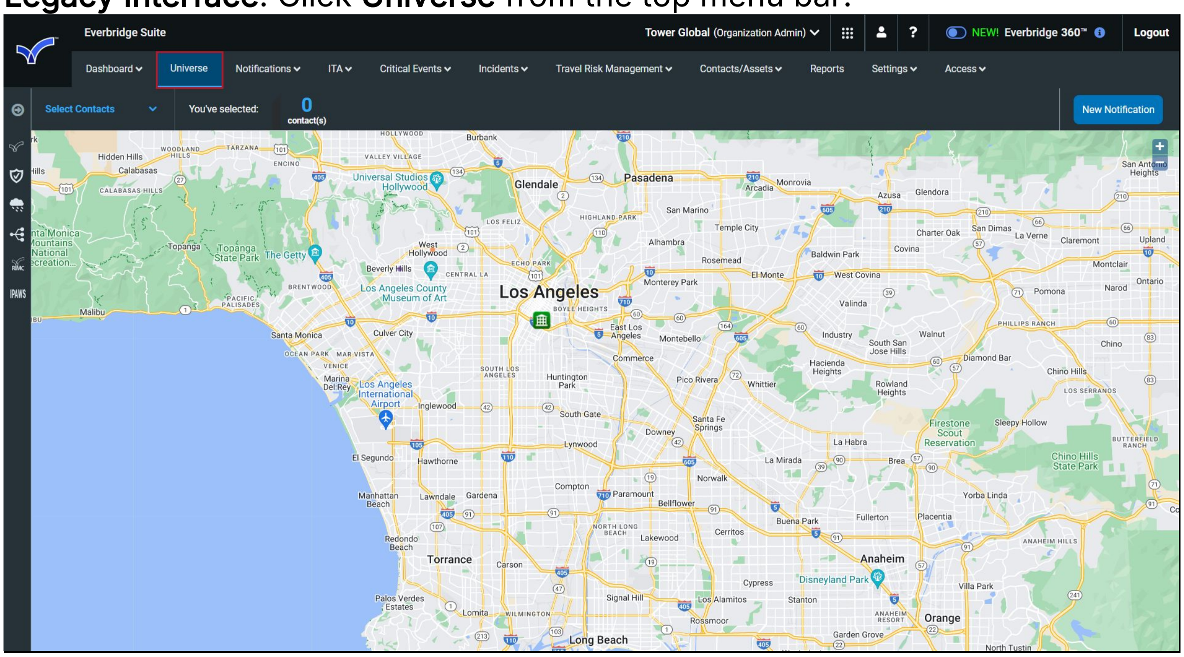
Overview of the Universe

The default map location appears when clicking the **Universe** tab, which serves as your virtual workspace. It can be found:

- **Everbridge 360 Interface**: Click **Situational Awareness** > **Universe** from the sidebar on the left.



- **Legacy Interface**: Click **Universe** from the top menu bar.



From Universe, users can:

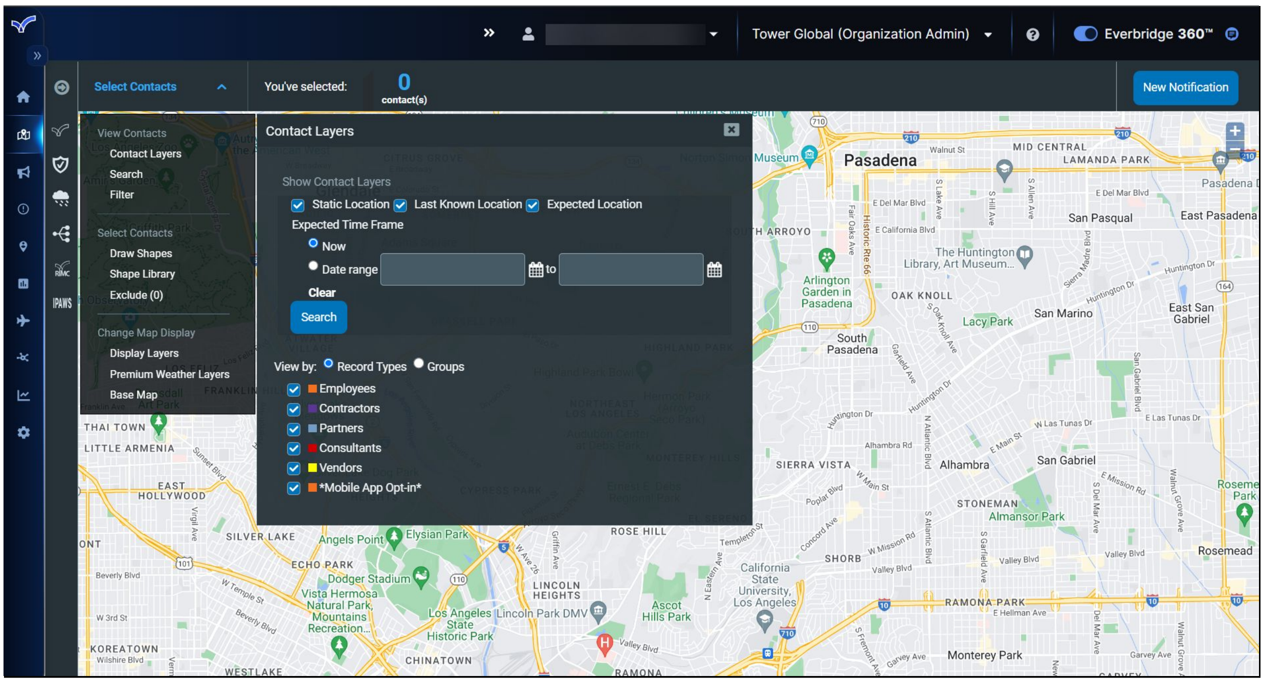
- Send Notifications

- View contacts from the map
- See messages from the Safety, Weather, and Everbridge Network feeds, among others, using widgets

You can find contacts using the **Select Contacts** drop-down menu, or see existing contact information by clicking a Contact symbol (a dot) on the map. See View Contacts for more details.

View Contacts

Contact layers display potential message recipients in the Universe. The contact layers depend on your Organization. The contacts are uploaded, or the contact records are added manually or through the Member Portal by citizens who opt-in for Notification. Any record with a geocoded address is loaded in the contact layer.



> **NOTE:** Some contact layers are specific to certain Everbridge products, such as [Travel Protector]() or [Safety Connection]().

Selecting Contacts via Contact Layers

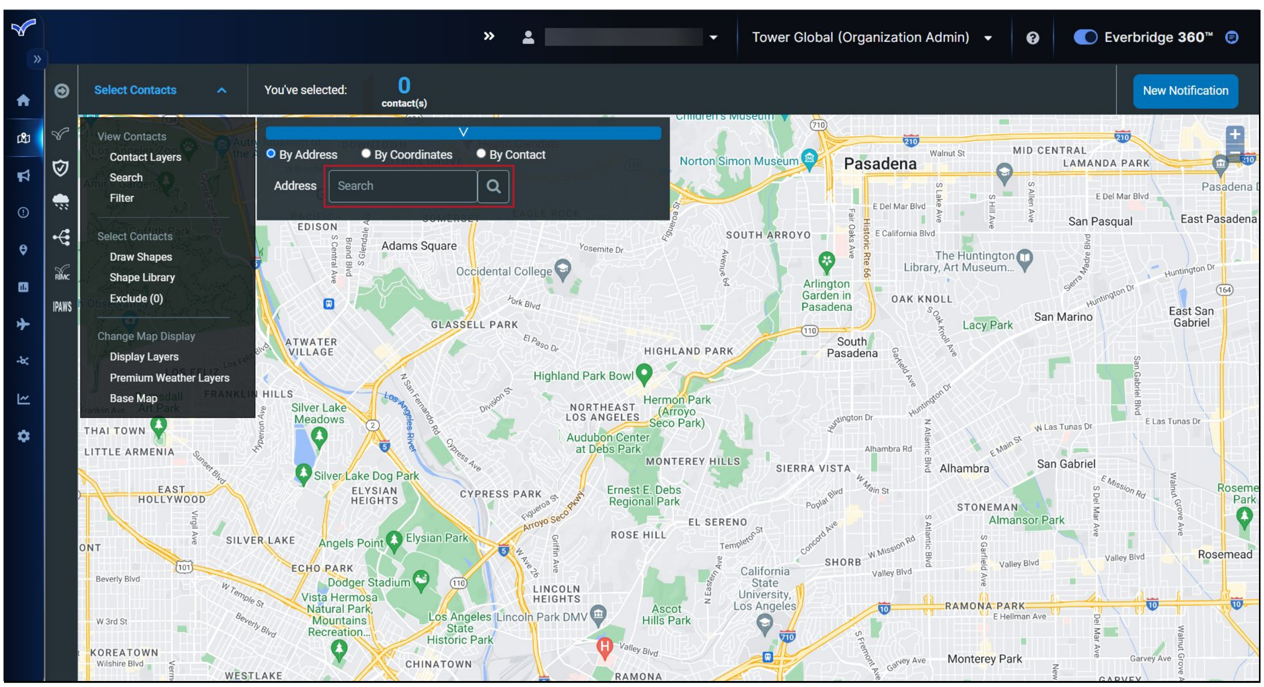
To select contacts with contact layers in Universe:

1. Click **Contact Layers** from the **Select Contacts** drop-down list. The **Contact Layers** dialog is displayed. The items you see in the **Contacts Layer** dialog are determined by the permissions granted to your role in the Organization, as well as how the contacts in your Organization have been configured. The names of the items are custom to your Organization.
2. You can select contact layers in a Static Location, a Last Known Location, and/or an Expected Location. If you selected Expected Location, also enter an Expected Time Frame: Now or a Date Range. The maximum Date Range is 3 months.

3. You can view the contacts by Record Types or Groups.
   - **Record Types** - If the checkbox is selected, the contacts from a contact layer are indicated on the map by the color preceding the contact layer name. Clearing the checkbox removes the contacts from the map.
   - **Groups** - Specific Contacts have contact layers for groups and dynamic groups. Administrators assign contacts to groups by name and maintain the list of contacts who are in a particular group. Administrators create dynamic groups by configuring filters that automatically select contacts with certain characteristics. If groups are nested, select the + sign next to the desired group name.
4. Select the desired **Contact Layers** checkboxes. The contacts in the selected contact layers are displayed on the map. Clear the checkboxes to remove contact layers.
5. Use shapes to select contacts for the Notification once the contact layers are displayed.

Using Search from the Map

The **Search** feature in the Universe is for locating the reference for the event. You can search by address or by contact name. When the search results are displayed, you can choose to show them on the map. The **Search** feature is case-insensitive.



Searching by Address

Note the following when searching By Address:

- The address does not need to be in your Contacts database because the Search is not.
- Be precise for geocoding.
- Other than a specific street address, you can search the following:
    - **Points of Interest** (such as landmarks) - Type the landmark name. For example, **Disneyland**, where you select the address from the Search results.
    - **Intersections** - Type street intersections. For example, **N Brand Blvd and E Lexington Dr,** where you select the address from the Search results.
    - Postcode - Type the postcode for the country you are searching.
        - In Great Britain, type the postcode (between 5 and 7 alphanumeric characters with a space before the last 3 alphanumeric characters). For example, **EC1Y 8SY**.
        - In the United States, first type the words **ZIP code**, then the actual 5-digit postal code. For example, **ZIP code 91203**. If you type only the 5-digit postal code, the search can find matching postcodes in different countries.

Select one of the results, then select the **Show on Map** button if you are satisfied.

NOTE: Everbridge does not provide shapes for postal codes.

Searching by Coordinates

Note the following when searching by Coordinates:

- Searches your Contacts database.
- The Search retrieves only the records by Latitude and Longitude so you can set a marker or draw a radius.

Searching by Contact

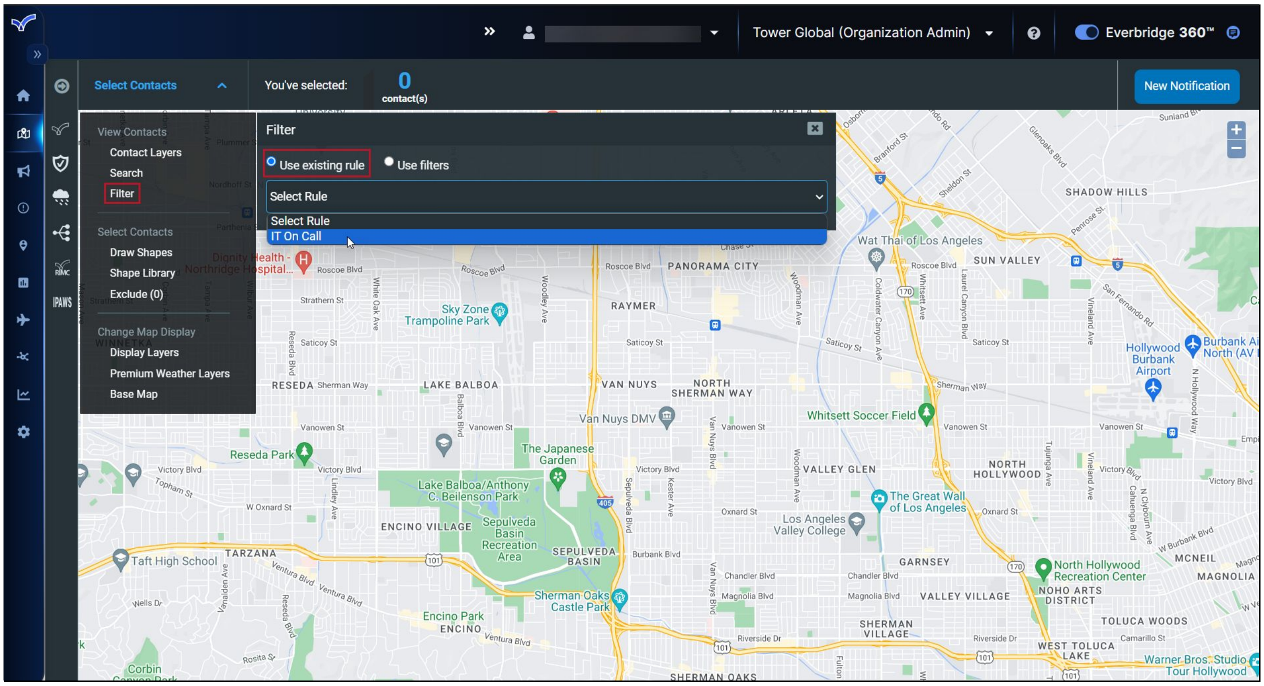
Note the following when searching by Contact:

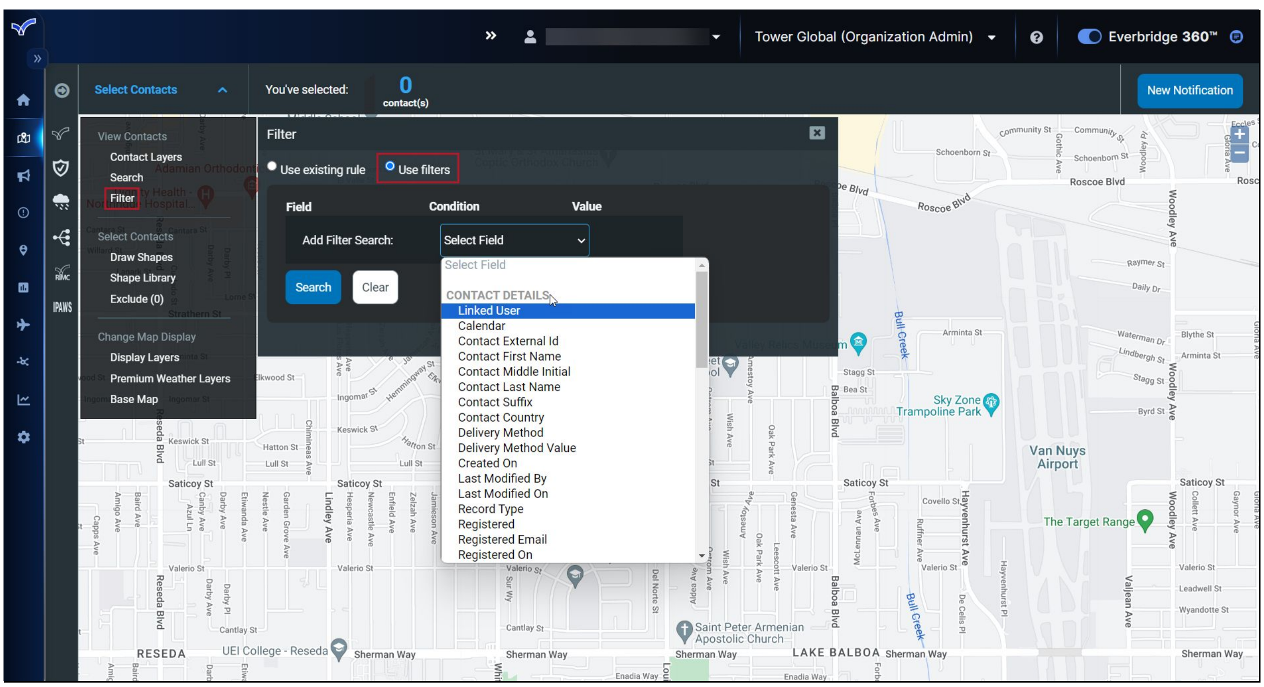
- Searches your Contacts database.
- The Search retrieves only the records that have a geocoded address (because you are in the Universe view).
- If your Contacts database includes all fire stations in Glendale, CA, for example, you could search for them (all fire stations in Glendale, CA) by Filter Contacts > Use filters.
    - Select the Location Name field, Contains condition, and type **Fire** in the Value text field.
    - Select the City field, Equal to condition, and type **Glendale** in the Value text field.

- Click **Search**.

Filter

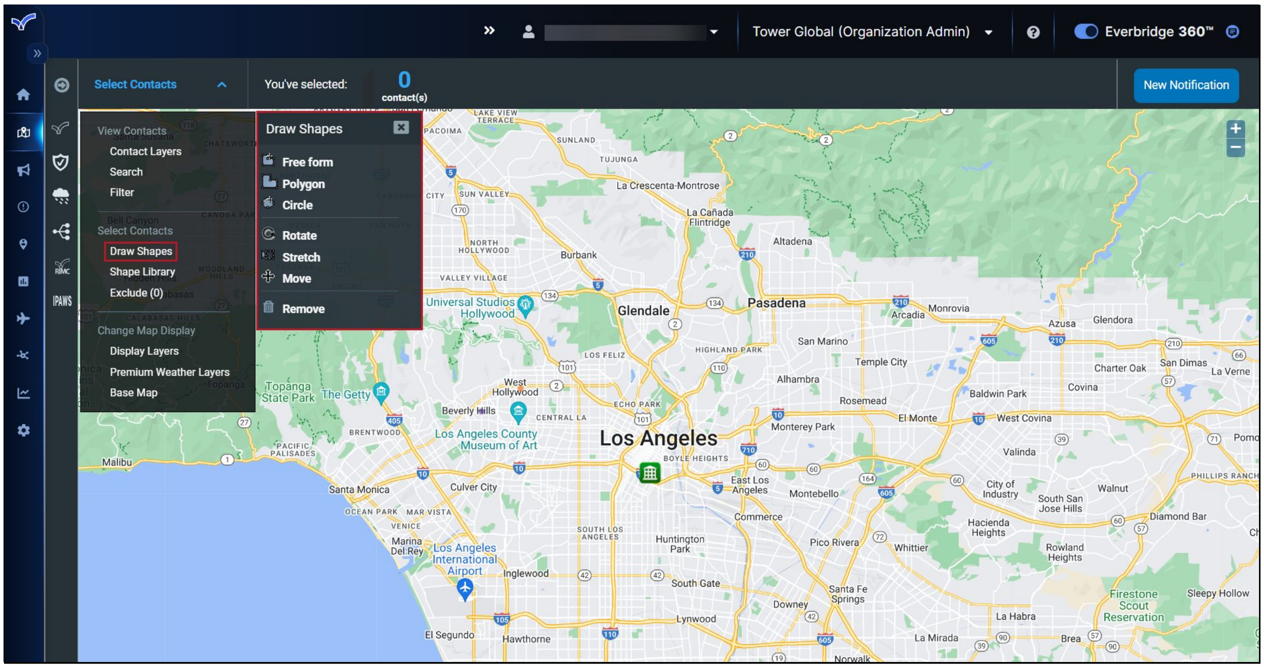
You can filter your contacts either by using an existing rule or by creating a filter.





Understanding Shapes

Shapes can be drawn directly on the Universe map by clicking **Select Contacts** > **Draw Shapes**.



Draw Shapes

The following types of shapes can be drawn from the **Draw Shapes** panel of the **Universe** tab:

- **Free form:** Used to draw free-form shapes. For example, to draw borders of a county. Click the mouse at the starting point of your shape and while holding down the mouse button, drag the mouse to add your free-form shape. Release the mouse button. (Think of it as using a pencil to draw without lifting the pencil.)
- **Polygon:** Similar to drawing a free-form shape, except the polygon only paints straight edges. Click the mouse at the starting point of your shape and while holding down the mouse button, drag the mouse to the next point, and click the mouse button. Continue to drag the mouse and click until your polygon is complete. When complete, double-click the mouse.
- **Circle:** Click the center of the circle and while holding down the mouse button, drag the mouse to resize the circle. Release the mouse button. Alternatively, click Search and enter an address that will be the center of the circle. From there, you can resize the circle manually or set a marker on the map with a specific radius.

NOTE: If you draw a shape on the map while a contact upload is in progress or as an individual contact is updated, the application selects contacts whose records are in the database even if the map tile server has not been refreshed. The map tiles for the contact layers are refreshed when the upload is complete. The dots on the map are visual representations from the database.

Rotate Shape

To rotate a shape:

1. Select **Rotate** from the **Draw Shapes** dialog.
2. Select the shape on the map. The shape changes color on the map.
3. Look for the "rotation handle," a round yellow dot. The rotation handle is located close to the shape, but not on it.
4. Select a rotation handle and drag the mouse to the new location.
5. Release the mouse button.

Stretch Shape

To stretch a shape:

1. Select **Stretch** from the Draw Shapes dialog.
2. Select the shape on the map. The shape changes color on the map.
3. Look for the "anchors," round yellow dots. Each shape type has a different number of anchors.
4. Select an anchor and drag the mouse to the new location.
5. Release the mouse button.

Move Shape

To move a shape:

1. Select **Move** from the **Draw Shapes** dialog.
2. Select the shape on the map. The shape changes color on the map.
3. Look for the + sign located in the center of the shape.
4. Click the **+** sign and drag the mouse to the new location.
5. Release the mouse button.

Delete Shape

To delete a shape:

1. Click **Remove** from the **Draw Shapes** menu.

2. Select the shape on the map. The shape changes color on the map.
3. Click the **X** in the shape.

Download Contacts from Polygons

Contacts can be downloaded directly from a shape on the map. To do this:

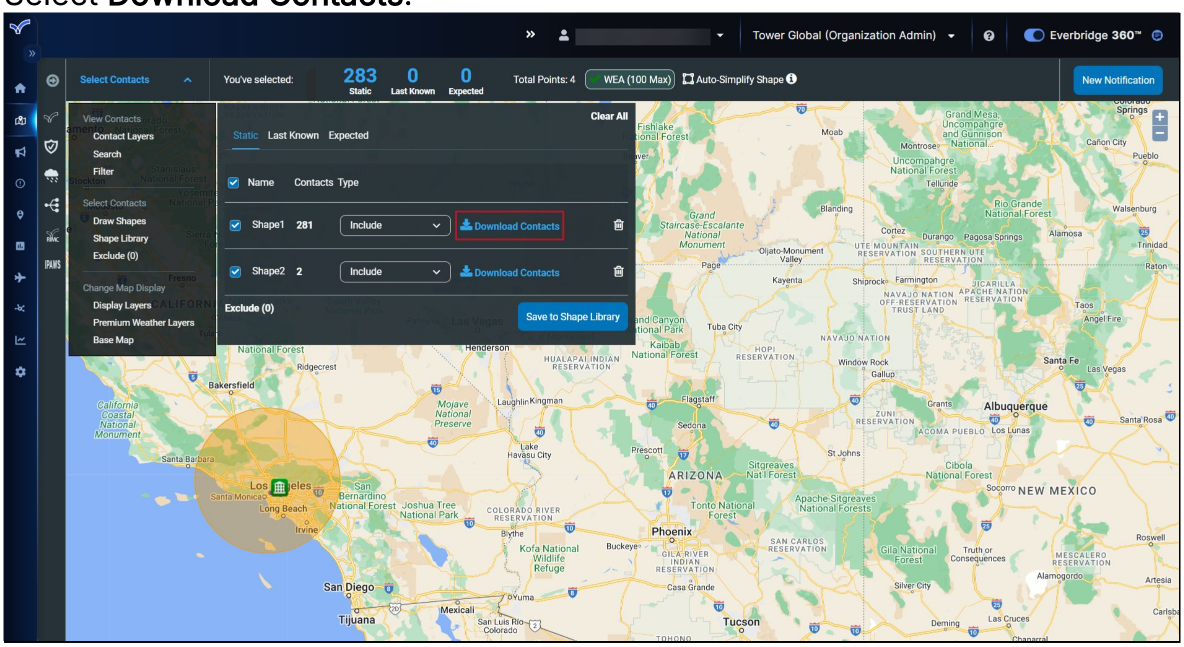
1. From the **Universe** tab, highlight contacts either by drawing a shape or by loading a shape from the Shape Library.
2. Click the number of contacts. The **Selected Contacts** dialog appears.

> **NOTE:** Incident Operators will not see the **Download Contacts** option since they lack the permission to use it.

3. Select the checkbox of the shape you want.

> **NOTE:** Until a second shape is drawn, you cannot “Exclude” the first shape.

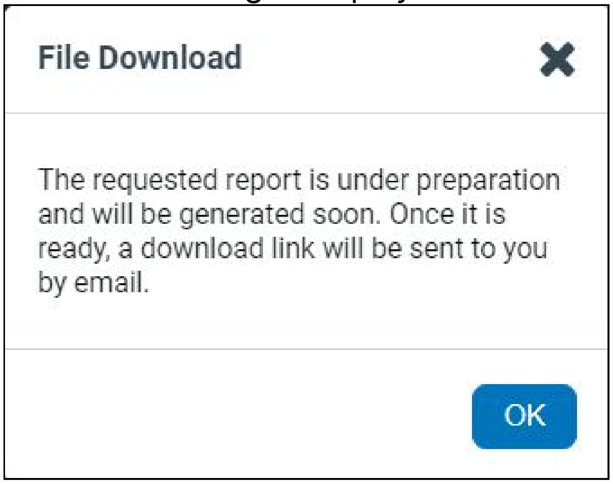
4. Select **Download Contacts**.



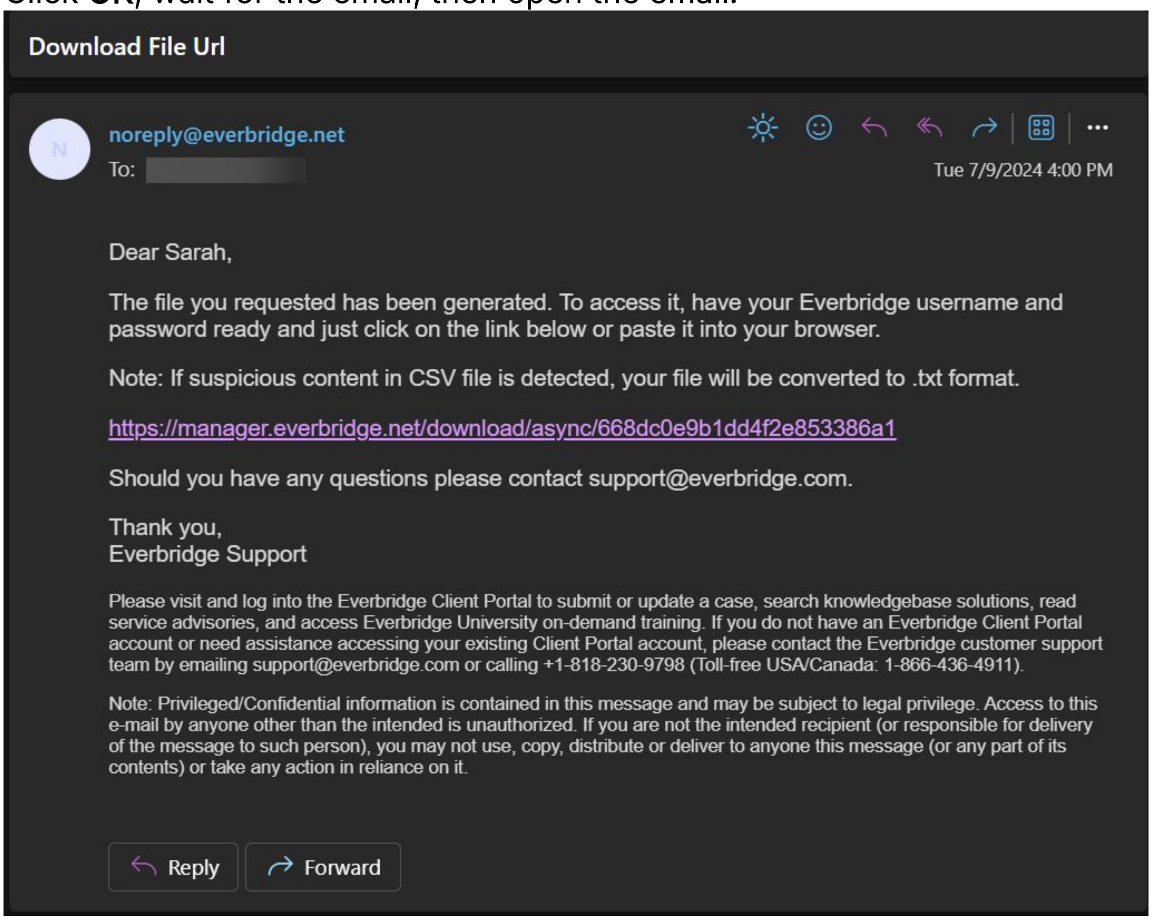
Either:

a. The Selected Contacts dialog expands, displaying the First Name, Last Name, and Address of the selected contacts. Select Download Contacts. Proceed to step 4b.

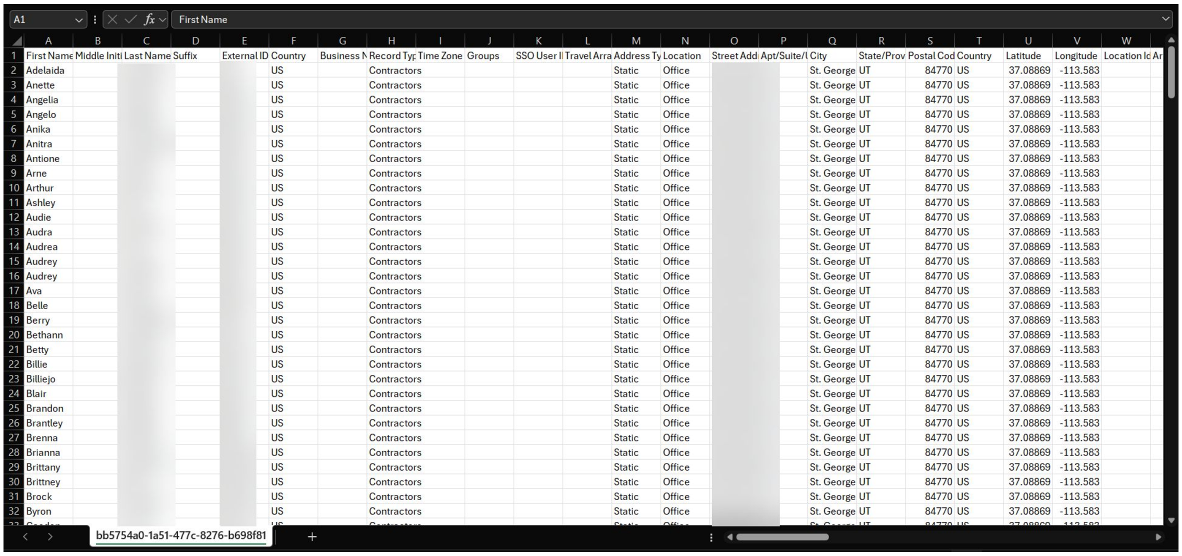
b. A Success dialog is displayed.



5. Click **OK**, wait for the email, then open the email.



6. Click the link to view the CSV file.



First Name	Middle Initi	Last Name	Suffix	External ID	Country	Business N	Record Typ	Time Zone	Groups	SSO User I	Travel Arra	Address Ty	Location	Street Add	Apt/Suite/U	City	State/Prov	Postal Cod	Country	Latitude	Longitude	Location Id	Ar
Adelaida					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Anette					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Angelia					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Angelo					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Anika					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Anitra					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Antione					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Arne					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Arthur					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Ashley					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Audie					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Audra					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Audrea					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Audrey					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Audrey					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Ava					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Belle					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Berry					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Bethann					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Betty					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Billie					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Billiejo					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Blair					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Brandon					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Brantley					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Brenna					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Brianna					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Brittany					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Brittney					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Brock					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		
Byron					US		Contractors					Static	Office			St. George	UT	84770	US	37.08869	-113.583		

7. Review the following table. The CSV download works with saved shapes and unsaved shapes. The CSV file lists the contacts and their addresses within that particular polygon.

CSV Field	Comments
First Name	
Middle Initial	
Last Name	
Suffix	
External ID	
Country	Numeric Country Code, ISO 2-character alpha country code from ISO-3166-1, or the full country name as it appears in any Country field of Everbridge Suite
Record Type	
Time Zone	
Groups	
SSO User ID	
Travel Arranger	
Address Type	Static, Last Known, or Expected Location

Location	Location Name as entered in the contact's record.
Street Address	
Apt/Suite/Unit	
City	
State/Province	
Postal Code	For US Addresses, ZIP Code or ZIP Code + 4
Country	
Latitude	Latitude value
Longitude	Longitude value, including negative sign
Arrive Date	Related to Dynamic Locations, this is when someone arrives at a location.
Expire Date	Related to Dynamic Locations, this is the date the location is considered valid.
Source	The source of the dynamic locations. For example, Lenel Badge Access system or the Everbridge Mobile app.
Extension Phone 1	
Extension 1	
Extension Phone Country 1	
Extension Phone 2	
Extension 2	
Extension Phone Country 2	
Extension Phone 3	

Extension 3	
Extension Phone Country 3	
Extension Phone 4	
Extension 4	
Extension Phone Country 4	
Extension Phone 5	
Extension 5	
Extension Phone Country 5	
Phone 1	
Phone Country 1	
Phone 2	
Phone Country 2	
Phone 3	
Phone Country 3	
Phone 4	
Phone Country 4	
Phone 5	
Phone Country 5	
Phone 6	
Phone Country 6	

Email Address 1	
Email Address 2	
Email Address 3	
Email Address 4	
Email Address 5	
Plain Text Email - 1 way	
Plain Text - 1 way Pager Service	
Plain Text Email - 2 way	
SMS 1	
SMS 1 Country	
SMS 2	
SMS 2 Country	
SMS 3	
SMS 3 Country	
SMS 4	
SMS 4 Country	
SMS 5	
SMS 5 Country	
FAX 1	
FAX Country 1	

FAX 2	
FAX Country 2	
FAX 3	
FAX Country 3	
TTY 1	
TTY Country 1	
TTY 2	
TTY Country 2	
TTY 3	
TTY Country 3	
Numeric Pager	
Numeric Pager Country	
Numeric Pager Pin	
Number Pager Service	
TAP Pager	
TAP Pager Country	
TAP Pager Pin	
One Way SMS	
One Way SMS Country	

Using Shapes

You can save the shapes you draw on the map or upload them from the **Settings** tab. These shapes are stored as 'shape files' in your **Shape Library**, where you can easily retrieve them when needed.

> **NOTE:** If you upload shapes to your Shape Library, make sure there are only shapes, and not nested folders, contained in the compressed file (ZIP file). In other words, the ZIP file can only contain the shapes.

The Shape Library is located in **Organization** > **Map**. You can add folder names for your shapes to quickly find the desired ones rather than scrolling a lengthy list of shape names. The Shape Library of previously uploaded or saved shapes, KML (Keyhole Markup Language) files, or shape files (well-defined polygons) are located here, too.

Using Shapes

To use files in the Shape Library:

1. From the **Universe** tab, select **Shape Library** from the **Select Contacts** drop-down list. Note that your shape might be organized in a folder.
2. Select the desired folder to open it.
3. Click **Load** for the shape you want to load. The shape appears on the map. You can use any of the shape tools on this shape. You can draw other shapes on the map to include more contacts or exclude contacts from this shape.
4. View the contacts in the shapes by selecting the link: You have selected NN Static, NN Last Known, NN Expected, where NN is the number of contacts.
    - Click **Download Contacts** to request a report of contacts and their addresses who are located within the polygon. When ready, you will receive an email with a link to download the CSV file. Download Contacts works in unsaved shapes as well.
    - If needed, you can remove shapes by clicking the Trash Bin in the row of the shape to be deleted. To remove all shapes, select Clear All.
5. To save the shapes to the Shape Library:
    a. Click the link: **You've selected <u>NN contact(s)</u>.**
    b. Select the checkbox of each desired shape.
    c. Click **Save** to save the shape.
    d. Type a name for the shape.

   e. Optionally, in the Folder field, select the existing folder name from the drop-down list or type a new folder name.
   f. Click **Save**.
6. Click the **X** in the upper right-hand corner of the Shape Library dialog.

Excluding Contacts by Name or Address

To exclude contacts by name or address:

1. From the **Universe** tab, select **Exclude Contacts** from the **Select Contacts** drop-down list. The **Exclude Contacts** dialog is displayed. You can exclude by name (step 2) or by address (step 3).
2. To exclude by name:
   a. Make sure that **Full Name** is selected from the **Search contacts by** drop-down list.
   b. Type the first and last name (or just the first name) of the contact to exclude.
   c. Click **Search**.
   d. Proceed to step 4.
3. To exclude by address:
   a. Select **Street Address** from the **Search contacts by** drop-down list.
   b. Type the address you want to exclude.
   c. Click **Search**. Contact names are displayed who list that address for one of their locations.
   d. Proceed to step 4.
4. Select the checkbox next to each contact name you want to exclude. (To exclude all the contacts, select the checkbox in the column heading row.)
5. Click **Exclude**.
6. Click the **Excluded List** sub-tab to view the excluded contacts.

To remove a contact from the “excluded” list, select the checkbox next to each contact name you want to remove. To remove all contacts from the “excluded” list, select the checkbox in the column heading row and click Include. The contacts will be included for notification.

Shape Library User Messages

The following table lists the Shape Library user messages and their possible root causes.

Message	Possible Root Cause
The file you have uploaded is empty.	The file does not contain the expected objects.

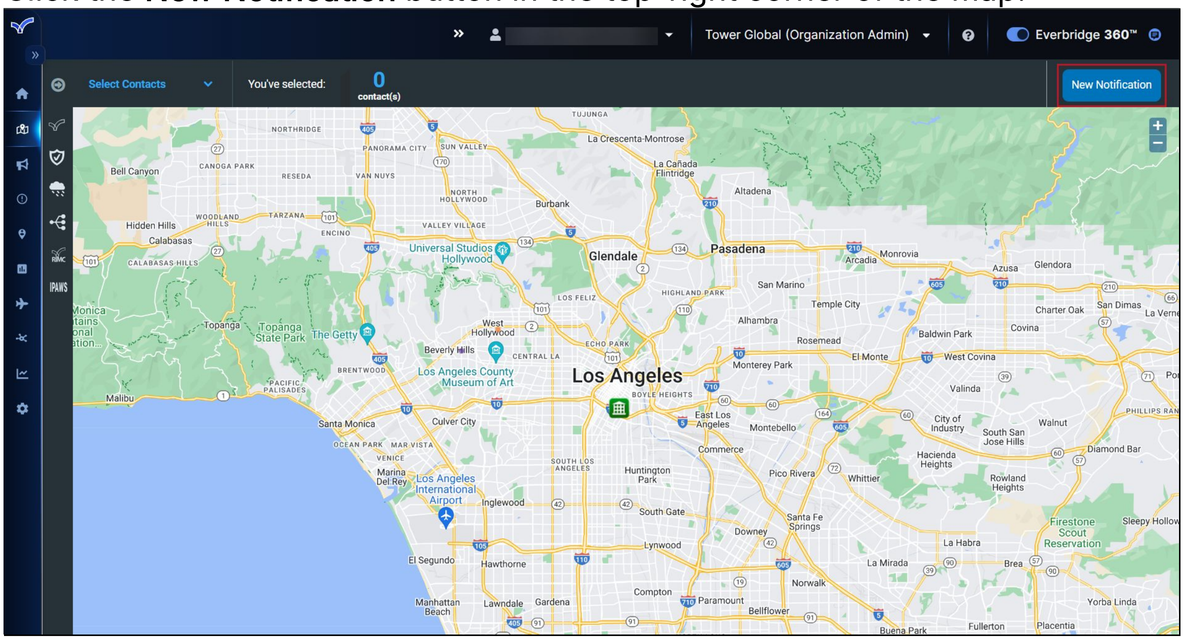
The file does not contain valid shapes.	The file is not empty, but contains invalid content (for example, an image file, more than one folder, the folder name contains a space, and so forth).
One or more shapes cannot be loaded {plus additional detail if available}.	The file contains a shape that is not a closed, single loop polygon; for example, an open polygon, nested polygons (multiple loops), self-intersecting polygons, and so forth.
One or more circle shapes in this file are missing a center or a radius.	One or more circle polygons in the file are missing information needed to draw the shape.
File size exceeded 100 MB.	The file is larger than 100 MB.
Only ZIP or KML files are supported.	The file has an extension other than ZIP or KML.
File import failed.	The file is empty, the shape object is empty, or a detailed root cause could not be identified.
Delete Shape: The delete capability has been disabled because it cannot be used when there are only "exclude" conditions selected.	Your shape must have at least one "include" condition.
Save to Shape Library: The Save to Shape Library capability has been disabled because it can't be used when there are only "exclude" conditions selected.	Your shape must have at least one "include" condition.

Sending a Notification from Universe

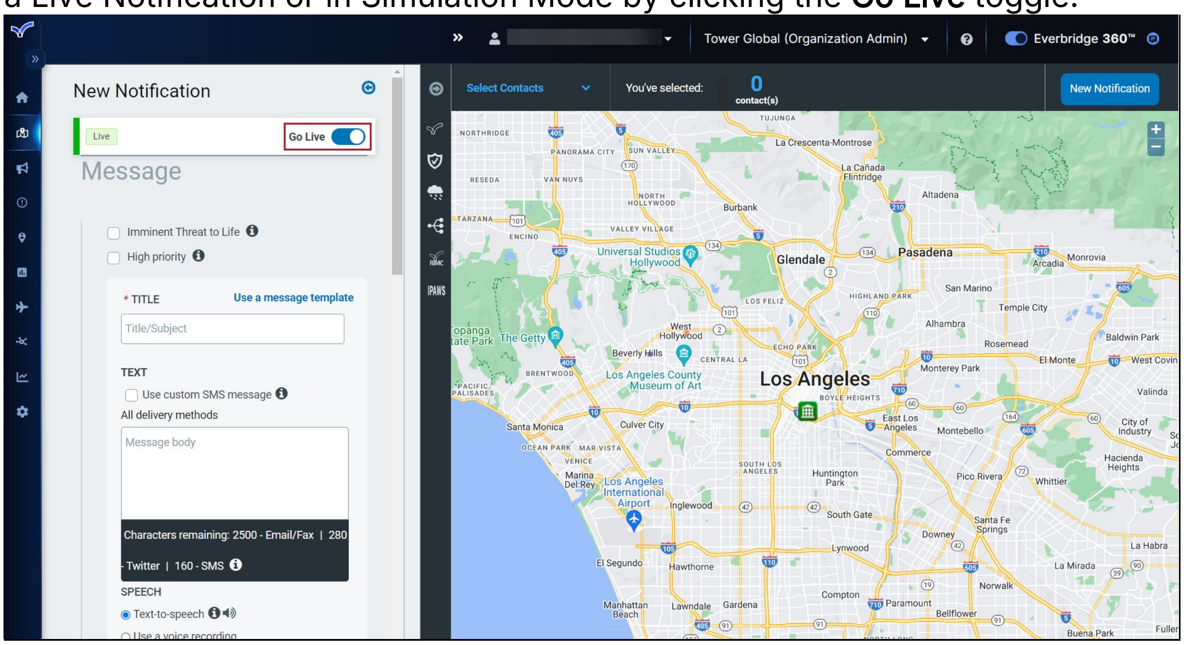
New Notifications can be created and sent directly from the Universe map, allowing operators to select contacts using shapes or contact layers.

To send a new Notification from Universe:

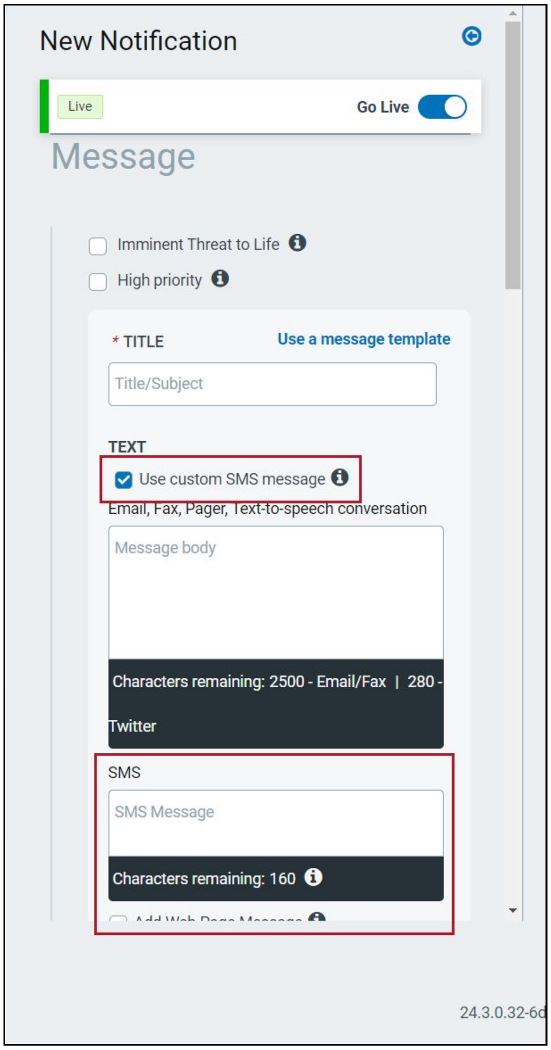
1. Click the **New Notification** button in the top-right corner of the map.



2. The **New Notification** panel opens to the left. Specify whether to send this as a Live Notification or in Simulation Mode by clicking the **Go Live** toggle.



3. Specify if this Notification should be sent with the **Imminent Threat to Life** or **High Priority** designations.
    - **Imminent Threat to Life** - Means the event, Incident, or emergency puts the life or safety of message recipients immediately at risk, and:
        - Has just occurred (e.g. an earthquake, volcanic eruption, or failed life-support system)
        - Is in progress (e.g. an active shooter or nuclear power plant emergency), or
        - Is expected to happen today (e.g. severe weather)
    - **High Priority** - An emergency situation that doesn't necessarily put lives at risk but is otherwise highly disruptive.
4. If applicable, preconfigured message templates can also be used for the Notification by clicking **Use a message template**.
    - Select the desired message and click **OK**. The Title and Body fields are pre-filled with information from the message template.
    - Optionally, edit the Title and Body text to make it unique for this situation.
    - Optionally, save this information as its own Message Template by selecting the **Save as message template** checkbox.
5. Give the message a title, like Chemical spill at Wall St. If this message is sent by email, fax, or SMS, the title becomes the subject line.
6. Add a message by typing it in the **Message Body** field. The message will be used for email and text devices, and the text-to-speech engine will read it for voice delivery to phones.
7. Optionally, select the **Use custom SMS message** checkbox. Use this option to create a separate SMS message for SMS delivery.

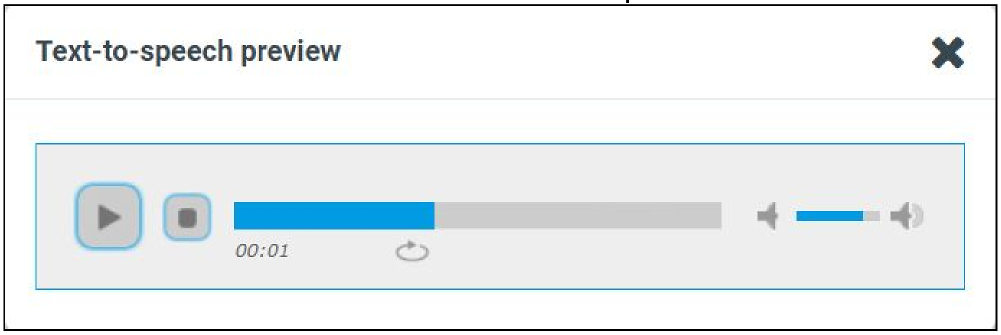


When selected:

- You can customize the email with text formatting, images, color, tables, etc. The Web Page Message is added to the end of the SMS message.
- Text entered in the Body will only go to non-email delivery methods (for example, fax or pager) and will be used for text-to-speech conversion.

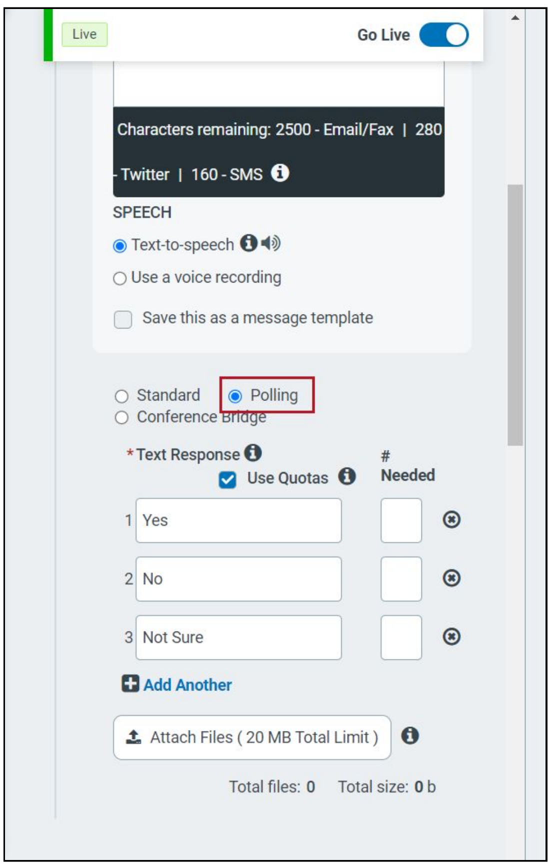
8. Optionally, select the desired Speech radio button:
   - **Text-to-Speech** - Converts text entered in the Body into an audio file for use with any phone delivery method. The language of the Text-to-Speech Preview is the language selected as the default language, or the language selected in the **Settings** section of the Notification form. To listen to a preview of the recording, click the **Preview** button, then the **Play** button in the **Text-to-Speech Preview** dialog. Note that separate

email content is not utilized for Text-to-Speech.



- **Use a Voice Recording** - Record and upload a voice message. See Add a Voice Recording for more details.

9. Select a Message Type:
   - **Standard** - A Standard message is simply a Notification of the text.
   - **Polling** - In a Polling message, add options to solicit responses to the message. The contact can choose one of the options, and you will see them in Broadcast Results.



     - If you select **Polling** > **Use quotas**, you can add options for contacts to respond to a list of choices and then you send a Follow-Up with the results. For example, if you need five volunteers to work the graveyard shift on Saturday and Sunday, you can type Need volunteers to work graveyard on Saturday with

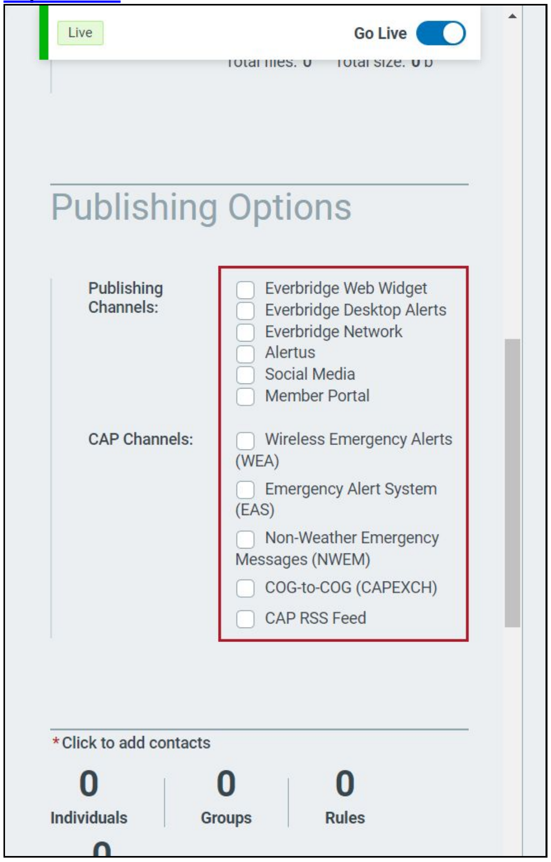
 # Needed as 5 and Need volunteers to work graveyard on Sunday with **# Needed** as 5. Broadcast Results show which contacts are willing to work. You can then send a Follow-Up letting everyone know who is working (the first five contacts to volunteer).

- Note that for your Polling message type, in **Settings**, the **Voicemail Preference** and **Confirm** panes are replaced with the **SMS Call Back** pane. In this pane, when the **SMS Call Back** checkbox is selected, the SMS recipients are provided with a number to call and make their polling selection. If the checkbox is clear, the SMS recipients will see a menu to select their polling choice directly from the device.

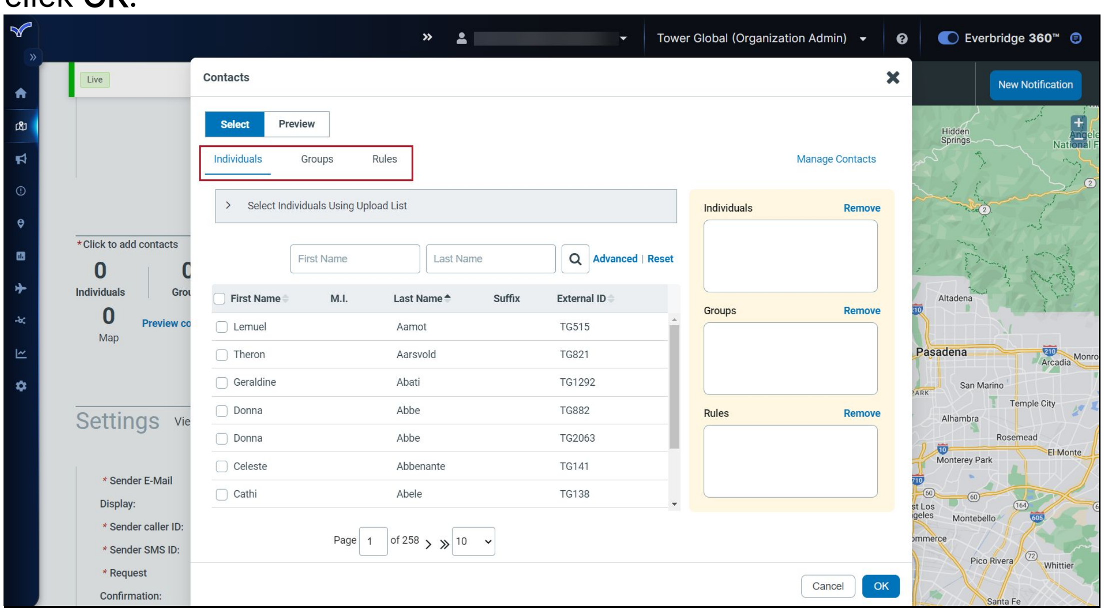
- **Conference Bridge** - In a Conference Bridge, the message prompts recipients to join a conference call. This could be an emergency where contacts need to discuss the situation immediately. Or, it might be a convenient way to pull everyone together for the weekly status meeting. Contacts reached by phone can push a button to connect to the conference bridge. Contacts who receive a text message will see the instructions for joining the call. Everbridge Conference Bridge notifications can support up to 96 contacts. Custom Conference Bridge and Smart Conference Bridge Notifications can support up to 250 contacts.

10. Attach up to five files, as needed. The maximum single file size is 2 MB; the total file size for all attachments is 2 MB. Each filename should be no more than 80 characters. You can attach files if the notification is to be sent via email, Everbridge Mobile App, or fax. If the Notification is to be sent via fax, ensure you are using file types that will be receivable via a fax transmission (for example, no audio files). Fax attachment files should not contain macros or complicated formatting; we accept 178 different document types including the more commonly used formats such as Microsoft Word, Microsoft Excel, PDF, and HTML.

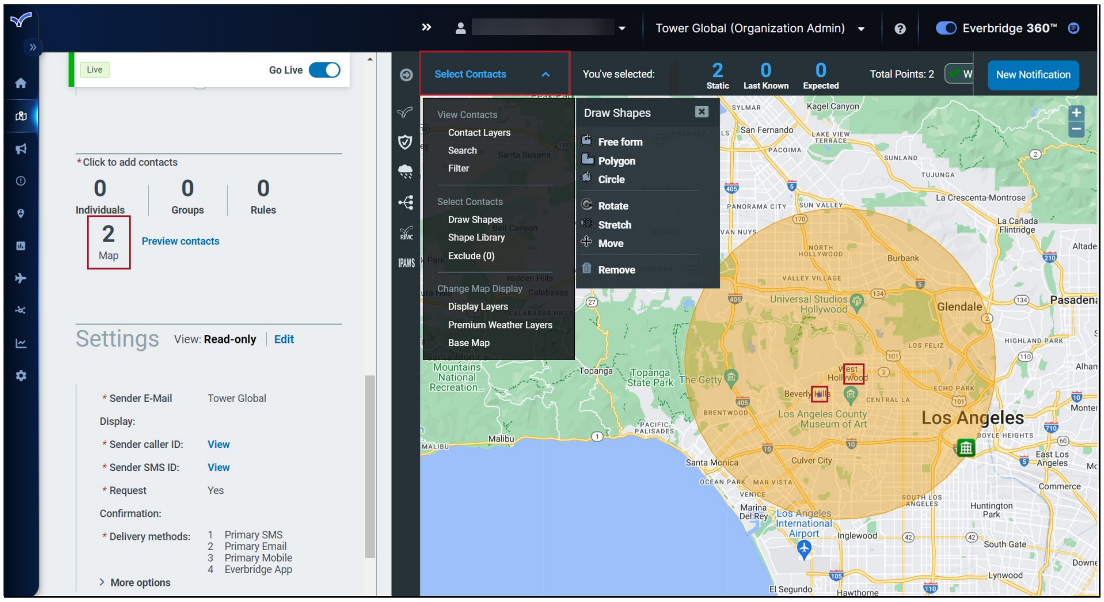
11. Select your publishing options for the Notification. See Incident Publishing Options for more details.



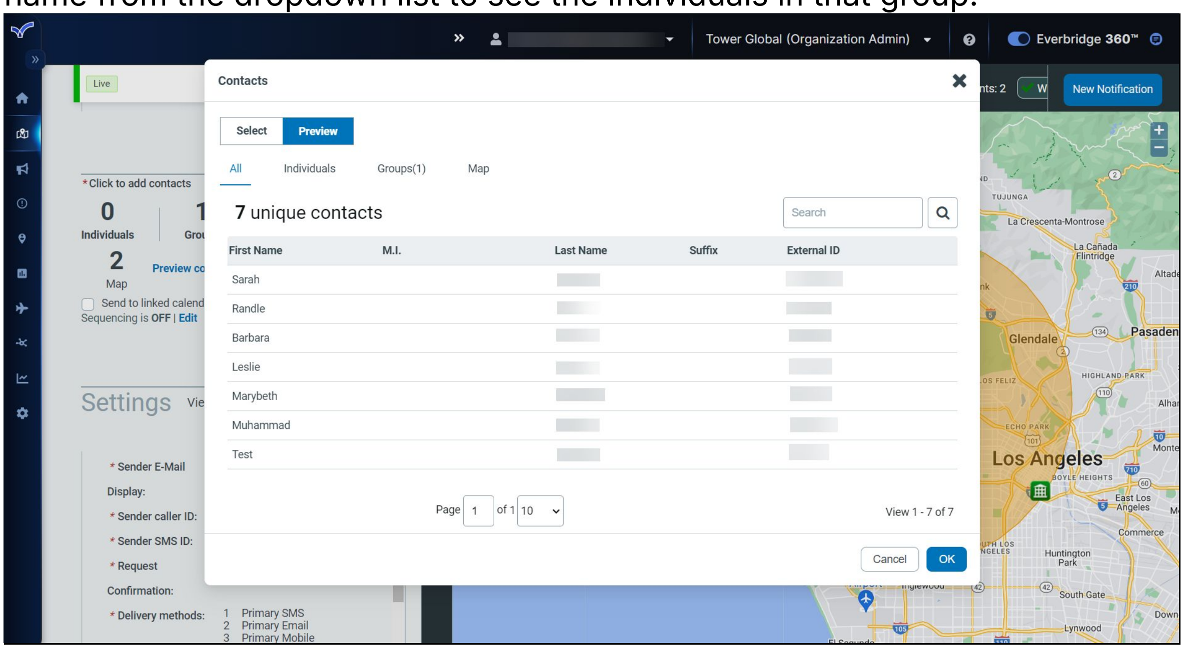
12. Contacts can be chosen in two different ways:
    - Select contacts via the **Individuals**, **Groups**, or **Rules** tabs, then click **OK**.



- Use shapes on the Universe map to capture applicable contacts for the Notification.



13. 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, a rule, and/or from the map. When previewing from a group, select the group name from the dropdown list to see the individuals in that group.

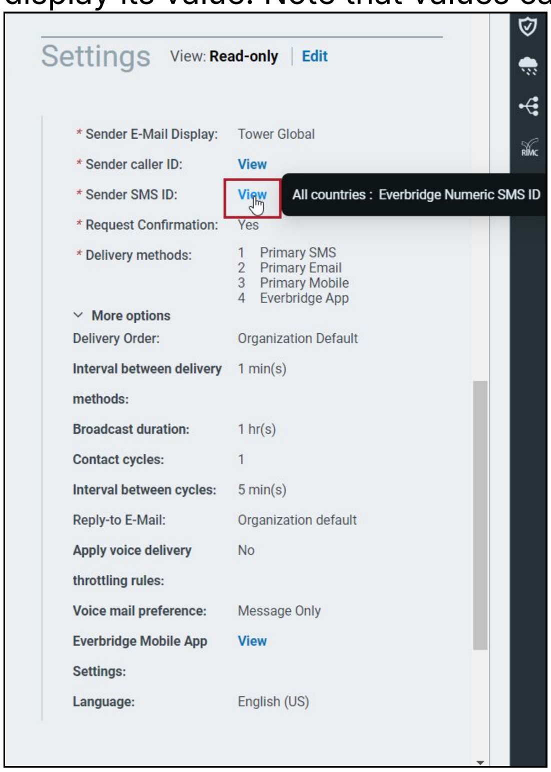


14. If available to your Organization, map your Incident Zone by placing at least one polygon on the map. Public Incident Zones are used by State and Local Governments, where the end-user locations are anonymous. Private Incident Zones, a Safety Connection feature, are used to see which employees are in an impact area and message them. For a Public Incident Zone, the Mobile

Push Alert delivery method must also be enabled in the Organization; for a Private Incident Zone, the Mobile Push Alert is not required to be enabled.

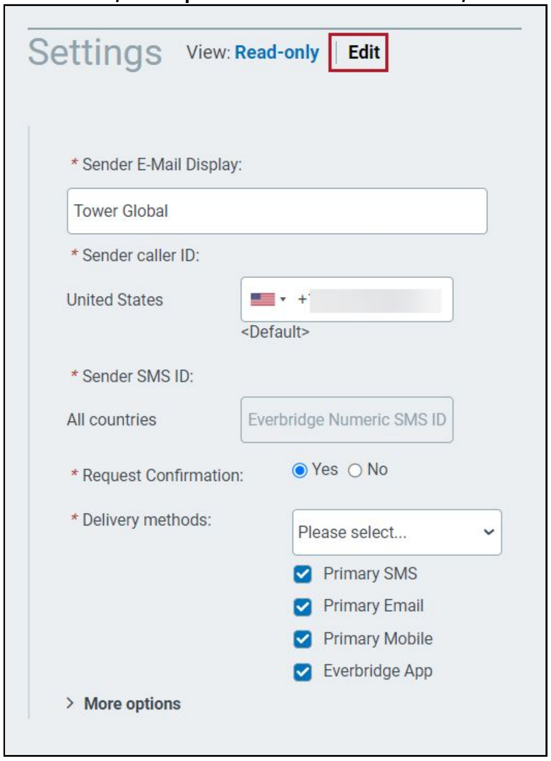
- **Geotarget** - When you have a polygon on the map, and the Everbridge Mobile app
  Location Services = ON (on the recipients' cell phones), the recipients will get push
  notifications.
- **Geofencing** - All geocontacts located in or entering the area defined by your polygon(s) will receive this message. For Public Incident Zones, Everbridge will be added as a Delivery Method and the Contact Cycles will be set to 1; for Private Incident Zones, the Contact Cycles can be set to more than 1.
    - Only the Standard message type can be used in a Public Incident Zone, while only Standard and Polling message types can be used in a Private Incident Zone. The Conference Bridge message type cannot be used with the Incident Zone feature.

15. Review the **Settings** section, which will open in the Read-only view by default. If a setting's field has a **View** link, hovering the mouse over it will display its value. Note that values cannot be changed in this view.

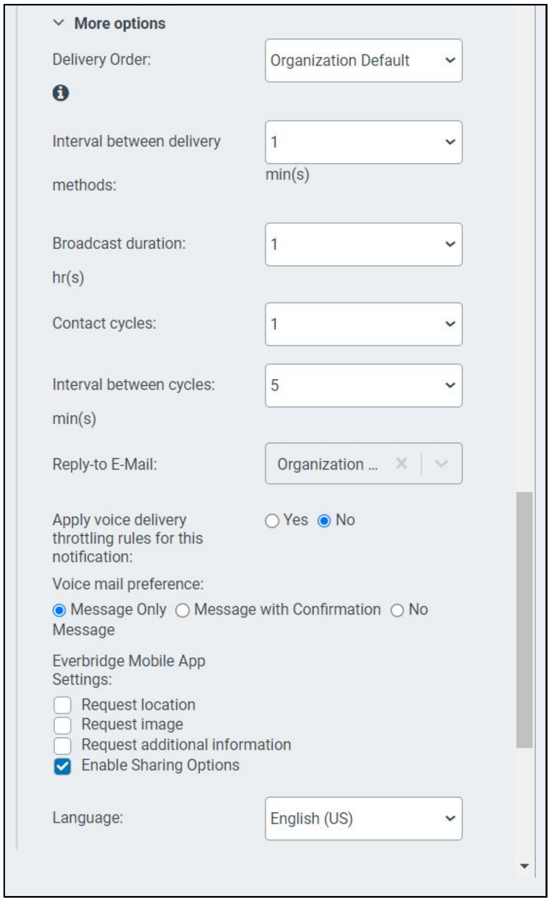


If you have permission to edit these settings, toggle to the **Edit** view to make any necessary changes to the Sender Email Display, Sender Caller ID, Sender

SMS ID, Request Confirmation, and Delivery Methods.

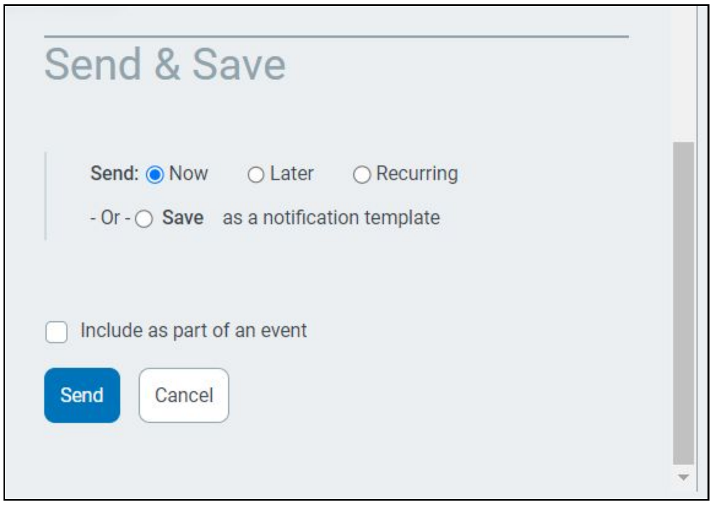


16. If desired, click **More Options** to reveal additional settings, such as Delivery Order or Voicemail Preferences.



17. In the **Send & Save** section, select one of the following Send commands:
    - **Now** - Send the Notification immediately.
    - **Later** - Schedule a later date and time to send the Notification. When the Date field appears, click the Calendar icon to select the desired date and time (using 24-hour format).
    - **Recurring** - Configure the schedule and how often to send the Notification. Click the **Calendar** icon to select the date ranges and the **Clock** icon to set the time.
    - **Save as a Notification Template** - Save this Notification as a template to send when needed. You can save it in a Category to make it quicker to find when trying to broadcast it. Select from the drop-down list or type a new category name directly into the text box. Additionally, you can save the Notification Template with a Template ID using up to 20 characters, numbers only, not starting with zero (0). This lets you launch your Notification by phone when you can't access the Internet or

WiFi.



18. Optionally, select the **Include as part of an event** checkbox. This way, if you associate the Notification with an event, you can view the event and see the history of the Notifications, all in one place. Select from the drop-down list or type a new event name directly into the text box.
19. Depending on your Send & Save selection, click the **Send** button, the **Schedule** button, or the **Save** button, as appropriate. Once sent, the Notification can be monitored from the **Active / History** tab.

Change Map Display

There are two types of map layers in the Universe tab: **Display Layers** and **Premium Weather Layers**. Using the **Base Map** link, you can change the type of map from the default by choosing a different radio button.

Display Layers

A display layer is any type of shape that you want to overlay on the map. It is a way for you to lay reference information on top of the map. For example, it could be a county or city boundaries, a school district, or even school buildings.

In the **Settings** tab, under **Map** > **Display Layers**, you can add display layers or import shape files in a compressed file (zip format).

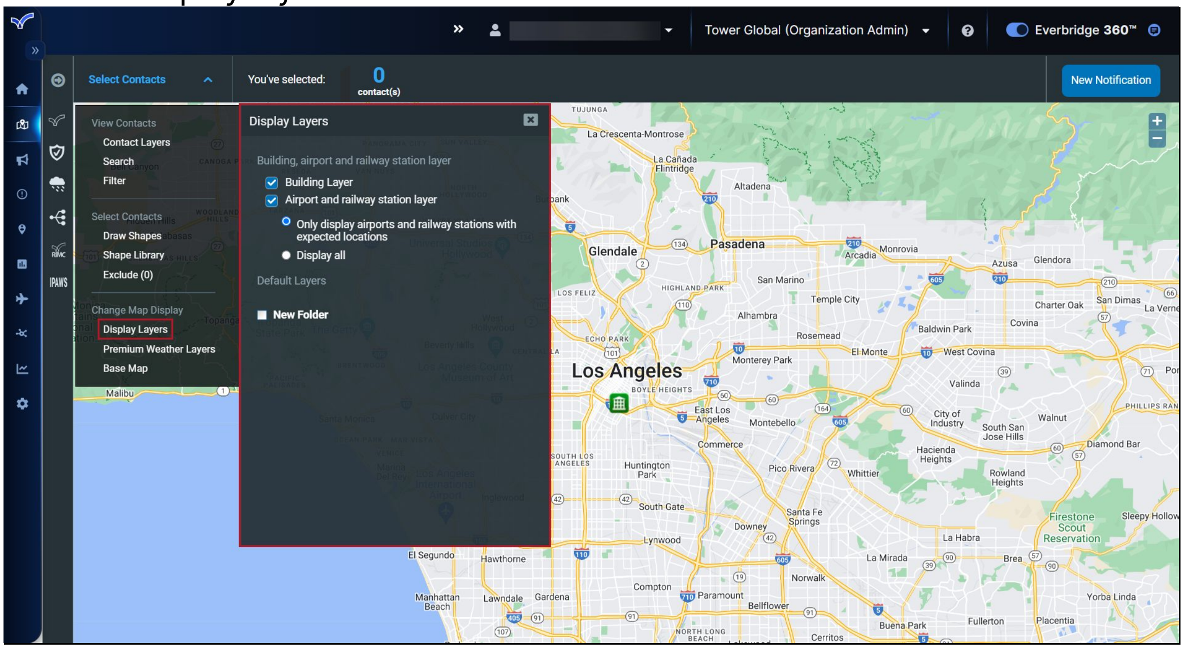
NOTE: If you upload shapes to Display Layers, make sure there are only shapes, and not nested folders, contained in the compressed file (zip file). In other words, the zip file can only contain the shapes.

For example, you might have a display layer showing areas in a water district. By combining this display layer with a contact layer of citizens who have opted in to be notified of hydrant flushing, you can target the correct contacts.

To use Display Layers:

1. From the **Universe** tab, select **Display Layers** from the **Select Contacts** drop-down list. The **Display Layers** dialog is displayed. The list displays the layers that have been loaded by your organization, including any Buildings and/or Airports and Railways.

2. Select the checkbox of a layer to display it on the map. Clear the checkbox to hide the display layer.



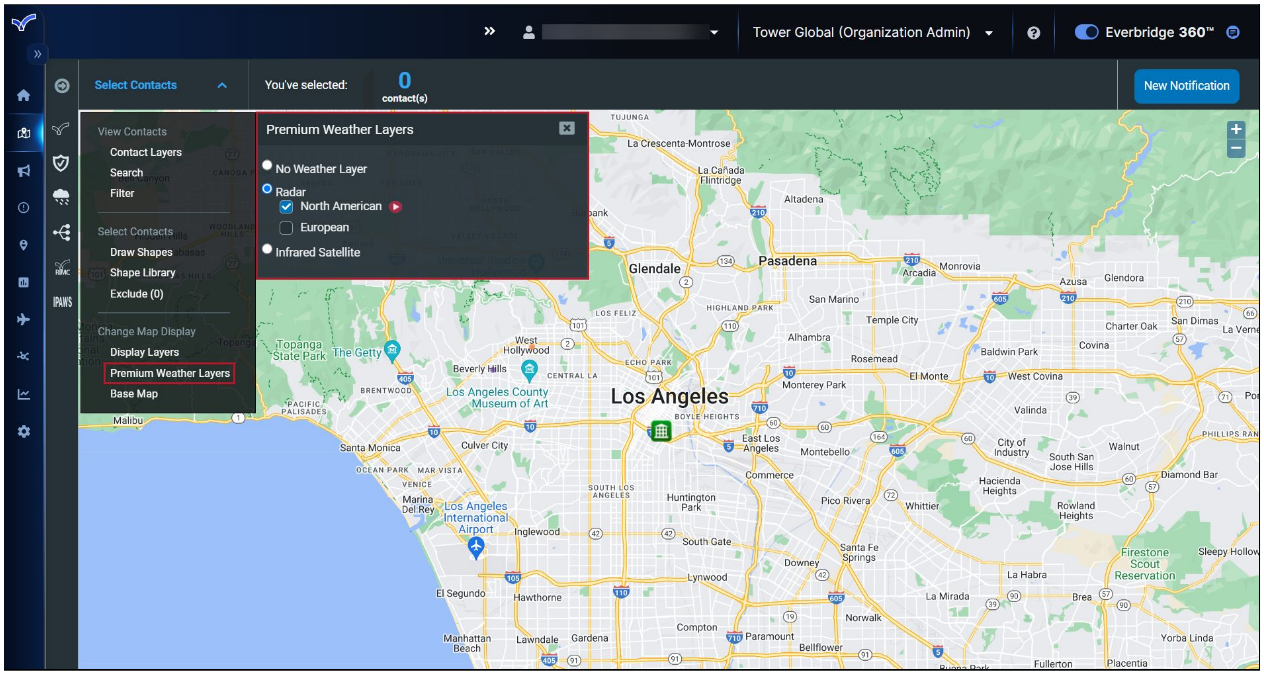
Display Layers User Messages

The following table lists the Display Layers user messages and their possible root causes.

Message	Possible Root Cause
The file you have uploaded is not a shape file. Please check it and try again.	The file is not empty, but contains invalid content (for example, an image file, more than one folder, the folder name contains a space, and so forth).
Please enter a value with a valid expression.	The file extension is not .zip.
The file you have uploaded is empty.	The files does not contain the expected objects.
One or more circle shapes in this file are missing a center or a radius.	One or more circle polygons in the file are missing information needed to draw the shape.
File size exceeded 100 MB.	The file is larger than 100 MB.

Premium Weather Layers

You can select a premium weather layer to monitor applicable weather events from the Everbridge interface.



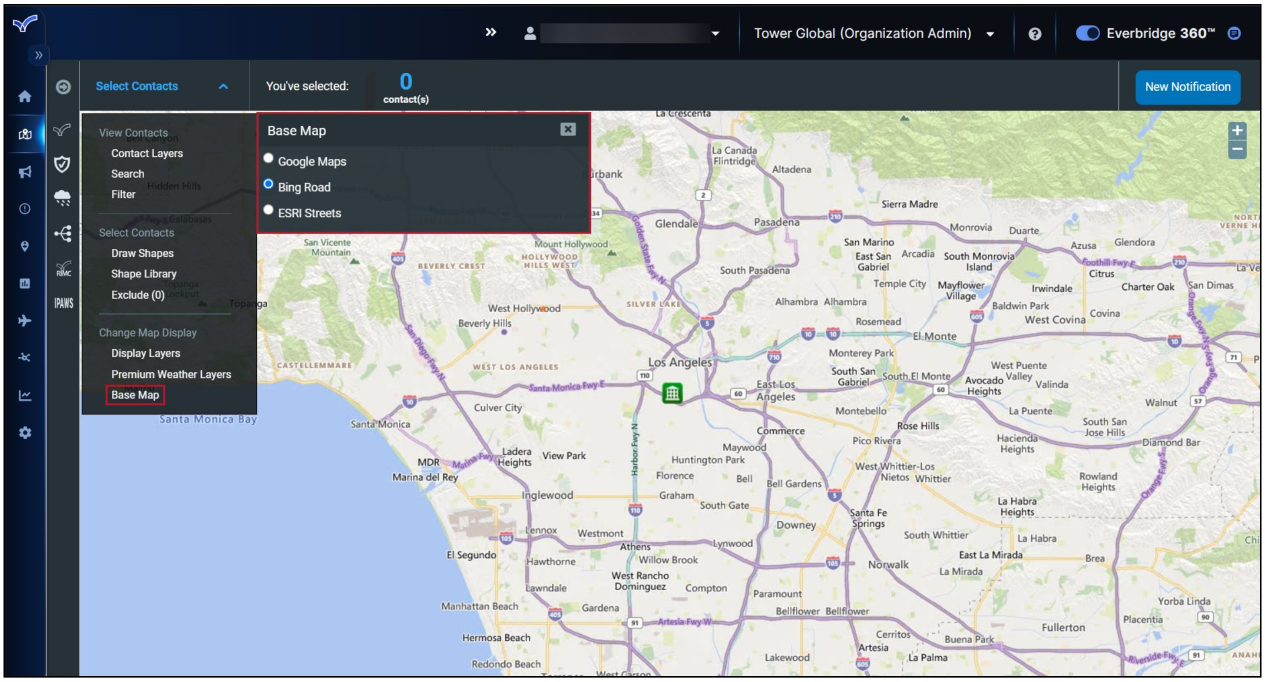
The following are the premium weather display layers. To refresh a weather display layer, reload the Universe tab.

- **Radar:** You can choose one or both radar layers.
  - **North American:** Radar suitable for use in detecting clouds and precipitation in North America.
  - **European:** Radar suitable for use in detecting clouds and precipitation in Europe.
- **Infrared Satellite:** Infrared satellite imagery senses surface and cloud temperatures.
  - White: High clouds/cold temperatures
  - Light Grey: Mid-level clouds/mid-level temperatures
  - Dark Grey/Black: Low clouds/warm temperatures

Click **Play** next to the selected display layer. Once 100%, the display layer is shown as animated so you can see the flow of the weather patterns on the map. Click **Stop** to return to the static shapes on the map. The tooltip shows the timestamp of the current weather pattern of the premium weather layers.

Base Map

You can change the type of map from the default by choosing a different radio button. You will see a Custom Map offered if it has been uploaded and published.

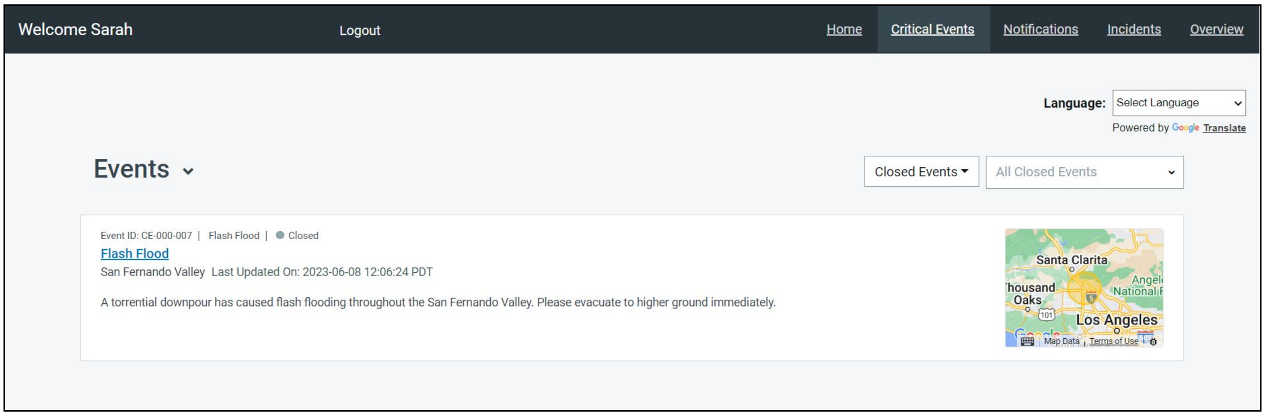

Tower Global (Organization Admin)
Everbridge 360™
Select Contacts
You've selected:
0
contact(s)
New Notification
View Contacts
Contact Layers
Search
Filter
Select Contacts
Draw Shapes
Shape Library
Exclude (0)
Change Map Display
Display Layers
Premium Weather Layers
Base Map
Base Map
Google Maps
Bing Road
ESRI Streets

Member Portal

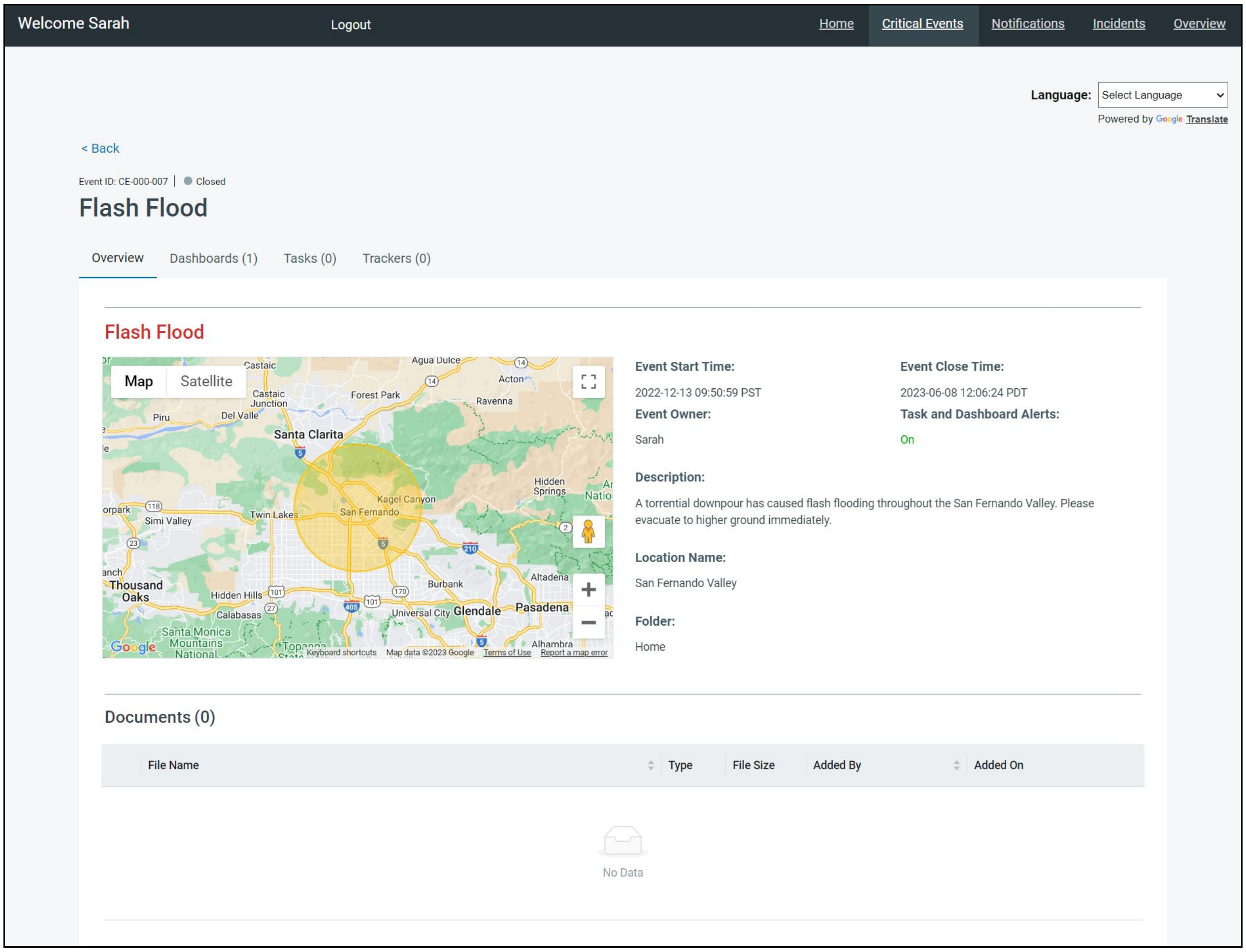
The **Member Portal** is an extension of an Everbridge Organization where contacts can register for alerts specific to that organization. The Member Portal allows contacts to edit their contact profile so that there is less contact management for Everbridge users. This includes all of a contact's information, such as addresses and delivery methods.

Viewing the Dashboard Events from the Member Portal

You can see any Dashboard events that have been shared with you from the Member Portal. Select **Critical Events** from the menu bar at the top of the page. Then, from the **View menu**, you can search for a specific event or select a recent Critical Event.



After clicking the desired Dashboard name, you can view its widgets. If there is a **Notes** widget, you can add text up to four files.


Welcome Sarah
Logout
Home
Critical Events
Notifications
Incidents
Overview
Language:
Select Language
Powered by Google Translate
< Back
Event ID: CE-000-007 | Closed
Flash Flood
Overview
Dashboards (1)
Tasks (0)
Trackers (0)
Flash Flood
Map
Satellite
Santa Clarita
San Fernando
Thousand Oaks
Simi Valley
Burbank
Glendale
Pasadena
Event Start Time:
2022-12-13 09:50:59 PST
Event Close Time:
2023-06-08 12:06:24 PDT
Event Owner:
Sarah
Task and Dashboard Alerts:
On
Description:
A torrential downpour has caused flash flooding throughout the San Fernando Valley. Please evacuate to higher ground immediately.
Location Name:
San Fernando Valley
Folder:
Home
Documents (0)
File Name
Type
File Size
Added By
Added On
No Data

Viewing Single Event Dashboards from the Member Portal

After the user receives the Single Event Dashboard link via email or SMS, the Member Portal login prompt appears.

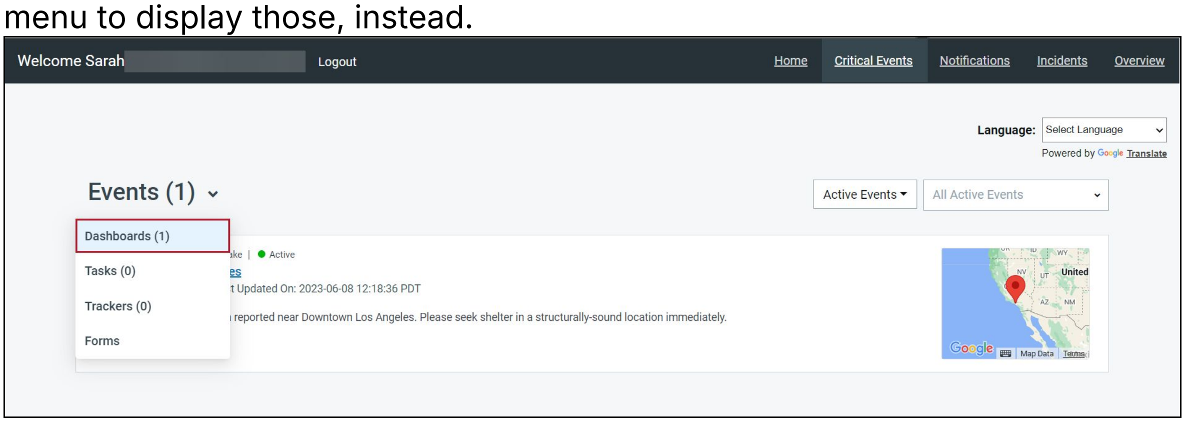
To view the Single Event Dashboard from the Member Portal:

1. Click the link to advance to the Member Portal and log in.
2. Once logged in, your Single Event Dashboard appears.
   - The Dashboard on the Member Portal is responsive. If the user views the Dashboard on a phone device, the layout is single-column-based.
3. In the **Notes** widget, optionally enter your note text in the text field.
4. Optionally, attach up to four files to the Note, which are not limited to images only.
5. Click **Back** to return to all the Single Event Dashboards.

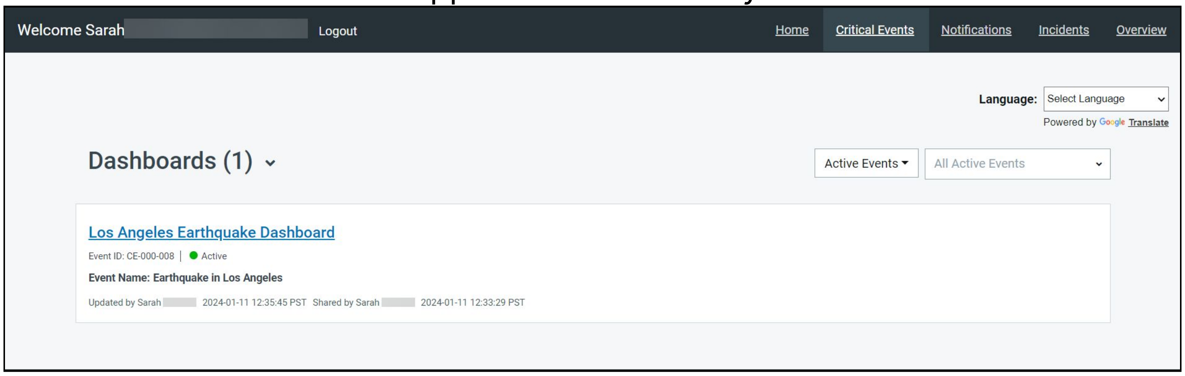
> **NOTE:** If configured, when a status change is made from a Mobile phone or the Member Portal, a real-time alert is shown in the Manager Portal. See Real-time Updates.

To view a Critical Event Dashboard in the Member Portal without using the provided link:

1. Log in to the Member Portal.
2. Click **Critical Events** in the top menu bar.
3. By default, Events will be displayed. Select **Dashboards** from the dropdown menu to display those, instead.

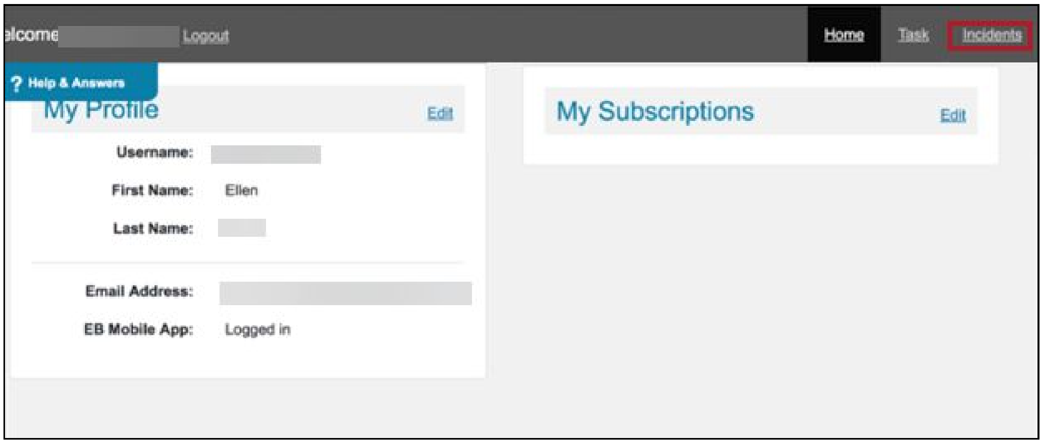


4. The list of Dashboards will appear. Click the one you want to view.

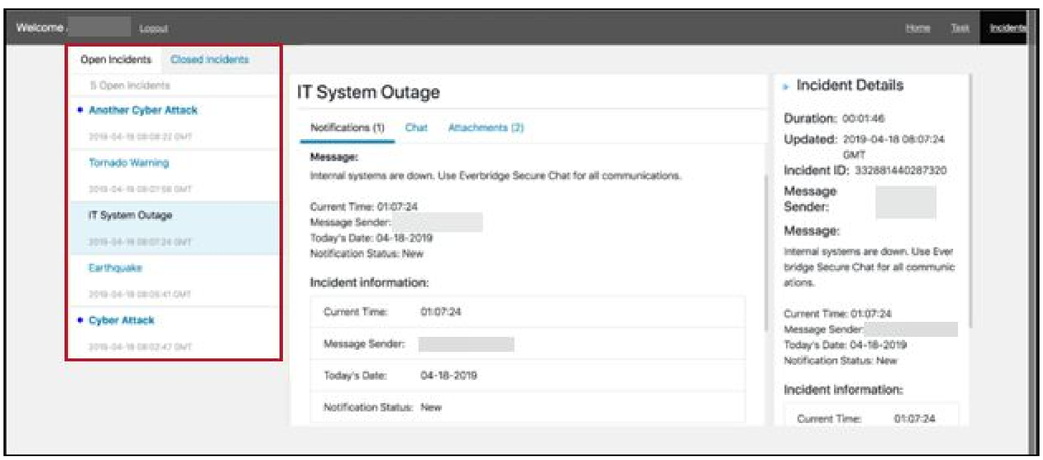


Using Incident Chat in the Member Portal

1. If **Display Incident information** has been selected under **Member Portal** > **Portal Options settings**, contacts logging into the Member Portal will see an Incidents link.

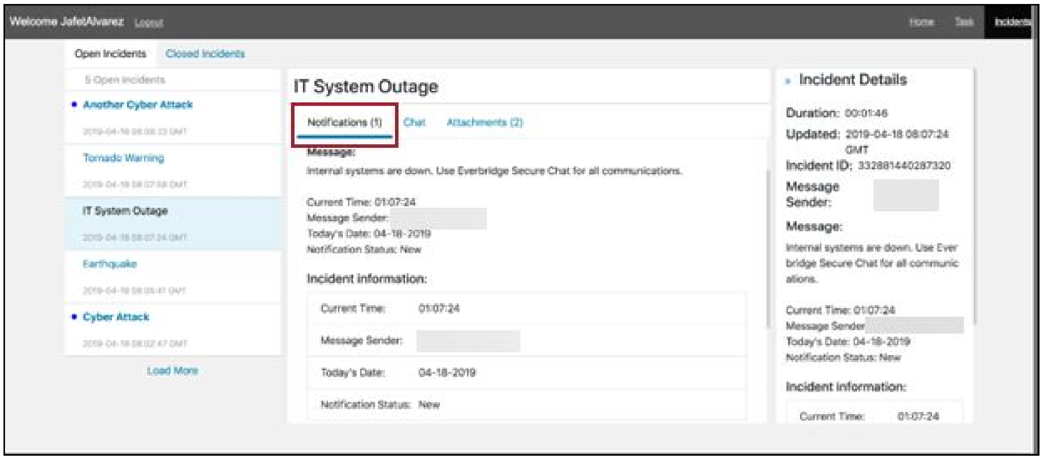


2. When the **Incidents** option is selected, the Member Portal displays a list of Incidents for which the logged-in Member Portal user has been a contact in at least one Notification for that Incident.

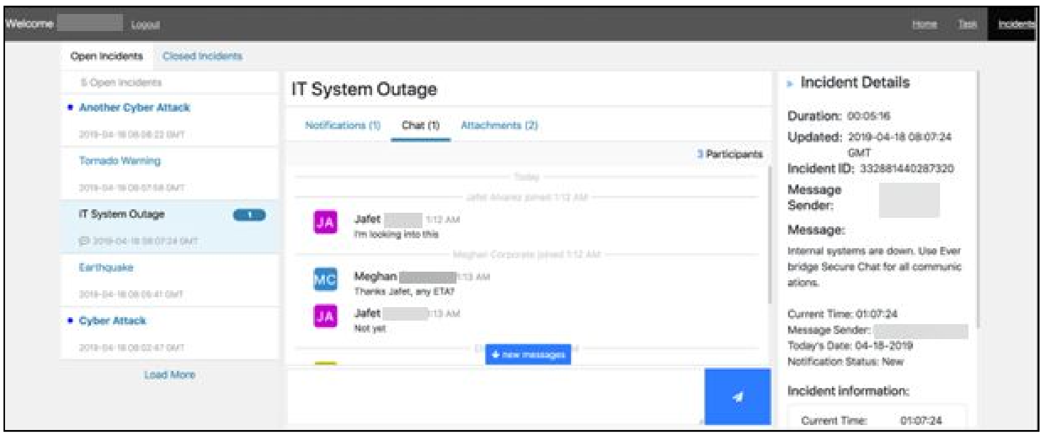


3. When the Member Portal user selects an Incident, they can see the Notifications received for that Incident.

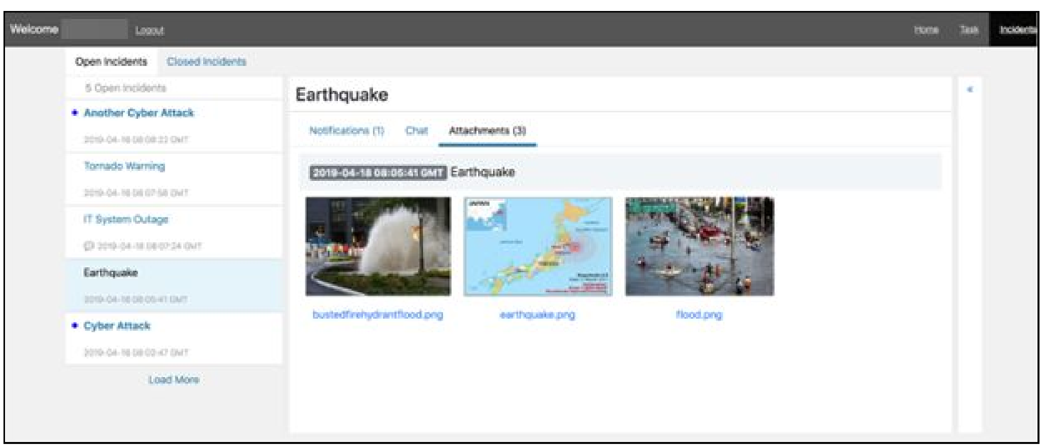
   The user will not be able to confirm Notifications from the Member Portal.



4. The user can also participate in the Secure Chat for that Incident from the Member Portal.



5. If any of the Notifications received for that Incident contain an attachment, those attachments will be available in the Attachments section for that Incident.



6. The metadata for the Incident, including the most recent variable values received for any Incident Notification, is available on the right-hand side of the page.

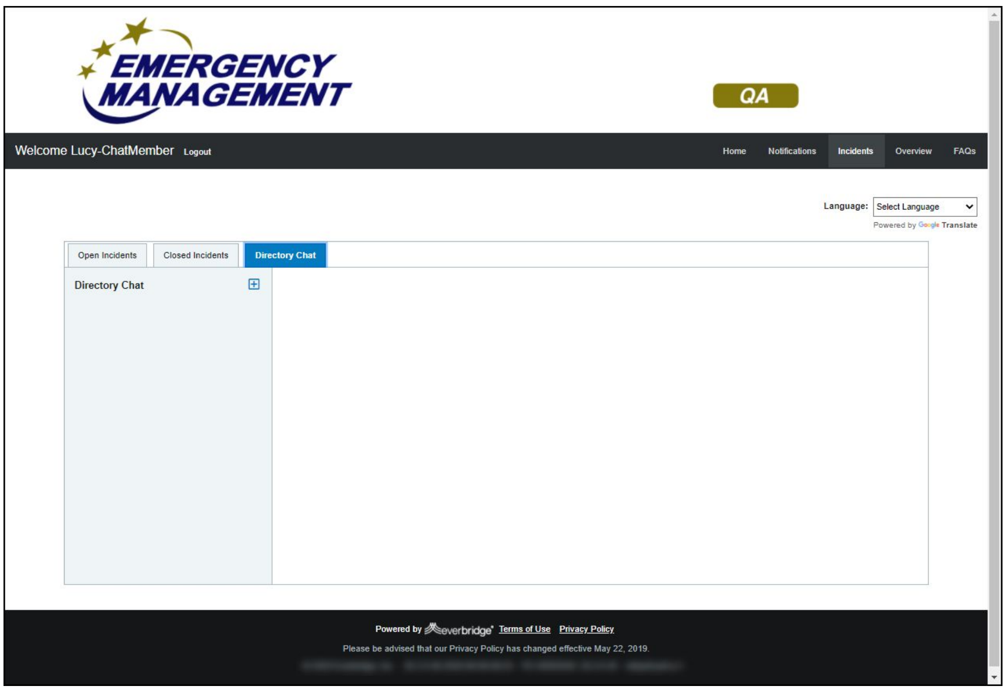

Welcome
Logout
Home
Task
Incidents
Open Incidents
Closed Incidents
5 Open Incidents
Another Cyber Attack
Tornado Warning
IT System Outage
Earthquake
Cyber Attack
Load More
IT System Outage
Notifications (1)
Chat
Attachments (2)
3 Participants
Meghan
Thanks Jafet, any ETA?
Jafet
Not yet
Ellen
Looks like phone lines our down too. I'll send an update notification to stakeholders.
Meghan
Please pull in Jason to look at the phones
Message:
Internal systems are down. Use Everbridge Secure Chat for all communications.
Current Time: 01:07:24
Message Sender:
Today's Date: 04-18-2019
Notification Status: New
Incident information:
Current Time: 01:07:24
Message Sender:
Today's Date: 04-18-2019
Notification Status: New

Using Directory Chat in the Member Portal

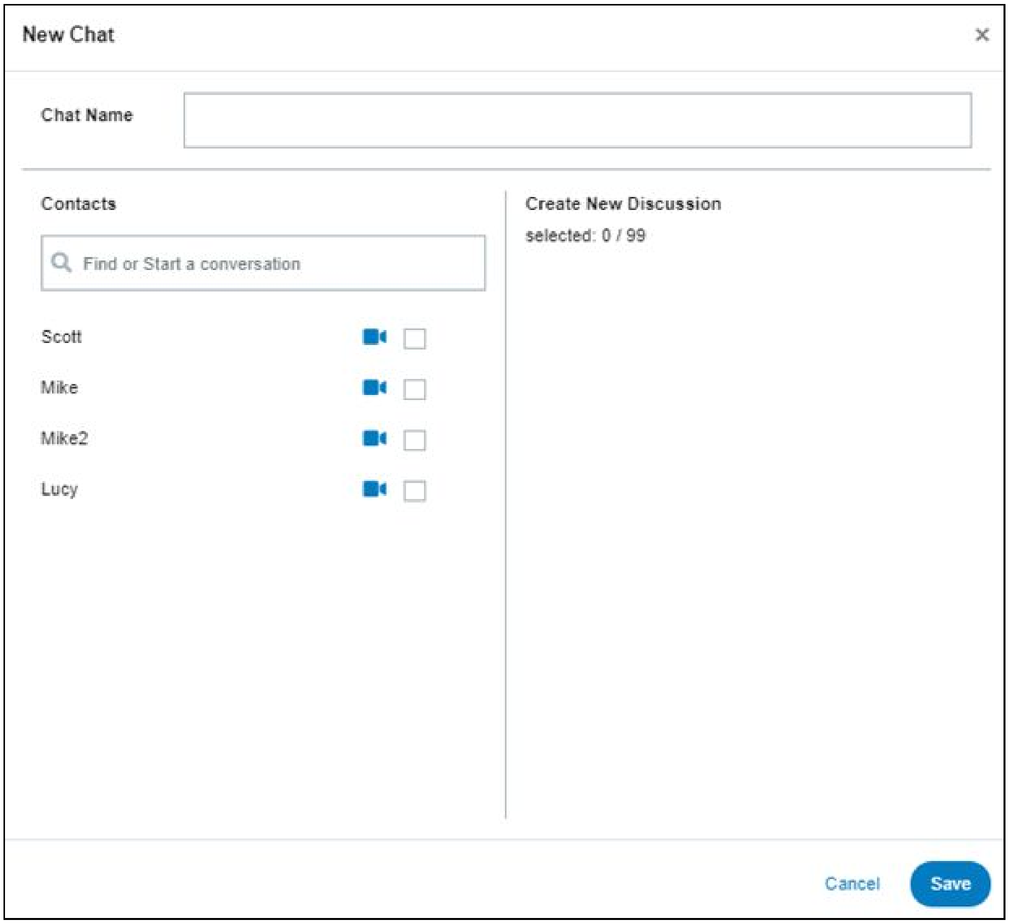
If your Organization has enabled **Secure Collaboration** > **Directory Chat** > **Enable Video Chat**, select the **Display Incident information** checkbox to enable Directory Chat in the Member Portal.

To use Directory Chat in the Member Portal:

1. Log in to the Member Portal.
2. Select the **Incidents** tab.
3. Select the **Directory Chat** subtab.



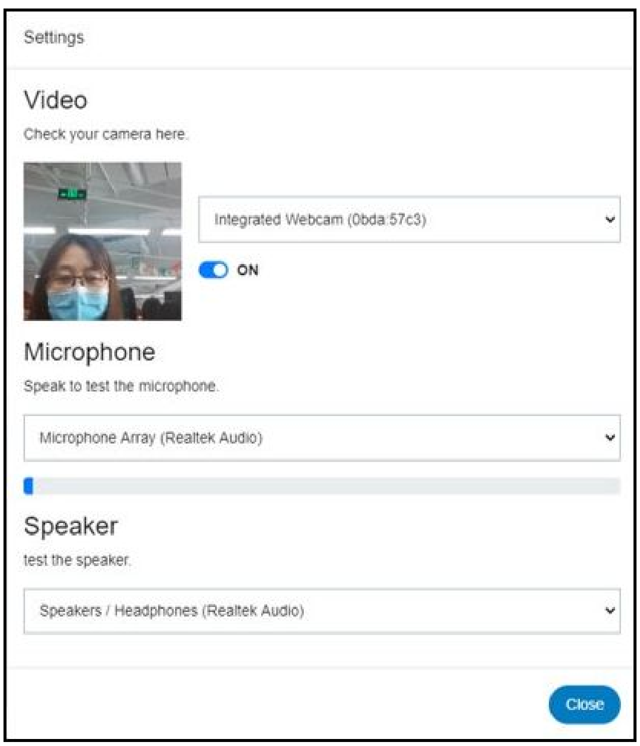
4. Click the **Plus sign (+)** to start a new directory chat. The New Chat window is displayed.



5. Enter a **Chat Name**.
6. If needed, search for the contact by name.
7. Click the check box next to a contact name to start a Text chat. The names are added to the **Create New Discussion** pane.
8. Click **Save**. The Chat Name is displayed along with the number of participants.
9. To Text chat, enter your text and/or click the **Paper Clip** icon to attach a file, then click **Send**.
10. To Video chat:
    - Click the **Video** icon in the upper right-hand corner of the panel to display the participant's list.
    - From the Participant's List, click the **Video** icon next to a contact's name. The **Calling** pop-up window is displayed.
    - Optionally, mute the audio and/or pause the video before the connection is established.
    - The contact receiving the call is shown a web browser notification and a pop-up window from which the contact can mute the audio and/or pause the video before the connection is established. To start the chat, the receiving contact clicks the green phone handle.

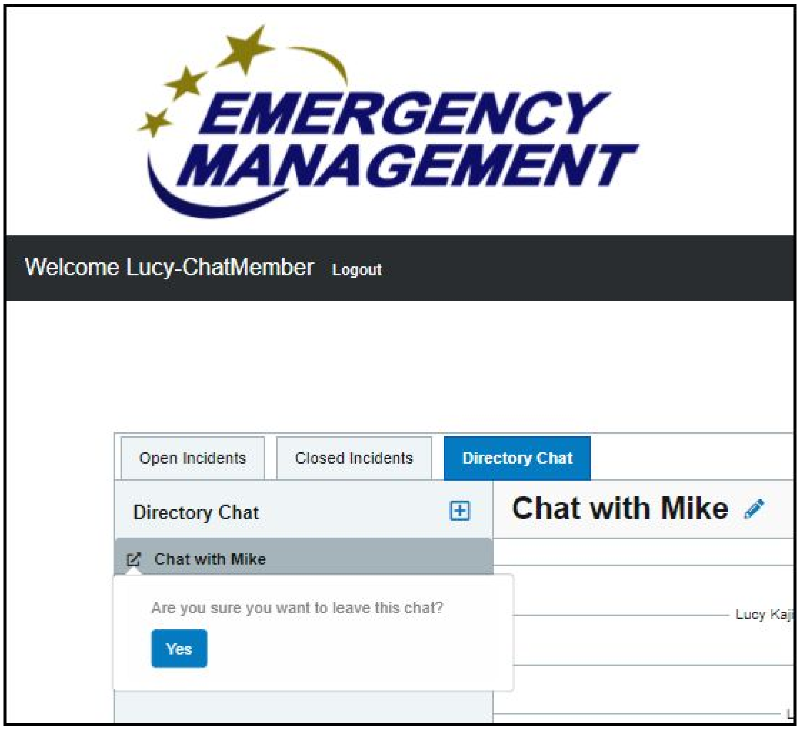
- A self-preview video is shown on the right-hand side of the screen. The caller can mute the audio and/or pause the video during the call. (If the receiving contact pauses their video, their name is displayed in the background to the other party. If the calling initiator pauses his or her own video, that person's video preview is not shown in the self-preview.)

- There is also a **Cog** icon to change the settings.



- After ending the video chat, click **Add More** to add more participants. Note that in the **Edit Chat** dialog, you can add more contacts, but you cannot remove the existing participants.

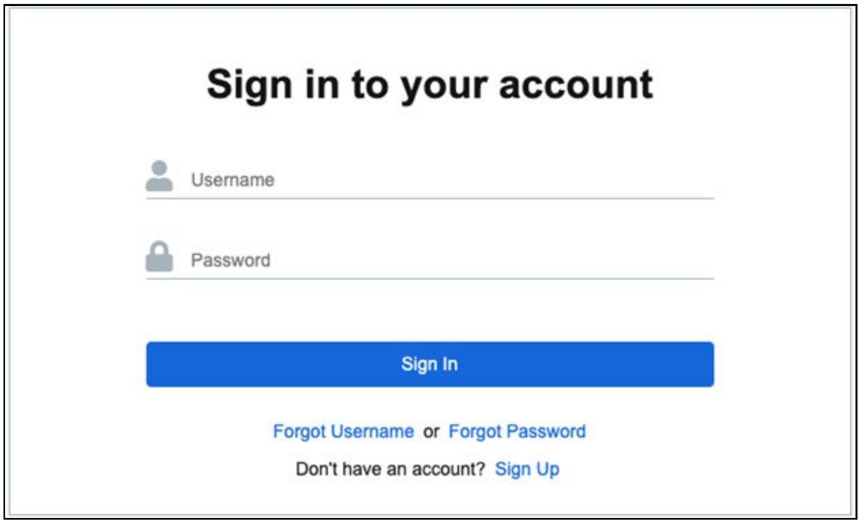
- Current participants can leave the chat by clicking the **Leave** icon (next to the Chat Name) and clicking **Yes** to confirm.



Using Secure Chat in the Member Portal

Follow the steps below to use Secure Chat in your Member Portal.

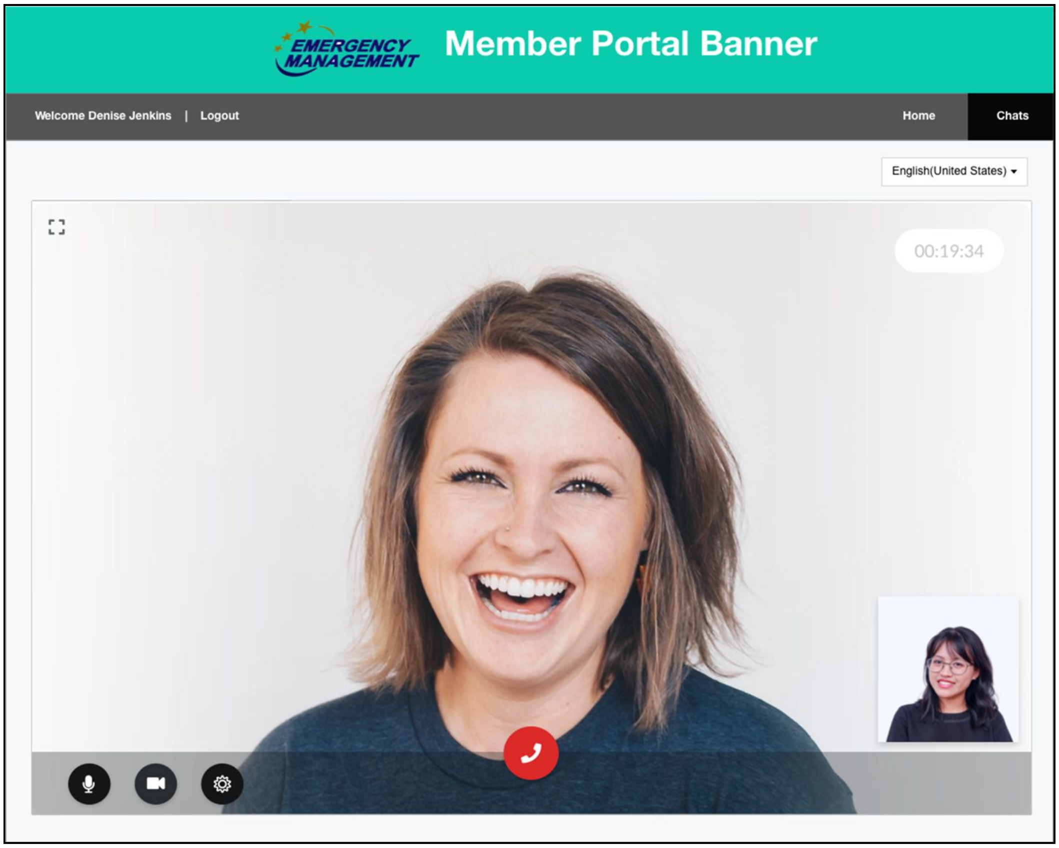
1. Open the link to your Organization's Member Portal and sign in.



2. Click the **Secure Chat** tab.
3. Click the **+ icon** to start a new chat.

4. Search for contacts with whom to chat, then click **Save**.
5. To send an attachment, click **the paper clip** icon in the Chat window.
6. To start a video call, click the **camera** icon next to the name of the contact to call.

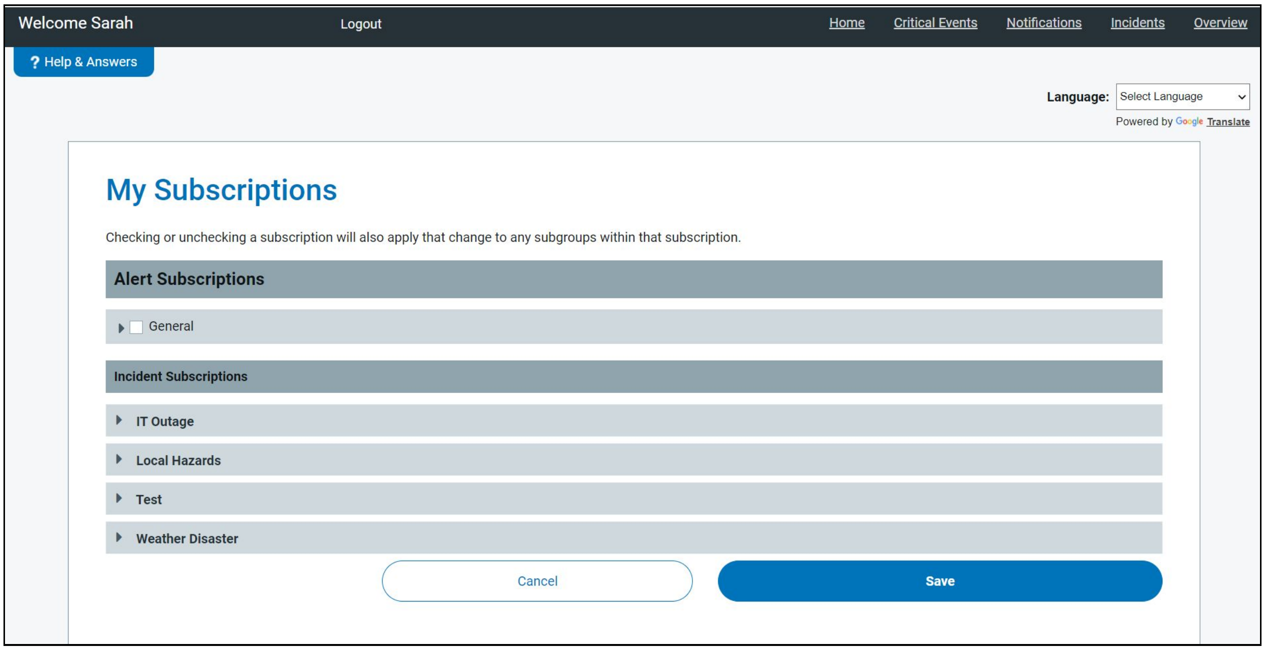
> **NOTE:** Your browser might ask you to allow permission to use your camera and microphone for the call.



7. Use the corresponding button to:
   - Pause the video - Click the **camera** icon.
   - Mute - Click the **microphone** icon.
   - Change the audio and video source settings - Click the **cog** icon.
   - End the call - Click the **red phone** icon.

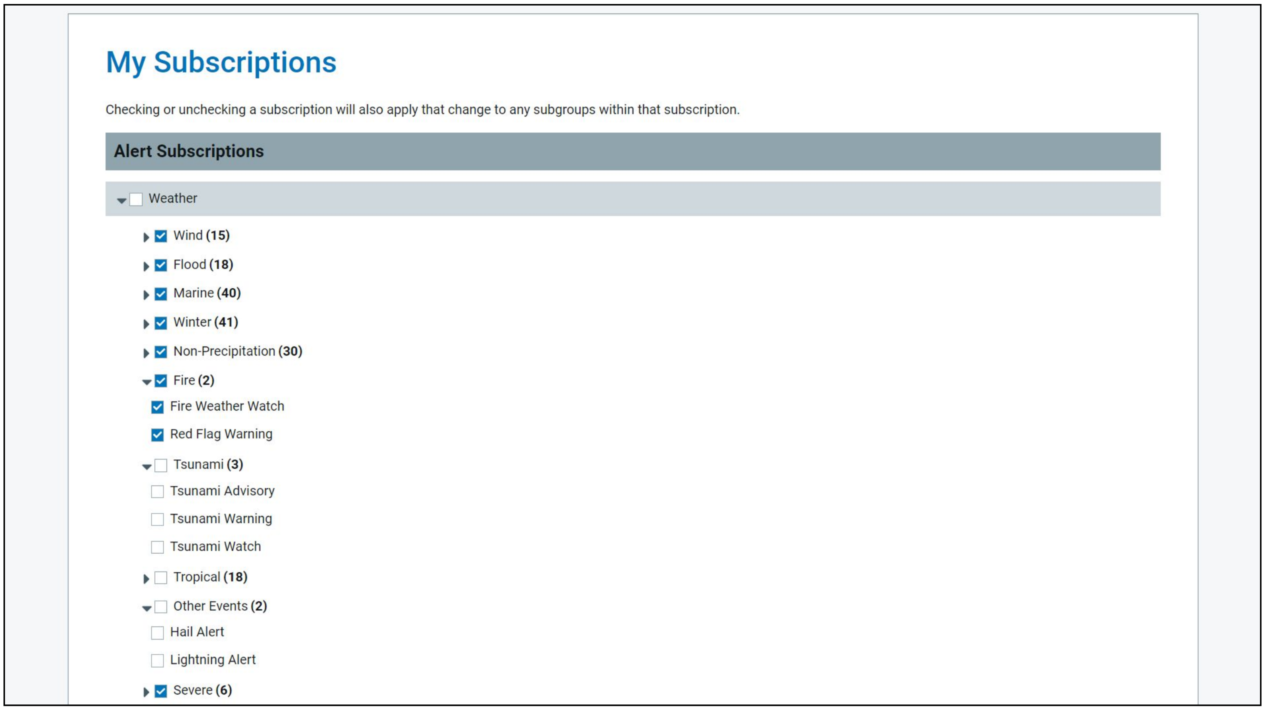
Viewing Your Member Portal (US Only)

After logging in to the Member Portal, click **Edit** next to My Subscriptions to display all the Organization's subscriptions.



Select the checkbox next to the alerts you want. For example, select **Weather Alerts** to see all the weather alerts.

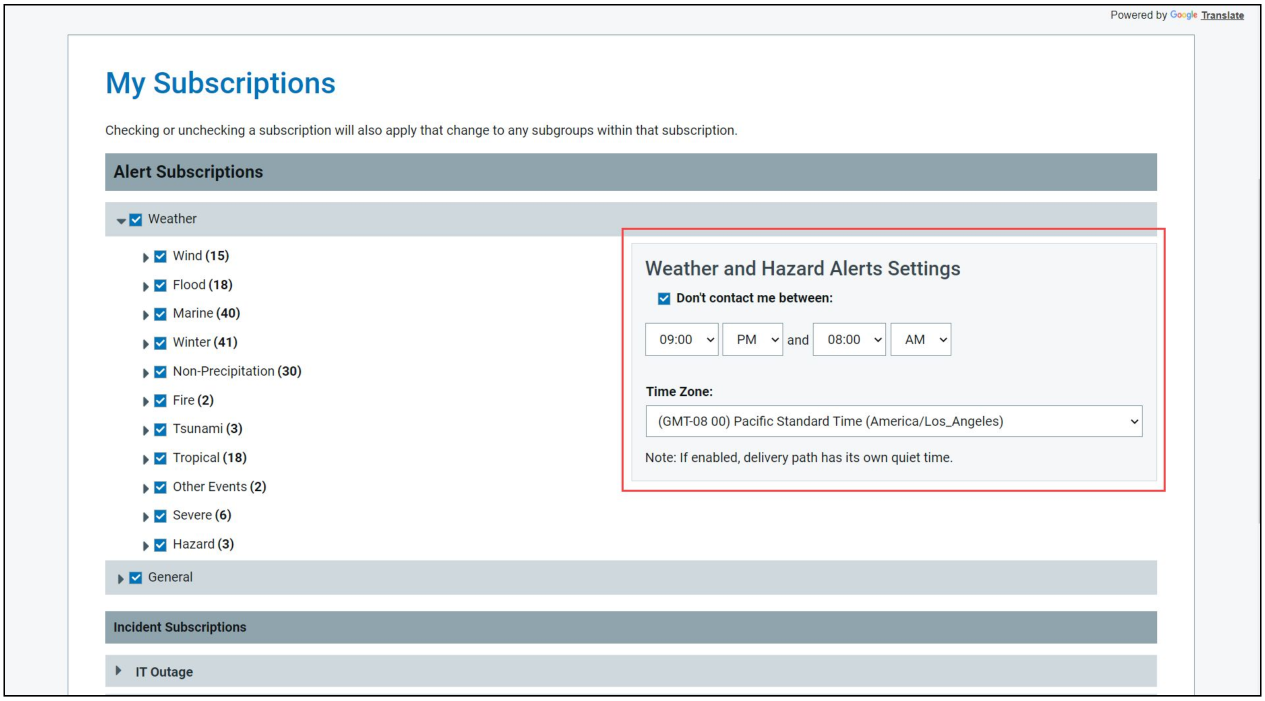
Click the **down** arrow to expand the alert list. Members can clear the checkboxes for the alerts they do not want to be made available.



The members can select the checkboxes for weather alerts they want to receive. They can select an alert by category (which selects all the alerts in that category) or individually. If they make any changes, they must scroll to the bottom of the screen and select **Save**.

NOTE: European weather alerts are not available for selection in the Member Portal.

If the Administrator set up Quiet Periods, the members can change the default time range. In the **Weather and Hazard Alerts Settings** pane, select the checkbox: **Don't contact me between**. Then, from the drop-down lists, select the time range and time zone. Select **Save**.

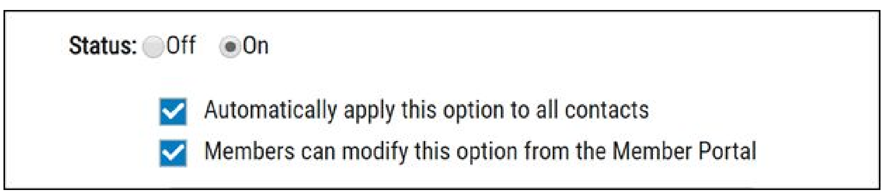


Quiet Period Settings (US Only)

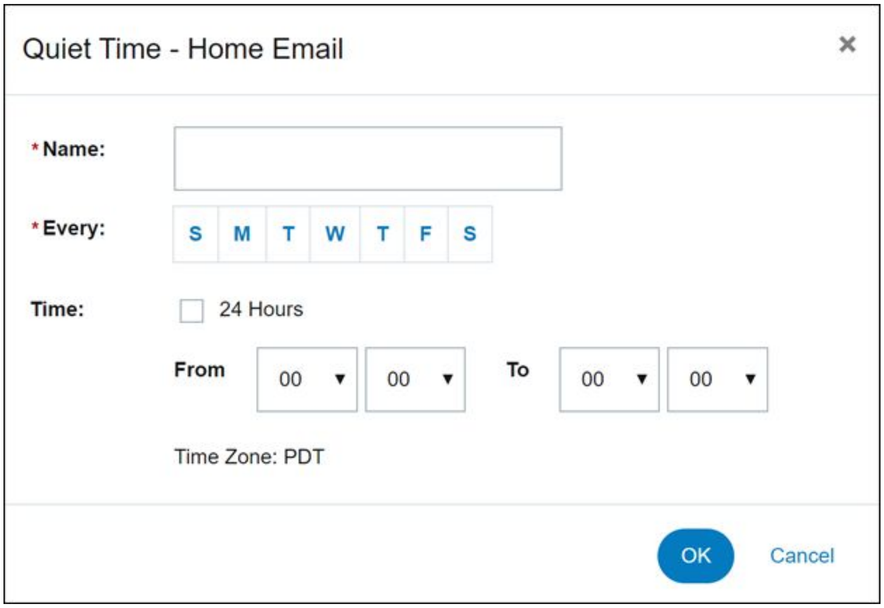
See the following four scenarios to set parameters for the behavior you want.

Scenario 1

Parameters



Member Portal Display



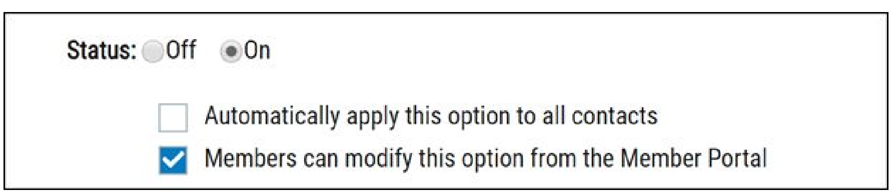
Current Behavior:

The quiet period settings defined at the Organization level are applied by default. Members can override the default quiet period settings from the Member Portal.

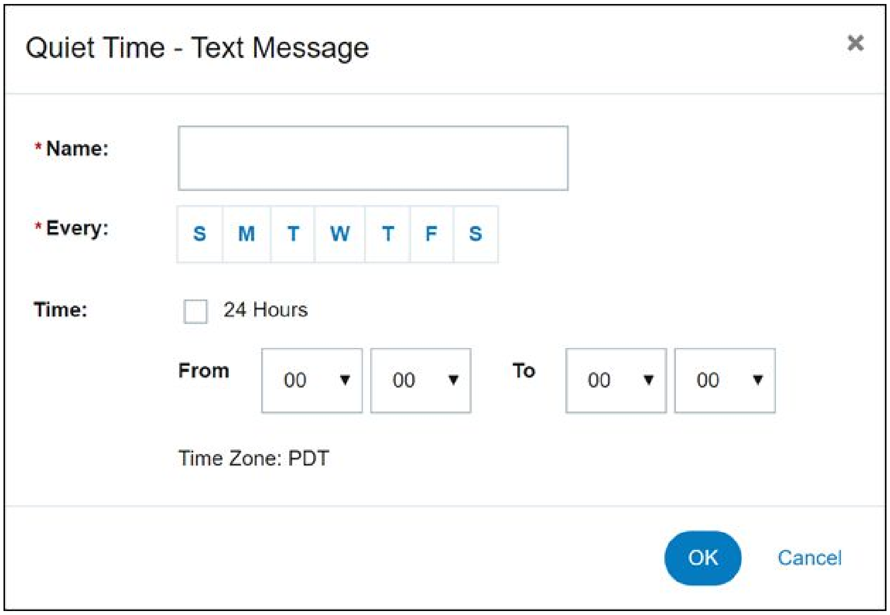
In the Member Portal, if you select the checkbox: **Don't contact me between**, make some changes, and save. Clearing the checkbox reapplies the Organization default quiet period settings (see this in Scenario 1 and Scenario 2 below).

Scenario 2

Parameters



Member Portal Display



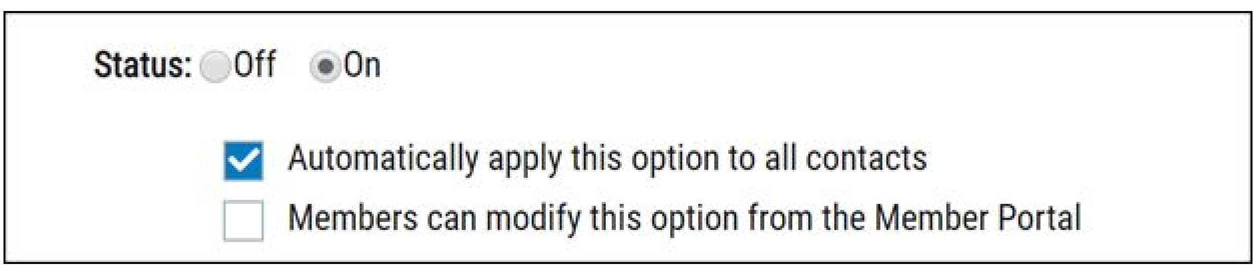
Current Behavior

The quiet period settings are not applied by default.

Members can activate their own quiet period settings from the Member Portal. (See Scenario 3 below.)

Scenario 3

Parameters



Member Portal Display

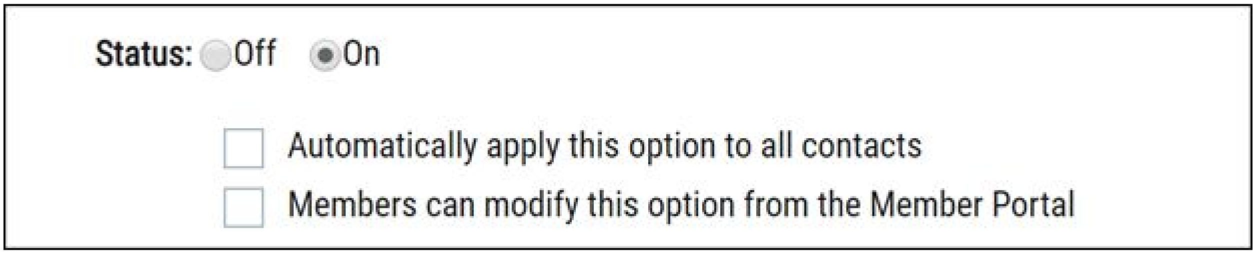
No display.

Current Behavior

The quiet period settings are applied by default. Members cannot see or change the quiet period settings from the Member Portal.

Scenario 4

Parameters:



Member Portal Display

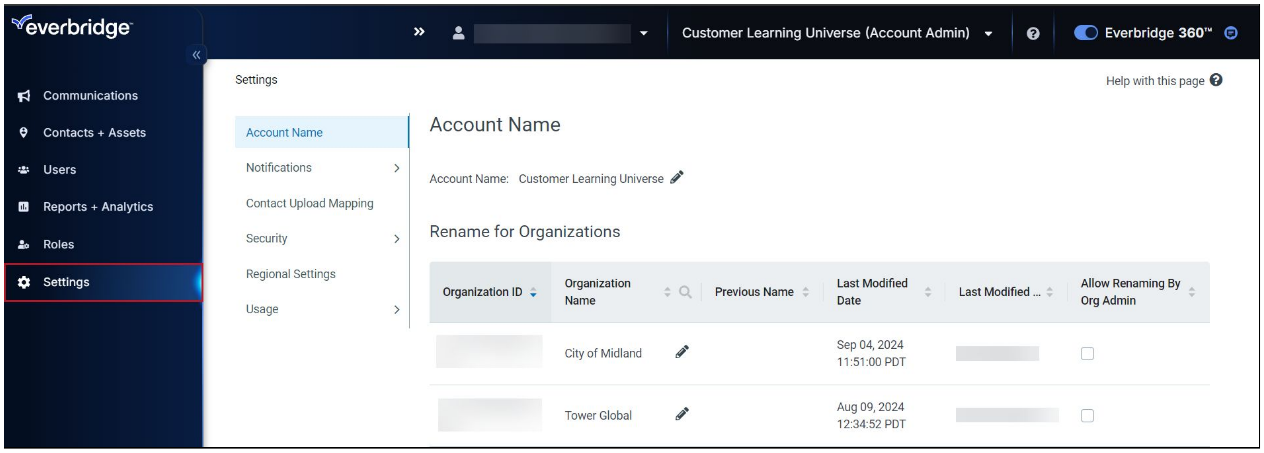
Not applicable.

Current Behavior

This configuration cannot be saved. It is equivalent to **Status=Off**.

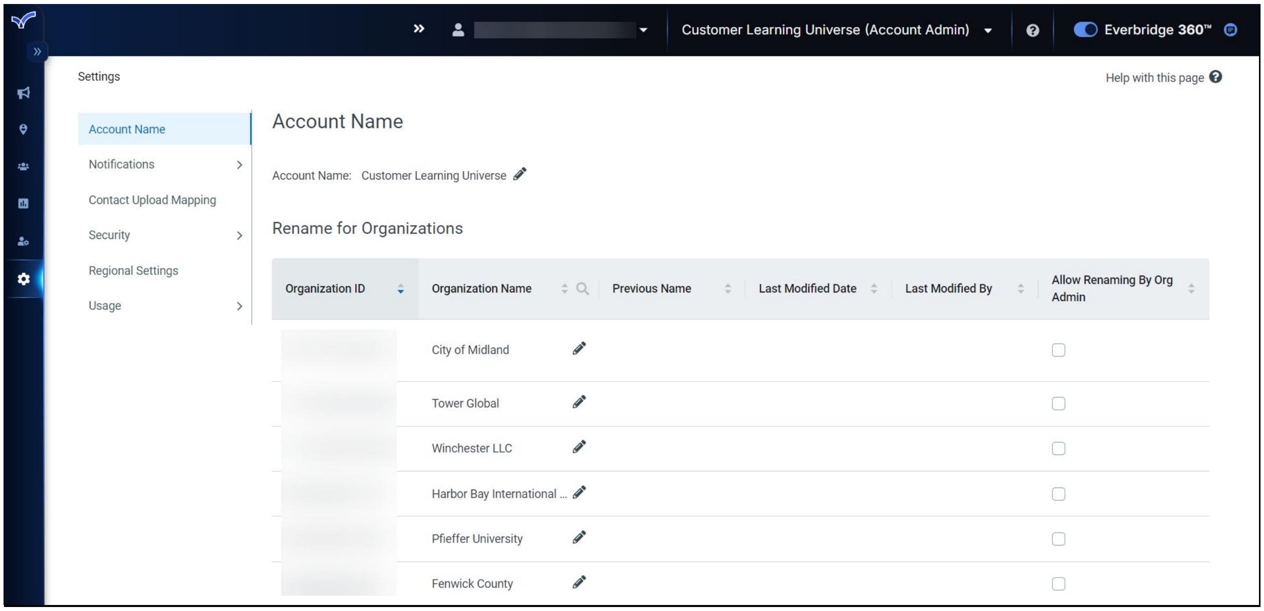
Account Level Settings

Account Administrators can configure settings at the Account Level, such as updating Account information or configuring security criteria. No other role can access these top-level items.



Account Name

The **Account Name** page allows an Account Administrator to rename the overall parent Account and its child Organizations. They can also grant permission to Organization Administrators to rename their own Organizations.

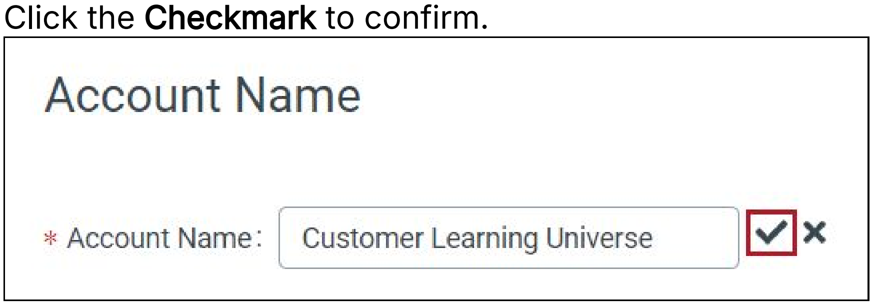


> **NOTE:** Renaming the Account or its Organizations should not cause any downstream issues, such as those related to authentication or API functionality.

Renaming the Account

To rename the Account:

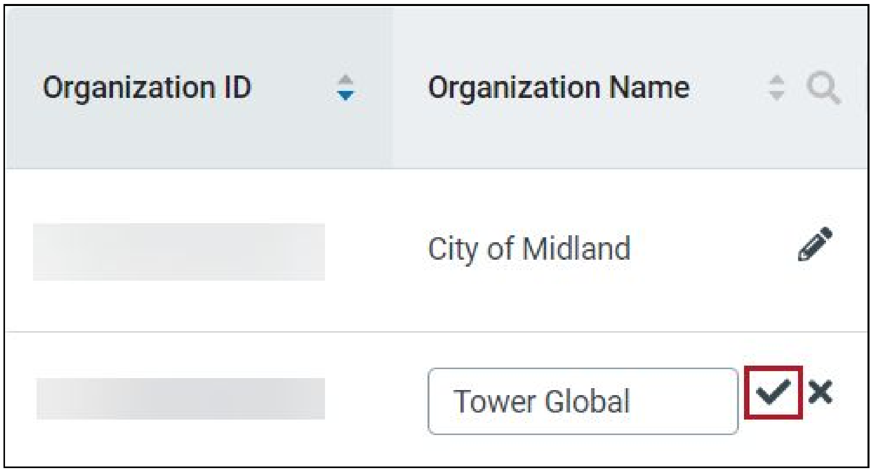
1. Click the **Pencil** icon next to the Account name.
2. Edit the name as needed.
3. Click the **Checkmark** to confirm.



Renaming an Organization

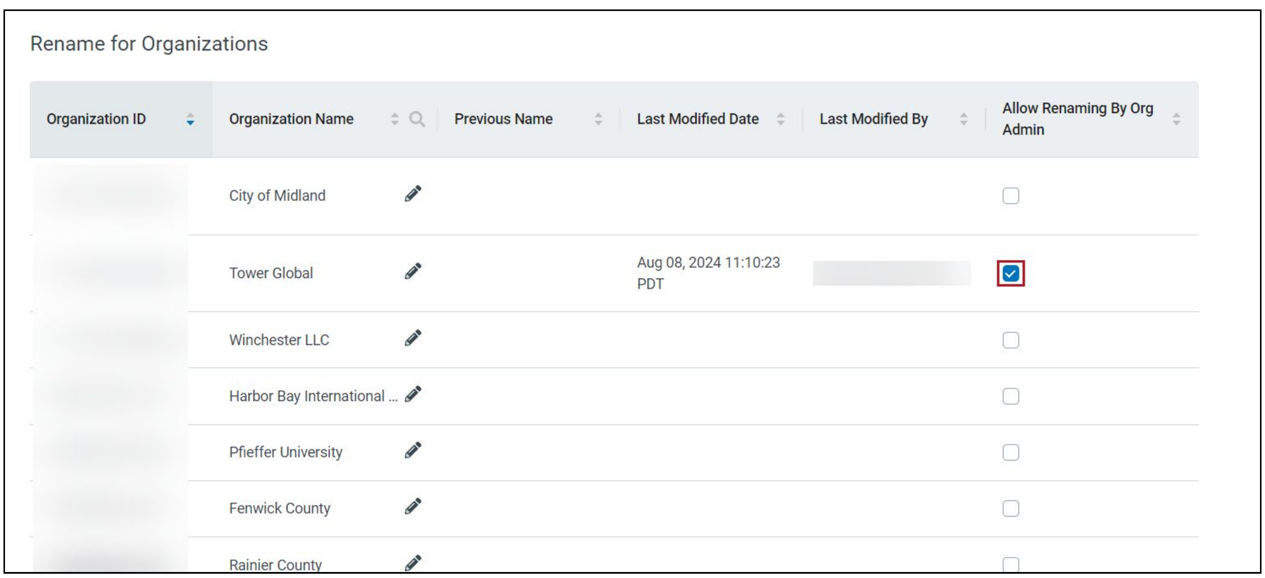
To rename an Organization within the Account:

1. Click the **Pencil** icon next to the Organization's name in the list.
2. Edit the name as needed.
3. Click the **Checkmark** to confirm.

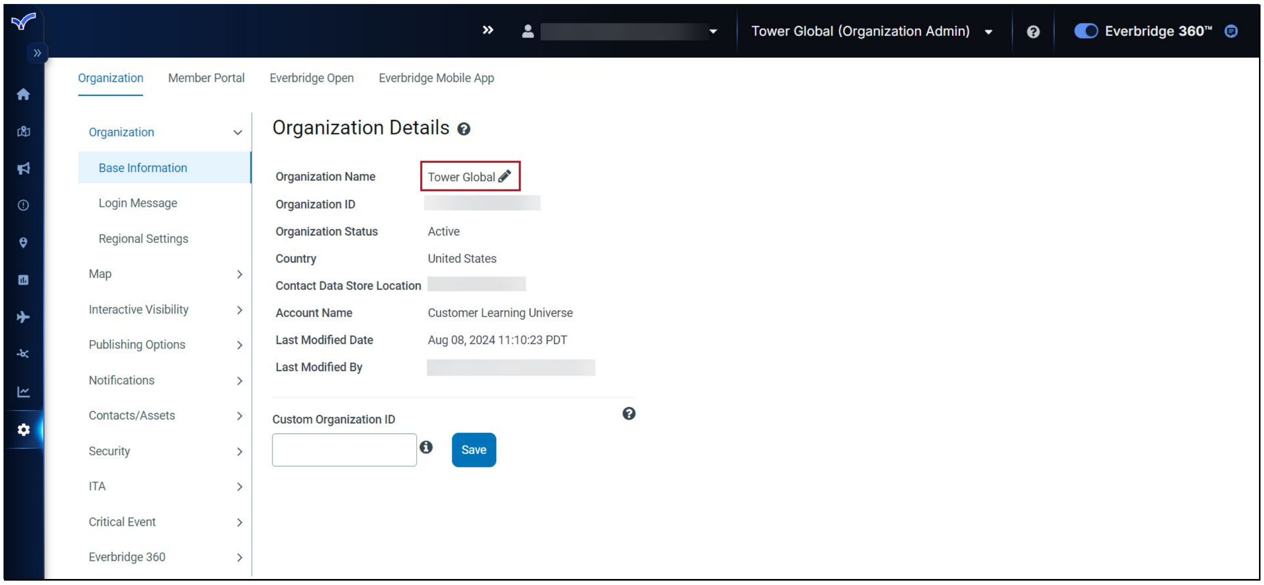


Enabling Organization Administrators to Rename Their Organizations

If Account Administrators want Organization Administrators to rename their own Organizations, they can enable it by selecting the **Allow Renaming By Org Admin** checkbox for the Organization in question.



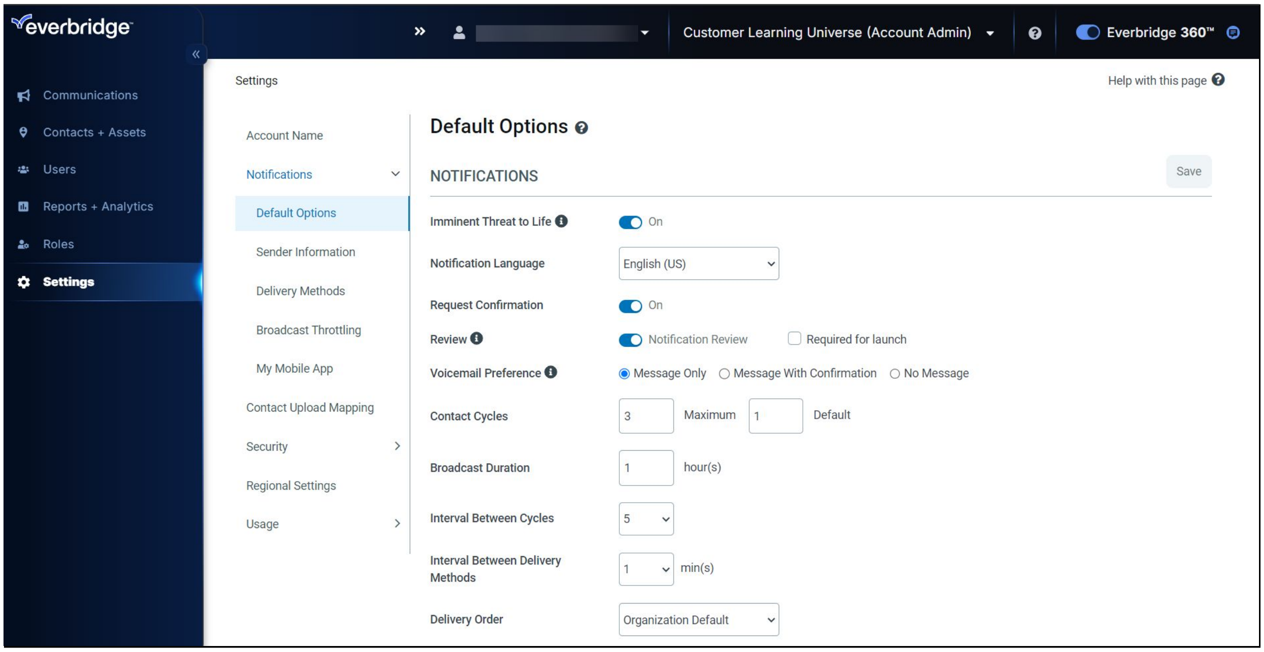
Organization Administrators with this enabled will now see the **Pencil** icon next to their Organization Name in **Settings** > **Organization** > **Base Information**.



Tower Global (Organization Admin)
Everbridge 360™
Organization
Member Portal
Everbridge Open
Everbridge Mobile App
Organization
Base Information
Login Message
Regional Settings
Map
Interactive Visibility
Publishing Options
Notifications
Contacts/Assets
Security
ITA
Critical Event
Everbridge 360
Organization Details
Organization Name
Tower Global
Organization ID
Organization Status
Active
Country
United States
Contact Data Store Location
Account Name
Customer Learning Universe
Last Modified Date
Aug 08, 2024 11:10:23 PDT
Last Modified By
Custom Organization ID
Save

Account-Level Default Notification Options

The **Default Options** page allows Account Administrators to configure the default settings for Notifications sent at the Account level.



From here, they can configure the following settings:

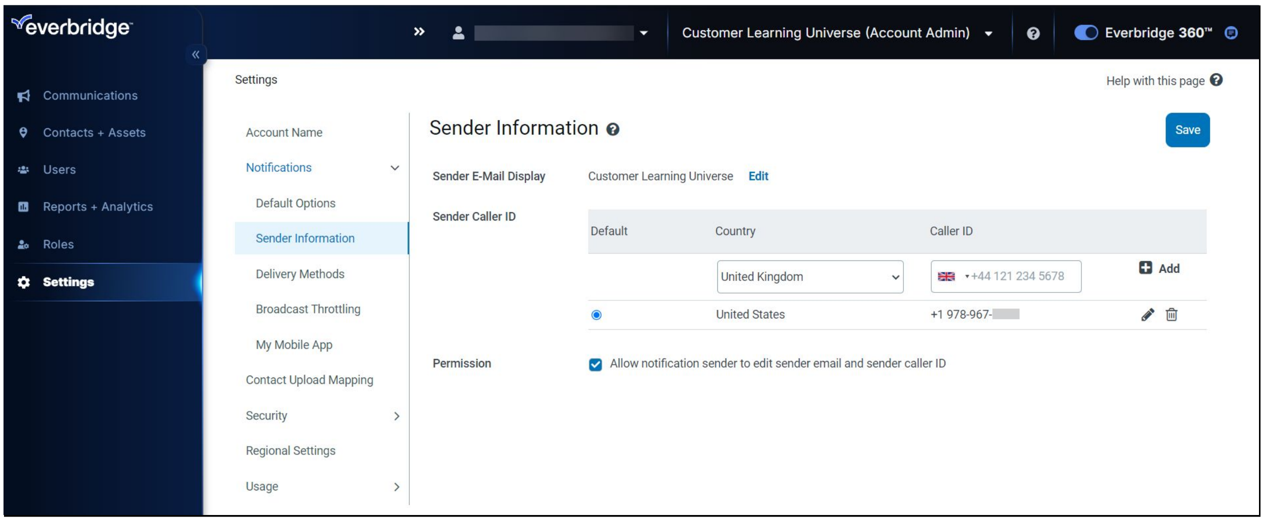
- **Imminent Threat to Life** - Allows users to designate that a Notification sent from the Account level poses a grave danger to people or assets in the immediate area. Toggle on if your Account uses Life Safety Notifications.
- **Notification Language** - Select the default Notification language. Includes the language-appropriate text or voice prompts in each message. Also used to convert your message text into an audio message for Notifications sent to a voice path. Your users can select another language when preparing a new Notification.
- **Request Confirmation** - Request a confirmation of receipt from message recipients. For example, in a Notification sent to an email address, Everbridge includes a hyperlink for the users to confirm receipt of the message. In a voice message, users are prompted to press a key. The Notification Report reflects who confirmed receipt of your Notification.
  - Everbridge recommends that this setting always be turned on.
- **Review** - Enable or disable the Review step for Notifications, and specify if it's required for launch.
- **Voicemail Preference** - How the system will react if it reaches voicemail when attempting to deliver a voice Notification. You can select whether to:
  - End the call (**No Message**)
  - Leave a message (**Message Only**)

  - Leave a message along with call-back information to confirm receipt (**Message with Confirmation**)
    - NOTE: Not applicable to Polling or Conference Notifications.
- **Contact Cycles** - Sets the number of times Everbridge Suite should attempt to notify contacts.
  - In **Maximum**, enter the highest number of cycles your users can use.
  - In **Default,** enter a default value for all new Notifications, which users can change this value before they send the Notification.
    - For example, if you send a Notification to contacts who have four devices in their contact record and the Broadcast Cycle is set to **2**, then Everbridge Suite attempts to send the Notification twice to all devices.
- **Broadcast Duration** - Controls how long Everbridge Suite will attempt to notify your contacts and how long contacts have to confirm receipt of a Notification. Ensure the duration is long enough to send all of the messages. If you have a lot of contacts to whom to send messages and the duration is too short, the Notification might not be delivered to all contacts. Everbridge recommends 12-24 hours.
- **Interval Between Cycles** - Controls how long the system will wait before trying the next cycle. Everbridge recommends 10 minutes between cycles.
- **Interval Between Delivery Methods** - Controls how long the system waits before moving on to the next delivery method for a contact. For example, if the contact has four delivery methods, then this is the length of time (in minutes) the system waits before sending the Notification to the next delivery method. If the contact confirms one path, then the system does not attempt a Notification to the subsequent paths. Everbridge recommends a three-minute interval between methods.
- **Delivery Order** - Select the order of the delivery methods used for the Notification:
  - **Account Default** - The order specified at the Account level in **Settings > Notifications > Delivery Methods**. This setting overrides the delivery method order specified in the contact record.
  - **Organization Default** - The order specified at the Organization level in **Settings > Organization > Notifications > Delivery Methods**. This option overrides the delivery method order specified in the contact record. Everbridge recommends this option as the delivery order.
  - **Contact Preferred** - The order specified in each contact's record.
  - **One-Time Custom** - Define the delivery method order for this single Notification; this option overrides all other delivery method orders.

Account-Level Sender Information

The Account-level **Sender Information** page is used for Notifications sent at the Account level via email and phone delivery methods. Use these features to identify yourself as the message sender to your Notification recipients, allowing you to obtain better confirmation rates.

Sender Information is configured from **Settings** > **Notifications** > **Sender Information**.



Click **Save** after configuring your Sender Information:

- **Sender Email Display** - Displays a sender name that your message recipients see in the **From** field when your email Notification arrives in their email inboxes from this Account.
  - Set the Sender Email Display to a value that motivates recipients to open your email as soon as possible. For example, "Security Desk", "City Police Department", or "Office of the President". To set the Sender Email Display, click **Edit**, type the identifier, and click **Save**.
    - It is recommended not to use an email address for the value of this field as its purpose is to represent a reader-friendly name, rather than an address. Additionally, using an email address may be a red flag for some downstream spam detection filters.
- **Sender Caller ID** - Use this option for Notifications sent to voice paths to display as the Caller ID when the recipient receives the call.
  - **Default** - If you add more than one Caller ID, then choose a default Caller ID. If a call is placed to a country that does not have a defined Caller ID, then Everbridge Suite uses the default Caller ID.
  - **Country** - From the menu, select the country corresponding to the Caller ID.

  - **Caller ID** - Enter the full phone number corresponding to the selected Country. For example, if you select **United Kingdom**, then the Caller ID must be a valid UK phone number without the "44" country code. NOTE: When setting a Caller ID, keep the following in mind:
    - The Caller ID should be a valid phone number that can be called back if needed. Invalid numbers (for example, 555-555-5555, 123-456-7890) can be rejected by telephone service providers and result in your Notification not reaching your recipients.
    - The Caller ID should include the local number, without the specific 1-to-4-digit country code. (Everbridge Suite adds the international codes automatically when sending the Notification.)
    - The Caller ID value selected as Default is used when sending Notifications to any country not listed.
  - **Sender SMS ID** - Use this option for Notifications sent to SMS paths to display as the Sender SMS ID when the recipient receives the message. Custom SMS IDs will only work when supported by the local carrier. Updating SMS IDs may impact Sender SMS ID settings for existing Notification templates.
    - **Country** - From the menu, select the country corresponding to the SMS ID.
    - **SMS ID** - From the menu, enter the ID. This ID must 3-11 characters in length. The Sender SMS ID for all countries (except the United Arab Emirates and Saudi Arabia) can begin with digits (0-9). The dash character (-) is not allowed.
- **Permission** - Select this checkbox to allow the Notification sender to edit the **Sender Email Address** and **Sender Call ID** settings.

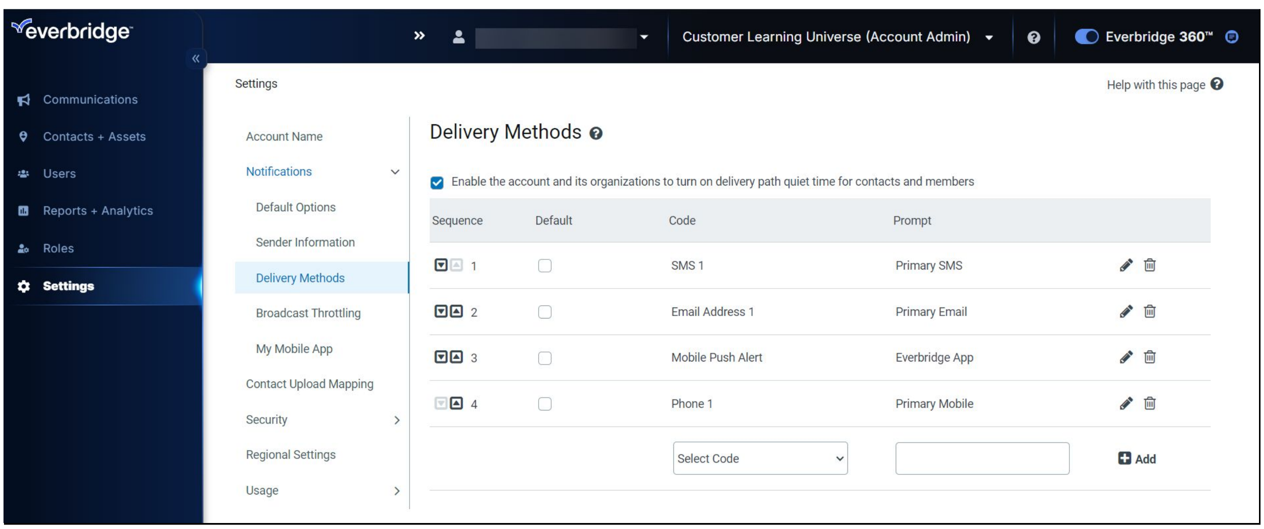
Delivery Methods

Delivery Methods specify how contacts can receive Notifications, including options like Email and SMS. These methods can be configured at both the Account Level (for Notifications sent from the parent Account) or at the Organization Level (for Notifications sent from its child Organizations).

Account Level

When configuring Delivery Methods from the Account Level (**Settings** > **Notifications** > **Delivery Methods**), Account Administrators can:

- Select any of the available Delivery Methods.
- Remove Delivery Methods.
- Assign a custom name for each Delivery Method so your users can select the correct one for their Notifications.
- Enable members to turn Delivery Methods on or off and specify quiet periods. For example, if a member sets a quiet time for 8:00 am-5:00 pm, all Delivery Methods will be turned off until 5:00 pm.

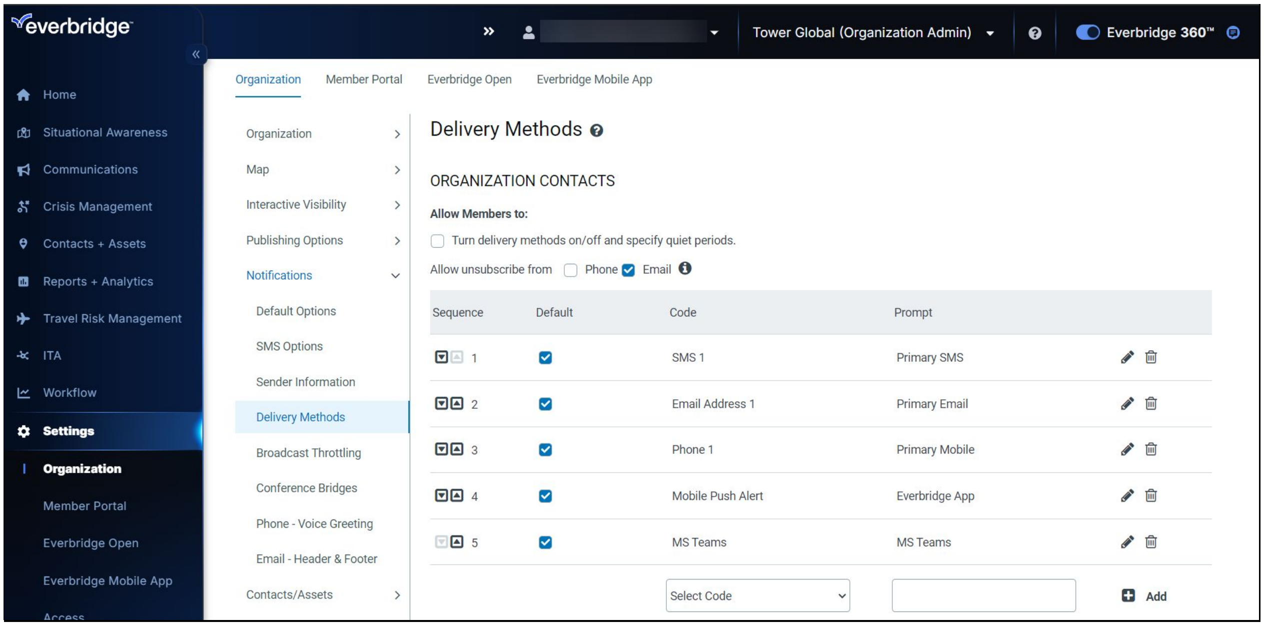


Organization Level

When configuring Delivery Methods from the Organization Level (**Settings** > **Organization** > **Notifications** > **Delivery Methods**), administrators can:

- Select any of the available Delivery Methods.
- Remove Delivery Methods.
- Assign a custom name for each Delivery Method so your users can select the correct one for their Notifications.

- If enabled at the Account Level, allow members to turn Delivery Methods on or off and specify quiet periods for the Organization.
- Allow recipients to unsubscribe from messages when they receive them via Email or SMS message.



Delivery Method Descriptions and Recipient Confirmation

The table below explains the various Delivery Methods and the different types of input required for a contact.

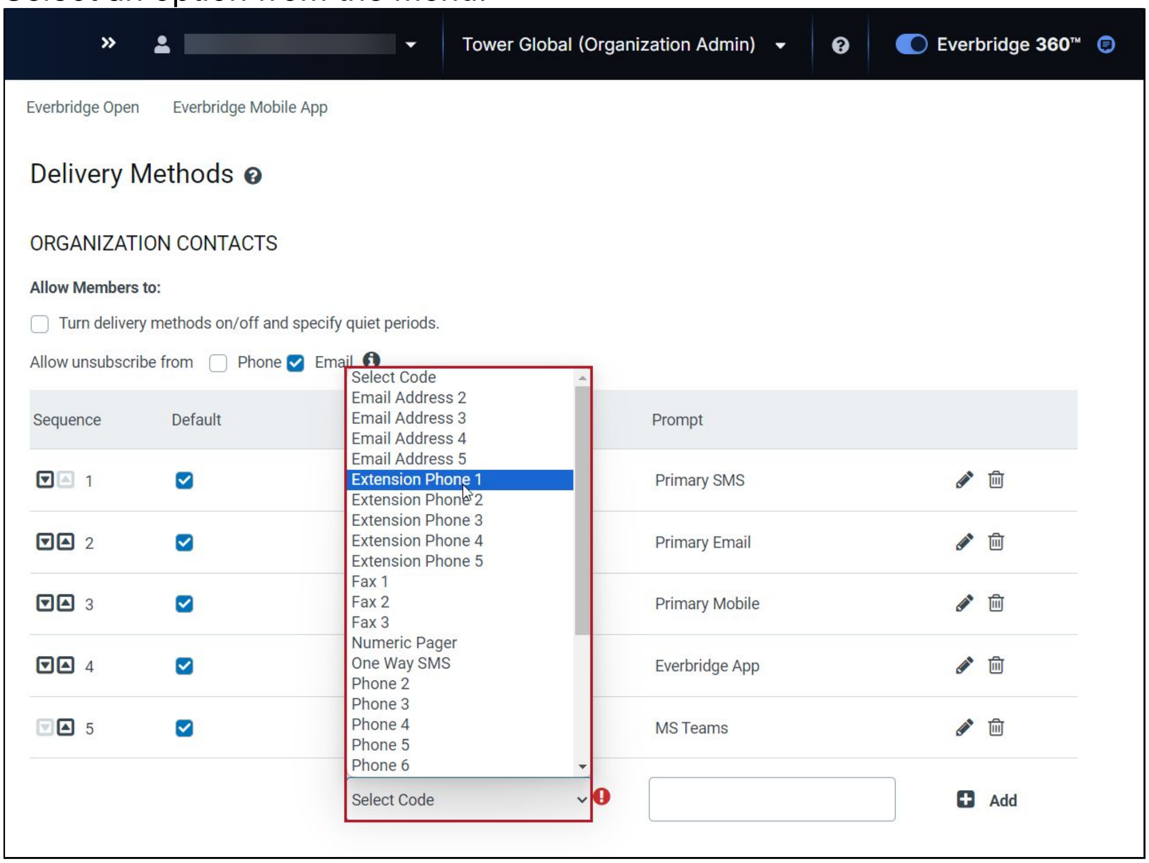
Delivery Method	Recipient's Message Format	Recipient Confirmation
Email Address	Content of Body field or Email Only field in the Notification Form.	Select **click here to acknowledge receipt of this message**.
Extension Phone #	Audio message.	• Press 1 after listening to the message. • Use the callback information to dial the phone number and enter the message ID.
Fax #	Content of the Body field in the Notification form.	Call the phone number and type the PIN provided on the fax.

Mobile Push Alert	The content of the Body field is displayed in the message field and the content of the Email Only field is an attachment to the message.	Use the REPLY feature in the app.
Numeric Pager	Audio message only.	Call the phone number provided and enter the PIN.
Everbridge Mobile App	Content of the Body as a push Notification. Content and Body in the Notification.	N/A
One Way SMS	Content of the Body field in the Notification.	Call the phone number provided and enter the message ID.
Phone	Audio message only.	• Press 1 after listening to the message. • Use the callback information to dial phone number and enter the message ID.
Plain Text Email 1-Way	Content of the Body field in the Notification.	Call the phone number provided and enter the message ID.
Plain Text Email 2-Way	Content of the Body field in the Notification.	Use the REPLY feature in the device.
SMS	Content of the Body field in the Notification.	Use the device's REPLY feature.
TAP Pager	Content of the Body field in the Notification.	Call the phone number provided and enter the message ID.
TTY	Content of the Body field in the Notification.	Call the phone number provided and enter the message ID.
MS Teams	Includes the Message Title and Body field in the Notification. Does not support attachments or two-way communications.	Confirm or answer polling questions using the included buttons.

Add a Delivery Method

To add a Delivery Method:

1. Click the **Select Code** menu at the bottom of the page
2. Select an option from the menu.



3. Type a prompt in the field next to the **Select Code** menu.
4. Click **Add**.

Configure Delivery Methods

Select from the following options to configure Delivery Methods:

1. Select the **DEFAULT** checkbox for the Delivery Methods you want pre-selected when a user creates a Notification.
    - The Notification sender can change the Delivery Methods for the Notification, but setting the defaults for the most common Delivery Methods saves time.
2. Select the appropriate checkbox to allow users to unsubscribe from phone and email delivery.
3. Define the sequence of the Delivery Methods by moving the Delivery Methods in the list.

4. Use the **Pencil** icon to edit the Prompt value or the Advanced Configuration of a Delivery Method.

Delete Delivery Method

To delete a Delivery Method, click the **Trash Bin**. The information is removed from the contact record, but the contact can add it again if needed.

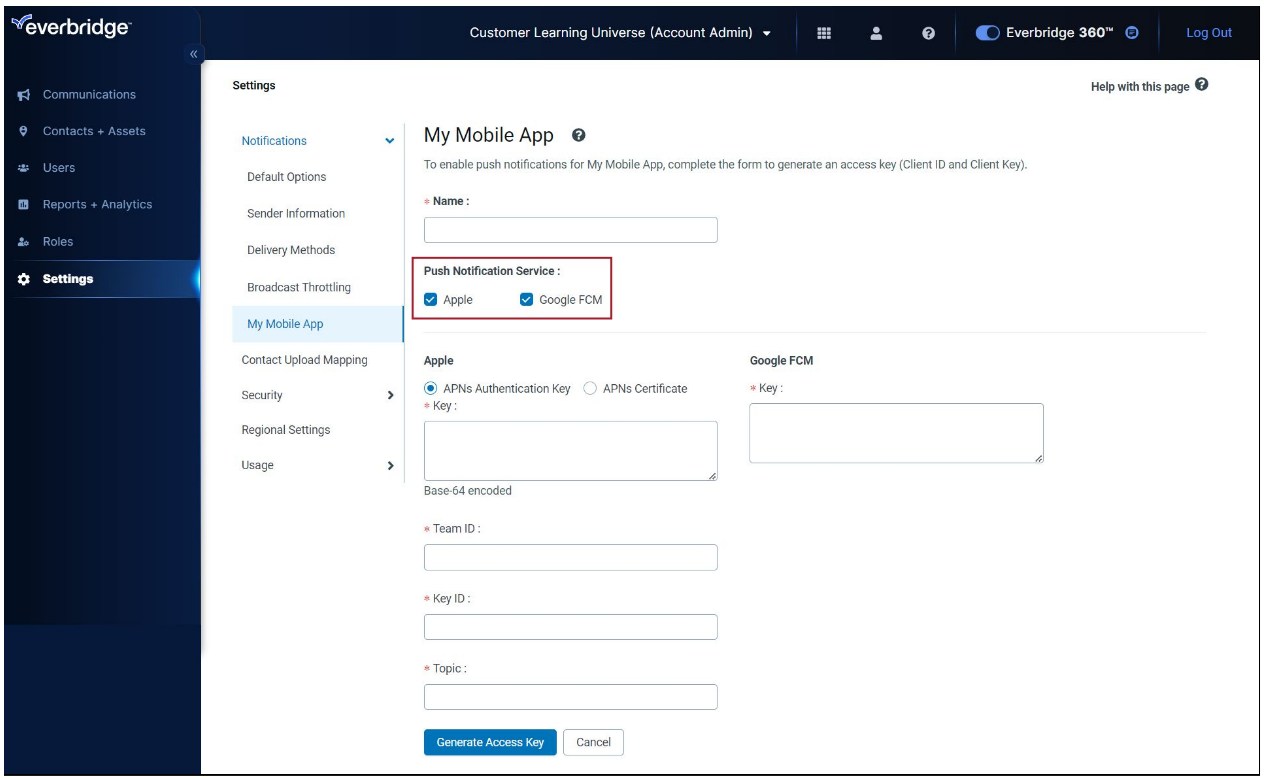
To delete a Delivery Method using the CSV file, the specific field and all of its corresponding fields must be empty. If any field still has content, then no changes occur in the contact record.

My Mobile App

Account Administrators who would prefer to use their own custom mobile app rather than the Everbridge Mobile App can configure its Notifications by going to **Account Settings** > **Notifications** > **My Mobile App**.

> **NOTE:** This feature must have already been enabled for the account for this section to appear.

First, enter the mobile app's name and choose between the Push Notification Service(s) you'll want your account to use. This can be either **Apple**, **Google FCM,** or **both**.



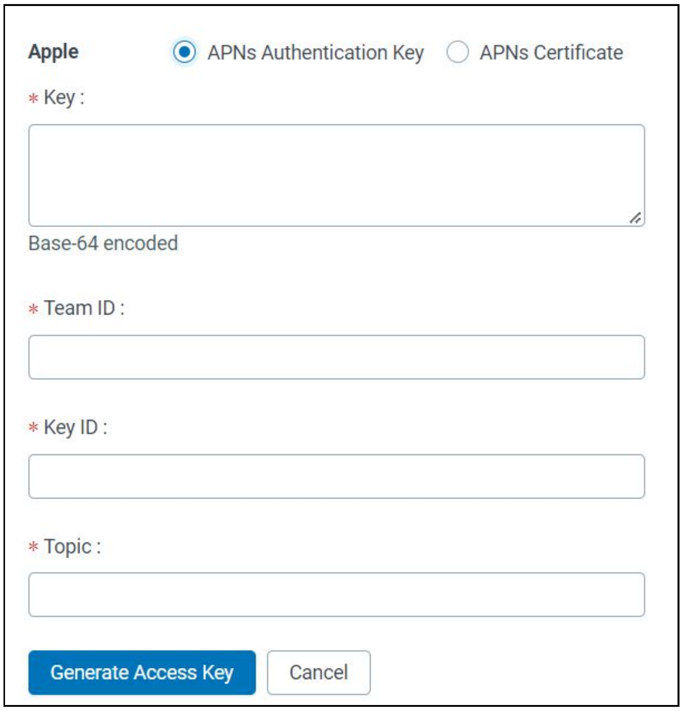
The next section will populate depending on which options were chosen above.

If **Apple** was selected, there are two additional options: **APNs Authentication Key** or **APNs Certificate**.

The **APNs Authentication Key** option fields will populate when selected:

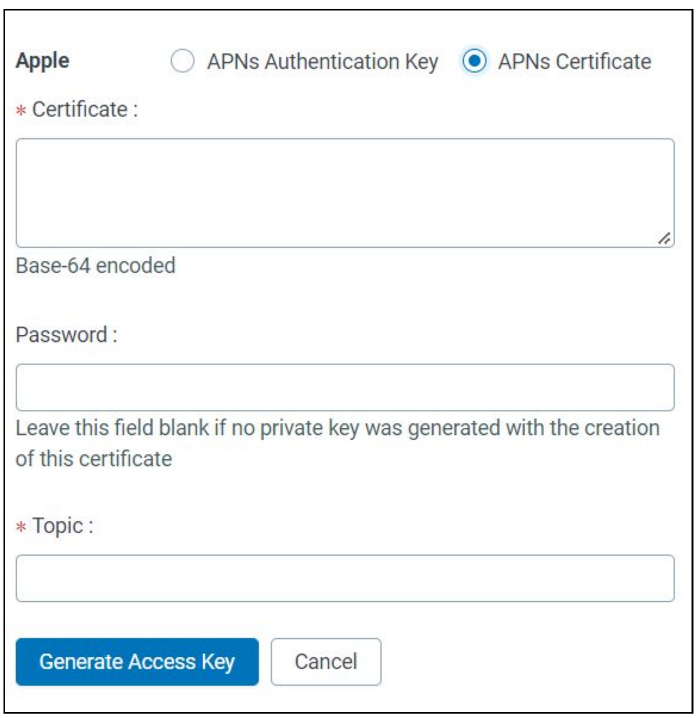
- Key
- Team ID

- Key ID
- Topic

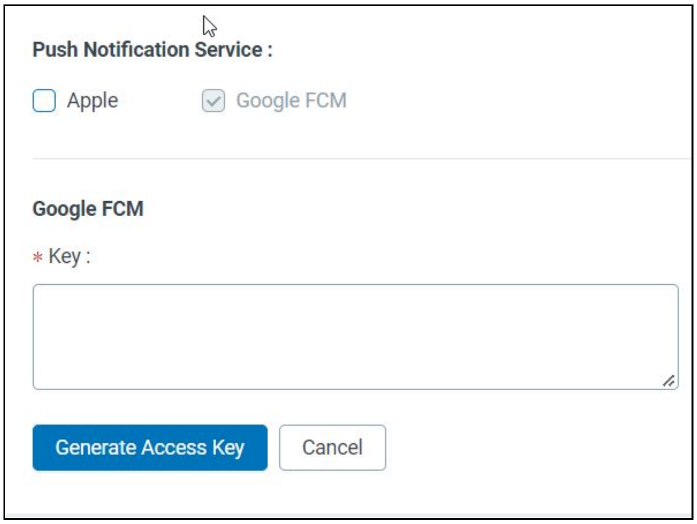


Choosing the **APNs Certificate** option will reveal the following fields:

- Certificate
- Password
- Topic



If you chose **Google FCM**, then only the **Key** field will appear.

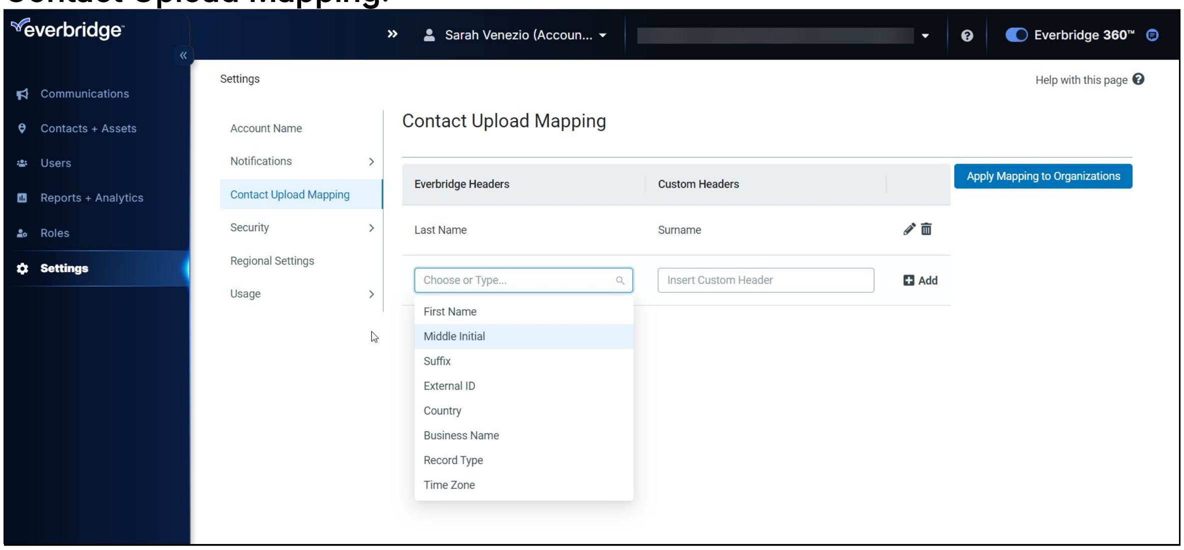


Regardless of which options you chose, once you have filled in the required fields, select **Generate Access Key.**

Contact Upload Mapping

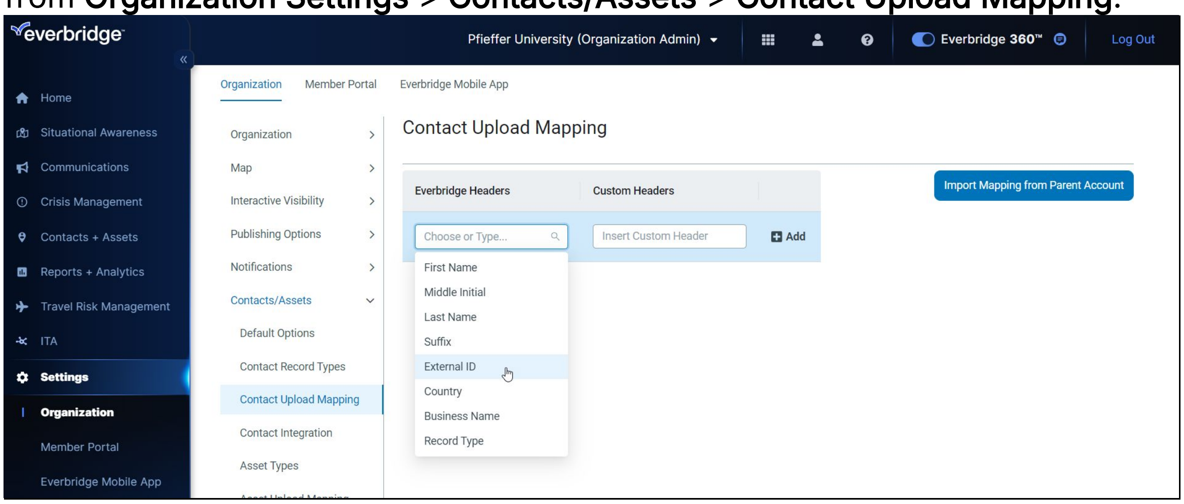
The Contact Upload Data Table provides details about the column headings, from left to right, of the Contact Template (a CSV file). The column headings must not be changed. If you use your own spreadsheet, ensure your column headings have the exact spelling and spaces. Administrators can streamline this process by mapping their own custom headers to standard Everbridge headers in one of two places:

- Account Administrators can do this at the Account level from **Settings** > **Contact Upload Mapping.**



  - If desired, click **Apply Mapping to Organizations** to apply these mappings to the Account's child Organizations.

- Account and Organization Administrators can do this at the Organization level from **Organization Settings** > **Contacts/Assets** > **Contact Upload Mapping.**



  - If needed, click **Import Mapping from Parent Account** to inherit the mappings set at the Account level and apply them to the selected Organization.

For some of the sections of the file, the template provides multiple copies of the data columns, like when the template provides for multiple locations. If your Organization only needs two locations, you can delete the extra Location columns to simplify your data file. You can also remove columns from other areas such as delivery methods and custom fields.

NOTE: Update adds new contacts if the External ID does not already exist. If the External ID already exists, the contact is updated with the new contact attributes. **Replace** overwrites the existing contact list with only those contacts that match the External ID in the CSV data file. It adds new contact records if the External ID is in the CSV file but not in the database.

CAUTION: Using **Replace** deletes contact records if the External ID exists in the database, but not in the CSV file.

If you are updating data for a contact, it is not necessary to use all of the columns. If a column is not in the file, the values for those fields are not updated and remain unchanged.

To remove a value from a contact during an update, include the column in the upload file, but leave the cell empty. For example, to remove a delivery method for a contact, leave the column headers in the CSV file, but delete the device information from the cells.

The last two columns in the Contact Upload Data Table table explain what happens when you make changes to the CSV file. There are four scenarios:

- UPDATE results when changing an existing value to a new value.
- UPDATE results when leaving cells empty that were previously filled in.
- REPLACE results when changing an existing value to a new value.
- REPLACE results when leaving cells empty that were previously filled in.

NOTE: In **Settings > Contacts and Groups > Additional Settings**, if you use the **Date** data type, its format is: **YYYY-MM-DD**. In the respective **Custom Value** field, in the **Format Cells** dialog of Excel, you must modify the **Date** format. Select the values in the cells, then select the **Date** menu to choose **More Number Formats**. Select **Locale (Location): English (U.K.)** and **Type**:

2001-03-14 each time you use the data file, as the CSV file does not save format changes. Otherwise, you will always get the following error: **Additional information/attribute value is invalid**.

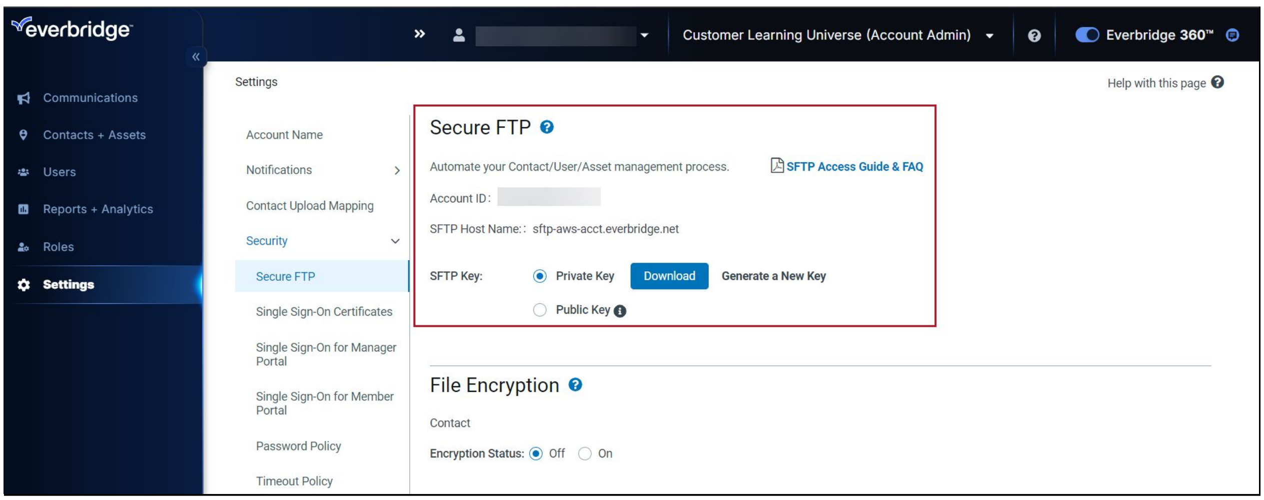
Geocoding

When a contact upload includes a latitude and longitude, those coordinates will be retained in the contact record and are visible in the Universe tab. Once the geocoding process has been completed, the coordinates are modified on the contact's record with the geocoded value.

Account-Level Secure FTP

Many Accounts use bulk upload methods to add and manage many contacts simultaneously. One way to automate the upload is to configure your system to add a Contact Upload file in the Everbridge format. You then script or schedule software that supports **Secure File Transfer Protocol** (SFTP) to upload your file to Everbridge.

Account Administrators can configure their Account-level SFTP options from **Settings** > **Security** > **Secure FTP**. The items configured on this page apply to SFTP uploads conducted from the Account level, such as contact or user uploads.



Using an automated system saves time and helps to prevent errors. You can use the Secure FTP software to manually upload files, allowing you to test your connection to Everbridge and ensure that your system is configured properly.

NOTE: If you plan to upload files manually, there is no advantage to using Secure FTP software instead of uploading through the Manager Portal.

Configuring SFTP happens in three stages:

1. Setting up authentication one of two ways:
    - Authenticate using a public key pair and add your public keys to Everbridge.
    - Authenticate using a private key.
2. Reviewing the details in Everbridge.
3. Setting up the SFTP connection.

NOTE: The examples presented in this document involve using a third-party tool, in this case, WinSCP. However, it is important to note that Everbridge does not endorse any particular third-party tool. These examples are solely intended for conceptual purposes and are designed to be applicable regardless of the specific third-party tool chosen.

Before you Begin

1. Download the PuTTYgen Tool at http://www.chiark.greenend.org.uk/~sgtatham/putty/download.html
2. Download your SFTP Software. For example, to download WinSCP, go to http://winscp.net/eng/index.php.

Authentication Setup

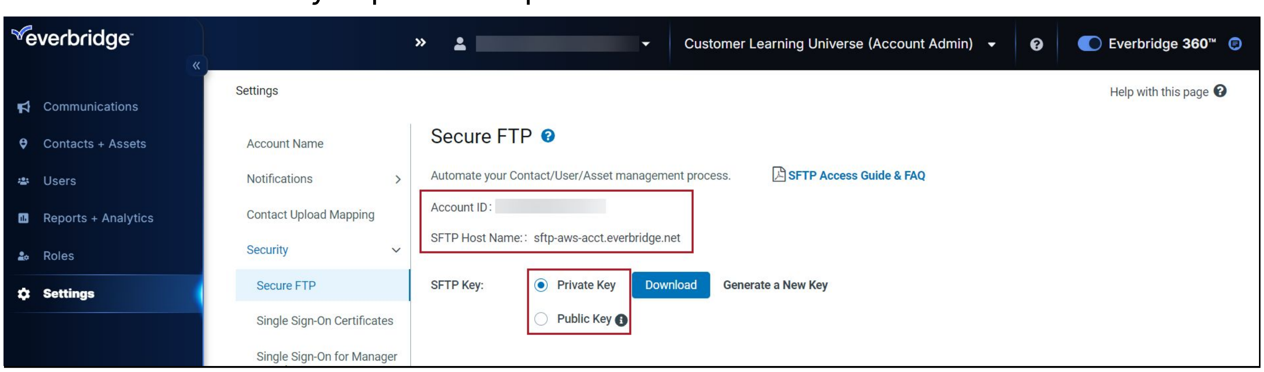
To authenticate using a public key, see the knowledge article Authenticating Using a Public Key for SFTP in Everbridge Suite.

To authenticate using a private key, see the knowledge article Authenticating Using a Private Key for SFTP in Everbridge Suite.

Review the Details in Everbridge

You will use the below information to set up the SFTP connection in the following steps:

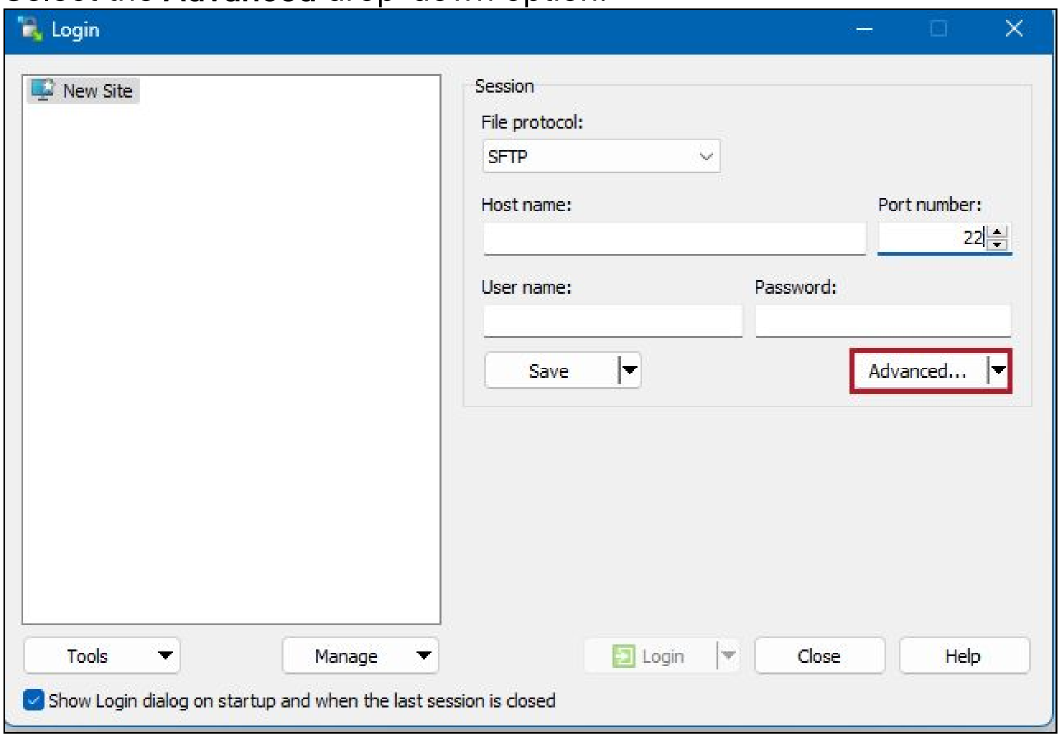
1. Log in to the Everbridge Manager Portal as an Account Administrator
2. Select **Settings** > **Security** > **Secure FTP** from the Account level.
3. Take note of the **Account ID** and the **SFTP Host Name** (each account's ID is unique and your Host Name may be different than the one shown below) and whether the key is private or public.



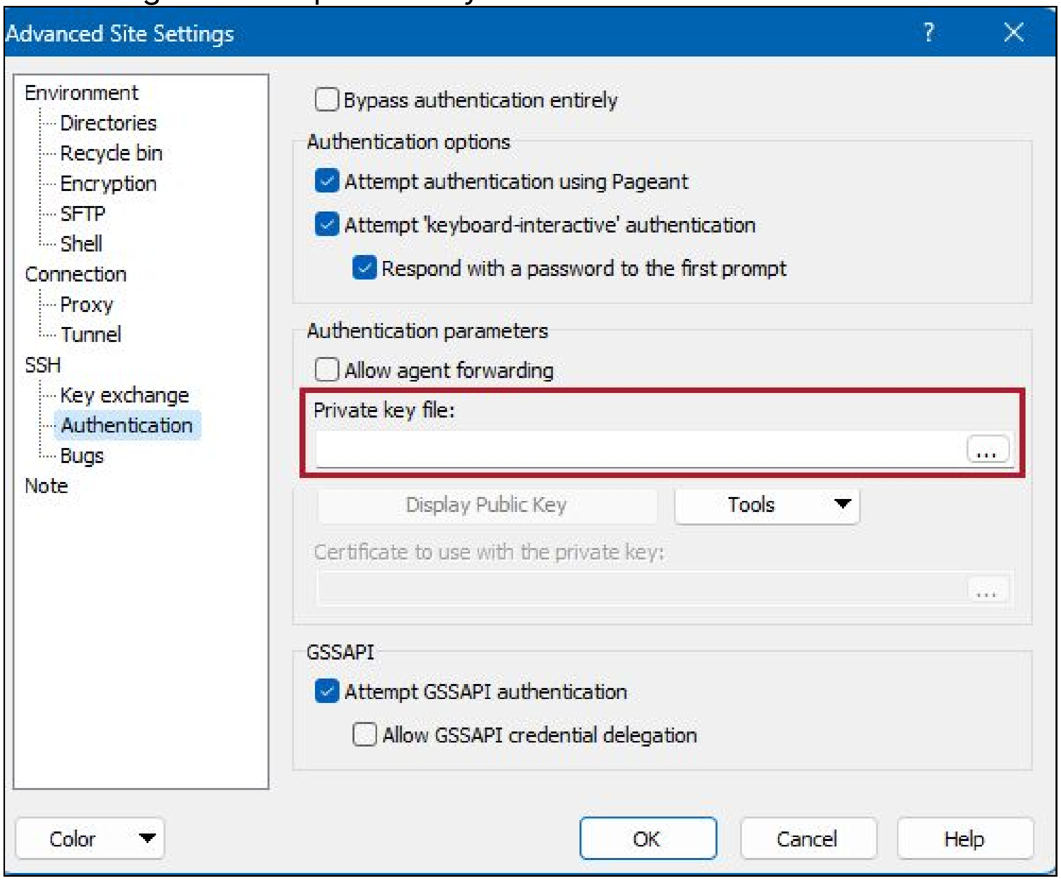
Set up the SFTP Connection

In this example, WinSCP is being used to illustrate the concepts:

1. Open WinSCP, which creates a session.
2. In WinSCP, add the host name from the above review to the **Host name** section.
3. Set the port to **22**.
4. Set the **User Name** to your Account ID from the above review. The password is not needed.
5. Select the **Advanced** drop-down option.



6. In either public or private key authentication methods, select Authentication, then navigate to the private key file and load it.

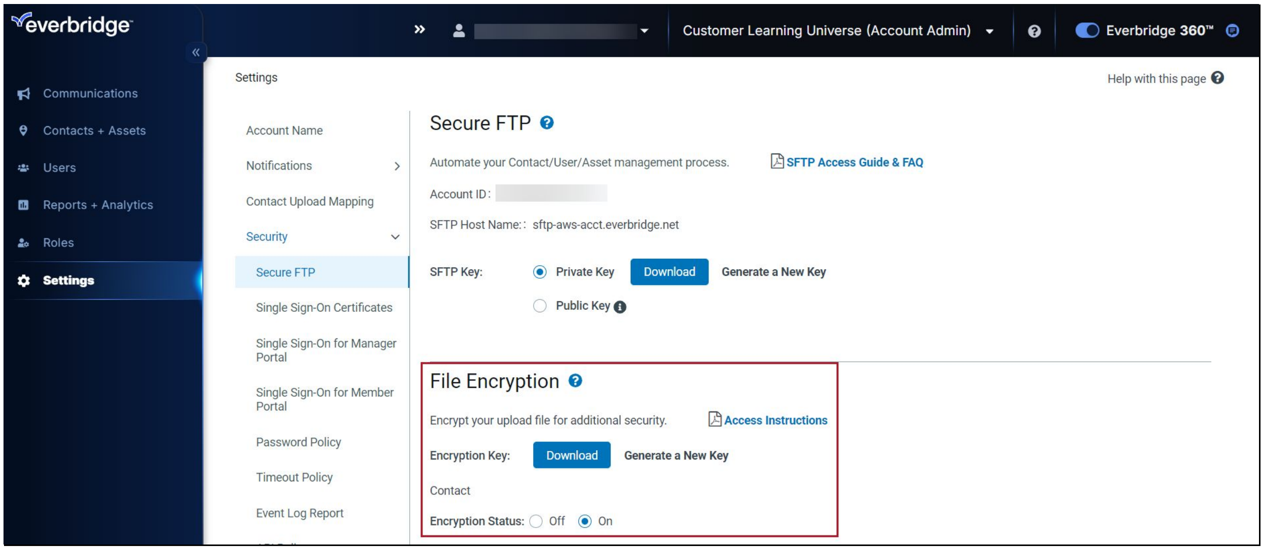


7. Click **OK**.
8. On the WinSCP home screen, choose **Login**.
9. Transfer the desired CSV file to the appropriate target Everbridge SFTP folder. For information on the target SFTP folders, see the knowledge base article Target Destination Folders for SFTP Contact Upload Files.

IMPORTANT: The file name cannot contain spaces.

File Encryption

File Encryption provides a standard encryption method (such as PGP) to generate encryption keys for Contact uploads conducted at the Account level.



By configuring your computer system and Secure FTP software to work together, they can automatically add and install contact data updates. 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.

SFTP software instructions are not provided in this document. If you have questions about using SFTP, contact your IT department or your Client Services representative.

To use File Encryption for additional security:

1. Navigate to **Settings** > **Security** > **Secure FTP**.
2. From the **File Encryption** pane, set the **Encryption Status** radio button to **On**.
3. Click **Access Instructions** to download the instructions.
4. Save the file to your desktop.
5. Follow the instructions from the downloaded file.

NOTE: If encryption is turned on in the Secure FTP settings and you want to upload a file that is not encrypted, you need to turn off encryption in the settings, upload the file, and turn encryption back on.

Single Sign-On Certificates

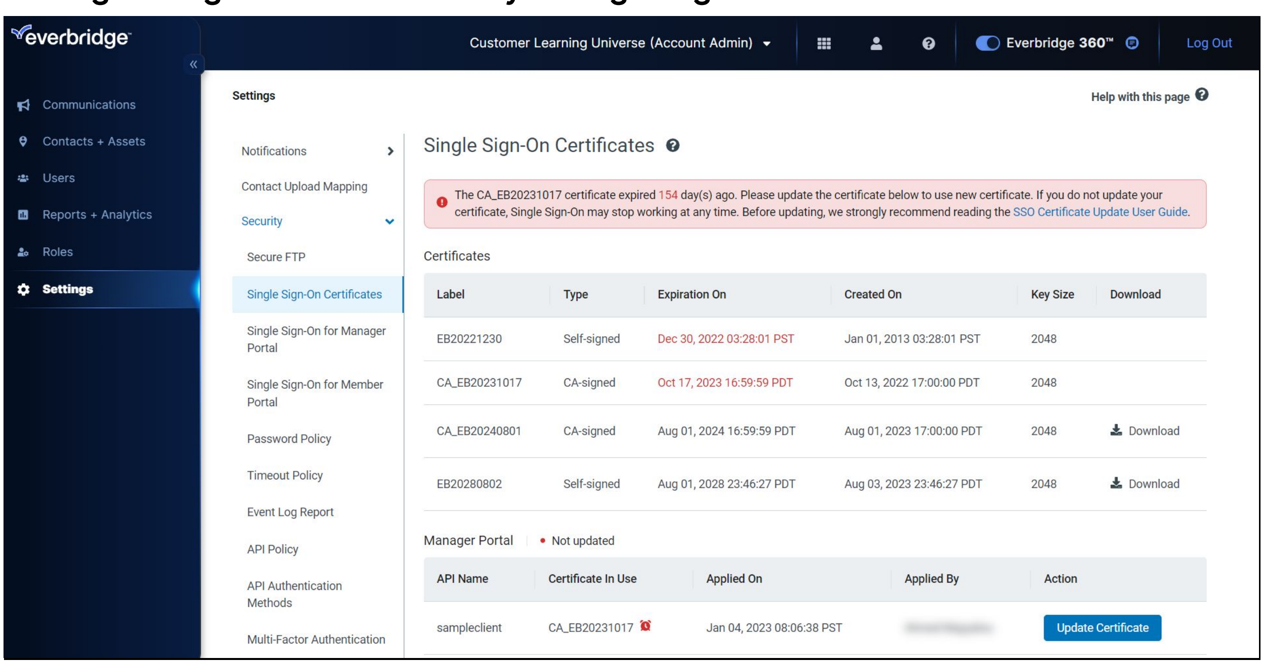
Single Sign-On certificates are used to sign the SAML request that the Service Provider (SP) sends to the Identity Provider (IdP) and/or to encrypt the assertion that the IdP sends back to the SP.

Although it provides additional security for applications that use the SAML authentication protocol, functionality to support signature verification and assertion encryption varies with different IdP types. You would need to check with a specialist in your IT department to confirm what your IdP supports and how.

All Single Sign-On certificates have a certain lifetime. A certificate should be rotated when it's about to expire. If your IdP uses a certificate for either signature verification or encryption and it expires before you rotate it, **users will not be able to use SSO to sign in until you replace it with a new one**.

Account and Organization Administrators can view and update (when applicable) the Single Sign-On Certificates for their account from the **Single-Sign-On Certificates page**. If the current certificate is due to expire, a warning banner will be displayed at the top of the page outlining when the expiration will occur.

Account Administrators can do this by selecting **Account Settings** > **Security** > **Single Sign-On Certificates**, while Organization Administrators can view Single Sign-On certificates for the Member Portal at the Organization level by selecting **Settings** > **Organization** > **Security** > **Single Sign-On Certificates**.



NOTE: Click Learn More here or from the banner warning for more details on updating your certificate.

Each certificate entry will include the following columns:

- Label
- Type (CA-signed or Self-signed)
- Expiration On
- Created On
- Key Size
- Download

When configured, if a certificate is due to expire, the **Manager** and **Member Portals** section of the page will appear with the **Update Certificate** button for the expiring entry. If not, will appear as “-“ or “Change Certificate” when there are other alternatives for certificates.

You can also see the following data in this section:

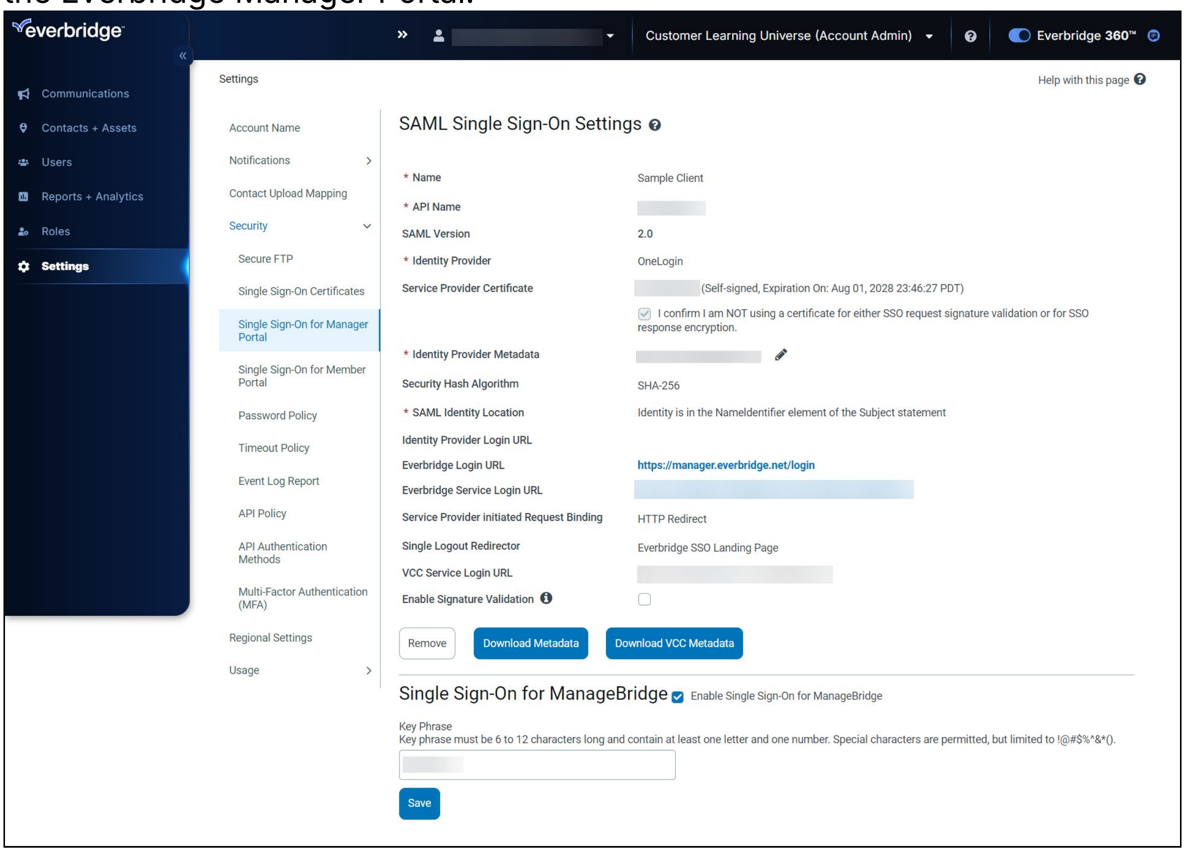
- API Name
- Organization (Only applicable for Member Portal section)
- Certificate in Use
- Applied On
- Applied By

Single Sign-On for Manager and Member Portals

Single Sign-On (SSO) is an authentication scheme that allows users to log in to Everbridge Suite with a single ID and password. You can create Single Sign-On settings for the Manager Portal or the Member Portal using SAML (Security Assertion Markup Language) version 2.0.

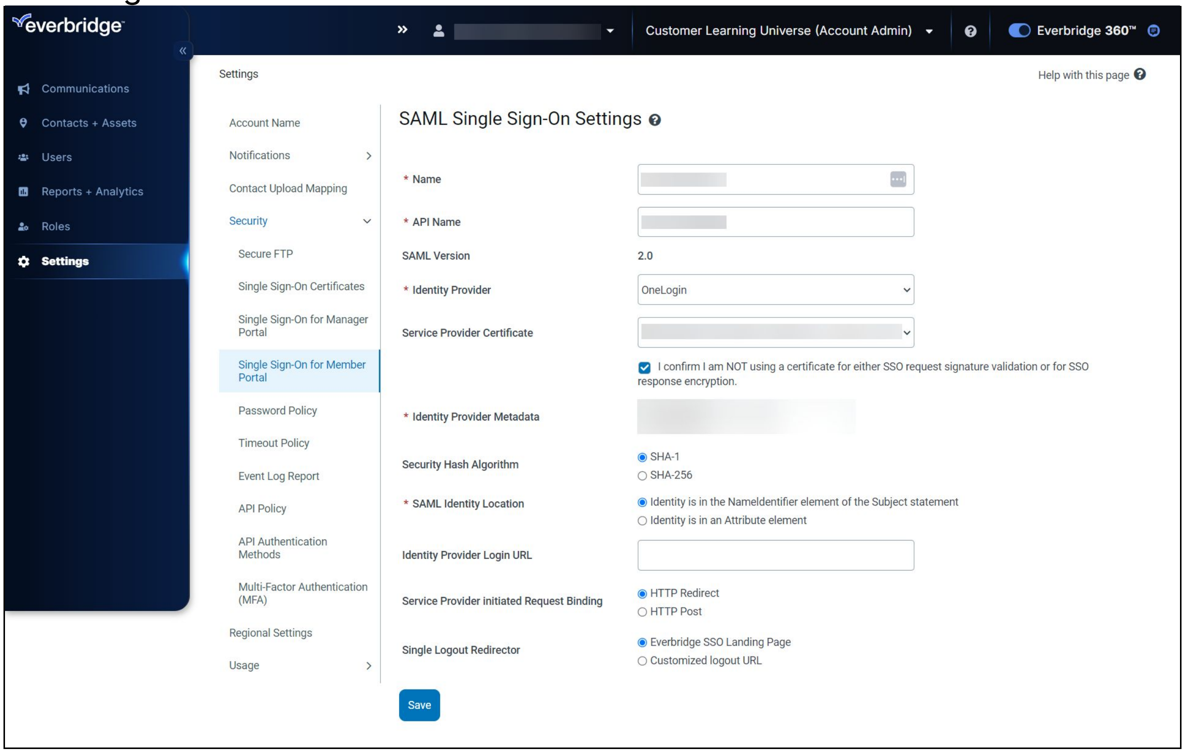
To access and configure your Account's Single Sign-On settings, navigate to **Settings** > **Security** in the Manager Portal and select either of the following:

- **Single Sign-On for Manager Portal** - Configure Single Sign-On settings for the Everbridge Manager Portal.



    - **Single Sign-On for ManageBridge** can also be enabled from this page. Set a key phrase of 6-12 characters long that contains at least one letter and one number.

- **Single Sign-On for Member Portal** - Configure Single Sign-On settings for each Organization's Member Portal.



NOTE: Single Sign-On for Member Portal certificates can also be viewed at the Organization level from **Settings** > **Organization** > **Security** > **Single Sign-On for Member Portal**.

SAML Single Sign-On Settings

The following table displays the fields to configure Single Sign-On for your users. A red asterisk (*) indicates a required field.

Field Name	Description
*Name	A name for SSO settings.
*API Name	The unique name used by the API, we rely on this attribute to generate an Everbridge Login URL.
SAML Version	2.0
*Identity Provider	Name of your Identity Provider.
Service Provider Certificate	Choose the certificate you want to use, and confirm whether IDP will use it for SSO request signature validation or for SSO response encryption.

*Identity Provider Metadata	The XML file that uniquely identifies your SAML identity provider.
Security Hash Algorithm	The Hash Algorithm.
*SAML Identity Location	The location in the assertion where a user should be identified. Select either of the following: • **Identity is in the NameIdentifier element of the Subject statement** • **Identity is in an Attribute element**
Identity Provider Login URL	The URL where Everbridge sends a SAML request to start the login sequence.
Everbridge Login URL (auto-populated field, invisible at creation)	The web address for logging in to the Manager Portal directly using a username and password (otherwise known as a break glass account).
Everbridge Service Login URL (auto-populated field, invisible at creation)	The unique URL that users will access to log in to the Manager Portal using SSO.
Service Provider initiated Request Binding	• **HTTP Redirect** • **HTTP Post**
Single Logout Redirector	Everbridge SSO Landing Page
VCC Service Login URL (auto-populated field, invisible at creation)	The unique URL that users will access to log in to VCC using SSO.
Enable Signature Validation	If checked, will do mandatory signature validation for SAML Assertion and error out if it fails.

SAML Single Sign-On Settings for the Manager Portal

To configure Single Sign-On for the Manager Portal:

1. Fill out the necessary information in the required fields.
2. If you select the **Enable Single Sign-On for ManageBridge** check box, a **Key Phrase** field appears. You must enter a phrase that contains 6-12 characters and at least one letter and one number. Special characters are permitted, but limited to !@#$%^&*().
3. Click **Save**.
4. Click **Download** to download the SSO metadata and import it to the Identity Provider (IDP).
5. Add the users with SSO User IDs into Everbridge Suite.

Single Sign-On Settings for the Member Portal

To configure Single Sign-On for the Member Portal:

1. Fill out the necessary information in the required fields.
2. Fill out the necessary information in the **Manage Single Sign-On for Organizations (Private Only)** fields at the bottom of the interface.
3. Click **Save**.
4. Click **Download** to download the Service Provider Metadata file for the Organization and import it to the Identity Provider (IDP).
5. Add the contacts with SSO User IDs into Everbridge Suite.

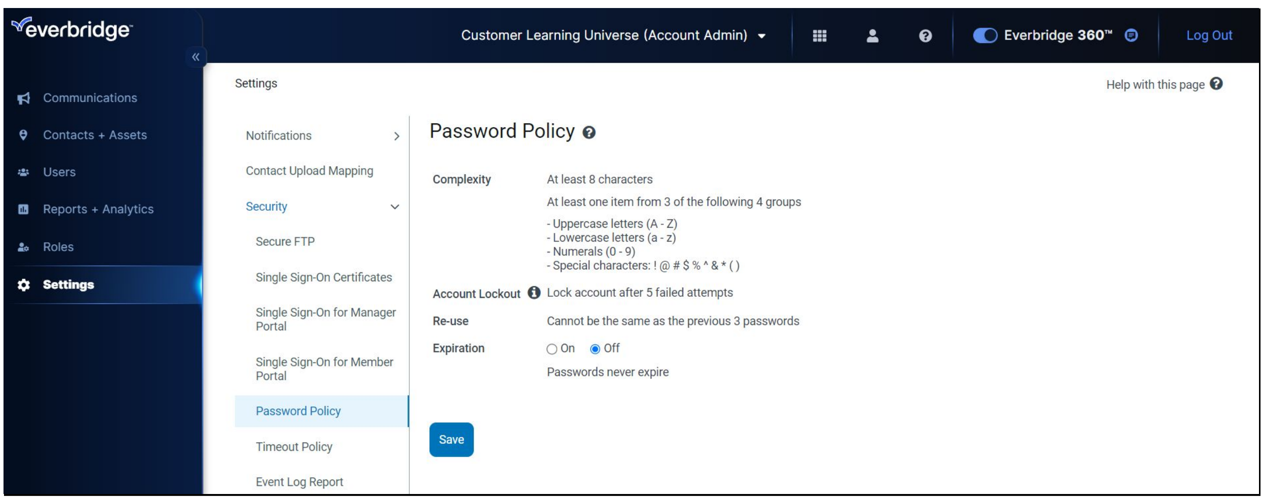
Password Policy

Account Administrators can set whether users' passwords expire, the password expiration time, and if users receive a password expiration reminder.

To enable password expiration, select the **On** radio button in the **Expiration** section. By default, the Password expiration is set to 90 days. Select 90 days, 180 days, or 365 days. If users change their passwords before the expiration time, the count starts over from that date.

When password expiration is enabled, users can receive a daily reminder for seven days to reset their password. After a user resets their password, the email reminders stop. To disable these email reminders, select the **Off** radio button for the password reminders setting.

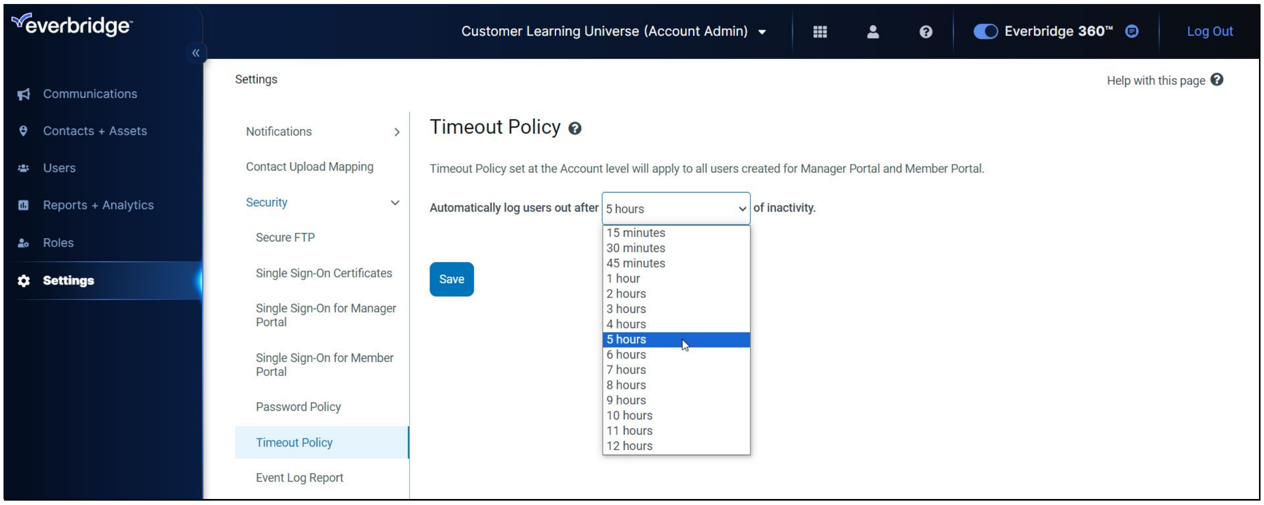
To disable password expiration, select the **Off** radio button.



Timeout Policy

Account Administrators can change the timeout period, which automatically logs out users after a specified time of activity. The default is 12 hours.

Select the desired timeout policy from the menu. The Timeout Policy set at the Account level applies to all users created for the Manager and Member Portal.

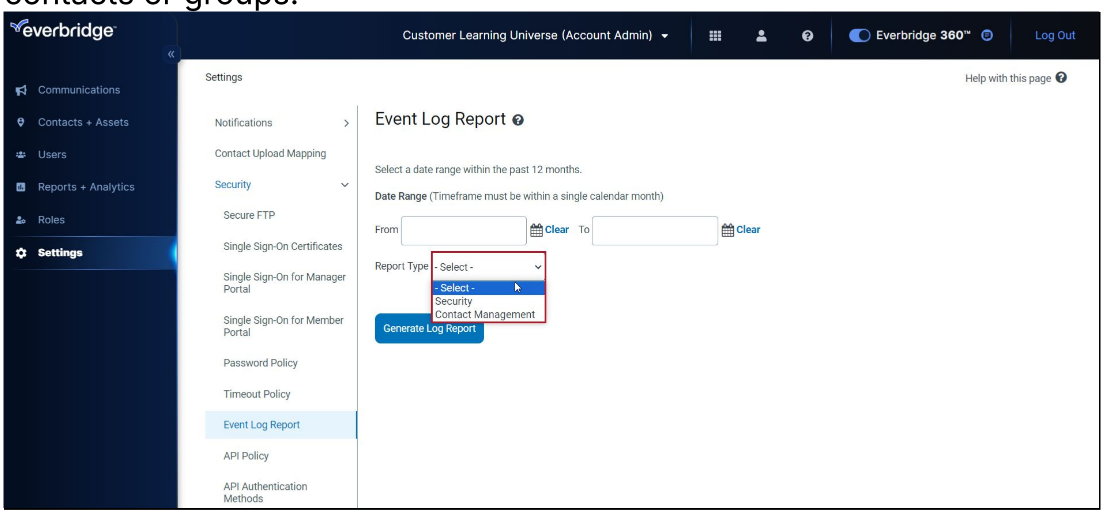


Event Log Report

The **Event Log Report** (found at the Account level under **Settings** > **Security** > **Event Log Report**) offers contact management and security event logging for Account Administrators.

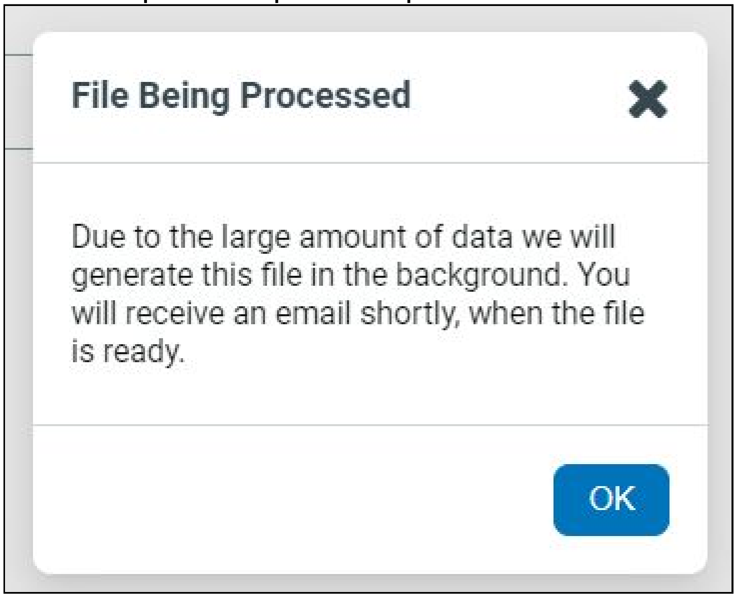
To generate an Event Log Report:

1. Enter a start date in the **From** text box and an end date in the **To** text box. This date range must be within a single calendar month and the last **12 months**.
2. Select one of the following report types from the **Report Type** menu.
   - **Security Event** - Provides an event log of API changes and access events.
   - **Contact Management** - Provides an event log of changes made to contacts or groups.

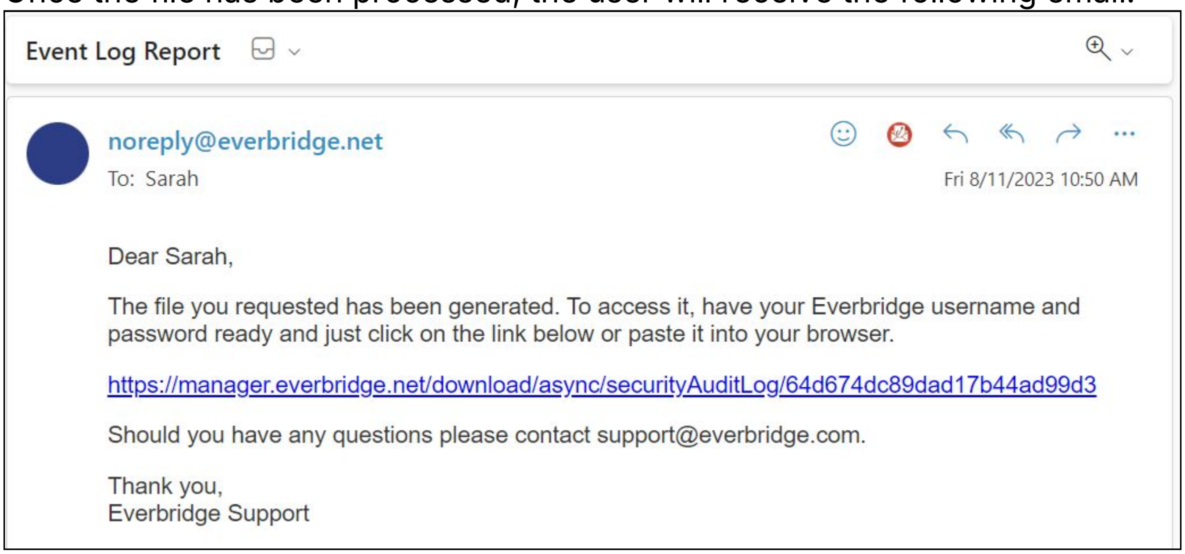


3. Click **Generate Log Report** after choosing the Report Type. A message will appear informing the user that the file is being processed, and will be emailed

to the requester upon completion.



4. Once the file has been processed, the user will receive the following email:



NOTE: This email will contain a link to a .txt file. To read this file in Excel, you'll likely need to rename the file type from .txt to **.csv** or use the Import feature. For more details, see this Knowledge Base Article in the Support Center.

What to Expect When Downloading a Security Event Log Report

Security Event	Manager Portal	Member Portal	API
API Related			

API Policy is turned on or off	✓	X	X
Basic (Username/ Password) is turned on or off	✓	X	X
Access Token(Advanced security) is turned on or off	✓	X	X
API user is granted access	✓	✓	X
API user has access removed	✓	✓	X
Access key is deleted	✓	X	X
Access key is downloaded (Download Access Key button is clicked when generating the API key)	✓	X	X
Access key is downloaded using the Download button.	✓	X	X
Access key is made inactive or active	✓	X	X
API key is generated	✓	X	X
User Management			
Change of User Account Status (Enable/Disable)	✓	X	X
Create, edit, or delete User	✓	✓ (Doesn't edit Logs)	X
Download User CSV file	✓	X	X

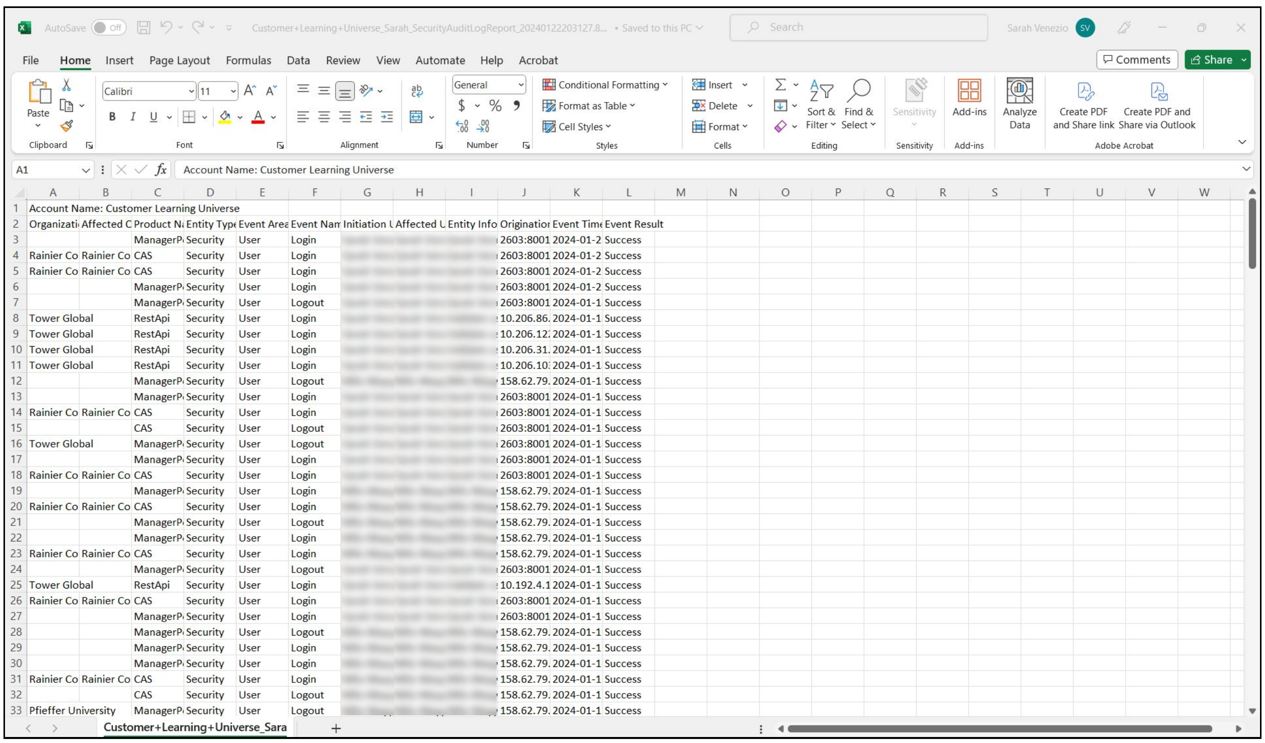
Upload User CSV file			
Send invite email	✓	X	X
User Authentication			
User log on/off (Login/Logout)	✓	✓	✓
User logged off due to session timeout	✓	✓	X
Failed login attempt	✓	✓	✓
User is locked	✓	X	X
Change password (via Forgot Password)	✓	X	X
Change password (via My Account)	✓	X	X
Role Management			
Create, edit, or delete Role	✓	X	X
Account Setting Change			
Change MFA Settings	✓	X	X

When an event from the table above takes place, the type of information that is logged is listed below:

Log Field	Description
Account Name	The Account where the event occurred.
Organization Name	The Organization where the event occurred.
Affected Organization Names	Names of the Organizations affected by the event.
Product Name	Product where the event occurred.
Entity Type	Event Type.
Event Area	Feature area where the event occurred.

Event Name	The name of the event.
Initiation User Identifier	Who initiated the event.
Affected User Name	Who the event impacts.
Entity Info	Description of the event.
Origination IP Address	Internet Protocol (IP) Address from where the event originates.
Event Time	Date/Time of the event.
Event Result	Success or Failure of the event.

Security Event Log reports will typically look similar to the image below:



What to Expect When Downloading a Contact Management Event Log Report

Contact Management Event	Manager Portal	API	SFTP
Contact Modifications			

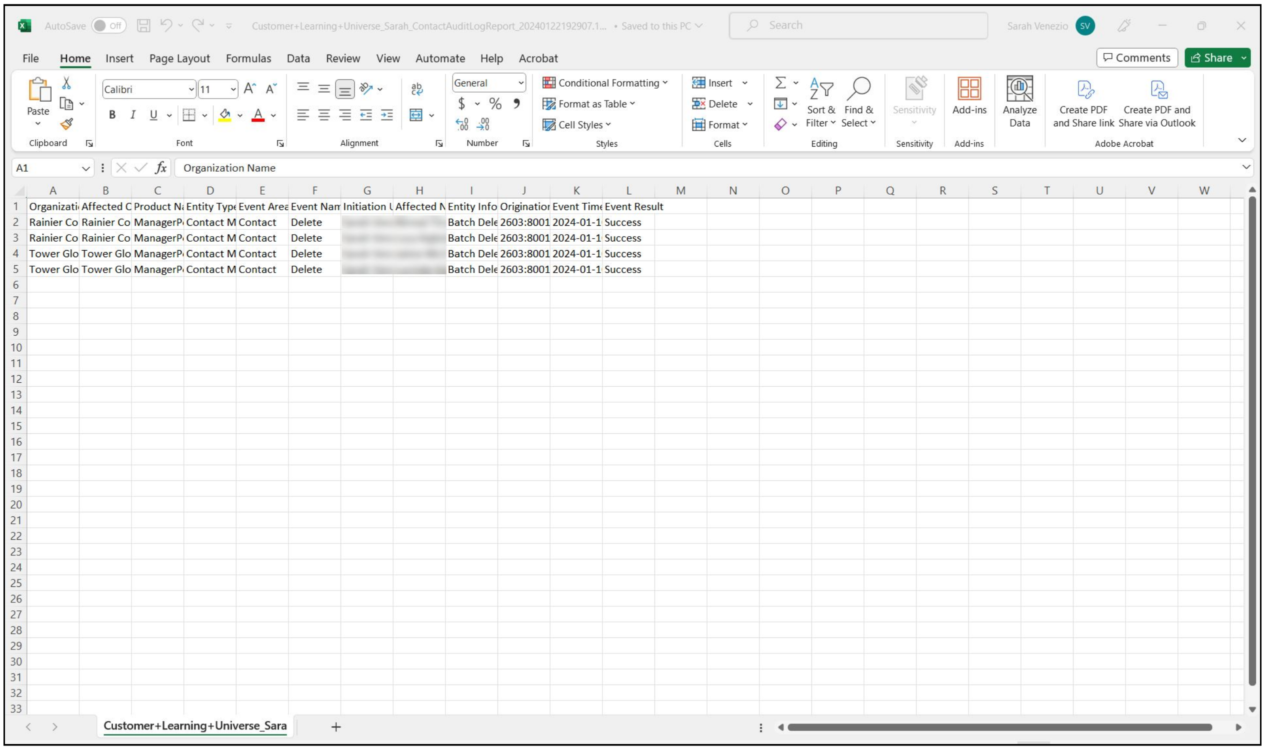
Contact is added, updated, or deleted (Includes deletion through Upload).	✓	✓	X
Rule is added, updated, or deleted.	✓	✓	X
Contact Upload (Update, Replace, Restore, Delete).	✓	✓	✓
Contact Download.	✓	✓	X
Group Modifications			
Group is added or deleted.	✓	✓	X
Group is renamed.	✓	✓	✓
Contact is added to a group, removed from a group, or moved from a group.	✓	✓	X
Group description is changed.	✓	✓	✓
Calendar is unlinked from a group.	✓	✓	✓
Calendar is linked to a group.	✓	✓	✓
Group's hierarchy is changed.	✓	✓	✓

When an event from the table above takes place, the type of information that is logged is listed below:

Log Field	Description
Organizaton Name	The Organization where the event occurred.
Affected Organization Names	Names of the Organizations affected.
Product Name	Product where the event occurred.
Entity Type	Event Type.
Event Area	Feature area where the event occurred.
Event Name	The name of the event.
Initiation User Name	Who initiated the event.
Affected Name	Which contact or group was affected by the event.
Entity Info	Description of the event.

Origination IP Address	Internet Protocol (IP) Address where the event originates.
Event Time	Date/Time of the event.
Event Result	Success or Failure of the event.

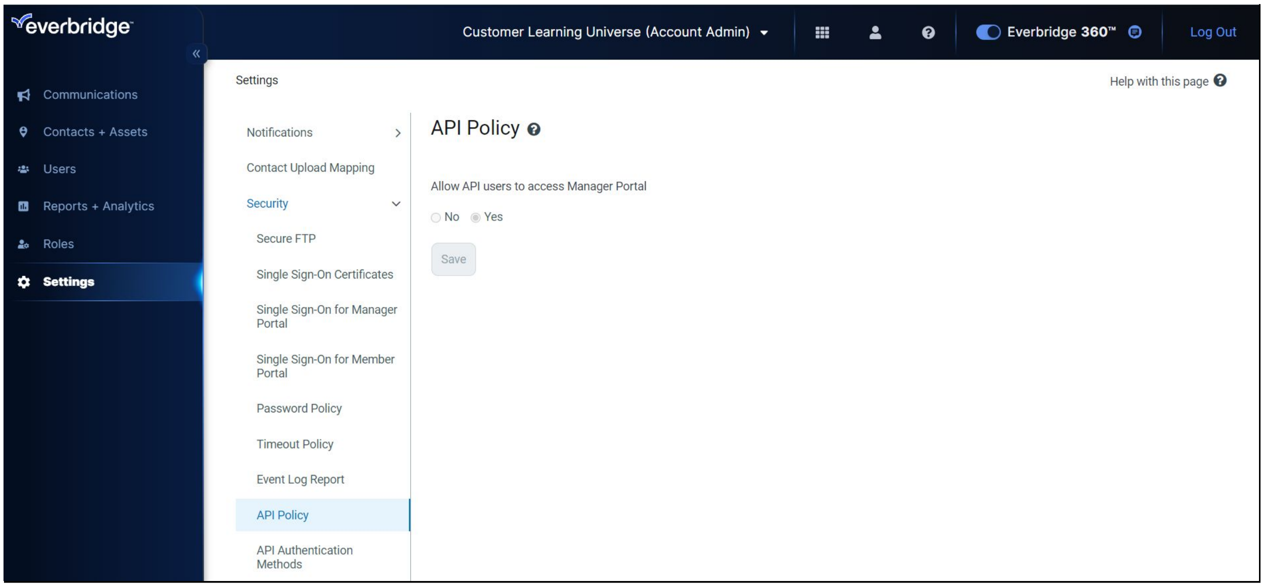
Contact Management Event Log reports will typically look similar to the image below:



NOTE: For more examples, see [Event Log Report for Reporting Security and Contact Management Events in Everbridge Suite](#).

API Policy

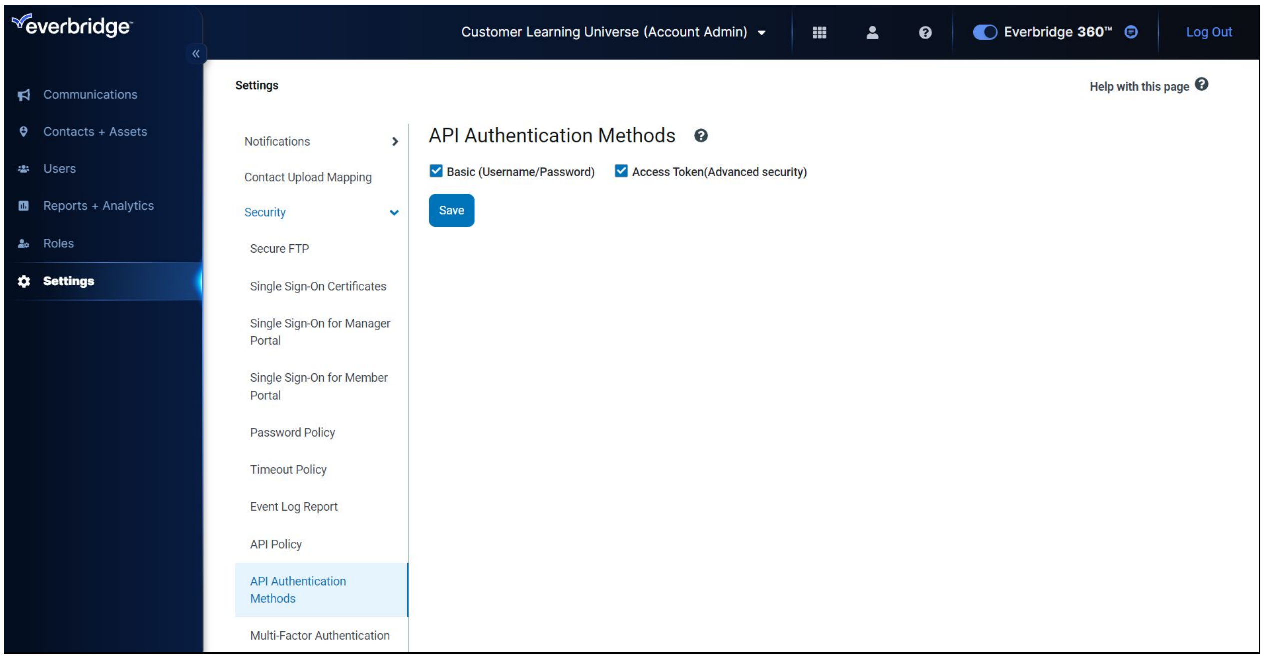
Configure whether API users can access the Manager Portal.



API Authentication Method

This setting is for API Authentication for REST APIs. The following checkboxes are selected by default:

- **Basic** (Username/Password) - Basic Authentication Header.
- **Access Token** (Advanced Security) - When selected, requires an access token.

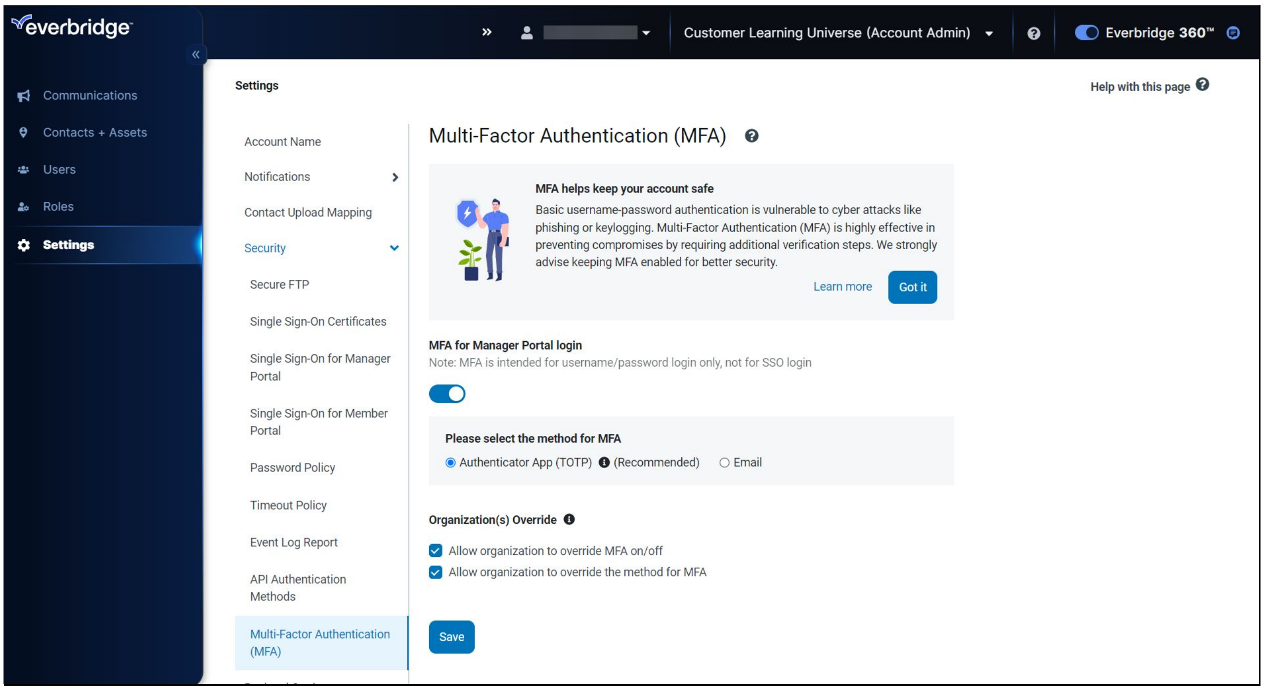


Either is accepted when you pass a value. If the checkboxes are clear, when you pass a value, it fails.

Multi-Factor Authentication

Account-Level Configuration

Multi-factor Authentication (MFA) can be configured at the Account level from **Settings** > **Security** > **Multi-Factor Authentication** for an additional layer of security. Multi-factor authentication is intended only for use with typical login credentials (Username and Password) and not with Single Sign-On. For users logging in via Single Sign-On (SSO), there is no impact on their login experience.



After selecting the toggle, the Administrator will be prompted to use one of two authentication methods:

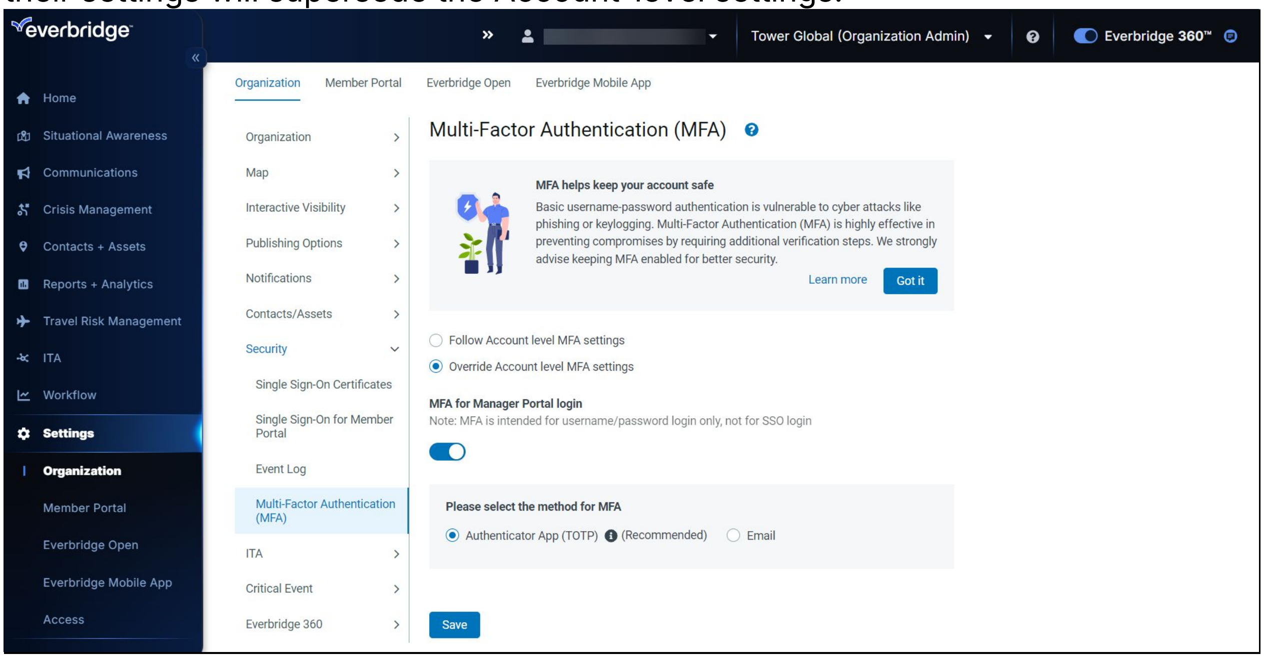
1. **Authenticator App (TOTP)**
2. **Email**

> **NOTE:** The **Authenticator App** option is recommended, as it provides users with a higher level of security.

Once the selection has been made and saved, all users from the Account will be required to use the specified Multi-Factor Authentication method when logging into Everbridge.

Organization Override

Administrators can also configure multi-factor authentication at the Organization level from **Settings** > **Organization** > **Security** > **Multi-Factor Authentication**. The Account Administrator must first define an Organization Override, which authorizes subordinate Organizations to configure their own Organization-level MFA settings based on the approved scope. If Organizations choose to override, their settings will supersede the Account-level settings.



Enabling or Disabling Multi-factor Authentication

Enable **Allow Organization to override MFA on/off** to allow Organizations to enable/disable MFA at the Organization level and choose what method of MFA to use.

Multi-factor Authentication Method

Enable **Allow Organization to override the method for MFA** if you would like to enable Organizations to choose their own authentication method (Authenticator App or email).

> **NOTE:** This option allows Organizations to override the Account authentication method but does not allow them to disable MFA.

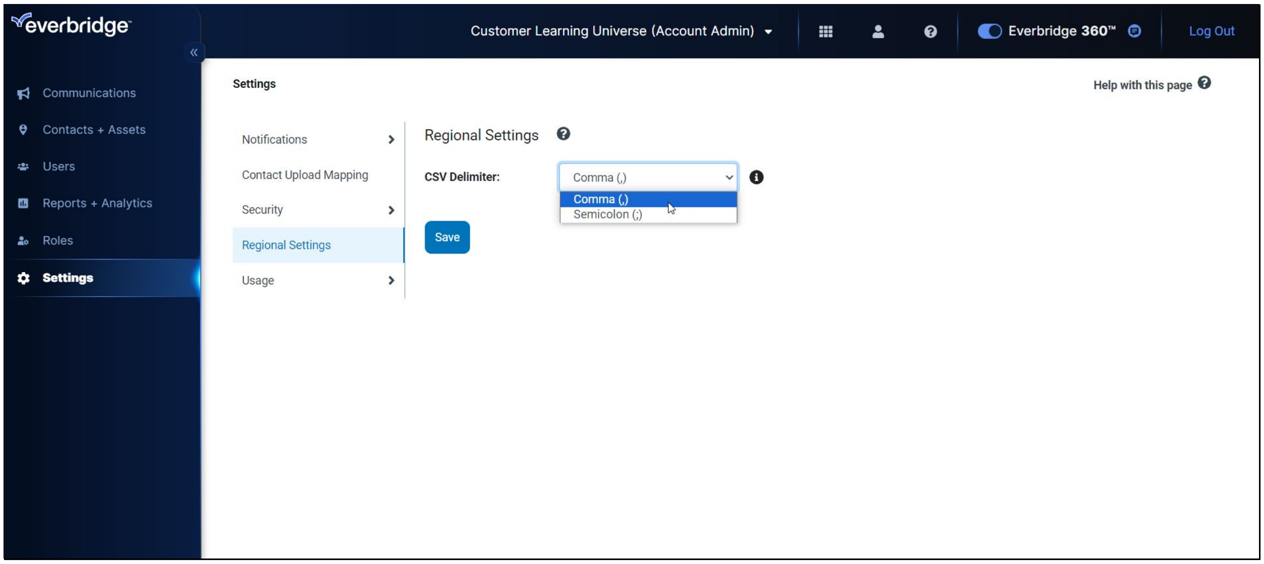
Note that the Authentication App (TOTP) used by Everbridge has been tested against the following mainstream authenticator apps:

- Google Authenticator
- Microsoft Authenticator
- Duo Mobile
- Authy
- OneLogin Protect
- LastPass Authenticator
- Okta Verify
- FreeOTP
- Yubico Authenticator (requires use with a Yubikey)

If you want to use a different authenticator app, please seek advice from your IT department.

Regional Settings

Regional Settings can be configured at the Account level from **Settings** > **Regional Settings**.



Select one of the following from the CSV Delimiter field from the drop-down list, then click **Save**. These settings apply to all Secure FTP uploads:

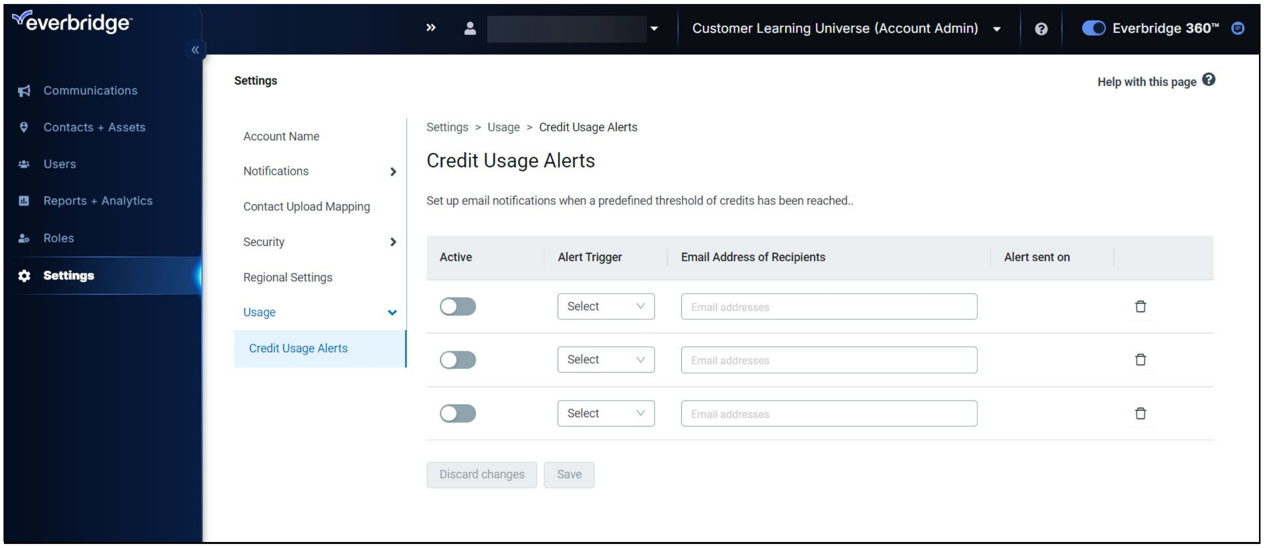
- Comma (,)
- Semicolon (;)

The comma delimiter applies to all uploads and downloads of CSV files in the Manager Portal.

NOTE: A user can set regional settings from their Profile, which takes precedence over the Account or Organization-level settings.

Credit Usage Alerts

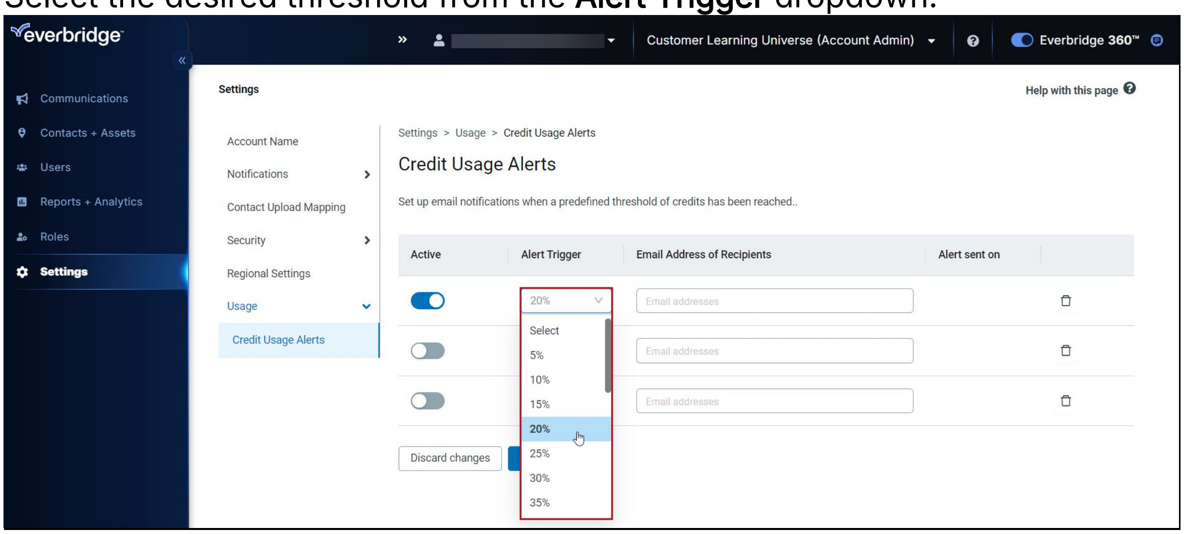
Account Administrators can configure email notifications to be sent automatically once a predefined credit usage threshold has been reached from **Settings** > **Usage** > **Credit Usage Alerts.**



> **NOTE:** Up to three alerts can be enabled at once.

To configure a Credit Usage Alert:

1. Click the **Active** toggle.
2. Select the desired threshold from the **Alert Trigger** dropdown.



3. Enter the recipients' email addresses. Multiple addresses can be added by adding a comma or pressing the **Enter** key after each address.

4. Click **Save**.

NOTE: Alert Triggers can be deleted by clicking the **Trashcan** icon on the right.

Organization Level Settings

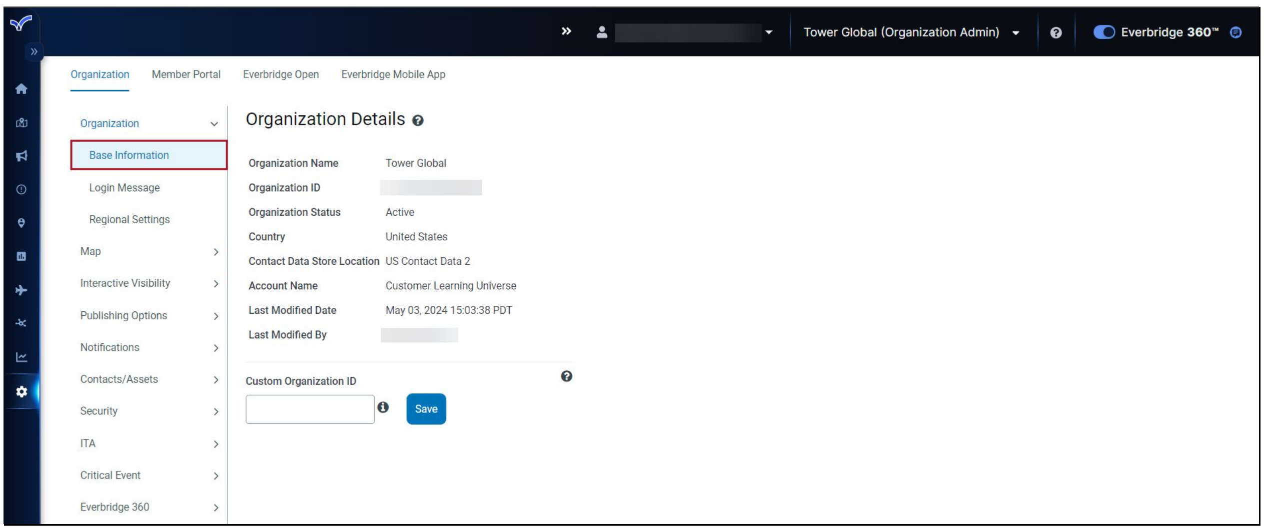
Account and Organization Administrators can configure various settings for an Organization. For example, this includes configuring the delivery methods for contacts to receive Notifications, Notification sender information, map defaults, Notification publishing options, and Org-specific security information, such as Single Sign-On.

Organization

The **Organization** section contains general information about an Organization, such as the Organization's name, ID, login message, and Secure FTP (SFTP) upload settings. Administrators can use this section to view information about an Organization, configure a login message, and set SFTP upload settings.

Base Information

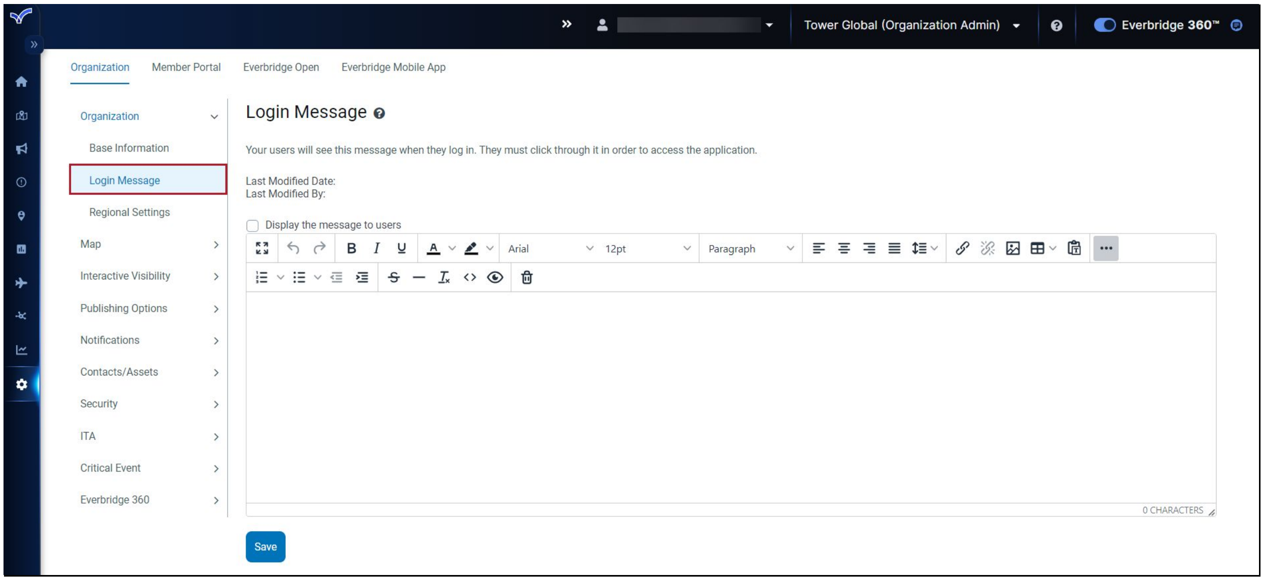
This page provides general information about your Everbridge Organization, such as the Organization Name, Organization ID, and Organization status. The information in this section is useful, for example, when Administrators need to contact Everbridge Technical Support or their Implementation specialist.



You can also add a custom Organization ID. This is needed to access certain premium features, such as launching a Notification by phone. To add a custom Organization ID, enter up to 10 digits in the **Custom Organization ID** field and click **Save**. For more information, see Setting Up to Launch by Phone.

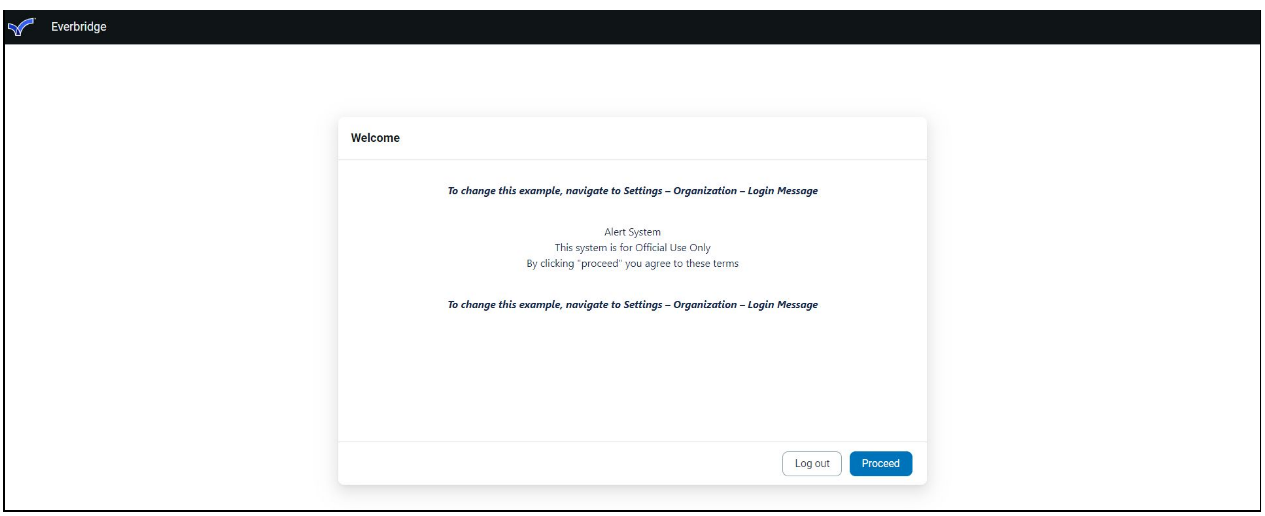
Login Message

This is the message Everbridge Suite users see when they log in to the application. For example, use this message to advise users about the terms and conditions for the Everbridge Organization, or update users about an incident or an issue.



You can enter up to 2,500 characters in the text box and, optionally, apply any desired rich text formatting such as bold text, large fonts, or highlighting.

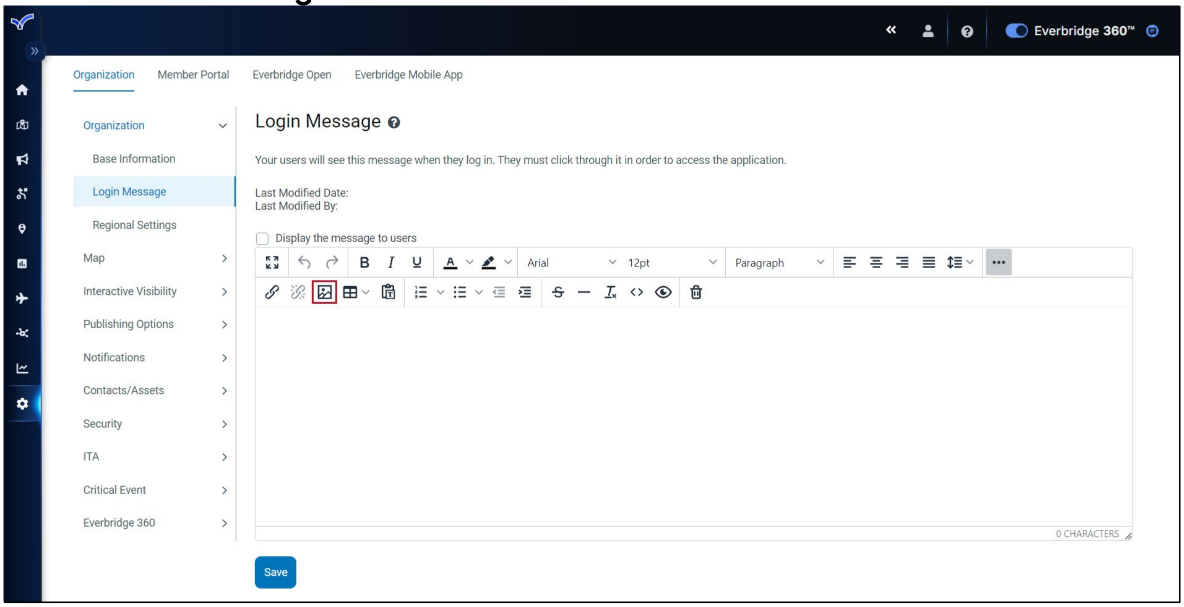
Once satisfied with the message, select the **Display the message to users** checkbox and click **Save.** The message will now be displayed to users when accessing the Organization.



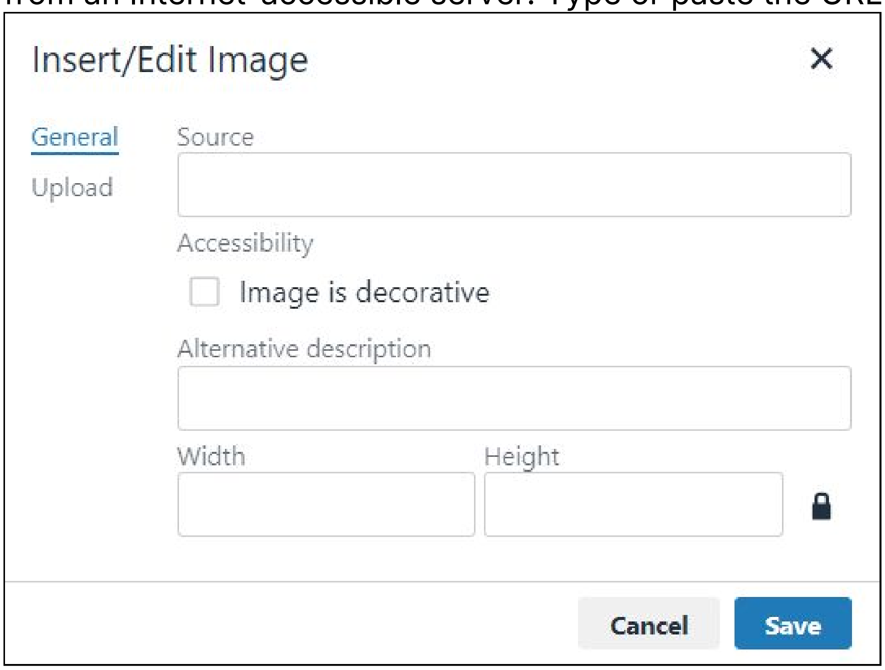
Insert Image

To insert an image:

1. Click the **Insert Image** icon from the Rich Text Editor toolbar.

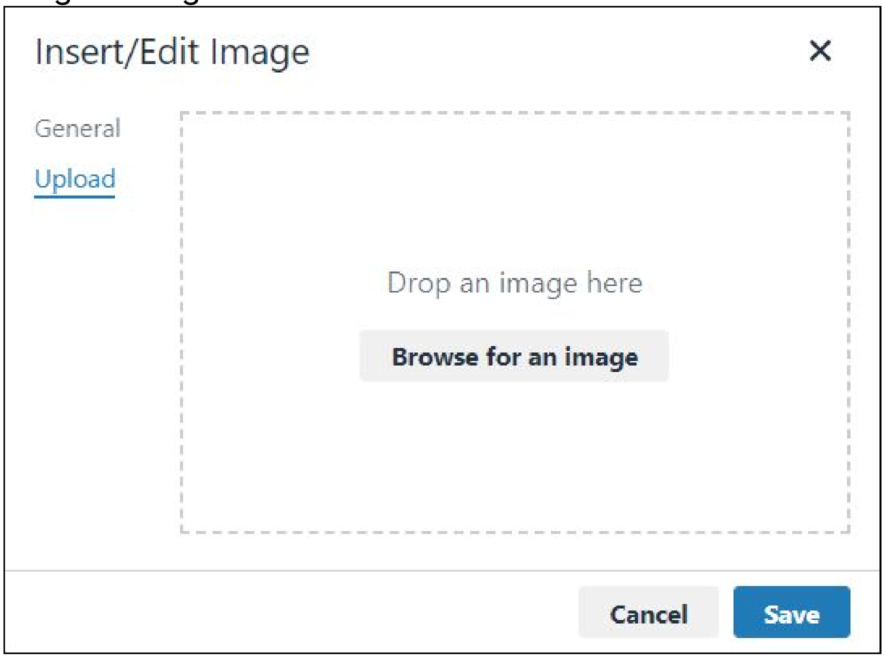


2. Choose an image in one of two ways:
   - From the **General** subtab, enter a URL address to retrieve an image from an Internet-accessible server. Type or paste the URL.



     - If desired, specify if this is a decorative image or give it an alternative description. Width and Height can also be configured.

- From the **Upload** subtab, either click **Browse for an image** or click and drag an image into the selection frame.

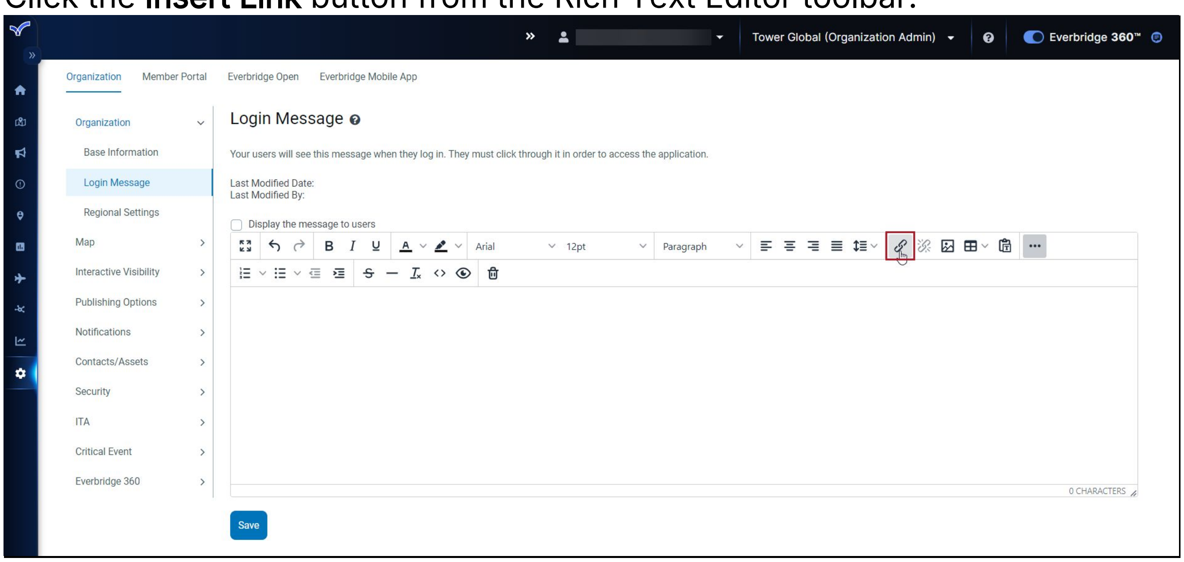


3. Click **Save**.

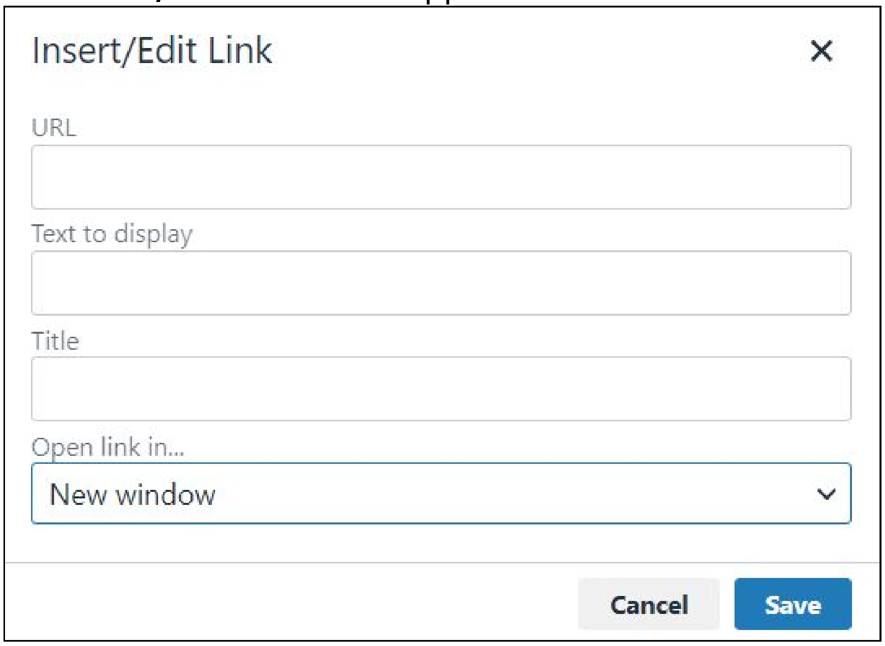
Insert Link

To insert a link:

1. Click the **Insert Link** button from the Rich Text Editor toolbar.



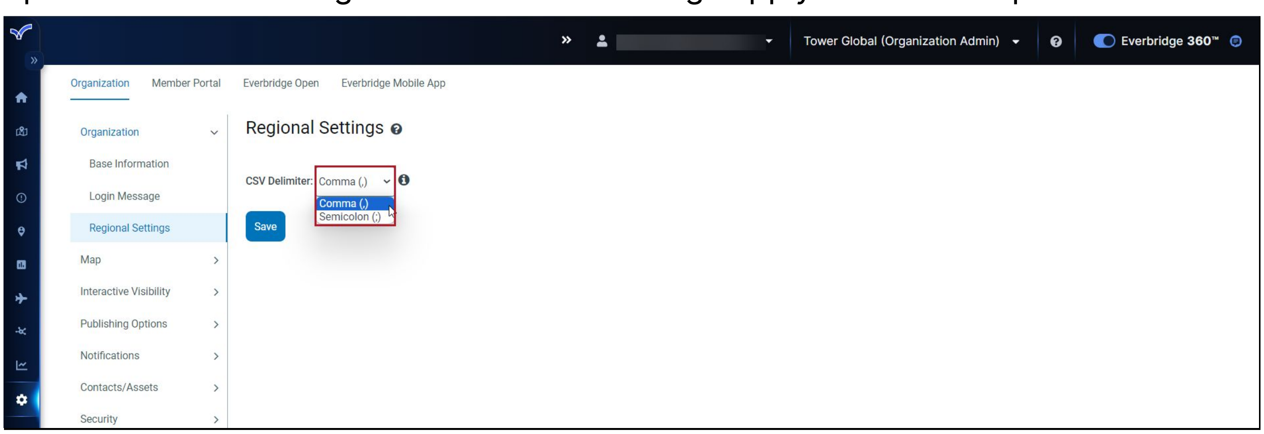
2. The **Insert/Edit Link** modal appears.



Fill in the following fields:
   - URL
   - Text to Display
   - Title
   - Open Link in...
      - Current Window
      - New Window
3. Click **Save**.

Regional Settings

Use **Regional Settings** to configure how the system delimits CSV data files uploaded to the Manager Portal. These settings apply to all SFTP uploads.

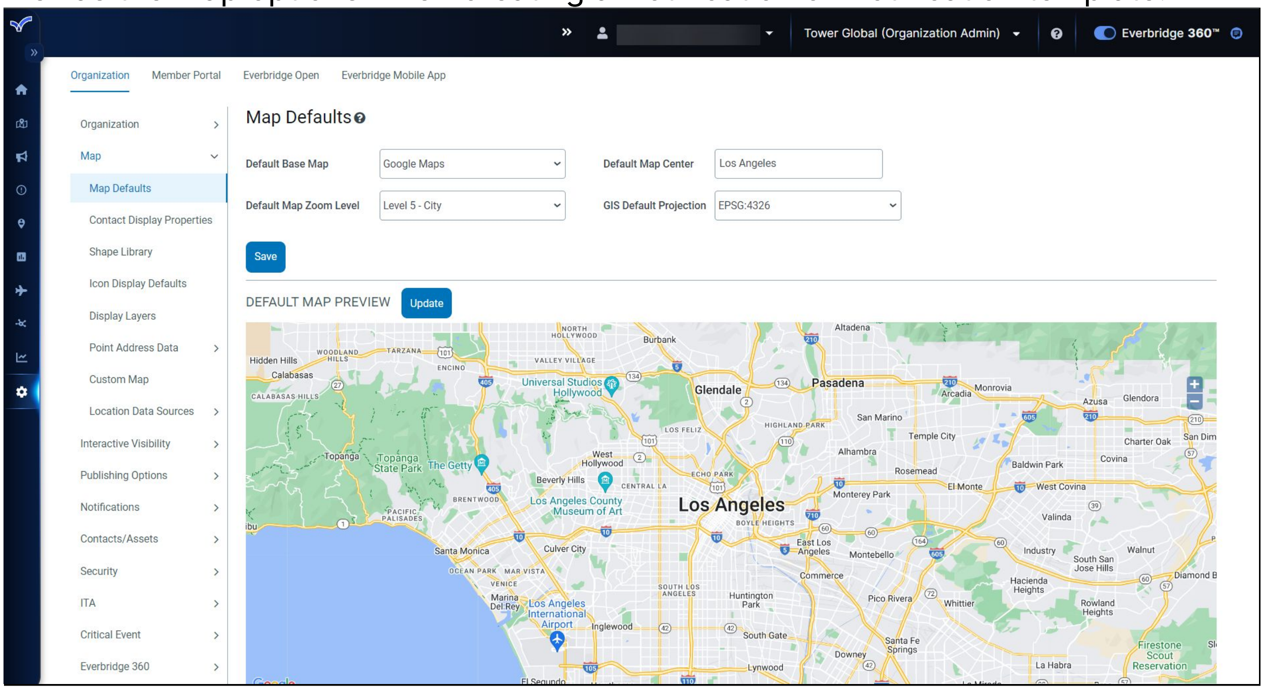


From the CSV Delimiter field, select one of the following from the drop-down list and click **Save**:

- Comma (,)
- Semicolon (;)

Map Settings

The adjustments made in **Settings** > **Map** affect the map in the **Universe** tab, as well as the map options when creating a Notification or Notification template.



Map Defaults

You can configure your map defaults for use in the Map widget in the Manager Portal from **Settings** > **Map** > **Map Defaults**. These defaults include:

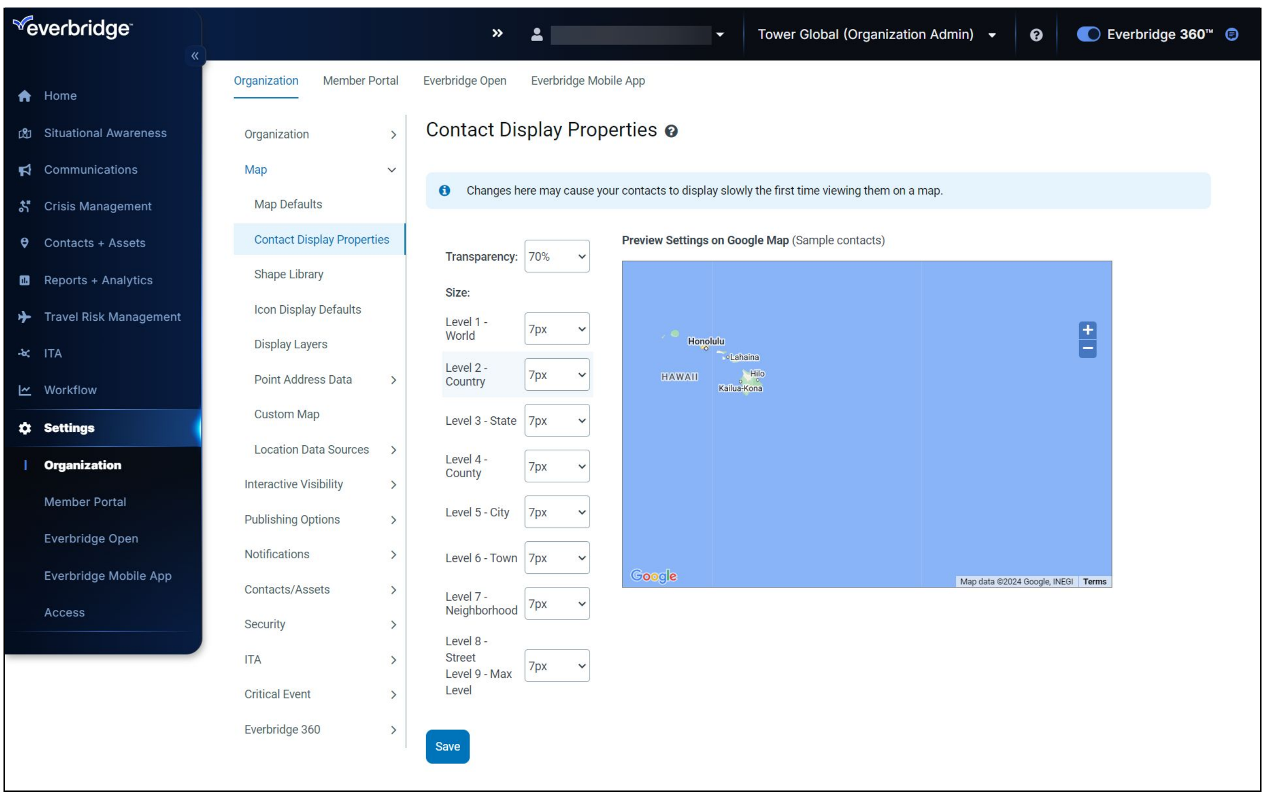
- **Default Base Map** - The default base map your users see when they open the map widget in the Manager Portal. Locations and selection shapes are displayed on this map. Users can change the base map for their personal view within the map widget, but their selection won't alter the Organization's default map setting. Options include:
  - Google Maps
  - Bing Maps
  - ESRI Streets
- **Default Map Zoom Level** - The starting resolution level when your users open the map widget. Your users can zoom in or zoom out when they open the Map.
  - Level 1 - World
  - Level 2 - Country
  - Level 3 - State
  - Level 4 - County
  - Level 5 - City

    - Level 6 - Town
    - Level 7 - Neighborhood
    - Level 8 - Street
    - Level 9 - Max Level
- **Default Map Center** - The default location on which the application focuses the map when your users open the map widget. Your users can change the focus of the map in the map widget for their Notification purposes.
- **GIS Default Projection** - Used when processing the locations in your contact CSV file if the location contains Latitude and Longitude values.

Click **Save** after making any changes to the Map settings.

Contact Display Properties

You can set the transparency and size of your contact location icons on the map. This is useful, for example, when focusing on an area with a large group of contacts.



Select values that enable users to distinguish the icons for the various record types and to identify information on the map.

Shape Library

Upload predefined polygons your users can use to select contacts from the map for a Notification. This step could eliminate the need for users to draw commonly used polygons before preparing the Notification.

Requirements

- Shapes must be single, closed-loop polygons.
- The file can contain multiple polygons, which you will be able to load or hide separately on the map.
- Shapes must be in WGS1984 projection (EPSG:4326 and EPSG:3857 data formatting) and must contain fewer than 5,000 vertices.
- Do not load polygons with holes, for example, donut shapes.
- Shapes must be submitted in compressed file format (.ZIP). KML files cannot be compressed.
- Do not load multiple shape files via REST API.

Importing Regions Into the Shape Library

You can upload files using one of the following formats:

- A Keyhole Markup Language (KML) file, which must not be compressed. The maximum file size is 100 MB.
- A compressed Shape (SHP) file. Do not include nested folders in the compressed file (zip file). In other words, the zip file can only contain the shapes. The maximum file size is 100 MB.

To import a region:

1. Navigate to **Settings** > **Map** > **Shape Library**.
2. Click **Import region file**.
3. In the **Region Name** field, enter the shape name as it will appear to users.
4. Select a folder for the file, if available.
5. Click **Upload to portal**.

> **NOTE:** You can add folders before uploading shapes, or you can later move loaded shapes between folders or into a folder.

Managing Folders and Shapes in the Shape Library

Use the following procedures to manage folders and shapes in the Shape Library.

Add a Folder

To add a folder:

1. Navigate to **Settings** > **Map** > **Shape Library**.
2. Click **New Folder,** located at the top of the pane. The application displays a folder at the bottom of the folder list with the default name new folder.
3. Enter the desired folder name (maximum 80 characters, including spaces).
4. Either press ENTER or click in a different area of the page to save the change.

Rename a Folder

To rename a folder:

1. Navigate to **Settings** > **Map** > **Shape Library**.
2. Select the desired folder name to display the edit icons.
3. Select the Pencil to enable the folder name field.
4. Click in the **Name** field and edit the folder name.
5. Either press **ENTER** or click the mouse in a different area of the page to save the change.

Delete a Folder

To delete a folder:

1. Navigate to **Settings** > **Map** > **Shape Library**.
2. Select the desired folder name to display the edit icons.
3. Select the Trash Bin. The application prompts you to confirm.
4. Click **OK** to delete the folder.

> **NOTE:** If you delete a folder that contains shapes, then the application also deletes the shapes. Move the shapes to another folder if you want to keep the shapes.

Move Shapes Between Folders

To move shapes between folders:

1. Navigate to **Settings > Map > Shape Library**.
2. Expand the folder containing the desired shape.
3. Select the desired shape.
4. Drag the shape to the desired folder.

Export a File

To export a Shapefile or KML file:

1. Navigate to **Settings** > **Map** > **Shape Library**.
2. Locate and select the desired shapes.
3. Click **Export Selected**. The selected files are downloaded.
4. Follow your browser’s instructions for storing the shape on your local resource.

Icon Display Defaults

You can configure which Record Types and Building Layers should display by default for your users who navigate to the Universe Map pages of Everbridge Suite. This helps your users by reducing the number of objects they see on a map at a glance.

By default, all checkboxes are enabled. Clear the check boxes you want disabled and click **Save**.

Display Layers

You can upload any shape to overlay on the map as a reference. For example, your Display Layer could be county or city boundaries, school district buildings, or school buildings. Shapes loaded into the Display Layers library cannot be used to select contacts from the map for a Notification. This feature does not support multi-part polygons. Your file can contain multiple shapes to load or hide separately on the map.

Point Address Data: Published

This premium feature is designed to enable you to achieve the level of precision you need for your notifications. An Administrator can load a master list of reference addresses and geopoints and can manage the master list online.

In order to use this feature, load a list of addresses and a latitude/longitude pair of each address. The Everbridge application can use this custom data to geocode an address added to a contact record via the REST API, the Manager Portal, or the Member Portal.

Geocoding

The Everbridge application will use the Point Address data to geocode your contact addresses in the CSV file and the Member Portal.

When geocoding contact addresses in the contact CSV file, the Everbridge geocoding application will assign the Latitude/Longitude to the address in the contact record only if there is a PERFECT match for the fields indicated below. The match is based on the content and not the letter case of the content. For example, "Glendale" and "GLENDALE" are the same value and is a perfect match.

Example 1. Successful Geocoding

Contact Address Field		Point Address Data Field
Street Address	MUST MATCH	Street Address X
City	MUST MATCH	City X
State	MUST MATCH	State X
Postal Code	MUST MATCH	Postal Code X

Example 2. Successful Geocoding

Contact Address Field	Sample Value	Sample Value	Point Address Data Field
Street Address	500 North Brand Blvd	500 NORTH BRAND BLVD	Street Address X
City	Glendale	Glendale	City X
State	CA	CA	State X
Postal Code	91203	91203	Postal Code X

Example 3. Failed Geocoding

Contact Address Field	Sample Value	Sample Value	Point Address Data Field
Street Address	500 N. Brand Blvd	500 North Brand Blvd	Street Address X
City	Glendale	Glendale	City X
State	CA	CA	State X
Postal Code	91203	91203	Postal Code X

Example 4. Failed Geocoding

Contact Address Field	Sample Value	Sample Value	Point Address Data Field
Street Address	500 N. Brand Blvd	500 North Brand Blvd	Street Address X
City	Glendale	Glendale	City X
State	CA	CA	State X
Postal Code	(empty)	91203	Postal Code X

Point Address Data: Published

After uploading the master list of geocoded address records via the **Point Address Data** > **Uploads** page, you must publish the list in order for the Everbridge application to use these addresses.

You can upload a file containing your master list of addresses, or you can manually add the addresses to your master list.

The following tasks can be performed on this page:

- View your current master list of addresses
- Add an address record
- Edit an address record
- Delete an address or selection of addresses
- View the address location on the map using the geopoint in the address record
- Search for an address record or group of address records
- Set the geocoding service: Everbridge Service; My Point Address Info; and My Point Address Info and Everbridge Service. The latter option uses My

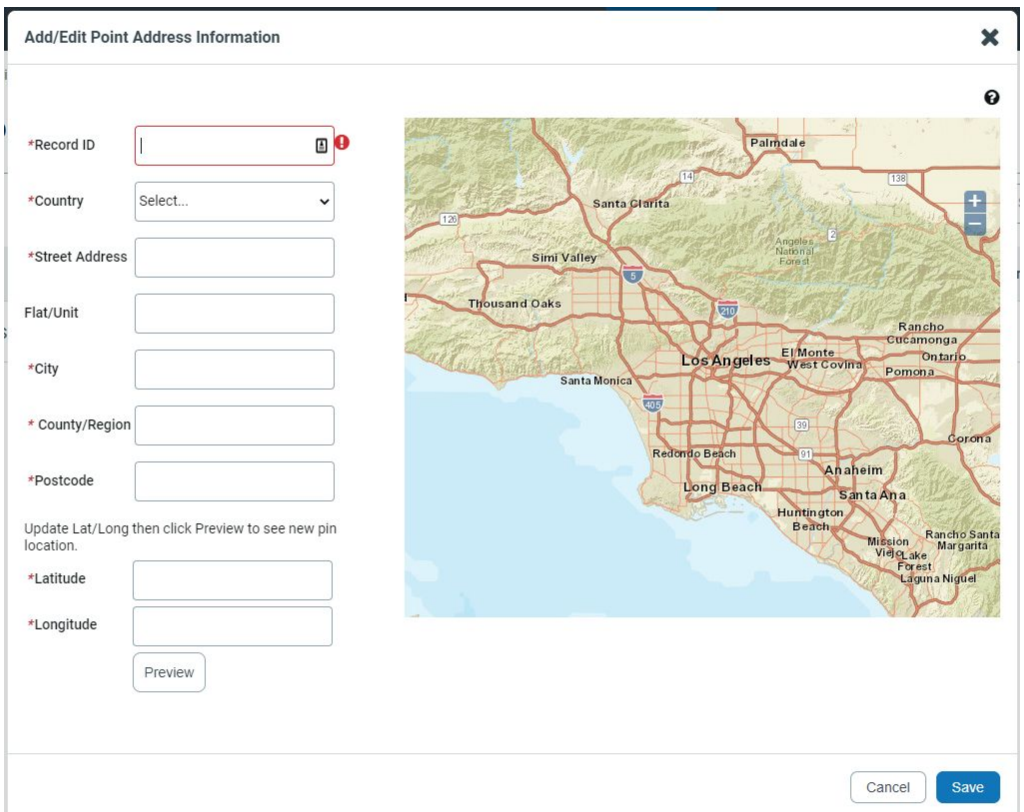
Point Address Info, but if an address in the contact upload cannot be geocoded, the application uses the Everbridge Service.

Adding an Address Record

You can add an unlimited number of addresses to your Organization's master list of addresses. However, Everbridge recommends you also insert the address record to your system of record to ensure your next upload does not overwrite your changes.

To add an address record:

1. Click **Add Address**.



2. Populate the required fields.
3. Preview the location on the map.
4. Select **Save** to close the overlay and save the address to the master list.

Editing an Address Record

You can edit any address record in your Organization's master list of addresses. However, Everbridge recommends you also make the same changes to the address record in your system of record to ensure your next upload does not overwrite your changes.

To edit an address record:

1. Click the **Pencil** icon for the desired address.
2. Modify the address record.
3. Preview the location on the map, if necessary.

   > **NOTE:** The Preview button refreshes the location of an address only if you have changed the Latitude and/or Longitude fields.

4. Select **Save** to close the overlay and save the changes to the address record.

Deleting Address Record

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

To delete one or more address records:

1. Select the checkbox for the address record(s).
2. Click **Delete**.
3. Confirm the request to delete the record(s).

Viewing Address Location on the Map

To view an address location on the map:

1. Select **View on Map** link for the desired address.
2. Review the address details and the address location on the map.
3. Close the overlay.

Using Quick Search

To search for an address using the quick search field:

1. Enter the desired search string in the **Search** field.
2. Select the **Search** icon. The application will search the Street Address, City, and Postal Code fields for address records that contain the search string in any of those fields.

Using Advanced Search

To search for addresses using the Advanced Search:

1. Select the **Advanced Search** link.
2. Select the desired fields to search and the search criteria for each field.
3. Click **Search**.

Setting the Geocoding Service

If you load non-geocoded addresses into contact records or collect contact information via the Member Portal, the Everbridge application can use one of two services for geocoding addresses:

- Set to **Everbridge Service** if you want Everbridge to use its commercial geocoding API service.
- Set to **My Point Address Info** if you want Everbridge to use your Published data for geocoding addresses; this application uses an exact match rule for geocoding addresses. In other words, every component (Street Address, City, State, and Postal Code) of the address submitted via the API, Manager Portal, and Member Portal will be compared to the corresponding address component in your Point Address data. The submitted address will be geocoded (the application assigns the Latitude and Longitude to the address) if every component is an exact match. You can optionally select to use the Everbridge Service if an address in the contact upload cannot be geocoded using Point Address data.

Point Address Data: Uploads

You can upload your master list of Point Addresses by means of a CSV file. You can download the template from this page that contains the required column headers for your file.

Uploading Data Elements

The following table provides details about the column headings, from left to right, in the PointAddressData-Template.csv file.

IMPORTANT: The column headings must not be changed. If you use your own spreadsheet, 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 that the address records you submit are actual address locations. Since you define the Latitude and Longitude for an address, you can determine the precision of the geopoint and the actual location of the geopoint.

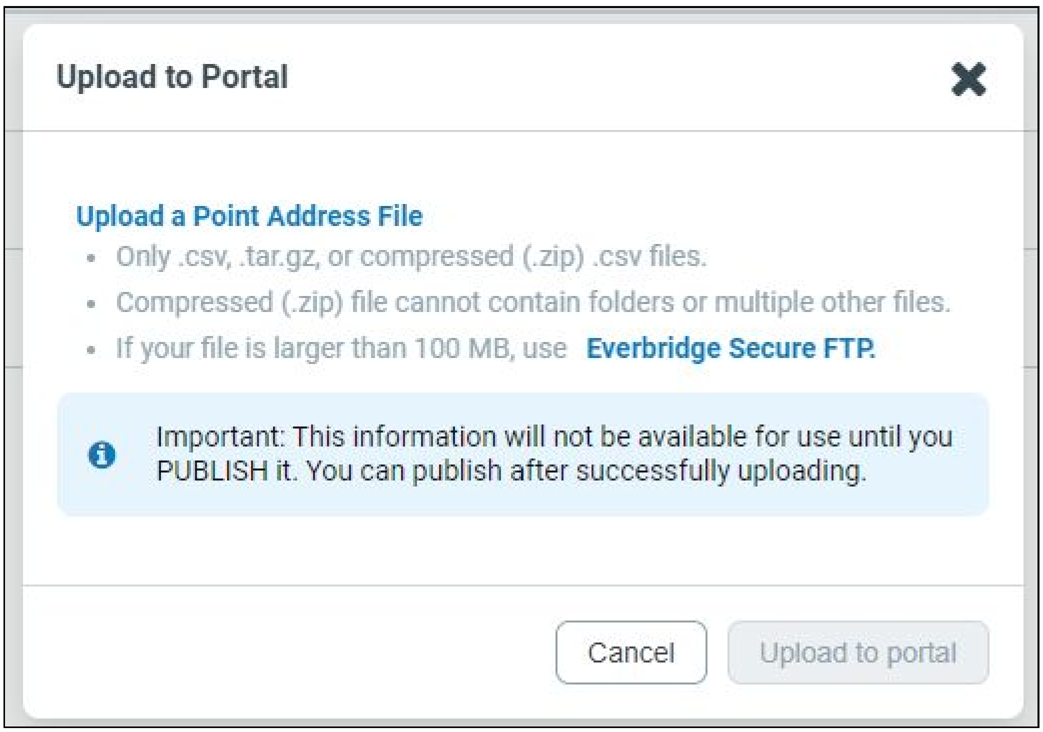
Field	Required	Comments
Address Record ID	Y	Client-defined unique identifier for the address record. Maximum Length: 50 Data Type: String Cell cannot be empty Value must be unique in file NOTE: If two records have the same Address Record ID, then the first record in the CSV file is loaded to the database. The second record is not loaded to the database and is listed in the Errors tab.
Street Address	Y	Includes building number, predirectional, street name, street type, and post-directional. Maximum Length: 100 Data Type: String Cell cannot be empty

Apt/Suite/Unit	N	Apartment, Suite, Unit, Floor, and so on Maximum Length: 75 Data Type: String
City	Y	City name Maximum Length: 40 Data Type: String For US addresses, jurisdiction name below county level Cell cannot be empty
State/Province	Y	Administrative level below county level Maximum Length: 40 Data Type: String For US addresses, Everbridge recommends full State name, e.g., "California" Cell cannot be empty
Postal Code	Y	For US Addresses, ZIP Code or ZIP Code + 4 Maximum Length: 10 Data Type: String Cell cannot be empty Length 99999 or 99999-9999 or 999999999 if Country is "United States"
Country	Y	Full ISO country name Maximum Length: 40 Data Type: String Cell cannot be empty Country name is in the ISO country list
Longitude	Y	Longitude value, including negative sign Data Type: Precision Not validated for client jurisdiction Cell cannot be empty Minimum Value: -180.0000000000 Maximum Value: 180.0000000000 Recommend Spherical Mercator projection

Latitude	Y	Latitude value Data Type: Precision Not validated for client jurisdiction Cell cannot be empty Minimum Value: -90.0000000000 Maximum Value: 90.0000000000 Recommend Spherical Mercator projection

Uploading a CSV File

Select the **Upload to Portal** button. The application displays the following:



Click **Upload a Point Address File**. Then, select the desired CSV file and click the **Upload to Portal** button at the bottom of the overlay.

Your upload is displayed on the **Point Address Data: Uploads** page. The application displays the following information for each upload:

- File Name (as submitted by the user)
- Batch ID (system-generated)
- Upload Status (In-Progress, Completed, or Failed)
- Status (Published or Unpublished)
- Uploaded on (date/time)
- Received (number of rows)

- Loaded (number of rows)

Click **Refresh** to update the status.

> **NOTE:** This information will not be available for use until you PUBLISH it. You can publish after successfully uploading.

Viewing the Point Address Data: Upload Details

To view the Point Address Data: Uploads Details:

1. From the **Point Address Data: Uploads** page, click the **Details** icon.
2. The application lists the upload results in one of two sub-tabs on the page:
    - The **Valid(#)** tab displays a list of the records that passed all data validation tests.
    - The **Errors(#)** tab lists records that failed one or more validation tests. You can correct the data values that caused the errors before publishing the upload, or you can correct the data errors in your upload file and upload the corrected file.

Using Addresses in the Master list to Geocode Contact Addresses

To use the valid addresses in your master list for geocoding contact addresses:

1. Click **Publish**. The confirmation dialog is displayed.
2. Click **Yes**. Only valid addresses will be published. The **Published** button for the upload is replaced by a **Re-Publish** button.
3. Return to the Point Address Data: Uploads page by clicking **Uploads** from the navigation pane. Note the Status is “Published”. Once published, you can Re-Publish as needed.

Managing Buildings

You can create a list of locations important to your Organization in the Map feature. 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.

> **IMPORTANT:** This functionality requires that you have Safety Connection or Visual Command Center as a part of your Everbridge Suite package. If you do not have either of these, contact your Implementation Specialist.

Buildings

You can perform the following tasks on the **Buildings** page:

- View your current master list of buildings.
- Add a building.
- View the address location on the map using the geopoint in the record.
- Search for a record or group of records.
- Delete a building or selection of buildings.

Add a building

To add a building:

1. Click **Add**. The **Add/Edit Building** dialog appears.
2. Fill in the fields.
3. Click **Save**.

Your new building is saved to your list of buildings.

View address location

To view an address location on the map:

1. Locate the desired asset, then click **View on map**. The **Map View** displays the location.
2. Click **Close**.

Search for a record

To search for a record:

1. Type the desired term in the **Search** field. You can search by any of the following:
   - **Location Name**
   - **Location ID**
2. Select the Search icon.

The application will search the **Location Name** or **Location ID** fields for records that contain the search term in any of those fields.

Delete a building

You can delete buildings from your master list. Everbridge also recommends that you remove the building from your system so that your next upload doesn't overwrite your changes.

To delete a building:

1. Select the building's check box.
2. Click **Delete**.
3. Click **Yes** to confirm.

Uploads

To add your assets, you must upload them in a CSV file from the Everbridge-defined template called **asset-template.csv**. This file can contain any number of address records.

Create a CSV File of Assets

To create a CSV file for uploading your assets, first download the template file from **Settings** > **Map** > **Manage Buildings > Uploads.** This template contains the required column headers for your file.

> **IMPORTANT:** If you use your own spreadsheet, make certain your column headings use the exact case-sensitive spelling and spaces. The column headings must not change.

After you download the template, add your assets' information to the corresponding columns in the file. The table below provides details about the column headings in the **asset-template.csv** file.

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 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 and Longitude are provided.	• 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 county level • Maximum Length: 40 • Data Type: String • For US addresses, use the full state name.
Postal/ Zipcode	No, if Latitude and Longitude are provided.	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.
Country	No, if Latitude and Longitude	• Full ISO country name • Maximum Length: 40 • Data Type: String

	are provided.	• 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.	Latitude value: • Data Type: Precision • Not validated for client jurisdiction • Minimum Value: -90.0000000000 • Maximum Value: 90.0000000000 • Recommend Spherical Mercator projection
Longitude	No, if Address fields are provided.	Longitude value, including negative sign: • Data Type: Precision • Not validated for client jurisdiction • Minimum Value: -180.0000000000 • Maximum Value: 180.0000000000 • Recommend Spherical Mercator projection
Location Icon	No	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 correspond, from top to bottom, with the icons to the left. 1. Office 2. Airport 3. Hospital 4. Police or Sheriff Station 5. Fire Station 6. Power Plant 7. Your location of Interest 8. Bank 9. Data Center 10. Manufacturing Plant 11. Prison/Jail 12. Retail Store/Restaurant 13. Meeting Room

Upload a file

After you prepare your CSV file, upload it. To upload the file:

1. Click **Upload to Portal**. The **Uploads** dialog appears.
2. Click the **Upload Buildings** link. The **Open** dialog appears.
3. Select the desired CSV file and click **OK**.
4. Select **Uploads**.
5. Click **Upload to Portal**.
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.

After you upload your ssets, you can see them as icons on the **Universe** map.

Location Data Sources

Expected locations created from travel itineraries are set by default to start or expire 24 hours before the traveler reaches a specific location.

For instance, if a traveler is leaving their home to take a flight, they will be considered at the airport 24 hours before the scheduled departure time for the flight. Similarly, a traveler reaching a destination will be considered at that location for 24 hours after the expected arrival date and time.

- For flight and train segments, two expected locations are created. See the special case for Transit under Expected Location Calculation for Transit below.
- For a car segment, two expected locations are created.
- For a hotel segment, a single expected location is created.

The default times are configurable under the **Defaults** page.

Defaults

To configure the default travel settings:

1. Navigate to **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**.
5. Changes will apply to all newly created or updated itineraries for the entire Organization. Expected locations for existing itineraries will not be re-calculated.

The table below describes each event available, its default value, the configuration options for that event, and recommended (best practice) values for each event.

Event	Default Value	Configuration Options (can be enabled individually)	Recommended Best Practice
Hotel Check-In Note: One hotel	The original hotel check-in time	Point in time: • The time configured as the check-in	4PM

Event	Default Value	Configuration Options (can be enabled individually)	Recommended Best Practice
segment has one expected location.		time. The time zone is the hotel's local time zone, OR • Length of time before check-in	
Hotel Check-Out Note: One hotel segment has one expected location.	The original hotel check-out time	Point in time: • The time configured as the check-out time. The time zone is the hotel's local time zone, OR • Length of time before check-in	10AM
Flight Departure	24 hours before departure	1 to 12 hours (by hour increment) before departure	3 hours
Flight Arrival	24 hours after arrival	1 to 12 hours (by hour increment) after arrival	2 hours
Train Departure	24 hours before departure	1 to 12 hours (by hour increment) before departure	1 hour
Train Arrival	24 hours after arrival	1 to 12 hours (by hour increment) after arrival	1 hour
Max Flight/Train Connection Time	4 hours	1 to 12 hours (by hour increment)	4 hours
Car Rental Pickup	24 hours before pickup	1 to 12 hours (by hour increment) before pickup	1 hour

Event	Default Value	Configuration Options (can be enabled individually)	Recommended Best Practice
Car Rental Return	24 hours after return	1 to 12 hours (by hour increment) after return	1 hour
Other	24 hours	1 to 12 hours (by hour increment)	

NOTE: These settings apply to all newly created or updated itineraries for the entire Organization. No existing itinerary data is impacted by changes to these settings.

Maintain Contact at Their Expected Location

Because of the expected location range, by default for a multi-segment itinerary, an expected location may start sometime after the expiration of the previous one. When that occurs, the traveler has no expected locations for the time between when the last expected location expires and the new expected location starts and **cannot be alerted if a risk event occurs**.

In this case, you can configure the system to keep the traveler in its expected location until the start of the next one by turning on the **Maintain traveler at their expected location** toggle.

Enabling this toggle will help bridge the gap between the expiration of an expected location and the start of the next expected location.

Expected Location Calculation for Transit

For Air and Train segments, by default, an expected location is created for each side of the segment (arrival and departure). However, a single expected location will be created in the case of transit.

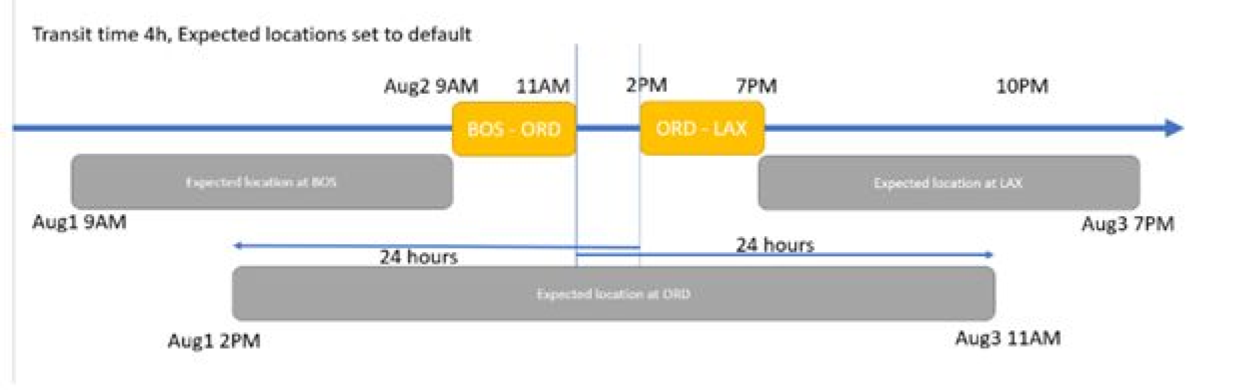
Transit occurs when the traveler arrives and departs from the same airport/train station within 4 hours (by default). The max transit time is also configurable and can be extended/reduced from 1 to 12 hours.

In the case of transit, the expected location range will ALWAYS take the earliest to the latest of the dates/times (calculated or actual arrival/departure). If the default configuration is used, the calculated expected location range for transit will be:

- **Start**: 24 hours before the departure date/time of the second segment.
- **End**: 24 hours after the arrival date/time of the first segment.

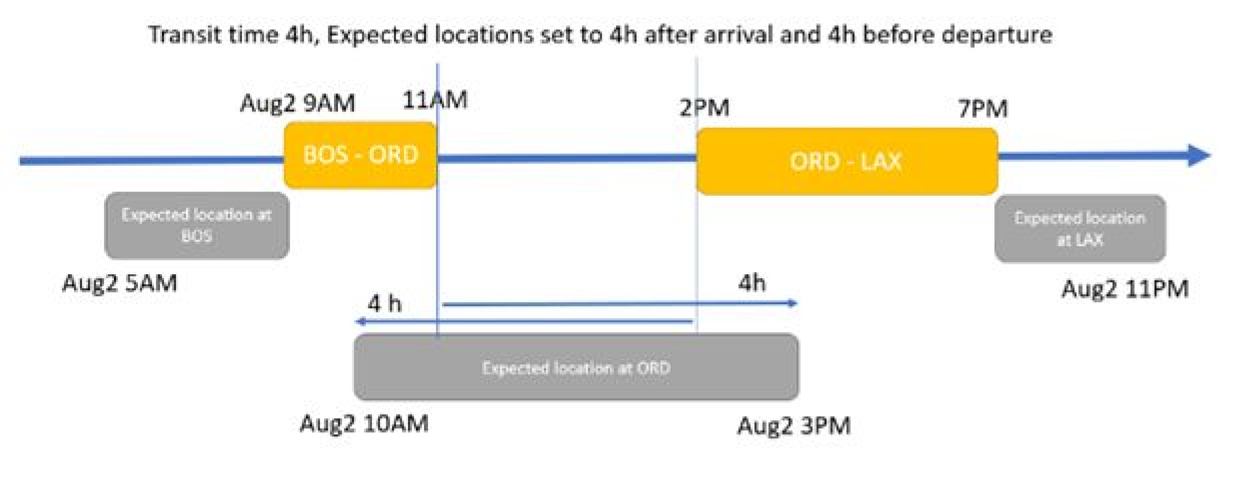
Example: Trip from BOS to LAX with a three-hour layover at ORD.

1. Depart from BOS at 9AM.
2. Arrive at ORD at 11AM.
3. Depart from ORD at 2PM.
4. Arrive at LAX at 7PM.



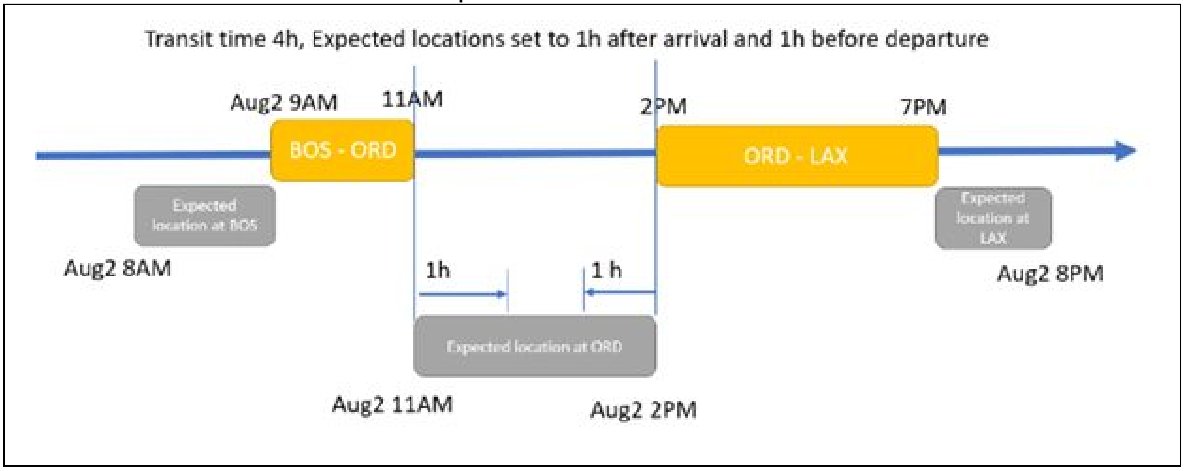
If the configuration was changed with X being the time BEFORE departure and Y the time AFTER arrival, the expected location range for transit will be:

- **Start**: X hours before the departure date/time of the second segment.
- **End**: Y hours after the arrival date/time of the first segment.

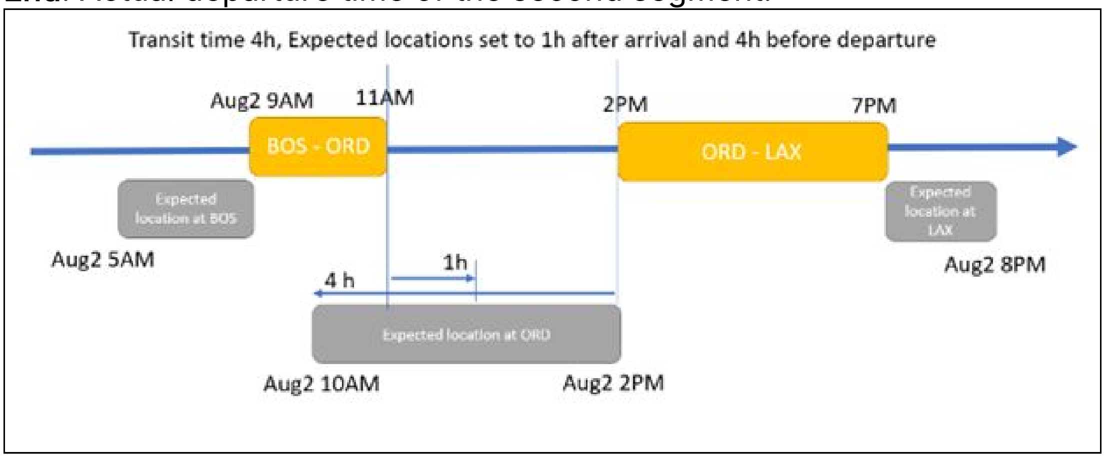


EXCEPT in the following conditions:

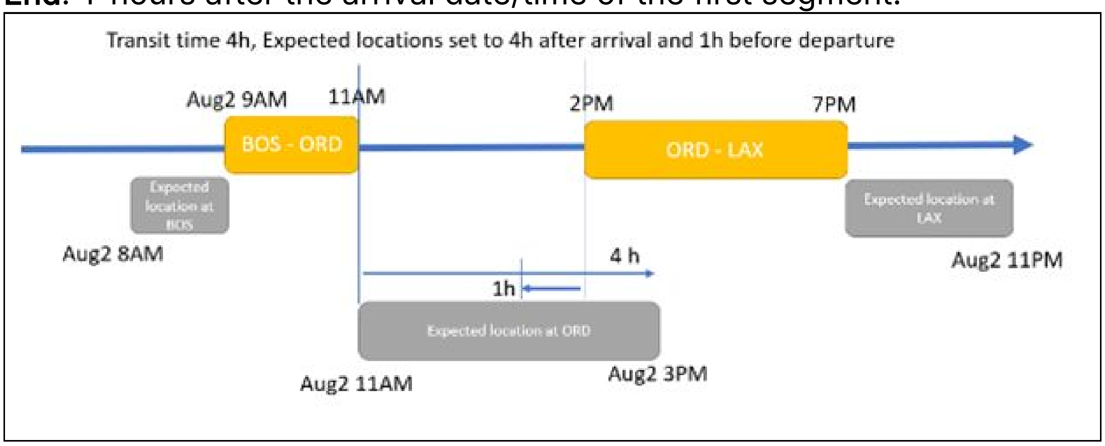
- If X + Y is less than the actual transit time, then in this case the calculation takes the actual arrival and departure times.



- If Y < Transit time AND X > Transit Time, then in this case the range will be:
  - **Start**: X hours before the departure date/time of the second segment.
  - **End**: Actual departure time of the second segment.

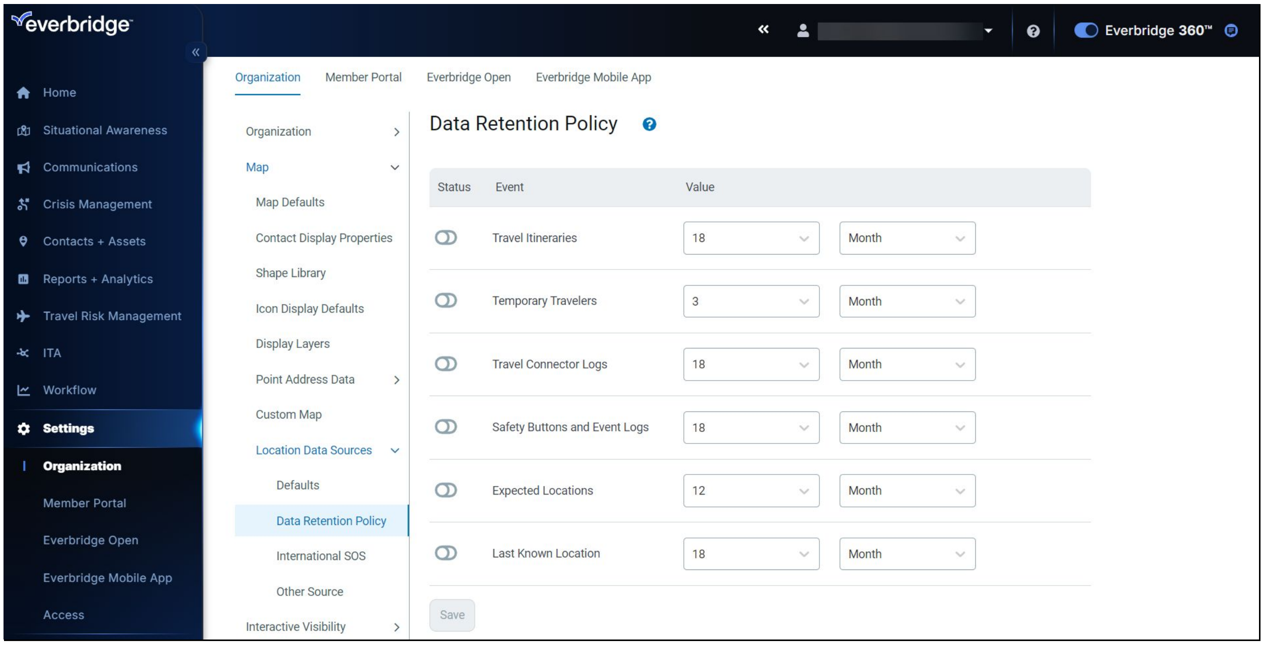


- If X < Transit Time AND Y > Transit time, then in this case the range will be:
  - **Start**: Actual Arrival time of the first segment.
  - **End**: Y hours after the arrival date/time of the first segment.



Data Retention Policy

If enabled for your Organization, you can set a data retention period for your Organization's events.



To set data retention periods for your Organization:

1. Navigate to **Data Retention Policy**.
2. Toggle on the Status of the desired event.
3. Change the values of the data retention according to the table below and click **Save**.

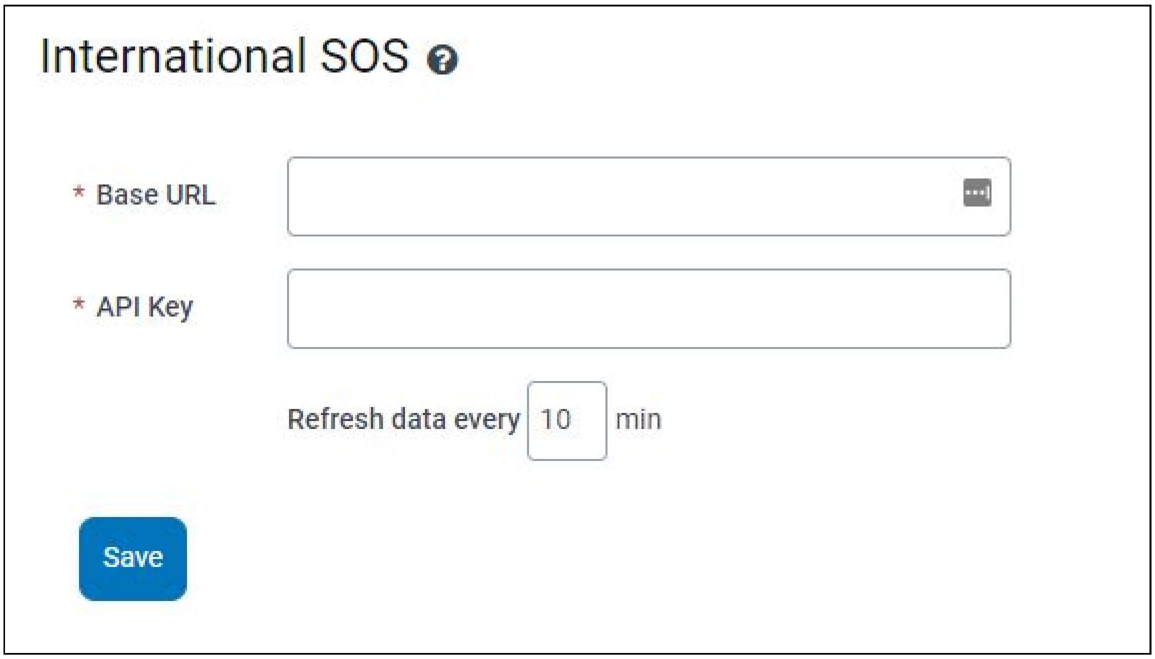
Event	Value	
Travel Itineraries	1-18 1-29	Months Days
Temporary Traveler	1 – 18 1 -29	Months Days
Safety Buttons	1-18 1-29	Months Days
Connector logs	1-18 1-29	Months Days
Expected Locations	1-12 1-29	Months Days
Last Known Location	1-18	Months

	1-29	Days

NOTE: Only available if Travel Protector is set up in your account.

International SOS

If International SOS was set up in your Account, then you will see this category in **Organization Settings**. Complete the required fields.



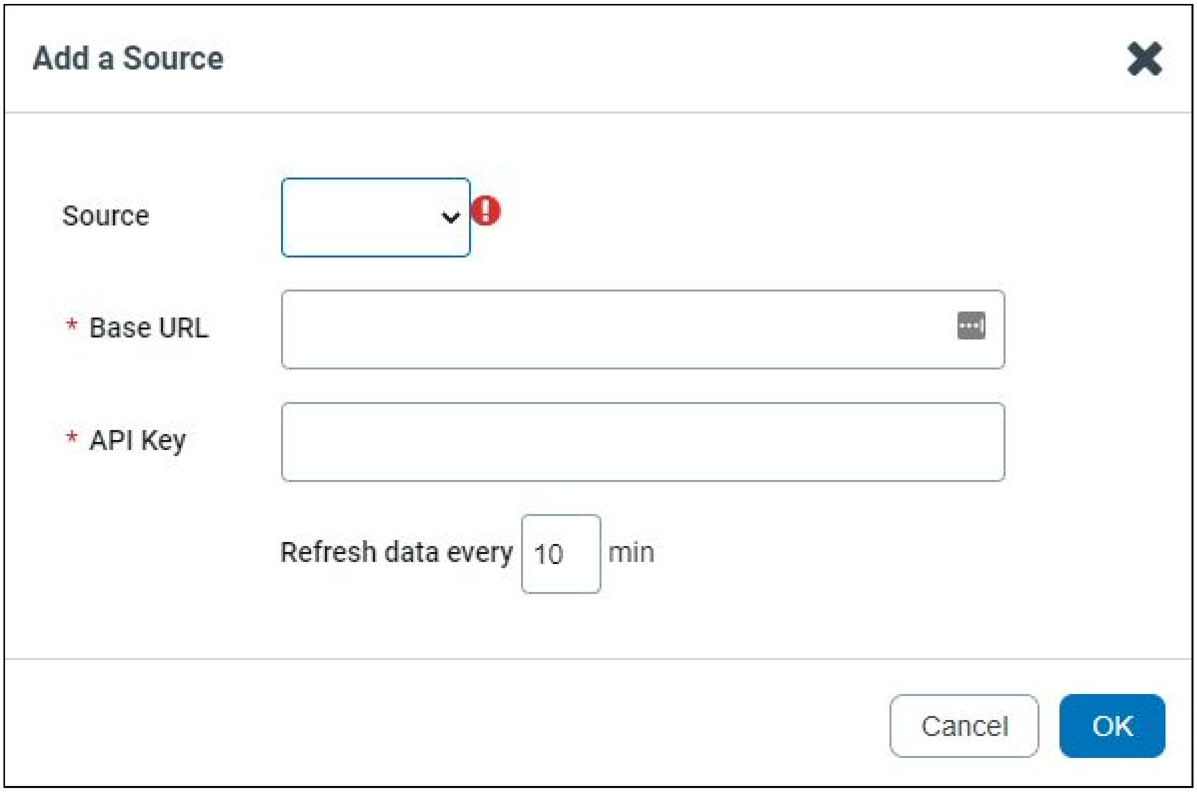
Once the API Key is saved, you can edit it, view the Refresh Log, or delete the configuration.

Other Source

If **Other Source** was set up in your Account, then you will see this category in Organization Settings.

To add an Other Source:

1. In the upper left-hand corner of the page, click **Add**. The **Add a Source** dialog box appears.
2. In the **Source** menu, select your source: Concur, Office 365, or Magnatech.
3. Enter your base URL in the **Base URL** field.
4. Enter your API Key in the **API Key** field.
5. Click **Save**.


Add a Source
Source
* Base URL
* API Key
Refresh data every
10
min
Cancel
OK

Interactive Visibility

Interactive Visibility combines message recipient feedback, external data feeds, and social media in a single communications console. This gathers real-time data from multiple sources for administrators to make better-informed decisions and efficiently manage the life cycle of critical incidents.

Member Messages

The **Member Messages** section displays relevant Member Message settings, any current thresholds, and their on or off status.

You can define the Member Messages Settings and configure custom categories on which users can report.

Settings

You can define the Member Messages Settings and configure custom categories on which users can report using the application.

Configure Member Messages Settings:

To configure Member Messages Settings:

1. In the **Contact Record Types** pane, select the **Allowed** checkboxes, as desired.
   - Contacts in the selected record types will be able to send a message to you at any time.
   - When selected, message recipients can send unsolicited messages back to the Everbridge system. This allows users to report information into the client, based on the defined Categories.
2. In the **Category** pane, click **Add Category**.
3. In the **Category Name** field, type a name, select the icon to display on the map, then click **Save** in the **New Category** dialog.
4. Click **Save** at the bottom of the page.

Edit a Category

To edit an existing message category:

1. From the **Member Messages: Settings** page, click the Pencil icon in the row of the category to be changed.
2. Rename the **category**.

3. Click **Save**.

Delete a Category

To delete a category:

1. Click the Trash Bin in the row of the category to be deleted.
2. Click **Yes.**

Thresholds

To automatically receive alerts from unsolicited messages, configure the options on the **Member Messages: Thresholds** page.

For each threshold, you can see the name and criteria that will trigger an alert. If the alert will send a Notification, the name of the template is shown on the page.

The **Status** shows whether a threshold is currently active. If it is inactive, it is still configured but is not currently monitoring information.

The number of Active and Inactive thresholds appears at the right-hand corner of the **Current Thresholds** pane. You can have up to five thresholds.

Add a Threshold

To add a Threshold:

1. Type a number and select Minutes or Hours for the **For messages coming within NN minutes/hours of each other** field.
2. Optionally, select the desired check box or check boxes and select from the corresponding menus:
    - **Category is** - Select from the list of categories.
    - **Message text contains** - Type the keyword.
    - **Sender's Record Type is** - Select from the list of record types.
    - **Message location is** - Type a number, select Feet, Meters, Kilometers, or Miles from the drop-down list, and type the address.
3. On the right-hand pane, select whether or not to trigger a Notification.
    - By default, the **Display an alert in the Universe tab** check box is selected.
    - Optionally, select the **Launch a Notification** check box.
        - If you select this check box, you can select a Notification Template to add to the Threshold.
        - To remove a Notification Template from the Threshold, click the Trash Bin to the left of the Notification Template name.

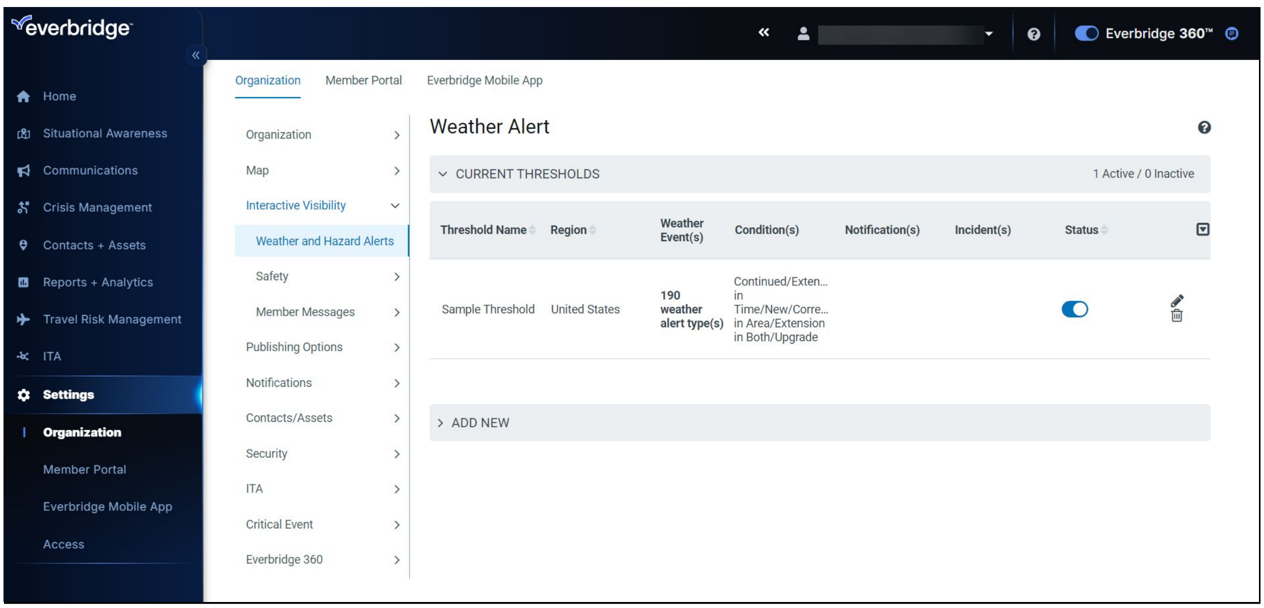
4. Type the number of alerts that must occur prior to displaying an alert regarding your Member Messages threshold.
5. In the **Threshold Name** field, type a name.
6. Click **Save.**

Setting Up Thresholds

Threshold criteria can be based on the type, condition, and geographic location of the weather event. When a threshold is triggered, an alert will automatically be sent to the Organization's Universe tab for display in the Weather widget.

The alert triggered by the threshold will be available in the **Weather widget** on the Universe tab for 7 days and will contain the full text of the alert issued by the NWS when your Global Region is the United States. The user can also view the geographic region affected by the weather event by viewing the polygon on the Universe map. That polygon can also be used to select contacts, should the Organization want to send a Notification to contacts in the affected region.

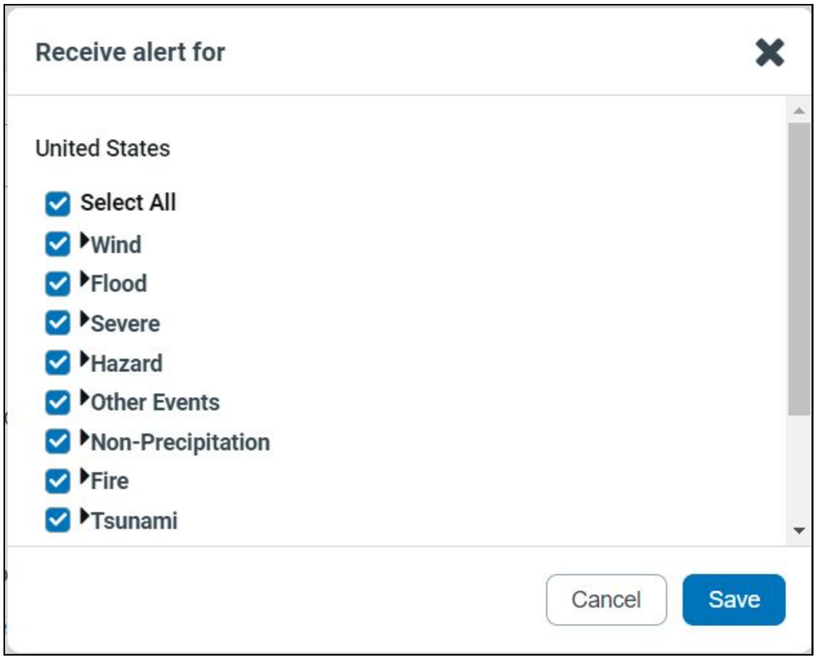
Additionally, users can identify one or more Notification templates to be launched automatically when the threshold is triggered.



Adding a New Threshold

To add a new Weather Alert Threshold:

1. In the **Name** field, enter a threshold name.
2. In the **Global Region** field, select the desired region from the drop-down list: United States or Europe.
3. Under **Event Type**, select the Edit link:
   - Select All—all the events in the subscription.
   - Only these events—selected types. Select the events and categories for which you want to receive alerts, and click Save.



4. Select the condition. Choose one or more from Canceled, Continued, Expired, Extension in Time, New, Correction, Extension in Area, Extension in Both, and/or Upgrade.

   The automated alerts will be sent only for the selected conditions. The condition of the weather event is assigned directly by the NWS.

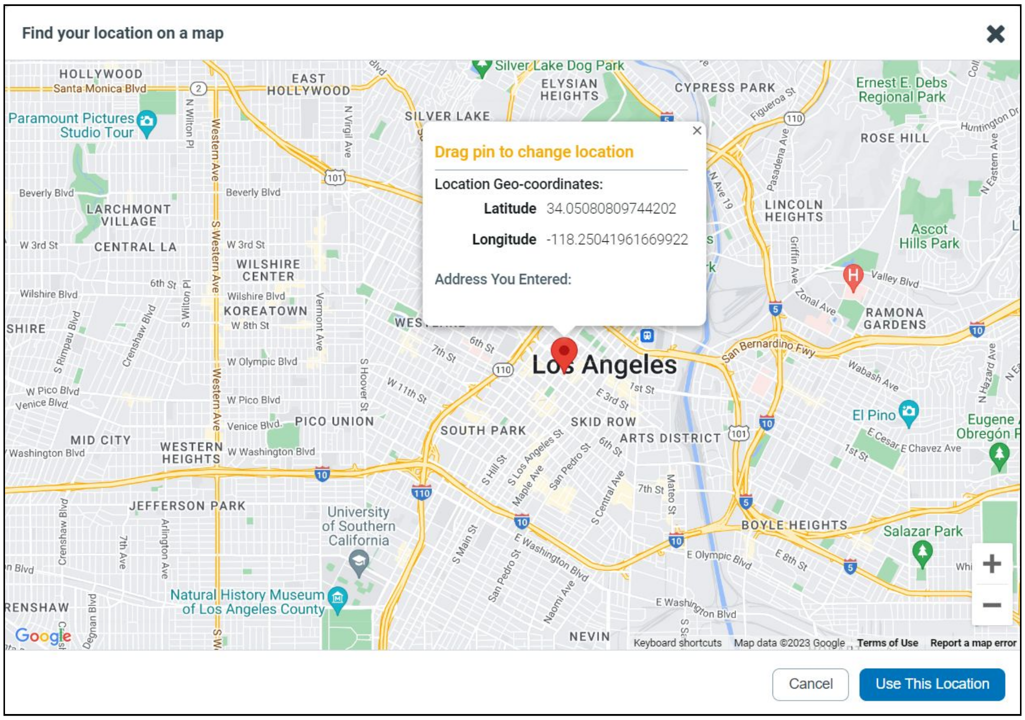
   > **NOTE:** Although the NWS can send New, Continue, Cancelled, and Expired types of alerts, Everbridge Suite only processes New, Cancelled, and Expired alerts; not Continue. If users are included in a Continue update, they will not receive the alert from SMART Weather Alerting, but might receive the Cancelled or Expired alert.

5. Type an Address location to include in the Weather Alert. Required fields are shown with an asterisk (*).

   > **NOTE:** Weather Alerts support only United States locations at this time.

   - The system finds the address on the map and identifies the associated latitude and longitude. There might be several possibilities, based on what you enter.
     - From the Select Address drop-down list, select the correct address.

- To verify the location of the address, select the link: **Find location on a map**. A window opens, which shows the address you entered on a map. (You can zoom in if needed.)



- To change the location, drag the pin to its new location. When you have the correct location of the pin, select the Close (X) button in the right-hand corner of the Find Location On Map dialog.
- You can add up to five addresses in a single threshold by selecting the link: Add another address, and repeating Step 3.

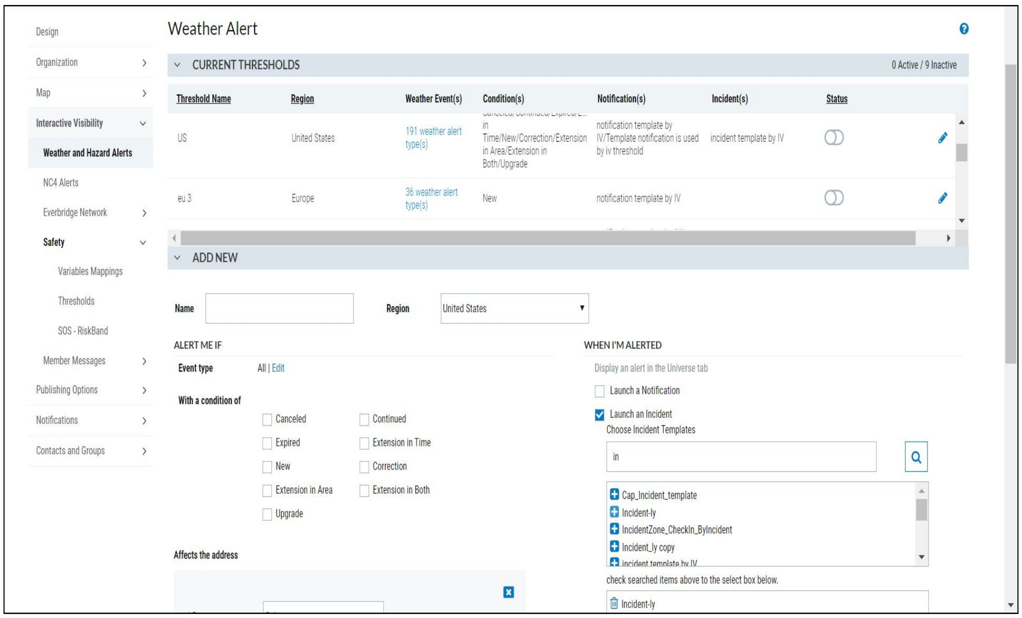
  For example, if you have several offices, you might want to be alerted if severe weather is forecast for any of them. The alert is triggered if the type of warning you selected includes these addresses.

6. On the right-hand pane, select whether or not to trigger a Notification and/or incident.
   - By default, the following check box is selected: Display an alert in the Universe tab. (The alert will always be displayed on the Universe tab in the Weather widget.)
   - Optionally, select the check box to Launch a Notification and/or Launch an Incident.

     If you select one of these checkboxes, you can select a Notification Template/Incident Template to add to the Threshold.

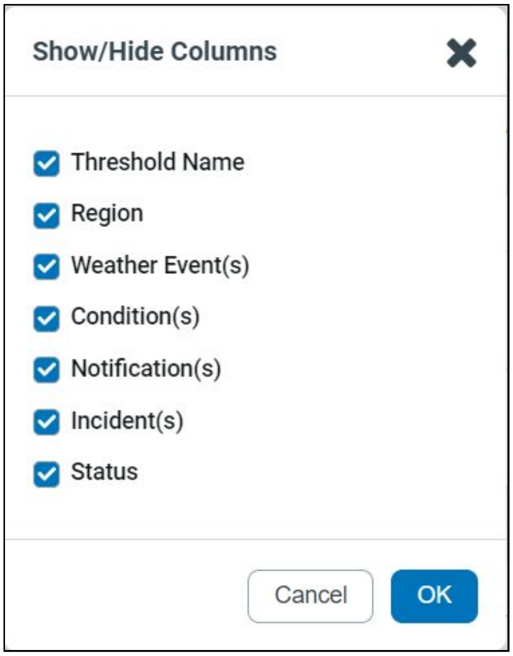
     - Optionally, to make the Notification part of an event, select the check box: Start the Event, and type the Event name.

- Choose one or more Templates to be used when the alert is triggered. One by one, search for the desired Templates and click Search. (You can search by keyword in the Title. Also, the search results will only return "complete" templates, meaning, templates that have all required elements: message title, message body, contacts, and delivery settings). Each template is displayed in the list box below the Search box.
- From this list, click the blue + sign next to the desired template to add it to the list of Notifications to launch when the alert is triggered. It is displayed in the lower list box.



- To remove a Template from the Threshold, click the Trash Bin to the left of the desired Template name.

7. Click **Save**. The new threshold is added to the list of Current Thresholds. Current thresholds are displayed at the top of the pane.
8. Show/hide the columns in Current Thresholds by clicking the Down arrow at the right-hand side of the column headings. The Show/Hide Columns dialog appears.

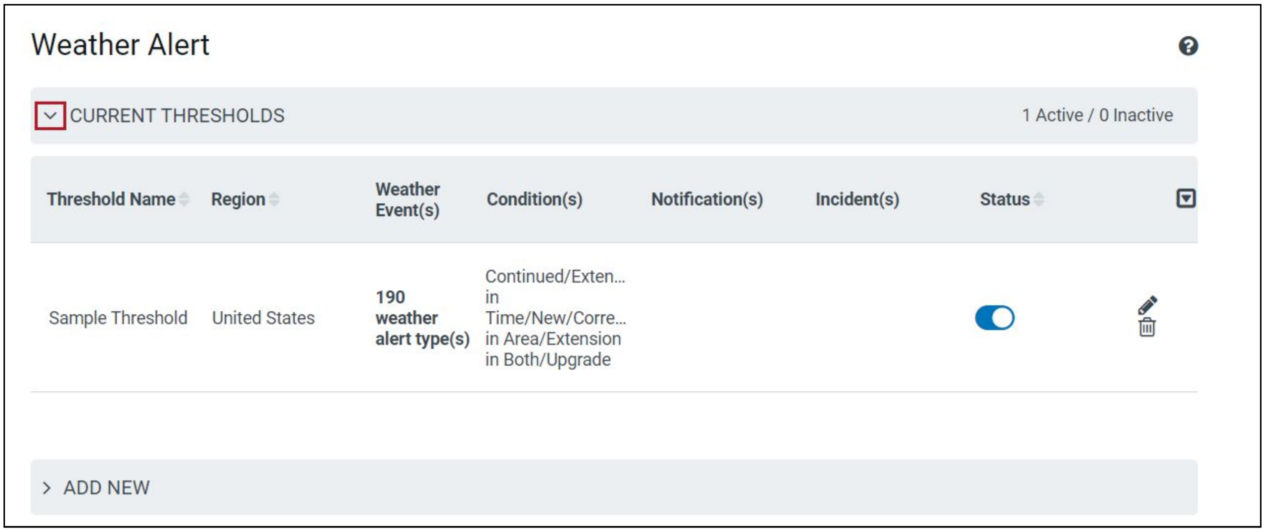


9. Select the desired checkboxes to show or hide the respective column headings and click OK. When the threshold is met, you see the summary on the Weather widget in the Universe tab.

Maintaining Current Thresholds

For each threshold, you can see the warning type and conditions that will trigger an alert. Hover the mouse over an entry to see the full list. 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 weather information. The number of Active and Inactive thresholds is displayed at the top of the list (right-hand corner). You can inactivate a threshold by clicking the ON/OFF switch.

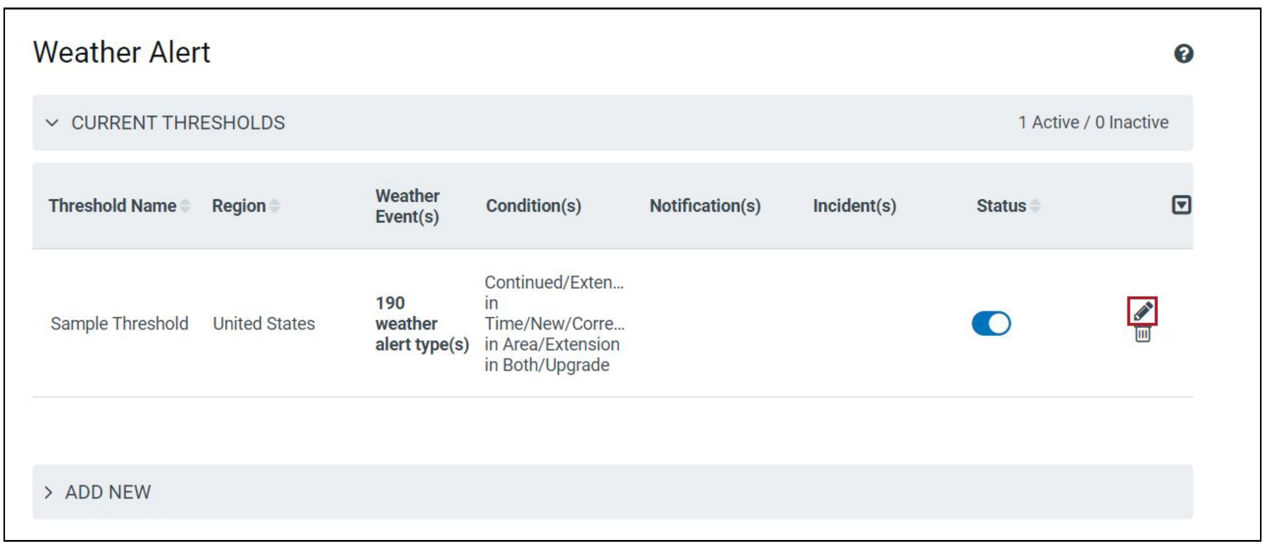
Collapse the Current Thresholds list by clicking the **Down** arrow at the top left-hand corner of the list. Expand the Current Thresholds list by clicking the Right arrow at the top left-hand corner of the list.



Edit Existing Weather Threshold

To edit an existing Weather threshold:

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



1. Click the Pencil icon along the threshold row. The threshold becomes inactive (Status: OFF).
2. Make your changes in the lower pane by performing the steps in the procedure .
3. Optionally, rename the threshold.
4. Click **Save**.
5. In the **Current Thresholds** panel, set the **Status: OFF** to toggle to **ON**.

Delete Weather Threshold

To delete a Weather threshold:

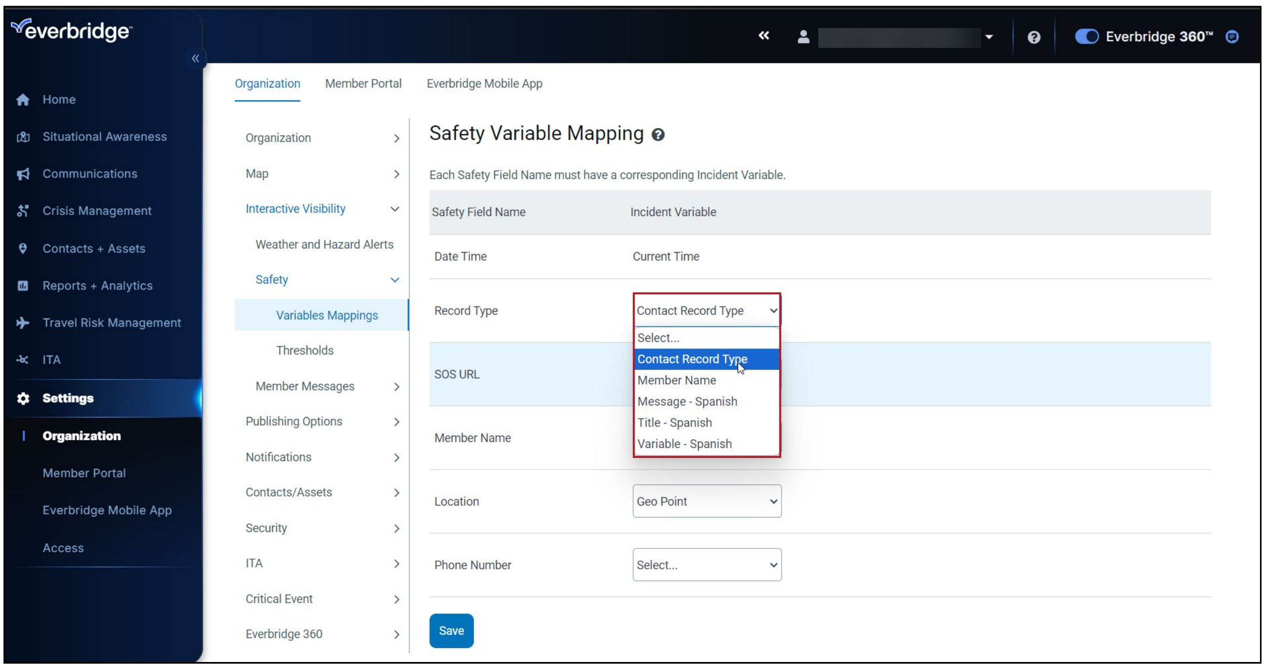
1. Click the Trash Bin in the row of the threshold to be deleted.
2. Click **Yes** to confirm that you want to delete the threshold.

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

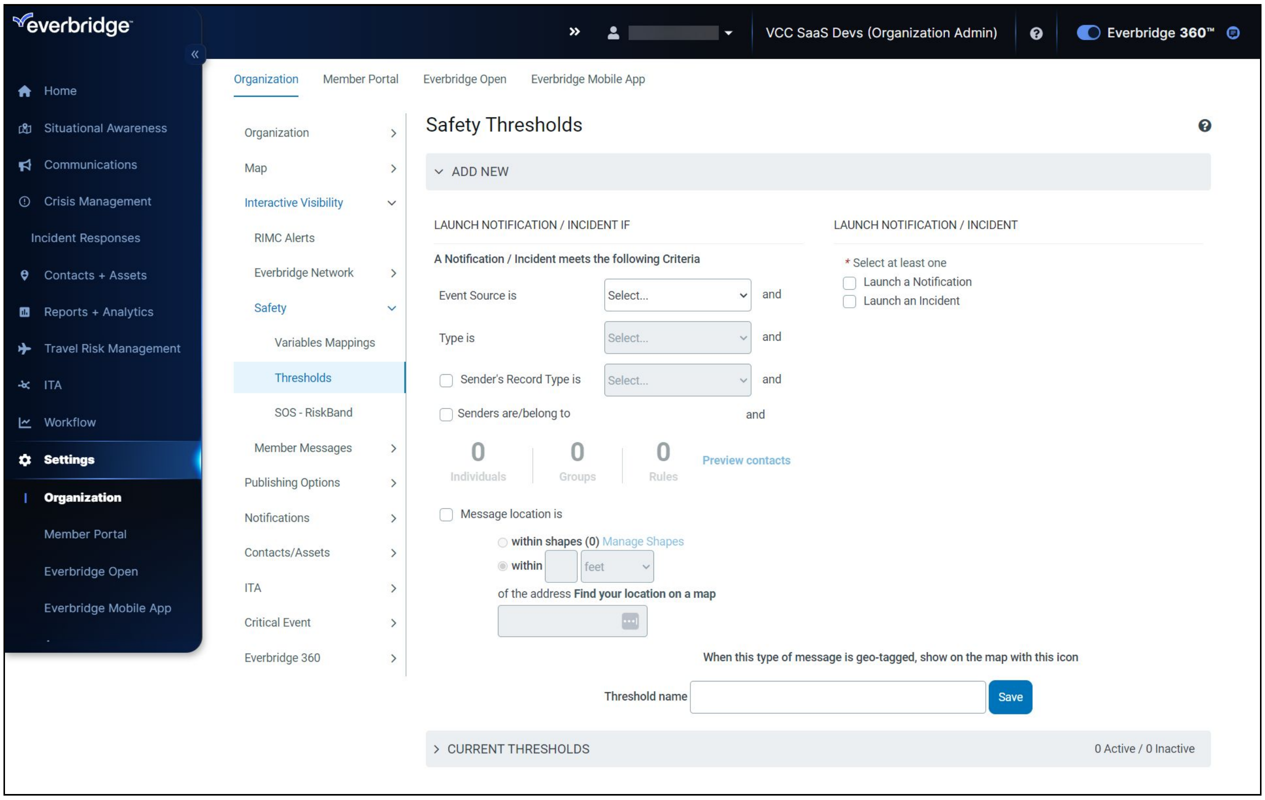
From the drop-down box of each field, select the Incident variable name to be included in your Safety Alert. Only Text Area and Text Box variable types are included in the drop-down lists.



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.

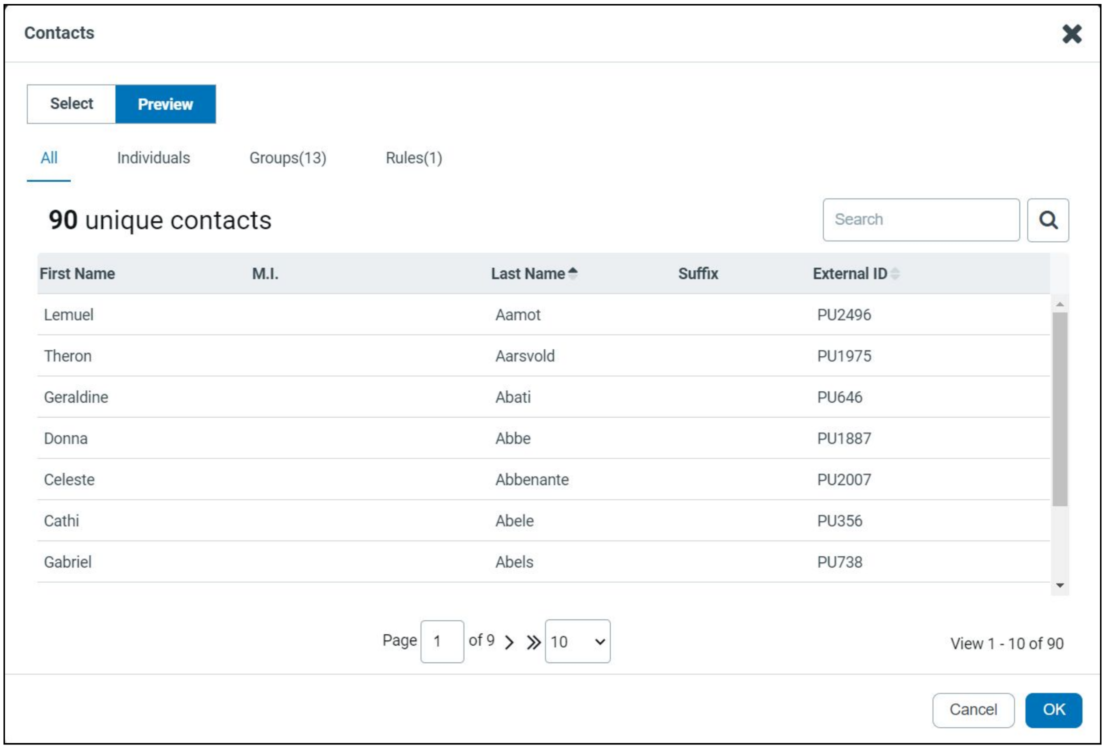
You can hide the entire panel by clicking the panel heading. Click it again to reopen the panel.

Add a new Safety Threshold

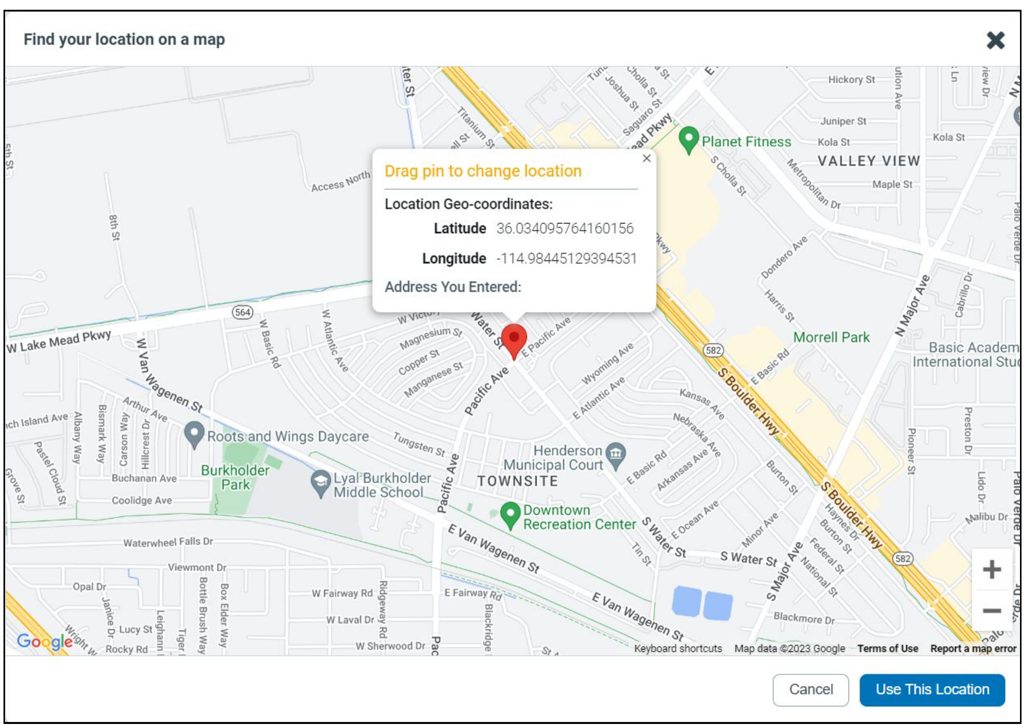
To add a new Safety Threshold:

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.

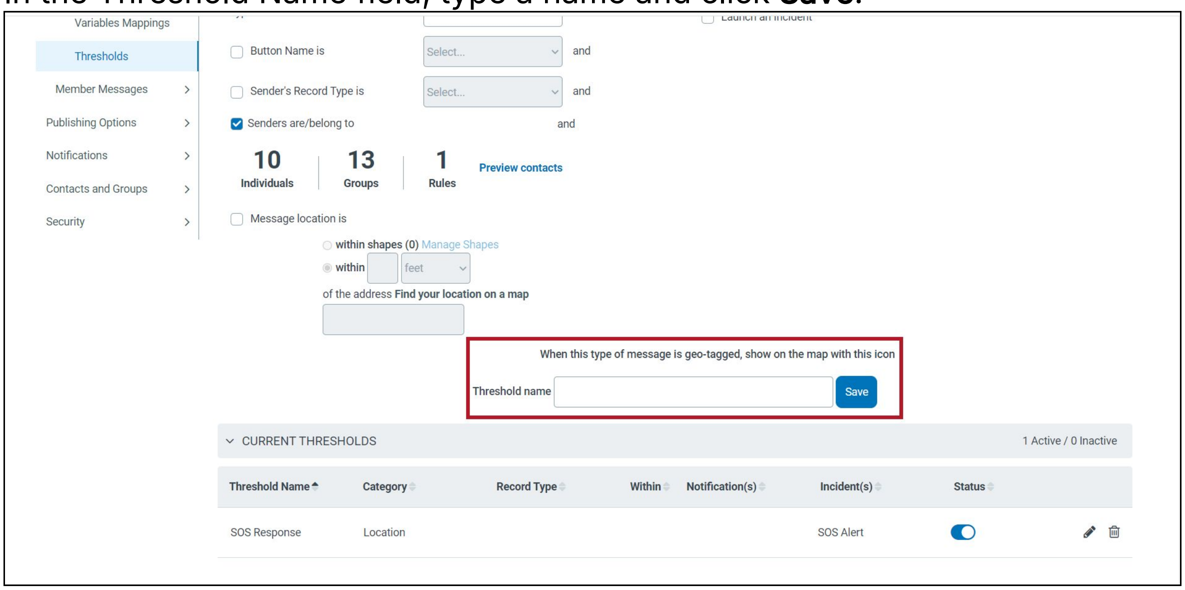
     Optionally, select **Preview Contacts**. From the **All** subtab, you see the names of all the contacts you have selected, whether as Individuals, from a group, or a rule. When previewing from a group, select the group name from the drop-down list to see the individuals in that group. Or, select **Preview**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

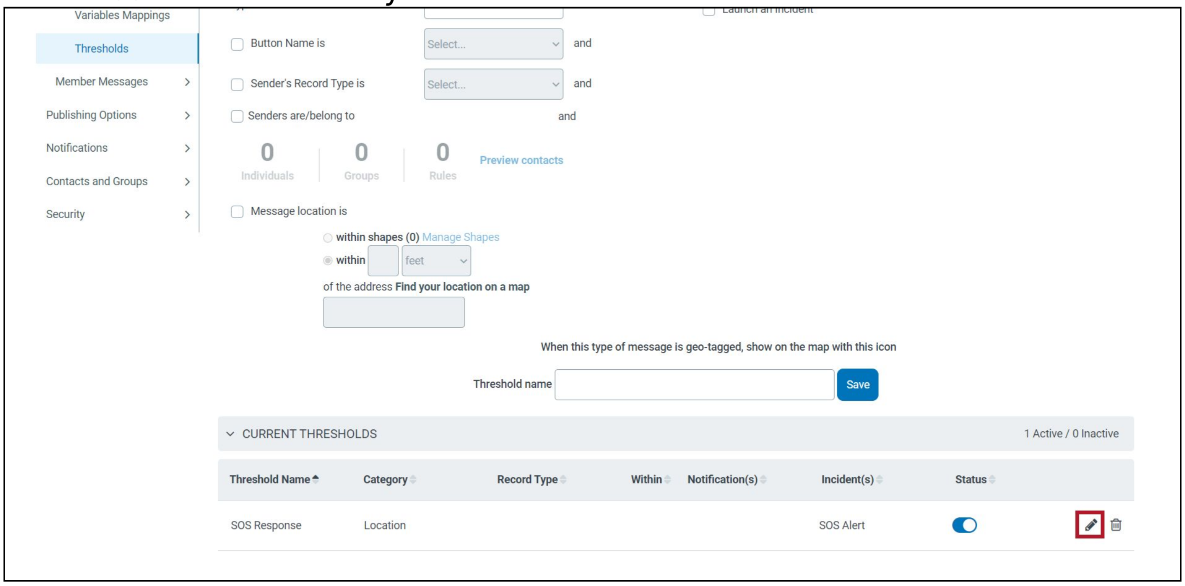


Edit an existing Safety threshold

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).

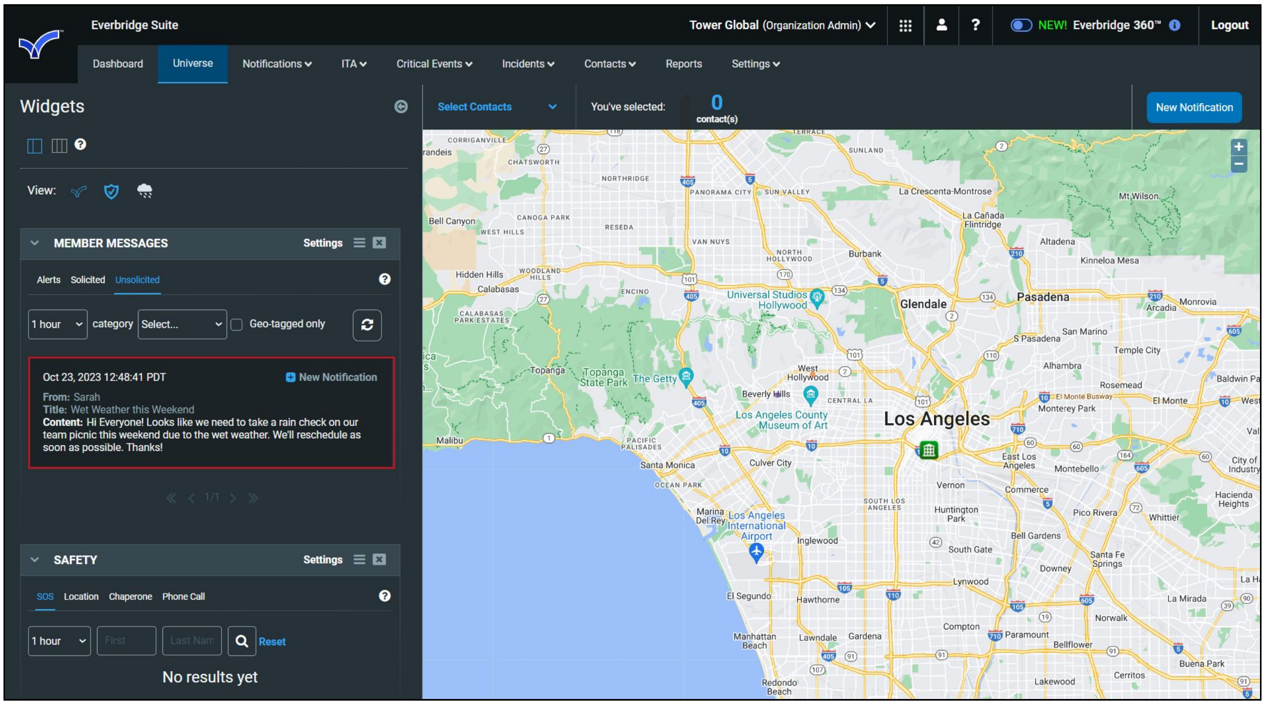
1. Click the **Pencil** icon corresponding with the desired threshold you want to edit. The threshold becomes inactive (Status: OFF). If not, tap the Status: ON.
2. Make your changes in the upper pane by performing the steps in the procedure .
3. Optionally, rename the threshold.

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.



Unsolicited Messages

Contacts may be permitted to send unsolicited messages using Everbridge if they need to contact the Organization. Unsolicited messages are different than replies because no Notification has been sent. For example, an employee on his way home might want to let others know about the heat warning. The Organization could then notify other employees to avoid traveling during the hottest time of the day.



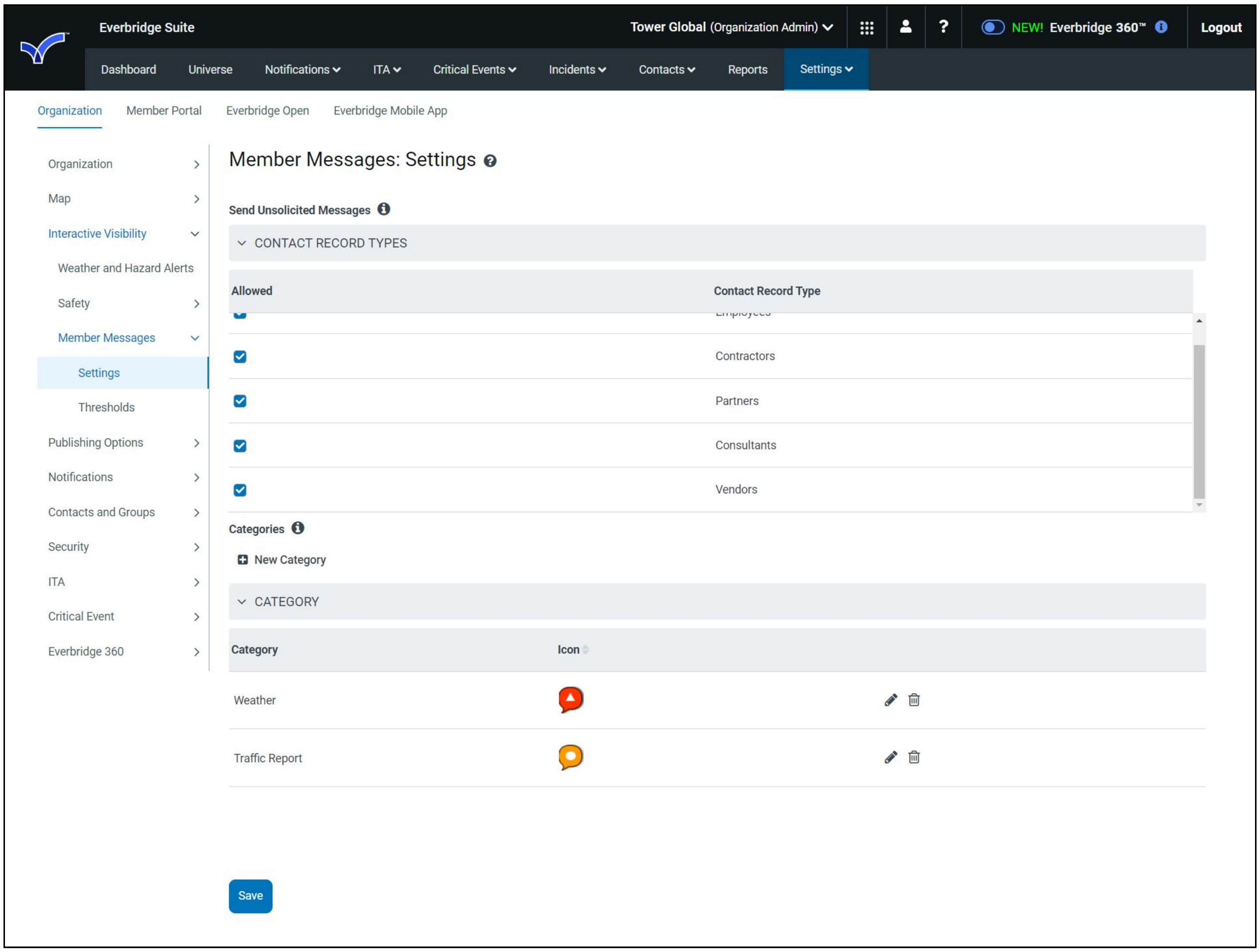
View unsolicited messages from the **Unsolicited** tab of the **Member Messages** widget from the Universe tab. The controls for viewing unsolicited messages are the same as those for viewing replies. There is an additional **Category** drop-down list that allows you to filter the messages by category. By default, you will see all unsolicited messages sent during the selected time frame.

When the contact created the message, they selected a category from the list configured for your Organization. (Example categories: Security Concern, Emergency, General Inquiry, Request.)

Choose a category from the drop-down list and you will only see messages tagged with that category.

Configuring Member Messages Settings

You can define the Member Messages settings and configure custom categories on which the application users can report using the application. The main approach is to reach individuals.



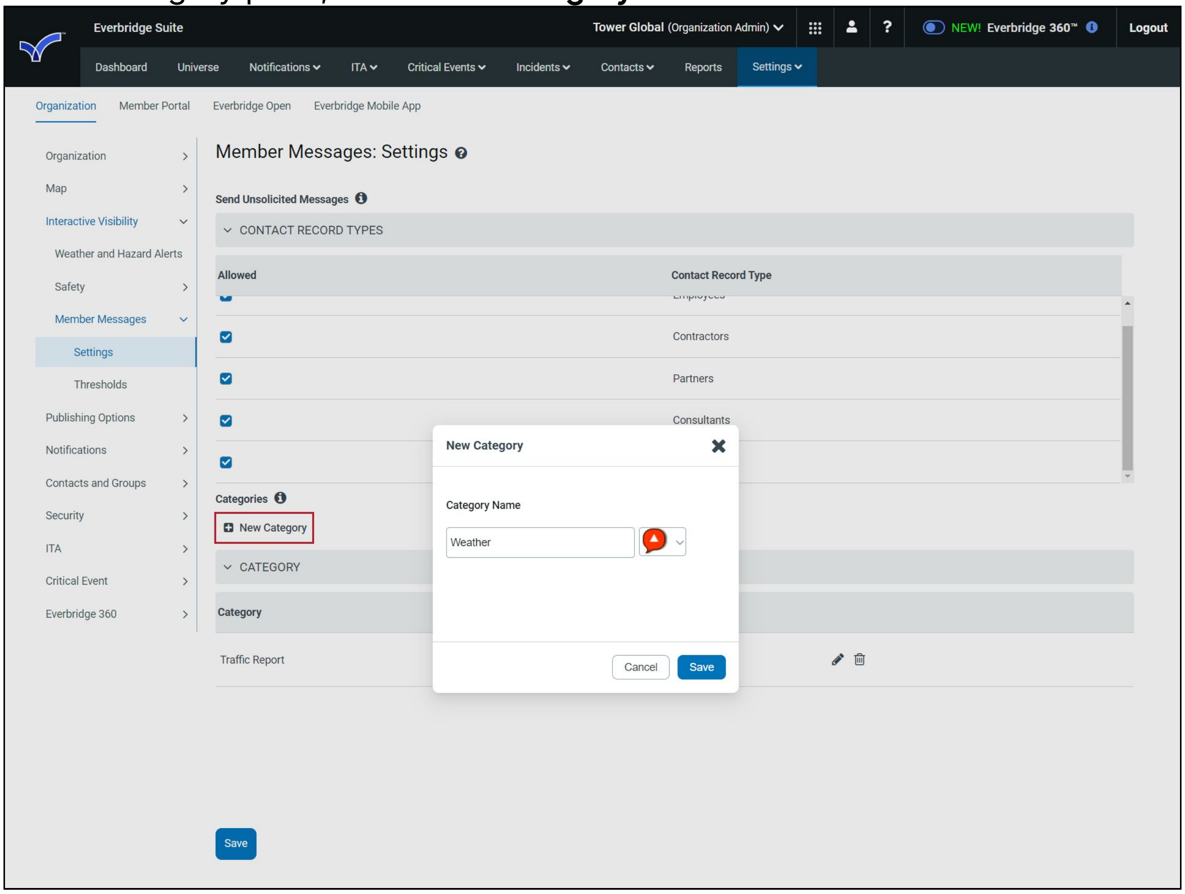
The Everbridge Mobile application must be installed but does not have to be running. A push Notification is sent to the application. The contact (member) confirms receipt using Polling or Conference bridge. Contacts can respond with their locations and images they capture on-site.

To configure Member messages:

1. Select the **Allowed** checkboxes in the **Contact Record Types** pane as desired. Contacts in the selected record types will be able to send a message to you at any time.

   When selected, the end-user can send unsolicited messages back to the Everbridge system. This allows users to report information to the client based on the defined Categories.

2. In the Category pane, click **New Category**.



3. In the **Category Name** field, type a name, select the icon to display on the map, then click **Save** in the New Category dialog. Example category names: "Violence Report," "Civil Unrest Report," "Traffic Incident Report," etc.
4. Click **Save**.

To edit an existing Custom Category:

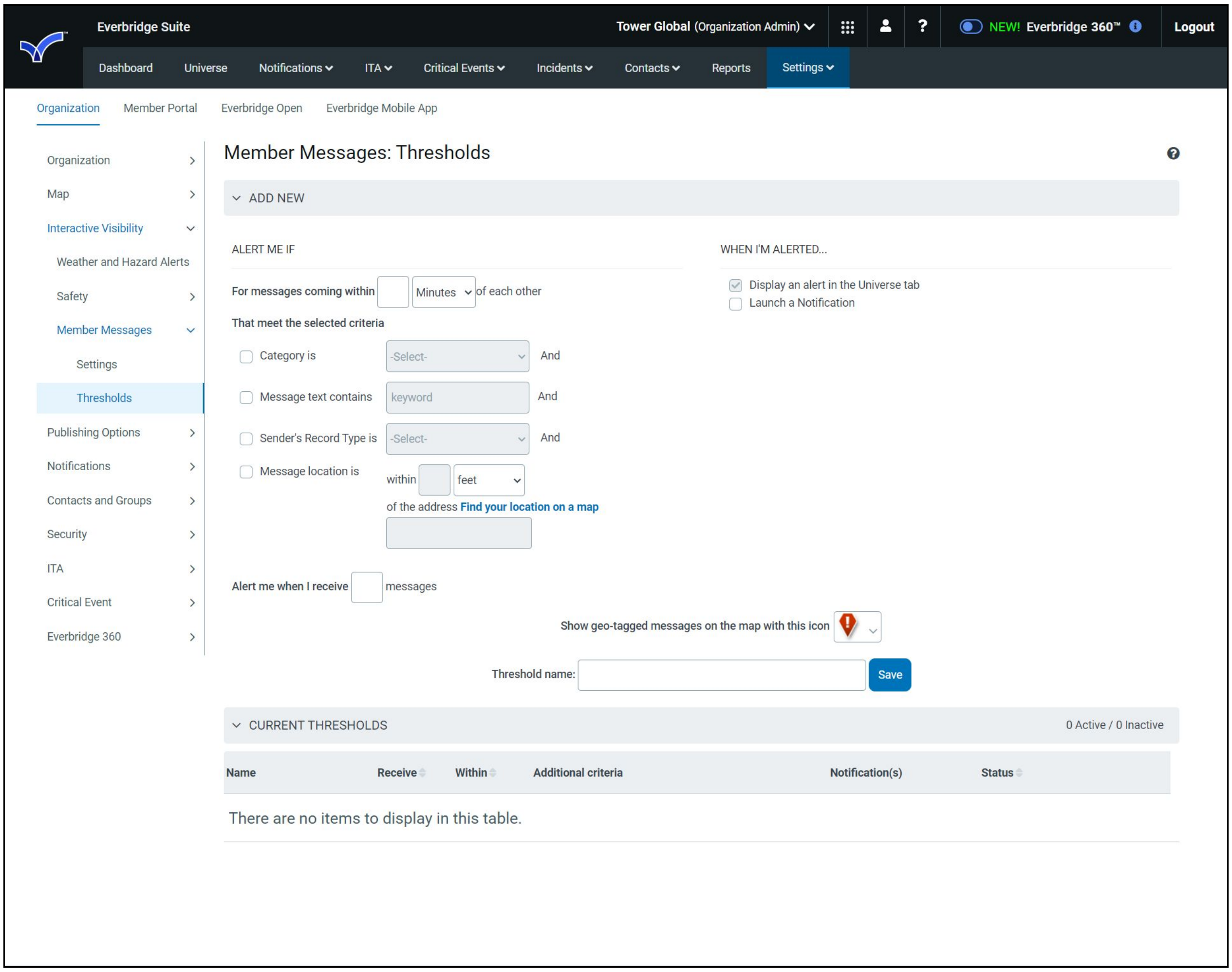
1. From the Member Messages page, click the **Pencil** icon in the row of the category to be changed.
2. Follow the steps in the procedure To configure Member messages.
3. Optionally, rename the category.
4. Click **Save**.

To delete a Custom Category:

1. Click the **Trash Bin** in the row of the category to be deleted.
2. Click **Yes** to confirm that you want to delete the category.

Member Messages: Thresholds

To automatically receive alerts from unsolicited messages, configure your Member Messages: Thresholds. When you select Settings > Interactive Visibility > Member Messages > Thresholds, the Member Messages: Thresholds page appears. It displays any Current Thresholds and their on/off status. You can have up to five thresholds. You can also add a new 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 information. The number of Active and Inactive thresholds is displayed at the right-hand corner of the Current Thresholds pane. You can activate/inactivate a threshold by clicking the ON/OFF toggle.

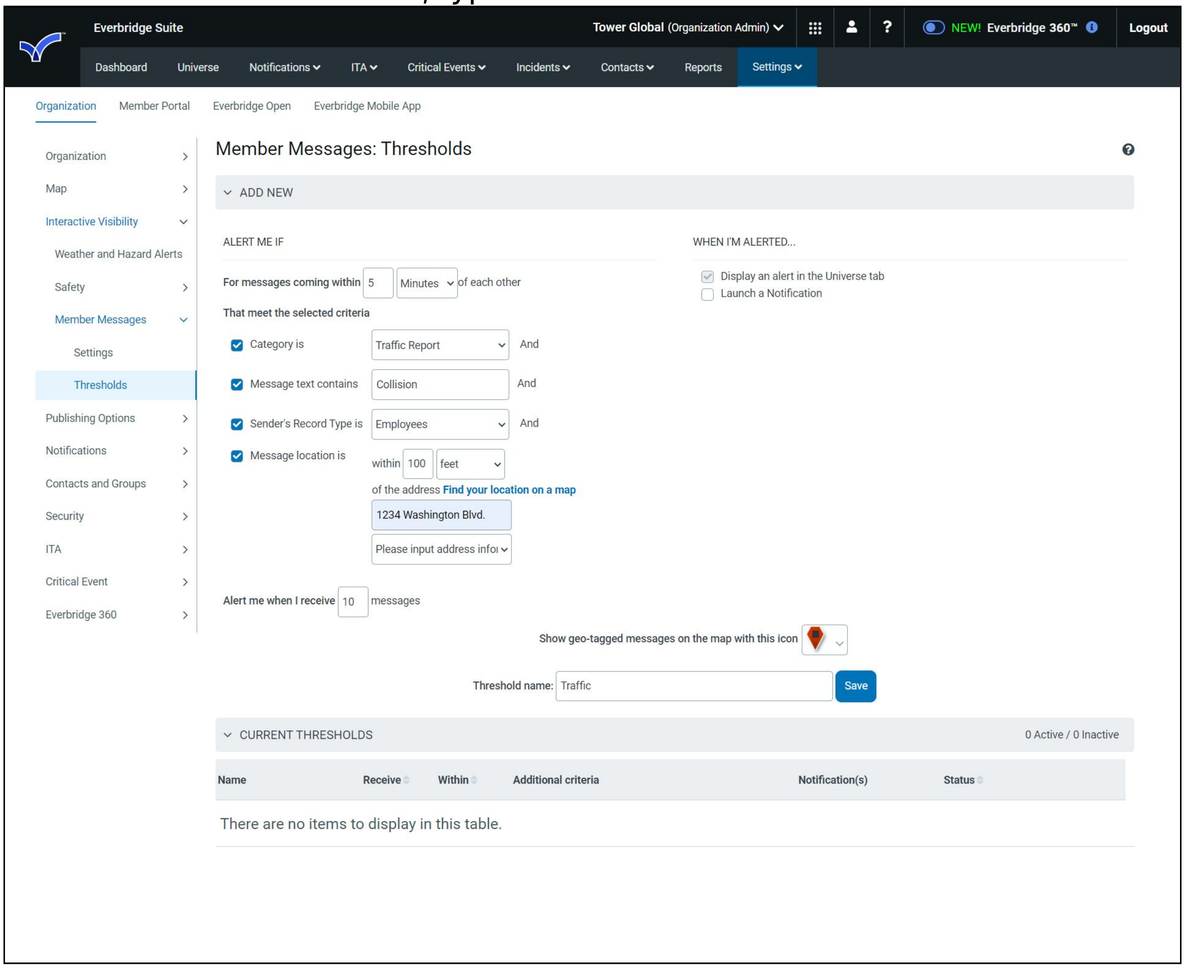
Collapse the Current Thresholds list by clicking the **Down** arrow at the top left-hand corner of the Current Thresholds pane. Expand the Current Thresholds list by clicking the **Right** arrow at the top left-hand corner of the pane. You can hide the entire panel by clicking the down arrow next to the Current Thresholds header. Click it again to open the panel.

Configuring Member Messages: Thresholds

1. Type a number and select Minutes or Hours for the field: For messages coming within NN minutes/hours of each other.
2. Optionally, select the desired check box or check boxes and select from the corresponding drop-down lists:
   - **Category is** - Select from the list of categories.
   - **Message text contains** - Type the keyword.
   - **Sender's Record Type is** - Select from the list of record types.
   - **Message location is** - Type a number, select Feet, Meters, Kilometers, or Miles from the drop-down list, and type the address.
3. On the right-hand pane, select whether or not to trigger a Notification.
   - By default, the check box: Display an alert in the Universe tab is selected.
   - Optionally, select the check box to Launch a Notification.

     If you select this check box, you can select a Notification Template to add to the Threshold.
     - 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. Type the number of alerts that must occur, related to your criteria, prior to displaying an alert regarding your Member Messages threshold.

5. In the Threshold Name field, type a name and click **Save**.



Organization Publishing Options

Everbridge Suite offers several options for sending Notifications to a gateway. This allows a wide distribution of important information for an Organization to its followers, even if they are not Everbridge contacts or users.

A publishing option is visible only if it is enabled for your Organization.

Social Media

Everbridge Suite allows Notification publishing to the following Social Media outlets:

- **Facebook** — Administrators can post Notifications to Facebook pages that they administer.
    - Click **Sign in with Facebook** and follow the directions on the sign-in page that appears.
- **Twitter** — Administrators can post tweets to Twitter accounts that they administer.
    - Click **Sign in with Twitter** and follow the directions on the sign-in page that appears.

The table on the **Social Media Accounts** page shows the status of the alert and its expiration date. Messages posted to Facebook expire after 60 days, while messages posted on Twitter do not expire.

Everbridge Network

Use this Publishing Option to post messages within the Everbridge client community. This may be of benefit to you if you would like other Everbridge clients to be informed of an event or incident affecting your Organization.

The Notification will be published to the Organizations and/or areas you have indicated. Optionally, you can use a shape to specify the impacted area to your network.

Organization Identity

Use this option to configure whether your Organization's logo will display when messages are published. You can also select from the following areas of responsibility for your Organization:

- **None**

- **Upload shape**
- **Shape Library**

Subscribe & Publish

Use this option to select specific categories of Organizations to which to send Notifications. This is useful, for example, if you want to send Notifications to specific industries. You can also configure your network's **Subscribe & Publish** settings. Click Save when you have made changes.

To choose specific categories of Organizations:

1. Select **Only those in specific categories**.
2. Click **specific categories**. The **Select Categories** dialog appears.
3. Select one or more categories and click **OK**.

Audio Bulletin Board

The Audio Bulletin Board is a feature that enables an audience to retrieve an audio message at their convenience. It is similar to a voice mail system, where you leave a message and others retrieve the message.

This feature is useful for reaching all the contacts affected by an event or an incident that would affect those contacts. For example, use this feature to notify the surrounding community of the status of a hospital or government building that was closed for safety reasons.

There are two types of Audio Bulletin Boards: **Basic** and **Premium**. If an Organization has more than one Audio Bulletin Board, the different bulletin board names appear after selecting the Bulletin Board's check box. To configure a different bulletin board, click the arrow next to its name.

Everbridge Web Widget

By configuring an Everbridge Web Widget URL, you can send notifications to your designated website. You can configure a pre-selected default duration, which can be the same as the Broadcast Duration or a Custom duration by selecting from the drop-down list:

- 15 Minutes
- 30 Minutes
- 60 Minutes
- 1 Day (24 Hours)
- 3 Days (72 Hours)
- 1 Week (7 Days)

- 2 Weeks (14 Days)
- 1 Month (30 Days)
- 2 Months (60 Days)
- 3 Months (90 Days)
- 6 Months (180 Days
- 9 Months (270 Days)
- 1 Year (365 Days)

Everbridge Desktop Alerts

You can send a Standard Notification directly to your recipients' desktops. The recipients must have the Desktop Alerts client installed. Optionally, you can configure a default template or one must be selected later. These Desktop Alert templates are preconfigured for your Organization. You can configure a pre-selected default duration, which can be the same as the Broadcast Duration or a Custom duration by selecting from the drop-down list:

- 15 Minutes
- 30 Minutes
- 60 Minutes
- 1 Day (24 Hours)
- 3 Days (72 Hours)
- 1 Week (7 Days)
- 2 Weeks (14 Days)
- 1 Month (30 Days)

Web Posting

To initiate Notifications to partner systems or client-side websites, you can provide one or more URLs. As needed, provide a corresponding username and password for each URL. When sending your Notifications, you can select Web Posting as a publishing option and then select the check box for the specific URLs.

> **NOTE:** Since each implementation is unique, it is recommended that you work with your IT department to ensure proper configuration of the Web Posting feature.

Customer Web Service Requirements

The **Customer Web Service** receives the HTTP POST Notification from the Everbridge system.

To set up the Customer Web Service to receive Everbridge Notifications, the web service must meet the following requirements:

1. The web service must exist and be reachable from the Internet.
2. The web service endpoint must accept an HTTP POST of content type "application/json" with a JSON encoded body.
3. The web service may use HTTP Basic Authentication.
4. The web service may use SSL/HTTPS.
5. The web service must respond with a valid HTTP status code as an acknowledgment for successful or unsuccessful receipt of the Notification.

> **NOTE:** Response codes returned by external web services are logged by Everbridge for troubleshooting purposes. They are not currently reflected in the Notification reports in the Everbridge Notification Reports through the Manager Portal.

Everbridge Notification Format

An Everbridge Notification sent to the web service endpoint will be JSON-encoded and will have the properties shown in the following sample message:

{"title" : "Notification Title", "body" : "Notification Body", "fileAttachments" : ""}
fileAttachments will not yet produce the Notification Attachment. This functionality is coming soon.

JSON parsers are available for most programming languages. Your web service endpoint should parse the above message. After parsing the message, you can perform whatever logic you desire using the properties of the message.

Everbridge Configuration

Once the web service endpoint is working as described, you can configure the service in your Everbridge settings:

1. Select **Organization** >**Publishing Options** >**Web Posting** in the Everbridge web interface.
2. Click **Add** on the right-hand side under Web Posting Settings.
3. Input the following values:
   a. **URL**: The URL to which you want to POST an Everbridge Notification. The URL must be accessible via the Internet.
   b. **Display Name**: The name this URL POST should have in the Everbridge UI when creating a Notification.

   c. **Username**: IF the URL requires HTTP BASIC Authentication, the username for the URL.
   d. **Password**: IF the URL requires HTTP BASIC Authentication, the password for the URL.
4. Click **Save**.

Having followed these steps, you will see the value you set in "Display Name" when you select the **Web Posting** checkbox during Notification creation. Selecting the option will send a message to your web service.

Stopping or Expiring a Web Posting Notification

Customers using the **Web Posting Notification** feature currently have two options to stop or expire a Notification:

- Develop logic on the Customer Web Service to remove or replace a Notification based on your own business requirements (for example, elapsed time, updated HTTP POST, and so forth).
- Develop a web service call to Everbridge's REST API for Notification Configuration element in order to determine if the Notification Title is listed as an active Notification. This call can be executed at an interval of your choosing, but not recommended at less than 5 minutes from the time of receipt of the original HTTP POST.

CAP Channels

SAME codes

The **SAME Code** (Specific Area Message Encoding code) is a NOAA-provided code that extends the 5-digit FIPS code to 6-digits by enabling the first digit (left-most) to be used to identify a sub-geographical area in a county.

The SAME code value must be 6-digits; for example, 006037. The current list of SAME codes is available at https://www.weather.gov/nwr/counties

An Organization must include at least one SAME code. Only agencies with permission to send messages to more than one county in a state will have more than one value in the list. If the list is populated with more than one SAME code, the administrator can sort the list as desired.

The Geographical Description enables the administrator to set a label for each code to assist other administrators with troubleshooting. Enter the SAME Code and its description, then click **Add** for each individual entry. If there are multiple SAME codes, the administrator can click the up or down arrows to re-sequence the list.

Lastly, if the Live mode key password is stored, the **Auto-Generated Codes** button becomes enabled. Clicking the button generates a pop-up warning that all existing SAME codes will be deleted. Instead, all the SAME codes based on the GetCOGProfile settings are auto-populated.

Sender Agency Name

Administrators can enter one or more Sender Agency names. Type the Sender Agency Name and click **Add**. If there are multiple Sender Agency names, the administrator can click the up or down arrows to resequence the list.

Defaults

The administrator can hide fields on the form, as needed. Initially, all fields are exposed to the user on the Notification form.

Clear the corresponding check box to hide a field. In addition, the administrator can select the **Default Values** for each field. This eliminates the possibility of the user entering incorrect values on the user form.

The **Urgency**, **Severity**, and **Certainty** fields cannot be hidden on the Notification form. These fields are dependent on the **Event Name** selected in the Notification.

IPAWS

- IPAWS (Integrated Public Alert and Warning System) is a planned multi-agency emergency population warning system in the United States, hosted by FEMA. The channels are available to agencies with valid COG IDs. The agencies can send messages to the public via mobile phones, radio, and television.
- Wireless Emergency Alerts (WEA)
- Emergency Alert System (EAS)
- COG-to-COG (CAPEXCH)
- CAP RSS

To fill in the fields on this page, click **Choose File** for the Production Certificate or the Test Certificate. Then, double-click the file. Next, type the COG ID as provided to you by FEMA, type a COG ID Alias, and click **Save**. Repeat this process for the other Certificate.

Optionally, click the checkbox to save the credentials so they do not have to be entered when sending. If selected, fill in the **Private Key** and **Keystore Password**. Enter a **Launch Passcode** (minimum of 8 characters). When the credentials and Launch Passcode are saved, the user will be prompted to enter the Launch Passcode on every page that credentials are prompted to enter:

- IPAWS Send Notification page
- IPAWS Interactive Visibility widget on the Universe page
- Get COG Profile

> **NOTE:** When sending to the publishing option, you do not select a list of recipients, and the message recipients cannot confirm receipt or reply.

After the third time of incorrectly entering the Launch Passcode, the user can enter the Private Key and Keystore Password instead, or, for security reasons (in case the user account is compromised), wait 60 minutes to enter the correct Launch Passcode.

When needed, click **Get COG profile** to upload the Production or Test certificate. The **Keystore Passcode** dialog appears. Fill in the **Private Key** and **Keystore Password**, then click **OK**. The system retrieves the COG Profile, displaying the information. Click **OK** or **Print**, then **OK**. The application converts all fields to read-only format and stores the three entries as one record for the Organization. The page displays the audit information: time stamp and full name of the user who last updated the content of this page. This COG “common name” value that FEMA sends in the email to alerting authorities is not currently needed when sending Notifications.

The current format of the COG Alias is **IPAWSOPEN{COGID}**. You will receive the COG ID in an email from FEMA when you are granted credentials to send messages.

For more information about IPAWS, see the Everbridge IPAWS User Guide.

Alertus

The **Alertus Profile** provides a way for personnel to relay important emergency alerts through Alertus, an Everbridge Partner providing desktop alerts, alert beacons, and digital signage.

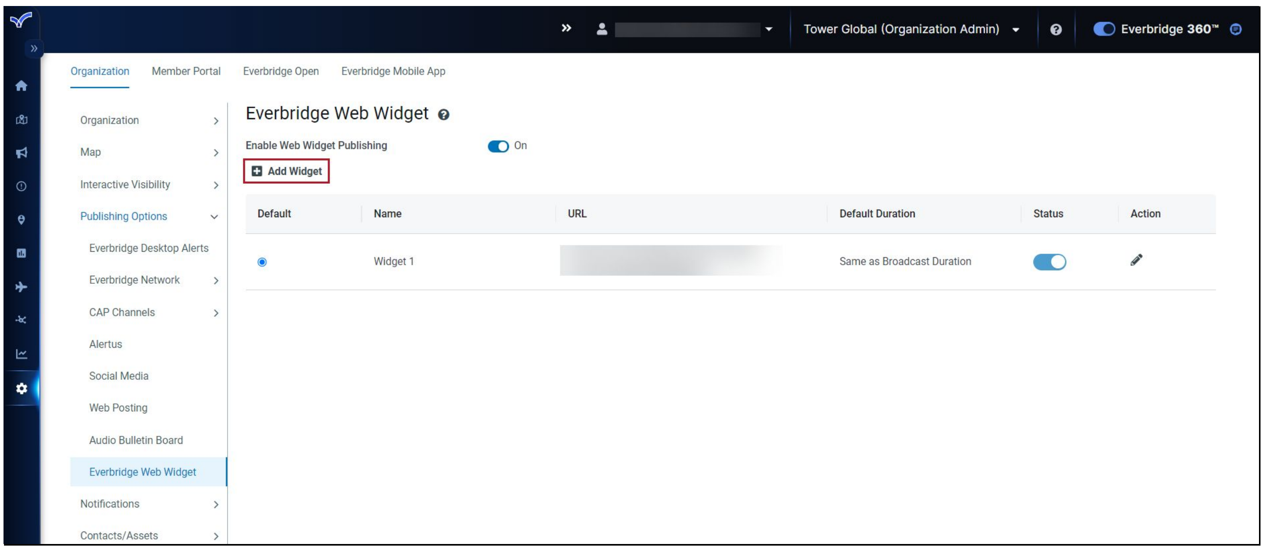
On the Alertus side, there are steps you need to take. From Alertus, refer to the Alertus - Everbridge Integration document for detailed instructions. The document explains how to:

- Allow the Everbridge Mass Notification application to communicate with the Alertus Server.
- Make a required configuration change to the Alertus Server.
- Create one or more Alert Services that launch a Notification in Everbridge Suite.

Everbridge Web Widget

Users can send a Notification to their designated website by configuring an Everbridge Web Widget URL. Widgets can be configured from **Settings** > **Organization** > **Publishing** > **Everbridge Web Widget** and toggling on the **Enable Web Widget Publishing** option.

Once enabled, you can copy the Web Widget URL and embed it in your website. An Organization can create up to five Web Widgets, and any of these widgets can be used as a publishing option for Notifications or Incidents.



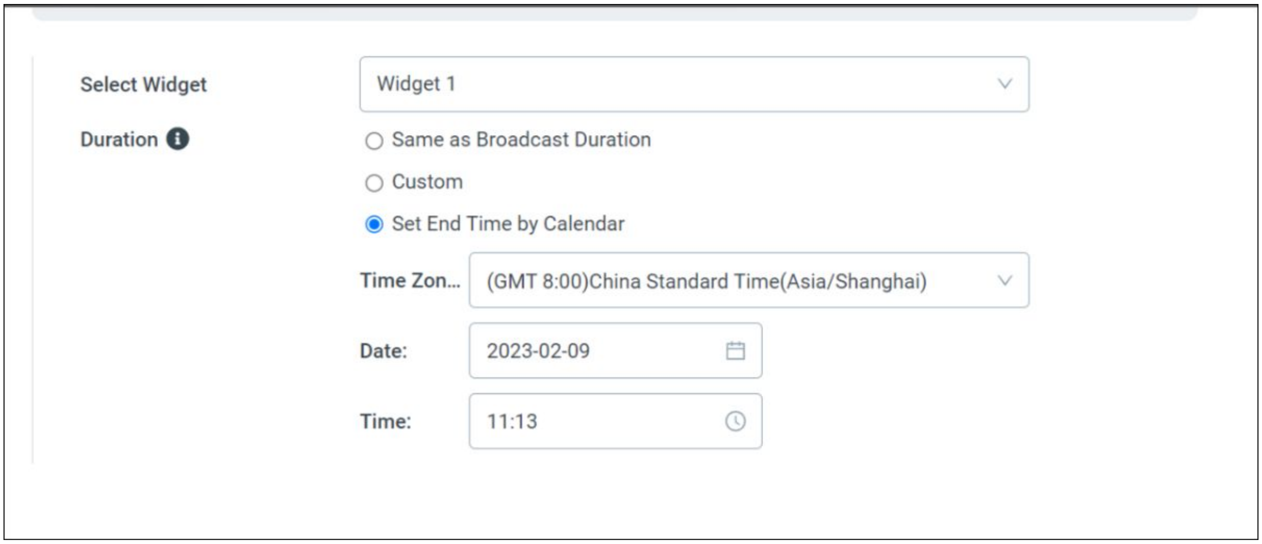
NOTE: Though multiple Web Widgets can be configured, only **one** can be chosen within a Notification or Notification Template.

You can configure a pre-selected default duration, which can be the same as the Broadcast Duration or a Custom duration by selecting from the drop-down list:

- 15 Minutes
- 30 Minutes
- 60 Minutes
- 1 Day (24 Hours)
- 3 Days (72 Hours)
- 1 Week (7 Days)
- 2 Weeks (14 Days)
- 1 Month (30 Days)
- 2 Months (60 Days)
- 3 Months (90 Days)
- 6 Months (180 Days

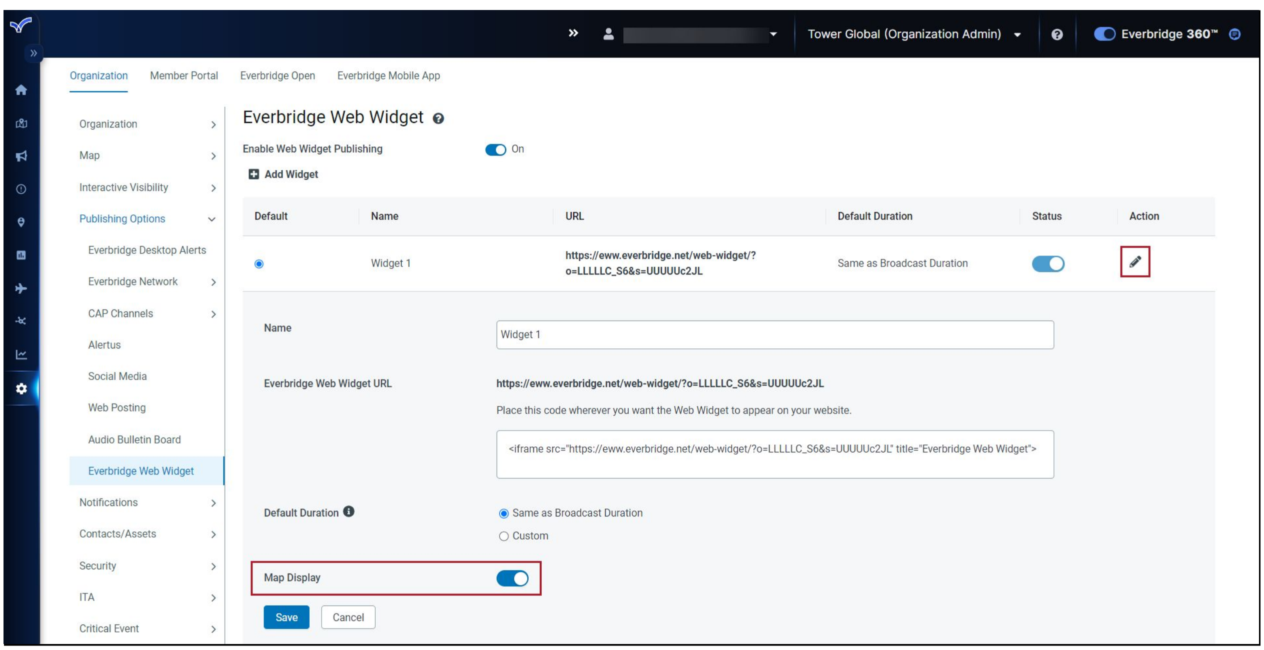
- 9 Months (270 Days)
- 1 Year (365 Days)

When launching a Notification, you can define the duration via the Web Widget by specifying the date and time until when the message should be broadcasted.



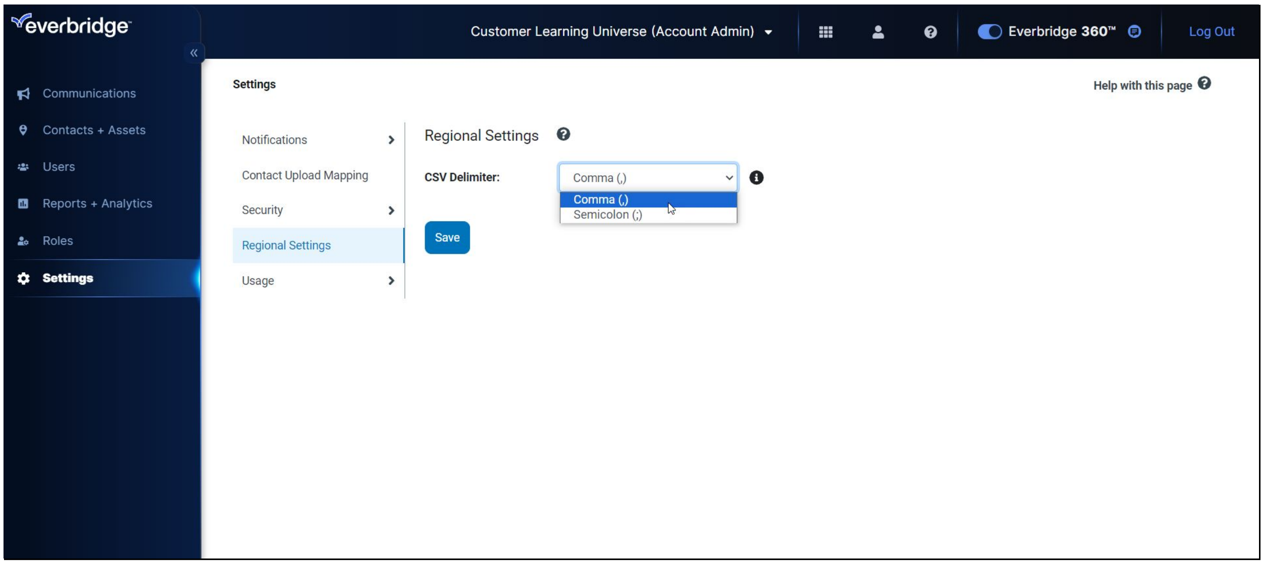
Enable or Disable the Map

Users can enable or disable the Map for each widget by clicking the Pencil icon. From there, toggling the **Map Display** option **On** or **Off** will enable or disable the Map for that widget.



Regional Settings

Regional Settings can be configured at the Account level from **Settings** > **Regional Settings**.



Select one of the following from the CSV Delimiter field from the drop-down list, then click **Save**. These settings apply to all Secure FTP uploads:

- Comma (,)
- Semicolon (;)

The comma delimiter applies to all uploads and downloads of CSV files in the Manager Portal.

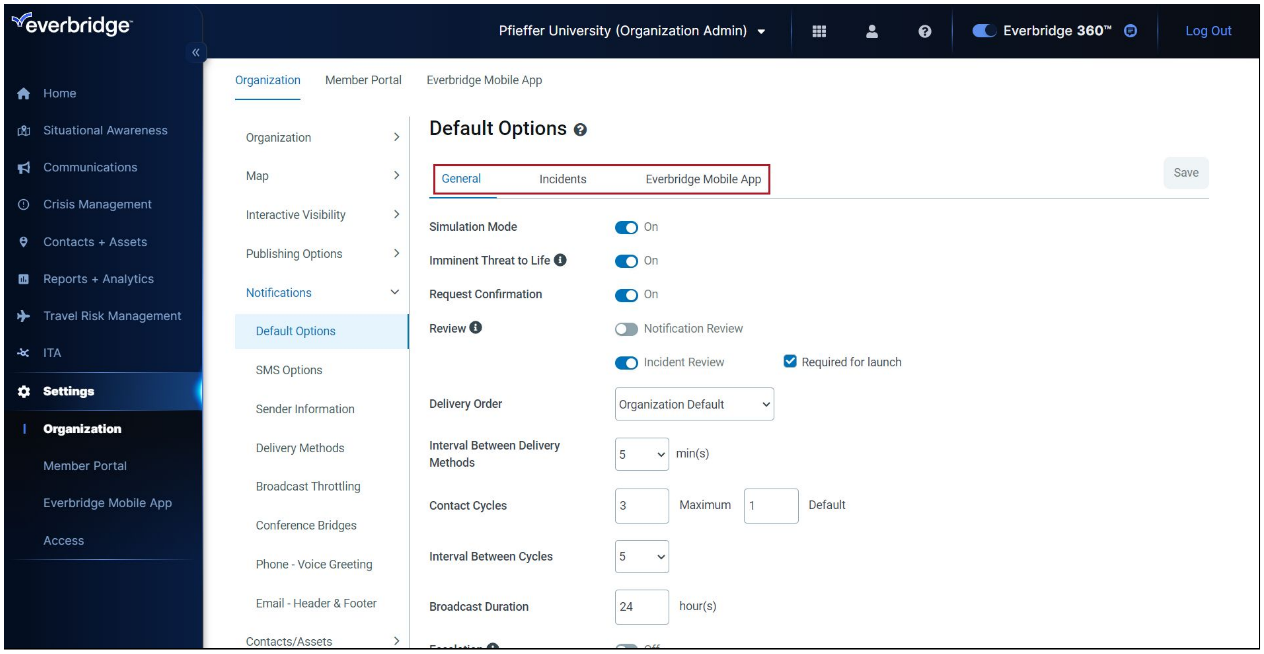
NOTE: A user can set regional settings from their Profile, which takes precedence over the Account or Organization-level settings.

Notification Settings

The Notifications Settings allow direct configuration for many default options within an Account or Organization. Configuring the most commonly used settings as the default options reduces the chances of human error while sending a Notification.

Organization-Level Notification Default Options

Set default Notification options for an Organization under **Notifications > Default Options.** There are three subtabs: General (for Notifications), Incidents, and Everbridge Mobile App.



General

Enter the default settings for the options available. When you send a Notification, you can change these settings if needed.

- **Simulation Mode** -Toggle on to enable users to practice sending Notifications and Incidents without notifying any Organization contacts. To send a Notification or Incident in Simulation Mode, users must turn off the "Go Live" toggle in the upper-right of the screen when drafting a new Notification.
    - Account Administrators (or Organization Admins) can set a user's permission to "**Restrict to simulation mode only**" for Notifications and Incidents separately. This will allow that user to only send simulated Notifications or Incidents. These settings can be configured in under **Access** > **Roles.**
- **Imminent Threat to Life** - Toggle on if your Organization uses Life Safety Notifications.
- **Notification Language** - Includes the language-appropriate text or voice prompts in each message. The Language setting is also used to convert your message text into an audio message for Notifications sent to voice path. Your users can select another language when preparing a new Notification.

- **Request Confirmation** - Request a confirmation of receipt from message recipients. For example, in a Notification sent to an email address, Everbridge includes a hyperlink for the users to confirm receipt of the message. In a voice message, users are prompted to press a key. The **Notification Report** reflects who confirmed receipt of your Notification.
  - Everbridge recommends that this setting always be turned on.
- **Review** - Enable or disable the Review step for Incidents or Notifications, and specify if it's required for launch.
- **Voicemail Preference** - Instruct Everbridge Suite how to behave if it encounters voice mail when attempting to deliver a voice Notification. You can select whether to:
  - End the call (**No Message**)
  - Leave a message (**Message Only**)
  - Leave a message along with call-back information to confirm receipt (**Message with Confirmation**)
- **Broadcast Cycles** - Sets the number of times Everbridge Suite should attempt to notify contacts.
  - In **Maximum**, enter the highest number of cycles your users can use.
  - In **Default,** enter a default value for all new Notifications, which users can change this value before they send the Notification.
    - For example, if you send a Notification to contacts who have four devices in their contact record and the Broadcast Cycle is set to **2**, then Everbridge Suite attempts to send the Notification twice to all devices.
- **Broadcast Duration** - Controls how long Everbridge Suite will attempt to notify your contacts and how long contacts have to confirm receipt of a Notification. Ensure the duration is long enough to send all of the messages. If you have a high number of contacts to whom to send messages and the duration is too short, the Notification might not be delivered to all contacts. Everbridge recommends a duration of 12-24 hours.
- **Escalation** - Allows users to define an escalation policy within a Notification under Notifications.
- **Custom Email/EMA Message** - Allows your users to include a separate message for email Notifications using a rich text formatting tool. Users can also use a separate plain text message for SMS text, fax, pagers, and text-to-speech.
  - **Always Use New Text Editor** - Selecting this will set the **New Text Editor** as the default option when using Mass Notification, Message, and Incident templates that were created before the Text Editor upgrade was released without needing to manually update each template.
- **Follow-Up/Update/Close: Include Previous Email Message** - Enable this to include the content from the previous message in a Follow-Up or Update to an Incident or Notification. This provides clear continuity of sequential

updates to an Incident for Contacts that leverage the Email delivery method. This feature applies to the following:
  - Send Update/Close to Incident
  - Send Follow Up to a Notification in an Incident
  - Send Follow Up to a Notification (in standalone Notifications)
  - Send Follow Up to an Incident Notification within a Scenario
- The previous message can be carried over only if the previous notification contains one or more of the following delivery methods:
  - Email Address 1 to Email Address 5
  - Plain Text Email - 1 Way
  - Plain Text Email - 2 Way
- **Attachment** - When an attachment size is more than 2 MB, the attachment file will be sent as attachment link in the Notification footer so that the recipient will have a link to download and view the attached files. You can set the number of days before the link expires.
- **Voice Delivery PIN** - Ensures your Notifications sent to a phone path are only heard by an authorized recipient. Select the checkbox and enter a PIN (4-10 digits). Distribute the PIN to your contacts before sending a voice Notification. When you recipients receive a voice call, they are prompted to enter the PIN before Everbridge Suite plays the message. Your message senders can disable this option when preparing a Notification if they do not want message recipients prompted for a PIN code.
- **Interval Between Cycles** - Controls how long the system waits before trying the next cycle. Everbridge recommends an interval of 10 minutes between cycles.
- **Interval Between Delivery Methods** - Controls how long the system waits before moving on to the next delivery method for a contact. For example, if the contact has four delivery methods, then this is the length of time (in minutes) the system waits before sending the Notification to the next delivery method. If the contact confirms one path, then the system does not attempt a Notification to the subsequent paths. Everbridge recommends a three-minute interval between methods.
- **Delivery Order** - Select the order of the delivery methods used for the Notification.
  - **Account Default** - The order specified in **Settings > Notifications > Delivery Methods**. This setting overrides the delivery method order specified in the contact record.
  - **Organization Default** - The order specified in **Settings > Organization > Notifications > Delivery Methods**. This option overrides the delivery method order specified in the contact record. Everbridge recommends this option as the delivery order.
  - **Contact Preferred** -The order specified in each contact's record.

- **One-Time Custom** - Define the delivery method order for this single Notification; this option overrides all other delivery method orders.

NOTE: The language setting does not translate the text. You must enter the text in the correct language.

Incidents

- **Scenario Manager** - Toggle on for Incident Management.
- **Exercise Mode** - Displays the Exercise Mode in Incident Management. When toggled on, the word **DRILL** is prepended to the message title and message text. Also, when Exercise Mode is on, you can only use Test mode for IPAWS, and live mode is disabled. If you are using Crisis Management, the checkbox is automatically enabled and you cannot disable it. If you are using Incident Communications, you can select or clear the checkbox.
- **Incident Chat** - Creates and uses a chat in your Incident Notifications.
- **Enforce Privacy** - Limits your delivery method to only the Everbridge Mobile App. Instead of the Notification subject, it displays "New private Notification".
- **Escalation** - Allow users to define an escalation policy within a Notification under Incidents.
- **Contact Batching** - Selecting the Incident Management checkbox enables messages to be sent to contacts in batches until the number of responses is met or the broadcast duration ends.
- **Send by Phone** - Allows your users to launch Notifications by phone for Incident Management.
- **Operator Confirmation** - Enables operators to confirm on behalf of Notification contacts.
- **PIN Verification** - Requires the sender to provide a 4-8 digit code before they send the Notification directly through the website or Everbridge Mobile App. This does not apply to Notifications sent through REST APIs or other automated processes. Administrators can add up to 10 Verification PINs for their Organization.

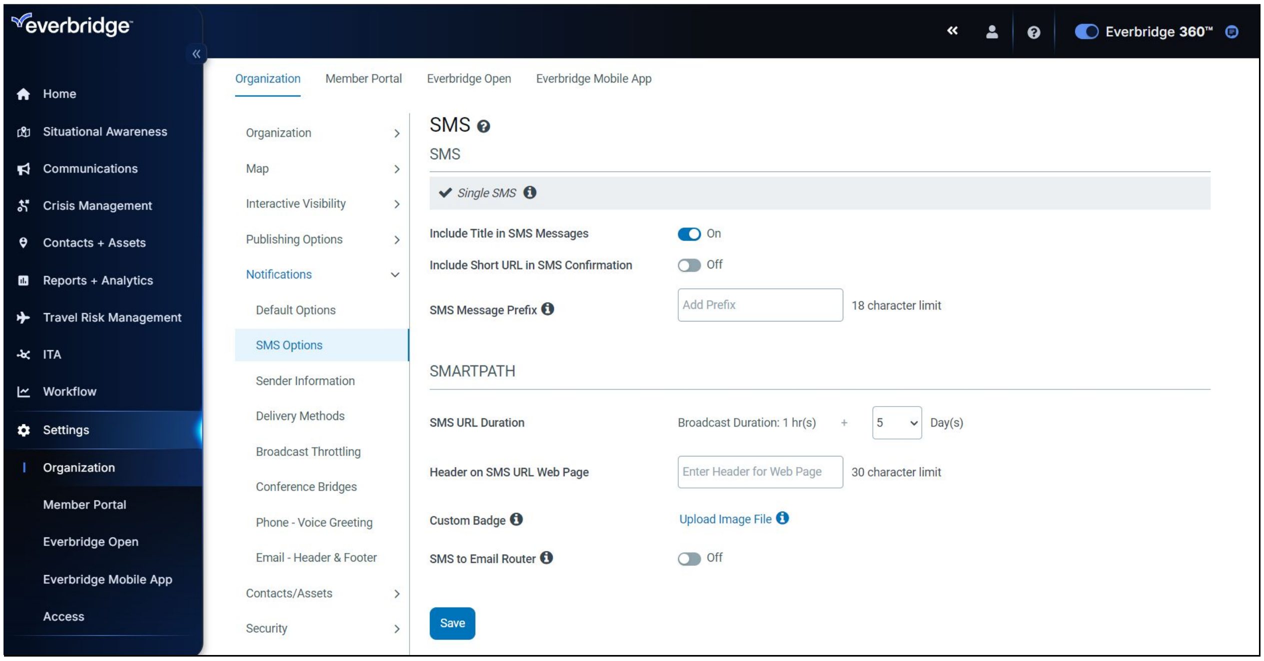
Everbridge Mobile App

- **Message Sharing** - Allows your contacts to share Notifications you send with their extended network. Optionally, toggle default Notification sharing OFF.
- **Send Secure Push Messages**
    - **Contacts** - Sends Notifications to other devices like highway signs and reader boards. This is listed in the Everbridge Mobile Safety App settings because Everbridge uses the push alert delivery method to send the data.

- **Secure Messaging apps** - Sends secure push messages to Secure Messaging Apps.

SMS Options

Set options for delivering SMS messages to recipients.



SMS

- **Include Title in SMS Messages** - Enable or disable the use of the message Title in your SMS messages so that when disabled, SMS messages will not receive the Title text.
- **Include Short URL in SMS Message** - Enable a short URL link in SMS Notifications. When this option is selected, and Confirm is also selected, the recipient receives the messages. "Either type YES or tap the link to confirm the message".
- **SMS Message Prefix** - For Custom SMS messages, you can prepend a prefix to the messages so that your recipients know what Organization is sending the message.

SmartPath

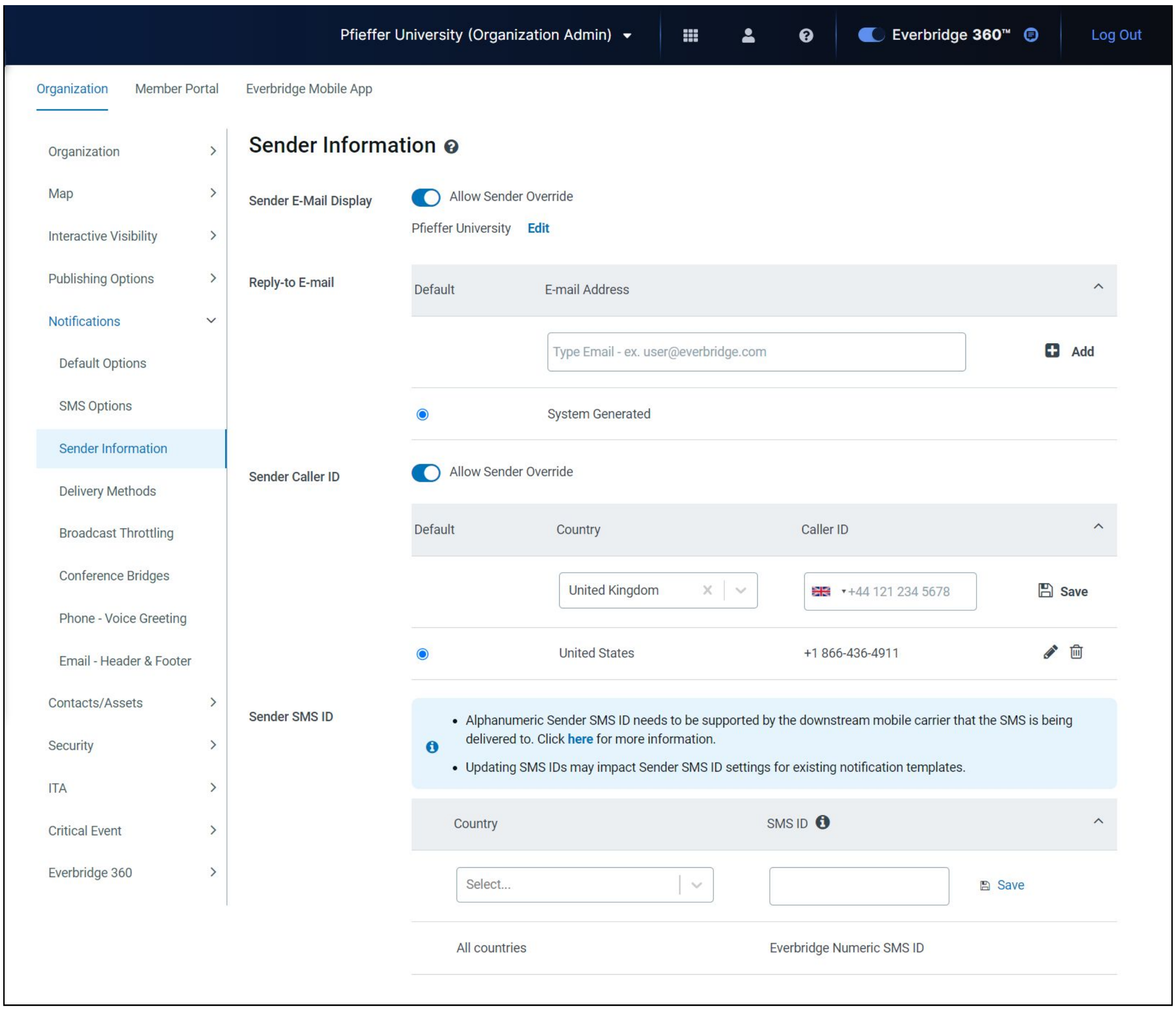
- **SMS URL Duration** - Enter the Broadcast Duration plus a number of days (0-5).
- **Header on SMS URL Web Page** - Enter up to a 30-character header.
- **Custom Badge** - This image displays on the web page. Click **Upload Image File** to upload a PNG or JPG.

- **SMS to Email Router** - If an Organization is enabled for the SMS to Email Router feature and the Notification in question is not set to **High Priority**, then enabling the SMS to Email Router feature skips the SMS delivery path in lieu of an email delivery path when an email delivery path (Email [1-5]) is defined at the Notification level and for the individual contact.

Organization-Level Sender Information

The Organization-level **Sender Information** page is used for Notifications sent via email and phone delivery methods from an Organization. Use these features to identify yourself as the message sender to your Notification recipients, allowing you to obtain better confirmation rates.

Sender Information is configured from **Settings** > **Organization** > **Notifications** > **Sender Information**.



Click **Save** after configuring your Sender Information:

- **Allow Sender Override** - Toggle on if you want the Notification sender to edit the sender's email information when preparing a new Notification.

- **Sender Email Display** - Displays a sender name that your message recipients see in the **From** field when your email Notification arrives in their email inboxes from this Organization.
    - Set the **Sender Email Display** to a value that motivates recipients to open your email as soon as possible. For example, "Security Desk", "City Police Department", or "Office of the President". To set the Sender Email Display, click **Edit**, type the identifier, and click **Save**.
        - It is recommended not to use an email address for the value of this field as its purpose is to represent a reader-friendly name, rather than an address. Additionally, using an email address may be a red flag for some downstream spam detection filters.
- **Reply-to Email** - Displays an email address your message recipients can reply to, if needed.
- **Sender Caller ID** - Use this option for Notifications sent to voice paths to display as the Caller ID when the recipient receives the call.
    - **Default** - If you add more than one Caller ID, then choose a default Caller ID. If a call is placed to a country that does not have a defined Caller ID, then Everbridge Suite uses the default Caller ID.
    - **Country** - From the menu, select the country corresponding to the Caller ID.
    - **Caller ID** - Enter the full phone number corresponding to the selected Country. For example, if you select **United Kingdom**, then the Caller ID must be a valid UK phone number without the “44” country code. NOTE: When setting a Caller ID, keep the following in mind:
        - The Caller ID should be a valid phone number that can be called back if needed. Invalid numbers (for example, 555-555-5555, 123-456-7890) can be rejected by telephone service providers and result in your Notification not reaching your recipients.
        - The Caller ID should include the local number, without the specific 1-to-4-digit country code. (Everbridge Suite adds the international codes automatically when sending the Notification.)
        - The Caller ID value selected as Default is used when sending Notifications to any country not listed.
    - **Sender SMS ID** - Use this option for Notifications sent to SMS paths to display as the Sender SMS ID when the recipient receives the message. Custom SMS IDs will only work when supported by the local carrier. Updating SMS IDs may impact Sender SMS ID settings for existing Notification templates.
        - **Country** - From the menu, select the country corresponding to the SMS ID.
        - **SMS ID** - From the menu, enter the ID and click Save. This ID must 3-11 characters in length. The Sender SMS ID for all countries (except the United Arab Emirates and Saudi Arabia) can begin with digits (0-9). The dash character (-) is not allowed.

- **Permission** - Select this checkbox to allow the Notification sender to edit the **Sender Email Address** and **Sender Call ID** settings.

International Limitations

An increasing number of countries are enforcing strict regulations against calls originating from outside their borders using domestic caller IDs in a practice known as "spoofing." It's important to be aware that calls initiated from the Everbridge platform may appear to be originating from the US or Europe, depending on your platform login location. In regions where these calls are accepted outside the US or Europe, they will be recognized as incoming "International" calls, and therefore, an "outside" country caller ID is expected. If the system's caller ID is set to appear "local," voice providers may block the call because they can identify it as an international call with a spoofed local caller ID.

For instance, if you are making a call to a recipient with a Luxembourg phone number (+352), it's crucial to configure a non-Luxembourg caller ID, such as a +1 (US) phone number. In most cases, the specific country of the caller ID is not critical, as long as it does not match the recipient's country. Neglecting this practice could result in voice calls being restricted or not reaching their intended recipients in the respective country.

> **NOTE:** For more details on voice call limitations and anomalies, see the Support Center.

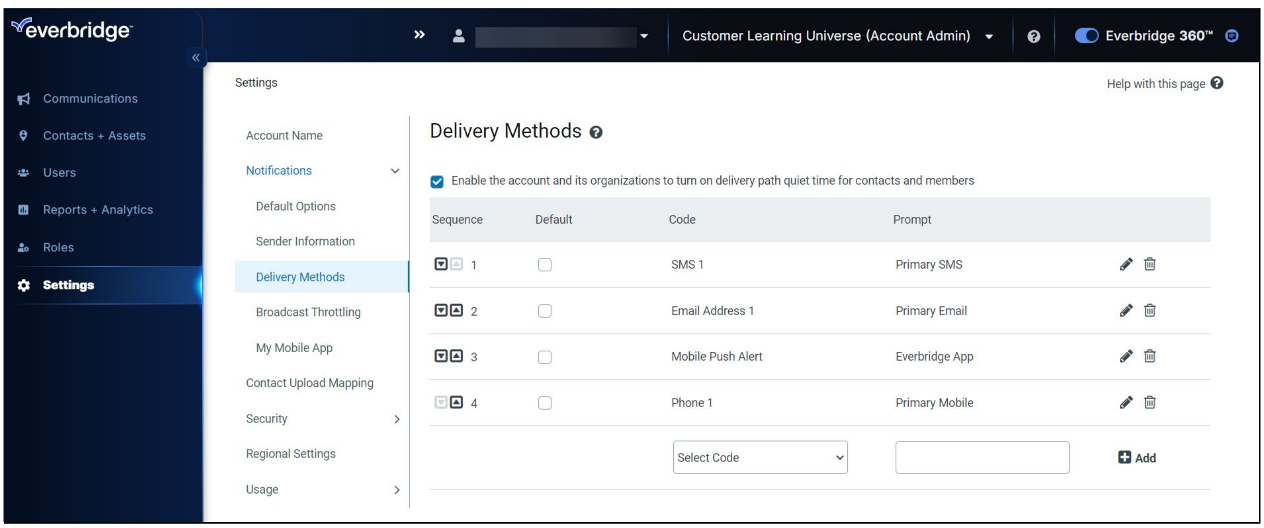
Delivery Methods

Delivery Methods specify how contacts can receive Notifications, including options like Email and SMS. These methods can be configured at both the Account Level (for Notifications sent from the parent Account) or at the Organization Level (for Notifications sent from its child Organizations).

Account Level

When configuring Delivery Methods from the Account Level (**Settings** > **Notifications** > **Delivery Methods**), Account Administrators can:

- Select any of the available Delivery Methods.
- Remove Delivery Methods.
- Assign a custom name for each Delivery Method so your users can select the correct one for their Notifications.
- Enable members to turn Delivery Methods on or off and specify quiet periods. For example, if a member sets a quiet time for 8:00 am-5:00 pm, all Delivery Methods will be turned off until 5:00 pm.

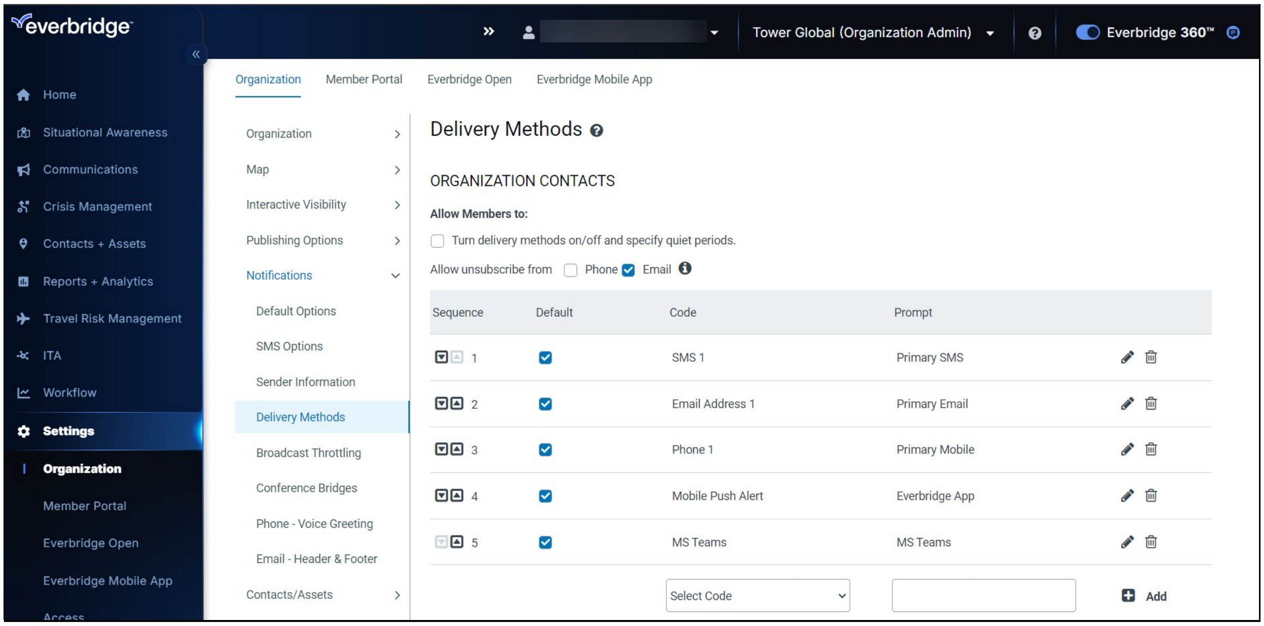


Organization Level

When configuring Delivery Methods from the Organization Level (**Settings** > **Organization** > **Notifications** > **Delivery Methods**), administrators can:

- Select any of the available Delivery Methods.
- Remove Delivery Methods.
- Assign a custom name for each Delivery Method so your users can select the correct one for their Notifications.

- If enabled at the Account Level, allow members to turn Delivery Methods on or off and specify quiet periods for the Organization.
- Allow recipients to unsubscribe from messages when they receive them via Email or SMS message.



Delivery Method Descriptions and Recipient Confirmation

The table below explains the various Delivery Methods and the different types of input required for a contact.

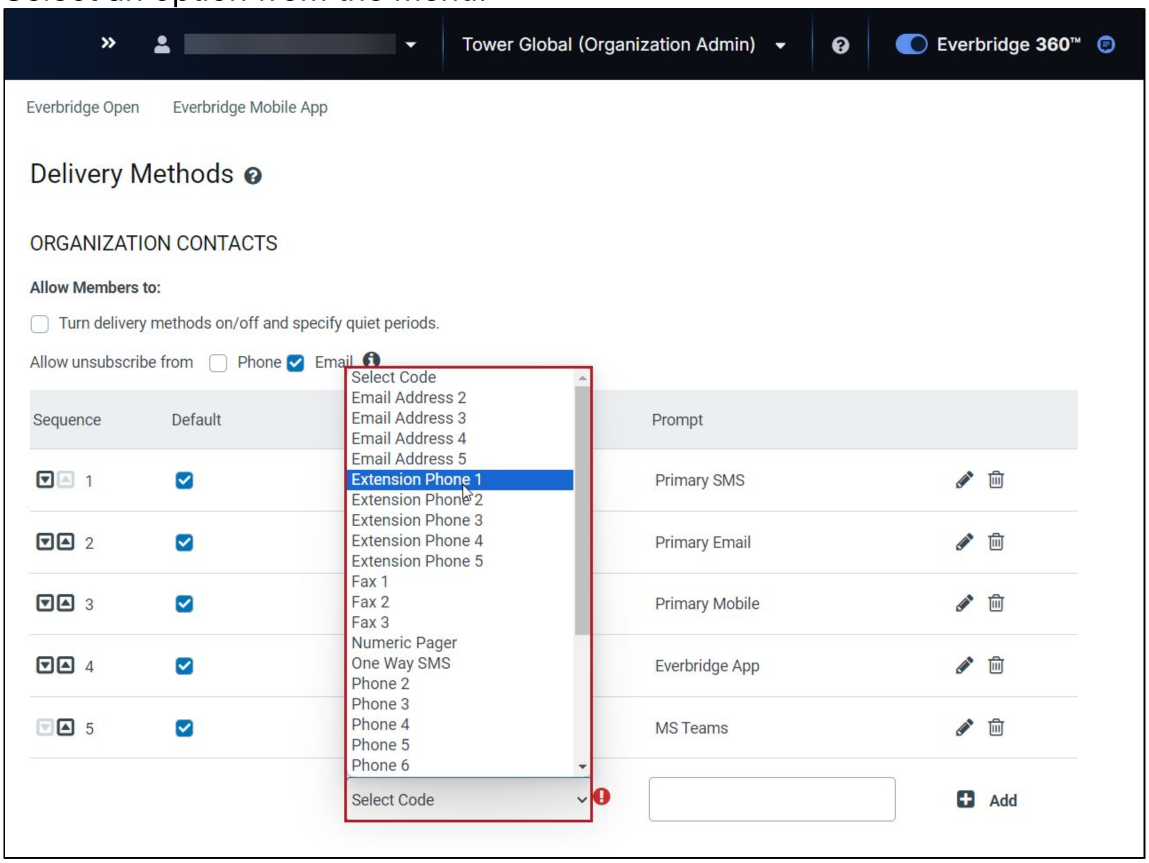
Delivery Method	Recipient's Message Format	Recipient Confirmation
Email Address	Content of Body field or Email Only field in the Notification Form.	Select **click here to acknowledge receipt of this message**.
Extension Phone #	Audio message.	• Press 1 after listening to the message. • Use the callback information to dial the phone number and enter the message ID.
Fax #	Content of the Body field in the Notification form.	Call the phone number and type the PIN provided on the fax.

Mobile Push Alert	The content of the Body field is displayed in the message field and the content of the Email Only field is an attachment to the message.	Use the REPLY feature in the app.
Numeric Pager	Audio message only.	Call the phone number provided and enter the PIN.
Everbridge Mobile App	Content of the Body as a push Notification. Content and Body in the Notification.	N/A
One Way SMS	Content of the Body field in the Notification.	Call the phone number provided and enter the message ID.
Phone	Audio message only.	• Press 1 after listening to the message. • Use the callback information to dial phone number and enter the message ID.
Plain Text Email 1-Way	Content of the Body field in the Notification.	Call the phone number provided and enter the message ID.
Plain Text Email 2-Way	Content of the Body field in the Notification.	Use the REPLY feature in the device.
SMS	Content of the Body field in the Notification.	Use the device’s REPLY feature.
TAP Pager	Content of the Body field in the Notification.	Call the phone number provided and enter the message ID.
TTY	Content of the Body field in the Notification.	Call the phone number provided and enter the message ID.
MS Teams	Includes the Message Title and Body field in the Notification. Does not support attachments or two-way communications.	Confirm or answer polling questions using the included buttons.

Add a Delivery Method

To add a Delivery Method:

1. Click the **Select Code** menu at the bottom of the page
2. Select an option from the menu.



3. Type a prompt in the field next to the **Select Code** menu.
4. Click **Add**.

Configure Delivery Methods

Select from the following options to configure Delivery Methods:

1. Select the **DEFAULT** checkbox for the Delivery Methods you want pre-selected when a user creates a Notification.
   - The Notification sender can change the Delivery Methods for the Notification, but setting the defaults for the most common Delivery Methods saves time.
2. Select the appropriate checkbox to allow users to unsubscribe from phone and email delivery.
3. Define the sequence of the Delivery Methods by moving the Delivery Methods in the list.

4. Use the **Pencil** icon to edit the Prompt value or the Advanced Configuration of a Delivery Method.

Delete Delivery Method

To delete a Delivery Method, click the **Trash Bin**. The information is removed from the contact record, but the contact can add it again if needed.

To delete a Delivery Method using the CSV file, the specific field and all of its corresponding fields must be empty. If any field still has content, then no changes occur in the contact record.

Unsubscribe and Resubscribe Options

Your Notification recipients can opt out of receiving messages from your Organization. Everbridge unsubscribes by path value and Organization, not by contact, which means you must opt out of each delivery path separately.

- Unsubscribing via SMS does not affect the voice or email delivery paths.
- Unsubscribing via voice does not affect the SMS or email delivery paths.
- Unsubscribing via email does not affect the SMS or voice delivery paths.

SMS Unsubscribe and Resubscribe

When recipients of an Everbridge SMS Notification want to opt out of receiving SMS messages from your Organization, they can each send a keyword to an Everbridge SMS code.

To unsubscribe via SMS:

1. A recipient sends an SMS message containing one of the following keywords (in US English and spelled exactly as shown here):
    a. STOP
    b. END
    c. UNSUBSCRIBE
    d. QUIT
    e. CANCEL
    f. STOP ALL
2. Depending on the country and carrier used, your contacts might receive an auto-response informing them they have opted out and will not receive further messages from Everbridge Alerts. Not receiving an auto-response is not an indication of the unsubscribe process not working; your contacts are opted out even if they do not receive a return confirmation message.
3. If Everbridge Suite finds any of the keywords as the first word in the reply (from left to right), the system adds the phone number to the Everbridge unsubscribe list for your Organization.

> **NOTE:** The system treats a response as an unsubscribe request if someone replies with “Stopping at the data center on the way back to the office.” This is because the word “Stop” is in the first four positions of the SMS message received by Everbridge Suite. Avoid starting any response with the word “stop...” if they are not opting out. Also, Everbridge Suite treats a response as a request to unsubscribe if “stop” is preceded by blank spaces, for example “ stop” as long as the blank spaces are at the very beginning of the response. Everbridge

> Suite does not treat a response such as "I am going to stop at home before heading to the airport" as a request to unsubscribe because "stop" is not the first four characters of the message (reading from left to right).

4. The Administrator sends a subsequent Notification via SMS and Email, for example, to the same contact who has opted out. Everbridge Suite blocks the SMS message to the contact. However, the Email message is sent to the contact. The Administrator can view the call results for the contact under Notification History. The call result displays as "Not Attempted - Unsubscribed" for the SMS attempt on the Notification report.

   > **NOTE:** If the Administrator sends the Notification only via SMS, then the contact in the above example is aggregated under the UNREACHABLE category in the Notification Details. However, if other delivery methods were used for the Notification to the contact, they are listed under the appropriate confirmation status category.

5. The Administrator can view a list of all contacts who have requested to be opted out of SMS Notifications by selecting **Reports > Quick Reports > Unsubscribe Requests**.
6. Click **Download CSV**, and open the link after receiving the email for the CSV report.

Unsubscribe from all Organizations via SMS

Using STOP ALL allows recipients of Everbridge SMS Notifications to send a response to opt-out of receiving any SMS messages from all Organizations within Everbridge Suite. For example, a contact might receive Notifications from the Administrator and might also be opted into another Organization that uses Everbridge.

The recipient who sends STOP ALL (not case-sensitive) will not receive any SMS messages from Everbridge Suite and is listed on the Notification History page and Unsubscribe Requests quick report.

The STOP ALL keyword also blocks messages to contacts who have not received any SMS messages from Everbridge.

> **NOTE:** Using STOP ALL unsubscribes the given phone number from all Organizations regardless which Organization, if any, sent out a Notification recently to the given phone number. Even if the phone number does not

belong to any Organization in Everbridge Suite, STOP ALL adds the given phone number to the unsubscribe list. This means that in the future, if that phone number is added to an Organization's contact record for an SMS delivery path, then that contact will not receive any SMS messages until he or she re-subscribes.

STOP can also have similar effects as STOP ALL. If a contact receives an SMS from Everbridge and decides to unsubscribe, then that contact has up to 10 days from the date of the Notification's sent date to send a STOP request. If the STOP request is received during this time, then the STOP applies solely to the Organization that sent the last Notification to that contact. However, if the STOP is received after 10 days of any Notifications having been sent to that phone number, then Everbridge categorizes the STOP as a STOP ALL and the given phone number is unsubscribed from all Organizations.

- If two contacts are in the same Organization with the same phone number, and Contact 1 unsubscribes, regardless of using STOP or STOP ALL, then neither contact receives an SMS message.
- If two contacts are in different Organizations with the same phone number, and Contact 1 unsubscribes:
  - when using STOP within 10 days from when the Notification was sent, then Contact 2 in the other Organization receives the Notification SMS message, but Contact 1 does not.
  - when using STOP ALL, then neither contact receives a Notification SMS message. STOP ALL is a blanket unsubscribe regardless of Organization.

Resubscribe via SMS

To resubscribe via SMS:

1. Send an SMS message with the word `RESUME` to any of Everbridge’s SMS codes (see here.) The phone number is removed from the Unsubscribed list.
2. `RESUME` applies to all unsubscribed Organizations. There is no option to specify an Organization.

Voice Unsubscribe and Resubscribe

See **Organization Settings > Notifications > Delivery Methods > Allow unsubscribe from**, and ensure the **Phone** check box is selected. Select this check box to play the unsubscribe prompt at the end of all voice Notifications using the Phone [X] delivery paths.

Your recipient receives a phone call. After the message playback completes, the recipient can press 0 (zero) to unsubscribe.

To unsubscribe from a Voice Notification:

1. Your recipient presses 0 (zero) to unsubscribe from future Notifications.
2. Your recipient confirms the process.
3. To view a list of all contacts who have opted out of voice Notifications, select **Reports** > **Quick Reports** > **Unsubscribe Requests**.
4. Click **Download CSV** and open the link after receiving the email for the CSV report. The act of unsubscribing unsubscribes the given phone number from all of the Phone [X] delivery paths in your Organization. However, it does not affect SMS, email, or any other delivery path.

To resubscribe to Voice Notifications:

1. Contact the Everbridge Voice Resubscribe phone number.
2. Go through the resubscribe process as directed.

The resubscribe menu is available only in US English. There are no options to select which Organizations to which to resubscribe.

The resubscribe mechanism detects the caller's Caller ID and only allows resubscribing that particular number. This is for privacy reasons to ensure that only the individual who owns a given number can resubscribe that number.

The act of resubscribing resubscribes the contact to all of the Phone [X] delivery paths. However, it does not affect SMS, email, or any other delivery path.

Email Unsubscribe and Resubscribe

See **Organization Settings > Notifications > Delivery Methods > Allow unsubscribe from**, and ensure the Email check box is selected. Select this checkbox to display the default unsubscribe text at the bottom of all email Notifications using the Email [X] delivery path. See Email - Header & Footer for details about Default and Custom Unsubscribe.

The unsubscribe is only applied to Email [X] delivery paths; not to the Plain Text Email 1 Way or Plain Text 2 Way delivery paths.

The system-generated unsubscribe verbiage is language-specific based on the Notification's language.

Your recipient receives an email. The **System unsubscribe** (default or custom) link at the bottom of the email.

Unsubscribe

To unsubscribe from an Email Notification:

1. Your recipient clicks the link at the bottom of the email. The link leads to an unsubscribe page unique for the contact and Organization combination. The dialog is in the language of the Notification.
2. Your recipient selects the **I'm not a robot** check box.
3. Your recipient clicks **Yes, Unsubscribe**. A confirmation message is displayed.
4. To view a list of all contacts who have opted out of email Notifications, select **Reports > Quick Reports > Unsubscribe Requests**.
5. Click **Download CSV** and open the link after receiving the email for the CSV report.

The act of unsubscribing unsubscribes the given email address from all of the Email [X] delivery paths in your Organization. However, it does not affect SMS, voice, or any other delivery path.

Resubscribe

To resubscribe to Email Notifications:

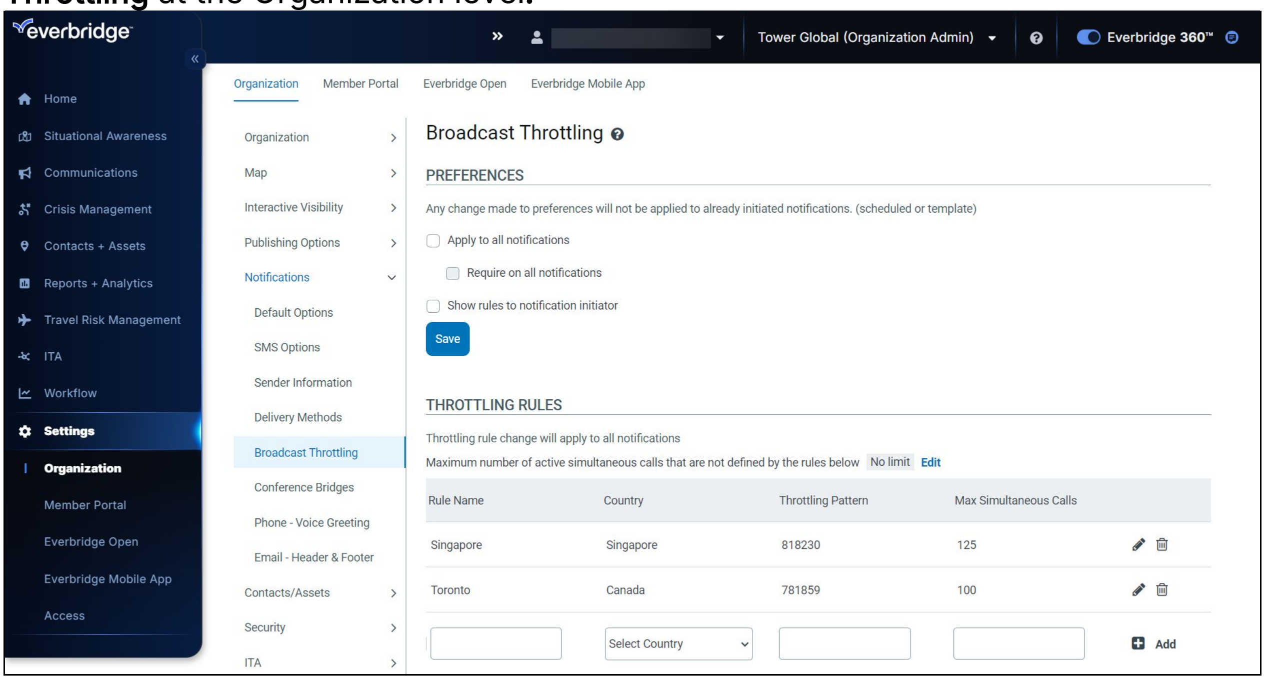
1. The contact goes to the **Everbridge Email Resubscribe** page.
2. Type the email address to resubscribe. (There is no email validation for ownership.) There are no options to select which Organizations to which to resubscribe; it applies to all unsubscribed Organizations. For security reasons, the names of Organizations are not displayed. If the user is not unsubscribed from any Organization, then the “You are not unsubscribed from any Organization” message displays with no **Subscribe** button.
3. Select the **I’m not a robot** check box.
4. Click **Check Address**.
5. Click **Subscribe**. The act of resubscribing resubscribes the contact to all of the Email [X] delivery paths. However, it does not affect SMS, voice, or any other delivery path.

Broadcast Throttling

When you start a Notification, Everbridge tries to deliver the message as quickly as possible. If you are sending phone calls, then it is possible that the system receiving the calls cannot handle all the phone calls simultaneously. For example, a Notification might place 200 calls to an office location with a PBX phone system that can only accept 125 calls at a time.

Use **Broadcast Throttling** to control the number of simultaneous phone calls made to your jurisdiction or to your locations. For example, if the PBX or the central office can handle only 125 calls, then you could set the maximum simultaneous phone calls to 100. In this case, the Notification is sent to the first 100 calls, and not to the entire 200. It does not send another call until one of the first 100 has ended.

Broadcast Throttling can be enabled from **Settings** > **Organization** > **Broadcast Throttling** at the Organization level.



To control the number of simultaneous calls, set up rules based on the dialed number. For example, the PBX at your office starts with the phone number 818230 and might only be able to handle 150 calls at a time. Define a rule to limit the maximum simultaneous calls to that PBX to 125.

You can have different rules for different locations. You can also have a default limit for calls that do not match any of the rules.

Define a Rule

To define a rule:

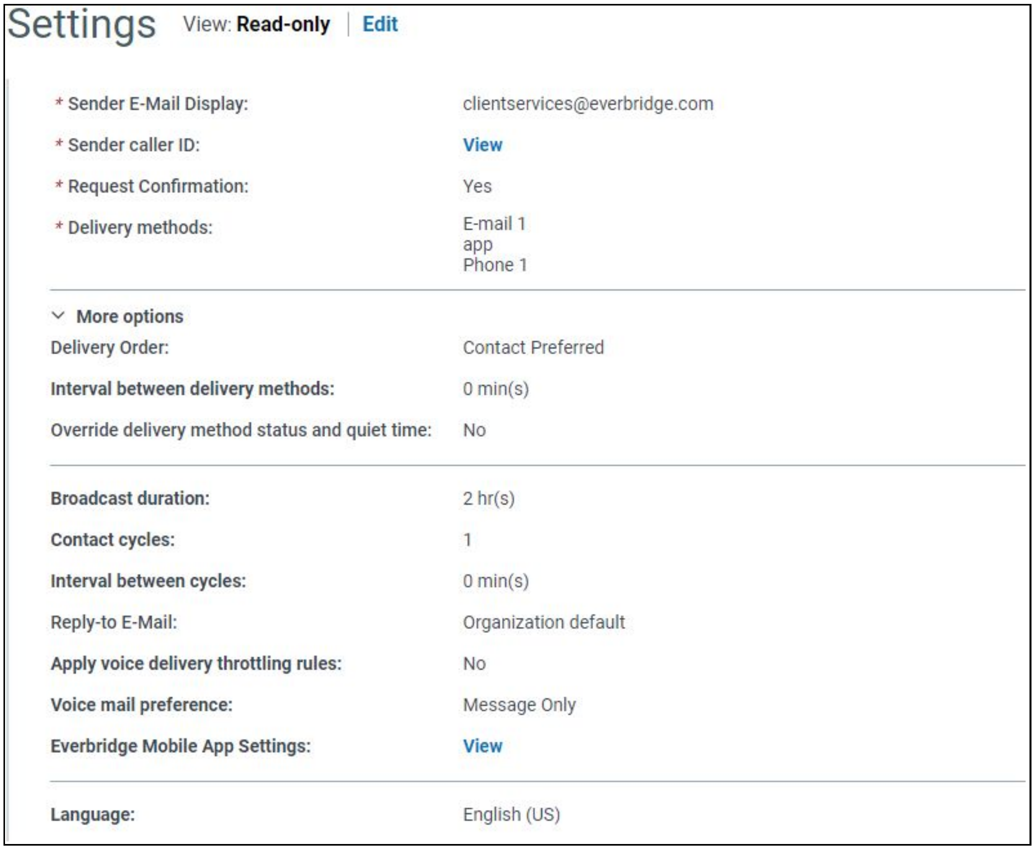
1. Type a Rule Name.
2. Select the country in which the dialed numbers are located.
3. Type the Throttling Pattern for this rule. If the phone number to be dialed for the contact matches this pattern, the **starts with** rule will be used.
4. Click **Add**. Repeat this process for any additional rules.
5. When done, click **Save**.

You can set a maximum to use if the dialed number does not match any of the rules. By default, there is no limit to the number of simultaneous calls if a throttling rule is not matched. To set a maximum number of calls, click **Edit**. Type the maximum number of calls in the text box and click **Save**.

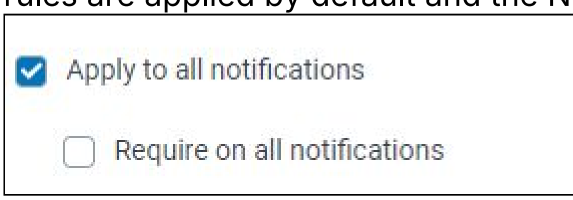
When you make changes to throttling rules, the new values are used the next time a Notification is sent, including any Notification templates and scheduled messages.

In the **Preferences** section of Broadcast Throttling, you can configure how a Notification uses throttling rules.

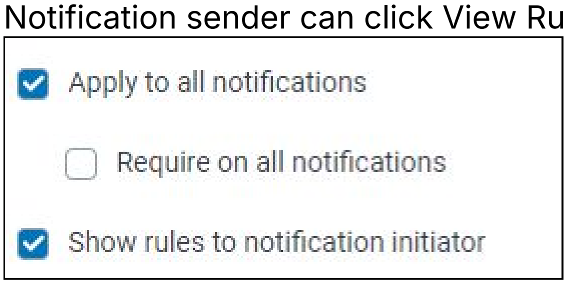
- If all the checkboxes are clear, then the throttling rules are not available to use in a Notification.



- If the **Apply to all Notifications** checkbox is selected, but the **Require on all Notifications** checkbox is clear, then the throttling rules are applied by default. However, the Notification sender can disable the throttling rules for a Notification by clearing the **Apply voice delivery throttling rules** checkbox.
- If the **Require on all Notifications** checkbox is selected, then the throttling rules are applied by default and the Notification sender cannot turn them off.



- If the **Show rules to Notification initiator** checkbox is selected, then the Notification sender can click View Rules to view the rules.



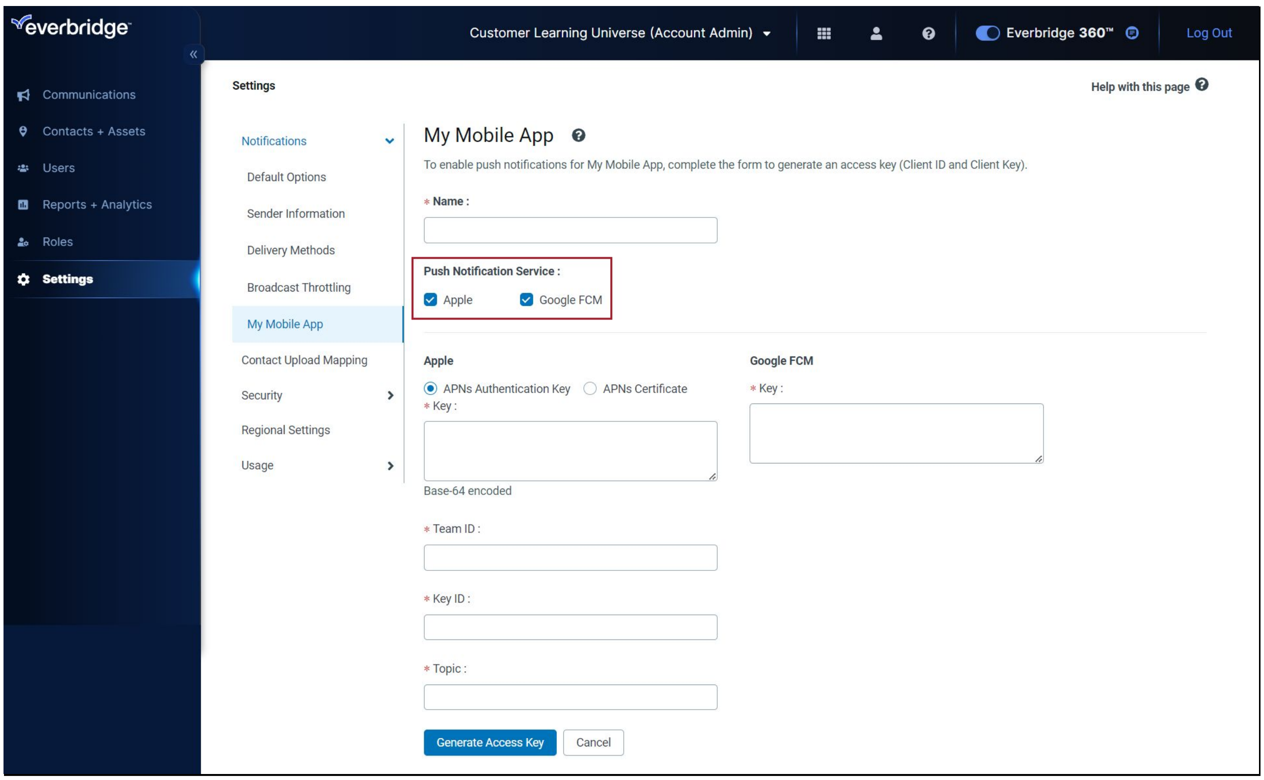
When you make changes to preferences, they apply to new Notifications. They do not affect any templates or scheduled messages you have already configured.

My Mobile App

Account Administrators who would prefer to use their own custom mobile app rather than the Everbridge Mobile App can configure its Notifications by going to **Account Settings** > **Notifications** > **My Mobile App**.

NOTE: This feature must have already been enabled for the account for this section to appear.

First, enter the mobile app's name and choose between the Push Notification Service(s) you'll want your account to use. This can be either **Apple**, **Google FCM**, or **both**.



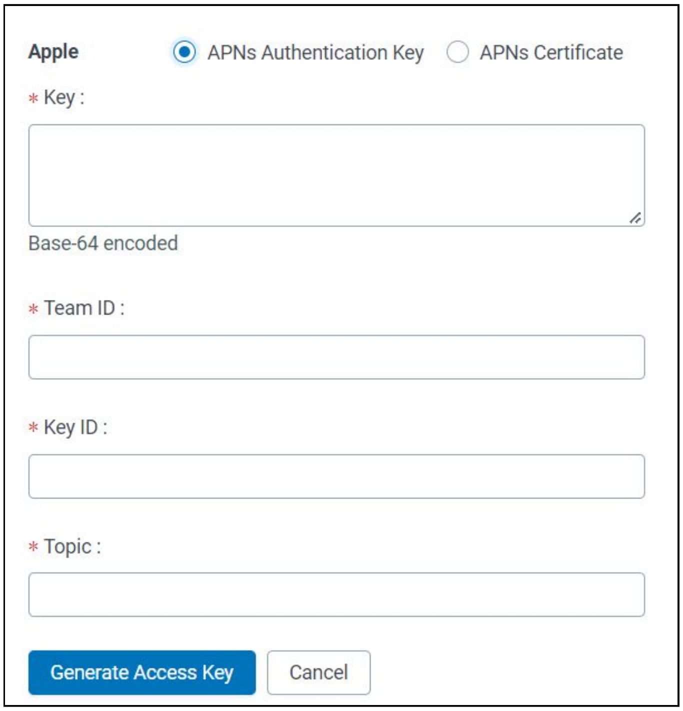
The next section will populate depending on which options were chosen above.

If **Apple** was selected, there are two additional options: **APNs Authentication Key** or **APNs Certificate**.

The **APNs Authentication Key** option fields will populate when selected:

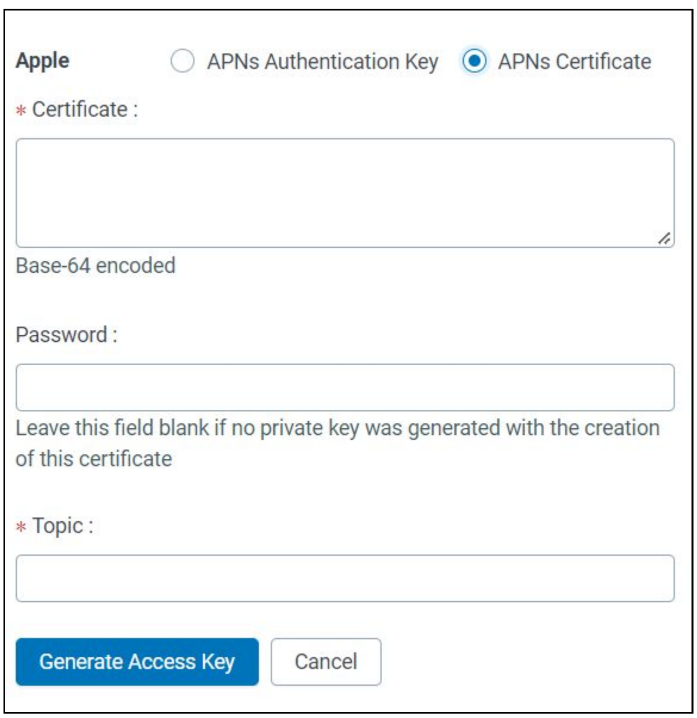
- Key
- Team ID

- Key ID
- Topic

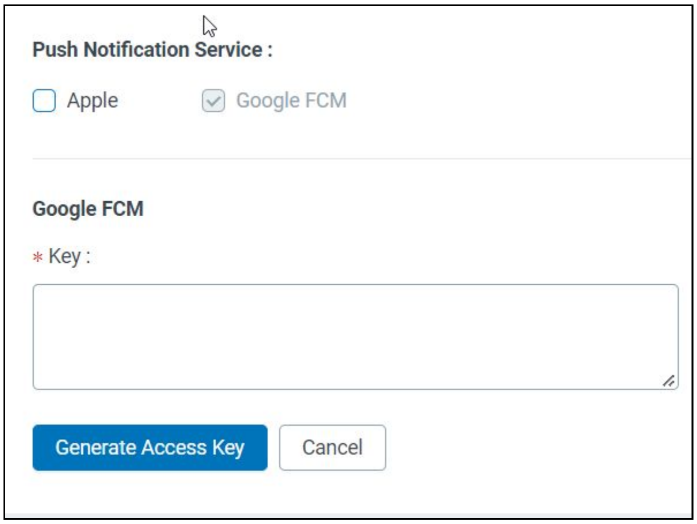


Choosing the **APNs Certificate** option will reveal the following fields:

- Certificate
- Password
- Topic



If you chose **Google FCM**, then only the **Key** field will appear.

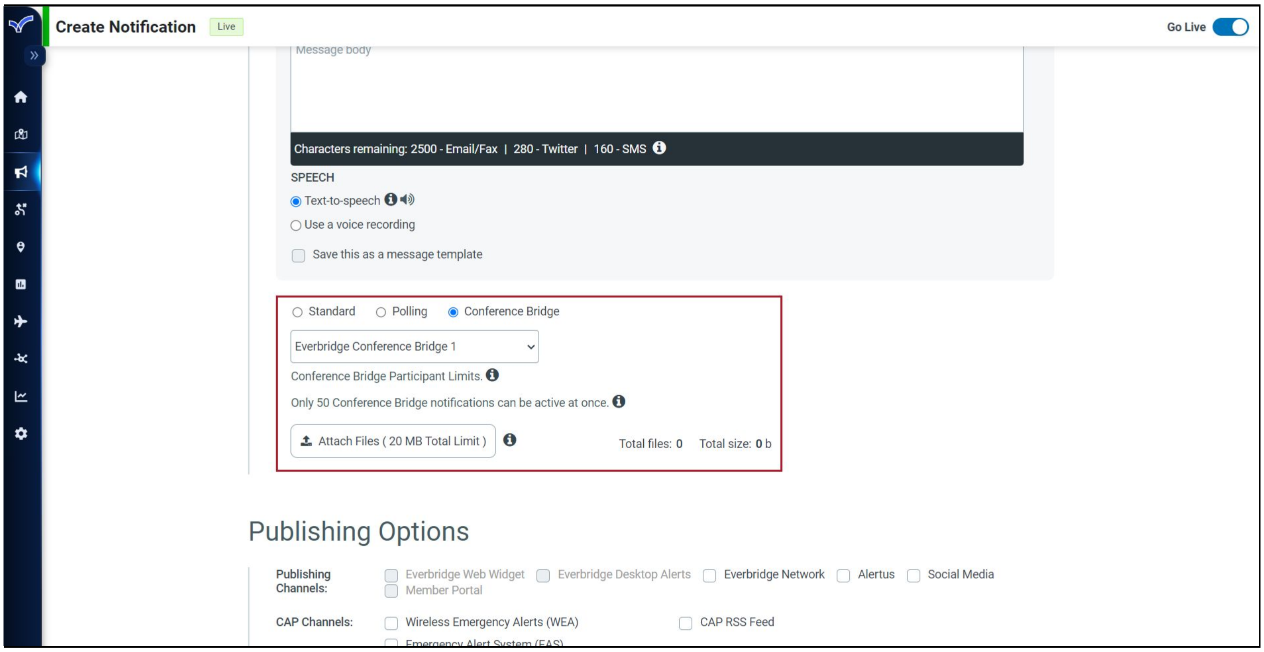


Regardless of which options you chose, once you have filled in the required fields, select **Generate Access Key.**

Conference Bridge

In a **Conference Notification**, the message is to join a conference call. This could be an emergency where contacts need to discuss the situation immediately. Or, it might be a convenient way to pull everyone together for the weekly status meeting.

You can use the provided Conference Bridges for your Conference Notifications, or you can define your custom Conference Bridges. Additionally, you can create your own Conference Bridges that do not use access codes.

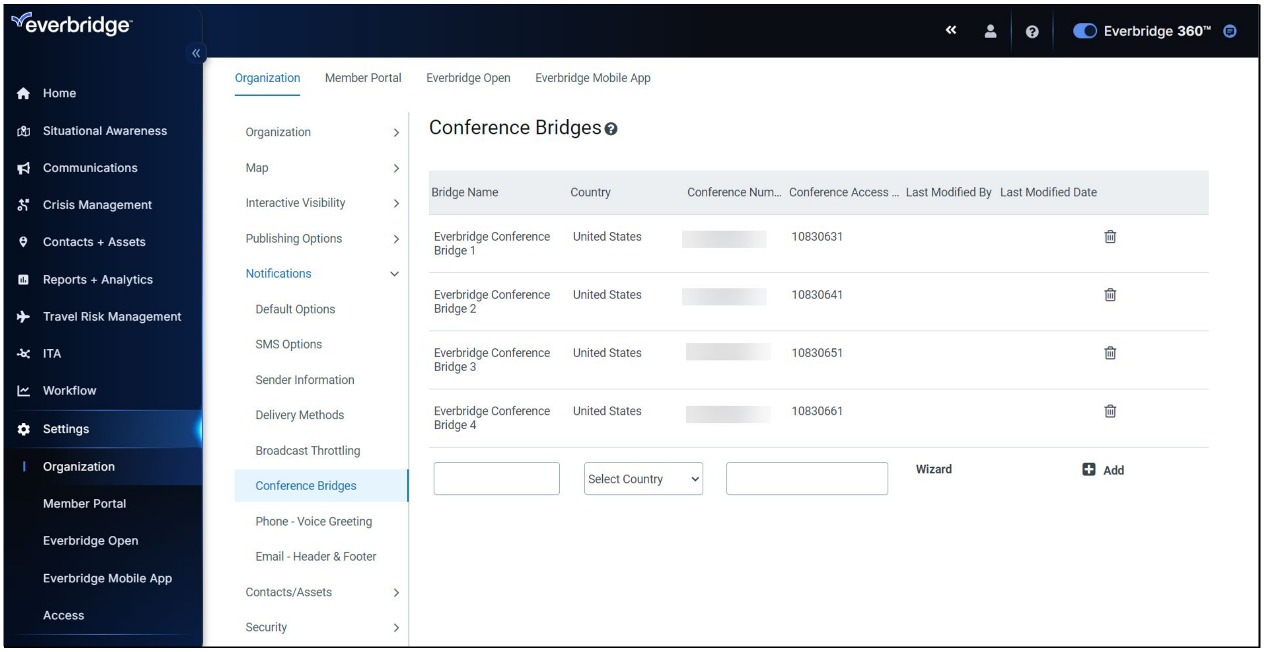


For EverBridge default Bridges, only the first 96 contacts are sent the Notification. For EverBridge custom Bridges, only the first 250 contacts are sent the Notification.

A customer-supplied Conference Bridge must support up to 250 conference callers. Contact your Conference Bridge provider if your conference call account is limited to less than 250 callers.

Custom Conference Bridges

Custom Conference Bridges can be created from **Settings** > **Organization** > **Notifications** > **Conference Bridges**.



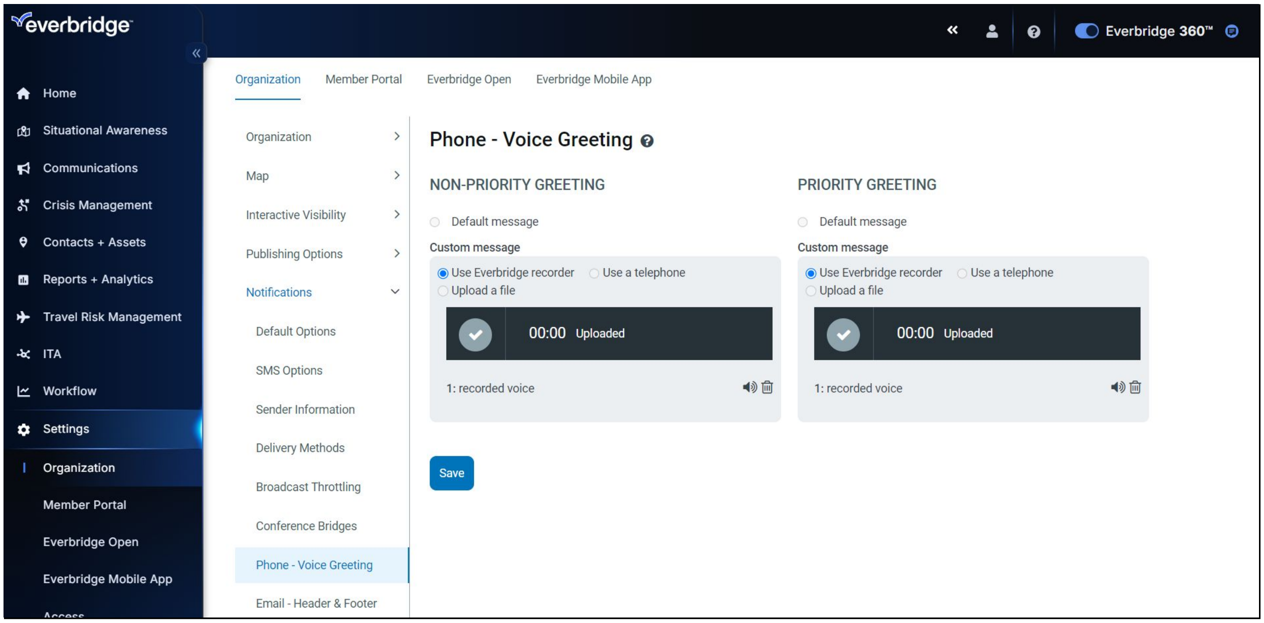
To create a custom Conference Bridge:

1. **Bridge Name** - Enter the desired name for the Bridge; this is the name your users see in the list of Conference Bridges when preparing a Notification.
2. **Country** - Select the country that corresponds to the location of the conference service, so EverBridge Suite knows how to connect to the service.
3. **Conference Number** - Enter the phone number. Do not include the country calling. Enter the phone number in international format, as if the number was being called from outside the selected country.
4. **Wizard** - Use the wizard to either enter the Access Code or the instructions for navigating the conference service menu, such as if the conference service requires pauses and special key presses to connect the recipient to the Bridge. For example, there is a 1-second pause after you dial the conference service phone number before you hear the prompts for the menu. The conference service prompts the caller to enter the access code followed by the "#" key. The conference service then prompts the caller to confirm the access code by pressing 1. Also, assume the conference access code is 9009. Use the following steps to add the complete access code and dialing instructions.
   a. Wait for a few seconds—Click **>>** to enter a 1 in the **Access Code Steps** box (this is the pause you experience after you dial the conference service phone number and before you hear the prompt to enter the access code).
   b. Access Code (A)—Enter `9009` and click **>>** to add the Access Code to the Access Code Steps box.

   c. Dial # or 0-9—Select "#" from the list and click ">>" to add this character to the Access Code Steps box.
   d. If needed, change the order of the steps by selecting a step and pressing the Up or Down arrows.
   e. If needed, click the Trash Bin to delete a step and start again.
   f. Click **OK** to save your access code string and close the pop-up box.
5. Click **Add** for your new Conference Bridge entry to save the new record. Your users can now select this Conference Bridge for the Conference Notifications.

Phone - Voice Greeting

The Everbridge application automatically plays a greeting file before delivering your Notification to phone delivery methods. Everbridge provides a default greeting for Priority or Non-Priority messages in each of the languages listed in the **Languages** list of the **Notification Settings** pane.



Custom greetings can be created from **Settings** > **Organization** > **Notifications** > **Phone - Voice Greetin**g. You can add a custom greeting using one of the available options:

- **Use Everbridge recorder** - You can use the microphone on your device to record a voice file.
- **Use a telephone** - You can follow the instructions provided on the screen to call the Everbridge service to record a voice file.
- **Upload a file** - You can follow the on-screen instructions to upload a file from your computing resource. Everbridge uses a file with 8K Hz 8-bit Law, or uncompressed PCM WAV in order to play the audio file during the phone call. Everbridge can also convert the following file formats:
    - 8K Hz 8-bit PCM
    - 8K Hz 16-bit PCM
    - 8K Hz 4-bit ADPCM
    - 8K Hz GSM 06.10
    - 8K Hz mu-Law
    - 11K Hz 8-bit PCM
    - 11K Hz 16-bit PCM
    - 11K Hz 4-bit ADPCM

- 11K Hz GSM 06.10
- 11k Hz mu-Law

After you set a greeting, click **Save**.

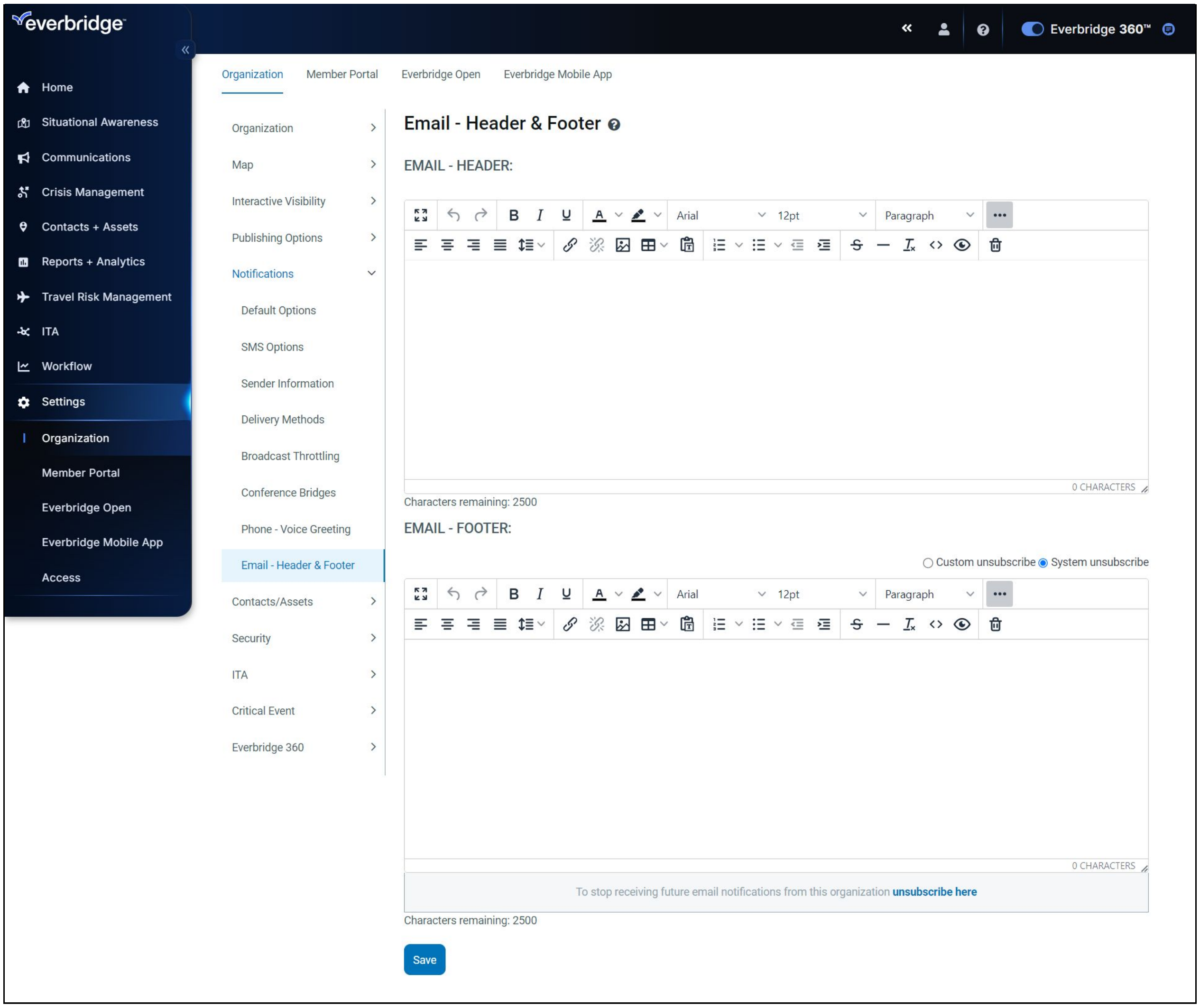
NOTE: At any time, you can use the default greeting with the Everbridge default greeting. To do this, select the **Use default greeting under either Greeting Message (Non Priority or Priority)** button.

Email - Header and Footer

You can insert a custom header and footer to your Notifications sent via email using the **Email Address 1, Email Address 2**, **Email Address 3**, **Email Address 4**, or **Email Address 5** Delivery Methods. If you use this option, then Everbridge Suite inserts this custom content into all email Notifications, and your users do not have the option to view, edit, or disable this option in the Notification form.

When you send a message via email, Everbridge Suite automatically inserts your custom header and footer before sending the email to the recipient.

You can add a header, a footer, or both from **Settings** > **Organization** > **Notifications** > **Email - Header and Footer**. You can use up to 2,500 characters in each text box. Your header/footer can include an image. The image URL must end with an image format file extension. For example, .jpg, .png, or .svg).



In addition, in the footer, choose a **System unsubscribe** link or a **Custom unsubscribe** link. For **Custom unsubscribe**, type the unsubscribe link text. Click **Save** to activate custom content.

> **NOTE:** The custom header and footer might not appear exactly as configured on all email systems. The System Unsubscribe preview is always in US English; the actual output on the email Notification will be in the language of the Notification.

Contacts and Groups

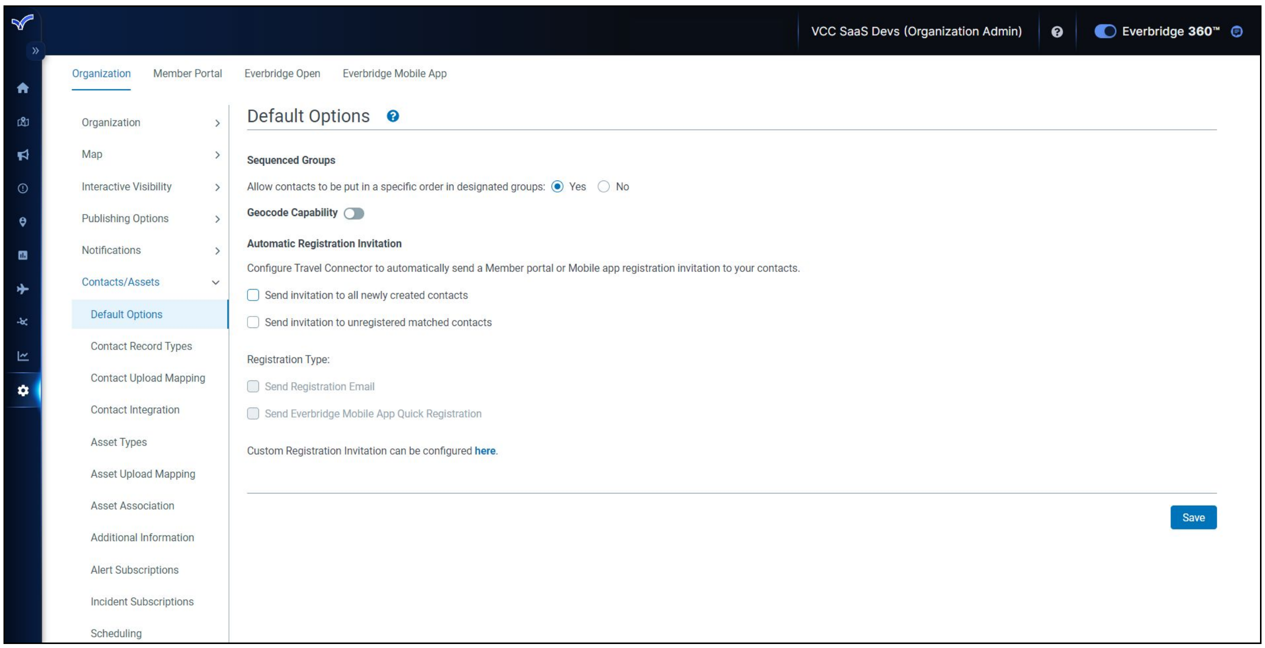
Use the settings in the **Contact and Groups** section to create record types, additional information questions, and subscription fields. You can also configure Secure FTP settings.

NOTE: Customers using Asset Management will instead see the **Contacts/ Assets** menu item.

Contacts and Groups: Default Options

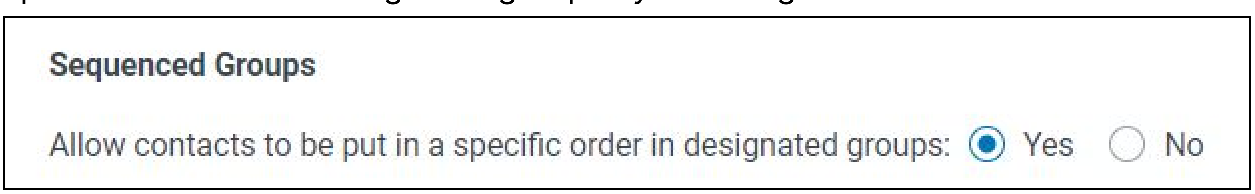
The **Default Options** tab for Contacts and Groups can be accessed from **Settings** > **Organization** > **Contacts and Groups** (or **Contacts/Assets**)> **Default Options.** Here you can configure up to three options:

- Sequenced Groups
- Geocode Capability
- Automatic Registration Invitation (Travel Protector customers only)



Sequenced Groups

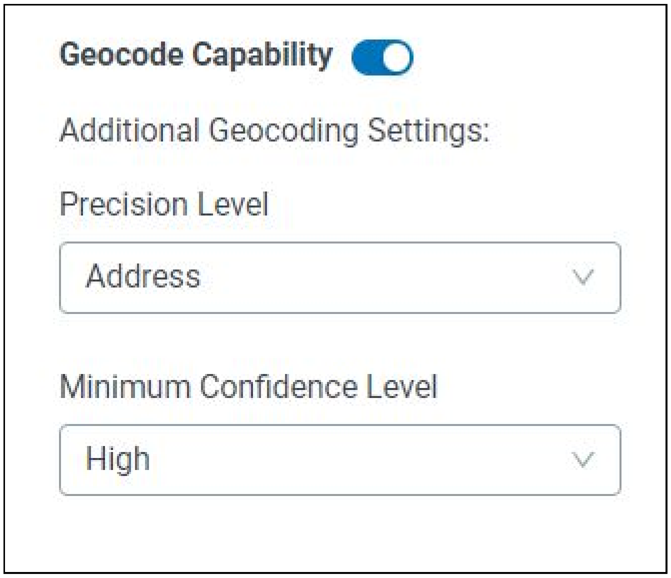
If desired, Administrators can choose if they'd like to allow contacts to be put in a specific order within designated groups by selecting either **Yes** or **No**.



Geocode Capability

Account and Organization Administrators can enable or disable geocoding from the Organization Settings for their Organization(s). This speeds up Contact uploads for Organizations that don't use geocoding features while still providing an address to use when filtering for them.

When Everbridge's vendor returns a geolocation, they also return a **Confidence Level** and a **Precision Level**. If the Confidence and/or Precision Levels are lower than what's been configured for the Organization, the coordinates returned are not added to the contact record. Geocoding can be enabled or disabled by clicking the toggle.



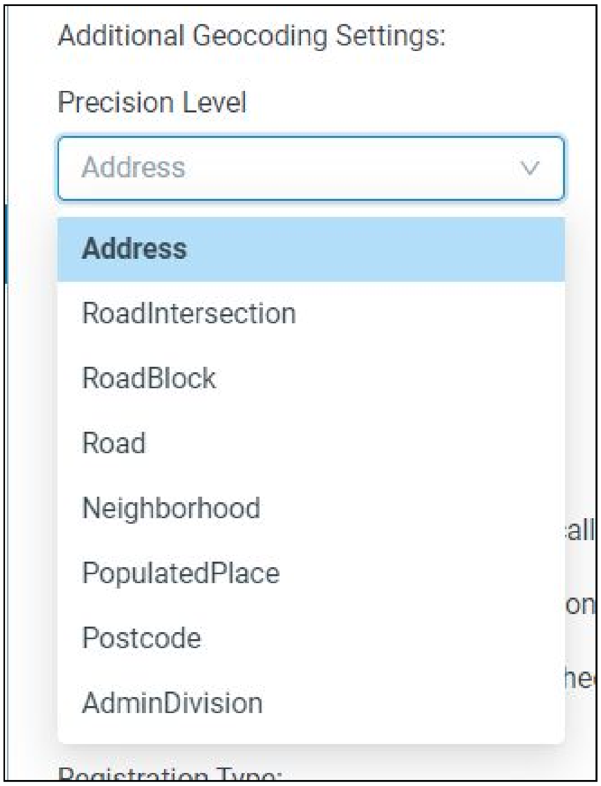
The geocoding settings do not lower the Precision or Confidence Levels of any address. For example, assume that the geocoding settings are set to “Medium” for the Confidence Level and “AdminDivision” for the Precision Level. For an address, let’s assume that the vendor returns a Confidence Level of “High” and a Precision Level of “Address”. The coordinates returned will be added to the contact record. If, on the other hand, the vendor returns a Confidence Level of “Low” and/or a Precision Level of “PostCode”, because the geocoding settings are higher, the coordinates will not be added to the contact record.

Precision Level

A **Precision Level** determines how granular and specific the information should be based on location. The Precision Level can be set to:

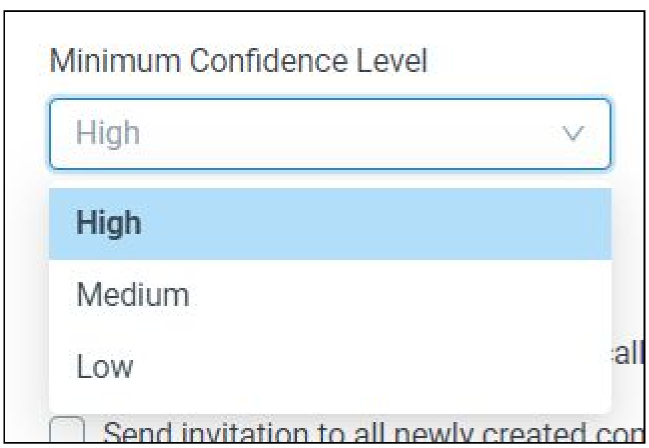
- **Address** - A physical address of a location.
- **RoadIntersection** - A physical intersection between two roads.
- **RoadBlock** - A road.
- **Road** - An open way with an improved surface for efficient transportation of vehicles.
- **Neighborhood** - A section of a populated place that is typically well-known, but often with indistinct boundaries.
- **PopulatedPlace** - A concentrated settlement, such as a city, town, or village.
- **Postcode** - A postal code.

- **AdminDivision** - The administrative level within the country/region level, such as a state or a province.
- **CountryRegion** - A country or region.



Minimum Confidence Level

When geocode information is returned, it's accompanied by a **Confidence Level**. By default, the system will only accept data marked by a High Confidence Level while rejecting any data below the threshold.



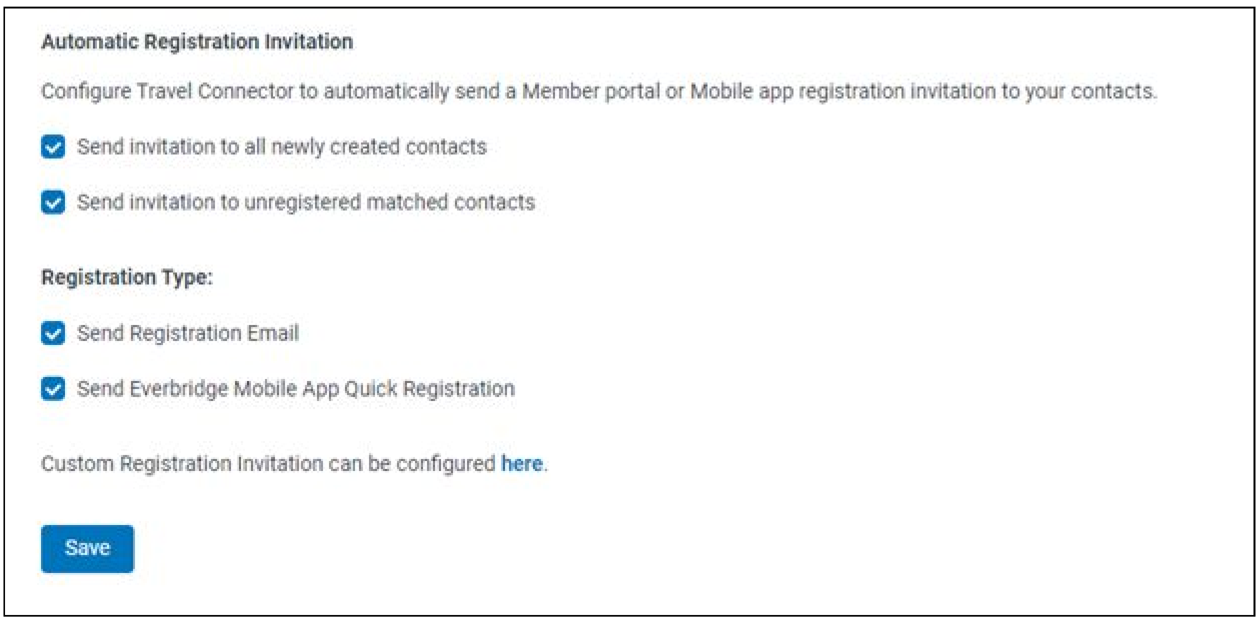
Minimum Confidence options include:

- **High** - The geocode service has high confidence, meaning the address geocoding results only returned one match.

  High is the default Confidence Level in Everbridge Suite.
- **Medium** - The geocoding service can return more than one possible location for a location, and the most likely one will be used for geocoding. **Everbridge recommends this level.**
- **Low** - The geocode service has low confidence in the match, meaning the search has returned several possible locations or one location, but the location(s) do not match the original input. Everbridge does not recommend this confidence level.

Automatic Registration Invitation

Travel Protector customers can configure their system to automatically send a Member Portal or Mobile App registration invitation to travelers who have booked an itinerary.



To configure Automatic Registration Invitations:

1. Select the options for whom to send the registration invitation:
   - **Send invitation to all newly created contacts** - Automatically sends a registration invitation to the newly-created contact when an itinerary is sent to Everbridge and no contact matches the traveler.
   - **Send invitation to unregistered matched contacts** - Automatically sends a registration invitation to contacts who have not yet registered to the app and re-matched to travelers when itineraries are sent to Everbridge.
     - Note: If SSO is enabled for contacts in your Organization, and **Disable registration email for SSO user** has been selected in the

Portal Options, no email registration will be sent to unregistered matched contacts.

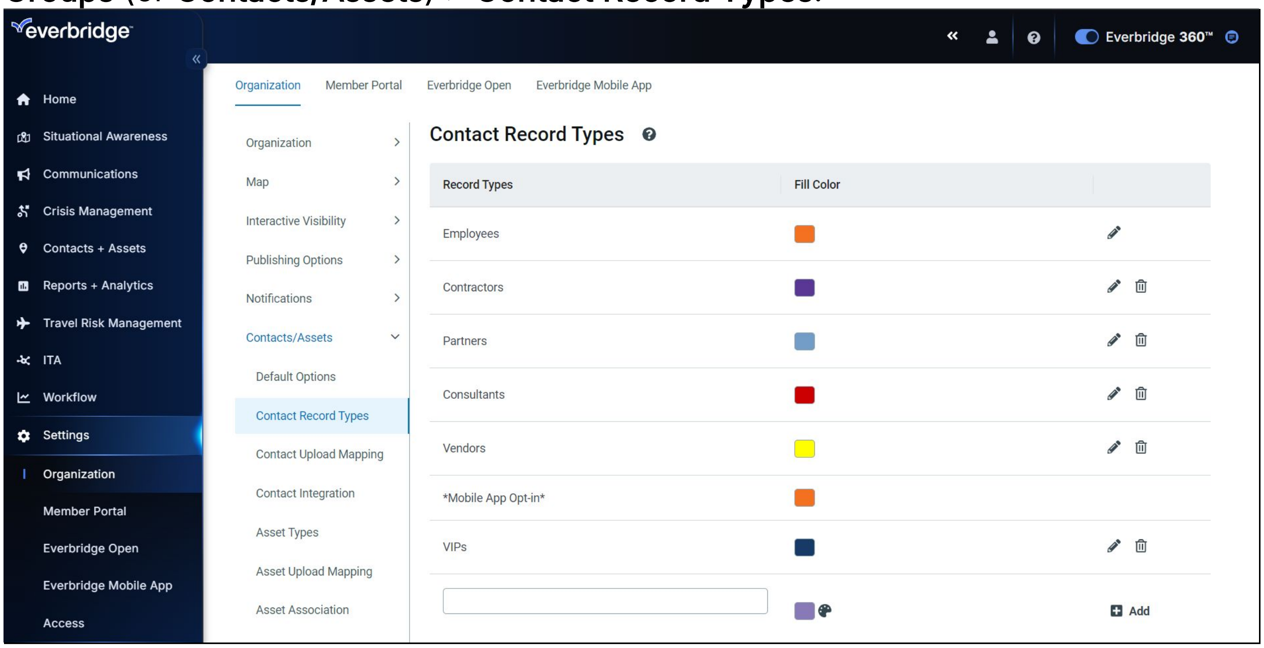
2. Select the registration options:
    - **Send Registration Email** - An email registration will be sent to the contact. When the user receives the email, he or she can select the link to go directly to the **Registration** page. Once registered, the user becomes active and can use the system and log in to the Everbridge Mobile App. See Member Portal Settings for more details.
    - **Send Everbridge Mobile App Quick Registration** - This option is enabled only when:
        - There is a Mobile Push Alert delivery method identified in **Settings** > **Organization** > **Notifications** > **Delivery Methods**.
        - The Private portal type is selected in **Settings** > **Member Portal** > **Portal Options**.
            - Private portal registration invitations expire after 30 days compared to 72 hours for user registration requests. For details on registering, see the Everbridge Mobile App User Guide.
3. Save your settings.

NOTE: You can directly access the **Member Portal** > **Portal Options** page by selecting the link in Custom Registration Invitation can be configured here.

Contact Record Types

Contact Record Types allow you to assign your Contact Records to major categories. This allows you to manage Contact Records separately if the records are sourced from different systems. For example, store employee and contractor records on different systems.

Contact Record Types are defined from **Settings** > **Organization** > **Contacts and Groups** (or **Contacts/Assets**) > **Contact Record Types**.



After defining a Record Type, use them to:

- Search and manage Contact Records.
- Filter the target audience of any Notification.
- Filter search results and reporting results.

> **NOTE:** Since the Record Type field is required in the Contact Record, define the Contact Record Types before adding any Contacts to the Organization.

Record Types

The system has one Record Type configured that cannot be deleted. The default value for this Record Type is **Employee**. If Employee is not a Record Type that your Organization needs, you can change the name.

Some example Record Types include:

- Employee
- Contractor
- Vendor
- Visitor
- Partner
- Internal Personnel
- Citizen
- Doctor or Physician
- Nurse
- General Staff
- Faculty
- Professor or Teacher
- Student
- Parent

Add Record Type names that reflect how you want to classify your contacts. For example:

- **Government** - Employee and Citizen
- **Education** - General Staff, Faculty, Student, Parent, Alumni
- **Health Care** - General Staff, Physician, Nurse

Add a Record Type

To add a Contact Record Type:

1. Type a name in the field.
2. Click **Add**.

Edit a Record Type

To edit the name of a Record Type:

1. Click the Pencil icon for the Record Type that you want to edit.
2. Edit the Record Type's name.
3. Click the **Save** icon, or click the **Cancel** icon to leave the Record Type unchanged.

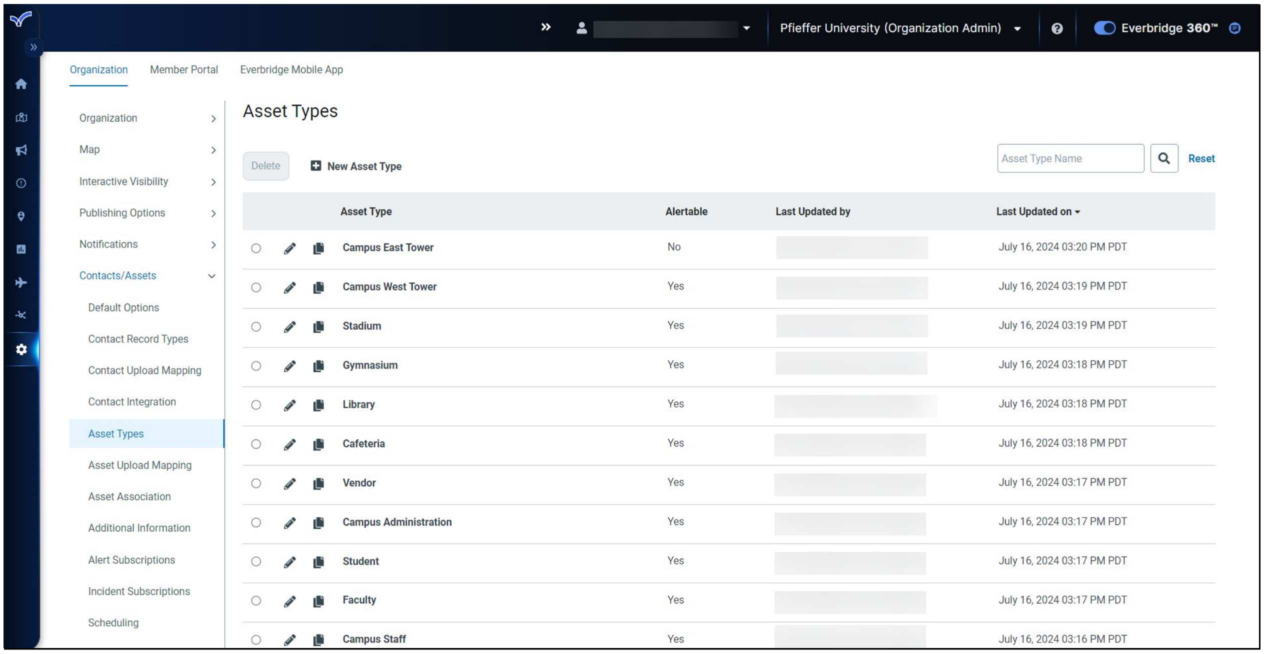
Delete a Record Type

To delete a Record Type:

1. Click the **Trash Bin** in the Content Type row.
2. Confirm that the Record Type no longer appears.

Asset Types

You must define an Asset Type before adding Assets to it. Asset Types are managed from **Settings** > **Organization** > **Contacts/Assets** > **Asset Types**.



The following are the Asset templates:

- SC Building (Safety Connection Building, if applicable)
- Facility
- Person
- Mobile Unit
- Other

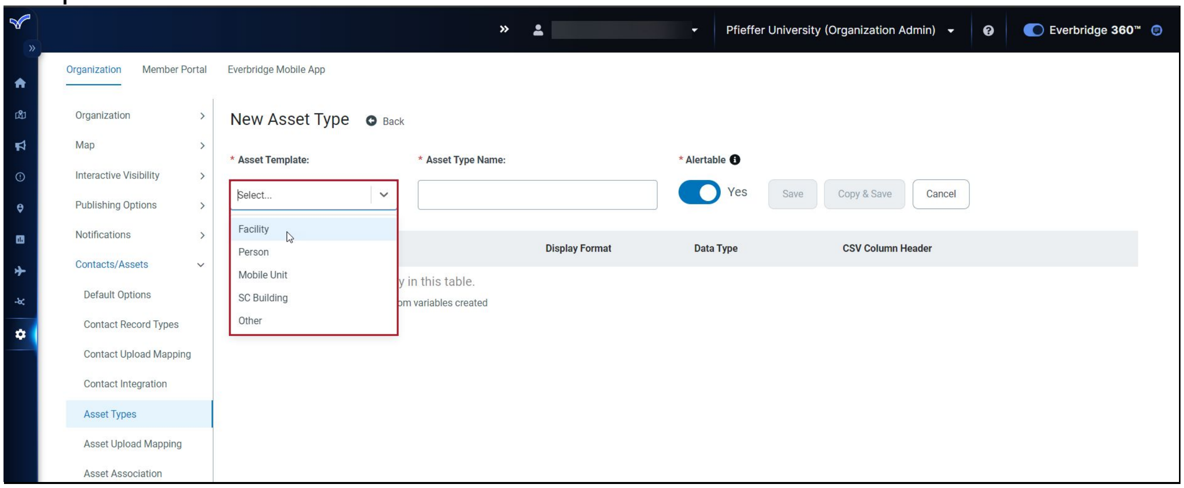
Standard attributes vary depending on the selected Asset template. These default attributes cannot be edited or removed.

Add New Asset Type

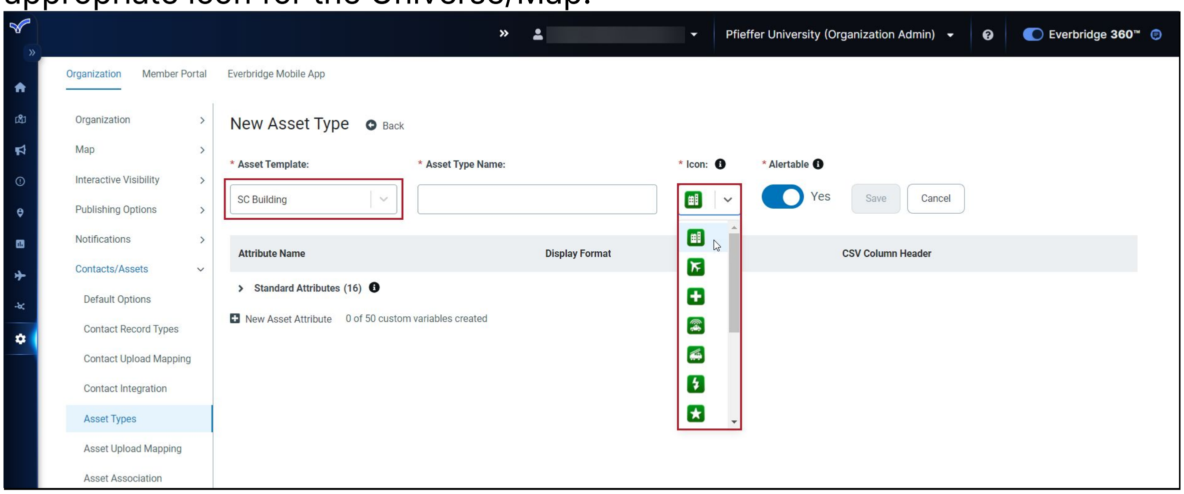
To add a new Asset Type:

1. From **Settings** > **Organization** > **Contacts/Assets**, select **Asset Type**.
2. Click **New Asset Type**.
3. Select the desired Asset Template from the drop-down list. Asset Templates are predefined templates with specific standard attributes based on the

template selected.



4. Give the Asset Type a name.
5. If the Safety Connection Building Asset type was selected, you can select an appropriate icon for the Universe/Map.



6. Toggle on **Alertable** if you want Visual Command Center to generate alerts when Assets of this type may be at risk.
7. Click **Save**.

NOTE: An Organization can only have **one** Asset Type for Safety Connection Buildings. This is because it can have contacts associated with it.

Edit an Asset Type

To edit an Asset Type:

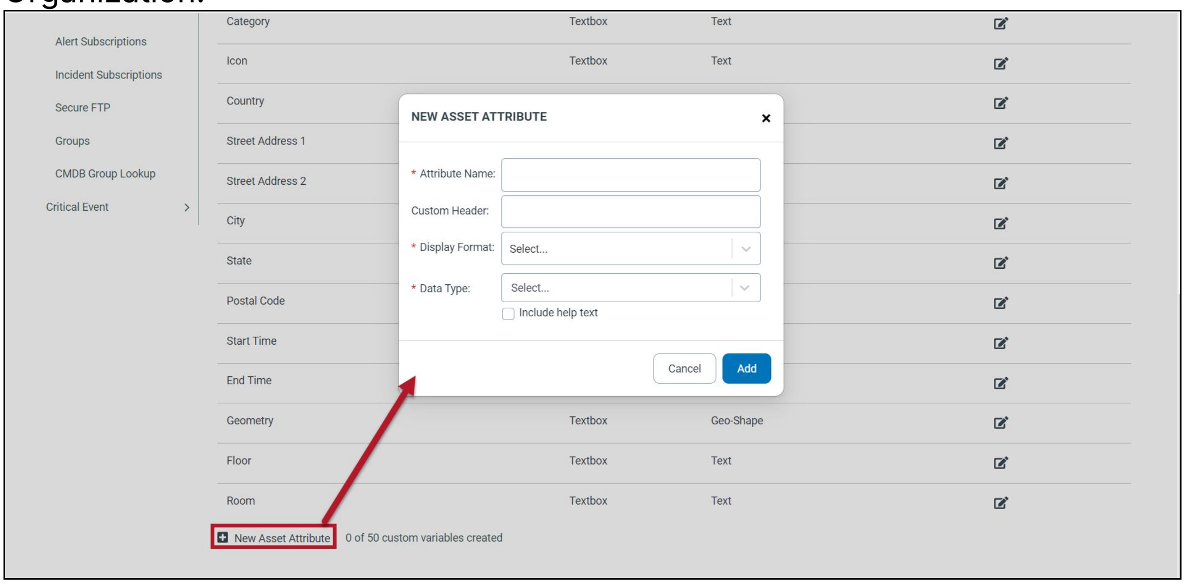
1. From the **Settings** tab, select **Organization** > **Contacts/Assets** > **Asset Type**.

2. Click the **Pencil** icon of the Asset Type you want to change. The **Edit Asset Type** dialog is displayed.
3. Make the desired changes, including creating custom attributes (see Create a Custom Asset Attribute).
4. Click **Save**.

Create a Custom Asset Attribute

To create a Custom Asset Attribute:

1. Click **New Asset Attribute** to add a custom attribute. The number of custom attributes will vary depending on what has been provisioned for your Organization.



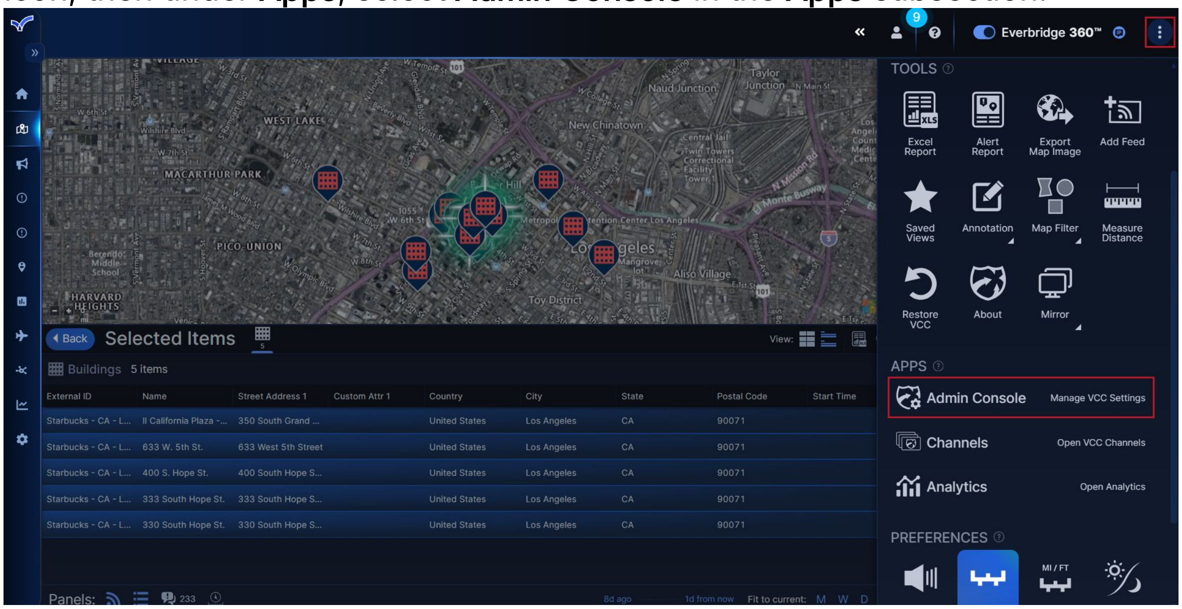
2. Fill in the Attributes:
   - **Attribute Name**
   - **Custom Header**
   - **Display Format**
     - Textbox
     - Single Selection List
     - Multiple Selection List
   - **Data Type**
     - Text
     - Boolean
     - Whole Number
     - Decimal Number
     - Date
     - URL
   - **Include Help Text** - Select the checkbox to include Help Text, if needed. Then enter the Help Text in the field. Currently, the Help Text displays only on the **Edit Custom Attribute** dialog. Click **Add**.

3. Click **Save**.
4. Click the **Back** link to return to the list of Asset Types.

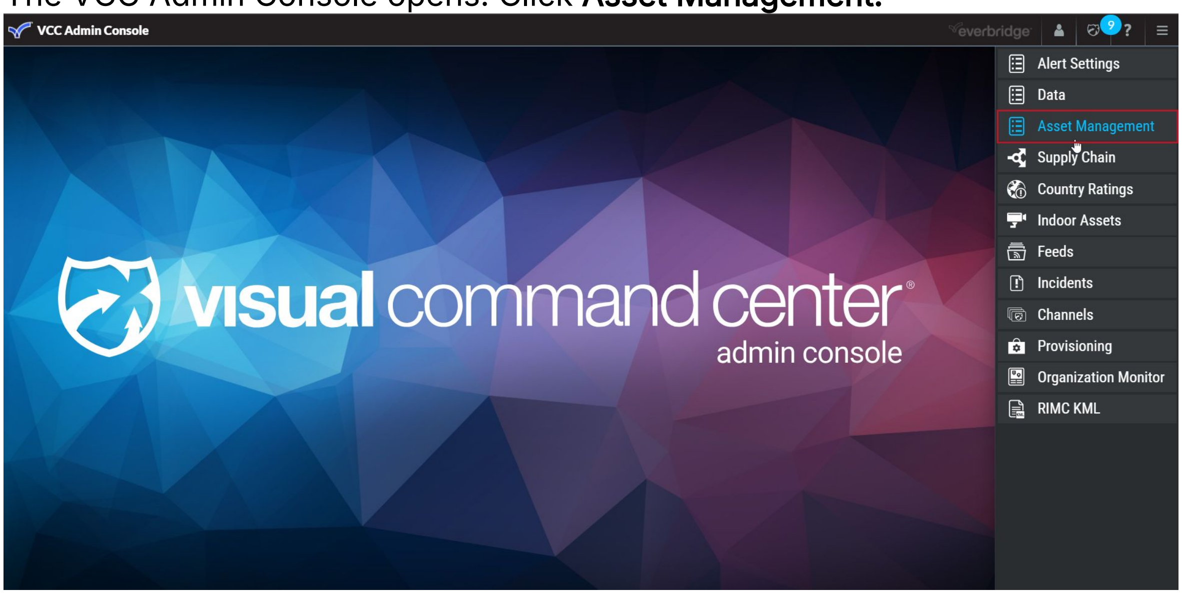
Manage Data Settings

To manage data settings for an Asset Type:

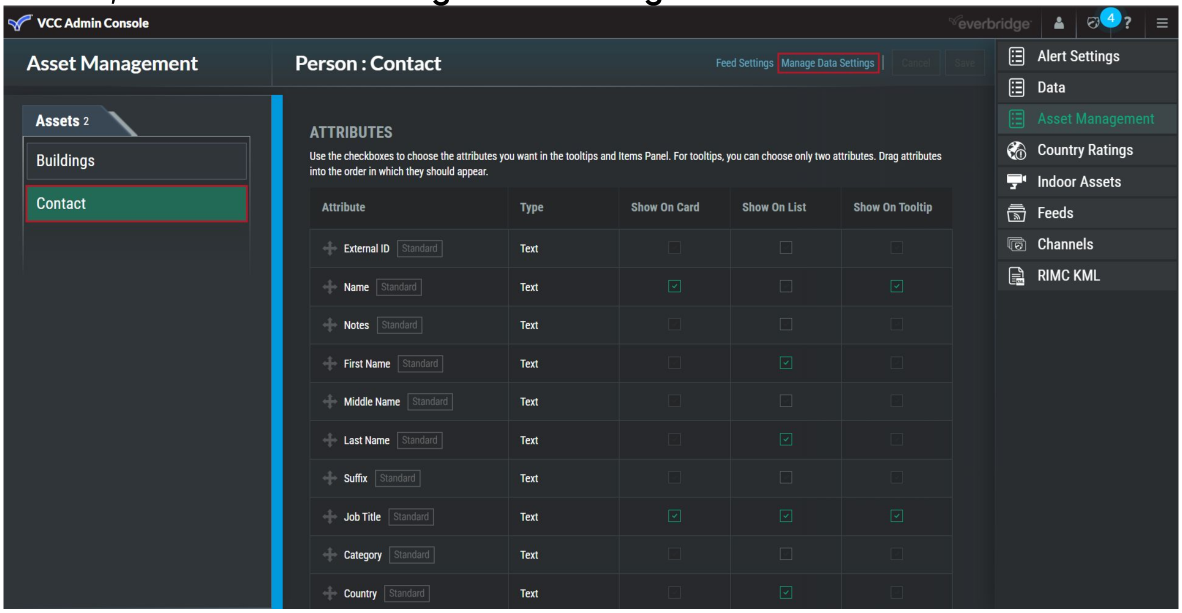
1. From the Visual Command Center Operator Console, click the kebab menu icon, then under **Apps**, select **Admin Console** in the **Apps** subsection.



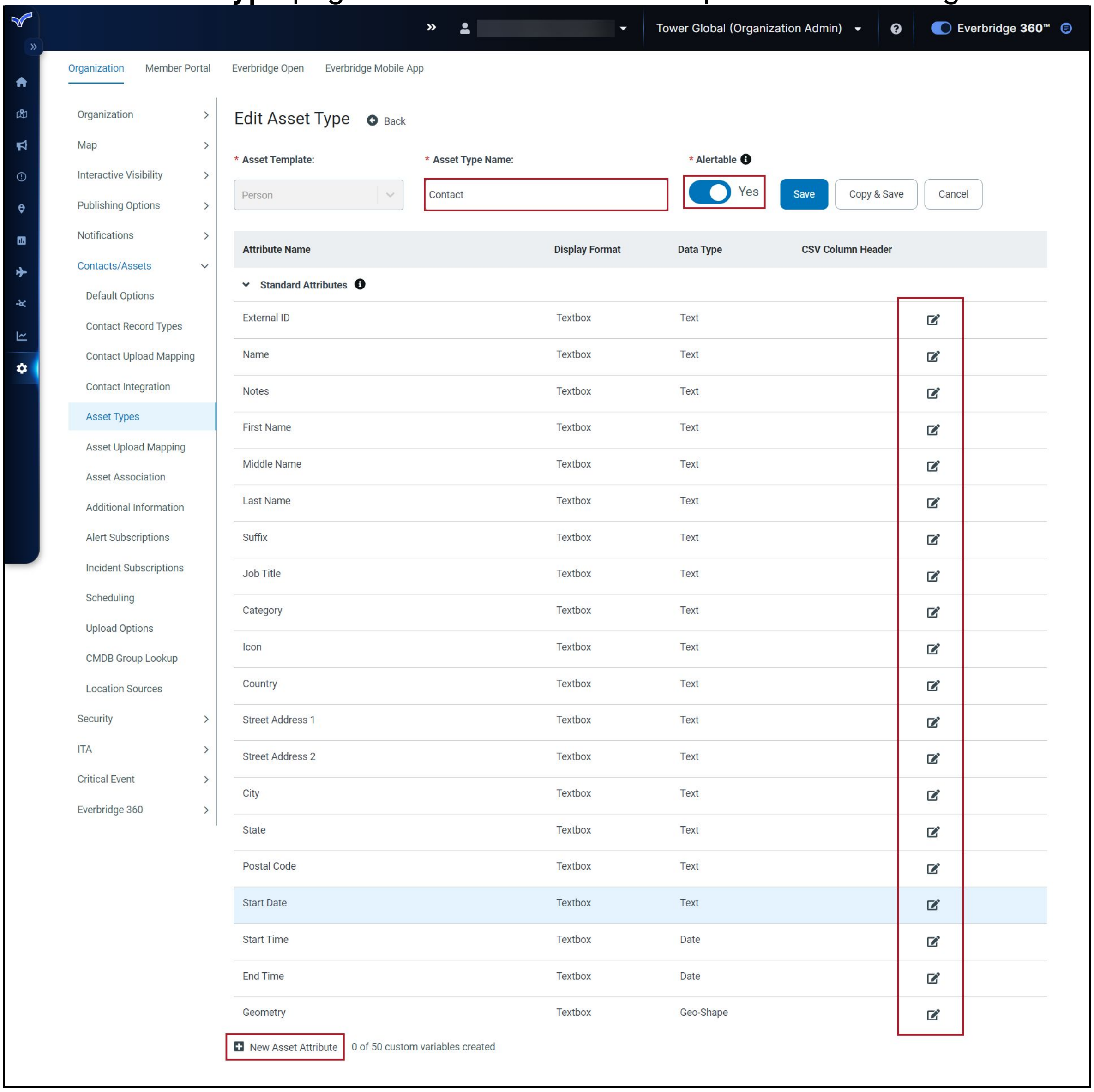
2. The VCC Admin Console opens. Click **Asset Management.**



3. The **Asset Management** page opens. Choose an Asset Type from the list to the left, and then click **Manage Data Settings**.



4. The **Edit Asset Type** page for the selected Asset opens in the Manager Portal.



The following actions can be taken from this page:

- Edit Asset Type Name
- Set as Alertable (Yes/No)
- Edit CSV Column Headers for individual Attributes
- Add or edit custom Asset Attributes
  - NOTE: Standard Attributes are inherited from the Asset Template and cannot be edited or removed.

5. Click **Save** once the desired changes have been made.

View an Asset Type and Its Attributes

To view an Asset Type and its attributes:

1. From **Settings** > **Organization** > **Contacts/Assets**, select **Asset Type**.
2. Click the name of the Asset Type to view details.
3. Click **Standard Attributes** to view the attribute name, display format, and data type.
4. Click the Back button to return to the list of Asset Types.

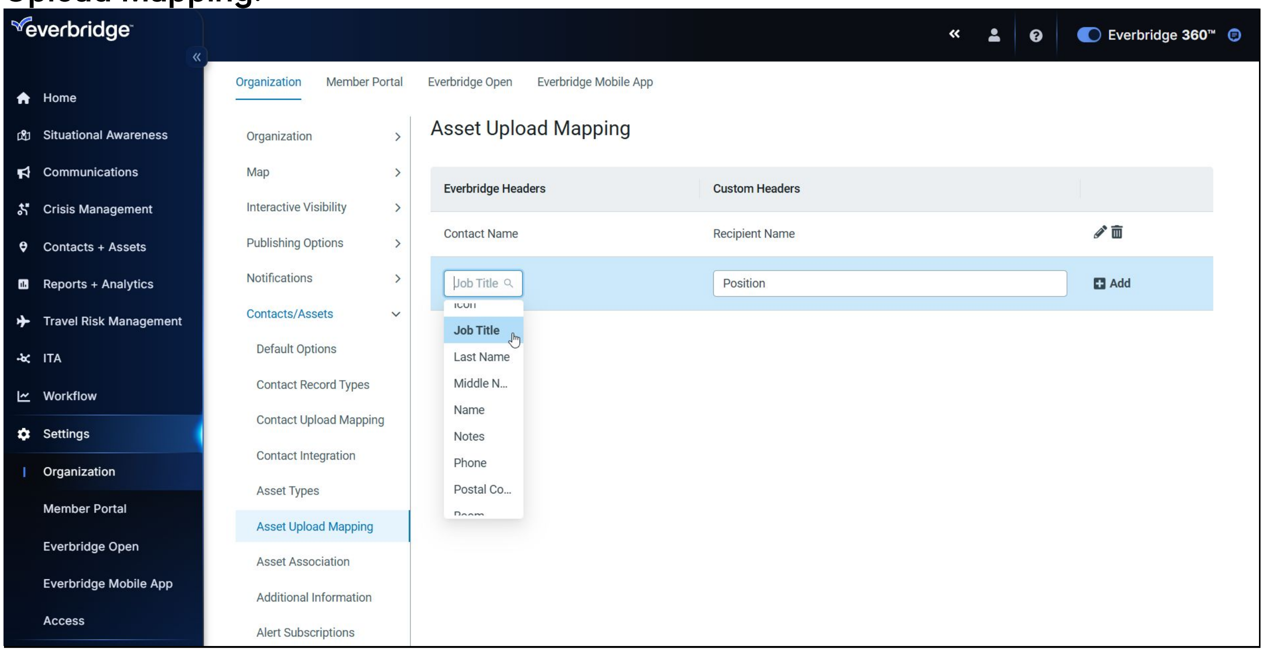
Delete Custom Attributes

You can delete a custom attribute that is not being used by an Asset. However, if at least one Asset has the value populated for the Custom Attribute, you are not allowed to delete it. Instead, you see the **Custom Attribute Cannot Be Deleted** dialog, where the body of the message explains "Custom attribute cannot be deleted as one or more Assets are using this."

1. Select the Trash Bin of the Custom Attribute to be deleted.
2. Click **Confirm**.

Asset Upload Mapping

Asset Upload mapping allows administrators to map Everbridge-required Asset Upload template headers to their own custom headers. These mappings can be configured at the Organization level from **Settings** > **Contacts/Assets** > **Asset Upload Mapping**.



> **NOTE:** If you do not have Asset Management and would like to learn more about this product feature, please contact your Everbridge Account Manager.

Creating an Asset Upload Mapping

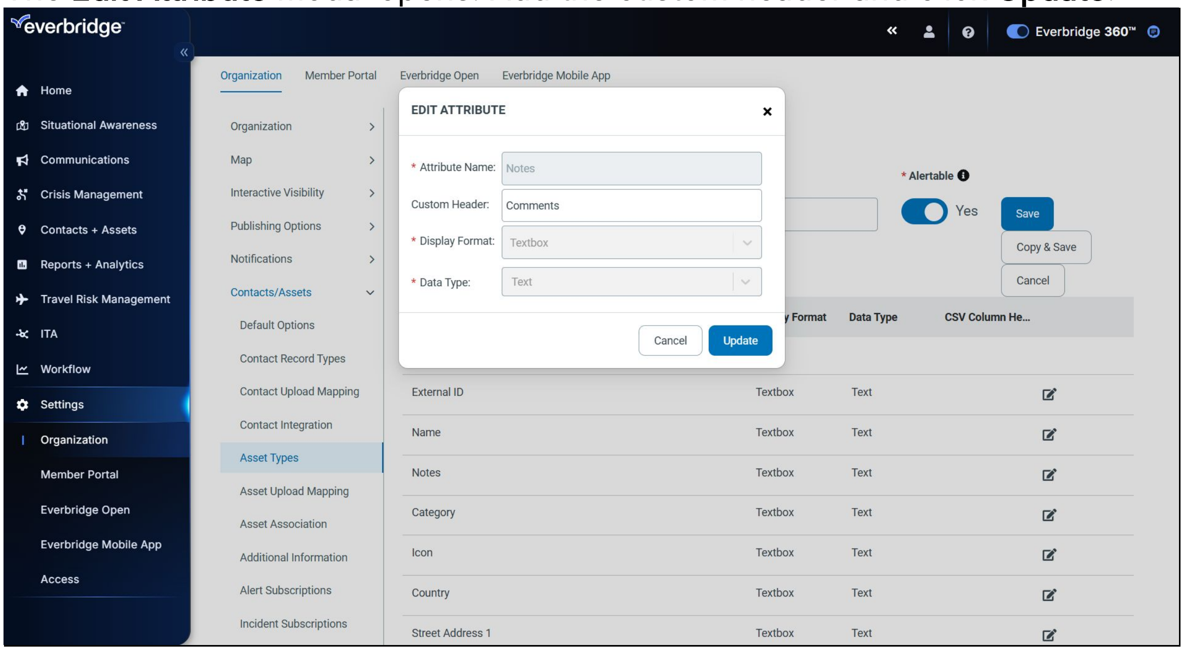
To create a new Asset Upload Mapping:

1. Navigate to **Settings** > **Contacts/Assets** > **Asset Upload Mapping**.
2. Select a system-required header in the **Everbridge Headers** column.
3. Enter the desired header name in the **Column Headers** column.
4. Click **Add**.

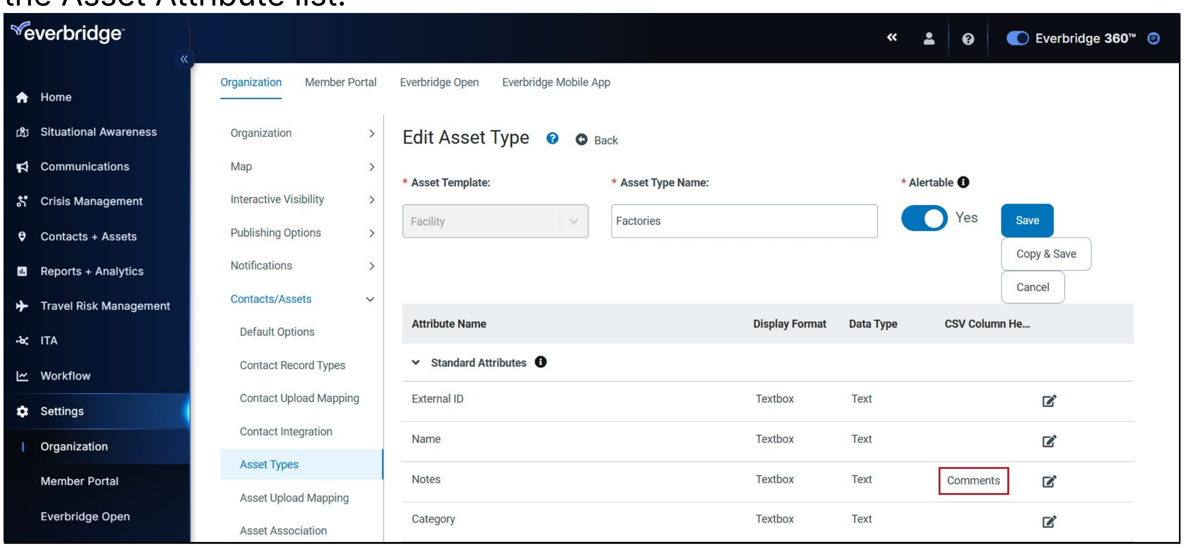
Assigning a Custom Header to an Asset Attribute

Upload mappings can be applied to individual Asset attributes. To do so:

1. Navigate to **Settings** > **Contacts/Assets** > **Asset Types**.
2. Either create a new Asset type or edit a preexisting one. For this example, we'll edit the Factories Asset type by clicking the **Edit** button.
3. Expand the list of attributes and click **Edit** on the one that needs to be mapped.
4. The **Edit Attribute** modal opens. Add the custom header and click **Update**.



5. The new custom header will appear in the **CSV Column Header** column on the Asset Attribute list.



Asset Associations

Asset Associations allow you to associate contacts with your Assets. These associations can be leveraged in CEM Orchestration workflows to allow precisely targeted communication to Asset stakeholders.

Asset Associations can be configured in three steps:

1. Create Association Types.
2. Associate Contacts or Groups to Assets.
3. Add Associations to CEM Orchestration Workflows for dynamic Notifications.

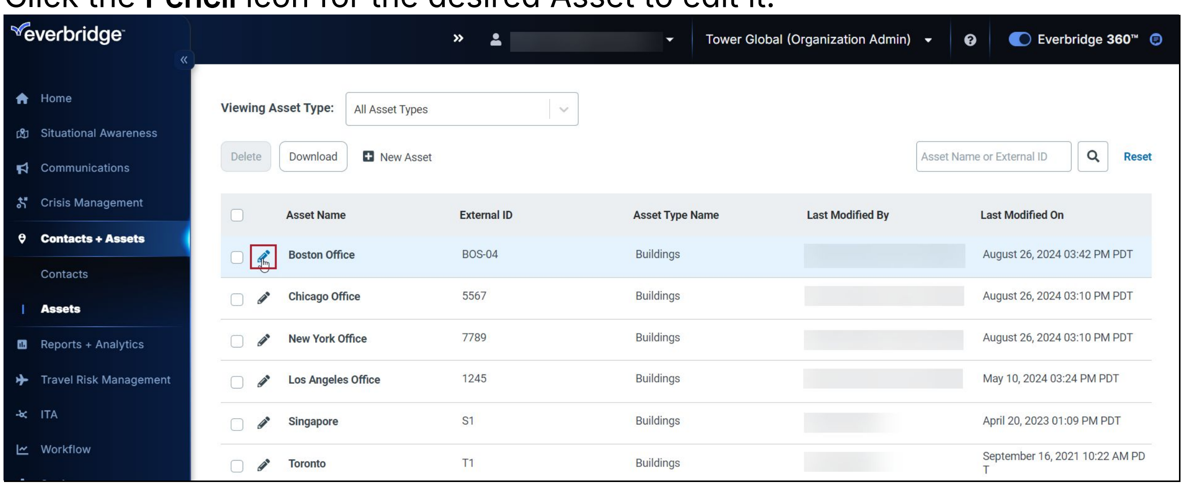
Create a New Asset Association Type

1. Log in to the Everbridge Manager Portal and select your Organization.
2. Navigate to **Settings** > **Organization** > **Contacts/Assets** > **Asset Association**.
3. Click **New Asset Association**.
4. Add Association Label, e.g., Facility Security, District Manager, Regional Manager. This can be any you choose, but each must be unique across the org (no duplicates).
5. Click **Save**.

Link New Asset Association to Assets

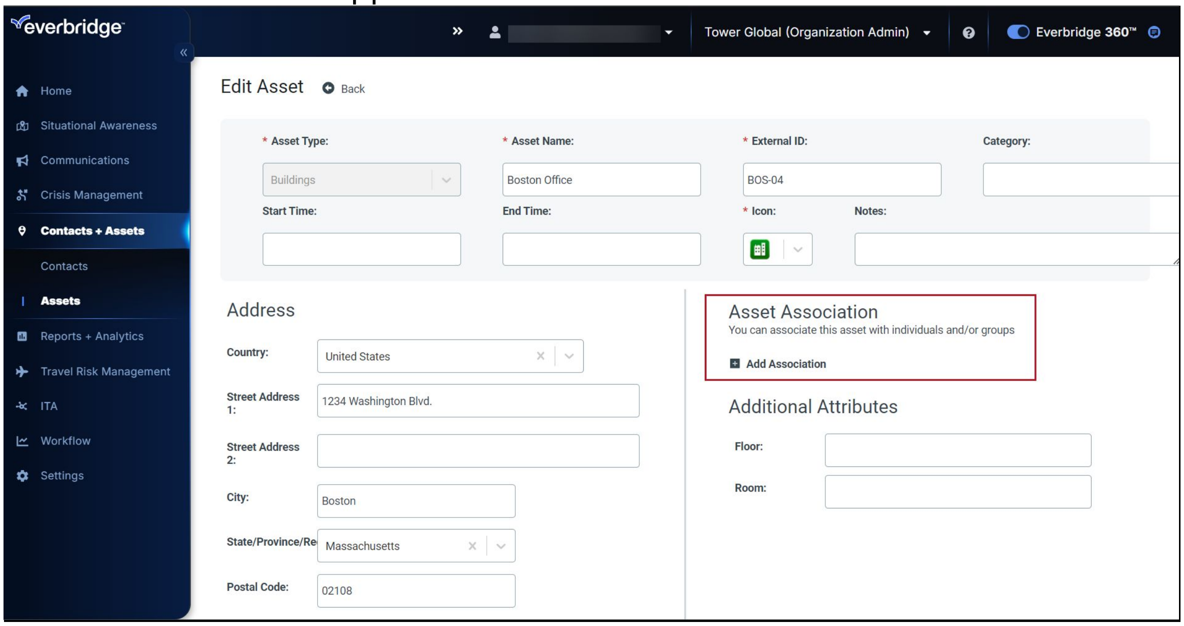
To link the new Asset Association to an Asset:

1. Navigate to **Assets** > **Asset List**.
2. Click the **Pencil** icon for the desired Asset to edit it.

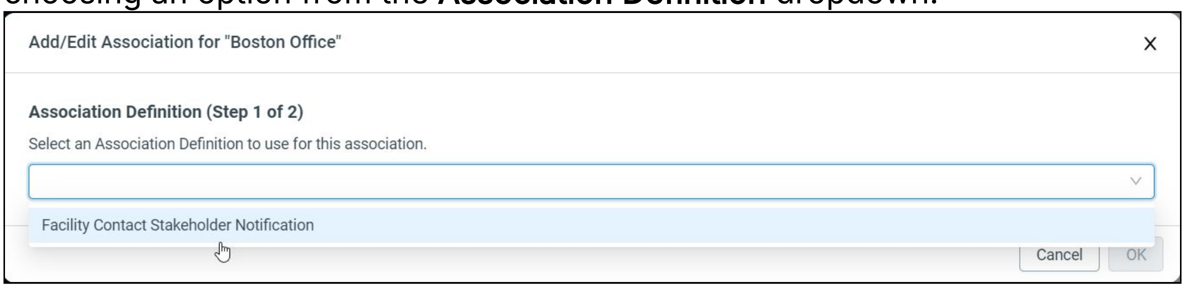


- Associations can also be linked on the **New Asset** page when creating an Asset.

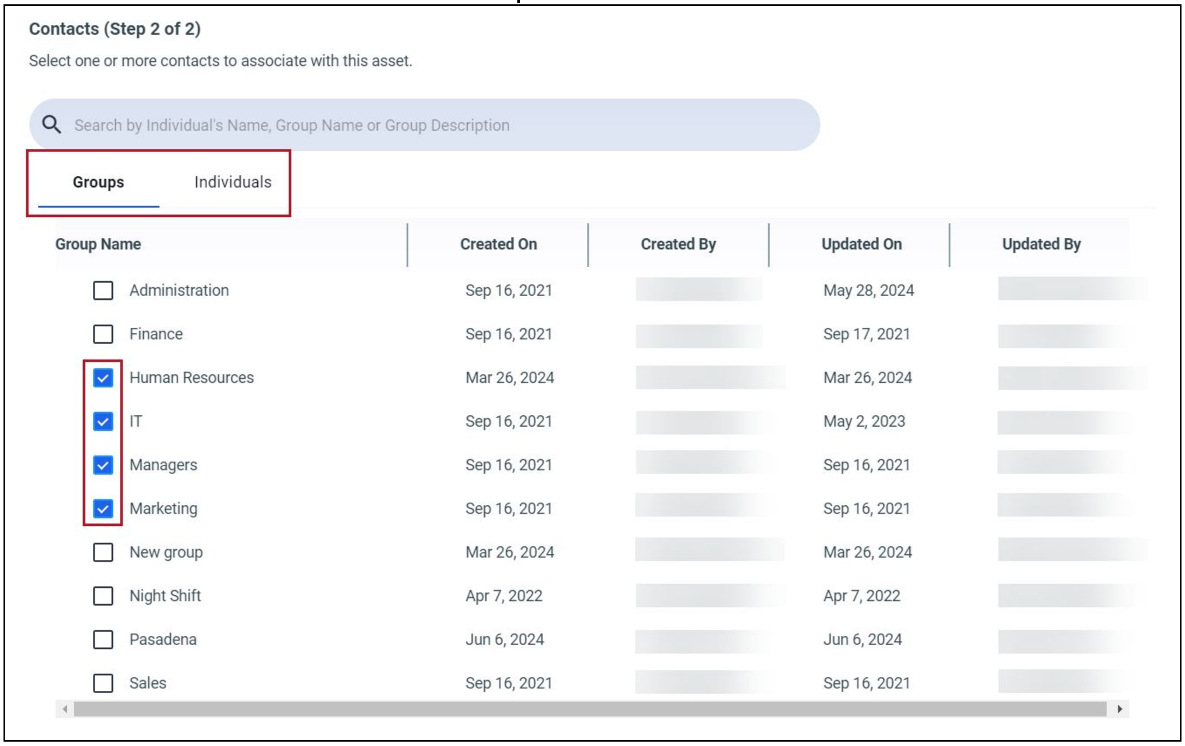
3. The **Edit Asset** modal appears. Select **Add Association**.



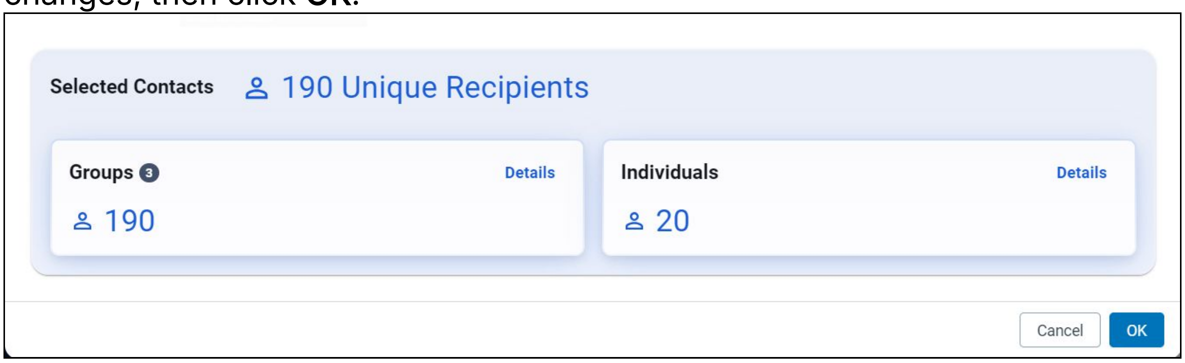
4. Select which type of association you want to define for the selected Asset by choosing an option from the **Association Definition** dropdown.



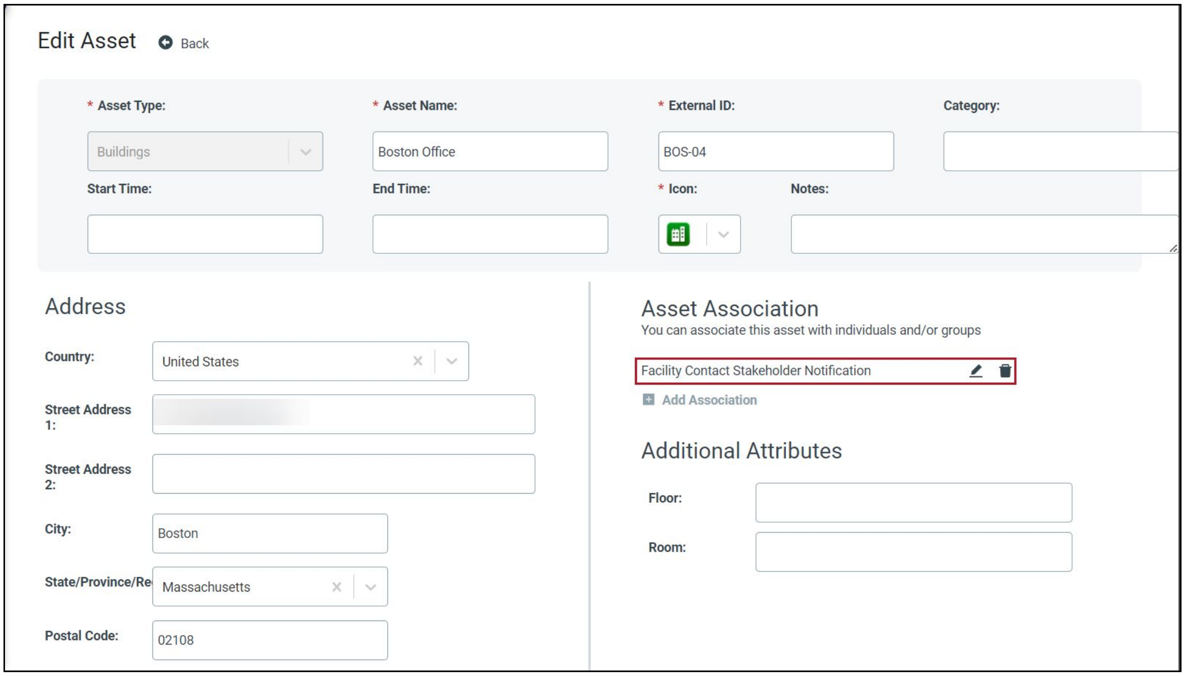
5. Choose Contacts or Contact Groups to associate with this Asset.



6. Check the preview of the targeted contacts and groups to make any needed changes, then click **OK**.



7. The new association will now appear in the **Asset Association** section on the selected Asset record.



Managing Asset Associations via File Upload

You can include your Asset-contact associations in your Asset file uploads. Once you have defined Asset Association types in your Organization, your Asset upload templates will include two new columns for each defined Association Type: one for **Contacts** and one for **Contact Groups**.

Data Format: Associated Contacts

For Associated Contacts, the expected format is a pipe ("|")-separated list of Contact external IDs

For example, the "Site Security" Asset Association comprises two individuals, whose contact records have the external IDs "EH1002" and "Anne.Boyle@employee.com" respectively. Both Contacts will be included in "Facility Contact" communications when the associated Asset is affected.

Associated Contacts - Site Security
EH1002 | Anne.Boyle@employee.com

Data Format: Associated Contact Groups

For Associated Groups, the expected format is a pipe-separated list of Group names.

For example, the "District Managers" Asset Association contains two contact groups: "District 9 Managers" and "District Oversight Committee". All Contacts in either of these Groups will be included in "Facility Contact" communications when the associated Asset is affected.

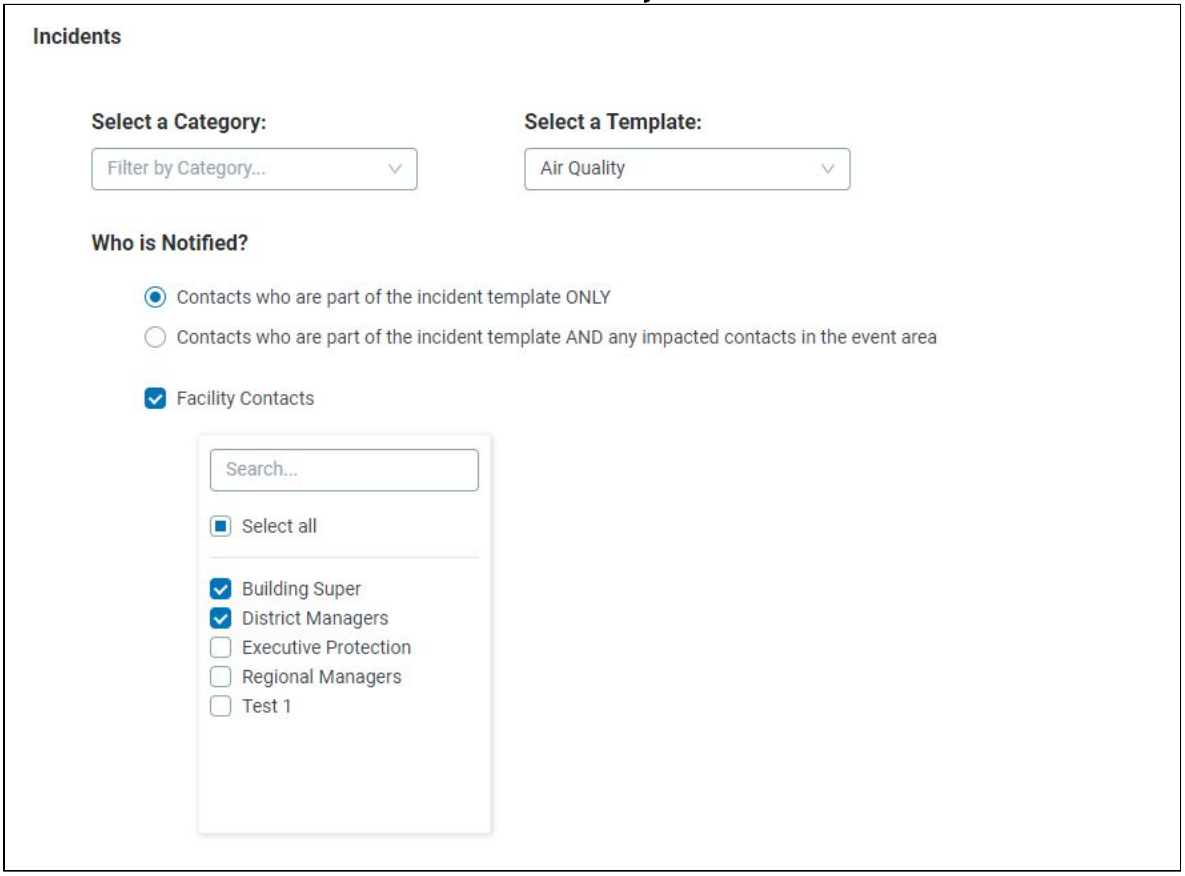
<table>
<tr><th>Associated Contact Groups - District Managers</th></tr>
<tr><td>District 9 Managers | District Oversight Committee</td></tr>
</table>

<table>
<tr><th></th><th>P</th><th>Q</th><th>R</th><th>S</th><th>T</th><th>U</th></tr>
<tr><td>1</td><td>Associated Contacts - District Managers</td><td>Associated Contact Groups - District Managers</td><td>Associated Contacts - Regional Managers</td><td>Associated Contact Groups - Regional Managers</td><td>Associated Contacts - Site Security</td><td>Associated Contact Groups - Site Security</td></tr>
<tr><td>7</td><td></td><td>District 9 Managers | District Oversight Committee</td><td></td><td>East Africa Regional Security Team</td><td>EH1002 | Anne.Boyle@employee.com</td><td>Kenya Security Team | Nairobi Office Site Security Team</td></tr>
</table>

Using Asset Association in Alert Workflows

1. At the Organization level, navigate to **Workflow > CEM Orchestration**.
    - The above path isn't available when the Legacy UI is applied, so workflows can also be created and maintained from **Settings** > **Everbridge Open** > **CEM Orchestration** > **Workflow List**.
2. Select a specific Workflow, then click **Actions**.

3. Under **Incidents** you can select Facility Contacts to be added to your Incident Communications for the Assets affected by the alert.

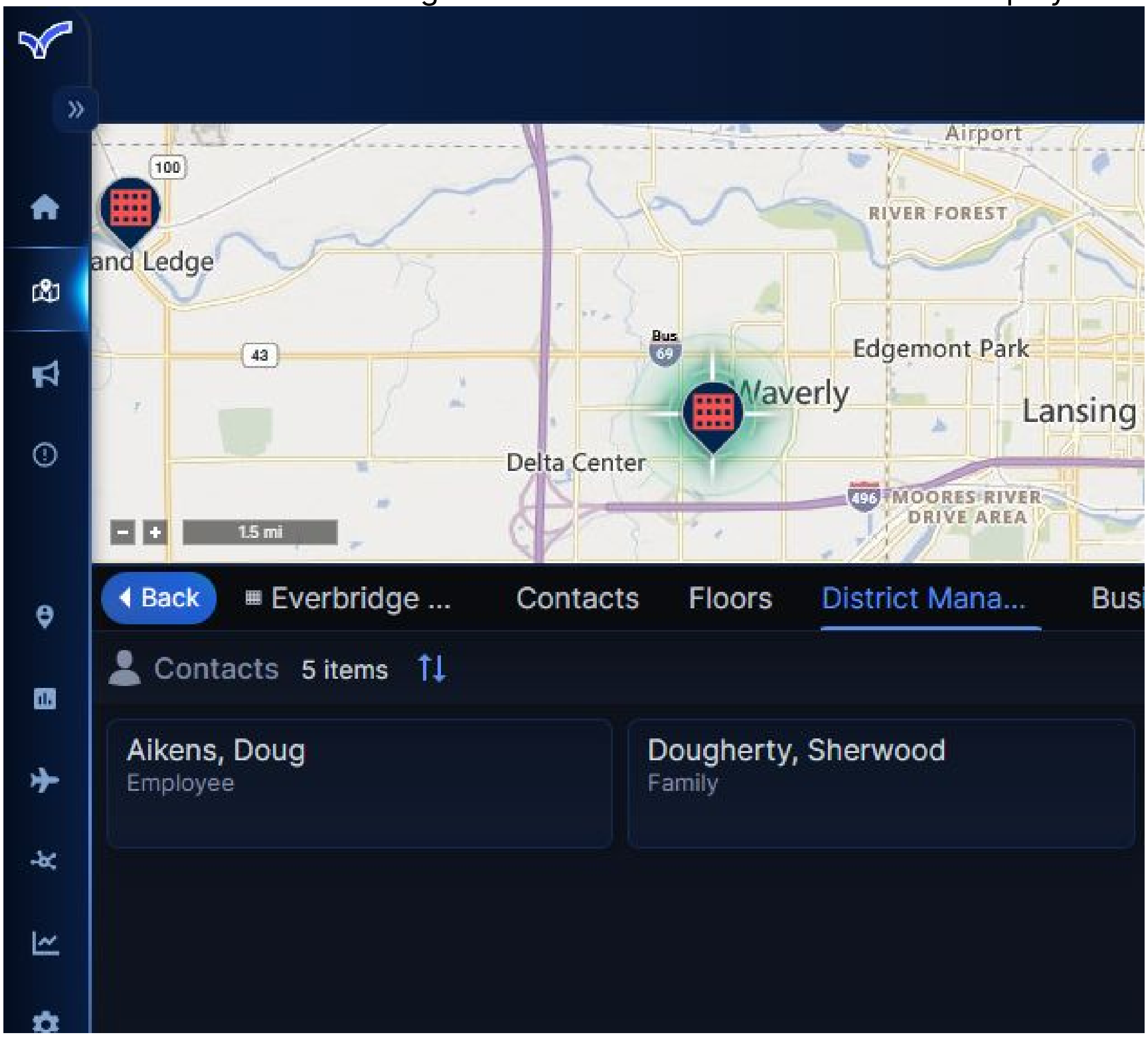


View Associations in Visual Command Center Operator Console

To view Associations in the VCC Operator Console:

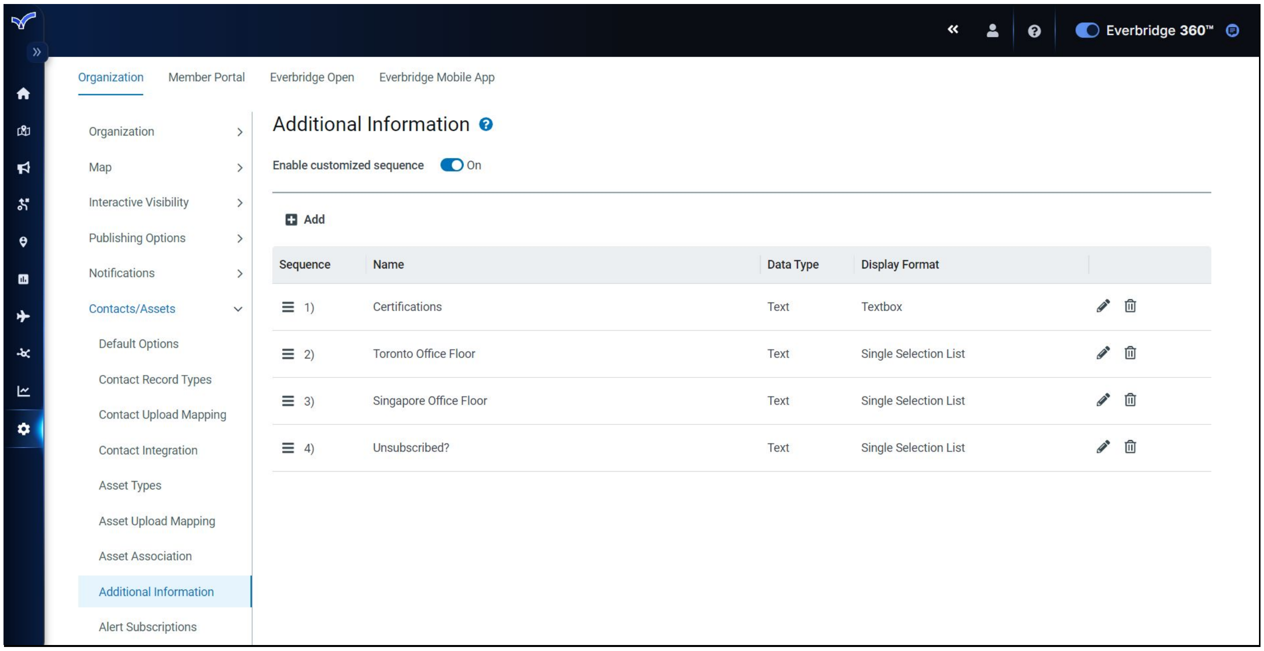
1. Navigate to **Situational Awareness** > **Visual Command Center**.
2. Access an Asset for which you've created an Asset Association and added at least one User or Group.

3. The Asset Associations configured for that Asset will be displayed. If no Asset Associations are configured the Association tab will not be displayed.



Additional Information

You can define custom data fields for filtering Contact Records for a Notification from **Settings** > **Organization** > **Contacts and Groups** (or **Contacts/Assets**) > **Additional Information**.



Examples could be:

- The location where an employee works.
- The title or department of an employee.
- A particular skill or certification.

Each field can use any of the following formats:

- **Text box** - Allows any value. Use this format when the consistency of the value is not important for users. For example, a field called "Commute Method" could accept the values "bus" and "city bus."
- **Single selection drop-down list** - Contains a list of allowed values. Use this format to ensure the Contact Record value is part of a list of allowed values.
- **Multiple selection drop-down list** - Contains a list of allowed values. Use this format to ensure the Contact Record value is part of a list of allowed values.

Each field can accept the following data types:

- **Text** - Accepts any string.
- **Number** - Must contain digits 0-9.

- **Date** - Uses the date format according to the language selected in the user profile.

There are no limits to the number of fields you can define.

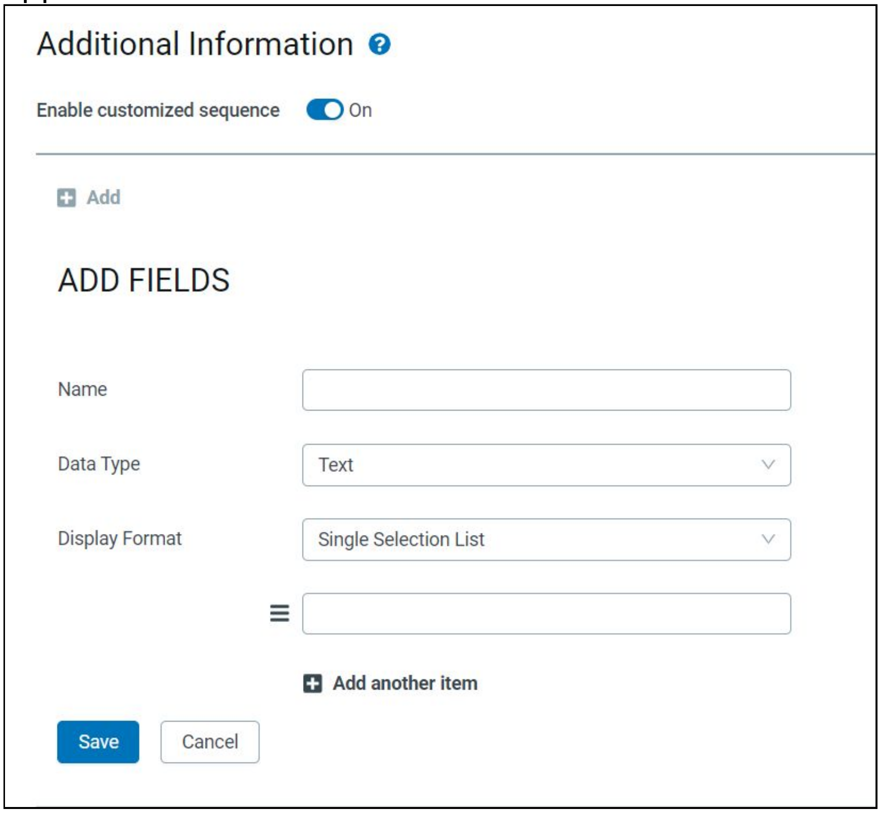
> **NOTE:** Everbridge Suite does not add an empty field to a Contact Record if you do not define a value for the custom field in that Contact Record. For example, assume you have a custom field named "Work Location". If you do not populate a value for "Work Location" for Joe Smith, then Everbridge Suite does not add "Work Location" to Joe Smith's Contact Record.

Add a Field

To add an **Additional Information** field:

1. Click **Add** at the top of the interface. The **Add Fields** pane appears. The bottom pane shows the existing Additional Information fields.
2. Fill out the fields:
   - **Name** - The desired name for the custom field as users will see it in the Contact Record under **Contacts** or in the Member Portal.
   - **Data Type** - The data type for the custom field.
   - **Display Format** - The display format for the custom field.
   - **Optional** - If the **Display Format** is a list, use the boxes provided to enter all allowed values. Click **Up** and **Down** to customize where the value

appears in the list.



3. Click **Add another item** to add additional fields.
4. Click **Save.**

Edit a field

To edit a field:

1. Click the pencil in the field's row.
2. Make any changes to the field.
3. Click **Update** to save your changes or **Cancel** to undo your changes.

NOTE: You cannot change the **Data Type** or **Display format**.

Delete a field

To delete a field:

1. Click the **Trash Bin** in the field's row.
2. Confirm the deletion.

NOTE: If contacts have an assigned value for this field, then the application will remove those values from their Contact Records.

Reorder the fields

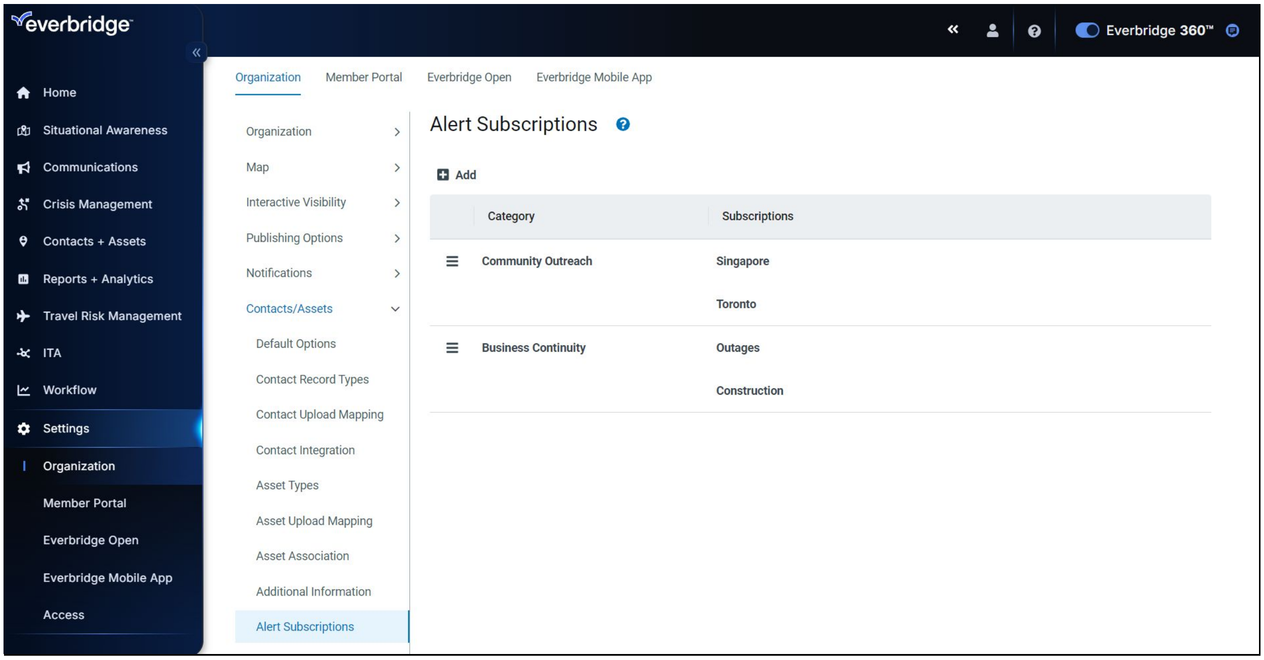
To reorder the **Additional Information** fields:

1. Toggle on **Enable customized sequence** to reorder the existing **Additional Information** fields. The **Additional Information** fields are numbered sequentially.
2. Drag and drop a field to reorder it.
3. Select **Sequence.**
4. Drag the field to its new order.

When adding a contact, the **Additional Information** fields are displayed in the chosen order.

Alert Subscriptions

You can add types of Notifications to which the contact can subscribe from **Settings** > **Contacts/Assets** > **Alert Subscriptions**. For example, you could offer to notify contacts about several types of traffic conditions in your area.



To add a new custom Alert Subscription value:

1. Click **Add**. The **Custom** radio button is selected by default.
2. From the **Type** field, select the type of field to add from the drop-down list:
   - **Custom** - Can have any values you choose. Type your values, as needed. Select **Add another item to add additional values**. Optionally, click either **Sort: Alpha A-Z** or **Alpha Z-A.**
   - **Weather** - Offers a list of predefined values for different weather conditions. To add Weather subscriptions, see Setting Up Your Organization for Automated Weather Alerting in the SMART Weather Alerting User Guide.
3. Type a name for the **Alert Subscription** field. This name is shown on the Member Portal page when the contacts are making their selections.
4. Enter a value.
   - To enter more than one value, click the link: **Add another item**, and continue to enter values as needed.
   - To sort your values, click either **Sort: Alpha A-Z** or **Alpha Z-A.**
5. Click **Save.**
6. Optionally, reorder the categories by dragging the row to its location.

To edit a field, click its name in the list. Click in a text box to edit the name or values. Click **Save**.

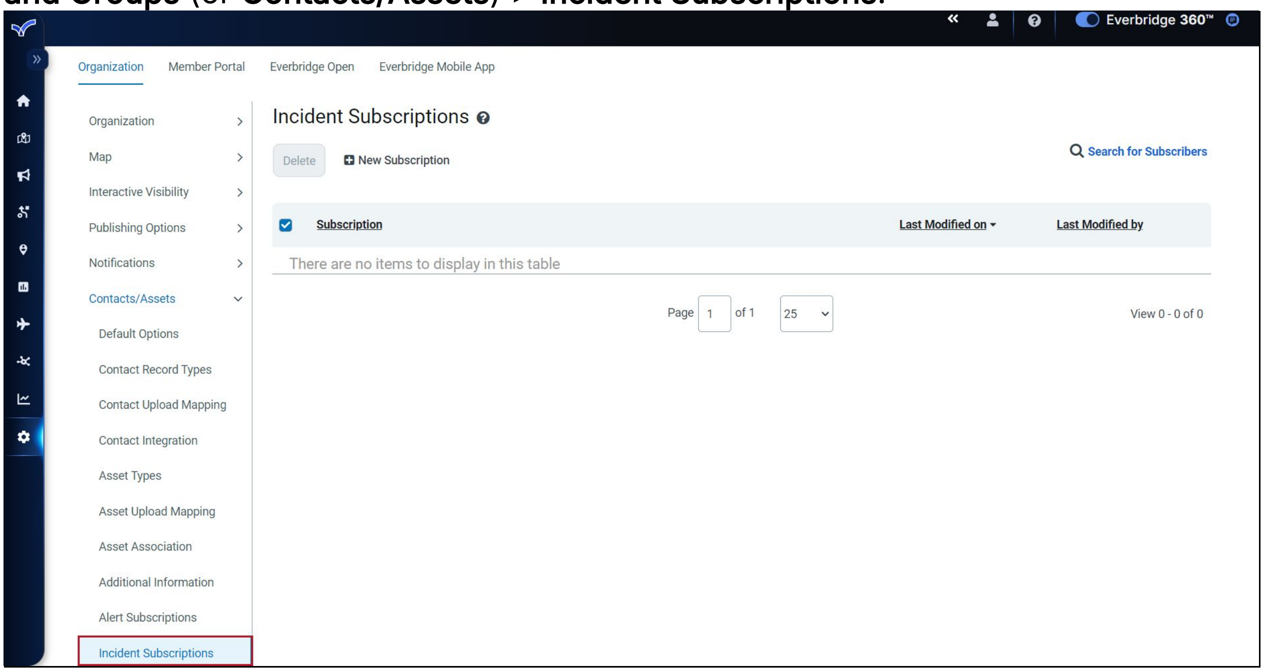
Remove Alert Subscription

To remove an Alert Subscription, click the **Trash Bin** from its row in the list. If you click the Trash Bin of a Category, all subscriptions are also removed. Or, click only the Trash Bin of the subscription to be removed.

Incident Subscriptions

Incident Subscriptions allow recipients (contacts) to proactively subscribe to Notifications related to issues and/or areas of interest to them. Incident Subscriptions are tied to the Incident Communications module and utilize Incident Variables as part of the selection criteria. A particular subscription with different preferences is a "combination."

Incident Subscriptions can be configured from **Settings** > **Organization** > **Contacts and Groups** (or **Contacts/Assets**) > **Incident Subscriptions**.



In a single subscription, you can create multiple combinations of Incident variables and subscribe individual contacts and/or groups to a specific combination. When an Incident is created, individuals who have opted-in to the specific combination criteria will receive a Notification.

You can optionally expose the Incident subscriptions to their Member Portal for self-service purposes.

Settings

About Subscriptions

You can create, view, and delete the Incident subscriptions from the Manager Portal.

To create a subscription:

1. Select **New Subscription** above the Subscription table.
2. Specify a name for your subscription.
3. Click **Save**.

After the subscription has been created, you can create a combination by specifying a mix of variables for the subscription.

About Combinations

The supported variable types are:

- TextBox
- Single selection
- Multiple selection
- Existing object name

Up to 10 unique variables can be in a single subscription.

- For a text box, select **Equal to**, **Contains**, or **Starts with**, then type the value you want to use. (For example, Starts with: Building.)
  - **AND/OR** does not apply to the TextBox variable.
- For a single selection variable, it is treated as a multiple selection variable.
- For a multiple selection variable, you can select one or more of the options.
- For an existing object name, select the values.

Inside one combination, the relationship between variables is "AND", while inside one variable, it is "Or". For example, if the member selects **Location = "Burlington, Pasadena"**, **Priority = P1**, **Services = Email**, then that user wants to receive the alert from Burlington, P1, and Email, or Pasadena, P1, and Email.

Between combinations, the relationship is **Or**.

The resulting users are the **exact match**. That is, if the user has specific preferences, that user will not receive the alert that occurs at Burlington without other attributes.

To create a new combination:

1. Choose **Select Variables**. This step is only required for the first combination; subsequent combinations will use the same variable set.
2. Select up to 10 Incident Variables from the list.
3. Click **Save**.
4. For each variable, specify the set of values or criteria you want to be notified about.

    - The default value for a single selection or multi-selection variable is **Any**.
    - You cannot create a combination with all variables set to **Any**. One variable in the combination must have a value selected.
5. Select the Subscription Type:
    - **Admin Managed** — a combination that the Administrator predefines and can publish to the Member Portal, allowing members to subscribe to them. The Administrator can also opt-in individual contacts and groups to the combination directly from the Manager Portal.
    - **Member Managed** — a template that the Administrator pre-sets and can publish to the Member Portal, allowing the members to create their own combination. The created combination is editable and can be deleted from the Member Portal. The Administrator cannot opt-in individual contacts and groups to the combination template from the Manager Portal.
6. Select the edit option for your combination:
    - **Make editable** — Any subscriber to the combination will be able to edit the list of values of each of the Incident variables from the Member Portal. **Make editable** is disabled for **Member Managed** combinations. However, all subscriptions created by a Member from the template are editable from the Member Portal.
    - **Restrict Member-selectable values to those chosen above** — When selected, when the Member edits a combination from the Member Portal, they can only select a variable from the pre-selected list of values set of the Administrator while creating the subscription combination. This option is only valid when the combination is editable.
7. Click **Add**.

In the Manager Portal, combinations appear at the bottom of the page. Click **Show Details** to display elements of the combination such as:

- If it was published to the Member Portal
- If it is editable or restricted
- Last Updated date and time
- The combination values.

Click **Hide Details** to view the Subscribers View link and the combined values.

At any time, Administrators can edit or delete combinations from a subscription. The Administrator can change the set of values or criteria for each variable, as well as the edit options. The subscription type cannot change after the combination is created.

The Administrator can edit combinations by the Administrator either from the **Subscription** page or a specific subscriber page.

- If edited from the **Subscription** page, the changes will apply to all subscribers.
- If edited from a specific subscriber page, the changes can be either applied to that subscriber or all subscribers.

About Subscribers

The Administrator can opt-in individuals or groups for a specific subscription combination. Subscribers will automatically be notified when an Incident is created and matches the conditions defined in the combination.

Members will also see the subscription combinations to which they are subscribed from the Member Portal.

To add a subscriber:

1. Select the subscription in the Subscription table to list the combinations.
2. In the **Subscriber** column, select **Add** or **View**.
3. In the **Manage Subscribers** dialog, search and select individuals or groups.
4. Click **Save**.

Publish to Member Portal

To manage the list of subscriptions visible by the members, publish them to the Member Portal. When published to the Member Portal, members can see the subscription combinations and select the ones they want to be notified about, or they can create their own combinations from previously created templates.

To publish a combination to the Member Portal:

1. Open your subscription from the Subscription table to access the list of combinations.
2. Select one or more combinations.
3. Select the **Publishing** menu.
4. Click **Publish to Member Portal**.

Remove from Member Portal

At any time, you can remove combinations from the Member Portal. However, they will still be visible to the members who are subscribed to them.

To remove a combination from the Member Portal:

1. Open your subscription from the Subscription table to access the list of combinations.
2. Select one or multiple combinations.

3. Select the **Publishing** menu.
4. Click **Remove from Member Portal**.

Restrict Visibility

By default, members of all groups will have access to the published combinations. You can limit which members can see a specific combination in the Member Portal based on the groups to which they belong.

To restrict the visibility of combinations in the Member Portal:

1. Click **Show Details** in the table header to display the **Published** column.
2. Select a published combination.
3. Click **All/Edit** in the **Published** column.
4. Select the group to which you want to give visibility to the combination.
5. Click **Save**.

Members outside the specified groups cannot see the published combinations in the Member Portal unless they are subscribers.

Click **Back to Subscriptions** to see your list of Incident subscriptions.

After your Incident subscriptions are created, in the **Contact** section of the Incident template, you can select the Sending Option: **Send to Incident subscribers** so that your Incident includes contacts in the template, as well as Incident subscribers set up in Settings.

Member Portal

The following are notes about the Public Member Portal and Private Member Portal:

- Subscriptions work for both the Public Member Portal and the Private Member Portal.
- Members can choose their Incident Subscription combination during the registration process.
- Members can opt in or opt out of any subscriptions.
    - After the member opts out of the combination, the combination remains displayed on the page, but the member no longer receives Notifications for that combination criteria.
    - The member can re-opt in at any time.
- Members can delete a subscription unless the Administrator published it to the Member Portal.
    - After the member deletes the subscription, it will be hidden from the Member Portal for that member only.

    - The subscription will not be deleted from the system unless there are no other subscribers.
- All subscription combinations to which the member is subscribed are displayed in the Member Portal.
- Members can create their own subscriptions if the subscription is a **Member Managed** subscription type.
    - Think of the subscription as a template. The member can create a subscription in the Member Portal from this template. Any subscription created by the member can be edited or deleted.
- Members can edit the subscriptions to which they are subscribed; if the subscription is a **Member Managed** subscription type, or if the subscription is an **Admin Managed** subscription type that the Administrator makes editable.
- A subscription combination subscribed to a group cannot be edited by the members.

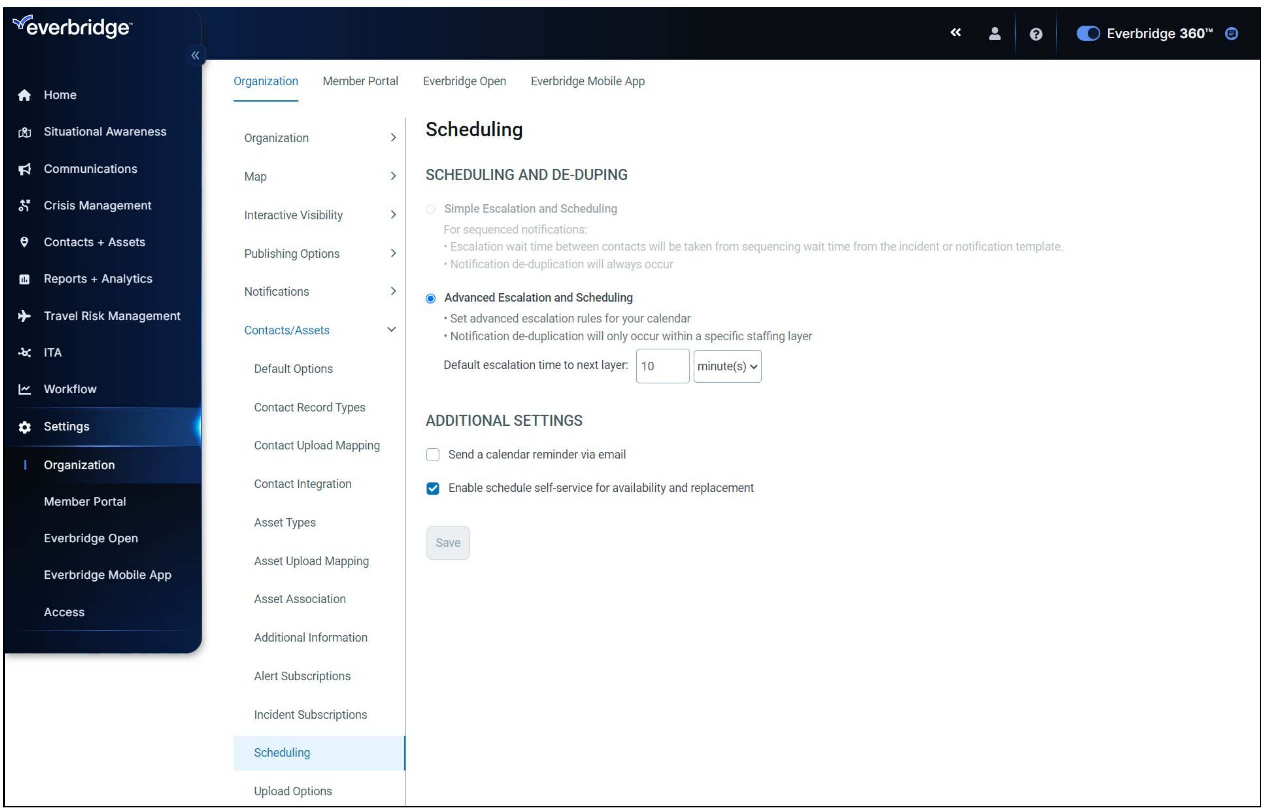
In this example, the Administrator creates a combination. Select or clear a checkbox next to a combination name to opt in (subscribe) or opt out (unsubscribe). The member can edit the combination to which they opt in.

Scheduling

When selecting the **Send a calendar reminder via email** checkbox, choose the following prior to the start of a shift:

- Number: 1-100. The minimum number is 1.
- Days or Hours
- The minimum time is one hour.

Also, select whether to allow contacts to opt out of reminders. By default, contacts can opt out of reminders from the Member Portal.



Time applies to all calendars and layers where the **On-Call Reminder** is enabled.

Disabling **On-Call Reminder** removes all On-Call Reminder configurations made for calendars and layers.

Select the checkbox to enable schedule self-service for availability and replacement.

Refer to the Scheduling User Guide for more details.

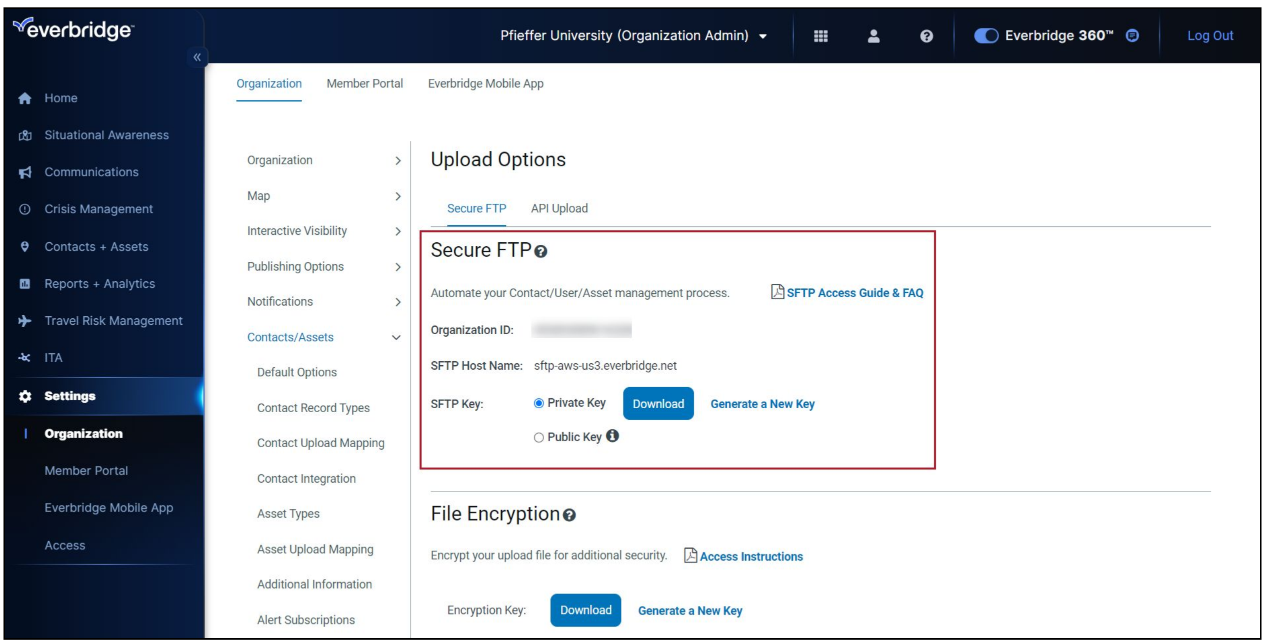
Upload Options

There are several ways to add contacts to Everbridge Suite from **Organization Settings** > **Contacts and Groups** (or **Contacts/Assets**) > **Upload Options**:

- Fill in a form for a single contact and save it to the database.
- Use a data file containing many contacts and upload it to the database.
- Configure another system to automatically add a file containing a number of contacts and upload it to the Everbridge database.

Secure FTP

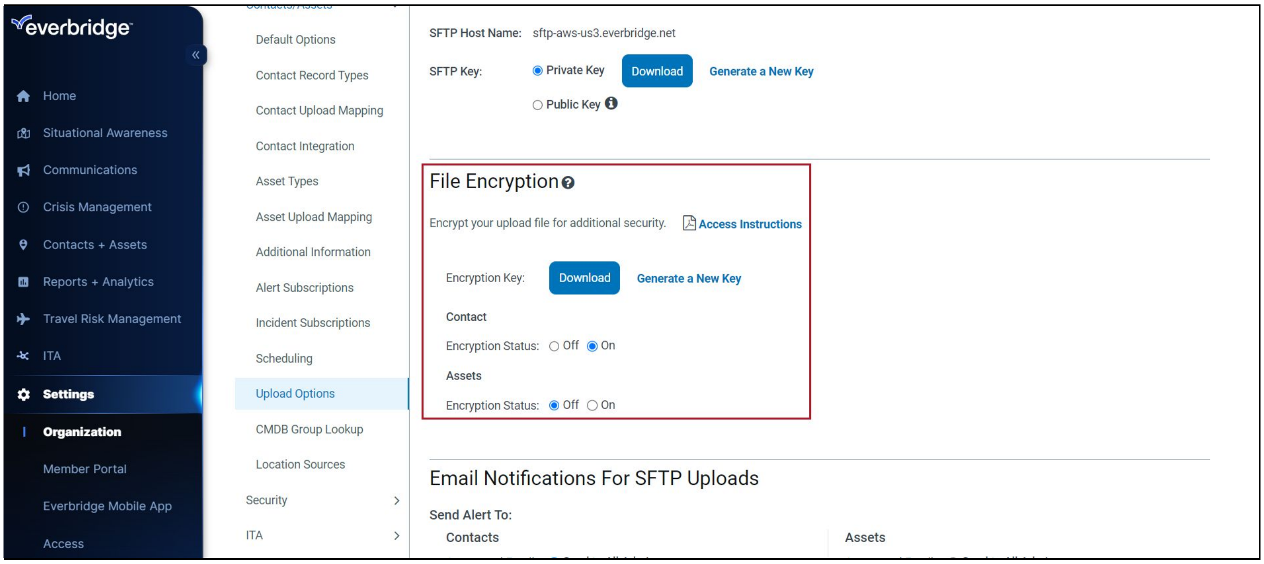
Most Organizations use bulk upload methods to add and manage many contacts at once. One way to automate the upload is through the Everbridge Manager Portal. You configure your system to add a contact upload file in the Everbridge format. You then script or schedule software that supports **Secure File Transfer Protocol** (SFTP) to upload your file to Everbridge.



Using an automated system saves time and helps to prevent errors. You can use the Secure FTP software to manually upload files. This allows you to test your connection to Everbridge and make sure that your system is configured properly. If you are going to upload files manually, there is no advantage to using Secure FTP software instead of uploading through the Manager Portal.

File Encryption

File Encryption provides a standard encryption method (such as PGP) to generate encryption keys. The same encryption key can be used for both Contact and Asset uploads. The encryptions can be utilized together, separately, or not at all.



By configuring your computer system and Secure FTP software to work together, they can automatically add and install contact data updates. 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.

FTP instructions are not provided in this document. If you have questions about using FTP, contact your IT department or your Client Services representative.

> **NOTE:** Only **.gpg** files are supported for Asset Data.

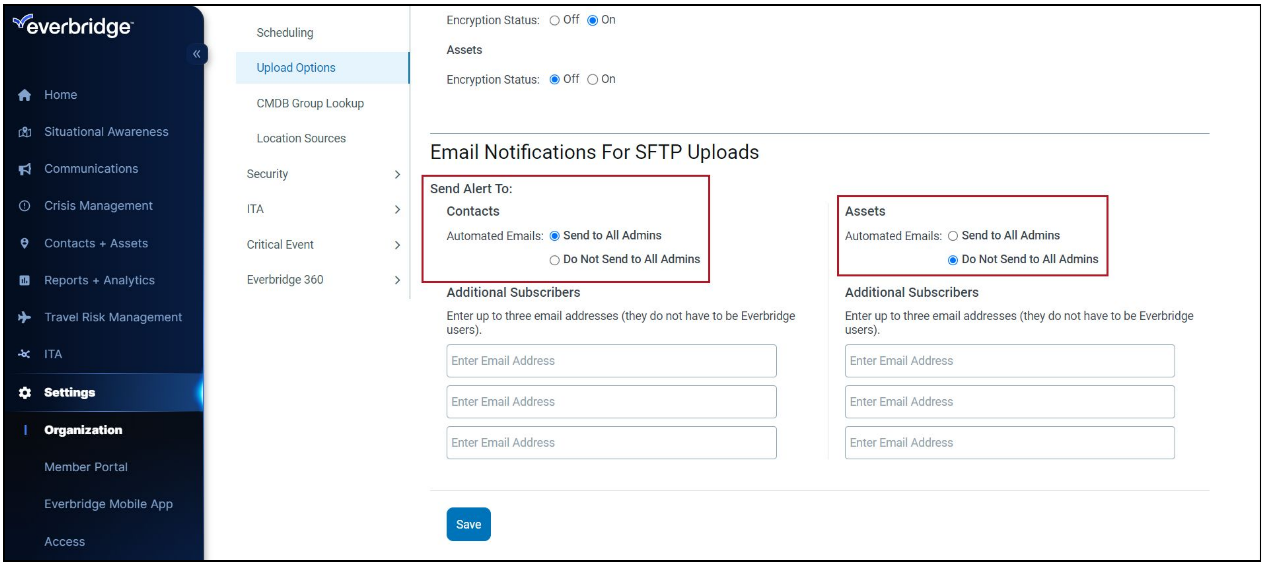
To use File Encryption for additional security:

1. From the **Organization** tab, select **Contacts and Groups** or **Contacts/Assets** > **Upload Options**.
2. From the **File Encryption** pane, set the **Encryption Status** radio button to **On**.
3. Click **Download Access Instructions**.
4. Save the file to your desktop.
5. Follow the instructions from the downloaded file.

> **NOTE:** If encryption is turned on in the Secure FTP settings and you want to upload a file that is not encrypted, you need to turn off encryption in the settings, then upload the file, and turn encryption back on.

Email Notifications for SFTP Uploads

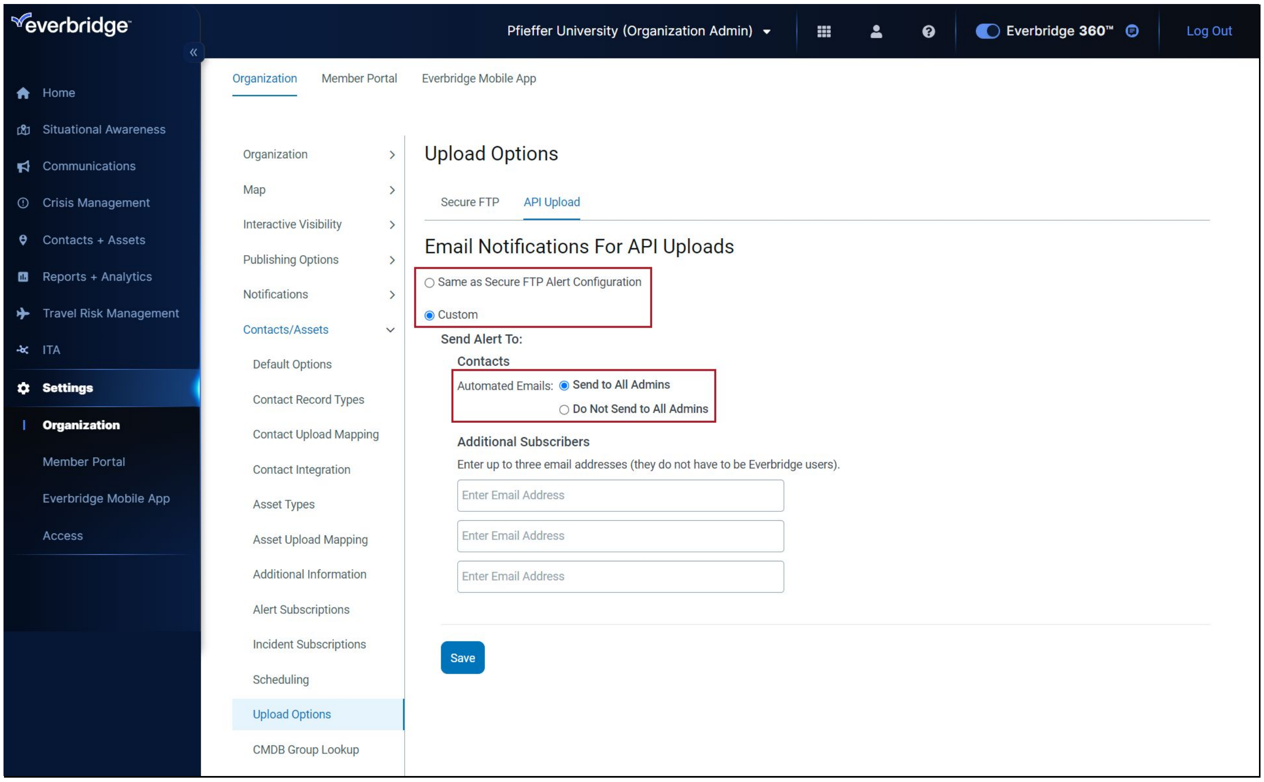
Organization Administrators can configure which email addresses are subscribed to receive notifications when a new SFTP is complete. You can select **Send to All Admins** or **Do Not Send to All Admins**, which allows you to manually add additional subscribers.



FTP instructions are not provided in this document. If you have questions about using FTP, contact your IT department or your Client Services representative.

Email Notifications For API Uploads

Organization Administrators can specify which email addresses will receive a notification whenever a new file is uploaded via API.



They can use the following options:

- Same as the Secure FTP Alert configuration
- Custom
  - Contacts:
    - Send to All Admins
    - Do Not Send to All Admins
  - Additional Subscribers: Enter up to three email addresses. Note that they don't have to be Everbridge users.

Groups

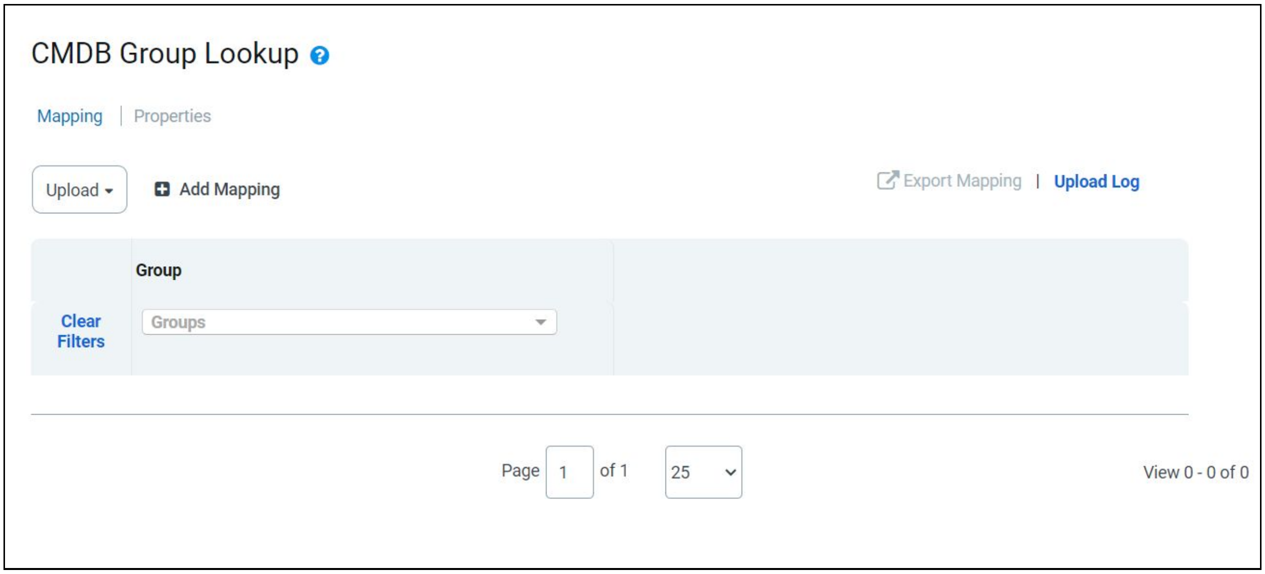
The **Groups** section is visible only if **Sequenced Groups** is enabled for your Organization. Sequenced Groups allow contacts to be put in a specific order in designated groups.

In the **Contacts** > **Groups** page, you can order the contacts of a specific group. When creating a Notification, you can select this group, turn on Sequencing in the Notification, and enter a wait time between contacts. Otherwise, leave Sequencing off to use it like a standard group.

> **NOTE:** The Sequenced Groups feature is available only if your Organization has **Incident Management** enabled.

CMDB Group Lookup

For use in Incident Templates, the **Configuration Management Database (CMDB) Group Lookup** feature automatically identifies the groups to notify based on selected Incident Information variables. Administrators can find this page at the Organization level from **Settings** > **Organization** > **Contacts/Assets** > **CMDB Group Lookup**.



To begin, first define a set of properties and their values, then create a mapping between groups and their properties or values.

When configured in an Incident Template, the group defined in the mapping is automatically targeted when the combination of properties and values matches. Each property is an **AND** operation, and each value in a property is an **OR** operation.

For information about how to use this feature in Incident Templates, read the Adding Information Variables, Form and Message, and Using Incident Rules sections of this guide.

Properties

Per group, you can define up to 15 properties, and each property can have a maximum of 15,000 values. Each property and value name can be up to 260 characters.

You can create properties manually, in a CSV upload, or via the public REST API.

Create properties manually

To create properties manually:

1. From the **CMDB Lookup** page, click **Properties**. The list of properties and their values appears.
2. Enter a property name. Property names are case insensitive and must be unique.
3. Enter the property's corresponding values and press ENTER between each value. Property values are case insensitive.
4. Optionally, to delete an existing property, click the Trash Bin next to its name and click **Yes** to confirm the deletion.

Edit properties manually

To edit properties manually:

1. Click the **Pencil** icon of the property.
2. Change the property name and property values, as needed.
    - Property names and values are case insensitive and must be unique.
3. Click **Save**.

> **NOTE:** If you change a property's name and that property is mapped to an **Existing Object Name** Incident variable, you must also update the **Existing Object Name** Incident variable.

Delete properties manually

To delete properties:

1. Click the **Trash Bin** of the desired property that you want to delete.
2. Click **Yes** to confirm the deletion.

> **NOTE:** If you delete a property that is used in an Incident rule, you must update that rule and any **Existing Object Name** Incident variables that use the property.

Add properties via a CSV file

To add properties and their values via a CSV file:

1. Navigate to the **Properties** tab and click **Upload**. A pop-up window appears.

2. In the pop-up window, click **Download Template** to download a template specific to properties. The file name will be `cmdb-properties-ORGID.csv`, where `ORGID` represents the Organization's ID.
    - Alternatively, you can use a blank spreadsheet and add each property as a column and each value as a row.
3. Replace the **Property** column headings in row 1 with your actual property names.
    - If you do not use all 15 properties, leave the unused properties blank, or remove the columns from the template.
4. Save the template with a unique CSV name.
5. After filling in the spreadsheet, click **Upload**, and then click **Upload** in the pop-up window that appears.
6. Select or drag and drop the CSV file and click **Upload.**
7. Scroll to the right to view all of the properties.

Upon upload, new properties and their values will be added. Values of existing properties will be updated as defined in the CSV. New values will be added and existing values that are not in the file will be removed.

If a property is used in an Incident rule, when values are updated, the rule is not affected.

There cannot be more than 15 properties, with each having up to 15,000 values. This means:

- If more than 15 properties are listed in the file, the import will fail.
- If a file contains duplicate properties, the import will fail.
- If the file includes more than 15,000 values for a specific property, that property will not upload, but the others will upload.
- If a file includes properties with improper characters for either name or values, that property creation will fail. However, the full import will succeed.

To view import logs and failures, click **Upload Log.**

NOTE: You cannot delete properties using CSV upload. if an existing property is not listed in the CSV file, it is ignored during the upload and remains unchanged. You can only delete properties manually.

Export existing properties and their values in a CV file

To export existing properties and their values in a CSV file, navigate to the **Properties** tab and click **Export Properties**.

You can export all existing properties to a CSV file named **cmdb-properties-ORGID.csv**, where ORGID represents the Organization's ID. You can use this file to upload changes to your properties. Each property appears in a separate column, with one row for each value.

Display upload history

To display the upload history:

1. Navigate to the **Properties** tab.
2. Click **Upload Log**. The status of the Organization's CSV uploads appears.
3. Click the View icon from the desired name to see the error log details.
4. Click **Back to Upload Log** to return to the **Upload Log** page.

Mappings

There are two methods to add mappings.

- Upload a CSV file of groups and their mappings.
  - When uploading mappings via a CSV file, you can also create properties and add values.
- Manually add a group and its mapping.

The groups must exist in your Organization. Per group, you can have up to 15 properties with a maximum of 15,000 values. Each property is an **AND** operation, and each value in a property is an **OR** operation.

> **NOTE:** There is no limitation on the number of rows being uploaded as long as the CSV file does not exceed 12 MB.

Upload via CSV file

To add a batch of groups and their mappings via a CSV file:

1. From **Upload**, download a template specific to CMDB Group Lookup, **cmdb_ORGID.csv**, where ORGIID represents the Organization ID.
   - You can also use a blank spreadsheet, and add your groups in Column 1 and each property as an additional column.
   - The heading of Column 1 must be **Group**.
2. Replace the **Property** column headings in row 1 with your actual property names.
   - If you already created properties, they will be listed in the template. You can add new properties as needed.

- If you do not use all 15 properties, leave the unused properties blank or remove the column(s) from the template.

3. As needed, fill in each row with group names and their corresponding properties.
4. Separate group names and property values using the pipe (|) character. Do not add any spaces before and after the pipe character.
5. Save the template with a unique CSV name.
6. Select **Upload** to upload a batch of groups into your **CMDB Group Lookup** table.
7. Select or drag and drop your CSV file and click **Upload**.
8. Scroll to the right to see all the properties, if needed.
9. Resize each column in the table. To do this, hover the mouse on the line in-between two columns, hold down the mouse button, and resize. Release the mouse button when you can see all values in the properties.
10. Proceed to **Properties** to filter each column.

Upload options

When uploading a mapping for the first time or during subsequent uploads, you are presented with three options:

Option	Description
Create/Update	• Add new properties, new values to existing properties, and new mappings. • Will not change any existing mappings. • Will not impact any existing Incident rules or Existing Object Name Incident variables that use your properties.
Override Mapping	• Add new properties, new values to existing properties, and new mappings. • Will delete all existing mappings and create a new one according to the file. • Will not delete any properties and will not impact any Incident rules or Existing Object Name Incident variables that use your properties.
Override Everything	• Replace all existing properties and mappings with new ones. • Will delete all existing properties and all existing mappings and create new ones from the file. ◦ All Incident rules using those properties will need to be updated. • Will not impact Existing Object Name Incident variables that use your properties as long as the new property names still match.

You cannot use these options to remove a property value. To remove unused property values, upload your properties from the **Properties** tab.

Manually Add Mappings

To manually add a group and its mappings:

1. Click **Add Mapping** to manually add an existing group and up to 15 properties and their corresponding values to each property.
2. From the **CMDB Group Lookup** page, click **Add Mapping**.
3. Select a group name from the **Group** menu.
4. For each property, select the values from the corresponding drop-down list. You can select all the values in the list, if needed.
5. Click **Save**. In the table, hover the mouse over a cell of multiple values to see all of them at once.

Edit Mappings

To edit group mappings:

1. Click the Pencil icon of the group.
2. Change the group filters, as needed.
   a. To remove an existing filter, click **X**.
   b. To add a filter, click the Down arrow and select the filter name.
3. Click **Save**. Optionally, click the Cancel icon to cancel the operation.

Delete Mappings

To delete group mapping:

1. Click the **Trash Bin** of the desired group name that you want to delete.
2. Click **Yes** to confirm the deletion.

> **NOTE:** Deleting a group mapping does not update the properties.

Retrieve Existing CMDB Group Lookup table

To get a list of the existing CMDB Group Lookup table, from the **CMDB Group Lookup** page, click **Export Mapping**. A CSV file is generated.

You can do any of the following in the file:

- Update the CSV file, as needed. You can enter multiple values separated with a pipe (|) character.

- Save the file and upload it to the desired Organization.

Display upload history

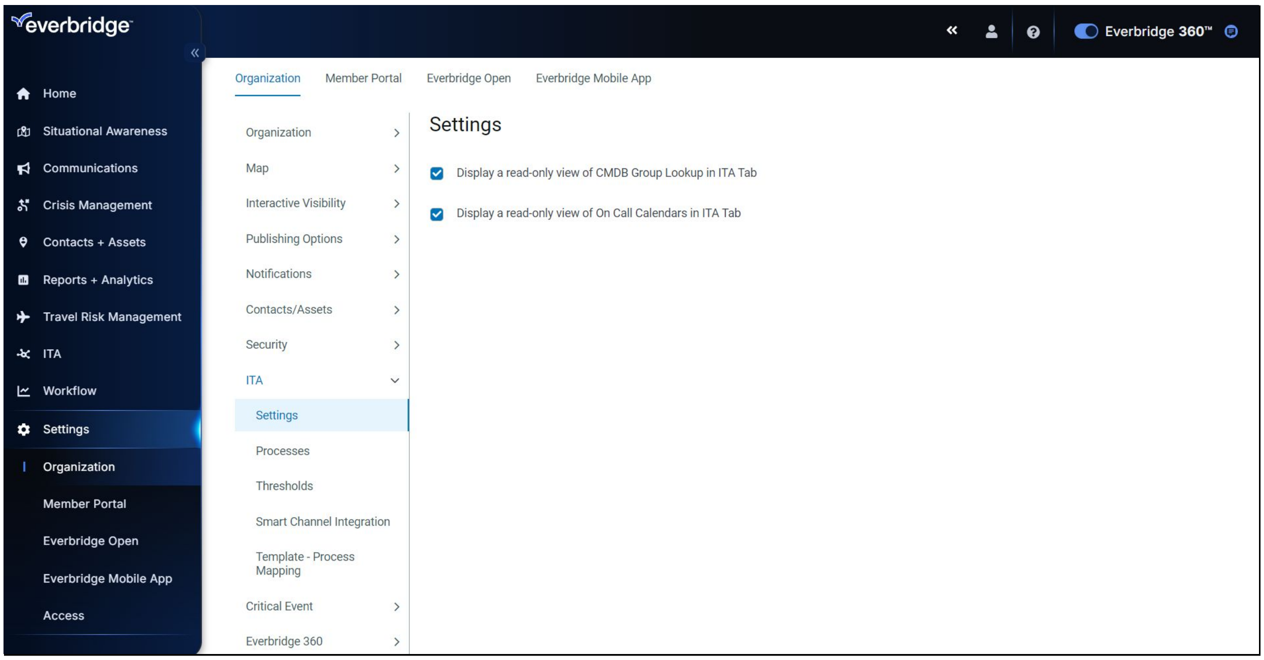
To display the upload history:

1. From the **CMDB Group Lookup** page, click **Upload Log.** The status of the CSV uploads for this Organization appears.
2. Select the **View** icon from the desired name to see the error log details.
3. Click **Back to Upload Log** to return to the **Upload Log** page.

Display a Read-Only View in the ITA Table

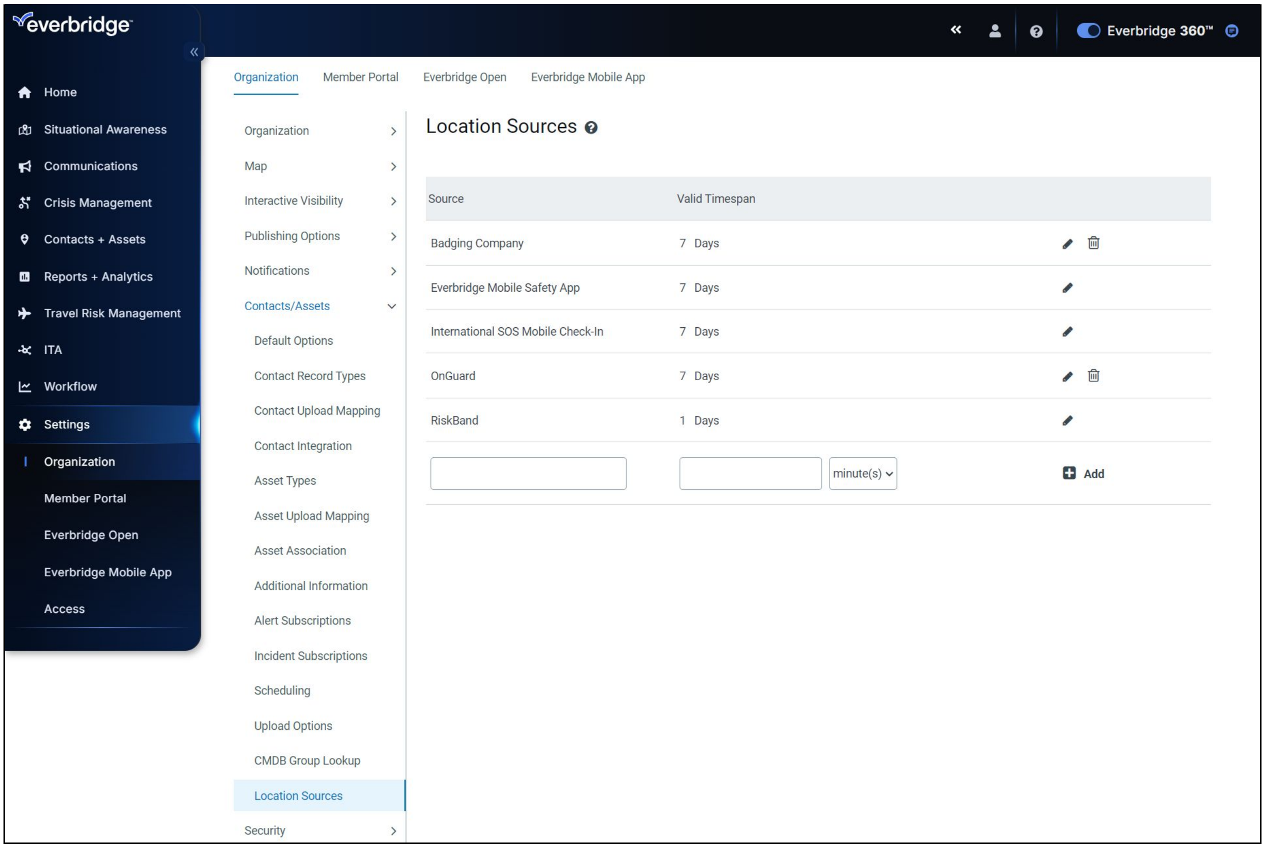
If your Organization has IT Alerting, you can display a read-only view of the CMDB Group mapping table.

To set this, navigate to **Settings** > **Organization** > **ITA** > **Settings** > **Display a read-only view of CMDB Group Lookup in ITA**.



Location Services

The **Location Services** page found at **Settings** > **Organization** > **Contacts and Groups** (or **Contacts/Assets**) > **Location Sources** allows you to configure sources from which dynamic locations for Contacts are 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.



Security

The **Security Settings** allow you to configure security settings, such as Single Sign-On, for your users.

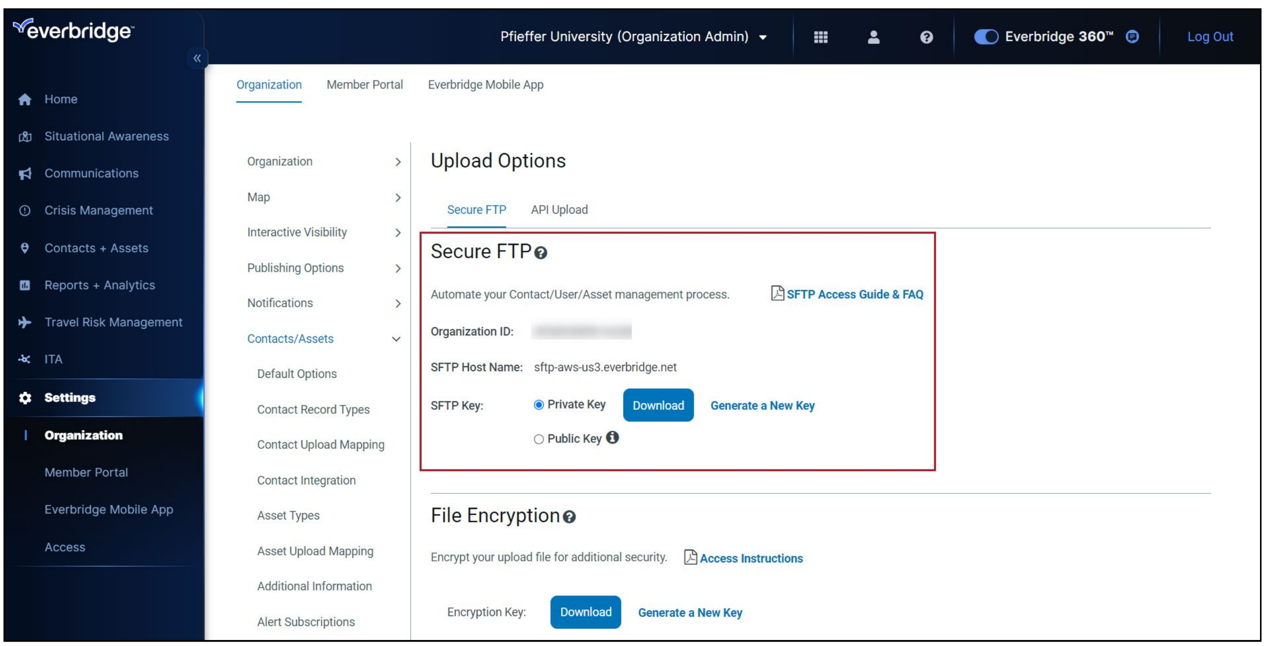
Upload Options

There are several ways to add contacts to Everbridge Suite from **Organization Settings** > **Contacts and Groups** (or **Contacts/Assets**) > **Upload Options**:

- Fill in a form for a single contact and save it to the database.
- Use a data file containing many contacts and upload it to the database.
- Configure another system to automatically add a file containing a number of contacts and upload it to the Everbridge database.

Secure FTP

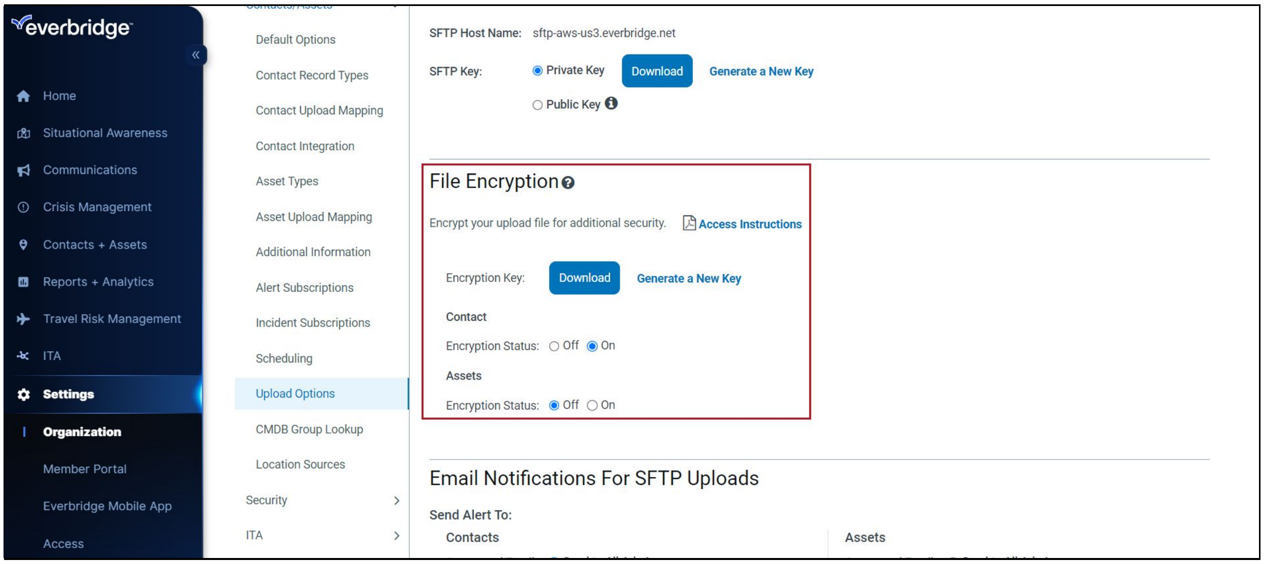
Most Organizations use bulk upload methods to add and manage many contacts at once. One way to automate the upload is through the Everbridge Manager Portal. You configure your system to add a contact upload file in the Everbridge format. You then script or schedule software that supports **Secure File Transfer Protocol** (SFTP) to upload your file to Everbridge.



Using an automated system saves time and helps to prevent errors. You can use the Secure FTP software to manually upload files. This allows you to test your connection to Everbridge and make sure that your system is configured properly. If you are going to upload files manually, there is no advantage to using Secure FTP software instead of uploading through the Manager Portal.

File Encryption

File Encryption provides a standard encryption method (such as PGP) to generate encryption keys. The same encryption key can be used for both Contact and Asset uploads. The encryptions can be utilized together, separately, or not at all.



By configuring your computer system and Secure FTP software to work together, they can automatically add and install contact data updates. 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.

FTP instructions are not provided in this document. If you have questions about using FTP, contact your IT department or your Client Services representative.

NOTE: Only **.gpg** files are supported for Asset Data.

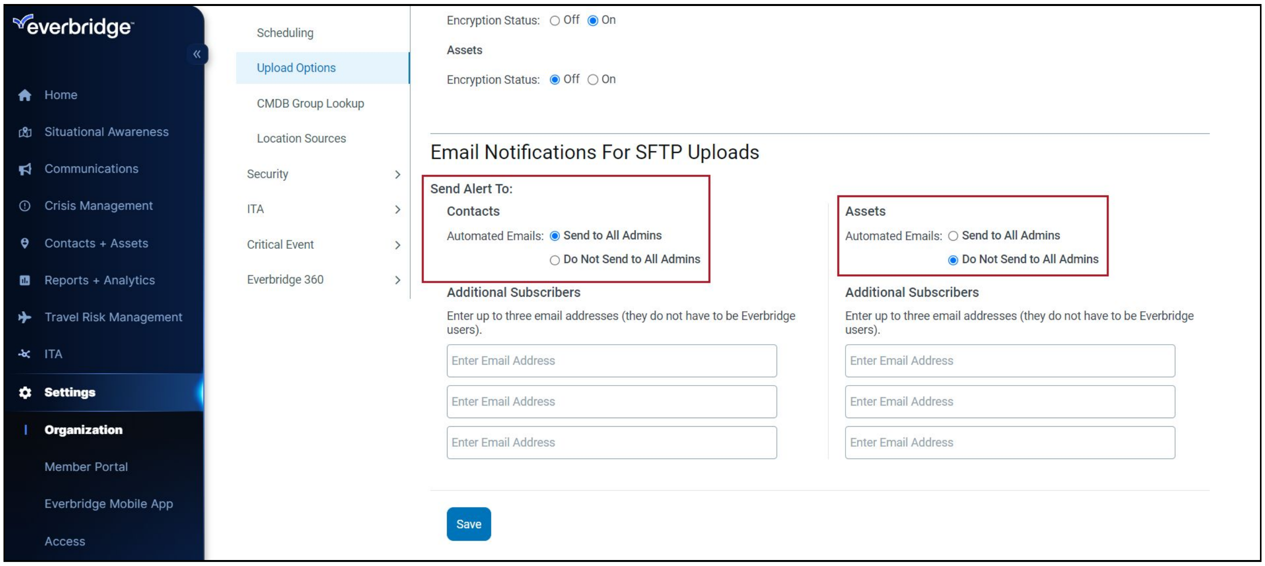
To use File Encryption for additional security:

1. From the **Organization** tab, select **Contacts and Groups** or **Contacts/Assets** > **Upload Options**.
2. From the **File Encryption** pane, set the **Encryption Status** radio button to **On**.
3. Click **Download Access Instructions**.
4. Save the file to your desktop.
5. Follow the instructions from the downloaded file.

NOTE: If encryption is turned on in the Secure FTP settings and you want to upload a file that is not encrypted, you need to turn off encryption in the settings, then upload the file, and turn encryption back on.

Email Notifications for SFTP Uploads

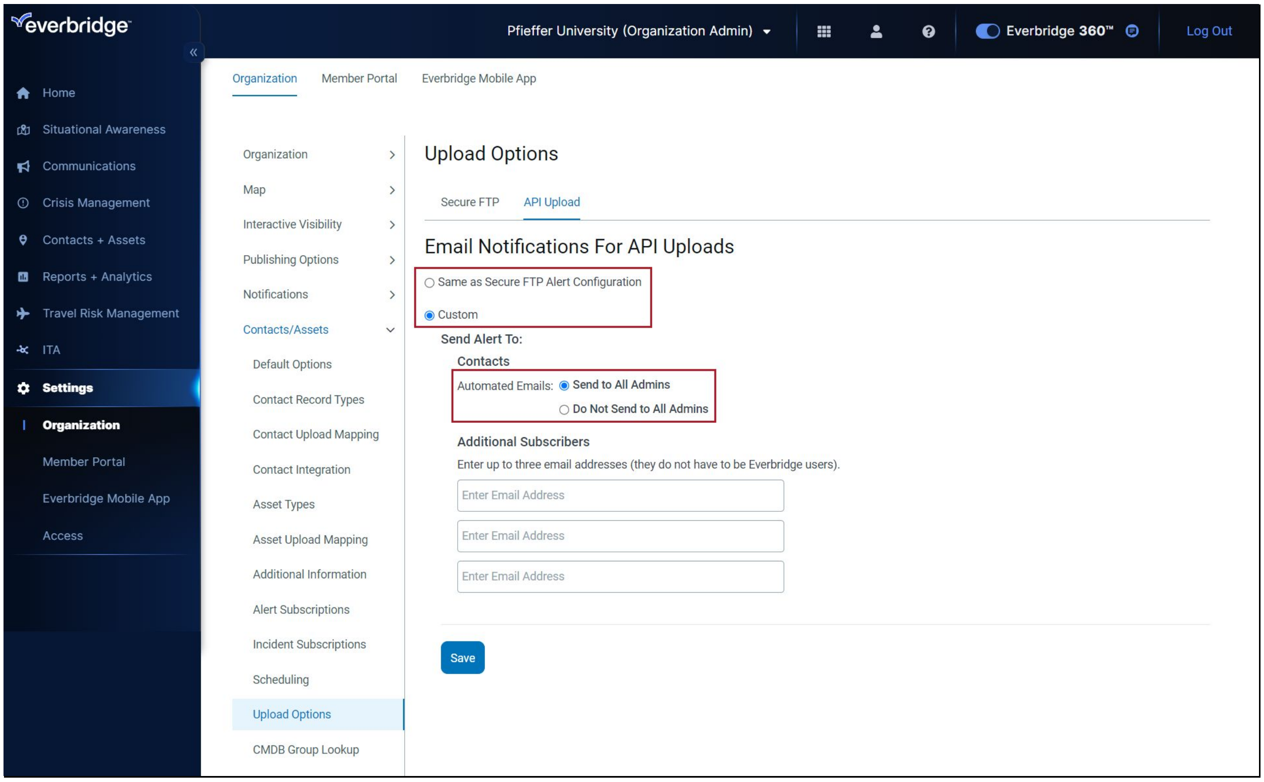
Organization Administrators can configure which email addresses are subscribed to receive notifications when a new SFTP is complete. You can select **Send to All Admins** or **Do Not Send to All Admins**, which allows you to manually add additional subscribers.



FTP instructions are not provided in this document. If you have questions about using FTP, contact your IT department or your Client Services representative.

Email Notifications For API Uploads

Organization Administrators can specify which email addresses will receive a notification whenever a new file is uploaded via API.



They can use the following options:

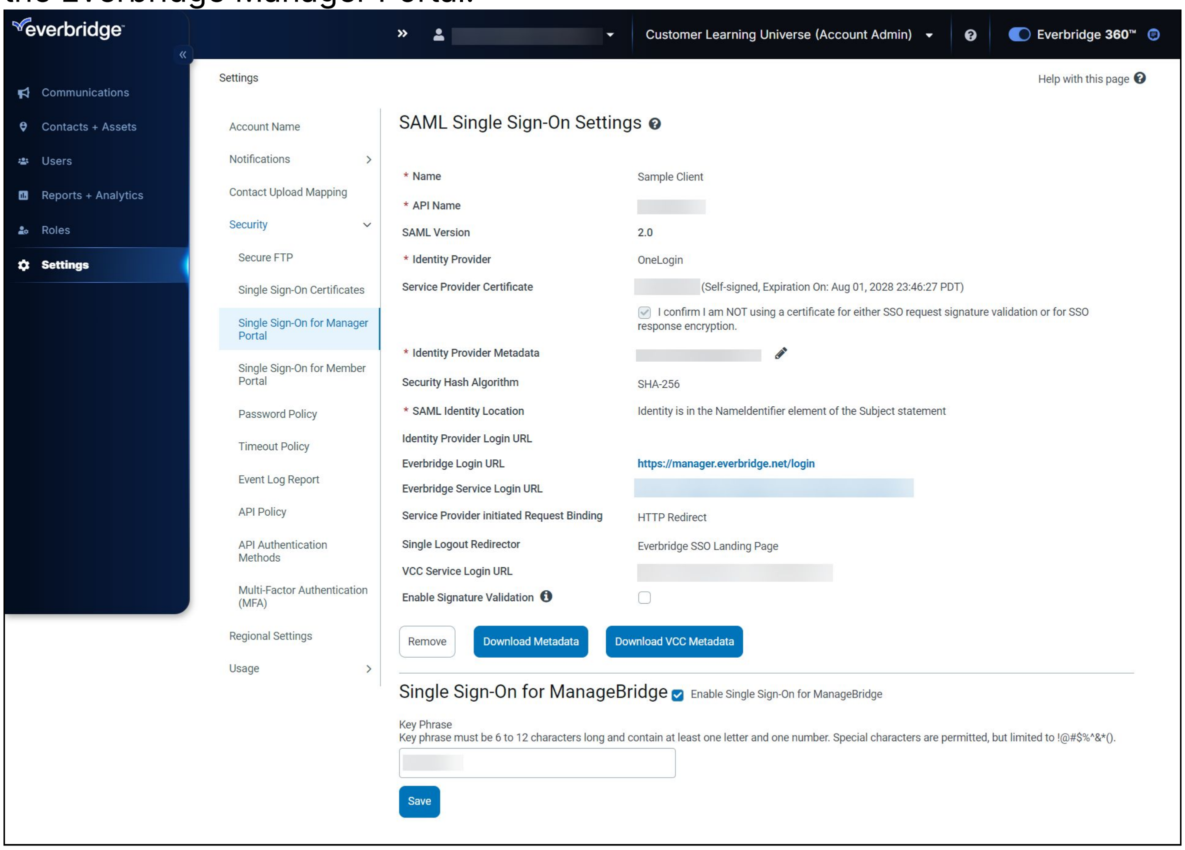
- Same as the Secure FTP Alert configuration
- Custom
  - Contacts:
    - Send to All Admins
    - Do Not Send to All Admins
  - Additional Subscribers: Enter up to three email addresses. Note that they don't have to be Everbridge users.

Single Sign-On for Manager and Member Portals

Single Sign-On (SSO) is an authentication scheme that allows users to log in to Everbridge Suite with a single ID and password. You can create Single Sign-On settings for the Manager Portal or the Member Portal using SAML (Security Assertion Markup Language) version 2.0.

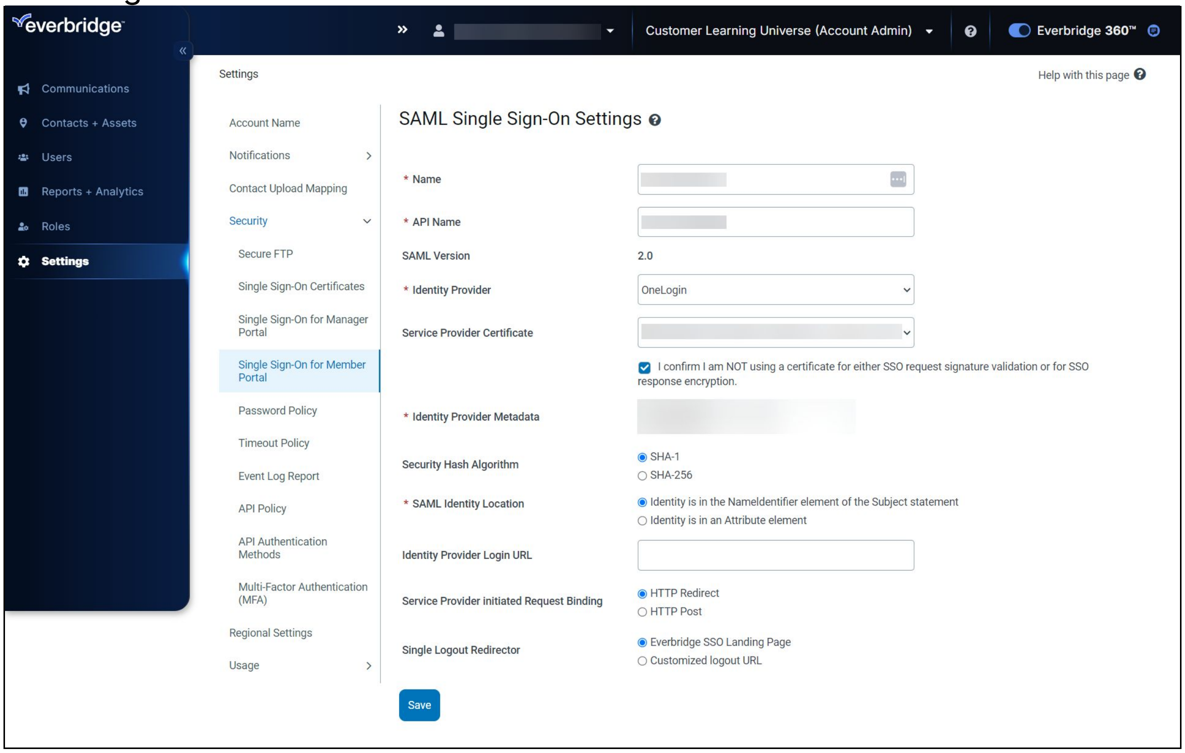
To access and configure your Account's Single Sign-On settings, navigate to **Settings** > **Security** in the Manager Portal and select either of the following:

- **Single Sign-On for Manager Portal** - Configure Single Sign-On settings for the Everbridge Manager Portal.



  - **Single Sign-On for ManageBridge** can also be enabled from this page. Set a key phrase of 6-12 characters long that contains at least one letter and one number.

- **Single Sign-On for Member Portal** - Configure Single Sign-On settings for each Organization's Member Portal.



> **NOTE:** Single Sign-On for Member Portal certificates can also be viewed at the Organization level from **Settings** > **Organization** > **Security** > **Single Sign-On for Member Portal**.

SAML Single Sign-On Settings

The following table displays the fields to configure Single Sign-On for your users. A red asterisk (*) indicates a required field.

Field Name	Description
*Name	A name for SSO settings.
*API Name	The unique name used by the API, we rely on this attribute to generate an Everbridge Login URL.
SAML Version	2.0
*Identity Provider	Name of your Identity Provider.
Service Provider Certificate	Choose the certificate you want to use, and confirm whether IDP will use it for SSO request signature validation or for SSO response encryption.

*Identity Provider Metadata	The XML file that uniquely identifies your SAML identity provider.
Security Hash Algorithm	The Hash Algorithm.
*SAML Identity Location	The location in the assertion where a user should be identified. Select either of the following: • **Identity is in the NameIdentifier element of the Subject statement** • **Identity is in an Attribute element**
Identity Provider Login URL	The URL where Everbridge sends a SAML request to start the login sequence.
Everbridge Login URL (auto-populated field, invisible at creation)	The web address for logging in to the Manager Portal directly using a username and password (otherwise known as a break glass account).
Everbridge Service Login URL (auto-populated field, invisible at creation)	The unique URL that users will access to log in to the Manager Portal using SSO.
Service Provider initiated Request Binding	• **HTTP Redirect** • **HTTP Post**
Single Logout Redirector	Everbridge SSO Landing Page
VCC Service Login URL (auto-populated field, invisible at creation)	The unique URL that users will access to log in to VCC using SSO.
Enable Signature Validation	If checked, will do mandatory signature validation for SAML Assertion and error out if it fails.

SAML Single Sign-On Settings for the Manager Portal

To configure Single Sign-On for the Manager Portal:

1. Fill out the necessary information in the required fields.
2. If you select the **Enable Single Sign-On for ManageBridge** check box, a **Key Phrase** field appears. You must enter a phrase that contains 6-12 characters and at least one letter and one number. Special characters are permitted, but limited to !@#$%^&*().
3. Click **Save**.
4. Click **Download** to download the SSO metadata and import it to the Identity Provider (IDP).
5. Add the users with SSO User IDs into Everbridge Suite.

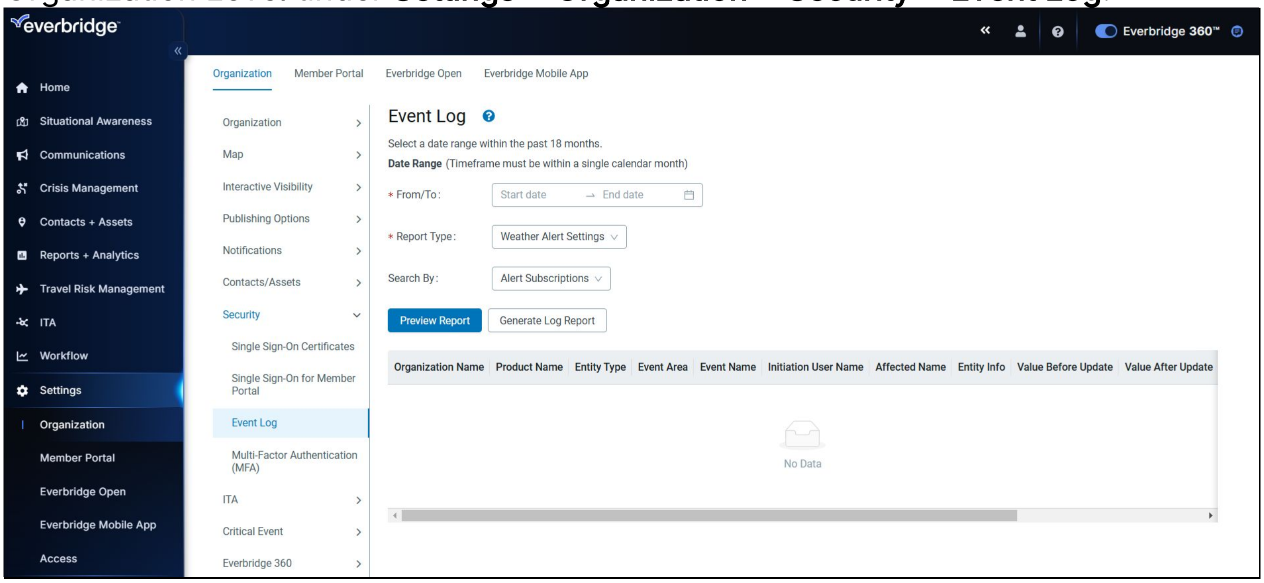
Single Sign-On Settings for the Member Portal

To configure Single Sign-On for the Member Portal:

1. Fill out the necessary information in the required fields.
2. Fill out the necessary information in the **Manage Single Sign-On for Organizations (Private Only)** fields at the bottom of the interface.
3. Click **Save**.
4. Click **Download** to download the Service Provider Metadata file for the Organization and import it to the Identity Provider (IDP).
5. Add the contacts with SSO User IDs into Everbridge Suite.

SMART Weather Event Log

Account and Organization Administrators can audit changes made to SMART Weather Quiet Periods, Alert Subscriptions, and Weather Thresholds at the Organization Level under **Settings** > **Organization** > **Security** > **Event Log**.



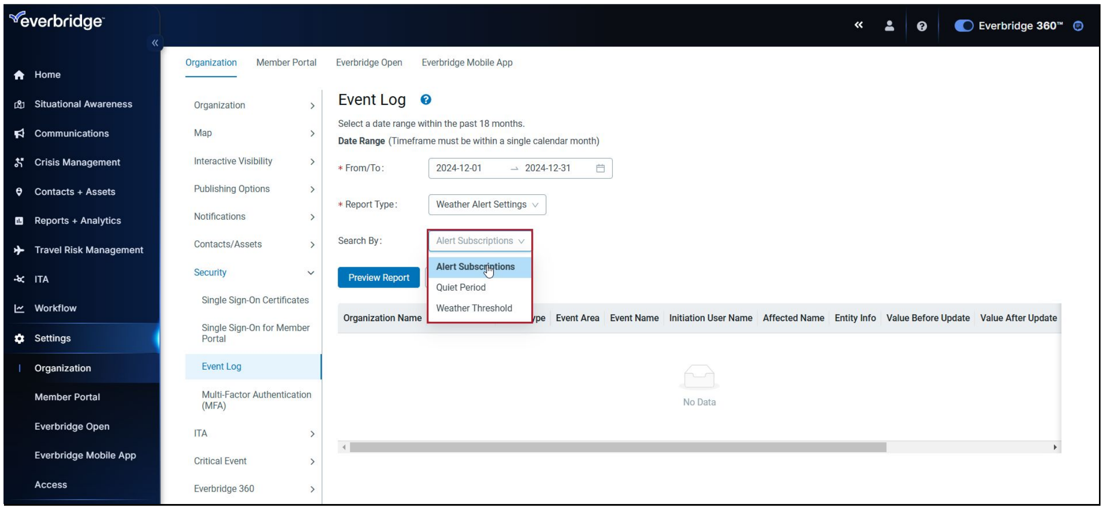
IMPORTANT: This is not to be confused with the Event Log found at the Account Level for auditing changes to Security Settings and Contact Management.

This Event Log displays the following data points:

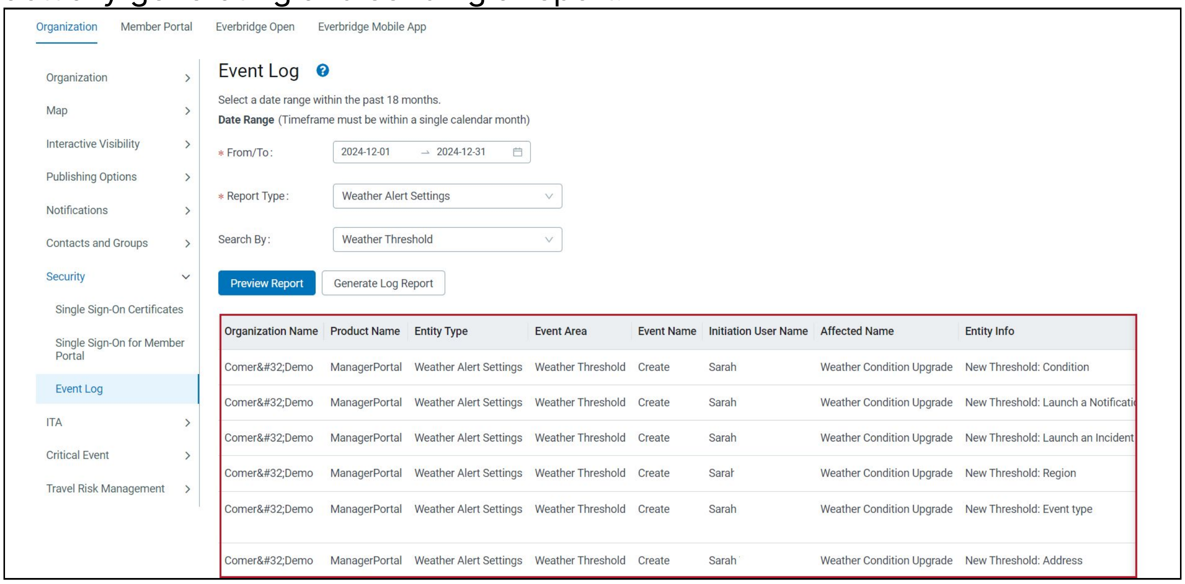
- Organization Name
- Product Name
- Entity Type
- Event Area
- Event Name
- Initiation Username
- Affected Name
- Entity Info
- Value Before Update
- Value After Update
- Origination IP Address
- Event Time
- Event Result

To create a SMART Weather Event Log:

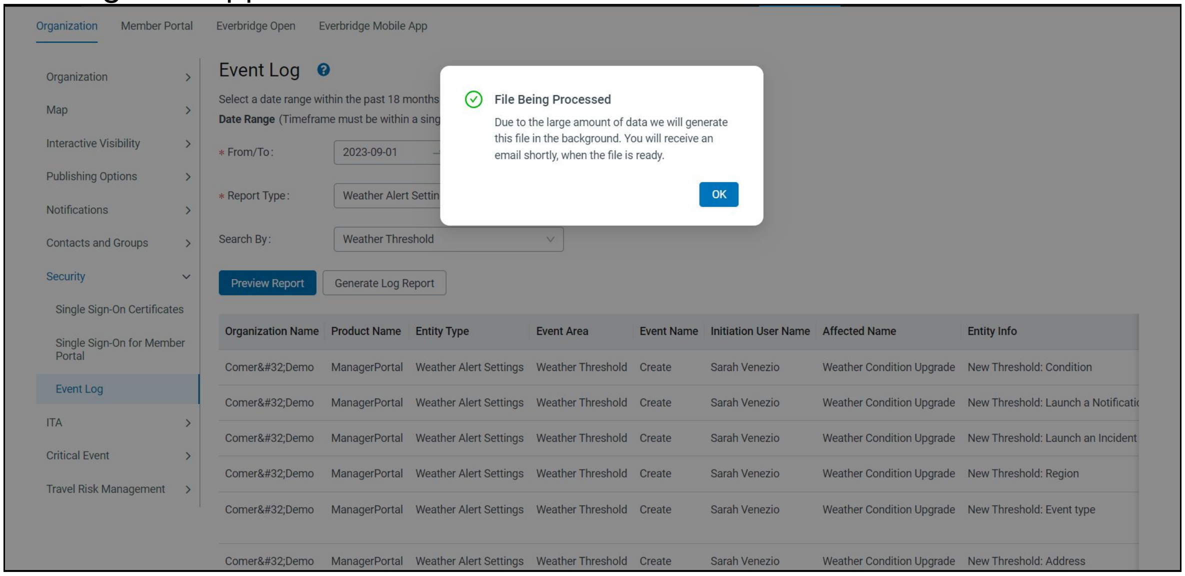
1. Choose a start and end date on the date picker. Note that the time frame must be within a single calendar month and within the last 18 months of the current date.
2. Select **Weather Alert Settings** under **Report Type**.
3. For **Search by**, select one of the following options based on the kind of data that needs to be audited:
    - Alert Subscriptions
    - Quiet Period
    - Weather Threshold



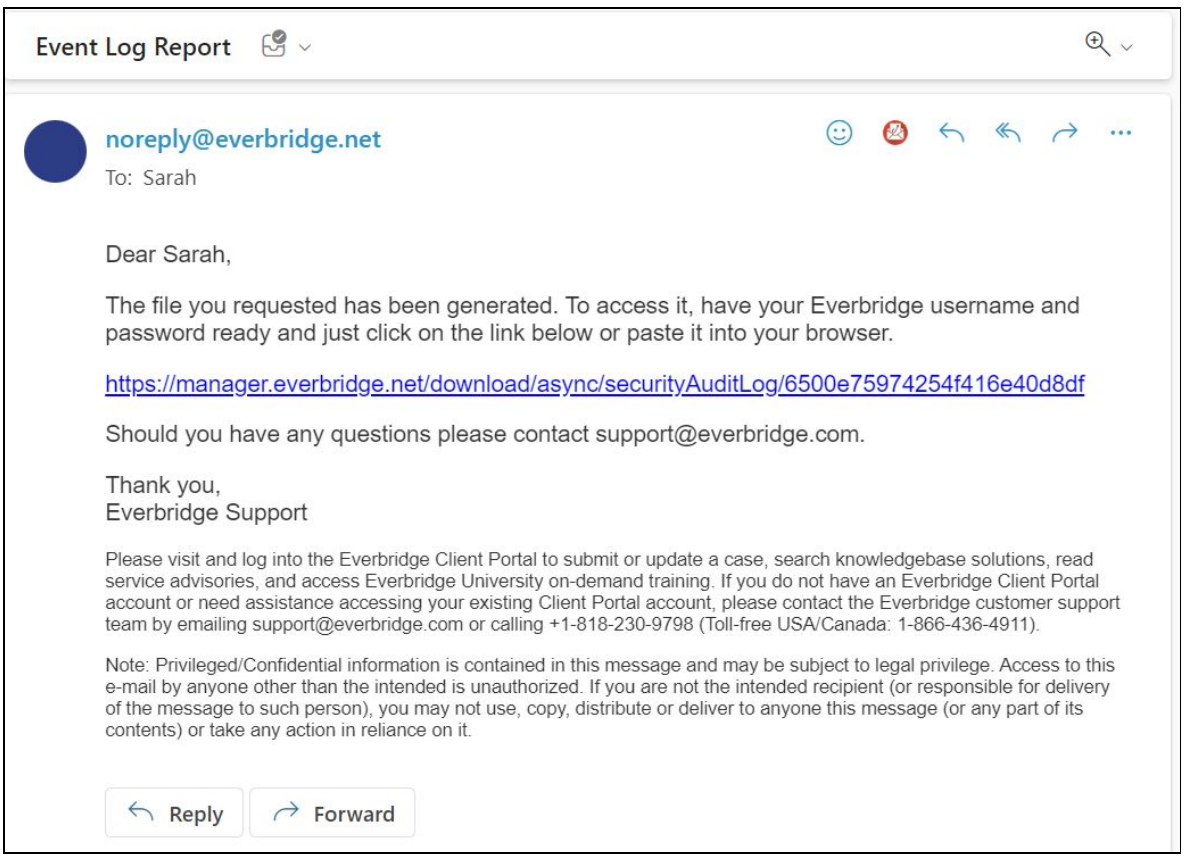
4. Click **Preview Report**. The table below will populate with the requested information, allowing users to review and make any needed changes before actually generating and sending a report.



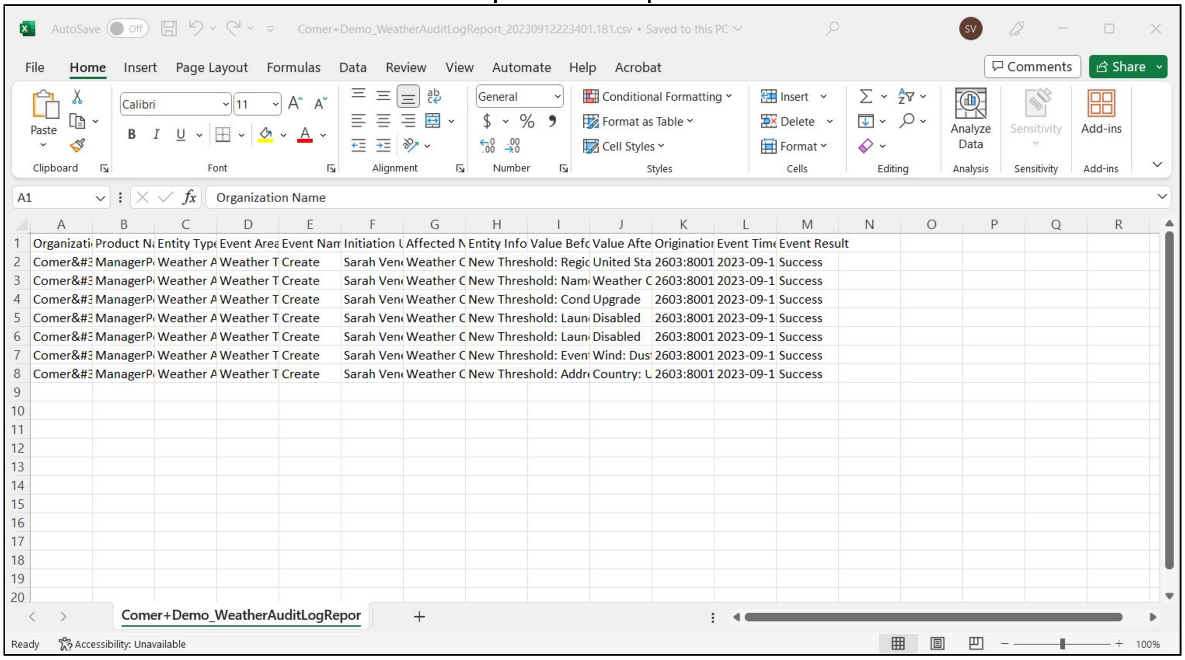
5. Once satisfied with the preview, click **Generate Log Report**. A confirmation message will appear.



6. The report will arrive in the requestor's email inbox as a link to the generated CSV file.



7. Click on the link in the email to open the report.



Single Sign-On Certificates

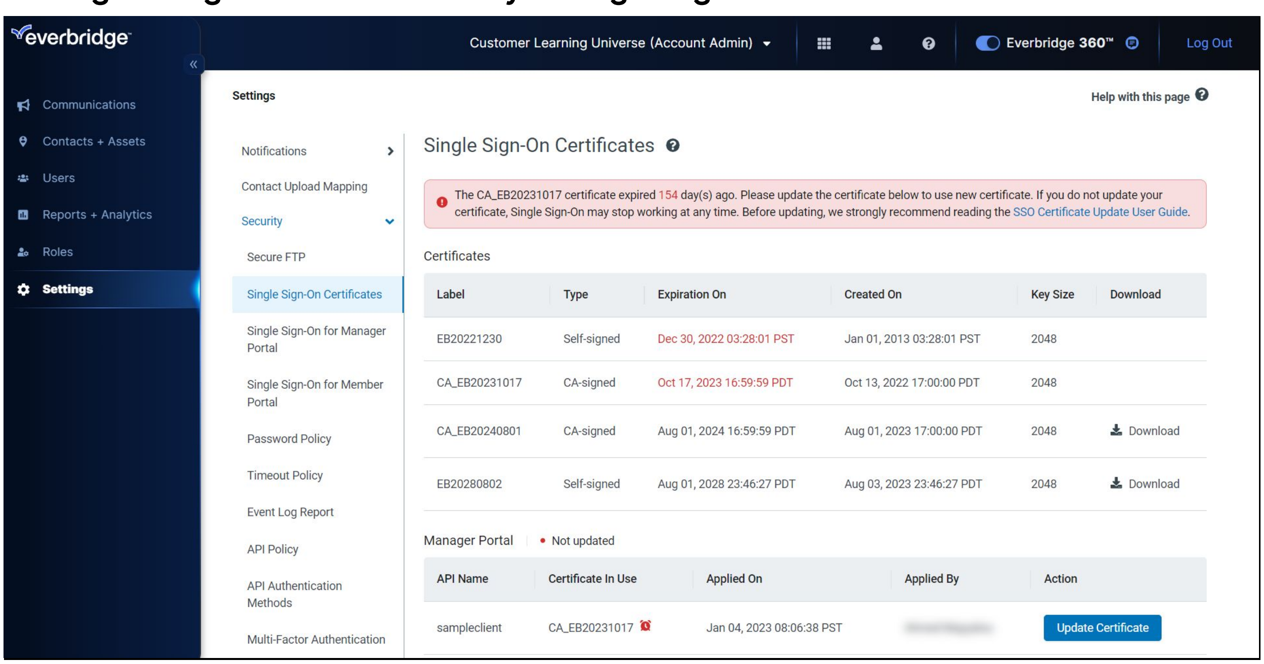
Single Sign-On certificates are used to sign the SAML request that the Service Provider (SP) sends to the Identity Provider (IdP) and/or to encrypt the assertion that the IdP sends back to the SP.

Although it provides additional security for applications that use the SAML authentication protocol, functionality to support signature verification and assertion encryption varies with different IdP types. You would need to check with a specialist in your IT department to confirm what your IdP supports and how.

All Single Sign-On certificates have a certain lifetime. A certificate should be rotated when it's about to expire. If your IdP uses a certificate for either signature verification or encryption and it expires before you rotate it, **users will not be able to use SSO to sign in until you replace it with a new one**.

Account and Organization Administrators can view and update (when applicable) the Single Sign-On Certificates for their account from the **Single-Sign-On Certificates page**. If the current certificate is due to expire, a warning banner will be displayed at the top of the page outlining when the expiration will occur.

Account Administrators can do this by selecting **Account Settings** > **Security** > **Single Sign-On Certificates**, while Organization Administrators can view Single Sign-On certificates for the Member Portal at the Organization level by selecting **Settings** > **Organization** > **Security** > **Single Sign-On Certificates**.



NOTE: Click Learn More here or from the banner warning for more details on updating your certificate.

Each certificate entry will include the following columns:

- Label
- Type (CA-signed or Self-signed)
- Expiration On
- Created On
- Key Size
- Download

When configured, if a certificate is due to expire, the **Manager** and **Member Portals** section of the page will appear with the **Update Certificate** button for the expiring entry. If not, will appear as “-“ or “Change Certificate” when there are other alternatives for certificates.

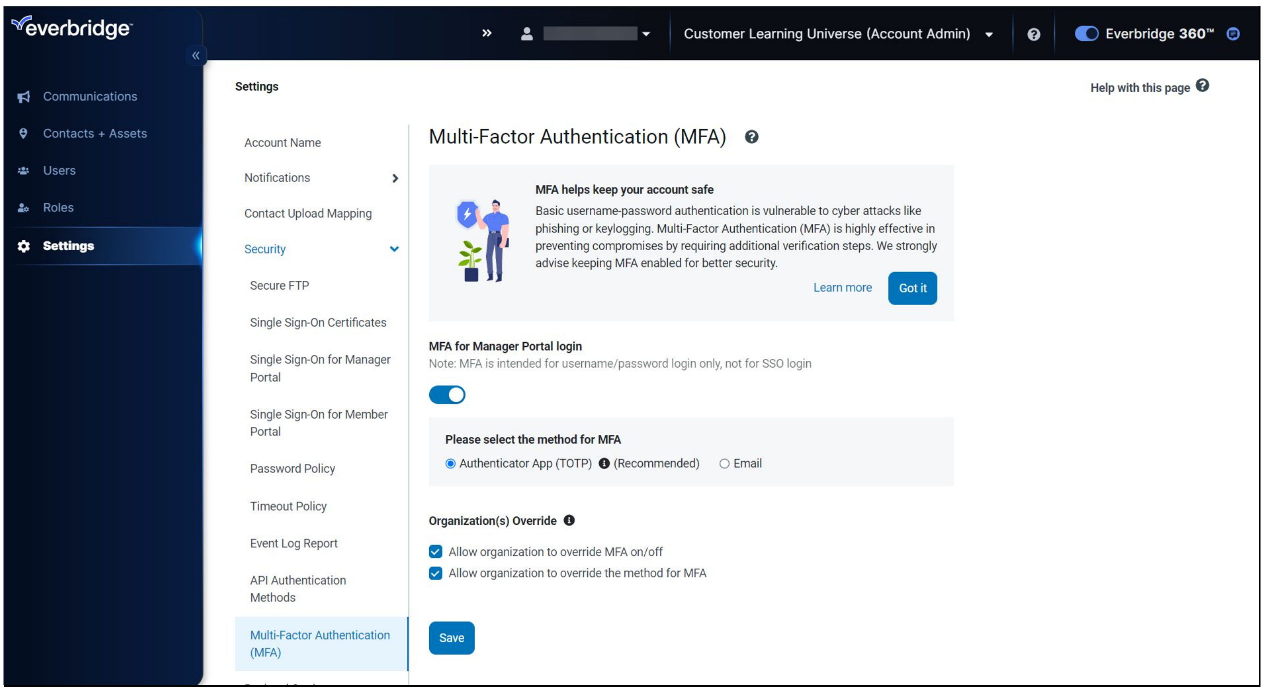
You can also see the following data in this section:

- API Name
- Organization (Only applicable for Member Portal section)
- Certificate in Use
- Applied On
- Applied By

Multi-Factor Authentication

Account-Level Configuration

Multi-factor Authentication (MFA) can be configured at the Account level from **Settings** > **Security** > **Multi-Factor Authentication** for an additional layer of security. Multi-factor authentication is intended only for use with typical login credentials (Username and Password) and not with Single Sign-On**.** For users logging in via Single Sign-On (SSO), there is no impact on their login experience.



After selecting the toggle, the Administrator will be prompted to use one of two authentication methods:

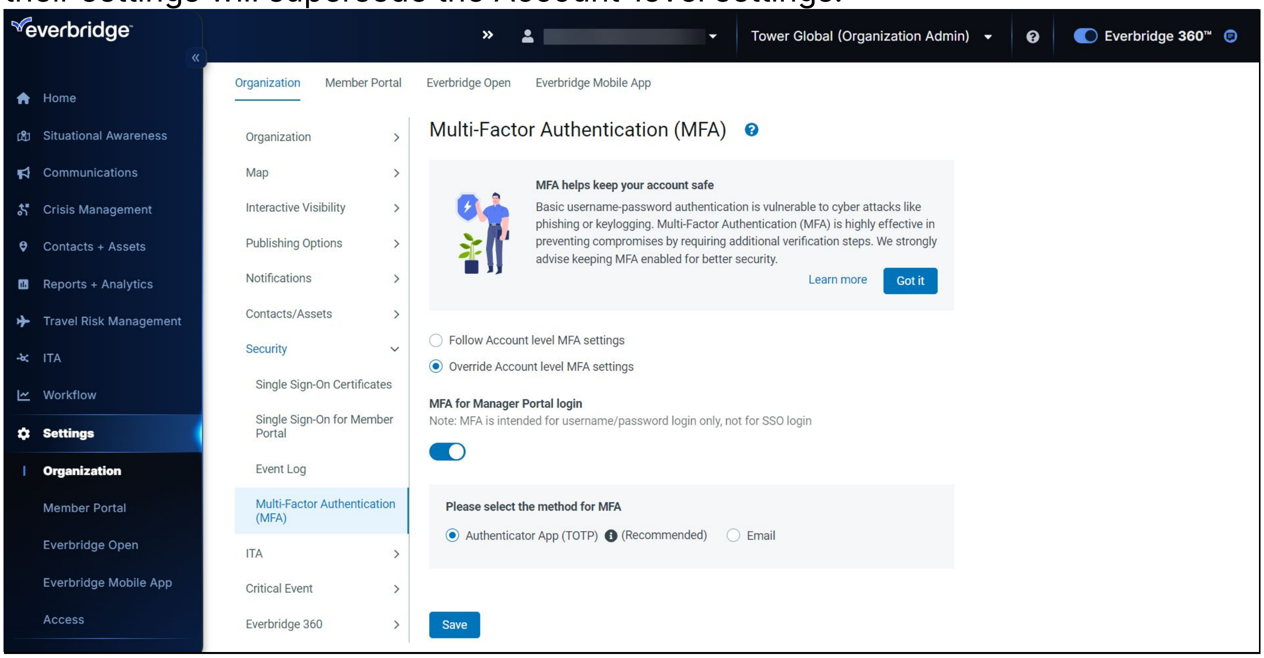
1. **Authenticator App (TOTP)**
2. **Email**

> **NOTE:** The **Authenticator App** option is recommended, as it provides users with a higher level of security.

Once the selection has been made and saved, all users from the Account will be required to use the specified Multi-Factor Authentication method when logging into Everbridge.

Organization Override

Administrators can also configure multi-factor authentication at the Organization level from **Settings** > **Organization** > **Security** > **Multi-Factor Authentication**. The Account Administrator must first define an Organization Override, which authorizes subordinate Organizations to configure their own Organization-level MFA settings based on the approved scope. If Organizations choose to override, their settings will supersede the Account-level settings.



Enabling or Disabling Multi-factor Authentication

Enable **Allow Organization to override MFA on/off** to allow Organizations to enable/disable MFA at the Organization level and choose what method of MFA to use.

Multi-factor Authentication Method

Enable **Allow Organization to override the method for MFA** if you would like to enable Organizations to choose their own authentication method (Authenticator App or email).

> **NOTE:** This option allows Organizations to override the Account authentication method but does not allow them to disable MFA.

Note that the Authentication App (TOTP) used by Everbridge has been tested against the following mainstream authenticator apps:

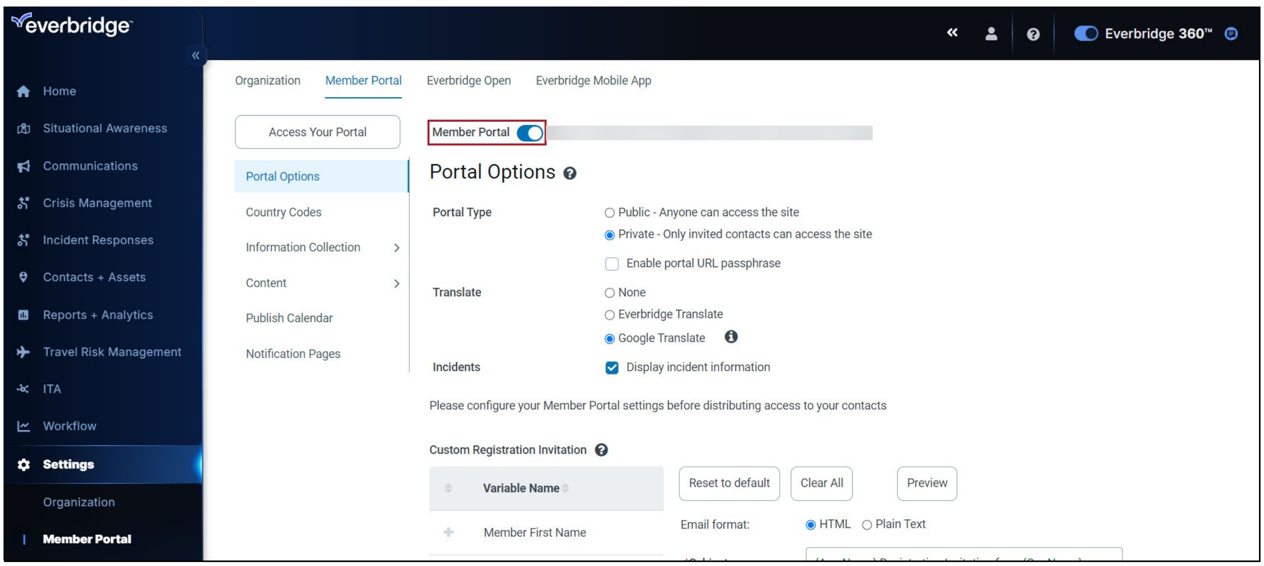
- Google Authenticator
- Microsoft Authenticator
- Duo Mobile
- Authy
- OneLogin Protect
- LastPass Authenticator
- Okta Verify
- FreeOTP
- Yubico Authenticator (requires use with a Yubikey)

If you want to use a different authenticator app, please seek advice from your IT department.

Member Portal Settings

From the **Settings** page in the Manager Portal, select the **Member Portal** tab. Configure your Member Portal settings before distributing access to your contacts.

Toggle the **Member Portal** switch ON to enable the Member Portal. If already configured, the Organization's Member Portal can also be **deactivated** with this toggle, preventing Member Portal contacts from logging in. To do this, deselect the **Member Portal toggle** at the top of the page. To reactivate, just select the toggle again.



Portal Options

Select the Portal Type:

- **Public** - Anyone can access the site.
- **Private** - Only invited contacts can access the site. You can edit and/or use the Custom Registration Invitation (email) provided for Member registration.

If needed, select the Translation radio button corresponding to the type of translation you want to use:

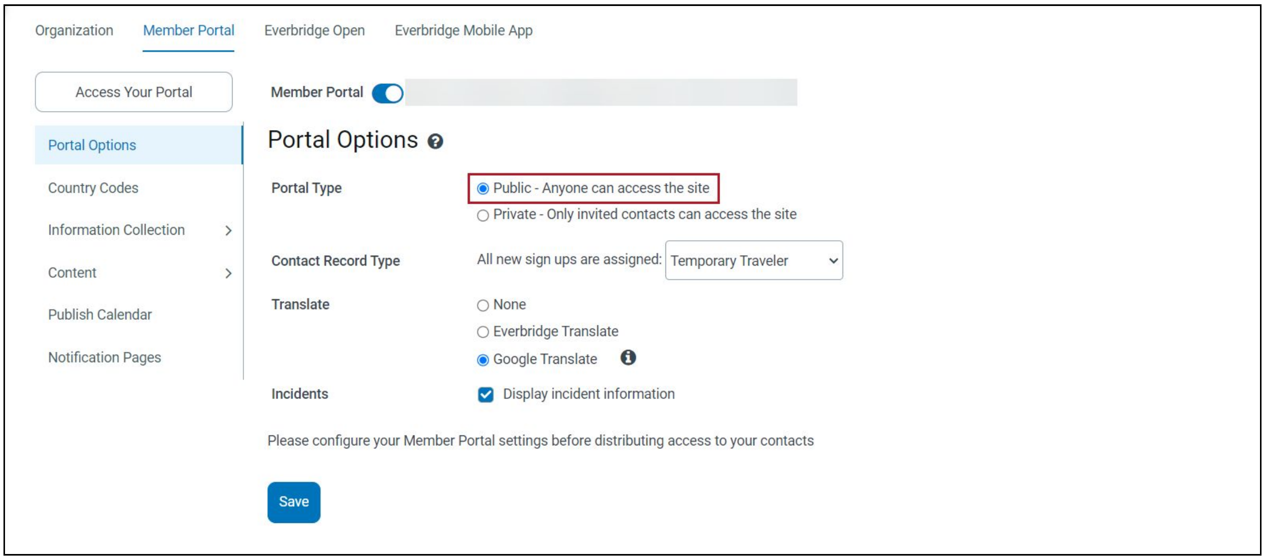
- None
- Everbridge Translate
- Google Translate.

When you launch the Member Portal, you can select the language you want to view from the drop-down list.

You can edit and/or use the **Custom Registration Invitation** (email) provided for Member registration.

Public Portal

If Public, from the Contact Record Type drop-down list, also select the record type that all new sign-ups are assigned. In the Public Member Portal, members can add new records. Members can also delete their accounts from here.



Private Portal

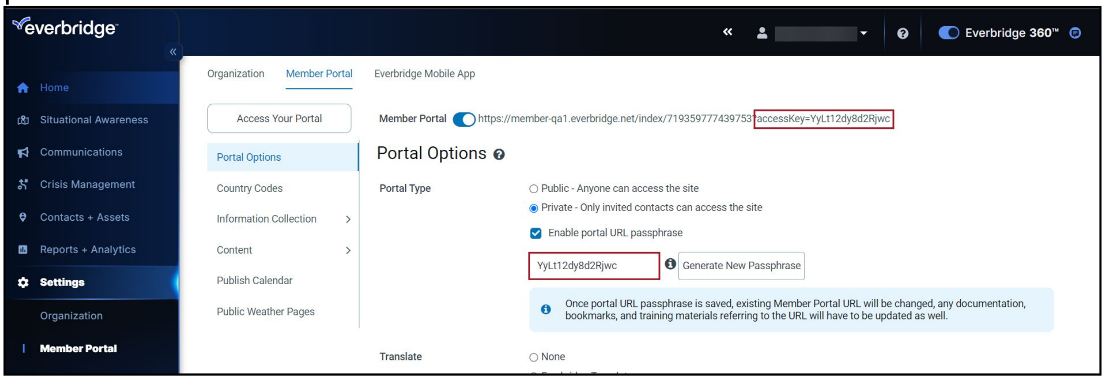
In the Private Member Portal, Organizations can offer employees an avenue to augment their Organization's uploaded data (first name, last name, company email, and work phone number) with personal data (cell phone, personal email, and home address information) to ensure successful message receipt.

Enable Portal URL Passphrase

Selecting the **Enable Portal URL Passphrase** checkbox allows you to add a passphrase to the Member Portal URL. Once enabled, the passphrase must be included in the URL to access your Member Portal going forward.

1. Check the box.
2. Either:
    - Create your own passphrase containing 10-15 alpha number characters.
        - The following special characters are supported in the Portal URL Passphrase: **!**, **-**, **_**,*****,**(**,**)**

- Click **Generate New Passphrase** to automatically generate a secure password.

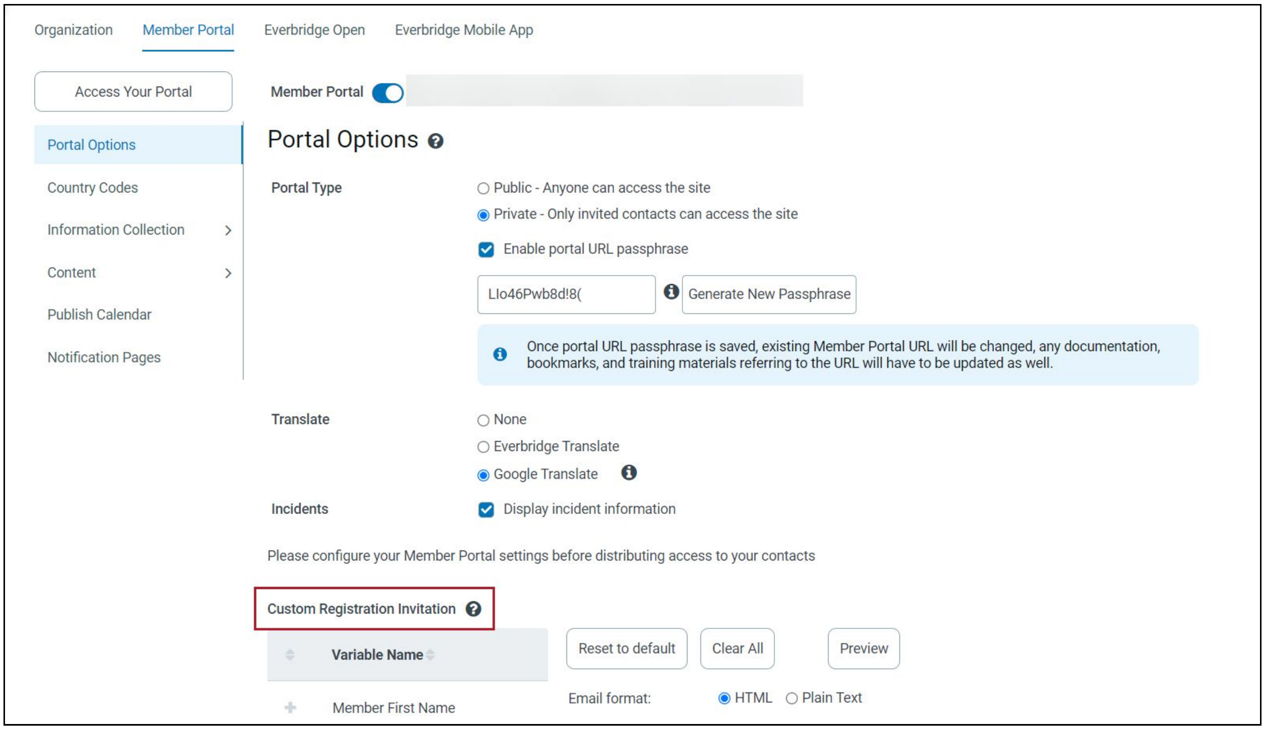


3. Click **Save**.

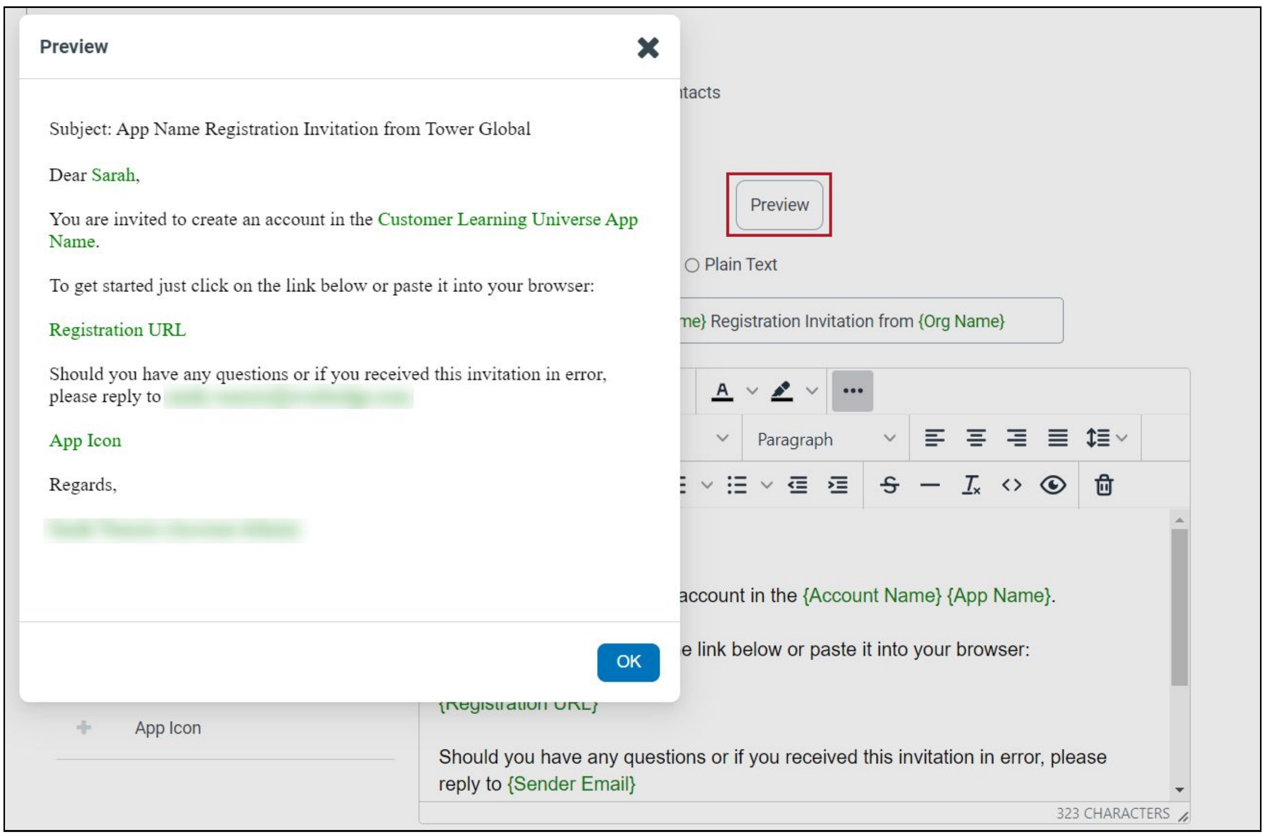
> **IMPORTANT:** Once a URL passphrase has been saved, the existing Member Portal URL will be changed. Any applicable customer documentation or communications should be updated to reflect the new URL.

Custom Registration Invitation

You can create a custom registration invitation when using a Private Member Portal. A default email is provided, which uses some of the available variables. Your invitation email format can be HTML or Plain Text. If HTML, you can select formatting options from the toolbar at the top of the Body text box.

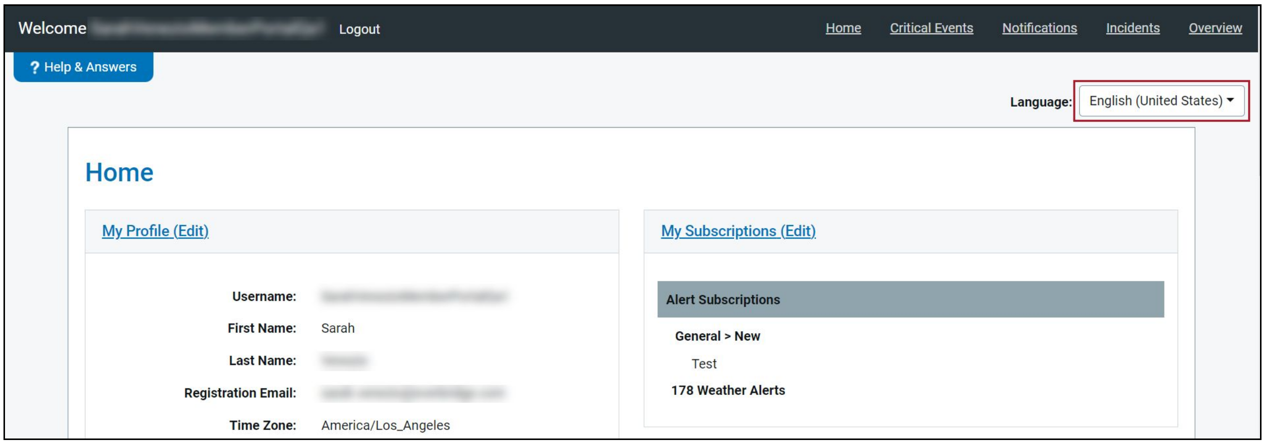


The following shows a Preview of the email invitation.



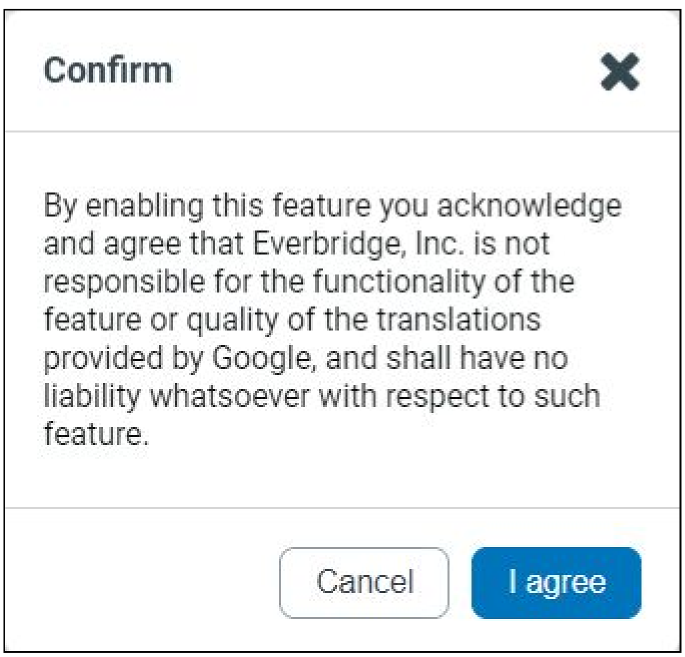
Everbridge Translate

If your Organization has enabled Everbridge Translate, you can select the checkbox. Then, in Member Portal, will see the Language field in the upper right-hand corner of the Member Portal screens. The default is English (United States).

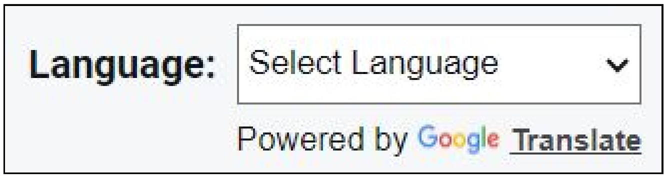


Google Translate

If your Organization has enabled Google Translate, you can select the checkbox: Enable Google Translate on this Portal Options page. The following Confirm dialog is displayed.

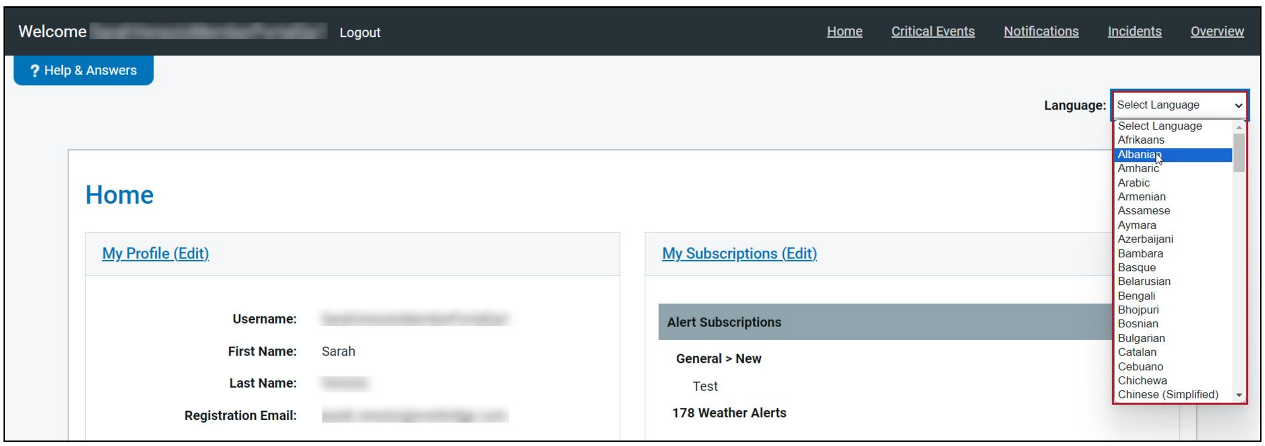


Click the **I Agree** button to confirm that you acknowledge and agree that Everbridge, Inc. is not responsible for the functionality of the feature or quality of the translations provided by Google, and shall have no liability whatsoever with respect to such feature. After confirmation, you will see the Google translation bar on every Member Portal screen.



Using Google Translate

If your Organization enabled Google Translate in Settings, you will see the **Select Language** field in the upper right-hand corner of the Member Portal screens. Optionally, select your desired language from the drop-down list. There are over 90 languages from which to choose.



Your Member Portal screens are converted to the selected language.

Content

Banner

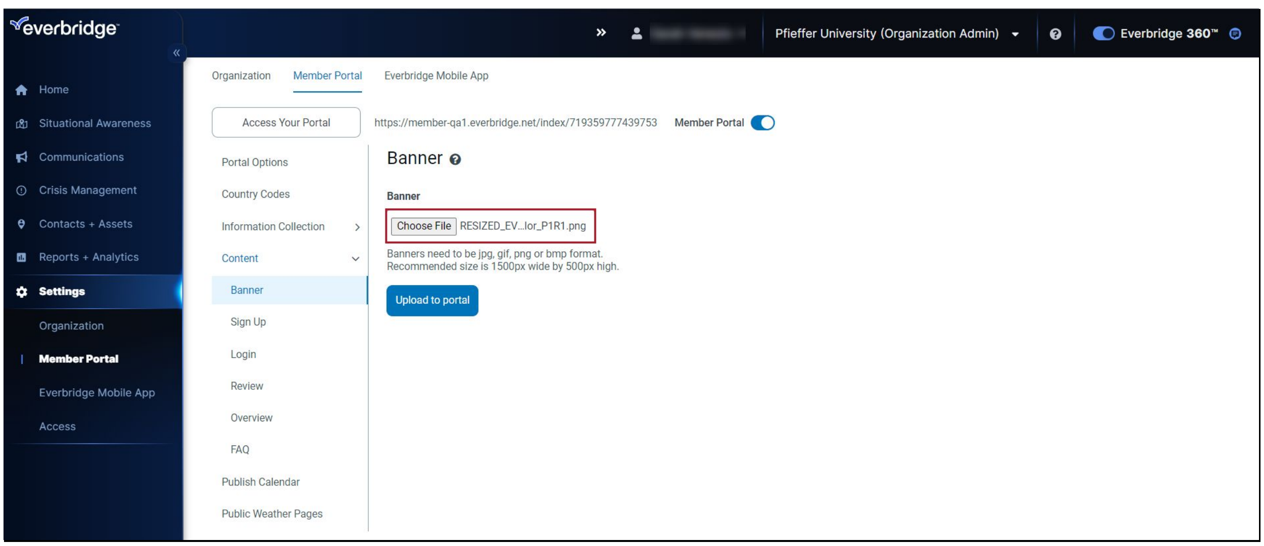
You can upload a banner to your Member Portal. The supported file types are:

- JPG
- GIF
- PMG
- BMP

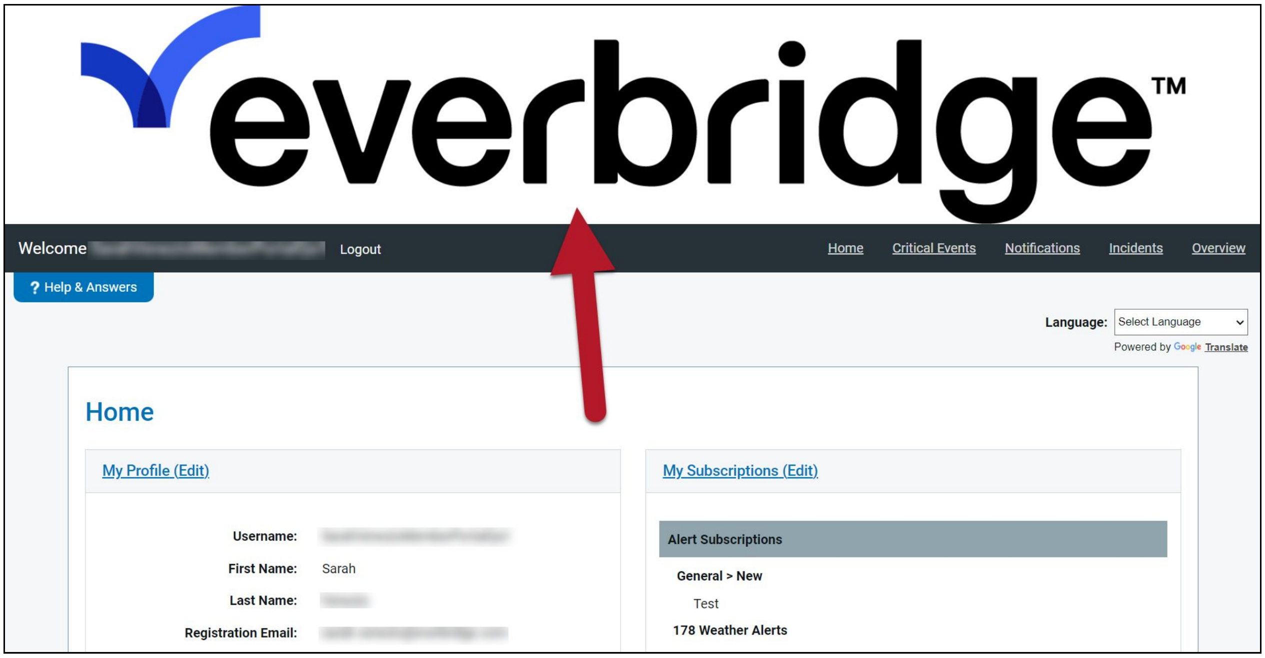
The suggested size is 1500 pixels by 500 pixels.

> **NOTE:** Be careful. If you have an existing banner and upload a different banner to the portal, and then change your mind, you must upload the original banner. In other words, you cannot cancel your upload.

Browse to your desired banner, then click **Upload to portal.**

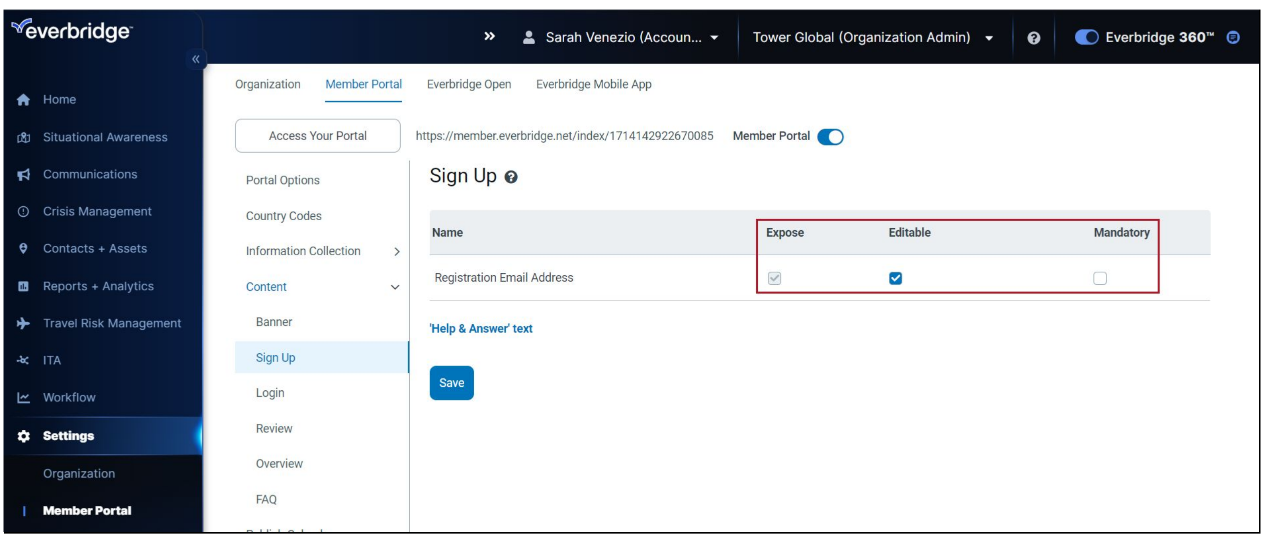


The banner will now appear at the top of all pages of the Member Portal.

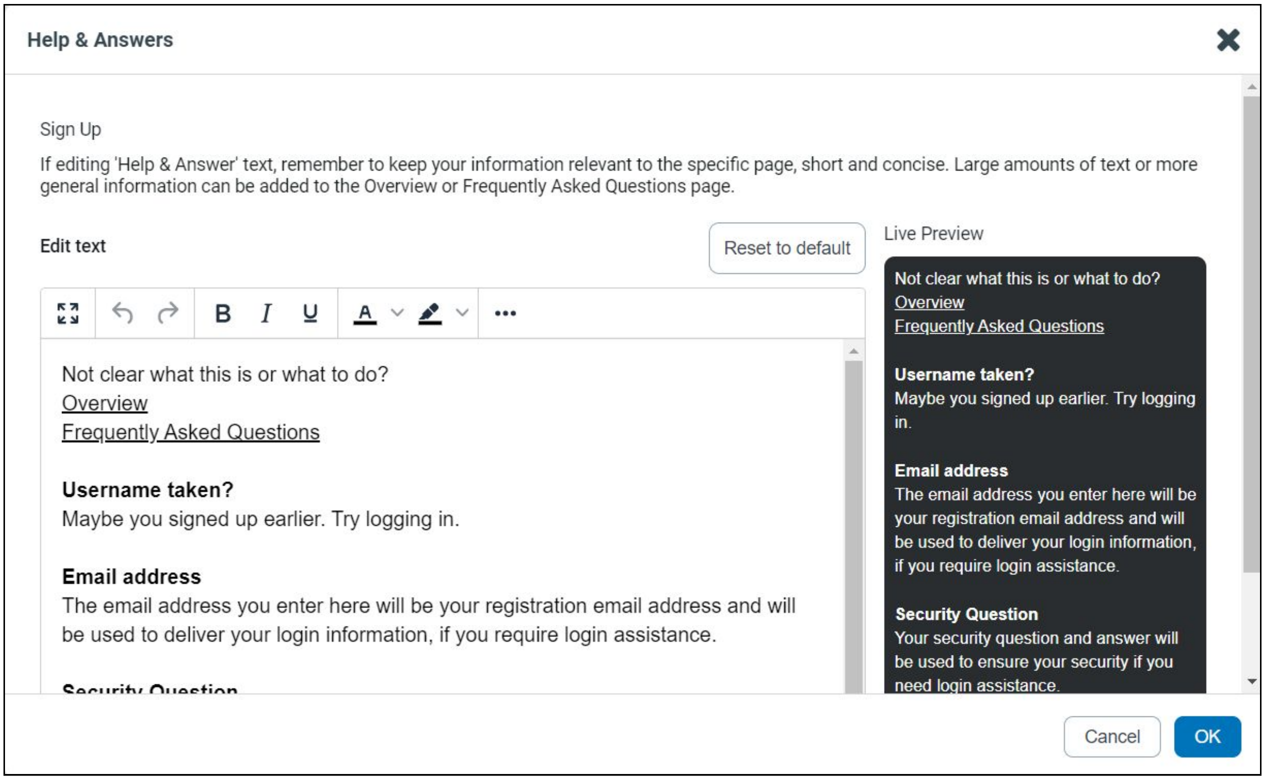


Sign Up

The Registration Email Address is always exposed and can be made editable. Select the **Mandatory** checkbox if you want the Registration Email Address to be required on the Member Portal.

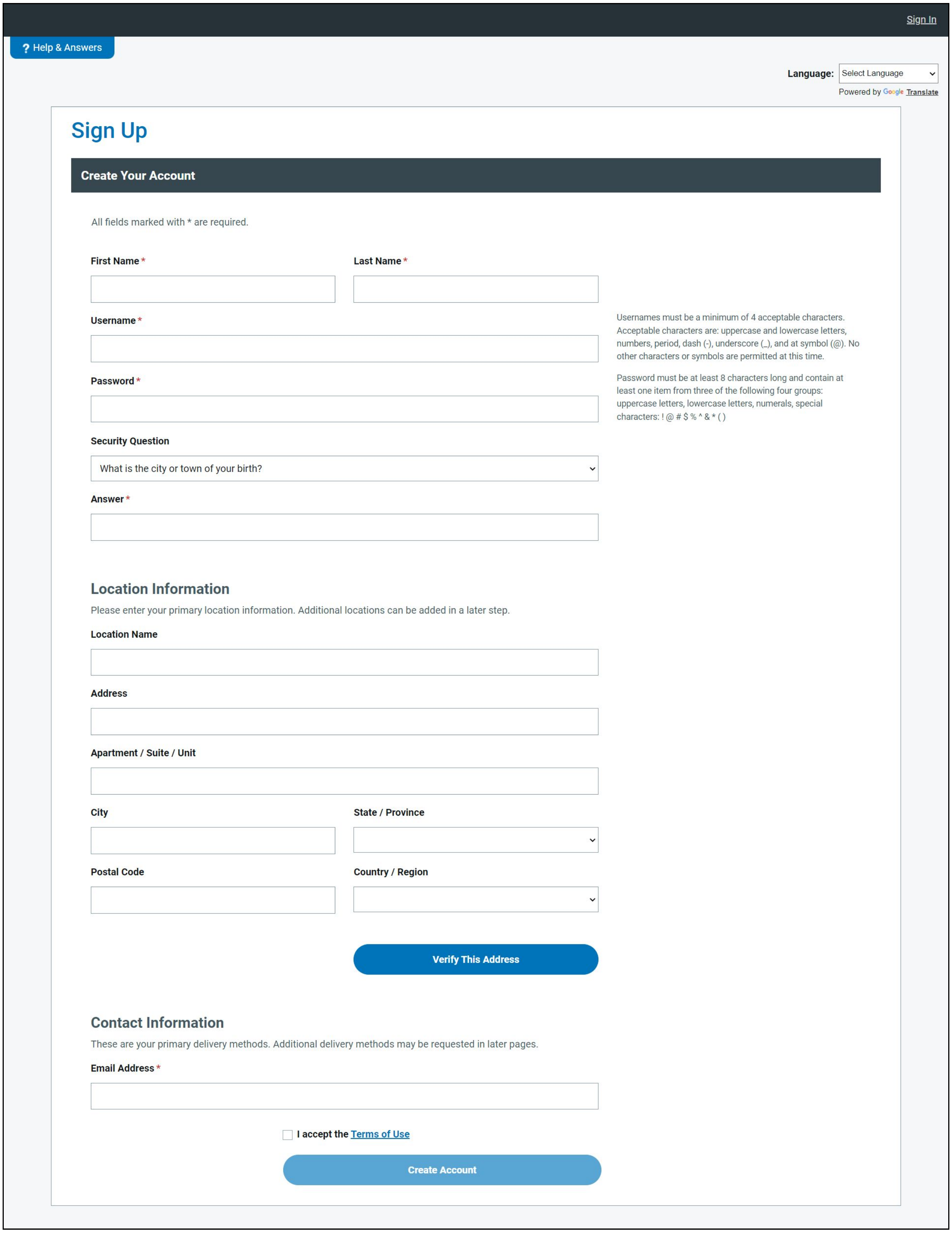


In addition, you can enter custom **Help & Answer** text to guide recipients through the sign-up process.

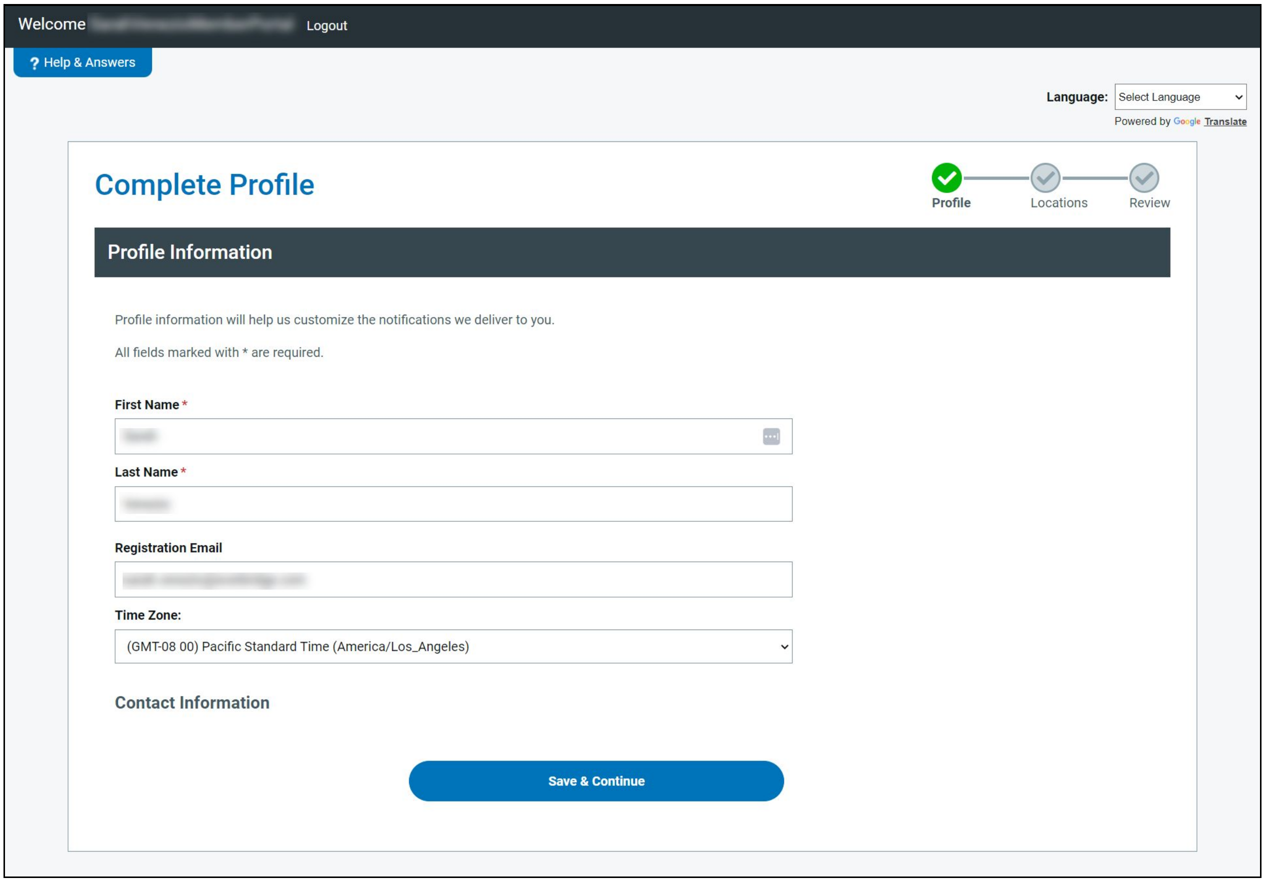


New Member Registration

If this is the first time the members have entered the Member Portal, they should click **Sign Up** to add their personal information. The Sign Up page is Web Content Accessibility Guideline (WCAG) compliant.

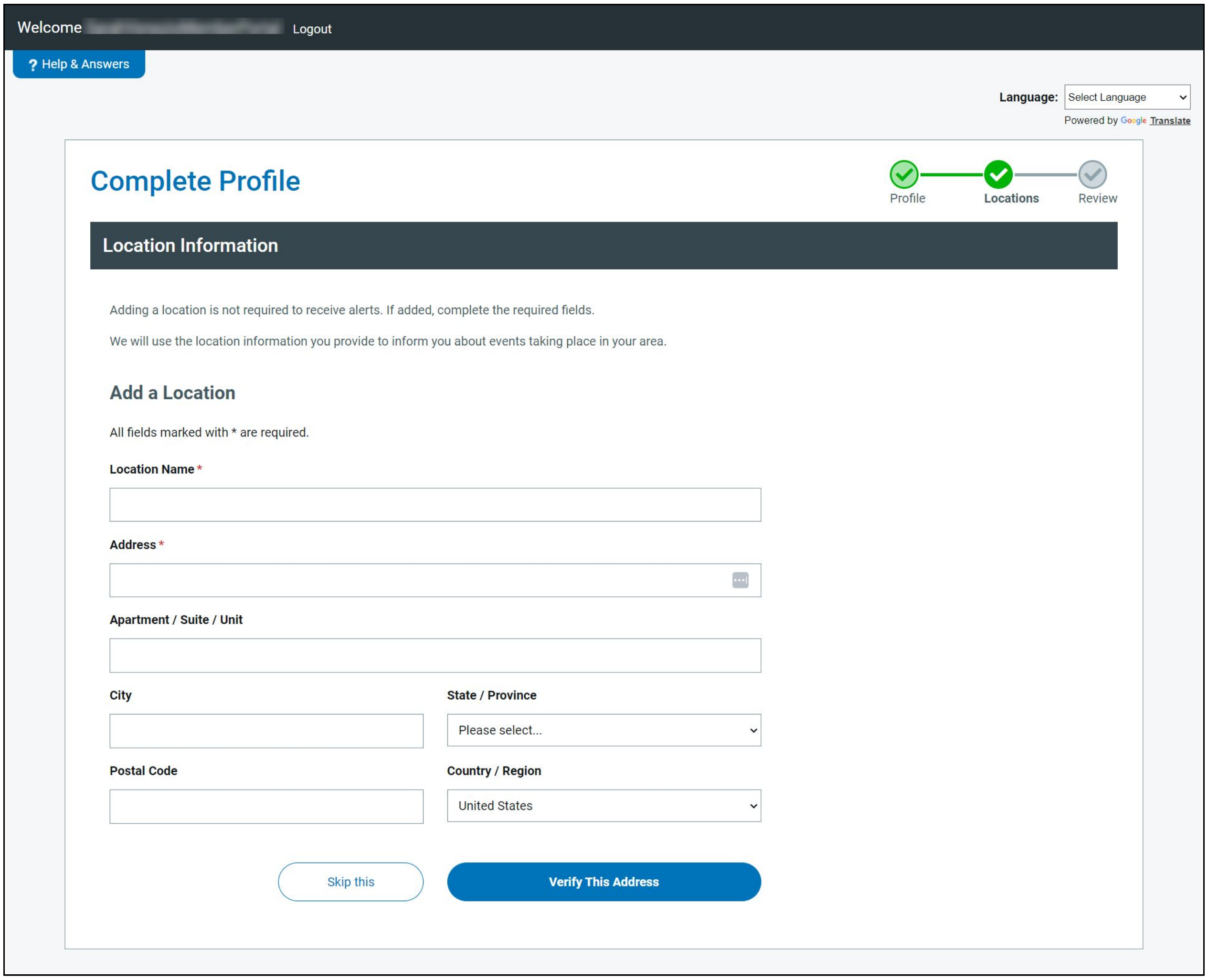

Sign In
? Help & Answers
Language: Select Language
Powered by Google Translate
Sign Up
Create Your Account
All fields marked with * are required.
First Name *
Last Name *
Username *
Usernames must be a minimum of 4 acceptable characters. Acceptable characters are: uppercase and lowercase letters, numbers, period, dash (-), underscore (_), and at symbol (@). No other characters or symbols are permitted at this time.
Password *
Password must be at least 8 characters long and contain at least one item from three of the following four groups: uppercase letters, lowercase letters, numerals, special characters: ! @ # $ % ^ & * ( )
Security Question
What is the city or town of your birth?
Answer *
Location Information
Please enter your primary location information. Additional locations can be added in a later step.
Location Name
Address
Apartment / Suite / Unit
City
State / Province
Postal Code
Country / Region
Verify This Address
Contact Information
These are your primary delivery methods. Additional delivery methods may be requested in later pages.
Email Address *
I accept the Terms of Use
Create Account

When the member completes the Sign Up page and clicks **Create Your Account**, the next set of pages appears, starting with **My Profile**. Progress indicators at the top of the page show the member the pages to accept "as is" or change, then click **Save & Continue**.

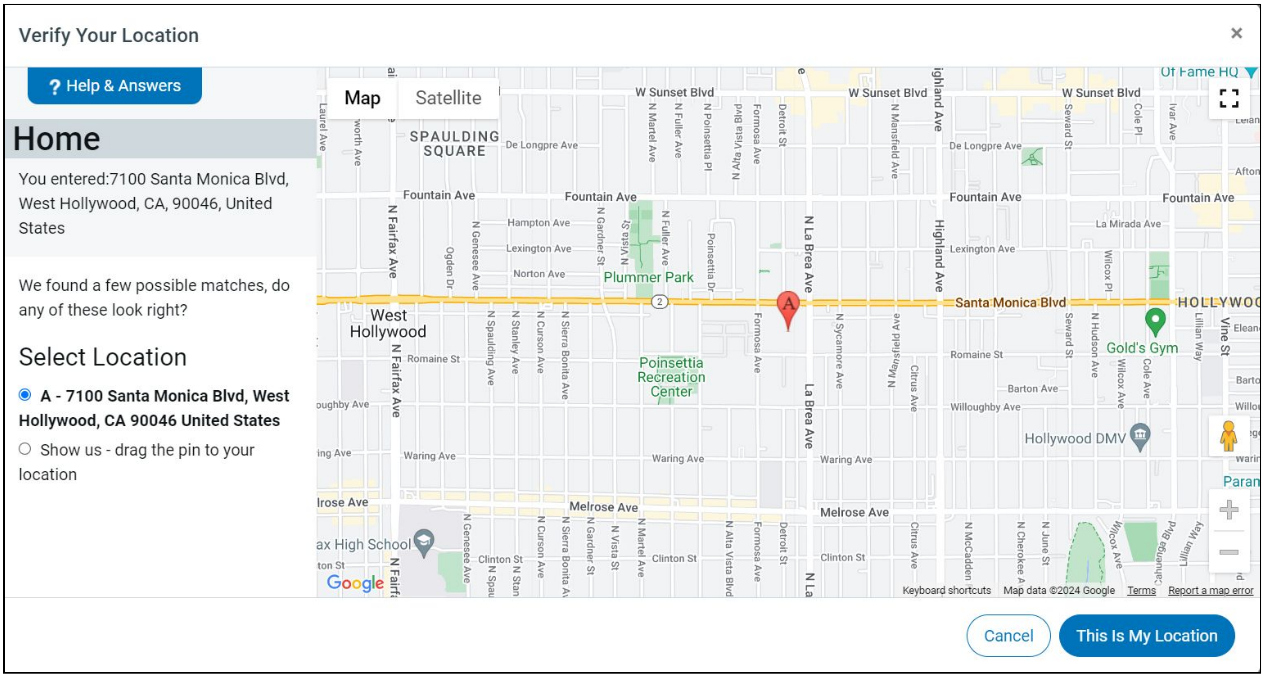


NOTE: There is no "Back" button. These pages can be updated later by logging in and then clicking Edit on the individual page to be modified.

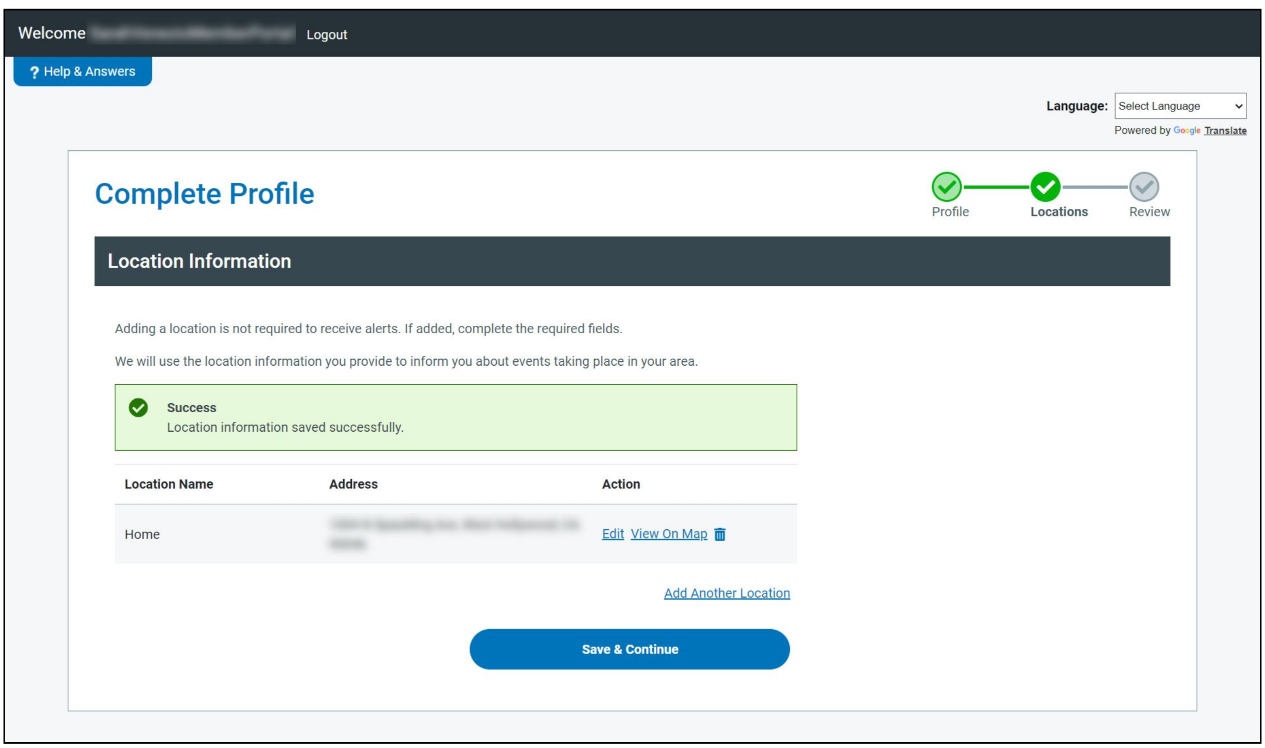
When the personal information on My Profile is valid, click **Save & Continue**. My Locations is displayed.



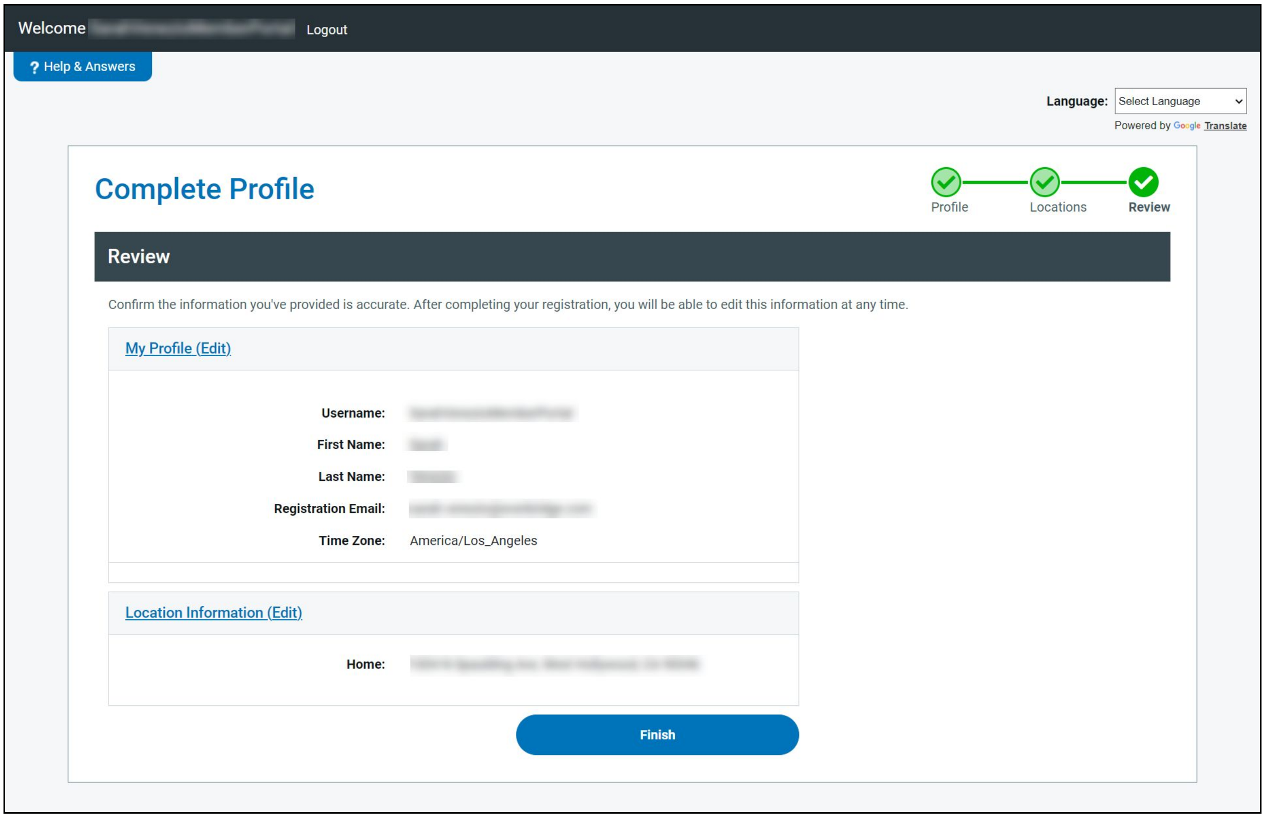
Fill in the fields and click **Verify This Address**. A map shows locations that are possible matches. Select the respective radio button and then **This is My Location**.



The location you just verified is listed on the **My Locations** page. To enter another location, select **Add Another Location**. When done, select **Save & Continue**.



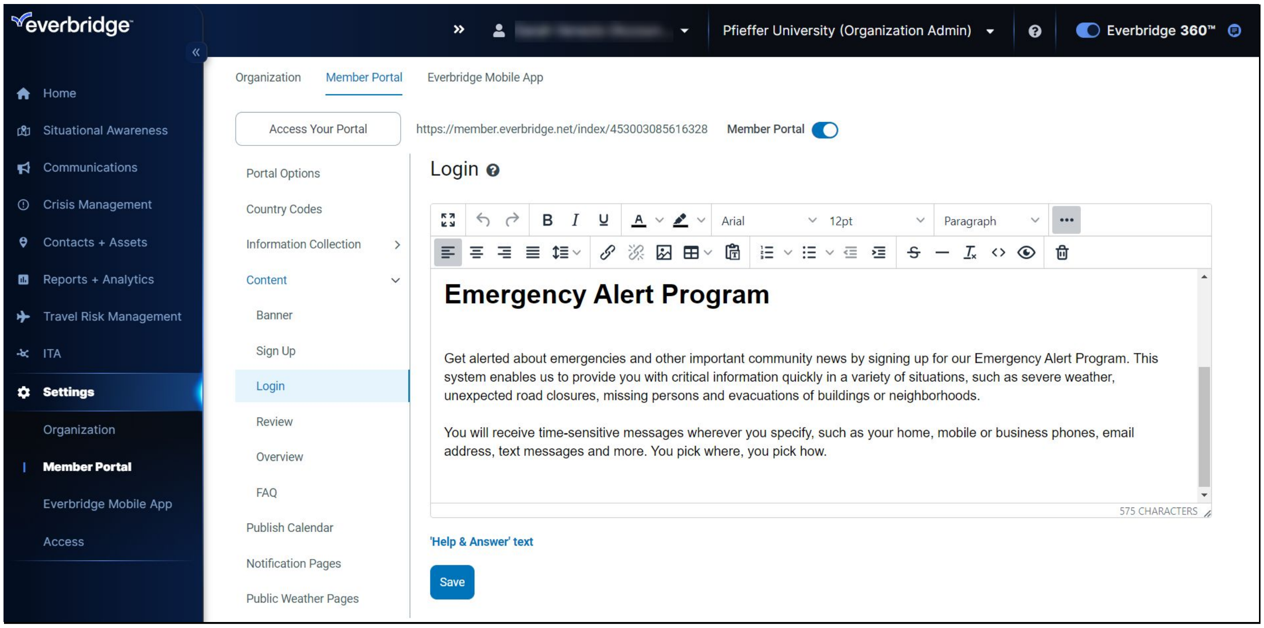
Click **Save & Continue**. The Review page appears. If needed, you can click **Edit** in any pane to change the information.



Click **Finish** when done.

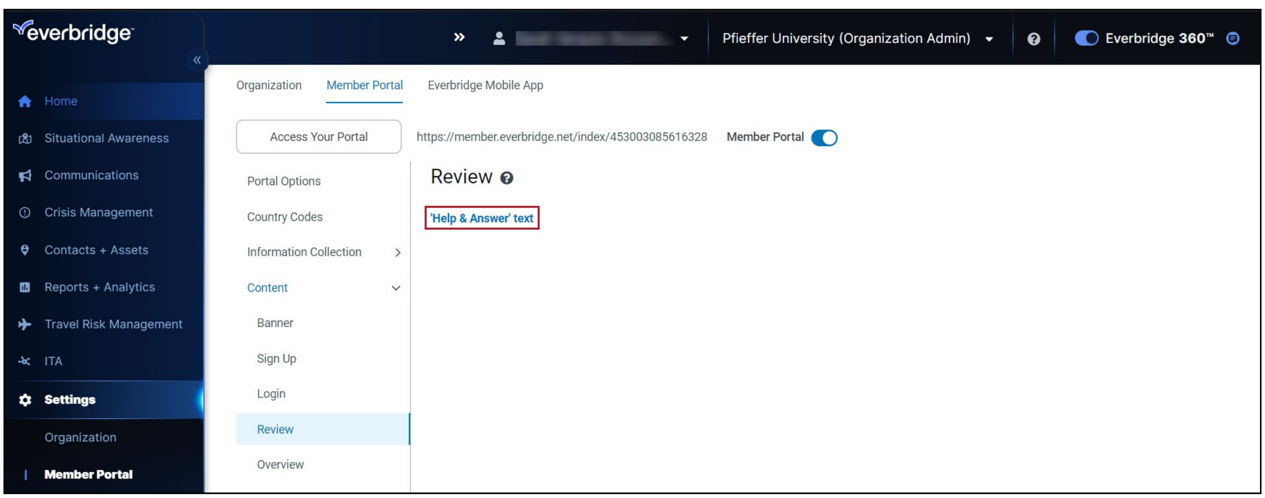
Login Page

Add text to be displayed on the **Login Page** of the **Member Portal**. When members first launch the URL to the Member Portal, they see this text on the **Login Page**. The Login page is Web Content Accessibility Guideline (WCAG) compliant. The following example shows sample text:

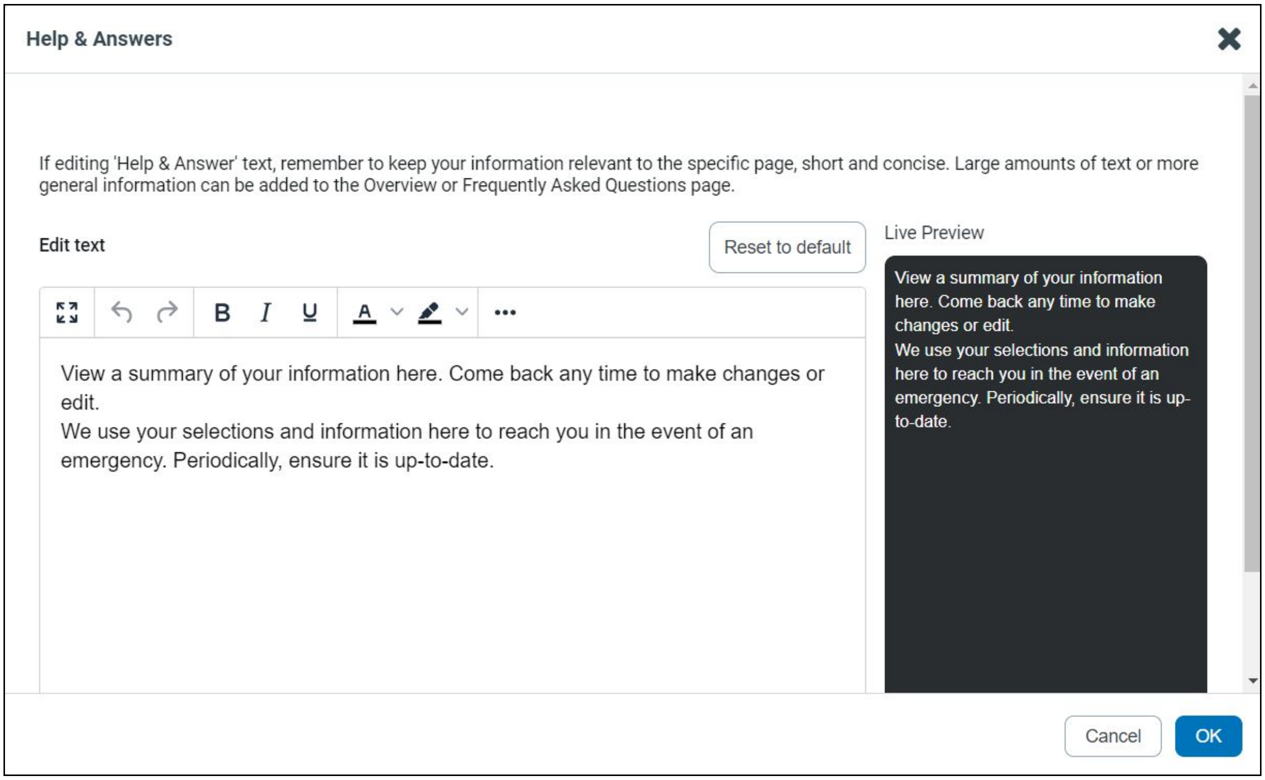


Review

Click **Help & Answer text** to open the text editor.



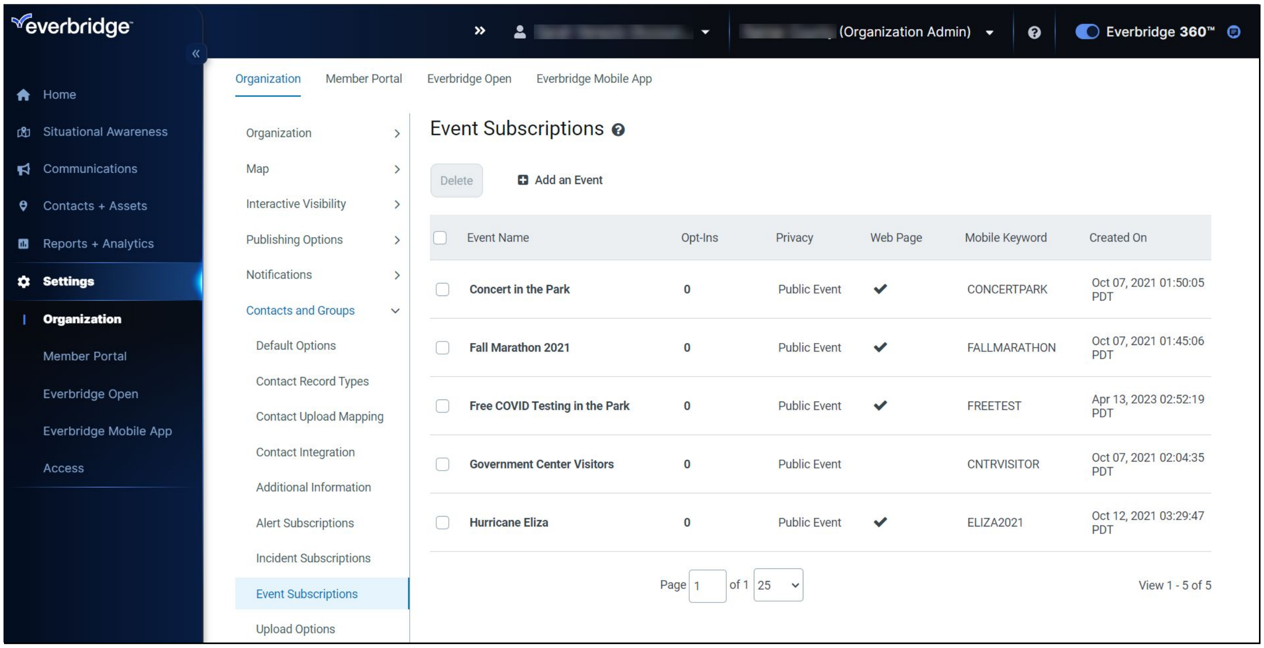
Add some informational text to guide users.



Events

You can add Public or Private event web pages to your Member Portal in **Settings** > **Organization** > **Contacts and Groups** > **Event Subscriptions.**

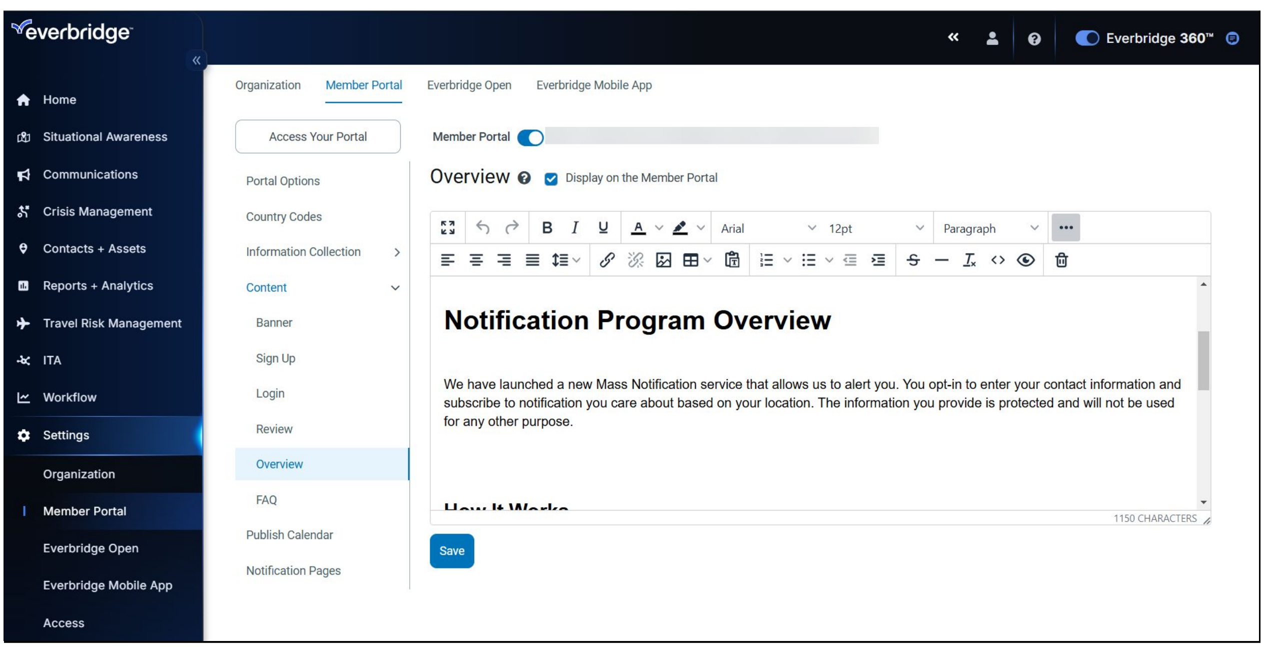
When the event subscription is saved, you see the list of event names.



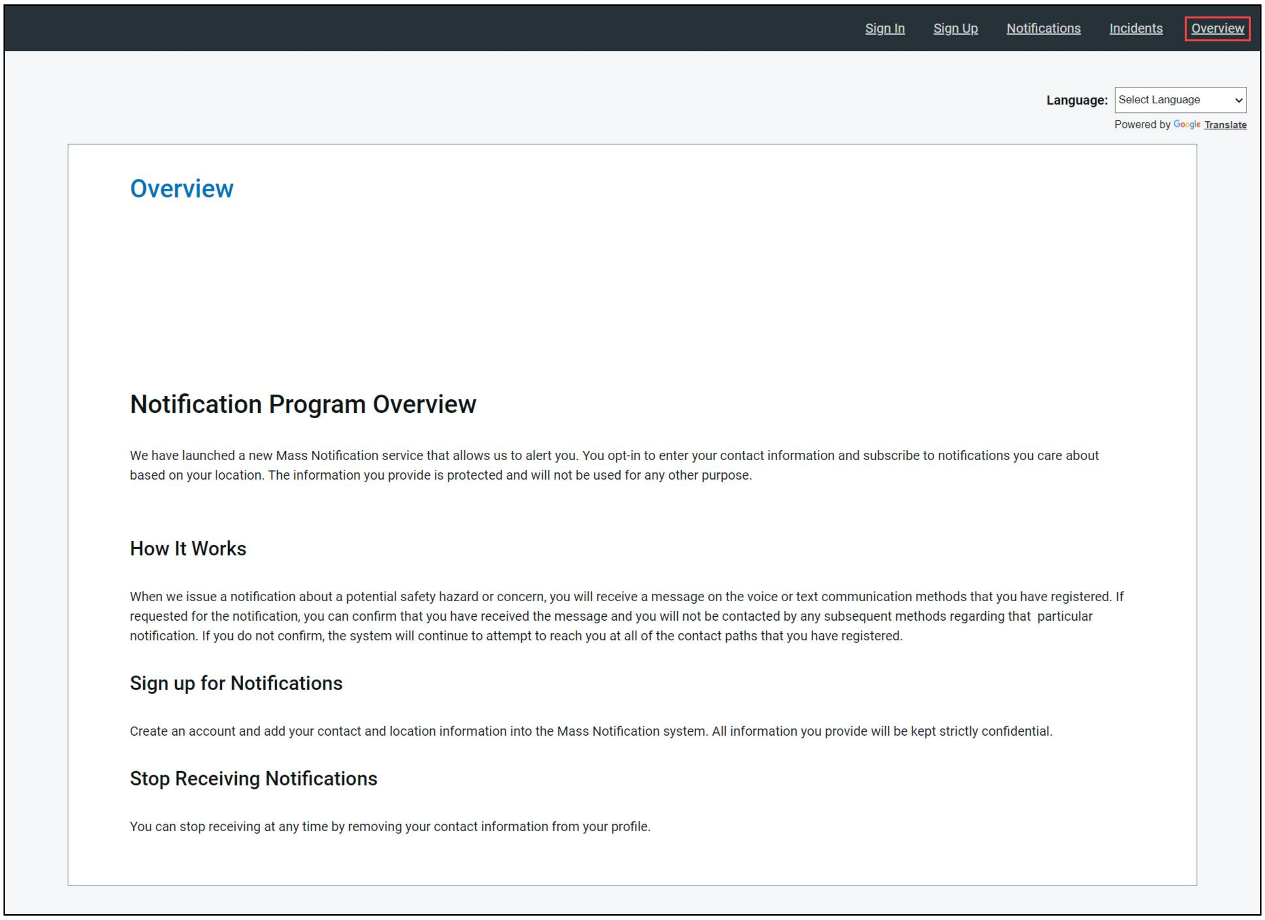
Any event that has **Event Web Page: Yes** selected will appear in the Member Portal when the user selects the **Events** link. Select the desired event from the drop-down list.

Overview

Select the **Display on the Member Portal** checkbox and enter text to be displayed on the **Overview** page in the Member Portal.



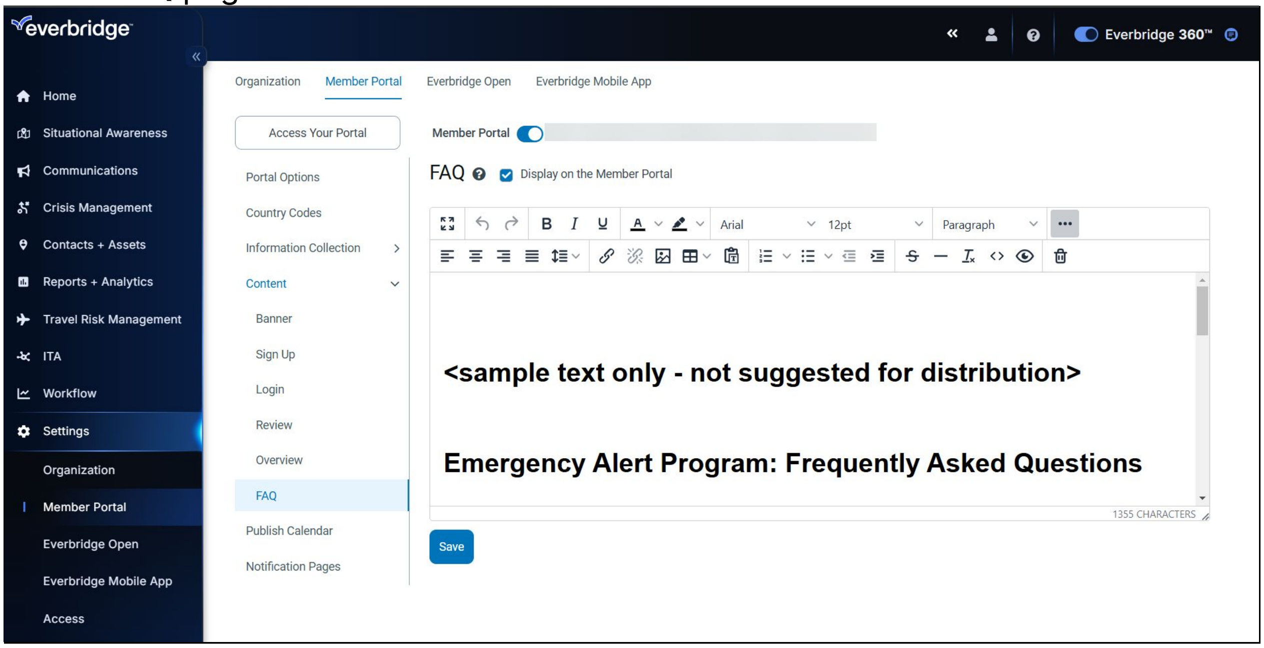
When the user accesses the Member Portal URL, the Overview link is displayed on the upper right-hand area of the login page. Click the **Overview** link to display the customized overview page of the Member Portal.



NOTE: Deselect the **Display on the Member Portal** checkbox and click **Save** to remove the Overview page from the Member Portal.

FAQ Page

Select the **Display on the Member Portal** checkbox and enter text to be displayed on the **FAQ** page in the Member Portal.



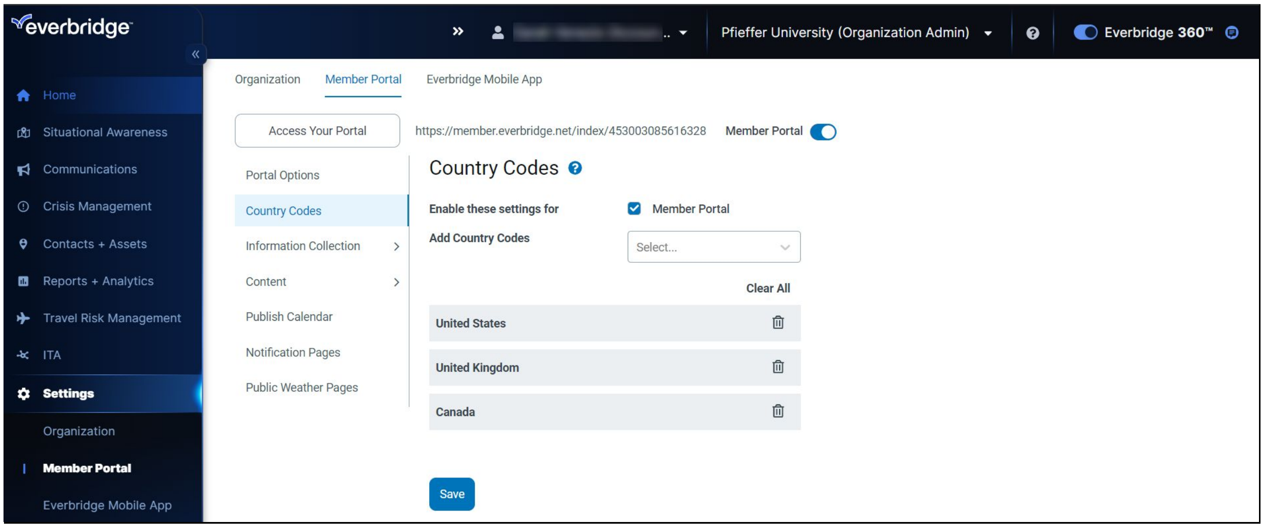
The **FAQs** link is displayed on the upper right-hand corner of all Member Portal pages. Click the **FAQ** link to display the Frequently Asked Questions and answers.

> **NOTE:** Deselect the **Display on the Member Portal** checkbox and click **Save** to remove the FAQ page from the Member Portal.

Country Codes

Select the country codes to list in the Member Portal when people register from **Settings** > **Organization** > **Member Portal** > **Country Codes**. To do this:

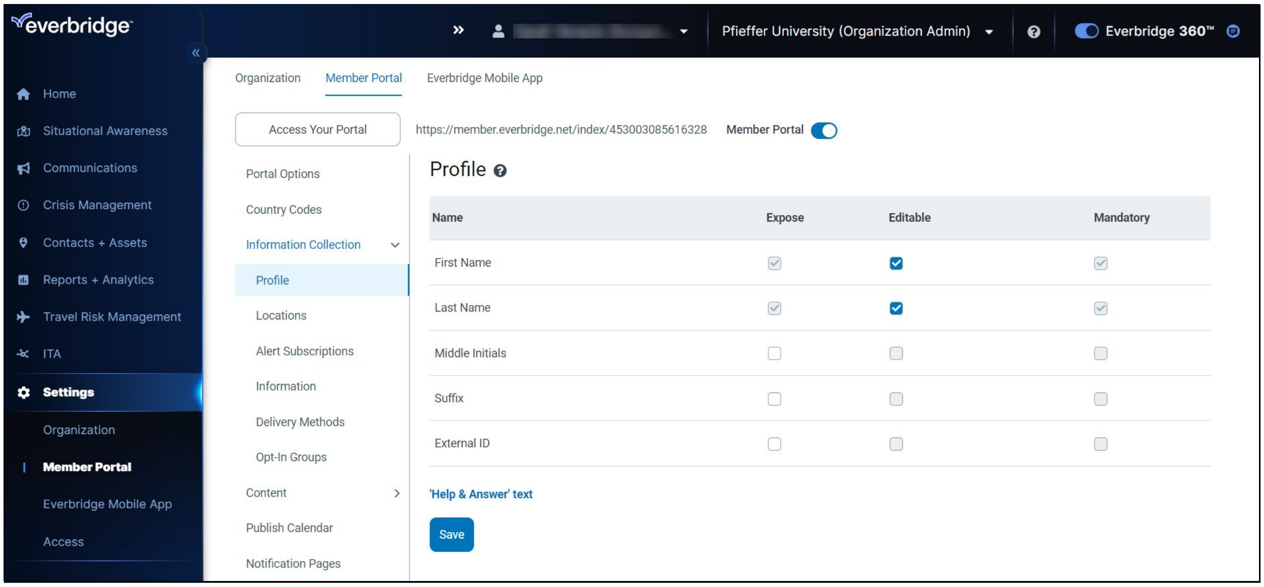
1. Select the **Member Portal** checkbox next to **Enable these settings for...**
2. Select the country codes from the **Add Country Codes** menu.
3. Click **Save**.



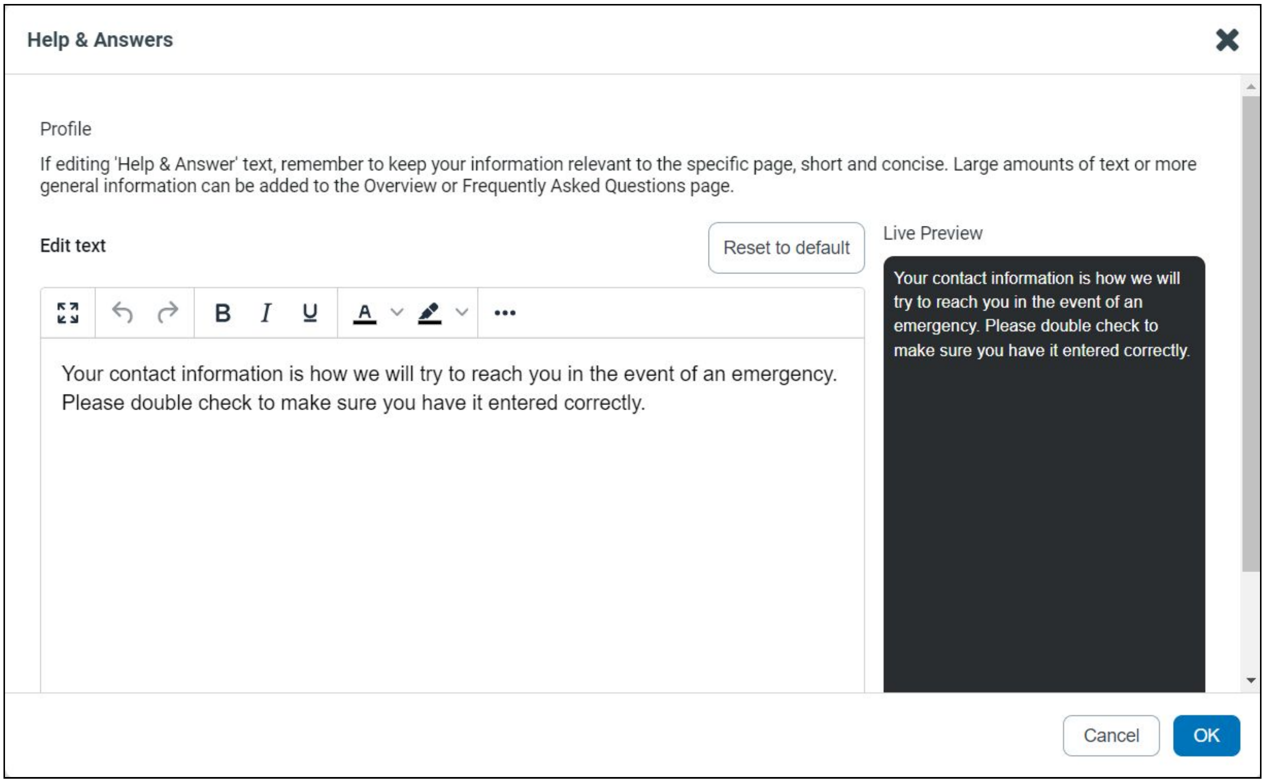
Information Collection

Profile

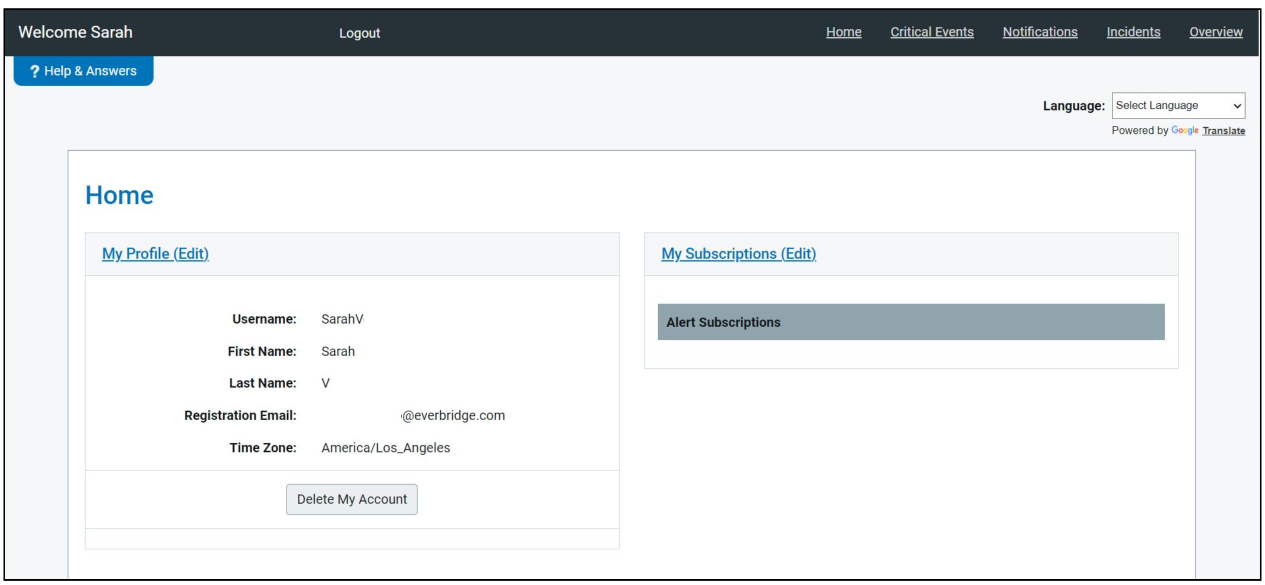
You can expose user profile settings. If you do, you can make the field editable and/or mandatory as well. Required fields are already selected. Select **Save**.



To aid your portal members, you can provide text regarding the specific page. Click the link: **Help and Answer** Text to display the ‘Help & Answer’ Text dialog. Edit the text per your Organization’s policies, then click **OK**.



When a member logs in to the Member Portal, his or her individual Profile page appears.

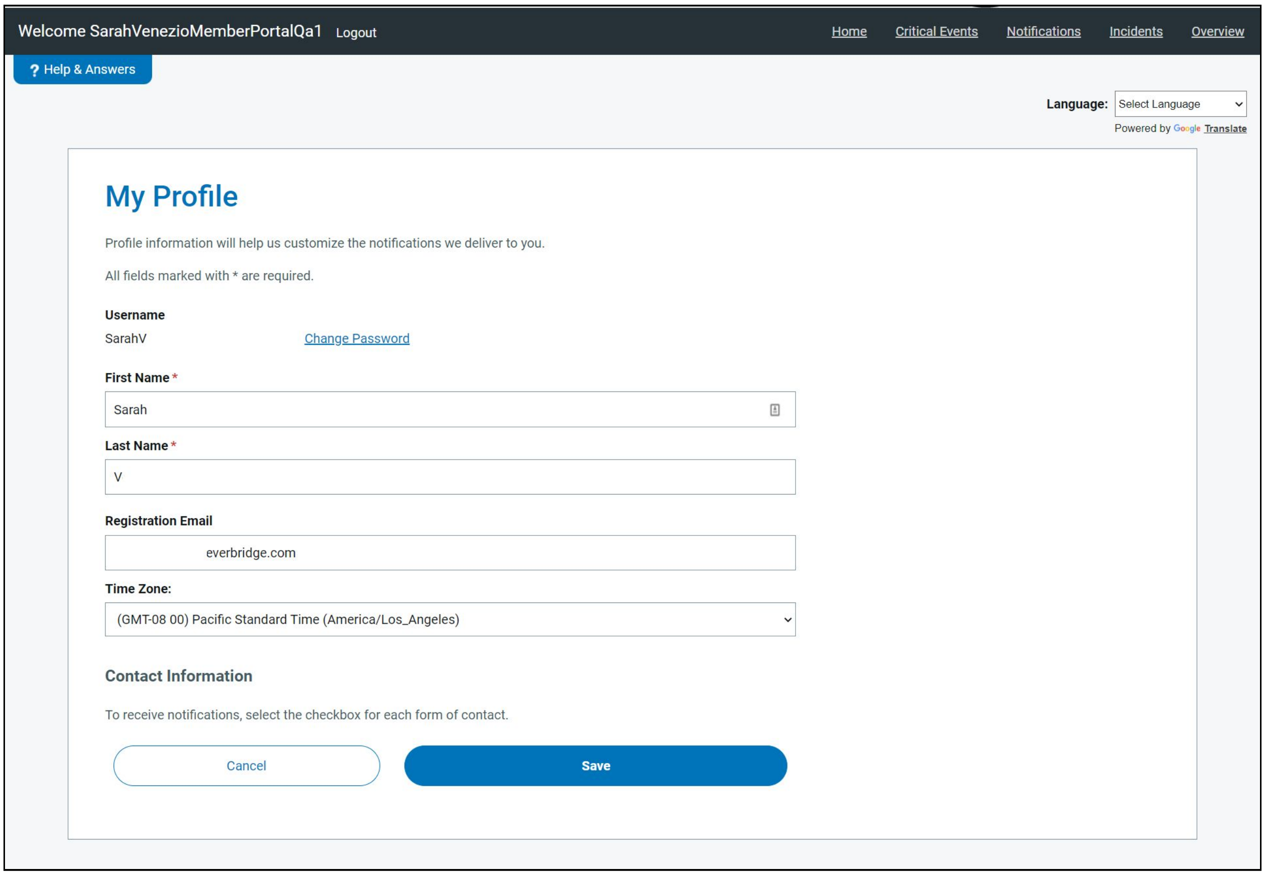


NOTE: A user can delete his or her own Member Portal account only from a Public Member Portal. The Delete My Account button is not available from a Private Member Portal.

Clicking the blue question mark (located in the upper left-hand section of the screen) displays the text you added from the link: **'Help & Answer'** Text link. Click the blue "X" to close the Help & Answer text.

In the section called **My Profile**, click **Edit** to change personal information and prioritize how to be contacted.

If members need to change their passwords, they must click the **Change Password** link next to the **Username** on the **My Profile** page.



The **Change Password** page appears. Fill in the fields per the on-screen instructions, then click Save.

Passwords are case-sensitive and may contain uppercase letters, lowercase letters, and numbers.

Federal Clients	Non-Federal Clients (Private Member Portal)	Non-Federal Clients (Public Member Portal)
Characters: 12-64	Characters: 8-64	Characters: 8-64
At least one item from each of the following four groups:	At least one item from three of the following four groups:	At least one letter and one number. Non-alphabetic characters are allowed.

<table>
<tr>
<td>Uppercase letters (A through Z)
Lowercase letters (a through z)
Numerals (0 through 9)
Non-alphabetic characters, such as ! @ # $ % ^ & * ( )
Cannot contain your account, first, or last name</td>
<td>Uppercase letters (A through Z)
Lowercase letters (a through z)
Numerals (0 through 9)
Non-alphabetic characters, such as ! @ # $ % ^ & * ( )
Cannot contain your account, first, or last name</td>
<td>Uppercase letters (A through Z)
Lowercase letters (a through z)
Numerals (0 through 9)
Non-alphabetic characters, such as ! @ # $ % ^ & * ( )
Cannot contain your account, first, or last name</td>
</tr>
<tr><td>Password lock after 3 attempts</td><td></td><td></td></tr>
<tr><td>Password expiration default: ON
Prompt users to create a new password every:
30 Days
60 Days
180 Days</td><td></td><td></td></tr>
<tr><td>When your password expires, you will need to provide a new password. (The new password cannot be the same as the previous 24 passwords.) If you change your password before it expires, the counter resets to zero (0) and starts a new cycle.</td><td></td><td></td></tr>
</table>

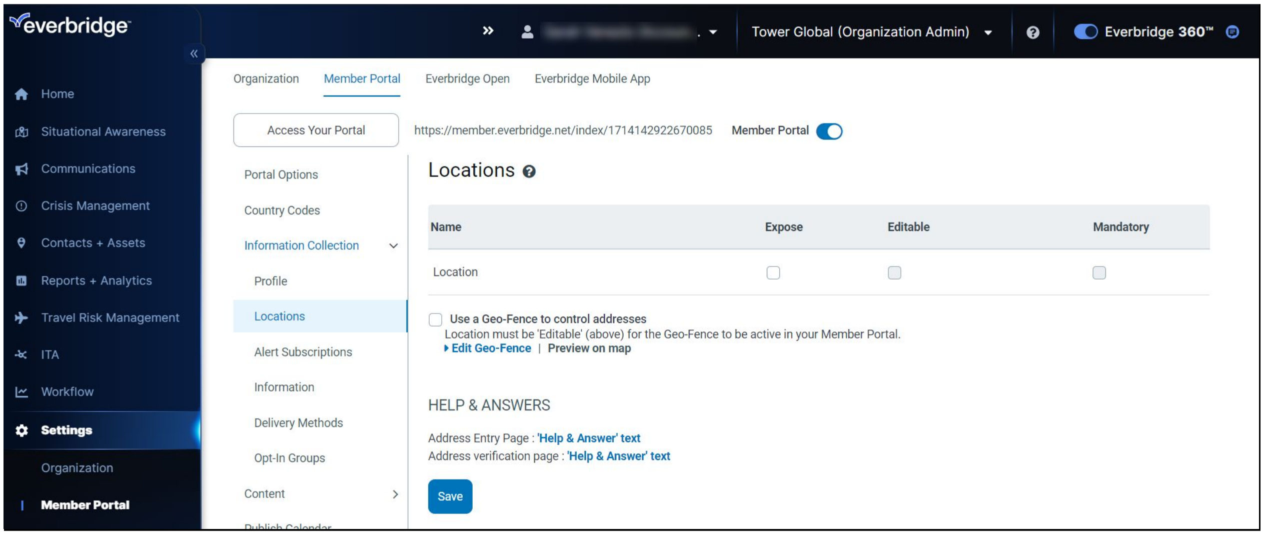
Locations

Displaying/Collecting Address Information

You can use the Locations page to either display pre-loaded addresses to your members or collect address information from your members.

If you enable this option, then you can also allow your members to edit any pre-loaded addresses or add addresses.

Use the **Mandatory** option to require your members to add at least one address in order to save their member profile.



Geofence

A geofence is a virtual perimeter for a real-world geographic area you can use to control the addresses your members may add to their profiles. In Everbridge Suite, you use shapes to define a geofence.

You can enable a geofence in three steps:

1. Select one or more shapes for your geofence.
2. Select the location handling rule for your Organization.
3. Enable the geofence.

To select one or more shapes:

1. Add the desired shapes to **Settings** > **Organization** > **Map** > **My Shapes**.
2. Return to **Settings** > **Member Portal** > **Information Collection** > **Locations**.
3. Select the link: **Edit geofence** to view the list of shapes available for this Organization.
4. Select the checkbox for the shape.
5. Save your changes.

You can add any number of shapes to your geofence at any time. Use the reverse steps to remove a shape from your geofence at any time.

Selecting the Location Handling Rule

By default, the application will not save an address in a member's profile if the Latitude and Longitude for the address are outside of the geofence shape(s). If you want the application to accept any address, then check the box: **Add**

addresses even if outside the geofence. You will be able to later review a Quick Report of any addresses outside your geofence.

Enabling Your Geofence

You must enable the geofence if you want Everbridge Suite to compare the addresses that your member enters to your geofence. Select the checkbox: **Use a geofence to control addresses** to instruct Everbridge Suite to use your geofence.

You can temporarily or permanently disable your geofence at any time. When you disable your geofence, the application will not compare any new addresses or changes to existing member addresses to your geofence.

> **NOTE:** Your existing member addresses will not be affected if you remove or change your geofence. Any changes you make to your geofence will only affect addresses entered or edited after you save the new geofence.

In the section called My Locations, click **Edit**. Members can add, edit, and delete their own locations. Members can also view existing locations on the map.

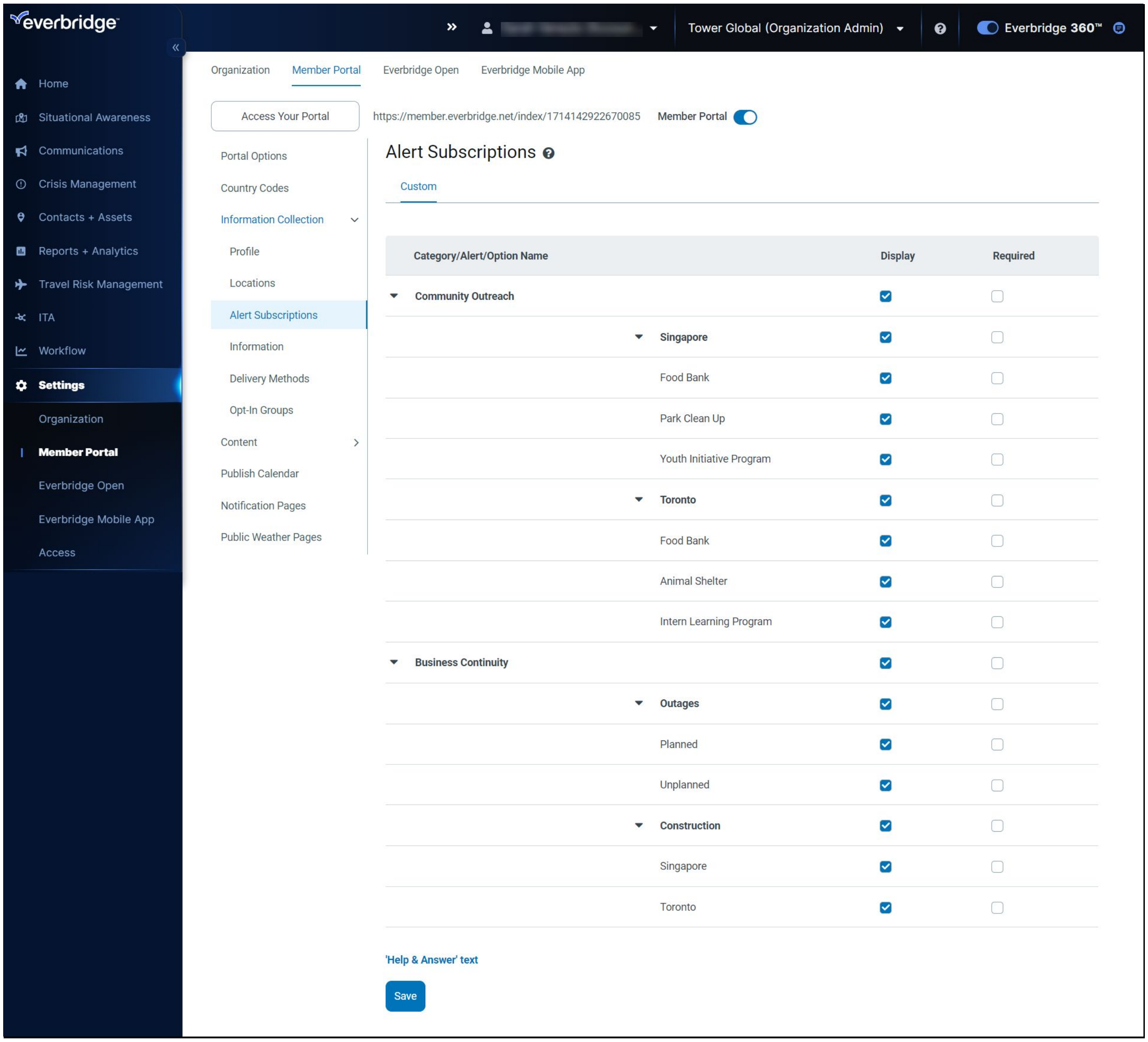
When you enter or edit a location, click **Verify This Address**. A map shows locations that are possible matches. Select the respective radio button and then **This is My Location**.

Alert Subscriptions

Alert subscriptions are available for all Organizations by default.

Select either:

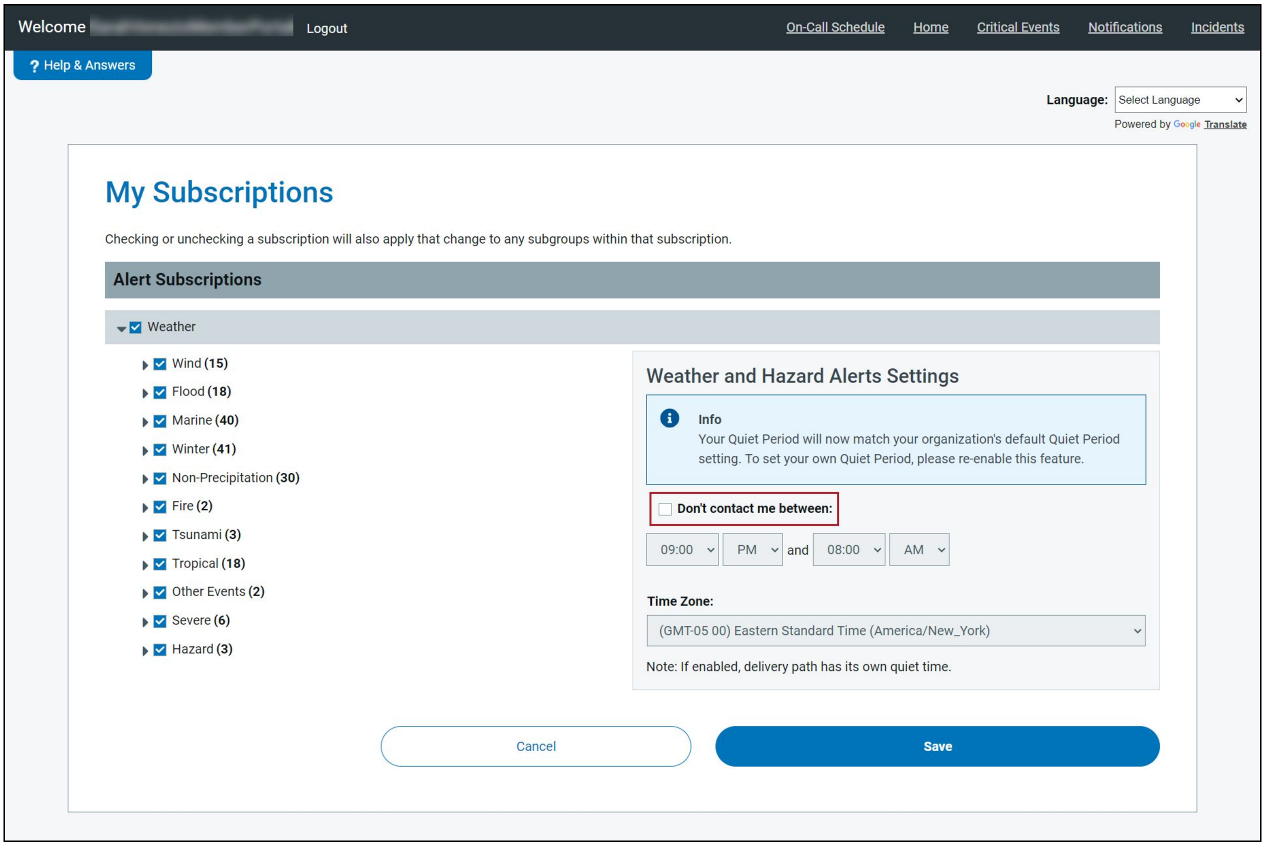
- **Custom—**The Custom events are not displayed by default. That is, they are not exposed to your members until you select the respective Display checkboxes. Any Organization can add as many custom subscriptions as desired. The Account Administrator and/or the Organization Administrator determine the custom subscriptions.
- **Europe—**The relevant European Weather events are displayed. (For details, see the Automated Weather Alerts chapter of the SMART Weather Alerting User Guide.)
- **United States—**The United States Weather events are not displayed by default. That is, they are not exposed to your members until you select the respective Display checkboxes. You can choose to remove the ones your Organization does not want to offer in your Member Portal by clearing the corresponding Display checkboxes.



Automated Weather Alerts

See the **Automated Weather Alerts** chapter of the SMART Weather Alerting User Guide for details.

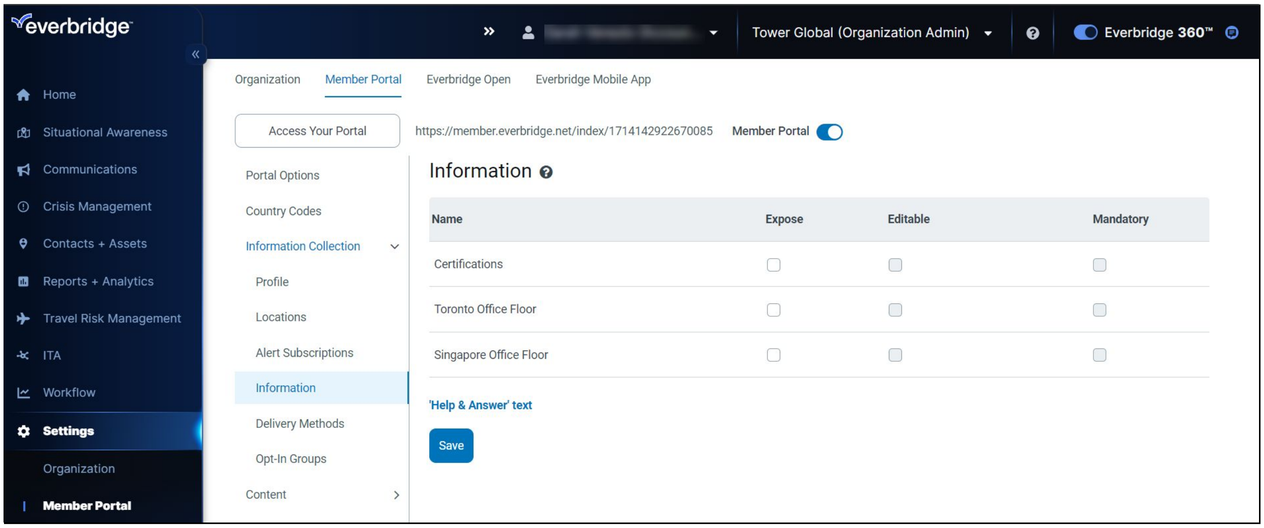
When the member launches the Member Portal, click **Edit** in the section called My Subscriptions. Click the arrow to expand the alert list. Members can clear the checkboxes for the alerts they do not want to be made available.



Depending on the Organization's quiet settings, see the relevant section above, where members can specify a “No Contact” time period. In the **Weather and Hazard Alerts Settings** pane, select the checkbox: **Don’t contact me between**. Then, from the drop-down lists, select the time range and time zone. Select **Save**.

Information

Additional Information fields are populated here with the values that the Organization has set up in **Contacts and Groups** > **Additional Information**. You can expose this information, or make the fields editable and/or mandatory by selecting the respective check boxes. Select **Save**.



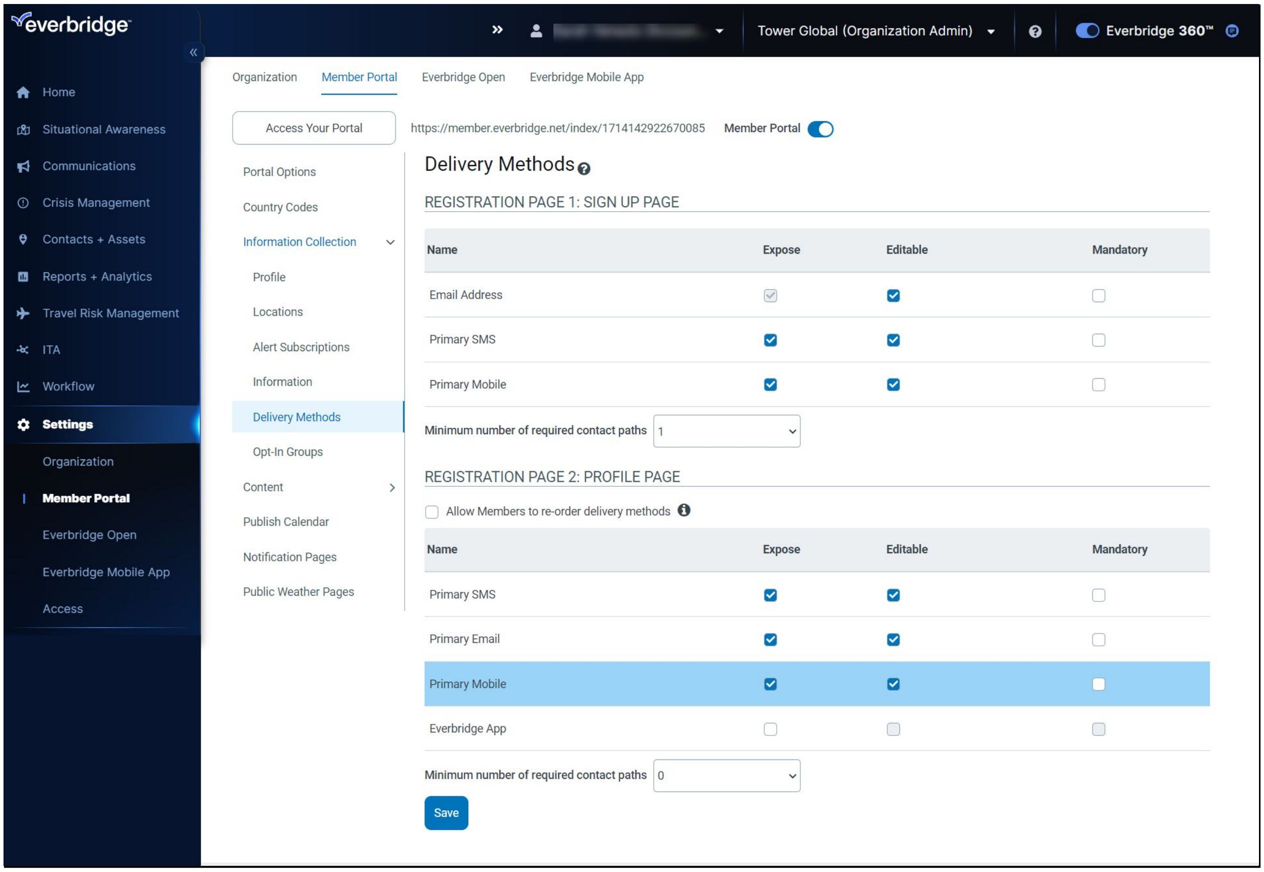
You can expose selected Information fields on the Member Portal. If you do, you can also make the field editable and/or mandatory.

In the section called My Information, click **Edit**.

Delivery Methods

You can expose Delivery Methods. If you do, you can make the fields editable and/or mandatory as well. By selecting the checkbox: **Allow Members to re-order delivery methods**, in the Member Profile, members can re-prioritize their delivery methods.

In addition, you can select the minimum number of required delivery methods from the drop-down list or type the number if it does not yet exist. Select **Save**.



Member Portal Alternative Registration

If enabled, you will see this page instead of the default Delivery Methods page (above). Your Delivery Methods page provides separate Member Portal page registrations:

- Registration Page 1: Sign Up Page
- Registration Page 2: Profile Page

You can expose Delivery Methods and make the fields editable and/or mandatory. The Registration 2: Profile Page is identical to the default Delivery Methods page (discussed previously).

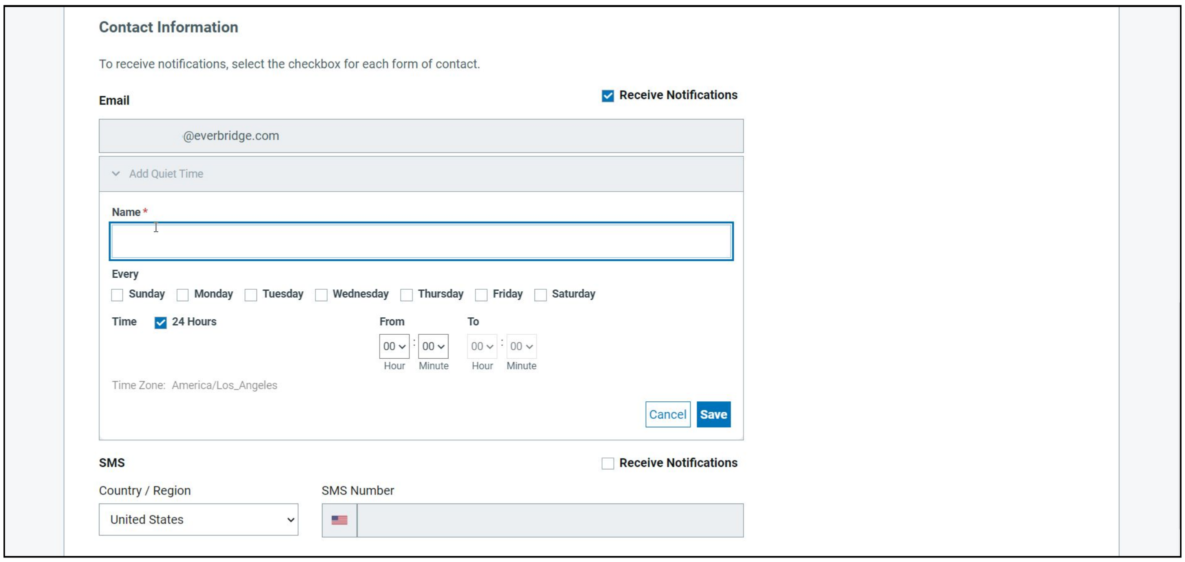
After selecting **Edit** next to My Profile, the **Contact Information** section displays fields for the members to fill in their delivery method numbers. They can reorder the delivery method priority if you selected the check box: Allow Members to re-order delivery methods. Members can select the Up and Down arrows to re-order their delivery methods. Members must click **Save** after entering their information.

Setting Quiet Times

If allowed in the Organization Settings, members can set their own Quiet Times per delivery method. From the My Profile pane, click Edit and individually, edit the Quiet Time of each delivery method.

To set a Quiet Time:

1. From the My Profile pane of the Member Portal, click **Edit.**
2. Review the **Contact Information** section.
3. Select the **+ Add Quiet Time** link under the delivery path for which to change its Quiet Time. The selected **Quiet Time - {delivery path} dialog** is displayed.



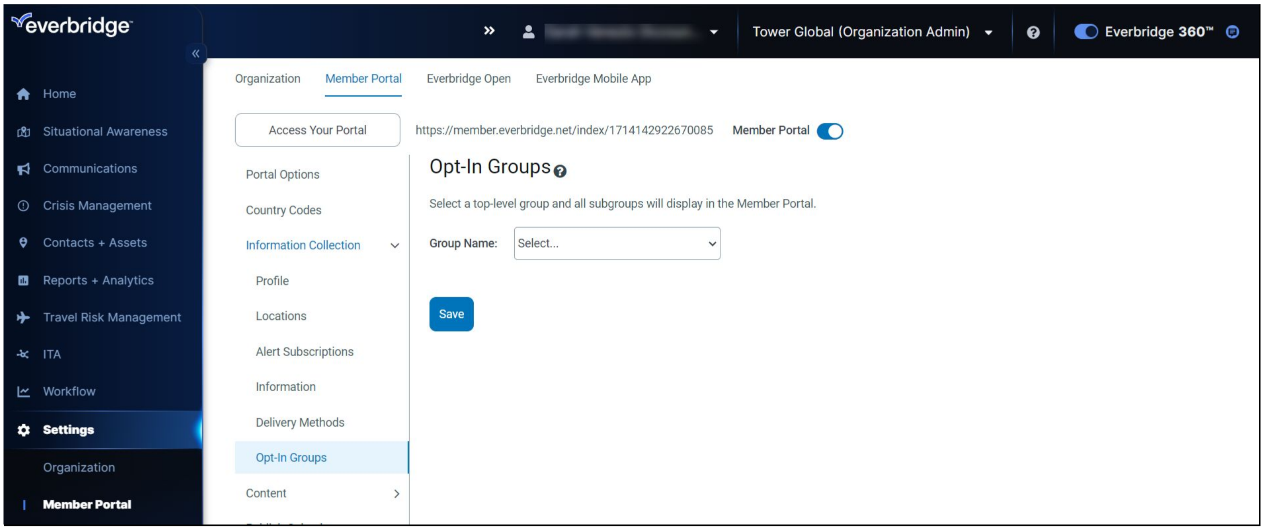
4. Fill in the following fields:
   - Name—Type a name of this specific Quiet Time.
   - Every—Select the day(s) of the week.
   - Time—Either select the checkbox: 24 Hours or enter a time range (From and To HH:MM in the specified time zone).
5. Click **OK**.
6. Repeat Steps 3 through 5 to set a Quiet Time for each delivery method, as needed.

Opt-In Groups

You can use static groups as opt-in containers for all your registrants. Residents can opt into one or many groups, and can adjust their group opt-in selections after registering.

In **Member Portal** > **Settings** > **Information Collection** > **Opt-In Groups**, select a top-level group and it and its sub-groups will display in the Member Portal. Click

Save. Then click **Yes** to confirm you want the update the group subscription options in the Member Portal.

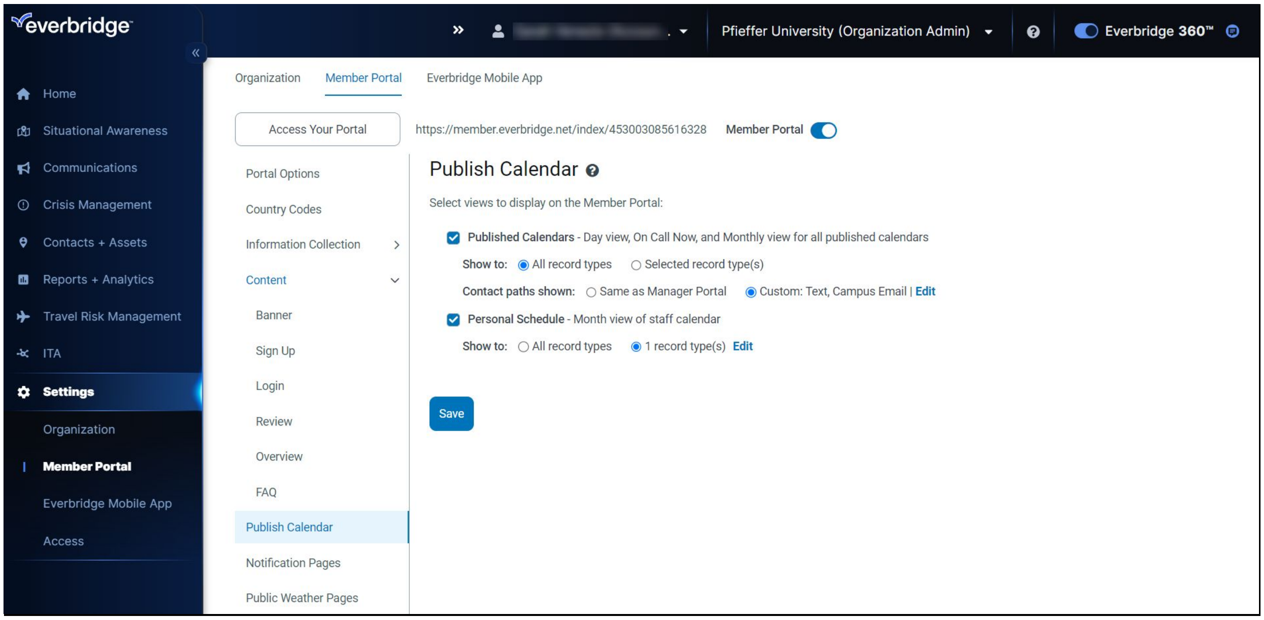


Generating a Test Notification

Registrants of Public or Private Member Portals can contact Customer Support and request that a test Notification be sent to them to confirm that their information is entered properly and that Notifications can reach their devices.

Publish Calendar

Select the views to display on the Member Portal for your Organization.



In each **Show to** field, select one radio button choice:

- **All record types**—All record types in your Organization are automatically selected.
- **Selected record type(s)**—Select the **Edit** link and the Select Record Type dialog is displayed. You can select All, or individual checkboxes of the desired record types. Select **OK** when done.

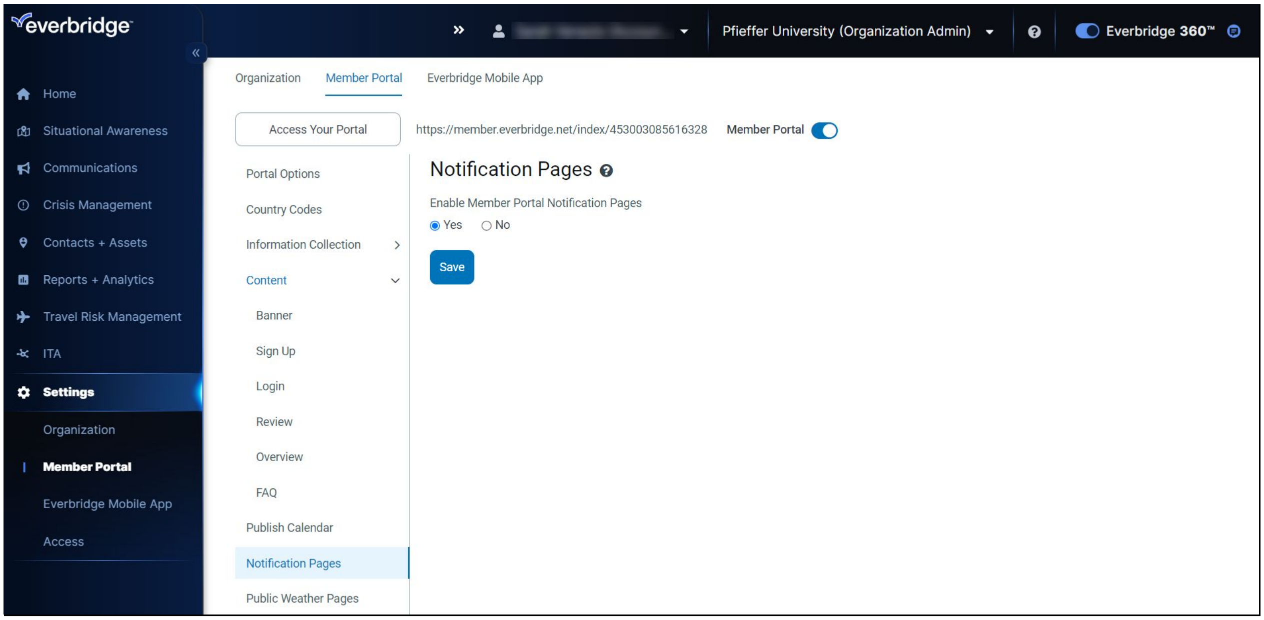
Contact Path Shown, select one of the following:

- Same as Manager Portal
- Custom: Select a maximum of two columns and they will be applied to your view.

In the Member Portal, you can access the calendars from the **Published Calendars** link or the On-Call Schedule link. When you see an Information icon next to the calendar name, hover the mouse over the icon to view the calendar description.

Notification Pages

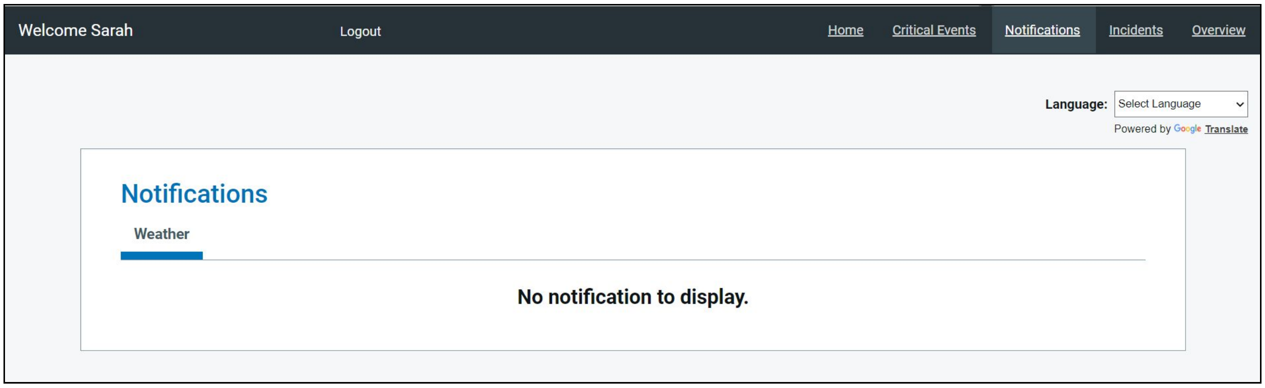
Enable **Member Portal Notification Pages**, **Yes** or **No**. For Public Member Portals, select the checkbox to **Include Social Sharing** options to display sharing options for Facebook, Twitter, Reddit, and Email Forwarding.



When a Notification (Standard, not Polling or Conference Bridge) is sent to the **Member Portal** publishing option, each member can view the message by clicking the Notifications link. From the General sub-tab, the members will see the title of the Notification and the body text. They can click **More** to see the entire Notification.

The following types of files are examples that can be displayed and downloaded from the Member Portal:

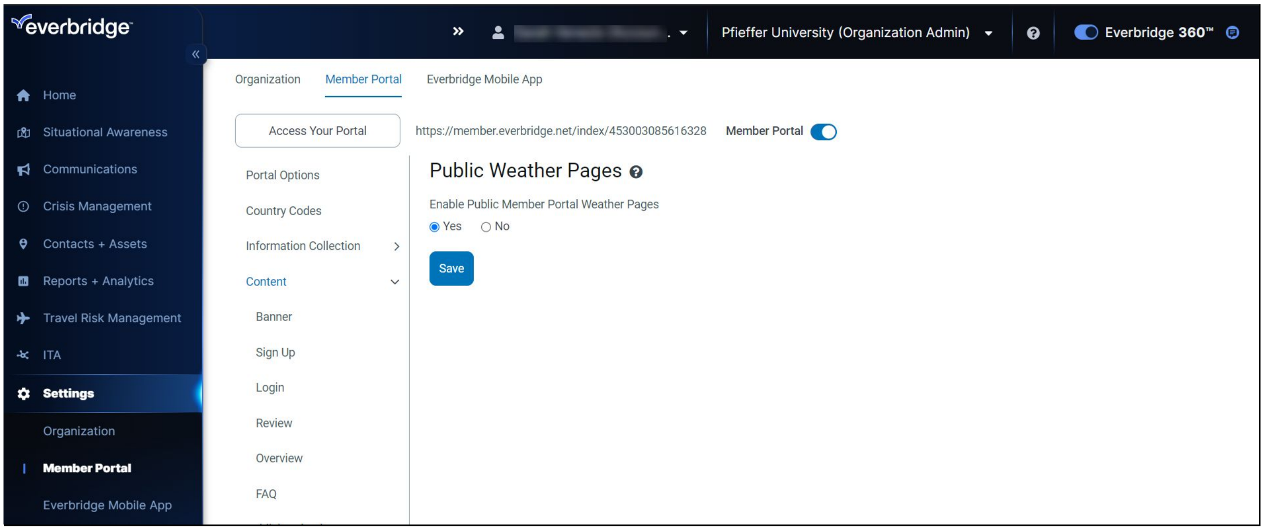
- JPG
- PNG
- GIF
- BMP
- PDF
- WAV
- XLSX



To remove the Notification from the Member Portal, the Administrator must deactivate it from the Notification Details page.

Public Weather Pages

Enable **Public Member Portal Weather Pages**, **Yes** or **No**. The default is Yes.

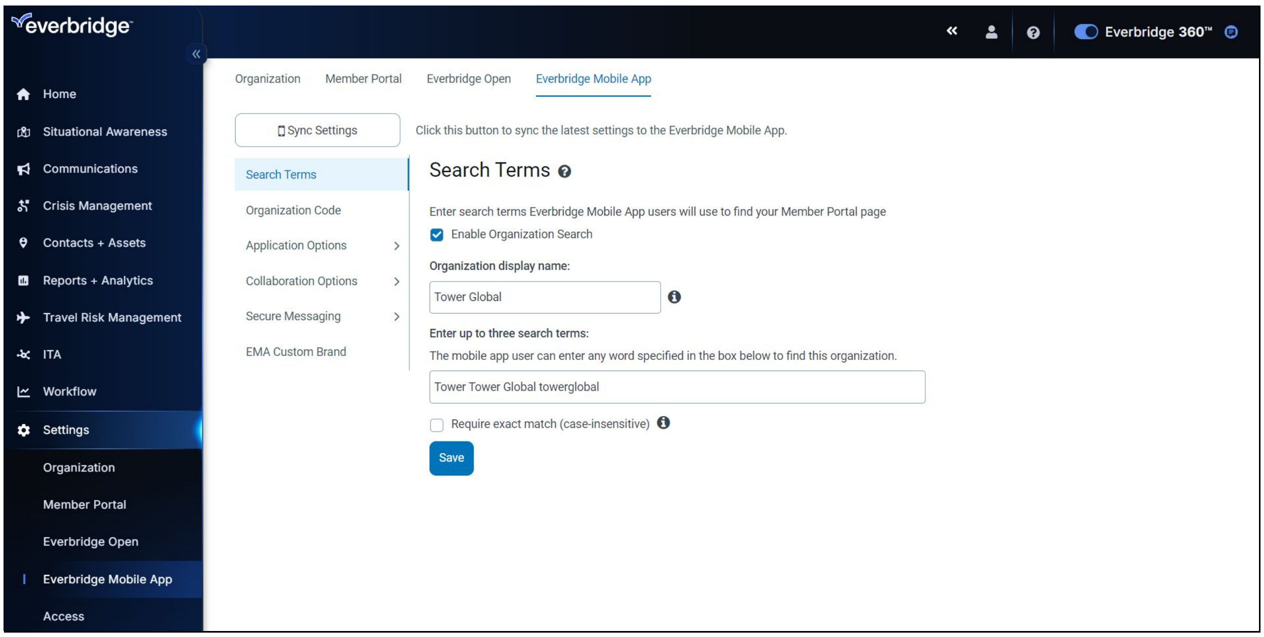


In the Member Portal, click **Notifications**, then the Weather sub-tab. The weather alerts are displayed. Click a link for weather details.

Search Terms

The Everbridge Mobile App feature allows you to search for up to three search terms, one of which must be your organization name, from your mobile device. This can be configured from **Settings** > **Everbridge Mobile App** > **Search Terms**. If desired, you can also require an exact match by selecting the checkbox.

Click the **Sync Settings** button to synchronize the latest settings to the Everbridge Mobile App.



Organization Code

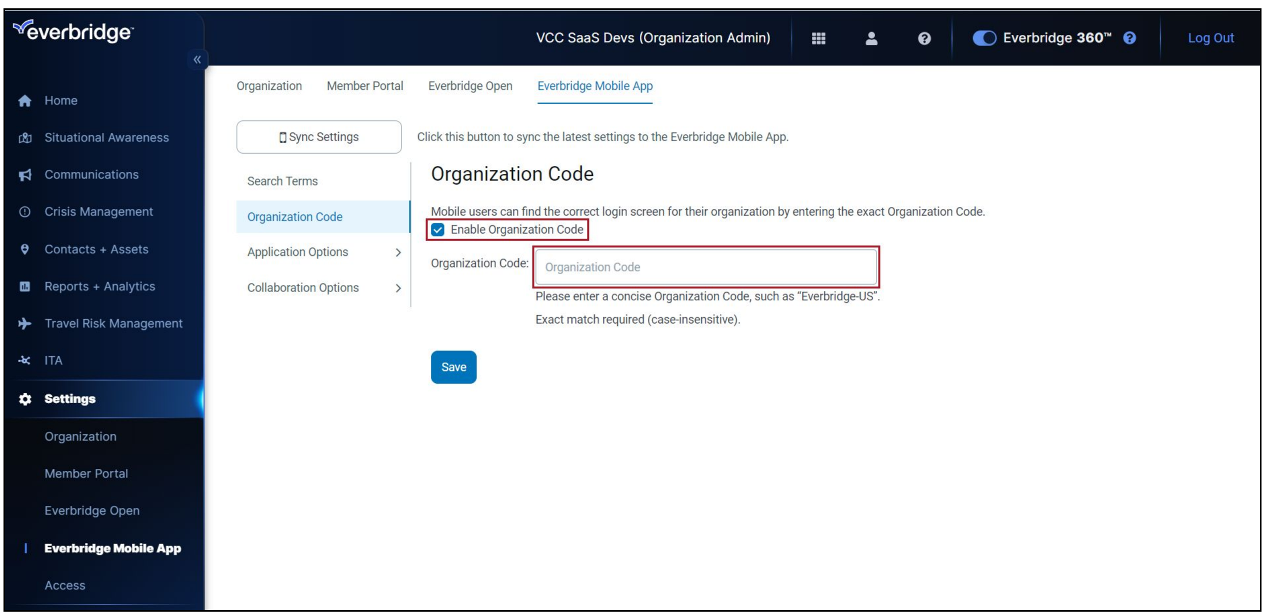
Communication recipients using the Everbridge 360™ Apps can find their Organization when first opening the app by searching for its unique **Organization Code**, which is set by Organization Administrators under **Settings** > **Organization** > **Everbridge Mobile App** > **Organization Code**.

NOTE: If desired, IT administrators may deploy an Organization Code to managed devices via Mobile Device Management (MDM).

Setting an Organization Code

To set an Organization Code:

1. On the **Organization Code** page, select the **Enable Organization Code** checkbox.
2. The **Organization Code** text field will activate, allowing you to enter the desired code.
3. Click **Save**.



Considerations

- Only one code can be set per Organization at a time.
- The code must be unique across all Organizations (including all tech stacks).
- The search query must match the code exactly, including case sensitivity.

- If the code is deleted or left blank, the Organization will not be returned in search results from either of the Everbridge 360™ Apps. This is how the Everbridge 360™ Apps can be disabled entirely.
- The Organization Code is only for the Everbridge 360™ Apps and won't affect the old Everbridge Mobile App.

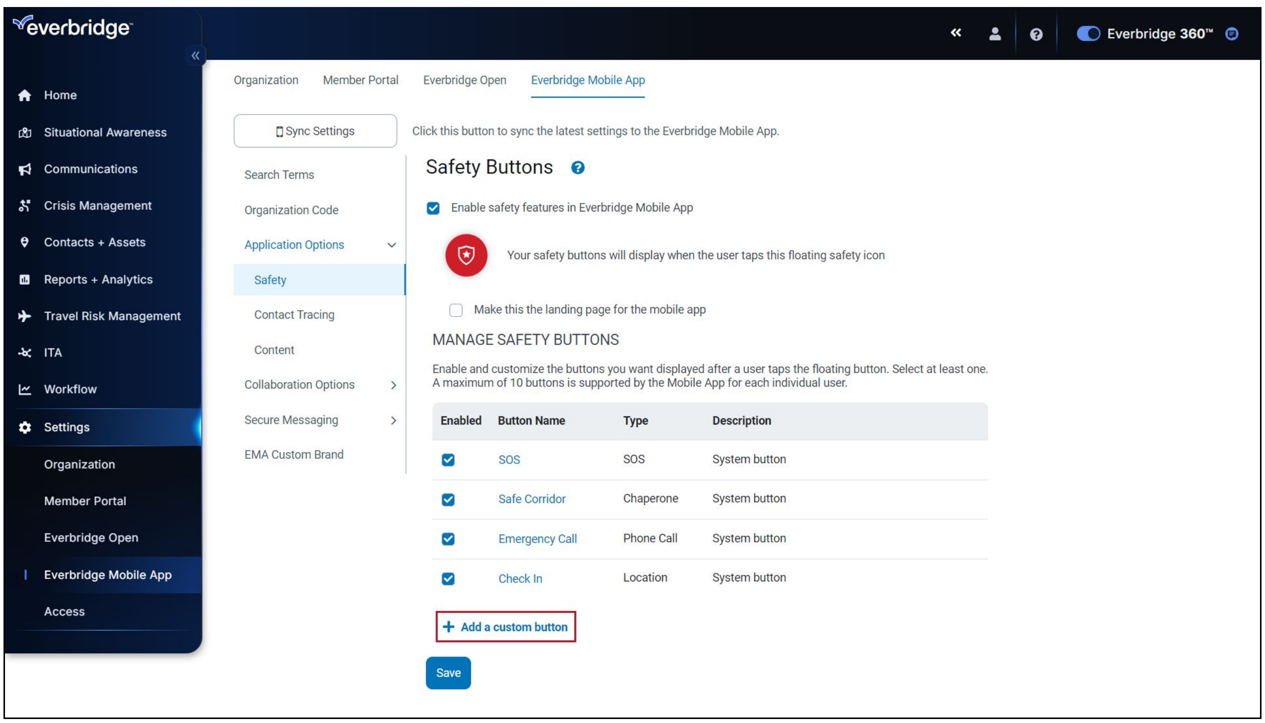
NOTE: See the Everbridge 360 Deployment page for more on deployment, installation, and troubleshooting.

Application Options

Safety

Use this option to enable the **Safety Connection** features that will be available in the Everbridge Mobile App. For more details about Safety Connection, see the Safety Connection User Guide.

> **NOTE:** The maximum number of Safety buttons is 60 (including system buttons and custom buttons). The minimum number of Custom buttons is 4, the maximum number of Custom buttons is 60, where the default value is 25 (including System buttons and Custom buttons). A maximum of 10 buttons can be shown on the Everbridge Mobile App (including System buttons and Custom buttons).



Four default Safety buttons are available in Everbridge Mobile App:

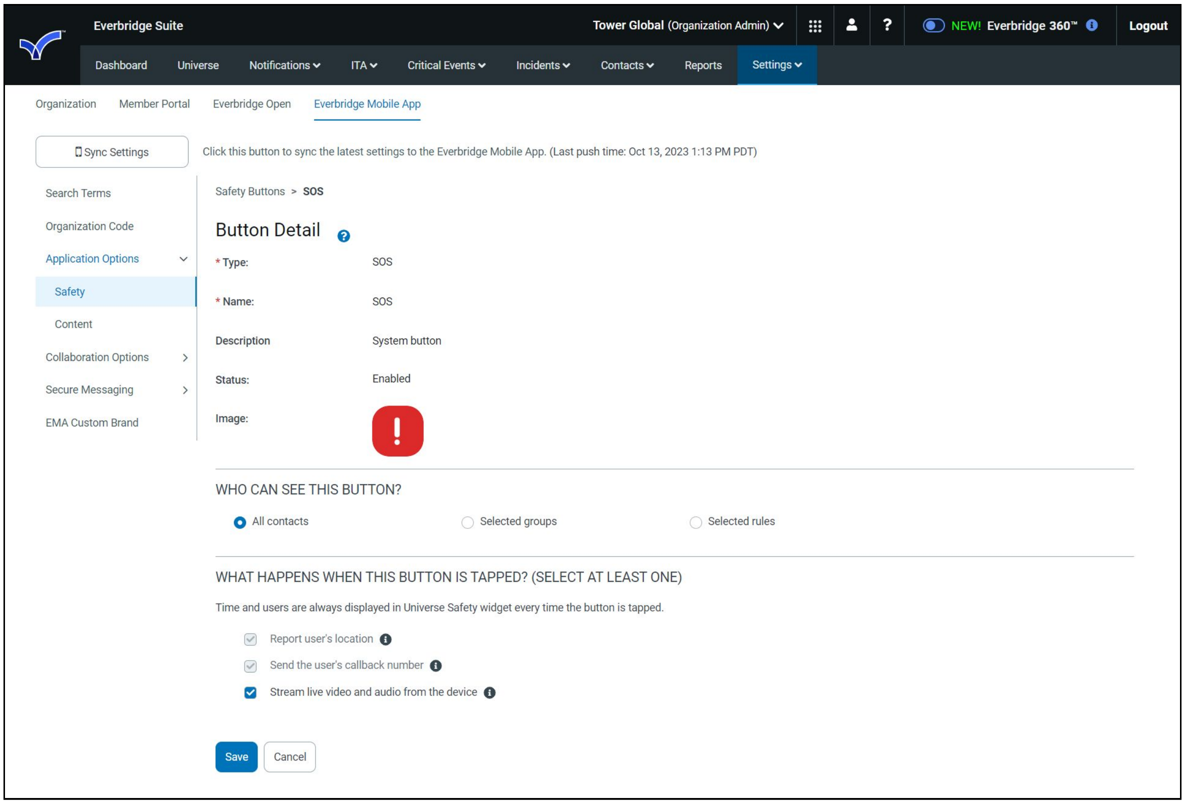
- **Check In** - Everbridge Mobile App users can voluntarily check in and report their location when, for instance, they feel they are in a potentially dangerous situation.
- **Safe Corridor** - Everbridge Mobile App users are asked to enter a preset code at regular time intervals. A missed report triggers an alert.

- **SOS** - This button triggers an SOS Alert. The recording of video and audio from the mobile device can be automatically started when this button is tapped.
- **Emergency Call** - This bridges the Everbridge Mobile App to a preset phone number.

Enable Safety Buttons

1. Navigate to **Settings** > **Everbridge Mobile App** > **Application Options** > **Safety** and make sure the checkbox: **Enable safety feature in Everbridge Mobile App.**
2. In the Everbridge Mobile App, the **Safety buttons** page is available when tapping the floating Safety icon. Optionally, select the checkbox: Make this the landing page for the mobile app. If this checkbox is selected:
    - The Mobile App will use the Safety Buttons page as the default page when the application starts.
    - After a period of inactivity of 15 minutes in the background, the Mobile App will automatically display that page when the app is in the foreground.

    If this checkbox is clear, Mobile App users will need to click to tap the floating Safety icon to access the Safety buttons page.
3. Enable any of the four default Safety buttons: SOS, Safe Corridor, Emergency Call, and Check-In by selecting the corresponding checkbox in the Enabled column.
4. Access the detailed configuration page of the button by clicking the button name. For example, see the SOS Button Detail page.



5. For any button that has been enabled, the contacts that can view or use the button the Everbridge Mobile App can be set in the Who can see this button? section. There are three mutually exclusive possibilities:
    - **All Contacts** - Any contact who has access to the Everbridge Mobile App will be able to use the button.
    - **Selected Groups** - One or more groups of contacts can be selected. At least one group must be selected. Only contacts who belong in the selected group(s) will be able to use the button.
    - **Selected Rules** - One or more rules can be selected. At least one rule must be selected. Only contacts who match the rule(s) definitions will be able to use the button.
6. Adjust the properties on each button. See Button Properties available for each button in the table below.
7. Click **Save** when done.

Configure Custom Safety Buttons

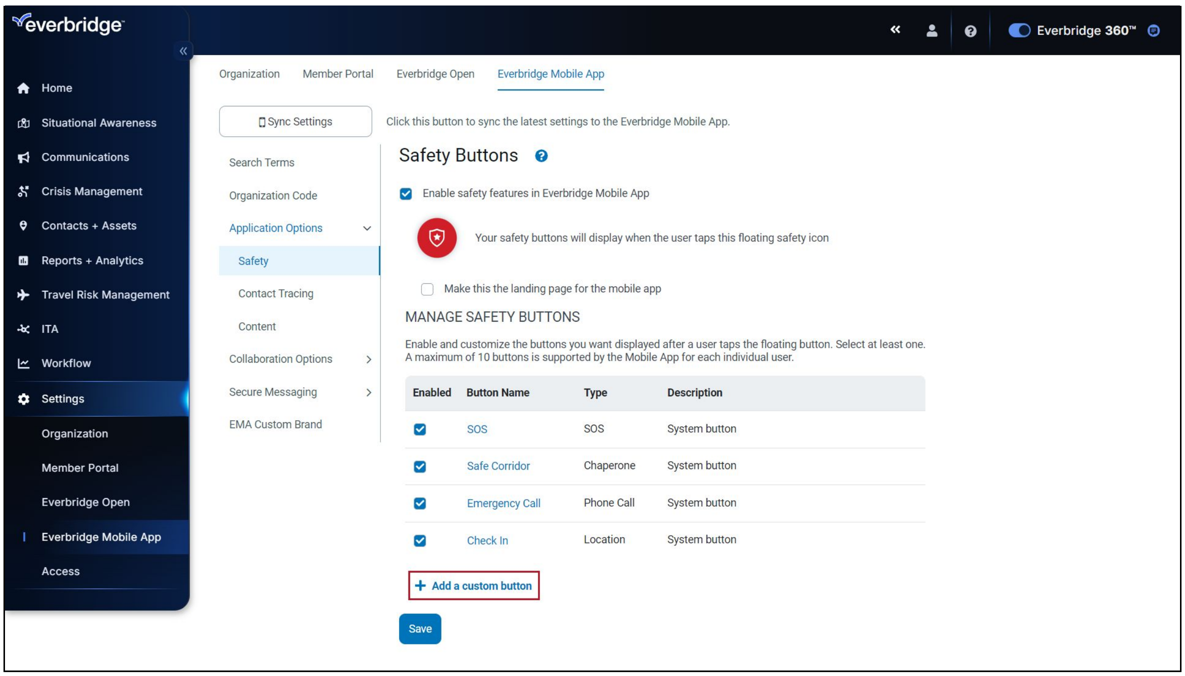
In addition to these four default Safety buttons, custom Safety buttons can be created. To do this:

1. Navigate to **Settings** > **Everbridge Mobile App** > **Application Options** > **Safety** and make sure the **Enable safety feature in Everbridge Mobile App** checkbox is selected.

2. In the Everbridge Mobile App, the Safety Buttons page is available when tapping the floating Safety icon. Optionally, select the Make this the landing page for the mobile app checkbox.

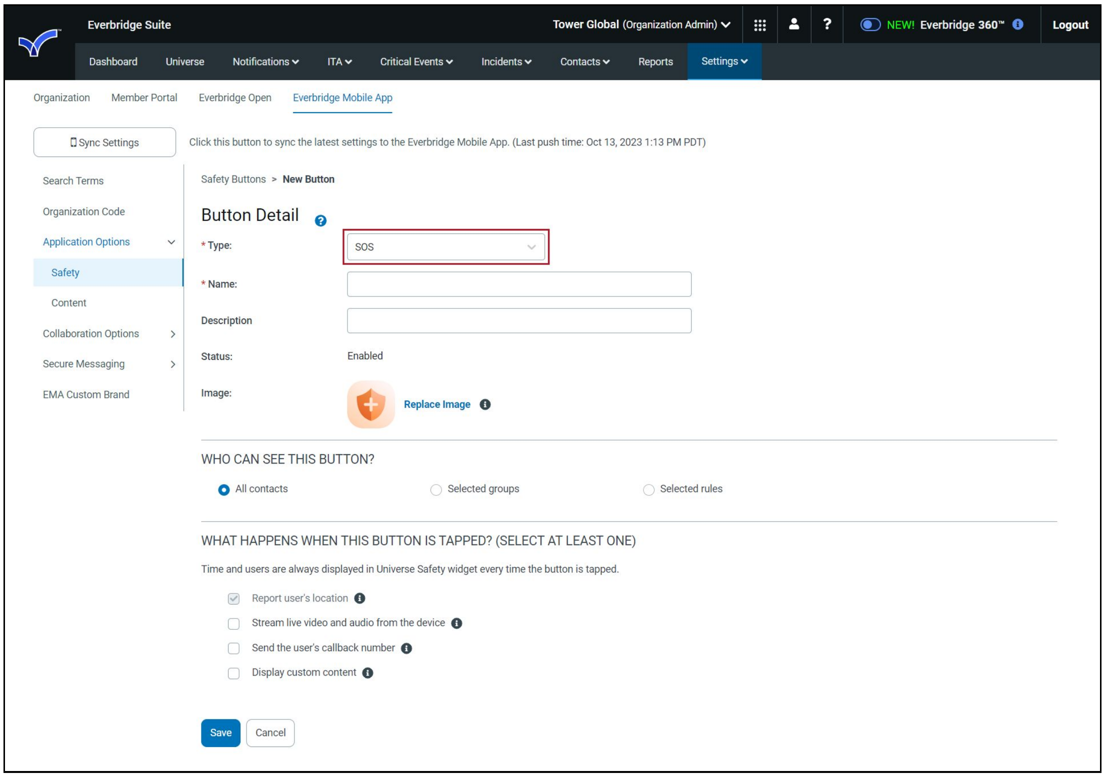
   If this checkbox is clear, Mobile App users will need to click to tap the floating Safety icon to access the Safety buttons page.

   - The mobile app will use the Safety buttons page as the default page when the application starts.
   - After a period of inactivity of 15 minutes in the background, the Mobile App will automatically display that page when the app is in the foreground.
3. Click **Add a custom button**.

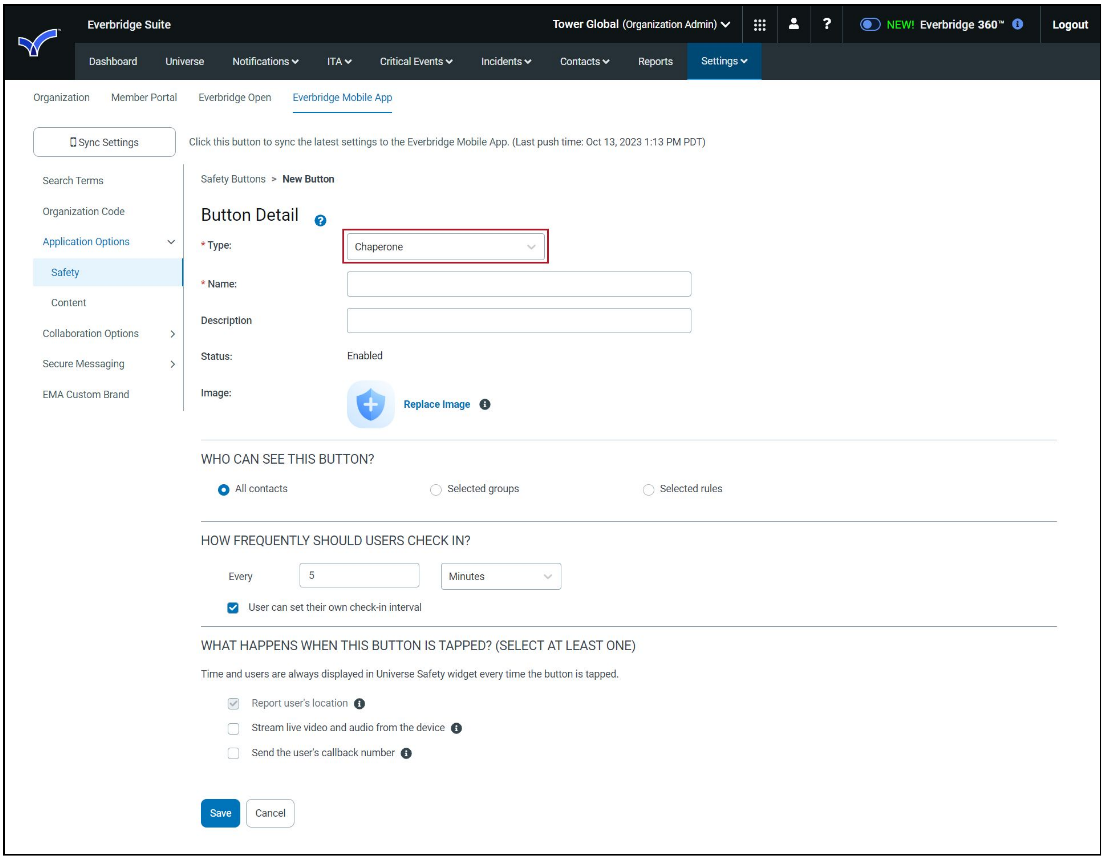


4. The **Button Detail** page appears. Select the button type from the drop-down list.
   - **SOS** - Trigger a SOS action.
   - **Chaperone** - Trigger a Chaperone/Safe Corridor action.
   - **Phone Call** - Trigger a phone call. There are about 240 countries from which to configure, including support phone numbers belonging to those countries.
   - **Location** - Trigger a check-in action.
   - **Content** - When the button is tapped, a Content page is displayed on the mobile device. This action is not visible on the Universe page and cannot trigger a threshold.
   - **Custom Form** - When the button is tapped, a questionnaire is displayed. When submitted, an Incident report is triggered.
   - **Hyperlink** - When the button is tapped, the default web browser opens using the hyperlink value.

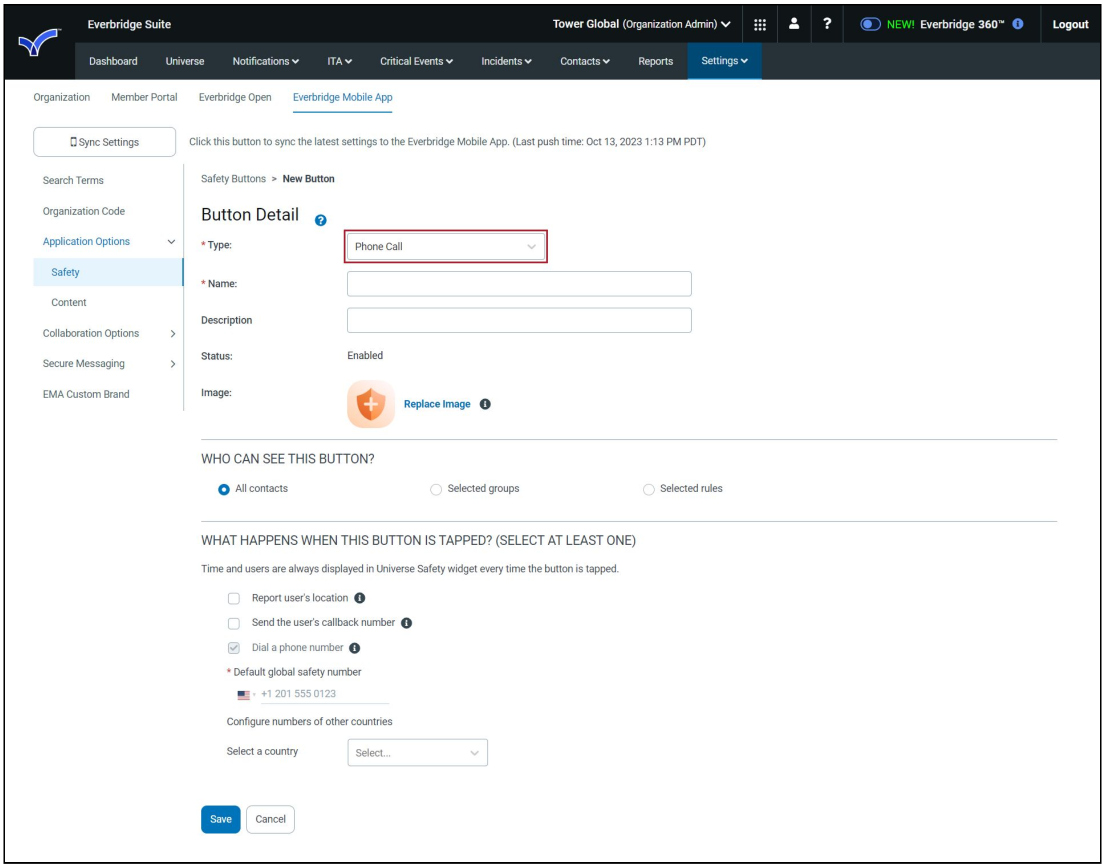
5. See the following example Button Detail pages for each button type.
   - **SOS**



   - **Chaperone**


Everbridge Suite
Tower Global (Organization Admin)
NEW! Everbridge 360™
Logout
Dashboard
Universe
Notifications
ITA
Critical Events
Incidents
Contacts
Reports
Settings
Organization
Member Portal
Everbridge Open
Everbridge Mobile App
Sync Settings
Click this button to sync the latest settings to the Everbridge Mobile App. (Last push time: Oct 13, 2023 1:13 PM PDT)
Search Terms
Organization Code
Application Options
Safety
Content
Collaboration Options
Secure Messaging
EMA Custom Brand
Safety Buttons > New Button
Button Detail
* Type:
Chaperone
* Name:
Description
Status:
Enabled
Image:
Replace Image
WHO CAN SEE THIS BUTTON?
All contacts
Selected groups
Selected rules
HOW FREQUENTLY SHOULD USERS CHECK IN?
Every
5
Minutes
User can set their own check-in interval
WHAT HAPPENS WHEN THIS BUTTON IS TAPPED? (SELECT AT LEAST ONE)
Time and users are always displayed in Universe Safety widget every time the button is tapped.
Report user's location
Stream live video and audio from the device
Send the user's callback number
Save
Cancel

- **Phone Call**


Everbridge Suite
Tower Global (Organization Admin)
NEW! Everbridge 360™
Logout
Dashboard
Universe
Notifications
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Critical Events
Incidents
Contacts
Reports
Settings
Organization
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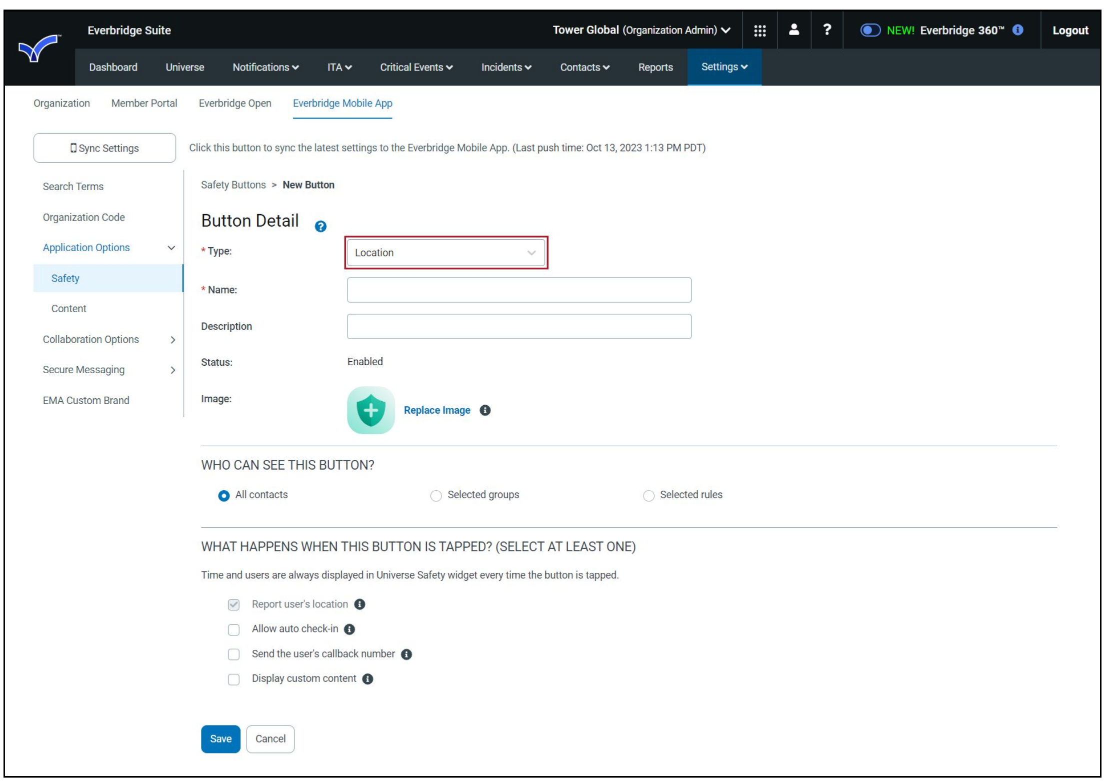
Search Terms
Organization Code
Application Options
Safety
Content
Collaboration Options
Secure Messaging
EMA Custom Brand
Safety Buttons > New Button
Button Detail
* Type:
Phone Call
* Name:
Description
Status:
Enabled
Image:
Replace Image
WHO CAN SEE THIS BUTTON?
All contacts
Selected groups
Selected rules
WHAT HAPPENS WHEN THIS BUTTON IS TAPPED? (SELECT AT LEAST ONE)
Time and users are always displayed in Universe Safety widget every time the button is tapped.
Report user's location
Send the user's callback number
Dial a phone number
* Default global safety number
+1 201 555 0123
Configure numbers of other countries
Select a country
Select...
Save
Cancel

- **Location**


Everbridge Suite
Tower Global (Organization Admin)
NEW! Everbridge 360™
Logout
Dashboard
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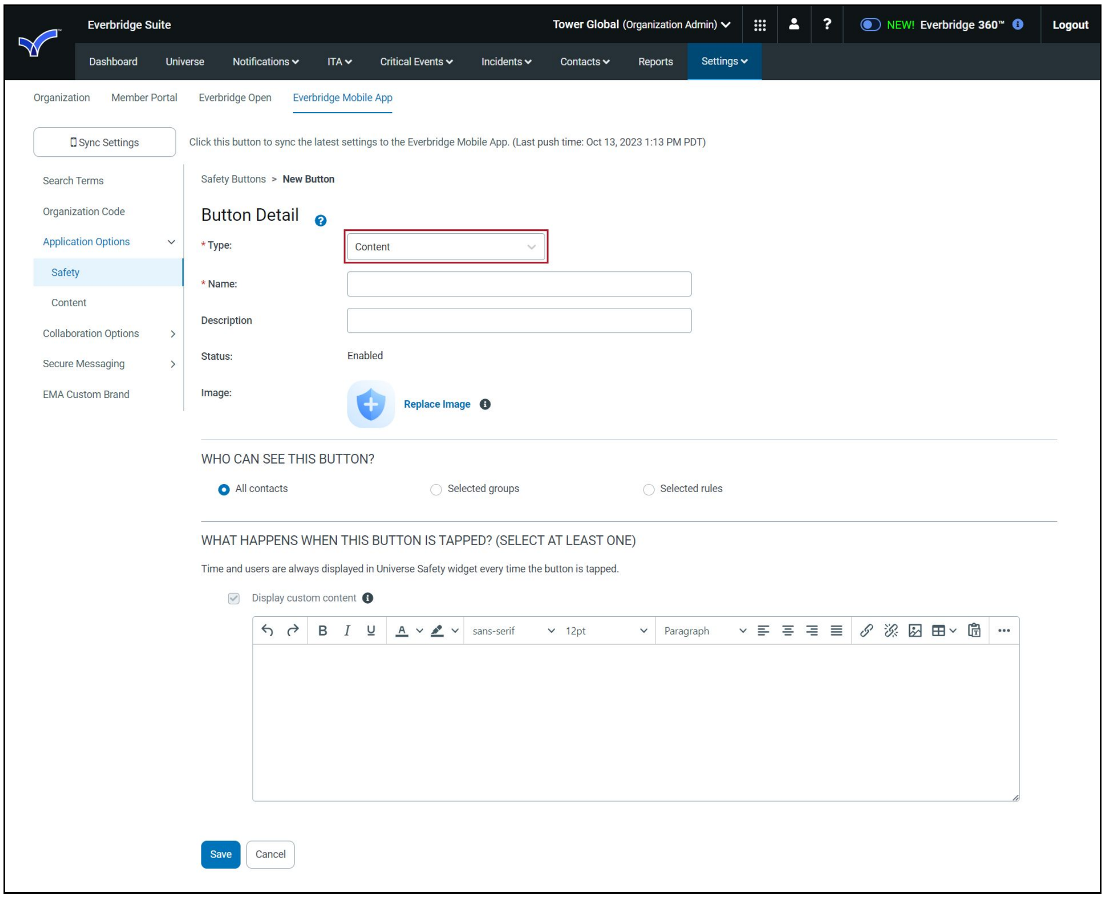
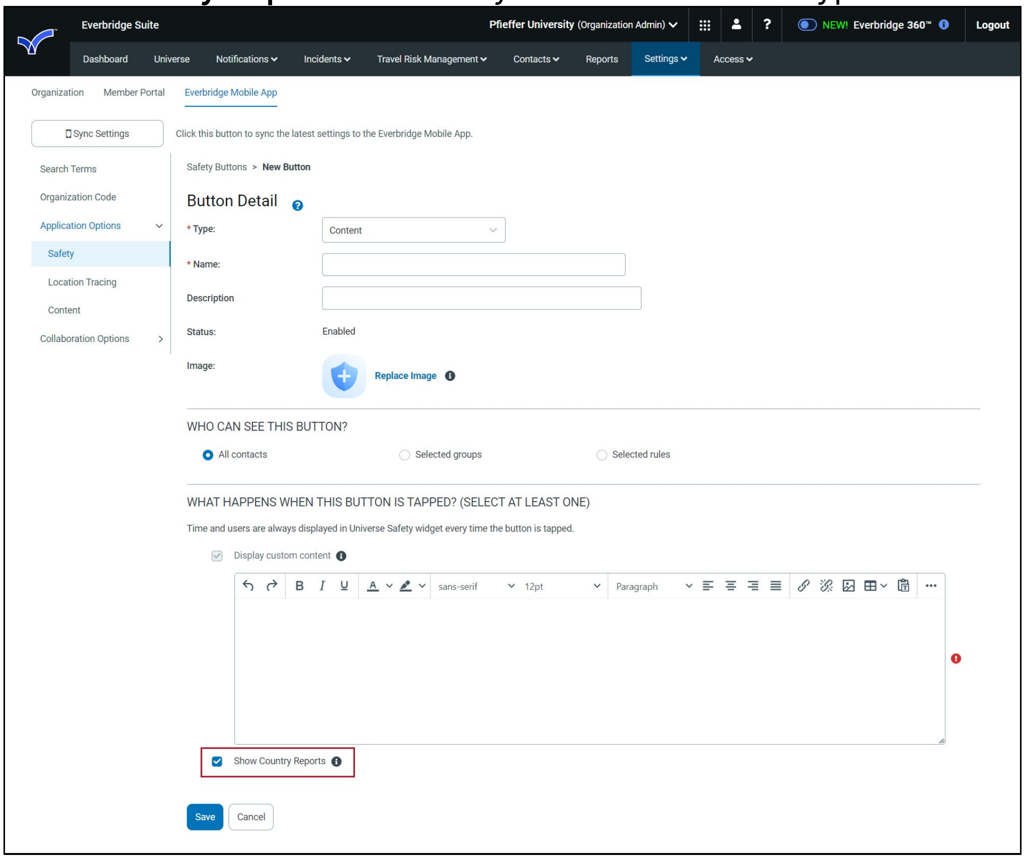
Critical Events
Incidents
Contacts
Reports
Settings
Organization
Member Portal
Everbridge Open
Everbridge Mobile App
Sync Settings
Click this button to sync the latest settings to the Everbridge Mobile App. (Last push time: Oct 13, 2023 1:13 PM PDT)
Search Terms
Organization Code
Application Options
Safety
Content
Collaboration Options
Secure Messaging
EMA Custom Brand
Safety Buttons > New Button
Button Detail
* Type:
Location
* Name:
Description
Status:
Enabled
Image:
Replace Image
WHO CAN SEE THIS BUTTON?
All contacts
Selected groups
Selected rules
WHAT HAPPENS WHEN THIS BUTTON IS TAPPED? (SELECT AT LEAST ONE)
Time and users are always displayed in Universe Safety widget every time the button is tapped.
Report user's location
Allow auto check-in
Send the user's callback number
Display custom content
Save
Cancel

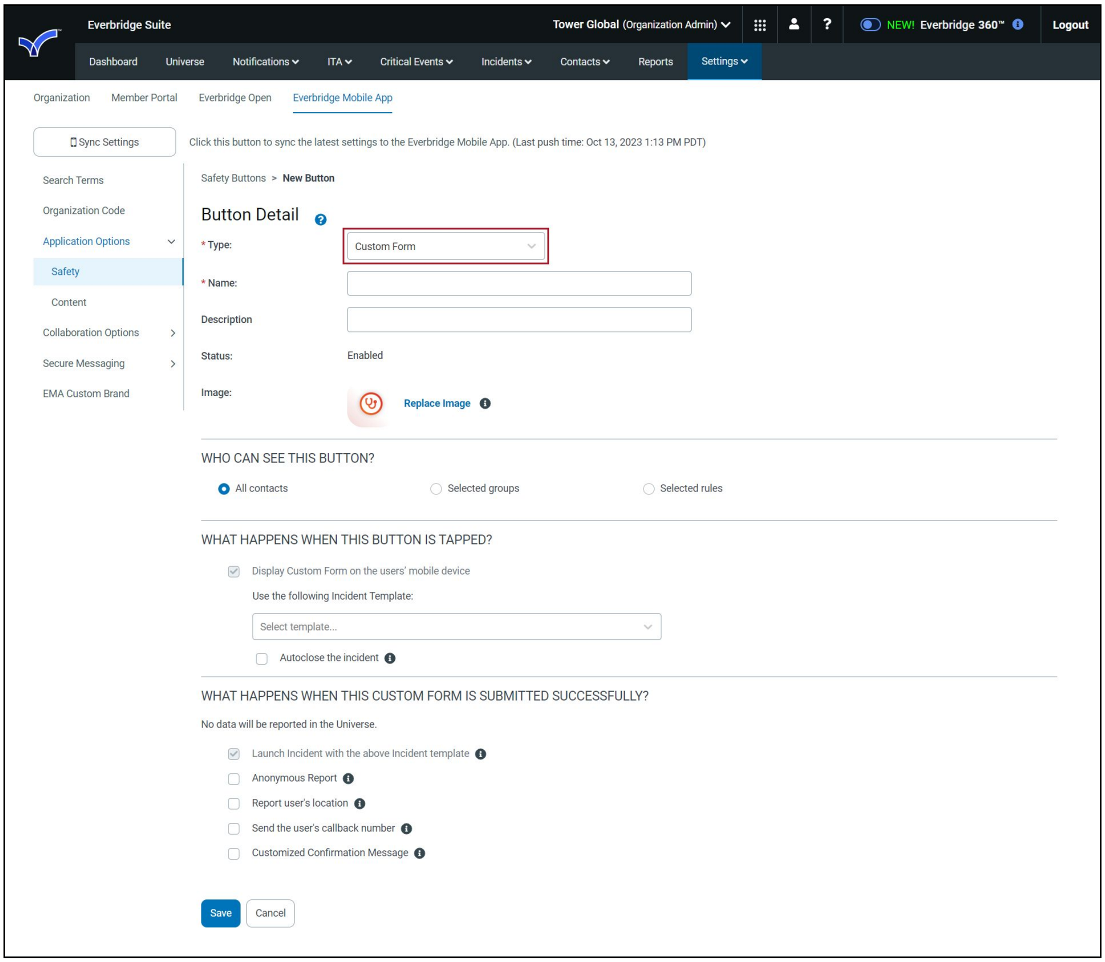
- **Content**



- Travel Protector customers will also see an additional option titled **Show Country Reports** when they select the **Content** type.



- **Custom Form**


Everbridge Suite
Tower Global (Organization Admin)
NEW! Everbridge 360™
Logout
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Search Terms
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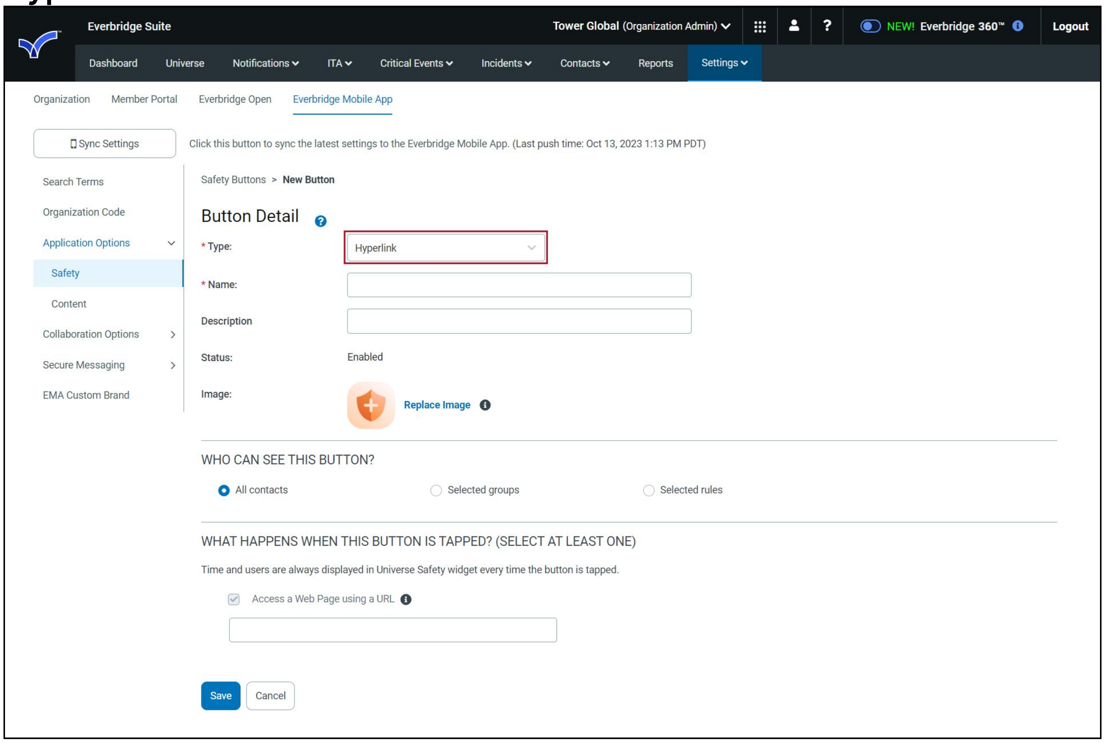
Application Options
Safety
Content
Collaboration Options
Secure Messaging
EMA Custom Brand
Safety Buttons > New Button
Button Detail
* Type:
Custom Form
* Name:
Description
Status:
Enabled
Image:
Replace Image
WHO CAN SEE THIS BUTTON?
All contacts
Selected groups
Selected rules
WHAT HAPPENS WHEN THIS BUTTON IS TAPPED?
Display Custom Form on the users' mobile device
Use the following Incident Template:
Select template...
Autoclose the incident
WHAT HAPPENS WHEN THIS CUSTOM FORM IS SUBMITTED SUCCESSFULLY?
No data will be reported in the Universe.
Launch Incident with the above Incident template
Anonymous Report
Report user's location
Send the user's callback number
Customized Confirmation Message
Save
Cancel

- **Hyperlink**



6. Once the type has been selected, enter a name and an optional description.
7. Optionally, click **Replace image** to upload a different image used on the Everbridge Mobile App. The recommended size for images is 256x256 pixels.
8. For any button that has been enabled, the contacts that can view or use the button in the Everbridge Mobile App can be set in the **Who can see this button?** section. There are three mutually exclusive possibilities:
   - **All Contacts** - Any contact who has access to the Everbridge Mobile App will be able to use the button.
   - **Selected groups** - One or more groups of contacts can be selected. At least one group must be selected. Only contacts who belong to the selected group(s) will be able to use the button.
   - **Selected Rules** - One or more rules can be selected. At least one rule must be selected. Only contacts who match the rule(s) definitions will be able to use the button.
9. Adjust the properties on each button. See Button Properties available for each button.
10. Click **Save** when done.

Button Properties

Property	System Buttons	Custom Buttons

Allow auto check-in. When selected, it is enabled and cannot be cleared. Auto check-in will always put into the Safety Settings when using the default Check-In button.	Check-In	Location
Report User's location. The user's location is reported to the server and used: • In the Universe to locate the position of the event (SOS, Safe Corridor) • In the Safety threshold as a criteria **NOTE:** For default buttons, custom Location, custom Chaperone, and custom SOS buttons, this option cannot be cleared.	SOS Safe Corridor Emergency Call Check-In	SOS Chaperone Phone Call Location Self-Report Custom Form
Send the user's callback number. The callback number is a setting of the Everbridge Mobile App that can be manually set by the Mobile App user. If set, this information is brought back to the server when the button is tapped and displayed on the Universe page. NOTE: For default buttons, this option cannot be cleared.	SOS Safe Corridor Emergency Call	SOS Chaperone Phone Call Location Custom Form
Stream live video and audio from the device. If selected, video and audio recording will start when the button is tapped on the mobile device and streamed to the server. The video with audio will be available from the Universe page.	SOS	SOS Chaperone
Dial a phone number. When the button is tapped, a call will be made. A global safety number must be entered. Up to 20 additional numbers can be set on a country-by-country basis. If the device is in a country for which a number has been set, that number will be dialed. If the device is in a country for which no specific number has been set, the global safety number will be used.	Emergency Call	Phone Call
Use the following Incident Template. An Incident template is attached to the custom		Self-Report Custom Form

button. Once tapped, a questionnaire made of the Incident template variables will be displayed to the Everbridge Mobile App users. Once submitted, the Incident will be triggered with the variables filled with the answers to the questionnaire.		
Autoclose the Incident. Automatically close the Incident after the notification goes out. This option is the equivalent of the "CLOSE Incident after successful send" option available on Incidents.		Self-Report Custom Form
Anonymous Report. This option will hide all the information related to the Everbridge Mobile App users using the button. Their information will not be available in the Manager Portal.		Custom Form
How frequently should users check in? The safe corridor Check-in interval can be set in minutes or seconds. This interval is the maximum time allowed for Everbridge Mobile App users to enter the preset code once they have tapped the Safe Corridor button and started the feature on their device. The default value is 5 minutes. Past this time, an alert will be generated.	Safe Corridor	Chaperone
Display custom content. This option enables the display of content in the Everbridge Mobile App when the button is tapped.	Content	SOS Location Content Self-Report Custom Form
Show Country Reports. When selected, this option enables the display of a search page under the custom content in the Everbridge Mobile App when the button is tapped.		Content

Contact Tracing

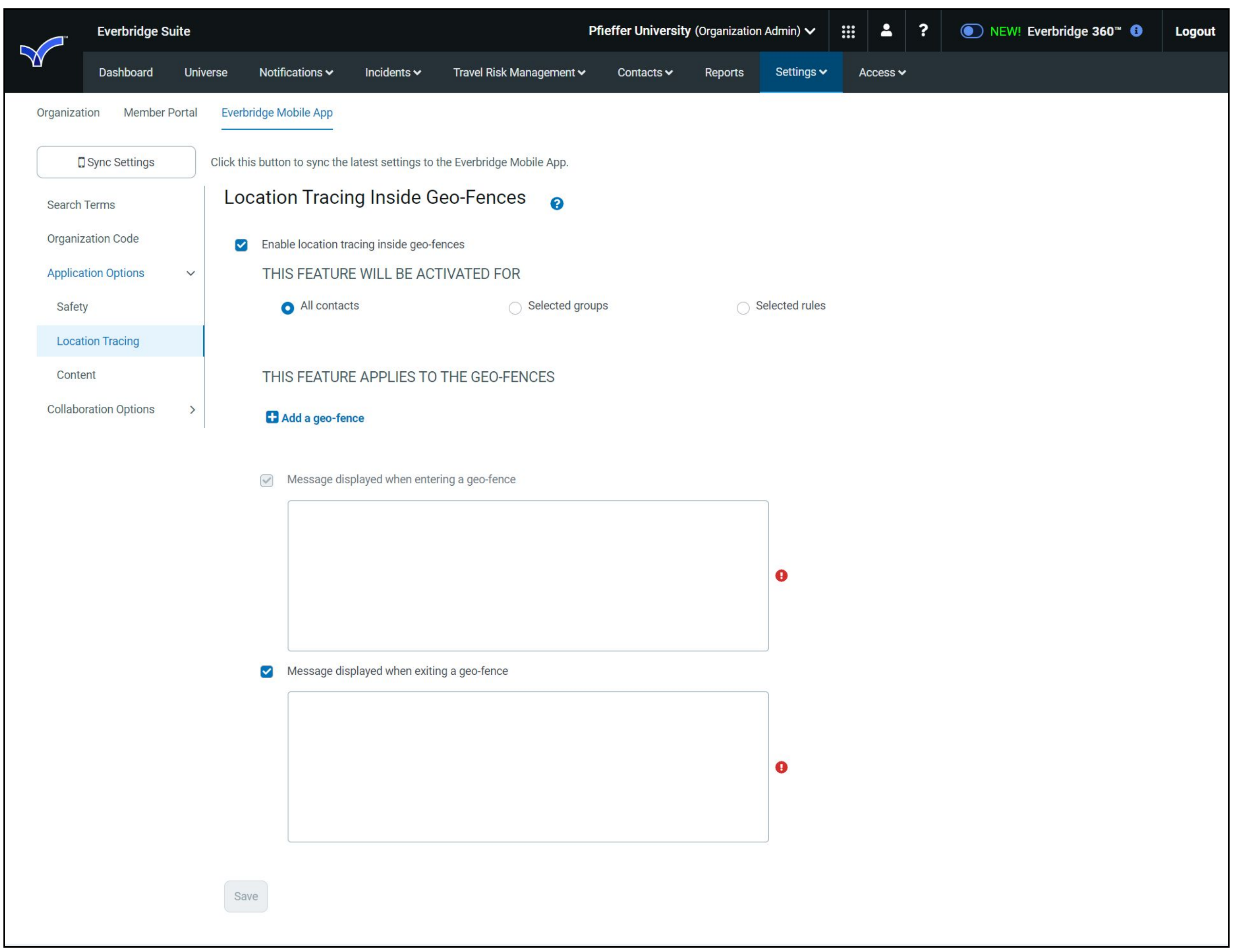
This page enables the activation of proximity-based contact tracing. Select the checkbox of the items you want or enter the required values.

- **Enable Mobile App Bluetooth Proximity Tracing** - This will activate the feature on all devices installed with the Everbridge Mobile App.

- **This feature will be activated for** - Select the radio button corresponding to the contacts you want activated for contact tracing.
- **Enable app to notify mobile users after Exposure Events** - Once a contact has self-reported positive, contacts that are at risk, identified through the proximity tracing feature will be notified. The text of the notification can be entered below the checkbox.
- **Trigger Incident after Exposure Events** - For each contact that is at risk, identified through the proximity tracing feature, an Incident will be triggered using the selected template. Optionally, the Incident can be automatically closed as soon as the notification goes out.

Location Tracing

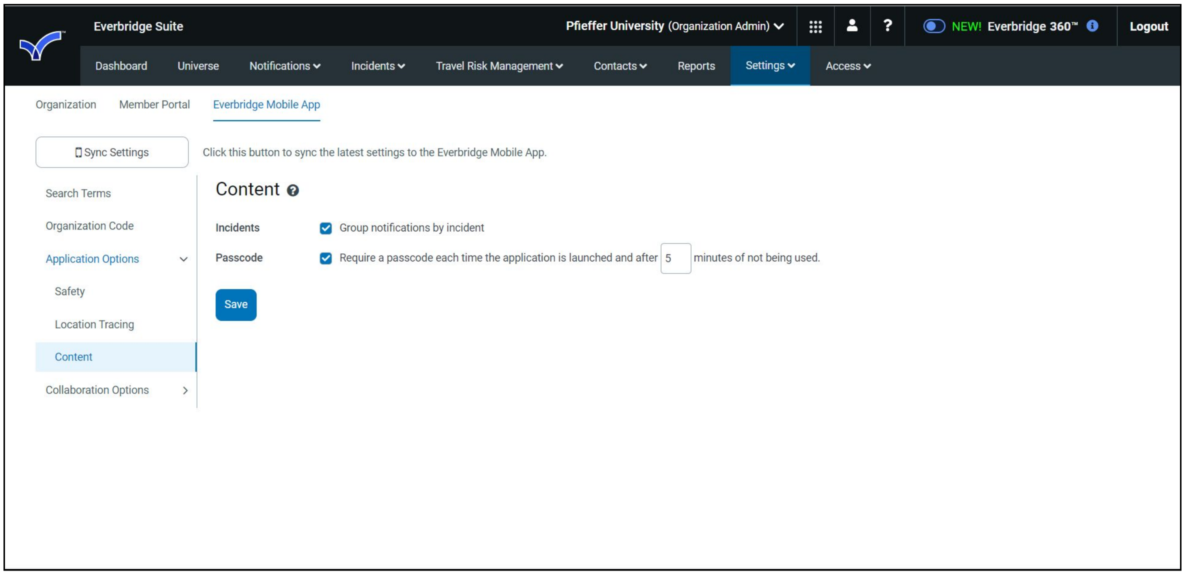
Create geo-fences and automatically get detailed location information when contacts are within these geo-fences. The privacy of the contacts is preserved as their location data is not exposed outside the predefined geo-fence. A push notification is always sent to contacts when they enter such geo-fences.



Content

Select the checkbox of the items you want.

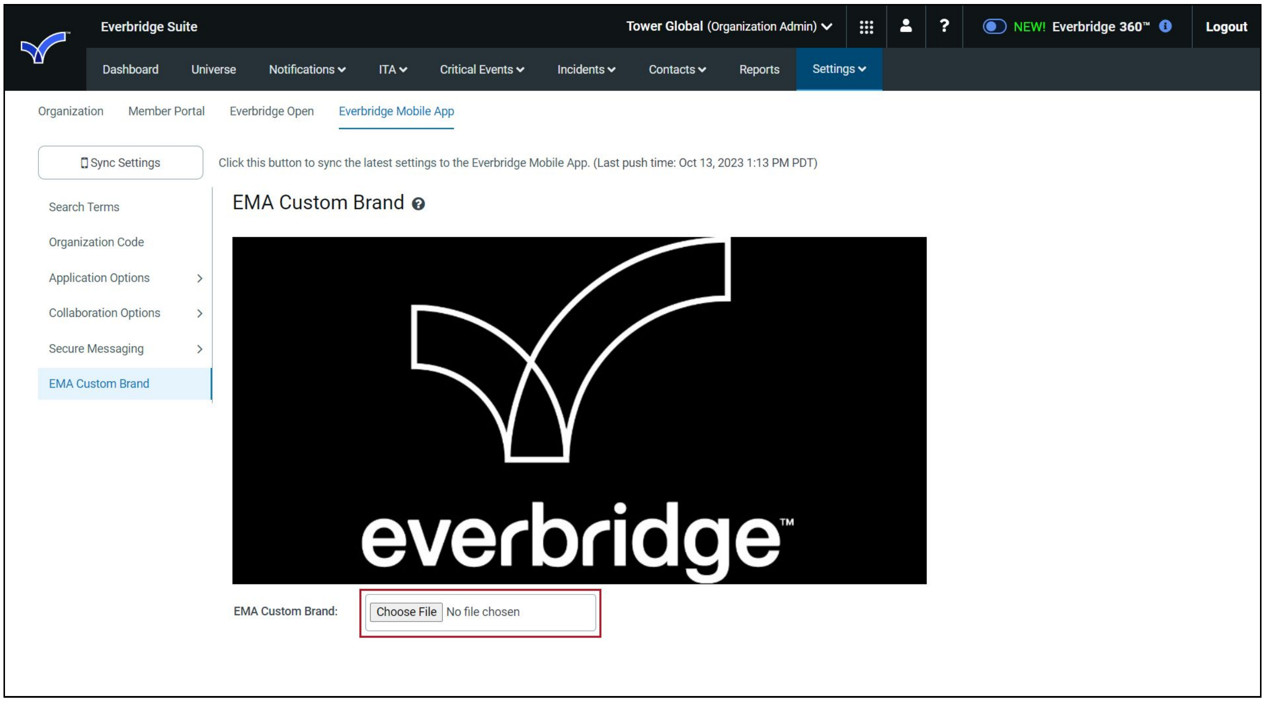
- **Incidents** - Group notifications by Incident
- **Subscriptions** - Allow subscribers to be anonymous
- **Passcode** - Require a passcode each time the application is launched and after a time (in minutes) of not being used. You can change the time from 5 minutes.



EMA Custom Brand

If enabled for your Organization by Support, you can choose a custom Everbridge Mobile App (EMA) banner. The image must be **840 x 420** with a ratio of width to height 2:1.

If you want to change your custom brand, click **Choose File** and select the new image. Click **Save** when you are done.


Everbridge Suite
Tower Global (Organization Admin)
NEW! Everbridge 360™
Logout
Dashboard
Universe
Notifications
ITA
Critical Events
Incidents
Contacts
Reports
Settings
Organization
Member Portal
Everbridge Open
Everbridge Mobile App
Sync Settings
Click this button to sync the latest settings to the Everbridge Mobile App. (Last push time: Oct 13, 2023 1:13 PM PDT)
Search Terms
Organization Code
Application Options
Collaboration Options
Secure Messaging
EMA Custom Brand
EMA Custom Brand
everbridge™
EMA Custom Brand:
Choose File
No file chosen

Secure Messaging

Secure Messaging is visible only if it is enabled for your Organization. It provides compliance with industry regulations such as HIPAA (Health Insurance Portability and Accountability Act). This means hospitals and other healthcare clients can use the Everbridge Mobile application for their Secure Messaging needs, for example.

Enabling Secure Messaging

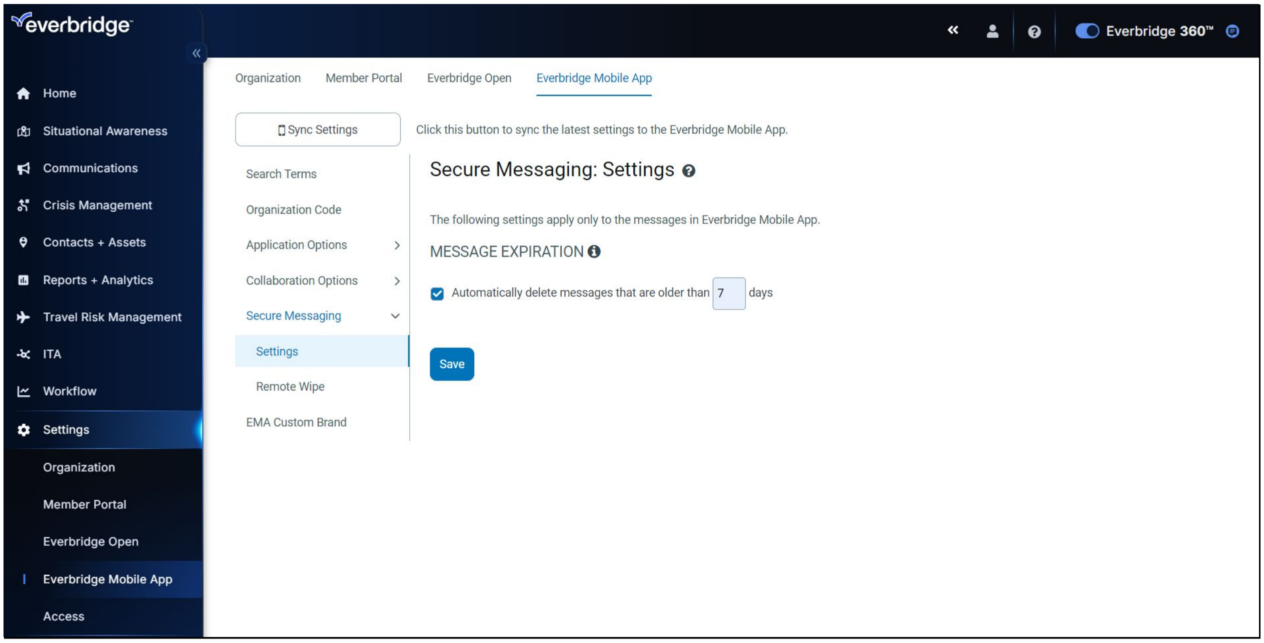
To allow a Secure Messaging user to receive Notifications:

1. Add the user to the Organization as a Contact. Secure Messaging Users are not Contacts until you add them.
2. Send the contact a Member Portal Registration Invitation. The contact joins the Member Portal with a unique username/password and then uses it to log in.

NOTE: To receive Notifications, the users must be logged in with their Member credentials for the Organization. Alternatively, the users may sign in with their Single Sign-On (SSO) credentials. Or, the users can be sent a Quick Registration invitation where they tap on the link in the email from their mobile device, which launches the app and walks them through the registration process in the app itself.

Settings

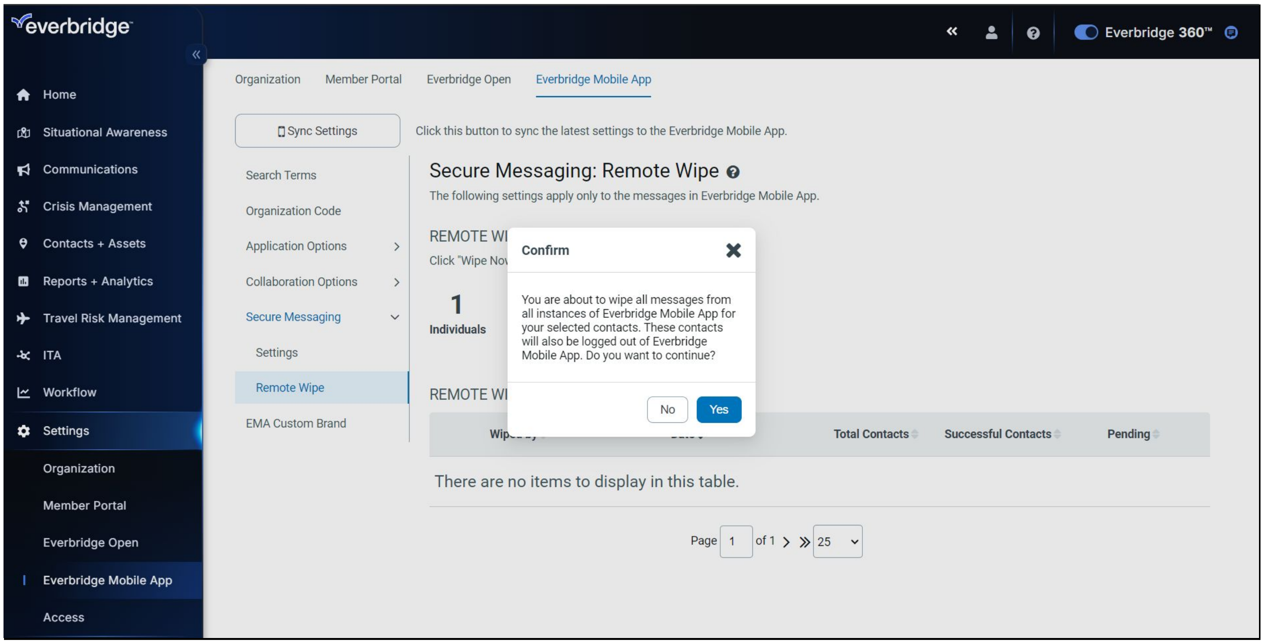
The Secure Messaging settings apply only to the messages in the Everbridge Mobile application. The **Message Expiration** feature removes all messages sent to and from the Everbridge Mobile application after the message has been stored on all Everbridge Mobile applications for the specified period of time. (Select the checkbox and enter a value of 1-180 days.)



Remote Wipe

The **Remote Wipe and Logout** feature wipes out all messages sent to and from the Everbridge Mobile app for the contacts you select. These contacts will also be logged out of the Everbridge Mobile App and will need to enter their user names and passwords again in order to receive new messages.

Select your contacts and click **OK**. Then, select the **Wipe Now** button, and click **OK** to confirm that the messages will be wiped out, and that the contacts will also be logged out of the Everbridge Mobile app. Then, click **Sync Settings** at the top of the left-hand menu.



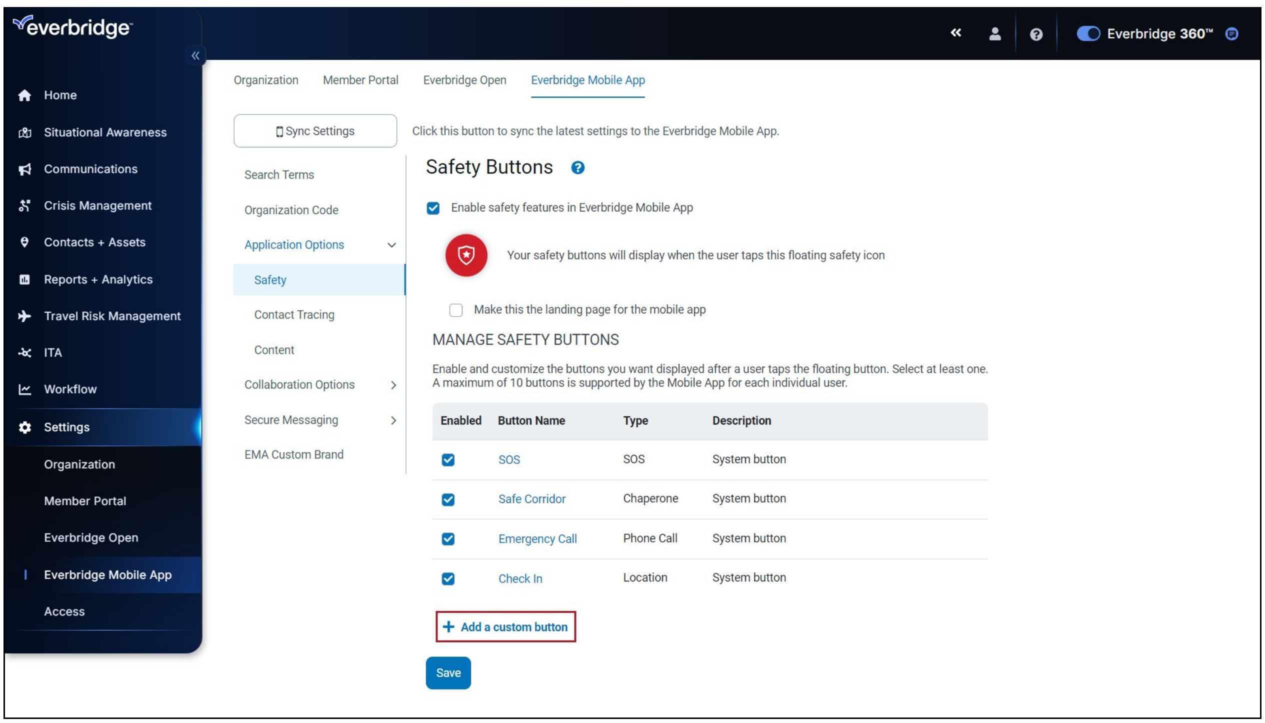
The **Successful Contacts** column shows the number of messages that were wiped. The **Pending** column shows the number of messages that are yet to be wiped. That is, the mobile device might be off or the Everbridge Mobile app might not be launched.

Application Options

Safety

Use this option to enable the **Safety Connection** features that will be available in the Everbridge Mobile App. For more details about Safety Connection, see the Safety Connection User Guide.

> **NOTE:** The maximum number of Safety buttons is 60 (including system buttons and custom buttons). The minimum number of Custom buttons is 4, the maximum number of Custom buttons is 60, where the default value is 25 (including System buttons and Custom buttons). A maximum of 10 buttons can be shown on the Everbridge Mobile App (including System buttons and Custom buttons).



Four default Safety buttons are available in Everbridge Mobile App:

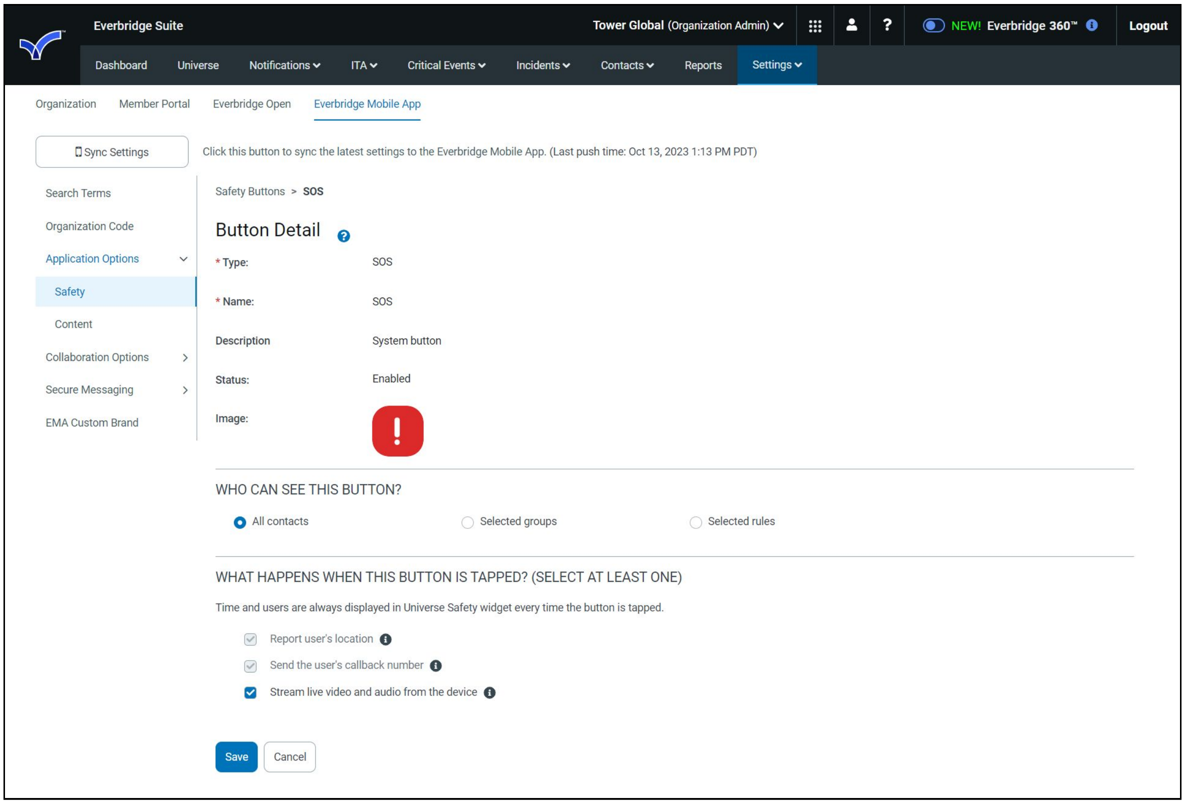
- **Check In** - Everbridge Mobile App users can voluntarily check in and report their location when, for instance, they feel they are in a potentially dangerous situation.
- **Safe Corridor** - Everbridge Mobile App users are asked to enter a preset code at regular time intervals. A missed report triggers an alert.

- **SOS** - This button triggers an SOS Alert. The recording of video and audio from the mobile device can be automatically started when this button is tapped.
- **Emergency Call** - This bridges the Everbridge Mobile App to a preset phone number.

Enable Safety Buttons

1. Navigate to **Settings** > **Everbridge Mobile App** > **Application Options** > **Safety** and make sure the checkbox: **Enable safety feature in Everbridge Mobile App.**
2. In the Everbridge Mobile App, the **Safety buttons** page is available when tapping the floating Safety icon. Optionally, select the checkbox: Make this the landing page for the mobile app. If this checkbox is selected:
    - The Mobile App will use the Safety Buttons page as the default page when the application starts.
    - After a period of inactivity of 15 minutes in the background, the Mobile App will automatically display that page when the app is in the foreground.

    If this checkbox is clear, Mobile App users will need to click to tap the floating Safety icon to access the Safety buttons page.
3. Enable any of the four default Safety buttons: SOS, Safe Corridor, Emergency Call, and Check-In by selecting the corresponding checkbox in the Enabled column.
4. Access the detailed configuration page of the button by clicking the button name. For example, see the SOS Button Detail page.



5. For any button that has been enabled, the contacts that can view or use the button the Everbridge Mobile App can be set in the Who can see this button? section. There are three mutually exclusive possibilities:
   - **All Contacts** - Any contact who has access to the Everbridge Mobile App will be able to use the button.
   - **Selected Groups** - One or more groups of contacts can be selected. At least one group must be selected. Only contacts who belong in the selected group(s) will be able to use the button.
   - **Selected Rules** - One or more rules can be selected. At least one rule must be selected. Only contacts who match the rule(s) definitions will be able to use the button.
6. Adjust the properties on each button. See Button Properties available for each button in the table below.
7. Click **Save** when done.

Configure Custom Safety Buttons

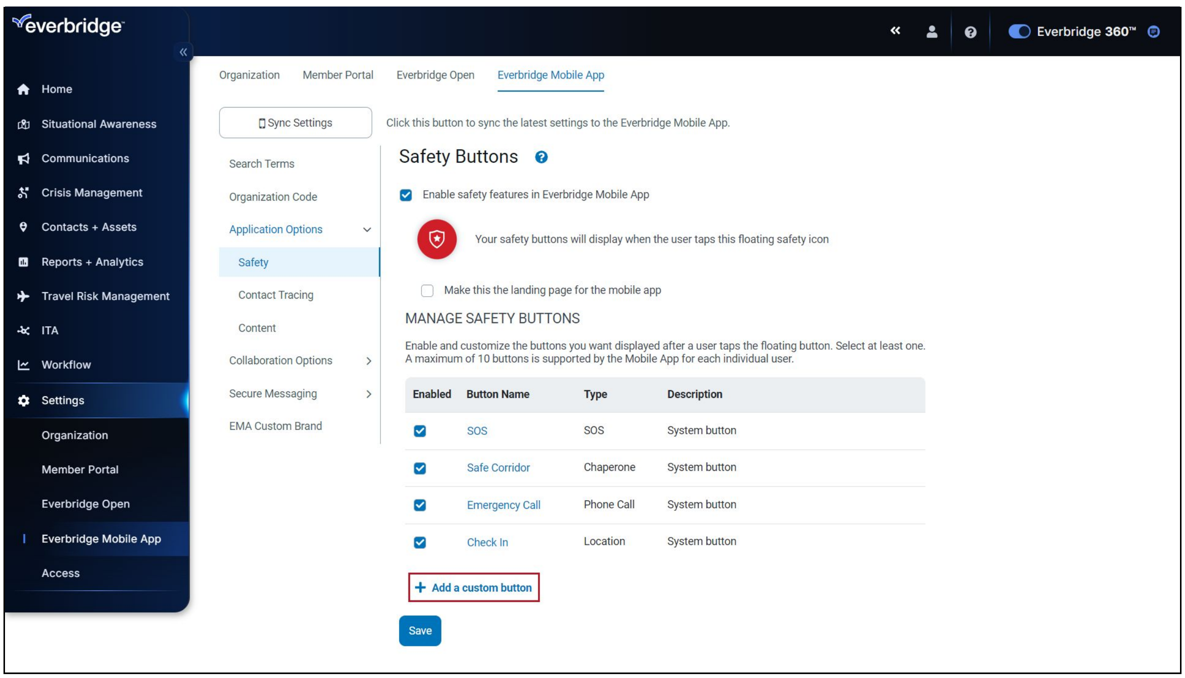
In addition to these four default Safety buttons, custom Safety buttons can be created. To do this:

1. Navigate to **Settings** > **Everbridge Mobile App** > **Application Options** > **Safety** and make sure the **Enable safety feature in Everbridge Mobile App** checkbox is selected.

2. In the Everbridge Mobile App, the Safety Buttons page is available when tapping the floating Safety icon. Optionally, select the Make this the landing page for the mobile app checkbox.

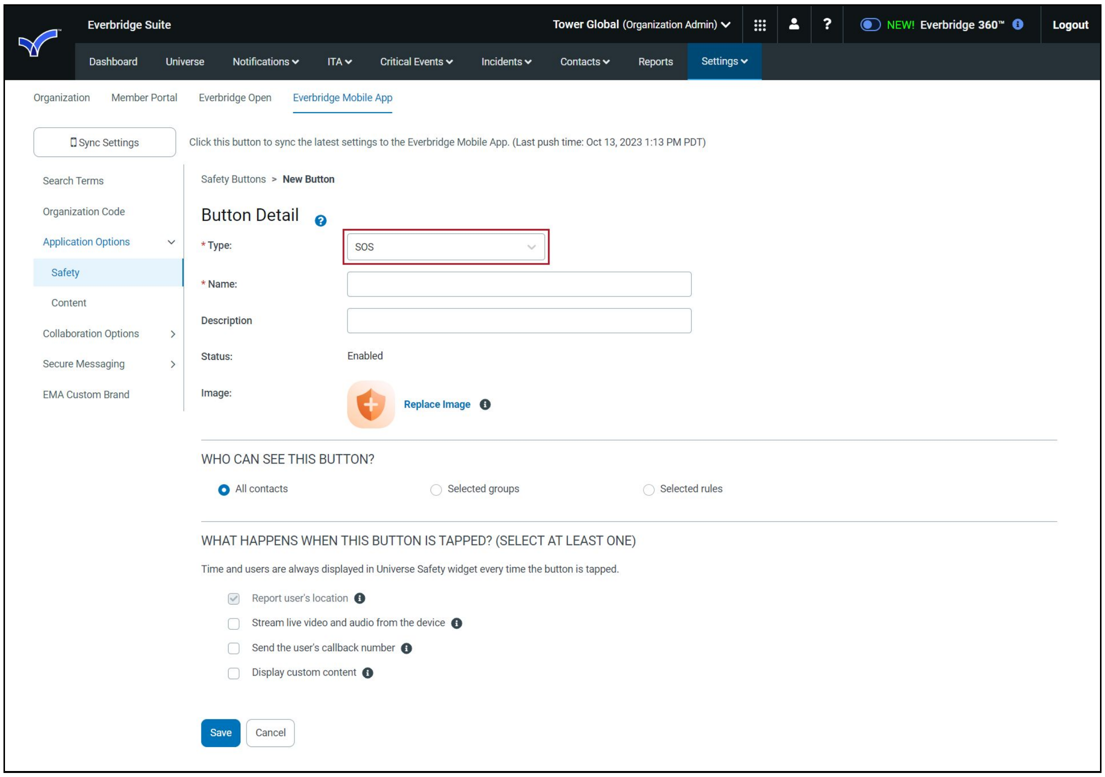
   If this checkbox is clear, Mobile App users will need to click to tap the floating Safety icon to access the Safety buttons page.

   - The mobile app will use the Safety buttons page as the default page when the application starts.
   - After a period of inactivity of 15 minutes in the background, the Mobile App will automatically display that page when the app is in the foreground.
3. Click **Add a custom button**.

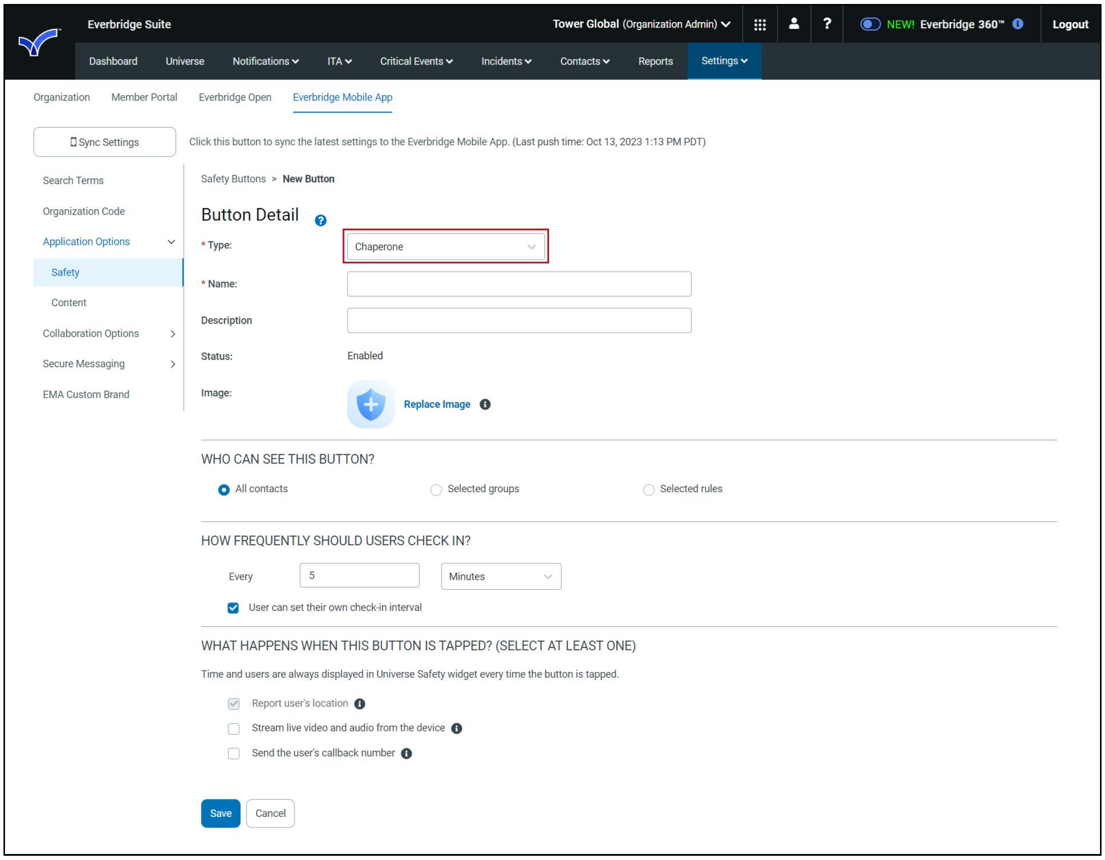


4. The **Button Detail** page appears. Select the button type from the drop-down list.
   - **SOS** - Trigger a SOS action.
   - **Chaperone** - Trigger a Chaperone/Safe Corridor action.
   - **Phone Call** - Trigger a phone call. There are about 240 countries from which to configure, including support phone numbers belonging to those countries.
   - **Location** - Trigger a check-in action.
   - **Content** - When the button is tapped, a Content page is displayed on the mobile device. This action is not visible on the Universe page and cannot trigger a threshold.
   - **Custom Form** - When the button is tapped, a questionnaire is displayed. When submitted, an Incident report is triggered.
   - **Hyperlink** - When the button is tapped, the default web browser opens using the hyperlink value.

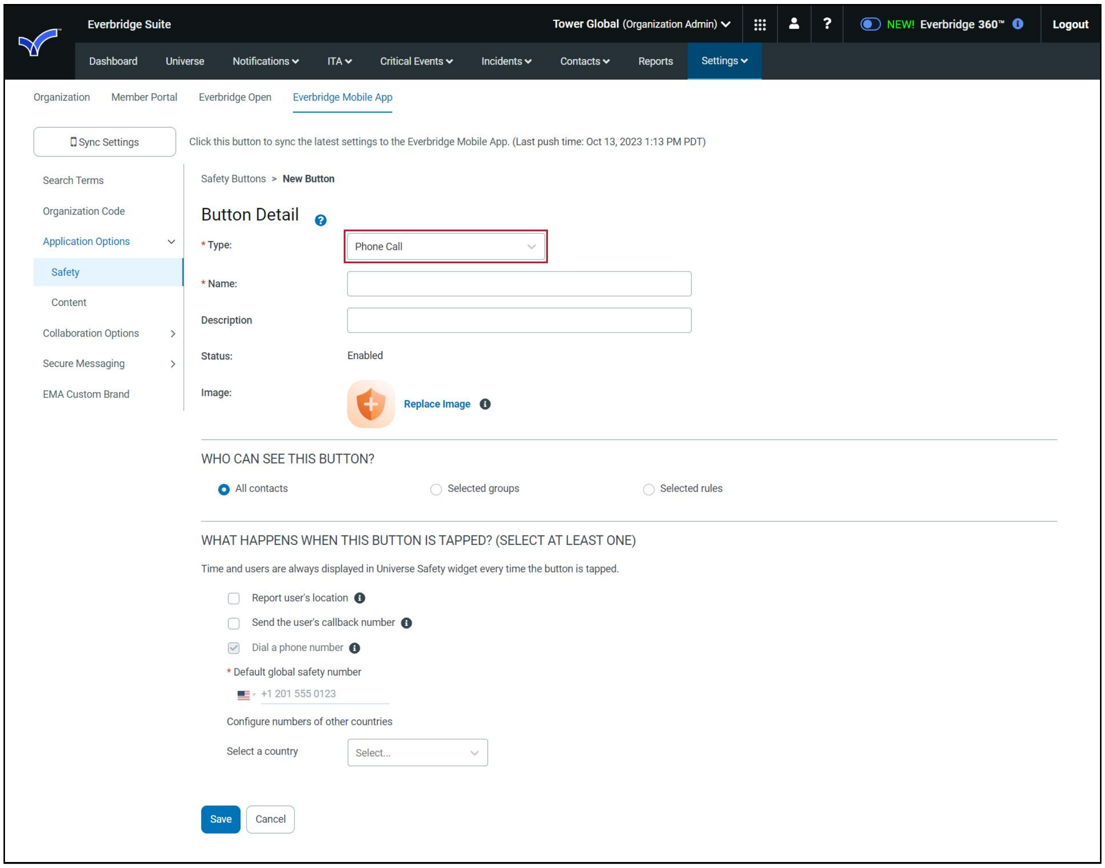
5. See the following example Button Detail pages for each button type.
   - **SOS**



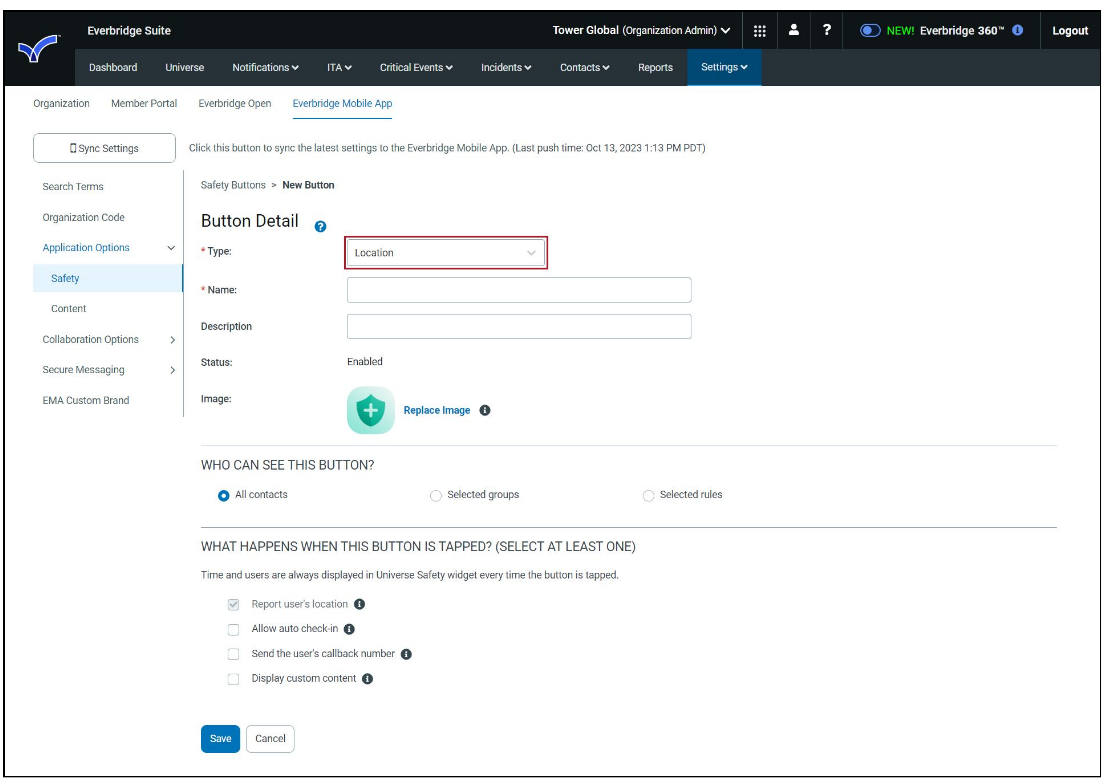
   - **Chaperone**


Everbridge Suite
Tower Global (Organization Admin)
NEW! Everbridge 360™
Logout
Dashboard
Universe
Notifications
ITA
Critical Events
Incidents
Contacts
Reports
Settings
Organization
Member Portal
Everbridge Open
Everbridge Mobile App
Sync Settings
Click this button to sync the latest settings to the Everbridge Mobile App. (Last push time: Oct 13, 2023 1:13 PM PDT)
Search Terms
Organization Code
Application Options
Safety
Content
Collaboration Options
Secure Messaging
EMA Custom Brand
Safety Buttons > New Button
Button Detail
* Type:
Chaperone
* Name:
Description
Status:
Enabled
Image:
Replace Image
WHO CAN SEE THIS BUTTON?
All contacts
Selected groups
Selected rules
HOW FREQUENTLY SHOULD USERS CHECK IN?
Every
5
Minutes
User can set their own check-in interval
WHAT HAPPENS WHEN THIS BUTTON IS TAPPED? (SELECT AT LEAST ONE)
Time and users are always displayed in Universe Safety widget every time the button is tapped.
Report user's location
Stream live video and audio from the device
Send the user's callback number
Save
Cancel

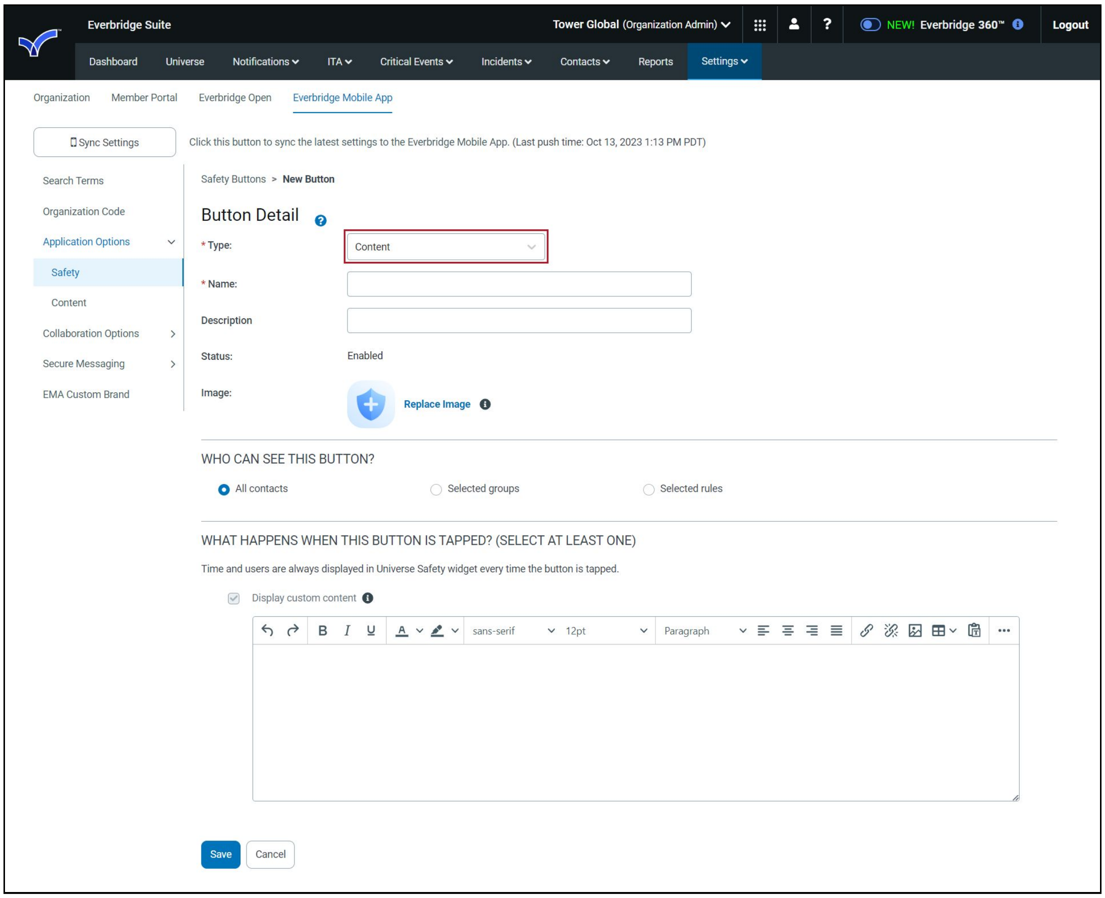
- **Phone Call**


Everbridge Suite
Tower Global (Organization Admin)
NEW! Everbridge 360™
Logout
Dashboard
Universe
Notifications
ITA
Critical Events
Incidents
Contacts
Reports
Settings
Organization
Member Portal
Everbridge Open
Everbridge Mobile App
Sync Settings
Click this button to sync the latest settings to the Everbridge Mobile App. (Last push time: Oct 13, 2023 1:13 PM PDT)
Search Terms
Organization Code
Application Options
Safety
Content
Collaboration Options
Secure Messaging
EMA Custom Brand
Safety Buttons > New Button
Button Detail
* Type:
Phone Call
* Name:
Description
Status:
Enabled
Image:
Replace Image
WHO CAN SEE THIS BUTTON?
All contacts
Selected groups
Selected rules
WHAT HAPPENS WHEN THIS BUTTON IS TAPPED? (SELECT AT LEAST ONE)
Time and users are always displayed in Universe Safety widget every time the button is tapped.
Report user's location
Send the user's callback number
Dial a phone number
* Default global safety number
+1 201 555 0123
Configure numbers of other countries
Select a country
Select...
Save
Cancel

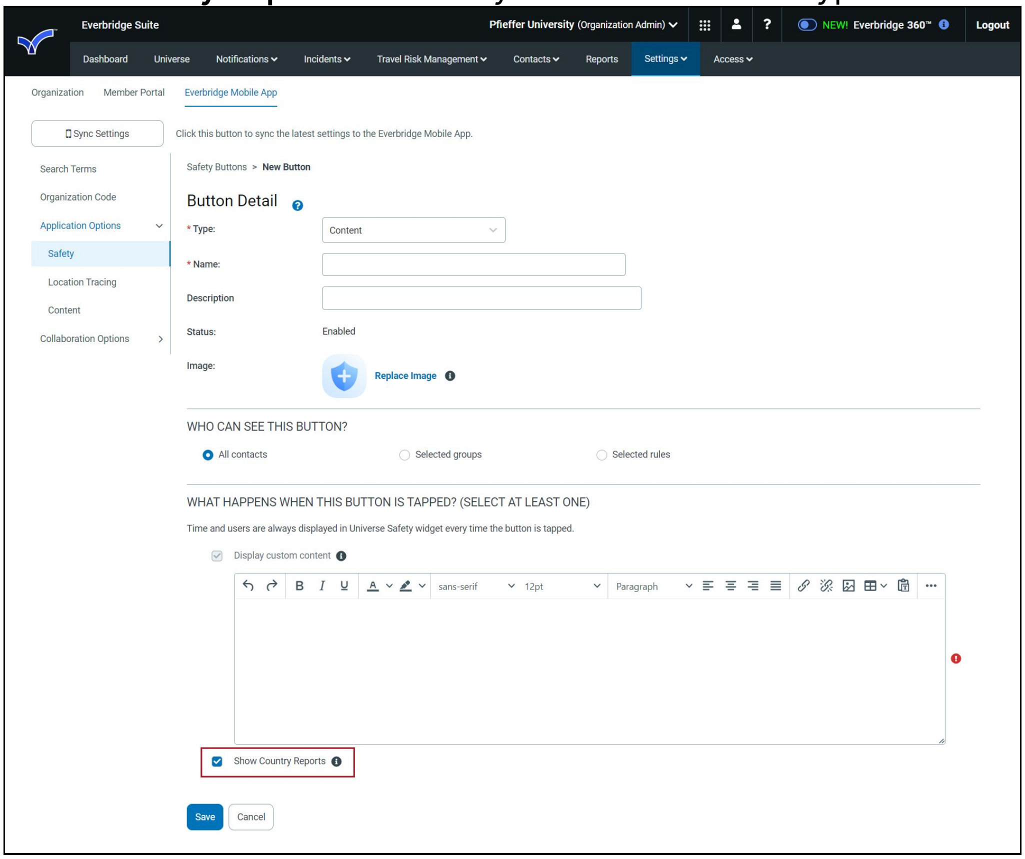
- **Location**


Everbridge Suite
Tower Global (Organization Admin)
NEW! Everbridge 360™
Logout
Dashboard
Universe
Notifications
ITA
Critical Events
Incidents
Contacts
Reports
Settings
Organization
Member Portal
Everbridge Open
Everbridge Mobile App
Sync Settings
Click this button to sync the latest settings to the Everbridge Mobile App. (Last push time: Oct 13, 2023 1:13 PM PDT)
Search Terms
Organization Code
Application Options
Safety
Content
Collaboration Options
Secure Messaging
EMA Custom Brand
Safety Buttons > New Button
Button Detail
* Type:
Location
* Name:
Description
Status:
Enabled
Image:
Replace Image
WHO CAN SEE THIS BUTTON?
All contacts
Selected groups
Selected rules
WHAT HAPPENS WHEN THIS BUTTON IS TAPPED? (SELECT AT LEAST ONE)
Time and users are always displayed in Universe Safety widget every time the button is tapped.
Report user's location
Allow auto check-in
Send the user's callback number
Display custom content
Save
Cancel

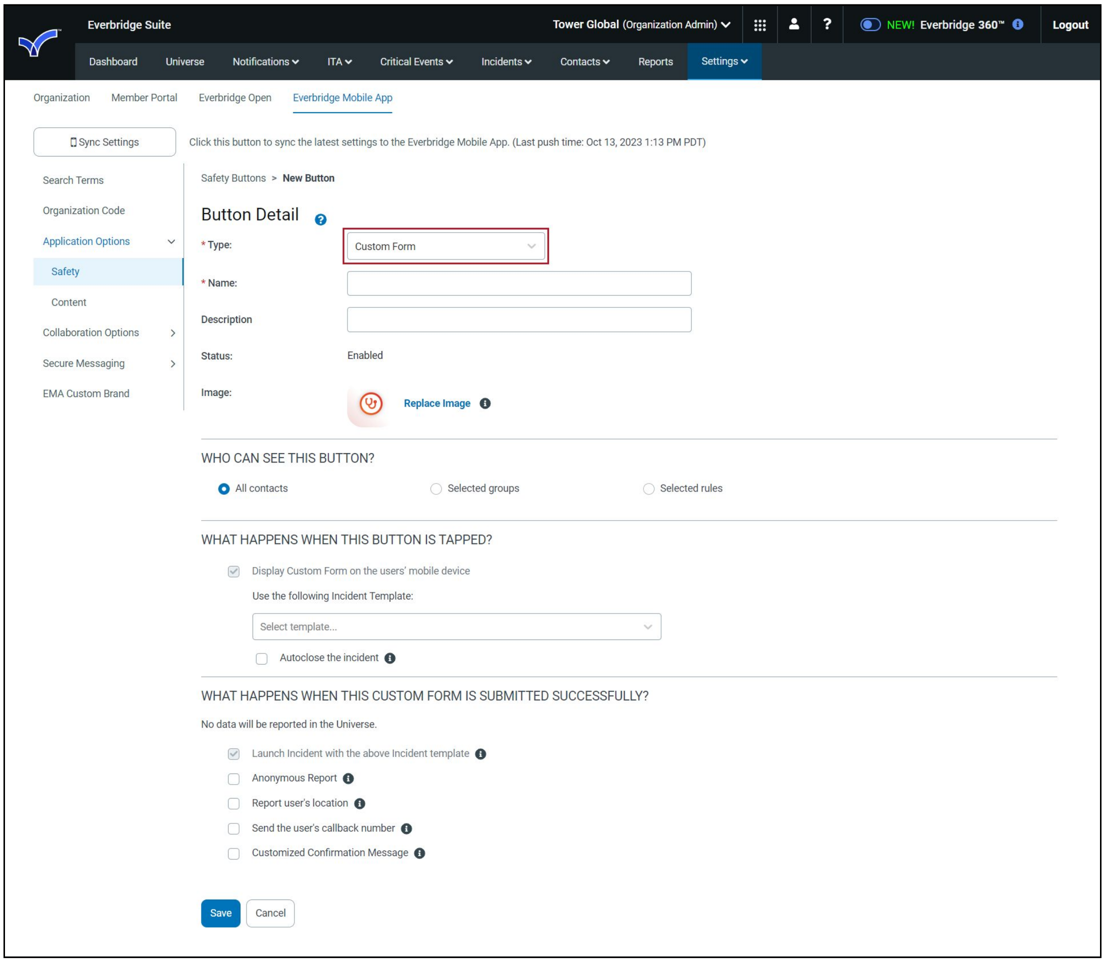
- **Content**


Everbridge Suite
Tower Global (Organization Admin)
NEW! Everbridge 360™
Logout
Dashboard
Universe
Notifications
ITA
Critical Events
Incidents
Contacts
Reports
Settings
Organization
Member Portal
Everbridge Open
Everbridge Mobile App
Sync Settings
Click this button to sync the latest settings to the Everbridge Mobile App. (Last push time: Oct 13, 2023 1:13 PM PDT)
Search Terms
Organization Code
Application Options
Safety
Content
Collaboration Options
Secure Messaging
EMA Custom Brand
Safety Buttons > New Button
Button Detail
* Type:
Content
* Name:
Description
Status:
Enabled
Image:
Replace Image
WHO CAN SEE THIS BUTTON?
All contacts
Selected groups
Selected rules
WHAT HAPPENS WHEN THIS BUTTON IS TAPPED? (SELECT AT LEAST ONE)
Time and users are always displayed in Universe Safety widget every time the button is tapped.
Display custom content
sans-serif
12pt
Paragraph
Save
Cancel

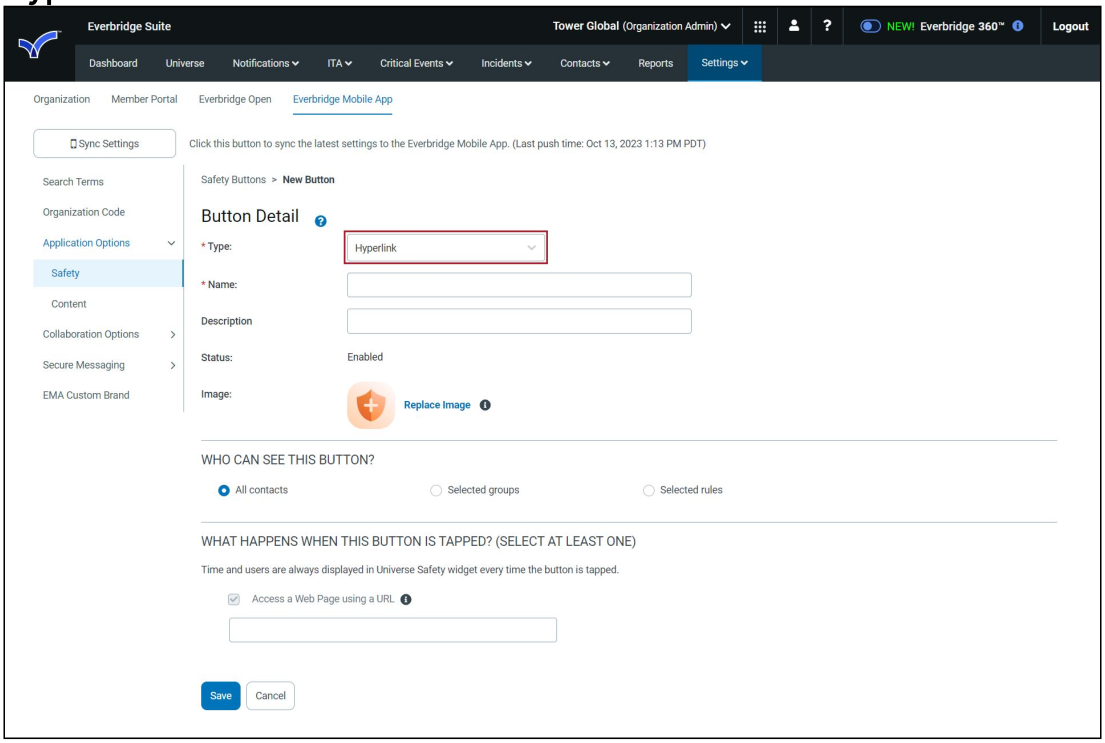
- Travel Protector customers will also see an additional option titled **Show Country Reports** when they select the **Content** type.



- ## Custom Form


Everbridge Suite
Tower Global (Organization Admin)
NEW! Everbridge 360™
Logout
Dashboard
Universe
Notifications
ITA
Critical Events
Incidents
Contacts
Reports
Settings
Organization
Member Portal
Everbridge Open
Everbridge Mobile App
Sync Settings
Click this button to sync the latest settings to the Everbridge Mobile App. (Last push time: Oct 13, 2023 1:13 PM PDT)
Search Terms
Organization Code
Application Options
Safety
Content
Collaboration Options
Secure Messaging
EMA Custom Brand
Safety Buttons > New Button
Button Detail
* Type:
Custom Form
* Name:
Description
Status:
Enabled
Image:
Replace Image
WHO CAN SEE THIS BUTTON?
All contacts
Selected groups
Selected rules
WHAT HAPPENS WHEN THIS BUTTON IS TAPPED?
Display Custom Form on the users' mobile device
Use the following Incident Template:
Select template...
Autoclose the incident
WHAT HAPPENS WHEN THIS CUSTOM FORM IS SUBMITTED SUCCESSFULLY?
No data will be reported in the Universe.
Launch Incident with the above Incident template
Anonymous Report
Report user's location
Send the user's callback number
Customized Confirmation Message
Save
Cancel

- **Hyperlink**



6. Once the type has been selected, enter a name and an optional description.
7. Optionally, click **Replace image** to upload a different image used on the Everbridge Mobile App. The recommended size for images is 256x256 pixels.
8. For any button that has been enabled, the contacts that can view or use the button in the Everbridge Mobile App can be set in the **Who can see this button?** section. There are three mutually exclusive possibilities:
   - **All Contacts** - Any contact who has access to the Everbridge Mobile App will be able to use the button.
   - **Selected groups** - One or more groups of contacts can be selected. At least one group must be selected. Only contacts who belong to the selected group(s) will be able to use the button.
   - **Selected Rules** - One or more rules can be selected. At least one rule must be selected. Only contacts who match the rule(s) definitions will be able to use the button.
9. Adjust the properties on each button. See Button Properties available for each button.
10. Click **Save** when done.

Button Properties

Property	System Buttons	Custom Buttons

Allow auto check-in. When selected, it is enabled and cannot be cleared. Auto check-in will always put into the Safety Settings when using the default Check-In button.	Check-In	Location
Report User's location. The user's location is reported to the server and used: • In the Universe to locate the position of the event (SOS, Safe Corridor) • In the Safety threshold as a criteria **NOTE:** For default buttons, custom Location, custom Chaperone, and custom SOS buttons, this option cannot be cleared.	SOS Safe Corridor Emergency Call Check-In	SOS Chaperone Phone Call Location Self-Report Custom Form
Send the user's callback number. The callback number is a setting of the Everbridge Mobile App that can be manually set by the Mobile App user. If set, this information is brought back to the server when the button is tapped and displayed on the Universe page. NOTE: For default buttons, this option cannot be cleared.	SOS Safe Corridor Emergency Call	SOS Chaperone Phone Call Location Custom Form
Stream live video and audio from the device. If selected, video and audio recording will start when the button is tapped on the mobile device and streamed to the server. The video with audio will be available from the Universe page.	SOS	SOS Chaperone
Dial a phone number. When the button is tapped, a call will be made. A global safety number must be entered. Up to 20 additional numbers can be set on a country-by-country basis. If the device is in a country for which a number has been set, that number will be dialed. If the device is in a country for which no specific number has been set, the global safety number will be used.	Emergency Call	Phone Call
Use the following Incident Template. An Incident template is attached to the custom		Self-Report Custom Form

button. Once tapped, a questionnaire made of the Incident template variables will be displayed to the Everbridge Mobile App users. Once submitted, the Incident will be triggered with the variables filled with the answers to the questionnaire.		
Autoclose the Incident. Automatically close the Incident after the notification goes out. This option is the equivalent of the "CLOSE Incident after successful send" option available on Incidents.		Self-Report Custom Form
Anonymous Report. This option will hide all the information related to the Everbridge Mobile App users using the button. Their information will not be available in the Manager Portal.		Custom Form
How frequently should users check in? The safe corridor Check-in interval can be set in minutes or seconds. This interval is the maximum time allowed for Everbridge Mobile App users to enter the preset code once they have tapped the Safe Corridor button and started the feature on their device. The default value is 5 minutes. Past this time, an alert will be generated.	Safe Corridor	Chaperone
Display custom content. This option enables the display of content in the Everbridge Mobile App when the button is tapped.	Content	SOS Location Content Self-Report Custom Form
Show Country Reports. When selected, this option enables the display of a search page under the custom content in the Everbridge Mobile App when the button is tapped.		Content

Contact Tracing

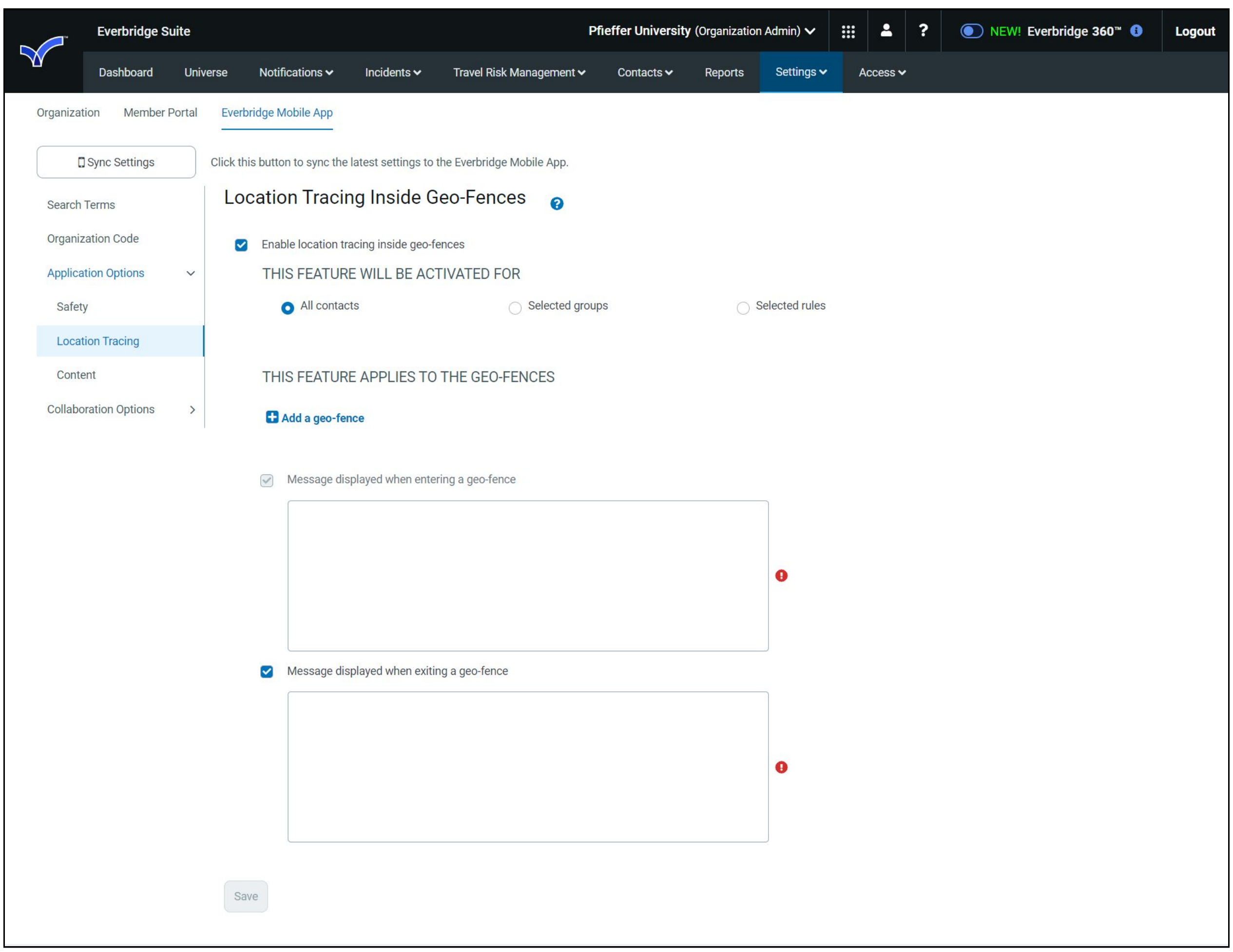
This page enables the activation of proximity-based contact tracing. Select the checkbox of the items you want or enter the required values.

- **Enable Mobile App Bluetooth Proximity Tracing** - This will activate the feature on all devices installed with the Everbridge Mobile App.

- **This feature will be activated for** - Select the radio button corresponding to the contacts you want activated for contact tracing.
- **Enable app to notify mobile users after Exposure Events** - Once a contact has self-reported positive, contacts that are at risk, identified through the proximity tracing feature will be notified. The text of the notification can be entered below the checkbox.
- **Trigger Incident after Exposure Events** - For each contact that is at risk, identified through the proximity tracing feature, an Incident will be triggered using the selected template. Optionally, the Incident can be automatically closed as soon as the notification goes out.

Location Tracing

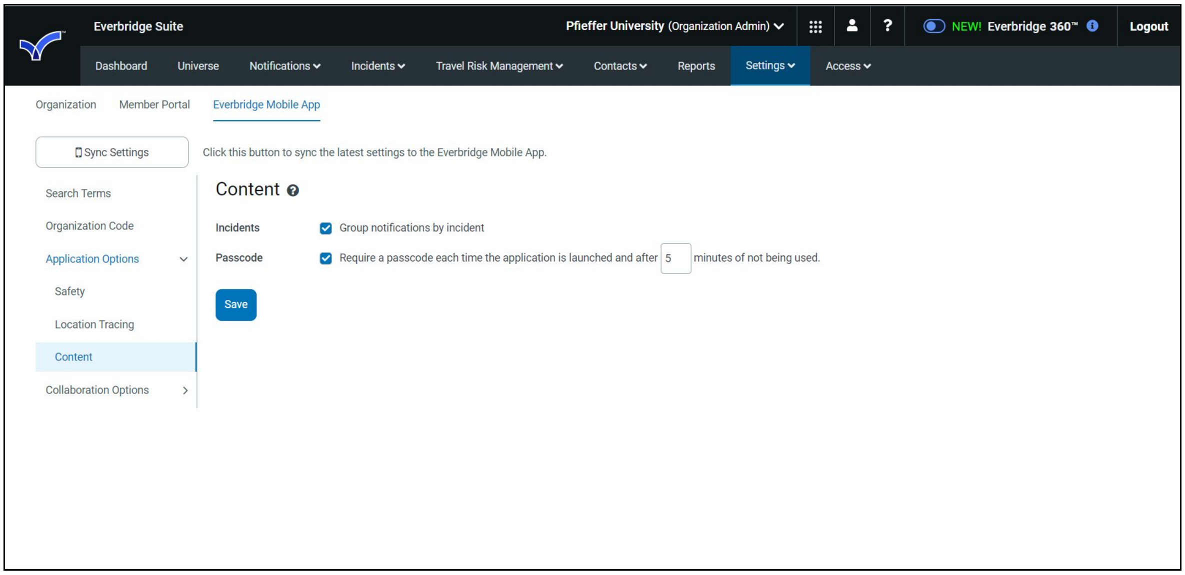
Create geo-fences and automatically get detailed location information when contacts are within these geo-fences. The privacy of the contacts is preserved as their location data is not exposed outside the predefined geo-fence. A push notification is always sent to contacts when they enter such geo-fences.



Content

Select the checkbox of the items you want.

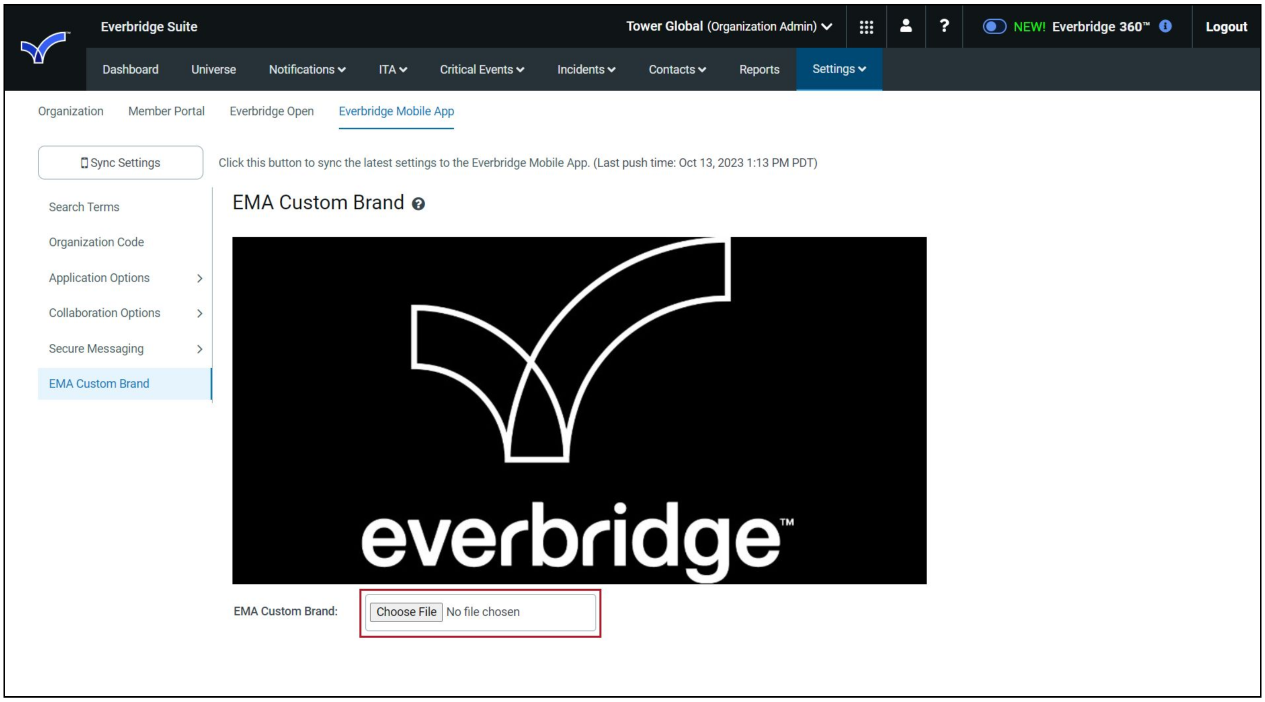
- **Incidents** - Group notifications by Incident
- **Subscriptions** - Allow subscribers to be anonymous
- **Passcode** - Require a passcode each time the application is launched and after a time (in minutes) of not being used. You can change the time from 5 minutes.



EMA Custom Brand

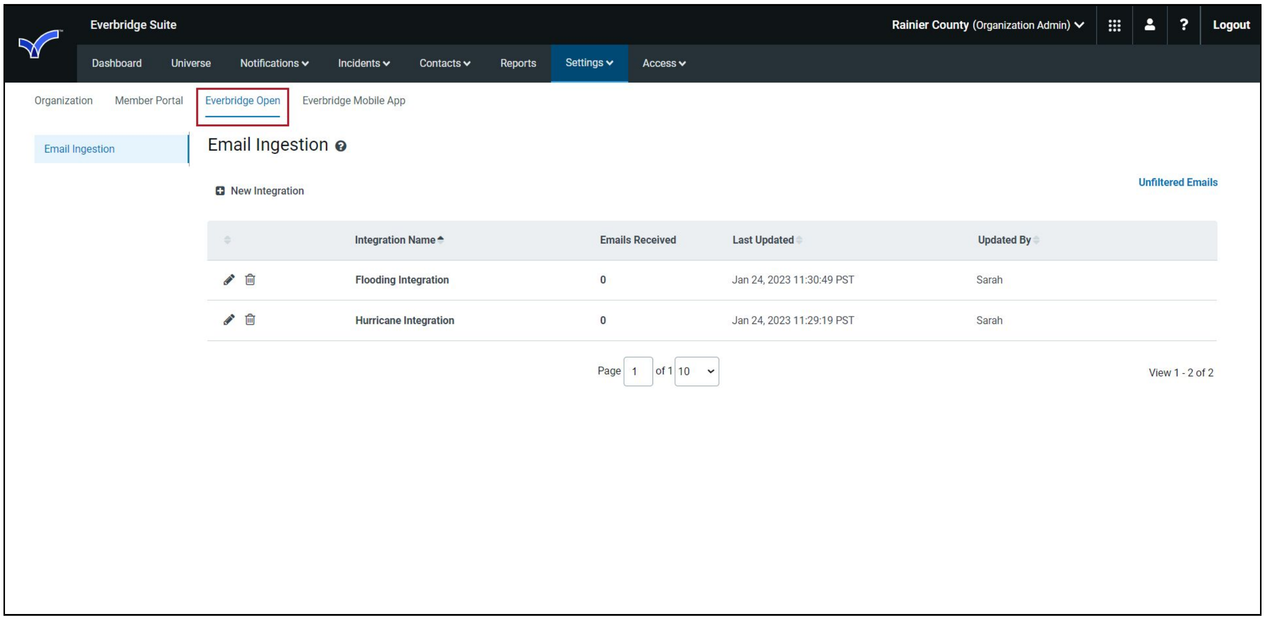
If enabled for your Organization by Support, you can choose a custom Everbridge Mobile App (EMA) banner. The image must be **840 x 420** with a ratio of width to height 2:1.

If you want to change your custom brand, click **Choose File** and select the new image. Click **Save** when you are done.


Everbridge Suite
Tower Global (Organization Admin)
NEW! Everbridge 360™
Logout
Dashboard
Universe
Notifications
ITA
Critical Events
Incidents
Contacts
Reports
Settings
Organization
Member Portal
Everbridge Open
Everbridge Mobile App
Sync Settings
Click this button to sync the latest settings to the Everbridge Mobile App. (Last push time: Oct 13, 2023 1:13 PM PDT)
Search Terms
Organization Code
Application Options
Collaboration Options
Secure Messaging
EMA Custom Brand
EMA Custom Brand
everbridge™
EMA Custom Brand:
Choose File
No file chosen

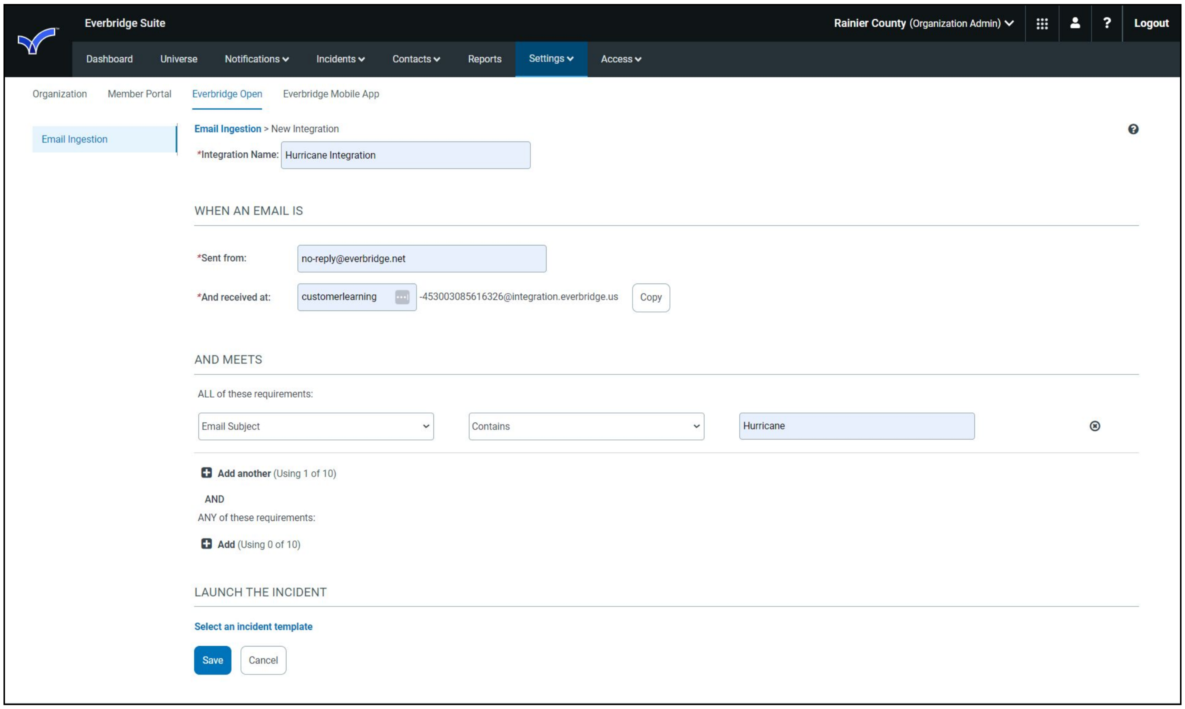
Setting Up an Integration

From the **Settings** tab, select the **Everbridge Open** tab. Then select **Email Ingestion** from the left-hand pane. The Email Ingestion list of existing integrations is displayed.



To add an integration:

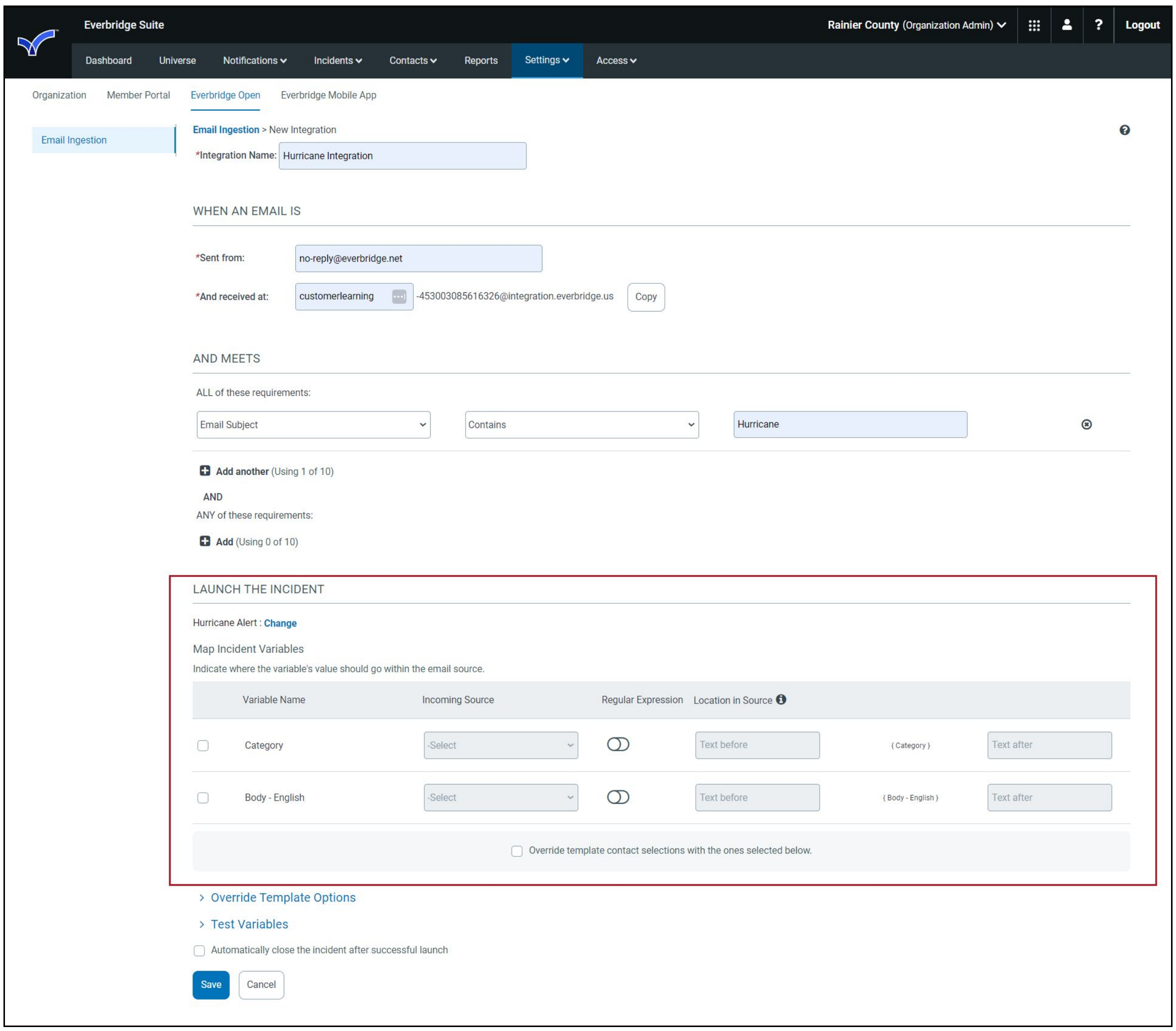
1. From the **Settings** tab, select the **Everbridge Open** tab.
2. From the Everbridge Open tab, select **Email Ingestion**.
3. Click **New Integration**. The New Integration dialog is displayed.



4. Type an Integration Name and press TAB.
5. Fill in the fields for **When an email is…**:
    - **Sent from**: Type a case-sensitive email address from which the email will be sent to Everbridge. You can use the wild card character (*) in the account/username part of the email address. For example, *@everbridge.com, 12223345*@domain.com, or *12234@domain.com. The domain (in this example, “domain.com”, never changes
    - **Received at**: Type the case-sensitive username-880038799094@everbridge.com. (The username can be any custom text. The username and 12-digit number will be different for your Organization.)
    - Click **Copy** to copy this email address to the Clipboard.
6. Define the conditions for the incoming email. You can define only the conditions that meet ALL requirements, or only conditions that meet ANY requirements, or meets both ALL and ANY requirements.
7. Meets ALL of these requirements (using 0-10):
    - From the left-most drop-down list, select Email Subject, Email Body, or Text Attachments.
        - From the center drop-down list, select the condition: Contains, Exactly Matches, Starts With, or Ends With.
        - From the right-most text box, type the value of the condition.
        - Optionally, select the link: Add another to add another requirement.
    - Meets ANY of these requirements (using 0-10):
        - From the left-most drop-down list, select Email Subject, Email Body, or Text Attachments.

- From the center drop-down list, select the condition: Contains, Exactly Matches, Starts With, or Ends With.
- From the right-most text box, type the value of the condition.
- Optionally, select the link: Add another to add another requirement.

8. From **Launch the Incident**..., click **Select an Incident template**. The Select an Incident Template dialog appears. Select the radio button indicating the desired Incident template from the list in the left-hand pane. The selected Incident template is displayed on the right-hand pane.
9. Click **OK**. The selected Incident Template will appear at the bottom of the page under the **Launch Incident** header.



10. As needed, select the following for each desired Incident variable:

    Variables that are required in the Incident template must be mapped. You cannot clear the checkbox. The checkboxes of optional variables can be cleared. You do not have to map optional variables. You can map an optional variable by selecting the checkbox.

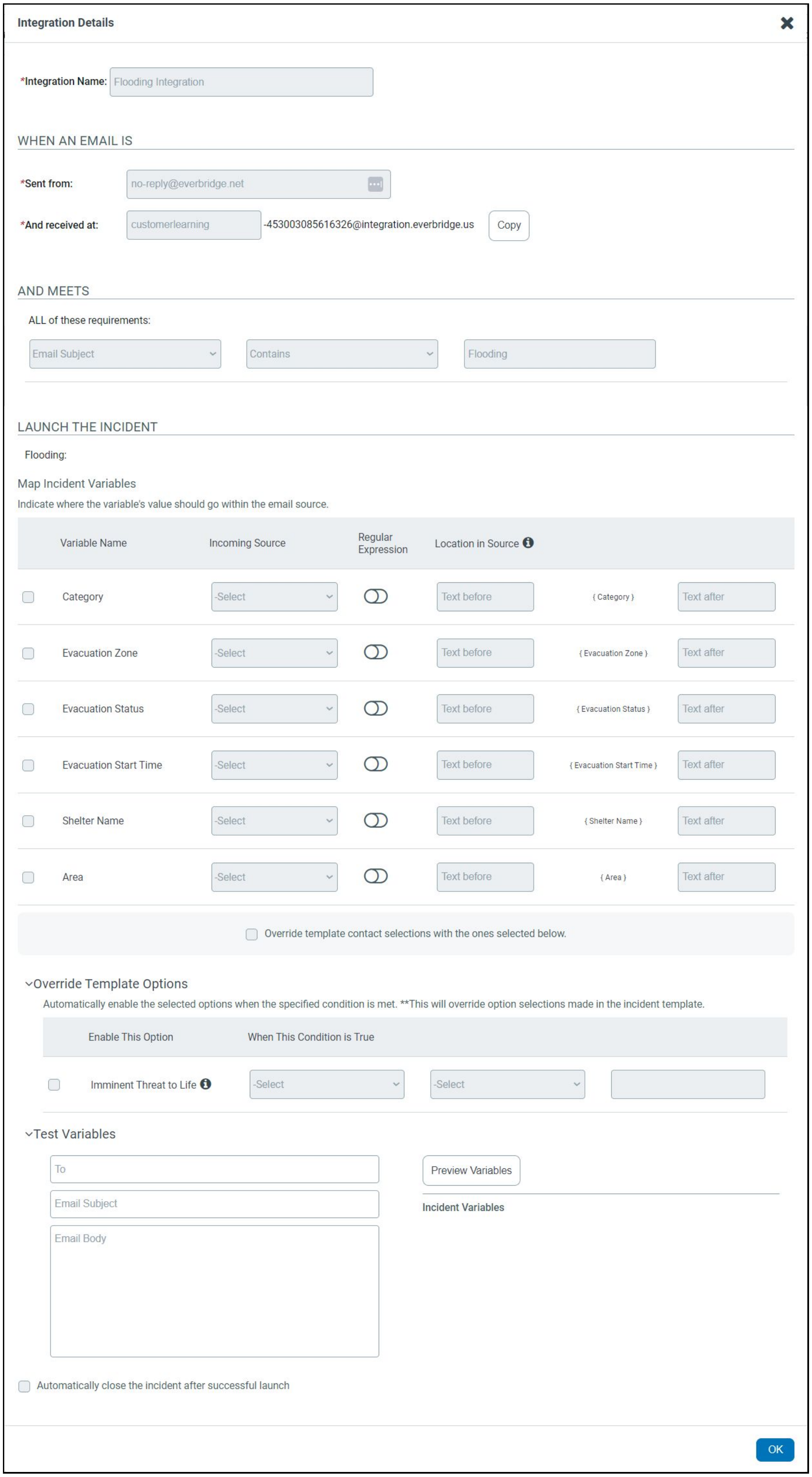
- Select the checkbox if you want to use the variable to the right of the checkbox.
- From the drop-down list, the Incoming Source: Email Subject, Email Body, or Text Attachments.
- If your Incoming Source field is "To" (an email address), check the format of the field and craft your Regular Expressions accordingly to match the desired text section. Alternatively, you can use an exact "contains" match.
- Toggle ON to Use a Regular Expression. Then, in the Location in Source field, enter the regular expression.
- Location in Source (Text before and Text after): Refers to the text that surrounds the variable information in the email. You can use words as well as punctuation to specify the location. The more specific the “before” and “after” text, the easier to pull the variable from the source.
- Optionally, select the checkbox: Override template contact selections with the ones selected below and fill in as needed.
  - When parsing contacts, the External ID is used. In other words, you can parse contacts by providing the External ID in the email.
  - When parsing groups, the Group Name is used. In other words, you can parse groups by providing the Group Name in the email.
  - When parsing rules, the Rule Name is used. In other words, you can parse rules by providing the Rule Name in the email.
- Test Variables: Select the Test Variables link to test your Regular Expressions. See the following **Regular Expression** considerations.
  - A Regular Expression match uses Case Sensitive mode.
  - A Regular Expression match uses MultiLine mode. The match is done within one line so ^ and$ can be used to match the beginning and end of a line rather than the whole input.
  - Regular Expression uses DOTALL mode, which makes dot (.) to match new lines. This allows multiline chunks of text to be grabbed.
  - A Regular Expression match matches the first group if at least one group exists. Otherwise, it matches the whole text. This is done to be able to extract chunks of text.
- Optionally, select the checkbox: **Automatically close the Incident after a successful launch.**

11. Click **Save** when done.

View an Existing Integration

To view an existing integration:

1. From the **Everbridge Open** tab, select **Email Ingestion**.
2. From the table, select the desired integration by clicking its name. (Or, if this integration is triggered as an Incident, click the integration name on the **Incident Details** page.) The Integration Details dialog is displayed.

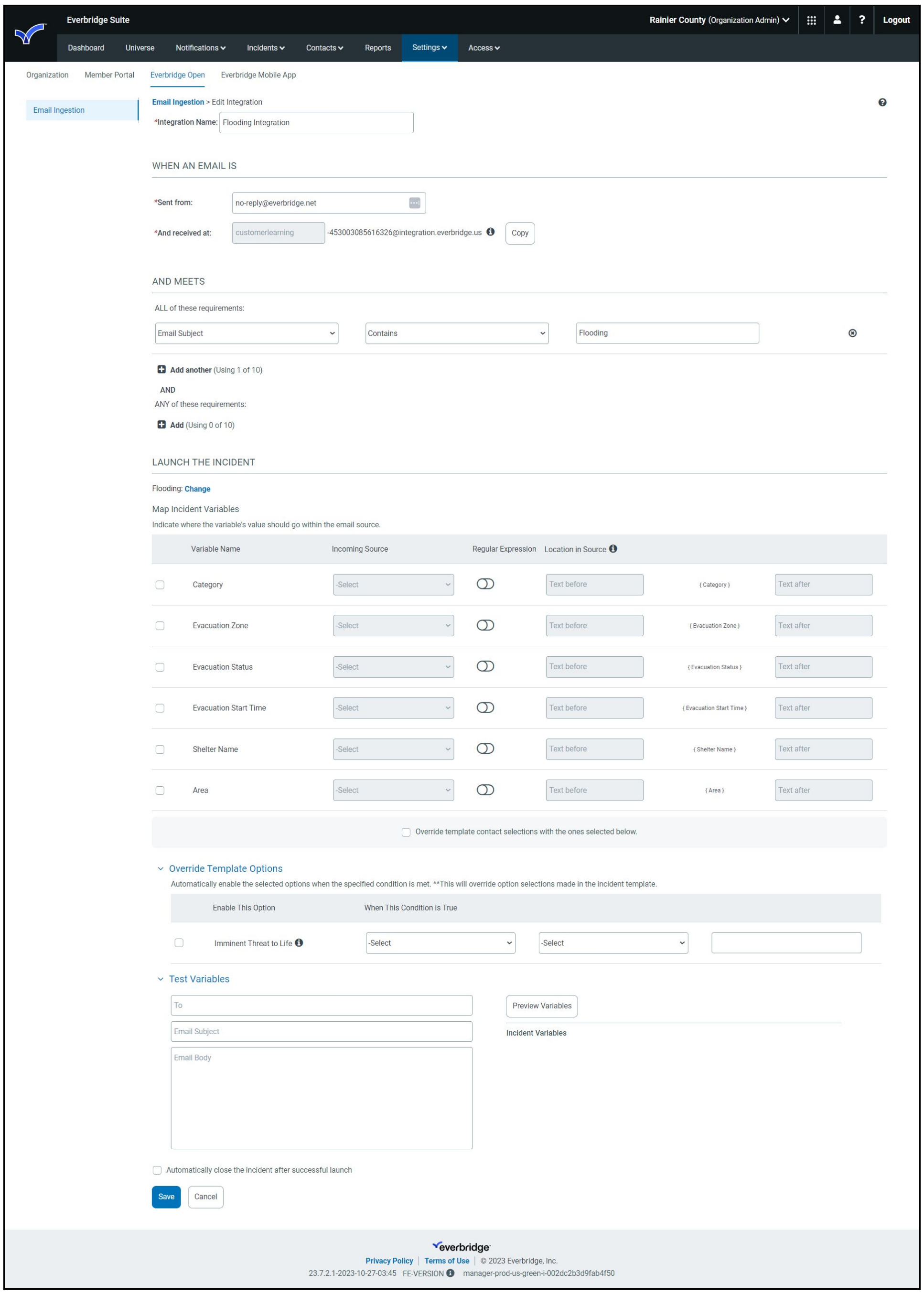

Integration Details
*Integration Name:
Flooding Integration
WHEN AN EMAIL IS
*Sent from:
no-reply@everbridge.net
*And received at:
customerlearning
-453003085616326@integration.everbridge.us
Copy
AND MEETS
ALL of these requirements:
Email Subject
Contains
Flooding
LAUNCH THE INCIDENT
Flooding:
Map Incident Variables
Indicate where the variable's value should go within the email source.
Variable Name
Incoming Source
Regular Expression
Location in Source
Category
Evacuation Zone
Evacuation Status
Evacuation Start Time
Shelter Name
Area
-Select
Text before
Text after
{ Category }
{ Evacuation Zone }
{ Evacuation Status }
{ Evacuation Start Time }
{ Shelter Name }
{ Area }
Override template contact selections with the ones selected below.
Override Template Options
Automatically enable the selected options when the specified condition is met. **This will override option selections made in the incident template.
Enable This Option
When This Condition is True
Imminent Threat to Life
Test Variables
To
Email Subject
Email Body
Preview Variables
Incident Variables
Automatically close the incident after successful launch
OK

3. Review the fields of the selected integration.
4. Click **OK**.

Edit an Existing Integration

To edit an existing integration:

1. From the Everbridge Open tab, select **Email Ingestion**.
2. From the table, select the desired integration by clicking the **Pencil** icon. The Edit Integration dialog is displayed.



3. Optionally, change the Integration Name.
4. As needed, change the fields for **When an email is...:**
    - **Sent from**: Type a case-sensitive email address. You can use the wild card character (*) in the account/username part of the email address. For example, *@domain.com, 12223345*@domain.com, or *12234@domain.com. The domain (in this example, “domain.com”, never changes.
    - And **received a**t: This is a read-only field. To update this field with a different case-sensitive email address, create a new integration.
    - Click **Copy** to copy this email address to the Clipboard.
5. Define the conditions for the incoming email. You can define only the conditions that meet ALL requirements, or only conditions that meet ANY requirements, or meets both ALL and ANY requirements.
    - Meets ALL of these requirements (using 0-10):
        - From the left-most drop-down list, select Email Subject, Email Body, or Text Attachments.
        - From the center drop-down list, select the condition: Contains, Exactly Matches, Starts With, or Ends With.
        - From the right-most text box, type the value of the condition.
        - Optionally, select the link: Add another to add another requirement.
    - Meets ANY of these requirements (using 0-10):
        - From the left-most drop-down list, select Email Subject, Email Body, or Text Attachments.
        - From the center drop-down list, select the condition: Contains, Exactly Matches, Starts With, or Ends With.
        - From the right-most text box, type the value of the condition.
        - Optionally, select the link: Add another to add another requirement.
6. From **Launch the Incident...**, click **Select an Incident template**. The Select an Incident Template dialog appears.
7. Select the radio button indicating the desired Incident template from the list in the left-hand pane. The selected Incident template is displayed on the right-hand pane.
8. Click **OK**.
9. As needed, select the following for each desired Incident variable:
    - Select the checkbox if you want to use the variable to the right of the checkbox.
    - From the drop-down list, the Incoming Source: Email Subject, Email Body, or Text Attachments.
    - If your Incoming Source field is "To" (an email address), check the format of the field and craft your Regular Expressions accordingly to match the desired text section. Alternatively, you can use an exact "contains" match.

- Toggle ON to Use a Regular Expression. Then, in the Location in Source field, enter the regular expression.
- Location in Source (Text before and Text after): Refers to the text that surrounds the variable information in the email. You can use words as well as punctuation to specify the location. The more specific the "before" and "after" text, the easier to pull the variable from the source.
- Optionally, select the checkbox: Override template contact selections with the ones selected below and fill in as needed.

10. Test Variables: Select the Test Variables link to test your Regular Expressions. See the following **Regular Expression** considerations.
    - A Regular Expression match uses Case Sensitive mode.
    - A Regular Expression match uses MultiLine mode. The match is done within one line so ^ and$ can be used to match the beginning and end of a line rather than the whole input.
    - Regular Expression uses DOTALL mode, which makes dot (.) to match new lines. This allows MultiLine chunks of text to be grabbed.

    > **NOTE:** A Regular Expression match matches the first group if at least one group exists. Otherwise, it matches the whole text. This is done to be able to extract chunks of text.

11. Optionally, select the checkbox: Automatically close the Incident after a successful launch.
12. Click **Save**.

Delete an Integration

To delete an integration:

1. From the list of integrations, click the **Trash Can** icon for the integration to be deleted.
2. Click **Yes** to confirm the deletion.

Setting Up Response Subscription Profiles

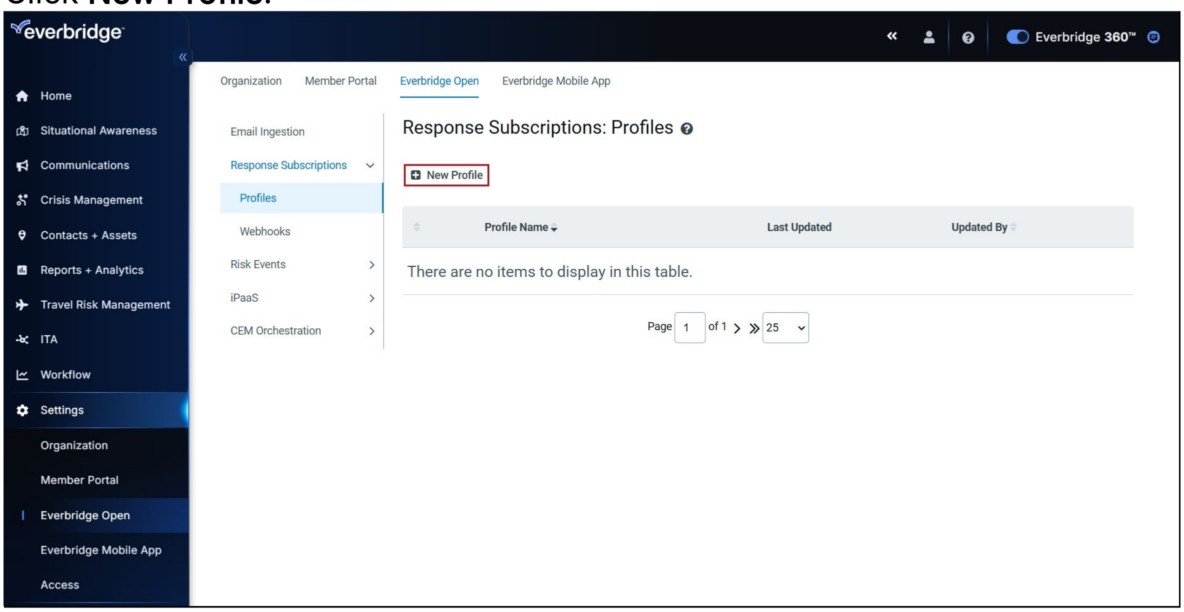
From the **Settings** tab, select the **Everbridge Open** tab. Then select **Profiles** from the left-hand pane. The list of **Response Subscriptions: Profiles** is displayed.

Each profile must include at least one webhook.

Add a Response Subscription: Profile

To add a Response Subscription: Profile:

1. Navigate to **Settings** > **Everbridge Open** > **Response Subscriptions: Profiles**.
2. Click **New Profile**.



3. The **Response Subscriptions: Create/Edit Profile** dialog is displayed. Type a profile name.
   - If they exist, a list of available webhooks is displayed.
   - Click **Add** if you have not yet created any webhooks.
4. Select the check boxes of the webhooks you want used in this profile.
5. Click **Save**.

Edit a Response Subscription: Profile

To edit a Response Subscription: Profile

1. From the **Settings** tab, select the **Everbridge Open** tab.
2. From the Everbridge Open tab, select **Response Subscriptions: Profiles**.
3. Click the Pencil icon next to the Profile you want to modify.
4. Perform the steps in the previous procedure.

Delete a Response Subscription: Profile

To delete a Response Subscription: Profile

1. From the **Settings** tab, select the **Everbridge Open** tab.
2. From the **Everbridge Open** tab, select **Response Subscriptions: Profiles**.
3. Click the Trash Bin of the profile you want to delete.
4. Confirm the deletion.

Add a Response Subscription: Webhook

To add a Response Subscription: Webhook

1. From the **Settings** tab, select the **Everbridge Open** tab.
2. From the **Everbridge Open** tab, select **Response Subscriptions: Webhooks**. The list of webhooks is displayed.
   - Each webhook displays its webhook name, URL, username, and password (secured).
3. Click **New Webhook**. The **Create/Edit Webhook** dialog is displayed.
4. Type a name for your webhook and press TAB.
5. Type a Callback URL for the webhook and press TAB.
6. Select either of the **Callback Format** radio buttons:
   - **JSON**
   - **XML**.
     - Everbridge can send the responses to the webhook in either JSON or XML format.
7. Optionally, type a Username and Password for the webhook.
8. Click **OK**. Each webhook that you create becomes available for use in the Profiles.

Edit a Response Subscription: Webhook

To edit a Response Subscription: Webhook

1. From the **Settings** tab, select the **Everbridge Open** tab.
2. From the **Everbridge Open** tab, select **Response Subscriptions: Webhooks**.
3. Click the Pencil icon next to the webhook you want to modify.
4. Perform steps 3-8 of the procedure Add a Response Subscription: Webhook.

Delete a Response Subscription: Webhook

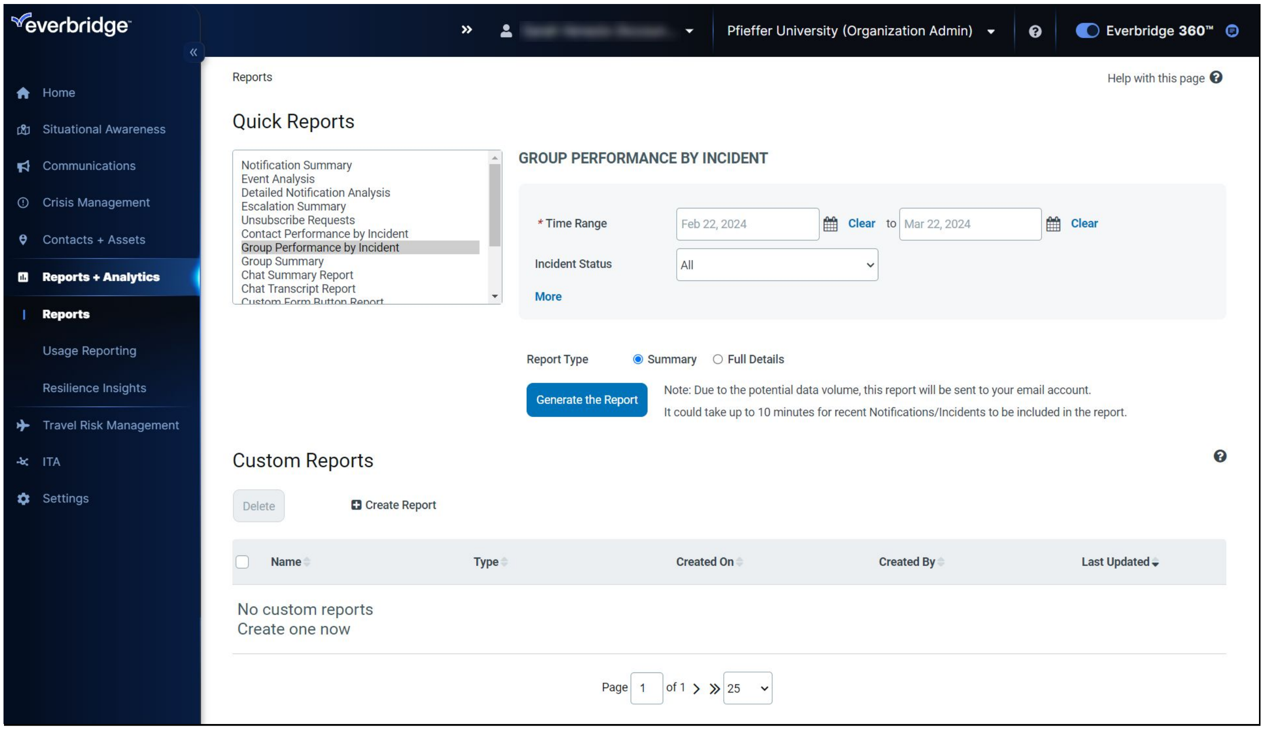
To delete a Response Subscription: Webhook

1. From the **Settings** tab, select the **Everbridge Open** tab.
2. From the **Everbridge Open** tab, select **Response Subscriptions: Webhooks**.
3. Click the Trash Bin of the webhook you want to delete.
4. Confirm the deletion.

Quick Reports Overview

Quick Reports can be generated from the **Reports** section within Everbridge Suite and provide a wealth of information at the click of a button.

Select the Quick Report that you'd like to run from the drop-down menu to the left. If applicable, fill in any generated fields to the right once you've made your selection.



Some quick reports will offer a preview of the report, while others will have you choose between a **Summary Report** or a **Full Detail Report**.

When you're done, select **Generate the Report**.

Quick Report Options

You can learn more about each available Quick Report in the table below.

Report Name	Report Contents	Notes
Notification Summary	Shows you the county and type of Notifications sent for a given period of time (up to three months).	Notifications Only

Event Analysis	Shows the summary of information across the Notifications that are part of an **Event**.	Notifications Only
Detailed Notification Analysis	Select dates and a report or credit usage for the time selected, which will be emailed to you.	
Escalation Summary	When you select a Notification that used contact escalation, it provides all levels of that communication in a single view (similar to Event Analysis).	Notifications Only
Unsubscribe Requests	Will email you a report of all delivery method values that have unsubscribed, including the date they occurred.	Will still send you an email if empty.
Contact Performance by Incident	An emailed report for a specified period of time that provides a summary of how many Incidents each **Contact** has received, along with counts of their responses and the average time to respond. The detailed report will list each of the messages you see summarized.	
Contact Tracing Application Report	Gives a report of all Contacts and shows if they have the Everbridge App and the Contact Tracing App.	
Contact Tracing Report	Shows a daily count in one line of how many people have self-reported and in another line the	

	count of exposure events.	
Group Performance by Incident	An emailed report for a specified period of time that details how many Incidents each **Group** has received, along with counts of their responses and the average time to respond. The detailed report will list each of the messages you see summarized.	
Group Summary	Exports a list of **Groups** and associated calendars. It also includes a count of how many contacts are in each group.	
Chat Summary Report	Contains one chart showing the number of active contacts (who have chatted within the last month) versus inactive contacts. A second chart shows the number of chat messages over the last 6 months.	
Custom Form Button Report	Provides a daily count of how many times a button was pushed.	
Mobile Users Not Reporting Location	Lets you filter by timeframe (from **one hour** up to **six months**) and you are emailed a report that lists all Contacts with the Everbridge Mobile App enabled. There is a column for 'Last Reported' that indicates when that Contact stopped reporting a location.	

SOS Summary		
Location/Check-in Summary	Lets you filter by name and or timeframe (from **one hour** up to **six months**) and you are emailed a report of that person's check-ins. Includes Member Name, Record Type, Time, Latitude, and Longitude.	
Addresses Outside Geo-Fence	Displays a chart of the Contacts that have a geocoded latitude/ longitude outside of the configured Geo-fence shape file. The chart will only display if the entire Organization's contact count is below 30,000.	Will send you an email even if empty. This can be useful for anyone that wants to analyze data outside of a given area. Most often used in reviewing older SLG accounts.
Nixle Event Subscribers	Shows an extended version of the Dashboard widget, displaying the opt-in totals per day.	

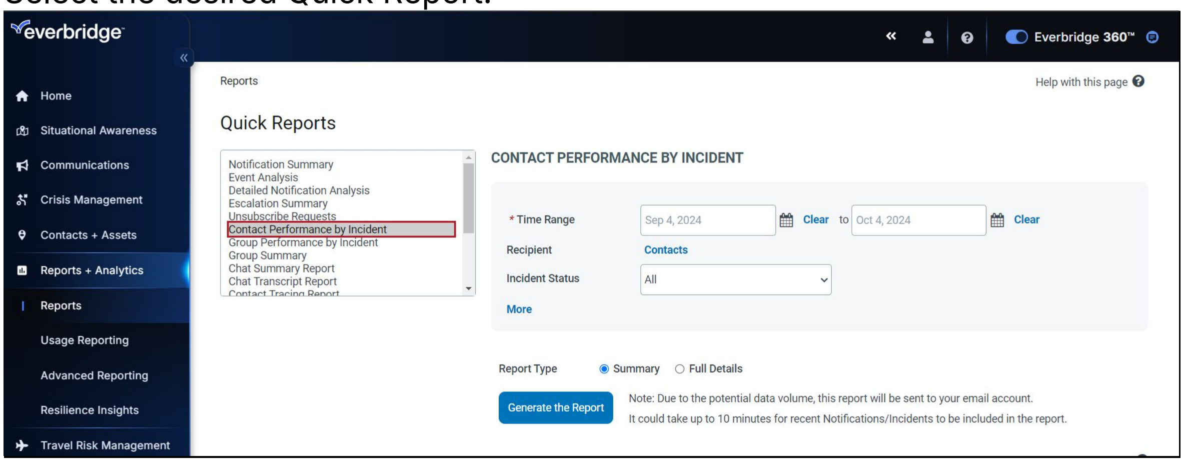
Incident Quick Reports

Quick reports are preconfigured and provide summary information with a few mouse clicks. There are five levels of report types for Incidents:

- **Contacts** - provides information about the contacts.
- **Incident Notifications** - provides the attempt levels and paths contacted.
- **Incidents** - provides information about the Incident.
- **Incident Scenario Notifications** - provides the attempt levels and paths contacted.
- **Incident Scenario** - provides information about the scenario.

You can select the quick report you want to use.

1. Select **Reports+Analytics** > **Quick Reports.**
2. Select the desired Quick Report.



3. Select **View Report**.
4. Depending on the report you are viewing, you can filter on the information displayed in the report.

Contact Quick Reports

You can create and generate Quick Reports and Custom Reports for Contacts from the **Reports** tab.

The following quick reports are discussed:

- Contact Performance by Incident
- Group Performance by Incident
-

Contact Performance by Incident

You can view Contact Notification response history for Incident Notifications. The minimum fields are:

- **Time Range**: Less than 31 days
- **Recipient**: Contact Names
- **Incident Status**: All, Open, or Closed

Choose a report style: summary or full details.

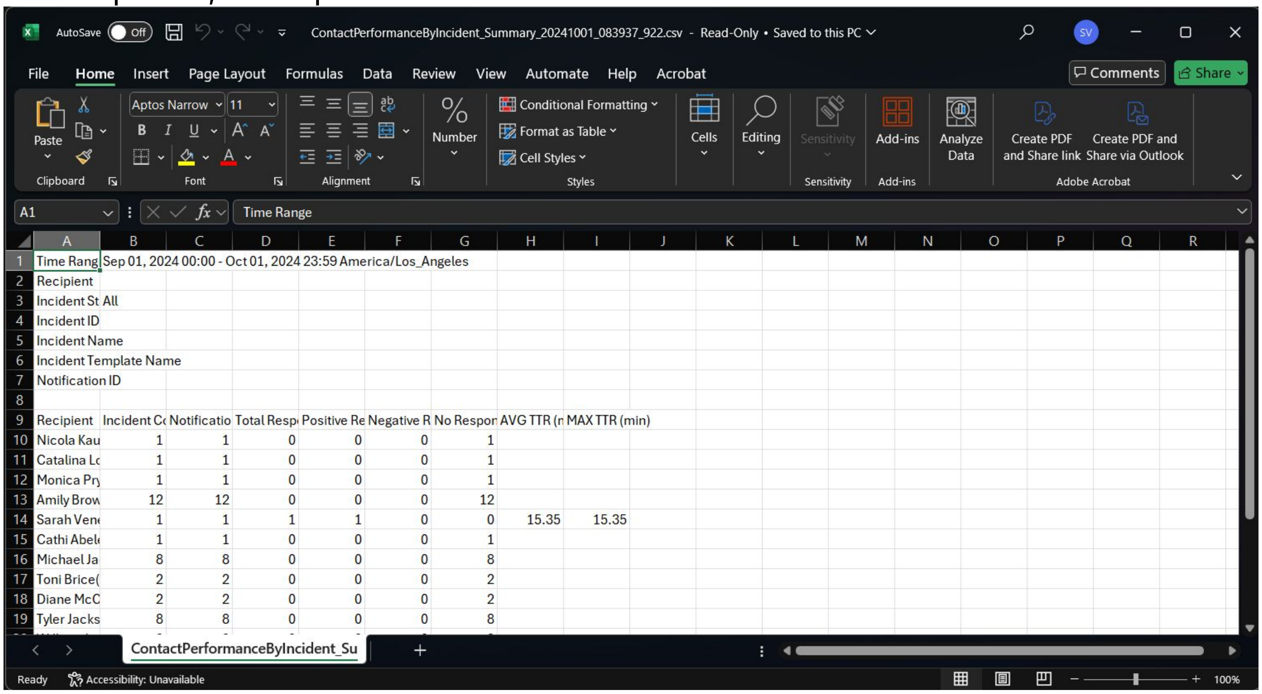
Select **More** to provide more details, as needed.

- The following fields can have up to 50 items:
  - Recipient
  - Incident ID
  - Name
  - Incident Template name
  - Notification ID
- Separate multiple input by a comma.
- The Search condition for Incident Name and Incident Template name is **Equal to** and case-insensitive.

Then select **Generate the Report**.

Contact Performance by Incident - Summary

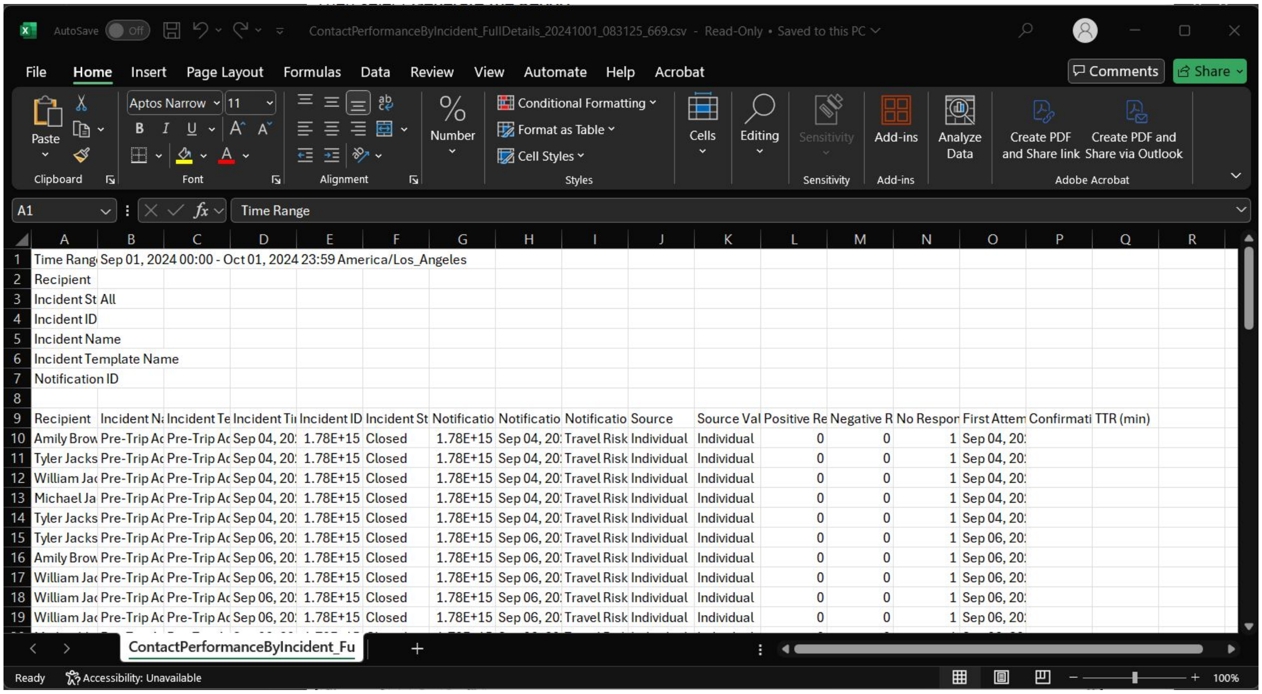
The report is sent to your email account. Click the link to download the ZIP folder. Once opened, the report will look similar to the one below:



	A	B	C	D	E	F	G	H	I
1	Time Rang	Sep 01, 2024 00:00 - Oct 01, 2024 23:59 America/Los_Angeles							
2	Recipient								
3	Incident St	All							
4	Incident ID								
5	Incident Name								
6	Incident Template Name								
7	Notification ID								
8									
9	Recipient	Incident C	Notificatio	Total Resp	Positive Re	Negative R	No Respor	AVG TTR (n	MAX TTR (min)
10	Nicola Kau	1	1	0	0	0	1		
11	Catalina Lc	1	1	0	0	0	1		
12	Monica Pr	1	1	0	0	0	1		
13	Amily Brow	12	12	0	0	0	12		
14	Sarah Ven	1	1	1	1	0	0	15.35	15.35
15	Cathi Abel	1	1	0	0	0	1		
16	Michael Ja	8	8	0	0	0	8		
17	Toni Brice(	2	2	0	0	0	2		
18	Diane McC	2	2	0	0	0	2		
19	Tyler Jacks	8	8	0	0	0	8		

Contact Performance by Incident - Full Details

The report is sent to your email account. Click the link to download the ZIP folder. Once opened, the report will look similar to the one below:



Group Performance by Incident

You can view the Notification response history for a group for Incident Notifications. The minimum fields are:

- **Time Range**: Less than 31 days
- **Incident Status**: All, Open, or Closed.

Choose a report style: summary or full details.

Select **More** to provide more details, as needed.

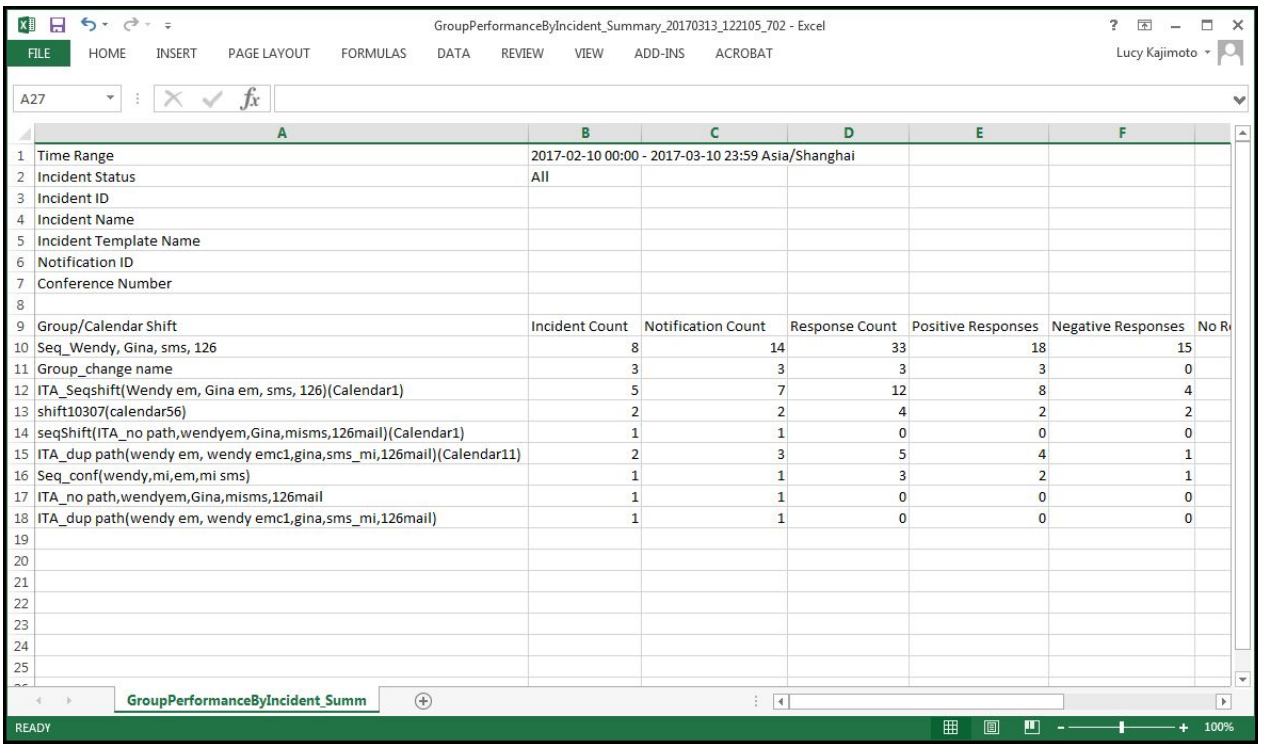
- The following fields can have up to 50 items
  - Recipient
  - Incident ID
  - Name
  - Incident Template name
  - Notification ID
  - Conference Number
- Separate multiple input by a comma.
- The Search condition for Incident Name and Incident Template name is **Equal to** and case-insensitive.

Then select **Generate the Report**.

On downloading any CSV-formatted file, Everbridge Suite screens the data before downloading to your local system. If there is any suspicious content, such as strings that start with = + - @ " (except when - and + are followed by a number), then the CSV-formatted file will be downloaded as a TXT file type during the download.

Group Performance by Incident - Summary—The report is sent to your email account.

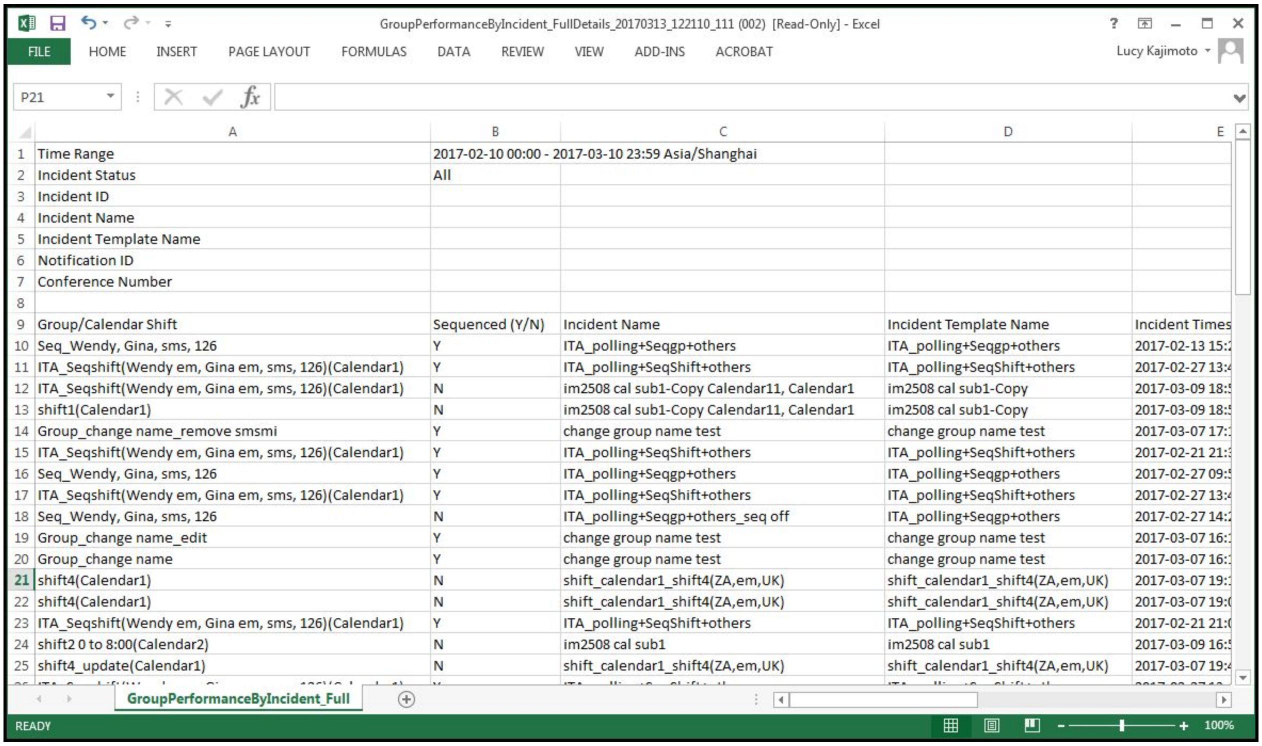
Click the link to download the zip folder. Open the zip folder and open the report. It looks similar to the following report:



	A	B	C	D	E	F
1	Time Range	2017-02-10 00:00 - 2017-03-10 23:59 Asia/Shanghai				
2	Incident Status	All				
3	Incident ID					
4	Incident Name					
5	Incident Template Name					
6	Notification ID					
7	Conference Number					
8						
9	Group/Calendar Shift	Incident Count	Notification Count	Response Count	Positive Responses	Negative Responses
10	Seq_Wendy, Gina, sms, 126	8	14	33	18	15
11	Group_change name	3	3	3	3	0
12	ITA_Seqshift(Wendy em, Gina em, sms, 126)(Calendar1)	5	7	12	8	4
13	shift10307(calendar56)	2	2	4	2	2
14	seqShift(ITA_no path,wendyem,Gina,misms,126mail)(Calendar1)	1	1	0	0	0
15	ITA_dup path(wendy em, wendy emc1,gina,sms_mi,126mail)(Calendar11)	2	3	5	4	1
16	Seq_conf(wendy,mi,em,mi sms)	1	1	3	2	1
17	ITA_no path,wendyem,Gina,misms,126mail	1	1	0	0	0
18	ITA_dup path(wendy em, wendy emc1,gina,sms_mi,126mail)	1	1	0	0	0

Group Performance by Incident - Full Details—The report is sent to your email account.

Click the link to download the zip folder. Open the zip folder and open the report. It looks similar to the following report:



GroupPerformanceByIncident_FullDetails_20170313_122110_111 (002) [Read-Only] - Excel

	A	B	C	D	E
1	Time Range	2017-02-10 00:00 - 2017-03-10 23:59 Asia/Shanghai			
2	Incident Status	All			
3	Incident ID				
4	Incident Name				
5	Incident Template Name				
6	Notification ID				
7	Conference Number				
8					
9	Group/Calendar Shift	Sequenced (Y/N)	Incident Name	Incident Template Name	Incident Times
10	Seq_Wendy, Gina, sms, 126	Y	ITA_polling+Seqgp+others	ITA_polling+Seqgp+others	2017-02-13 15:
11	ITA_Seqshift(Wendy em, Gina em, sms, 126)(Calendar1)	Y	ITA_polling+SeqShift+others	ITA_polling+SeqShift+others	2017-02-27 13:
12	ITA_Seqshift(Wendy em, Gina em, sms, 126)(Calendar1)	N	im2508 cal sub1-Copy Calendar11, Calendar1	im2508 cal sub1-Copy	2017-03-09 18:
13	shift1(Calendar1)	N	im2508 cal sub1-Copy Calendar11, Calendar1	im2508 cal sub1-Copy	2017-03-09 18:
14	Group_change name_remove smsmi	Y	change group name test	change group name test	2017-03-07 17:
15	ITA_Seqshift(Wendy em, Gina em, sms, 126)(Calendar1)	Y	ITA_polling+SeqShift+others	ITA_polling+SeqShift+others	2017-02-21 21:
16	Seq_Wendy, Gina, sms, 126	Y	ITA_polling+Seqgp+others	ITA_polling+Seqgp+others	2017-02-27 09:
17	ITA_Seqshift(Wendy em, Gina em, sms, 126)(Calendar1)	Y	ITA_polling+SeqShift+others	ITA_polling+SeqShift+others	2017-02-27 13:
18	Seq_Wendy, Gina, sms, 126	N	ITA_polling+Seqgp+others_seq off	ITA_polling+Seqgp+others	2017-02-27 14:
19	Group_change name_edit	Y	change group name test	change group name test	2017-03-07 16:
20	Group_change name	Y	change group name test	change group name test	2017-03-07 16:
21	shift4(Calendar1)	N	shift_calendar1_shift4(ZA,em,UK)	shift_calendar1_shift4(ZA,em,UK)	2017-03-07 19:
22	shift4(Calendar1)	N	shift_calendar1_shift4(ZA,em,UK)	shift_calendar1_shift4(ZA,em,UK)	2017-03-07 19:
23	ITA_Seqshift(Wendy em, Gina em, sms, 126)(Calendar1)	Y	ITA_polling+SeqShift+others	ITA_polling+SeqShift+others	2017-02-21 21:
24	shift2 0 to 8:00(Calendar2)	N	im2508 cal sub1	im2508 cal sub1	2017-03-09 16:
25	shift4_update(Calendar1)	N	shift_calendar1_shift4(ZA,em,UK)	shift_calendar1_shift4(ZA,em,UK)	2017-03-07 19:

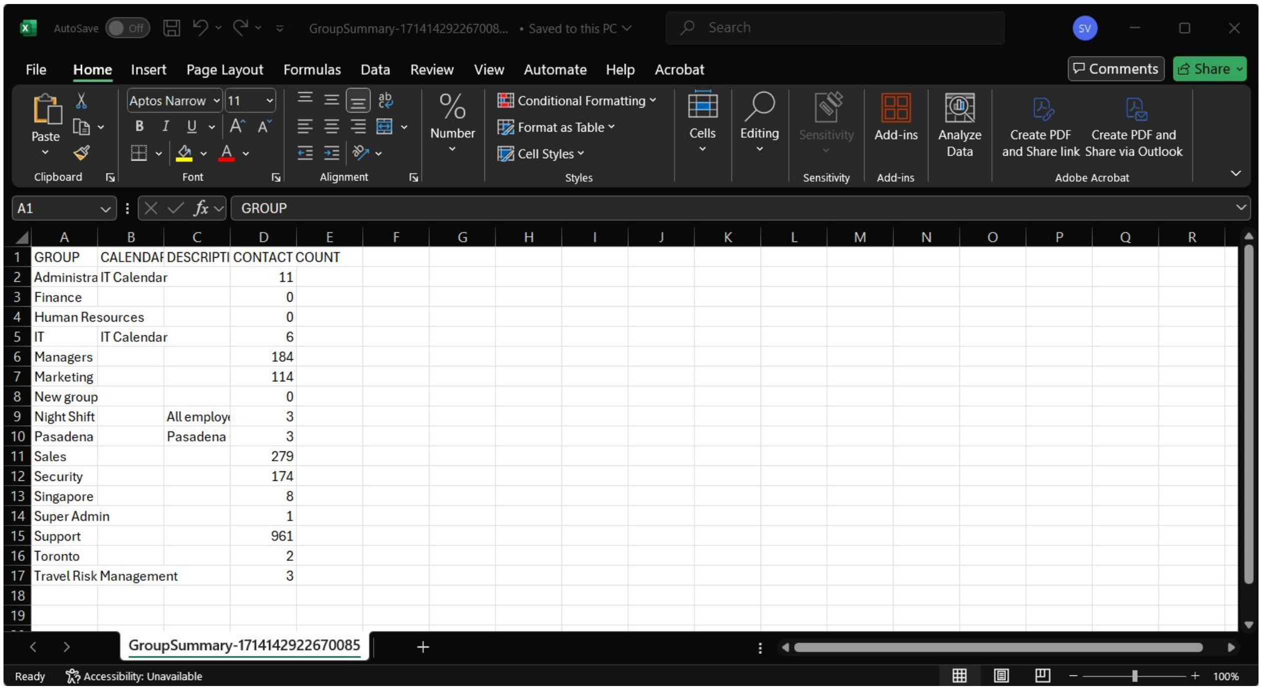
Group Summary

You can download a summary of your group. Select **Group Summary** from the **Quick Reports** pane, then click **Download CSV**.

On downloading any CSV-formatted file, Everbridge Suite screens the data before downloading to your local system. If any values start with **= + - @**, Everbridge Suite treats these values as suspicious content (except when - and + are followed by a number). The CSV-formatted file is downloaded using a TXT file extension and type.

An Alert message appears, letting you know that a link to the Group Summary report will be emailed to you.

Click the link in the email. Then, open the Excel spreadsheet to see the Group Summary. Readjust the columns as needed.



GROUP	CALENDAR	DESCRIPTI	CONTACT COUNT
Administra	IT Calendar		11
Finance			0
Human Resources			0
IT	IT Calendar		6
Managers			184
Marketing			114
New group			0
Night Shift		All employe	3
Pasadena		Pasadena	3
Sales			279
Security			174
Singapore			8
Super Admin			1
Support			961
Toronto			2
Travel Risk Management			3

Create Notification Quick Reports

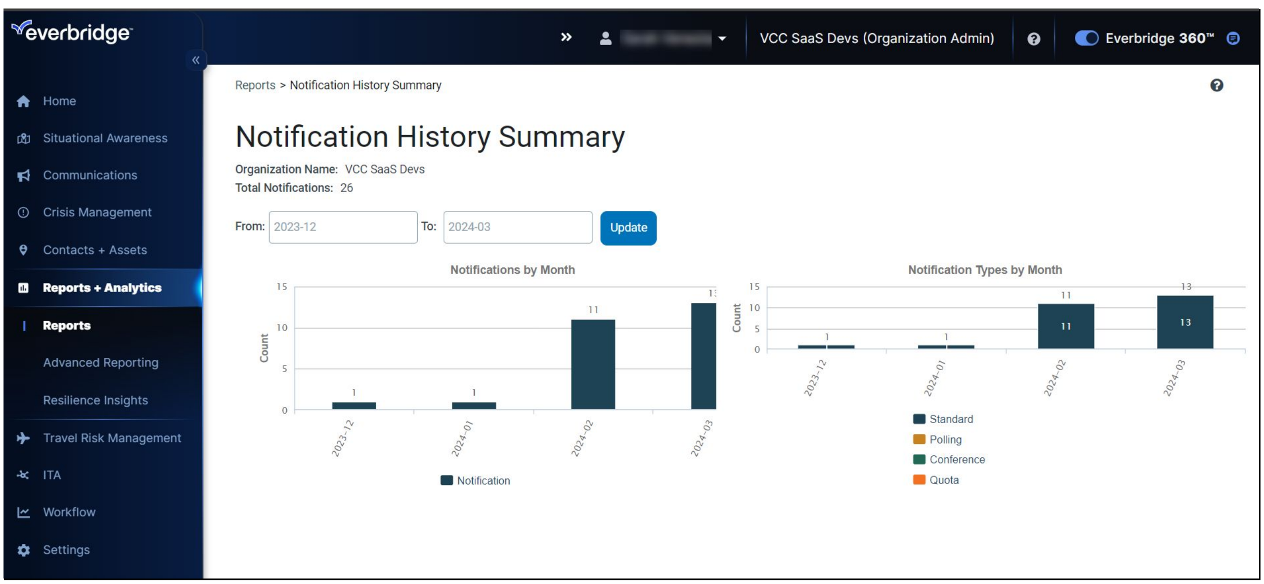
With the appropriate permissions, you can generate Quick Reports with the click of a button, or create and generate custom Notification reports.

If permitted, users can can create Notification reports as Quick Reports. The following quick reports are discussed:

- Notification Summary
- Event Analysis
- Detailed Notification Analysis
- Escalation Summary

Notification Summary

Notification Summary shows the count and type of Notifications sent during a time period. Select the **Notification Summary** link and the **Notification History Summary** page appears. Select the date range (YYYY-MM format) and click **Update**. You see the number of Notifications sent by month and by type.



Event Analysis

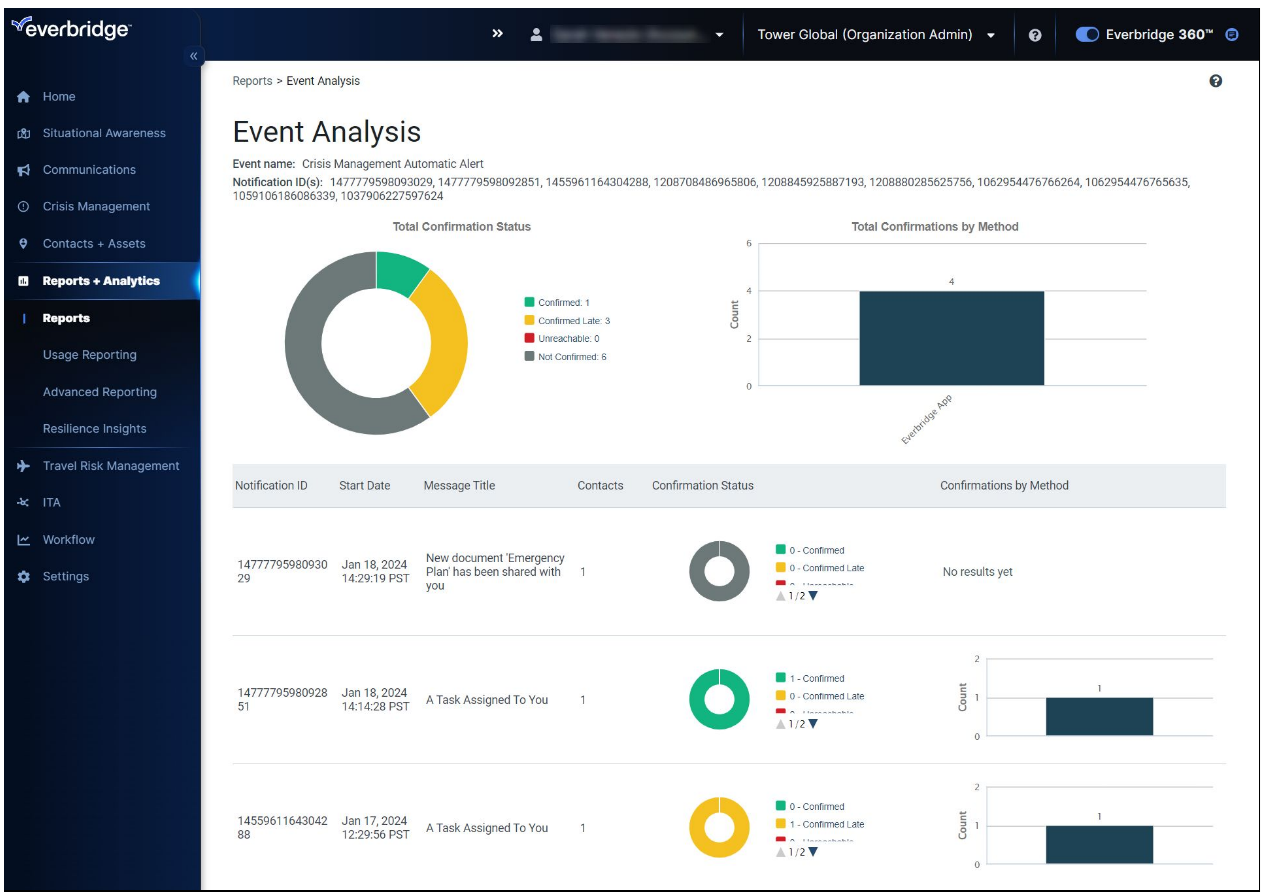
Event Analysis shows a summary of information across the Notifications that are part of an event. Click **Event Analysis**. Select an event from the menu and click **View Report**.

> **NOTE:** All events created for the Organization are populated in the menu. The most recent events are at the top of the list and the oldest events are at the bottom of the list.
>
> If you select an event where related Notifications are older than 18 months (or 540 days), the report returns with no results because Notifications older than 18 months have already been purged from the system. However, Incident Notification reports will be available for 19 months (or 568 days).

On the **Event Analysis** report, you see the Event name and all the IDs of all the Notifications that are part of the event. The charts show the total confirmation status and total confirmation by path across all the Notifications in the events.

- The **Total Confirmation Status** chart shows the sum of recipients in each of the confirmation categories.
- The **Total Confirmations by Method** chart shows the delivery methods that reached the contacts who confirmed.

Hover the mouse over a pie chart to see the percentage in a segment. Hover the mouse over a bar chart to see the total in a bar.



Below the totals, there is a row for each Notification that is part of this event. You can see the summary results for each Notification. The Notifications are in order with the oldest one at the bottom of the list, so you can trace the history of the event. Hover the mouse over the **Confirmation Status** chart or **Total Confirmations by Method** to see totals per Notification. Also, if the confirmation status shows **1/2**, click the down arrow to see the second part of the confirmations. Likewise, if it shows **2/2**, click the up arrow to see the first part of the confirmations.

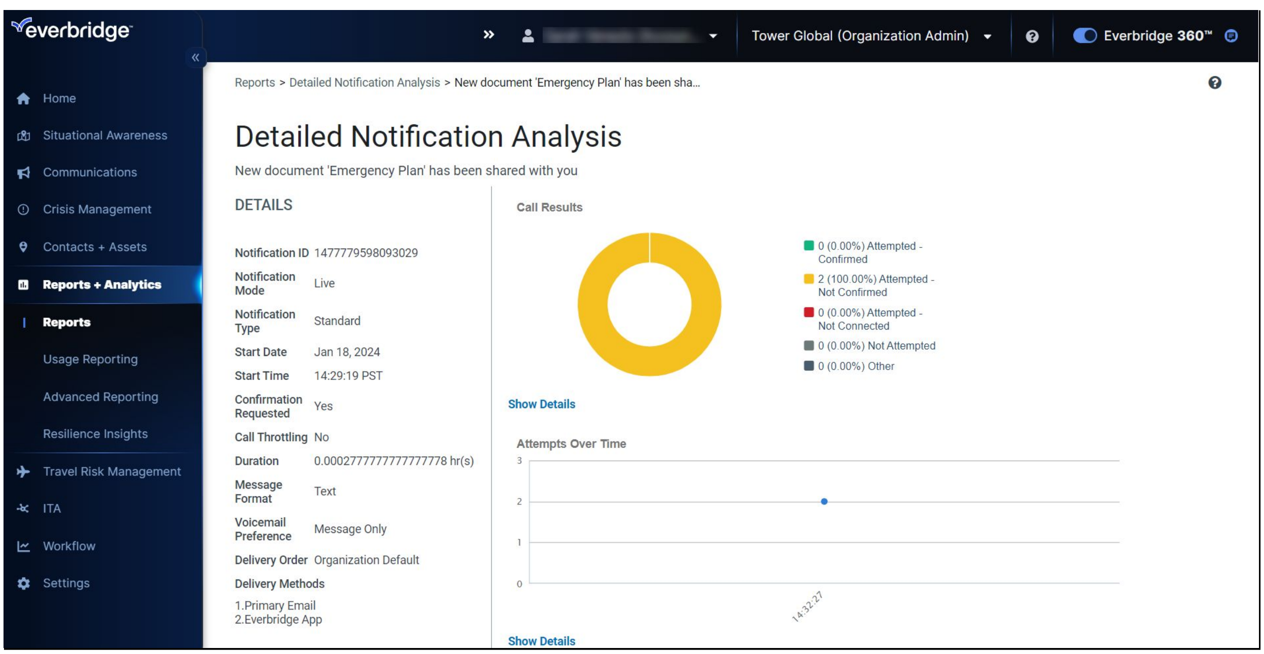
Detailed Notification Analysis

The Detailed Notification Analysis report shows a summary of information for a Notification selected from the Detailed Notification Analysis list.

> **NOTE:** You can also generate the Detailed Notification Analysis report directly from the Notification Details. Select the title of any Notification, and the Notification Details page is displayed. Select the icon next to the Notification name. The report is generated.

Call Results Details

Click **Show Details** to view the details of the call results summarized in the pie chart and the percentage of total calls.



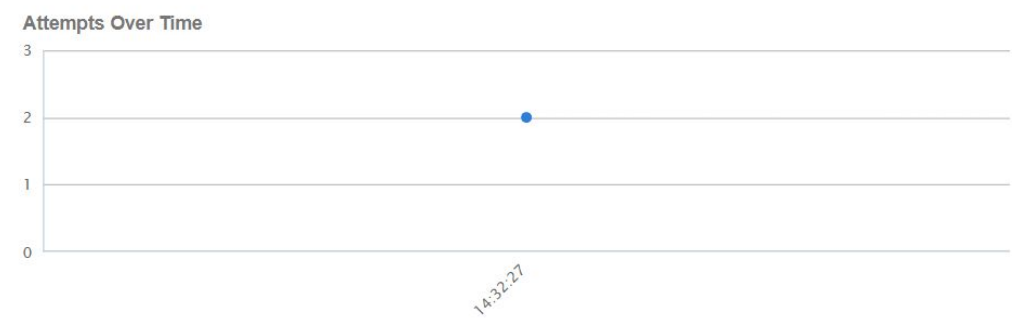
After a Notification is sent, you can view the information regarding the status of each contact attempt for all delivery method types. This is known as the call result on the Detailed Notification Analysis report. If the contact confirms receipt of the message, then the call result displays the date when the Notification was confirmed.

Attempts Over Time

The **Attempts Over Time** section shows, in 5-minute intervals, the number of attempts per delivery path for all delivery paths used in the Notification.

Attempts Over Time Details

Select **Show Details** to view the details in 5-minute intervals per path type.



Hide Details

Attempt Time	Delivery Method	Attempt 1	Attempt 2	Totals
Jan 18, 2024 14:32:27 PST	Primary Email	1	0	1
	Everbridge App	0	1	1
Jan 18, 2024 14:32:27 PST Subtotals		1	1	2
Totals		1	1	2

Escalation Summary

Escalation Summary reports show the escalations used in a Notification. Select the Notification from the menu and click **View Report**.

When viewing the report, click the **Escalation Summary** link to print or save the report as a PDF file. In the report, you can see a list of contact attempts in ascending, chronological order.

Custom Reports

The **Reports** module allows you to add Custom Reports, which cover multiple Notifications or Incidents and travel information for Travel Protector customers.

There are five levels of report types for Incidents:

- **Contacts** - provides information about the contacts.
- **Incident Notifications** - provides the attempt levels and paths contacted.
- **Incidents** - provides information about the incident.
- **Incident Scenario Notifications** - provides the attempt levels and paths contacted.
- **Incident Scenario** - provides information about the scenario.
- **Travel Segments** – provides information about travel itineraries, segments, and travelers.

> **NOTE:** See the Advanced Reporting Guide for more in-depth, granular reporting options.

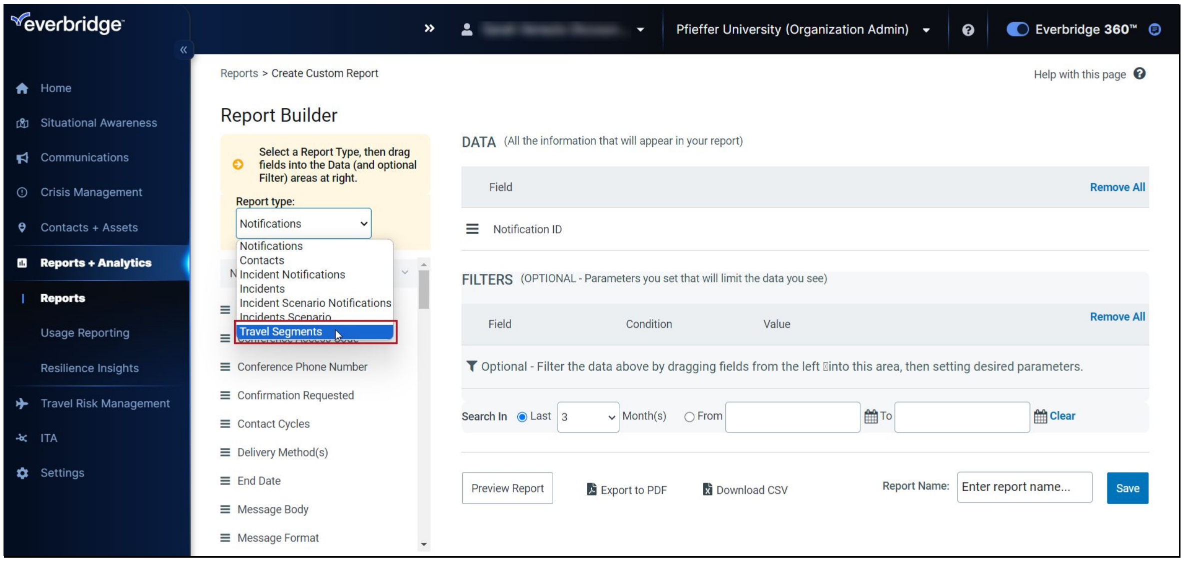
Travel Custom Reports

Travel Protector customers can run a report specific to Travel Segments. To add a new Travel Custom Report:

> **NOTE:** You must add **at least one** data field related to Traveler information, such as first name, last name, or record type, along with at least one data field related to a travel segment.

1. From the **Reports** tab, click **Create Report**. The **Report Builder** page is displayed.

2. On the left-hand pane, select the **Travel Segments** Report Type from the menu.



3. After selecting the Report Type, data fields will appear under the report type you selected. To add a data field to your report, drag a data field to the **DATA** panel. To delete a chosen data field, click the Trash Bin next to the field name. When you add fields to the DATA panel, they are added at the bottom of the list. When the fields are displayed in the report, they are displayed from left to right.
4. Repeat Step 3 for all data fields you want in your custom report.
5. Set filters to narrow down the data to the values in which you are interested. Filters are optional. For example, you might only want to see travelers arriving in a specific country.
    a. To add a filter, drag a data field to the **FILTERS** panel.
    b. Select the desired condition statement from the drop-down list.
    c. Type or select the desired value in the correct format for the data type in the **Value** field.
6. Repeat Step 5 for each desired filter. To delete a filter, click the Trash Bin next to the field name.
7. Select a time frame of either **Now** (default) or enter a specific range (Past or Next xx hours or days). The maximum date range is 365 days, or a custom time range by specifying the start and end days (Maximum is one year between the start and end dates).
8. Click **Preview Report** to review your customizations. Use the Page Controls at the bottom of the page if you would like to view more records.
    - To choose the number of records displayed on each preview page, select a number from the drop-down list.
    - To add more data to your report, repeat step 3. To add more filters to your report, repeat step 5.

9. After the report has been configured and the preview shows you the desired data, you can export the results to a CSV file. Many software applications, including Microsoft Excel, can open a CSV file.
10. To save the report under the Reports tab, enter a name in the **Report Name** field and click **Save**. If at any time in the future you would like to run this report with updated data, click the report name under **Custom Reports**.

NOTE: Use the Excel Data Import feature to import the CSV-formatted file into an Excel workbook.

Example Travel Custom Report

The following procedure provides the steps to create a custom report for travelers who are traveling by Air to Germany in the next 30 days. Contact reports are helpful for resolving missing data, such as a delivery method.

To create a report of travelers traveling by Air to Germany in the next 30 days:

1. On the left-hand pane, select **Travel Segment** from the **Report Type** drop-down list.
2. Drag the following data fields to the **DATA** panel:
   - >**First Name**
   - **Last Name**
   - **Traveler Report Type**
   - **To Date**
   - **PNR** (Optional)
3. To filter the data by country and time range:
   a. Drag the **Arrival Country** data field to the **FILTERS** panel.
   b. Under **Condition**, select **contains**.
   c. Under **Value**, select **Germany**.
   d. In the Search By section select **Specific Range**.
   e. Select **Next** and **Days** in the drop-downs and enter **30**.
4. Click **Preview Report** to review your customizations. If you want more data or filters added to your report, repeat Steps 2 and 3.
5. To save the report to your device, you can export it by clicking **Download CSV**.
6. To save the report under the **Reports** tab, enter a name next to **Report Name**. Click **Save**.

NOTE: Do not open the CSV file until the file is finished processing. Excel will shorten long External Ids if the file is opened before processing is finished.

Glossary

This glossary provides definitions for key terms used in this guide and within Everbridge Suite, as well as definitions for terms commonly found throughout the software as a service (SaaS) and critical event management (CEM) industries.

10DLC

10-Digit Long Code.

Access Control List

Access Control List (ACL) is used within a Microsoft environment to determine who has access rights to a document or file share and what rights they are.

Account Administrator

As the most-provisioned users, Account Administrators have administrative access at the Account level and each of its child Organizations. They manage Account-level or Organization-level settings while also granting users access to various areas of Everbridge Suite, among other high-level responsibilities.

ACS

Access Control System. Technology that manages who can access and use specific resources, such as physical buildings, devices, networks, websites, or cloud resources.

ADFS

Active Directory Federation Services.

Advanced Reporting

Everbridge's next-generation reporting solution that enables users to evaluate their Organization's many important use cases. Built on Google Looker and utilizes Communications and Resilience Insights data.

Alert Subscription

Categories of Notifications that contacts can subscribe to in order to receive updates.

Alertus

An Everbridge partner that provides desktop alerts, alert beacons, and digital signage.

API

Application Program Interface. A set of routines, protocols, and tools that allow your software and programs to communicate with the Everbridge Suite.

Application Delivery Controllers

Physical or virtual appliances functioning as proxies for physical servers or virtual servers, such as F5 load balancers.

Assets

The physical or virtual entities that your Organization cares about other than contacts, such as buildings and employees.

Audio Bulletin Board

Allows users to post an audio message that employees and residents can retrieve at their convenience using an Everbridge-provided phone number.

B2B

Business-to-business, meaning a commercial transaction between two businesses.

B2C

Business-to-customer means a company, such as an online retailer, sells a product directly to the consumer.

Broadcast Cycle

The number of times the Everbridge application should attempt to notify your contacts.

Broadcast Duration

How long the Everbridge application should attempt to notify your contacts and for how long your contacts should have to confirm receipt of your Notification.

Call Throttling

A feature used to control the number of simultaneous phone calls made to your jurisdiction or to your locations.

CEM

Critical Event Management.

Certificate Authority

A company that produces and sells SSL certificates.

CMAS

Commercial Mobile Alert System. See WEA.

CMDB

Configuration Management Database. Used with Incident Communication.

Common Alerting Protocol

Common Alerting Protocol (CAP) is an XML-based data format for exchanging public warnings and emergencies between alerting technologies. CAP allows a warning message to be consistently disseminated simultaneously over many warning systems to many applications, such as Google Public Alerts. CAP increases warning effectiveness and simplifies the task of activating a warning for responsible officials.

Communications

Encapsulates the Incident, Notification, and SnapComms data and functionality within Everbridge 360.

Conference Bridge

A Notification Type that alerts contacts to join a conference call.

Contact

A client message recipient.

Contact Cycle

Determines the number of delivery attempts Everbridge will make across all device types for a contact who has not yet confirmed. If confirmation is disabled, it controls the attempts across all delivery methods for all cycles.

Contact Upload

Upload a CSV file with contact information to create multiple contacts in bulk within Everbridge Suite.

Country Calling Code

A numeric code that precedes a phone number that specifies which country the phone number belongs to.

CRS

Computer Reservation Systems (or Central Reservation Systems) are computerized systems that store and retrieve information and conduct transactions related to air travel, hotels, car rental, or other activities.

CSV

Comma Separated Value.

CTI

Computer-Telephony Integration. A product that enables companies to integrate their phone and digital interactions into one interface.

Data Privacy Policy

An additional layer of data control built on the role-based access control (RBAC) framework. Allows Administrators to restrict Group Managers' access to sensitive information without hindering their ability to view relevant contact data within Everbridge Suite.

Delivery Method

A way a contact can receive a Notification, such as via email, SMS, pager, or phone.

Delivery Order

Allows you to select the order of the delivery methods used for the Notification.

DHS

Department of Homeland Security.

DKIM

DomainKeys Identified Mail. A method for validating the identity of email senders to avoid spoofing by validating a domain name identity associated with a message through cryptographic authentication.

DKIM Certificate

A public-private key pair. The private key generates the encrypted DKIM signature and the public key decrypts the DKIM signature.

DKIM Signature

A block of text in the header of an email that, when decrypted, validates the identity of the sender of the email.

DMS Geocoding

A method of geocoding that uses Degree/Minute/Second to establish coordinates.

DRP

Disaster Recovery Plan.

Dynamic Group

Groups that update based on contact-specific criteria when a Notification is sent.

Dynamic Location

Describes a contact's temporary location. This location may be an actual Last Known Location or an Expected location based on the contact's travel plans. Dynamic location information can be fed into the system manually or by automated upload.

EAS

Emergency Alert System. A national public warning system commonly used by state and local authorities.

EBU

Everbridge University.

EDA

Everbridge Desktop Alerting.

ELO

Emergency live operator.

EMA

Everbridge Mobile App.

EPW

Everbridge Public Warning.

ESRI

Environmental Systems Research Institute.

EU

European Union.

Event

A group of Notifications for the same Incident or event in your Organization.

Everbridge 360

The optimized user interface that combines Notifications and Incident Communications into a single Communications module.

Everbridge Mobile App

The legacy mobile application that allows contacts to receive Notifications and interact with the message senders with features like sharing geolocation information, pictures, and free-form text. Not to be confused with the Everbridge 360 Mobile App.

Everbridge University

A comprehensive self-service resource that trains users to leverage Everbridge solutions effectively. Includes role-based training, certification paths, interactive courses, best practice webinars, and micro-learning videos.

Expected Location

Where the system believes a Dynamic Contact (aka traveler) should be located based on the contact's travel plans.

FCC

Federal Communications Commission.

FEMA

Federal Emergency Management Agency. Created by the Department of Homeland Security to coordinate the response to a disaster at the Local, State, or Federal level.

FTP

File Transfer Protocol.

GDPR

General Data Protection Regulation. A regulation created by the EU that regulates the collection and use of personal data.

GDS

Global Distribution System. An international computerized reservation system that allows buyers to book and view live inventory from a wide range of suppliers such as airlines, hotels, and car rentals.

Geocode

Verification of the latitude and longitude of a contact's address.

Geocoding

The process of taking certain location-related data, such as a country, state, city, and street address, and converting it to geographic coordinates that can be used to pinpoint the described location on a global map.

GIS

Geographic Information System. Used to indicate that a Notification was sent from the Universe tab.

GMC

Global Message Credits.

Groups

Static lists of contacts that are maintained by users. Groups typically represent a set of contacts sharing commonalities, such as a shared primary office or administrative role.

GSLB

Global Server Load Balancing. Intelligent distribution of traffic across server resources located in multiple geographies. The servers can be on-premises in a company's own data centers, or hosted in a private cloud or the public cloud.

GSOC

Global Security Operations Center.

GUI

Graphical User Interface.

HAR File

HTTP Archive, HTTP Archive format, HTTP Archive file, HTTP Archive file format. A JSON-formatted archive file format for logging a web browser's interaction with a site.

HTML

Hypertext Markup Language.

HTTP

Hypertext Transfer Protocol.

HTTPS

Hypertext Transfer Protocol Secure.

IATA

International Air Transport Association. The trade association for the world’s airlines.

IATA Airline Designator

A 2-letter code that identifies an airline. On airline boards and tickets, they are coupled with the Flight Number, such as DL1234, where “DL” is the designator for Delta Airlines and 1234 is the flight number.

IATA Location Identifier

A 3-letter code that identifies an airport or railway station location. For example, LHR represents London Heathrow Airport.

IDS

Intrusion Detection System.

IIS

Internet Information Services. A feature of the Microsoft Server OS that provides the server with a default website address.

Incident Management

The automation of an Organization's Incident Communication plan. An Organization's Communication Plan is comprised of Incident Templates, which include the necessary components to deliver Notifications: message, contacts, and Notification settings.

Incident Template

A predefined template tailored to a specific communication plan.

Incident Variables

A custom field that administrators can add to the input form of an Incident Template to collect critical information about an Incident.

Incident Zone

A shape-created geofence that designates an area of activity.

Interactive Visibility

The communications console of the Universe tab that utilizes Twitter, Member and Safety messages, weather alerts, and more to gather real-time data.

iPaaS

Integration Platform as a Service. Enables the automation of Incident Communications based on defined criteria for events that can be sent through a Smart Orchestration workflow.

IPAWS

Integrated Public Alert & Warning System. Hosted by FEMA and available to all public safety agencies in the United States; Everbridge offers integration with this message-blasting gateway via our Everbridge Suite product to any pre-approved public safety agency.

ISD

Instructional Systems Design.

ISO

International Organization for Standardization. An independent, non-governmental international organization that develops standards, comprised of representatives from national standards organizations in member countries.

ISOS

International SOS. A medical and security services company whose products can be integrated with Everbridge Safety Connection.

ITA

Information Technology Alerting. An Everbridge product that enables automated integration between customers' Everbridge Notification workflow and their on-call Scheduling, Alerting, and Incident Management processes.

ITTL

Imminent Threat to Life. A priority designation assigned to Notifications and Incidents for emergency events that can cause significant injury or loss of life. These messages will bypass the recipients' Silent setting or "Do Not Disturb" mode on Apple mobile devices.

IVR

Interactive Voice Response. A technology that allows a computer to interact with humans through the use of voice and DTMF tones input via keypad.

JSON

JavaScript Object Notation.

KB

Knowledge Base.

KML

Keyhole Markup Language. A KML file stores geographic modeling information in XML format. It includes points, lines, polygons, and images. KML files identify and label a defined area on the earth.

KMZ

A KML file in a compressed/zipped format.

Last Known Location

Describes a Dynamic Contact’s, (aka traveler’s), actual last known location. This location information may be obtained by the system in various ways, including manual and automated uploads from GPS tracking devices, mobile apps and more. LNL differs from Expected Location in that an Expected Location is where the system believes the user should be based upon travel plans.

LBAS

Location-Based Alert System.

LDAP

Light Directory Access Protocol. Queries data from MS Active Directory and other directories.

Long Code

A long code number is a standard phone number used to send and receive voice and SMS messages. Phone numbers are typically called "long codes" (10-digit numbers in many countries) when comparing them with SMS short codes (5-6 digit numbers).

LTE

Long-Term Evolution. A standard wireless broadband communication for mobile devices and data terminals.

Manager Portal

Used interchangeably with "Mass Notifications" or "Everbridge Suite".

Map Layers

An overlay on the map used to reference information. Map layers may include structures, contact location, and weather.

MDM

Mobile Device Management.

Member Portal

An extension of an Everbridge Organization where contacts can register for alerts specific to that Organization. There are two types of Member Portals: Public, which are accessible to everyone, and Private, which are accessible only to invited users.

Message Template

A precomposed message that can be used when sending a Notification.

MFA

Multi-factor Authentication.

MMS

Multimedia Messaging Service. Similar to SMS, but the sender can send images in the message.

Multi-factor Authentication

An authentication method that requires the user to provide two or more verification factors to gain access to a resource (application, online account, VPN, etc.).

NC4

A safety and security solutions service provider that can be used in conjunction with Everbridge.

NIFC

National Interagency Fire Center. The current source of wildfire data for Visual Command Center.

NIMS

National Incident Management System, run by FEMA.

Nixle

A public safety communication platform that delivers real-time, location-based alerts to individuals. Local agencies use it to send critical information about events like severe weather, criminal activities, or traffic incidents.

NLP

Natural Language Processing.

NOAA

National Oceanic and Atmospheric Administration. A Department of Commerce government agency.

Notification Escalation

A feature used in Notifications to contact additional sets of message recipients if an expected number of responses is not met.

Notification Template

A predefined Notification tailored for specific contacts or groups.

NTP

Network Time Protocol. A method used by IT systems to keep the time on all of their servers in sync. Using NTP requires that all systems have access to the designated NTP server.

NVP

Notification Voice Platform.

NWEM

Non-Weather Emergency Messages. Send NWEMs over NWR.

NWR

NOAA Weather Radio.

NWS

National Weather Service.

OpenPGP

The most widely-used email encryption standard. It is defined by the OpenPGP Working Group of the Internet Engineering Task Force (IETF) as a Proposed Standard in RFC 4880.

Organization

A logical representation of a client's collection of contacts, templates, and reports. Client users may be given permission to access a specific Organization; client contacts are loaded into an Organization.

OTP

One-time password.

PABB

Premium Audio Bulletin Board.

PBX

Private Branch Exchange. A switching system that provides intercommunication between telephones.

PIAM

Physical Identity and Access Management. A framework of policies, technologies, and business processes that manage physical access to facilities

PII

Personally Identifiable Information.

PKI

Public Key Infrastructure. A set of roles, policies, and procedures needed to create, manage, distribute, use, store, and revoke digital certificates and manage public-key encryption.

Point Address Data

Uploaded geocoding data for addresses. Using point address data matches the stored addresses to contact address data: exact matches are geocoded on the contact records.

Polling

A Notification Type that allows contacts to respond to a list of choices.

Pre-Trip Advisory

A Notification to educate travelers before traveling by providing key information about countries and regions such as visa, document and vaccination requirements, advice on security, health, laws, culture, etc.

PSIM

Physical Security Information Management. Category of software designed to integrate multiple unconnected security applications, enable automation of workflows and processes, and provide control over devices through a unified user experience.

Quick Reports

A set of preconfigured legacy reports used for summarizing and analyzing Notifications, Incidents, and contact performance. Not to be confused with Advanced Reporting.

Quotas

Used with Polling Notifications, quotas set required amounts for specific responses.

RCA

Root Cause Analysis.

REI

Risk Event Interface. Allows users to add their own Risk Event feeds.

Response Subscriptions

Response Subscriptions allow you to receive confirmations and polling responses from Notification recipients and put those responses into your third-party systems.

REST API

Representation state transfer. An API or web API that conforms to the constraints of REST architectural style and allows for interaction with RESTful web services. Also referred to as RESTful API.

RIMC

Everbridge Risk Intelligence Monitoring Center

Role

A designation for a user account's set of privileges when accessing Everbridge Suite.

Rule

A dynamic method to select contacts based on data fields for a Notification.

S3

Amazon Simple Storage Service.

SaaS

Software as a Service.

SAML

Security Assertion Markup Language (SAML, pronounced sam-el) is an open standard for exchanging authentication and authorization data between parties, in particular, between an identity provider and a service provider.

Scenario

A collection of Incident Templates used to notify different audiences with different messages at the same time.

Secure Messaging

Industry-compliant, application-based mobile messaging. Used in the Everbridge Mobile App.

Secure Push

A feature that sends a Notification to a Secure Messaging application.

Segment

A part or leg of an air itinerary, including one takeoff and one landing.

Sender Caller ID

The number that displays on a contact's phone when receiving a Voice Notification.

Sender Email Address

The address that displays in the "From" field when receiving an email Notification.

Sender Email Display

Allows you to change the email address to something more recognizable to recipients, making them more likely to open it. Everbridge recommends using a real name for your Alert system instead of an email address to prevent emails from being accidentally marked as phishing attempts.

SFTP

Secure File Transfer Protocol. Allows for secure and encrypted file transfers between a client and a server over a public network, such as the Internet.

Shapefile

A simple, nontopological format for storing the geometric location and attribute information of geographic features.

Short Code

Short digital sequences that are used to address messages in the MMS and SMS systems. They are shorter than telephone numbers, which are also known as long codes. The complete list of codes Everbridge uses is available in the Support Center.

Single Sign-On

Single sign-on (SSO) is an authentication method that enables users to securely authenticate with multiple applications and websites by using a single set of credentials.

SMART Weather

A premium weather alerting feature that utilizes weather alerts and thresholds for targeted automated Notifications.

SMS

Short message service, also known as text messaging.

SMTP

Simple mail transfer protocol, i.e., username@domain.com.

SORCH

Smart Orchestration.

SQL

Structured Query Language . Used to retrieve data from relational databases, such as Oracle and MS SQL Server.

SSH

Secure Shell. Way to securely communicate with a remote computer.

SSL

Secure Sockets Layer.

SSO

Single Sign-On.

Static Location

A contact's location that is considered permanent, such as a work or home location. A contact may have more than one Static Location listed in the system.

TAP

Telocator Alphanumeric Protocol. An industry standard for sending short messages to a pager or mobile phone provider using a landline modem.

TAR File

Tape Archive File. Although not compressed, it is used as a container, inside which are files of other types. TAR files are used in tape-back backup systems.

TASS

Trusted Associate Sponsorship System.

TCP

Transmission Control Protocol. Communication standard that enables application programs and computing devices to exchange messages over a network.

TFN

Toll-Free Number. Often used as an acronym when discussing the New Voice Path (NVP) features and functions.

Thresholds

Criteria that determine when to launch a Notification or Incident Template. Used for weather and Twitter alerts, as well as Safety and Member Messages.

TLS

Transport Layer Security (TLS Protocol). Encrypts data sent over the internet.

TMC

Travel Management Company. Travel agencies that manage organizations' corporate or business travel programs. They will often provide an end-user online booking tool. These companies use Global Distribution Systems (GDS) to book flights for their clients.

Travel Segment

Individual flights, hotels, cars, train, etc. that, when combined, make up a travel itinerary/reservation.

TRM

Travel Risk Management.

UI

User Interface.

Universe

An interactive map that allows message senders to view or select contacts via shapes or contact layers. Different widgets can filter and view messages or alerts sent to or from the Organization.

UNS

Universal Naming Convention. Specifies a common syntax for describing the location of a network resource such as a shared file, directory, or printer.

URI

Uniform Resource Identifier. There are two types: URN and URL.

URL

Uniform Resource Locator. A type of URI. URL specifies a location on the computer network and a technique for retrieving it. All URLs can be URIs but not all URIs can be URLs because a URI can be a name instead of a locator.

URN

Uniform Resource Name. A type of URI. URN is an internet resource that specifies URN scheme.

User

A person with access to perform specific functions for an Organization within Everbridge Suite, such as sending Notifications.

Variable

A custom field that administrators (Incident Administrators, Organization Administrators, and Account Administrators) can add to the Operator Form of an Incident template.

VCC

Visual Command Center.

VIP

Virtual IP. A virtual IP address is an IP address that doesn't correspond to an actual physical network interface (port).

Voice Delivery PIN

A numeric code that contacts must enter before hearing a Voice Notification.

Voice Greeting

An automated message that plays before a Voice Notification.

VOIP

Voice over Internet Protocol. Allows you to make voice calls using a broadband Internet connection instead of a regular (or analog) phone line.

WCTP

Wireless Communication Transfer Protocol. A messaging and paging protocol that allows for the transmission of binary and alphanumeric messages between automated systems and two-way messaging devices.

WDTP

Weather Decision Technology.

WEA

Wireless Emergency Alerts.

Webhook

A feature used to update a client-controlled webpage with Notification-specific information.

WMS

Web Mapping Service. A protocol that allows users to access geospatial data maps and information about the map's features via the internet.