



# Everbridge 360 Responses User Guide

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# Introducing Everbridge 360 Responses

**Everbridge 360 Responses** (formerly known as "Everbridge 360 Critical Events") are designed to help organizations respond to emergencies with speed, precision, and consistency. By streamlining workflows and standardizing processes, the platform reduces response times, minimizes errors, and strengthens situational awareness during Response Management.

With Everbridge 360 Responses, users can:

- **Accelerate Response Time** - Move from alert to coordinated action in seconds, ensuring rapid intervention when every moment counts.
- **Maintain Complete Situational Control** - Gain comprehensive awareness and proactive oversight to support informed decision-making and swift responses.
- **Ensure Consistent Process Excellence** - Apply standardized templates and procedures to guarantee uniform, reliable responses across all situations.

This guide provides step-by-step instructions and best practices to help leverage Everbridge 360 effectively, ensuring customers are fully prepared to create and manage Responses with confidence.

## Prerequisites

There are certain prerequisites that must be met in order to use Everbridge 360 Responses:

- Enabling the Everbridge 360 Interface
- Enabling Everbridge 360 Responses
- Permitting User Roles

### Enabling the Everbridge 360 Interface

The Everbridge 360 interface is the updated, streamlined version of the Manager Portal that aims to better integrate and unify functionality across multiple core products, such as Visual Command Center, Alert Management, and Communications.

It must first be enabled by an Organization Administrator at the Organization level. From there, individual users can toggle it on and off for their profile as needed.

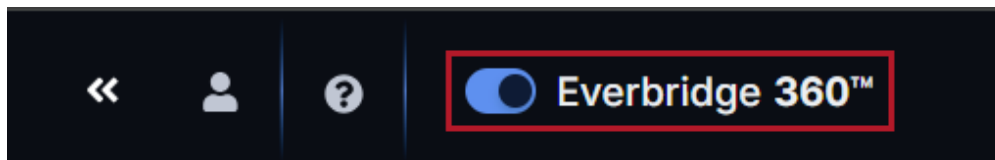
#### Enabling at the Organization Level

An Organization Administrator must first enable the Everbridge 360 interface at the Organization level if it hasn't been done so already. To do this:

1. Navigate to **Settings > Everbridge 360 > Default Settings**.
2. Toggle the **Everbridge 360** switch **ON**.
3. The page will refresh with the Everbridge 360 applied instead of Everbridge Classic.

#### Applying the Everbridge 360 Interface

Once enabled at the Organization level, users can apply the Everbridge 360 for their specific Manager Portal instance by clicking the **Everbridge 360** toggle in the top menu bar.



**NOTE:** For more details on the Everbridge 360 interface and its functionality, see the [Everbridge 360 User Guide](#).

## Permitting Everbridge 360 Response Management for User Roles

Once Everbridge 360 has been enabled and applied to the interface, an Organization Administrator must grant Everbridge 360 Response Management permissions for any user Roles that will be using it.

The following Role types can be provisioned to use Everbridge 360 Responses:

- Organization Administrator (enabled by default)
- Incident Administrator (configurable)
- Incident Operator (configurable)
- Custom Role (configurable)

### Enabling User Role Permissions

To enable these permissions:

1. Navigate to **Settings > Access > Roles**.
2. Under **Permissions**, enable at least the following three permissions for the desired Roles to allow them to launch Everbridge 360 Responses:

- **Everbridge 360 > Access Everbridge 360 Responses**

**EVERBRIDGE 360**

- Access Everbridge 360 Responses
- View Communications in Responses
- Launch and manage Communications in Responses

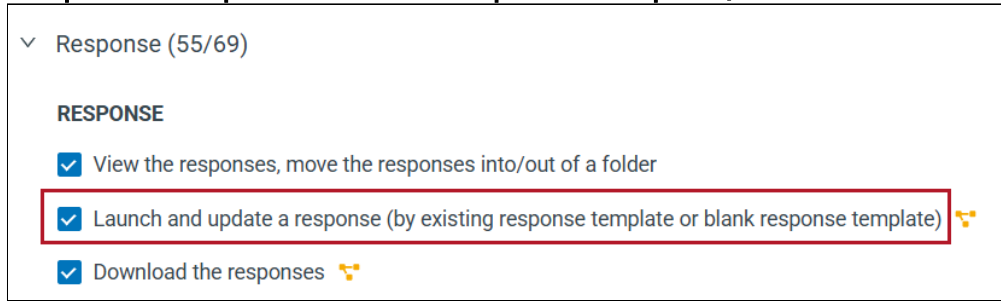
- **Responses > Response > View the Responses, move the Responses into/out of a folder**

▼ Response (55/69)

**RESPONSE**

- View the responses, move the responses into/out of a folder
- Launch and update a response (by existing response template or blank response template) 🚀
- Download the responses 📄

- Responses > Response > Launch and update a Response (by existing Response template or blank Response template)



3. Optionally, enable any of the following permissions to allow greater autonomy for a Role when launching or managing a Response or Response Template:
  - View Communications in Responses
  - Launch and manage Communications in Responses
  - View Communication Templates in Response Templates
  - Add, update and delete Communication Templates in Response Templates
4. Click **Save**.

## Considerations

When working with Everbridge 360 Responses, keep the following considerations in mind:

### User Flows

Everbridge 360 Responses user flows are available alongside the existing **Classic Response Management user flows**, allowing for flexible adoption.

### Templates in Everbridge 360 to Launch Responses

Users can utilize any existing Response Templates that their Role currently has access to.

### Event Types

In Everbridge 360 Responses, the **Event Type** dropdown references Everbridge 360 Event Types instead of the **Classic Response Event Types**.



## Known Issues and Limitations

Note that some functionality available in the Classic Everbridge Response Management flow aren't yet available in Everbridge 360 Responses, specifically when launching a Response and using bulk actions from the Response List.

### Launching a Response

Keep the following limitations in mind when launching an Everbridge 360 Response:

- Custom Fields can't be added on-the-fly to a Response during launch. They must be included in the selected Response template in order to be used.
- Responses don't honor the "Turn off notifications for task assignment and dashboard sharing" setting when launching Response Templates. Notifications will always be sent for Task assignments and Dashboard sharing for Responses launched via the Everbridge 360 Responses interface.

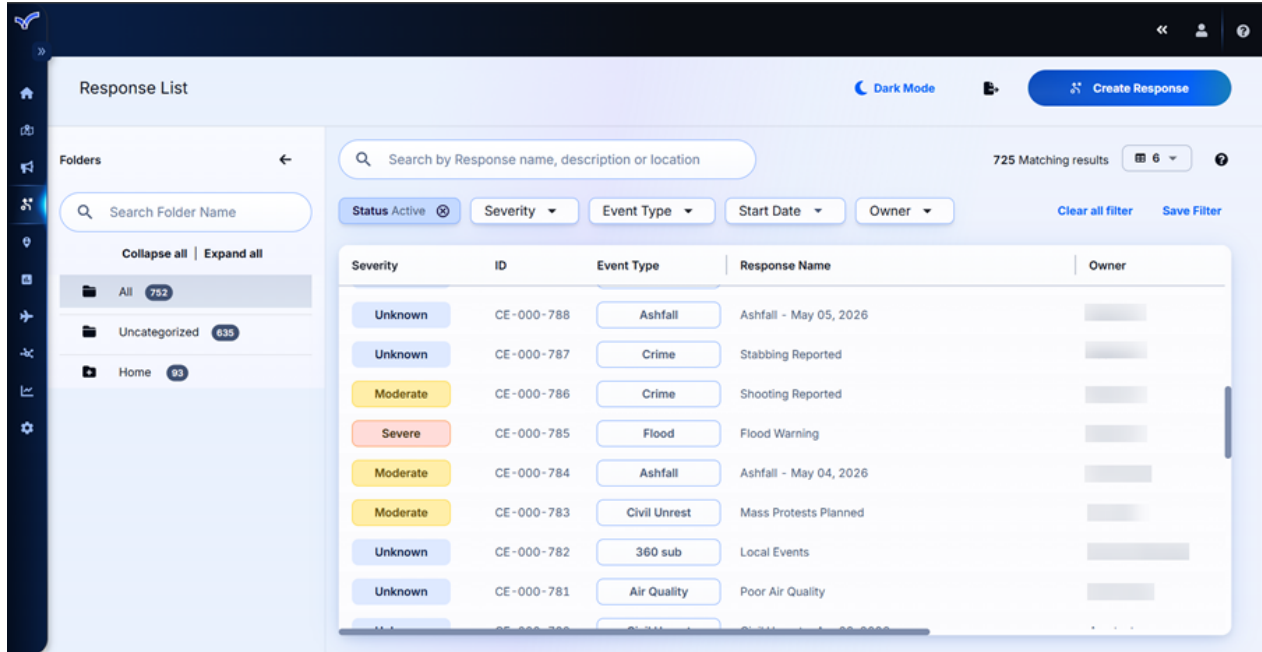
### Response List

The **Response List** doesn't currently offer the capability to perform bulk actions, such as deleting Responses, or publishing and unpublishing to Contacts.

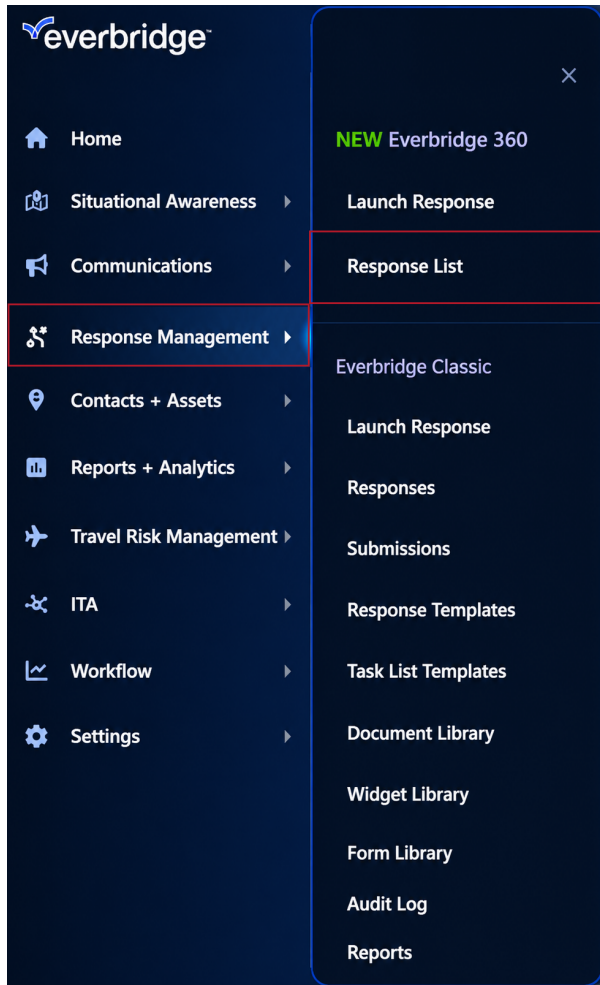


## Everbridge 360 Response List

The **Response List** displays all Responses launched within an Organization. Folders, filters, search and configurable columns make it easier than ever to quickly locate the desired Response and address it.



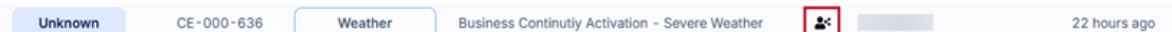
The Response List can be found by navigating to **Response Management > NEW Everbridge 360 > Response List**.



## List Icons

There are two different icons that can appear for a Response in the List View:

- **Published to Member Portal** - Indicates that this Response was shared with Contacts via the Member Portal.

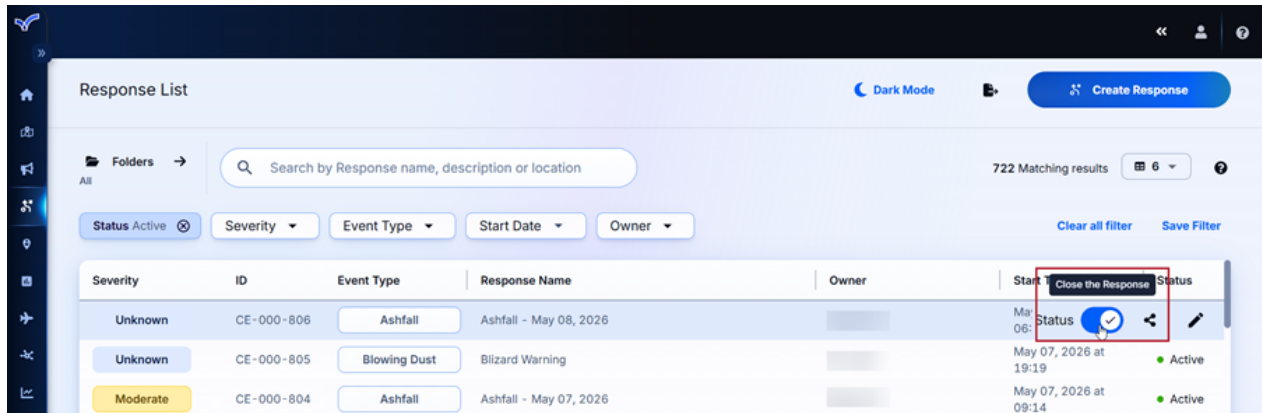


- **Launched as Exercise** - Indicates that this Response was launched in Exercise Mode.



## Response Quick Actions

Hover the cursor over a Response in the List to open its **Quick Actions** panel.



From there, the following actions can be performed:

- **Close or Active** - Click the toggle to either Close an Active Response or reactivate a Closed Response.
- Share
- Edit

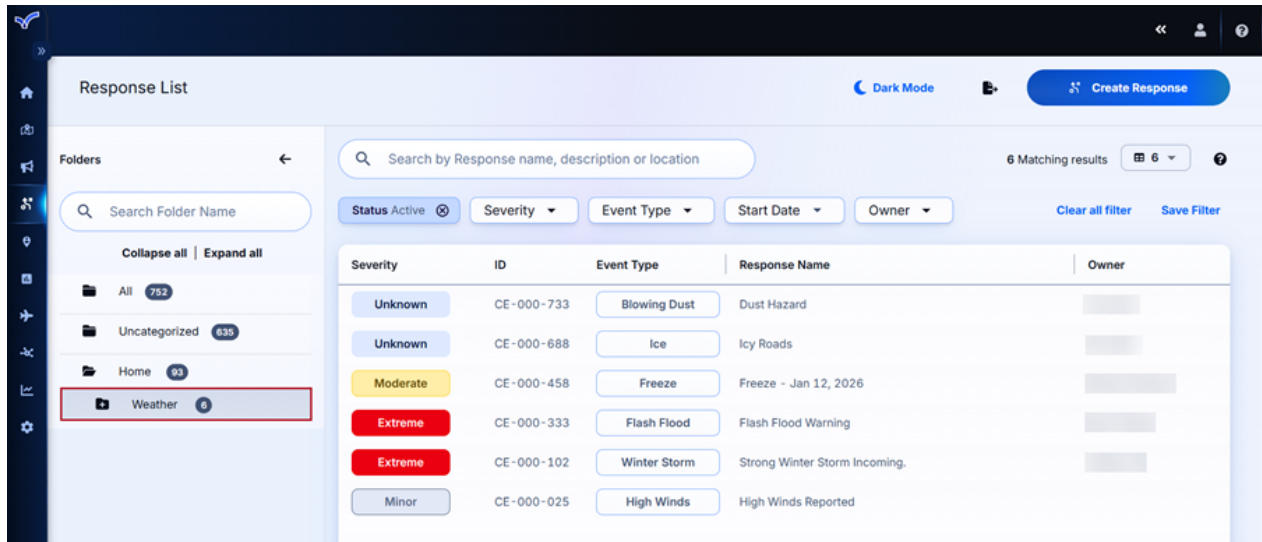
## Folders

When launched, Responses can be sorted into **Folders** to allow for cleaner, more organized navigation. The number next to the Folder name indicates how many Responses it contains.

There are two Everbridge system Folders:

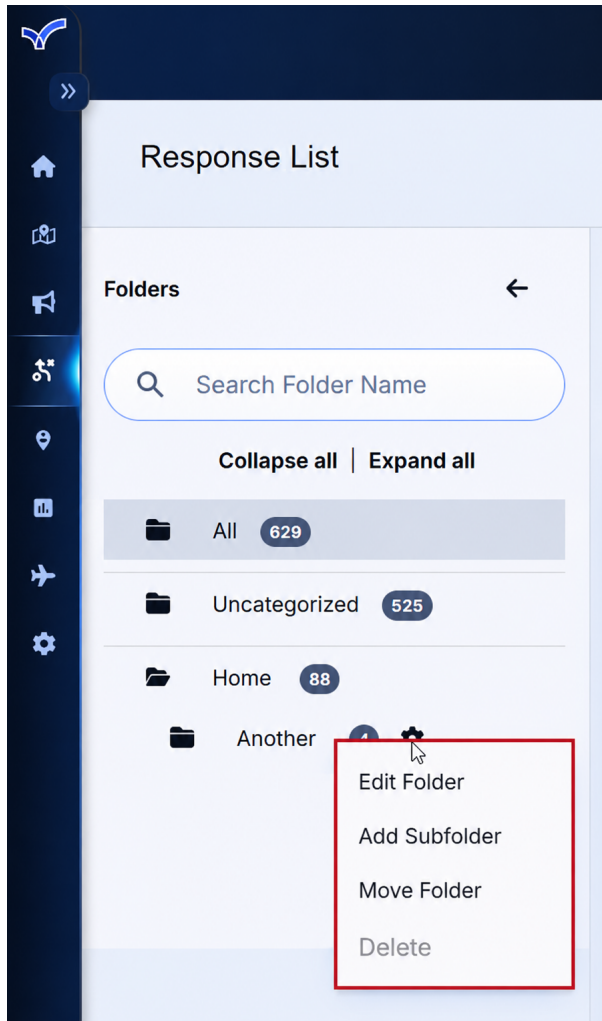
- **All** - Opens by default and contains any Responses launched from this Organization regardless of their Folder placement.
- **Uncategorized** - Contains any Responses that were launched without being placed in a designated Folder.

Click on a Folder in the **Folders** pane to the left to repopulate the table view with its contents.



## Modifying Folder Settings from the Response List

Custom Folders can be managed from the **Folders** pane by hovering the cursor over them and clicking the **Modifying Folder Settings** cog icon. Note that the default **All** and **Uncategorized** Folders aren't editable.



There are four actions that can be taken from here:

- **Edit Folder** - Allows users to edit the Folder Name and Role Permission Access.
  - **Folder Name** - Must be 200 characters or less.
  - **Permission to Access** - Specify which Roles can access the Folder. Note that Account and Organization Administrators will always have

access.

### Edit Folder Name/Permissions

**\* Folder Name**

Natural Disasters 17 / 200

**Permission to access** ⓘ

All Users  
This permission will also be applied to any subfolders

Selected Roles

Selected Roles (1)

Incident Operator ✕

Role Type Incident Operator Search role by name

Roles

Incident Operator

Cancel Save

- **Add Subfolder** - Create a child Subfolder for the parent-level Folder. Note that it will inherit the Role access permissions from the parent Folder, and that if the parent Folder is set to **All Users**, the child Subfolder can't be restricted by Role.

### Add New Folder

**\* Folder Name**

Natural Disasters - West
24 / 200

**Permission to access** ⓘ

All Users  
This permission will also be applied to any subfolders

Selected Roles

▼ Selected Roles (1)

Incident Administrator

Role Type Custom

🔍 Search role by name

Roles

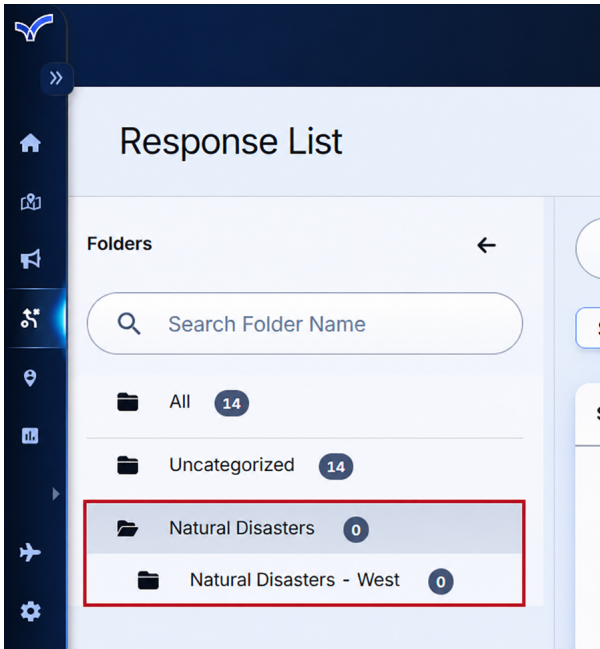
No records match the selected criteria

Cancel

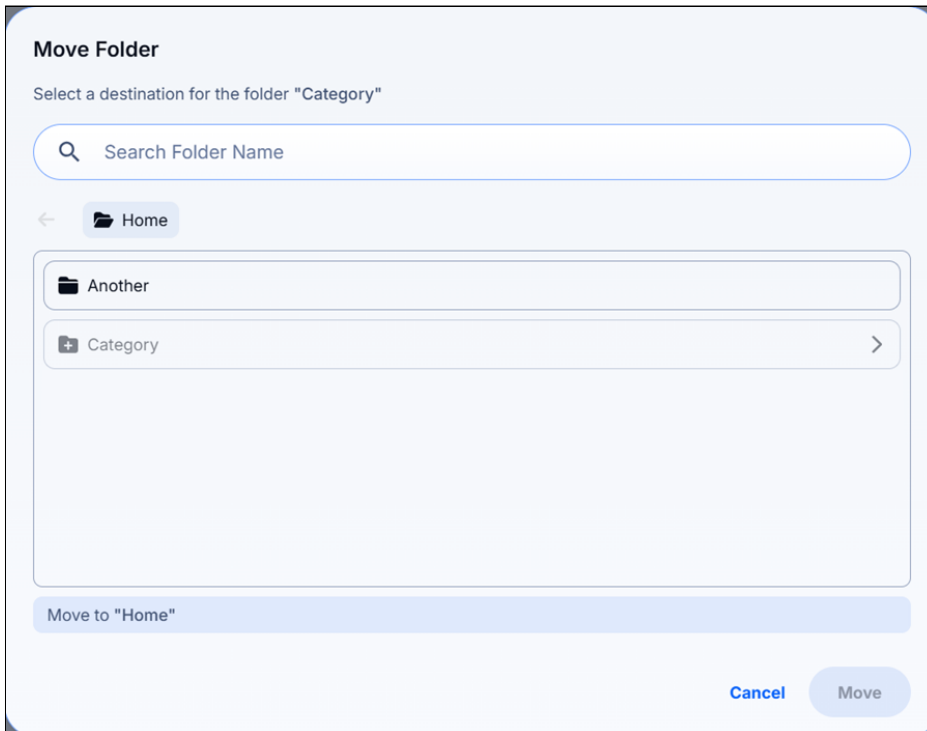
Save

Once saved, the new Subfolder can be found nested beneath its parent

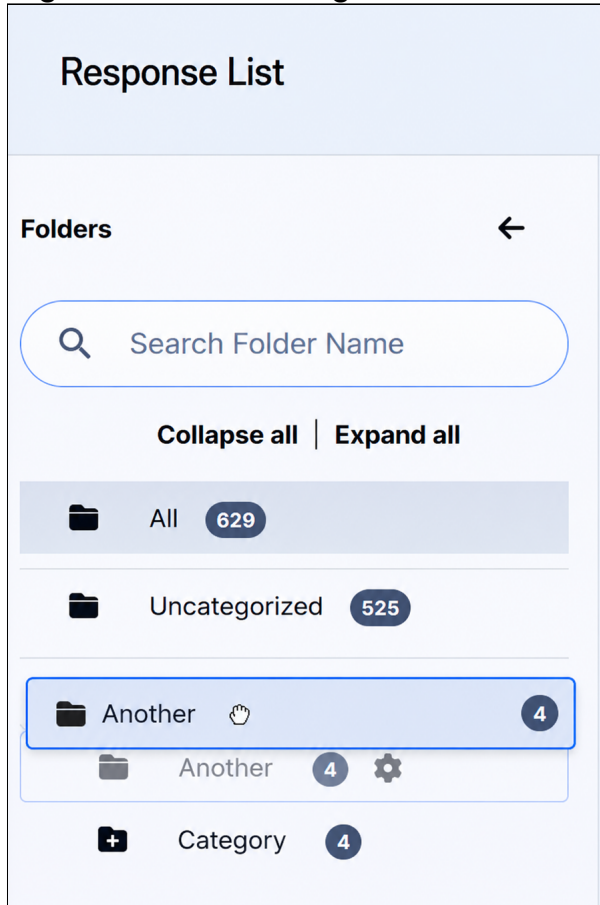
Folder.



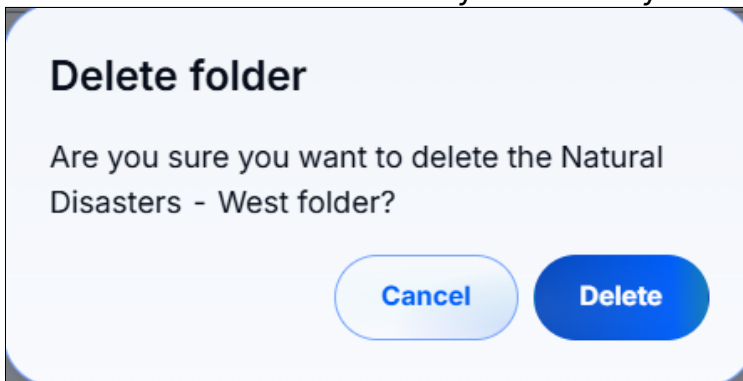
- **Move Folder** - Click to move the selected Folder to a different Folder or Subfolder.



- Folders can also be dragged and dropped into one another for easier organization and navigation.

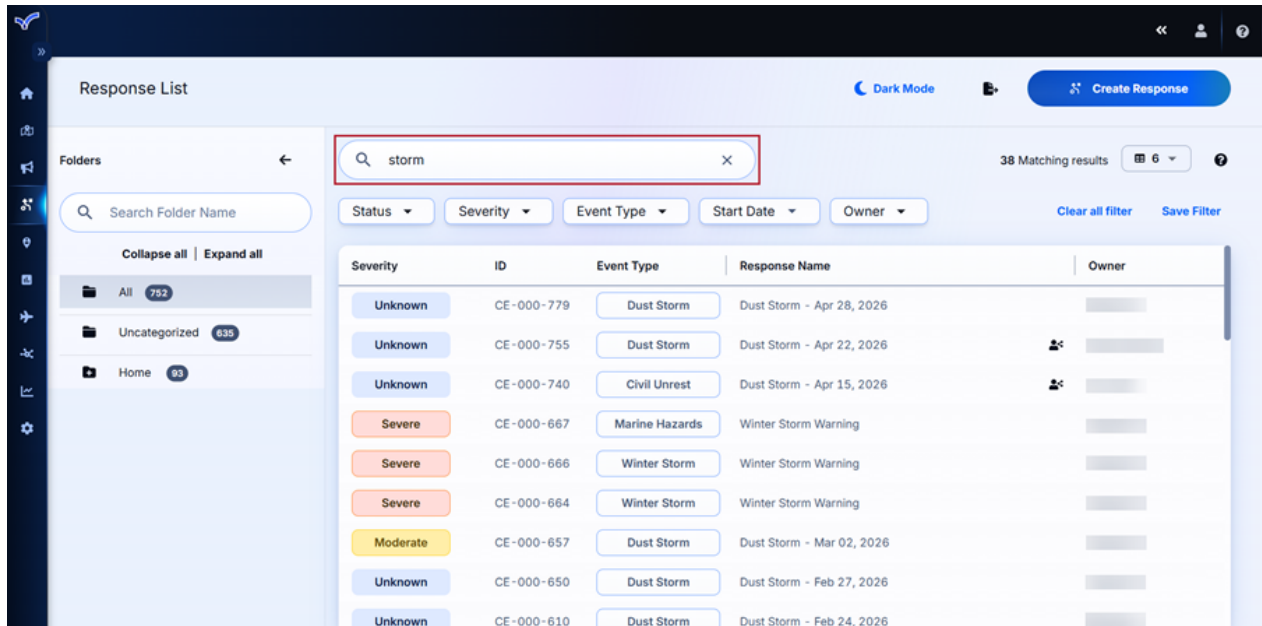


- **Delete** - Click to delete empty Folders or Subfolders. Note that parent-level Folders can't be deleted if they contain any Subfolders.



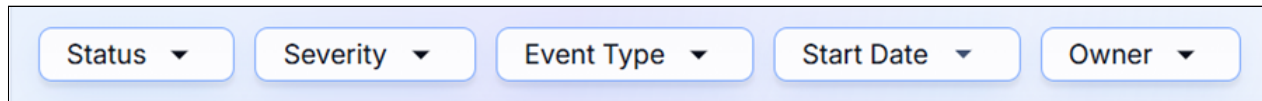
## Searching for Responses

Users can quickly locate Responses by using the **Search** bar to isolate items by the Response Name, Description, or Location.



## Filtering Responses

The Responses List can be filtered to provide a more granular view of the table, allowing users to surface Responses based on criteria most important to them.



Applied Filter configurations can be saved by clicking **Save Filter** or removed by clicking **Clear All Filters**.

The following filters are available:

- **Status** - Filter for either **Active** (default) or **Closed** Responses.
- **Severity** - Filter for Responses of a specific Severity or a combination of several Severities (Unknown, Minor, Moderate, Severe, Extreme).
- **Event Type** - Filter for Responses by Event Type(s).
- **Start Date** - Filter for Responses that were launched during a specific time period. It can be filtered by:
  - Past 7 Days
  - Past 14 Days
  - Past 21 Days
  - Past 30 Days
  - Custom Range
- **Owner** - Filter for Responses assigned to a specific user.

## Reviewing Linked Alerts

If any Alerts have been linked to a Response, the total count will show in the **Linked Alerts Column**, allowing operators to know at a glance if a Response has an associated Alert without needing to open the Response Details. This helps to quickly identify Responses with high Alert volume that may require immediate action.

Severity	ID	Event Type	Response Name	Linked Alerts
Unknown	CE-000-779	Dust Storm	Dust Storm - Apr 28, 2026	0
Unknown	CE-000-755	Dust Storm	Dust Storm - Apr 22, 2026	0
Unknown	CE-000-740	Civil Unrest	Dust Storm - Apr 15, 2026	0
Severe	CE-000-667	Marine Hazards	Winter Storm Warning	1
Severe	CE-000-666	Winter Storm	Winter Storm Warning	1
Severe	CE-000-664	Winter Storm	Winter Storm Warning	1
Moderate	CE-000-657	Dust Storm	Dust Storm - Mar 02, 2026	0
Unknown	CE-000-650	Dust Storm	Dust Storm - Feb 27, 2026	0
Unknown	CE-000-610	Dust Storm	Dust Storm - Feb 24, 2026	0

Click the Response and navigate to the **Alerts** tab on its **Response Details** page to review information about its associated Alerts. See [Alerts Tab](#) for more details.

**ACKNOWLEDGED ALERT**

Flood / Flood Illinois Minor

**Flood Warning**

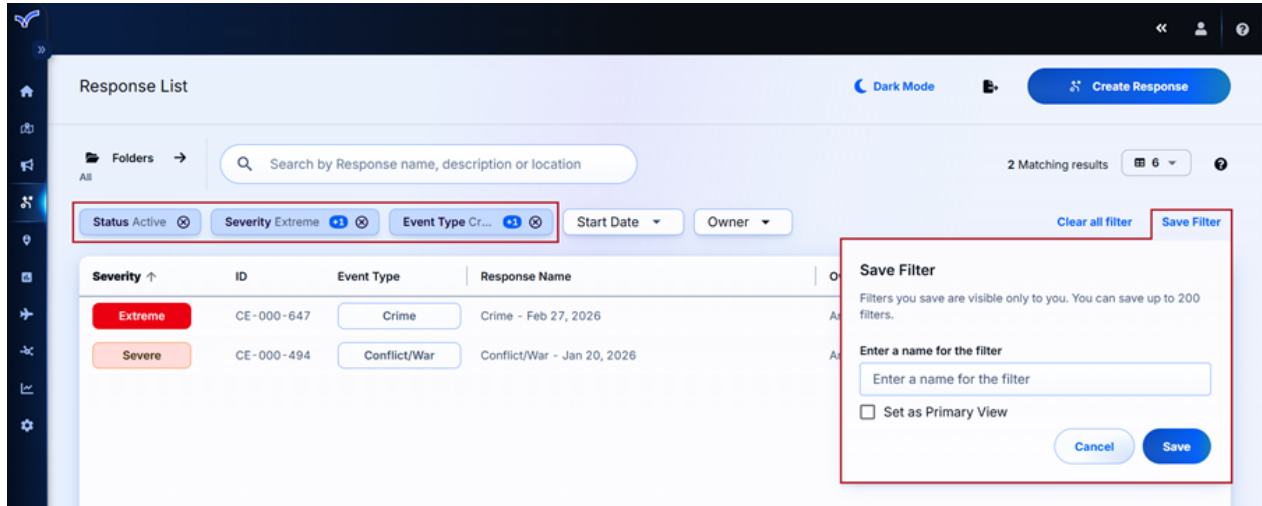
Event Start - 1mo ago  
4/7/2026, 11:00:00 AM

Event Last Updated - 7d ago  
5/5/2026, 12:29:19 AM

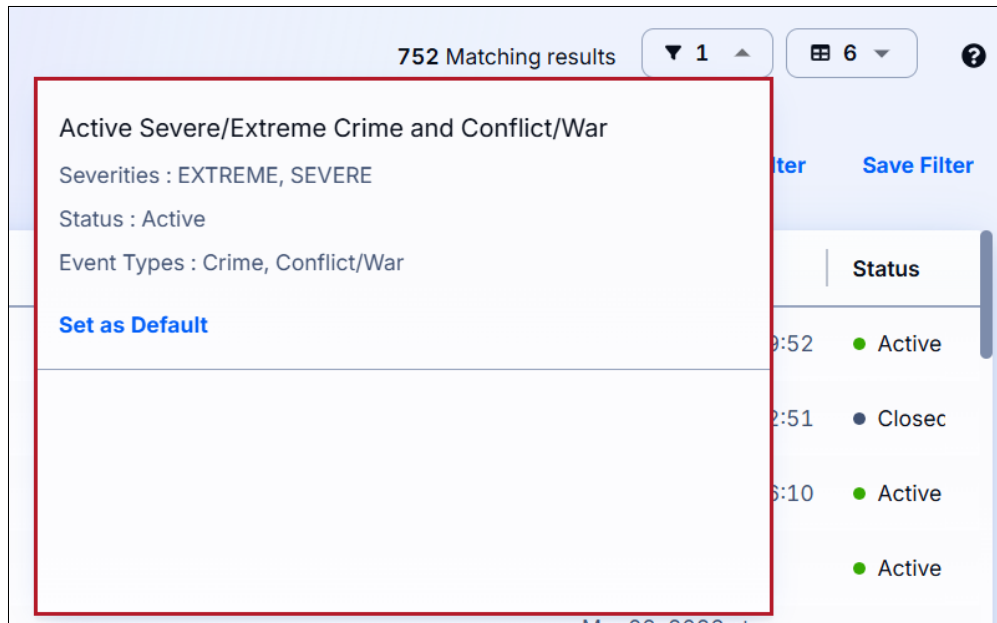
Event End - 7d ago  
5/5/2026 1:28:12 AM

## Saving Filters

Click **Save Filter** once one or more Filters have been applied to retain it as a reusable view, including setting it as the Primary View when accessing the Response List.



Saved Filters can be applied by clicking the **Filters** icon and selecting them from the list.

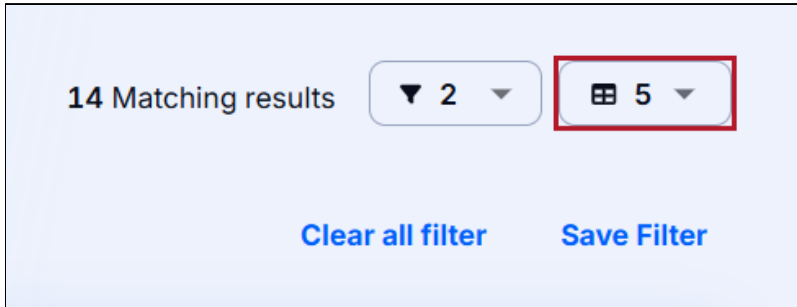


## Column Configuration

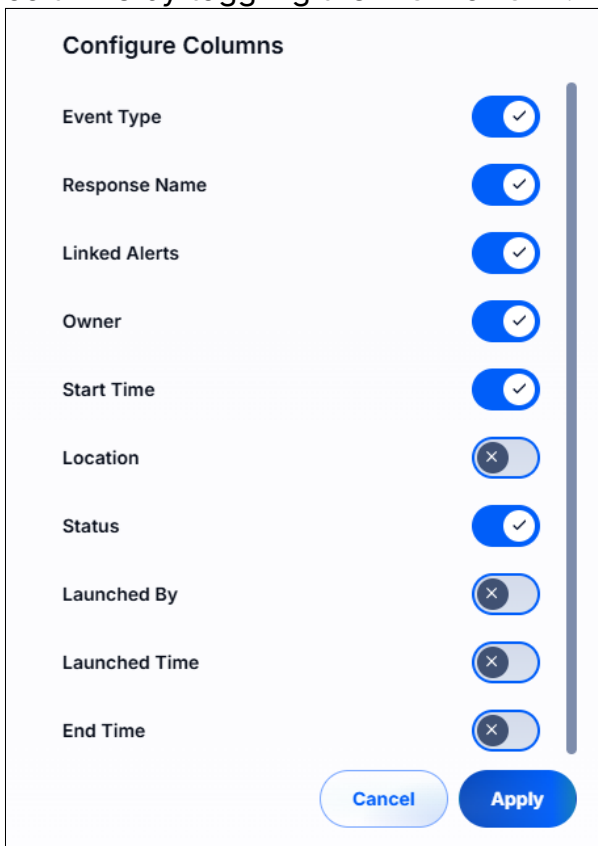
The columns in the table can be enabled or disabled to offer a more customized navigational experience, allowing users to display the data most important to them.

To manage the columns:

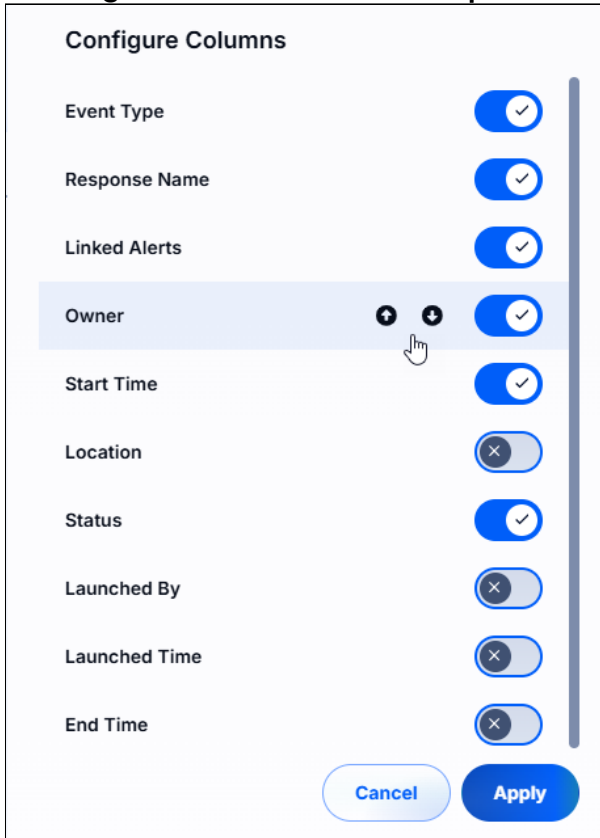
1. Click the **Columns** icon.



2. The **Configure Columns** modal will open. Enable or disable the desired columns by toggling them ON or OFF.



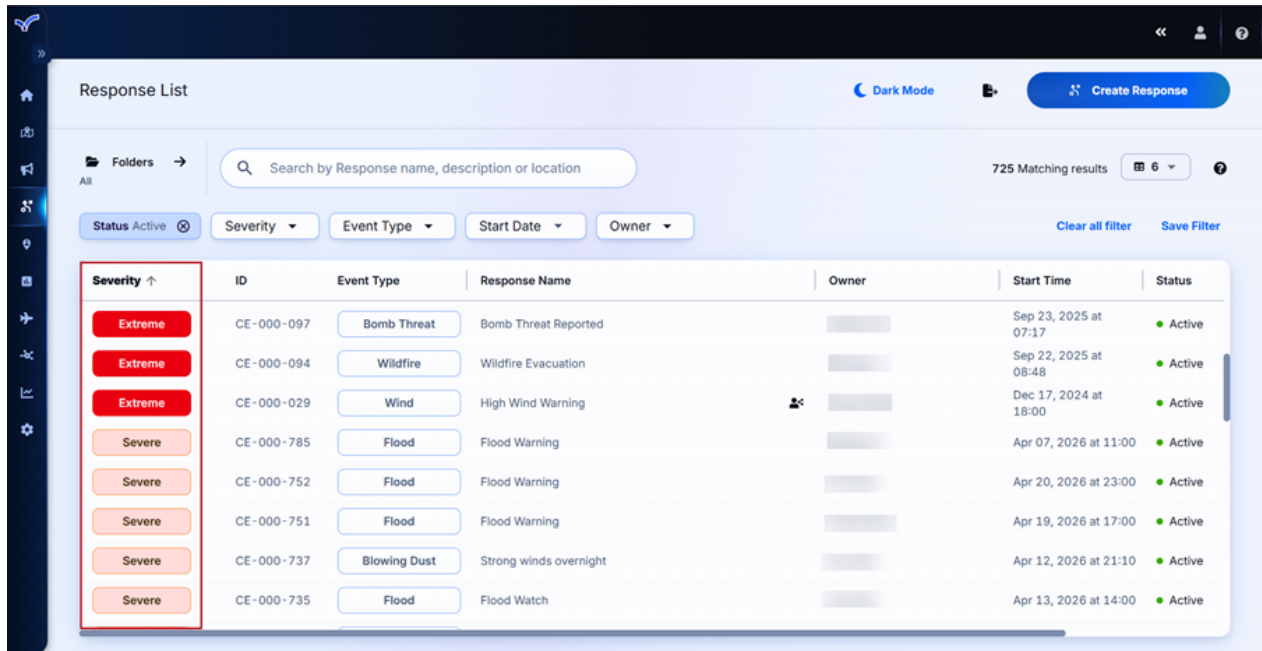
3. Rearrange the columns as needed by hovering the mouse over them and clicking either **Move Column Up** or **Move Column Down**.



4. Click **Apply**. The table will refresh and display only the enabled columns in the desired order.

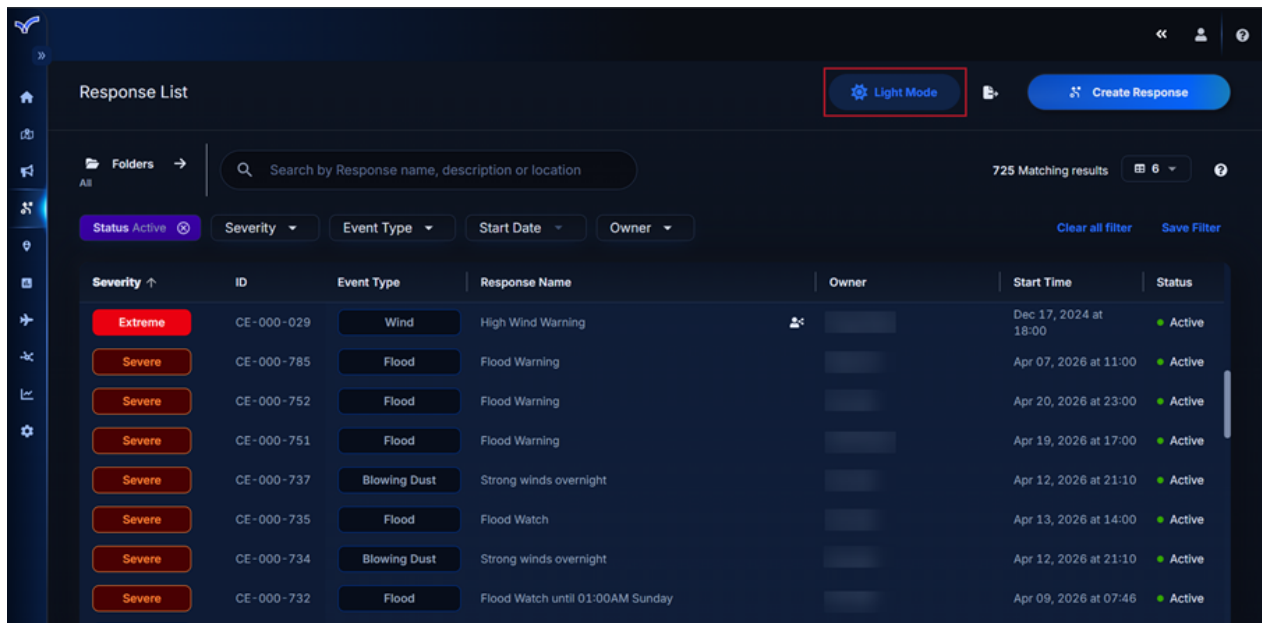
## Sorting by Column

Click a column header to sort its data from ascending to descending, or vice versa.



## Dark and Light Modes

Users can click the **Dark** or **Light Mode** toggle at the top of the page to switch the view mode from Light to Dark.



# Launching an Everbridge 360 Response

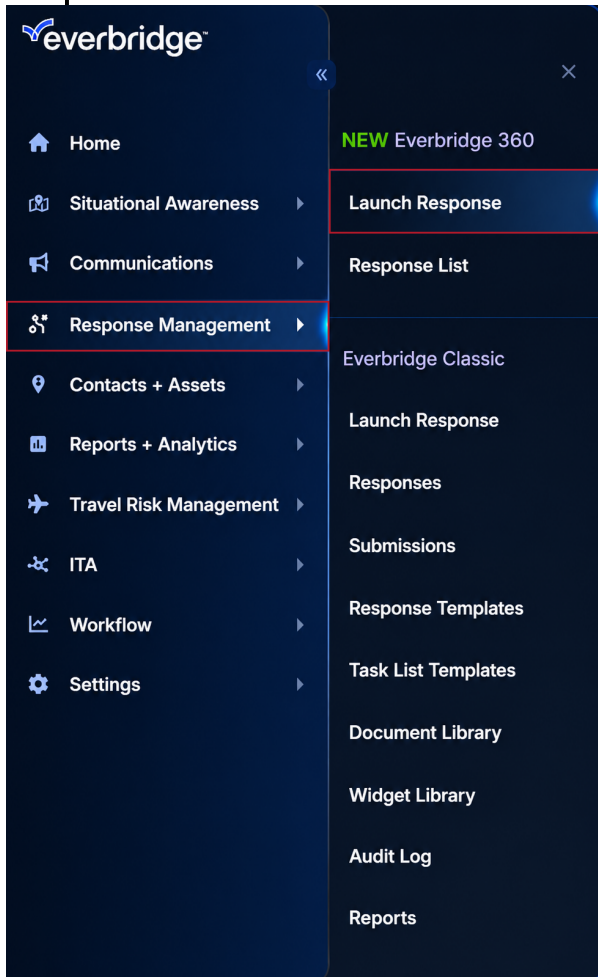
Users utilizing the Everbridge 360 interface have the ability to launch a Response using a 360-specific form consistent with other key modules, including Visual Command Center, Alert Management, and Communications.

**NOTE:** Users with either interface applied (Everbridge 360 or Everbridge Classic) can still access the **Classic Launch Response** button from the **Response Management** menu.

## Creating a Response from the Everbridge 360 Interface

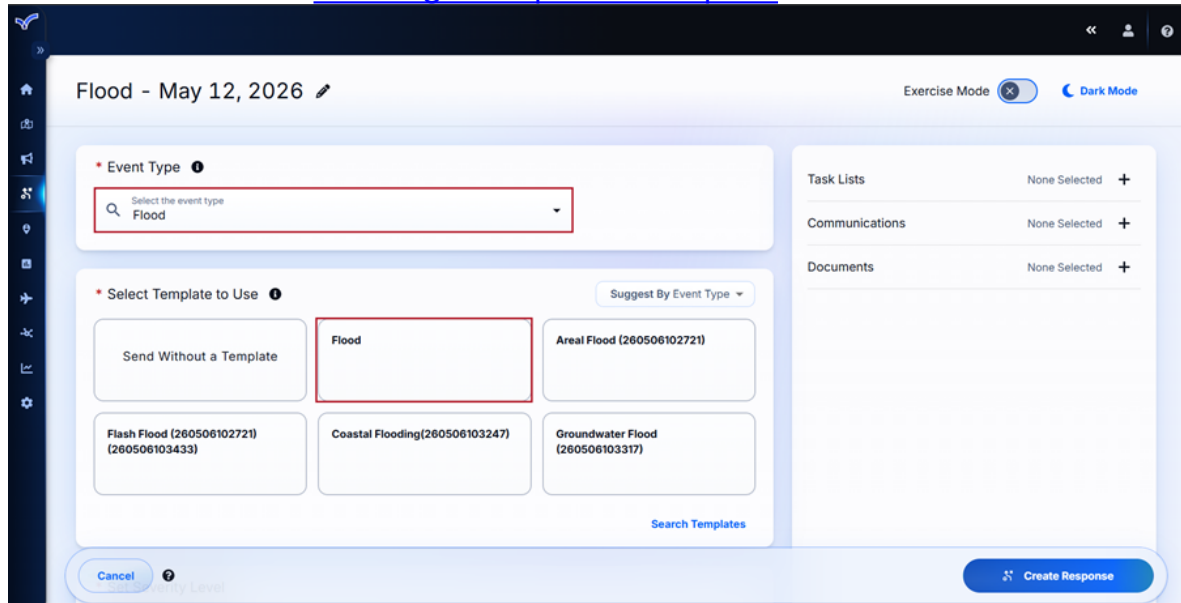
To create a Response via Everbridge 360:

1. Navigate to **Response Management > NEW Everbridge 360 > Launch Response**.

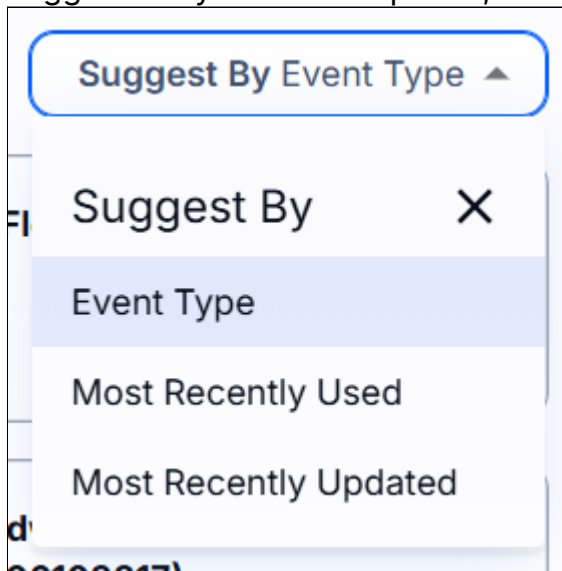


2. The **New Response** form opens. Select an appropriate **Event Type** from the dropdown menu, which will prefill the Response name while also being used for categorization and template recommendations. Note that a Response template must be associated with the selected Event Type for it to be

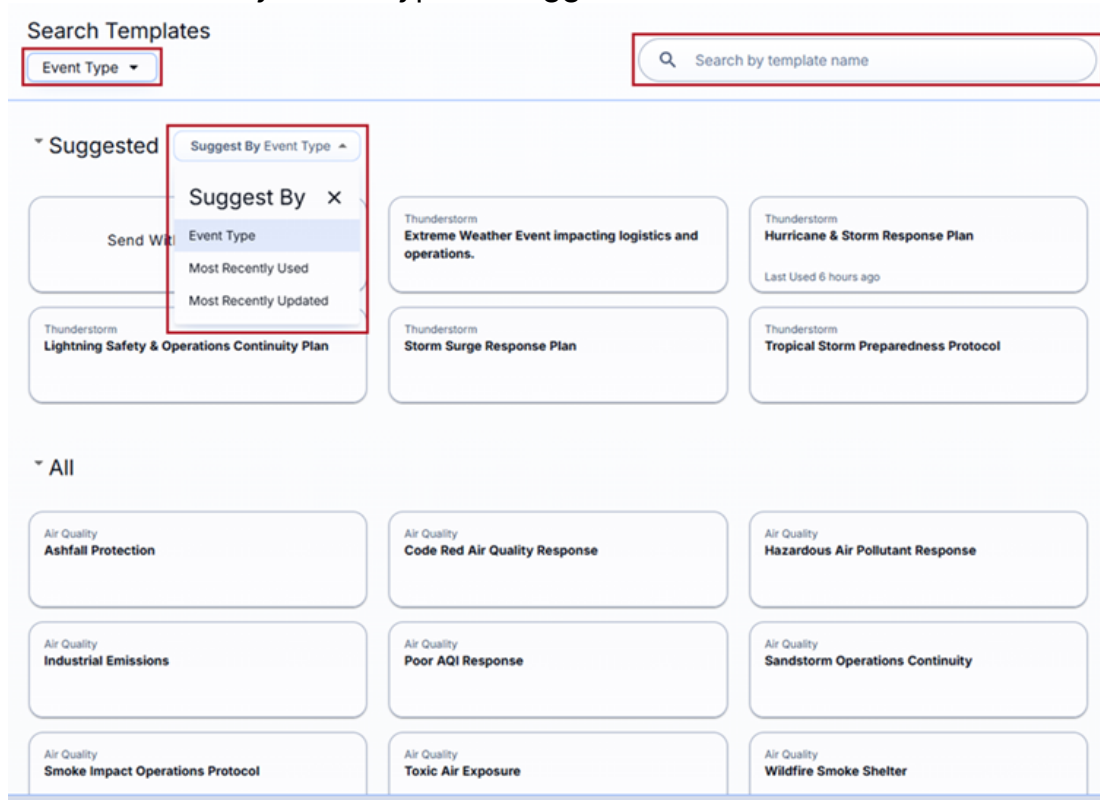
recommended. See [Creating a Response Template](#) for more details.



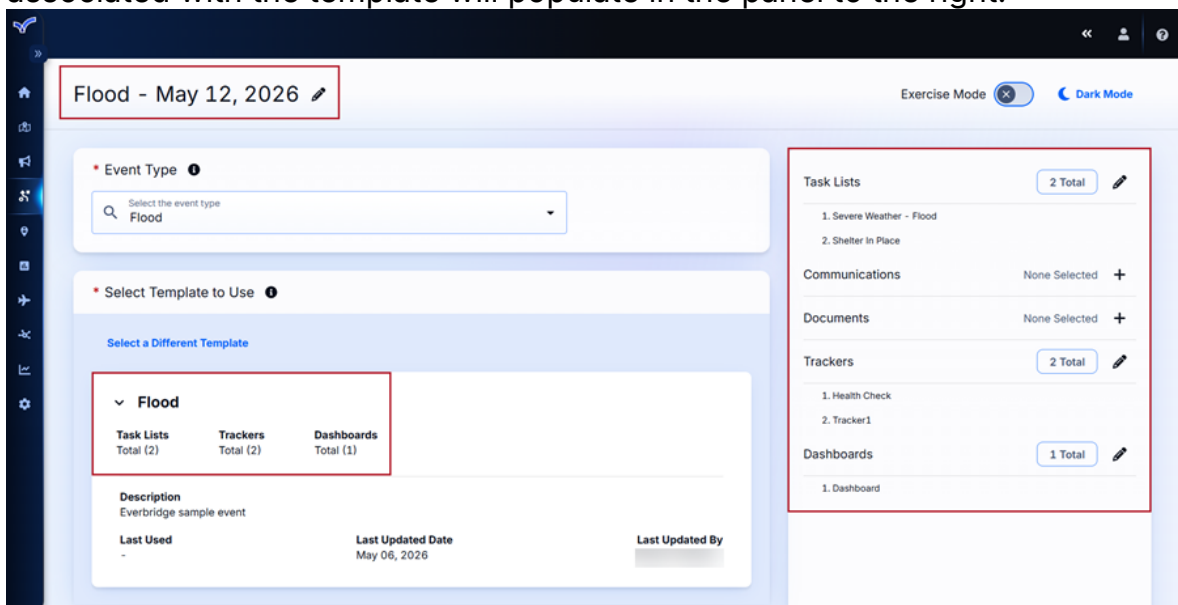
- **NOTE:** This dropdown menu displays the Everbridge 360 Event Types configured at **Settings > Organization > Everbridge 360 > Event Types**, not the Classic Response Types configured at **Settings > Organization > Response > Event Type**.
- The **Suggested By** can be changed from the default **Event Type** to **Most Recently Used** or **Most Recently Updated**, allowing templates to be suggested by those data points, instead.



- Users can also click **Search Templates** to search for specific template names or filter by Event Type or Suggestions.



3. Choose a template or select **Send Without a Template**. Note that selecting a template will update the Response name to whatever was specified in the Response Template, which can be edited again as needed. Once selected, any Task Lists, Communications, Documents, Trackers, and Dashboards associated with the template will populate in the panel to the right.



4. If the selected template includes any Custom Fields built off of Incident Variables, they'll be available to fill in under **Add Response Information**. The values entered here will later populate in the **Additional Response Details** section of the **Response Details** page.

▼ **Add Flooding Response Information**  
3 Custom Fields - The selected template includes custom fields that allow you to add additional information to the response.

● \* **1. Damages**

Enter text 0 / 260

● \* **2. Incident Date**

MM-DD-YY 📅

● \* **3. Status**

▼

5. Set the **Severity Level** from the following options, which are unified across the Response, Alert Management, and Visual Command Center interfaces:
- Unknown
  - Minor
  - Moderate
  - Severe
  - Extreme

\* Set Severity Level

Unknown

Minor

Moderate

Severe

Extreme

6. Assign an owner for the Response to serve as a point of contact. If nothing is selected, it will default to the currently-logged in user. This will later be displayed on the **Response Details** page for reference.

\* Assign Owner

🔍 Assign the owner of the Response  
 Sarah ▼

7. Proceed to the **Additional Response Details** section and complete the following:
- If a template was selected, then the **Description** field will be prefilled with its contents. If not, add a description of the Response up to 5000 characters long.

- Enter the location name in the field (up to 2500 characters) or click **Pick Location from Map**.
- Enter the Response date and time.
- Set the time zone for the Response.

- Optionally, select which Folder to sort the Response into, or leave it Uncategorized.

Additional Response Details

---

**Description**

Flooding has been reported in your area. Please seek shelter, or if needed, evacuate to higher ground and await further instruction.

132 / 5000

---

**Location** 🏠 9 👤 0

[✎ Edit Location](#)

Santa Monica, Venice Beach

26 / 2500

---

**Date & Time**

\* Start Time End Time

05-12-2026 14:42 📅

MM-DD-YYYY HH:MM 📅

\* Time Zone

Time Zone  
(GMT-07:00) Pacific Daylight Time (America/Los\_Angeles) ▼

---

\* Folder

Home ✕ ▼

---

[Cancel](#) ?

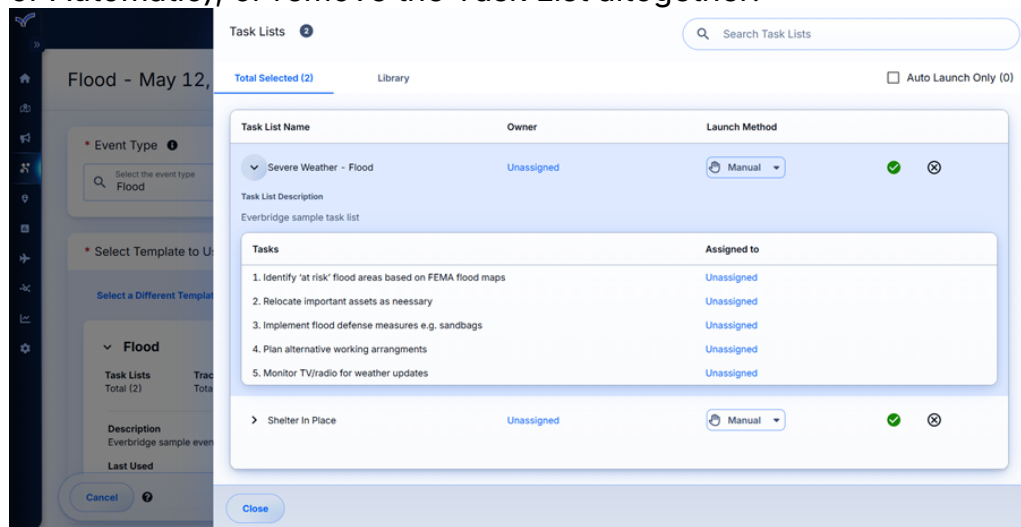
8. Task Lists, Communications, Documents, Trackers, and Dashboards can be selected or changed by clicking the pencil icons and selecting the desired items. Configure them to be launched automatically with the Response or manually after it's been launched. Note that if a template was selected at the beginning, any of its items will already appear in this panel and available to edit. For an in-depth overview of these items, see the [Response Management User Guide](#).

The screenshot displays a configuration panel with five sections, each with a header, a list of items, and a total count with an edit icon:

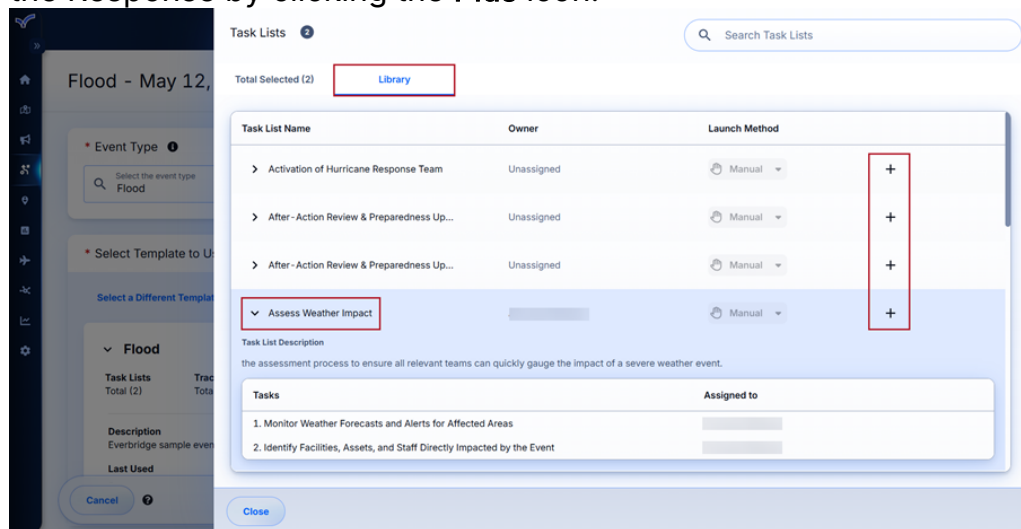
- Task Lists:** 2 Total. List includes: 1. Severe Weather - Flood, 2. Shelter In Place.
- Communications:** None Selected.
- Documents:** None Selected.
- Trackers:** 2 Total. List includes: 1. Health Check, 2. Tracker1.
- Dashboards:** 1 Total. List includes: 1. Dashboard.

- **Task Lists** - Search for pre-created Task Lists to attach to the Response or edit the Task Lists already associated with the selected template. Either:
  - Click the total number of Task Lists to open the **Total Selected** tab. Clicking the down arrow on a Task List will expand its Tasks and details, and clicking the down arrow on an individual Task will expand it further. From here, users can assign the Task List or individual Tasks to an Owner, change the Launch Method (Manual

or Automatic), or remove the Task List altogether.



- Click the **Pencil Icon** to open the **Library** tab, where more Task Lists can be expanded by clicking the down arrow and added to the Response by clicking the **Plus** icon.



- BCIC customers will see an additional **BCIC Task List** tab in this modal, allowing them to easily differentiate between Task Lists ingested from BCIC and those native to Everbridge. BCIC Task List descriptions include references to the plans, business entities, processes, locations, applications, resources, providers, and job titles that are associated with that Task List. See [here](#) for more

information on BCIC Task Lists.

Task Lists ? Search Task Lists

Total Selected (0) Library **BCIC Task List**

Task List Name	Owner	Launch Method	
> Activate Contingency Plans BCIC	Unassigned	Manual	+
> Activate Contingency Plans BCIC	Unassigned	Manual	+
> Active Threat Protocol	Unassigned	Manual	+
> JL Loss of Resources	Unassigned	Manual	+
> BCIC Loss of Resources	Unassigned	Manual	+
> Business Continuity Setup	Unassigned	Manual	+
> CM Task List For Testing	Unassigned	Manual	+
> CM Tasklist without description	Unassigned	Manual	+
> CM test Task List 2	Unassigned	Manual	+
> CM test Task List 2	Unassigned	Manual	+
> Earthquake CM Plan for Southern Califor...	Unassigned	Manual	+

Close

- Click on a Task List from the list view to expand its Description.

Task List Name: Loss of Facility | Owner: Unassigned | Launch Method: Manual

**Task List Description**  
 test description 1, test description 2, test description 4  
**Plan:** Finance and Accounting BC Plan  
**Process:** Billing, Accounts Receivable, Accounts Payable, Cash Management Service  
**Business Entity:** Accounting  
**Location:** \* Ironbrook Capital HQ  
**Resource:** Aluminum Sheets, Back up inventory of products sold  
**Application:** 3M Coder  
**Provider:** 3M Health Information Systems  
**Job Title:** Accountant, Budget Analyst

**Tasks** | Assigned to

No Tasks have been added in this Task List

- Communications** - Search for pre-created Communication or Incident templates (depending on the Organization's configuration) to use in this Response or choose to edit the one included in the chosen Response template. Either:
  - Click the total number of Communications to open the **Total Selected** tab. Click the **Preview** button to review the preselected Communication. The Communication's Launch Method (either

Manual or Auto) can be set here, or the Communication can be removed from the Response entirely, if needed.

- It's recommended to preview a template before using it to verify the contents and recipients so that they can be adjusted as needed.
- Click the **Pencil** Icon to open the **Library** tab, where more Communications can be previewed or added to the Response.

Communications 0 Search Communications

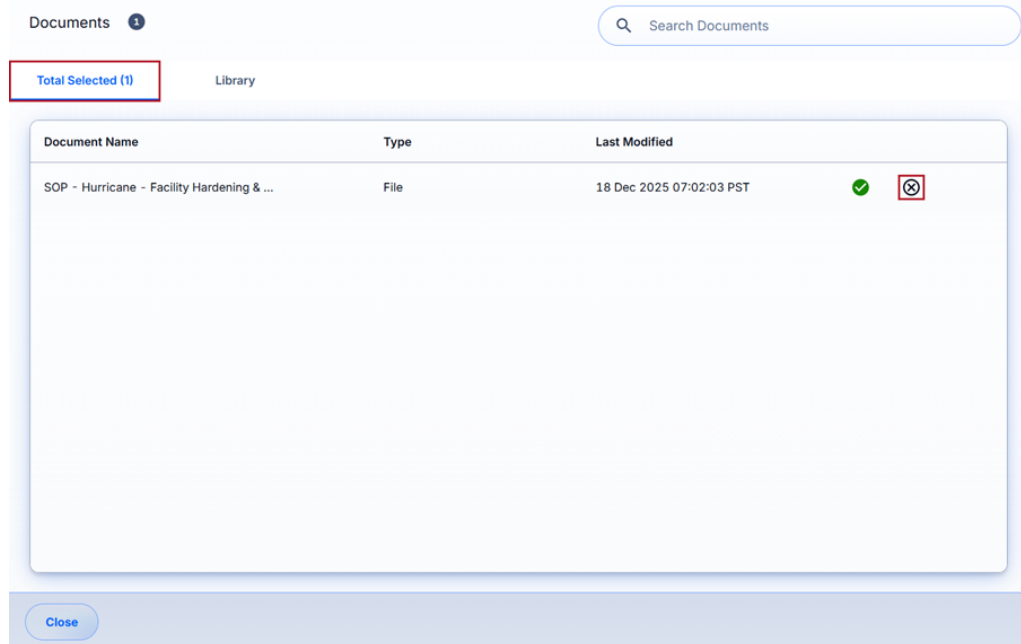
Total Selected (0) Library

Communication Name	Category	Launch Method	
Ad-Hoc Notification	No Category	Manual	+
Alert Notification to Impacted Travelers I...	VCC	Manual	+
Bomb Threat Overload	Safety	Manual	+
Critically Low Staffing at Terminal B	Staffing	Manual	+
Employee Wellness Check	VCC	Manual	+
Executive Safety Alert	Safety	Manual	+
Flood	Safety	Manual	+

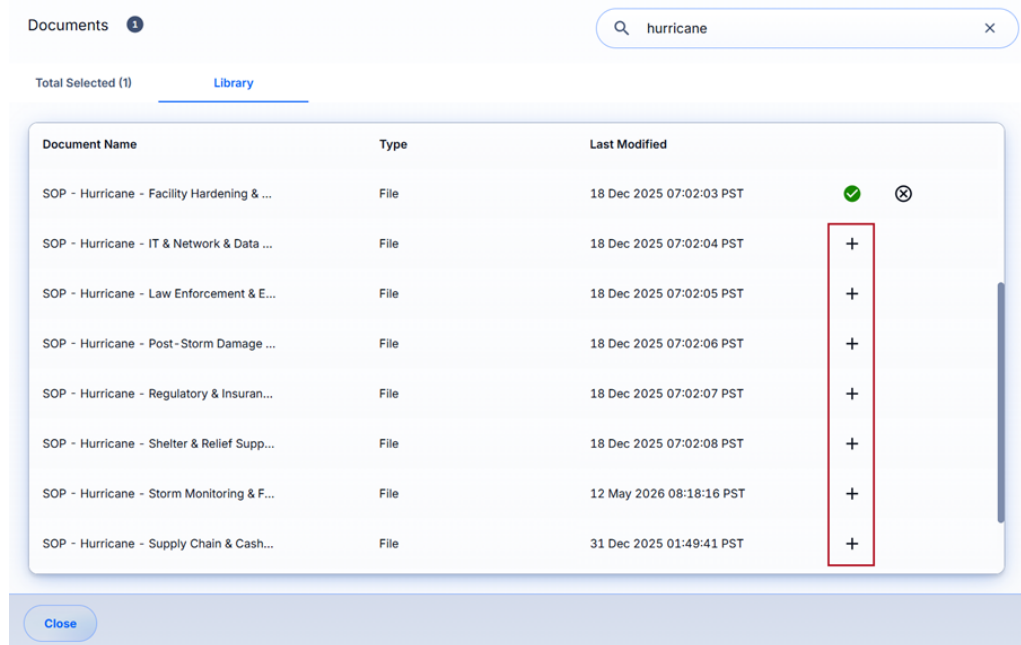
Close

- **Documents** - Search and attach any applicable Documents that have been uploaded to the Document Library, such as emergency plans or escape routes. Either:
  - Click the total number of Documents to open the **Total Selected** tab, where any Documents associated with the chosen template

will be displayed and available for removal, if needed.



- Click the **Pencil** Icon to open the **Library** tab, where more Documents can be searched for and added to the Response. Any attached Documents can be removed from here, as well.



- **Trackers** - Any Trackers included in the Response Template will be shown, and can be removed as needed.

Trackers 2

Tracker Name	Form Name		
Health Check	Response Health Form	✓	⊗
Location Updates	Location Status	✓	⊗

Close

- **Dashboards** - Any Dashboards included in the Response Template will be shown, and can be removed as needed. Click the down arrow to expand a Dashboard to see what widgets it contains.

Dashboards 1

Total Selected (1)

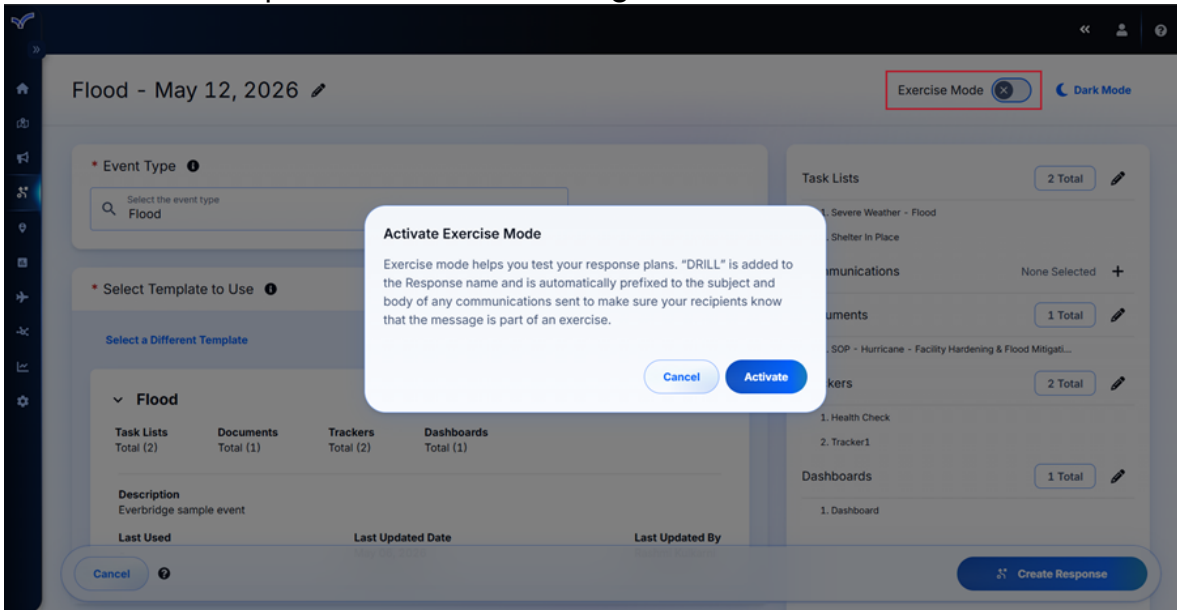
Dashboard Name	Count of Widgets		
<input checked="" type="checkbox"/> Dashboard	10	✓	⊗

Widget Name	Type of Widget
1. Meeting Minutes	Responses
2. Root Cause	Responses
3. Notes	Responses
4. Tasks Needing Attention	Responses
5. Dashboard Comments	Responses
6. Audit Logs	Responses

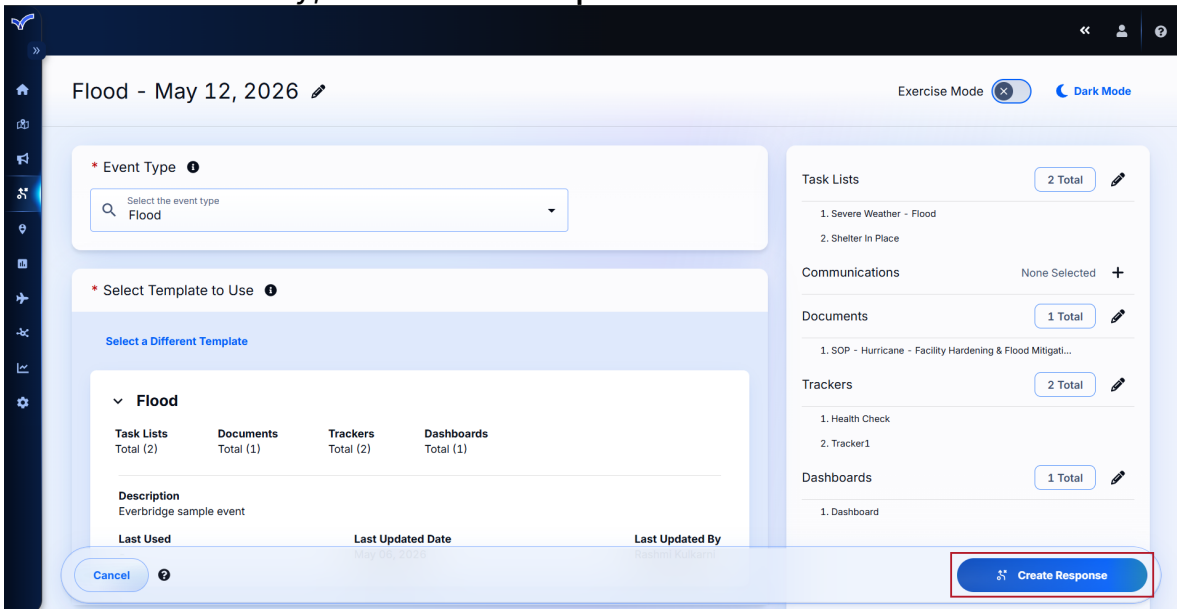
Close

9. If this Response is intended to be used for training purposes, click the **Exercise Mode** toggle in the top-right corner of the page. Doing so will add

“DRILL” to the Response name and automatically prefix it to the subject and body of any sent Communications, making it easy for recipients to know that it's not a real Response. Click **Activate** again on the modal to confirm.

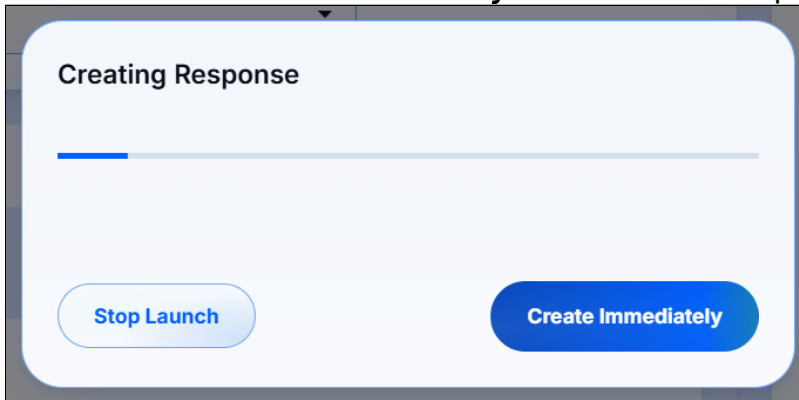


- Review the selections from the entire form and make any adjustments as needed. Once ready, click **Create Response**.



- The **Creating Response** modal will appear. If there are any last-minute changes to make, click **Stop Launch** to make them. If not, wait for the timer to

finish or click **Create Immediately** to create the Response.



12. After the launch, the sender will immediately be routed to the **Response Details** page for review and management. See [Viewing a Live Response](#) for more details about this page.

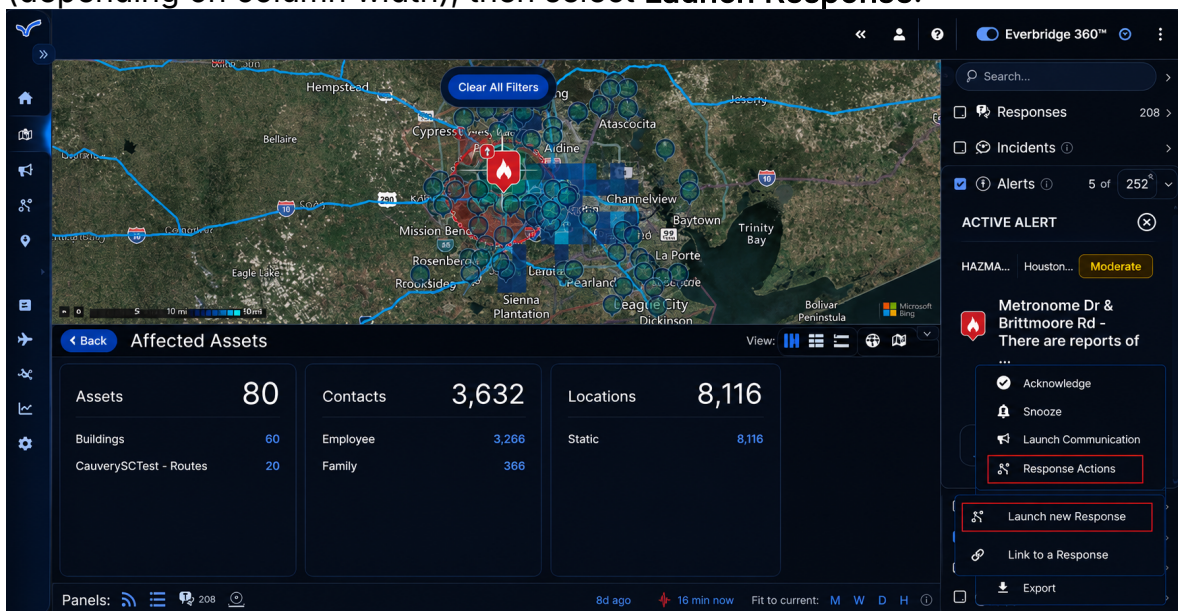
## Launching a Response from an Alert

Responses can be launched from an Alert, which will prefill its details with the Alert's information. This can be done in one of two ways: from within an Alert in **Visual Command Center (VCC)**, or from the **Alert Details** page in Alert Management.

### Launching from an Alert VCC

To launch a Response from an Alert in VCC:

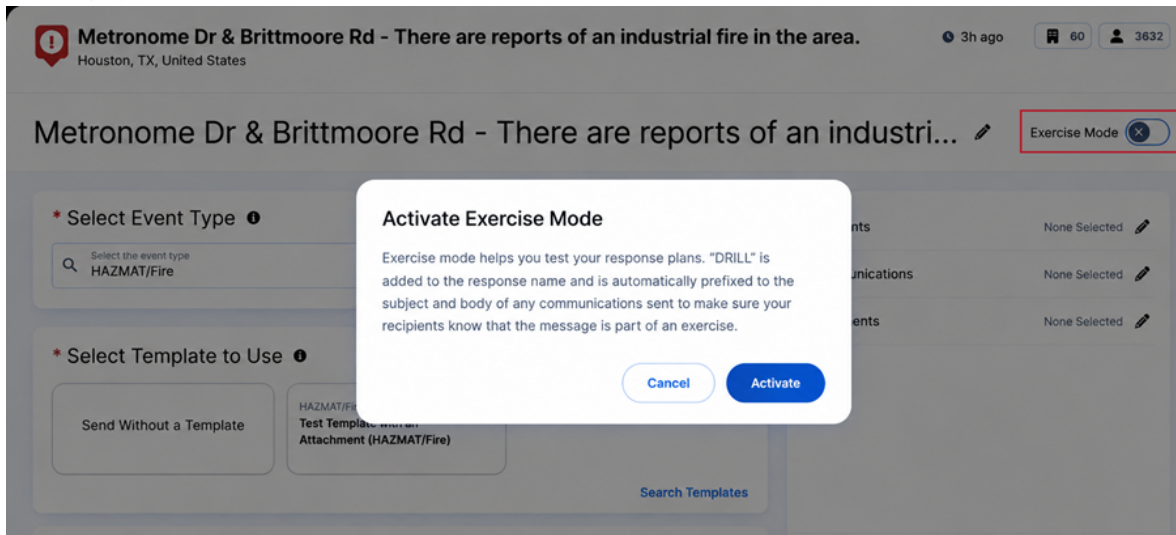
1. Locate the Alert in the **Alerts** panel and click it to open.
2. Once the Alert is open, click **Response Actions** from the action bar or menu (depending on column width), then select **Launch Response**.



3. The **Launch Response** form will open. Edit the fields and make the selections as described in the instructions above. The Alert's details already prefill, including:

- Event Type
- Template
- Severity Level
- Owner
- Description
- Location
- Response Date and Time
- Time Zone
- Folder

4. Depending on the selected Response Template, add any applicable Task Lists, Communications, Documents, Trackers, and Dashboards.
5. If this is intended to be a practice drill, click the **Exercise Mode** toggle, then **Activate**.

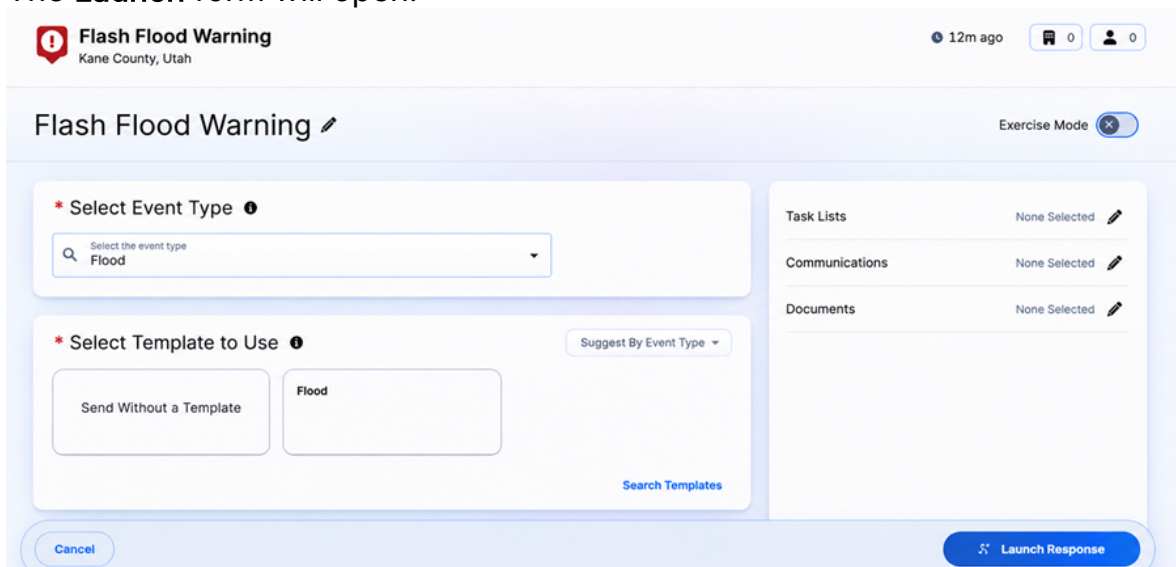


6. Click **Launch Response**.

## Launching from Alert Management

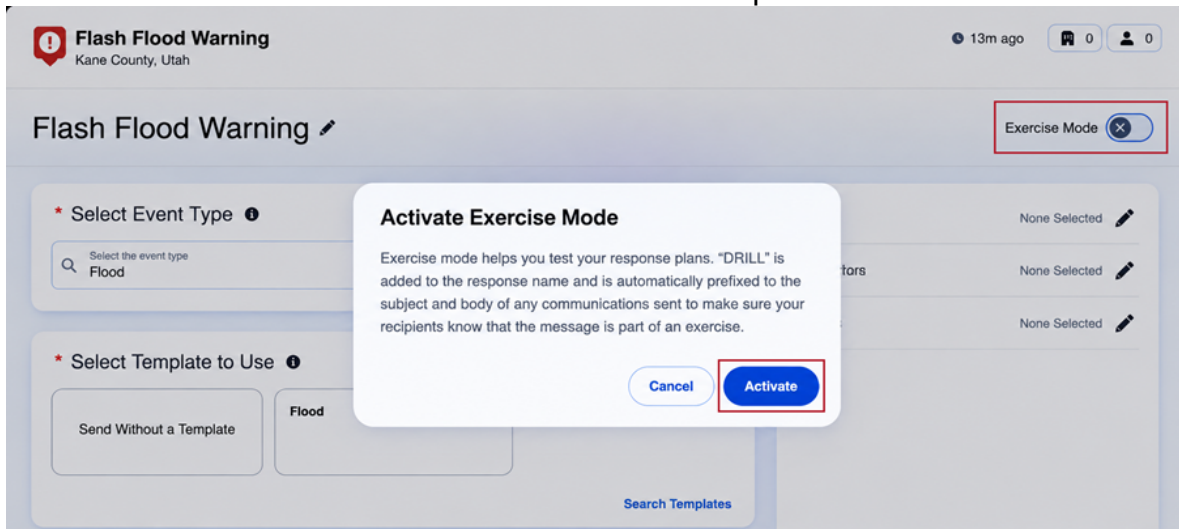
To launch a Response from Alert Management:

1. Navigate to **Situational Awareness > Alert Management**.
2. Select an Alert from the list to open the **Alert Details** modal.
3. Click **Response Actions > Launch Response** from the actions toolbar.
4. The **Launch** form will open.



5. Edit the fields and make the selections as described in the instructions above. The Alert's details are already prefilled, including:

- Event Type
  - Response Template
  - Severity Level
  - Owner
  - Description
  - Location
  - Response Date and Time
  - Time Zone
  - Folder
6. Depending on the selected Response Template, add any applicable Task Lists, Communications, Documents, Trackers, and Dashboards.
  7. Activate **Exercise Mode** if this is intended to be a practice drill.



8. Click **Launch Response**. The user will immediately be routed to the [Everbridge 360 Response Details](#) page, where they can monitor and manage its progress.

## Launching an Everbridge 360 Response from a Map Filter in VCC

Responses can be launched directly from a drawn Map Filter in Visual Command Center, making it easy to capture affected Assets or Contacts in a geographic area.

To do this:

1. In the Visual Command Center Operator Console, click the kebab menu icon in the top-right corner and select **Map Filter**.
2. Draw a Map Filter shape on the map.
3. Click the **Launch Response (Everbridge 360)** button on the **Actions** bar.



- The **New Response** form will open with the **Location** section prefilled with any Assets or Contacts captured in the drawn Map Filter.

- Complete the rest of the Response fields, then click **Launch Response**.

## Linking Alerts to Existing Responses

Alerts can be manually linked to existing Responses from the **Alert Management** page, which can be found by navigating to **Situational Awareness > Alert Management** in the Manager Portal.

Alerts that have been linked to a Response will show the **Response icon** in the Alert Management list view.

The screenshot shows the 'Alerts' management interface with 190 alerts. The table has columns for Severity, Source, Category, Description, Group, Owner, Started, Updated, Assets, People, and Status. Three alerts are visible:

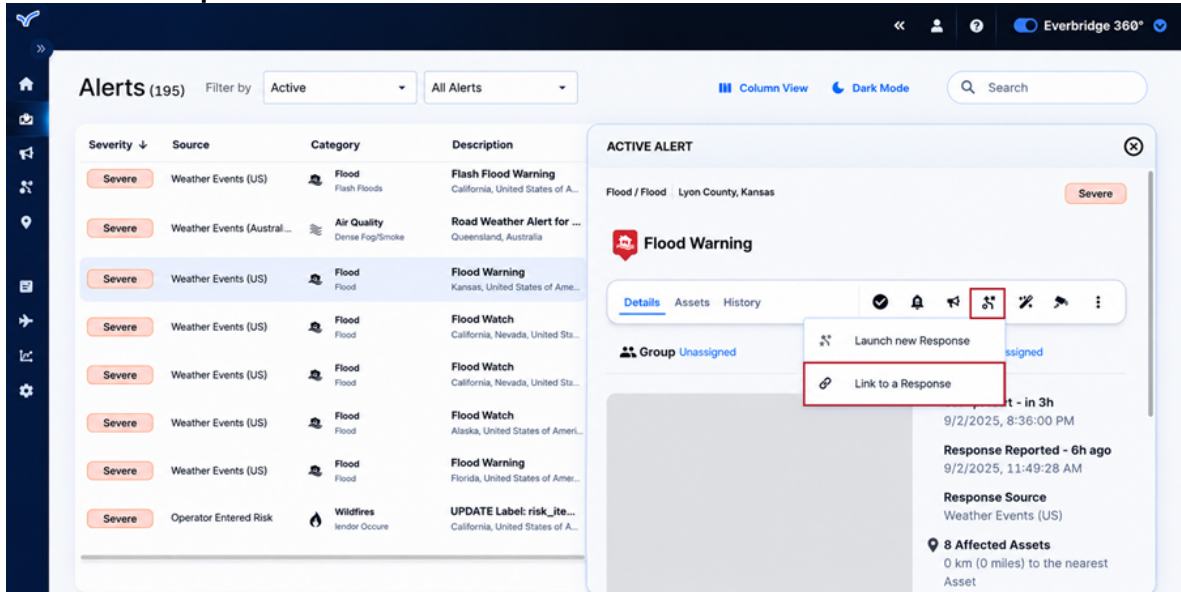
Severity	Source	Category	Description	Group	Owner	Started	Updated	Assets	People	Status
Severe	Weather Events (US)	Flood Flash Floods	Flash Flood Warning California, United States of A...			2h ago	53s ago	9 9	...	
Severe	Weather Events (US)	Flood Flood	Flood Warning Kansas, United States of Ame...			in 2h	12m ago	8 9	...	
Severe	Weather Events (US)	Thunderstorm Severe Thundersto...	Severe Thunderstorm ... Minnesota, South Dakota, Uni...			36m ago	14m ago	2 9	...	

**NOTE:** For more on Alert Management, see the [Visual Command Center User Guide](#) or Online Help.

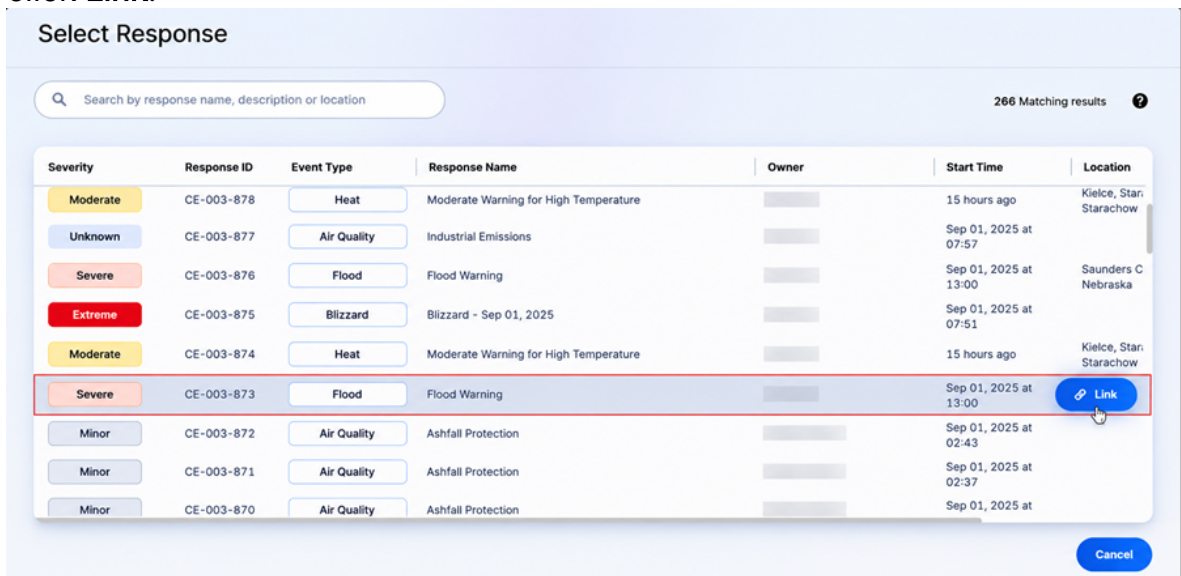
To link an Alert to a Response:

1. Navigate to **Situational Awareness > Alert Management**.
2. Click the Alert that needs to be linked.

- The **Alert Details** modal will open. Click the **Response Actions** icon and select **Link to a Response**.



- The **Select Response** modal will open. Either search for a Response by Response Name, Description or Location, or just scroll through the list and select the appropriate Response. Hover the cursor over the Response and click **Link**.



- The **Alert Details** modal will refresh, and the linked Response will now be displayed at the bottom. Clicking the link will open the **Response Details** page

for the linked Response.

**ACTIVE ALERT**
ⓧ

**📍 8 Affected Assets**  
0 km (0 miles) to the nearest Asset

**👤 0 Affected People**

**Description**  
The National Weather Service has issued a Flood Warning effective 2025-09-02T22:36:00-05:00 for Lyon, KS until 2025-09-03T23:48:00-05:00

**More Information**  
<https://alerts.weather.gov/search?id=urn:oid:2.49.0.1.840.0.43700d56194afb21a4ecbd90cdd79c0d6dbdde...>

**Segments**

▼ **Lyon, KS**  
Until 9/3/2025, 9:48:00 PM

**🔗 Linked to Response**  
[Flood Warning](#)

# Everbridge 360 Response Details

Click on a Response from the Responses List to open the **Response Details** page, which displays crucial information about a launched Response and allows the user to take further actions on it as needed.

The screenshot shows the 'Response Details' page for a 'Severe Thunderstorm Watch - California'. The page is updated on Tue, 26 Aug 2025 at 14:22. It features a navigation bar with tabs: Overview (selected), Dashboards, Alerts, Communications, Tasks, Impacts, Documents, Trackers, Form Reports, Situation Reports, Meeting, Root Cause, and Escalated Submission. The main content area includes:

- Task Lists:** 7 total tasks. Breakdown: In Progress (2), Not Started (1), Not Launched (4). A red bar indicates 'Requires Attention' (1) and a grey bar indicates 'Unassigned' (0).
- Communications:** 15 total. Breakdown: Not Launched (2), Closed (13). Yellow bars indicate 'Below 80% Confirmat...' (13) and 'Below 50% Confirmat...' (13).
- Trackers:** 4 total. Breakdown: Active (2), Not Launched (2), Closed (1). A red bar indicates '0% completion' (2).
- Description:** Primary concerns include power outages, flooding, structural damage to facilities, supply chain disruptions, and employee/customer safety risks. Immediate Actions Required: Facility securing and inventory protection protocols.
- Summary Metrics:** Assets (689), People (5274), Escalated Submissions (0), Alerts (2).
- Response Additional Details:** Includes a '+ Add Variables' button and a note to 'Select Variables From Available Properties'.
- Response General Information:** Time Zone (India Standard Time), Folder (Uncategorized), Launched Time (Jul 22, 2025 03:13 IST), Launched By, Response Last Modified By (1 second ago), Mode (Live), and Template (Hurricane & Storm Response...).
- Map:** A satellite map of California and surrounding regions (Washington, Oregon, Nevada, Utah, Colorado, Wyoming, Montana, Idaho) with a blue circle highlighting the response location.

The **Response Details** page is broken into multiple tabs or areas, allowing users to easily navigate to any items included in the Response:

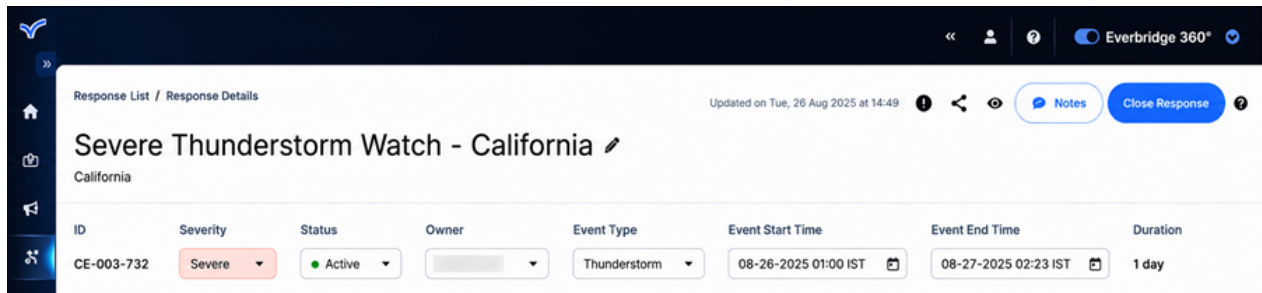
- Basic Response Details
- Overview (default tab)
- Dashboards

- Alerts
- Communications
- Tasks
- Impacts
- Documents
- Trackers
- Form Reports
- Situation Reports
- Meeting
- Root Cause
- Estimation

## Basic Response Details

The **Basic Response Details** is an omnipresent panel at the top of the page that displays editable information about the Response, including:

- Response Title
- Severity
- Status
- Owner
- Event Type
- Response Start Time
- Response End Time



Several actions can also be taken from the **Basic Response Details** panel, such as:

- Closing or Reopening the Response
- Using the Audit Log
- Publishing to Contacts/Previewing Contacts
- Reviewing or Leaving Notes

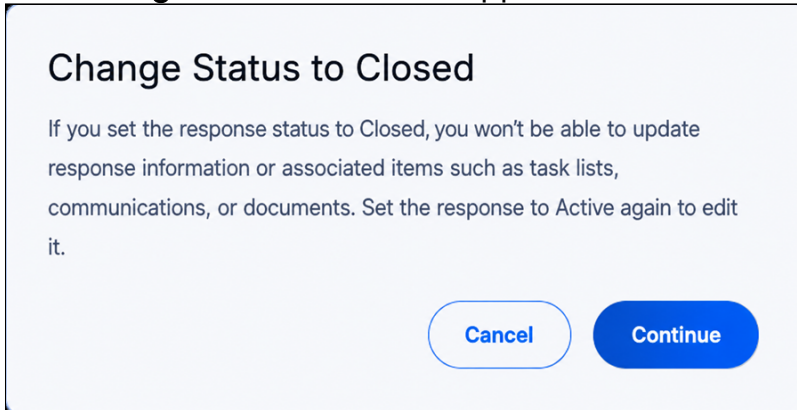
## Closing a Response

Active Responses can be closed directly from the **Response Details** page. Once a Response has been closed, no further changes can be made or actions taken on it.

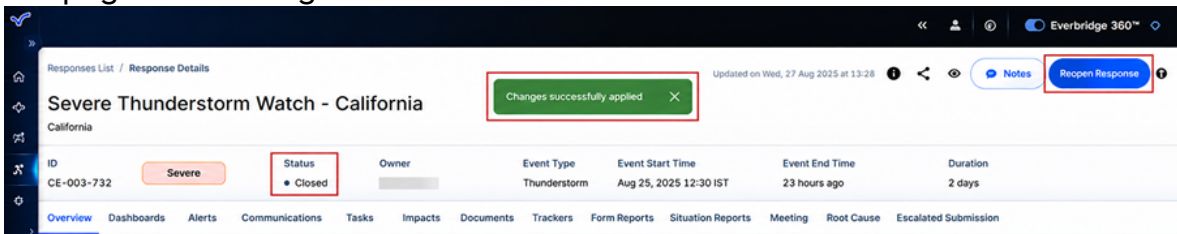
To close a Response:



1. Click **Close Response** in the top-right corner of the **Response Details** page.
2. The **Change Status** modal will appear. Click **Continue**.



3. A success message will appear at the top of the page, and the Response **Status** will now be set to **Closed** instead of **Active**. Note that the **Close Response** button has become the **Reopen Response** button, and the fields on the page are no longer editable.



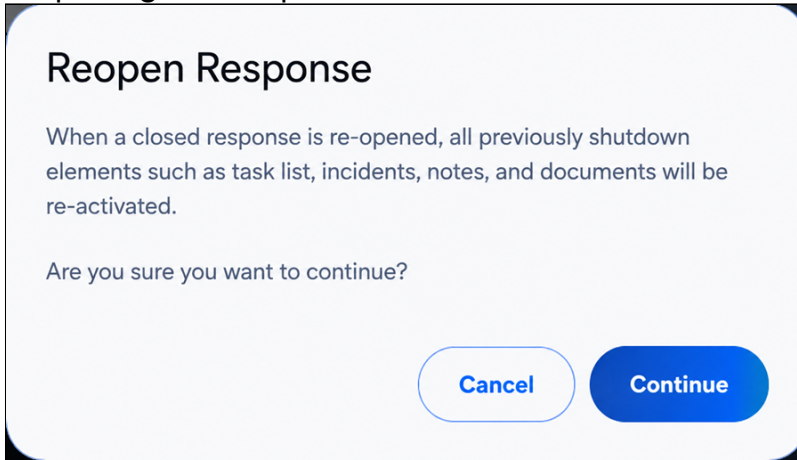
**NOTE:** Responses can also be closed or reopened with Quick Actions from the Response List. See

## Reopening a Response

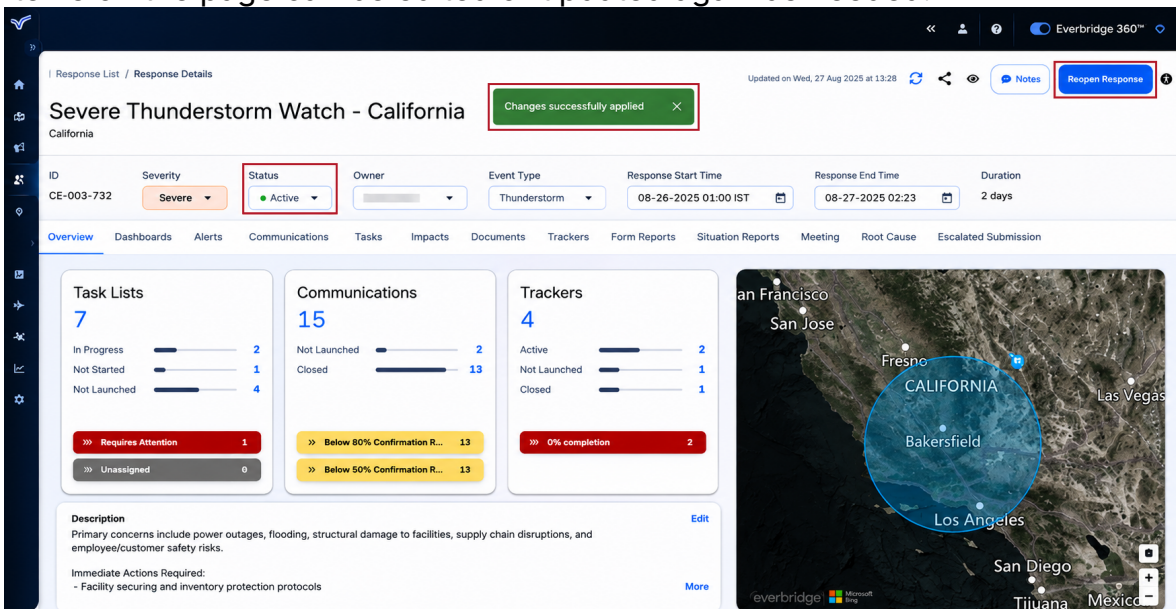
Closed Responses can be reopened as needed, which will allow operators to edit or take actions on it again. To reopen a Response:

1. Click **Reopen Response** on the **Response Details** page.

- The **Reopen Response** modal will open. Click **Continue** to proceed with reopening the Response.



- A success message will appear at the top of the page, and the Response **Status** will now be set to **Active** instead of **Closed**. Note that the **Reopen Response** button has reverted back to the **Close Response** button, and the items on the page can be edited or updated again as needed.



## Using the Audit Log

The **Audit Log** shows any **Action** that has been taken on a Response since being launched, such as adding comments, updating information, or closing the Response, including who took the action and when. Each individual change will create its own Action item for tracking.

Audit Log [Export](#)

Updated On ↓	Action	Details
Aug 26, 2025 17:23:17 CDT	Response Baseline Updated	changed the basic information of the Response "Severe Thunderstorm..." <a href="#">View Details</a>
Aug 26, 2025 17:22:07 CDT	Response Baseline Updated	changed the basic information of the Response "Severe Thunderstorm..." <a href="#">View Details</a>
Aug 26, 2025 17:21:52 CDT	Response Baseline Updated	changed the basic information of the Response "Severe Thunderstorm..." <a href="#">View Details</a>
Aug 26, 2025 17:21:38 CDT	Response Baseline Updated	changed the basic information of the Response "Severe Thunderstorm..." <a href="#">View Details</a>
Aug 26, 2025 17:21:22 CDT	Response Baseline Updated	changed the basic information of the Response "Severe Thunderstorm..." <a href="#">View Details</a>
Aug 26, 2025 17:20:42 CDT	Response Baseline Updated	changed the basic information of the Response "Severe Thunderstorm..." <a href="#">View Details</a>
Aug 26, 2025 17:20:11 CDT	Response Opened	opened the Response "Severe Thunderstorm Watch - California" <a href="#">View Details</a>
Aug 13, 2025 16:53:55 CDT	Response Closed	closed the Response "Severe Thunderstorm Watch - California" <a href="#">View Details</a>

[Close](#)

Clicking **View Details** for a taken Action expands its details and provides a side-by-side comparison of the content before and after the change.

**Audit Log**
Export

Updated On ↓	Action	Details
Aug 26, 2025 17:22:17 EDT	Response Baseline Updated	<div style="background-color: #ccc; width: 20px; height: 10px; display: inline-block; margin-right: 5px;"></div> changed the basic information of the Response "Severe Thunderstorm... <a href="#" style="font-size: 0.8em; color: #0070c0;">View Details</a>

The Current Version

Previous Version

<b>Title</b>	Severe Thunderstorm Watch - California	Severe Thunderstorm Watch - California
<b>Description</b>	Primary concerns include power outages, flooding, structural damage to facilities, supply chain disruptions, and employee/customer safety risks. Immediate Actions Required: - Facility securing and inventory protection protocols - Staff scheduling adjustments and safety briefings - Customer communication and service modifications - Supply chain coordination with vendors/distributors - Emergency supply stockpiling (generators, water, first aid)	Primary concerns include power outages, flooding, structural damage to facilities, supply chain disruptions, and employee/customer safety risks. Immediate Actions Required: - Facility securing and inventory protection protocols - Staff scheduling adjustments and safety briefings - Customer communication and service modifications - Supply chain coordination with vendors/distributors - Emergency supply stockpiling (generators, water, first aid)
<b>Event Type</b>	Thunderstorm	Thunderstorm
<b>Owner</b>	<div style="background-color: #ccc; width: 20px; height: 10px; display: inline-block;"></div>	<div style="background-color: #ccc; width: 20px; height: 10px; display: inline-block;"></div>
<b>Location</b>		
<b>Location Name</b>	California	California
<b>Response Start Time</b>	Aug 25, 2025 15:30:00 EDT	Aug 25, 2025 15:30:00 EDT
<b>Response Close Time</b>	Aug 26, 2025 16:53:55 EDT	Sep 26, 2025 16:53:55 EDT
<b>Task and Dashboard Alerts</b>	On	On
<b>Severity</b>	SEVERE	SEVERE

Click the **Export** button in the top-right corner to have the Audit Log exported via an emailed download link, then click **Send** to confirm.

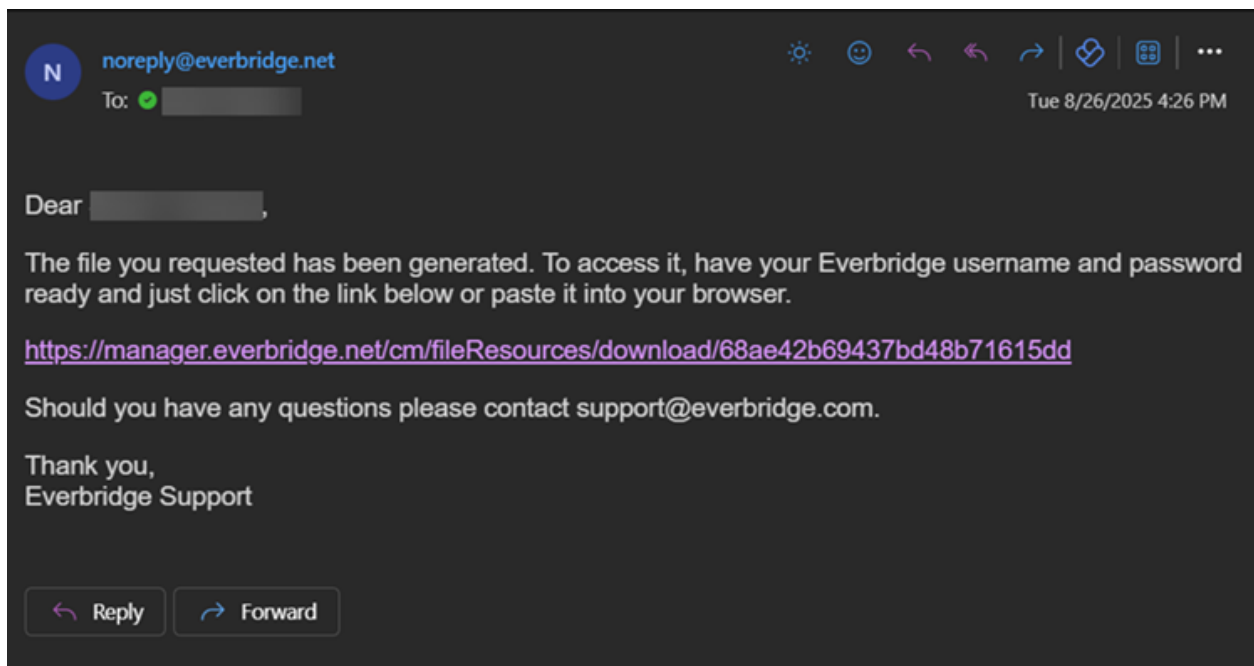
**Export Audit Log**
✕

Due to the large amount of data in this file, it may take longer than usual to download. We will generate the file for you in the background, so you can continue working and will send you an email when it's done.

Cancel
Send

Once generated, the email will arrive in the user's inbox, where they can click the link to download the Audit Log.

56



## Publishing to Contacts

Responses can be published directly to an Organization's Member Portal. To do this:

1. Click the **Publish to Contacts** button at the top of the page.

2. Choose the desired recipients individually or via Groups and Rules.

**Publish Response to Contacts**  
 The members you select will be notified that there is a new response they can view in the Member Portal.

🔍 Search by individual, group or rule name or by group description Advanced

	Groups	Individuals	Rules
<input type="checkbox"/>	Aaron		eb1-528-1868
<input checked="" type="checkbox"/>	Aaron		eb1-575-5559
<input checked="" type="checkbox"/>	Aaron		eb1-575-5584
<input checked="" type="checkbox"/>	Aaron		eb1-575-6942
<input type="checkbox"/>	Aaron		eb1-607-1045
<input type="checkbox"/>	Aaron		eb1-611-3014
<input checked="" type="checkbox"/>	Aaron		eb1-611-3024
<input checked="" type="checkbox"/>	Aaron		eb1-982-1144

**Selected Recipients** 👤 115569

Individuals Details

👤 6

Groups 8 Details

👤 77

Rules 2 Details

👤 115520

Cancel
Publish

- Optionally, click **Advanced** to open the **Advanced Search**, which allows users to search for Contacts using specific data points: External ID, Country, Associated Groups, Email Address, Additional Information,

### Location, and Record Type.

**Publish Response to Contacts**  
The members you select will be notified that there is a new response they can view in the Member Portal

← Back  Advanced

**Advanced Search**

**Refine By** Clear

External ID

Country ▼

Associated Group(s)

Email Address

Additional Information ▼

Location ▼

Record Type ▼

**Search Results (200+)** Select All

	First Name	Last Name	External ID
+	Luca		234578
+	Aria		234577
+	Caleb		234576
+	Isla		234575
+	Leo		234574
+	Mia		234573
+	Elijah		234572
+	Carmen		234571
+	Derek		234570
+	Sofia		234569

Cancel Publish

- The total number of **Selected Recipients** across all three selection methods will be displayed at the bottom, which should be reviewed before publishing to ensure accuracy. Click the **Selected Recipients** total to open the **Recipient Details** modal, which will allow the launcher to see the selected recipients by Individuals, Groups or Rules. Click **Done** to close it.

**Filter** Clear All

- All 115569
- Groups 77
- Individuals 6
- Rules 115520

**Recipient Details** 115569

Viewing All

First Name ^	Last Name	External ID	
Aaron	Hunley	eb1-224-3703	⊗
Aaron	Nowicki	eb1-224-4968	⊗
Aaron	Lyles	eb1-235-7118	⊗
Aaron	Gilbertson	eb1-214-400	⊗
Aaron	Hughs	eb1-216-1250	⊗
Aaron	Mounts	eb1-207-3933	⊗
Aaron	Ransom	eb1-220-3067	⊗
Aaron	Loper	eb1-237-6946	⊗
Aaron	Leonardo	eb1-224-3519	⊗

Done

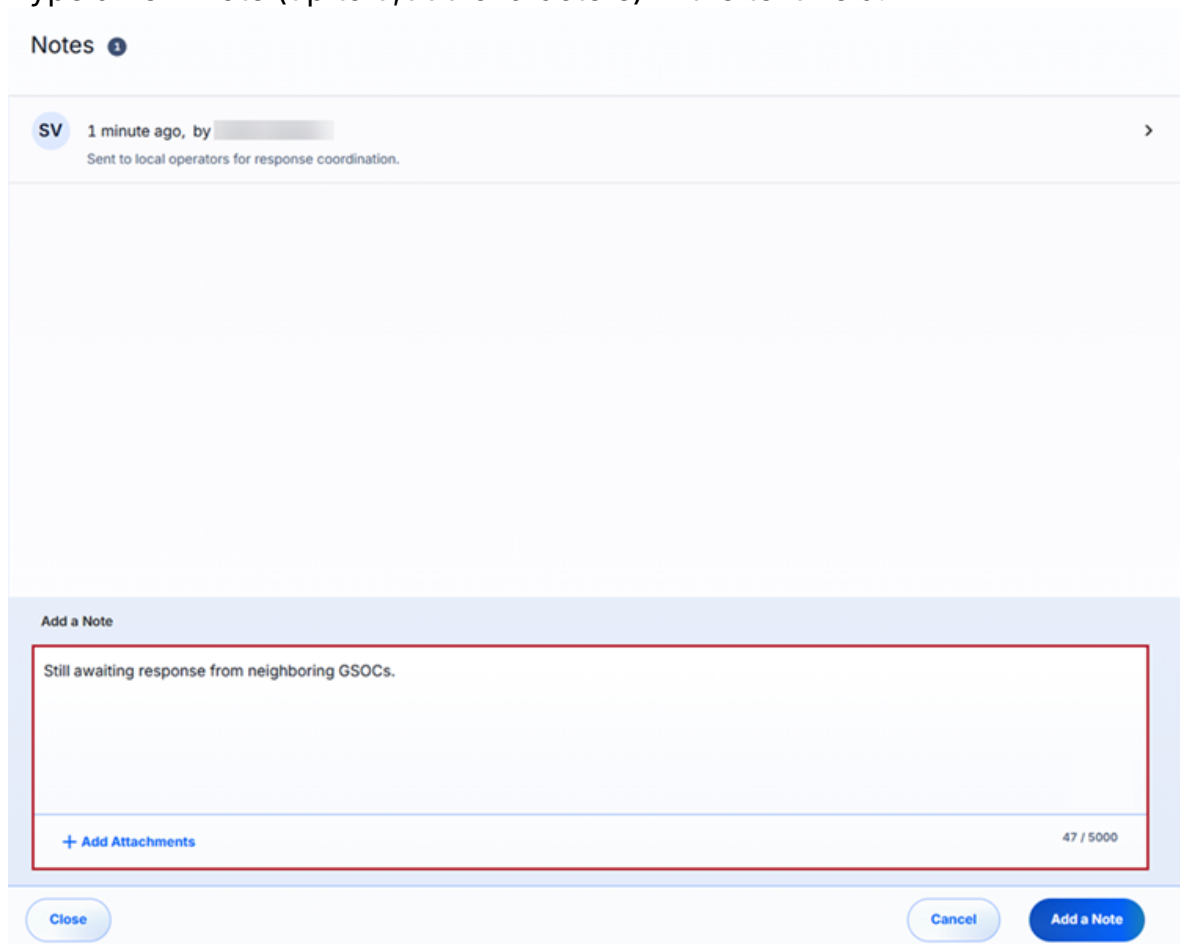
4. Click **Publish**. The chosen recipients will be notified that there's a new Response ready for review in their Member Portal
  - If needed, the Response can be removed from the Member Portal at any time by clicking **Unpublish** from the **Basic Response Details** panel.

## Using Notes

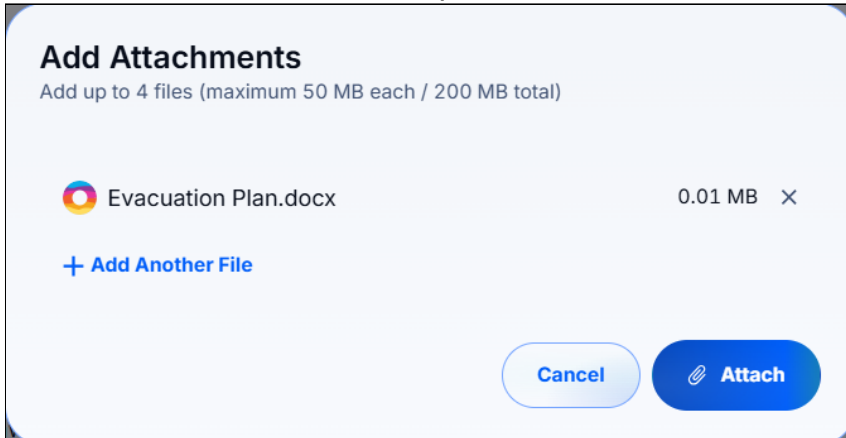
Operators can use the **Notes** panel to leave messages or important context for one another in real-time. Any existing Notes will be displayed for review, including when they were left and by whom.

To leave a Note:

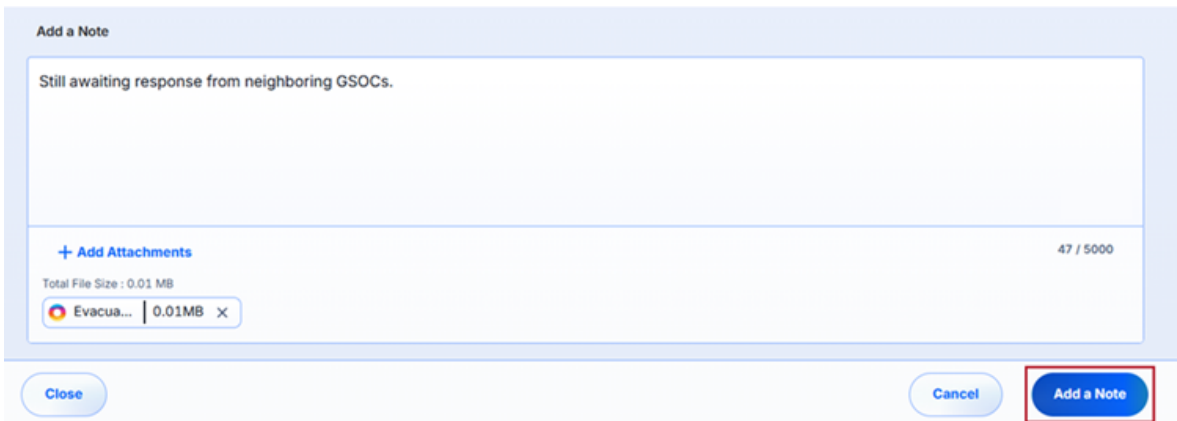
1. Click the **Notes** icon at the top of the **Response Details** page.
2. The Notes panel will open. Review any existing Notes.
3. Type a new Note (up to 5,000 characters) in the text field.



- Optionally, click **Add Attachments** to attach up to four attachments (maximum of 50 MB each/ 200 MB total). Select the desired files and click **Attach**.



- Click **Add a Note**.



6. The new Note will appear in the list for other stakeholders to see.

Notes 2

**SV** 10 seconds ago, by [redacted] >  
 Still awaiting response from neighboring GSOCs.

**SV** 19 minutes ago, by [redacted] >  
 Sent to local operators for response coordination.

**Add a Note**

Type a note, add any attachments then save

[+ Add Attachments](#)
0 / 5000

[Close](#)

- Users can expand a Note to review its details and any attachments by clicking on its arrow. They can also edit it or delete Notes from here, if needed.

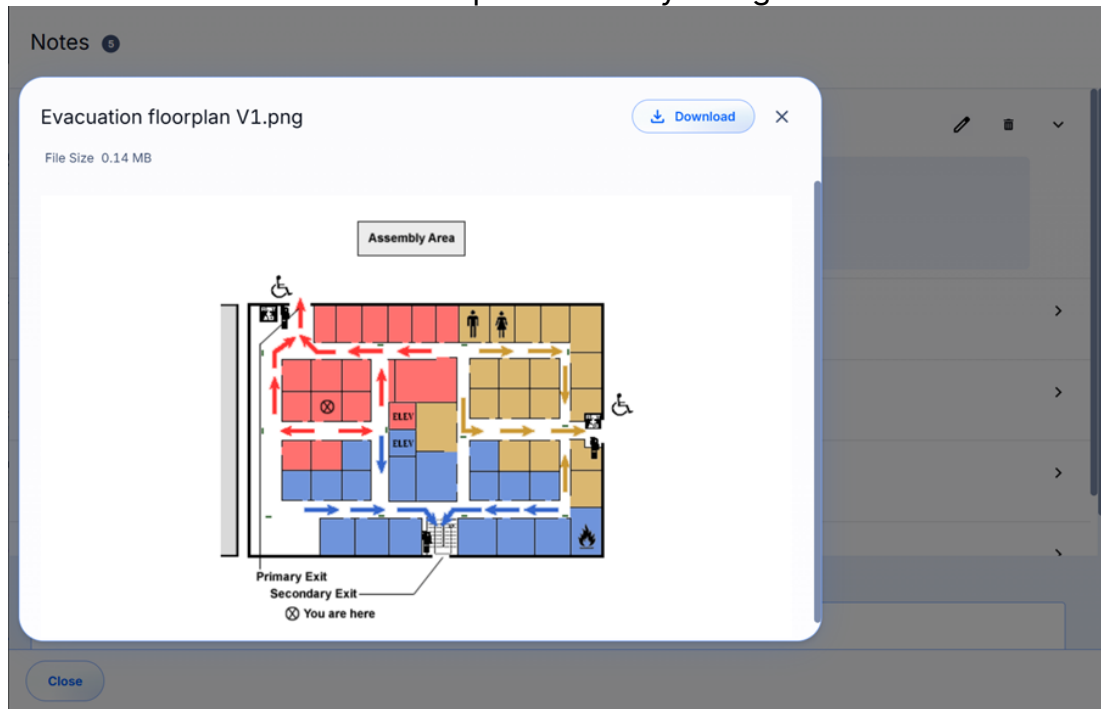
**SV** Aug 27, 2025 12:27 IST, by [redacted] ✎ 🗑️ ⌵

Still awaiting response from neighboring GSOCs.

📎 Evacua... | 0.01MB

**SV** Aug 27, 2025 12:08 IST, by [redacted] >  
 Sent to local operators for response coordination.

- Note Attachments can also be previewed by being clicked on.



## Overview Tab

The **Overview** tab is the default landing place when opening the **Response Details** page. It contains **Summary Views** of Task Lists, Communications, and Trackers, while also allowing users to review the **Response's Description**, **Response General Details**, **Affected Assets and People**, **Escalations**, **Alerts**, **Location**, and **Response Additional Details**.

The screenshot displays the 'Overview' tab interface. At the top, a navigation bar includes 'Overview', 'Dashboards', 'Alerts', 'Communications', 'Tasks', 'Impacts', 'Documents', 'Trackers', 'Form Reports', 'Situation Reports', 'Meeting', 'Root Cause', and 'Escalated Submission'. The main content area is divided into several sections:

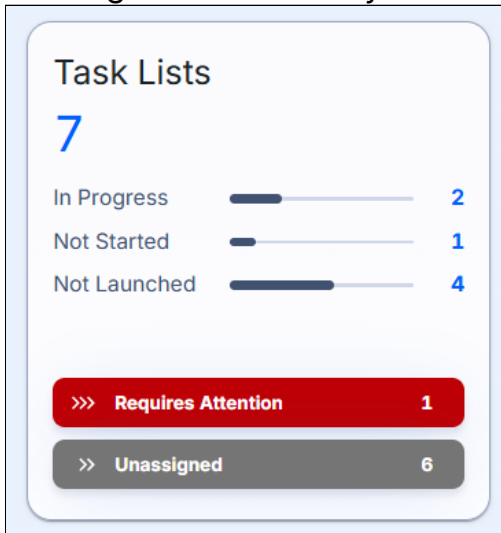
- Task Lists:** Shows 7 total task lists. Sub-sections include 'In Progress' (2), 'Not Started' (1), and 'Not Launched' (4). Action buttons include 'Requires Attention' (1) and 'Unassigned' (6).
- Communications:** Shows 15 total communications. Sub-sections include 'Not Launched' (2) and 'Closed' (13). Action buttons include 'Below 80% Confirmation R...' (13) and 'Below 50% Confirmation R...' (13).
- Trackers:** Shows 4 total trackers. Sub-sections include 'Active' (2), 'Not Launched' (1), and 'Closed' (1). Action buttons include '0% completion' (2).
- Map:** A map of California with a blue circle highlighting the Central Valley region, including cities like Fresno, Bakersfield, and Los Angeles.
- Description:** Provides a brief overview of the response and lists immediate actions required, such as 'Facility securing and inventory protection protocols'.
- Assets:** 689 assets.
- People:** 5274 people.
- Escalated Submissions:** 0.
- Alerts:** 2.
- Response Additional Details:** Includes fields for Advisory Type (Winter Weather Advisory), Alert Type (INITIAL), Category (3), Evacuation Centers, Risk Level, Regional Impact Area, Response Classification Level, External Agency Notified, Additional Details, Affected Systems, and Support Requested.
- Response General Information:** Includes Time Zone (India Standard Time), Folder (Uncategorized), Launched Time (Jul 22, 2025 03:13 IST), Launched By, Notification Task and Dashboard (On), Response Last Modified By, Response Last Modified Time (Aug 27, 2025 14:07 IST), Mode (Live), and Template (Hurricane & Storm Response Plan).

## Summary Views

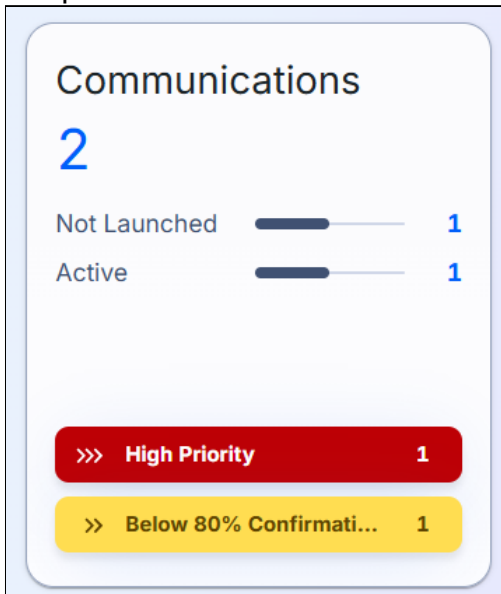
The **Summary View** tiles surface important details about the Response's Task Lists, Communications, and Trackers.

- **Task List Summary View** - Displays the total number of Task Lists and their status (In Progress, Not Started, and Not Launched). Any Task Lists that require attention or that are currently unassigned can be seen here, as well.

Clicking on the Summary View will open the Response's **Task List** tab.

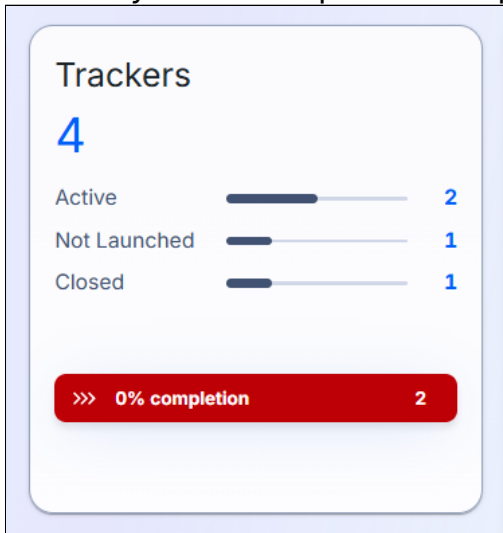


- Communications Summary View** - Displays the total number of Communications attached to this Response, including how many have been Closed or have yet to be launched. It also offers insight into the confirmation rates for these Communications. Clicking on the Summary View will open the Response's **Communications** tab.



- Trackers Summary View** - Displays the total number of Trackers, including those that are Active, Not Launched, or Closed. It also offers a completion percentage for the Active Trackers to help monitor responses. Clicking the

Summary View will open the Response's **Trackers** tab.



## Description

The **Response Description** is either inherited from the used Response template or entered manually by the operator during launch. It should offer a high-level explanation of the Response that clearly outlines the risk and stakes, as well as any other information necessary to accurately convey the situation to stakeholders. It can be edited post-launch as long as the Response is still active.

**Description** [Edit](#)

Primary concerns include power outages, flooding, structural damage to facilities, supply chain disruptions, and employee/customer safety risks.


**Immediate Actions Required:**

- Facility securing and inventory protection protocols


[More](#)

## Impact Summaries


The **Impact Summaries** section displays the total number of affected Assets, People, Escalated Submissions, and Alerts associated with this Response. Clicking on a total will open the **Impact** tab for further analysis.




**Assets**  
689



**People**  
5274



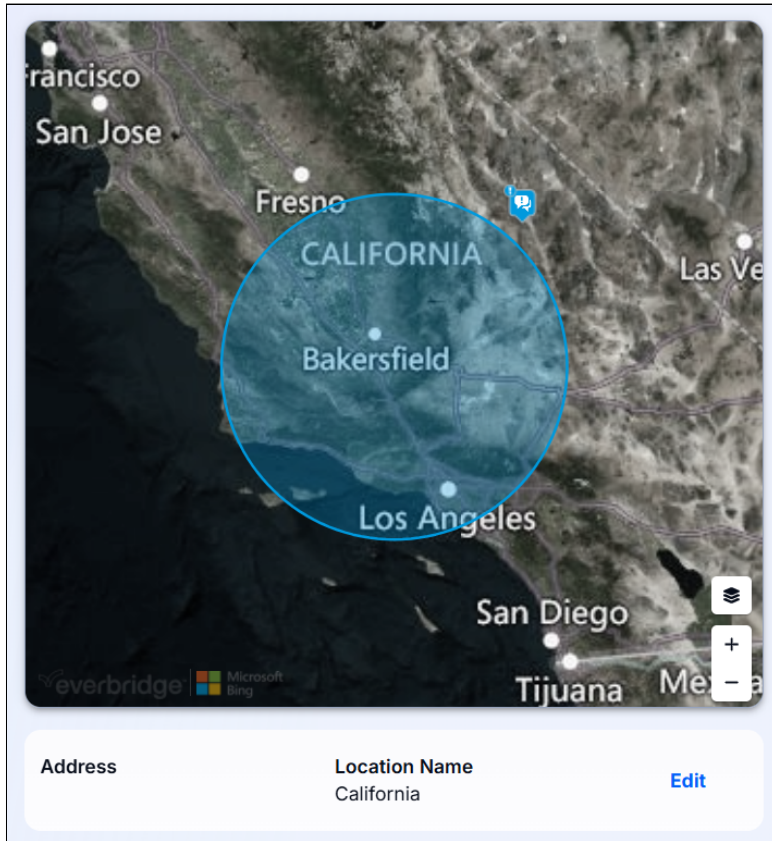
**Escalated Submissions**  
0



**Alerts**  
2

## Location

The **Location** section provides the location of the Response, which can be edited as needed so long as the Response is still active.



## Response General Information

The **Response General Information** section offers key details about the Response, such as the Time Zone it was launched in, who launched it, and which template was used.

### Response General Information Edit

<p><b>Time Zone</b> India Standard Time</p> <p><b>Folder</b> Uncategorized</p> <p><b>Launched Time</b> Jul 22, 2025 03:13 IST</p> <p><b>Launched By</b> [Redacted]</p> <p><b>Notification Task and Dashbo...</b> On</p>	<p><b>Response Last Modified By</b> [Redacted]</p> <p><b>Response Last Modified Time</b> Aug 27, 2025 14:07 IST</p> <p><b>Mode</b> Live</p> <p><b>Template</b> Hurricane &amp; Storm Respons...</p>
---	---

Click **Edit** to change the Response's Time Zone, End Time, or Folder. If desired, enable or disable notifications from being sent to a user when they've been assigned a Task or sent a Dashboard.

### Response General Information

**\* Time Zone**

🔍

Time Zone

(GMT+05:30) India Standard Time (Asia/Calcutta)

▼

**End Time**

MM-DD-YYYY HH:MM

📅

**\* Folder**

Uncategorized

✕ ▼

**Notification Task and Dashboard Alerts**

✓ On

✗ Off

Close

Save

## Response Additional Details

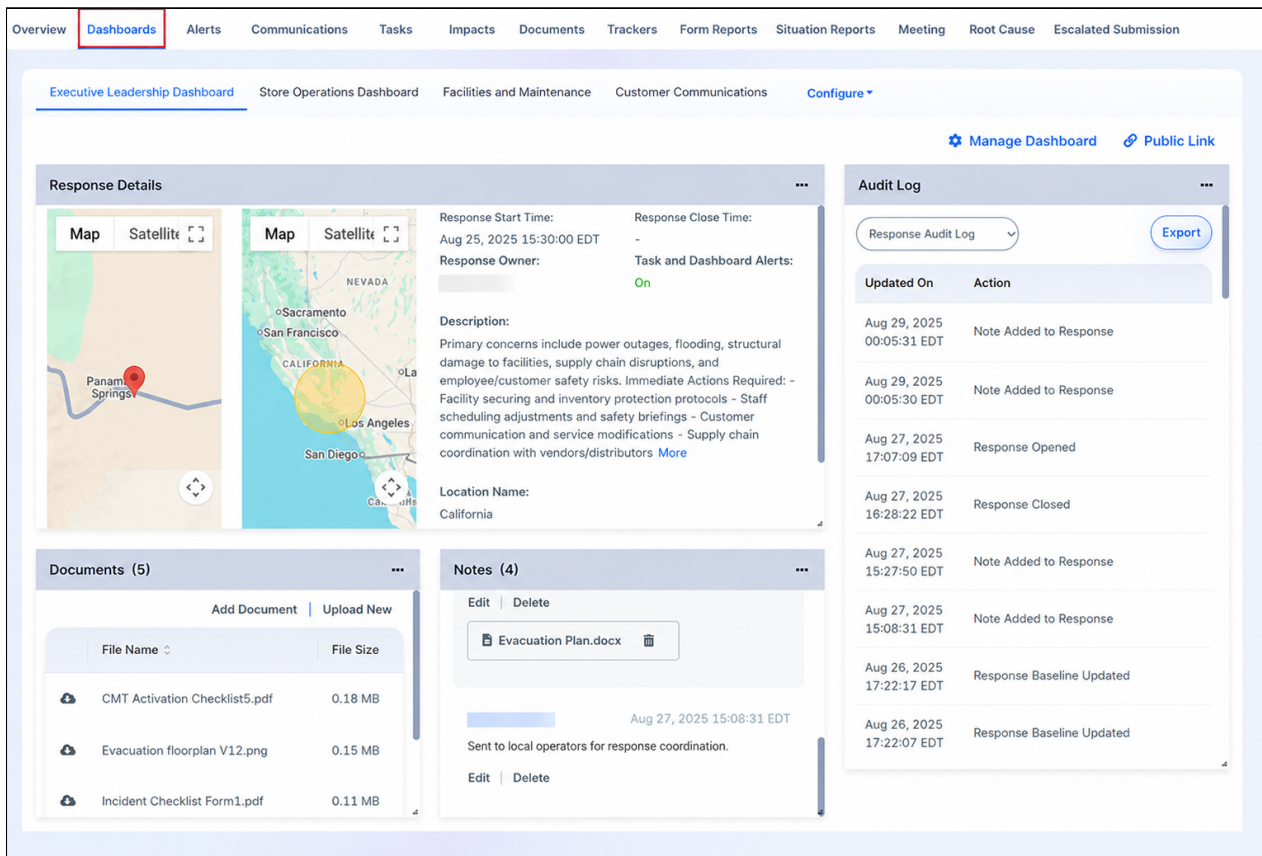
Any Custom Fields or Incident Variables configured in the Response Template will appear in the **Response Additional Details** section.

**Response Additional Details**
[Edit](#)

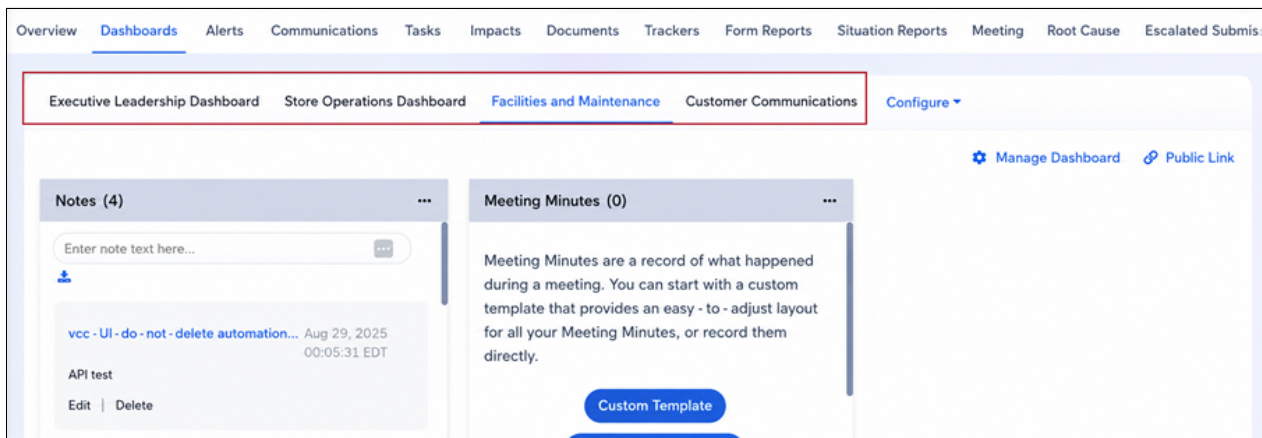
<p><b>Advisory Type</b> Winter Weather Advisory</p>	<p><b>Alert Type</b> ⓘ INITIAL</p>	<p><b>Category</b> 3</p>
<p><b>Evacuation Centers</b> Memorial Sports Complex - 450 Stadiu...</p>	<p><b>Risk Level</b> High: Significant disruption to operatio...</p>	<p><b>Regional Impact Area</b> Metropolitan area impacted</p>
<p><b>Response Classification Level</b> Level 2: Regional incident requiring are...</p>	<p><b>External Agencies Notified</b> Police, fire department, emergency me...</p>	<p><b>Additional Details</b> The announced work stoppages are lik...</p>
<p><b>Affected Stores</b> Number of affected stores: 3 1. CX- 23 ...</p>	<p><b>Support Requested (Emergency Servic...</b> Fire suppression, medical response tea...</p>	

## Dashboards Tab

The **Dashboards** tab allows users to review and manage a Response's Dashboards, as well as create new ones post-launch. Dashboards are single-pane displays built from data-driven, arrangeable Widgets that can be configured to display information most important to specific stakeholders.



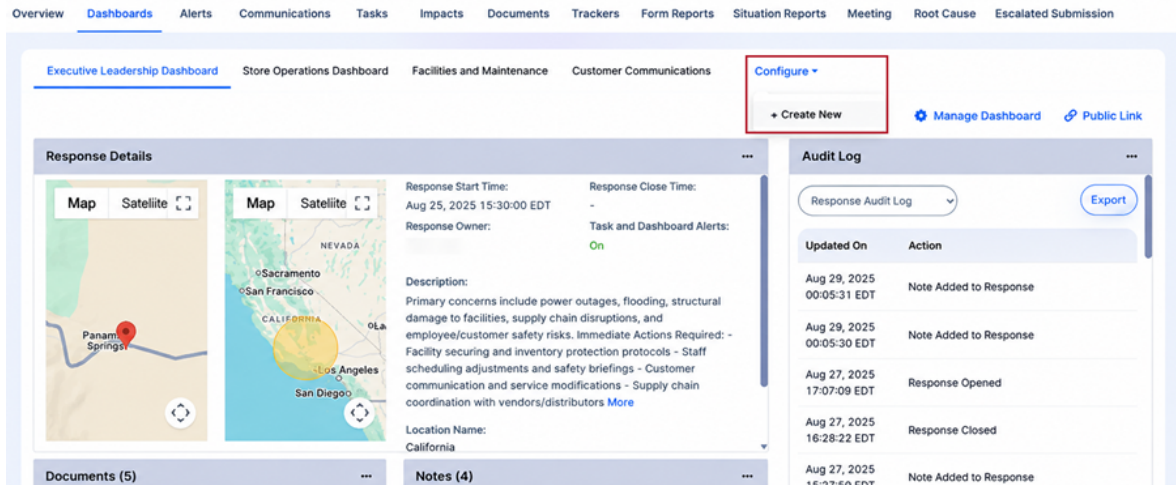
Clicking on the individual Dashboards from the list allows users to switch between them with ease.



## Creating a Dashboard

Dashboards can be created for a Response directly from its **Dashboards** tab. To create a Dashboard:

1. Click **Configure**, then **Create New**.



2. The **Add Dashboard** modal will open. Give the new Dashboard a name that clearly describes its intended purpose.
3. Select the desired Widgets to add to this Dashboard.

- Under **Responses**, choose which Widgets to include on the Dashboard.

The following Widgets are available for selection and configuration:

- **Response Details** - Displays key details about the Response.
- **Incident Notifications** - Displays information about Incident Notifications associated with the Response.
- **Root Cause** - If applicable, specifies the Root Cause of the Response.
- **Documents** - Displays any included Documents.
- **Task and Note Documents** - Displays any Documents attached to Tasks or Notes.
- **Dashboard Comments** - Users can add Comments about a single Dashboard in the Response. Dashboard Comments are only shared with others who have access to the Dashboard. Users can edit or delete their own Comments, while Administrators can edit or delete those left by others.
- **Notes** - Displays Notes related to the Response. Users can edit the Widget title and add Notes to the dashboard, including up to 4 attachments (images and other file types). Notes are shared

- across the Response. Users can edit or delete their own Notes, while Administrators can edit or delete those left by others.
- **Meeting Minutes** - Displays a record of what happened during a meeting.
  - **Audit Log** - Allows users to see a Response Audit Log, Dashboard Audit Log, or both. They can also export these audit logs.
  - **Tasks Needing Attention** - Displays the Tasks that need attention. Click a Task to see its Task List Details, from which you can change the status of a Task List item. You can also add Comments to a Task, including a maximum of 4 files.
  - **Escalated Submissions** - Displays any Escalated Submissions associated with this Response.
- Under **Tasks**, select any Task Lists that should be included on the Dashboard as Widgets, or select **All Task Lists**.

### Add a Dashboard ✕

?

Step 1 of 3 - Select available widgets

\* Dashboard Name:

Select the widgets that will be available to the other viewers of this dashboard:

Responses

All Task Lists

Tasks

Browse and Select Task Lists (7)

Show: All ▾

Facility Lock Down

Hurricane Preparedness - HR

Pre -Hurricane Preparation Activities

Communication Tasks

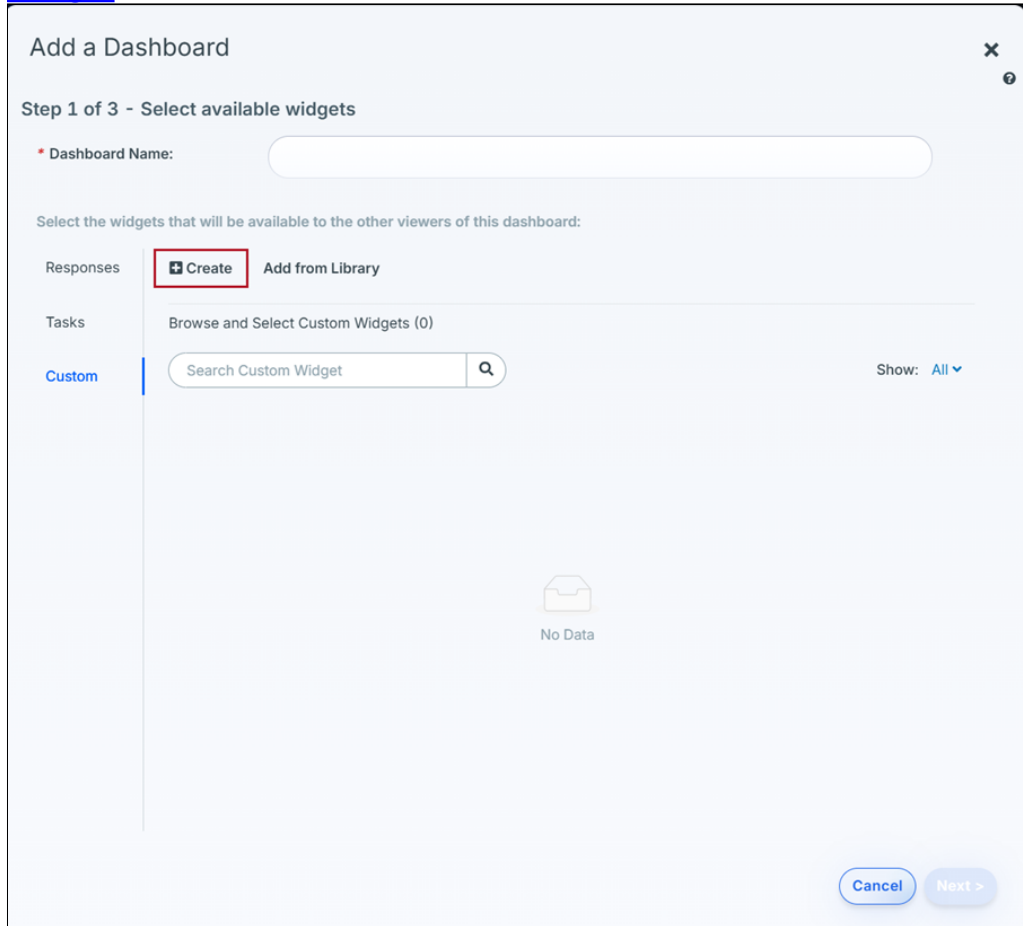
Hurricane Activation - CMT

Hurricane Recovery - Facilities

Incident Response Team

- Under **Custom**, either:

- Click **Create** to create a new Widget from scratch. See [Creating a Widget](#) below for more information.



- Click **Add from Library** to open the Organization's Widget Library, where any existing Widgets can be found categorized by type (Custom Text, Webpage, Widget Comment). Add any desired

Widgets, then click **Add to Dashboard**.

**Add Widget from Library**

All | Custom Text | Webpage | Widget Comment

Search

<input type="checkbox"/> Widget Name	Type	Last Modified On
<input checked="" type="checkbox"/> Custom Widget - Comment	Widget Comment	Jun 11, 2024 02:02:27 EDT
<input checked="" type="checkbox"/> Custom Widget - URL	Webpage	Jun 11, 2024 02:02:07 EDT
<input type="checkbox"/> Custom Widget Text	Custom Text	Jun 11, 2024 02:01:42 EDT
<input type="checkbox"/> Document Library	Widget Comment	Nov 14, 2024 00:50:24 EST
<input checked="" type="checkbox"/> EB Policy	Webpage	Jun 11, 2024 02:37:30 EDT
<input type="checkbox"/> Everbridge Privacy Policy	Custom Text	Jun 6, 2024 05:52:37 EDT
<input type="checkbox"/> Generic Widget Comment	Widget Comment	Apr 5, 2024 08:37:59 EDT
<input type="checkbox"/> Generic Widget Comment Special	Widget Comment	Jun 6, 2024 01:51:38 EDT
<input type="checkbox"/> Hello	Custom Text	Feb 26, 2025 14:11:23 EST
<input type="checkbox"/> g	Custom Text	Feb 21, 2025 01:08:17 EST

View 1 - 10 of 13 < 1 2 > 10 / page

Once added to a dashboard, any changes are relegated to this dashboard view and do not affect the library version

4. Click **Next** once all of the desired Widgets have been chosen to specify which users should have access to this new Dashboard. Select either:
- **All Users** - Make this Dashboard available to all Organizational users.

**Add a Dashboard**

Step 2 of 3 - Share with users

Which users of this portal are permitted to see this dashboard?

**All Users**

Private - Organization administrators and invited users can access the dashboard

- **Private** - Invite specific roles and/or Users to access this Dashboard. Note that Organization Administrators will have access by default.

**Add a Dashboard** [Close]

**Step 2 of 3 - Share with users**

Which users of this portal are permitted to see this dashboard?

All Users

**Private** - Organization administrators and invited users can access the dashboard

<p>Roles</p> <p>Selected (1) <a href="#">Select Roles</a></p> <p><input checked="" type="checkbox"/> Internal Everbridge Stakeholder</p>	<p>Users</p> <p>Selected (3) <a href="#">Select Users</a></p> <p><input checked="" type="checkbox"/> Sarah</p> <p><input checked="" type="checkbox"/> Jency</p> <p><input checked="" type="checkbox"/> Emma</p>
--	---

[Cancel] [ < Back ] [ Next > ]

5. Click **Next** to select the Contacts who will have access to this Dashboard in their Member Portal. They can be selected as Individuals or via Groups and Rules.

**Add a Dashboard** [Close]

**Step 3 of 3 - Share with contacts**

Which contacts are permitted to see this dashboard on the Member Portal?

2

Individuals

1

Groups

1

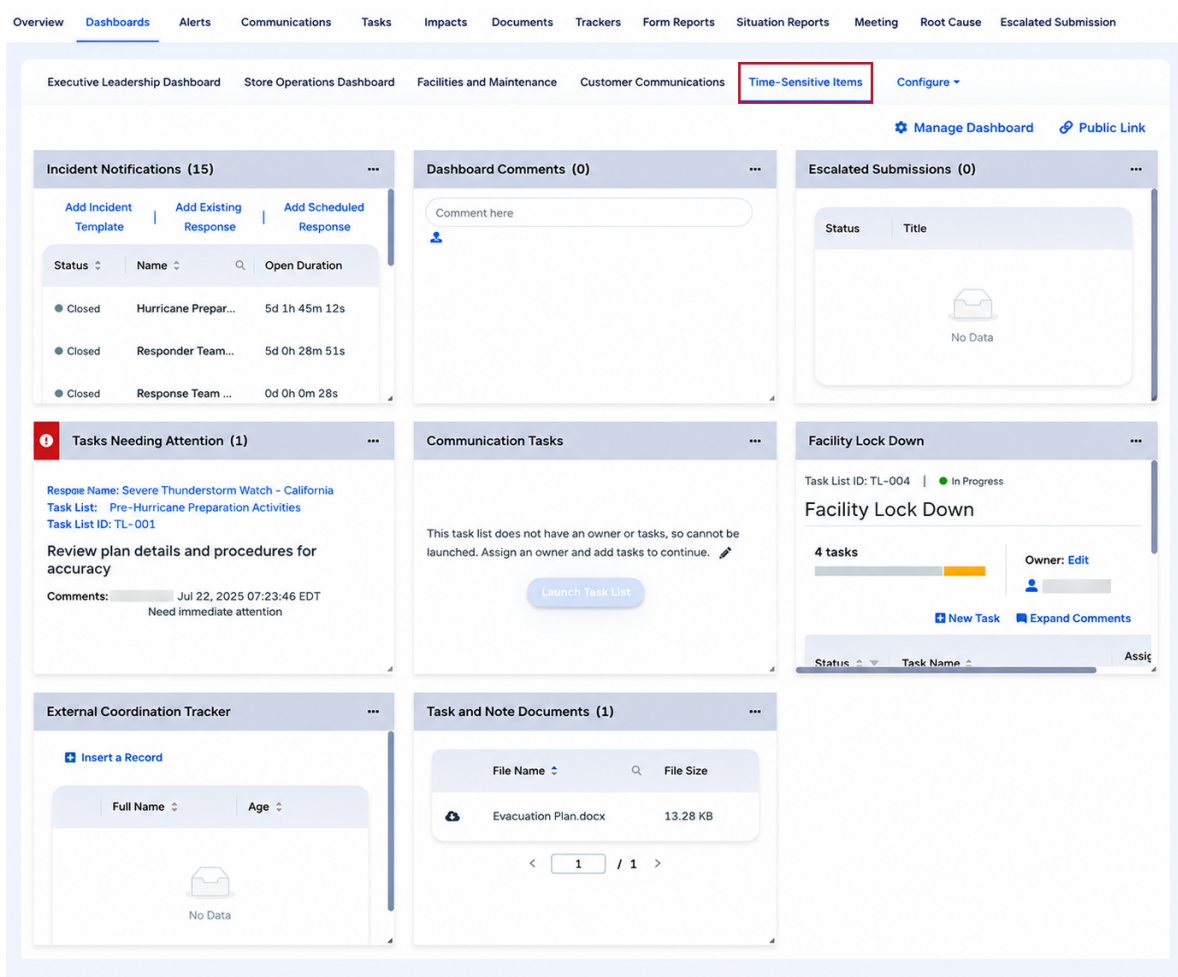
Rules

Preview Contacts Clear selected contacts

**1** Mobile push, SMS and email are default for dashboard sharing notifications path. Users can narrow the path to one only in alert templates settings.

[Cancel] [ < Back ] [ Save ]

- Click **Save**. The modal will close and open the new Dashboard in the list view, where it can be refined further as needed.



## Creating a Widget

Widgets can be created on-the-fly for a Response from its **Details** page. To create a Widget:

- Navigate to the **Dashboards Tab > Configure > Create New**.

2. On the **Custom** tab, select **Create**.

Add a Dashboard
✕

Step 1 of 3 - Select available widgets

\* Dashboard Name:

Select the widgets that will be available to the other viewers of this dashboard:

Responses

+ Create

Add from Library


Tasks

Browse and Select Custom Widgets (0)

Custom

🔍

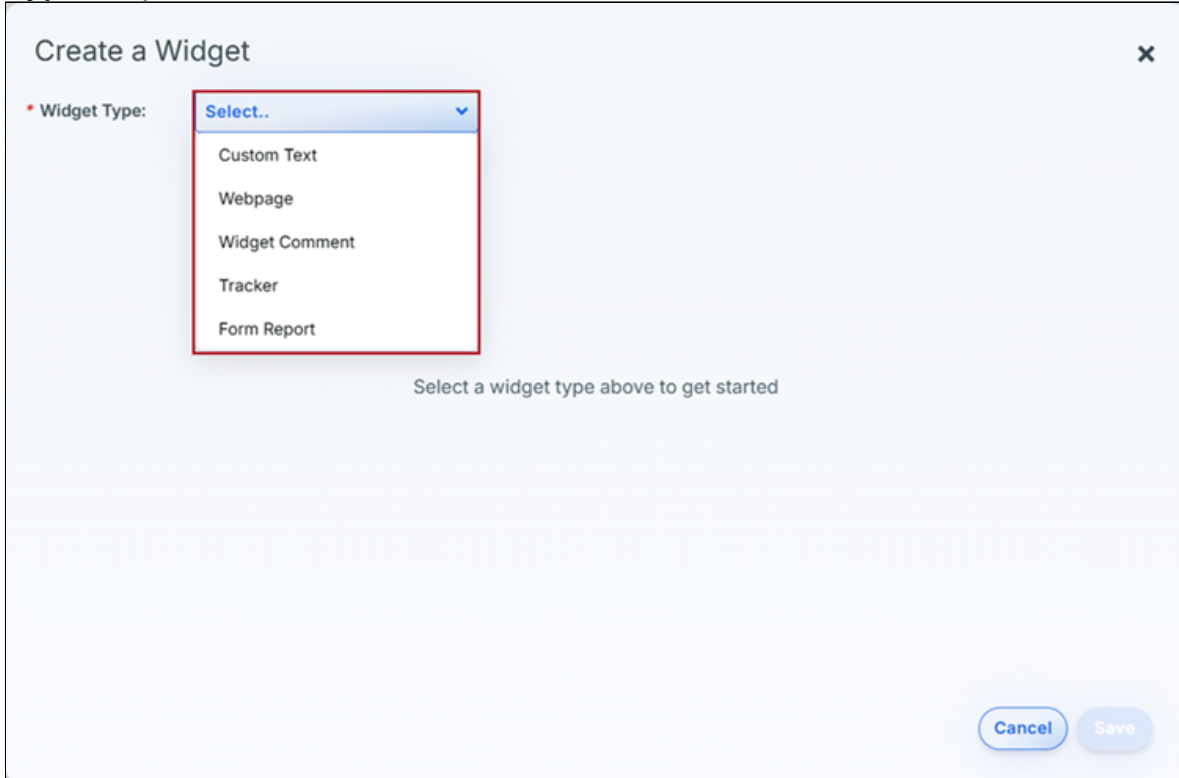
Show: All ▾



No Data

Cancel
Next >

3. The **Create Widget** modal will open. Select the desired type from the **Widget Type** dropdown, then click **Next**.



Create a Widget

Widget Type: Select..

- Custom Text
- Webpage
- Widget Comment
- Tracker
- Form Report

Select a widget type above to get started

Cancel Save

4. Give the Widget a Title and fill in any required fields, which are determined by the selected Widget Type. For example, if the **Tracker** type was chosen, the user will be prompted to select an existing Tracker to surface as a Widget.

Click **Save**.

The screenshot shows the 'Create a Widget' modal with the following details:

- Widget Type:** Tracker
- Title:** External Coordination Tracker
- Buttons:** Default, List, Search
- Table:**

Status	Tracker Name	Last Modified On
<input type="radio"/> Closed	Preparation Status for Logistics	Aug 27, 2025 17:07:09 EDT
<input type="radio"/> Active	Damage Assessment - T+1	Aug 27, 2025 17:07:09 EDT
<input checked="" type="radio"/> Active	External Coordination	Aug 27, 2025 17:07:09 EDT
- Footer:** View 1 - 4 of 4, 10 / page, Cancel, Save (highlighted with a red box)

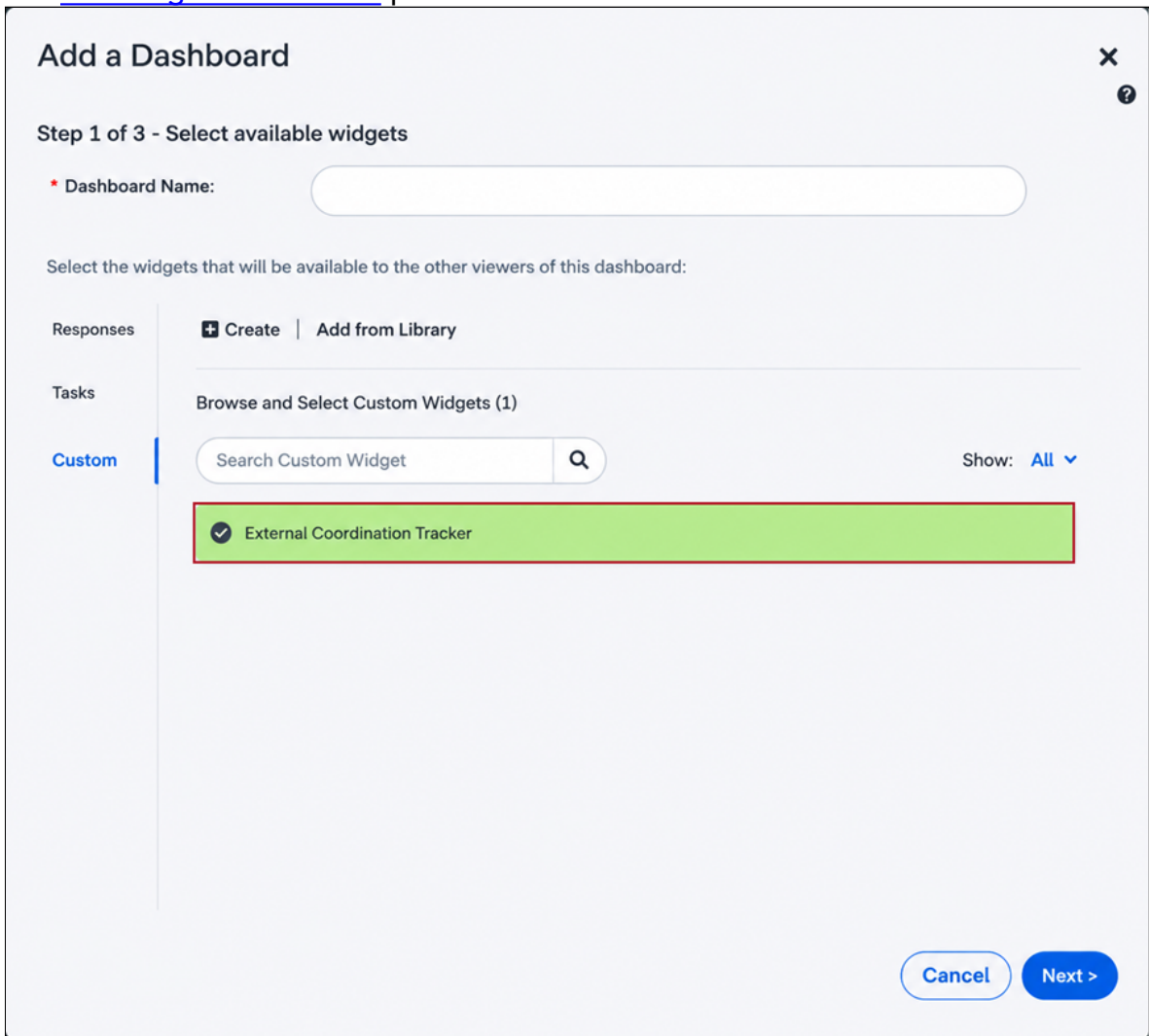
- Note that the **Custom Text**, **Webpage** and **Widget Comment** types include an option to add the new Widget to the Organization's Widget Library upon saving.

The screenshot shows the 'Create a Widget' modal for the 'Custom Text' type with the following details:

- Widget Type:** Custom Text
- Add to Widget Library:**  (highlighted with a red box)
- Title:** (empty field)
- Rich Text Editor:** Paragraph, B, I, S, U, A, 12pt, sans-serif, alignment and list icons.

5. The new Widget will now appear for inclusion on the **Custom** tab of the **Add Dashboard** modal. Continue configuring the Dashboard following the rest of

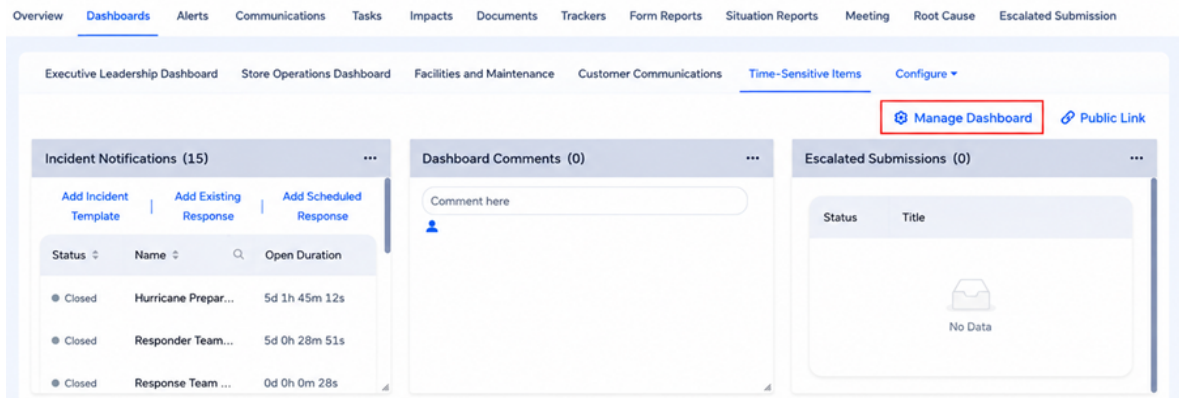
the [Creating a Dashboard](#) process outlined above.



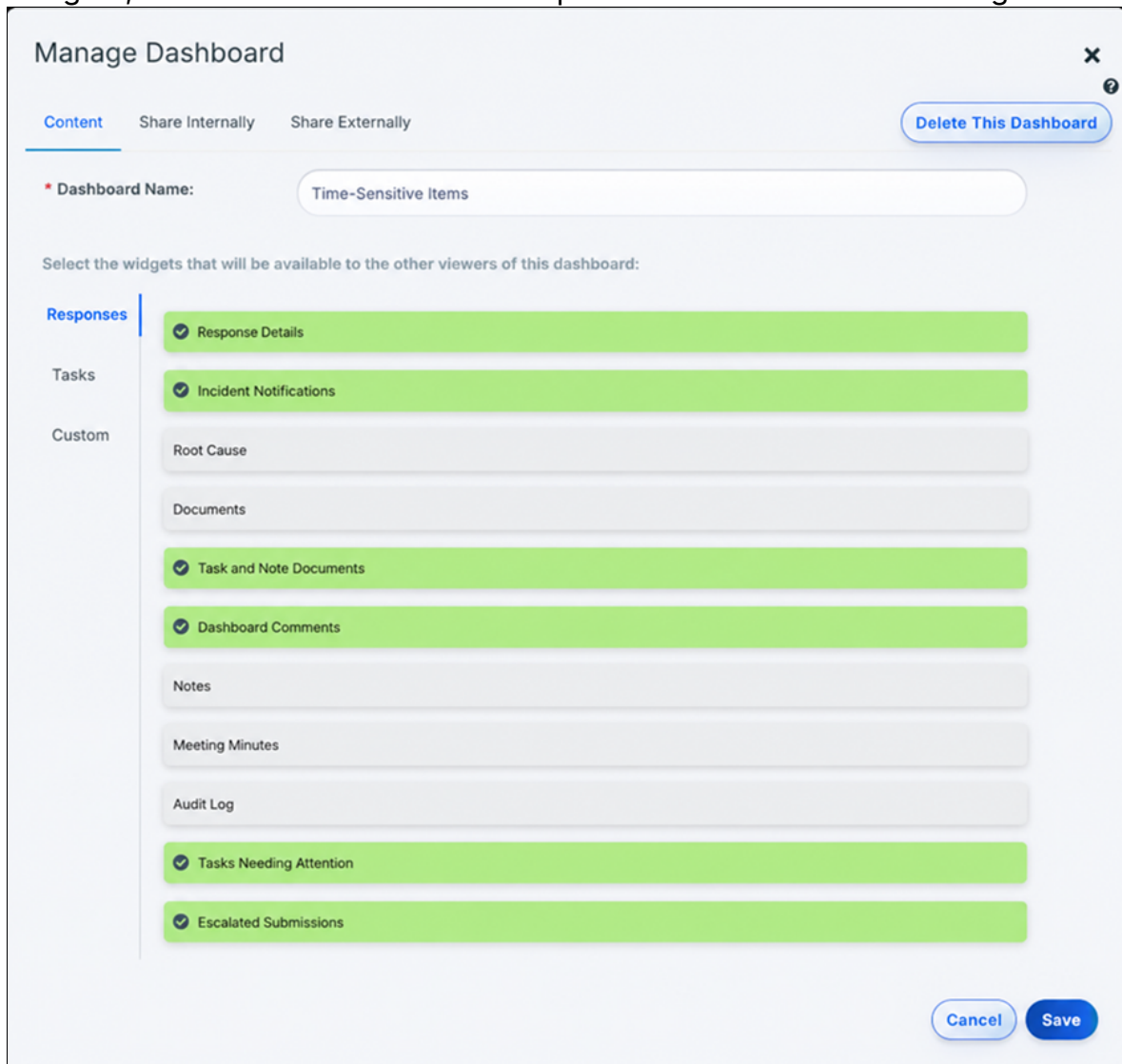
## Managing Dashboards

Individual Dashboards for a Response can be managed and edited from the Dashboards tab. To do this:

1. Select the Dashboard to be edited and click **Manage Dashboard**.



2. The **Manage Dashboard** modal will open, allowing users to manage its Widgets, Internal and External Share options. Make the desired changes.

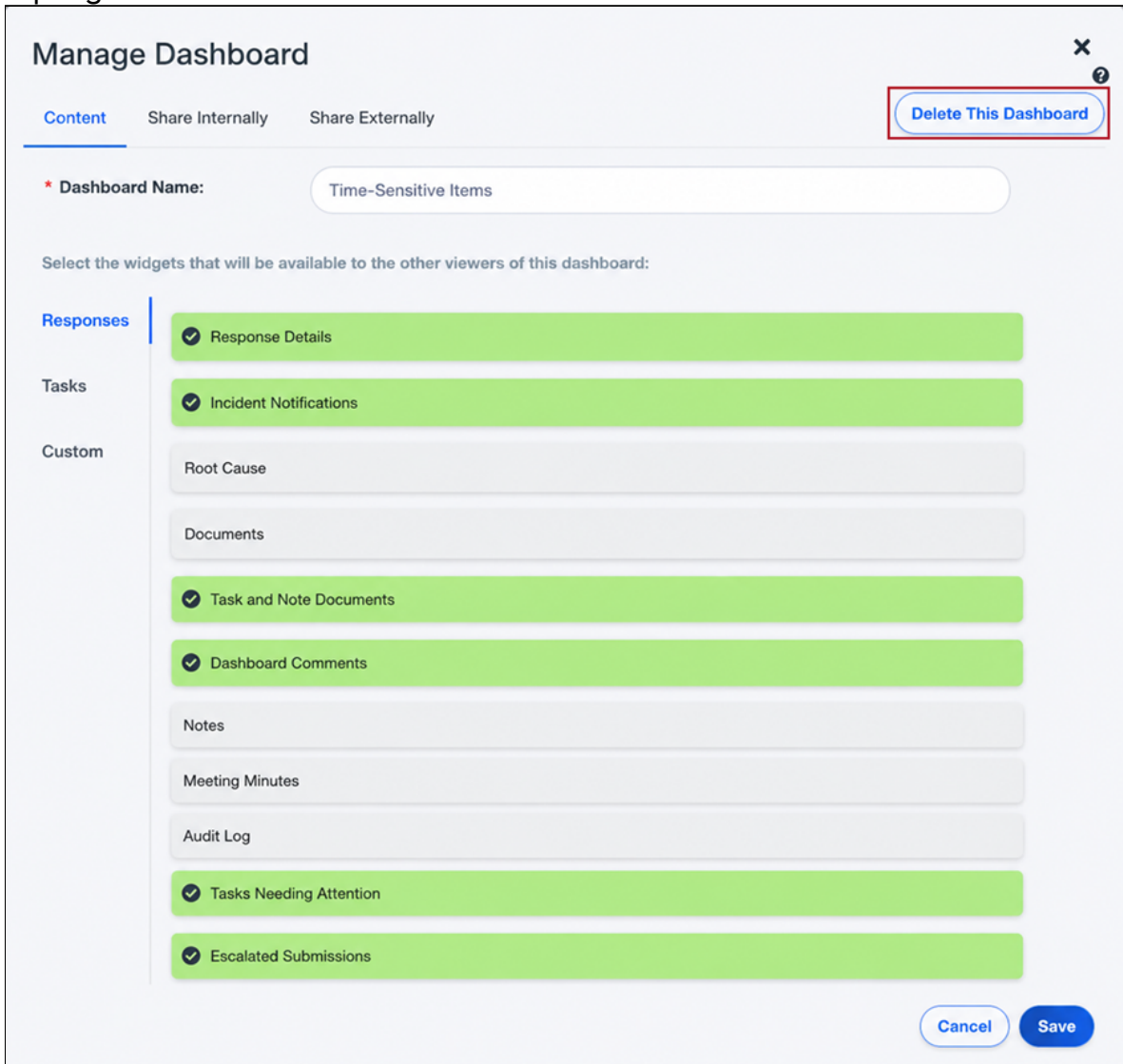


3. Click **Save** to retain the changes and be returned to the **Dashboards** tab.

## Deleting a Dashboard

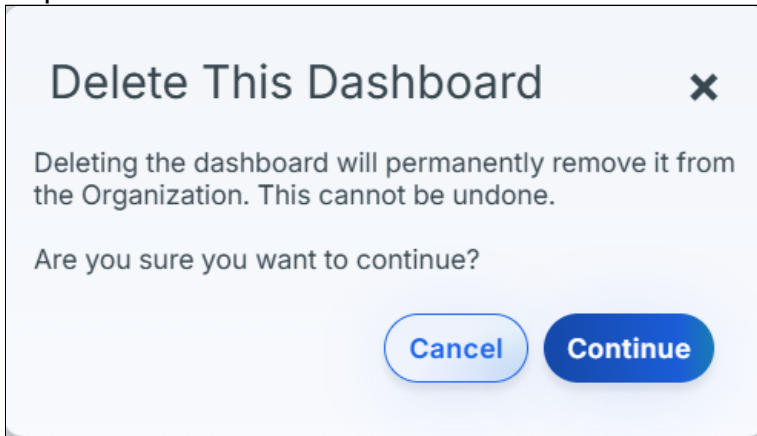
A Dashboard can be removed from a Response from the **Dashboards** tab. To do this:

1. Select the Dashboard that needs to be deleted, then click **Manage Dashboard**.
2. The **Manage Dashboard** modal will open. Click **Delete This Dashboard** in the top-right corner.



3. A confirmation modal will appear, informing the user that deleting the Dashboard will permanently remove it from the Organization. Click **Continue**

to proceed.

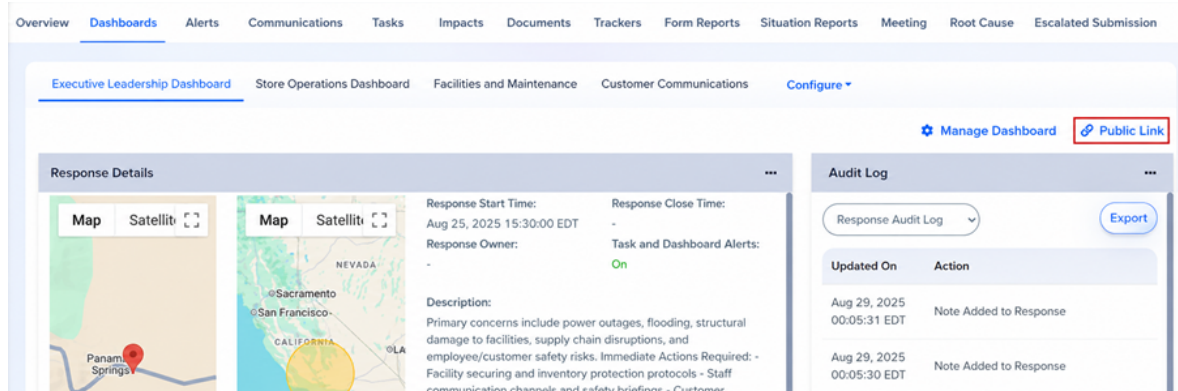


4. The Dashboard will be deleted and the user returned to the **Dashboards** tab.

## Sharing with Public Links

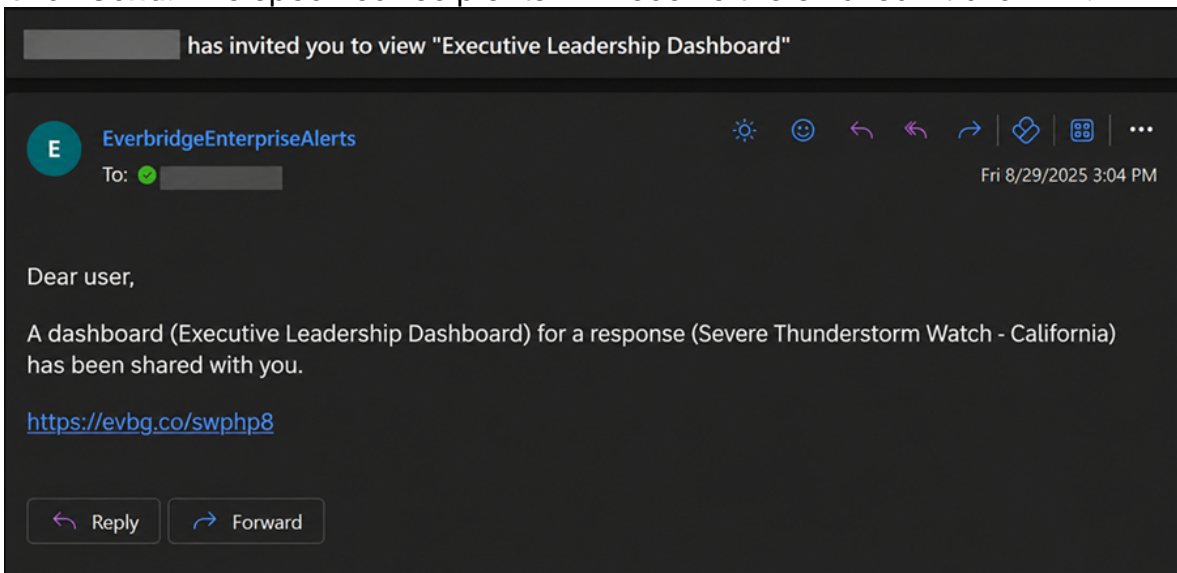
Individual Dashboards can be shared via Public Links emailed directly to specified recipients. To create a Public Link:

1. Select the desired Dashboard.
2. Click **Public Link**.



- The **Public Link** modal will open. Add at least one email address in the **Email Recipients** field. Up to 200 addresses can be entered at a time.

- Edit the **Message** field as needed, which will be used as the body text of the email.
- Optionally, click **Copy** to save the Public Link to the clipboard and record it in a safe place.
- Click **Send**. The specified recipients will receive the emailed Public Link.



## Managing Widgets

Widgets can be resized and rearranged on a Dashboard for flexibility and ease of use. They can also be edited or deleted as needed.

### Resizing Widgets

Widgets can be resized by clicking the bottom-right corner and dragging it to adjust the height and width to the optimal size.

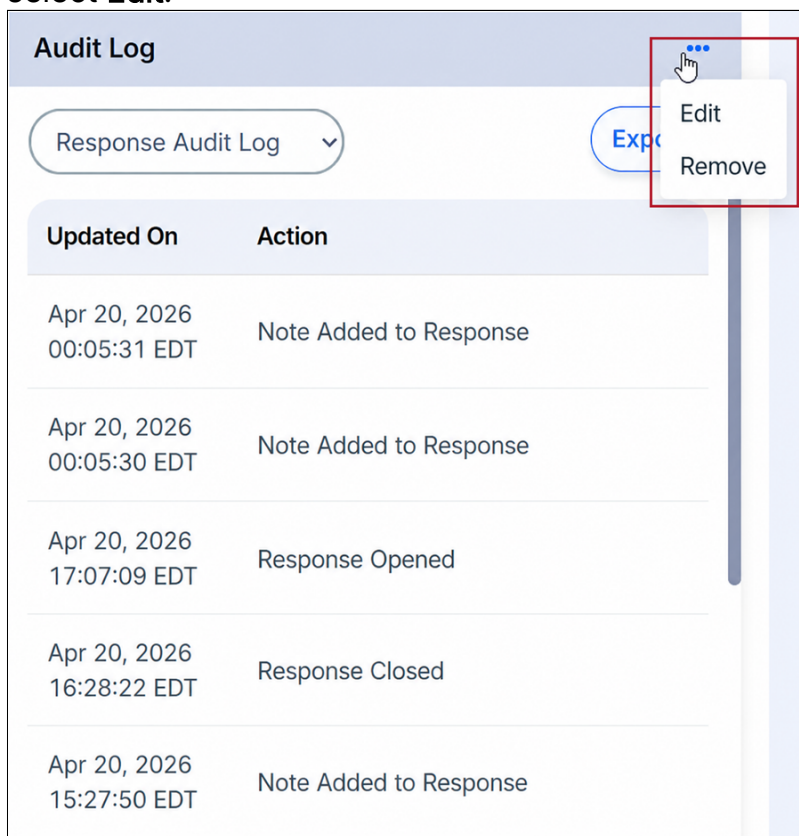
### Rearranging Widgets

Click a Widget's header and drag it around the Dashboard interface to rearrange it as desired.

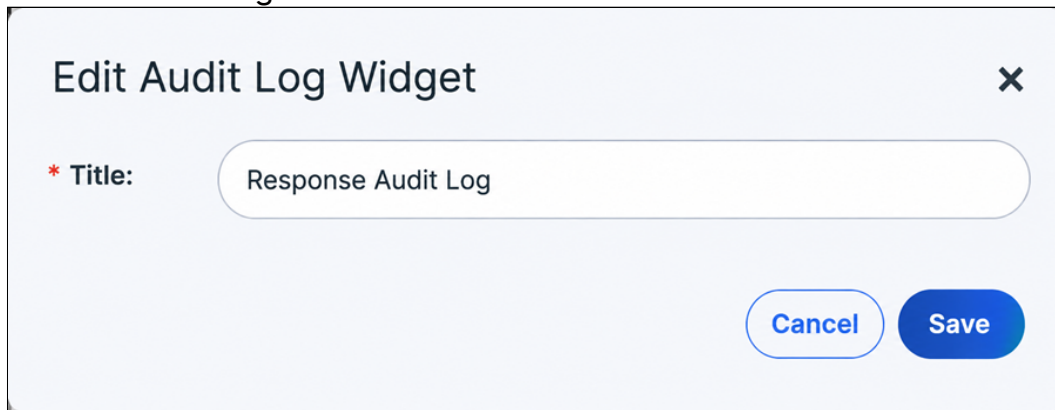
### Editing Widgets

Users can change the name of a Widget on a Dashboard. To do this:

1. Select a Dashboard.
2. Click the meatball menu icon for the Widget that needs to be edited and select **Edit**.



3. Rename the Widget.



Dialog box titled "Edit Audit Log Widget" with a close button (X) in the top right corner. The "Title:" field is required and contains the text "Response Audit Log". At the bottom right, there are "Cancel" and "Save" buttons.

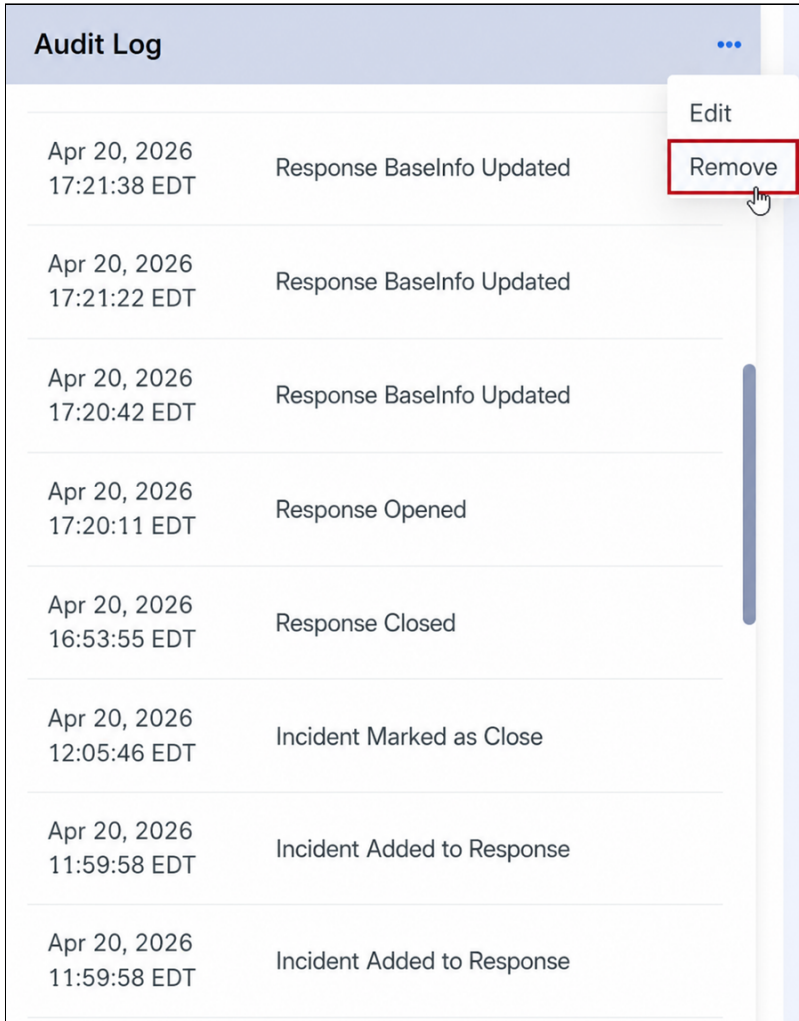
4. Click **Save**.

## Removing a Widget

Users can remove a Widget from a Dashboard. To do this:

1. Select the Dashboard.

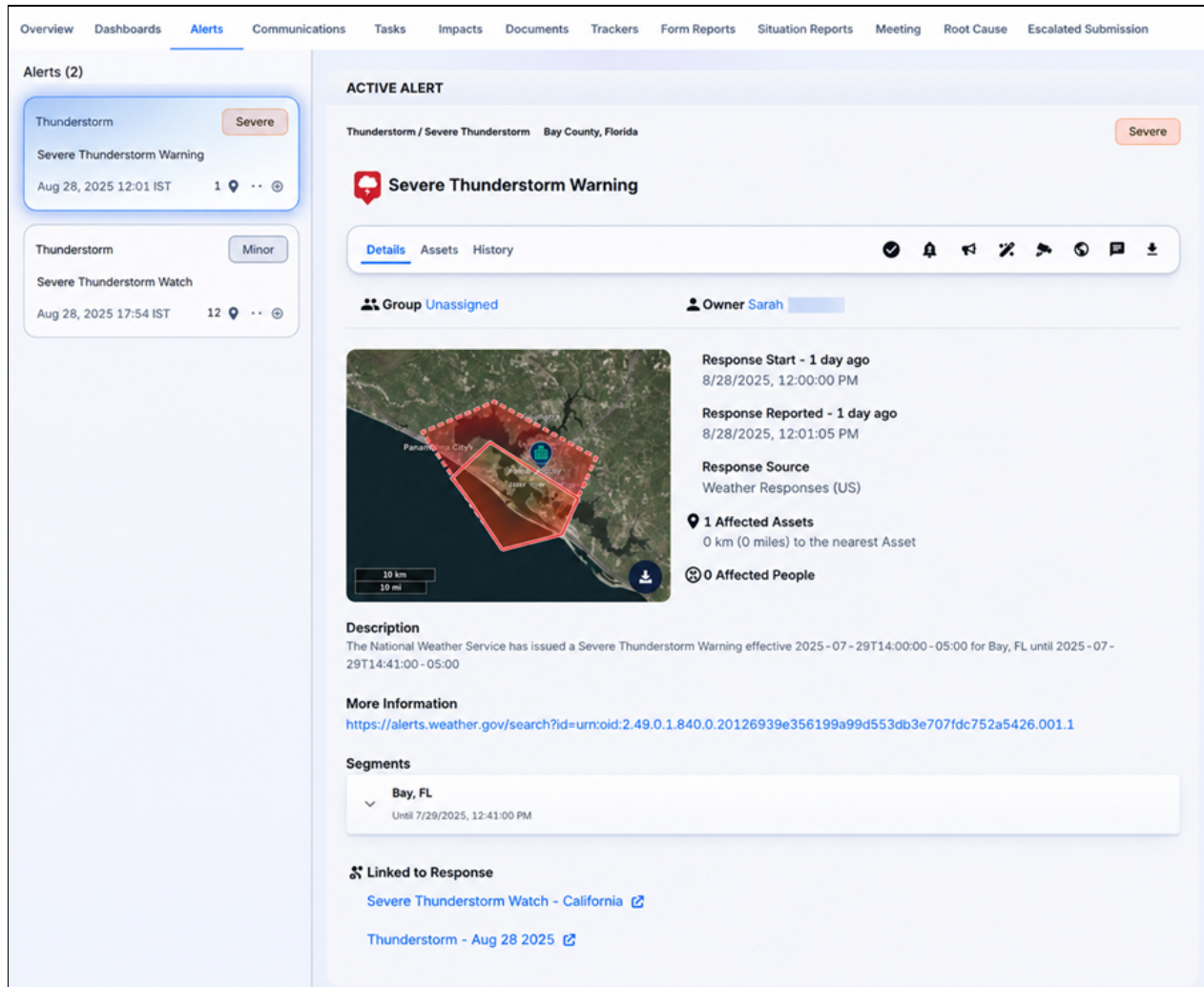
2. Click the meatball menu icon for the Widget that needs to be deleted and select **Remove**.



3. The Dashboard will reload without the deleted Widget.

## Alerts Tab

The Alerts tab houses any Alerts that have been sent out for this Response.



Open an Alert by clicking on it from the **Total Alerts** panel to the left. The Alert is broken into three tabs:

- Details
- Assets
- History

**NOTE:** For a detailed explanation of Alert Management, see the [Visual Command Center User Guide](#).


## Details Tab


The **Details** tab (shown above) is the default view when clicking on an Alert from the list and contains the following details:


- Response Start Date/Time
- Response Reported Date/Time
- Response source
- Count Affected Assets
- Distance to nearest Asset
- Count Affected People
- Distance to nearest Person
- Alert Map Image
- Alert Description
- Alert More Information
- Linked to Response

## Linked to Response

Any Responses linked to this Alert will be shown in the **Linked to Response** section at the bottom of the page. Click on a Response to navigate to it in the Manager Portal, or if needed, click **Unlink** to remove the association.

 **Linked to Response**

Severe Thunderstorm Watch - California  ✕ Unlink

Thunderstorm - Aug 28 2025 

## Assets Tab

The **Assets** tab offers an overview of all Assets affected by this Alert.

## History Tab

The **History** tab provides a full timeline of any actions taken on the Alert, like when Risk Event information is updated or the Alert is assigned to an Owner. Click the down arrow on an item to expand its details.



Overview Dashboards Alerts Communications Tasks Impacts Documents Trackers Form Reports Situation Reports Meeting Root Cause Escalated Submission

Alerts (2)

Thunderstorm Severe

Severe Thunderstorm Warning

Jul 29, 2025 12:01 IST 1 📍 ⋮

Thunderstorm Minor

Severe Thunderstorm Watch

Jul 21, 2025 17:54 IST 12 📍 ⋮

**ACTIVE ALERT**

Thunderstorms / Severe Thunderstorm Bay County, Florida Severe

**Severe Thunderstorm Warning**

Details Assets History 🔍 🔔 🔊 🗑️ 📄 📥

8/20/2025, 3:58:49 PM assigned Sarah as the alert owner.

8/20/2025, 3:58:35 PM Reinstated by Sarah

Thunderstorm is intensifying faster than anticipated.

7/20/2025, 1:45:43 PM Automatically acknowledged by the system

7/20/2025, 12:41:00 PM Risk Events information updated

7/20/2025, 12:30:00 PM Risk Events information updated

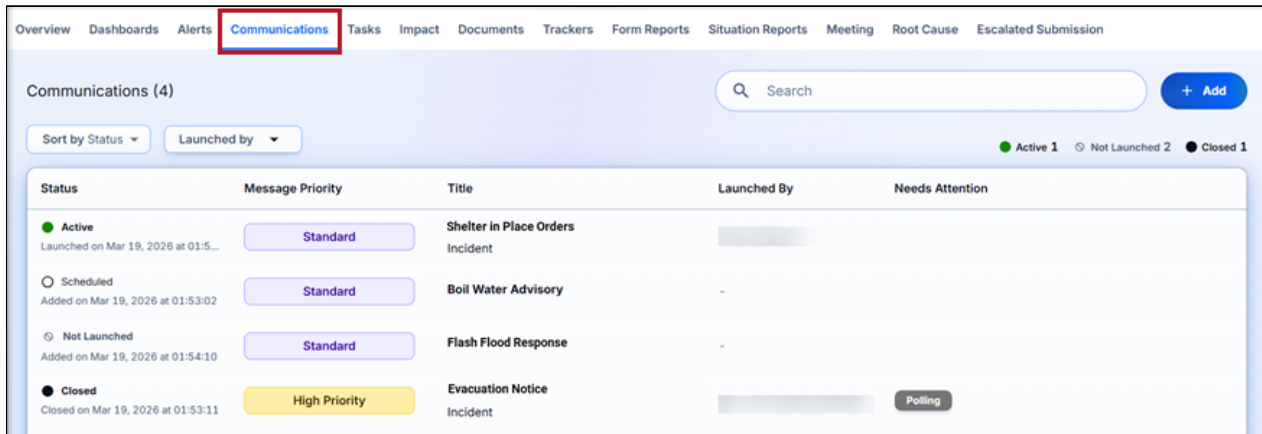
7/20/2025, 12:06:58 PM Initiated a Response with the ID: cm:/6879f43f110177291aad56cc

7/20/2025, 12:06:43 PM Initiated a Response with the ID: cm:/e882228bca45c03ba18ecc13

7/20/2025, 12:01:06 PM Response Created

## Communications Tab

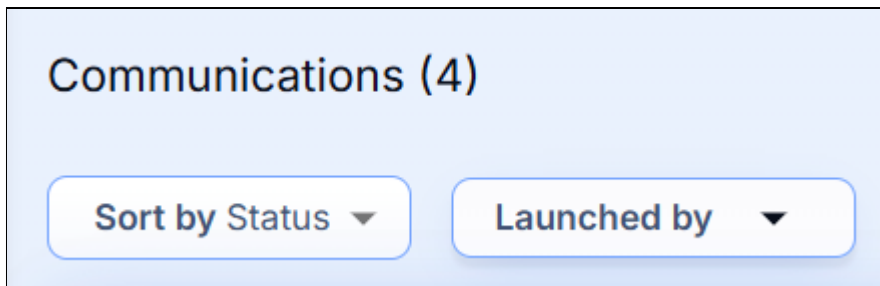
The **Communications** tab hosts any Communications, Incident Communications, and Notifications associated with a Response. Users can also attach Incident Templates, existing Incidents, and Scheduled Incidents to the Response from this tab using the **Add** button.



## Filtering and Sorting

Under **Communications**, users can sort and filter the following data points for ease of navigation:

- **Sort by** - Sort using one of the following criteria:
  - Last Updated
  - Launch Time
  - Status
  - First Added
- **Launched by** - Filter for items launched by a specific user.

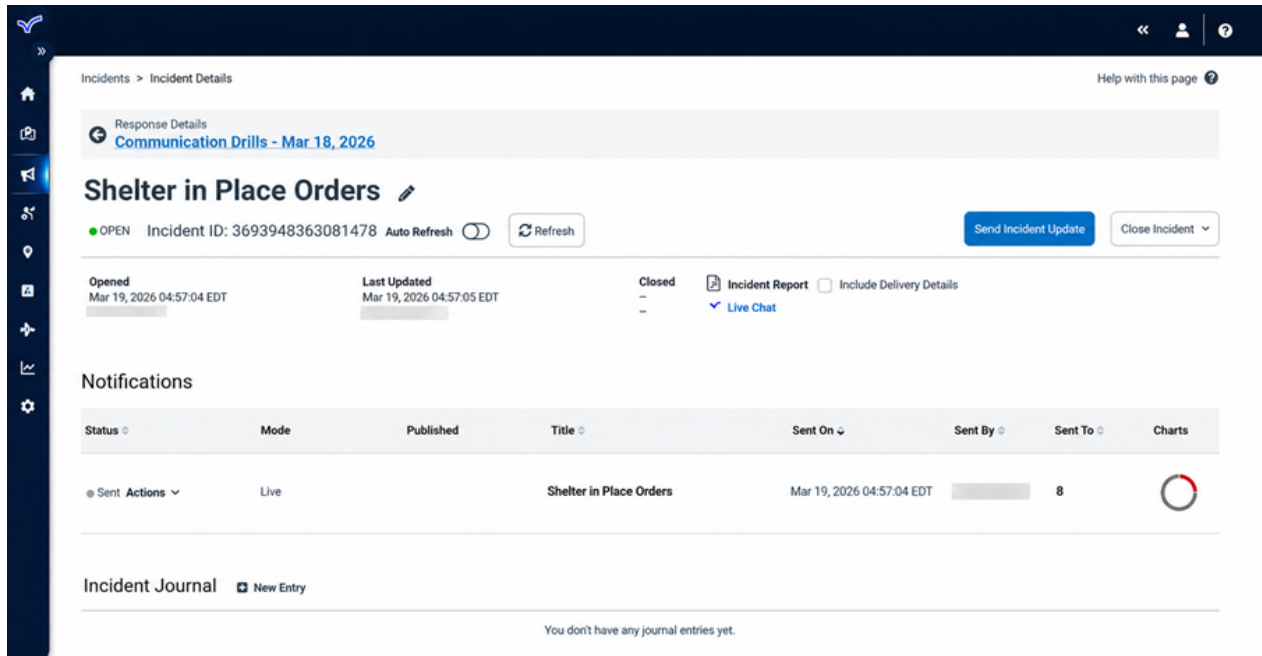


**NOTE:** Incidents will include an **Incidents** tag under the title in the list view to distinguish them from other Communications.

## Reviewing an Incident Communication

Click on an Incident Communication from the list to open its **Incident Details** page, which displays the following information:

- Incident Name
- Incident Status
- Incident ID
- Opened Date/Time
- Last Updated Date/Time
- Closed Date/Time



## Reviewing Notification Details

Click on one of the individual Notifications associated with the Incident Communication to open the **Notification Details** to drill down even further into its key details, such as Notification Type, Message, Start and End times, and more.

Incidents > Notification Details Help with this page ?

Response Details: Severe Thunderstorm Watch - California | Incident Details: Flatbush Ave & Farragut Rd - There are reports of a barricade situation in the area.

NOTIFICATION DETAILS: **Flatbush Ave & Farragut Rd - There are reports of a ...** Auto Refresh

◀ Sent Notification ID: 3243354754130965

**Status** Method

0 - Confirmed  
0 - Confirmed Late  
0 - Unreachable  
0 - Not Confirmed

**Details**

Notification Mode: Live  
 Notification Type: Standard  
 Imminent Threat to Life: No  
 Priority Greeting: No  
 Sent From: API  
 Start: Aug 11, 2025 16:01:46 EDT  
 End: Aug 11, 2025 17:01:46 EDT  
 Sent by:  
 Sent to: 1 contacts  
 Voice Recording: None  
 Message Format: Text  
 Escalation: No  
 Incident Subscribers: No  
 Incident Zone: No

**Message**

Flatbush Ave & Farragut Rd - There are reports of a barricade situation in the area. Response closed.

AM URL: <https://manager.dev.everbridge.net/sam/login/dev/ucstest/alerts/?alert=841688355a32-94bb-a801-d2cd22996d64>  
 Alert Link: <https://dev.successfactors.vcc-dev3.everbridge.net/?link=alert/841688355-a323-94bb-a801-d2cd22996d64>

**Delivery Details** Settings Incident Variables Operator Confirmation

Confirmed	Contact Name	Confirmed Method	Confirmed Method Value	Confirmation Time	First Attempt Time
+ N					

Page 1 of 1 25 View 1 - 1 of 1

[Print](#)

The bottom section of the page is broken into four tabs:

- **Delivery Details** - Displays the recipients' Confirmation, Contact Name, Confirmed Method, Confirmed Method Value, Confirmation Time, and Final Attempt Time. Click on a specific Contact to expand its details and see the number of Attempts, Delivery Method, Delivery Method Value, Call Result, and Attempt Time.

**Delivery Details** Settings Incident Variables Operator Confirmation

Confirmed	Contact Name	Confirmed Method	Confirmed Method Value	Confirmation Time	First Attempt Time
- N					

Attempt	Delivery Method	Delivery Method Value	Call Result	Attempt Time
0	Corporate Email		Not Attempted - Unsubscribed	

- **Settings** - Displays the settings used to send the Notification, such as Delivery Methods, Notification Duration, and more.

Delivery Details
Settings
Incident Variables
Operator Confirmation

**NOTIFICATION**

**Sender E-Mail Display:** EverbridgeEnterpriseAlerts

**Reply-to E-Mail:** [Redacted]

**Sender Caller ID:** United States: [Redacted]  
Brazil: [Redacted]  
United Kingdom: [Redacted]  
Afghanistan: [Redacted]

**Sender SMS ID:** Other countries  
United Kingdom: [Redacted]  
Albania: [Redacted]  
United Arab Emirates: [Redacted]  
Andorra: [Redacted]  
Antarctica: [Redacted]  
Aruba: [Redacted]  
Anguilla: [Redacted]  
Angola: [Redacted]  
Singapore: [Redacted]  
Saudi Arabia: [Redacted]  
Hong Kong: [Redacted]

**Enforce privacy:** No

**Delivery Order:** One Time Custom

**Delivery Methods:** 1. Personal Email 2  
2. Corporate Email  
3. PlainTextEmail+1Way  
4. Personal Phone SMS

**SMS Short URL:** Yes

**Override delivery method status and quiet time:** No

**Apply Voice Delivery Throttle Rules:** Yes

**Notification Duration:** 1 hr(s)

**Contact Cycles:** 1

**Cycle Interval:** 0 min(s)

**Delivery Method Interval:** 0 min(s)

**Voice Delivery PIN:** No

**Voicemail preference:** Message Only

**Confirm:** Yes

**Everbridge Mobile App Settings:** View

**Language:** English (US)

**Response Subscriptions:** No

**Invite these contacts to the incident chat:** Yes

[Print](#)

**CONTACT**

**Organization Contacts:** Group(s): -  
Rule(s): -

**Contact Polygon(s):**

- **Incident Variables** - Shows which Incident Variables were included in this Notification.

Delivery Details   Settings   **Incident Variables**   Operator Confirmation

**IncidentID:** 3243354754124985

**Message Title:** Flatbush Ave & Farragut Rd - There are reports of a barricade situation in the area.

**Message Body:** Message Body Text

**Today's Date:** 08-11-2025

**\_CEM Link to Alert Management:** <https://manager-dev3.everbridge.net/saml/login/dev3vccssotest/alerts/?alert=841d8a55-5a32-49a0-aa01-d2cd22996d64>

**VCC: Link to Alert:** <https://dev3.vccssotest.vcc-dev3.everbridge.net/?link=alert,841d8a55-5a32-49a0-aa01-d2cd22996d64>

**VCC: Alert Title:** Flatbush Ave & Farragut Rd - There are reports of a barricade situation in the area. Response closed.

[Print](#)

- **Operator Confirmation** - If Operator Confirmation is enabled for the Organization, then permitted operators can confirm on behalf of a Contact if they're unable to do so themselves.

Delivery Details   Settings   Incident Variables   **Operator Confirmation**

**SELECT AND CONFIRM FOR CONTACTS**  
Using the checkboxes in the table below, select and confirm for contacts

You are updating confirmation for 1 contacts   [Update Confirmation for Contacts](#)

[Refresh](#)   First Name   Last Name   [Reset](#)

<input checked="" type="checkbox"/>	Confirmed	Contact Name	External ID	First Attempt Time
<input checked="" type="checkbox"/>	N		m8529989728862712740	Sep 02, 2025 13:19:39 PDT

Page 1 of 1 25

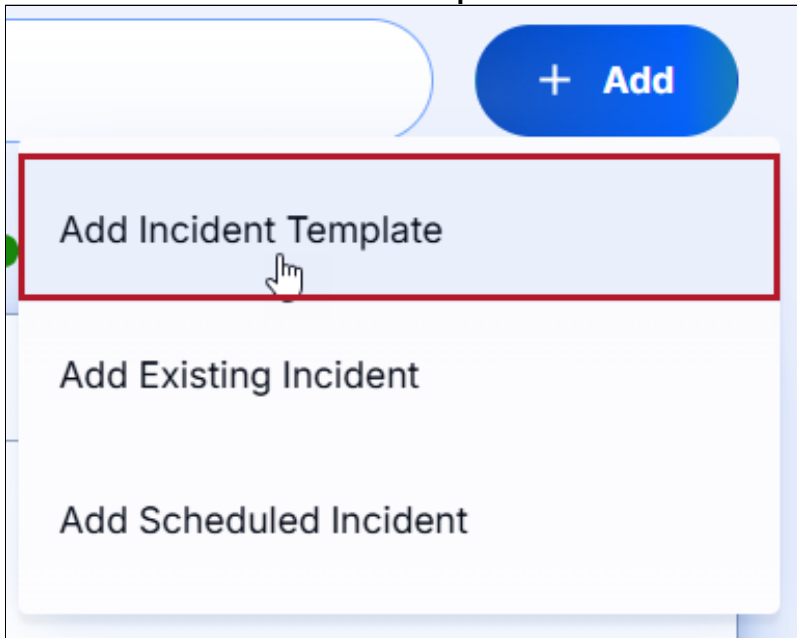
View 1 - 1 of 1

## Adding an Incident Template

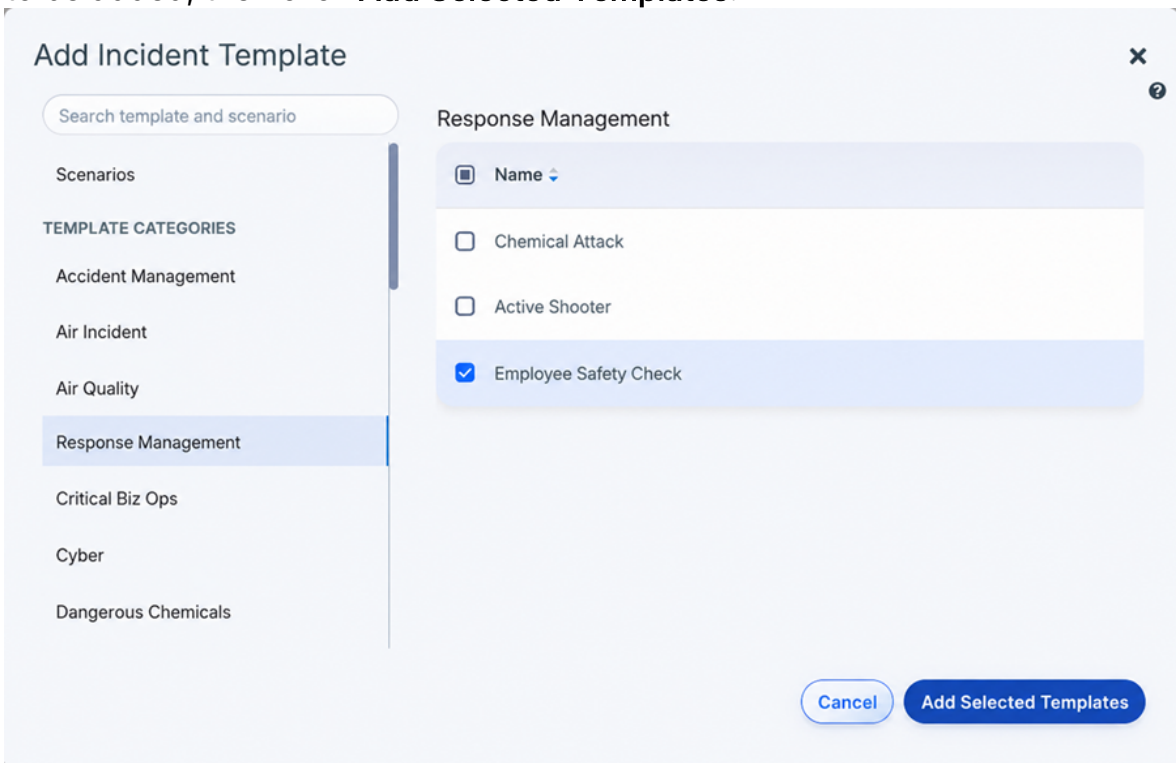
Additional Incident templates can be added to a Response after launch. To add another Incident template:

1. Select the Response from the **Response List**.
2. Open the **Communications** tab.

3. Click **Add > Add Incident Template**.



4. The **Add Incident Template** modal will open. Select any templates that need to be added, then click **Add Selected Templates**.

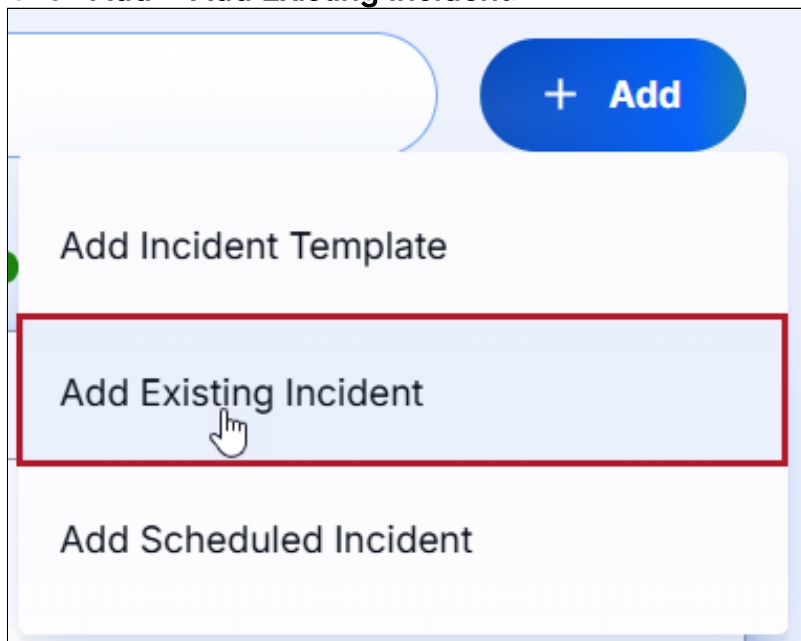


5. The newly-added template can then be launched from the **Communications** tab on the **Response Details** page.

## Adding an Existing Incident

If a Response should be associated with an existing Incident, it can be linked from the **Communications** subtab of the **Response Details** page. To do this:

1. Select the Response from the **Response List**.
2. Open the **Communications** tab.
3. Click **Add > Add Existing Incident**.



- The **Add Existing Incident** modal will open. Select any related Incidents that should be attached to the Response, then click **Add Selected Incidents**.

**Add Existing Incident**

Search

<input type="checkbox"/>	St...	Mode	Name	Open Duration	Opened On	Opened By	Last Updated...
<input type="checkbox"/>	Active	Live	US Highway 33 ...	0d 1h 33m 13s	Sep 02, 2025 1...		Sep 02, 2025 1...
<input type="checkbox"/>	Active	Live	NW 2nd Ave & ...	0d 1h 35m 31s	Sep 02, 2025 1...		Sep 02, 2025 1...
<input type="checkbox"/>	Active	Live	Rhoda Ave & Gr...	0d 1h 41m 10s	Sep 02, 2025 1...		Sep 02, 2025 1...
<input type="checkbox"/>	Active	Live	Rogers Ave & B...	0d 1h 44m 27s	Sep 02, 2025 1...		Sep 02, 2025 1...
<input type="checkbox"/>	Active	Live	SW 88th St & S...	0d 1h 45m 56s	Sep 02, 2025 1...		Sep 02, 2025 1...
<input type="checkbox"/>	Active	Live	Freeport Rd & M...	0d 1h 48m 31s	Sep 02, 2025 1...		Sep 02, 2025 1...
<input type="checkbox"/>	Active	Live	Bear Creek Blvd...	0d 1h 49m 27s	Sep 02, 2025 1...		Sep 02, 2025 1...
<input checked="" type="checkbox"/>	Active	Live	12th St S & 67t...	0d 1h 53m 23s	Sep 02, 2025 1...		Sep 02, 2025 1...
<input type="checkbox"/>	Active	Live	E Palm Dr & SE ...	0d 1h 54m 5s	Sep 02, 2025 1...		Sep 02, 2025 1...
<input type="checkbox"/>	Active	Live	New Ln & Antho...	0d 1h 58m 4s	Sep 02, 2025 1...		Sep 02, 2025 1...

View 1 - 10 of 75043 < 1 2 3 4 5 ... 7505 > 10 / page

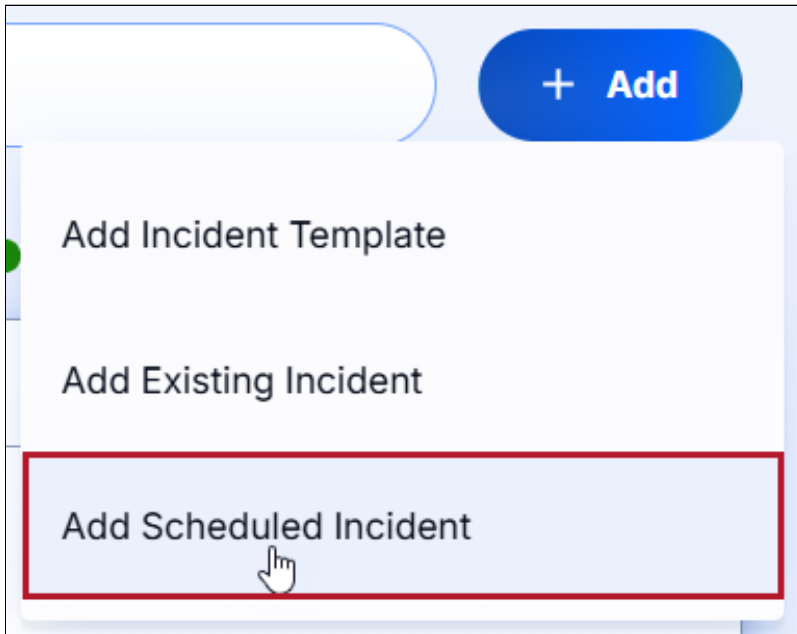
- The newly-added Incident will now appear in the **Communications** list on the **Response Details** page, where it can be monitored, updated or closed as needed.

## Adding a Scheduled Incident

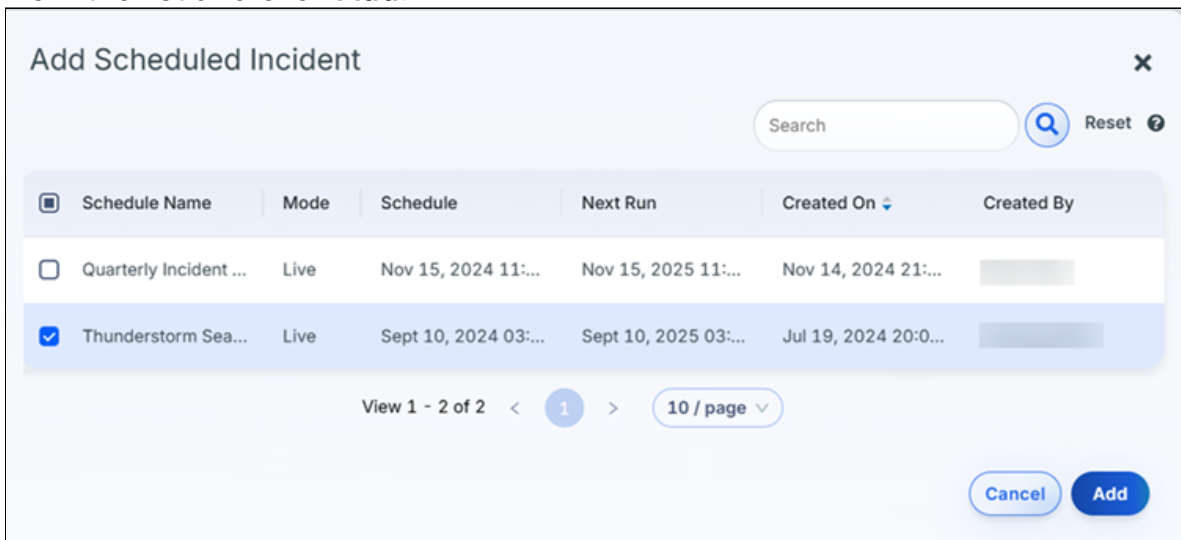
Users can add a Scheduled Incident to a Response after it's been launched. To do this:

- Select the Response from the **Response List**.
- Open the **Communications** tab.

3. Click **Add > Add Scheduled Incident**.



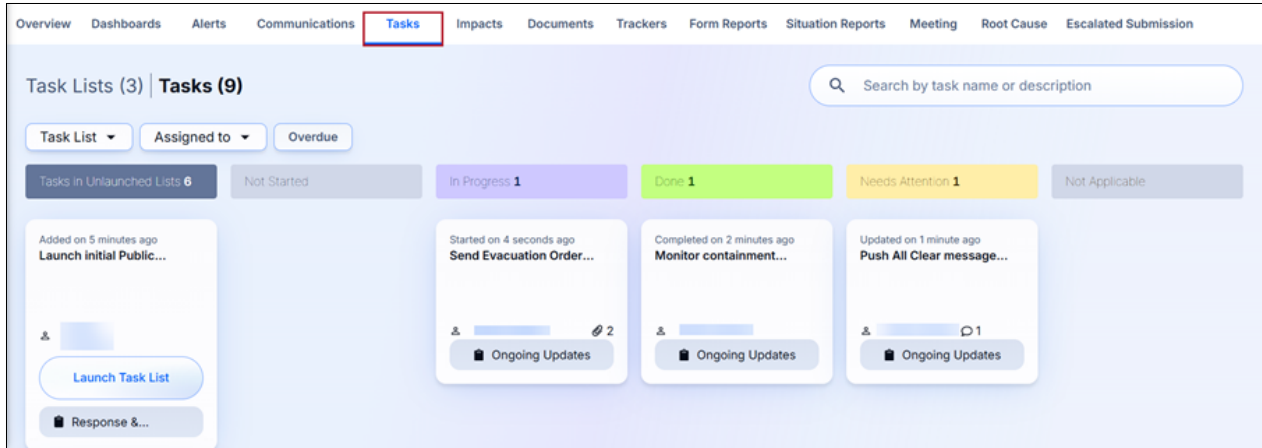
4. The **Add Scheduled Incident** modal will open. Select a Scheduled Incident from the list and click **Add**.



5. The newly-added Scheduled Incident will now appear in the **Incident Communications** list with the **Scheduled** status.

## Tasks Tab

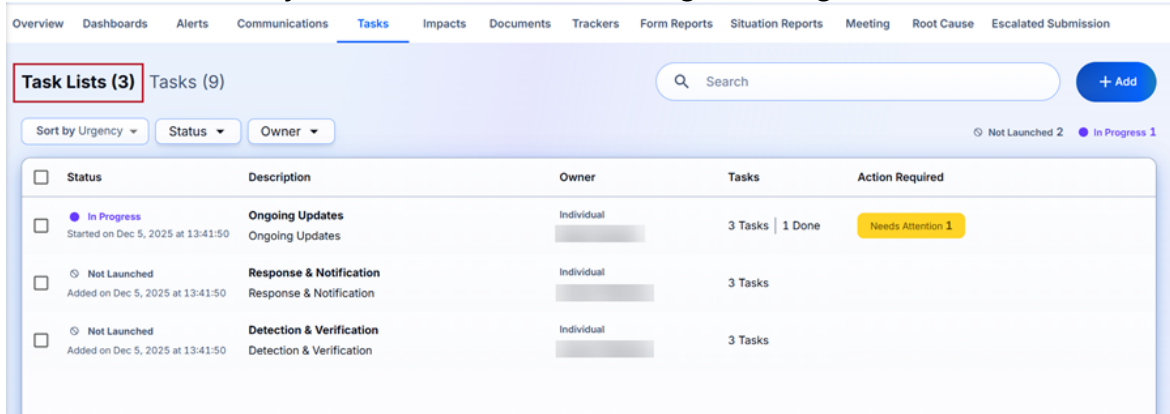
Click the **Tasks** tabs to monitor any Task Lists associated with this Response. Note that while Everbridge 360 Responses currently uses the Classic Everbridge Responses framework for creating Task Lists, existing Task Lists attached to a Response can be managed using the **Tasks** tab's interactive kanban board on the **Response Details** page.



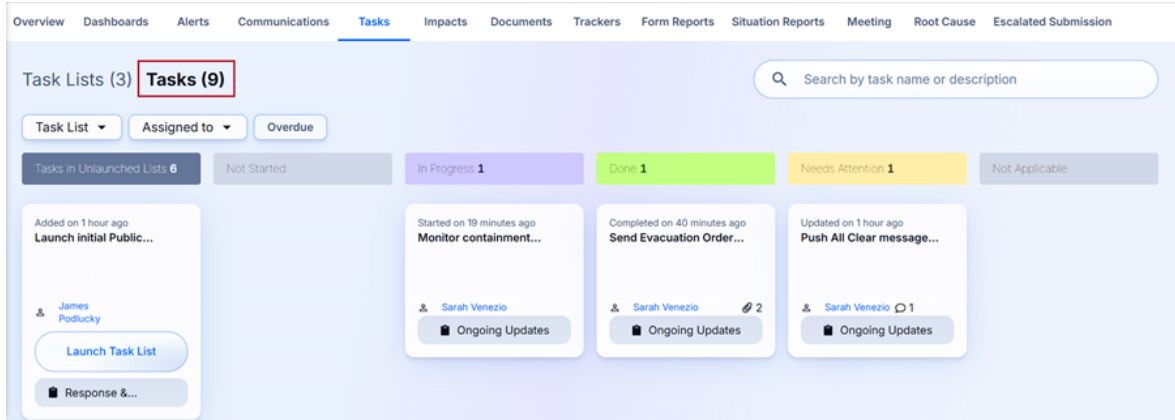
**NOTE:** See the **Task List Templates** section in the [Response Management User Guide](#) for more details on creating and maintaining Task List Templates via the Classic Response Management interface.

The **Tasks** tab is divided into two subtabs:

- **Task Lists Subtab** - Displays all Task Lists associated with this Response, including their status, description, owner, Task count and completion status, and if there are any Tasks marked as needing Needing Attention.

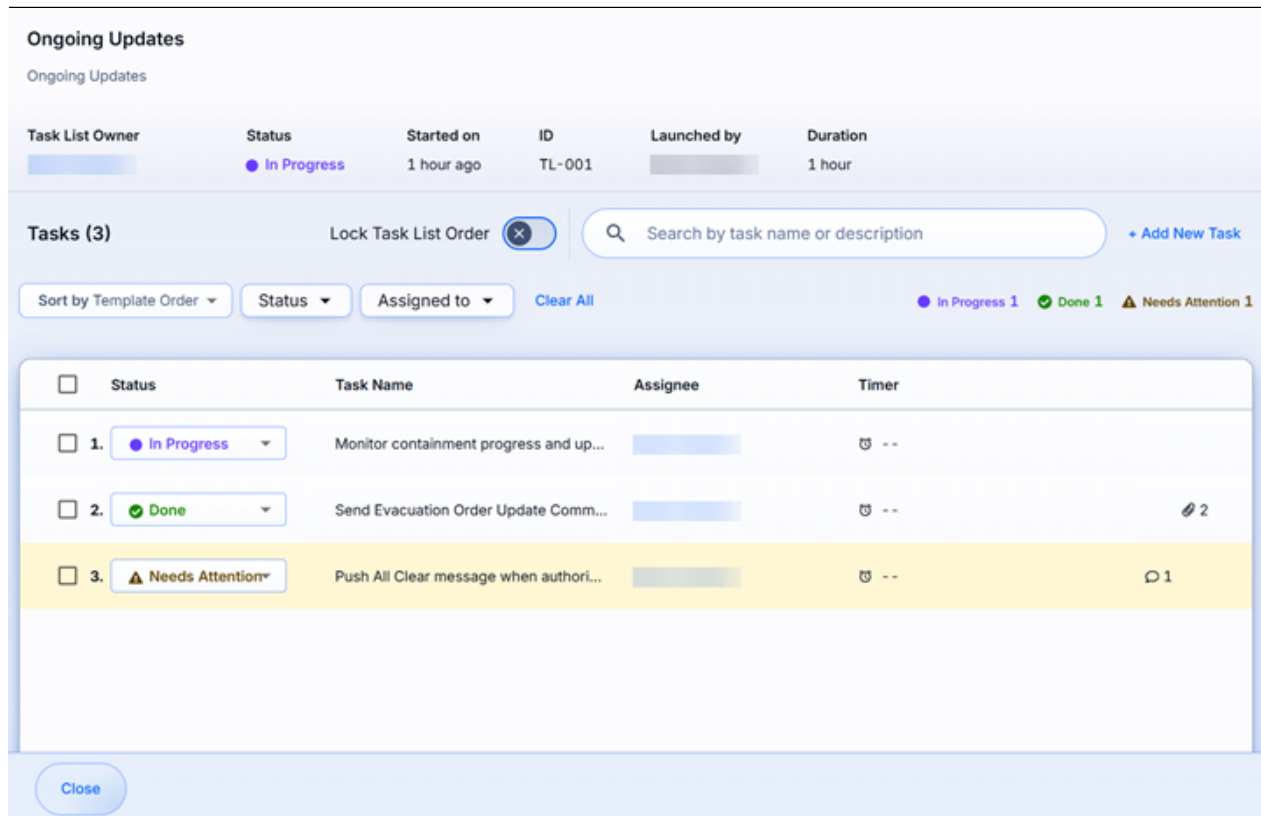


- **Tasks Subtab** - Displays all Tasks associated with this Response using an interactive status-based kanban board, including their owner, parent Task List, and attachment and comment count indicators.



## Task Lists Subtab

The **Task Lists** subtab contains any Task Lists associated with this Response. Click on a Task List to open its details, which include its status, individual Tasks, start time, duration, and more.



Selecting the checkbox for a Task Template reveals the options to remove the Task List from the Response or assign an owner.

The screenshot shows the 'Tasks Lists' subtab in the Everbridge interface. At the top, there are navigation tabs: Overview, Dashboards, Alerts, Communications, **Tasks**, Impacts, Documents, Trackers, Form Reports, Situation Reports, Meeting, Root Cause, and Escalated Submission. Below the navigation, the page title is 'Task Lists (3) | Tasks (9)'. There is a search bar and an '+ Add' button. Below the search bar, there are filters for 'Sort by Urgency', 'Status', and 'Owner'. On the right, there are status indicators: 'Not Launched 1', 'Not Started 1', and 'In Progress 1'. Below the filters, there are two buttons: 'Remove Task List' and 'Assign Owner'. The main content is a table with the following columns: Status, Description, Owner, Tasks, and Action Required.

Status	Description	Owner	Tasks	Action Required
<input checked="" type="checkbox"/> In Progress Started on Dec 5, 2025 at 13:41:50	<b>Ongoing Updates</b> Ongoing Updates	Individual	3 Tasks   1 Done	Needs Attention 1
<input type="checkbox"/> Not Started Launched on Dec 5, 2025 at 15:5...	<b>Response &amp; Notification</b> Response & Notification	Individual	3 Tasks	
<input checked="" type="checkbox"/> Not Launched Added on Dec 5, 2025 at 13:41:50	<b>Detection &amp; Verification</b> Detection & Verification	Individual	3 Tasks	

## Launching a Templated Task List

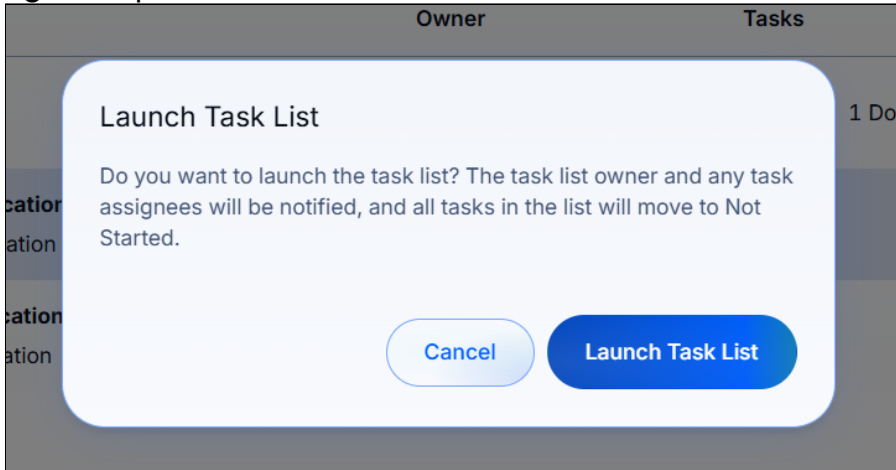
Many Task Lists will be configured to auto-launch as soon as a Response is sent using a template that include them, while others will need to be manually launched from the **Tasks Lists** subtab, instead.

To manually launch a Task List that was inherited from a Response template:

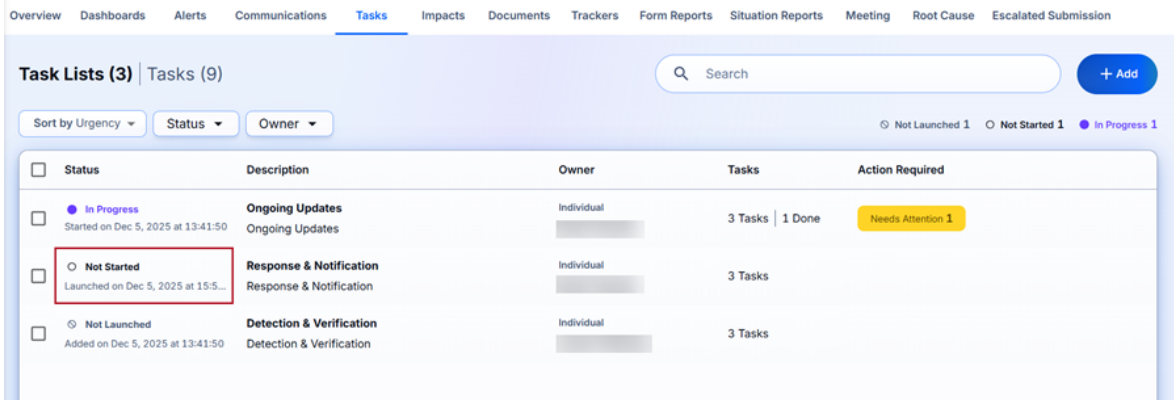
1. Review the unlaunched Task List from the **Task Lists** subtab and make any needed changes before launching, such as updating the owner or adjusting timers.
2. Hover the cursor over the unlaunched Task List.
3. Click the kebab menu button to the right and select **Launch Task List**.

This screenshot is similar to the one above, but it highlights the context menu for an unlaunched task list. The 'Not Launched' task list 'Detection & Verification' is selected. A context menu is open, showing two options: 'Launch Task List' and 'Remove Task List from Event'. The 'Launch Task List' option is highlighted with a red box.

- The **Launch Task List** confirmation modal will appear. Click **Launch Task List** again to proceed.



- The Task List will be launched, and the status for the Task List (and all Tasks it contains) will be updated from **Not Launched** to **Not Started**. The Task List owner and Task assignees will be notified that they have new Tasks assigned to them.



**NOTE:** A Task List can also be launched from the **Tasks** subtab by clicking the **Launch Task List** button on its kanban tile, which can be found in the

## Tasks in Unlaunched Lists column to the far left.

The screenshot shows the 'Tasks' subtab in the Everbridge interface. At the top, there are navigation tabs: Overview, Dashboards, Alerts, Communications, **Tasks**, Impacts, Documents, Trackers, Form Reports, Situation Reports, Meeting, Root Cause, and Escalated Submission. Below the navigation, there's a search bar and filters for 'Task List', 'Assigned to', and 'Overdue'. A status bar shows: 'Tasks in Unlaunched Lists 6', 'Not Started', 'In Progress 1', 'Done 1', 'Needs Attention 1', and 'Not Applicable'. The main area displays three task cards. The first card, 'Launch initial Public...', is highlighted with a red box around its 'Launch Task List' button. Other cards include 'Send Evacuation Order...' and 'Monitor containment...'. Each card has an 'Ongoing Updates' button.

## Adding a Task List to a Response

In addition to the Task Lists inherited from the Response Template, users can also add Task Lists to a launched Response from either the Task List Library or as an ad-hoc list. To do this:

1. On the **Task Lists** subtab, click the **Add** button.

The screenshot shows the 'Task Lists' subtab in the Everbridge interface. At the top, there are navigation tabs: Overview, Dashboards, Alerts, Communications, **Tasks**, Impacts, Documents, Trackers, Form Reports, Situation Reports, Meeting, Root Cause, and Escalated Submission. Below the navigation, there's a search bar and filters for 'Sort by Urgency', 'Status', and 'Owner'. A red box highlights the '+ Add' button in the top right corner. Below the filters, there are two options: 'Add Task List from Library' and 'Add Manual Task List'. The main area displays a table with columns: Status, Description, Owner, Tasks, and Action Required. The table contains three rows of task lists.

Status	Description	Owner	Tasks	Action Required
<span style="color: blue;">●</span> In Progress	Ongoing Updates Ongoing Updates	Individual	3 Tasks   1 Done	Needs Attention 1
<span style="color: gray;">○</span> Not Started	Response & Notification Response & Notification	Individual	3 Tasks	
<span style="color: gray;">○</span> Not Launched	Detection & Verification Detection & Verification	Individual	3 Tasks	

2. Select either:
  - **Add Task List from Library** - Choose an existing Task List from the Organization's Task List Templates library. The selected Task List will be added to the Response.
  - **Add Manual Task List** - Create a new ad-hoc Task List for this Response.
3. If creating a Manual Task List:

- a. Add a name and description for the Task List.

Add Manual Task List

**Name**  
 Check with Stakeholders 23 / 800

**Description**  
 Check in with any stakeholders for a status report and escalate as needed.  
74 / 2500

Owner

Tasks + Add Task

Task Name	Assigned To	Timer

Close Add Add and Launch

- b. Select an owner for the Task List.
- c. Under **Tasks**, click **Add Task**.

Add Manual Task List

**Description**  
74 / 2500

Owner  
 Sarah Venezia

Tasks + Add Task

Task Name	Assigned To	Timer
Add tasks to create the list <span style="border: 1px solid red; padding: 2px;">+ Add Task</span>		

Close Add Add and Launch

- d. The **Add New Task** modal will open. Give the new Task a fitting name and clear description.

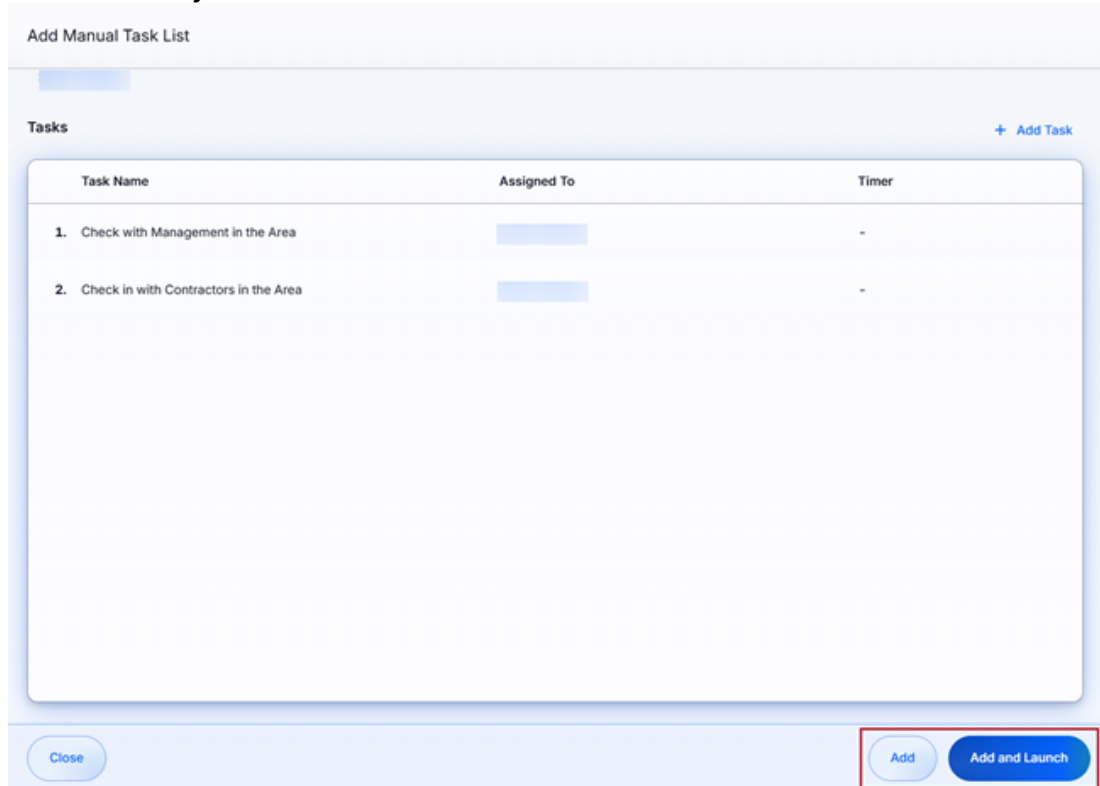
- e. Optionally, set an assignee for the Task if it should be handled by someone other than the Task List Owner.
- f. Add up to four attachments to the Task, if needed.

- g. If this Task is particularly time-sensitive, click the **Timer** toggle to configure either a **Relative Timer** or **Date Timer**.

The screenshot shows the 'Add New Task' dialog box. At the top, there is a 'Timer' toggle switch which is turned on and highlighted with a red box. Below this, the 'Type' section has two radio buttons: 'Relative' (selected) and 'Date'. The '\* Completion Time' section has two input fields: 'Hours' with the value '0' and 'Minutes' with the value '30'. The 'Escalation' section has three radio buttons: 'None', 'Task List Owner' (selected), and 'Custom Selection'. The 'Timer Notification' section has a checked checkbox for 'Notify task assignee'. At the bottom right, there are 'Cancel' and 'Add' buttons.

- h. Set the **Completion Time** to indicate when the Task is due.
- For **Relative Timers**, enter the hours and minutes after the Task List has been launched.
  - For **Date Timers**, enter a specific date and time that the Task will be due.
- i. Under **Escalation**, choose who should be notified if this Task isn't completed within the Completion Time:
- None
  - Task List Owner
  - Custom Selection
- j. Select the **Notify task assignee** checkbox to inform the assignee that a Timer has been created for their assigned Task.
- k. Click **Add**.
4. Repeat the above process until all of the necessary Tasks have been created.
5. Once done, select either:
- **Add** - Adds the new Task List to the Response without launching.

- **Add and Launch** - Adds the new Task List to the Response and automatically launches it.



6. The new Task List will now appear under the **Task Lists** subtab.

### Managing Task Lists

Click on a Task List to review and manage its progress as a whole, as well as its individual contained Tasks.

**Ongoing Updates**  
Ongoing Updates

Task List Owner: [User] Status: ● In Progress Started on: 1 hour ago ID: TL-001 Launched by: [User] Duration: 1 hour

**Tasks (3)** Lock Task List Order  Search by task name or description [+ Add New Task](#)

Sort by Template Order ▾ Status ▾ Assigned to ▾ Clear All ● In Progress 1 ✔ Done 1 ⚠ Needs Attention 1

<input type="checkbox"/>	Status	Task Name	Assignee	Timer
<input type="checkbox"/>	1. <span style="color: purple;">●</span> In Progress ▾	Monitor containment progress and up...	[User]	⌚ --
<input type="checkbox"/>	2. <span style="color: green;">✔</span> Done ▾	Send Evacuation Order Update Comm...	[User]	⌚ -- <span style="font-size: small;">✎ 2</span>
<input type="checkbox"/>	3. <span style="color: orange;">⚠</span> Needs Attention ▾	Push All Clear message when autori...	[User]	⌚ -- <span style="font-size: small;">💬 1</span>

[Close](#)

### Filtering the Task Lists Subtab

The **Task Lists** subtab can be filtered using the following data points, making it easy to locate the necessary list.

- **Status** (Not Launched, Not Started, In Progress, Done)

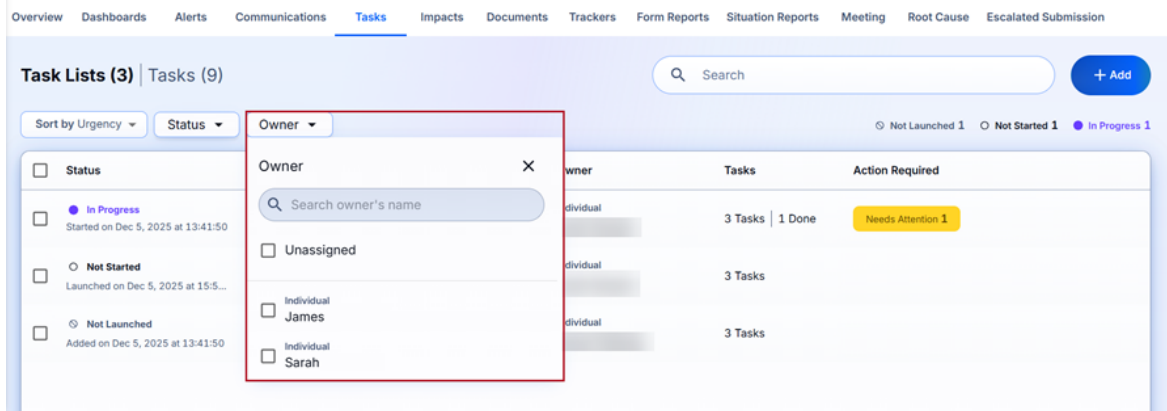
Overview Dashboards Alerts Communications **Tasks** Impacts Documents Trackers Form Reports Situation Reports Meeting Root Cause Escalated Submission

**Task Lists (3)** | Tasks (9) Search [+ Add](#)

Sort by Urgency ▾ Status ▾ Owner ▾ ⊙ Not Launched 1 ⊙ Not Started 1 ● In Progress 1

<input type="checkbox"/>	Status	Task Name	Owner	Tasks	Action Required
<input type="checkbox"/>	<span style="color: purple;">●</span> In Progress	Updates	Individual	3 Tasks   1 Done	<span style="background-color: orange; color: white; padding: 2px;">Needs Attention 1</span>
<input type="checkbox"/>	<span style="color: grey;">⊙</span> Not Started	& Notification	Individual	3 Tasks	
<input type="checkbox"/>	<span style="color: grey;">⊙</span> Not Launched	& Verification	Individual	3 Tasks	

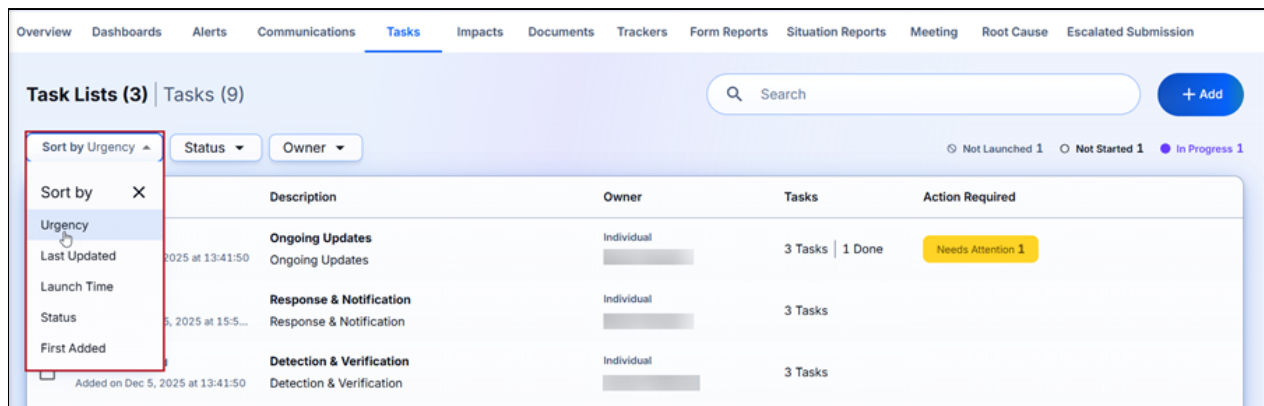
- **Owner (Unassigned or specific User)**



### Sorting the Task Lists Subtab

In addition to filtering, the **Task Lists** subtab can also be sorted using the following data points:

- Urgency
- Last Updated
- Launch Time
- Status
- First Added



### Assigning Tasks in Bulk from the Task Lists Subtab

Tasks within a Task List can be bulk assigned to a user, removing the hassle of needing to go Task-by-Task. To do this:

1. Choose the desired Task List from the **Task Lists** subtab.

2. Select the checkboxes for the Tasks that need to be assigned.

Ongoing Updates

Ongoing Updates

Task List Owner	Status	Started on	ID	Launched by	Duration
	In Progress	3 hours ago	TL-001		3 hours

Tasks (3) Lock Task List Order  Search by task name or description  + Add New Task

Sort by Template Order Status Assigned to Clear All In Progress 1 Done 1 Needs Attention 1

Remove Tasks Update Assignee Update Status Add Timer

<input checked="" type="checkbox"/>	Status	Task Name	Assignee	Timer
<input checked="" type="checkbox"/>	In Progress	Monitor containment progress and up...	Sarah	--
<input checked="" type="checkbox"/>	Done	Send Evacuation Order Update Comm...	Sarah	-- 2
<input checked="" type="checkbox"/>	Needs Attention	Push All Clear message when autori...	Sarah	-- 1

Close

3. Click Update Assignee.

Ongoing Updates

Ongoing Updates

Task List Owner	Status	Started on	ID	Launched by	Duration
	In Progress	3 hours ago	TL-001		3 hours

Tasks (3) Lock Task List Order  Search by task name or description  + Add New Task

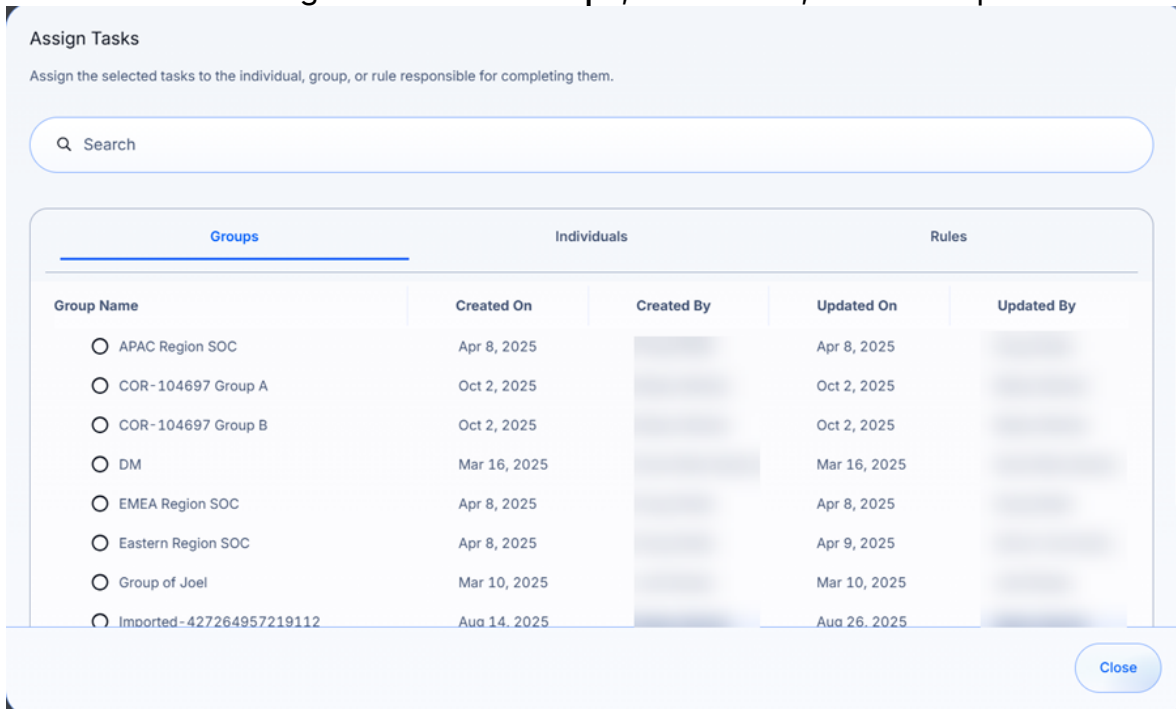
Sort by Template Order Status Assigned to Clear All In Progress 1 Done 1 Needs Attention 1

Remove Tasks Update Assignee Update Status Add Timer

<input checked="" type="checkbox"/>	Status	Task Name	Assignee	Timer
<input checked="" type="checkbox"/>	In Progress	Monitor containment progress and up...	Sarah	--
<input checked="" type="checkbox"/>	Done	Send Evacuation Order Update Comm...	Sarah	-- 2
<input checked="" type="checkbox"/>	Needs Attention	Push All Clear message when autori...	Sarah	-- 1

Close

- Select the new assignees via the **Groups**, **Individuals**, and **Rules** pickers.

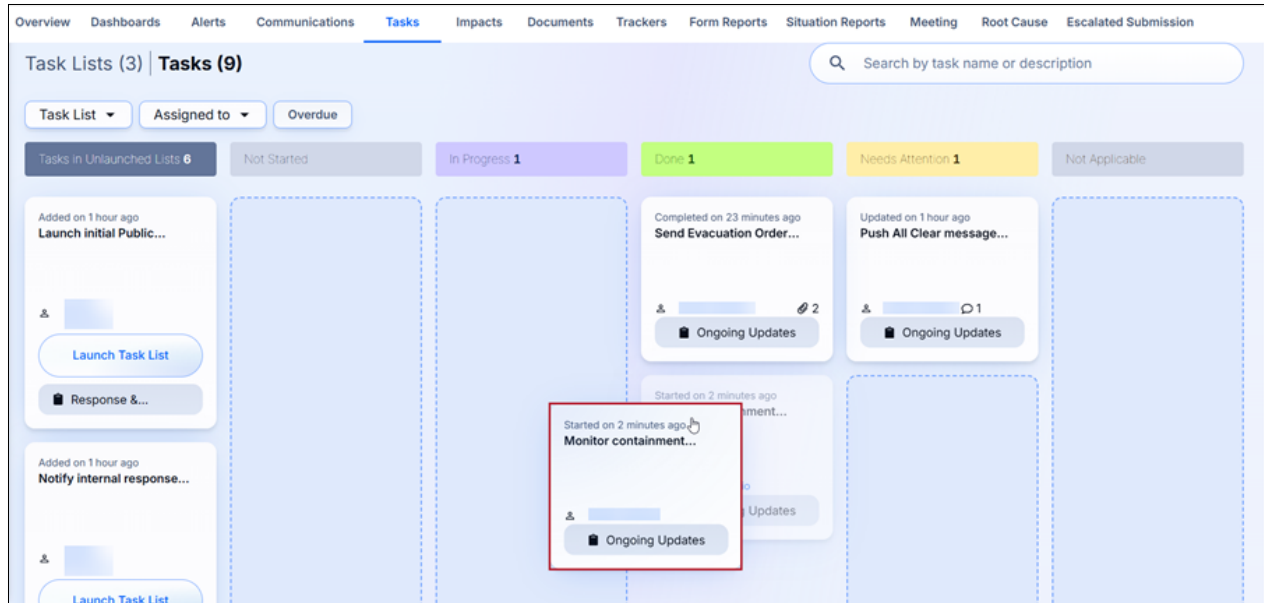


- Once a new assignee is chosen, the assignee for each selected Task will be automatically updated.

## Tasks Subtab

The kanban board on the Tasks subtab provides an intuitive visual display of all of the Tasks associated with this Response. It's divided into the following status columns, where Tasks can be dragged to and from as needed to update their status:

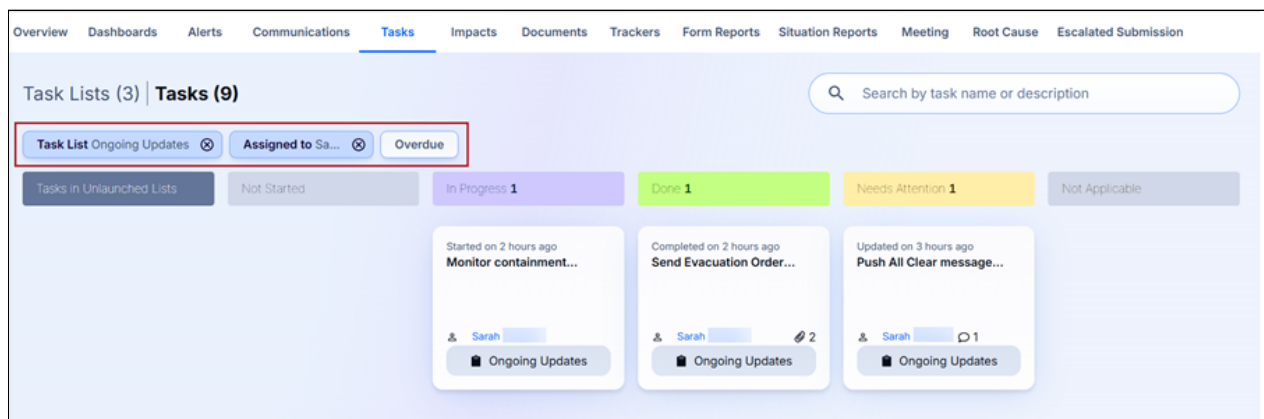
- **Tasks in Unlaunched Lists** - Tasks that are included in unlaunched Task Lists.
- **Not Started** - Tasks included in a launched Task List that haven't been started, yet.
- **In Progress** - Tasks included in a launched Task List that are currently in progress.
- **Done** - Tasks included in a launched Task List that have been marked as completed.
- **Needs Attention** - Tasks included in a launched Task List that require manual review or intervention. The user will be prompted to leave a comment when updating to this status detailing what kind of attention is required and why.



### Filtering the Kanban Board

Users can apply the following Task filters to make it easier to find the needed Task:

- **Task List** - Filters for Tasks within a specific Task List.
- **Assigned to** - Filters for either unassigned Tasks or those assigned to a certain Individual, Group, or Rule.
- **Overdue** - Filters for Tasks that have exceeded the duration of their set timers.



### Updating a Task's Status

The status for a Task can be updated both from the kanban board under the **Tasks** tab, or from here on the **Task List Details** tab. To update it from the **Task List Details** tab:

1. Click the **Status** button for the desired task.
2. Choose the appropriate status from the dropdown menu.

The screenshot shows the 'Ongoing Updates' section with a task list. The task list has three tasks. The second task, 'Send Evacuation Order Update Comm...', has its status dropdown menu open, showing options: 'In Progress' (selected), 'Not Started', 'Done', 'Needs Attention', and 'Not Applicable'. The status totals on the right show 'In Progress 1', 'Done 1', and 'Needs Attention 1'.

Task List Owner	Status	Started on	ID	Launched by	Duration
	In Progress	58 minutes ago	TL-001		59 minutes

Status	Task Name	Assignee	Timer
1. Done	Monitor containment progress and up...		--
2. In Progress	Send Evacuation Order Update Comm...		--
3. In Progress	Push All Clear message when autori...		--

3. The Task List will reload and now display the updated status for the Task. The status totals on the right will also be updated to reflect the change.

The screenshot shows the 'Ongoing Updates' section with the same task list. The second task, 'Send Evacuation Order Update Comm...', now has its status updated to 'Done'. The status totals on the right are updated to 'Done 2' and 'Needs Attention 1'.

Task List Owner	Status	Started on	ID	Launched by	Duration
	In Progress	1 hour ago	TL-001		1 hour

Status	Task Name	Assignee	Timer
1. Done	Monitor containment progress and up...		--
2. Done	Send Evacuation Order Update Comm...		--
3. Needs Attention	Push All Clear message when autori...		--

## Reviewing Task Details

Click on an individual Task to review its key details, including its status, assignee, comments, attachments, parent Task List, and more. From here, users can also update the Task status, attach files, add comments, and reassign the Task to another user.

The screenshot shows the task details for "Push All Clear message when authorized by Fire Command". At the top, the status is "Needs Attention". Below this, there are sections for Attachments (0), Comments (1), and Activity. The Activity section shows a timeline of events: "Status Updated to Needs Attention", "Comment Added", "Reassigned to Sarah Venezia", "Completed", and "Launched".

Status	Assigned To	Timer	Task ID	Duration
Needs Attention	[Redacted]	--	6933519e2cc99f5a261b3600	--

**Attachments (0)**  
No attachments added  
[Attach Files](#)

**Comments (1)**  
SV 28 minutes ago, by [Redacted] >  
Awaiting confirmation that the All Clear has been established.  
[Add Comment](#)

**Activity**

- Status Updated to Needs Attention**  
Dec 05, 2025 at 13:45 by [Redacted]  
New Status: Needs Attention  
Previous Status: Completed
- Comment Added**  
Dec 05, 2025 at 13:45 by [Redacted]
- Reassigned to Sarah Venezia**  
Dec 05, 2025 at 13:44 by [Redacted]  
New Assignee: Sarah Venezia
- Completed**  
Dec 05, 2025 at 13:44 by [Redacted]
- Launched**  
Dec 05, 2025 at 13:43 by [Redacted]

[Close](#)

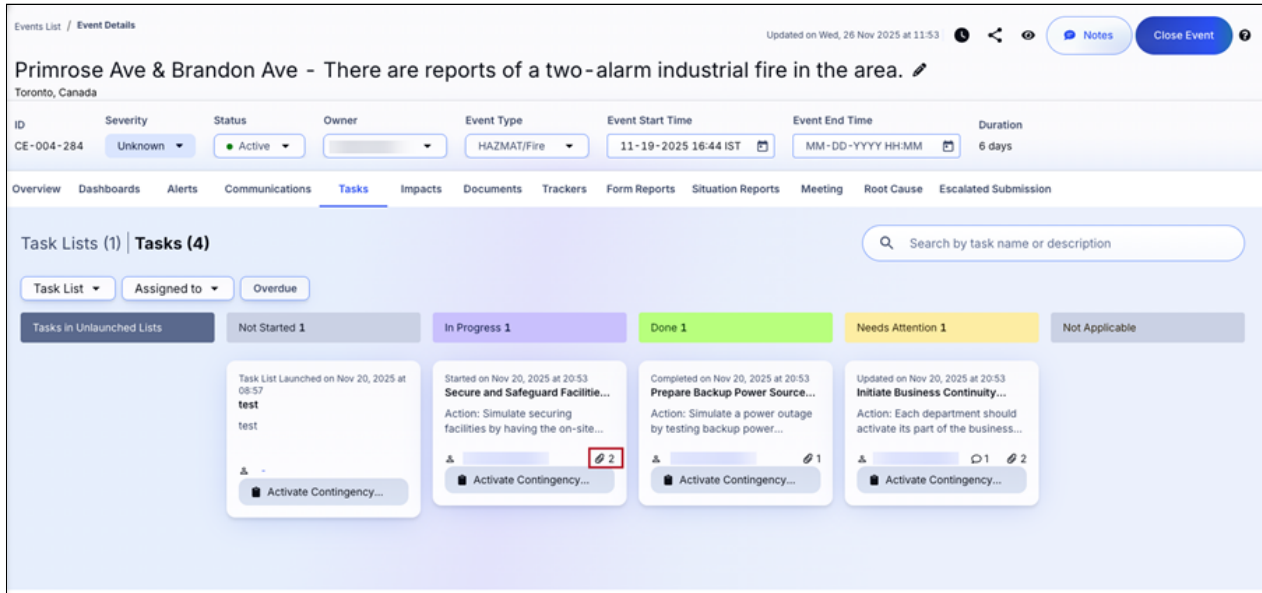
## Updating Task Status

Individual Tasks each have their own statuses, which are then sorted into the following columns on the Tasks tab's kanban board:

- **Tasks in Unlaunched Lists** - Tasks that are included in unlaunched Task Lists.
- **Not Started** - Tasks included in a launched Task List that haven't been started, yet.
- **In Progress** - Tasks included in a launched Task List that are currently in progress.
- **Done** - Tasks included in a launched Task List that have been marked as completed.
- **Needs Attention** - Tasks included in a launched Task List that require manual review or intervention. The user will be prompted to leave a comment when updating to this status detailing what kind of attention is required and why.

## Task Item Attachments

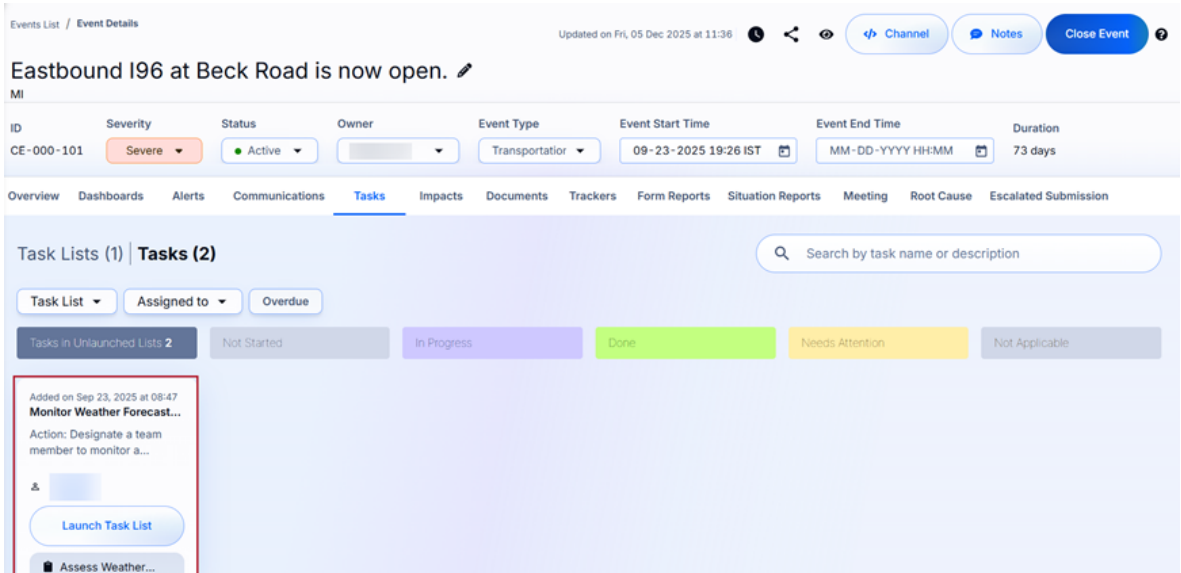
In Everbridge 360 Responses, individual Tasks within a Task List or Task List Template can include up to four attachments, which are supported across both the **Response Templates** and **Task List Templates** pages. The total number of files attached to a Task are displayed in the bottom-right corner of its tile under the **Tasks** tab of the **Responses Details** page.



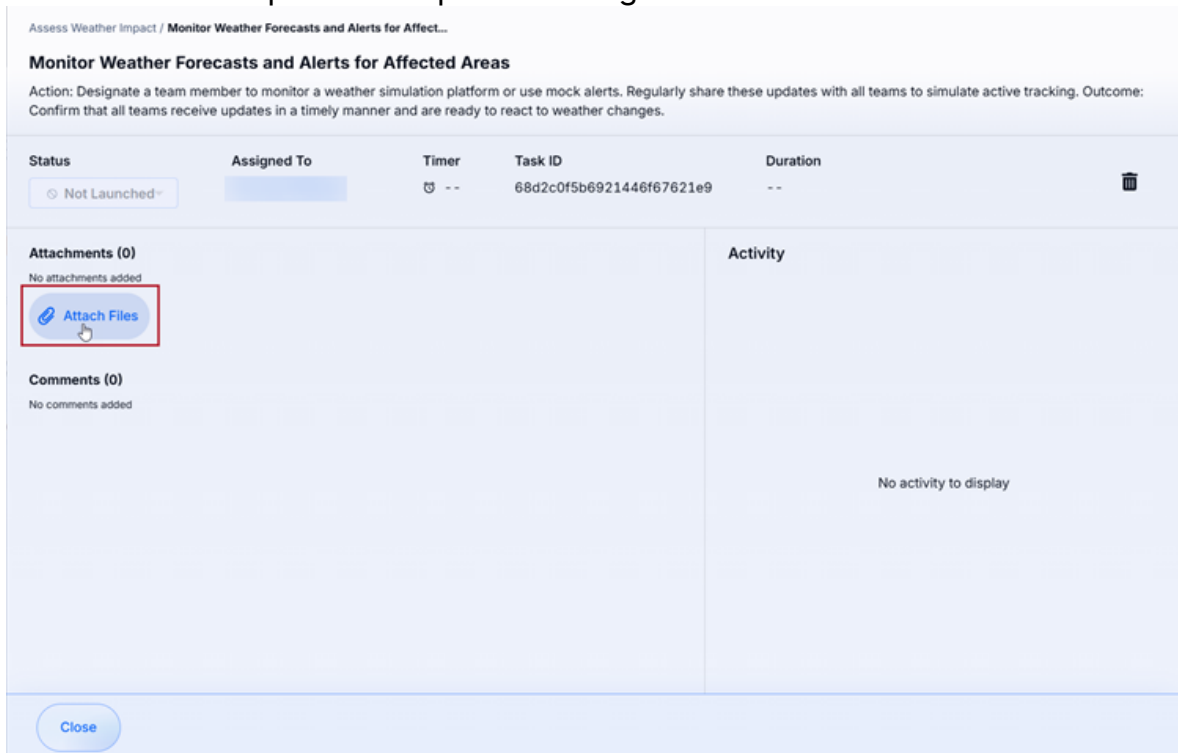
## Adding an Attachment to a Task

Attachments can be added to a Task directly from the **Response Details** page. To do this:

1. Click the desired Task from the **Tasks** tab.



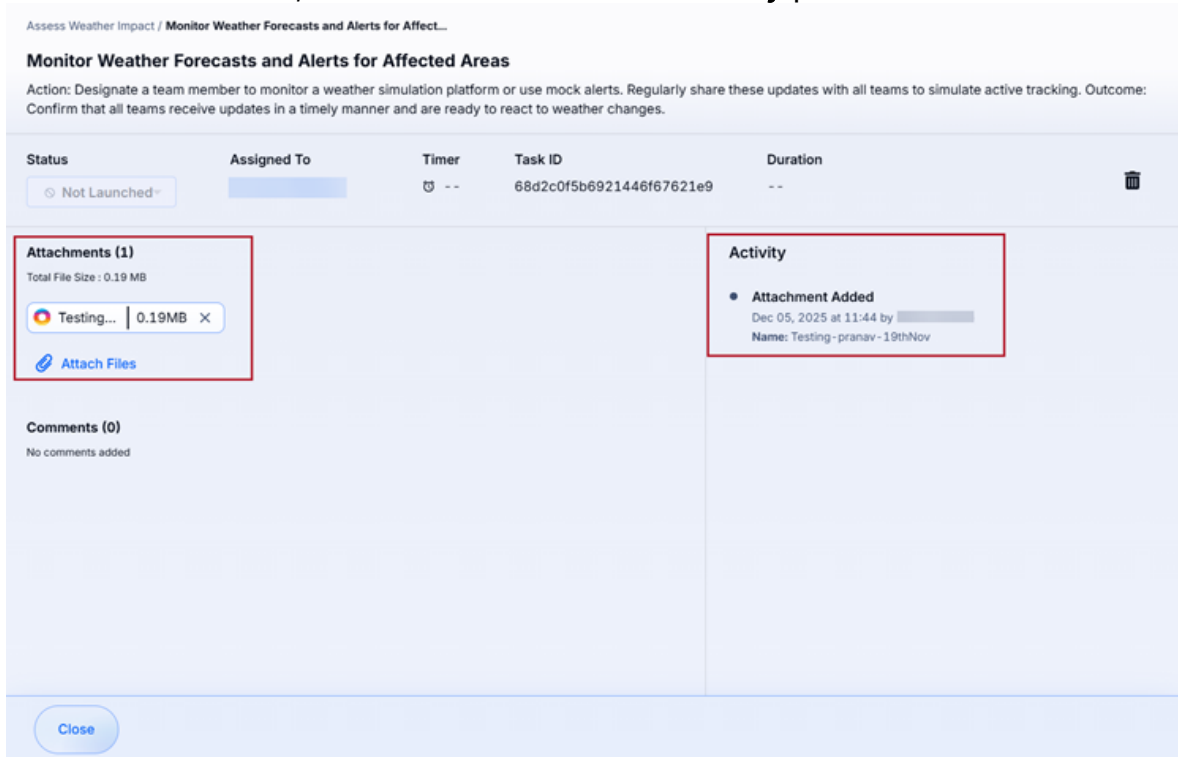
2. The **Task Details** panel will open to the right. Click **Attach Files**.



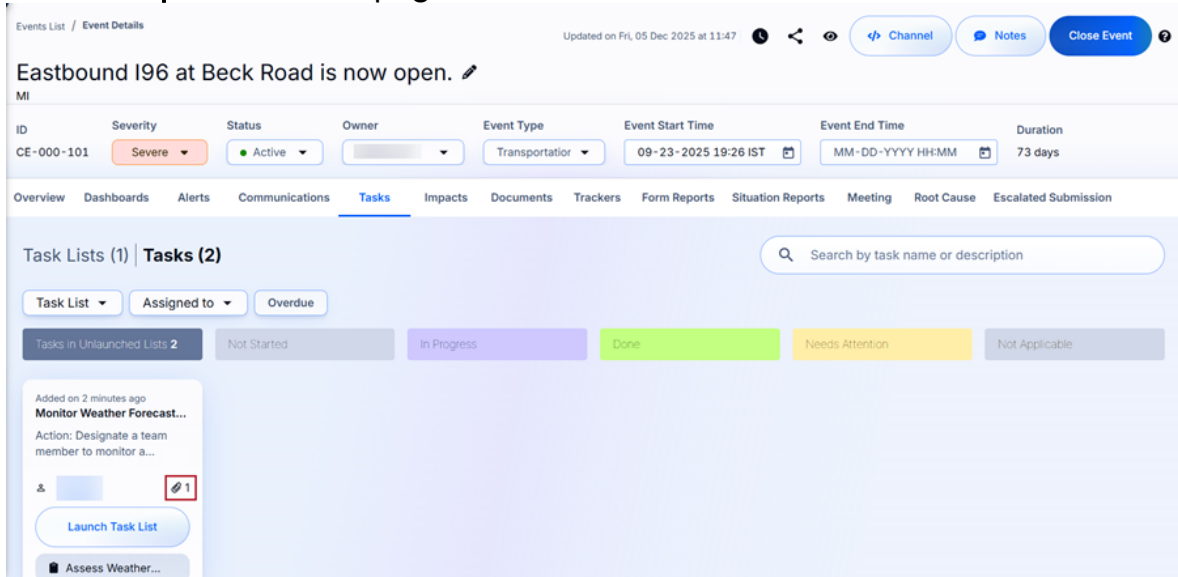
3. Select either:

- **Add from Documents Library** - Allows the user to select an existing file from the Organization's Documents Library.
- **Add from Your Computer** - Allows the user to select a new file from their device.

- Once the attachment has been selected, it'll appear on the Task Details page under Attachments, as well as in the Task's Activity panel. Click **Close**.

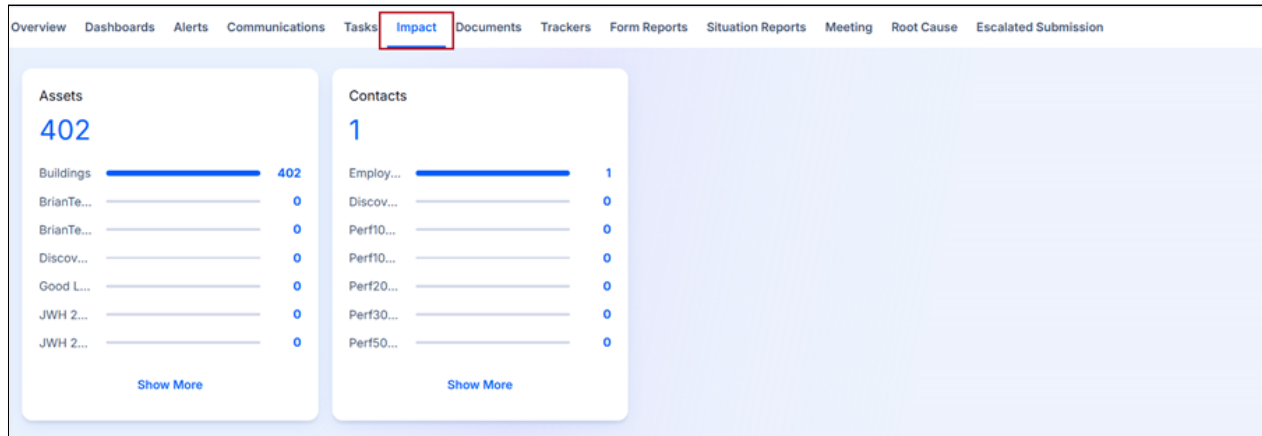


- The Task's updated attachment count will now be reflected on the **Tasks** tab of the **Response Details** page.



## Impact Tab

The **Impact** tab displays how many Assets and Contacts are affected by the Response. It's divided into two tiles: **Assets** and **Contacts**. Click on either to view a detailed breakdown.



## Assets Tile

The **Assets** tile displays a count of all affected Assets by Asset Type. Select the desired Asset Types from the list on the left to display the corresponding results on the right. Users can also search for Assets by name or External ID as needed.

The screenshot shows the 'Assets' tile with a search bar and a table of impacted assets. The search bar contains the text 'Search by asset name or external ID' and shows '402 Matching results'. The table has the following columns: Asset Type, Name, External ID, Distance, Address, and Action. The table lists five rows of impacted assets, all of which are 'Buildings'.

Asset Type	Name	External ID	Distance	Address	Action
Buildings	1140 W Riverdale Rd - Riverdale	- Riverdale [WD] 07902	11829.26 km (7350.36)	1140 W Riverdale Rd	-
Buildings	1228 Broadway - Placerville	- Placerville [WD] 01566	12624.35 km (7844.40)	1228 Broadway	-
Buildings	12300 South & 1300 East - Draper	- Draper [WD] 07890	11835.20 km (7354.05)	1283 E. Draper Pkwy.	-
Buildings	124th & Capitol	- Wauwatosa [W] 08844	9850.43 km (6120.77 m)	12345 West Capitol Drive	-
Buildings	134th South & Bangertter, Riverton	- Riverton [WD] 07903	11845.91 km (7360.70)	3728 West 13400 South	-

Click the **Export Assets** button to export a CSV file of the selected Assets that are impacted by this Response.

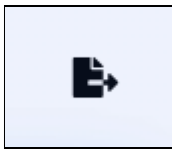


## Contacts Pane

The **Contacts** pane displays a count of all affected Contacts by Contact Type. Select the desired Contact Types from the list on the left to display the corresponding results on the right. Users can also search for Contacts by name or External ID as needed.

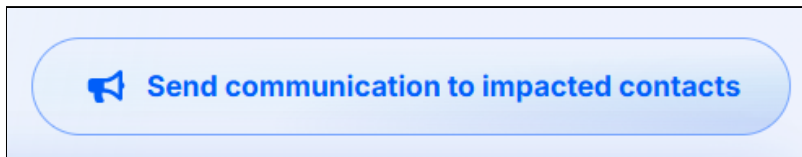
First Name	Last Name	External ID	Record Type	Email	Location Type	Location Name	Distance
			Employee		Static	Utah	11859.1

Click the **Export Contacts** button to export a CSV file of the selected Contacts that are impacted by this Response.



## Sending a Communication to Impacted Contacts

If a message needs to be sent to the impacted Contacts, click the **Send Communication to Impacted Contacts** button to begin drafting a Communication containing the existing Response information. The impacted Contacts will be automatically selected as recipients.



## Documents Tab

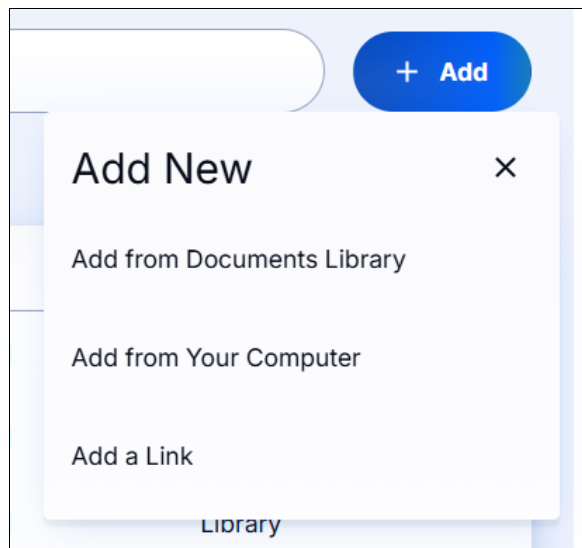
The **Documents** tab contains any Documents that have been attached to the Response, which can be filtered, searched and sorted for efficiency and ease of navigation. New Documents can also be added to the Response from this tab.

The screenshot shows the 'Documents (6)' tab in the Everbridge interface. At the top, there is a navigation bar with various tabs like Overview, Dashboards, Alerts, etc. Below the navigation, there is a search bar and an '+ Add' button. Two filter dropdowns are visible: 'Document Format' and 'Source'. The main content is a table with the following data:

Name	Type	Added	Added By	Folder	Source
<a href="#">Evacuation Plan.docx</a>	File (13.0 KB)	Aug 27, 2025 15:22		Uncategorized	<a href="#">Notes</a>
<a href="#">CMT Activation Checklist5.pdf</a>	File (178.2 KB)	Jul 22, 2025 06:13		Uncategorized	Library
<a href="#">Evacuation floorplan V12.png</a>	File (146.0 KB)	Jul 22, 2025 06:13		Uncategorized	Library
<a href="#">Incident Checklist Form1.pdf</a>	File (110.1 KB)	Jul 22, 2025 06:13		Uncategorized	Library
<a href="#">Evacuation Plan.pdf</a>	File (178.2 KB)	Jul 22, 2025 06:13		Uncategorized	Library
<a href="#">Emergency Contacts - Local Agenci...</a>	File (178.2 KB)	Jul 22, 2025 06:13		Uncategorized	Library

## Adding Documents

Up to 15 Documents can be attached to a Response for a total of 50MB. Documents can be manually added here from the Documents Library, from the current device, or as a link.



## Supported File Types

The following file types are supported for Response Documents:

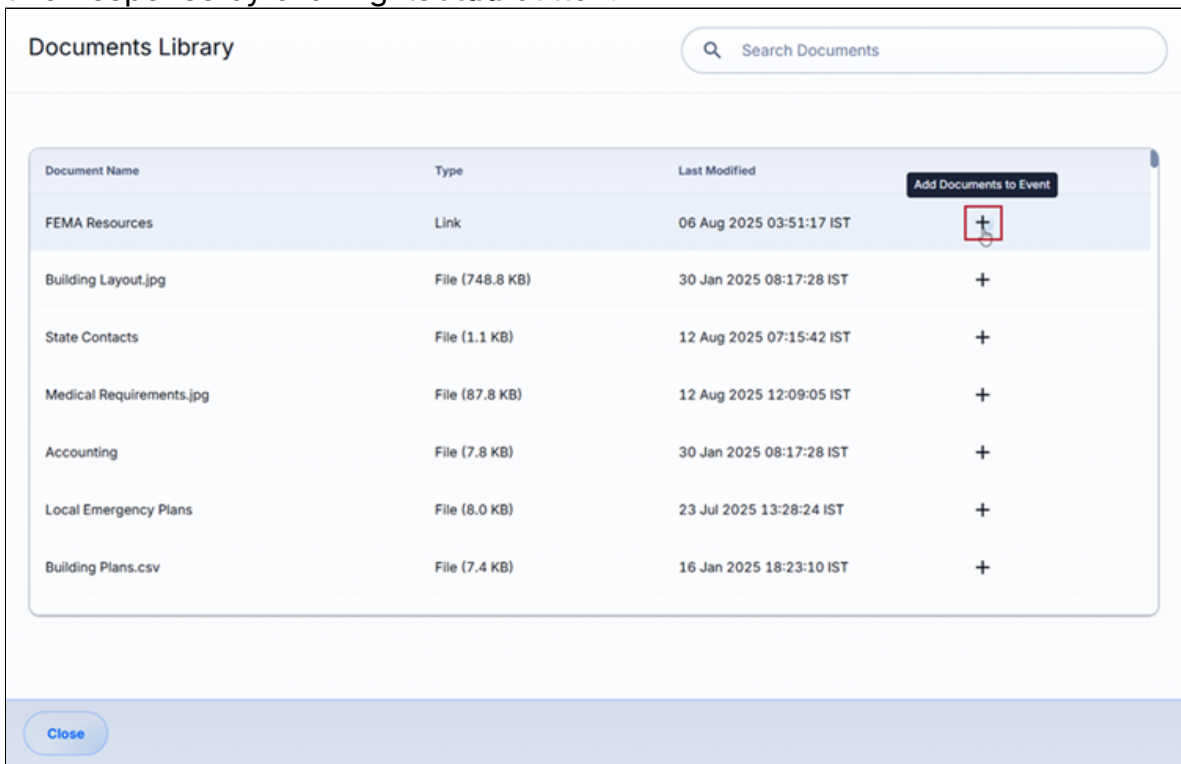
- .csv
- .docm
- .dotx
- .dotm
- .eml
- .gdoc
- .gsheet
- .key
- .log
- .md
- .msg
- .numbers
- .ods
- .odt
- .pages
- .pdf
- .rtf
- .txt
- .vi
- .webdoc
- .xltm
- .xlsx
- .xlsm
- .xltx
- .gslides
- .eps

- .heic
- .icon
- .potm
- .wmv
- .wav
- .mp3
- .wma
- .amr
- .ics
- .ical

### Adding from the Documents Library

To add a Document from the Documents Library:

1. Click **Add** then select **Add from Documents Library**.
2. Choose a Document from the Organization's Documents Library to attach to this Response by clicking its **Add** button.

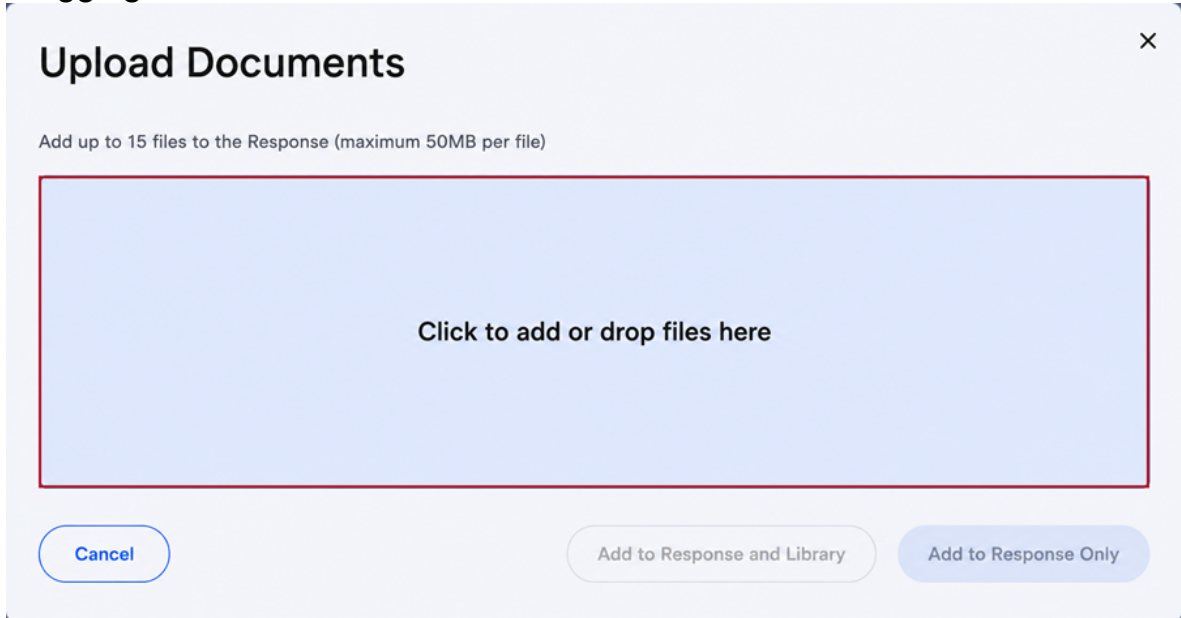


### Adding from Your Computer

To add a Document from the current computer:

1. Click **Add** and then **Add from Your Computer**.

2. Upload a file from the logged-in device by clicking the **Upload** field or dragging a file into it.



3. Click either:
  - **Add to Response and Library** to add the the Document to the Response while also adding it to the Organization's Documents Library.
  - **Add to Response Only** to add it to only the Response without saving it to the Library.

### Adding a Link

To add a Document from a link:

1. Click **Add** and then **Add Link**.

2. Paste the file's URL into the field and give it a distinguishable name.

3. Click either:

- **Add to Response and Library** to add the the Document to the Response while also adding it to the Organization's Documents Library.
- **Add to Response Only** to add it to only the Response without saving it to the Library.

## Searching for Documents

Enter a partial or full keyword into the **Search** bar to quickly locate a specific Document. Any attached Document with a name containing the searched keyword will be found.

Name	Type	Added	Added By	Folder	Source
CMT Activation Checklist5.pdf	File (178.2 KB)	Jul 22, 2025 06:13		Uncategorized	Library

## Filtering for Documents

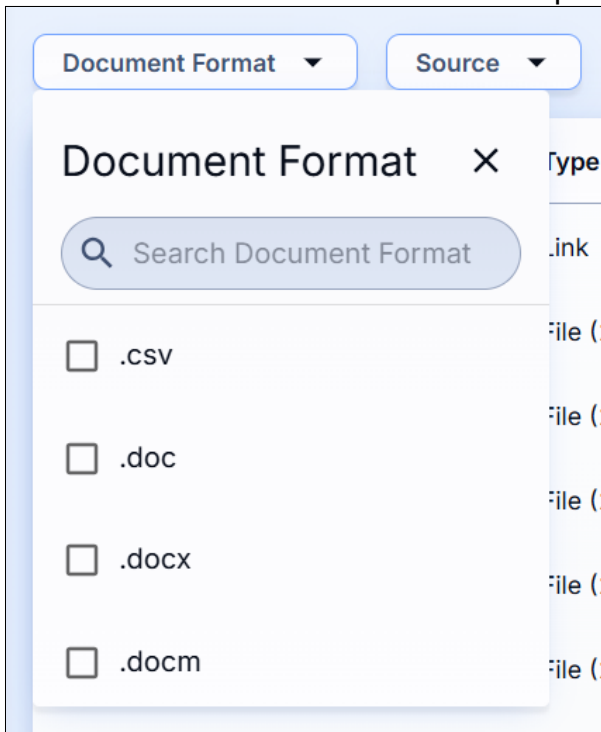
Multiple filters can be applied to help isolate specific Documents attached to a Response. There are two main types of filters for this page:

- Document Format
- Source

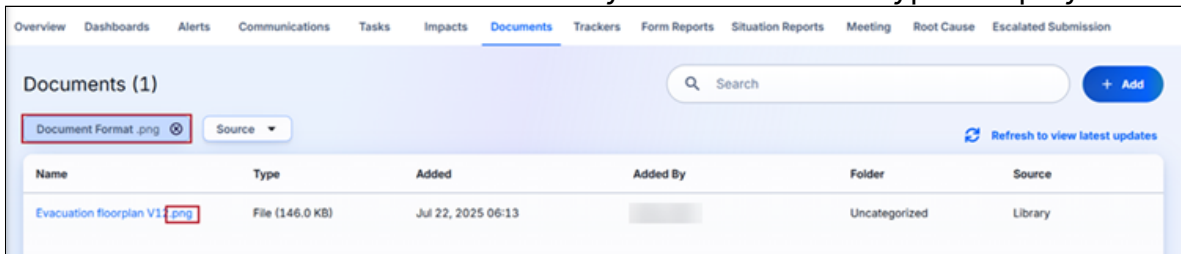
### Filtering by Document Format

To apply a Document Format filter:

1. Click the **Document Format** filter dropdown menu.



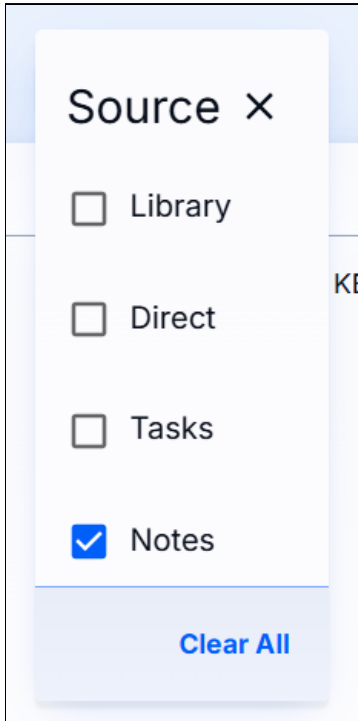
2. Scroll or search for the desired file type(s), then select the checkbox to apply the filter.
3. The **Documents** tab will refresh with only the selected file types displayed.



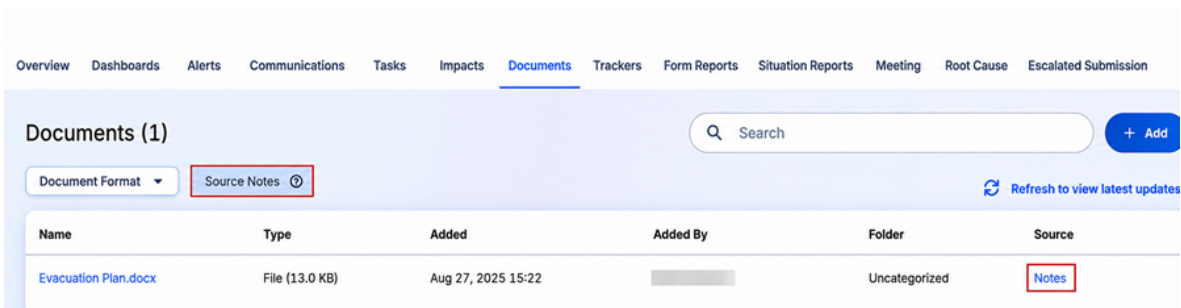
## Filtering by Source

To apply a Document Source filter:

1. Click the **Source** filter dropdown menu.
2. Choose the Source to be filtered for.



3. The **Documents** tab will refresh and display only items with the selected Document Source.



## Sorting Documents

Documents can be sorted by the following data points in ascending or descending order by clicking on their column headers:

- Name
- Type
- Added
- Added by
- Folder

- Source

Overview Dashboards Alerts Communications Tasks Impacts **Documents** Trackers Form Reports Situation Reports Meeting Root Cause Escalated Submission

Documents (7)  [+ Add](#)

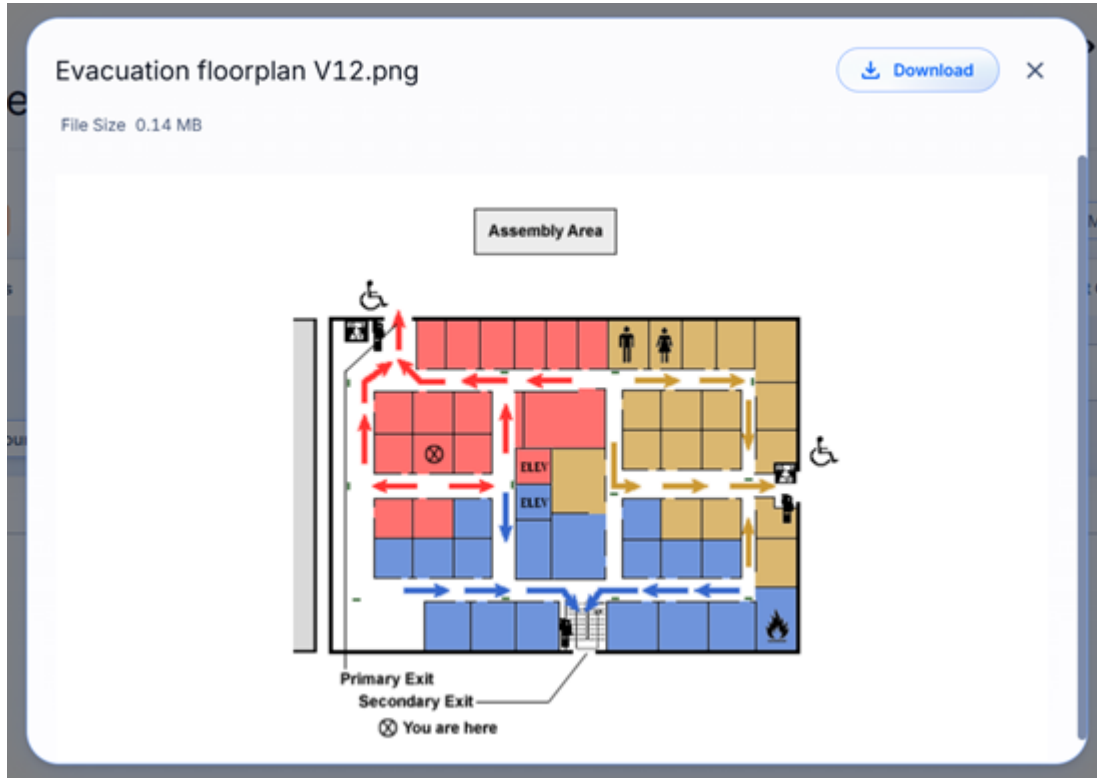
Document Format  Source

Name	Type	Added ↑	Added By	Folder	Source
<a href="#">Emergency Contacts - Local Agenci...</a>	File (178.2 KB)	Jul 22, 2025 06:13		Uncategorized	Library
<a href="#">Evacuation Plan.pdf</a>	File (178.2 KB)	Jul 22, 2025 06:13		Uncategorized	Library
<a href="#">Incident Checklist Form1.pdf</a>	File (110.1 KB)	Jul 22, 2025 06:13		Uncategorized	Library
<a href="#">Evacuation floorplan V12.png</a>	File (146.0 KB)	Jul 22, 2025 06:13		Uncategorized	Library
<a href="#">CMT Activation Checklist5.pdf</a>	File (178.2 KB)	Aug 27, 2025 15:22		Uncategorized	Library
<a href="#">Evacuation Plan.docx</a>	File (13.0 KB)	Aug 29, 2025 15:28		Uncategorized	Notes
<a href="#">Everbridge Suite User Guide</a>	Link	Aug 29, 2025 21:48		Uncategorized	Direct

## Previewing Documents

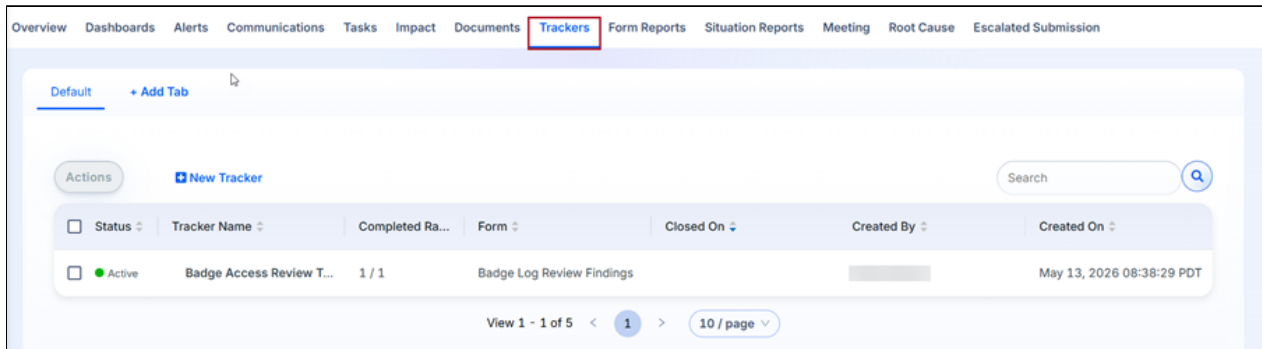
Documents can be previewed by clicking the file name from the list. Note that some file types will open immediately, such as with PNG images, while others will open in a new browser tab, like PDFs.

Click **Download** in the top-right corner of the preview modal to download the Document.



## Trackers Tab

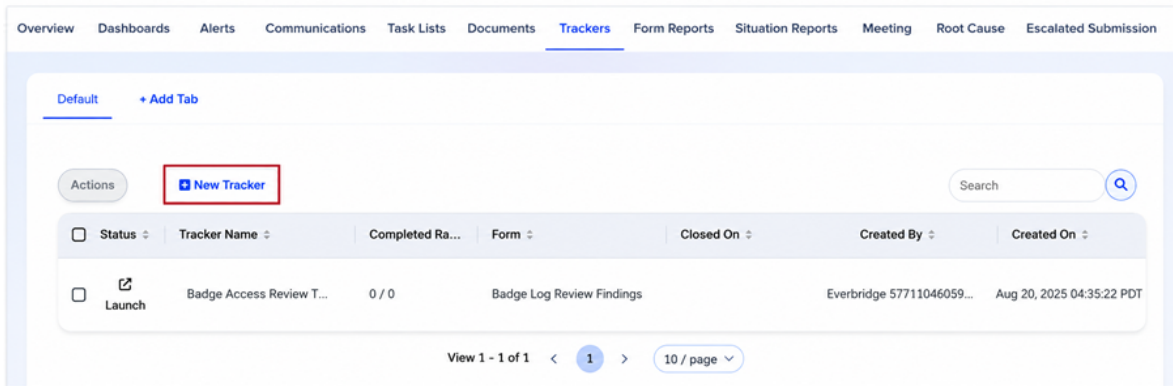
The **Trackers** tab contains any Trackers associated with this Response. Trackers are used to gather important data from responders in the field managing or experiencing a Response, such as reporting ongoing damage assessments after a disaster or reporting details about a suspected intruder.



## Adding a Tracker

Trackers can be added to a Response from the **Trackers** tab using the framework of existing Forms. To add a Tracker:

1. Click **New Tracker** on the **Trackers** tab.



- The **New Tracker** modal opens. Give the Tracker a name that clearly explains its purpose.

- Optionally, set an expiration date and time for the Tracker. Once the time has passed, the Tracker will automatically be closed.
- Set the following Member Portal visibility permissions as desired:
  - Edit Submission
  - View All Submissions
  - Create Multiple Submissions
- Click **Next**.

6. The **Form** step will open. Click **Select a Form**.

The screenshot shows a 'New Tracker' dialog box with three steps: 'Enter Details', 'Select Form', and 'Select Contacts'. The 'Select Form' step is active. Below the progress bar, there is a label '\* Form:' followed by a dashed red box containing the text 'Select a Form'. At the bottom, there are three buttons: '< Back', 'Cancel', and 'Next >'.

7. Choose the appropriate Form from the Organization's **Form Library** to use to create this Tracker, then click **Save**.

The screenshot shows a 'Select a Form' dialog box with a search bar at the top right labeled 'Search name or tag'. Below the search bar is a table with columns for 'Form Name', 'Tags', and 'Last Modified On'. The table contains four rows of form data. The third row, 'Suspicious Activity Report Form', is highlighted with a red border. At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button also highlighted with a red border.

Form Name	Tags	Last Modified On
<input type="radio"/> Badge Log Review Findings		Aug 20, 2025 04:04:00 PDT
<input type="radio"/> Damage Assessment		Aug 14, 2024 14:30:48 PDT
<input checked="" type="radio"/> Suspicious Activity Report Form		Dec 13, 2022 11:21:31 PST
<input type="radio"/> Vaccine Verification Form	Vaccination	Dec 13, 2022 11:21:08 PST

- The chosen Form will now appear on the Tracker being created. Click **Next**.

**New Tracker**

Enter Details      Select Form      Select Contacts

\* Form:

Suspicious Activity Report Form      Edit | Delete

< Back      Cancel      Next >

- Select the Contacts that will receive this Tracker as Individuals or via Groups and/or Rules.

**New Tracker**

Enter Details      Select Form      Select Contacts

\* Send to:

10 Individuals      1 Groups      1 Rules

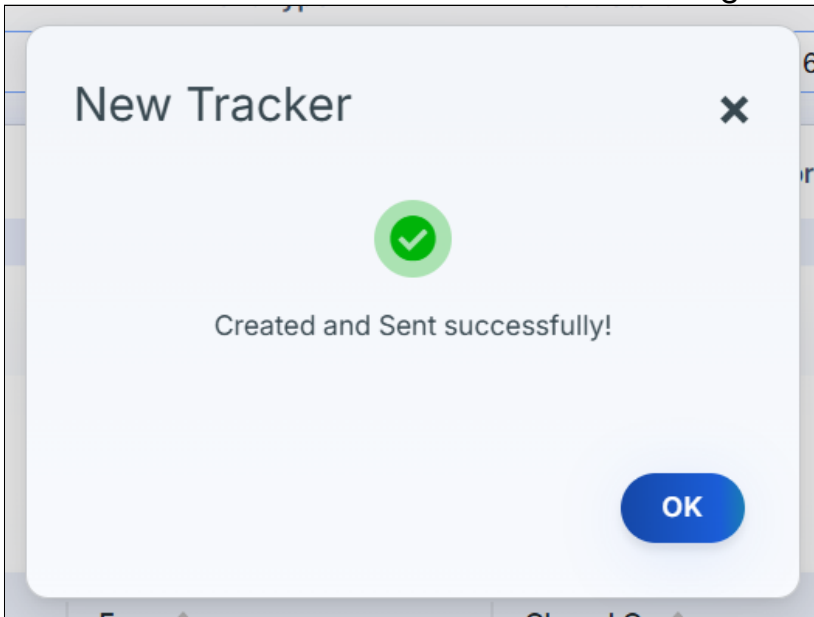
Preview Contacts      Clear selected contacts

Turn off tracker notifications

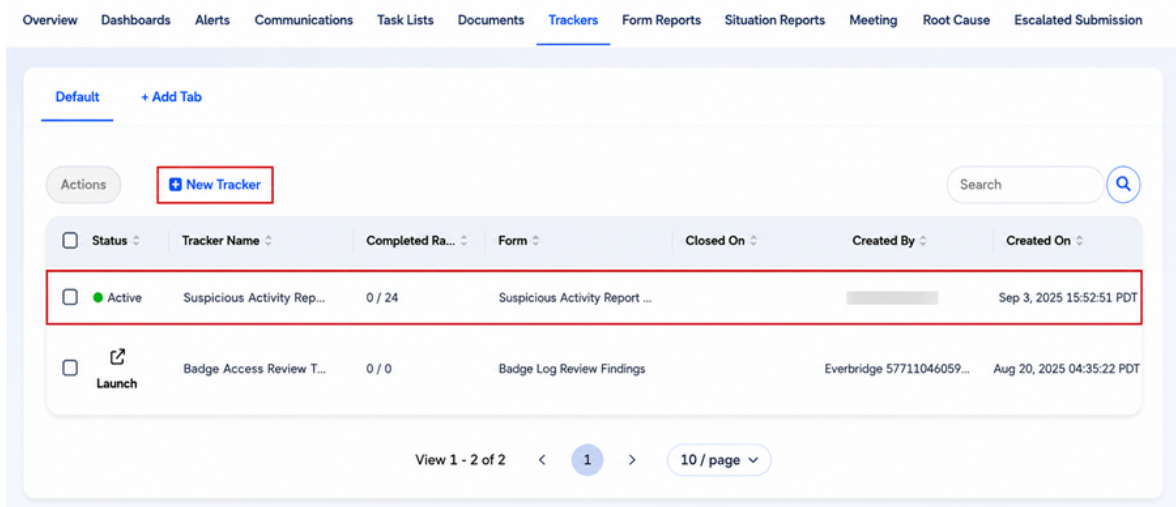
< Back      Cancel      Launch

- Optionally, click the **Turn Off Tracker Notifications** checkbox if Notifications should be disabled for this Tracker.

11. Click **Launch**. The **New Tracker** success message will appear.



12. The new tracker will appear in the list on the **Trackers** tab.

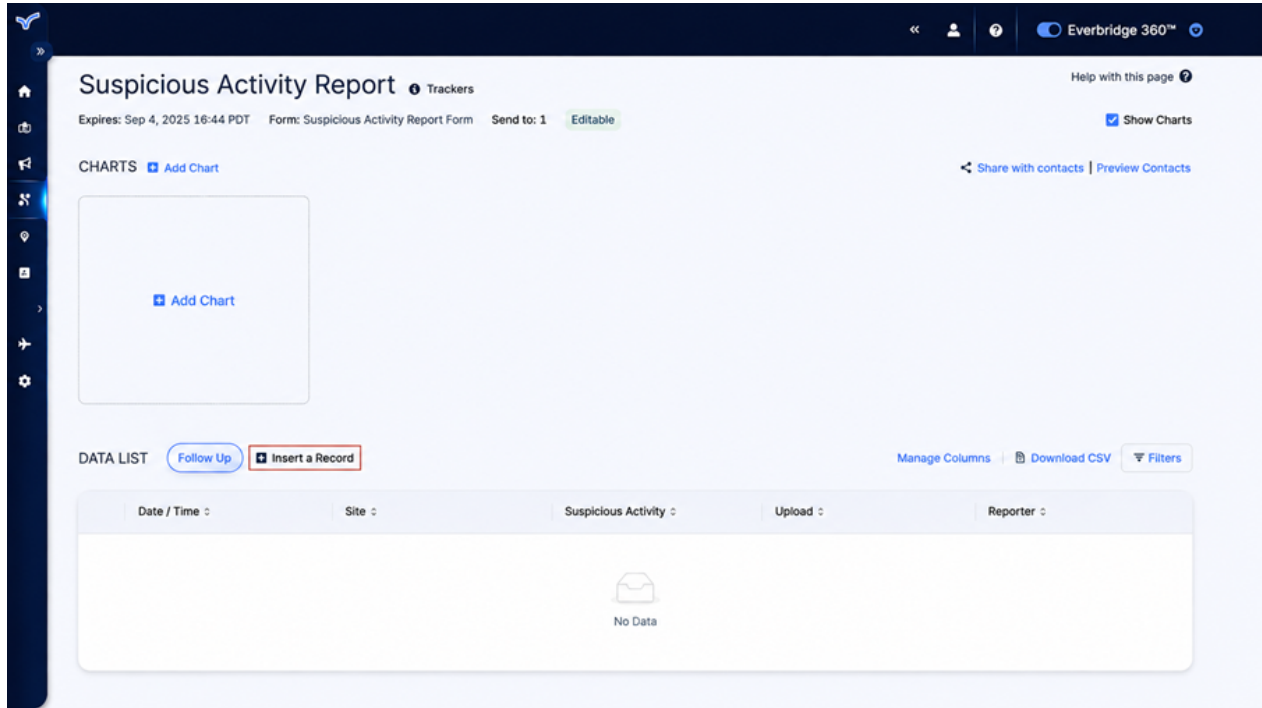


## Managing Trackers

Once created, Trackers can be managed from the **Tracker Details** page in a handful of ways:

- Add charts to help visualize the Tracker data.
- Send a follow-up to capture more recipients.
- Insert a record.
- Share with Contacts.
- Download the Tracker as a CSV.
- Arranging table columns.

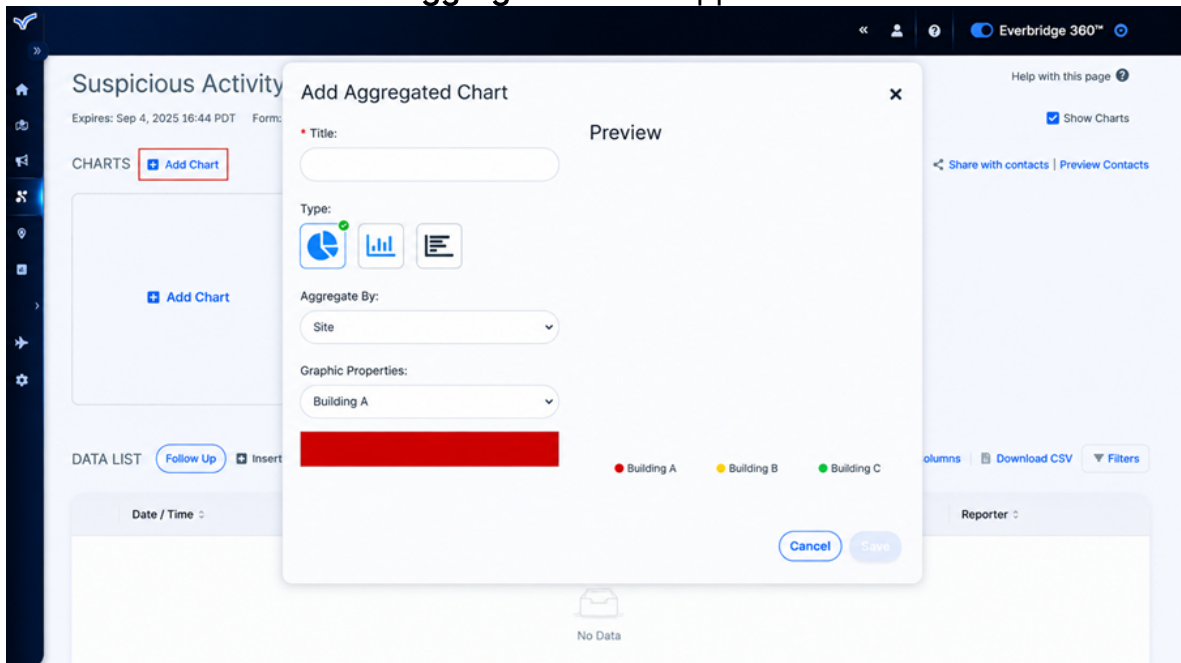
Click on a Tracker from the list to open its **Details** page.



### Adding a Chart

To add a chart to the Tracker:

1. Click **Add Chart**. The **Add Aggregated Chart** appears.



2. Enter the following:

---



---



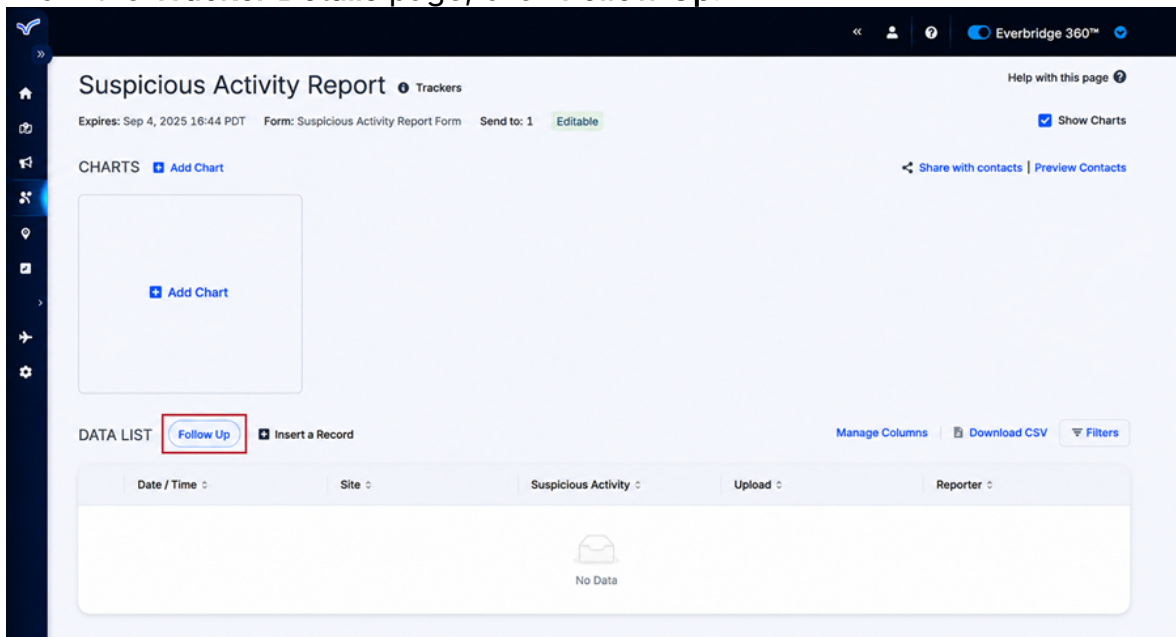
---

- In the **Title** field, type a name for your chart.
  - Select the type of chart:
    - The **Pie Chart** is a circle divided into sectors that each represent a proportion of the whole.
    - The **Horizontal Bar** chart's X-Axis represents the categories and the Y-Axis represents a value for the categories.
    - The **Vertical Bar** chart's X-Axis represents the categories and the Y-Axis represents a value for the categories.
  - In the **Aggregate By** field, select the column name from the menu.
  - In the **Graphic Properties** field, select the property corresponding to a color of the chart.
    - Double-click the field below the **Graphic Properties** field. Select the desired color or enter the Hex or RGB numbers to change the color.
3. Click **Save**. Your chart is added to the Tracker.
  4. If needed, hover the mouse over each sector to see the labels.

## Adding People and Groups to a Tracker

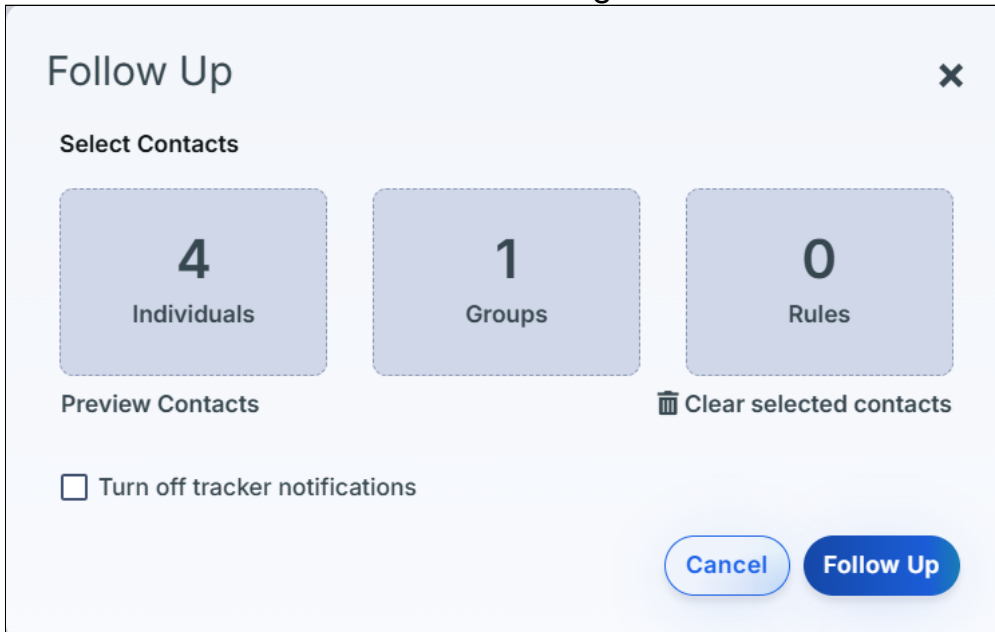
A follow-up can be sent to add more people and groups to the Tracker. To do this:

1. From the **Tracker Details** page, click **Follow Up**.



2. The **Follow Up** dialog appears. Select additional Contacts to receive the Tracker. If an active Tracker is already in place, you can add additional

Contacts to the Tracker without sending a new Tracker to all Contacts.

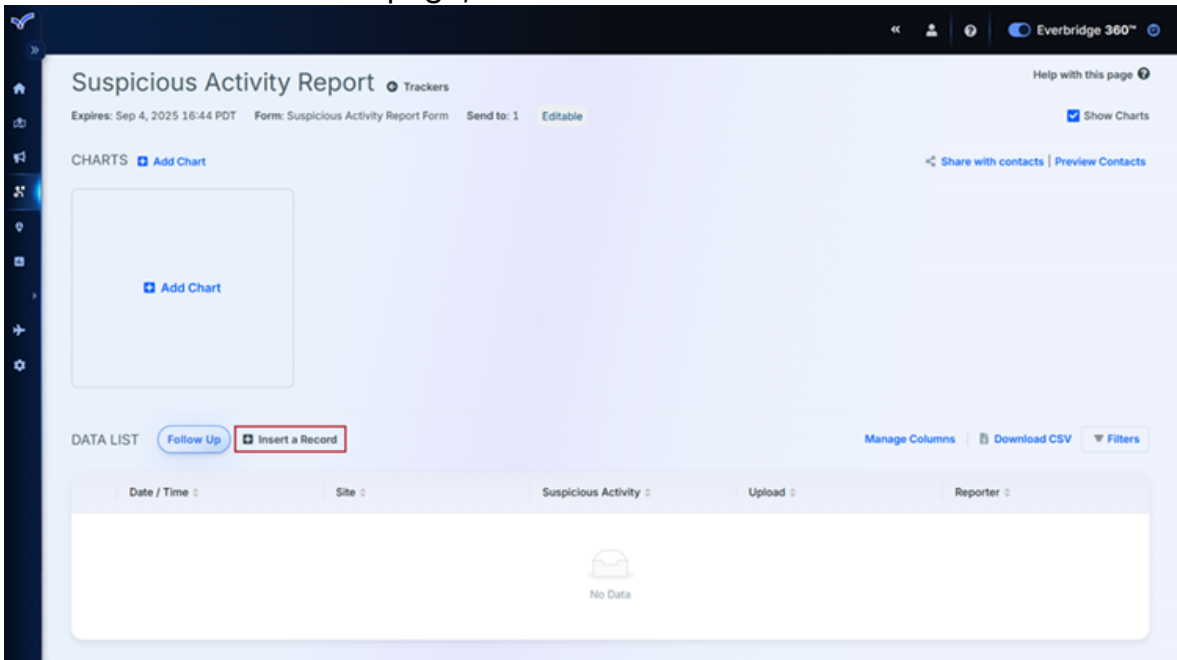


3. Click **Follow Up**.

### Inserting a Record

If needed, operators can manually submit a response record on behalf of a Contact. To insert a record:

1. From the **Tracker Details** page, click **Insert a Record**.



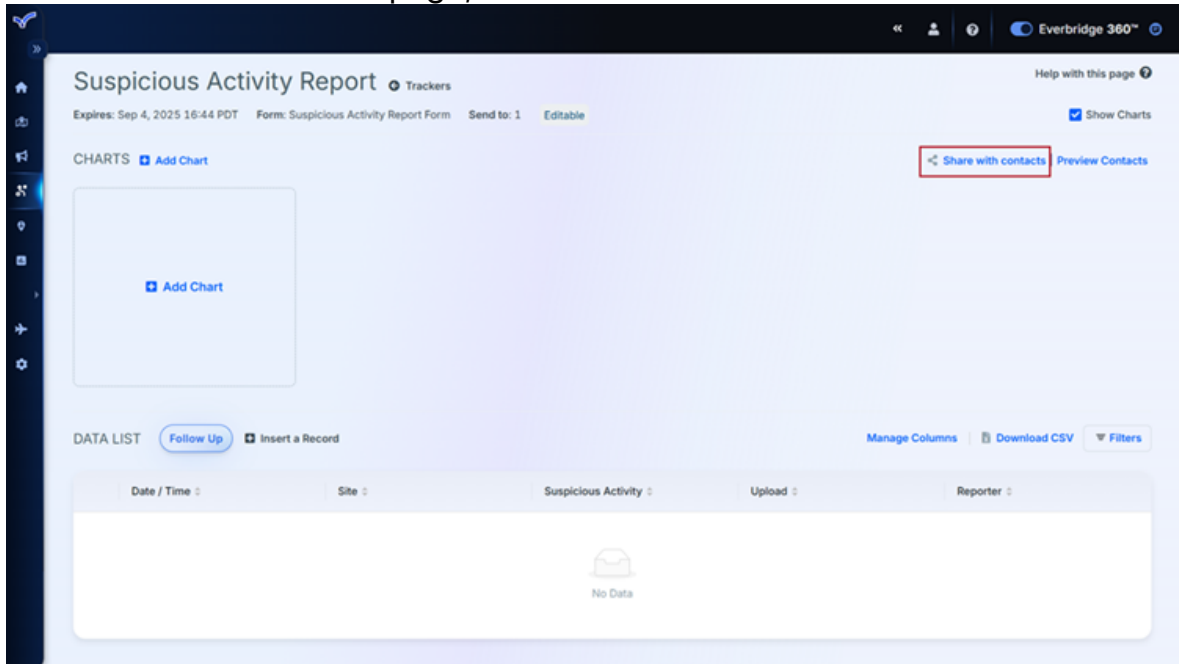
2. The Tracker form opens just as it would for the intended recipient. Fill in the Tracker, then click **Submit**.

3. Click the **Tracker Details** link. The record is added to the **Data List** of the **Tracker Details** page.

### Sharing the Tracker with Contacts

To share the Tracker with additional Contacts:

1. From the **Tracker Details** page, click **Share with contacts**.



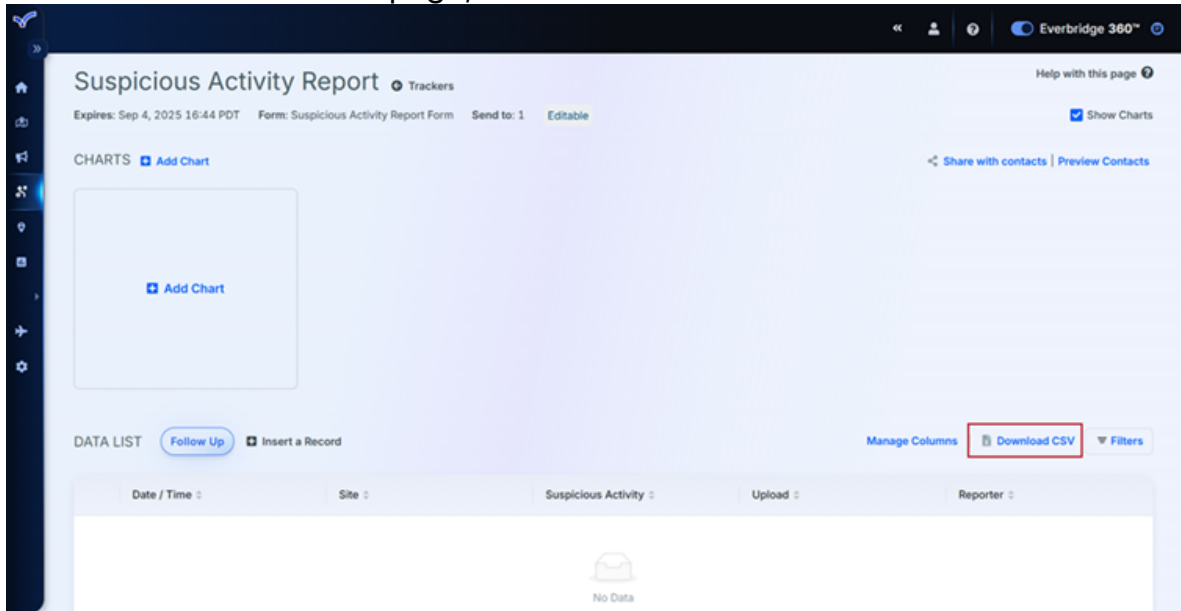
2. The **Share with Contacts** dialog appears.
  - Optionally, click **Clear selected contacts** to start fresh.
3. Click **Preview Contacts** to see who has already been sent the Tracker.
4. Select your Individuals, Groups, and/or Rules from each pane.
  - You can select the check boxes of Individuals, Groups, and Rules you want to remove.
5. Click **Select**.
6. Click **Share**. The Tracker is shared with the selected contacts.
7. Click **OK**.

**NOTE:** Only Active trackers can be shared with Contacts.

### Downloading a CSV of the Tracker

To download a CSV of the Tracker:

1. From the **Tracker Details** page, click **Download CSV**.



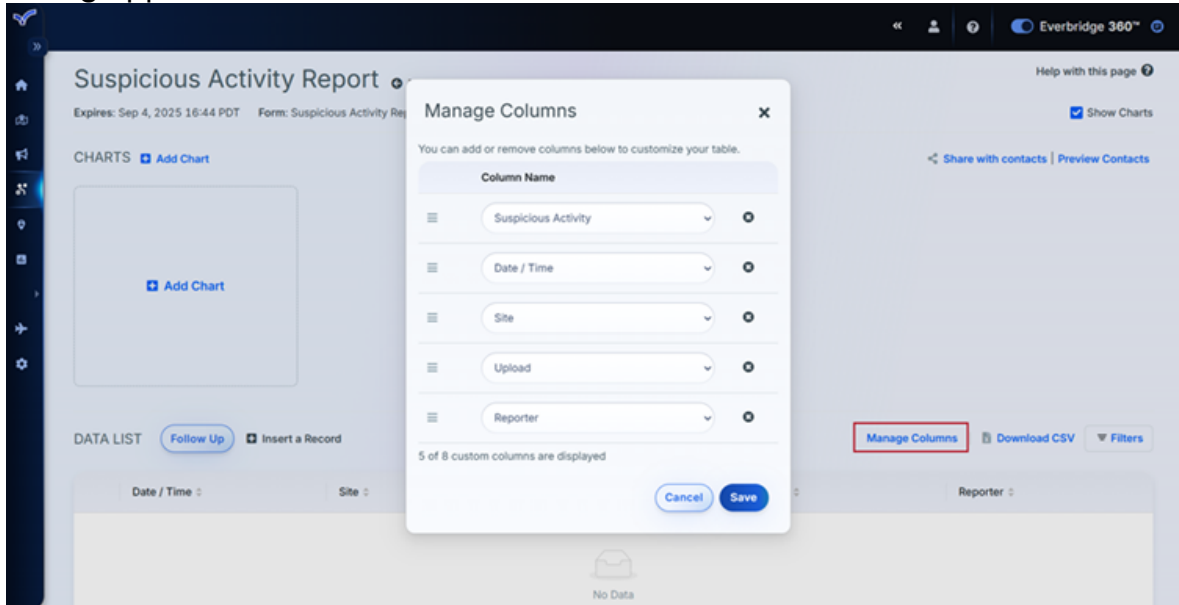
2. The **Download CSV dialog** appears. Click **OK**.
3. Wait for an email of the generated CSV file.
4. Click the link in the email to access the content.

**NOTE:** The **Download CSV** button will only work if there are records to download.

## Managing Table Columns

To arrange and manage the columns in the table:

1. From the **Tracker Details** page, click **Manage Columns**. The **Manage Columns** dialog appears.



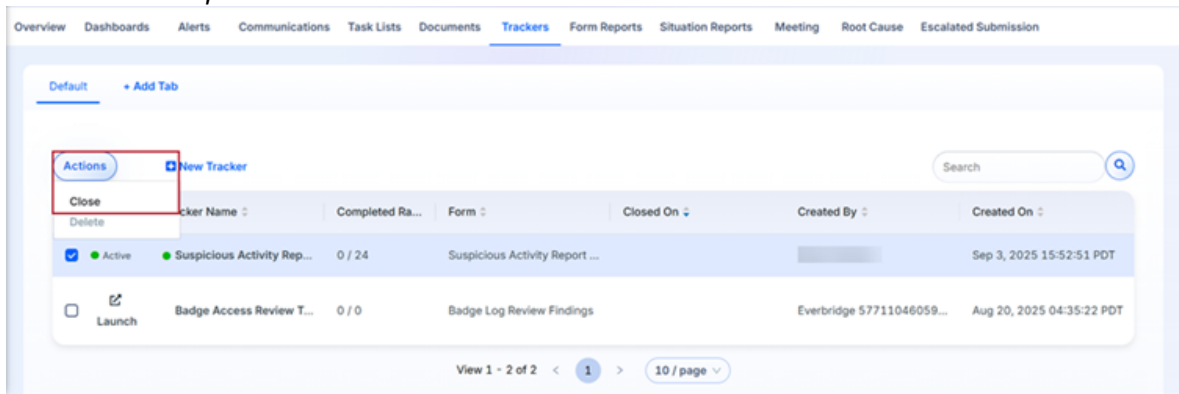
2. Select up to eight columns to see for this Tracker.
  - Starting from the top of the dialog, select the desired column name from the drop-down list. Top-to-bottom column names become left-to-right columns in the Data List.
  - If less than eight columns are displayed, click **Add a column**. The column is added to the bottom of the dialog. Select the desired column name from the menu.
  - Reorder the columns by using the Hamburger menu and dragging a column name.
  - If needed, remove a column by selecting the **X** to the right of its Column Name.
3. Click **Save**.

## Closing a Tracker

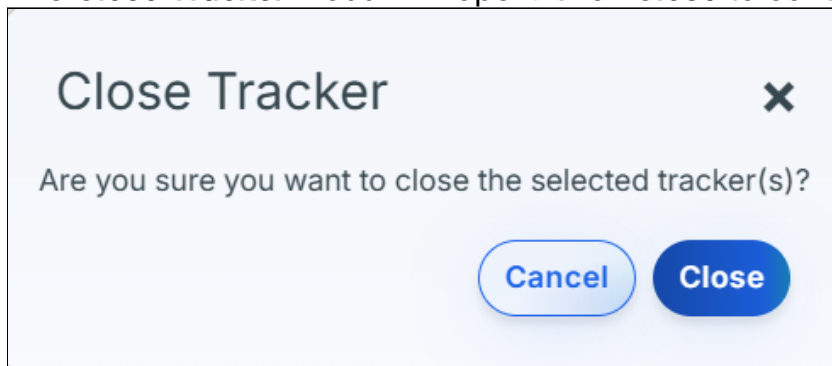
Active Trackers will be closed after the selected expiration time, but if no time was specified or it needs to be closed sooner, it can be done manually. To close a Tracker:

1. Select the checkboxes for the Trackers that need to be closed.

2. Click **Actions**, then **Close**.



3. The **Close Tracker** modal will open. Click **Close** to continue.

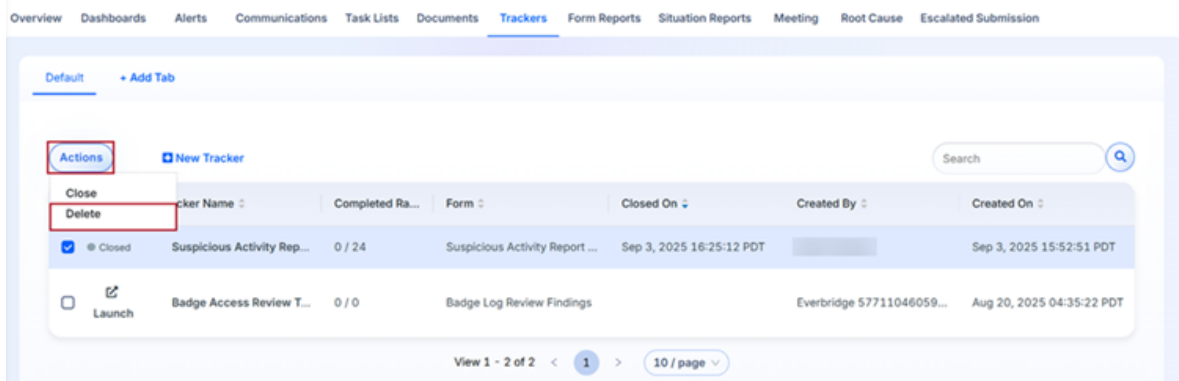


4. The **Trackers** tab will reload, and this Tracker's **Status** will be changed to **Closed**.

### Deleting a Tracker

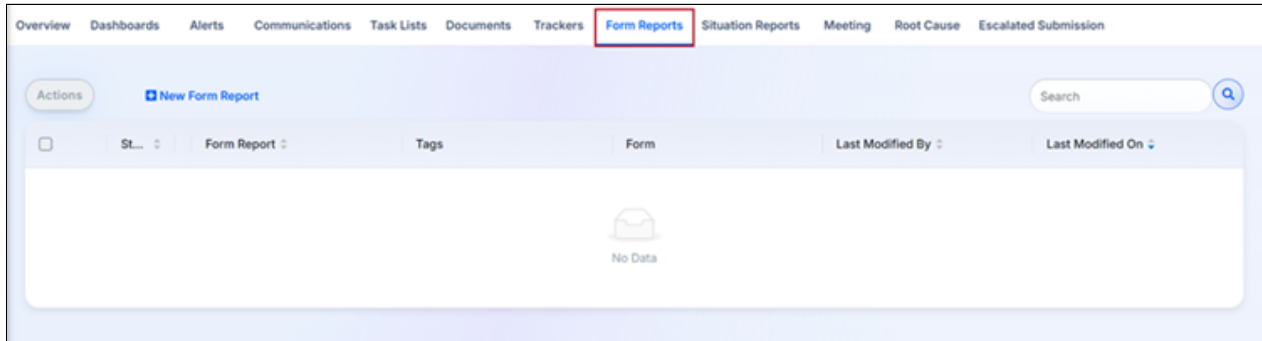
Closed or Unlaunched Trackers can be deleted. To delete a Tracker:

1. Select the checkbox for the Tracker that needs to be deleted.
2. Click **Actions**, then **Delete**.



## Form Reports Tab

The **Form Reports** tab contains any created Form Reports, which use preconfigured Forms to gather important information about a Response.

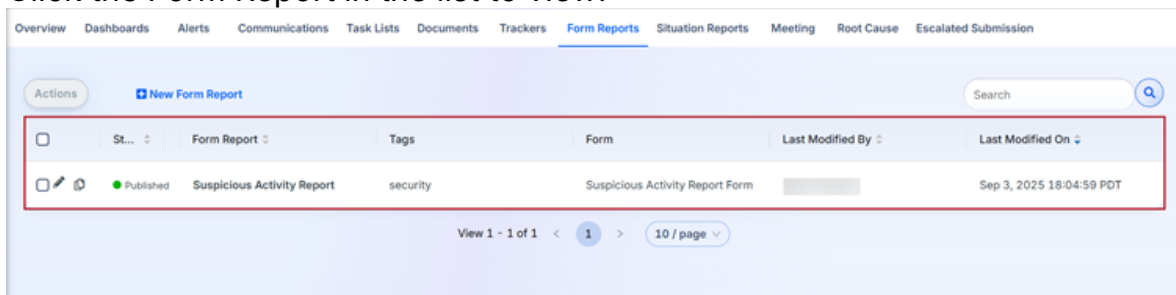


**NOTE:** New Forms can be created from the Form Library using the Classic Responses module. For more details, see the [Response Management User Guide](#).

## Viewing a Form Report

To view a Form Report:

1. Navigate to the **Form Reports** tab of the **Response Details** page.
2. Click the Form Report in the list to view.



3. The Form Report will open.

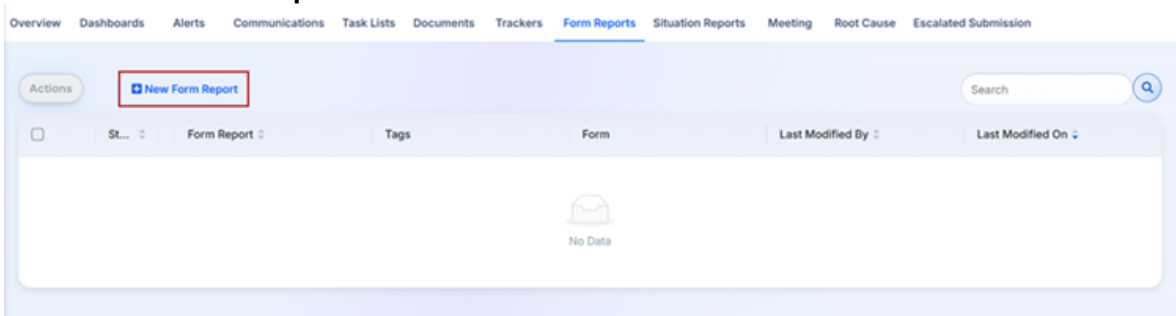
Optionally, any of the following can be done from here:

- Click **PDF** to create a PDF of the Form Report.
- Click **Close** to close the Form Report.
- Click **Edit** to make changes to the Form Report.

## Creating a New Form Report

To create a new Form Report:

1. Navigate to the **Form Reports** tab of the **Response Details** page.
2. Click **New Form Report**.



- The **Select a Form** dialog displays the existing Forms from **Form Library**. Click the radio button of the desired form.

Form Name	Tags	Last Modified On
<input type="radio"/> Badge Log Review Findings		Aug 20, 2025 04:04:00 PDT
<input type="radio"/> Damage Assessment		Aug 14, 2024 14:30:48 PDT
<input checked="" type="radio"/> Suspicious Activity Report Form		Dec 13, 2022 11:21:31 PST
<input type="radio"/> Vaccine Verification Form	Vaccination	Dec 13, 2022 11:21:08 PST

- Click **Save**. The New Form Report displays the form as a template.
- Give the new Form Report a name.
- Change the report status from **Draft** to **Publish** (or vice versa) as needed.
- Optionally, add **Tags**.
- Optionally, to see the report in **Preview** mode, click **Preview Report**. Then, click **Close**.
- Click **Save**.

## Deleting, Locking, or Unlocking a Form Report

To delete, lock, or unlock a Form Report:

- From the **Form Reports** tab, select the checkbox to the left of the desired Form Report. The **Actions** menu becomes enabled.

Form Report	Tags	Form	Last Modified By	Last Modified On
<input checked="" type="checkbox"/> Suspicious Activity Report	security	Suspicious Activity Report Form		Sep 3, 2025 18:04:59 PDT

- Select one of the actions:

- **Delete** - Delete the Form Report altogether.
- **Lock** - Lock a Form report. Note that you can only lock an unlocked Form Report. When selected, a lock icon appears next to the Form Report name and changes cannot be made to the report.
- **Unlock** - You can only unlock a locked Form Report.

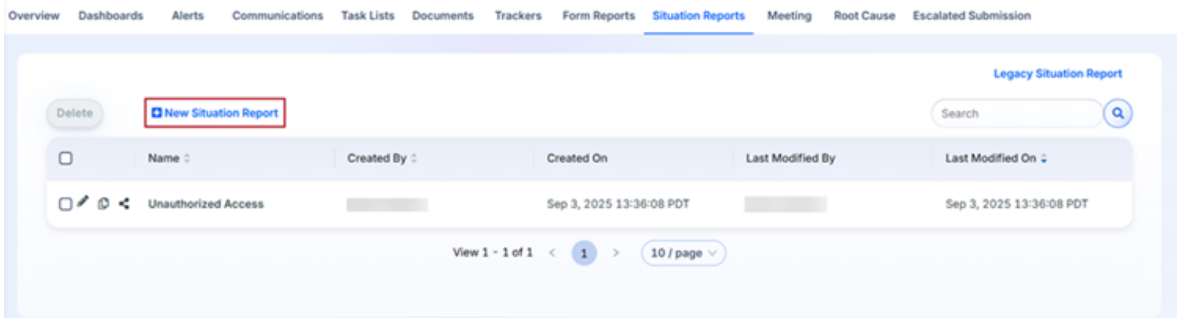
## Situation Reports Tab

Users can create a customized **Situation Report** by including or excluding certain elements from the report, providing a tailored overview of the current Response.

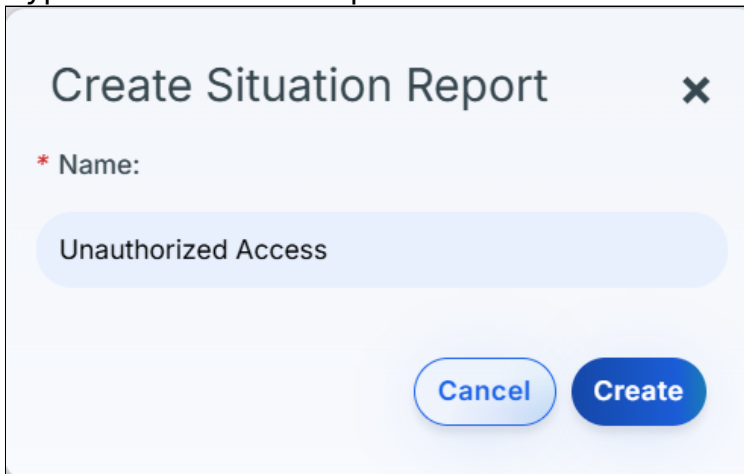
### Creating a New Situation Report

To create a new Situation Report:

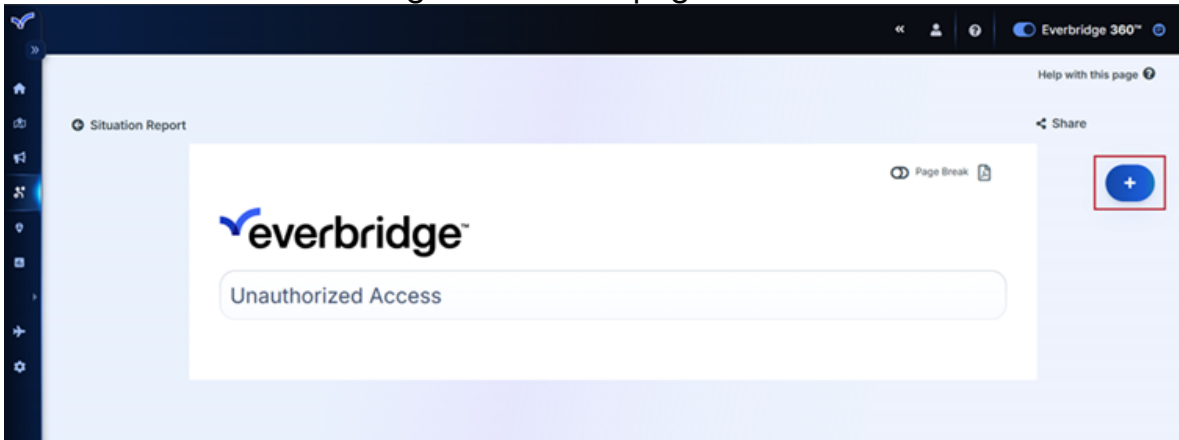
1. From the **Situation Report** tab, click **New Situation Report**.



2. Type a name for the report and click **Create**.



3. Click the + button on the right side of the page.



4. The **Manage Situation Report** modal appears. Select the checkboxes of the data Widgets that should be included in the report. Custom widgets can also be created here or imported from the Organization's **Widgets Library**.

The **Manage Situation Report** modal is divided into three sections:

- **Responses** - Include key information about the Response, like its Response Details or Incident Notifications.



- **Tasks** - Select any attached Task Lists that should be included in the Situation Report.

The screenshot shows the 'Manage Situation Report' window. On the left sidebar, the 'Tasks' tab is highlighted with a red box. The main content area is titled 'Select the widgets for this situation report:'. Under the 'Responses' section, there is a button labeled 'All Task Lists'. Below this, the section 'Browse and Select Task Lists (1)' contains a search bar with the text 'Search Task List' and a magnifying glass icon. To the right of the search bar is a dropdown menu labeled 'Show: All'. Below the search bar, a single task list is displayed: 'Security Response Checklist', which is highlighted with a green background and has a checkmark icon to its left.

- **Custom** - Create a new Widget or add an existing one from the **Widgets Library**.

### Manage Situation Report

✕

?

Select the widgets for this situation report:

Responses + Create | Add from Library

Tasks

**Custom**

Browse and Select Custom Widgets (1)

Show: All ▾

National Weather Service

Cancel
Save

5. Click **Save**. The Situation Report will generate with the selected Widgets.

Situation Report
Help with this page

Page Break

Unauthorized Access

**Event Details**

Event Start Time: Aug 20, 2025 05:06:33 PDT

Event Close Time: -

Event Owner: John Doe

Task and Dashboard Alerts: On

Description: This template is designed for incidents involving unauthorized or suspicious access attempts at the Glendale office.

Map: Location Name: Tower Global Glendale Office  
Map Address:  
Latitude/Longitude:  
Map Link:

**Incident Notifications (2)**

Status	Mode	Name	Open Duration	Opened On	Opened By	Last Updated
Active	Live	Staff Alert - Susp...	14d 9h 32m 36s	Aug 20, 2025 04...	Everbridge 5771...	Aug 20, 2025 04...
Not Launched		All Clear - Office ...	-	-	-	-

View 1 - 2 of 2    1 / page

**Documents (1)**

File Name	Folder	Type	File Size	Added By	Added On
Instructional_Guide_for...	Uncategorized	File	2.37 KB	Everbridge 577110460...	Aug 20, 2025 04:35:22 PDT

**Security Response Checklist**

Task List ID: TL-001 | Not Started

3 tasks

Owner:

Launched On:

Aug 20, 2025 04:35:24 PDT

Description:

This checklist outlines the standard response a [More](#)

Manage Columns | Expand Comments

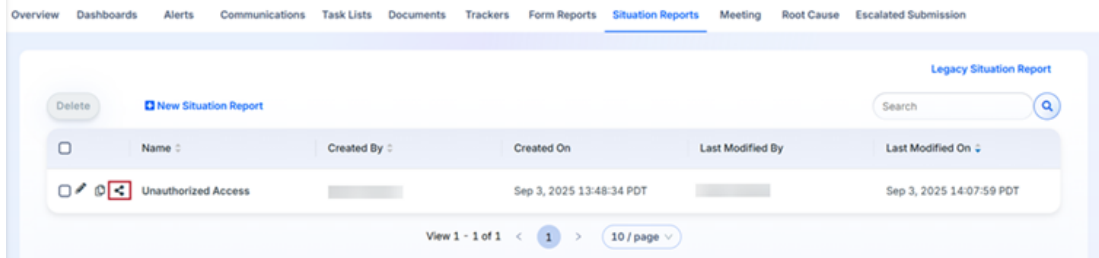
No.	Status	Task Name	Assigned To	Started On	Timer	File	Comments
1)		Lock down affected entry points	Security	-	-	<a href="#">Add</a>	

## Sharing a Situation Report

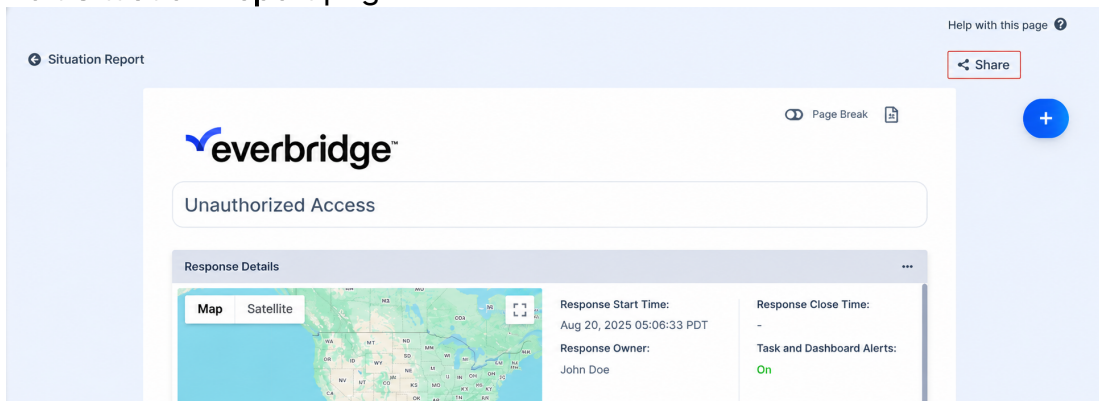
Situation Reports can be emailed directly to Contacts during various stages of a Response to keep stakeholders apprised of the latest status and response efforts.

To share a Situation Report:

1. Situation Reports can be shared from two places:
  - **Situation Reports** list on the **Response Details** page



- **Edit Situation Report** page



2. Click the **Share** icon.

- The **Email Situation Report to Contacts** modal appears. Select the recipients via Individuals, Groups, and/or Rules.

**Email Situation Report to Contacts** ✕

**\* Select Contacts:**

9 Individuals      1 Groups      1 Rules

Preview Contacts      Clear selected contacts

Selected Contacts will receive a link to the Situation Report through Email delivery path configured for them

---

**\* Subject**

Situation Report (Unauthorized Access) has been shared with you

**\* Include a message**

Dear User,

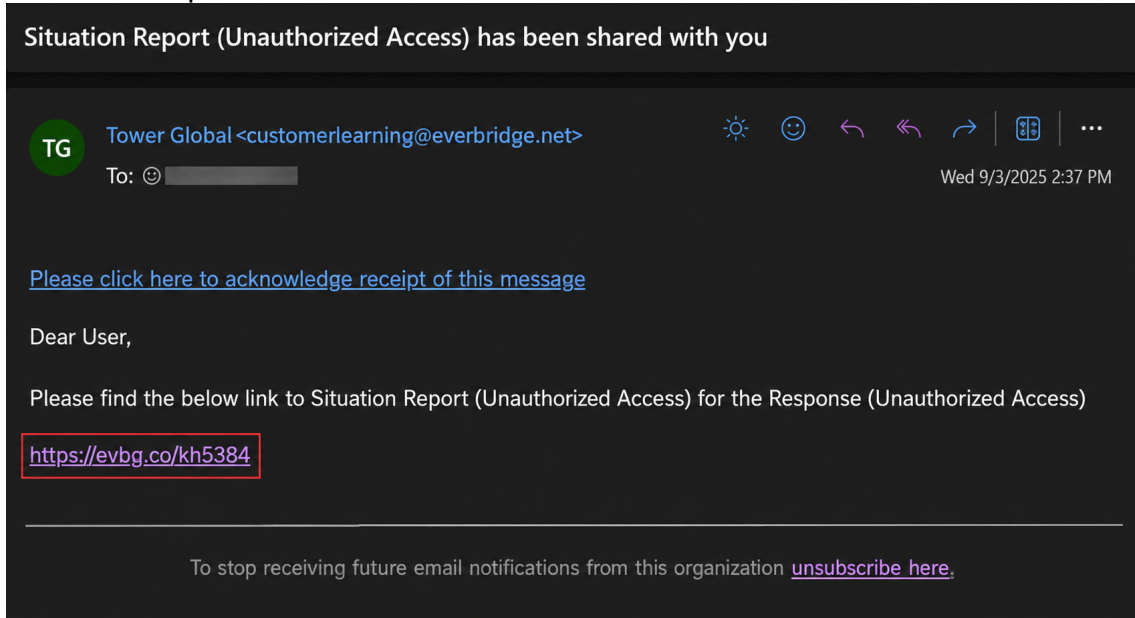
Please find the below link to Situation Report (Unauthorized Access) for the Response (Unauthorized Access)

0 / 2000

Cancel Send

- If desired, customize the **Subject** and **Include a Message** fields, or leave the default text.

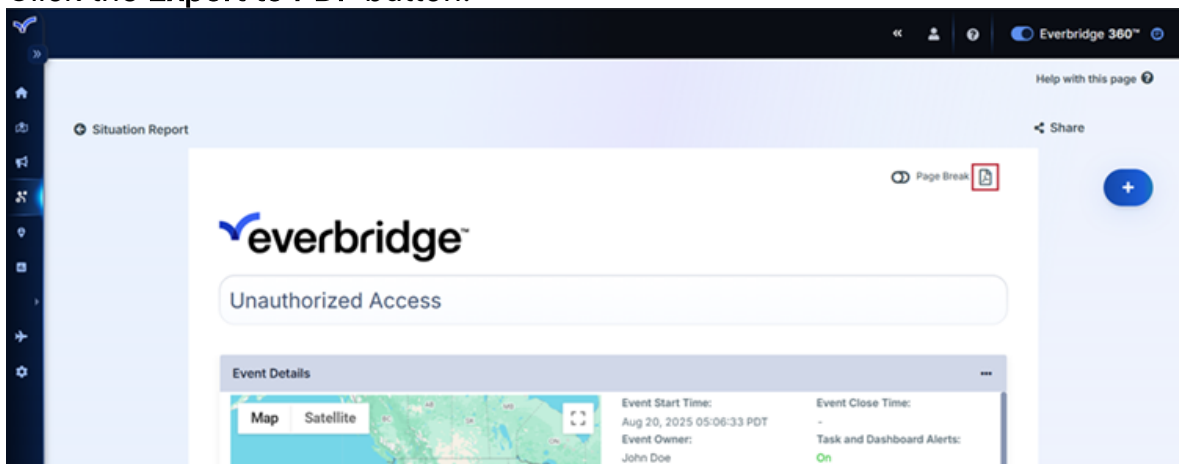
5. Click **Send**. The selected recipients will receive the emailed link to the Situation Report.



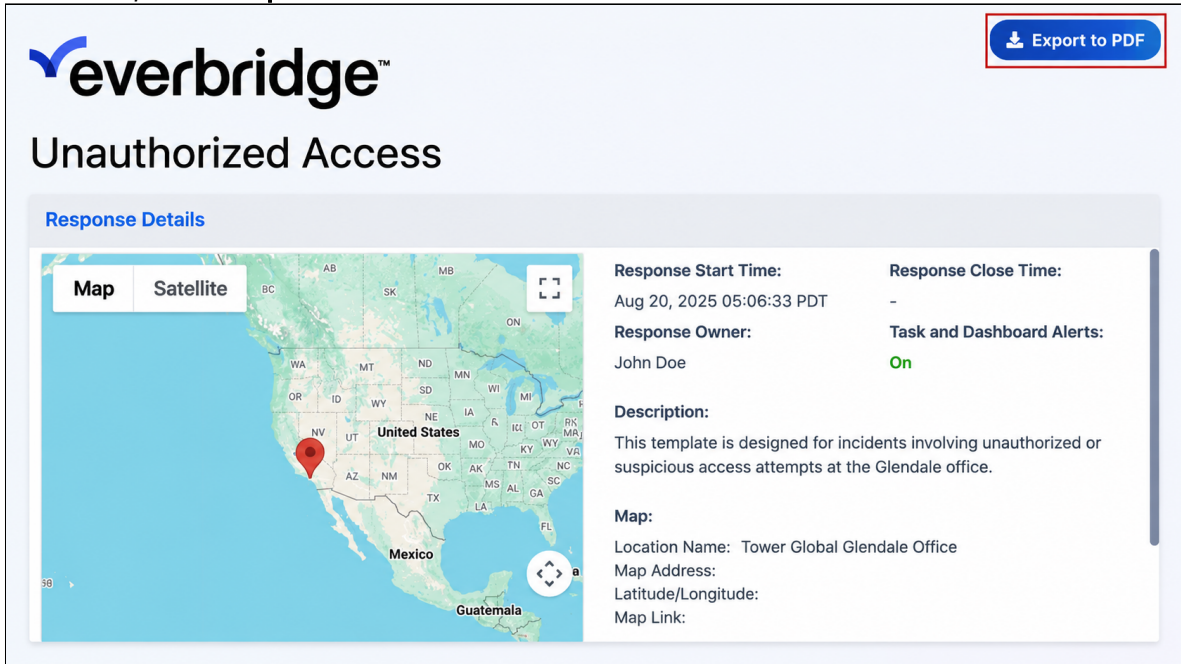
## Exporting a Situation Report

Situation Reports can be exported as PDF files so that they can be distributed as needed. To export a Situation Report:

1. Select a Situation Report from the list.
2. Optionally, click the **Page Break** toggle to enable page breaks in the PDF.
3. Click the **Export to PDF** button.



4. A preview of the PDF will be generated. Review it for accuracy, and once satisfied, click **Export to PDF**.

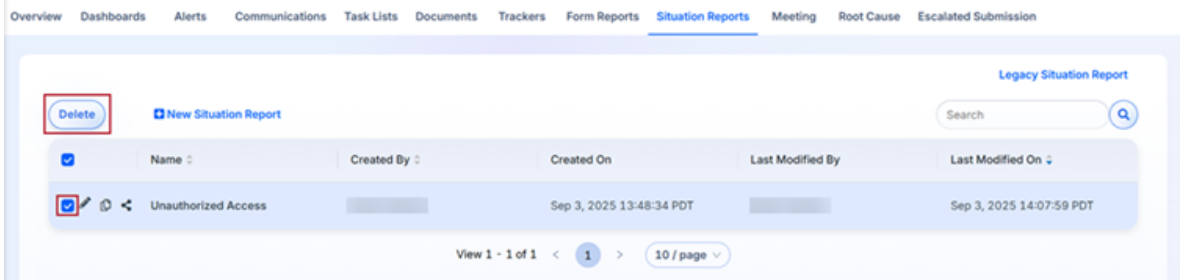


5. The device's Print Manager will open. Click **Save**.

## Deleting a Situation Report

To delete a Situation Report:

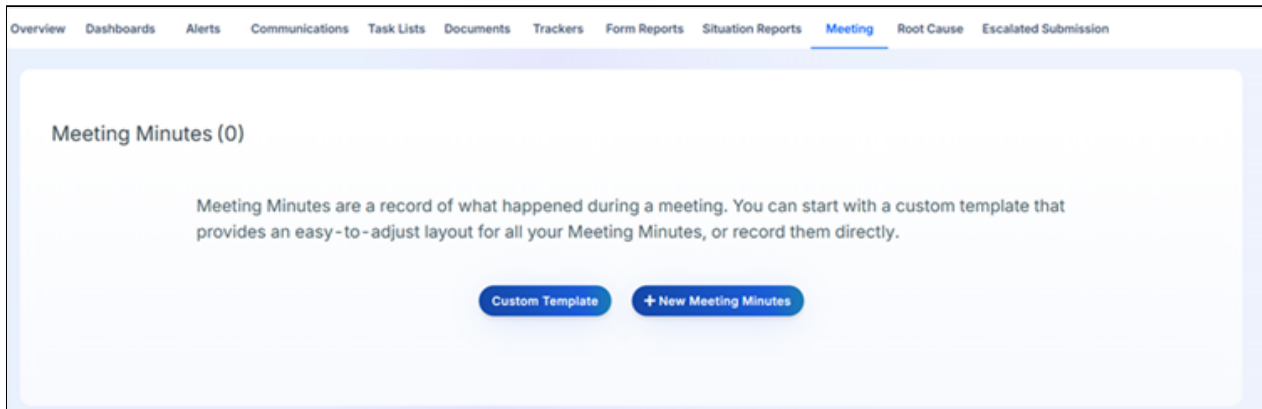
1. From the **Situation Reports** tab, select the checkbox of the Situation Report to be deleted and click **Delete**.



2. The **Delete Situation Report** dialog appears. Click **Delete Situation Report** to proceed.

## Meeting Tab

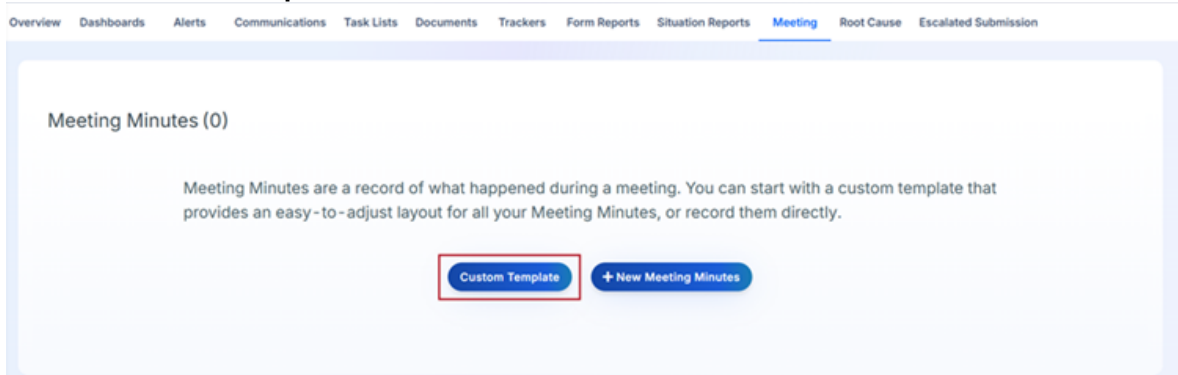
The **Meeting** tab contains any **Meeting Minutes** associated with a Response, which serve as a record of what took place during a meeting about the Response. This tab allows users to create new Custom Templates or add new Meeting Minutes as needed.



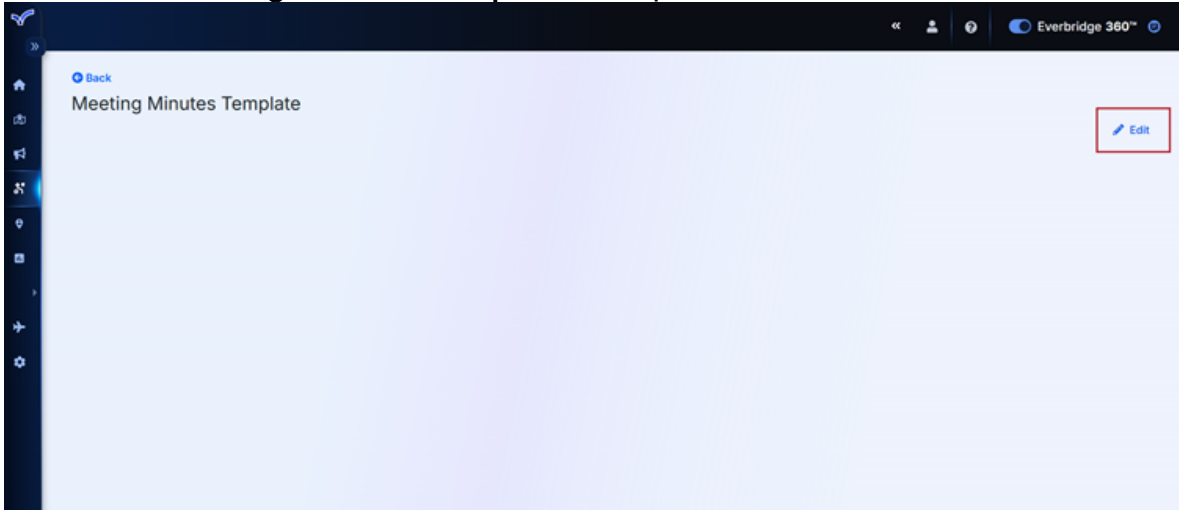
### Creating a Custom Meeting Minutes Template

A custom Meeting Minutes Template can be created and used for future meetings for uniformity and simplicity. To create a custom template:

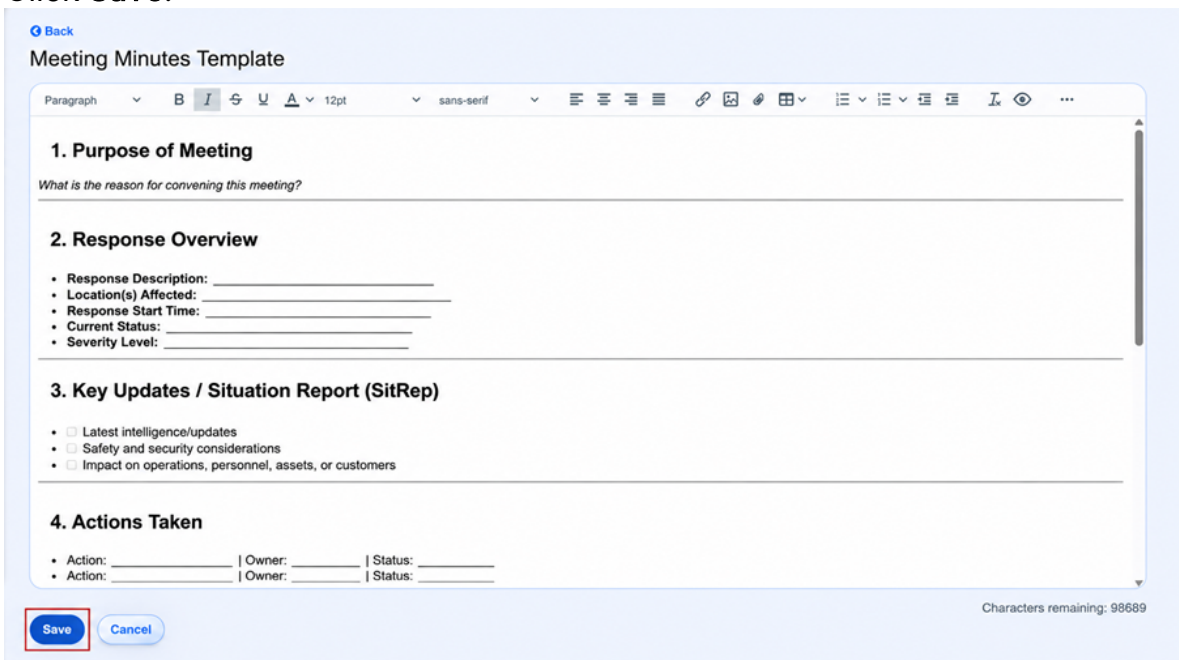
1. Click **Custom Template**.



- The blank **Meeting Minutes Template** will open. Click **Edit**.

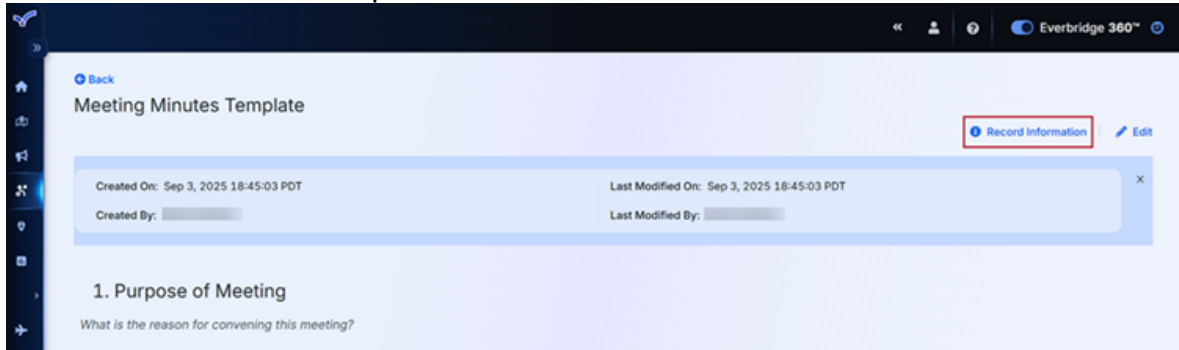


- Use the Rich Text Editor to add any needed text, images, formatting, links, etc.
- Click **Save**.



- The Meeting Minutes Template will be saved and available for future use. It can be edited further, if needed.

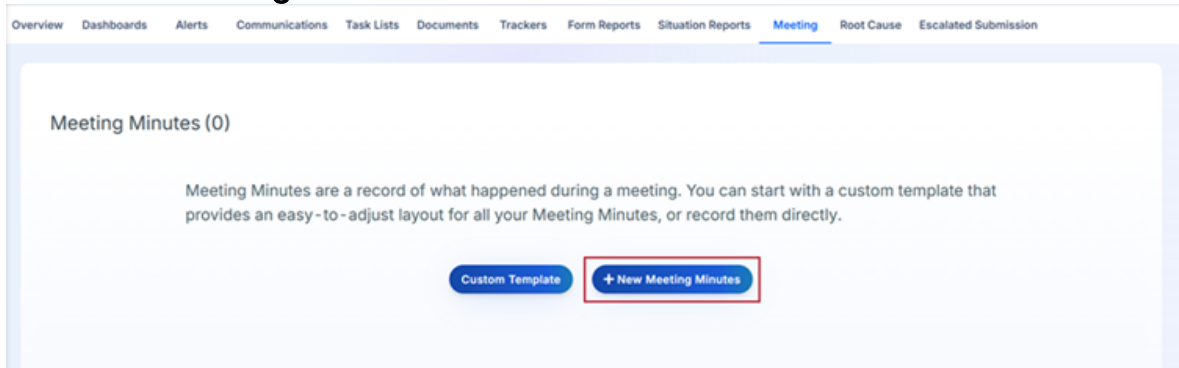
- Optionally, users can click **Record Information** to review the most recent actions made to the template.



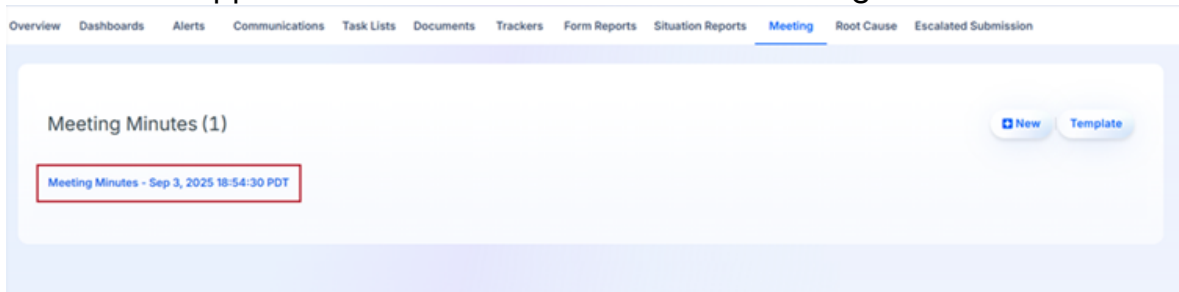
## Creating Meeting Minutes

To create new Meeting Minutes:

- Click **New Meeting Minutes**.



- The **Meeting Minutes** page will open.
  - If a Meeting Minutes Template has already been created, it'll automatically be applied to the Rich Text Editor. Simply fill in the required details for the meeting. If any changes are made that should be retained on the template, click **Save & Replace Template** at the bottom to save the Meeting Minutes and update the template.
  - If a template hasn't been created, yet, then add the meeting's details as needed.
- Click **Save**. The **Meeting** tab will refresh, and the newly-added Meeting Minutes will appear in the list for review or further editing.



## Root Cause Tab

If a Response has a clear reason behind why it occurred, it can be recorded in the **Root Cause** tab using the Rich Text Editor.

The screenshot displays the Everbridge 360 Responses user interface. At the top, a navigation menu contains the following items: Overview, Dashboards, Alerts, Communications, Tasks, Impacts, Documents, Trackers, Form Reports, Situation Reports, Meeting, **Root Cause** (highlighted with a red box), and Escalated Submission. Below the navigation menu, the 'Root Cause' tab is active, showing a rich text editor. The editor's toolbar includes options for Paragraph, Bold (B), Italic (I), Strikethrough, Underline (U), Text Color (A), Font Size (12pt), Font Family (sans-serif), Text Alignment (left, center, right, justified), Link, Image, Table, Bulleted List, Numbered List, Indent, and Outdent. The text area contains the following content:

The following conditions present an elevated risk of a severe thunderstorm:

- Atmospheric instability due to warm, moist air rising into cooler upper layers.
- Rapid development of convective storm cells from a passing cold front.
- Localized low-pressure system causing strong updrafts and storm formation.

At the bottom right of the editor, the text 'Characters remaining: 98702' is displayed above two buttons: 'Cancel' and 'Save'.

## Escalated Submission Tab

The **Escalated Submission** tab houses any Submissions that have been escalated to the Response. Click on an Escalated Submission from the list to review it.

Status	ID	Title	Created By	Created On	Last Modified By	Last Modified On
Open	FS-000...	Employee Safety Survey 20...		Nov 19, 2024 13:46:06 EST		Nov 19, 2024 13:46:06 EST

**NOTE:** For more on Submissions and escalations, see the [Classic Response Management User Guide](#).

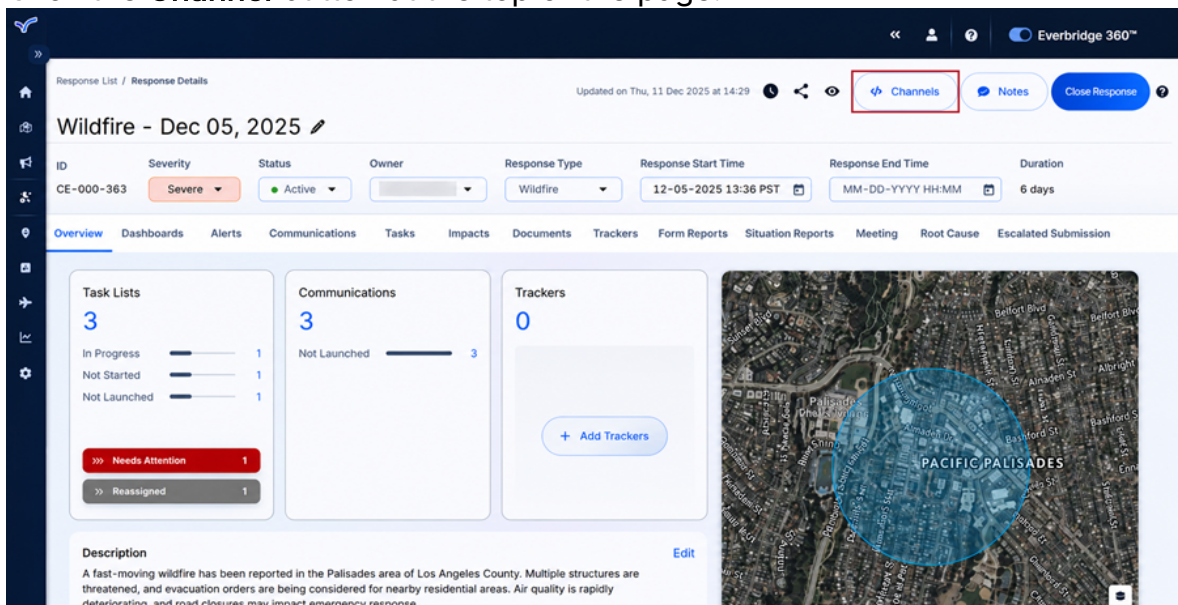
## Launching a Collaboration Channel from a Response

Operators can launch a **Collaboration Channel** (formerly called "Smart Channel") directly from the **Response Details** page by using their existing integrations to create a channel in Microsoft Teams, Cisco Webex Teams, or Slack.

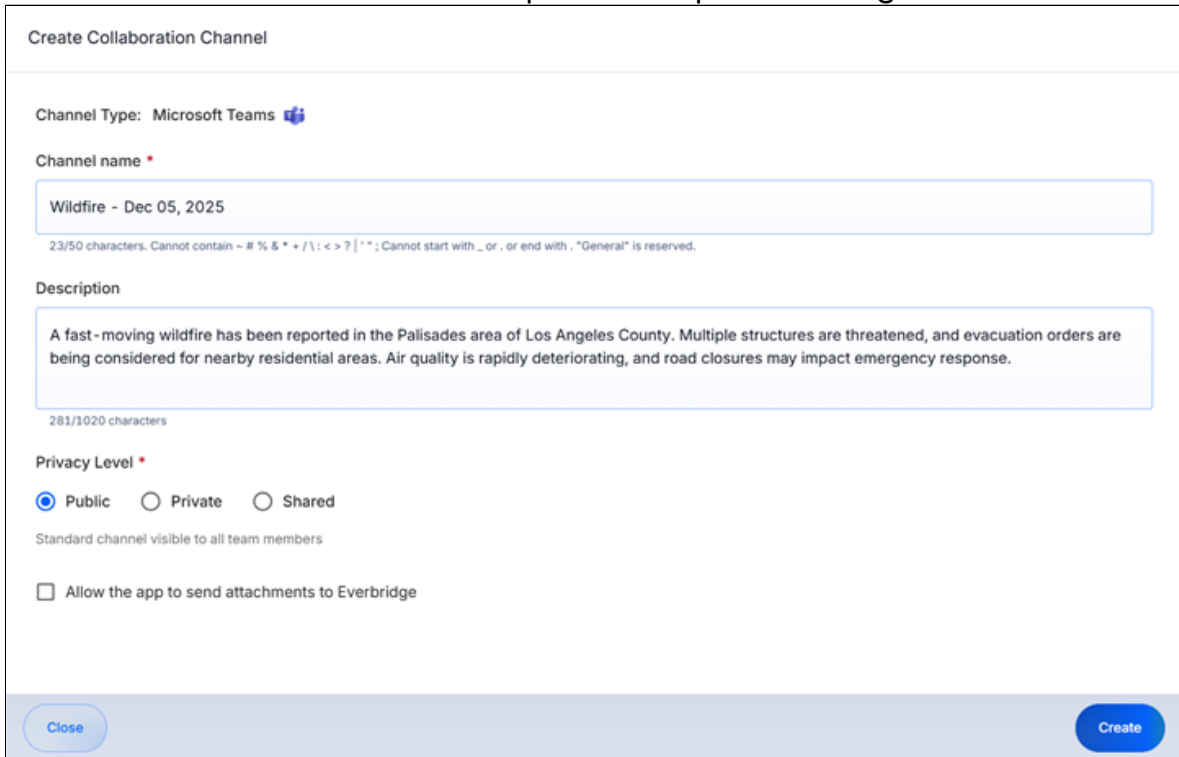
**NOTE:** This functionality is only available if an administrator has already configured a Collaboration Channel. For more information, see the **Collaboration Channel Integration** section of the [Everbridge Suite User Guide](#).

To launch a Collaboration Channel from a Response:

1. Navigate to the **Response Details** for the Response that should launch a Collaboration Channel.
2. Click the **Channel** button at the top of the page.



- The **Create Collaboration Channel** panel will open to the right.



- The **Channel Name** will automatically default to the name of the Response, but can be edited as needed. Consider the following if changing the name. Channel Names cannot:
  - Exceed 50 characters
  - Start with `_` or `.`
  - End with `.`
  - Only contain the word "General"
  - Contain the following characters: `~ # % & * + / \ : < > ? | ' ' ;`
- The optional **Description** field will also automatically populate with the Description from the Response, but can be edited as needed (up to 1020 characters).
- Under **Privacy Level**, make one of the following selections:
  - Public** - Creates a standard channel visible to all team members.
  - Private** - Creates a private channel only visible to invited members.
  - Shared** - Creates a shared channel accessible across multiple teams or organizations.
- Click **Create**. The system will start generating the Channel, and once done, will display its details. This includes the Channel's Name, Description, Response Severity, Response Owner, and Response Start Time.

## Using the Collaboration Channel

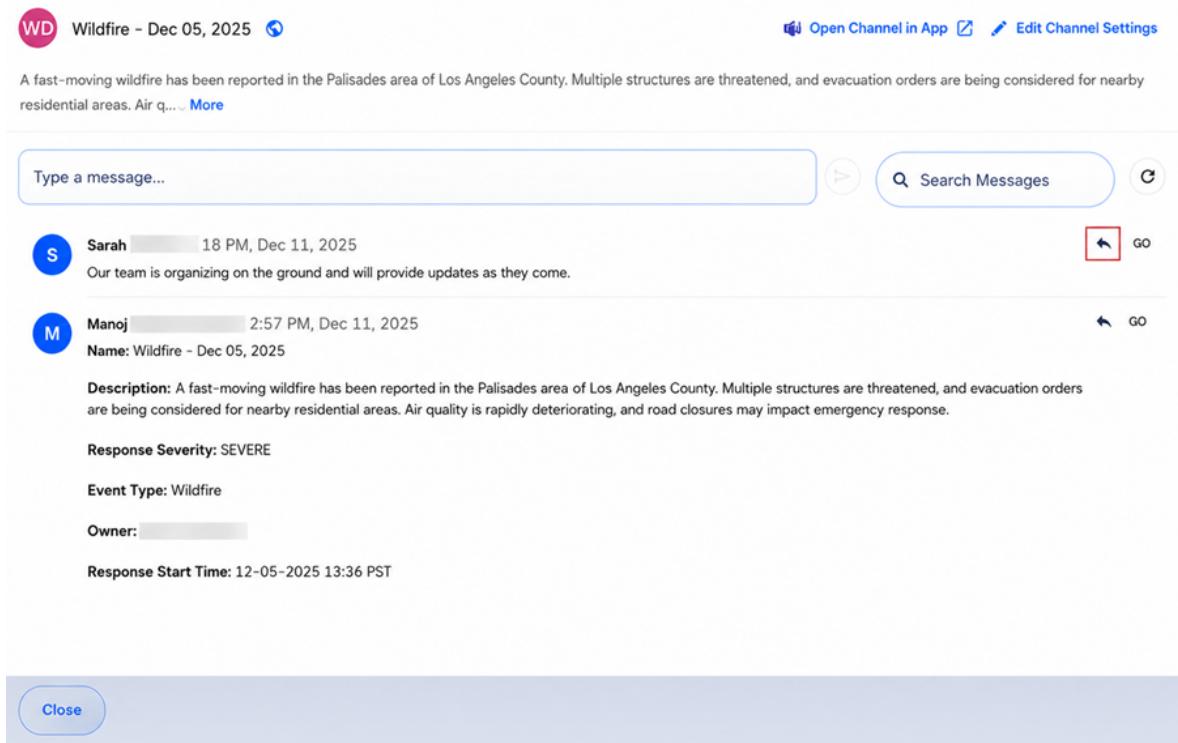
Once a Collaboration Channel has been created, any users allowed to access it can see it from the **Response Details** page from which it was created by clicking the **Channel** button again at the top to expand the panel.

### Leaving New Messages

Users can communicate with each other in a Collaboration Channel by leaving messages for one another.

To leave a message:

1. Open the Collaboration Channel.
2. Review its details and any other comments that have already been left.
3. Enter the desired message into the text field and click the **Send** button.



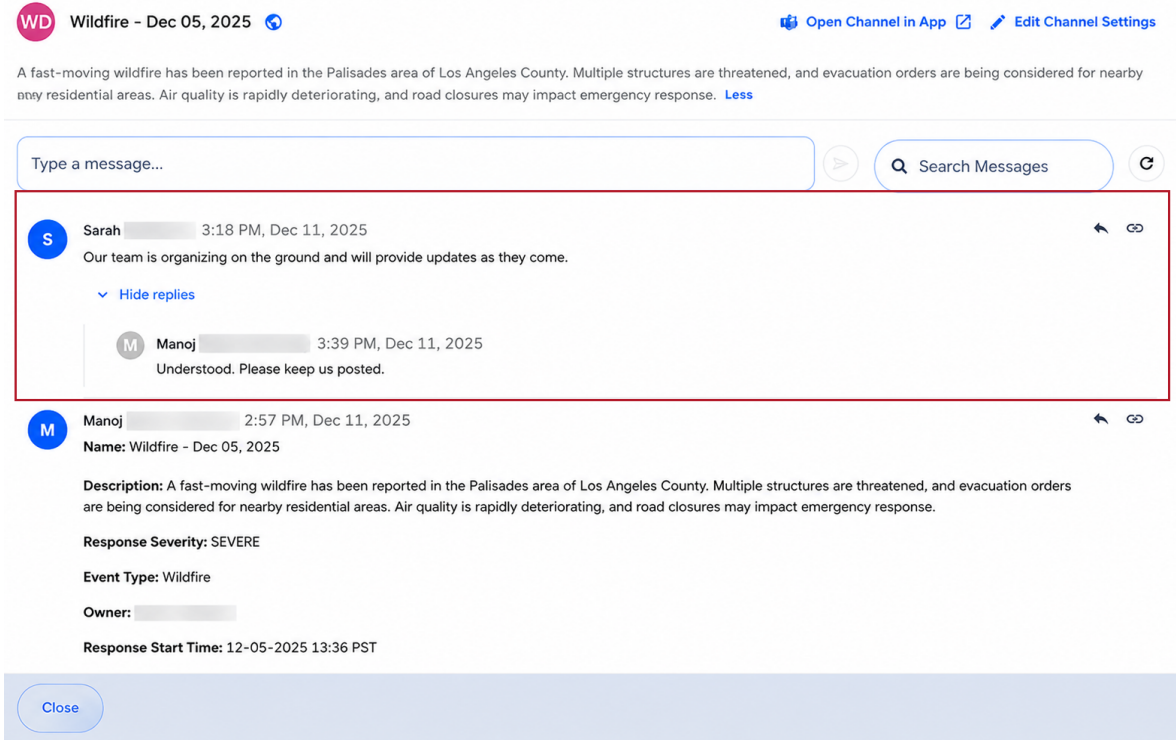
4. The new comment will appear in the messages list.

### Replying to Messages

Users can reply directly to a collaborator's message for more efficient and streamlined communication and message organization.

To reply to a specific message:

1. Open the Collaboration Channel.
2. Click the **Reply** button for the message that needs a response.
3. Enter the response in the **Reply** text field and click **Send**.
4. The new reply will appear nested below the original message, allowing users to easily tell which responses were meant for whom.



## Opening the Collaboration Channel in its Integrated App

Users who prefer working directly within their integrated app (Microsoft Teams, Cisco Webex Teams, or Slack) are welcome to do so by clicking **Open Channel in App** at the top of the page. The integrated app will open, allowing the user to review and leave messages as needed from there.



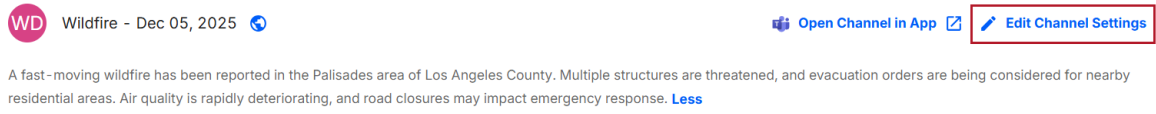
## Editing Channel Settings

A Collaboration Channel's settings can be updated after creation.

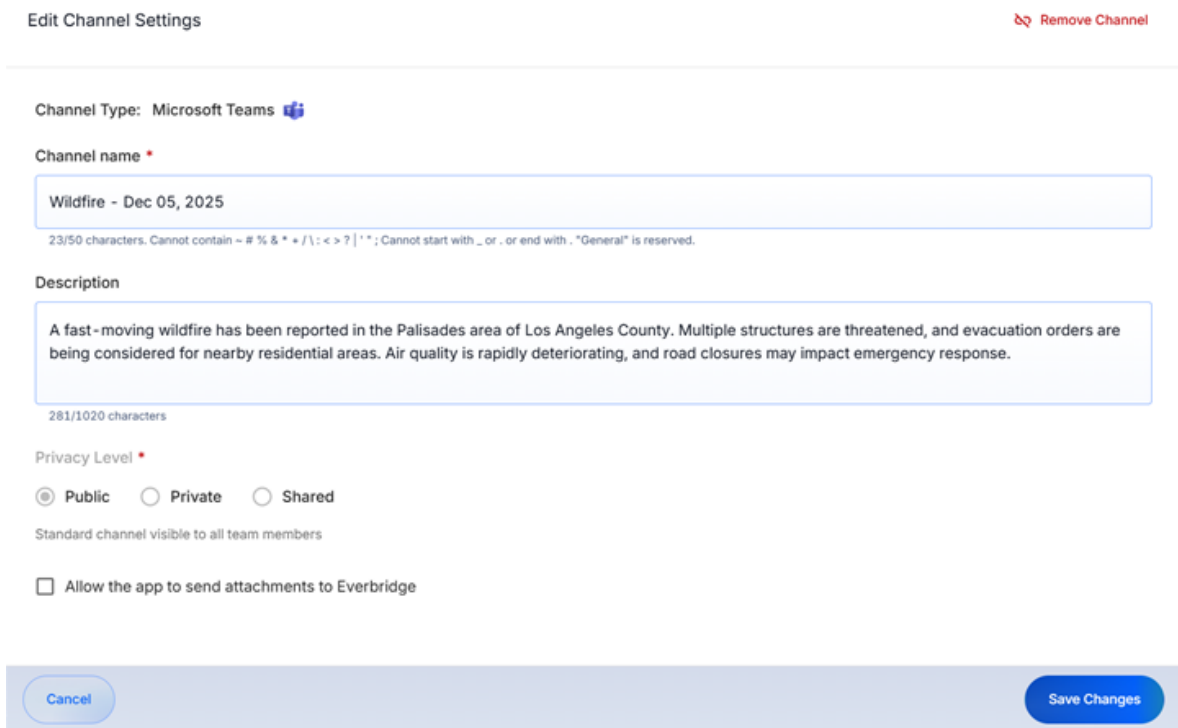


To edit the Channel's settings:

1. Open the Collaboration Channel.
2. Click **Edit Channel Settings** in the top-right corner.



3. The **Edit Channel Settings** panel will open. From there, users can update the Channel's Name and Description, or allow the app to send attachments to Everbridge.



4. Click **Save Changes**.

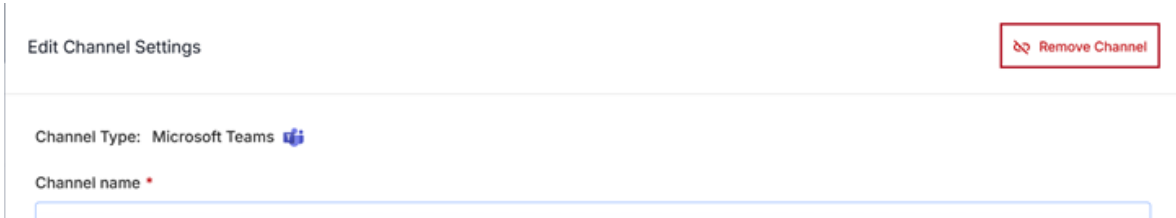
**IMPORTANT:** A Collaboration Channel's **Privacy Level** cannot be changed after launch. If a selection was made in error, remove the Collaboration Channel and recreate it with the correct Privacy Level.

## Removing a Collaboration Channel from a Response

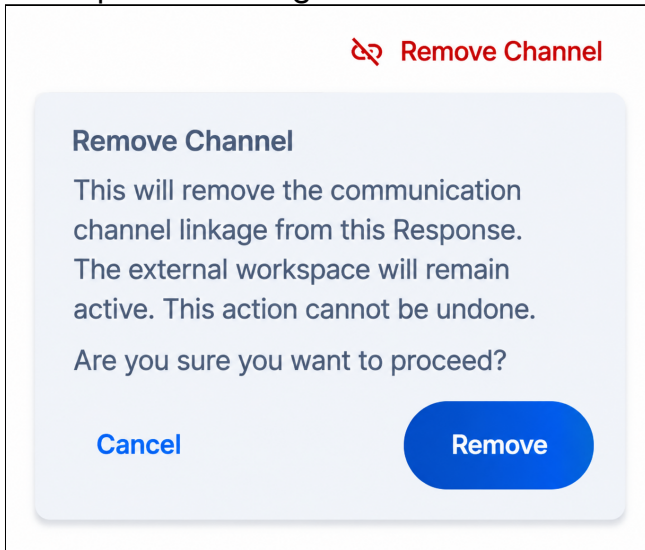
Users can remove a Collaboration Channel from a Response. To do so:

1. Open the Collaboration Channel.
2. Click **Edit Channel Settings**.

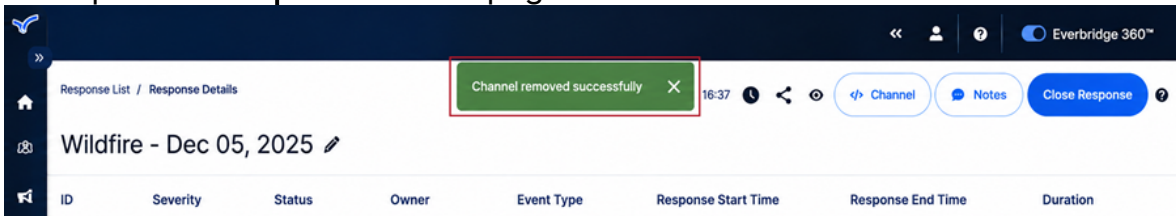
- On the **Edit Channel Settings** page, click **Remove Channel** in the top-right corner.



- A warning message will appear informing the user that this action will remove the Collaboration Channel from the Response while leaving the external workspace unchanged. Click **Remove** to confirm.



- The Collaboration Channel will close, and a success message will appear at the top of the **Response Details** page.



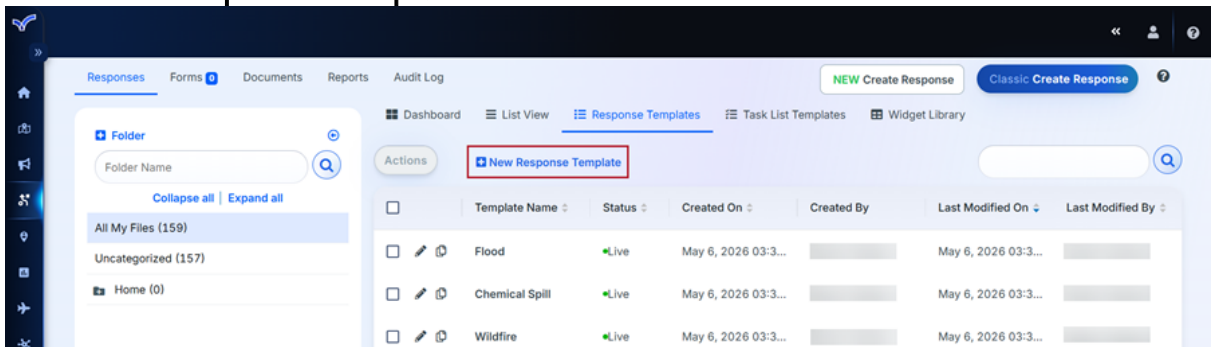
# Creating a Response Template

Responses can be created ad-hoc or from a Response Template, which allows Organizations to configure Templates for potential Responses before they happen. You can see the status and details of existing Response Templates from the **Response Templates** subtab. View the template details by clicking the template name.

**NOTE:** To edit a Response Template, click the **Pencil icon** from the **Response Templates** list. A template can be deleted by selecting the checkbox next to its title, then clicking **Delete**. You can also move the individual files into folders or add subfolders.

To create a new Response Template:

1. Select **Response Templates** from the **Responses** tab. The **Response Templates** page appears.
2. Click **New Response Template**.



3. The **Create a Response Template** page appears. If this template should be usable immediately upon creation, set its status to **Live**. If you plan to work on it and return later or collaborate with others, set the status to **Draft**.
  - Note that only Live templates can be selected when launching a Response.
4. Fill in the **Response Template** details accordingly. Required fields have a red asterisk (\*). You can fill in the fields now and return later to edit the template when you have additional information.

Refer to the field descriptions below:

Field	Description
<b>Status*</b>	Set the Status as either <b>Live</b> to make it usable immediately after saving, or <b>Draft</b> to save it as a draft to return to later.
<b>Template Name*</b>	Enter a unique Template Name (up to 800 characters).
<b>Title</b>	Enter a descriptive Title of the template (up to 800 characters).
<b>Description</b>	Enter a description. Maximum characters: 2500.
<b>Event Type</b>	Select the Event Type from the drop-down list.
<b>Owner</b>	Click the <b>Select an Owner</b> link and choose an owner.
<b>Location</b>	Select an address, drag the pin to change location, then click <b>Select This Location</b> . Use shapes on the map. Select a shape from the <b>Select Shapes</b> dialog and place it on the location. Repeat as needed, then click <b>Select These Shapes</b> .
<b>Location Name</b>	Enter a Location description. Maximum characters: 2500.

<b>Add Custom Fields</b>	<p>The template can include the Organization's Incident variables so that the Response is automatically filled in when launched.</p> <p>To add custom fields to the template:</p> <ol style="list-style-type: none"> <li>1. Click <b>Add Custom Fields</b>.</li> <li>2. Search and select the checkbox next to the desired Incident variables name(s).</li> <li>3. If required, select that checkbox as well.</li> <li>4. Click <b>Add</b>. The custom field is added to the bottom of the template.</li> </ol> <p>To reorder the custom field, click the Hamburger icon and while holding the mouse, drag the field to its new position.</p> <p>If the custom field was created by mistake, click <b>X</b> to delete it.</p>
<b>Folder</b>	<p>When launching a Response, a folder name can be included in the template. The launched Response is placed in the folder. A default folder is presented, which can be changed as needed. If the user has no folder permission, then the Response will be placed in the <b>Uncategorized</b> folder.</p>
<b>Turn off Notifications for Task assignment and Dashboard sharing</b>	<p>Select this checkbox to turn off the Notification when launching the Response and Dashboard sharing.</p>
<b>Auto-Launch</b>	<p>Select the checkbox to auto-launch the selected Task Lists and Incident Communications.</p>
<b>Task Lists</b>	<p>Click <b>Add</b> to add existing Task Lists. Select the desired checkbox and click <b>Save</b>. If needed, delete a Task List by clicking the X next to its name. See Adding Task Lists to a Response Template for details.</p>
<b>Incident Communications</b>	<p>Click <b>Add</b> to add existing Incident Templates. Select the desired checkbox and click <b>Save</b>. If needed, users can also delete an Incident Template by clicking the X next to its name. See Adding an Incident Communications Template to a Response Template details.</p>
<b>Documents</b>	<p>Click <b>Add</b> to add existing Documents. Select the desired checkbox and click <b>Save</b>. If already added, users can also delete a Document by clicking the X next to its name. See Adding Documents to a Response Template for details.</p>

<b>Trackers</b>	Click <b>Add</b> to configure Trackers for this Response Template. See Adding a Tracker to a Response Template for details.
<b>Dashboards</b>	Click <b>Add</b> to add existing Dashboards. Select the desired checkbox and click <b>Save</b> . If already added, users can also delete a Dashboard by clicking the X next to its name. See Adding a Dashboard to a Response Template for details.

5. Click **Save** when done. The new template will now appear in the list view.

**NOTE:** Response Templates can also be created by copying a preexisting one from the **Response Templates** tab.

<input type="checkbox"/>	Template Name	Status	Created On	Created By	Last Modified On	Last Modified By
<input type="checkbox"/>	Wildfire	Live	May 6, 2026 03:3...		May 6, 2026 03:3...	

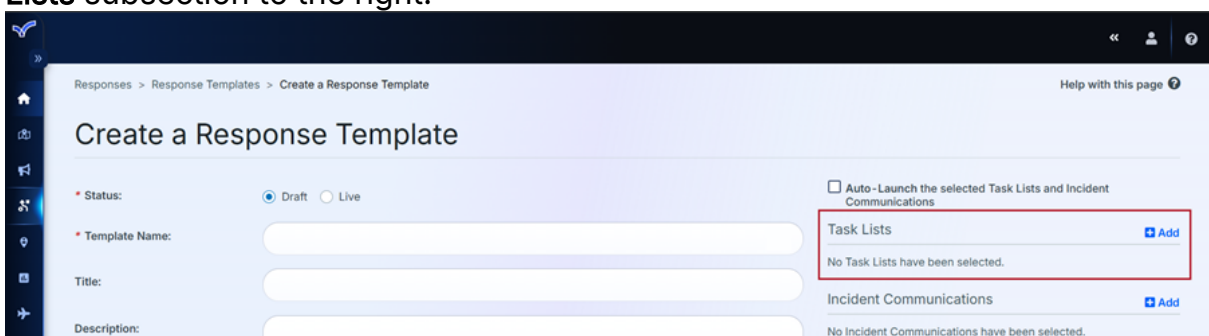
The copied Response Template will inherit all of the original configurations and items, like Documents or Trackers, which can then be adjusted as needed before saving the new version.

## Adding Task Lists to a Response Template

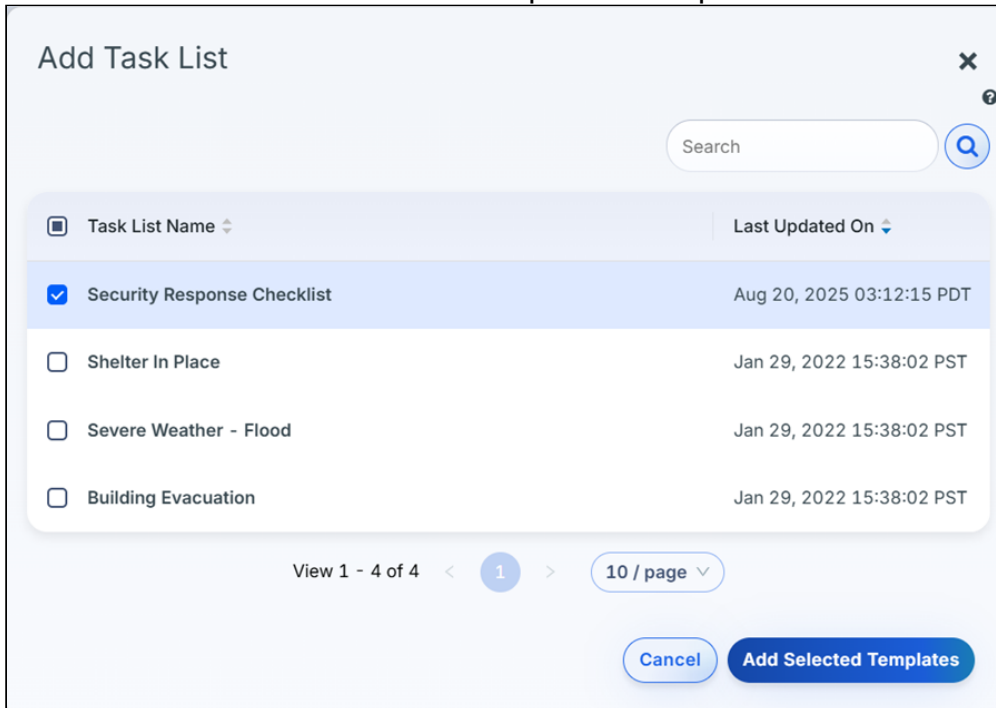
Tasks Lists can be attached to a Response Template, ensuring that any Responses that are launched from it will include them.

To add a Task List to a Response Template:

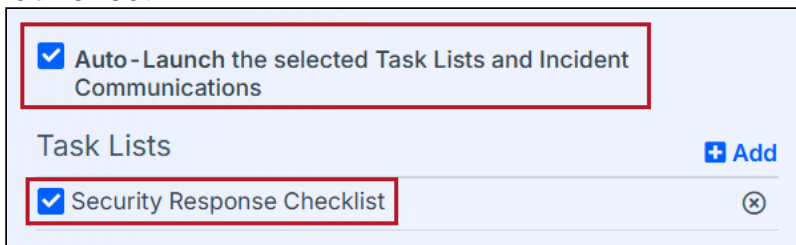
1. In either the **Create** or **Edit Response Template** flows, click **Add** in the **Task Lists** subsection to the right.



2. The **Add Task List** modal will open. Select the checkboxes for the Task Lists that should be included on the Response Template.



3. Click **Add Selected Templates**.
4. The modal will close, and the selected Task Lists will now appear in the Task Lists section to the right.
5. Optionally, select the **Auto-Launch the selected Task Lists and Incident Communications** checkbox to automatically launch the Task List whenever a Response is launched from this Response Template. If left unchecked, the Task List will still be included on new Responses, but it will need to be manually launched.



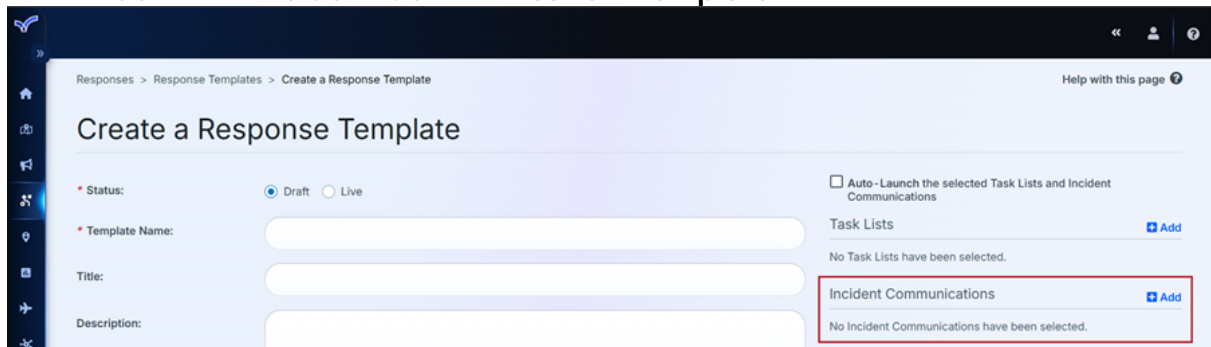
## Adding an Incident Communications Template to a Response Template

An **Incident Communications Template** can also be added to a **Response Template** to include all of the **variables** from the IC Template. This makes launching Incident Communications from the Response itself seamless and effortless while saving time spent on manually adding these variables again.

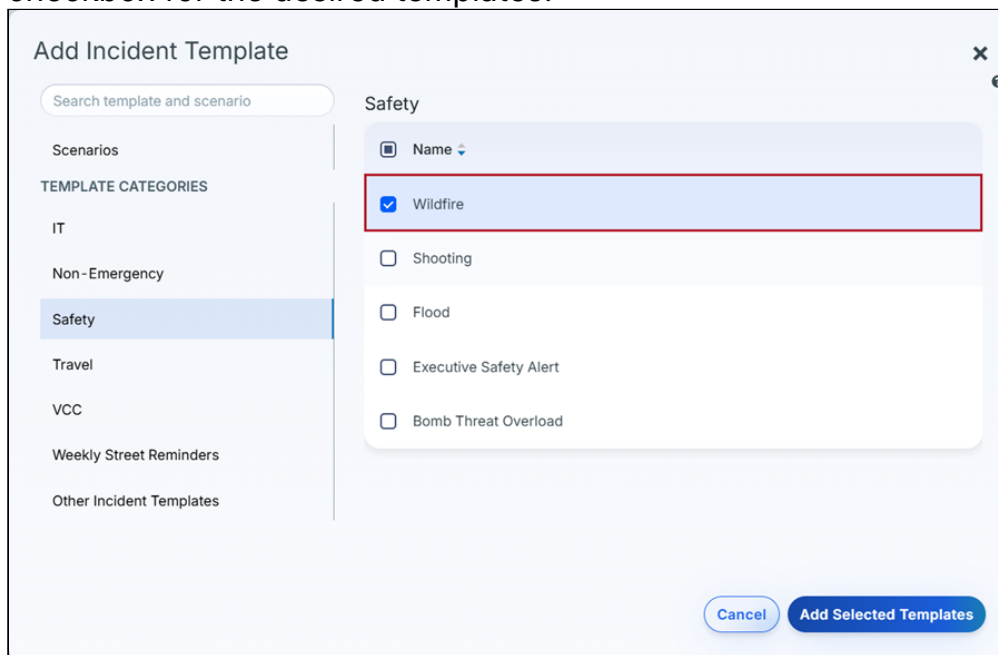
To insert an Incident Communications Template:

1. Enter the **Add or Edit Responses Template** flows.

2. Click **Add** in the **Incident Communication Template** subsection.

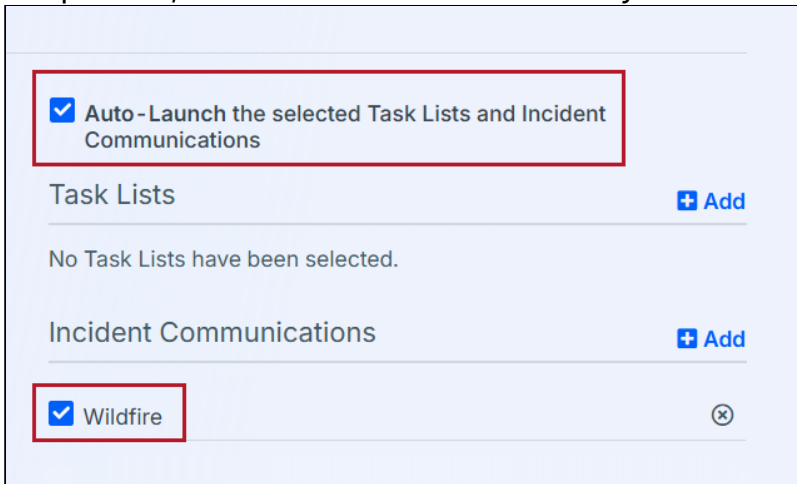


3. The **Add Incident Template** modal will open. Any existing Incident Communication Templates can be found categorized on the left. Select the checkbox for the desired templates.



4. Click **Add Selected Templates**.
5. The modal will close, and the newly-attached Incident Communications Template can be seen on the right.
6. Optionally, select the **Auto-Launch the selected Task Lists and Incident Communications** checkbox to automatically launch the Incident Communication whenever a Response is launched from this Response Template. If left unchecked, the Incident Communication will still be included on new

Responses, but it will need to be manually launched.

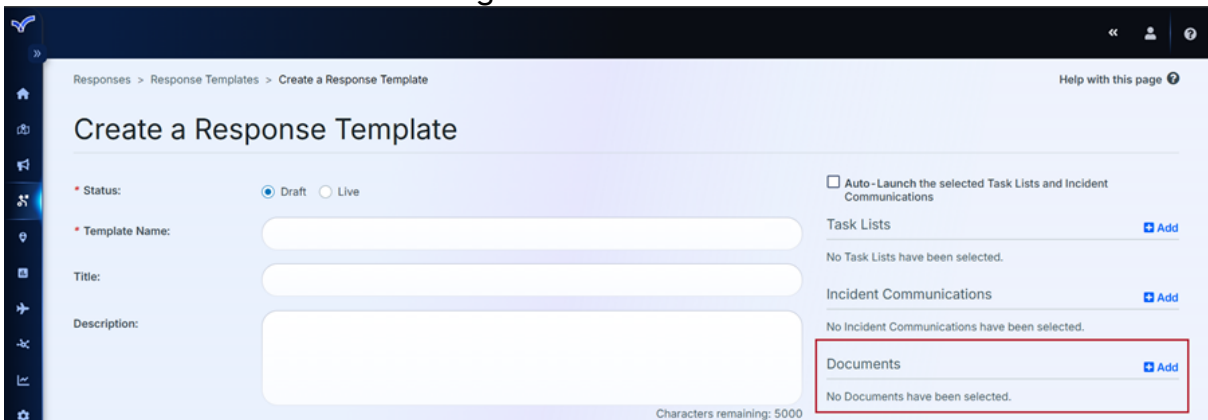


## Adding Documents to a Response Template

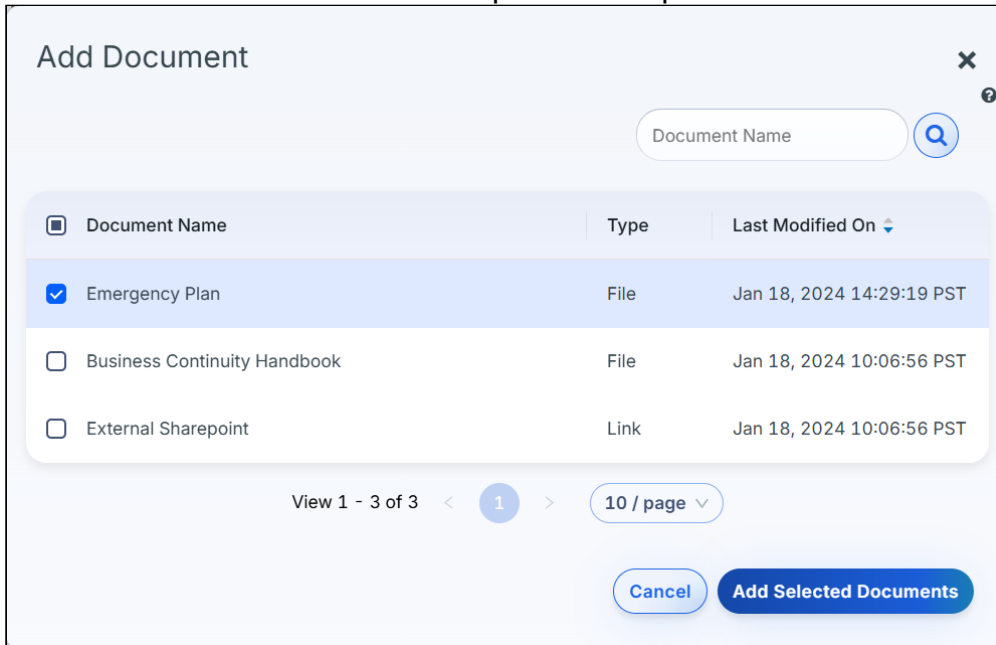
Important files, such as building escape routes or damage report checklists, can be attached under the **Documents** section of a Response Template to automatically retain those files on any Responses launched from it.

To add a Document to a Response Template:

1. In either the **Create** or **Edit Response Template** flows, click **Add** in the **Documents** subsection to the right.



2. The **Add Document** modal will open. Select the checkbox for any Document that should be added to this Response Template.



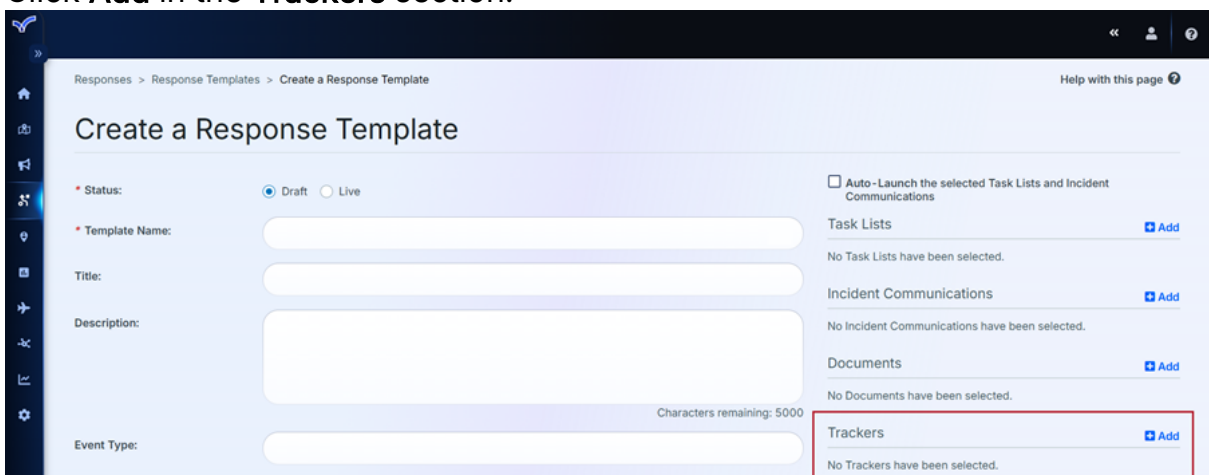
3. Click **Add Selected Documents**. The modal will close, and the Document can now be seen under the **Documents** subsection to the right. It'll be included on any Responses launched from this Response Template.

## Adding a Tracker to a Response Template

Trackers can also be added to or removed from Response Templates to streamline the future response process before an event occurs. However, remember that launching a Response Template doesn't automatically launch the Tracker. It will be available to launch from the **Trackers** tab of the Response.

To add a Tracker to a Response Template:

1. Depending on the need, navigate to either the **Create a Response Template** or **Update a Response Template**.
2. Click **Add** in the **Trackers** section.



3. Give the Tracker a name, and if applicable, set the following permissions for Member Portal contacts:
  - **Edit submission** - Allows changes to Tracker answers.

- **View all submissions** - Enables Members to view each other's submissions.
- **Create multiple submissions** - Enables Members to submit the Tracker multiple times. For example, for the Member and then on behalf of another Member.

The screenshot shows the 'Add Tracker' dialog box with a progress bar at the top. The first step, 'Enter Details', is active and highlighted with a blue circle. The second step, 'Select Form', and the third step, 'Select Contacts', are inactive and shown with white circles. Below the progress bar, there is a text input field for the name, which contains 'Damage Assessment Form'. Below this, there is a section titled 'Set the action permissions of the Member Portal contacts' with an information icon. This section contains three checkboxes: 'Edit submission', 'View all submissions', and 'Create multiple submissions', all of which are currently unchecked. At the bottom right, there are two buttons: 'Cancel' and 'Next >'. The 'Next >' button is highlighted in blue.

Click **Next**.

4. Select a form for this Tracker, then click **Next**.

The screenshot shows the 'Add Tracker' dialog box with the progress bar updated. The second step, 'Select Form', is now active and highlighted with a blue circle. The first step, 'Enter Details', and the third step, 'Select Contacts', are inactive. Below the progress bar, there is a text input field for the form name, which contains 'Damage Assessment'. To the right of the input field are two buttons: 'Edit' and 'Delete'. The entire input field and buttons are enclosed in a red rectangular border. At the bottom left, there is a '< Back' button. At the bottom right, there are 'Cancel' and 'Next >' buttons. The 'Next >' button is highlighted in blue.

5. Select the contact recipients by choosing individuals, groups, and/or rules.

The screenshot shows the 'Add Tracker' modal window. At the top, there is a title bar with a close button (X) and a help icon (?). Below the title bar is a progress indicator with three steps: 'Enter Details', 'Select Form', and 'Select Contacts'. The 'Select Contacts' step is currently active. Underneath, there is a 'Send to:' section with three selectable options: '10 Individuals', '3 Groups', and '3 Rules'. Below these options are two buttons: 'Preview Contacts' and 'Clear selected contacts'. There is also a checkbox labeled 'Turn off tracker notifications'. At the bottom, there are three buttons: '< Back', 'Cancel', and 'Add Tracker'.

- Tracker notifications can be disabled by selecting the **Turn off Tracker notifications** checkbox.
6. Click **Add Tracker**. The modal will close, and the new Tracker can be seen under the Tracker subsection to the right. It'll be included on any Responses launched from this Response Template.

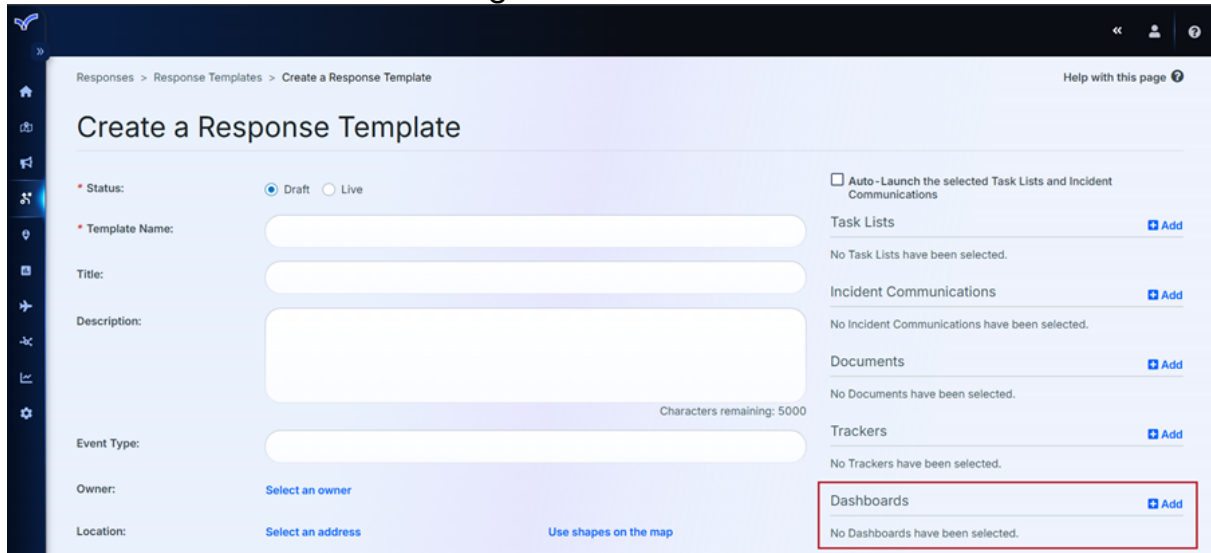
**NOTE:** If added to a template, the Tracker will be displayed in the **Response Template Export** report.

## Adding a Dashboard to a Response Template

Response Dashboards can be created and attached directly to a Response Template, allowing it to be automatically attached whenever a new Response is launched from it.

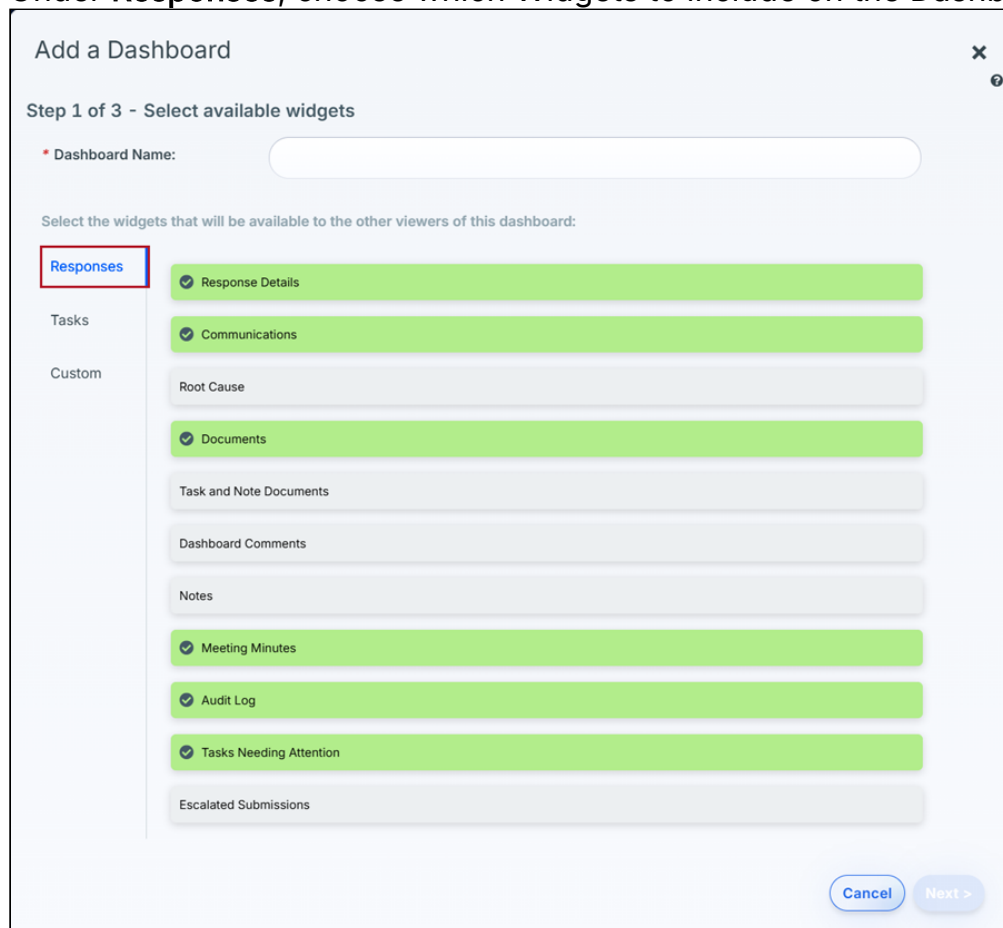
To add a Dashboard to a Response Template:

1. In either the **Create** or **Edit Response Template** flows, click **Add** in the **Dashboards** subsection to the right.



The screenshot shows the 'Create a Response Template' interface. On the right side, there are several sections for adding content: Task Lists, Incident Communications, Documents, Trackers, and Dashboards. Each section has an 'Add' button. The 'Dashboards' section is highlighted with a red box, indicating the next step in the process.

2. The **Add Dashboard** modal will open. Give the new Dashboard a name that clearly describes its intended purpose.
3. Select the desired Widgets to add to this Dashboard.
  - Under **Responses**, choose which Widgets to include on the Dashboard.



The 'Add a Dashboard' modal is shown, with 'Step 1 of 3 - Select available widgets'. The 'Responses' category is selected, and several widgets are listed with checkboxes. The 'Responses' category is highlighted with a red box.

Category	Widget	Selected
Responses	Response Details	Yes
	Communications	Yes
Tasks	Root Cause	No
	Documents	Yes
	Task and Note Documents	No
	Dashboard Comments	No
	Notes	No
	Meeting Minutes	Yes
	Audit Log	Yes
	Tasks Needing Attention	Yes
	Escalated Submissions	No

The following Widgets are available for selection and configuration:

- **Response Details** - Displays key details about the Response.
- **Incident Notifications** - Displays information about Incident Notifications associated with the Response.

- **Root Cause** - If applicable, specifies the Root Cause of the Response.
- **Documents** - Displays any included Documents.
- **Task and Note Documents** - Displays any Documents attached to Tasks or Notes.
- **Dashboard Comments** - Users can add Comments about a single Dashboard in the Response. Dashboard Comments are only shared with others who have access to the Dashboard. Users can edit or delete their own Comments, while Administrators can edit or delete those left by others.
- **Notes** - Displays Notes related to the Response. Users can edit the Widget title and add Notes to the dashboard, including up to 4 attachments (images and other file types). Notes are shared across the Response. Users can edit or delete their own Notes, while Administrators can edit or delete those left by others.
- **Meeting Minutes** - Displays a record of what happened during a meeting.
- **Audit Log** - Allows users to see a Response Audit Log, Dashboard Audit Log, or both. They can also export these audit logs.
- **Tasks Needing Attention** - Displays the Tasks that need attention. Click a Task to see its Task List Details, from which you can change the status of a Task List item. You can also add Comments to a Task, including a maximum of 4 files.
- **Escalated Submissions** - Displays any Escalated Submissions associated with this Response.

- Under **Tasks**, select any Task Lists that should be included on the Dashboard as Widgets, or select **All Task Lists**.

**Add a Dashboard** ✕ ?

Step 1 of 3 - Select available widgets

• Dashboard Name:

Select the widgets that will be available to the other viewers of this dashboard:

Responses

All Task Lists

**Tasks**

Custom

Browse and Select Task Lists (7)

Show: All ▾

- Facility Lock Down
- Hurricane Preparedness - HR
- Pre -Hurricane Preparation Activities
- Communication Tasks
- Hurricane Activation - CMT
- Hurricane Recovery - Facilities
- Incident Response Team

- Under **Custom**, either:

- Click **Create** to create a new Widget from scratch.

The screenshot shows a dialog box titled "Add a Dashboard" with a close button (X) and a help icon (?) in the top right corner. Below the title, it says "Step 1 of 3 - Select available widgets". There is a text input field for "Dashboard Name:". Below that, it says "Select the widgets that will be available to the other viewers of this dashboard:". Under "Responses", there are two buttons: "Create" (highlighted with a red box) and "Add from Library". Under "Tasks", it says "Browse and Select Custom Widgets (0)". There is a search bar labeled "Search Custom Widget" with a magnifying glass icon and a "Show: All" dropdown menu. The main area is empty, showing a "No Data" message with a folder icon. At the bottom right, there are "Cancel" and "Next >" buttons.

- Click **Add from Library** to open the Organization's Widget Library, where any existing Widgets can be found categorized by type (Custom Text, Webpage, Widget Comment). Add any desired

Widgets, then click **Add to Dashboard**.

**Add Widget from Library**

All Custom Text Webpage Widget Comment

Search Reset

<input type="checkbox"/> Widget Name	Type	Last Modified On
<input checked="" type="checkbox"/> Custom Widget - Comment	Widget Comment	Jun 11, 2024 02:02:27 EDT
<input checked="" type="checkbox"/> Custom Widget - URL	Webpage	Jun 11, 2024 02:02:07 EDT
<input type="checkbox"/> Custom Widget Text	Custom Text	Jun 11, 2024 02:01:42 EDT
<input type="checkbox"/> Document Library	Widget Comment	Nov 14, 2024 00:50:24 EST
<input checked="" type="checkbox"/> EB Policy	Webpage	Jun 11, 2024 02:37:30 EDT
<input type="checkbox"/> Everbridge Privacy Policy	Custom Text	Jun 6, 2024 05:52:37 EDT
<input type="checkbox"/> Generic Widget Comment	Widget Comment	Apr 5, 2024 08:37:59 EDT
<input type="checkbox"/> Generic Widget Comment Special	Widget Comment	Jun 6, 2024 01:51:38 EDT
<input type="checkbox"/> Hello	Custom Text	Feb 26, 2025 14:11:23 EST
<input type="checkbox"/> g	Custom Text	Feb 21, 2025 01:08:17 EST

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Once added to a dashboard, any changes are relegated to this dashboard view and do not affect the library version

Cancel **Add to Dashboard**

4. Click **Next** once all of the desired Widgets have been chosen to specify which users should have access to this new Dashboard. Select either:
- **All Users** - Make this Dashboard available to all Organizational users.

**Add a Dashboard**

Step 2 of 3 - Share with users

Which users of this portal are permitted to see this dashboard?

**All Users**

Private - Organization administrators and invited users can access the dashboard

Cancel < Back Next >

- **Private** - Invite specific roles and/or Users to access this Dashboard. Note that Organization Administrators will have access by default.

The screenshot shows a modal window titled "Add a Dashboard" with a close button (X) and a help icon (i). The current step is "Step 2 of 3 - Share with users". Below the title, it asks "Which users of this portal are permitted to see this dashboard?". There are two radio button options: "All Users" (unselected) and "Private - Organization administrators and invited users can access the dashboard" (selected). Under the "Private" option, there are two columns: "Roles" and "Users". The "Roles" column has a "Selected (1)" count and a "Select Roles" button. Below it, "Internal Everbridge Stakeholder" is listed with a radio button. The "Users" column has a "Selected (3)" count and a "Select Users" button. Below it, "Sarah", "Jency", and "Emma" are listed, each with a radio button. At the bottom right, there are three buttons: "Cancel", "< Back", and "Next >".

5. Click **Next** to select the Contacts who will have access to this Dashboard in their Member Portal. They can be selected as Individuals or via Groups and Rules.

The screenshot shows the same modal window, now at "Step 3 of 3 - Share with contacts". It asks "Which contacts are permitted to see this dashboard on the Member Portal?". There are three large buttons: "2 Individuals", "1 Groups", and "1 Rules". A red box highlights these three buttons. Below them, there is a "Preview Contacts" label and a "Clear selected contacts" button. At the bottom, there is a blue information banner with a question mark icon and the text: "Mobile push, SMS and email are default for dashboard sharing notifications path. Users can narrow the path to one only in alert templates settings." At the bottom right, there are three buttons: "Cancel", "< Back", and "Save".

6. Click **Save**. The modal will close, and the Dashboard will now be displayed in the **Dashboards** section of the Response Template. Whenever a Response is launched using this template, it'll automatically include this Dashboard on its

# Response Details page.

The screenshot shows the Everbridge 360 interface for a response titled "Earthquake". The page is divided into several sections:

- Header:** "Responses / Response Details", "Response ID: CE-000-015" (Active), and a "Close Response" button.
- Navigation:** A sidebar on the left with icons for Home, Notes, Meeting, Assets, and Tracker. A top navigation bar includes "Manage Response", "Time-Sensitive Items" (highlighted with a red box), and "Configure".
- Response Details Panel:**
  - Response Start Time:** Nov 13, 2025 13:56:49 PST
  - Response Close Time:** -
  - Response Owner:** [Redacted]
  - Task and Dashboard Alerts:** On
  - Description:** Everbridge sample response
  - Location Name:** -
  - Folder:** -
- Documents Panel:** Titled "Documents (1)", it contains a table with one document:

File Name	File Size
Evacuation Plan.docx	11.95 KB

# Managing a Live Response

## Viewing a Response

To see details of a Response:

1. From the **Dashboard**, double-click an Active Response, or from the **List** page, click the desired Response title. The corresponding **Response Details** page appears.
2. From there, the **Manage Response** will open, where users can review crucial details about this Response.

The following details can be found on this page:

Field	Description
Upper left-hand corner	Response Title Status: <b>Active</b> or <b>Closed</b>
Publish   Preview	Click the <b>Publish</b> link to select Contacts (Individuals, Groups, and Rules) who are permitted to see this Response landing page in the Member Portal in read-only mode. Then click the <b>Publish</b> button.  Click <b>Preview</b> to see the selected Contacts.  To publish multiple Responses, from the List View of the Response, select the checkboxes of the desired Responses, click the <b>Actions</b> menu, and select <b>Publish to Contacts</b> . (To stop publishing, select <b>Unpublish</b> .)
Close Response	Click to close the Active Response.
Notes	Click the <b>Notes</b> icon and enter text. Users can attach up to four files to the Note, which are not limited to images only. Each Note can be seen at the bottom of the page, including the name of the person who wrote the Note, the date and time, and the Note text.
Meeting	Click the <b>Meeting</b> icon to open a text field where meeting minutes can be left. Meeting templates can also be created here to use later.
Situation Report	Click the <b>Situation Report</b> icon. Users can add an Executive Summary. Then, click <b>Preview</b> to see the Situation Report in a document format, which can be exported to PDF. See <a href="#">Managing the Situation Report</a> .
Form Report	Click the <b>Form Report</b> icon to see the Form Reports for a Response.
Audit Log	Click the <b>Audit Log</b> icon to generate the Audit Log. When done, click <b>Export</b> . Click the link in the email and the Audit

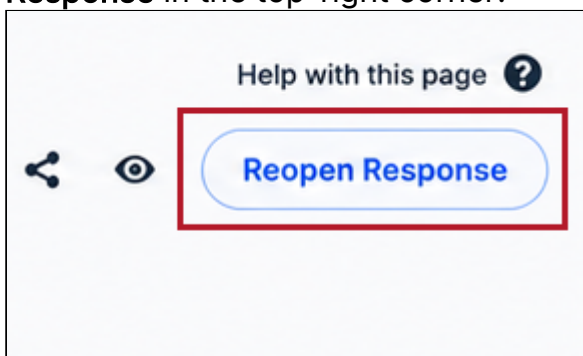
	<p>Log appears in CSV format. See <a href="#">Viewing_the_Response_Audit_Log</a>.</p> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p><b>NOTE:</b> If two or more email addresses are indicated as Delivery Methods for a user, only the one higher in the Delivery Method sequence is used.</p> </div>
Assets	<p>Click the <b>Assets</b> icon to view the affected Assets and Contacts. Select the Assets and/or Contacts checkbox to enable drill-down for active Responses in Member Portal. Otherwise, the Data Views are read-only.</p> <p>See the Data Views of any Asset or Contacts by clicking the data view name (it is a link). A user of the Member Portal can drill down only on the created Data Views.</p> <p>From the right-hand pane, select an item where you can download a CSV file. From the left-hand pane, you can download multiple Asset Types (or Contact Record Types) into a ZIP folder. Each type contains different column headings, so each type is an individual CSV file in the zip folder. When an individual Asset Type or Contact Record Type displays zero (0), no CSV file is created.</p> <p>To create a new data view, click <b>Add Item</b>. Enter a name for the data view, select the group (Assets or Contacts) from the drop-down list, then select your Asset Type or Contact Record Type.</p>
Response Details	<p>View or edit the Response details:</p> <ul style="list-style-type: none"> <li>• Response Start Time</li> <li>• Response Close Time</li> <li>• Response Owner</li> <li>• Description</li> <li>• Map</li> <li>• Folder</li> </ul>
Task Lists (N)	<p>(N) represents the number of Task Lists in the Response. Users can see the Task Lists associated with this Response, as well as add more Task Lists and launch unlaunched Task Lists. Task Lists can also be deleted from the <b>Response Details</b> page. For details, see <b>Manage Task Lists in Response Details</b> below.</p>
Incident Communications (N)	<p>(N) represents the number of Incident Templates in the Response. Users can see the Incident Templates associated with this Response, as well as add more Incident templates, add existing Incidents, launch unlaunched Incidents, schedule unlaunched Incidents, and add pre-scheduled Incidents. Users can also remove Incident Templates from the <b>Response Details</b> page.</p>

Root Cause	A data field that identifies the <b>Root Cause</b> of a Response. It's shareable via the Dashboard.
Documents (N)	(N) represents the number of Documents in the <b>Document Library</b> . Users can see the Documents associated with this Response, as well as add more Documents, download existing Documents, and upload additional Documents. Documents can also be removed from the <b>Response Details</b> page.
Task and Note Documents (N)	(N) represents the number of Documents in the Document depository. All of the Documents are in one place.
Linked Contents (N)	(N) represents the number of linked content to the Response, such as escalated requests.
Notes (N)	(N) represents the number of Notes in the Response. Depending on the Notes added to this Response, each can be seen by clicking the <b>Notes</b> tab in the left-hand pane.

## Closing or Reopening a Response

To close or reopen a Response:

1. From the **Response Details** page of a Response, click **Close Response** in the top-right corner.
2. The **Close Response** dialog is displayed. Click **Close Response** again to confirm.
3. From the **Response Details** page of a closed Response, click **Reopen Response** in the top-right corner.



4. The **Reopen Response** dialog is displayed. Click **Reopen Response** again to confirm. All previously shutdown elements such as Task Lists, Incidents, Notes, and documents are reactivated.

## Searching for a Response

Users can search for Responses by keywords, save the filters, and download the Response Details to a CSV file.

### Searching by Keyword

To search for an Response by keyword:

1. From the **Response Home Page**, select the **List view**.
2. In the **Search** field, type your keyword for the desired Response using Response Title, Response Type, Description, Location Name, or Custom Fields.
3. Click the **Search** icon. (Leave the search filter as-is if you want to save the filter and/or download to CSV.)

## Saving a Search Filter

To save your search filter:

1. Select the **Cogwheel** icon to the right of the **Search** field.
2. The **Manage Filters** menu appears. Click **Save Current Filter**.
3. Type a filter name.
4. Click **Save**. Note that the filter is saved only for the user making the change.

**NOTE:** The maximum number of saved filters is 200 per user.

## Downloading a Response to CSV

To download your Response to CSV:

1. Select the **Download** icon to the right of the **Search** field. The **Download CSV** message appears.
2. Click **OK** to continue working while waiting for an email Notification.
3. Once the **Response Download** email is received, click the link to open the CSV file.

## Managing Incident Communications in Response Details

From the **Response Details** page of a Response, users can add and launch one or more Incident Communication Templates, as well as attach existing or scheduled Incidents.

Incident Communications (2)								<a href="#">Add Incident Template</a>	<a href="#">Add Existing Incident</a>	<a href="#">Add Scheduled Incident</a>
Status	Mode	Name	Open Duration	Opened On	Opened By	Last Updated On				
Launch		Bomb Threat Overload	-	-	-	-				
Launch		Employee Wellness C...	-	-	-	-				

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## Adding an Incident Template to a Response

To add an Incident Template to a Response:

1. From the **Response Details** page, click **Add Incident Template**. The **Add Incident Template** dialog displays the Incident templates.
2. Select the matching **Template Category** on the left-hand side of the dialog.

3. Select one or more of the desired Incident Template names from the list of existing templates on the right-hand side of the dialog.
4. Click **Add Selected Templates**. The selected Incident Templates are added.

## Launching Incident Template for a Response

To launch an Incident Template for a Response:

1. From the **Response Details** page, click **Launch** from the Incident Template to send. The **Launch Incident** page appears.
2. Enter details for Step 1 of 2 and click **Next**.
3. Enter and verify the Incident Review information.
4. Click **Send**.

## Scheduling an Incident for a Response

To schedule an Incident for a Response:

1. From the **Response Details** page, click **Launch** from the Incident Template to schedule. The **Launch Incident** page appears.
2. Enter details for step 1 of 2 and click **Next**.
3. Enter and verify the Incident Review information, then click **Schedule**.
  - The scheduled Notification will use the values as configured here. Any change made to the template later will not apply.
4. Enter the following:
  - **Schedule Name** - Change the name of the Incident as needed.
  - **Date** - Click the **Calendar** icon and select the date to schedule the Incident.
  - **Send time** - Click the **Calendar** icon and enter the Hour and Minutes.
5. Optionally, select the **Close Incident after successful send** checkbox.
6. Click **Schedule**. In the **Response Details** page, you can see that the Incident is scheduled.

## Adding a Scheduled Incident to a Response

If Incidents have already been scheduled, they can be added to a Response directly from the **Response Details** page.

To add a scheduled Incident to a Response:

1. From the **Response Details** page, click **Add Scheduled Incident**. The **Add Scheduled Incident** dialog displays the Incident.
2. Select the checkboxes of the desired Incidents.
3. Click **Add**. The scheduled Incident(s) are added to the **Response Details** page.

## Adding an Existing Incident to a Response

To add an existing Incident to a Response:

1. From the **Response Details** page, click **Add Existing Incident**. The **Add Existing Incident** dialog displays the Incidents.
2. Select the checkboxes of the desired Incidents.

3. Click **Add Selected Incidents**. The Incidents are added to the **Response Details** page.
4. From the **Action** menu, select the type of action:
  - Update
  - Close With Notification
  - Close Without Notification

## Documents in Response Details

Besides downloading documents from the **Documents** (nn) pane, you can add existing documents from the Document Library, and upload new documents to the Document Library. Common file formats include the following, with a maximum file size of 50 MB:

- Document formats such as docx, pdf, xlsx, and cvs.
- Presentation formats such as pptx.
- Media formats for images, audio, and video such as png, mp3, and mp4.
- Other file formats such as ics (calendar).

### Adding an Existing Document

To add an existing document:

**TIP:** You can add an existing document from a Response's Response Details page, or when you launch a new Response, create a Response template, or create a Task.

1. From the **Documents** section or pane, click **Add Document**. The **Add Document** dialog appears.
2. Select one or more desired documents from the existing documents.
  - To select multiple documents, select a checkbox of the first desired document, then hold down **CTRL** and select the other checkboxes you want.
3. Click **Add Selected Documents**.

### Uploading a New Document

To upload a new document to the **Responses Details** page:

1. From the **Responses Details** page, in the **Documents** section, click **Upload New**. The **Upload New** page appears.

Upload New

Upload  Link

\* Document Name: ⓘ

\* File: ⓘ

**Browse...** You can upload up to 15 files, with a maximum single file size of 50 MB.

Cancel Add to Event and Document Library Add to Event Only

2. Do one of the following:
  - Click **Upload**, enter a Document Name, and Browse to the file. You can upload up to 15 files. The maximum single file size is 50 MB.
  - Click **Link**, enter a Document Name, and enter the URL. Make sure to precede your website address with the `https` protocol.
3. Click the Information icon next to the File label to see the currently-supported file formats.
4. Click either **Add to Response and Document Library** or **Add to Response Only**.
5. Click **Done**.

**NOTE:** To add the document to the Document Library, repeat steps 1 through 3 above, click either **Add to Response Only** or **Add to Response and Document Library**, then click **Done**.

## Managing Task Lists in Response Details

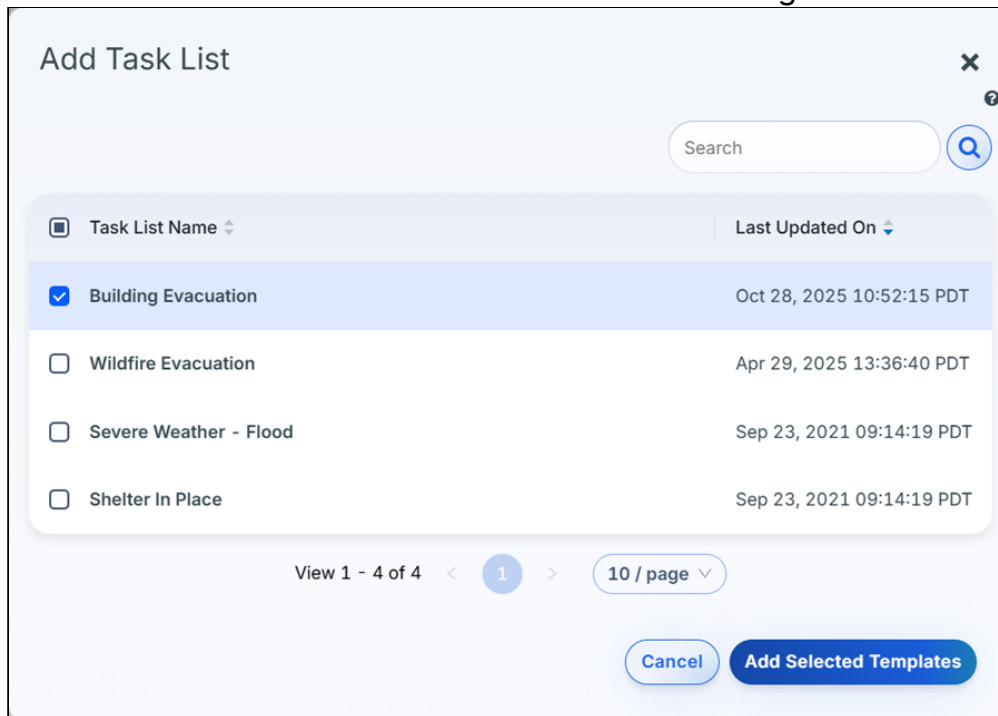
From the Response Details page of a Response, you can add one or more Task Lists, edit existing Task Lists, and launch Task Lists.

### Add a Task List to a Response

To add a Task List to a Response:

1. From a Response's **Response Details** page, click **Add Task List**. The **Add Task List** dialog appears.

2. Select the desired Task Lists from the list of existing Task List templates.



3. Click **Add Selected Templates**. The Task List(s) is added.

## View Response Task List Details

To view the Task List Details of a Response:

1. From a Response's **Response Details** page, click the name of a Task from the **Task Lists** pane.
  - You can only select the **Task List Details** if the Task has been launched.
2. Edit the following fields:
  - Change the Owner. Click **Edit** and select a different owner.
  - Change the Status. Select from the menu.
  - From the **Actions** menu, you can:
    - Add a Comment to add Notes to the Task.
    - View and Edit Task Details.
      - If the Status of a Task is **Done**, you can view the Task details.
      - If the Status of a Task is not **Done**, you can edit the Task details.
    - Set Timer, where you can set the Timer Type (Relative or Date), enter how much time the Task must be completed within (up to 530 Hours and 59 Minutes), and Escalate to the Task List Owner or a Custom Selection, as well as turn off the timer Notification.
    - Remove Timer altogether if the Timer has been set.
    - Delete a Task if the Task's status is **Not Started**.
  - If used, click Show (nn) Comments, where nn is the number of comments. Alternatively, click the link Expand Comments. Conversely, click either Hide (nn) Comments or Collapse Comments.
  - If available, click the Download icon to download a document.
  - Click **Manage Columns** to add or remove custom columns.
    - **Status, Task Name, Comments, and Documents** are always displayed.

- Click **New Task** to add another Task to the Task List. For details, see the procedure **Edit a Task List From the Response Details**, next.
  - If **Auto Refresh** is turned on, you cannot change the Task status or add comments.
- 3. Prioritize the Task items in the list.
  - Move each Task up or down based on its importance.
  - Sort the Task items in a list by the column header. Sorting does not change the priority order of the Tasks.

## Editing Task List from Response Details

To edit a Task List from the Response Details:

1. From the **Responses tab**, select **Task List Templates**.
2. Click the Pencil icon of the Task List you want to edit. The **Edit Task List** dialog appears. You can replace existing values and add additional Tasks.
3. Modify the Task List as needed. (See the following procedures.)

## Updating Task List Title

To update the Task List Title or Description:

1. Select the text you want to replace.
2. Type the updated text.
3. When you are done with all changes, click **Save**.

## Selecting an Owner

To select an Owner:

1. Click **Edit** next to the owner's name you want to change. The **Select an Owner** dialog appears.
2. Select the new owner by Individual, Group, or Rule.
  - **By Individual** - When you change the name of the individual owner, both the original owner and the new owner are sent a Task Assignment Alert via SMS or email about the reassignment.
  - **By Group** - When you change the name of the owner to a group, both the original owner and Contacts comprising the new group are sent a Task Assignment Alert via SMS or email about the reassignment.
  - **By Rule** - When you change the name of the owner to a rule, both the original owner and the Contacts comprising the rule are sent a Task Assignment Alert via SMS or email about the reassignment.
3. Click one of the following:
  - **Select** - select the individual owner.
  - **Multiple Tasks** - assign the selected person to all Tasks selected in the Assign to Multiple Tasks dialog and click **OK**.
4. When you are done with all changes, click **Save**. The save will trigger a Task assignment alert.

## Updating the Task Owner

To update the owner of a Task:

From the **Task List Details**, click **Edit** next to the Owner field. The **Select an Owner** dialog appears.

Select the updated owner and click **Select**.

## Removing the Owner from a Task

To remove an owner's name from a Task:

1. Select **Remove** next to the owner's name you no longer need. The **Select an owner** link appears. A Task Assignment Alert is sent to the removed owner via SMS and/or email.
2. When you are done with all changes, click **Save**.

## Adding Documents to Tasks

To add a Document to a Task:

1. Click **Add a file** next to the Task you want to modify. The **Add Document** dialog appears.
2. Select a document from the Document Library.
3. Click **Add Selected Documents**.

## Deleting a Task

To delete a Task from the Task List:

1. Click the **X** in the row of the Task that you want to be removed. The Task is immediately removed.
2. When you are done with all changes, click **Save**.

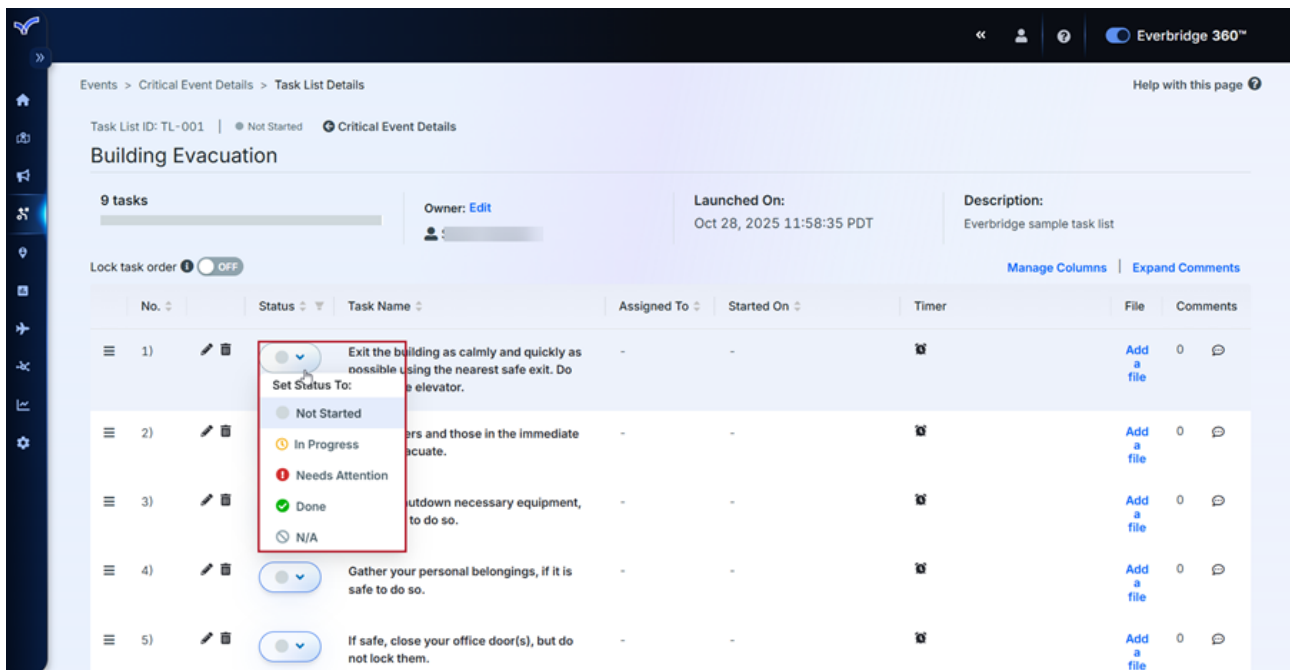
## Creating a Task Timer

To create a Task Timer:

- Click on the **Timer Icon** on the desired Task within the Task List. The **Set Timer** popup will appear.
- Set the **timer duration**.
- Set the escalation point of **Contact**. This person will be alerted if the Task isn't completed before the timer expires.
- Click **Save**.

## Updating Task Lists from the Manager Portal

Incident Administrators and Incident Operators of each Task can update their Task Lists from the Manager Portal.



To launch a Task List from the Response Details:

1. Click **Launch** in the row of the desired Task List. The **Launch Task List** dialog appears. A link will be emailed to the following individuals or groups:
  - Task List owner
  - Individual owners of each Task
2. Click **Launch Task List** when you are certain you want to continue.
  - On the **Response Details** page, the number of Tasks completed of the total Tasks comprised in the Task List appears.
    - For example, **Completed Tasks: 0 of 7** indicates no Tasks of seven have been completed.
3. The Task List owner and individual owners of each Task are notified via email.
  - **Task List Owners** - Task List Owners see all Tasks in the Task List.
  - **Task List Assignees** - Task List Assignees see only the Tasks to which they are assigned. The other Tasks are grayed out. Task List Assignees are individuals, all Contacts in a group, or all Contacts in the rule.
4. In the email that the owners receive, there are two links. perform the actions below for each link.
  - **Please click here to acknowledge receipt of this message**—In SMS, reply YES to confirm receipt. In email, click the link to acknowledge receipt.
  - **Click here for more information on this alert**—In SMS, tap the link provided in the text message. In email, click the link and the Contact's Task List appears in their Task List page of the Member Portal after logging in. In SMS, tap the link and the Contact's Task List appears in their Task List page of the Member Portal after logging in.
5. Proceed to the **Updating Task Lists from the Member Portal** section below.

## Updating Task Lists from the Member Portal

Assignees of each Task can update their Task status from the Member Portal. When a Task is launched, the Contacts receive an assignment email or SMS message.

When they click the link for more information, the details appear from their Member Portal. The Task details page has been designed to be responsive so that it will fit into the smaller mobile screen.

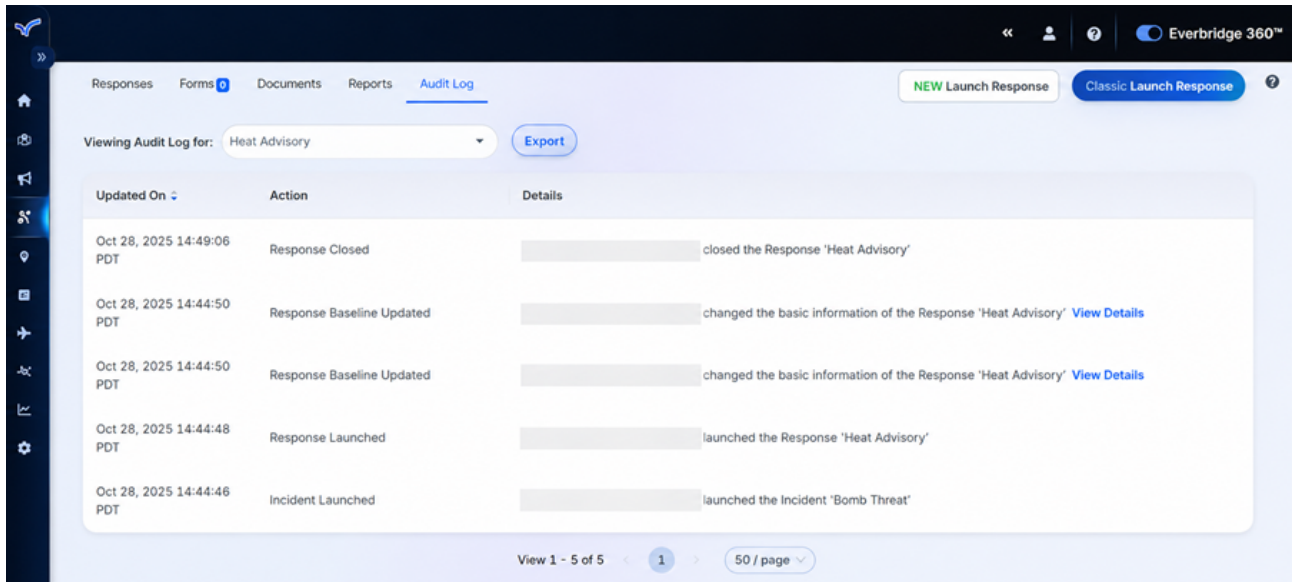
To update Task Lists from the Member Portal:

1. From a Task, select the drop-down arrow to set the status:
  1. **Not Started**
  2. **In Progress**
  3. **Needs Attention** — A comment is required (up to 5,000 characters and four files).
  4. **Done**
  5. **N/A** — Indicates that the Task isn't applicable.
2. If a Task has a document, click the **Download** icon.
3. Click the **Comment** icon to add Note text of up to 5,000 characters. Click **Add Comment** when done. After clicking the Comment icon, you can also add up to four files, one at a time.
  - The Task status number in the Completed box changes if a Task is Done.
  - If needed, users can delete or edit their own Comments, while Administrators can also edit those left by others.
4. Click **Back** when you are done. A list of Tasks and the status of each Task are displayed under **My Tasks**.
5. Select the other subtabs to see the lists of Tasks under them:
  - **Not Started**
  - **In progress**
  - **Needs Attention** — A comment is required (up to 5,000 characters and four files).
  - **Done**
6. From the menu, select the desired status for any of the Tasks.
7. Download any document by clicking its **Download** icon.
8. Logout when you are done.

# Viewing the Response Audit Log

From the **Audit Log** tab, users can view a log for a specific Response. The top-most audit log is the default.

Users can select the Response they want to view from the menu.



## Exporting the Audit Log

The Audit Log of a Response can be exported. To do this:

1. From the **Audit Log** tab, select the Response. Or, from the **Response Details** of a Response, click the **Audit Log** icon. Then click **Export** to generate the audit log.
2. Click **View Details** to see the Task Comments, Notes (and their attachments), and Response details.

The system is designed to accommodate large amounts of data, so it will not directly download. When the file is generated, the user will be notified via email. Click the link in the email and the Audit Log appears in CSV format.

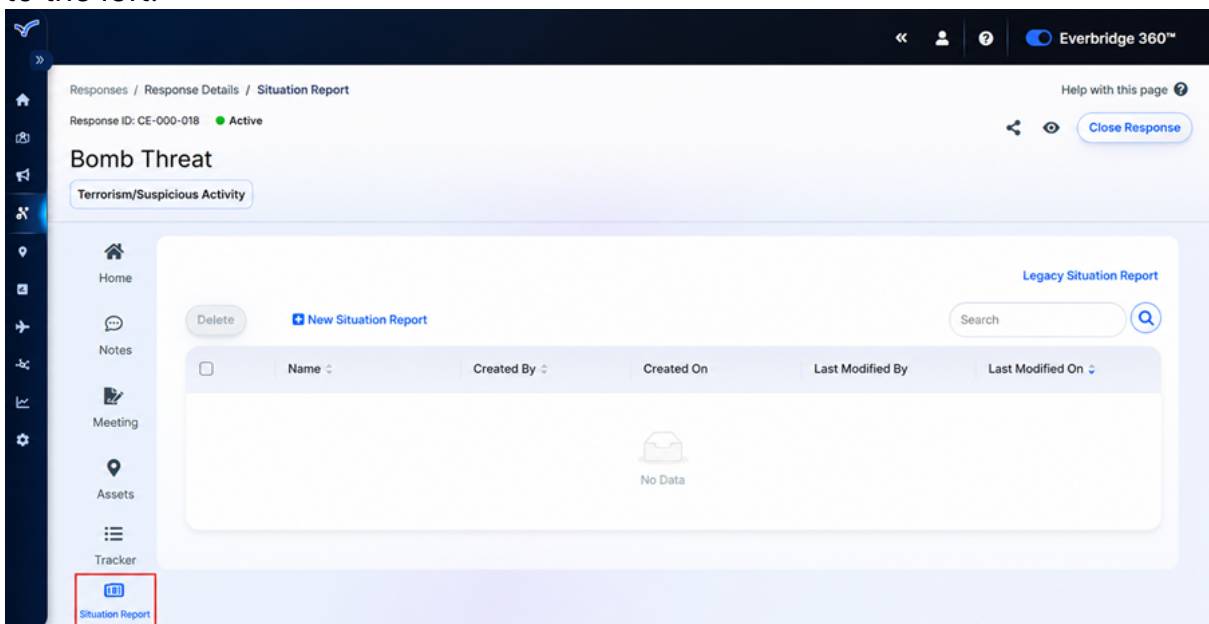
# Managing the Situation Report

Users can customize the **Situation Report** to include or exclude certain elements from the report. For example, users who do not want the Task List can exclude it from the Situation Report.

## Creating a New Situation Report

To create a new Situation Report:

1. From the **Response Details** page of a Response, click the **Situation Report** tab to the left.



2. Click **New Situation Report**.
3. Type a name for the report and click **Create**.
4. Click **+** located on the right side of the page.
5. The **Manage Situation Report** dialog appears. Select the checkboxes of the Response and Task Widgets to include in the report. You can also create or

add Custom Widgets from the **Widgets Library**.



6. Click **Save**.

7. Click **Situation Report** to return to the **Response Details** page.

Based on what you select in the **Manage Situation Report** function, the report reflects those choices.

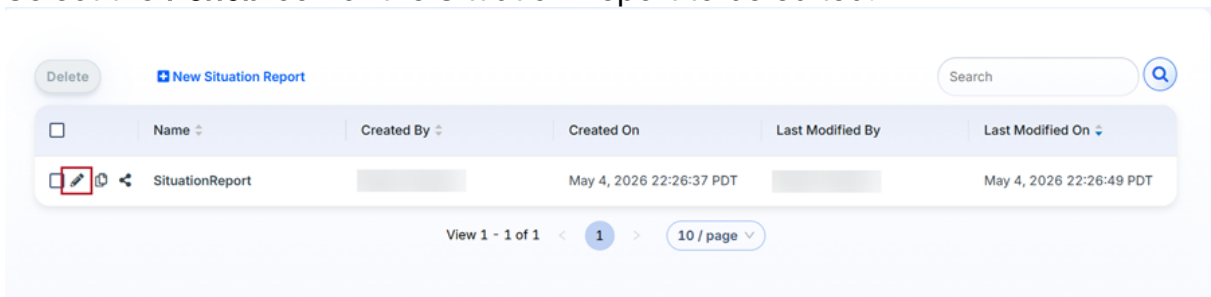
Anyone on the Response Management team can optionally add an Executive Summary. Be sure to click **Save**. Then, click **Preview** to see the Situation Report in a Document format, which can be exported to PDF.

To export the report to PDF, click **Print**, provide a unique filename, then click **Save**.

## Editing a Situation Report

To edit a Situation Report:

1. From the **Response Details** page, click the **Situation Report** tab.
2. Select the **Pencil** icon of the Situation Report to be edited.



3. Make your changes by clicking the Widget Control (the three dots in the upper right-hand corner of each Widget). You can:
  - Edit the Widget title, then click **Save**.
  - Remove the Widget.
4. Optionally, click the blue + sign to select the Widgets for this Situation Report, then click **Save**.

5. Optionally, reorder the placement of the Widgets by holding down the mouse on the Widget title and dragging it to the desired position.
6. Optionally, toggle on the Page Break. Then, scroll to the bottom of the Situation Report and click the Page Break icon in the lower right-hand corner.
7. Optionally, click the **PDF** icon to export the Situation Report to PDF.

## Sharing a Situation Report

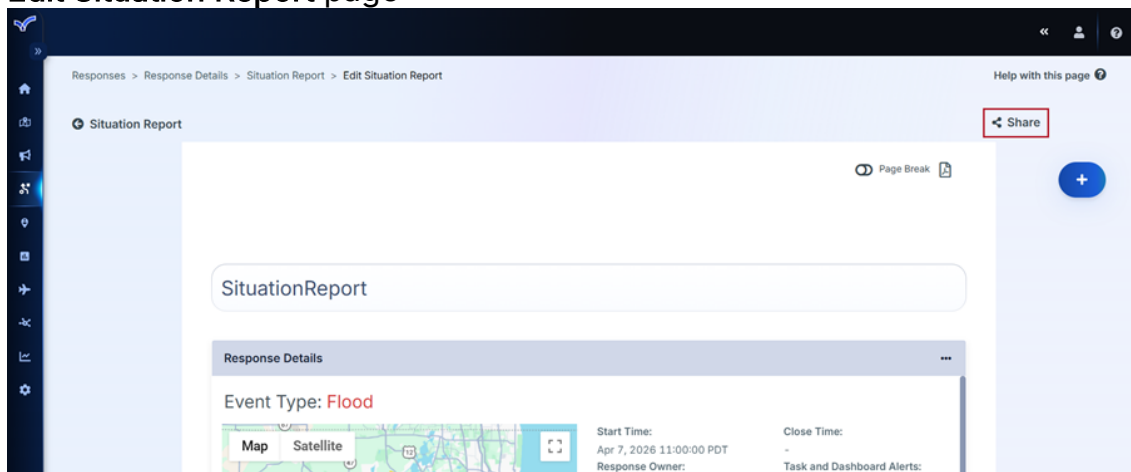
Situation Reports can be emailed directly to contacts during various stages of a Response to keep stakeholders apprised of the latest status and response efforts.

To share a Situation Report:

1. Situation Reports can be shared from two places:
  - **Situation Reports** list on the **Response Details** page



- **Edit Situation Report** page



2. Click the **Share** icon.

3. The contact modal appears. Select the recipients via Individuals, Groups, and/or Rules.

Email Situation Report to Contacts

\* Select Contacts:

10 Individuals      1 Groups      1 Rules

Preview Contacts      Clear selected contacts

Selected Contacts will receive a link to the Situation Report through Email delivery path configured for them

\* Subject

Situation Report (SituationReport) has been shared with you

\* Include a message

Dear User,

Please find the below link to Situation Report (SituationReport) for the Response (Flood Warning)

0 / 2000

Cancel      Send

4. If desired, customize the **Subject** and **Include a Message** fields, or leave the default text.
5. Click **Send**. The selected recipients will receive the emailed link to the Situation Report.

## Copying a Situation Report

To copy a Situation Report:

1. From the **Response Details** page, click the **Situation Report** tab.
2. Select the **Copy** icon of the Situation Report to be copied. The **Copy Situation Report** dialog appears.

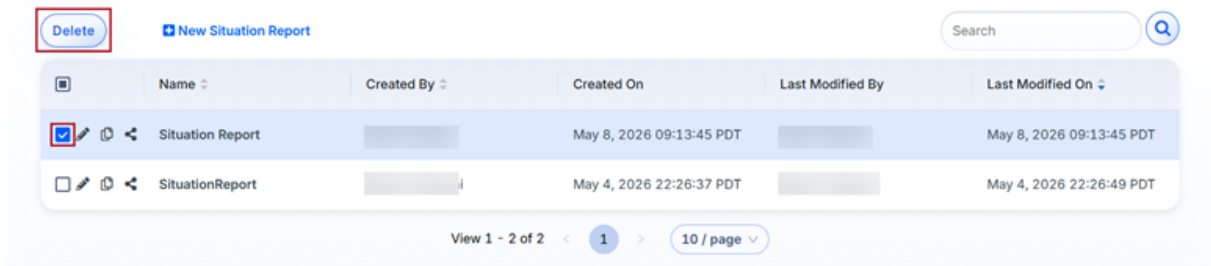


3. Change the name of the Situation Report and click **OK**.
4. Edit as needed.

## Deleting a Situation Report

To delete a Situation Report:

1. From the **Response Details** page, click the **Situation Report** tab.
2. Select the checkbox of the Situation Report to be deleted.
3. Click **Delete**. The **Delete Situation Report** dialog appears.



4. Click **Delete Situation Report** to permanently remove the Situation Report from this Response.