



# Everbridge Suite User Guide

Everbridge Suite

September 24, 2014



Everbridge Suite User Guide  
Everbridge Suite  
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## About This Guide

The following topics are covered:

- ♦ *Introduction*
- ♦ *Using Everbridge Suite Documentation*



# Introduction

The *Everbridge Suite User Guide* is your reference source for using the production system. It provides information about the Everbridge Suite product to enable you to quickly set up configuration options and then use the system.

The following sections provide information on how to use this guide, and outline any related Everbridge Suite publications.

## Intended Audience

This guide is intended primarily for administrators and operators of the Everbridge Suite system.

# Using Everbridge Suite Documentation

This section:

- ◇ Outlines the structure and contents of this guide
- ◇ Provides a list of conventions used in the Everbridge Suite documentation set
- ◇ Identifies other related documentation

## Contents of This Guide

This guide contains the following chapters and appendixes.

Chapter or Appendix	Description
<i>Chapter 1, Introduction</i>	Introduces you to Everbridge Suite and the people (roles) who use it.
<i>Chapter 2, Dashboard</i>	Provides information about the Dashboard. The Dashboard displays customizable panels of information about your Everbridge Suite system.
<i>Chapter 3, Universe</i>	Provides information about the Universe tab. The Universe tab allows you to select contacts for a notification in a geographic area. You can also add a New Notification from this tab.
<i>Chapter 4, Notifications</i>	Provides information about Notifications. The Notifications tab begins with displaying the status of notifications in the Active/History sub-tab. Other sub-tabs include: Schedules, Notification Templates, and Message Templates. You can also add a New Notification from this tab.
<i>Chapter 5, Contacts</i>	Provides information about contact management. This is the tab where you can add and maintain contacts. Administrators can upload Contacts, add Groups and Rules.
<i>Chapter 5, Scheduling</i>	Provides information about Scheduling. You can manage calendars, shifts, and staff from Contacts > Scheduling.
<i>Chapter 6, Reports</i>	Provides information about the Reports you can view and/or add.
<i>Chapter 7, User and Role Management</i>	Provides information about User-Role management using the Access tab.
<i>Chapter 8, Mobile Manager</i>	Provides information about using Everbridge Mobile Manager from your mobile device.
<i>Chapter 9, Mobile Site</i>	Provides information about the Everbridge Mobile Site, which allows users to initiate notifications from any mobile device that has a web browser.
<i>Appendix A, Organization Settings</i>	Describes the configuration options available to you in the Everbridge Suite system. The Organization tab is provided for Administrators to configure settings specific to your organization.
<i>Appendix B, Member Portal</i>	Describes the configuration options available to you for your Everbridge Suite Member Portal. The Member Portal tab is provided for Administrators to configure settings specific to your organization.
<i>Appendix C, Password and Session Expirations</i>	Provides a quick reference of the Everbridge Suite password and session expirations.



Chapter or Appendix	Description
<i>Appendix D, Upload and Download Guidelines for Non-English Languages</i>	Provides information for implementations using non-English languages when uploading and downloading contacts.
<i>Glossary</i>	Provides definitions for common terms and acronyms.

## Conventions

The following table describes the typographical conventions used in this guide.

Convention	Meaning
Monospace	Indicates text that should be entered <i>exactly as shown</i> (including punctuation) or examples of code. Here is an example of a command line: # dirk /irksome
<b>Bold</b>	Indicates text that must be typed by the user. For example, From the Title field, type <b>XXX</b> and press TAB to advance to the next field.
<i>Italic</i>	Indicates one of the following: <ul style="list-style-type: none"><li>♦ A cross-reference. For example, “For more information, see <i>Related Documentation</i> on page xii”.</li><li>♦ A glossary term being defined for the first time.</li></ul>
ENTER, SHIFT, CTRL, TAB, and so forth	Workstation keyboard keys to be pressed are shown in uppercase type.
Press TAB.	To advance to the next field, instructions are to “press TAB.” Alternatively, you can Tap the primary mouse button in the next field.
>	In step-by-step procedures, the > symbol separates different commands to select. For example, select Incidents > Incident Templates > New Incident Template.
Interchangeable Terms	The following terms are used interchangeably: <ul style="list-style-type: none"><li>♦ Mass Notification and MN</li><li>♦ Interactive Visibility and IV</li></ul>
<b>NOTE</b>	A note emphasizes information that is of particular significance for the topic under discussion.

## Related Documentation

Documentation is provided to help you implement and run the Mass Notification of products. In addition to this publication, the Everbridge Suite documentation set consists of the following guides. You can view and/or download the PDF-formatted guides from Everbridge University. Print the PDFs in duplex (2-sided) mode to save resources.

Guide	Description	Intended Audience
Everbridge Suite Implementation Services Guide	Provides an outline of the tasks stakeholders and account administrators should perform to prepare their organization ready for sending notifications.	Stakeholders and Account Administrators



Guide	Description	Intended Audience
Everbridge Suite Incident Management User Guide	Provides the information that helps you automate your communication center operations and communication plans.	Account Administrators, Incident Administrators, and Incident Operators (users who will manage incidents and/or manage the communication plan for the organization)
Everbridge Suite Interactive Visibility User Guide	Enables administrators to set up configuration options so that operators can use the Interactive Visibility capabilities.	Administrators and operators, as well as opt-in members of their Member Portal
Everbridge Suite REST Application Programming Interface Guide	Lists the Data Types that are in the REST API (Representational State Transfer Application Programming Interface).	Developers and application programmers
Everbridge Suite SMART Weather Alerting User Guide	Provides information about the SMART Weather Alerting feature to enable you to set up configuration options and then use the system.	Administrators and operators



# Introduction

This chapter introduces you to Everbridge Suite and people who will use it. Additionally, it includes a step-by-step procedure on how to login to the Everbridge Suite system.

**The following topics are covered:**

- ♦ *Overview*
- ♦ *Roles*
- ♦ *Managing Users from the Users Tab*
- ♦ *Help & Support*

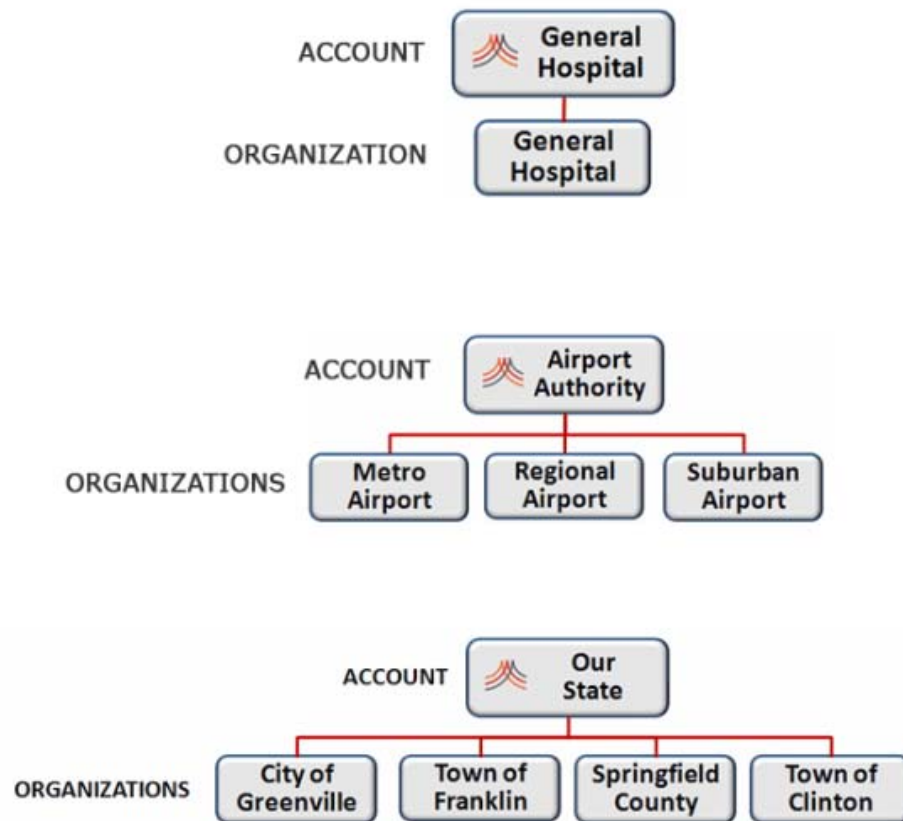


# Overview

The Everbridge Suite system enables users to send notifications to individuals or groups using lists, locations, and maps. Following your communication plan for your organization, everyone could be informed before, during, and after events, whether the events are emergency or non-emergency. Your Everbridge Suite home page shows only what your organization has implemented.

In the Everbridge Suite system, the Everbridge *account* is the top level of all implementations. Each Everbridge account has at least one *organization* configured in it. An account can have many organizations. An organization can have multiple groups. Each organization has its own contacts and operates independently. A *contact* is someone who receives a notification.

There are no contacts at the Account level. The Account level is used for user management



**NOTE:** If you need to add additional organizations to your account, contact your Everbridge Account Manager.



## Delivery Methods

The message is delivered in various delivery formats.

- ◊ If the message is delivered to a voice device like a phone or mobile phone, it is played as a voice message.
- ◊ If the message is delivered to a text device, like email, it arrives as a text message.
- ◊ If the message is going to email, it can have data attached as a file.

Everbridge supports the following delivery devices: direct dial phone, extension phone, email address, fax, mobile phone, numeric pager, TAP (Telocator Alphanumeric input Protocol) pager, SMS (Short Message Service) text message, TTY, and Mobile Member App.

A delivery method is how the message gets to the device. It can be via: voice call, email, SMS message, Mobile Member application, or TTY call. Your organization decides which delivery methods to make available for notifying contacts.

A contact does not need to have a contact path for every delivery method enabled for the organization, just the ones they are going to use.

It is important to remember that you are trying to notify a person, not dial a phone number, so you want to have multiple ways of reaching that person.

## Contacts

For each contact, the contact paths are set in priority order. This is the order that the system will use to deliver messages. It will try to deliver the message by the contact path which is first in the priority list. If it is not acknowledged by the contact, the system tries the next priority contact path until it reaches the end.

Many organizations use between five and ten contact paths per person. The following are some examples:

- ◊ Everbridge Mobile Member app
- ◊ SMS
- ◊ Personal email
- ◊ Business email
- ◊ Office phone
- ◊ Mobile phone

It is recommended to put the text delivery paths higher in order than the voice delivery paths. Reviewing a text message can be more accurate for the contact than trying to listen to a voice mail message. If there is a widespread emergency, text messages might be able to be delivered before voice messages.

When a message is being sent to a contact, and the system has tried all of the contact paths for that person one time, it is called a *cycle*. When you send a message, you can configure the number of cycles to try to reach a contact.



## Sending a Notification

There are a few ways to send a notification. One way is from the Notifications tab. Click New Notification. The New Notification page appears. If you are going to send a notification to contacts from the map, you do so from the Universe tab. From the Universe tab, click New Notification. A New Notification panel appears, identical to the one from the Notifications tab. You have all the fields you need on one page to send a notification.



# Roles

The Everbridge Suite system offers two levels of user roles: the Account level and the Organization level.

## Account Level

At the Account level, an *Account Administrator* is the contract administrator. The Account Administrator inherits all permissions of all user roles for all products assigned to the client. Account Administrators can access all functionality available at the Account level and at the Organization level.

Tab	Action
Notifications	Send notifications to contacts in any organization.
Contacts	Upload contacts into any organization.
Users	Add, edit, delete and enable/disable users in any organization.
Roles	Assign resources and users to the users added/managed under the Users tab.
Settings	<ul style="list-style-type: none"><li>◆ Notifications—Specify settings that are applied to all notifications in all organizations.</li><li>◆ Contacts—Specify settings that are applied to all contacts and groups in all organizations.</li></ul>

## Organization Level

At the Organization level, there are many roles. You have access to components of the system depending on your role. That is, the Everbridge Suite tabs available to you after you login are the ones in which you have permission to work. Default roles are:

- ◆ *Organization Administrator*—This administrator is responsible for an Everbridge Suite organization. Organization Administrators can access all functionality available to the organization (all Everbridge Suite tabs at the Organization level). Organization Administrators can perform actions within their own organizations, but not other organizations. They can add groups in their individual organizations.
- ◆ *Group Manager*—This administrator can manage and send notifications to predefined sets of contacts. Group Managers can access functionality at the Organization level to the following Everbridge Suite tabs: Dashboard, Universe, Notifications, Contacts, and Reports. Group Managers can perform actions within their own groups. A Group Manager cannot edit the organization settings.
- ◆ *Dispatcher*—Users of this role can manage and send notification templates, manage scheduled notifications, and manage active notifications. Dispatchers can access functionality at the Organization level to the following Everbridge Suite tabs: Dashboard, Universe, and Notifications.



- ◇ *Data Manager*—Users of this role can only manage contact records (add, edit, and remove). Data Managers can access functionality at the Organization level to the following Everbridge Suite tabs: Contacts and Reports.
- ◇ *Mass Notification Operator*—Users of this role can send predefined notification templates and can manage active notifications. Mass Notification Operators can access functionality at the Organization level to the following Everbridge Suite tabs: Notifications.

In general, users of the Everbridge Suite system can perform the following actions, but only if they have permission.

Tab	Action
Dashboard	View notification and incident dashboards.
Universe	<ul style="list-style-type: none"><li>◇ Use selection tools to highlight contacts on the map.</li><li>◇ Send a notification from the Universe to contacts selected on the map.</li><li>◇ Access weather alerts.</li><li>◇ Access Twitter alerts.</li><li>◇ Access NC4 alerts.</li><li>◇ Access Mobile Member messages.</li></ul>
Notifications	<ul style="list-style-type: none"><li>◇ Add a new notification - send now, schedule, save as template.</li><li>◇ Send an existing notification template.</li><li>◇ Edit an existing notification template.</li><li>◇ Add, edit, and delete message templates.</li><li>◇ Manage scheduled and recurring notifications.</li><li>◇ Manage active/sent notifications (including stop, rebroadcast, follow-up).</li><li>◇ Publish to CMAS/WEA.</li><li>◇ Publish to the Everbridge Network.</li><li>◇ Publish to Alertus (an Everbridge Partner).</li><li>◇ Publish to Web Posting.</li></ul>
Contacts	<ul style="list-style-type: none"><li>◇ Add and delete contacts, add contacts to groups.</li><li>◇ Edit and download existing contacts, save (search) filters as rules.</li><li>◇ Upload contacts.</li><li>◇ Add, edit, and delete groups; remove contacts from a group.</li><li>◇ Add, edit, and delete rules, and contact layers.</li></ul>
Scheduling	<p>The Scheduling sub-tab is displayed only if Organization Administrators have been given permission.</p> <ul style="list-style-type: none"><li>◇ Add, edit, and delete calendars.</li><li>◇ Add, edit, and delete shifts.</li><li>◇ Add, edit, and delete staff.</li></ul>
Reports	<ul style="list-style-type: none"><li>◇ View Quick Reports.</li><li>◇ Add, edit, and delete Notification Custom Reports.</li><li>◇ Add, edit, and delete Contact Custom Reports.</li></ul>





Tab	Action
Settings	<ul style="list-style-type: none"><li>Organization—Edit base information and login message.</li><li>Map—Edit default map views, manage shape library and import region files.</li><li>Interactive Visibility—Turn weather/Twitter/mobile alerts on/off, and add new alerts.</li><li>Notifications—Edit the default settings (sender info, delivery methods, and so forth) applied to all notifications across the organization.</li><li>Contact and Groups—Add record types, additional information questions and subscription fields.</li><li>Member Portal—Edit the setup, design, and contents of the organization's Member Portal.</li></ul>
Access	<ul style="list-style-type: none"><li>Manage users and roles—The Access tab is displayed only if Organization Administrators have been given permission to manage users and roles.</li></ul>

Application	Action
Mobile Manager App	<ul style="list-style-type: none"><li>Send a notification.</li><li>Send a notification using a template.</li><li>Rebroadcast a notification.</li><li>Send a notification Follow-up.</li><li>Stop an Active notification.</li></ul>

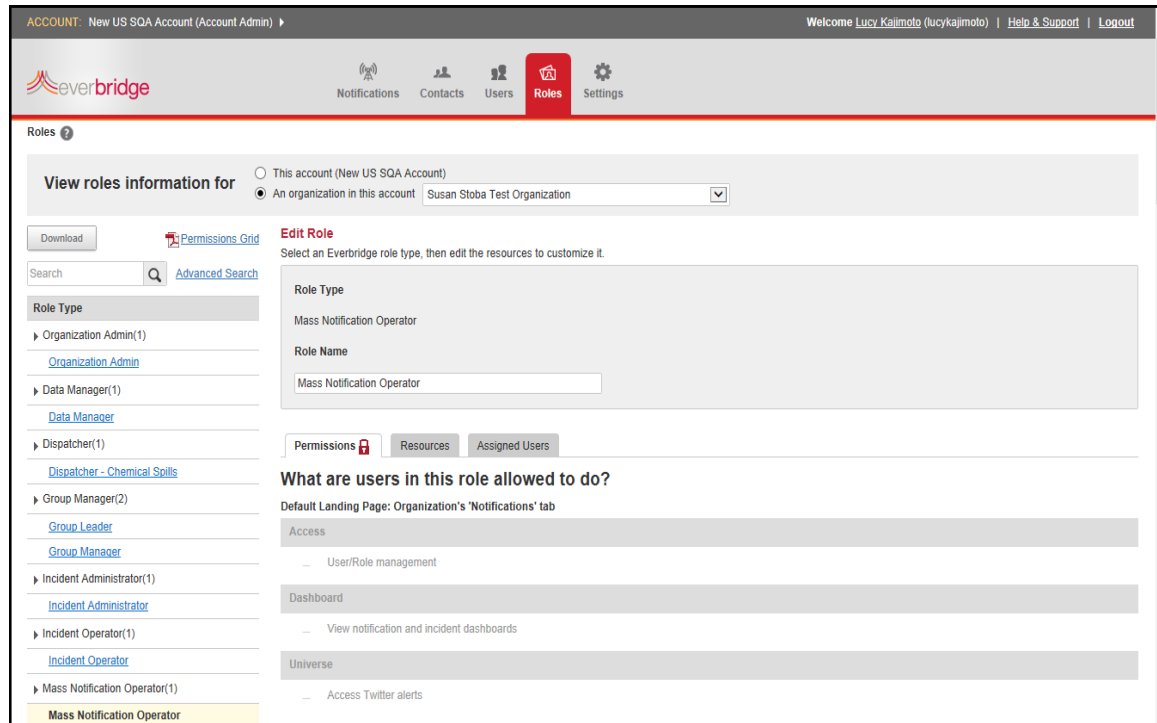
Your Account Administrator can tell you the permissions of your role. See also *Reviewing Role Types and Permissions* on page 235.

### To see the permissions of a role

- 1 Login to the system as an Account Administrator.
- 2 Click the Roles tab.  
The Roles page is displayed. The default view is the Account roles.
- 3 Select the radio button corresponding to the roles you want to view:
  - This account. (If selected, skip to step 5.)
  - An organization in this account. (If selected, go to step 4.)
- 4 Select the desired organization from the drop-down list: View roles information for.  
The Role Types for the selected organization are listed on the left-hand side of the page.



## 5 Select the desired Role Type.



Depending on the role, the right-hand panel might show the following sub-tabs:

- **Permissions**—Displays the permissions of this particular role.

**NOTE:** To see the Permissions Grid of all roles, see *Permissions Grid* on page 236.

- **Resources**—Displays the groups and templates to which the users of this particular role have access restrictions. If you want to customize the role, add a new role type and update the access to resources (groups and templates). See the procedure *To add a role* on page 11.
- **Assigned Users**—Lists the users assigned to this particular role.

## 6 Select the Permissions tab.

## 7 Scroll down the list to see what the users in this role are allowed to do.



Check marks indicate the activities the users are allowed to do; otherwise, the activities are grayed out. See the following example of the permissions of a Mass Notification Operator role. (See also *Reviewing Role Types and Permissions* on page 235.)

ACCOUNT: New US SQA Account (Account Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

everbridge

Notifications Contacts Users Roles Settings

Roles ?

View roles information for

☐ This account (New US SQA Account)

☒ An organization in this account Susan Stoba Test Organization

Download Permissions Grid

Search >Advanced Search

Role Type

- Organization Admin(1)  
[Organization Admin](#)
- Data Manager(1)  
[Data Manager](#)
- Dispatcher(1)  
[Dispatcher - Chemical Spills](#)
- Group Manager(2)  
[Group Manager](#)  
[Group Leader](#)
- Incident Administrator(1)  
[Incident Administrator](#)
- Incident Operator(1)  
[Incident Operator](#)
- Mass Notification Operator(1)  
**Mass Notification Operator**

Add Role

Edit Role

Select an Everbridge role type, then edit the resources to customize it.

Role Type

Mass Notification Operator

Role Name

Mass Notification Operator

Permissions Resources Assigned Users

What are users in this role allowed to do?

Default Landing Page: Organization's 'Notifications' tab

Access

- User/Role management

Dashboard

- View notification and incident dashboards

Universe

- Access Twitter alerts
- Access weather alerts
- Access NC4 alerts (General)
- Access NC4 alerts (Premium)
- Send a notification from the Universe to contacts selected on the map
- Notification button widget
- Use selection tools to highlight contacts on the map
- Access Mobile Member messages

Notification

- Publish to Alertus
- Publish to Web Posting
- Publish to the Everbridge Network
- Publish to CMAS/WEA
- Create a new notification - send now, schedule, save as template, Send follow-up
- ✓ Manage active/sent notifications (including stop, rebroadcast)
- Manage scheduled and recurring notifications
- Edit/Delete an existing notification template
- ✓ Send an existing notification template
- Edit Notification settings: Message content & Contacts
- ✓ Mobile Website
- Create, edit and delete message templates

Incident

- Launch and manage incidents
- Create, edit and delete incident templates



## Chapter 1 – Introduction

- Create, edit and delete information variables

## Contact

### Schedule Management

- Create, edit and delete schedules

### Contact Management

- View Name and External ID ONLY
- View and download ALL contact information
- View, download and edit ALL contact information
- Upload contacts
- Create contacts
- Delete contacts

### Group Management

- Create, edit and delete Groups
- Add contacts to Groups
- Move and Remove contacts from Groups

### Rule Management

- Create, edit and delete rules

## Report

- View Quick Reports
- Create, edit and delete Incident Custom Reports
- Create, edit and delete Incident Notification Custom Reports
- Create, edit and delete Notification Custom Reports
- Create, edit and delete Contact Custom Reports

## Organization Settings

- Organization - Edit base information and login message
- Secure Messaging
- GIS - Edit default map views, manage shape library and import region files
- Interactive Visibility - Turn weather/Twitter/mobile alerts/NC4 alerts on/off, and create new alerts
- Broadcast - Edit the default settings (sender info, delivery methods, etc.) applied to all notifications across the organization
- Contact and Groups - Create record types, additional information questions and subscription fields
- Member Portal - Edit the setup, design and contents of the organization's Member Portal
- Custom Map
- Point-Address Geo-Coding

## Mobile Manager

- Send a notification
- ✓ Send a notification using a template
- ✓ Rebroadcast a notification
- Send a notification Follow-up
- ✓ Stop an Active notification

- 8 Logout when you are done.



## To add a role

- 1 Login to the system as an Account Administrator.
- 2 Click the Roles tab.  
The Roles page is displayed. The default view is the Account roles.
- 3 Select the desired radio button: View roles information for:
  - This account *name*.
  - An organization in this account.
    - Select the organization from the drop-down list. The Role Types that have been added for the selected organization are listed on the left-hand side of the page. A new organization contains only the Organization Administrator role, as shown below.

The screenshot displays the Everbridge Roles management interface. At the top, the breadcrumb shows 'ACCOUNT: New US SQA Account (Account Admin)'. The user is logged in as 'Lucy Kajimoto'. The 'Roles' tab is selected in the navigation bar. Below the navigation bar, the 'View roles information for' section has two radio buttons: 'This account (New US SQA Account)' and 'An organization in this account'. The 'An organization in this account' option is selected, and a dropdown menu shows 'Documentation'. On the left, under 'Role Type', 'Organization Admin' is selected. The main panel shows 'What are users in this role allowed to do?' with a default landing page of 'Organization's 'Dashboard' tab'. The 'Permissions' tab is active, showing a list of permissions with checkboxes: 'User/Role management' (checked), 'View notification and incident dashboards' (checked), 'Access Twitter alerts' (checked), 'Access weather alerts' (checked), 'Use selection tools to highlight contacts on the map' (checked), 'Access Mobile Member messages' (checked), 'Send a notification from the Universe to contacts selected on the map' (checked), 'Notification button widget' (checked), and 'Publish to Alertus' (checked).

- The right-hand panel displays the role profile: default Permissions (that are fixed for each role), and Assigned Users (the names of the users assigned to the role, if any).
- For Organization Administrators only, optionally, from the Permissions tab under Access, select the check box for User and Role management. This allows your Organization Administrator to be assigned other roles within the organization. For details about User and Role management, see *Chapter 7, User and Role Management*.



- 4 At the bottom of the Role Type list, select Add Role.

ACCOUNT: New US SQA Account (Account Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Notifications Contacts Users Roles Settings

Roles

View roles information for

☐ This account (New US SQA Account)

☒ An organization in this account Documentation

Download Permissions Grid

Search Advanced Search

Role Type

- Organization Admin(1)
- Organization Admin
- Dispatcher(1)
- Dispatcher
- Group Manager(1)
- Group Manager
- Mass Notification Operator(1)
- Mass Notification Operator

Add Role

Add Role

Select an Everbridge role type, then edit the resources to customize it.

Role Type

- Select -

Role Name

Save

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- 5 From the Add Role panel, in the Role Type field, select a role type from the drop-down list of Everbridge default roles. You will use the selected role type as the basis for your new role.
- 6 In the Role Name field, type a name for your new role.

**NOTE:** The role name cannot include a pipe character (|). The pipe character is used solely as a separator.



The role type becomes a “folder” that contains all the custom roles you add. The Role Name can be the same as the role type.

ACCOUNT: New US SQA Account (Account Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Notifications Contacts Users Roles Settings

Roles

View roles information for

☐ This account (New US SQA Account)

☒ An organization in this account Documentation

Download Permissions Grid

Search Advanced Search

Role Type

Organization Admin(1)

Organization Admin

Dispatcher(1)

Dispatcher

Group Manager(1)

Group Manager

Mass Notification Operator(1)

Mass Notification Operator

+ Add Role

Add Role

Select an Everbridge role type, then edit the resources to customize it.

Role Type

Mass Notification Operator

Role Name

MN Operator

Permissions Resources

What are users in this role allowed to use/access?

Notification Template

☒ Access to all

☐ Limited access

Save

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Depending on the role, there could be two tabs at the bottom of the Add Role panel: default Permissions (that are fixed for each role), and Resources (notification or incident templates).

- Click the Permissions sub-tab to view the permissions for this role.

**NOTE:** You cannot edit the permissions. However, for the Group Manager role, you can edit the contact permissions. See *To edit the Contact permissions for a Group Manager role* on page 17.

- Click the Resources sub-tab.

You can limit the templates to which the users in this role have access. By default, all users in this role have Access to All templates.

- Select the Limited Access radio button to limit access to one or more specific templates used by the role.
  - A list of templates for your organization is displayed. (Open the tree by clicking the Plus sign (+) next to the template name, as needed.)
  - If you have not yet added any templates, the list will be empty.
  - Select the check boxes for the templates you want your new role to be able to access.

**NOTE:** If you selected Group Manager or Dispatcher as your template, see also the procedure *To manage dynamic groups* on page 19.

- Click Save.



Your new role is listed in the left-hand panel of Role Types.

ACCOUNT: New US SQA Account (Account Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Notifications Contacts Users Roles Settings

Roles ?

View roles information for ☐ This account (New US SQA Account) ☒ An organization in this account Documentation

Download Permissions Grid

Search Advanced Search

Role Type

- Organization Admin(1)  
[Organization Admin](#)
- Dispatcher(1)  
[Dispatcher](#)
- Group Manager(1)  
[Group Manager](#)
- Mass Notification Operator(2)  
**MN Operator**  
[Mass Notification Operator](#)

+ Add Role

**Edit Role**  
Select an Everbridge role type, then edit the resources to customize it.

Role Type  
Mass Notification Operator

Role Name  
MN Operator

Permissions Resources Assigned Users

**What are users in this role allowed to use/access?**

Notification Template

- ☒ Access to all
- ☐ Limited access

Save

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- 11 Repeat steps 3 through 10 to add more roles.

### To change the name and/or resources of a role

- 1 Login to the system as an Account Administrator.
- 2 Click the Roles tab.  
The Roles page is displayed. The default view is the Account roles.
- 3 Select the desired radio button to View roles for information for:
  - This account *name*.
  - An organization in this account.





- Select the organization from the drop-down list. The Role Types that have been added for the selected organization are listed on the left-hand side of the page.

ACCOUNT: New US SQA Account (Account Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

everbridge

Notifications Contacts Users Roles Settings

Roles

View roles information for

☐ This account (New US SQA Account)

☒ An organization in this account

Documentation

Download Permissions Grid Permissions Assigned Users

Search Advanced Search

Role Type

- Organization Admin(1)
- Organization Admin
- Dispatcher(1)
- Dispatcher
- Group Manager(1)
- Group Manager
- Mass Notification Operator(2)
- MIN Operator
- Mass Notification Operator

Add Role

What are users in this role allowed to do?

Default Landing Page: Organization's "Dashboard" tab

Access

- ☐ User/Role management

Dashboard

- ☒ View notification and incident dashboards

Universe

- ☒ Access Twitter alerts
- ☒ Access weather alerts
- ☒ Use selection tools to highlight contacts on the map
- ☒ Access Mobile Member messages
- ☒ Send a notification from the Universe to contacts selected on the map
- ☒ Notification button widget

Notification

- ☒ Publish to Alertus

The right-hand panel displays the role profile: default Permissions (that are fixed for each role), and Assigned Users (the names of the users assigned to the role, if any).

- 4 From the Role Type panel on the left-hand side of the page, select the role you want to modify.

You might want to change the name of the role or change the access to templates for the selected role.

- To change the name of the role, from the Role panel, in the Role Name field, rename your role.

**NOTE:** The role name cannot include a pipe character (|). The pipe character is used solely as a separator.

- To change the access to templates for the selected role, at the bottom of the Add Role panel, select the Limited Access radio button.  
A list of templates for your organization is displayed. (Open the tree by clicking the Plus sign (+) next to the template name, if needed.)



- 5 Select the check boxes for the templates you want this role to be able to access.

**View roles information for** ☐ This account (New US SQA Account) ☒ An organization in this account Documentation

[Download](#) [Permissions Grid](#)

Search  [Advanced Search](#)

**Role Type**

- Organization Admin(1)  
[Organization Admin](#)
- Dispatcher(1)  
[Dispatcher](#)
- Group Manager(1)  
**Group Manager**
- Mass Notification Operator(2)  
[Mass Notification Operator](#)
- [MN Operator](#)

[Add Role](#)

**Edit Role**  
Select an Everbridge role type, then edit the resources to customize it.

**Role Type**  
Group Manager

**Role Name**

**Permissions** **Resources** **Assigned Users**

**What are users in this role allowed to use/access?**

**Groups**

☒ Limited access

- ☐ Administrators
- ☐ Employees
- ☒ Hart School District
- ☐ Managers
- ☒ Newhall School District
- ☒ Newhall School District

**Dynamic Group** [Manage](#)

☒ Limited access

- ☒ Dynamic Group Glendale

[Save](#)

- 6 Click Save.

**NOTE:** You can provide Group Managers access to Dynamic Groups, as well as privileges to create and edit static Groups. If contacts accessible through a Dynamic Group are added to any other Group, and those same contacts later fall out of the Dynamic Group, they are not automatically removed from the other Groups. They must be removed manually.

Your edited role is listed in the left-hand panel of Role Types.



**View roles information for** ☐ This account (New US SQA Account) ☒ An organization in this account Documentation

[Download](#) [Permissions Grid](#)

Search [Advanced Search](#)

**Role Type**

- Organization Admin(1)  
[Organization Admin](#)
- Dispatcher(1)  
[Dispatcher](#)
- Group Manager(1)  
**Group Mgr-School Districts**
- Mass Notification Operator(2)  
[Mass Notification Operator](#)  
[MN Operator](#)

[Add Role](#)

**Edit Role**  
Select an Everbridge role type, then edit the resources to customize it.

**Role Type**  
Group Manager

**Role Name**

[Permissions](#) [Resources](#) [Assigned Users](#)

**What are users in this role allowed to use/access?**

**Groups**

☒ Limited access

- ☒ Administrators
- ☒ Employees
- ☒ Hart School District
- ☒ Managers
- ☒ Newhall School District
- ☒ Newhall School District

**Dynamic Group** [Manage](#)

☒ Limited access

- ☒ Dynamic Group Glendale

[Save](#)

- 7 Repeat steps 3 through 6 to edit additional roles.

## To edit the Contact permissions for a Group Manager role

- 1 Login to the system as an Account Administrator.
- 2 Click the Roles tab.  
The Roles page is displayed. The default view is the Account roles.
- 3 Select the radio button: An organization in this account.
- 4 Select the organization from the drop-down list. The Role Types that have been added for the selected organization are listed on the left-hand side of the page.
- 5 Select Group Manager.

**6** Select the Permissions sub-tab.

**View roles information for** ☐ This account (New US SQA Account) ☒ An organization in this account Documentation

[Download](#) [Permissions Grid](#)

Search  [Advanced Search](#)

**Role Type**

- Organization Admin(1)  
[Organization Admin](#)
- Dispatcher(1)  
[Dispatcher](#)
- Group Manager(1)  
[Group Mgr-School Districts](#)
- Mass Notification Operator(2)  
[Mass Notification Operator](#)  
[MN Operator](#)

[Add Role](#)

**Edit Role**  
Select an Everbridge role type, then edit the resources to customize it.

**Role Type**  
Group Manager

**Role Name**

**Permissions** **Resources** **Assigned Users**

**What are users in this role allowed to do?**

Default Landing Page: Organization's "Dashboard" tab  
[Edit contact permissions](#)

**Access**

- UserRole management

**Dashboard**

- ☒ View notification and incident dashboards

**Universe**

- ☒ Access Twitter alerts
- ☒ Access weather alerts
- ☒ Use selection tools to highlight contacts on the map
- ☒ Access Mobile Member messages
- ☒ Send a notification from the Universe to contacts selected on the map

**7** Select: Edit contact permissions.

The permissions for Contacts - Contact Management, Group Management, and Rule Management - are displayed.



- 8 From each Contact category, select each check box that you want your custom Group Manager role to have.

— Create, edit and delete incident templates

— Create, edit and delete information variables

**Contact**

Schedule Management

☐ Create, edit and delete schedules

Contact Management

☒ View Name and External ID ONLY

☐ View and download ALL contact information

☒ View, download and edit ALL contact information

☐ Create contacts

☐ Delete contacts

Group Management

☐ Create, edit and delete Groups

☐ Add contacts to Groups

☒ Move and Remove contacts from Groups

Rule Management

☒ Create, edit and delete rules

**Report**

☒ View Quick Reports

— Create, edit and delete Incident Custom Reports

— Create, edit and delete Incident Notification Custom Reports

☒ Create, edit and delete Notification Custom Reports

- 9 Scroll and select Save.

## Dynamic Groups

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

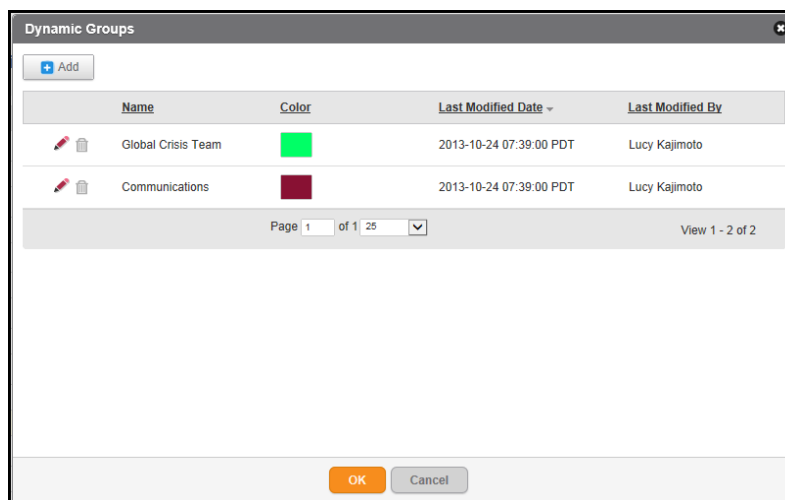
### To manage dynamic groups

- 1 Login to the system as an Account Administrator.
- 2 Click the Roles tab.  
The Roles page is displayed. The default view is the Account roles.
- 3 Select the radio button: An organization in this account.
- 4 Select the desired organization from the drop-down list: View roles information for.  
The Role Types for the selected organization are listed on the left-hand side of the page.
- 5 Select the Role Type: Group Manager and the role you added under this role type (for example, Group Leader).

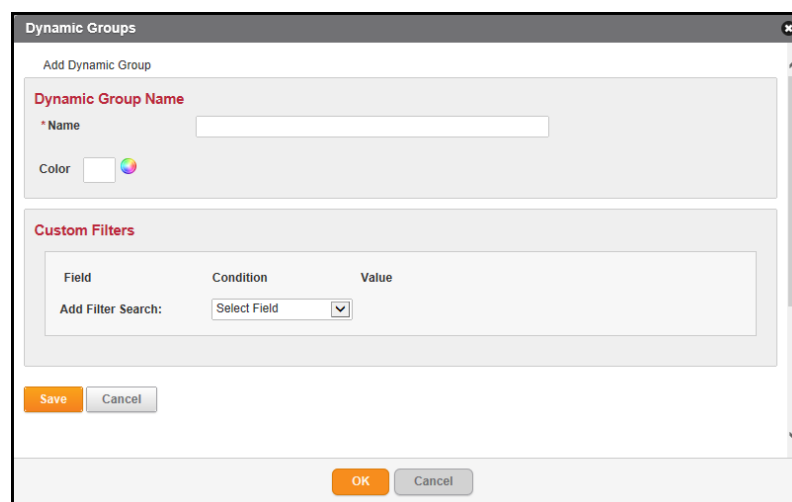


The right-hand side of the page shows sub-tabs:

- **Permissions**—Scroll down the page to see the permissions of this particular role. The permissions are locked because the new role is based on a default role. Permissions for default roles are locked.
  - **Resources**—Displays the groups to which the users of this particular role have access restrictions.
  - **Assigned Users**—Lists the users assigned to this particular role.
- 6 From the Resources sub-tab, under Groups, select the check boxes of the Groups you want your Group Manager (or role under Group Manager) to be able to access.
  - 7 From the Resources sub-tab, under Dynamic Group, click Manage.  
The Dynamic Groups dialog appears.



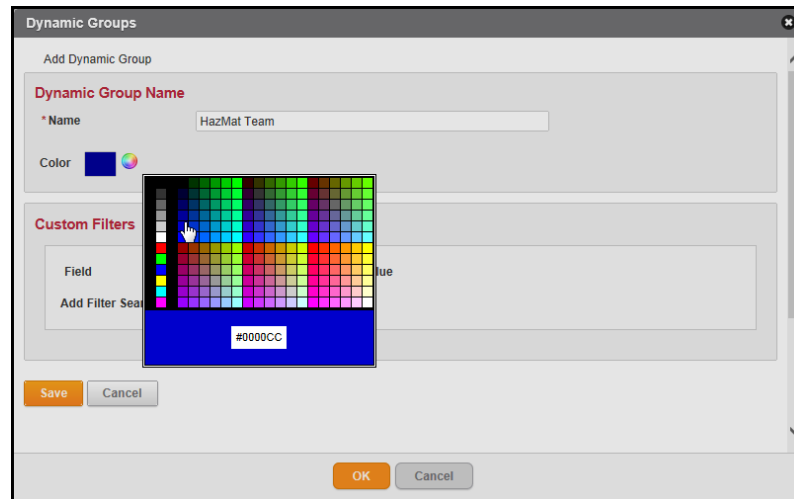
- 8 Click Add (or to edit an existing dynamic group, select the group name from the list and click the Pencil icon).  
The Add Dynamic Group dialog appears.



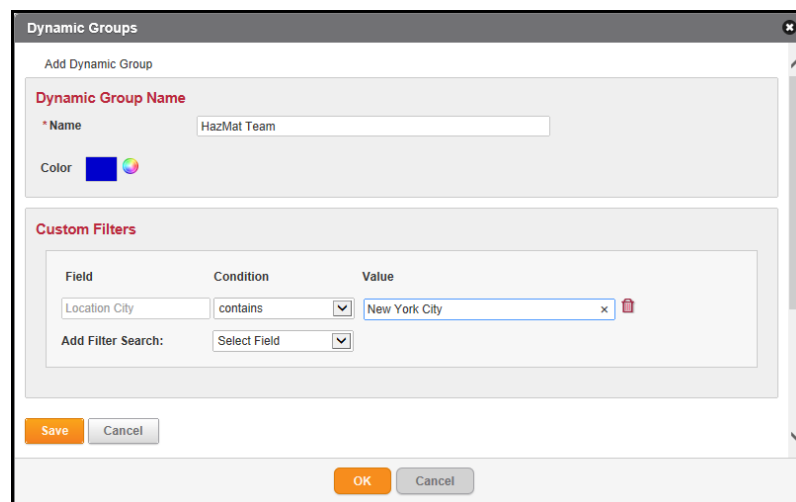
- 9 Type a name for the new dynamic group.



- 10 From the Color field, click the round color icon and select a different color for this dynamic group.  
The color you choose here will be used on the map of the contacts in this dynamic group.



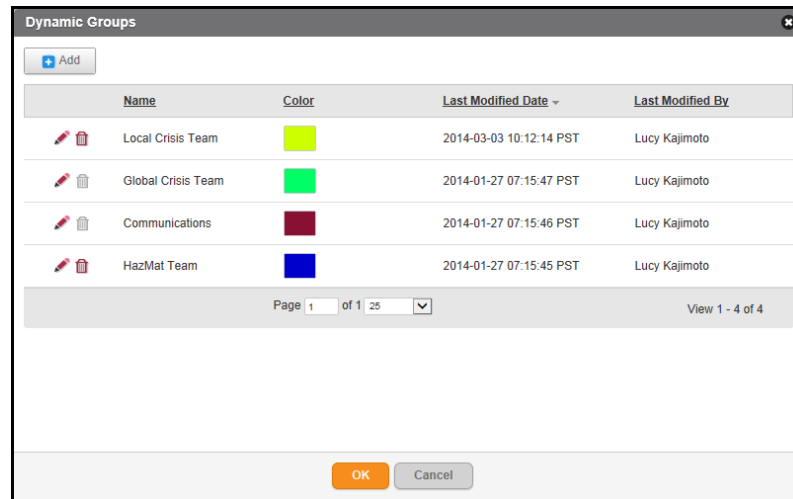
- 11 In Custom Filters, select a Field name from the drop-down list.
- 12 Select a Condition from the drop-down list and type a Value to meet the condition.



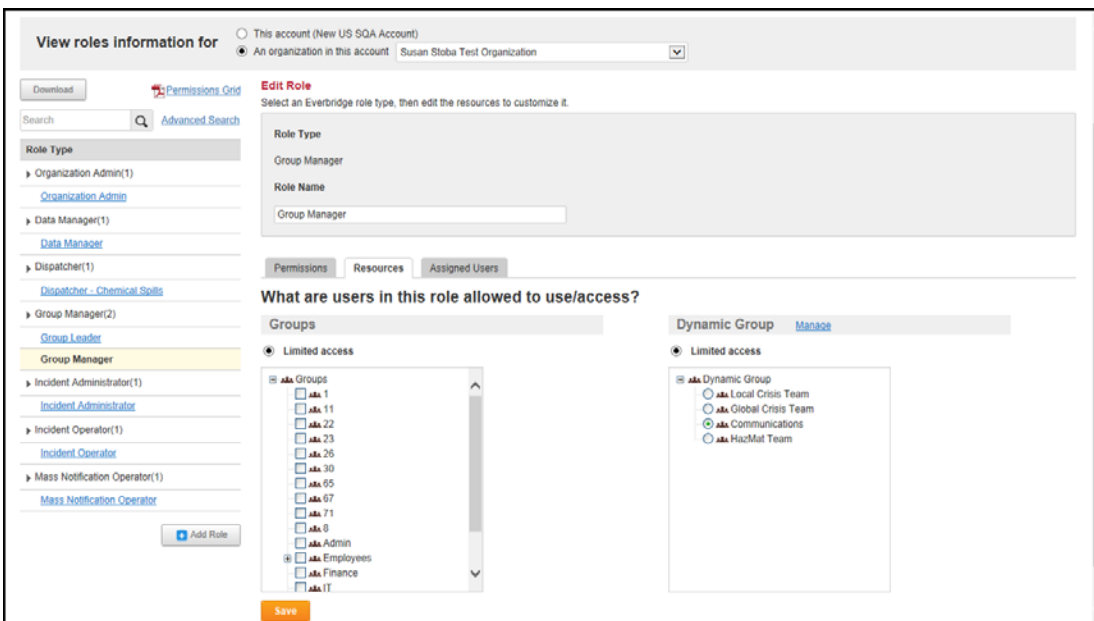
- 13 Repeat steps 11 and 12 to add more filters.



- 14 Select Save.



- 15 Click OK to see the new Dynamic Group in the Limited Access list.



- 16 For this particular role, select the single desired dynamic group name from the list and click Save.  
Preview Results display the contacts who are a part of the group.
- 17 Communicate to your Group Managers that they will see contacts from this dynamic group.





# Managing Users from the Users Tab

From the Account Level, only the Account Administrator can add, edit, or delete users for an account and its organizations.

**NOTE:** At the Organization Level, only if given permission, the Organization Administrator can manage users and roles. See *User and Role Management* on page 221.

## To add a user from the Account Level

- 1 Login as an Account Administrator.
- 2 Select the Users tab.
- 3 Select the Users sub-tab.
- 4 Click Add User.

The Add User page appears.

ACCOUNT: New US SQA Account (Account Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Notifications Contacts **Users** Roles Settings

Users > Add User

**General information**

\*First Name  Owner New US SQA Account

Middle Initial

\*Last Name

Suffix

\*Email Address

SSO User Id

Contact [Link with an existing contact record](#)

**Role information**

Default	Organization	Role Type	Role Name
<input type="text"/>			

Account Level  [Add Role](#)

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- 5 In the General Information pane, type the user name and email address.
- 6 If you have Single Sign-On functionality, type the user's SSO User ID.
- 7 Optionally, click the link: "Link with an existing contact record" to link the user record with a contact record. This link is useful if you want to send messages just to your users, and/or if you plan to allow users to edit their contact information via the private portal.



This contact record must already exist in order to link the record with the user.

The screenshot shows the Everbridge 'Add User' interface. On the left, the 'General Information' section includes fields for First Name, Middle Initial, Last Name, Suffix, Email Address, SSO User Id, and Contact. The 'Role Information' section includes fields for Default, Organization, Account Level, and Account Admin. A modal window titled 'Link with an existing contact record' is open, displaying a table of contacts. The table has columns for First Name, Last Name, and External ID. The contacts listed are: Cindy Kirk (8185772382), Sheila Morgan (8185772219), Brad Curner (8185772321), Scott Colby (8185772220), Lori Williams (8185772205), Craig Barrick (8185772201), and Sharon Bennett (3.22E+18). The modal also includes a search bar, a 'Page 1 of 10' indicator, and 'Link' and 'Cancel' buttons.

First Name	Last Name	External ID
<input type="radio"/> Cindy	Kirk	8185772382
<input type="radio"/> Sheila	Morgan	8185772219
<input type="radio"/> Brad	Curner	8185772321
<input type="radio"/> Scott	Colby	8185772220
<input type="radio"/> Lori	Williams	8185772205
<input type="radio"/> Craig	Barrick	8185772201
<input type="radio"/> Sharon	Bennett	3.22E+18

- a Select the organization in the account where the contact record has been added.
  - b Search for the name of the contact (the user name).
  - c Select the record.
  - d Click Link.  
To break the link between the record and user, in the Contact field, click the Trash Bin.
- 8 In the Role Information pane:
- a Select the organization level for the role from the drop-down list: Account Level or Organization Level. For details, see *Roles* on page 5.
  - b If you selected the Organization Level, select the organization name from the drop-down list.
  - c Select the Role for this user from the drop-down list.
- 9 Click the link: Add Role.



The role has been assigned to the user.

ACCOUNT: New US SQA Account (Account Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

everbridge

Notifications Contacts **Users** Roles Settings

Users > Add User

**General information**

\* First Name: Lemon Owner: New US SQA Account  
Middle Initial:   
\* Last Name: Tu  
Suffix: Select...  
\* Email Address: Lemon.Tu@Everbridge.com  
SSO User Id:   
Contact: [Link with an existing contact record](#)

**Role information**

Default	Organization	Role Type	Role Name
<input type="radio"/>	Documentation	Organization Admin	Organization Admin

Organization Level:  Documentation  Dispatcher  [Add Role](#)

A user can only have one role in an organization

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10 Repeat steps 6 and 7 to add more roles for this user.

ACCOUNT: New US SQA Account (Account Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

everbridge

Notifications Contacts **Users** Roles Settings

Users > Add User

**General information**

\* First Name: Lemon Owner: New US SQA Account  
Middle Initial:   
\* Last Name: Tu  
Suffix: Select...  
\* Email Address: Lemon.Tu@Everbridge.com  
SSO User Id:   
Contact: [Link with an existing contact record](#)

**Role information**

Default	Organization	Role Type	Role Name
<input checked="" type="radio"/>	Documentation	Organization Admin	Organization Admin
<input type="radio"/>	Documentation	Mass Notification Operator	Mass Notification Operator

Organization Level:  Documentation  Dispatcher  [Add Role](#)

A user can only have one role in an organization

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**NOTE:** The user can have multiple roles in an organization and/or across organizations.

11 Click Save.  
The User Management page is displayed. See also *Ownership* on page 226.



## User Management

The new user is now on the list of users. You might need to scroll to see the new user.

**NOTE:** To upload a batch of users from the Account Level, see *Uploading Files* on page 238.

ACCOUNT: New US SQA Account (Account Admin) >

Welcome Lucy Kajimoto (lucykajimoto) | [Help & Support](#) | [Logout](#)

Notifications

Contacts

**Users**

Roles

Settings

Users

Uploads

User Management ?

Delete

More actions ▾

Send Invite

Download

+ Add User

Search

[Advanced search](#) [Reset](#)

<input type="checkbox"/>	Registered	First Name	Last Name ^	Role	Last Modified Date	Last Modified By
<input type="checkbox"/>	Yes	Rostom	Aghanian	Account Admin	2014-03-10 12:00:41 PDT	Yelena Petrova
<input type="checkbox"/>		Chris	Chaulk	Organization Admin - Chris Chaulk Test Org anization	2014-01-29 08:47:20 PST	Susan Stoba
<input type="checkbox"/>	Yes	Weicheng	Cheng	Organization Admin - Rots Testing Organiz ation	2013-07-16 18:25:00 PDT	Yelena Petrova
<input type="checkbox"/>	Yes	CMAS_D	Dispatcher	Dispatcher for CMAS - YelPetrova Test Org_ CMAS_New	2013-06-11 16:02:27 PDT	Yelena Petrova
<input type="checkbox"/>	Yes	CMAS_GrL	Goodwell	Group Leader - Yelena Petrova Test Org	2013-08-29 16:25:16 PDT	Yelena Petrova
<input type="checkbox"/>		Lucy	Kajimoto	2	2014-03-03 08:27:16 PST	Lucy Kajimoto
<input type="checkbox"/>		Lucy	Kajimoto	Group Manager	2014-03-03 08:06:31 PST	Lucy Kajimoto
<input type="checkbox"/>	Yes	Lucy	Kajimoto	Account Admin	2014-03-04 07:58:00 PST	Yelena Petrova
<input type="checkbox"/>	Yes	Evie	Kennedy	3	2014-02-12 09:18:50 PST	Lucy Kajimoto
<input type="checkbox"/>		Ralph	Lemmon	Account Admin	2013-04-05 12:10:53 PDT	eb admin

### User Status

### Description




#### Envelope



Send Registration Email. The user is not yet registered.

Select the check boxes in the rows containing the users' names and then click the Send Invite button. (Or, if the Send Invite button is not displayed, select "Member registration" from the Send Invitation Email drop-down list.) Or, click the Envelope icon in the row containing an individual user's name. When the user receives the email, he or she can select the link to go directly to the Registration page. Once registered, the user becomes active and can use the system.

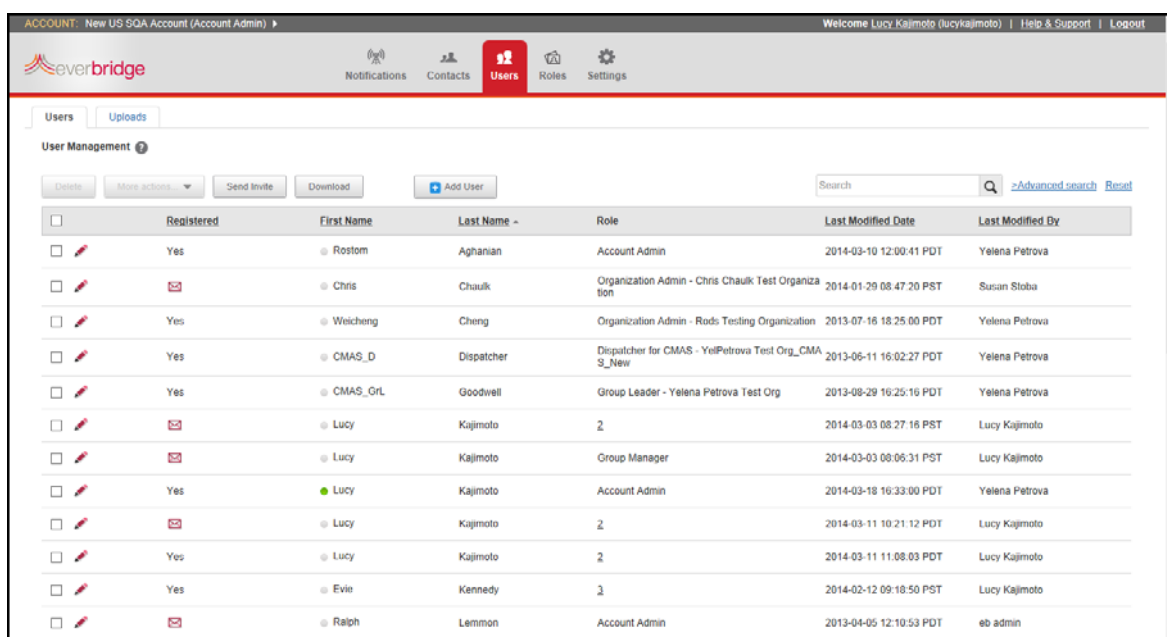


User Status	Description
Device 	Send Mobile Device Registration.  Select the check boxes in the rows containing the users' names and then select "Mobile device registration" from the Send Invitation Email drop-down list. Or, click the Device icon in the row containing an individual user's name. When the user receives the email, he or she can select the link to go directly to the Registration page. Once registered, the user becomes active and can use the Member Portal.  <b>NOTE:</b> You see the Device icon and the "Mobile device registration" selection only if the following three conditions are met: <ol style="list-style-type: none"> <li>1 Your Everbridge representative has selected Mobile Member in the Account/Organization pages of EBAdmin.</li> <li>2 There is a Mobile Member delivery method identified in Settings &gt; Organization &gt; Notifications &gt; Delivery Methods.</li> <li>3 The Private portal type is selected in Settings &gt; Member Portal &gt; Portal Options.</li> </ol>
Grey circle 	The user is active, but not currently logged in.
Green circle 	The user is active, and currently logged in.

## To use Advanced search

You can use the Search feature to find a user by First Name or Last Name. To search by other filters, use the Advanced search feature.

- 1 From the Users tab, click the link: Advanced search.  
The Advanced Search pane appears.



The screenshot shows the Everbridge Users Management interface. At the top, there's a navigation bar with 'Users' selected. Below it, the 'User Management' section has a search bar with 'Advanced search' and 'Reset' links. A table lists users with columns: Registered, First Name, Last Name, Role, Last Modified Date, and Last Modified By. The table contains 14 rows of user data.

Registered	First Name	Last Name	Role	Last Modified Date	Last Modified By
Yes	Rostom	Aghanian	Account Admin	2014-03-10 12:00:41 PDT	Yelena Petrova
	Chris	Chauk	Organization Admin - Chris Chauk Test Organization	2014-01-29 08:47:20 PST	Susan Stoba
Yes	Weicheng	Cheng	Organization Admin - Rodo Testing Organization	2013-07-16 18:25:00 PDT	Yelena Petrova
Yes	CMAS_D	Dispatcher	Dispatcher for CMAS - YelPetrova Test Org_CMAS_New	2013-06-11 16:02:27 PDT	Yelena Petrova
Yes	CMAS_Grl	Goodwell	Group Leader - Yelena Petrova Test Org	2013-08-29 16:25:16 PDT	Yelena Petrova
	Lucy	Kajimoto	2	2014-03-03 08:27:16 PST	Lucy Kajimoto
	Lucy	Kajimoto	Group Manager	2014-03-03 08:06:31 PST	Lucy Kajimoto
Yes	Lucy	Kajimoto	Account Admin	2014-03-18 16:33:00 PDT	Yelena Petrova
	Lucy	Kajimoto	2	2014-03-11 10:21:12 PDT	Lucy Kajimoto
Yes	Lucy	Kajimoto	2	2014-03-11 11:08:03 PDT	Lucy Kajimoto
Yes	Evie	Kennedy	2	2014-02-12 09:18:50 PST	Lucy Kajimoto
	Ralph	Lemmon	Account Admin	2013-04-05 12:10:53 PDT	eb admin



- 2 From the Add Filter Search field, select the desired field from the drop-down list.

ACCOUNT: New US SQA Account (Account Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Notifications Contacts **Users** Roles Settings

Users Uploads

User Management ?

Advanced Search

Field Condition Value

Add Filter Search:

		First Name	Last Name	Role	Last Modified Date	Last Modified By
<input type="checkbox"/>	Yes	Roskom	Aghanian	Account Admin	2014-03-10 12:00:41 PDT	Yelena Petrova
<input type="checkbox"/>	Yes	Chris	Chaulk	Organization Admin - Chris Chaulk Test Organization	2014-01-29 08:47:20 PST	Susan Stoba
<input type="checkbox"/>	Yes	Weicheng	Cheng	Organization Admin - Rods Testing Organization	2013-07-16 18:25:00 PDT	Yelena Petrova
<input type="checkbox"/>	Yes	CMAS_D	Dispatcher	Dispatcher for CMAS - YelPetrova Test Org_CMAS_New	2013-06-11 16:02:27 PDT	Yelena Petrova
<input type="checkbox"/>	Yes	CMAS_Grl	Goodwell	Group Leader - Yelena Petrova Test Org	2013-08-29 16:25:16 PDT	Yelena Petrova
<input type="checkbox"/>	Yes	Lucy	Kajimoto	2	2014-03-03 08:27:16 PST	Lucy Kajimoto
<input type="checkbox"/>	Yes	Lucy	Kajimoto	Group Manager	2014-03-03 08:06:31 PST	Lucy Kajimoto
<input type="checkbox"/>	Yes	Lucy	Kajimoto	Account Admin	2014-03-10 16:33:00 PDT	Yelena Petrova



- 3 Depending on the field you select, a Condition drop-down list and Value (either a text box or list from which to choose).
  - a Select the Condition.
  - b Type or select the Value.
- 4 Click Search.  
The users matching your filtered search are displayed below the Advanced Search pane.

The screenshot shows the Everbridge User Management interface. At the top, there's a navigation bar with 'Users' selected. Below it, the 'Advanced Search' pane is open, showing a search form with 'Field' (Role), 'Condition' (contains), and 'Value' (a list of roles). Below the search form, there's a table of users with columns: Registered, First Name, Last Name, Role, Last Modified Date, and Last Modified By.

Registered	First Name	Last Name	Role	Last Modified Date	Last Modified By
Yes	Rostom	Aghanian	Account Admin	2014-03-10 12:00:41 PDT	Yelena Petrova
Yes	Chris	Chauk	Organization Admin - Chris Chauk Test Organization	2014-01-29 08:47:20 PST	Susan Stoba
Yes	Weicheng	Cheng	Organization Admin - Rads Testing Organization	2013-07-16 18:25:00 PDT	Yelena Petrova
Yes	CMAS_D	Dispatcher	Dispatcher for CMAS - YelPetrova Test Org_CMAS_New	2013-06-11 16:02:27 PDT	Yelena Petrova



### To edit a user profile from the Account Level

- 1 Login as an Account Administrator.
- 2 Select the Users tab.
- 3 Select the Users sub-tab.
- 4 Click the Pencil icon next to the user's name that you want to modify.  
The Update User page is displayed.
- 5 Make your changes.  
See step 5 through step 11 of the procedure *To add a user from the Account Level* on page 23.
- 6 Click Save.

### To delete a user from the Account Level

- 1 Login as an Account Administrator.
- 2 Select the Users tab.
- 3 Select the Users sub-tab.
- 4 Click the check box in the row containing the specific name, and click Delete. (Or, you can edit the user's profile, then click Delete from the Update User page.)
- 5 Click Yes to confirm the deletion.

### To temporarily disable a user at the Account Level

To disable users so they cannot log in, but without deleting their records, perform the following steps. Use this procedure to enable a disabled user as well.

- 1 Login as an Account Administrator.
- 2 Select the Users tab.
- 3 Select the Users sub-tab.
- 4 Click the Pencil icon next to the user's name that you want to modify.  
The Update User page is displayed.
- 5 Click Enable/Disable.
- 6 Confirm the inactivation.  
The user's name is grayed out on the list.

To return to Active status, return to the user's Update User page and click Enable/Disable. Be sure to confirm the change.

If users forget their passwords, they can request help from the Everbridge Manager Portal login page.





## Registering Your User Profile

Your Account Administrator adds a user account for you in the system. Whatever your role in the Everbridge Suite system, you must first register. You will receive an email inviting you to register. Follow the link in the email to the Registration page and complete the process.

### To complete the Registration

- 1 On the New Member Registration page, give yourself a Username.  
You will use this username to login to the Everbridge Manager Portal.
  - User names are case sensitive and must be a minimum of 4 characters.
  - Acceptable characters are:
    - uppercase and lowercase letters
    - numbers
    - period (.)
    - dash (-)
    - underscore (\_)
    - at symbol (@)

No other characters or symbols are permitted at this time.
- 2 Type a password.
  - Passwords must be 8 to 64 characters long.
  - Passwords must not contain user name, First Name, or Last Name.
  - Password must contain at least three of the following four items:
    - Uppercase letter
    - Lowercase letter
    - Number
    - Special character (for example, ! @ # \$)
- 3 Confirm your password.

**NOTE:** Your password expires in 90 days, where you will need to provide a new password. (The new password cannot be any of the past three passwords.) If you change your password during the 90-day period, the counter resets to zero (0) and starts a new 90-day cycle.
- 4 From the Question drop-down list, select a security question that only you will know. If the system needs further information about you, it asks this question.
- 5 In the Answer field, type the answer to the question.
- 6 Click Continue.  
You have successfully registered.
- 7 Click the link: Click here to sign in with your username and password to login for the first time.
- 8 Bookmark the page.



## Logging in to Everbridge Suite

- 1 Access the link to the Everbridge Manager Portal.

- 2 Type your username that you entered when you registered and go directly to step 3. If you forgot your username, perform steps 2a and 2b, next.
  - a Click the link: Forgot Your Username?

- b Type your email address and click Continue.



Your username will be sent to the email address you provide. If more than one account is linked to this address, you might receive multiple emails.

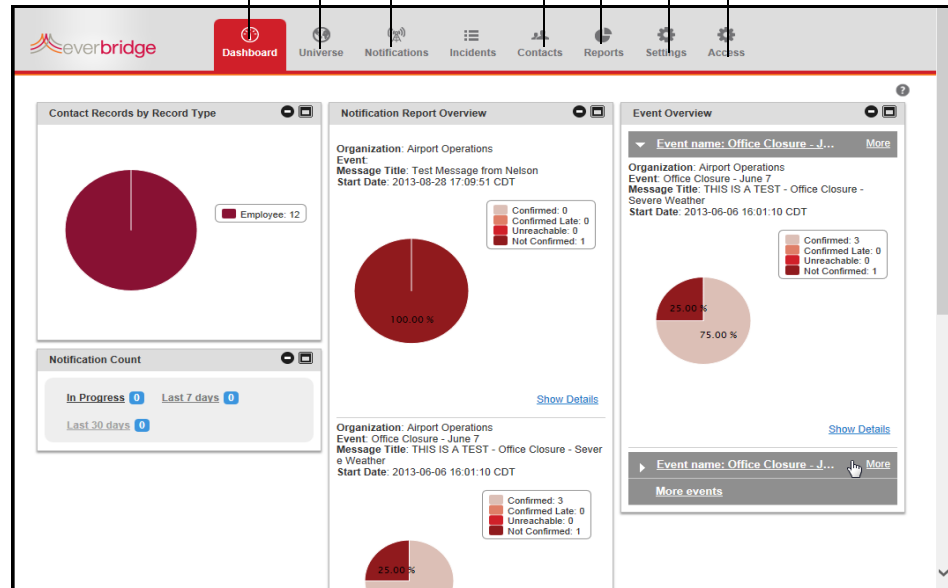
- 3 Press TAB to advance to the next field. (Or, click the mouse button in the next field.)
- 4 Enter your password information and go directly to step 5. If you forgot your password or become locked out of the system, perform steps 2a and 2b, next.
  - a Click the link: Forgot Your Password?

- b Type your Username and click Continue.  
A temporary password will be sent to the email address that you provided during the registration process.
- 5 To change the application language from English (United States), select the desired language from the drop-down list to the right of the Sign In pane.
- 6 See the Everbridge Suite page that appears.



Depending on your permissions, you might not see all the Navigation tabs that are in the following example. In this example, the Dashboard tab is shown.

Navigation tabs



7 Review the following information about each Navigation tab:

Tab	Description
Dashboard	The Dashboard displays customizable panels of information about the activities in your Everbridge Suite organization.
Universe	The Universe allows you to select contacts for a notification in a geographic area.
Notifications	The Notifications tab begins with displaying the status of notifications in the Active/History sub-tab. Other sub-tabs include Schedules, Templates, and Message Templates. You can also add a New Notification from this tab.
Contacts	This is the Contact Management tab where you can add and maintain contacts. Administrators can upload Contacts, and add Groups and Rules. Administrators and Group Managers, if given permission, can manage calendars from the Scheduling sub-tab.
Reports	The Reports tab allows you to view Quick Reports (for example, Notification Analysis and Event Analysis). Administrators can add Custom Reports.
Settings	The Settings tab is provided for Administrators to configure settings specific to your organization.
Access	The Access tab is displayed only if Organization Administrators have been given permission to manage users and roles.



- 8 Click the navigation tab on which you need to work.
- 9 If you are assigned multiple roles, see the procedure *To select your organization and role* on page 233.

## To make changes to your user profile

Once you have logged in to the Everbridge Suite system, you can make changes to your user profile, your password, your security question, and/or your site language.

The screenshot shows the Everbridge user profile page. The top navigation bar includes the Everbridge logo and tabs for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, and Settings. The left sidebar shows the user's name 'Lucy Kajimoto' and a list of profile management options: 'My Profile', 'Change Password', 'Change Security Question', and 'Language'. The main content area is divided into two sections: 'General information' and 'Role information'. The 'General information' section contains fields for First Name (Lucy), Middle Initial, Last Name (Kajimoto), Suffix, Email Address (lucy.kajimoto@everbridge.com), Contact, and Time Zone (set to (GMT -8:00) Pacific Standard Time(America/Los\_Angeles)). The 'Role information' section displays a table with columns for Organization, Role, and Group, showing the user's role as 'Account Admin'. An 'Update' button is located below the role information table. The footer contains links for Privacy and Terms of Use, and a copyright notice for 2014 Everbridge, Inc.

## To change your profile

- 1 Click your name, located in the top right-hand corner of the page. Your user profile is displayed.
- 2 Edit your information, as needed, and click Update.

## To change your password

- 1 Click Change Password from the left-hand panel.



The Change Password panel is displayed.

The screenshot displays the Everbridge user interface. At the top, a navigation bar includes the Everbridge logo and links for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, and Settings. On the left, a user profile for Lucy Kajimoto is shown with a list of options: My Profile, Change Password, Change Security Question, and Language. The main content area is titled 'Change Password' and prompts the user to enter a new password. It includes a Username field with the value 'lkajimoto', and three password fields: Current Password, New Password, and Confirm New Password. A 'Save' button is located at the bottom of the form. The footer contains links for Privacy and Terms of Use, and a copyright notice for 2014 Everbridge, Inc.

- 2 Enter the password information in the fields and click Save.  
(The new password cannot be any of the past three passwords.)

### To change your security question

- 1 Click Change Security Question from the left-hand panel.



The Change Security Question panel is displayed.

ACCOUNT: New US SQA Account (Account Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

everbridge

Notifications | Contacts | Users | Roles | Settings

Lucy Kajimoto ?

My Profile >

Change Password >

Change Security Question >

Language >

**Change Security Question**

Please select your new question.

Question:

What is the city or town where your mother and father met?

Answer:

Los Angeles

Password:

Save

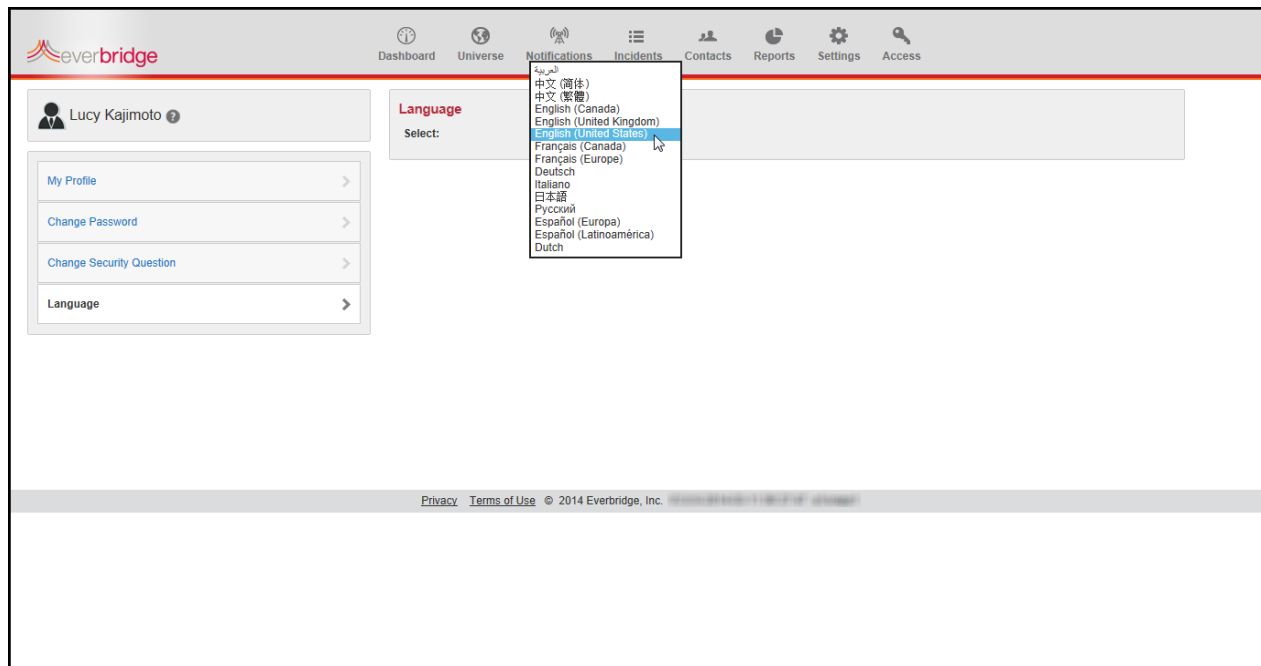
Privacy | Terms of Use | © 2014 Everbridge, Inc. All rights reserved. No part of this publication may be reproduced without prior written permission.

- 2 Select a new question from the drop-down list.
- 3 Type the answer to the question.
- 4 Type your password and click Save.



## To change the Language from US English

- 1 Select Language from the left-hand panel.



- 2 Select your desired language from the drop-down list.
- 3 Click Update.





# Help & Support

In the main navigation bar of the application, you can select Help & Support menu for:

- ◇ Online Help
- ◇ Everbridge University
- ◇ Contact Support

The screenshot displays the Everbridge application interface. At the top, the navigation bar includes the Everbridge logo, a clock icon, and several menu items: Dashboard, Universe, Notifications, Incidents, Contacts (highlighted in red), Reports, Settings, and Access. A 'Help & Support' dropdown menu is open, showing three options: Online Help, Everbridge University, and Contact support. Below the navigation bar, the 'Contacts' section is visible, featuring a table of contact information. The table has columns for First Name, M.I., Last Name, Suffix, External ID, Record Type, Last Modified Date, and Last Modified By. The table lists 12 contacts, including Craig Barrick, Sharon Bennett, Scott Colby, Brad Currier, Yvonne Gallegos, Lucy Kajimoto, Cindy Kwok, Happily Li, Sheila Morgan, Lemon Tu, Linder Wang, and Lori Williams. The 'Contacts' menu item in the navigation bar is also circled.

	First Name	M.I.	Last Name	Suffix	External ID	Record Type	Last Modified Date	Last Modified By
<input type="checkbox"/>	Craig		Barrick		8185772201	Employee	2014-06-10 10:50:49 PDT	Lucy Kajimoto
<input type="checkbox"/>	Sharon	M	Bennett		3.22E+18	Employee	2014-04-02 10:09:00 PDT	Lucy Kajimoto
<input type="checkbox"/>	Scott		Colby		8185772220	Employee	2014-07-28 08:19:37 PDT	Lucy Kajimoto
<input type="checkbox"/>	Brad		Currier		8185772321	Employee	2014-04-02 10:06:54 PDT	Lucy Kajimoto
<input type="checkbox"/>	Yvonne		Gallegos		8182309748	Employee	2014-06-03 10:35:23 PDT	Lucy Kajimoto
<input type="checkbox"/>	Lucy		Kajimoto		8182309732	Employee	2014-04-02 10:06:54 PDT	Lucy Kajimoto
<input type="checkbox"/>	Cindy		Kwok		8185772382	Employee	2014-04-02 10:14:16 PDT	Lucy Kajimoto
<input type="checkbox"/>	Happily		Li		Beijing03	Member Portal	2014-06-19 10:32:32 PDT	Lucy Kajimoto
<input type="checkbox"/>	Sheila		Morgan		8185772219	Employee	2014-04-02 10:14:16 PDT	Lucy Kajimoto
<input type="checkbox"/>	Lemon		Tu		Beijing01	Employee	2014-06-09 17:27:55 PDT	Lucy Kajimoto
<input type="checkbox"/>	Linder		Wang		Beijing02	Opt-in	2014-06-09 17:30:03 PDT	Lucy Kajimoto
<input type="checkbox"/>	Lori		Williams		8185772205	Opt-in	2014-04-02 10:06:54 PDT	Lucy Kajimoto



## Online Help

Selecting Online Help provides help for the Everbridge Suite system. In addition, you can click any Help (?) button on a page to access context-sensitive help.

Home > Welcome

### Welcome

This is your reference to the Everbridge Suite. It provides information about the Everbridge Suite to enable you to quickly set up configuration options and then use the system.

Click here to start with the Introduction. Or, open a topic from the Table of Contents to the left, by clicking the Contents tab in the upper left-hand corner, then clicking the book you want to open. Finally, select the topic you are interested in reviewing.

From the Search tab, you can type a word or words to find topics. Your word can be a partial word. For example, if you type "off", the search might find all words with "office" and "off". To search for a phrase, enclose the phrase in quotation marks.

From the Glossary tab, you can select the glossary term from the list to see the definition of that term.

Select the Back tab to return to the previous page.

To view and/or print the PDF-formatted guides, visit Everbridge University. From the Help & Support link, select Everbridge University. Login to the Everbridge Client Portal, and select the Everbridge University tab or click the Watch Everbridge University Courses icon. From the My Learning tab, select the product category (such as Everbridge Suite). Select the documentation category (such as MN - IV Documentation). Then, click Launch (or Review if previously opened) to see the list of PDFs. Click Open (or Continue if previously opened) to view the desired PDF. Optionally, once the PDF has downloaded, to print, right-click anywhere on the PDF and select Print. You can print the PDF in duplex (2-sided) mode to save resources.

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### Overview of Contacts

The Contacts tab is where you can create and maintain Contacts. See [Roles](#) for an understanding on who can perform Mass Notification activities such as manage contacts, send notifications, and create groups and rules.

Some examples of your system of record for your contact data follow:

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

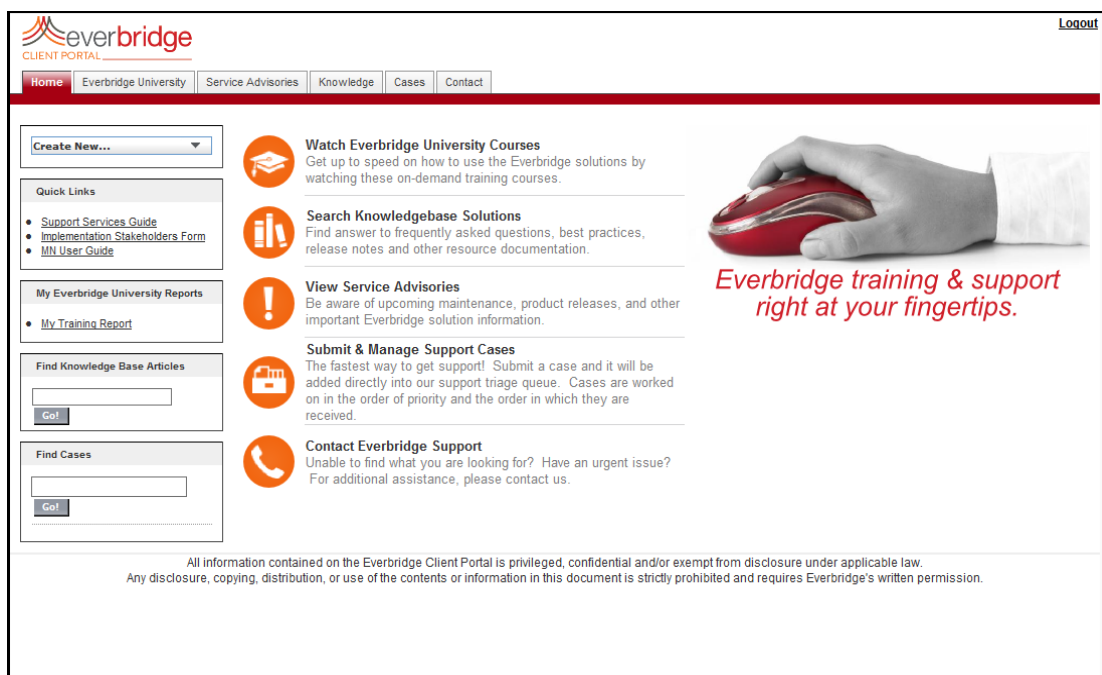
An organization sends notifications to its own contacts. The contacts in an organization can be assigned to one or more groups. You can select one or more groups to receive a notification. An account administrator can create a Group Manager for a group within an organization.

### The Main Contacts Page



# Everbridge University

Selecting Everbridge University launches the Everbridge Client Portal Sign In dialog. Type your User Name and Password to access the Everbridge Client Portal.



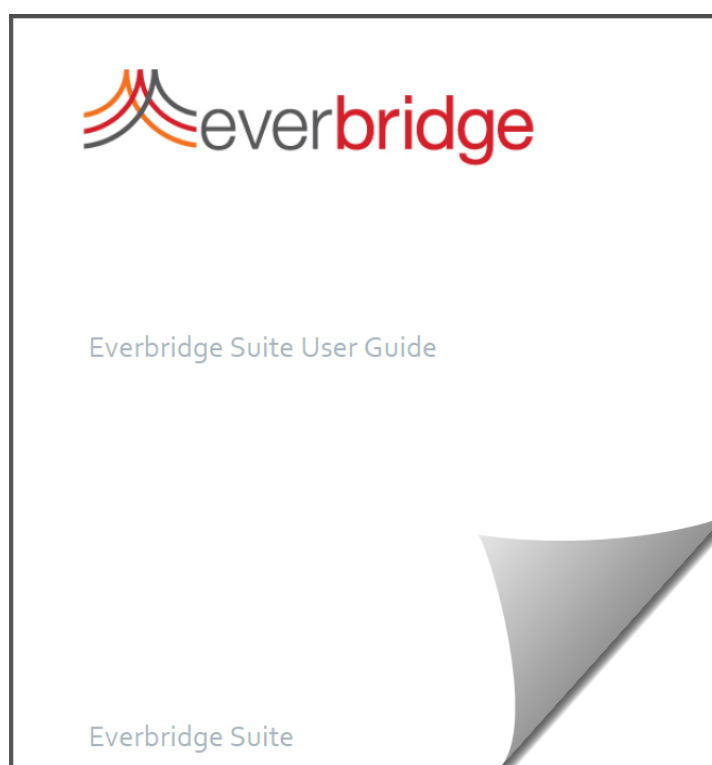


When the Client Portal appears, select the Everbridge University tab or the Watch Everbridge University Courses icon. You can view the video tutorials according to your organization's training plan. From the My Learning tab, select the desired category. In this case, select the product name, Everbridge Suite. You can choose to watch lessons by Feature and/or by Role.





In addition, you can view and/or print the PDF-formatted user guides. Select the documentation category: MN-IV Documentation. Then, click Launch (or Review if previously opened) to see the list of PDFs. Click Open (or Review if previously opened), then click the Attachment button (looks like a paper clip) in the playbar and select the desired filename. Finally, select the link: Click to Download. Optionally, once the PDF has downloaded, to print, right-click anywhere on the PDF and select Print. You can print the PDF in duplex (2-sided) mode to save resources.



## Contact Support

Selecting the Contact Support link launches the Everbridge Client Portal. Sign In dialog. Type your User Name and Password to access the Everbridge Client Portal. When the Client Portal appears, select the Contacts tab or the Contact Everbridge Support icon.



# Dashboard

This chapter provides information about the Dashboard.

**The following topics are covered:**

- ◇ *Overview of the Dashboard*
- ◇ *Notification Count*
- ◇ *Notification Report Overview*
- ◇ *Contact Records by Record Type*
- ◇ *Event Overview*
- ◇ *Customizing the Dashboard*

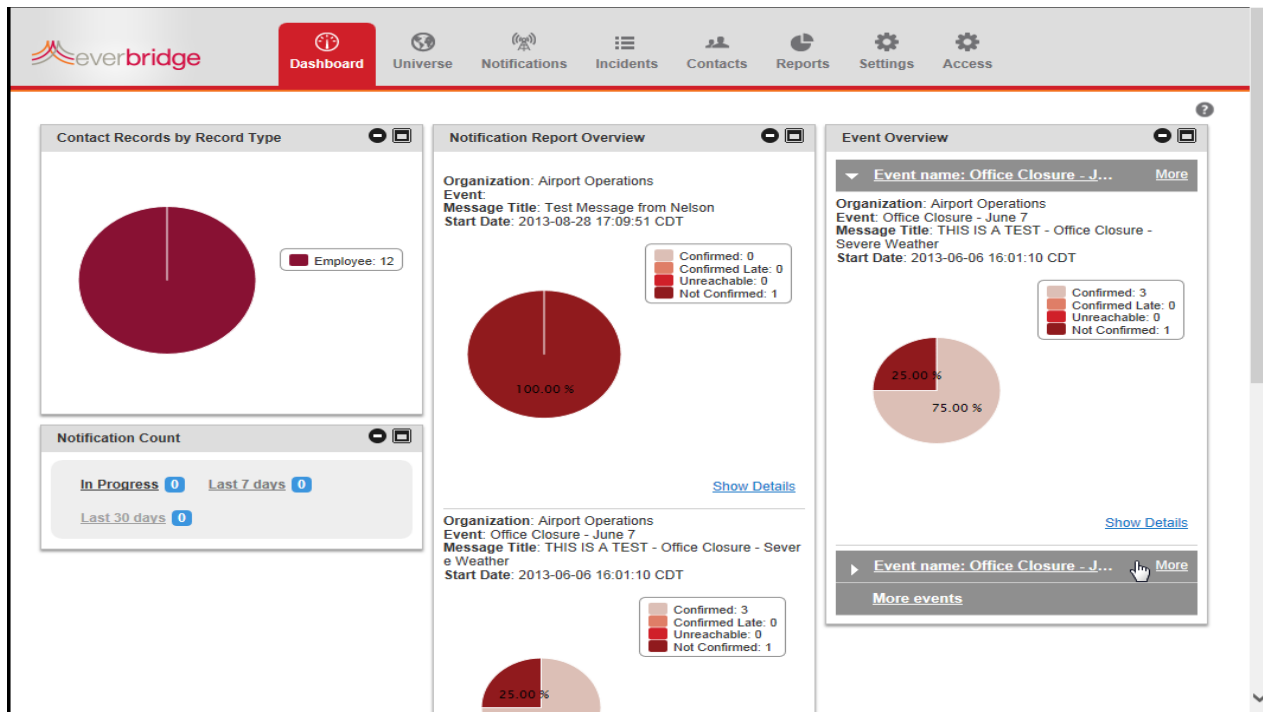


# Overview of the Dashboard

Depending on your user role, after logging in, the first page you see is the Dashboard. The panels display summary information about notifications, events, and contacts. You can use these displays to view a quick snapshot of current and recent activity. You can drill down into detailed information about your notifications from this Dashboard tab. You can customize the arrangement of the panels on the page to make it convenient for you to monitor your status.

The panels on the Dashboard tab allow you to track a number of items, including.

- ♦ the number of active and recent notifications
- ♦ the number and type of contacts in your database
- ♦ summaries of recent notifications
- ♦ summaries of recent events







# Notification Count

Depending on your user role, you may see only counts for your role's notifications or counts for all notifications. The Notification Count panel shows you how many notifications:

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



Click the count to drill to the Notification History for that time period. For example, clicking the count on Last 7 days causes the Notifications tab to appear showing the Notifications History for the last 7 days.

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Dashboard Universe **Notifications** Incidents Contacts Reports Settings

Notifications ?

+ New Notification

In Progress 0 Last 7 days 0 Last 30 days 1

Active/History Scheduled Templates Message Library

Search

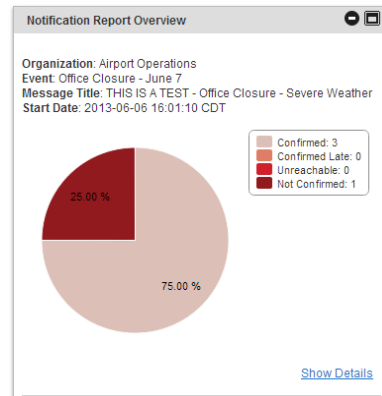
Status	Published	Title	Event Name	Sent On	Sent By	Sent To	Charts
✓ Actions		<a href="#">2 Way SMS Test from Rod</a>		2014-01-10 11:44:25 PST	Rod Lemmon	1	
✓ Actions		<a href="#">Scheduled for 9:10 am Updated after</a>		2013-10-25 09:10:29 PDT	Rod Lemmon	1	
✓ Actions		<a href="#">Scheduled for 9:10 am</a>		2013-10-25 09:10:00 PDT	Rod Lemmon	1	
✓ Actions		<a href="#">SMS NZ</a>		2013-08-29 14:34:54 PDT	Rod Lemmon	1	
✓ Actions		<a href="#">SMS UK</a>		2013-08-29 14:33:47 PDT	Rod Lemmon	1	
✓ Actions		<a href="#">Philippines SMS</a>		2013-08-29 14:32:30 PDT	Rod Lemmon	1	



---

## Notification Report Overview

The Notification Report Overview displays summaries of your most recent notifications. For each notification in the panel, you can see the message name and when the message was sent. If it was part of an event, you will see the name of the event as well. You will see a pie chart showing the confirmation status of the contacts.





Click Show Details from the desired Broadcast Report to view the full report.

Notifications > Active/History > Details ?

**SENT THIS IS A TEST - Office Closure - Severe Weather** ID:4402341490632

Rebroadcast Send Follow Up

Status Method

Confirmed: 3  
Confirmed Late: 0  
Unreachable: 0  
Not Confirmed: 1

**Details**

Notification Type: Standard  
Priority: No  
Recurring: No  
Sent From: Mobile URL  
Start: 2013-06-06 16:01:10 CDT  
End: 2013-06-06 17:01:10 CDT  
Sent by: MassNotification Dispatcher1  
Sent to: 4 contacts  
Voice Recording: None  
Event: Office Closure - June 7  
Message Format: Text

**Message**

THIS IS A TEST - Office Closure - Severe Weather  
THIS IS ONLY A TEST OF OUR EMPLOYEE ALERT SYSTEM. All staff is advised that our office will be closed tomorrow due to the impending severe weather for this area. Remain at home and contact your supervisor at your regularly scheduled start of the day to report your status. Office closure procedures will be in effect until further notice. THIS HAS BEEN A TEST OF OUR EMPLOYEE ALERT SYSTEM.

Delivery Details Settings

Confirmed	Contact Name	Confirmed Method	Confirmed Method Value	Confirmation Time	First Attempt Time
+ Y	Nelson Daza	Work Email	nelson.daza@everbridge.com	2013-06-06 16:01:58 CDT	2013-06-06 16:01:21 CDT
+ N	Dave Brown				2013-06-06 16:01:21 CDT
+ Y	Gaylene Kelly	Work Email	gaylene.kelly@everbridge.com	2013-06-06 16:15:38 CDT	2013-06-06 16:01:21 CDT

If needed, from the Dashboard tab, scroll down to the bottom of the list of notifications. At the bottom of the list, click More. The complete Notifications History from the Notifications tab appears.

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Dashboard Universe **Notifications** Incidents Contacts Reports Settings

Notifications ?

New Notification

In Progress 0 Last 7 days 0 Last 30 days 0

Active/History Scheduled Templates Message Library

Search

Status	Published	Title	Event Name	Sent On	Sent By	Sent To	Charts
✓ Actions		<a href="#">Test Message from Nelson</a>		2013-08-28 17:09:51 CDT	Nelson Daza	1	
✓ Actions		<a href="#">THIS IS A TEST - Office Closure - Severe Weather</a>	<a href="#">Office Closure - June 7</a>	2013-06-06 16:01:10 CDT	MassNotification Disp...	4	
✓ Actions		<a href="#">THIS IS A TEST - Office Closure - Severe Weather</a>	<a href="#">Office Closure - June 6</a>	2013-06-06 13:42:35 CDT	MassNotification Operator1	4	
✓ Actions		<a href="#">Test Polling Notification</a>		2013-05-16 19:04:34 CDT	Nelson Daza	1	
✓ Actions		<a href="#">Cross org test</a>		2013-03-12 14:15:53 CDT	Dave Brown	1	
✓ Actions		<a href="#">Test MN Notification from QA1</a>		2013-03-07 16:16:16 CST	Nelson Daza	1	



Under the Status column, the green icon indicates the notification is Active. The gray check mark indicates the notification has been sent. the red X indicates the notification has been stopped. Respective actions are Stop (if Active), Rebroadcast, or Send Follow Up.

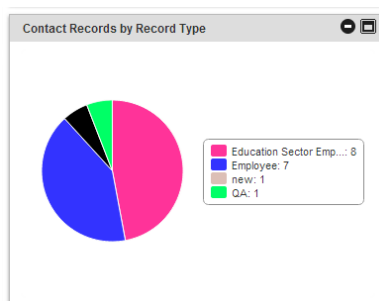
Under the Published column, hover the mouse over the P to see which publishing option was used.



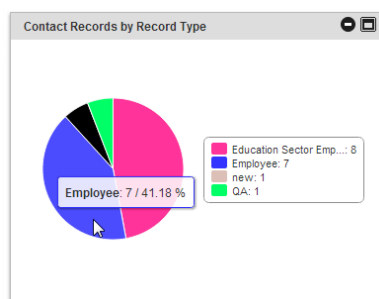
# Contact Records by Record Type

Account Administrators define various Contact Record Types that are available when adding members to the system. Typically, they would do this to filter their target population or to segment different types of contacts from others. Some examples include:

- ◇ Employee
- ◇ Contractor
- ◇ Visitor
- ◇ Partner
- ◇ Internal Personnel
- ◇ Citizen



The chart in the Contact Records by Record Type panel shows the number and percentage of contacts with each record type. Hover the mouse over the pie chart to see the count and percentage of each section.



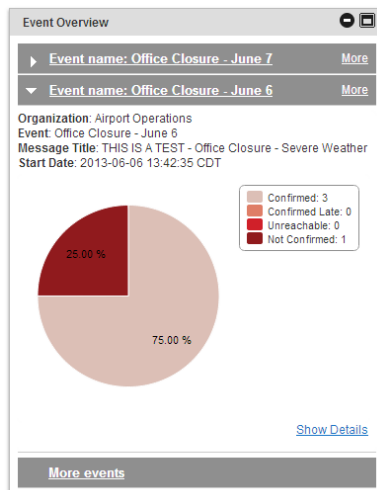
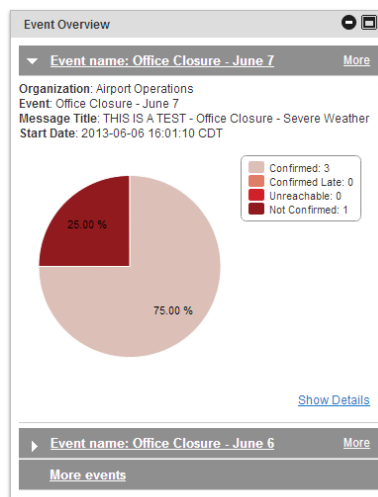
When contacts are added to the system, the Record Type is part of the information. Your organization added record types that are meaningful in your business.



## Event Overview

The Event Overview panel displays the summaries of recent events. From here, you can drill into the details of those events. Locate an event (scroll down if needed). To view the notifications in an event, click the arrow next to the name of the event to expand it. There is a summary for each notification in the event. Drill down to the Event Analysis by clicking More in the title bar for this event.

On the Dashboard tab, drill down to a Notification Report by clicking Show Details in a notification that is part of the event. To see a list of all events, not just the most recent ones, click More Events at the bottom of the Event Overview panel.



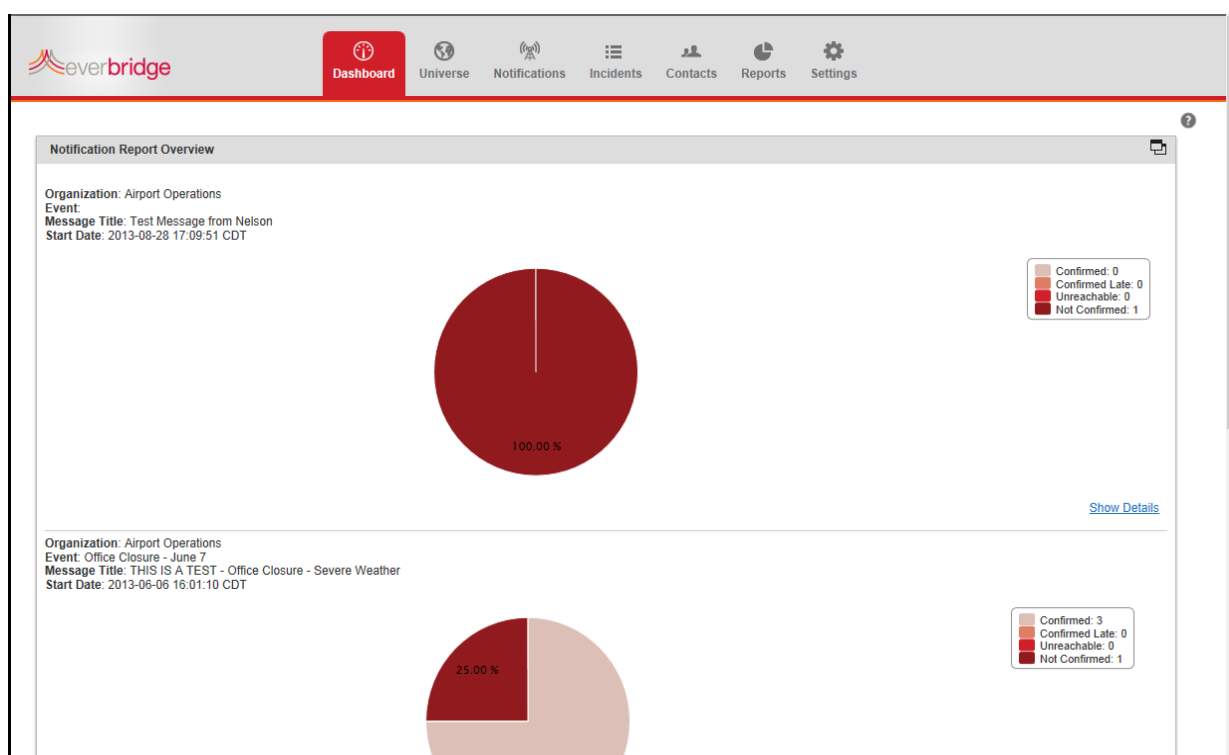


# Customizing the Dashboard

If your user role permits you to have access to the Dashboard, when you first view the Dashboard tab, the panels are arranged in three columns. The panels are open for viewing. You can customize the layout of the Dashboard panels for your convenience.

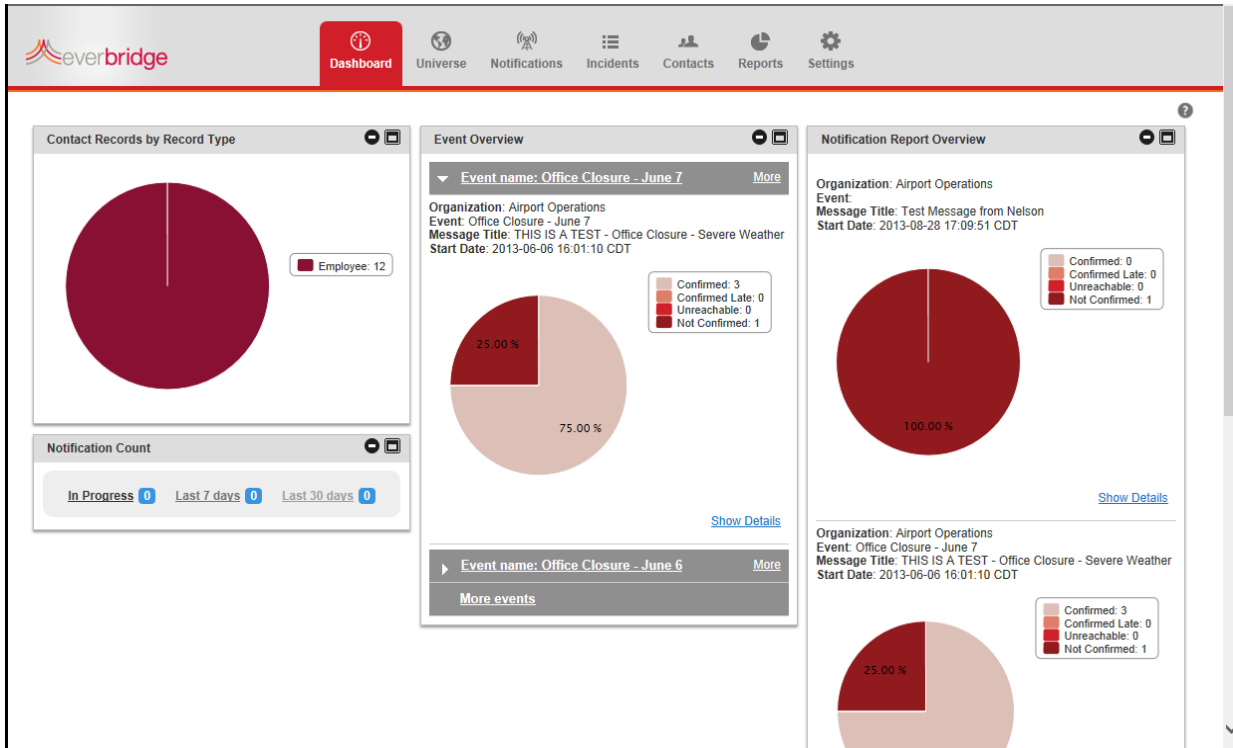
Close a panel by clicking the Collapse icon (-). Click the Expand icon (+) to open the closed panel for viewing.

Click the Maximize icon to enlarge the panel for full-page viewing. Click it again to return the panel to the default size.





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





# Universe

This chapter provides information about the Universe tab. The Universe tab allows you to select contacts for a notification in a geographic area.

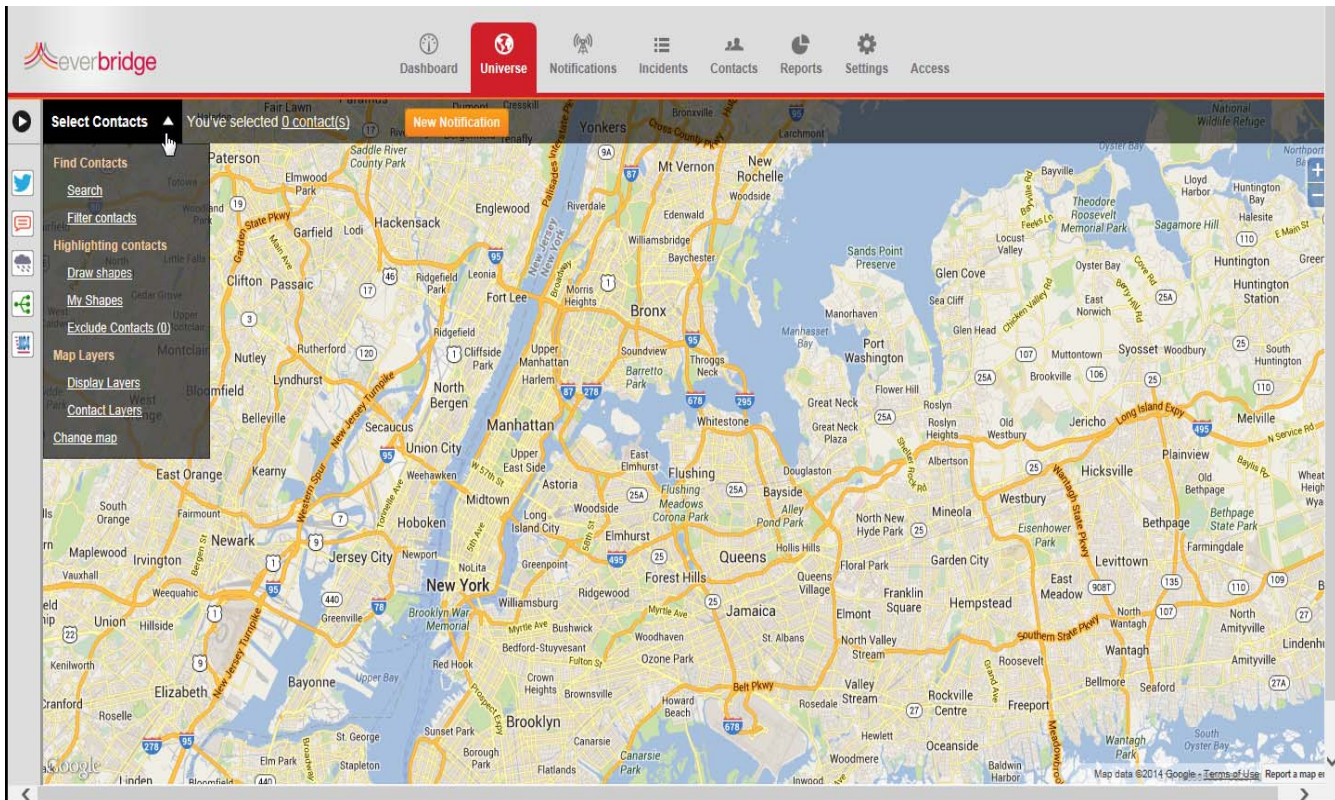
**The following topics are covered:**

- ◇ *Overview of the Universe*
- ◇ *Using Search from the Map*
- ◇ *Understanding Shapes*
- ◇ *Adding and Sending a Notification*



# Overview of the Universe

From the Universe tab, the default map location appears. It is your virtual workspace. You can find contacts using the Select Contacts drop-down menu, or see existing Contact information by clicking a Contact symbol (a dot) on the map.



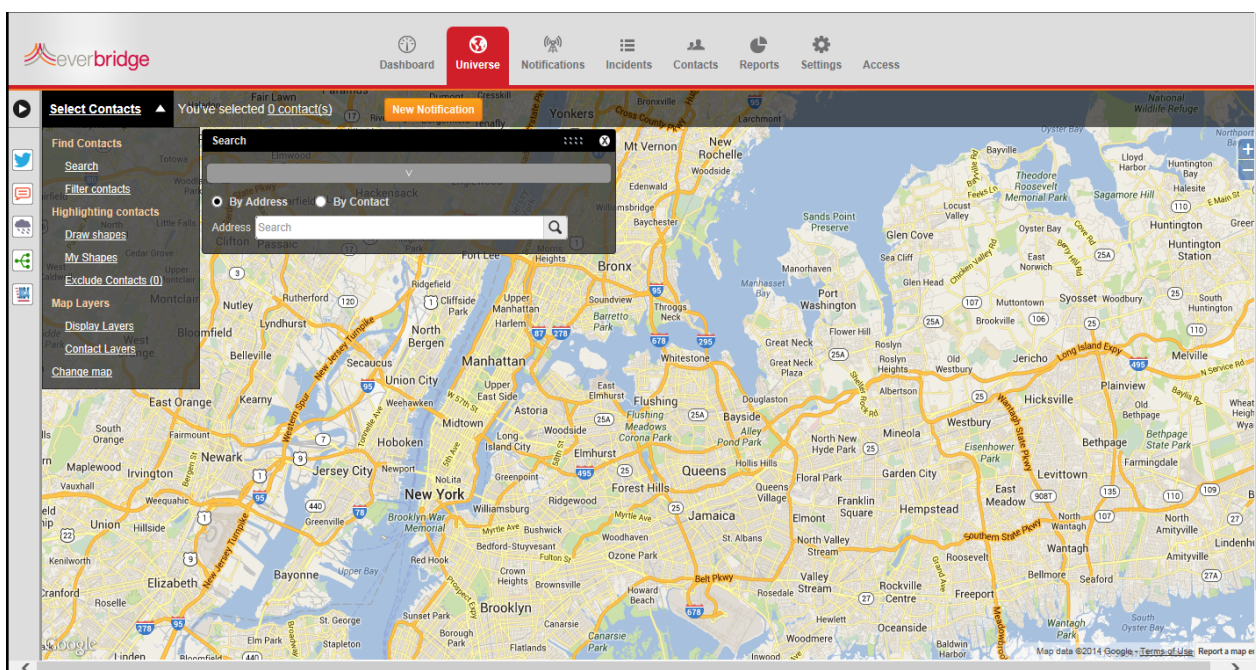
You can search any location, including foreign country locations. You can change the map views (such as Google Maps, Bing Road, ESRI Streets, and so forth) and map zoom levels:

- ◇ Level 1 - World
- ◇ Level 2 - Country
- ◇ Level 3 - State
- ◇ Level 4 - County
- ◇ Level 5 - City
- ◇ Level 6 - Town
- ◇ Level 7 - Neighborhood
- ◇ Level 8 - Street

Select Filter Contacts to remove any unwanted Contact symbols from the map. (You can use an existing Rule.)

# Using Search from the Map

The Search feature in the Universe is for locating the reference for the event. You can search by address or by contact name. When the search results are displayed, you can choose to show them on the map. The Search feature is case-insensitive.



**By Address**—Note the following when searching By Address:

- ◊ The address does not need to be in your Contacts database because the Search is not.
  - ◊ Be precise for geo-coding.
  - ◊ Other than a specific street address, you can search the following:
    - Points of Interest such as landmarks—type the landmark name. For example, **Disneyland**, where you select the address from the Search results.
    - Intersections—type street intersections. For example, **N Brand Blvd and E Lexington Dr**, where you select the address from the Search results.
    - Postal codes—type the post code for the country you are searching.
      - In Great Britain, type the post code (between 5 and 7 alphanumeric characters with a space before the last 3 alphanumeric characters). For example, **EC1Y 8SY**.
      - In the United States, first type the words **ZIP code**, then the actual 5-digit postal code. For example, **ZIP code 91203**. If you type only the 5-digit postal code, the search could find matching post codes in different countries.
- Select one of the results, then select the Show on Map button if you are satisfied.

**NOTE:** Everbridge does not provide shapes for postal codes.

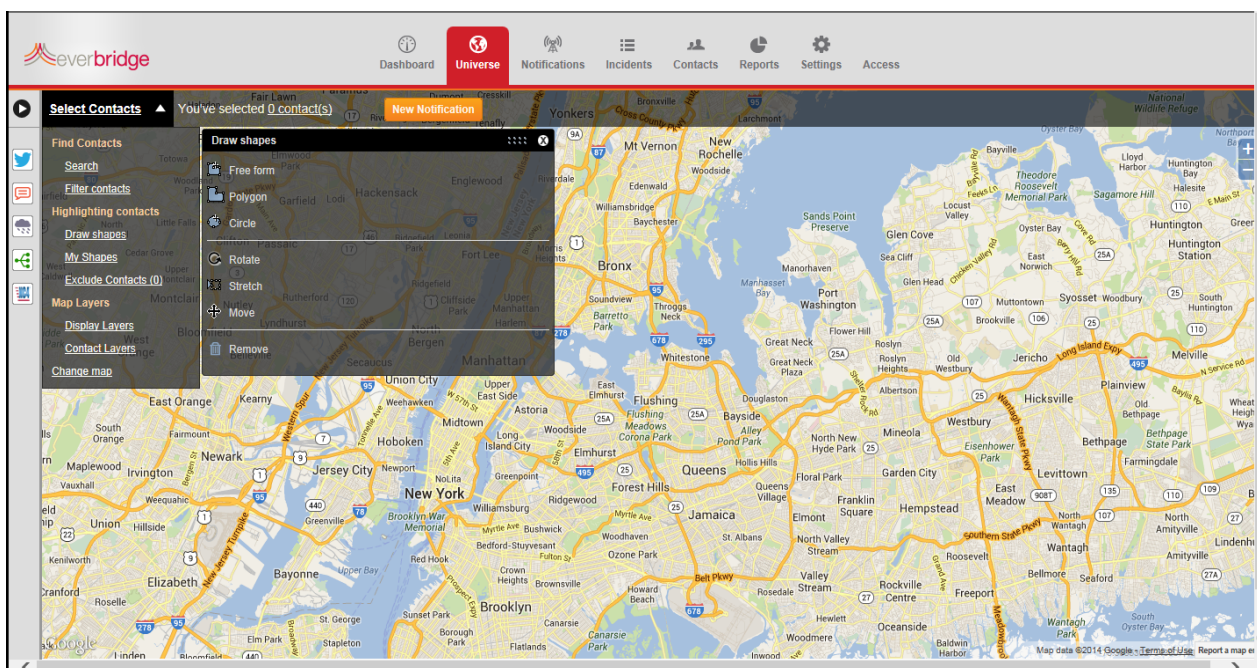


- ◇ **By Contact**—Note the following when searching By Contact:
  - Searches your Contacts database.
  - The Search retrieves only the records that have a geo-coded address (because you are in the Universe view).
  - If your Contacts database includes all fire stations in Glendale, CA, for example, you could search for them (all fire stations in Glendale, CA) by Filter Contacts > Use filters.
    - Select the Location Name field, Contains condition, and type **Fire** in the Value text field.
    - Select the City field, Equal to condition, and type **Glendale** in the Value text field.
    - Click Search.



# Understanding Shapes

You can draw the following types of shapes from the Universe tab.



- ◇ **Free form:** Used to draw free-form shapes. For example, to draw borders of a county. Click the mouse at the starting point of your shape and while holding down the mouse button, drag the mouse to add your free-form shape. Release the mouse button. (Think of it as using a pencil to draw without lifting the pencil.)
- ◇ **Polygon:** Similar to drawing a free-form shape, except the polygon only paints straight edges. Click the mouse at the starting point of your shape and while holding down the mouse button, drag the mouse to the next point, and click the mouse button. Continue to drag the mouse and click until your polygon is complete. When complete, double-click the mouse.
- ◇ **Circle:** Click the center of the circle and while holding down the mouse button, drag the mouse to resize the circle. Release the mouse button. Alternatively, click Search and enter an address that will be the center of the circle. From there, you can resize the circle manually or set a marker on the map with a specific radius.

## To draw shapes

- 1 From the Universe tab, select the link Draw shapes from the Select Contacts menu in the upper left-hand corner of the map.  
A Draw shapes menu appears.
- 2 Select the desired shape: Free Form, Polygon, or Circle.



- 3 Click the mouse button as described in *Understanding Shapes*.

**NOTE:** If you draw a shape on the map while a contact upload is in progress or as an individual contact is updated, the application selects contacts whose records are in the database even if the map tile server has not been refreshed. The map tiles for the contact layers are refreshed when the upload is complete. The dots on the map are visual representations from the database.

### To rotate a shape

- 1 Select Rotate from the Draw Shapes dialog.
- 2 Select the shape on the map.  
The shape changes color on the map.
- 3 Look for the “rotation handle,” a round yellow dot.  
The rotation handle is located close to the shape, but not on it.
- 4 Select a rotation handle and drag the mouse to the new location.
- 5 Release the mouse button.

### To stretch a shape

- 1 Select Stretch from the Draw Shapes dialog.
- 2 Select the shape on the map.  
The shape changes color on the map.
- 3 Look for the “anchors,” round yellow dots.  
Each shape type has a different number of anchors.
- 4 Select an anchor and drag the mouse to the new location.
- 5 Release the mouse button.

### To move a shape

- 1 Select Move from the Draw Shapes dialog.
- 2 Select the shape on the map.  
The shape changes color on the map.
- 3 Look for the + sign located in the center of the shape.
- 4 Click the + sign and drag the mouse to the new location.
- 5 Release the mouse button.

### To delete a shape

- 1 Click Remove from the Draw shapes menu.
- 2 Select the shape on the map.  
The shape changes color on the map.
- 3 Click the X in the shape.



## Saving Shapes

You can save shapes that you draw on the map or upload the shapes from the Settings tab. You save the shapes as “shape files” in your library, My Shapes. You can retrieve the shape files from My Shapes.

**NOTE:** If you upload shapes to My Shapes, make sure there are only shapes, and not nested folders, contained in the compressed file (zip file). In other words, the zip file can only contain the shapes.

My Shapes is a library of previously uploaded or saved shapes, KML (Keyhole Markup Language) files, or shape files (well-defined polygons).

My Shapes is located in Organization > Map. You can add folder names for your shapes from Settings > Map. This way, you can find the desired shapes quickly rather than scrolling a lengthy list of shape names.

### To use files in My Shapes

- 1 From the Universe tab, select My Shapes from the Select Contacts drop-down list. Your shape might be organized in a folder.
- 2 Select the desired folder to open it.
- 3 Click Load for the shape you want to load.  
The shape appears on the map. You can use any of the shape tools on this shape. You can draw other shapes on the map to include more contacts or exclude contacts from this shape.
- 4 View the contacts in the shapes by selecting the link: You’ve select *NN* contact(s), where *NN* is the number of contacts.  
If needed, you can remove shapes by clicking the Trash Bin in the row of the shape to be deleted. To remove all shapes, select Clear All.
- 5 To save the shapes to My Shapes:
  - a Click the link: You’ve selected *NN* contact(s).
  - b Select the check box of each desired shape.
  - c Click Save to My Shapes.
  - d Type a name for the shape.
  - e Optionally, in the Folder field, select the existing folder name from the drop-down list or type a new folder name.
  - f Click Save.
- 6 Click the X in the upper right-hand corner of the My Shapes dialog.



### To exclude contacts by name or address

- 1 From the Universe tab, select Exclude Contacts from the Select Contacts drop-down list. The Exclude Contacts dialog is displayed. You can exclude by name (step 2) or by address (step 3).
- 2 To exclude by name:
  - a Make sure that Full Name is selected from the Search contacts by drop-down list.
  - b Type the first and last name (or just the first name) of the contact to exclude.
  - c Click Search.
  - d Proceed to step 4.
- 3 To exclude by address:
  - a Select Street Address from the Search contacts by drop-down list.
  - b Type the address you want to exclude.
  - c Click Search. Contact names are displayed who list that address for one of their locations.
  - d Proceed to step 4.
- 4 Select the check box next to each contact name you want to exclude. (To exclude all the contacts, select the check box in the column heading row.)
- 5 Click Exclude.
- 6 Click the Excluded List sub-tab to view the excluded contacts.

To remove a contact from the “excluded” list, select the check box next to each contact name you want to remove. To remove all contacts from the “excluded” list, select the check box in the column heading row and click Include. The contacts will be included for notification.

## My Shapes User Messages

The following table lists the My Shapes user messages and their possible root causes.

Message	Possible Root Cause
The file you have uploaded is empty.	The file does not contain the expected objects.
The file does not contain valid shapes.	The file is not empty, but contains invalid content (for example, an image file, more than one folder, the folder name contains a space, and so forth).
One or more shapes cannot be loaded {plus additional detail if available}.	The file contains a shape that is not a closed, single loop polygon; for example, an open polygon, nested polygons (multiple loops), self-intersecting polygons, and so forth.
One or more circle shapes in this file are missing a center or a radius.	One or more circle polygons in the file are missing information needed to draw the shape.
File size exceeded 100 MB.	The file is larger than 100 MB.
Only .ZIP or .KML files are supported.	The file has an extension other than .ZIP or .KML.
File import failed.	The file is empty, the shape object is empty, or detailed root cause could not be identified.





# Map Layers

There are two types of map layers in the Universe tab: Display Layers and Contact Layers.

## Display Layers

A display layer is any type of shape that you want to overlay on the map. It is a way for you to lay reference information on top of the map. For example, it could be a county or city boundaries, a school district, or even school buildings.

In the Settings tab, under Map > Display Layers, you can add display layers or import shape files in a compressed file (zip format).

**NOTE:** If you upload shapes to Display Layers, make sure there are only shapes, and not nested folders, contained in the compressed file (zip file). In other words, the zip file can only contain the shapes.

For example, you might have a display layer showing areas in a water district. By combining this display layer with a contact layer of citizens who have opted in to be notified of hydrant flushing, you can target the correct contacts.

### To use Display Layers

- 1 From the Universe tab, select Display Layers from the Select Contacts drop-down list.
  - The Display Layers dialog is displayed. The list displays the layers that have been loaded by your organization.
- 2 Select the check box of a layer to display it on the map. (Clear the check box to hide the display layer.)

## Display Layers User Messages

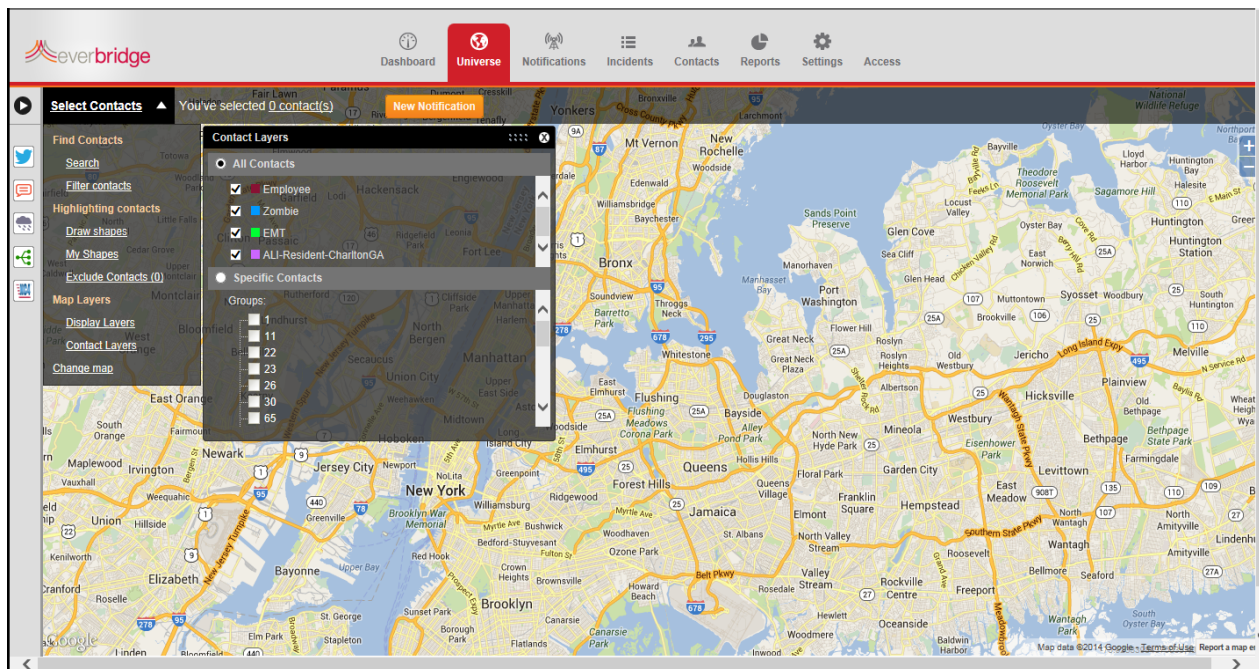
The following table lists the Display Layers user messages and their possible root causes.

Message	Possible Root Cause
The file you have uploaded is not a shapefile. Please check it and try again.	The file is not empty, but contains invalid content (for example, an image file, more than one folder, the folder name contains a space, and so forth).
Please enter a value with a valid expression.	The file extension is not .ZIP.
The file you have uploaded is empty.	The files does not contain the expected objects.
One or more circle shapes in this file are missing a center or a radius.	One or more circle polygons in the file are missing information needed to draw the shape.
File size exceeded 100 MB.	The file is larger than 100 MB.



## Contact Layers

Contact layers are potential message recipients. The contact layers depend on your organization. The contact layer is uploaded, or the contact records are added manually or through the Member Portal by citizens who opt-in for notification. Any record with a geo-coded address is loaded in the contact layer. See also the procedure *To manage dynamic groups* on page 19.



### To select contacts with contact layers

- 1 From the Universe tab, select Contact Layers from the Select Contacts drop-down list.
  - The Contact Layers dialog is displayed. The items you see in the Contacts Layer dialog are determined by the permissions granted to your role in the organization, as well as how the contacts in your organization have been configured. The names of the items are custom to your organization.
- 2 You can select contact layers in All Contacts or Specific Contacts.
  - All Contacts—The All Contacts section of contact layers lists all of the contact types defined by your organization. If the check box is selected, the contacts from a contact layer are indicated on the map by the color preceding the contact layer name. Clearing the check box removes the contacts from the map.
  - Specific Contacts—Specific Contacts have contact layers for groups and dynamic groups. Administrators assign contacts to groups by name and maintain the list of contacts who are in a particular group. Administrators create dynamic groups by configuring filters that automatically select contacts with certain characteristics. If groups are nested, select the + sign next to the desired group name.
- 3 Select the desired Contact Layer check boxes.

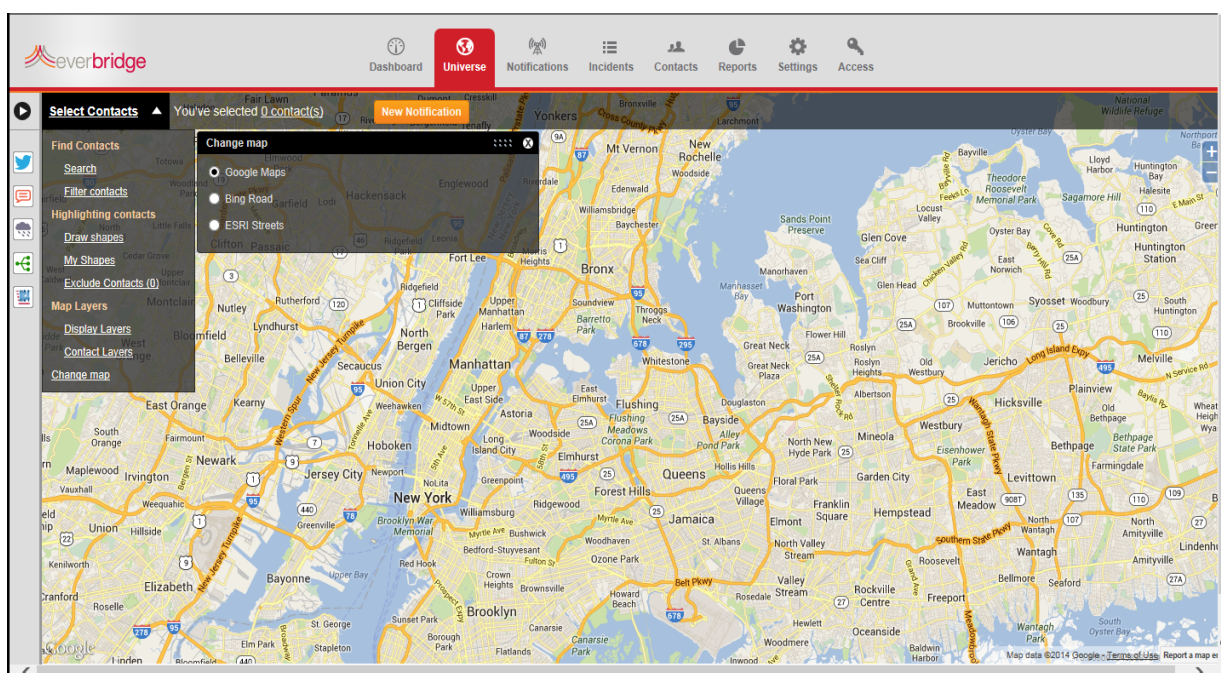


The contacts in the selected contact layers are displayed on the map. (Clear the check boxes to remove contact layers.)

- 4 Use shapes to select contacts for the notification once you have the contact layers displayed.

## Change Map

You can change the type of map from the default by choosing a different radio button. You will see a Custom Map offered if it has been uploaded and published.





## Adding and Sending a Notification

You have all the fields you need on one page to send a notification. As needed, use the scroll bar to see the parts of the page on which you want to work.

There are a few ways to send a notification. One way is from the Notifications tab. Click New Notification. The New Notification page appears. (To send a notification from the Notifications tab, see the procedure *To create a notification from the Notifications tab* on page 85.) If you are going to send a notification to contacts from the map, you do so from the Universe tab. From the Universe tab, click New Notification. A New Notification panel appears, identical to the one from the Notifications tab.

The following procedure shows an example of sending a notification from the Universe tab. Suppose there is a chemical spill at the Wall Street location. You need to notify the Hazardous Materials handling team to go to that location. Anyone around that location needs to evacuate, and the Fire Wardens need to monitor the evacuation. Managers and any individuals need to be notified as well.





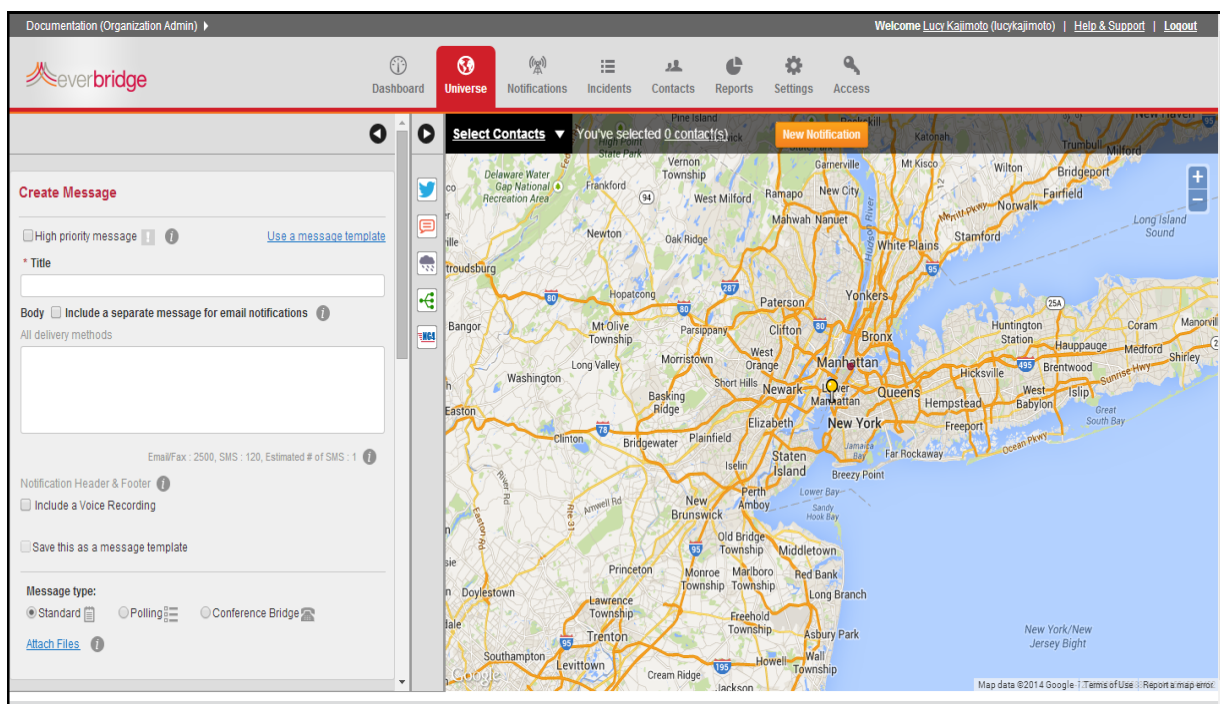


## To add a notification from the Universe tab

For detailed descriptions of each field on the New Notification page and if those fields are required, see *Notifications Fields* on page 83 in *Chapter 4, Notifications*. On-screen, required fields have a red asterisk (\*) next to their labels.

- 1 From the Universe tab, select New Notification.

A notification appears from which you can fill in the fields and send immediately (or save the notification as a template).



- 2 Select the check box if this is a high-priority message; that is, an emergency situation. (Leave the check box clear if this is a low priority, or standard message.) High-priority notifications are placed higher in the outbound queue before any non-priority notifications.
- 3 Type a title for this notification. For example, **Chemical spill at Wall St.** If this message is sent by email, fax, or SMS, the title becomes the subject line of the email.
- 4 Add your message.
  - a If you have an existing message template, perform the following steps. Otherwise, skip to step 4b.
    - Click the link: Use a message template.
    - Select the desired message and click OK.
    - The Title and Body fields are pre-filled with information from the message template.
    - Optionally, edit the Title and Body text to make it unique for this situation.
    - Optionally, save this information as its own Message Template by selecting the check box: Save as message template.



- b Optionally, select the check box: Include a separate message for email notification. Use this option to create a separate message for email delivery methods. When selected:
    - You can customize the email with text formatting, images, color, tables, and so forth. The custom email is delivered to Mobile Member users as an attachment.
    - Text entered in the Body will only go to non-email delivery methods (for example, SMS text, fax, or pager) and will be used for text-to-speech conversion.For details, see *Including a Separate Message for Email Notification* on page 89 in Chapter 4, *Notifications*.
  - c Optionally, select the check box: Include a Voice Recording. Then, select the desired Voice radio button, as needed. Otherwise, skip to step 5.
    - If you want to use an Everbridge recorder, see the procedure *To add a new voice message template using a computer microphone* on page 116 in Chapter 4, *Notifications*.
    - If you want to use a telephone, see the procedure *To add a new voice message template using a land line telephone* on page 117 in Chapter 4, *Notifications*.
    - If you have a recorded voice message, you can upload the file. See the procedure *To upload a message* on page 118 in Chapter 4, *Notifications*.
- 5 Add a message by typing it in the Body text box.

The message will be used for email and text devices, and the text-to-speech engine will read it for voice delivery to phones.
- 6 Select a Message Type:
  - Standard—A Standard message is simply a notification of the text.
  - Polling—In a Polling message, add options to solicit responses to the message. The contact can choose one of the options, and you will see them in Broadcast Results.

**NOTE:** For your Polling message type, in Settings, know that the Voice Mail Preference and Confirm panes are replaced with the SMS Call Back pane. In this pane, when the SMS Call Back check box is selected, the SMS recipients are provided with a number to call and make their polling selection. If the SMS Call Back check box is clear, the SMS recipients are presented with a menu to select their polling choice directly from the device.

- **Quota**—If you select Polling, then select the check box: Use quotas, you can add options for contacts to respond to a list of choices and then you send a Follow-Up with the results. For example, if you need five volunteers to work the graveyard shift on Saturday and Sunday, you can type **Need volunteers to work graveyard on Saturday** with #needed as **5** and **Need volunteers to work graveyard on Sunday** with #needed as **5**. Broadcast Results show which contacts are willing to work. You can then send a Follow-Up letting everyone know who is working (the first five contacts to volunteer).
- **Conference Bridge**—In a Conference notification, the message is to join a conference call. This could be an emergency where contacts need to discuss the situation immediately. Or, it might be a convenient way to pull everyone together



for the weekly status meeting. Contacts who are reached by phone can push a button to connect to the conference bridge. Contacts who receive a text message will see the instructions for joining the call.

Documentation (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe Notifications Incidents Contacts Reports Settings Access

**Create Message**

☐ High priority message | [Use a message template](#)

**Title**  
Chemical Spill at Wall St

**Body** ☐ Include a separate message for email notifications | **All delivery methods**  
There is a chemical spill at our Wall St location. HazMat team report there. All others evacuate until you receive all clear message.

Email/Fax : 2342, SMS : 82, Estimated # of SMS : 2

**Notification Header & Footer**  
☐ Include a Voice Recording  
☐ Save this as a message template

**Message type:**  
☒ Standard ☐ Polling ☐ Conference Bridge

[Attach Files](#)

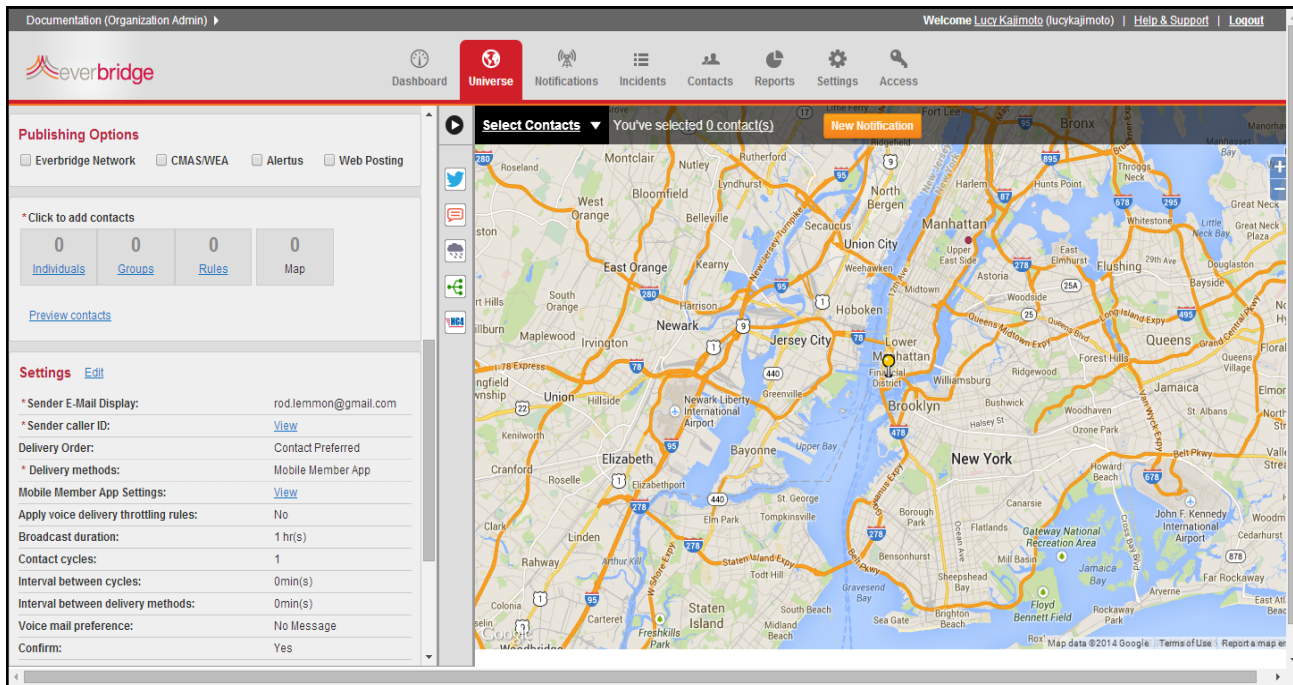
Select Contacts | You've selected 0 contact(s) | New Notification

Map showing locations in the New York City area, including Manhattan, Bronx, and Brooklyn.

- 7 Attach up to 5 files, as needed. (If this message will be delivered via email, fax, or Everbridge Mobile Member, you can optionally attach files to it by selecting the Attach files link and selecting your files.)
- 8 Select your Publishing Options.  
For more information, see *step 7* on page 87 of the procedure *To create a notification from the Notifications tab*.



- 9 Scroll down the left-hand pane to see the remaining sections of the New Notification form.

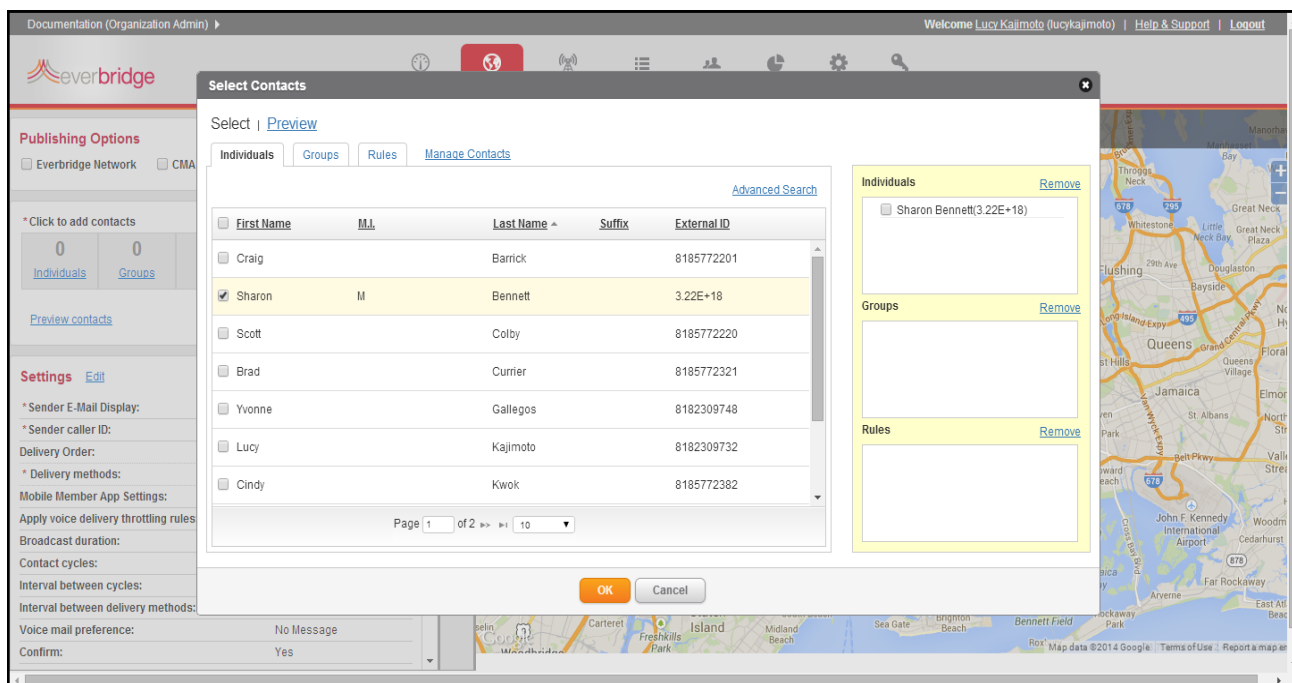


- 10 Select contacts in two ways:
- a On one page, by Individuals, Groups, or Rules.
    - If you are an Account Administrator using the Account's Notifications tab, you can select the organization name from the drop-down list. This allows you to select contacts across organizations.
    - To select individuals, click link: Individuals. The Select Contacts page appears.
    - One by one, select the check box of the desired contact names. In the example, one individual senior manager will be selected.

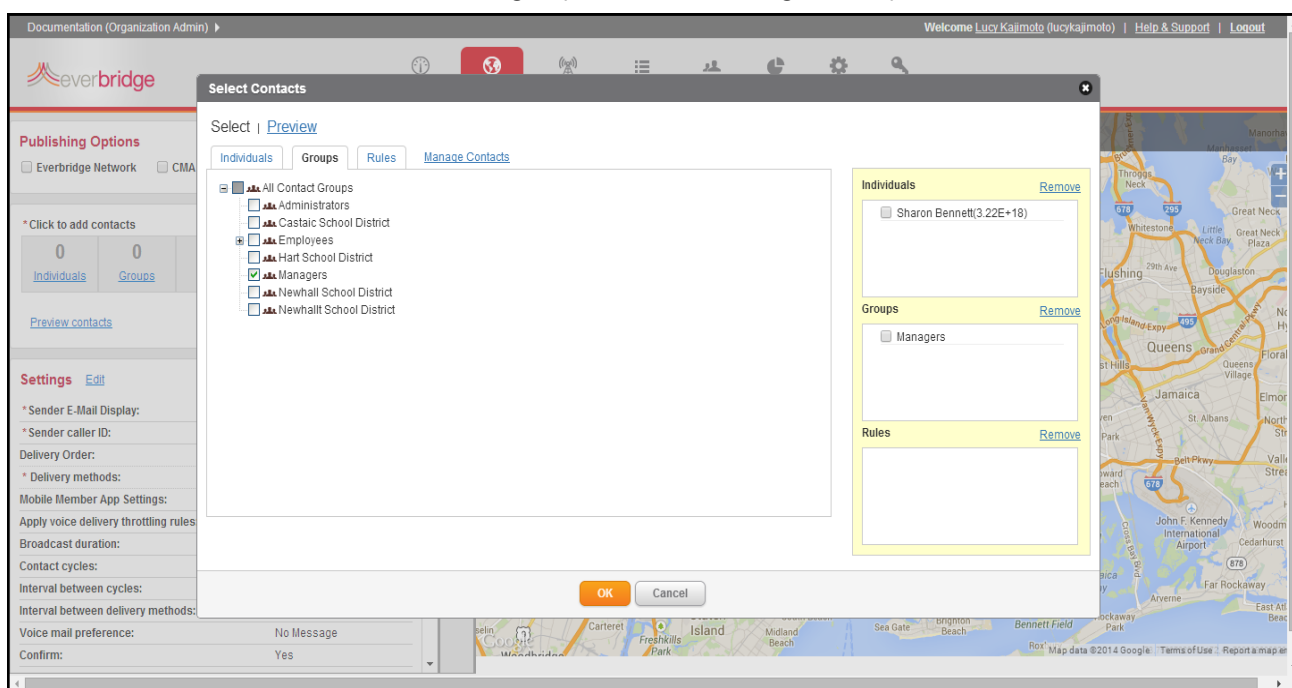




The individuals are listed in the right-hand panel.

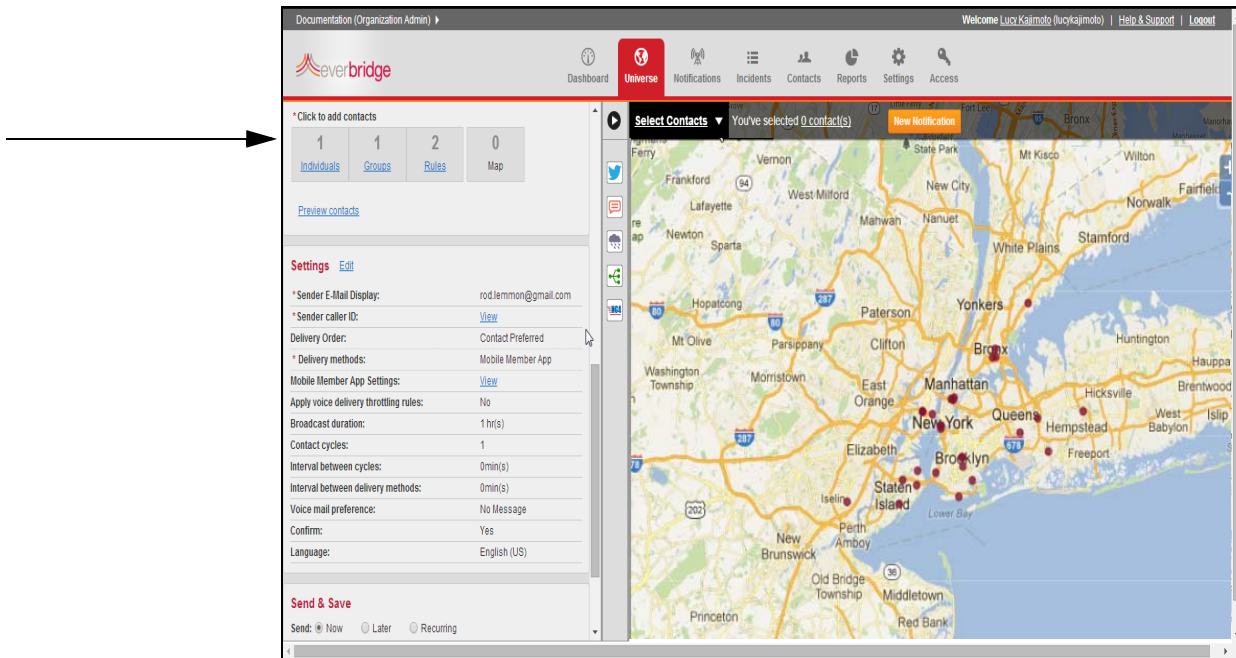


- To select groups, from the Select Contacts page, select the Groups sub-tab. (To learn about Groups, see *Groups* on page 143.) In the example, one group, the Managers, will be selected.  
The Select Groups page appears.
- One by one, select the desired group names (which could be nested).  
The groups are listed in the right-hand panel.





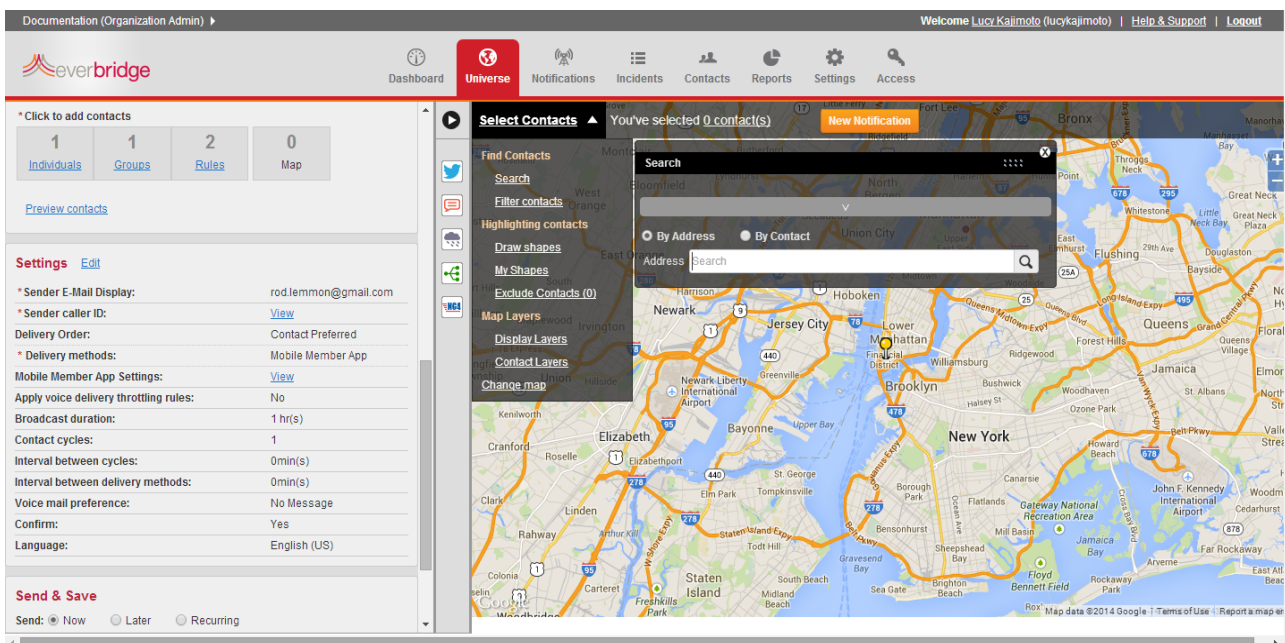
- To select Rules, from the Select Contacts page, select the Rules sub-tab. (To learn about Rules, see *Rules* on page 151.)  
The Select Rules page appears.
- Select the rules (advanced search filters) you want to use in this template. In the example, two rules, Fire Wardens and the Hazardous Materials team, will be selected.  
The rules are listed in the right-hand panel.
- Click OK.  
You will see the count for each contact category.



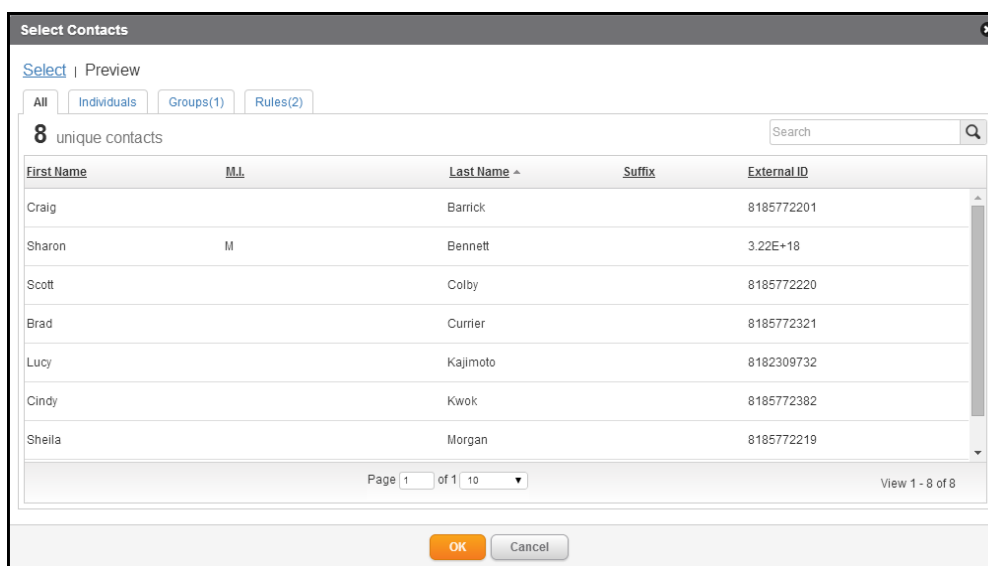
- b** From a different page, by Map location, to add contacts who have an address near the location of the notification.
- There are many ways to use the map to select contacts. See *Understanding Shapes* on page 59. For example, you can draw a circle around the location that includes the contacts in the database who have an address in the circle.
- To start drawing the circle, from the Select Contacts menu, select Search, enter an address that will be the center of the circle. In this example, it is the address of the Wall Street location. Click the Search (magnifying glass) icon to the right of the address you just typed.



- Set a marker on the map with a radius (in this example, a 1000 foot radius), and click Show on Map. Then, click the Close (X) button in the Search overlay and the Up arrow next to Select Contacts to close that menu.



- 11 Optionally, select the link: Preview contacts. From the All sub-tab, you see the names of all the contacts you have selected, whether as Individuals, from a group, a rule, and/or from the map. Or, select Preview from the individual sub-tabs to see the specific contacts you have selected.



- 12 Review your Settings.  
These are the default values set by your Organization Administrators.



- a If a setting has a View link, hover the mouse over the link to see the details.

The screenshot shows the Everbridge Universe interface. On the left, the 'Settings' panel is open for a contact. The 'Delivery Order' setting has a 'View' link. A tooltip is displayed over this link, showing details: 'Request location: Yes', 'Request image: Yes', 'Request additional information: Yes', and 'Enable Sharing Options: Yes'. The background features a map of New York City.

- b If you have permission, you can edit the Settings.
- Make your changes, as needed.
  - Scroll to see all the settings.
  - As an example, select the Confirm check box to give the contacts the ability to confirm receipt of the message.
  - Click Hide to close the settings.

The screenshot shows the Everbridge Universe interface with the 'Settings' panel expanded. The 'Sender E-Mail Display' is set to 'rod.lemmon@gmail.com'. The 'Sender caller ID' is set to 'United States 8185001258'. The 'Delivery Order' is set to 'Contact Preferred'. The 'Delivery methods' are set to 'Please select...'. The 'Mobile Member App Settings' section is visible, showing a 'Confirm' checkbox that is currently unchecked. The background features a map of New York City.





- 13 In the Send & Save section, select one of the following Send commands.

The screenshot shows the Everbridge web interface for configuring a notification. The top navigation bar includes links for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings, and Access. The left sidebar contains the following sections:

- Interval between delivery methods:** 0min(s)
- Interval between delivery methods:** 0 min(s)
- Voice mail preference:** No Message
- Confirm:** Yes
- Language:** English (US)

The main area displays a map of New York City with a 'Select Contacts' dropdown and a 'New Notification' button. The 'Send & Save' section at the bottom has the following options:

- Send:** ☒ Now ☐ Later ☐ Recurring
- Or -** ☐ Save as a notification template
- ☐ Include as part of an event

Buttons for 'Send' and 'Cancel' are located at the bottom of the 'Send & Save' section.

- **Now**—to send the notification immediately.
  - **Later**—to schedule a later date and time to send the notification. When the Date field appears, click the Calendar icon to select the desired date and time (using 24-hour format).
  - **Recurring**—to configure the schedule and how often to send the notification. Click the Calendar icon to select the date ranges and click the Clock icon to select the time.
  - **Save as a Notification Template**—to save this notification as a template so it is ready for you to send when you need it. You can save it in a Category to make it quicker for you to find when you want to broadcast it. Select from the drop-down list or type a new category name directly into the text box.
- 14 Optionally, select the check box: Include as part of an event.  
This way, if you associate the notification with an event, you can view the event and see the history of the notifications, all in one place. Select from the drop-down list or type a new event name directly into the text box. See *Events* on page 79.
- 15 Depending on your Send & Save selection, click the Send button, the Schedule button, or the Save button, as appropriate.  
After the notification is sent, you can monitor the results. See *Active/History* on page 119.



# Notifications

This chapter provides information about Notifications. The Notifications tab begins with displaying the status of notifications in the Active/History sub-tab. Other sub-tabs include: Schedules, Notification Templates, and Message Templates. You can add a New Notification from this tab (as well as from the Universe tab).

**The following topics are covered:**

- ◇ *Overview of Notifications*
- ◇ *New Notifications*
- ◇ *Active/History*
- ◇ *Notification Templates*
- ◇ *Scheduled / Recurring Notifications*
- ◇ *Message Templates*



# Overview of Notifications

From the Notifications tab, you can send a notification or see the history of notifications previously sent. By selecting other sub-tabs on the page, you can view and maintain scheduled notifications, notification templates, and message templates.

The screenshot shows the Everbridge Notifications interface. At the top, there's a navigation bar with tabs: Dashboard, Universe, Notifications (active), Incidents, Contacts, Reports, Settings, and Access. Below the navigation bar, there's a sub-header for Notifications with a 'New Notification' button and filters for 'In Progress' (0), 'Last 7 days' (0), and 'Last 30 days' (0). The main content area shows a table of notifications with columns: Status, Published, Title, Event Name, Sent On, Sent By, Sent To, and Charts. The table lists six notifications, including a chemical spill alert and a test notification.

Status	Published	Title	Event Name	Sent On	Sent By	Sent To	Charts
✓ Actions	P	Test of Web posting #1		2013-04-26 09:36:14 PDT	Susan Stoba	6	
✓ Actions		Test of confirm check box set to No and VM is MQ		2013-04-24 12:04:56 PDT	Susan Stoba	2	
✓ Actions		Test of confirm check box set to Yes and VM is MQ		2013-04-24 12:01:31 PDT	Susan Stoba	2	
✓ Actions		Chemical spill at Wall St		2013-04-24 11:25:46 PDT	Lucy Kajimoto	7	
✓ Actions	P	test		2013-04-23 14:36:00 PDT	Susan Stoba	6	
✓ Actions		test of long event name	oooooooooooooooooooo	2013-04-23 13:02:48 PDT	Susan Stoba	6	

A message could be about an emergency situation, such as a hurricane warning, or a serious problem such as “there is a wildfire west of the I-295.” The message could also be just a regular part of doing business, such as “We need three people to work second shift.”

## Notifications

A *notification* is the sending of a message to a contact using the notification settings and delivery methods specified in the contact record.

You can configure the notification to require confirmation from the contacts to record when they have confirmed receipt of the message. Once the person confirms receipt of the message, the application stops sending the message to this contact.

Optionally, you can send a notification with a high priority status. A high priority message is dispatched by the system before messages without the high priority status. By default, the application uses a different greeting for voice messages when you send a notification with high priority.

When the notification is sent, it is an *active* notification. When you configure the notification, you set a duration. The notification ends when it has reached the end of the duration.





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

**NOTE:** Unlike the Organization level, at the Account level, the Account Administrator:

- 1 Can send notifications across organizations.
- 2 Cannot add a schedule/recurring notification.
- 3 Has no publishing options and no map from which to select contacts.

## Events

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

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

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

From the Active/History sub-tab, you can see the notifications that are part of a specific event. Clicking the Event Name from the Active/History sub-tab launches the Event Analysis page.

**NOTE:** Only Account Administrators and Organization Administrators can access the Event Analysis page.



Susan Stoba Test Organization (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe **Notifications** Incidents Contacts Reports Settings Access

Notifications <sup>2</sup>

[New Notification](#)

In Progress 0 Last 7 days 0 Last 30 days 0

Active/History Scheduled Notification Templates Message Templates

Status	Published	Title	Event Name	Sent On	Sent By	Sent To	Charts
✓	P	<a href="#">Title of message of the web postaroonie</a>		2013-04-22 18:12:39 PDT	Susan Stoba	Published Only	Published Only
✓	P	<a href="#">Alertus Desktop Test</a>		2013-04-22 16:55:12 PDT	Susan Stoba	Published Only	Published Only
✓ Actions	P	<a href="#">Test again of Alertus</a>		2013-04-22 11:06:24 PDT	Susan Stoba	6	
✓ Actions		Earthquake Preparedness Training in Santa Clarita, CA		2013-04-22 07:56:08 PDT	Lucy Kajimoto	9	
✓ Actions		<a href="#">Chemical spill at Wall St</a>		2013-04-22 07:41:50 PDT	Lucy Kajimoto	2	
✓ Actions	P	<a href="#">Test 3 of Alertus</a>		2013-04-22 06:18:00 PDT	Susan Stoba	6	
✓ Actions	P	<a href="#">Test 2 of Alertus</a>		2013-04-22 06:15:42 PDT	Susan Stoba	6	

To view an event report, go to the Reports tab and select Event Analysis. From the drop-down list, select the event name and click View Report. The Event Summary for the named event is displayed.

Susan Stoba Test Organization (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe Notifications Incidents Contacts **Reports** Settings Access

Reports > Event Analysis <sup>2</sup>

**Event Analysis**

Event name: Flood Warning  
Notification ID(s): 4402341485424, 4402341485423

Total Confirmation Status

No results yet

Notification ID	Start Date	Message Title	Contacts	Confirmation Status	Confirmations by Method
4402341485424	2013-03-26 11:24:31 PDT	Flood Warning - Cancelled	4		No results yet

See *Event Analysis* on page 208 for further details about the Event Summary.



---

# New Notifications

You have all the fields you need on one page to send a notification. As needed, use the scroll bar to see the parts of the page on which you want to work.

- 1 Add the message.
- 2 Select the contacts who are to receive the notification.
- 3 Configure the settings.
- 4 Send the notification.

There are a few ways to send a notification.

- ◇ One way is from the Notifications tab. Click New Notification. The New Notification page appears. See the procedure *To create a notification from the Notifications tab* on page 85.
- ◇ The other way is from the Universe tab. If you are going to send a notification to contacts from the map, from the Universe tab, click New Notification. A New Notification panel appears, identical to the one from the Notifications tab. See the procedure *To add a notification from the Universe tab* on page 67.



Documentation (Organization Admin)

Welcome Lucy Kaiimoto (lucykaiimoto) | Help & Support | Logout

DashboardUniverseNotificationsIncidentsContactsReportsSettingsAccess

Notifications > New Notification ?

Create Message

☐ High priority message ⓘ ⓘ [Use a message template](#)

\* Title

Body ☐ Include a separate message for email notifications ⓘ  
All delivery methods

Email/Fax : 2500, SMS : 120, Estimated # of SMS : 1 ⓘ

Notification Header & Footer ⓘ  
☐ Include a Voice Recording  
☐ Save this as a message template

Message type:  
☒ Standard ⓘ ☐ Polling ⓘ ☐ Conference Bridge ⓘ  
[Attach Files](#) ⓘ

Publishing Options

☐ Everbridge Network ☐ CMAS/WEA ☐ Alertus ☐ Web Posting

Select Contacts ☐ Use notification escalation ⓘ

\* Click to add contacts

0  
Individuals

0  
Groups

0  
Rules

0  
Map

[Preview contacts](#)

Settings ⓘ

\* Sender E-Mail Display: rod.lemmon@gmail.com

\* Sender caller ID: [View](#)

Delivery Order: Contact Preferred

\* Delivery methods: Mobile Member App

Mobile Member App Settings: [View](#)

Apply voice delivery throttling rules: No

Broadcast duration: 1 hr(s)

Contact cycles: 1

Interval between cycles: 0min(s)

Interval between delivery methods: 0min(s)

Voice mail preference: No Message

Confirm: Yes

Language: English (US)

Send & Save

Send: ☒ Now ☐ Later ☐ Recurring

- Or - ☐ Save as a notification template

☐ Include as part of an event

SendCancel

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## Notifications Fields

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

Field Name	Required?	Description
High priority message	N	Select this check box if this is an emergency situation. Otherwise, leave clear this check box to indicate it is a low priority, standard message.
Use a message template	N	<p>Message Templates allow you to view messages that are ready to be used, or view existing messages that are partially built and can be edited to be used.</p> <p>To use a message template, click the link. Then, select the desired message template title and click OK.</p>
Title	Y	Type a name for this notification. The title is included in messages sent to email, fax, and SMS delivery methods.
Body	N	<ol style="list-style-type: none"><li>1 If you have already added and saved a message for this type of notification, you can select it from the Message Template list. See <i>Message Templates</i> on page 130.</li><li>2 You can add the message by typing it in the Body text box. The message will be used for text delivery to email and SMS devices, and a text-to-speech engine will read it for voice delivery to phones.</li></ol>
Include a separate message for email notification	N	<p>Use this option to create a separate message for email delivery methods. When selected:</p> <ul style="list-style-type: none"><li>♦ You can customize the email with text formatting features such as images, color, text sizes, tables, and so forth. See the procedure <i>To include a separate message for email notification</i> on page 89.</li><li>♦ If you use this option, the text entered in the other fields will only be sent to plain text delivery methods (for example, SMS text, fax, or pager) and will be used for text-to-speech conversion.</li></ul>
Include a Voice Recording	N	<p>Select the check box, then select the desired radio button:</p> <ul style="list-style-type: none"><li>♦ Use Everbridge recorder (see the procedure <i>To add a new voice message template using a computer microphone</i> on page 116).</li><li>♦ Use a telephone (see the procedure <i>To add a new voice message template using a land line telephone</i> on page 117).</li><li>♦ Upload a file (see the procedure <i>To upload a message</i> on page 118).</li></ul>
Save this as a message template	N	Select this check box to reuse this message for future notifications. The application will save the content in Title, Message Body, and Voice Recording as a message template.
Message type	N	<p>Select from:</p> <ul style="list-style-type: none"><li>♦ Standard—a basic alert message.</li><li>♦ Polling/Quota—includes options for contacts to respond to a list of choices; you see the answer in the Broadcast Results.</li><li>♦ Conference Bridge—the contact is able to connect to a conference bridge upon receiving the notification.</li></ul> <p><b>NOTE:</b> The Conference Bridge message type is not available for messages sent from the Account level.</p>
Attach Files	N	Attach files to the message if the notification is sent via email, fax, or Everbridge Mobile Member. You can attach up to 5 files.



Field Name	Required?	Description
Publishing Options		Select the desired check boxes:
	N	♦ Everbridge Network—Share the notification with the organizations you have indicated. Optionally, you can use a shape to specify the impacted area to your network.
	Y	♦ CMAS/WEA—Send a smaller version of your message via the IPAWS WEA hosted by FEMA.
	N	♦ Alertus—Relay important emergency alerts through Alertus, an Everbridge Partner providing desktop alerts, alert beacons, and digital signage
	N	♦ Web Posting—Send the message to partner systems or client-side web sites, you can provide one or more URLs. Optionally, provide a corresponding username and password for each URL.
		<b>NOTE:</b> Publishing Options are not available for notifications send from the Account level.
Select Contacts	N	Optionally, select the check box: Use notification escalation.  For more information about Escalations, see <i>Notification Escalations</i> on page 109.
Click to add contacts	Y	A contact is a recipient of the notification. You can select contacts by Individual, Group (contacts in a group), and/or Rules. (This is a targeted population within your database. It is dynamic in nature. The rule is stored, not the results.). At the Organization level, you can also select contacts by map location.  <b>NOTE:</b> Selecting contacts from a map is not available for notifications sent from the Account level.  For more information about Contacts, see <i>Contacts</i> on page 133.
Settings	Y (Sender email display, Sender caller ID, and Delivery methods)	The default settings (configured via the Settings tab) are displayed. If you have permission, then you can change the Settings values for the notification by clicking Edit, changing the desired settings, and clicking Hide.  <b>NOTE:</b> If you are sending notifications from the Account, ensure you have the same delivery methods in the Account and the Organization. For example, if the Account has three organizations, and the Account Administrator wants to send a notification across the organizations to "Email Address 1", each organization must have an "Email Address 1" delivery method.  For more information about Settings, see <i>Organization Settings</i> on page 333.



Field Name	Required?	Description
Send & Save	N N Y (Start Date) N	<p>Select the desired Send option:</p> <ul style="list-style-type: none"> <li>Now—To send immediately.</li> <li>Later—to schedule the notification to automatically launch at a later date and time. Click the Calendar icon, then select the future date and time for the notification.</li> <li>Recurring—to configure how often to send the notification. Click the Calendar icon to select the date ranges and click the Clock icon to select the time.</li> <li>Save as a Notification Template—to save this notification as a template so it is ready for you to send when you need it. You can save it in a Category to make it quicker for you to find when you want to send it. Select one of your previous Category names from the drop-down list or enter a new category name directly into the text box.</li> </ul> <p>Unlike the Organization level, at the Account level, Account Administrators cannot select Schedule or Recurring.</p>
Include as part of an event	N	Select this check box if yes. Then, select an existing event from the drop-down list or type an event name in the text box. See also <i>Events</i> on page 79.
Send (Schedule or Save)	Y	Click the Send (Schedule or Save) button to complete the process.

### To create a notification from the Notifications tab

The following procedure shows an example of sending a notification from the Notifications tab. Suppose there is a chemical spill at the Wall Street location. You need to notify the Hazardous Materials handling team to go to that location. Anyone around that location needs to evacuate, and the Fire Wardens need to monitor the evacuation. Managers and any individuals need to be notified as well.

For detailed descriptions of each field on the New Notification page and if those fields are required, see *Notifications Fields* on page 83. On-screen, required fields have a red asterisk (\*) next to their labels.

- From the Notifications tab (or Universe tab), select New Notification.  
A blank notification appears from which you can fill in the fields. You can send the notification immediately, schedule the notification for a later date, schedule a recurring notification, or save the notification as a template.
- Select the check box if this is a high-priority message; that is, an emergency situation. (Leave the check box clear if this is a low priority, or standard message.)  
High-priority notifications are placed higher in the outbound queue before any non-priority notifications.
- Type a title for this notification. For example, **Chemical spill at Wall St.**  
If this message is sent by email, fax, or SMS, the title becomes the subject line of the email.
- Add your message.
  - If you have an existing message template, perform the following steps. Otherwise, skip to step 4b.
    - Click the link: Use a message template.
    - Select the desired message and click OK.



- The Title and Body fields are pre-filled with information from the message template.
  - Edit the Title and Body text to make it unique for this situation.
  - Optionally, save this information as its own Message Template by selecting the check box: Save as message template.
- b** Optionally, select the check box: Include a separate message for email notification. Use this option to create a separate message for email delivery methods. When selected:
- You can customize the email with text formatting features such as images, color, tables, and so forth. The custom email is delivered to Mobile Member users as an attachment.
  - Text entered in the other fields will only go to plain-text delivery methods (for example, SMS text, fax, or pager) and will be used for text-to-speech conversion.

**NOTE:** You are required to enter at least one character in the Body field even if you want to send only Custom Email content to email address delivery methods.

See *To include a separate message for email notification* on page 89 and then return here. Otherwise, skip to step 4c.

- c** Optionally, select the check box: Include a Voice Recording. Then, select the desired Voice radio button, as needed. Otherwise, skip to step 4c.
- If you have a recorded voice message, you can upload the file. See the procedure *To upload a message* on page 118 and then return here.
  - If you want to use an Everbridge recorder, see the procedure *To add a new voice message template using a computer microphone* on page 116 and then return here.
  - If you want to use a telephone, see the procedure *To add a new voice message template using a land line telephone* on page 117 and then return here.
- d** Add a message by typing it in the Body text box.  
The message will be used for email and text devices, and the text-to-speech engine will read it for voice delivery to phones.

**5** Select a Message Type:

- Standard—A Standard message is simply a notification of the message.
- Polling—In a Polling message, add options to solicit responses to the message. The contact can choose one of the options, and you will see them in Broadcast Results.

Message type:

☐ Standard ☒ Polling ☐ Conference Bridge

\* Text Response ☐ Use Quotas

1

[Add Another](#)





**NOTE:** For your Polling message type, in Settings, know that the Voice Mail Preference and Confirm panes are replaced with the SMS Call Back pane. In this pane, when the SMS Call Back check box is selected, the SMS recipients are provided with a number to call and make their polling selection. If the SMS Call Back check box is clear, the SMS recipients are presented with a menu to select their polling choice directly from the device.

- **Quota**—If you select Polling, then select the check box: Use quotas, you can add options for contacts to respond to a list of choices and then you send a Follow-Up with the results. For example, if you need five volunteers to work the graveyard shift on Saturday and Sunday, you can type **Need volunteers to work graveyard on Saturday** with #needed as **5** and **Need volunteers to work graveyard on Sunday** with #needed as **5**. Broadcast Results show which contacts are willing to work. You can then send a Follow-Up letting everyone know who is working (perhaps the first five contacts to volunteer). You can also stop the quota.
- **Conference Bridge**—In a Conference notification, the message is to join a conference call. This could be an emergency where contacts need to discuss the situation immediately. Or, it might be a convenient way to pull everyone together for the weekly status meeting. Contacts who are reached by phone can push a button to connect to the conference bridge. Contacts who receive a text message will see the instructions for joining the call.

- 6 Attach up to 5 files, as needed. (If this message will be delivered by means of email, fax, or Everbridge Mobile Member, you can optionally attach files to it by selecting the Attach files link and selecting your files.)
- 7 Select your desired Publishing Options.

**TIP:** When sending to any publishing option, the following fields on the Notification form must be populated:

- ♦ The Body field must contain text or include a voice file.
  - ♦ Select Contacts must have at least one contact from the database.
  - ♦ Delivery Methods and Sender Information cannot be empty.
- **Everbridge Network**—This notification will be published to the organizations you have indicated. Optionally, you can use a shape to specify the impacted area to your network.
  - **CMAS/WEA**—For only Organization Administrators, Group Managers, and Dispatchers, the fields are as follows:
    - **Training Mode - Message will not be sent:** Select this check box to train your users on how to make selections. The message will not be sent to CMAS. If you are also sending to contacts, the message is sent to them.



- Private Key\* and Keystore Password\*: Type the required Client IPAWS passwords in these fields provided by FEMA. Typing in these passwords ensures that you cannot unintentionally access this page and send a message to CMAS.

**NOTE:** The FEMA-provided values in the drop-down lists cannot be modified.

- The following fields are displayed if your administrator has allowed you to make a selection:
  - Sender Agency Name\*: A single Sender Agency Name is displayed in read-only format. If there are multiple Sender Agency Names from which to choose, select one. For example, Police Dept or Sheriff's Office.
  - Event Name\*: Select the Event Name from the drop-down list.
  - Message Status\*: Select the Message Status from the drop-down list.
  - Message Category\*: Select the Message Category from the drop-down list.
  - Urgency\*: Select the Urgency from the drop-down list.
  - Severity\*: Select the Severity from the drop-down list.
  - Certainty\*: Select the Certainty from the drop-down list.
  - Expires in\*: Select the number of hours from the drop-down list in which the message expires.
  - Affected Region SAME Code(s)\*: A single SAME Code is displayed in read-only format. For multiple codes, select the desired codes, and separate them with a comma (for example, 406037,806037).
- Message to Public\*: Type the Message to the Public in the text box to be sent to WEA-capable mobile phones. Imposed by FEMA, you can use a maximum of 90 characters.

The Schedule and Save options are unavailable. When you click SEND, Everbridge sends the message to IPAWS. The message should pop up on all WEA-capable mobile phones in the broadcast area.

- Alertus—Provides a way for personnel to relay important emergency alerts through Alertus, an Everbridge Partner providing desktop alerts, alert beacons, and digital signage
- Web Posting—To initiate notifications to partner systems or client-side web sites, you can provide one or more URLs. Optionally, provide a corresponding username and password for each URL.

**NOTE:** Unlike the Organization level, at the Account level, Account Administrators do not have publishing options.

8 Scroll down the page to see the remaining sections of the New Notification form.

As you add or edit a message, you can optionally include a separate message for email notifications and use the other text fields for plain text delivery methods such as SMS text, fax, pager, or text-to-speech conversion.

- 1 Select the check box: Include a separate message for email notifications.  
The application displays a large text field below the existing text fields.
- 2 Scroll down until you see "Email only".





- 3 At any time, select the Expand link to expand the field. If you use the expanded version, then click Close when you are done.

- 4 Click in the Email Only field to activate the formatting tools in the toolbar above the field
- 5 Enter your email-only message.

**Considerations:**

- In Incident Templates, you can insert Information Variable tokens in your custom email content.
- The maximum amount of content that can be saved and/or used in the Custom Email field is 1 MB; the application does not currently display a character/content counter. You see a message only when you have more than 1 MB of content when you attempt to Save, Schedule, or Send the notification. (Image file sizes are excluded from the maximum Custom Email content size of 1 MB.)
- You can copy and paste items from an external source, such as a Web site or Microsoft Word.
  - Pasting content from an external source into the Custom Email field may not produce the same results as in Microsoft Office.
  - Not all content copied from Web pages may be preserved in the original format if the source uses custom or proprietary HTML tags.
  - Not all fonts, bullets, numbering, and indentation are supported when pasting content into the Custom Email field. See the supported fonts, bullets, numbering, and indentations at *Refer to the following examples*.



- Except for images, you can copy and paste content from Microsoft Word. To insert images in your custom email content, use the Insert Image tools to upload them. See the procedure *To upload an image into your custom email* on page 97.
- You can copy and paste a table from another source to the Email Only field, or you can use the Insert Table tool (see *About Custom Email Tables* on page 99).
- Alternatively, you can type your message directly into the Email Only field.
  - Only the US English keyboard was tested.
  - Inserting text by typing characters using native-language keyboards has not been fully tested.
- You must enter at least one character in the plain-text Body field even if you do not want to use those delivery methods.
  - Only the content of the plain-text field will appear in the Message Body element of all reports; the content of the Email Only field will be available on all reports in a separate field.
- Content created in the Email Only field may not be preserved in its original format when copied to a third-party application.

**NOTE:**

- 1 Ensure you select one or more Email Address delivery methods for this notification; otherwise, the Everbridge Suite application will not send the content of your "Email Only" field.
- 2 If your Organization uses a custom email header and footer (in Settings > Organization > Notification > Email Header and Footer), then do not include a header and footer in the Email Only field. The Everbridge Suite application will automatically insert your custom header and footer when sending the email message.

- 6 Click OK.  
The following is an example customized email.



Title: Severe Weather Warning!

**CRITICAL COMMUNICATION**

**Severe Weather Warning!**

**Evacuate now!**

There is a major storm expected tomorrow. The coastal area will be very dangerous with 10-foot swells at high tide resulting in significant flooding. The storm will produce winds of 40-50 mph.

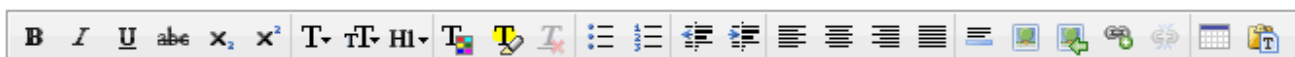
For emergency situations, go to higher ground or dial 911.





## Using the Custom Email Formatting Tools

The formatting tools are available from the Email Only field (in collapsed or expanded mode). Hover the mouse over each tool to see the bubble label. From left-to-right, each tool is described in the following procedures.



Although the toolbar appears similar to those in standard word processing applications, be aware that it offers minimal functionality compared to the formatting tools available in applications such as Microsoft Word. See *Considerations*: on page 90.

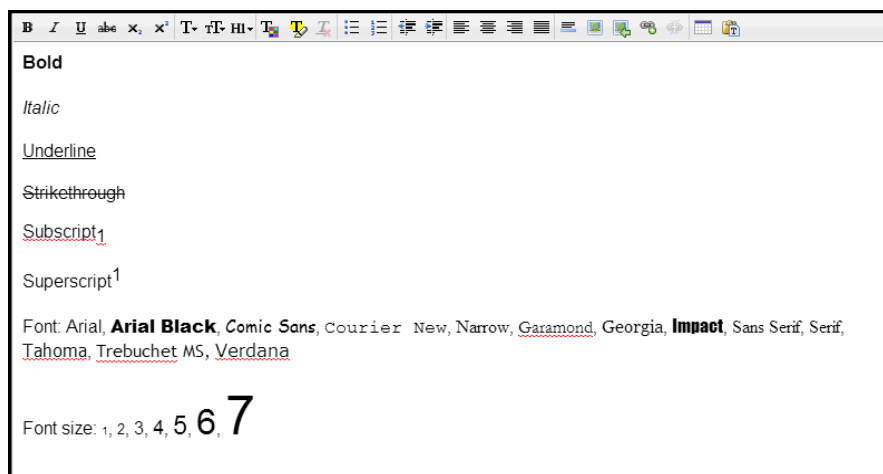
**NOTE:** Only Microsoft *Windows-based laptops* and an Apple *Mac mini* were used to test the Email Only formatting tools. The functionality of the rich text tools was not tested on tablets.

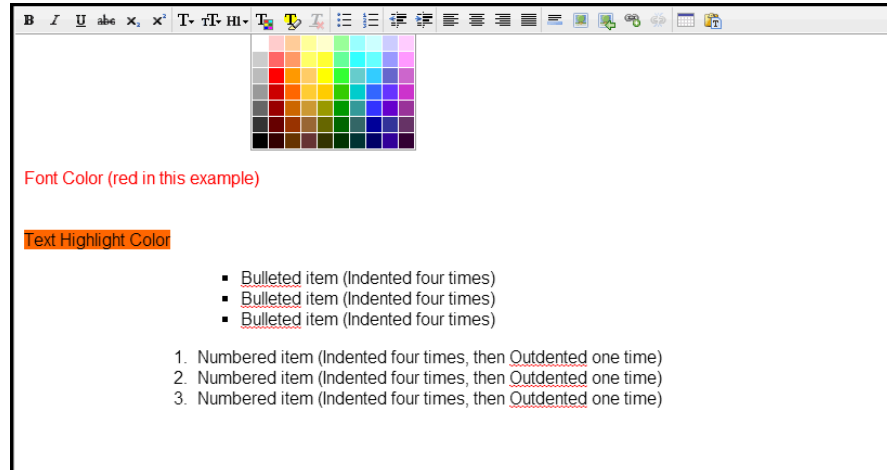
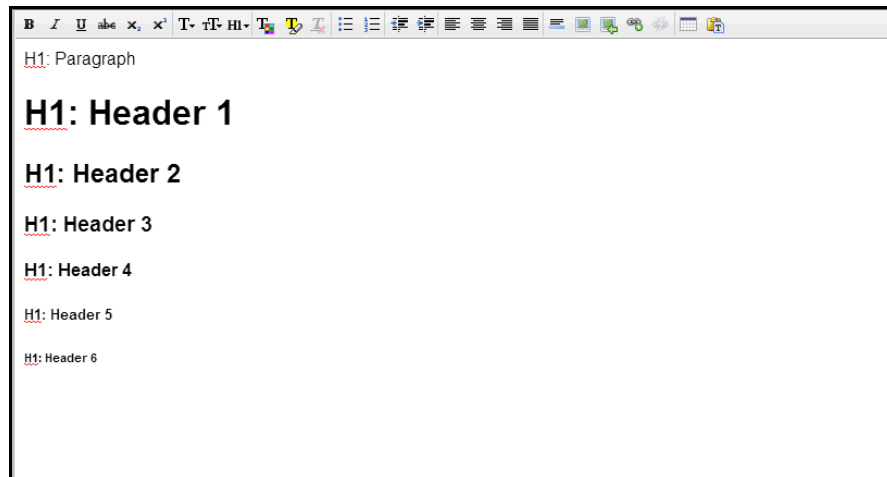
### To format your custom email

- 1 Type your text in the Custom Email window.

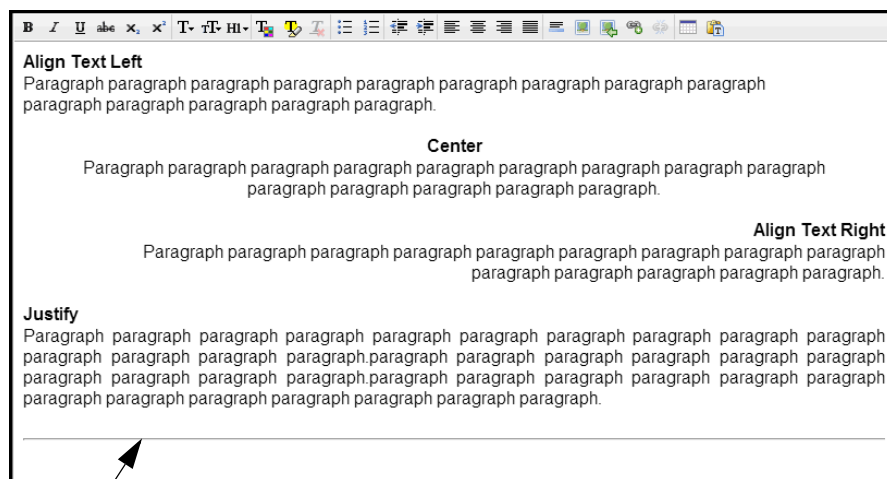
**NOTE:** Review the *Considerations*: on page 90.

- 2 Select the text and click the desired formatting tool.
- 3 Refer to the following examples.





**TIP:** Before sending your custom email notification, Everbridge recommends that you send a “test notification” to a small number of recipients to ensure that the notification looks and works the way you intended.



Insert Horizontal Rule

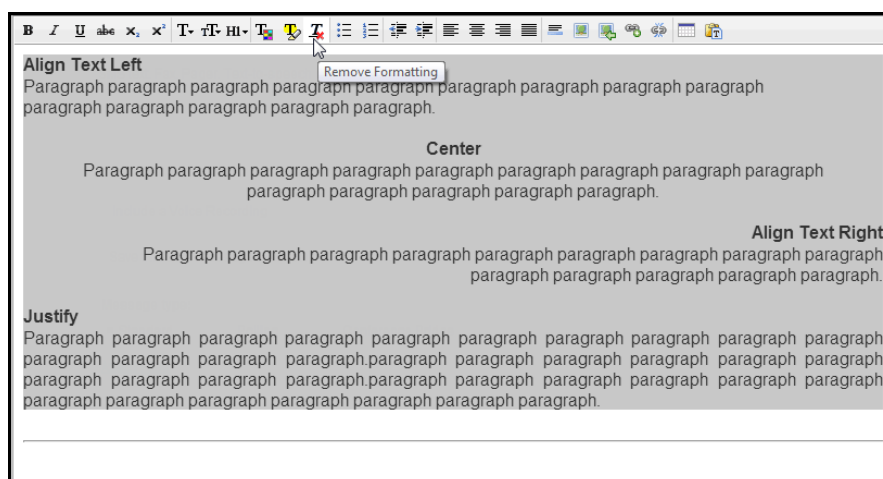




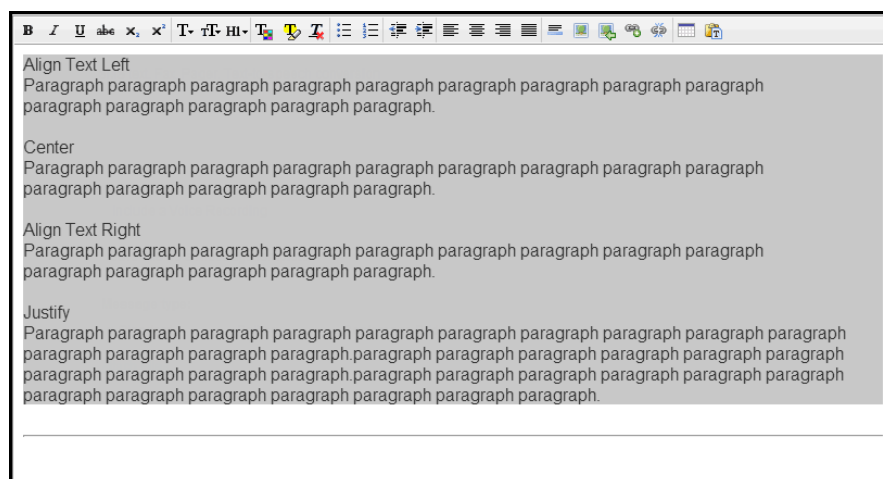
**NOTE:** Content created in the Email Only field might not be preserved when copied to a third-party application.

## To remove formatting from your custom email

- 1 Select the text from which you want to remove formatting.
- 2 Select the Remove Formatting tool.

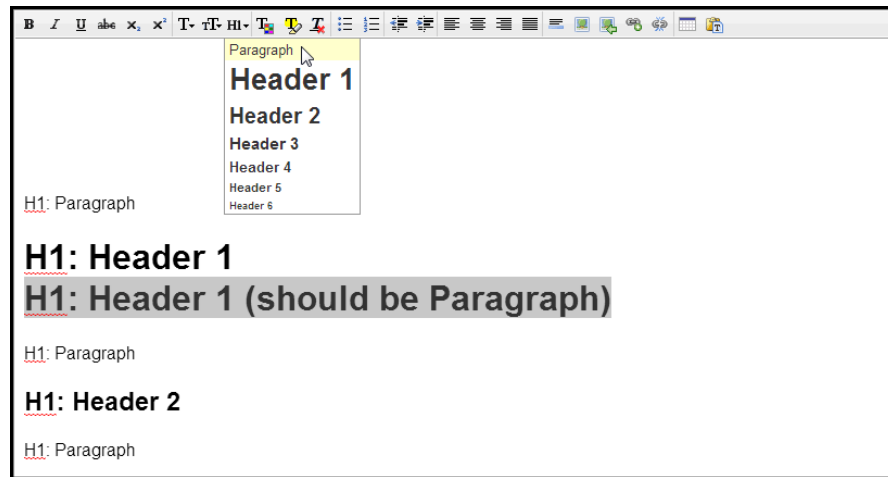


The formats return to the default custom email, Align Flush Left and Paragraph style.

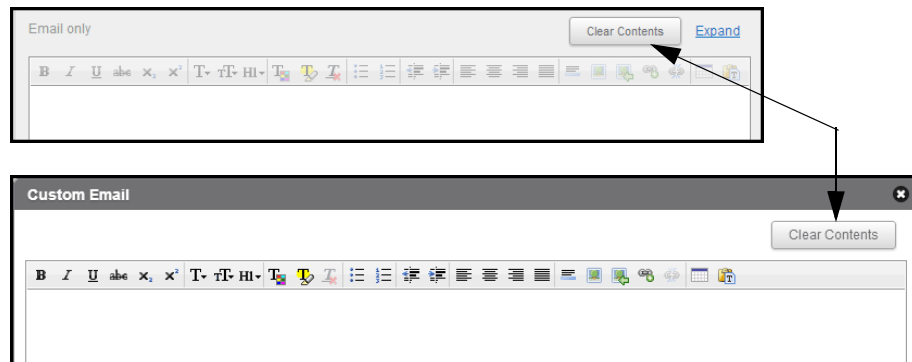




- 3 To change the H1 style, select the desired text, then click the H1 tool and select a different style.



- 4 To clear the contents of the custom email field, click the Clear Contents button located at the top right-hand side of the Email Only section of the notification or the expanded Custom Email dialog.

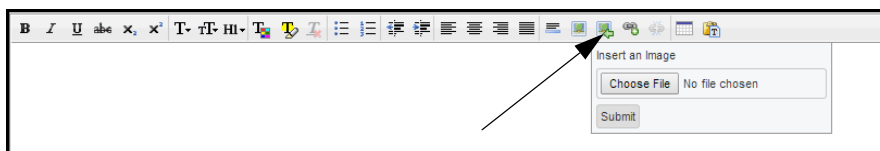
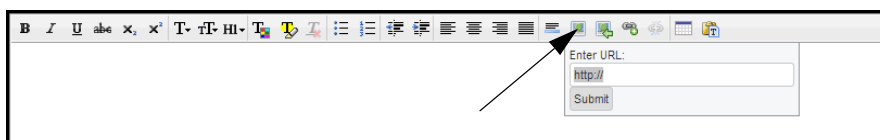


## To upload an image into your custom email

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

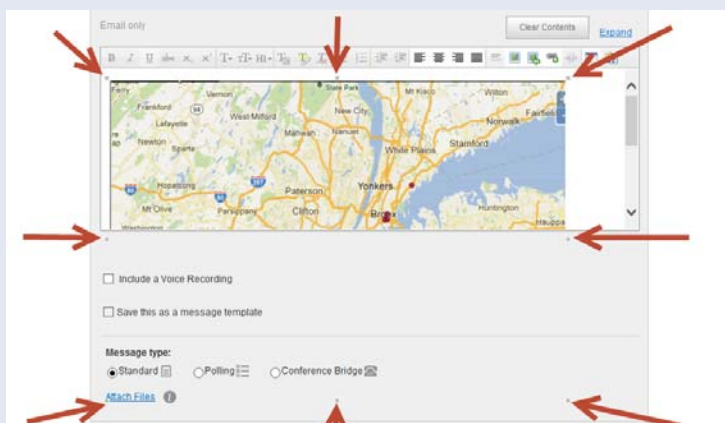
- ◇ By copying/pasting from an external source (except for Microsoft Word)
- ◇ By using one of the following Insert Image tools:
  - enter a URL address to retrieve an image from an Internet-accessible server
  - choose a file from your computing device

- 1 Select one of the Insert Image tools as described above.



- 2 Depending on the Insert Image tool you selected, do one of the following:
  - Entering a URL—Type or paste the URL, then click Submit.
  - Choosing a File—Select the Choose File (or Browse) button. From the Open dialog, navigate to the desired image and click Open. Click Submit.

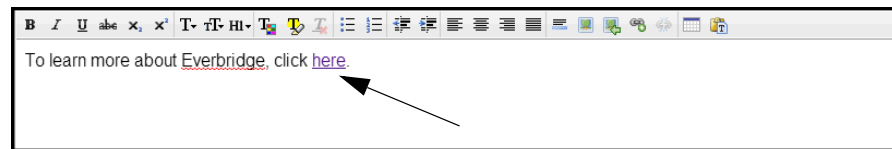
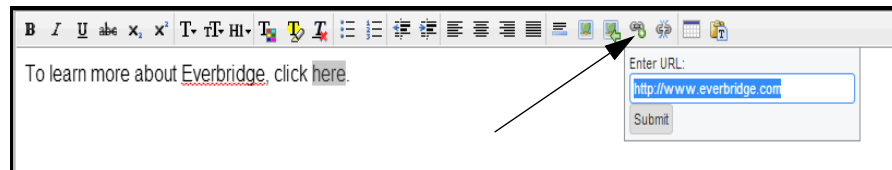
**NOTE:** The Internet Explorer browser may display images differently from other browsers. The image may display “handles” with which you can resize the image. For large images, the “handles” might be seen on the notification form page as illustrated in the image below.





### To insert a hyperlink into your custom email

- 1 Select the text to be associated with the hyperlink.
- 2 Click the Insert Hyperlink tool.
- 3 Enter the URL in the field and click Submit.  
Your text is displayed as a hyperlink.



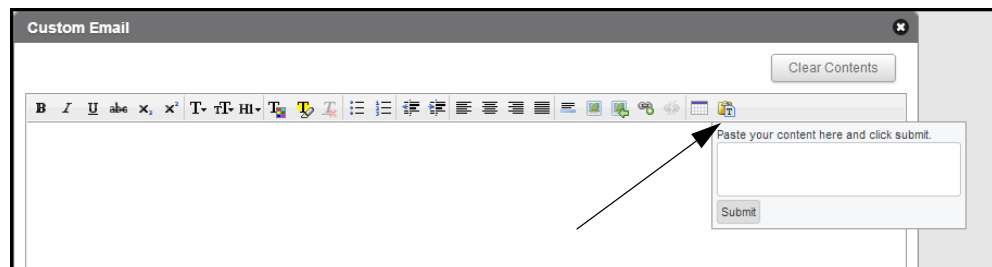
- 4 To remove a hyperlink, select the hyperlinked text and click the Remove Hyperlink tool.



### To copy content into your custom email without characters or formatting tags

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

- 1 Select the Paste as Text tool.
- 2 Copy the desired text from your external source.
- 3 Rather than pasting directly into the Custom Email window, paste the copied text into the Paste as Text tool.



- 4 Click Submit.



## About Custom Email Tables

The most straightforward way to enter a table in the Email Only field is to copy/paste from an external source such as Microsoft Word. Alternatively, insert a table directly into the Custom Email field.

### To copy/paste a table from an external source

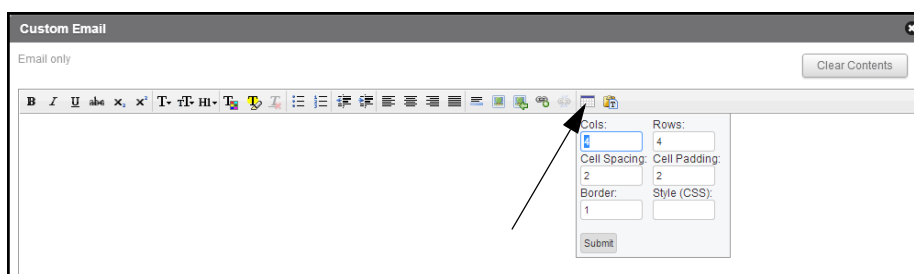
- 1 Place the mouse cursor where you want the table.
- 2 Copy/paste the entire table from an external source.

**NOTE:** From the external source, make sure that the table column widths are the desired size because they cannot be resized once the table is pasted into the Email Only field.

- 3 Optionally, use the formatting tools to change the content of the table (see *Using the Custom Email Formatting Tools* on page 93).

### To insert a table directly into the custom email

- 1 Place the mouse cursor where you want the table.
- 2 Select Insert Table.



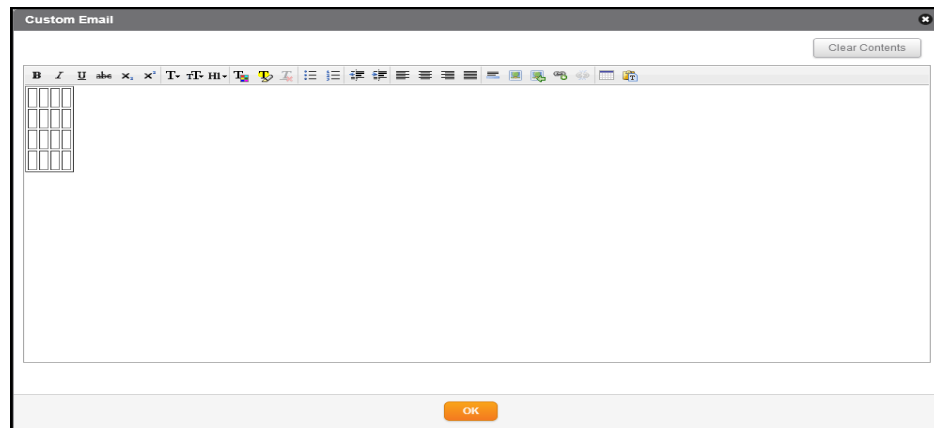
- 3 Review the following descriptions of the table fields.

Table Field	Description
Cols	The number of columns in the table.
Rows	The number of rows in the table.
Cell Spacing	The number of pixels around the table cells.
Cell Padding	The number of pixels between the cell wall and the cell content.
Border	The line width of the table border.
Style (CSS)	Optionally, paste CSS (Cascading Style Sheet) code into this field to change the look-and-feel of the table.

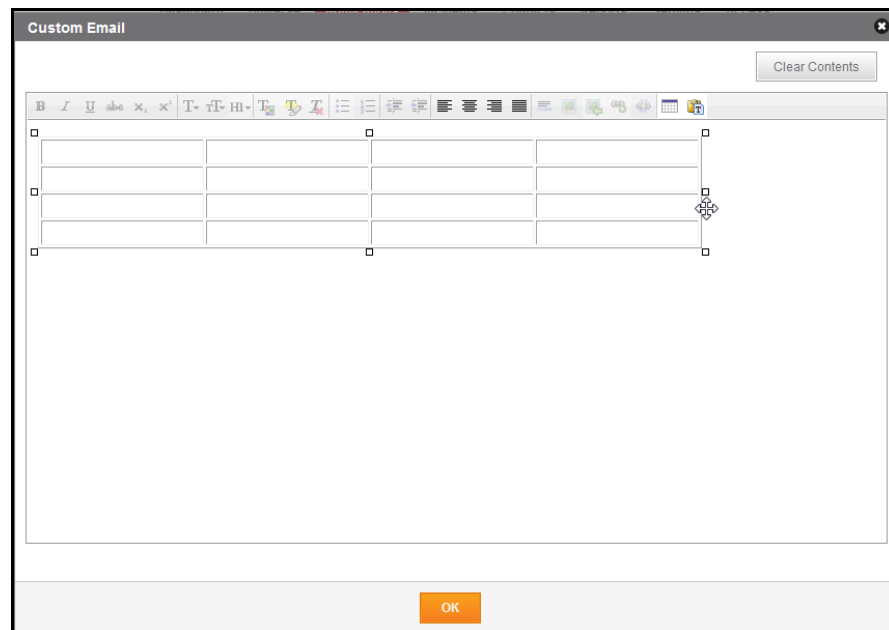
- 4 Configure your table as desired, then click Submit.



The default table is shown next.



- 5 Optionally, select an edge of the table and use the “handles” to resize the table.



- 6 Paste content or click in each cell and type the new content.  
You can also use the Left and Right arrows to move to the different cells. Using the TAB key does not advance to the next cell.



The following is an example table (2 columns and 2 rows) with content.

The screenshot shows a 'Custom Email' editor window. At the top right is a 'Clear Contents' button. Below the toolbar is a table with the following content:

Severe Weather	A Severe Thunderstorm Warning has been issued for your location. Please see local media for details.
Flood Warning	A Flood Warning has been issued for your area. Get to higher ground.

At the bottom right of the editor is an 'OK' button.

### To use CSS code to change the default appearance of a table

- 1 Place the mouse cursor where you want the table.
- 2 Select Insert Table.

The screenshot shows the 'Custom Email' editor with the 'Email only' tab selected. The 'Insert Table' icon in the toolbar is highlighted with a black arrow. A dialog box is open with the following settings:

Cols:	4	Rows:	4
Cell Spacing:	2	Cell Padding:	2
Border:	1	Style (CSS):	

A 'Submit' button is located at the bottom of the dialog box.



- 3 Copy/paste the CSS code into the Style (CSS) field.

Custom Email

Clear Contents

Example CSS code pasted into the Style (CSS) field:

```
border: 2px solid #000000;
padding: 0;
margin: 0 auto;
border-collapse: collapse;
font-size: 12px;
padding: 3px 3px 3px 8px;
color: #000000;
```

Cols: 4  
Rows: 4  
Cell Spacing: 2  
Cell Padding: 2  
Border: 1  
Style (CSS): border: 2px solid #000000

Submit

OK

**NOTE:** To edit the code, make changes to the CSS code, then copy/paste all of it again into the Style (CSS) field.

- 4 Click Submit.  
The new table is displayed with the CSS styles.

Custom Email

Clear Contents


OK

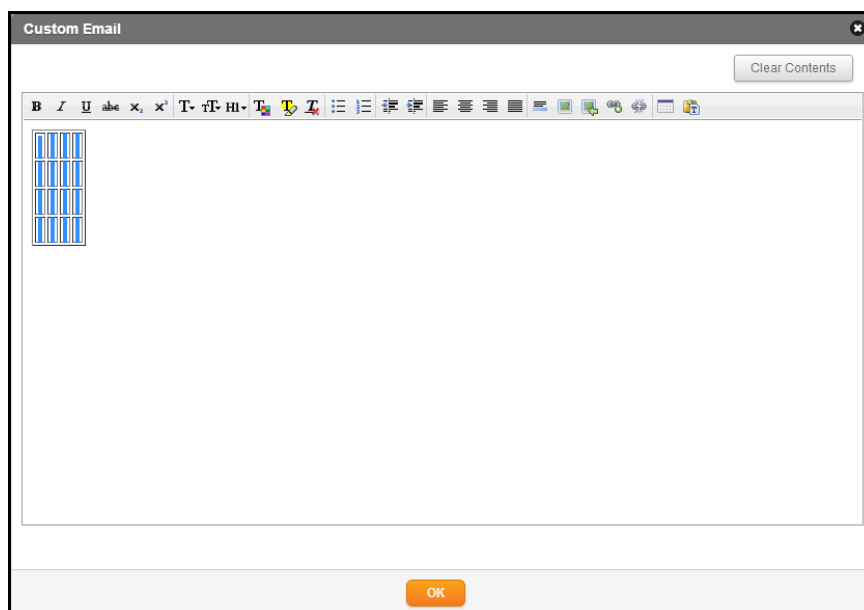
- 5 Go to *step 6* on page 100 to add content to your table.



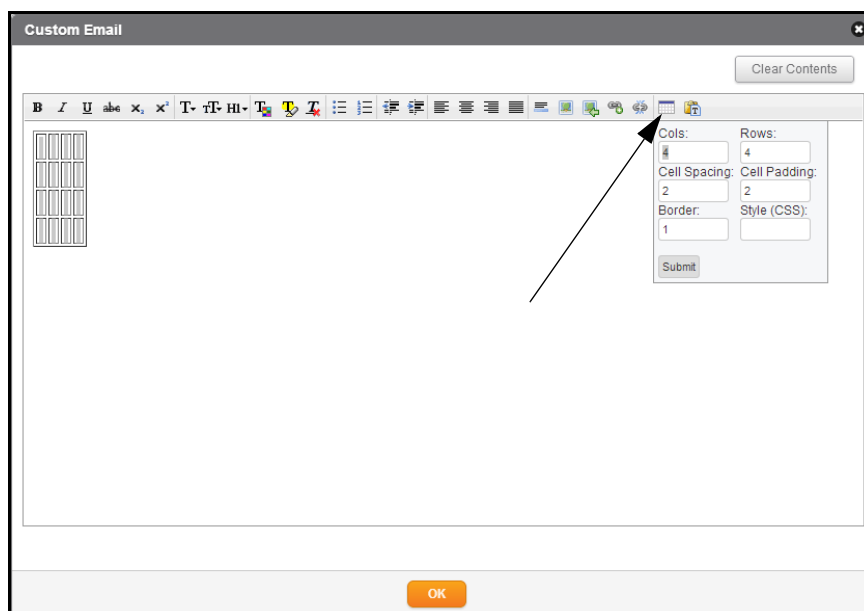
## To change the number of rows and/or columns in an empty custom email table

You can change the number of rows and/or columns of a table only when the table has no content in the cells.

- 1 Select the entire table.



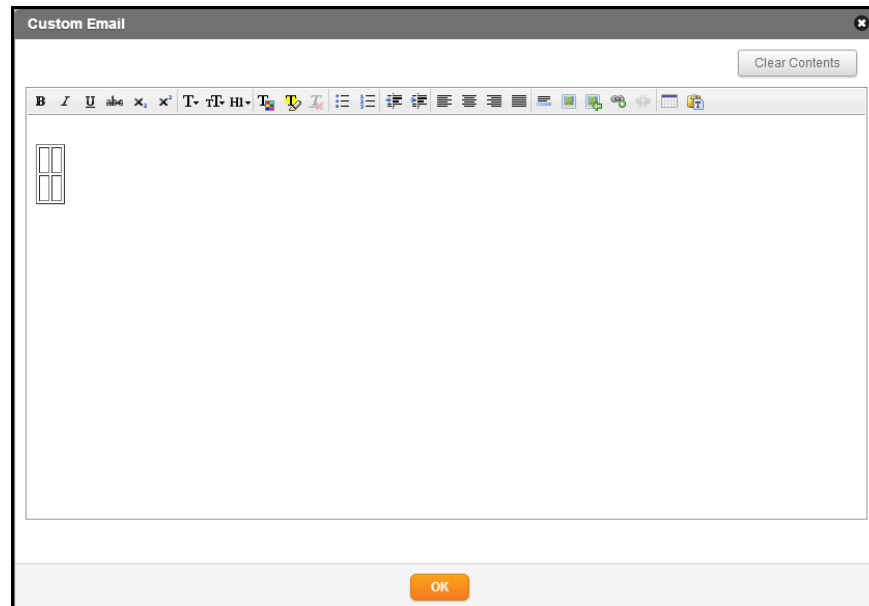
- 2 Select Insert Table.



- 3 Change the numbers in the corresponding table fields (refer to *step 3* on page 99) and click Submit.

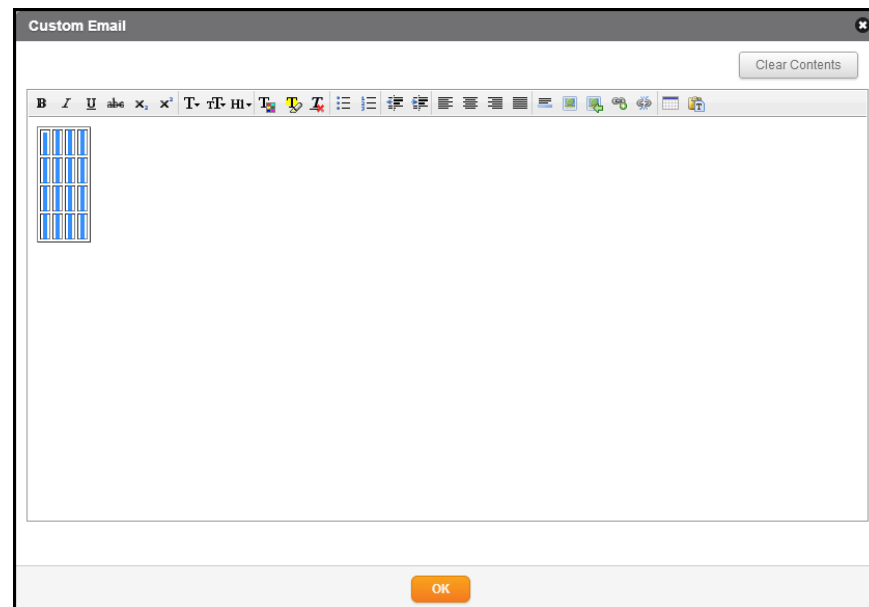


In the following example, the table now has 2 Cols and 2 Rows.



### To remove a table from the Email Only field

- 1 Select the entire table.



- 2 Click the Delete button on the keyboard.



## Contacts

- 1 Select contacts in two ways:
  - a On one page, by Individuals, Groups, or Rules. (To learn about Groups and Rules, see *Groups and Rules* on page 143.)
    - If you are an Account Administrator using the Account's Notifications tab, you can select the organization name from the drop-down list. This allows you to select contacts across organizations.
    - To select individuals, click the link: Individuals. The Select Contacts page appears.
    - One by one, select the check box of the desired contact names. The individuals are listed in the right-hand panel.

If selected contacts exceed 96, the first 96 contacts will be reached

[Attach Files](#) ⓘ

Select | [Preview](#)

[Individuals](#) [Groups](#) [Rules](#) [Manage Contacts](#) [Advanced Search](#)

<input type="checkbox"/> First Name	M.I.	Last Name	Suffix	External ID
<input checked="" type="checkbox"/> Craig		Barrick		8185772201
<input type="checkbox"/> Sharon	M	Bennett		3.22E+18
<input type="checkbox"/> Scott		Colby		8185772220
<input type="checkbox"/> Brad		Currier		8185772321
<input type="checkbox"/> Yvonne		Gallegos		8182309748
<input type="checkbox"/> Lucy		Kajimoto		8182309732
<input type="checkbox"/> Cindy		Kwok		8185772382

Page 1 of 2 >> 10

[Remove](#)

[Remove](#)

[Remove](#)

OK Cancel

Interval between delivery methods: 0min(s)

Confirm: Yes

- To select groups, from the Select Contacts page, select the Groups sub-tab. (To learn about Groups, see *Groups* on page 143.) The Select Groups page appears.
- One by one, select the desired group names (which could be nested). The groups are listed in the right-hand panel.
- To select Rules, from the Select Contacts page, select the Rules sub-tab. (To learn about Rules, see *Rules* on page 151.) The Select Rules page appears.
- Select the rules (advanced search filters) you want to use in this template. The rules are listed in the right-hand panel.
- Click OK.



You will see the count for each contact category.

**Select Contacts** ☐ Use notification escalation ?

\* Click to add contacts

1 <a href="#">Individuals</a>	2 <a href="#">Groups</a>	2 <a href="#">Rules</a>	0 <a href="#">Map</a>	<a href="#">Preview contacts</a>
----------------------------------	-----------------------------	----------------------------	--------------------------	----------------------------------

**Settings** [Edit](#)

\* Sender E-Mail Display: rod.lemmon@gmail.com

\* Sender caller ID: [View](#)

Delivery Order: Contact Preferred

\* Delivery methods: Mobile Member App

Mobile Member App Settings: [View](#)

Apply voice delivery throttling rules: No

Broadcast duration: 1 hr(s)

Contact cycles: 1

Interval between cycles: 0min(s)

Interval between delivery methods: 0min(s)

Confirm: Yes

Language: English (US)

**Send & Save**

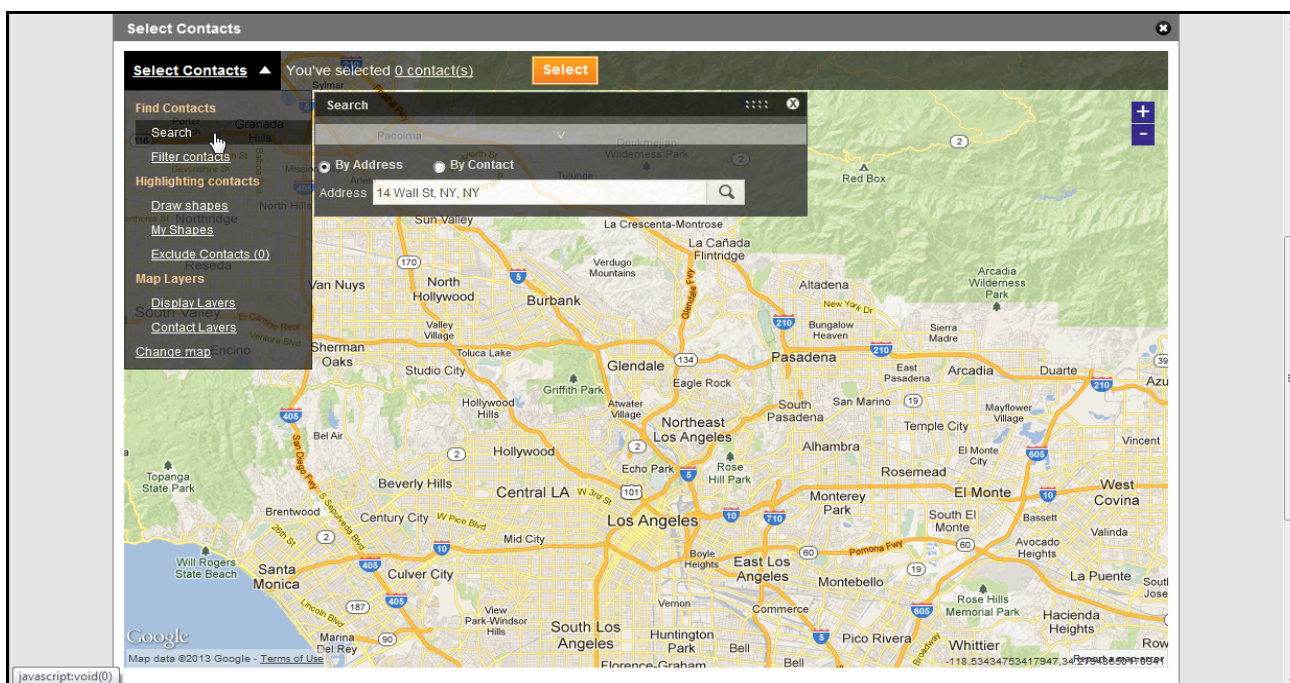
Send: ☒ Now ☐ Later ☐ Recurring

- Or - ☐ Save as a notification template

- b From a different page in the Universe tab, by Map location, to add contacts who have an address near the location of the notification.
- There are many ways to use the map to select contacts. See *Understanding Shapes* on page 59 in *Chapter 3, Universe*. For example, you can draw a circle around the location that includes the contacts in the database who have an address in the circle.



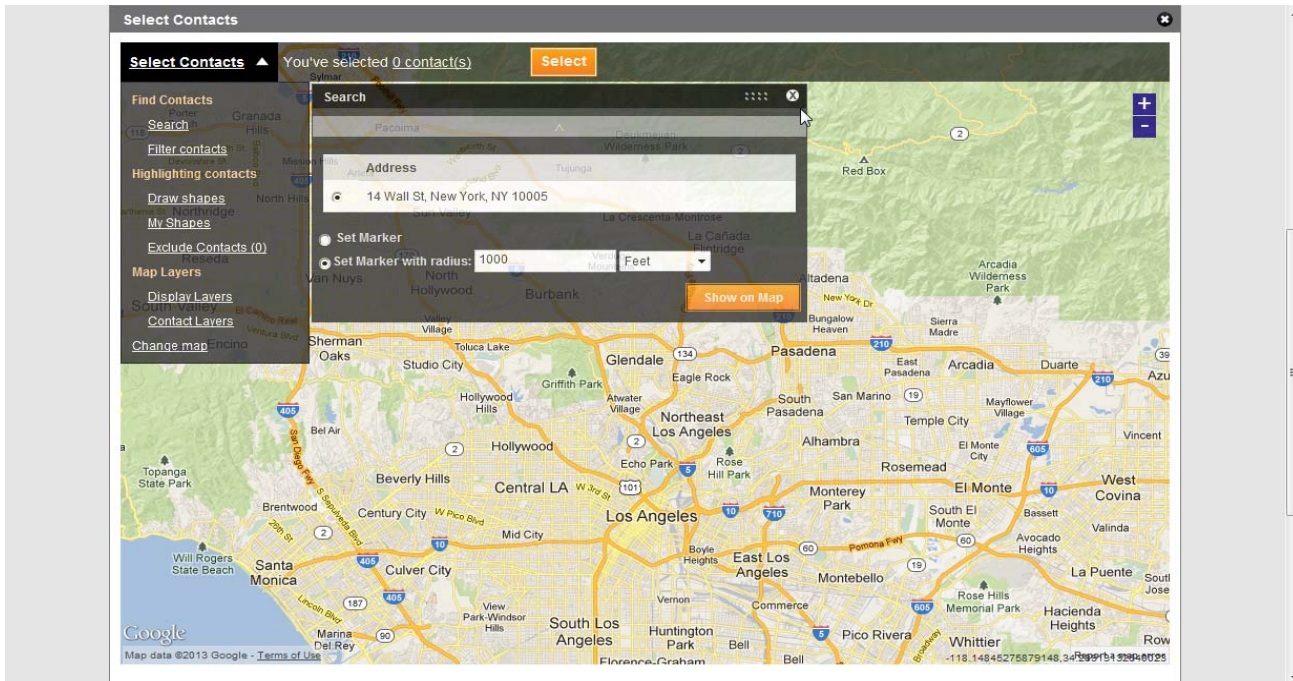
- To start drawing the circle, from the Select Contacts menu, select Search, and type an address that will be the center of the circle. In this example, it is the address of the Wall Street location.



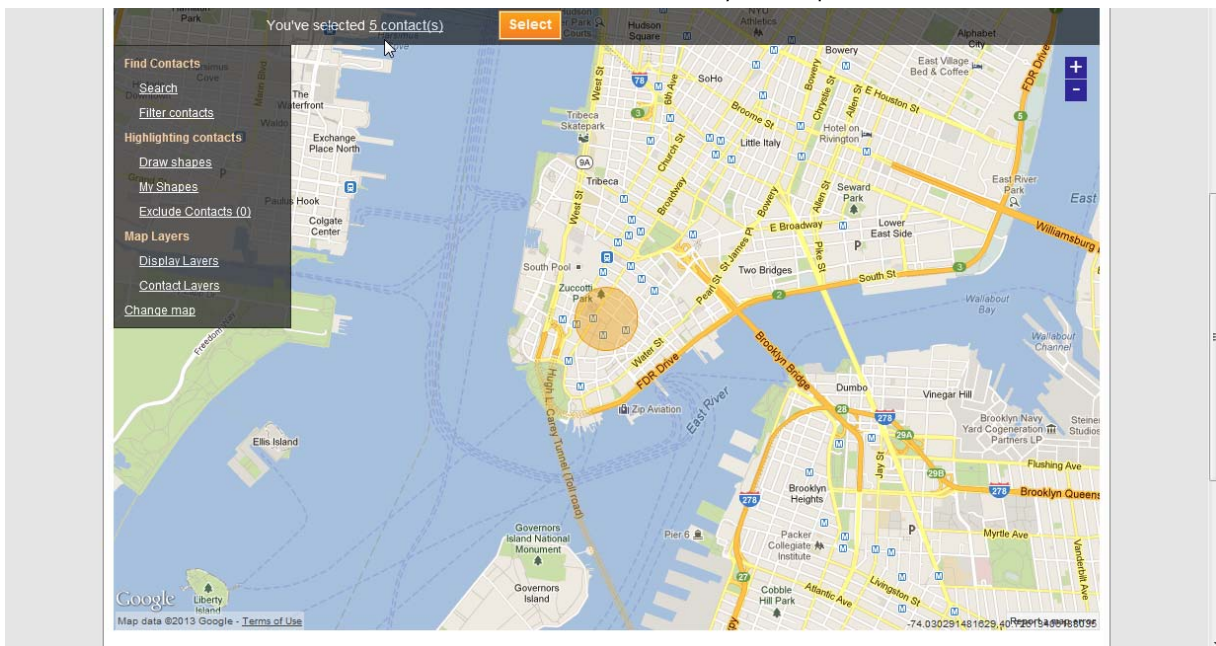
- Click the Search (magnifying glass) icon to the right of the address you just typed.
- Select the radio button of the address you want to use.



- Set a marker on the map with a radius (in this example, a 1000 foot radius), and click Show on map.



- Close the Search overlay by clicking the Close (X) button.
- Notice that contacts within your shape have been selected.



- Click Select to return to the Notification page.





- 2 Optionally, select the Preview tab. From the All sub-tab, you see the names of all the contacts you have selected, whether as Individuals, from a group, a rule, and/or from the map. Or, select Preview from the individual sub-tabs to see the specific contacts you have selected.

Select Contacts

Select | Preview

All Individuals Groups(2) Rules(2)

8 unique contacts

First Name	M.I.	Last Name	Suffix	External ID
Craig		Barrick		8185772201
Sharon	M	Bennett		3.22E+18
Scott		Colby		8185772220
Brad		Currier		8185772321
Lucy		Kajimoto		8182309732
Cindy		Kwok		8185772382
Sheila		Morgan		8185772219

Page 1 of 1 10 View 1 - 8 of 8

OK Cancel

## Notification Escalations

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

### To use notification escalations

- 1 If available and needed, optionally, select the check box: **Use notification escalation**. Otherwise, skip to *Settings* on page 112.

**NOTE:** Escalations can be used in the following message types: Standard, Polling, and Conference.

The same message type and settings are used for all escalations in a notification. For example, each escalation level has the same Broadcast Duration. It is feasible that the broadcast duration of the escalations could overlap.



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

**Select Contacts** ☒ Use notification escalation [?](#)

Total Responses Needed

**Primary Contacts** [✎](#)

\* Click to add contacts

0 Individuals	0 Groups	0 Rules	0 Map	<a href="#">Preview contacts</a>
------------------	-------------	------------	----------	----------------------------------

**Escalation Level 1** [✎](#)

[🕒](#) If I don't have 0 response(s) in  [minutes](#) ESCALATE to:

\* Click to add contacts

0 Individuals	0 Groups	0 Rules	0 Map	<a href="#">Preview contacts</a>
------------------	-------------	------------	----------	----------------------------------

[Add another Escalation Level](#)

- 2 In Total Responses Needed, type the number, which cannot be 0 (zero), of required responses needed from the primary contacts before escalating the notification beyond the Primary Contacts. This is a required field.
- 3 Use the steps outlined in *Contacts* on page 105 to enter your Primary Contacts.
- 4 In the Escalation Level 1 pane, type the specified time you want to escalate to another set of contacts if you do not have the expected number of responses from the Primary Contact level. For Minutes, the minimum allowed number is "1" and the maximum is "1440". For Hours, the minimum allowed is "1" and the maximum is "24". Then, select Minutes or Hours from the drop-down list.

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

- 5 Use the steps outlined in *Contacts* on page 105 to enter your Escalation Level contacts.





- 6 Click the link: Add another Escalation Level to add another escalation. When you click the link, the number of the Escalation Level increments by one. You can add as many escalations as you need. Repeat step 4 through step 6, as needed.

The screenshot shows the 'Select Contacts' form with the 'Use notification escalation' checkbox checked. The 'Total Responses Needed' is set to 1. Under 'Primary Contacts', there are 3 Individuals, 0 Groups, 0 Rules, and 0 Map. Below this, 'Escalation Level 1' is configured with a timer of 15 minutes and a 'Click to add contacts' section showing 0 Individuals, 1 Group, 0 Rules, and 0 Map. 'Escalation Level 2' is also configured with a timer of 15 minutes and a 'Click to add contacts' section showing 0 Individuals, 0 Groups, 0 Rules, and 0 Map. At the bottom, there is a link to 'Add another Escalation Level'.

- 7 Optionally, rename the levels by clicking the Pencil icon next to the name, typing its new label, and clicking the Edit icon. For example, you can rename "Primary Contacts" to "Select Primary On-Call."

The screenshot shows the 'Select Contacts' form with the 'Use notification escalation' checkbox checked. The 'Total Responses Needed' is set to 1. Under 'Primary Contacts', the name has been changed to 'Select Primary On-Call' and there is a pencil icon next to it. The 'Click to add contacts' section shows 3 Individuals, 0 Groups, 0 Rules, and 0 Map. Below this, 'Escalation Level 1' is configured with a timer of 15 minutes and a 'Click to add contacts' section showing 0 Individuals, 2 Groups, 0 Rules, and 0 Map. 'Escalation Level 2' is also configured with a timer of 15 minutes and a 'Click to add contacts' section showing 0 Individuals, 0 Groups, 0 Rules, and 0 Map. At the bottom, there is a link to 'Add another Escalation Level'.



## Settings

### 1 Review your Settings.

These are the default values set by your Organization Administrators.

- a If a setting has a View link, hover the mouse over the link to see the details.

**Select Contacts** ☐ Use notification escalation ?

\* Click to add contacts

0  
Individuals

0  
Groups

0  
Rules

0  
Map

[Preview contacts](#)

**Settings** [Edit](#)

\* Sender E-Mail Display:

susan.stoba@everbridge.com

\* Sender caller ID:

[View](#)

Delivery Order:

Contact Preferred

\* Delivery methods:

Primary email  
Phone 1  
Primary SMS  
Tap  
1 Way  
Mobile Member

Mobile Member App Settings:

[View](#)

Apply voice delivery throttling rules:

No

Broadcast duration:

1 hr(s)

Contact cycles:

1

Interval between cycles:

0 min(s)

Interval between delivery methods:

0 min(s)

Voice mail preference:

No Message

Confirm:

Yes

Language:

English (US)

**Send & Save**

### 2 If you have permission, you can edit the Settings.

- Make your changes, as needed.
- Scroll to see all the settings.



- As an example, select the Confirm check box to give the contacts the ability to confirm receipt of the message.

**Settings** [Hide](#)

\* Sender E-Mail Display: [rod.lemmon@gmail.com](#)

Sender E-Mail Display:

\* Sender caller ID: [View](#)

United States  <Default>

Inmarsat (Ships At Sea)

Delivery Order:  ⓘ

\* Delivery methods:

☐ Work Email

☒ Mobile Member App

☐ Work Phone

☐ Text Message

☐ TAP Pager

☐ Home Email

☐ TTY 1

Mobile Member App Settings: [View](#)

☒ Request location

☒ Request image

☒ Request additional information

☒ Enable Sharing Options

Apply voice delivery throttling rules: No

☐ Apply voice delivery throttling rules for this notification

Broadcast duration: 1 hr(s)

Broadcast duration  hr(s)

Contact cycles: 1

Contact cycles

Interval between cycles: 0min(s)

Interval between cycles  min(s)

Interval between delivery methods: 0min(s)

Interval between delivery methods  min(s)

Voice mail preference: No Message

☐ Message Only

☐ Message with Confirmation

☒ No Message

Confirm: Yes

☒ Confirm

Language: English (US)

Language

**Send & Save**

Send: ☒ Now ☐ Later ☐ Recurring

- Or - ☐ Save as a notification template

☐ Include as part of an event



- Click Hide to close the settings.

**Settings** [Hide](#)

\* Sender E-Mail Display: rod.lemmon@gmail.com

Sender E-Mail Display: rod.lemmon@gmail.com

\* Sender caller ID: [View](#)

United States 8185001258 <Default>

Inmarsat (Ships At Sea) 81231234

Delivery Order: Contact Preferred

\* Delivery methods: Please select...

☐ Work Email

☒ Mobile Member App

- 3 In the Send & Save section, select one of the following:

**Send & Save**

Send: ☒ Now ☐ Later ☐ Recurring

- Or - ☐ Save as a notification template

☐ Include as part of an event

[Send](#) [Cancel](#)

- Now—to send the notification immediately.
  - Later—to schedule the notification to automatically launch at a later date and time. Click the Calendar icon, then select the future date and time for the notification.
  - Recurring—to configure how often to send the notification. Click the Calendar icon to select the date ranges and click the Clock icon to select the time.
  - Save as a Notification Template—to save this notification as a template so it is ready for you to send when you need it. You can save it in a Category to make it quicker for you to find when you want to send it. Select one of your previous Category names from the drop-down list or enter a new category name directly into the text box.
- 4 Optionally, select the check box: Include as part of an event.  
This way, if you associate the notification with an event, then you can view the event and see the history of the notifications, all in one place. Select from the drop-down list or type a new event name directly into the text box. See *Events* on page 79.
  - 5 Depending on your Send & Save selection, click the Send button, the Schedule button, or the Save button, as appropriate.  
After the notification is sent, you can monitor the results. See *Active/History*, next.



## To monitor results

In the Active/History list, you see one line per notification, showing the basic information of active notifications and those notifications that have ended.

- 1 If the sender selected the Confirm check box, as a notification continues, refresh your page so that you can see the status of your contacts as they listen to details on their devices and the stages of confirming receipt of the message.

**NOTE:** At the Account level, the Active/History shows only the Account Administrator's results. Unlike the Organization level, the Account level includes an Organization column.

- 2 Drill into the results by clicking the title of the notification.  
The report shows the settings that were used to send the notification.
- 3 Click Delivery Details to drill further into this notification.  
You can see detailed information for each contact you tried to reach. You can continue to monitor the results until the end of the event, including rebroadcasting and additional information.  
In the Results Chart section, you can see the contacts who confirmed, confirmed late, or those who were unreachable.
- 4 As needed, you can Stop an active notification in case the notification has changed, has been resolved, or you made a mistake. Click Yes to stop the notification.  
Stopping a notification does not affect messages that have already been sent, but stops the system from sending more messages.
- 5 Optionally, from the Actions menu, click Send Follow Up to send a unique follow-up message about the next stage of this notification. (For details, see the procedure *To send a Follow-Up* on page 123.)
- 6 Optionally, from the Actions menu, click Rebroadcast.  
A rebroadcast resends the original message to contacts who have not yet confirmed receiving it. (For details, see also the procedure *To rebroadcast* on page 124.)



## Including a Voice Recording

### To add a new voice message template using a computer microphone

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

**Create Message**

☐ High priority message ⓘ [Use a message template](#)

\* Title  
Chemical spill at Wall St

Body ☐ Include a separate message for email notifications ⓘ  
All delivery methods  
There is a chemical spill at our Wall St location. Hood team report there. All others evacuate until you receive all clear message.

Email/Fax : 2342, SMS : 82, Estimated # of SMS : 2 ⓘ

Notification Header & Footer ⓘ  
☒ Include a Voice Recording  
☒ Use Everbridge recorder ☐ Use a telephone ☐ Upload a file

**EVERBRIDGE RECORDER**  
00:15  
Uploaded

1: Lucy Kajimoto, 2014-06-06 13:34:02 PDT, 1428 KB

☐ Save this as a message template

Message type:  
☒ Standard ⓘ ☐ Polling ⓘ ☐ Conference Bridge ⓘ

[Attach Files](#) ⓘ

- 9 To listen to your recording, click Play (the red symbol next to the Trash Bin).
- 10 If you are satisfied with your recording, record it again by repeating steps 4 through 9.



- 11 Optionally, assign the template to a Category to make it quicker to find in the list. Select from the drop-down list or type the Category name directly in the text box.
- 12 Click Save.  
The template is on the Message Templates list and ready to be used in a notification as a Voice message.

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

### To add a new voice message template using a land line telephone

- 1 From the Message Templates sub-tab, click Add.  
The Add Message Template page appears.
- 2 Type a title for this message.
- 3 Type the Body of the message.  
When you send this message to a text path like email or SMS, this is the message text that is sent. If you are only going to deliver this message over voice paths, the body text is not required, but it is still a good idea.
- 4 Select the check box: Include a Voice Recording.
- 5 Select the radio button: Use a telephone.
- 6 Click the link: Open recording instructions.  
The Telephone Recording Instructions are displayed. An example is shown next.

The screenshot shows a dialog box titled "Telephone Recording Instructions". It contains a list of four numbered steps: 1. Call +1-626-340-4664 (US), +44-20-3322-9226 (UK); 2. When prompted, enter this personal identification number: 7199; 3. Follow the prompts on the phone to record (and if necessary delete and re-record) your message.; 4. When you are happy with your message click Save Recording. Below the steps is a note: "If you get disconnected from the call or this website for any reason before finalizing your message, re-dial the number and enter the pin above to start again." At the bottom are two buttons: "Save Recording" (orange) and "Cancel" (grey).

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

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



### To upload a message

- 1 From the Message Templates sub-tab, click Add.  
The Add Message Template page appears.
- 2 Type a title for this message.
- 3 Type the Body of the message.  
When you send this message to a text path like email or SMS, this is the message text that is sent. If you are only going to deliver this message over voice paths, the body text is not required, but it is still a good idea.
- 4 Select the check box: Include a Voice Recording.
- 5 Select the radio button: Upload a voice recording.
- 6 Make sure the file you want to upload matches the technical specifications for a file.  
(See the specifications on-screen.)
- 7 Click the link: Upload a voice recording.
- 8 Select the file to upload.

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

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

- 9 Optionally, assign the template to a Category to make it quicker to find in the list.  
Select from the drop-down list or type the Category name directly in the text box.
- 10 Click Save.  
The template is on the Message Templates list and ready to be used in a notification as a Voice message.

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





# Active/History

After sending your notification, you can monitor the results and status of the notification. From the Active/History sub-tab, you can see how many notifications:

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

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

Corporate Security (Organization Admin) Welcome Luci Kajimoto (lkajimoto) | [Help & Support](#) | [Logout](#)

Dashboard
Universe
**Notifications**
Incidents
Contacts
Reports
Settings
Access

Notifications ?

[New Notification](#)

In Progress 0
Last 7 days 0
Last 30 days 0

Active/History
Scheduled
Notification Templates
Message Templates

Search

Status	Published	Title	Event Name	Sent On	Sent By	Sent To	Charts
✓ ↑ Escalated		<a href="#">EOC Drill - 7 April</a>		2014-04-07 14:46:44 CDT	Nelson Daza	<a href="#">10</a>	
✓ <a href="#">Actions</a> ▾		<a href="#">Everbridge Test Message 2</a>		2014-03-13 13:39:10 CDT	Nelson Daza	<a href="#">2</a>	
✓ <a href="#">Actions</a> ▾		<a href="#">Everbridge Test Message</a>		2014-03-13 13:30:01 CDT	Nelson Daza	<a href="#">2</a>	
✓ <a href="#">Actions</a> ▾		<a href="#">TEST EOC Drill</a>		2014-03-13 13:14:21 CDT	Nelson Daza	<a href="#">1</a>	
✓ <a href="#">Actions</a> ▾		<a href="#">TEST EOC Drill</a>		2014-03-13 13:11:28 CDT	Nelson Daza	<a href="#">1</a>	
✓ ↑ Escalated		<a href="#">Chemical Spill</a>		2014-02-01 22:32:18 CST	Nelson Daza	<a href="#">8</a>	
✓ ↑ Escalated		<a href="#">EOC Drill</a>		2014-01-31 23:45:57 CST	Nelson Daza	<a href="#">10</a>	
✓ ↑ Escalated		<a href="#">TEST - Nursing Shift Available</a>		2014-01-31 16:40:59 CST	Nelson Daza	<a href="#">4</a>	
✓ <a href="#">Actions</a> ▾		<a href="#">Building Evacuation - GO1</a>	<a href="#">Evacuation GO1 0618</a>	2013-06-18 14:08:50 CDT	CorporateSecurity Operator	<a href="#">4</a>	
✓ <a href="#">Actions</a> ▾		<a href="#">Custom Header/Footer</a>		2013-04-08 16:21:02 CDT	Nelson Daza	<a href="#">1</a>	

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The fields on the Active/History sub-tab are described in the following table.

Field or Area	Description
Search	Use a string that is from the Title column. This search feature uses the “contains” condition. For example, to find all notifications with the name “Office”, you could type the full word or the partial word, <b>Office</b> or <b>off</b> . When you click the Search (magnifying glass) icon, the application finds all notifications whose names include “Office” or “off”. To clear the search, delete the search term, and click Search again.
Status	Indicates the status: Active (a green icon), Sent (a gray check mark), or Stopped (a red “X”).
Actions	The Actions drop-down menu offers the actions that you can perform: Stop (if Active), Rebroadcast, and Send Follow Up. (These actions are also available from the Notification Details page.)  An Up arrow indicates the notification has escalations. This Up arrow replaces the Actions drop-down menu.
Published	If you used a Publishing Option, a “P” icon appears in the row of the notification. Hover your mouse over the “P” to see which publishing option: Everbridge Network, Alertus, CMAS/WEA, or Web Posting.
Title	The name of the notification. Clicking the title opens the Notification Details page for that notification.
Event Name	The name of the event of which your notification is a part. Clicking an event name launches the Event Summary.
Sent On	When the notification was sent.
Sent By	The full name of the user who sent the notification.
Sent To	Shows the number of contacts sent the notification. Click the link to see the names of the contacts, the attempt times, path types, paths, if the contact confirmed, the time of the confirmation, call results, and location. This report is a Microsoft Excel spreadsheet that you can optionally rename and save to your desktop.
Charts	Hover the mouse to see a quick view of the number of contacts confirmed, confirmed late, unreachable, and not confirmed. Click the pie chart for a larger view. Hover the mouse over the chart to see the percentages. From the larger view, you can also print the chart or save as a PNG or JPEG image, a PDF document, or a SVG vector image.

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

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



# Notification Details

In Notification Details, the application automatically groups all the notifications for an event into a single view and a single report. This way, your organization can review the notifications and other artifacts, in chronological order.

Susan Stoba Test Organization (Organization Admin)

Welcome Lucy Kajimoto (lucykajimoto) | [Help & Support](#) | [Logout](#)

[Dashboard](#) [Universe](#) **[Notifications](#)** [Incidents](#) [Contacts](#) [Reports](#) [Settings](#) [Access](#)

[Notifications](#) > [Active/History](#) > [Details](#)

SENT **Chemical spill at Wall St**

Notification ID:4402341507990

[Escalation Summary](#) Confirmed Responses Needed: 1

[Escalation Summary](#)

Escalation Name	Status	Sent	Confirmed	Not Confirmed	Start Time	End Time	Notification ID
1) Primary Contacts	Sent	2	0	1	2014-02-13 07:33:22 PST	2014-02-13 08:33:22 PST	4402341507990
<a href="#">2) Escalation Level 1</a>	Sent	4	0	4	2014-02-13 07:38:30 PST	2014-02-13 08:38:30 PST	48382806595785
<a href="#">3) Escalation Level 2</a>	Sent	5	0	4	2014-02-13 07:43:40 PST	2014-02-13 08:43:40 PST	92363271706615

[Rebroadcast](#) [Send Follow Up](#)

[Status](#) [Method](#)

**Details**

**Message**

**Notification Type:** Standard

**Priority Greeting:** No

**Recurring:** No

**Sent From:** Web Manager Portal

**Start:** 2014-02-13 07:33:22 PST

**End:** 2014-02-13 08:33:22 PST

**Sent by:** Lucy Kajimoto

**Sent to:** [2 contacts](#)

**Voice Recording:** None

**Message Format:** Text

**Escalation:** Yes

**Message**

Chemical spill at Wall St

There is a chemical spill at our Wall St location. HazMat team report there. All others evacuate until you receive all clear message!

[Delivery Details](#) [Settings](#)

Confirmed	Contact Name	Confirmed Method	Confirmed Method Value	Confirmation Time	First Attempt Time	Response
+ N	Allison Kajimoto					
+ N	Lucy Kajimoto				2014-02-13 07:33:27 PST	

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[Print](#)



The Settings sub-tab displays the contact and notification settings of this notification.

To view a notification report, click its title from the Active/History list. The following table describes the fields in the report.

Field Name	Description
Escalation Summary	If the check box: Use notification escalation was selected, in the upper left-hand corner of the Details page, you see the Escalation Summary. You see each escalation level. When you select an escalation, the Status sub-tab displays the corresponding chart.
Status and Name	Under the Escalation Summary, if there, you can immediately see the notification name and its status.
Action buttons	Depending on the status, action buttons are provided for quick access. If the status is Active, you see a Stop button. You also see a Rebroadcast and Send Follow Up button if the status is not Stopped.
ID	If you need to contact Everbridge about this notification, you must provide this ID number.
Notification Type	Standard, Polling, or Conference.
Priority	Yes = High Priority.
Recurring	Yes = Recurring.
Start	Date and time messages began broadcasting.
End	Date and time messages stopped broadcasting. If the notification ran its duration, you will see the corresponding times in the Start and End fields. If the notification was stopped by a sender, the End time would be before the length of the duration.
Sent by	Message sender's name.



Field Name	Description
Sent/Stopped on	Date and time sent or stopped. If stopped, you see the name of the person who stopped the notification.
Voice Recording	The type of voice recording, if any.
Message Format	The format of the message, such as Text.
Event	Event name with which this notification is associated, if any.
Attach Files	Names of any attached files sent to email, fax, or Everbridge Mobile Member recipients.
Conference Bridge	If used, the name, numbers, and access code of the conference bridge.
Message Title and Message	The message that was sent. If the message contained a recorded voice file, there is a link to the file. You can click the link to listen to the message.
Status	<p>By default, the Results Chart shows confirmation status: Confirmed, Not Confirmed, Confirmed Late, and Unreachable. The pie chart shows the percentage of contacts in each of the statuses. From Active/History, hover the mouse over the chart to view the percentage of contacts in each status.</p> <p>You can also chart confirmations by delivery path. Use this to find the delivery paths that your contacts actually used to receive and confirm the message.</p>
Delivery Details	<p>To find out about individual contacts, click this tab. From this page, you can see information for each contact selected to receive the notification.</p> <p>For all contacts, you can see if they confirmed receiving the message and the time they confirmed. By default, the list is displayed in alphabetical order by the Contact Name. You can change the sort by clicking a column heading. To see an individual's details, click the Plus (+) sign in the row next to the specified name; click the Minus (-) sign in the row next to the specified name to close the individual's details. This is where you see the history of each attempt to reach each contact and the results of each attempt.</p>
Settings	<p>The Settings show the contacts, groups, and rules used in this notifications, as well as any contact polygons.</p> <p>The Notification settings section shows the key settings used to send the notification.</p>
Print	Click Print to print this report for distribution or archival purposes.

## To send a Follow-Up

- 1 From the Notification Details page, click Send Follow Up.  
The targets of this notification are the contacts to whom you sent the original message.
- 2 Select the check boxes corresponding to the people who should get the follow-up message: Confirmed, Confirmed Late, Unreachable, and Not Confirmed.  
For example, you will want to select all check boxes if everyone should receive an "All Clear" message.
- 3 Click Next.

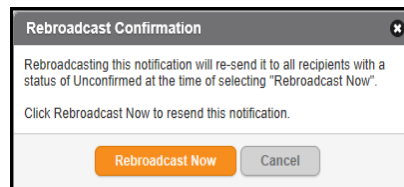


The original notification is displayed. You can change this in full or partially by adding a few words to the title. Using the example above, you could add **Cancelled** to the title and a sentence at the end of the body: **This warning has been cancelled.**

- 4 If there is an uploaded Voice for the original message, delete it by selecting the Trash Bin and record your update message.  
Or, you can allow text-to-speech to be generated instead of recording or uploading an updated follow-up voice message.
- 5 Review and edit the Settings, as needed.
- 6 Click Send.

### To rebroadcast

- 1 From the Notification Details page, click Rebroadcast.  
The Rebroadcast Confirmation appears.



- 2 Read the note.
- 3 Click Rebroadcast Now.

## Event Summary Reports

To view the notifications that are associated with an event, look at the notifications history from the Active/History sub-tab. For each notification, you see the event name associated with it next to the Notification title, if any.

To view an Event Report, see *Event Analysis* on page 208.



# Notification Templates

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

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

- ◇ message
- ◇ contacts who will receive it
- ◇ settings for the notification

The screenshot displays the Everbridge web interface for the 'Notification Templates' sub-tab. At the top, there's a navigation bar with 'Dashboard', 'Universe', 'Notifications' (highlighted), 'Incidents', 'Contacts', 'Reports', 'Settings', and 'Access'. Below the navigation bar, the 'Notifications' section is active, showing a 'New Notification' button and tabs for 'Active History', 'Scheduled', 'Notification Templates' (selected), and 'Message Templates'. A search bar is present on the right. The main content area is a table with the following columns: 'Published', 'Title', 'Type', 'Category', 'Created On', 'Created By', 'Contacts?', and 'Settings?'. The table lists several templates, including 'Chemical spill at Wall St', 'SMS Callback Selected', 'Tornado Alert at Will Rodgers World Airport OKC', 'Flood Warning', 'Test of Conference broadcast template', and 'Chemical spill at Wall St'. The interface also includes a 'Send' button and a 'Page 1 of 1 | 25' indicator.

From the Notification Templates sub-tab, you can launch a new notification and you can see your organization's notification templates. You can also add a new notification template from this page. An organization can have an unlimited number of notification templates.

The fields on the Notification Templates sub-tab are described in the following table.

Field or Area	Description
Search	Use a string that is from the Name column. This search feature uses the "contains" condition. For example, to find all templates with the name "Office", you could type the full word or the partial word, <b>Office</b> or <b>off</b> . When you click the Search (magnifying glass) icon, the application finds all templates whose names include "Office" or "off".
Check box	To select an individual template.
Pencil icon	Click the Pencil icon in the row of the template to edit. The Edit Notification Template appears. The fields are pre-filled and you need only modify the necessary fields.



Field or Area	Description
Delete	Click the Trash Bin in the row of the template to delete. Use this button to permanently remove the selected template from your Notification Templates sub-tab.
Published	If you used a Publishing Option, a "P" icon appears in the row of the notification. Hover your mouse over the "P" to see which publishing option: Everbridge Network, Alertus, CMAS/WEA, or Web Posting.
Title	The name of the template as your operators will see it in their list of notifications. If the notification is a high-priority notification, a red exclamation icon precedes the title.
Type	The message type: Standard, Polling, or Conference Bridge.
Category	Displays the name of the category or folder to which you assigned your template. You are not required to place a template in a category.  If there is more than one category already in your library, click the Down arrow to either add your template to a category or change the category for the template. If you select a different category, your template is moved. If you do not want your template in a category anymore, select "No Category".
Created On	The time stamp when the notification template was added.
Created By	The full name of the person who added the template.
Contacts?	A check mark indicates contacts were added to the template.
Settings?	A check mark indicates options were set in the settings for the template.

From the Notification Templates sub-tab, you can view or edit an existing template by selecting the Pencil icon in the row of the desired template. You can send the template "as is" or edit it and then send. Optionally, include the notification as part of an event, then click Send.

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

**NOTE:** The Account Administrator (Account level) sees only the templates saved at the Account level, although Account Administrators can see any template that is created in the entire account, including its Organizations. Likewise, the Organization Administrators can see any template that is created in their organization. For other roles at the Organization level, the templates are role-specific. If a role is allowed to create templates, then others in that role can use that template. For example, Dispatchers can see/use only templates created by other Dispatchers. However, if your organization has five different Dispatcher roles, then each will see only the templates for their specific role and not the templates for the other four Dispatcher roles. Only Mass Notification Operators are 'assigned' templates.





## Adding Notification Templates to the Role

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

### Adding a Notification Template to the Mass Notification Operator Role

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



## Scheduled / Recurring Notifications

The Scheduled sub-tab contains the notifications that you predefined and pre-filled while planning for emergencies and other events ahead of time. From this list, you can select the template that has been scheduled to be released on a specific date or the recurring (or repeating) notification.

The screenshot shows the Everbridge Notifications page. The top navigation bar includes links for Dashboard, Universe, Notifications (active), Incidents, Contacts, Reports, Settings, and Access. The main content area is titled 'Notifications' and has a 'New Notification' button. Below this are tabs for Active/History, Scheduled (selected), Notification Templates, and Message Templates. A search bar is on the right. The table below lists notifications:

Title	Event Name	Type	Created On	Created By	Sched/Recurrence
Earthquake Preparedness Training in Santa Clarita		Recurring	2014-06-06 14:07:58 PDT	Lucy Kajimoto	MONTHLY
Chemical spill at Wall St		Schedule	2014-06-06 14:04:33 PDT	Lucy Kajimoto	2015-05-16 08:00:00 PDT

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Under the Scheduled column on the right-hand side of the list, for Scheduled notifications, you can see the date and time of scheduled notifications. For Recurring notifications, hover the mouse to see the start and end dates, how often the notification will repeat, and the number of days.



Susan Stoba Test Organization (Organization Admin)

Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

everbridge

DashboardUniverseNotificationsIncidentsContactsReportsSettingsAccess

Notifications ?

New Notification

In Progress 0Last 7 days 0Last 30 days 0

Active/HistoryScheduledNotification TemplatesMessage Templates

Search

Title	Event Name	Type	Created On	Created By	Sched/Recurrence
Earthquake Preparedness Training in Santa Clarita		Recurring	2014-06-06 14:07:58 PDT	Lucy Kajimoto	MONTHLY
Chemical spill at Wall St		Schedule	2014-06-06 14:04:33 PDT	Lucy Kajimoto	Starts from: 2014-06-15 00:00:00 PDT Ends on: 2015-06-15 23:59:59 PDT Repeat every: 3 Month(s) Repeat on: 10:00 of day 15

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View 1 - 2 of 2

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javascriptvoid(0)



# Message Templates

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

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

## About Text Messages

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

- ◇ Only use characters that you find on a standard keyboard.
- ◇ Do not paste text from a word processing application or a web page that may add special formatting characters, even if they are invisible.
- ◇ Avoid special characters, such as an ampersand (&) or percent sign (%).

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



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

### To add a new text message template

- 1 From the Message Templates sub-tab, click Add.  
The Add Message Template page appears.
- 2 Type a title for this message.  
If this message is sent by email, fax, or SMS, the title becomes the subject line of the email.
- 3 Type the Body of the message.  
When you send this message to a text path like email or SMS, this is the message text that is sent. If you send this message to a voice path like a phone, a text-to-speech engine reads this message to the contact.
- 4 Optionally, assign the message template to a Category to make it quicker to find in the list.  
Select from the drop-down list or type the Category name directly in the text box.
- 5 Click Save.  
The template is on the Message Templates list and ready to be used in a notification as a Text message.

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



## Maintaining Your Message Templates

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

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

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

Susan Stoba Test Organization (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe **Notifications** Incidents Contacts Reports Settings Access

Notifications ?

+ New Notification

Active History Scheduled Notification Templates **Message Templates**

+ Add

Search

Title	Category	Voice/Text	Created By	Created On
Tornado Alert at Will Rodgers World A...	Weather	Text	Lucy Kajimoto	2013-09-26 14:05:21 PDT
Flood Warning		Text	Lucy Kajimoto	2013-03-26 11:21:14 PDT
Earthquake Preparedness Training in...		Text	Lucy Kajimoto	2013-03-26 10:54:02 PDT
Chemical spill at Wall St		Text	Lucy Kajimoto	2013-03-26 10:47:11 PDT

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

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

# Contacts

This chapter provides information about Contact Management.

**The following topics are covered:**

- ♦ *Overview of Contacts*
- ♦ *Searching for Contacts*
- ♦ *Groups and Rules*
- ♦ *Managing Your Contacts*
- ♦ *Managing Contacts Individually*
- ♦ *Preparing to Upload Contacts*
- ♦ *Uploading a Contact Data File Manually*
- ♦ *Uploading a Contact Data File Via Secure FTP*



## Overview of Contacts

The Contacts tab is where you can add and maintain Contacts. See *Roles* on page 5 for an understanding on who can perform Everbridge Suite activities such as manage contacts, send notifications, and add groups and rules.

Some examples of your system of record for your contact data follow:

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

An organization sends notifications to its own contacts. The contacts in an organization can be assigned to one or more groups. You can select one or more groups to receive a notification. An account administrator can add a Group Manager for a group within an organization.





## The Main Contacts Page

	First Name	M.I.	Last Name	Suffix	External ID	Record Type	Last Modified Date	Last Modified By
<input type="checkbox"/>	Craig		Barrick		8185772201	Employee	2014-06-10 12:50:49 CDT	Lucy Kajimoto
<input type="checkbox"/>	Sharon	M	Bennett		3.22E+18	Employee	2014-04-02 12:09:00 CDT	Lucy Kajimoto
<input type="checkbox"/>	Scott		Colby		8185772220	Employee	2014-07-28 10:19:37 CDT	Lucy Kajimoto
<input type="checkbox"/>	Brad		Currier		8185772321	Employee	2014-04-02 12:06:54 CDT	Lucy Kajimoto
<input type="checkbox"/>	Yvonne		Gallegos		8182309748	Employee	2014-06-03 12:35:23 CDT	Lucy Kajimoto
<input type="checkbox"/>	Lucy		Kajimoto		8182309732	Employee	2014-04-02 12:06:54 CDT	Lucy Kajimoto
<input type="checkbox"/>	Cindy		Kwok		8185772382	Employee	2014-04-02 12:14:16 CDT	Lucy Kajimoto
<input type="checkbox"/>	Happily		Li		Beijing03	Member Portal	2014-06-19 12:32:32 CDT	Lucy Kajimoto
<input type="checkbox"/>	Sheila		Morgan		8185772219	Employee	2014-04-02 12:14:16 CDT	Lucy Kajimoto
<input type="checkbox"/>	Lemon		Tu		Beijing01	Employee	2014-06-09 19:27:55 CDT	Lucy Kajimoto
<input type="checkbox"/>	Linder		Wang		Beijing02	Opt-In	2014-06-09 19:30:03 CDT	Lucy Kajimoto

### Viewing the Contacts List

The list of contacts is sorted alphabetically by Last Name. Click the desired column heading to sort on that value instead. Click the column heading again to reverse the sort order.

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

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



**NOTE:** You see the Device icon and the “Mobile device registration” selection from the Send Invitation Email drop-down list only if the following three conditions are met:

- 1 Your Everbridge representative has selected Mobile Member in the Account/ Organization pages of EBAAdmin.
- 2 There is a Mobile Member delivery method identified in Settings > Organization > Notifications > Delivery Methods.
- 3 The Private portal type is selected in Settings > Member Portal > Portal Options.

	First Name	M.I.	Last Name	Suffix	External ID	Record Type	Last Modified Date	Last Modified By
<input type="checkbox"/>	Maebly		Bluth		Maebly	Employee	2014-01-25 22:20:54 CST	Leslie Knope
<input type="checkbox"/>	Buster		Bluth		Buster	Employee	2014-05-07 13:22:28 CDT	Leslie Knope
<input type="checkbox"/>	Michael		Bluth		Michael	Employee	2014-05-07 13:22:28 CDT	Leslie Knope
<input type="checkbox"/>	Billy		Bob		408981163414935024	Employee	2014-05-07 17:04:03 CDT	Member App
<input type="checkbox"/>	Billy		Bob		358779306404942102	Employee	2014-05-07 17:03:46 CDT	Member App
<input type="checkbox"/>	Billy		Bob		6738989772420570640	Employee	2014-05-07 17:03:23 CDT	Member App
<input type="checkbox"/>	Billy		Bob		9168779547323181426	Employee	2014-05-07 16:26:42 CDT	Member App
<input type="checkbox"/>	Billy		Bob		2888471844943987291	Employee	2014-05-07 17:04:15 CDT	Member App
<input type="checkbox"/>	Billy		Bob		325805800003964908	Employee	2014-05-07 16:26:58 CDT	Member App
<input type="checkbox"/>	Dave		Brown		2235541860293310917	Security	2014-04-15 17:00:06 CDT	Leslie Knope
<input type="checkbox"/>	Nelson		Daza		Ndaza	Employee	2013-11-20 17:32:08 CST	Leslie Knope
<input type="checkbox"/>	Bobbie		Dee		BDMJ3	Employee	2014-05-08 10:06:44 CDT	Martello Jones
<input type="checkbox"/>	Android		Device		Android	Employee	2014-04-14 14:07:45 CDT	Leslie Knope
<input type="checkbox"/>	Bobby1	B	Dilan		MUD3	Employee	2014-05-13 09:37:30 CDT	Martello Jones

## Managing Contacts

From the Contacts tab, to view a contact record, click the name. All of the information for the selected contact is displayed. Click Contacts in the upper left-hand corner of the page to return to the Contacts list.

To edit a contact's record, click the Pencil icon in the specified row. The fields are enabled to so that you can change the information. Click Save when you are done. To delete a contact record, click the Trash Bin in the specified row. Confirm the deletion.

For more details, see *About Contact Data* on page 159.

## Downloading Contact Records

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

- ♦ To download a CSV file containing all contacts, make sure all check boxes are clear for all records, then click Download. Save the file to your local computer resource.



- ◊ To download a CSV file containing only some of the contacts, select the check box in the row next to each desired contact.

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

Click Download. Save the file to your desktop.

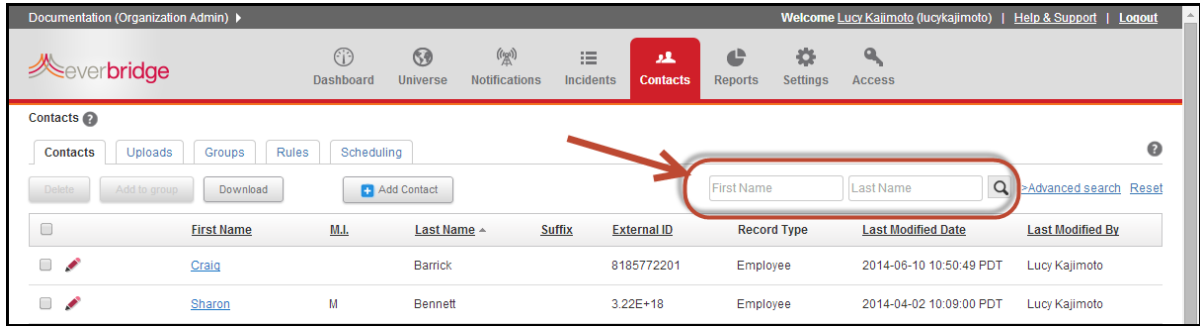
## Using Search or Advanced Search

See *Searching for Contacts* for information on using Search or Advanced Search.



# Searching for Contacts

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



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

## Filtering Your Search

You use the Advanced Search function to:

- ◇ locate contacts from the Contacts tab
- ◇ select individuals to receive a notification

In either case, you search in the same way. Advanced Search is also used as custom filters in the Rules sub-tab.

### To use one filter

- 1 Do one of the following:
  - If you are sending a notification, from the Notifications tab, click New Notification. In the Select Contacts section, click Individuals. Click Advanced Search.
  - If you are managing contacts, from the Contacts tab, click Advanced Search. The Contact Information fields are available, including General Information, Locations, Contact Paths, Additional Information, Subscriptions, and Contact Record Type.
- 2 Select a field from the drop-down list on which to search.  
The list displays the contact fields. The fields include ones for contact management, such as whether a contact's address is geo-coded.
- 3 Select the condition on which you want to search.  
The conditions depend on the type of data in the field. For example, a Name field is a text field. A text-formatted field may have different conditions than a date-formatted field.



- 4 Type the value in the correct format for the data type.
  - A Date data type must be in YYYY-MM-DD format. This field offers a Calendar icon, from which you can select the desired date. The String data type can be any alphanumeric characters, and the Number data type can be numeric characters.
  - If the field type offers a single-select list, choose one value. If the field type offers a multi-select list, choose one or more values by selecting the first value, then pressing and holding down CTRL while selecting the other values.
  - To select a range of values, select the first value, then press SHIFT while selecting the last value in the range.
- 5 Click Search.

Your list is filtered to show only contacts from your Advanced Search.

### Example Using One Filter

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

- 1 From the Contacts tab, select Advanced Search.

The Advanced Search pane is displayed.

Documentation (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe Notifications Incidents **Contacts** Reports Settings Access

Contacts ?

Contacts Uploads Groups Rules Scheduling

Advanced Search X

Field Condition Value

Add Filter Search: Select Field

☐ Save as a rule

Search Clear

Delete Add to group Download Add Contact

First Name Last Name Search >Advanced search Reset

	First Name	M.I.	Last Name	Suffix	External ID	Record Type	Last Modified Date	Last Modified By
<input type="checkbox"/>	Craig		Barrick		8185772201	Employee	2014-06-10 10:50:49 PDT	Lucy Kajimoto
<input type="checkbox"/>	Sharon	M	Bennett		3.22E+18	Employee	2014-04-02 10:09:00 PDT	Lucy Kajimoto
<input type="checkbox"/>	Scott		Colby		8185772220	Employee	2014-07-28 08:19:37 PDT	Lucy Kajimoto
<input type="checkbox"/>	Brad		Currier		8185772321	Employee	2014-04-02 10:06:54 PDT	Lucy Kajimoto
<input type="checkbox"/>	Yvonne		Gallegos		8182309748	Employee	2014-06-03 10:35:23 PDT	Lucy Kajimoto
<input type="checkbox"/>	Lucy		Kajimoto		8182309732	Employee	2014-04-02 10:06:54 PDT	Lucy Kajimoto
<input type="checkbox"/>	Cindy		Kwok		8185772382	Employee	2014-04-02 10:14:16 PDT	Lucy Kajimoto
<input type="checkbox"/>	Happily		Li		Beijing03	Member Portal	2014-06-19 10:32:32 PDT	Lucy Kajimoto



- From the Condition drop-down list, select the desired field for the filter.  
In this example, Associated Group(s) is selected.

The screenshot shows the Everbridge Contacts page. The 'Advanced Search' modal is open, and the 'Condition' dropdown is set to 'Associated Group(s)'. The table below lists the contacts.

	Last Name	Suffix	External ID	Record Type	Last Modified Date	Last Modified By
<input type="checkbox"/>	Barrick		8185772201	Employee	2014-06-10 10:50:49 PDT	Lucy Kajimoto
<input type="checkbox"/>	Bennett		3.22E+18	Employee	2014-04-02 10:09:00 PDT	Lucy Kajimoto
<input type="checkbox"/>	Colby		8185772220	Employee	2014-07-28 08:19:37 PDT	Lucy Kajimoto
<input type="checkbox"/>	Currier		8185772321	Employee	2014-04-02 10:06:54 PDT	Lucy Kajimoto
<input type="checkbox"/>	Yvonne Gallegos		8182309748	Employee	2014-06-03 10:35:23 PDT	Lucy Kajimoto
<input type="checkbox"/>	Lucy Kajimoto		8182309732	Employee	2014-04-02 10:06:54 PDT	Lucy Kajimoto
<input type="checkbox"/>	Cindy Kwok		8185772382	Employee	2014-04-02 10:14:16 PDT	Lucy Kajimoto
<input type="checkbox"/>	Happily Li		Beijing03	Member Portal	2014-06-19 10:32:32 PDT	Lucy Kajimoto



- 3 Locate and select the value you want to query and click Search.  
In the Value field, in this example, the application displays the list of contact records assigned to the selected group from which to choose.

	First Name	M.I.	Last Name	Suffix	External ID	Record Type	Last Modified Date	Last Modified By
<input type="checkbox"/>	Craig		Barrick		8185772201	Employee	2014-06-10 10:50:49 PDT	Lucy Kajimoto
<input type="checkbox"/>	Sharon	M	Bennett		3.22E+18	Employee	2014-04-02 10:09:00 PDT	Lucy Kajimoto
<input type="checkbox"/>	Scott		Colby		8185772220	Employee	2014-07-28 08:19:37 PDT	Lucy Kajimoto
<input type="checkbox"/>	Brad		Currier		8185772321	Employee	2014-04-02 10:06:54 PDT	Lucy Kajimoto
<input type="checkbox"/>	Yvonne		Gallegos		8182309748	Employee	2014-06-03 10:35:23 PDT	Lucy Kajimoto

- 4 Click Download to download the contact records for all the members in the group to a Microsoft Excel spreadsheet.  
Or, select the check boxes of the individual contact record(s), then click Download. (You can also view or edit an individual contact record.)

## Using Multiple Fields and Conditions in a Filter

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

### To use multiple fields and conditions in a filter

- 1 Using the example, locate the Fire Wardens.  
Follow the procedure *To use one filter* on page 138 to select the field (Certifications) and condition (is equal to) with the value (Fire Warden).
- 2 Click Add Filter Search.
- 3 Locate the contacts who are in Building 1.  
Follow the procedure *To use one filter* on page 138 to select the field (Location Building) and condition (is equal to) with the value (Building 1).
- 4 Click Search.



When you use more than one filter, all conditions must be true. In this example, the contact must both be certified as a Fire Warden and have an office in Building 1.

- 5 On the Contacts tab, after you have configured a search matching your selected criteria, you can save the filters as a *rule*. Do this by selecting the check box: Save as rule. You can use the rule to locate contacts for a notification. See *Groups and Rules* on page 143 for more information.





# Groups and Rules

Preparing messages, lists of recipients, and other aspects of the notification in advance reduces the chance of human error in sending and responding to notifications. Groups and Rules are two ways to organize your contacts for quick selection. You can configure Groups and Rules for selecting contacts.

## Groups

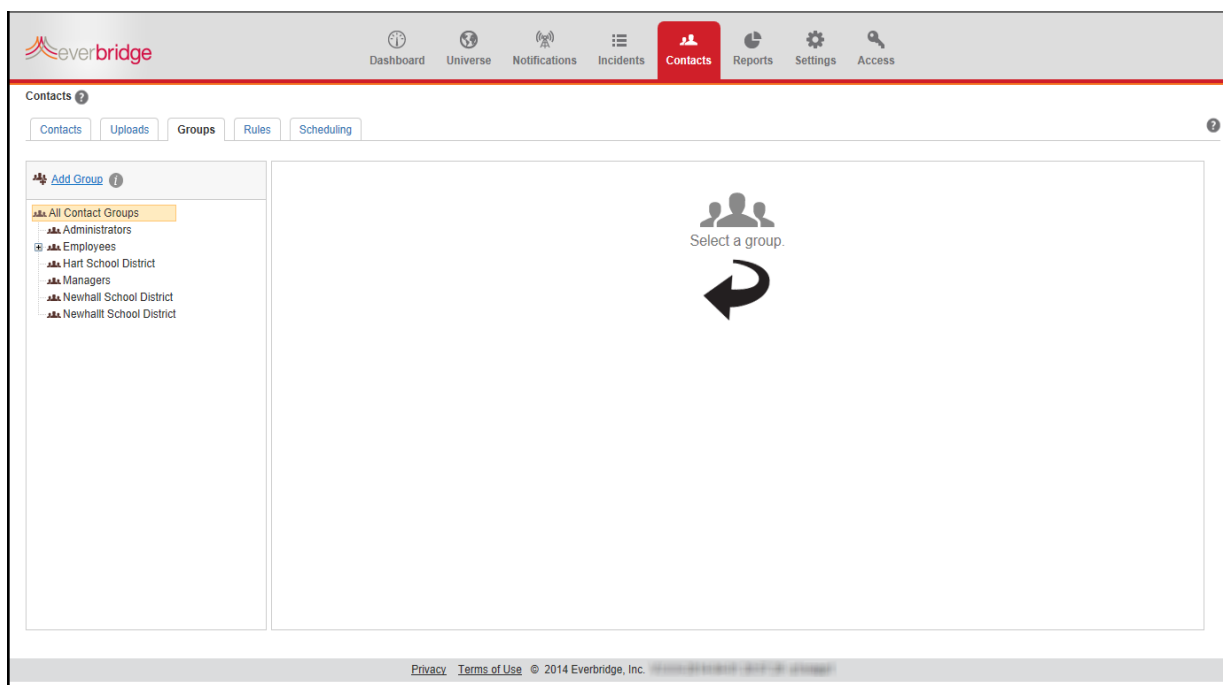
Groups are static, or fixed, lists of contacts that you can maintain. Group Managers can manage contact profiles and send notifications to contacts in their own group.

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

By adding a set of groups before you need to send a notification, you will be ready to respond quickly.

### To add a new group

- 1 From the Contacts tab, select the Groups sub-tab.





- On the left-hand panel, select All Contact Groups or the desired group name if you want to nest a group within a group.
- Select Add Group.

The screenshot shows the Everbridge Contacts interface. The top navigation bar includes Dashboard, Universe, Notifications, Incidents, Contacts (highlighted), Reports, Settings, and Access. The left sidebar shows a tree view of contact groups: All Contact Groups, Administrators, Employees, Hart School District, Managers, Newhall School District, and Newhall School District. The main content area is titled 'New Group' and includes a search bar, a table with columns First Name, M.I., Last Name, External ID, and Record Type, and a message 'There are no items to display in this table.' The bottom of the page shows a footer with Privacy, Terms of Use, and copyright information.

- Type a name for your new group and press ENTER. (If needed, first click the Pencil icon next to "New Group".) I

The screenshot shows the Everbridge Contacts interface with the 'Castaic School District' group selected. The left sidebar shows the same tree view of contact groups, with 'Castaic School District' highlighted. The main content area is titled 'Castaic School District' and includes a search bar, a table with columns First Name, M.I., Last Name, External ID, and Record Type, and a message 'There are no items to display in this table.' The bottom of the page shows a footer with Privacy, Terms of Use, and copyright information.



- 5 From the Contacts tab, select check boxes of the contacts you want as a part of the this new group.

The screenshot displays the Everbridge web interface, specifically the 'Contacts' tab. The top navigation bar includes links for Dashboard, Universe, Notifications, Incidents, Contacts (highlighted), Reports, Settings, and Access. Below the navigation bar, the 'Contacts' section has sub-tabs for Contacts, Uploads, Groups, Rules, and Scheduling. A toolbar contains buttons for Delete, Add to group, Download, and Add Contact, along with a search bar and links for Advanced search and Reset. The main area is a table of contacts with columns: First Name, M.I., Last Name, Suffix, External ID, Record Type, Last Modified Date, and Last Modified By. Several contacts are checked, including Nicholas, Sharon, Scott, Brad, Lucy, Cindy, Sheila, and Lori. The bottom of the page shows pagination (Page 1 of 1, 25) and a footer with Privacy, Terms of Use, and copyright information.

<input type="checkbox"/>	First Name	M.I.	Last Name	Suffix	External ID	Record Type	Last Modified Date	Last Modified By
<input checked="" type="checkbox"/>	Nicholas		Allison		MP-0002	Opt-in	2014-01-22 09:33:58 PST	Lucy Kajimoto
<input type="checkbox"/>	Craig		Barrick		8185772201	Employee	2014-01-21 09:27:23 PST	Lucy Kajimoto
<input checked="" type="checkbox"/>	Sharon	M	Bennett		3.22E+18	Employee	2014-01-21 09:27:23 PST	Lucy Kajimoto
<input checked="" type="checkbox"/>	Scott		Colby		8185772220	Employee	2014-01-21 09:27:23 PST	Lucy Kajimoto
<input checked="" type="checkbox"/>	Brad		Currier		8185772321	Employee	2014-01-21 09:27:23 PST	Lucy Kajimoto
<input checked="" type="checkbox"/>	Lucy		Kajimoto		8182309732	Employee	2014-03-11 11:01:24 PDT	Lucy Kajimoto
<input checked="" type="checkbox"/>	Cindy		Kwok		8185772382	Employee	2014-01-21 09:27:23 PST	Lucy Kajimoto
<input checked="" type="checkbox"/>	Sheila		Morgan		8185772219	Employee	2014-01-21 09:27:23 PST	Lucy Kajimoto
<input type="checkbox"/>	Allison		Nicholas		MP-0001	Opt-in	2014-01-22 09:31:15 PST	Lucy Kajimoto
<input checked="" type="checkbox"/>	Lori		Williams		8185772205	Opt-in	2014-01-21 09:27:23 PST	Lucy Kajimoto



## 6 Click Add to Group.

The screenshot shows the Everbridge Contacts page. The 'Contacts' tab is selected in the top navigation bar. Below the navigation bar, there are tabs for 'Contacts', 'Uploads', 'Groups', 'Rules', and 'Scheduling'. The 'Contacts' tab is active, showing a list of contacts. A modal dialog box titled 'Add to Group' is open, displaying a list of groups to select from. The groups listed are: All Contact Groups, Administrators, Castaic School District, Employees, Hart School District, Managers, Newhall School District, and Newhall School District. The 'OK' button is highlighted in orange.

	First Name	M.I.	Last Name	Last Modified Date	Last Modified By
<input checked="" type="checkbox"/>	Nicholas		Allison	2014-01-22 09:33:58 PST	Lucy Kajimoto
<input type="checkbox"/>	Craig		Barrick	2014-01-21 09:27:23 PST	Lucy Kajimoto
<input checked="" type="checkbox"/>	Sharon	M	Bennett	2014-01-21 09:27:23 PST	Lucy Kajimoto
<input checked="" type="checkbox"/>	Scott		Colby	2014-01-21 09:27:23 PST	Lucy Kajimoto
<input checked="" type="checkbox"/>	Brad		Currier	2014-01-21 09:27:23 PST	Lucy Kajimoto
<input checked="" type="checkbox"/>	Lucy		Kajimoto	2014-03-11 11:01:24 PDT	Lucy Kajimoto
<input checked="" type="checkbox"/>	Cindy		Kwok	2014-01-21 09:27:23 PST	Lucy Kajimoto
<input checked="" type="checkbox"/>	Sheila		Morgan	2014-01-21 09:27:23 PST	Lucy Kajimoto
<input type="checkbox"/>	Allison		Nicholas	2014-01-22 09:31:15 PST	Lucy Kajimoto
<input checked="" type="checkbox"/>	Lori		Williams	2014-01-21 09:27:23 PST	Lucy Kajimoto

Page 1 of 25 View 1 - 10 of 10

## 7 Select the group and click OK.

## 8 From the Groups sub-tab, select the group name you just added.



The list of contacts is displayed.

The screenshot shows the Everbridge interface for the 'Castaic School District' group. The top navigation bar includes Dashboard, Universe, Notifications, Incidents, Contacts (active), Reports, Settings, and Access. The 'Contacts' sub-tab is selected, showing a list of contacts. The left-hand panel shows a tree view of contact groups, including Administrators, Castaic School District (selected), Hart School District, Managers, Newhall School District, and Newhall School District. The main panel displays a table of contacts for the 'Castaic School District' group. The table has columns for First Name, M.I., Last Name, External ID, and Record Type. The contacts listed are Nicholas Allison (MP-0002, Opt-in), Sharon Bennett (3.22E+18, Employee), Scott Colby (8185772220, Employee), Brad Currier (8185772321, Employee), Lucy Kajimoto (8182309732, Employee), Cindy Kwok (8185772382, Employee), Sheila Morgan (8185772219, Employee), and Lori Williams (8185772205, Opt-in). The page is on 1 of 25 pages, showing 1 of 8 records.

To rename a group, select the group name from the left-hand panel and click its Pencil icon. Type the edited name and press ENTER.

To delete a group, select the group name from the left-hand panel and click its Trash Bin. Confirm the deletion.

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

### To move contacts from one group to another

- 1 From the Groups sub-tab, select the desired group name.
- 2 In the right-hand pane, select the check boxes of the contacts you want to move from the group.
- 3 Click the button: Move.



The Move to a Different Group dialog is displayed.

The screenshot shows the Everbridge Contacts interface. On the left, a sidebar lists contact groups: All Contact Groups, Administrators, Castaic School District (selected), Employees, Hart School District, Managers, Newhall School District, and Newhall School District. The main area displays the 'Castaic School District' group with a list of contacts. A 'Move' button is visible above the list. A dialog box titled 'Move to a different Group' is open, showing a 'Select Group' dropdown menu with the following options: All Contact Groups, Administrators, Castaic School District, Employees, Hart School District, Managers, Newhall School District, and Newhall School District. The 'OK' button is highlighted. The background list of contacts includes Nicholas, Sharon, Scott, Brad, Lucy, Cindy, Sheila, and Lori. The table has columns for First Name, M.I., Last Name, External ID, and Record Type.

First Name	M.I.	Last Name	External ID	Record Type
Nicholas			MP-0002	Opt-in
Sharon			3.22E+18	Employee
Scott			8185772220	Employee
Brad			8185772321	Employee
Lucy			8182309732	Employee
Cindy			8185772382	Employee
Sheila		Morgan	8185772219	Employee
Lori		Williams	8185772205	Opt-in

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

The screenshot shows the Everbridge Contacts interface after the move operation. The 'Castaic School District' group is still selected, but the contacts that were moved are no longer listed. The 'Move' button is now disabled, and a 'Remove' button is visible. The list of contacts now includes Scott, Brad, Lucy, Cindy, Sheila, and Lori. The table has columns for First Name, M.I., Last Name, External ID, and Record Type.

First Name	M.I.	Last Name	External ID	Record Type
Scott		Colby	8185772220	Employee
Brad		Currier	8185772321	Employee
Lucy		Kajimoto	8182309732	Employee
Cindy		Kwok	8185772382	Employee
Sheila		Morgan	8185772219	Employee
Lori		Williams	8185772205	Opt-in



The selected contacts are moved to the group.

The screenshot shows the Everbridge web interface. The top navigation bar includes links for Dashboard, Universe, Notifications, Incidents, Contacts (highlighted), Reports, Settings, and Access. Below this, the 'Contacts' section is active, with sub-tabs for Contacts, Uploads, Groups, Rules, and Scheduling. On the left, a tree view shows the hierarchy of contact groups, with 'Hart School District' selected. The main area displays the 'Hart School District' group details, including a search bar and a table of contacts. The table has columns for First Name, M.I., Last Name, External ID, and Record Type. Five contacts are listed: Nicholas Allison (MP-0002, Opt-in), Sharon Bennett (3.22E+18, Employee), Scott Colby (8185772220, Employee), Cindy Kwok (8185772382, Employee), and Sheila Morgan (8185772219, Employee). The interface also shows a 'Page 1 of 1' indicator and a 'View 1 - 5 of 5' button.

<input type="checkbox"/>	First Name	M.I.	Last Name	External ID	Record Type
<input type="checkbox"/>	Nicholas		Allison	MP-0002	Opt-in
<input type="checkbox"/>	Sharon	M	Bennett	3.22E+18	Employee
<input type="checkbox"/>	Scott		Colby	8185772220	Employee
<input type="checkbox"/>	Cindy		Kwok	8185772382	Employee
<input type="checkbox"/>	Sheila		Morgan	8185772219	Employee

### To remove contacts from a group or a group and its sub-groups

- 1 From the Groups sub-tab, select the desired group name.
- 2 In the right-hand pane, select the check boxes of the contacts you want to remove from the group or the group and all its sub-groups.



- 3 From the Remove contacts drop-down list, select either “from group” or “from group and all subgroups”.

The screenshot shows the Everbridge Contacts interface. The top navigation bar includes Dashboard, Universe, Notifications, Incidents, Contacts (active), Reports, Settings, and Access. The left sidebar shows a tree view of contact groups, with 'Castaic School District' selected. The main area displays the 'Castaic School District' group details, including a search bar and a table of contacts. The 'Remove' dropdown menu is open, showing options 'from this Group' and 'from this Group and its subgroups'. Two arrows point to the checkboxes for 'Cindy' and 'Sheila' in the contact list.

<input type="checkbox"/>	First Name	Last Name	External ID	Record Type
<input type="checkbox"/>	Scott	Colby	8185772220	Employee
<input type="checkbox"/>	Brad	Currier	8185772321	Employee
<input type="checkbox"/>	Lucy	Kajimoto	8182309732	Employee
<input checked="" type="checkbox"/>	Cindy	Kwok	8185772382	Employee
<input checked="" type="checkbox"/>	Sheila	Morgan	8185772219	Employee
<input type="checkbox"/>	Lori	Williams	8185772205	Opt-in

Page 1 of 1 25 View 1 - 6 of 6

- 4 Click Yes to confirm you want to delete the records.
- 5 Look at the list of contacts.  
The selected contacts are removed from the group.

The screenshot shows the Everbridge Contacts interface after removing contacts. The 'Castaic School District' group details are still visible, but the contact list now only shows Scott, Brad, Lucy, and Lori. The 'Remove' dropdown menu is still open, showing options 'from this Group' and 'from this Group and its subgroups'.

<input type="checkbox"/>	First Name	M.I.	Last Name	External ID	Record Type
<input type="checkbox"/>	Scott		Colby	8185772220	Employee
<input type="checkbox"/>	Brad		Currier	8185772321	Employee
<input type="checkbox"/>	Lucy		Kajimoto	8182309732	Employee
<input type="checkbox"/>	Lori		Williams	8185772205	Opt-in

Page 1 of 1 25 View 1 - 4 of 4





# Rules

When you send a notification, you can apply a rule based on characteristics of the contact who will receive the message. Rules can be added on Name, Location, Contact Paths, and the other contact data fields.

Rules are a dynamic way of selecting contacts using multiple filters based on their contact information, such as Name and Address or Additional Information, that is custom to your organization. So, even if new contacts have not yet been added to the “Fire Department,” group, they could still be located at a Fire Station address where they are located.

If the data content in a contact record is current, then the rule is up-to-date whenever you send a notification — you do not have to “maintain” the list.

To add dynamic groups, see *To manage dynamic groups* on page 19.

## To add a new rule

- 1 From the Contacts tab, select the Rules sub-tab.

The screenshot displays the Everbridge web interface. At the top, a navigation bar includes icons for Dashboard, Universe, Notifications, Incidents, Contacts (highlighted in red), Reports, Settings, and Access. Below this, the 'Contacts' section is active, with sub-tabs for Contacts, Uploads, Groups, Rules (selected), and Scheduling. A 'Delete' button and an 'Add' button are visible. A search bar is on the right. The main content area is a table with the following data:

<input type="checkbox"/>	Rule Name	Last Modified Date	Last Modified By
<input type="checkbox"/>	Employees in Santa Clarita	2013-09-27 11:47:49 PDT	Lucy Kajimoto
<input type="checkbox"/>	Employees in Glendale	2013-09-19 09:20:53 PDT	Lucy Kajimoto

Below the table, there is a pagination control showing 'Page 1 of 1' and a 'View 1 - 2 of 2' link. The footer contains links for Privacy and Terms of Use, and a copyright notice for 2014 Everbridge, Inc.

**2** Click Add.

**everbridge**

Dashboard Universe Notifications Incidents **Contacts** Reports Settings Access

[Contacts](#) > Add Rule ?

**Rule Name**

\* Name

**Custom Filters**

Field	Condition	Value
Add Filter Search:	Select Field	

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**3** Type a name for your new rule.



- 4 In Custom Filters, select a field from the Add Filter Search drop-down list.

The screenshot shows the 'Add Rule' interface in the Everbridge system. The top navigation bar includes links to Dashboard, Universe, Notifications, Incidents, Contacts (highlighted), Reports, Settings, and Access. The main content area is titled 'Contacts > Add Rule'. Under the 'Rule Name' section, the 'Name' field contains 'Glendale ZIP Code 91203'. The 'Custom Filters' section features a table with columns for Field, Condition, and Value. An 'Add Filter Search:' dropdown menu is open, displaying a list of fields including 'Select Field', 'Linked User', 'Contact External Id', 'Contact First Name', 'Contact Is Geocoded', 'Contact Last Name', 'Contact Middle Initial', 'Contact Country', 'Delivery Method', 'Delivery Method Value', 'Contact Suffix', 'Created On', 'Last Modified By', 'Last Modified On', 'Location Apt/Suite/Unit', 'Location City', 'Location Country', 'Location Name', 'Location Postal Code' (highlighted by the mouse), 'Location State/Province', 'Location Street Address', 'Record Type', 'Registered', 'Registered Email', 'Registered On', 'Associated Group(s)', 'DeliveryMethod-Pager Service', 'Hire Date', 'Company', and 'Department'. Below the dropdown are 'Preview', 'Save', and 'Cancel' buttons. The footer contains links for Privacy and Terms of Use, and a copyright notice for 2014 Everbridge, Inc.



- 5 Select the Condition from the drop-down list and type the Value. In this example, the Location City field must be equal to “Glendale.”

**everbridge**

Dashboard Universe Notifications Incidents **Contacts** Reports Settings Access

[Contacts](#) > Add Rule ?

**Rule Name**

\* Name

**Custom Filters**

Field	Condition	Value
<input type="text" value="Location Postal Code"/>	<input type="text" value="is equal to"/>	<input type="text" value="91203"/>

Add Filter Search:

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- 6 Repeat steps 4 and 5 for each additional filter you need to use.



7 Optionally, click Preview to see the contacts matching your new rule.

**Rule Name**

\* Name

**Custom Filters**

Field	Condition	Value
Location Postal Code	is equal to	91203

Add Filter Search:

[Preview](#) [Save](#) [Cancel](#)

**Preview Results**

First Name	Last Name *	External ID	Record Type	Last Modified Date	Last Modified By
<a href="#">Craig</a>	Barrick	8185772201	Employee	2014-01-21 09:27:23 PST	Lucy Kajimoto
<a href="#">Sharon</a>	Bennett	3 22E+18	Employee	2014-04-02 10:09:00 PDT	Lucy Kajimoto
<a href="#">Scott</a>	Colby	8185772220	Employee	2014-04-02 10:06:54 PDT	Lucy Kajimoto
<a href="#">Brad</a>	Currier	8185772321	Employee	2014-04-02 10:06:54 PDT	Lucy Kajimoto
<a href="#">Cindy</a>	Kwok	8185772382	Employee	2014-04-02 10:14:16 PDT	Lucy Kajimoto

8 Click Save.



The new rule is listed in the Rules list.

The screenshot shows the Everbridge web interface. The top navigation bar includes links for Dashboard, Universe, Notifications, Incidents, Contacts (highlighted in red), Reports, Settings, and Access. Below the navigation bar, the 'Contacts' section is active, with sub-tabs for Contacts, Uploads, Groups, Rules, and Scheduling. The 'Rules' tab is selected, displaying a table of rules. The table has columns for Rule Name, Last Modified Date, and Last Modified By. There are three rules listed: 'Glendale ZIP Code 91203', 'Employees in Santa Clarita', and 'Employees in Glendale'. Each rule has a checkbox and a pencil icon for editing. At the bottom of the table, there is a pagination control showing 'Page 1 of 1' and '25' items per page. A search bar is located at the top right of the table area. The footer of the page includes links for Privacy and Terms of Use, and a copyright notice for 2014 Everbridge, Inc.

<input type="checkbox"/>	Rule Name	Last Modified Date	Last Modified By
<input type="checkbox"/>	Glendale ZIP Code 91203	2014-04-02 10:22:00 PDT	Lucy Kajimoto
<input type="checkbox"/>	Employees in Santa Clarita	2013-09-27 11:47:49 PDT	Lucy Kajimoto
<input type="checkbox"/>	Employees in Glendale	2013-09-19 09:20:53 PDT	Lucy Kajimoto

Page 1 of 1 25 View 1 - 3 of 3

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To edit a rule, click the Pencil icon in the same row. The Update Rule page appears from which you can make changes. Click Save after you have modified your rule.



Dashboard

Universe

Notifications

Incidents

Contacts

Reports

Settings

Access

Contacts > Update Rule

Rule Name

\* Name

Glendale ZIP Code 91203

Custom Filters

Field	Condition	Value
Location Postal Code	is equal to	91203
Add Filter Search:	Select Field	

Preview

Save

Cancel

Privacy

Terms of Use

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To delete a rule, select the check box next to its name, and click the Delete button. Confirm the deletion.

The screenshot shows the Everbridge web interface. The top navigation bar includes links for Dashboard, Universe, Notifications, Incidents, Contacts (highlighted), Reports, Settings, and Access. Below the navigation bar, the 'Contacts' section is active, with tabs for Contacts, Uploads, Groups, Rules, and Scheduling. A 'Delete' button and an 'Add' button are visible. A table lists three rules:

<input type="checkbox"/>	Rule Name	Last Modified Date	Last Modified By
<input checked="" type="checkbox"/>	Glendale ZIP Code 91203	2014-04-02 10:22:00 PDT	Lucy Kajimoto
<input type="checkbox"/>	Employees in Santa Clarita	2013-09-27 11:47:40 PDT	Lucy Kajimoto
<input type="checkbox"/>	Employees in Glendale	2013-09-27 11:47:40 PDT	Lucy Kajimoto

A 'Confirm' dialog box is overlaid on the table, asking 'Are you sure you want to delete this record?' with 'Yes' and 'No' buttons. The 'Yes' button is highlighted. The bottom of the page shows 'View 1 - 3 of 3' and links for Privacy and Terms.





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# Managing Your Contacts

Once the configuration options are completed, you can begin adding contacts to the Everbridge Suite system. Contacts can be added individually or through an upload process. The following sections provide more detail:

- ◇ *Managing Contacts Individually*—To add a new Contact individually, To edit a contact individually, or To remove a contact individually.
- ◇ *Preparing to Upload Contacts*—To upload a list of Contacts using the web-based interface, To submit a Contact data file via Secure FTP, and To see the upload results.

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

## About Contact Data

### General Information

The General Information section of the contact record contains the name and ID information for the contact.

Required fields have a red asterisk (\*) next to the field label.

The External ID must be unique in the organization. The unique ID prevents duplication of records and customizes individuals with the same name. Your organization might use Employee ID numbers or some other plan that contains unique IDs.

Records types in the drop-down list are configured by the administrator for this particular organization.

### Address Information

The Address Information section of the contact record allows you to define up to five locations for each contact. These locations can be used to include the contact in a notification sent using map addresses. Click the link: [Enter Address Information](#).

Location Name can be used when you send a notification; for example, "Work" or "Home." Verify the correct Country is selected. Enter address information, up to the Postal Code field. The system tries to convert this address into a standardized format from the list. Note that the selected address is automatically geo-coded so that you can notify this contact using the map. (See *New Notifications* on page 81 for information about the map.) Add another address link, as needed.

You can remove a location by selecting the Delete icon (X).



## Delivery Methods

The Delivery Methods section of the contact record contains the message delivery information for the contact. This is the section where you configure the device details to deliver a notification to this contact, including phone numbers, email addresses, and so forth. The delivery methods in the list are configured for your organization.

Select a delivery method from the list. For each method, supply a device address. Add more delivery method device addresses for this contact. The more ways that the notification can be delivered means that it is more likely the message will get through as quickly as possible.

- ♦ For email addresses—Use SMTP format. That is, username@domain.
- ♦ For phone numbers—Confirm the Country to ensure the system uses the correct dialing instructions and that the message is sent from the correct location. Then enter only the digits of each phone number.

If the system calls a phone number and reaches an answering machine or voice mail, it will wait a short time for the announcement to play before leaving a message. You can change the default Wait Time if you need more time for the device. Call the line and time how long to wait before starting the message to know the value to type in the Wait Time field.

**NOTE:** To add a Satellite phone to your delivery methods, in Settings > Notifications > Sender Information, use the Country: Inmarsat (Ships At Sea). The system starts the number with an "8" so you do not need to add it to the dialing string. For example, if the complete phone number is "881231234," enter "81231234". The system does a look-up for the Inmarsat country and adds the additional "8" to the beginning of the string.

When a message is sent to this contact, Everbridge tries the delivery methods, one after another, until the contact responds or until it has tried all the methods. The system uses the order of the list. To reorder the delivery methods, use the Up and Down arrows to move them accordingly.

It is a good idea to put text paths, such as SMS and email, higher in the order than voice-based methods. In the event of an emergency, a voice message might be difficult to hear, while a text-based message will be clear.

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

To remove a delivery method, select the Trash Bin.

## Additional Information

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

- ♦ text box, where you type a value
- ♦ date field, where you select a date by clicking the Calendar icon and selecting the date
- ♦ single-select list, where you select one value from the drop-down list
- ♦ multi-select list, where you select one or more values from the drop-down list



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

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

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

To remove Additional Information field, click the Trash Bin.

## Alert Subscriptions

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



# Managing Contacts Individually

Perform the following procedure to add contacts individually.

## To add a new Contact individually

- 1 From the Contacts sub-tab, click Add Contact.  
The Add Contact page appears.

Susan Stoba Test Organization (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe Notifications Incidents **Contacts** Reports Settings Access

Contacts > Add Contact ?

**General information**

\* First Name  \* Last Name

M.I.

Suffix

\* External ID

\* Record Type

Country

**Address Information**

[Enter address](#)

**Delivery Methods**

Everbridge will go down this list, in the order specified here, when attempting to reach this contact.

Order	Delivery Method	Device address	Country
1	1 Way	* someone@example.com Pager Service	
2	Numeric Pager	* 555-555-5555 Pin <input type="text"/> Advanced	* United States

Add a delivery method:

**Additional Information**

Add an Additional Information:

**Alert Subscriptions**

0 Weather Subscription(s)

[Manage Subscriptions](#)

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- 2 Under General information:
  - First Name—Type the first name of the contact and press TAB.
  - Last Name—Type the last name of the contact and press TAB.
  - Middle Initial—Optionally, type the middle initial of the contact and press TAB.
  - Suffix—Optionally, type the suffix for this contact and press TAB.



- External Id—Type the external ID (a unique identifier for Contacts) and press TAB.

**NOTE:** External IDs can include email addresses, telephone numbers, login IDs, employee IDs, or other unique items within your organization.

- Record Type—From the drop-down list, select the record type.
- Country—From the drop-down list, select the Country.

**3** Under Address Information, click the link: Enter address.

- Location Name—Type a name for the location being stored.
- Country—Select the country from the drop-down list.
- Address—Type the street address.
- Apt/Suite/Unit—Type the apartment, suite, or unit, if applicable.
- City—Type the city name.
- State/Province—Select the State from the drop-down list if United States is the country. Type the State/Province name if the country is international.  
The system begins geo-coding the address. The Select Geo Address field allows you to select from a list of locations to which the address matches. If further refinement is needed, add the Postal Code.

**NOTE:** Review the following about geo-coding.

- ◇ You can geo-code any location, domestic or international.
- ◇ You can define up to five addresses for any given contact in the system (such as a place of business, point of interest, home location, spouse's work address, children's schools, and so forth). Do this by clicking the link: Add Another Address.
- ◇ The geo-coding process supports foreign language characters, making geo-coding global locations quick to locate.
- ◇ Each location that is defined for the contact displays on the Universe view.
- ◇ When you enter an address, it could be geo-coded. That is, the latitude and longitude of the address are verified to be a location on earth. If you enter your own latitude and longitude, the geo-coding is not verified.

- Postal Code—Type the postal code of the address.
    - In the United States, type the 5-digit postal code.
    - In Great Britain, type the post code (between 5 and 7 alphanumeric characters with a space before the last 3 alphanumeric characters).
  - Select Address—Select the address from the drop-down list that matches your address.
  - Location—Once a geo-coded address is selected, the Latitude/Longitude information is populated into the corresponding fields.
- 4** Under Delivery Methods, define the contact information for the devices.
- a** Add a delivery method—Select a delivery method from the drop-down list.



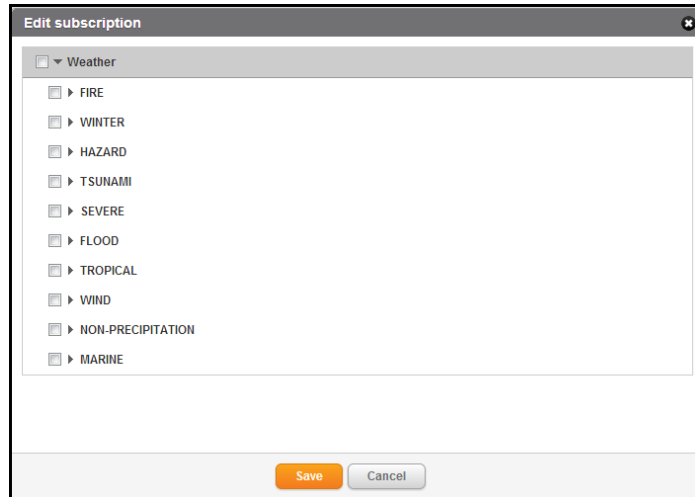
You can configure the delivery methods enabled for your organization, but you do not have to define the contact information for every delivery method. The priority of the devices will be in the order in which they are added/populated in the profile.

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

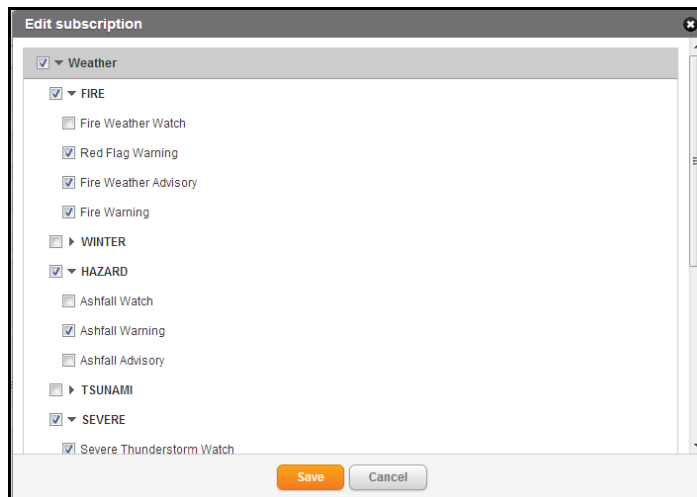
- b** Device address—Type the device address.
  - c** PIN—If a Pager, type the PIN.
  - d** Advanced—Click the Advanced link to see the Pager Service field. Select your pager company from the Pager Service drop-down list. This field is displayed for the following delivery methods: Numeric Pager and Plain Text Email - 1 Way. If you select a Pager Service, then Everbridge sends your messages to the pager company using the Wireless Communication Transfer Protocol (WCTP). If you do not select a Pager Service, then your message is sent to your pager company using the telephone modem (Numeric Pager) or email server (text pagers).
  - e** Repeat steps 4a through 4d for every delivery method you want attempted for this contact.
  - f** Prioritize the delivery methods by using the Up and Down arrows on the right-hand side of the panel.
  - g** Optionally, remove a delivery method from the path by selecting the Trash Bin on the right-hand side of its row.
- 5** Under Additional Information, define the desired information for the contact.
  - a** Additional Information—Select the desired information from the drop-down list.
  - b** Depending on the format, enter the possible value or values.
    - A multi-select list allows you to select from a list of values and click the Right Angle (>) button.
    - A single-select box allows you to select the value.
    - A text box allows you to type free-form text.
  - c** Optionally, remove additional information by selecting the Trash Bin on the right-hand side of its row.
- 6** Under Alert Subscriptions, view and/or modify the contact's subscriptions by clicking the link: Manage Subscriptions.



The Edit Subscription dialog appears.



- a Select the check box for the desired category. This exposes all the alerts in that category. (Alternatively, you can select the Right arrow to display the alerts.)
- b Scroll as needed to see the entire list.
- c Clear check boxes for the alerts that the contact should not have. (Or, if you chose the Right arrow to display the alerts, select the check boxes you want the contact to have.)



- d Click Save.
- 7 Click Save.
- Notice that the Alert Subscriptions pane shows the number of subscriptions.

**Alert Subscriptions**  
129 Weather Subscription(s)  
[Manage Subscriptions](#)



## To edit a contact individually

- 1 From the Contacts tab, select the Pencil icon next to the name of the contact you want to update.  
The Update Contact page appears.

Susan Stoba Test Organization (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe Notifications Incidents **Contacts** Reports Settings Access

Contacts > Update Contact ?

**General information**

\* First Name: Raul \* Last Name: Gonzalez  
M.I.: Username: RGonzalez  
Suffix:  
\* External ID: 7030229025426675666  
\* Record Type: Employee  
Country: Select...

**Record Information**

Created date: 2014-01-27 06:59:32 PST  
Created by: Member Portal  
Last updated date: 2014-01-27 07:11:32 PST  
Last updated by: Member Portal  
Registration success date: 2014-01-27 06:59:33 PST

**Address Information**  
[Enter address](#)

**Delivery Methods**  
Everbridge will go down this list, in the order specified here, when attempting to reach this contact.  
Add a delivery method: Select...

**Additional Information**  
Add an Additional Information: Select...

**Alert Subscriptions**  
175 Weather Subscription(s)  
[Manage Subscriptions](#)

Save Back

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- 2 Update the desired contact information by following steps 2 through 7 in the procedure *To add a new Contact individually* on page 162.





## To remove a contact individually

- 1 From the Contacts tab, select the check box in the row of the contact you want to delete.
- 2 Click Delete.

The screenshot displays the Everbridge 'City of Dreams (All Features - WDT) (Organization Admin)' interface. The 'Contacts' tab is active, showing a list of contacts with columns: First Name, M.I., Last Name, Suffix, External ID, Record Type, Last Modified Date, and Last Modified By. A confirmation dialog box is overlaid on the list, asking 'Are you sure you want to delete this record?' with 'Yes' and 'No' buttons. The contact 'Dave Brown' is selected in the list.

	First Name	M.I.	Last Name	Suffix	External ID	Record Type	Last Modified Date	Last Modified By
<input type="checkbox"/>	Maebv		Bluth		Maebv	Employee	2014-01-25 22:20:54 CST	Leslie Knope
<input type="checkbox"/>	Buster		Bluth		Buster	Employee	2014-05-07 13:22:28 CDT	Leslie Knope
<input type="checkbox"/>	Michael		Bluth			Employee	2014-05-07 13:22:28 CDT	Leslie Knope
<input type="checkbox"/>	Billy		Bob			Employee	2014-05-07 17:04:03 CDT	Member App
<input type="checkbox"/>	Billy		Bob			Employee	2014-05-07 17:03:46 CDT	Member App
<input type="checkbox"/>	Billy		Bob		0130909112420310040	Employee	2014-05-07 17:03:23 CDT	Member App
<input type="checkbox"/>	Billy		Bob		9168779547323181426	Employee	2014-05-07 16:26:42 CDT	Member App
<input type="checkbox"/>	Billy		Bob		2888471844943987261	Employee	2014-05-07 17:04:15 CDT	Member App
<input type="checkbox"/>	Billy		Bob		325805809093964908	Employee	2014-05-07 16:26:58 CDT	Member App
<input checked="" type="checkbox"/>	Dave		Brown		2235641860293310917	Security	2014-04-15 17:00:06 CDT	Leslie Knope
<input type="checkbox"/>	Nelson		Daza		Ndaza	Employee	2013-11-20 17:32:08 CST	Leslie Knope
<input type="checkbox"/>	Robbie		Dee		BDMJ3	Employee	2014-05-08 10:06:44 CDT	Martello Jones
<input type="checkbox"/>	Android		Device		Android	Employee	2014-04-14 14:07:45 CDT	Leslie Knope

- 3 Click Yes to confirm the deletion.



## Preparing to Upload Contacts

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

Highlights of uploading are:

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

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

No matter whether the file is uploaded automatically or uploaded manually, the fields in the file must use the correct format for the data. You can download the latest from the Client Portal to help you ensure your data is in the correct format. You can also download the template directly from the Contacts tab.

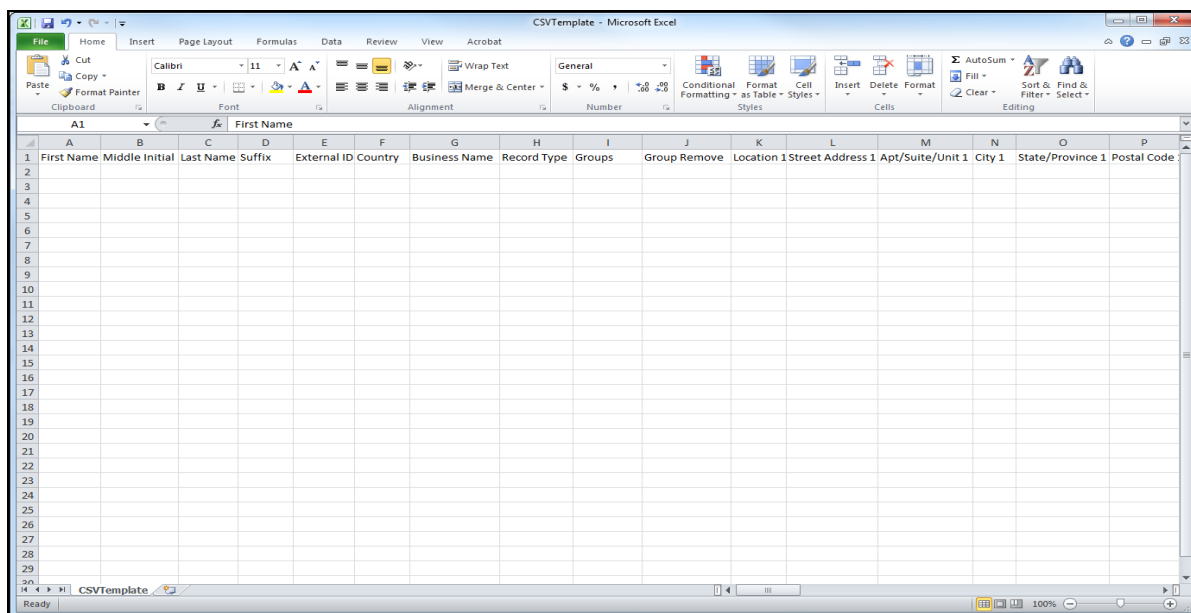
The file you upload must be a CSV (Comma-Separated Value) file. In a CSV file, the data fields are separated by commas. The first row of the file contains the names of the data fields. You must make sure that there are no extra characters in any line or lines in the file.

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

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



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



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

**TIP:** If you are unable to preserve the leading zero in the Postal Code column when exporting the data from your system of record, then use the Microsoft Excel cell formatting feature found in "Format Cells > Special > ZIP Code".

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

## Data Dictionary

The following table provides details about the column headings, from left to right, in the Data Dictionary (also known as the CSV Template). The column headings must not be changed! If you use your own spreadsheet, make sure your column headings use the exact case-sensitive spelling and spaces.

Column Heading	Required	Data Type	Comments
Organization Name	N	String	<ul style="list-style-type: none"> <li>For only Account Administrators using the Account, in one CSV file, add contacts across different organizations. This must be the first column.</li> <li>Maximum characters: 40</li> </ul>



Column Heading	Required	Data Type	Comments
First Name	Y	String	<ul style="list-style-type: none"><li>When adding contacts to an Organization, this must be the first column.</li><li>Maximum characters: 40</li></ul>
Middle Initial	N	String	Maximum characters: 1
Last Name	Y	String	Maximum characters: 40
Suffix	N	String	Maximum characters: 10
External ID	Y	String	<ul style="list-style-type: none"><li>Maximum characters: 50</li><li>Must be unique in the organization</li></ul>
Country	N	String	<ul style="list-style-type: none"><li>Must be ISO-2 character or the full name of the country</li><li>This is the primary country for the contact</li></ul>
Business Name	N	String	Maximum characters: 100
Record Type	Y	String	Must exist in the list <b>NOTE:</b> Make sure to set up your Record Types in the portal before uploading contact data.
Groups	N	String	<ul style="list-style-type: none"><li>Maximum characters: 260 per group name</li><li>The Groups column cannot be repeated. All groups assigned to the contact must be in this cell. You can have an unlimited number of groups.</li></ul> <p><b>NOTE:</b> If you use a tool to edit the CSV file, that tool might have its own limitations for the number of characters that can be in one cell (for example, the maximum characters per cell when using Microsoft Excel is 32,767 characters); however, if you use a text editor to edit the CSV file, there are no limitations.</p> <ul style="list-style-type: none"><li>Can contain one or more group names. Each group name cannot be longer than 260 characters. Separate group names using the pipe ( ) character. For example, for contact Bob Smith, his Groups cell contains the following: <b>Floor 2  Nurse</b>. Bob Smith becomes a member of these two groups.</li><li>When performing an update, add a contact to a group, but never remove them from existing groups when an asterisk (*) is placed in front of the first pipe. For example, contact Sue Jones is already part of the CodeBlue group. Her Groups cell contains the following: <b>* Floor 1 ER Doctor</b>. Sue Jones is now a member of three groups.</li></ul> <p><b>NOTE:</b> The contact is removed from any groups you do not list or if you do not use the asterisk and pipe character as the first characters in the Groups column.</p>



Column Heading	Required	Data Type	Comments
Group Remove	N	String	<ul style="list-style-type: none"> <li>When using the <b>Group Remove</b> column, make sure you remove the <b>Groups</b> column from the CSV file.</li> <li>To remove a contact from a group, enter the group name. Separate group names using the pipe ( ) character. For example, to remove a contact from the "Employees" group, in the <b>Group Remove</b> column, type: <b>Employees</b>.</li> <li>To remove a contact from a group and its subgroups, enter an exclamation point (!) and the group name. Separate group names using the pipe ( ) character. For example, to remove a contact from the "Parents" group (and any nested groups under it), in the <b>Group Remove</b> column, type: <b>!Parents</b>.</li> </ul> <p><b>NOTE:</b> If a group name begins with an exclamation point (!), such as <b>!GroupA</b>, then you must use two exclamation marks (for example, <b>!!GroupA</b>) to remove a contact from the group and nested groups. Otherwise, the application searches for "GroupA" and will not find <b>!GroupA</b>.</p>
Location 1	N	String	<ul style="list-style-type: none"> <li>Maximum characters: 50</li> <li>Must be unique per contact</li> </ul> <p><b>NOTE:</b> When updating, use the same Location # name to replace the location information. For example, to update the "Home" address, you must specify "Home" as the location name. If you change the Location # name, it adds the information and moves the original location information to the next Location #.</p>
Street Address 1	N	String	Maximum characters: 100
Apt/Suite/Unit 1	N	String	Maximum characters: 10
City 1	N	String	Maximum characters: 40
State/Province 1	N	String	Maximum characters: 40
Postal Code 1	N	String	<ul style="list-style-type: none"> <li>Maximum characters: 10</li> <li>If Country X is "United States" or "US", then valid formats are: 99999; 99999-9999; 999999999</li> <li>If Country X is not "United States" or "US", then the value can be any format</li> </ul>
Country 1	N	String	Must exist in the list
Latitude 1	N	Decimal	<ul style="list-style-type: none"> <li>Minimum value: -90</li> <li>Maximum value: 90</li> <li>If no latitude/longitude is entered, the system automatically attempts to geo-code</li> </ul>
Longitude 1	N	Decimal	<ul style="list-style-type: none"> <li>Minimum value: -180</li> <li>Maximum value: 180</li> <li>If no latitude/longitude is entered, the system automatically attempts to geo-code</li> </ul>



Column Heading	Required	Data Type	Comments
Location 2	N	String	<ul style="list-style-type: none"><li>Maximum characters: 50</li><li>Must be unique per contact</li></ul> <b>NOTE:</b> When updating, use the same Location # name to replace the location information. For example, to update the "Home" address, you must specify "Home" as the location name. If you change the Location # name, it adds the information and moves the original location information to the next Location #.
Street Address 2	N	String	Maximum characters: 100
Apt/Suite/Unit 2	N	String	Maximum characters: 10
City 2	N	String	Maximum characters: 40
State/Province 2	N	String	Maximum characters: 40
Postal Code 2	N	String	<ul style="list-style-type: none"><li>Maximum characters: 10</li><li>If Country X is "United States" or "US", then valid formats are: 99999; 99999-9999; 999999999</li><li>If Country X is not "United States" or "US", then the value can be any format</li></ul>
Country 2	N	String	Must exist in the list
Latitude 2	N	Decimal	<ul style="list-style-type: none"><li>Minimum value: -90</li><li>Maximum value: 90</li><li>If no latitude/longitude is entered, the system automatically attempts to geo-code</li></ul>
Longitude 2	N	Decimal	<ul style="list-style-type: none"><li>Minimum value: -180</li><li>Maximum value: 180</li><li>If no latitude/longitude is entered, the system automatically attempts to geo-code</li></ul>
Location 3	N	String	<ul style="list-style-type: none"><li>Maximum characters: 50</li><li>Must be unique per contact</li></ul> <b>NOTE:</b> When updating, use the same Location # name to replace the location information. For example, to update the "Home" address, you must specify "Home" as the location name. If you change the Location # name, it adds the information and moves the original location information to the next Location #.
Street Address 3	N	String	Maximum characters: 100
Apt/Suite/Unit 3	N	String	Maximum characters: 10
City 3	N	String	Maximum characters: 40
State/Province 3	N	String	Maximum characters: 40
Postal Code 3	N	String	<ul style="list-style-type: none"><li>Maximum characters: 10</li><li>If Country X is "United States" or "US", then valid formats are: 99999; 99999-9999; 999999999</li><li>If Country X is not "United States" or "US", then the value can be any format</li></ul>
Country 3	N	String	Must exist in the list



Column Heading	Required	Data Type	Comments
Latitude 3	N	Decimal	<ul style="list-style-type: none"> <li>Minimum value: -90</li> <li>Maximum value: 90</li> <li>If no latitude/longitude is entered, the system automatically attempts to geo-code</li> </ul>
Longitude 3	N	Decimal	<ul style="list-style-type: none"> <li>Minimum value: -180</li> <li>Maximum value: 180</li> <li>If no latitude/longitude is entered, the system automatically attempts to geo-code</li> </ul>
Location 4	N	String	<ul style="list-style-type: none"> <li>Maximum characters: 50</li> <li>Must be unique per contact</li> </ul> <p><b>NOTE:</b> When updating, use the same Location # name to replace the location information. For example, to update the "Home" address, you must specify "Home" as the location name. If you change the Location # name, it adds the information and moves the original location information to the next Location #.</p>
Street Address 4	N	String	Maximum characters: 100
Apt/Suite/Unit 4	N	String	Maximum characters: 10
City 4	N	String	Maximum characters: 40
State/Province 4	N	String	Maximum characters: 40
Postal Code 4	N	String	<ul style="list-style-type: none"> <li>Maximum characters: 10</li> <li>If Country X is "United States" or "US", then valid formats are: 99999; 99999-9999; 999999999</li> <li>If Country X is not "United States" or "US", then the value can be any format</li> </ul>
Country 4	N	String	Must exist in the list
Latitude 4	N	Decimal	<ul style="list-style-type: none"> <li>Minimum value: -90</li> <li>Maximum value: 90</li> <li>If no latitude/longitude is entered, the system automatically attempts to geo-code</li> </ul>
Longitude 4	N	Decimal	<ul style="list-style-type: none"> <li>Minimum value: -180</li> <li>Maximum value: 180</li> <li>If no latitude/longitude is entered, the system automatically attempts to geo-code</li> </ul>
Location 5	N	String	<ul style="list-style-type: none"> <li>Maximum characters: 50</li> <li>Must be unique per contact</li> </ul> <p><b>NOTE:</b> When updating, use the same Location # name to replace the location information. For example, to update the "Home" address, you must specify "Home" as the location name. If you change the Location # name, it adds the information and moves the original location information to the next Location #.</p>
Street Address 5	N	String	Maximum characters: 100
Apt/Suite/Unit 5	N	String	Maximum characters: 10
City 5	N	String	Maximum characters: 40
State/Province 5	N	String	Maximum characters: 40



Column Heading	Required	Data Type	Comments
Postal Code 5	N	String	<ul style="list-style-type: none"><li>Maximum characters: 10</li><li>If Country X is "United States" or "US", then valid formats are: 99999; 99999-9999; 999999999</li><li>If Country X is not "United States" or "US", then the value can be any format</li></ul>
Country 5	N	String	Must exist in the list
Latitude 5	N	Decimal	<ul style="list-style-type: none"><li>Minimum value: -90</li><li>Maximum value: 90</li><li>If no latitude/longitude is entered, the system automatically attempts to geo-code</li></ul>
Longitude 5	N	Decimal	<ul style="list-style-type: none"><li>Minimum value: -180</li><li>Maximum value: 180</li><li>If no latitude/longitude is entered, the system automatically attempts to geo-code</li></ul>
Extension Phone 1	N	Decimal	4-20 digits If delivery method Country is in the list of NANP (North American Numbering Plan) countries, then the phone number must be 10-digits and cannot start with 911, 976, 411, 011, 900, 611, 000 If Country code is not 1, phone length can be 4-20 digits
Extension 1	N	String	<ul style="list-style-type: none"><li>Maximum value: 10 digits</li><li>Number only; no commas, asterisks, or pound/hash (#) symbol</li><li>Can remain empty</li></ul>
Extension Phone Country 1	N	String	Must exist in the list International calling code, 2-character ISO country code, or full ISO country name from ISO 3166-1
Extension Phone 2	N	Decimal	4-20 digits If delivery method Country is in the list of NANP (North American Numbering Plan) countries, then the phone number must be 10-digits and cannot start with 911, 976, 411, 011, 900, 611, 000 If Country code is not 1, phone length can be 4-20 digits
Extension 2	N	String	<ul style="list-style-type: none"><li>Maximum value: 10 digits</li><li>Number only; no commas, asterisks, or pound/hash (#) symbol</li><li>Can remain empty</li></ul>
Extension Phone Country 2	N	String	Must exist in the list International calling code, 2-character ISO country code, or full ISO country name from ISO 3166-1
Extension Phone 3	N	Decimal	4-20 digits If delivery method Country is in the list of NANP (North American Numbering Plan) countries, then the phone number must be 10-digits and cannot start with 911, 976, 411, 011, 900, 611, 000 If Country code is not 1, phone length can be 4-20 digits





Column Heading	Required	Data Type	Comments
Extension 3	N	String	<ul style="list-style-type: none"> <li>Maximum value: 10 digits</li> <li>Number only; no commas, asterisks, or pound/hash (#) symbol</li> <li>Can remain empty</li> </ul>
Extension Phone Country 3	N	String	Must exist in the list International calling code, 2-character ISO country code, or full ISO country name from ISO 3166-1
Extension Phone 4	N	Decimal	4-20 digits If delivery method Country is in the list of NANP (North American Numbering Plan) countries, then the phone number must be 10-digits and cannot start with 911, 976, 411, 011, 900, 611, 000 If Country code is not 1, phone length can be 4-20 digits
Extension 4	N	String	<ul style="list-style-type: none"> <li>Maximum value: 10 digits</li> <li>Number only; no commas, asterisks, or pound/hash (#) symbol</li> <li>Can remain empty</li> </ul>
Extension Phone Country 4	N	String	Must exist in the list International calling code, 2-character ISO country code, or full ISO country name from ISO 3166-1
Extension Phone 5	N	Decimal	4-20 digits If delivery method Country is in the list of NANP (North American Numbering Plan) countries, then the phone number must be 10-digits and cannot start with 911, 976, 411, 011, 900, 611, 000 If Country code is not 1, phone length can be 4-20 digits
Extension 5	N	String	<ul style="list-style-type: none"> <li>Maximum value: 10 digits</li> <li>Number only; no commas, asterisks, or pound/hash (#) symbol</li> <li>Can remain empty</li> </ul>
Extension Phone Country 5	N	String	Must exist in the list International calling code, 2-character ISO country code, or full ISO country name from ISO 3166-1
Phone 1	N	Decimal	4-20 digits If delivery method Country is in the list of NANP (North American Numbering Plan) countries, then the phone number must be 10-digits and cannot start with 911, 976, 411, 011, 900, 611, 000
Phone Country 1	N	String	Must exist in the list
Phone 2	N	Decimal	4-20 digits If delivery method Country is in the list of NANP (North American Numbering Plan) countries, then the phone number must be 10-digits and cannot start with 911, 976, 411, 011, 900, 611, 000
Phone Country 2	N	String	Must exist in the list
Phone 3	N	Decimal	4-20 digits If delivery method Country is in the list of NANP (North American Numbering Plan) countries, then the phone number must be 10-digits and cannot start with 911, 976, 411, 011, 900, 611, 000
Phone Country 3	N	String	Must exist in the list



Column Heading	Required	Data Type	Comments
Phone 4	N	Decimal	4-20 digits If delivery method Country is in the list of NANP (North American Numbering Plan) countries, then the phone number must be 10-digits and cannot start with 911, 976, 411, 011, 900, 611, 000
Phone Country 4	N	String	Must exist in the list
Phone 5	N	Decimal	4-20 digits If delivery method Country is in the list of NANP (North American Numbering Plan) countries, then the phone number must be 10-digits and cannot start with 911, 976, 411, 011, 900, 611, 000
Phone Country 5	N	String	Must exist in the list
Phone 6	N	Decimal	4-20 digits If delivery method Country is in the list of NANP (North American Numbering Plan) countries, then the phone number must be 10-digits and cannot start with 911, 976, 411, 011, 900, 611, 000
Phone Country 6	N	String	Must exist in the list
Email Address 1	N	String	♦ Maximum characters: 80 ♦ Must be in SMPT format ( <i>username@domain.xxx</i> )
Email Address 2	N	String	♦ Maximum characters: 80 ♦ Must be in SMPT format ( <i>username@domain.xxx</i> )
Email Address 3	N	String	♦ Maximum characters: 80 ♦ Must be in SMPT format ( <i>username@domain.xxx</i> )
Plain Text Email - 1-way	N	String	♦ Maximum characters: 80 ♦ Must be in SMPT format ( <i>username@domain.xxx</i> )
Plain Text Email - 1-way Pager Service	N	String	♦ Enter a valid pager company name: <b>American Messaging - MyAirMail</b> , <b>American Messaging - Skytel</b> , or <b>USA Mobility</b> . The pager service name is not case-sensitive, but ensure you type the identical characters (and spaces, if needed). ♦ Contact American Messaging if you do not know the network for your pagers. ♦ The Pager Service must be in the list of valid Pager Service names. Invalid Pager Service names are not loaded even though the contact information for the pager is loaded into the contact record. All other validation rules do not change.
Plain Text Email - 2-way	N	String	♦ Maximum characters: 80 ♦ Must be in SMPT format ( <i>username@domain.xxx</i> )
SMS 1	N	Number	4-20 digits
SMS 1 Country	N	String	Must exist in the list Numeric international calling code, ISO 2-character code, or full Country name
SMS 2	N	Number	4-20 digits
SMS 2 Country	N	String	Must exist in the list Numeric international calling code, ISO 2-character code, or full Country name
FAX 1	N	Number	4-20 digits



Column Heading	Required	Data Type	Comments
FAX 1 Country	N	String	Must exist in the list Numeric international calling code, ISO 2-character code, or full Country name
FAX 2	N	Number	4-20 digits
FAX 2 Country	N	String	Must exist in the list Numeric international calling code, ISO 2-character code, or full Country name
FAX 3	N	Number	4-20 digits
FAX 3 Country	N	String	Must exist in the list Numeric international calling code, ISO 2-character code, or full Country name
TTY 1	N	Number	10 digits
TTY Country 1	N	String	TTY Country must be "1", "US", "CA", "United States" or "Canada" Numeric international calling code, ISO 2-character code, or full Country name
TTY 2	N	Number	10 digits
TTY Country 2	N	String	TTY Country must be "1", "US", "CA", "United States" or "Canada" Numeric international calling code, ISO 2-character code, or full Country name
TTY 3	N	Number	10 digits
TTY Country 3	N	String	TTY Country must be "1", "US", "CA", "United States" or "Canada" Numeric international calling code, ISO 2-character code, or full Country name
Numeric Pager	N	Number	10 digits
Numeric Pager Country	N	String	Must exist in list Numeric international calling code, ISO 2-character code, or full Country name
Numeric Pager Pin	N	Number	Maximum 10 digits
Numeric Pager Service	N	String	<ul style="list-style-type: none"> <li>Enter a valid pager company name: <b>American Messaging - MyAirMail</b>, <b>American Messaging - Skytel</b>, or <b>USA Mobility</b>. The pager service name is not case-sensitive, but ensure you type the identical characters (and spaces, if needed).</li> <li>Contact American Messaging if you do not know the network for your pagers.</li> <li>The Pager Service must be in the list of valid Pager Service names. Invalid Pager Service names are not loaded even though the contact information for the pager is loaded into the contact record. All other validation rules do not change.</li> </ul>
TAP Pager	N	Number	10 digits
TAP Pager Country	N	String	Must exist in list Numeric international calling code, ISO 2-character code, or full Country name



Column Heading	Required	Data Type	Comments
TAP Pager Pin	N	Number	Maximum 10 digits
One Way SMS	N	Number	4-20 digits
One Way SMS Country	N	StringHil	Must exist in the list Numeric international calling code, ISO 2-character code, or full Country name
Custom Field 1	N	String	♦ Name Maximum characters: 40 ♦ Must exist in the list
Custom Value 1	N	String, Date, or Decimal	♦ Value Maximum characters: 260
Custom Field 2	N	String	♦ Name Maximum characters: 40 ♦ Must exist in the list
Custom Value 2	NTha	String, Date, or Decimal	♦ Value Maximum characters: 260
Custom Field 3	N	String	♦ Name Maximum characters: 40 ♦ Must exist in the list
Custom Value 3	N	String, Date, or Decimal	♦ Value Maximum characters: 260
Custom Field 4	N	String	♦ Name Maximum characters: 40 ♦ Must exist in the list
Custom Value 4	N	String, Date, or Decimal	♦ Value Maximum characters: 260
Custom Field 5	N	String	♦ Name Maximum characters: 40 ♦ Must exist in the list
Custom Value 5	N	String, Date, or Decimal	♦ Value Maximum characters: 260
Custom Field 6	N	String	♦ Name Maximum characters: 40 ♦ Must exist in the list
Custom Value 6	N	String, Date, or Decimal	♦ Value Maximum characters: 260
Custom Field 7	N	String	♦ Name Maximum characters: 40 ♦ Must exist in the list
Custom Value 7	N	String, Date, or Decimal	♦ Value Maximum characters: 260
Custom Field 8	N	String	♦ Name Maximum characters: 40 ♦ Must exist in the list
Custom Value 8	N	String, Date, or Decimal	♦ Value Maximum characters: 260
Custom Field 9	N	String	♦ Name Maximum characters: 40 ♦ Must exist in the list
Custom Value 9	N	String, Date, or Decimal	♦ Value Maximum characters: 260



Column Heading	Required	Data Type	Comments
END	N	String	Although not required, it is a recommended technique to include "END" at the end of every row. (In a spreadsheet, it is the last column heading.)

### To prepare your CSV data file

- 1 From the Contacts tab, click the Uploads sub-tab.
- 2 Click Download Template.  
Depending on your browser, the following message might appear: What do you want to do with CSVTemplate.csv (or account\_contactCSV for Account Administrators to add contacts across organizations)?

The screenshot shows the Everbridge web interface. The top navigation bar includes Dashboard, Universe, Notifications, Incidents, Contacts (selected), Reports, Settings, and Access. The main content area is titled 'Contacts' and has sub-tabs for Contacts, Uploads, Groups, Rules, and Scheduling. The 'Uploads' sub-tab is active, showing a table of uploaded files. A 'Download Template' button is visible. A Windows Internet Explorer dialog box is open, asking 'What do you want to do with CSVTemplate.csv?'. The dialog shows the file size as 1.78 KB and the source as portal-ga1.everbridge.net. The options are 'Open', 'Save', and 'Save as'. The 'Save' option is highlighted.

File Name	Batch ID	File Size	Records Received	Records Loaded	Upload Option			
AI13_CA_2.csv	17596481014674	3462	7	7	Update			
CSV_ChangingLocationName.csv	17596481014673	3655	7	7	Update			
AI15_GroupParentRemove_CA.csv	17596481014672	3380	7	7	Update			
AI14_AddCraigGroups.csv	17596481014671	3391	7	7	Update			
AI15_GroupRemove_CA_2.csv	17596481014670	3450	7	7	Update			
AI12_CA.csv	17596481014669	3514	7	7	Update			
AI12_CA.csv	17596481014668	3514	2014-01-21 08:29:47 PST	Lucy Kajimoto	Done	7	7	Update
AI11_CA.csv	17596481014667	3226	2014-01-21 08:25:26 PST	Lucy Kajimoto	Done	7	7	Update
AI11_CA.csv	17596481014666	3234	2014-01-21 08:22:45 PST	Lucy Kajimoto	Done	7	7	Update
AI11_CA.csv	17596481014665	3235	2014-01-21 08:14:37 PST	Lucy Kajimoto	Done	7	7	Update
AI13_CA_2.csv	17596481014338	3462	2013-12-02 07:24:42 PST	Lucy Kajimoto	Done	7	7	Update
AI15_GroupRemove_CA_2.csv	17596481014337	3450	2013-12-02 07:23:43 PST	Lucy Kajimoto	Done	7	7	Update

- 3 Save the file to your desktop.



The CSV template contains the correct column heading names (as described in *Data Dictionary* on page 169).

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	First Name	Middle Initial	Last Name	Suffix	External ID	Country	Business Name	Record Type	Groups	Group Remove	Location 1	Street Address 1	Apt/Suite/Unit 1	City 1	State/Province 1	Postal Code
2																
3																
4																
5																
6																
7																
8																
9																
10																
11																
12																
13																
14																
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29																

4 Review the following about the data file:

- Make sure that the column heading names are exactly as they appear in the template to avoid errors when you upload the file. The column heading names are case-sensitive, so do not change the capitalization.

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

- For some of the sections of the file, the template provides multiple copies of the data columns. For example, the template provides for multiple locations. You can safely delete the extra Location fields to simplify your data file. You can also delete columns from other areas such as Delivery Methods and Custom Fields.
- If you are updating some of the data for a contact, it is unnecessary to use all of the columns. If a column is not in the file, the values for those fields will not be updated. For example, if a contact has completed hazardous materials training, you only need to update his certifications. It is not necessary to include all of the other contact information — those values will remain unchanged.
- To remove a value from a contact during an update, include the column in the upload file, but leave the value cell empty. For example, to remove a delivery method for the contact, leave the column headers in the file but remove the device address information.
- To remove a contact's location by updating, enter the name of the location to remove in the Location Name column, but leave the other cells describing the location empty.



- It is a recommended technique to end each row in the file with "END" to clearly mark the end of the contact record.
  - The required commas are automatically added for you.
- 5 Review the following regarding the Upload directories and expected behavior:
- **Update**—The Update options adds new contact records if the External ID is in the CSV file but not in the database. It updates existing contact records if the External ID exists in the database. This option does not delete any contact records.

**NOTE:** For each data element, make sure to also review the Comments in the *Data Dictionary* on page 169.

## Data Element Category

## Comments

### Personal Information

First Name	Last Name	External ID	Country	Business	Email Type	Storage	Location	Date/Time
John	Doe	123456789	USA	123456789	Employee	123456789	123456789	123456789
Jane	Doe	123456789	USA	123456789	Employee	123456789	123456789	123456789

- ◇ The External ID is the unique identifier for a contact. When you are updating a file, if the External ID does not exist in the database, it adds a record; if the External ID already exists in the database, it updates that record.
- ◇ If two records in your file have the same External ID, the record is updated using the data from the later record. For example, if External ID EB-0004 exists for Larry Hansen in row 4 and Larry Hansen in row 7, the data from row 7 is used.

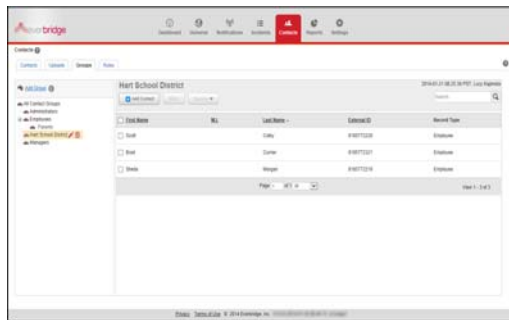
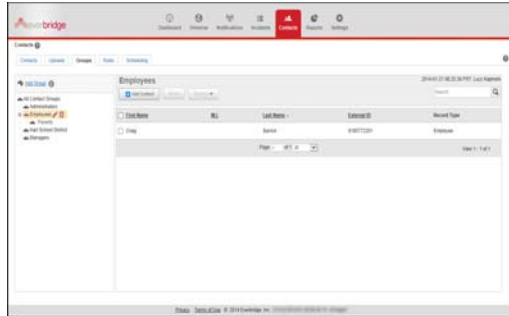
First Name	Last Name	External ID	Business	Email Type	Storage	Location	Date/Time
John	Doe	123456789	Employee	123456789	123456789	123456789	123456789
Jane	Doe	123456789	Employee	123456789	123456789	123456789	123456789

**Data Element Category**

Groups

**Comments**

- ◇ You can add contacts to groups by uploading the group name with the contact. If the contact lists a group that does not exist, the group is added and the contact is added to it. The Groups column can only hold a simple list of group names. That is, you cannot specify the nested structure of groups. To manage the group structure, use the web interface.
- ◇ You cannot delete a group name using a CSV file. To manage the group structure, use the web interface.







## Data Element Category

Groups (continued)

First Name	Last Name	Groups
Sharon	Bennett	Employees Parents
Brad	Currier	* Newhall School District Newhall School District

## Comments

- ❖ The Groups column can contain one or more group names. Each group name cannot be longer than 80 characters. Separate group names using the pipe (|) character. Do not add any spaces before and after the pipe character. For example, for contact Sharon Bennett, her Groups cell contains the following: **Employees|Parents**. Sharon Bennett becomes a member of these two groups.
- ❖ When performing an update, add a contact to a group, but never remove them from existing groups when an asterisk (\*) is placed in front of the first pipe. For example, contact Brad Currier is already part of the Hart School District group. His Groups cell contains the following: **\*|Newhall School District|Newhall School District**. Brad Currier is now a member of three groups.

**NOTE:** The contact is removed from any groups you do not list or if you do not use the asterisk and pipe character as the first characters in the Groups column.

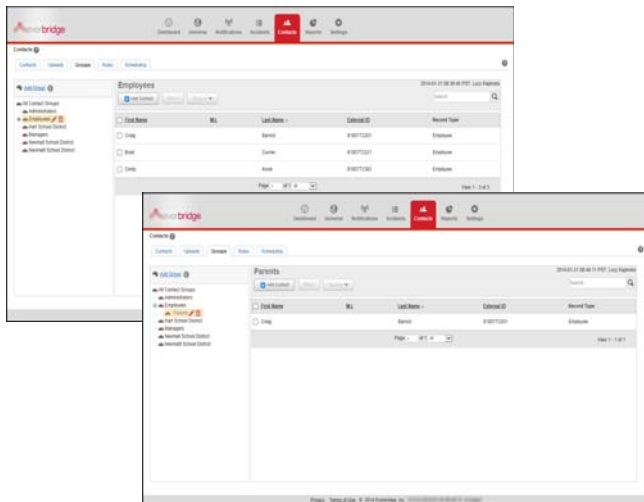
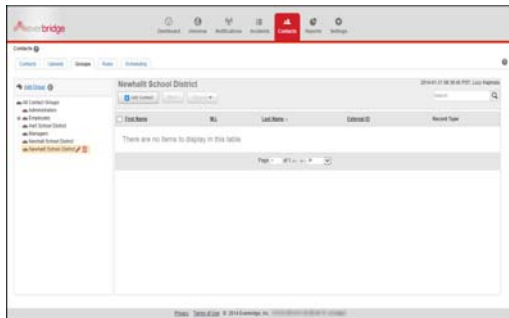
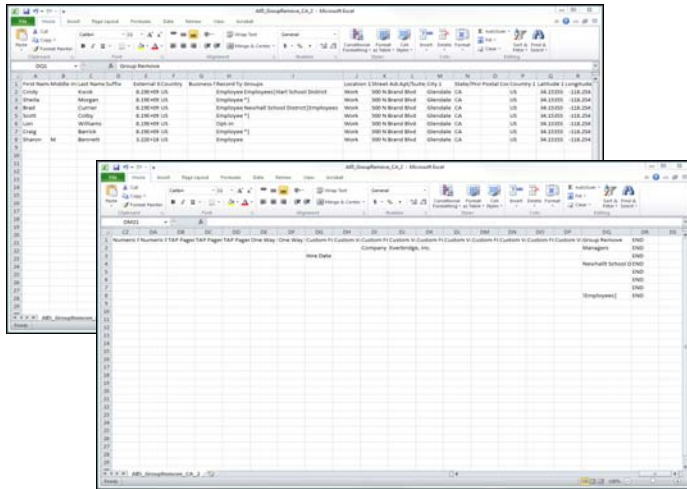
The screenshots show the Everbridge Bridge interface for managing contacts across different school districts:

- Employees:** A list of employees with columns for First Name, Last Name, Email, and Phone. The 'Groups' column is highlighted.
- Parents:** A list of parents with columns for First Name, Last Name, Email, and Phone. The 'Groups' column is highlighted.
- Hart School District:** A list of contacts for Hart School District with columns for First Name, Last Name, Email, and Phone. The 'Groups' column is highlighted.
- Newhall School District:** A list of contacts for Newhall School District with columns for First Name, Last Name, Email, and Phone. The 'Groups' column is highlighted.



## Data Element Category

### Groups (continued)



## Comments

- ♦ To remove a contact from a group, first create a **Group Remove** column anywhere in the CSV file if you are not using the latest template. (In the latest template, the Group Remove column is next to the Groups column.)
- ♦ When using the **Group Remove** column, make sure you remove the **Groups** column from the CSV file.
- ♦ To remove a contact from a group, type the group name in the Group Remove column. Also enter the group names in the Groups column that you want to keep. For example, you would do this to remove Brad Currier from the Newhall School District but keep him as a contact in the Newhall School District and Employees groups. (Alternatively, you can remove the Groups column from the CSV file to keep the groups not listed in the Group Remove column.)
- ♦ To remove a contact from a group and all its nested groups, in the Group Remove column, enter an exclamation point, the group name, and the pipe character to separate one group from another. For example, to remove Sharon Bennett from the “Employees” group and any nested groups under “Employees”, as well as the “Managers” group and any nested groups under “Managers”, type the following:

**!Employees|!Managers**

**Data Element Category****Comments**

Groups (continued)

- ❖ To remove a contact from only the parent group and not its nested groups, in the Groups column, type the subgroup names, each separated by the pipe character. Do not add any spaces before and after the pipe character. Then, in the Group Remove column, type the name of the parent group. For example, to keep the Craig Barrick in the nested Parents subgroup, but remove him from the Employees parent group, type Parents in the Groups column and Employees in the Group Remove column.

Name	Email	Phone	Groups
Craig Barrick	craig.barrick@everbridge.com	555-555-5555	Employees   Parents   Children
John Doe	john.doe@everbridge.com	555-555-5555	Employees
Jane Smith	jane.smith@everbridge.com	555-555-5555	Parents
Bob Johnson	bob.johnson@everbridge.com	555-555-5555	Children

Contact Name	Last Name	First Name	Group
Craig Barrick	Barrick	Craig	Employees
John Doe	Doe	John	Employees
Jane Smith	Smith	Jane	Parents
Bob Johnson	Johnson	Bob	Children



Data Element Category	Comments
Locations	<ul style="list-style-type: none"><li>✦ A contact can have up to five locations, but the location names must be unique for the contact. For example, a contact cannot have two "Home" locations, but can have a "Home" and a "Vacation Home."</li><li>✦ If a contact has an address for a location, but no latitude and longitude, it is automatically geo-coded for you. This makes the contact available to you on the map.</li><li>✦ If you provide latitude and longitude in the data file, the system verifies that they are valid latitude and longitude values. However, it does not verify that these are the correct coordinates for the address. Therefore, if you supply the coordinates, ensure that they are correct.</li><li>✦ To update an address for the location name "Home", for example, simply change the address information for "Home" in the CSV file and upload the CSV file again.</li><li>✦ To replace a Location Name (for example, the value in "Location 1"), modify the CSV file in the following manner:<ul style="list-style-type: none"><li>• Overwrite the original location name with the replacement location name. For example, in the Location 1 column, replace "Work" with "NewWork" and add the Suite number and ZIP code.</li><li>• In a different location (for example, in Location 2), type the original Location 1 value, but leave all of its address fields empty. For example, in Location 2, type the value "Work".</li></ul></li></ul>

To replace a Location Name:



## Data Element Category

## Comments

## Delivery Methods

The screenshot shows the Everbridge contact creation form. The 'Delivery Methods' section is highlighted, showing a list of predefined delivery methods. Below this, there are sections for 'Additional Information' and 'Subscription Fields'.

- ❖ The individual delivery methods in the data file are Delivery Method fields that are predefined for your organization. Enter the name of the value under the corresponding Delivery Method in the CSV file.

**NOTE:** If you enter a value for a Delivery Method not defined for your organization, nothing occurs during the upload process. Unlike Groups and Custom Fields, you cannot enter multiple values in a single Delivery Method. Only the first value is used.

## Custom Fields

The screenshot shows an Excel spreadsheet with a list of contacts. The columns are: Name, Address, City, State, Zip, and Custom Fields. The Custom Fields column contains various values, including 'Fire Warden' and 'CPR-First Aid'.

- ❖ Custom Fields in the data file are Additional Information fields that are predefined for your organization. Enter the name of the field in "Custom Field" and the value of the field in "Custom Value."

**NOTE:** If you do not enter a Custom Field/Custom Value, the Contact Record provides a drop-down list of Additional Information, from which you can manually select one or more from the predefined information fields.

- ❖ If the field is a multiple selection list and this contact has more than one value, enter the values in a string separated by the "pipe" (|) character. Do not add any spaces before and after the pipe character. For example, to list Fire Warden and CPR-First Aid, in the Custom Value field, type the following: **Fire Warden|CPR-First Aid**.

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

The screenshot shows the Everbridge contact creation form. The 'Custom Fields' section is highlighted, showing a list of predefined custom fields and their values. Below this, there are sections for 'Additional Information' and 'Subscription Fields'.



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

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

- **Delete**—The Delete option deletes the contact records from the organization that match the External IDs in the CSV file.
- 6 Fill in the template with your organization's contacts and their corresponding fields.
  - 7 From the CSV template, save the file with a new name (that is, perform a "Save As"). See the following example.

Users-for-doc\_2013-03-05 - Microsoft Excel

FileHomeInsertPage LayoutFormulasDataReviewViewAcrobat

CutCopyFormat Painter

Clipboard

Calibri11



# Uploading a Contact Data File Manually

Perform the following procedure to manually update a Contact data file. Step 4 provides the option for you to add (Update), replace, or remove (Delete) contacts.

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

- 1 From the Contacts tab, click the Uploads sub-tab.

	File Name	Batch ID	File Size	Upload Date	Uploaded By	File Status	Records Received	Records Loaded	Upload Option
<input type="checkbox"/>	AI13_CA_2.csv	17596481014674	3462	2014-01-21 09:27:23 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	CSV_ChangingLocationName.csv	17596481014673	3655	2014-01-21 08:49:50 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	AI15_GroupParentRemove_CA.csv	17596481014672	3380	2014-01-21 08:46:30 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	AI14_AddCraigGroups.csv	17596481014671	3391	2014-01-21 08:44:11 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	AI15_GroupRemove_CA_2.csv	17596481014670	3450	2014-01-21 08:39:22 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	AI12_CA.csv	17596481014669	3514	2014-01-21 08:32:02 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	AI12_CA.csv	17596481014668	3514	2014-01-21 08:29:47 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	AI11_CA.csv	17596481014667	3226	2014-01-21 08:25:26 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	AI11_CA.csv	17596481014666	3234	2014-01-21 08:22:45 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	AI11_CA.csv	17596481014665	3235	2014-01-21 08:14:37 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	AI13_CA_2.csv	17596481014338	3462	2013-12-02 07:24:42 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	AI15_GroupRemove_CA_2.csv	17596481014337	3450	2013-12-02 07:23:43 PST	Lucy Kajimoto	Done	7	7	Update

- 2 Click the button: Upload to portal.



The Upload Contacts dialog appears.

The screenshot shows the Everbridge web interface. The top navigation bar includes Dashboard, Universe, Notifications, Incidents, Contacts (highlighted), Reports, Settings, and Access. The main content area is titled 'Contacts' and has tabs for Contacts, Uploads, Groups, Rules, and Scheduling. The 'Uploads' tab is active, showing a table of uploaded files. A modal dialog titled 'Upload Contacts' is open, prompting the user to 'Choose a file to upload' and providing instructions on file formats and size. The dialog has 'Upload to portal' and 'Cancel' buttons.

	File Name	Batch ID	File Size	Upload Date	Uploaded By	File Status	Records Received	Records Loaded	Upload Option
<input type="checkbox"/>	All3_CA_2.csv	17596481014674	3462	2014-01-21 09:27:23 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	CSV_ChangingLocation Name.csv	17596481014673	368	2014-01-21 08:32:02 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All5_GroupParentRemove_CA.csv	17596481014672	334	2014-01-21 08:25:26 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All4_AddCraigGroups.csv	17596481014671	339	2014-01-21 08:14:37 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All5_GroupRemove_CA_2.csv	17596481014670	345	2014-01-21 08:14:37 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All2_CA.csv	17596481014669	3514	2014-01-21 08:29:47 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All2_CA.csv	17596481014668	3514	2014-01-21 08:29:47 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All1_CA.csv	17596481014667	3226	2014-01-21 08:25:26 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All1_CA.csv	17596481014666	3234	2014-01-21 08:22:45 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All1_CA.csv	17596481014665	3235	2014-01-21 08:14:37 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All3_CA_2.csv	17596481014338	3462	2013-12-02 07:24:42 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All5_GroupRemove_CA_2.csv	17596481014337	3450	2013-12-02 07:23:43 PST	Lucy Kajimoto	Done	7	7	Update

- 3 Click the link: Upload Contacts.  
You can upload a .csv file, tar.gz file, or compressed (.zip) .csv file. The maximum .csv, tar.gz, or .zip file size is 100 MB. When more than 100 MB, use Secure FTP. (See *Uploading a Contact Data File Via Secure FTP* on page 200.)
- 4 Locate your file to upload, and either double-click its filename or select the filename and click Open.





The screenshot shows the Everbridge 'Contacts' management page. At the top, there's a navigation bar with 'Contacts' highlighted. Below it, a sub-navigation bar includes 'Contacts', 'Uploads', 'Groups', 'Rules', and 'Scheduling'. A 'Refresh' button and a 'Download Template' button are also present. The main area contains a table with columns: File Name, Batch ID, File Size, Upload Date, Uploaded By, File Status, Records Received, Records Loaded, and Upload Option. An 'Upload to portal' button is located above the table. An 'Upload Contacts' dialog box is open, showing a file selection area with 'All3\_CA\_2.csv' selected. The dialog offers three options: 'Update' (selected), 'Replace contacts with Record Type', and 'Delete'. Each option has a brief description of its effect on existing records.

	File Name	Batch ID	File Size	Upload Date	Uploaded By	File Status	Records Received	Records Loaded	Upload Option
<input type="checkbox"/>	All3_CA_2.csv	17596481014674	3462	2014-01-21 09:27:23 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	CSV_ChangingLocationName.csv	17596481014673	365				7	7	Update
<input type="checkbox"/>	All5_GroupParentRemove_CA.csv	17596481014672	338				7	7	Update
<input type="checkbox"/>	All4_AddCraigGroups.csv	17596481014671	338				7	7	Update
<input type="checkbox"/>	All5_GroupRemove_CA_2.csv	17596481014670	345				7	7	Update
<input type="checkbox"/>	All2_CA.csv	17596481014669	351				7	7	Update
<input type="checkbox"/>	All2_CA.csv	17596481014668	351				7	7	Update
<input type="checkbox"/>	All1_CA.csv	17596481014667	322				7	7	Update
<input type="checkbox"/>	All1_CA.csv	17596481014666	322				7	7	Update
<input type="checkbox"/>	All1_CA.csv	17596481014665	322				7	7	Update
<input type="checkbox"/>	All3_CA_2.csv	17596481014338	346				7	7	Update
<input type="checkbox"/>	All5_GroupRemove_CA_2.csv	17596481014337	345				7	7	Update
<input type="checkbox"/>	All3_CA_2.csv	17596481014317	346				7	7	Update

5 Select one of the following directories:

- **Update**  
Insert new contact records and update existing contact records. No contact records are deleted from your organization.
- **Replace**  
Replace all the contact record types for your organization with the records in this file that match the record type. Existing contacts with matching record types and External ID are updated. (All contacts matching the contact record type but are excluded from this file will be permanently deleted.)
- **Delete**  
Permanently delete all the contact records for your organization included in this file.

6 To process the file, click the button: Upload to portal.



An Alert message is displayed.

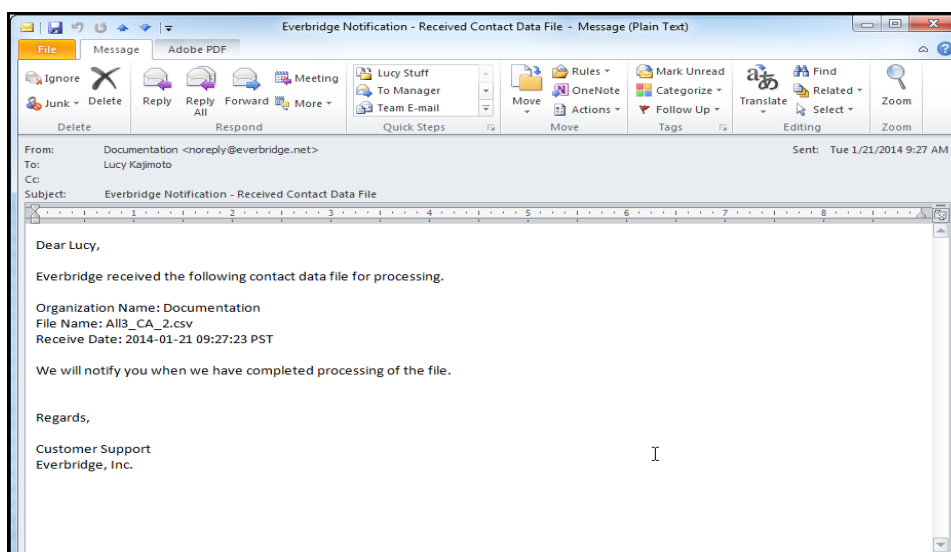
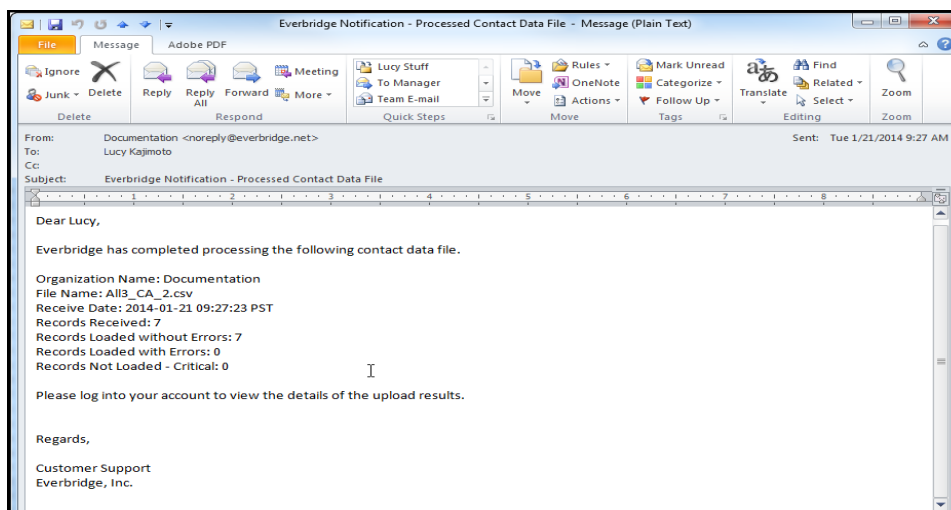
The screenshot shows the Everbridge Contacts page. The top navigation bar includes Dashboard, Universe, Notifications, Incidents, Contacts (active), Reports, and Settings. The main content area has tabs for Contacts, Uploads, Groups, Rules, and Scheduling. Below these are buttons for Refresh, Download Template, and Upload to portal. A table lists contact data with columns: File Name, Batch ID, File Size, Upload Date, Uploaded By, File Status, Records Received, Records Loaded, and Upload Option. An alert message is displayed over the table, stating: "Alert: We have started uploading your file. You should receive an email informing you when it is finished processing." with an OK button.

	File Name	Batch ID	File Size	Upload Date	Uploaded By	File Status	Records Received	Records Loaded	Upload Option
<input type="checkbox"/>	All3_CA_2.csv	17596481014674	3462	2014-01-21 09:27:23 PST	Lucy Kajimoto	In Progress	0	0	Update
<input type="checkbox"/>	CSV_ChangingLocationName.csv	17596481014673	3655	2014-01-21 08:49:50 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All5_GroupParentRemove_CA.csv	17596481014672	3380		Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All4_AddCraigGroups.csv	17596481014671	3391		Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All5_GroupRemove_CA_2.csv	17596481014670	3450		Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All2_CA.csv	17596481014669	3514	2014-01-21 08:32:02 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All2_CA.csv	17596481014668	3514	2014-01-21 08:29:47 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All1_CA.csv	17596481014667	3226	2014-01-21 08:25:26 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All1_CA.csv	17596481014666	3234	2014-01-21 08:22:45 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All1_CA.csv	17596481014665	3235	2014-01-21 08:14:37 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All3_CA_2.csv	17596481014338	3462	2013-12-02 07:24:42 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All5_GroupRemove_CA_2.csv	17596481014337	3450	2013-12-02 07:23:43 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All3_CA_2.csv	17596481014317	3462	2013-11-25 11:09:47 PST	Lucy Kajimoto	Done	7	7	Update

7 Click OK.

You are sent two automated emails:

- one that the contact data file was received.
- another that the contact data file has been processed.



There are three stages in file processing contact data.

- In Progress—The records are updated or inserted in the database.
- Geo-coding—Addresses with no latitude and longitude are processed to add the location; otherwise, if already done, no geo-coding occurs. It could take a while to process the geo-coding. The contacts that are not map-based are available for notification. Once geo-coding is complete, contacts can be selected from the map.
- Done—The system sends an email. In addition, when the upload is complete, the map tiles for the contact layers are refreshed if you loaded addresses for contacts.

**NOTE:** You can click the Cancel icon to cancel the upload. During the In Progress stage, only data before the cancel is saved. During the Geo-coding stage, only the addresses are saved, but not their corresponding longitudes or latitudes.



- 8 Verify/preview the uploaded contacts. See the following procedure, *To see the upload results*.

### To see the upload results

- 1 From the Contacts tab, click the Uploads sub-tab.  
At the Organization level, the list of uploads is displayed.

<div> <div> Dashboard Universe Notifications Incidents <b>Contacts</b> Reports Settings </div> </div>									
<div> <div>Contacts</div> <div> <div>Uploads</div> <div>Groups</div> <div>Rules</div> <div>Scheduling</div> </div> </div>									
<div> <div>Refresh</div> <div>Download Template</div> <div>Upload to portal</div> </div>									
<input type="checkbox"/>	File Name	Batch ID	File Size	Upload Date	Uploaded By	File Status	Records Received	Records Loaded	Upload Option
<input type="checkbox"/>	All3_CA_2.csv	17596481014674	3462	2014-01-21 09:27:23 PST	Lucy Kajimoto	In Progress	0	0	Update
<input type="checkbox"/>	CSV_ChangingLocationName.csv	17596481014673	3655	2014-01-21 08:49:50 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All5_GroupParentRemove_CA.csv	17596481014672	3380	2014-01-21 08:46:30 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All4_AddCraigGroups.csv	17596481014671	3391	2014-01-21 08:44:11 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All5_GroupRemove_CA_2.csv	17596481014670	3450	2014-01-21 08:39:22 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All2_CA.csv	17596481014669	3514	2014-01-21 08:32:02 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All2_CA.csv	17596481014668	3514	2014-01-21 08:29:47 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All1_CA.csv	17596481014667	3226	2014-01-21 08:25:26 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All1_CA.csv	17596481014666	3234	2014-01-21 08:22:45 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All1_CA.csv	17596481014665	3235	2014-01-21 08:14:37 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All3_CA_2.csv	17596481014338	3462	2013-12-02 07:24:42 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All5_GroupRemove_CA_2.csv	17596481014337	3450	2013-12-02 07:23:43 PST	Lucy Kajimoto	Done	7	7	Update
<input type="checkbox"/>	All3_CA_2.csv	17596481014317	3462	2013-11-25 11:09:47 PST	Lucy Kajimoto	Done	7	7	Update

**NOTE:** Check the File Status column. A status of *Failed* means no records were received or loaded from the file. (Failed uploads can occur because File Encryption is ON. Turn OFF File Encryption and upload again.)



At the Account level, click the plus sign (+) next to the file containing the list of contacts from different organizations.

ACCOUNT: New US SQA Account (Account Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

everbridge

Notifications Contacts Users Roles Settings

Contact Upload

Refresh Download Template Upload to portal

ID	File Name	File Size	Upload Date	Uploaded By	Error Message	
224304667033800	qa1_upload.csv	2748	2013-08-19 13:50:55 PDT	Rod Lemmon	UPLOAD_FILE_DECRYPT_FAIL:	
224304667033799	qa1_upload.csv	2748	2013-08-19 13:50:24 PDT	Rod Lemmon	UPLOAD_FILE_DECRYPT_FAIL:	
- 224304667033695	Contacts_ForAccount_QA1.csv	2890	2013-06-12 10:59:13 PDT	Yelena Petrova		
L						
Batch ID	Organization Name	File Size	File Status	Records Received	Records Loaded	Upload Option
21998822490148	Yelena Petrova Test Org	2963	Done	3	3	Update
17596481012157	US_QA_Regression1	2978	Done	3	3	Update
224304667033668	test file.csv	8860	2013-05-10 13:33:42 PDT	Susan Stoba	ACCOUNTUPLOAD_ORG_NOT_IN_ACCOUNT_ERROR: Organization Name ACCOUNTUPLOAD_ORG_NOT_IN_ACCOUNT_ERROR: Organization Name	
- 224304667033667	Multi-Org.csv	8734	2013-05-10 13:06:57 PDT	Anula Mohan	ACCOUNTUPLOAD_ORG_NOT_IN_ACCOUNT_ERROR: Organization Name	
L						
Batch ID	Organization Name	File Size	File Status	Records Received	Records Loaded	Upload Option
21998822490126	Susan Stoba Test Organization	8260	Done	13	13	Update
+ 224304667033666	My org upload.csv	8734	2013-05-10 12:53:31 PDT	Anula Mohan	ACCOUNTUPLOAD_ORG_NOT_IN_ACCOUNT_ERROR: Organization Name	
+ 224304667033665	Multi-Org.csv	8734	2013-05-10 12:52:54 PDT	Anula Mohan	ACCOUNTUPLOAD_ORG_NOT_IN_ACCOUNT_ERROR: Organization Name	
+ 224304667033664	Multi-Org.csv	8734	2013-05-10 11:12:07 PDT	Anula Mohan	ACCOUNTUPLOAD_ORG_NOT_IN_ACCOUNT_ERROR: Organization Name	

Page 1 of 1 | 25 View 1 - 8 of 8

- Click the View icon in the row of the file you want to see.



The Upload Results are displayed. In this example, the sub-tab: Loaded without error (10) indicates 10 of the records loaded normally. However, note that there are invalid headings: TTY/TDD and TTY/TDD Country. Return to the CSV file and fix the issues before uploading again. That is, replace TTY/TDD with TTY 1, and replace TTY/TDD Country with TTY Country 1.

ACCOUNT: New US SQA Account (Account Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

everbridge | Notifications | **Contacts** | Users | Roles | Settings

Contact Upload > Upload Result | Refresh

Organization Name: Yelena Petrova Test Org  
File Name: Contacts\_ForAccount\_QA1.csv  
Batch ID: 21998822490148  
Sender: Yelena Petrova  
Status: Done  
Records Received: 3

Loaded without error (3) | Loaded with error (0) | Not loaded - critical error (0)

	First Name	M.I.	Last Name	External ID	Record Type
	Henry		Bommer	UP005	Contact
	Jona		Bao	UP002	Employee
	Mo		Bettah	UP003	Contact

Page 1 of 1 | 25 | View 1 - 3 of 3

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- 3 Select each tab to see the contact names of the upload results.
- 4 Click the View icon next to the desired contact name to see further details.  
The contact records that were received are listed on one of the three results tabs:
  - Loaded without error—Records loaded normally.
  - Loaded with error—Records that had something incorrect, but there was enough good information to load them anyway.
  - Not Loaded - Critical—Records that had errors so severe that they were not loaded.
- 5 See the following example results.



- Loaded without error (*nn*), where *nn* is the number of contacts loaded without error. Clicking the View icon next to a contact's name displays the contact information. The following example shows one of the contacts, Ray Cabot, loaded without error.

**Loaded without error**

**General information**

First Name	Ray
Last Name	Cabot
M.I.	
Suffix	
External ID	EB-2005
Record Type	Employee
Country	US
Groups	
Group Remove	

**Address Information**

Location Name	Home
Country	US
Address	311 W Los Feliz Rd
Apt/Suite/Unit	
City	Glendale
State/Province	California
Postal Code	
Longitude:	-118.258667
Latitude:	34.1292572

**Delivery Methods**

Order	Delivery Method	Device address	Country
1	Extension Phone 1		
2	Extension Phone 2		
3	Extension Phone 3		
4	Extension Phone 4		
5	Phone 1	8185550100	US
6	Phone 2		
7	Phone 3		
8	Email Address 1		
9	Email Address 2		
10	Email Address 3		
11	SMS 1		
12	SMS 2		

**Additional Information**

Additional Information	Value / Possible Values
------------------------	-------------------------

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- Loaded with error (*nn*), where *nn* is the number of contacts loaded with errors. The following example shows four contacts loaded with error. The Error Message is: `UPLOADCONTACT_ATTRIBUTE_NAME_NOT_DEFINED_IN_ORG: Custom Field 1`. In this case, configure the Settings > Organization > Contacts and Groups > Additional Information by adding the Certifications for the four contacts.

The screenshot shows the Everbridge interface for the 'Contacts' section. The 'Upload Result' page displays details for a CSV upload: File Name (Users-for-doc\_2013-03-05.csv), Batch ID (2199822490118), Sender (Lucy Kajimoto), Status (Done), and Records Received (37). Below this, the 'Header Errors' section shows an error code 'HEADER\_INVALID\_HEADER\_IN\_CSV\_ERROR' with the message 'TTY/TDD, TTY/TDD Country'. A table below lists four contacts that failed to load due to the error 'UPLOADCONTACT\_ATTRIBUTE\_NAME\_NOT\_DEFINED\_IN\_ORG: Custom Field 1'.

First Name	M.I.	Last Name	External ID	Record Type	Error Message
Joe	C	Oliver	EB-0002	Employee	UPLOADCONTACT_ATTRIBUTE_NAME_NOT_DEFINED_IN_ORG: Custom Field 1
Juan		Gonzales	EB-0003	Employee	UPLOADCONTACT_ATTRIBUTE_NAME_NOT_DEFINED_IN_ORG: Custom Field 1
Mary	M	Briggs	EB-0006	Employee	UPLOADCONTACT_ATTRIBUTE_NAME_NOT_DEFINED_IN_ORG: Custom Field 1
Ruth		Carter	EB-0008	Employee	UPLOADCONTACT_ATTRIBUTE_NAME_NOT_DEFINED_IN_ORG: Custom Field 1





- Not loaded - critical (*nn*), where *nn* is the number of contacts not loaded from the CSV file. The following example shows 23 contacts not loaded. The Error Message is: UPLOADCONTACT\_RECORD\_TYPE\_NOT\_FOUND\_IN\_ORG: Record Type. In this case, configure the Settings > Organization > Contacts and Groups > Contact Record Types by adding the “Opt-in” record type.

**Upload Result**

Download Refresh

File Name: Users-for-doc\_2013-03-05.csv  
Batch ID: 21998822490118  
Sender: Lucy Kajimoto  
Status: Done  
Records Received: 37

**Header Errors**

Error Code	Error Message
HEADER_INVALID_HEADER_IN_CSV_ERROR	TTY/TDD, TTY/TDD Country

Loaded without error (10) | Loaded with error (4) | **Not loaded - critical error (23)**

First Name	M.I.	Last Name	External ID	Record Type	Error Message
Alan		Maxwell	328722374197009	Opt-in	UPLOADCONTACT_RECORD_TYPE_NOT_FOUND_IN_ORG: Record Type
Alex		Russell	328722374197003	Opt-in	UPLOADCONTACT_RECORD_TYPE_NOT_FOUND_IN_ORG: Record Type
Barry		Kalman	328722374197008	Opt-in	UPLOADCONTACT_RECORD_TYPE_NOT_FOUND_IN_ORG: Record Type
Bob		Pollan	328722374197007	Opt-in	UPLOADCONTACT_RECORD_TYPE_NOT_FOUND_IN_ORG: Record Type
Chad		Newman	328722374197010	Opt-in	UPLOADCONTACT_RECORD_TYPE_NOT_FOUND_IN_ORG: Record Type
Charlie		Park	328722374197018	Opt-in	UPLOADCONTACT_RECORD_TYPE_NOT_FOUND_IN_ORG: Record Type

- 6 Click the Contacts link in the upper left-hand corner of the page to return to the Upload Results.

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



---

# Uploading a Contact Data File Via Secure FTP

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

## To submit a Contact data file via Secure FTP

- 1 From the Settings tab at the Organization level, select Contacts and Groups > Security. Or, from the Settings tab at the Account level, select Contacts > Security.
- 2 With your IT department, perform the procedures *To use Secure FTP to upload contact data files* on page 386 and *To use File Encryption for additional security* on page 387.
  - Download the Access Instructions to prepare and test your connection to the Everbridge Secure FTP Server as well as to encrypt your Contact data at the file level using PGP or GPG in addition to the standard encryption in transit (SSL or TLS) provided by Everbridge.

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

- 3 Prepare your Contact data file. (See *Preparing to Upload Contacts* on page 168.)
- 4 Ask your IT department to configure your computer system and Secure FTP software. The Secure FTP software is scripted to perform the transfer. (For a description of the FTP directories, see *step 5* on page 191.)
- 5 When the Contact data file is transferred, from the Contacts tab, perform steps 5-7 of the procedure *To upload a list of Contacts using the web-based interface* on page 189.

# Scheduling

This chapter provides information about Scheduling. You can manage calendars, shifts, and staff from **Contacts > Scheduling**.

**The following topics are covered:**

- ♦ *Overview of Scheduling*
- ♦ *Working in Calendar View*
- ♦ *Working in Shift View*
- ♦ *Working in Staff View*
- ♦ *Managing Staff and Shifts*



# Overview of Scheduling

The Scheduling sub-tab offers a calendar interface where you can maintain multiple calendars in an organization, multiple shifts on a calendar, and manage shift assignments and staff availability.

The screenshot displays the Everbridge Scheduling interface. At the top, there's a navigation bar with 'Contacts' highlighted. Below it, a sidebar shows 'Calendar' as the active tab. The main area is titled 'Primary On-Call' and shows a calendar for the week of July 27 to August 2, 2014. The calendar is divided into three columns: First Shift (blue), Second Shift (purple), and Third Shift (green). Each shift is represented by a colored block with a person icon. Below the calendar, there's a table listing the shifts: First Shift, Second Shift, and Third Shift, with their respective last modified dates. The interface also includes a 'Manage Staff' dropdown and a 'Shifts(3)' section.

Shift Name	Last Modified
First Shift	2014-06-05 11:45:27 PDT
Second Shift	2014-07-28 08:20:29 PDT
Third Shift	2014-06-05 11:58:58 PDT

The first time you access the Scheduling sub-tab, you are prompted to create a Calendar. The attributes of a calendar are: name, email distribution, and any shifts.



Documentation (Organization Admin) ▾

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**Scheduling**

Calendar

Calendar Name	Shift(s)
There are no items to display in this table.	

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You don't have any Calendar yet.  
[Create one now](#)

1) Create a Calendar

2) Add Shifts

3) Add staff to Shifts



---

## Working in Calendar View

Once you have a calendar, you can add shifts, and then add staff to the shifts. Besides the Calendar view, you can also view by Shift or Staff. This allows you to swap shifts as needed, and handle understaffed shifts. You can use automated email notifications to monitor changes (when the calendar is made “active”).

### To add a calendar

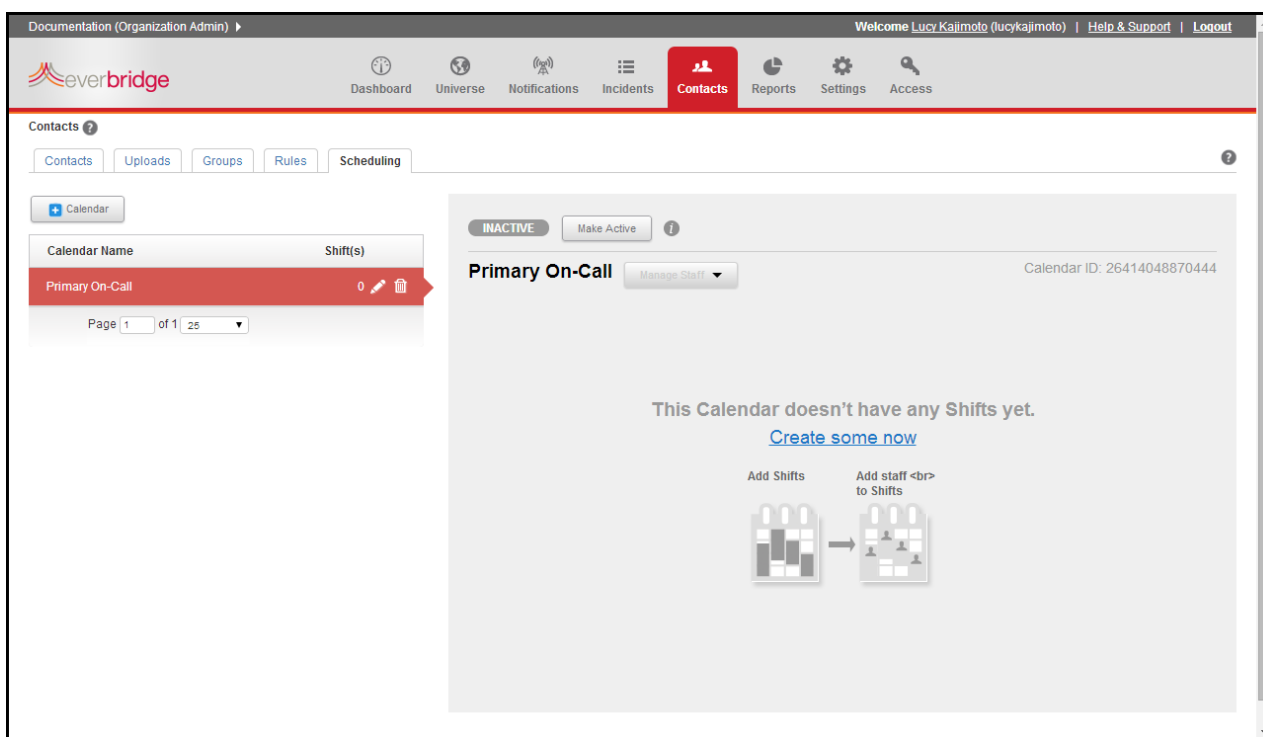
- 1 From the Contacts tab, select the Scheduling sub-tab, and click the + Calendar button (or click Create One Now if this is the first time you have accessed Scheduling). The Add/Edit Calendar dialog is displayed.

The screenshot shows a dialog box titled "Add/Edit Calendar". It has a "Calendar Name" field with a red border and an error icon. Below it is a checkbox labeled "When changes are made to this Calendar, email:" followed by a text input field containing "name@email.com, name@email.com". Under "Calendar ID:", there are two links: "Using API's? Create an Calendar ID or Use an Auto-generated One." At the bottom are "Save" and "Cancel" buttons.

- 2 In the Calendar Name field, type a meaningful name.
- 3 Optionally, select the check box: When changes are made to this Calendar, email. Then, enter email addresses for those who should be notified of changes. Separate each email address with a comma.
- 4 In the External ID field, do one of the following:
  - If using APIs, select the link: Using APIs? Create a Calendar ID. From the Calendar ID field, select the link. A text box is displayed from which you enter the calendar ID. (Even if the calendar is renamed, it keeps its ID.)
  - Otherwise, skip to the next step. The system will auto-generated an external ID.
- 5 Click Save.



- 6 Your new calendar name is listed in the left-hand pane, while the right-hand pane shows that you have not yet created any shifts.



**NOTE:** The current status of the calendar is INACTIVE. While INACTIVE, you can build out your shifts and staff without pushing email notifications to the distribution list. Change notifications are only sent to calendar administrators, if any, if the Calendar is ACTIVE. The calendar will not appear anywhere else in the organization until it is ACTIVE. Remember to click the Make Active button when you are ready for your calendar administrators to receive email change notifications and for the calendar to be available for notification purposes.



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Contacts | Calendar | Uploads | Groups | Rules | Scheduling

Calendar Name: Primary On-Call Shift(s): 3

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ACTIVE Make Inactive

Primary On-Call Manage Staff Calendar ID: 26414048870444

Jun 1 - 7 2014

	Sun 6/1	Mon 6/2	Tue 6/3	Wed 6/4	Thu 6/5	Fri 6/6	Sat 6/7
12am					06:00pm - 06:00pm Third Shift	06:00pm - 06:00pm Third Shift	06:00pm - 06:00pm Third Shift
1am							
2am							
3am							
4am							
5am							
6am					06:00pm - 06:00pm First Shift	06:00pm - 06:00pm First Shift	06:00pm - 06:00pm First Shift
7am							
8am							
9am							
10am							
11am							
12pm							
1pm							
2pm							
3pm							
4pm							
5pm							
6pm					06:00pm - 06:00pm Third Shift	06:00pm - 06:00pm Third Shift	06:00pm - 06:00pm Third Shift
7pm							
8pm							
9pm							
10pm							
11pm							

- 7 Proceed to the procedure *To create a shift* on page 208, as needed. You must create one or more shifts.

### To edit a calendar

- 1 From the Scheduling sub-tab, ensure that the desired Calendar Name in the left-hand pane is selected.
- 2 Click the Pencil icon of the highlighted calendar. The Add/Edit Calendar dialog is displayed.

Add/Edit Calendar

\* Calendar Name: Primary On-Call

☒ When changes are made to this Calendar, email:

Lucy.Kajimoto@everbridge.com

External ID: 18060000002c

Save Cancel

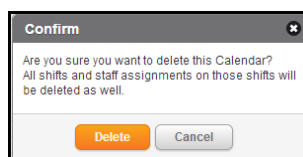
- 3 Change the fields as needed, and click Save. (Review the steps in the procedure *To add a calendar* on page 204 for details about each field.)





### To delete a calendar

- 1 From the Scheduling sub-tab, ensure that the desired Calendar Name in the left-hand pane is selected.
- 2 Click the Trash Bin of the highlighted calendar.  
The Delete Calendar dialog is displayed.



- 3 Click Delete to confirm the deletion.  
The calendar, its shifts, and all staff assignments on the shifts are deleted.



## Working in Shift View

Once you have a calendar, you can add as many shifts to it as you need. In Shift view, you can see the shifts on a calendar, and the individuals staffing each shift. Each staff member is displayed on the calendar by name (external ID).

The screenshot shows the Everbridge Scheduling interface. At the top, there's a navigation bar with 'Contacts' selected. Below it, there's a sub-tab for 'Scheduling'. The main area displays a calendar for June 8-14, 2014. The calendar shows three shifts: First Shift (06:00 AM - 14:00 PM, 7 day), Second Shift (10:00 AM - 18:00 PM, 7 day), and Third Shift (18:00 PM - 06:00 AM, 7 day). Each shift is staffed by multiple individuals, with their names and external IDs listed for each day of the week.

Name	Sunday 6/8	Monday 6/9	Tuesday 6/10	Wednesday 6/11	Thursday 6/12	Friday 6/13	Saturday 6/14
<b>First Shift</b> 06:00 AM - 14:00 PM, 7 day	Cindy Kwok(8185772382), Sheila Morgan(8185772219)	Cindy Kwok(8185772382), Sheila Morgan(8185772219)	Cindy Kwok(8185772382), Sheila Morgan(8185772219)	Cindy Kwok(8185772382), Sheila Morgan(8185772219)	Cindy Kwok(8185772382), Sheila Morgan(8185772219)	Cindy Kwok(8185772382), Sheila Morgan(8185772219)	Cindy Kwok(8185772382), Sheila Morgan(8185772219)
<b>Second Shift</b> 10:00 AM - 18:00 PM, 7 day	Craig Barrick(8185772201), Sharon M Benne tt(3.22E+18)	Craig Barrick(8185772201), Sharon M Benne tt(3.22E+18)	Craig Barrick(8185772201), Sharon M Benne tt(3.22E+18)	Craig Barrick(8185772201), Sharon M Benne tt(3.22E+18)	Craig Barrick(8185772201), Sharon M Benne tt(3.22E+18)	Craig Barrick(8185772201), Sharon M Benne tt(3.22E+18)	Craig Barrick(8185772201), Sharon M Benne tt(3.22E+18)
<b>Third Shift</b> 18:00 PM - 06:00 AM, 7 day	Brad Currier(8185772321), Yvonne Gallegos (8182309748)	Brad Currier(8185772321), Yvonne Gallegos (8182309748)	Brad Currier(8185772321), Yvonne Gallegos (8182309748)	Brad Currier(8185772321), Yvonne Gallegos (8182309748)	Brad Currier(8185772321), Yvonne Gallegos (8182309748)	Brad Currier(8185772321), Yvonne Gallegos (8182309748)	Brad Currier(8185772321), Yvonne Gallegos (8182309748)

### To create a shift

- 1 From the Scheduling sub-tab, ensure that the desired Calendar Name in the left-hand pane is selected.
- 2 Select the + Shift button (or click Create Some Now if you have never created a shift).

The Add/Edit Shift dialog is displayed.

Add/Edit Shift

Calendar Name:Primary On-Call

\* Shift Name:

Display color:

Days of week:

Entire week (7 days)

Custom

Hours:

24 hours

Start at:

00

:00

End at:

00

:00

Start Date:

2014-08-13

End At:

No end date

Time Zone:Pacific Daylight Time

Minimum staff requirements:

None

Meet certain minimums

Save

Cancel

3 Enter the information as desired. Use the following table as a guide.

Field Name	Description
Calendar Name	Pre-filled with the selected name from step 1 above.
* Shift Name	Enter a name for this specific shift.
Display Color	Click the round color icon to change the color of this shift.
Days of the week	Select one of the following: <div><div>Entire week (7 days)—Default</div><div>Custom—Manually select the days and their time ranges (or select/clear the 24 Hours check box for each day). If you select Custom, you can choose custom dates and times for your shifts, as needed. Use a 24-hour clock and 15-minute increments.</div></div>

Days of week:

Entire week (7 days)

Custom

Days:Timing:

☑ Sun

06:00

to

14:00

☐ 24 hours

☑ Mon

06:00

to

14:00

☐ 24 hours

☑ Tue

06:00

to

14:00

☐ 24 hours

☑ Wed

06:00

to

14:00

☐ 24 hours

☑ Thu

06:00

to

14:00

☐ 24 hours

☑ Fri

06:00

to

14:00

☐ 24 hours

☑ Sat

06:00

to

14:00

☐ 24 hours

Start Date:

2014-04-23

End At:

No end date

Timezone:Pacific Daylight Time

Hours	Select one of the following: <div><div>24 Hours—Default.</div><div>If you clear the 24 Hours check box, select the Start At and End At time ranges using a 24-hour clock and 15-minute increments. The default is 00:00 to 00:00 (Midnight to Midnight).</div></div>
Start Date	Click the Calendar icon to select the Start Date. The default date is today.

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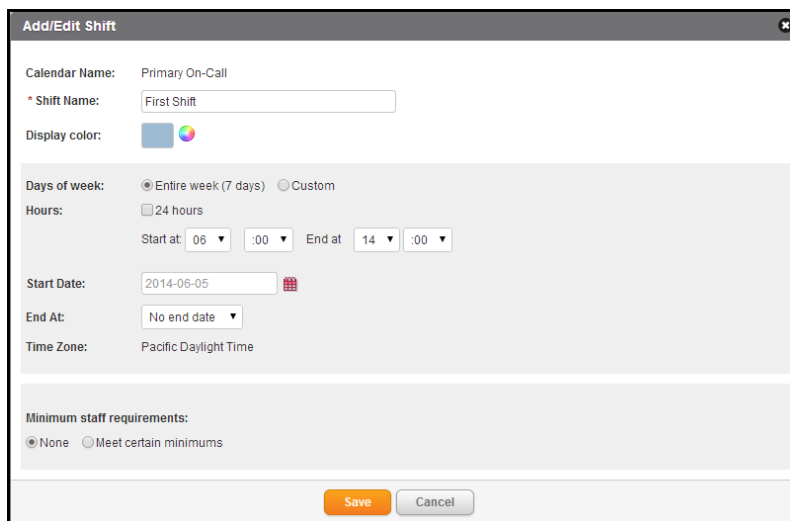
Field Name	Description
End At	Select one of the following: <ul style="list-style-type: none"><li>◇ No end date—Default.</li><li>◇ Specific date, then click the Calendar icon to select the End Date.</li></ul>
Time Zone	The current time zone is displayed.
Minimum Staff Requirements	Select one of the following: <ul style="list-style-type: none"><li>◇ None—Default</li><li>◇ Meet certain minimums—From the Add Another field, select the field for a specific type of staff and then select the number required. (This field is derived from Settings &gt; Contacts and Groups &gt; Additional Information. Only single-selection lists are displayed.) For example, select Role = Engineer, Requested #2 if you must have two engineers on the shift.</li></ul>

If you need additional types of staff, continue to Add Another field until you have listed all staff types and the number required for each type. Remember to click Save.

- 4 Click Save.  
Your shift is displayed on the calendar.



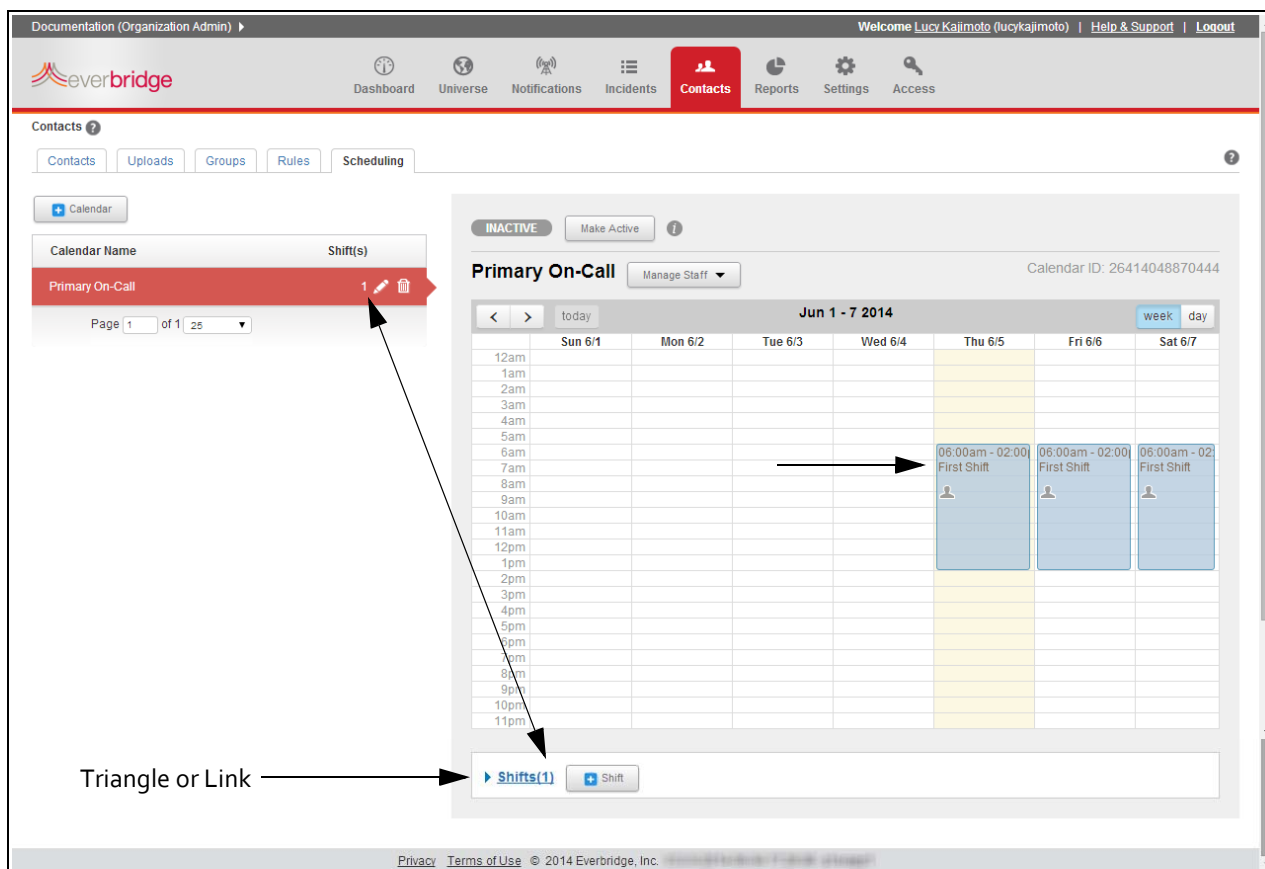
In the following example, the First Shift is comprised of the Entire Week from 06:00 to 14:00 (24-hour clock) in the Pacific Daylight Time zone, starting today with no end date. There are no minimum staff requirements.



The 'Add/Edit Shift' dialog box contains the following fields and options:

- Calendar Name:** Primary On-Call
- \* Shift Name:** First Shift
- Display color:** A color selection icon.
- Days of week:** ☒ Entire week (7 days) ☐ Custom
- Hours:** ☐ 24 hours
- Start at:** 06 :00 **End at:** 14 :00
- Start Date:** 2014-06-05
- End At:** No end date
- Time Zone:** Pacific Daylight Time
- Minimum staff requirements:** ☒ None ☐ Meet certain minimums
- Buttons:** Save, Cancel

The following example shows the Calendar view of this shift named First Shift.



The screenshot shows the Everbridge 'Contacts' page with the 'Scheduling' tab selected. A list of calendars on the left shows 'Primary On-Call' with a red bar and a triangle icon. An arrow points from this icon to the 'Shifts(1)' link at the bottom of the calendar view. The calendar view itself shows a weekly grid for June 1-7, 2014. A blue block labeled '06:00am - 02:00 First Shift' is visible on Thursday, Friday, and Saturday. An arrow points from the 'Shifts(1)' link to this block.

Triangle or Link →



- 5 Repeat steps 2-4 for each shift of a particular calendar.  
As you create additional shifts, you can use the Calendar view to ensure you are covering the time frames as intended. Now you are ready to manage staff for each shift.
- 6 Proceed to the procedure *To add staff to a shift*, as needed.

### To edit a shift

- 1 From the Scheduling sub-tab, ensure that the desired Calendar Name in the left-hand pane is selected.
- 2 Under the calendar in the right-hand pane, select the triangle or the link: Shifts (N) where N is the number of created shifts.  
The list of shifts is displayed.

The screenshot displays the Everbridge Scheduling interface. On the left, a sidebar shows the 'Calendar Name' 'Primary On-Call' with a 'Shift(s)' count of 1. The main area shows a calendar view for 'Jun 1 - 7 2014'. The calendar grid shows shifts for Thursday 6/5, Friday 6/6, and Saturday 6/7, each labeled '06:00am - 02:00 First Shift'. Below the calendar, a 'Shifts(1)' section lists the 'First Shift' with a 'Last Modified' date of '2014-06-05 11:09:59 PDT'. The interface includes navigation tabs like 'Contacts', 'Uploads', 'Groups', 'Rules', and 'Scheduling', and a top navigation bar with 'Dashboard', 'Universe', 'Notifications', 'Incidents', 'Contacts', 'Reports', 'Settings', and 'Access'.

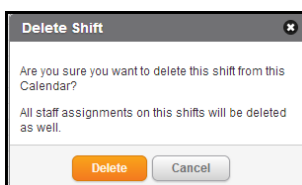
- 3 Click check box and the Pencil icon of the shift to be edited.  
The Add/Edit Shift dialog is displayed.
- 4 Change the fields as needed, and click Save.



(Review the steps in the procedure *To create a shift* on page 208 for details about each field.)

### To delete a shift

- 1 From the Scheduling sub-tab, ensure that the desired Calendar Name in the left-hand pane is selected.
- 2 Under the calendar in the right-hand pane, select the triangle or the link: Shifts (*N*) where *N* is the number of created shifts.  
The list of shifts is displayed.
- 3 Click check box of the shift to be deleted.
- 4 Click the Delete button.  
The Delete Shift dialog is displayed.



- 5 Click Delete.  
The shift and all staff assignments on this shift are deleted.



# Working in Staff View

When you have a shift, you can add staff to the shift. In Staff view, staff members are listed along the left-hand side, and their shifts are shown in the calendar.

The screenshot shows the Everbridge interface for an Organization Admin. The top navigation bar includes links for Dashboard, Universe, Notifications, Incidents, Contacts (highlighted), Reports, Settings, and Access. The main content area is titled 'Contacts' and has tabs for Contacts, Uploads, Groups, Rules, and Scheduling. The 'Scheduling' tab is active, showing a 'Primary On-Call (Inactive)' status. Below this, there's a 'Staff' button and a calendar for 'June 8 - 14, 2014'. The calendar is in 'Week' view. A table lists staff members and their assigned shifts for each day of the week.

Name	Sunday 6/8	Monday 6/9	Tuesday 6/10	Wednesday 6/11	Thursday 6/12	Friday 6/13	Saturday 6/14
Yvonne Gallegos (8182309748)	Th...	Third Shift	Third Shift	Third Shift	Third Shift	Third Shift	Th...
Cindy Kwok (8185772382)	First...	First...	First...	First...	First...	First...	First...
Sheila Morgan (8185772219)	First...	First...	First...	First...	First...	First...	First...
Brad Currier (8185772321)	Th...	Third Shift	Third Shift	Third Shift	Third Shift	Third Shift	Th...
Craig Barrick (8185772201)	Seco...	Seco...	Seco...	Seco...	Seco...	Seco...	Seco...
Sharon M Bennett (3.22E+18)	Seco...	Seco...	Seco...	Seco...	Seco...	Seco...	Seco...

## To add staff to a shift

- 1 From the right-hand pane, next to the calendar name, select the Manage Staff button, and select Staff View.

**NOTE:** Alternatively, you could select a silhouette from a date on the Calendar view, then click Add staff to this shift.

- 2 Select the + Staff button (or, if you have no staff members listed, select the link: start adding them).





The Add/Edit Staff dialog is displayed.

Add/Edit Staff

Shift: First Shift

Single day(s)

Date range

Rotation

Days:

SMTWTFSS

Every: 1 week(s)

Start Date:

End at:

No end date

Individuals

<input type="checkbox"/>	First Name	M.I.	Last Name	Suffix	External ID
<input type="checkbox"/>	Nicholas		Allison		MP-0002
<input type="checkbox"/>	Craig		Barrick		8185772201
<input type="checkbox"/>	Sharon	M	Bennett		3.22E+18
<input type="checkbox"/>	Scott		Colby		8185772220
<input type="checkbox"/>	Brad		Currier		8185772321
<input type="checkbox"/>	Lucy		Kajimoto		8182309732
<input type="checkbox"/>	Cindy		Kwok		8185772382

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Individuals

Remove

Save

Cancel



- 3 Optionally, use the Advanced Search feature to your search. Select the field on which to search, select from the Condition from the drop-down list, then type your value. For example, to find all contacts who are located in ZIP code 91203, select Location Postal Code, is equal to, then type 91203.

**Add/Edit Staff**

Shift: First Shift

☐ Single day(s)      Days: S M T W T F S      Start Date:

☐ Date range      Every: 1 week(s)      End at: No end date

☒ Rotation

**Advanced Search**

Field	Condition	Value
Location Postal Code	is equal to	91203

Add Filter Search: Select Field

<input type="checkbox"/>	First Name	M.I.	Last Name	Suffix	External ID
<input type="checkbox"/>	Craig		Barrick		8185772201
<input type="checkbox"/>	Sharon	M	Bennett		3.22E+18
<input type="checkbox"/>	Scott		Colby		8185772220
<input type="checkbox"/>	Brad		Currier		8185772321
<input type="checkbox"/>	Yvonne		Gallegos		8182309748
<input type="checkbox"/>	Lucy		Kajimoto		8182309732
<input type="checkbox"/>	Cindy		Kwok		8185772382

Page 1 of 2

- 4 At the top of the Add/Edit Staff dialog, enter the information as desired for this shift by individual. Use the following table as a guide.

Field Name	Description
Single day(s)	Single day(s)—click the respective radio button, then click the Calendar icon to select the day. Click the link: Add another to continue adding single days.
Date range	Date range—click the respective radio button. For Start by, click its Calendar icon to select the Start by date. For End at, click its Calendar icon to select the End at date.
Rotation	Rotation—click the respective radio button. To rotate shift coverage, you can select individual days, how often (in the Every ___ weeks field), a Start Date (click the Calendar icon to select the Start Date), and an End by (No end date or click the Calendar icon to select the End Date).
Individuals	Select the check boxes of the individuals for this shift.

- 5 Click Save.  
Each staff member is listed in the left-hand pane.



# Managing Staff and Shifts

There are different ways to manage your staff and shifts. You can manage by means of the Calendar view, or the individual Staff or Shift view.

## Staff View

From the Staff view, select the Down Arrow of the individual you want to manage.

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Contacts Uploads Groups Rules Scheduling

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Primary On-Call (Inactive)

Staff

Shifts Staff

June 1 - 7, 2014 Week Day

Name	Sunday 6/1	Monday 6/2	Tuesday 6/3	Wednesday 6/4	Thursday 6/5	Friday 6/6	Saturday 6/7
Cindy Kwok (8185772382)					First...	First...	First...
Sheila Morgan (8185772219)					First...	First...	First...

Manage staff schedule  
Add to other shift  
Make unavailable  
Clear all shifts

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You can select any of the following:

- Manage staff schedule—edit or delete this individual's schedule.
- Add to another shift—add this individual to a different shift.



- Make unavailable—provide dates that this individual is unavailable, for example, on vacation or holiday. The Calendar view for the individual displays “UNAVAILABLE”, removing the person from any shifts. The individual cannot be added to any shifts while unavailable.

The screenshot shows the Everbridge 'Contacts' page with the 'Scheduling' tab selected. On the left, the 'Primary On-Call' calendar is listed. The main area displays a weekly calendar for 'Jun 8 - 14 2014'. The calendar is currently 'Inactive'. A tooltip for 'Cindy Kwok (Unavailable)' is shown over the 9am-10am slot on Tuesday, June 10th. The tooltip includes the name 'Cindy Kwok (Unavailable)', 'Sheila Morgan', and two links: 'Manage staffing' and 'Add staff to this shift'.

From the Staff view, select Make unavailable for an individual. The Make Unavailable dialog appears. Select the dates that the individual is on vacation, for example, and click Save.

The 'Make unavailable' dialog box is shown. It has a title bar with a close button. The content area shows 'Calendar: Primary On-Call' and 'Staff: Cindy Kwok'. There are three radio buttons: 'Single day(s)', 'Date range', and 'Rotation'. The 'Rotation' option is selected. To the right of the radio buttons are 'Days' (S M T W T F S) and 'Every: 1 week(s)'. On the right side, there are 'Start Date:' and 'End at:' fields. 'Start Date:' is 2014-06-10 and 'End at:' is 2014-06-13. At the bottom, there are 'Save' and 'Cancel' buttons.



The Staff view displays “unavailable” for the selected time period.

The screenshot shows the Everbridge Staff view interface. At the top, there's a navigation bar with icons for Dashboard, Universe, Notifications, Incidents, Contacts (selected), Reports, Settings, and Access. Below this, there's a 'Contacts' section with tabs for Contacts, Uploads, Groups, Rules, and Scheduling. The 'Scheduling' tab is active, showing a 'Primary On-Call (Inactive)' status. A date range selector shows 'June 8 - 14, 2014' with 'Week' and 'Day' views. The main area is a calendar grid with columns for each day from Sunday 6/8 to Saturday 6/14. Rows list staff members: Yvonne Gallegos, Cindy Kwok, Sheila Morgan, Brad Currier, Craig Barrick, and Sharon M Bennett. Cindy Kwok's shifts for Tuesday 6/10, Wednesday 6/11, Thursday 6/12, and Friday 6/13 are marked as 'unavailable'. An arrow points to the 'unavailable' label for Wednesday 6/11.

Name	Sunday 6/8	Monday 6/9	Tuesday 6/10	Wednesday 6/11	Thursday 6/12	Friday 6/13	Saturday 6/14
Yvonne Gallegos (8182309748)	Th...	Third Shift	Third Shift	Third Shift	Third Shift	Third Shift	Th...
Cindy Kwok (8185772382)	First...	First...	unavailable	unavailable	unavailable	unavailable	First...
Sheila Morgan (8185772219)	First...	First...	First...	First...	First...	First...	First...
Brad Currier (8185772321)	Th...	Third Shift	Third Shift	Third Shift	Third Shift	Third Shift	Th...
Craig Barrick (8185772201)	Seco	Seco	Seco	Seco	Seco	Seco	Seco
Sharon M Bennett (3.22E+18)	Seco	Seco	Seco	Seco	Seco	Seco	Seco

- Clear all shifts—remove this individual from all shifts on this calendar.



## Shift View

Likewise, from the Shift view, select the Down Arrow of the shift you want to manage.

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Contacts ?

Contacts Uploads Groups Rules Scheduling

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< Scheduling home link

Shift view

Shifts Staff

Primary On-Call (Inactive)

+ Shift

June 1 - 7, 2014 Week Day

Name	Sunday 6/1	Monday 6/2	Tuesday 6/3	Wednesday 6/4	Thursday 6/5	Friday 6/6	Saturday 6/7
First Shift 06:00 AM - 14:00 PM, 7 day							

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You can select any of the following:

- ◇ Manage staffing—edit or delete individuals' shifts.
- ◇ Add staff to this shift—the Add/Edit Staff dialog is displayed.
- ◇ Clear all staff—remove all staff from the current shift. When you select this option, you must confirm the deletion of staff from the current shift.

Click < Scheduling home to return to the Scheduling sub-tab home page.

# Reports

This chapter provides information about the Reports you can view and/or add.

**The following topics are covered:**

- ♦ *Overview of Reports*
- ♦ *Quick Reports*
- ♦ *Custom Reports*



# Overview of Reports

The Reports tab allows you to view two types of reports:

- ◇ Quick Reports are preconfigured and provide summary information with a few mouse clicks.
- ◇ Custom Reports allow you to select the fields you want to show and set filters on the data.

The screenshot displays the Everbridge Reports interface. At the top, there is a navigation bar with the Everbridge logo and several icons: Dashboard, Universe, Notifications, Incidents, Contacts, Reports (highlighted in red), Settings, and Access. The main content area is titled 'Reports' and is divided into two sections: 'Quick Reports' and 'Custom Reports'.

**Quick Reports**

Under 'Quick Reports', there is a dropdown menu with the following options: Notification Summary, Event Analysis, Detailed Notification Analysis, Escalation Summary, and Addresses Outside Geo-Fence. To the right of this menu, the 'Notification Summary Report' is displayed, with a 'View Report' button below it.

**Custom Reports**

Under 'Custom Reports', there is a 'Delete' button and a 'Create Report' button. Below these buttons is a table with the following columns: Name, Type, Created On, Created By, and Last Updated. The table is currently empty, displaying the message 'No custom reports' and 'Create one now'.

At the bottom of the interface, there is a pagination bar showing 'Page 1 of 1' and a '25' dropdown menu. The footer contains links for 'Privacy' and 'Terms of Use', and a copyright notice: '© 2014 Everbridge, Inc.'.





# Quick Reports

The following quick reports are discussed:

- ◆ *Notification Summary*
- ◆ *Event Analysis*
- ◆ *Detailed Notification Analysis*
- ◆ *Escalation Summary*
- ◆ *Addresses Outside Geo-Fence*

## Notification Summary

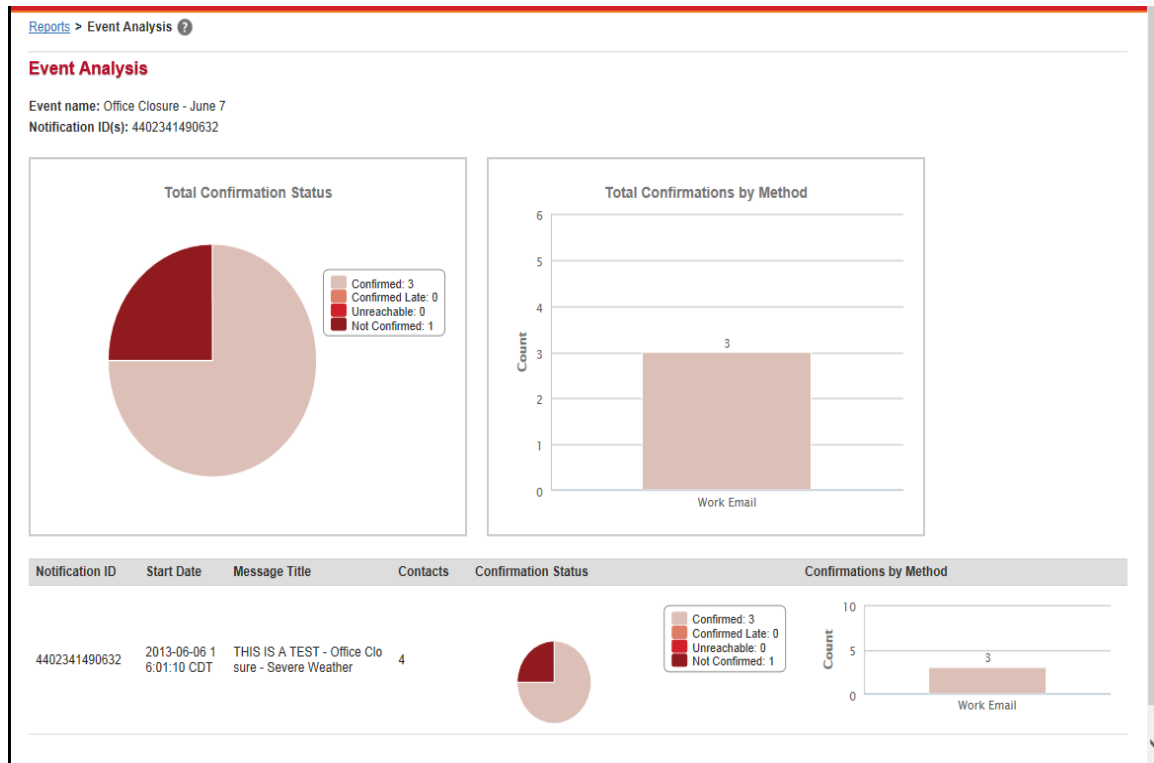
Notification Summary shows the count and type of notifications sent during a time period. Select the link: Notification Summary and the Notification History Summary page appears. Select the date range (YYYY-MM format) and click Update. You see the number of notifications sent by month and by type.





## Event Analysis

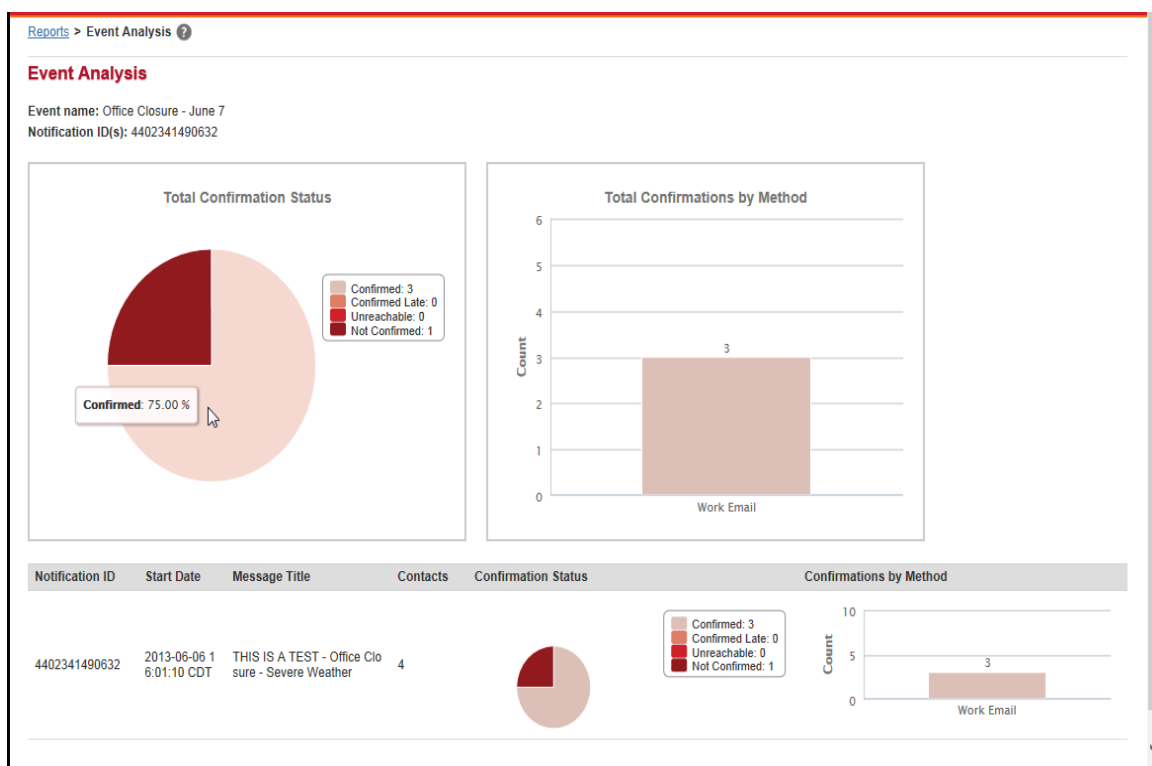
Event Analysis shows a summary of information across the notifications that are part of an event. Select the link: Event Analysis. Select an event from the drop-down list and click View Report.



On the Event Analysis report, you see the Event name and all the IDs of all the notifications that part of the event. The charts show the total confirmation status and total confirmation by path across all the notifications in the events. The Total Confirmation Status chart shows the sum of recipients in each of the confirmation categories. The Total Confirmations by Method chart shows the delivery methods that reached the contacts who confirmed.



Hover the mouse over a pie chart to see the percentage in a segment. Hover the mouse over a bar chart to see the total in a bar.



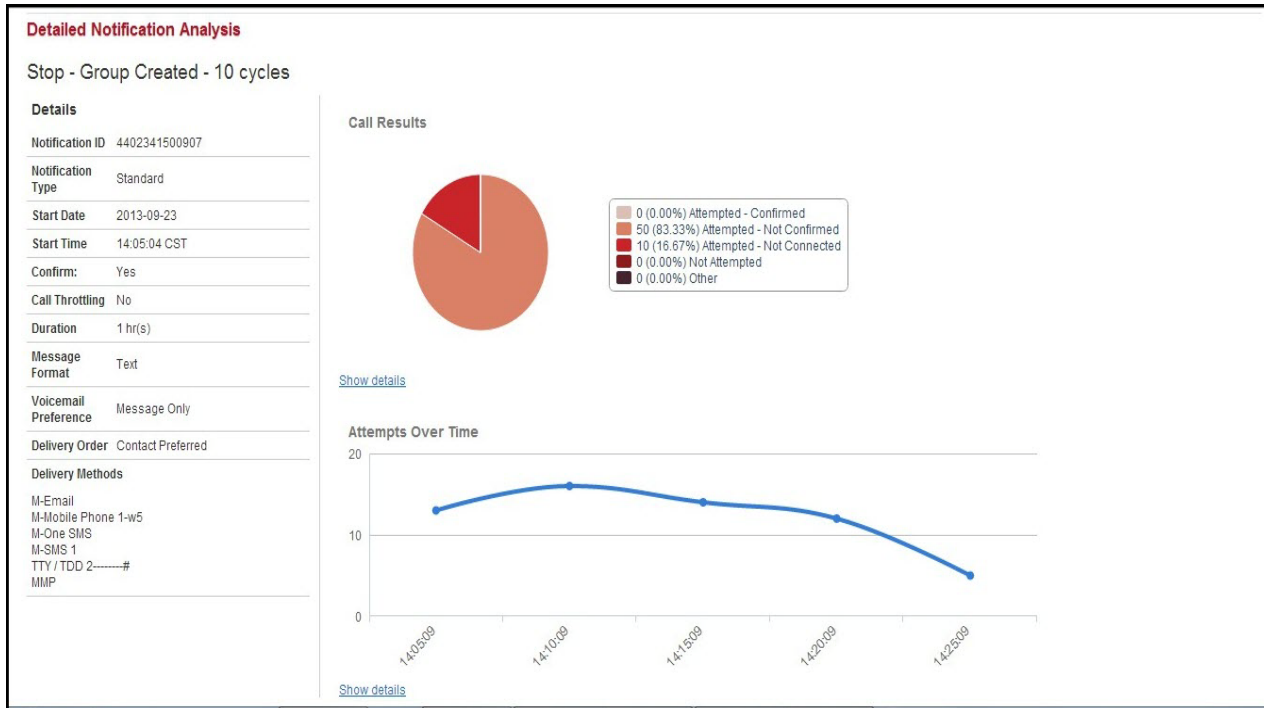
Below the totals, there is a row for each notification that is part of this event. You can see the summary results for each notification. The notifications are in order with the oldest one at the bottom of the list, so you can trace the history of the event. Hover the mouse over the Confirmation Status chart or Total Confirmations by Method to see totals per notification. Also, if the confirmation status has shows "1/2", click the down arrow to see the second part of the confirmations. Likewise, if it shows "2/2", click the up arrow to see the first part of the confirmations.

You can also review Events from the Dashboard tab. See *Event Overview* on page 52.



## Detailed Notification Analysis

The Detailed Notification Analysis report shows a summary of information for a notification that you select from the Detailed Notification Analysis list.



## Call Results Summary

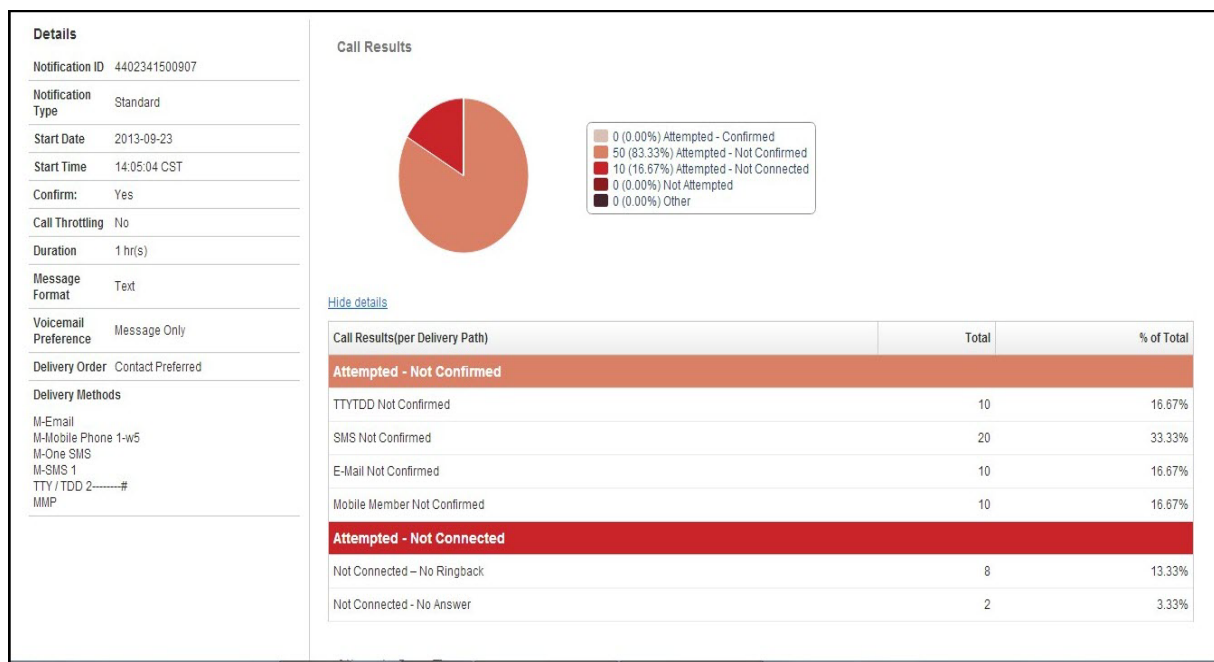
The Call Results summary displays a pie chart and the percentage of total calls in six ways:

- ◇ Connected: Voice path made connection to the number.
- ◇ Not Connected: Attempted, but no answer, line busy, no ring-back, or out of service.
- ◇ Not attempted: Duplicate, no contact path defined, or notification expired prior to attempting this path.
- ◇ Confirmed: Member confirmed receipt of the notification on this path.
- ◇ Attempted: Path has been attempted, but not yet confirmed.
- ◇ Other: Additional call results.



## Call Results Details

Selecting the link: Show details displays the details of the call results summarized in the pie chart and percentage of total calls.



After a notification is sent, you can view the information regarding the status of each contact attempt for all delivery method types. This is known as the “call result” on the Detailed Notification Analysis report. If the contact confirms receipt of the message, then the call result displays the date when the notification was confirmed.

- ♦ **Cadence:** a successful connection was made, but no subsequent audio was detected, or undefined sound was detected followed by silence. Detection of live person versus voice mail could not be determined. This could be the result of either a live person answering with "hello" and no subsequent interaction, or a very brief voice mail greeting.
- ♦ **Voice:** the call was answered by a person (positive voice detected).

Call Result	Description
♦ Connected (Cadence) - Caller hung up	A successful connection was made, detection of live person vs. voicemail could not be determined. The call was disconnected prior to delivery of the message.
♦ Connected (Cadence) - Delivered	A successful connection was made, detection of live person vs. voicemail could not be determined. The message was played, but no confirmation key press was received.
♦ Connected (Machine) - Caller hung up	A successful connection was made. No key press was detected to hear the message. Call was disconnected prior to delivery of the message.



Call Result	Description
◇ Connected (Machine) - Delivered	A successful connection was made. No key press was detected to hear the message. Greeting and Message were delivered.
◇ Connected-Machine - Delivered	
◇ Connected (Voice) - Caller hung up	A successful connection was made. A key press was detected to hear the message. Greeting and Message were not delivered, or partially delivered prior to disconnect.
◇ Connected - Member hung up	
◇ Connected - Message Delivered	A successful connection was made. A key press was detected to hear the message. Message was delivered, but confirmation key press was not received.
◇ Not Connected - No Answer	Connection was not successful. The call was attempted but the ring time duration was exceeded without connection. Ring duration is 40-90 seconds, depending on the call destination.
◇ Not connected (No Answer)	
◇ Not Connected - Restricted Number	Call was not attempted. Everbridge restricts calls to certain exchanges (for example, 911, 900, 555, 0).
◇ Not dialed (Bad phone number)	
◇ Restricted Number	
◇ Not Connected (Busy)	Call was not successful. A busy tone was detected.
◇ Not Connected - Line Busy	
◇ Not Connected (Timeout)	Call was not successful. The call was attempted but the destination phone was unavailable to ring. The contact phone may be turned off, or out of cell range.
◇ Not Connected - No Ringback	
◇ Not Connected - Out of Service	Call was not successful. The call was attempted but the destination phone provider indicated an out of service tone.
◇ Not connected (Rejected)	
◇ Connected (Machine) - Not Conferenced	A successful connection was made. No key press was detected to hear the message. Greeting and Message were delivered, including conference detail if configured by initiator.
◇ Connected - Machine - Not Conferenced	
◇ Connected - Delivered - Not Conferenced	A successful connection was made. A key press was detected to hear the message. Message was delivered; the recipient did not press 1 to join the conference bridge.
◇ CFRIP	A successful connection was made. The contact is currently connected to the conference bridge.
◇ Email Not Confirmed	Data transmission was successful. The message was not confirmed.
◇ SMS Not Confirmed	Data transmission was successful. The message was not confirmed.
◇ Text Device Not Confirmed	Data transmission was successful. The message was not confirmed.
◇ Fax Not Confirmed	A successful connection was made. Data transmission was successful. The message was not confirmed.



Call Result	Description
◇ Connected - No Fax Machine	The call was attempted but the destination phone did not respond with a fax modem connection.
◇ Connected - (Machine) - Fax machine error	A successful connection was made. An error occurred during data transmission.
◇ Numeric Page Not Confirmed	Data transmission was successful. The message was not confirmed.
◇ TTY TDD Not Confirmed	Data transmission was successful. The message was not confirmed.
◇ IM Not Confirmed	Data transmission was successful. The message was not confirmed.
◇ Undeliverable	The contact cannot be notified because they do not have the delivery methods selected for the notification defined in their profile.
◇ Not Attempted	Multiple selections of this contact were found for this notification and de-duplicated.
◇ Not Attempted - Duplicate Contact	<b>NOTE:</b> The Contact may have been selected multiple times using different criteria (for example, Rules and Groups).
◇ Not Attempted - Duplicate Contact Information	Multiple entries were found with matching contact information for the same delivery method and were de-duplicated (for example., business phone numbers shared by multiple contacts).



## Attempts Over Time

The Attempts Over Time section shows, in 5-minute intervals, the number of attempts per delivery path for all delivery paths used in the notification.

## Attempts Over Time Details

Selecting the link: Show details displays the details in 5-minute intervals per path type.







# Escalation Summary

Escalation Summary reports show the escalations used in a notification.

Corporate Security (Organization Admin)

Welcome Lucy Kajimoto (Kajimoto) | [Help & Support](#) | [Logout](#)

[Dashboard](#) [Universe](#) [Notifications](#) [Incidents](#) [Contacts](#) **[Reports](#)** [Settings](#) [Access](#)

Reports ?

**Quick Reports**

[Notification Summary](#)  
[Event Analysis](#)  
[Detailed Notification Analysis](#)  
**[Escalation Summary](#)**

Escalation Summary Report

Please select a notification

TEST - Nursing Shift Available - 2014-01-31 16:40:59 CST ▼

[View Report](#)

**Custom Reports** ?

[Delete](#) [+ Create Report](#)

<input type="checkbox"/>	Name	Type	Created On	Created By	Last Updated ▼
<input type="checkbox"/>	<a href="#">Notification with Escalations</a>	Notifications	2014-03-19 16:19:44 CDT	Nelson Daza	2014-03-19 16:19:44 CDT

Page 1 of 1 25 ▼ View 1 - 1 of 1

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Select the notification from the drop-down list and click View Report.

Corporate Security (Organization Admin)

Welcome Lucy Kajimoto (kajimoto) | Help & Support | Logout

DashboardUniverseNotificationsIncidentsContactsReportsSettingsAccess

Reports > Escalation Summary ?

### Escalation Summary

Primary Notification: TEST - Nursing Shift Available  
Notification ID(s): 4402341507731, 48382806595072

#### Total Confirmation Status

Status	Count
Not Confirmed	0
Unreachable	0
I am available to work	2
I already have a shift at the same time	2
I cannot work	0

#### Total Confirmations by Method

Method	Count
Work Email	4

#### Contact Attempts

CSV

Escalation Level	Contact Name	First Attempts	Confirmation Time
	Dave Brown	2014-01-31 16:41:27 CST	2014-02-03 07:27:54 CST
	Nelson Daza	2014-01-31 17:11:33 CST	2014-01-31 17:13:21 CST
	Claudia Dent	2014-01-31 17:11:33 CST	2014-02-01 11:15:19 CST
	Gaylene Kelly	2014-01-31 16:41:27 CST	2014-01-31 17:02:28 CST

Page 1 of 1 25 View 1 - 4 of 4

Escalation Level	Notification ID	Start Date	Message Title	Contacts	Confirmation Status	Confirmations by Method																
Primary Contacts	4402341507731	2014-01-31 16:40:59 CST	TEST - Nursing Shift Available	2	<table border="1"><thead><tr><th>Status</th><th>Count</th></tr></thead><tbody><tr><td>Not Confirmed</td><td>0</td></tr><tr><td>Unreachable</td><td>0</td></tr><tr><td>I am available to work</td><td>1</td></tr><tr><td>I already have a shift at the same time</td><td>1</td></tr><tr><td>I cannot work</td><td>0</td></tr></tbody></table>	Status	Count	Not Confirmed	0	Unreachable	0	I am available to work	1	I already have a shift at the same time	1	I cannot work	0	<table border="1"><thead><tr><th>Method</th><th>Count</th></tr></thead><tbody><tr><td>Work Email</td><td>2</td></tr></tbody></table>	Method	Count	Work Email	2
Status	Count																					
Not Confirmed	0																					
Unreachable	0																					
I am available to work	1																					
I already have a shift at the same time	1																					
I cannot work	0																					
Method	Count																					
Work Email	2																					
Escalation Level 1	48382806595072	2014-01-31 17:11:00 CST	TEST - Nursing Shift Available	2	<table border="1"><thead><tr><th>Status</th><th>Count</th></tr></thead><tbody><tr><td>Not Confirmed</td><td>0</td></tr><tr><td>Unreachable</td><td>0</td></tr><tr><td>I am available to work</td><td>1</td></tr><tr><td>I already have a shift at the same time</td><td>1</td></tr><tr><td>I cannot work</td><td>0</td></tr></tbody></table>	Status	Count	Not Confirmed	0	Unreachable	0	I am available to work	1	I already have a shift at the same time	1	I cannot work	0	<table border="1"><thead><tr><th>Method</th><th>Count</th></tr></thead><tbody><tr><td>Work Email</td><td>2</td></tr></tbody></table>	Method	Count	Work Email	2
Status	Count																					
Not Confirmed	0																					
Unreachable	0																					
I am available to work	1																					
I already have a shift at the same time	1																					
I cannot work	0																					
Method	Count																					
Work Email	2																					


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When viewing the report, you can click the Escalation Summary link to print or save the report as a PDF file. In the report, you can see a list of contact attempts in ascending, chronological order.

**Escalation Summary**  
Organization: Susan Stoba Test Organization  
Message Subjects: Chemical spill at Wall St  
Confirmed Responses Needed: 1

Total Confirmation Status



Confirmed: 0

Confirmed Late: 0

Unreachable: 2

Not Confirmed: 9

No results yet




**Escalation Summary**  
Organization: Susan Stoba Test Organization

**Message**  
**Chemical spill at Wall St**  
There is a chemical spill at our Wall St location. Hospital team report there. All others evacuate until you receive all clear message!

**Settings**  
**Sender E-Mail Display:** susan.stoba@everbridge.com  
**Sender caller ID:**

United Kingdom:	122784897
Germany:	236642920
Australia:	36464119
New Zealand:	36692114
United States:	8196414421
China:	80000000000000000000

  
**Delivery Order:** Contact Preferred  
**Delivery methods:** 1. Primary email  
2. MHA  
  
**Apply Voice Delivery Throttle Rules:** No  
**Notification Duration:** 1 hr(s)  
**Contact Cycles:** 1  
**Cycle Interval:** 0 min(s)  
**Delivery Method Interval:** 0 min(s)  
**Voice mail preference:** No Message  
**Confirm:** Yes  
  
**Mobile Member App Settings:**  
1. Allow Share:true  
2. Request Image:true  
3. Request Comment:true  
4. Request Location:true  
  
**Language:** en\_US

Escalation Level	Notification ID	Start Date	Message Title	Contacts	Confirmation Status	Confirmations by Method
Primary Contacts	4402341507990	2014-02-13 07:33:22 PST	Chemical spill at Wall St	2		No results yet
Escalation Level 1	48382806595785	2014-02-13 07:38:30 PST	Chemical spill at Wall St	4		No results yet
Escalation Level 2	9236321706615	2014-02-13 07:43:40 PST	Chemical spill at Wall St	5		No results yet



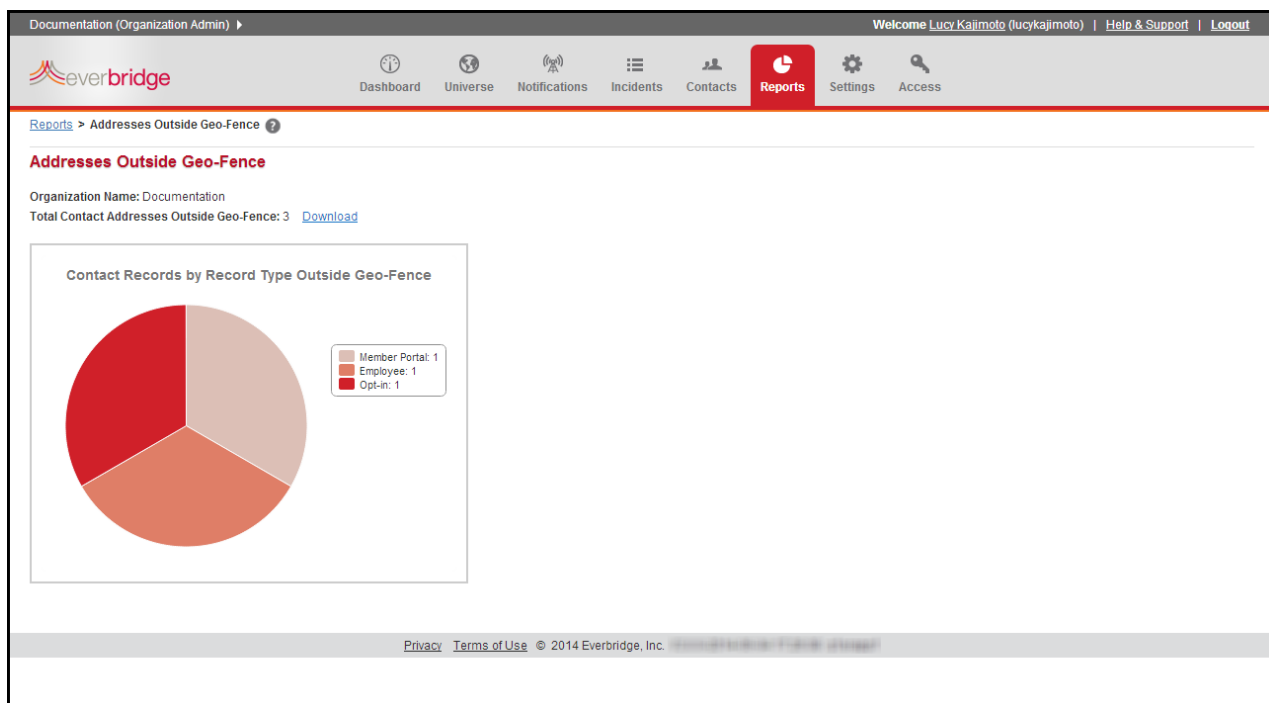
## Addresses Outside Geo-Fence

Use this report if you enabled a geo-fence for your Organization AND you selected the option "Add addresses even if outside the geo-fence".

The Everbridge Suite application will compare all addresses in your contacts to the geo-fence enabled for your Organization. The comma-separated-values (CSV) file available via the "Download" link will contain the contact and any address outside the current geo-fence.

**NOTE:** If you make changes to your geo-fence, then the report will list only addresses that fall outside the geo-fence at the time you run this report

In the following example, three addresses are outside the geo-fence.





Select the Download link to save and open a CSV file (Microsoft Excel spreadsheet) listing the three individual addresses.

The screenshot shows a Microsoft Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	First Name	Middle Initial	Last Name	Suffix	External ID	Country	Business	Record Type	Groups	Location 1	Street Address	Apt/Suite	City 1	State/Province	Postal Code	Country 1	Latitude 1	Longitude 1
2	Happily		Li		Beijing03	CN		Member Portal		Work	53 Dongsi Jiang	22	Beijing	Beijing	100007	CN	39.93245	116.4
3	Linder		Wang		Beijing02	CN		Opt-In		Work	53号 Dong Jian	22 Do	Beijing	Beijing	100007	CN	39.93242	116.4
4	Lemon		Tu		Beijing01	CN		Employee		Work	27号 Dong Jian	22 Do	Beijing	Beijing	100007	CN	39.93186	116.4
5																		
6																		
7																		
8																		
9																		
10																		
11																		
12																		
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25																		
26																		
27																		



# Custom Reports

From the Reports sub-tab, select the existing custom report you want to use or add a new custom report. By adding filters, you limit the report to only the details in which you are interested. If you do not use a filter, your report will contain all the records in the database.

For example, to filter a report to show only the priority notifications, rather than all of the notification types, drag a field to the FILTER panel. Then, select a condition for the field. In this example, the value "is equal to" indicates "true" (versus "false"). Next, enter a Parameter or value to meet the criteria. In this example, type Priority. Finally, click Run Report to preview the results.

You can generate a report on members of a specific group from Custom Reports. Or you can use the Advanced Search feature from the Contacts tab to download a list of members of a specific group. See *Example Using One Filter* on page 139.

## To add a new Custom Report

- 1 From the Reports tab, click add Report.  
The add Custom Report page appears.

**Build**

FIRST: Select a report type, then drag over the fields you want.

Report type: Notifications

**Notification Details**

- Notification ID
- Conference Access Code
- Conference Phone Number
- Confirmation Requested
- Contact Cycles
- Delivery Method(s)
- End Date
- Message Body
- Message Format
- Message Language
- Message Title
- Notification Duration

**DATA** (All the information that will appear in your report)

Remove All

Field

Notification ID

**FILTERS** (OPTIONAL - Parameters you set that will limit the data you see)

Remove All

Field	Condition	Value
Add filters from the list at left (Drag to add)		

Preview Report Export PDF CSV

Save this report

Save

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- 2 On the left-hand pane, select a Report Type from the drop-down list.

**NOTE:** When you add fields to the DATA section, they are added at the bottom of the list. When the fields are displayed in the report, they are displayed left to right. Make sure to add the fields in the order you want them to appear in the report (left to right).



- 3 Select from the details available for the report type you selected, and while holding down the mouse button, drag the data field name to the DATA panel. Release the mouse button.  
(If you change your mind, click the Trash Bin next to the undesired field name.)
- 4 Repeat step 3 for all details you want in your custom report.
- 5 Set filters to narrow down the data to the values in which you are interested. The parameters you set here will limit the data you see. For example, you might only want to see notifications that were started before a certain date.
  - a Select from the details available, and while holding down the mouse button, drag the data field name to the FILTERS panel. Release the mouse button.  
Information in the FILTERS panel is optional.
  - b Select the desired value from the condition (Equation) drop-down list. Depending on the data type of the field — String, Number, or Date — your options differ.
  - c Type the value in the correct format for the data type in the Parameter field. For example, a Date data type must be in YYYY-MM-DD format. This field offers a Calendar icon, from which you can select the desired date. The String data type can be any alphanumeric characters, and the Number data type can be numeric characters.
- 6 Repeat step 5 for each optional FILTER.  
If you change your mind, click the Trash Bin next to the undesired field name.
- 7 Click Run Report to preview the results.  
Use the Page Controls at the bottom of the page to view the records. Use the drop-down list to set the number of records to display on each page. Step through the pages using the page controls (First Page, Previous Page, Next Page, Last Page).
- 8 Continue to add more filters by repeating steps 5 through 7 if you need to reduce or expand the number of records in the results.  
Once the report has been configured and the preview shows you the data you want to see, you can export the results to a PDF file or a Microsoft Excel file. Many software applications, including Microsoft Excel, can open a CSV (Comma-Separated Value) file.
- 9 Select a file type to which to export: PDF or Excel.
- 10 To save the report, type a custom report name and click Save.  
The report is added to the Custom Reports list on the Reports tab. To run the report from the Custom Reports list, click the report name, and when it opens, click Run Report. You can save the report with a different name by typing a new name and clicking Save.



### To delete a single report

- 1 Click the Trash Bin next to the undesired report name.
- 2 Click Yes to confirm the deletion.

### To delete multiple reports

- 1 Select the check box next to each of the report names you want deleted.
- 2 Click the Delete button.
- 3 Click Yes to confirm the deletion.



# User and Role Management

This chapter provides information about User-Role management using the Access tab.

**The following topics are covered:**

- ♦ *Overview*
- ♦ *Managing Users from the Access Tab*
- ♦ *Reviewing Role Types and Permissions*
- ♦ *Uploading Files*



## Overview

A user can be assigned as an Organization Administrator and other roles within the same organization. The Organization Administrator can switch among the different roles to view resources.

If your Account Administrator gives the Organization Administrator access to user and role management, then an Access tab appears in the navigation bar for the organization.

From the Access tab, there are three sub-tabs:

- ♦ **Users:** Displays a list of users of the current organization. Organization Administrators can add users, edit users, and delete users. Users can be disabled and enabled.
- ♦ **Roles:** Displays the roles and their permissions and assigned users of the current organization.  
Select the Permissions Grid link to display a table of all role types and their corresponding permissions at one glance. Refer to *Permissions Grid* on page 254.
- ♦ **Uploads:** Identical to uploading contacts, Organization Administrators can upload users.



# Managing Users from the Access Tab

From the Organization Level, only if given permission, the Organization Administrator can add, edit, or delete users.

**NOTE:** At the Account Level, the Account Administrator manages users and roles. See *Roles* on page 5 and *Managing Users from the Users Tab* on page 23.

To add a user from the Organization Level

- 1 Login as an Organization Administrator.
- 2 Select the Access tab.
- 3 Select the Users sub-tab.
- 4 Click Add User.

The Add User page appears.

- 5 In the General Information pane, type the user name and email address.
- 6 If you have Single Sign-On functionality, type the user's SSO User ID.
- 7 Optionally, click the link: "Link with an existing contact record" to link the user record with a contact record. This link is useful if you want to send messages just to your users, and/or if you plan to allow users to edit their contact information via the private portal.



This contact record must already exist in order to link the record with the user.

The screenshot shows the 'Add User' form in the Everbridge 'Organization Admin' interface. The 'General information' section includes fields for First Name, Middle Initial, Last Name, Suffix, Email Address, SSO User ID, and Contact. The 'Contact' field has a link to 'Link with an existing contact record'. The 'Role information' section includes tabs for Default, Organization, and Role Type, and a dropdown for Dispatcher. A modal window titled 'Link with an existing contact record' is open, showing a search bar and a table of contacts. The table has columns for First Name, Last Name, and External ID. The contacts listed are: Nicholas Allison (MP-0002), Craig Barrick (8185772201), Sharon Bennett (3.22E+18), Scott Colby (8185772220), Brad Currier (8185772321), Cindy Kwok (8185772382), and Sheila Morqan (8185772219). The modal also shows a pagination bar for Page 1 of 10 and a 'View 1 - 9 of 9' indicator. There are 'Link' and 'Cancel' buttons at the bottom of the modal.

First Name	Last Name	External ID
Nicholas	Allison	MP-0002
Craig	Barrick	8185772201
Sharon	Bennett	3.22E+18
Scott	Colby	8185772220
Brad	Currier	8185772321
Cindy	Kwok	8185772382
Sheila	Morqan	8185772219

- a Select the organization in the account where the contact record has been added.
  - b Search for the name of the contact (the user name).
  - c Select the record.
  - d Click Link.  
To break the link between the record and user, in the Contact field, click the Trash Bin.
- 8 In the Role Information pane, select the Role for this user from the drop-down list.
  - 9 Click the link: Add Role.



The role has been assigned to the user.

Documentation (Organization Admin) ▾ Welcome Lucy Kajimoto (lucykajimoto) | [Help & Support](#) | [Logout](#)

Dashboard Universe Notifications Incidents Contacts Reports Settings Access

Users > Add User ?

**General information**

\* First Name  Owner Documentation

Middle Initial

\* Last Name

Suffix  ▾

\* Email Address

SSO User ID

Contact [Link with an existing contact record](#)

**Role information**

Default	Organization	Role Type	Role Name
<input type="radio"/>	Documentation	Organization Admin	Organization Admin

Dispatcher  [Add Role](#)

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- 10 Repeat steps 6 and 7 to add more roles for this user.  
(At the Account Level, the Account Administrator can additionally add organizations and roles.)

Documentation (Organization Admin) ▾ Welcome Lucy Kajimoto (lucykajimoto) | [Help & Support](#) | [Logout](#)

Dashboard Universe Notifications Incidents Contacts Reports Settings Access

Users > Add User ?

**General information**

\* First Name  Owner Documentation

Middle Initial

\* Last Name

Suffix  ▾

\* Email Address

SSO User ID

Contact [Link with an existing contact record](#)

**Role information**

Default	Organization	Role Type	Role Name
<input checked="" type="radio"/>	Documentation	Organization Admin	Organization Admin
<input type="radio"/>	Documentation	Mass Notification Operator	Mass Notification Operator

Dispatcher  [Add Role](#)

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**NOTE:** The user can have multiple roles in an organization.

- 11 Click Save.  
The User Management page is displayed.

## Ownership

If the Account Administrator uploads/creates users, the owner is the account name. If the Organization Administrator uploads/creates users, the owner is the current organization.



If a user has a role in more than one organization, it is automatically owned at the Account Level. Organization Administrators can see these users, but they cannot edit these users, as they are owned at the Account Level. At any time, the Account Administrator can add new roles in different organizations and take ownership of this user.

**ACCOUNT: New US SQA Account (Account Admin)**

Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Notifications Contacts **Users** Roles Settings

Users > Update User

General information

ID: 4402341479772

Username

\* First Name: Michael

Middle Initial:

\* Last Name: Alexander

Suffix: Select...

\* Email Address: Michael.Alexander@Everbridge.com

SSO User ID:

Contact: [Link with an existing contact record](#)

Role information

Default	Organization	Role Type	Role Name
		Account Admin	Account Admin

Save Cancel

Record Information

Created date: 2014-03-20 11:15:17 PDT

Created by: Lucy Kajimoto

Last updated date: 2014-03-20 11:15:17 PDT

Last updated by: Lucy Kajimoto

Registration invites sent:

Expiration date:

Registration success date:

User is not registered

Owner: New US SQA Account

**Documentation (Organization Admin)**

Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe Notifications Incidents Contacts Reports Settings **Access**

Users > Update User

General information

ID: 4402341479510

Username

\* First Name: Lemon

Middle Initial:

\* Last Name: Tu

Suffix: Select...

\* Email Address: Lemon.Tu@Everbridge.com

SSO User ID:

Contact: [Link with an existing contact record](#)

Role information

Default	Organization	Role Type	Role Name
<input type="radio"/>	Documentation	Mass Notification Operator	Mass Notification Operator
<input checked="" type="radio"/>	Documentation	Organization Admin	Organization Admin

Data Manager:  Add Role

Save Cancel

Record Information

Created date: 2014-01-20 09:19:01 PST

Created by: Lucy Kajimoto

Last updated date: 2014-03-11 09:58:24 PDT

Last updated by: Lucy Kajimoto

Registration invites sent:

Expiration date:

Registration success date:

User is not registered

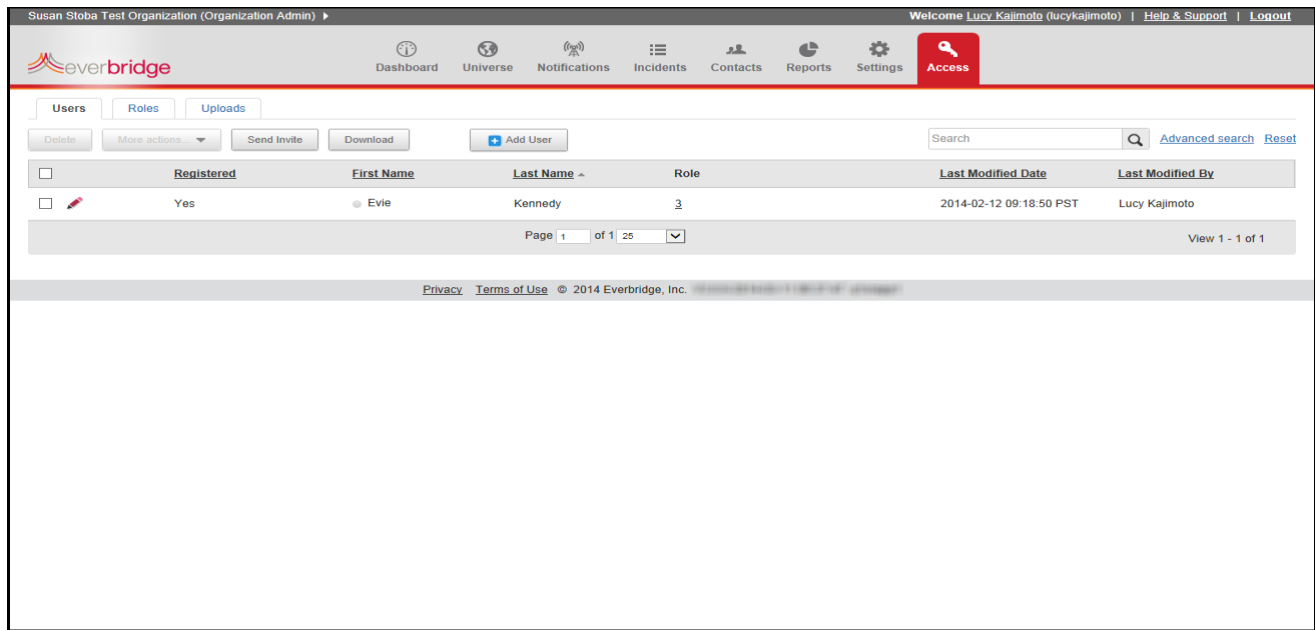
Owner: Documentation






## User Management

The User Management page displays a list of users of the current organization. You can see if the users are registered, their names, the number of roles per user, the last date modified, and by whom the record was modified. Organization Administrators can manage users; that is, add users, edit users, and delete users.

**NOTE:** To upload a batch of users from the Organization Level, see *Uploading Files* on page 256.



User Status	Description
<div>Envelope</div>	<p>The user is not yet registered. You will need to send an invitation to the user, asking him or her to register.</p> <p>Select the check boxes in the rows containing the users' names and click Send Invite. Or, click the Envelope icon in the row containing an individual user's name. When the user receives the email, he or she can select the link to go directly to the Registration page. Once registered, the user becomes active and can use the system.</p>
<div>Grey circle</div>	<p>The user is active, but not currently logged in.</p>
<div>Green circle</div>	<p>The user is active, and currently logged in.</p>

### To use Advanced search

You can use the Search feature to find a user by First Name or Last Name. To search by other filters, use the Advanced search feature.

- 1 From the Users tab, click the link: Advanced search.





The Advanced Search pane appears.

The screenshot shows the Everbridge Users page with the Advanced Search pane open. The pane has a table with columns: Field, Condition, and Value. Below the table is a search bar with a dropdown menu labeled 'Add Filter Search:'. The dropdown menu is open, showing a list of fields: First Name, Last Name, Middle Initial, Suffix, Email, Linked Contact, Created Date, Last Updated Date, Registration Invites Sent, Registration Success Date, Created By, Last Updated By, Role, Registration Status, and User Name. The main table below the pane shows a list of users with columns: Registered, First Name, Last Name, Role, Last Modified Date, and Last Modified By. The table contains three rows of user data.

Registered	First Name	Last Name	Role	Last Modified Date	Last Modified By
Yes	Lucy	Kajimoto	2	2014-03-11 11:08:03 PDT	Lucy Kajimoto
	Lemon	Tu	2	2014-03-11 09:58:24 PDT	Lucy Kajimoto
	Lemon	Tu	2	2014-03-19 14:53:24 PDT	Lucy Kajimoto

- From the Add Filter Search field, select the desired field from the drop-down list.

The screenshot shows the Everbridge Users page with the Advanced Search pane open. The dropdown menu is open, showing a list of fields: First Name, Last Name, Middle Initial, Suffix, Email, Linked Contact, Created Date, Last Updated Date, Registration Invites Sent, Registration Success Date, Created By, Last Updated By, Role, Registration Status, and User Name. The main table below the pane shows a list of users with columns: Registered, First Name, Last Name, Role, Last Modified Date, and Last Modified By. The table contains three rows of user data.

Registered	First Name	Last Name	Role	Last Modified Date	Last Modified By
Yes	Lucy	Kajimoto	2	2014-03-11 11:08:03 PDT	Lucy Kajimoto
	Lemon	Tu	2	2014-03-11 09:58:24 PDT	Lucy Kajimoto
	Lemon	Tu	2	2014-03-19 14:53:24 PDT	Lucy Kajimoto



- 3 Depending on the field you select, a Condition drop-down list and Value (either a text box or list from which to choose).
  - a Select the Condition.
  - b Type or select the Value.
- 4 Click Search.  
The users matching your filtered search are displayed below the Advanced Search pane.

The screenshot shows the Everbridge Users management interface. At the top, there's a navigation bar with icons for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings, and Access. Below this is a tabbed interface with 'Users', 'Roles', and 'Uploads'. The 'Users' tab is active, and an 'Advanced Search' modal is open. The modal has three columns: 'Field', 'Condition', and 'Value'. The 'Field' column has a dropdown menu with 'Role' selected. The 'Condition' column has a dropdown menu with 'contains' selected. The 'Value' column has a list of roles: Data Manager, Dispatcher, Group Mgr-School Districts (highlighted), Incident Administrator, Incident Operator - Airside, Incident Operator - Internal, MN Operator, Mass Notification Operator, and Organization Admin. Below the modal, there's a 'Search' button and a 'Clear' button. The main content area shows a table of users with columns: Registered, First Name, Last Name, Role, Last Modified Date, and Last Modified By. The table contains one user: Lucy Kajimoto, Role 2, Last Modified Date 2014-03-11 11:00:03 PDT, Last Modified By Lucy Kajimoto. The table is paginated, showing Page 1 of 1, 25 items per page. At the bottom, there's a footer with 'Privacy Terms of Use © 2014 Everbridge, Inc.' and a link to 'Everbridge Suite'.

Registered	First Name	Last Name	Role	Last Modified Date	Last Modified By
Yes	Lucy	Kajimoto	2	2014-03-11 11:00:03 PDT	Lucy Kajimoto



### To edit a user profile from the Organization Level

- 1 Login as an Organization Administrator.
- 2 Select the Access tab.
- 3 Select the Users sub-tab.
- 4 Click the Pencil icon next to the user's name that you want to modify.  
The Update User page is displayed.
- 5 Make your changes.  
See step 5 through step 11 of the procedure *To add a user from the Organization Level* on page 241.
- 6 Click Save.

### To delete a user from the Organization Level

- 1 Login as an Organization Administrator.
- 2 Select the Access tab.
- 3 Select the Users sub-tab.
- 4 Click the check box in the row containing the specific name, and click Delete. (Or, you can edit the user's profile, then click Delete from the Update User page.)
- 5 Click Yes to confirm the deletion.

### To temporarily disable a user at the Organization Level

To disable users so they cannot log in, but without deleting their records, perform the following steps. Use this procedure to enable a disabled user as well.

- 1 Login as an Organization Administrator.
- 2 Select the Access tab.
- 3 Select the Users sub-tab.
- 4 Click the Pencil icon next to the user's name that you want to modify.  
The Update User page is displayed.
- 5 Click Enable/Disable.
- 6 Confirm the inactivation.  
The user's name is grayed out on the list.

To return to Active status, return to the user's Update User page and click Enable/Disable. Be sure to confirm the change.



Susan Stoba Test Organization (Organization Admin) ▶ Welcome Lucy Kajimoto (lucykajimoto) | [Help & Support](#) | [Logout](#)

Dashboard Universe Notifications Incidents Contacts Reports Settings **Access**

[Users](#) > **Update User** ?

Enable/Disable

Send Forgot Password Email

Delete

**General information**

ID: 4402341479314 Owner Susan Stoba Test Organization

Username: eviecameron

\* First Name

Middle Initial

\* Last Name

Suffix

\* Email Address

Contact [Link with an existing contact record](#)

**Record Information**

Created date: 2013-10-03 13:01:12 PDT

Created by: Susan Stoba

Last updated date: 2014-02-12 09:18:50 PST

Last updated by: Lucy Kajimoto

Registration invites sent: 2013-10-03 13:01:59 PDT

Registration success date: 2013-10-03 13:04:35 PDT

● User is offline

**Role information**

Default	Organization	Role Type	Role Name	
<input checked="" type="radio"/>	Susan Stoba Test Organization	Organization Admin	Organization Admin	
<input type="radio"/>	Susan Stoba Test Organization	Data Manager	Data Manager	
<input type="radio"/>	Susan Stoba Test Organization	Group Leader	Group Manager	

Dispatcher - Chemical Spills

Save

Cancel

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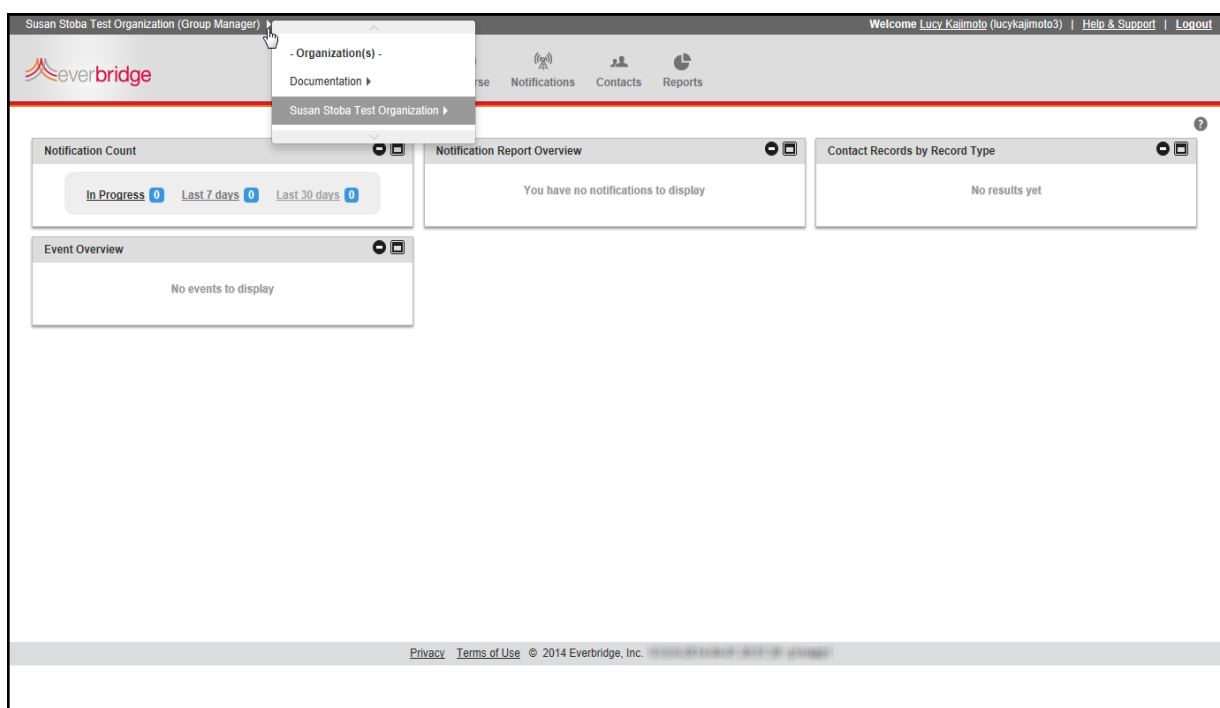
**NOTE:** If you are using Single Sign-On (SSO), you must upload with a role. If you are not using SSO, you can upload without defining a role.



## To select your organization and role

Users could have multiple roles in an organization. If so, they can perform the following steps to select an organization and role different from the default.

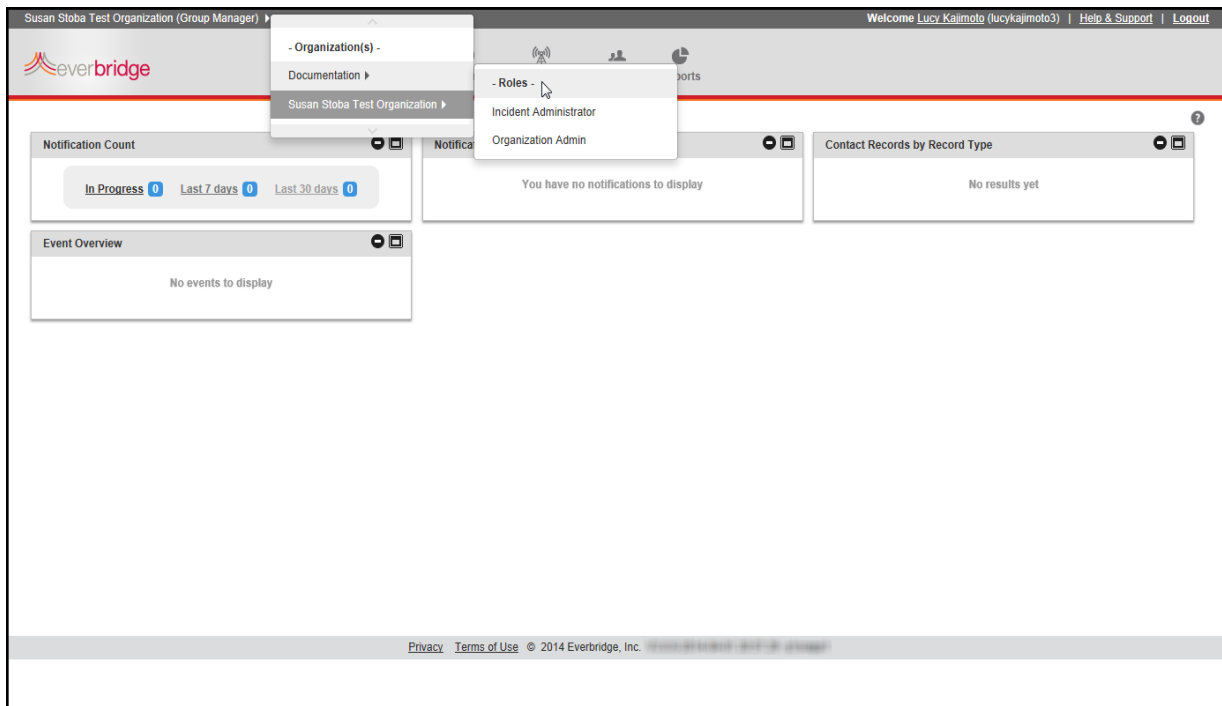
- 1 Verify that you are using the desired organization and role.  
When you login, the default organization and role appears in the top left-hand corner of the screen.
- 2 To change the organization, if you are assigned more than one organization, select the Right arrow that is located just after the account/organization (role) name.  
The Organization(s) menu appears.



- 3 Hover the cursor over the desired organization name.

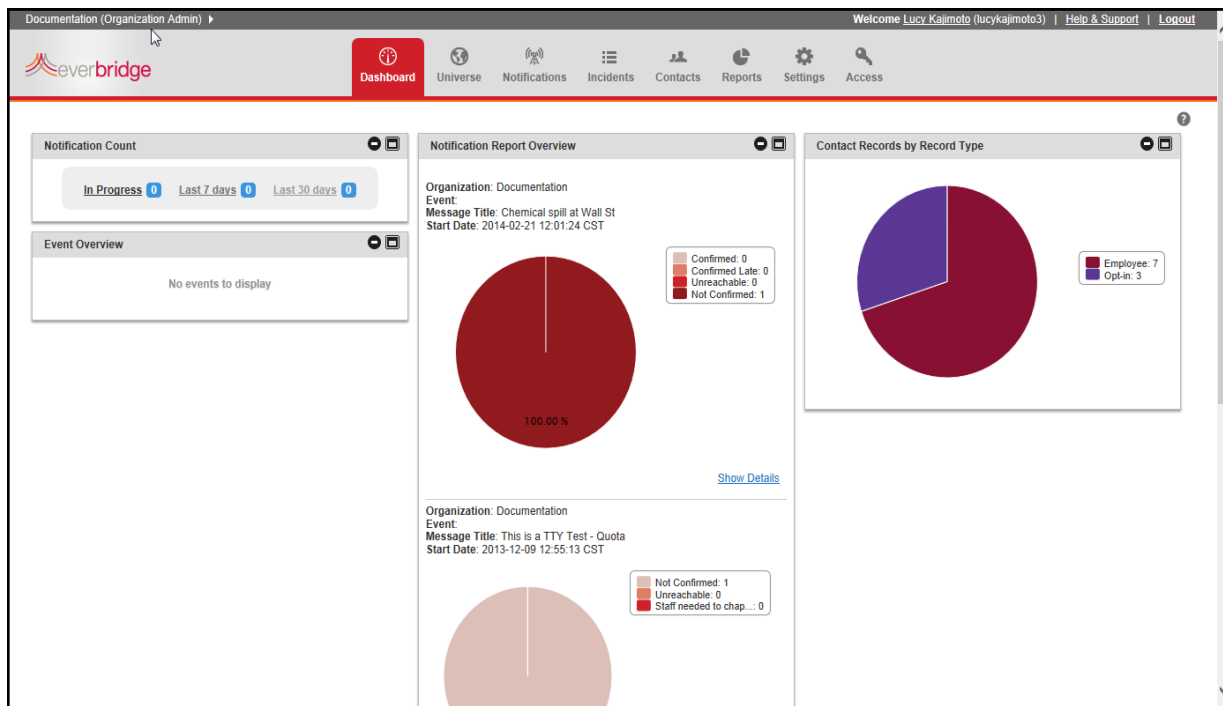


The roles to which you are assigned are displayed in the Role(s) menu. The role that you are currently using is highlighted.



#### 4 Select the desired role.

The updated organization (role) is displayed in the top left-hand corner of the screen.





# Reviewing Role Types and Permissions

In the Access tab, select the Roles tab and then the desired role to review the its corresponding permissions for the organization.

The screenshot displays the Everbridge Roles and Permissions page. On the left, a sidebar lists various roles under the 'Role Type' section. The main content area is titled 'What are users in this role allowed to do?' and lists permissions categorized by function. The categories and their permissions are as follows:

- Access**
  - Use Role management
- Dashboard**
  - View notification and incident dashboards
- Incident**
  - Access Twitter alerts
  - Access weather alerts
  - Access NCA alerts (Premium)
  - Send a notification from the Universe to contacts selected on the map
  - Notification button widget
  - Use selection tools to highlight contacts on the map
  - Access Mobile Member messages
- Notification**
  - Publish to Alertus
  - Publish to Web Posting
  - Publish to the Everbridge Network
  - Publish to CMAA/WEA
  - Create a new notification - send now, schedule, save as template, Send follow-up
  - Manage ad-hoc notifications (including info, rebroadcast)
  - Manage scheduled and recurring notifications
  - Edit/Delete an existing notification template
  - Send an existing notification template
  - Edit Notification settings: Message content & Contacts
  - Mobile Watcher
  - Create, edit and delete message templates
- Incident**
  - Launch and manage incidents
  - Create, edit and delete incident templates
  - Create, edit and delete information variables
- Contact**
  - Schedule Management
    - Create, edit and delete schedules
  - Contact Management
    - View Name and External ID ONLY
    - View and download ALL contact information
    - View, download and edit ALL contact information
    - Upload contacts
    - Create contacts
    - Delete contacts
  - Group Management
    - Create, edit and delete Groups
    - Add contacts to Groups
    - Move and Remove contacts from Groups
  - Role Management
    - Create, edit and delete rules
- Report**
  - View Quick Reports
  - Create, edit and delete Incident Custom Reports
  - Create, edit and delete Incident Notification Custom Reports
  - Create, edit and delete Notification Custom Reports
  - Create, edit and delete Contact Custom Reports
- Organization Settings**
  - Organization - Edit base information and login message
  - Secure Messaging
  - GIS - Edit default map views, manage shape library and import region files
  - Interactive Visibility - Turn weather/Twitter/mobile alerts/NCA alerts on/off, and create new alerts
  - Broadcast - Edit the default settings (sender info, delivery methods, etc.) applied to all notifications across the organization
  - Contact and Groups - Create record types, additional information questions and subscription fields
  - Member Portal - Edit the setup, design and contents of the organization's Member Portal
  - Custom Map
  - Print Address Geo-Coding
- Member Manager**
  - Send a notification
  - Send a notification using a template
  - Rebroadcast a notification
  - Send a notification Follow-up
  - Stop an Active notification



## Permissions Grid

From the Roles sub-tab, select the Permissions Grid link to display a PDF of all role types and their corresponding permissions at one glance. Page 1 shows the Account Level and the other pages show the Organization Level.

Permissions Grid									
	ACCOUNT ADMIN	ORGANIZATION ADMIN	INCIDENT ADMIN	GROUP MANAGER	DISPATCHER	DATA MANAGER	MASS NOTIF OPERATOR	INCIDENT OPERATOR	
<b>Cross Organization Notification</b>									
Send notifications to contacts in any organization	X								
<b>Contact Upload</b>									
Upload and view contacts in any organization	X								
<b>User Management</b>									
Create, edit, delete and enable/disable users in any organization	X								
<b>Role Management</b>									
Assign permissions and resources to the users created/managed under the User Management tab	X								
<b>Account Setting</b>									
Notifications: Specify settings that are applied to all broadcasts in all organizations	X								
Contacts: Specify settings that are applied to all contacts and groups in all organizations	X								
Single Sign-On	X								

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Permissions Grid									
	ACCOUNT ADMIN	ORGANIZATION ADMIN	INCIDENT ADMIN	GROUP MANAGER	DISPATCHER	DATA MANAGER	MASS NOTIF OPERATOR	INCIDENT OPERATOR	
<b>Access</b>									
User/Role management	X	Configure							
<b>Dashboard</b>									
View notification and incident dashboard	X	X	X	X	X				
<b>Universe</b>									
Access Twitter alerts	X	X		X	X				
Access weather alerts	X	X		X	X				
Access NC4 alerts	X	X		X	X				
Use selection tools to highlight contacts on the map	X	X		X	X				
Access Mobile Member messages	X	X		X	X				
Send a notification from the Universe to contacts selected on the map	X	X		X	X				
Notification button widget	X	X		X	X				
<b>Notification</b>									
Publish to Alertus	X	X		X	X				
Publish to Web Posting	X	X		X	X				
Publish to Everbridge Network	X	X		X	X				
Publish to CMAS/VEA	X	X		X	X				
Create a new notification - send now, schedule, save as template, send follow-up	X	X		X	X				
Manage active/sent notifications (including stop, rebroadcast)	X	X		X	X		X		
Manage scheduled and recurring notifications	X	X		X	X				
Edit/Delete an existing notification template	X	X		X	X				
Send an existing notification template	X	X		X	X		X		
Edit Notification settings: Message content & Contacts	X	X		X	X				
Mobile Website	X	X		X	X		X		
Create, edit and delete message templates	X	X		X	X				

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## Permissions Grid

	ACCOUNT ADMIN	ORGANIZATION ADMIN	INCIDENT ADMIN	GROUP MANAGER	DISPATCHER	DATA MANAGER	MASS NOTIF OPERATOR	INCIDENT OPERATOR
<b>Incident</b>								
Launch and manage incidents	X	X	X					X
Create, edit and delete incident templates	X	X	X					
Create, edit and delete information variables	X	X	X					
<b>Contact</b>								
<b>SCHEDULE MANAGEMENT</b>								
Create, edit and delete schedules	X	X		Configure				
<b>CONTACT MANAGEMENT</b>								
View name and External ID ONLY	X	X	X	X		X		
View, download all contact information	X	X	X	Configure		X		
View, download and edit all contact information	X	X	X	Configure		X		
Upload contacts	X	X	X	Configure		X		
Create contacts	X	X	X	Configure		X		
Delete contacts	X	X	X	Configure		X		
<b>GROUP MANAGEMENT</b>								
Create, edit and delete Groups**	X	X	X	Configure		X		
Add contacts to Groups**	X	X	X	Configure		X		
Move and remove contacts from Groups**	X	X	X	Configure		X		
<b>RULE MANAGEMENT</b>								
Create, edit and delete rules	X	X	X	X		X		
<b>Report</b>								
View Quick Reports	X	X		X				
Create, edit and delete Incident Custom Reports	X	X	X					
Create, edit and delete Incident Notification Custom Reports	X	X	X					
Create, edit and delete Notification Custom Reports	X	X		X				
Create, edit and delete Contact Custom Reports	X	X	X	X		X		

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## Permissions Grid

	ACCOUNT ADMIN	ORGANIZATION ADMIN	INCIDENT ADMIN	GROUP MANAGER	DISPATCHER	DATA MANAGER	MASS NOTIF OPERATOR	INCIDENT OPERATOR
<b>Organization Settings</b>								
Organization - Edit base information and login message	X	X						
Secure Messaging	X	X						
Map - Edit default map views, custom map, point-address geo-coding, manage shape library and import region files	X	X	X					
Interactive Visibility - Turn weather/Twitter/mobile/NC4 alerts on/off, and create new alerts	X	X						
Broadcast - Edit the default settings (sender info, delivery methods, etc.) applied to all notifications across the organization	X	X						
Contact and Groups - Create record types, additional information questions and subscription fields	X	X				X		
Member Portal - Edit the setup, design and contents of the organization's Member Portal	X	X						
<b>Mobile Manager</b>								
Send a notification	X	X		X	X			
Send a notification using a template	X	X		X	X		X	
Redroadcast a notification	X	X		X	X		X	
Send a notification Follow-up	X	X		X	X			
Stop an Active notification	X	X		X	X		X	

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# Uploading Files

You can upload a .csv file, tar.gz file, or compressed (.zip) file. The maximum .csv, tar.gz, or .zip file is 100 MB. When more than 100 MB, use Secure FTP. The rules and operations of uploading users are the same as uploading contacts at the Organization level. See the following sections of *Chapter 5, Contacts*:

- ◇ *Preparing to Upload Contacts* on page 168 and *Upload File Details* next
- ◇ *Uploading a Contact Data File Manually* on page 209
- ◇ *Uploading a Contact Data File Via Secure FTP* on page 220

## Upload File Details

### Organization Level

Organization Administrators can upload users with multiple roles in their organization. The following table provides details about the column headings, from left to right, in the *org\_user\_upload\_sso\_template.csv* file. The column headings must not be changed! If you use your own spreadsheet, make sure your column headings use the exact case-sensitive spelling and spaces.

Field	Required	Comments
First Name	Y	
Middle Initial	N	
Last Name	Y	
Suffix	N	
Email	Y	
SSO User ID	Y, for SSO only	Required for SSO only
External ID	Y	Required for "Link with an existing contact record"
Role Names	N	You must include a role with SSO uploads  You can have multiple role names per Organization. Separate role names using the pipe ( ) character. For example, for Organization Administrator Bob Smith, his Roles Names cell contains the following: <b>Dispatcher Group Manager</b> . Bob Smith has two roles in organization "Airport Operations".
END	N	Although not required, it is a recommended technique to include "END" at the end of every row. (In a spreadsheet, it is the last column heading.)



## Account Level

Account Administrators can upload users in different organizations with multiple roles. The following table provides details about the column headings, from left to right, in the *account\_user\_upload\_sso\_template.csv* file. The column headings must not be changed! If you use your own spreadsheet, make sure your column headings use the exact case-sensitive spelling and spaces.

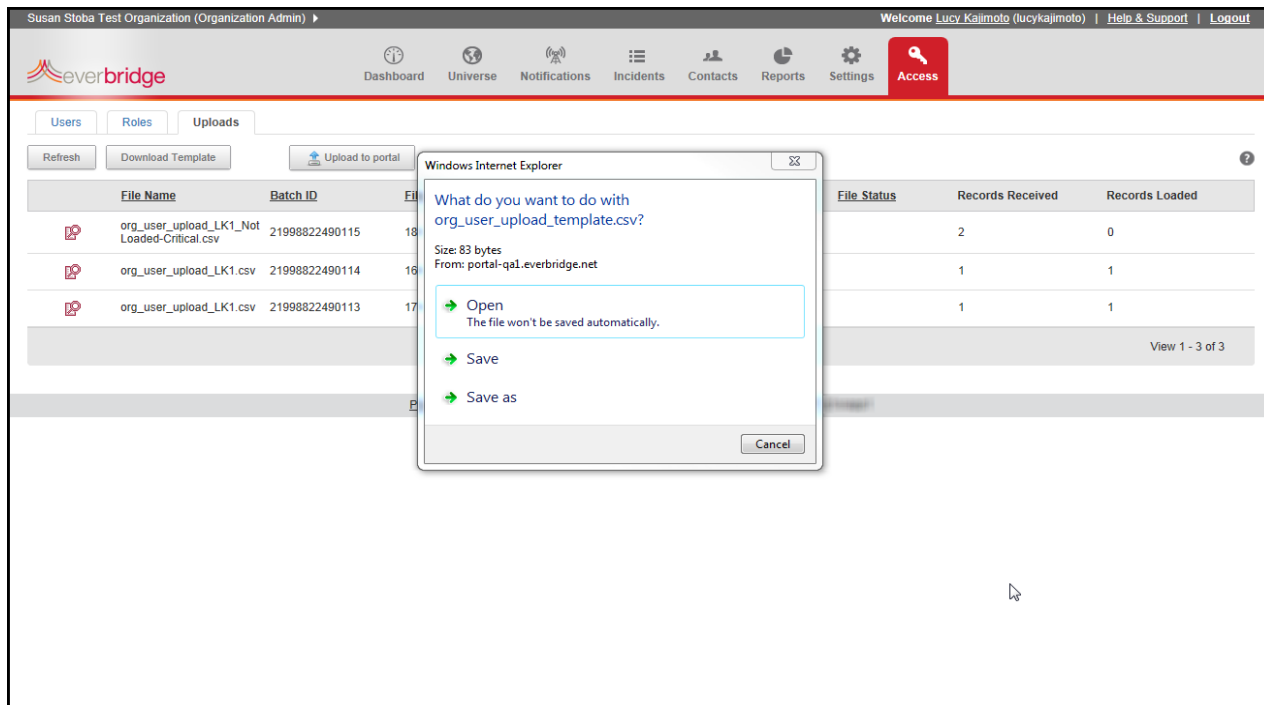
Field	Required	Comments
First Name	Y	
Middle Initial	N	
Last Name	Y	
Suffix	N	
Email	Y	
SSO User ID	Y, for SSO only	Required for SSO only
External ID	Y	Required for "Link with an existing contact record"
External ID ORG	N	The Organization associated with the contact information.
Org Name 1	N	Required if Role Names 1 is not empty
	Y	Required if External ID is not empty
Role Names 1	N	Required if SSO User ID is not empty
		You can have multiple role names per Organization. Separate role names using the pipe ( ) character. For example, for Bob Smith, his Role Names 1 cell contains the following: <b>Dispatcher Group Manager</b> .
Org Name 2	N	You can designate an Organization with no defined role
	Y	Required for External ID "Link with an existing contact record"
Role Names 2	N	You cannot have a role without an Organization
		You must include a role with SSO uploads
		You can have multiple role names per Organization. Separate role names using the pipe ( ) character. For example, for Organization Administrator Bob Smith, his Roles Names cell contains the following in "IT Division": <b>Data Manager Group Manager</b> . Bob Smith has two roles in "IT Division".
END	N	Although not required, it is a recommended technique to include "END" at the end of every row. (In a spreadsheet, it is the last column heading.)



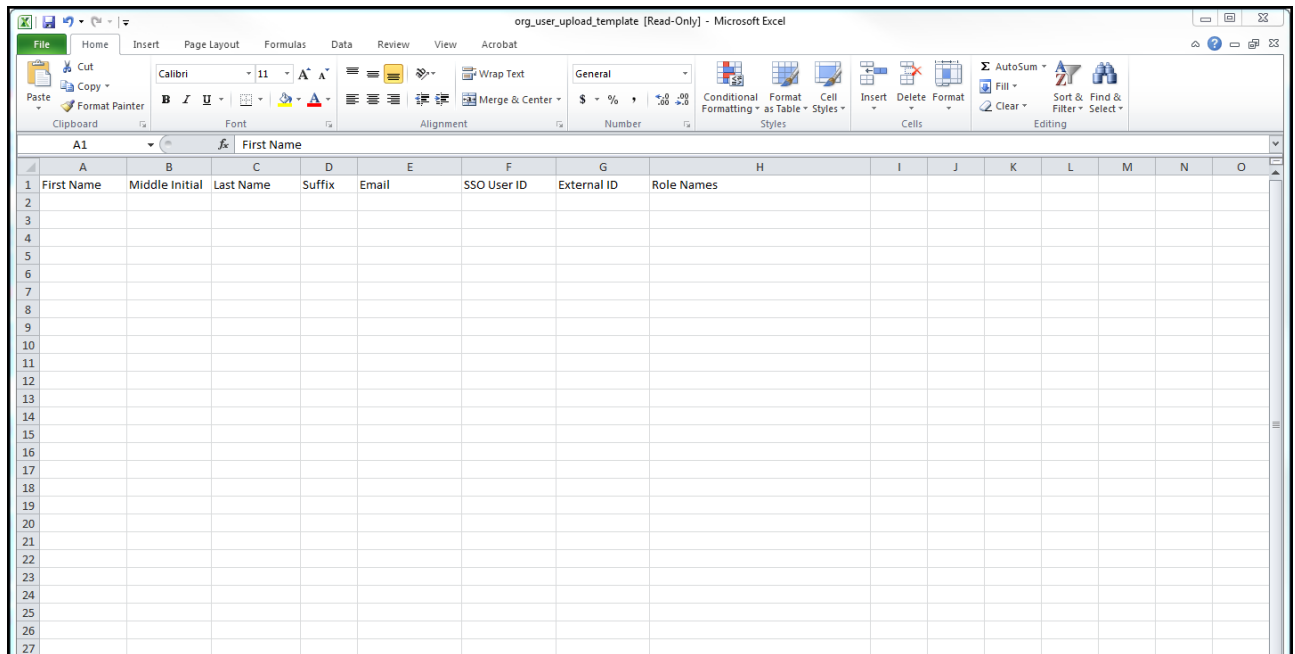
## To download the CSV template

**NOTE:** At the Organization Level, start from Access > Uploads. At the Account Level, start from Users > Uploads. The following examples are from the Organization Level.

- 1 From the Uploads sub-tab, click Download Template.



- 2 Respond to the question: What do you want to do with org\_user\_upload\_template.csv (or, at the Account Level, What do you want to do with the account\_user\_upload\_template.csv)? You can:
  - Open—Open the file so you can add organizations and users to the template, then save it. (This procedure continues after you open the file. Go to the next step.)
  - Save—Save the csv file with the same name.
  - Save As—Rename the csv file and save it.



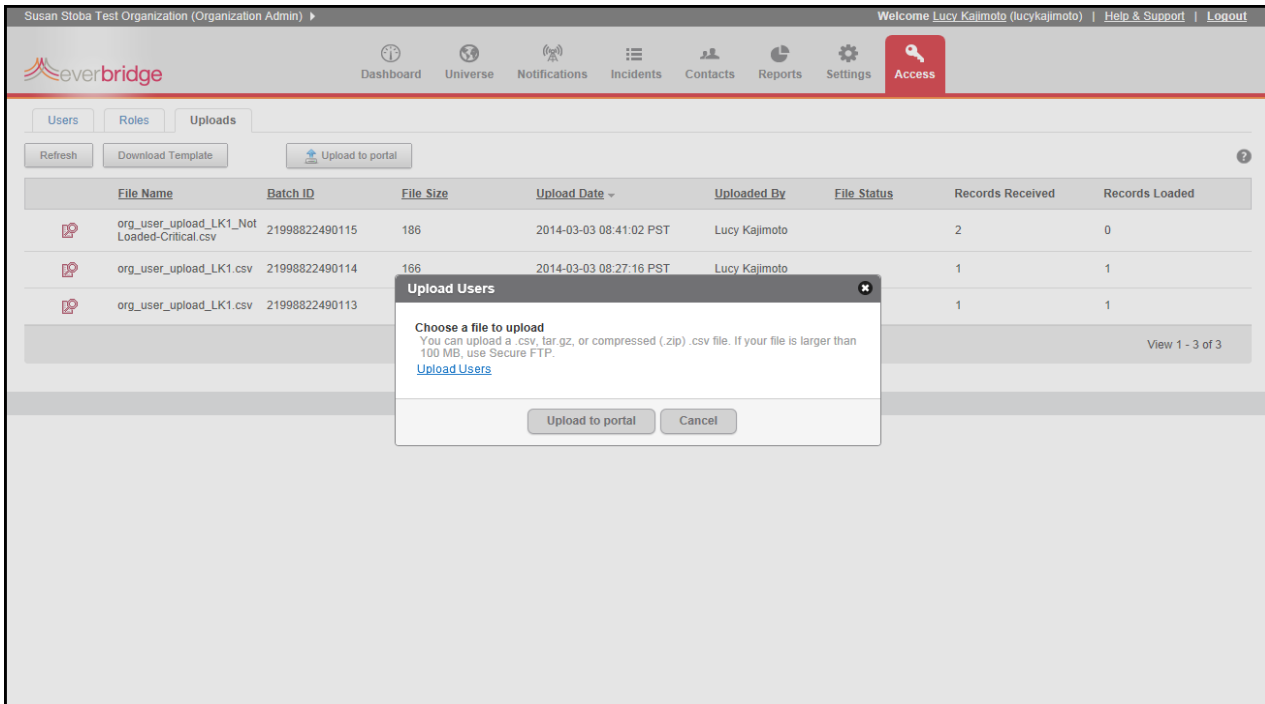
- 3 Enter the information, one user per row, using the information from the *Upload File Details* on page 256.
- 4 Click Save As and rename the file.
- 5 Continue to the procedure *To upload your CSV file*, next.



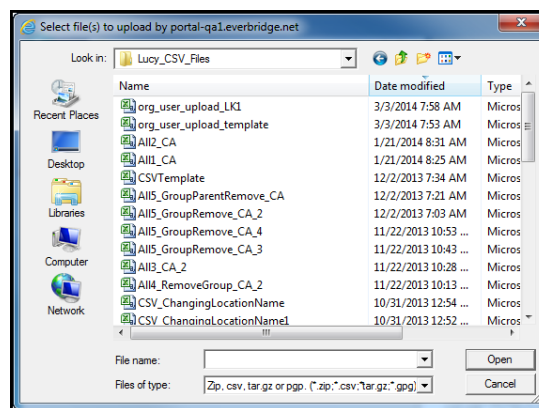
## To upload your CSV file

**NOTE:** At the Organization Level, start from Access > Uploads. At the Account Level, start from Users > Uploads. The following are examples when uploading from the Organization Level.

- 1 From the Uploads sub-tab, click Upload to portal.  
The Upload Users dialog is displayed.



- 2 Select the Upload Users link.  
The Select file(s) to upload by ... dialog appears.





- 3 Navigate to the desired CSV file and double-click its upload name. The selected upload name appears in the Upload Users dialog.

The screenshot shows the Everbridge 'Uploads' page. A table lists several CSV files. An 'Upload Users' dialog box is open, showing the selected file 'org\_user\_upload\_LK1.csv' and a 'Complete' status. The dialog has 'Upload to portal' and 'Cancel' buttons.

File Name	Batch ID	File Size	Upload Date	Uploaded By	File Status	Records Received	Records Loaded
org_user_upload_LK1_Not Loaded-Critical.csv	21998822490115	186	2014-03-03 08:41:02 PST	Lucy Kajimoto		2	0
org_user_upload_LK1.csv	21998822490114	166	2014-03-03 08:27:16 PST	Lucy Kajimoto		1	1
org_user_upload_LK1.csv	21998822490113					1	1

- 4 Click Upload to Portal. You see an Alert dialog indicating the upload of the file has started.

The screenshot shows the Everbridge 'Uploads' page after clicking 'Upload to Portal'. An 'Alert' dialog box is open, displaying the message 'We have started uploading your file.' with an 'OK' button. The table in the background shows the file status updated to 'Inprocess'.

File Name	Batch ID	File Size	Upload Date	Uploaded By	File Status	Records Received	Records Loaded
org_user_upload_LK1.csv	21998822490116	166	2014-03-11 10:21:09 PDT	Lucy Kajimoto	Inprocess	0	0
org_user_upload_LK1_Not Loaded-Critical.csv	21998822490115	186	2014-03-03 08:41:02 PST	Lucy Kajimoto		2	0
org_user_upload_LK1.csv	21998822490114	166				1	1
org_user_upload_LK1.csv	21998822490113	174				1	1



## 5 Click OK.

The upload is listed in the Uploads sub-tab page. You can see the File Status.

Susan Stoba Test Organization (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe Notifications Incidents Contacts Reports Settings Access

Users Roles Uploads

Refresh Download Template Upload to portal

File Name	Batch ID	File Size	Upload Date	Uploaded By	File Status	Records Received	Records Loaded
org_user_upload_LK1.csv	21998822490116	166	2014-03-11 10:21:09 PDT	Lucy Kajimoto	inprocess	0	0
org_user_upload_LK1_Not Loaded-Critical.csv	21998822490115	186	2014-03-03 08:41:02 PST	Lucy Kajimoto		2	0
org_user_upload_LK1.csv	21998822490114	166	2014-03-03 08:27:16 PST	Lucy Kajimoto		1	1
org_user_upload_LK1.csv	21998822490113	174	2014-03-03 08:06:28 PST	Lucy Kajimoto		1	1

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## 6 Click Refresh to refresh the file status.

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Dashboard Universe Notifications Incidents Contacts Reports Settings Access

Users Roles Uploads

Refresh Download Template Upload to portal

File Name	Batch ID	File Size	Upload Date	Uploaded By	File Status	Records Received	Records Loaded
org_user_upload_LK1.csv	21998822490116	166	2014-03-11 10:21:09 PDT	Lucy Kajimoto	completed	1	1
org_user_upload_LK1_Not Loaded-Critical.csv	21998822490115	186	2014-03-03 08:41:02 PST	Lucy Kajimoto		2	0
org_user_upload_LK1.csv	21998822490114	166	2014-03-03 08:27:16 PST	Lucy Kajimoto		1	1
org_user_upload_LK1.csv	21998822490113	174	2014-03-03 08:06:28 PST	Lucy Kajimoto		1	1

Page 1 of 1 25 View 1 - 4 of 4

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## To view the upload details

Susan Stoba Test Organization (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

everbridge Dashboard Universe Notifications Incidents Contacts Reports Settings Access

Users Roles Uploads

Refresh Download Template Upload to portal

	File Name	Batch ID	File Size	Upload Date	Uploaded By	File Status	Records Received	Records Loaded
	org_user_upload_LK1.csv	21998822490116	166	2014-03-11 10:21:09 PDT	Lucy Kajimoto	completed	1	1
	org_user_upload_LK1_Not Loaded-Critical.csv	21998822490115	186	2014-03-03 08:41:02 PST	Lucy Kajimoto		2	0
	org_user_upload_LK1.csv	21998822490114	166	2014-03-03 08:27:16 PST	Lucy Kajimoto		1	1
	org_user_upload_LK1.csv	21998822490113	174	2014-03-03 08:06:28 PST	Lucy Kajimoto		1	1

Page 1 of 1, 25 View 1 - 4 of 4

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- 1 Click the View icon to the left of the desired File Name.

Susan Stoba Test Organization (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

everbridge Dashboard Universe Notifications Incidents Contacts Reports Settings Access

User Upload > User Upload Detail

Refresh

File Name org\_user\_upload\_LK1.csv  
Batch ID 21998822490116  
Sender Lucy Kajimoto  
Status completed  
Records Received 1

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

First Name	M.I.	Last Name	External ID	Email
Lucy		Kajimoto		Lucy.Kajimoto@Everbridge.com

Page 1 of 1, 25 View 1 - 1 of 1

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- 2 As needed, select each sub-tab to see the user names of the upload results.



- 3 Click the View icon next to the desired user name to see further details.  
The user records that were received are listed on one of the three results tabs:
  - Loaded without error—Records loaded normally.
  - Loaded with error—Records that had something incorrect, but there was enough good information to load them anyway.
  - Not Loaded - Critical Error—Records that had errors so severe that they were not loaded.
- 4 See the following example results.
  - Loaded without error (*nn*), where *nn* is the number of contacts loaded without error. Clicking the View icon next to a user's name displays the contact information. The following example shows the individual user, Lucy Kajimoto, loaded without error.

**General information**

First Name	Lucy
Middle Initial	
Last Name	Kajimoto
Suffix	
Email Address	Lucy.Kajimoto@Everbridge.com
SSO User ID	
Contact	

**Role information**

Role Name	Organization Admin/Group Managem
-----------	----------------------------------

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- Loaded with error (*nn*), where *nn* is the number of users loaded with errors. The following example shows one user loaded with error. The Error Message is: `ROLE_NOT_EXIST: Role is not exist`. In this case, at the Account Level, configure the Roles > Organization by adding the role or ensuring the CSV file uses the exact spelling of the role name.



Susan Stoba Test Organization (Organization Admin)

Welcome Lucy Kajimoto (lucykajimoto) | [Help & Support](#) | [Logout](#)

Dashboard

Universe

Notifications

Incidents

Contacts

Reports

Settings

Access

User Upload > User Upload Detail ?

Refresh

File Name

org\_user\_upload\_LK1.csv

Batch ID

21998822490113

Sender

Lucy Kajimoto

Status

null

Records Received

1

Loaded without error (0)

Loaded with error (1)

Not loaded - critical error (0)

First Name ^	M.I.	Last Name	External ID	Email	Error Message
Lucy		Kajimoto		Lucy.Kajimoto@Everbridge.com	ROLE_NOT_EXIST: Role does not exist.

Page 1 of 1 25

View 1 - 1 of 1

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- Not loaded - critical (*nn*), where *nn* is the number of users not loaded from the CSV file. The following example shows 2 users not loaded. The Error Message is: CELL\_CANNOT\_BE\_EMPTY: Email cannot be empty. (The other error message is identical to the Loaded with Error message previously discussed.) In this case, add the “Email” addresses to the CSV file and upload to the portal again.

The screenshot shows the 'User Upload > User Upload Detail' page in the Everbridge portal. The page header includes the Everbridge logo and navigation tabs: Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings, and Access. The user is logged in as Lucy Kajimoto. The main content area displays details for the upload file 'org\_user\_upload\_LK1\_NotLoaded-Critical.csv', including Batch ID 21998822490115, Sender Lucy Kajimoto, Status null, and 2 Records Received. Below this, there are tabs for 'Loaded without error (0)', 'Loaded with error (0)', and 'Not loaded - critical error (2)'. The 'Not loaded - critical error (2)' tab is active, showing a table with 2 rows of failed uploads. The first row is for Sharon Bennett, with an error message 'CELL\_CANNOT\_BE\_EMPTY: undefined' and 'ROLE\_NOT\_EXIST: Role does not exist'. The second row is for Sheila Morgan, with an error message 'CELL\_CANNOT\_BE\_EMPTY: undefined'. The page also includes a pagination control showing 'Page 1 of 1' and a 'View 1 - 2 of 2' link.

First Name	M.I.	Last Name	External ID	Email	Error Message
Sharon		Bennett			CELL_CANNOT_BE_EMPTY: undefined ROLE_NOT_EXIST: Role does not exist. ROLE_NOT_EXIST: Role does not exist.
Sheila		Morgan			CELL_CANNOT_BE_EMPTY: undefined

- 5 Click the Close (X) in the upper right-hand corner of the page to return to the Upload Results.  
If your browser is configured to “open in new tab,” you will see two Contacts tabs in the browser. The one to close is the right-most one. If your browser is configured to “open in new window,” simply close that window.

# Mobile Manager

This chapter provides information about using Everbridge Mobile Manager from your mobile device.

**The following topics are covered:**

- ♦ *Overview*
- ♦ *Getting Started With Mobile Manager*
- ♦ *Initiating a New Notification from Mobile Manager*
- ♦ *Sending the Notification from Mobile Manager*
- ♦ *Sending Notification Templates from Mobile Manager*
- ♦ *Viewing Reports in Mobile Manager*
- ♦ *Changing Your Settings in Mobile Manager*
- ♦ *Switching Organizations in Mobile Manager*
- ♦ *Logging Out from Mobile Manager*
- ♦ *Finding More Information in the About Section*



# Overview

Everbridge Mobile Manager gives you the ability to notify and communicate with your organization's contacts. It provides native mobile access to Everbridge Suite for Apple iOS and Android smart phones and tablets.

Using Mobile Manager, you can send priority and non-priority messages from home, while on the road, or on site. You can also send Polling, Conference, and Quota notifications. Whether you are at the incident site, it is after hours, or you are away from your desk, you can quickly send a notification from your mobile device.

Mobile Manager is synced with your web Manager Portal account. You can access resources from the Manager Portal, including:

- ◇ Message Templates
- ◇ Notification Templates
- ◇ Groups, rules, and individual contacts
- ◇ Contact locations for map selection

Using pre-configured Notification Templates, you can launch a complete notification in as few as two taps after logging in. However, you are not limited to pre-configured resources. You can build an entire notification in Mobile Manager, including recording your voice message on the device and attaching a photo. You can select groups, rules, and individual members to receive the notification. You can select contacts within a radius of a location. You can use shapes from the My Shapes library. In addition, you can track the progress of active notifications as they are happening. At a glance, you can see how many recipients are confirming and how many have not been reached. You can also recall historical reports for notifications that have completed their duration.

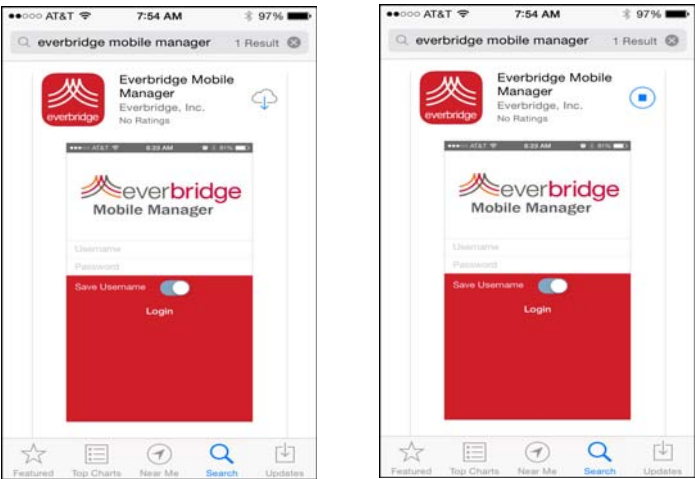
The Mobile Manager application is developed for your native device type. The examples in this chapter show using Mobile Manager on an iPhone. Your screens might not look exactly like the examples, but the features are the same.

**NOTE:** For other devices, authorized users can launch and report on notifications from any mobile browser by visiting <http://manager.everbridge.net>. You will be redirected to the mobile version, which is a limited version of the Mobile Manager accessible from any mobile device that has an Internet browser.



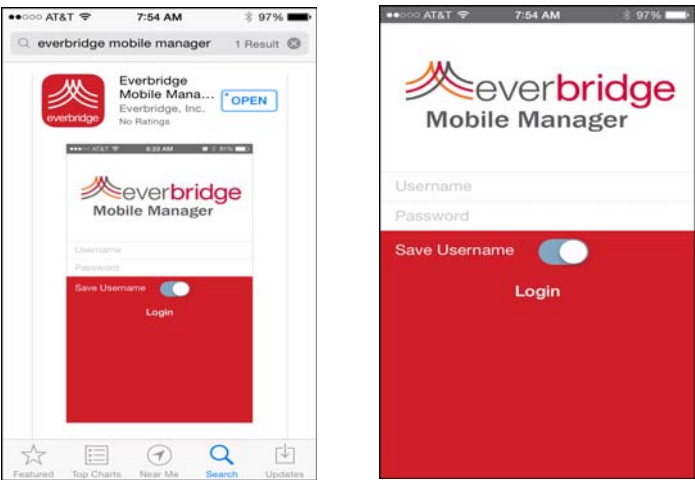
# Getting Started With Mobile Manager

You will find the Everbridge Mobile Manager application at the App Store for your phone or tablet. Download and install it as you would for any other app for your device. For example, locate the app and tap Install.



## To login to Mobile Manager

- 1 Find the Mobile Manager app on your device and open it.



The Login screen is displayed. Your login credentials for Mobile Manager are the same as those for the web Manager Portal.

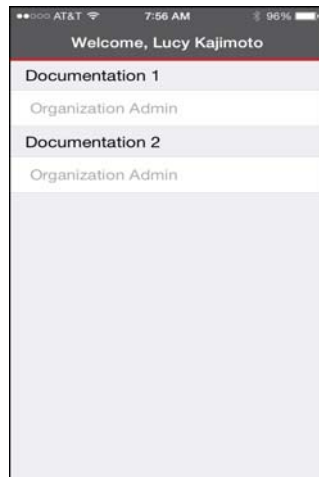
- 2 Optionally, in the Save Member ID field, tap OFF to ON.  
When ON, you will only need to enter your password to login in the future. The app remembers your username.



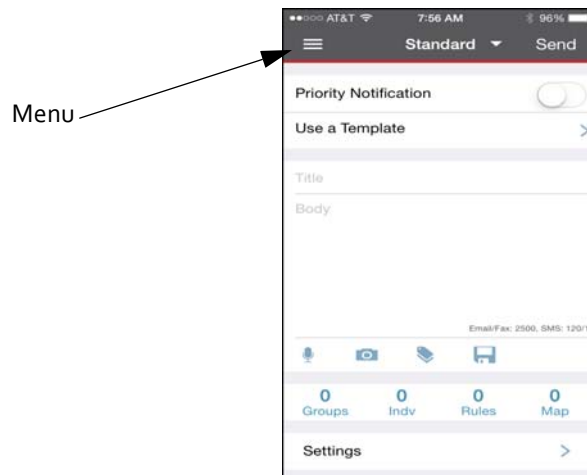
- 3 Type your username and password.

**NOTE:** Your password expires in 90 days. If you change your password during the 90-day period, the counter resets to zero (0) and starts a new 90-day cycle. If your password expires, a link is provided and you must change the password from the Manager Portal.

- 4 Tap Login.  
If you have permission to use multiple organizations, the Select Organization screen is displayed.
- 5 Select the desired organization.



Your Landing Page is displayed. In the following example, the New Notification screen is displayed. (To change your Landing Page, see the procedure *To customize your Landing Page in Mobile Manager* on page 297.)



- 6 Do one of the following:
  - Proceed to the procedure *Initiating a New Notification from Mobile Manager* on page 272.





- Tap the Menu icon in the upper left-hand corner of the screen to perform other Mobile Manager activities. Then go to the corresponding procedure in this chapter for details.



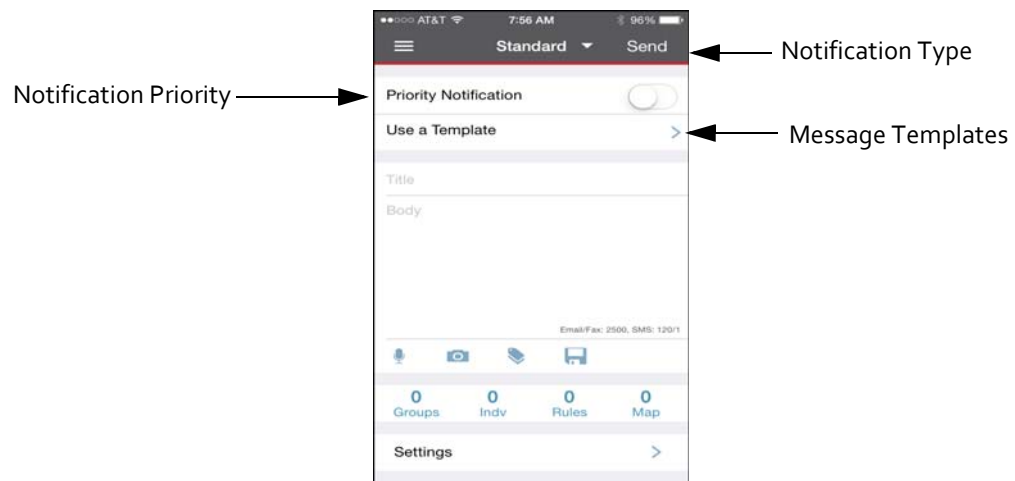
# Initiating a New Notification from Mobile Manager

From the Menu, you can perform all the tasks of sending and monitoring notifications. This section assumes you are familiar with sending notifications from the web Manager Portal. Example device screens are shown here.

## To initiate a new notification from Mobile Manager

- 1 From the Menu, tap New Notification.

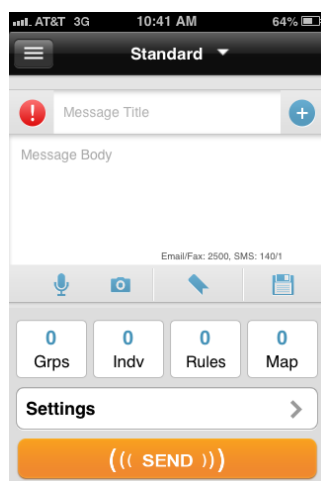
The New Notification screen is similar to the one in the web Manager Portal. The title of the screen is "Standard," indicating the message type.



By default, the message will be sent as non-priority (blue icon).

- 2 Optionally, tap the Notification Priority icon (blue icon) to change it to priority (red icon).

The icon becomes a red icon. If you change your mind, tap the Notification Priority icon again.



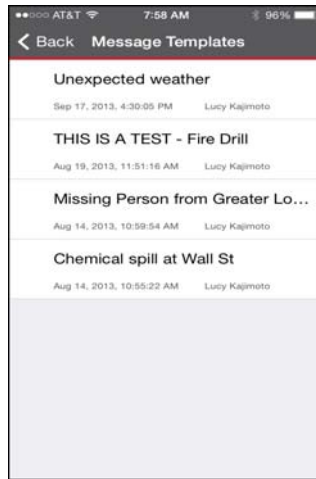
- 3 Tap the Down arrow next to the "Standard" notification type to select a different message type. Tap the desired message type.  
For now, these steps assume you are sending a Standard message. (Later, step 14 provides the additional information you need for the other message types.)



The title of the notification changes to the notification type you chose.



- 4 To use a message template (otherwise, skip to step 5):
  - a Tap Use a Template.



- b Tap the desired message template that you want to use. The New Notification screen is displayed with the message filled in from the template. Then, skip to step 6.
  - c If there is no pre-configured message template in the list, tap Back in the upper left-hand corner of the screen to return to the New Notification screen. Proceed to step 5, next.
- 5 If you did not use a Message Template, in the Message Title, type a title.
- 6 In the Message Body, review and/or type your message.  
While you are typing, the character counters show you how many characters are still available for the message.
- 7 Optionally, to record a voice message:
  - a Tap the Microphone icon.

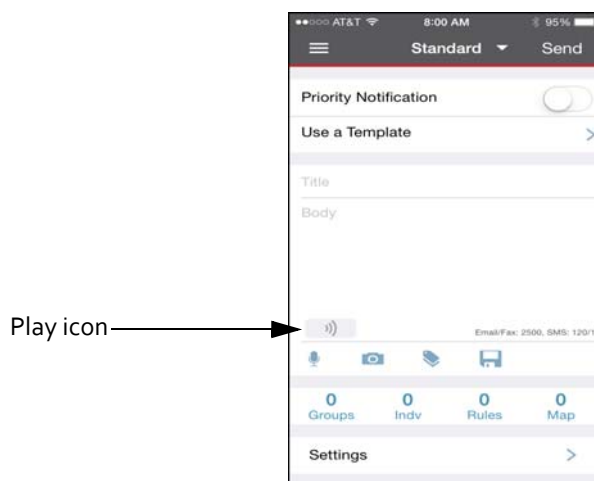


- b If needed, tap OK to access the microphone.
  - c Tap Record.

- d Speak into the microphone of the device to record your message.
- e Tap Stop when you are done.



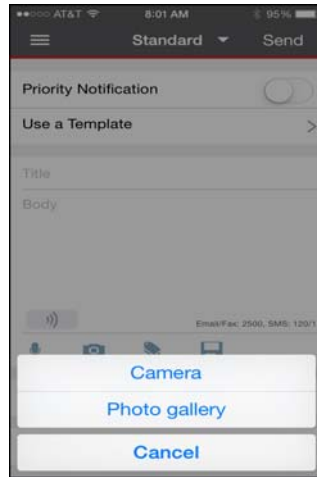
- f To listen to the voice recording, tap Play.
- g If you are not satisfied with the recording, repeat steps a-f.
- h If you do not want to use the recorded message, tap Clear (lower right-hand corner of the screen) to remove the voice recording.
- i When you are done with your recorded message, tap Back in the upper left-hand corner of the screen.



- j Listen to your recorded message from the New Notification screen by tapping the Play icon.



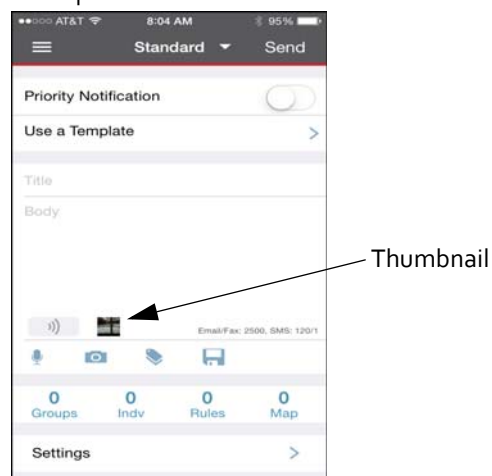
- 8 Optionally, to attach a photo to the message:
  - a Tap the Camera icon.



- b If available, tap the type of photo you want: take a live photo or select a photo from the gallery. You can send one attachment at a time. The size of the attachment should not exceed 1 MB.

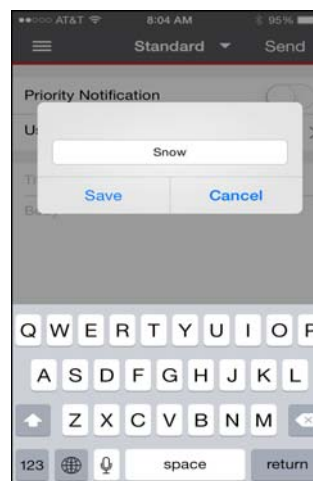
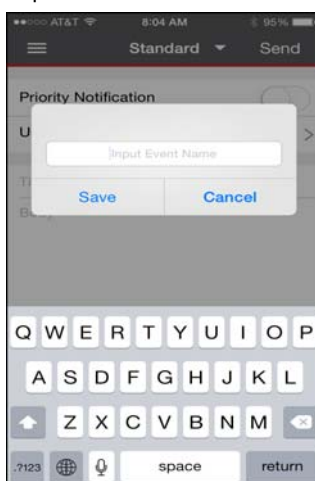


- c A thumbnail of the photo is provided on the New Notification.



- 9 Optionally, to create an event:

- a Tap the Event icon.

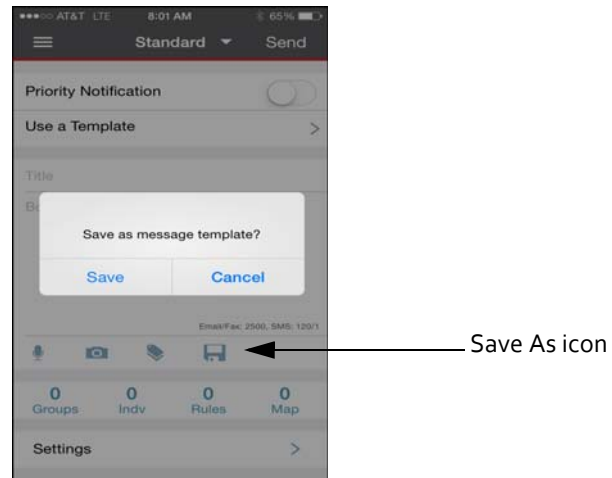


- b Type a name for the event and tap Save.



- 10 Optionally, to save the message you just created as a Message Template to use again in the future:

- a Tap the Save As icon.

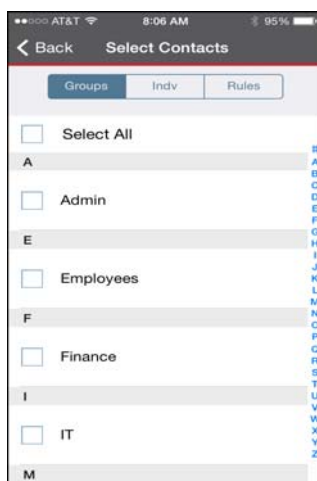


- b Tap Save. The message is added as a Message Template.

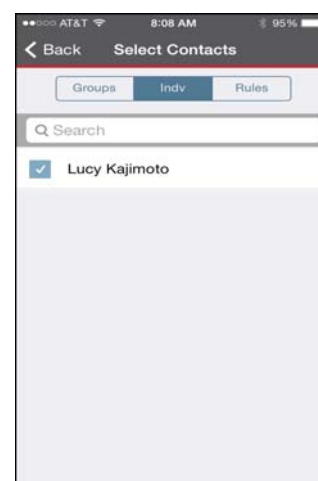
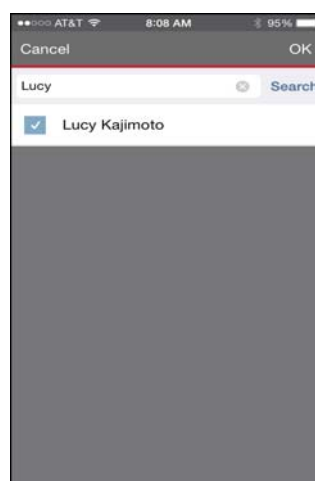
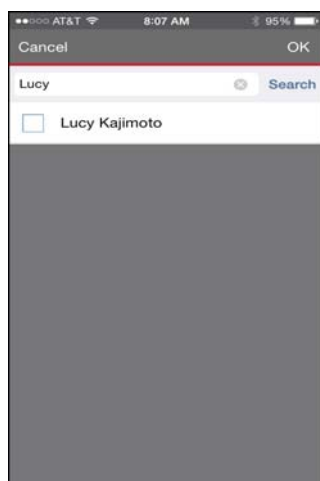


# 11 Select the contacts by Group, Individuals, Rules:

- a Groups—Tap Groups. The groups are listed in alphabetical order. Tap the check box next to the desired group name or names. Or, tap Select All at the top of the list. Tap Back in the upper left-hand corner to return to the New Notification screen, or tap the desired contact button at the top of the screen.



- b Individuals—Tap Individuals. To locate an individual, type a first or last name in the Search bar, then tap the Search icon. Tap to select the desired individual from the list, then tap OK. Repeat searching until you have selected all the individuals you want to notify. Tap Back in the upper left-hand corner to return to the New Notification screen, or tap the desired contact button at the top of the screen.

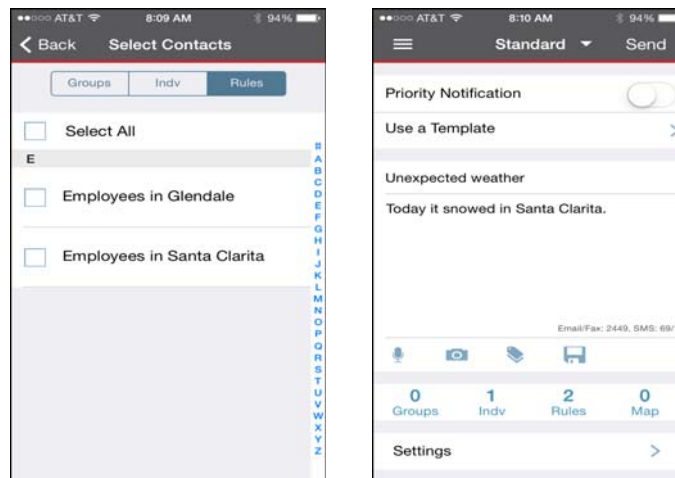




To see all the members in your organization, tap Search without first typing a character in the Search bar. However, if you have a large contact database, it could take quite some time to return the results, especially if you have a low bandwidth at the time. It is better to narrow the results (search for individuals) as much as possible before tapping Search.

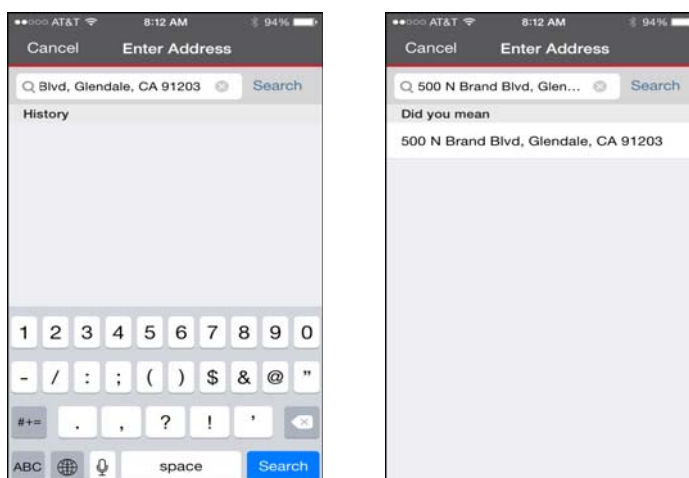
**NOTE:** To ensure you send your notification as quickly as possible, Everbridge does not display all contacts by default. The list of contacts could be very large and thus take quite some time to populate the list, which would interfere with your ability to send your notification in a timely manner.

- c Rules—Tap Rules. The rules are listed in alphabetical order. Tap the check box next to the desired rule or rules. Or, tap Select All at the top of the list. Tap Back in the upper left-hand corner to return to the New Notification screen, or tap the desired contact button at the top of the screen.

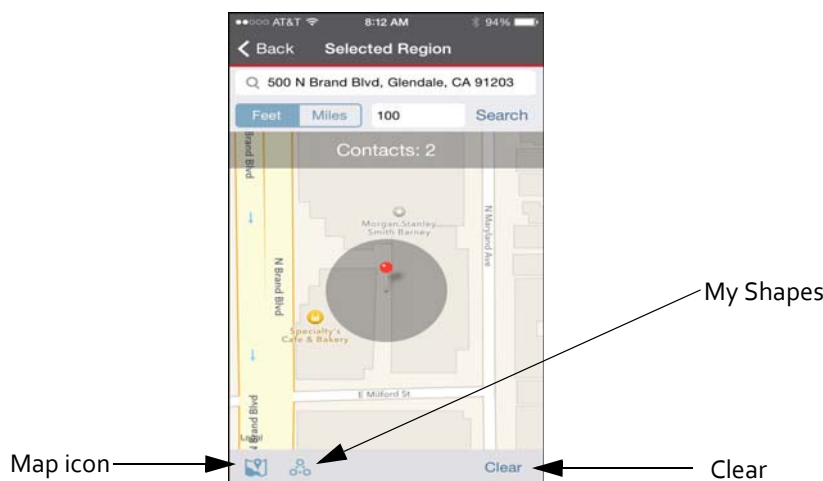


- d The count of groups, individuals, and rules you have selected is shown on the New Notification screen.
- 12 To select contacts from the map:
- a Tap Map. By default, the map display is disabled so you do not have to wait for your device to render it. (It is not necessary to actually render the map to select contacts based on their location.)

- b Tap the Search bar to locate an address on the map. (Addresses you have previously entered appear on the History list. If the desired address is on the list, tap it.) Locate a new address by typing the address in the Search bar, then tapping the Search icon. The search returns standardized addresses that match your string.



- c Tap the address you want to use. The pin on the map shows the location of the address.



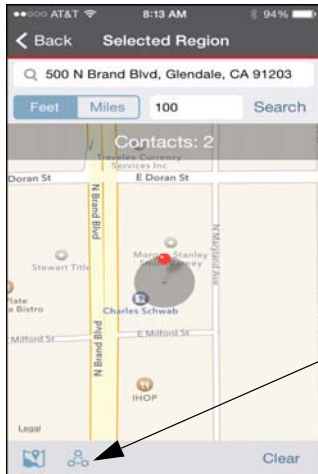
- d Enter a radius to draw a selection circle around the address. Select a scale for the radius: Feet or Miles. The display shows you how many contacts have been selected within the circle.

**NOTE:** You will not see your contacts as dots on the map like you do in the web Manager Portal.

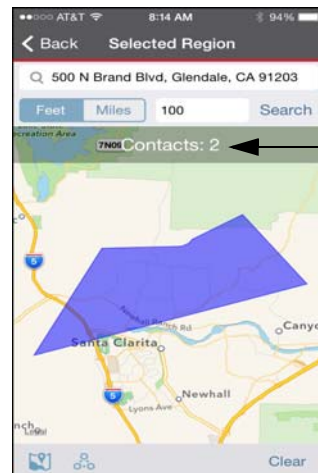
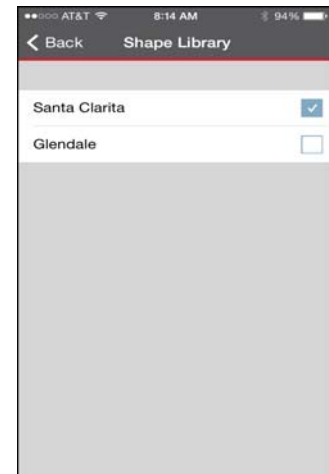
- e If you do not want to use the selected address, tap Clear in the upper right-hand corner of the screen.
- f Turn the map display on and off by tapping the Map icon in the lower left-hand corner of the screen.



- g Optionally, to use a shape from your My Shapes library, tap the My Shapes icon in the lower right-hand corner of the screen. Tap one or more shapes to select them. Tap Back. The shape is displayed on the map and the counter displays how many contacts are selected within the shape.



My Shapes icon

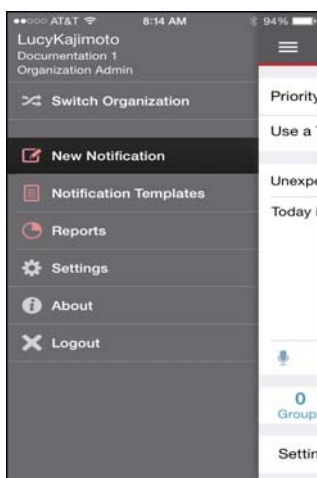


Number of selected contacts in the shape

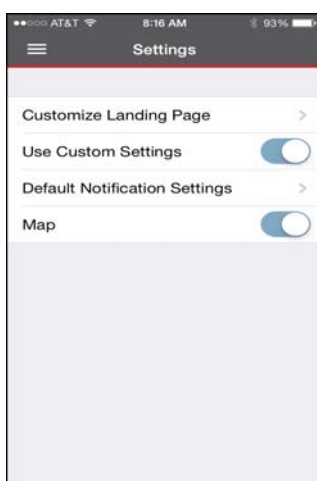
- h You see the number of the selected contacts from the shape on the map. Tap Back in the upper left-hand corner of the screen.



- 13 To review and/or change the Settings:
  - a Tap the Menu icon in the upper left-hand corner.



- b Tap Settings.



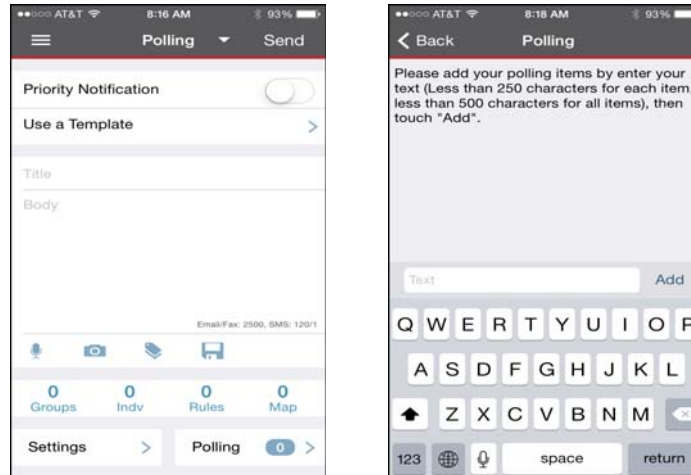
- c Tap a setting to drill to the details. (For details, see *Changing Your Settings in Mobile Manager* on page 297.)
    - d When done, return to the next step.



- 14 As needed, perform these additional steps for Polling, Quota, and Conference Bridges. Then, proceed to the procedure *Sending the Notification from Mobile Manager* on page 287.

**Polling**—In a polling message, you add options to solicit responses to the message. The contact chooses one of the options, and you will see them in the notification results. For example, if the Headquarters is closed for the day, you can ask where employees will work: Option 1: Home, or Option 2: Satellite Office.

- a Tap Polling next to Settings.

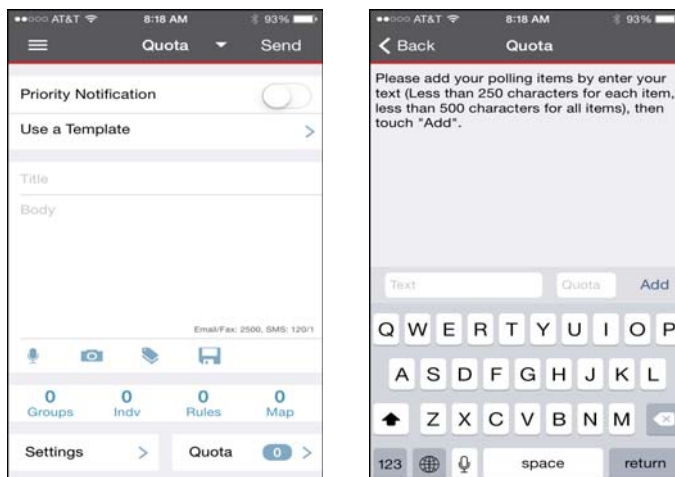


- b Add each item (less than 250 characters per item and less than 500 characters for all items) and tap Add.
- c Tap Back.



**Quota**—In a Quota message, you can add options for contacts to respond to a list of choices and then you send a Follow-Up with the results. For example, if you need five volunteers to work the graveyard shift on Saturday and Sunday, you can type Need volunteers to work graveyard on Saturday with #needed as 5 and Need volunteers to work graveyard on Sunday with #needed as 5. Broadcast Results show which contacts are willing to work. You can then send a Follow-Up letting everyone know who is working (perhaps the first five contacts to volunteer).

- a Tap Quota next to Settings.

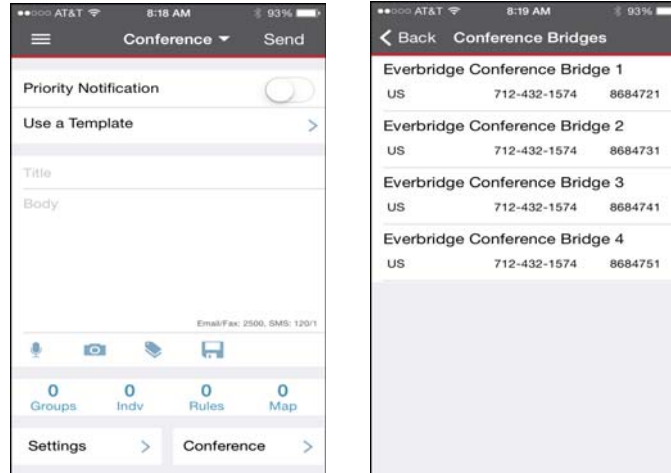


- b In the Quota field, add the quota number for this polling item.
- c In the Text field, type the quota item (less than 250 characters per item and less than 500 characters for all items).
- d Tap Add.
- e Repeat steps b-d until you have added all your quota items.
- f Tap Back.



**Conference**—In a conference message, the contact will be able to connect to a conference bridge.

- a Tap Conference next to Settings.



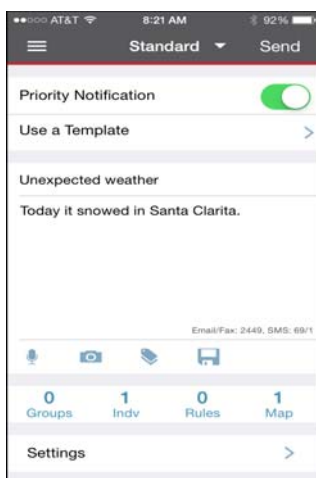
- b Tap the desired Conference Bridge.
- c Tap Back.



# Sending the Notification from Mobile Manager

## To send the notification from Mobile Manager

- 1 Tap Send.



The Notification Summary screen is displayed, where you can watch the results. When the notification is first starting up, the values are all zero since no contacts have yet been notified.

- a Confirmation Status—For each of the confirmation states (Confirmed, Not Confirmed, Confirmed Late, and Unreachable), a list of the contact names appears.
- b Confirmation Status by Path—The Confirmation Status by Path chart shows the number of contacts that confirmed by delivery method.
- c Tap Back to return to the Report screen.



- 2 Proceed to *Viewing Reports in Mobile Manager* on page 290 for details.

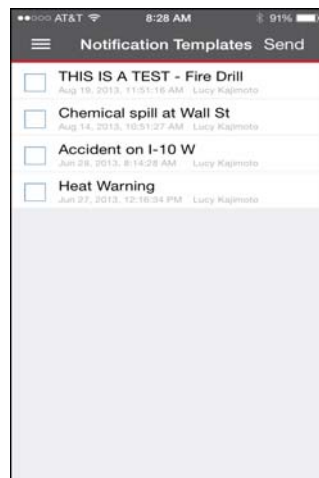


# Sending Notification Templates from Mobile Manager

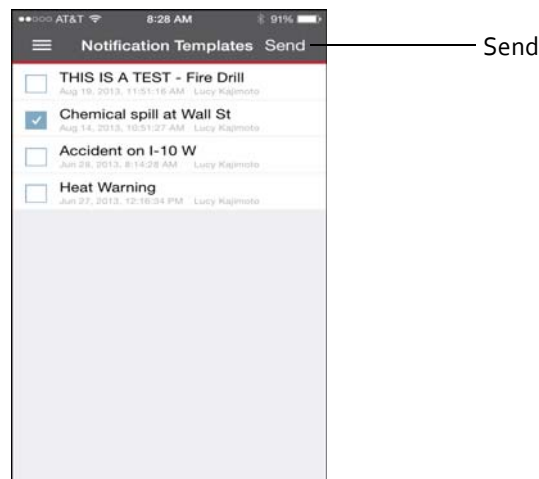
From Everbridge Mobile Manager, you can launch notifications from templates that you have previously created. These are the same templates available on the Notifications tab on the web Manager Portal.

## To use Notification Templates from Mobile Manager

- 1 From the Menu, tap Notification Templates.  
The list of existing Notification Templates is displayed.

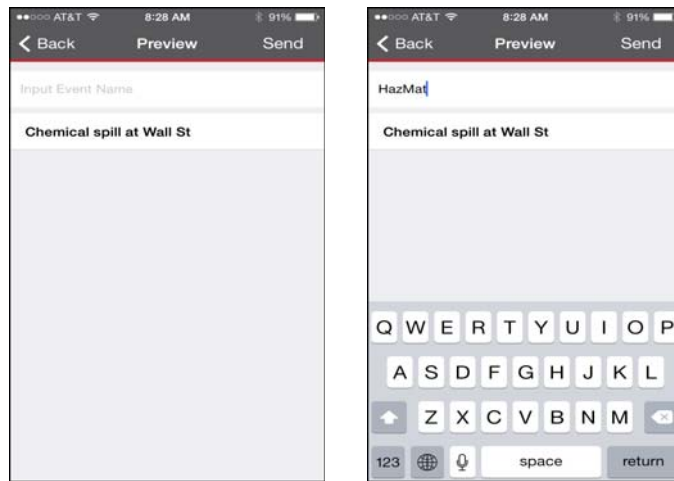


- 2 Tap one or more check boxes of the notification templates you want to launch. Then, tap Send.



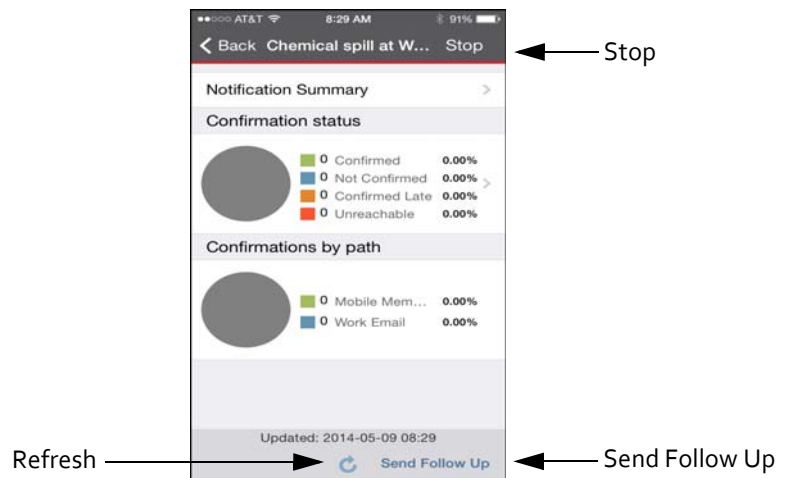


- 3 Optionally, type the Event name and tap Send.



- 4 Tap Send.

Once you launch the notification, you see the notification results. When the notification is first starting up, the values are all zero since no contacts have yet been notified.



- 5 Optionally, tap Stop to stop the notification.



## Viewing Reports in Mobile Manager

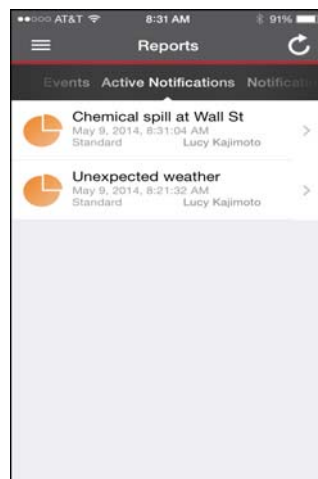
Notification results are also on the Reports screen. You can view Active Notifications, Events, and Notification History. While the notification is active, you will see it in the Active Notifications list. When it ends, it will be in the Notification History list. If the list of reports on any of these screens is longer than will fit, scroll to the bottom of the list and tap More.

If you are viewing an active notification, you can:

- ◇ Tap Stop to stop the notification.
- ◇ The screen automatically refreshes and displays the updated statistics. (You can also manually refresh the screen by tapping Refresh, located at the bottom left-hand corner of the screen.)

### To view reports in Mobile Manager

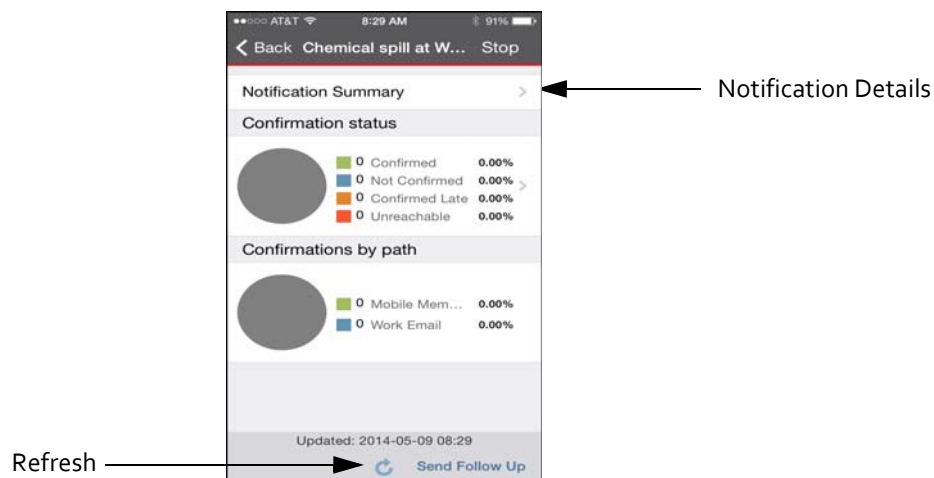
- 1 From the Menu, tap Reports.



- 2 Tap a report to open it.



For each notification, you can view the notification summary.

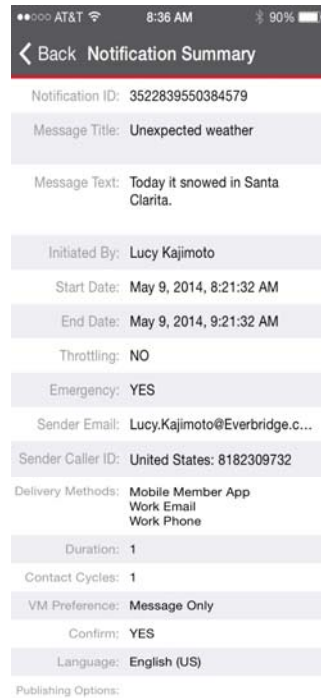


- 3 Tap Notification Summary to review the message and settings for the notification. (Note the ID if you need to contact Everbridge for support.)
- 4 Tap Back to return to the Report screen.  
The Confirmation Status chart shows the number and percentage of the selected contacts in each confirmation state.
- 5 Tap Refresh to view updated confirmation statuses.

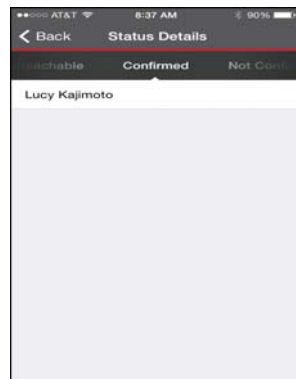




- 6 Tap Notification Summary to see the notification details. Scroll to review all the details.



- 7 Tap Back.
- 8 Tap the Confirmation Status to see the status details.
- 9 Slide to the desired heading.



← Headings

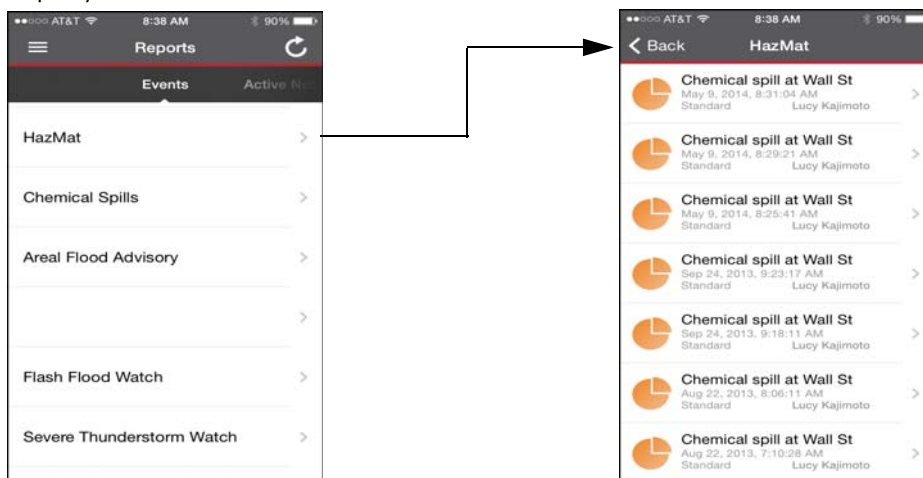
The status details displays the names of contacts who:

- Not Confirmed—have not confirmed receiving the message.
- Confirmed Late—confirmed after the end of the notification duration.
- Confirmed—confirmed while the notification was active.
- Unreachable—could not be reached because they did not have a valid delivery method.

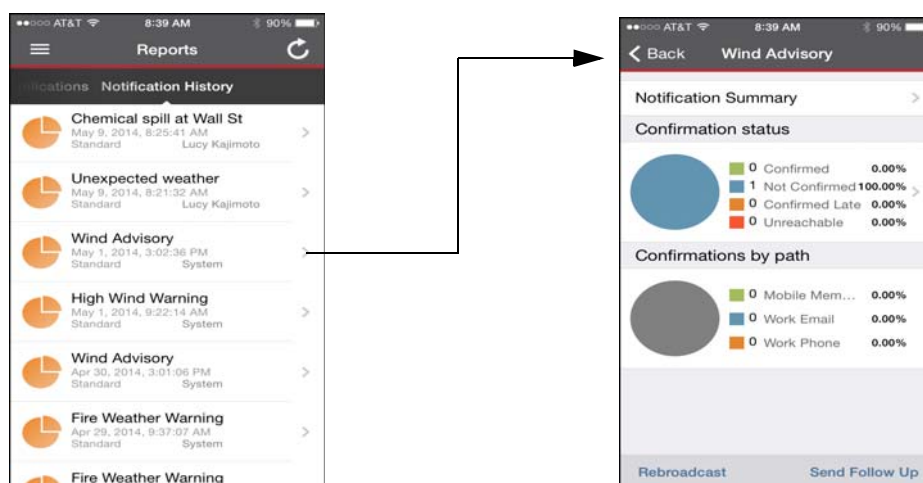
- 10 Tap Back to return to the Notification Summary screen.



- 11 Look at the Confirmation Status by Path. For those contacts who have confirmed, the Confirmation Status by Path shows which delivery method the contacts used to confirm.
- 12 Tap Report in the upper left-hand corner to return to the Report screen.
- 13 Optionally, from the Reports screen, slide to Events.  
If you select Events on the Reports screen, you see the list of events. Tap an event to drill down. In the individual event, you see a list of the notifications that are part of the event. Tap any notification to drill down to the details of that notification.



- 14 Optionally, from the Reports screen, slide to Notification History.  
If the notification is no longer active and some of the contacts have not confirmed, you can send the notification again by tapping Rebroadcast, located at the bottom left-hand corner of the screen. This sends the original message again to all of the unconfirmed contacts.

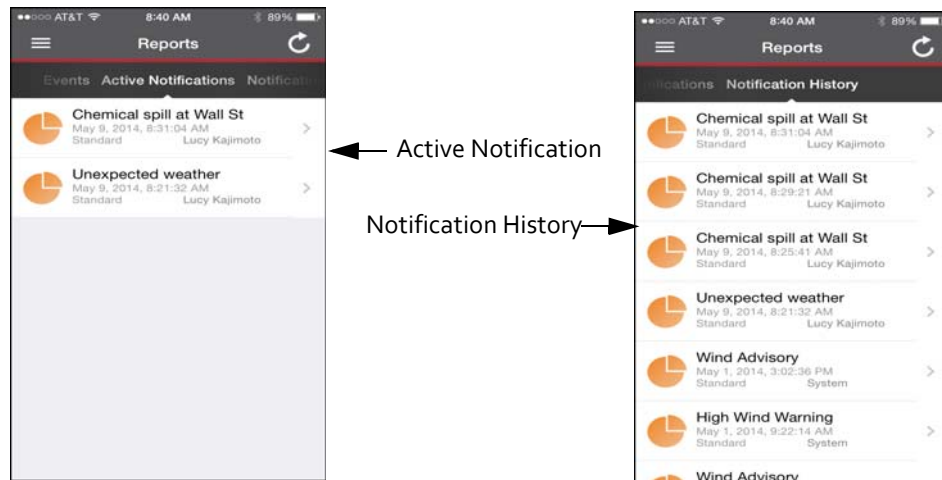


You can also send a Follow Up message about a notification. In a Follow Up notification, you can change the configuration of the notification, unlike a rebroadcast, which simply resends the original notification. (See the procedure *To send a Follow Up notification*.)

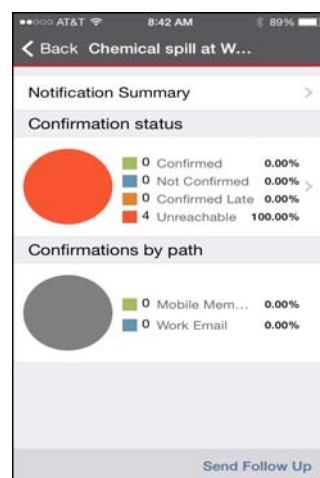


## To send a Follow Up notification

- 1 From the Reports screen, access the report from either: Active Notifications or Notification History. (It is the identical report.)



- 2 Tap Send Follow Up.



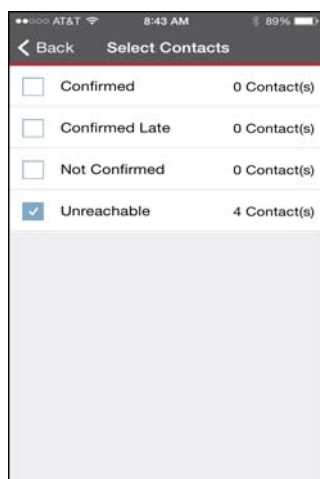




- 3 To select the contacts to which to send the follow up message, tap Follow up on. (Or, if you are sending a Follow-Up to a polling notification, you can follow up based on the polling responses.)

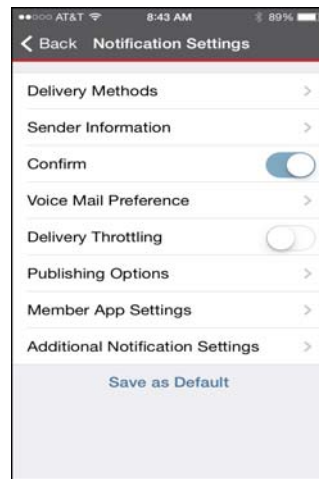


- 4 Select one or more types of confirmation states to send the Follow Up notification by tapping the desired check boxes. Tap Back in the upper left-hand corner of the screen. You see the total number of contacts selected to receive the follow up notification.





- 5 Make any changes to the message or notification settings, as needed.



- 6 Tap Send.



---

# Changing Your Settings in Mobile Manager

You can change the following from your device:

- ♦ Landing Page
- ♦ Default Notification Settings
- ♦ Map Display

Tap the ON/OFF switch to control settings that do not require configuration.

Tap Additional Notification Settings to configure values that are not on the screen. Tap the setting you want to change. Make the change and tap Back. When you are done with the Additional Notification Settings, tap Back again.

If you are accessing your notification settings from the New Notification screen, you can tap Save as Default to save these settings. Or, from the Menu > Settings, under Default Notification Settings, if you want to save the current settings as the default settings for future notifications, tap Save. In either case, these settings are saved as your personal Mobile Manager settings and does not affect the rest of the organization.

## Landing Page in Mobile Manager

It is a best practice of Emergency Notifications to prepare the message in advance of an incident. This gives you a great opportunity to plan and think through the wording of your message to make it effective. You can review your list of recipients to make sure you have selected everyone who needs to receive the notification.

If you create Notification Templates and select Notification Templates as your landing page, when you login, you are only two steps away from sending a notification. You would:

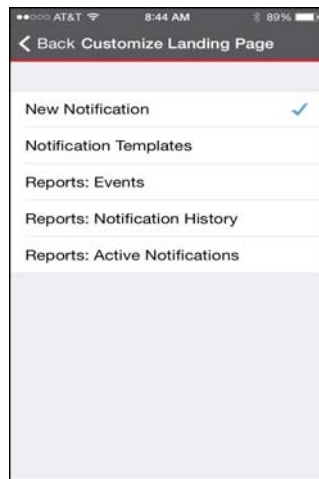
- 1 Select the respective template from the list.
- 2 Tap Send.

### To customize your Landing Page in Mobile Manager

- 1 From the Menu, tap Settings.
- 2 Tap Customize Landing Page.



- 3 Tap to choose which page will appear when you first login. Choose from the following:



- 4 Tap Back.

## Default Notification Settings in Mobile Manager

Your organization has configured default notification settings that will be applied when you configure a new notification. These settings apply to both the web Manager Portal and the Mobile Manager.

When you are using Mobile Manager, you can define your own defaults to use for notifications. These defaults are applied instead of the organization defaults. They only apply to Mobile Manager. (If you use the web Manager Portal, you will use the organization defaults.) The Mobile Manager defaults only apply to your account; they do not apply to any other users. They also only apply to the specific app on a particular device. For example, if you have the app on your iPhone and iPad, the settings would not automatically transfer from your iPhone to your iPad or vice versa.

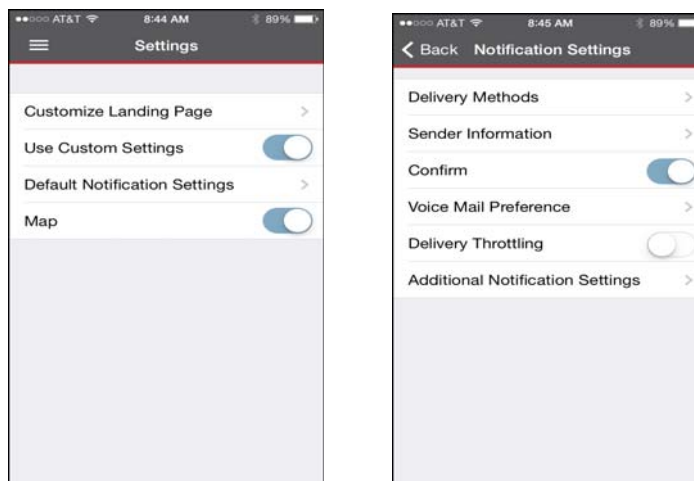
When ON, you are using your own Mobile Manager settings and not the organization defaults. When Custom Settings is OFF, you will use the organization defaults. If OFF, the Default Broadcast Settings is no longer available since you are not using your Mobile Manager custom settings.

### To use Custom Settings in Mobile Manager

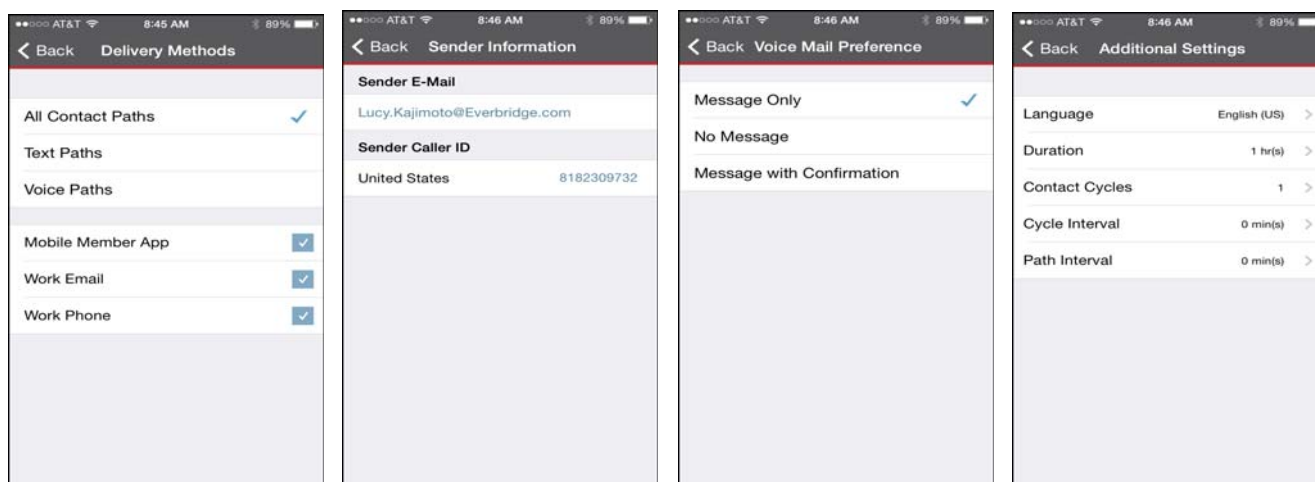
- 1 From the Menu, tap Settings.
- 2 Tap the ON/OFF switch for Use Custom Settings to ON.



- 3 Tap Default Notification Settings to configure your Mobile Manager defaults.



- 4 Select and configure any of the notification settings.



- 5 Tap Back when you are done.
- 6 Tap Back again to return to the Settings page.  
When you are sending a new notification, you can save the current settings as the default settings for future notifications by tapping Save as Default. This saves the settings as your personal Mobile Manager settings; it does not affect the rest of the organization.



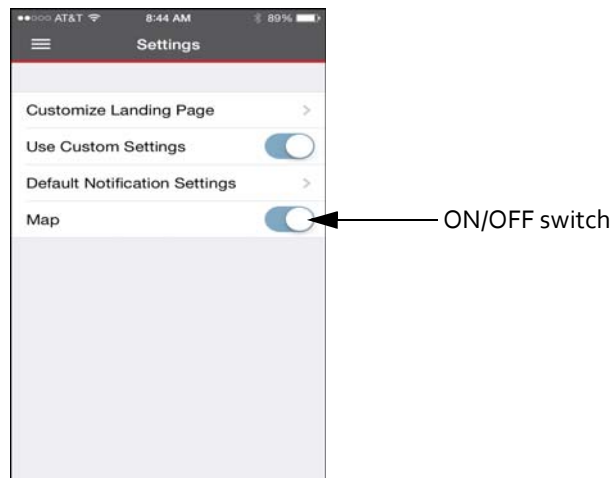
## Map Display in Mobile Manager

When you are selecting contacts for a notification based on their location, it is not necessary to actually render the map. By default the map display is disabled so you do not have to wait for your device to render it.

As you are selecting contacts, you can turn the map display on and off by tapping the Map Display icon, located at the bottom left-hand corner of the screen.

### To show the map by default in Mobile Manager

- 1 From the Menu, tap Settings.
- 2 Tap the ON/OFF switch for Map to ON.  
This way, when you select contacts, the map is displayed by default.





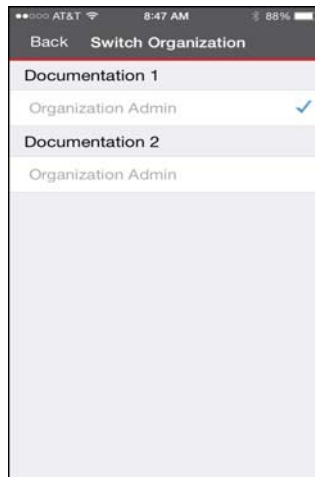
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# Switching Organizations in Mobile Manager

If you are registered in more than one organization in your account, you can switch to the organization you want to manage. (If there is only one organization in your account, you will not need to do this.)

## To switch Organizations in Mobile Manager

- 1 From the Menu, tap Switch Organization.  
The organization you are currently managing is indicated by a check mark.



- 2 Tap the desired organization.
- 3 Tap Back in the upper left-hand corner.



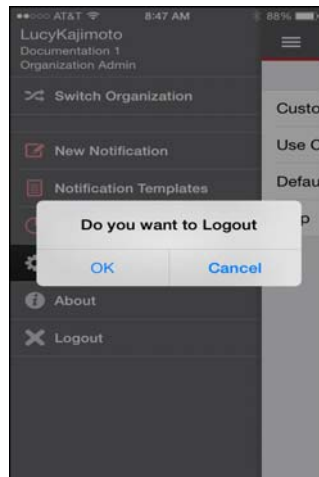
---

# Logging Out from Mobile Manager

When you are done with your session, log out. If you do not log out, you are automatically logged out after 30 minutes of inactivity.

## To log out from Mobile Manager

- 1 From the Menu, tap Logout.
- 2 Tap OK to confirm that you want to logout.



## To provide a review of the Mobile Manager App

- 1 From the Menu, select About > Rate us.



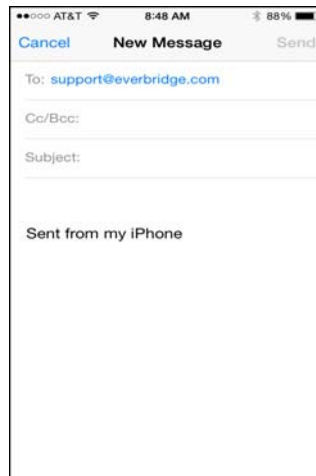
- 2 Tap Write a Review.
- 3 Provide your comments.





## To contact Everbridge Support via Mobile Manager

- 1 From the Menu, select About > Customer Support.  
A blank email is displayed.



- 2 Type a subject and the body of your email.
- 3 Tap Send.

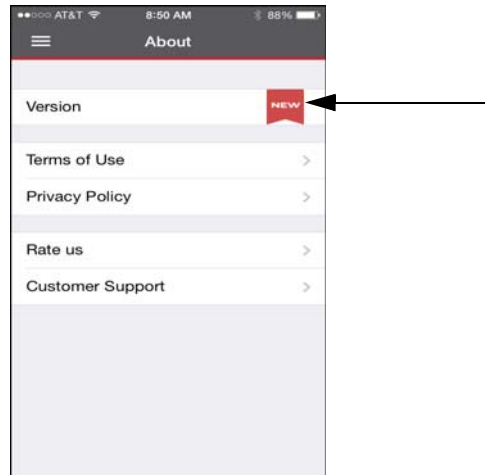


# Finding More Information in the About Section

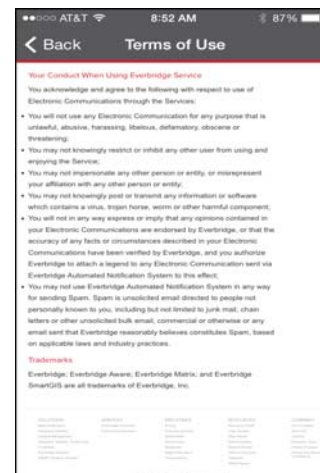
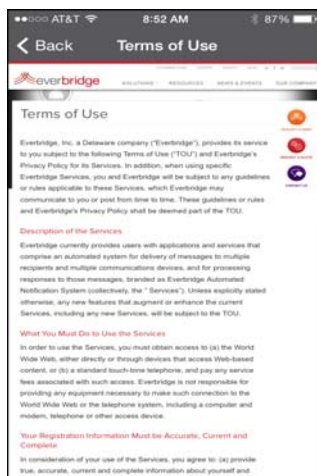
Also in the About section, you can find the following:

- ◇ Version
- ◇ Terms of Use
- ◇ Privacy Policy

## Version

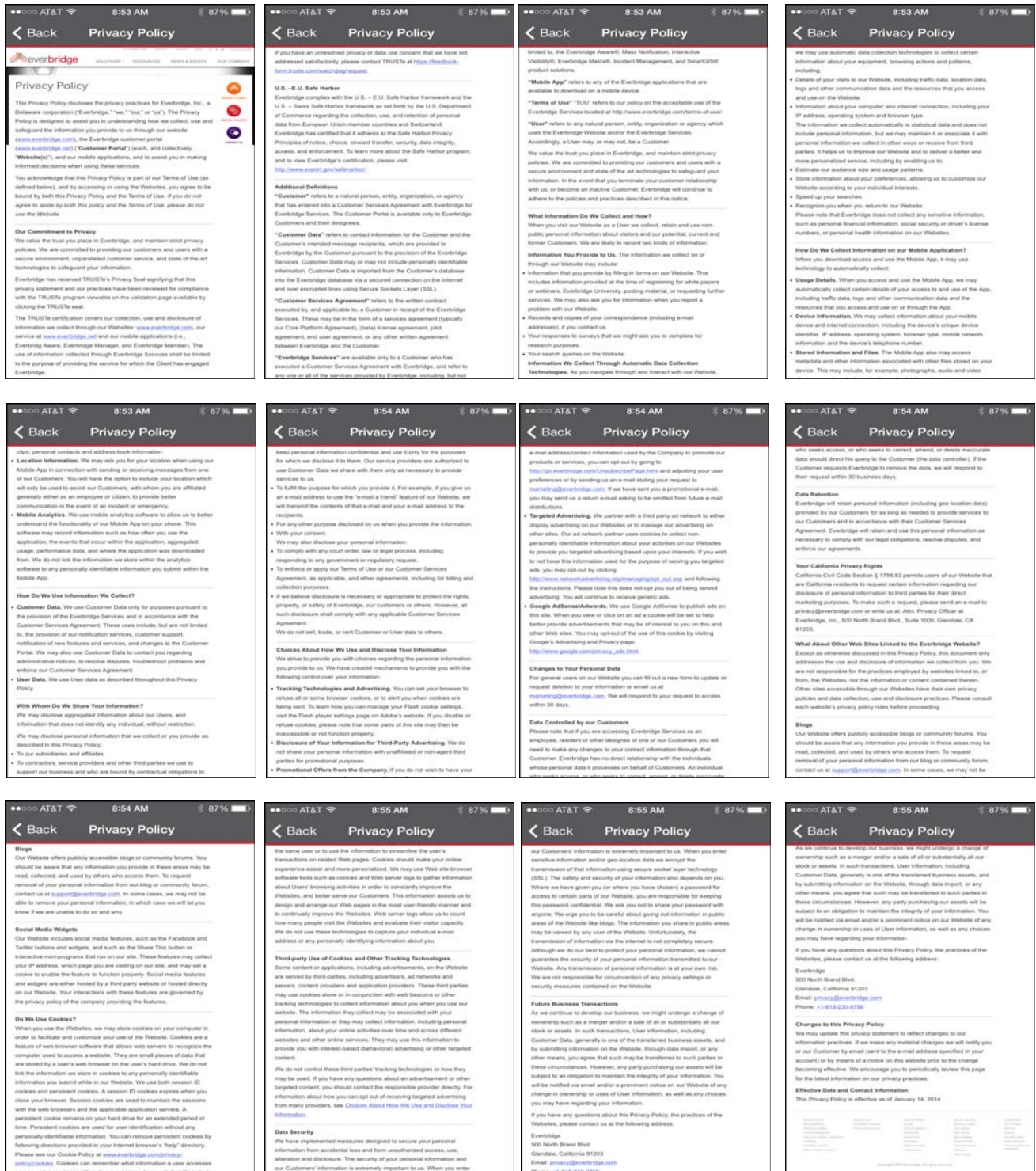


## Terms of Use





# Privacy Policy





# Mobile Site

This chapter provides information about using the Everbridge Mobile Site from any mobile device.

**The following topics are covered:**

- ♦ *Overview*
- ♦ *Initiating a New Notification from the Mobile Site*
- ♦ *Sending the Notification from the Mobile Site*
- ♦ *Sending Notification Templates from the Mobile Site*
- ♦ *Viewing Reports in the Mobile Site*
- ♦ *Switching Organizations in the Mobile Site*
- ♦ *Logging Out from the Mobile Site*



## Overview

The Everbridge Mobile Site allows users to initiate notifications from any mobile device that has a web browser. Authorized users can launch and report on notifications from any mobile browser by visiting **<http://manager.everbridge.net>**. Tablets users are directed to the full web Manager Portal. They can then choose to “Go to mobile site” at any time. Smart phone users are automatically redirected to the mobile site.

Conversely, users on the mobile site can tap “Go to full site” from the mobile site Sign In page to access the full web Manager Portal.

Since the mobile version of [manager.everbridge.net](http://manager.everbridge.net) can be used on a web browser, you can also access this site from your computer’s browser. You might want to use the mobile version of the site if you are looking for a simplified user interface with a focused feature set.

everbridge

English (United States) ▼

**SIGN IN**

Username

[Forgot my username](#)

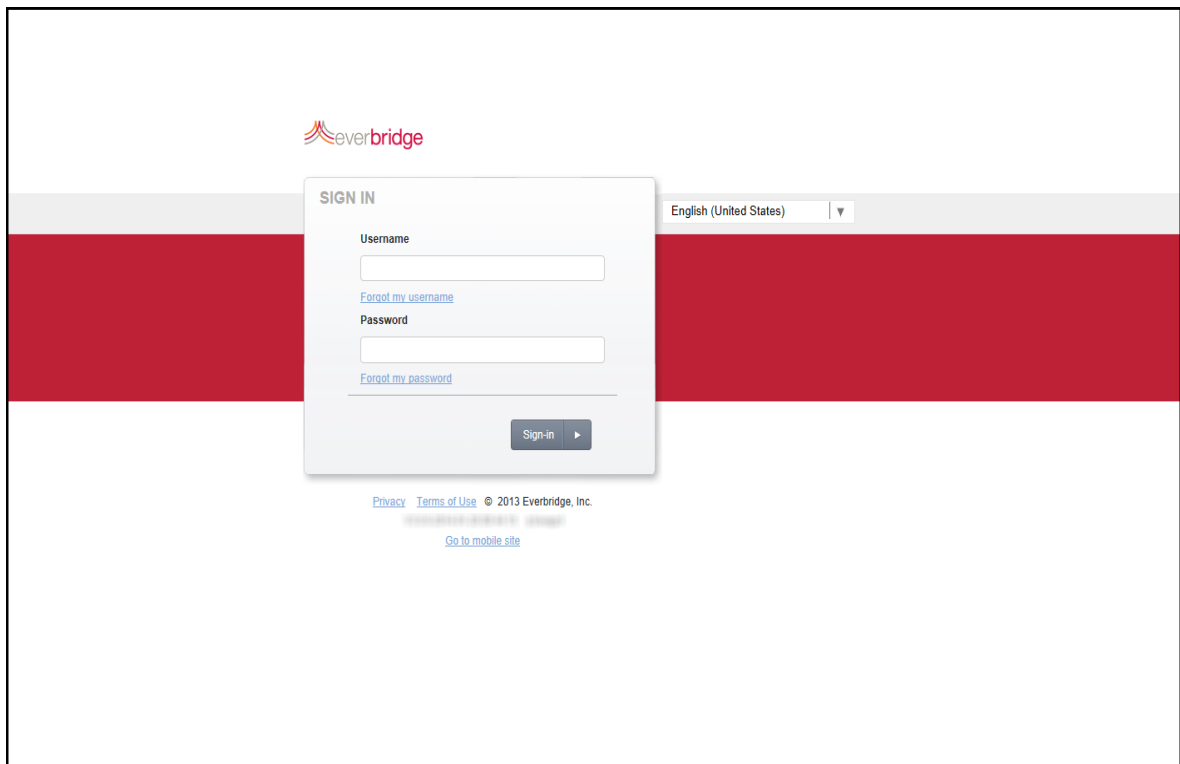
Password

[Forgot my password](#)

Sign-in ►

[Privacy](#) [Terms of Use](#) © 2013 Everbridge, Inc.  
[Go to mobile site](#)

## To login to the mobile site



- 1 Type **http://manager.everbridge.net** from your web browser.
- 2 Perform one of the following, a or b.
  - a From the web Manager Portal screen on your computer or tablet:
    - From the Sign In screen, tap the link at the bottom of the screen: Go to mobile site.



The mobile site's Sign in screen appears.

Username

Password

Sign in

[Privacy Terms of Use](#) © 2014 Everbridge, Inc.  
[Go to full site](#)

- b From a smart phone, the Everbridge Mobile Web tab is displayed.

manager.everbridge.net

everbridge

Username

Password

Sign in

[Privacy Terms of Use](#) © 2014 Everbridge, Inc.  
[Go to full site](#)

The Sign in screen is displayed. Your login credentials for the Mobile site are the same as those for the web Manager Portal.

**NOTE:** The examples in this chapter are from a smart phone. If you are using a tablet or computer, the screens are identical to those of a smart phone, but larger.





3 Type your username and password.

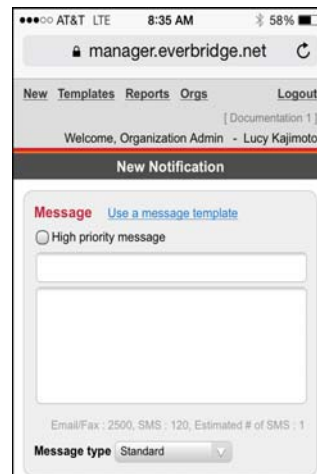
4 Tap Sign in.

If you have permission to use multiple organizations in your organization, the Select Organization screen is displayed.



5 Tap the desired organization.

6 The New Notification screen is displayed. It is your Landing Page.



7 Do one of the following:

- Proceed to the procedure *Initiating a New Notification from the Mobile Site* on page 312.
- Tap the desired link (Templates, Reports, or Orgs) in the upper left-hand corner of the screen to perform other Mobile site activities. Then go to the corresponding procedure in this chapter for details.



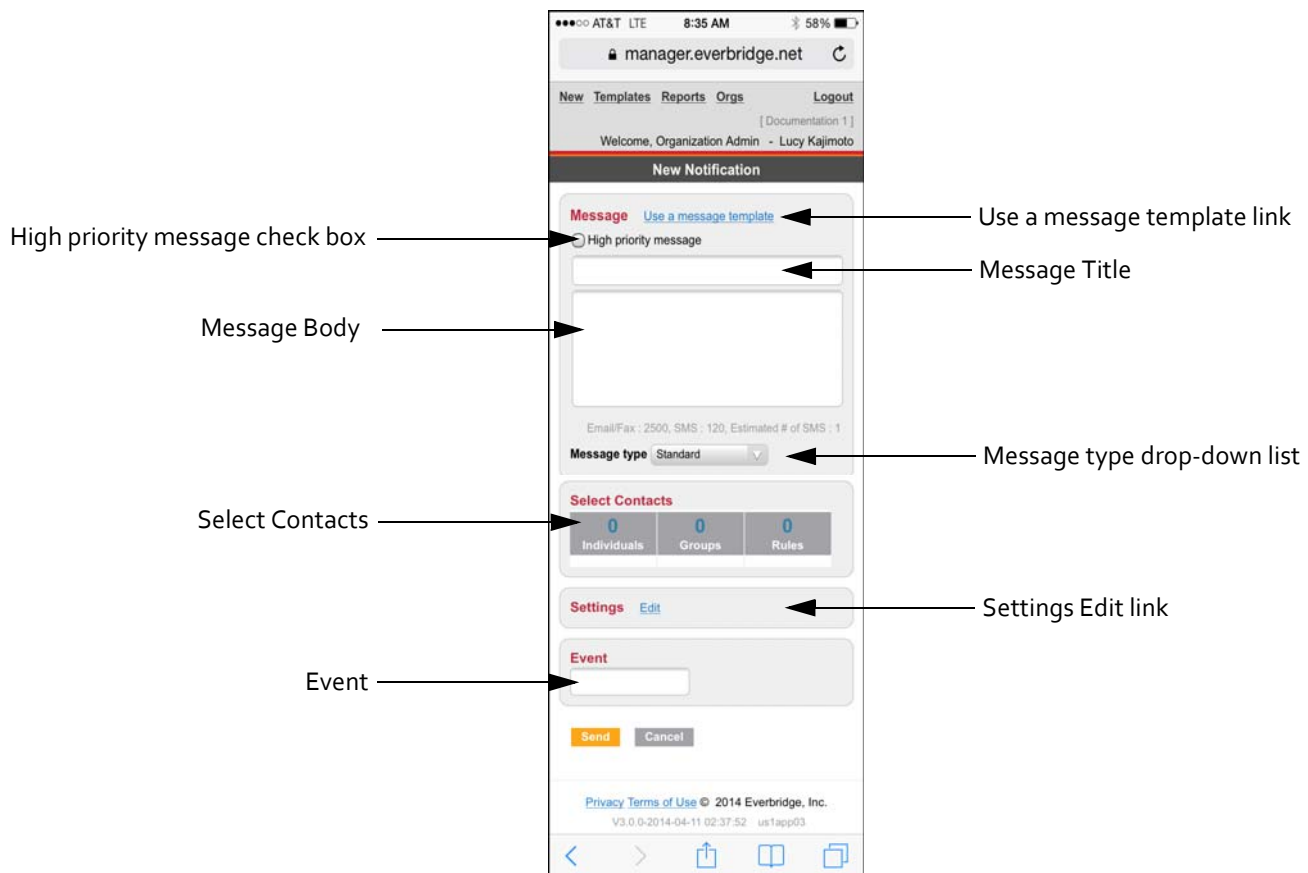
# Initiating a New Notification from the Mobile Site

You can send and monitor notifications from the mobile site. This section assumes you are familiar with sending notifications from the web Manager Portal.

## To initiate a new notification from the mobile site

- 1 Tap New.

The New Notification screen is similar to the one in the web Manager Portal.

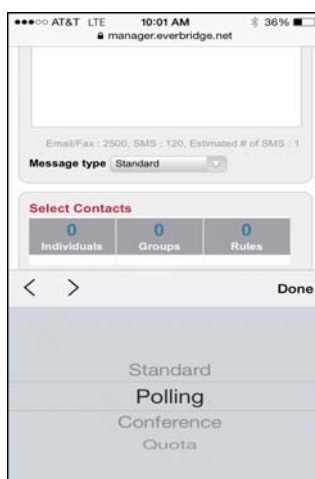


By default, the message will be sent as a Standard priority message.

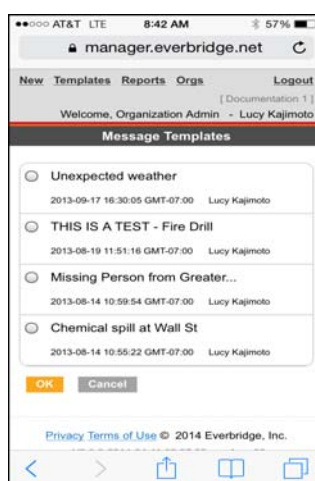
- 2 Optionally, select the check box: High priority message.  
If you change your mind, clear the check box.
- 3 From the Message Type spinner, select the desired message type.



For now, these steps assume you are sending a Standard message. (Later, step 10 provides the additional information you need for the other message types.)

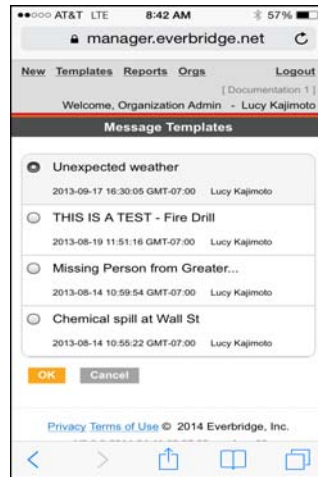


- 4 To use a message template, perform the following steps. (Otherwise, skip to step 5.)
  - a Select the link: Use a message template, located just above the High priority message check box.

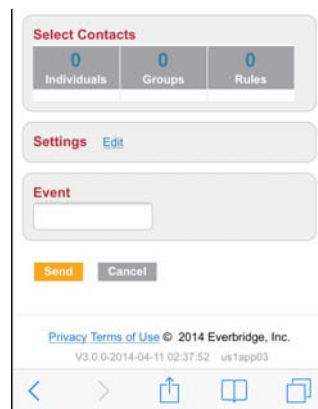




- b Select the radio button of the desired message template that you want to use, and tap OK.

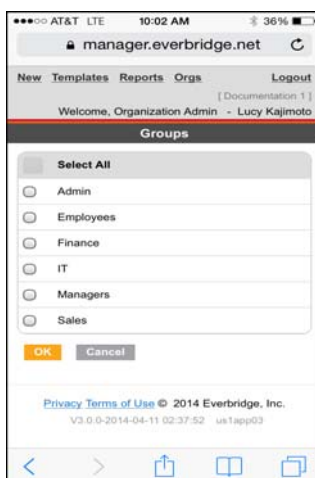


- c The New Notification screen is displayed with the message filled in from the template. Then, skip to step 6.
- d If there is no pre-configured message template in the list, tap Back to return to the New Notification screen. Proceed to step 5, next.
- 5 If you did not use a Message Template, in the Message Title, type a title.
- 6 In the Message Body, review and/or type your message.  
While you are typing, the character counters show you how many characters are still available for the message.
- 7 To create an event, from the Event field, type a name for the event.

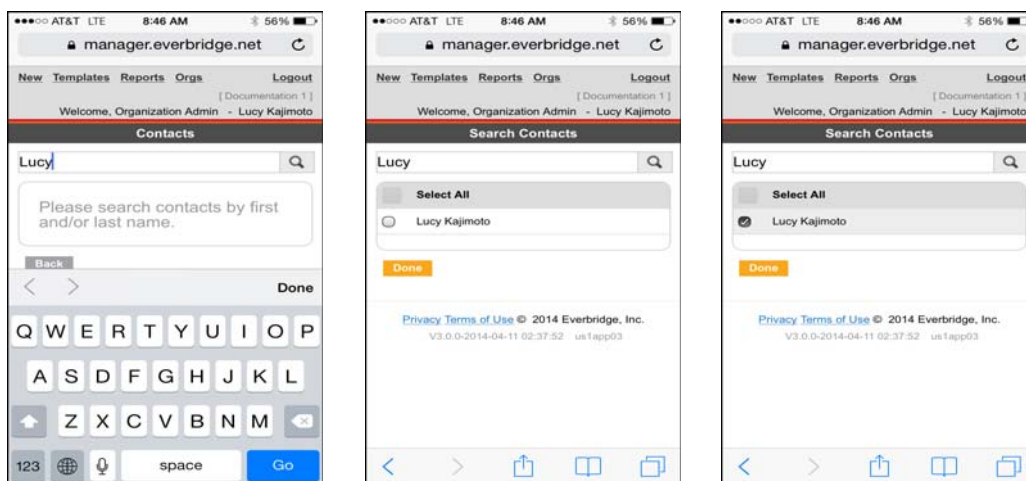




- 8 Under Select Contacts, select the contacts by Group, Individuals, Rules:
- a Groups—Select Groups. The groups are listed in alphabetical order. Select the check box next to the desired group name or names. Or, select the Select All check box at the top of the list. Tap OK to return to the New Notification screen.



- b Individuals—Select Individuals. To locate an individual, type the first or last name in the Search bar, then tap the Search icon. Tap to select the desired individual from the list, then Tap Done. Repeat searching until you have selected all the individuals you want to notify. Tap Back to return to the New Notification screen.

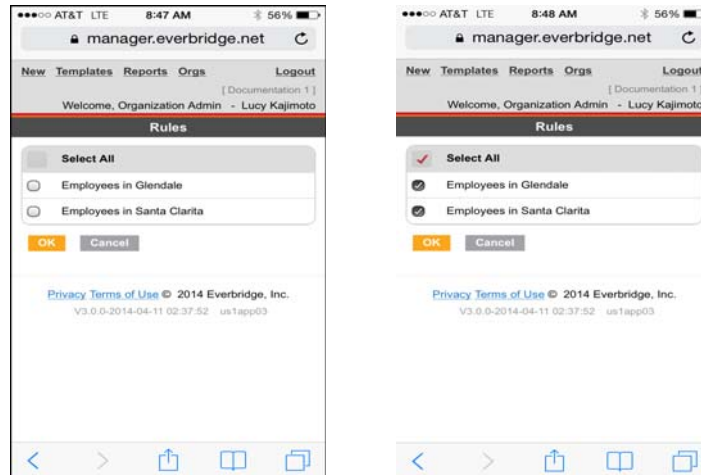


To see all the members in your organization, tap Search without first typing a character in the Search bar. However, if you have a large contact database, it could take quite some time to return the results, especially if you have a low bandwidth at the time. It is better to narrow the results (search for individuals) as much as possible before tapping Search.

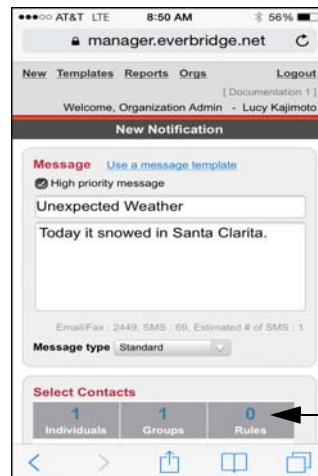
**NOTE:** To ensure you send your notification as quickly as possible, Everbridge does not display all contacts by default. The list of contacts could be very large and thus take quite some time to populate the list, which would interfere with your ability to send your notification in a timely manner.



- c Rules—Select Rules. The rules are listed in alphabetical order. Select the radio button next to the desired rule or rules. Or, select the Select All check box at the top of the list. Then, tap OK. If there are no rules, tap Back to return to the New Notification screen.



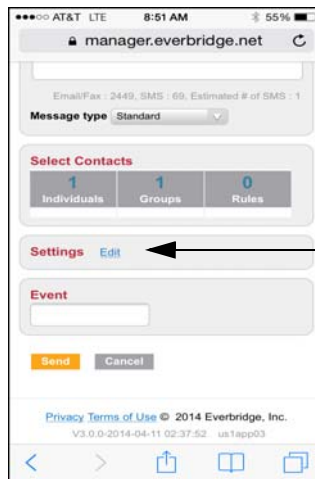
- d The number of groups, individuals, and rules you have selected is shown on the New Notification screen.



Number of selected contacts



- 9 To review and/or change the Settings.
  - a From the Settings pane, Tap Edit.



Edit link



AT&T LTE 8:52 AM 55%

manager.everbridge.net

New Templates Reports Orgs Logout

[ Documentation 1 ]

Welcome, Organization Admin - Lucy Kajimoto

Settings

OK Cancel

**Settings**

Sender email display:  
Lucy.Kajimoto@Everbridge.com

Sender caller ID:  
United States 8182309732

**Delivery methods:**

☒ Mobile Member App ☒ Work Email  
☒ Work Phone

**Mobile Member App Settings:**

☒ Request location  
☒ Request image  
☒ Request additional information  
☒ Enable Sharing Options

☐ Apply voice delivery throttling rules

Duration 1 hr(s)

Contact cycles 1

Interval between cycles 0 min(s)

Interval between delivery methods 0 min(s)

Voicemail preference  
Message Only

☒ Confirm

Language English (US)

OK Cancel

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v3.0.0-2014-04-11 02:07:02 verPage05

- b Change the settings, as needed.
- c When done, tap OK and return to the next step.





- 10 As needed, perform these additional steps for Polling, Quota, and Conference Bridges. Then, proceed to the procedure *Sending the Notification from the Mobile Site* on page 321.

**Polling**—In a polling message, you create choices for answers to the message. The contact chooses from the answers and you see the polling responses in the notification results. You can also optionally send a Follow Up with the results.

- a When your Message Type is Polling, the Polling pane is displayed.

- b From the Display drop-down list, select the number of items you need.
- c Add each item (less than 250 characters per item and less than 500 characters for all items).



**Quota**—In a Quota message, you can add options for contacts to respond to a list of choices and then you send a Follow Up with the results.

- a When your Message Type is Quota, the Quota pane is displayed.

- b From the Display drop-down list, select the number of items you need.
- c Add each item (less than 250 characters per item and less than 500 characters for all items).
- d Next to each line item, type the quota number you need.

**Conference**—In a conference message, the contact can connect to a conference bridge.

- a When your Message Type is Conference, the Conference Bridge drop-down list becomes available.

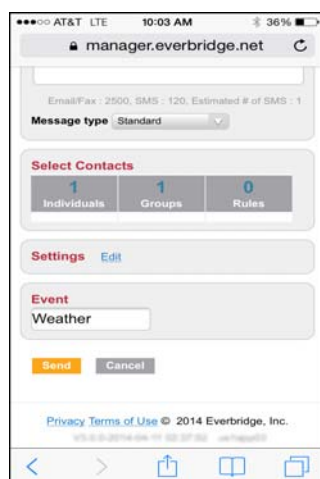
- b Select the desired Everbridge Conference Bridge from the spinner and tap Done.
- 11 Proceed to the procedure *Sending the Notification from the Mobile Site* on page 321.



---

# Sending the Notification from the Mobile Site

Once your notification is set up, you are ready to send it.



## To send the notification from the mobile site

- 1 Tap Send.  
The Notification Report screen is displayed, where you can watch the results. When the notification is first starting up, the values are all zero since no contacts have yet been notified.



AT&T LTE 8:57 AM 54%

manager.everbridge.net

New Templates Reports Orgs Logout

Welcome, Organization Admin - Lucy Kajimoto

Notification Report

Stop Refresh Send Follow Up

**Unexpected Weather -**  
3083034899266347

**Confirmation Status**

Status	Count	%
Confirmed	0	0.0
Not Confirmed	0	0.0
Confirmed Late	0	0.0
Unreachable	6	100.0

**Confirmation Status by Path**

Path	Count	%
Mobile Member App	0	0
Work Email	0	0
Work Phone	0	0

Notification ID: 3083034899266347

Message Title: Unexpected Weather

Message Text: Today it snowed in Santa Clarita.

Notification Type: Standard

Priority: Yes

Start: 2014-05-12 08:57:00 GMT-07:00

End: 2014-05-12 09:57:00 GMT-07:00

Sent by: Lucy Kajimoto

Event:

**Notification Settings**

Sender Email: Lucy.Kajimoto@Everbridge.com

Sender Caller ID: United States: 8182309732

Delivery Methods: Mobile Member App, Work Email, Work Phone

Apply Voice Delivery: No

Throttle Rules:

Notification Duration: 1 hour(s)

Contact Cycles: 1

Voicemail preference: Message Only

Confirm: Yes

Mobile Member App Settings: Request Image: Yes, Request Comment: Yes, Request Location: Yes, Allow Share: Yes

Language: English (US)

Stop Refresh Send Follow Up

< > ↑ ↺ ↻

- Confirmation Status—For each of the confirmation states (Confirmed, Not Confirmed, Confirmed Late, and Unreachable), the number of contacts for each confirmation state appears.
  - Confirmation Status by Path—The Confirmation Status by Path chart shows the number of contacts that confirmed by delivery method.
- 2 Proceed to *Viewing Reports in the Mobile Site* on page 325 for further details.

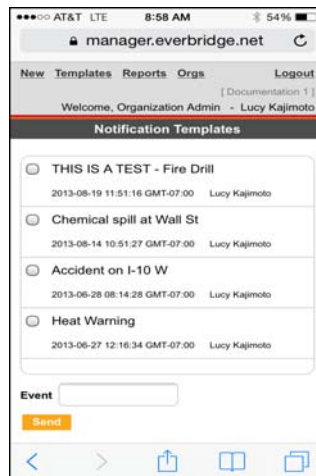


# Sending Notification Templates from the Mobile Site

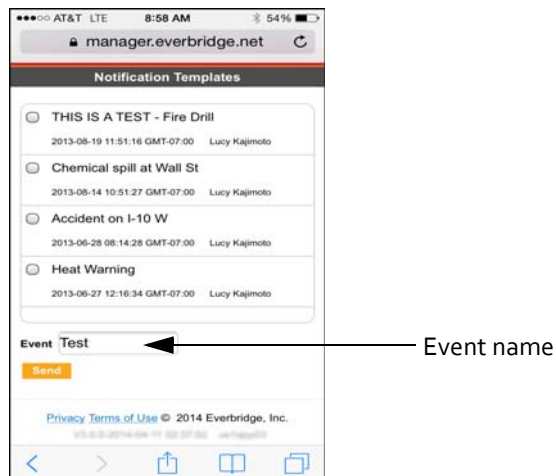
From the Everbridge mobile site, you can launch notifications from templates that you have previously created. These are the same templates available on the Notifications tab on the web Manager Portal.

## To use Notification Templates from the mobile site

- 1 Tap Templates in the upper left-hand corner.  
The list of existing Notification Templates is displayed.



- 2 Tap one or more check boxes of the notification templates you want to launch.
- 3 Optionally, type the Event name.



- 4 Tap Send.



Once you launch the notification, you see the notification results. When the notification is first starting up, the values are all zero since no contacts have yet been notified.

- 5 Optionally, tap Stop to stop the notification.  
You can optionally Rebroadcast the notification or send a Follow Up notification.
- 6 See *Viewing Reports in the Mobile Site* on page 325 for details.

# Viewing Reports in the Mobile Site

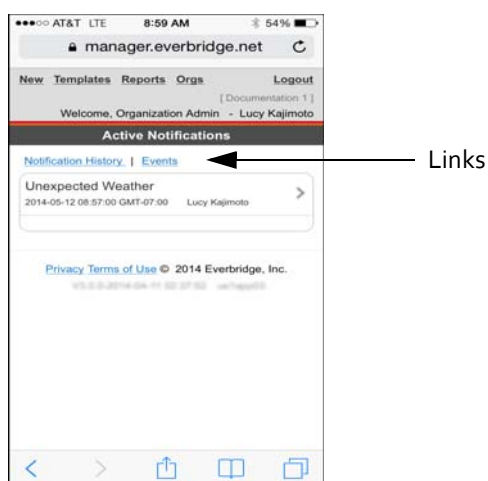
Notification results are also on the Reports screen. You can view Active Notifications, Events, and Notification History. While the notification is active, you will see it in the Active Notifications list. When it ends, it will be in the Notification History list. If the list of reports on any of these screens is longer than will fit, scroll to the bottom of the list and tap More.

If you are viewing an active notification, you can:

- ◆ Stop the notification.
- ◆ Refresh the screen to display the updated statistics.

## To view reports in the mobile site

- 1 Tap Reports.



You can also tap the link for Notification History or Events. The list of reports under the selected heading is displayed.

If you select Events, you see the list of events. Tap an event to see a list of the notifications that are part of the event. Tap on any notification to drill down to the details of that notification.

- 2 Tap a report to open it.



For each notification, you can view the notification report.

The screenshot shows the Everbridge mobile site interface. At the top, there's a status bar with AT&T LTE, 9:00 AM, and 54% battery. Below that is the URL bar showing 'manager.everbridge.net'. The main header includes links for 'New', 'Templates', 'Reports', 'Orgs', and 'Logout', along with a user greeting 'Welcome, Organization Admin - Lucy Kajimoto'. The title of the page is 'Notification Report'. Below the title are three buttons: 'Stop', 'Refresh', and 'Send Follow Up'. A 'Rebroadcast' button is also present. The main content area displays details for a notification titled 'Unexpected Weather' with ID '3083034899266347'. It includes a 'Confirmation Status' table and a 'Confirmation Status by Path' table. Below these tables, there's a section for 'Notification ID: 3083034899266347' with fields for 'Message Title', 'Message Text', 'Notification Type', 'Priority', 'Start', 'End', 'Sent by', and 'Event'. At the bottom, there's a 'Notification Settings' section with fields for 'Sender Email', 'Sender Caller ID', 'Delivery Methods', 'Apply Voice', 'Delivery Throttle Rules', 'Notification Duration', 'Contact Cycles', 'Voicemail preference', 'Confirm', 'Mobile Member App Settings', and 'Language'. At the very bottom, there are links for 'Privacy Terms of Use' and '© 2014 Everbridge, Inc.'.

Status	Count	%
Confirmed	0	0.0
Not Confirmed	1	14.29
Confirmed Late	0	0.0
Unreachable	6	85.71

Path	Count	%
Mobile Member App	0	0
Work Email	0	0
Work Phone	0	0

Notification ID: 3083034899266347

Message Title: Unexpected Weather

Message Text: Today it snowed in Santa Clarita.

Notification Type: Standard

Priority: Yes

Start: 2014-05-12 08:57:00 GMT-07:00

End: 2014-05-12 09:57:00 GMT-07:00

Sent by: Lucy Kajimoto

Event:

Notification Settings

Sender Email: Lucy.Kajimoto@Everbridge.com

Sender Caller ID: United States: 8182309732

Delivery Methods: Mobile Member App, Work Email, Work Phone

Apply Voice: No

Delivery Throttle Rules: Notification Duration: 1 hour(s), Contact Cycles: 1

Voicemail preference: Message Only

Confirm: Yes

Mobile Member App Settings: Request Image: Yes, Request Comment: Yes, Request Location: Yes, Allow Share: Yes

Language: English (US)

3 Tap Refresh to view updated confirmation statuses.

4 Optionally, tap Stop to stop the active notification.

5 Optionally, tap Rebroadcast.

If the notification is no longer active and some of the contacts have not confirmed, you can send the notification again by tapping Rebroadcast. This sends the original message again to all of the unconfirmed contacts.

6 Optionally, tap Send Follow Up.

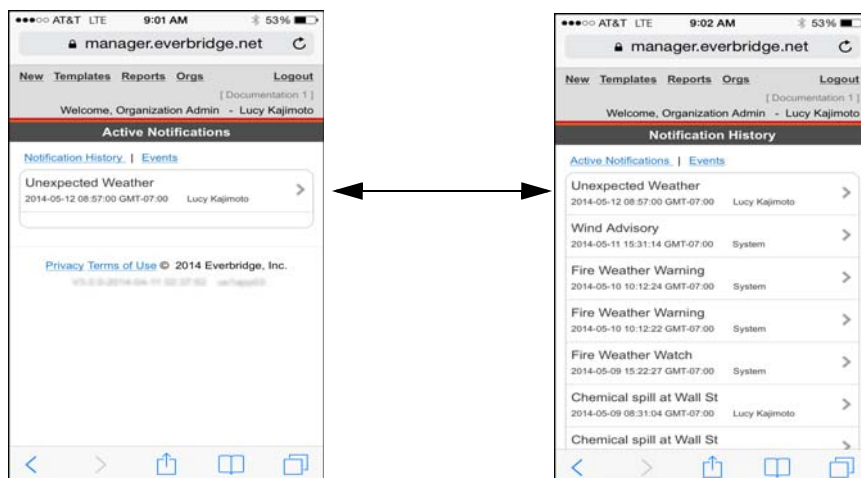
In a Follow Up notification, you can change the configuration of the notification, unlike a rebroadcast, which simply resends the original notification. (See the procedure *To send a Follow Up notification.*)





## To send a Follow Up notification

- 1 From the Reports screen, access the report from either: Active Notifications or Notification History. (It is the identical report.)





- 2 Tap the report to open it.

AT&T LTE 7:54 AM 87%

manager.everbridge.net

New Templates Reports Orgs Logout

[ Documentation 1 ]

Welcome, Organization Admin - Lucy Kajimoto

Notification Report

Stop Refresh Send Follow Up

Rebroadcast

**Unexpected Weather -**  
[3522839550385421](#)

**Confirmation Status**

Status	Count	%
Confirmed	0	0.0
Not Confirmed	1	100.0
Confirmed Late	0	0.0
Unreachable	0	0.0

**Confirmation Status by Path**

Path	Count	%
Mobile Member App	0	0
Work Email	0	0
Work Phone	0	0

Notification ID: [3522839550385421](#)

Message Title: Unexpected Weather

Message Text: Today it snowed in Santa Clarita.

Notification Type: Standard

Priority: Yes

Start: 2014-05-13 07:26:41 GMT-07:00

End: 2014-05-13 08:26:41 GMT-07:00

Sent by: Lucy Kajimoto

Event:

**Notification Settings**

Sender Email: Lucy.Kajimoto@Everbridge.com

Sender Caller ID: United States: [8182309732](#)

Delivery: Mobile Member App

Methods: Work Email, Work Phone

Apply Voice

Delivery: No

Throttle Rules:

Notification Duration: 1 hour(s)

Contact Cycles: 1

Voicemail preference: Message Only

Confirm: Yes

Mobile Request Image: Yes

Member App Request Comment: Yes

Settings: Request Location: Yes

Allow Share: Yes

Language: English (US)

Stop Refresh Send Follow Up

Rebroadcast

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V3.3.0-2014-04-11 02:07:02 ver140404



- 3 Tap Send Follow Up.

- 4 Make any changes to the message or notification settings, as needed.
- 5 From the Follow up on pane, choose one or more types of confirmation states to send the Follow Up notification by selecting the desired check boxes. (Or, if you are sending a Follow Up to a polling notification, you can follow-up based on the polling responses.)

Follow up on pane

- 6 Tap Send.

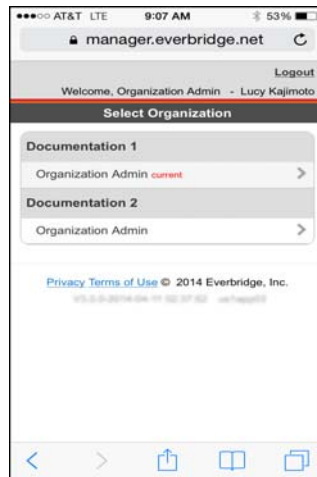


## Switching Organizations in the Mobile Site

If you are registered in more than one organization in your account, you can switch to the organization you want to manage. (If there is only one organization in your account, you will not need to do this.)

### To switch Organizations in the mobile site

- 1 Tap Orgs in the upper left-hand corner of the screen.  
The organization you are currently managing is indicated by the word “**current**.”



- 2 Select the desired organization.  
The New Notification screen appears.

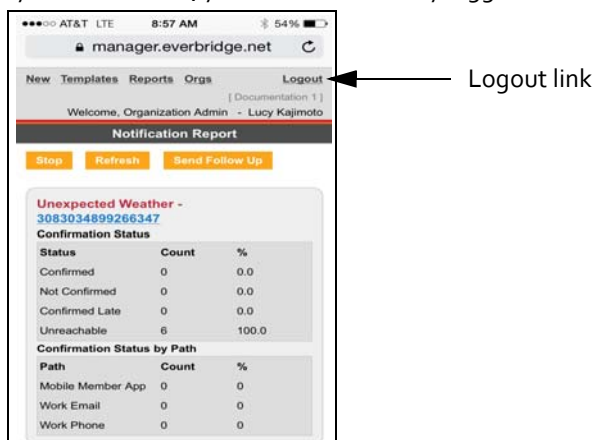


# Logging Out from the Mobile Site

When you are done with your session, log out.

## To log out from the mobile site

- 1 From any screen, tap Logout in the upper right-hand corner when you are ready to end your session. Or, you are automatically logged out after 30 minutes of inactivity.



You are returned to the Log In screen.





# Organization Settings

This appendix describes the configuration options available to you in the Everbridge Suite system. The Organization tab is provided for Administrators to configure settings specific to your organization.

**The following topics are covered:**

- ♦ *Overview of Organization Settings*
- ♦ *Organization*
- ♦ *Map*
- ♦ *Publishing Options*
- ♦ *Notifications*
- ♦ *Contacts and Groups*
- ♦ *Secure Messaging*
- ♦ *Single Sign-On*



# Overview of Organization Settings

The Organization tab is provided for Administrators to configure settings specific to your organization.

The screenshot displays the Everbridge web interface for Organization Settings. The top navigation bar includes links for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings (highlighted), and Access. The left sidebar shows the 'Organization' tab selected, with a sub-menu for 'Base Information' and other settings. The main content area, titled 'Organization Details', lists the following information:

Organization Details	
Organization Name	Documentation
Organization ID	8800387990194
Organization Status	Active
Country	United States
Contact Data Store Location	uscontact
Account Name	New US SQA Account
Last Modified Date	2014-02-03 14:30:39 PST
Last Modified By	Lucy Kajimoto

At the bottom of the page, there is a footer with links for Privacy and Terms of Use, and a copyright notice for 2014 Everbridge, Inc.





# Organization

## Base Information

This page displays the Organization Details, as entered by Everbridge:

- ◇ Account Name
- ◇ Organization Name
- ◇ Organization ID
- ◇ Displays the status of your organization (“Active”). An account can have more than one organization in it. The Organization Details show you to which organization you are logged in.
- ◇ The default Country for your organization.
- ◇ The Contact Data Store Location shows where personal information is being stored. There are contact data stores in several locations around the world. Your data is in one suitable for your organization.
- ◇ When and who last modified the configuration of the organization.

The screenshot shows the Everbridge Settings page. The top navigation bar includes links for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings (highlighted), and Access. The left sidebar shows the Organization menu with sub-items: Base Information (selected), Login Message, Map, Interactive Visibility, Publishing Options, Notifications, Contacts and Groups, and Secure Messaging. The main content area displays the Organization Details table.

Organization Details	
Organization Name	Documentation
Organization ID	8800387990194
Organization Status	Active
Country	United States
Contact Data Store Location	uscontact
Account Name	New US SQA Account
Last Modified Date	2014-02-03 14:30:39 PST
Last Modified By	Lucy Kajimoto

At the bottom of the page, there is a footer with links for Privacy and Terms of Use, and a copyright notice: © 2014 Everbridge, Inc.



## Login Message

Optionally, you can type a login message for your users to see when they log into the application. When you finish typing your message, click Save.

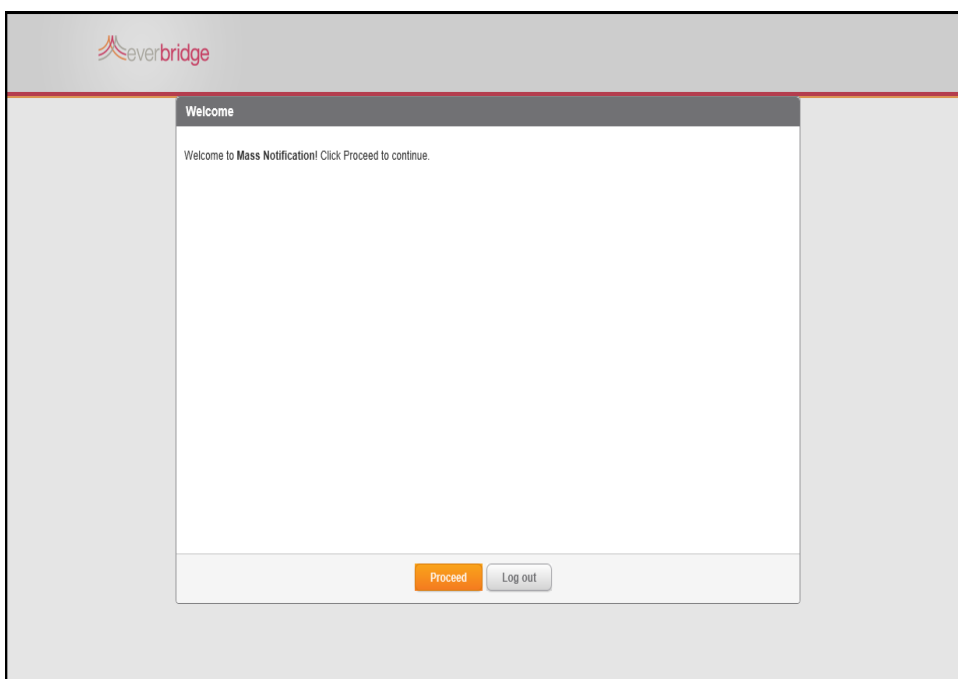
For example, it could be the terms and conditions or other legal information about using the portal. Or, it could be about security, a current situation, or any other topic you want them to see before gaining access to the application.

From the Organization tab, select Login Message under Organization. You have a maximum of 2,500 characters to type your message in the text box. You can add messages in advance that you are not displaying to users when they log in. To make the message appear when the users log in, select the check box: Display the message to users. Click Save when you are done.

The screenshot shows the 'Settings' interface with two tabs: 'Organization' and 'Member Portal'. The 'Organization' tab is active, and a sidebar on the left lists various settings categories: Organization (expanded), Base Information, Login Message (highlighted), Map, Interactive Visibility, Publishing Options, Notifications, Contacts and Groups, and Secure Messaging. The main content area is titled 'Login Message' and includes a help icon. Below the title is a descriptive sentence: 'Your users will see this message when they log in. They must click through it in order to access the application.' There are fields for 'Last Modified Date:' and 'Last Modified By:'. A checkbox labeled 'Display the message to users' is currently unchecked. Below this is a large text editor with a rich text toolbar containing options for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and image insertion. At the bottom of the text editor is an orange 'Save' button.



When the users login to the Everbridge system, your Login Message is displayed. The users must click the Proceed button in order to continue to the application.



To change the login message, return to the Login Message page. You can clear the check box: Display the message to users. This message is not shown to users although there is text in the text box. Click Save.

You can edit or delete the message by typing in the text box, then clicking Save.

## HTML Messages

You can use HTML markup in the message, not just plain text. This allows you to control the appearance of the message, as well as include images.



# Map

## Map Defaults

This page allows you to configure your map defaults for use in the map widget in the Manager Portal. The map widget displays a map of the area in which you are interested using the settings from this page. You can also configure the map projection a contact upload file will use when you upload a list of addresses.

The screenshot shows the Everbridge Settings interface. At the top, there's a navigation bar with icons for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings (highlighted in red), and Access. Below this, the 'Settings' page is open, with tabs for 'Organization' and 'Member Portal'. The left sidebar shows a tree view with 'Map' expanded, and 'Map Defaults' selected. The main content area is titled 'Map Defaults' and contains four settings: 'Default Base Map' (set to Google Maps), 'Default Map Center' (set to New York City, NY), 'Default Map Zoom Level' (set to Level 5 - City), and 'GIS Default Projection' (set to EPSG:4326). There is a 'Save' button and a 'Default Map Preview' section with an 'Update' button. A vertical scrollbar is visible on the right side of the settings area.

These defaults include:

- ◇ Default Base Map — Select one of the available maps to be used in the map widget. Locations and selection shapes are shown on this map. Choose the base map that your organization prefers. Users preparing a notification can change the default map.
- ◇ Default Map Zoom Level — Select the Map Zoom Level. This is your starting resolution level when you view the map. You can set it to start with a high-level (world or country) zoom or street zoom level. Users can change the default zoom level.
- ◇ Default Map Center — Type a default location on which to focus the map. Users will see this location in the center when they access the map widget. Regardless of the default center for the map, you can always move to a different location on the map while you are using it.

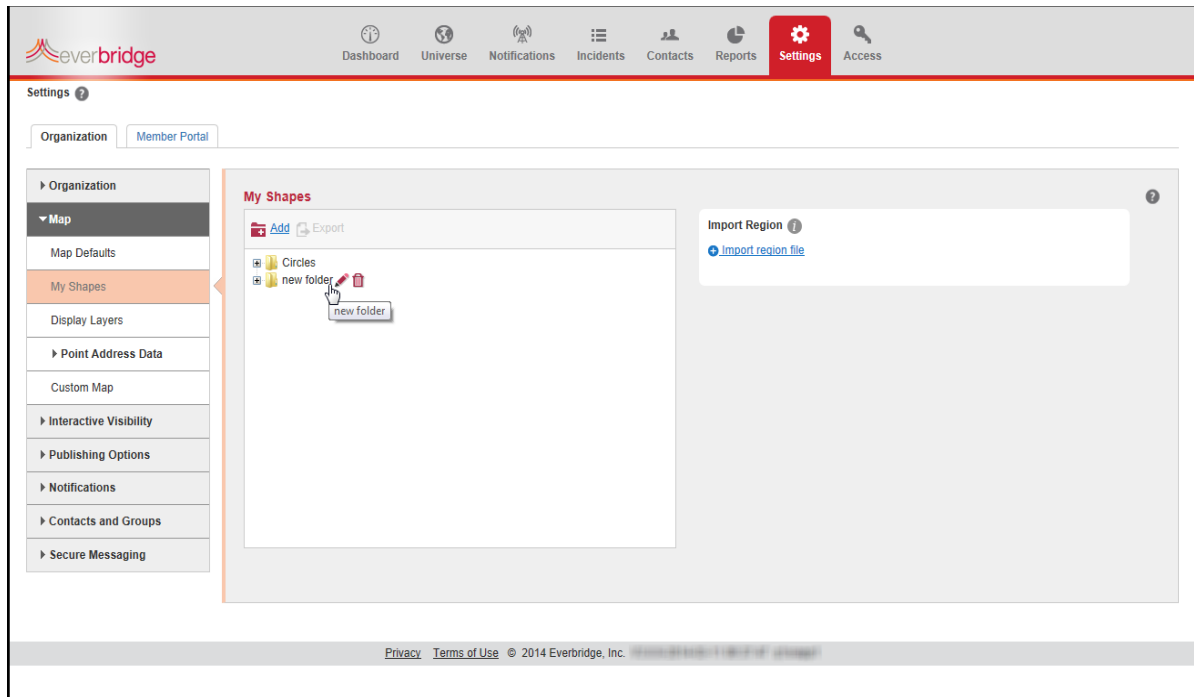


- ◇ GIS Default Projection — From the drop-down list, select the default GIS (Geographic Information System) projection (or coordinate system) to use for Contact addresses. The GIS Default Projection is only used when:
  - You are uploading a file of contact information to the system.
  - The upload file already contains geo-coding for the addresses. In that case, you need to select the projection used for the geo-coding values from the list. If your upload file contains values that are from a projection that is not on the list, leave it set to the default. After the file is uploaded, check the addresses as they are displayed on map (in the Universe tab) to ensure the addresses appear in the exact location.

Click Save after making any changes to your Map settings. Then, click the Universe tab to see the effect of the default settings.

## My Shapes

You can upload polygons into Settings > Map > My Shapes to select contacts from the map for a notification. The My Shapes library accepts only closed, single-loop polygons; the application does not accept or load point or line shapes for selecting contacts. Also, your file can contain multiple polygons, which you will be able to load/hide separately on the map. This feature does not currently accept polygons with holes (for example, donuts) and multi-part polygons. In addition, you can export any shapes from the My Shapes library; the exported shape will be provided in Shapefile format.



- ◇ Import Region — You can upload files using one of the following formats:
  - A KML (Keyhole Markup Language) file, which must not be compressed. The maximum file size is 100 MB.



- A compressed Shape file. If you upload shapes to My Shapes, make sure there are only shapes, and not nested folders, contained in the compressed file (zip file). In other words, the zip file can only contain the shapes. The maximum file size is 100 MB.

In the field: **Region name**, type a name as it should appear to users in the My Shapes list in the map widget. Select a folder for the upload, if available. Click **Upload to portal**. You can manage the folders and files in the My Shapes library. When you select a file, you can rename it by clicking the Pencil icon or remove it by clicking the Trash Bin. You can add folders to your library in advance of uploading files.

- ◇ Add — You can add folders to contain different libraries of shapes to make it convenient to organize your shape files. When you select a folder, you can rename it by clicking the Pencil icon or remove it by clicking the Trash Bin. (Be careful if you delete a folder. Any shape files in that folder are also deleted.) To move a file to a folder, click the file and drag it to the folder; this way, you can locate and use your shapes quickly.
- ◇ Export—You can export shapes from My Shapes. This is useful if you have saved custom shapes that you have drawn on the map widget. Select the shape you want to export, and click Export. Click the radio button: Save File, select the location to save the file, and click Save. The shape is provided in a Shapefile format.

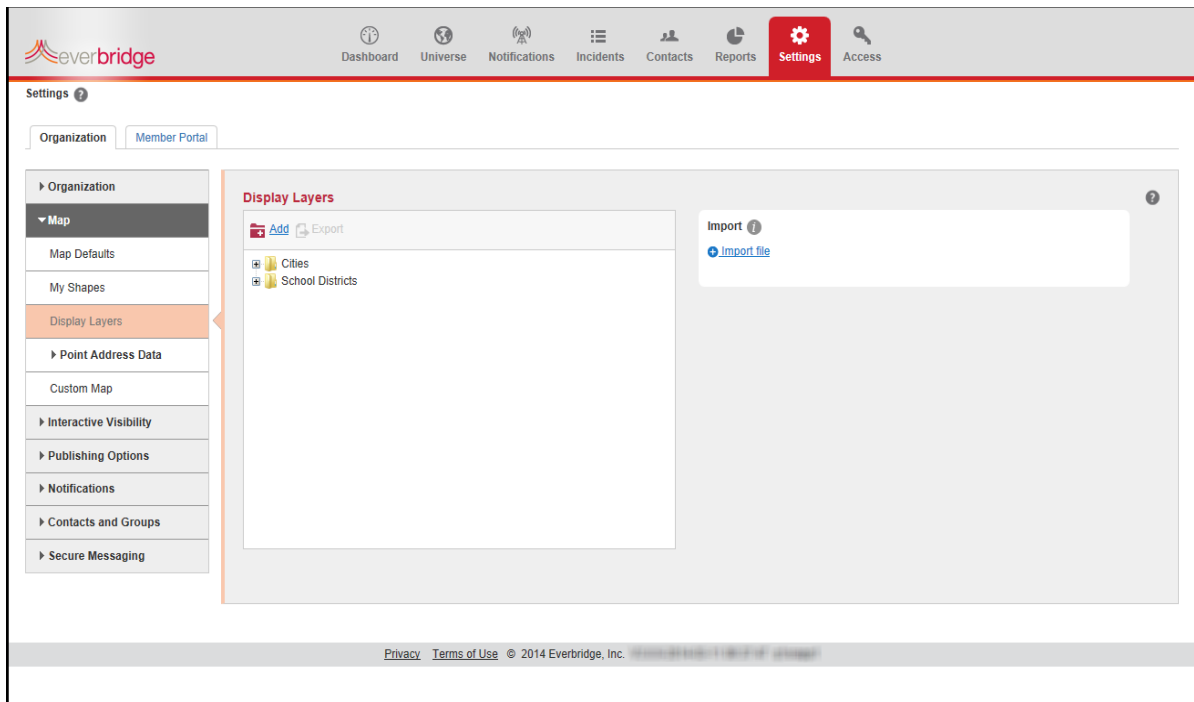
## Restrictions

The following are the restrictions for shapes loaded into My Shapes:

- ◇ Single loop polygon—no donuts)
- ◇ Closed loop polygon—does not look like the letter “C”; the polygon start and end coordinates must match
- ◇ Non-self intersecting—does not cross over on itself like a figure 8
- ◇ Single-part polygon—a one-to-one match between a record in the shape record with an attribute record in the DBF record (instead, create multi-part polygons)
- ◇ Polygons defined as circles must have a ring, a center, and a radius

## Display Layers

You can upload any shape (polygons, points, or lines) into Settings > Map > Displays Layers that you want to overlay on the map for reference. For example, your Display Layer could be county or city boundaries (lines), school district buildings (points), or even school buildings (closed polygons). Shapes loaded into the Display Layers library cannot be used to select contacts from the map for a notification. This feature currently does not support multi-part polygons. Your file can contain multiple shapes that you will be able to load/hide separately on the map.



From the Organization tab, under Map > Display Layers, you can:

- ◇ Add display layers. The maximum file size is 100 MB.
- ◇ Import the shape files in a compressed file (zip format). If you upload shapes to Display Layers, ensure there are only shapes, and not nested folders, contained in the compressed file (zip file). In other words, the zip file can only contain the shapes. The maximum file size is 100 MB.

The process to manage uploads and process these shapes is the same as the process described above for *My Shapes* on page 339.



## Point Address Data

An organization can use this feature to achieve a custom level of geo-coding results for contact addresses. An administrator can load a master list of reference addresses and geo-points, and can manage the master list on-line. In order to leverage this feature, an administrator loads reference data and publishes the data to the Everbridge geo-coding application. The Everbridge application can use this custom data to geo-code an address added to any contact record via the REST API, the Manager Portal or the Member Portal.

### Published

In order to leverage this feature, you must publish a master list of addresses and geo-points. Your master list of addresses can contain any number of address records.

You can upload a file containing your master list of addresses, or you can manually add the addresses to your master list.

Susan Slobo Test Organization (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe Notifications Incidents Contacts Reports Settings Access

Settings ?

Organization Member Portal

Organization

Map

Map Defaults

My Shapes

Display Layers

Point Address Data

Published

Uploads

Custom Map

Interactive Visibility

Publishing Options

Notifications

Contacts and Groups

Secure Messaging

Point Address Data: Published Geo-Coding Application Everbridge Service

Delete Add Address Search >Advanced Search Reset

	Record ID	Country	Street Address	Apt/Suite/Unit	City	State/Province	Postal Code	
<input type="checkbox"/>	8812208	United States	31503 Poudre Canyon Highway	100	Bellvue	CO	80512	<a href="#">View on map</a>
<input type="checkbox"/>	8812211	United States	31506 Poudre Canyon Highway	103	Bellvue	CO	80512	<a href="#">View on map</a>
<input type="checkbox"/>	8812213	United States	31508 Poudre Canyon Highway	105	Bellvue	CO	80512	<a href="#">View on map</a>
<input type="checkbox"/>	8812214	United States	31509 Poudre Canyon Highway	106	Bellvue	CO	80512	<a href="#">View on map</a>
<input type="checkbox"/>	8812215	United States	31510 Poudre Canyon Highway	107	Bellvue	CO	80512	<a href="#">View on map</a>
<input type="checkbox"/>	8812216	United States	31511 Poudre Canyon Highway	108	Bellvue	CO	80512	<a href="#">View on map</a>
<input type="checkbox"/>	8812217	United States	31512 Poudre Canyon Highway	109	Bellvue	CO	80512	<a href="#">View on map</a>
<input type="checkbox"/>	8812209	United States	31504 Poudre Canyon Highway	101	Bellvue	CO	80512	<a href="#">View on map</a>
<input type="checkbox"/>	8812210	United States	31505 Poudre Canyon Highway	102	Bellvue	CO	80512	<a href="#">View on map</a>
<input type="checkbox"/>	8812212	United States	31507 Poudre Canyon Highway	104	Bellvue	CO	80512	<a href="#">View on map</a>

Page 1 of 9 >> << 10 View 1 - 10 of 81

You can perform the following tasks on this page:

- ◇ View your current master list of addresses
- ◇ Add an address record
- ◇ Edit an address record
- ◇ Delete an address or selection of addresses
- ◇ View the address location on the map using the geo-point in the address record



- ◇ Search for an address record or group of address records
- ◇ Set the geo-coding service

## To add an address record

You can add an unlimited number of addresses to your Organization's master list of addresses. However, Everbridge recommends you also insert the address record to your system of record to ensure your next upload does not overwrite your changes.

- 1 Click Add Address.

- 2 Populate the required fields.
- 3 Preview the location on the map.
- 4 Select Save to close the overlay and save the address to the master list.

## To edit an address record

You can edit any address record in your Organization's master list of addresses. However, Everbridge recommends you also make the same changes to the address record in your system of record to ensure your next upload does not overwrite your changes.

- 1 Click the Pencil icon for the desired address.
- 2 Modify the address record.
- 3 Preview the location on the map, if necessary.

**NOTE:** The Preview button refreshes the location of an address only if you have changed the Latitude and/or Longitude fields.

- 4 Select Save to close the overlay and save the changes to the address record.



### To delete one or more address records

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

- 1 Select the check box for the address record(s).
- 2 Click Delete.
- 3 Confirm the request to delete the record(s).

### To view an address location on the map

- 1 Select View on Map link for the desired address.
- 2 Review the address details and the address location on the map.
- 3 Close the overlay.

### To search for an address using the quick search field

- 1 Enter the desired search string in the Search field.
- 2 Select the Search icon.  
The application will search the Street Address, City, and Postal Code fields for address records that contain the search string in any of those fields

### To search for addresses using the Advance Search feature

- 1 Select the Advance Search link.
- 2 Select the desired fields to search and the search criteria for each field.
- 3 Click Search.

### To set the geo-coding service

If you load non-geo-coded addresses into contact records or collect contact information via the Member Portal, the Everbridge application can use one of two services for geo-coding addresses:

- ◇ Set to "Everbridge Service" if you want Everbridge to use its commercial geo-coding API service.
- ◇ Set to "My Point Address Info" if you want Everbridge to use your Published data for geo-coding addresses; this application uses an exact match rule for geo-coding addresses. In other words, every component (Street Address, City, State, and Postal Code) of the address submitted via the API, Manager Portal, and Member Portal will be compared to the corresponding address component in your Point Address data. The submitted address will be geo-coded (the application assigns the Latitude and Longitude to the address) if every component is an exact match.



## Uploads

You can upload your master list of Point Addresses by means of a CSV file. You can download the template from this page that contains the required column headers for your file.

The screenshot shows the Everbridge Settings page for an Organization Admin. The left sidebar contains a navigation menu with options like Organization, Map, Map Defaults, My Shapes, Display Layers, Point Address Data (expanded), Published, Uploads (selected), Custom Map, Interactive Visibility, Publishing Options, Notifications, Contacts and Groups, and Secure Messaging. The main content area is titled 'Point Address Data: Uploads' and includes buttons for Refresh, Upload to Portal, and Download Template. Below these is a table with columns: File Name, Batch ID, Upload Status, Status, Uploaded on, Received, and Loaded. The table lists four uploads, all with a status of 'Unpublished' except for the last one which is 'Published'. At the bottom of the table, there is a pagination control showing 'Page 1 of 10' and a 'View 1 - 4 of 4' link.

File Name	Batch ID	Upload Status	Status	Uploaded on	Received	Loaded
Point_Address_Data_LK1.csv	21998822490118	Completed	Unpublished	2014-06-03 09:32:36 PDT	81	81
Point_Address_Data_LK1.csv	21998822490115	Completed	Unpublished	2014-03-27 14:03:18 PDT	81	81
Point_Address_Data_LK1.csv	21998822490114	Completed	Unpublished	2014-03-27 13:59:01 PDT	81	81
Point_Address_Data_LK1.csv	21998822490113	Completed	Published	2014-03-27 13:28:16 PDT	81	81

## Upload Data Elements

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

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



Field	Required	Comments
Address Record ID	Y	Client-defined unique identifier for the address record. Maximum Length: 50 Data Type: String Cell cannot be empty Value must be unique in file <b>NOTE:</b> If two records have the same Address Record ID, then the first record in the CSV file is loaded to the database. The second record is not loaded to the database and is listed in the Errors tab.
Street Address	Y	Includes building number, predirectional, street name, street type, and post directional Maximum Length: 100 Data Type: String Cell cannot be empty
Apt/Suite/Unit	N	Apartment, Suite, Unit, Floor, and so on Maximum Length: 10 Data Type: String
City	Y	City name Maximum Length: 40 Data Type: String For US addresses, jurisdiction name below county level Cell cannot be empty
State/Province	Y	Administrative level below county level Maximum Length: 40 Data Type: String For US addresses, Everbridge recommends full State name, e.g., "California" Cell cannot be empty
Postal Code	Y	For US Addresses, ZIP Code or ZIP Code + 4 Maximum Length: 10 Data Type: String Cell cannot be empty Length 99999 or 99999-9999 or 999999999 if Country is "United States"
Country	Y	Full ISO country name Maximum Length: 40 Data Type: String Cell cannot be empty Country name is in the ISO country list



Field	Required	Comments
Longitude	Y	Longitude value, including negative sign Data Type: Precision Not validated for client jurisdiction Cell cannot be empty Minimum Value: -180.0000000000 Maximum Value: 180.0000000000 Recommend Spherical Mercator projection
Latitude	Y	Latitude value Data Type: Precision Not validated for client jurisdiction Cell cannot be empty Minimum Value: -90.0000000000 Maximum Value: 90.0000000000 Recommend Spherical Mercator projection

## Uploading a CSV File

Select the Upload to Portal button. The application displays the following:

The screenshot shows the Everbridge Settings page for 'Susan Stoba Test Organization (Organization Admin)'. The 'Settings' menu is open, and the 'Point Address Data: Uploads' section is selected. A modal dialog titled 'Upload to Portal' is displayed, prompting the user to upload a Point Address File. The dialog includes instructions on file formats (csv, tar.gz, or compressed zip) and size (must not exceed 100 MB). A table in the background shows a list of uploaded files with columns for File Name, Status, Uploaded on, Received, and Loaded.

File Name	Status	Uploaded on	Received	Loaded
Point_Address_Data_1.csv	Unpublished	2014-06-03 09:32:36 PDT	81	81
Point_Address_Data_2.csv	Unpublished	2014-03-27 14:03:18 PDT	81	81
Point_Address_Data_3.csv	Unpublished	2014-03-27 13:59:01 PDT	81	81
Point_Address_Data_4.csv	Published	2014-03-27 13:28:16 PDT	81	81



Click the link: Select a file. Then, select the desired CSV file and click Upload to Portal button at the bottom of the overlay.

The screenshot shows the Everbridge Organization Admin interface. The left sidebar contains navigation links for Organization, Map, Point Address Data, and other settings. The main content area is titled 'Point Address Data: Uploads'. An 'Upload to Portal' modal is open, displaying instructions for uploading a Point Address File. The modal includes a 'Select a file' button and a file list. The background shows a table of uploads with columns for File Name, Status, Uploaded on, Received, and Loaded.

File Name	Status	Uploaded on	Received	Loaded
Point_Address_Data_LK1.csv	Unpublished	2014-06-03 09:32:36 PDT	81	81
Point_Address_Data_LK1.csv	Unpublished	2014-03-27 14:03:18 PDT	81	81
Point_Address_Data_LK1.csv	Unpublished	2014-03-27 13:59:01 PDT	81	81
Point_Address_Data_LK1.csv	Unpublished	2014-03-27 13:28:16 PDT	81	81

Your upload is displayed on the Point Address Data: Uploads page. The application displays the following information for each upload:

- ◆ File Name (as submitted by the user)
- ◆ Batch ID (system-generated)
- ◆ Upload Status (In-Progress, Completed, or Failed)
- ◆ Status (Published or Unpublished)
- ◆ Uploaded on (date/time)
- ◆ Received
- ◆ Loaded



Susan Stoba Test Organization (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe Notifications Incidents Contacts Reports **Settings** Access

Settings ?

Organization Member Portal

Organization

Map

Map Defaults

My Shapes

Display Layers

Point Address Data

Published

**Uploads**

Custom Map

Interactive Visibility

Publishing Options

Notifications

Contacts and Groups

Secure Messaging

**Point Address Data: Uploads**

Refresh Upload to Portal Download Template

File Name	Batch ID	Upload Status	Status	Uploaded on	Received	Loaded
Point_Address_Data_LK1.csv	21998822490119	In Progress	Unpublished	2014-06-03 09:41:12 PDT	0	0
Point_Address_Data_LK1.csv	21998822490118	Completed	Unpublished	2014-06-03 09:32:36 PDT	81	81
Point_Address_Data_LK1.csv	21998822490115	Completed	Unpublished	2014-03-27 14:03:18 PDT	81	81
Point_Address_Data_LK1.csv	21998822490114	Completed	Unpublished	2014-03-27 13:59:01 PDT	81	81
Point_Address_Data_LK1.csv	21998822490113	Completed	Published	2014-03-27 13:28:16 PDT	81	81

Page 1 of 1 10 View 1 - 5 of 5

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Click Refresh to update the status.

Susan Stoba Test Organization (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe Notifications Incidents Contacts Reports **Settings** Access

Settings ?

Organization Member Portal

Organization

Map

Map Defaults

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Point Address Data

Published

**Uploads**

Custom Map

Interactive Visibility

Publishing Options

Notifications

Contacts and Groups

Secure Messaging

**Point Address Data: Uploads**

Refresh Upload to Portal Download Template

File Name	Batch ID	Upload Status	Status	Uploaded on	Received	Loaded
Point_Address_Data_LK1.csv	21998822490119	Completed	Unpublished	2014-06-03 09:41:12 PDT	81	81
Point_Address_Data_LK1.csv	21998822490118	Completed	Unpublished	2014-06-03 09:32:36 PDT	81	81
Point_Address_Data_LK1.csv	21998822490115	Completed	Unpublished	2014-03-27 14:03:18 PDT	81	81
Point_Address_Data_LK1.csv	21998822490114	Completed	Unpublished	2014-03-27 13:59:01 PDT	81	81
Point_Address_Data_LK1.csv	21998822490113	Completed	Published	2014-03-27 13:28:16 PDT	81	81

Page 1 of 1 10 View 1 - 5 of 5

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**NOTE:** This information will not be available for use until you PUBLISH it. You can publish after successfully uploading. To publish, see the procedure *To view the Point Address Data: Uploads Details*, next.

## To view the Point Address Data: Uploads Details

- 1 From the Point Address Data: Uploads page, click the Details icon.

**Point Address Data: Uploads Details**  
Point\_Address\_Data\_LK1.csv

Unpublished Publish

You must Publish these addresses to use them. Only valid addresses will be Published.

Valid(81) Errors(0)

Record ID	Country	Street Address	Apt/Suite/Unit	City	State/Province	Postal Code
8812208	United States	31503 Poudre Canyon Highway	100	Bellvue	CO	80512
8812209	United States	31504 Poudre Canyon Highway	101	Bellvue	CO	80512
8812210	United States	31505 Poudre Canyon Highway	102	Bellvue	CO	80512
8812211	United States	31506 Poudre Canyon Highway	103	Bellvue	CO	80512
8812212	United States	31507 Poudre Canyon Highway	104	Bellvue	CO	80512
8812213	United States	31508 Poudre Canyon Highway	105	Bellvue	CO	80512
8812214	United States	31509 Poudre Canyon Highway	106	Bellvue	CO	80512
8812215	United States	31510 Poudre Canyon Highway	107	Bellvue	CO	80512
8812216	United States	31511 Poudre Canyon Highway	108	Bellvue	CO	80512

Upload Status: Completed  
Total Records: 81  
Publish Date: 2014-06-03 09:41:12 PDT  
Upload Date: 2014-06-03 09:41:12 PDT  
Uploaded By: Lucy Kajimoto

- 1 The application lists the upload results in one of two sub-tabs on the page:
  - The "Valid(#)" tab displays a list of the records that passed all data validations tests.
  - The "Errors(#)" tab displays a list of the records that failed one or more validation tests. You can correct the data values that caused the errors before publishing the upload, or you can correct the data errors in your upload file and upload the corrected file.





## To use the valid addresses in your master list for geo-coding contact addresses

- 1 Click Publish.  
The confirmation dialog is displayed.
- 2 Click Yes.  
Only valid addresses will be published. The “Published” button for the upload is replaced by a “Re-Publish” button.

Susan Stoba Test Organization (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe Notifications Incidents Contacts Reports Settings Access

Settings

Organization Member Portal

Organization

Map

Map Defaults

My Shapes

Display Layers

Point Address Data

Published

Uploads

Custom Map

Interactive Visibility

Publishing Options

Notifications

Contacts and Groups

Secure Messaging

**Point Address Data: Uploads Details**

Point\_Address\_Data\_LK1.csv

Published Re-Publish

You must Publish these addresses to use them. Only valid addresses will be Published.

Valid(81) Errors(0)

Record ID	Country	Street Address	Apt/Suite/Unit	City	State/Province	Postal Code
8812208	United States	31503 Poudre Canyon Highway	100	Bellvue	CO	80512
8812209	United States	31504 Poudre Canyon Highway	101	Bellvue	CO	80512
8812210	United States	31505 Poudre Canyon Highway	102	Bellvue	CO	80512
8812211	United States	31506 Poudre Canyon Highway	103	Bellvue	CO	80512
8812212	United States	31507 Poudre Canyon Highway	104	Bellvue	CO	80512
8812213	United States	31508 Poudre Canyon Highway	105	Bellvue	CO	80512
8812214	United States	31509 Poudre Canyon Highway	106	Bellvue	CO	80512
8812215	United States	31510 Poudre Canyon Highway	107	Bellvue	CO	80512
8812216	United States	31511 Poudre Canyon Highway	108	Bellvue	CO	80512

Upload Status Completed

Total Records 81

Publish Date 2014-06-03 09:43:47 PDT

Upload Date 2014-06-03 09:41:12 PDT

Uploaded By Lucy Kajimoto

- 3 Return to the Point Address Data: Uploads page by clicking Uploads from the navigation pane.



Note the Status is “Published”. Once published, you can Re-Publish as needed.

Susan Stoba Test Organization (Organization Admin) | Welcome Lucy Kaimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe Notifications Incidents Contacts Reports **Settings** Access

Settings ?

Organization Member Portal

Organization

Map

Map Defaults

My Shapes

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**Uploads**

Custom Map

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Publishing Options

Notifications

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Secure Messaging

**Point Address Data: Uploads** ?

Refresh Upload to Portal Download Template

File Name	Batch ID	Upload Status	Status	Uploaded on	Received	Loaded
Point_Address_Data_LK1.csv	21998822490119	Completed	Published	2014-06-03 09:41:12 PDT	81	81
Point_Address_Data_LK1.csv	21998822490118	Completed	Unpublished	2014-06-03 09:32:36 PDT	81	81
Point_Address_Data_LK1.csv	21998822490115	Completed	Unpublished	2014-03-27 14:03:18 PDT	81	81
Point_Address_Data_LK1.csv	21998822490114	Completed	Unpublished	2014-03-27 13:59:01 PDT	81	81
Point_Address_Data_LK1.csv	21998822490113	Completed	Published	2014-03-27 13:28:16 PDT	81	81

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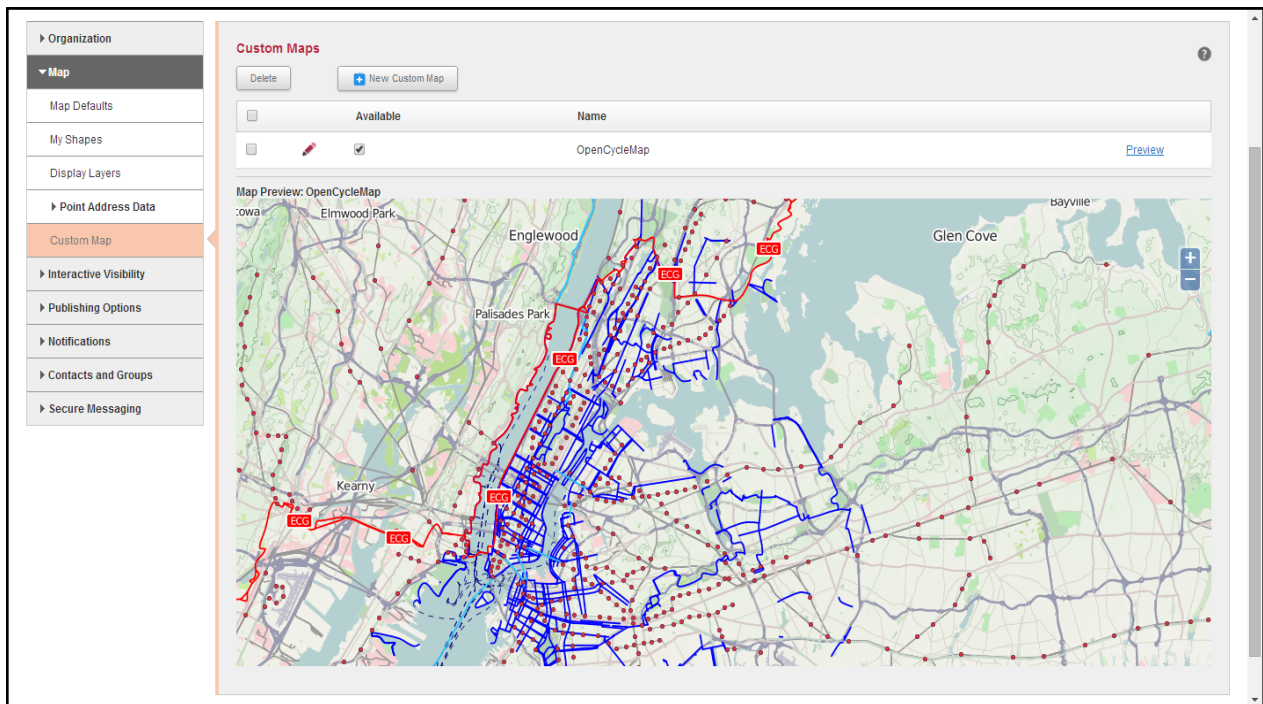
## Custom Map

An administrator can use this feature to integrate map tiles from an Internet-accessible map tile server. This feature will enable an administrator to set a custom map tile server as the default map in the map widget in the Manager Portal.

The following are the system requirements for Custom Maps:

- ◇ Base map (no active layers and no map services)
- ◇ Of type XYZ or ArcGIS
- ◇ Compatible with OpenLayers 2.0 framework
- ◇ Accessible to the public via the Internet
- ◇ Does not require username and password
- ◇ Employs Spherical Mercator projection to ensure map and contacts align in the map widget

**NOTE:** Your custom map must be a base map implemented using Spherical Mercator (EPSG:900913) projection in order for the contact layers and shapes to be displayed correctly; not a layer or layers on top of a base map. If you want to use "layers", then load these into the Display Layers library. For details, see *Display Layers* on page 340.





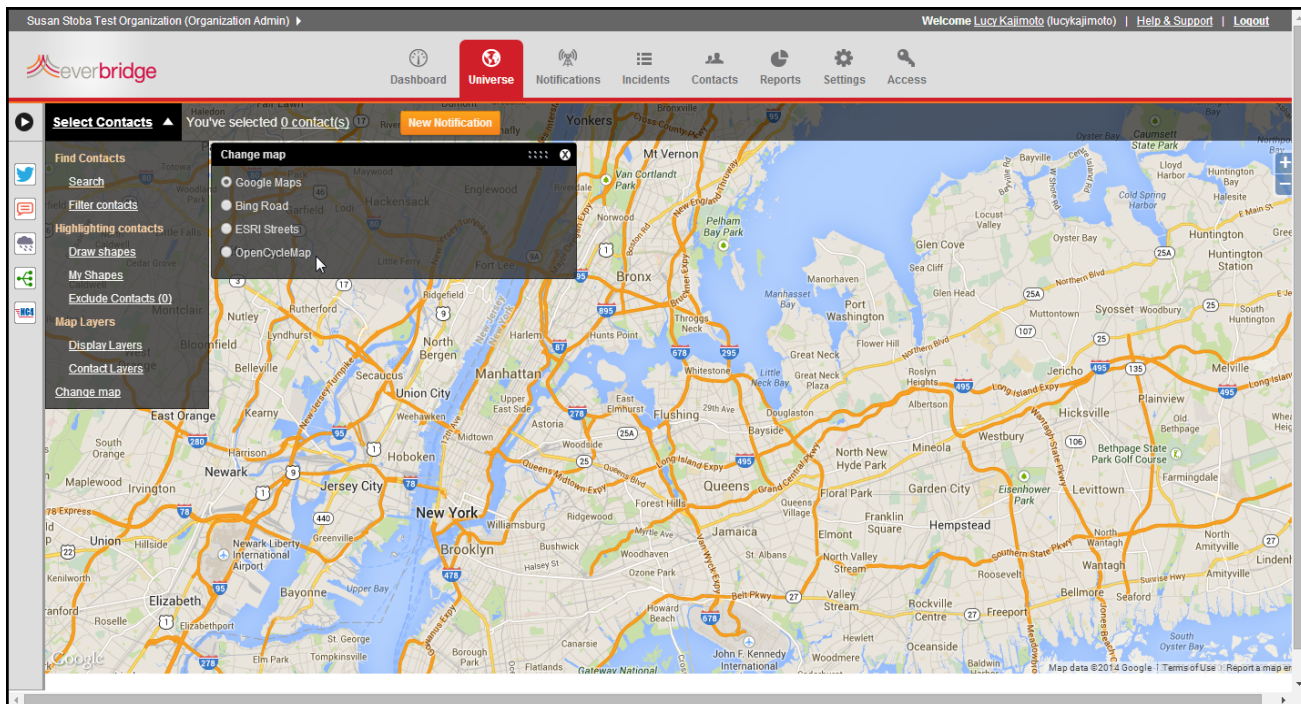
## To add a custom map

- 1 Click the New Custom Map button to add or edit a custom map.

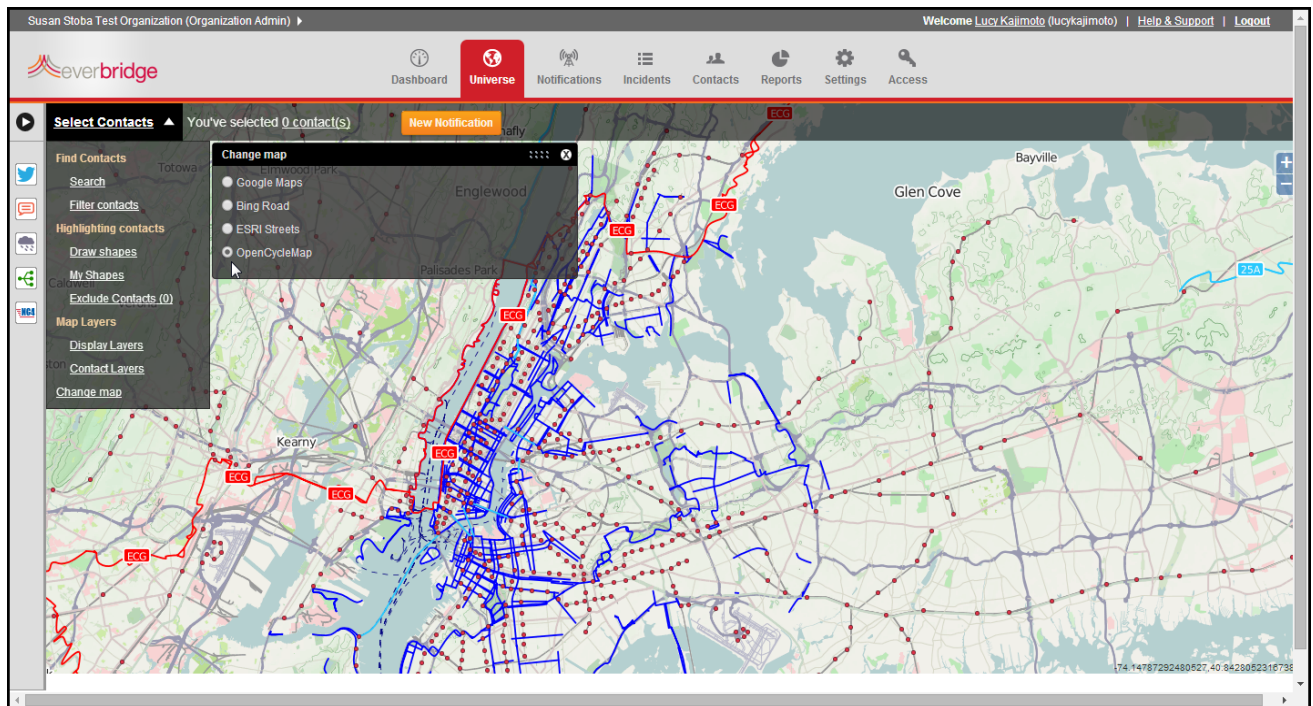
The dialog box titled "Add/Edit Custom Map" contains three fields: "Map Type" with a dropdown menu showing "XYZ", "Name" with an empty text box, and "URL" with an empty text box. At the bottom are "OK" and "Cancel" buttons.

- 2 In the Map Type field, select the corresponding map type.
- 3 In the Name field, type a name for this custom map.
- 4 In the URL field, enter the URL address of the custom map that you want to appear in the list of maps in the Map Defaults page and the map widget in the Manager Portal.
- 5 Click OK.

If the integration of the map is successful, then you should see the map in the preview pane in the lower part of the page. From the Custom Maps page, select the Available check box to make your custom map available on the map widget and the Map Defaults page.



When you select the custom map, from the map options in the map widget, the application displays your map. The users in the map widget can toggle between any of the available maps.





# Publishing Options

Everbridge offers the following Publishing Options. An option is visible here only if it is enabled for your organization.

## Everbridge Network

When configured, the notification will be published to the organizations you have indicated. Optionally, you can use a shape to specify the impacted area to your network.

## Organization Identity

The screenshot displays the Everbridge Settings interface. The top navigation bar includes links for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings (highlighted), and Access. The left sidebar lists various settings categories: Organization, Map, Interactive Visibility, Publishing Options, Everbridge Network, Organization Identity (selected), Subscribe & Publish, CMAS/WEA, Alertus, Web Posting, Notifications, Contacts and Groups, and Secure Messaging. The main content area is titled 'Network Effect - Organization Identity' and contains the following fields:

- Organization Name: Text input field
- Doc: Text input field
- Display of logo: ☐
- Category: Corporate
- Area of Responsibility: ☒ None, ☐ Upload shape, ☐ My Shapes
- Save: Orange button

At the bottom of the page, there is a footer with links for Privacy and Terms of Use, and a copyright notice: © 2014 Everbridge, Inc.



## Subscribe & Publish

The screenshot displays the Everbridge Settings interface. At the top, a navigation bar includes links to Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings (highlighted), and Access. Below this, the 'Settings' page is shown with tabs for 'Organization' and 'Member Portal'. A left sidebar lists various settings categories, with 'Publishing Options' expanded to show 'Everbridge Network', 'Organization Identity', 'Subscribe & Publish' (highlighted), 'CMAS/WEA', 'Alertus', 'Web Posting', 'Notifications', 'Contacts and Groups', and 'Secure Messaging'. The main content area is titled 'Network Effect - Subscribe & Publish Settings'. It contains a 'Select Subscription Options' section with radio buttons for 'Category' (All selected, Only those in specific categories) and 'Geography' (All areas selected, Only my organization's address(es)). Below this is a 'Publishing' section with a message: 'Your notification will be published to participating Everbridge Network organizations who subscribe to the Corporate category.' and a 'Save' button. The footer includes links for Privacy and Terms of Use, and copyright information for 2014 Everbridge, Inc.

everbridge

Dashboard Universe Notifications Incidents Contacts Reports Settings Access

Settings ?

Organization Member Portal

Organization

Map

Interactive Visibility

Publishing Options

Everbridge Network

Organization Identity

Subscribe & Publish

CMAS/WEA

Alertus

Web Posting

Notifications

Contacts and Groups

Secure Messaging

Network Effect - Subscribe & Publish Settings ?

Select Subscription Options

Category

☒ All

☐ Only those in [specific categories](#)

Geography

☒ All areas

☐ Only my organization's address(es)

Publishing

Your notification will be published to participating Everbridge Network organizations who subscribe to the Corporate category.

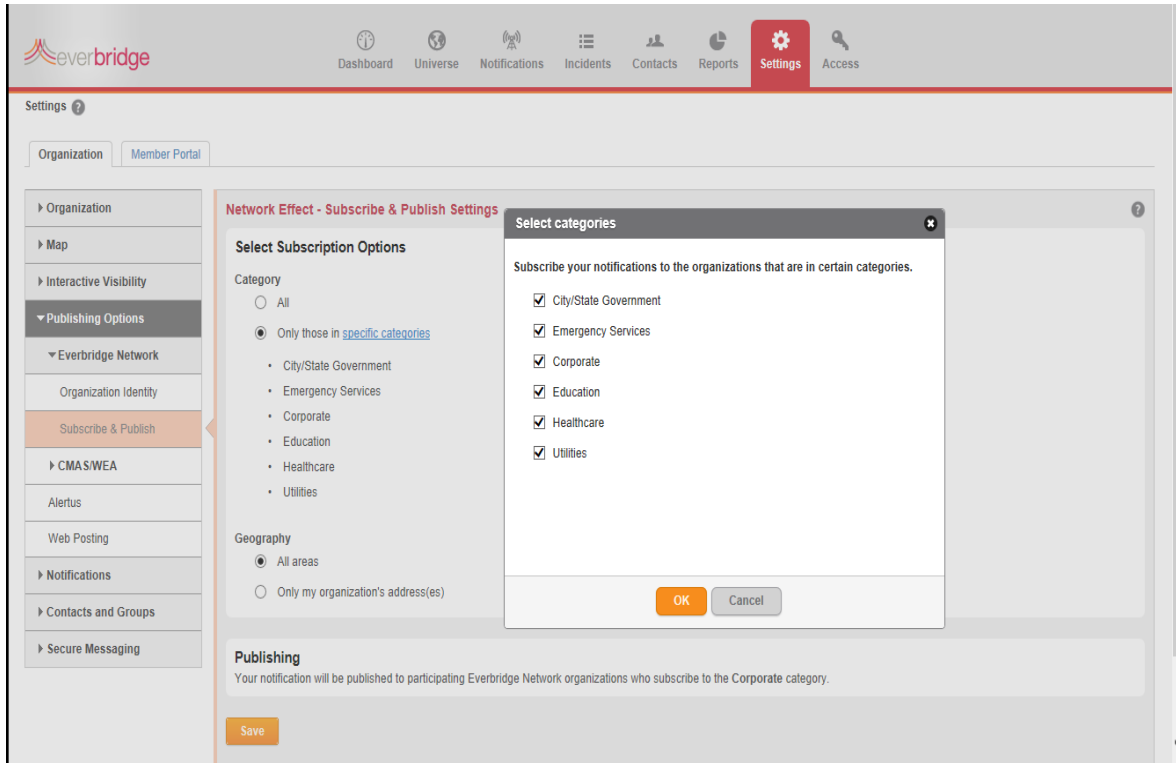
Save

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You can choose specific categories of organizations by selecting the radio button: Only those in specific categories. Next, clicking the [specific categories](#) link launches the Select Categories dialog (see the following example). Select one or more categories and click OK.







In addition, you can configure your network Subscribe & Publish settings. Click Save when you have made changes.

**Settings**

Organization Member Portal

Organization

Map

Interactive Visibility

**Publishing Options**

Everbridge Network

Organization Identity

Subscribe & Publish

CMAS/WEA

Alertus

Web Posting

Notifications

Contacts and Groups

Secure Messaging

**Network Effect - Subscribe & Publish Settings**

**Select Subscription Options**

Category

☐ All

☒ Only those in [specific categories](#)

- City/State Government
- Emergency Services
- Corporate
- Education
- Healthcare
- Utilities

Geography

☐ All areas

☒ Only my organization's address(es)

**Address Information**

\* Location Name: Everbridge, Inc.

\* Country: United States

\* Address: 500 N Brand Blvd

Apt/Suite/Unit: Suite 1000

City: Glendale

State/Province: California

Postal Code: 91203

Select Address: Please input address information for searching your location

\* Longitude: -118.254364013672

\* Latitude: 34.1535453796387

[Find location on map](#)

\* Location Name: Home

\* Country: United States

\* Address: 28717 Woodside Drive

Apt/Suite/Unit:

City: Santa Clarita

State/Province: California

Postal Code: 91390

Select Address: Please input address information for searching your location

\* Longitude: -118.490371704102

\* Latitude: 34.4611968994141

[Find location on map](#)

[Add another address](#)

**Publishing**

Your notification will be published to participating Everbridge Network organizations who subscribe to the Corporate category.

[Save](#)

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## CMAS/WEA

IPAWS (Integrated Public Alert and Warning System) is a planned multi-agency emergency population warning system in the United States, hosted by FEMA.

CMAS (Commercial Mobile Alert System) is the system interface to the WEA (Wireless Emergency Alerts) service that wireless carriers use. CMAS is in partnership between FEMA, the Federal Communications Commission (FCC), and wireless carriers, to enhance public safety.

### Certificate

Everbridge integrates with IPAWS to the WEA system. Everbridge applications use the clients' credentials when it sends messages on behalf of the clients.

The screenshot shows the Everbridge Settings page for the 'Susan Stoba Test Organization (Organization Admin)'. The user is logged in as 'Lucy Kajimoto (lucykajimoto)'. The 'Settings' menu is open, and the 'Certificate' option under 'CMAS/WEA' is selected. The 'Certificate' page displays the following information and fields:

- Organization:** Susan Stoba Test Organization (Organization Admin)
- Member Portal:** [Link]
- Organization Settings:** Organization, Map, Interactive Visibility, Publishing Options, Everbridge Network, CMAS/WEA, Certificate (selected), SAME Codes, Sender Agency Name, CMAS Fields, Alertus, Web Posting, Notifications, Contacts and Groups, Secure Messaging.
- Certificate Section:**
  - Load the non-sensitive credentials provided to your organization by FEMA. Please note that Everbridge employees will not ask you for your CMAS/WEA credentials.**
  - Last Modified Date:** 2014-03-27 17:55:30 PDT
  - Last Modified By:** Lucy Kajimoto
  - Digital Certificate File:** [Browse...]
  - COG ID:** [Text Field]
  - COG Alias:** [Text Field]
  - Save:** [Button]

**NOTE:** When sending to the CMAS\WEA publishing option, you do not select a list of recipients, and the message recipients cannot confirm receipt or reply.

To fill in the fields on this page, type or copy and paste the information from the document provided by FEMA, then click Save.

In the COG Alias field, enter the COG (Collaborative Operating Group) alias. The current format of the COG Alias is "IPAWSOPEN\_{COG\_ID}". You should receive the COG ID in an email from FEMA when you are granted credentials to send messages to IPAWS.



The application converts all fields to read-only format and stores the three entries as one record for the organization. The page displays the audit information: time stamp and full name of the user who last updated the content of this page. This COG “common name” value that FEMA sends in the email to alerting authorities is not currently needed when sending notifications to CMAS\WEA.

An organization can load only one set of IPAWS credentials. If you want multiple agencies to send CMAS messages, and each agency has their own set of credentials, then each agency needs their own organization. You are responsible for maintaining the accuracy of your credentials. The application does not verify the accuracy of the information loaded on this page.

To update, you must remove all credentials in order to edit any component. Click Remove All. Confirm the deletion and the values are purged. Enter your update information and click Save.

You must load these non-sensitive credentials before attempting to send a notification to CMAS/WEA from within Everbridge Suite.



## SAME Codes

The SAME Code (Specific Area Message Encoding code) is a NOAA-provided code that extends the 5-digit FIPS code to 6-digits by enabling the first digit (left-most) to be used to identify a sub-geographical area in a county. The SAME code value must be 6-digits; for example, 006037. The current list of SAME codes is available at:

<http://www.nws.noaa.gov/nwr/indexnw.htm#sametable>

An organization that uses CMAS must include at least one SAME code. Only agencies with permission to send messages to more than one county in a state will have more than one value in the list. If the list is populated with more than one SAME code, the administrator can sort the list as desired.

The screenshot shows the 'Settings' page with the 'Organization' tab selected. The left sidebar lists various settings, with 'SAME Codes' highlighted. The main area shows a table with columns 'Sequence', 'Code', and 'Description'. The 'Code' field has a placeholder 'Must be 6 digits' and the 'Description' field has a placeholder 'Maximum 30 characters'. An 'Add' button is visible.

The SAME code field will be used in the message sent to IPAWS. The Geographical Description enables the administrator to set a label for each code to assist other administrators with troubleshooting.

Enter the SAME Code and its description. then click Add for each individual entry. If there are multiple SAME codes, the administrator can click the up or down arrows to re-sequence the list.



## Sender Agency Name

Administrators can enter one or more Sender Agency names. Type the Sender Agency Name and click Add. If there are multiple Sender Agency names, the administrator can click the up or down arrows to resequence the list.

The screenshot shows the 'Settings' page with the 'Organization' tab selected. The left sidebar contains a list of settings categories: Organization, Map, Interactive Visibility, Publishing Options (selected), Everbridge Network, CMAS/WEA, Certificate, SAME Codes, Sender Agency Name (highlighted), CMAS Fields, Alertus, Web Posting, Notifications, Contacts and Groups, and Secure Messaging. The main content area is titled 'Sender Agency Name' and features a table with two columns: 'Sequence' and 'Sender Agency Name'. The first row shows '1' in the Sequence column and 'Sheriff's Dept' in the Sender Agency Name column. Below the table is a text input field with a placeholder 'Maximum 30 characters' and an 'Add' button. The footer of the page includes links for 'Privacy' and 'Terms of Use', and a copyright notice for '© 2014 Everbridge, Inc.'.

Sequence	Sender Agency Name
1	Sheriff's Dept

Maximum 30 characters

[Add](#)



## CMAS Fields

The administrator can hide fields on the CMAS form, as needed. Initially, all fields are exposed to the user on the notification form.

Field Name	Expose	Default Value
Sender Agency Name	<input checked="" type="checkbox"/>	Sheriff's Dept
Urgency	<input checked="" type="checkbox"/>	Immediate
Severity	<input checked="" type="checkbox"/>	Extreme
Certainty	<input checked="" type="checkbox"/>	Observed
Expires in	<input checked="" type="checkbox"/>	1
Affected Region SAME code(s)	<input checked="" type="checkbox"/>	

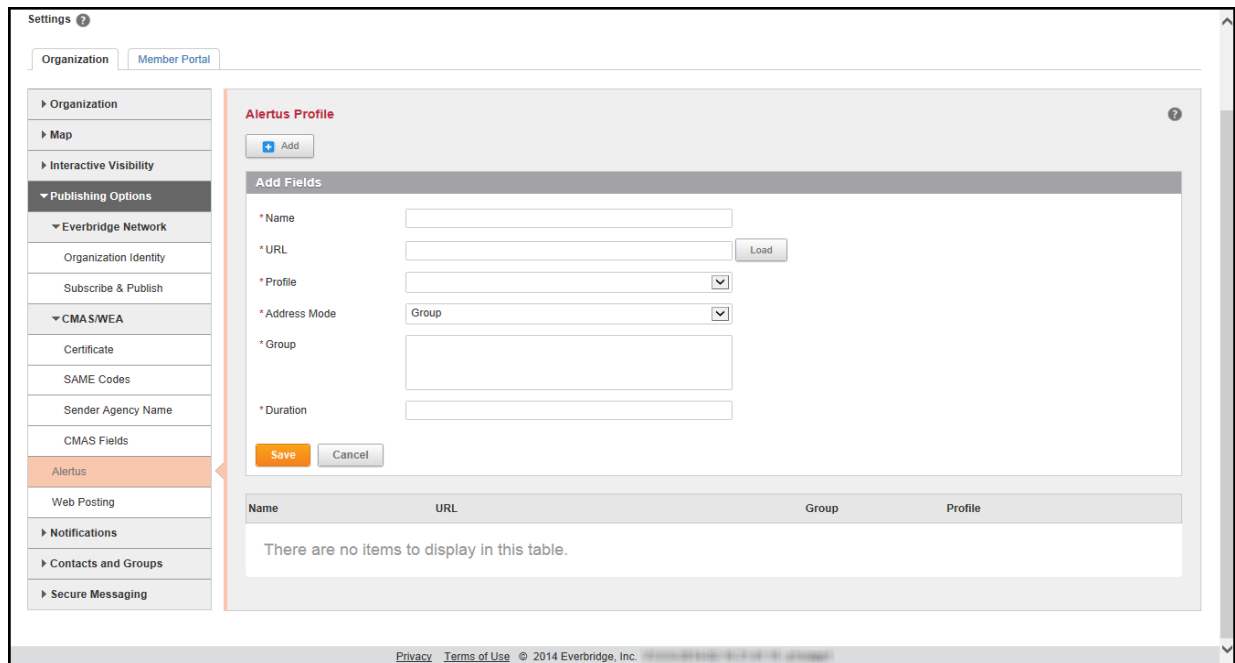
Save

Clear the corresponding check box to hide a field. In addition, the administrator can optionally select the Default Values for each field. This eliminates the probability of the user entering incorrect values on the user form.

# Alertus

The Alertus Profile provides a way for personnel to relay important emergency alerts through Alertus, an Everbridge Partner providing desktop alerts, alert beacons, and digital signage.

Click Add. The Add Fields pane is displayed. All fields are required. Click Save when you have added the Alertus Profile.



The screenshot shows the 'Settings' page with the 'Alertus' option selected in the left-hand navigation menu. The main content area is titled 'Alertus Profile' and contains an 'Add' button. Below this is the 'Add Fields' section, which includes the following required fields:

- \* Name: Text input field
- \* URL: Text input field with a 'Load' button
- \* Profile: Dropdown menu
- \* Address Mode: Dropdown menu (currently set to 'Group')
- \* Group: Text input field
- \* Duration: Text input field

At the bottom of the 'Add Fields' section are 'Save' and 'Cancel' buttons. Below this is a table with the following headers: Name, URL, Group, and Profile. The table is currently empty, displaying the message: 'There are no items to display in this table.'

At the bottom of the page, there is a footer with links for 'Privacy' and 'Terms of Use', and a copyright notice: '© 2014 Everbridge, Inc.'



## Web Posting

To initiate notifications to partner systems or client-side web sites, you can provide one or more URLs. As needed, provide a corresponding username and password for each URL. When sending your notifications, you can select Web Posting as a publishing option and then select the check box for the specific URLs.

**Web Posting Settings**

[Add](#)

**Add Fields**

\* URL  [Test](#)

\* Display Name

Username

Password

[Save](#) [Cancel](#)

URL	Display Name	Username	Password	
https://www.socialtunnel.net/send/all?by=everbridge	All		*****	<a href="#">Edit</a> <a href="#">Delete</a>
https://www.socialtunnel.net/send/facebook?by=everbridge	Facebook Only		*****	<a href="#">Edit</a> <a href="#">Delete</a>
https://www.socialtunnel.net/send/twitter?by=everbridge	Twitter Only		*****	<a href="#">Edit</a> <a href="#">Delete</a>

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**NOTE:** Since each implementation is unique, it is recommended that you work with your IT department to ensure proper configuration of the Web Posting feature.

## Customer Web Service Requirements

The Customer Web Service receives the HTTP POST notification from the Everbridge system.

In order to set up the Customer Web Service to receive Everbridge notifications, the web service must meet the following requirements:

- 1 The web service must exist and be reachable from the Internet.
- 2 The web service endpoint must accept an HTTP POST of content type "application/json" with a JSON encoded body.
- 3 The web service may use HTTP Basic Authentication.
- 4 The web service may use SSL/HTTPS.





- 5 The web service must respond with a valid HTTP status code as an acknowledgment for successful or unsuccessful receipt of the Notification.

**NOTE:** Response codes returned by external web services are logged by Everbridge for troubleshooting purposes. They are not currently reflected in the Notification reports in the Everbridge Notification Reports through the Manager Portal.

## Everbridge Notification Format

An Everbridge notification sent to the web service endpoint will be JSON-encoded and will have the properties shown in the following sample message.

```
{"title" : "Notification Title", "body" : "Notification Body", "fileAttachments" : ""}
```

**NOTE:** *fileAttachments* will not yet produce the Notification Attachment. This functionality is coming soon.

JSON parsers are available for most programming languages. Your web service endpoint should parse the above message. After parsing the message, you can perform whatever logic you desire using the properties of the message.

## Everbridge Configuration

Once the web service endpoint is working as discussed, you can configure the service in your Everbridge settings.

- 1 Select Organization >Publishing Options >Web Posting in the Everbridge web interface.
- 2 Click Add on the right-hand side under Web Posting Settings.
- 3 Input the following values:
  - a URL: The URL to which you want to POST an Everbridge Notification.

**NOTE:** The URL must be accessible by the Internet.

- b Display Name: The name this URL POST should have in the Everbridge UI when creating a Notification.
  - c Username: IF the URL requires HTTP BASIC Authentication, the username for the URL.
  - d Password: IF the URL requires HTTP BASIC Authentication, the password for the URL.
- 4 Click Save.

Having followed these steps, you will see the value you set in "Display Name" when you select the "Web Posting" check box during notification creation. Selecting the option will send a message to your web service.



## Stopping or Expiring a Web Posting Notification

Customers using the Web Posting Notification feature currently have two options to stop or expire a Notification:

- ◇ Develop logic on the Customer Web Service to remove or replace a Notification based on your own business requirements (for example, elapsed time, updated HTTP POST, and so forth).
- ◇ Develop a web service call to Everbridge's REST API for Notification Configuration element in order to determine if the Notification Title is listed as an active notification. This call can be executed at an interval of your choosing, but not recommended at less than 5 minutes from the time of receipt of the original HTTP POST.



# Notifications

The Notifications settings allow you to directly configure many default options within the Everbridge Suite system. It provides immediate access to the Organization settings so that you can adjust them specifically to your organization's preferences.

## Default Options

Enter your default options and click Save when you are done. When you are sending a notification, you can change these settings if needed. Configuring the most commonly used settings as the default options reduces the chances of human error while sending the notification.

- ◆ Notification Language—From the drop-down list, select the desired default language. The Notification Language uses system prompts and messages in that language. It also chooses the correct text-to-speech engine if you need to convert the text for a voice path. (The language setting does not translate the text. You must enter the text in the correct language.)
- ◆ Confirmation Requested—Select the desired radio button: Yes or No. This controls whether the message will contain a method for the contacts to confirm that they have received the message. Sending a message is not sufficient; you need to know that your contacts have actually received the message. For example, in an email message, there is a link for the users to confirm receipt of the message. In a voice message, users are



prompted to press a key. The Broadcast Results show you how many contacts confirmed and who they were. In most notifications, you will want to select Yes as the default.

- ◇ Voice Mail Preference—Select the desired radio button: No Message, Message Only, or Message with Confirmation. This controls what happens when the message is sent to voice mail. You can select whether to end the call (No Message), leave a message (Message Only), or leave a message with confirmation (Message with Confirmation).
- ◇ Broadcast Cycles—Type the number of cycles you want your notifications to be repeated. Enter a Maximum number that the notification sender can use and a Default number setting the default value for sending the notification. Broadcast Cycles controls how many times the notification will attempt to deliver the message across all of the device types for each contact. For example, if a contact has four device types and the Broadcast Cycles is set to 2, the system tries all devices twice.
- ◇ Broadcast Duration—Type the number of hours for notifications. This controls how long the notification is open to send messages and receive confirmations. Make sure that the duration is long enough to send all of the messages. If you have a large number of contacts to whom to send messages and the duration is too short, the notification might not go to all contacts. The Broadcast Duration also controls the confirmation status. If the contacts confirmed during the broadcast duration, they are counted as *confirmed*. If they confirmed after the broadcast duration, they are counted as *confirmed late*.
- ◇ Interval Between Cycles—Select the number of minutes between notification cycles from the drop-down list. This controls how long the system waits before trying the next cycle. If you leave the number at 0 (zero), the next cycle begins immediately.
- ◇ Interval Between Delivery Methods—Select the number of minutes from the drop-down list. This controls how long the system waits before moving on to the next delivery method for a contact. For example, if the contact has four delivery methods, this is the number that the system waits between delivery methods. If the contact confirms, the system does not need to send the message to any additional devices. The default interval is 0 (zero), so the system tries all devices as quickly as possible.
- ◇ Delivery Order—From the drop-down list, select the desired delivery order. Choices are as follows:
  - Organization Default—The order specified in Settings > Organization at the Organization level.
  - Account Default—The order specified in Settings > Organization at the Account level.
  - Contact Preferred—If you have enabled it, members can change the delivery order in the Member Portal. This sends using their customized delivery order, but will use the Organization Default otherwise.
  - One-Time Custom—This overrides all other delivery orders for this single notification.
- ◇ Notification Escalations—Select the desired check box or check boxes to enable Notification Escalations for Incident Management and/or Everbridge Suite.



- ◇ Allow Separate Email Content—Select the desired radio button: Yes or No. This feature controls whether notifications from your Everbridge Organization can contain a separate message for email notifications. If you select “Yes,” then all authorized users can include a separate message formatted for email notifications. Users will be able to also use a separate plain text message for SMS text, fax, pagers, and text-to-speech.
- ◇ Mobile Member—Message Sharing: Select the check box to allow your contacts to share messages with their extended network and default notification sharing.

## Sender Information

You can define, globally and by country, the Caller ID that Everbridge will use when deploying notifications to target recipients in international locations. This allows you to obtain better confirmation rates for international participants. You can specify whether these settings are alterable when a notification is sent. Click Save after configuring your Sender Information.

The screenshot shows the Everbridge Settings interface. The top navigation bar includes icons for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings (active), and Access. The left sidebar lists various settings categories: Organization, Map, Interactive Visibility, Publishing Options, Notifications (selected), Default Options, Sender Information (highlighted), Delivery Methods, Broadcast Throttling, Conference Bridges, Phone - Voice Greeting, Email - Header & Footer, Contacts and Groups, and Secure Messaging. The main content area is titled 'Sender Information' and contains the following fields:

- Sender E-Mail Display:** rod.lemmon@gmail.com (with an Edit link)
- Sender Caller ID:** A table with columns 'Default' and 'Country'. The 'Default' row shows 'United States' and '8185001258'. Below this is a 'Select Country' dropdown and an 'Add' button.
- Permission:** A checkbox labeled 'Allow notification sender to edit sender email and sender caller ID'.
- Save:** An orange button at the bottom.

At the bottom of the page, there is a footer with links for Privacy and Terms of Use, and a copyright notice for © 2014 Everbridge, Inc.

- ◇ Sender E-mail Display—You can set an address that is used for email notifications. The Sender Email Address is used as the “From” address when the message is sent by email. To change the address, click Edit, type the new address, and click Save.
- ◇ Sender Caller ID—You can set the Caller ID for notifications so that the recipient sees a familiar number.
  - Default—If you add more than one Caller ID, choose which one will be the default Caller ID. If a call is placed to a country that does not have a Caller ID configured, the default Caller ID is displayed.



- **Country**—To add a Caller ID, select the country where this will be the number displayed. Then, type the number and click Add.
- **Caller ID**—The Caller ID is displayed to the recipient on voice calls. You can configure more than one Caller ID and the system will use the appropriate one for a notification. That is, when calls are placed to numbers in the specific country, that country's number is displayed as the Caller ID.

If you are sending the message to another country, using a local Caller ID can increase the response and confirmation rate to the notification. In other words, if the call displays a familiar ID, the rate of responses from recipients is much higher.

**NOTE:** To add a Satellite phone to your delivery methods, in Settings > Notifications > Sender Information, use the Country: Inmarsat (Ships At Sea). The system starts the number with an "8" so you do not need to add it to the dialing string. For example, if the complete phone number is "881231234," enter "81231234". The system does a look-up for the Inmarsat country and adds the additional "8" to the beginning of the string.

Click the Pencil icon in the row of the Caller ID you want to edit. Click the Trash Bin in the row of the Caller ID you want to delete.

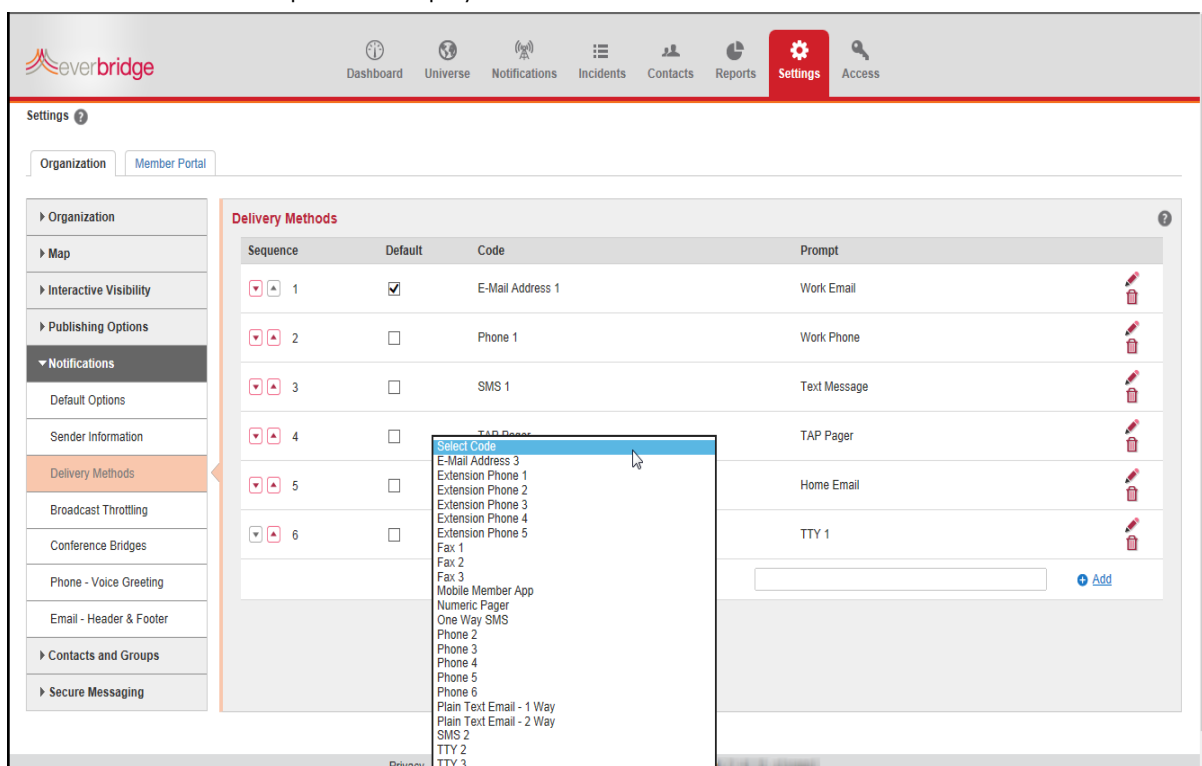
- ◇ **Permission**—Select the check box if you want the notification sender to edit the sender information.

## Delivery Methods

You can configure the delivery methods available in the Everbridge Suite system. You can view the various delivery methods (path codes) by selecting them from the drop-down list. Selecting the path codes your organization prefers, including selecting the Default check box



for each path code, reduces the number of options to select to launch a message and can help reduce human error. That is, the notification initiator does not have to select as many options for deployment.



You can:

- ♦ Add new delivery methods to the list and set the prompt. When you add a prompt to a selected method, the prompt is displayed to the contact. There are a number of path codes from which you can choose. The different path codes will prompt you for different types of input when you add a contact. For example, choosing:
  - E-Mail Address provides a text box to type an SMTP address (username@domain.com). An example prompt might be a Business Email or a Personal Email address.
    - The contact confirms by clicking the link: “Please click here to acknowledge receipt of this message.”
  - Phone allows you to type a phone number. An example prompt might be Business Phone or Home Phone. Type the digits with or without the hyphens and/or brackets. (For international phone numbers, provide the Country Code + City Code + number.)
    - Phone—The contact confirms a phone delivery method by pressing a key requested at the end of the message.



- Fax—The contacts confirm a fax delivery method by calling the phone number provided on the fax, entering their contact ID and password, then typing the PIN provided on the fax.

**NOTE:** When you edit a Phone delivery method, you can change the prompt. You can also click the Advanced link to specify the wait time for the notification recipient to press “1”.

- Extension phone has a text box for a phone number and one for an extension number.
- SMS device has a text box for a phone number. An example prompt might be Text Message. Type the digits with or without the hyphens and/or brackets.
  - The contacts confirm an SMS device delivery method by using the device’s “Reply-to” option.
- Numeric Pager device allows you to type a pager number. Type the digits with or without the hyphens and/or brackets.
- TTY device has a text box for a phone number.

**NOTE:** The Everbridge Mobile Member App runs on iPhones, iPads, and Android Smart Phones and tablets. It is fully integrated with the Everbridge Suite and turns notifications into two-way communication. This enables end recipients to become the “eyes and ears” of the organization during a crisis by responding to surveys, supplying additional information, and sharing their locations and real-time images from the scene.

- ◇ Move delivery methods in the list using the Up and Down arrows located on the left-hand side of each path code. When you send a notification, the default methods are already selected for you as delivery methods for that notification. The notification sender can change the methods for the notification, but setting the defaults for the most common delivery methods helps to eliminate mistakes. You can edit a method by clicking the Pencil icon in the desired row. After making changes, click the Save icon to keep your changes or the Cancel icon if you do not want to keep your changes. You can delete a method by clicking the Trash Bin in the desired row. Confirm the deletion. (Be careful that this delivery method has not been used in a template or recurring notification.)

## Broadcast Throttling

You can customize rules that apply to all notifications, are required on all notifications, and/or show the rules to the notification initiator. When you have configured the throttling rules and preferences, click Save.

You can define, globally and by country, custom throttling rules based on any desired dialing pattern. For example, you can slow the rate of making calls to match what the receiving system can handle.

When you start a notification, Everbridge will try to deliver the message as quickly as possible. If you are sending phone calls, it is possible that the system receiving the calls will not be able to keep up. For example, a notification might place 200 calls to an office location





with a PBX phone system. If the PBX can only handle 125 calls at a time, then 75 calls are dropped. The Everbridge notification moves on to the next contact method for those 75 contacts.

Using Broadcast Throttling slows down the rate of making calls to match what the receiving system can handle. It slows the rate of the notification, but does not overwhelm the phone system causing dropped calls. For example, if the PBX can handle only 125 calls, we might set the maximum notification calls to 100. In this case, the notification is sent to the first 100 calls, not the entire 200. It will not send another call until one of the first 100 has ended.

A call ends when:

- ◆ The contact hangs up after hearing the message.
- ◆ The contact hangs up without listening to the message.
- ◆ The call is dropped or recognized as not delivered.

To control the number of calls, set up rules to control the call flow based on the dialed number. For example, the PBX at the Glendale office might only be able to handle 150 calls at a time, so set the maximum simultaneous calls to 125. All calls going to this location begin with 818-230. add a rule that looks for numbers that start with "818230" and limits them to 125 simultaneous calls.

You can have different rules for different locations. You can also have a default limit for calls that do not match any of the rules.

**Broadcast Throttling**

**Preferences**  
Any change made to preferences will not be applied to already initiated notifications. (scheduled or template)

☐ Apply to all notifications  
☐ Require on all notifications  
☐ Show rules to notification initiator

**Save**

**Throttling Rules**  
Throttling rule change will apply to all notifications

Maximum number of active simultaneous calls that are not defined by the rules below **No limit** [Edit](#)

Rule Name	Country	Throttling Pattern	Max Simultaneous Calls
<input type="text"/>	Select Country	<input type="text"/>	<input type="text"/> <a href="#">Add</a>



To define a rule, start by giving it a Rule Name. Then select the country in which the dialed numbers are located. Type the Throttling Pattern for this rule. If the phone number to be dialed for the contact matches this pattern, the rule will be used. Using the example above, the Throttling Pattern would be 818230 and the Max Simultaneous Calls 125. Click Add. Repeat this process for any additional rules. When done, click Save.

Click the Pencil icon to edit a rule. Make your changes and click the Save icon. Or, click the Cancel icon to keep the original values. Click the Trash Bin to delete a rule. Confirm the deletion.

You can set a maximum to be used if the dialed number does not match any of the rules. By default, there is no limit to the number of simultaneous calls if a throttling rule is not matched. To set a maximum number of calls, click Edit. Type the maximum number of calls in the text box and click Save.

When you make changes to throttling rules, the new values are used the next time a notification is sent, including any notification templates and scheduled messages.

In the Preferences section of Broadcast Throttling, you can configure how the throttling rules are to be used in a notification.

- ◇ If all the check boxes are clear, then the throttling rules are not applied by default, but the notification sender can turn them on by selecting the check boxes.
- ◇ If the check box: Apply to all notifications is selected, but the check box: Require on all notifications is clear, then the throttling rules are applied by default; however, the notification sender can turn them off by clearing the check box.
- ◇ If the check box: Require on all notifications is selected, then the throttling rules are applied by default and the notification sender cannot turn them off.
- ◇ If the check box: Show rules to notification initiator is selected, then the notification sender can view the rules by clicking View Rules.

When you make changes to preferences, they apply to new notifications. They will not affect any templates or scheduled messages you have already configured.

## Conference Bridges

You can customize the conference bridges associated with the Everbridge Suite system. If you are sending a conference notification, you will have a choice of default conference bridges (by default, Everbridge includes four conference bridges for your use) or bridges that are custom to your organization. If the selected Contacts exceed 96, the first 96 contacts will be reached.

**NOTE:** The Organization's Settings tab offers Conference Bridges. The Account's Settings tab does not offer Conference Bridges.



The screenshot shows the Everbridge Settings interface. The left sidebar contains a navigation menu with options like Organization, Map, Interactive Visibility, Publishing Options, Notifications, Default Options, Sender Information, Delivery Methods, Broadcast Throttling, Conference Bridges, Phone - Voice Greeting, Email - Header & Footer, Contacts and Groups, and Secure Messaging. The main content area is titled 'Conference Bridges' and contains a table with the following data:

Bridge Name	Country	Conference Number	Conference Access Code	Last Modified By	Last Modified Date
Everbridge Conference Bridge 1	United States	7124321574	1963152		
Everbridge Conference Bridge 2	United States	7124321574	1963162		
Everbridge Conference Bridge 3	United States	7124321574	1963172		
Everbridge Conference Bridge 4	United States	7124321574	1963182		

Below the table, there is a 'Select Country' dropdown menu, a 'Wizard' button, and an 'Add' button. A modal window titled 'Help me to create an access code string' is open, showing the 'Conference Wizard' and 'Access Code Steps' sections. The wizard includes fields for 'Wait for seconds' (set to 1), 'Dial # or 0-9' (set to 0), and 'Access Code (A)', each with a '>>' button. The 'Access Code Steps' section is empty. The modal also has 'OK' and 'Cancel' buttons.

To add a custom bridge for your organization, start by entering a name for the bridge. This is the name that the notification senders see when they are selecting the bridge for a notification. You can select the country where this number is located so the Everbridge system knows how to dial it, and enter the dial-in number of the conference bridge.

Then, use the Wizard to define the dialing string to successfully connect to the bridge. Often, entering an access code for a conference bridge requires more than just the code. You might need to pause before dialing or use special keys such as the pound/hash (#) key. The Wizard helps you to build the string you need. Enter your information in the Conference Wizard, and click the >> key next to those fields to move the steps to the Access Code Steps. For example, to wait 5 seconds for a prompt, from the Wait for seconds drop-down list, select 5, and click >>. It becomes step 1: Wait for 5 second(s) appears. Next, type your Access Code in the text box and click >>. It becomes step 2: Dial access code 391739. Your access code requires a hash key after it. From the Dial # or 0-9 drop-down list, select # and click >>. It becomes step 3: Dial #. The Wizard now has the steps to build a dialing string to meet the requirements of your bridge.

You can change the order of the steps by selecting a step and pressing the Up or Down arrows. Click the Trash Bin to delete a step. When the access code string is configured, click OK. Finally, click Add in the row of the custom bridge you just added.

When you send a conference notification, your bridge is available. You cannot edit the Everbridge conferences bridges. To edit a bridge added by your organization, click the Pencil icon. Change the name or conference number by typing in the text boxes. Change the access



code dialing by clicking the number, then making changes in the Wizard. Click OK to save the changes to the Wizard. Then click the Save icon. Or click the Cancel icon to keep the old values.

To remove a bridge that you have added, click the Trash Bin in its row. You can delete a default bridge if you do not want your notification senders to have it available. Confirm the deletion.

## Phone - Voice Greeting

You can customize the Greetings associated with voice calls from the Everbridge Suite system. When a message is sent over voice paths, the contacts hear a greeting before the actual message starts. You can use the system default greeting, but it can be more effective if the greeting comes from a name or voice that is familiar in your organization. You can use your own recorded greeting files instead of the system defaults.

**NOTE:** The Organization's Settings tab offers a Phone - Voice Greeting. The Account's Settings tab does not offer the Greetings Library.

The screenshot shows the Everbridge Suite interface. At the top is a navigation bar with icons for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings (highlighted in red), and Access. Below the navigation bar is a 'Settings' section with tabs for 'Organization' and 'Member Portal'. On the left is a sidebar menu with categories: Organization, Map, Interactive Visibility, Publishing Options, Notifications (expanded), Default Options, Sender Information, Delivery Methods, Broadcast Throttling, Conference Bridges, Phone - Voice Greeting (highlighted), Email - Header & Footer, Contacts and Groups, and Secure Messaging. The main content area is titled 'Phone - Voice Greeting' and contains two sections: 'Non-Priority Greeting' and 'Priority Greeting'. Each section has a 'Default message' radio button (selected) and a 'Custom message' section with three options: 'Use Everbridge recorder', 'Use a telephone', and 'Upload a file'. A 'Save' button is located at the bottom left of the main content area.

The Phone - Voice Greeting allows you to have separate greetings for non-priority and priority messages. You can record your greeting directly into the Greetings Library using the online recorder. When you are ready to start, click the Record button (green circle). It is a good idea to wait for a second or two before you start talking to make sure you do not cut off the beginning of your greeting. It is also a good idea to wait for a second or two before you stop recording. To stop recording, click the Record button again. If the Camera and Microphone Access dialog appears, click Allow.



Or, you can prerecord the audio file and upload it. An uploaded voice file must be 8KHz, 8-bit, mono audio WAV format and less than 5-minutes in length.

Click Save when you have set a greeting. At any time, you can use the default greeting by selecting the radio button: Use default greeting under either Greeting Message (Non-Priority or Priority).

The system uses the default greetings unless you install custom recordings.

## Email - Header & Footer

You can customize the Email Header and/or Footer that is displayed with the email-based notification deployments. When a message is sent by email, the header and footer are automatically added to it. The header and footer should contain information that belongs with every message, and not be message-specific.

**NOTE:** The Organization's Settings tab offers Email - Header & Footer. The Account's Settings tab does not offer Email - Header & Footer

The screenshot shows the Everbridge Settings interface. The top navigation bar includes links for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings (highlighted), and Access. The left sidebar lists various settings categories: Organization, Map, Interactive Visibility, Publishing Options, Notifications (expanded), Default Options, Sender Information, Delivery Methods, Broadcast Throttling, Conference Bridges, Phone - Voice Greeting, Email - Header & Footer (selected), Contacts and Groups, and Secure Messaging. The main content area is titled 'Email - Header & Footer' and contains two text input fields. The first field is for the 'Email - Header' and the second is for the 'Email - Footer'. Both fields have a rich text editor toolbar above them and a character count of 'Characters remaining: 300'. A 'Save' button is located at the bottom of the form.

You can add a header, a footer, or both. You can use up to 300 characters in each default header and footer. Type the text in the box, as desired. After typing the custom header/footer, click Save.



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# Contacts and Groups

At the Organization level, all Contacts and Groups are offered. At the Account level, only Security is offered under Contacts. See *Secure FTP* on page 385.

## Contact Record Types

**NOTE:** The Organization's Settings tab offers Contact Record Types. The Account's Settings tab does not offer Contact Record Types.

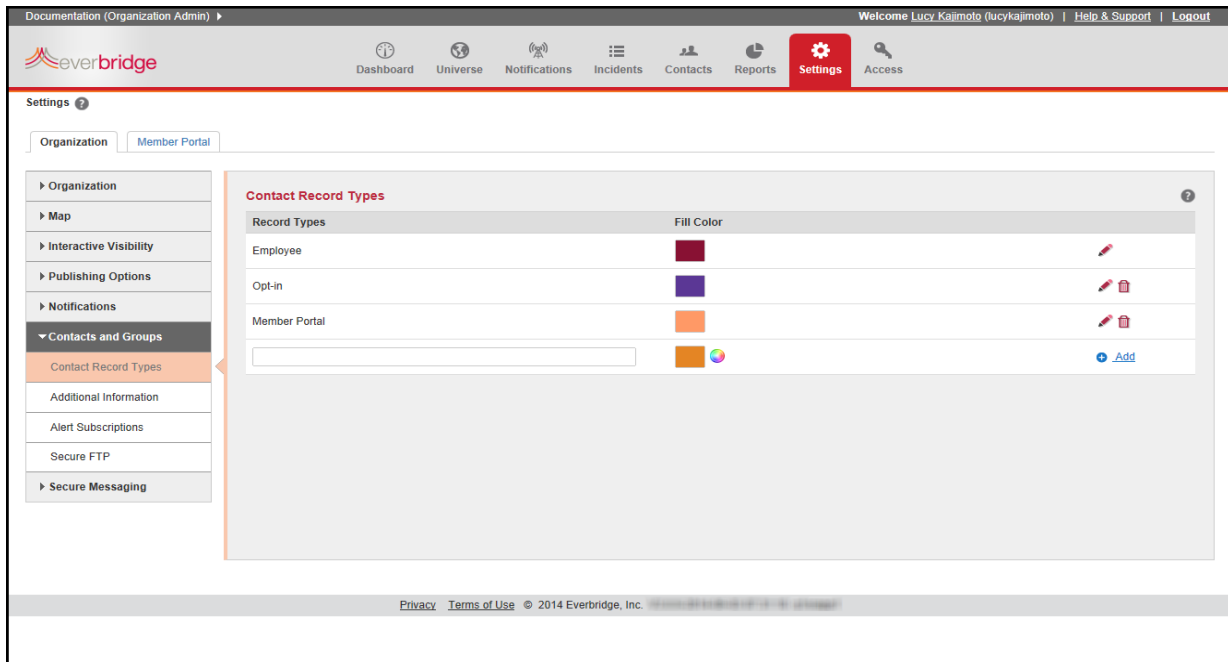
You can define various Contact Record Types that are available when adding members to the system. Typically, you would do this to filter your target population or to segment different types of contacts from others.

**NOTE:** Since the Record Type field is required in the contact record, make sure to define the Contact Record Types before you add any Contacts to your system.

The system has one record type configured that cannot be deleted. The default value for this record type is *Employee*. If *Employee* is not a record type that your organization needs, you can edit it to change it to a name you want to use.

Some example record types include:

- ◇ Employee
- ◇ Contractor
- ◇ Vendor
- ◇ Visitor
- ◇ Partner
- ◇ Internal Personnel
- ◇ Citizen
- ◇ Doctor or Physician
- ◇ Nurse
- ◇ General Staff
- ◇ Faculty
- ◇ Professor or Teacher
- ◇ Student
- ◇ Parent



Names of the record types you use are custom to your organization. Add names that are meaningful to your organization and how you want to classify your contacts. The following are some examples:

- ◇ Government—Employee and Citizen
- ◇ Education—General Staff, Faculty, Student, Parent, Alumni
- ◇ Health Care—General Staff, Physician, Nurse

To add a contact record type, type a name in the text box and click Add. To edit the name of a record type, click the Pencil icon in its row. Make any changes to the name, then click the Save icon. Click the Cancel icon to leave the record type unchanged. To delete a record type, click the Trash Bin in its row. Confirm the deletion.

Once defined in the organization, the record types can be used to:

- ◇ Search and manage contact records based on Record Type
- ◇ Filter the target audience of any notification
- ◇ Filter search results and reporting results based on Record Type



## Additional Information

**NOTE:** The Organization's Settings tab offers Additional Information. The Account's Settings tab does not offer Additional Information.

You can define custom data fields for use in the Everbridge Suite system. Additional Information fields are added to the Contact record that are important to you. These could be:

- ♦ The location where an employee works
- ♦ The title or department of an employee
- ♦ A particular skill or certification someone has

You can use Additional Information fields to manage your contacts. You can also use Additional Information to select contacts for notifications.

Click Add and the Add Fields pane is displayed. The bottom pane shows the existing Additional Information.

The screenshot shows the 'Additional Information' settings page in the Everbridge Organization Admin interface. The page is divided into a sidebar on the left and a main content area. The sidebar contains a list of settings categories: Organization, Map, Interactive Visibility, Publishing Options, Notifications, Contacts and Groups, Contact Record Types, Additional Information (highlighted), Alert Subscriptions, Secure FTP, and Secure Messaging. The main content area is titled 'Additional Information' and features an 'Add Fields' section. This section includes input fields for 'Name', 'Data Type' (with a dropdown menu showing 'Text', 'Number', and 'Date'), and 'Display Format' (with a dropdown menu showing 'Single Selection List', 'Multiple Selection List', and 'Textbox'). Below these fields is a 'Save' button and a 'Cancel' button. At the bottom of the 'Add Fields' section is a link to 'Add another item'. Below the 'Add Fields' section is a table listing existing fields. The table has three columns: 'Name', 'Data Type', and 'Display Format'. The rows are: 'Hire Date' (Date, Textbox), 'Company' (Text, Multiple Selection List), 'Department' (Text, Multiple Selection List), 'Street Name' (Text, Textbox), and 'Building Number' (Number, Single Selection List). Each row has edit and delete icons to its right.

Name	Data Type	Display Format
Hire Date	Date	Textbox
Company	Text	Multiple Selection List
Department	Text	Multiple Selection List
Street Name	Text	Textbox
Building Number	Number	Single Selection List

There are three data types available for Additional Information fields:

- ♦ Text can hold any text string.
- ♦ Number must contain a number.
- ♦ Date must be in the date format (yyyy-mm-dd).

Display formats from which to choose:

- ♦ A text box allows any value to be entered.
- ♦ A single selection drop-down list has a list of possible values, and one can be selected.





- ◆ A multiple selection drop-down list has a list of possible values, and one or more can be selected.

There are no limits to the number of fields you can define. Click Add and type a name for the field. Then, select the Data Type and Display Format for the field. Under the selected Display Format, add the corresponding value. Click the link: Add another item to add more values. To change the order in which the values appear, click the Up and Down arrows. (To remove a value from the list, click the Trash Bin in its row.) When your field is complete, click Save.

To edit a field, click the Pencil icon in its row. Make any changes to the name or values of the field. Note that you cannot change the Data Type or Display Format. Click Update to save your changes. Or click Cancel to leave the original values. To delete an Additional Information field, click the Trash Bin in its row. Confirm the deletion. If you already have contacts that have been assigned a value for this field, they lose that information.

## Alert Subscriptions

**NOTE:** The Organization's Settings tab offers Subscription Fields. The Account's Settings tab does not offer Alert Subscriptions.

You can add *types* of notifications to which the recipient (contact) can subscribe to receive notifications. These are available on the Member Portal for a contact to choose. For example, you could offer to notify contacts about several types of traffic conditions in your area. On their profile, the contacts would select the conditions for which they want to receive notifications. Then, when you send the notification, you choose individuals who have opted-in to that type of notification. Of course for an emergency notification, you can disregard all opted-in subscriptions and send to anyone.



Documentation (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe Notifications Incidents Contacts Reports Settings Access

Organization Member Portal

Alert Subscriptions

Add

Add Fields

Type Customized

Heading

Name

Value

Add another item

Save Cancel

Heading	Name	Type
Weather Alerts Only	--	Weather

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Select the Rules option when adding a Notification and Target Audience. By default, the values entered for the alert subscription fields are available for use.

### To add a new Alert Subscription value

- 1 Click the Add button at the top of the Alert Subscriptions page.
- 2 From the Type field, select the type of field to add from the drop-down list:
  - Customized—Can have any values you choose. Type your values, as needed. Select the link: Add another item to add additional values.
  - Weather—Offers a list of predefined values for different weather conditions.
- 3 Type a name for the Alert Subscription field.  
This name is shown on the Member Portal page when the contacts are making their selections.
- 4 Click Save.

To edit a field, click its name in the list. Click in a text box to edit the name or values. Click Update. Click the Trash Bin next to any value to remove it from the list.

To remove an Alert Subscription, click the Trash Bin from its row in the list.

## Secure FTP

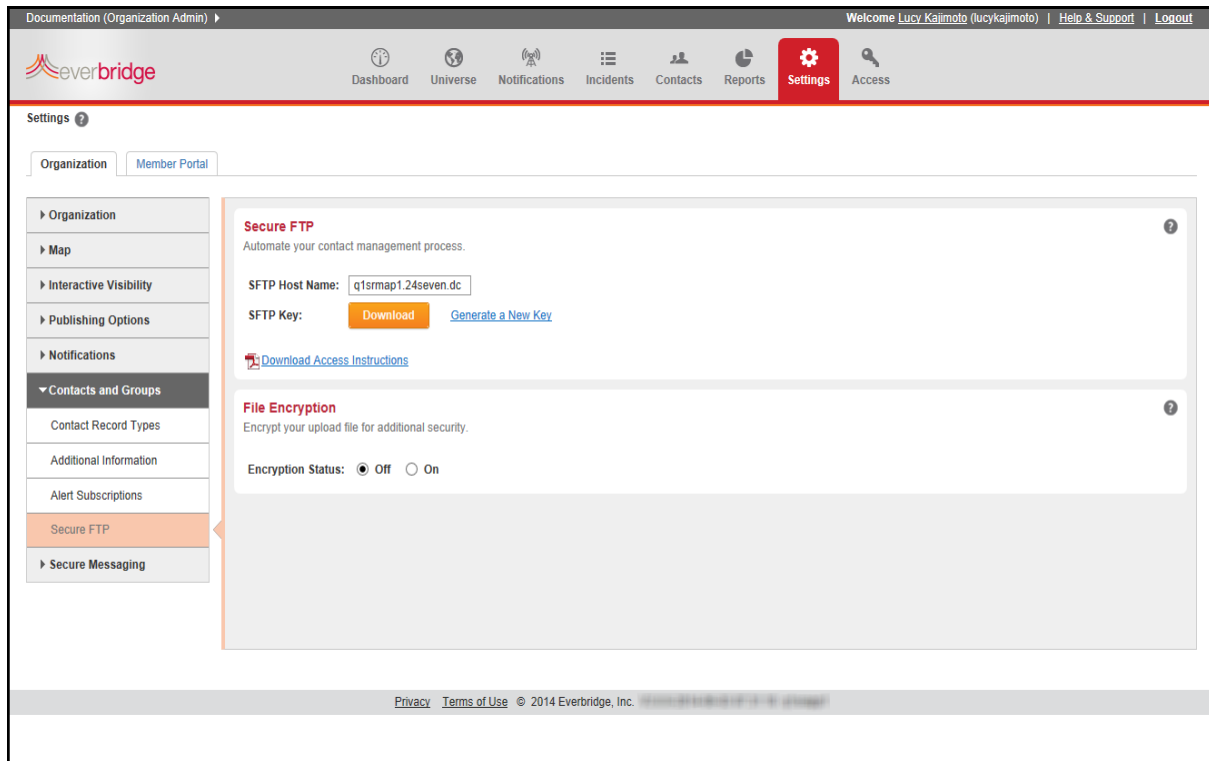
There are various ways to add contacts to Everbridge Suite.

- ◇ An administrator can fill in a form for a single contact and save it to the database.
- ◇ An administrator can use a data file containing a number of contacts and upload it to the database.
- ◇ You can configure another system to automatically add a file containing a number of contacts and upload it to the Everbridge database.

Most organizations use bulk upload methods to add and manage many contacts at once. One way to automate the upload is through the Everbridge interface. You configure your system to add a contact upload file in the Everbridge format. You then script or schedule software that supports Secure File Transfer Protocol (FTP) to upload your file to Everbridge.

Using an automated system saves time and helps to prevent errors. Note that you can use the Secure FTP software to manually upload files. This is a good way to test your connection to Everbridge and make sure that your system is configured properly. However, if you are going to upload files manually, there is no advantage to using Secure FTP software instead of simply uploading through the Everbridge Suite interface.

File Encryption provides a standard encryption method (such as PGP) to generate encryption keys.



The screenshot shows the Everbridge Suite interface. At the top, there's a navigation bar with icons for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings (highlighted), and Access. Below this is a 'Settings' section with tabs for 'Organization' and 'Member Portal'. The left sidebar lists various settings categories: Organization, Map, Interactive Visibility, Publishing Options, Notifications, Contacts and Groups (expanded), Contact Record Types, Additional Information, Alert Subscriptions, Secure FTP (highlighted), and Secure Messaging. The main content area is titled 'Secure FTP' and 'File Encryption'. Under 'Secure FTP', there's a text input for 'SFTP Host Name' (q1smap1.24seven.dc), an 'SFTP Key' section with a 'Download' button and a 'Generate a New Key' link, and a 'Download Access Instructions' link. Under 'File Encryption', there's an 'Encryption Status' section with radio buttons for 'Off' (selected) and 'On'.

By configuring your computer system and Secure FTP software to work together, they can automatically add contact data updates and install them. The computer system needs to add and place the data file in the location configured in the Secure FTP software. The Secure FTP software is scripted to perform the transfer.



FTP instructions are not provided in this document. If you have questions about using FTP, contact your IT department or your Client Services representative.

### To use Secure FTP to upload contact data files

- 1 From the Organization tab > Organization > Base Information, note your Organization ID and the your Contact Data Store Location.
- 2 From the Organization tab > Contacts and Groups < Secure FTP, in the Secure FTP pane, click the link: Download Access Instructions. Save the file to your desktop.

**NOTE:** For cross-organizations, perform the Secure FTP procedure from the Account level (that is, from the Settings tab > Security > Secure FTP) rather than from the Organization level. Include the column to designate your organization names.

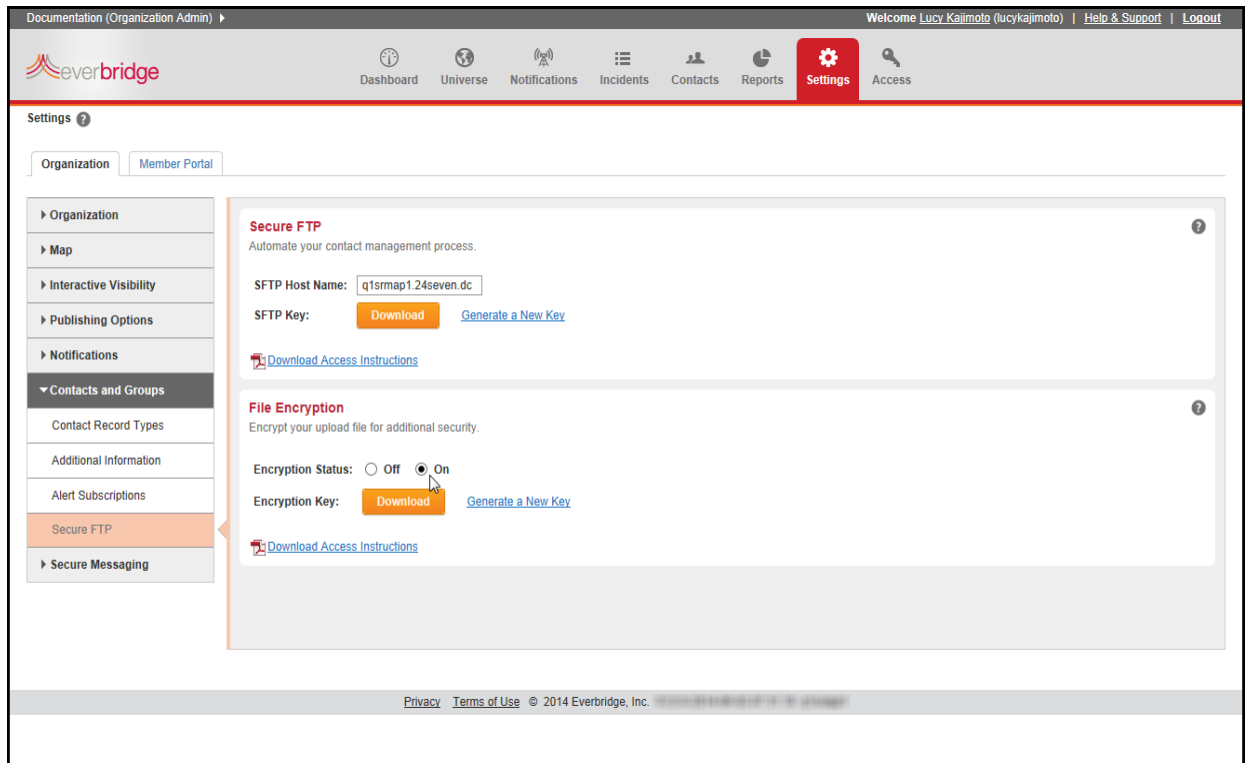
You will need two additional programs to use Secure FTP. Everbridge does not endorse any third-party software, but has examples using programs that others have found useful.

- 3 From the Secure FTP pane, to download the soft key (.key) file for your organization, click the button: Download. Save it to your desktop.  
This soft key needs to be converted into a format that the Secure FTP software can use.
- 4 Following the Access instructions, use the key generating software to take the soft key (.key) file you downloaded and export it to a key (.pgb) file for the software.
- 5 Configure the encryption software, so you can use it to upload contact data files (.pgb).
- 6 To connect to the Everbridge server, you need to supply a *hostname*. Find the *hostname* for your Contact Data Source Location in the Access instructions. Your login username is your Organization ID.  
On the server, there are three folders you will use as destinations for your contact data file, which correspond to the three upload directories from which you choose if you are uploading the file manually:
  - update
  - replace
  - delete
- 7 For more information, see *step 5* on page 211 of the procedure *To upload a list of Contacts using the web-based interface*.

All Account Administrators and only Organization Administrators for the specified organization are sent an email when the Secure FTP upload is done.

## To use File Encryption for additional security

- 1 From the Organization tab, select Contacts and Groups < Secure FTP.
- 2 From the File Encryption pane, select the Encryption Status radio button: On.



- 3 Click the link: Download Access Instructions.
- 4 Save the file to your desktop.
- 5 Follow the instructions from the downloaded file.



# Secure Messaging

Secure Messaging is visible only if it is enabled for your organization. It provides compliance with industry regulations such as HIPAA (Health Insurance Portability and Accountability Act). This means hospitals and other health care clients can use the Everbridge Mobile Member application for their Secure Messaging needs, for example.

## Settings

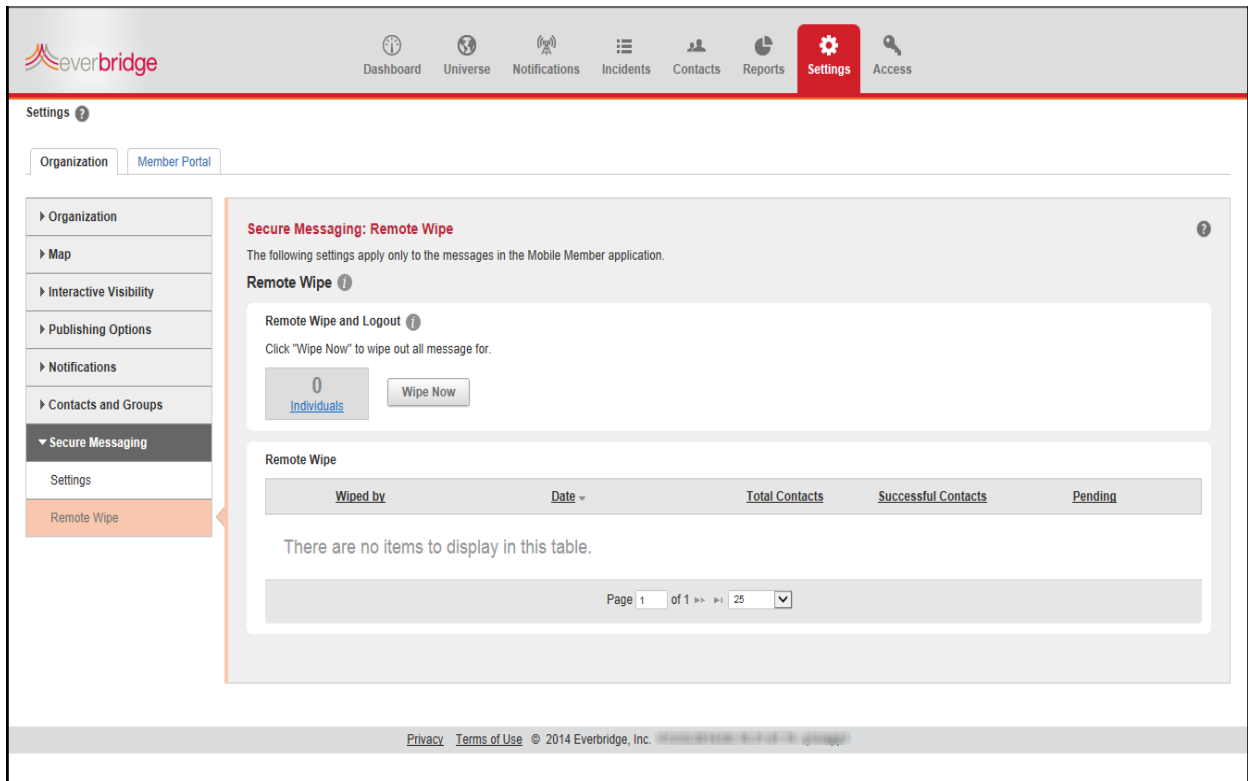
The Secure Messaging settings apply only to the messages in the Mobile Member application. The Message Expiration feature removes (“wipes out”) all messages sent to and from the Mobile Member application after the message has been stored on all Mobile Member applications for the specified period of time. (Select the check box and enter a value of 1-180 days.)

The screenshot shows the Everbridge web interface. At the top is a navigation bar with icons for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings (highlighted in red), and Access. Below the navigation bar is a 'Settings' section with two tabs: 'Organization' and 'Member Portal'. The 'Organization' tab is active. On the left is a sidebar menu with options: Organization, Map, Interactive Visibility, Publishing Options, Notifications, Contacts and Groups, Secure Messaging (expanded), Settings (highlighted), and Remote Wipe. The main content area is titled 'Secure Messaging: Settings' and contains the following text: 'The following settings apply only to the messages in the Mobile Member application.' Below this is a section titled 'Message Expiration' with a checkbox labeled 'Automatically delete messages that are older than' followed by a text input field for 'days'. A 'Save' button is located below the checkbox. At the bottom of the page is a footer with links for Privacy and Terms of Use, and a copyright notice for 2014 Everbridge, Inc.

The Remote Wipe and Logout feature wipes out all messages sent to and from the Mobile Member app for the contacts you select. These contacts will also be logged out of the Mobile Member app and will need to enter their user names and passwords again in order to receive new messages.

## Remote Wipe

The Remote Wipe and logout feature removes (“wipes out”) all messages sent to and from the Everbridge Mobile Member app for the individuals you select from Remote Wipe. You select from individuals that have their credentials logged into at least one instance of the Mobile Member app. Select your contacts, click OK, confirm that the messages will be wiped out, and that the contacts will also be logged out of the Mobile Member app.



**Secure Messaging: Remote Wipe**

The following settings apply only to the messages in the Mobile Member application.

**Remote Wipe**

**Remote Wipe and Logout**

Click "Wipe Now" to wipe out all message for.

0 Individuals [Wipe Now](#)

**Remote Wipe**

Wiped by	Date	Total Contacts	Successful Contacts	Pending
There are no items to display in this table.				

Page 1 of 1 >> 25

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The “Successful” column shows the number of messages that were wiped. The “Pending” column shows the number of messages that are yet to be wiped. That is, the mobile phone might be off or the Everbridge Mobile Member app might not be launched.



# Single Sign-On

At the Account level only, Account Administrators can create Single Sign-On (SSO) settings using SAML (Security Assertion Markup Language) version 2.0. The SSO applies to the Manager Portal only; not Mobile Manager or Mobile Member.

The Single Sign-On workflow is as follows:

- ◇ Your Everbridge representative enables “Single Sign-On” for your account.
- ◇ The Account Administrator configures the settings. (See *SAML Single Sign-On Settings*, next.)
- ◇ The Account Administrator downloads the metadata after the SSO is set and imports the metadata to the Identity Provider (IDP).
- ◇ The Account Administrator uploads or adds users with SSO User IDs into Everbridge Suite. To use SSO, only users with SSO User IDs are able to log in to Everbridge Suite.
- ◇ Users access the Welcome page by means of the URL provided on the SSO setting: Identity Provider Login URL.
- ◇ Users log in to the IDP service provider and are authenticated.
- ◇ Users are redirected and logged in to the appropriate accounts/roles on the Manager Portal after they are authenticated.

## SAML Single Sign-On Settings

From the Account Level, select the Settings tab > Security > Single Sign-On. The SAML Single Sign-On Settings page is displayed.

The screenshot shows the 'SAML Single Sign-On Settings' page within the Everbridge Account Admin interface. The page is titled 'ACCOUNT: New US SQA Account (Account Admin)' and 'Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout'. The left sidebar shows the 'Settings' menu with 'Security' expanded and 'Single Sign-On' selected. The main content area contains the following fields:

- \* Name**: Text input field.
- \* API Name**: Text input field.
- SAML Version**: Dropdown menu set to '2.0'.
- \* Identity Provider Metadata**: Text input field with a 'Browse...' button.
- \* SAML Identity Location**: Radio buttons for 'Identity is in the NamelIdentifier element of the Subject statement' (selected) and 'Identity is in an Attribute element'.
- Identity Provider Login URL**: Text input field.
- Service Provider initiated Request Binding**: Radio buttons for 'HTTP Redirect' (selected) and 'HTTP Post'.
- Save**: Orange button at the bottom.

At the bottom of the page, there is a footer with links for 'Privacy' and 'Terms of Use', and a copyright notice: '© 2014 Everbridge, Inc.'.





Use the following table to complete the required fields. Required fields are indicated with a red asterisk (\*).

Field Name	Description
Name	Specify a name for Single Sign On settings.
API Name	The unique name used by the API, we rely on this attribute to generate "Everbridge Login URL" (below).
SAML Version	2.0
Identity Provider Metadata	Browse to the .xml file that uniquely identifies your SAML identity provider.
SAML Identity Location	The location in the assertion where a user should be identified. Select one of the following radio buttons: <ul style="list-style-type: none"><li>◊ Identity is in the NameIdentifier element of the Subject statement</li><li>◊ Identity is in an Attribute element—When you select this radio button, the required Attribute Name field is displayed.</li></ul>
Identity Provider Login URL	The URL where Everbridge sends a SAML request to start the login sequence.
Service Provider initiated Request Binding	Select the desired radio button: HTTP Redirect or HTTP Post.

For assistance with SSO, contact your Everbridge Account Manager.



# Member Portal

This appendix describes the configuration options available to you for your Everbridge Suite Member Portal. The Member Portal tab is provided for Administrators to configure settings specific to your organization.

**The following topics are covered:**

- ◆ *Member Portal Settings*
- ◆ *Information Collection*
- ◆ *Content*



# Member Portal Settings

From the Settings tab, select the Member Portal tab. Configure your Member Portal settings before distributing access to your contacts.

## Portal Options

Select the Portal Type: Public - Anyone can access the site or Private - Only invited contacts can access the site. If Public, from the Contact Record Type drop-down list, also select the record type that all new sign-ups are assigned.

In the Public Member Portal, members can add new records.

In the Private Member Portal, organizations can offer employees an avenue to augment their organization's uploaded data (first name, last name, company email, and work phone number) with personal data (cell phone, personal email, and home address information) to ensure successful message receipt.

Documentation (Organization Admin) ▶ Welcome Lucy Kasimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe Notifications Incidents Contacts Reports Settings Access

Settings ?

Organization Member Portal

Access Your Portal <https://ssp-qa1.everbridge.net/index/8800387990194>

Portal Options

Information Collection

Content

**Portal Options** ?

Portal Type

☒ Public - Anyone can access the site

☐ Private - Only invited contacts can access the site

Contact Record Type All new sign ups are assigned: Employee ▼

Please configure your Member Portal settings before distributing access to your contacts

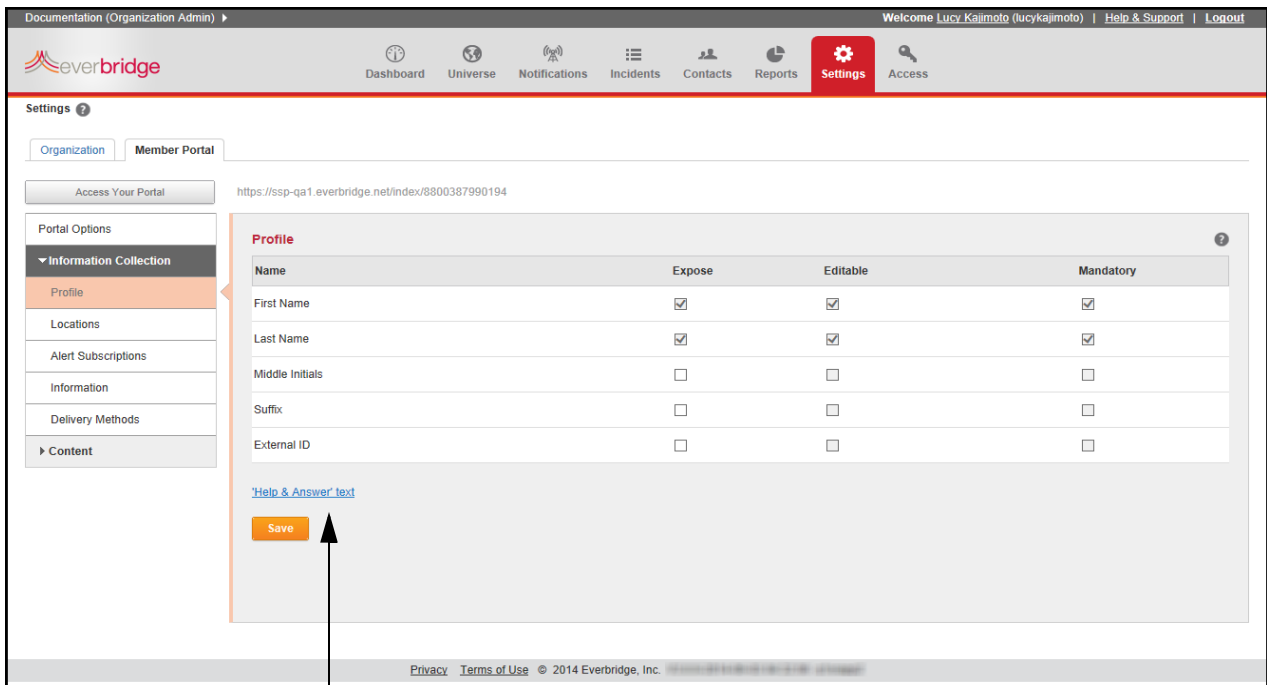
Save

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# Information Collection

## Profile

You can expose user profile settings. If you do, you can make the field editable and/or mandatory as well. Required fields are already selected. Select Save.



The screenshot shows the Everbridge Settings page for the Member Portal. The left sidebar lists various settings categories, with 'Information Collection' expanded and 'Profile' selected. The main content area displays a table for configuring profile fields. The table has four columns: Name, Expose, Editable, and Mandatory. The fields listed are First Name, Last Name, Middle Initials, Suffix, and External ID. First Name and Last Name are checked for all three properties. Middle Initials, Suffix, and External ID are only checked for the Mandatory property. Below the table is a 'Help & Answer' text area and a 'Save' button. An arrow points from the 'Save' button to the text 'Link to provide Help to your members' below the screenshot.

Name	Expose	Editable	Mandatory
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Middle Initials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suffix	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
External ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Help & Answer text](#)

[Save](#)

Link to provide Help to your members



To aid your portal members, you can provide text regarding the specific page. Click the link: 'Help and Answer' Text to display the 'Help & Answer' Text dialog. Edit the text per your organization's policies, then click OK.

The screenshot shows the Everbridge 'Help & Answers' dialog box. The top bar includes the Everbridge logo, navigation icons, and user information: 'Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout'. The left sidebar lists 'Settings' with sub-options: 'Organization', 'Member', 'Access Your Portal', 'Portal Options', 'Information Collection', 'Profile' (selected), 'Locations', 'Alert Subscriptions', 'Information', 'Delivery Methods', and 'Content'. The main area is titled 'Help & Answers' and contains a 'Profile' section. A note states: 'If editing 'Help & Answer' text, remember to keep your information relevant to the specific page, short and concise. Large amounts of text or more general information can be added to the Overview or Frequently Asked Questions page.' Below this is an 'Edit text' area with a rich text editor toolbar and a 'Reset to default' button. The text in the editor reads: 'Your contact information is how we will try to reach you in the event of an emergency. Please double check to make sure you have it entered correctly.' To the right is a 'Live Preview' section showing the same text. At the bottom are 'OK' and 'Cancel' buttons. The footer contains links for 'Privacy' and 'Terms of Use', and a copyright notice: '© 2014 Everbridge, Inc.'.



When a member logs in to the Member Portal, his or her individual Profile page appears.

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Welcome lucykajimoto [Logout](#) [Home](#) [Overview](#) [FAQs](#)

[? Help & Answers](#)

## My Profile

• Username lucykajimoto

• First Name

• Last Name

Here's how to contact me. (Complete at least 2 )

Move up or down to change the order.

☐ ☐ 1) • Primary email

☐ ☐ 2) Primary SMS

☐ ☐ 3) • Primary Day phone

☐ ☐ 4) Phone 1

☐ ☐ 5) Email 2

☐ ☐ 6) Tap

Ext  Pin

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Clicking the blue question mark (located in the upper left-hand section of the screen) displays the text you added from the link: 'Help & Answer' Text link Click the blue "X" to close the Help & Answer text.

The screenshot displays the Everbridge Member Portal interface. At the top left is the Everbridge logo. Below it, a dark navigation bar contains the text "Welcome lucykajimoto" and a "Logout" link. On the right side of this bar are links for "Home", "Overview", and "FAQs". A blue question mark icon is visible in the upper left area of the main content. A dark overlay box titled "X Help & Answers" is open, containing the text: "Your contact information is how we will try to reach you in the event of an emergency. Please double check to make sure you have it entered correctly." The main content area shows a form for contact information. It includes fields for "Username" (lucykajimoto), "First Name" (Lucy), and "Last Name" (Kajimoto). Below these is a section titled "Here's how to contact me. (Complete at least 2)" with instructions to "Move up or down to change the order." There are three contact methods listed: 1) Primary email (lucy.kajimoto@everbridge.com), 2) Primary SMS (United States, 6619938074), and 3) Primary Day phone (United States, 555-555-5555). The third method is highlighted with a yellow background.





In the section called My Profile, click Edit to change personal information and prioritize how to be contacted.

The screenshot displays the Everbridge user interface. At the top left is the Everbridge logo. Below it, a dark navigation bar contains the text "Welcome lucykajimoto" and a "Logout" link. To the right of this bar are links for "Home", "Overview", and "FAQs". A blue button labeled "? Help & Answers" is positioned on the left side of the main content area. The main content area features several sections: "My Profile" with an "Edit" link, "My Alert Subscriptions" with an "Edit" link, "My Locations" with an "Edit" link, and "My Information" with an "Edit" link. The "My Profile" section displays the following information: Username: lucykajimoto, First Name: Lucy, Last Name: Kajimoto, Primary email: lucy.kajimoto@everbridge.com, and Primary SMS: 6619938074. The "My Alert Subscriptions" section shows "175 Weather Alerts". The "My Information" section shows "Department: Engineering". At the bottom of the page, a dark footer contains the text "Powered by everbridge" followed by links for "Terms of Use" and "Privacy Policy", and a copyright notice: "© 2014 Everbridge, Inc. V3.1.0-2014-07-23 01:52:59".



If members need to change their passwords, they must click the Change Password link next to the Username on the My Profile page.

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Welcome lucykajimoto [Logout](#) [Home](#) [Overview](#) [FAQs](#)

[? Help & Answers](#)

## My Profile

• Username lucykajimoto [Change Password link](#)

• First Name Lucy

• Last Name Kajimoto

Here's how to contact me. (Complete at least 2 )

Move up or down to change the order.

☐ ☐ 1) • Primary email lucykajimoto@everbridge.com

☐ ☐ 2) Primary SMS United States 6619938074

☐ ☐ 3) • Primary Day phone United States 555-555-5555

Ext 5555

☐ ☐ 4) Phone 1 United States 555-555-5555

☐ ☐ 5) Email 2 email@email.com

☐ ☐ 6) Tap United States 555-555-5555

Pin 5555

[Save](#) [Cancel](#)

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The Change Password page appears. Fill in the fields per the on-screen instructions, then click Save.

Passwords are case sensitive, and may contain uppercase letters, lowercase letters, and numbers. Your password must be 8 to 64 characters long, and contain at least one letter and one number. Special characters are permitted, but limited to !@#\$\$%^&\*().

**NOTE:** Your password does not expire. However, if you have both a Member Portal account and a Manager Portal account, then your password expires in 90 days. If you change your password during the 90-day period, the counter resets to zero (0) and starts a new 90-day cycle.



# Locations

## Displaying/Collecting Address Information

You can use the Locations page to either display pre-loaded addresses to your members or collect address information from your members.

If you enable this option, then you can also allow your members to edit any pre-loaded addresses or add addresses.

Use the "Mandatory" option to require your members to add at least one address in order to save their member profile.

Name	Expose	Editable	Mandatory
Location	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

☐ Use a Geo-Fence to control addresses  
Location must be 'Editable' (above) for the Geo-Fence to be active in your Member Portal.  
[Edit Geo-Fence](#) | [Preview on map](#)

**Help & Answers**  
Address Entry Page : [Help & Answer text](#)  
Address verification page : [Help & Answer text](#)

[Save](#)

## Geo-Fence

A geo-fence is a virtual perimeter for a real-world geographic area you can use to control the addresses your members may add to their profiles. In Everbridge Suite, you use shapes to define a geo-fence.

You can enable a geo-fence in three steps:

- 1 Select one or more shapes for your geo-fence.
- 2 Select the location handling rule for your organization.
- 3 Enable the geo-fence.

### To select one or more shapes

- 1 Add the desired shapes to Settings > Organization > Map > My Shapes.
- 2 Return to Settings > Member Portal > Information Collection > Locations.



- 3 Select the link: "Edit Geo-Fence" to view the list of shapes available for this organization.
- 4 Select the check box for the shape.
- 5 Save your changes.

You can add any number of shapes to your geo-fence at any time. Use the reverse steps to remove a shape from your geo-fence at any time.

## Selecting the Location Handling Rule

By default, the application will not save an address in a member's profile if the Latitude and Longitude for the address is outside of the geo-fence shape(s). If you want the application to accept any address, then check the box: "Add addresses even if outside the geo-fence". You will be able to later review a Quick Report of any addresses outside your geo-fence.

## Enabling Your Geo-Fence

You must enable the geo-fence if you want Everbridge Suite to compare the addresses that your member enters to your geo-fence. Select the check box: "Use a Geo-Fence to control addresses" to instruct Everbridge Suite to use your geo-fence.

You can temporarily or permanently disable your geo-fence at any time. When you disable your geo-fence, the application will not compare any new addresses or changes to existing member addresses to your geo-fence.

**NOTE:** Your existing member addresses will not be affected if you remove or change your geo-fence. Any changes you make to your geo-fence will only affect addresses entered or edited after you save the new geo-fence.



Documentation (Organization Admin)

Welcome Lucy Kajimoto (lucykajimoto) | [Help & Support](#) | [Logout](#)

[Dashboard](#) [Universe](#) [Notifications](#) [Incidents](#) [Contacts](#) [Reports](#) [Settings](#) [Access](#)

Settings ?

[Organization](#) [Member Portal](#)

[Access Your Portal](#) <https://sp-qa1.everbridge.net/index/8800387990194>

Portal Options

Information Collection

Profile

Locations

Alert Subscriptions

Information

Delivery Methods

Content

Locations ?

Name	Expose	Editable	Mandatory
Location	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

☒ Use a Geo-Fence to control addresses  
Location must be 'Editable' (above) for the Geo-Fence to be active in your Member Portal.  
[Edit Geo-Fence](#) | [Preview on map](#)  
Select Geo-Fence from My Shapes  
☐ Add addresses even if outside of fence

☒ US

☒ Glendale

☒ Los Angeles

Help & Answers

Address Entry Page : [Help & Answer text](#)

Address verification page : [Help & Answer text](#)

Save

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In the section called My Locations, click Edit. Members can add and edit their own locations.

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Welcome lucykajimoto [Logout](#) [Home](#) [Overview](#) [FAQs](#)

[? Help & Answers](#)

## My Locations

We will use the location information you provide to inform you about events taking place in your area.

Location Name	Address	
Work	500 N Brand Blvd	<a href="#">Edit</a> <a href="#">Delete</a>

### Add a Location

\* Location Name

**This field is required.**

\* Country

\* Address

Apt/Suite/Unit

City

State/Province

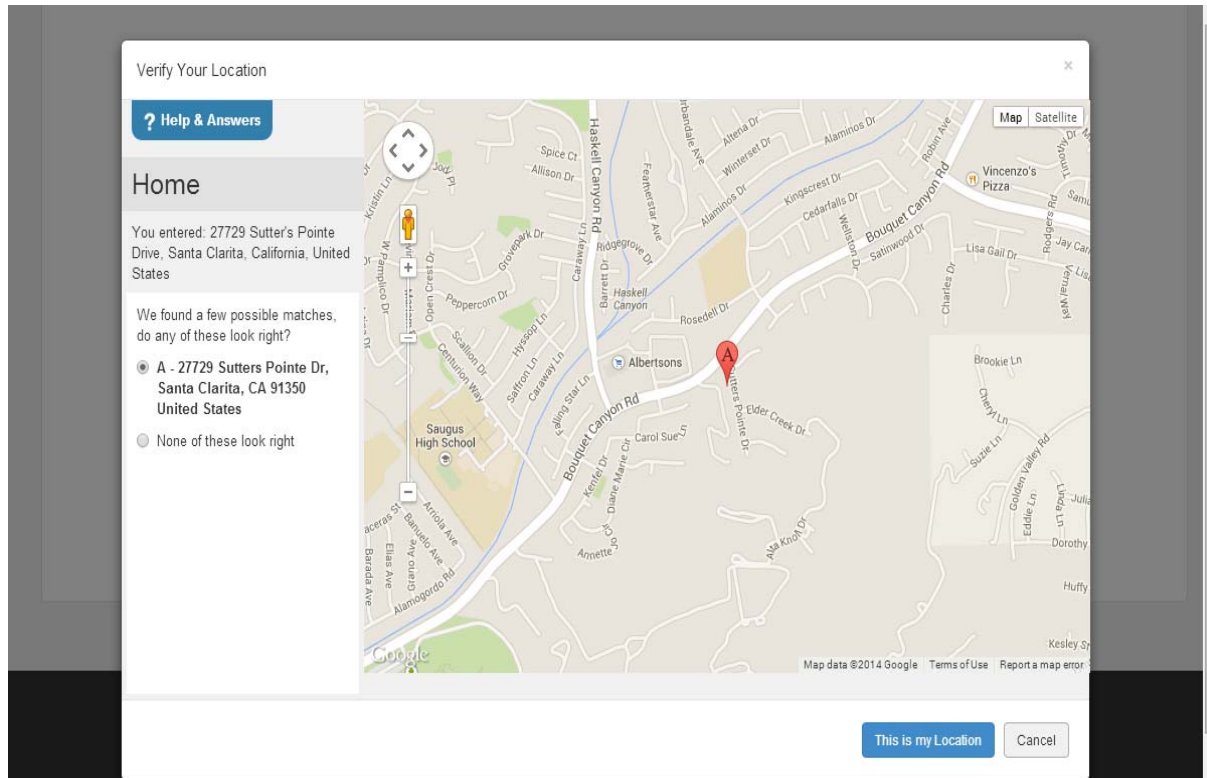
Postal Code

[Verify This Address](#) [Cancel](#)

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When you enter or edit a location, click Verify This Address. A map shows locations that are possible matches. Select the respective radio button and then This is My Location. See the following example map.







## Alert Subscriptions

Alert subscriptions are available for all organizations by default. Any organization can add as many custom subscriptions as desired. The Account Administrator and/or the Organization Administrator determine the custom subscriptions.

### Weather Alerts

The only subscription type that requires an additional purchase is the Weather Alerts. The National Weather Service (NWS) sends alerts to the weather providers, who forward the alerts to Everbridge. Everbridge then automatically sends weather warnings.

On the Alerts page, you can turn off automated weather and hazard alerts. Of the choices for the alerts, you can expose a field and/or make a field mandatory as well. Under the New column, you can toggle a new alert on or off, and under the All Clear column, you can toggle an All Clear alert on or off. Select Save.

Documentation (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | [Help & Support](#) | [Logout](#)

Dashboard Universe Notifications Incidents Contacts Reports **Settings** Access

**Settings** ?

Organization Member Portal

Access Your Portal <https://ssp-qa1.everbridge.net/index/8800387990194>

Portal Options

- ▼ Information Collection
- Profile
- Locations
- Alert Subscriptions**
- Information
- Delivery Methods
- Content

**Alert Subscriptions** ?

☐ Turn off automated weather and hazard alerts (Once you have disabled this function, subscribers will not receive any automated weather and hazard alerts.)

Heading	Name	Expose	Mandatory	New	All Clear
▼ Weather Alerts Only	<a href="#">Quiet Period Settings</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	▼ Marine	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Brisk Wind Watch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ON	<input type="checkbox"/> ON
	Brisk Wind Warning	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ON	<input type="checkbox"/> ON
	Brisk Wind Advisory	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ON	<input type="checkbox"/> ON
	Gale Watch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ON	<input type="checkbox"/> ON
	Gale Warning	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ON	<input type="checkbox"/> ON
	Gale Advisory	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ON	<input type="checkbox"/> ON
	Hurricane Force Wind Watch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ON	<input type="checkbox"/> ON
	Hurricane Force Wind Warning	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> ON	<input type="checkbox"/> ON



Click the link: Quiet Period Settings. Configure your default Member Portal settings and click Save.

**Quiet Periods**

This will allow your members to specify a time period during which they do not want to receive automated weather alerts. The Quiet Period option will be available on your member portal.

☒ Enable Quiet Periods for my members

**Default Settings**  
Don't send between specified times

09:00 PM  
and  
08:00 AM  
( GMT -8:00)Pacific Daylight Time(Americ...)

**Quiet Period Override**  
During life-threatening weather events, you may want Everbridge to deliver a notification even if the alert is issued during the member's quiet period.

Send alerts for selected weather events, even during a Quiet Period

- ☐ Coastal Flood Warning ⓘ
- ☐ Flash Flood Warning ⓘ
- ☒ Severe Thunderstorm Warning ⓘ  
Send: ☒ New ☒ All clear
- ☒ Tornado Warning ⓘ  
Send: ☒ New ☒ All clear
- ☐ Tsunami Warning ⓘ

Save Cancel

For details about Weather Alerts, see the *SMART Weather Alerting User Guide*.



When the member launches the Member Portal, in the section called My Alerts section, click Edit.

The screenshot displays the Everbridge Member Portal interface. At the top, the Everbridge logo is visible. Below the header, a navigation bar shows 'Welcome lucykajimoto' and a 'Logout' link. A 'Help & Answers' button is on the left. The main content area is titled 'My Alert Subscriptions' with the instruction 'Choose what you want to be informed about.' Below this, there are two subscription options: 'Weather' (selected with a checked checkbox) and 'City of Santa Clarita' (unchecked). An arrow points to the 'Weather' subscription. At the bottom of the form are 'Save' and 'Cancel' buttons. The footer contains the text 'Powered by Everbridge' with links to 'Terms of Use' and 'Privacy Policy', and a copyright notice: '© 2014 Everbridge, Inc. V3.1.0-2014-07-23 01:52:59'.



Click the plus (+) sign to expand the alert list. Members can clear the check boxes for the alerts they do not want made available.

The screenshot shows the Everbridge Member Portal interface. At the top, the Everbridge logo is displayed. Below it, a navigation bar includes a welcome message for 'lucykajimoto', a 'Logout' link, and links for 'Home', 'Overview', and 'FAQs'. A 'Help & Answers' button is also present. The main section is titled 'My Alert Subscriptions' with the instruction 'Choose what you want to be informed about.' Below this, there are two main categories: 'Weather' and 'City of Santa Clarita'. The 'Weather' category is expanded, showing a list of alert types with checkboxes and counts: Marine (40), Hazard (3), Fire (4), Non-Precipitation (30), Severe (6), Tsunami (3), Tropical (16), Wind (15), Flood (18), and Winter (40). To the right of this list is a 'Weather and Hazard Alerts Settings' panel. It includes a checkbox for 'Don't contact me between:' which is checked. Below this are two time selection fields: '09:00' and '08:00', each with a dropdown arrow. Between these fields is the word 'and'. To the right of the '08:00' field is an 'AM' dropdown arrow. Below the time fields is a dropdown menu showing '( GMT -8:00)Pacific Daylight Time(America/Los\_Angeles)'. At the bottom of the 'Weather' section are 'Save' and 'Cancel' buttons. The footer of the page includes the text 'Powered by Everbridge' with a logo, links for 'Terms of Use' and 'Privacy Policy', and a copyright notice: '© 2014 Everbridge, Inc. V3.1.0-2014-07-23 01:52:59'.

everbridge

Welcome lucykajimoto [Logout](#) [Home](#) [Overview](#) [FAQs](#)

? Help & Answers

## My Alert Subscriptions

Choose what you want to be informed about.

☒ Weather

- ☒ Marine (40)
- ☒ Hazard (3)
- ☒ Fire (4)
- ☒ Non-Precipitation (30)
- ☒ Severe (6)
- ☒ Tsunami (3)
- ☒ Tropical (16)
- ☒ Wind (15)
- ☒ Flood (18)
- ☒ Winter (40)

☐ City of Santa Clarita

Weather and Hazard Alerts Settings

☒ Don't contact me between:

09:00 PM and 08:00 AM

( GMT -8:00)Pacific Daylight Time(America/Los\_Angeles)

Save Cancel

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In addition, members can specify a “No Contact” time period. In the Weather and Hazard Alerts Settings pane, select the check box: Don’t contact me between. Then, from the drop-down lists, select the time range and time zone. Select Save.

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Welcome lucykajimoto [Logout](#) [Home](#) [Overview](#) [FAQs](#)

[? Help & Answers](#)

## My Alert Subscriptions

Choose what you want to be informed about.

- ☐ **Weather**
  - ☒ Marine (40)
  - ☐ Hazard (3)
    - ☐ Ashfall Watch
    - ☐ Ashfall Warning
    - ☐ Ashfall Advisory
  - ☒ Fire (4)
  - ☒ Non-Precipitation (30)
  - ☒ Severe (6)
  - ☐ Tsunami (3)
  - ☐ Tropical (16)
  - ☒ Wind (15)
  - ☒ Flood (18)
  - ☒ Winter (40)
- ☐ **City of Santa Clarita**

**Weather and Hazard Alerts Settings**

☒ Don't contact me between:

09:00 PM and 08:00 AM

( GMT -8:00)Pacific Daylight Time(America/Los\_Angeles)

[Save](#) [Cancel](#)

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## Information

Additional Information fields are populated here with the values that the organization has set up in Contacts and Groups > Additional Information. You can expose this information, or make the fields editable and/or mandatory by selecting the respective check boxes. Select Save.

The screenshot shows the Everbridge Settings page for the Member Portal. The left sidebar lists various settings categories, with 'Information' selected. The main content area displays a table of information fields that can be configured for exposure and editability on the member portal.

Name	Expose	Editable	Mandatory
Hire Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Street Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Building Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Below the table, there is a link for ['Help & Answer' text](#) and a [Save](#) button.

You can expose selected Information fields on the Member Portal. If you do, you can make the field editable and/or mandatory as well.



In the section called My Information, click Edit.

The screenshot displays the Everbridge user interface. At the top, the Everbridge logo is visible. Below it, a navigation bar shows 'Welcome lucykajimoto' and a 'Logout' link. To the right of the navigation bar are links for 'Home', 'Overview', and 'FAQs'. A blue button labeled '? Help & Answers' is located on the left side of the main content area. The main content area is titled 'My Information' and contains a form with the following fields:

- Department:** A checkbox for 'Engineering' is checked, and a checkbox for 'Quality Assurance' is unchecked.
- Building Number:** An empty text input field.
- Location Type:** An empty text input field.
- Company:** Two checkboxes are present: 'Everbridge, Inc.' (checked) and 'Mass Notification Group' (unchecked).

At the bottom of the form are two buttons: a blue 'Save' button and a grey 'Cancel' button.



## Delivery Methods

You can expose Delivery Methods. If you do, you can make the fields editable and/or mandatory as well. By selecting the check box: Allow Members to re-order delivery methods, in the Member Profile, members can reprioritize their delivery methods.

In addition, you can select the minimum number of required delivery methods from the drop-down list or type the number if it does not yet exist. Select Save.

The screenshot shows the Everbridge Settings page for the Member Portal. The left sidebar contains a menu with options: Portal Options, Information Collection (selected), Profile, Locations, Alert Subscriptions, Information, Delivery Methods (highlighted), and Content. The main content area is titled 'Delivery Methods' and includes a checkbox 'Allow Members to re-order delivery methods' which is checked. Below this is a table with columns: Name, Expose, Editable, and Mandatory. The table lists seven delivery methods: Work Email, Work Phone, Text Message, TAP Pager, Home Email, TTY 1, and Mobile Member App. The 'Expose' and 'Editable' columns have checkboxes, and the 'Mandatory' column has checkboxes. The 'Expose' and 'Editable' checkboxes are checked for all methods except TTY 1 and Mobile Member App. The 'Mandatory' checkbox is checked for Work Email. Below the table is a dropdown menu for 'minimum number of required contact paths' set to 2, and a 'Save' button.

Name	Expose	Editable	Mandatory
Work Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Work Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Text Message	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TAP Pager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Home Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TTY 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobile Member App	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

minimum number of required contact paths 2





After selecting Edit next to My Profile, the *Here's how to contact me* section displays fields for the members to fill in their delivery method numbers. They can reorder the delivery method priority if you selected the check box: Allow Members to re-order delivery methods. Members can select the Up and Down arrows to re-order their delivery methods. Members must click Save after entering their information.

Here's how to contact me. (Complete at least 2)

Move up or down to change the order.

<input type="checkbox"/> 1) * Primary email	Lucy.Kajimoto@Everbridge.com	
<input type="checkbox"/> 2) * Primary Day phone	United States <input type="checkbox"/>	8182309732
	Ext	2207
<input type="checkbox"/> 3) Email 2	LKajimoto@hotmail.com	
<input type="checkbox"/> 4) Phone 1	United States <input type="checkbox"/>	555-555-5555
<input type="checkbox"/> 5) Primary SMS	United States <input type="checkbox"/>	555-555-5555
<input type="checkbox"/> 6) Tap	United States <input type="checkbox"/>	555-555-5555
	Pin	5555

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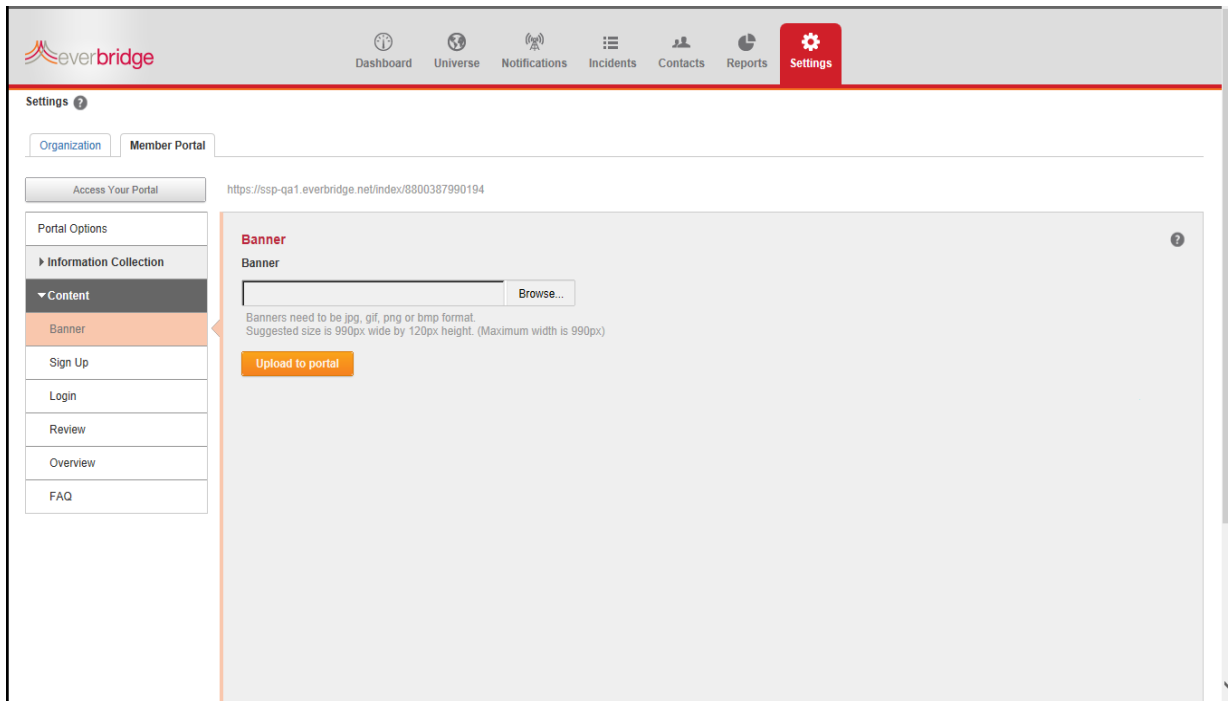
© 2014 Everbridge, Inc. V3.0.0-2014-06-03 07:33:23



# Content

## Banner

You can upload a banner to your Member Portal. Banners must be of format: jpg, gif, png, or bmp. Suggested size is 990 pixels by 120 pixels. The maximum width is 990 pixels.

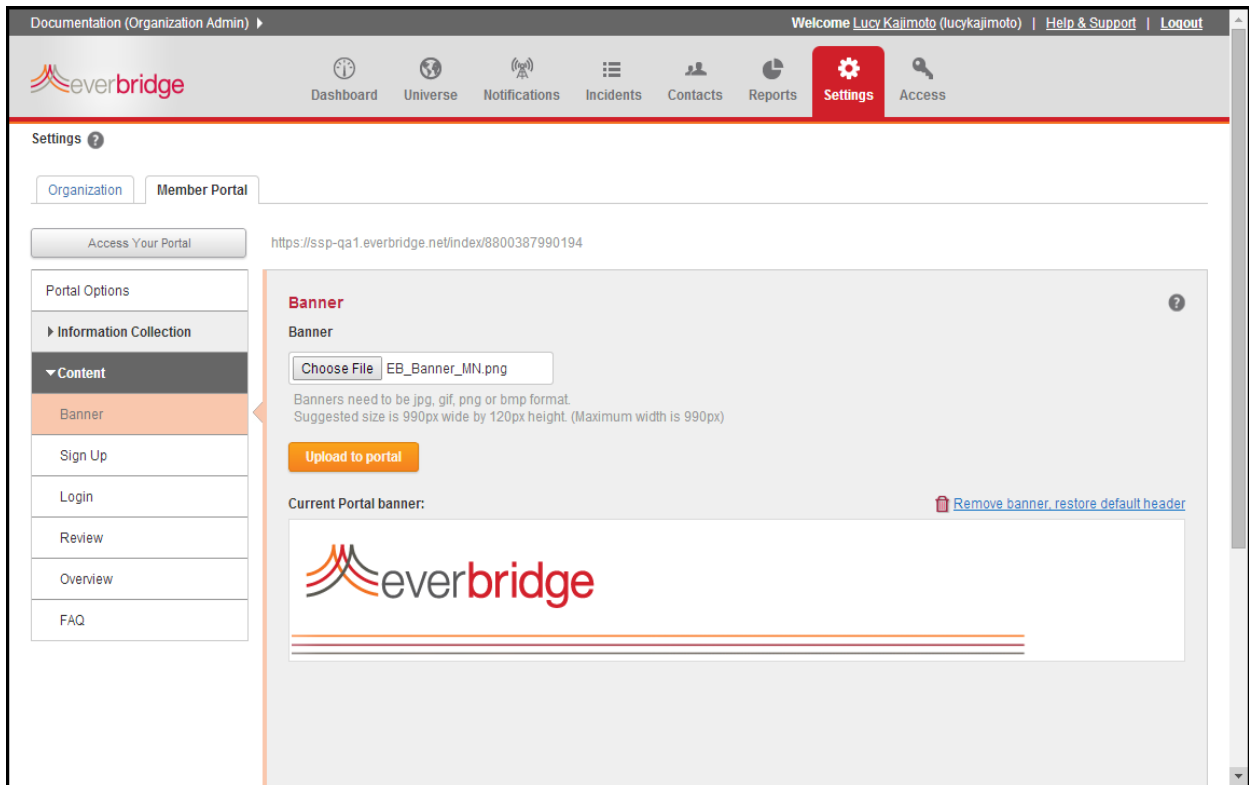


**NOTE:** Be careful. If you have an existing banner and upload a different banner to the portal, and then change your mind, you must upload the original banner. In other words, you cannot cancel your upload.

Browse to your desired banner, then click Upload to portal.



In addition, you can include an in-portal Help link, which allows your members to contact your organization. Select the check box and click Save. The following is an example banner.



The banner appears on all pages of the Member Portal. The following is an example Home page with the Banner.



The screenshot displays the Everbridge Member Portal for user **lucykajimoto**. The interface includes a top navigation bar with links for **Home**, **Overview**, and **FAQs**. A sidebar on the left contains a **Help & Answers** link. The main content area is divided into several sections:

- My Profile**: Contains fields for Username (lucykajimoto), First Name (Lucy), Last Name (Kajimoto), Primary email (lucy.kajimoto@everbridge.com), and Primary SMS (6619938074). An **Edit** link is present.
- My Alert Subscriptions**: Shows **175 Weather Alerts**. An **Edit** link is present.
- My Locations**: An empty section with an **Edit** link.
- My Information**: Contains the field **Department: Engineering**. An **Edit** link is present.

The footer of the portal states: "Powered by Everbridge" with links to **Terms of Use** and **Privacy Policy**, followed by the copyright notice: "© 2014 Everbridge, Inc. V3.1.0-2014-07-23 01:52:59".



# Sign Up

Select the items you want to expose and/or make editable on your Sign-up page. Remember to select the Mandatory check box if you want the Registration Email Address to be required on the Member Portal.

In addition, you can enter custom Help & Answer text.

The screenshot shows the Everbridge Settings interface. The top navigation bar includes links for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, and Settings (highlighted in red). The left sidebar shows the 'Settings' menu with 'Organization' and 'Member Portal' tabs. Under 'Member Portal', there is a list of options: Portal Options, Information Collection, Content (expanded), Banner, Sign Up (highlighted), Login, Review, Overview, and FAQ. The main content area is titled 'Sign Up' and contains a table with columns: Name, Expose, Editable, and Mandatory. The table has one row for 'Registration Email Address' with checkboxes for 'Expose' and 'Editable' checked, and 'Mandatory' unchecked. Below the table is a text input field labeled 'Help & Answer text' and a 'Save' button. The footer of the page includes links for Privacy and Terms of Use, and a copyright notice for Everbridge, Inc. 2014.

Name	Expose	Editable	Mandatory
Registration Email Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Help & Answer text

Save



## New Member Registration

If this is the first time the members have entered the Member Portal, they should click Sign Up to add their personal information.

**Sign up**

Creating a profile takes just a few minutes. Remember your username and password so you can log in and change your information at any time.

• Username

Usernames must be a minimum of 4 acceptable characters. Acceptable characters are: uppercase and lowercase letters, numbers, period, dash (-), underscore (\_), and at symbol (@). No other characters or symbols are permitted at this time.

• First Name

• Last Name

• Password

Password must be 8 to 64 characters long and contain at least one letter and one number. Special characters are permitted, but limited to !@#%\*&^().

• Confirm Password

• Security Question

• Answer

Registration Email

☐ I accept the [Terms of Use](#)

[Create Your Account >](#)


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When the member completes the Sign Up page and clicks Create Your Account, the next set of pages appear, starting with My Profile. Progress indicators at the top of the page show the member the pages to accept “as is” or change, then click Save & Continue.

**NOTE:** There is no “Back” button. These pages can be updated later by logging in and then clicking Edit on the individual page to be modified.





Welcome AFKajimoto [Logout](#)

[? Help & Answers](#)

Profile

Locations

Alerts

Information

Review

## My Profile

\* First Name

Allison

\* Last Name

Kajimogto

Registration Email

afkajimoto@hotmail.com

Here's how to contact me. (Complete at least 2 )

Move up or down to change the order.

▲ ▼

1) \* Primary email

afkajimoto@hotmail.com

▲ ▼

2) \* Primary Day phone

United States ▼

555-555-5555

Ext

5555

▲ ▼

3) Phone 1

United States ▼

555-555-5555

▲ ▼

4) Primary SMS

United States ▼

555-555-5555

▲ ▼

5) Email 2

email@email.com

▲ ▼

6) Tap


United States ▼

555-555-5555

Pin

5555

Save & Continue >

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When the personal information on My Profile is valid, click Save & Continue. My Locations is displayed.

The screenshot shows the Everbridge Member Portal interface. At the top left is the Everbridge logo. Below it is a dark grey navigation bar with the text "Welcome AFKajimoto" and a "Logout" link. A blue button labeled "? Help & Answers" is positioned below the navigation bar. The main content area features a horizontal breadcrumb trail with five steps: "Profile", "Locations" (which is highlighted), "Alerts", "Information", and "Review". Below the breadcrumb trail is the heading "My Locations" in blue, followed by a subtext: "We will use the location information you provide to inform you about events taking place in your area." The "Add a Location" section contains a form with the following fields: "Location Name" (text input with "Work"), "Country" (dropdown menu with "United States"), "Address" (text input with "699 Exposition Blvd"), "Apt/Suite/Unit" (text input with "Room 106"), "City" (text input with "Los Angeles"), "State/Province" (dropdown menu with "California"), and "Postal Code" (text input with "90089"). At the bottom of the form are two buttons: "Verify This Address" (blue) and "Skip this" (grey). The footer of the page is dark grey and contains the text "Powered by Everbridge" with the logo, followed by links for "Terms of Use" and "Privacy Policy", and a copyright notice: "© 2014 Everbridge, Inc. V3.1.0-2014-07-23 01:52:59".

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Welcome AFKajimoto [Logout](#)

? Help & Answers

Profile Locations Alerts Information Review

## My Locations

We will use the location information you provide to inform you about events taking place in your area.

### Add a Location

• Location Name

• Country

• Address

Apt/Suite/Unit

City

State/Province

Postal Code

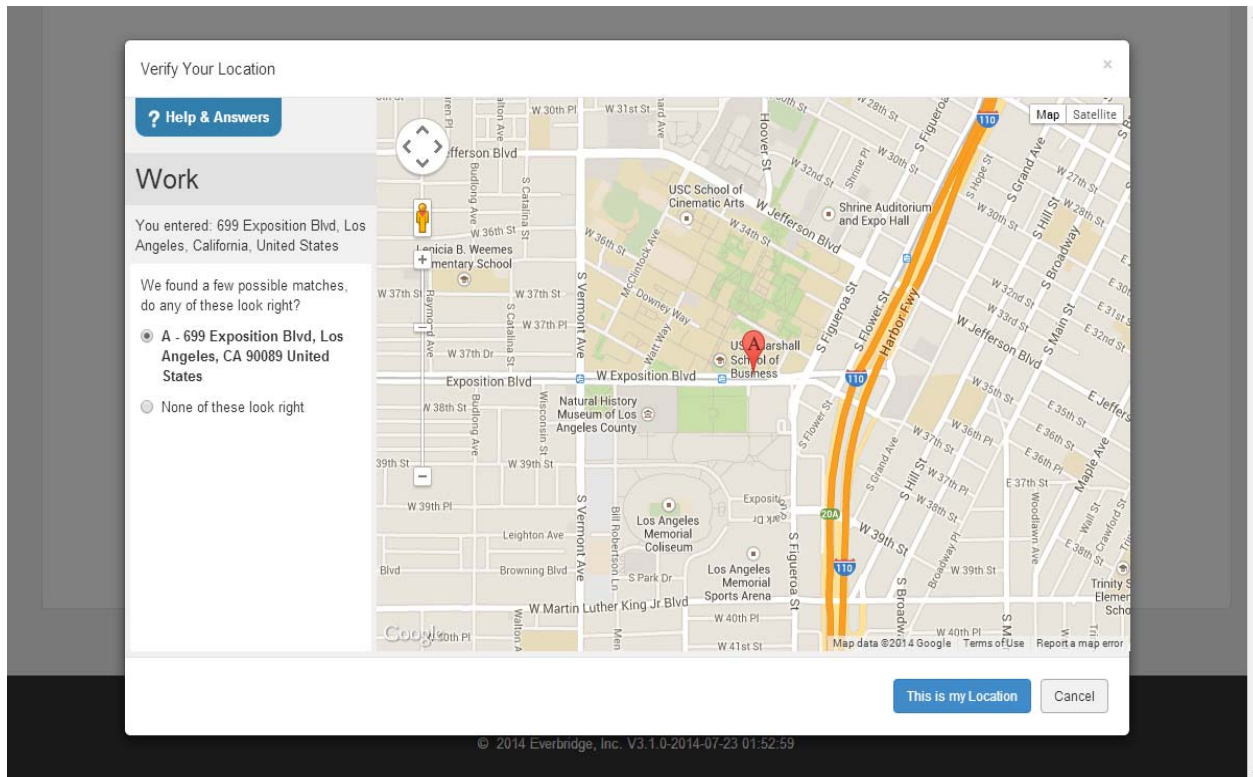
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Fill in the fields and click Verify This Address. A map shows locations that are possible matches. Select the respective radio button and then This is My Location. See the following example map.





The location you just verified is listed on the My Locations page. To enter another location, select Add Another Location. When done, select Save & Continue.

The screenshot shows the Everbridge Member Portal interface. At the top is the Everbridge logo. Below it is a navigation bar with the text "Welcome AFKajimoto" and a "Logout" link. A "Help & Answers" button is on the left. The main navigation area contains five tabs: "Profile", "Locations" (which is active), "Alerts", "Information", and "Review". The "My Locations" section is displayed, with a sub-header stating: "We will use the location information you provide to inform you about events taking place in your area." Below this is a table with two columns: "Location Name" and "Address". The table contains one entry: "Work" with the address "699 Exposition Blvd". To the right of the address are links for "Edit" and "Delete". Below the table is a button labeled "+ Add Another Location". At the bottom right of the main content area is a blue button labeled "Save & Continue >". The footer of the page includes the text "Powered by Everbridge" with the logo, links for "Terms of Use" and "Privacy Policy", and a copyright notice: "© 2014 Everbridge, Inc. V3.1.0-2014-07-23 01:52:59".

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Welcome AFKajimoto [Logout](#)

? Help & Answers

Profile Locations Alerts Information Review

### My Locations

We will use the location information you provide to inform you about events taking place in your area.

Location Name	Address
Work	699 Exposition Blvd <a href="#">Edit</a> <a href="#">Delete</a>

+ Add Another Location

Save & Continue >

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The My Alerts page is displayed, where you can select the alerts you want to know about.

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Welcome AFKajimoto [Logout](#)

[? Help & Answers](#)

Profile Locations Alerts Information Review

## My Alert Subscriptions

Choose what you want to be informed about.

☐ + Weather

☐ + City of Santa Clarita

[Save & Continue >](#) [Skip this](#)

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Click the plus (+) sign to expand the alert list. Click the alerts you want to know about. Members can clear the check boxes for the alerts they do not want made available.

The screenshot shows the Everbridge Member Portal interface. At the top is the Everbridge logo. Below it is a navigation bar with the text "Welcome AFKajimoto" and a "Logout" link. A "Help & Answers" button is on the left. The main content area has a breadcrumb trail: Profile > Locations > Alerts > Information > Review. The "Alerts" tab is active. The page title is "My Alert Subscriptions" with the subtitle "Choose what you want to be informed about." Below this is a list of alert categories, each with a checkbox and a plus icon to expand the list:

- ☒ Weather
  - ☒ Marine (40)
  - ☒ Hazard (3)
  - ☒ Fire (4)
  - ☒ Non-Precipitation (30)
  - ☒ Severe (6)
  - ☒ Tsunami (3)
  - ☒ Tropical (16)
  - ☒ Wind (15)
  - ☒ Flood (18)
  - ☒ Winter (40)
- ☐ City of Santa Clarita

To the right of the list is a "Weather and Hazard Alerts Settings" panel. It contains a checkbox for "Don't contact me between:" followed by time and AM/PM selectors: "09:00" (dropdown), "PM" (dropdown), "and", "08:00" (dropdown), "AM" (dropdown). Below this is a dropdown menu labeled "Please select..."



In addition, members can specify a “No Contact” time period. In the Weather and Hazard Alerts Settings pane, select the check box: Don’t contact me between. Then, from the drop-down lists, select the time range and time zone. Select Save & Continue.

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Welcome AFKajimoto [Logout](#)

[? Help & Answers](#)

Profile Locations **Alerts** Information Review

## My Alert Subscriptions

Choose what you want to be informed about.

☐ **Weather**

- ☐ **Marine (40)**
- ☒ **Hazard (3)**
  - ☒ Ashfall Watch
  - ☒ Ashfall Warning
  - ☒ Ashfall Advisory
- ☒ **Fire (4)**
  - ☒ Fire Weather Watch
  - ☒ Red Flag Warning
  - ☒ Fire Weather Advisory
  - ☒ Fire Warning
- ☒ **Non-Precipitation (30)**
- ☒ **Severe (6)**
- ☒ **Tsunami (3)**
- ☒ **Tropical (16)**
- ☒ **Wind (15)**
- ☒ **Flood (18)**
- ☒ **Winter (40)**

☐ **City of Santa Clarita**

**Weather and Hazard Alerts Settings**

☐ Don't contact me between:

09:00 PM and 08:00 AM

Please select...

[Save & Continue >](#) [Skip this](#)

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The Information page is displayed. Select your information, as needed. Then, select Save & Continue.

The screenshot shows the Everbridge Member Portal interface. At the top left is the Everbridge logo. Below it, a dark grey navigation bar contains the text "Welcome AFKajimoto" and a "Logout" link. A blue button labeled "? Help & Answers" is positioned to the left of the main content area. The main content area features a horizontal breadcrumb trail with five steps: "Profile", "Locations", "Alerts", "Information" (which is highlighted with a dark grey background), and "Review". Below the breadcrumb trail is the heading "My Information". The form contains four sections: "Department" with two radio button options, "Building Number" with a text input field, "Location Type" with a text input field, and "Company" with two radio button options. At the bottom of the form are two buttons: "Save & Continue >" (blue) and "Skip this" (grey).

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Welcome AFKajimoto [Logout](#)

? Help & Answers

Profile Locations Alerts **Information** Review

### My Information

Department

☐ Engineering

☐ Quality Assurance

Building Number

Location Type

Company

☐ Everbridge, Inc.

☐ Mass Notification Group

Save & Continue > Skip this



The Review page is displayed. If needed, you can click Edit in any pane to change the information.

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Welcome AFKajimoto [Logout](#)

[? Help & Answers](#)

Profile Locations Alerts Information **Review**

## Review the information you entered

You will be able to edit it any time.

### My Profile [Edit](#)

Username: AFKajimoto

First Name: Allison

Last Name: Kajimogto

Registration Email: afkajimoto@hotmail.com

Primary email: afkajimoto@hotmail.com

Primary Day phone: 6619938074

### My Alert Subscriptions [Edit](#)

135 Weather Alerts

### My Locations [Edit](#)

Work: 699 Exposition Blvd

### My Information [Edit](#)

[Finish](#)

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Click Finish when done. The following message on your Home Page is displayed: “Success! Your profile has been created.” Remember to edit My Locations to add one or more locations you care about.

The screenshot displays the Everbridge Member Portal Home Page. At the top left is the Everbridge logo. Below it, a dark navigation bar contains the text "Welcome AFKajimoto" and a "Logout" link. On the right side of this bar are links for "Home", "Overview", and "FAQs". Below the navigation bar, a blue button labeled "? Help & Answers" is on the left. A green success message box in the center reads: "Success! Your profile has been created." The main content area features four white boxes, each with a title and an "Edit" link:

- My Profile** (Edit):
  - Username: AFKajimoto
  - First Name: Allison
  - Last Name: Kajimoto
  - Registration Email: afkajimoto@hotmail.com
  - Primary email: afkajimoto@hotmail.com
  - Primary Day phone: 6619938074
- My Alert Subscriptions** (Edit):
  - 135 Weather Alerts
- My Locations** (Edit):
  - Work: 699 Exposition Blvd
- My Information** (Edit):

The footer of the page is dark and contains the text: "Powered by everbridge" with the logo, followed by links for "Terms of Use" and "Privacy Policy". Below this is the copyright notice: "© 2014 Everbridge, Inc. V3.1.0-2014-07-23 01:52:59".





# Login Page

Type your text to be used on the Login Page of the Member Portal. The following example shows sample text.

Settings ?

Organization Member Portal

Access Your Portal https://ssp-qa1.everbridge.net/index/8800387990194

Portal Options

- Information Collection
- Content
- Banner
- Sign Up
- Login
- Review
- Overview
- FAQ

**Login**

## Emergency Alert Program

Get alerted about emergencies and other important community news by signing up for our Emergency Alert Program. This system enables us to provide you with critical information quickly in a variety of situations, such as severe weather, unexpected road closures, missing persons and evacuations of buildings or neighborhoods.

You will receive time-sensitive messages wherever you specify, such as your home, mobile or business phones, email address, text messages and more. You pick where, you pick how.

[Help & Answer text](#)

Save

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When members first launch the URL to the Member Portal, they see this text on the Login Page. In the following example, the sentence “<sample text only - not suggested for distribution>” was removed from the default text.

The screenshot shows the Everbridge Member Portal login page. At the top is the Everbridge logo. Below it is a navigation bar with links for Login, Sign up, Overview, and FAQs. A blue button labeled '? Help & Answers' is on the left. The main heading is 'Emergency Alert Program'. Below this is a paragraph explaining the program's purpose. Another paragraph states that users will receive time-sensitive messages. The central focus is a 'Login to your account' form with fields for Username (labeled 'User Name') and Password, each with a 'Forgot' link. There is a checkbox for 'Keep me signed in' and a 'Login' button. A link for 'Sign up' is provided for users without an account. The footer contains the text 'Powered by Everbridge' with links to 'Terms of Use' and 'Privacy Policy', and a copyright notice for 2014.

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[Login](#) [Sign up](#) [Overview](#) [FAQs](#)

? Help & Answers

## Emergency Alert Program

Get alerted about emergencies and other important community news by signing up for our Emergency Alert Program. This system enables us to provide you with critical information quickly in a variety of situations, such as severe weather, unexpected road closures, missing persons and evacuations of buildings or neighborhoods.

You will receive time-sensitive messages wherever you specify, such as your home, mobile or business phones, email address, text messages and more. You pick where, you pick how.

### Login to your account

**Username** [Forgot username](#)

  
**Password** [Forgot password](#)

☐ Keep me signed in (Uncheck if on a shared computer)

Don't have an account? [Sign up](#)

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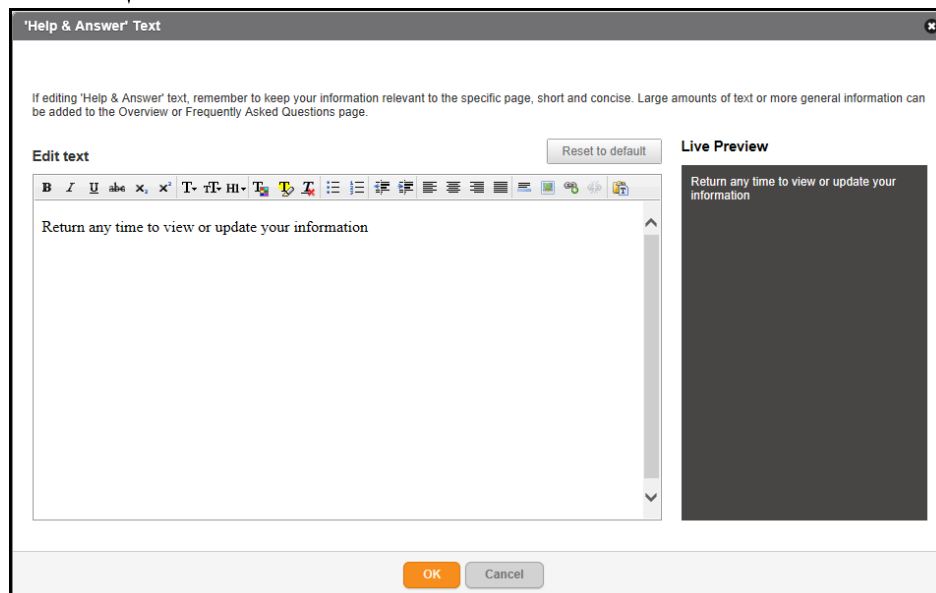
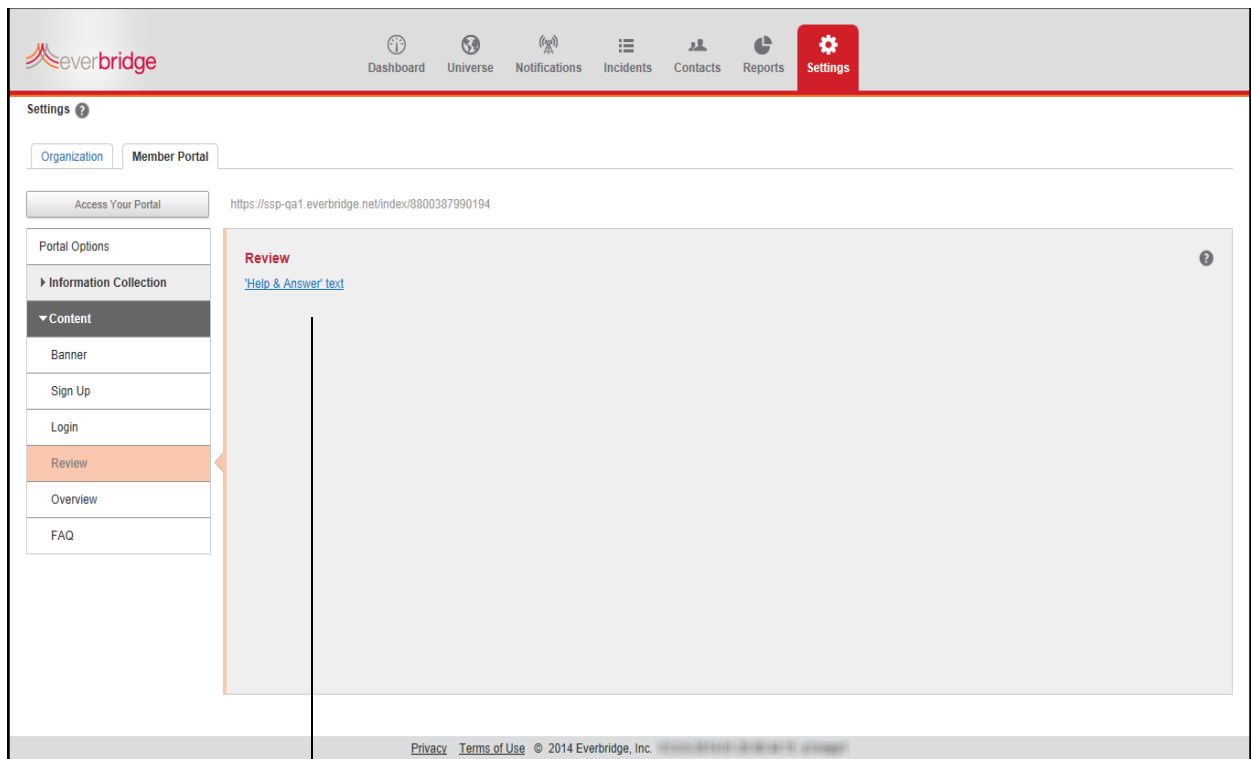
**NOTE:** Usernames are a minimum of four characters, contain a combination of uppercase letters, lowercase letters, numbers, dash (-), underscore (\_), at sign (@), or period (.).

Passwords are case sensitive, and may contain uppercase letters, lowercase letters, numbers or symbols.



# Review

You can review and edit your Help & Answer text here.





## Overview

Type your text to be used on the Overview page of the Member Portal. The following example shows sample text.

The screenshot shows the Everbridge Member Portal Settings page. The top navigation bar includes links for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, and Settings (highlighted in red). The left sidebar contains a 'Settings' section with tabs for Organization and Member Portal. Under Member Portal, there are links for Access Your Portal, Portal Options, Information Collection, Content (expanded), Banner, Sign Up, Login, Review, Overview (highlighted), and FAQ. The main content area is titled 'Overview' and contains a rich text editor with the following text: 'Notification Program Overview' and 'We have launched a new Mass Notification service that allows us to alert you. You opt-in to enter your contact information and subscribe to notification you care about based on your location. The information you provide is protected and will not be used for any other purpose.' A 'Save' button is located at the bottom of the editor.

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Dashboard Universe Notifications Incidents Contacts Reports Settings

Settings ?

Organization Member Portal

Access Your Portal <https://ssp-qa1.everbridge.net/index/8800387990194>

Portal Options

Information Collection

Content

Banner

Sign Up

Login

Review

Overview

FAQ

**Overview**

**Notification Program Overview**

We have launched a new Mass Notification service that allows us to alert you. You opt-in to enter your contact information and subscribe to notification you care about based on your location. The information you provide is protected and will not be used for any other purpose.

Save



When the user accesses the Member Portal URL, the Overview link is displayed on the upper right-hand area of the login page.

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[Login](#) [Sign up](#) [Overview](#) [FAQs](#)

[? Help & Answers](#)

## Emergency Alert Program

Get alerted about emergencies and other important community news by signing up for our Emergency Alert Program. This system enables us to provide you with critical information quickly in a variety of situations, such as severe weather, unexpected road closures, missing persons and evacuations of buildings or neighborhoods.

You will receive time-sensitive messages wherever you specify, such as your home, mobile or business phones, email address, text messages and more. You pick where, you pick how.

### Login to your account

**Username** [Forgot username](#)

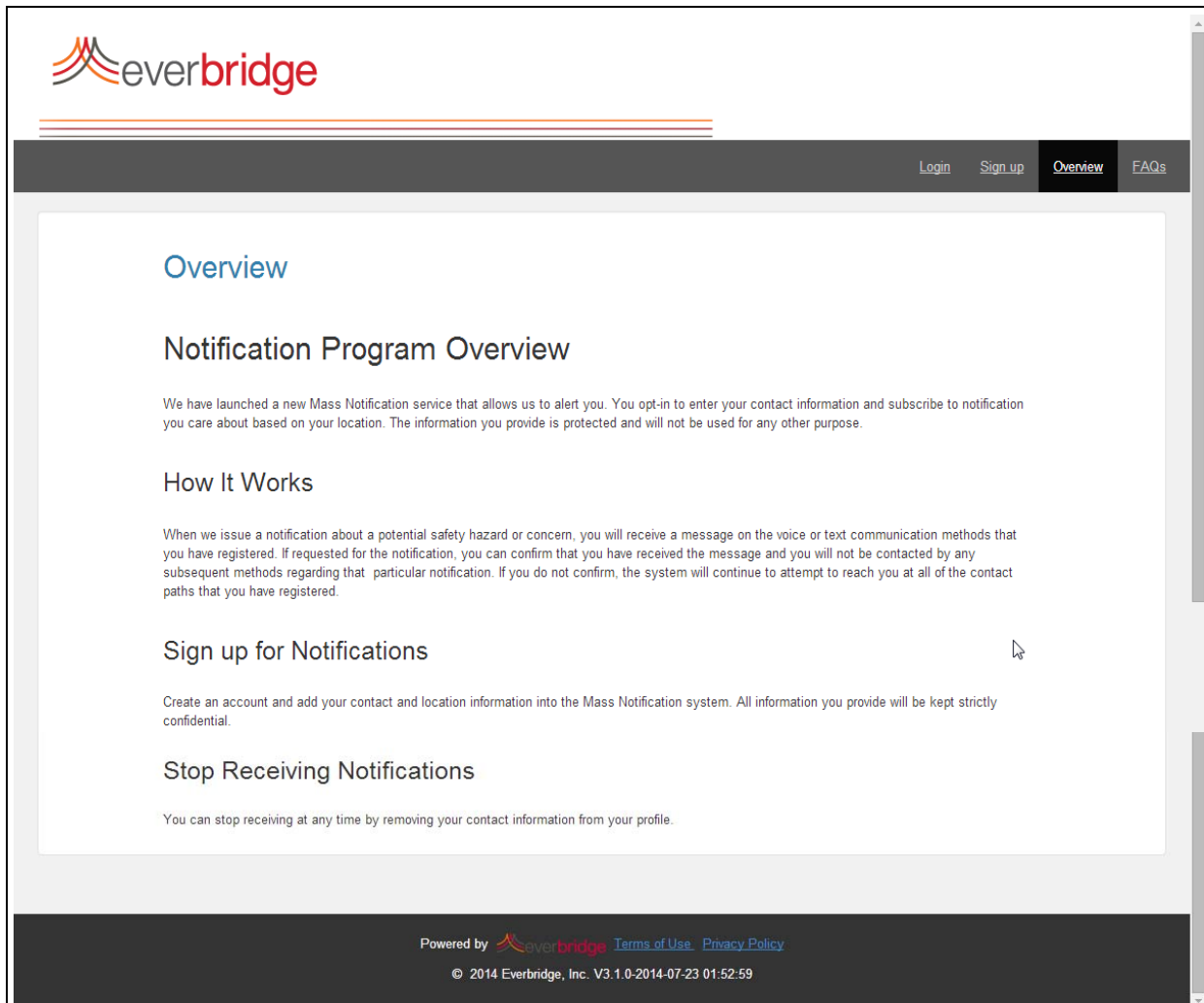
**Password** [Forgot password](#)

☐ Keep me signed in (Uncheck if on a shared computer)

[Login](#)



Click the Overview link to display the customized overview page of the Member Portal. In the following example, the sentence “<sample text only - not suggested for distribution>” was removed from the default text.



The screenshot displays the Everbridge Member Portal's Overview page. At the top left is the Everbridge logo. A dark navigation bar on the right contains links for Login, Sign up, Overview (which is highlighted), and FAQs. The main content area has a light gray background and features the following sections:

- Overview**: A blue heading.
- Notification Program Overview**: A section header followed by a paragraph: "We have launched a new Mass Notification service that allows us to alert you. You opt-in to enter your contact information and subscribe to notification you care about based on your location. The information you provide is protected and will not be used for any other purpose."
- How It Works**: A section header followed by a paragraph: "When we issue a notification about a potential safety hazard or concern, you will receive a message on the voice or text communication methods that you have registered. If requested for the notification, you can confirm that you have received the message and you will not be contacted by any subsequent methods regarding that particular notification. If you do not confirm, the system will continue to attempt to reach you at all of the contact paths that you have registered."
- Sign up for Notifications**: A section header followed by a paragraph: "Create an account and add your contact and location information into the Mass Notification system. All information you provide will be kept strictly confidential."
- Stop Receiving Notifications**: A section header followed by a paragraph: "You can stop receiving at any time by removing your contact information from your profile."

The footer is a dark gray bar containing the text "Powered by" followed by the Everbridge logo, and links for "Terms of Use" and "Privacy Policy". Below this is the copyright notice: "© 2014 Everbridge, Inc. V3.1.0-2014-07-23 01:52:59".



## FAQs Page

Type your text to be used on the FAQs page on the Member Portal. The following example shows sample text.

The screenshot displays the Everbridge Settings interface. At the top, a navigation bar includes links for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, and Settings (highlighted in red). Below this, the 'Settings' section is active, with tabs for 'Organization' and 'Member Portal'. The 'Member Portal' tab is selected, showing a URL: <https://ssp-qa1.everbridge.net/index/8800387990194>. On the left, a sidebar lists 'Portal Options' including Information Collection, Content (expanded), Banner, Sign Up, Login, Review, Overview, and FAQ (highlighted in orange). The main content area, titled 'FAQ', features a rich text editor with the following text: 

### Emergency Alert Program: Frequently Asked Questions

**What is the Emergency Alert Program?**

This service allows you to opt-in to receive notifications via phone calls, text messaging, e-mail and more based on locations you care about. You can choose to receive notifications about events that may affect your home, workplace, family's schools and more.

**When will it be used?**

A 'Save' button is located at the bottom of the editor.



The FAQs link is displayed on the upper right-hand corner of all Member Portal pages.

The screenshot displays the Everbridge Member Portal interface. At the top left is the Everbridge logo. Below it, a dark navigation bar contains links for [Login](#), [Sign up](#), [Overview](#), and [FAQs](#). A blue button labeled [? Help & Answers](#) is positioned on the left side of the main content area. The main heading is "Emergency Alert Program". Below this, a paragraph states: "Get alerted about emergencies and other important community news by signing up for our Emergency Alert Program. This system enables us to provide you with critical information quickly in a variety of situations, such as severe weather, unexpected road closures, missing persons and evacuations of buildings or neighborhoods." Another paragraph follows: "You will receive time-sensitive messages wherever you specify, such as your home, mobile or business phones, email address, text messages and more. You pick where, you pick how." Centered on the page is a "Login to your account" form. It includes fields for "Username" (with a [Forgot username](#) link) and "Password" (with a [Forgot password](#) link). Below these fields is a checkbox labeled "Keep me signed in (Uncheck if on a shared computer)" and a blue "Login" button. An arrow from the text above points to the [FAQs](#) link in the top right navigation bar.





Click the FAQs link to display the Frequently Asked Questions and answers. In the following example, the sentence "<sample text only - not suggested for distribution>" was removed from the default text.

**FAQs**

## Emergency Alert Program: Frequently Asked Questions

### What is the Emergency Alert Program?

This service allows you to opt-in to receive notifications via phone calls, text messaging, e-mail and more based on locations you care about. You can choose to receive notifications about events that may affect your home, workplace, family's schools and more.

### When will it be used?

This system will be used to notify you about imminent threats to health and safety as well as informational notifications that affect your locations or work environments. Administrators will send notifications regarding severe weather, flooding, gas leaks, police activity and more.

### Will I still get emergency notifications if I don't sign up?

If you don't create a username and password, you will receive notifications only by the methods that are on file for your Organization.

### What if my phone number or email address changes?

The system is only as good as the information you provide. If your contact information changes, you can always visit your profile and update your information.

### Will my contact information be shared with others?

No. The information that you provide will be used only for this Organization for notification purposes. We will not give or sell your contact or location information to any vendor or other organization.

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# Password and Session Expirations

This appendix provides a quick reference of the Everbridge Suite password and session expirations.

**The following topics are covered:**

- ◆ *Password and Session Expirations*



# Password and Session Expirations

The following table lists the password expiration and session timeouts for Everbridge Suite.

**NOTE:** The Password Expiration and Session Timeout time frames are currently a platform setting and cannot be customized for an account or organization.

	Password Expiration	Session Expiration
Manager Portal	Every 90 Days  Users are prompted to enter re-enter their current password and enter a new password. (The new password cannot be any of the past three passwords.) If users change their password during the 90-day period, the counter resets to zero (0) and starts a new 90-day cycle.	After 30 minutes of inactivity.
Member Portal	<ul style="list-style-type: none"><li>None if member record is not linked to user record.</li><li>90 Days if member record is linked to user record. If users change their password during the 90-day period, the counter resets to zero (0) and starts a new 90-day cycle.</li></ul>	After 30 minutes of inactivity.
Mobile Manager App	Every 90 Days.  If a user's password expires, then a message instructs the user to change his/her password in the Manager portal.	After 30 minutes of inactivity.
Mobile Member App	<ul style="list-style-type: none"><li>None if member record is not linked to user record.</li><li>90 Days if member record is linked to user record. If users change their password during the 90-day period, the counter resets to zero (0) and starts a new 90-day cycle.</li></ul> <p><b>NOTE:</b> If Mobile Members see any of the following codes, then they must either contact their Administrator or attempt to log into the Mobile Member app:</p> <ul style="list-style-type: none"><li>Client Account disabled (Code: 11031)</li><li>User disabled (Code: 11039)</li><li>Organization disabled (Code: 11033)</li><li>No member path in Org (Code: 20000)</li><li>Password expired (Code: 11032)</li><li>Temp password cannot login (Code: 11034)</li><li>No Member product (Code: 1000)</li><li>Token expired (Security Policy) (Code: 401)</li></ul>	After 90 days.

# Upload and Download Guidelines for Non-English Languages

This appendix provides information for implementations using non-English languages when uploading and downloading contacts.

**The following topics are covered:**

- ♦ *Overview*
- ♦ *UTF-8 no BOM Encoding*
- ♦ *Glossary of Terms*



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## Overview

The purpose of this appendix is to provide an understanding of UTF-8, BOM (Byte Order Mark), and why Everbridge uses "UTF-8 no BOM" encoding for Contact CSV files.

You can continue to use Microsoft Excel, Microsoft Windows Notepad, or any other Microsoft (or third-party) product to save your CSV files as long as you are using the Latin character set (English).



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# UTF-8 no BOM Encoding

Everbridge uses the most widely used file encoding scheme, known as UTF-8, when uploading/importing and downloading/exporting Organization Contact files in CSV format. Using the UTF-8 encoding scheme allows the inclusion of non-Latin (non-English) characters in the files. This allows customers to use Arabic, Chinese, Japanese, or any other language in their Organization's Contacts names.

## Downloading/Exporting

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

## Uploading/Importing

Things become a little tricky here-especially if you are accustomed to using Microsoft products, such as Excel or Notepad, to build/save your CSV files. Although Excel can read/open UTF-8 encoded files, it will not save CSV files as UTF-8<sup>1</sup> (it saves using an encoding known as Windows-1252 or something similar depending on the language settings of your Windows installation). Because of this deficiency, any non-Latin characters in the saved file will be lost (that is, opening the file again will show garbage characters in place of the non-Latin characters). Notepad, which ships with all Windows versions, has an Encoding option in the Save As dialog box, and appears to support "UTF-8". However, this is a slightly different variation of the commonly used UTF-8, known as UTF-8 with BOM. Because of this variation, uploading a CSV file that is encoded using UTF-8 with BOM will not work: the file upload may succeed, but there is no guarantee that the non-Latin characters will be imported correctly. Because of these Microsoft product constraints on UTF-8 encoding, customers should not use Excel or Notepad to save a CSV file if it contains non-Latin characters as part of the Contacts' fields such as the name, address, and so forth. Instead, customers should use applications that support the commonly used UTF-8 encoding, also known as "UTF-8 with no BOM", to save their CSV files. Some examples of such applications include Notepad++, OpenOffice (currently supported by Apache), and Google Docs.

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



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## Glossary of Terms

**ASCII** (American Standard Code for Information Interchange) is a code for representing English characters as numbers, with each letter assigned a number from 0-127.

**Unicode** is an international encoding standard for use with different languages and scripts, where each letter, digit, or symbol is assigned a unique number ("code points") for every character. This includes characters from nearly all languages, plus many other characters such as mathematical symbols. There are many ways to encode Unicode strings as bytes, such as UTF-8 and UTF-16.

**UTF-8** (8-bit Unicode Transformation Format) and **UTF-16** (16-bit Unicode Transformation Format) are variable-length character encoding for Unicode. UTF-8 uses 1-4 bytes for each value (so, for the first 128 characters, UTF-8 is identical to ASCII) and UTF-16 uses 2 or 4 bytes. UTF-8 was designed for backward compatibility with ASCII and to avoid the complications of endianness (how bytes are ordered within computer memory) and byte order marks (BOMs) in UTF-16 and UTF-32.

Again, for every character that has an ASCII value, the Unicode code point and the ASCII value of that character are the same. You should prefer to use Unicode strings rather than ASCII, to allow you to have accented characters and to localize your interface to languages other than English.

A **Non-ASCII character** is a character that does not match any of the 128 code points in the ASCII character set. Non-ASCII characters include 8-bit characters and multibyte characters.

A **Multibyte character** is a character that might require from 2-4 bytes of storage. If a language contains more than 256 characters, the code set must contain multibyte characters. With a multibyte code set, an application cannot assume that one character requires only 1-byte of storage.

**BOM** indicates that the byte order is determined by a byte order mark, if present at the beginning of the data stream (packets of data). For UTF-8, the byte order is not applicable. In general, "UTF-8 no BOM" is the common and expected behavior of a UTF-8 file. Most non-Windows applications refer to this format as "UTF-8" and save the file without a BOM. Microsoft, however, appends a BOM when saving with UTF-8 encoding, so other Windows applications (like Excel) add BOMs to UTF-8 files by default.



# G L O S S A R Y

## Glossary

This Glossary is provided as a reference for common terms and acronyms, and their definitions as used within the Everbridge Suite system.

<b>event</b>	All of the notifications in an event are grouped together to make it convenient to see them in one place. You could have the initial notification about something like a fire, an update, and an all clear. When notifications are part of the same event, some of the statistics are summed over all the notifications in the event.
<b>geo-code</b>	When an address is entered, the system begins geo-coding that address to its longitude and latitude. If you enter your own latitude and longitude, the system does not verify the accuracy. If your organization is not using geo-coding, enter 00 in both the latitude and longitude fields or do not enter an address.
<b>hashtag</b>	A word or phrase prefixed with the symbol #, It is the Twitter practice of tagging an individual tweet by using a hash in front of the tag. For example, putting the hashtag #flu in a tweet about the flu.
<b>message</b>	A message could be about an emergency situation, such as a hurricane warning, or a serious problem such as "there is a wildfire west of the I-295." The message could also be just a regular part of doing business, such as "We need three people to work second shift." The message is delivered in various delivery formats: If the message is delivered to a voice device like a phone or mobile phone, it is played as a voice message; if the message is delivered to a text device, like email, it arrives as a text message; and if the message is going to email, it can have data attached as a file.



<b>metadata</b>	Data about the content on the page. Examples of metadata are as follows: the date and time a notification was sent, when the notification was last updated, and/or closed.
<b>notification</b>	A notification is the sending of a message to a contact for some specified number of cycles.
<b>rebroadcast</b>	After a notification has ended, the Stop button is replaced by a Rebroadcast button. A rebroadcast resends the original message to contacts who have not confirmed receiving it. From the Incidents tab, however, you would send an update on the incident, not a rebroadcast.
<b>SMS address</b>	An acronym for Short Message Service, the SMS address is usually the 10-digit phone number of the mobile phone.
<b>SMTP</b>	An acronym for Simple Mail Transfer Protocol. Email formats must in SMTP format, Username@domain.
<b>threshold</b>	A defined situation on which you want your contacts to be alerted or notified.
<b>widget</b>	An application, or component of an interface, that enables a user to perform a function or access a service.