



Asset Management Migration Guide

Everbridge Suite

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Critical Event Management
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About Asset Management

What is Asset Management?

Asset Management lets you create and manage assets — buildings, people, suppliers, and other locations important to your organization — in a single place in the Everbridge Suite Manager Portal. Migrating your Visual Command Center asset management to Asset Management lets you take advantage of the capabilities available in the platform.

Benefits of Asset Management

Managing assets through the new service will allow you to:

- Manage assets in a single location.
- Manage your assets through the UI, SFTP, or APIs.
- Add or update individual assets through the user interface.
- Receive email notifications when an upload is complete.
- Review results of uploads through the Manager Portal.
- Download existing assets in a .csv file.

Not included in the Asset Management

After your organization transitions to Asset Management, the following types of assets will still be managed in Visual Command Center:

- Supply chain assets (routes, stops, O-D pairs)
- Indoor assets (alarms, cameras, other locations on a floor plan)
- Floor plans

If your Buildings have not been migrated, you will continue to manage them in Everbridge Manager Portal, under Settings > Map > Manage Buildings.

Preparing Your Upload Files

The most significant difference you will find in migrating is that the format of the asset upload files has changed. For standard (not custom) attributes, column headers in the new files are slightly different from the headers in files you may be using now.

If you have .csv files that you use for uploading assets to Visual Command Center, you can use them with Asset Management, by doing one of the following:

- In Manager Portal, map the headers in your .csv files to the new header names.
- Change the headers in your upload file.

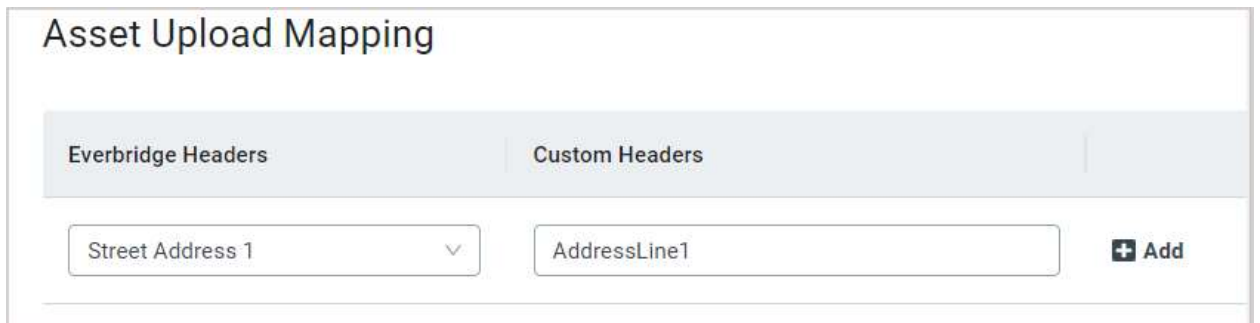
Whichever option you use, note that:

- Columns can be in any order in the upload file.
- Only the External ID and Name values are required.
- You may leave a system attribute column out of the upload file if your organization does not use that attribute. For example, the *Icon* column is reserved for future use and may be left out of your upload files.
- If a column is in the upload file but a cell is empty, the attribute value is made blank. For example, if the *Category* column is left empty for an asset, any existing value for that attribute will be overwritten and the existing value removed. By contrast, if the *Category* column is left out of the upload file, existing values for the attribute are not affected.

Mapping headers from existing files to the new format

1. Under Settings > Organization, expand the menu under Contacts/Assets.
2. Select **Asset Upload Mapping**.
3. Under Everbridge Headers, click in the field to display the list of column headers used by Asset Management and select the one you want to map. For example, if your upload file includes a column named AddressLine1, select the comparable Everbridge Header Street Address 1.

See the **table of Upload File Changes** in the next section for a list of the mappings you need to create. You do not need any mappings for your custom attributes.



4. Under Custom Headers, enter the column name from your upload file.
5. Click the **+Add** link on the right to save the mapping.

Change the headers in your upload files

Instead of mapping your existing column headers to the new file format, you may choose to change the headers in the files you use to upload assets to Visual Command.

The changes you will need to make to column headers are summarized in the tables that follow.

Visual Command Center Assets – Upload File Changes

VCC Import	Asset Management Import	Change needed
ExternalID	External ID	<i>Change column name</i>
Label	Name	<i>Change column name</i>
Category	Category	
	Notes	
	Icon	<i>Ignore column</i>
Country	Country	
AddressLine1	Street Address 1	<i>Change column name</i>
AddressLine2	Street Address 2	<i>Change column name</i>
City	City	
State	State	
Postalcode	Postal Code	<i>Change column name</i>
ProviderStartTime	Start Time	<i>Change column name</i>
ProviderEndTime	End Time	<i>Change column name</i>
Geometry	Geometry	
Latitude	Latitude	
Longitude	Longitude	

Note: The *Icon* column does not apply for Visual Command Center assets; you can select icons for your assets in the Admin Console on the Feeds page. Leave the Icon column in your upload files.

Changes to the SFTP upload process

Asset Management introduces some changes to the SFTP folder structure that you will want to review before you upload assets. On the server, uploads will go to a new directory called “cem_asset.” Within this directory, use the following subfolders as destinations for your asset data file:

Subfolder: **Update**

- Adds any new assets found in the upload file. An asset is new if its External ID does not match any existing record.
- Updates assets already in the system with values from the file. An asset is updated when its External ID in the file matches an existing record.
- Nothing is deleted.

Subfolder: **Replace**

- Adds any new assets found in the upload file. An asset is new if its External ID does not match any existing record.
- Updates assets already in the system with values from the file. An asset is updated when its External ID in the file matches an existing record.
- Deletes assets from the system if they are not in the upload file. An asset is deleted when no entry with a matching External ID is included in the upload file.

NOTE: The upload file name is case sensitive, and file size limit is increased to 100MB. The file name should start with the Asset Type name, followed by the suffix directly (for example, Offices.csv), or with the Asset Type name, followed by the triple underscore and additional characters (for example, Offices___1.csv).

What to expect on the migration date

On the date of your organization’s migration to Asset Management, do not have any asset uploads in progress through the Visual Command Center Admin Console or via SFTP.

After the migration begins, changes will take approximately 30 minutes to complete. After completion, you will see changes in VCC and the Manager Portal, described below.

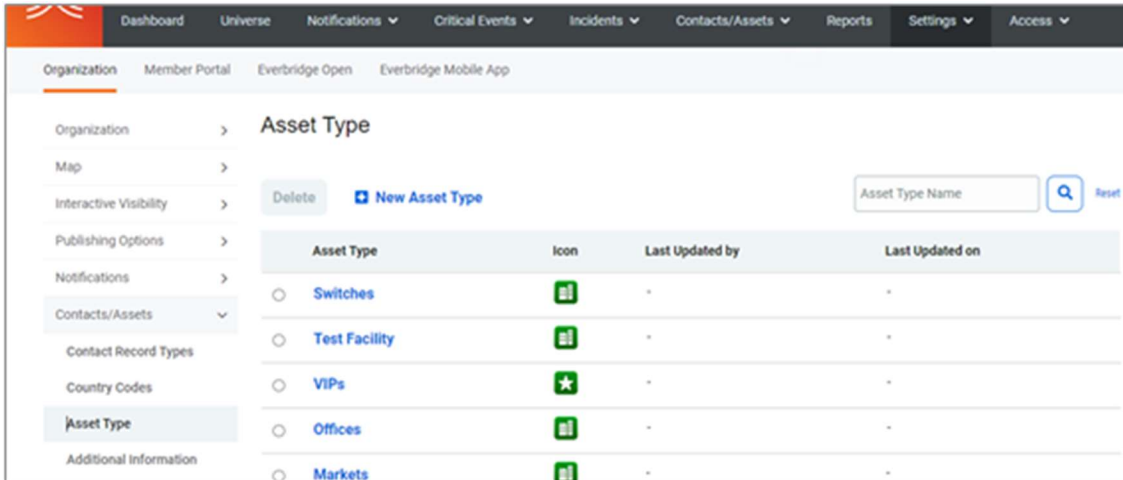
Review changes to existing assets and asset types

When Asset Management is enabled for your organization, asset types that your organization currently manages through the Visual Command Center Admin Console are automatically transferred to Asset Management. No actions on your part are required.

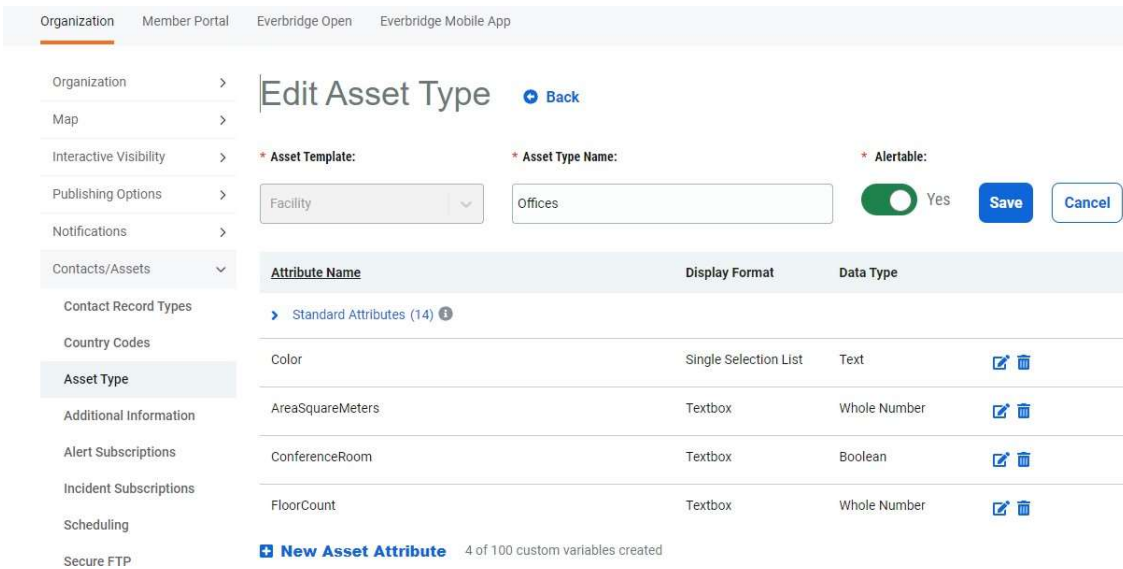
After Asset Management is enabled, you can review your migrated assets and asset types

by following the steps below. To review the migrated asset types::

1. From Settings > Organization > Contacts/ Assets , select Asset Type.



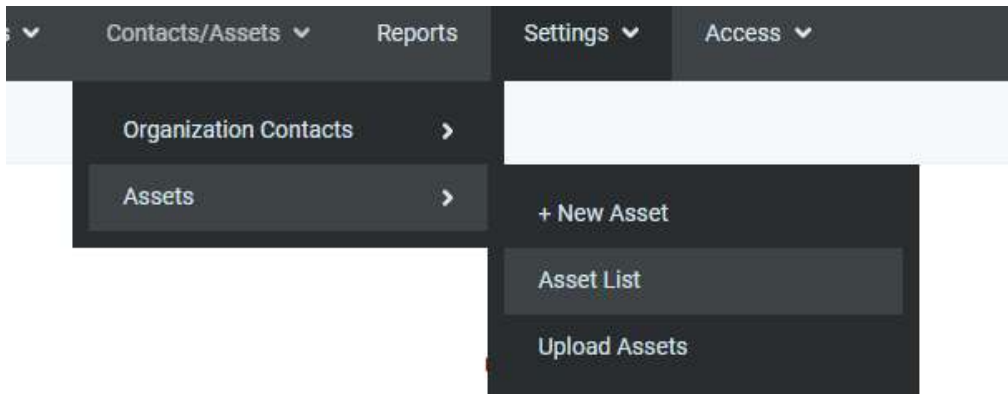
1. Review the list of asset types that have migrated from VCC.
2. Select any asset type to review its attributes.



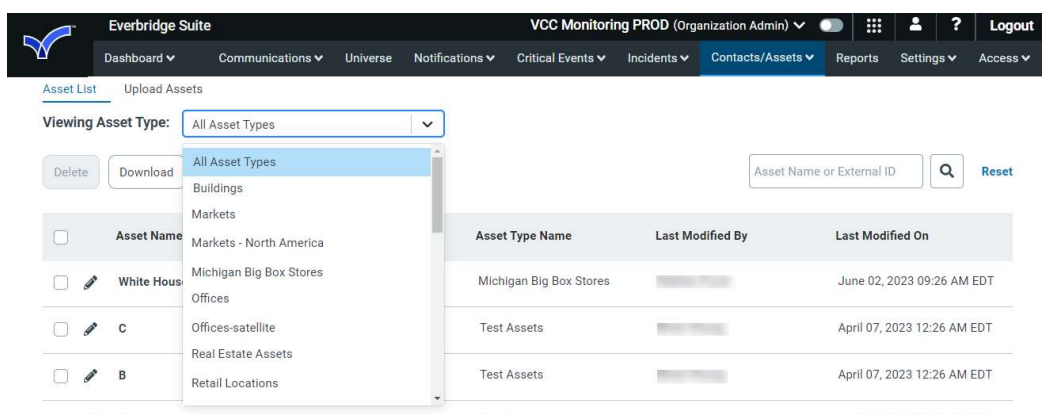
3. Each asset type has a list of standard attributes.
4. Custom attributes that you added through VCC are listed below the standard attributes.

To review the migrated assets:

1. Navigate to Contacts/ Assets > Assets > Asset List.



2. Select any asset type to review the list of migrated assets.



3. Open Visual Command Center and view your existing assets in the Operator Console.

Changes in Visual Command Center

After Asset Management is enabled for your organization, you will notice several changes in the Admin Console. These require no action on your part.

- Your custom asset types no longer appear on the Data page; management of asset types and asset uploads moves to the Manager Portal. You will continue to use the Data page for:
 - Managing user-added KML files.
 - Enabling and disabling alerting for supply chain assets.
- A new Asset Management page is added where your custom asset types are listed. On this page, you can select the attributes to display in the Visual Command Center card view, list view, and tooltips. Your existing attribute settings are automatically migrated here when your organization moves to Asset Management.
- All settings related to how assets are shown on the map, such as icons, colors, zoom levels, filters, permissions, remain on the Feeds page.
- Links at the top of some Admin Console pages have changed; the *Manage Data Settings* links now take you to the Asset Types page in the Manager Portal.

Are There Instructions for Managing Assets in Asset Management?

Everbridge provides detailed instructions for managing contacts and assets in the online help system and the Everbridge Support Portal at [https:// support.everbridge.com/](https://support.everbridge.com/).

Below are some quick instructions for performing some common actions with the new Asset Management.

How do I add an Asset Type?

You must create an Asset Type before you can enter or upload assets in your organization. To do this:

1. From Settings > Organization > Contacts/ Assets , select Asset Type.
2. Click **New Asset Type**.
3. From the drop-down menu, select the desired Asset Template. Each Asset Template creates a type with a specific set of standard attributes.
4. Type a name for your new asset type and click Save.

How do I add a new custom attribute to an asset type?

To create a new custom attribute to an asset type:

1. From Settings > Organization > Contacts/ Assets, select Asset Type. Select one of your asset types.
2. Below the list of standard assets, click New Asset Attribute.
3. Enter a name for the attribute.
4. Select a display format and data type.
5. Optionally, add help text. This text appears when a user is entering a value for this attribute in the UI.

How do I add an individual asset through the User Interface in the Manager Portal?

1. Navigate to Contacts/ Assets > Assets. Click New Asset.
2. Fill in the fields.
 - Required fields are indicated with a red asterisk (*).
 - Standard attributes appear on the left side of the screen, and your custom attributes appear on the right.
3. Under Geometry in the lower left of the screen, select the type of location:
 - For a point location, select Geometry Coordinates. If you have entered an address, you can select it from the Suggested Address drop-down menu.

Enter latitude and longitude values in the fields.

- For a polygon, select Geometry Boundary. Click Select on map; navigate to the location and use the drawing tools to draw your polygon.

4. Click Save when done.

How do I create a file for uploading assets?

To create a file for uploading assets:

1. Select Contacts/ Assets > Assets > Upload Assets.
2. Click Download Template.
3. Select the asset type from the drop-down menu.
4. A .csv file with the columns for the selected asset type is downloaded. Open this file and enter your asset information.

Where do I upload a .csv file in the Manager Portal?

To upload a .csv file in the Manager Portal:

1. Select Contacts/ Assets > Assets > Upload Assets.
2. Click Upload. The *Upload Assets* dialog appears.
3. Select the desired Asset Type from the drop-down menu. Click Select a File.
4. Select one of the following options:
5. Update Replace Done
6. Hover over the Upload Options Help link for more information.
7. Click Upload.