



Getting Started: Creating Advanced Alert Workflows with CEM Orchestration

Everbridge Suite

July 2023

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Everbridge Suite
2023
Printed in the USA.

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

What is CEM Orchestration?

CEM Orchestration lets you manage alerting and automated communications to respond to Risk Events that affect people and assets. With Orchestration, you can set alerting thresholds and create rules and workflows to meet a wide variety of use cases.

This Guide

The Getting Started guide shows you how to access Orchestration and how to create workflows to meet some typical use cases. For a complete guide to all Orchestration options, see the Everbridge online help system.

Managing Alert Settings

With the release of CEM Orchestration, you can choose between two ways to manage your alert settings, or you can combine the two to address your organization's specific needs. The two options are:

1. **Basic Alert Settings** use the familiar Visual Command Center Admin Console interface, to provide quick access to the most used settings, including event category and subcategory, severity, impact radius, and auto Incident Notifications.
2. **Advanced Alert Settings** are available in the Manager Portal and allow you to create workflows to address more complex and nuanced use cases.

You can also combine these methods, using basic settings for most of your alert configuration, while creating advanced workflows for specific risk sources or categories.

When to Use Basic Alert Settings

The **Basic Alert Settings** in the Admin Console have not changed with the release of Orchestration. Using these settings, you can still:

- Specify a severity threshold and impact radius for each event category and subcategory for each risk source.
- Enable "Always Alert" for a category or subcategory in a risk source.
- Enable sending an automatic incident notification for each category or subcategory in a risk source.

When to Use Advanced Alert Settings

You will need to use the **Advanced Alert Settings** when:

- You want to vary the impact radius for events of the same type with differing severities (e.g., set a wider radius for a more severe earthquakes).
- You need to set different thresholds depending on the type of contacts or assets affected (e.g., alert on severe civil unrest events within one mile of factories, but alert on civil unrest of all severities within 10 miles of laboratories).
- You need to send different automatic notifications to different audiences for the same alert (e.g., send a notification of a shooting to all contacts within two miles of the event, and a separate notification with instructions to contacts in your Building Security group).

For instructions on setting up advanced workflows and examples of workflows for advanced use cases, see the sections [Creating Advanced Workflows](#) and [Advanced Alerting Workflow Examples](#).

Status	Name	Sources	Last Modified By	Last Modified On			
On	HAZMAT/Fire	Anvil (New), Breaker, ...	Orchestration Engine ...	October 28, 2022 2:1...	🔔	⬇️	🗑️
On	Conflict/War	Anvil (New), Breaker, L...	Orchestration Engine ...	October 28, 2022 2:1...	🔔	⬇️	🗑️
On	Natural Disaster	Anvil (New), Breaker, ...	Orchestration Engine ...	October 28, 2022 2:1...	🔔	⬇️	🗑️
On	Tornado	Weather Events (Aust...	Orchestration Engine ...	October 28, 2022 2:1...	🔔	⬇️	🗑️
On	Earthquake	Earthquake (USCS)	Orchestration Engine ...	October 28, 2022 2:1...	🔔	⬇️	🗑️

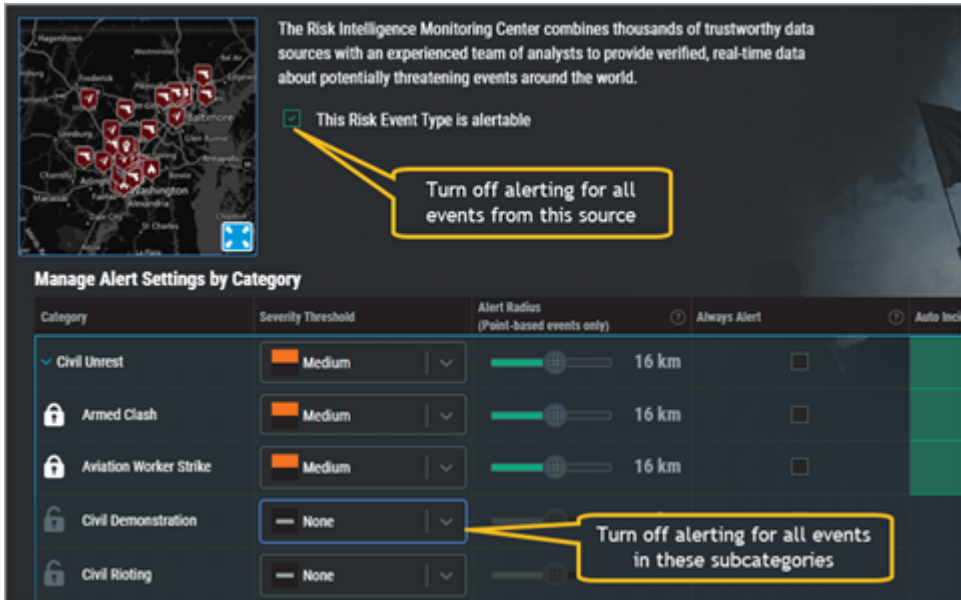
Using Basic and Advanced Settings Together

You may find that while Basic Alert Settings satisfy most of your Organization's needs, one or more use cases require Advanced Alert Settings. In this case:

1. Create a workflow that addresses your advanced use case in the Manager Portal Orchestration page. Note which risk event sources, categories, and subcategories are included in the workflow.
2. Turn the workflow on.



3. To ensure that you get alerts only for the conditions in your Orchestration workflows, in the Visual Command Center Admin Console, turn alerting off for the risk event sources, categories, and subcategories that are covered by the workflow.



NOTE: For now, two feeds (**Operator Entered Risks** and **Mobile SOS events**) are not supported in Orchestration. You should continue to rely on Visual Command Center Basic Alert Settings to configure alerting on these feeds.

Creating Advanced Workflows

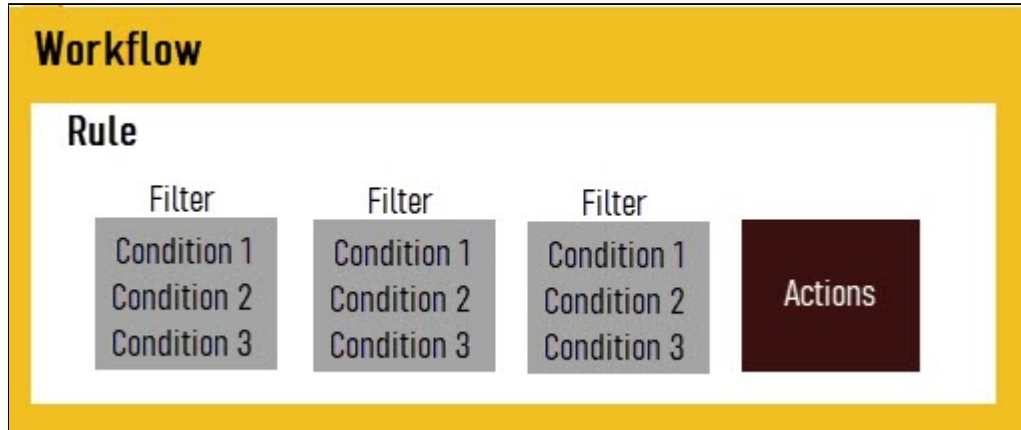
To use CEM Orchestration, your user role must have the **Orchestration Rules** permission. For more information or assistance gaining access, contact your Everbridge Account Manager.

To access the Workflows page, navigate to **Everbridge Open > CEM Orchestration > Workflow List**.

The Workflows page has two views – a compact **list view** that shows one workflow per line, and a **card view** that shows some information about each workflow.

What is a Workflow?

The CEM Orchestration Workflows page contains workflows, rules, and filters.



A **workflow** is a container for organizing related rules. Each of the out-of-the-box workflows contains the rules for a single Risk Event category. For example, the Crime workflow contains the rules for Crime events.

A **rule** contains the settings for kicking off one or more actions. Each rule can contain multiple groups of settings, called filters. If the conditions in any filter in the rule are met, the rule's action is taken. Creating alerts is the default action for all rules. An optional additional action is launching an incident.

A **filter** or **filter set** is a set of selected conditions, such as data source, event category, impact distance. When these conditions are met, CEM Orchestration takes the action(s) in the rule. Within a rule, you can create specific filters for different situations.

NOTE: To use different conditions, but take the same action or set of actions, create a new filter. To use different conditions, and take different actions, create a new rule.

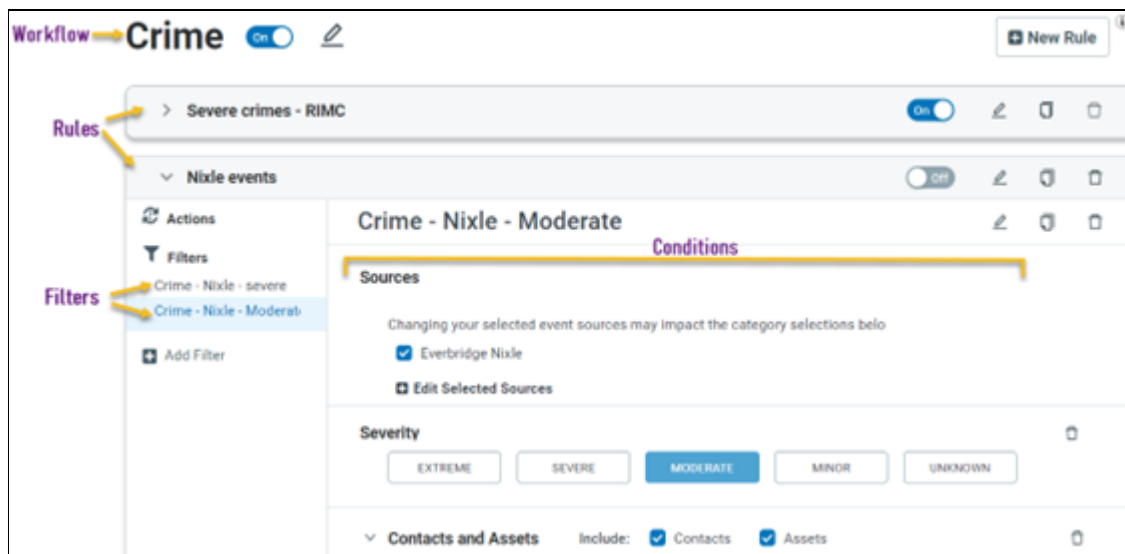
For example, the HAZMAT/Fire workflow could contain an Alerting rule. Within that rule, you could build filters for multiple use cases:

- Alert for all HAZMAT/Fire events—except wildfires—within one mile of any of my assets.
- Alert for wildfires within 15 miles of any of my assets except the asset type Camp.

- Alert for all wildfires within 20 miles of Camp assets.

When all the conditions for any of these filters are met, the rule’s action—create an alert—is initiated.

This image shows the parts of a workflow as they appear on the Orchestration Workflows page:

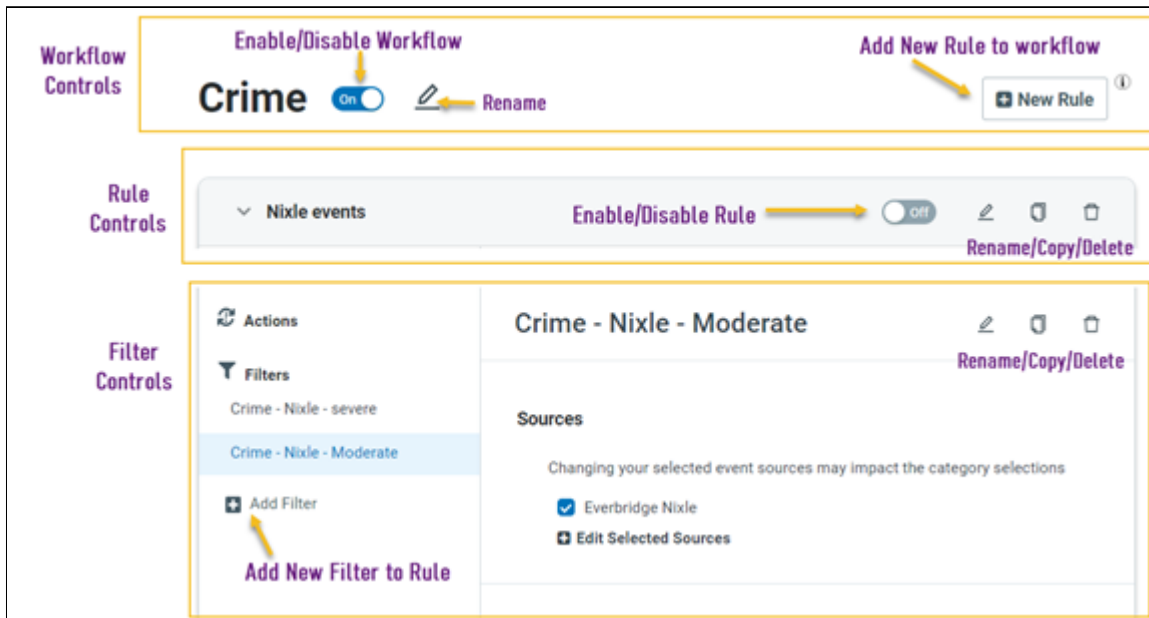


Enabling and Disabling Workflows and Rules

Workflows and rules have On/Off controls; this lets you edit a workflow or rule while it is disabled and not generating alerts.

When a workflow is **Off**, its rules are Off and none of the rules' actions are taken. When you toggle a disabled workflow **On**, all of its rules are turned On. If you want some rules enabled and others disabled, use the On/Off toggle for each rule.

If any **rule** in a workflow is enabled, the workflow is toggled **On**.



Advanced Alerting Workflow Examples

Through CEM Orchestration, you can create combinations of workflows, rules, and filter sets to accommodate a wide variety of use cases. Use the sections below as models to help you create the alert settings that meet your needs.

- [Use Case: Change the Severity Threshold for Alerting](#)
- [Use Case: Change the Impact Radius for a Risk Event Category](#)
- [Use Case: Vary the Impact Radius Depending on Event Severity](#)
- [Use Case: "Apply Always Alert" to One Risk Type](#)
- [Use Case: Create Alerting Criteria by Asset Type](#)
- [Use Case: Create Alerting Criteria for Contacts](#)
- [Use Case: Set Up Automated Incident Notifications](#)
- [Use Case: Special Conditions for Hurricanes, Earthquakes, and Weather \(US\)](#)
- [Use Case: Add Alerting Rules for a Self-Service Risk Event Feed](#)

Use Case: Change the Severity Threshold for Alerting

If you are using the Basic Alert Settings in the Admin Console, you can select the event severity from the drop-down for each risk source and category or subcategory.

If you are using Advanced Alert Settings in Manager Portal, to set a new severity threshold for alerting, find the workflows, rules, and filters you want to change, and select all severity levels that apply. For example, to alert on any risk events with moderate or higher severity, select the Moderate, Severe, and Extreme levels.

If **no Severity value** is specified in a filter, Orchestration creates alerts for events of **all** severities for the specified source and category and subcategories in the filter.

To add a Severity threshold to a filter that does not have one:

1. Navigate to **Settings > Organization > Everbridge Open > CEM Orchestration** and open the **Workflow List** page.
2. Select the workflow you want to change.
3. Select a rule in the workflow.
4. Select a filter.
5. Click **Add a Condition** at the bottom of the page and select **Severity** from the menu.
6. Click **Save**.

NOTE: If your rule has more than one filter, you may need to make this adjustment for each filter where you want to change the Severity threshold.

Use Case: Change the Impact Radius for a Risk Event Category

The Impact Radius, or alert radius, establishes the potential impact area for a Risk Event when the location is a point (not a polygon) on the map. When an asset is found within this impact area during an event's duration, Orchestration creates an alert. The larger the radius, the more alerts are likely to be created.

NOTE: The radius does not apply to risk events whose location is a polygon on the map. For polygon events, the alert area is the area within the polygon.

If you are using the **Basic Alert Settings** in the Admin Console, you can set the radius by using the slider for each risk source and category or subcategory.

If you are using **Advanced Alert Settings** in Manager Portal, to set a new Impact Radius for alerting, find the workflows, rules, and filters you want to change, and use the slider or enter a number for the Impact Radius.

If **no Impact Radius** is specified in a filter, Orchestration assumes a **radius of 1 mile (1.6) km** for the specified source and category and subcategories in the filter.

To add an Impact Radius to a filter that does not have one:

1. Navigate to **Settings > Organization > Everbridge Open > CEM Orchestration** and open the **Workflow List** page.
2. Select the workflow you want to change.
3. Select the rule and filter you want to change.
4. Click **Add a Condition** at the bottom of the page and select **Impact Radius** from the menu.
5. Use the link to switch between miles and kilometers as desired.
6. Enter a new distance or use the impact slider to change the radius.
7. Click **Save**.

Use Case: Vary the Impact Radius Depending on Event Severity

Frequently, organizations want to use a larger impact radius for high severity events and a smaller one for events of lower severity. With CEM Orchestration, you can do this using **Advanced Alert Settings**. (Basic Alert Settings do not support this use case.) Within a rule, you can create separate filters, one for the more severe events, and one for events that are expected to have a smaller, more local impact.

NOTE: When you need to use different conditions, create a new **filter**. If you need to take different actions for different conditions, create a new **rule**.

In this example, we want to configure the same action (Alert) but use a different condition—a larger impact radius—for Crime events with a severity of Severe or Extreme, and a smaller radius for events with a severity of Moderate or Minor. So, we create a new filter in the same rule.

1. Navigate to **Settings > Organization > Everbridge Open > CEM Orchestration** and open the **Workflow List** page.
2. Click on the Crime workflow.
3. Select a rule. (If this workflow has only one rule, that rule will open automatically.)
4. Select a filter. (If this workflow has only one filter, that filter will open automatically.)
5. For the Severity condition, select **Extreme** and **Severe**.
6. Adjust the Impact Radius condition to the desired value for Extreme and Severe events.
7. Click the filter's **Copy** button. A duplicate filter is created.
8. Select the duplicate filter.
9. Scroll to the Severity condition and change the selections to **Moderate** and **Minor**.
10. Adjust the Impact Radius condition to the desired value—a smaller radius for these events.
11. Use the **Edit** button on the tab to give the filter a meaningful name.
12. Click **Save**.

Use Case: Apply “Always Alert” to One Risk Type

CEM Orchestration lets you take different actions for different sets of conditions. In this example, we will apply the “**Always Alert**” setting to a single risk event subcategory. This means that alerts will be created for all events in that subcategory, even if there are no assets or contacts nearby.

If you are using the **Basic Alert Settings** in the Admin Console, you can select the Always Alert checkbox for each risk source and category or subcategory.

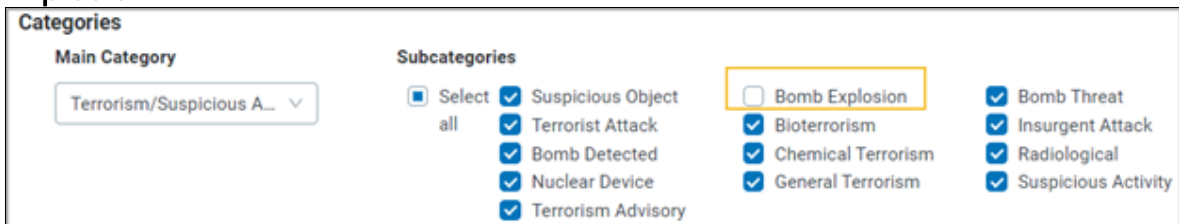
If you are using **Advanced Settings**, the Always Alert option is found on a rule’s Action tab, so you should create a separate rule for the subcategory for which you want to Always Alert.

NOTE: To use different conditions, but take the same set of actions, create a new filter. If you need to take different actions for different filters, create a new rule.

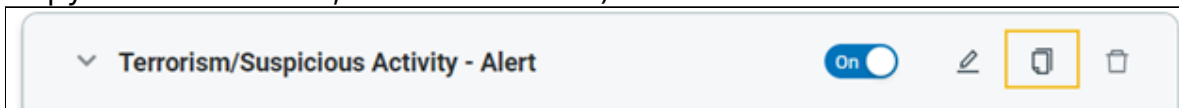
In this example, we will create a new rule in the workflow Terrorism/Suspicious Activity and configure it to always alert only for events in the subcategory Bomb Explosion.

To create this new rule:

1. Select the workflow to change (e.g., Terrorism/Suspicious Activity). For this example, the workflow has one rule with one filter set that opens automatically.
2. Scroll to the **Categories** condition and deselect the subcategory **Bomb Explosion**.



3. Scroll back up to the rule name and click the **Copy** icon. (Be sure to select the Copy icon for the rule, not the filter set.)



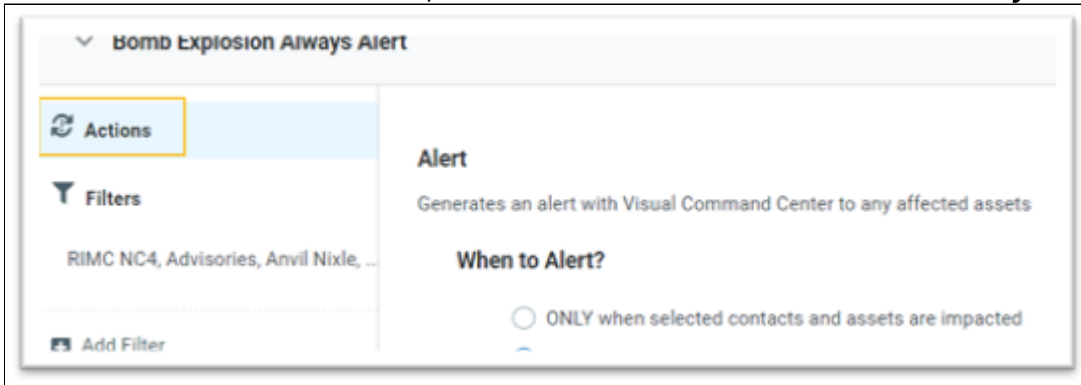
- A new rule is created with a default name. Click the **Edit** icon next to the name and give it a meaningful name like *Bomb Explosion – Always Alert*.



- In the new rule, in the filter tab, scroll to the **Categories** condition, and deselect all subcategories except Bomb Explosion.



- Select the rule's **Actions** tab, and under **When to Alert?** select **Always**.



- Click **Save**.

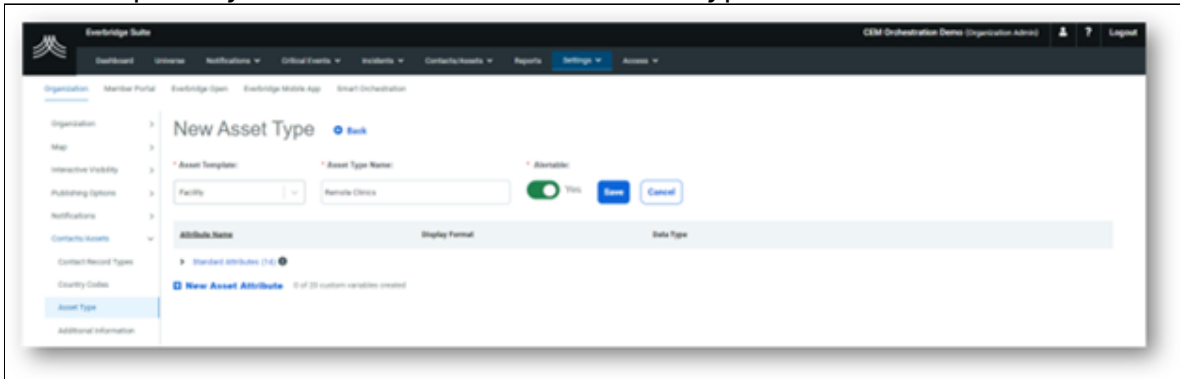
Use Case: Create Alerting Criteria by Asset Type

The Orchestration Advanced Settings allow you to set up different alerting criteria for different asset types. (Basic Settings do not support this use case.) In this example, we'll set up different alerting criteria for medical clinics in urban areas and rural areas.

Aligning Asset Types and Workflows

Before you create workflows, you need to define your asset types to correspond with the way you want to alert on them. In this example, we will create separate asset types for the rural and urban clinics, by following these steps:

1. Navigate to **Settings > Organization > Contacts/Assets > Asset Types**.
2. From the Asset Template menu, select **Facility**.
3. In the Asset Type Name field, enter **Urban Clinic**. Enable the Alertable setting for the new type.
4. Click **Save**.
5. Repeat Steps 3-5 to add the **Remote Clinic** asset type.
6. Add or upload your clinic assets to these two types.



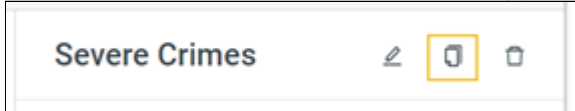
Creating Alerting Thresholds for Different Asset Types

Once you have created asset types that will align with your alerting criteria, go to the CEM Orchestration Workflows page to create a new filter inside a rule and workflow.

NOTE: When you need to use different conditions but the same action, create a new filter inside a rule.

In this example, we will edit a **Crime** workflow, creating different filter sets for **urban** and **rural clinics**.

1. From the Workflows page, select the **Crime** workflow (or another workflow you want to change).
2. Select the rule and filter you want to change.
3. Click the **Copy** icon to duplicate the existing filter. A new filter is created with the default name *Filter Set 1 – Copy 1*.



4. Select the new filter and click the **Edit** icon to change the filter name. Rename it *Urban Clinics*.
5. Scroll to **Impacted Assets** and deselect contacts and all asset types except *Urban Clinics*.
6. Under Impacted Assets, select **Urban Clinics**.
7. Adjust the **Impact Radius** and **Severity** to the values you want for clinics in urban areas. To avoid over-alerting in population-dense areas, you set a relatively small Impact radius (e.g., 1 mile) and a high severity.
8. Use the **Copy** button to create a copy of the filter.
9. Scroll to **Impacted Assets** and deselect contacts and all asset types except *Rural Clinics*.
10. Adjust the **Impact Radius** and **Severity** to the values you want to apply to clinics in rural areas.
11. Open the original filter; under Impacted Assets, deselect *Urban Clinics* and *Rural Clinics*, since you have now created separate filters for those assets.
12. Click **Save**.

Use Case: Create Alerting Criteria for Contacts

Using the Orchestration Advanced Settings, you can configure alerting for contacts of different types and groups when affected by Risk Events in their static, last known, expected, or travel locations. This lets you set different alerting thresholds or launch different incident templates that target different sets of contacts. (Basic Settings do not support this use case.)

In this example, we will configure different alerting criteria for a particular set of contacts. We have a workflow that is configured to generate alerts for all types of **Terrorism** and **Suspicious Activities** events near any of our contacts. Because we experience so many alerts for events in the **Middle East**, for employees there we want to focus our attention—and alerting—only on events of **Severe** and **Extreme** severity.

In this case, we want to configure the same action (Alert) for different conditions, so we will create a distinct filter set in a rule in the Terrorism and Suspicious Activities workflow. For this example, we have assigned all our contacts located in Middle East countries to a contact type named ***Middle East Contacts***.

1. From the Workflows page, select the **Terrorism and Suspicious Activities** workflow.
2. Select the existing rule and the filter.
3. Note that under Severity, all options except Unknown are selected.
4. Scroll to Contacts and Assets and under Contact Types, deselect ***Middle East Contacts***.
5. Click the **Copy** icon to duplicate the existing filter. A new filter is created in this rule.
6. Select the new filter and click the **Edit** icon to change the filter name. Rename it ***Terrorism - Middle East***.
7. Change the Severity values in the new filter to only **Severe** and **Extreme**.
8. Scroll to Contacts and Assets and deselect assets.
9. Under Contact Types, deselect all options except ***Middle East Contacts***.
10. Click **Save**.

Use Case: Set Up Automated Incident Notifications

CEM Orchestration allows you to set up automated incident notifications for events that may affect your assets and contacts.

Using **Basic Alert Settings**, you can select one Incident template that is used to launch an Incident when an alert is triggered for an event category or subcategory for a source. (Four sample incident templates are provided in Manager Portal when this feature is provisioned for your Organization.)

Using Advanced Alert Settings, you can alert on and notify different sets of contacts, based on their contact type, group, or location. You can use different alerting thresholds and launch different incident templates for the same events.

In this example, we will configure an **Advanced Settings** workflow to automatically notify an Organization's executives when a severe or extreme civil unrest event occurs near a location where the executive has used the Everbridge mobile app to check in. We will also configure a second notification, using a different template, to be sent to members of an Employee Safety Team.

For this example, the executives belong to a contact group named *Executives*. To create the workflow that launches the Incident Notifications:

1. Click **New Workflow**.
2. In the Create New Workflow dialog, type a name for the workflow, for example, *Executive Protection*.
3. Under the Actions heading, select **Include Incident**, and click **Create**.
4. In the filter, under Sources and Category, select the risk sources and Risk Events that you want to create alerts for.
5. In the **Add Condition** menu at the bottom of the page, select **Severity**.
6. Select the **Severe** and **Extreme** options.
7. Under the **Contacts and Assets** heading, select only the **Contacts** checkbox.
8. Under the Impacted Contacts section, select the *Executives* contact group and **Last Known Location** option.
 - Note that **all** of your selections under **Impacted Contacts** are applied as part of the filter. In this example, alerts are created only for contacts who are in the Executive group AND have a Last Known Location within the impact radius. Similarly, selecting any combination of Contact Type, Contact Group, and Location Option means alerting only on contacts in the selected group, who ALSO have the selected type AND location option.

For all three conditions “**Select all**” means to select all contacts; so, for Contact Groups, “**Select all**” means to select all **contacts**, not all groups, or all contacts in groups.

9. Set the Impact Radius to send an alert when a contact is within a certain distance from an event.
10. Click the **Action** tab and select a template for notifying the executive contacts.
11. Under **Who is Notified?**, select *Contacts who are part of the Incident template AND any impacted contacts in the event area*.
12. Click the **Add Action** button and select **Incidents**.
13. Select a template configured to notify the contacts on the Employee Safety Team.
14. Under **Who is Notified?**, select *Contacts who are part of the Incident template ONLY*.
15. Click **Save**.

Use Case: Special Conditions for Hurricanes, Earthquakes, and Weather (US)

While a standard set of conditions (including Category, Severity, and Impact Radius), apply to all Risk Event sources, a few have specific conditions that apply to that risk source only. For Basic Alert Settings, these are available only on the Alert Settings page for the source they apply to.

In **Advanced Alert Settings**, when using these conditions, it is important to configure that risk source in a separate rule or filter.

For example, multiple risk sources report earthquakes but among the standard risk sources, only Earthquakes (USGS) regularly reports a Magnitude value. Therefore, if a filter includes other risk sources along with Earthquakes (USGS) the Magnitude condition is not available to be added to the workflow. For this use case, you should create two filters: one for Earthquakes (USGS) that includes the Magnitude condition, and one for other risk sources that does not.

The special conditions available in Orchestration are **Earthquake Magnitude**, **Hurricane Wind Swath**, and **US Weather Significance**.

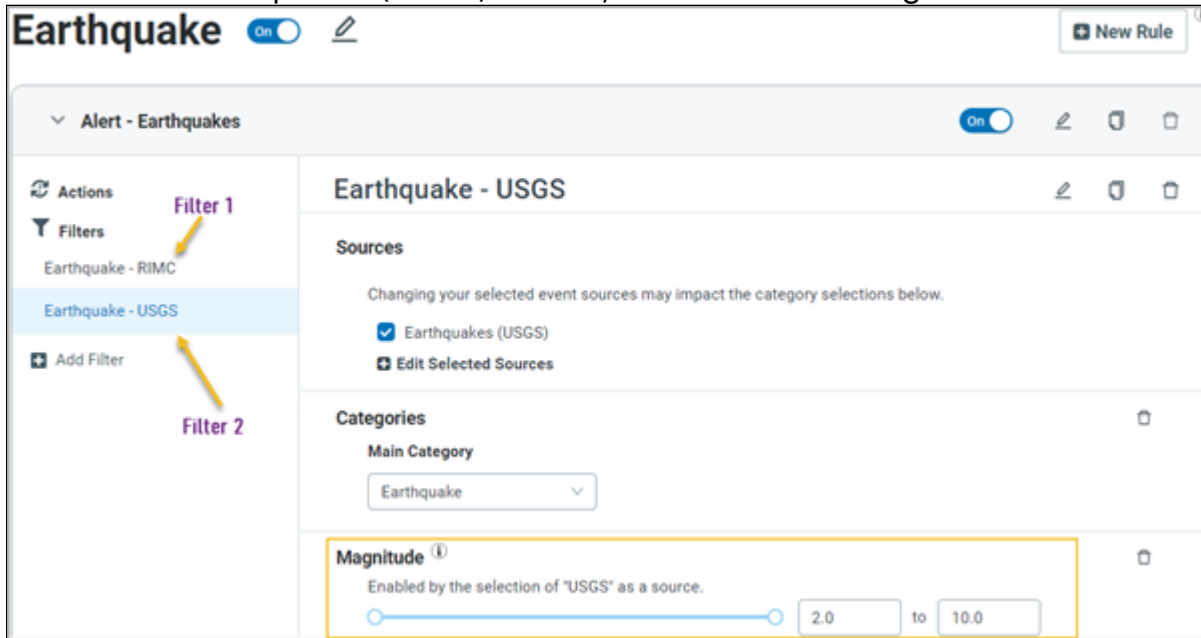
Earthquake Magnitude

Magnitude is a measure of earthquake intensity. The data source Earthquakes (USGS) reports magnitude values; so, for this source, you may use the Magnitude condition in place of or in addition to Severity. Enter values in the Minimum and Maximum fields or use the slider to select any Magnitude value between 2.0 and 10.0.

The Magnitude condition applies only to the **Earthquakes (USGS) source**; if you include another data source in the same workflow, the Magnitude condition will not be available.

Below is an example of an Earthquake workflow with one rule, which has two filters: one for the source RIMC Powered by NC4 (which uses Severity values) and

one for the Earthquakes (USGS) source, which uses the Magnitude condition.



Hurricane Wind Swaths

Wind swaths are geographic areas affected by winds of different speeds. The data source Hurricanes (GDACS) reports wind swaths instead of Severity values. Therefore, in workflows for the Hurricanes source, you should use the Wind Swath condition in place of Severity.

This condition applies only to the **Hurricanes** source; if you include another data source in the same workflow, the Wind Swath condition will not be available.

To get alerts only for assets in the area experiencing the most intense wind, choose 120 mph as the value of the Wind Swath condition. To get alerts for assets in a wider area, choose 90 mph or 60 mph as the minimum wind speed. Or, to get alerts for assets in the projected path of a hurricane, choose the value "**Projected path of hurricane.**"

US Weather Significance

In addition to Severity, the US National Weather Service (NWS) reports a **Significance** value for weather events. Significance means how likely and how severely a weather hazard may affect people. The Significance condition applies only to the **Weather (US) source**; if you include another data source in the same workflow, the Significance condition will not be available.

The three levels of Significance are:



- **Watch:** Conditions are favorable for a significant weather event to develop.
- **Warning:** Hazardous conditions are expected, and you may have to act, such as delaying travel, staying indoors, dressing for extreme weather, or evacuating.
- **Advisory:** Weather is expected that is not severe enough to merit a warning, but which may cause significant inconvenience or make travel hazardous.

Use Case: Add Alerting Rules for a Self-Service Risk Event Feed

Self-Service or **Custom Risk feeds** are a premium feature; if your CEM bundle includes this feature, you can add your own risk event data sources to Visual Command Center and Orchestration. The Everbridge Online Help contains information on how to configure a self-service risk feed.

If your Organization has recently added a Self-Service Feed, follow the instructions below to set up alerting for this feed through CEM Orchestration.

To add alerting rules for a Self-Service Risk Event Feed:

1. Make sure your risk event feed is set up correctly and that you can see the Risk Events from that feed in Visual Command Center.
2. Navigate to **Settings > Everbridge Open > CEM Orchestration**.
3. Click **Workflows**. The Workflows page will appear.
4. Considering the risk data that you expect from this Self-Service Risk Feed, review the workflows available in your Organization.

Add the Self-Service Feed to Existing Workflows

If you expect that Risk Events from the Self-Service feed will fall under the categories covered by existing workflows, follow these steps to manage alerting for this feed in these existing workflows:

1. Open each workflow to add this new feed to.
2. Under the Sources section, click **Add Sources**.
3. Select your new source from the list and click **OK**.
4. Click **Save**.

Create a Separate Workflow for the Self-Service Feed

To create a separate workflow to manage alerting for this feed:

1. Click **New Workflow** in the Workflow page.
 2. Name your new workflow something that makes it easy for you and others to understand the type of risk it covers.
 3. Consider the risk category and the source name.
 4. Select the **Alert** checkbox.
 5. Under **Sources**, click **Add Sources** and select your Self-Service data source from the list.
 6. Select the affected **Contacts** or **Assets** to alert on.
 7. Set the **Impact radius**.
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8. To set a threshold for another alert attribute, for example, Severity or Category, click **Add Condition** and select the attribute.
9. Select threshold values for any attributes you add.
10. Click **Save**.

Delete a Workflow

To delete a Workflow:

1. Locate the Workflow that you want to delete and click the **Trash** icon. A confirmation window will appear.
2. Click **Delete**. A confirmation message will appear.

Import a Workflow

You can use the import feature to import an existing workflow—for example, a workflow from a test Organization.

To import an existing workflow into your CEM Orchestration Workflows:

1. Click **Import Workflow**. The Import dialog appears.
2. Click **Choose File**. Your system's File manager appears.
3. Select the file that contains the workflow.
4. Click **Import**.
5. An onscreen message will list any risk sources, contact types, and contact groups that are in the imported workflow but not in the destination Organization. These will not be included in the import.
6. **Save** the workflow.

Settings retained from Imported workflows include:

- Workflow, rule, and filter names
- Risk Sources (if they are available in the destination organization)
- Categories and subcategories
- Impact Radius
- Most conditions, including Severity, Time Frame, Magnitude, Significance, Wind Swath
- Asset Types (if they are available in the destination Organization)
- Contact Location Options