Mass Notification Operator Guide

Everbridge Suite

June 2024

Everbridge Suite
2024
Printed in the USA

Everbridge, Inc.
155 N. Lake Avenue, 9th Floor
Pasadena, California 91101 USA
Toll-Free (USA/Canada) +1.888.366.4911

Visit us at www.everbridge.com

System Overview

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

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

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

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

Registering Your Access to the Manager Portal

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

Everbridge User Registration Invitation

Dear Sarah,

An Everbridge user account has been created for you by an administrator for Customer Learning Universe. In order to gain access, you are invited to register your account. This invitation will expire in 72 hours.

To register your account, just click on the link below or paste it into your browser.

https://manager-qa1.everbridge.net/registers?auth=TyWn4BO2DnU%3D&code=M%2Bq04f9KvcHY8AeofnMRB5uWJpTPsDmgfSQnLAN746Q%3D

Should you have any questions or if you received this invitation in error, please contact an administrator.

Regards,
Customer Learning Universe

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

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

5. **Answer**: In this field, type the answer to the question. Optionally, select the checkbox: **Show answer**.
6. **Time Zone**: From this drop-down list, select your time zone.
7. Click **Continue**.
8. Go to the Everbridge login page: **http://manager.everbridge.net** or **http://manager.everbridge.eu**.
9. Enter the **Username** and **Password** you just created.
10. Click **SIGN IN.** After you are signed in, you can manage your user profile. See Managing Your User Profile.

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

Managing Your User Profile

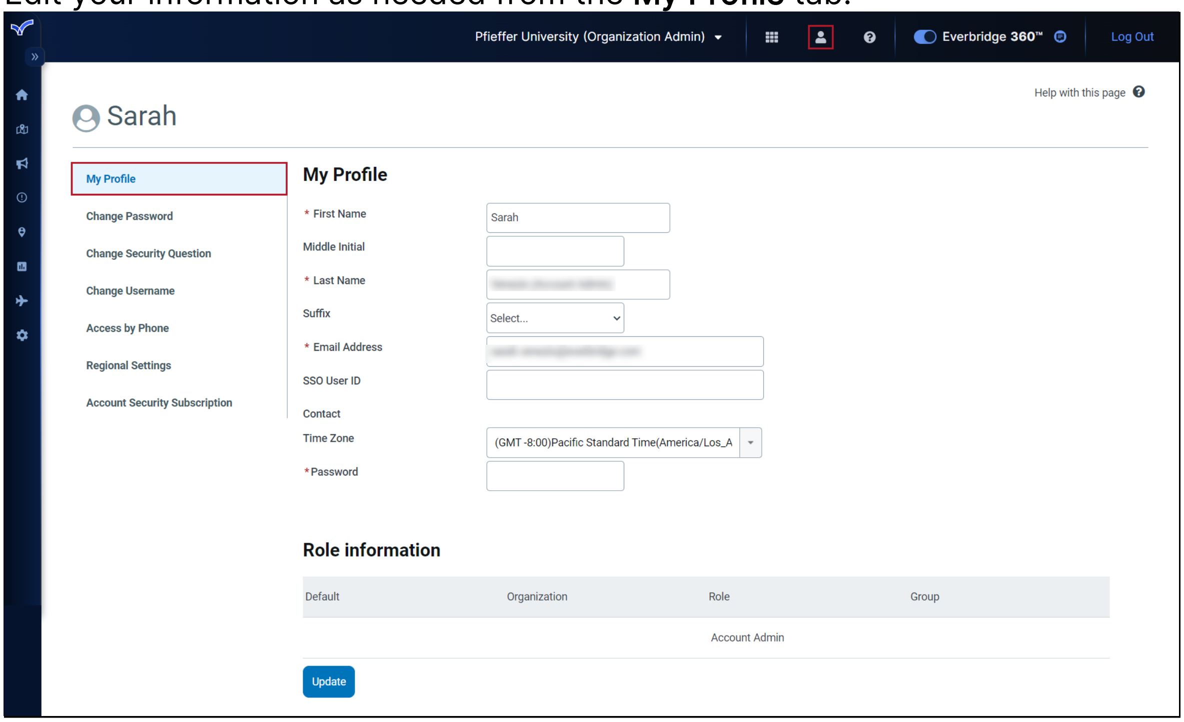
After successfully logging in, you will see an Everbridge Suite page. You have access rights to the navigation tabs depending on your permissions and your Organization's purchased products. See Apps Menu for more details.

Make Changes to Your User Profile

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

To change your profile:

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



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

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

Change Your Password

To change your password:

1. Click **Change Password** from the left-hand panel. The **Change Password** panel is displayed.
2. Enter the password information in the fields and click **Save**.

<table>
<tr><th>Federal Clients</th><th>Non-Federal Clients</th></tr>
<tr><td>At least 12 characters.</td><td>At least 8 characters.</td></tr>
<tr><td>At least one item from each of the following four groups:
Uppercase letters (A through Z)
Lowercase letters (a through z)
Numerals (0 through 9)
Special characters: ! @ # $ % ^ & * ( )
Cannot contain your account, first or last name</td><td>At least one item from three of the following four groups:
Uppercase letters (A through Z)
Lowercase letters (a through z)
Numerals (0 through 9)
Special characters: ! @ # $ % ^ & * ( )
Cannot contain your account, first or last name.</td></tr>
<tr><td>Password lock after 3 attempts.</td><td>Password lock after 5 attempts.</td></tr>
<tr><td>Password Expiration default: ON
Prompt users to create a new password every:
30 Days.
60 Days.
180 Days.</td><td>Password Expiration default: ON
Prompt users to create a new password every:
90 Days.
180 Days.
365 Days.</td></tr>
<tr><td>When you reset or change your password, you will need to provide a new password. The new password cannot be the same as the previous 24 passwords. If you change your password, the counter resets to zero (0) and starts a new cycle.</td><td>When you reset or change your password, you will need to provide a new password. The new password cannot be the same as the previous 3 passwords. If you change your password, the counter resets to zero (0) and starts a new cycle.</td></tr>
<tr><td>When you forget your password, you are sent a temporary password that is valid for the next 24 hours.</td><td>When you forget your password, you are sent a temporary password that is valid for the next 72 hours.</td></tr>
</table>

Change Your Security Question

To change your security question:

1. Click **Change Security Question** from the left-hand panel. The **Change Security Question** panel is displayed.
2. Select a new question from the drop-down list.
3. Type the answer to the question. Your answer is hidden. Optionally, select the check box: **Show answer**.
4. Type your password and click **Save**.

Access a Notification by Phone

To be able to access a Notification by phone:

1. Select **Access by Phone** from the left-hand panel.
2. Enter your **User ID** and **Password** in the respective fields.
    - The **User ID** and **Password** must be numeric, but the fields cannot be identical. For example, if the **User ID** is “991100”, then the value in the Password field cannot also be “991100”.
    - The fields can only contain digits 0-9, but cannot start with zero (0).
        - The values cannot contain all the same digits (such as all “1”, as in 111111).
        - The values cannot be any of the following nor the reverse of any of them: 123456, 1234567, 12345678, 123456789, 124567890.
    - Minimum length: 6 digits
    - Maximum length: 20 digits
    - The values cannot be empty.
    - The values cannot contain spaces (no leading spaces, no spaces between digits, and no trailing spaces).
    - The values cannot contain any non-alphabetic special characters or alphabetic characters.
3. Click **Save**.

Change User Regional Settings

To change the User Regional Settings from US English:

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

    The semicolon delimiter does not support the following:

- Incident Quick Reports
- Point Address Data

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

4. Click **Save**.

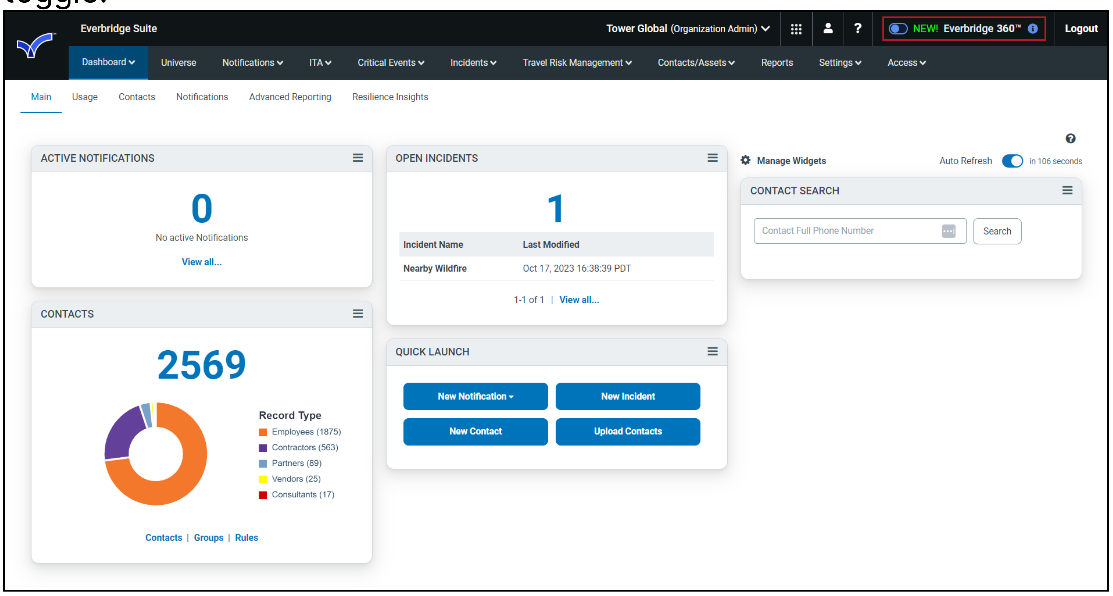
Apps Menu

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

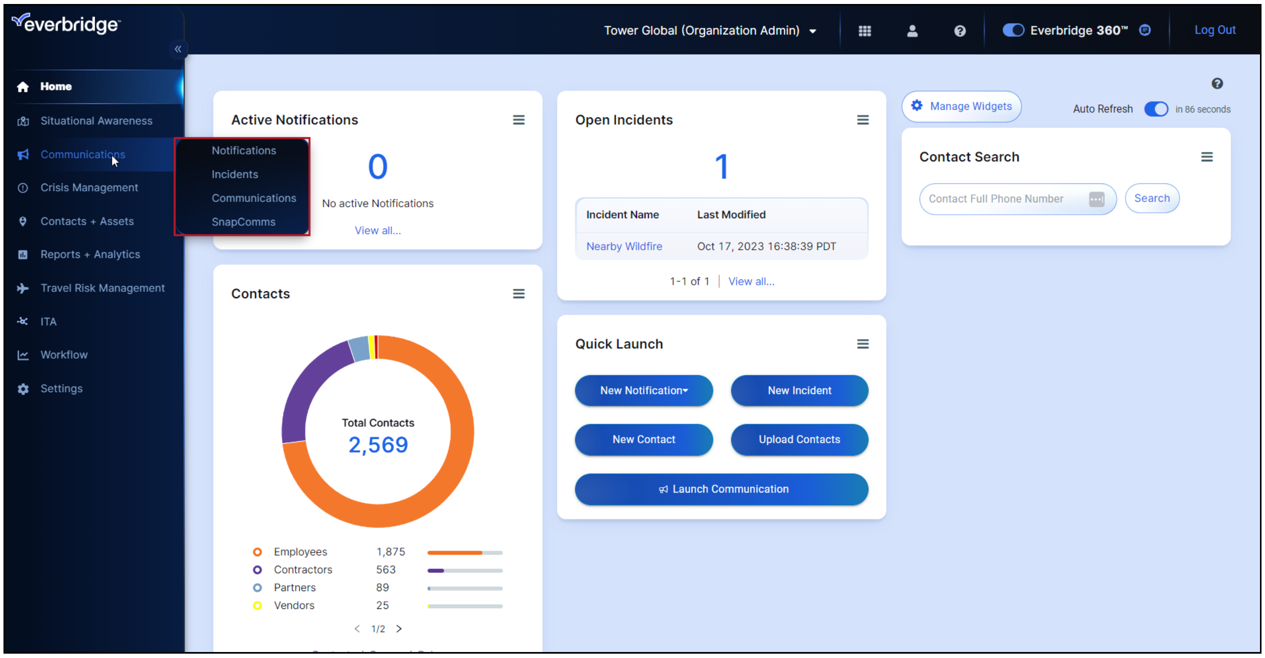
There are two different App Menus:

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

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



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



Account-level Menu

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

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

Organization-level Menu

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

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

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

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

Notifications Overview

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

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

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

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

Schedule Notification Template

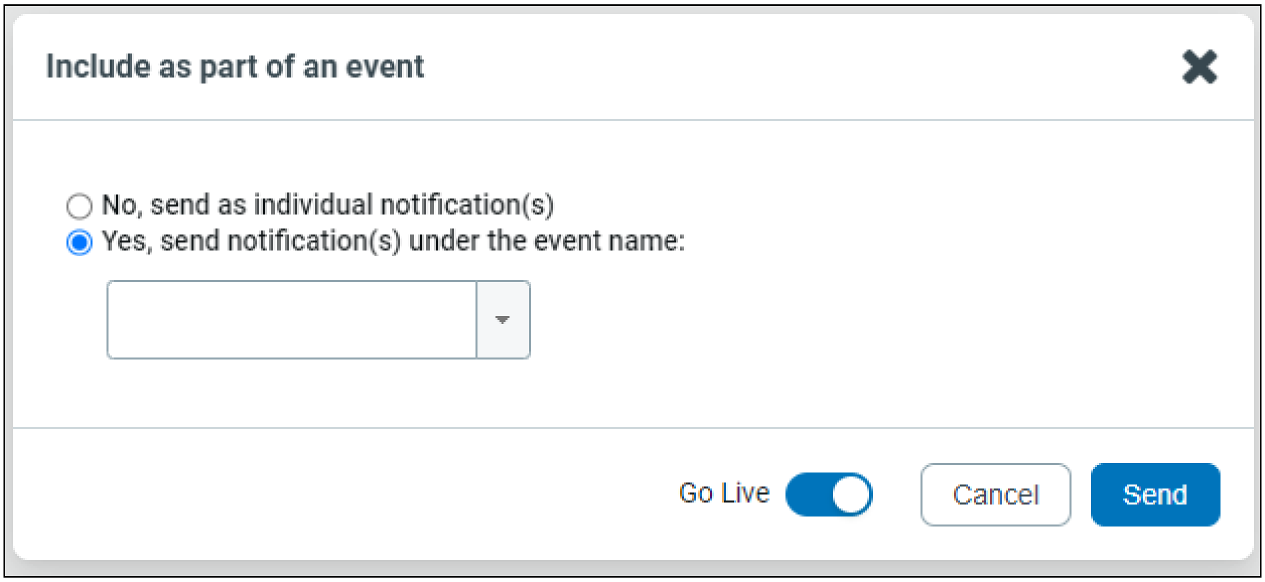
The **Scheduled** subtab contains the Notifications that you predefined and pre-filled while planning for emergencies and other events ahead of time. From this list, you can select the template that has been scheduled to be released on a specific date or the recurring (or repeating) Notification.

Under **Sched/Recurrence**, for scheduled Notifications, you can see the date and time of scheduled Notifications. For Recurring Notifications, hover the mouse to see the start and end dates, how often the Notification will repeat, and the number of days.

Send Notification Templates

To send a Notification template:

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

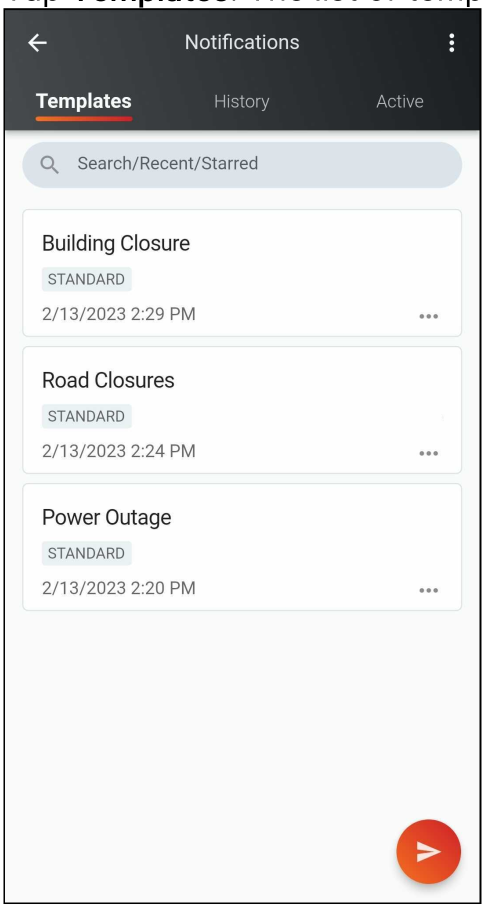


Sending Notifications From ManageBridge

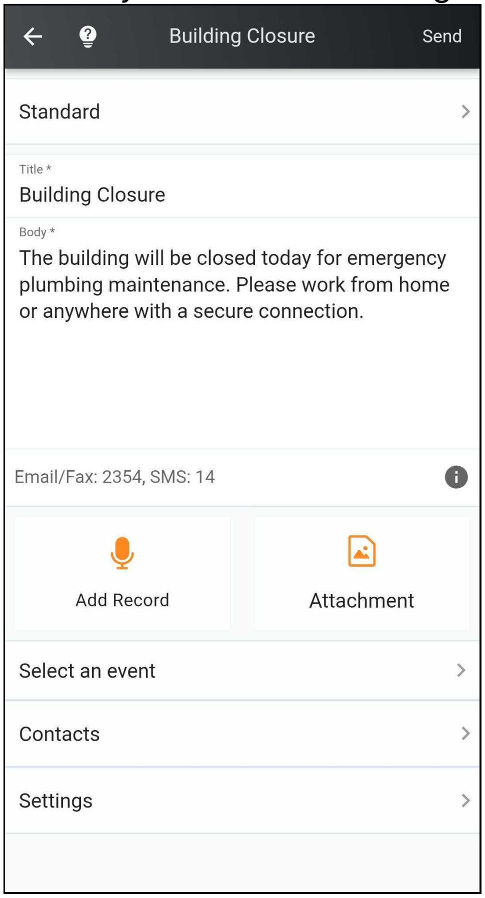
Users can perform all the tasks of sending and monitoring Notifications from the ManageBridge app just as they would from the desktop Manager Portal.

To send a new Notification from ManageBridge using a template:

1. From the home screen, tap **Notifications**.
2. Tap **Templates.** The list of templates available to you is displayed.



3. Tap the template you want to use. Your message is displayed. You can also manually enter a new message if you don't have a template to use.

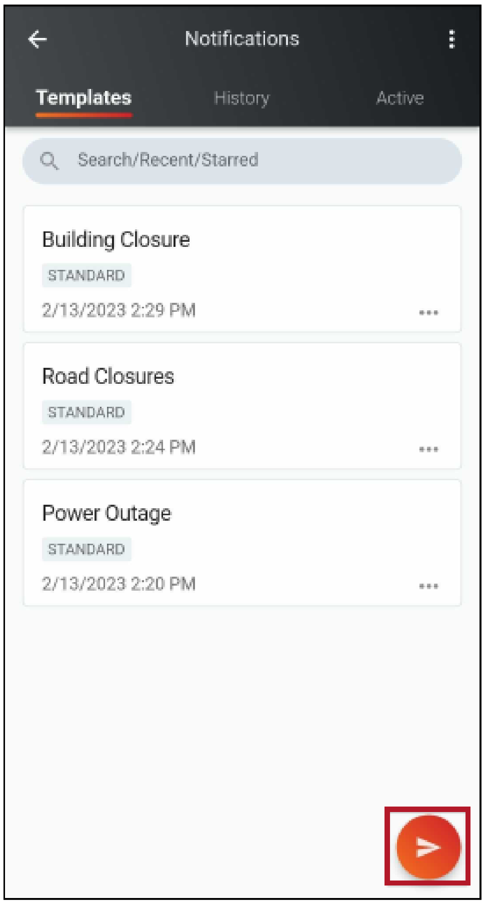


4. Add a voice recording or attachment, if desired.
5. Tap **Select an event** to assign your notification to an event. See Notification Events.
6. Click the back arrow to return to your message.
7. Tap **Next** to be taken to the **Contacts** page. Contacts can be added via Groups, Individuals, Rules, Map, or by utilizing the Search bar. Return to your message once the contacts have been selected.
8. Tap **Settings** to configure and preview the **Final Settings** page, including:
   - Delivery methods
   - Sender Information
   - Voicemail Preference
   - Confirmation preference
   - Delivery Throttling
   - Member App Settings
   - Additional Notifications settings
9. Tap **Send**. The summary page is displayed.
10. Tap **Stop** to stop this notification.
11. Tap **Send Follow-Up** if you want to send a follow-up message for this notification.

12. Click the back arrow to return to **Notifications**.
13. From **Notifications**, you can tap:
    - **History** to see a history of all your notifications both active and sent.
    - **Active** to see your active notifications.

Sending a New Notification Without a Template

If there are no applicable templates to use, you can manually create a new Notification on the fly by tapping the orange message icon in the bottom-right corner of the Templates Page.



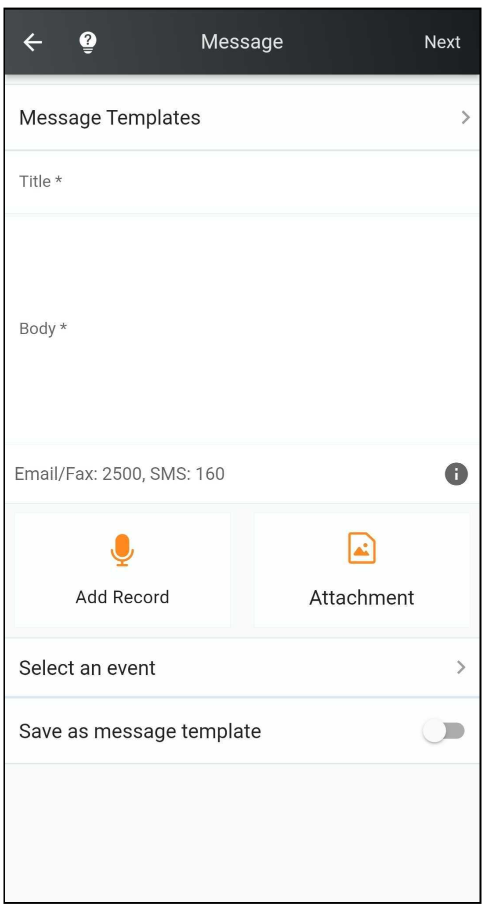
The New Notification page will appear, where the following settings can be configured:

- **Simulation Mode:** Message senders can practice the entire Notification workflow without sending out live Notifications. Access to simulation mode will be restricted based on the permissions provisioned in Manager Portal.
- **Imminent Threat to Life:** When selected, the Notification will be set to High Priority. Messages will also override the recipients' silent switch or "Do Not Disturb" mode on Apple devices.
- **High Priority:** Toggle ON to indicate to the recipient that this is a priority issue.

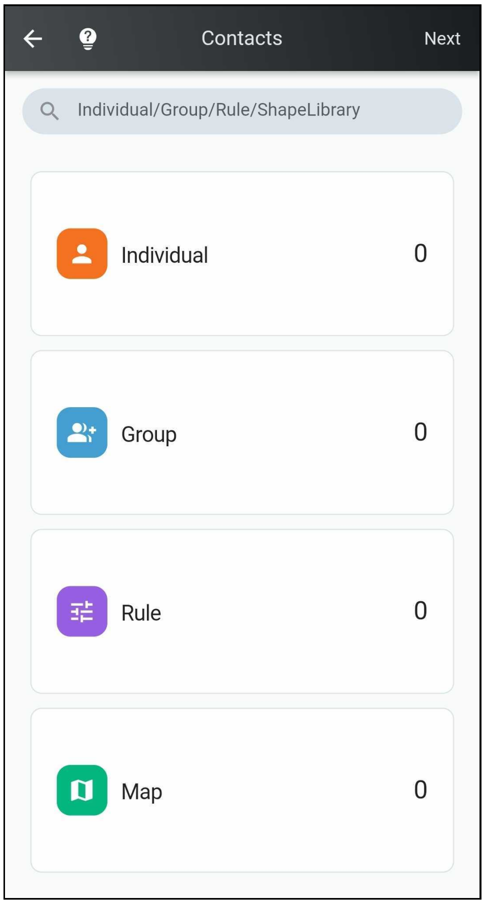
- **Notification Type:**
    - Standard
    - Polling
    - Quota
    - Conference
- **Use Custom SMS Message:** Use this option to create a separate message for SMS delivery methods. When selected:
    - Text entered directory below will only go to non-SMS delivery methods (such as email, Everbridge Mobile App, etc.)
    - The title will not be included in your SMS message.
    - Only available for the Standard message type.

After the above choices have been made, you'll proceed to the Message page. Here, you will:

- Select a Message Template (if applicable)
- Enter the message body
- Add a voice recording or attach a file
- Select an Event
- Save as a Message Template



Once the information has been filled in, tap **Next** to specify the recipients of this message. This can be done by choosing individual Contacts, entire Groups, via Rules, or from the Map.

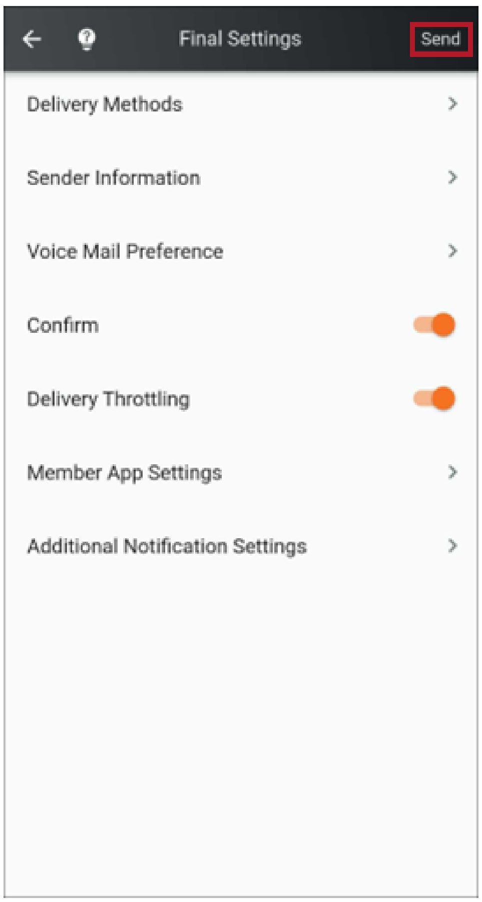


When the recipients have been selected, tap the **Back** arrow at the top, and then **Next**. You'll be taken to the **Final Settings** page, where you can configure:

- **Delivery Methods**
  - Text Paths
  - Voice Paths
  - Primary SMS
  - Primary Email
  - Primary Mobile
  - Everbridge Mobile App
- **Sender Information**
  - Sender Email
  - Sender Caller ID)
- **Voice Mail Preference**
  - Message Only
  - No Message
  - Message with Confirmation
- **Confirmation Preference (Enabled/Disabled)**

- **Delivery Throttling (Enabled/Disabled)**
- **Member App Settings**
  - Request Location
  - Request Image
  - Request Additional Information
  - Enable Sharing Options
- **Additional Notification Settings**
  - Language
  - Duration
  - Contact Cycles
  - Cycle Interval
  - Path Interval

Once all of the Final Settings have been specified, tap **Send**.



Launching a Notification by Phone

When you cannot access the Internet or Wi-Fi, you can still launch Notifications if you have set them up.

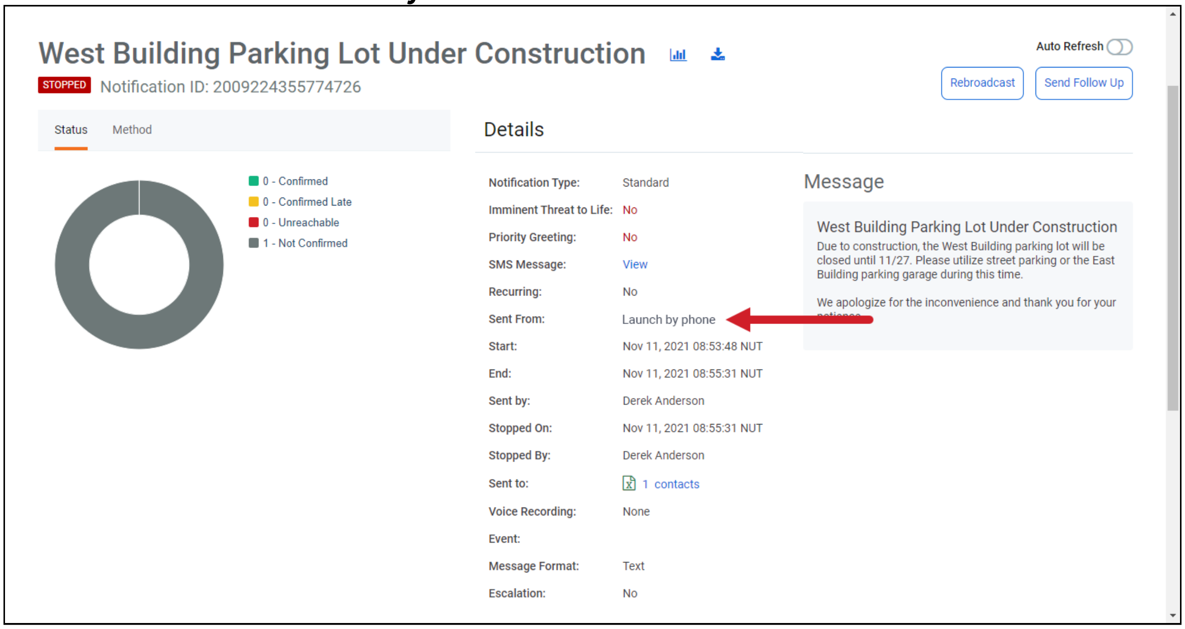
To launch a Notification by phone:

1. Using your phone, dial the respective phone number from the following table:

Description	Number
Global Direct Phone	+1 857-444-0443
Canada Toll-Free	800-971-5015
Puerto Rico Toll-Free	800-971-5015
United Kingdom Toll-Free	0800-088-5445
United States Toll-Free	800-971-5015
United States Virgin Islands Toll-Free	800-971-5015

   You will hear: “Welcome to the Message Center, powered by Everbridge.”
2. Follow the on-phone instructions, as shown next.
3. Enter your custom **Organization ID** if asked.
4. If you have multiple Notifications, enter the **Template ID** number and press # (or press * to hear a list of all the template IDs).
5. Press **1** to confirm your Notification Template ID or follow the instructions to hear a list of Template IDs. Each Notification was set up in **Notifications > Send & Save > Save as a Notification Template**.
6. Press **1** to send your Notification now.
7. Hang up when instructed.

8. Log in to Everbridge Suite to see the **Active/History**. The Notification Details show **Sent From: Launch by Phone**.



Notification Events

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

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

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