Incident Operator Guide

Everbridge Suite

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Everbridge Suite
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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

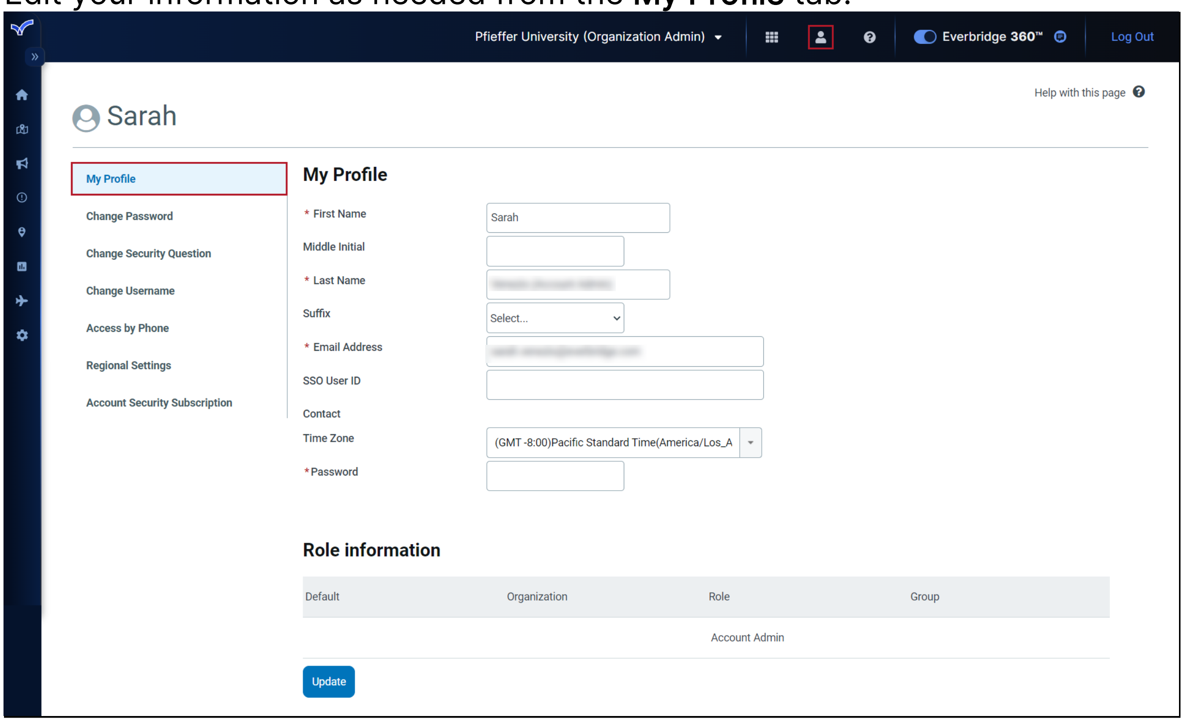
After successfully logging in, you will see an Everbridge Suite page. You have access rights to the navigation tabs depending on your permissions and your Organization's purchased products. See Apps Menu for more details.

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**.

Federal Clients	Non-Federal Clients
At least 12 characters.	At least 8 characters.
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	• 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.
Password lock after 3 attempts.	Password lock after 5 attempts.
Password Expiration default: ON Prompt users to create a new password every: • 30 Days. • 60 Days. • 180 Days.	Password Expiration default: ON Prompt users to create a new password every: • 90 Days. • 180 Days. • 365 Days.
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.	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.
When you forget your password, you are sent a temporary password that is valid for the next 24 hours.	When you forget your password, you are sent a temporary password that is valid for the next 72 hours.

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**.

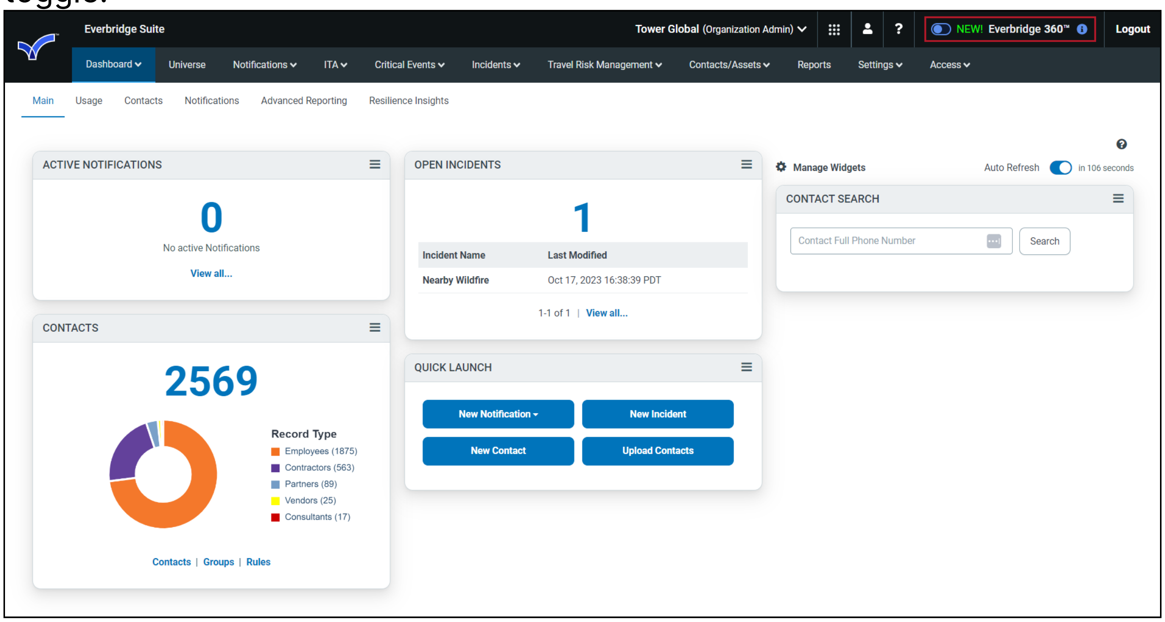
Apps Menu

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.

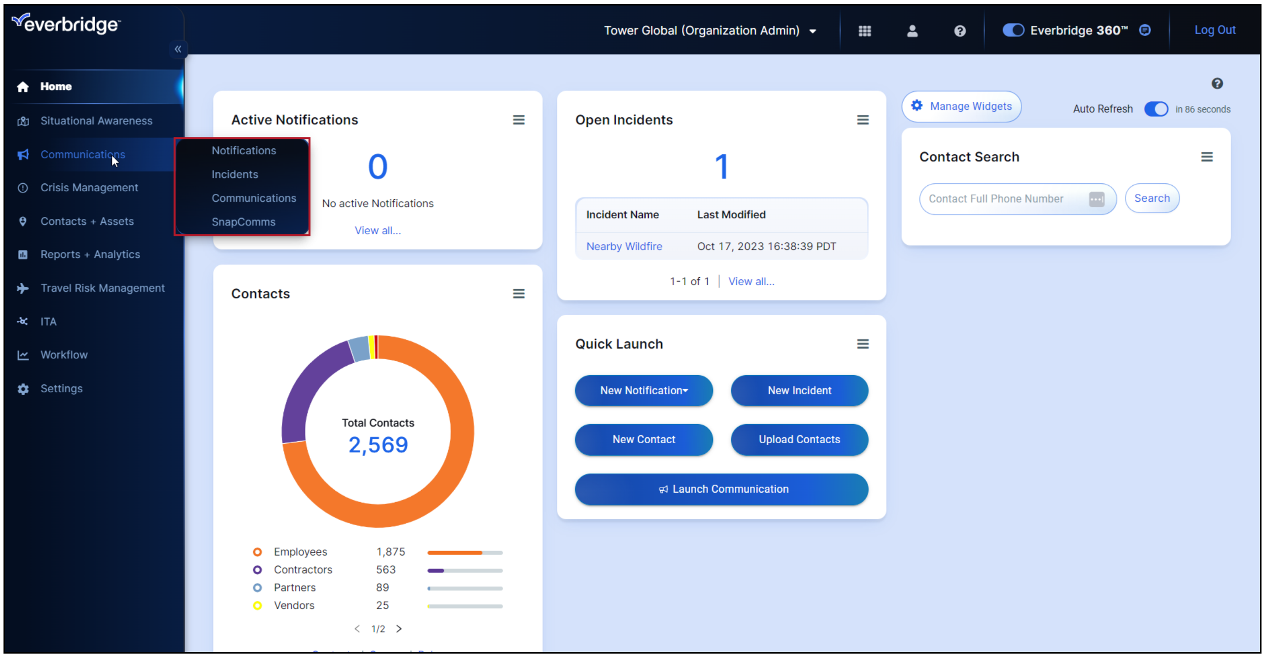
There are two different App Menus:

- 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.

What is Incident Communications?

When responding to a situation, you need to choose the action that represents the best way to handle the situation. For example, a hurricane is approaching one of your main warehouses and a watch has been called. The storm has already reached Category 2, and 20 employees and contractors work in the warehouse.

With Incident communications, you can use quick, template-based, automated communication plans for responding to events within a company, organization, or government office. In the example above, you can launch an Incident Notification to communicate to your contacts that they should go to a place of safety.

Alternatively, you may have a situation that does not immediately have a high impact but has the potential to develop a higher severity. For example, a tropical storm is approaching your offices in Australia. It is projected to make landfall within the next three to four days. In this case, you may want to inform your contacts, but no immediate action is required. Using Incident communications, you can launch an Incident and make updates to it as a situation progresses.

As an Incident Operator, you launch and manage Incidents assigned to your Incident Operator role.

Logging into Everbridge Suite

For a list of supported browsers, see the latest *System Requirements for Everbridge CEM Suite and Mobile Apps Release Notes* in the **Home** page of the Everbridge Support Center.

1. From a browser, type `https://manager.everbridge.net/open` The **Everbridge Suite Sign-in** page is displayed.
2. Type your username and password that you configured for Everbridge Manager Portal. If you do not remember your username and/ or password, select **Forgot Username** or **Forgot Password**, depending on your requirements.
3. Select **Sign In**.

Ways to Launch an Incident

There are several ways you can launch an incident. How you launch an incident depends on:

- the Everbridge products your organization has access to.
- your individual needs. For example, the type of incident that you want to launch.

Method	Description
Web browser	Everbridge Manager Portal is accessed online through a web browser. See [Logging into Everbridge Suite]().
Mobile	Everbridge ManageBridge is a free native mobile application available to Everbridge clients that brings a similar set of rich communications features available in Mass Notification to users who frequently use smartphones and tablets. The app is available for both Android and iOS platforms. • Users download the app from the available app store. If a specific app store is not available in your region, you must contact Everbridge Technical Support for an alternative. • Users must log in to the mobile app to use it. See Getting Started With ManageBridge.
REST API	An API provides a way for two application programs to communicate. The REST API allows your other applications to work with Everbridge automatically to launch an incident. API is a premium feature and not available for all product bundles. See the *REST Application Programming Interface Guide*.
Email Ingestion	You can integrate Everbridge Suite with a third-party alerting application. Everbridge Suite ingests an email from a third-party application, parses the email, and launches an incident. Email Ingestion is a premium Everbridge feature, and not enabled for all Everbridge organizations by default. See the *Everbridge Open User Guide.*

Launch by Phone	The ability to launch an incident by phone gives you a viable alternative to launching an incident even if you cannot access the Internet. • You must set up your organization settings in advance to enable this. • It requires assigning a numerical ID to the template.
Launch by Live Operator	You can call Everbridge Technical Support to launch an incident on your behalf. You can use this method for up to five incident launches per year. See the following Knowledge Base Article in Everbridge Support Center.

Launching Incidents Workflow

You perform some or all of the following steps when launching an Incident:

1. Consider the type of situation for which you are raising an Incident.
    - What type of Incident is this? The type of information provided in your notification may be different depending on the type of Incident.
    - How severe is this Incident? Is this Incident giving instructions for action or an advisory? Does this Incident have the potential to become more severe? In other words, you may need to update this Incident notification as the Incident progresses.
    - Who does this Incident need to go to? For example, a group of contacts or contacts in a specific location.
    - What delivery options do you want to use? For example, should this notification be a text or an email?
    - Do you want confirmation from your recipients that they received the notification and/or that they are safe or require further assistance?
2. Launch a new Incident based on a template and add your situation-specific information.
3. Send the notification to your selected contacts. Data is collected about how, when, and if they receive the message.
4. Manage the Incident. For example, you send updates or send new Incident notifications as your situation changes.
5. When a situation is over, close the Incident.
6. Review Incident history.
7. Export report data to analyze and review performance and trends over a period of time.

For example:

- You receive an alert about a weather event affecting your county. You can send a standard Incident notification to warn your residents of the situation.
- You can send updates throughout the day to keep them informed. For example, you can advise them on the expected start time and end time of the weather event and advise them of any evacuation plans.

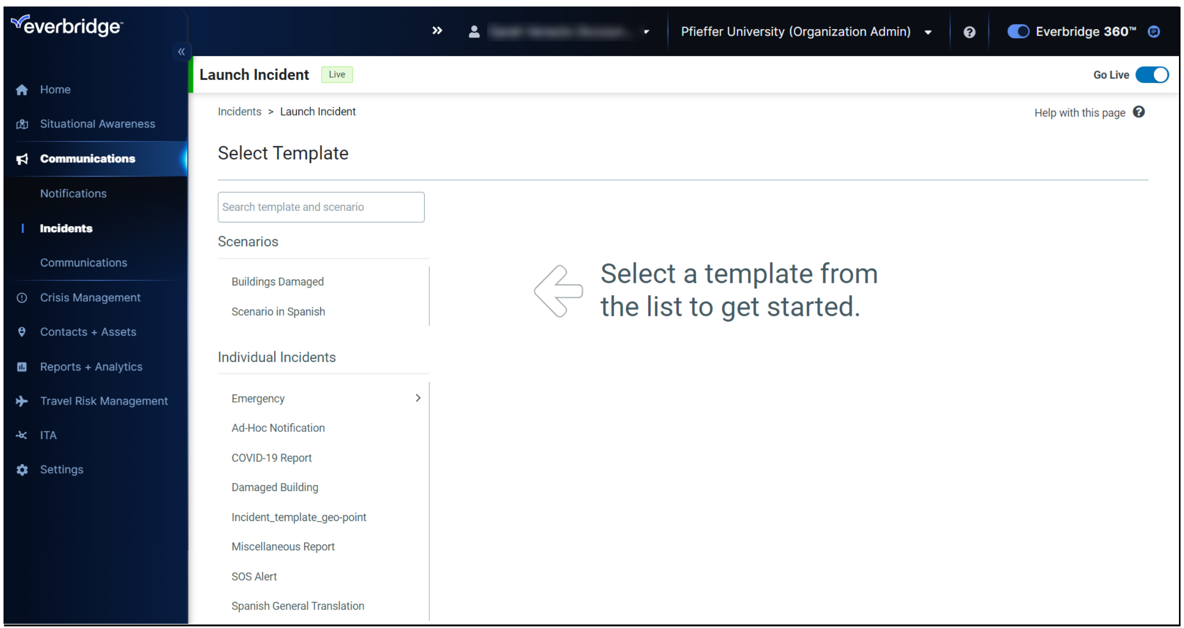
Launching an Incident

In Everbridge Suite, templates are already set up for you to choose from when a situation arises.

Launching an Incident From Everbridge Suite

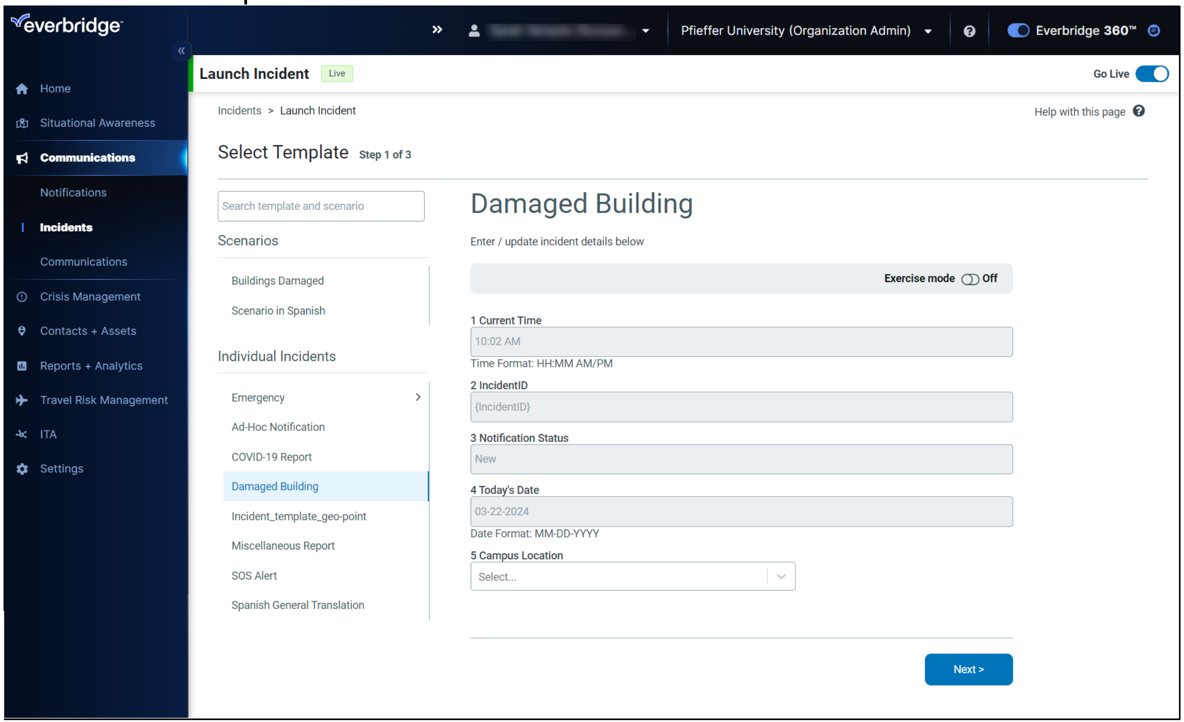
Everbridge Manager Portal is accessed online through a web browser. See Logging into Everbridge Suite.

1. From **Incidents**, click **Launch Incident**. The **Launch Incident** page is displayed. The scenarios and templates you have available are listed in alphabetical order. Optionally, if you know the name of your Incident template, type it in the **Search** box.



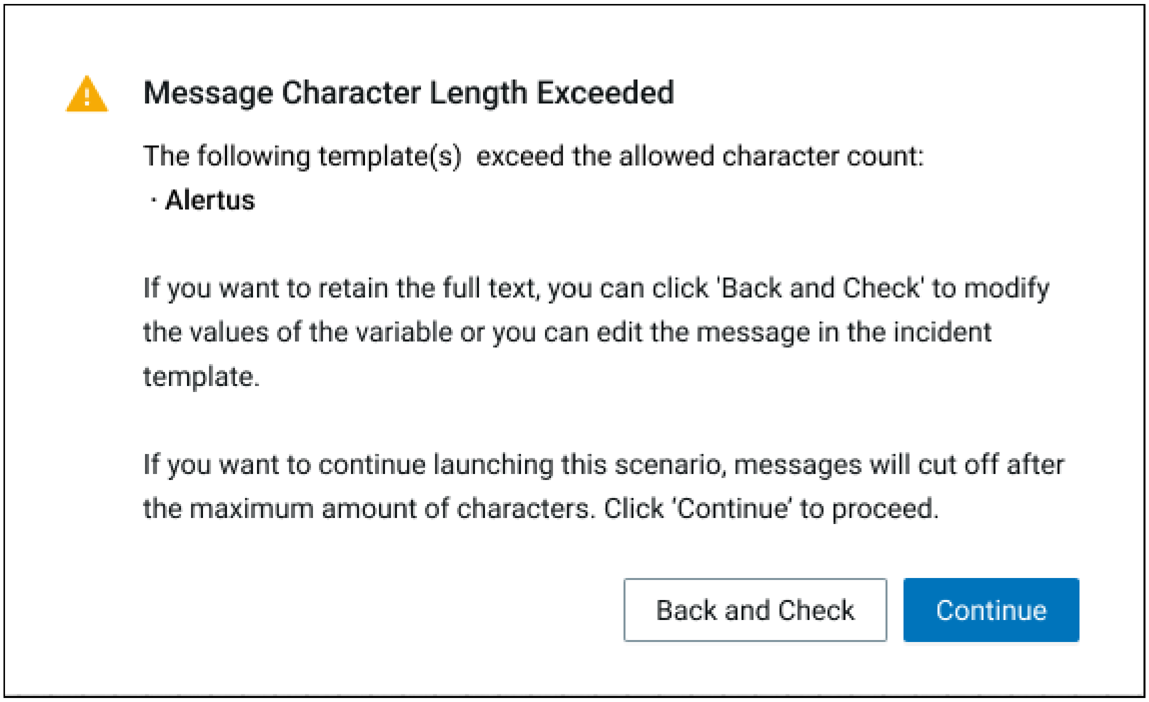
2. Select the desired Incident template by clicking its name. The **Template Form** displays. If your Incident template is not displayed, it could be because you need to change the status of the Incident template to **Live**, or you may need to add this template to your role. If this is a scenario, then you can send

all included templates with one click.



3. If you have the necessary permissions and want to make some changes to your templates before you send your scenario, you must open the individual templates, edit and save your changes, then launch your scenario. See Completing Incident Notification Template Form.

If the message exceeds the maximum length of the SMS field, it will be truncated after the maximum number of characters has been reached by clicking **Continue**. Alternatively, the user can click **Back and Check** to shorten the message.



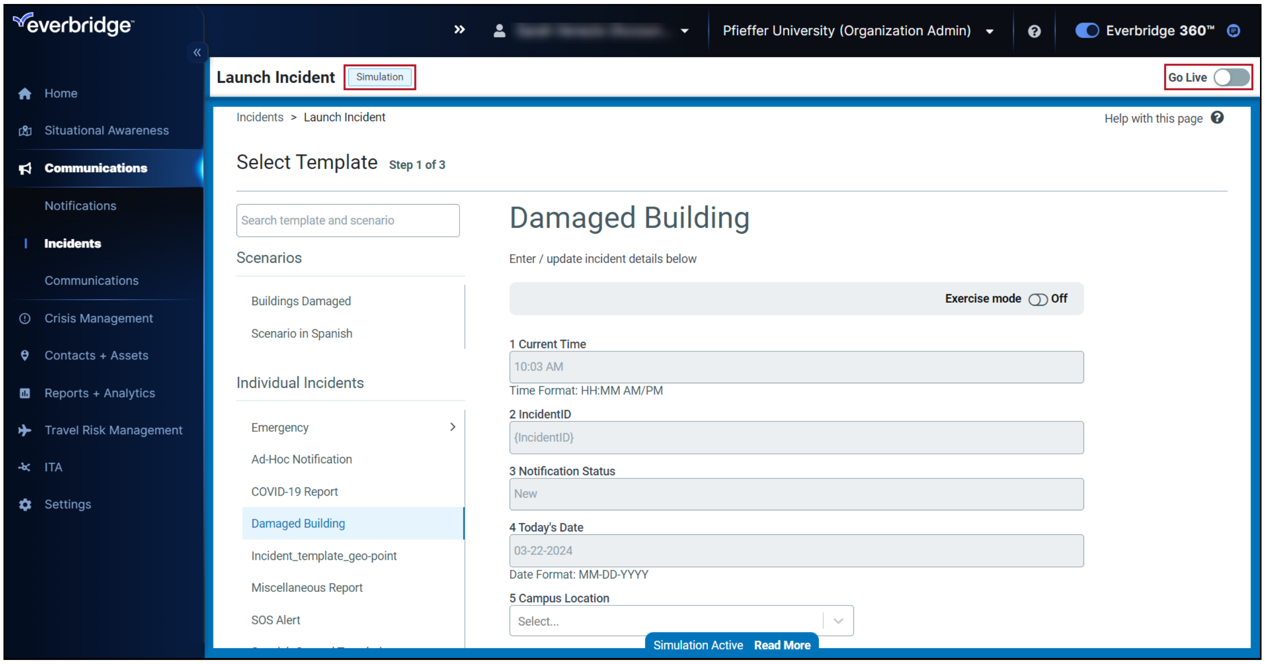
Simulation Mode

If you're new to launching Incidents and Notifications or just want some extra practice, you can use **Simulation Mode** to simulate the entire workflow from start to finish without a message actually being sent out. This is a great way to train users without incurring any extra costs to a company's Global Messaging Credit. Administrators can also restrict certain roles from sending Notifications outside of Simulation Mode until they're ready to start sending real ones.

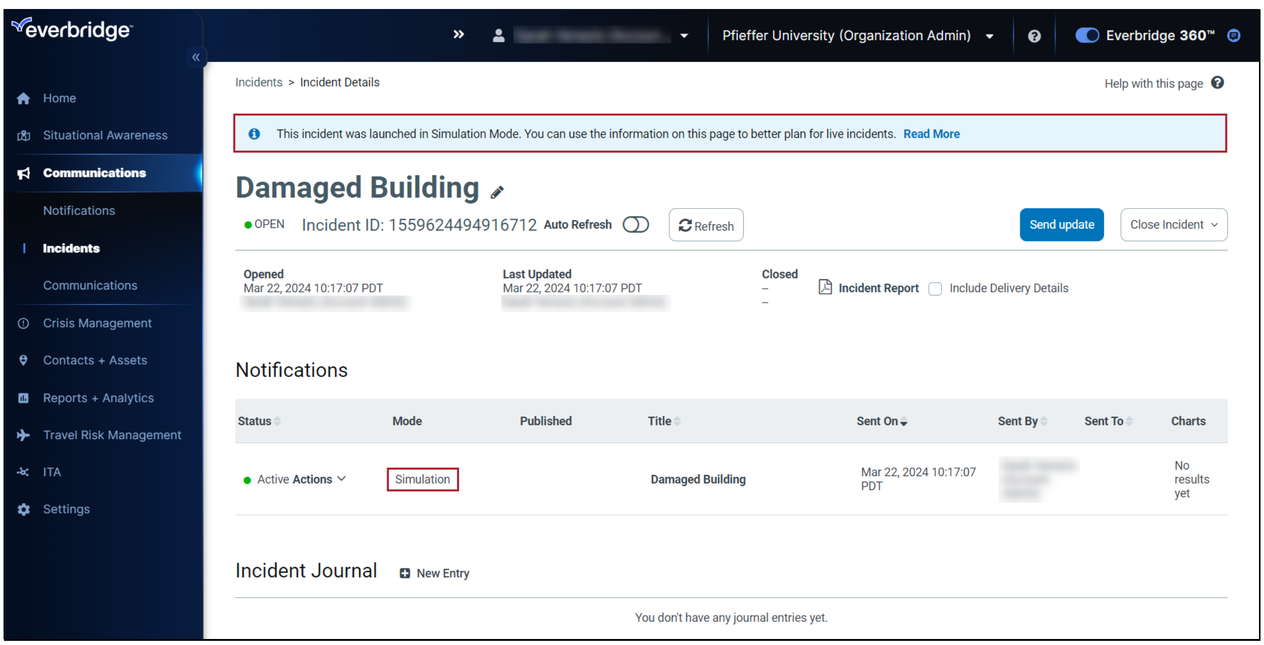
This feature is disabled by default and needs to be enabled by an Account or Organization Admin under **Settings** > **Organization**> **Notifications** > **Default Options.**

Once that's been done, users can toggle the **Go Live** button off in the upper-right corner of the Launch Incident page to turn on Simulation Mode.

A blue border will appear around the page and the **Simulation** tag will appear to indicate that Simulation Mode is in use.



Incidents that were sent in Simulation Mode will be specified as such under the **Mode** column on the **Incident Details** page. The banner at the top will also state that this was sent in Simulation Mode.



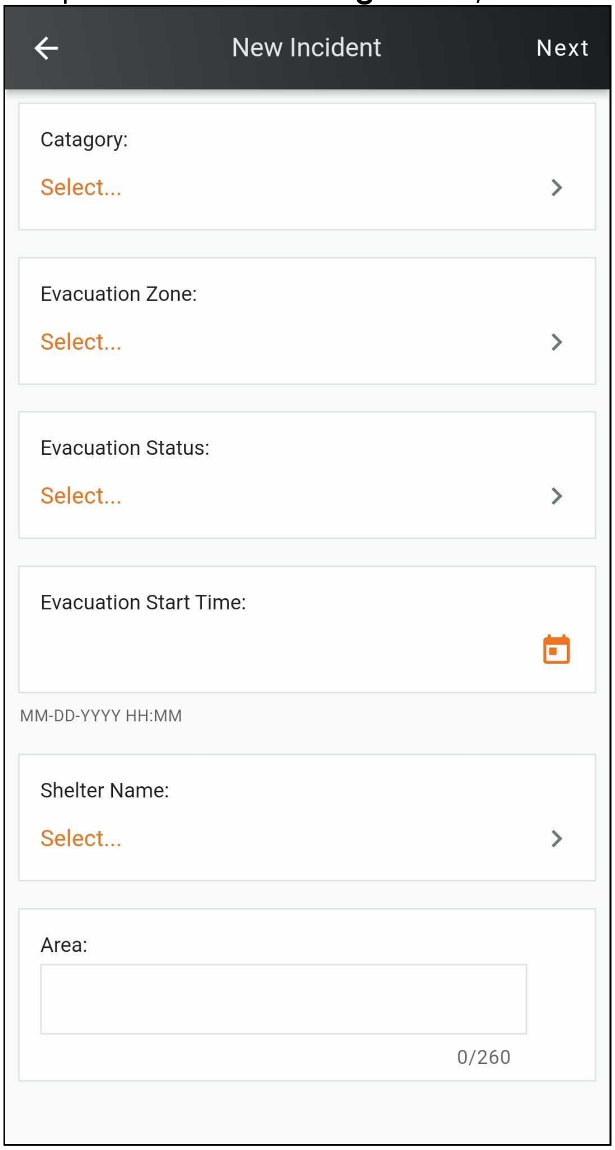
Launching a New Incident From ManageBridge

Users can perform all of the tasks surrounding the sending and monitoring of Incidents from ManageBridge that they would within the desktop Manager Portal.

To launch a new Incident from ManageBridge App:

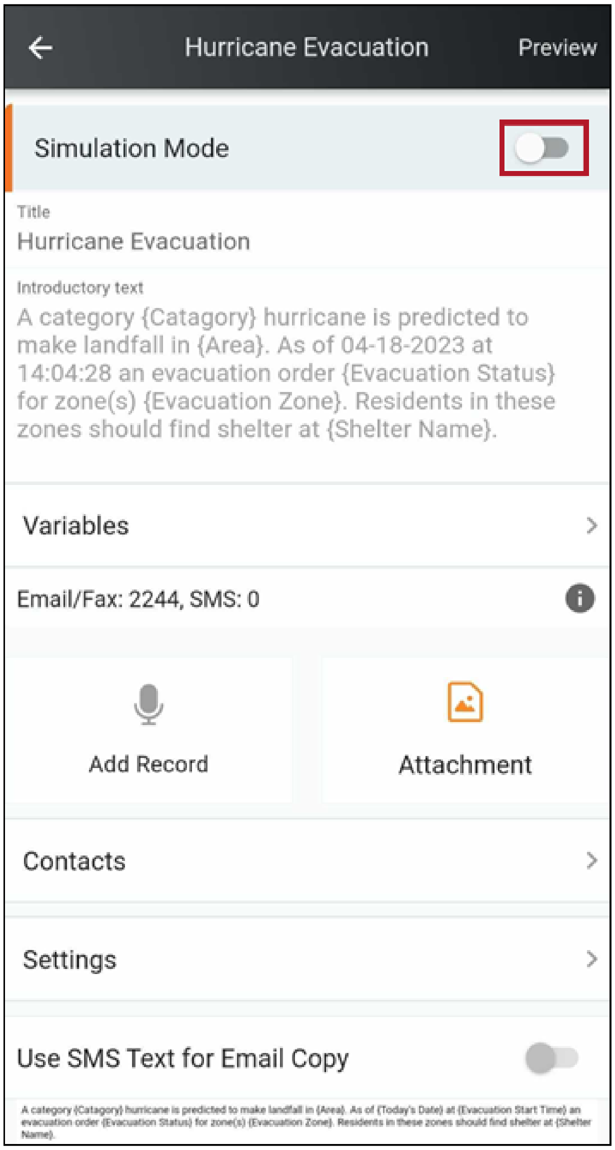
1. Tap the **Incidents** tile from the home menu. You'll arrive in the **Incidents** section.
2. Select an **Incident Template** under the **Templates** tab. Note that this differs from the desktop version of the Manager Portal in that a template **must** be selected when sending an Incident from ManageBridge.
    - Organizations may want to consider creating a basic ad hoc Incident template to be quickly used in ManageBridge when preexisting templates don't apply to a specific situation.

3. Fill in the variable fields of the selected Incident template. We used a template called **Flooding** below, which calls for local evacuations.



4. Tap **Next** to proceed to the next page, where more details and settings can be configured. If needed, when enabled to send this Incident as a test, toggle

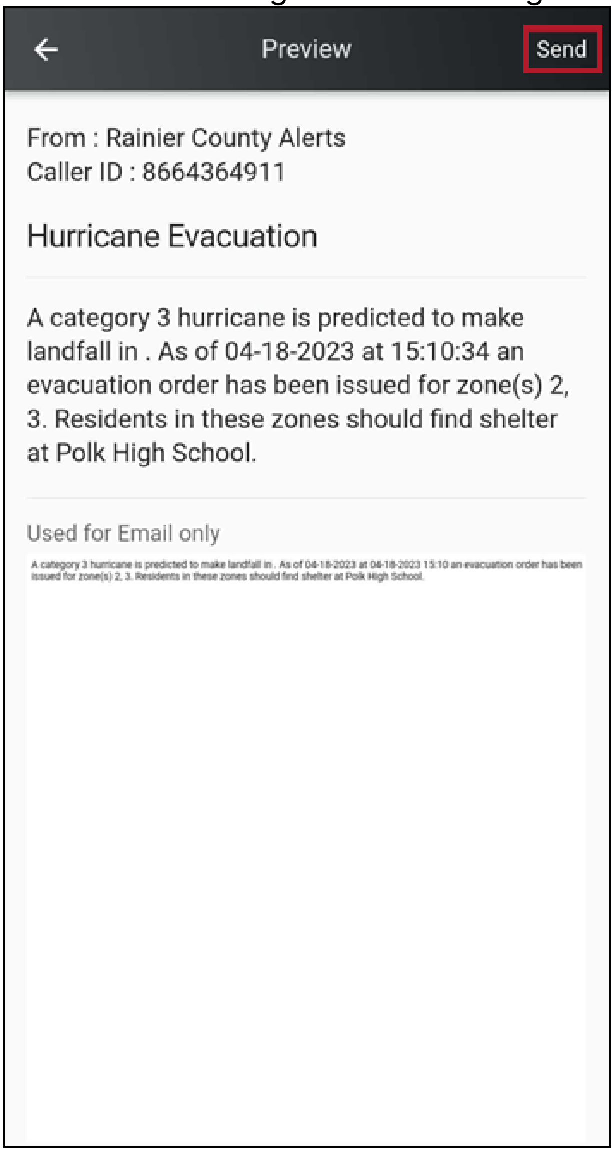
the **Simulation Mode** button **ON** at the top of the page.



5. Tap **Variables** to review the variables established on the previous page and make any adjustments as needed.
6. If desired, tap **Add Record** to record a voice message, or tap **Attachment** to add a file.
7. Tap **Contacts** to review the recipients of this Incident.
8. Adjust the Incident's settings by tapping **Settings** and specifying the following options:
   - Imminent threat to life (Yes/No)
   - Priority Notification (Yes/No)
   - Hide list of variables (Yes/No)
   - Close after sending (Yes/No)
   - Use custom SMS Message (Yes/No)
   - Delivery Methods
     - All Contact Paths

    - Text Paths
    - Voice Paths
    - Everbridge Mobile App
    - Primary SMS
    - Primary Email
    - Primary Mobile Phone
- Sender Information
    - Sender Email
    - Sender Caller ID
- Voicemail Preference
    - Message Only
    - No Message
    - Message with Confirmation
- Confirm (Yes/No)
- Delivery Throttling (Yes/No)
- Member App Settings
    - Request Location (Yes/No)
    - Request Image (Yes/No)
    - Request Additional Info (Yes/No)
    - Enable Sharing Options (Yes/No)
- Additional Notification Settings
    - Language
    - Duration
    - Contact Cycles
    - Cycle Interval
    - Path Interval

9. Once the settings have been specified, tap **Preview** in the top-right corner to review the message before sending it.



10. If everything looks correct in the Preview, tap **Send**.

Completing the Incident Notification Template Form

Once you have chosen your template, you need to populate the information in the variable information fields of your template form. This information is used to automatically populate the Notification message.

Variables are created and added by the Incident Administrator. To complete the Incident Notification template form:

1. Complete the fields with your situation-specific information. The available fields depend on how the template has been created by your Incident Administrator.
    - If this Incident is a drill, toggle **Exercise Mode.** The word **DRILL** is prepended to the message title and message text. (When **Exercise Mode** is on, you can only use **Test** mode for IPAWS. **Live** mode is disabled.)

      > **NOTE:** IPAWS is a United States national system for local alerting and is only available for authorized US-based public agencies.

    - Required fields are indicated with *.
    - Fields in white are editable. Fields in gray cannot be changed.
2. Click **Next**.

Completing an Incident Notification Message

You may not have access to change the following options at the time of launching. Some templates may already have predefined selections. Even if you do not have access to change the information or some of the information already exists, it is important that you understand how these options affect an Incident. An overview of the steps you perform when completing an Incident Notification message is described below.

1. Type your message. Some templates may already have a predefined message. However, if this option is available you can edit a message. For example, you may want to amend a title or add a link to another resource that recipients can look at for more information. See Configuring Message.
2. Select your contacts. As well as the predefined contacts for this template, for example, you may decide you want to send this Incident to senior management. This allows senior management to monitor status and recovery progress, without disrupting the response team. See Selecting Contacts.
3. Select your publishing options. Push or post Notification to additional outlets. See Publishing Options.
4. Configure settings. You may need to change some of the default settings. See Editing Settings.
5. Review your Incident Notification. See Sending an Incident Notification.
6. Send your Notification. See Sending an Incident Notification.

Configuring Message

To edit a message:

1. You can select either
   - **Imminent Threat to Life (if enabled for Organization)**. Notifications flagged with Imminent Threat to Life (ITL) mean the event, Incident or emergency:
     - has just occurred (for example, an earthquake, volcanic eruption or failed life-support system), or
     - is in-progress (for example, an active shooter or nuclear power plant emergency), or
     - is expected to happen today (for example, severe weather), or
     - the lives or safety of message recipients are immediately at risk.
     - (*only applies to Apple/iOS devices*) becomes a critical alert when the message is sent to Everbridge Mobile App. Critical alerts:
       - make an audio sound when delivered, even if your device is on silent. (If your device is not on silent, the audio tone is based on your selections in app settings).
       - are displayed until you tap on it

        - are displayed with a warning icon

    An Active Shooter event in the proximity of a recipient's location or a life-threatening weather event, are examples of ITL situations.

    The following Notifications are not considered **Imminent Threat to Life**.

        - Notifications to recipients to inform them of an active shooter at another location, a weather event that will impact a different location, or a weather event that is still days away.
        - Notifications sent after the initial ITL message UNLESS there is a material change from the initial Notification AND the change results in an immediate increased risk to life and safety.
        - Notifications sent to recipients who are not at risk for life and safety regardless of the type of Incident.

    - **High Priority**. High priority messages are given priority in your message queue and are flagged in your recipients' inbox.

2. In **Title**, you can amend the title of your message. When a Notification is sent, the title of the Notification becomes your Incident name. The Incident name is copied from the title of the first Notification and is not modified in subsequent phases. You can manually edit the title later.

    NOTE: The title of the message can contain up to 255 characters.

3. You can use the same text for all your delivery methods or you can choose to have separate text for SMS, fax, pager, text-to-speech, and email. Everbridge recommends you always send custom messages per delivery method, if possible. This helps to avoid message fatigue and enables contacts to consume messages in the most efficient way possible, per device.

    - **Use custom SMS Message** - by default, the same text is used for SMS, fax, pager and text-to-speech. If you want to use a separate SMS message from fax, pager and text-to-speech, select **Use custom SMS Message**. Text is limited to 160 characters.

        - If your Organization has enabled a message prefix, select **Message Prefix**. The prefix appears as the first item in your SMS message. Your Organization configures the prefix, and the number of characters counts against the 160 character limit.
        - Optionally, select **Add Web Page Message**. When this check box is selected, a link is added to the end of your SMS to view your Web Page message. Type and format your Web Page message.

Button/ Icon	Description

Undo/ Redo	• Undo reverses the previous action. • Redo restores any actions that were previously undone.
Formatting	• B—Bold • I—Italics • U—Underscore
Fonts	• A—Select the desired font color from the drop-down list • Pen—Select the desired background color from the drop-down list • System Font is the default. Click the down arrow to select the desired font.
Font Size	12 pt is the default. Click the down arrow to select the desired font size.
...	More—Click to see additional styles.
Paragraph	Click the down arrow to select a Paragraph style such as Paragraph (Normal or Body) or Heading 1.
Alignment	• Left-Justified • Centered • Align-Right • Justified
Link Unlink	• Insert/Edit Link • Remove link
Image	Insert/Edit Image
Table	• Insert a table • Cell properties • Row properties • Column properties • Table properties • Delete table
Paste as Text	Copy and paste from other editors, and it pastes as plain text
Ordered List	Select the type of ordered list you want
Bulleted Items	Select the type of bullets you want
Decrease Indent	Move left
Increase Indent	Move right

-	
S	Strikethrough
—	Line separator
Tx	Clear formatting
<>	Source Code
Preview	Preview

- **Include a separate message for email Notifications** - select this to create a custom message for your email delivery method. For example, you may want to include a link to another resource that a contact can look at for more information. You can either copy and paste items from an external source, such as a web site or Microsoft Word or external editors or type your message directly into the **Email, Everbridge Mobile App** pane. You can customize the email with text formatting features such as images, color, tables, and so forth. You can insert **Information Variable** tokens in your custom email content. The custom email is delivered to Everbridge Mobile App users as an attachment.
  See Formatting an Email.

4. Select **Hide list of variables** if you do not want see the list of variables you have configured for this Incident to be displayed in your message. For example, if you are sending an Incident Notification to employees, it might be better to hide the list of variables and use a message. However, if you are working with a response team that is used to seeing what is going on as a quick list, you can clear **Hide list of variables** and those recipients can view the information as a list instead.
5. From **Speech**, select one of the following options.
   - **Text-to-speech**. Select this if you want to convert the text of your message into speech for delivery methods with audio. This converts text entered in the message body into an audio file for use with any phone delivery method. The language of the **Text-to-Speech** preview is the language selected as the default language, or the language selected in **Settings** of the Notification form. Select the speaker icon to hear the recording. (Separate email content is not utilized for Text-to-Speech.)
   - **Use a voice recording**. Select this to add a recording of a trusted voice. You can choose to:
     - **Use Everbridge recorder**. Select **Start** to record your message using your computer microphone. Your recording must be less than 5-minutes in length.
     - **Use a telephone**. Select **Recording Instructions** and follow the instructions provided by Organization Administrator. If you are using a poll, set up your poll first, then record to allow for poll responses over the phone.

- **Upload a file**. Select **Upload a file** to upload a prerecorded file. The recommended format is 8KHz,8 bit mono u-law or uncompressed PCM WAV and less than 5 minutes in length.)

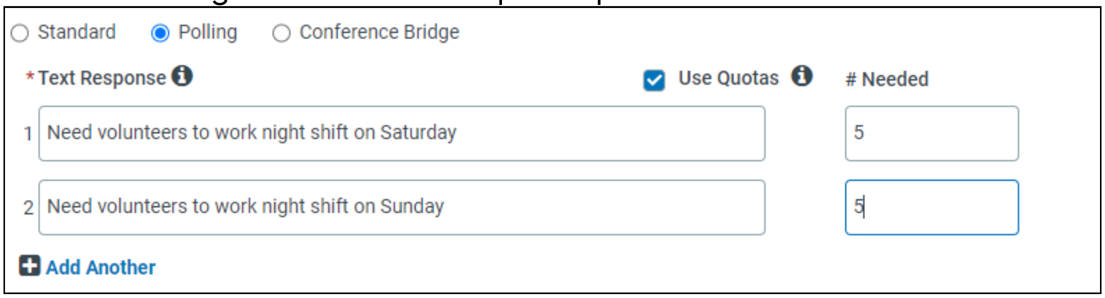
  > **CAUTION:** The file cannot exceed 2.4 MB; otherwise, you must reduce the file size and upload it again.

  Everbridge can also convert the following file formats:
  - 8K Hz 8 bit PCM
  - 8K Hz 16 bit PCM
  - 8K Hz 4 bit ADPCM
  - 8K Hz GSM 06.108K Hz mu-Law
  - 11K Hz 8 bit PCM
  - 11K Hz 16 bit PCM
  - 11K Hz 4 bit ADPCM
  - 11K Hz GSM 06.10
  - 11k Hz mu-Law

6. Notifications come in three different types. From **Message Type**, you can select
   - **Standard**. A basic alert message.
   - **Polling**. In a polling message, you can add options for your contacts to respond to a list of choices. You can see the options they choose in **Broadcast Results**. This is useful if your Notification requires your recipients to perform an action. Your recipients can select an option once an action has been performed and you can see the results 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.

     Select **Use Quotas** if you want to add options for contacts to respond to a list of choices and then you send a Follow-Up message to those available to work with additional information, such as when and where to report. For example, if you need five volunteers to work the graveyard shift on Saturday and Sunday, you can type **Need 5 volunteers to work night shift on Saturday** and **Need 5 volunteers to work night shift on Sunday. Broadcast Results** show which contacts are willing to work. You can then send a follow-up letting everyone know who is working. You can also stop the quota.



The following is the call flow when a polling message is sent:

  - The Voice platform connects the call.
  - The Voice platform detects a human (recipient answers the phone).
  - The application prompts the user to select an option.
  - The application plays an audio file of the polling options.
  - The application plays the prompt, “To replay this message, press Star”.
  - The recipient presses the Star key and the message and options are replayed.
  - Alternate path: The recipient does not press a key, pausing 3 or 4 seconds after listening to the polling options; the application assumes it has been interacting with voice mail and leaves a greeting, a call back phone number, and message ID.

- **Conference Bridge**. The contact is able to connect to a conference bridge upon receiving the Notification. 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. See Using a Smart Conference Bridge from an Incident.

7. Select **Attach Files** to attach up to 5 files to a message. The maximum file size is 20 MB. If an attachment is more than 2 MB, it will be sent as a link in the Notification. Each filename should be no more than 80 characters. You can attach files if the Notification is to be sent via email, Everbridge Mobile App, or fax.

   If the Notification is to be sent via fax, then ensure you are using file types that are receivable via a fax transmission (for example, no audio files). Fax attachment files should not contain macros or complicated formatting; Everbridge accept 178 different document types including the more commonly-used formats such as Microsoft Word, Microsoft Excel, PDF, and HTML.

8. Optionally, if your Incident Administrator has configured additional publishing options, you may be able to choose additional publishing options, for example, social media, CAP RSS Feed, Alertus, and more. Only options chosen in the template are editable. Select the desired **Publishing Option** check box. If the check box is gray, the **Publishing Options** have been predefined by your administrators.

Option	Description
Everbridge Desktop Alerts	Send a Standard message as a full-screen Notification sent directly to your recipients' desktops.
Everbridge Network	Post your Notifications to the Organizations and or areas you have indicated.
Everbridge Web Widget	Configuring an Everbridge Web Widget URL, you can send a Notification to your designated website.
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.
Social Media	Post your Notifications to Twitter and/or Facebook accounts. Select the linked accounts from the drop-down lists. (The accounts are linked in **Settings** > **Organization** > **Publishing Options** > **Social Media**.) Twitter supports 280 characters. If your message text is longer, Everbridge posts only the first 280 characters to Twitter.
CAP - IPAWS Wireless Emergency Alerts (WEA)	See IPAWS Overview.
CAP - IPAWS Emergency Alert System (EAS)	See IPAWS Overview.
CAP - IPAWS COG-to-COG (CAPEXCH)	See IPAWS Overview.

CAP - IPAWS Non-Weather Emergency Alert (NWEM)	See IPAWS Overview.
CAP - PUBLIC Feed	See IPAWS Overview.
CAP RSS Feed	See *Notifications.*
Google Public Alerts	See *Notifications.*
Nixle Channels	For Community Engagement, the contacts must opt into receiving messages from their Nixle accounts. a. Select the message type: **Alert**, **Advisory**, or **Community**. b. Fill in the fields for the **Expires in (hours)** and **SMS Message**. c. Select the appropriate Send To check box or checkboxes. d. From the **Send To** pane, select the **Impacted Area**.
A City/Town, County, or ZIP Code within my jurisdiction	Type the impacted area or use polygons to identify the list of ZIP codes from the map.
My entire jurisdiction	Select this radio button if you want your entire jurisdiction to receive to receive the Nixle message.
Include contact information specific to this message	1. Click the Right Triangle to display fields to complete. • Name • Title/Department • Phone Number, • Email Address 2. From **Event Subscribers** pane, select the event to be included in the Notification. Events are set up in **Settings** > **Contacts** and **Groups** > **Event Subscriptions**. 3. Optionally, select **Apply geographic filtering to event groups**. By default, geographic filtering applies to your Community Subscribers only. By selecting this option, you target: ▪ Event Subscribers who are within an overlapping ZIP code and ▪ Event Subscribers who have not provided their ZIP code.

Member Portal	Send your standard Notification to the Member Portal members. Polling and Conference Bridge Notifications are not supported.
Audio Bulletin Board	The contacts can listen to messages on the Audio Bulletin Board.
Audio Bulletin Board Basic	Select the Audio Source and the Expiration time: • no expiration • 1-24 days (maximum 24 days) • 1-576 hours (minimum 1 hour)
Audio Bulletin Board Premium	In addition to the **Basic** selections above, select the Audio Bulletin Board name from the drop-down list.
CAP RSS	If needed, you can select the CAP RSS publishing option.
Google Public Alerts	If needed, you can select Google Public Alerts, then enter the details in the CAP CHANNELS (GOOGLE PUBLIC ALERTS) fields.

Selecting Contacts

To configure your contacts:

1. From **Contacts**, you can configure who you want to send an Incident to.

   An Incident Notification may already have some predefined contacts. However, in the moment and if permitted, you may want to add more contacts to an Incident depending on the situation. Depending on your requirements, select the individuals and groups you want to send an Incident to.

   - **Individuals**. Click **Individuals** to select individuals by name.
   - **Groups**. Click **Groups** to select groups your Organization has created. Sequenced Groups are indicated by the Sequenced Group icon (silhouettes and arrow). The order of the contacts in the Sequenced Group is the order in which they will be contacted. If there are two Sequenced Groups, for example, contact #1 from each group is notified in parallel, then after the listed wait time, contact #2 from each group is sent the Notification, and so forth. When the number of replies is met, no other contacts are notified.
   - **Rules**. Click **Rules** to apply rules your Organization has defined to select contacts with certain attributes. Rules are preconfigured by your Incident Administrator.
   - **Map**. Select **Map** to select contacts by their location on the map. For example, you can draw a circle around the location that includes the contacts in the database who have an address in the circle.

a. To start drawing the shape, click **Select Contacts > Search** and type an address that will be the center of the shape.
b. Click **Search** to the right of the address you just typed. Addresses matching your search are displayed.
c. Select the desired address. Alternatively, zoom into the area that you want to select contacts from.
d. Set a marker on the map with a radius, and click **Show on map.**
e. Close the **Search** overlay.
f. Draw a shape around the location of the Incident to include those contacts within that geographic location. Alternatively, select a preconfigured shape from your shape library. Shapes in the Shape Library are preconfigured by your Incident Administrator.
g. Once you have selected your contacts, click **Select**. You see the count for each contact category.
h. Select **Preview** from the individual subtabs to see the specific contacts you have selected.
i. Select **OK** to save and close the **Contacts** dialog.
j. Optionally, select **Preview contacts** to review the contacts you have selected. You see the names of all the contacts you have selected, whether as individuals, from a group, a rule, and/or from the map. When previewing group names that have linked calendars, only the group contacts when either, the group calendar option is clear or no staff is on shift at the time of the preview are listed. Selecting **Preview Contacts** after selecting contacts from the map (or selecting **Preview from the Map** subtab), you can also select a location: **Static**, **Last Known,** or **Expected**.

2. Expand **More Options**. You can select from the following options.

Option	Description
Send to linked calendar for all selected groups	If the groups you selected are linked to a calendar, then an Incident is sent to the contacts based on their calendar. This applies to static groups and conditional groups. (Escalation levels have their own group calendar option.) As you preview the group names, you see the individuals belonging to the groups. However, only the individuals on-shift are sent the Notification. If the calendar shift is not staffed, the Notification is sent to the entire group. This applies to all groups. If a group is a linked group calendar with a shift on-call that is also linked to a sequence group, then the contacts selected are those who are staffed on the shift, not the sequence group. If there is no staff on the

	shift at the time the Notification is sent, the sequence group contacts are used.
Send to Incident subscribers	If you have configured Incident subscriptions and included the identical variables in your Incident template, then, when the Notification is sent, the Incident includes the subscribers as well as the contacts in the template. Subscribers can be from the Manager Portal and the Member Portal. When this sending option is selected, you can also send follow-up Notifications.
Use map shape as an Incident Zone	All contacts who are in or enter the area defined by your shape files receive this message.
Sequencing	If your Organization has enabled **Sequenced Groups**, you can take advantage of sequenced groups (where your contacts are sent a Notification, in order, until a specified number of contacts has replied). If your rule uses a Sequenced Group, **Sequencing | Edit** is displayed. 1. Select **Edit**. 2. From the **Sequencing** field, toggle sequencing **ON**. 3. As needed, change the **Wait Time** (the default is five minutes). The Wait Time is the escalation time between each contact in any targeted shifts. the wait time can be adjusted to any number between 1 and 1440 minutes or a maximum of 24 hours. If there are multiple layers in the targeted shift, escalation from the last contact of a layer to the first contact of the next layer follow the escalation wait time defined in the template. 4. Set the number for the **Default Responses Needed** so that you do not need to change it each time in the template. Setting this number can also be used for groups where Sequencing is turned off, then on again. For example, if you set up a rule that uses a calendar filter with **On Shift** set to **Now**, the contacts returned is different each time, depending on the time of day. 5. In **Responses Needed**, enter the number of responses needed before the Notification ends. (The default is one response.)

	If you are using Notification escalation, the **Total Responses Needed** is dependent on Sequenced Groups and regular contacts. In other words, responses from both Sequenced Groups and normal Contacts count toward the **Total Responses Needed**. 6. Under the **Group Name**, you see how the sequenced group was added - manually or via [*Rule Name*].
Split Notification for each group	When sent, the Notification is separated for each group. For example, if you selected two groups, **Incident Details** shows two separate Notifications. Other contact types are included in a single Notification. You cannot split Notifications for **Send Follow Up** or **Scenarios**.

Editing Settings

1. From **Settings**, you can choose how an Incident is sent. Most of these are preconfigured.

   TIP: If a setting has a **View** link, hover the mouse over the link to see the details.

Option	Description
Sender E-Mail Display	Allows you to change the address to something that is recognizable to the contacts, so they are more likely to open it.
Sender caller ID	Allows you to change the phone number that your contacts see displayed when they receive a Notification via phone.
Request Confirmation	Allows you to request that your contacts confirm that they have received the message. It also stops any further attempts to reach them with a Notification.
Delivery Methods	Delivery methods are the ways that your contacts receive a Notification.

2. Select **More Options**.

Option	Description

Delivery Order	Allows you to select the order of the delivery methods used for the Notification.
Interval between Delivery methods	Controls how long the system waits before moving on to the next delivery method for a contact.
Broadcast duration	Controls how long the Notification is active to send messages and receive confirmations.
Contact cycles	Controls how many times Everbridge attempts to deliver the Notification across all of the device types for the contact.
Interval between cycles	Controls how long the system waits before starting another cycle of Notification.
Reply-to-E-Mail	Allows you to set a custom email that your contacts can reply to for more information.
Apply voice delivery throttling rules	Controls the number of simultaneous phone calls made to help to avoid clogging the phone service line and risking calls not making it through to all your contacts.
Voice mail preference	Controls what Everbridge does when leaving a voice message. You can select whether to end the call, leave the message, or leave the message along with call-back information for confirming receipt.
Everbridge Mobile App Settings	Allows you to control various setting related specifically to the Everbridge Mobile App.
Response subscriptions	For details about Response Subscriptions, see *Enabling Response Subscriptions in Your Incident Templates* in the *Incident Administrator Guide*.
Invite these contacts to the Incident chat	Allows you to invite contacts to a secure chat from the details page of that Notification.
Language	Controls the language of Everbridge's voice prompts and text prompts as well as the style/tone used by the text-to-speech engine.

Sending an Incident

Once you have configured your message, contacts, and any settings, you are ready to send your Incident.

1. From **Send**, you can select:
    - **Now** to send your Notification immediately.
    - **Schedule** to schedule the Notification for a later date. Select the date and send time from the available options.

> **NOTE:** Currently, only one-time schedules at a fixed date/time are supported. You are unable to change the value in the **Repeat** drop-down field.

- Optionally, select **CLOSE Incident after a successful send** if you know there will be no updates to this Notification.

2. If your Incident Administrator has opted to add an additional Incident Notification review step to your Notifications, you can select **Review and Send** to preview and review your Incident. This allows you to quickly and easily validate that the Incident is ready to be sent. The message is displayed, as well as the distribution information. That is, the consolidated number of all contacts from individuals, groups, rules, and Incident subscribers, as well as the delivery methods. If set up by your Incident Administrator, enter a valid PIN for sending the Notification.

   If you are previewing an Incident scenario, all Incident templates for the scenario are listed in a drop-down list. You can select each template one-by-one to preview the information for the selected message. If a template has an issue, you see a message explaining the template will not be included in the launch.

3. Click **Send** to send your Notification immediately. Click **Schedule** to schedule your Notification to send at a later date.

   If you are scheduling your Notification and you click **Schedule**, you see the list of all pending schedules and the ones that could not be sent because of any errors. If you do not have permission to view all Incidents, then you only see the schedules set up by users with the same role as yours. You also have the option to delete these scheduled records from the list. If you delete a pending schedule, the Notification will not be sent.

   Click **Scheduled** to see the list of scheduled Incidents. Once an Incident is sent at the scheduled time, it is removed from the **Scheduled** list, if it has been sent successfully. The Incident is listed on the **Open/History** page.

> **NOTE:** Upon "Send", "Schedule", or "Review and Send", the message or title contains variable tokens that will be replaced for the actual value at the message delivery time. If the final delivery message character count exceeds the allowed limit, the message is truncated. If the message or title does not contain variable tokens, but the final delivery message character count exceeds the allowed character limit, the message will be delivered truncated to 2500 characters if you click Continue to proceed. You can click Cancel to adjust the message.

After you click **Send**, the **Incident Details** page is displayed. See Viewing Incident Details.

Formatting an Email

Everbridge recommends that you send custom messages per delivery method whenever possible. This helps contacts avoid message fatigue and helps them consume messages in the most efficient way possible per device.

As you add or edit a message, select **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.

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.

The formatting toolbar was tested as follows:

- Only Microsoft *Windows-based laptops* and an Apple *Mac mini* were used to test these formatting tools. The functionality of the rich text tools was not tested on tablets.
- Only the US English keyboard was tested.
- Inserting text by typing characters using native-language keyboards has not been fully tested.

When pasting content into **Email, Everbridge Mobile App**, Everbridge Suite may not produce the same results as in the external source.

- Content copied from Microsoft Office 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.

In addition, content created in the **Email, Everbridge Mobile App** pane may not be preserved in its original format when copied to a third-party application.

Other considerations include:

- The maximum amount of content that can be saved and used in the **Email, Everbridge Mobile App** field is 1 MB; Everbridge Suite does not currently display a character or content counter. You see a message only when you

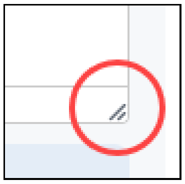
have more than 1 MB of content when you attempt to **Save**, **Schedule**, or **Send the Notification**. (Image file sizes are excluded from the maximum **Custom Email** content size of 1 MB.)
- You must enter at least one character in the plain-text Body field even if you do not want to use those delivery methods.
- Only the content of the plain-text field appears in the **Message Body** element of all reports; the content of the **Email, Everbridge Mobile App** pane is available on all reports in a separate field.
- 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, Everbridge Mobile App** pane
- 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, Everbridge Mobile App** pane. The Everbridge Suite application automatically inserts your custom header and footer when sending the email message.

To do this:

1. Select **Include a separate message for email Notifications**. The application displays a large text field below the existing text fields.

   > **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.

2. Scroll down to **Email, Everbridge Mobile App**. A new template displays the Rich Text Format editor above.
   - If an existing template had a custom message created from the earlier Rich Text Format (RTF) editor, you can choose to continue to use that editor. Select the **Expand** link to open the **Custom Email** window and work.
   - Or, you can select the **Clear Contents** link to clear the custom message from the earlier RTF editor.
   - Alternatively, select the link: **Switch to New Text Editor**. Switching text editors might change the display style of the existing message. Review your message to ensure its accuracy. When the template is saved, your message is saved in the RTF editor you last used.
3. Click ... (ellipsis) to access other formatting tools.
4. You can expand the pane to make it larger.



5. Click in the body area to add your custom Email or Everbridge Mobile App message. The formatting tools are available from the **Email, Everbridge Mobile App** pane. Hover the mouse over each tool to see the bubble label.
6. Type your text and click the desired formatting tool.

Using Images

Although, you can copy and paste images from an external source (except Microsoft Word), Everbridge recommends you use **Insert/edit image** from the formatting toolbar for the best results. You can either:

- enter a URL address to retrieve an image from an Internet-accessible server
- choose a file from your computing device

To do this:

1. Select **Insert/edit image**.
2. Do one of the following:
    - **General**—Fill in the information fields.
    - **Upload**—Drag-and-drop the image onto the window or browse for the image.
3. Click **Save**.

Using Tables

The most straightforward way to enter a table is to copy/paste from an external source such as Microsoft Word. 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, Everbridge Mobile App** pane. Alternatively, insert a table directly.

1. Place the mouse cursor where you want the table.
2. Select **Table.**
3. Select the cells (columns and rows) of your table.
4. Click the table to display the properties you can change. You can also make the same changes by clicking **Table** again.

Converting Text to HTML

Converting your text to HTML gives you the ability to quickly and easily change the format of text and gives you greater control over the format of your text.

1. Using the **Email, Everbridge Mobile App** pane, enter your text.
2. Click < >. The **Source Code** dialog displays your text in HTML.
3. Click **Save**.

Copying Content 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 **Paste as Text**.

1. Select **Paste as Text**.
2. Copy the desired text from your external source.
3. Paste directly into the message window.

Managing Incident Zones

If available to your Organization, an administrator (for example, Account Administrator, Organization Administrator, and Incident Administrator) role can configure a Notification to manage an Incident Zone. If given permission, an Incident Operator can also manage an Incident Zone.

There is one type of Incident Zone:

- Anonymous Contacts (Public Incident Zone)—Public Incident Zones are used by State and Local Governments, where the end-user locations are anonymous.

To see which Incident Zone is enabled for your Organization, navigate to **Settings**, then click **Organization** > **Base Information**.

To manage Incident Zones:

1. If available to your Organization, map your Incident Zone by placing at least one polygon on the map. See Selecting Contacts.
    - **Public Incident Zone**—The Everbridge Mobile Safety App delivery method is required and automatically selected for the Notification with a contact cycle value as 1, which cannot be changed. Anyone with the Everbridge Mobile Safety App in location sharing mode will receive the push Notification if they are either in the Incident Zone or enter into the Zone while the Zone is active.
2. Select **Use map shape as an Incident Zone**.
3. Review the following notes:
    - Public agencies using public Incident Zones reach anyone in their shapes via the Everbridge Mobile App.
    - Private Organizations using private Incident Zones launch an Incident to contacts registered with their Organization's credentials via the Everbridge Mobile App and selected delivery methods for that Incident.
    - If the Notification is scheduled with Incident Zone, stopping the Notification cancels the Incident Zone broadcast.
    - While launching a Notification with the **Incident Zone** flag on, a **Confirm** dialog is displayed. The message in the Incident **Zone Confirmation** dialog differs depending if you have a private or public Incident Zone.

Using Conference Bridge Calls

You can create a conference notification to send now, schedule for later, that is recurring, or via a notification template. Everbridge recommends that an SMS message with the conference call details is always sent first. That way, if there is a connection issue, then the contacts have the necessary information to manually call in.

Another best practice when messaging contacts is to include information such as, **If you are contacted for an emergency conference call, join the bridge and are not joined within 60 seconds by other participants, you should access your SMS or email and attempt a manual call in**.

As each of your contacts is placed into a conference bridge, the parties online hear the joining tone. Everbridge recommends that all parties self-mute until the organizer joins and requests a roll call.

When taking part in a conference call, Everbridge recommends:

- Non-speakers should keep themselves muted.
- Recipients should not place themselves on hold as the hold music will be heard by all of the recipients.
- Speakerphones should be used with discretion; outside noises may be picked up and are distracting.
- Phones that are in use in close proximity to each other should be muted so that there are minimal chances for reverberation and other outside noises.
- The maximum number of participants for Custom and Smart Conference Bridges is 250; Standard Conference Bridges have a maximum of 96 participants. Custom Conference Bridges must be able to support up to 250 participants.
- All notification recipients are on the Smart Conference participant list and can join the conference provided the conference has not reached its participant limit.
- The maximum number of concurrent conference bridges in play is 50 (simultaneously).

Launching an Incident with a Conference Call Message Type

If you selected **Conference Bridge** when launching an incident, a contact is able to connect to a conference bridge upon receiving the notification.

1. From the **Message Type** of your Incident Template, select **Conference Bridge**.

2. From the drop-down list, select the conference bridge name. If it has **In Use** added to the bridge name, it means the conference is in session now. You can join the live conference.
3. Select or clear the following check boxes, as needed:
   - **Record this conference** - Select this option to record the conference. If **Record this conference** is enabled, the maximum participant limit is 249. If **Record this conference** is not enabled, the maximum participant limit is 250.
   - **Turn on enter/exit sound** -Select this option to turn on or off an audible sound when entering or exiting the conference.
   - **Validate Callers** - When you select a conference bridge, **Validate Callers** is selected by default.
     - By default, **Notification Contacts** is selected and verifies that the callers exist in your notification as contacts (including their corresponding phone numbers).
     - Alternatively, select **Contacts**, which verifies that all contacts can join the bridge as long as each contact's phone number exists in the organization. A cleared check box allows any caller to attend the conference.
   - **Do not include confirmation instructions** - This only applies to the text delivery path messages. This information is included in **Notification Details** so that you can determine your after-action analysis.
4. Send the incident.
5. From **Incidents** > **All Incidents**.
6. Select the name of your incident. The **Incident Details** appear.
7. Select **Conference Report** to open the Conference Report PDF.

Smart Conference Maximum Participant Limit

The maximum participant limit is regulated by sending the notification to only as many contacts as limited by the conference. This means if your Smart Conference notification is for 1,000 contacts, then only 250 (or 249 if the recording option is enabled) contacts will receive the notification. The remaining 750 contacts will not receive the notification at all.

If a Smart Conference has the maximum allowed number of participants connected already, and a new caller calls in directly to the bridge, then that caller will not be able to join the conference and will be disconnected shortly after the call is answered.

Reviewing the Status of a Conference Bridge Call

You can review the status of a conference bridge call in **Incident Details**. The **Conference Call** column shows four statuses for a Conference Bridge call.

- **Ready** - The conference call is ready to start but has not started yet.
- **Live** - If you click **Live,** the active Smart Conference status page appears. See Conference Bridge Call is Live.
- **Over** - if you click **Over**, the end Smart Conference status page appears.
- **Expired** - The conference call has expired.

You can click the recording button to replay the conference call, or click the **Title** of the Conference to see the **Notification Details**.

Conference Bridge Call is Live

If the **End date/time** shows **Active** on **Notification Details**, at least two contacts have joined the conference call, and the conference is in session. Otherwise, the **End date/time** is shown.

From **Incident Details**, click **Live** in **Conference Call.** A window displays the live status.

- You can see who is talking in the upper left-hand corner of the screen, under the time lapse.
- You can see the status of the callers, the groups they included in the notification, when they joined and/or departed the call, with **Conference Speaker** (green icon)/**Mute** (red icon) buttons and **Kick** (as in kick out) buttons.
- If **Validate Callers** is **Yes**, this means the callers are verified that they exist in your contact data (including the phone number to be used in Smart Conference calls). If **Validate Callers** is **No**, it allows any callers to attend.
- If **Recording** is **Yes**, it means the conference is recording. When the conference ends, the recording can be played back or downloaded. (The maximum storage is 3 months.) When recording, the maximum number of callers is 254. 255 when the recording option is not used.
- You can click **Mute Controls** to mute or unmute all or selected contacts. If you select all callers, all participants (including the speakers) are muted. Remember to unmute any speakers.
- Other notes:
    - To leave the call, hang up.

> **NOTE:** Only click **End** to end the conference call.

> **CAUTION:** When recording is enabled, the conference absolutely ends after four hours from the start time. While you can continue the call, the recording will stop at the four-hour mark.

- To update an online caller, see the procedure To update a caller in Live or Over status, below.
- Or, if everyone hangs up, the conference call ends.
- The **Estimated End Time** shows a date and time. The system calculates the end time on the last person's join time plus four hours.
- Each caller can be on the call for four hours. After four hours, the caller is disconnected. If the conference call is on-going, call in again.

Updating a Caller in Live or Over status

To do this:

1. Click the **Pencil** icon of the caller you want to update. The **Update Caller** dialog is displayed.
2. From the **New Value** field, type the replacement value and click **Update**.
3. Hover your mouse over the dotted line to see the updates made for this caller.

Smart Conference is Over

You can see the **Over** status in one of the following ways:

- Click **Over** in the **Conference Call** column from the **Incident Details** page.
- Click **Over** from the **Notification Details** page. **Over** means the conference has ended. Either the **End** button was clicked to end the call, the **Stop** button was clicked on the **Incident Details** page, or all callers hung up.

Once the recording has finished, you can play it and/or download it. The **Over** status page displays the **Replay** icon and has a download link. The recording is available for 120 days.

- To hear the conference call, click **Replay**, then, from the **Smart Conference Recording** dialog, click **Play**.
- Click **Conference Report** to download a PDF of the call. The Conference Report only displays when the conference has ended.

Smart Conference has Expired

When the Smart Conference call has expired, the conference will not start. That is, the related notifications have all expired or some of the related notifications are stopped.

When you click the **Title** from the **Incident Details** page, the **Notification Details** page is displayed. The Conference Bridge details shows **Expired**.

Configuring Scenarios

You can notify different audiences with different messages at the same time. Using scenarios, you can link variables into one operator page that then separates into different template messages to send to different contacts, so you do not need to locate and send each Incident template individually.

If you have been given permission, you can do the following with scenarios:

- Launch and manage scenarios
- Use launch-by-phone functionality for scenarios
- Create, edit, and delete scenarios (administrators only)

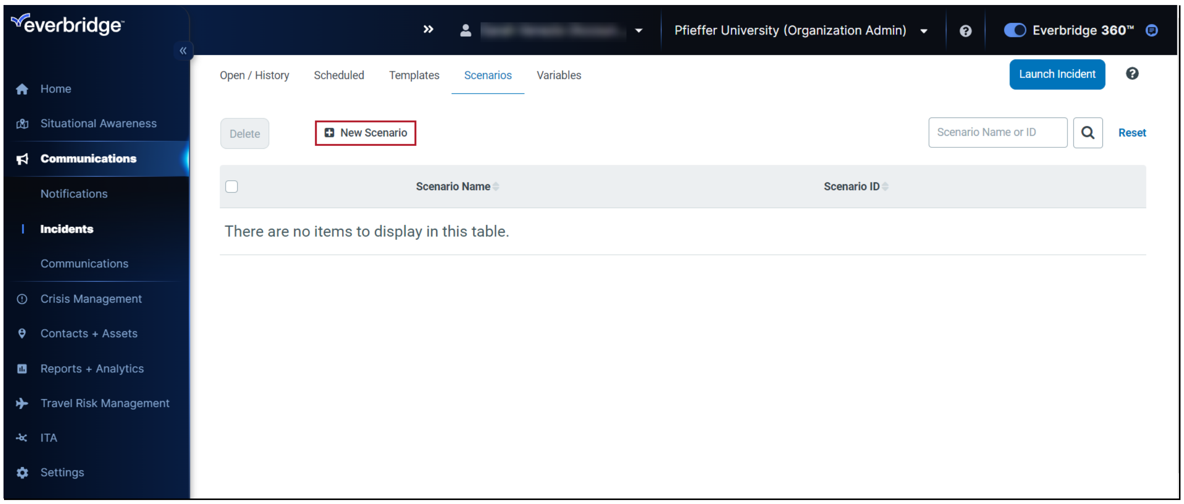
Scenario permissions and Incident template permissions are not the same. Assigning a scenario to a role does not automatically assign the individual template to the role.

You can add up to 40 templates - both **Live** and **Draft** - per scenario. See your Everbridge representative if your Organization needs to have this number increased.

Adding Scenarios

To add a scenario:

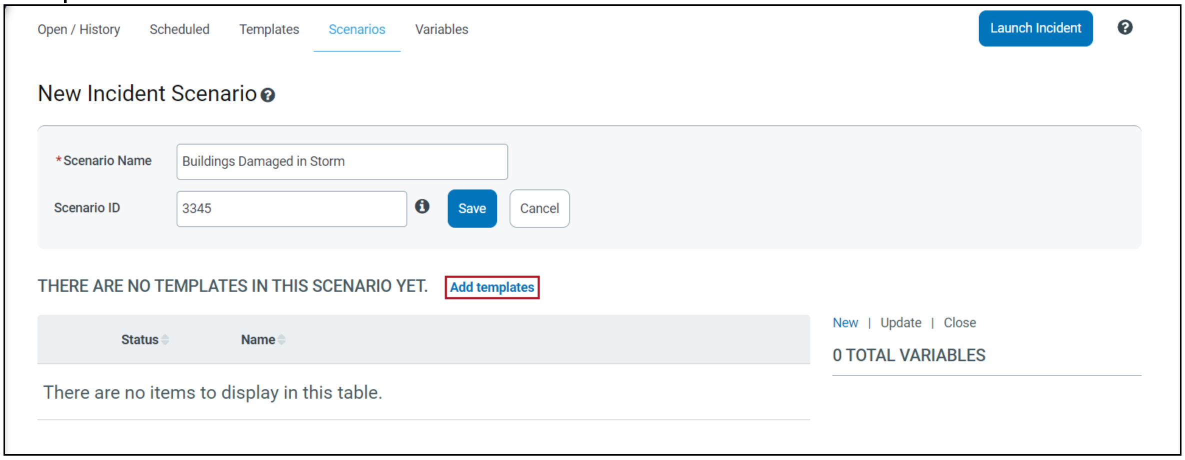
1. Ensure you have all your Incident templates created.
2. Select **Incidents** > **Scenarios**.
3. Click **New Scenario**.



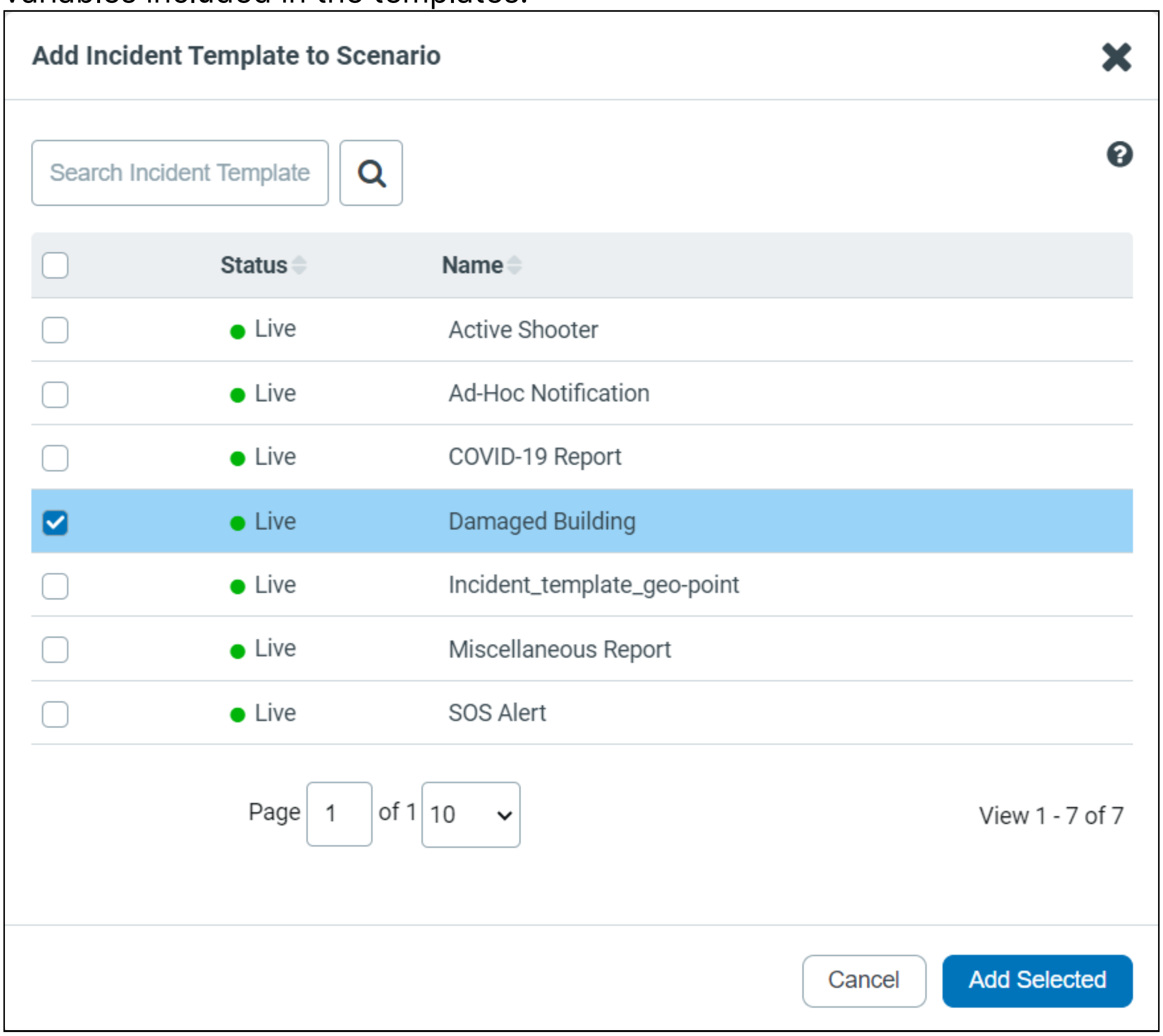
> **TIP:** If you do not want to create a new scenario from scratch, you can click **Copy** to copy an existing scenario.

4. The **New Incident Scenario** page is displayed. In **Scenario Name**, type a unique name.
5. If you are using launch by phone, in **Scenario ID**, enter a numeric ID. The ID can be up to 20 characters, but cannot start with 0 (zero). (This allows you to launch your Notification by phone when you have no access to the Internet or WiFi.)
6. To add templates to your scenario, select **Add Templates**. The **Add Incident Template to Scenario** dialog displays all your Organization's Incident

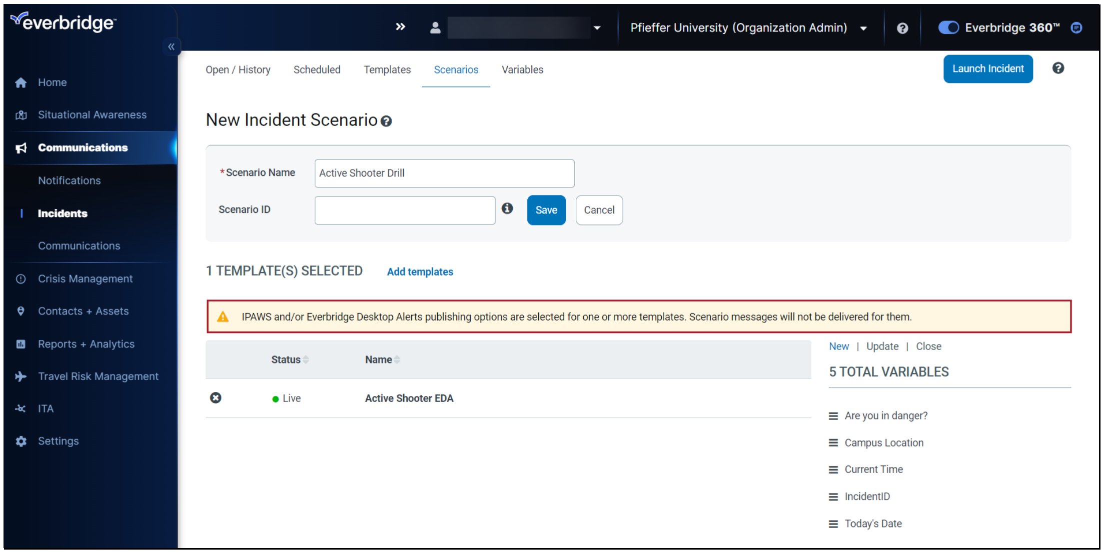
templates.



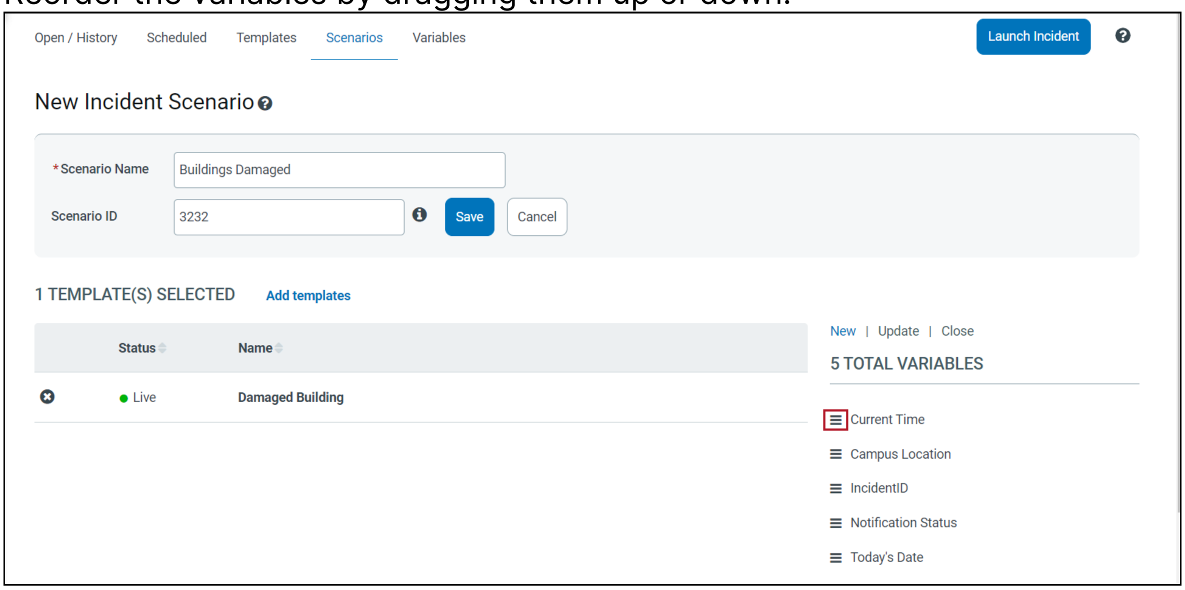
7. Optionally, search for the Incident template name you need.
8. Select the Incident templates to be included in this scenario, then click **Add Selected**. The selected templates are listed as well as the information variables included in the templates.



- **NOTE**: By default, Incident Scenarios do not support desktop publishing. If a selected Incident Template contains **Everbridge Desktop Alerts** as a publishing option, the Scenario message will not be sent, and the user will see the below error:



9. Reorder the variables by dragging them up or down.



10. Click **Save**.

Editing Scenarios

To edit scenarios:

1. Select **Incidents** > **Scenarios** and select the **Pencil** icon next to the scenario you want to edit. The **Edit Incident Scenario** page is displayed.
2. Optionally, in **Scenario Name**, type a new name.
3. Optionally, in **Scenario ID**, type a new ID.
4. Remove an Incident template from the scenario by clicking **Close**. This action only removes the template from the scenario. It does not delete the template.
5. Reorder the variables by dragging them up or down.
6. Click **Add Templates** to select and add more templates. Your changes are reflected on the **Edit Incident Scenario** page.
7. Click **Save**.

Deleting Scenarios

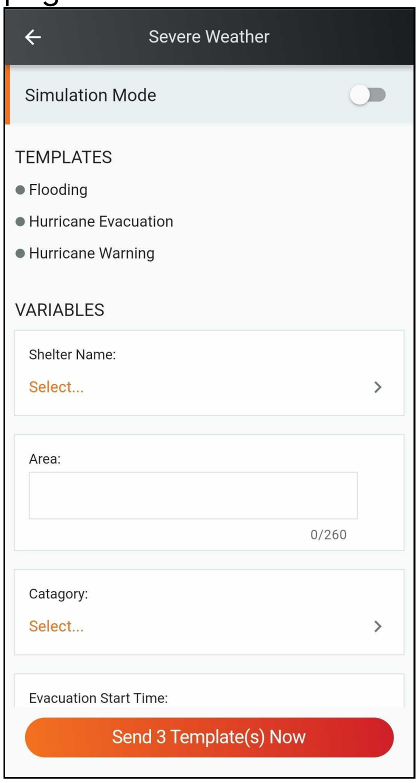
If you no longer want a scenario to be available for use once you have removed user access to that scenario and once opened Incidents in your scenario are closed, you can delete a scenario.

1. Select **Incidents** > **Scenarios**.
2. You delete a scenario by selecting the scenario and selecting **Delete**. You can select more than one scenario at a time.
3. To delete all scenarios, select the check box in the column heading and select **Delete**.

Launching a Scenario from ManageBridge

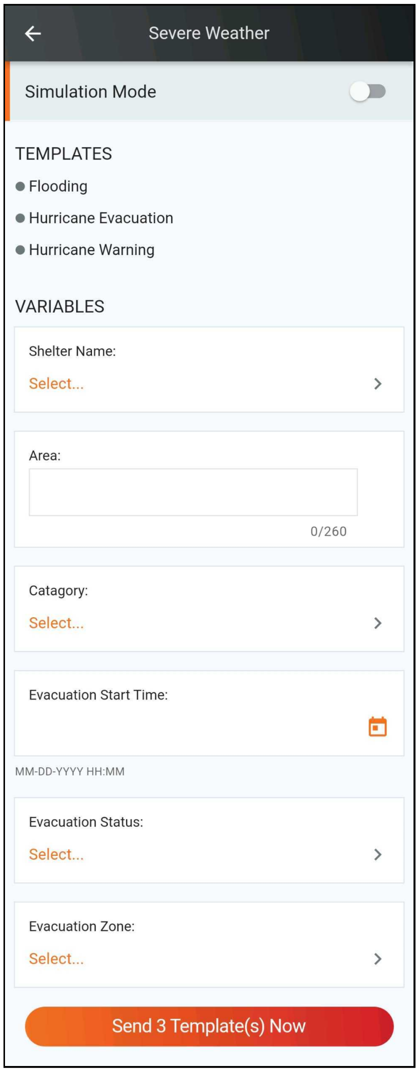
To launch a Scenario:

1. Tap on a Scenario from the list to prepend its details to the form on the next page.



2. Specify if this Scenario should be launched in **Simulation Mode**.
3. Review the preselected templates for this Scenario under the **Templates** heading.

4. Fill in the inherited variables for the Scenario. The example below is for a Severe Weather Scenario that calls for local evacuations.

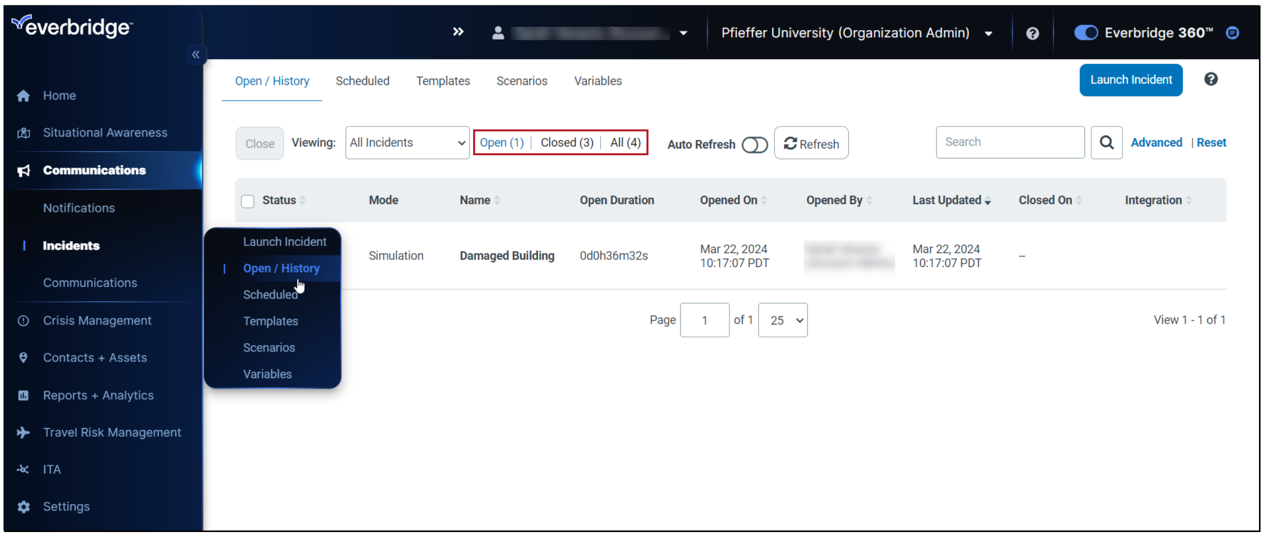


5. Tap **Send**.

Managing Incidents

By navigating to **Communications** > **Incidents** > **Open/History**, you can view all your Incidents, regardless of their status. This enables you to quickly and easily view the current status of all your Incidents. You can also filter your Incidents, where (*n*) is the number of Incidents in a filter.

- **Open (*n*)** - total number of open Incidents
- **Closed (*n*)** - total number of closed Incidents
- **All (*n*)** - total number of both open and closed Incidents



Using **Advanced Search**, you can search for Incidents, for example, that were updated on a certain or by a certain user.

You can also perform actions, such as sending Incident updates or closing Incidents. By default, all Incidents are displayed but you can choose to view either individual Incidents, or scenarios.

The **Open/History** tab displays the following information:

Field or Area	Description
Search	Use a string to search the **Incident Name** column. The search feature uses the **contains** condition. For example, to find all Incidents with the name **Office**, type the full word or the partial word, "Office" or "off". When you click **Search**, the application searches all Incidents whose names contain "Office" or "off".
Advanced Search	You can combine multiple conditions to search Incidents.
Reset	To clear the **Search** box, click **Reset**.

Status	Indicates the Incident status, either **Open** or **Closed**.
Actions	If the status of the Notification is **Open**, an **Actions** drop-down list offers the actions that you can perform. • **Send update**. See Sending an Update Notification. • **Close - send Notification**. See Closing an Incident. • **Close - without a Notification**. See Closing an Incident. The **Send update** and **Close Incident** actions are also available from the **Incident Details** page.
SM	**SM** is an acronym for Scenario Manager, which indicates this is an Incident scenario.
Name	The name of the Incident. You can edit the name of your Incident. 1. Click the **Pencil** icon next to the Incident name. 2. Change the Incident name to something that your administrators and you will be able to quickly find later. 3. Click **Save** to save the new name or **Cancel** to exit the text box without saving your changes. Changing the Incident name changes the time stamp and user name in the **Last Update** fields.
Open Duration	This column indicates the length of time the Incident was open for closed Incidents, or the length of time since the Incident was opened for open Incidents. In format *days-hours-minutes-seconds* (*NN*d*NN*h*NN*m*NN*s where *NN* represents the number).
Opened On	Displays the time stamp when the first Notification was sent.
Last Updated	Displays the time stamp when the Incident was last updated.
Closed On	Displays the time stamp when the Incident was closed. Otherwise, **--** indicates the Incident has not yet been closed.
Integration	This column shows the name of the email ingestion. When Incidents are launched through email ingestion, the name of the email integration that resulted in the Incident displays in this column.

You can change the sort order of the table by clicking on the column headings.

Confirming Message Receipt on Behalf of Recipients

When launching an Incident, you can request that your contacts confirm that they have received the message. This also stops any further attempts to reach them with a Notification.

If you select **Yes**, and your recipients do not confirm (maybe they accidentally deleted the Notification) within 5 days of the Notification launch, you can confirm on the contacts' behalf. If you do not confirm on their behalf, after 5 days of the Notification launch, you see **The allowed time period for operator confirmation is expired**.

To confirm message receipt on behalf of recipients:

1. From the **Incident Details** of the Notification, click the name of the Notification.
2. Click **Operator Confirmation**.
3. Select the names to confirm on behalf of the contacts, then click **Update Confirmation for Contacts**.
4. A **Confirm for Contacts** dialog is displayed. Click **Confirm Contacts**. The contacts you have confirmed are no longer displayed on the SELECT AND CONFIRM FOR CONTACTS LIST. Instead, you will see their names on the **Delivery Details**, where the **Confirmed** column displays **Y**.

Adding an Incident Journal Entry

An Incident journal allows you to record notes about the Incident that are not sent with the Notification. You might want to record the reason for sending the Notification, peripheral information about the Incident, management of the Incident, or any communication issues or communication with external parties such as utilities, vendors, or regulators.

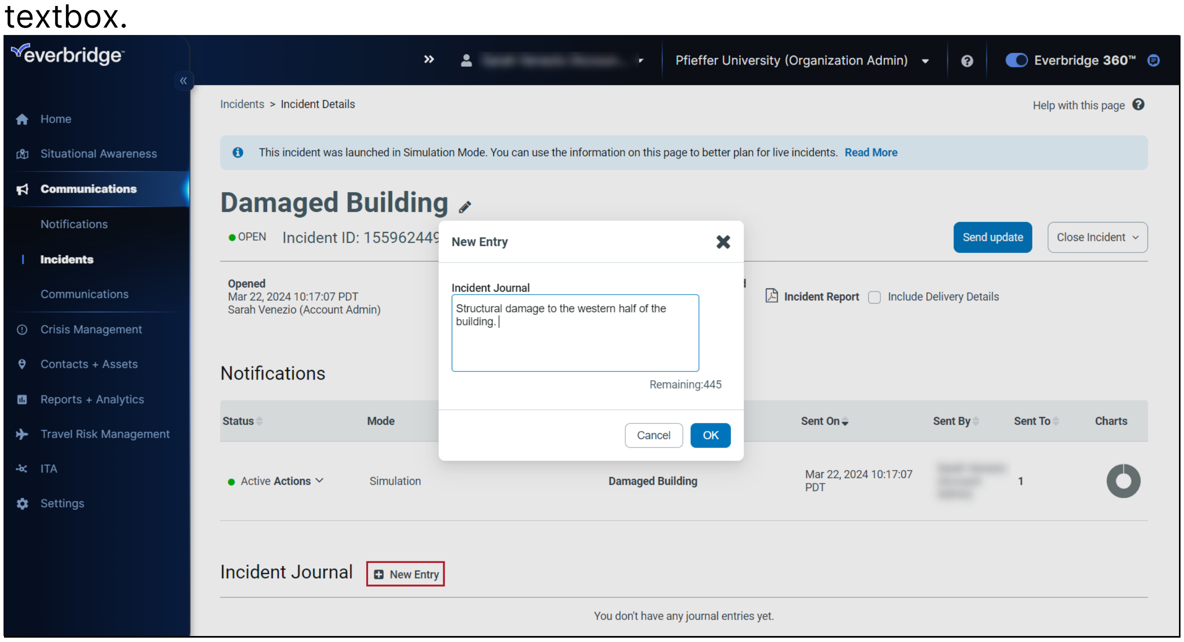
You can post any number of journal entries, even when the Incident is closed. You could post follow-up information denoting, for example, conversations, that are then documented on the Incident Report, where the entire life cycle is recorded. (All Incident information is recorded up to the instant the Incident Report link is selected.)

Journal entries are displayed in:

- **Incident Details** (in reverse chronological order)
- **Incident Report** (in chronological order).

To add an Incident Journal entry:

1. Select **Incidents** > **Open / History**.
2. Select the Incident whose details you want to view.
3. From **Incident Details**, click **New Entry** and type your journal entry in the textbox.



4. Click **OK**.

Sending an Incident Update

Some situations do not resolve immediately and require more communication than a single initial message. You can send additional messages for any open Incident by sending an update Notification. An update Notification sends another Incident Notification to the contacts with content modified to reflect the changing situation. Depending on how your Incident Administrator has set up your template, the update may have new variables included for the new circumstances.

For example, updates for a severe weather event might include:

- An escalation of the intensity of the storm or the storm category increases
- An evacuation order being called
- Current information on shelter status

The Incident you just opened is located at the top of the **All Incidents** table. While the Incident is **Open**, you can send update messages.

To send an update Notification:

1. Select **Incidents** > **Open/History**.
2. Find the desired Incident.
3. Click **Actions > Send Update**.
4. The **Update Incident** dialog appears. The form is prefilled with the previous Notification's title and fields.
5. Toggle **Exercise mode** if this Incident is a drill. The word DRILL is prepended to the message title and message text. (Also, when **Exercise mode** is on, you can only use **Test** mode for IPAWS. **Live** mode is disabled.)
6. Select either:
    - **Template Setup** to use the values from the template setup. The selection overwrites any change you have made on the form.
    - **Previous Notification** to use the values of the matching form variables as used in the previous Notification of the Incident.
7. If required, edit the fields in the Operator Form.
8. Click **Next**. If you have not made any changes to any values in the form. you are prompted to confirm that you want to proceed to the next page.
9. If required, edit the Message.
10. If your Incident Administrator has opted to create an additional Incident Notification review step to your Notifications, you can select **Review and Send** to preview and review your Incident.
11. Click **Send** to broadcast the update message. After you click **Send**, the **Incident Details** page appears. (For details, see Reviewing an Incident.) You can send as many updates as you need.

Stopping an Update Notification

You can stop an active Notification in case the Notification has changed, has been resolved, or you made a mistake. To do so:

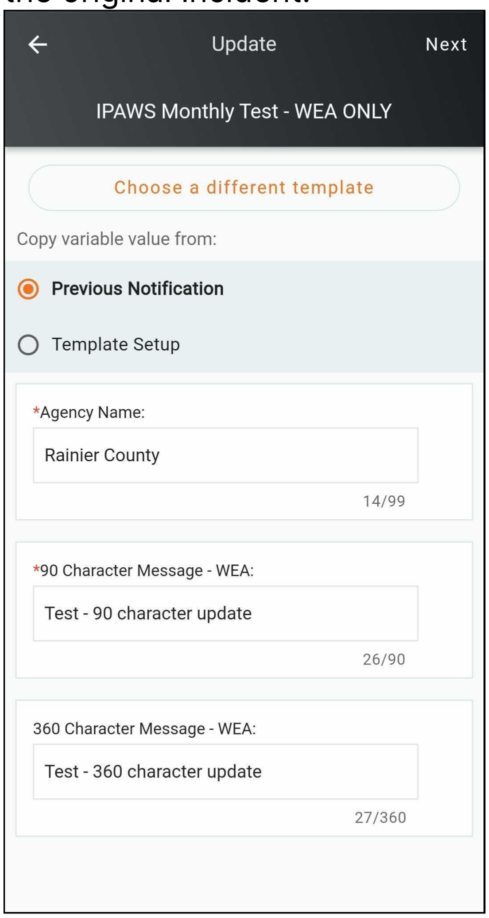
1. Select **Incidents** > **Open/History**.
2. Select the Incident name whose Notification you want to stop. The **Incident Details** page is displayed.
3. Select **Actions** > **Stop**.
4. Click **Yes** to stop the Notification. Stopping a Notification does not affect messages that have already been sent, but stops the system from sending more messages. The status changes from **Active** to **Stopped**.

Sending an Incident Update Notification in ManageBridge

Recently opened Incidents are located at the top of the **Incidents** tab. While an Incident is active (Open), you can send update messages.

To send update messages via ManageBridge:

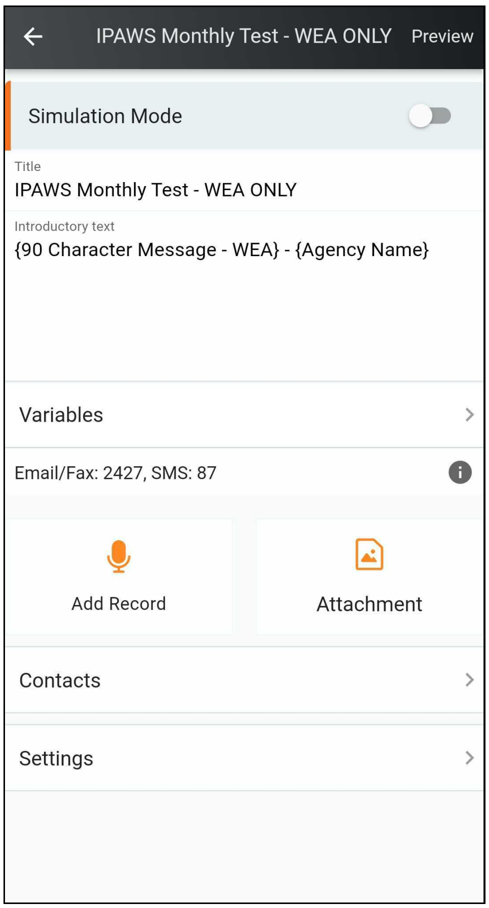
1. From **Incidents,** tap on the name of the Incident in question.
2. Tap **Send Update**. The **Update Incident** screen appears. If needed, you can select a different Incident Template for the follow-up than what was used for the original Incident.



3. Under **Copy variable value from...** select either **Previous Notification** to retain the information entered in these variable fields from the original Incident, or choose **Template Setup** to clear them entirely.
4. Change the value of any fields as needed.
    - You can fill in the fields in any order.
    - Editable fields are white. The values in the gray fields cannot be changed.
    - Required fields are indicated with *.

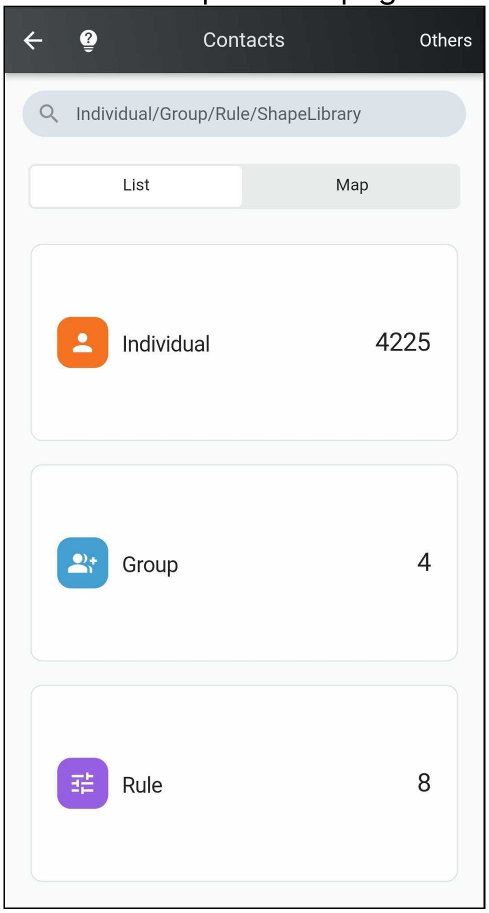
- There might be spinner lists offering solutions from which you select a value. The values and their order are defined by your administrators. Select the desired value and tap **Confirm**.

5. After you have finished configuring your information variables, tap **Next**. Here, you can:
   - Enable Simulation Mode.
   - Edit the Title and Introductory Text.
   - Double-check the variables.
   - Review the remaining available character count.
   - Add a voice recording.
   - Add an attachment.

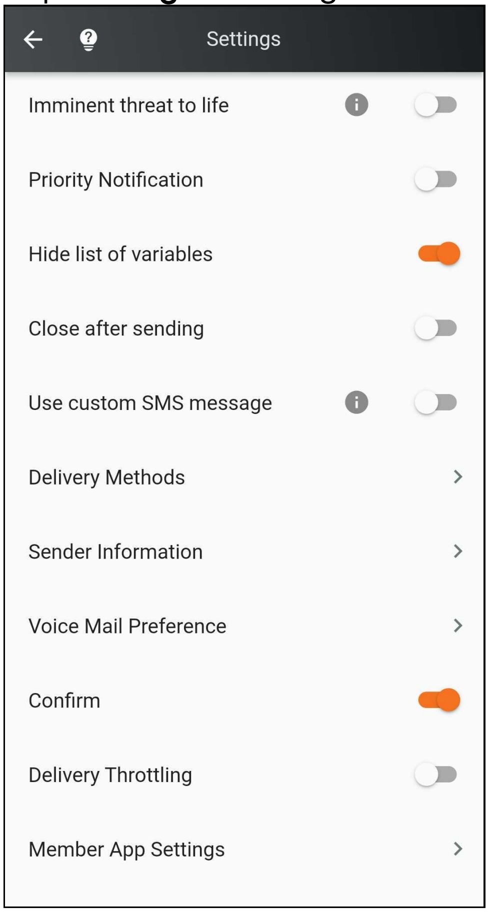


6. Tap **Contacts** to specify who should receive the follow-up by Individuals, Groups, Rules, or the Map. Once they've been chosen, tap the back arrow to

return to the previous page.



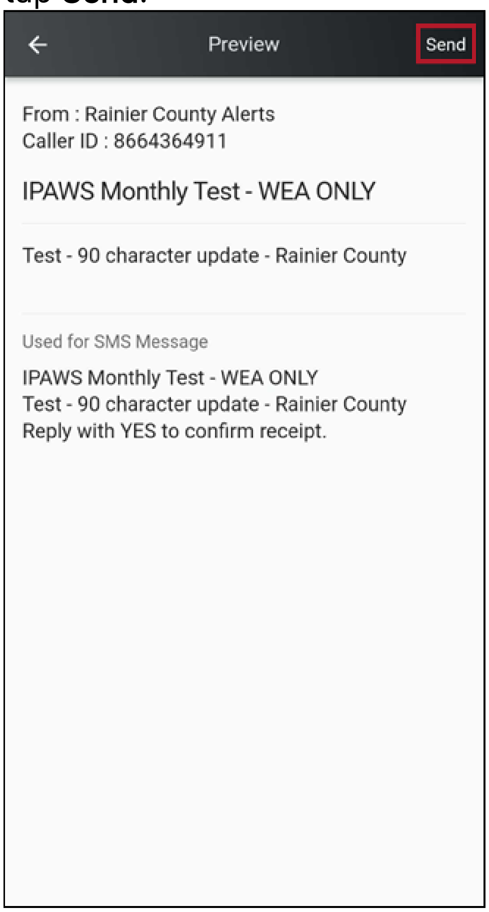
7. Tap **Settings** to configure the following preferences:



- Imminent threat to life (Yes/No)
- Priority Notification (Yes/No)
- Hide list of variables (Yes/No)
- Close after sending (Yes/No)
- Use custom SMS message (Yes/No)
- Delivery Methods
    - All Contact Paths
    - Text Paths
    - Voice Paths
    - Everbridge Mobile App
    - Primary SMS
    - Primary Email
    - Primary Mobile Phone
- Sender Information
    - Sender Email
    - Sender Caller ID
- Voice Mail Preference
    - Message Only
    - No Message
    - Message with Confirmation

- Confirm (Yes/No)
- Delivery Throttling (Yes/No)
- Member App Settings
    - Request Location (Yes/No)
    - Request Image (Yes/No)
    - Request Additional Info (Yes/No)
    - Enable Sharing Options (Yes/No)
- Additional Notification Settings
    - Language
    - Duration
    - Contact Cycles
    - Cycle Interval
    - Path Interval

8. Review the information from the Incident.
9. Tap **Back** at any time to return to the previous screen when you need to modify any information variables.
10. Tap **Preview** to review the details of the follow-up message. Once satisfied, tap **Send**.



Closing an Incident

Once a situation or crisis is over, the Incident needs to be closed. You can send a final Notification to close the Incident. You can also close an Incident with an update Notification.

To close an Incident from the Manager Portal:

- **Close - send Notification**. This allows you to send one final Notification to the contacts. This may be information about how the situation was resolved, an all-clear, or more generalized closure.
- **Close - without a Notification**. If you select this, you are prompted to confirm that you want to close this Incident without sending a Notification. If you select **Yes**, the Incident is immediately closed without any further contact from the Organization to the contacts. You can also do this by selecting the Incidents and clicking **Close**.

To close an Incident by sending a final Notification:

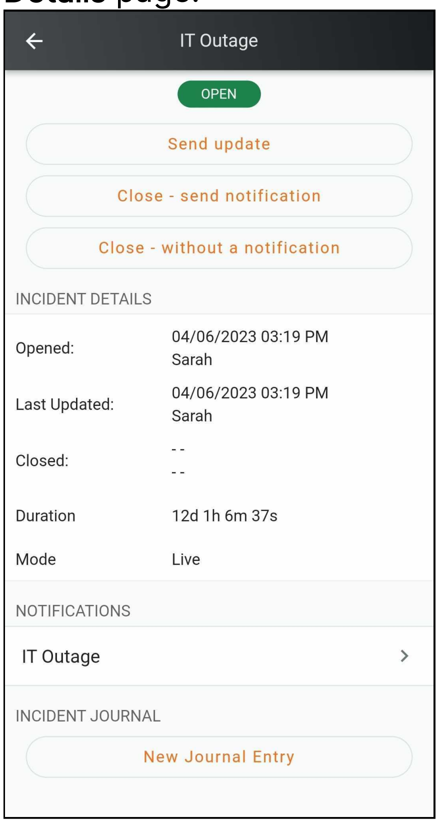
1. Select **Incident** > **Open/History**.
2. Find the desired Incident to close.
3. Select **Actions** > **Close - Send Notification**.
4. Click **Confirm** to confirm that you want to close this Incident. The **Close Incident** is displayed. The form is prefilled with the previous Notification’s title and fields.
5. Change the value of any field, as needed. If you have not made any changes to any values in the form. you are prompted to confirm that you want to proceed to the next page.
6. Click **Next**. The **Incident Message** is displayed.
7. Click **Send**. **Incident Details** shows the last Notification at the top of the table. In both **Incident Details** and **All Incidents** the Incident status is **Closed**.

Closing an Incident in ManageBridge

There are two ways to close an Incident in ManageBridge: Closing with or without a Notification.

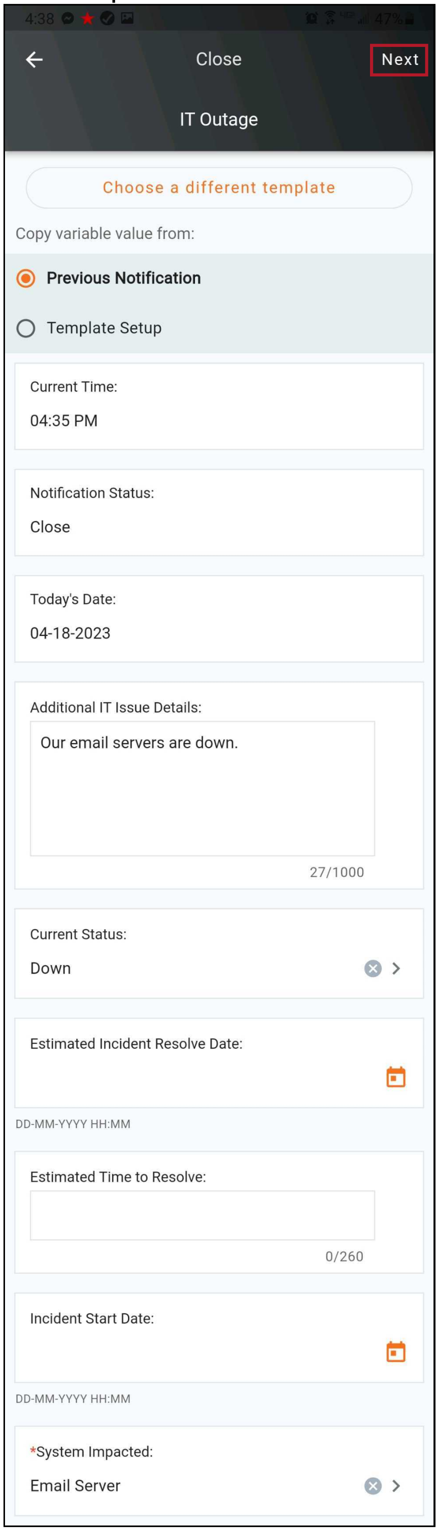
Closing With a Notification

1. Tap on the desired Incident from the **Incidents** tab. You'll land on the **Incident Details** page.



2. Tap **Close - send notification.** The **Close Incident** screen is displayed, where you can choose to import variables from either the Previous Notification or from the Template Setup. You can also use a different Incident template entirely as needed.

3. Fill out the status, time frames, and other data points included on this page, then tap **Next**.



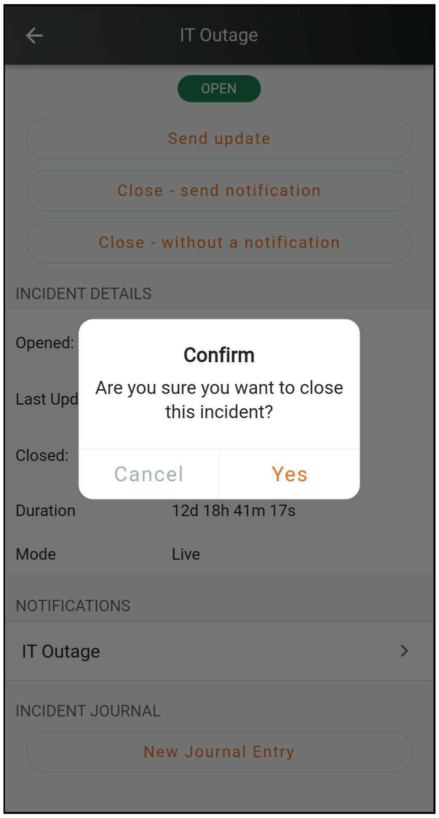
4. On the next page, you can:
   - Enable Simulation Mode
   - Review used variables

- Add a voice recording
- Add an attachment

5. Tap **Contacts** to review the Notification's recipients.
6. Review other crucial configurations by tapping on **Settings**. Here you can specify:
    - Exercise Mode (Yes/No)
    - Imminent threat to life (Yes/No)
    - Priority Notification (Yes/No)
    - Hide list of variables (Yes/No)
    - Use Custom SMS Message (Yes/No)
    - Delivery methods
        - All Contact Paths
        - Text Paths
        - Voice Paths
        - Primary SMS
        - Primary Email
        - Primary Mobile
        - Everbridge Mobile App
    - Sender Information
        - Sender Email
        - Sender Caller ID
    - Voicemail Preference
        - Message Only
        - No Message
        - Message with Confirmation
    - Confirm (Yes/No)
    - Delivery Throttling (Yes/No)
    - Member App Settings
        - Request Location (Yes/No)
        - Request Image (Yes/No)
        - Request Additional Info (Yes/No)
        - Enable Sharing Options (Yes/No)
    - Additional Settings
        - Language
        - Duration
        - Contact Cycles
        - Cycle Interval
        - Path Interval
7. Once finished, tap **Preview** to review the Notification. When satisfied, tap **Send**.

Closing Without a Notification

To close an Incident without sending a Notification, simply tap **Close - without a Notification**. A confirmation message will appear. Tap **Yes**, and the Incident will be closed without any further communication.



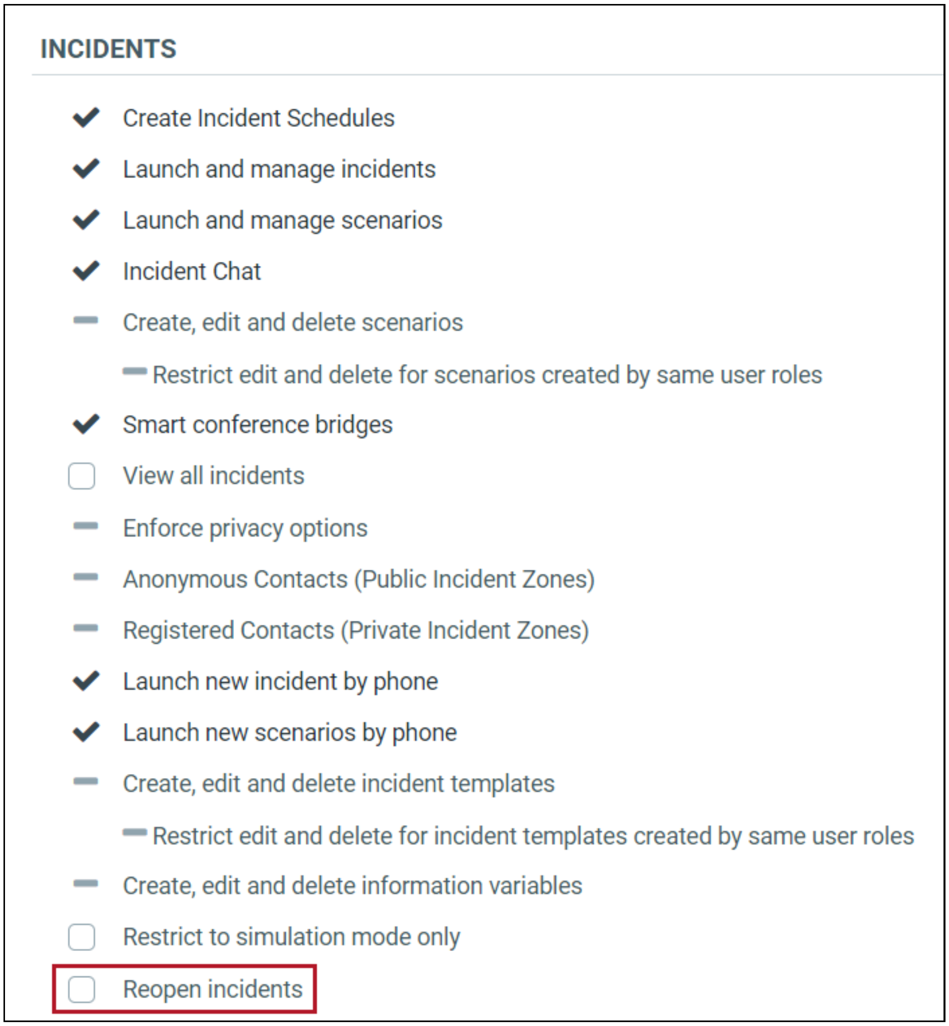
Reopening an Incident

Incident Operators, Incident Administrators, and Organization Administrators all have the ability to reopen a closed Incident for up to 90 days post-closure from either the **Open/History** page or the **Incident Details** page.

> **NOTE:** Incidents can be closed or reopened multiple times (based on the Closed Date), including those created in Simulation Mode.

Permissions

Before any of the aforementioned roles can reopen an Incident, they first need to be granted permission by an Account Administrator. This can be done at the Account level under **Roles** > **Permissions**.

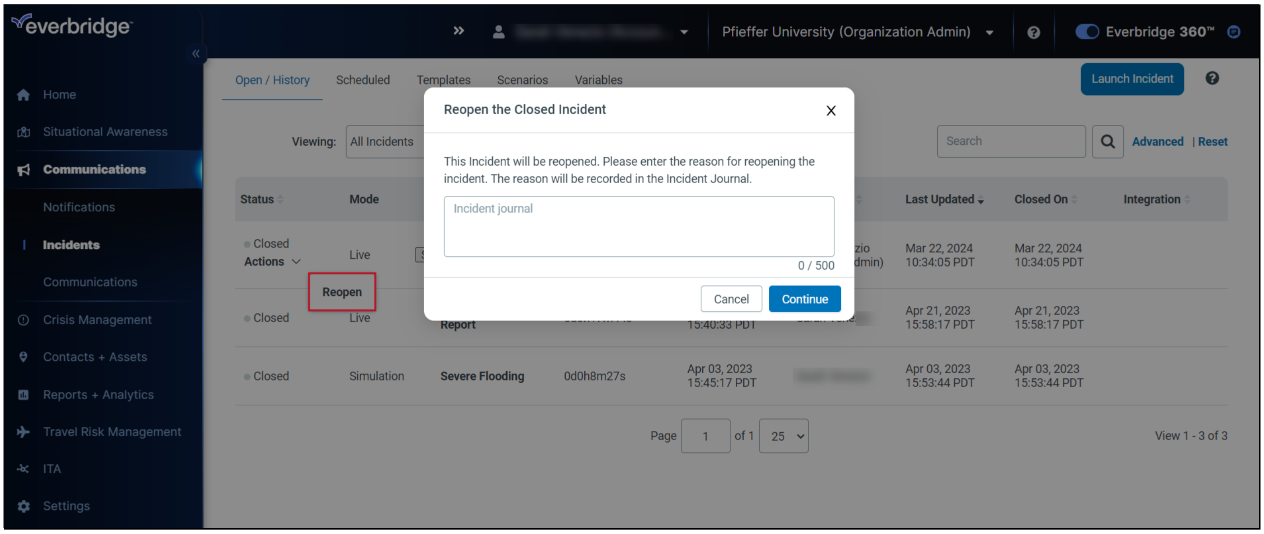


Once the **Reopen Incidents** checkbox has been selected, click **Save** at the bottom of the page.

Reopening from the Open/History Page

The first way to reopen an Incident is from the Open/History page under the Incidents tab.

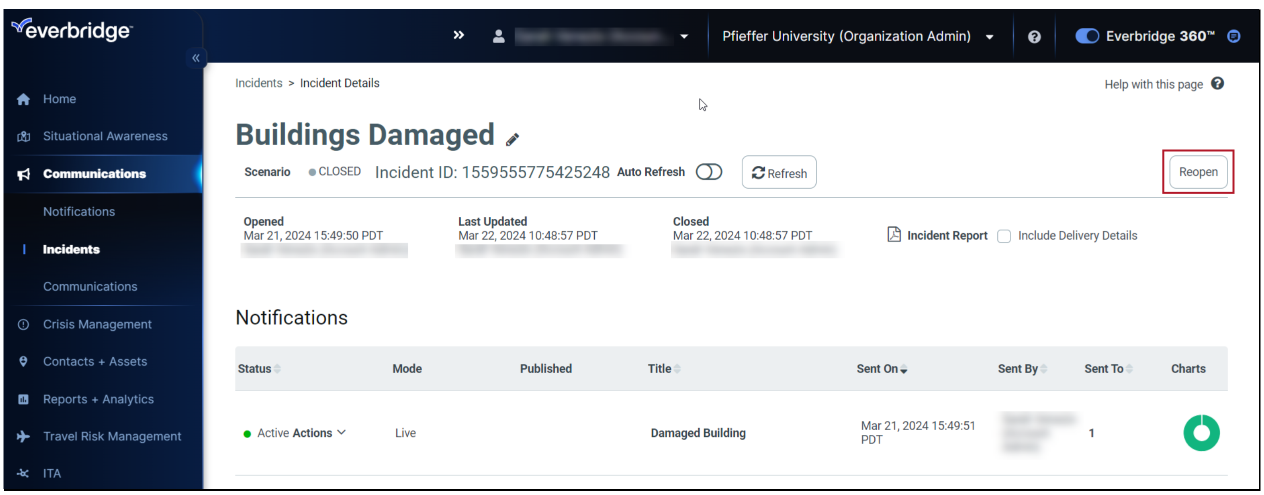
1. Click **Actions** under the **Closed** status of the Incident you want to reopen, and then **Reopen**.
2. A popup modal will appear prompting you to add a reason for reopening the Incident, which will be logged in the associated Incident Journal.
3. Click **Continue**.



The page will refresh and route you to the Incident Details page, where you can send a follow-up message or close the Incident again.

Reopening from the Incident Details Page

Reopening from the Incident Details page can be done by clicking **Reopen** in the top-right corner.



Reviewing an Incident

The **Incident Details** page of an Incident is a communication history for the Incident, including all the Notifications that were sent as part of this Incident. For example, for an Incident, you can:

- download a PDF of an Incident Report for an Incident. See Viewing an Incident Report.
- download all the relevant information for an Incident, including HTML report, attachments, map area shapes files, images, voice files, delivery detail CSV files, and so forth.
- send a follow-up to a message. See Sending a Follow Up Notification.
- add an entry to your Incident journal. See Adding an Incident Journal Entry.

You can see the details of any Notification by clicking its title from the **Incident Details** page.

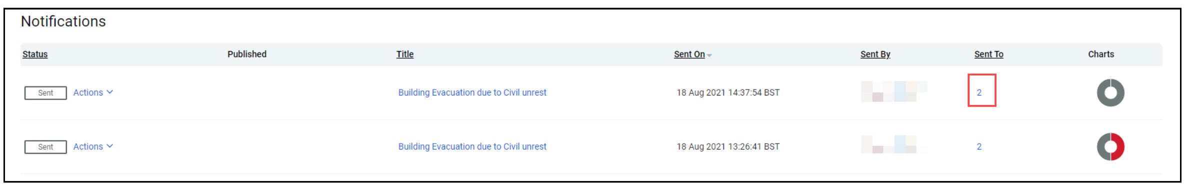
All Notifications are listed in reverse chronological order, sorted by the **Sent On** time stamp.

1. Select **Incidents** > **Open / History**.
2. Click the title of the desired Incident. The **Incident Details** are displayed.

Field	Description
Incident ID	This is the unique ID of the Incident. If you need to contact Everbridge about this Incident, you must provide this ID number.
Opened	Displays the time stamp of the first Notification, including the full name of the person who sent that first message.
Last Updated	Displays the time stamp of the last modification and the full name of the user who made that modification. Modifications include: sending subsequent Notifications, changing the name of the Incident, closing the Incident, and adding entries to the Incident Journal.
Closed	Displays the time stamp of when the Incident was closed and the full name of the user who closed the Incident.
Status	Shows the status for the Notification: • Active (green icon), • Stopped (X red icon) • Sent (check mark gray icon) An Up arrow indicates the Notification has escalations. This Up arrow replaces the **Actions** drop-down menu. (For information about escalations, see *Notification Escalations*.)

Published	Display a “P” indicating a Publishing Option has been used.
Title	The title of the Notification.
Sent On	Time stamp when the Notification was sent. Multiple Notifications are displayed in reverse chronological order.
Sent By	Full name of the message sender.
Sent To	The number of contacts selected for the Notification.
Charts	The pie chart shows the aggregated confirmation status (**confirmed**, **confirmed late**, **unreachable**, and **not confirmed**). You can print this pie chart, as well as download it as a PNG image, JPEG image, PDF document, or SVG vector image.

3. Click the **Pencil** icon to change the name of the Incident.
4. Click **Incident Report** to download a report for this Incident. This is useful if you want to review the outcome of the Incident with other stakeholders, collect feedback from all stakeholders, improve your Organization’s communication plan, and/or provide compliance information to regulators. You can also generate a report from **Reports**. See Custom Reports.
5. In **Sent To**, select a link to open a CSV (Comma-Separated Value) file in Microsoft Excel of those contacts.



6. If required, you can send an update (see Sending an Update Notification) or close this Incident (see Closing an Incident).
7. If required, send a follow-up to a message. See Sending a Follow Up Notification.
8. Select the **Title** of the message whose Notification details you want to view. The **Notifications Details** are displayed.
9. If you have Incident subscribers for this Incident then, in **Notification Details**, **Incident Subscribers** is **Yes**. When an Incident is set up to send to Incident Subscribers, your Notifications are sent to the Incident subscribers as well as to any contacts from the template.

   Notification Details displays any Incident escalations. Escalations are explained in *Notification Escalations*.

   Notification Details also displays details of an Incident using the Everbridge Desktop Alerts publishing option. You can manually deactivate the Incident or wait until the duration is met. You can only have one Desktop Alert per Incident. That is, if a newer Desktop Alert is sent, it automatically deactivates the previous alert.

Notification Details also displays scenarios. See Scenarios.

10. Click **Download** to get a compressed folder containing all relevant information (detailed HTML report, attachments, map area shapes files, images, voice file, delivery detail CSV file, and so forth) about the Notification. Everbridge Suite screens the data before downloading to your local system. If there is any suspicious content (for example, strings that start with = + - @ “ and when - or + are followed by a number) in any text field, then the CSV-formatted file is downloaded using a TXT file type during the download.
11. Click the **Chart** icon to see a detailed analysis of the Notification.
12. From **Sent to**, click the contacts link to download your contact records in a Comma-Separated Values (CSV) file. Everbridge Suite screens the data before downloading to your local system. If there is any suspicious content (for example, strings that start with = + - @ “ and when - or + are followed by a number) in any text field, then the CSV-formatted file will be downloaded using a TXT file type during the download.
13. From **Customized Email**, click **View** to see the actual email. Custom Emails are explained in Configuring Message.
14. Select **Status** to display a pie chart and the number of contacts confirmed, confirmed late, unreachable, and not confirmed.
15. Select **Method** to display a pie chart and the number of paths confirmed.
16. Select **Delivery Details** to display the contacts, confirmed paths, including the path value and time.
17. If used, select **Publishing Delivery** to show the publishing options used and their individual fields.
18. Select **Settings** to show the **Notification** settings. It also contains the contact groups, rules, and polygon names. See *Saving Notification Polygons* for instructions to save polygons from the **Notification Details** page to the Shape Library in the **Universe** tab.
19. Select **Incident Variables** to list of variables for this Incident.
20. Optionally, click Print to save a print version of the Notification details.
21. Select **Incidents** to return to the **Incidents** page (Incidents > Notification Details)

Reviewing Incident Details in ManageBridge App

After tapping **Send**, the **Incident Details** screen is displayed. This offers a communication history for a particular Incident.

1. Tap the desired Notification to see the **Incident Details**. The table describes the sections, from top to bottom, of the **Incident Details** screen.

Field Name or Area	Description
Incident Name	The Incident name appears in the title bar at the top of the screen just above the Status (OPEN or CLOSED) button. The Incident Name is copied from the title of the first Notification.
Status	An Incident is either OPEN (green background) or CLOSED (gray background).
Send Update Close - send Notification Close - without a Notification	Select one of these buttons to send an update or close the Incident. See: • Sending an Update Notification in ManageBridge • Closing an Incident in ManageBridge
Opened	Displays the time stamp of the first Notification, including the full name of the person who sent that first message.
Last Updated	Displays the time stamp of the last modification and the full name of the user who made that modification. Modifications include: sending subsequent Notifications, changing the name of the Incident, closing the Incident, and adding entries to the Incident Journal.
Closed	Displays the time stamp of when the Incident was closed and the full name of the user who closed the Incident.
Notifications	Under **Notifications**, all Notifications are listed in reverse chronological order, sorted by the **Sent On** time stamp.
Incident Journal	To record notes about the Incident that are not sent with the Notification. You might want to record the reason for sending the Notification, peripheral information about the Incident, management of the Incident, or any communication issues or communication with external parties such as utilities,

	vendors, or regulators. You can post any number of journal entries, even when the Incident is closed. You could post follow-up information denoting conversations or anything to ensure that it is documented on the Incident Report where the entire life cycle is recorded. (All Incident information is recorded up to the instant the Incident Report link is selected.) Journal entries are displayed on the Incident Details page in reverse chronological order. However, journal entries for an Incident are listed on the Incident Report in chronological order. 1. Tap **New Journal Entry**. The **New Journal Entry** screen appears. Type your journal entry in the text box (maximum 500 characters). 2. Tap **Save**. The journal entries are displayed in **Incident Details** and also individually when you tap an Incident journal entry name.

2. Tap the desired Notification to see the Incident details.
    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 have confirmed by delivery method.
    c. Tap **Notification Summary** to see the following details:
        - Notification ID
        - Message Title
        - Message Text
        - Initiated By
        - Start Date
        - End Date
        - Throttling (Yes/No)
        - Emergency (Yes/No)
        - Notification Mode
        - Imminent Threat to Life (Yes/No)
        - Sender Email
        - Sender Caller ID
        - Delivery Methods
        - Duration
        - Contact Cycles
        - Voicemail Preferences
        - Confirm (Yes/No)
    d. Tap **Back** to return to **Incident Details**.

Sending a Follow-Up Notification

You can send a follow-up Notification to contacts based on their responses (confirmed, not confirmed, unreachable, specific polling response). To send to the configured contacts, see Sending an Update Notification.

To send a Follow-Up Notification:

1. Select **Incidents** > **Open/History**.
2. Select the desired open Incident. The **Incident Details** page is displayed.
3. From **Actions**, select **Send Follow-Up**. The **Send Follow-Up** option is also available on the **Notification Details** page.
4. From the **Send Follow-Up** dialog, select each check box of the response category that you want to send a follow-up to.
5. Select **Preview and Edit** to view the contacts who will be sent the Follow Up Notification. You can also clear the check boxes of contacts who you do not want to include in your follow-up.
6. Click **Next**. The **Send Follow-Up Incident** page appears for you to select the desired template and enter the follow-up information. If the **Follow-Up/ Update/Close Include Previous Email Message** option has been enabled under Default Settings, then you can choose to include any Rich Text Format content from the previous message in its follow-up when applicable. If no RTF was used in the previous message, it will display the previous plain text content instead.
7. Complete your Follow Up Notification by referring to Sending an Update Notification .