Crisis Management User Guide

Everbridge Suite

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Introduction

The *Crisis Management User Guide* provides information about how to use the Crisis Management product. It introduces the key function points around planning, orchestration, and managing critical events.

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

Intended Audience

This guide is intended primarily for Incident Administrators, Incident Operators, and contacts of the Everbridge Suite system using the **Critical Events** tab.

Overview

Crisis Management (CM) is the cornerstone of the Everbridge Critical Event Management (CEM) System. It orchestrates all crisis response activities, teams, and resources to accelerate Critical Event recovery times and allows Organizations to continue to deliver on their brand promises with the least possible impact to life safety, revenue, and reputation.

> **NOTE:** Crisis Management has been designed for use with the updated user interface. This product requires Mass Notifications and Incident Communications to be functional.

Critical Event Management (CEM)

Critical Events happen every day: severe weather, workplace violence, active shooters, terrorism, IT and power outages, environmental discharges, critical equipment failures, medical emergencies, social media attacks. They threaten safety and brand reputation, interrupt supply chains, and disrupt operations.

Everbridge Critical Event Management provides a suite of Critical Event solutions for our customers to handle Critical Events at different stages:

- **Access the threats**
- **Locate employees**
- **Act on the plan**

- **Analyze the results**

Crisis Management (CM)

Crisis Management automates the key steps for responding to a Critical Event. It enables customers to act by executing predefined procedures based on the type of threat. It contains the task lists and communication controls. Task lists contain the SOPs (Standard Operating Procedures) with owner and related documentation needed for the action.

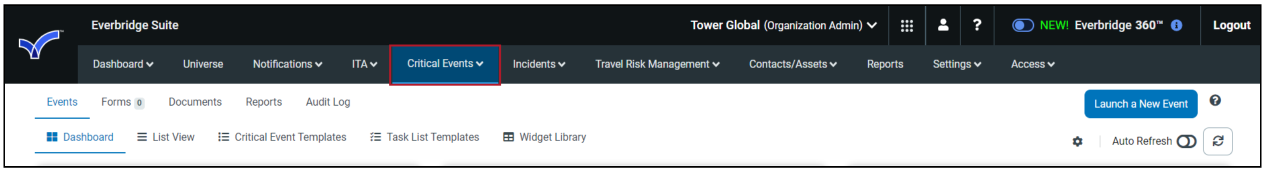
Crisis Communication includes who should be contacted and how, what message to send, and whom to escalate to if a responder is not available. Automating these steps enables the tasks to be completed quickly, highly reliably, and at scale at a time when minutes often matter.

The CM system allows you to check what each extended team is doing and their status. An extended team is typically comprised of a department head (who is also a part of the core Crisis Management team) who prepares the SOPs or plans, and task assignees or contacts are the resources who perform the tasks.

The CM system also enables you to plan and manage the incident Notifications from the Critical Events tab, so that these communications will be tied to the Critical Event and put into the audit log

Critical Events Tab

The **Critical Events** tab is the centralized hub for all of an Organization's Critical Event information.



To launch a new Critical Event, select **Launch New Event** in the top-right corner. For more on launching, refer to [Launch a Critical Event](#).

The Critical Events is broken down into several main sections and subsections:

- **Events**
  - Dashboard
  - List View
  - Critical Event Templates
  - Task List Templates
  - Widget Library
- **Forms**
  - Submissions
  - Form Library
- **Documents**
- **Reports**
- **Audit Log**

Events

The **Events** tab houses some of the most essential information about Critical Events, both on a holistic level and individual events.

Dashboard

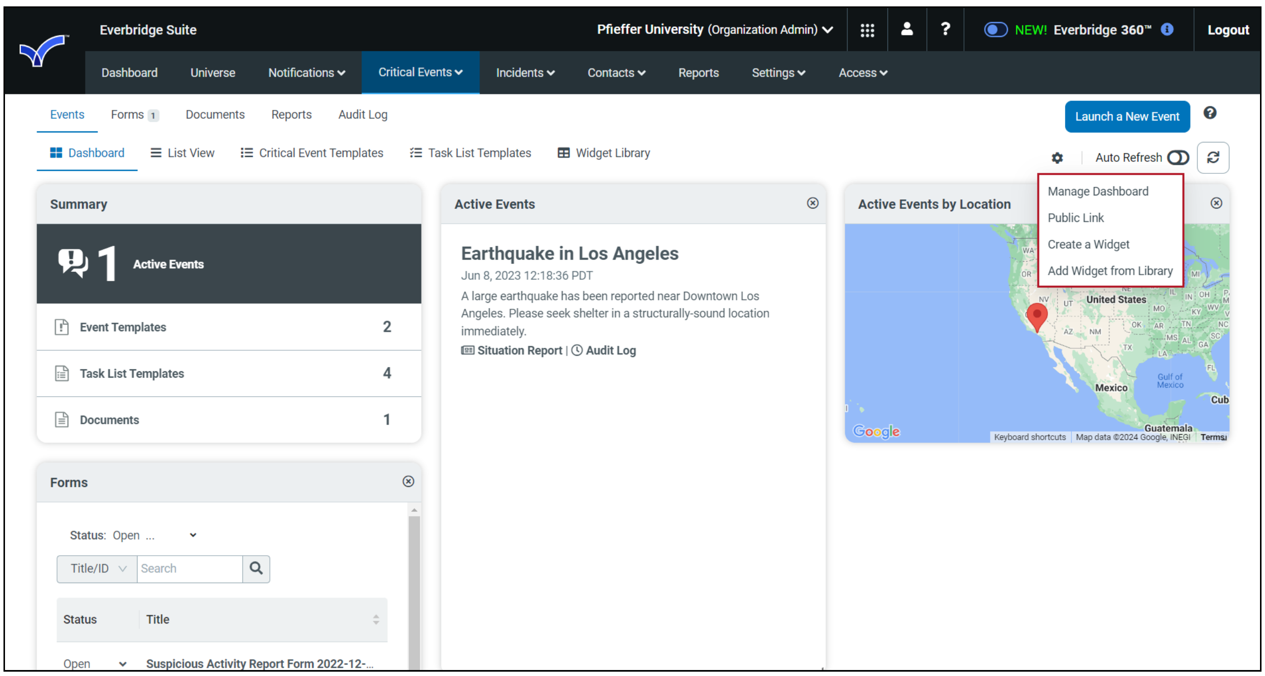
The **Events Dashboard** is the default landing page when clicking on the **Critical Events** tab from the menu bar. You can manage what appears on the Dashboard, including:

- Summary
- Active Events
- Active Events by Locations
- Requests

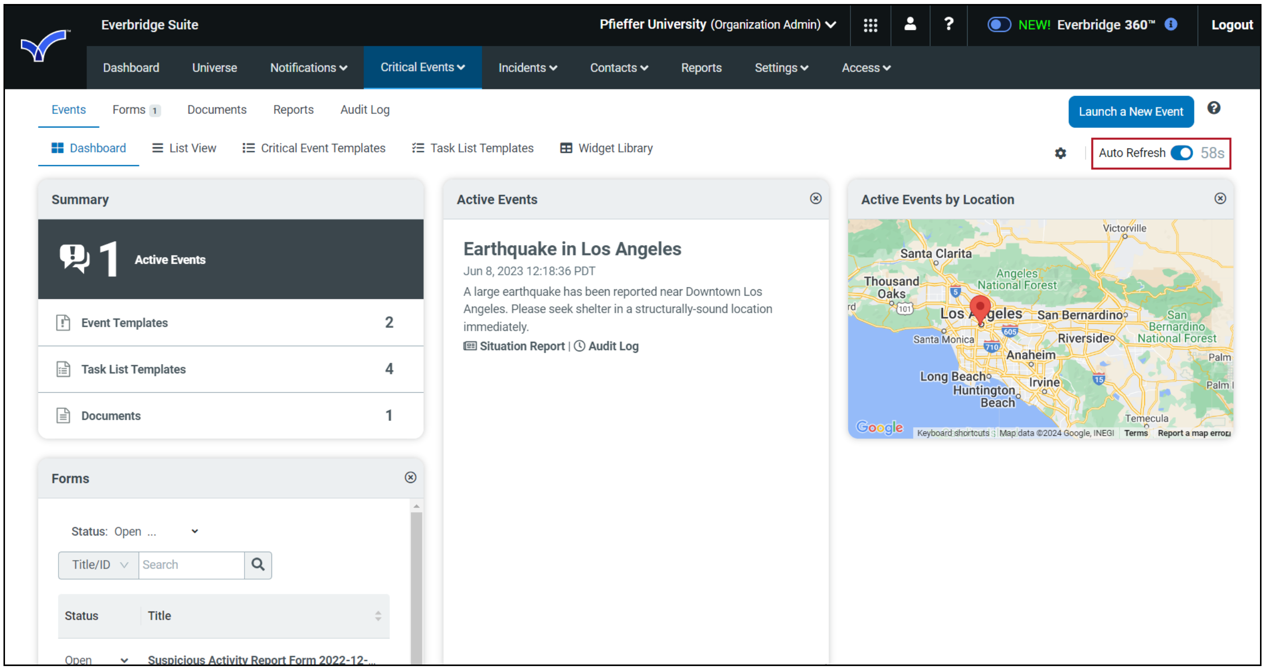
- Tasks Needing Attention
- Widgets

The following options can be performed by being selected from the Dashboard Actions cog icon:

- **Manage Dashboard** - Select the dashboard events to be displayed.
- **Public Link** - Generate a Public Link to send to specified email addresses.
- **Create a Widget** - Administrators can create Custom Text or Webpage widgets, which can be seen on all event dashboards across the Organization.
- **Add Widget from Library** - Add Custom Text or Webpage widgets from the Library to the Dashboard.



Additionally, you can refresh the **Critical Event Home** page by selecting **Auto Refresh**. The Auto Refresh occurs every 60 seconds. It stops when a user is working on the page.



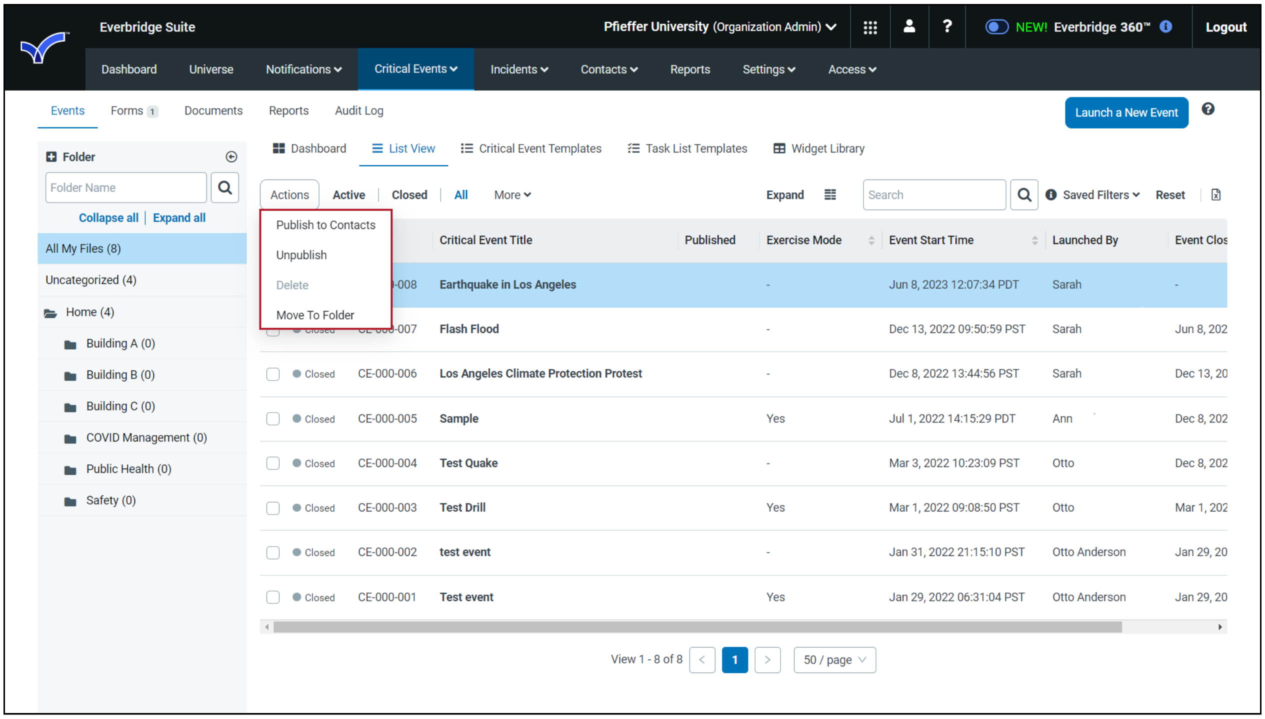
List View

You can see a list of all Critical Events for an Organization under the **List View** tab. These can be filtered by status (Active or Closed), Folders, or Date Range. It also includes the following data points for each Event:

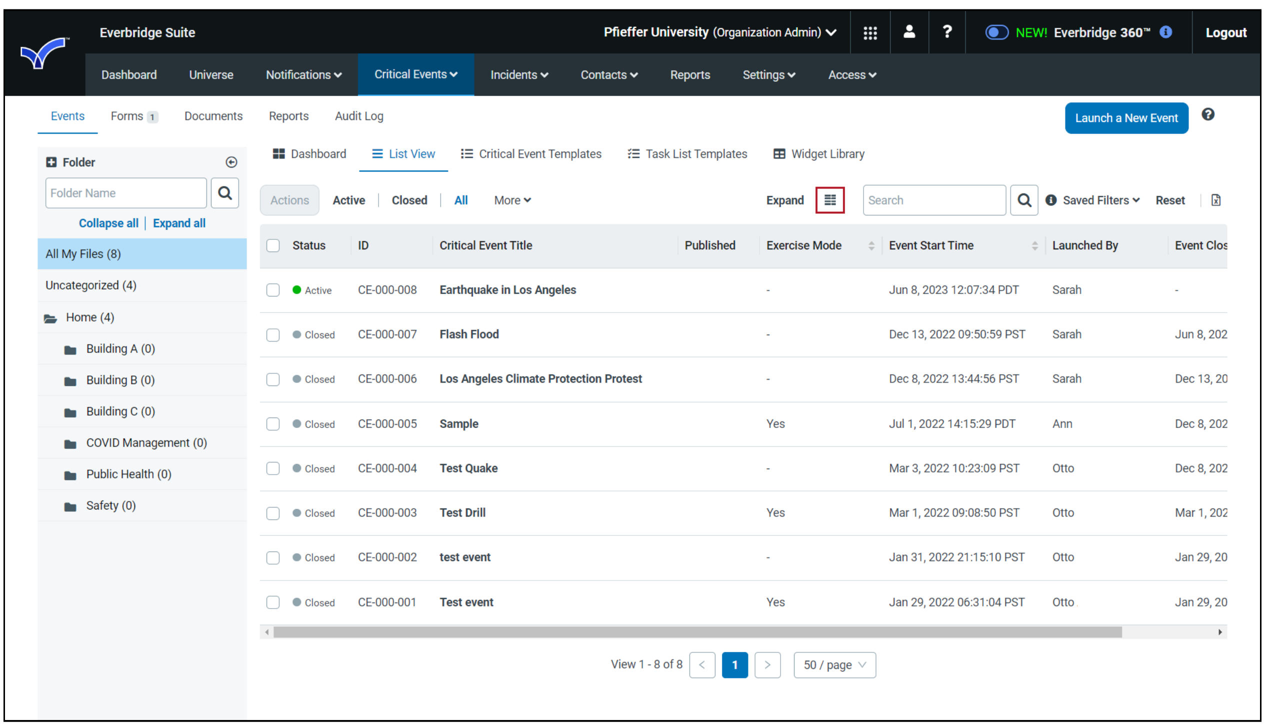
- Status
- Event ID
- Title
- Published vs. Exercise Mode
- Launched Date
- Launched By
- Closed Date

The **Actions** menu will appear once an Event has been selected by ticking its checkbox. The following options are available in the dropdown:

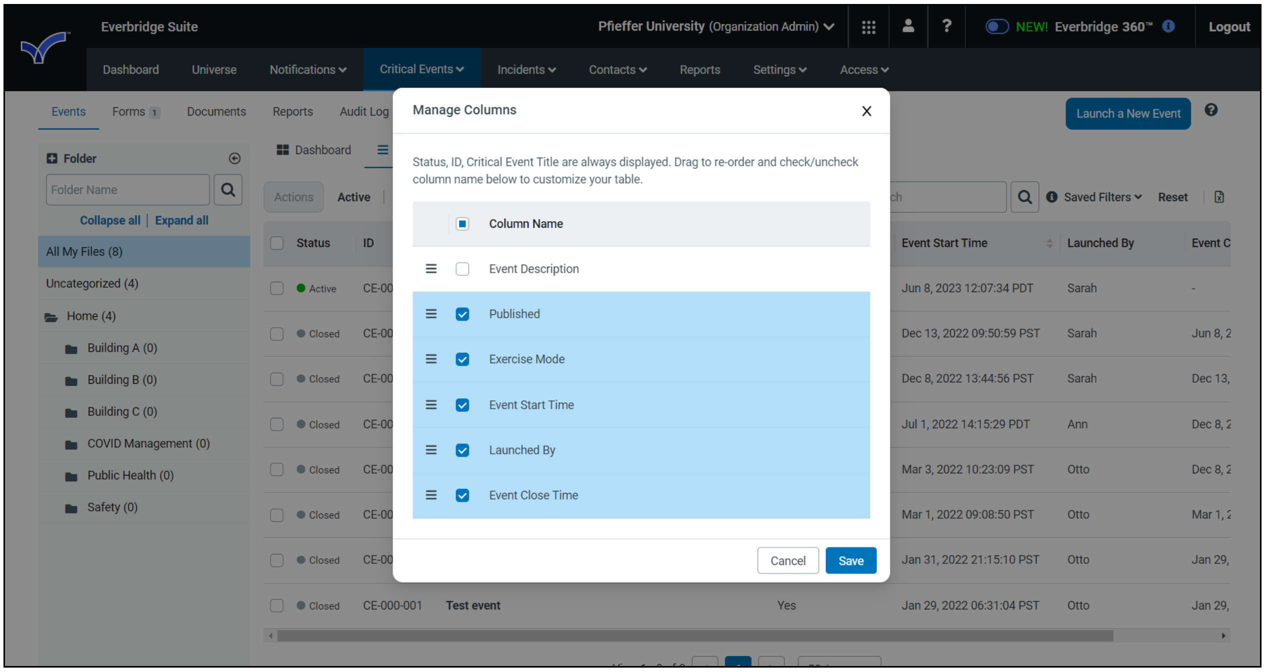
- Publish to Contacts
- Unpublish
- Delete
- Move to Folder



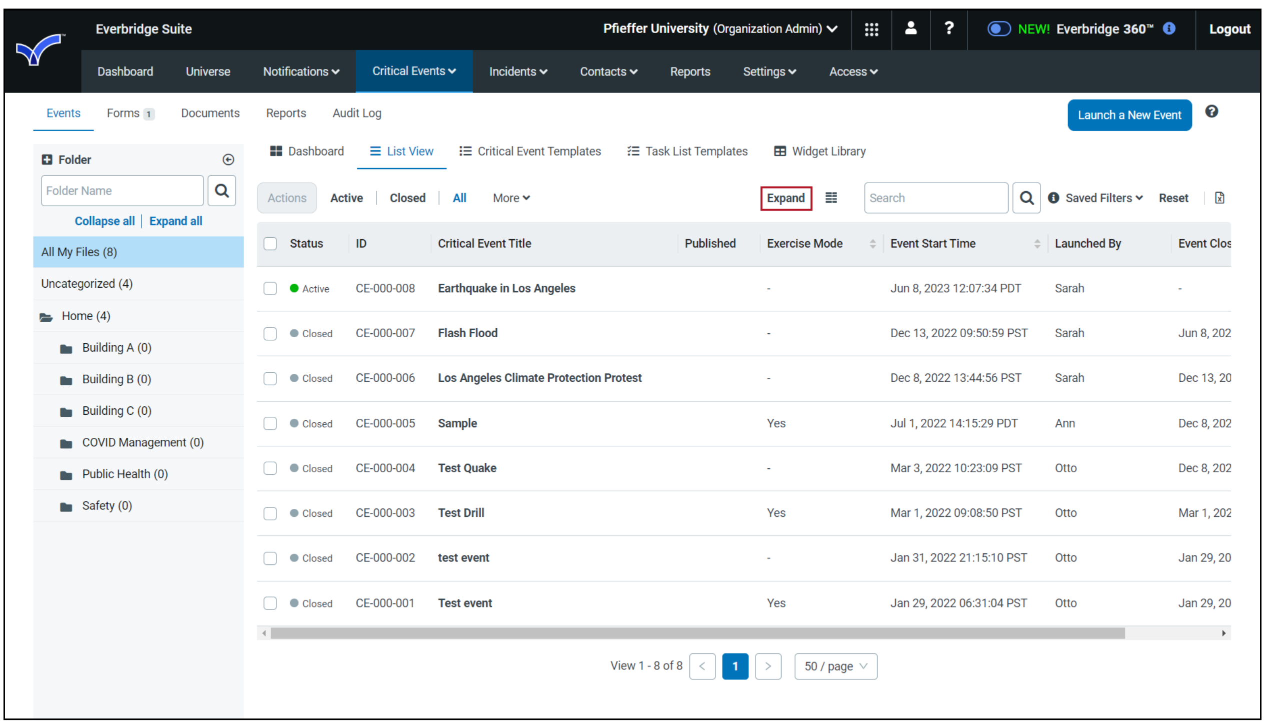
Users can customize the columns in their List View by clicking the **Manage Columns** icon.



From here, users can select or deselect the columns that they want to display, as well as click and drag to reorder them in the list.



If desired, click the **Expand/Collapse** button to either hide or reveal lengthy Event names or descriptions within the List View.



To move the Critical Event to a folder from the List View:

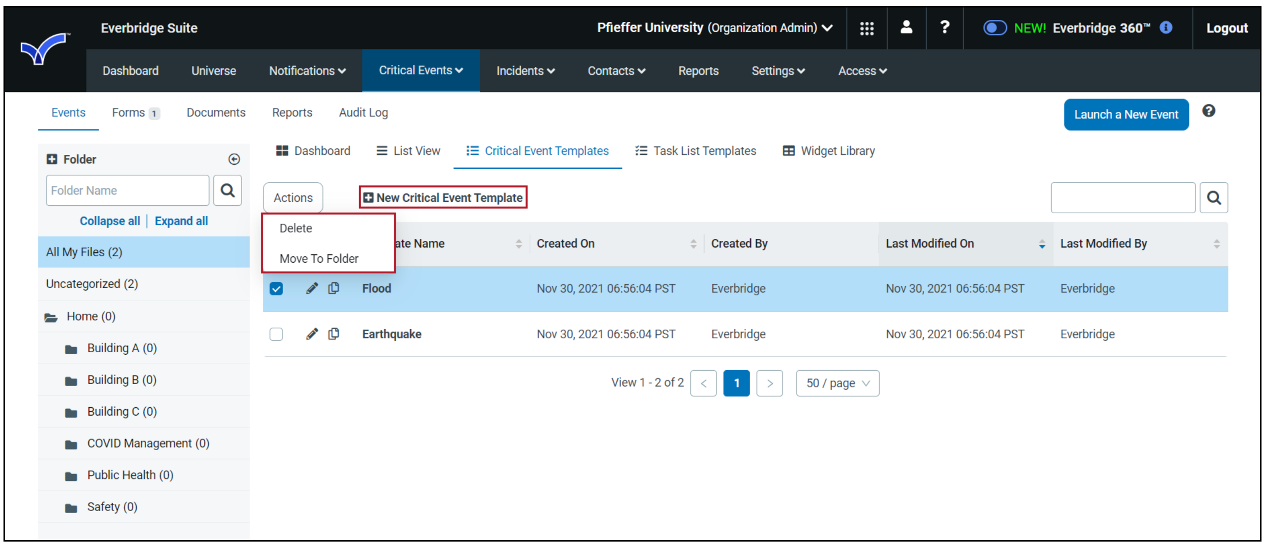
1. Select the checkbox next to its title.
2. Select **Actions > Move to Folder**. The **Add to Selected Folder** dialog appears.
3. Search or click the folder name, then click **Select Folder**.

4. To delete a Critical Event, select the checkbox next to its title, then click **Actions > Delete**.
    - If an event is active, it cannot be deleted.

Critical Events Templates

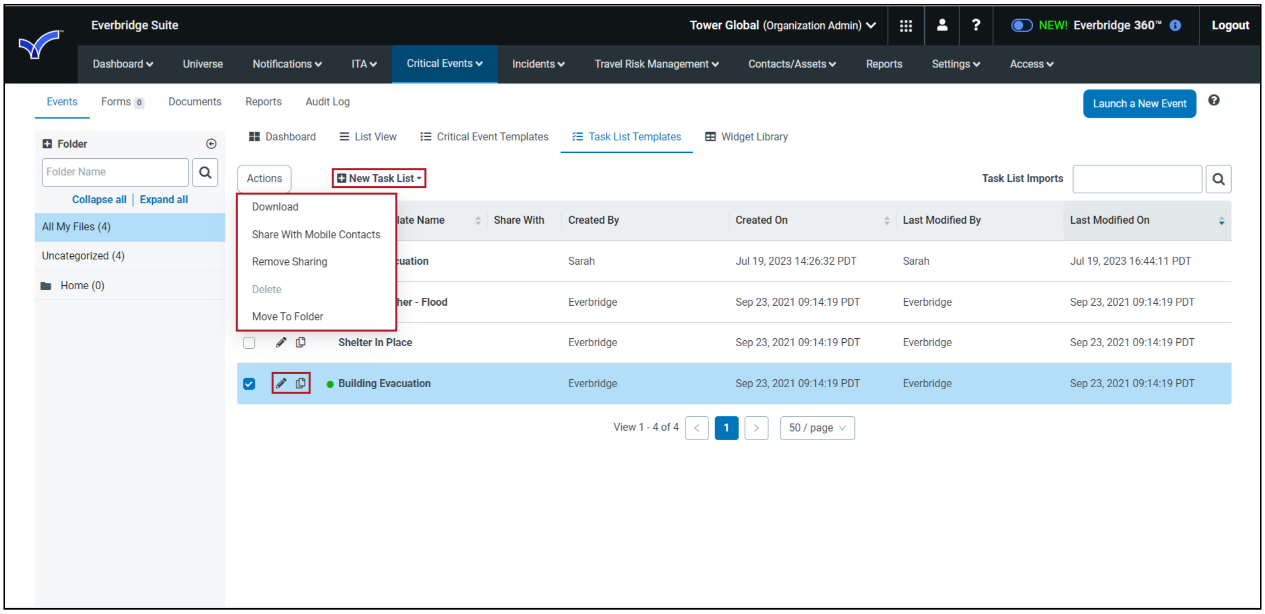
All of the Critical Event Templates for an Organization can be found on the **Critical Events Templates** tab, and Templates can be created, edited, or copied here. See [Creating a Critical Event Template] for more details on these processes.

Just like the Events themselves, Templates can also be moved to Folders for easy navigation.



Task List Templates

An Organization's Task List Templates can be found under the **Task List Template** tab. This is where these templates can be created, edited, or copied.



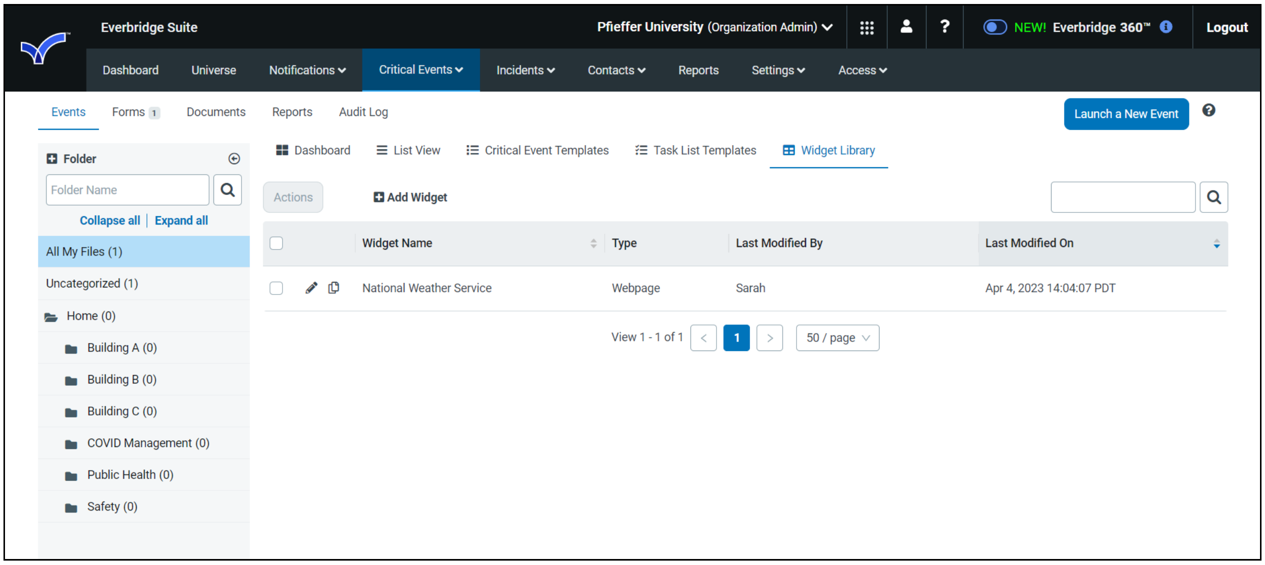
In addition, selecting one or more and clicking the Actions button will display the following options:

- Download
- Share with Mobile Contacts
- Remove from Sharing
- Delete
- Move to Folder

See Creating a Task List Template and Maintaining Task List Templates for more details.

Widgets and the Widget Library

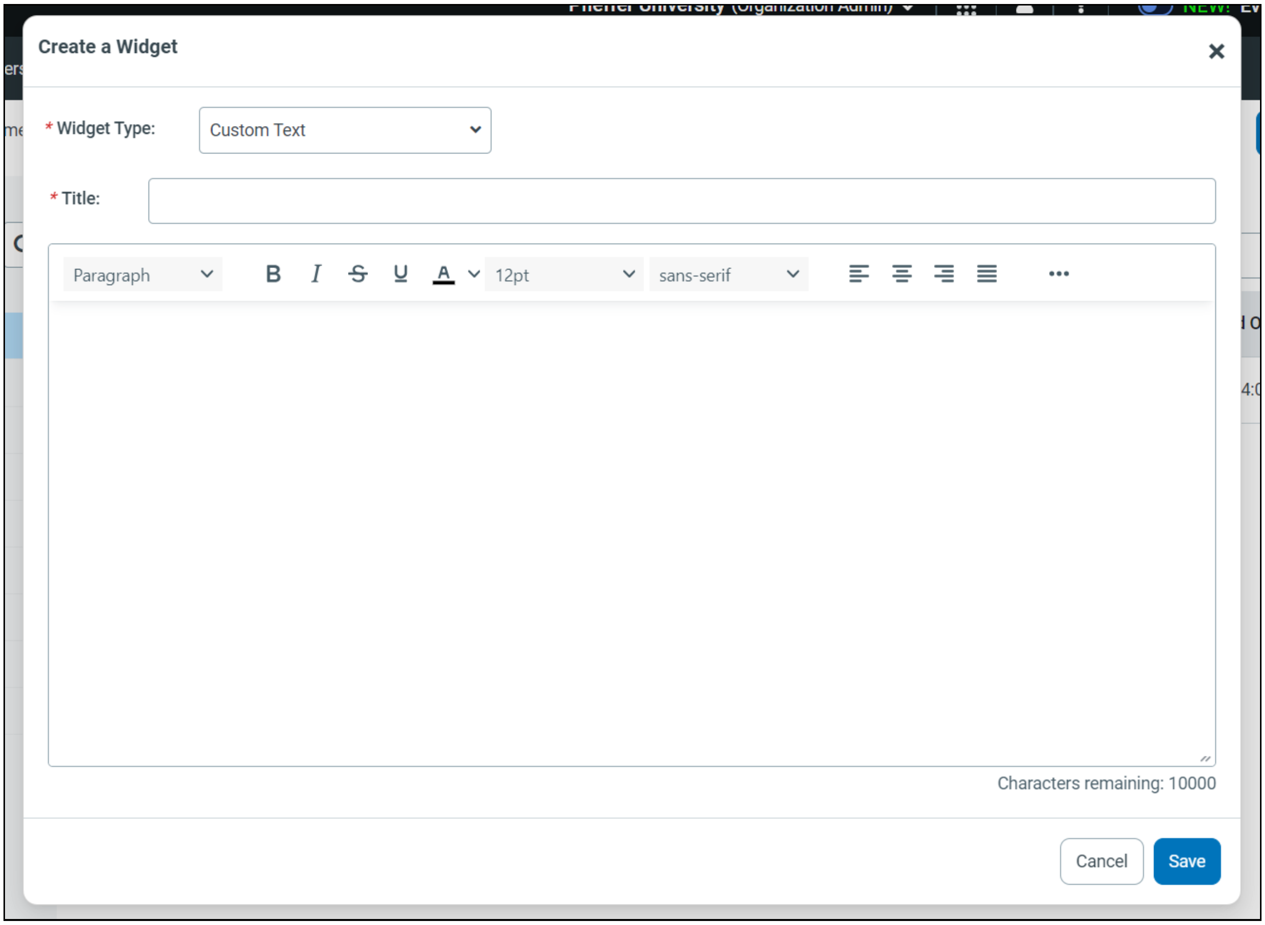
Administrators can create custom widgets (text and webpage) such as announcements, incident command team structure, reference materials, and so forth.

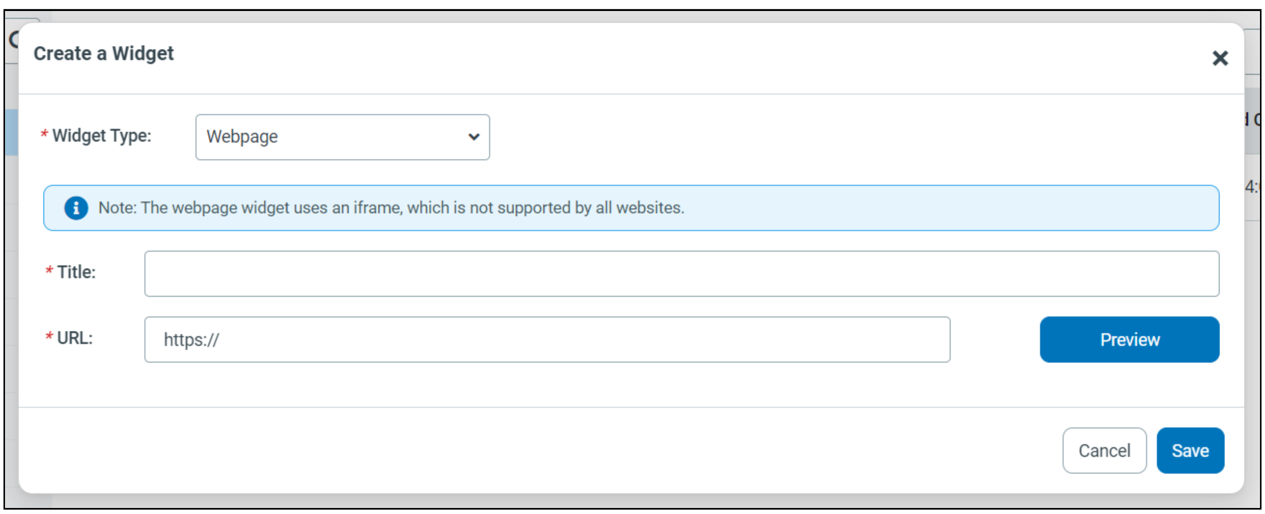


Create a Custom Widget

To create a custom widget:

1. From the Critical Events dashboard, click **Widget**.
   - Clicking **Add Widget** directly from the Widget Library is identical to this procedure.
2. Select Create. The **Create a Widget** dialog appears.
3. From the **Widget Type** field, select one of the following:
   - **Custom Text**
   - **Webpage**
   - From a single event dashboard, you can also add **Tracker** and **Form Report** widgets.
4. Click the **Add to Widget Library** checkbox, as desired.
5. In the **Title** field, enter a title for your widget.
6. Depending on the widget type you selected:
   1. **Custom Text only:** In the body, type your text. You can use the formatting features offered from the button bar above the body message pane.
   2. **Webpage only:** Enter an HTTPS URL. You can also click **Preview** to see the webpage.
      - If you enter an HTTP or HTTPS URL that contains the HTTP request, you might encounter security issues because you have secure content mixed with insecure content.
      - The webpage widget uses an iFrame, which is not supported by all websites.
7. Click **Save**.





Your widget is automatically added to the Critical Event Home dashboard. Additionally, if you added the widget to the Widget Library, it will be listed there as well.

Edit a Widget

To edit a widget from the Widget Library:

1. From the Critical Event **Home** dashboard, click **Widgets** in the Library menu. The Widget Library page appears.
2. Click the Pencil icon next to the widget you want to edit. The **Edit a Widget** dialog appears.
3. Other than the Widget Type, make any updates and click **Save**.
4. Perform any of the following actions from the **Widget Library** page:
    - Create a new widget
    - Copy a widget
    - Delete a widget from the Widget Library
    - Move a widget to a folder
    - Add a new widget to the dashboard

Copy a Widget in the Widget Library

To copy a widget in the Widget Library:

1. From the Critical Event **Home** dashboard, click **Widgets** in the **Library** menu. The **Widget Library** page appears.
2. Click the Copy icon next to the widget you want to duplicate. The **Copy Widget** dialog appears.
3. Rename it as needed and click **OK**.

Use the **Edit a Widget** procedure above to change the contents of the widget.

Delete a Widget

To delete a widget from the Widget Library:

1. From the Critical Event **Home** dashboard, click **Widgets** in the **Library** menu. The **Widget Library** page appears.
2. Select the checkbox next to the desired widget.
3. Click **Delete**. The **Delete Widget** dialog appears.
4. Click **Delete Widget** to confirm the deletion permanently from the Widget Library.

Move a Widget

To move a widget in the Widget Library to a folder:

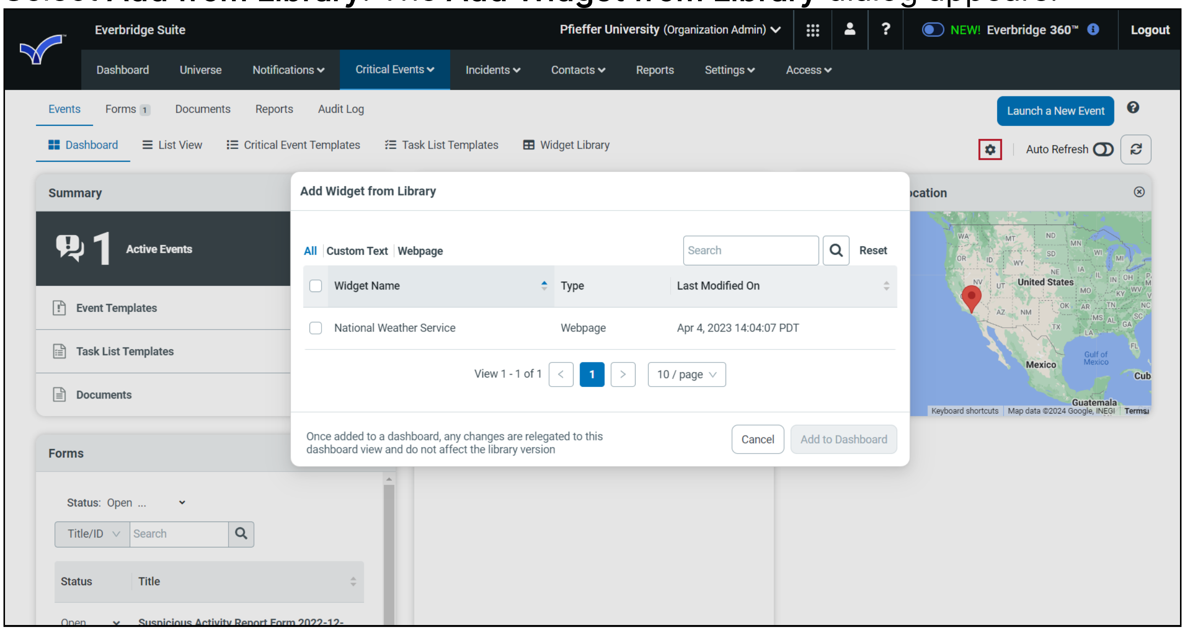
1. From the Critical Event **Home** dashboard, click Widgets in the Library menu. The Widget Library page is displayed.
2. Click the checkbox next to the widget you want to move.
3. Select **Move to Folder** from the **Actions** menu. The **Move to Selected Folder** dialog appears.

4. Select the desired folder name, or search to it first if not in the displayed list, then click **Select Folder**. Your widget is moved to the selected folder. It also remains as a widget in the Widget **Library** list.

Add a Custom Widget

To add a custom widget from the Widget Library to the dashboard:

1. From the Critical Event **Home** dashboard, click **Widget**.
2. Select **Add from Library**. The **Add Widget from Library** dialog appears.



3. If the list is long, narrow down the list by clicking **Custom Text** or **Webpage** if you know the widget type. Otherwise, type the Widget Name in the **Search** field and click the Search icon.
4. After finding the widget you want, select the checkbox next to its name and click **Add to Dashboard**.
    - Checkboxes that are grayed out indicate the widget is already on the dashboard.

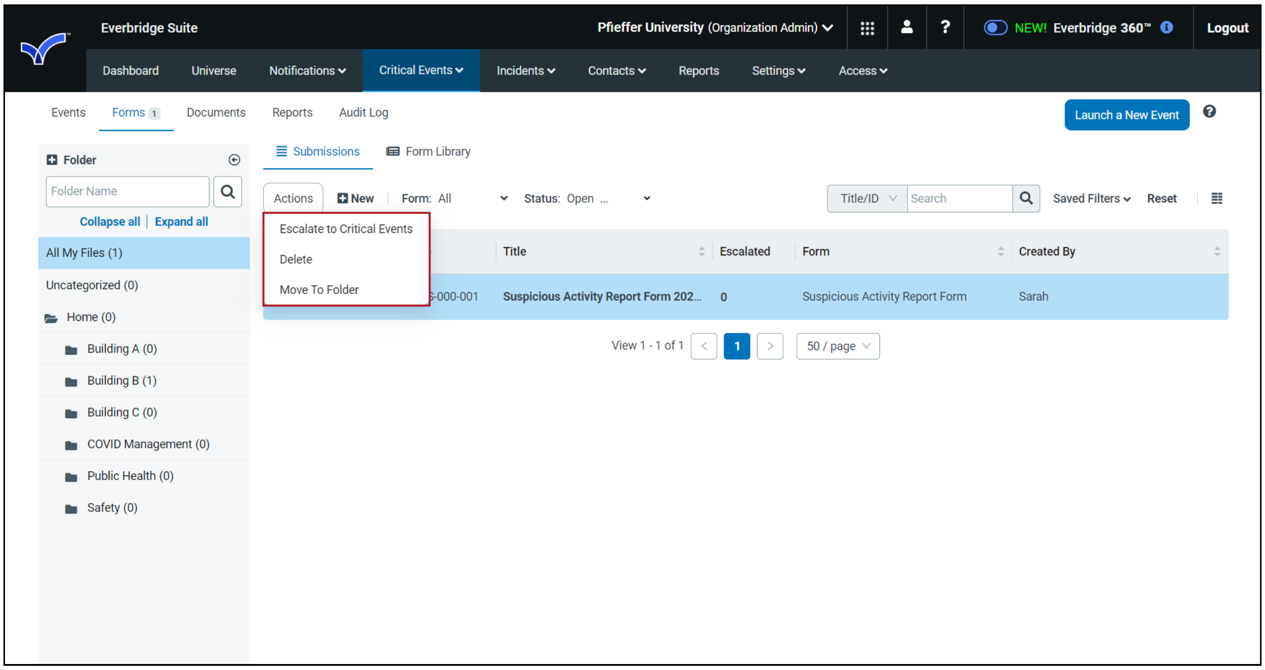
Forms

The Forms section can be renamed as desired by the Organization (often "Requests") and is where both the Submissions and Form Library are found.

The **Submissions** subtab shows all of the Submissions for an Organization and allows you to create a new one. It provides three Actions to take after selecting one or more Submission:

- Escalate to Critical Events
- Delete

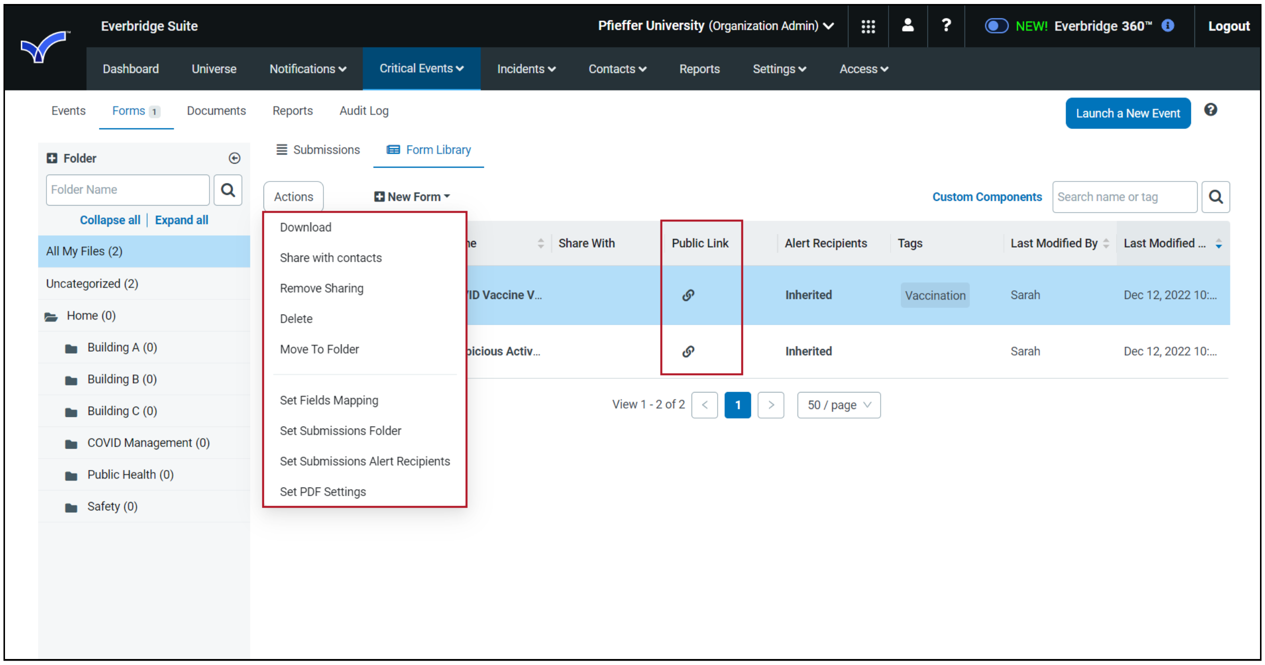
- Move to Folder



The **Forms Library** subtab houses all of an Organization's Forms. Clicking the Public Link icon allows you to share a form externally to collect data from outside sources.

Selecting a Form enables the following Actions to be taken:

- Download
- Share with Contacts
- Remove Sharing
- Delete
- Set Fields Mapping
- Set Submissions Folder
- Set Submissions Alert Recipients
- Set PDF Settings



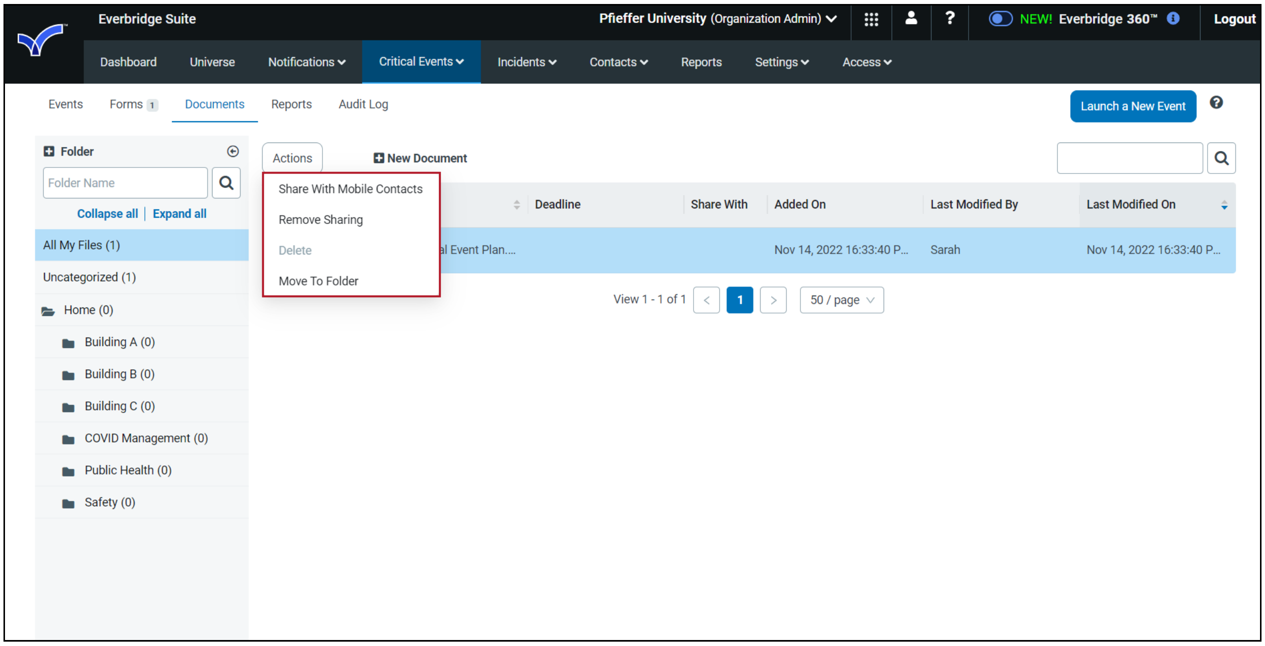
To learn more about this section's functionality, refer to the [Form Library Overview](#).

Documents

The **Documents** tab hosts an Organization's important documents, video files, audio files, and more. Documents can also be added and created here, as well.

Selecting the checkbox next to a Document will make the following Actions available:

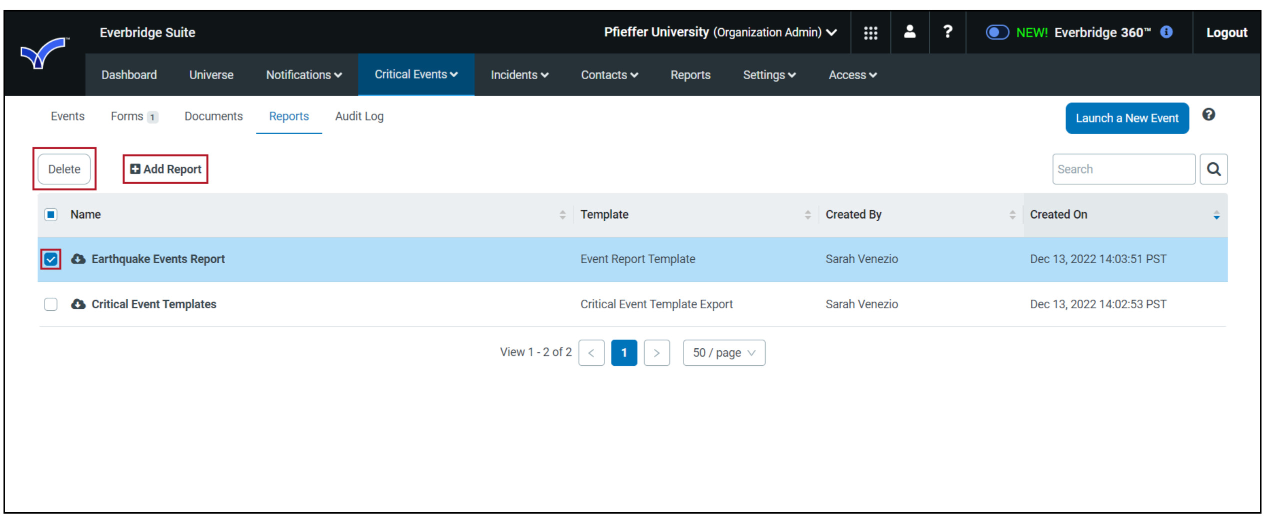
- Share with Mobile Contacts
- Remove Sharing
- Delete
- Move to Folder



For more on the Documents tab functionality, see [Maintaining Documents].

Reports

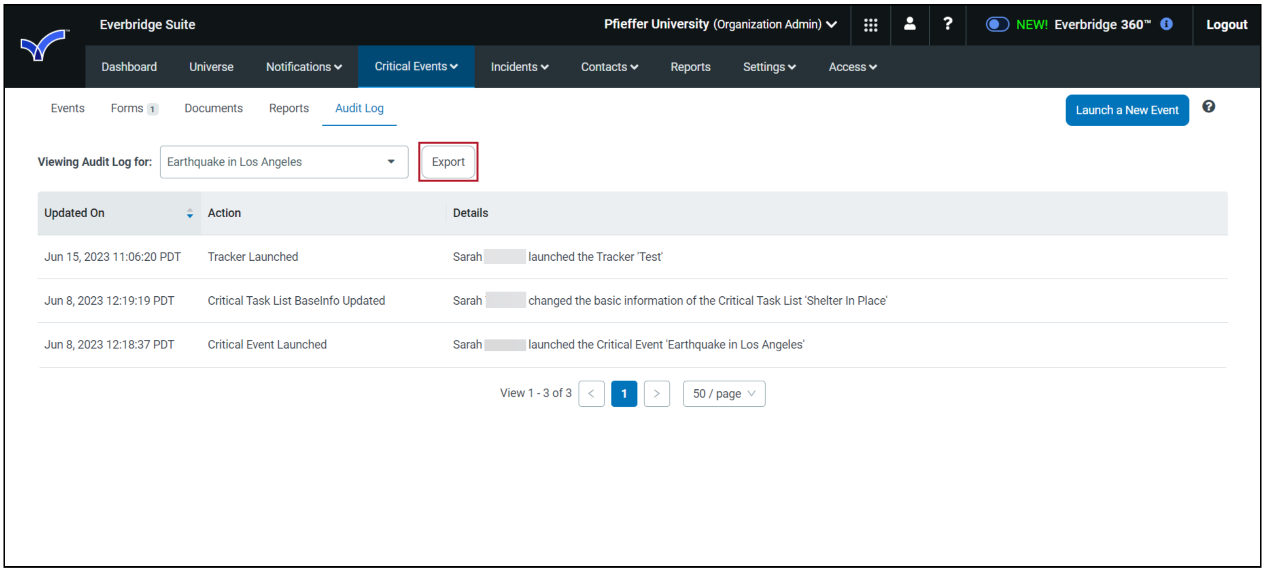
Critical Event reports can be found and created under the **Reports** tab, where they're available for download. Click one from the list to view to download it as a PDF, or select the checkbox and click **Delete** to remove it.



For more on this section, refer to [Critical Event Report].

Audit Log

The **Audit Log** provides a detailed log of a specific Critical Event, which can then be exported as a .csv file.



For more on the Audit Log, refer to [Viewing the Event Audit Log].

Launch a Critical Event

When a crisis happens, you can create a new event from any of the Critical Event subtabs:

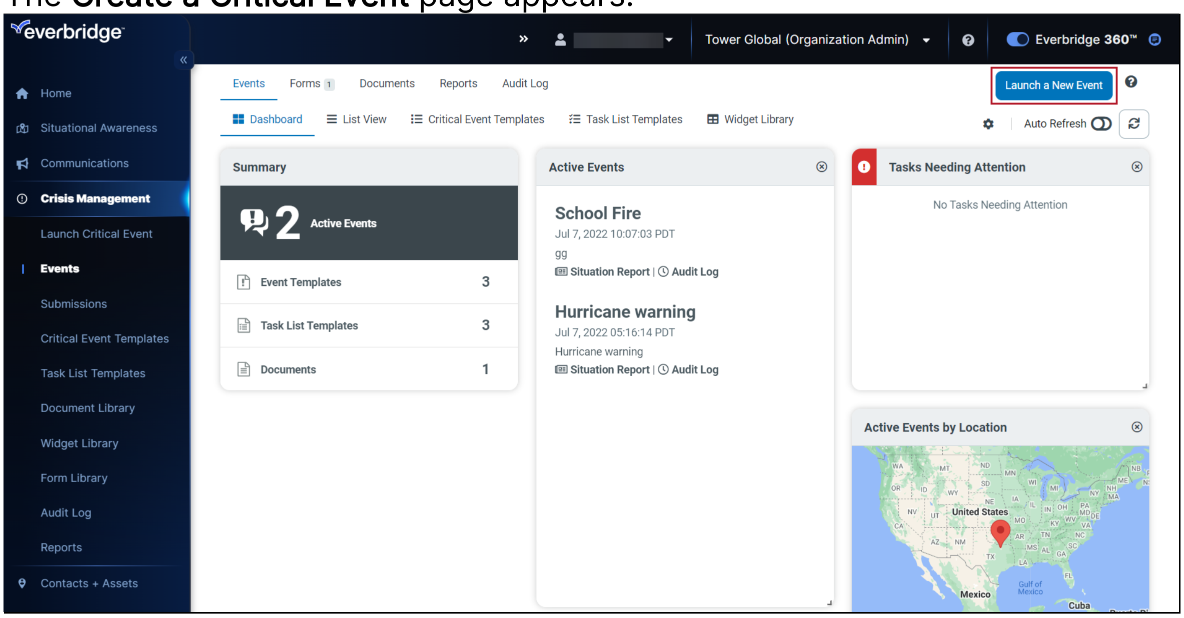
- **Critical Events Home Page**
- **Critical Event Templates**
- **Task List Templates**
- **Document Library**
- **Audit Log**

You can create an ad-hoc Critical Event or use a preconfigured Critical Event Template. If you use a Critical Event Template, the fields are prefilled, Task Lists are included, communication templates are preconfigured, and reference materials are uploaded.

Launching a Critical Event With a Template

To launch a Critical Event using a Critical Event Template:

1. From any sub-tab under the **Critical Events** tab, click **Launch a New Event**. The **Create a Critical Event** page appears.

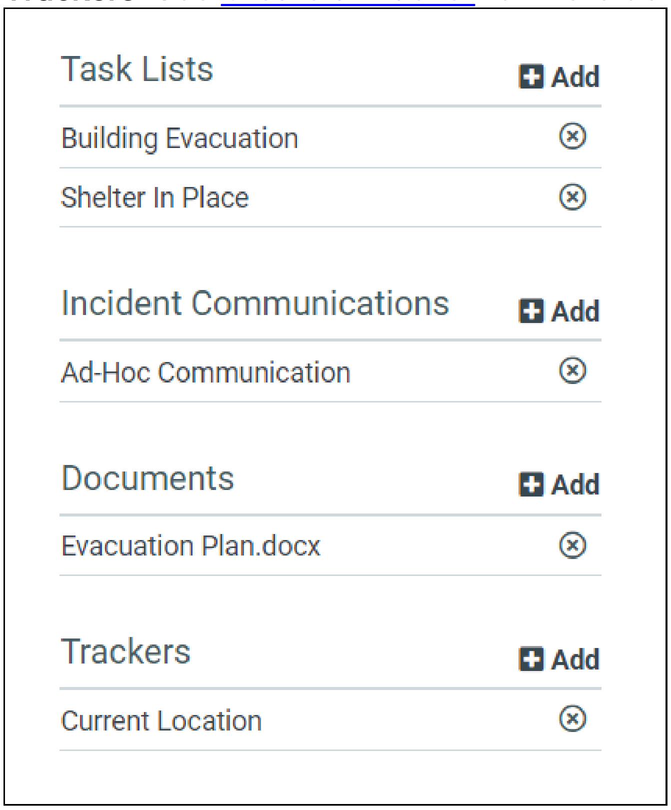


2. Select the desired Critical Event Template under the **Templates** heading on the left-hand side of the page. Note that only Live templates can be selected, as templates still in a Draft state won't appear in the list.
   - When you select the Critical Event Template, the prefilled form appears.
   - For details on creating a Critical Event Template, see Creating a Critical Event Template.
3. If this is a drill, select the **Exercise Mode** toggle.

- Incident Management supports Exercise Mode as well. For example, when you navigate from an Incident Template in the **Critical Events** tab to the **Incidents** tab, **Exercise Mode** is automatically turned on in Incidents.

4. Optionally, click **Add Custom Fields** to add Organization Incident Variables to the Critical Event.
   - Search and select the checkbox next to the desired Incident Variable name(s).
     - The following Incident Variables are not supported:
       - Geopoint
       - Location: Geo Shapes
       - On-shift Date Range
   - If required, select that checkbox as well.
   - Click **Add**. The custom field is added to the bottom of the template.
   - To reorder the custom field, click the Hamburger icon and while holding the mouse, drag the field to its new position.
   - If the custom field was created by mistake, click **X** to delete it.
5. Select the **Turn off Notification for Task Assignment and Dashboard Sharing** checkbox to turn off the Notification when launching the event.
6. Click **OK**. You will see the word **DRILL** prepended to the title of the Critical Event. An email or SMS is sent, indicating the Notification is a DRILL.
7. Optionally, complete or edit the following fields. Required fields are shown with a red asterisk (*):
   - **Title*** - The name of the Critical Event. The title can contain up to 800 characters.
   - **Description*** - Text describing the Critical Event.
   - **Event Type*** - Select the Event Type from the menu.
   - **Owner** - Replace the current owner's name by clicking **Edit** and selecting a different name, or remove the current owner's name by clicking **Remove**.
   - **Location** - Change the location by clicking Edit an address, then select a new location from the Select a Location dialog. Or, click **Use Shapes on the Map**. When you click Select this Location, the latitude and longitude are copied to the clipboard.
   - **Location Name** - Enter a location description, such as an address.
   - **Event Time Zone*** - Select the time zone from the drop-down list.
   - **Event Start Time*** - Click the Calendar icon to select the date and time.
   - **Event Close Time** - If this Event has a scheduled ending, specify that here by choosing a date from the dropdown menu.

  - **Turn off Task List Notifications** - Select the checkbox to turn off Task List Notifications, which are enabled by default.
  - **Folder** - Select the folder where this new Critical Event will be saved.
8. Optionally, along the right-hand side of the page, click **Add** to add any of the following from your Organization:
   - **Task Lists** from existing Task List Templates. See Creating a Task List Template.
   - **Incident Communications** from existing Incident Templates.
   - **Documents** from existing Documents. For details about adding documents, see Add Document to Task.
   - **Trackers**. See Create a Tracker for more details.



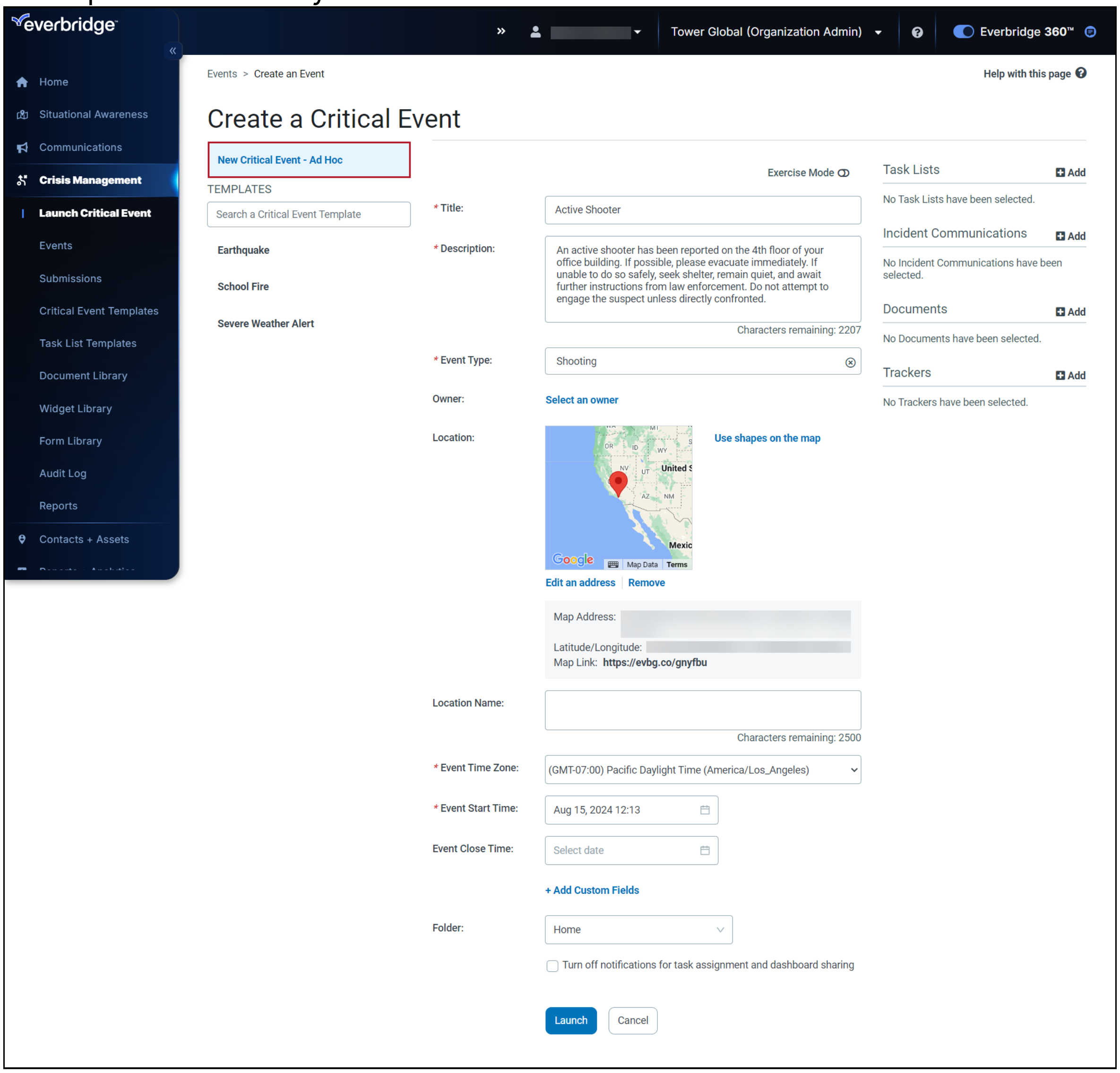
     - **NOTE**: The Critical Event Template may already have attached items, which can be removed if necessary by clicking the **X** icon.
9. Click **Launch**.

Launch an Ad-Hoc Critical Event

Some events are so specific or unpredictable that an Organization may not have created a Critical Event Template to capture them. Ad-hoc Critical Events can be launched in this situation, allowing operators to fill in the details themselves.

To launch an ad-hoc Critical Event:

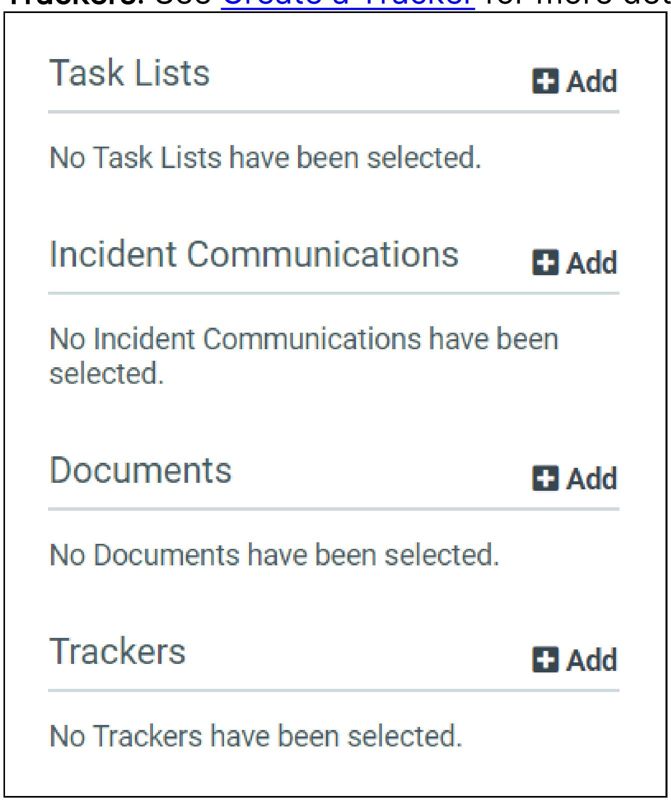
1. From the **Critical Events** tab, click **Launch a New Event**.
2. The **Create an Event** page appears. By default, the **New Critical Event - Ad Hoc** option will already be selected.



3. Complete the following fields. Required fields are shown with a red asterisk (*):
   - **Title*** - The name of the Critical Event. The title can contain up to 800 characters.
   - **Description*** - Text describing the Critical Event.
   - **Event Type*** - Select the event type from the menu.
   - **Owner** - Replace the current owner's name by clicking **Edit** and selecting a different name, or remove the current owner's name by clicking **Remove**.

- **Location** - Change the location by clicking Edit an address, then select a new location from the Select a Location dialog. Or, click **Use Shapes on the Map**. When you click **Select this Location**, the latitude and longitude are copied to the clipboard.
- **Location Name** - Enter a location description, such as an address.
- **Event Time Zone*** - Select the time zone from the drop-down list.
- **Event Start Time*** - Click the **Calendar** icon to select the date and time.
- **Event Close Time** - If this Event has a scheduled ending, specify that here by choosing a date from the dropdown menu.
- **Turn off Task List Notifications** - Select the checkbox if you want to turn off Task List Notifications. The default is on.
- **Folder** - Select the folder where this new Critical Event will be saved.

4. Optionally, along the right-hand side of the page, click **Add** to attach any of the following items from your Organization:
   - **Task Lists** from existing Task List Templates. See Creating a Task List Template.
   - **Incident Communications** from existing Incident Templates.
   - **Documents** from the Organization's Documents Library. For details about adding documents, see Add Document to Task.
   - **Trackers**. See Create a Tracker for more details.



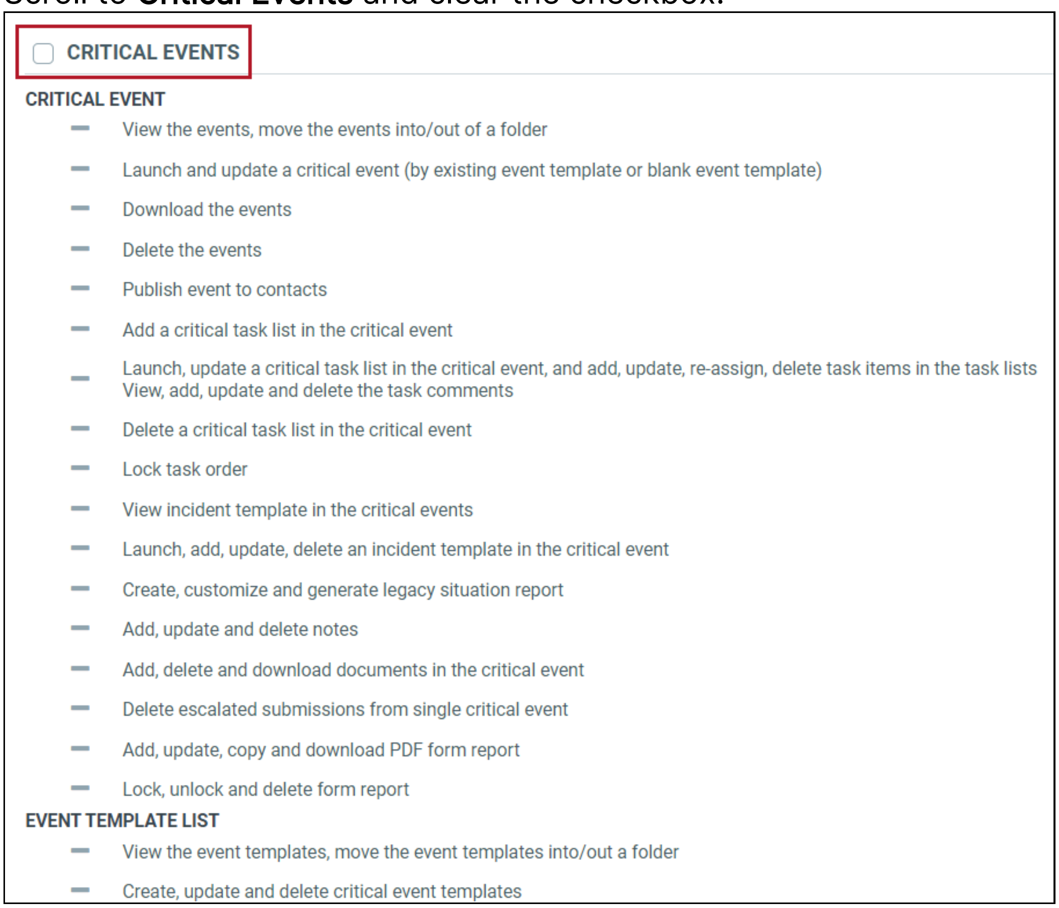
5. Click **Launch**.

Hiding Crisis Management from Selected Incident Operators

Administrators can hide the Crisis Management product from selected incident operators. **Clearing the Critical Events** checkbox from the **Roles** page will remove access to Crisis Management for Incident Operators.

To hide Crisis Management from selected Incident Operators:

1. From the Access tab, select **Roles**.
2. From the left-hand panel, select the desired incident operator from which you want to hide Crisis Management. The **Edit Role** page appears for that role.
3. Click **Permissions**.
4. Scroll to **Critical Events** and clear the checkbox.

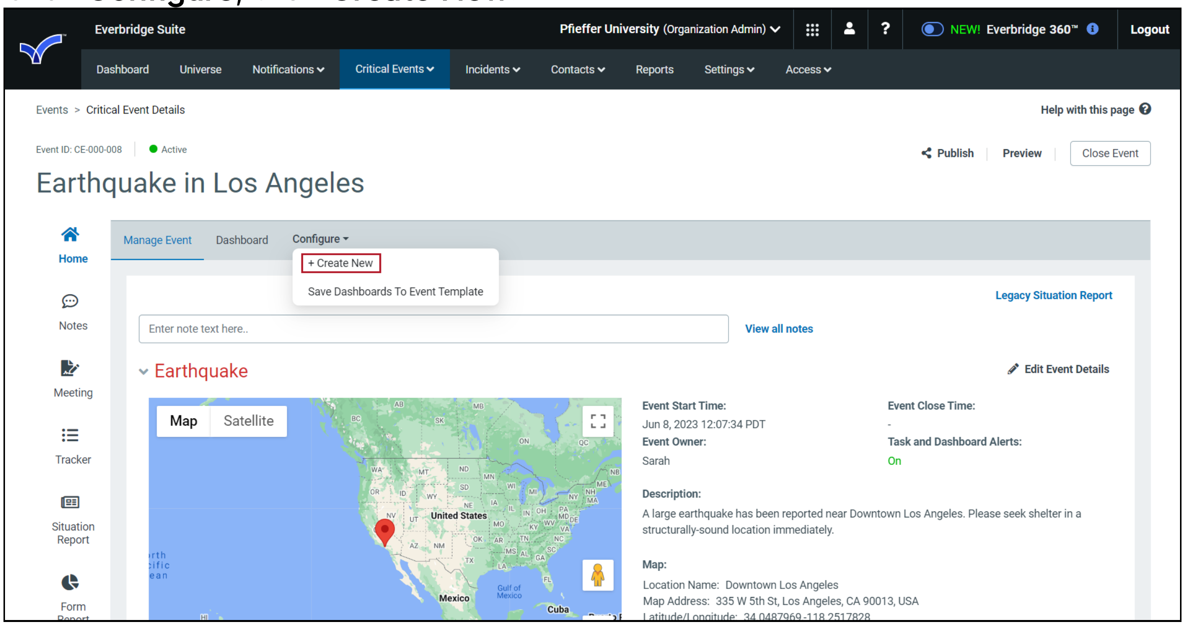


After your Incident Operator is trained, select the **Critical Events** checkbox to allow access to Crisis Management.

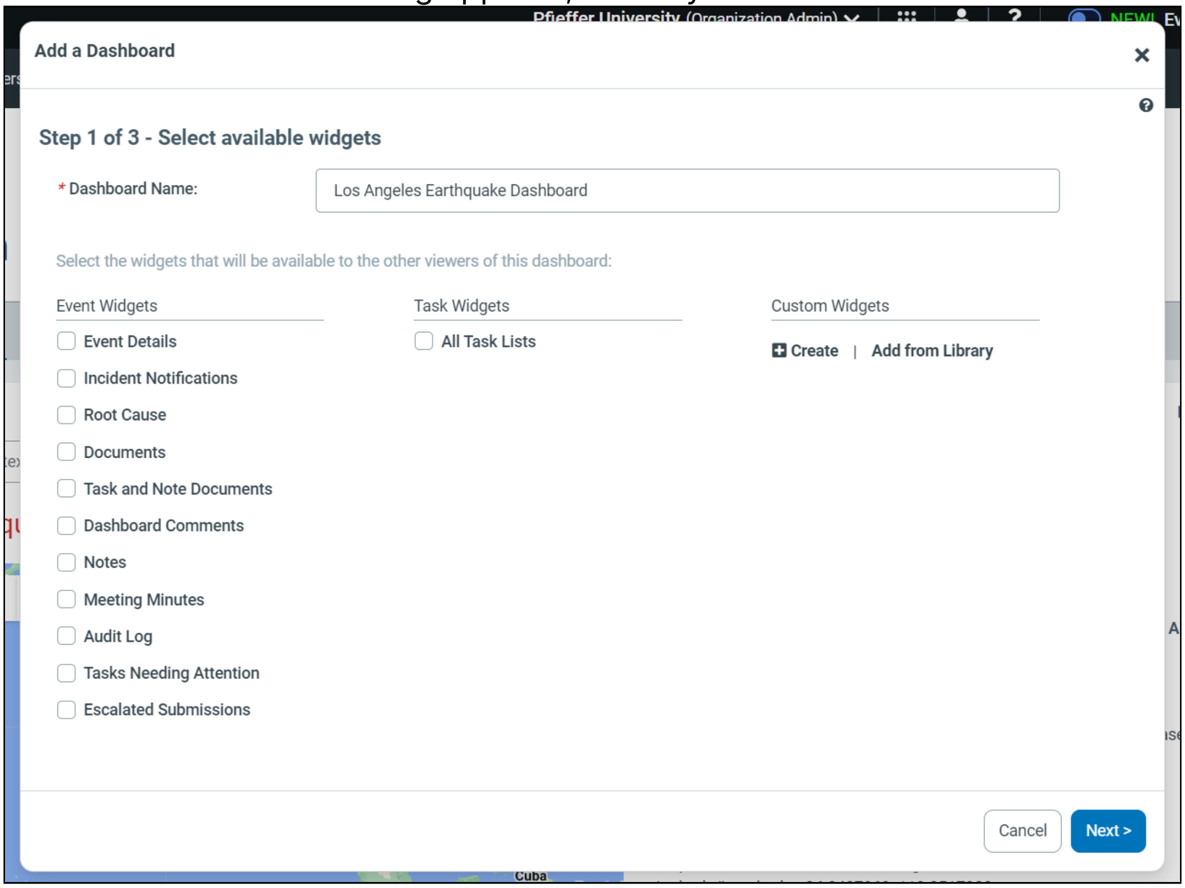
Creating a Single Event Dashboard

To create a Single Event Dashboard:

1. From the **Critical Event Home** page, select an Active event. The **Critical Event Details** page of that event appears.
2. Click **Configure**, then **Create New**.



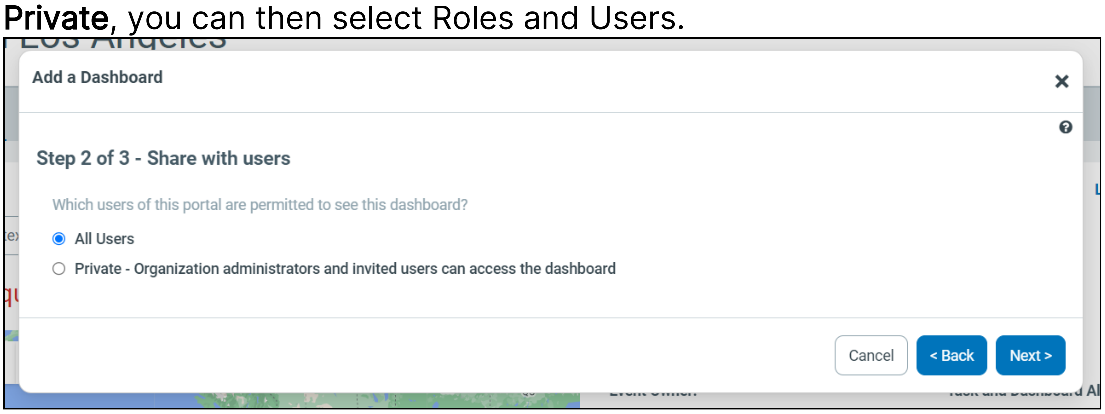
3. The **Add a Dashboard** dialog appears, where you can name the dashboard.



4. Select the Event Widgets, Task Widgets, and Individual Task Lists, if available, that you want to see on your dashboard.
   - Choose Event Widgets from the following:
     - **Event Details** - You can edit the widget title, and edit event details.
     - **Incident Notifications** - You can edit the widget title, and add Incident Templates.
     - **Root Cause** - If applicable, you can specify the root cause of the Critical Event.
     - **Documents** - You can edit the widget title, add documents, and upload new documents.
     - **Dashboard Comments** - You can add comments about a single dashboard in the event. Dashboard Comments are only shared with others who have access to the dashboard. Users can edit or delete their own comments, while Administrators can edit or delete those left by others.
     - **Task and Note Documents** - Displays documents attached to Tasks or Notes.
     - **Dashboard Comments** -
     - **Notes** - You can edit the widget title, and add notes to your dashboard, including up to 4 attachments (images and other file

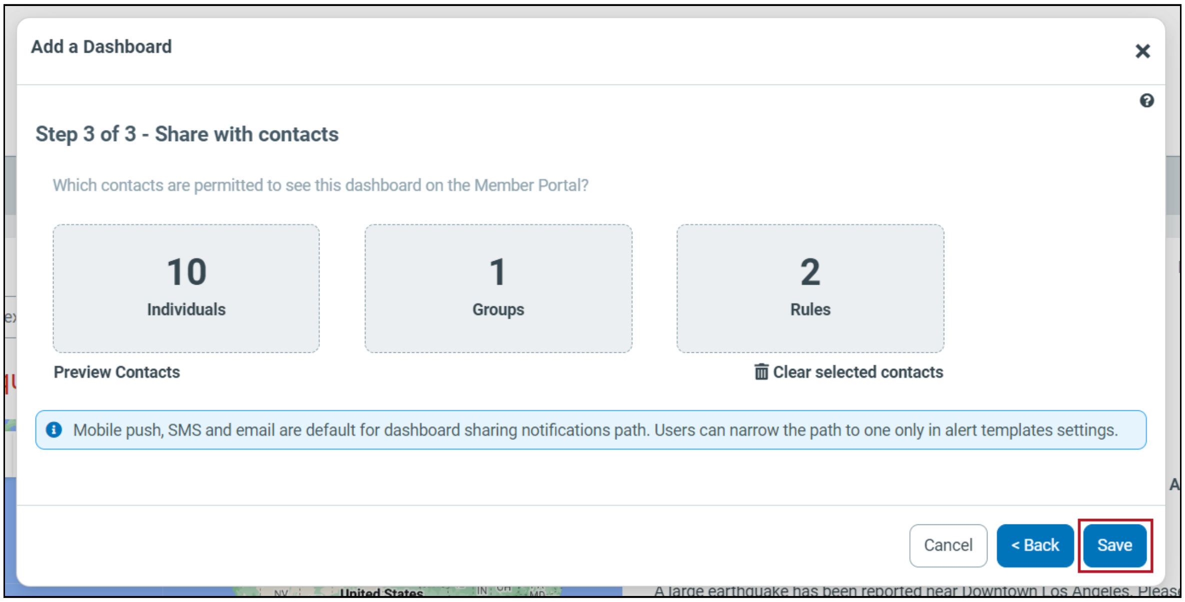
types). Notes are shared across the event. Users can edit or delete their own notes, while Administrators can edit or delete those left by others.
- **Meeting Minutes** - View a record of what happened during a meeting.
- **Audit Log** - You can see an Event Audit Log, Dashboard Audit Log, or both. You can also export the audit logs.
- **Tasks Needing Attention** - You can see the tasks that need attention. Click a task to see its Task List Details, from which you can change the status of a task list item. You can also add comments to a task, including a maximum of 4 files.
- **Escalated Submissions -**

5. Click the text field.
6. Type your note in the provided field, up to 5,000 characters.
7. Click the Upload icon to add up to four files, including images and other types of files.
8. Navigate to the desired file and click **Open**.
9. Click **Add Note**.
   - Repeat steps 4 through 9 to add an additional note.
10. If you added an **All Task Lists** widget, the user can see all the tasks that need your attention. Click the task list on which you want to work.
11. Optionally, click **Create** to create a custom widget.
    - From the **Widget Type** field, select **Custom Text** or **Webpage** from the menu.
    - Follow the Create a Custom Widget procedure to finish creating the widget.
12. Click **Next** to advance to **Step 2 of 3 - Share with users** and select the radio button for which users of this portal are permitted to see this dashboard:
    - **Public** - Share with all users within an Organization.
    - **Private** - Organization Administrators and invited users. If you select **Private**, you can then select Roles and Users.

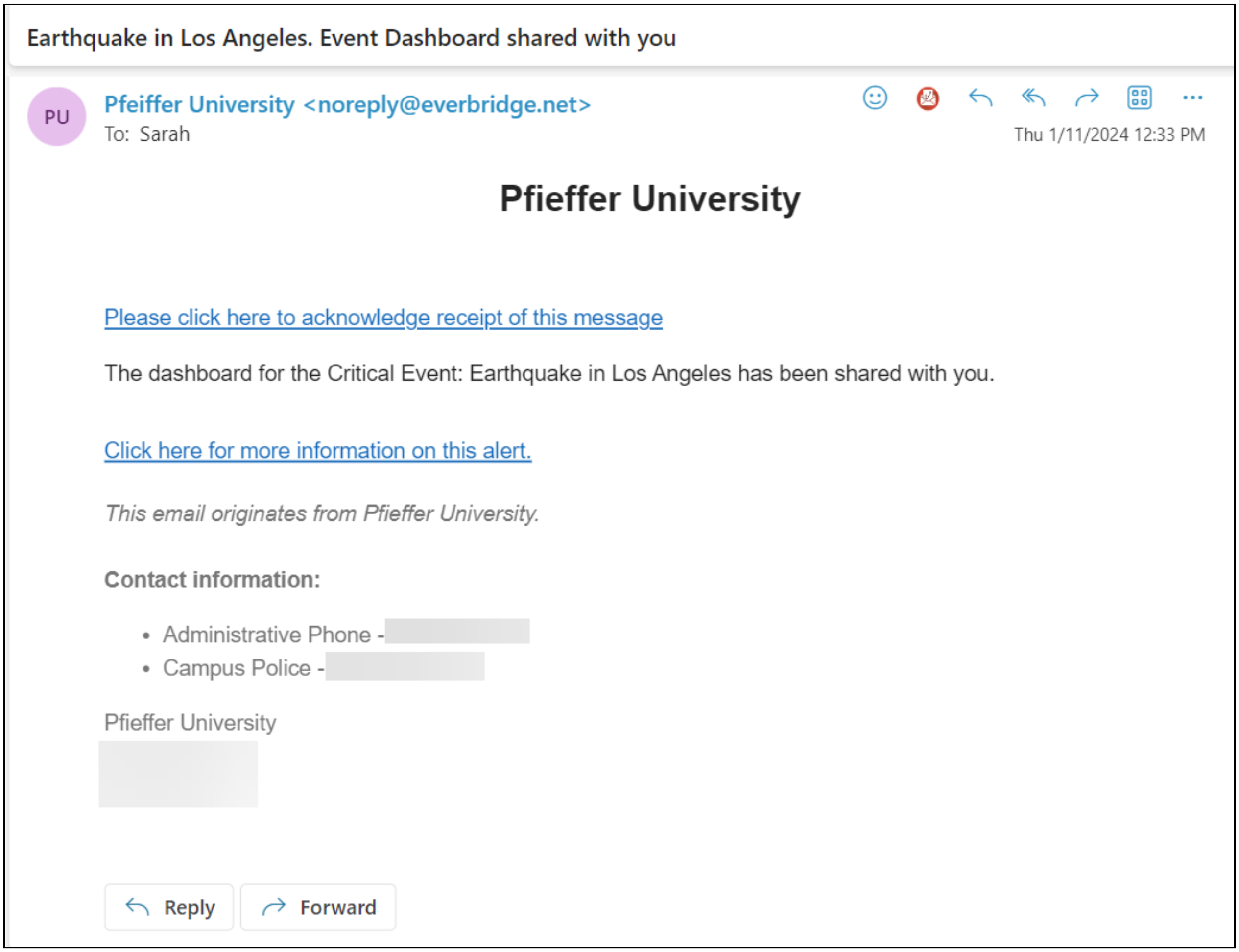


13. Click **Next** to advance to **Step 3 of 3 - Share with contacts**. Later, you can click **Share Externally** to select which contacts are permitted to see this dashboard on the Member Portal.

14. Select your contacts via Individuals, Groups, or Rules.
    - Optionally, click **Preview Contacts** to see the list of contacts from each category.
    - Optionally, click **Clear** to remove all contacts from the list and start over.
15. Click **Save**.



All selected contacts will receive a link via email and SMS. See Viewing Single Event Dashboards from the Member Portal.

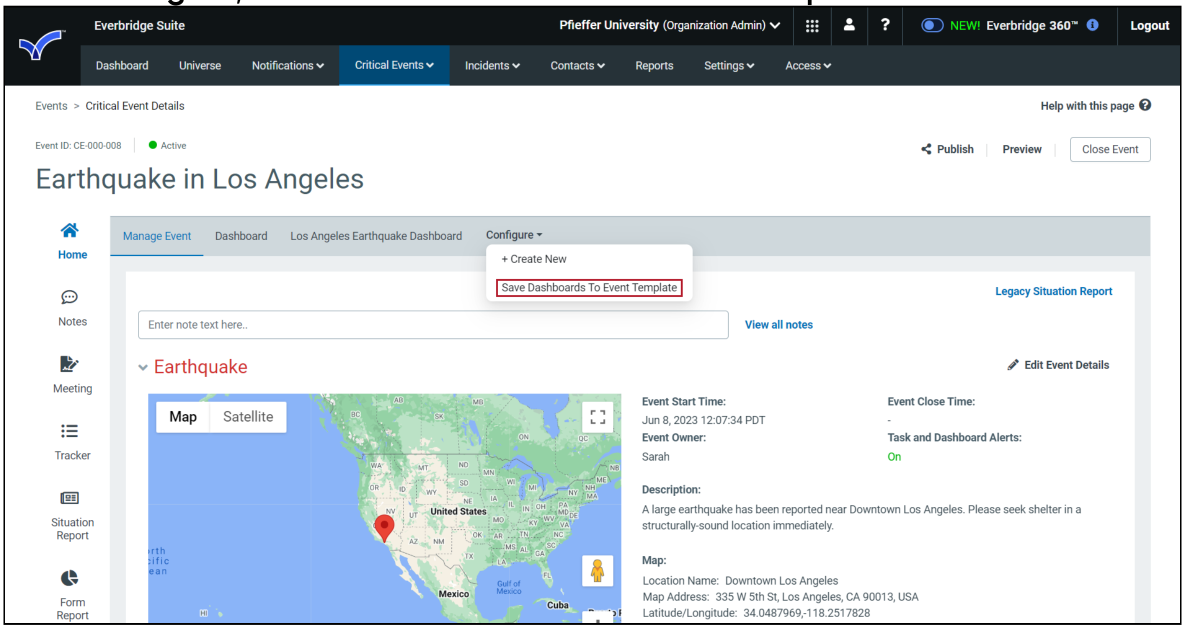


Save Dashboards to Event Template

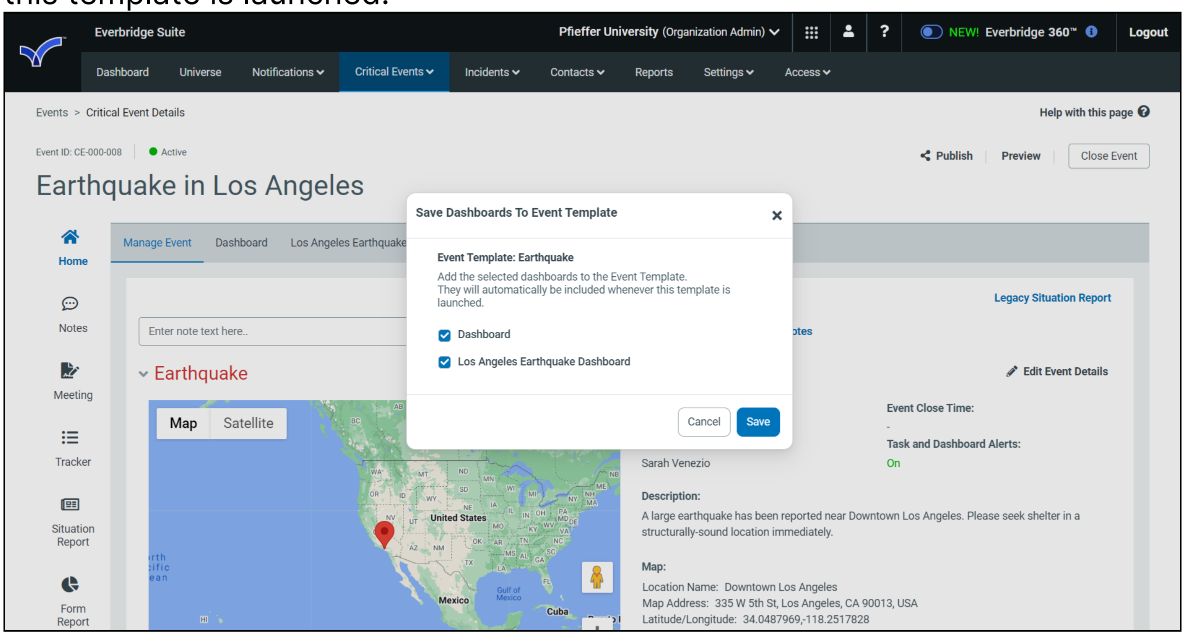
To save dashboards to an event template:

1. From the **Critical Event Home** page, select an Active event. The **Critical Event Details** page of that event appears.

2. Click **Configure**, then **Save Dashboards to Event Templates**.



3. The **Save Dashboards to Event Template dialog** appears. Select the checkboxes of the dashboards you want automatically included whenever this template is launched.

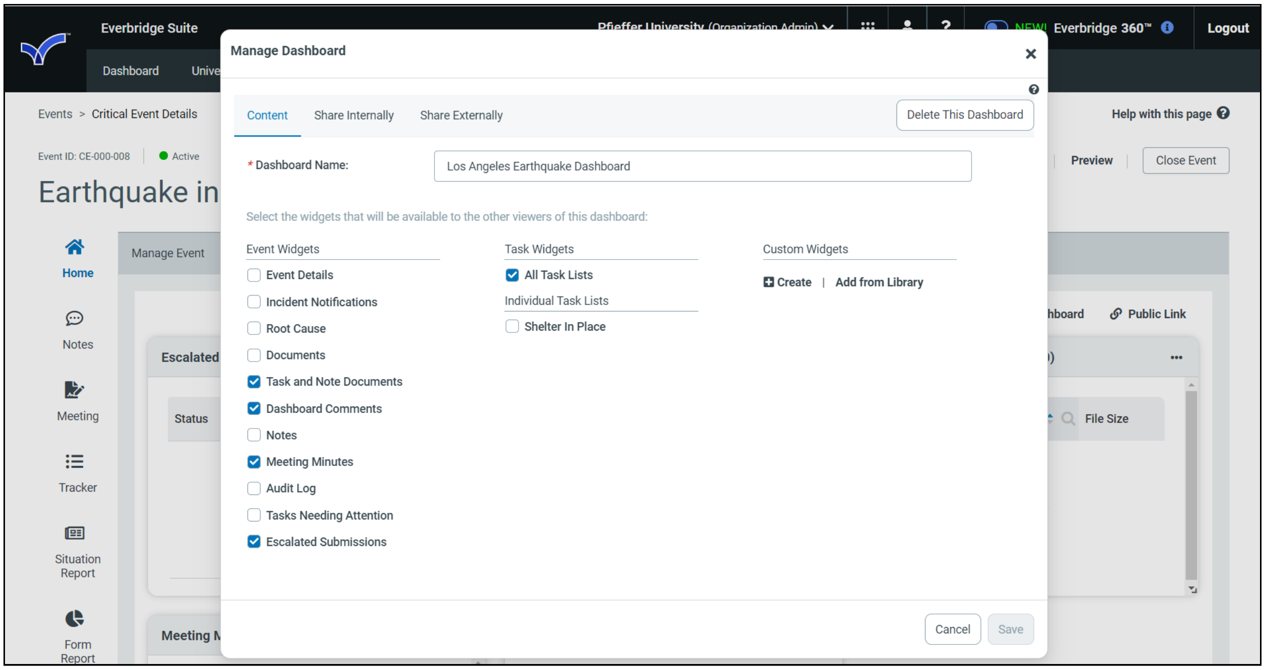


4. Click **Save**.
5. Look at the **Critical Event Template** to verify the **Dashboards** that have been added to the template.
6. From the **Critical Events** tab, click **Launch Critical Event**.
7. Select your Critical Event Template.
8. Select the **Dashboards View** checkbox. The dashboard names are displayed from the **View** link.

Managing Your Dashboard

Click **Manage Dashboard** to perform the following actions:

- **Content**
    - Rename the Dashboard.
    - Clear the checkbox next to an Event Widget name to make it unavailable on any dashboard in the Organization. If it is displayed anywhere, it will be removed.
    - Select the widgets that will be available to the viewers of this dashboard (including yourself). See Creating a Single Event Dashboard for details.
    - See the unlaunched Task Lists (they are disabled and you cannot select them), if any.
    - Create a Custom Widget. See Create a Custom Widget for details on creating a Custom Text widget or a Webpage widget.
    - Add a Custom Widget from the Widget Library. See Add a Custom Widget.
    - Add a Custom Widget from the Single Event Dashboard. From the Dashboard, you can add a Custom Text or Webpage widget, as well as a Tracker and Form Report widget. See Add a **Custom Widget from the Single Event Dashboard** below.
    - Delete the Dashboard. Confirm the deletion.
- **Share Internally**
    - **Public** - All users
    - **Private** - Organization Administrators and invited users can access the dashboard. You can select Roles and/or Users.
- **Share externally**
    - Select the contacts by Individuals, Groups, and/or Rules who are permitted to see this dashboard on the Member Portal.



NOTE: Only Account Administrators, Organization Administrators, and Incident Administrators can manage a dashboard.

Update a Dashboard

To update your dashboard:

1. Select the associated event in the **Active Events** section on the **Critical Events Dashboard**.
2. Click the name of the desired Single Event Dashboard.
3. From the **Actions** menu, click **Manage Dashboard**. The **Manage Dashboard** dialog appears.
4. Update your dashboard as needed.
5. Click **Save**.

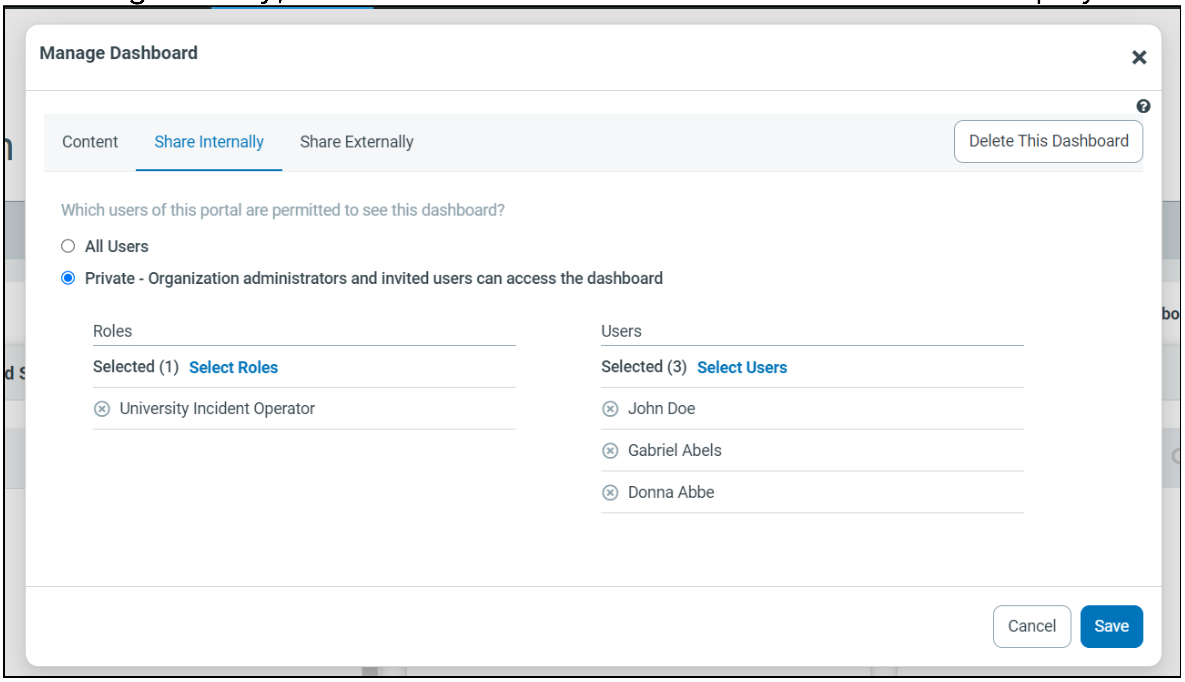
Preview Selected Contacts

To preview the contacts you selected for a Dashboard:

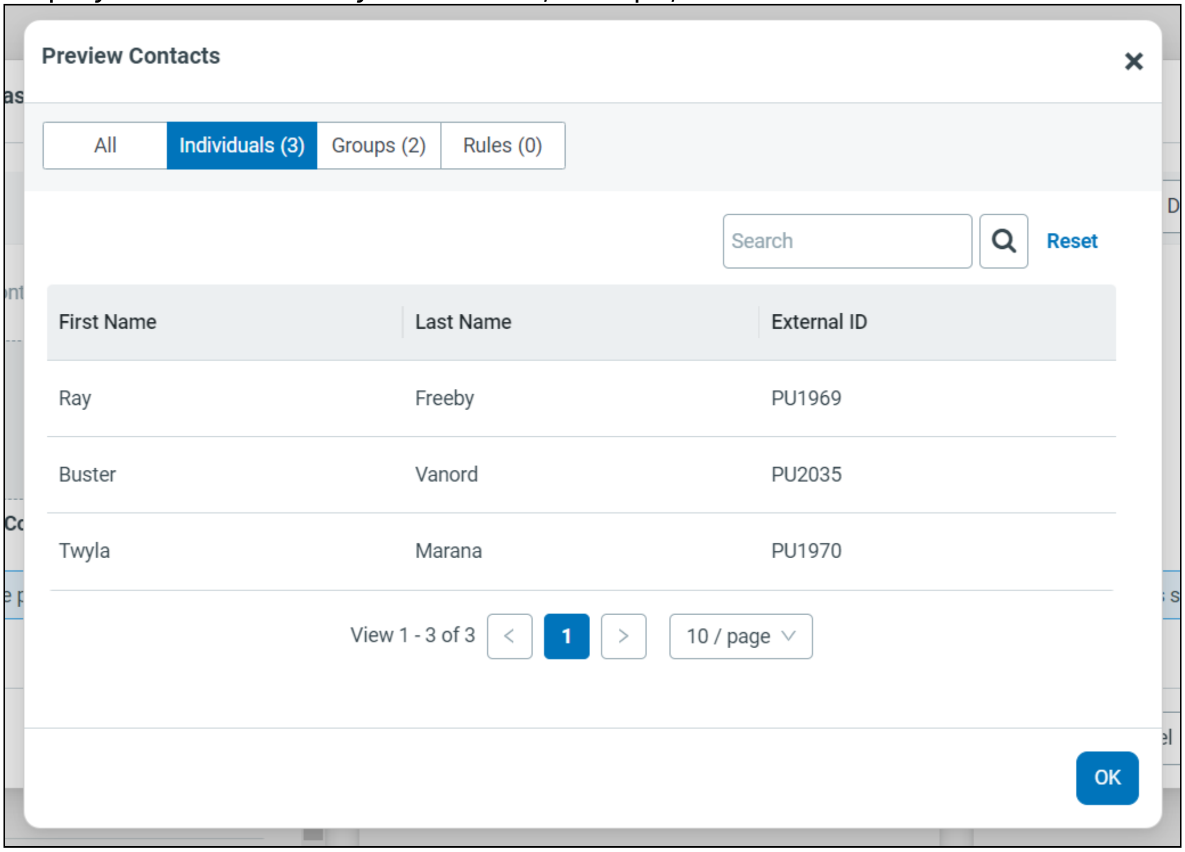
1. Select the relevant event in the **Active Events** section on the **Critical Events Dashboard**.
2. Click the name of the desired Single Event Dashboard.
3. From the **Actions** menu, select **Manage Dashboard**. The **Manage Dashboard** dialog appears.

- If you shared internally to a private portal, click **Share Internally** to see the roles and users.
- If you shared externally to contacts permitted to see the dashboard on the Member Portal, click **Share Externally**.

4. If Sharing Interally, the list of selected Roles and Contacts will be displayed.



5. If Sharing Externally, click **Preview Contacts**. The **Preview Contacts** dialog displays the contacts by Individuals, Groups, and Rules.



NOTE: Using the **Share Externally** option is required for recipients to access this Dashboard via the **Everbridge Mobile App**.

Share Externally with a Public Link

Dashboards can be shared externally by copying and sending a Public Link from either the overall Critical Events page or from the individual Event Details pages.

Select **Public Link** at either level depending on which you'd like to share. From there, you can either copy the Public Link or input the email addresses of up to 200 recipients. If the latter method is used, then an additional message (of up to 2,500 characters) can also be included.

Click **Send** to share the Dashboard with the specified contacts.

Save Dashboard as Default View

To save your dashboard as a default view:

1. From the **Critical Event Home** page, look at the Dashboard.
2. In the **Active Events** page, select the event you want to update.
3. Click the desired name of the single event dashboard.
4. From the Actions menu, click **Save as Default**. The **Default Layout saved successfully message** appears. Any new user to this dashboard will see this as the default view rather than a system-generated view.

Manage Widgets

To add or remove widgets from a Single Event Dashboard:

1. From the **Critical Event Details** page of an event, click **Dashboard**.
2. From the **Actions** menu, select **Manage Dashboard**.
3. The Manage Dashboard page appears, where you can choose to include the following widgets:
    - **Event Widgets**
        - Event Details
        - Incident Notifications
        - Root Cause
        - Documents
        - Task and Note Documents
        - Dashboard Comments
        - Notes
        - Audit Logs
        - Tasks Needing Attention
        - Escalated Submissions
    - **Task Widgets**
        - All Task Widgets
        - Individual Task Lists
    - Custom Widgets

Add a Custom Widget from the Single Event Dashboard

To add a custom widget from the Single Event Dashboard:

1. From the **Critical Event Details** page of an event, click **Dashboard**.
2. From the **Actions** menu, select **Manage Dashboard**.
3. Under the **Custom Widgets** column, click **Create**. The **Create a Widget** dialog is displayed.
4. From the **Widget Type** field, select one:
    - **Custom Text**
    - **Webpage**

- **Tracker**
- **Form Report**

5. If offered, select the **Add to Widget Library** checkbox.
6. In the **Title** field, enter a title for your widget.
7. Depending on the widget type you selected:
    - **Custom Text only:** In the body, type your text. You can use the formatting features offered from the button bar above the body message pane.
    - **Webpage only:** Enter an HTTPS URL.
        - If you enter an HTTP or HTTPS URL that contains the HTTP request, you might encounter security issues because you have secure (HTTPS) content mixed with insecure (HTTP) content.
        - You can also click **Preview** to see the webpage.
        - The webpage widget uses an iFrame, which is not supported by all websites.
    - **Tracker:** Search, if needed, then select the Tracker Name you want to use. Next, select **List** or **Chart** from the menu
    - **Form Report:** Select **New** or **Existing Form Reports**. **New** indicates that the form is from the Form Library and is empty, where you can fill it in. **Existing Form Reports** are already filled in.
8. Click **Save**. Your widget is automatically added to the **Critical Event Home** dashboard. Additionally, if you added the widget to the Widget Library, it will be listed there as well.

Managing Widgets (Incident Operator)

Incident Operators can manage widgets on a Dashboard by adding or removing different items to fit their needs.

Manage Widgets

To add or remove widgets:

1. From the **Critical Event Home** page, look at the **Dashboard**.
2. In the **Active Events** section, select the Critical Event you want to update.
3. Click the desired name of the Single Event Dashboard.
4. From the Actions menu, select **Manage Dashboard**. The **Manage Dashboard** dialog appears.
5. Update your widgets as needed.
    - Select the widgets that will be available to the viewers of this dashboard, including yourself.
    - Clear the checkboxes of the widgets you do not want on this dashboard.
6. Click **Save**.

Viewing Single Event Dashboards from the Member Portal

After the user receives the Single Event Dashboard link via email or SMS, the Member Portal login prompt appears.

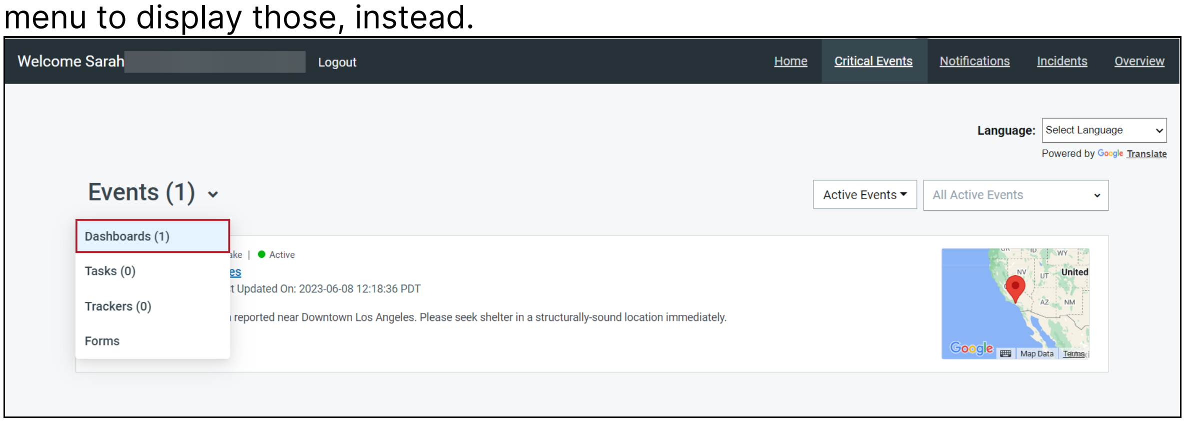
To view the Single Event Dashboard from the Member Portal:

1. Click the link to advance to the Member Portal and log in.
2. Once logged in, your Single Event Dashboard appears.
    - The Dashboard on the Member Portal is responsive. If the user views the Dashboard on a phone device, the layout is single-column-based.
3. In the **Notes** widget, optionally enter your note text in the text field.
4. Optionally, attach up to four files to the Note, which are not limited to images only.
5. Click **Back** to return to all the Single Event Dashboards.

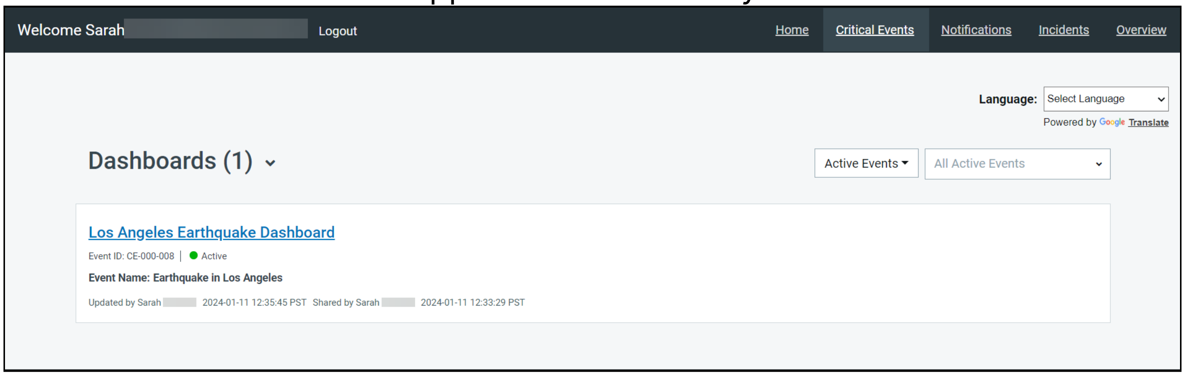
> **NOTE:** If configured, when a status change is made from a Mobile phone or the Member Portal, a real-time alert is shown in the Manager Portal. See Real-time Updates.

To view a Critical Event Dashboard in the Member Portal without using the provided link:

1. Log in to the Member Portal.
2. Click **Critical Events** in the top menu bar.
3. By default, Events will be displayed. Select **Dashboards** from the dropdown menu to display those, instead.



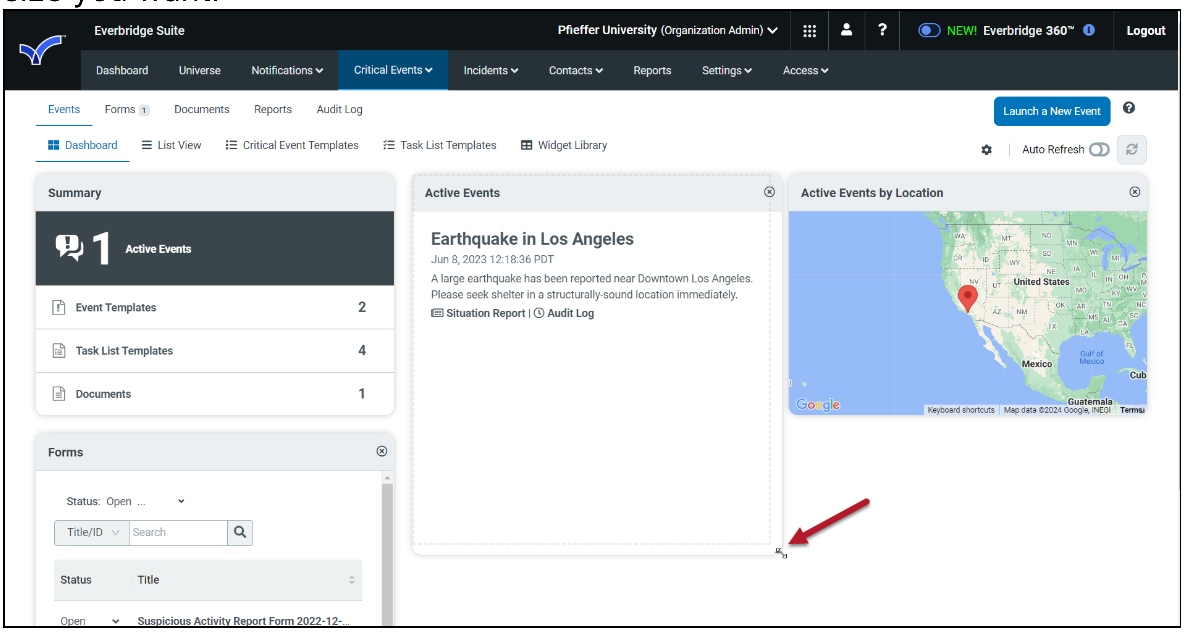
4. The list of Dashboards will appear. Click the one you want to view.



Resizing the Dashboard Panes

To resize the Dashboard panes:

1. Move the panes on the Dashboard by selecting the title and dragging the pane to the desired location.
2. Hover the mouse in the lower right-hand corner of a pane and drag it to the size you want.



3. Release the mouse.

Viewing Single Event Dashboards from the Member Portal

After the user receives the Single Event Dashboard link via email or SMS, the Member Portal login prompt appears.

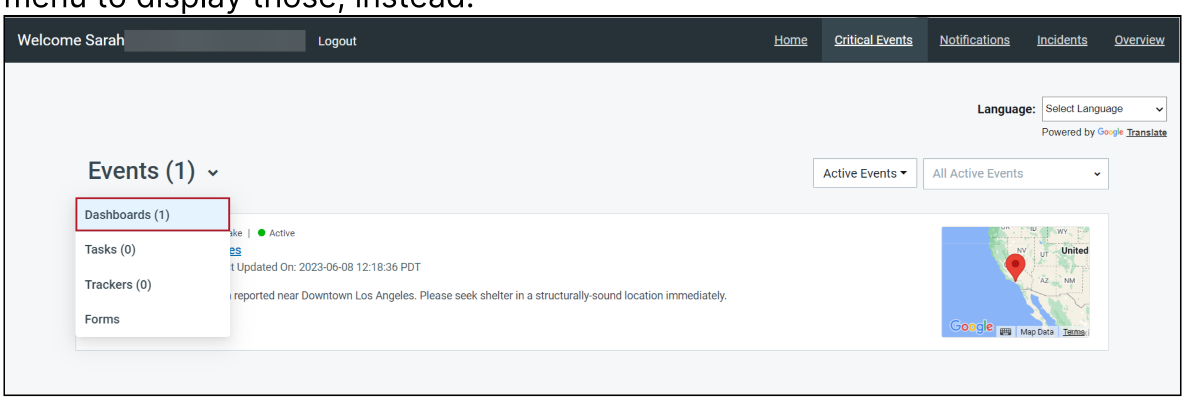
To view the Single Event Dashboard from the Member Portal:

1. Click the link to advance to the Member Portal and log in.
2. Once logged in, your Single Event Dashboard appears.
    - The Dashboard on the Member Portal is responsive. If the user views the Dashboard on a phone device, the layout is single-column-based.
3. In the **Notes** widget, optionally enter your note text in the text field.
4. Optionally, attach up to four files to the Note, which are not limited to images only.
5. Click **Back** to return to all the Single Event Dashboards.

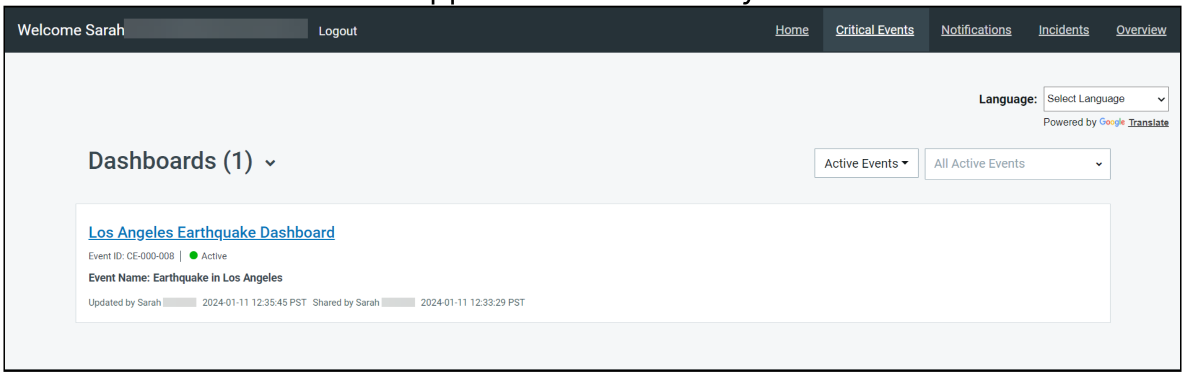
> **NOTE:** If configured, when a status change is made from a Mobile phone or the Member Portal, a real-time alert is shown in the Manager Portal. See Real-time Updates.

To view a Critical Event Dashboard in the Member Portal without using the provided link:

1. Log in to the Member Portal.
2. Click **Critical Events** in the top menu bar.
3. By default, Events will be displayed. Select **Dashboards** from the dropdown menu to display those, instead.



4. The list of Dashboards will appear. Click the one you want to view.

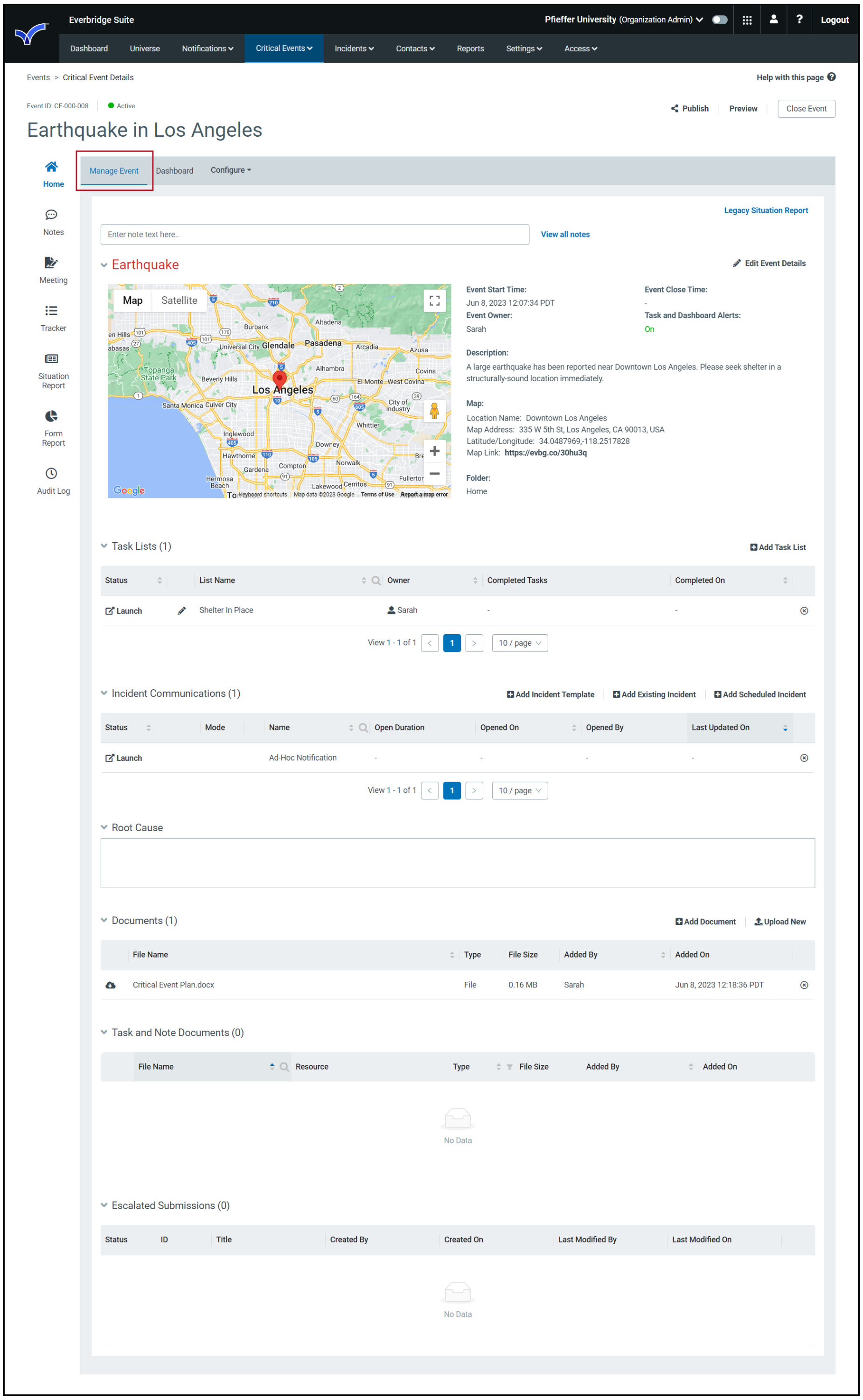


Managing a Live Critical Event

View Critical Event

To see details of an event:

1. From the **Dashboard**, double-click an Active Event, or from the **List** page, click the desired Critical Event Title. The corresponding **Critical Event Details** page appears.
2. From there, you should land on **Manage Event**, where you can review crucial details about this Critical Event.



The following details can be found on this page:

Field	Description
Upper left-hand corner	Critical Event Title Status: **Active** or **Closed**

Publish I Preview	Click the **Publish** link to select contacts (Individuals, Groups, and Rules) who are permitted to see this event landing page in the Member Portal in read-only mode. Then click the Publish button. Click **Preview** to see the selected contacts. To publish multiple events, from the List View of the Critical Event, select the checkboxes of the desired events, select the Actions menu, and select **Publish to Contacts**. (To stop publishing, select **Unpublish**.)
Close Event	Click to close the Active event.
Notes	Click the **Notes** icon. You can enter note text here. You can attach up to four files to the note, which are not limited to images only. You can see each note at the bottom of the page. You see the name of the person who wrote the note, the date and time, and the note text.
Meeting	Click the **Meeting** icon to open a text field where meeting minutes can be left. Meeting templates can also be created here to use later.
Situation Report	Click the **Situation Report** icon. You can add an Executive Summary. Then, click **Preview** to see the Situation Report in a document format, which you can export to PDF. See Managing the Situation Report.
Form Report	Click the Form Report icon to see the Form Reports for a Critical Event.
Audit Log	Click the **Audit Log** icon to generate the audit log. When done, click **Export**. Click the link in the email and the Audit Log appears in CSV format. See Viewing the Event Audit Log. **NOTE:** If two or more email addresses are indicated as delivery methods for a user, only the one higher in the Delivery Method sequence is used.
Assets	Click the **Assets** icon to view the affected assets and contacts. Select the Assets and/or Contacts checkbox to

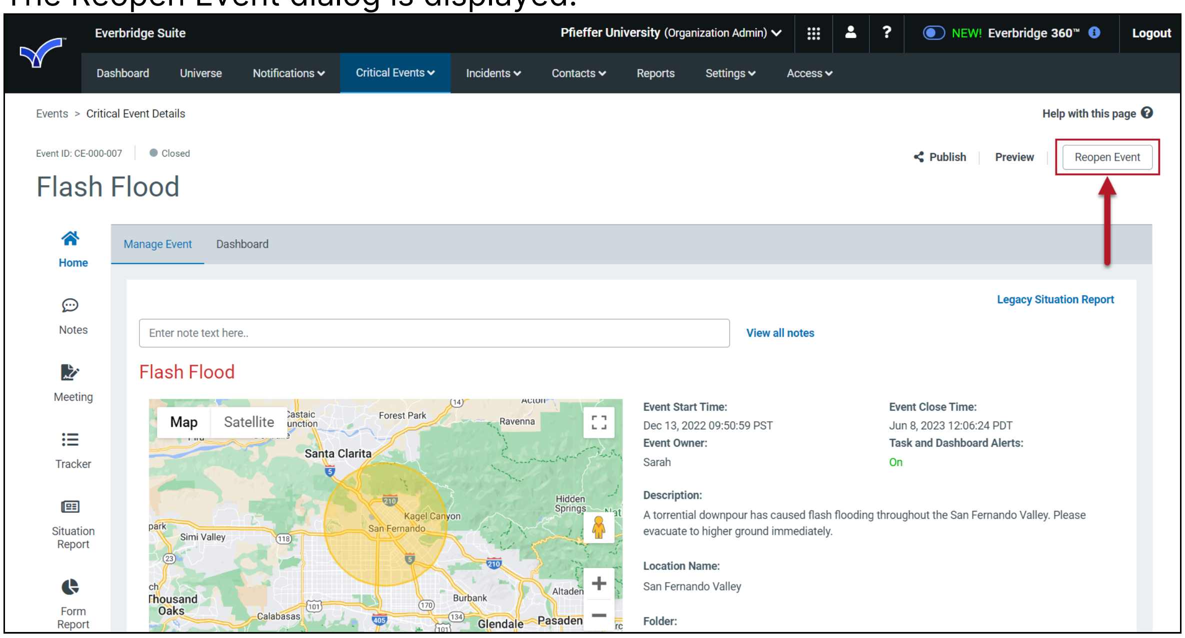
	enable drill-down for active events in Member Portal. Otherwise, the Data Views are read-only. See the Data Views of any asset or contacts by clicking the data view name (it is a link). A user of the Member Portal can drill down only on the created Data Views. From the right-hand pane, select an item where you can download a CSV file. From the left-hand pane, you can download multiple Asset Types (or Contact Record Types) into a zip folder. Each type contains different column headings, so each type is an individual CSV file in the zip folder. When an individual Asset Type or Contact Record Type displays zero (0), no CSV file is created. To create a new data view, click **Add Item**. Enter a name for the data view, select the group (Assets or Contacts) from the drop-down list, then select your Asset Type or Contact Record Type.
Event Details	View or edit the event details: • Event Start Time • Event Close Time • Event Owner • Description • Map • Folder
Task Lists (*N*)	(*N*) represents the number of task lists in the Critical Event. You can see the task lists associated with this Critical Event. You can add more task lists and launch unlaunched task lists. You can also delete task lists from the Critical Event **Details** page. For details, see **Manage Task Lists in Critical Event Details** below.
Incident Communications (*N*)	(*N*) represents the number of Incident Templates in the Critical Event. You can see the Incident Templates associated with this Critical Event. You can add more Incident templates, add existing Incidents, launch unlaunched Incidents, schedule unlaunched Incidents, and add scheduled Incidents. You can even delete Incident templates from the **Critical Event Details** page.
Root Cause	A data field that identifies the **Root Cause** of a Critical Event. It's shareable via the Dashboard.
Documents (*N*)	(*N*) represents the number of documents in the Document Library. You can see the Documents associated with this Critical Event. You can add more documents, download

	existing documents, and upload additional documents. You can also remove documents from the **Critical Event Details** page.
Task and Note Documents (*N*)	(N) represents the number of documents in the document depository. All of the documents are in one place.
Linked Contents (*N*)	(*N*) represents the number of linked content to the Critical Event such as escalated requests.
Notes (*N*)	(*N*) represents the number of notes in the Critical Event. Depending on the notes added to this Critical Event, you can see each of them by clicking the Notes tab in the left-hand pane.

Close or Reopen a Critical Event

To close or reopen a Critical Event:

1. From the **Critical Event Details** page of an event, click **Close Event**. The Close Event dialog is displayed.
2. Click **Close Event** again to confirm.
3. From the Critical Event Details page of a closed event, click **Reopen Event**. The Reopen Event dialog is displayed.



4. Click **Reopen Event** again to confirm. All previously shutdown elements such as Task Lists, Incidents, notes, and documents are reactivated.

Searching for an Event

You can search for events by keywords, save the filters, and download event details to a CSV file.

<u>To search for an event by keyword:</u>

1. From the **Event Home Page**, select the **List view**.
2. In the **Search** field, type your keyword for the desired event using Event Title, Event Type, Description, Location Name, or Custom Fields.
3. Click the **Search** icon. (Leave the search filter as-is if you want to save the filter and/or download to CSV.)

To save your search filter:

1. Select the Cogwheel icon to the right of the Search field. The Manage Filters menu appears.
2. Click **Save Current Filter**.
3. Type a filter name.
4. Click **Save**. The filter is saved only for you.

NOTE: The maximum number of saved filters is 200 per user.

To download your event to CSV:

1. Select the Download icon (the "X") to the right of the Search field. The Download CSV message appears.
2. Click OK so you can continue working while waiting for an email Notification.
3. When you receive the Crisis Event Download email, click the link to open the CSV file.

Manage Incident Communications in Critical Event Details

From the Critical Event Details page of an event, you can add one or more Incident communication templates, and launch Incident templates.

To add an Incident template to an event:

1. From an event's **Critical Event Details** page, click **Add Incident Template**. The **Add Incident Template** dialog displays the Incident templates.
2. Select the matching Template Category on the left-hand side of the dialog.

3. Select one or more of the desired Incident template names from the list of existing templates on the right-hand side of the dialog.
4. Click **Add Selected Templates**. The selected Incident templates are added.

Launch Incident Template

To launch an Incident template for an event

1. From an event's **Critical Event Details** page, click **Launch** from the Incident Template you want to send. The **Launch Incident** page appears.
2. Enter details for step 1 of 2 and click **Next**.
3. Enter and verify your Incident Review information.
4. Click **Send**.

Schedule an Incident

To schedule an Incident for an event:

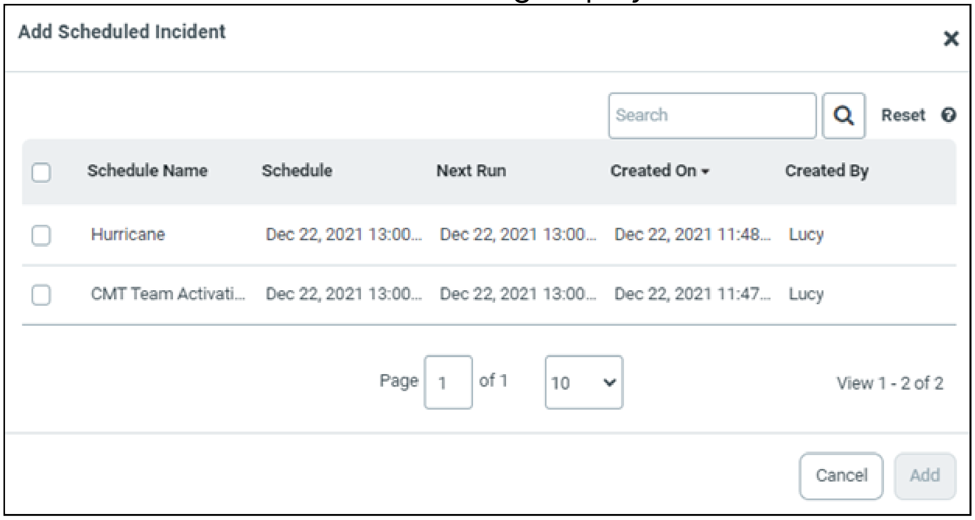
1. From an event's **Critical Event Details** page, click **Launch** from the Incident Template you want to schedule. The **Launch Incident** page appears.
2. Enter details for step 1 of 2 and click **Next**.
3. Enter and verify your Incident Review information, then click **Schedule**. The scheduled Notification will use the values as set now. Any change made to the template later will not apply.
4. Enter the following:
    - **Schedule Name** — Change the name of the Incident as needed.
    - **Date** — click the Calendar icon and select the date you want to schedule the Incident.
    - **Send time** — click the Calendar icon and enter the Hour and Minutes.
5. Optionally, select the **Close Incident after successful send** checkbox.
6. Click **Schedule**. In the **Critical Event Details** page, you can see that the Incident is scheduled.

Add a Scheduled Incident

If you already have scheduled Incidents, you can add them directly from the **Critical Event Details** page.

To add a scheduled Incident to an event:

1. From an event's **Critical Event Details** page, click **Add Scheduled Incident**. The **Add Scheduled Incident** dialog displays the Incident.



2. Select the checkboxes of the desired Incidents.
3. Click **Add**. The scheduled Incident(s) are added to the Critical Event Details page.

Add Existing Incident

To add an existing Incident to an event

1. From an event's Critical Event Details page, click **Add Existing Incident**. The **Add Existing Incident** dialog displays the Incidents.
2. Select the checkboxes of the desired Incidents.
3. Click **Add Selected Incidents**. The Incidents are added to the **Critical Event Details** page.
4. From the **Action** menu, select the type of action you want:
   - Update
   - Close With Notification
   - Close Without Notification

Documents in Critical Event Details

Besides downloading documents from the **Documents** (*nn*) pane, you can add existing documents from the Document Library, and upload new documents to the Document Library. Common file formats include the following, with a maximum file size of 50 MB:

- Document formats such as docx, pdf, xlsx, and cvs.
- Presentation formats such as pptx.
- Media formats for images, audio, and video such as png, mp3, and mp4.
- Other file formats such as ics (calendar).

Add an existing document

To add an existing document:

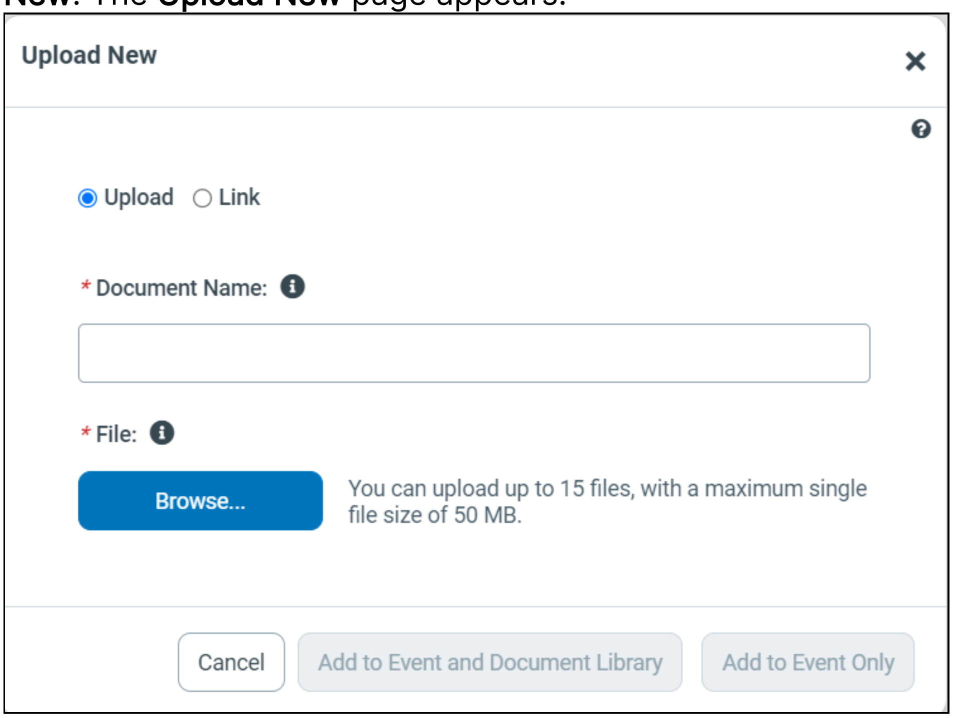
TIP: You can add an existing document from an event's Critical Event Details page, or when you launch a new event, create an event template, or create a task.

1. From the **Documents** section or pane, click **Add Document**. The **Add Document** dialog appears.
2. Select one or more desired documents from the existing documents.
    - To select multiple documents, select a checkbox of the first desired document, then hold down **CTRL** and select the other checkboxes you want.
3. Click **Add Selected Documents**.

Upload a new Document

To upload a new document to the **Critical Events Details** page:

1. From the **Critical Events Details** page, in the **Documents** section, click **Upload New**. The **Upload New** page appears.



2. Do one of the following:
    - Click **Upload**, enter a Document Name, and Browse to the file. You can upload up to 15 files. The maximum single file size is 50 MB.

- Click **Link**, enter a Document Name, and enter the URL. Make sure to precede your website address with the `https` protocol.

3. Click the Information icon next to the File label to see the currently-supported file formats.
4. Click either **Add to Event** and **Document Library** or **Add to Event Only**.
5. Click **Done**.

> **NOTE:** To add the document to the Document Library, repeat steps 1 through 3 above, click either **Add to Event Only** or **Add to Event** and **Document Library**, then click **Done**.

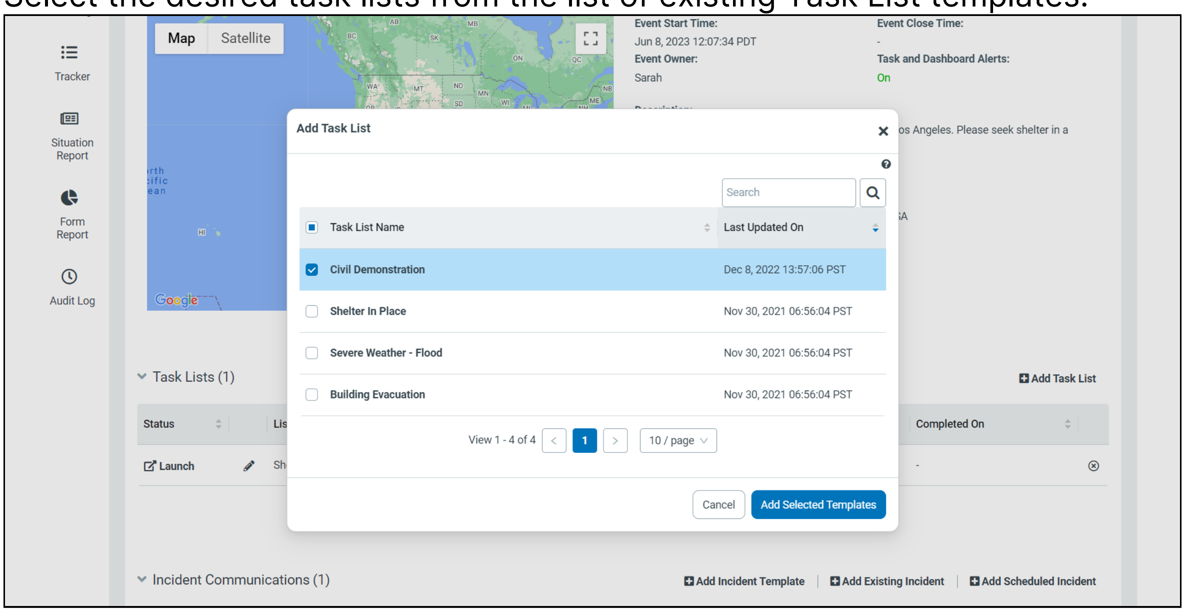
Manage Task Lists in Critical Event Details

From the Critical Event Details page of an event, you can add one or more Task Lists, edit existing task lists, and launch task lists.

Add a Task List to an Event

To add a task list to an event:

1. From an event's **Critical Event Details** page, click **Add Task List**. The **Add Task List** dialog appears.
2. Select the desired task lists from the list of existing Task List templates.



3. Click **Add Selected Templates**. The task list(s) is added.

View Critical Event Task List Details

To view the Task List Details of a Critical Event:

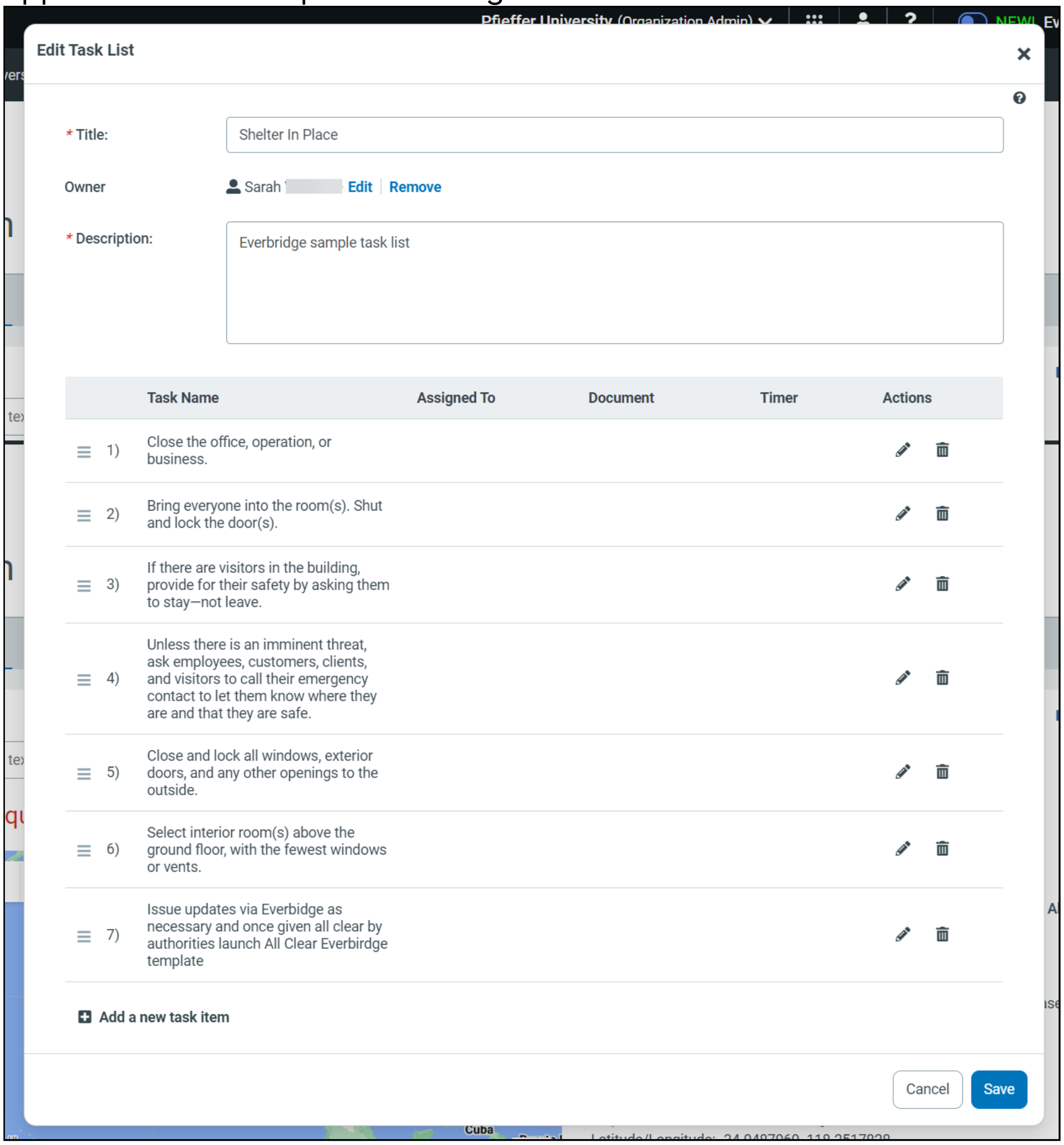
1. From an event's **Critical Event Details** page, click the name of a task from the **Task Lists** pane.
   - You can only select the **Task List Details** if the task has been launched.
2. Edit the following fields:
   - Change the Owner. Click **Edit** and select a different owner.
   - Change the Status. Select from the menu.
   - From the **Actions** menu, you can:
     - Add a Comment to add notes to the task.
     - View and Edit Task Details.
       - If the Status of a task is **Done**, you can view the task details.
       - If the Status of a task is not **Done**, you can edit the task details.
     - Set Timer, where you can set the Timer Type (Relative or Date), enter how much time the task must be completed within (up to 530 Hours and 59 Minutes), and Escalate to the Task List Owner or a Custom Selection, as well as turn off the timer Notification.
     - Remove Timer altogether if the Timer has been set.
     - Delete a task if the task's status is **Not Started**.
   - If used, click Show (*nn*) Comments, where *nn* is the number of comments. Alternatively, click the link Expand Comments. Conversely, click either Hide (*nn*) Comments or Collapse Comments.
   - If available, click the Download icon to download a document.
   - Click **Manage Columns** to add or remove custom columns.
     - **Status**, **Task Name**, **Comments**, and **Documents** are always displayed.
   - Click **New Task** to add another task to the task list. For details, see the procedure **Edit a Task List From the Critical Event Details**, next.
     - If **Auto Refresh** is turned on, you <u>cannot</u> change the task status or add comments.
3. Prioritize the task items in the list.
   - Move each task up or down based on its importance.
   - Sort the task items in a list by the column header. Sorting does not change the priority order of the tasks.

Edit Task List from Critical Event Details

To edit a task list from the Critical Event Details:

1. From the **Critical Events tab**, select **Task List Templates**.

2. Click the Pencil icon of the task list you want to edit. The **Edit Task List** dialog appears. You can replace existing values and add additional tasks.



3. Modify the task list as needed. (See the following procedures.)

Update Task List Title

To update the Task List Title or Description:

1. Select the text you want to replace.
2. Type the updated text.
3. When you are done with all changes, click **Save**.

Select an Owner

To select an Owner:

1. Click **Edit** next to the owner's name you want to change. The **Select an Owner** dialog appears.
2. Select the new owner by Individual, Group, or Rule.
    - **By Individual**—When you change the name of the individual owner, both the original owner and the new owner are sent a Task Assignment Alert via SMS or email about the reassignment.
    - **By Group**—When you change the name of the owner to a group, both the original owner and contacts comprising the new group are sent a Task Assignment Alert via SMS or email about the reassignment.
    - **By Rule**—When you change the name of the owner to a rule, both the original owner and the contacts comprising the rule are sent a Task Assignment Alert via SMS or email about the reassignment.
3. Click one of the following:
    - **Select** — select the individual owner.
    - **Multiple Tasks** — assign the selected person to all tasks selected in the Assign to Multiple Tasks dialog and click **OK**.
4. When you are done with all changes, click **Save**. The save will trigger a task assignment alert.

Update Task Owner

To update the owner of a task:

From the **Task List Details**, click **Edit** next to the Owner field. The **Select an Owner** dialog appears.

Select the updated owner and click **Select**.

Remove Owner from Task

To remove an owner's name from a task:

1. Select **Remove** next to the owner's name you no longer need. The Select an owner link appears. A Task Assignment Alert is sent to the removed owner via SMS and/or email.
2. When you are done with all changes, click **Save**.

Add Document to Task

To add a Document to a task:

1. Click **Add a file** next to the task you want to modify. The Add Document dialog appears.
2. Select a document from the Document Library.
3. Click **Add Selected Documents**.

Delete a Task

To delete a task from the Task List:

1. Click the **X** in the row of the task that you want to be removed. The task is immediately removed.
2. When you are done with all changes, click **Save**.

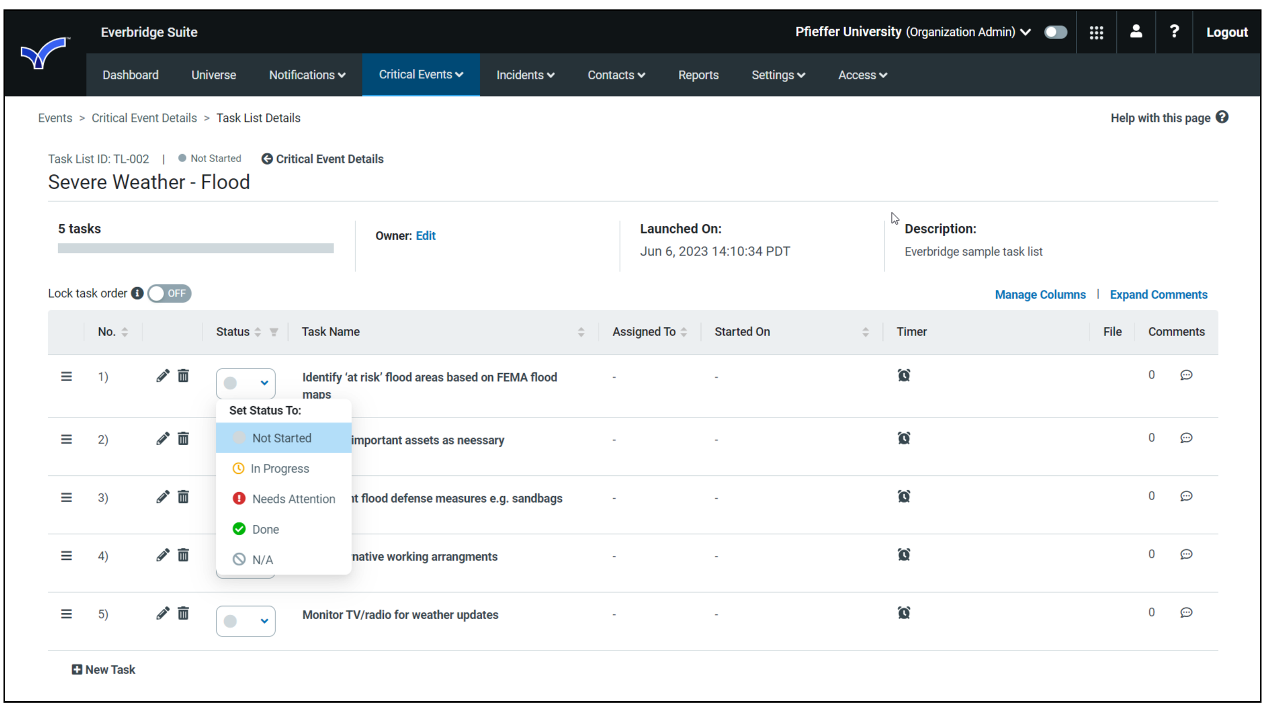
Create a Task Timer

To create a Task Timer:

- Click on the **Timer Icon** on the desired task within the Task List. The **Set Timer** popup will appear.
- Set the **timer duration.**
- Set the escalation point of **contact**. This person will be alerted if the task isn't completed before the timer expires.
- Click **Save**.

Updating Task Lists from the Manager Portal

Incident Administrators and Incident Operators of each task can update their task lists from the Manager Portal.



To launch a task list from the Critical Event Details:

1. Click **Launch** in the row of the desired task list. The **Launch Task List** dialog appears. A link will be emailed to the following individuals or groups:

- Task list owner
- Individual owners of each task

2. Click **Launch Task List** when you are certain you want to continue.
    - On the **Critical Event Details** page, the number of tasks completed of the total tasks comprised in the task list appears.
        - For example, **Completed Tasks: 0 of 7** indicates no tasks of seven have been completed.
3. The Task List owner and individual owners of each task are notified via email.
    - **Task List Owners**—Task List Owners see all tasks in the Task List.
    - **Task List Assignees**—Task List Assignees see only the tasks to which they are assigned. The other tasks are grayed out. Task List Assignees are individuals, all contacts in a group, or all contacts in the rule.
4. In the email that the owners receive, there are two links. perform the actions below for each link.
    - **Please click here to acknowledge receipt of this message**—In SMS, reply YES to confirm receipt. In email, click the link to acknowledge receipt.
    - **Click here for more information on this alert**—In SMS, tap the link provided in the text message. In email, click the link and the contact's Task List appears in their Task List page of the Member Portal after logging in. In SMS, tap the link and the contact's Task List appears in their Task List page of the Member Portal after logging in.
5. Proceed to the **Updating Task Lists from the Member Portal** section below.

Updating Task Lists from the Member Portal

Assignees of each task can update their task status from the Member Portal. When a task is launched, the contacts receive an assignment email or SMS message. When they click the link for more information, the details appear from their Member Portal. The task details page has been designed to be responsive so that it will fit into the smaller mobile screen.

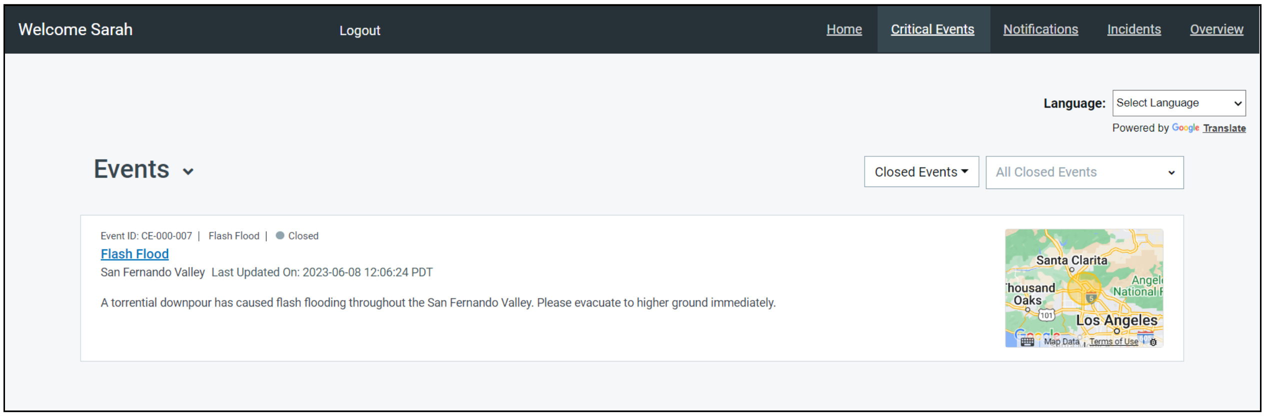
To update Task Lists from the Member Portal:

1. From a task, select the drop-down arrow to set the status:
    1. **Not Started**
    2. **In Progress**
    3. **Needs Attention** — A comment is required (up to 5,000 characters and four files).
    4. **Done**
    5. **N/A** — Indicates that the task isn't applicable.
2. If a task has a document, click the **Download** icon.

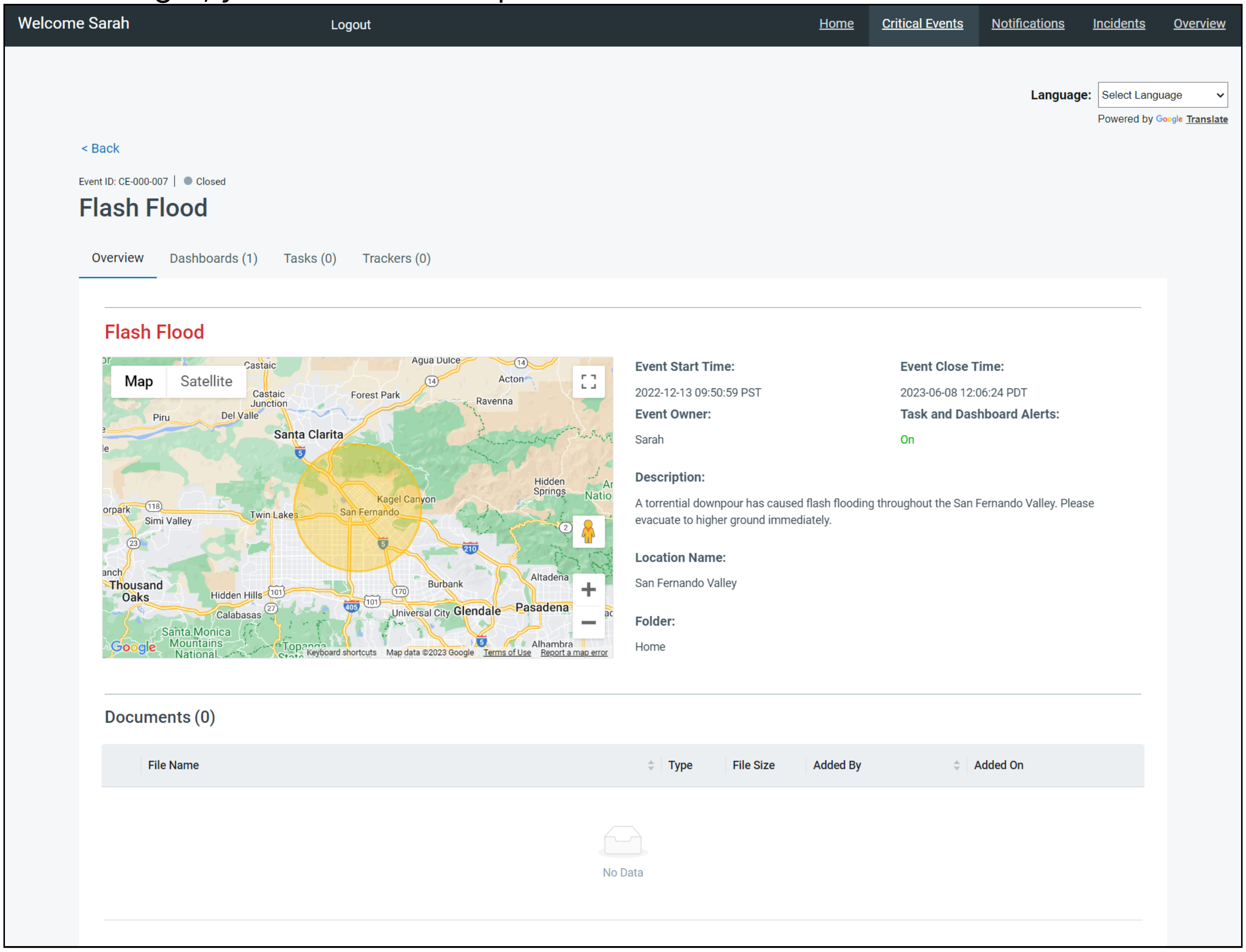
3. Click the **Comment** icon to add note text of up to 5,000 characters. Click **Add Comment** when done. After clicking the Comment icon, you can also add up to four files, one at a time.
    - The task status number in the Completed box changes if a task is Done.
    - If needed, users can delete or edit their own Comments, while Administrators can also edit those left by others.
4. Click **Back** when you are done. A list of tasks and the status of each task are displayed under **My Tasks**.
5. Select the other subtabs to see the lists of tasks under them:
    - **Not Started**
    - **In progress**
    - **Needs Attention** — A comment is required (up to 5,000 characters and four files).
    - **Done**
6. From the menu, select the desired status for any of the tasks.
7. Download any document by clicking its **Download** icon.
8. Logout when you are done.

Viewing the Dashboard Events from the Member Portal

You can see any Dashboard events that have been shared with you from the Member Portal. Select **Critical Events** from the menu bar at the top of the page. Then, from the **View menu**, you can search for a specific event or select a recent Critical Event.



After clicking the desired Dashboard name, you can view its widgets. If there is a **Notes** widget, you can add text up to four files.



Real-time Updates

To see a **Real-Time Banner**, make sure to configure the settings in Update Alerts. When a status change is made from a Mobile phone or the Member Portal, a real-time alert is shown in the Manager Portal. The alert is active for seven seconds.

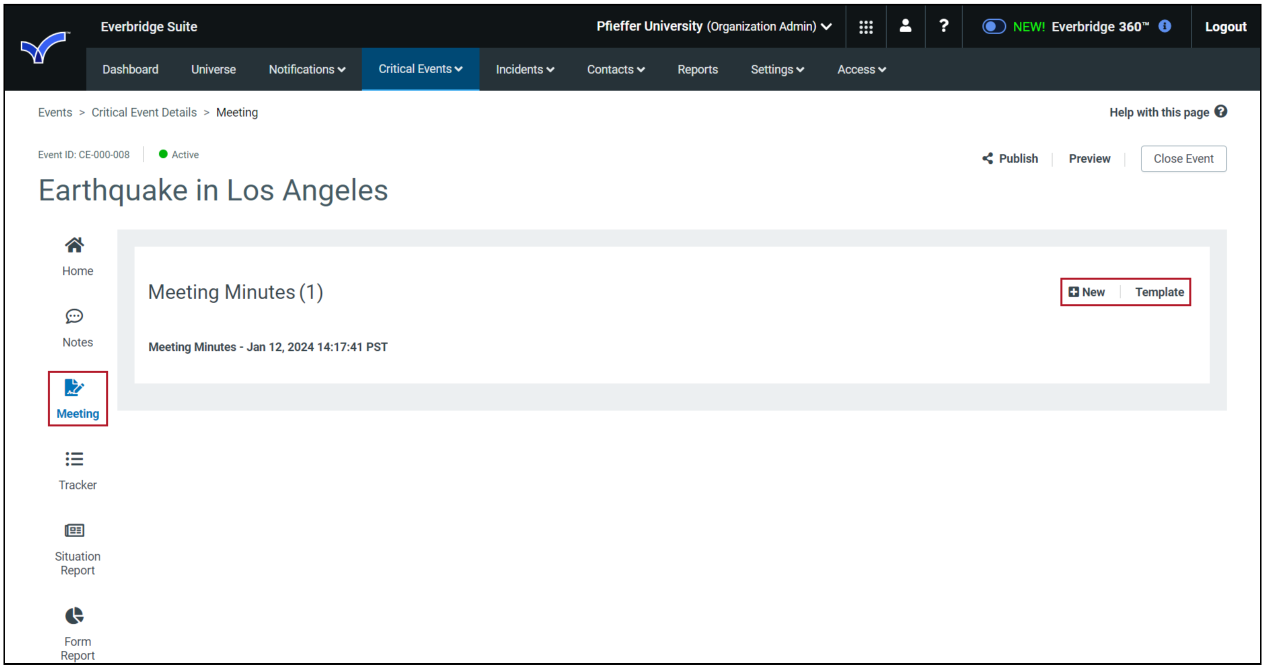
If an Administrator makes a status change and a second Administrator is viewing the same Critical Event Detail, Dashboard page, or Task List Details, that second Administrator sees the Real-Time Banner.

Critical Event Meetings

Meeting Minutes can be added from the **Critical Event Details** page by clicking on the **Meetings** icon in the menu bar to the left. Any preexisting Meeting Minutes can be located here in the list view.

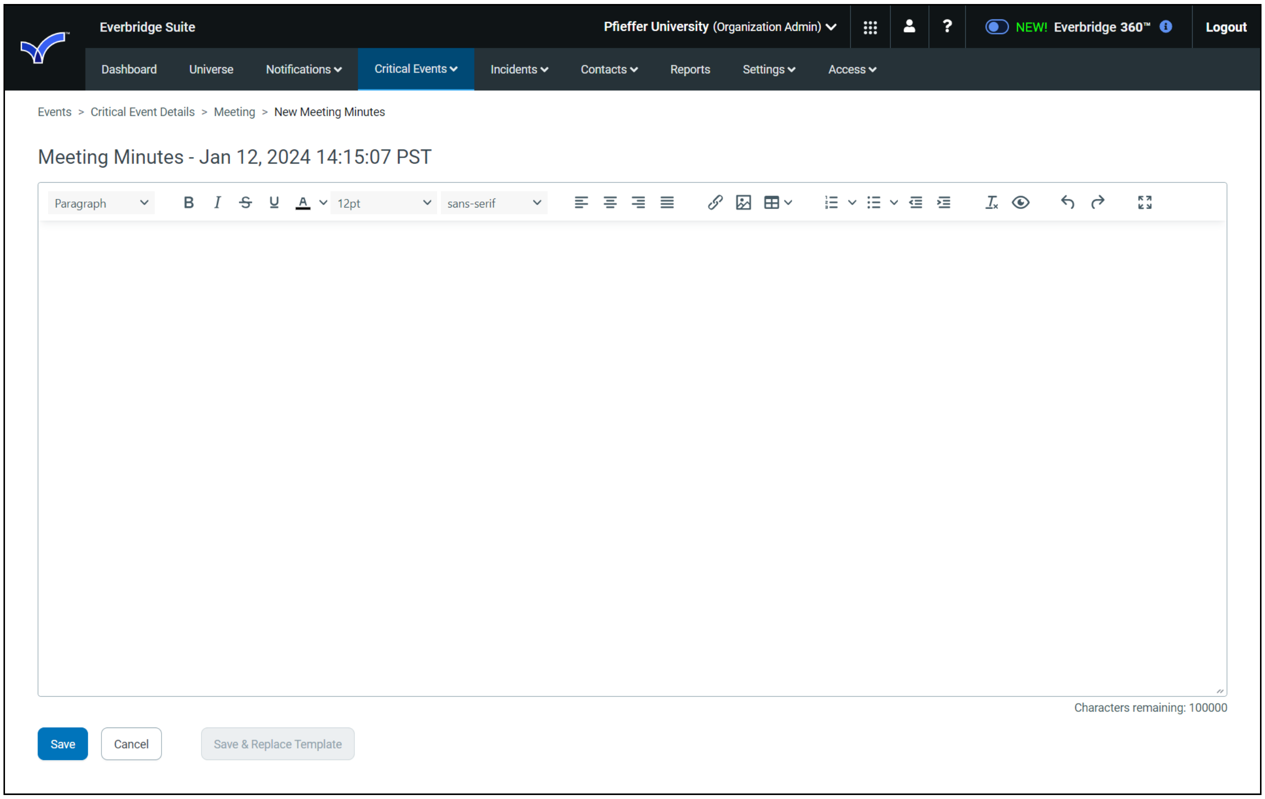
Creating Meeting Minutes

Click **New** to create new Meeting Minutes from scratch, or **Template** to create Meeting Minutes from a template.



Clicking **New** will open the text editor, which includes rich-text options to customize the Meeting Minutes' appearance or content, such as adding hyperlinks, images, tables, fonts, and style formatting.

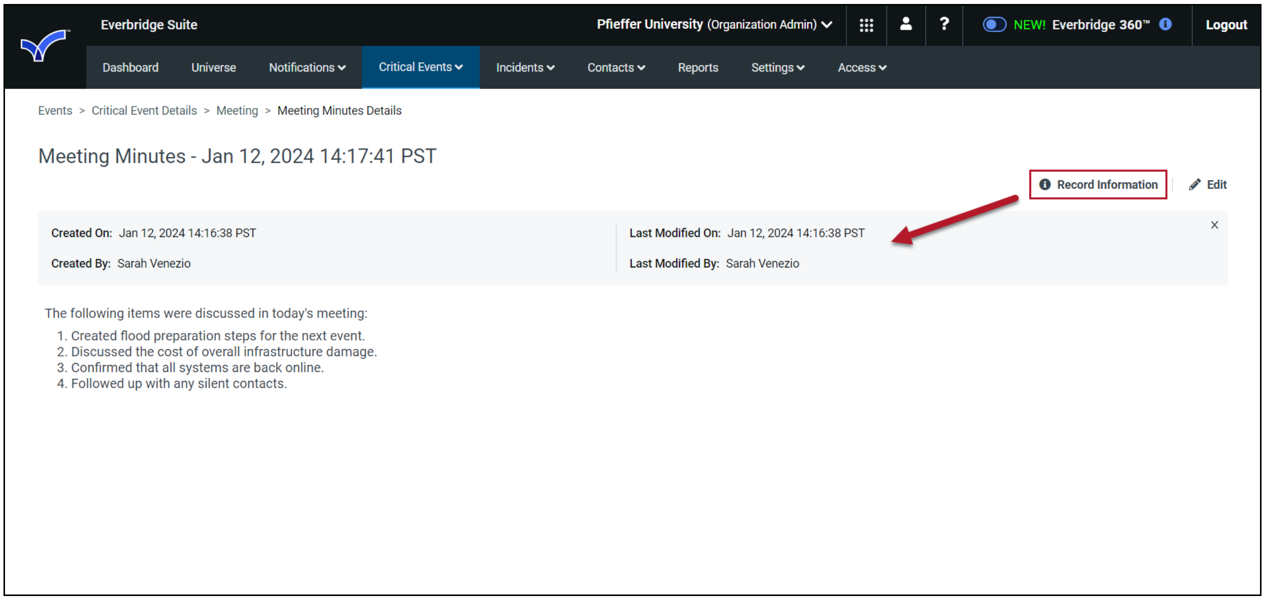
If Template was selected, the template contents will pre-populate in the text editor.



Click **Save** to retain the minutes and add them to the list while clicking **Save & Replace Template** will replace the current template with the submitted text.

Select the new Meeting Minutes from the list to view the **Meeting Notes Details** page. Clicking **Record Information** will display the following information:

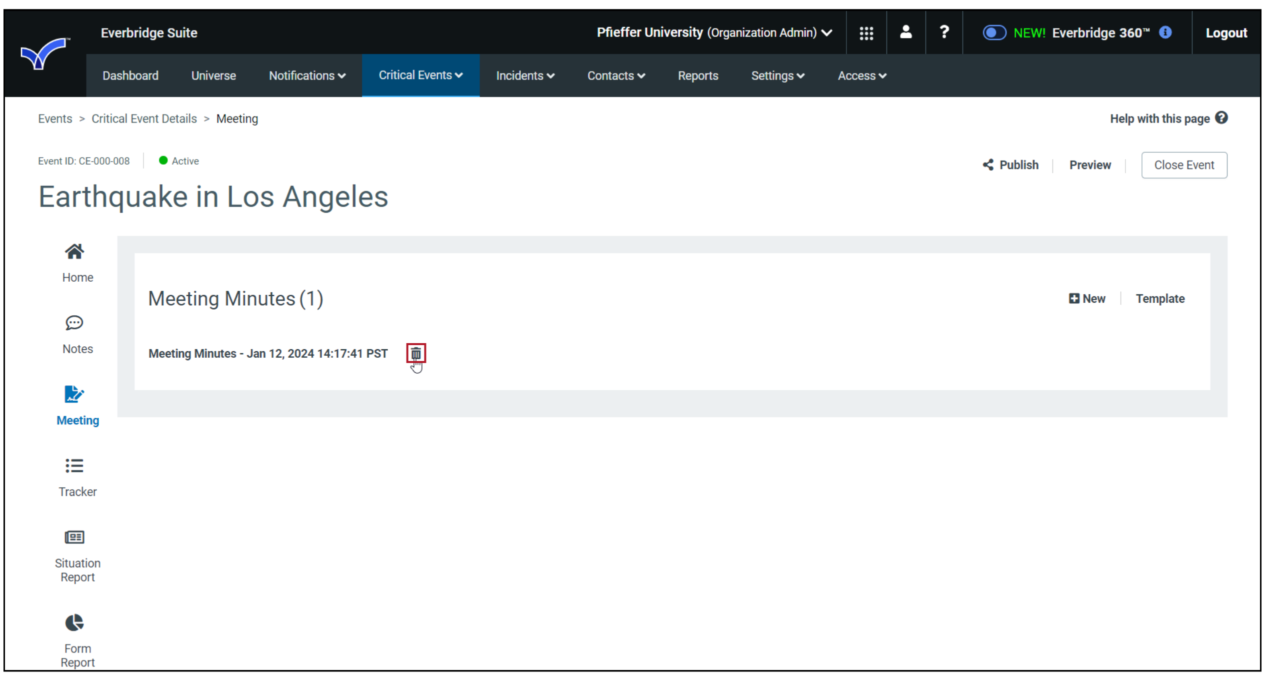
- Created On
- Created By
- Last Modified On
- Last Modified By



Click the **Edit** button to reenter the text editor and adjust the content as needed.

Deleting Meeting Minutes

Meeting Minutes can be deleted by hovering your cursor over the Minutes in question and clicking the **trashcan** icon once it appears.

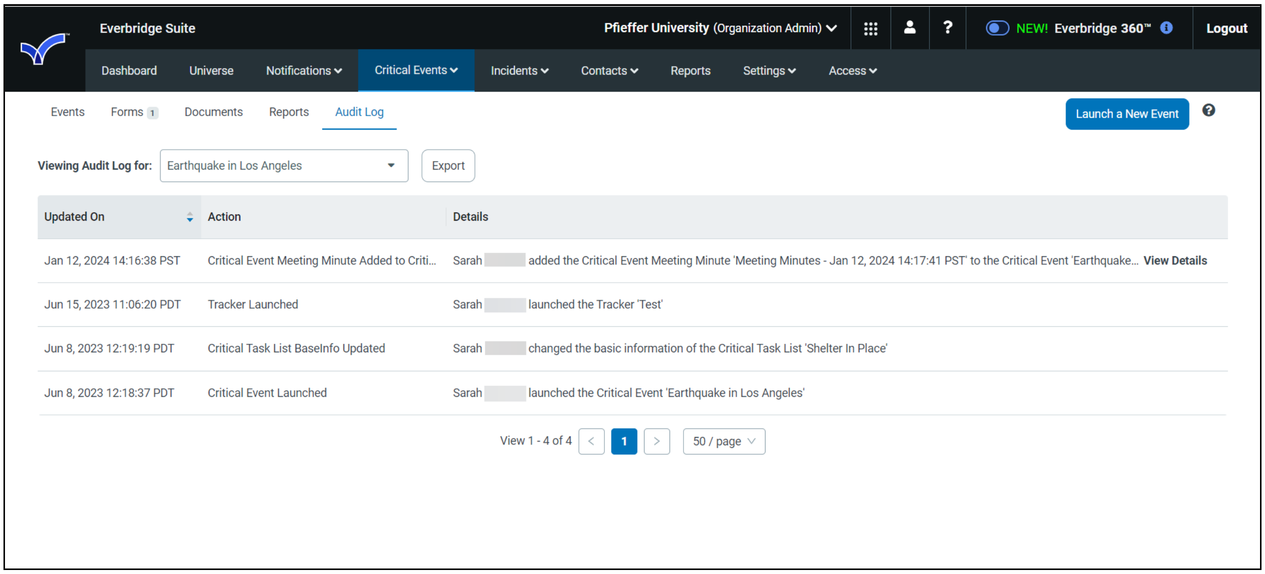


Click **Delete** in the confirmation prompt to delete the Meeting Minutes.

Viewing the Event Audit Log

From the **Audit Log** tab, you can view a log for a specific Event. The top-most audit log is the default.

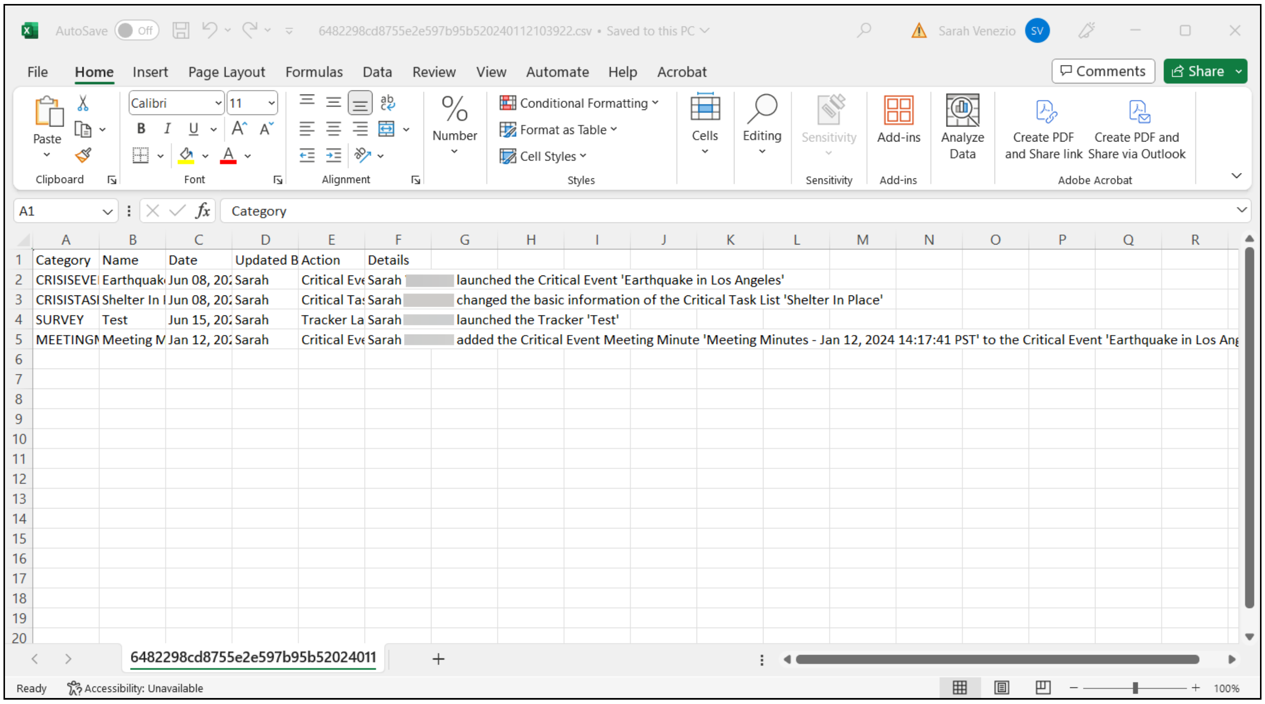
You can select the event you want to view from the menu.



The Audit Log of an event can be exported. From the **Audit Log** tab, select the event. Or, from the **Critical Event Details** of an event, click the **Audit Log** icon. Then click **Export** to generate the audit log.

Click **View Details** to see the Task Comments, Notes, and Critical Event details. You will see any attachments to the Notes.

The system is designed to accommodate large amounts of data so it will not directly download. When the file is generated, you are notified via email. Click the link in the email and the Audit Log appears in CSV format.



Category	Name	Date	Updated B	Action	Details
CRISISEVE	Earthquak	Jun 08, 20:	Sarah	Critical Eve	Sarah launched the Critical Event 'Earthquake in Los Angeles'
CRISISTASI	Shelter In I	Jun 08, 20:	Sarah	Critical Ta:	Sarah changed the basic information of the Critical Task List 'Shelter In Place'
SURVEY	Test	Jun 15, 20:	Sarah	Tracker La	Sarah launched the Tracker 'Test'
MEETINGI	Meeting M	Jan 12, 20:	Sarah	Critical Eve	Sarah added the Critical Event Meeting Minute 'Meeting Minutes - Jan 12, 2024 14:17:41 PST' to the Critical Event 'Earthquake in Los Ang

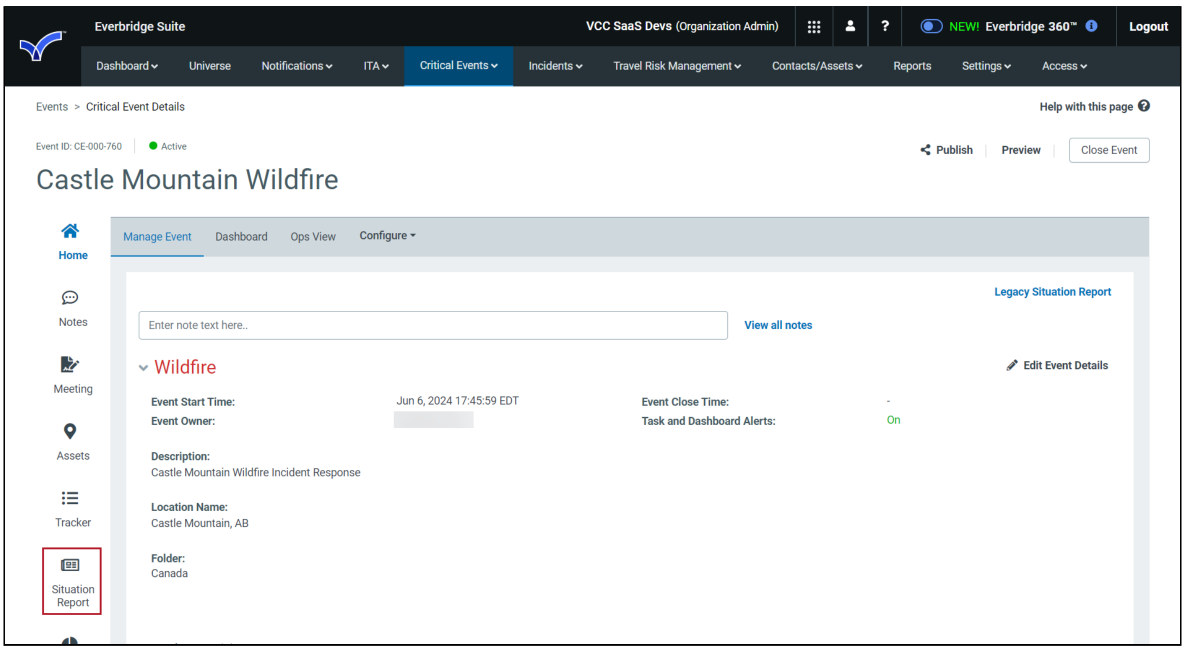
Managing the Situation Report

Users can customize the Situation Report to include or exclude certain elements from the report. For example, users who do not want the Task List can exclude it from the Situation Report.

Create a New Situation Report

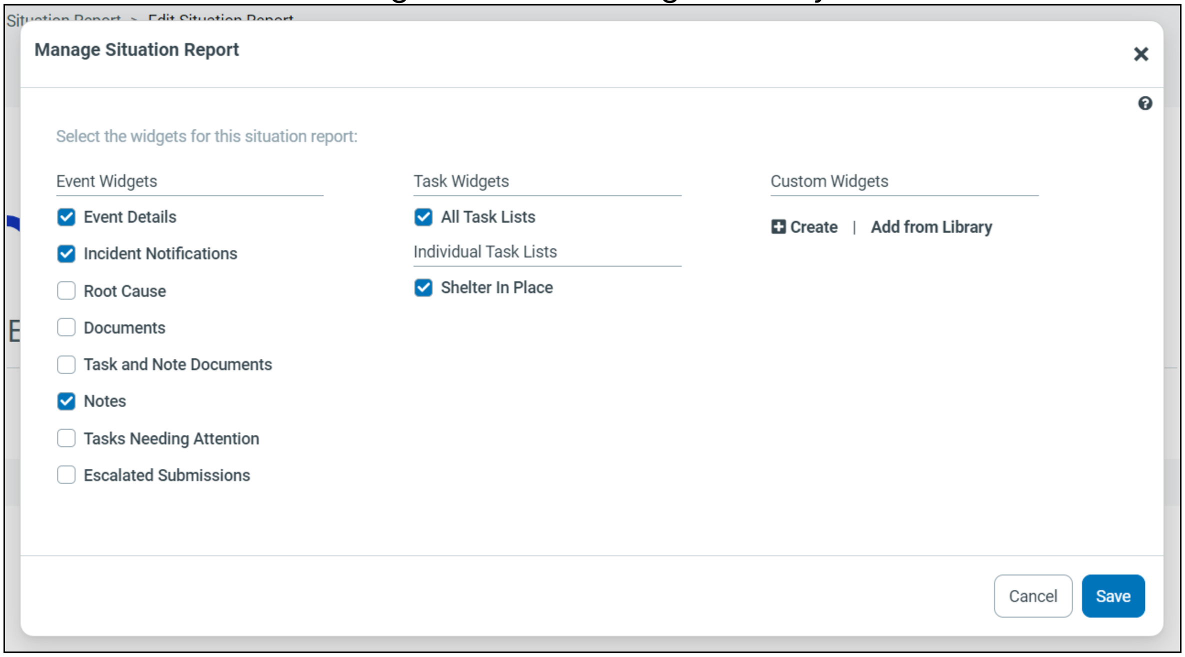
To create a new Situation Report:

1. From the **Critical Events Details** page of an event, click the **Situation Report** tab to the left.



2. Click **New Situation Report**.
3. Type a name for the report and click **Create**.
4. Click **+** located near the upper right-hand corner of the page. The **Manage Situation Report** dialog appears.

5. Select the check boxes of the elements you want on the report. You can also create or add custom widgets from the Widgets library.



6. Click **Save**.
7. Click **Situation Report** to return to the **Critical Event Details** page.

Based on what you select in the **Manage Situation Report** function, the report reflects those choices.

Anyone on the Crisis Management team can optionally add an Executive Summary. Be sure to click **Save**. Then, click **Preview** to see the Situation Report in a Document format, which can be exported to PDF.

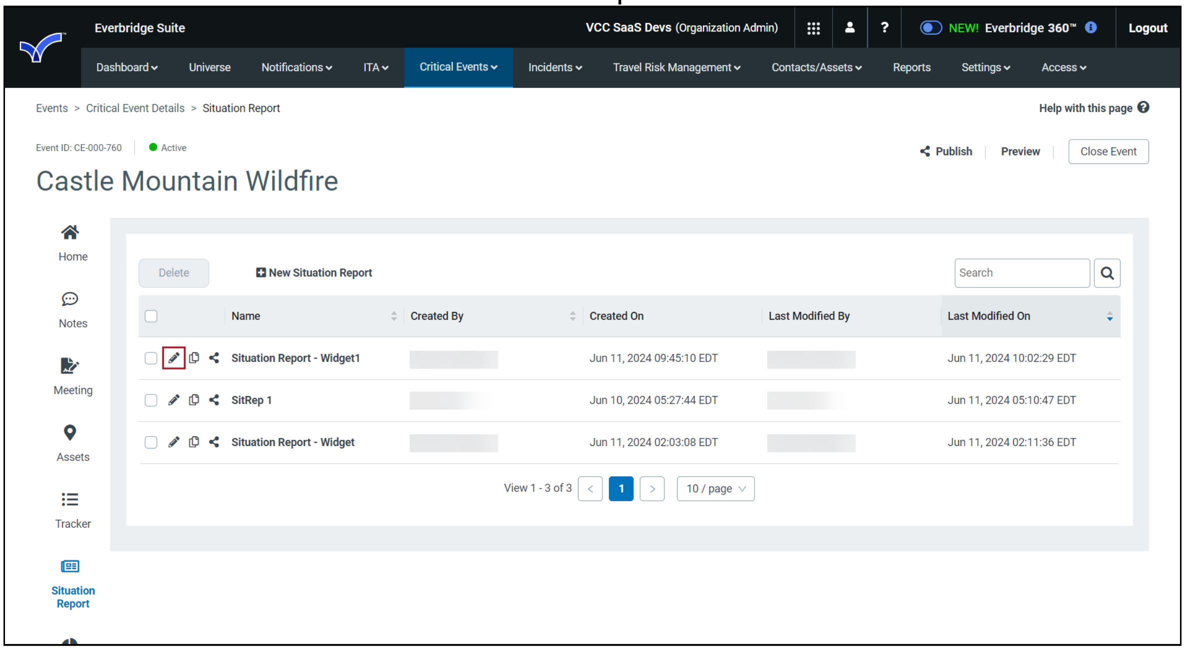
To export the report to PDF, click **Print**, provide a unique filename, then click **Save**.

Edit a Situation Report

To edit a Situation Report:

1. From the Critical Event Details page, click the **Situation Report** tab.

2. Select the Pencil icon of the Situation Report to be edited.



3. Make your changes by clicking the Widget Control (the three dots in the upper right-hand corner of each widget). You can:
   - Edit the widget title, then click **Save**.
   - Remove the widget.
4. Optionally, click the blue + sign to select the widgets for this Situation Report, then click **Save**.
5. Optionally, reorder the placement of the widgets by holding down the mouse on the widget title and dragging it to the desired position.
6. Optionally, toggle on the Page Break. Then, scroll to the bottom of the Situation Report and click the Page Break icon in the lower right-hand corner.
7. Optionally, click the **PDF** icon to export the Situation Report to PDF.

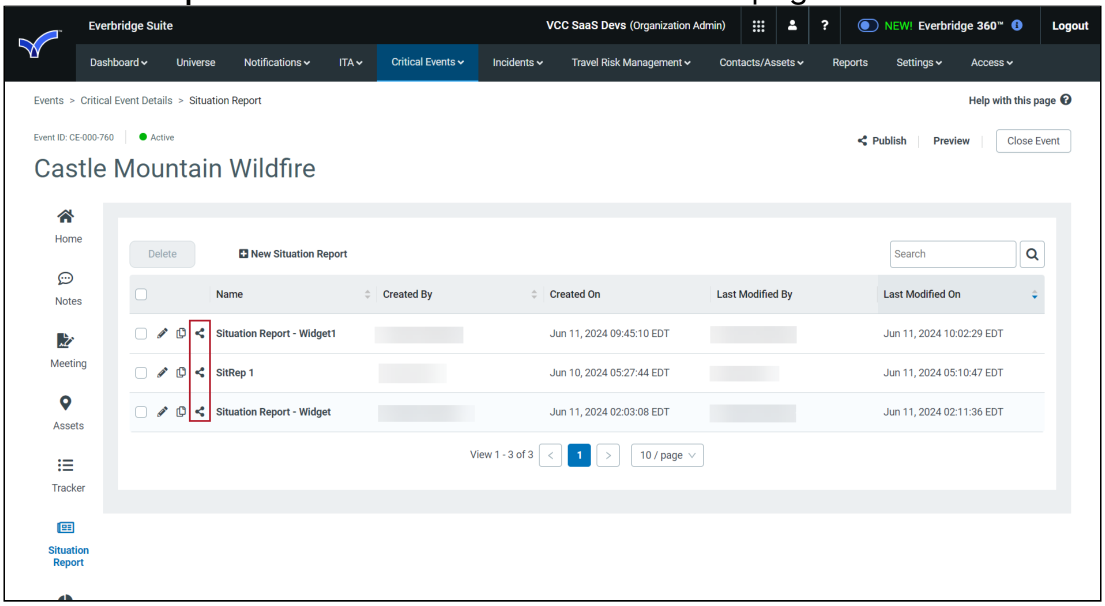
Share a Situation Report

Situation Reports can be emailed directly to contacts during various stages of a Critical Event to keep stakeholders apprised of the latest status and response efforts.

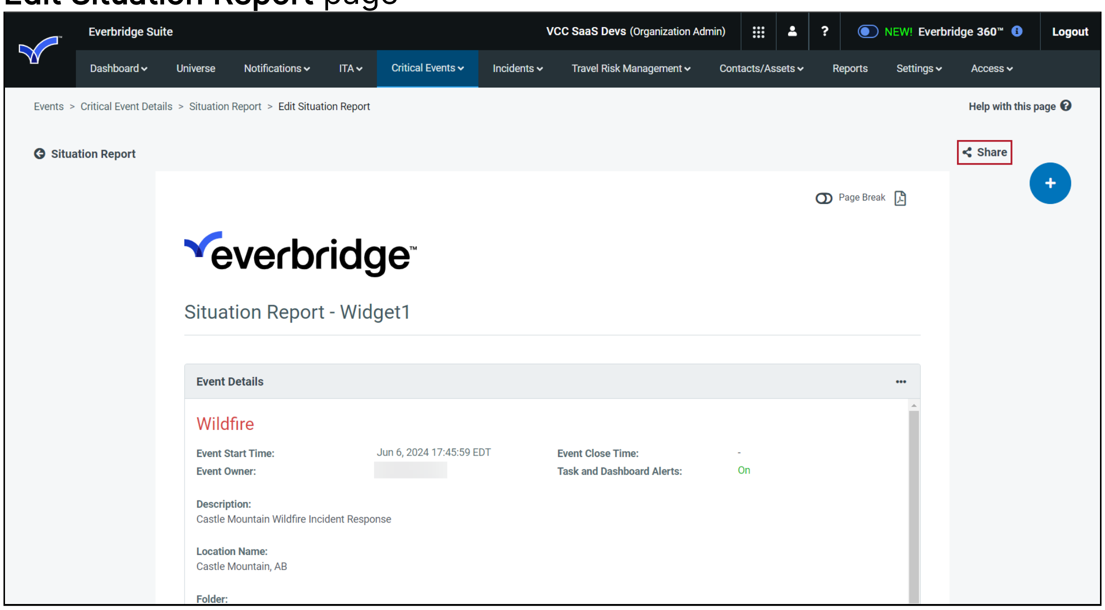
To share a Situation Report:

1. Situation Reports can be shared from two places:

- **Situation Reports** list on the **Critical Event Details** page.

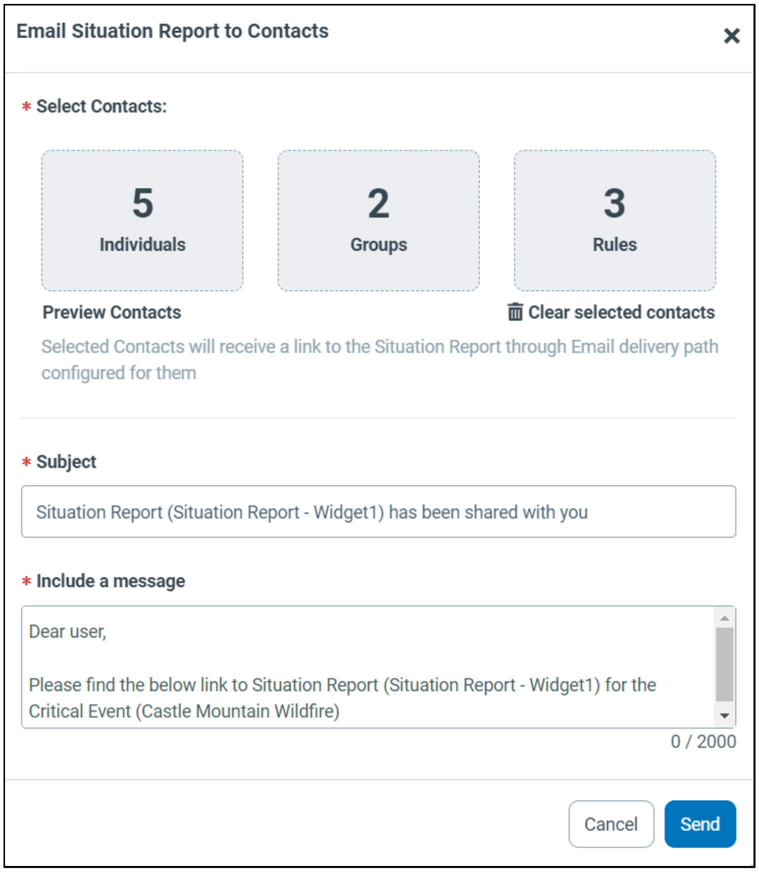


- **Edit Situation Report** page



2. Click the **Share** icon.

3. The contact modal appears. Select the recipients via Individuals, Groups, and/or Rules.



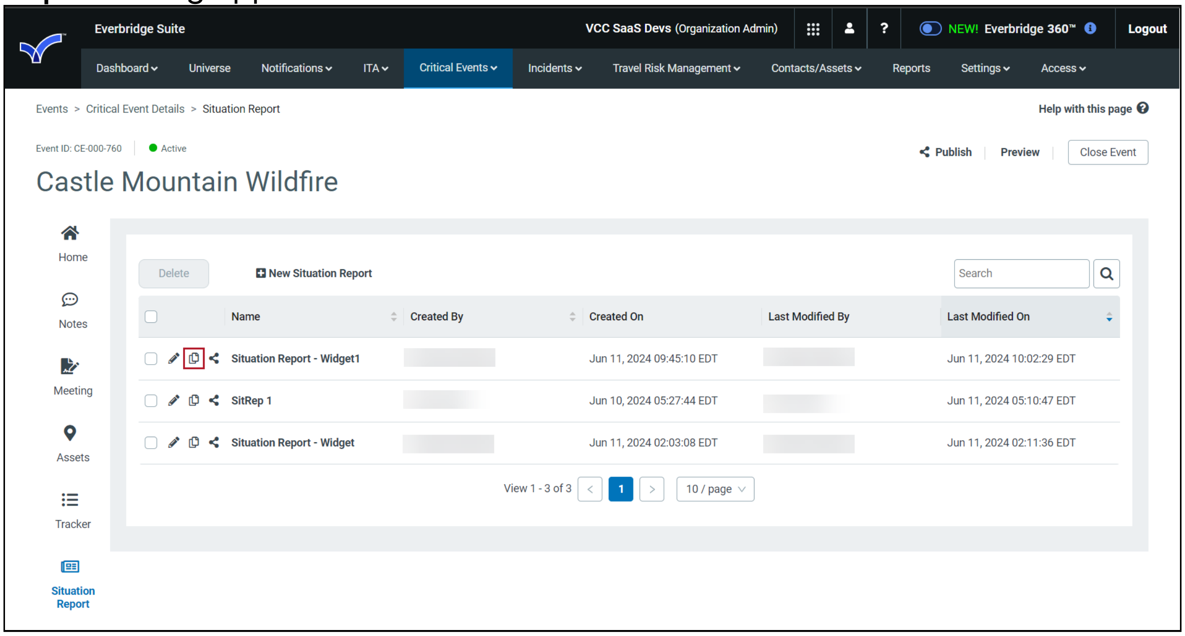
4. If desired, customize the **Subject** and **Include a Message** fields, or leave the default text.
5. Click **Send.** The selected recipients will receive the emailed link to the Situation Report.

Copy a Situation Report

To copy a Situation Report:

1. From the **Critical Event Details** page, click the **Situation Report** tab.

2. Select the **Copy** icon of the Situation Report to be copied. The **Copy Situation Report** dialog appears.

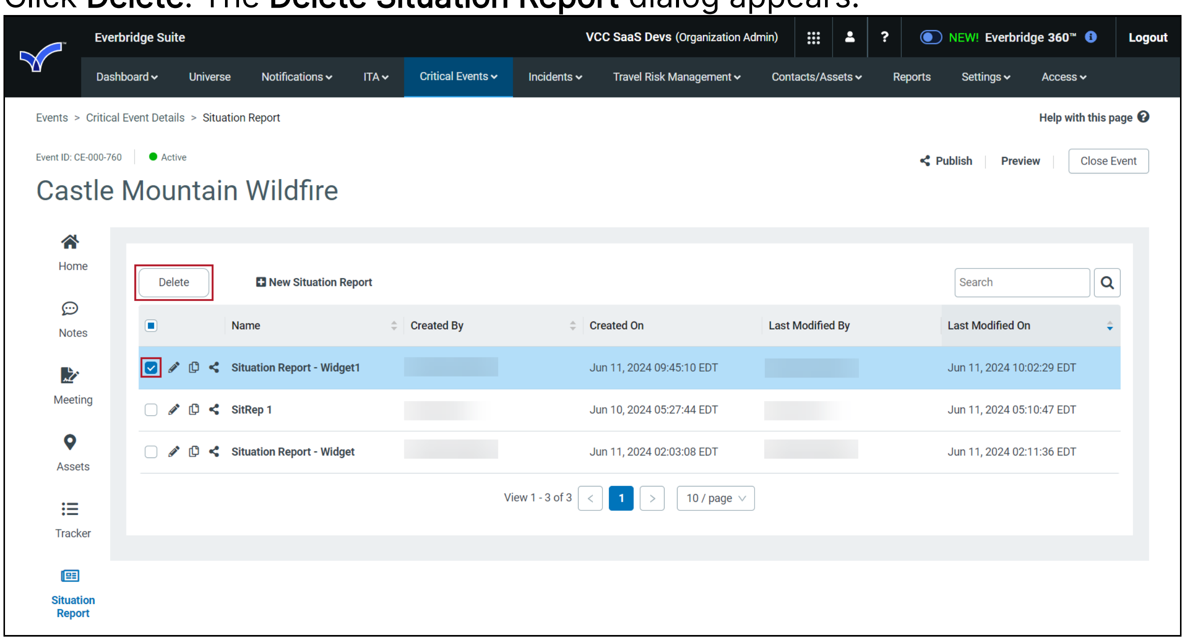


3. Change the name of the Situation Report and click **OK**.
4. Edit as needed.

Delete a Situation Report

To delete a Situation Report:

1. From the **Critical Event Details** page, click the **Situation Report** tab.
2. Select the checkbox of the Situation Report to be deleted.
3. Click **Delete**. The **Delete Situation Report** dialog appears.



4. Click **Delete Situation Report** to permanently remove the Situation Report from this event.

Creating and Maintaining a Form Report

After you upload your forms in the Form Library, you can use any form to generate a Form Report or perform other actions on a Form Report. Updating a form report is flexible and event information can be automatically populated. You can also use incident variables to automatically generate event information.

Viewing a Form Report

You can view a Form Report from the **Critical Event Details** page of an event.

To view a Form Report:

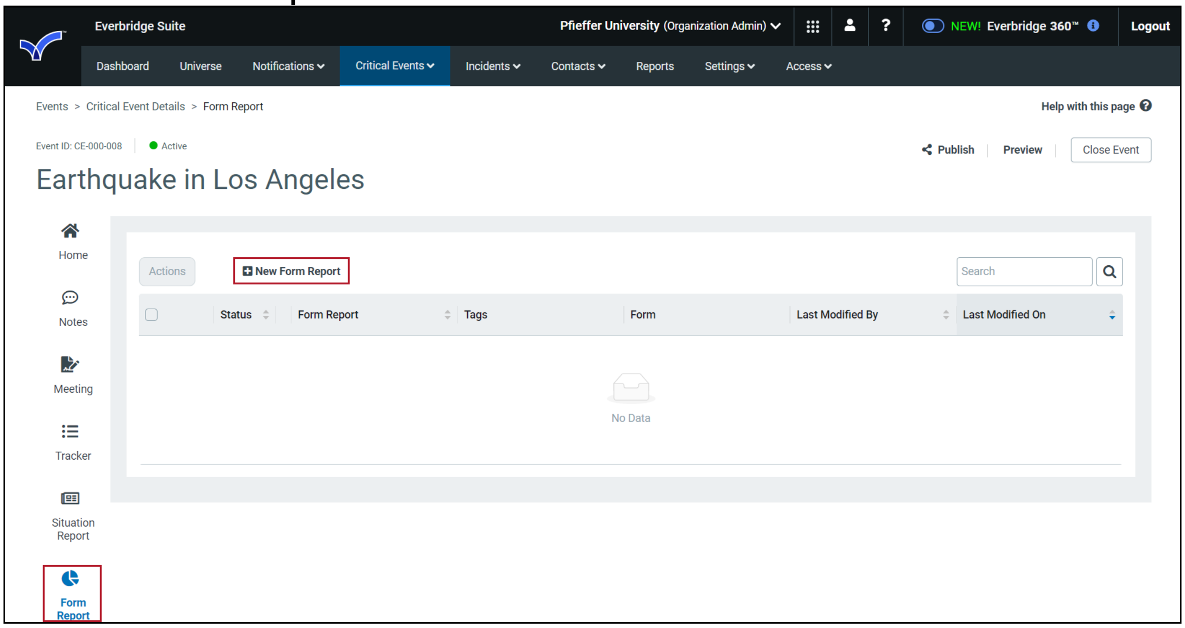
1. From the event's **Critical Events Details** page, click the Form Report icon. The **Form Report page** appears.
2. Select the report to view.
3. Do one of the following:
    - Click **PDF** to create a PDF of the Form Report.
    - Click **Close** to close the report.
    - Click **Edit** to make changes to the report.
4. To perform other actions on a Form Report, see the **Creating a New Form Report** and **Maintaining Existing Form Reports** sections below.

Creating a New Form Report

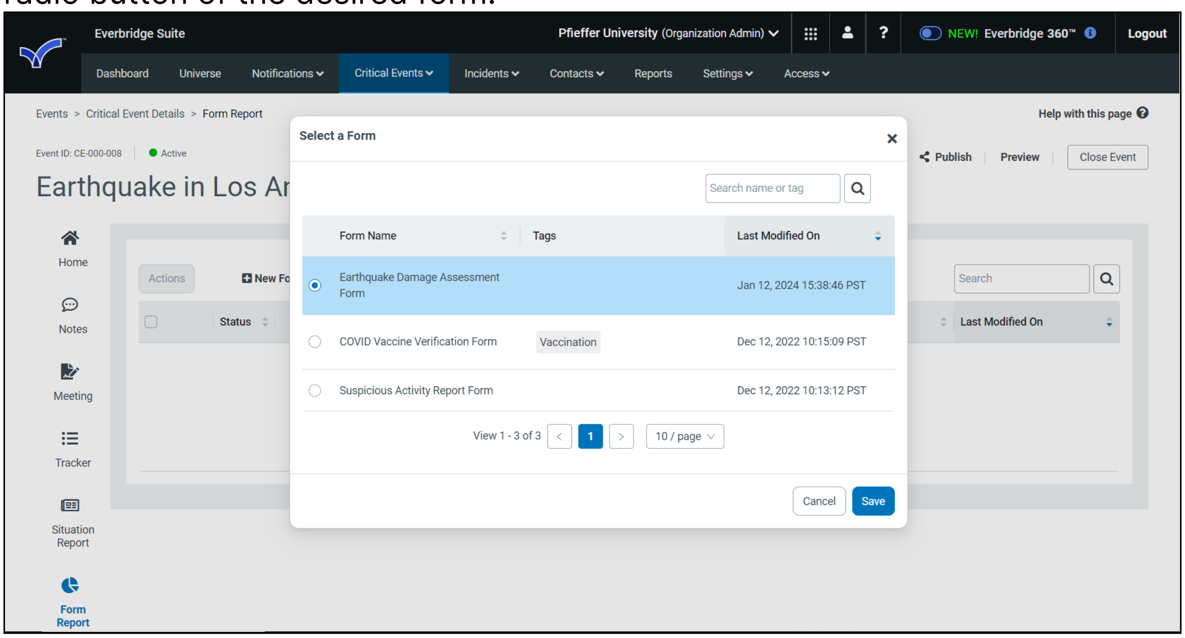
To create a new Form Report:

1. From the **Critical Event Details** page, select **View Form Report**. The **Form Report** page appears.

2. Click **New Form Report**.

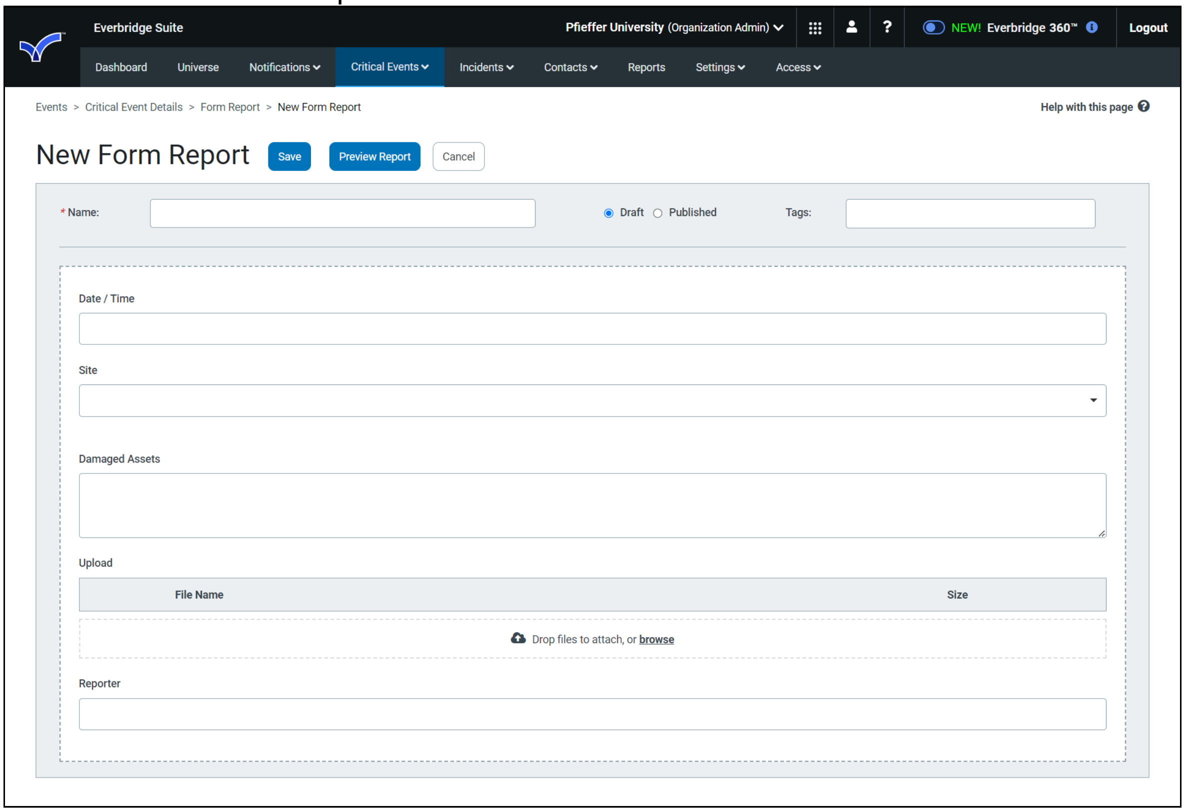


3. The **Select a Form** dialog displays the forms from your Form Library. Click the radio button of the desired form.



4. Click **Save**. The New Form Report displays the form as a template.

5. Give the new Form Report a name.



6. As needed, change the report status from **Draft** to **Publish** (or vice versa).
7. Optionally, add **Tags**.
8. Optionally, to see the report in **Preview** mode, click **Preview Report**. Then, click **Close.**
9. Click **Save**.

Maintaining Existing Form Reports

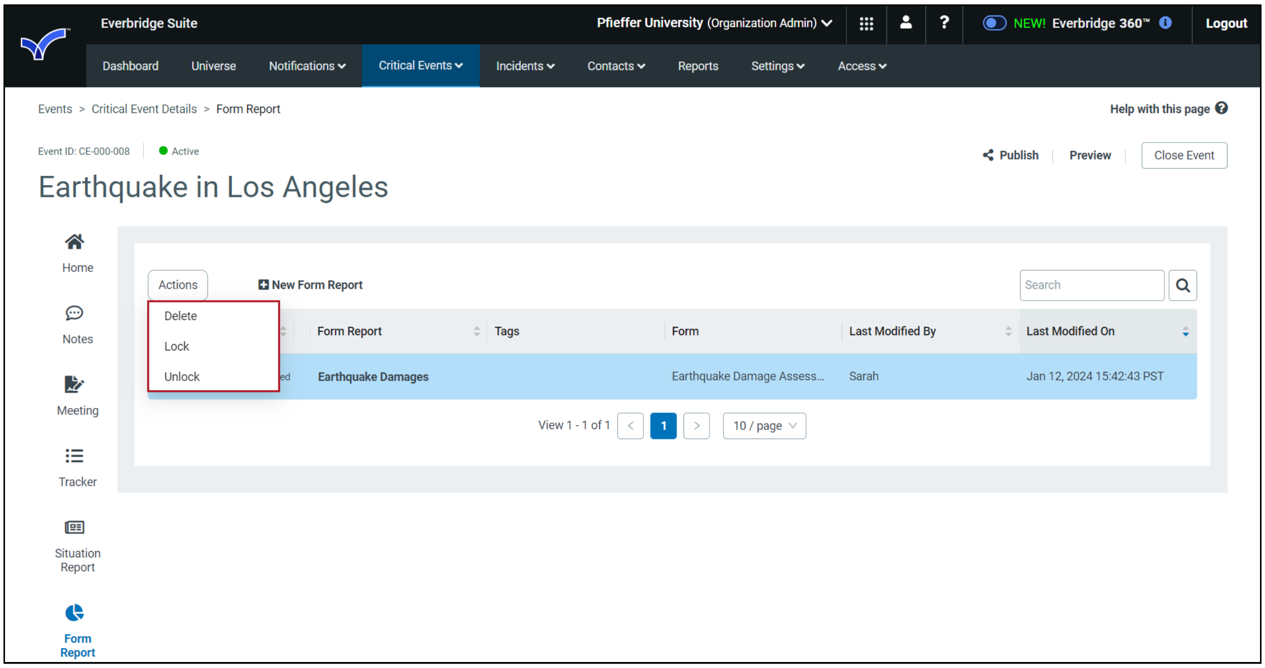
You can delete, lock, or unlock a report from the Form Report page. You can also copy a Form Report, edit a form report, and change the status of a Form Report from Draft to Publish and vice versa.

Delete, Lock, or Unlock a Form Report

To delete, lock, or unlock a Form Report:

1. From the **Form Report** page, select the checkbox to the left of the desired Form Report. The **Actions** menu becomes enabled.
2. Select one of the actions:
   - **Delete** — You can delete the Form Report altogether.
   - **Lock** — You can only lock an unlocked Form Report. When selected, a lock icon appears next to the Form Report name and changes cannot be made to the report.

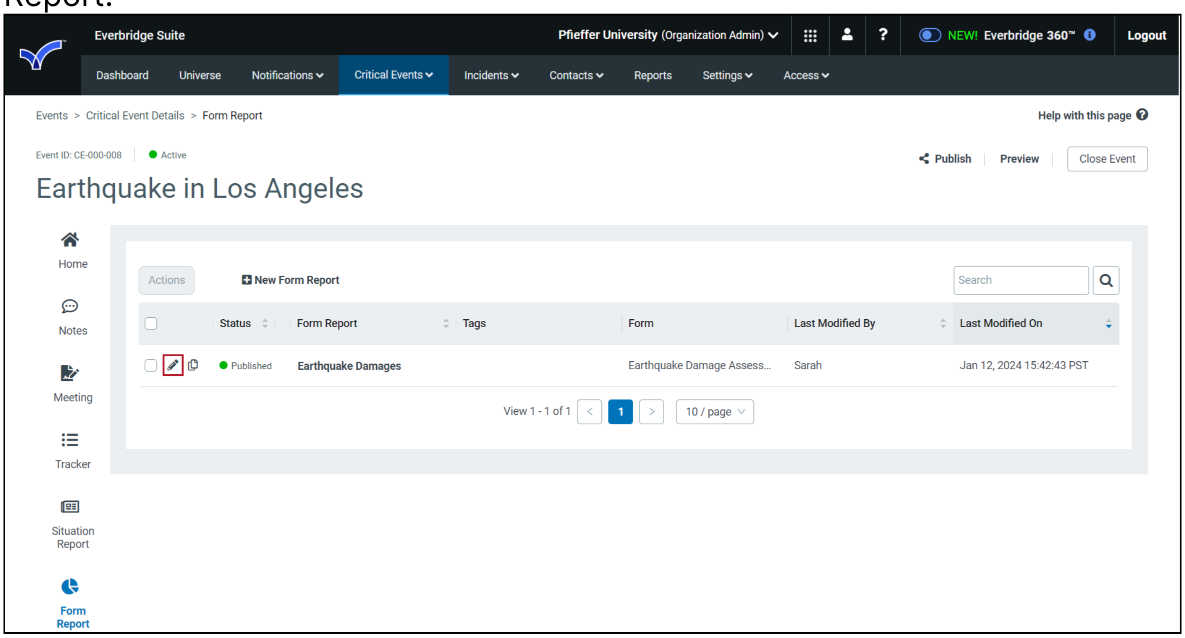
- **Unlock** — You can only unlock a locked Form Report.



Edit a Form Report

To edit a Form Report:

1. From the **Form Report** page, select the **Pencil** icon of the desired Form Report.



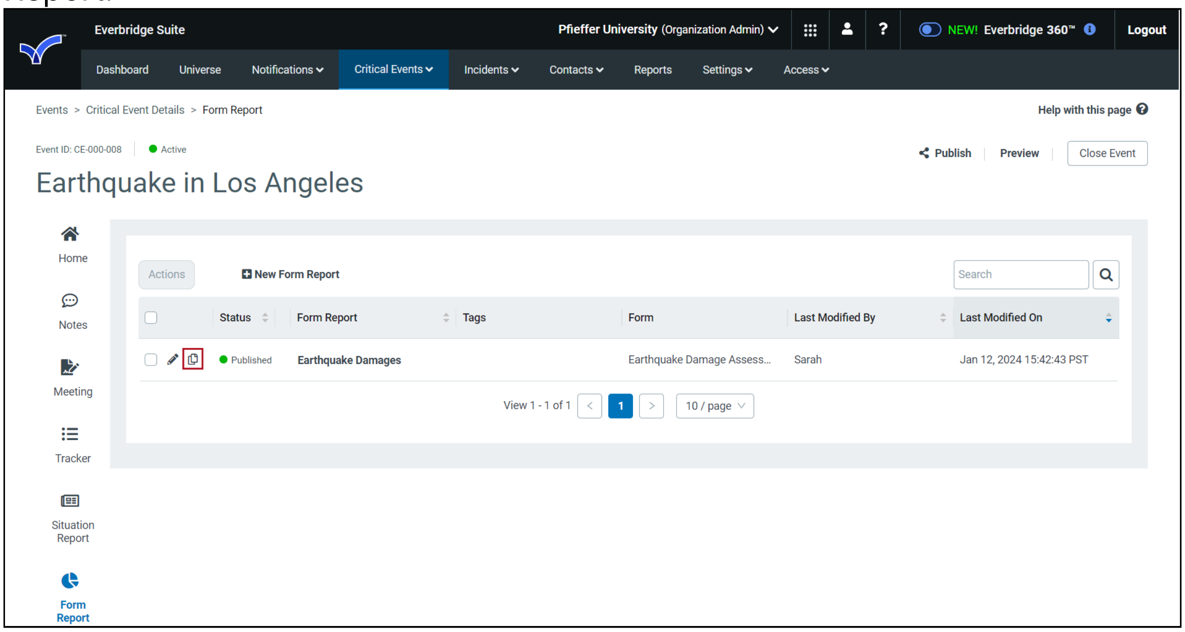
2. The **Edit Form Report** appears. Make any changes.
3. As needed, change the report status from **Draft** to **Publish** (or vice versa).
4. Optionally, add Tags.

5. Optionally, click the PDF icon to generate a PDF of the report.
6. Optionally, to see the report in **Preview** mode, click **Preview Report**. Then, click **Close** to close the report.
7. Click **Save**.

Copy a Form Report

To copy a Form Report:

1. From the **Form Report** page, select the **Pencil** icon of the desired Form Report.



2. The **Copy Form Report** dialog appears. Rename the Form Report.
3. Click **OK**.

Collecting Real-Time Contact Information

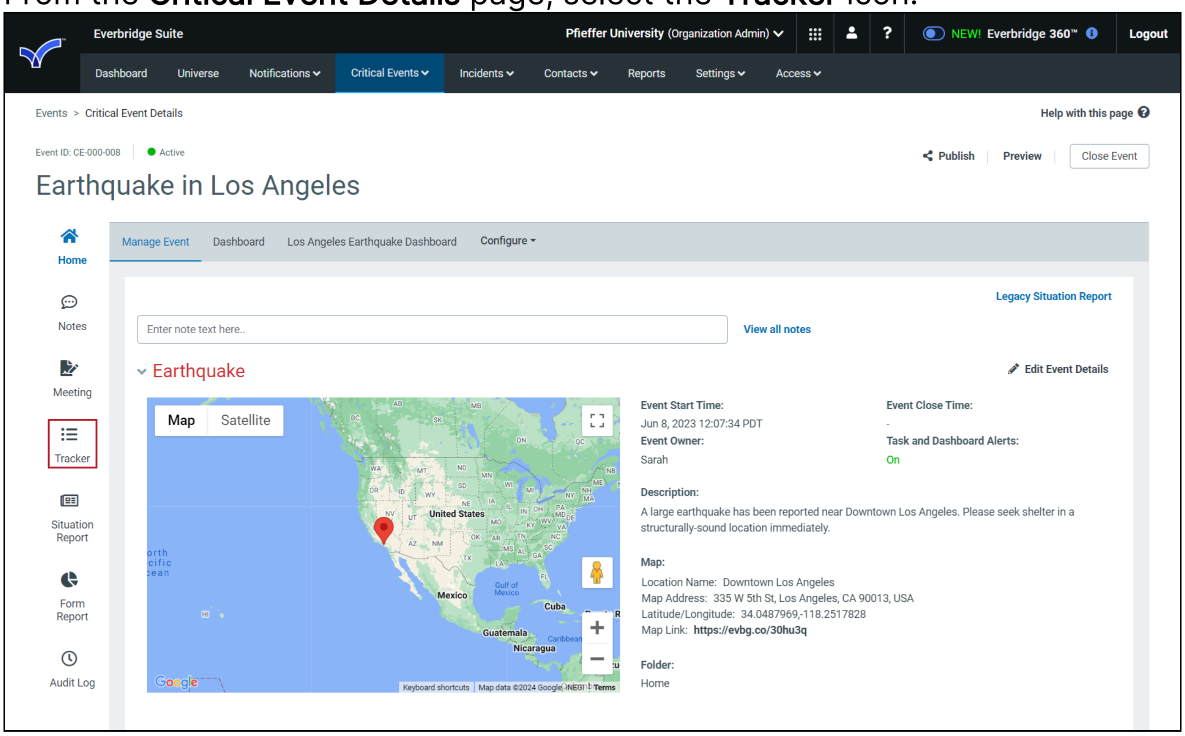
The **Tracker Survey** is the initial phase of the Impact Tracker. Tracker surveys are a way to communicate with your contacts and collect valuable information during a Critical Event. From the **Critical Event Details** page, you can design a form and then launch a tracker survey.

> **NOTE:** Trackers are not supported for Critical Events launched from Visual Command Center or ManageBridge.

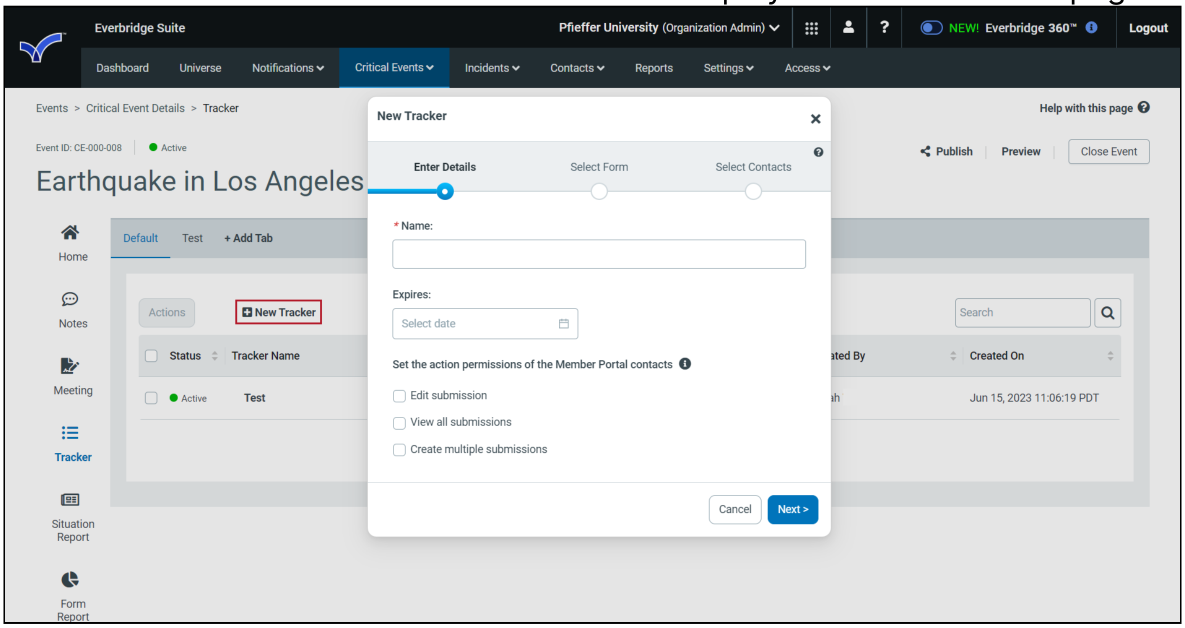
Create a Tracker

To create a new Tracker:

1. From the **Critical Event Details** page, select the **Tracker** icon.

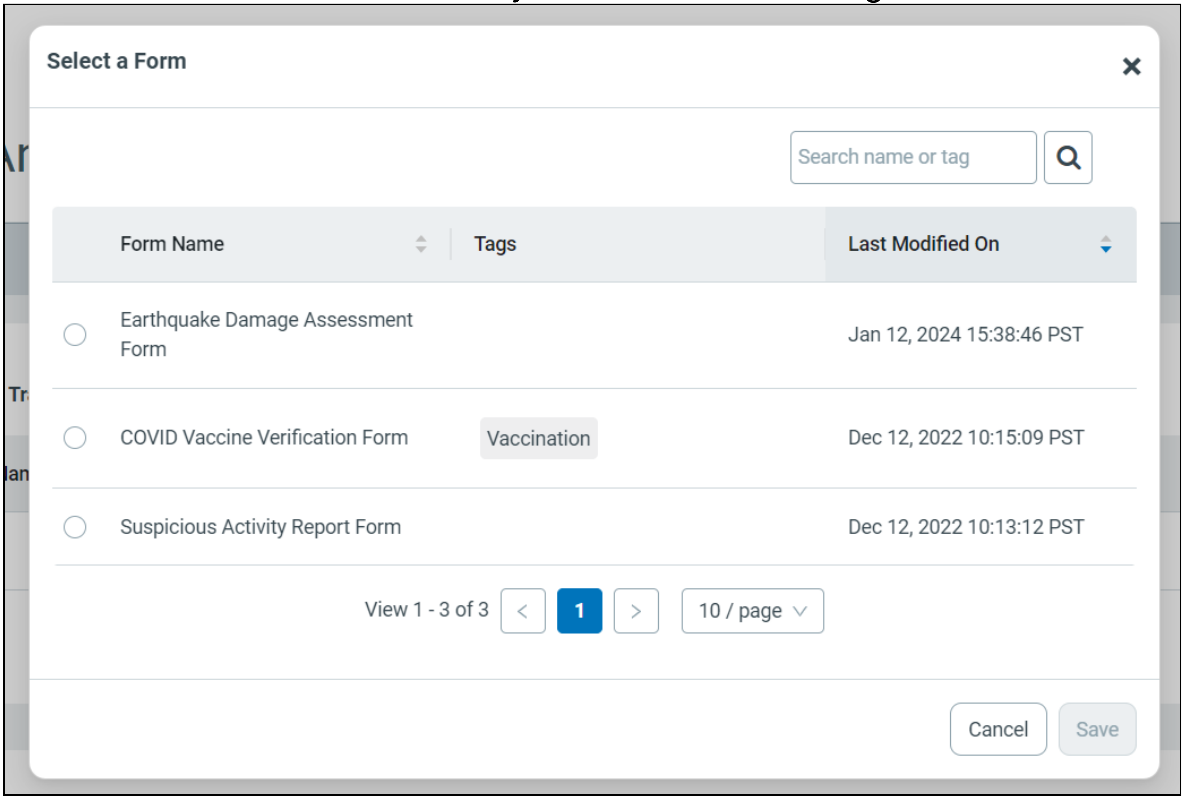


2. Click **New Tracker**. The **New Tracker** wizard displays the **Enter Details** page.

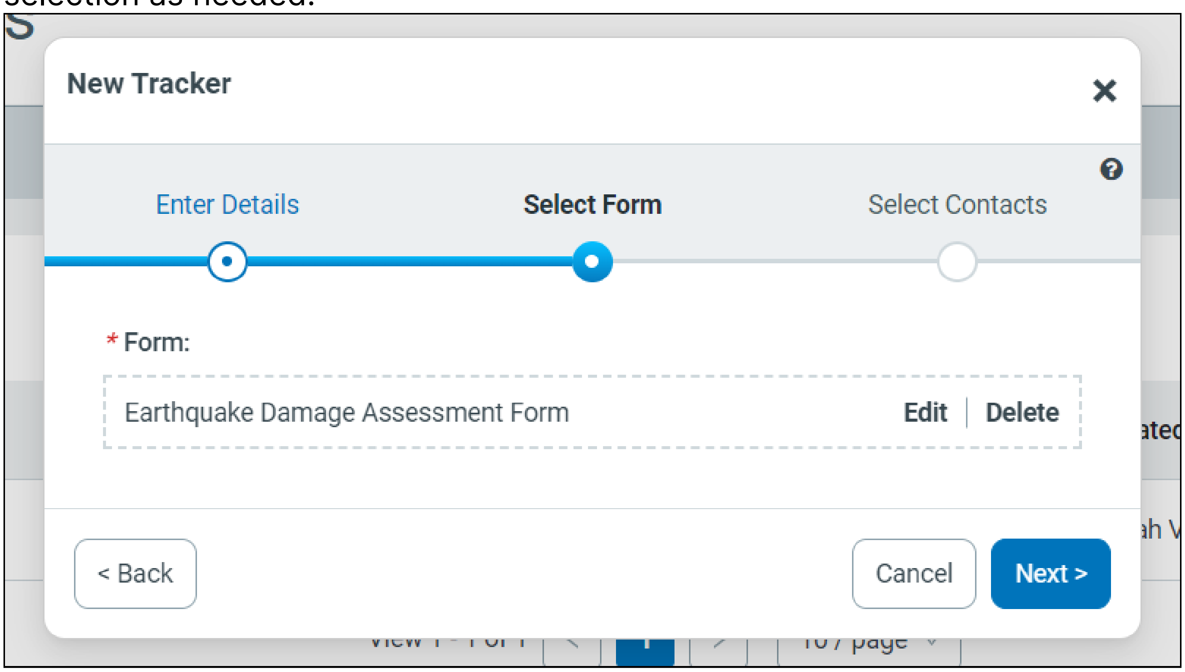


3. Type a name for your tracker.
4. Select a date from the Calendar icon when you want the tracker to expire.
5. Select the checkbox to set the permissions of the Member Portal contacts:
   - **Edit submission** - Allows changes to tracker answers
   - **View all submissions** - Enables Members to view each other's submissions
   - **Create multiple submissions** - Enables Members to submit the tracker multiple times. For example, for the Member and then on behalf of another Member.
6. Click **Next**. The **Select Form** page appears.
7. Click **Select a Form**.

8. Select the radio button next to the form from the **Form Library** and click **Save**. You can edit or delete the form if you need to make changes.

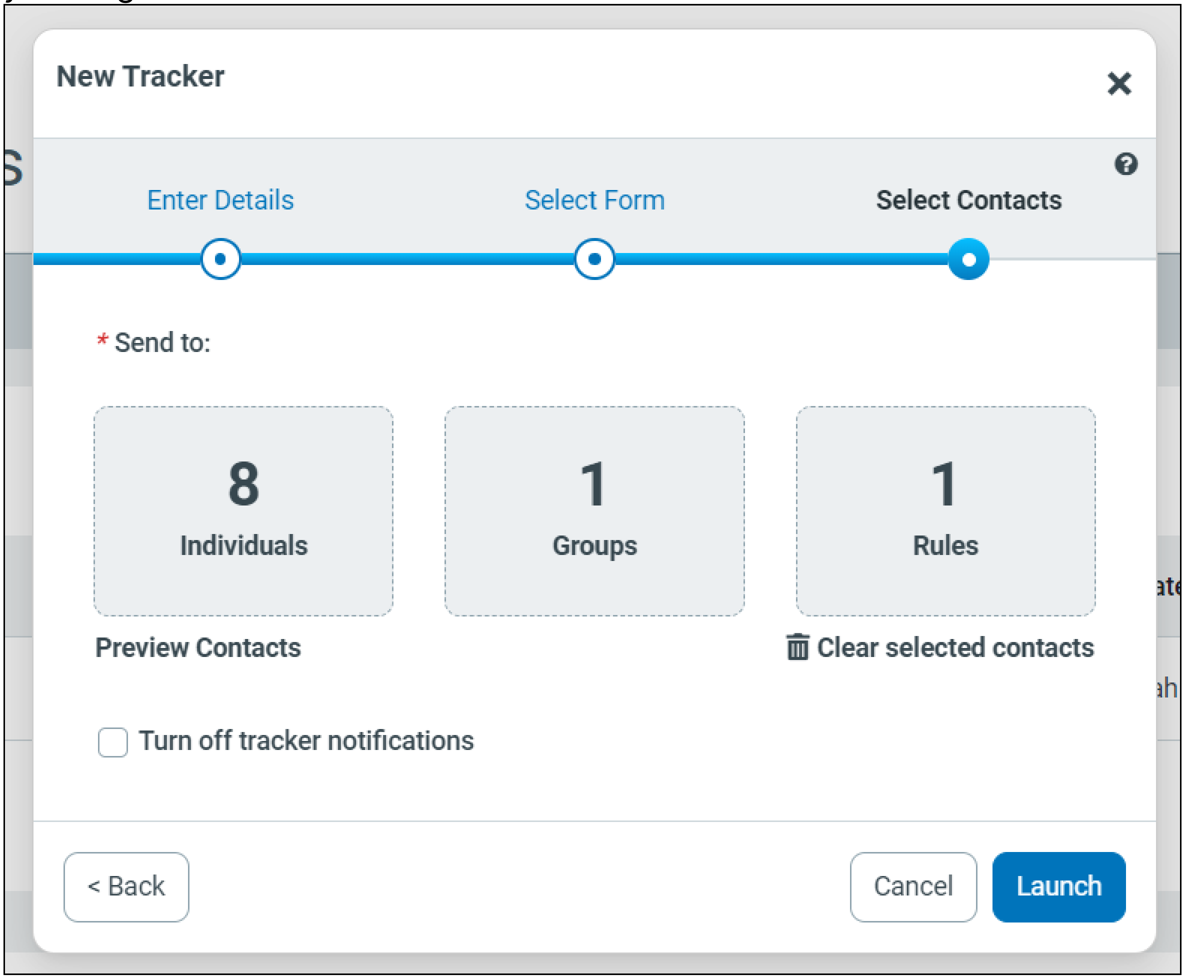


9. Click **Save** and confirm the Form selection on the next screen, or change the selection as needed.



10. Click **Next**. The **Select Contacts** page appears.

11. Click **Individual**, **Groups**, or **Rules**. The **Select Contacts** dialog is displayed for your Organization.



12. Select your contacts from each sub-tab, as needed, and click **Select**.
13. Click **Launch**.
14. Click **OK**.

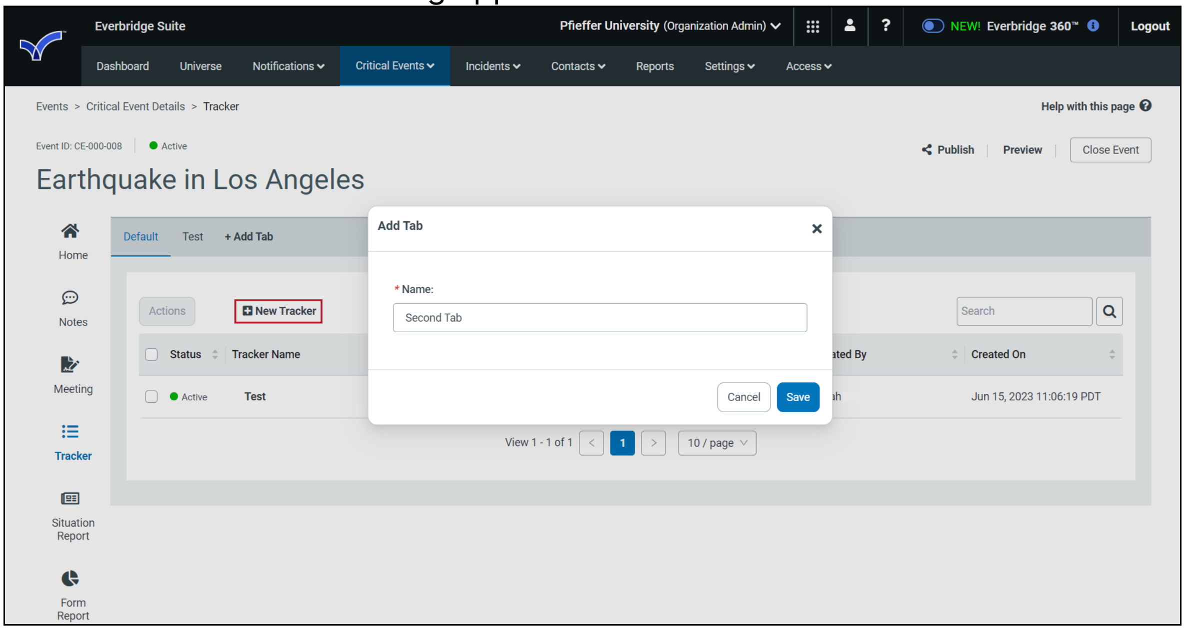
Targeted contacts receive a Tracker Notification by email and SMS. From the Member Portal, they complete the Tracker and submit the results.

Add a Tab

To add a tab:

1. From the **Critical Event Details** page, click the **Tracker** icon.
2. Add tabs to classify your trackers. For example, Asset trackers go to one tab while Employee trackers go to a different tab. From the Trackers page, click

Add Tab. The **Add Tab** dialog appears.



3. Type a name for your tab.
4. Click **Save**. The tab name is added to the **Trackers** page.

Rename a Tab

To rename a tab:

1. From the **Trackers** page, hover the mouse over the tab name.
2. Click **Edit**. The **Rename Tab** dialog appears.
3. Type a new name over the existing name.
4. Click **Save**. The tab name is added to the **Trackers** page.

Delete a Tab

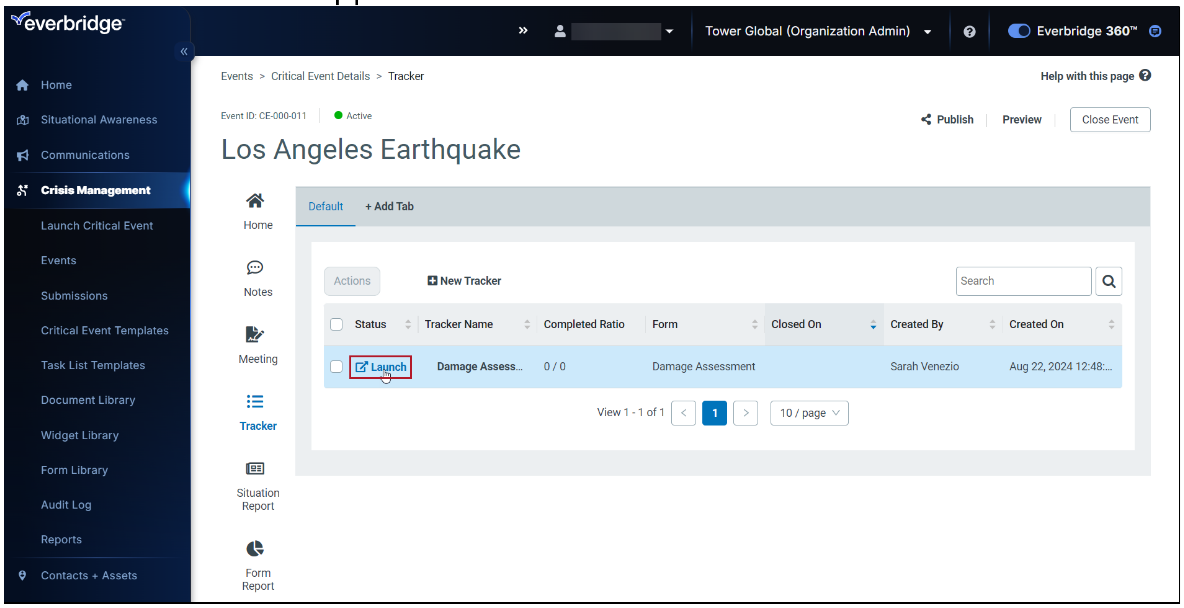
To delete a tab:

1. From the **Trackers** page, hover the mouse over the tab name to delete.
2. Click **Delete**. The Remove Tab dialog appears.
3. Click **Confirm**.

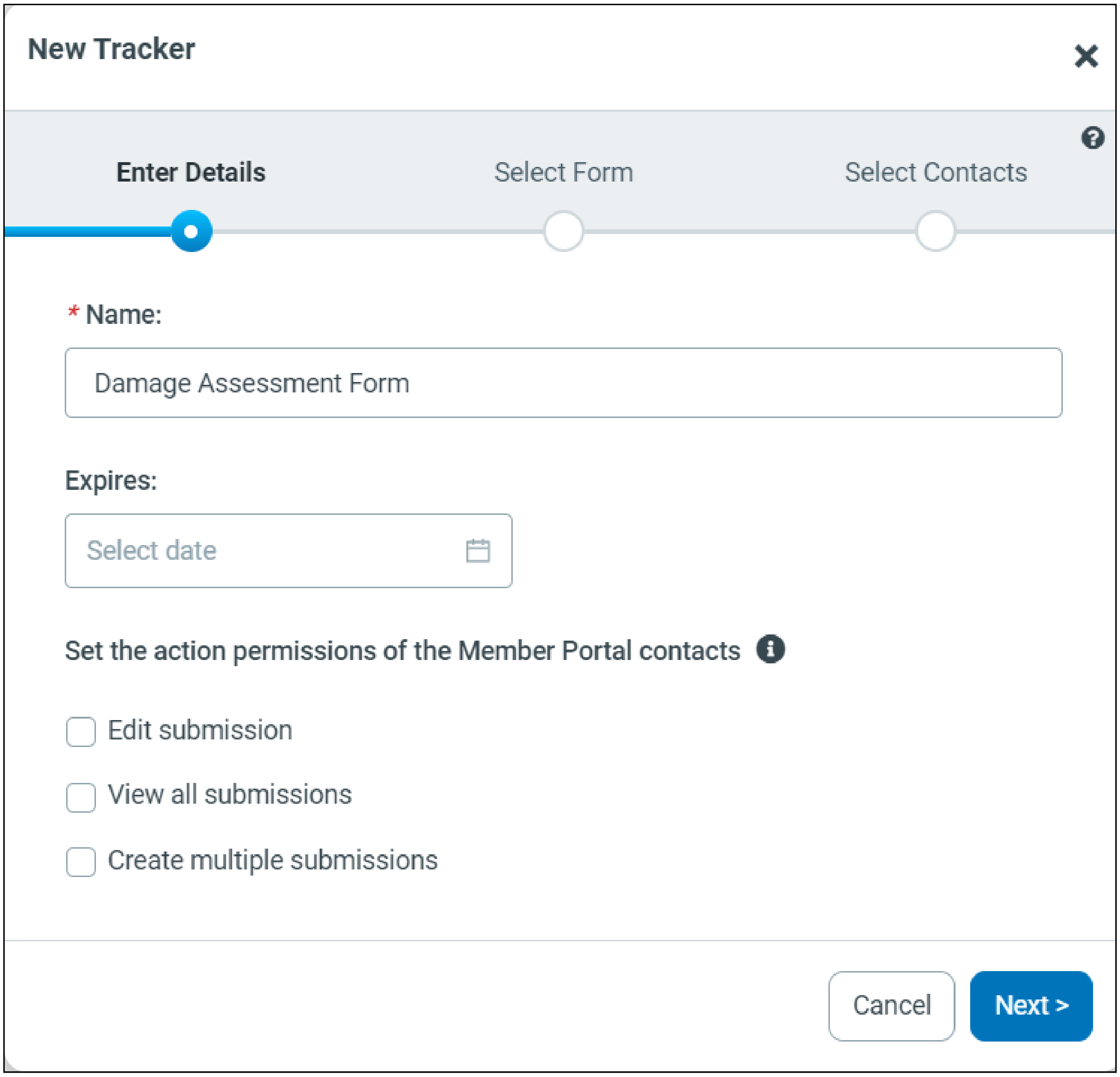
Launching a Tracker from a Template-based Critical Event

If a Critical Event is launched via a template that contains a tracker, the tracker can be launched from the **Critical Event Details** > **Trackers** tab. To launch the tracker:

1. Click **Launch** for the applicable tracker.



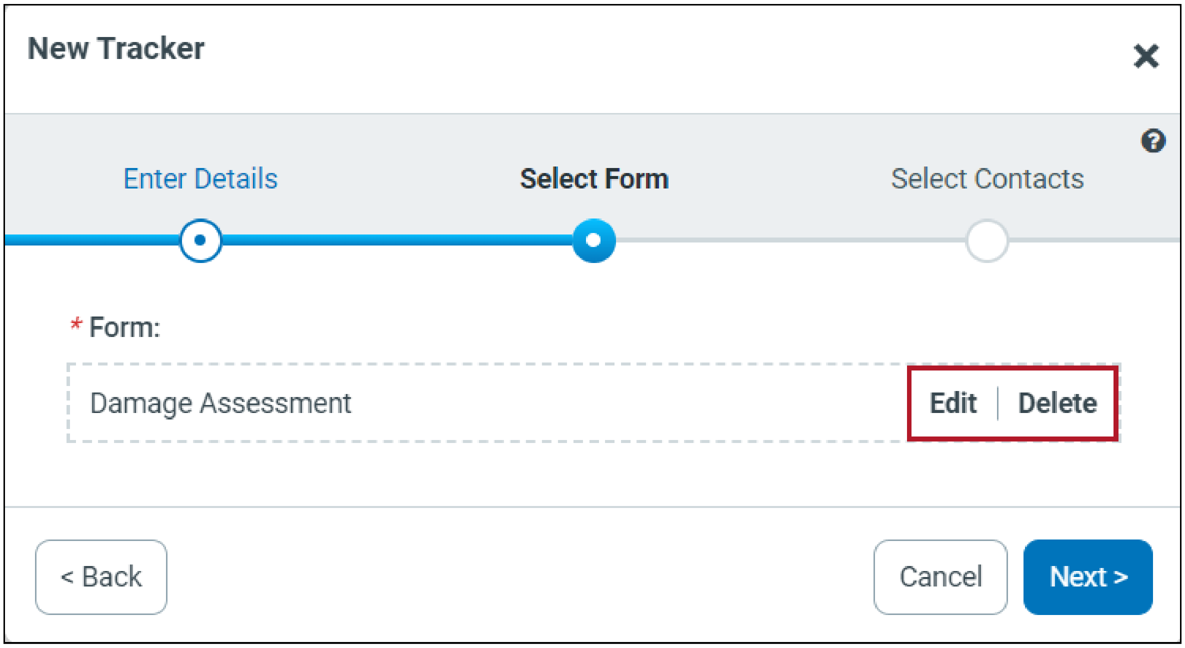
2. The **New Tracker** modal will appear with the inherited tracker details, such as the tracker name.



Before clicking **Next**, if applicable, set an expiration date and adjust the following permissions for Member Portal contacts:

- Edit submission
- View all submissions
- Create multiple submissions

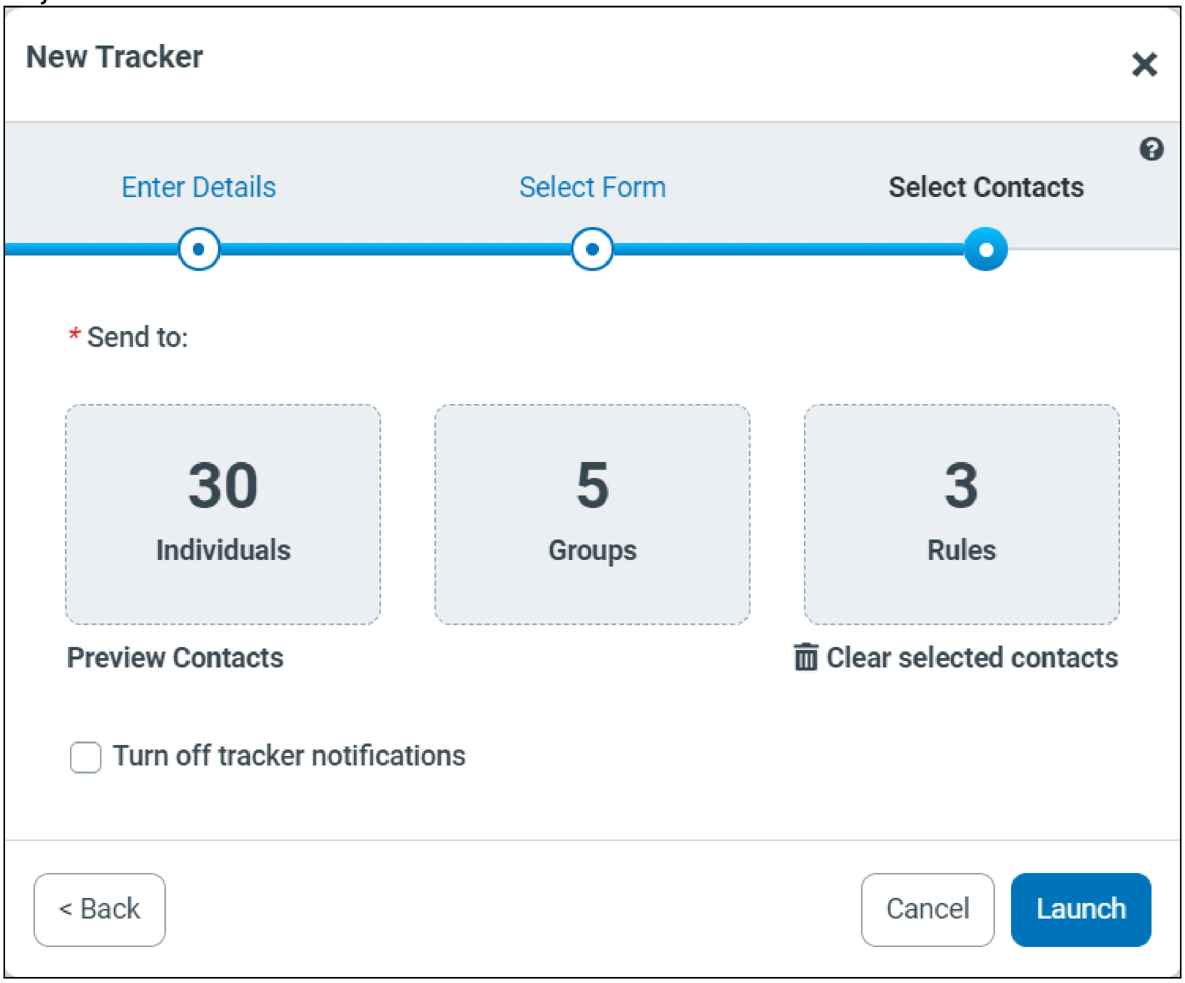
3. Continue to the **Select Form** tab, where the tracker's inherited form can be edited or removed as needed.



Click **Next**.

4. The tracker will automatically inherit the contacts, groups, and rules included in the tracker from the Critical Event Template. These can be previewed and

adjusted as needed from the **Select Contacts** tab.

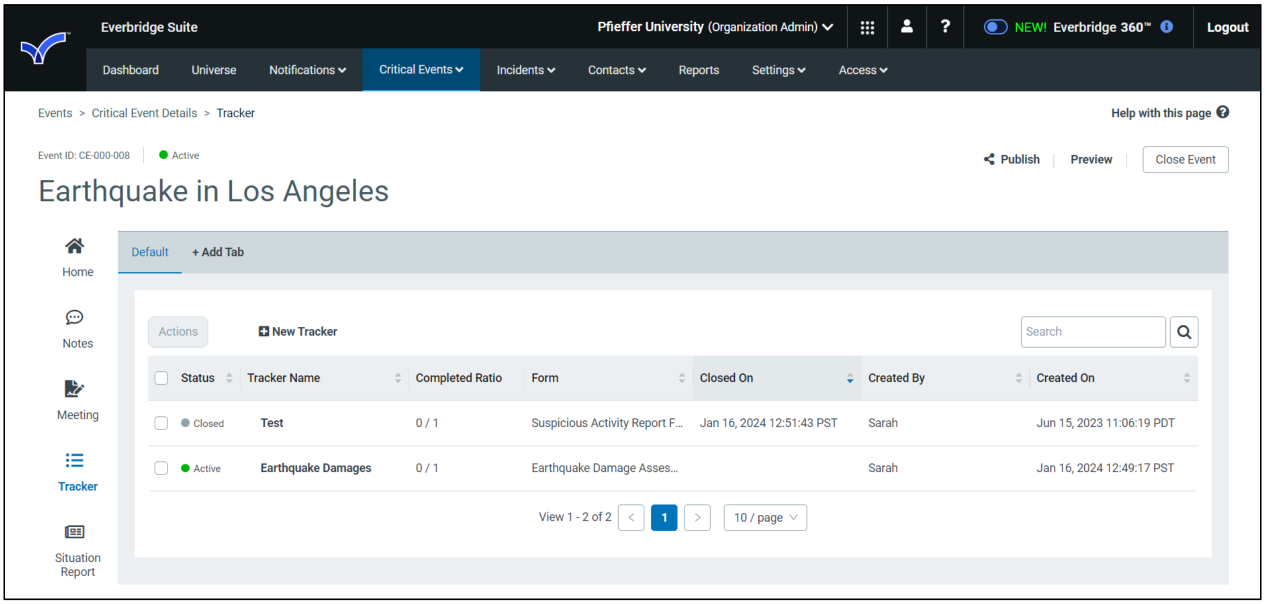


- Tracker notifications can be disabled by selecting the **Turn off tracker notifications** checkbox.

5. Click **Launch**.

Maintaining Your Trackers

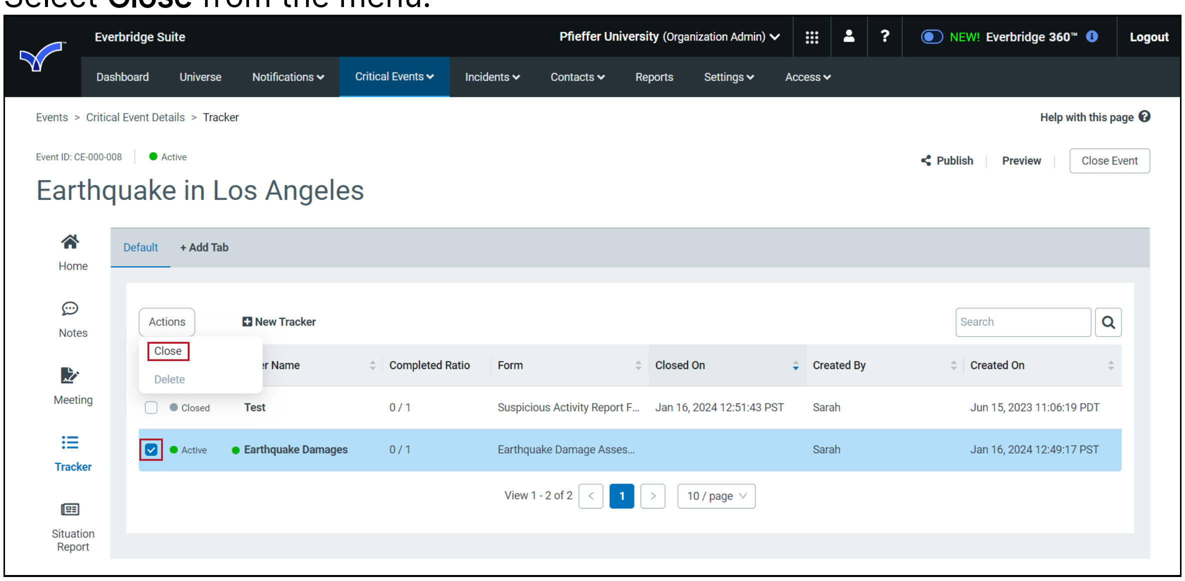
An event's Trackers are listed on its **Trackers** tab.



Close a Tracker

To close a Tracker:

1. From the **Trackers** page, select the check box next to the Tracker you want to close. The **Actions** menu becomes enabled.
2. Select **Close** from the menu.



3. The **Close Tracker** dialog appears. Click **Close** to confirm you want to close the Tracker.

Delete a Tracker

To delete a Tracker:

1. From the **Trackers** page, select the checkbox next to the closed Tracker that you want to delete. The **Actions** menu becomes enabled.
2. Select **Delete** from the menu. The **Delete Tracker** dialog appears.
3. Click **Delete** to confirm you want to delete the closed Tracker.

Manage Tracker Results

From the **Trackers** page, you can see your Trackers, their status, the ratio of completed Trackers versus the number of contacts who were sent the Tracker, and the form used in the Tracker.

To see the Tracker details:

1. From the Trackers page, select the Tracker name you want to review. The Tracker Details page is displayed.
2. Continue to the desired procedures below.

Add People and Groups to a Tracker

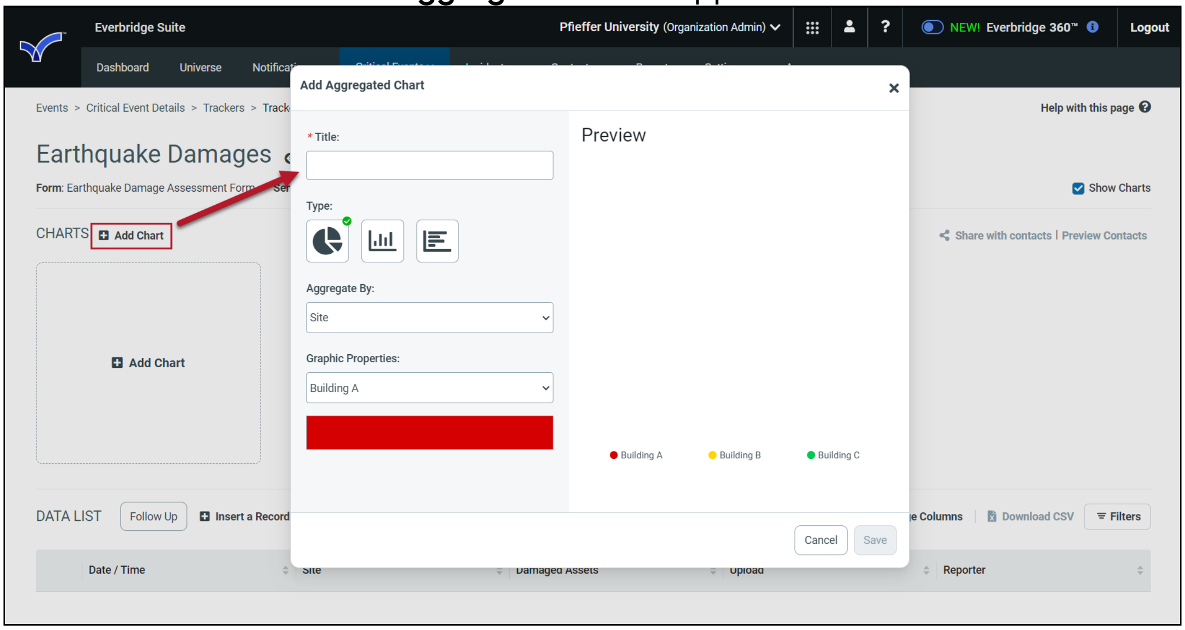
To add more people and groups to the Tracker:

1. Click **Follow Up**. The **Follow Up** dialog appears.
2. Select your additional contacts to receive the Tracker. If an active Tracker is already in place, you can add additional contacts to the Tracker without sending a new Tracker to all contacts.
3. Click **Follow Up**.

Add a Chart to a Tracker

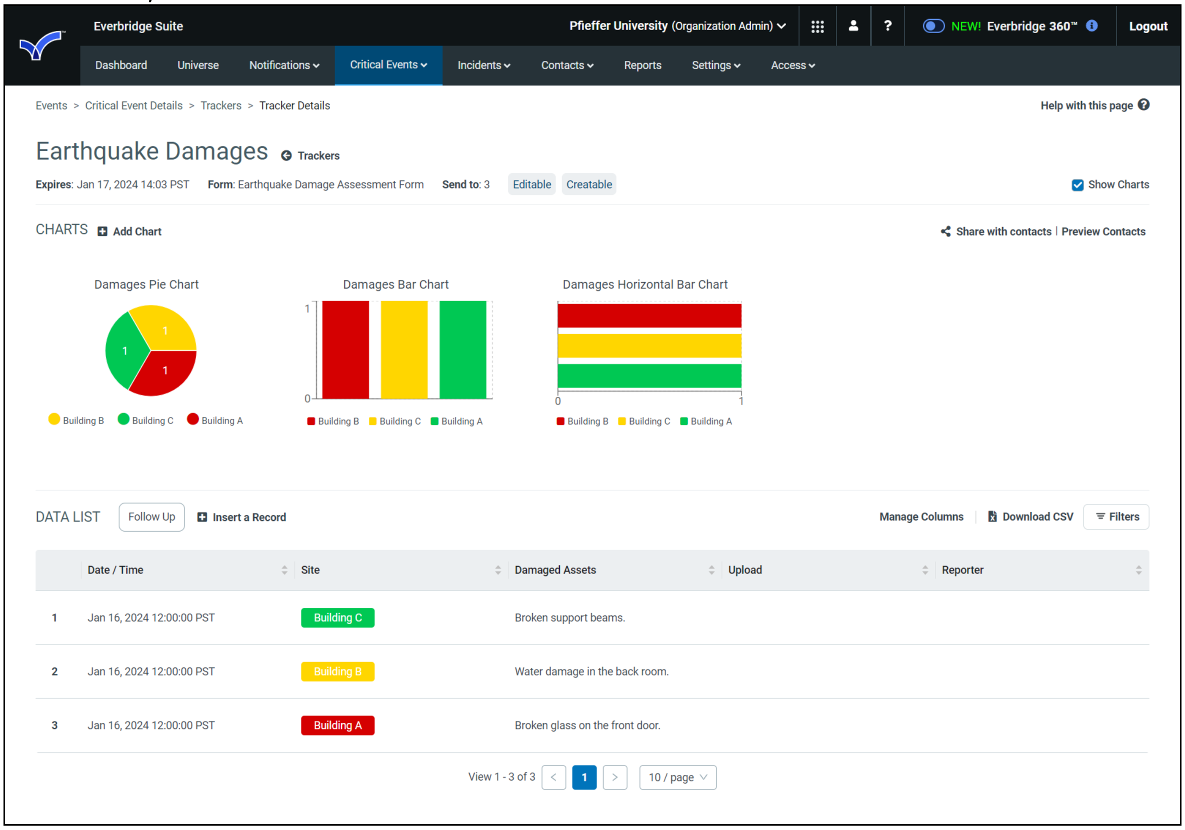
To add a chart to the Tracker:

1. Click **Add Chart**. The **Add Aggregated Chart** appears.



2. Enter the following:
   - In the **Title** field, type a name for your chart.
   - Select the type of chart:
     - The **Pie Chart** is a circle divided into sectors that each represent a proportion of the whole.
     - The **Horizontal Bar** chart's X-Axis represents the categories and the Y-Axis represents a value for the categories.
     - The **Vertical Bar** chart's X-Axis represents the categories and the Y-Axis represents a value for the categories.
   - In the **Aggregate By** field, select the column name from the menu.
   - In the **Graphic Properties** field, select the property corresponding to a color of the chart.
     - Double-click the field below the **Graphic Properties** field. Select the desired color or enter the Hex or RGB numbers to change the color.
3. Click **Save**. Your chart is added to the Tracker.

4. If needed, hover the mouse over each sector to see the labels.



Edit a chart

To edit a chart:

1. Click the Pencil icon of the chart you want to edit. The **Edit Aggregated Chart** dialog appears.
2. Make your desired changes.
   - In the **Title** field, type or replace the name for your chart.
     - The Type is a Pie Chart. The Pie Chart is a circle divided into sectors that each represent a proportion of the whole.
   - In the **Aggregate By** field, select the column name from the drop-down list.
   - In the **Graphic Properties** field, select the property corresponding to a color of the chart.
     - Double-click the field below the **Graphic Properties** the field with color. Select the desired color or enter the Hex or RGB numbers to change the color.
3. Click **Save**.

Delete a Chart from a Tracker

To delete a chart from a Tracker:

1. Click the **X** in the upper right-hand corner of the chart to be removed from the Tracker. The Remove Chart dialog is displayed.
2. Click **Confirm**.

Insert a Record

To insert a record:

1. From the **Tracker Details** page, click **Insert a Record**. The Tracker appears and allows you to provide answers on behalf of a contact.
2. Fill in the Tracker, then click **Submit**.
3. Click the **Tracker Details** link. The record is added to the **Data List** of the **Tracker Details** page.

View a Record in the Data List

To view a record in the Data List:

1. From the **Tracker Details** page, click the number of the record on the left-hand side of the list. The individual's Tracker appears.
2. You can:
    - Edit the record — Click **Edit**, make your changes, then click **Submit**.
    - Delete the record — Click **Delete**, then click **Confirm** to confirm the deletion.
    - View the record — View the record, then click the **Tracker Details** breadcrumb to return to Tracker Details.

Manage Table Columns

To manage the columns in the table:

1. From the **Tracker Details** page, click **Manage Columns**. The **Manage Columns** dialog appears.
2. Select up to eight columns to see for this Tracker.
    - Starting from the top of the dialog, select the desired column name from the drop-down list. Top-to-bottom column names become left-to-right columns in the Data List.
    - If less than eight columns are displayed, click **Add a column**. The column is added to the bottom of the dialog. Select the desired column name from the menu.
    - Reorder the columns by using the Hamburger menu and dragging a column name.

- If needed, remove a column by selecting the **X** to the right of its Column Name.

3. Click **Save**.

Filter Data by List

You can filter the data list by the following categories:

- **Submitted By**
- **Last Updated By**

To filter the data:

1. Click **Filters**.
2. Enter **Submitted By, Last Updated By**, or both, and click **Search**. The **Data List** displays your filtered results.

Share the Tracker

To share the Tracker with contacts:

1. Click **Share with contacts**.The **Share with Contacts** dialog appears.
    - Optionally, click **Clear selected contacts** to start fresh.
2. Click **Preview Contacts** to see who has already been sent the Tracker.
3. Select your Individuals, Groups, and/or Rules from each pane.
    - You can select the check boxes of Individuals, Groups, and Rules you want to remove.
4. Click **Select**.
5. Click **Share**. The Tracker is shared with the selected contacts.
6. Click **OK**.

Download a CSV of the Tracker

To download a CSV of the Tracker:

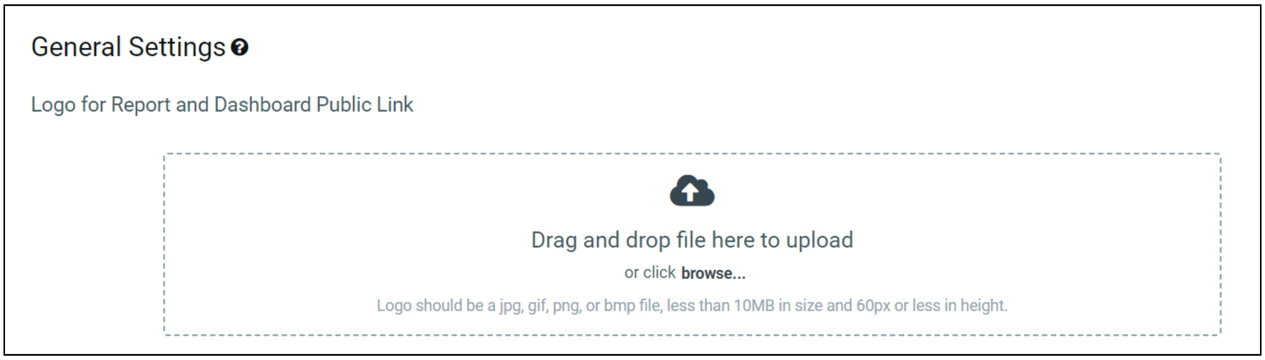
1. From the Tracker Details page, click **Download CSV**. The **Download CSV dialog** appears.
2. Click **OK**.
3. Wait for an email of the generated CSV file.
4. Click the link in the email to access the content.

Critical Event Settings

General Settings

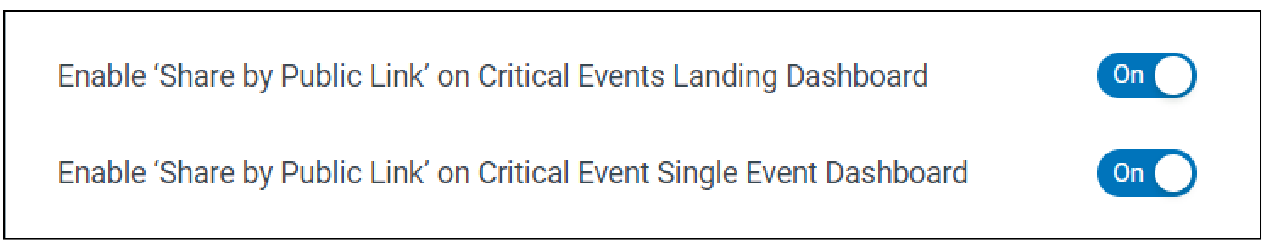
Logo for Report and Dashboard Public Link

You can display a logo for your Situation Report and Dashboard Public Link. To add your logo, from **Settings > Organization > Critical Event > General Settings**, drag and drop your logo onto the field. If you decide to change the logo or remove it altogether, simply click the **X** in the upper left-hand corner of the logo.



Share Public Dashboards

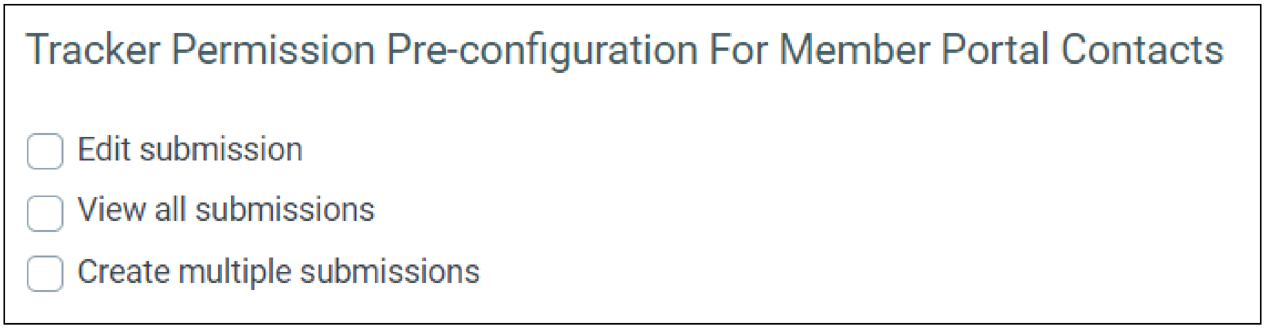
To enable or disable sharing Dashboards (both Landing and Single Event) via a public link, select the **Enable Share by Public Link on Critical Events Landing Dashboard** or **Enable Share by Public Link on Critical Event Single Dashboard**, respectively.



Tracker Permission Pre-configuration For Member Portal Contacts

The following Tracker permissions can be pre-configured for Member Portal contacts by selecting the checkboxes:

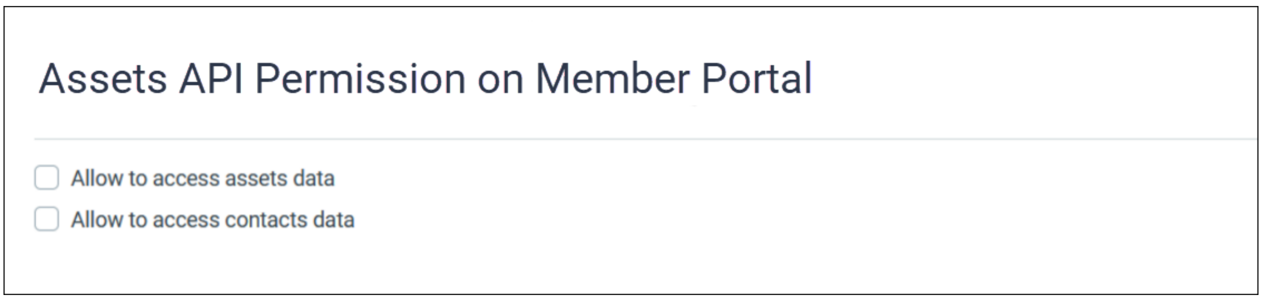
- Edit Submission
- View all submissions
- Create multiple submissions



Assets API Permission on Member Portal

If configured, you can also select the desired checkboxes on this page to allow Assets API permission on the Member Portal:

- Allow access to assets data
- Allow access to contact data

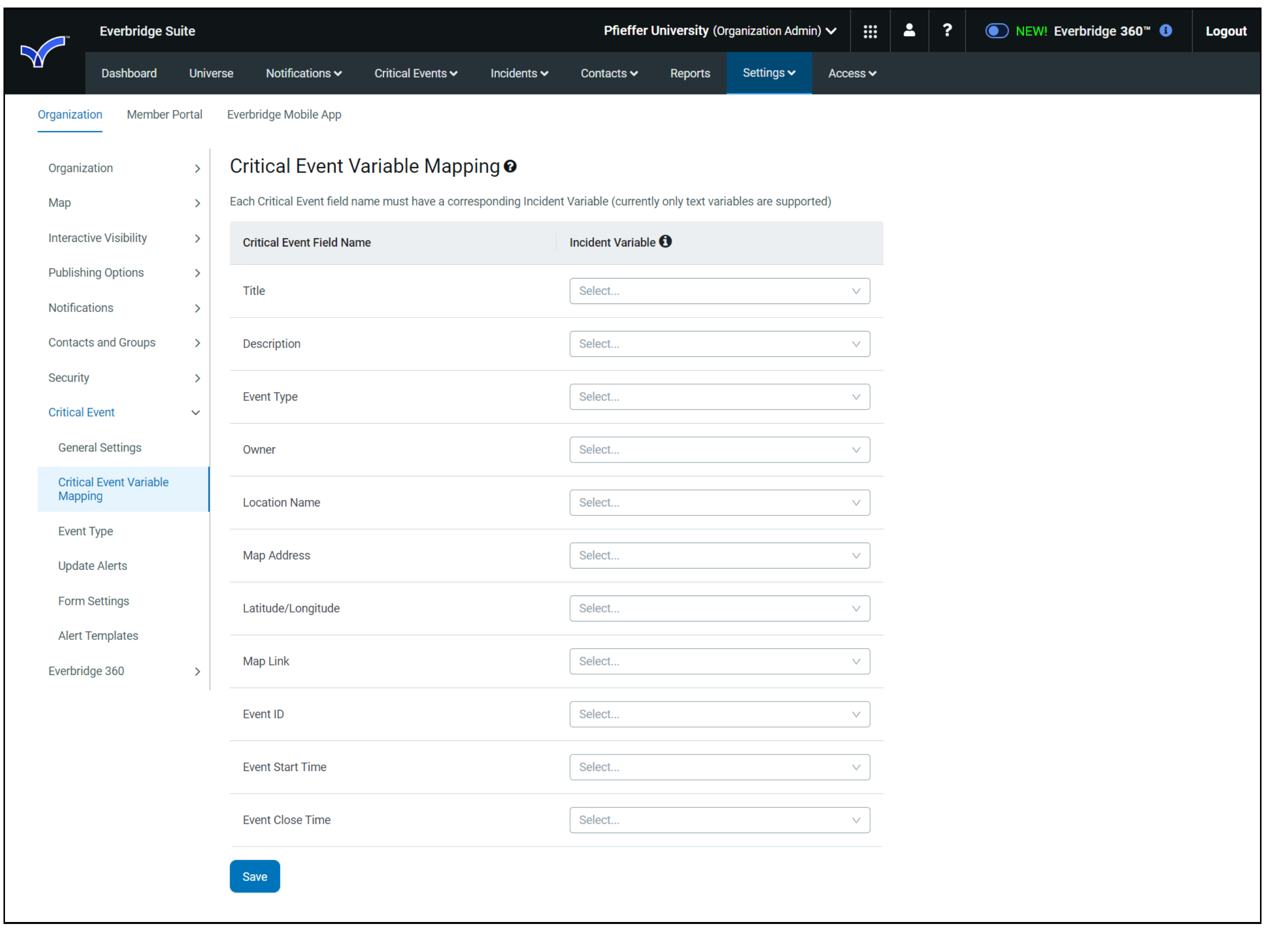


Variable Mappings

You can create Critical Event Variable Mappings from **Settings** > **Critical Event** > **Critical Event Variable Mapping**. Each Critical Event field name must have a corresponding Incident Variable. Click **Save** when done.

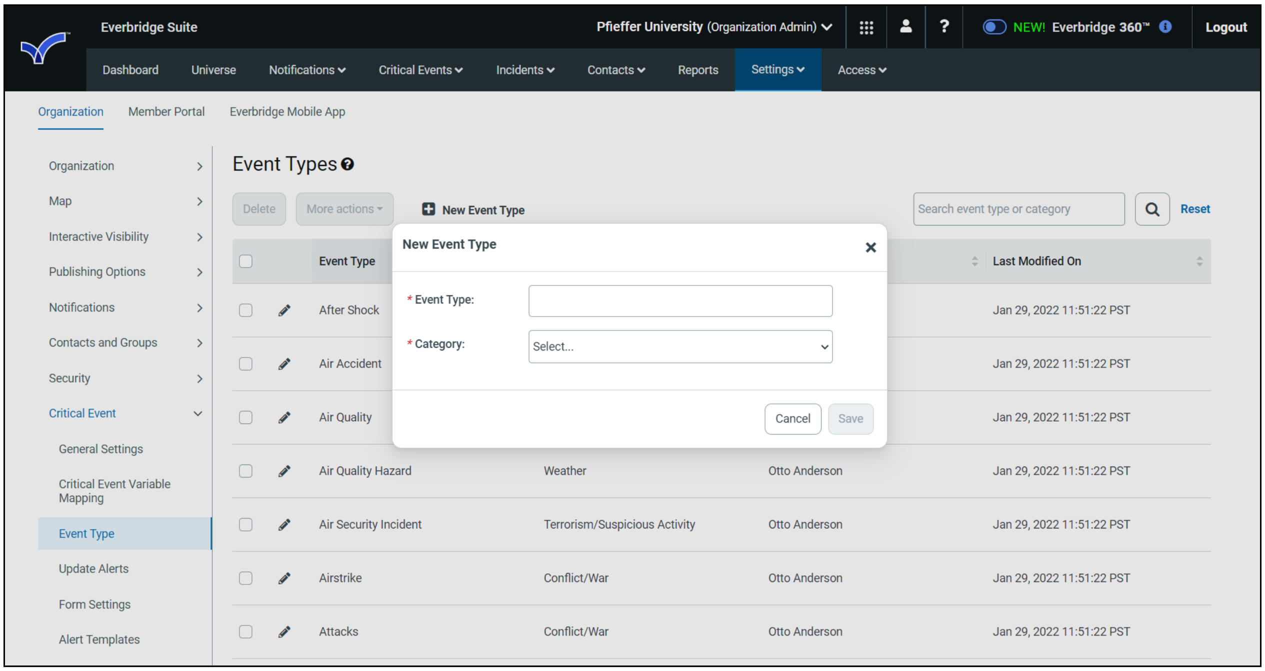
This is to support the auto-launch capability. If an Incident Template has different required fields in the form, those variables must be filled in before launch. The mapping below helps the user to automatically fill in the values for those required variables.

If the intended Incident Template has required fields, and the Variable Mapping is not set up so that those variables have values, the auto-launch will fail. So, when the event is launched and the Incident Template still has the 'Launch' button, this means that the Incident Template is not launched.



Event Types

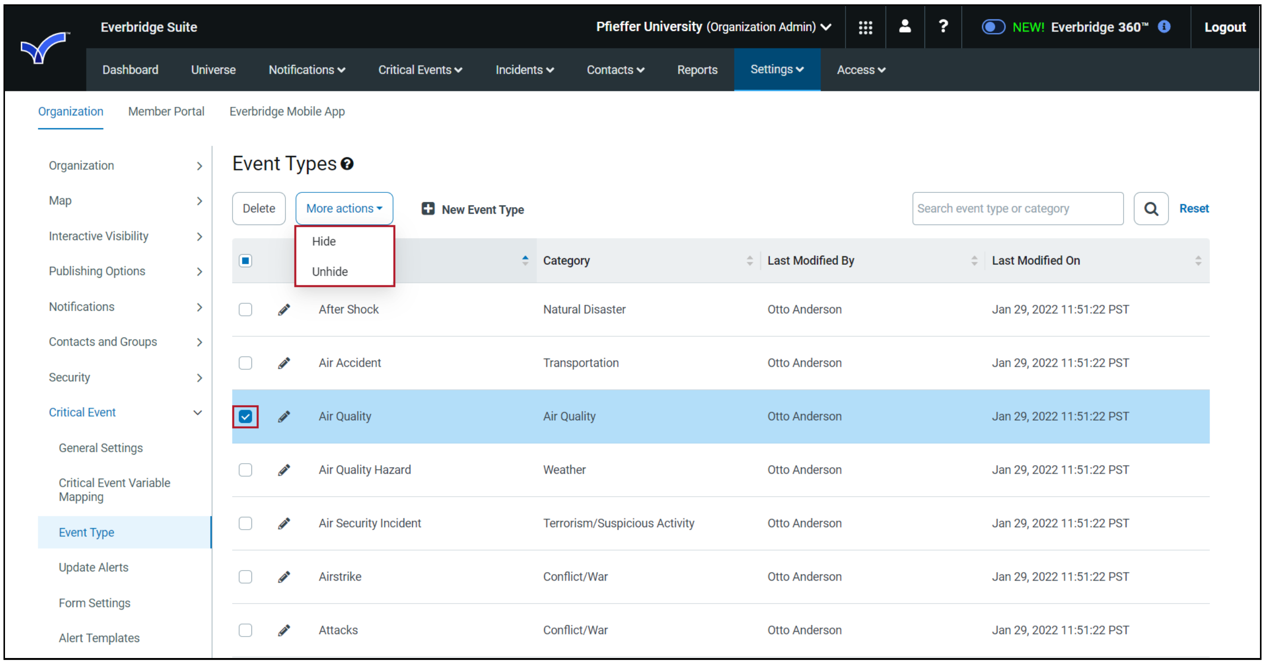
Here, you can see all of the Event Types and their respective Category names for your Organization. In addition, you can add custom Event Types. Click **New Event Type**, then type an Event Type name and select the Category from the drop-down list. Click **Save**.



You can create your own Event Types from the **Settings** tab. There are different potential actions to take:

- **Hide/Unhide**—From the Settings tab, the Event Type List directly corresponds to the ones shown on the Event Template. If you do not want some of the items to show, then you can hide them from that list.
- **Delete**—If you do not like the Event Types provided by Everbridge and want to start fresh, you can delete all or some of the Event Types from the list. However, know that it is not a physical purge.
- When you create a new Event Type, if that has been a part of the Everbridge Default List, then the system prompts you to use the default although you have deleted that entry. For example, if you delete “Earthquake” from the default list, then start to create “Earthquake”, the system automatically prompts one for you to choose.
- **Category**—A Category must be selected. Due to integration with various data sources, the Category must be selected from the Default Everbridge Category List. Even if you create a new Category, it must be linked to an Everbridge Category.

Also, in the case of a deletion, if you create a new Category that previously existed in the Default Everbridge Event Type List, the Default Category classification will also be used.



The following table contains the Default Everbridge Event Types and Categories.

Event Type	Category
After Shock	Natural Disaster
Air Accident	Transportation
Air Quality	Air Quality
Air Quality Hazard	Weather
Air Security Incident	Terrorism/Suspicious Activity
Airstrike	Conflict/War
Attacks	Conflict/War
Avalanche	Local Disaster
Bacteria	Health/Disease
Biological Threat	Health/Disease

Bird Infestation	Health/Disease
Blizzard	Weather
Bomb Detected	Terrorism/Suspicious Activity
Bomb Explosion	Terrorism/Suspicious Activity
Bomb Threat	Terrorism/Suspicious Activity
Brush Fire	HAZMAT/Fire
Carjacking	Crime
Chemical Spill	HAZMAT/Fire
Civil Arrest	Civil Unrest
Civil Demonstration	Civil Unrest
Civil Displaced Population	Civil Unrest
Civil Rioting	Civil Unrest
Civil Unrest	Civil Unrest
Conflict/War	Conflict/War
Corrosive Material	HAZMAT/Fire
Coup	Conflict/War
Crime	Crime
Curfew	Other Security
Cyber Attack	Other Security
Declaration of War	Conflict/War
Disease Outbreak	Health/Disease

Drinking Water	Utility/Infrastructure
Drizzle	Weather
Drought	Weather
Dust Storm	Weather
Earthquake	Earthquake
Election	Other Security
Emergency Landing	Transportation
Emergency Law	Other Security
Extreme Temperature	Weather
Facility	Facility
Flammable Liquid	HAZMAT/Fire
Flammable Gas	HAZMAT/Fire
Flammable Solid	HAZMAT/Fire
Flash Flood	Weather
Flight Delay	Transportation
Flight Disruption	Transportation
Flight Diverted	Transportation
Flood	Flood
Fog	Weather
Frost & Freeze	Frost & Freeze
Fungi	Health/Disease
Gas Outage	Utility/Infrastructure

HAZMAT/Fire	HAZMAT/Fire
Hail	Weather
Hazardous Materials	HAZMAT/Fire
Health/Disease	Health/Disease
Heat	Heat
Heightened Security	Other Security
High Wind	Weather
Hostage	Crime
Hot Spot	HAZMAT/Fire
Hurricane	Hurricane
IT Incident	IT Incident
Ice	Weather
Industrial Action	Civil Unrest
Insect Infestation	Health/Disease
Inversion	Weather
Kidnap	Crime
Landslide	Local Disaster
Local Disaster	Local Disaster
Looting	Crime
Malware Attack	Other Security
Marine & Coastal	Marine & Coastal
Marine Accident	Transportation

Marine Security Incident	Terrorism/Suspicious Activity
Maritime Disruption	Transportation
Microbial Infestation	Health/Disease
Military Engagement	Conflict/War
Military Exercise	Other Security
Mobile Safety	Mobile Safety
Multi-national Military Exercise	Other Security
Municipal Water Management	Utility/Infrastructure
Natural Disaster	Natural Disaster
Non-Flammable Gas	HAZMAT/Fire
Non-Residentail Fire	HAZMAT/Fire
Organic Peroxides	HAZMAT/Fire
Other	Other
Other Security	Other Security
Other Weather	Other Weather
Oxidizers	HAZMAT/Fire
Phishing Site	Other Secuity
Poisoning	Health/Disease
Police/Security Forces Response	Crime
Political Controversy	Civil Unrest

Politically Motivated Assassination	Conflict/War
Power Outage	Utility/Infrastructure
Product Recall	Other
Protozoa	Health/Disease
Radioactive Materials	HAZMAT/Fire
Rail Accident	Transportation
Rail Disruption	Transportation
Rail Security Incident	Terrorism/Suspicious Activity
Rain	Weather
Ransom	Crime
Reptile Infestation	Health/Disease
Residential Fire	HAZMAT/Fire
Road Disruption	Transportation
Robbery	Crime
Rodent Infestation	Health/Disease
School Fire	HAZMAT/Fire
Secession Declaration	Conflict/War
Sewage Outage	Utility/Infrastructure
Shooting	Crime
Snow	Weather
Social Clashes	Conflict/War

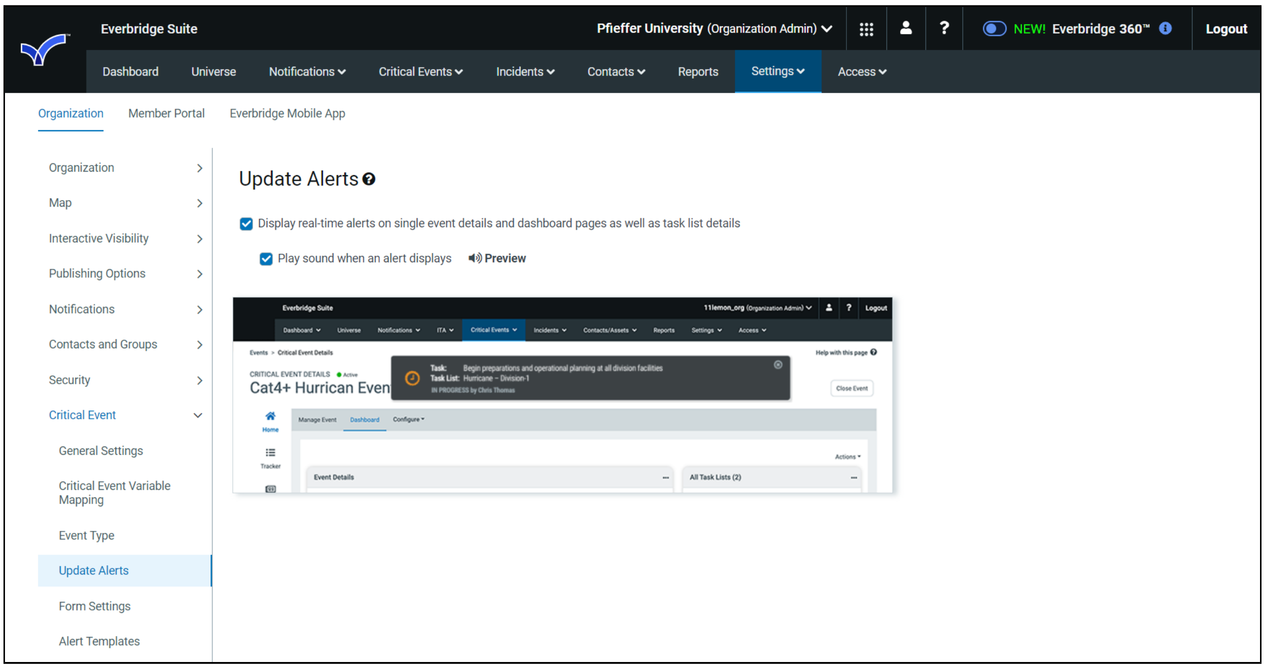
Special Needs Fire	HAZMAT/Fire
Spontaneously Combustible	HAZMAT/Fire
Stabbing	Crime
State of Emergency	Other Security
Structure Collapse	Local Disaster
Subsidence	Local Disaster
Suspicious Activity	Terrorism/Suspicious Activity
Suspicious Object	Terrorism/Suspicious Activity
Suspicious Substance	Terrorism/Suspicious Activity
Telecommunications	Utility/Infrastructure
Terrorism/Suspicious Activity	Terrorism/Suspicious Activity
Thunderstorm	Thunderstorm
Tornado	Tornado
Toxic Gas	HAZMAT/Fire
Toxic and Infectious	HAZMAT/Fire
Transportation	Transportation
Travel Warnings	Other Security
Tropical Cyclone	Natural Disaster
Tropical Storm	Tropical Storm
Tsunami	Natural Disaster

Unexploded Ordinance	HAZMAT/Fire
Utility/Infrastructure	Utility/Infrastructure
Vehicle Accident	Transportation
Violent Activity Threat	Crime
Virus	Health/Disease
Volcanic Eruption	Natural Disaster
Water Main Break	Utility/Infrastructure
Wildfire	Wildfire
Wind	Wind
Winter Storm	Weather
Winter Weather	Winter Weather

Update Alerts

Update Alerts is a feature that generates additional pop-up alerts in the Manager Portal for all users whenever new Critical Event notifications and Tasks are created. Click the checkbox to toggle on Update Alerts from **Settings > Critical Events > Update Alerts**.

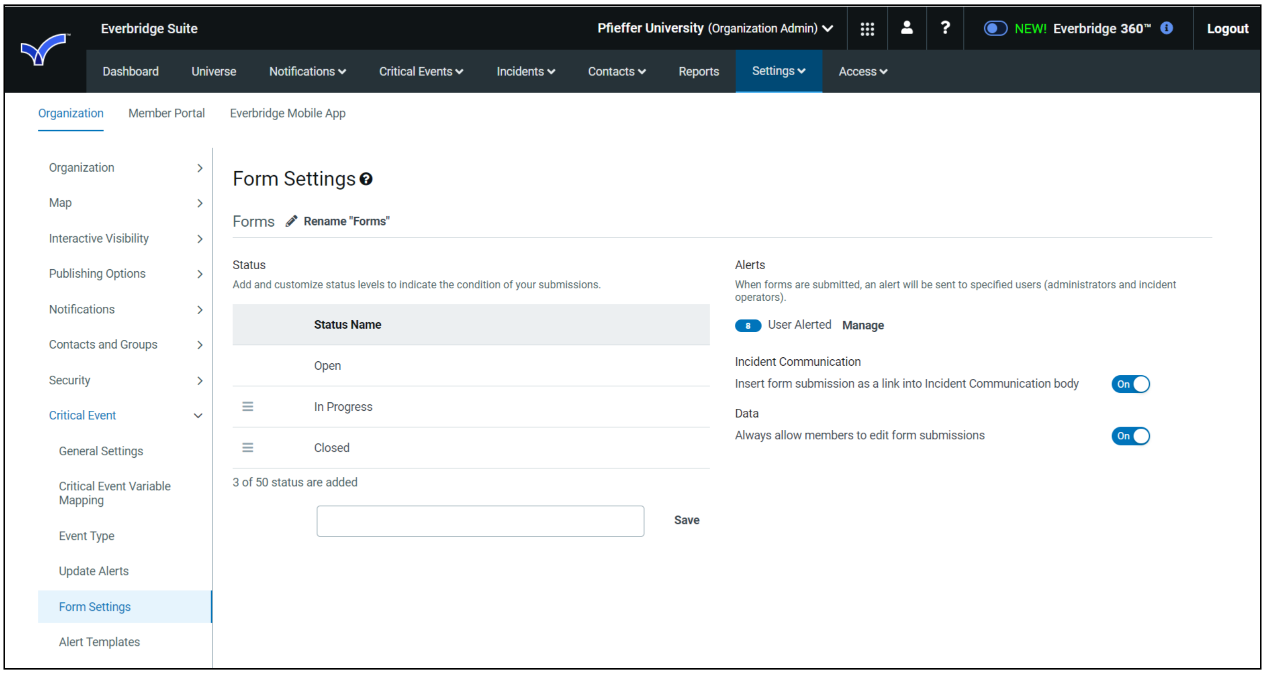
- Select the **play sound** checkbox to pair an audio cue with these alerts.



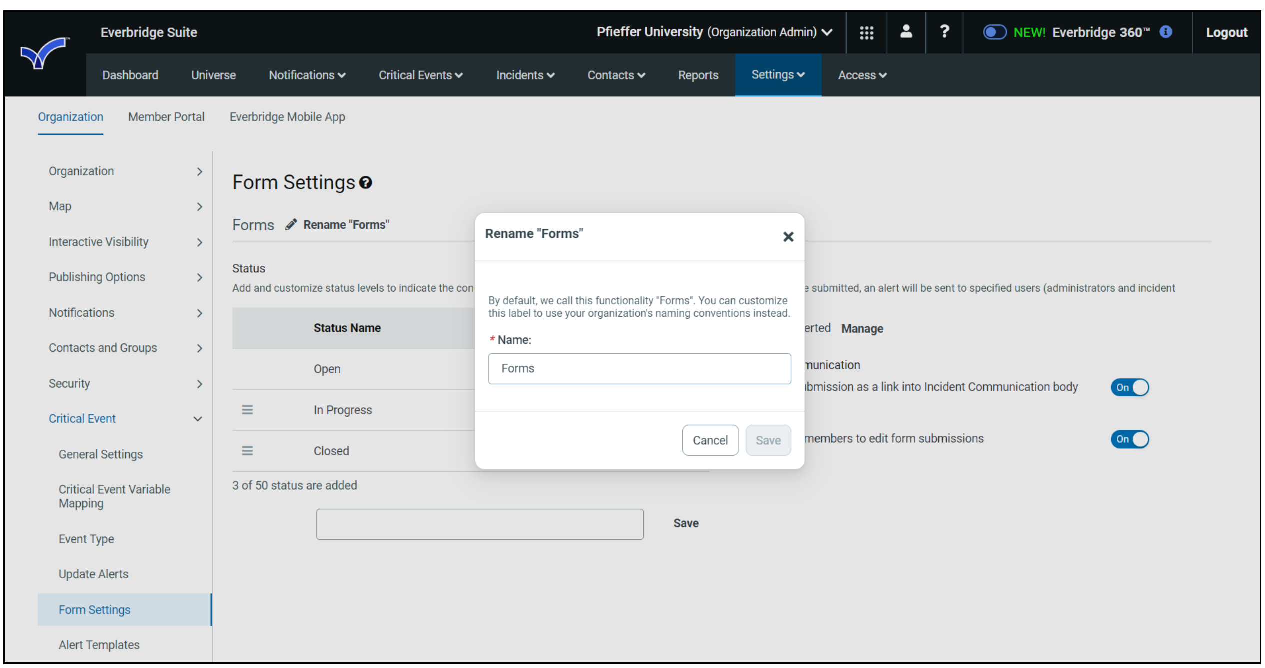
For more details, see [Real-time Updates](#).

Form Setting

Use the **Form Settings** page to add and customize status levels to indicate the condition of your requests.



By default, this functionality is called **Forms**. You can rename this label according to your Organization's naming conventions. Click the Pencil icon and a dialog is displayed. Change the name and click **Save**.

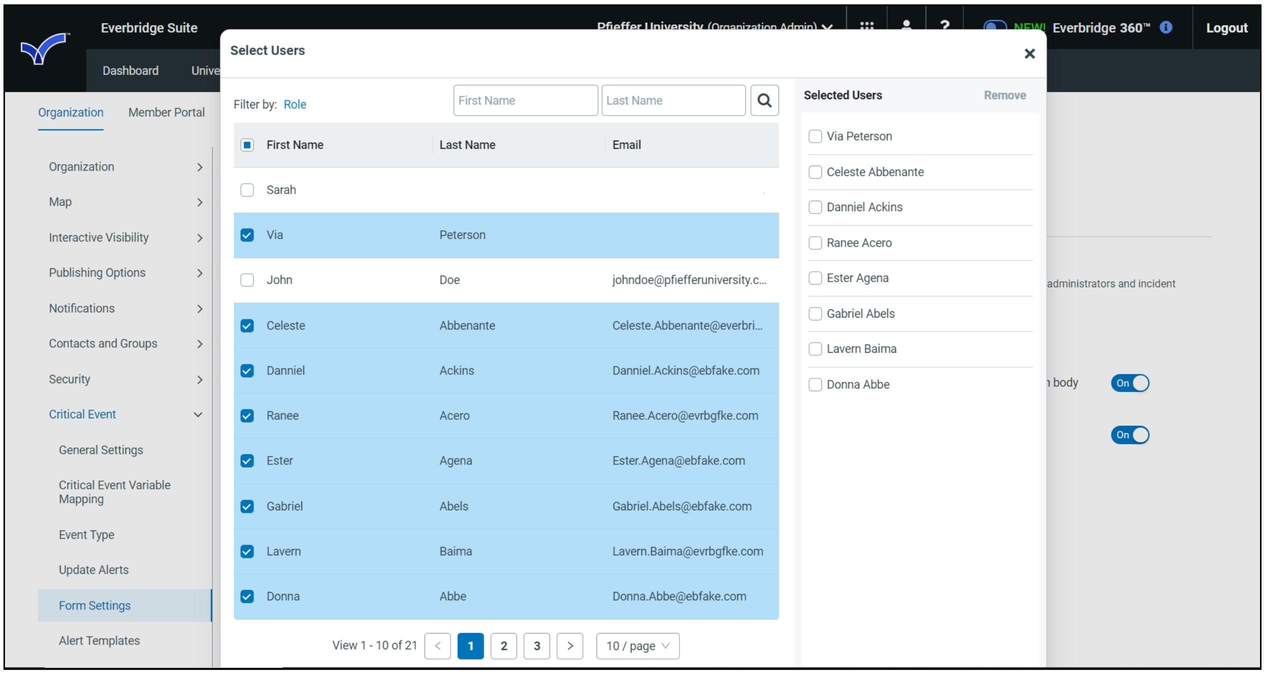


In addition, you can add up to 50 Status levels. Type a new status level in the field at the bottom of the **Form Settings** page, then click **Save**.

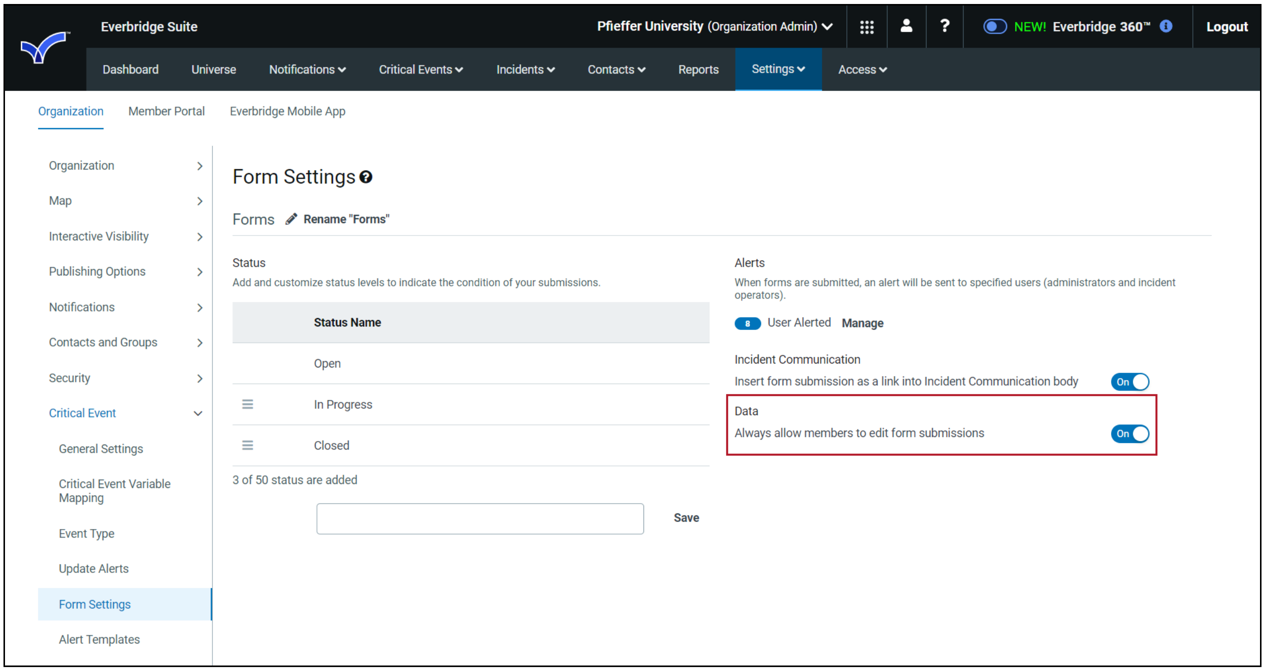
Lastly, when requests are created or updated, an alert will be sent to specified users.

In the **Alerts** section of the page:

- If there are no specified users, click the button: Select Users to Receive Alert.
- If there are specified users, click **Manage**. The Select Users dialog appears. Select the check boxes of the users to receive the alerts, then click **Save**.



From **Data**, toggle on the **Always allow members of edit request submissions** option to allow members of your Member Portal to edit request submissions.

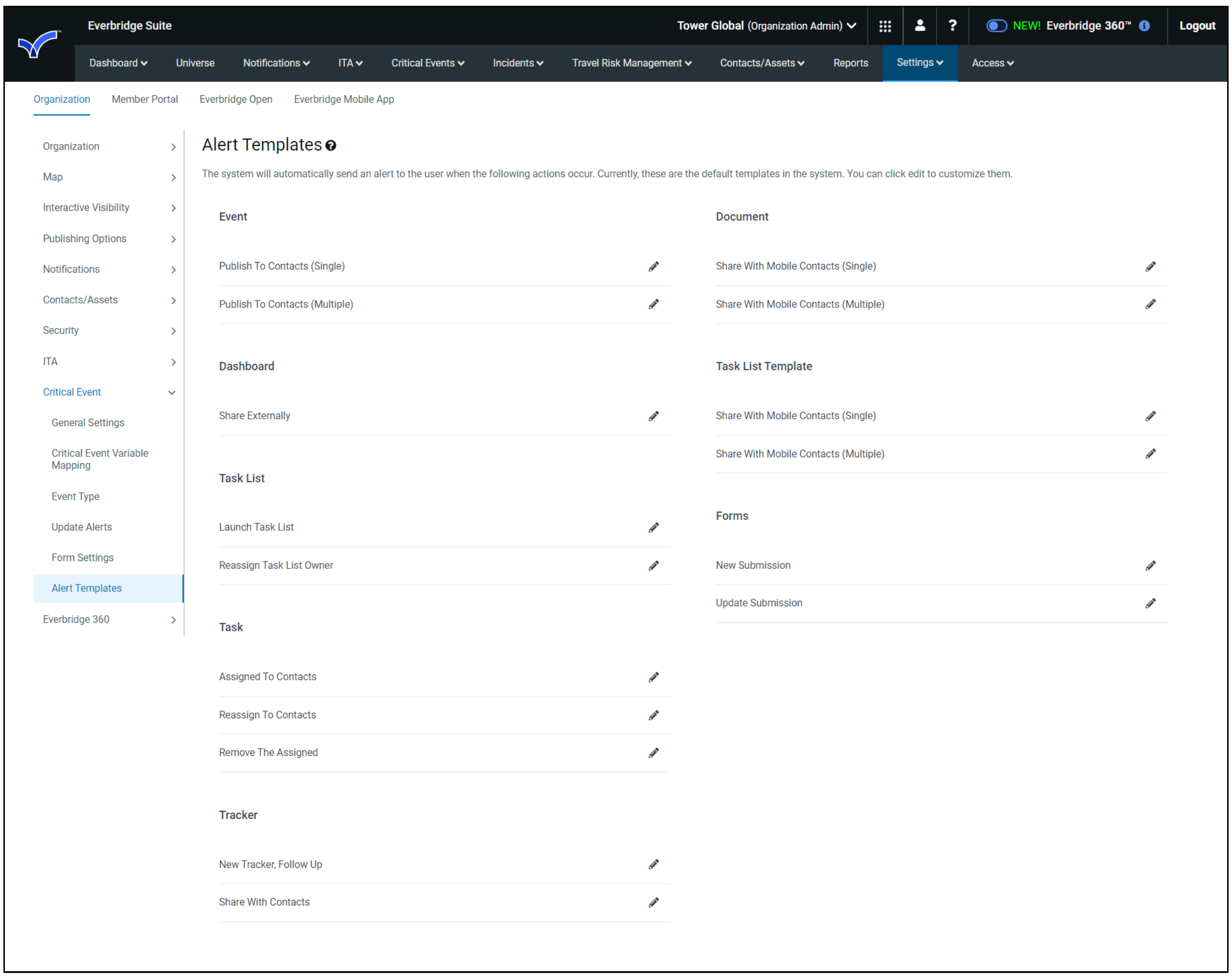

Everbridge Suite
Pfieffer University (Organization Admin)
NEW! Everbridge 360™
Logout
Dashboard
Universe
Notifications
Critical Events
Incidents
Contacts
Reports
Settings
Access
Organization
Member Portal
Everbridge Mobile App
Organization
Map
Interactive Visibility
Publishing Options
Notifications
Contacts and Groups
Security
Critical Event
General Settings
Critical Event Variable Mapping
Event Type
Update Alerts
Form Settings
Alert Templates
Form Settings
Forms
Rename "Forms"
Status
Add and customize status levels to indicate the condition of your submissions.
Status Name
Open
In Progress
Closed
3 of 50 status are added
Save
Alerts
When forms are submitted, an alert will be sent to specified users (administrators and incident operators).
User Alerted
Manage
Incident Communication
Insert form submission as a link into Incident Communication body
On
Data
Always allow members to edit form submissions
On

Alert Templates

You can customize your automatic action alert content in Crisis Management at **Settings > Crisis Management > Alert Templates.**

These settings allow you to:

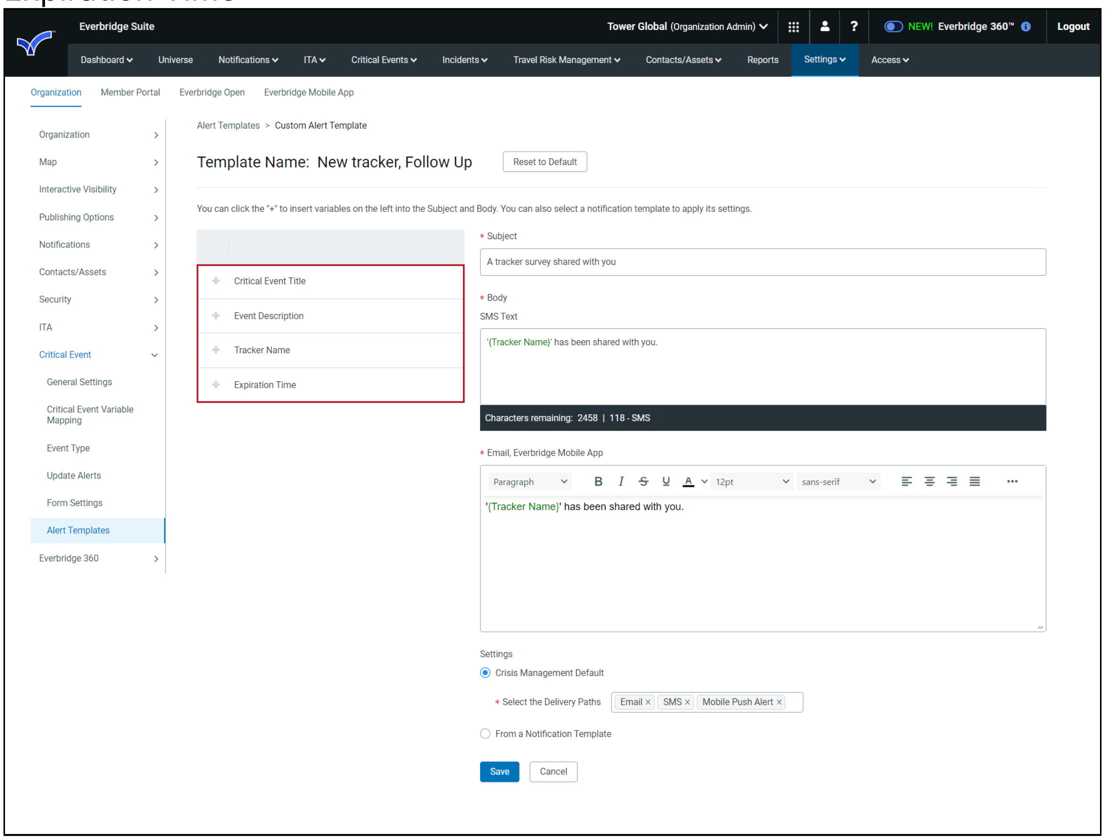
- Customize your automated messages to be more appropriate for your audience.
- Modify delivery paths of notifications.
- Assign and reassign tasks.
- Create and update requests.



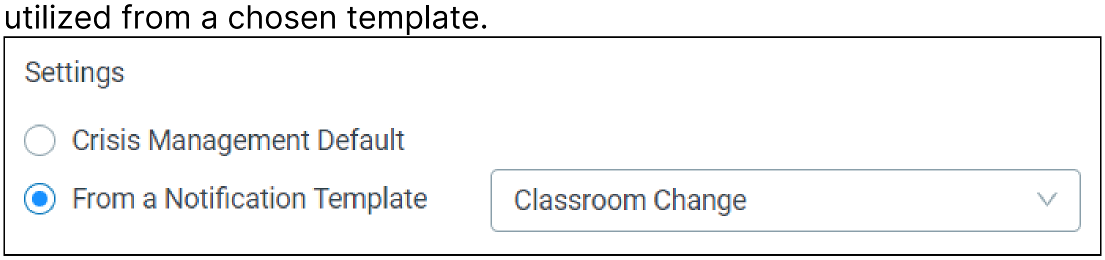
To customize an Alert Template:

1. Click on the **pencil** icon next to the desired template. The **Custom Alert Template** page opens.

2. Start adding variables by first clicking on the applicable text field, and then selecting the **plus** icon next to the desired variable. In the **Tracker Alert Template** example below, we have the following variables to choose from:
   - Critical Event Title
   - Event Description
   - Tracker Name
   - Expiration Time

   The added variables will be displayed in the green text where they were inserted within the text field.
3. Select one of two Settings options:
   - **Crisis Management Default**
   - **From a Notification Template**. Choose this option if you'd like Notification settings (delivery methods, sender email display, etc.) to be utilized from a chosen template.

4. Once satisfied, click **Save**.

NOTE: If you'd like to recreate a template from scratch, select **Reset to Default** near the template name.

Creating a Critical Event Template

You can create a Critical Event (CE) ad hoc or include a Critical Event Template. You can see the status and details of existing Critical Event Templates from the **Critical Event Templates** subtab. View the template details by clicking the template name.

To edit a Critical Event Template, click the **Pencil** icon of the desired Critical Event Template.

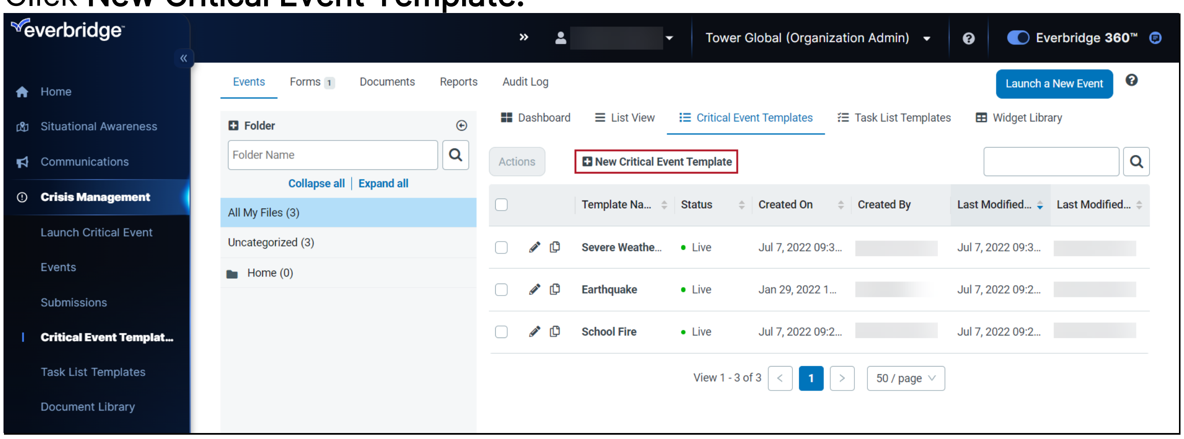
You can also move the individual files into folders or add subfolders.

To delete a Critical Event template, select the checkbox next to its title, then click **Delete**.

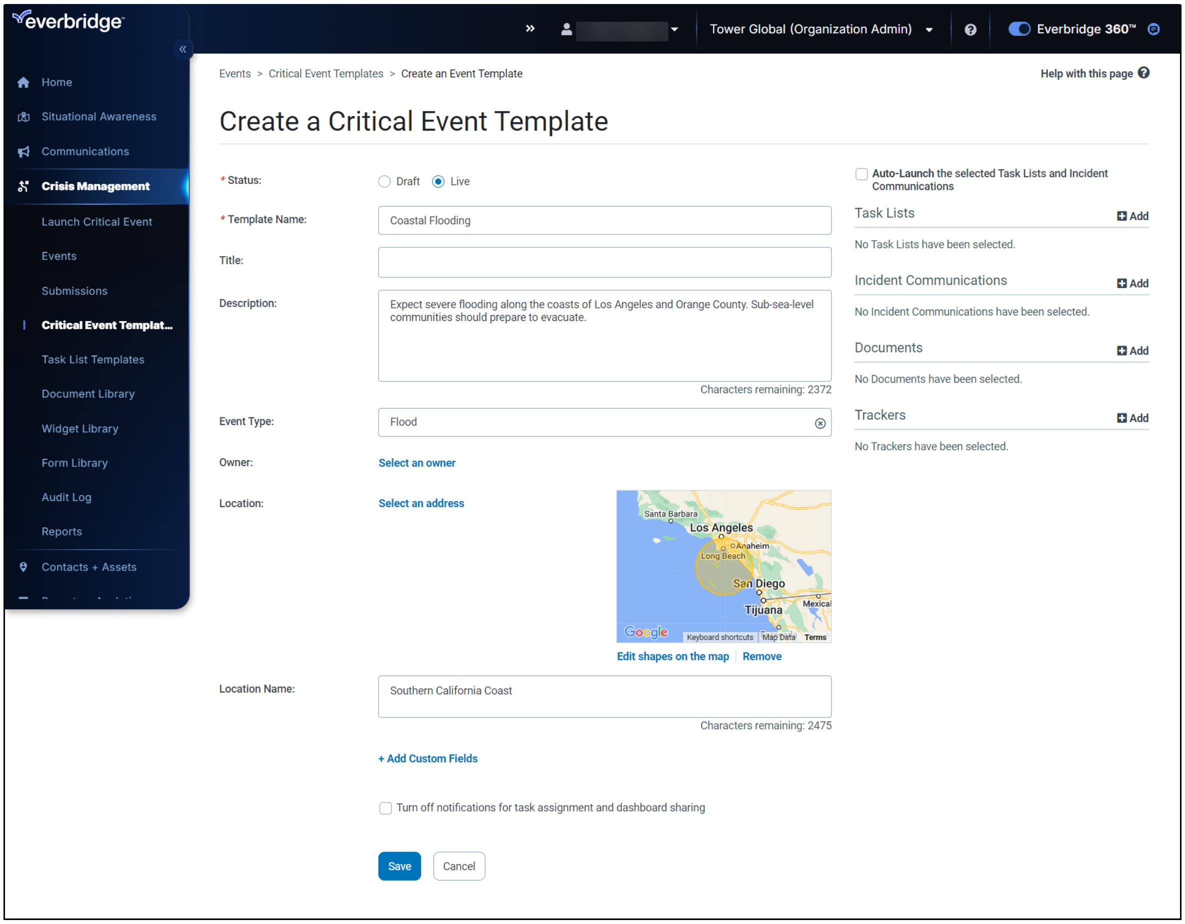
Create a Critical Event Template

To create a new Critical Event Template:

1. Select **Critical Event Templates** from the **Critical Events** tab. The **Critical Event Templates** page appears.
2. Click **New Critical Event Template.**



3. The **Create an Event Template** page appears. If this template should be usable immediately upon creation, set its status to **Live**. If you plan to work on it and return later or collaborate with others, set the status to **Draft**.
   - Note that only Live templates can be selected when launching a Critical Event.
4. Fill in the **Critical Event Template** details accordingly. Required fields have a red asterisk (*). You can fill in the fields now and return later to edit the template when you have additional information.



Refer to the field descriptions below:

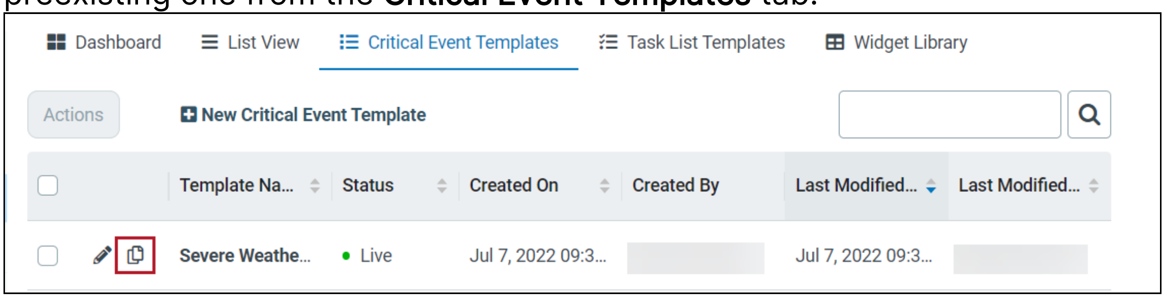
Field	Description
Status*	Set the Status as either **Live** to make it usable immediately after saving, or **Draft** to save it as a draft to return to later.
Template Name*	Enter a unique Template Name (up to 800 characters).
Title	Enter a descriptive Title of the template (up to 800 characters).
Description	Enter a description. Maximum characters: 2500.
Event Type	Select the Event Type from the drop-down list.
Owner	Click the **Select an Owner** link and choose an owner.

Location	Select an address, drag the pin to change location, then click Select This Location. Use shapes on the map. Select a shape from the Select Shapes dialog and place it on your location. Repeat as needed. Then, click Select These Shapes.
Location Name	Enter a Location description. Maximum characters: 2500.
Add Custom Fields	Your template can include your Organization's Incident variables so that the Critical Event is automatically filled in when launched. To add custom fields to the template: 1. Click **Add Custom Fields.** 2. Search and select the checkbox next to the desired Incident variables name(s). 3. If required, select that checkbox as well. 4. Click **Add**. The custom field is added to the bottom of the template. To reorder the custom field, click the Hamburger icon and while holding the mouse, drag the field to its new position. If the custom field was created by mistake, click **X** to delete it.
Folder	When you launch a Critical Event, a folder name can be included in the template. The launched event is placed in the folder. A default folder is presented, but you can change it. If the user has no folder permission, then the event will be placed in the Uncategorized folder.
Turn off Notifications for task assignment and dashboard sharing	Select this checkbox to turn off the Notification when launching the event and dashboard sharing.
Auto-Launch	Select the checkbox to auto-launch the selected task lists and Incident communications.

Task Lists	Click **Add** to add existing task lists. Select the desired checkbox and click **Save**. If already added, you can also delete a task list by clicking the X next to its name.
Incident Communications	Click **Add** to add existing Incident Templates. Select the desired checkbox and click **Save**. If already added, you can also delete an Incident template by clicking the X next to its name.
Documents	Click **Add** to add existing Documents. Select the desired checkbox and click **Save**. If already added, you can also delete a document by clicking the X next to its name.
Trackers	Click **Add** to configure Trackers for this Critical Event Template. See [Adding a Tracker to a Critical Event Template] for details.

5. Click **Save** when done. The new template will now appear in the list view.

NOTE: Critical Event Templates can also be created by copying a preexisting one from the **Critical Event Templates** tab.



The copied Critical Event Template will inherit all of the original configurations and items, like Documents or Trackers, which can then be adjusted as needed before saving the new version.

Insert an Incident Communications Template

An **Incident Communications Template** can also be added to a **Critical Event Template** to include all of the **variables** from the IC Template. This makes launching communications from the Critical Event itself seamless and effortless while saving time spent on manually adding these variables again.

1. Enter the **Add** or **Edit Critical Events Template** pages.
2. Click **Add Custom Fields**.

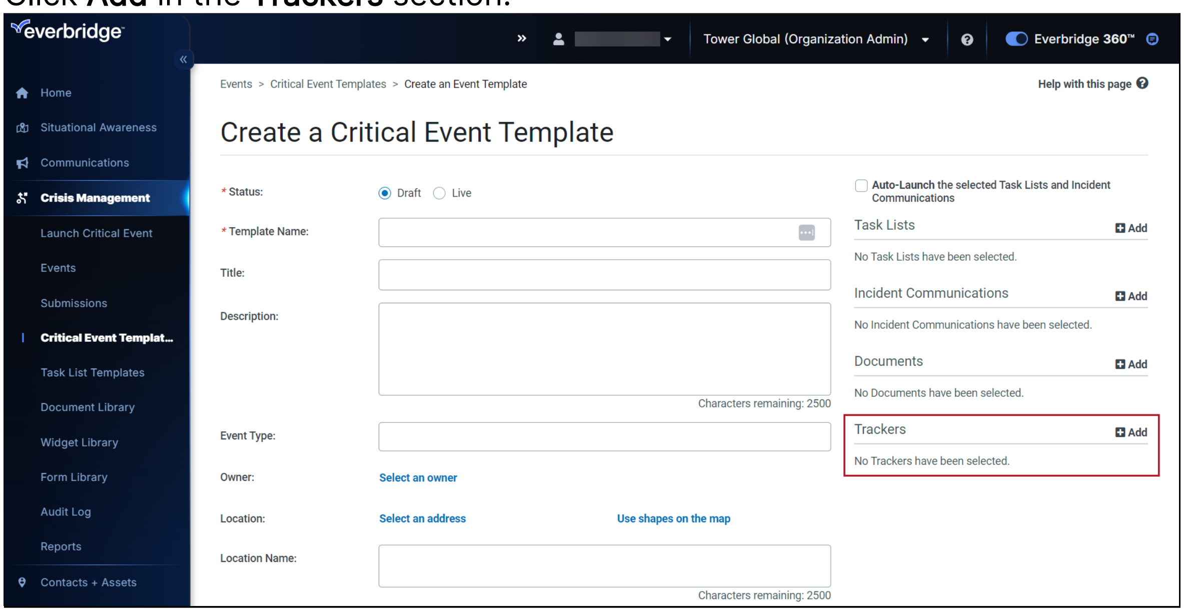
3. The **Add Custom Fields** pop-up menu will appear. Click the **By Incident Templates** header, and then **Select Incident Template**.
4. Check the boxes next to the Incident Templates to include them. Click **Add Selected Templates**.
5. You'll be returned to the **Add Custom Fields** pop-up menu. Check the boxes next to the desired fields from the selected templates, and click **Add**.
6. Once done, the new fields will be included in the Critical Event Template. Finish filling out the template and click **Save**.

Adding a Tracker to a Critical Event Template

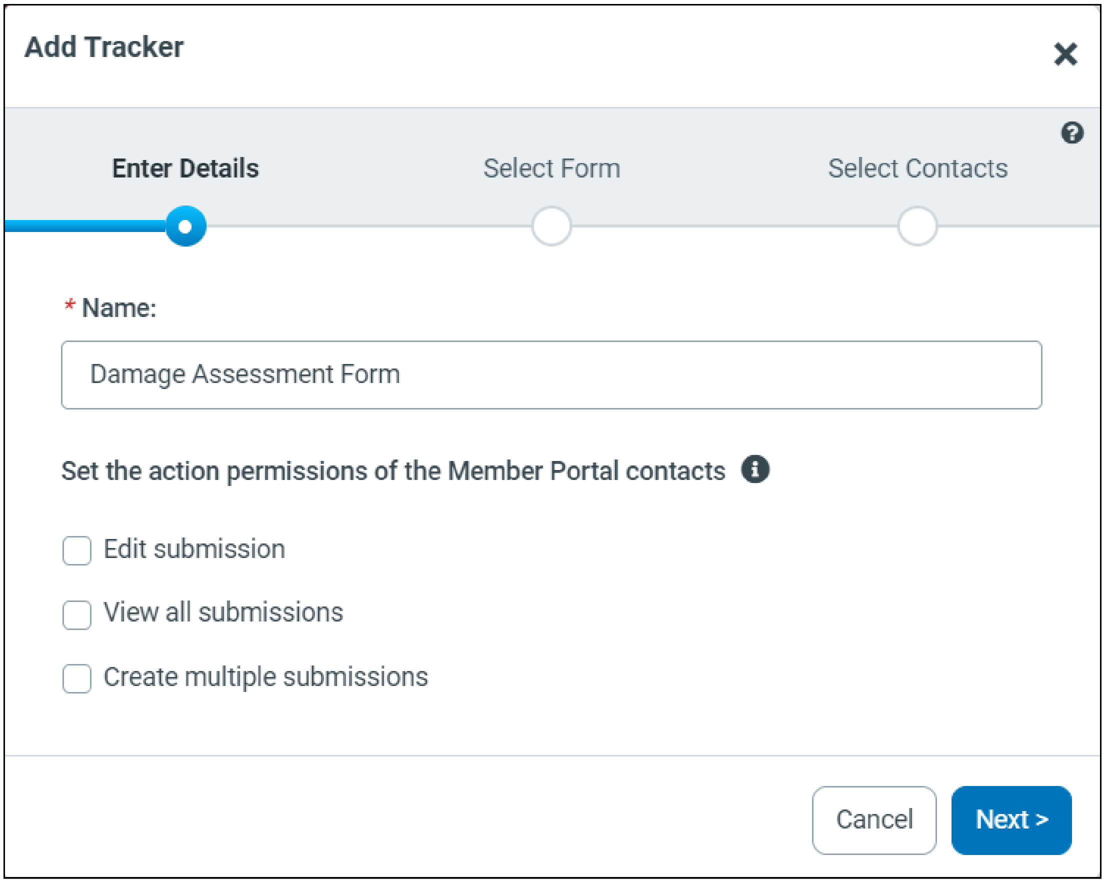
Trackers can also be added to or removed from Critical Event Templates to streamline the future response process before an event occurs. However, remember that launching a Critical Event Template doesn't automatically launch the Tracker. It will be available to launch from the **Trackers** tab of the Critical Event.

To add a Tracker to a Critical Event Template:

1. Depending on the need, navigate to either the **Create an Event Template** or **Update an Event Template**.
2. Click **Add** in the **Trackers** section.

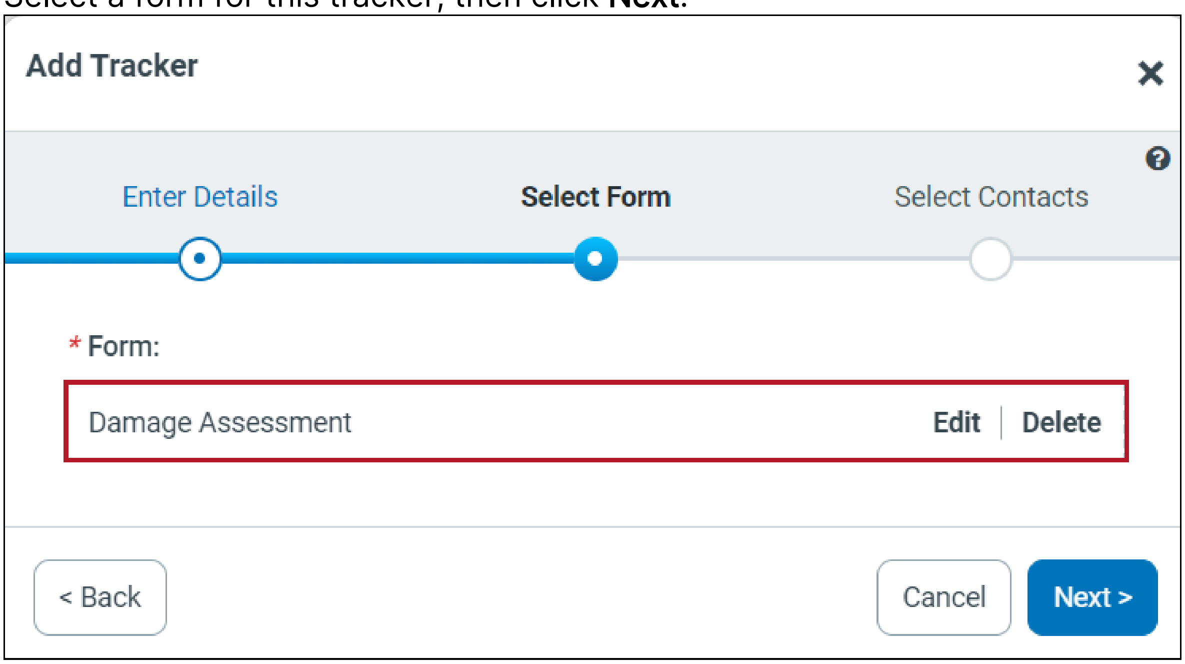


3. Give the tracker a name, and if applicable, set the following permissions for Member Portal contacts:
   - **Edit submission** - Allows changes to tracker answers.
   - **View all submissions** - Enables Members to view each other's submissions.
   - **Create multiple submissions** - Enables Members to submit the tracker multiple times. For example, for the Member and then on behalf of another Member.

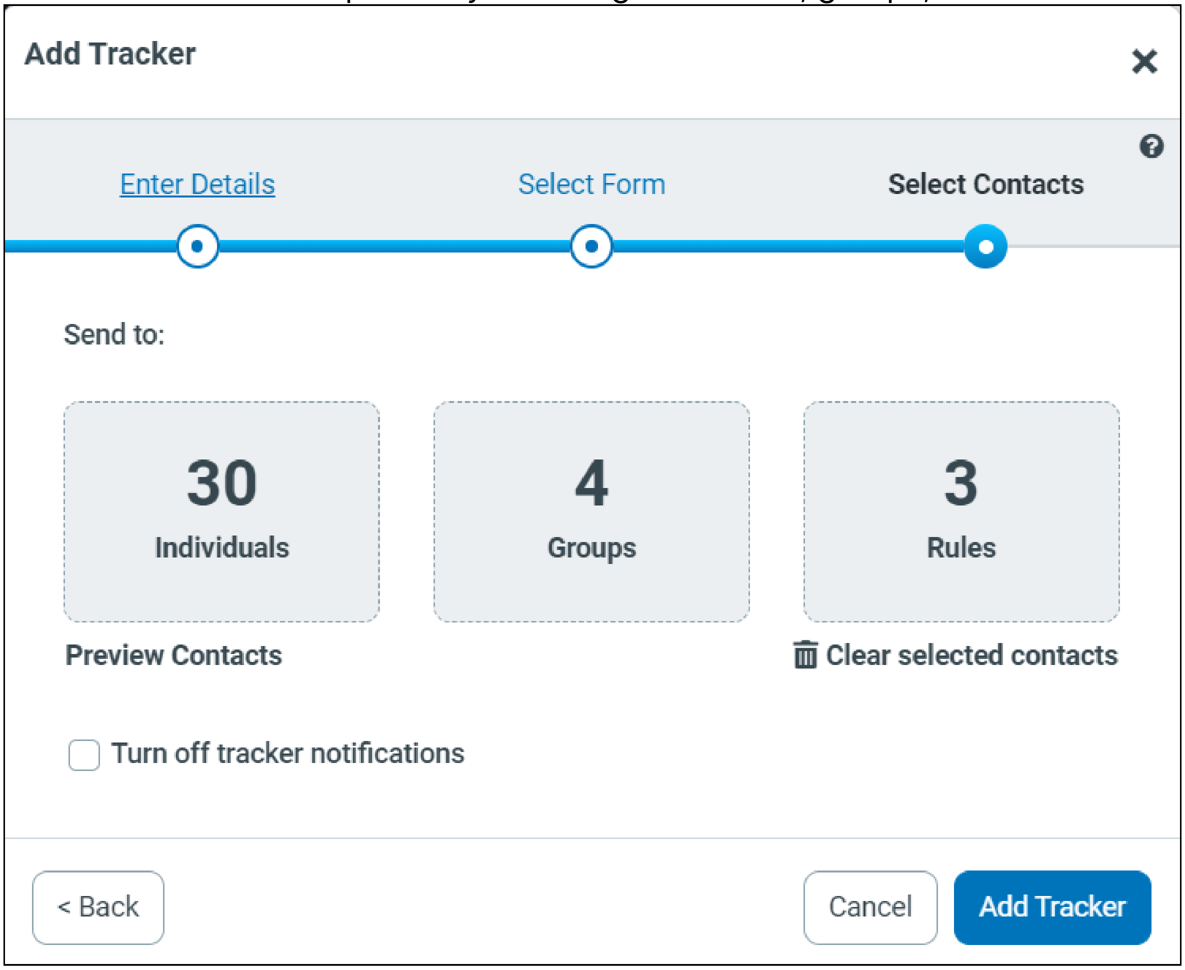


Click **Next**.

4. Select a form for this tracker, then click **Next**.



5. Select the contact recipients by choosing individuals, groups, and/or rules.



- Tracker notifications can be disabled by selecting the **Turn off tracker notifications** checkbox.

6. Click **Add Tracker**.

NOTE: If added to a template, the tracker will be displayed in the **Critical Event Template Export** report.

Update Template

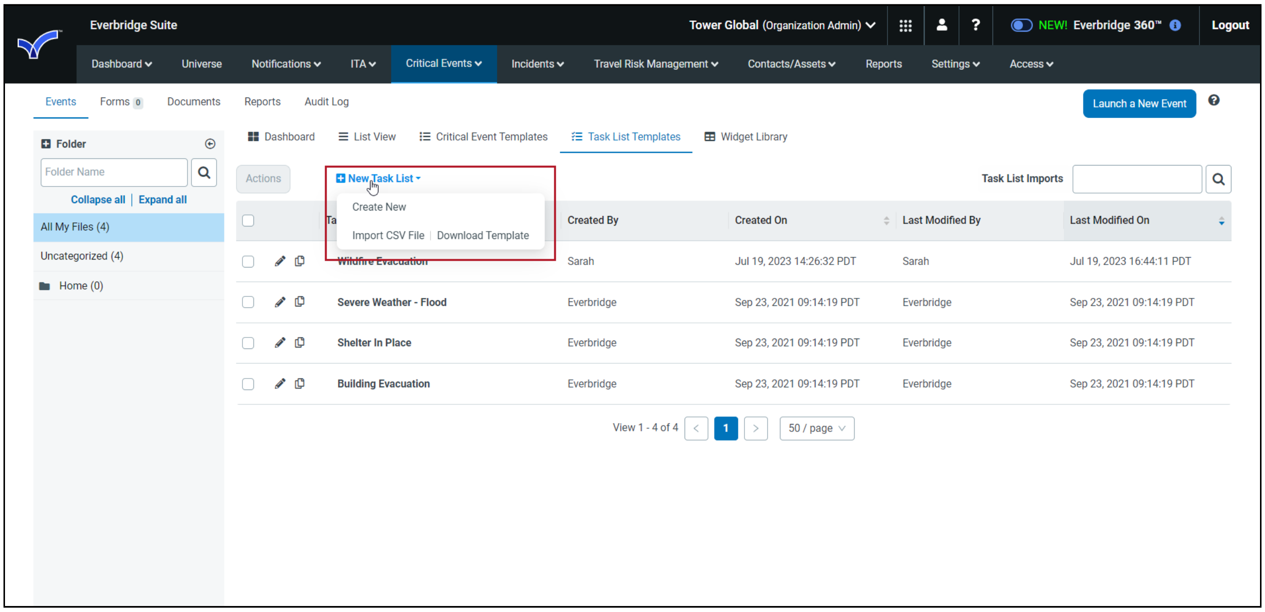
To update a Critical Event Template:

1. From the **Critical Event Templates** sub-tab, click the Pencil icon of the template you want to edit. The **Update Critical Event Template** dialog appears.
2. Edit the details as needed.
3. Click **Save**.

Creating a Task List Template

Create Task Lists from the **Task List Templates** subtab. Each task item is a line of its own, with an owner and any documents you want to associate with the task.

You can edit an existing Task List, copy a Task List Template, delete a task item from a task list, or delete the task list altogether.



Create a Task List from a Task List Template

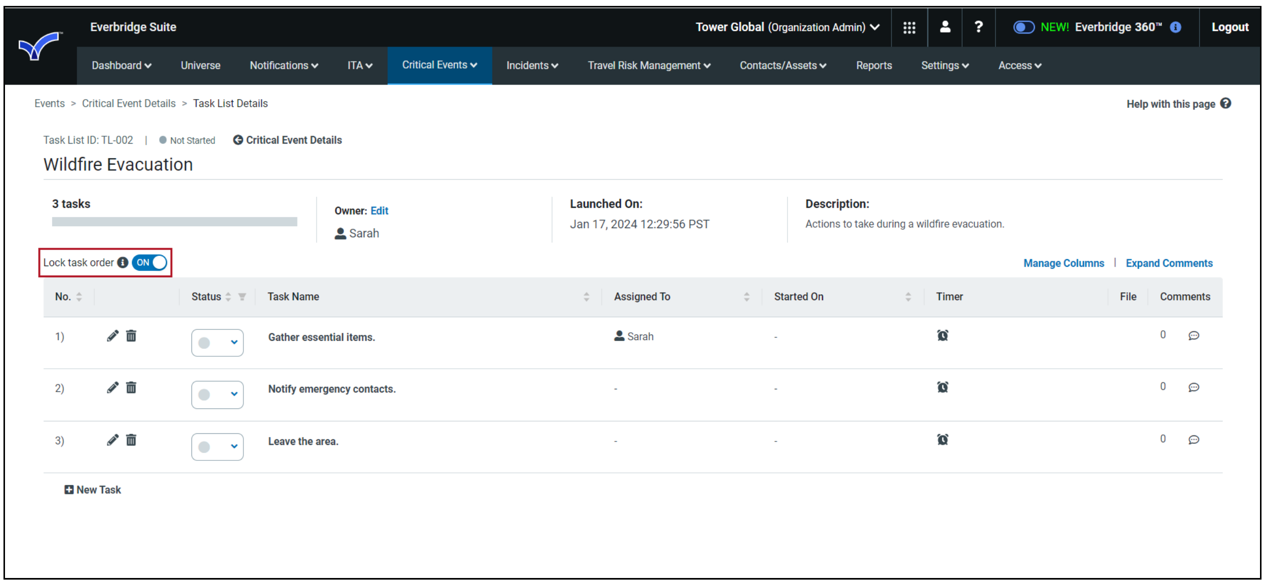
To create a task list from the Task List Template:

1. From the **Critical Events** tab, select the **Task List Templates** subtab.
2. Click the **New Task List** menu.
3. Select **Create New**. The **New Task List** page appears.
4. Fill in the fields accordingly and click **Save.**
    - Required fields have a red asterisk (*).
    - You can fill in fields now and return later to edit the template when you have additional information.

Field Name	Description
Title	Type a descriptive Title for the template. • Can be up to 800 characters.
Description	Type a description.

Owner	Click the **Select an Owner** link, choose an owner, then click **Select**. • Or, click **Multiple Tasks** to assign an owner to multiple tasks at once, select the desired tasks, then click **OK**. • For details, see the Select an Owner procedure.
Add a New Task List Item	Click **Add** to add a new task item. The task is automatically numbered. • You can select an **Owner** and add a Document. • You can set a timer that will automatically start once the task list is launched. • You can also delete an existing task.

Account and Organization Administrators can lock the order of the items on a launched Task List to prevent them from being rearranged by other users.

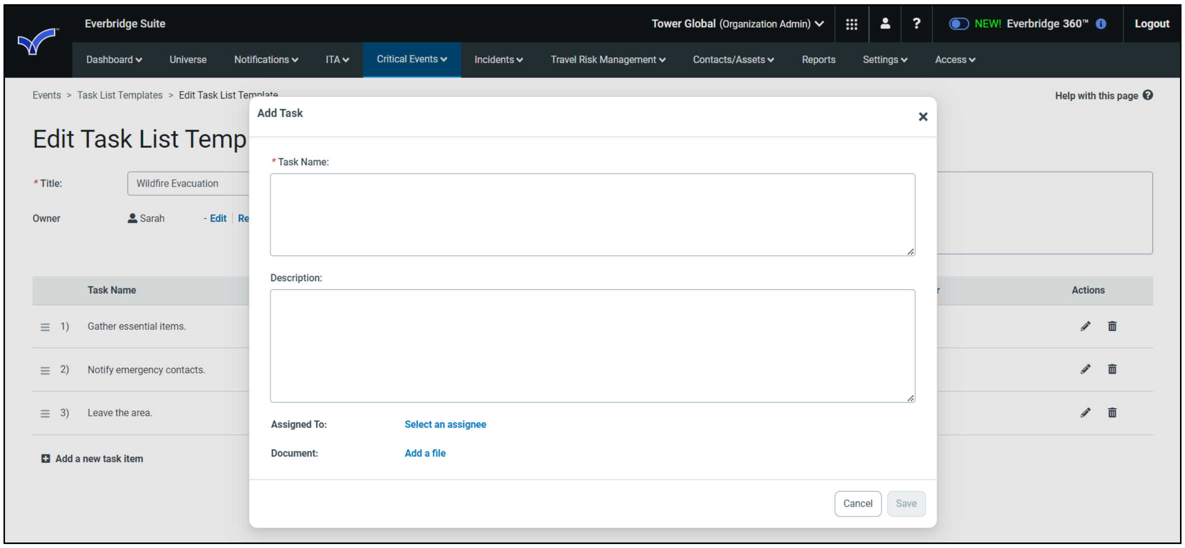


Create a New Task

Once the Task List has been created, it's time to add the individual **Tasks** to be completed. Select **New Task Item** to begin. This will open the **Add Task** modal, which includes the following fields and data points:

- Task Name
- Description
- Assigned To

- Document



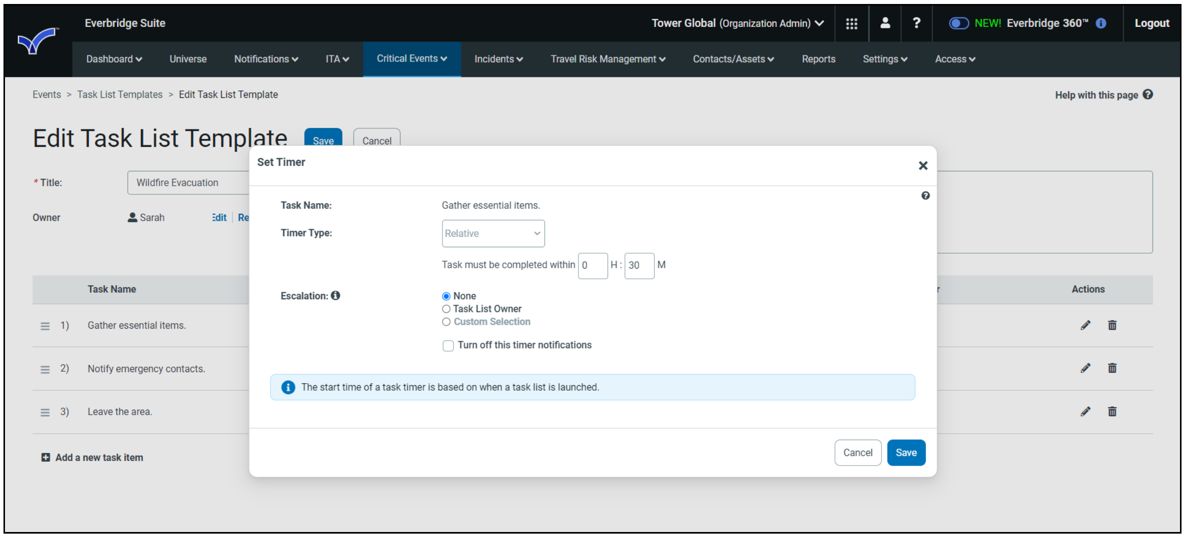
Select **Save** to continue, and you'll then see the new Task populated on the Task List.

Create a Task Timer

Since time is of the essence during any Critical Event, creating a **Timer** for each Task in a Task List can help save vital time when it matters the most.

This can be done by selecting the **Timer Icon** on the desired task within the Task List. The **Set Timer** popup will appear with the following data points:

- Task Name
- Timer Type
- Timer Duration
- Escalation point of contact. This person will be alerted if the task isn't completed before the timer expires.



Select **Save** to continue once you've made your selections. Remember that the Timer will begin counting down as soon as the Task List is launched.

Download Task List Template

> **NOTE:** The standard Task List Template is an empty CSV-format file that allows you to enter task list and task item information, then upload it back into the system. The file contains brief instructions on what each heading means. The required columns are: **Task List Title**, **Task List Description**, and **Task Item Name**.

To download the standard Task List Template:

1. From the **Critical Events** tab, select the **Task List Templates** subtab.
2. Click the **New Task List** drop-down list.
3. Click **Download Template**.
4. The **template_crisisTaskList.csv** is downloaded from which you can enter the required and optional fields.
    - The template can be up to 5 MB, and have up to 500 tasks. Each task list can have up to 100 task items.
5. Enter your information into the Task List Template.csv file and save it as a different name.
6. Import your CSV file when ready.
    - Follow the **Import Task List Template File** procedure below.

The table below contains a description of each field in the CSV file.

Column	Field name	Description
A	**Title**	Task List Title.

		• Required field • Maximum 800 characters.
B	**Description**	• Required field • Maximum 2,500 characters
C	**Owner Type**	This can be one of the following: • Individual • Group • Rule
D	**Owner ID**	This can be an External ID of an individual, a Group name, or a Rule name.
E	**Owner First Name**	Optional field.
F	**Oner Last Name**	Optional field.
G	**Task Name**	• Required field • Maximum 1,500 characters
H	**Assigned To Type**	This can be one of the following: • Individual • Group • Rule
I	Assigned To ID	This can be an External ID of an individual, a Group name, or a Rule name.
J	Assigned To First Name	Optional field.
K	Assigned To Last Name	Optional field.
L	Documentation	A document in the **Document Library**.

Import Task List Template File

To import a Task List Template CSV file:

1. From the **Critical Events** tab, select the **Task List Templates** subtab.
2. Click the **New Task List** menu.
3. Select **Import CSV file**. The **Upload Task List Templates** dialog appears. The imported file should be less than 5 MB, and can contain up to 100 tasks.
4. Click **Browse**.
5. From the **Open** dialog, browse to the desired **Task List Template** CSV file, and click **Open**.
6. Click **Upload**.
7. View the Upload status by clicking **Task List Imports**.
8. Review the file upload status of your previous action.

- This shows the file upload status such as how many rows have been received and how many have been loaded.

9. Click the View icon to see any import errors, organized by the Task List names.
    - Pick different task lists to view the details of what row of task items have been successfully uploaded or failed.
    - If an entry does not have a task list name, it is grouped into the **Unaffiliated Tasks.**

Your Task List Template is uploaded and ready to use.

> **NOTE:** Existing Task Lists will be overridden by lists uploaded here if they have the same name. It means that your existing task lists will be deleted. Make sure you are not replacing other people's task lists.

Error Handling Principles in the CSV Imports

Each row must have a Task List name. Otherwise, it will be skipped and put into the **Unaffiliated Task** bucket.

The **Description** field is required. The lack of a **Description** field content fails the entry.

- If a task list has more than one row, only one **Description** row is required.
- For example, if one task list has 20 task items, you only need to add a description for one of the rows.

If more than one kind of description exists for a single task list, the first one will be used.

Task List owners are not required information in the CSV file. However, if multiple different task owners are entered for the same task list, then the first one will be used.

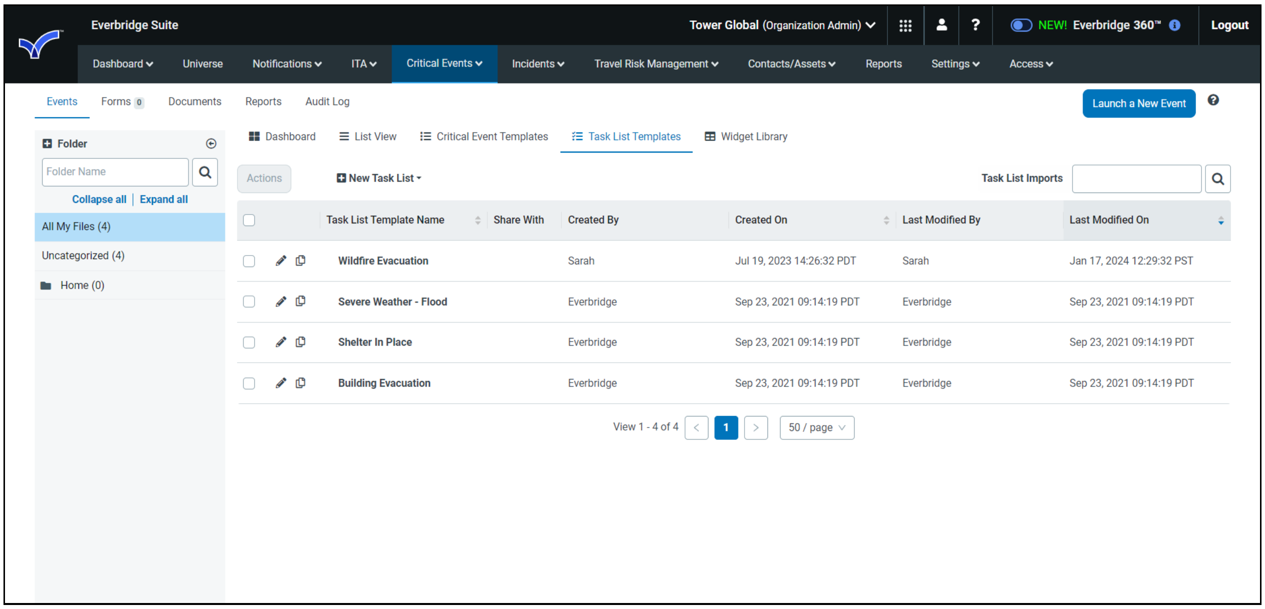
- The **Owner** Type is required so the system can recognize the event owners.
- For **Individual Owner Type**, both the **Task List Owner** and **Task Owners**, the **External ID** needs to be entered. **First Name** and **Last Name** will not work, as there might be multiple contacts with the same name.
- For the **Group Owner Type**, enter **Group** at **Owner Type**, and enter the **Group** name in the **Owner ID** column.
- For the **Rule Owner Type**, the CSV file needs the **Rule** name in the **Owner ID** column.
- **Assigned To Type** and **Assigned To** work the same way as **Owner Type** and **Owner ID**.

Owner First Name, **Owner Last Name**, **Task Assignee First,** and **Task Assigned Last** work the same way.

The **Document** section needs to have the **Document** name from the **Critical Event Document Library**.

Maintaining Task List Templates

Task List Templates can be viewed and maintained under the **Task List Templates** tab.



Copy Task List Template

To copy a Task List Template:

1. From the **Critical Events** tab, select the **Task List Templates** subtab.
2. Click the Copy icon next to the Task List Template you want to copy.
3. Click **Confirm**. Your Task List Template is copied.

Update Task List Template

To update an existing Task List Template:

1. From the **Critical Events** tab, select the **Task List Templates** subtab.
2. Click the Pencil icon next to the task list to be modified. The **Edit Task List Template** page appears.
3. Modify the Task List Template as needed.
    - See the procedure Create a Task List from a Task List Template for details about each field.
    - If needed, delete a task by clicking the **X** to the right of the task name.
4. Prioritize each task item by moving it up or down. The entire list also can be sorted by each column in the table.
5. Click **Save**.

Preview Task List Template

To preview the Task List Template Details:

1. From the **Critical Events** tab, select the **Task List Templates** subtab.
2. Click the Task List name. The **Task List Template Details** appear
3. View the details.
4. Click **Edit** template to modify the Task List Template details as needed.
5. See the previous procedure for details about each field.
6. Click **Save**.

Upload Task List Template

To upload a Task List Template:

1. From the **Critical Events** tab, select the **Task List Templates** subtab. The **Task List Templates** page appears.
2. Click the down arrow of the **New Task List** link.
3. Select **Import CSV File**. The **Upload Task List Templates** dialog appears.
4. Click **Browse** and navigate to your CSV file.
5. Select your Task List Template file and click **Open**.
6. Verify the name of the file. Existing task lists will be replaced by listed upload here if they have the same name.
7. Click **Upload**.

Delete a Task List

To delete an existing Task List:

1. From the **Critical Events** tab, select the Task List Templates subtab.
2. Select the task list to be deleted.
3. Click **Actions** and select **Delete**. The Delete Task List Templates dialog appears.
4. Click **Delete** again to continue.

NOTE: Task List Templates associated with an active event template cannot be deleted.

Download a Task List

To download an existing Task List:

1. From the **Critical Events** tab, select the **Task List Templates** subtab.
2. Select the task list to be downloaded.

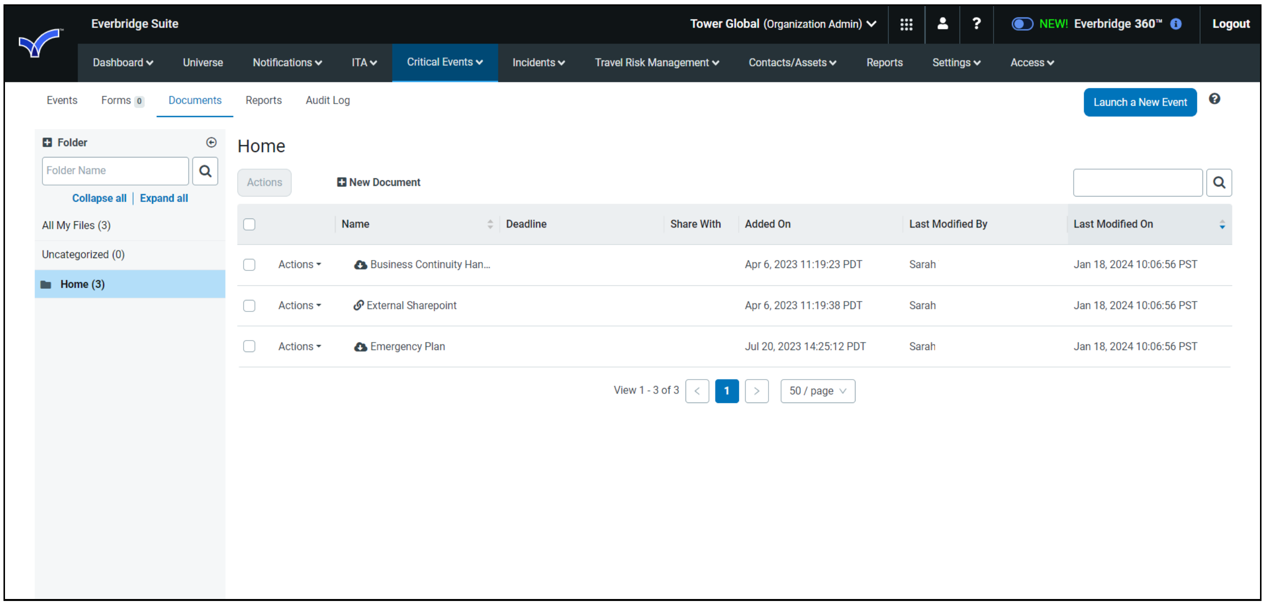
3. Click **Actions** and select **Download**. The **TaskListTemplate...** CSV file is downloaded to your computer.

NOTE: The downloaded task lists will be a CSV format. If you have documents, they will also appear in the CSV file.

Documents Library

Using the Home Folder and its Subfolders

A **Home** folder and its subfolders can be used across a Critical Event, Critical Event Template, Task List Template, and Document Library.



There is one **Home** folder, with up to 500 subfolders nested under it per Organization. The permissions of the parent folder are inherited by its child folders. Only Account Administrators, Organization Administrators, and Incident Administrators can move subfolders to other subfolders. Users can create and nest the subfolders up to four levels from the **Home** level. Each folder name can be up to 800 characters.

If a user launches an event template from Folder A, for example, then that event stays in Folder A. Users <u>cannot</u> delete folders that contain content.

- **All my files** — You can view all the resources to which you have access.
- **Uncategorized** — This refers to the files that are not in a folder.
- **Home folder** — There is only one **Home** folder per Organization. Any other folders created are subfolders. Users can rename the **Home** folder and any subfolders.

Mixed Object Permissions in Folders

Critical Event Templates and Task List Templates can have mixed permissions. This means if a Critical Event Template contains components from different folders, the user can view the event template, edit the event template components, and remove the components to which he or she does not have access.

Example 1

The Organization Administrator mixes the following permissions:

- The Incident Administrator **Boston** has access only to Folder A, which includes a Critical Event Template called **Earthquake**, a Task List called **Earthquake** from Folder C, and a Document called **B** from Folder B.
- The Incident Administrator can view the Critical Event Template and can view and edit the Task List and Document. However, if the Task List or Document are removed, then the Incident Administrator cannot add them back in once removed.
- If a Task List Template contains a document from a non-permitted folder, the user can view the task list template, and edit, remove, and delete the task list template.

Example 2:

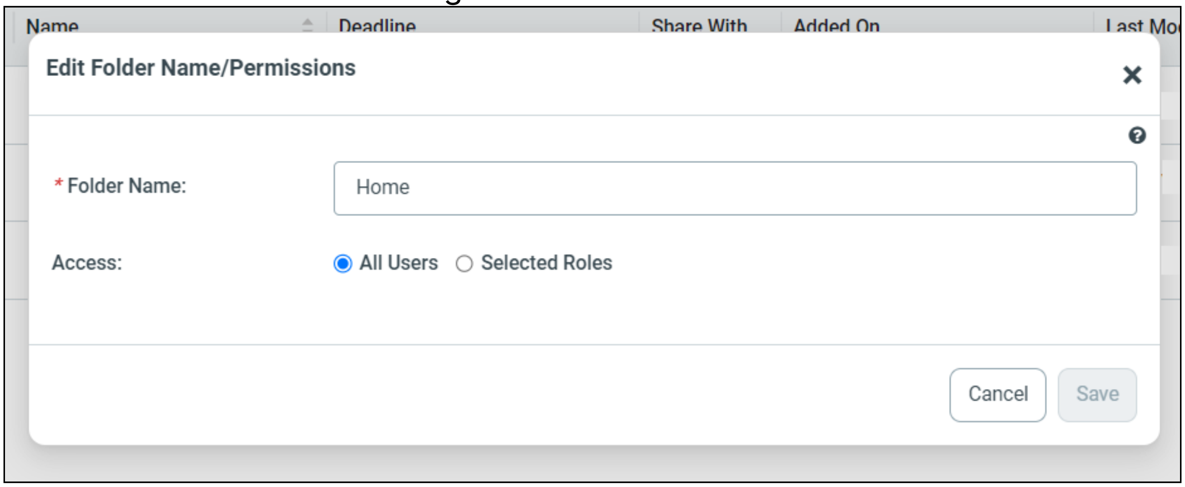
The Organization Administrator mixes the following permissions.

- The Incident Administrator **Boston** has access only to Folder A, which includes a Task List called **Flood** and a Document called **B** from Folder B.
- The Incident Administrator can view, remove, and delete the Task List Template and Document B. However, the Incident Administrator cannot add them back in once removed/deleted.
- If the Organization Administrator moves Folder C from **Public** to **Private**, some users will have no access to Folder C and therefore cannot view it. For launched active events, the Organization Administrator must manually move the active events into Folder C.

Rename Home Folder

To rename the Home folder and give it permissions:

1. From the **Critical Event Templates**, **Task List Templates**, or **Document Library**, hover the mouse over the Cogwheel icon next to the **Home** folder name.



2. Click **Edit Name/Permissions**. The **Edit Folder Name/Permissions** dialog appears.
3. In the **Folder Name** field, rename the folder.
4. In the **Access** field, select one of the radio buttons:
   - **All Users** — All users can access the selected folder.
     - Click the **All Users** radio button.
     - Click **Continue** to apply All Users permission to all subfolders.
     - Click **Save**.
   - **Selected Roles** — Only specific roles can access the selected folder.
     - Click **Select Roles**. The **Select Roles** dialog is displayed.
     - In the **Role Type** field, select **Incident Administrator** or **Incident Operator** from the menu.
     - Search to or select the checkbox of the role you want to specify.
       - Select all roles by selecting the checkbox next to the **Role** column heading.
     - Optionally, delete unneeded roles by selecting the checkboxes from the **Selected Roles** pane, then click **Remove**.
     - Click **Save**.
5. Click **Save** to save the folder name and its permissions.

Add a Subfolder

To add a subfolder to the Home folder or a subfolder:

1. From the **Critical Event Templates**, **Task List Templates**, or **Document Library**, hover the mouse over the Cogwheel icon next to the **Home** folder name.
2. Click **Add subfolder**. The **New Folder** dialog appears.
3. In the **Folder Name** field, enter the subfolder name.
4. In the **Access** field, select one of the radio buttons:
   - **All Users** — All users can access the selected folder.

        - Click the **All Users** radio button.
        - Click **Continue** to apply All Users permission to all subfolders.
        - Click **Save**.
    - **Selected Roles** — Only specific roles can access the selected folder.
        - Click **Select Roles**. The **Select Roles** dialog is displayed.
        - In the **Role Type** field, select **Incident Administrator** or **Incident Operator** from the menu.
        - Search to or select the checkbox of the role you want to specify.
            - Select all roles by selecting the checkbox next to the **Role** column heading.
        - Optionally, delete unneeded roles by selecting the checkboxes from the **Selected Roles** pane, then click **Remove**.
        - Click **Save**.
5. Click **Save** to save the folder name and its permissions.

Actions You Can Perform

You can perform the following actions with Critical Event Templates, Task List Templates, and Documents:

- **Download** — Generate a CSV file of a task list.
- **Share With Mobile Members** — Share your task lists and documents with mobile members.
- **Remove Sharing** — Halt the sharing of task lists and documents with mobile members.
- **Delete** — Delete a subfolder from the following subtabs:
    - **Critical Event Home (Active events)**
    - **Critical Event Templates**
    - **Task List Templates**
    - **Document Library**
- **Move To Folder** — Move a Critical Event Template, Task List Template, Active Events, or Document to a folder.

Follow the procedures below to perform the desired action.

Download a Task List

To download a Task List:

1. From the **Critical Event Templates** page, select the **Task List Templates** page.
2. Select the checkbox of the task list to download. The **Actions** menu is enabled.
3. Select **Download** from the **Actions** menu.
4. Open the CSV file.
    - Resize the columns, as needed.
5. Save the CSV file.

Share a Task List or Document with Mobile Contacts

To share a task list or document with mobile contacts:

1. From the **Task List** plan, select the **Task List Templates** page or **Document Library**.
2. Select the task list or document to share with mobile members. The **Actions** menu is enabled.
    - You can also search for the task list name.
3. Select **Share With Mobile Contacts** from the **Actions** menu.
4. From the **Share With Mobile Contacts** dialog, select the Individuals, Groups, and Rules with whom you want to share, and click **Select**.
5. Click **Share**. The **Share With** icon appears.
6. Email and mobile push Notifications are delivered to your selected mobile members. The push Notification will display either:
    - **Task List** — New task list plans have been shared with you.
    - **Document** — New documents have been shared with you.
7. Optionally, click the **Share With** icon to see the contacts with whom you are sharing. The Preview Contacts dialog appears.
8. Select the different tabs to see Individuals, Groups, or Rules, then click **OK**.
    - In turn, mobile members tap the link and the task list or document appears.

Remove Sharing

To remove sharing of a Task List plan or Document:

1. From the **Task List Templates** page or **Document Library**, select the item from which to remove sharing. The **Actions** menu is enabled.
2. Select **Remove Sharing** from the Actions menu.
3. Click **Remove** to remove sharing. Contacts can no longer access the selected documents on their mobile device and downloaded documents will be removed.
4. See the page from which you removed sharing. The Share With icon no longer appears.

> **NOTE:** Removing the sharing on the Manager Portal triggers the Everbridge Mobile App to remove the downloaded documents.

Delete a Subfolder

To delete a subfolder:

1. Make sure to remove all contents from the folder. The folder must be empty in order for it to be deleted.
2. From the Critical Event Templates, Task List Templates, or Document Library, hover the mouse over the **Cogwheel** icon next to the subfolder to delete.
3. Click **Delete**. The **Delete Folder** dialog appears.
4. Click **Delete** to confirm you want to delete this folder and all its content, including any subfolders.

Move a Critical Event

To move a Critical Event, Critical Event template, a Task List template, or a document to a folder:

1. From the **Critical Event** list, **Critical Event Templates** page, **Task List Templates** page, or **Document Library**, select the checkbox of the item you want to move. The **Actions** menu is enabled.
2. Click **Actions** and select **Move to Folder**. The **Move to Selected Folder** dialog appears.
3. As needed, search for the folder name or click either **Collapse all** or **Expand all** to see the nested folders.
    - Subfolders can be nested four levels under the **Home** folder.
4. Select the folder to which you want to move the item, and click **Select**. The item is moved to the selected folder.

NOTE: The item number is added to the current folder (the folder to which you moved the item), not any folder levels above it.

Maintaining Documents

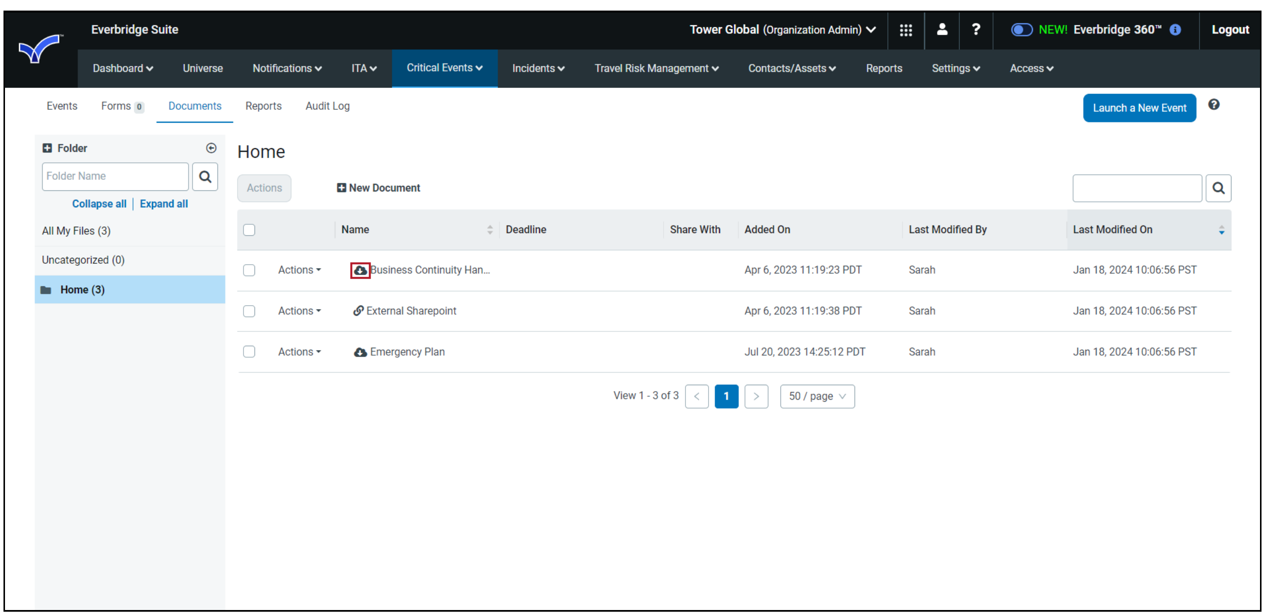
A document file helps the owner of a Task to do their job. You can upload different types of documents, with the exception of executable files (files with the **.exe** file extension).

Common file formats include the following, and the maximum file size is 50 MB:

- **Document file formats**—csv, doc, docx, docm, dotx, dotm, eml, gdoc, gsheet, log, md, msg, numbers, ods, odt, pages, pdf, rtf, txt, vi, webdoc, wpd, xls, xlsm, xltx, xltm, xlsx, xsl
- **Presentation file formats**—gslide, gslides, key, odp, ppt, pptx, pps, ppsx, pptm, potx, potm
- **Image file formats**—ai, bmp, dcm, gif, eps, heic, ico, jpeg, jpg, png, ps, psd, svg, tif, tiff, dcm, dicm, dicom, svs, tga, pjpeg, webp
- **Video file formats**—mpg, mpeg, avi, qt, mov, mp4, m4v, wmv
- **Audio file formats**—wav, mp3, wma, amr
- **Other file formats**—ics, ical (calendar)

NOTE: These file formats may be updated based on customer feedback.

After uploading, the document can be added to your Critical Events. You can download the document by clicking the **Download** icon.



Add a Document

To add a new document to the Document Library:

1. From the **Critical Events** tab, select the **Document Library** subtab.
2. If known, select the folder name from the left-hand pane.
3. Click **New Document.** The **New Document** dialog is displayed.
4. Do one of the following:
    - Click **Upload**, enter a Document Name (up to 800 characters), and Browse to the file. You can upload up to 15 files at once, with a maximum single file size of 50 MB. Each document must have a unique filename.
    - Click **Link**, enter a Document Name (up to 800 characters), and enter the URL. Make sure to precede your website address with the **https://** protocol.
5. Click the Information icon next to the File label to see the currently-supported file formats.
6. Click **Add to Document** Library. Your document is added to the selected folder. If you did not select a folder, your document is added to the **Uncategorized** folder.

Update Existing Document

To update an existing Document:

1. From the **Critical Events** tab, select the **Document Library** subtab.
2. Select the check box next to the document to be modified.
3. From the **Actions** menu, select **Update**.
4. Enter your updated information.
5. Click **Update Document**.

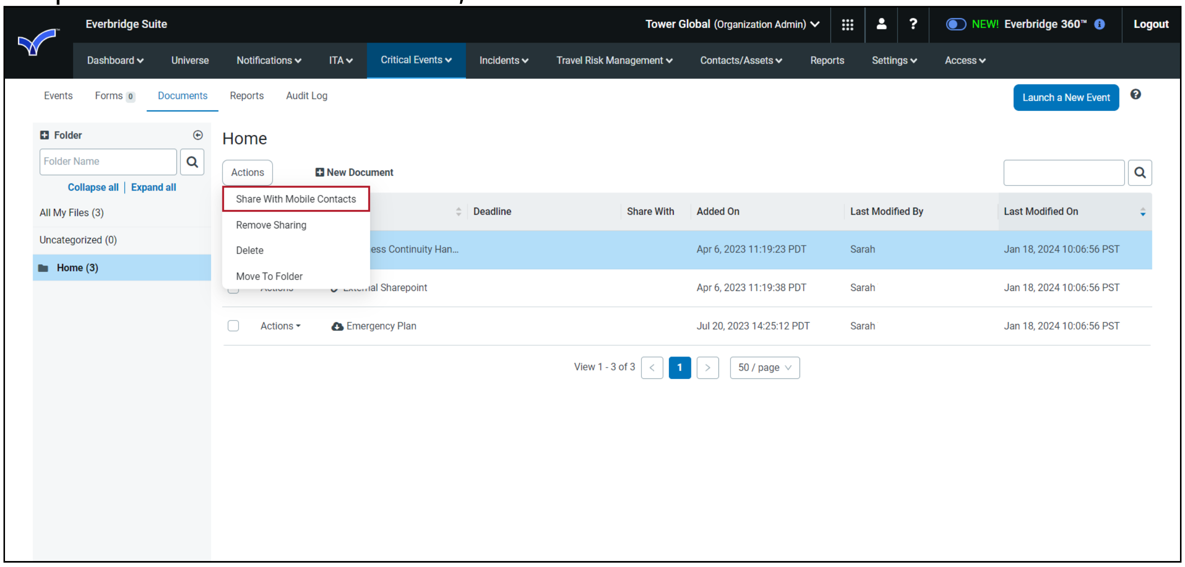
> **NOTE:** The document type is controlled by the file extension.

Share Documents with Mobile Contacts

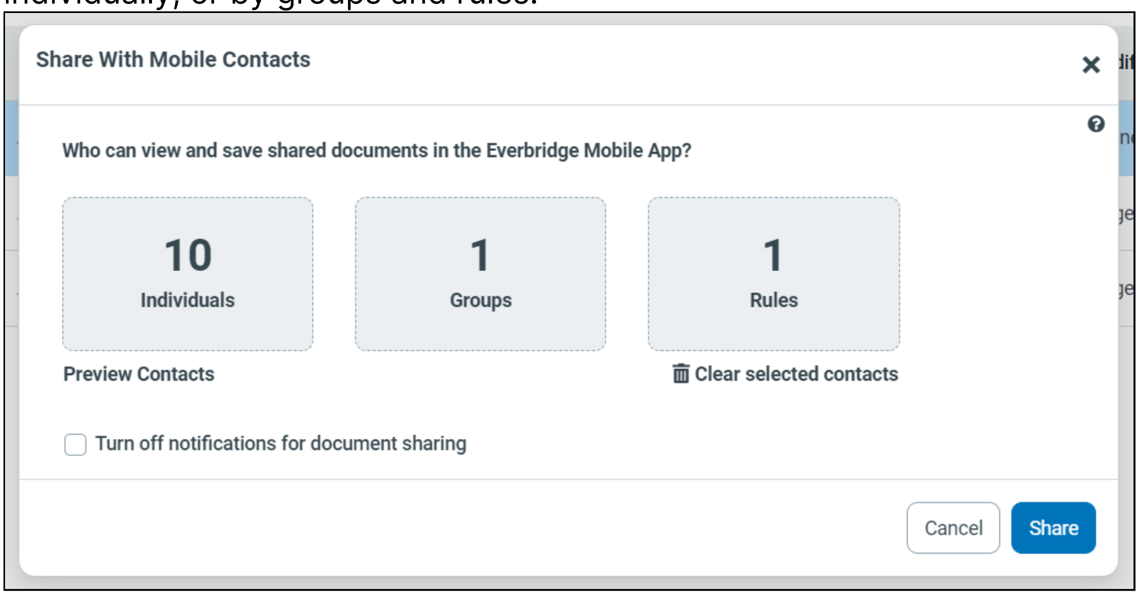
To share a Document with mobile contacts:

1. Select the checkmark next to the desired Document in the **Document Library**.

2. The **Actions** menu button will become available. Click on it to open the dropdown of available actions, then select **Share with Mobile Contacts**.



3. The following modal will appear, where recipients can be specified individually, or by groups and rules.



4. If desired, review the selected recipients by clicking **Preview Contacts**.
5. Click **Share**.

Set a Reminder

To set a reminder:

1. From the **Critical Events** tab, select the **Document Library** subtab.
2. Select the check box next to the document to set a reminder.
3. From the **Actions** menu list, select **Set Reminder**. The **Set Reminder** dialog appears.

4. Fill in the fields, as needed.
    - **Update Deadline**—From the drop-down list, select Recurring or One Time.
    - **Recurring**—Select how often from a specific date.
    - **One Time**—Select a date.
    - **Alert Settings**:
        - **Start**—Enter the number of minutes, hours, or days before the deadline to be alerted.
        - **Frequency**—Enter the number of minutes, hours, or days to be reminded.
        - **Recipients**—Select the users to be reminded.
        - **Escalation**—If the document is past due, users on this escalation list are added to the Notification recipients.
5. Click **Save**. Reminders that have deadlines approaching will also have **Delete Reminder** in the Actions menu. Once you have updated the document based on the reminder, open the **Set Reminder** dialog and click **Document Updated**.

Delete Document

To delete an existing Document:

1. From the **Critical Events** tab, select the Document Library subtab.
2. Select one or more check boxes next to the names of the desired Documents.
3. From the **Actions** menu, click **Delete**. The **Delete Document** dialog is displayed.
4. Click **Delete** when you are sure you want to continue.

NOTE: Documents associated with an active event cannot be deleted.

Forms Module

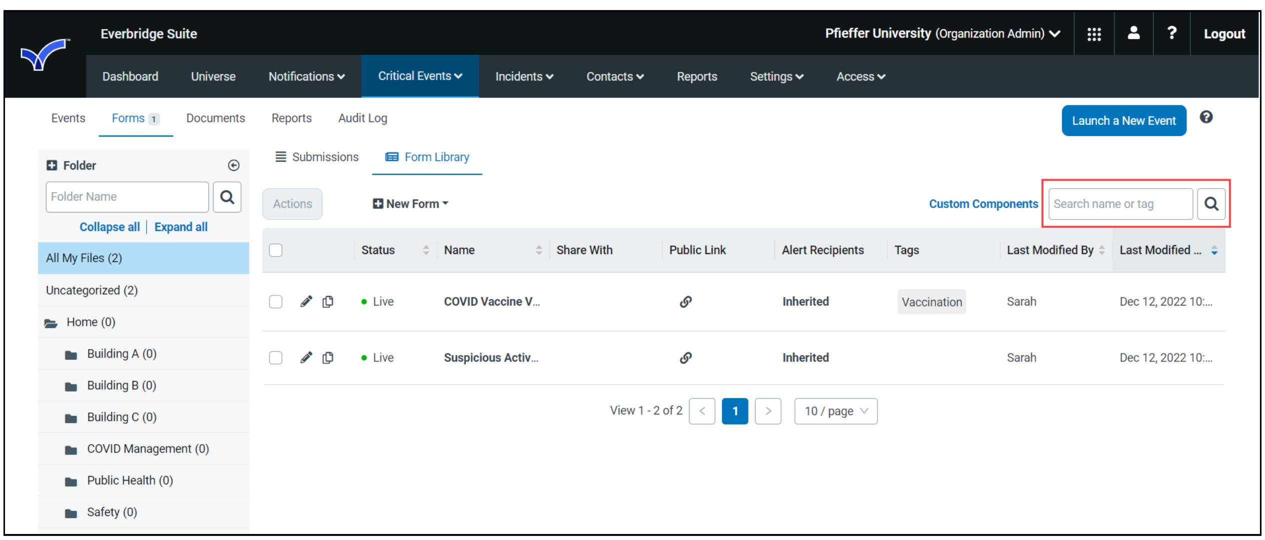
After you have set up your Form Settings, you can add folders to your Forms. Click **Forms** in the menu. The number in the red box indicates the number of Forms.

> **NOTE:** To learn about Folders and Subfolders, see Using the Home Folder and its Subfolders.

Next to **New**, you can select a specific form from the Form drop-down list or a specific status from the **Status** menu. The forms are in the Form Library. The statuses are configured in **Settings > Organization > Critical Event > Form Settings**.

To search for a Form:

1. In the **Search** field, enter one of the following:
    - A word that is part of the Form name.
    - The Form ID.
    - A word that is included in the content of the Form.
2. Click the Search icon and, depending on what you entered in Step 1, select either:
    - By name & ID.
    - By content.
3. From the search results, select the Form.



Create a Search Filter

To create a search filter:

1. From the **Form Library**, click **Forms** in the top menu bar.
2. Your Forms are displayed.
3. Select from the following lists:
    - **Form** — Select either **All Forms** or any individual recent form.
    - **Status** — All statuses except **Closed** are selected by default. Select or clear the items as desired.
    - **Show** — If you selected an individual form, then select **List (default)** or **Raw Data**.
    - **More** — If you selected **Raw Data**, add more filters:
        - **Created By**
        - **Last Updated By**
        - **Date Range** - You can search up to a six-month date range.
4. Select the Gear icon to Manage Filters.
5. Select **Save Current Filter**. The **Save Filter** dialog is displayed.
6. Type a name and click **Save**.

To use this filter, select the Gear icon to Manage Filters, and select its name from the list.

Add a Form

To add a Form:

1. From the **Status** drop-down list, select the desired status.
2. The status is determined by your organization and set up in Form Settings.
3. Click **New**. The **Select a Form** dialog is displayed.
4. Select the form (you can search for its name or its form tag), then click **Next**. The selected form is displayed.
5. Enter the information and click **Submit**. The **Add Title** dialog is displayed with a suggested title.
6. Determine whether to keep the suggested title or rename the title, then click **Save**.
7. From the **Record Information** pane, you can:
    - **View History** — Click the View History icon to see the history of a Form. The most recent updates are listed at the top. Select the desired date and time to view its history.
    - **Status** — Change the status by selecting a different status from the list.
    - **Linked** — Click the number and the **Linked Critical Events** dialog is displayed. Click **OK** after viewing the critical events.
8. Your Form is now listed at the top of the table.

Edit a Form

By default, you can edit the form while its status is still **Open**. If your Administrator enables the toggle in the **Settings > Organization > Criticial Event > Forms Settings** page, then you can edit the form even if the status is **In Progress**.

> **NOTE:** Everbridge does not support multiple users editing a Form at the same time. If two users (for example, one using Manager Portal and the other using Member Portal) are simultaneously editing the same Form, a warning message appears to the second user that the first user is editing the page. The message explains the latest submission will override earlier submissions. To continue with the second user's edits, click **Continue**. Otherwise, click **Cancel** and wait, then refresh the page and make your changes.

To edit a Form from the Manager Portal:

1. From the Critical Events tab, click **Critical Event Home**.
2. Click **Forms**. The list of form forms is displayed.
3. Click the Pencil icon of the form to edit.
4. Read the NOTE above, if applicable.
5. Make the desired changes.
6. Click **Submit Resource Form**.

To edit a Form from the Member Portal:

1. Log in to the Member Portal, and click **Critical Events**. The Events page is displayed.
2. Select the down arrow (v) next to the Events header, then click **Forms**.
3. Click the desired Form name, and click **Edit**.
4. Read the NOTE above, if applicable.
5. Make the desired changes.
6. Click **Submit Resource Form**.

Manage Columns

To manage the columns on the **Forms** page:

1. To change the order of the last three columns on the **Forms** page, click the **Manage Columns** icon (to the left of the Search field). The **Manage Columns** dialog is displayed.

2. Perform one or more of the following:
    - Change the order of a column by selecting its Hamburger menu, holding down the mouse key, moving the column up or down, then releasing the mouse key.
    - Delete the column from the page by clicking the X to the right of the column name.
3. Click **Save**.

Maintain a Form

To maintain a Form on the Forms page:

1. Click the checkbox next to the Form on which to perform actions. The **Actions** menu becomes enabled.
2. Click the desired action from the **Actions** drop-down:
    - **Link to** Critical Event — Perform Steps 3 and 4.
    - **Delete** — Perform Steps 5 and 6.
    - **Move to a Folder** — Perform Steps 7 and 8.
3. Click **Link to Critical Events**. The **Link to Critical Events** dialog is displayed.
4. From the menu, select the Critical Event to link and click **Save**.
5. Click **Delete**. The **Delete Forms** dialog is displayed.
6. Click **Delete Forms** to confirm the deletion.
7. Click **Move to Folder**. The **Move to Selected Folder** dialog is displayed.
8. Select the folder name and click **Select**.

Add a Comment

To add a comment or Notification to a Form:

1. From the Form Library, click **Forms** along the top menu bar. Your Forms are displayed.
2. Select the name of the Form to add a comment or Incident Notification.
3. Add one or both of the following:
    - To add a comment about this Form, go to Step 4.
    - To add an Incident Notification that can be sent to alert your contacts about this form, go to Step 5.
4. To add a comment, click **Comment**.
5. Optionally, select the checkbox if the comment is only for the Manager Portal.
6. Enter your comment text, using a maximum of 5,000 characters and a maximum of four files.
7. Click **Add Comment**.
8. To add a Notification, click the **Notification tab**.
9. Click **Create New Incident Notification**.

10. Select the desired template from the list of Incident Scenarios or Other Incident Templates.
11. Click **Add Selected Templates**.
12. Update the Incident details as needed, then click **Send**.

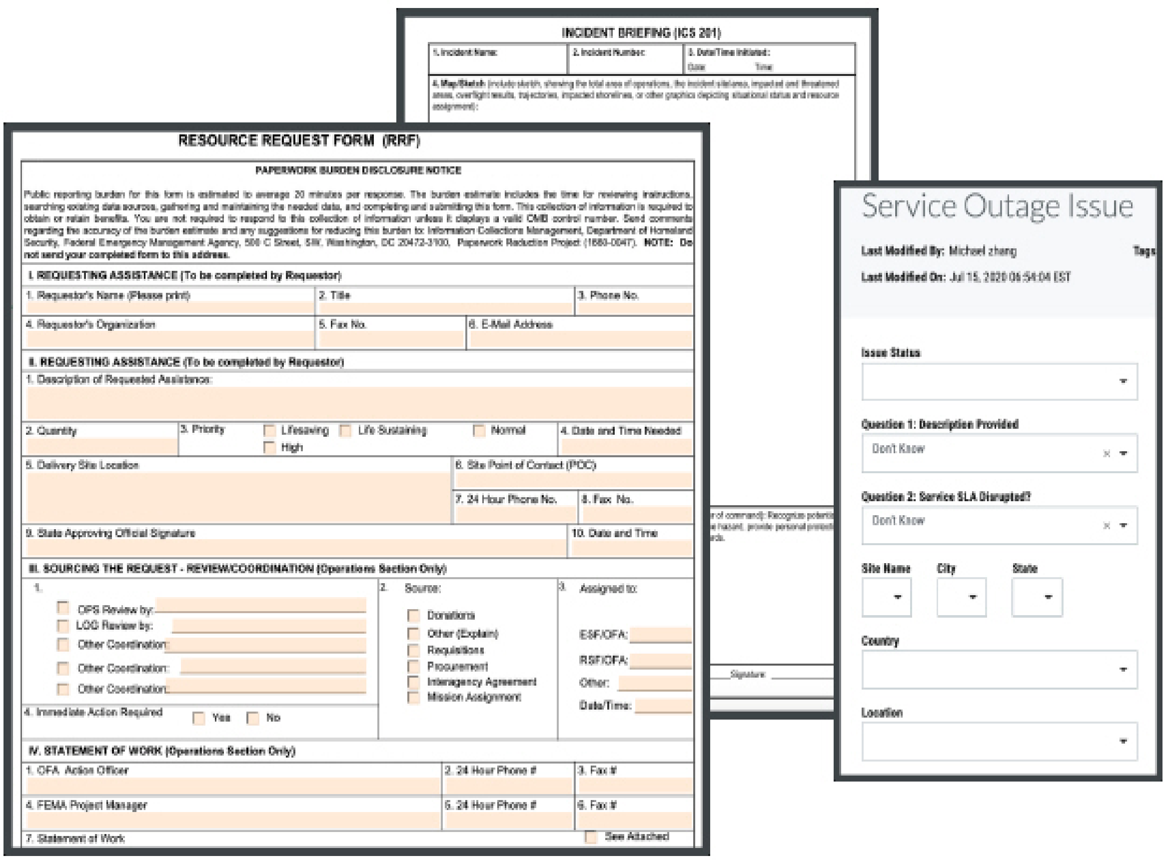
NOTE: Standard users can edit and delete their own comments and notes, while Administrators can also edit or delete those left by others.

Form Library Overview

You can create Custom Forms using the **Form Library**. The Form builder supports simple and complex Forms. Collect data all at once, then repurpose the data across many Forms. It utilizes a similar folder hierarchy to other areas of the Manager Portal, allowing for easy organization and navigation.

The following are a few examples of Custom Forms:

- Situation Reports
- Resource Requests
- Impact Assessment Surveys



The types of Forms you can create are:

- **Form**—Create a single Form
- **Wizard**—Create multiple-page Forms
- **PDF**—Upload a PDF, then enter components into it

In general, there are different Form components from which to use. In each component, there are options to define the fields and validations, allowing you to Format the information as desired.

NOTE: The **Form Library** includes a **Developer Mode** toggle, which provides additional subtabs in each component, such as API, Logic, and Layout. Experienced developers can use the toggle to add advanced features as they create Form components. Only the non-Developer model is documented here. If you use the Developer mode, feel free to explore the advanced features.

General Settings

The following lists some of the general settings that are offered for the majority of the Form components.

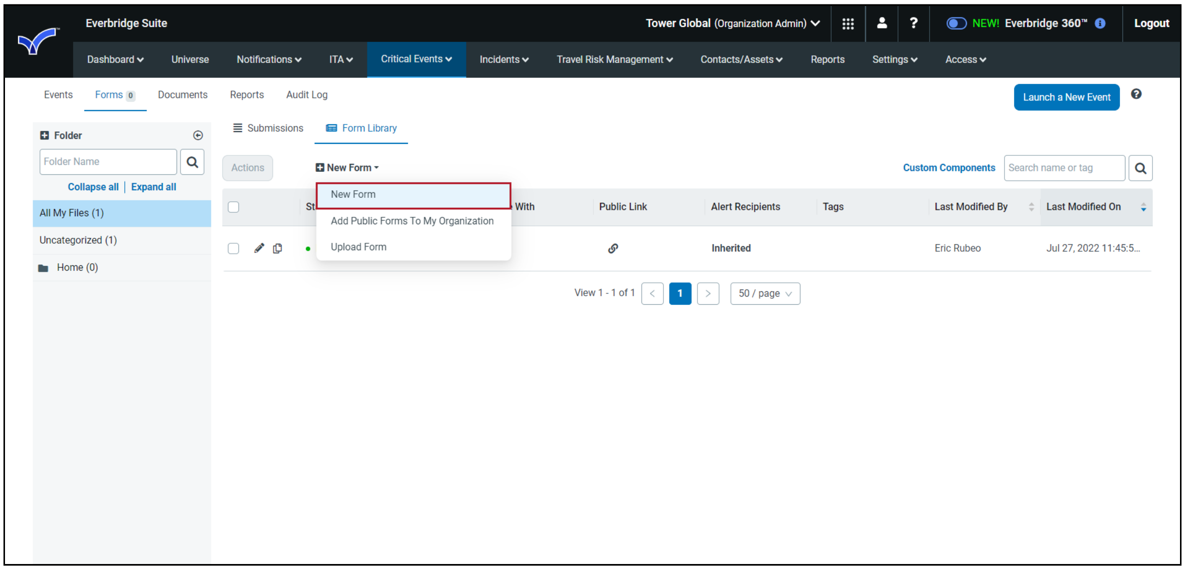
- **Label**—Enter the name or title of this component.
- **Label Position**—The position for the label for this field.
- **Placeholder**—The placeholder text that will appear when this field is empty.
- **Description**—The text that appears below the input field.
- **Tooltip**—Adds a Tooltip icon to the side of this field.
- **Prefix**—The text to show before a field. An example is “$” for USD.
- **Suffix**—The text to show after a field. An example would be ”lbs” for weight.
- **Widget**—A component of the interface that enables the user to perform a function or access a service.
- **Hidden**—A hidden field is still a part of the Form JSON, but is hidden when viewing the rendered Form.
- **Hide Label**—Select this check box to hide the label of this component. This setting displays the label in the Form builder, but hides the label when the Form is rendered.
- **Hide Input**—Hide the input when viewing the Form from the front-end browser. This does not encrypt on the service. Do not use for passwords.
- **Disabled**—A disabled field cannot be edited by the user or contact.

Creating a New Form

To create a new Form:

1. Navigate to **Critical Events > Form Library**.

2. Click **New Form > New Form**.



3. The **New Form** page appears, where you use the **Form Builder** on the left-hand pane to create your Form. The **Form Builder** sections are as follows:
   1. **Basic**
   2. **Advanced**
   3. **Layout**
   4. **Data**
   5. **Custom**
4. Type a unique name for the component.
5. Select the **Type** from the menu:
   - **Form**—Create a one-page Form.
   - **Wizard**—Create multiiple pages of a Form.
   - **PDF**—Upload a PDF file.
6. Optionally, add any Tags.
7. Drag and drop the desired component onto the Form where you want it to be located.
8. Enter the component information, as applicable. As you enter the information, you can see how the component appears by looking at the Preview.
9. For Text Fields or Text Areas, insert an Incident Communications custom variable or Crisis Management system variable so that Form content will automatically be pulled from an event.
10. From the Data subtab, type **{{** in the Default Value field.
11. Select the default value from the drop-down list. This will be the value for this field, before user interaction. Having a default value overrides the placeholder text.
12. Click **Save**. You can use this Form to create a Form Report or Tracker. When you preview the Form Report or submit the Tracker Form, the value of the variable is displayed.
13. To add a similar component on the Form, click the respective Action icon located to the right of the component:

   - Edit
   - Move
   - Copy
   - Save
   - Remove
14. If you duplicated a component, click the **Edit** icon to rename the component and modify any component information.
15. Make sure to go through each Form Builder section in the left-hand pane and fill in the fields as needed. You can always return to the Form and edit it.
16. Repeat steps 5-9 above for each component you want to add to the Form.
17. Click **Save**.

NOTE: Forms have either a **Live** or **Draft** designation in the Create Form and Edit Form flows near the top of the page. If a Form is in a Draft state, then it can't be shared or used to create submissions, trackers, form reports, and custom widgets.

Search for a Form

You can search for a Form by name or by tag. To do this:

1. Navigate to **Critical Events > Form Library.**
2. Enter the Form name or Form tag you want to find. The search results list the Form name or Form tags that match the search.
3. Perform any actions on the Form.

Search for a Form Report

To search for a Form report:

1. Navigate to **Critical Events > Critical Event Home.**
2. Select an event. The **Event Details** page appears.
3. Select the **Form Report icon**. The **Form Report** page appears.
4. Select **New Form Report**. The **Select a Form** dialog appears.
5. Search for the Form by name or by tag.
6. Click **Save**.

Add Public Forms to My Organization

You can add Incident Command System (ICS) industry-standard Forms to your Organization's Form Library. To do this:

1. Navigate to **Critical Events > Form Library**.

2. Click **New Form > Add Public Forms to My Organization**. The **Add Public Forms to My Organization** dialog appears.
3. Search for the system Form, if needed.
4. Click **OK**.

Upload a Form

You can upload up to 15 JSON files, with a maximum json single-file size of 50 MB, to your Organization's Form Library. To do this:

1. Navigate to **Critical Events > Form Library.**
2. Click **New Form > Upload Form**. The **Upload Form** dialog appears.
3. Click **Browse**.
4. Select your JSON Form (up to 15), then click **Upload**.

Make changes to a System Form

To make changes to a system Form:

1. Select the system Form you want to change.
2. Proceed to the step below to perForm the following:
   - Step 3 to edit the system Form.
   - Step 4 to copy a system Form.
   - Step 5 to download a Form.
   - Step 6 to share a system Form with members of your Member Portal.
   - Step 7 to remove the sharing from your Member Portal.
   - Step 8 to delete a system Form from your Organization.
3. To edit the system Form:
   - Click the Pencil icon next to the Form.
   - Make your changes using the **Form Builder**.
   - Click **Save**.
4. To copy a system Form:
   - Click the Copy icon. The **Copy Form** dialog appears.
   - Rename the copied Form.
   - Click **OK**.
5. To download a Form to your desktop:
   - Click the check box of the Form you want to download.
   - From the **Actions** menu, select **Download**.
6. To share a system Form with members of your Member Portal:
   - Select the check box next to the Form name.
   - Click **Actions**.
   - Click **Share with Contacts**. The **Share with Contacts** dialog appears.
   - Choose either **All members** or **Selected Members**.
     - If Selected Members, select the contacts by clicking **Individuals**, **Groups**, or **Rules**.
   - Click **Share**.

7. To set a **Request Alert**, which allows specified recipients to receive alerts when a request is created:
   - Select the check box next to the Form name.
   - Click **Actions**.
   - Click **Set Request Alert Recipients.**
   - Click **Edit** and navigate the search menu to add users
   - Type in emails manually and press Enter if they are not a part of your Member Portal.
   - Click **Save.**
8. To remove the sharing from your Member Portal:
   - Select the check box next to the Form name.
   - Click **Actions**.
   - Click **Remove Sharing**. The **Remove Sharing** dialog appears.
   - Click **Remove.**
9. To delete a system Form from your Organization:
   - Select the check box next to the Form name.
   - Click **Actions**.
   - Click **Delete**. The Delete Form dialog appears.
   - Click **Delete Form** to confirm you want to permanently remove the Form from your Organization.

Edit a Form

To edit a Form:

1. From **Critical Events > Form Library**, click the Pencil icon of the existing Form that you want to modify.
2. Select a component to be modified.
3. Click the respective **Action** icon located to the right of the field:
   - **Edit**
   - **Move**
   - **Copy**
   - **Save**
   - **Remove**
4. Repeat Steps 2-3 above for each component.
5. Click **Save** to return to the Form.

To configure PDF settings for a printer-friendly version of your Form:

1. Enter **Critical Events > Form Library**, and click on the **Pencil** icon of the existing Form that you want to modify.
2. At the top left corner, left of the blue Save, click **PDF Settings**.

Move Forms to Folders

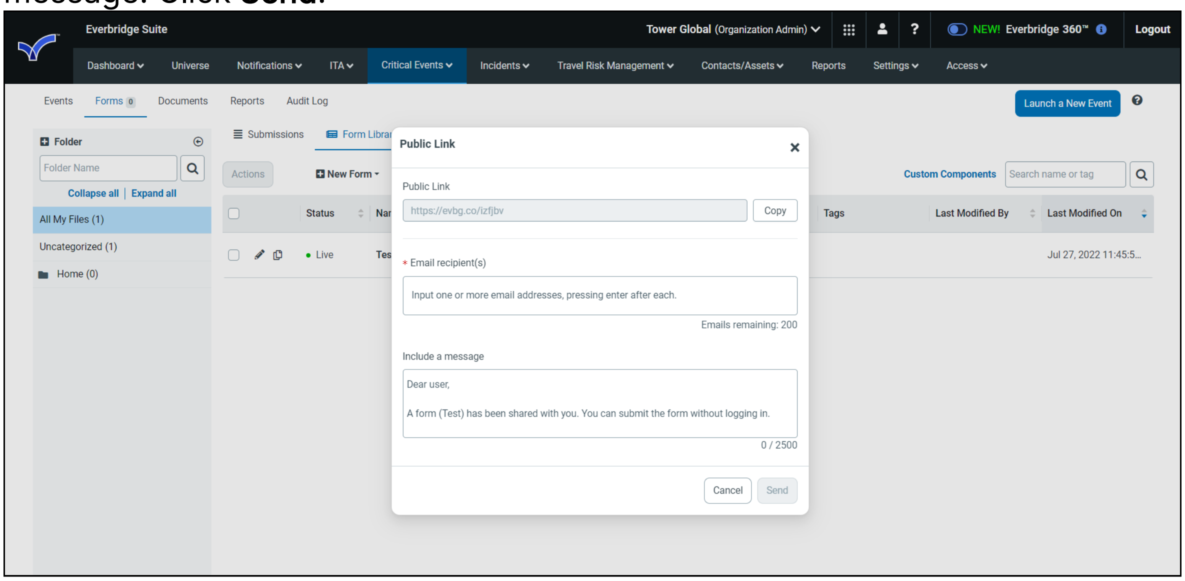
To move a Form to a folder:

1. From **Critical Events** > **Form Library**, select the checkbox for the Form you need to move.
2. Click the **Actions** button.
3. Select **Move to Folder**.
4. A popup menu will appear. Select the destination folder.
5. Click **Save**.

Create a Public Link

Forms can be shared externally by utilizing Public Links. To create one:

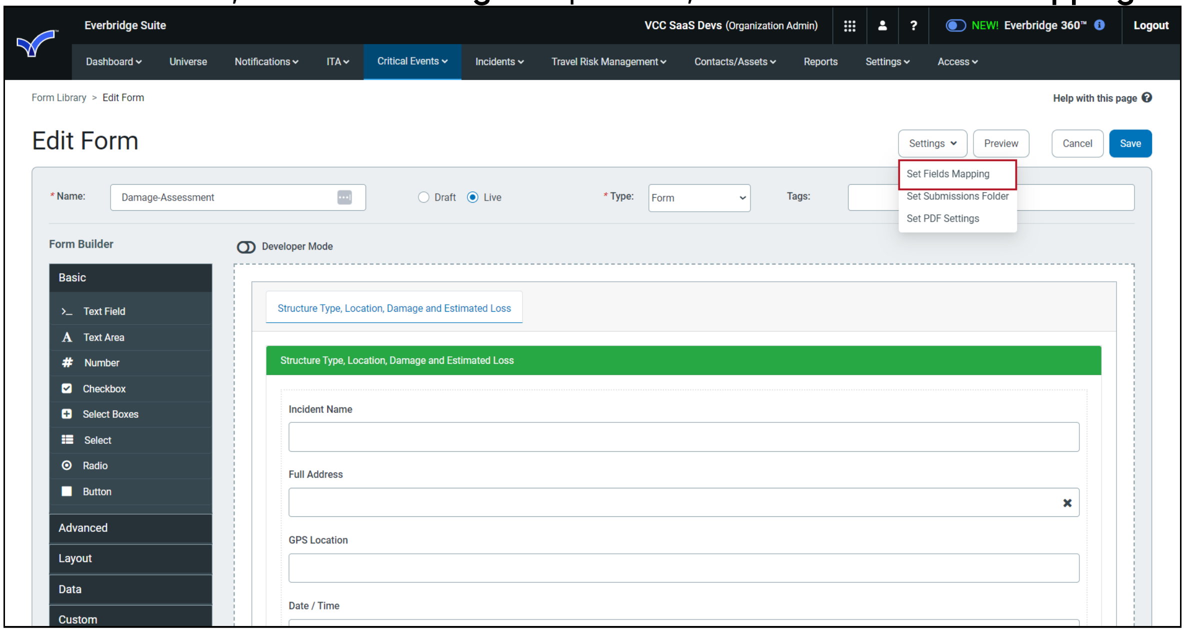
1. Click the **Public Link** icon for the desired Form in the **Form Library**.
2. Copy the generated Public Link.
3. Alternatively, input the emails of the intended recipients and an optional message. Click **Send**.



Applying Field Mappings

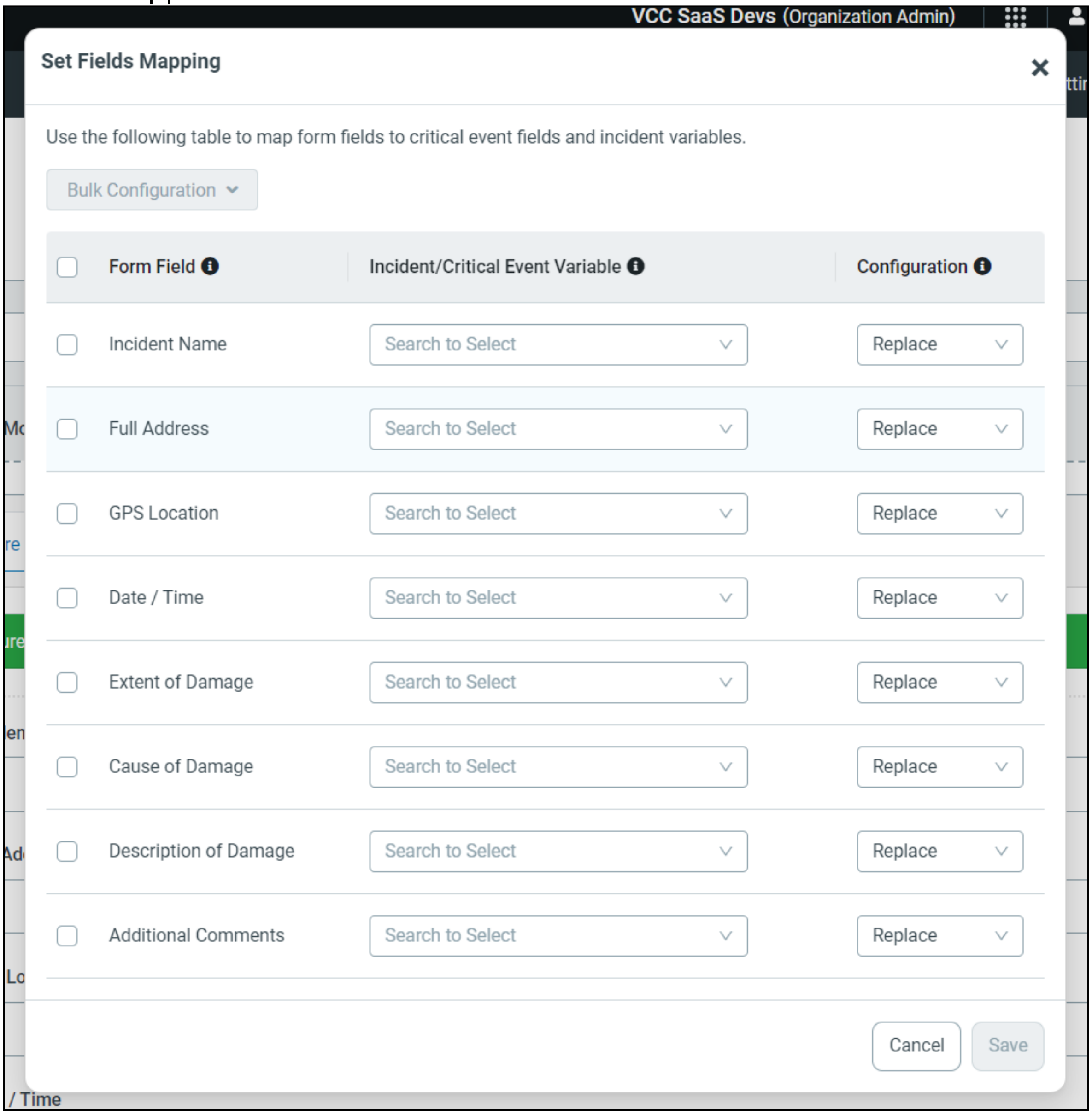
Field Mappings can be applied on the **Edit Form** page to avoid filling the same fields twice when launching an **Incident Communication Form** or **Critical Event Form.**

1. Click **Edit Form**, then the **Settings** drop-down, and then **Set Fields Mapping**.



2. A popup menu will appear. Choose the desired **Form Fields** by checking the box to their left. Note that only persistent fields (those stored on the server)

can be mapped to variables.



3. Click on the **IC/CE variables** to map to the selected Form Fields.
4. Under **Configuration**, specify whether you'd like to Match or Replace. **Match** populates the field so long as the values on the Form and the incident variable match. **Replace** swaps the value from the Form with the value from the incident variable. Note that Replace is only valid when the Form field and the incident variable are of the same type.
5. Click **Save** when finished.

Managing Custom Components

From the **Form Library** page, you can manage custom components by clicking **Custom Components** near the top right-hand side of the page. The **Manage**

Custom Components dialog appears, where you can edit a component or rename it.

To manage custom components:

1. From the **Form Library** page, click **Custom Components**. The **Manage Custom Components** dialog appears.
2. Select the checkbox of the custom component.
3. To edit the custom component:
    - Edit the component fields as needed.
    - Remember to review all the sub-tabs within the component.
4. Click **Save.**

To rename the custom component:

1. Click the **A**. The **Rename** dialog is displayed.
2. Rename the component.
3. Click **OK**.

Creating Automatic Folder Routing

Admin users can create settings to automatically route new contact requests into designated folders from the **Form Library**.

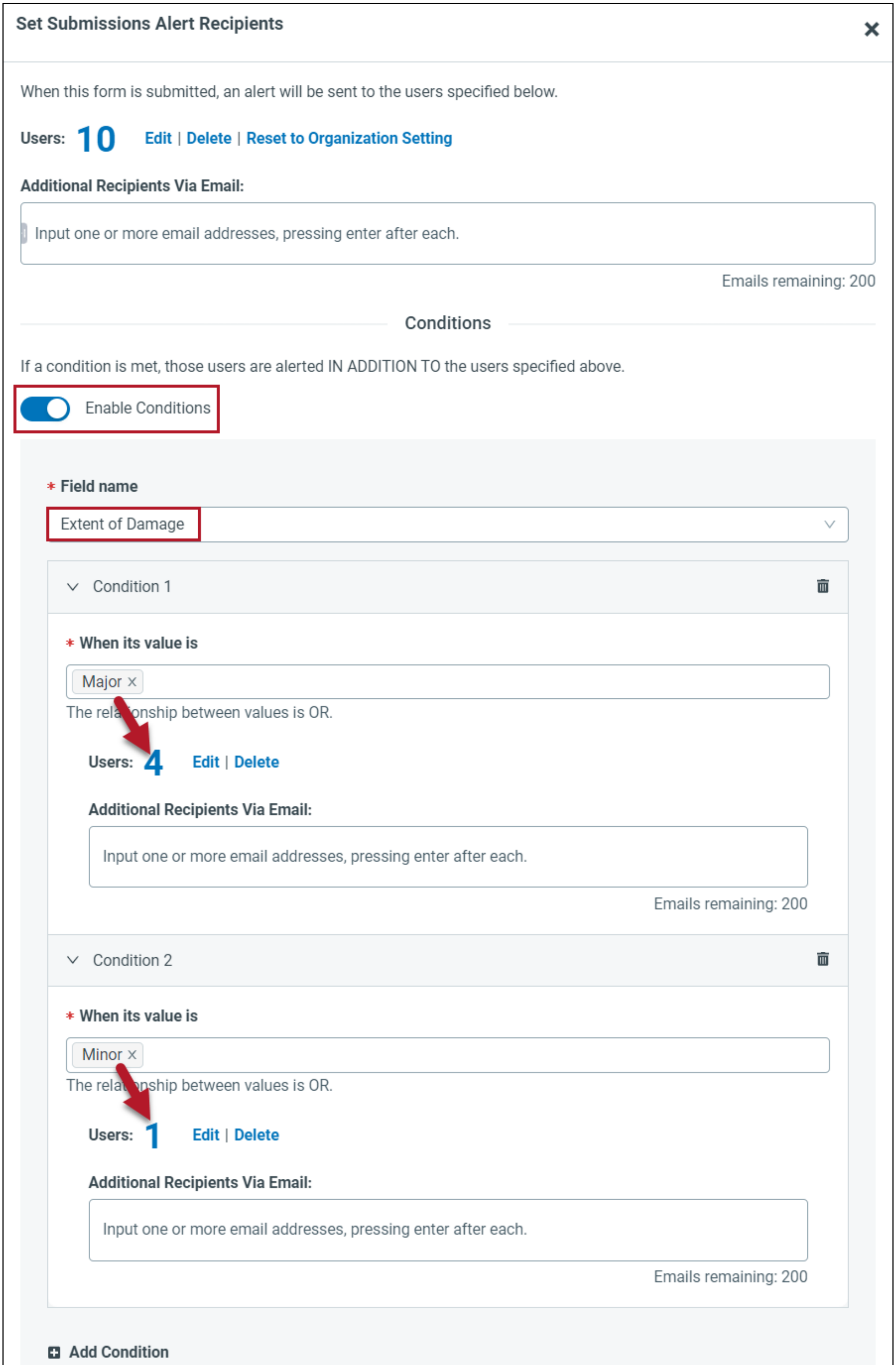
1. In the Form Library, click **Edit Form** on the desired entry.
2. Click the **Settings** drop-down near the top-right corner and choose **Request Folder**.
3. Select the **Field Name** from the drop-down. Doing so will open the corresponding options for that data point.
    - Choose the parameters or relationship for the selected field.
    - Designate the folder that will receive these requests.
    - Note that you can add multiple settings here to customize your routing options.
4. Click **Save** to finish.

Set Submission Alert Recipients

Forms can be configured to automatically alert specific recipients based on conditional criteria configured in the **Form Library.**

1. Select the checkbox for the desired Form. The **Actions** menu button will be activated.
2. Click the **Actions** button and select **Set Submission Alert Recipients** from the dropdown menu.
3. A popup page will appear. In the top section, select the **Users** who should be alerted regardless of the data collected by the Form responses. The email addresses of additional recipients can be added here, as well.
4. Click the **Enable Conditions** toggle to populate the **Conditions** section.

5. Under the **Conditions** section, select the data fields that will determine the additional recipients based on the Form responses.
6. Set the conditional values for each field.
7. Select the **Users** that will automatically receive these alerts based on the outlined Conditions. Additional recipients can also be notified by email when applicable.
8. Click **Save**.


Set Submissions Alert Recipients
When this form is submitted, an alert will be sent to the users specified below.
Users: 10 Edit | Delete | Reset to Organization Setting
Additional Recipients Via Email:
Input one or more email addresses, pressing enter after each.
Emails remaining: 200
Conditions
If a condition is met, those users are alerted IN ADDITION TO the users specified above.
Enable Conditions
* Field name
Extent of Damage
Condition 1
* When its value is
Major ×
The relationship between values is OR.
Users: 4 Edit | Delete
Additional Recipients Via Email:
Input one or more email addresses, pressing enter after each.
Emails remaining: 200
Condition 2
* When its value is
Minor ×
The relationship between values is OR.
Users: 1 Edit | Delete
Additional Recipients Via Email:
Input one or more email addresses, pressing enter after each.
Emails remaining: 200
Add Condition

Form Components

You can customize the majority of the Form components by inputting values in their corresponding subtabs.

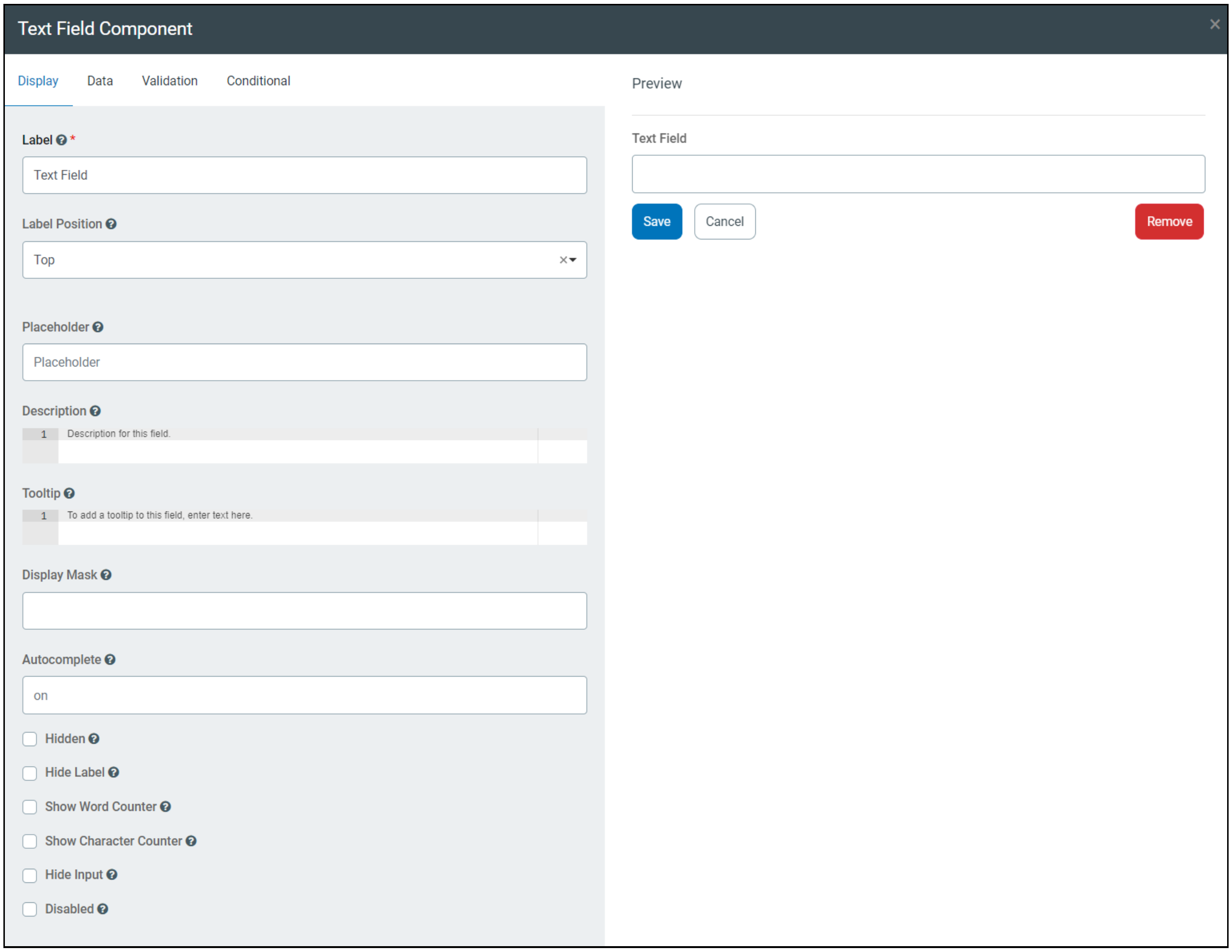
- **Display**—To configure the look and feel of the component.
- **Data**—To set up the values of the components.
- **Validation**—To put in boundaries for the component, such as length, pattern, error messages, and so forth.
- **Conditional**—To set up logic when this component should be shown or hidden.

Basic Components

See the following dialogs of each component.

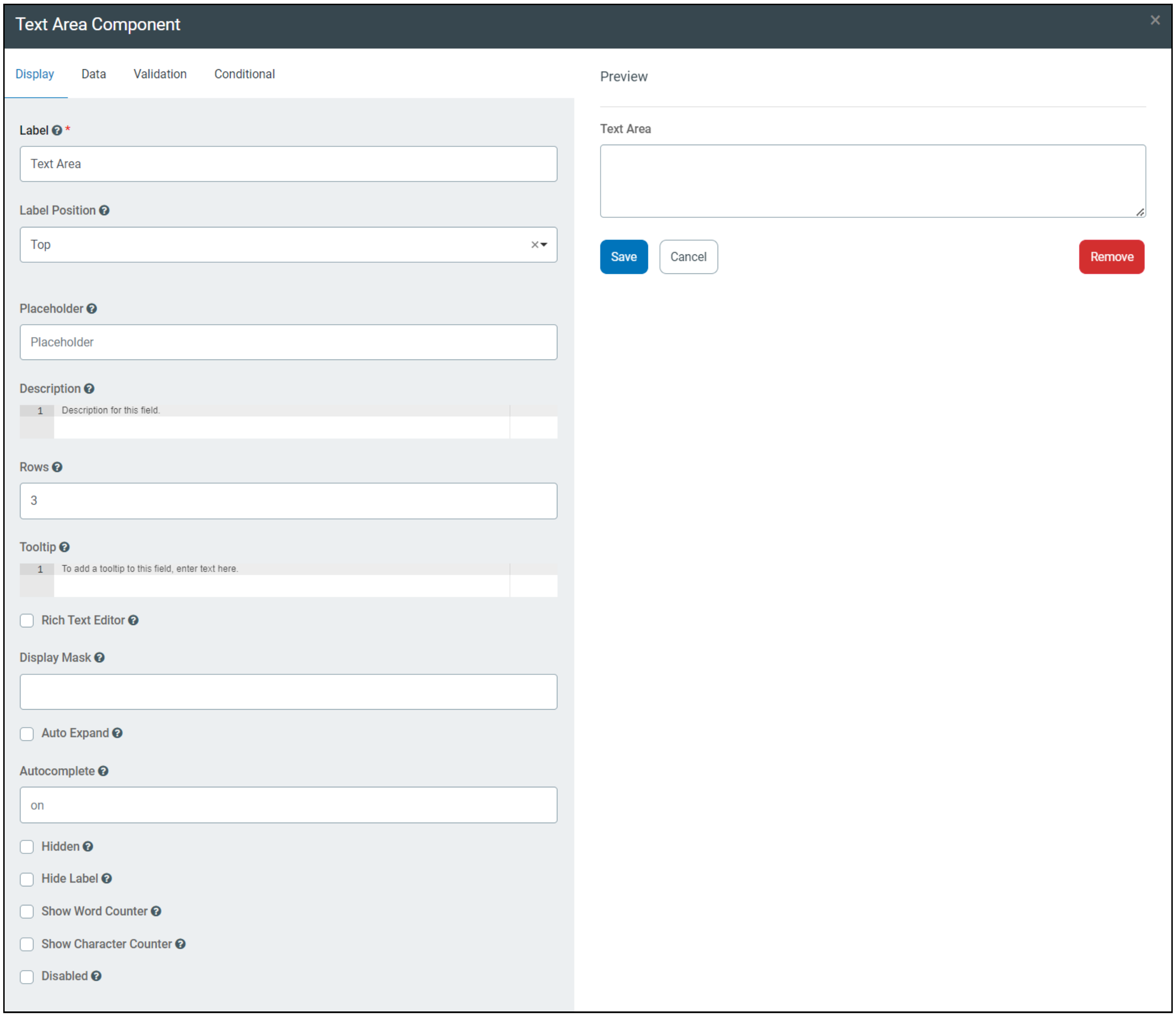
Text Field

A **Text Field** can be used for short and general text input. There are options to define validations, allowing users to use the desired formatting.



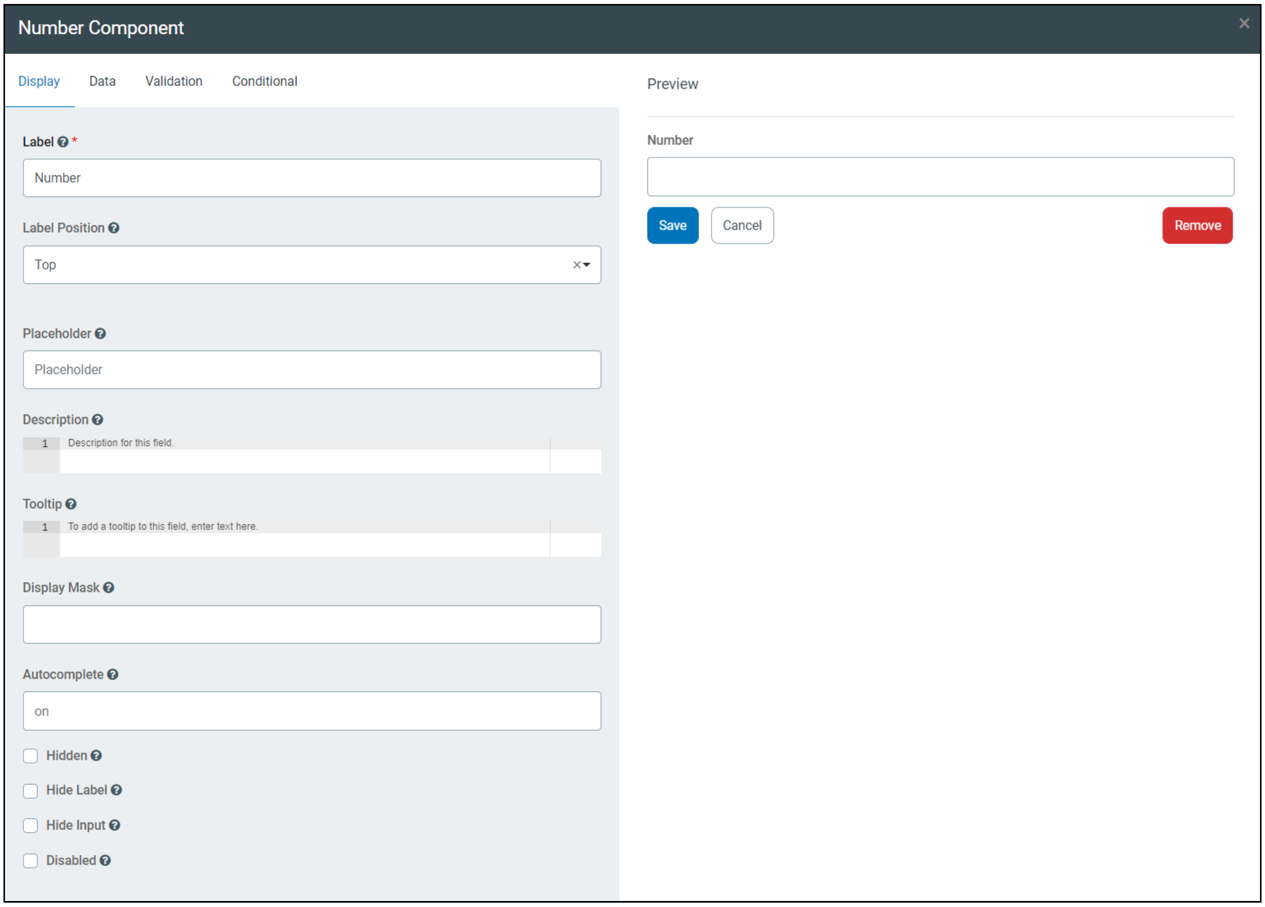
Text Area

A Text Area field has the same options as the Text Field component. The difference is that a Text Area field is a multi-line input field that allows for longer text.



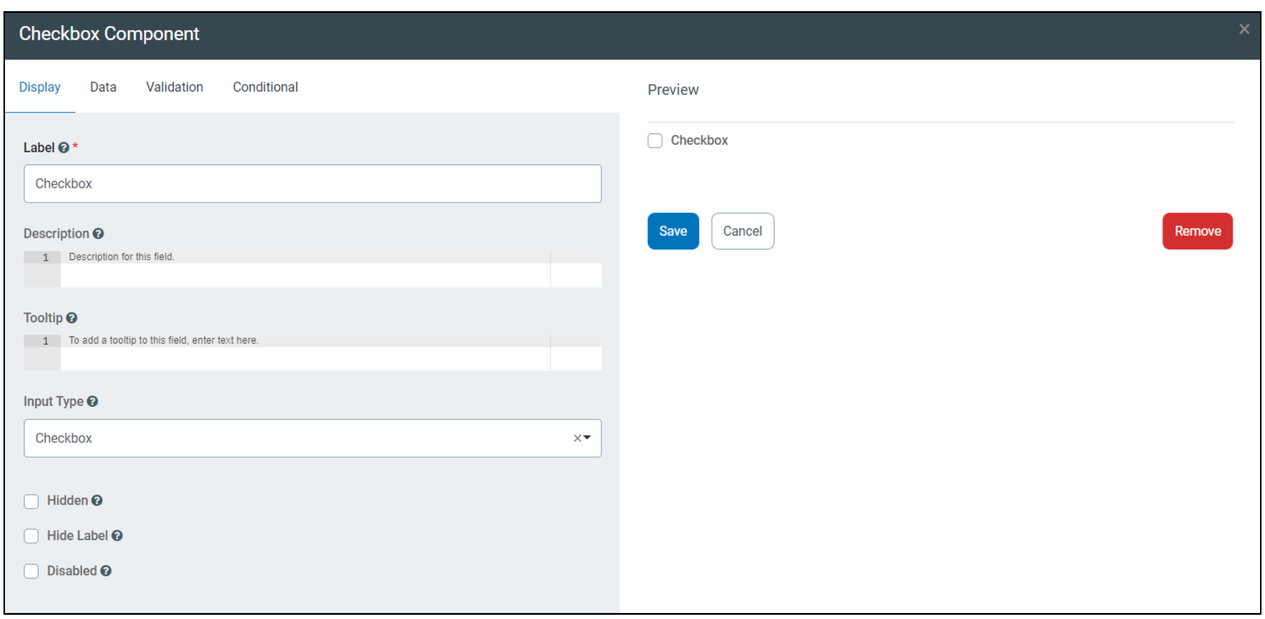
Number

Number fields should be used whenever a field should be limited to a number or digit value.



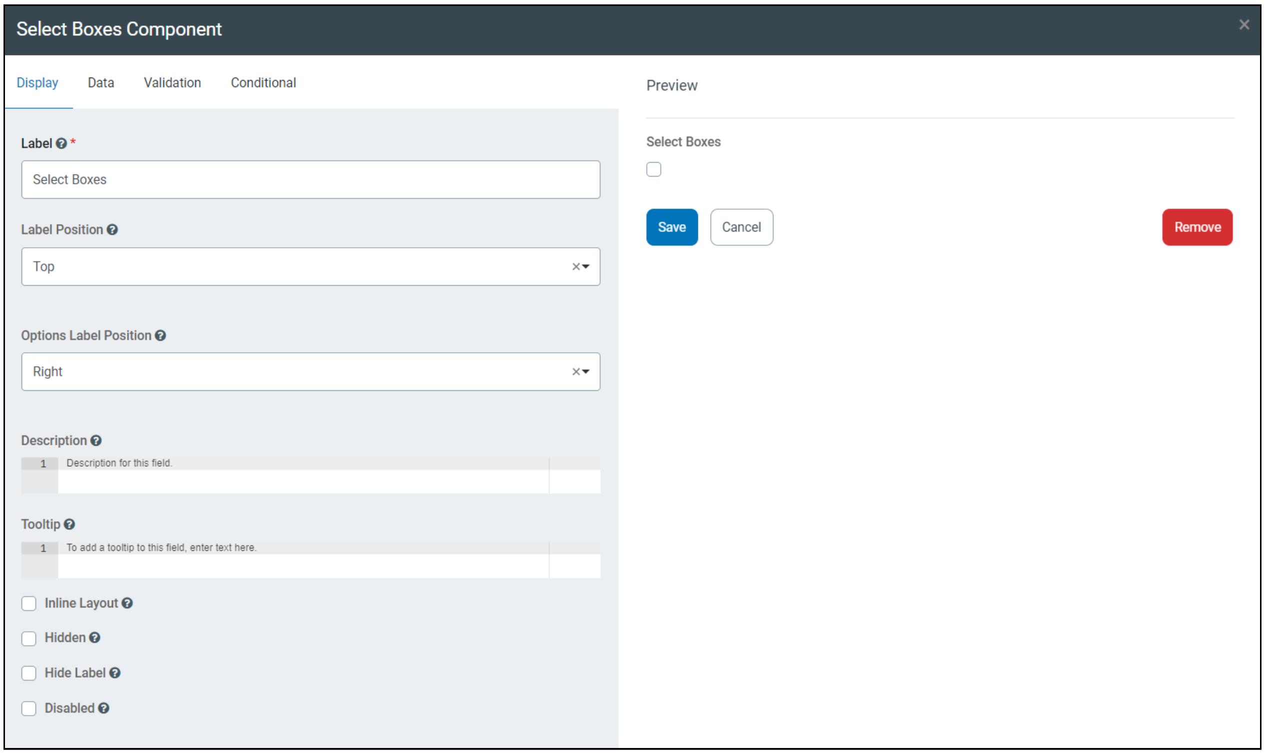
Checkbox

A **Checkbox** is a Boolean value input field. It can be either on or off.



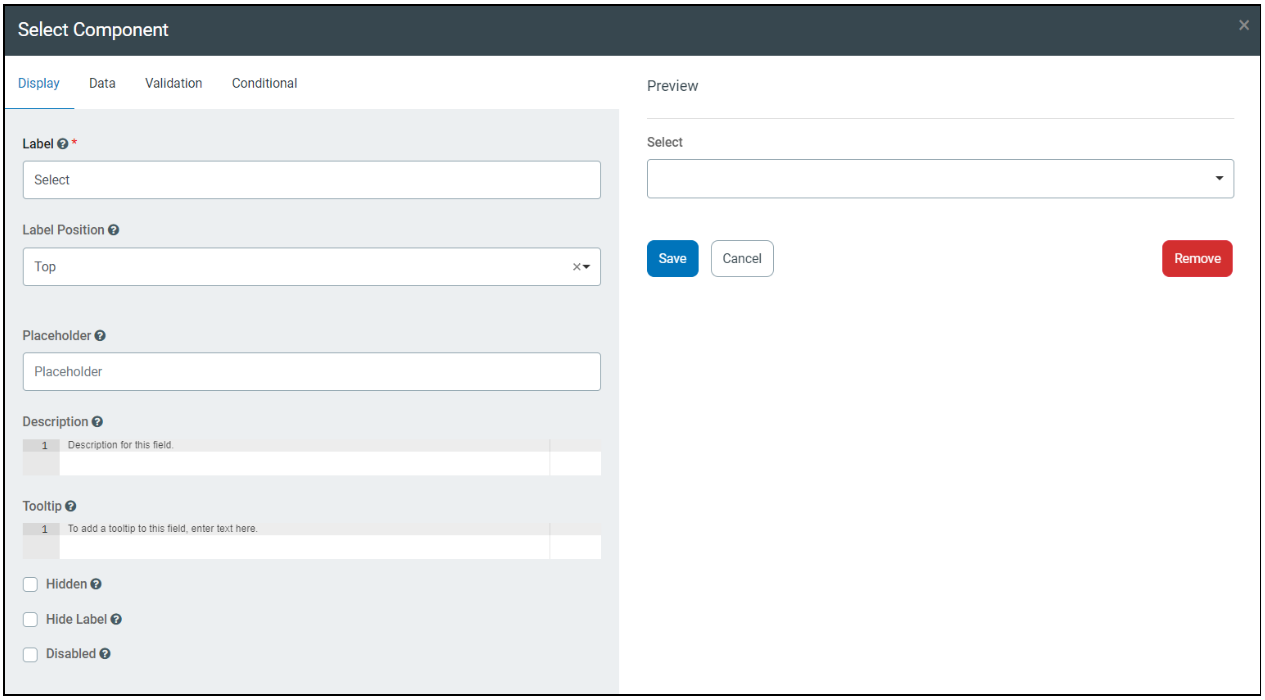
Select Boxes

The **Select Boxes** component works like the Radio component but allows the user to select multiple values.



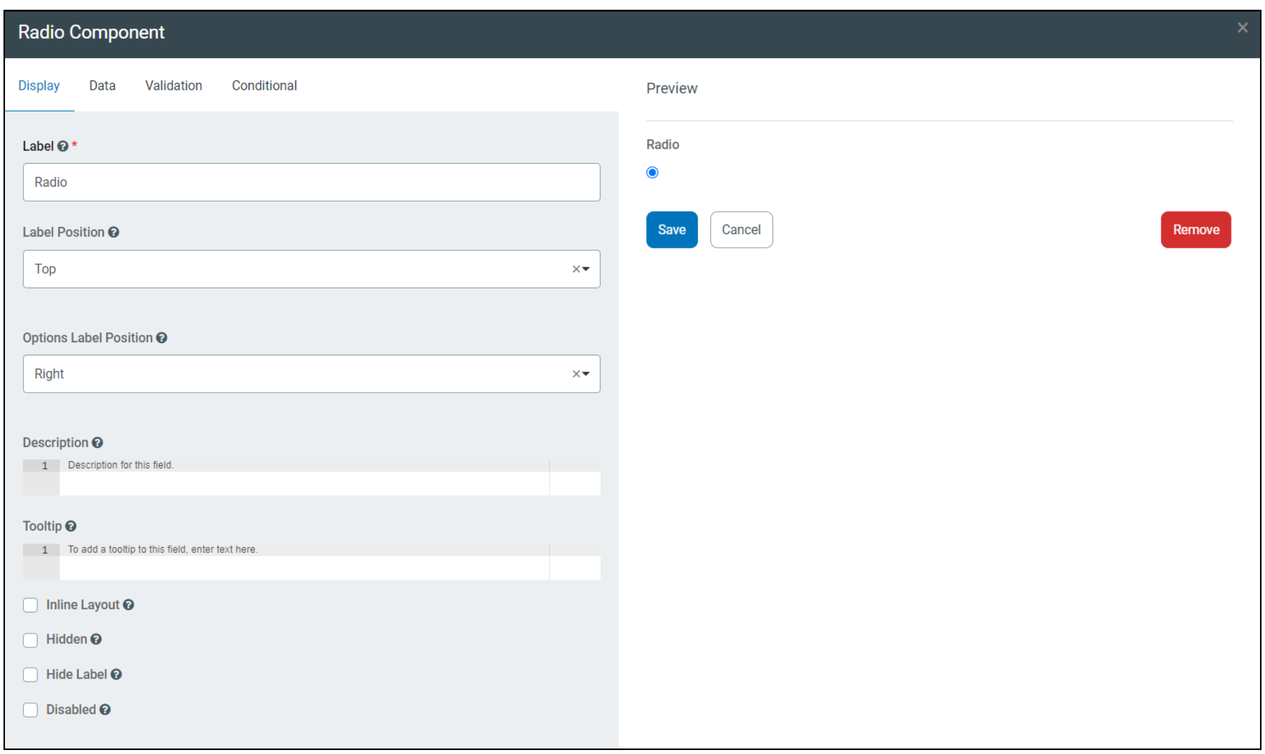
Select

A **Select** field will display a list of values from a drop-down list. Users can select one of the values.



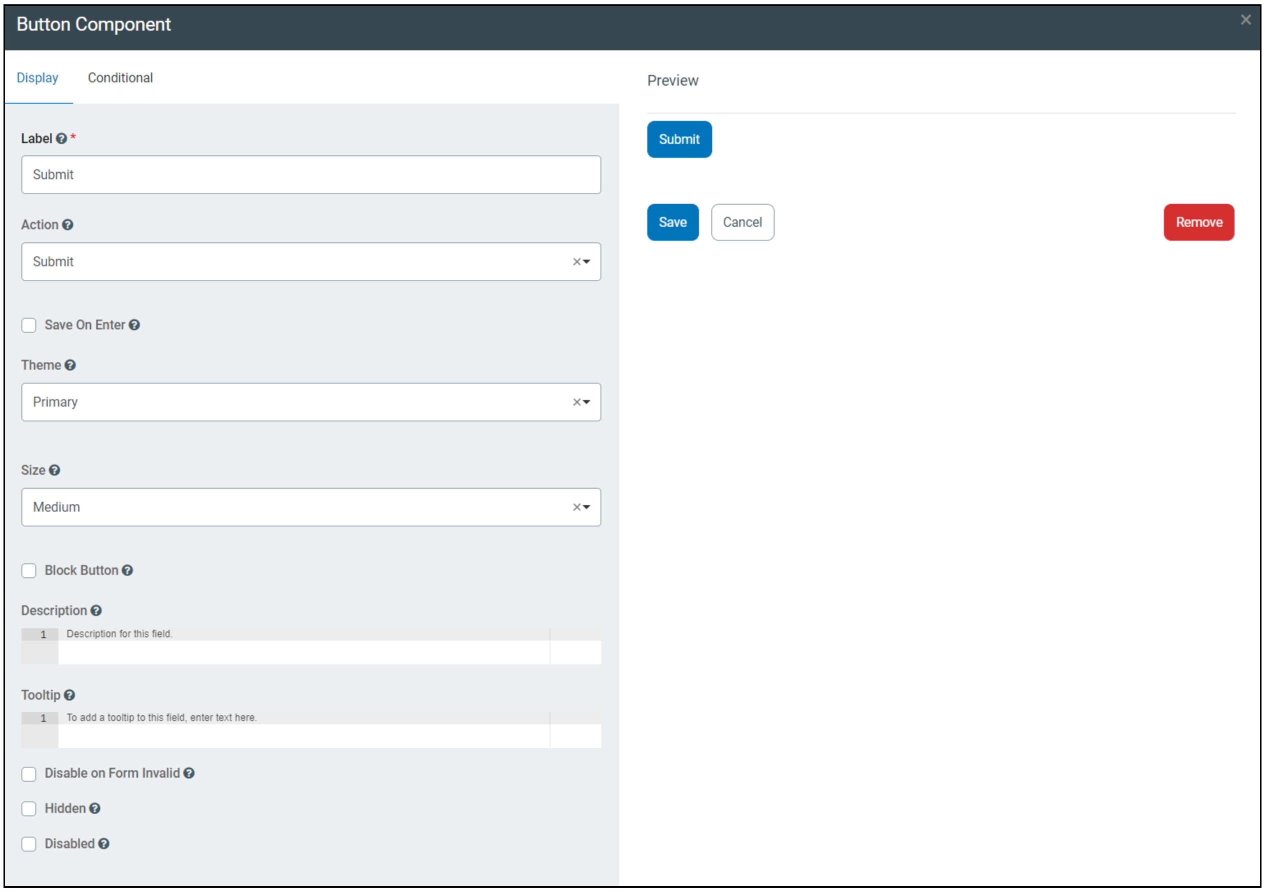
Radio

Radio components should be used when presenting a list of options from which one can be selected.



Button

Buttons can be added to perform various actions within the Form.

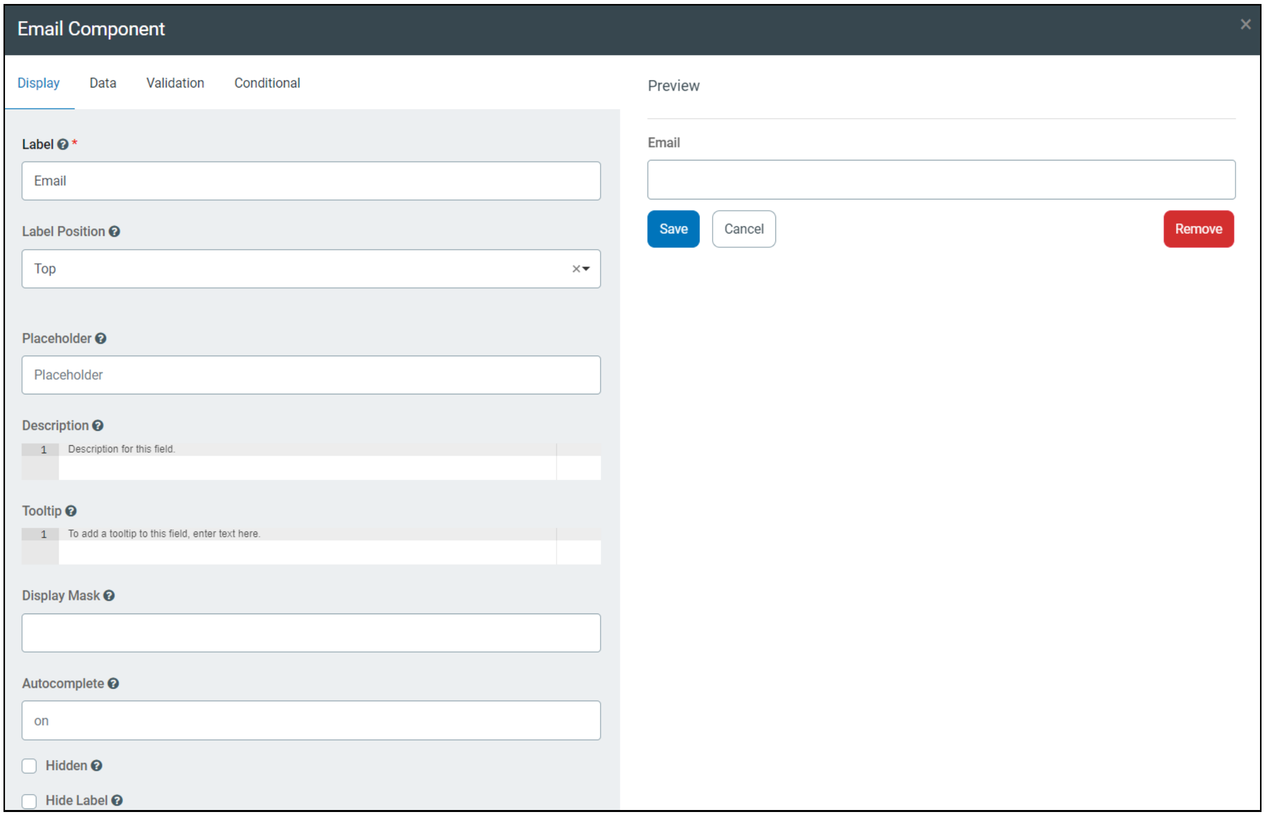


Advanced Components

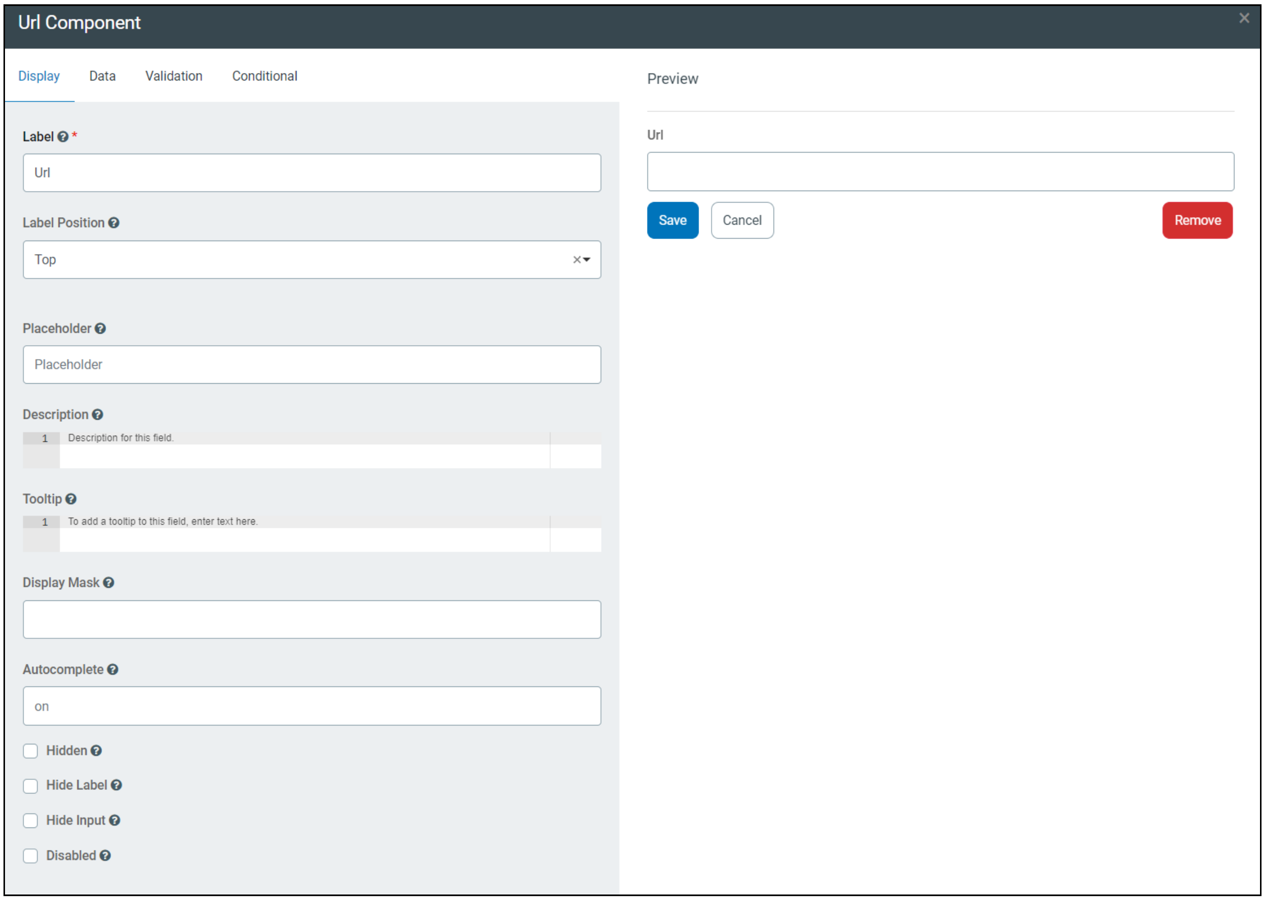
See the following dialogs of each component.

Email

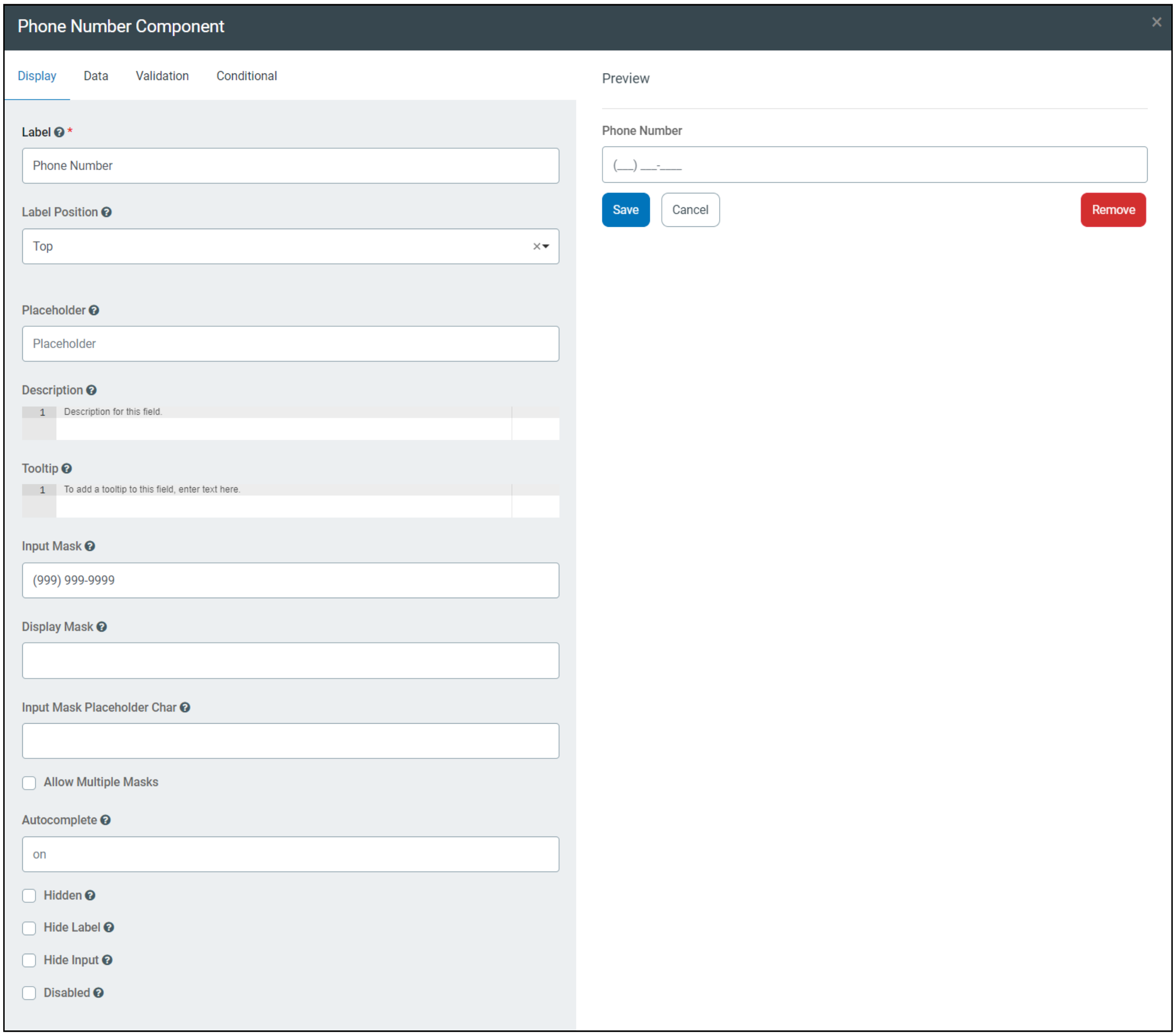
The **Email** component is similar to the Text Field component. The Email component has a custom validation setting that can ensure the value entered is a valid email address. The Email component can also more easily be integrated into a Form's email action. Use this component when you want an email address field for your Form.


Email Component
Display
Data
Validation
Conditional
Label
Email
Label Position
Top
Placeholder
Placeholder
Description
1 Description for this field.
Tooltip
1 To add a tooltip to this field, enter text here.
Display Mask
Autocomplete
on
Hidden
Hide Label
Preview
Email
Save
Cancel
Remove

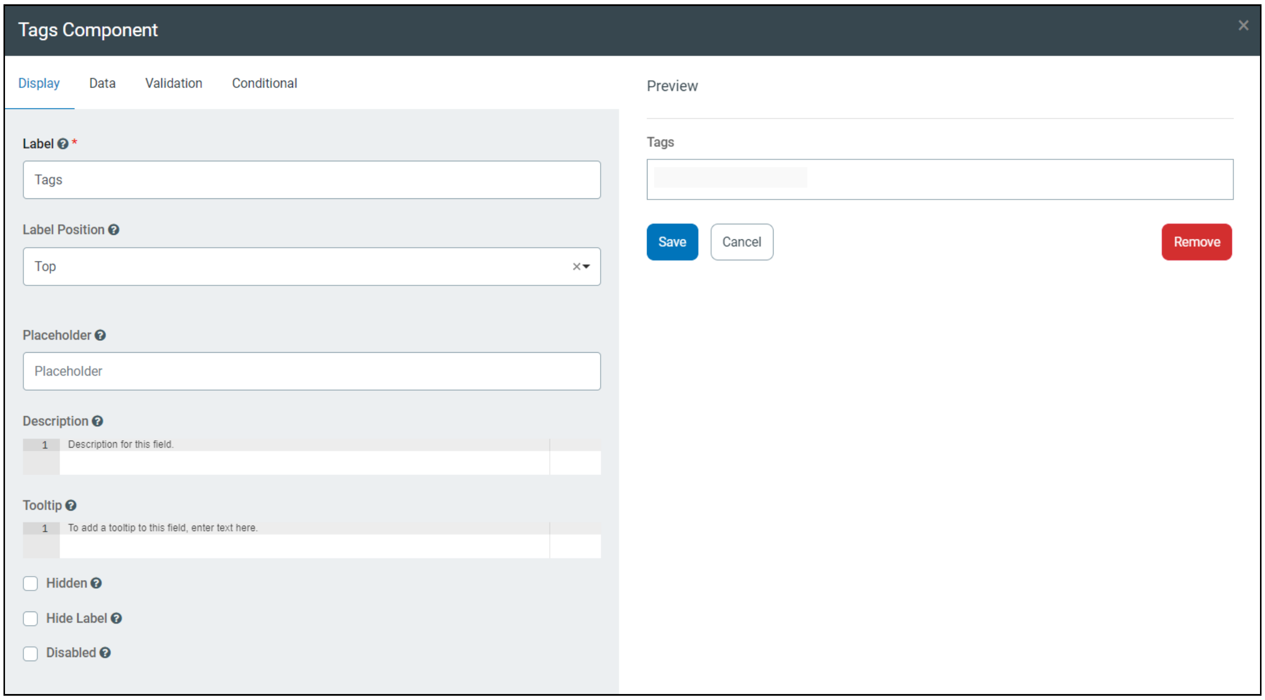
URL


Url Component
Display
Data
Validation
Conditional
Label *
Url
Label Position
Top
Placeholder
Placeholder
Description
1
Description for this field.
Tooltip
1
To add a tooltip to this field, enter text here.
Display Mask
Autocomplete
on
Hidden
Hide Label
Hide Input
Disabled
Preview
Url
Save
Cancel
Remove

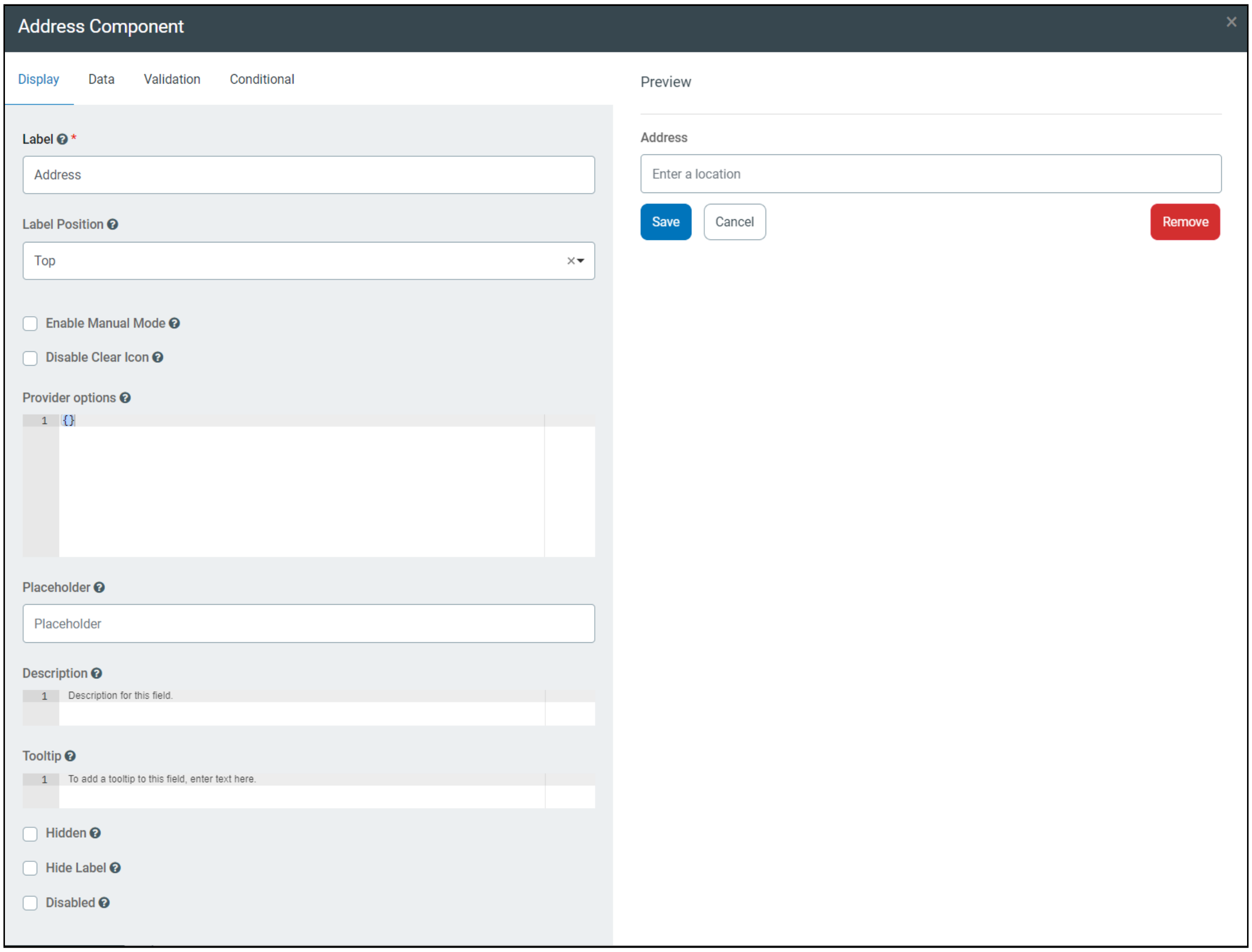
Phone Number



Tags

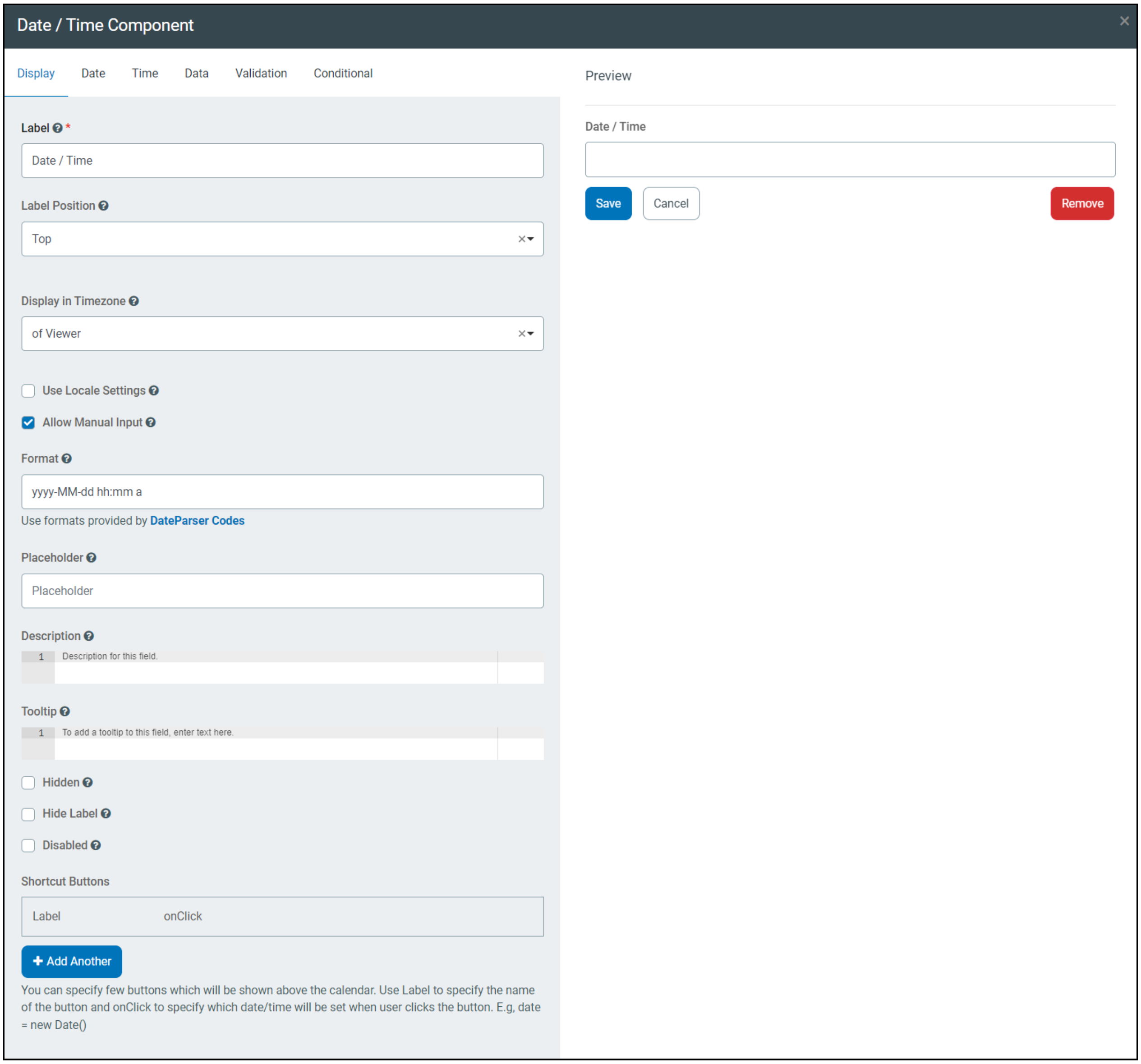

Tags Component
Display
Data
Validation
Conditional
Label
Tags
Label Position
Top
Placeholder
Placeholder
Description
Description for this field.
Tooltip
To add a tooltip to this field, enter text here.
Hidden
Hide Label
Disabled
Preview
Tags
Save
Cancel
Remove

Address

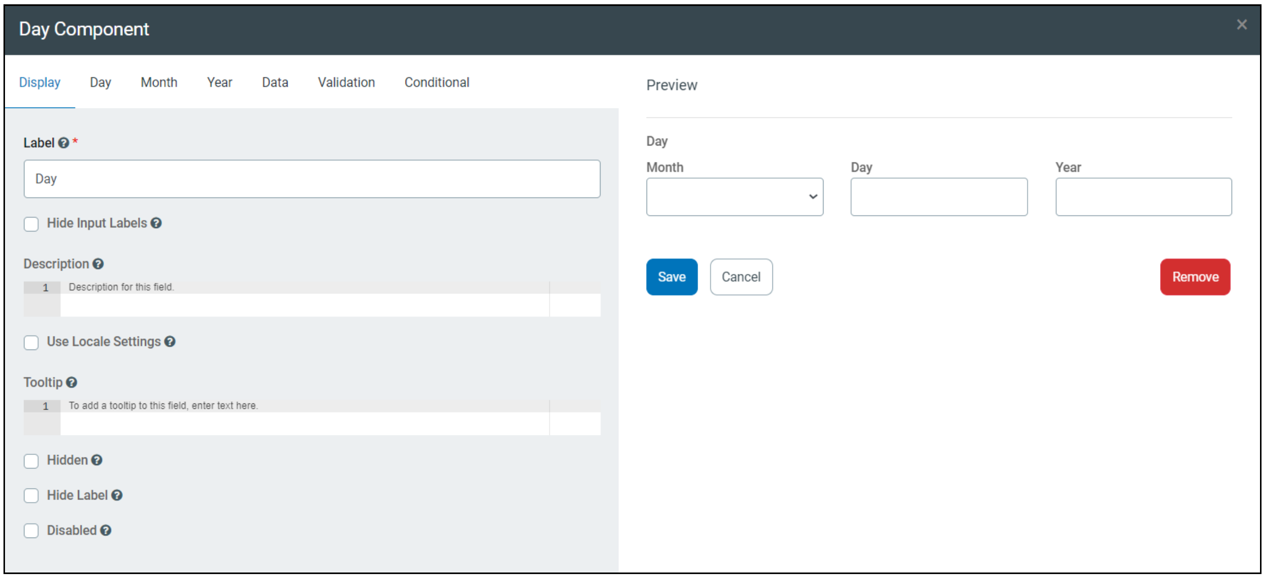


Date/Time

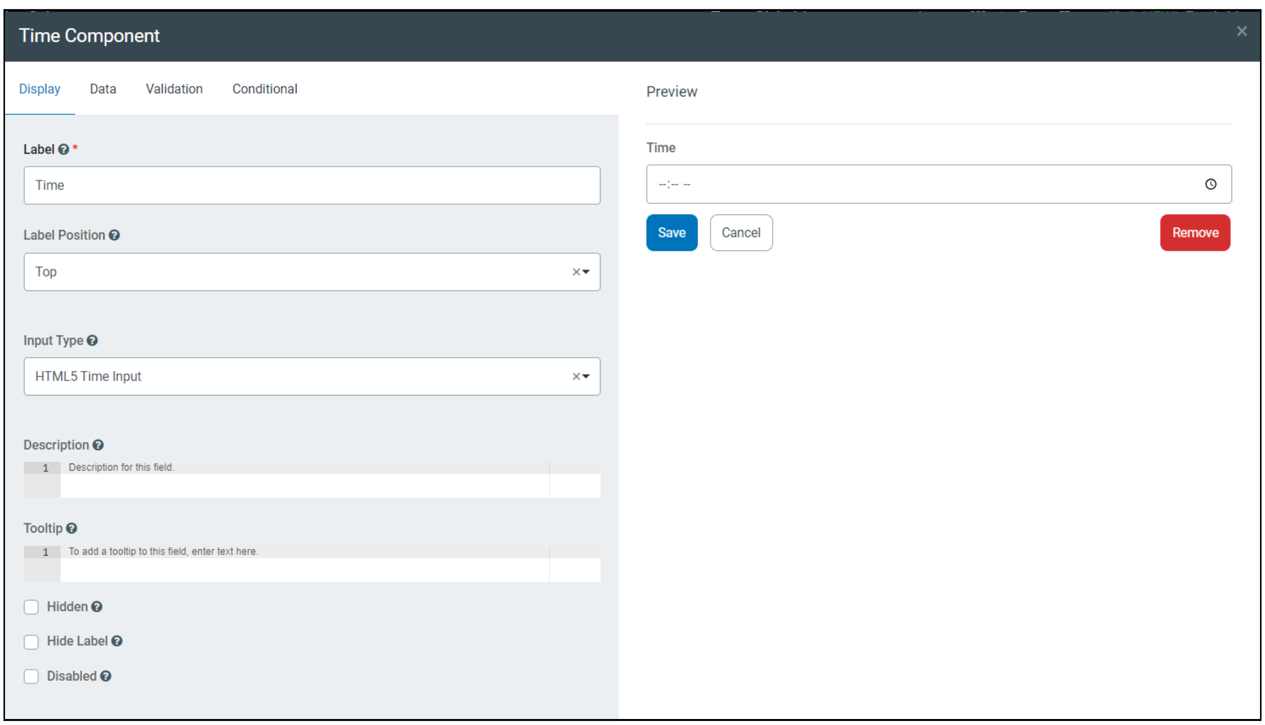
The **Date/Time** components can be used to input dates, time, or both dates and times.


Date / Time Component
Display
Date
Time
Data
Validation
Conditional
Preview
Label
Date / Time
Label Position
Top
Display in Timezone
of Viewer
Use Locale Settings
Allow Manual Input
Format
yyyy-MM-dd hh:mm a
Use formats provided by DateParser Codes
Placeholder
Placeholder
Description
Description for this field.
Tooltip
To add a tooltip to this field, enter text here.
Hidden
Hide Label
Disabled
Shortcut Buttons
Label
onClick
Add Another
You can specify few buttons which will be shown above the calendar. Use Label to specify the name of the button and onClick to specify which date/time will be set when user clicks the button. E.g, date = new Date()
Date / Time
Save
Cancel
Remove

Day

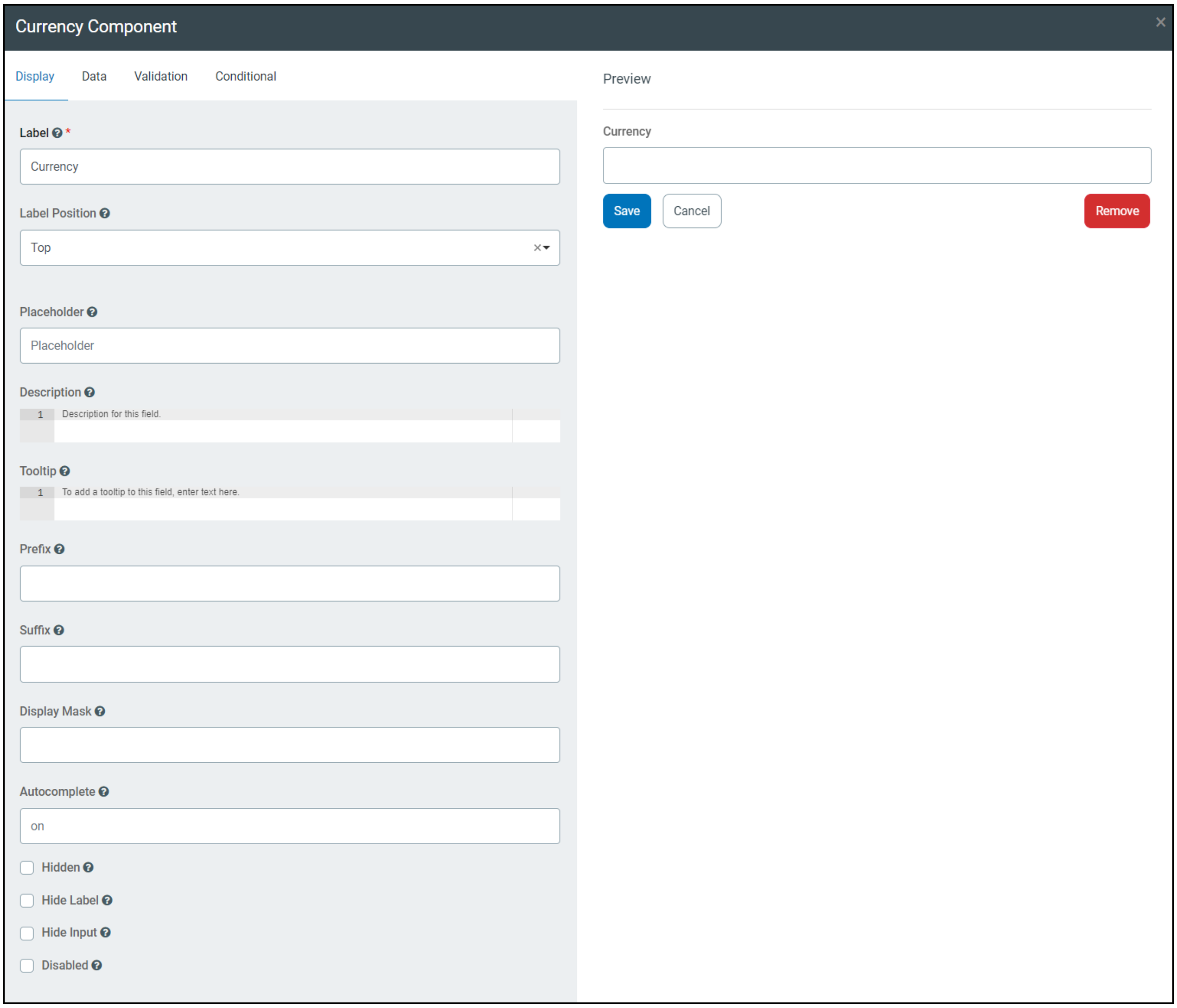


Time



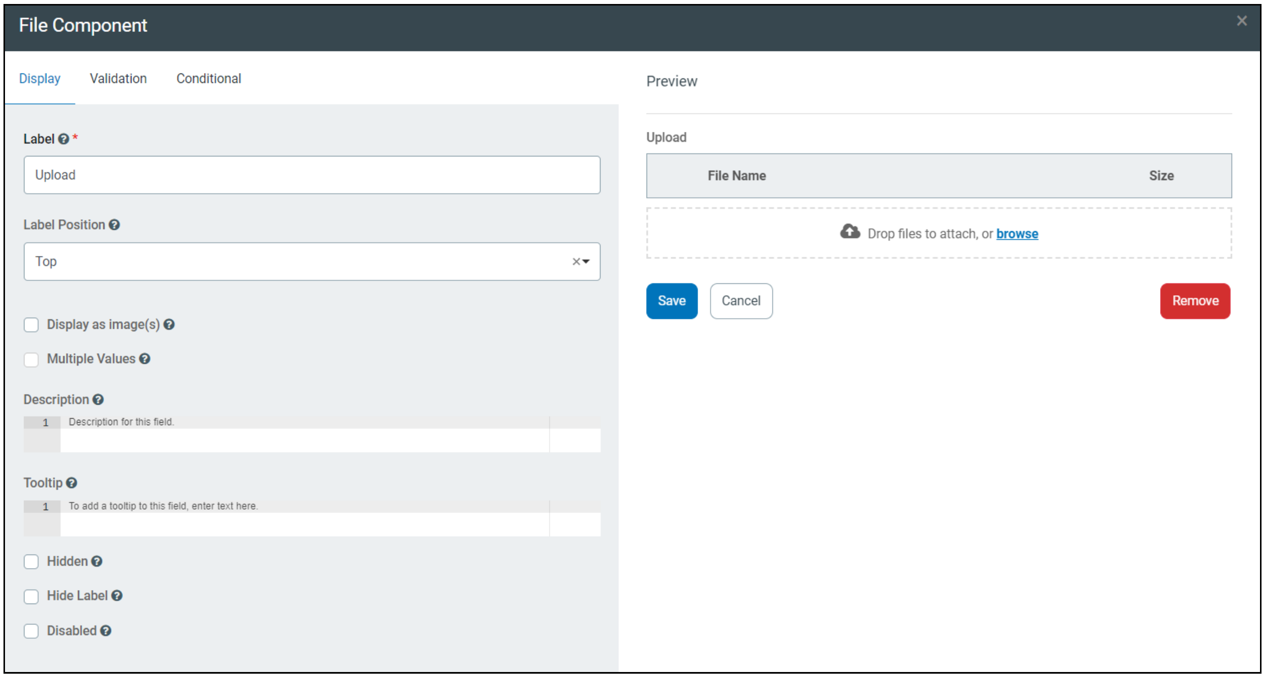
Currency

The **Currency** component should be used when a field should display currency amounts on a Form. This component holds a numeric input mask that allows two decimal values and automatically adds commas as a user inputs a currency amount.



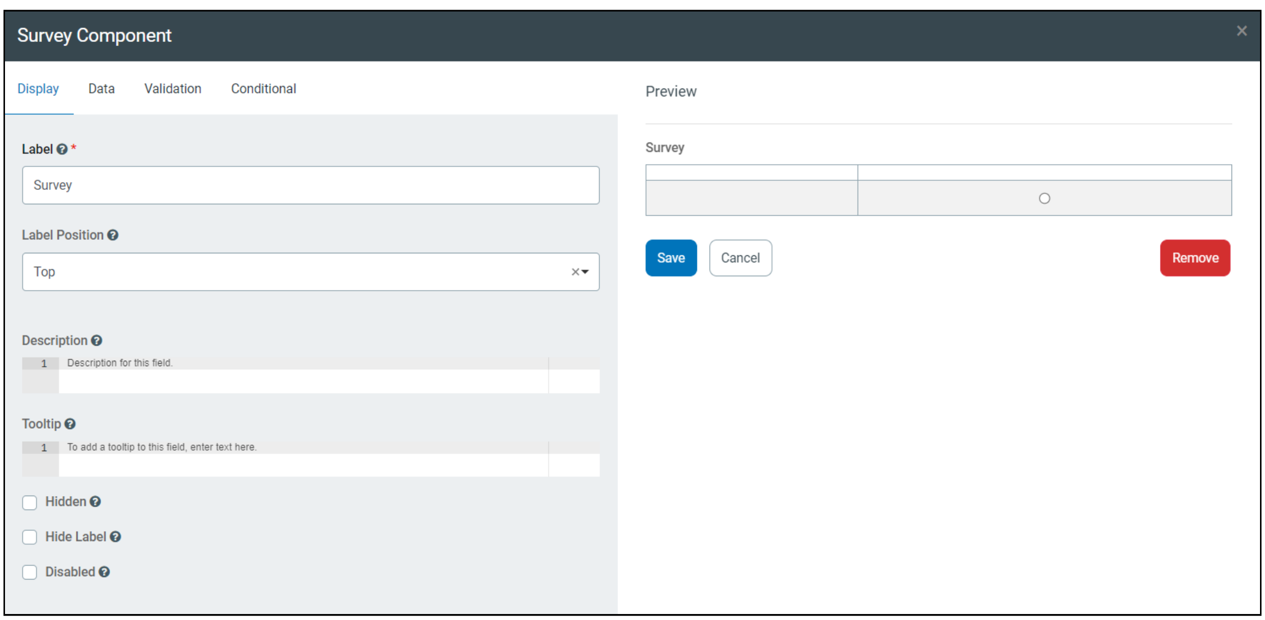
File

A **File** field allows users to upload and download files to a Form. In order to use a File field, file storage must be set up. Files are stored on the storage provider which allows uploading and downloading files to and from it.



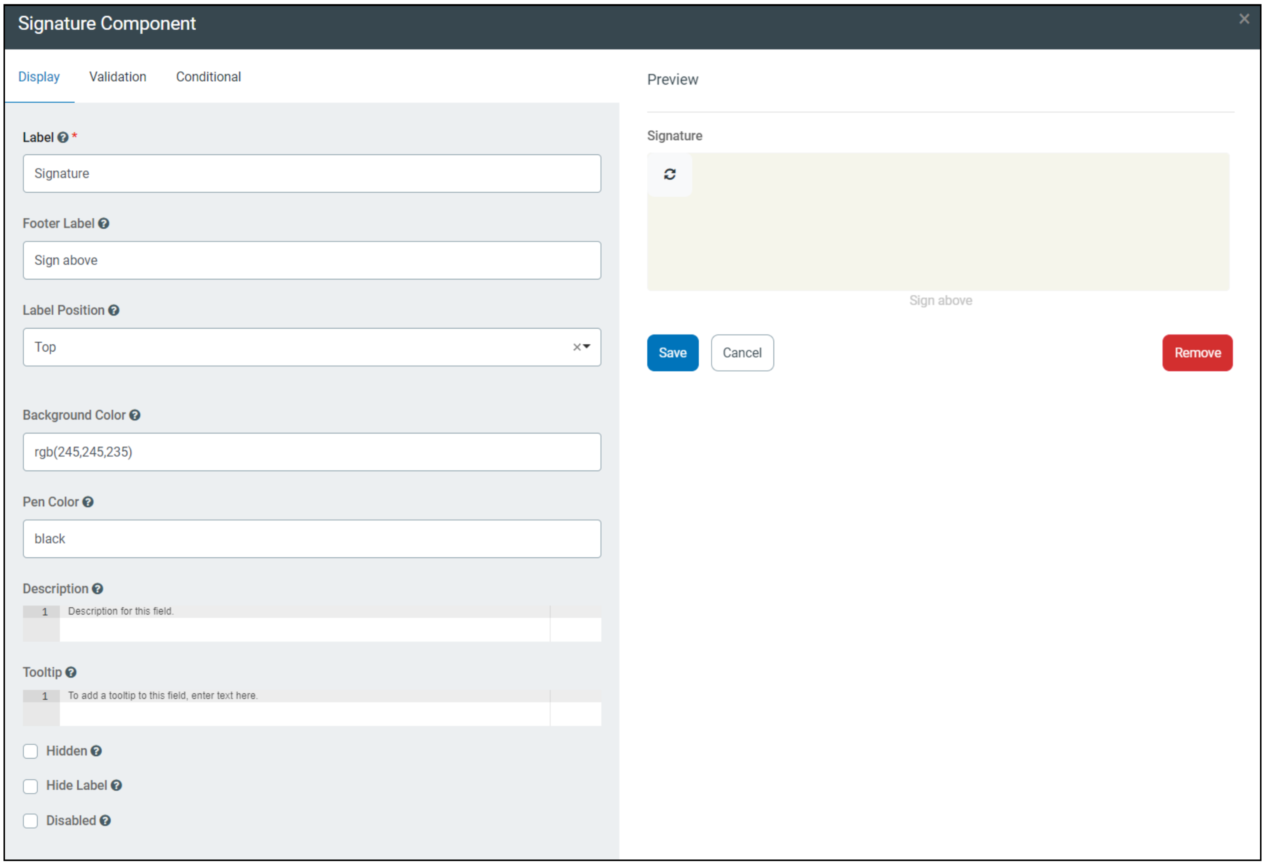
Survey

The Survey component works like the Radio component. Instead of one question, users are able to select a value for multiple questions that are configured with the component settings. Survey is a great component to utilize when asking multiple questions with the same context of answers or values.



Signature

A Signature field is a special field that allows someone to sign the field with either their finger on a touch-enabled device or with the mouse pointer. This signature will be converted into an image and stored with the Form submission.

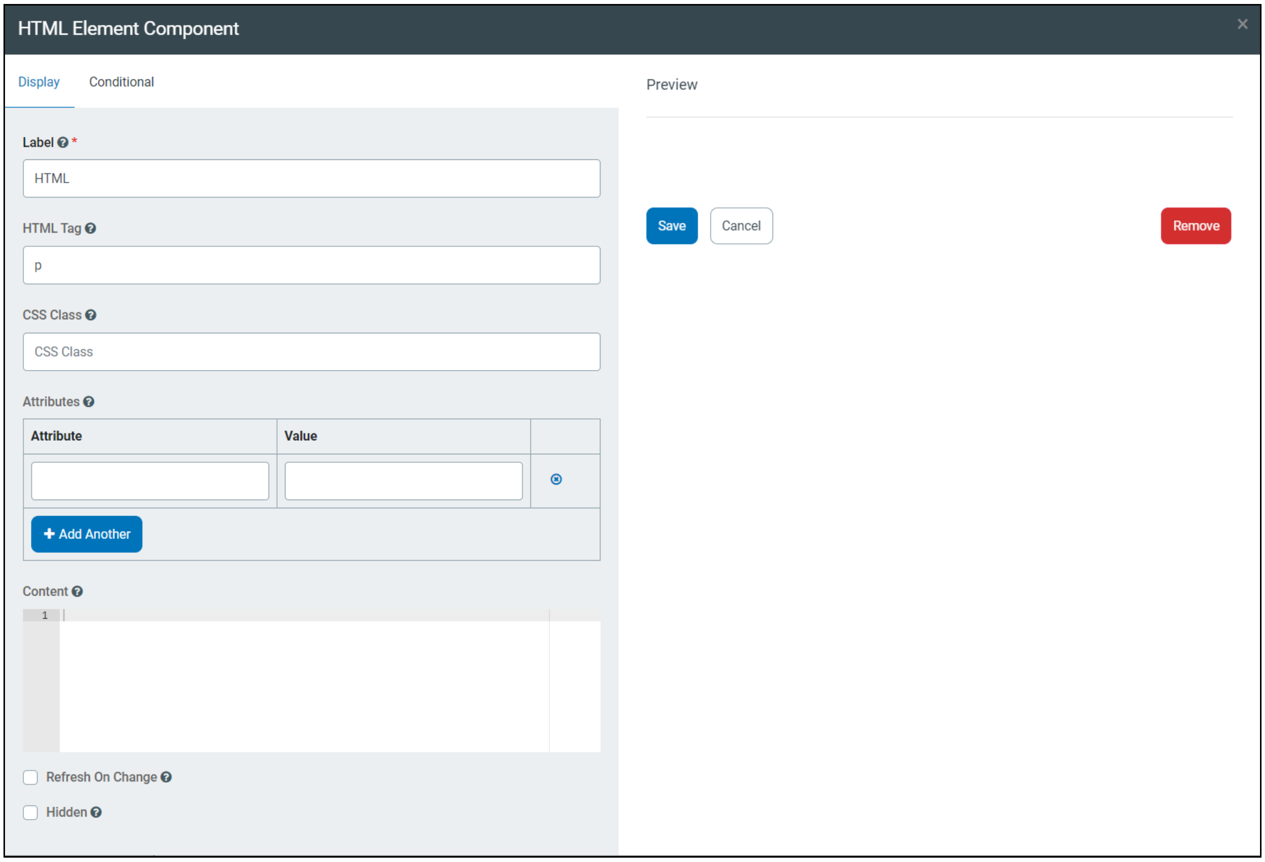


Layout

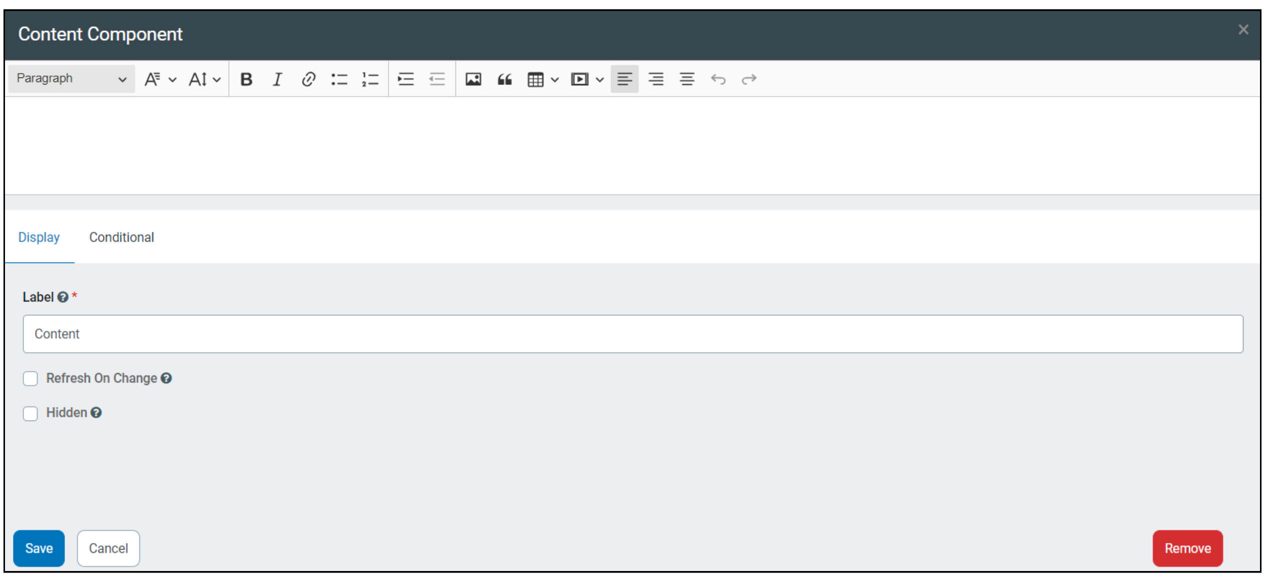
See the following dialogs of each component.

HTML Element

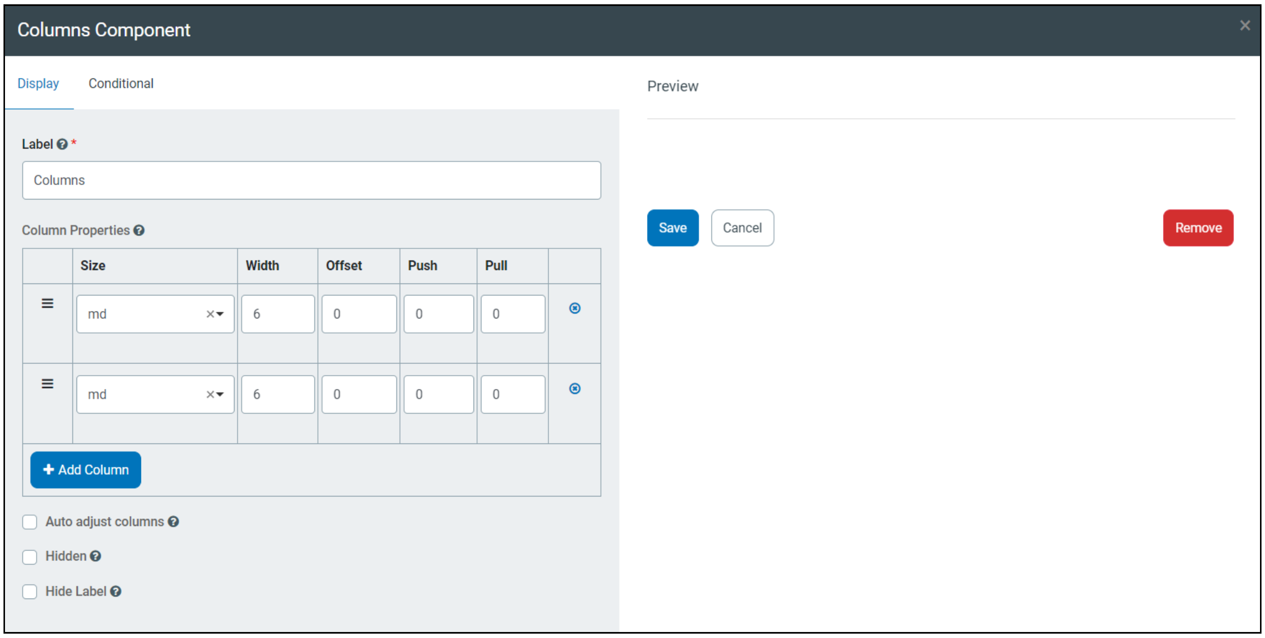
An **HTML Element** component can be added to a Form to display a single HTML element.


HTML Element Component
Display
Conditional
Preview
Label
HTML
HTML Tag
p
CSS Class
CSS Class
Attributes
Attribute
Value
Add Another
Content
Refresh On Change
Hidden
Save
Cancel
Remove

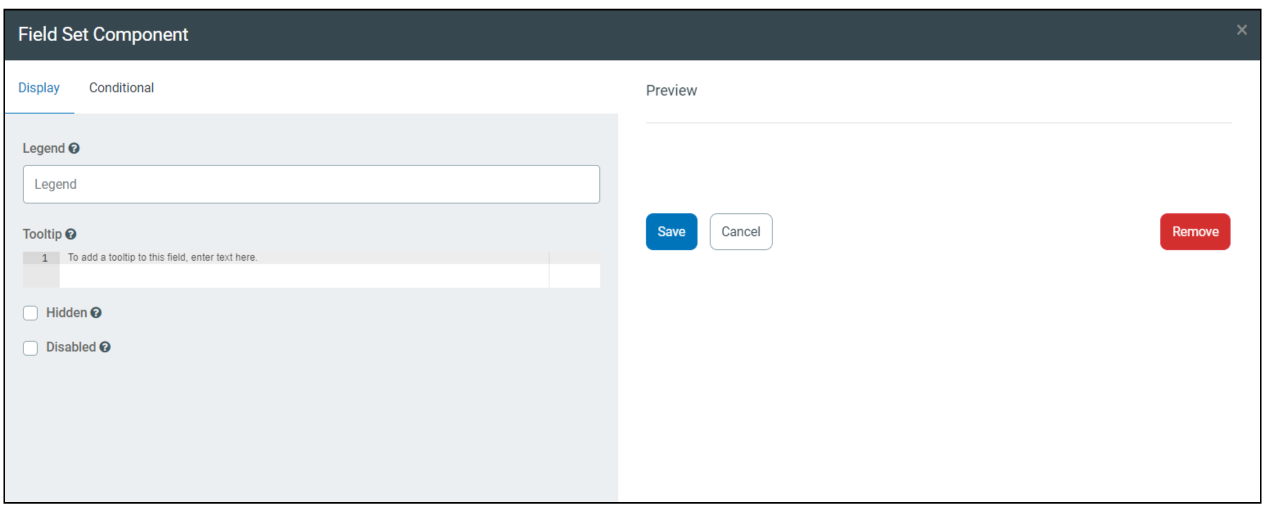
Content


Content Component
Paragraph
Display
Conditional
Label
Content
Refresh On Change
Hidden
Save
Cancel
Remove

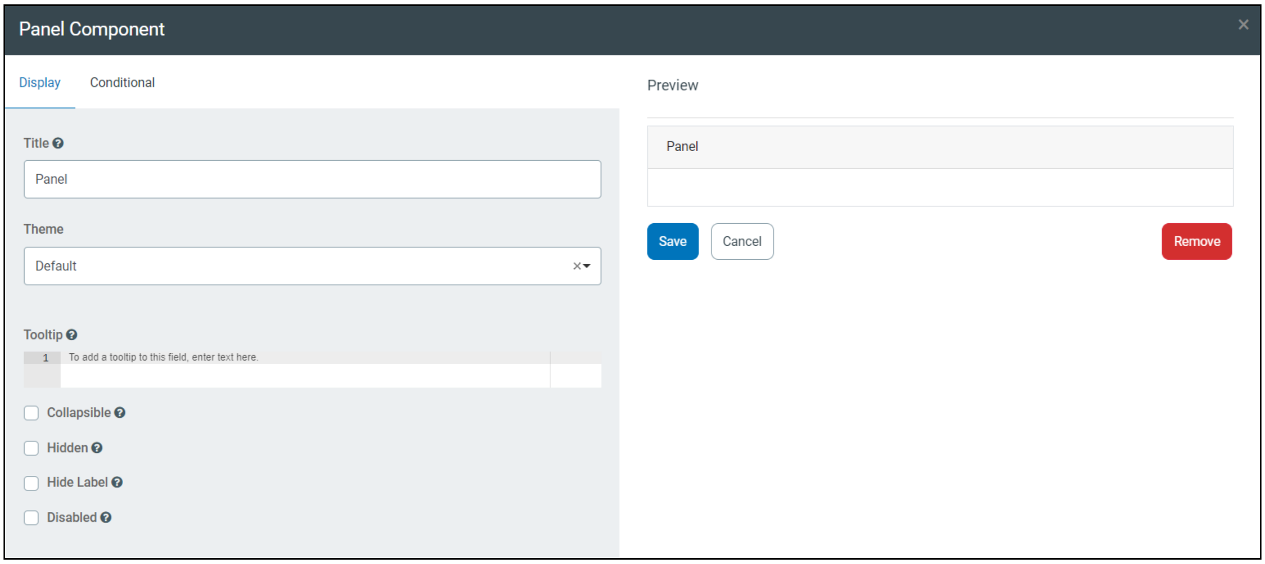
Columns



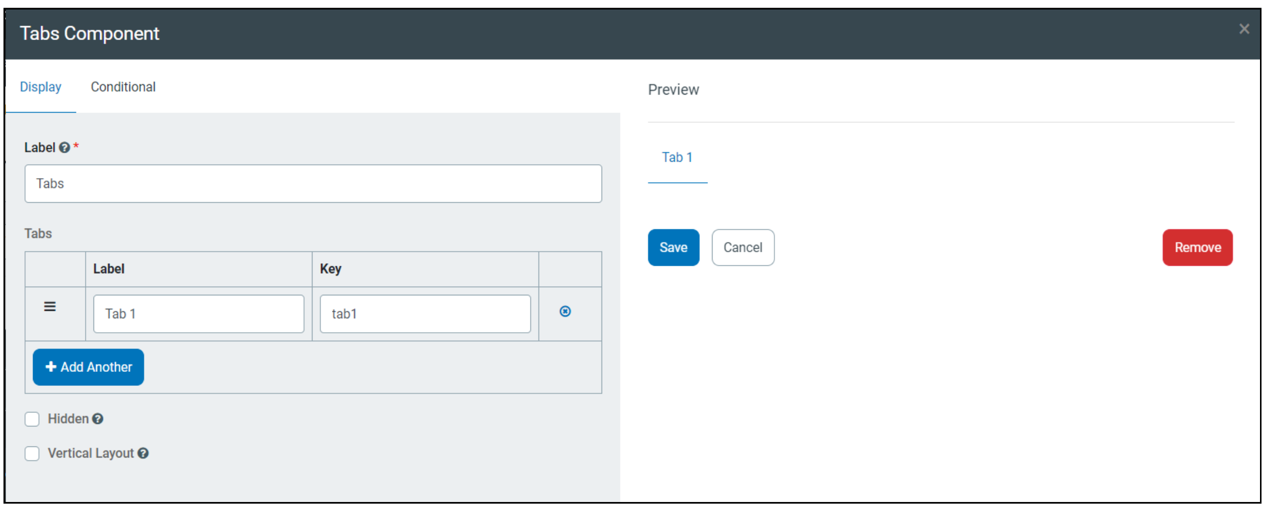
Field Set



Panel



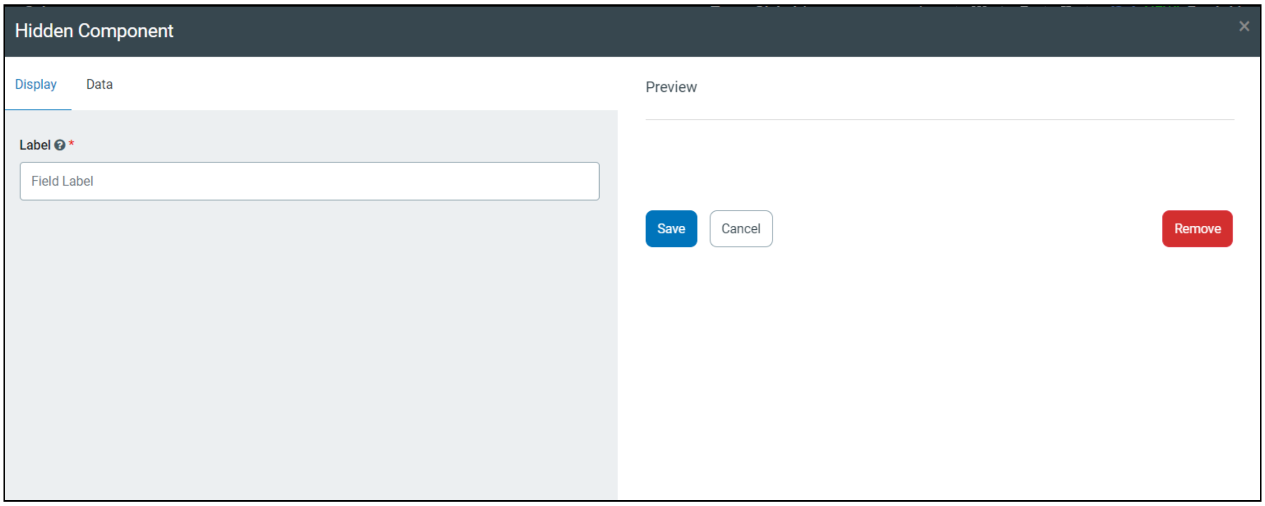
Tabs



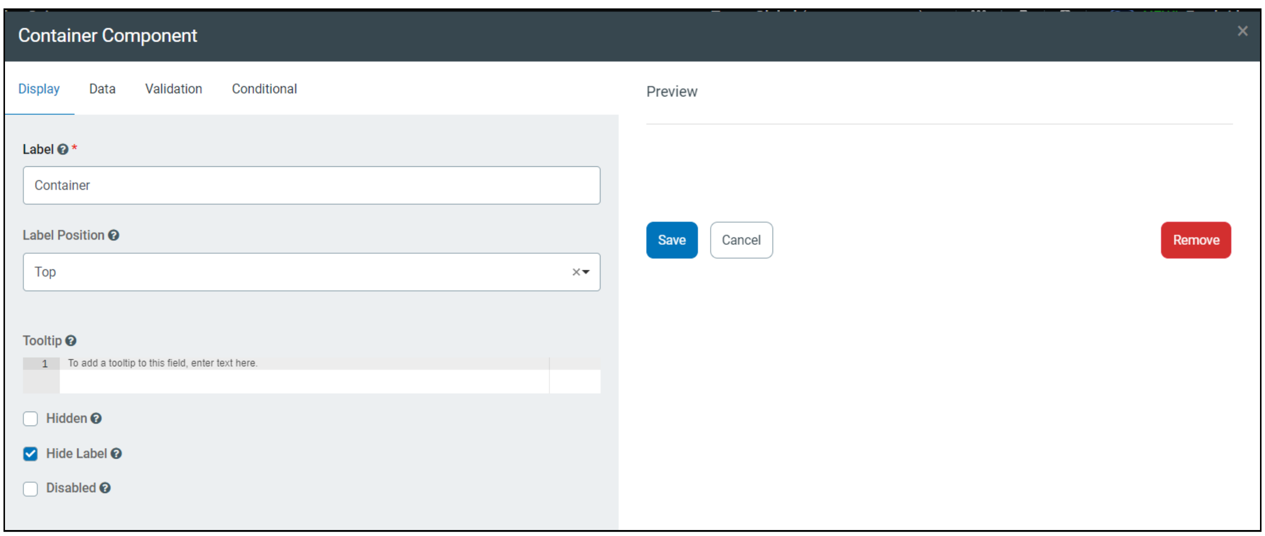
Data

See the following dialogs of each component.

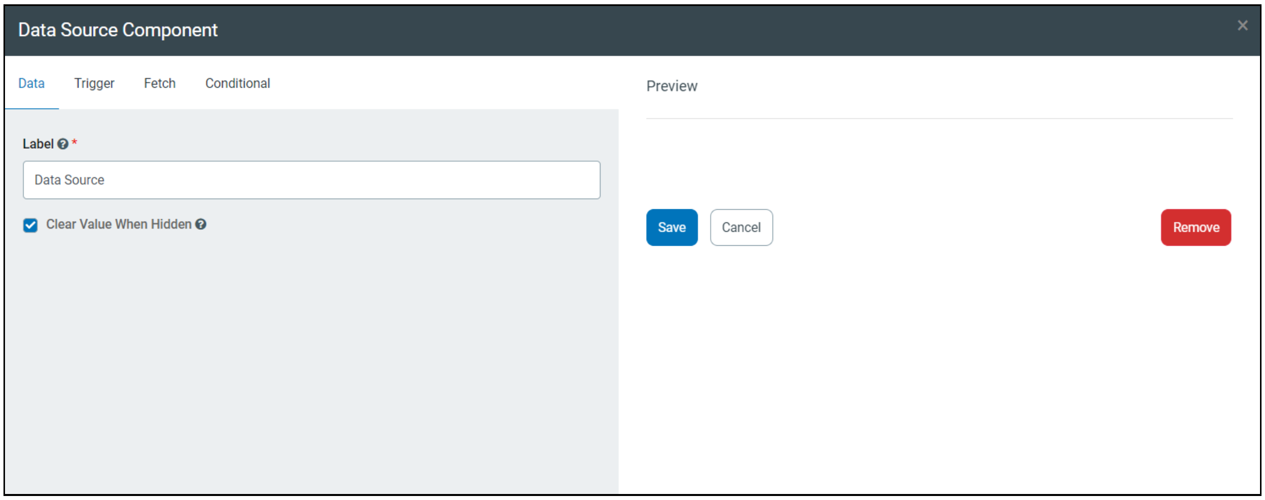
Hidden



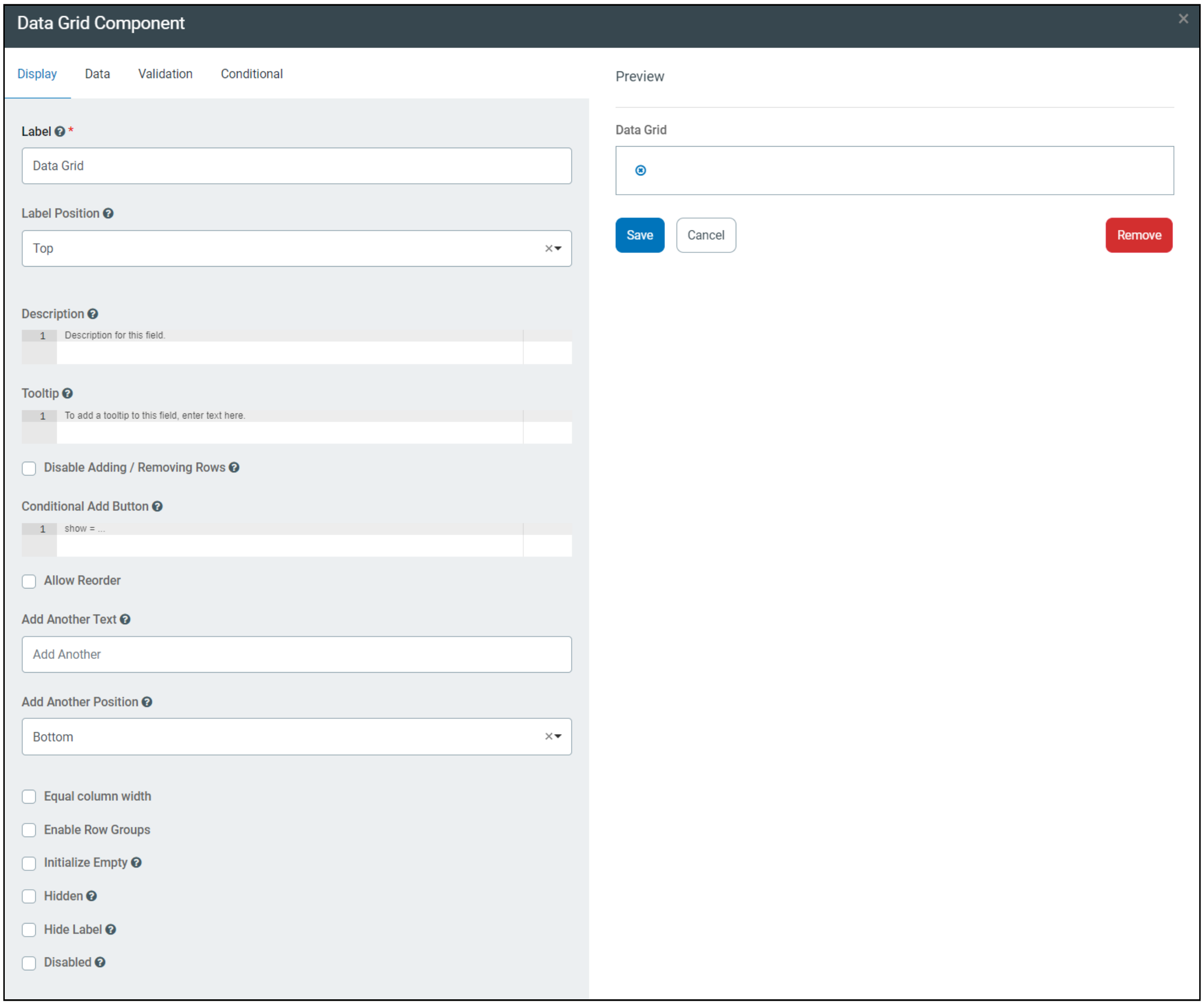
Container



Data Source


Data Source Component
Data
Trigger
Fetch
Conditional
Preview
Label *
Data Source
Clear Value When Hidden
Save
Cancel
Remove

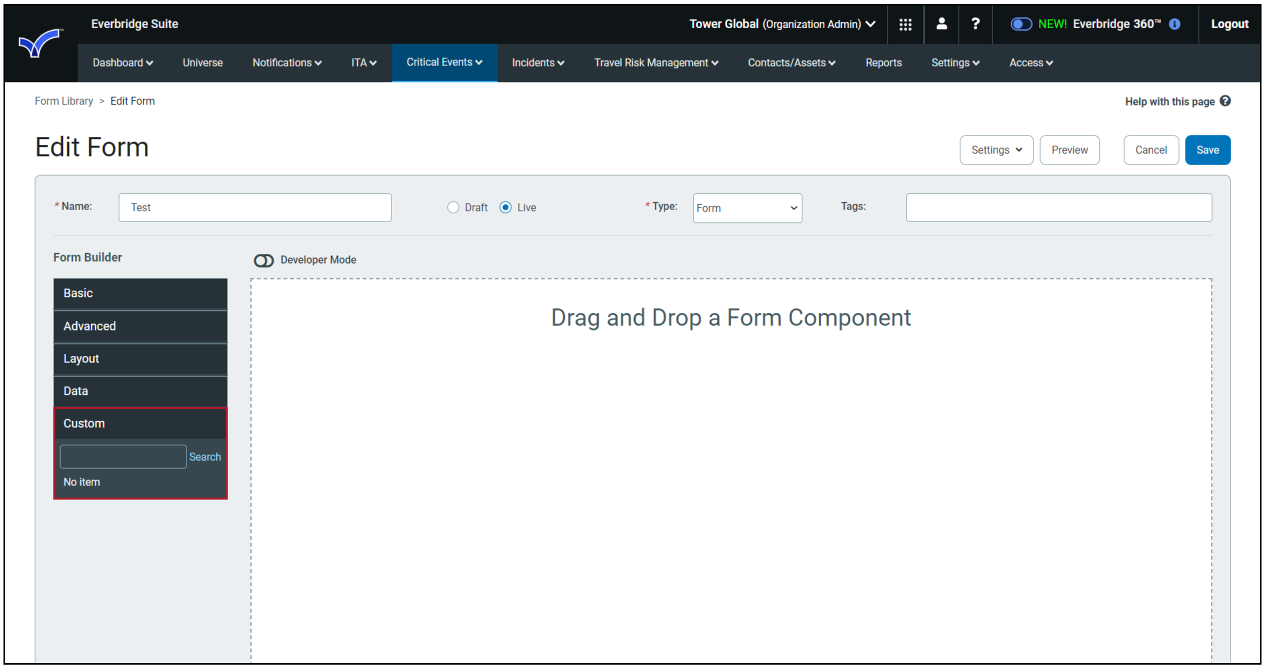
Data Grid



Custom

Custom components allow you to create a Form field with a custom JSON schema that can be rendered as anything within a front-end application. Using the Custom component, any kind of field can be created.

Once you have saved a component on the Form, select the component. Then, click the **Save** icon from the right-hand side.



From the **Save as Custom Component** dialog, give the custom component a name and click **OK**. The new custom component is listed in the Custom section of the Form Builder.

Managing Tasks in the Everbridge Mobile App

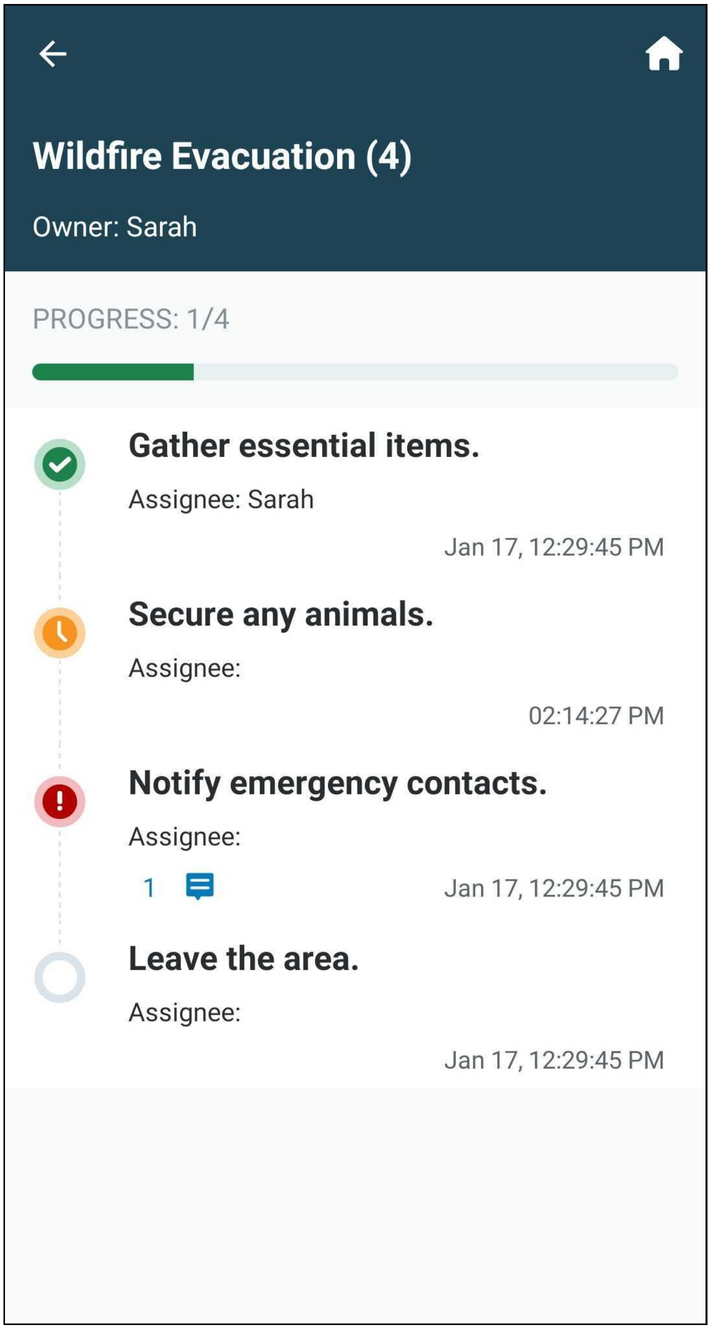
During a Critical Event, an authorized user of your Organization may launch an alert to responders that action is required to resolve the Event.

Receiving Task Assignments

When a Task List is launched for a Critical Event and a Task or Task List is assigned to you, a Notification will be delivered to your device via the Everbridge Mobile App.

To successfully respond to a Task List Notification:

1. Make sure you are logged into the **Everbridge Mobile App** with the record associated with your Organization.
2. Ensure you have allowed the app to deliver push alerts to your device. The push alert will be delivered from “Everbridge” and will advise a Task has been assigned.
3. For quick access to the Task List, open the app by tapping or selecting the alert that was delivered to your device; this will launch the Everbridge Mobile app and take you directly to the full Task List.



You can also open the app by tapping on the **app icon** from your home screen. If you do this, follow the red dots to get to the Task Lists:

- View the Notification in your Feed.
- Tap **Events**.
- Tap the Event record to view **My Tasks**

Any Task assigned to you will appear in the **My Tasks** tab of an Event.

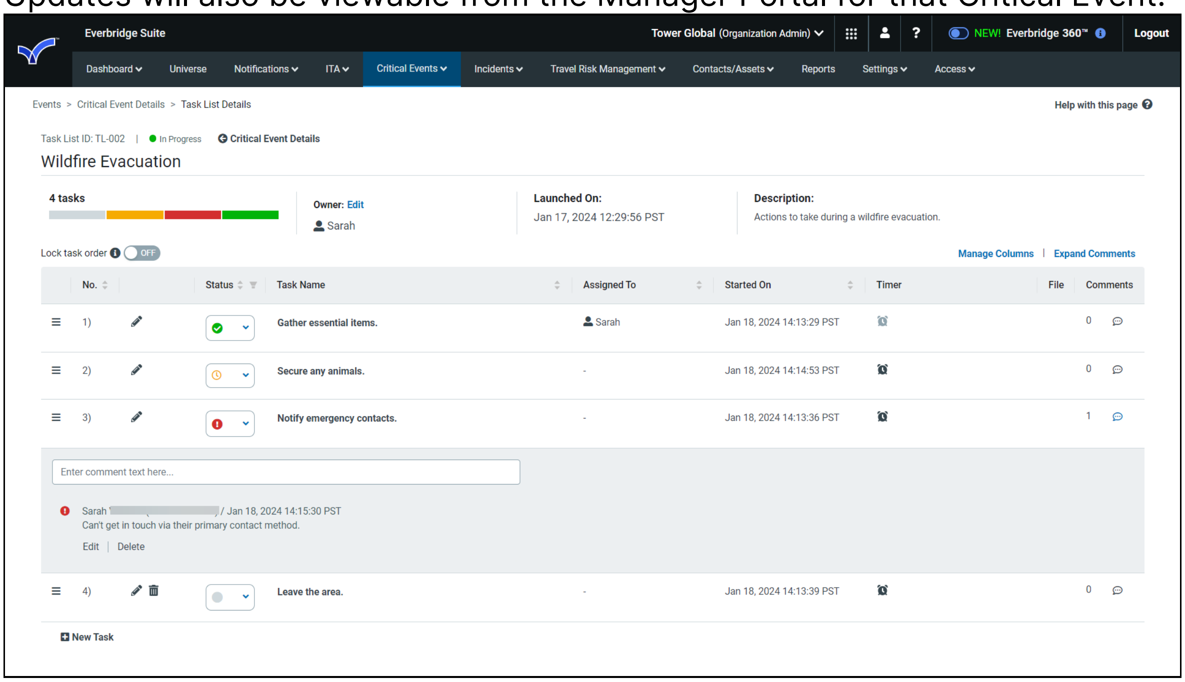
To manage My Tasks:

1. Tap the Event record in your feed to view your Tasks.
2. Select a Task from your list to view details.
3. Tap the name of the Task List to view all Tasks in the list, even if they are not assigned to you.
4. If more than one Task List is active they will all be listed here.

Managing a Task

You can modify the status of any Task assigned to you, as well as add comments. In addition, you can add up to four files to the Comments. To do this:

1. Tap an individual Task from My Tasks or from the complete Task List.
2. Tell your team you have started a Task by tapping **In Progress**.
3. Tap **Done** when a Task is complete. If attention is needed for a Task, tap **Needs Attention**. You will be required to add a comment when changing a Task to **Needs Attention**.
4. You can also add a text comment or image attachment to any Task.
5. A Task can also contain an attachment. Tap the attachment to download. If your device allows, you can view the document in the Everbridge Mobile App. You can see the status of all of your Tasks when you return to My Tasks.
6. Any update you make to a shared Task List will be reflected in your team's Tasks lists on their app.
7. Updates will also be viewable from the Manager Portal for that Critical Event.



NOTE: If configured, when a status change is made from a Mobile phone or the Member Portal, a real-time alert is shown in the Manager Portal.

Manage a Complete Task List

To manage a complete Task List:

1. Tap the name of the Task List from your **My Tasks** page. Here, you can see all the Tasks in a list, even if they are not assigned to you. When another assignee updates a status, you will see that update here.
2. View the details of a Task assigned to someone else by tapping the Task. You cannot modify the status of someone else's Task.
3. To add a text comment or an image to someone else's Task, tap **Add Comment**.

NOTE: You may not be the owner of every Task on a Task List. You can view and comment on Tasks assigned to others, but you cannot modify the status.

Incidents in Events

When a Critical Event is in progress, you may be notified of an Incident related to the Event. If the Everbridge Mobile App is a delivery method in that Incident Notification, you will see the Incident record listed in the Incidents tab of the Event.

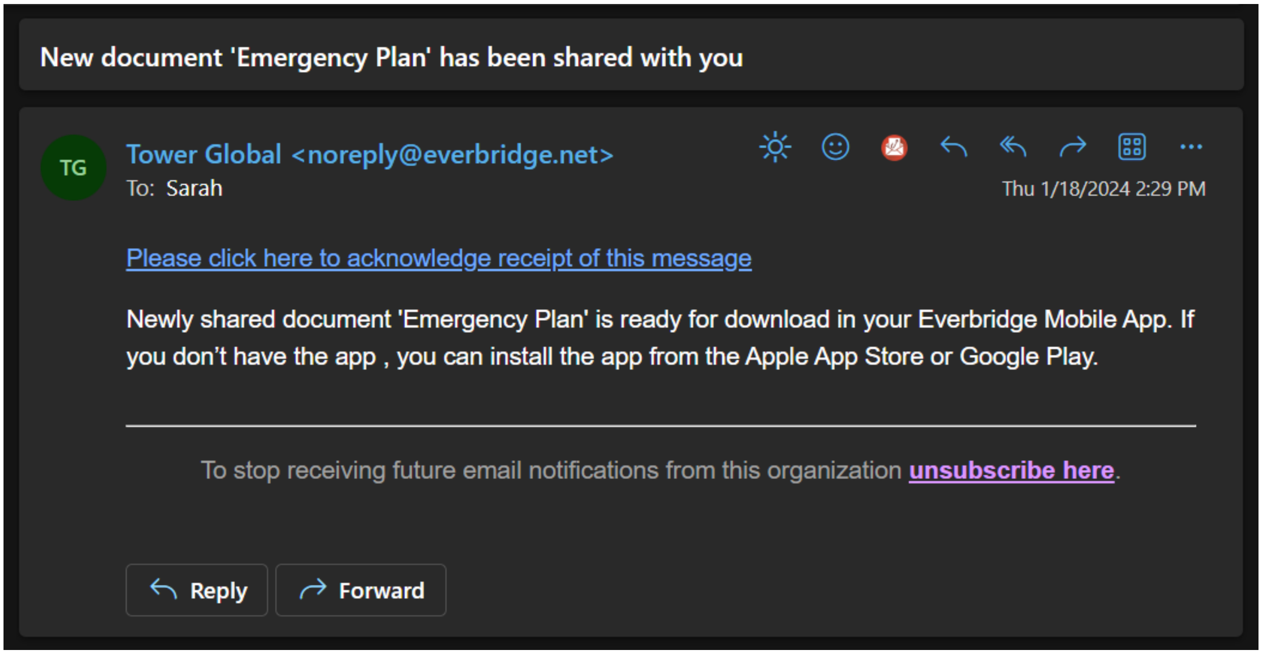
To manage Incidents in Events:

1. While viewing an Event, tap **Incidents** to view any Incidents associated with the Critical Event.
2. Tap an Incident record to view the details of that Incident. You will see:
   - The metadata about that Incident.
   - The Incident information from the Incident's variables.
   - All Notifications for that Incident.
   - Optionally, a button to join the Incident chat.
3. The Incident information, or variables, will be updated whenever the information for the field changes. The information for a field can change when an update Notification is issued for an Incident and contains new values for existing fields or new fields. Visit this page any time to see the most current information about the Incident.

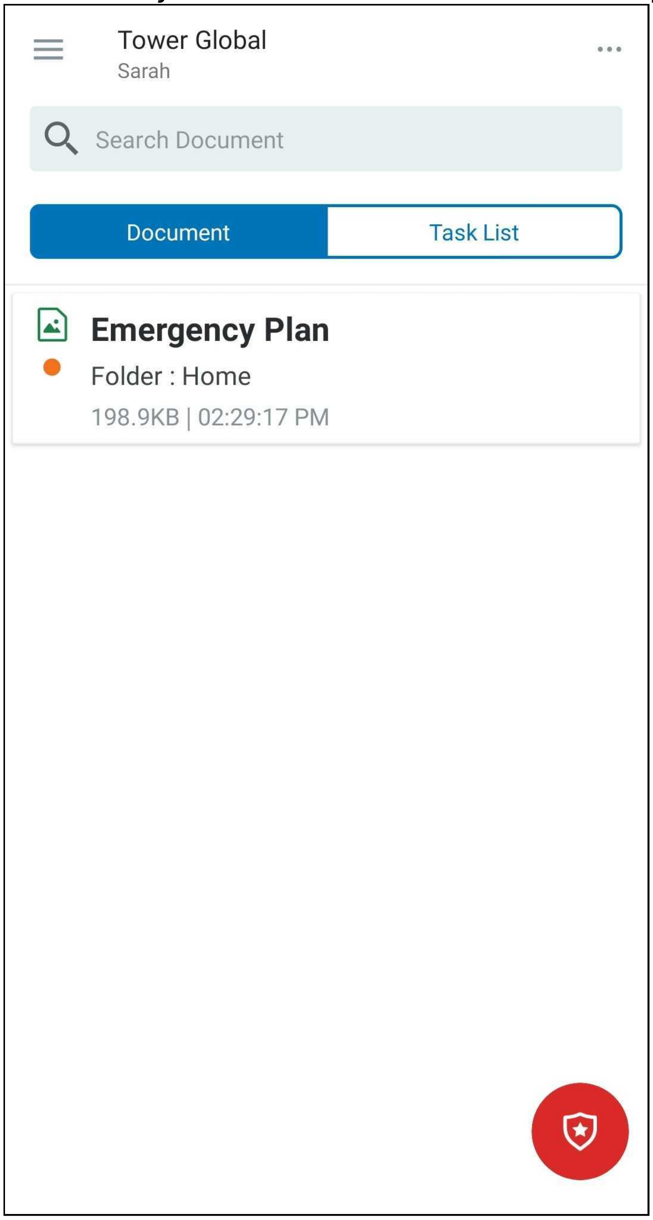
4. Tap a Notification to view the Notification details.
5. Tap **Go to secure chat** to join the chat for that Incident.

Mobile Offline Access to Documents

If your Task Lists or Documents are shared with Everbridge Mobile App users, they will be notified via email and push Notifications. See the procedure Share a Task List or Document with Mobile Contacts for more.



Everbridge Mobile App users will have a **Library** option added to their menu. This is where they can view shared Task List Templates and Documents.



- The list of files in the Library will include the name of the file, its size, and the date it was last downloaded to the device.
- The mobile user can delete files from local storage on their device. When a file is deleted, that file's record will remain in the list and will be identified as a file that has not yet been downloaded.
- A download button and dot indicate a newer version of a file is available for download.
- Users can choose to automatically download new and updated documents from **Settings** > **Everbridge Mobile App** > **Secure Messaging** > **Settings**.

- Once a file has been downloaded, it is stored as encrypted on the device so that it can be securely accessed even when the user does not have a network connection.
- A Document that is included in a Task List for a Critical Event can also be downloaded and securely stored in the mobile user’s library
- If a device has been lost, stolen, or compromised, the secure Document Library can be remotely wiped from the Organization in the Everbridge Manager Portal.

Critical Event Reports

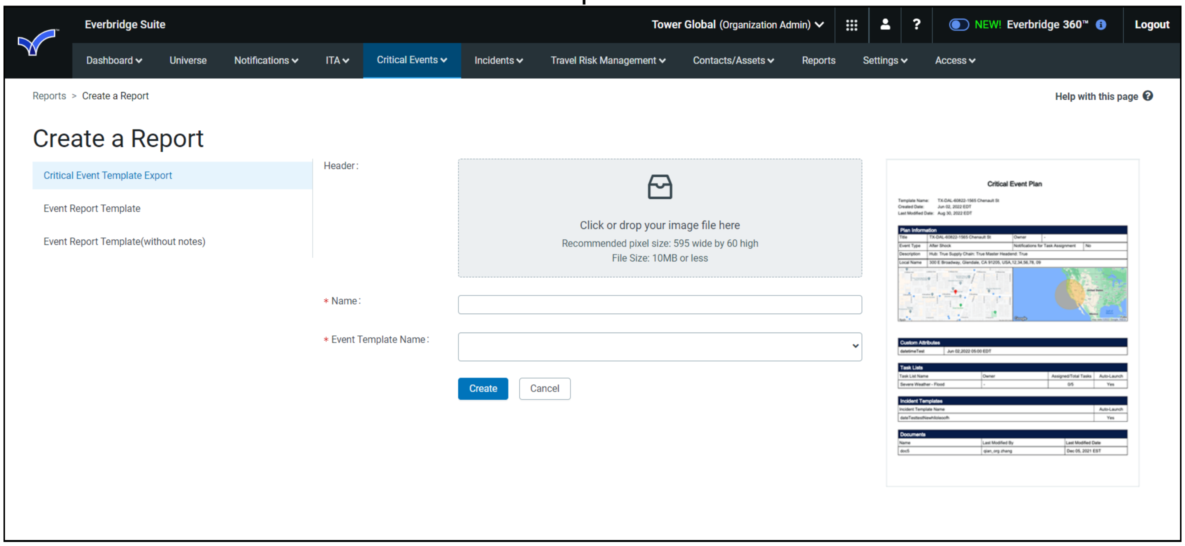
You can create and maintain custom Critical Event Reports from Event Templates.

Add Event Report

To add a Critical Event Report:

1. From the Critical Events Home page, select **Reports**. The Reports page appears.
2. Click **Add Report**.
3. Select the desired **Events Report Template** from the left-hand pane. An example of the report appears on the right-hand side of the window.
4. Set the basic information
    - Optionally, add an image in the Header. When you add a logo in **General Settings**, then you can overwrite it in the actual **Events Report Template** if needed. Otherwise, the logo from **General Settings** is used. If no logo is added in **General Settings**, you can upload one in the **Events Report Template** if needed.
    - Name your Report.
    - Set the conditions for the events:
        - **Event Status**—Active, Closed, or All (default)
        - **Event Type**—The event types are listed alphabetically. You can select more than one.
        - **Event Date**—Select a Start Date and End Date, no more than three months apart.
5. Click **Create**.
6. While your report is being generated, it is added to the **Reports** page with spinning circles. Click away from the **Reports** page, then click **Reports** again. When generated, your report is ready to be viewed online or downloaded.

7. Click the **Download** icon next to the report name to download its PDF.



Delete a report

To delete a Critical Event report:

1. From the **Reports** page, select the check box next to the report to be deleted.
2. From the **Actions** menu, select Delete.
3. Click **Delete Reports**.

Add Report Logo

To add a report logo:

1. From the **Settings** tab, select **Organization > Critical Event > General Settings**.
2. Drag and drop the **Report** logo. Acceptable file formats are jpg, png, or bmp, less than 10 MB in size, and 60 pixels or less in height.

When you add a logo in **General Settings**, then you can overwrite it in the actual Events Report Template if needed. Otherwise, the logo from **General Settings** is used. If no logo is added in **General Settings**, you can upload one in the **Events Report Template** if needed.