



# Asset Management Guide

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Everbridge Suite

September 2024

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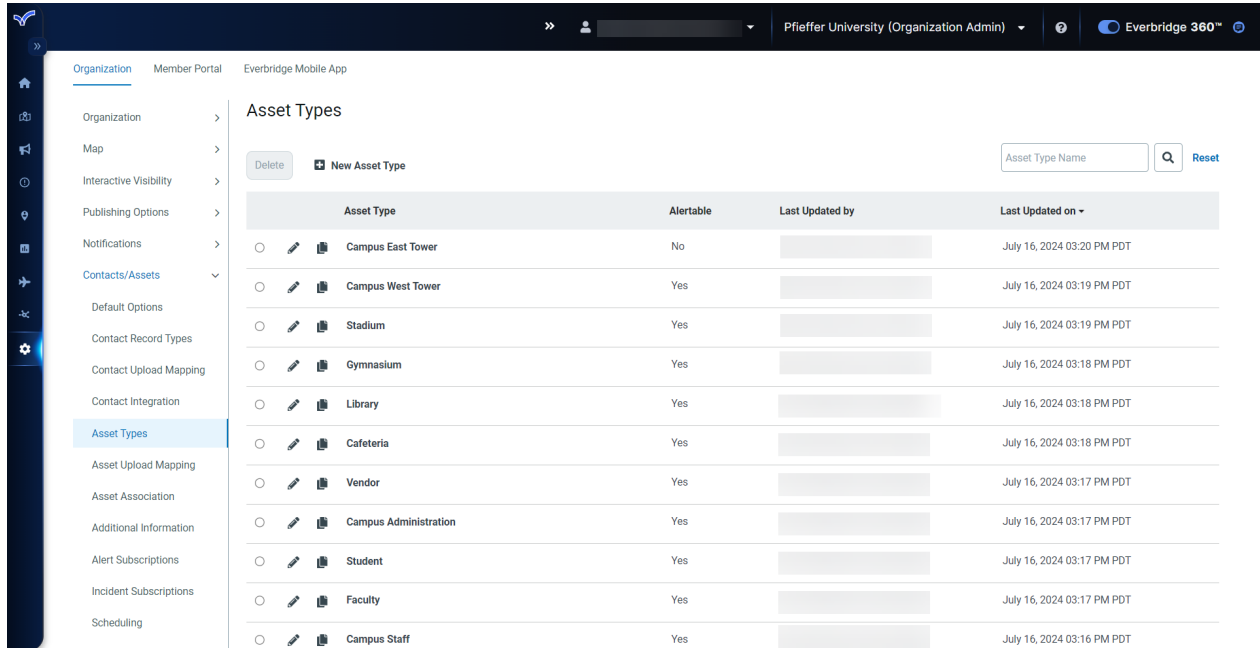
## What are Assets?

Assets are the physical or virtual entities that your Organization cares about other than contacts. If applicable, the **Contacts/Assets > Assets > Assets List** is where you can add and maintain Assets.

**NOTE:** If your Organization previously had Visual Command Center (VCC Assets) and/or Safety Connection (SC Buildings) and it has implemented Asset Management, your Assets are automatically migrated to the Manager Portal. After migration, going forward, you will manage Assets from the Manager Portal, Secure FTP, and the Asset Management REST APIs.

# Asset Types

You must define an Asset Type before adding Assets to it. Asset Types are managed from **Settings > Organization > Contacts/Assets > Asset Types**.



The following are the Asset templates:

- SC Building (Safety Connection Building, if applicable)
- Facility
- Person
- Mobile Unit
- Other

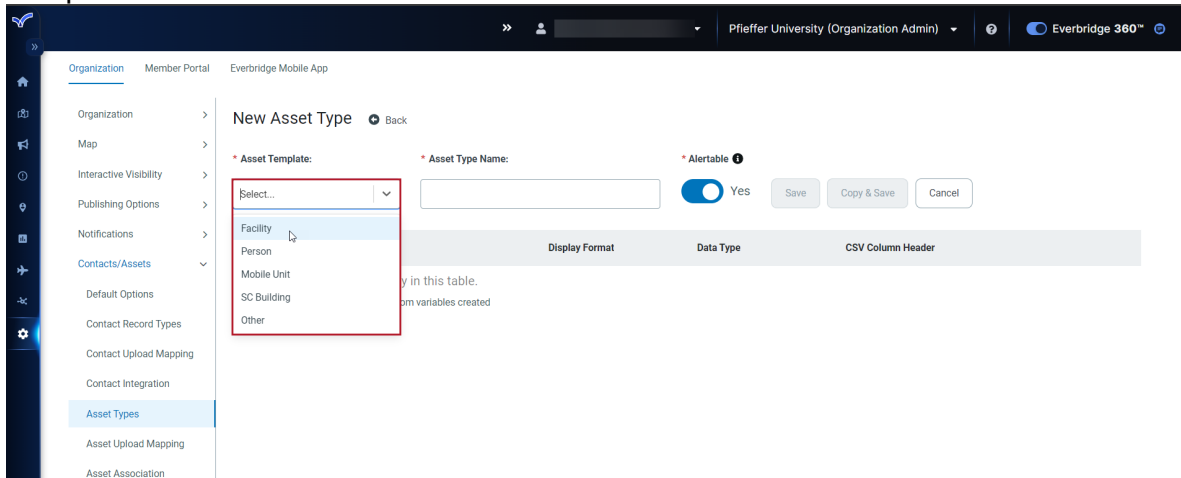
Standard attributes vary depending on the selected Asset template. These default attributes cannot be edited or removed.

## Add New Asset Type

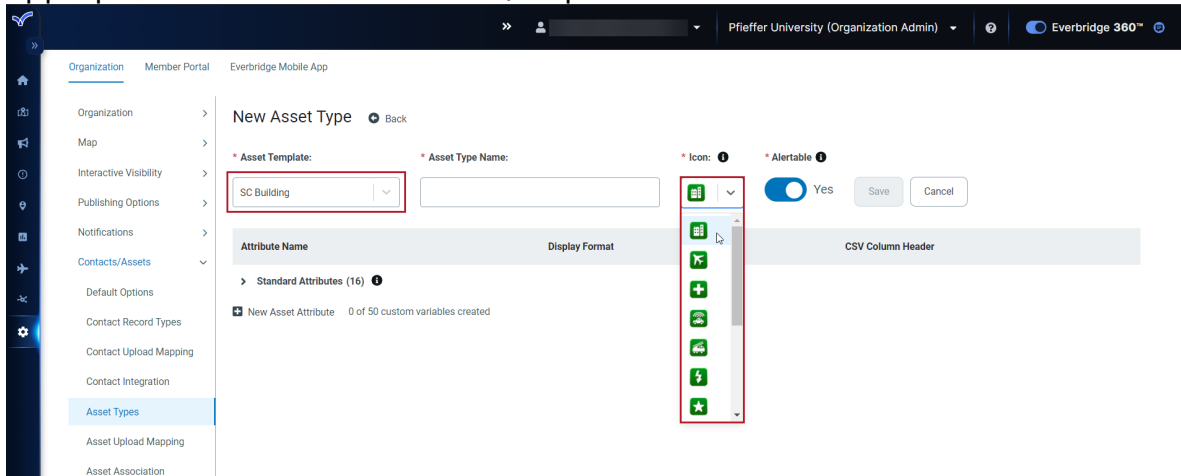
To add a new Asset Type:

1. From **Settings > Organization > Contacts/Assets**, select **Asset Type**.
2. Click **New Asset Type**.
3. Select the desired Asset Template from the drop-down list. Asset Templates are predefined templates with specific standard attributes based on the

template selected.



4. Give the Asset Type a name.
5. If the Safety Connection Building Asset type was selected, you can select an appropriate icon for the Universe/Map.



6. Toggle on **Alertable** if you want Visual Command Center to generate alerts when Assets of this type may be at risk.
7. Click **Save**.

**NOTE:** An Organization can only have **one** Asset Type for Safety Connection Buildings. This is because it can have contacts associated with it.

## Edit an Asset Type

To edit an Asset Type:

1. From the **Settings** tab, select **Organization > Contacts/Assets > Asset Type**.
2. Click the **Pencil** icon of the Asset Type you want to change. The **Edit Asset Type** dialog is displayed.

3. Make the desired changes, including creating custom attributes (see Create a Custom Asset Attribute).
4. Click **Save**.

## Create a Custom Asset Attribute

To create a Custom Asset Attribute:

1. Click **New Asset Attribute** to add a custom attribute. The number of custom attributes will vary depending on what has been provisioned for your Organization.

The screenshot shows a web interface with a list of asset attributes. A modal dialog titled "NEW ASSET ATTRIBUTE" is open in the center. The dialog has the following fields and controls:

- Attribute Name:** A text input field.
- Custom Header:** A text input field.
- Display Format:** A dropdown menu with "Select..." as the current selection.
- Data Type:** A dropdown menu with "Select..." as the current selection.
- Include help text:** An unchecked checkbox.
- Buttons:** "Cancel" and "Add" buttons at the bottom right.

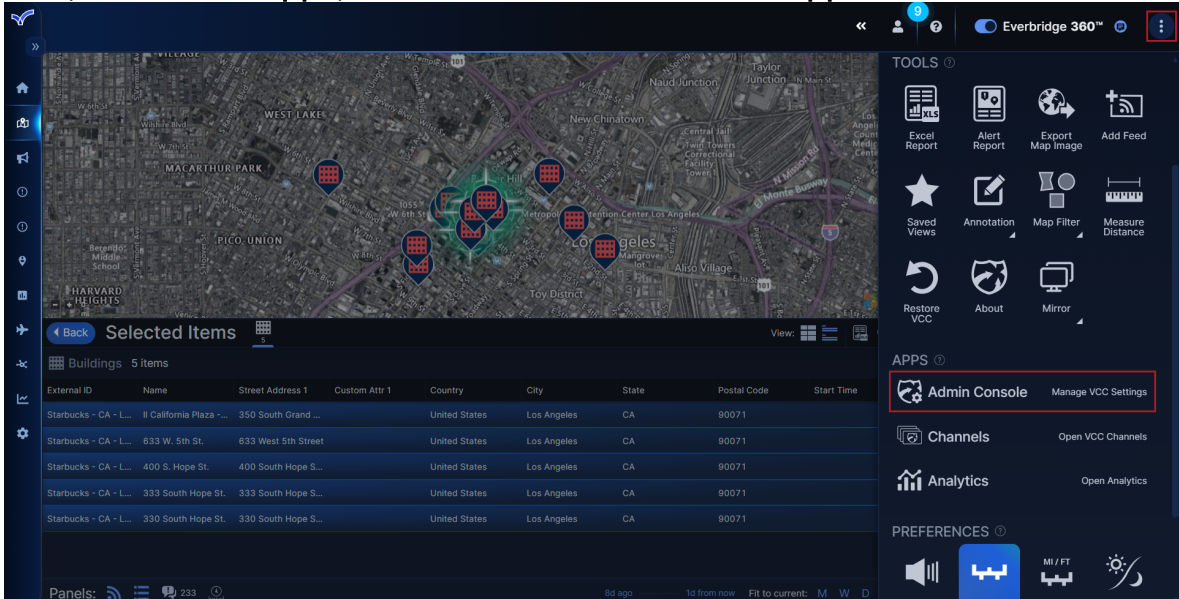
In the background, a table lists various asset attributes such as Category, Icon, Country, Street Address 1, City, State, Postal Code, Start Time, End Time, Geometry, Floor, and Room. At the bottom of the table, there is a button labeled "New Asset Attribute" and a status indicator "0 of 50 custom variables created". A red arrow points from this button to the "NEW ASSET ATTRIBUTE" dialog box.

2. Fill in the Attributes:
  - **Attribute Name**
  - **Custom Header**
  - **Display Format**
    - Textbox
    - Single Selection List
    - Multiple Selection List
  - **Data Type**
    - Text
    - Boolean
    - Whole Number
    - Decimal Number
    - Date
    - URL
  - **Include Help Text** - Select the checkbox to include Help Text, if needed. Then enter the Help Text in the field. Currently, the Help Text displays only on the **Edit Custom Attribute** dialog. Click **Add**.
3. Click **Save**.
4. Click the **Back** link to return to the list of Asset Types.

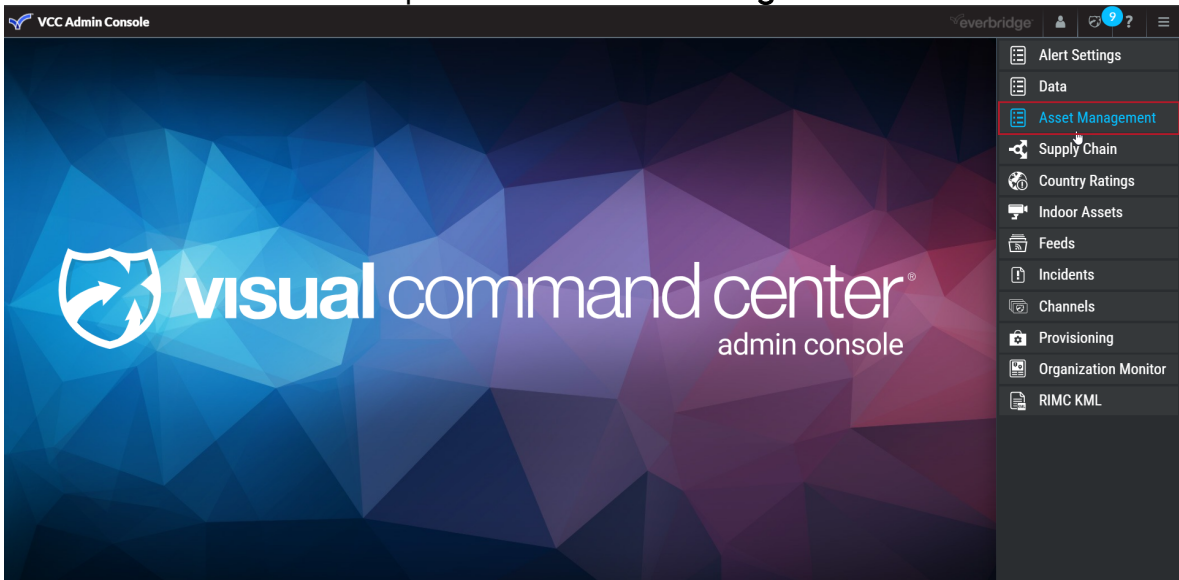
## Manage Data Settings

To manage data settings for an Asset Type:

1. From the Visual Command Center Operator Console, click the kebab menu icon, then under **Apps**, select **Admin Console** in the **Apps** subsection.



2. The VCC Admin Console opens. Click **Asset Management**.





- The **Asset Management** page opens. Choose an Asset Type from the list to the left, and then click **Manage Data Settings**.

The screenshot shows the 'Person: Contact' page in the everbridge VCC Admin Console. On the left, a sidebar lists asset types: 'Buildings' and 'Contact'. The 'Contact' asset type is selected and highlighted in green. The main area is titled 'Person: Contact' and contains a table of attributes. The 'Manage Data Settings' button is highlighted in red. The table below shows the configuration for various attributes.

Attribute	Type	Show On Card	Show On List	Show On Tooltip
+ External ID <small>Standard</small>	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
+ Name <small>Standard</small>	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
+ Notes <small>Standard</small>	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
+ First Name <small>Standard</small>	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
+ Middle Name <small>Standard</small>	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
+ Last Name <small>Standard</small>	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
+ Suffix <small>Standard</small>	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
+ Job Title <small>Standard</small>	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
+ Category <small>Standard</small>	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
+ Country <small>Standard</small>	Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- The **Edit Asset Type** page for the selected Asset opens in the Manager Portal.

The following actions can be taken from this page:

- Edit Asset Type Name
- Set as Alertable (Yes/No)
- Edit CSV Column Headers for individual Attributes
- Add or edit custom Asset Attributes
  - NOTE: Standard Attributes are inherited from the Asset Template and cannot be edited or removed.

5. Click **Save** once the desired changes have been made.

## View an Asset Type and Its Attributes

To view an Asset Type and its attributes:

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

2. Click the name of the Asset Type to view details.
3. Click **Standard Attributes** to view the attribute name, display format, and data type.
4. Click the Back button to return to the list of Asset Types.

## Delete Custom Attributes

You can delete a custom attribute that is not being used by an Asset. However, if at least one Asset has the value populated for the Custom Attribute, you are not allowed to delete it. Instead, you see the **Custom Attribute Cannot Be Deleted** dialog, where the body of the message explains “Custom attribute cannot be deleted as one or more Assets are using this.”

1. Select the Trash Bin of the Custom Attribute to be deleted.
2. Click **Confirm**.

## Adding Assets to Your Everbridge Suite Organization

Once the configuration options are completed, you can begin adding Assets to the Everbridge. Assets can be added individually or through an upload process.

You can also edit and delete Assets individually or through an upload process.

### Adding Individual Assets

To add a new Asset:

1. Navigate to **Contacts/Assets > Assets > New Asset**.
2. The **New Asset** dialog is displayed. Fill in the fields. Required fields are indicated with a red asterisk (\*).

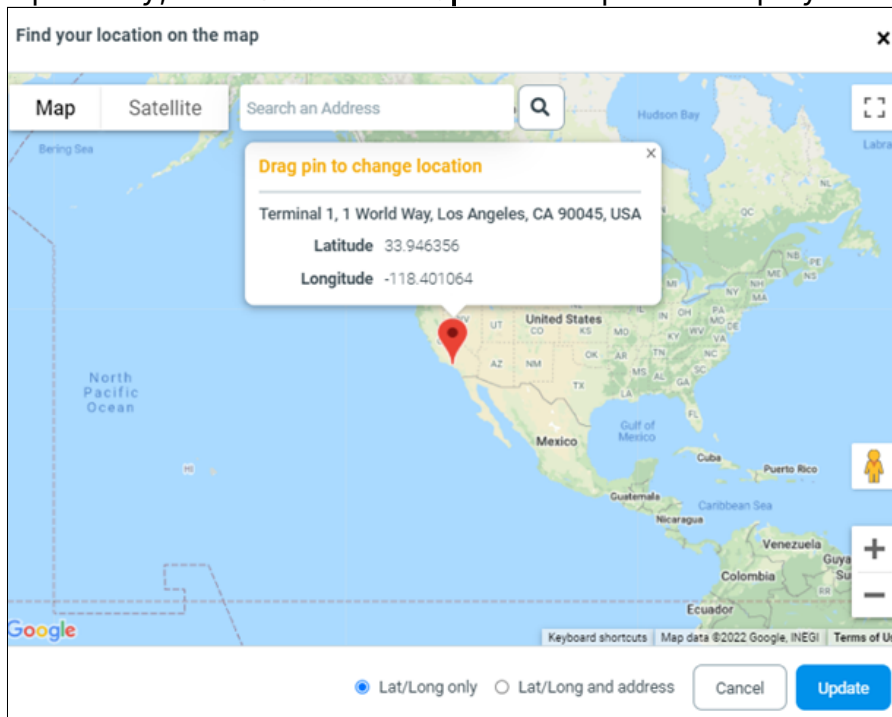
3. Enter the Asset's address information.
4. Add a Geometry Boundary or Coordinates if applicable.
5. If this Asset is associated with specific individuals or groups, configure them by clicking **Add Association**. See [Asset Associations](#) for more details.

6. Fill in any desired information in the Additional Attributes section. For example, for greater granularity, you can specify individual floors and rooms when adding a Building Asset.
7. Click **Save**.

### View or update an Address Location

To view or update an address location:

1. Click the **Pencil** icon of the desired Asset.
2. As needed, update the Address.
3. Select the **Geometry Coordinates** radio button.
  - **Geometry Boundary** will not be displayed/visualized on Everbridge Suite's Universe/Map components. Geometry Boundary will be displayed in Visual Command Center (if applicable) for visualization and alerting purposes. When drawing a circular boundary from the Select Shapes dialog, the radius, and miles are displayed when you draw or select the circle.
4. Select the Suggested Address. When the suggested address is selected, the Lat/Long are repopulated.
5. Optionally, click **Select on map**. The Map View displays the location.



6. If you move the pin, using the radio button options, you can select whether you want the Lat/Long updated only or both the Lat/Long and address updated.
7. Click **Update**.
8. Click **Save** after editing the Asset.

## Uploading Assets

### Backing Up Your Assets File by Asset Type

Before uploading an Assets file using either the web-based interface or via SFTP, Everbridge recommends making a backup of your current files. Follow the procedure below.

To make a backup of your current Assets file:

1. From **Contacts/Assets > Assets**, select the desired Asset Type from the drop-down list. A list of Assets is displayed by the selected Asset Type.
2. Click **Download** to generate a CSV file of all Assets per selected Asset Type.
  - In the event that you need to revert to this data file, note that you have it available on your desktop.
4. Repeat Steps 1 through 3 for each Asset Type that you want to backup.

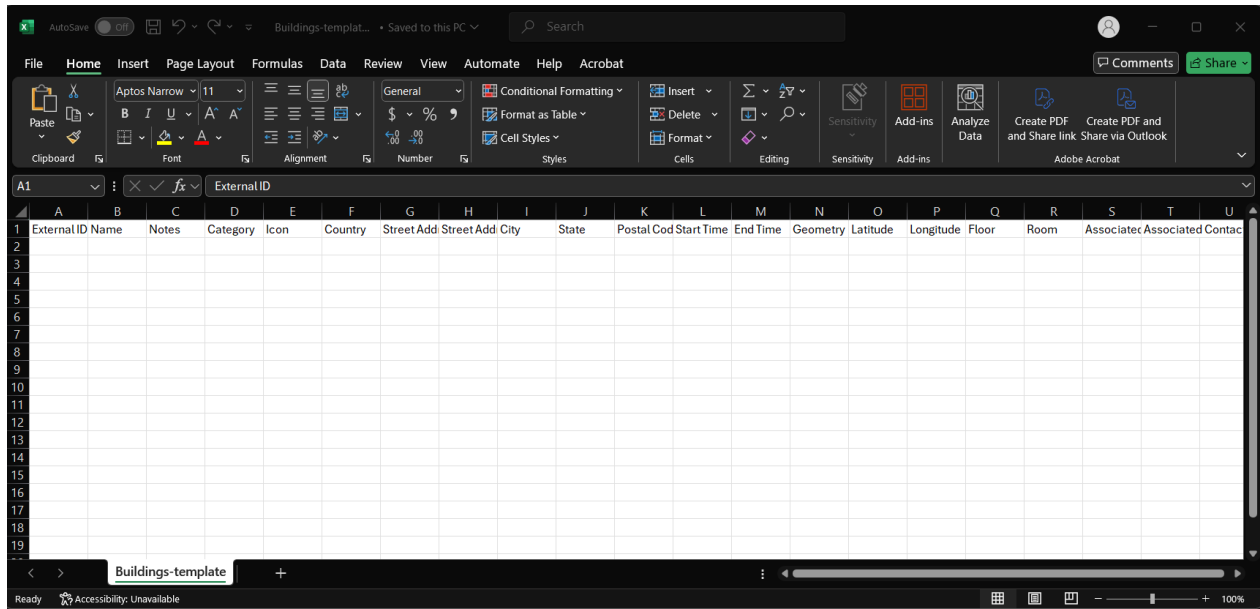
### Preparing Your Assets CSV File for Upload

Assets are uploaded via a CSV file. You can download the specific Asset template by clicking **Download Template** from **Contacts/Assets > Upload Assets**.

File Name	Asset Type	Upload Date	Uploaded By	File Status	Source	Records Received	Records Loaded	Upload Option
Buildings-templ...	Buildings	August 29, 2024 0...		COMPLETE	WEB	1	0	UPDATE
Buildings-templ...	Buildings	August 29, 2024 0...		COMPLETE	WEB	0	0	UPDATE
Buildings-templ...	Buildings	July 30, 2024 03:5...		COMPLETE	WEB	0	0	UPDATE

The specific template contains the required column headers for your file. The following is an example of the Building-template.csv file.






## Standard Attributes of the Asset Template

The following table provides details about the column headings, from left to right, in the Asset template for the CSV file. The column headings must not be changed. If you use your own spreadsheet, then ensure your column headings use the exact case-sensitive spelling and spaces.

Standard attributes vary depending on the selected Asset Type. These default attributes cannot be edited or removed.

Field	Required	Comments
External ID	Yes	Client-defined unique identifier for the Asset record. Maximum Length: 200 Data Type: String Cell cannot be empty Value must be unique in file <b>NOTE:</b> If two records have the same External ID, only the latest record is inserted in the Asset list.
Name	Yes	Client-defined unique identifier for the Asset. Minimum Length: 1, Maximum Length: 200

		Data Type: String Cell cannot be empty
Notes	No	Maximum Length: 2,000 Data Type: String
Category	No	Minimum Length: 1, Maximum Length: 200 Data Type: String
Icon	Yes 	<p><b>NOTE:</b> If you do not enter an icon number, or you enter an invalid value, Icon 1, Office, is used.</p> <p>The following types of Safety Connection assets, from top to bottom, correspond with the icons to the left:</p> <ul style="list-style-type: none"> <li>1Office</li> <li>2Airport</li> <li>3Hospital</li> <li>4Police/Sheriff Station</li> <li>5Fire Station</li> <li>6Power Plant</li> <li>7Your location of Interest (generic)</li> <li>8Bank</li> <li>9Data Center</li> <li>10Manufacturing Plant</li> <li>11Prison/Jail</li> <li>12Retail Store/Restaurant</li> <li>13Meeting Room</li> </ul> <p><b>NOTE:</b> These icons are valid only for the Safety Connection Asset Type. Currently, Visual Command Center icons are managed in the Visual Command Center Admin Console.</p>



Country	No NOTE: You can provide either a full address and the latitude/longitude is automatically geo-coded, or you can provide the latitude/longitude.	ISO Alpha-2 country code, ISO Alpha-3 country code, full name (The country code is then converted to Alpha-2 for storage.) Data Type: String Country name is in the ISO country list For Latitude/Longitude, only Decimal Degrees (DD) are supported
Street Address 1	No NOTE: You can provide either a full address and the latitude/longitude is automatically geo-coded, or you can provide the latitude/longitude.	Maximum Length: 200 Data Type: String
Street Address 2	No NOTE: You can provide either a full address and the latitude/longitude is automatically geocoded, or you can provide the latitude/longitude.	Maximum Length: 200 Data Type: String
City	No	City name Maximum Length: 100 Data Type: String For US addresses, jurisdiction name below county level
State	No	Administrative level below county level Maximum Length: 100 Data Type: String

		For US addresses, Everbridge recommends full State name, e.g., "California"
Postal Code	No	Maximum Length: 20
Start Time	No	Select the date and change the time from the Calendar icon.
End Time	No	Select the date and change the time from the Calendar icon.
Geometry	No NOTE: If Geometry has a value, then it will be used as the Asset Geometry. Otherwise, Latitude/Longitude is used.	Expected format is GeoJSON or WKT in uploads.
Latitude	No	Expected Latitude value is a number Data Type: String Not validated for client jurisdiction Only Decimal Degrees (DD) are supported Minimum Value: -90.0000000000 Maximum Value: 90.0000000000
Longitude	No	Expected Longitude value, including negative sign, is a number Data Type: String Not validated for client jurisdiction Only Decimal Degrees are supported Minimum Value: -180.0000000000 Maximum Value: 180.0000000000

Floor	No	For Safety Connection Asset Type only Floor number Maximum Length: 20 Data Type: String
Room	No	For Safety Connection Asset type only Room number Maximum Length: 20 Data Type: String

The following is an example CSV file downloaded from **Contacts/Assets > Upload Assets > Download Template** from a selected Asset Type.

	A	B	C	D	E	F	G	H	I	J	K	L	M	
	External ID	Name	Notes	Category	Icon	Country	Street Address 1	Street Address 2	City	State	Postal Code	Start Time	End Time	Geometry
1	LAX					2 US	1 World Way		Los Angeles	California	90045			["coordinates":[-118.397610
2	22	Location22				1 GB	12 Richmond Road	apt22	Claverton Down	Bath	BA1 5TU			["coordinates":[-2.363298,5
3	19	Location19				1 GB	4 Richmond Road	apt19	Claverton Down	Bath	BA1 5TU			["coordinates":[-2.363298,5
4	UnionBank	Glendale Union Bank				8 US	330 N Brand Blvd		160 Glendale	CA	91203			["coordinates":[-118.25459,5
5	29	Location29				1 US	1132 Bishop Street		1600 Honolulu	HI	96813			["coordinates":[-157.860412
6	7	Location7				1 GB	28 Bathwick Hill	apt7	Claverton Down	Bath	BA2 6LB			["coordinates":[-2.344032,5
7	Hospital3	USC Verdugo Hills Hospital				3 US	1812 Verdugo Blvd		Glendale	CA	91208			["coordinates":[-118.216136
8	14	Location14				1 GB	Claverton Down Gospel Hall Claverton Down Road	apt14	Claverton Down	Bath	BA2 6DZ			["coordinates":[-2.331078,5
9	28	Location28				1 US	4114 Sepulveda Blvd	apt29	Culver City	CA	90230			["coordinates":[-118.412483
10	Restaurant02	Porto's Bakery				12 US	315 N Brand Blvd		Glendale	CA	91203			["coordinates":[-118.25547,5
11	Jail2	Burbank PD Jail				11 US	200 N 3rd St		Burbank	CA	91502			["coordinates":[-118.308596
12	10	Location10				1 GB	Cedar Lodge Bathwick Hill	apt10	Claverton Down	Bath	BA2 6EX			["coordinates":[-2.335251,5
13	5	Location5				1 GB	13 Bathwick Hill	apt5	Claverton Down	Bath	BA2 6EW			["coordinates":[-2.343684,5
14	6	Location6				1 GB	27 Bathwick Hill	apt6	Claverton Down	Bath	BA2 6LA			["coordinates":[-2.341571,5
15	8	Location8				1 GB	2 Bathwick Terrace Bathwick Hill	apt8	Claverton Down	Bath	BA2 4EL			["coordinates":[-2.349741,5
16	3	Location3				1 GB	5 Bathwick Hill	apt3	Claverton Down	Bath	BA2 6EP			["coordinates":[-2.346208,5
17	26	Location26				1 GB	23 Bathwick Hill	apt26	Claverton Down	Bath	BA2 6EW			["coordinates":[-2.343684,5
18	BUR	Bob Hope Airport				2 US	2627 N Hollywood Way		Burbank	CA	91505			["coordinates":[-118.349043
19	27	Location27				1 GB	7 Chaucer Road	apt27	Claverton Down	Bath	BA2 4QU			["coordinates":[-2.363403,5
20	Jail1	Glendale City Jail				11 US	131 N Isabel St		Glendale	CA	91206			["coordinates":[-118.24919,5
21	24	Location24				1 GB	21 Bathwick Hill	apt24	Claverton Down	Bath	BA2 6EW			["coordinates":[-2.343684,5
22	20	Location20				1 GB	8 Richmond Road	apt20	Claverton Down	Bath	BA1 5TU			["coordinates":[-2.363298,5
23	13	Location13				1 GB	Foxdale North Road	apt13	Claverton Down	Bath	BA2 6HY			["coordinates":[-2.337138,5
24	21	Location21				1 GB	9 Richmond Road	apt21	Claverton Down	Bath	BA1 5TU			["coordinates":[-2.363298,5
25	4	Location4				1 GB	26 Chaucer Road	apt4	Claverton Down	Bath	BA2 4QX			["coordinates":[-2.363254,5
26	Fire21	Glendale Fire Station 21				5 US	421 Oak St		Glendale	CA	91204			["coordinates":[-118.26189,5
27	11	Location11				1 GB	Combe Royal Cottage Bathwick Hill	apt11	Claverton Down	Bath	BA2 6EQ			["coordinates":[-2.333333,5
28	2	Location2				1 US	100 Marmot Drive 1	apt2	Red Feather Lake	CO	80545			["coordinates":[-105.589814
29	17	Location17				1 GB	22 Chaucer Road	apt17	Claverton Down	Bath	BA2 4QX			["coordinates":[-2.363254,5
30	1	Location1				1 CN	Street1	apt1	Beijing	Chaoyang	100010			["coordinates":[-116.373946,
31	9	Location9				1 GB	Casa Bianca Bathwick Hill	apt9	Claverton Down	Bath	BA2 6LA			["coordinates":[-2.341571,5
32	16	Location16				1 GB	11 Chaucer Road	apt16	Claverton Down	Bath	BA2 4QU			["coordinates":[-2.363403,5
33	Police1	Glendale Police Department				4 US	131 N Isabel St		Glendale	CA	91206			["coordinates":[-118.24919,5
34	25	Location25				1 GB	22 Bathwick Hill	apt25	Claverton Down	Bath	BA2 6EW			["coordinates":[-2.343684,5

## Uploading Your Assets CSV File

After you have prepared your CSV file using the corresponding download template from your selected Asset Type, you can upload it. You can upload or delete Assets using the following procedure.

To upload your assets using the web-based interface:

1. From **Contacts+Assets > Assets > Upload Assets** page, select the **Upload** button.
2. The **Uploads Assets** dialog is displayed. Select the desired Asset Type from the drop-down list.

**Upload Assets**
✕

---

**\* Asset Type:**

Select Asset Type...

Contact  
 Buildings

- Compressed (.zip) file cannot contain folders or multiple other files.
- File size limit is 100 MB.

Cancel

Upload

3. Click **Select a File**.
4. From the **Open** dialog, select the desired Assets file and click **Open**.
  - Acceptable files are .csv, tar.gz, or compressed (.zip) .csv file.
  - The compressed (.zip) file cannot contain folders or multiple other files.
  - Otherwise, the **Invalid File Type** message appears in the Upload Assets dialog.
5. Select an option:
  - **Update** - Insert new, update matching. Nothing is deleted.
  - **Replace** - Within matching Asset Type only. Insert new. Updating matching. Delete all that do not have a match.

- **Delete** - Delete all matching Assets.

**Upload Assets**
✕

---

**\* Asset Type:**  
Buildings

✓
Buildings-template.csv
🗑️

**Select an option** [Upload Options Help](#)

---

**Update**  
Insert new. Update matching. Nothing is deleted.

**Replace**  
Within matching Asset Type only:  
Insert new. Update matching. **Delete** all that don't have a match.

**Delete**  
**Delete** all matching assets.


Cancel
Upload


6. Click **Upload**. You'll receive two automated emails:

- One that the data file was received.

Everbridge Notification - Asset Data File (Received) # 66d0e597029845420ee7bbe8

---


Tower Global <noreply@everbridge.net>



To:  Thu 8/29/2024 2:18 PM

Dear Sarah,

We received an Asset data file for your organization. Refer the details below.

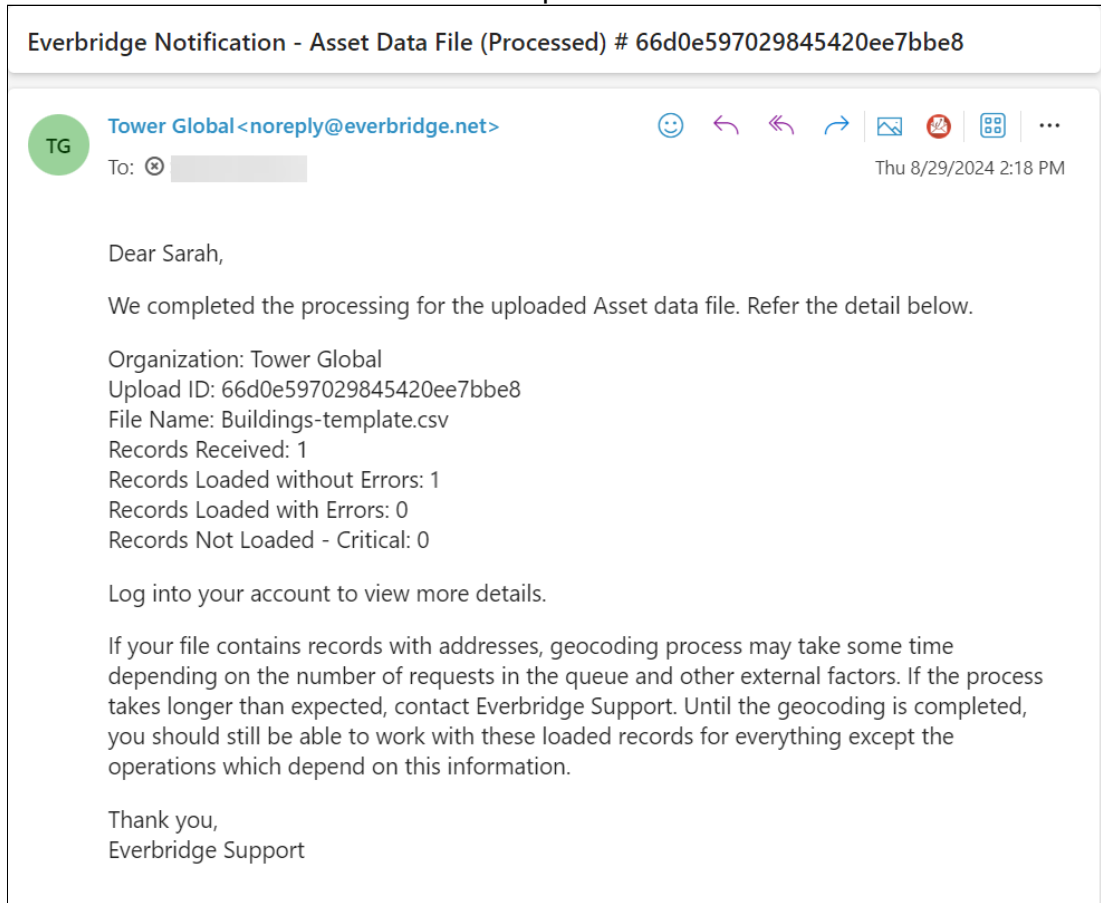
Organization: Tower Global  
 Upload ID: 66d0e597029845420ee7bbe8  
 File Name: Buildings-template.csv  
 File Size: 361  
 Request Type: UPDATE  
 Uploaded By:   
 Uploaded On: 2024-08-29 21:18:15 UTC  
 Uploaded Via: WEB

We will send another update once the processing is completed.

If you have any question about this file, contact your organization user who submitted this request. If this upload was done in error or not authorized, contact Everbridge Support immediately.

Thank you,  
 Everbridge Support

- Another that the data file has been processed.



7. Click **Refresh**, then look at the **Records Received** and **Records Loaded** columns.
8. Select the desired CSV file name.
  - **Loaded without error** - Records loaded normally.
  - **Loaded with error** - Records where non-required field(s) had something incorrect, but there was enough good information to load them anyway. If needed, return to the CSV file and fix the issues before uploading again.
  - **Not loaded - critical error** - Records that had errors so severe that they were not loaded. Return to the CSV file and fix the issues before uploading again.
9. If your **CSV loaded with error(s)**, select the corresponding tab and read the error message(s). Click **Download** to generate a list of Asset records that were loaded with errors for troubleshooting purposes. If needed, return to the Asset CSV file and fix the issues before uploading again.
10. If your **CSV was not loaded - critical error(s)**, select the corresponding tab and read the error message. These are records that have errors so severe that they were not loaded. Click **Download** to generate a list of Asset records that were not loaded - critical error for troubleshooting purposes. Return to the Asset CSV file and fix the issues before uploading again.

## Uploading an Assets Data File Via Secure FTP

With the Asset Secure FTP (File Transfer Protocol) upload, the Asset Type name is inferred from the filename (to know which Asset Type to which this upload belongs). The filename should start with the Asset Type name, followed by the suffix directly, or followed by the triple underscore with anything additional. For example, if “Airport” is the Asset Type name, Everbridge supports:

- Airport.csv
- Airport\_\_\_.csv
- Airport\_\_\_1.csv

By configuring your computer and Secure FTP software to work together, you can programmatically submit the CSV file containing your Asset records. The computer system needs to add the data file in the location configured in the Secure FTP software. The Secure FTP software is scripted to perform the transfer.

### To submit an Assets data file via Secure FTP:

1. First, make a backup of your current Assets data file.
2. From the **Settings** tab at the Organization level, select **Contacts / Assets > Upload Options** (or, from the **Settings** tab at the Account level, select **Security > Secure FTP**), and configure your system to add an Assets file in the Everbridge format. See the [Organization Administrator Guide](#) or the [Account Administrator Guide](#) for more details.
3. You then script or schedule software that supports Secure File Transfer Protocol (FTP) to upload your file to Everbridge. With your IT department, perform the steps in the procedure To use Secure FTP to upload CSV data files.

- **NOTE:** Download the Access Instructions to prepare and test your connection to the Everbridge Secure FTP Server as well as to encrypt your Contact data at the file level using PGP or GPG in addition to the standard encryption in transit (SSL or TLS) provided by Everbridge.

The Access Instructions are intended to guide you in exploring and testing the Everbridge Secure FTP connectivity. They do not provide instructions for developers since Everbridge does not know which tool your organization uses to develop your FTP client. Contact your IT department regarding third-party tools and/or any source code for interfacing with an FTP server.

4. Prepare your data file. (See [Preparing Your Assets CSV File for Upload](#).)
5. Ask your IT department to configure your computer system and Secure FTP software.



6. The Secure FTP software is scripted to perform the transfer. On the server, from the directory “cem\_asset”, use the following subfolders as destinations for your asset data file:
  - **Update** - equivalent of the UPDATE option on the Uploads page
  - **Delete** - equivalent of the DELETE option on the Uploads page
  - **Replace** - equivalent of the REPLACE option on the Uploads page
7. When the data file is transferred:
  - For Assets - from **Contacts/Assets > Assets**, perform Steps 5-7 of the procedure [Uploading Your Assets CSV File](#).

## Upload Options

There are several ways to add contacts to Everbridge Suite from **Organization Settings > Contacts and Groups (or Contacts/Assets) > Upload Options**:

- Fill in a form for a single contact and save it to the database.
- Use a data file containing many contacts and upload it to the database.
- Configure another system to automatically add a file containing a number of contacts and upload it to the Everbridge database.

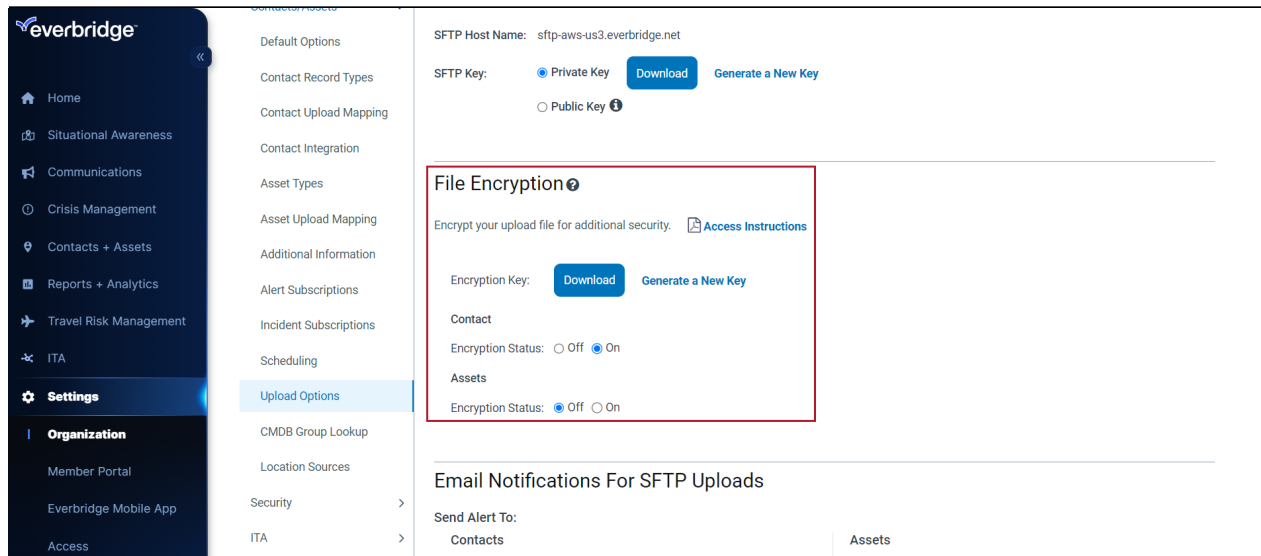
## Secure FTP

Most Organizations use bulk upload methods to add and manage many contacts at once. One way to automate the upload is through the Everbridge Manager Portal. You configure your system to add a contact upload file in the Everbridge format. You then script or schedule software that supports **Secure File Transfer Protocol (SFTP)** to upload your file to Everbridge.

Using an automated system saves time and helps to prevent errors. You can use the Secure FTP software to manually upload files. This allows you to test your connection to Everbridge and make sure that your system is configured properly. If you are going to upload files manually, there is no advantage to using Secure FTP software instead of uploading through the Manager Portal.

## File Encryption

**File Encryption** provides a standard encryption method (such as PGP) to generate encryption keys. The same encryption key can be used for both Contact and Asset uploads. The encryptions can be utilized together, separately, or not at all.



By configuring your computer system and Secure FTP software to work together, they can automatically add and install contact data updates. The computer system needs to add and place the data file in the location configured in the Secure FTP software. The Secure FTP software is scripted to perform the transfer.

FTP instructions are not provided in this document. If you have questions about using FTP, contact your IT department or your Client Services representative.

**NOTE:** Only .pgp files are supported for Asset Data.

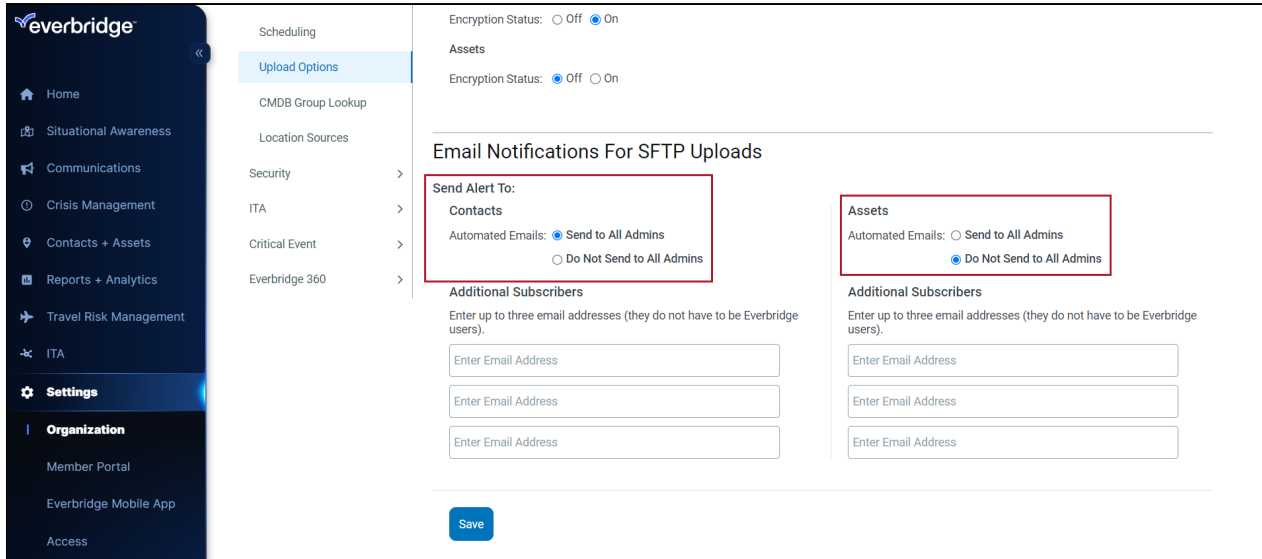
### To use File Encryption for additional security:

1. From the **Organization** tab, select **Contacts and Groups** or **Contacts/Assets** > **Upload Options**.
2. From the **File Encryption** pane, set the **Encryption Status** radio button to **On**.
3. Click **Download Access Instructions**.
4. Save the file to your desktop.
5. Follow the instructions from the downloaded file.

**NOTE:** If encryption is turned on in the Secure FTP settings and you want to upload a file that is not encrypted, you need to turn off encryption in the settings, then upload the file, and turn encryption back on.

## Email Notifications for SFTP Uploads

Organization Administrators can configure which email addresses are subscribed to receive notifications when a new SFTP is complete. You can select **Send to All Admins** or **Do Not Send to All Admins**, which allows you to manually add additional subscribers.



FTP instructions are not provided in this document. If you have questions about using FTP, contact your IT department or your Client Services representative.

## Email Notifications For API Uploads

Organization Administrators can specify which email addresses will receive a notification whenever a new file is uploaded via API.

They can use the following options:

- Same as the Secure FTP Alert configuration
- Custom
  - Contacts:
    - Send to All Admins
    - Do Not Send to All Admins
  - Additional Subscribers: Enter up to three email addresses. Note that they don't have to be Everbridge users.

## Managing Your Assets

To view your current list of assets by Asset Type:

1. From the **Contacts/Assets** tab, select **Assets > Asset List**.
2. From the **Viewing Asset Type** drop-down list, select the desired Asset Type.

The Assets for the selected Asset Type are displayed.

Asset Name	External ID	Last Modified By	Last Modified On
Los Angeles Office	1245		May 10, 2024 03:24 PM PDT
New York	7789		April 20, 2023 01:12 PM PDT
Chicago	5567		April 20, 2023 01:11 PM PDT
Singapore	S1		April 20, 2023 01:09 PM PDT
Toronto	T1		September 16, 2021 10:22 AM PDT

Perform the following tasks from this page:

- Edit an Asset.
- Delete Assets by Asset Type.
- Search for an Asset record by Asset Name or External ID.
- Add a new Asset individually.
- View the address location using the Geometry field in the record.
- Make a backup of your Asset file by Asset Type.

## Editing an Asset

You can edit an existing Asset. The fields you can change are the same as when you create a new Asset.

To edit an Asset:

1. From the **Contacts/Assets** tab, select **Assets > Asset List**.
2. Click the **Pencil** icon of the asset you want to change. The Edit Asset dialog is displayed.
3. Make the desired changes.
4. Click **Save**.

## Deleting Assets by Asset Type

You can delete Assets from your Organization's list of Assets. However, Everbridge recommends you also remove the desired Assets from your system of record to ensure your next upload does not overwrite your changes.

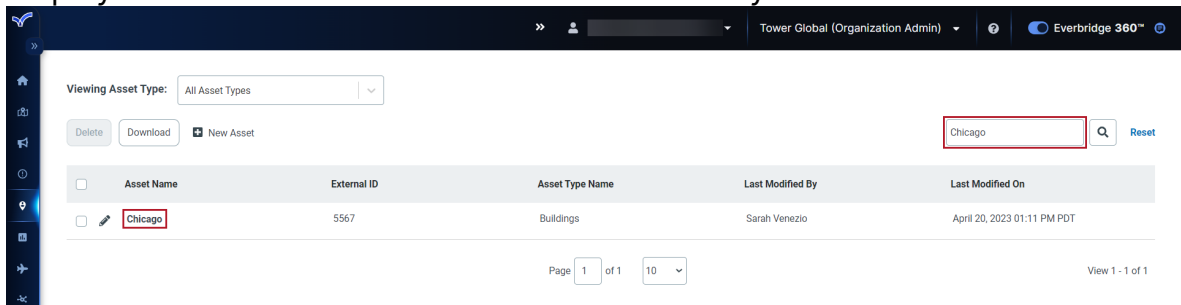
### To delete assets by Asset Type:

1. Select the Asset Type from the drop-down list.
2. Select the checkbox for each Asset to be deleted.
3. Click the **Delete** button. The Delete Asset dialog is displayed.
4. Click Delete.

## Searching for Assets

### To search for Assets:

1. From the Assets subtab, in the **Search** field, find an Asset by searching for the Asset Name or External ID of the Asset.
2. Narrow your search by typing more characters in the Search field. The list displays Asset Names or External IDs that match your filter.



## Asset Associations

Asset Associations can be created to:

- Associate Contacts or Groups with an Asset.
- Add Associations to Alert Workflow Incident Actions for dynamic Notifications.

### Create a New Asset Association Type

1. Log in to the Everbridge Manager Portal and select your Organization.
2. Navigate to **Settings > Organization > Contacts/Assets > Asset Association**.
3. Click **New Asset Association**.
4. Add Association Label, e.g., Facility Security, District Manager, Regional Manager. This can be any you choose, but each must be unique across the org (no duplicates).
5. Click **Save**.

### Link New Asset Association to Assets

To link the new Asset Association to an Asset:

1. Navigate to **Assets > Asset List**.
2. Click the **Pencil** icon for the desired Asset to edit it.

<input type="checkbox"/>	Asset Name	External ID	Asset Type Name	Last Modified By	Last Modified On
<input type="checkbox"/>	Boston Office	BOS-04	Buildings		August 26, 2024 03:42 PM PDT
<input type="checkbox"/>	Chicago Office	5567	Buildings		August 26, 2024 03:10 PM PDT
<input type="checkbox"/>	New York Office	7789	Buildings		August 26, 2024 03:10 PM PDT
<input type="checkbox"/>	Los Angeles Office	1245	Buildings		May 10, 2024 03:24 PM PDT
<input type="checkbox"/>	Singapore	S1	Buildings		April 20, 2023 01:09 PM PDT
<input type="checkbox"/>	Toronto	T1	Buildings		September 16, 2021 10:22 AM PDT

- Associations can also be linked on the **New Asset** page when creating an Asset.



3. The Edit Asset modal appears. Select **Add Association**.

4. Select which type of association you want to define for the selected Asset by choosing an option from the **Association Definition** dropdown.

5. Choose Contacts or Contact Groups to associate with this Asset.

**Contacts (Step 2 of 2)**  
 Select one or more contacts to associate with this asset.

Search by Individual's Name, Group Name or Group Description

**Groups**   Individuals

Group Name	Created On	Created By	Updated On	Updated By
<input type="checkbox"/> Administration	Sep 16, 2021		May 28, 2024	
<input type="checkbox"/> Finance	Sep 16, 2021		Sep 17, 2021	
<input checked="" type="checkbox"/> Human Resources	Mar 26, 2024		Mar 26, 2024	
<input checked="" type="checkbox"/> IT	Sep 16, 2021		May 2, 2023	
<input checked="" type="checkbox"/> Managers	Sep 16, 2021		Sep 16, 2021	
<input checked="" type="checkbox"/> Marketing	Sep 16, 2021		Sep 16, 2021	
<input type="checkbox"/> New group	Mar 26, 2024		Mar 26, 2024	
<input type="checkbox"/> Night Shift	Apr 7, 2022		Apr 7, 2022	
<input type="checkbox"/> Pasadena	Jun 6, 2024		Jun 6, 2024	
<input type="checkbox"/> Sales	Sep 16, 2021		Sep 16, 2021	

6. Check the preview of the targeted contacts and groups to make any needed changes, then click **OK**.

**Selected Contacts**   190 Unique Recipients

**Groups** 3   [Details](#)

190

**Individuals**   [Details](#)

20

7. The new association will now appear in the **Asset Association** section on the selected Asset record.

## Managing Asset Associations via File Upload

You can include your Asset-contact associations in your Asset file uploads. Once you have defined Asset Association types in your Organization, your Asset upload templates will include two new columns for each defined Association Type: one for **Contacts** and one for **Contact Groups**.

### Data Format: Associated Contacts

For Associated Contacts, the expected format is a pipe ("|")-separated list of Contact external IDs

For example, the "Site Security" Asset Association comprises two individuals, whose contact records have the external IDs "EH1002" and "Anne.Boyle@employee.com" respectively. Both Contacts will be included in "Facility Contact" communications when the associated Asset is affected.

```
Associated Contacts - Site Security
EH1002 | Anne.Boyle@employee.com
```

## Data Format: Associated Contact Groups

For Associated Groups, the expected format is a pipe-separated list of Group names.

For example, the "District Managers" Asset Association contains two contact groups: "District 9 Managers" and "District Oversight Committee". All Contacts in either of these Groups will be included in "Facility Contact" communications when the associated Asset is affected.

Associated Contact Groups - District Managers
District 9 Managers   District Oversight Committee

P	Q	R	S	T	U
Associated Contacts - District Managers	Associated Contact Groups - District Managers District 9 Managers   District Oversight Committee	Associated Contacts - Regional Managers	Associated Contact Groups - Regional Managers East Africa Regional Security Team	Associated Contacts - Site Security EH1002   Anne.Boyle@employee.com	Associated Contact Groups - Site Security Kenya Security Team   Nairobi Office Site Security Team

## Using Asset Association in Alert Workflows

- At the Organization level, navigate to **Workflow > CEM Orchestration**.
  - The above path isn't available when the Legacy UI is applied, so workflows can also be created and maintained from **Settings > Everbridge Open > CEM Orchestration > Workflow List**.
- Select a specific Workflow, then click **Actions**.

- Under **Incidents** you can select Facility Contacts to be added to your Incident Communications for the Assets affected by the alert.

**Incidents**

**Select a Category:**

Filter by Category...
▼

**Select a Template:**

Air Quality
▼

**Who is Notified?**

Contacts who are part of the incident template ONLY

Contacts who are part of the incident template AND any impacted contacts in the event area

Facility Contacts

Search...

Select all

---

Building Super

District Managers

Executive Protection

Regional Managers

Test 1

## View Associations in Visual Command Center Operator Console

To view Associations in the VCC Operator Console:

- Navigate to **Situational Awareness > Visual Command Center**.
- Access an Asset for which you've created an Asset Association and added at least one User or Group.

- The Asset Associations configured for that Asset will be displayed. If no Asset Associations are configured the Association tab will not be displayed.

