Incident Communications User Guide

Everbridge Suite

October 2024

Everbridge Suite
2024
Printed in the USA

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What is Incident Communications?

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

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

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

Incident Administrators can create Incident templates that maintain the workflow rules for your Incident Operators. Incident Operators can launch and manage Incidents assigned to their Incident Operator role.

> **NOTE:** Custom Roles also support most Incident Communications capabilities. See the *Custom Roles Guide* for more details.

What is a Communication Plan?

Incident Communications enable you to send Notifications to individuals or groups to keep them informed before, during, and after an Incident. Incident Communications enables you to automate your Incident communication plan.

Your collection of Incident templates is your communication plan within Everbridge Suite and plays a vital part in your Organization's broader plan. For example, your Organization's plan may include such actions as meeting with senior leadership or providing updates to the press. As part of that, you can include Everbridge Incident templates or include them in your Organization's standard operating procedures. An Organization can have an unlimited number of Incident templates.

Each Incident template consists of the components necessary to deliver a Notification:

- Message
- Contacts
- Publishing options
- Notification settings

Predefining your communication plan:

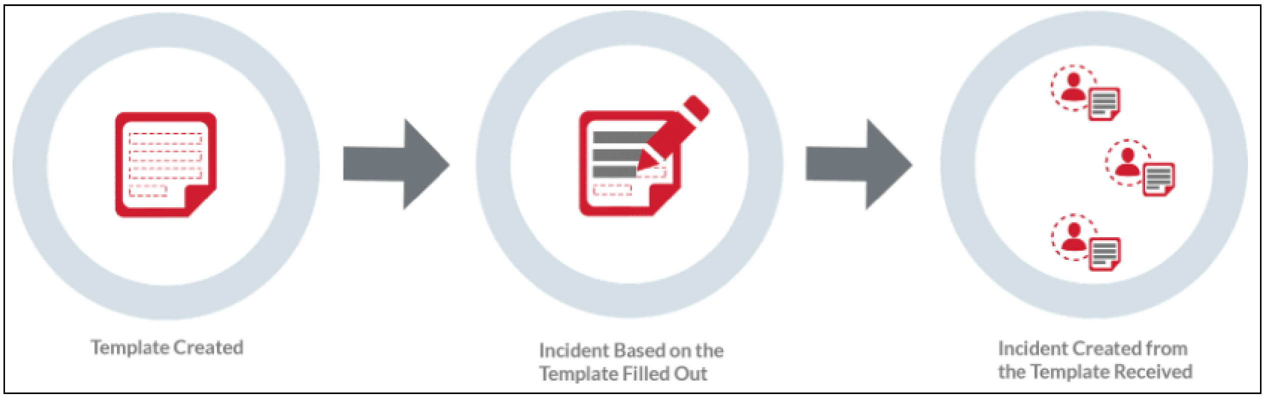
- Ensures all critical information is included in the message.
- Ensures only relevant information is included in the message.
- Targets critical stakeholders only.
- Enables faster communications in a crisis.

Since all of this information has already been set up in the communication plan, your Incident Operator does not have to stop and decide how to send the message.

From Everbridge Suite, select **Incidents** to view the status and details of all Incidents.

Everbridge Communication Plan Workflow

You create templates as a guideline for what information your Incident Operator needs to provide during an event. Your Incident Operator fills out the template fields when launching an Incident and the newly created Incident is sent out to customers.



A single Incident template has two different audiences:

- The Incident Operator who fills it out.
- The contacts who see its resulting message.

Template Considerations

Incident templates can be created to fit many different situations. You can add many variations of templates, depending on your communication plan. Consider the following points when creating Incident Templates:

- Does your operator need to input values on the operator form but not in the message?
- Do you want your operator to modify the message portion of the Notification before sending it?
- Do you want your operator to modify the distribution list before sending the Notification?
- Do you want your operator to view and modify the settings (such as delivery methods and contact paths, and if your Organization wants confirmation from the recipients)?
- Maybe you do not want to have an operator form at all. For example, when your Organization needs a generic template to send a Notification for an undefined Incident. Or, if your Organization has a pre-built alert that you do not want the operator to augment or modify.

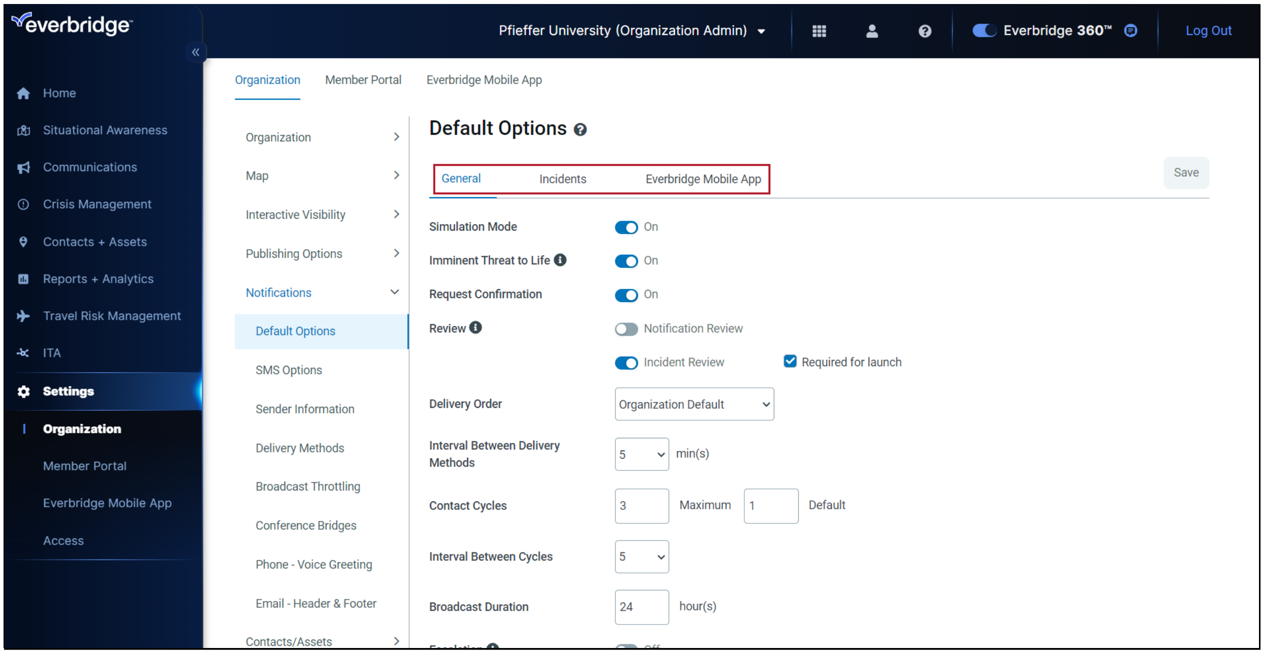
For guidance on creating Incident templates, see the Creating Incident Templates section.

Notification Settings

The Notifications Settings allow direct configuration for many default options within an Account or Organization. Configuring the most commonly used settings as the default options reduces the chances of human error while sending a Notification.

Organization-Level Notification Default Options

Set default Notification options for an Organization under **Notifications > Default Options.** There are three subtabs: General (for Notifications), Incidents, and Everbridge Mobile App.



General

Enter the default settings for the options available. When you send a Notification, you can change these settings if needed.

- **Simulation Mode** -Toggle on to enable users to practice sending Notifications and Incidents without notifying any Organization contacts. To send a Notification or Incident in Simulation Mode, users must turn off the "Go Live" toggle in the upper-right of the screen when drafting a new Notification.
  - Account Administrators (or Organization Admins) can set a user's permission to "**Restrict to simulation mode only**" for Notifications and Incidents separately. This will allow that user to only send simulated Notifications or Incidents. These settings can be configured in under **Access** > **Roles**.
- **Imminent Threat to Life** - Toggle on if your Organization uses Life Safety Notifications.
- **Notification Language** - Includes the language-appropriate text or voice prompts in each message. The Language setting is also used to convert your message text into an audio message for Notifications sent to voice path. Your users can select another language when preparing a new Notification.

- **Request Confirmation** - Request a confirmation of receipt from message recipients. For example, in a Notification sent to an email address, Everbridge includes a hyperlink for the users to confirm receipt of the message. In a voice message, users are prompted to press a key. The **Notification Report** reflects who confirmed receipt of your Notification.
    - Everbridge recommends that this setting always be turned on.
- **Review** - Enable or disable the Review step for Incidents or Notifications, and specify if it's required for launch.
- **Voicemail Preference** - Instruct Everbridge Suite how to behave if it encounters voice mail when attempting to deliver a voice Notification. You can select whether to:
    - End the call (**No Message**)
    - Leave a message (**Message Only**)
    - Leave a message along with call-back information to confirm receipt (**Message with Confirmation**)
- **Broadcast Cycles** - Sets the number of times Everbridge Suite should attempt to notify contacts.
    - In **Maximum**, enter the highest number of cycles your users can use.
    - In **Default,** enter a default value for all new Notifications, which users can change this value before they send the Notification.
        - For example, if you send a Notification to contacts who have four devices in their contact record and the Broadcast Cycle is set to **2**, then Everbridge Suite attempts to send the Notification twice to all devices.
- **Broadcast Duration** - Controls how long Everbridge Suite will attempt to notify your contacts and how long contacts have to confirm receipt of a Notification. Ensure the duration is long enough to send all of the messages. If you have a high number of contacts to whom to send messages and the duration is too short, the Notification might not be delivered to all contacts. Everbridge recommends a duration of 12-24 hours.
- **Escalation** - Allows users to define an escalation policy within a Notification under Notifications.
- **Custom Email/EMA Message** - Allows your users to include a separate message for email Notifications using a rich text formatting tool. Users can also use a separate plain text message for SMS text, fax, pagers, and text-to-speech.
    - **Always Use New Text Editor** - Selecting this will set the **New Text Editor** as the default option when using Mass Notification, Message, and Incident templates that were created before the Text Editor upgrade was released without needing to manually update each template.
- **Follow-Up/Update/Close: Include Previous Email Message** - Enable this to include the content from the previous message in a Follow-Up or Update to an Incident or Notification. This provides clear continuity of sequential

updates to an Incident for Contacts that leverage the Email delivery method. This feature applies to the following:
  - Send Update/Close to Incident
  - Send Follow Up to a Notification in an Incident
  - Send Follow Up to a Notification (in standalone Notifications)
  - Send Follow Up to an Incident Notification within a Scenario
- The previous message can be carried over only if the previous notification contains one or more of the following delivery methods:
  - Email Address 1 to Email Address 5
  - Plain Text Email - 1 Way
  - Plain Text Email - 2 Way
- **Attachment** - When an attachment size is more than 2 MB, the attachment file will be sent as attachment link in the Notification footer so that the recipient will have a link to download and view the attached files. You can set the number of days before the link expires.
- **Voice Delivery PIN** - Ensures your Notifications sent to a phone path are only heard by an authorized recipient. Select the checkbox and enter a PIN (4-10 digits). Distribute the PIN to your contacts before sending a voice Notification. When you recipients receive a voice call, they are prompted to enter the PIN before Everbridge Suite plays the message. Your message senders can disable this option when preparing a Notification if they do not want message recipients prompted for a PIN code.
- **Interval Between Cycles** - Controls how long the system waits before trying the next cycle. Everbridge recommends an interval of 10 minutes between cycles.
- **Interval Between Delivery Methods** - Controls how long the system waits before moving on to the next delivery method for a contact. For example, if the contact has four delivery methods, then this is the length of time (in minutes) the system waits before sending the Notification to the next delivery method. If the contact confirms one path, then the system does not attempt a Notification to the subsequent paths. Everbridge recommends a three-minute interval between methods.
- **Delivery Order** - Select the order of the delivery methods used for the Notification.
  - **Account Default** - The order specified in **Settings > Notifications > Delivery Methods**. This setting overrides the delivery method order specified in the contact record.
  - **Organization Default** - The order specified in **Settings > Organization > Notifications > Delivery Methods**. This option overrides the delivery method order specified in the contact record. Everbridge recommends this option as the delivery order.
  - **Contact Preferred** -The order specified in each contact's record.

    - **One-Time Custom** - Define the delivery method order for this single Notification; this option overrides all other delivery method orders.

> **NOTE:** The language setting does not translate the text. You must enter the text in the correct language.

Incidents

- **Scenario Manager** - Toggle on for Incident Management.
- **Exercise Mode** - Displays the Exercise Mode in Incident Management. When toggled on, the word **DRILL** is prepended to the message title and message text. Also, when Exercise Mode is on, you can only use Test mode for IPAWS, and live mode is disabled. If you are using Crisis Management, the checkbox is automatically enabled and you cannot disable it. If you are using Incident Communications, you can select or clear the checkbox.
- **Incident Chat** - Creates and uses a chat in your Incident Notifications.
- **Enforce Privacy** - Limits your delivery method to only the Everbridge Mobile App. Instead of the Notification subject, it displays "New private Notification".
- **Escalation** - Allow users to define an escalation policy within a Notification under Incidents.
- **Contact Batching** - Selecting the Incident Management checkbox enables messages to be sent to contacts in batches until the number of responses is met or the broadcast duration ends.
- **Send by Phone** - Allows your users to launch Notifications by phone for Incident Management.
- **Operator Confirmation** - Enables operators to confirm on behalf of Notification contacts.
- **PIN Verification** - Requires the sender to provide a 4-8 digit code before they send the Notification directly through the website or Everbridge Mobile App. This does not apply to Notifications sent through REST APIs or other automated processes. Administrators can add up to 10 Verification PINs for their Organization.

Everbridge Mobile App

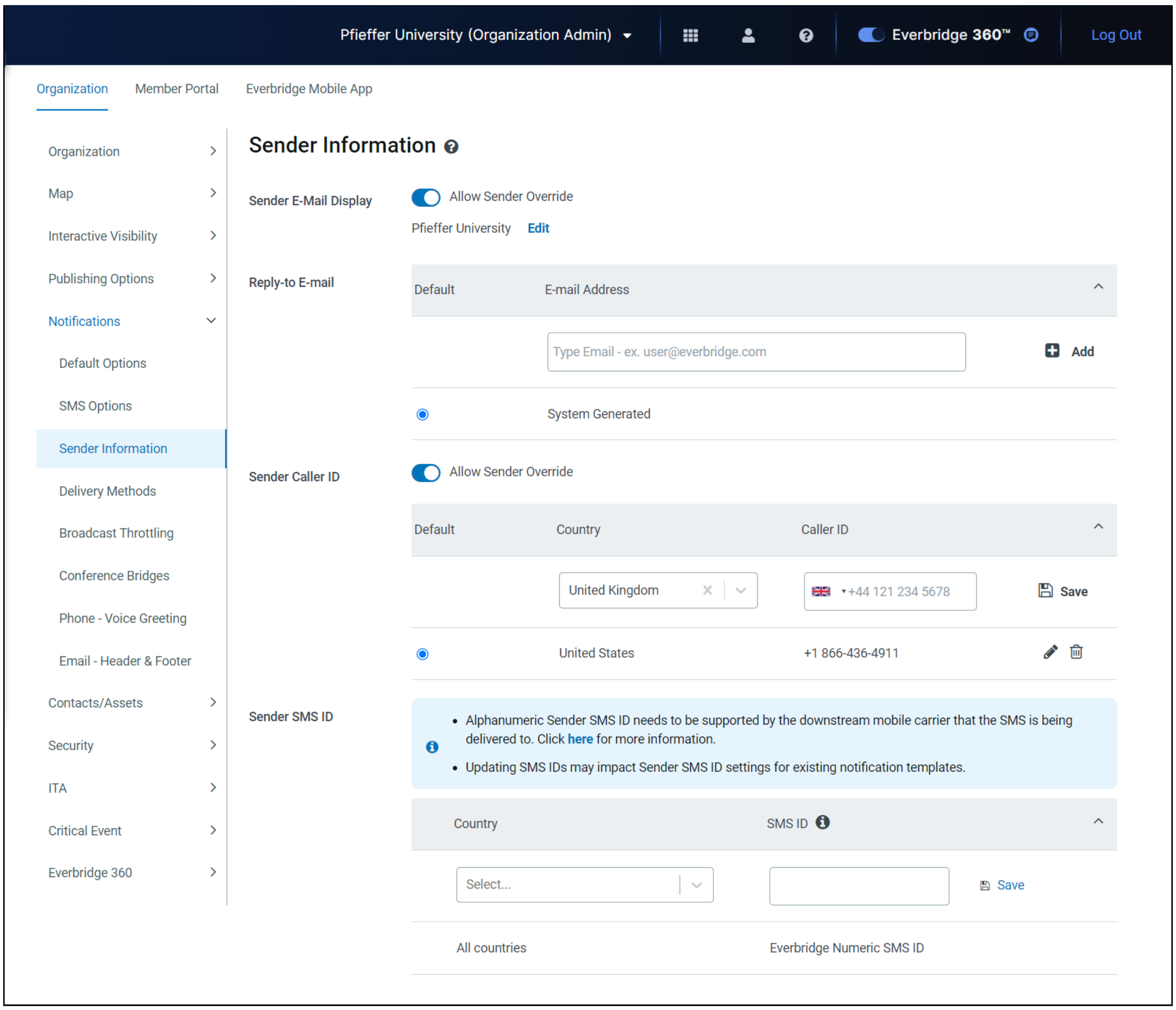
- **Message Sharing** - Allows your contacts to share Notifications you send with their extended network. Optionally, toggle default Notification sharing OFF.
- **Send Secure Push Messages**
    - **Contacts** - Sends Notifications to other devices like highway signs and reader boards. This is listed in the Everbridge Mobile Safety App settings because Everbridge uses the push alert delivery method to send the data.

- **Secure Messaging apps** - Sends secure push messages to Secure Messaging Apps.

Organization-Level Sender Information

The Organization-level **Sender Information** page is used for Notifications sent via email and phone delivery methods from an Organization. Use these features to identify yourself as the message sender to your Notification recipients, allowing you to obtain better confirmation rates.

Sender Information is configured from **Settings** > **Organization** > **Notifications** > **Sender Information**.



Click **Save** after configuring your Sender Information:

- **Allow Sender Override** - Toggle on if you want the Notification sender to edit the sender's email information when preparing a new Notification.

- **Sender Email Display** - Displays a sender name that your message recipients see in the **From** field when your email Notification arrives in their email inboxes from this Organization.
    - Set the **Sender Email Display** to a value that motivates recipients to open your email as soon as possible. For example, "Security Desk", "City Police Department", or "Office of the President". To set the Sender Email Display, click **Edit**, type the identifier, and click **Save**.
        - It is recommended not to use an email address for the value of this field as its purpose is to represent a reader-friendly name, rather than an address. Additionally, using an email address may be a red flag for some downstream spam detection filters.
- **Reply-to Email** - Displays an email address your message recipients can reply to, if needed.
- **Sender Caller ID** - Use this option for Notifications sent to voice paths to display as the Caller ID when the recipient receives the call.
    - **Default** - If you add more than one Caller ID, then choose a default Caller ID. If a call is placed to a country that does not have a defined Caller ID, then Everbridge Suite uses the default Caller ID.
    - **Country** - From the menu, select the country corresponding to the Caller ID.
    - **Caller ID** - Enter the full phone number corresponding to the selected Country. For example, if you select **United Kingdom**, then the Caller ID must be a valid UK phone number without the “44” country code. NOTE: When setting a Caller ID, keep the following in mind:
        - The Caller ID should be a valid phone number that can be called back if needed. Invalid numbers (for example, 555-555-5555, 123-456-7890) can be rejected by telephone service providers and result in your Notification not reaching your recipients.
        - The Caller ID should include the local number, without the specific 1-to-4-digit country code. (Everbridge Suite adds the international codes automatically when sending the Notification.)
        - The Caller ID value selected as Default is used when sending Notifications to any country not listed.
    - **Sender SMS ID** - Use this option for Notifications sent to SMS paths to display as the Sender SMS ID when the recipient receives the message. Custom SMS IDs will only work when supported by the local carrier. Updating SMS IDs may impact Sender SMS ID settings for existing Notification templates.
        - **Country** - From the menu, select the country corresponding to the SMS ID.
        - **SMS ID** - From the menu, enter the ID and click Save. This ID must 3-11 characters in length. The Sender SMS ID for all countries (except the United Arab Emirates and Saudi Arabia) can begin with digits (0-9). The dash character (-) is not allowed.

- **Permission** - Select this checkbox to allow the Notification sender to edit the **Sender Email Address** and **Sender Call ID** settings.

International Limitations

An increasing number of countries are enforcing strict regulations against calls originating from outside their borders using domestic caller IDs in a practice known as "spoofing." It's important to be aware that calls initiated from the Everbridge platform may appear to be originating from the US or Europe, depending on your platform login location. In regions where these calls are accepted outside the US or Europe, they will be recognized as incoming "International" calls, and therefore, an "outside" country caller ID is expected. If the system's caller ID is set to appear "local," voice providers may block the call because they can identify it as an international call with a spoofed local caller ID.

For instance, if you are making a call to a recipient with a Luxembourg phone number (+352), it's crucial to configure a non-Luxembourg caller ID, such as a +1 (US) phone number. In most cases, the specific country of the caller ID is not critical, as long as it does not match the recipient's country. Neglecting this practice could result in voice calls being restricted or not reaching their intended recipients in the respective country.

> **NOTE:** For more details on voice call limitations and anomalies, see the Support Center.

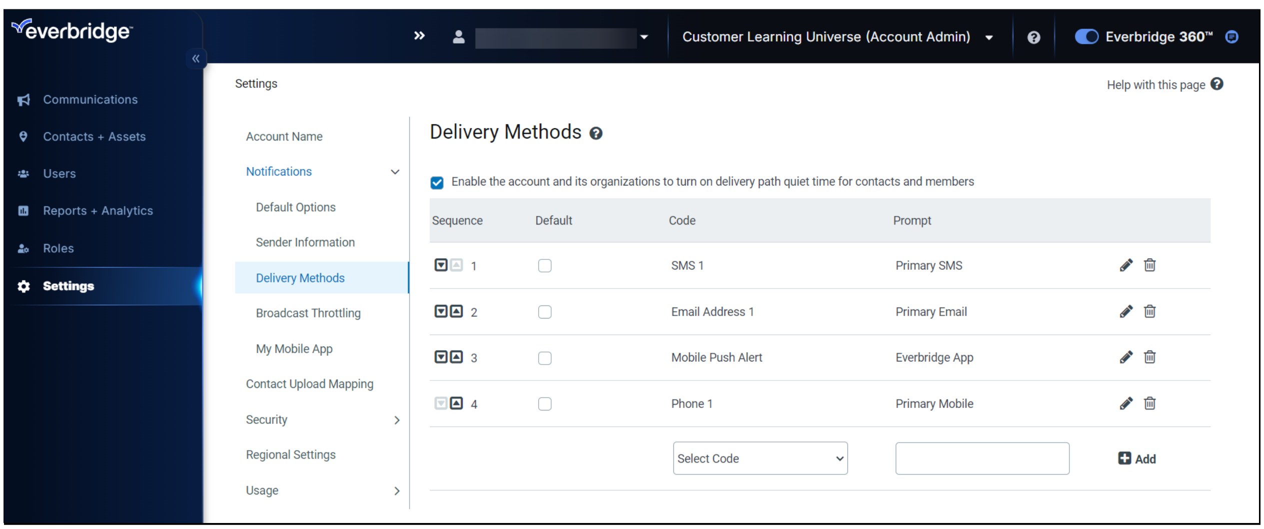
Delivery Methods

Delivery Methods specify how contacts can receive Notifications, including options like Email and SMS. These methods can be configured at both the Account Level (for Notifications sent from the parent Account) or at the Organization Level (for Notifications sent from its child Organizations).

Account Level

When configuring Delivery Methods from the Account Level (**Settings** > **Notifications** > **Delivery Methods**), Account Administrators can:

- Select any of the available Delivery Methods.
- Remove Delivery Methods.
- Assign a custom name for each Delivery Method so your users can select the correct one for their Notifications.
- Enable members to turn Delivery Methods on or off and specify quiet periods. For example, if a member sets a quiet time for 8:00 am-5:00 pm, all Delivery Methods will be turned off until 5:00 pm.

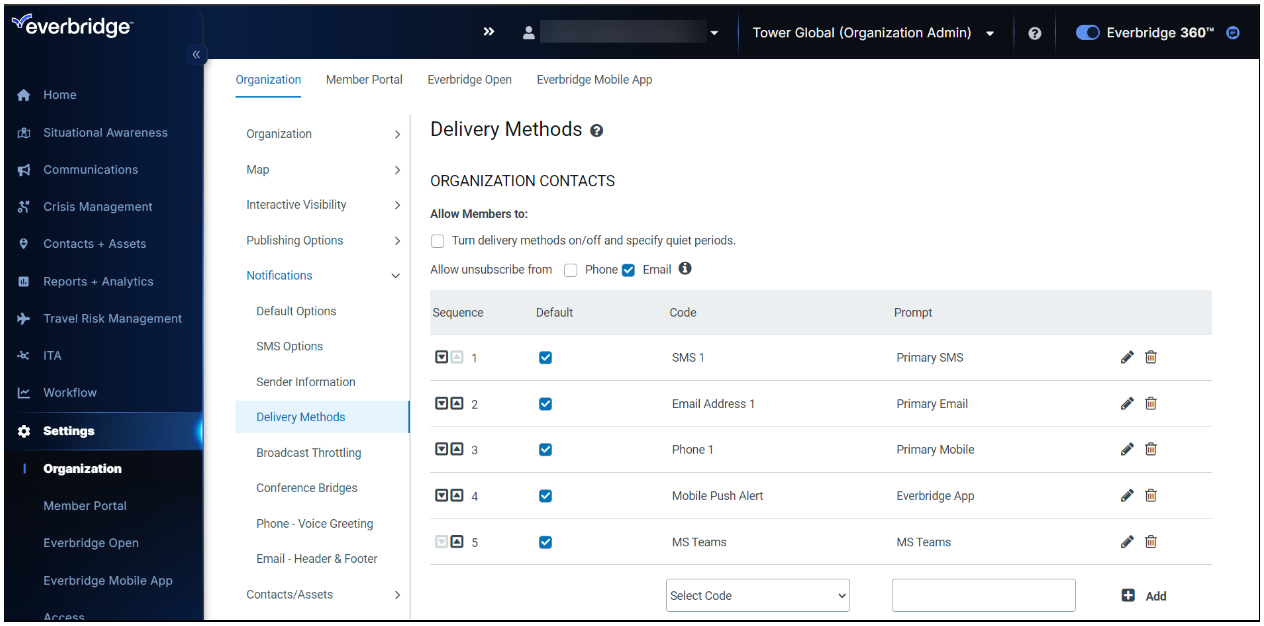


Organization Level

When configuring Delivery Methods from the Organization Level (**Settings** > **Organization** > **Notifications** > **Delivery Methods**), administrators can:

- Select any of the available Delivery Methods.
- Remove Delivery Methods.
- Assign a custom name for each Delivery Method so your users can select the correct one for their Notifications.

- If enabled at the Account Level, allow members to turn Delivery Methods on or off and specify quiet periods for the Organization.
- Allow recipients to unsubscribe from messages when they receive them via Email or SMS message.



Delivery Method Descriptions and Recipient Confirmation

The table below explains the various Delivery Methods and the different types of input required for a contact.

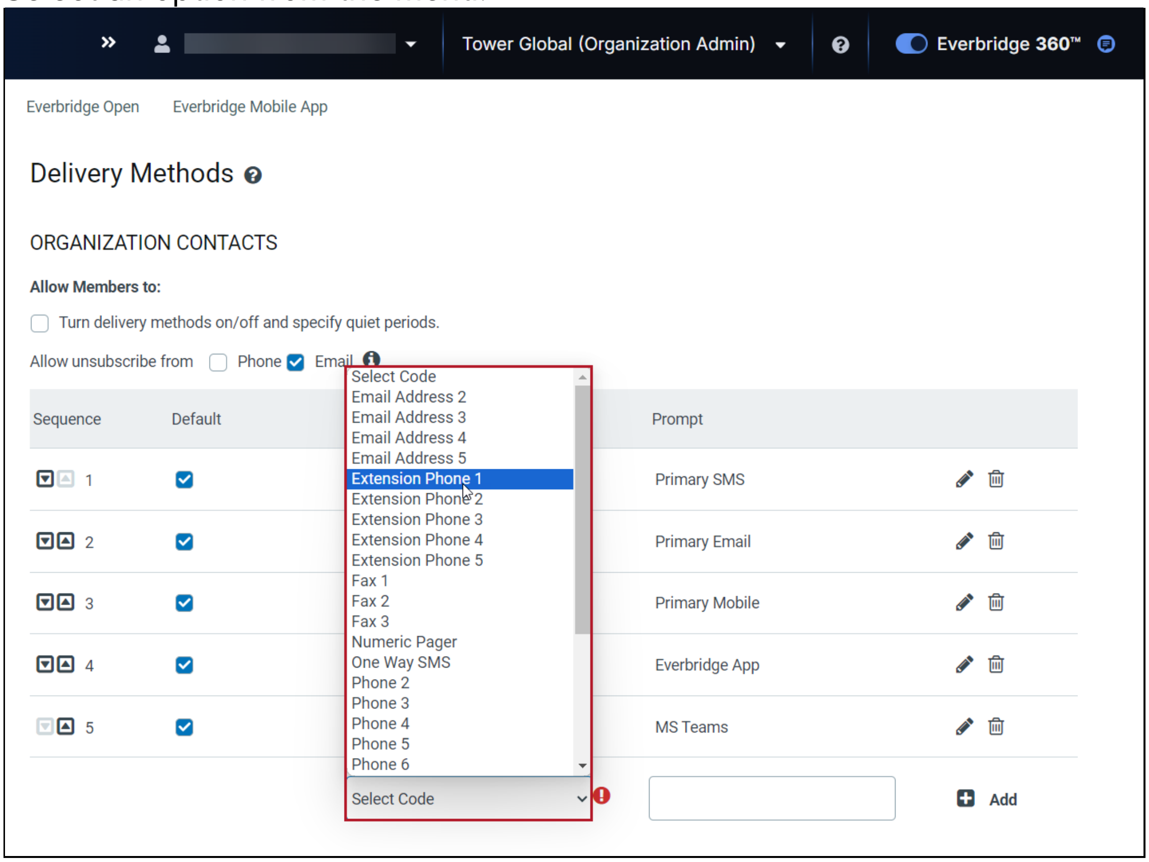
Delivery Method	Recipient's Message Format	Recipient Confirmation
Email Address	Content of Body field or Email Only field in the Notification Form.	Select **click here to acknowledge receipt of this message**.
Extension Phone #	Audio message.	• Press 1 after listening to the message. • Use the callback information to dial the phone number and enter the message ID.
Fax #	Content of the Body field in the Notification form.	Call the phone number and type the PIN provided on the fax.

Mobile Push Alert	The content of the Body field is displayed in the message field and the content of the Email Only field is an attachment to the message.	Use the REPLY feature in the app.
Numeric Pager	Audio message only.	Call the phone number provided and enter the PIN.
Everbridge Mobile App	Content of the Body as a push Notification. Content and Body in the Notification.	N/A
One Way SMS	Content of the Body field in the Notification.	Call the phone number provided and enter the message ID.
Phone	Audio message only.	• Press 1 after listening to the message. • Use the callback information to dial phone number and enter the message ID.
Plain Text Email 1-Way	Content of the Body field in the Notification.	Call the phone number provided and enter the message ID.
Plain Text Email 2-Way	Content of the Body field in the Notification.	Use the REPLY feature in the device.
SMS	Content of the Body field in the Notification.	Use the device's REPLY feature.
TAP Pager	Content of the Body field in the Notification.	Call the phone number provided and enter the message ID.
TTY	Content of the Body field in the Notification.	Call the phone number provided and enter the message ID.
MS Teams	Includes the Message Title and Body field in the Notification. Does not support attachments or two-way communications.	Confirm or answer polling questions using the included buttons.

Add a Delivery Method

To add a Delivery Method:

1. Click the **Select Code** menu at the bottom of the page
2. Select an option from the menu.



3. Type a prompt in the field next to the **Select Code** menu.
4. Click **Add**.

Configure Delivery Methods

Select from the following options to configure Delivery Methods:

1. Select the **DEFAULT** checkbox for the Delivery Methods you want pre-selected when a user creates a Notification.
   - The Notification sender can change the Delivery Methods for the Notification, but setting the defaults for the most common Delivery Methods saves time.
2. Select the appropriate checkbox to allow users to unsubscribe from phone and email delivery.
3. Define the sequence of the Delivery Methods by moving the Delivery Methods in the list.

4. Use the **Pencil** icon to edit the Prompt value or the Advanced Configuration of a Delivery Method.

Delete Delivery Method

To delete a Delivery Method, click the **Trash Bin**. The information is removed from the contact record, but the contact can add it again if needed.

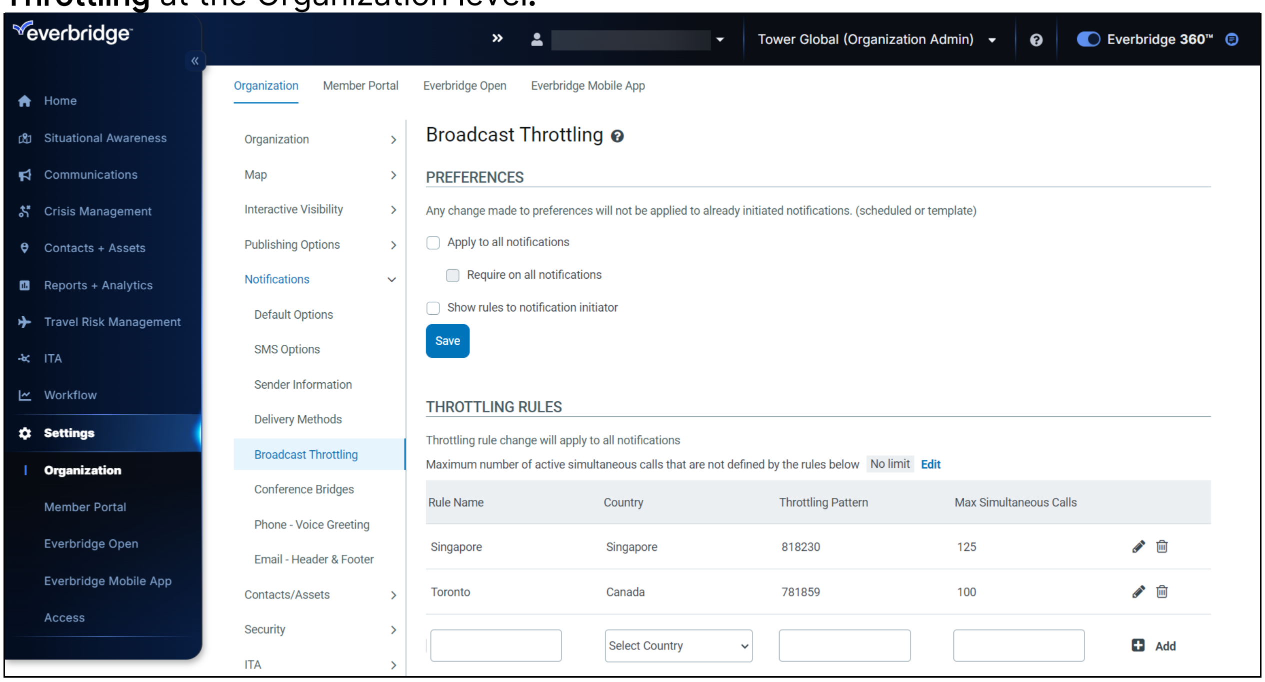
To delete a Delivery Method using the CSV file, the specific field and all of its corresponding fields must be empty. If any field still has content, then no changes occur in the contact record.

Broadcast Throttling

When you start a Notification, Everbridge tries to deliver the message as quickly as possible. If you are sending phone calls, then it is possible that the system receiving the calls cannot handle all the phone calls simultaneously. For example, a Notification might place 200 calls to an office location with a PBX phone system that can only accept 125 calls at a time.

Use **Broadcast Throttling** to control the number of simultaneous phone calls made to your jurisdiction or to your locations. For example, if the PBX or the central office can handle only 125 calls, then you could set the maximum simultaneous phone calls to 100. In this case, the Notification is sent to the first 100 calls, and not to the entire 200. It does not send another call until one of the first 100 has ended.

Broadcast Throttling can be enabled from **Settings** > **Organization** > **Broadcast Throttling** at the Organization level.



To control the number of simultaneous calls, set up rules based on the dialed number. For example, the PBX at your office starts with the phone number 818230 and might only be able to handle 150 calls at a time. Define a rule to limit the maximum simultaneous calls to that PBX to 125.

You can have different rules for different locations. You can also have a default limit for calls that do not match any of the rules.

Define a Rule

To define a rule:

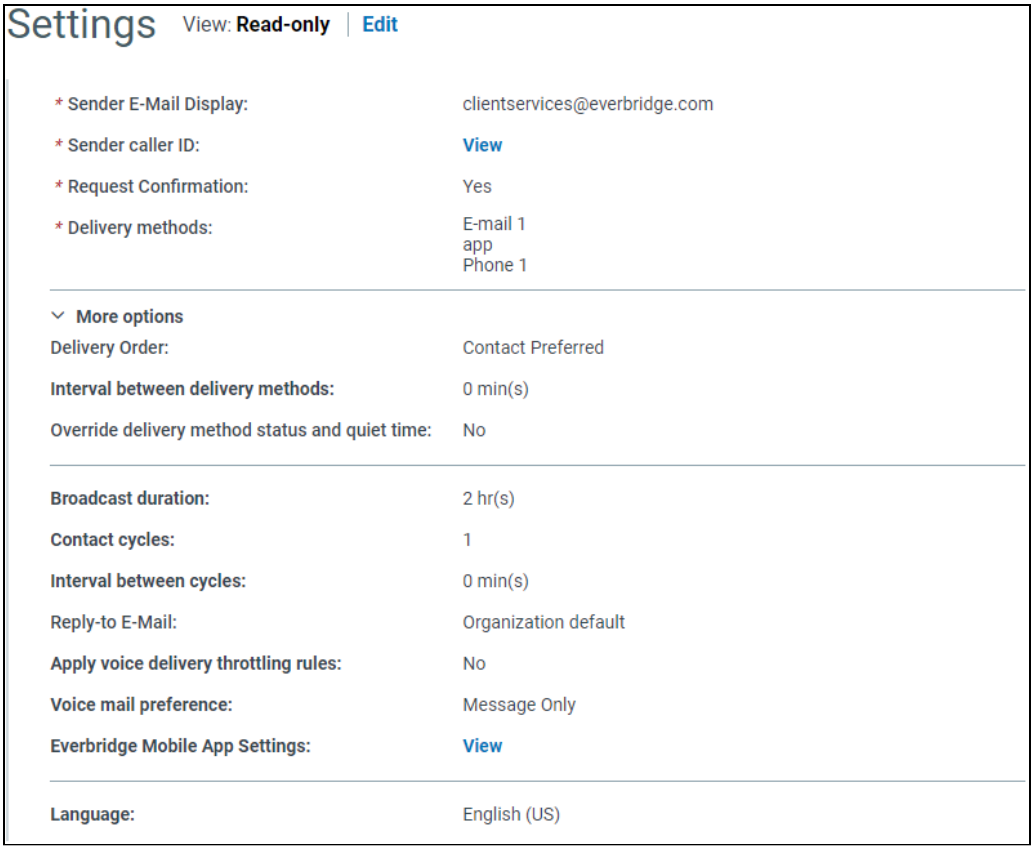
1. Type a Rule Name.
2. Select the country in which the dialed numbers are located.
3. Type the Throttling Pattern for this rule. If the phone number to be dialed for the contact matches this pattern, the **starts with** rule will be used.
4. Click **Add**. Repeat this process for any additional rules.
5. When done, click **Save**.

You can set a maximum to use if the dialed number does not match any of the rules. By default, there is no limit to the number of simultaneous calls if a throttling rule is not matched. To set a maximum number of calls, click **Edit**. Type the maximum number of calls in the text box and click **Save**.

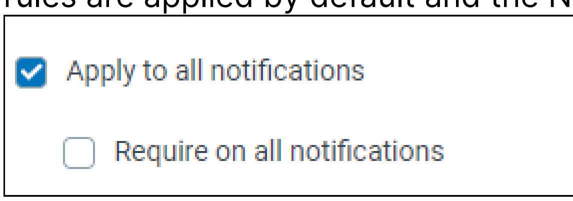
When you make changes to throttling rules, the new values are used the next time a Notification is sent, including any Notification templates and scheduled messages.

In the **Preferences** section of Broadcast Throttling, you can configure how a Notification uses throttling rules.

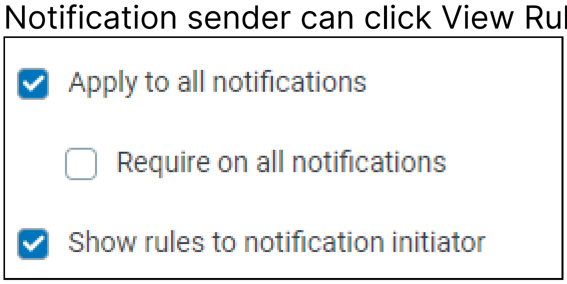
- If all the checkboxes are clear, then the throttling rules are not available to use in a Notification.



- If the **Apply to all Notifications** checkbox is selected, but the **Require on all Notifications** checkbox is clear, then the throttling rules are applied by default. However, the Notification sender can disable the throttling rules for a Notification by clearing the **Apply voice delivery throttling rules** checkbox.
- If the **Require on all Notifications** checkbox is selected, then the throttling rules are applied by default and the Notification sender cannot turn them off.



- If the **Show rules to Notification initiator** checkbox is selected, then the Notification sender can click View Rules to view the rules.

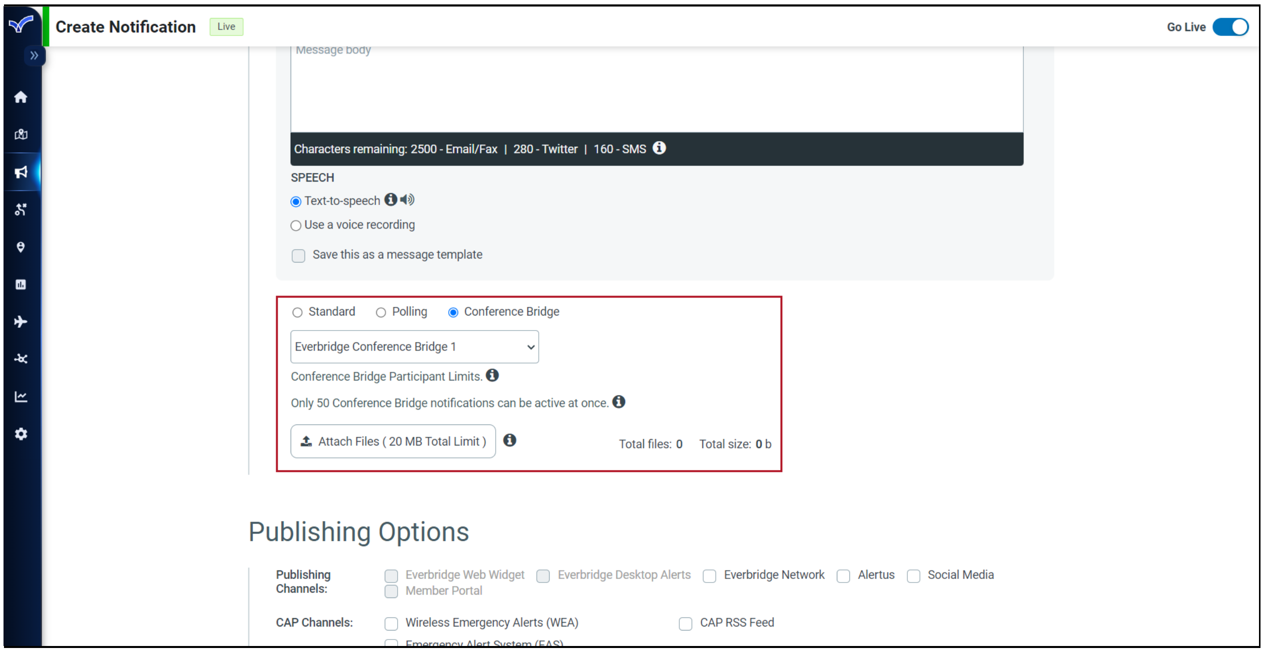


When you make changes to preferences, they apply to new Notifications. They do not affect any templates or scheduled messages you have already configured.

Conference Bridge

In a **Conference Notification**, the message is to join a conference call. This could be an emergency where contacts need to discuss the situation immediately. Or, it might be a convenient way to pull everyone together for the weekly status meeting.

You can use the provided Conference Bridges for your Conference Notifications, or you can define your custom Conference Bridges. Additionally, you can create your own Conference Bridges that do not use access codes.

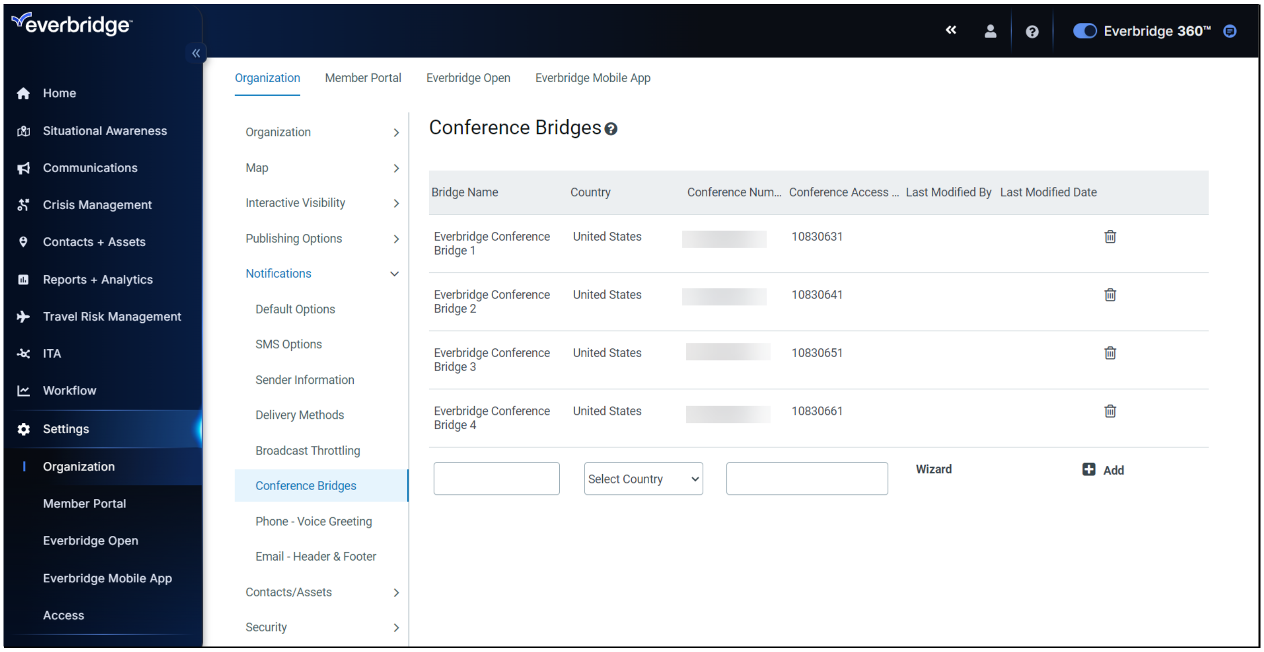


For EverBridge default Bridges, only the first 96 contacts are sent the Notification. For EverBridge custom Bridges, only the first 250 contacts are sent the Notification.

A customer-supplied Conference Bridge must support up to 250 conference callers. Contact your Conference Bridge provider if your conference call account is limited to less than 250 callers.

Custom Conference Bridges

Custom Conference Bridges can be created from **Settings** > **Organization** > **Notifications** > **Conference Bridges**.



To create a custom Conference Bridge:

1. **Bridge Name** - Enter the desired name for the Bridge; this is the name your users see in the list of Conference Bridges when preparing a Notification.
2. **Country** - Select the country that corresponds to the location of the conference service, so EverBridge Suite knows how to connect to the service.
3. **Conference Number** - Enter the phone number. Do not include the country calling. Enter the phone number in international format, as if the number was being called from outside the selected country.
4. **Wizard** - Use the wizard to either enter the Access Code or the instructions for navigating the conference service menu, such as if the conference service requires pauses and special key presses to connect the recipient to the Bridge. For example, there is a 1-second pause after you dial the conference service phone number before you hear the prompts for the menu. The conference service prompts the caller to enter the access code followed by the "#" key. The conference service then prompts the caller to confirm the access code by pressing 1. Also, assume the conference access code is 9009. Use the following steps to add the complete access code and dialing instructions.
    a. Wait for a few seconds—Click **>>** to enter a 1 in the **Access Code Steps** box (this is the pause you experience after you dial the conference service phone number and before you hear the prompt to enter the access code).
    b. Access Code (A)—Enter `9009` and click **>>** to add the Access Code to the Access Code Steps box.

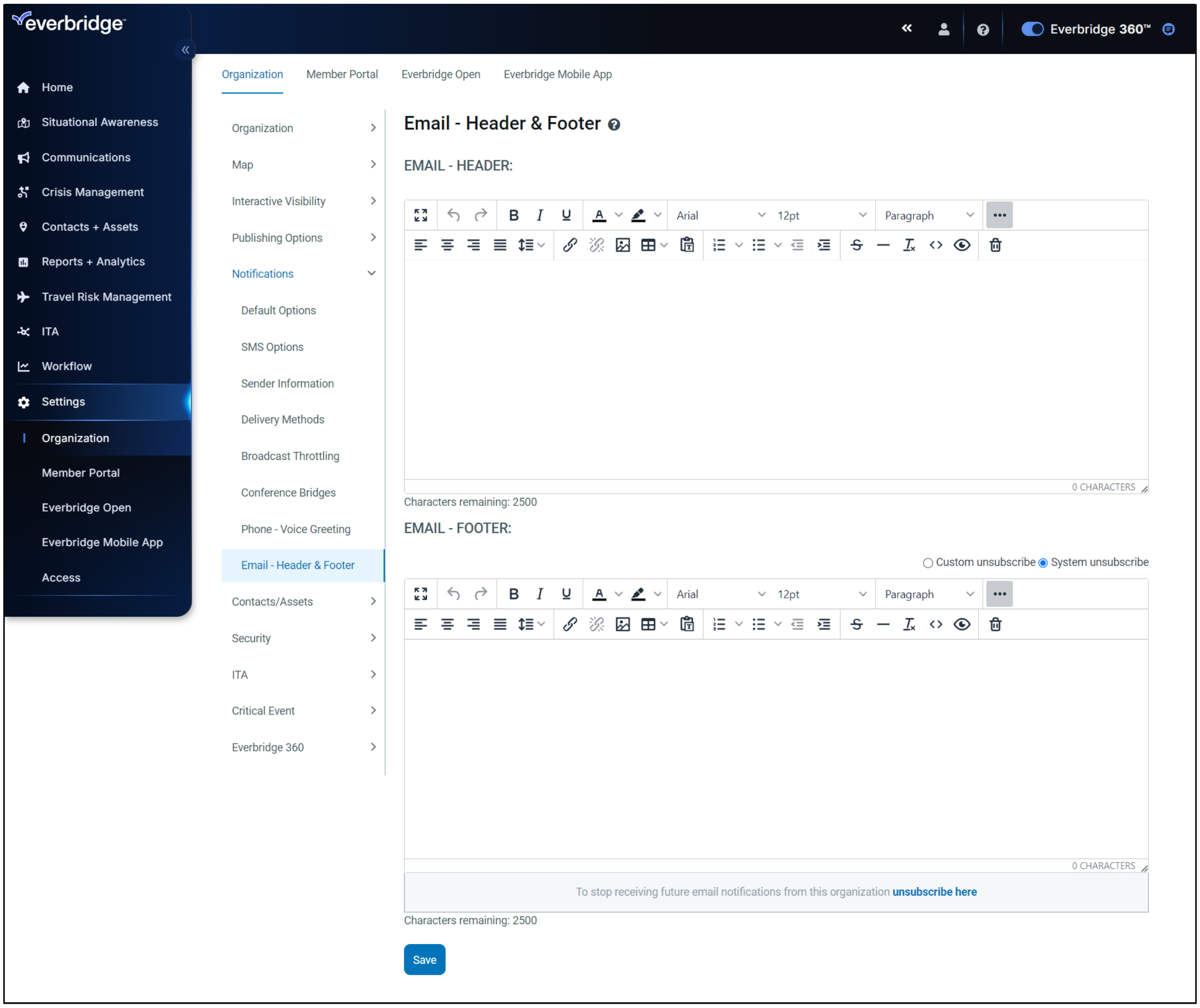
   c. Dial # or 0-9—Select "#" from the list and click ">>" to add this character to the Access Code Steps box.
   d. If needed, change the order of the steps by selecting a step and pressing the Up or Down arrows.
   e. If needed, click the Trash Bin to delete a step and start again.
   f. Click **OK** to save your access code string and close the pop-up box.
5. Click **Add** for your new Conference Bridge entry to save the new record. Your users can now select this Conference Bridge for the Conference Notifications.

Email - Header and Footer

You can insert a custom header and footer to your Notifications sent via email using the **Email Address 1, Email Address 2**, **Email Address 3**, **Email Address 4**, or **Email Address 5** Delivery Methods. If you use this option, then Everbridge Suite inserts this custom content into all email Notifications, and your users do not have the option to view, edit, or disable this option in the Notification form.

When you send a message via email, Everbridge Suite automatically inserts your custom header and footer before sending the email to the recipient.

You can add a header, a footer, or both from **Settings** > **Organization** > **Notifications** > **Email - Header and Footer**. You can use up to 2,500 characters in each text box. Your header/footer can include an image. The image URL must end with an image format file extension. For example, .jpg, .png, or .svg).

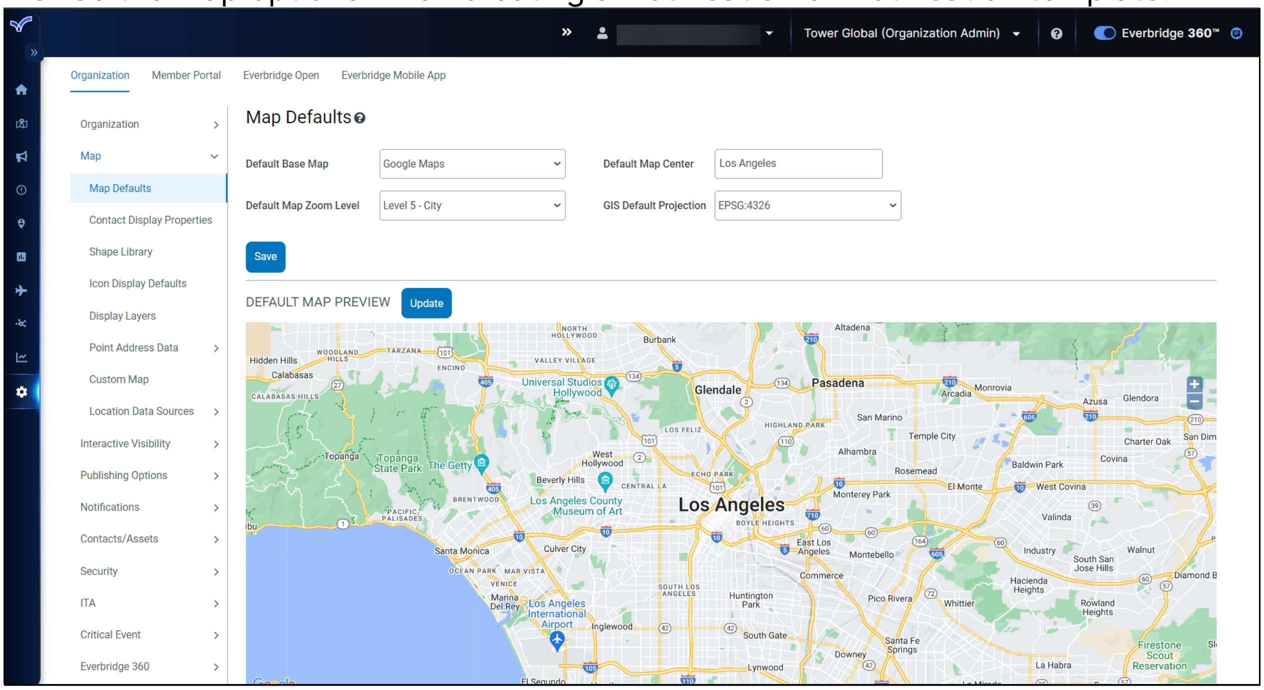


In addition, in the footer, choose a **System unsubscribe** link or a **Custom unsubscribe** link. For **Custom unsubscribe**, type the unsubscribe link text. Click **Save** to activate custom content.

NOTE: The custom header and footer might not appear exactly as configured on all email systems. The System Unsubscribe preview is always in US English; the actual output on the email Notification will be in the language of the Notification.

Map Settings

The adjustments made in **Settings** > **Map** affect the map in the **Universe** tab, as well as the map options when creating a Notification or Notification template.



Map Defaults

You can configure your map defaults for use in the Map widget in the Manager Portal from **Settings** > **Map** > **Map Defaults**. These defaults include:

- **Default Base Map** - The default base map your users see when they open the map widget in the Manager Portal. Locations and selection shapes are displayed on this map. Users can change the base map for their personal view within the map widget, but their selection won't alter the Organization's default map setting. Options include:
  - Google Maps
  - Bing Maps
  - ESRI Streets
- **Default Map Zoom Level** - The starting resolution level when your users open the map widget. Your users can zoom in or zoom out when they open the Map.
  - Level 1 - World
  - Level 2 - Country
  - Level 3 - State
  - Level 4 - County
  - Level 5 - City

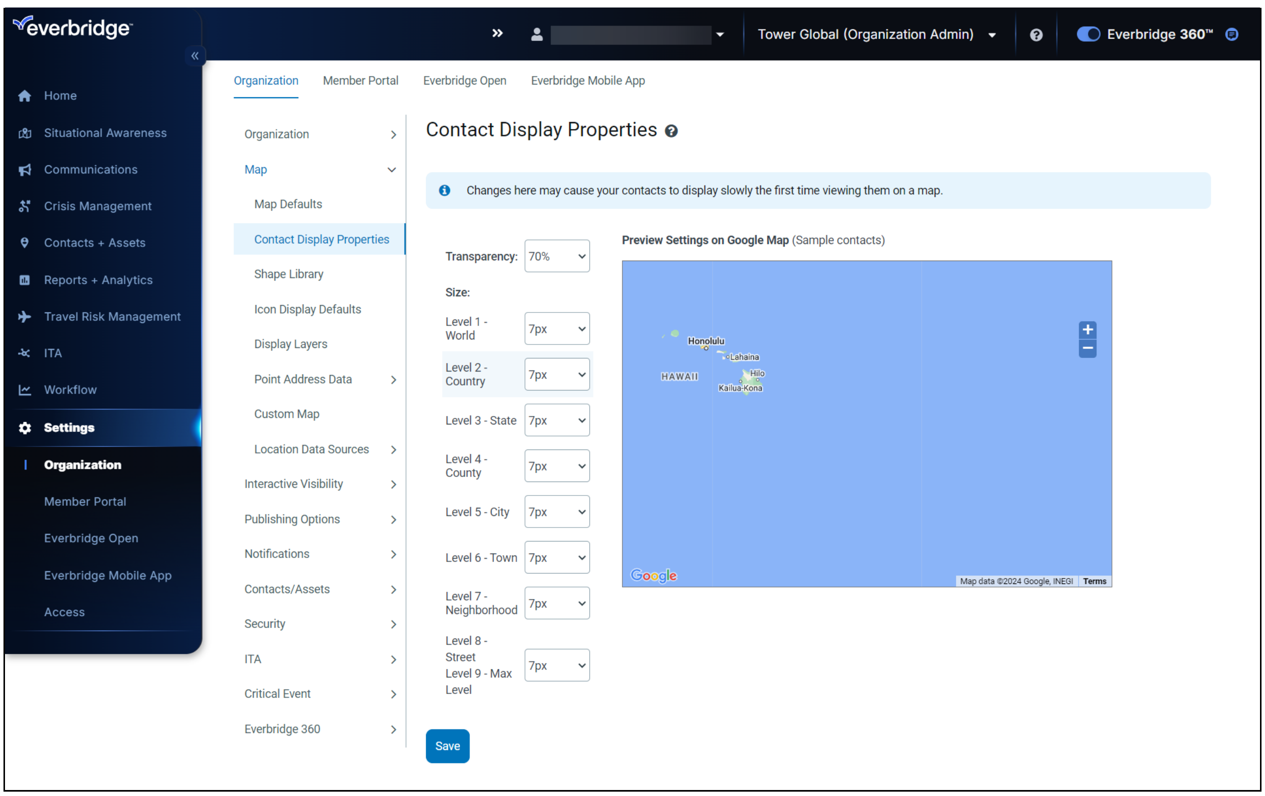
- Level 6 - Town
- Level 7 - Neighborhood
- Level 8 - Street
- Level 9 - Max Level

- **Default Map Center** - The default location on which the application focuses the map when your users open the map widget. Your users can change the focus of the map in the map widget for their Notification purposes.
- **GIS Default Projection** - Used when processing the locations in your contact CSV file if the location contains Latitude and Longitude values.

Click **Save** after making any changes to the Map settings.

Contact Display Properties

You can set the transparency and size of your contact location icons on the map. This is useful, for example, when focusing on an area with a large group of contacts.



Select values that enable users to distinguish the icons for the various record types and to identify information on the map.

Shape Library

Upload predefined polygons your users can use to select contacts from the map for a Notification. This step could eliminate the need for users to draw commonly used polygons before preparing the Notification.

Requirements

- Shapes must be single, closed-loop polygons.
- The file can contain multiple polygons, which you will be able to load or hide separately on the map.
- Shapes must be in WGS1984 projection (EPSG:4326 and EPSG:3857 data formatting) and must contain fewer than 5,000 vertices.
- Do not load polygons with holes, for example, donut shapes.
- Shapes must be submitted in compressed file format (.ZIP). KML files cannot be compressed.
- Do not load multiple shape files via REST API.

Importing Regions Into the Shape Library

You can upload files using one of the following formats:

- A Keyhole Markup Language (KML) file, which must not be compressed. The maximum file size is 100 MB.
- A compressed Shape (SHP) file. Do not include nested folders in the compressed file (zip file). In other words, the zip file can only contain the shapes. The maximum file size is 100 MB.

To import a region:

1. Navigate to **Settings** > **Map** > **Shape Library**.
2. Click **Import region file**.
3. In the **Region Name** field, enter the shape name as it will appear to users.
4. Select a folder for the file, if available.
5. Click **Upload to portal**.

> **NOTE:** You can add folders before uploading shapes, or you can later move loaded shapes between folders or into a folder.

Managing Folders and Shapes in the Shape Library

Use the following procedures to manage folders and shapes in the Shape Library.

Add a Folder

To add a folder:

1. Navigate to **Settings** > **Map** > **Shape Library**.
2. Click **New Folder,** located at the top of the pane. The application displays a folder at the bottom of the folder list with the default name new folder.
3. Enter the desired folder name (maximum 80 characters, including spaces).
4. Either press ENTER or click in a different area of the page to save the change.

Rename a Folder

To rename a folder:

1. Navigate to **Settings** > **Map** > **Shape Library**.
2. Select the desired folder name to display the edit icons.
3. Select the Pencil to enable the folder name field.
4. Click in the **Name** field and edit the folder name.
5. Either press **ENTER** or click the mouse in a different area of the page to save the change.

Delete a Folder

To delete a folder:

1. Navigate to **Settings** > **Map** > **Shape Library**.
2. Select the desired folder name to display the edit icons.
3. Select the Trash Bin. The application prompts you to confirm.
4. Click **OK** to delete the folder.

> **NOTE:** If you delete a folder that contains shapes, then the application also deletes the shapes. Move the shapes to another folder if you want to keep the shapes.

Move Shapes Between Folders

To move shapes between folders:

1. Navigate to **Settings > Map > Shape Library**.
2. Expand the folder containing the desired shape.
3. Select the desired shape.
4. Drag the shape to the desired folder.

Export a File

To export a Shapefile or KML file:

1. Navigate to **Settings** > **Map** > **Shape Library**.
2. Locate and select the desired shapes.
3. Click **Export Selected**. The selected files are downloaded.
4. Follow your browser's instructions for storing the shape on your local resource.

Icon Display Defaults

You can configure which Record Types and Building Layers should display by default for your users who navigate to the Universe Map pages of Everbridge Suite. This helps your users by reducing the number of objects they see on a map at a glance.

By default, all checkboxes are enabled. Clear the check boxes you want disabled and click **Save**.

Display Layers

You can upload any shape to overlay on the map as a reference. For example, your Display Layer could be county or city boundaries, school district buildings, or school buildings. Shapes loaded into the Display Layers library cannot be used to select contacts from the map for a Notification. This feature does not support multi-part polygons. Your file can contain multiple shapes to load or hide separately on the map.

Organization Publishing Options

Everbridge Suite offers several options for sending Notifications to a gateway. This allows a wide distribution of important information for an Organization to its followers, even if they are not Everbridge contacts or users.

A publishing option is visible only if it is enabled for your Organization.

Social Media

Everbridge Suite allows Notification publishing to the following Social Media outlets:

- **Facebook** — Administrators can post Notifications to Facebook pages that they administer.
    - Click **Sign in with Facebook** and follow the directions on the sign-in page that appears.
- **Twitter** — Administrators can post tweets to Twitter accounts that they administer.
    - Click **Sign in with Twitter** and follow the directions on the sign-in page that appears.

The table on the **Social Media Accounts** page shows the status of the alert and its expiration date. Messages posted to Facebook expire after 60 days, while messages posted on Twitter do not expire.

Everbridge Network

Use this Publishing Option to post messages within the Everbridge client community. This may be of benefit to you if you would like other Everbridge clients to be informed of an event or incident affecting your Organization.

The Notification will be published to the Organizations and/or areas you have indicated. Optionally, you can use a shape to specify the impacted area to your network.

Organization Identity

Use this option to configure whether your Organization's logo will display when messages are published. You can also select from the following areas of responsibility for your Organization:

- **None**

- **Upload shape**
- **Shape Library**

Subscribe & Publish

Use this option to select specific categories of Organizations to which to send Notifications. This is useful, for example, if you want to send Notifications to specific industries. You can also configure your network's **Subscribe & Publish** settings. Click Save when you have made changes.

To choose specific categories of Organizations:

1. Select **Only those in specific categories**.
2. Click **specific categories**. The **Select Categories** dialog appears.
3. Select one or more categories and click **OK**.

Audio Bulletin Board

The Audio Bulletin Board is a feature that enables an audience to retrieve an audio message at their convenience. It is similar to a voice mail system, where you leave a message and others retrieve the message.

This feature is useful for reaching all the contacts affected by an event or an incident that would affect those contacts. For example, use this feature to notify the surrounding community of the status of a hospital or government building that was closed for safety reasons.

There are two types of Audio Bulletin Boards: **Basic** and **Premium**. If an Organization has more than one Audio Bulletin Board, the different bulletin board names appear after selecting the Bulletin Board's check box. To configure a different bulletin board, click the arrow next to its name.

Everbridge Web Widget

By configuring an Everbridge Web Widget URL, you can send notifications to your designated website. You can configure a pre-selected default duration, which can be the same as the Broadcast Duration or a Custom duration by selecting from the drop-down list:

- 15 Minutes
- 30 Minutes
- 60 Minutes
- 1 Day (24 Hours)
- 3 Days (72 Hours)
- 1 Week (7 Days)

- 2 Weeks (14 Days)
- 1 Month (30 Days)
- 2 Months (60 Days)
- 3 Months (90 Days)
- 6 Months (180 Days
- 9 Months (270 Days)
- 1 Year (365 Days)

Everbridge Desktop Alerts

You can send a Standard Notification directly to your recipients' desktops. The recipients must have the Desktop Alerts client installed. Optionally, you can configure a default template or one must be selected later. These Desktop Alert templates are preconfigured for your Organization. You can configure a pre-selected default duration, which can be the same as the Broadcast Duration or a Custom duration by selecting from the drop-down list:

- 15 Minutes
- 30 Minutes
- 60 Minutes
- 1 Day (24 Hours)
- 3 Days (72 Hours)
- 1 Week (7 Days)
- 2 Weeks (14 Days)
- 1 Month (30 Days)

Web Posting

To initiate Notifications to partner systems or client-side websites, you can provide one or more URLs. As needed, provide a corresponding username and password for each URL. When sending your Notifications, you can select Web Posting as a publishing option and then select the check box for the specific URLs.

> **NOTE:** Since each implementation is unique, it is recommended that you work with your IT department to ensure proper configuration of the Web Posting feature.

Customer Web Service Requirements

The **Customer Web Service** receives the HTTP POST Notification from the Everbridge system.

To set up the Customer Web Service to receive Everbridge Notifications, the web service must meet the following requirements:

1. The web service must exist and be reachable from the Internet.
2. The web service endpoint must accept an HTTP POST of content type "application/json" with a JSON encoded body.
3. The web service may use HTTP Basic Authentication.
4. The web service may use SSL/HTTPS.
5. The web service must respond with a valid HTTP status code as an acknowledgment for successful or unsuccessful receipt of the Notification.

> **NOTE:** Response codes returned by external web services are logged by Everbridge for troubleshooting purposes. They are not currently reflected in the Notification reports in the Everbridge Notification Reports through the Manager Portal.

Everbridge Notification Format

An Everbridge Notification sent to the web service endpoint will be JSON-encoded and will have the properties shown in the following sample message:

{"title" : "Notification Title", "body" : "Notification Body", "fileAttachments" : ""}
fileAttachments will not yet produce the Notification Attachment. This functionality is coming soon.

JSON parsers are available for most programming languages. Your web service endpoint should parse the above message. After parsing the message, you can perform whatever logic you desire using the properties of the message.

Everbridge Configuration

Once the web service endpoint is working as described, you can configure the service in your Everbridge settings:

1. Select **Organization** >**Publishing Options** >**Web Posting** in the Everbridge web interface.
2. Click **Add** on the right-hand side under Web Posting Settings.
3. Input the following values:
   a. **URL**: The URL to which you want to POST an Everbridge Notification. The URL must be accessible via the Internet.
   b. **Display Name**: The name this URL POST should have in the Everbridge UI when creating a Notification.
   c. **Username**: IF the URL requires HTTP BASIC Authentication, the username for the URL.

   d. **Password**: IF the URL requires HTTP BASIC Authentication, the password for the URL.
4. Click **Save**.

Having followed these steps, you will see the value you set in "Display Name" when you select the **Web Posting** checkbox during Notification creation. Selecting the option will send a message to your web service.

Stopping or Expiring a Web Posting Notification

Customers using the **Web Posting Notification** feature currently have two options to stop or expire a Notification:

- Develop logic on the Customer Web Service to remove or replace a Notification based on your own business requirements (for example, elapsed time, updated HTTP POST, and so forth).
- Develop a web service call to Everbridge's REST API for Notification Configuration element in order to determine if the Notification Title is listed as an active Notification. This call can be executed at an interval of your choosing, but not recommended at less than 5 minutes from the time of receipt of the original HTTP POST.

CAP Channels

SAME codes

The **SAME Code** (Specific Area Message Encoding code) is a NOAA-provided code that extends the 5-digit FIPS code to 6-digits by enabling the first digit (left-most) to be used to identify a sub-geographical area in a county.

The SAME code value must be 6-digits; for example, 006037. The current list of SAME codes is available at https://www.weather.gov/nwr/counties

An Organization must include at least one SAME code. Only agencies with permission to send messages to more than one county in a state will have more than one value in the list. If the list is populated with more than one SAME code, the administrator can sort the list as desired.

The Geographical Description enables the administrator to set a label for each code to assist other administrators with troubleshooting. Enter the SAME Code and its description, then click **Add** for each individual entry. If there are multiple SAME codes, the administrator can click the up or down arrows to re-sequence the list.

Lastly, if the Live mode key password is stored, the **Auto-Generated Codes** button becomes enabled. Clicking the button generates a pop-up warning that all existing SAME codes will be deleted. Instead, all the SAME codes based on the GetCOGProfile settings are auto-populated.

Sender Agency Name

Administrators can enter one or more Sender Agency names. Type the Sender Agency Name and click **Add**. If there are multiple Sender Agency names, the administrator can click the up or down arrows to resequence the list.

Defaults

The administrator can hide fields on the form, as needed. Initially, all fields are exposed to the user on the Notification form.

Clear the corresponding check box to hide a field. In addition, the administrator can select the **Default Values** for each field. This eliminates the possibility of the user entering incorrect values on the user form.

The **Urgency**, **Severity**, and **Certainty** fields cannot be hidden on the Notification form. These fields are dependent on the **Event Name** selected in the Notification.

IPAWS

- IPAWS (Integrated Public Alert and Warning System) is a planned multi-agency emergency population warning system in the United States, hosted by FEMA. The channels are available to agencies with valid COG IDs. The agencies can send messages to the public via mobile phones, radio, and television.
- Wireless Emergency Alerts (WEA)
- Emergency Alert System (EAS)
- COG-to-COG (CAPEXCH)
- CAP RSS

To fill in the fields on this page, click **Choose File** for the Production Certificate or the Test Certificate. Then, double-click the file. Next, type the COG ID as provided to you by FEMA, type a COG ID Alias, and click **Save**. Repeat this process for the other Certificate.

Optionally, click the checkbox to save the credentials so they do not have to be entered when sending. If selected, fill in the **Private Key** and **Keystore Password**.

Enter a **Launch Passcode** (minimum of 8 characters). When the credentials and Launch Passcode are saved, the user will be prompted to enter the Launch Passcode on every page that credentials are prompted to enter:

- IPAWS Send Notification page
- IPAWS Interactive Visibility widget on the Universe page
- Get COG Profile

NOTE: When sending to the publishing option, you do not select a list of recipients, and the message recipients cannot confirm receipt or reply.

After the third time of incorrectly entering the Launch Passcode, the user can enter the Private Key and Keystore Password instead, or, for security reasons (in case the user account is compromised), wait 60 minutes to enter the correct Launch Passcode.

When needed, click **Get COG profile** to upload the Production or Test certificate. The **Keystore Passcode** dialog appears. Fill in the **Private Key** and **Keystore Password**, then click **OK**. The system retrieves the COG Profile, displaying the information. Click **OK** or **Print**, then **OK**. The application converts all fields to read-only format and stores the three entries as one record for the Organization. The page displays the audit information: time stamp and full name of the user who last updated the content of this page. This COG "common name" value that FEMA sends in the email to alerting authorities is not currently needed when sending Notifications.

The current format of the COG Alias is **IPAWSOPEN{COGID}**. You will receive the COG ID in an email from FEMA when you are granted credentials to send messages.

For more information about IPAWS, see the *Everbridge IPAWS User Guide*.

Alertus

The **Alertus Profile** provides a way for personnel to relay important emergency alerts through Alertus, an Everbridge Partner providing desktop alerts, alert beacons, and digital signage.

On the Alertus side, there are steps you need to take. From Alertus, refer to the *Alertus - Everbridge Integration* document for detailed instructions. The document explains how to:

- Allow the Everbridge Mass Notification application to communicate with the Alertus Server.
- Make a required configuration change to the Alertus Server.
- Create one or more Alert Services that launch a Notification in Everbridge Suite.

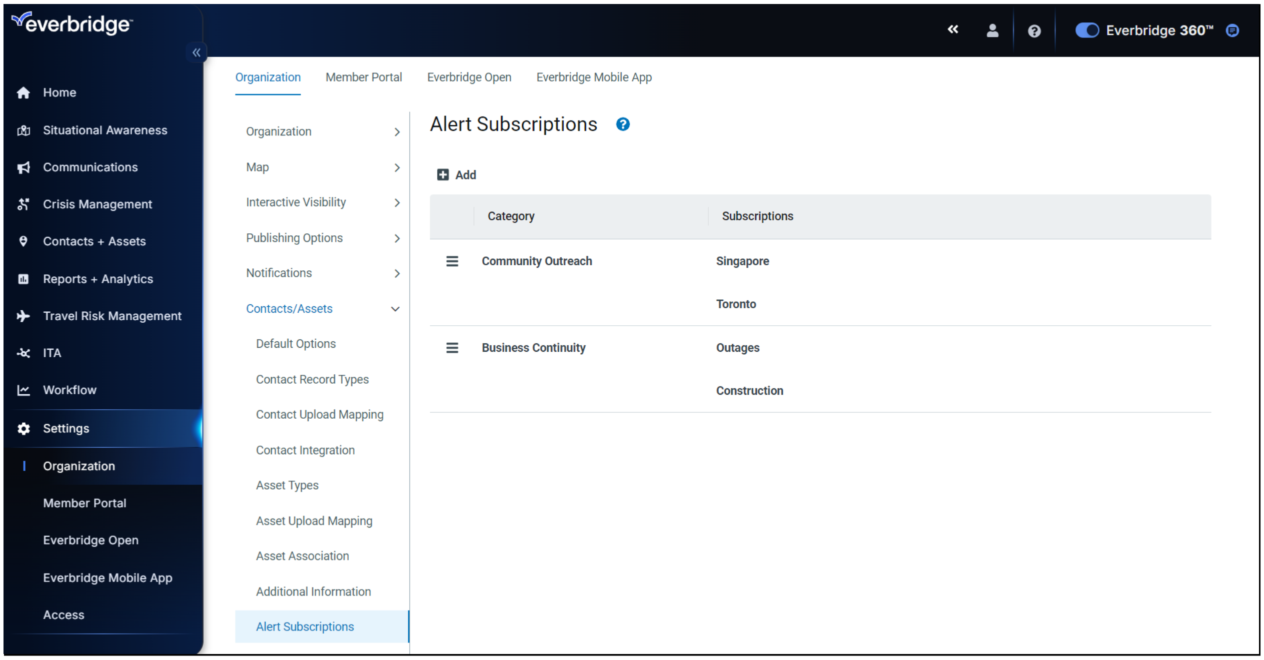
Contacts and Groups

Use the settings in the **Contact and Groups** section to create record types, additional information questions, and subscription fields. You can also configure Secure FTP settings.

NOTE: Customers using Asset Management will instead see the **Contacts/ Assets** menu item.

Alert Subscriptions

You can add types of Notifications to which the contact can subscribe from **Settings** > **Contacts/Assets** > **Alert Subscriptions.** For example, you could offer to notify contacts about several types of traffic conditions in your area.



To add a new custom Alert Subscription value:

1. Click **Add**. The **Custom** radio button is selected by default.
2. From the **Type** field, select the type of field to add from the drop-down list:
   - **Custom** - Can have any values you choose. Type your values, as needed. Select **Add another item to add additional values**. Optionally, click either **Sort: Alpha A-Z** or **Alpha Z-A.**
   - **Weather** - Offers a list of predefined values for different weather conditions. To add Weather subscriptions, see *Setting Up Your Organization for Automated Weather Alerting* in the *SMART Weather Alerting User Guide*.
3. Type a name for the **Alert Subscription** field. This name is shown on the Member Portal page when the contacts are making their selections.
4. Enter a value.
   - To enter more than one value, click the link: **Add another item**, and continue to enter values as needed.
   - To sort your values, click either **Sort: Alpha A-Z** or **Alpha Z-A.**
5. Click **Save**.
6. Optionally, reorder the categories by dragging the row to its location.

To edit a field, click its name in the list. Click in a text box to edit the name or values. Click **Save**.

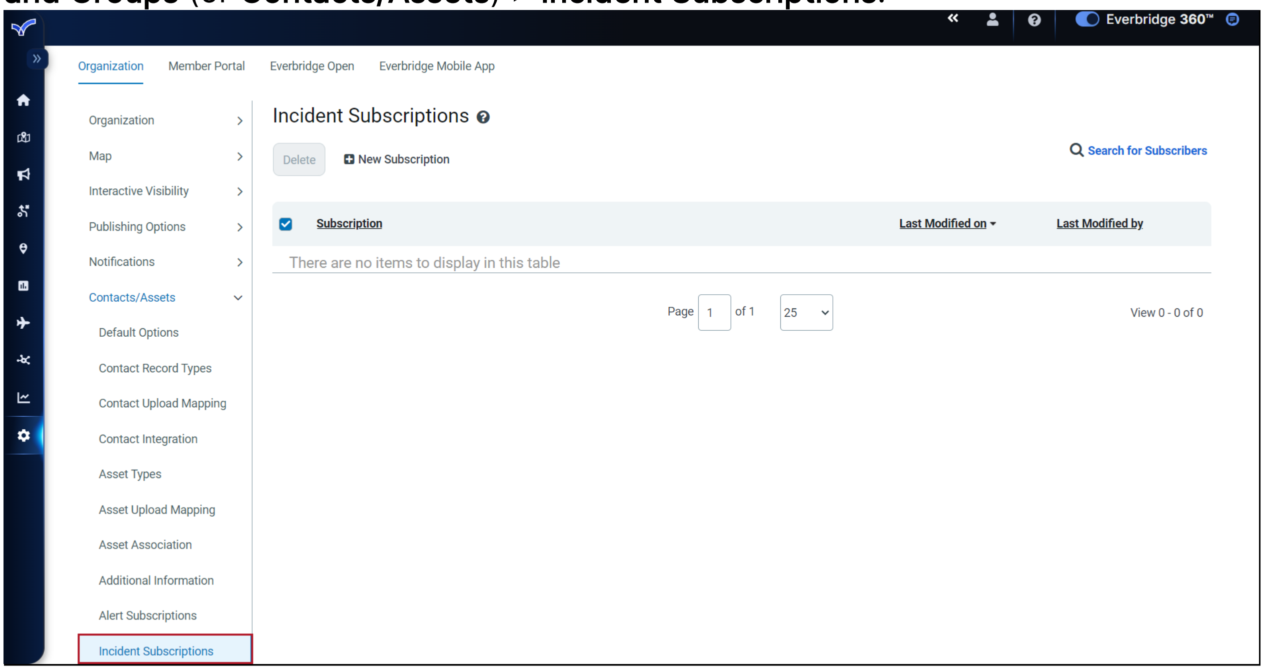
Remove Alert Subscription

To remove an Alert Subscription, click the **Trash Bin** from its row in the list. If you click the Trash Bin of a Category, all subscriptions are also removed. Or, click only the Trash Bin of the subscription to be removed.

Incident Subscriptions

Incident Subscriptions allow recipients (contacts) to proactively subscribe to Notifications related to issues and/or areas of interest to them. Incident Subscriptions are tied to the Incident Communications module and utilize Incident Variables as part of the selection criteria. A particular subscription with different preferences is a "combination."

Incident Subscriptions can be configured from **Settings** > **Organization** > **Contacts and Groups** (or **Contacts/Assets**) > **Incident Subscriptions**.



In a single subscription, you can create multiple combinations of Incident variables and subscribe individual contacts and/or groups to a specific combination. When an Incident is created, individuals who have opted-in to the specific combination criteria will receive a Notification.

You can optionally expose the Incident subscriptions to their Member Portal for self-service purposes.

Settings

About Subscriptions

You can create, view, and delete the Incident subscriptions from the Manager Portal.

To create a subscription:

1. Select **New Subscription** above the Subscription table.
2. Specify a name for your subscription.
3. Click **Save**.

After the subscription has been created, you can create a combination by specifying a mix of variables for the subscription.

About Combinations

The supported variable types are:

- TextBox
- Single selection
- Multiple selection
- Existing object name

Up to 10 unique variables can be in a single subscription.

- For a text box, select **Equal to**, **Contains**, or **Starts with**, then type the value you want to use. (For example, Starts with: Building.)
  - **AND/OR** does not apply to the TextBox variable.
- For a single selection variable, it is treated as a multiple selection variable.
- For a multiple selection variable, you can select one or more of the options.
- For an existing object name, select the values.

Inside one combination, the relationship between variables is “AND”, while inside one variable, it is “Or”. For example, if the member selects **Location = "Burlington, Pasadena”**, **Priority = P1**, **Services = Email**, then that user wants to receive the alert from Burlington, P1, and Email, or Pasadena, P1, and Email.

Between combinations, the relationship is **Or**.

The resulting users are the **exact match**. That is, if the user has specific preferences, that user will not receive the alert that occurs at Burlington without other attributes.

To create a new combination:

1. Choose **Select Variables**. This step is only required for the first combination; subsequent combinations will use the same variable set.
2. Select up to 10 Incident Variables from the list.
3. Click **Save**.
4. For each variable, specify the set of values or criteria you want to be notified about.

- The default value for a single selection or multi-selection variable is **Any**.
- You cannot create a combination with all variables set to **Any**. One variable in the combination must have a value selected.

5. Select the Subscription Type:
    - **Admin Managed** — a combination that the Administrator predefines and can publish to the Member Portal, allowing members to subscribe to them. The Administrator can also opt-in individual contacts and groups to the combination directly from the Manager Portal.
    - **Member Managed** — a template that the Administrator pre-sets and can publish to the Member Portal, allowing the members to create their own combination. The created combination is editable and can be deleted from the Member Portal. The Administrator cannot opt-in individual contacts and groups to the combination template from the Manager Portal.
6. Select the edit option for your combination:
    - **Make editable** — Any subscriber to the combination will be able to edit the list of values of each of the Incident variables from the Member Portal. **Make editable** is disabled for **Member Managed** combinations. However, all subscriptions created by a Member from the template are editable from the Member Portal.
    - **Restrict Member-selectable values to those chosen above** — When selected, when the Member edits a combination from the Member Portal, they can only select a variable from the pre-selected list of values set of the Administrator while creating the subscription combination. This option is only valid when the combination is editable.
7. Click **Add**.

In the Manager Portal, combinations appear at the bottom of the page. Click **Show Details** to display elements of the combination such as:

- If it was published to the Member Portal
- If it is editable or restricted
- Last Updated date and time
- The combination values.

Click **Hide Details** to view the Subscribers View link and the combined values.

At any time, Administrators can edit or delete combinations from a subscription. The Administrator can change the set of values or criteria for each variable, as well as the edit options. The subscription type cannot change after the combination is created.

The Administrator can edit combinations by the Administrator either from the **Subscription** page or a specific subscriber page.

- If edited from the **Subscription** page, the changes will apply to all subscribers.
- If edited from a specific subscriber page, the changes can be either applied to that subscriber or all subscribers.

About Subscribers

The Administrator can opt-in individuals or groups for a specific subscription combination. Subscribers will automatically be notified when an Incident is created and matches the conditions defined in the combination.

Members will also see the subscription combinations to which they are subscribed from the Member Portal.

To add a subscriber:

1. Select the subscription in the Subscription table to list the combinations.
2. In the **Subscriber** column, select **Add** or **View**.
3. In the **Manage Subscribers** dialog, search and select individuals or groups.
4. Click **Save**.

Publish to Member Portal

To manage the list of subscriptions visible by the members, publish them to the Member Portal. When published to the Member Portal, members can see the subscription combinations and select the ones they want to be notified about, or they can create their own combinations from previously created templates.

To publish a combination to the Member Portal:

1. Open your subscription from the Subscription table to access the list of combinations.
2. Select one or more combinations.
3. Select the **Publishing** menu.
4. Click **Publish to Member Portal**.

Remove from Member Portal

At any time, you can remove combinations from the Member Portal. However, they will still be visible to the members who are subscribed to them.

To remove a combination from the Member Portal:

1. Open your subscription from the Subscription table to access the list of combinations.
2. Select one or multiple combinations.

3. Select the **Publishing** menu.
4. Click **Remove from Member Portal**.

Restrict Visibility

By default, members of all groups will have access to the published combinations. You can limit which members can see a specific combination in the Member Portal based on the groups to which they belong.

To restrict the visibility of combinations in the Member Portal:

1. Click **Show Details** in the table header to display the **Published** column.
2. Select a published combination.
3. Click **All/Edit** in the **Published** column.
4. Select the group to which you want to give visibility to the combination.
5. Click **Save**.

Members outside the specified groups cannot see the published combinations in the Member Portal unless they are subscribers.

Click **Back to Subscriptions** to see your list of Incident subscriptions.

After your Incident subscriptions are created, in the **Contact** section of the Incident template, you can select the Sending Option: **Send to Incident subscribers** so that your Incident includes contacts in the template, as well as Incident subscribers set up in Settings.

Member Portal

The following are notes about the Public Member Portal and Private Member Portal:

- Subscriptions work for both the Public Member Portal and the Private Member Portal.
- Members can choose their Incident Subscription combination during the registration process.
- Members can opt in or opt out of any subscriptions.
  - After the member opts out of the combination, the combination remains displayed on the page, but the member no longer receives Notifications for that combination criteria.
  - The member can re-opt in at any time.
- Members can delete a subscription unless the Administrator published it to the Member Portal.
  - After the member deletes the subscription, it will be hidden from the Member Portal for that member only.

  - The subscription will not be deleted from the system unless there are no other subscribers.
- All subscription combinations to which the member is subscribed are displayed in the Member Portal.
- Members can create their own subscriptions if the subscription is a **Member Managed** subscription type.
  - Think of the subscription as a template. The member can create a subscription in the Member Portal from this template. Any subscription created by the member can be edited or deleted.
- Members can edit the subscriptions to which they are subscribed; if the subscription is a **Member Managed** subscription type, or if the subscription is an **Admin Managed** subscription type that the Administrator makes editable.
- A subscription combination subscribed to a group cannot be edited by the members.

In this example, the Administrator creates a combination. Select or clear a checkbox next to a combination name to opt in (subscribe) or opt out (unsubscribe). The member can edit the combination to which they opt in.

Groups

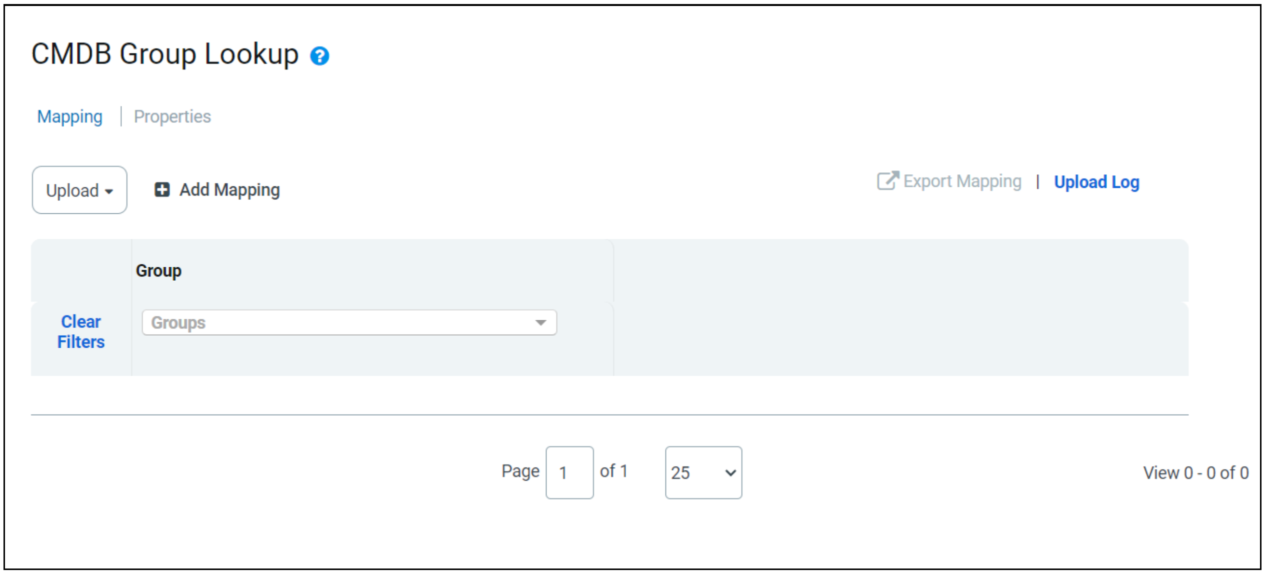
The **Groups** section is visible only if **Sequenced Groups** is enabled for your Organization. Sequenced Groups allow contacts to be put in a specific order in designated groups.

In the **Contacts** > **Groups** page, you can order the contacts of a specific group. When creating a Notification, you can select this group, turn on Sequencing in the Notification, and enter a wait time between contacts. Otherwise, leave Sequencing off to use it like a standard group.

> **NOTE:** The Sequenced Groups feature is available only if your Organization has **Incident Management** enabled.

CMDB Group Lookup

For use in Incident Templates, the **Configuration Management Database (CMDB) Group Lookup** feature automatically identifies the groups to notify based on selected Incident Information variables. Administrators can find this page at the Organization level from **Settings** > **Organization** > **Contacts/Assets** > **CMDB Group Lookup**.



To begin, first define a set of properties and their values, then create a mapping between groups and their properties or values.

When configured in an Incident Template, the group defined in the mapping is automatically targeted when the combination of properties and values matches. Each property is an **AND** operation, and each value in a property is an **OR** operation.

For information about how to use this feature in Incident Templates, read the Adding Information Variables, Form and Message, and Using Incident Rules sections of this guide.

Properties

Per group, you can define up to 15 properties, and each property can have a maximum of 15,000 values. Each property and value name can be up to 260 characters.

You can create properties manually, in a CSV upload, or via the public REST API.

Create properties manually

To create properties manually:

1. From the **CMDB Lookup** page, click **Properties**. The list of properties and their values appears.
2. Enter a property name. Property names are case insensitive and must be unique.
3. Enter the property's corresponding values and press ENTER between each value. Property values are case insensitive.
4. Optionally, to delete an existing property, click the Trash Bin next to its name and click **Yes** to confirm the deletion.

Edit properties manually

To edit properties manually:

1. Click the **Pencil** icon of the property.
2. Change the property name and property values, as needed.
    - Property names and values are case insensitive and must be unique.
3. Click **Save**.

> **NOTE:** If you change a property's name and that property is mapped to an **Existing Object Name** Incident variable, you must also update the **Existing Object Name** Incident variable.

Delete properties manually

To delete properties:

1. Click the **Trash Bin** of the desired property that you want to delete.
2. Click **Yes** to confirm the deletion.

> **NOTE:** If you delete a property that is used in an Incident rule, you must update that rule and any **Existing Object Name** Incident variables that use the property.

Add properties via a CSV file

To add properties and their values via a CSV file:

1. Navigate to the **Properties** tab and click **Upload**. A pop-up window appears.

2. In the pop-up window, click **Download Template** to download a template specific to properties. The file name will be `cmdb-properties-ORGID.csv`, where `ORGID` represents the Organization's ID.
    - Alternatively, you can use a blank spreadsheet and add each property as a column and each value as a row.
3. Replace the **Property** column headings in row 1 with your actual property names.
    - If you do not use all 15 properties, leave the unused properties blank, or remove the columns from the template.
4. Save the template with a unique CSV name.
5. After filling in the spreadsheet, click **Upload**, and then click **Upload** in the pop-up window that appears.
6. Select or drag and drop the CSV file and click **Upload.**
7. Scroll to the right to view all of the properties.

Upon upload, new properties and their values will be added. Values of existing properties will be updated as defined in the CSV. New values will be added and existing values that are not in the file will be removed.

If a property is used in an Incident rule, when values are updated, the rule is not affected.

There cannot be more than 15 properties, with each having up to 15,000 values. This means:

- If more than 15 properties are listed in the file, the import will fail.
- If a file contains duplicate properties, the import will fail.
- If the file includes more than 15,000 values for a specific property, that property will not upload, but the others will upload.
- If a file includes properties with improper characters for either name or values, that property creation will fail. However, the full import will succeed.

To view import logs and failures, click **Upload Log.**

NOTE: You cannot delete properties using CSV upload. if an existing property is not listed in the CSV file, it is ignored during the upload and remains unchanged. You can only delete properties manually.

Export existing properties and their values in a CV file

To export existing properties and their values in a CSV file, navigate to the **Properties** tab and click **Export Properties**.

You can export all existing properties to a CSV file named **cmdb-properties-ORGID.csv**, where ORGID represents the Organization's ID. You can use this file to upload changes to your properties. Each property appears in a separate column, with one row for each value.

Display upload history

To display the upload history:

1. Navigate to the **Properties** tab.
2. Click **Upload Log**. The status of the Organization's CSV uploads appears.
3. Click the View icon from the desired name to see the error log details.
4. Click **Back to Upload Log** to return to the **Upload Log** page.

Mappings

There are two methods to add mappings.

- Upload a CSV file of groups and their mappings.
  - When uploading mappings via a CSV file, you can also create properties and add values.
- Manually add a group and its mapping.

The groups must exist in your Organization. Per group, you can have up to 15 properties with a maximum of 15,000 values. Each property is an **AND** operation, and each value in a property is an **OR** operation.

> **NOTE:** There is no limitation on the number of rows being uploaded as long as the CSV file does not exceed 12 MB.

Upload via CSV file

To add a batch of groups and their mappings via a CSV file:

1. From **Upload**, download a template specific to CMDB Group Lookup, **cmdb_ORGID.csv**, where ORGIID represents the Organization ID.
   - You can also use a blank spreadsheet, and add your groups in Column 1 and each property as an additional column.
   - The heading of Column 1 must be **Group**.
2. Replace the **Property** column headings in row 1 with your actual property names.
   - If you already created properties, they will be listed in the template. You can add new properties as needed.

- If you do not use all 15 properties, leave the unused properties blank or remove the column(s) from the template.

3. As needed, fill in each row with group names and their corresponding properties.
4. Separate group names and property values using the pipe (|) character. Do not add any spaces before and after the pipe character.
5. Save the template with a unique CSV name.
6. Select **Upload** to upload a batch of groups into your **CMDB Group Lookup** table.
7. Select or drag and drop your CSV file and click **Upload**.
8. Scroll to the right to see all the properties, if needed.
9. Resize each column in the table. To do this, hover the mouse on the line in-between two columns, hold down the mouse button, and resize. Release the mouse button when you can see all values in the properties.
10. Proceed to **Properties** to filter each column.

Upload options

When uploading a mapping for the first time or during subsequent uploads, you are presented with three options:

Option	Description
Create/Update	• Add new properties, new values to existing properties, and new mappings. • Will not change any existing mappings. • Will not impact any existing Incident rules or Existing Object Name Incident variables that use your properties.
Override Mapping	• Add new properties, new values to existing properties, and new mappings. • Will delete all existing mappings and create a new one according to the file. • Will not delete any properties and will not impact any Incident rules or Existing Object Name Incident variables that use your properties.
Override Everything	• Replace all existing properties and mappings with new ones. • Will delete all existing properties and all existing mappings and create new ones from the file. ◦ All Incident rules using those properties will need to be updated. • Will not impact Existing Object Name Incident variables that use your properties as long as the new property names still match.

You cannot use these options to remove a property value. To remove unused property values, upload your properties from the **Properties** tab.

Manually Add Mappings

To manually add a group and its mappings:

1. Click **Add Mapping** to manually add an existing group and up to 15 properties and their corresponding values to each property.
2. From the **CMDB Group Lookup** page, click **Add Mapping**.
3. Select a group name from the **Group** menu.
4. For each property, select the values from the corresponding drop-down list. You can select all the values in the list, if needed.
5. Click **Save**. In the table, hover the mouse over a cell of multiple values to see all of them at once.

Edit Mappings

To edit group mappings:

1. Click the Pencil icon of the group.
2. Change the group filters, as needed.
    a. To remove an existing filter, click **X**.
    b. To add a filter, click the Down arrow and select the filter name.
3. Click **Save**. Optionally, click the Cancel icon to cancel the operation.

Delete Mappings

To delete group mapping:

1. Click the **Trash Bin** of the desired group name that you want to delete.
2. Click **Yes** to confirm the deletion.

> **NOTE:** Deleting a group mapping does not update the properties.

Retrieve Existing CMDB Group Lookup table

To get a list of the existing CMDB Group Lookup table, from the **CMDB Group Lookup** page, click **Export Mapping**. A CSV file is generated.

You can do any of the following in the file:

- Update the CSV file, as needed. You can enter multiple values separated with a pipe (|) character.

- Save the file and upload it to the desired Organization.

Display upload history

To display the upload history:

1. From the **CMDB Group Lookup** page, click **Upload Log.** The status of the CSV uploads for this Organization appears.
2. Select the **View** icon from the desired name to see the error log details.
3. Click **Back to Upload Log** to return to the **Upload Log** page.

Introduction to Contacts

From the **Contacts** tab, to view a contact record, click the name. All of the information for the selected contact is displayed. Click **Contacts** in the upper left-hand corner of the page to return to the **Contacts** list.

To edit a Contact Record, click the Pencil icon in the specified row. The fields are enabled so that you can change the information. Click **Save** when you are done.

To delete a Contact Record, select the contact's checkbox, then click **Delete**. Confirm the deletion. Or, from the **Update Contact** page, click **Delete**.

To add contacts to one or more existing groups, select one or more checkboxes of the contacts, then click **Add to Groups**. Select one or more checkboxes of the group names, and click **Add to Groups**.

NOTE: For in-depth instructions on managing contacts, such as adding, uploading, or editing, see the *Everbridge Suite User Guide*.

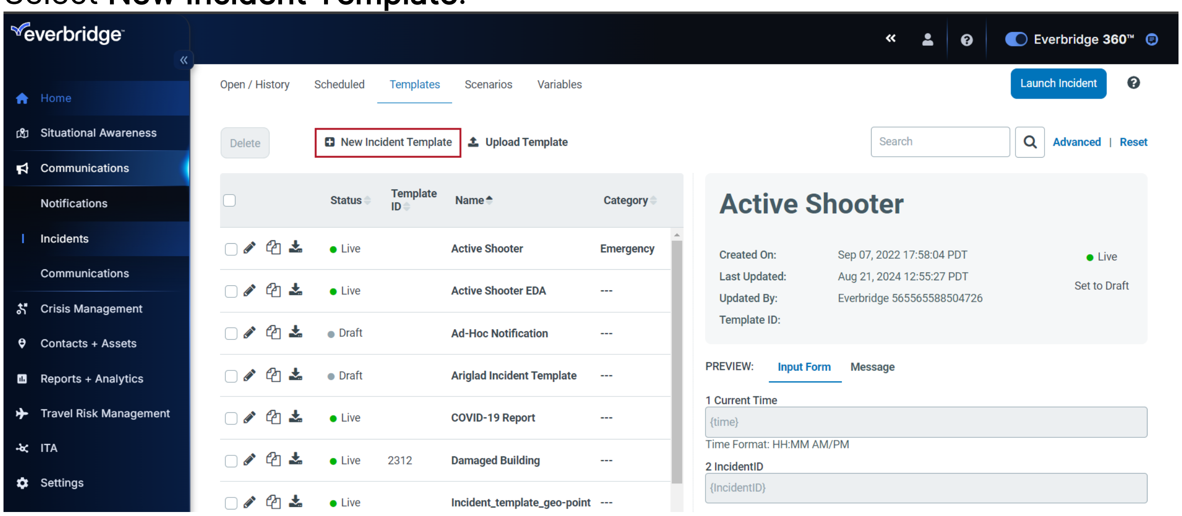
Creating Incident Templates

New Incident templates can include several variable information fields or be fairly minimal depending on a situation's specific requirements. A new template does not need to be completed all at once and can be saved to finish later.

> **NOTE:** See this article in the Everbridge Support Center for information on how to create different Incident templates depending on your situation. It offers guidance on how to create Incident templates for some example scenarios: a tornado warning, workplace violence threat, cyber attack, hazardous chemical spill, public health warning, and so on.

To create an Incident template:

1. Select **Communications** > **Incidents** > **Templates**.
2. Select **New Incident Template**.

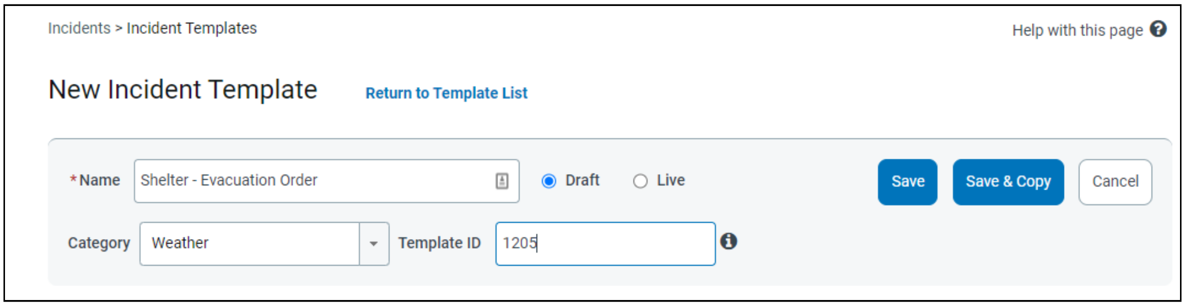


Note that while you are working on the template, it's in a **Draft** state (offline and unavailable to operators). When you are ready to have the template available to operators, change the template to **Live**.

> **TIP:** You can also download a template from one Organization to another if you don't want to create a new Incident template from scratch. See Downloading and Uploading Incident Templates.

3. In **Name**, you must type the name of the template. Using numbers in your template name is a useful way to sort them so your operators know the order in which to launch Incidents.

4. Optionally, provide a category (or folder) name for the template. Categories are a way for the operators to quickly find related Incident types in one location.
5. Optionally, specify a **Template ID**, if you have enabled and plan to use the **Launch by Phone** capability. A **Template ID** must be a maximum of 20 digits and cannot start with zero (0). (This allows you to launch your Notification by phone when you have no access to the Internet or Wi-Fi.)
6. Optionally, from **ITA Process**, select an ITA process from the drop-down list If you want your Incident to be a part of IT Alerting. See the *ITA Alerting Guide* for more details.



7. Add your information variables. See Adding Information Variables for more on how to create them.
8. From **Form & Message,** configure your operator form and the message you want your recipients to receive. See Defining Form & Message.
9. From **Publishing Options**, see Publishing Options.
10. From **Contacts**, see Contacts.
11. From **Settings**, see Configuring Incident Template Settings.
12. From **Permissions**, see Setting Incident Templates Operator Permissions.

Adding Information Variables

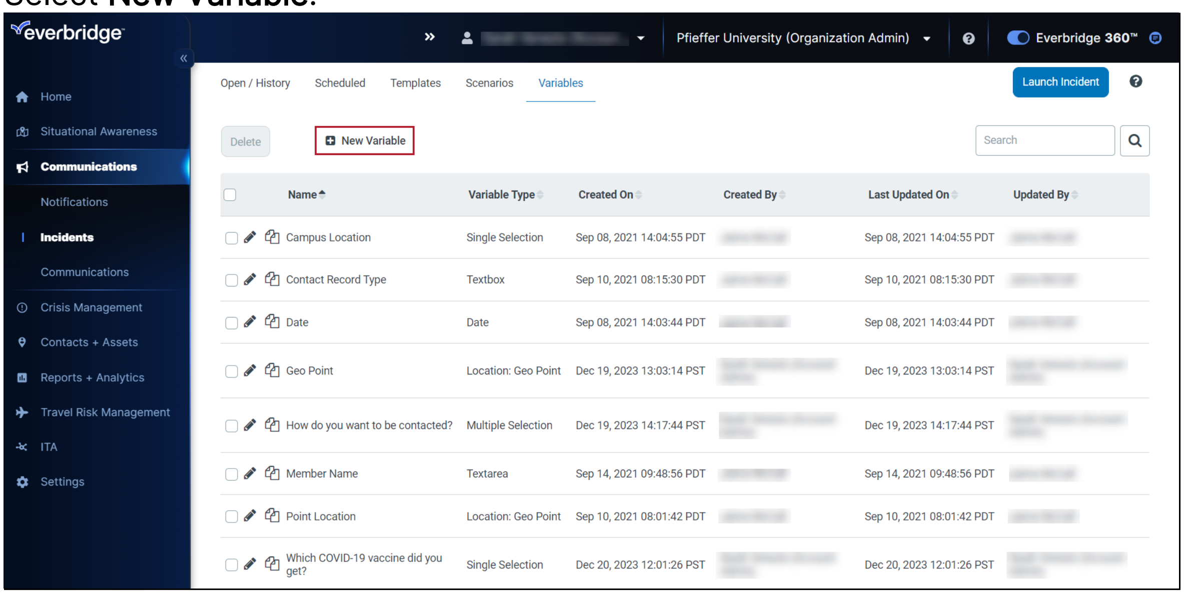
An information variable is a custom field that administrators (Incident Administrators, Organization Administrators, and Account Administrators) can add to the Operator Form on an Incident template.

You can add information variables for your Incident templates to collect critical facts about the Incident. The facts can change during the life cycle of the Incident as the information is verified and refined by the message recipients.

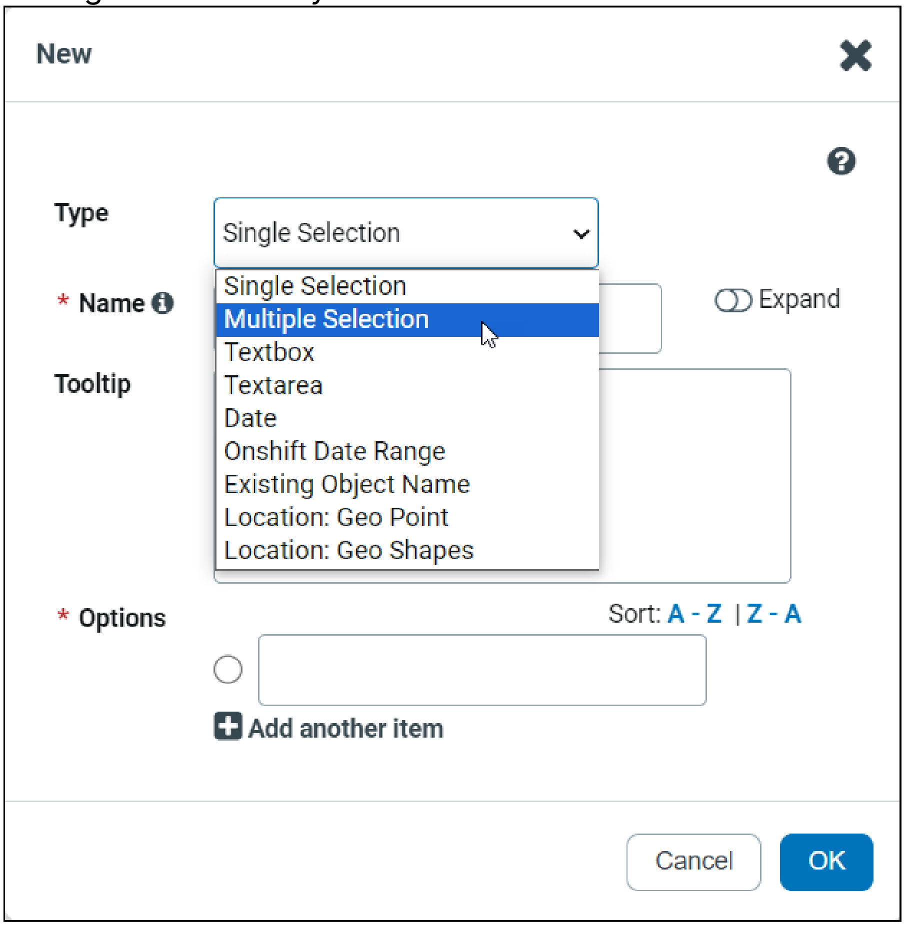
As you create your template, you can test the template to ensure that the information in the template is what you expect. You can always add more information variables as you develop your Incident template.

To add information variables:

1. Select **Incidents** > **Variables**. A blank list is displayed if there are no existing information variables. Otherwise, the list of existing information variables is displayed.
2. Select **New Variable**.



3. Configure the fields you want.



Field or Area	Description
Variable Type	Indicates the format for the variable. Each field can only have one variable type. There are five formats from which to choose: • **Single Selection** - A list of values from which the operator chooses one option from this list. • **Multiple Selection** - A list of values from which the operator can choose one, more than one, or all the options in the list. This is used when an operator needs to choose more than one location, event or action to take. When building your variable consider if there are circumstances where selecting more than one option from the list may be necessary. • **Textbox** - A short free-form text field. The operator can assign the maximum size value for the textbox: 1-399 characters of text (numbers, letters, and keyboard characters).

- **Textarea** - A larger free-form text field. Select the number of characters in the text area then enter any alphanumeric string. Can be configured to hold up to 50,000 characters.

  Textbox and **Textarea** variable types cannot be used to create Incident rules or conditions.
- **Date** - A date-formatted field.

  Besides the date format options, you can also select a 24-hour clock or a 12-hour clock.
    - MM-DD-YYYY HH:MM:SS
    - MM-DD-YYYY (Default)
    - MM-DD-YYYY HH:MM
    - DD-MM-YYYY
    - DD-MM-YYYY HH:MM:SS
    - DD-MM-YYYY HH:MM
    - YYYY-MM-DD
    - YYYY-MM-DD HH:MM:SS
    - YYYY-MM-DD HH:MM
- **Onshift Date Range** - An on-shift time range field. In the Incident rule, enter the date and time using the format:

  Besides the date format options, you can also select a 24-hour clock (default) or a 12-hour clock.
    - MM-DD-YYYY HH:MM
    - DD-MM-YYYY HH:MM
    - YYYY-MM-DD HH:MM.
- **Existing Object Name** - An operator chooses to get a value from a calendar or a group, including Configuration Management Database Group (CMDB) Lookup Properties.
    - When you select Calendars or Groups, you can either select:
        - **Subset** to select existing calendars or groups.
        - **Filter** to enter **Starts with** criteria.
    - When you use the CMDB groups under Group lookup properties, select which CMDB Group lookup property to get the values from.
- **Location: Geo Point** - Whenever you add a **Location: Geo Point** variable token, it includes two separate tokens:
    - **Plain Text Address**. The plain text token is named {[*Variable Name*]|Address}
    - **Latitude/Longitude**. The **Latitude/Longitude** token is named {[*Variable Name*]}.

<table>
<tr><td></td><td>Both tokens are added to the form in the following order: {[Variable Name]} {[Variable Name]|Address}
▪ Optionally, select Make the address field required whenever the variable is required.
• Location: Geo Shapes - Allows your operator to use shapes for the contact selection. If configured, an operator can draw a shape or select a shape from the Organization Shape Library. The operator can use this variable to send a geo-targeted Notification for all the contacts with static addresses in the area. You must configure your template with the appropriate Incident Rule that references this variable. You can assign a description to this variable, which is used for the variable’s token value. Currently, the variable can support up to 100 shapes and each shape can have 5,000 or fewer vertices. You are alerted if these requirements are not met. The requirements apply to both manually-drawn shapes, and selected shapes from the Shape Library.</td></tr>
<tr><td>Name</td><td>The name of the information variable. This is the name your operators see when they launch an Incident. Variable names cannot be longer than 1,000 characters and can contain letters, numbers, and special characters. During new creation or editing, the name must not start with underscore (_), $, or @ and cannot include the Pipe character (|). The list is displayed in alphabetical order.</td></tr>
<tr><td>Tooltip</td><td>Use the tooltip text to provide instructions to your operators on how to use the field. If you enter anything in this field, the operator sees an information icon next to the field on the Operator Form.</td></tr>
<tr><td>Options</td><td>For Single-Selection and Multiple-Selection types, this is the list of values the operator can select. There is no limit to the number of options you can enter; however, it is recommended you keep this list short.
Select the check box or radio button if you want the option to be a default value.</td></tr>
<tr><td>Sort: A-Z | Z-A</td><td>Optionally, select the sort order that operators select when using this variable in the template.</td></tr>
<tr><td>Add another item</td><td>Click this link to add more options, as needed.</td></tr>
</table>

4. Click **OK**.

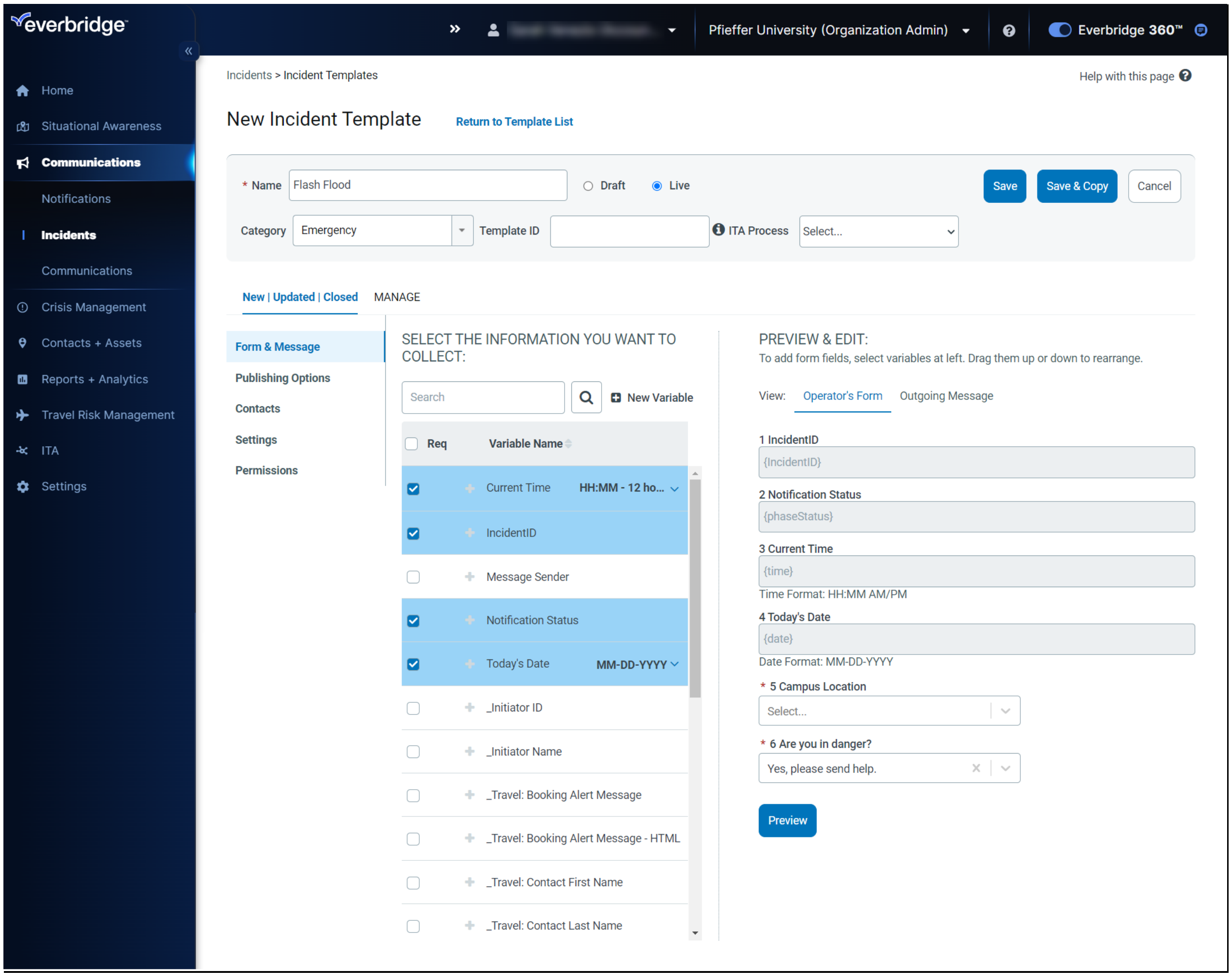
5. Repeat Steps 2 through 4 for each additional variable you want to add.
6. To edit an existing variable, select the **Pencil** icon beside the variable you want to edit.
7. To copy an existing variable, select **Copy** beside the variable you want to copy.
8. To delete a variable, select the variable you want to delete and select **Delete**. You can select more than one variable at a time.
9. To delete all the variables from the table, select the check box in the column heading and select **Delete**.
10. **NOTE:** When you delete a variable associated with a template, the variable is removed from the templates. If the variable is used for Incident subscriptions, make sure to update them.

Defining Form & Message

When a template is sent it becomes an Incident Notification. If more than one Incident Notification is sent under the same event, they are collectively called an Incident. For example, you can launch an Incident Notification to communicate to your contacts that they should go to a place of safety. The **Form & Message** guide the content and structure of the Incident Notification. It allows you to indicate the information you want your operator to collect when launching an Incident, using predefined information variables. You can also add a new variable.

- Using information variables, configure the information you want an operator to provide when an Incident is launched.
- In operator form, configure how you want the form to display to your operator when launching a new Incident.
- In an outgoing message, configure the message that your contacts will see when they receive the Incident Notification.

The left-hand pane contains the list of variables and the right-hand pane contains a sample of the operator input form and the outgoing message template. The existing information variables for your Organization are listed by name.



- Application-provided variables are displayed at the top of the **Variable Name** column.
- Client-defined variables are alphabetically listed after the application-provided variables.
- You can have as many variables as you need for your Organization's communication plan. To manage the information variables for the Organization, see Adding Information Variables.

Operator's Form

To define the **Operator's Form** section of the **Form & Message**:

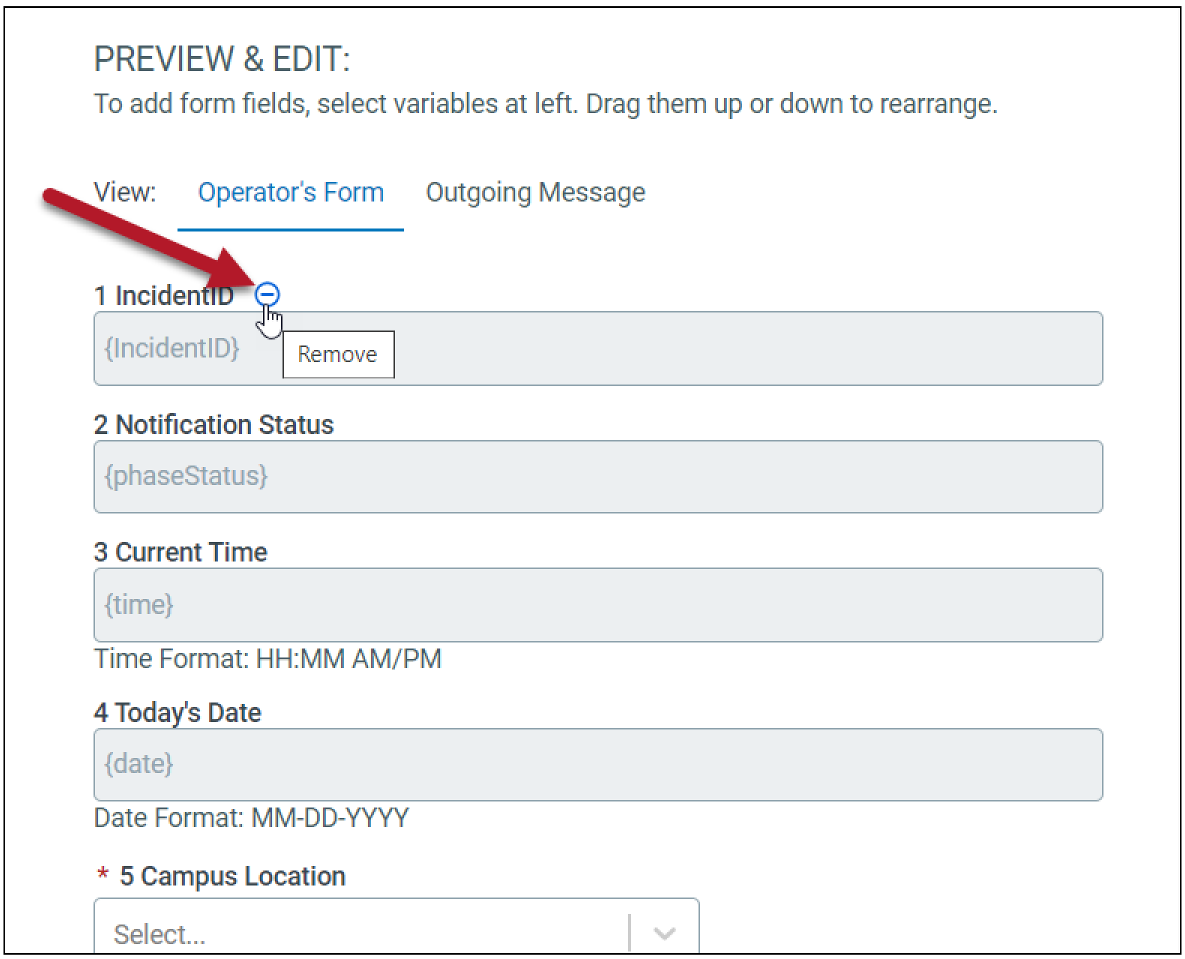
1. Scroll and/or use **Search** to locate the information variables you want. The search feature uses the **contains** condition. For example, to find all Incidents with the name **Office**, type the full word or the partial word, **Office** or **off**. When you click **Search**, the application finds all variables whose names include **Office** or **off**.
2. From the list of variables, select the first checkboxes of the variables you want.

- The fields are displayed on the **Operator's Form** subtab of the **Preview & Edit** pane.
- A number before each variable name denotes the placement of the variable, from top-to-bottom, on the **Operator Form**. The numbers enable you to quickly assess how many fields you have placed on the form. Secondly, operators can quickly assess the number of fields to fill in.

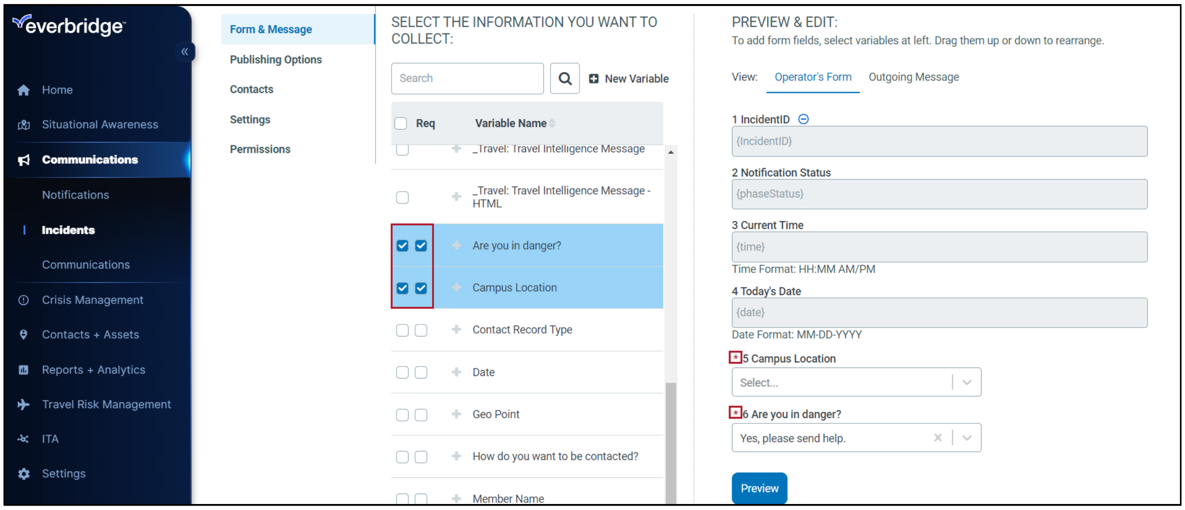
  TIP: To make the form quicker to fill in, keep the list of variables to essential information only.

- If you are using CMDB mapping, you must include all variables needed to target groups based on the CMDB mapping. For more information about CMDB mapping, read the CMDB Group Lookup section.

3. To change the order of the variables in your operator form, drag and drop the variables in the **Preview & Edit** pane.
4. To remove a variable, from the **Preview & Edit** pane, hover the mouse over the variable then click **Remove.**



5. If the variable is a required field, select the checkbox under the **Req** column corresponding to the variable name. A required field is marked with a red asterisk (*) and, when launching an Incident, must be completed before the operator advances to the next stage.



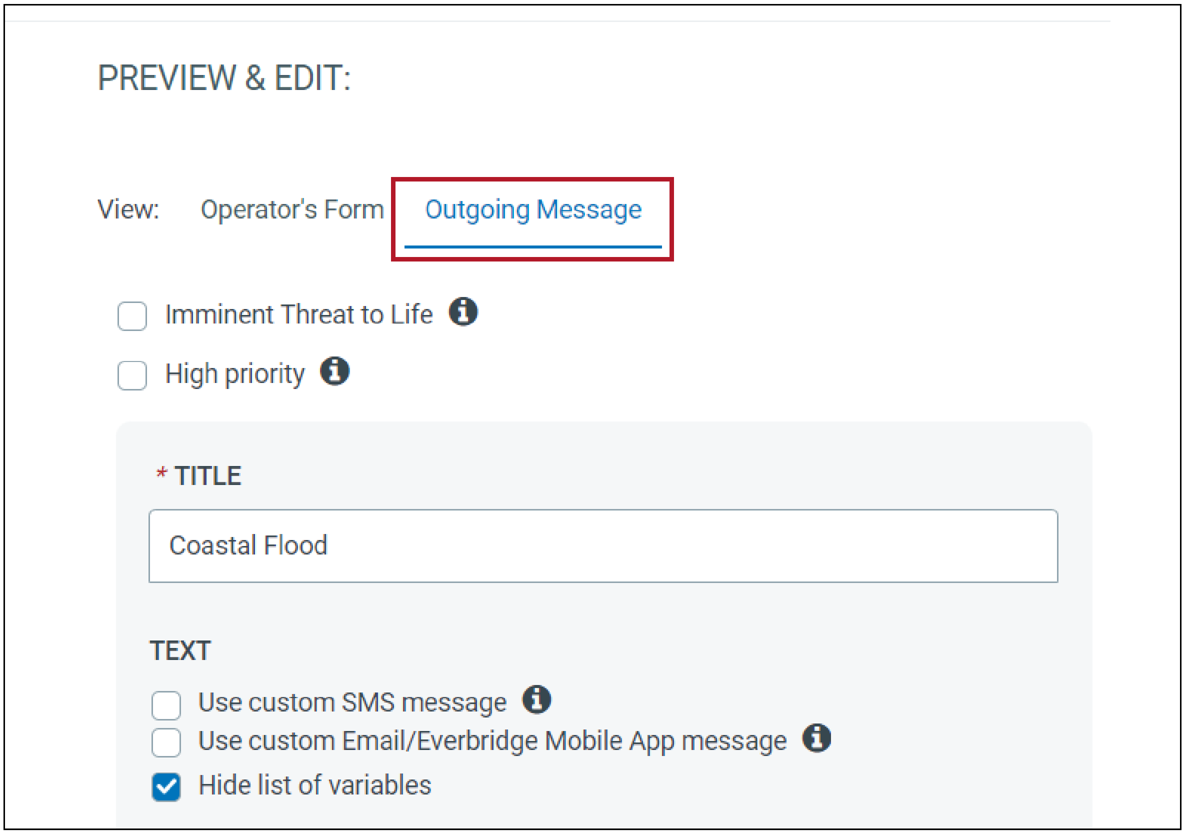
NOTE: The application-provided variables are always required because the application automatically inserts a value. The operators cannot edit the values before sending the Notification.

6. Click **Preview** to preview the order and values of your variables. If you save the template with any values for the information variables, then those values become the default values.
7. Click **OK** to return to the Operator Form.

Outgoing Message

Once the Operator's Form has been built, it's time to create the Outgoing Message. To do so:

1. From the **Preview & Edit** section, select **Outgoing Message**.



2. Optionally, select **Imminent Threat to Life**
    - **Imminent Threat to Life** means the event, Incident or emergency:
        - Has just occurred (for example, an earthquake, volcanic eruption, or failed life-support system)
        - Is in-progress (for example, an active shooter or nuclear power plant emergency), or
        - Is expected to happen today (for example, severe weather).
        - The life or safety of message recipients are immediately at risk.
        - Examples:
            - Active Shooter event in the recipient's location
            - Life-threatening weather event that will impact recipients in the affected geographical region.
    - Messages not considered **Imminent Threat to Life**:
        - Notifications to recipients to inform them of an active shooter at another location, a weather event that will impact a different location or a weather event that is still days away.
        - Notifications sent after the initial ITL message UNLESS there is a material change from the initial Notification AND the change results in an increased immediate risk to life and safety.
        - Notifications sent to recipients that are not at risk for life and safety regardless of the type of Incident.

3. Optionally, select **High priority**, for example, if this is an emergency situation. (Leave the checkbox clear if this is a low priority, or standard message.) High-priority Notifications are placed higher in the outbound queue before any non-priority Notifications. In addition, high priority messages include an important (!) flag in your inbox when sent via email and use the high priority voice greeting at the start of phone calls instead of the default voice greeting.
4. In **Title**, type a title for this Incident (up to 255 characters). For example, **Cyber Attack**. If this message is sent to all delivery methods (such as email, fax, pager, and SMS), the title becomes the subject line of the message. The SMS message is truncated after the exceeded limit. See Using Information Variable Tokens.
5. You can use the same text for all your delivery methods or you can choose to have separate text for SMS, fax, pager, text-to-speech and email. Everbridge recommends you always send custom messages per delivery method, if possible. This helps to avoid message fatigue and enables contacts to consume messages in the most efficient way possible, per device. Across all delivery methods, Everbridge recommends starting with the source (your Organization), including a call to action and description of the hazard that references where they can find additional details, although the style and length of each message varies by delivery method. In **Text**:
    - Select **Use custom SMS messages**. By default, the same text is used for SMS, fax, pager and text-to-speech. If you want to use a separate SMS message from fax, pager and text-to-speech, select **Use custom SMS Message**. Text is limited to 160 GSM characters or 70 non-GSM characters. Everbridge recommends keeping a message under 100 characters, including **Title** (if enabled in SMS) and confirmation instructions. See Using a Custom SMS Message and the following Knowledge Base articles in the Everbridge Support Center:
        - Can Non-GSM or Unicode Characters Be Used When Creating an SMS Notification in Everbridge Suite?
        - Custom SMS Messages Longer than 160 Characters (or 70 characters if UCS Encoding) are Missing a Link to the Full Text Message
        - Everbridge SmartPath: Single SMS
    - Select **Use custom Email/Everbridge Mobile App message** to create a custom message for your email delivery method. For example, you may want to include a link to another resource that a contact can look at for more information. You can either copy and paste items from an external source, such as a website or Microsoft Word or external editors or type your message directly into the **Email, Everbridge Mobile App** pane. You can customize the email with text formatting features such as images, color, tables, and so forth. You can insert **Information Variable** tokens in

your custom email content. The custom email is delivered to Everbridge Mobile App users as an attachment.
    - If an existing template had a custom message created from the earlier Rich Text Format (RTF) editor, you can choose to continue to use that editor. Select **...** (ellipsis) to open the **Custom Email** window and work.
    - Or, you can select the **Clear Contents** link to clear the custom message from the earlier RTF editor.
    - Alternatively, select the link: **Switch to New Text Editor**. Switching text editors might change the display style of the existing message. Review your message to ensure its accuracy. When the template is saved, your message is saved in the RTF editor you last used.
- Select **Hide the list of variables**, if you do not want to see the list of variables you have configured for this Incident to be displayed in your message. For example, if you are sending an Incident Notification to employees, it might be better to hide the list of variables and use a message. However, if you are working with a response team that is used to seeing what is going on as a quick list, you can clear **Hide list of variables** and those recipients can view the information as a list instead.

6. Type your text. See Using Information Variable Tokens.
7. From **Speech**, select one of the following options:
    - **Text-to-speech**. Select this if you want to convert the text of your message into speech for delivery methods with audio. This converts text entered in the message body into an audio file for use with any phone delivery method. The language of the **Text-to-Speech** preview is the language selected as the default language, or the language selected in **Settings** of the Notification form. Select the speaker icon to hear the recording. (Separate email content is not utilized for Text-to-Speech.)
    - **Use a voice recording**. Select this to add a recording of a trusted voice. You can choose to:
        - **Use Everbridge recorder**. Select **Start** to record your message using your computer microphone. Everbridge recommends you keep a voice recording to between 30-45 seconds and never more than a minute, although the maximum for recordings is 5 minutes in length.
        - **Use a telephone**. Select **Recording Instructions** and follow the instructions provided by your Organization Administrator. If you are using a poll, set up your poll first, then record to allow for poll responses over the phone.
        - **Upload a file**. Select **Upload a file** to upload a prerecorded file. The recommended format is 8KHz, 8-bit mono u-law or uncompressed PCM WAV, and less than 5 minutes in length.)

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

Everbridge can also convert the following file formats:

- 8K Hz 8-bit PCM
- 8K Hz 16-bit PCM
- 8K Hz 4-bit ADPCM
- 8K Hz GSM 06.108K Hz mu-Law
- 11K Hz 8-bit PCM
- 11K Hz 16-bit PCM
- 11K Hz 4-bit ADPCM
- 11K Hz GSM 06.10
- 11k Hz mu-Law

8. Select a **Message Type**.
   - **Standard** - A **Standard** message is simply a Notification of the message.
   - **Polling** - In **Text Response**, add the answer options to the poll question in your message. You can add more than one response but contacts can only select one. You will see the chosen responses in **Broadcast Results**.

   > **NOTE:** For your **Polling** message type, in **Settings**, the **Voice Mail Preference** and **Confirm** panes are replaced with the **SMS Call Back** pane. In this pane, when the **SMS Call Back** checkbox is selected, the SMS recipients are provided with a number to call and make their polling selection. If the **SMS Call Back** checkbox is clear, the SMS recipients are presented with a menu to select their polling choice directly from the device.

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

   Select **Use Quotas** if you want to compare the number of desired responses for each Polling option against actual responses.

     - The Voice platform connects the call.
     - The Voice platform detects a human (recipient answers the phone).
     - The application prompts the user to select an option.
     - The application plays an audio file of the polling options.
     - The application plays the prompt, “To replay this message, press Star”.

    - The recipient presses the Star key and the message and options are replayed.
    - Alternate path: The recipient does not press a key, pausing 3 or 4 seconds after listening to the polling options; the application assumes it has been interacting with voice mail and leaves a greeting, a callback phone number, and message ID.
  - **Conference Bridge** - In a conference Notification, the message invites a contact to join a conference call. This could be an emergency where contacts need to discuss the situation immediately. Or, it might be a convenient way to pull everyone together for the weekly status meeting. Contacts who are reached by phone can push a button to connect to the conference bridge. Contacts who receive a text message see instructions for joining the call. See Using Conference Bridges.
9. Select **Attach Files** to attach up to 5 files, as needed, to the message. The maximum file size is 20 MB. If the total size of the attached files is more than 2 MB, a link is included in the Notification. Each filename should be no more than 80 characters. You can attach files if the Notification is to be sent via email, Everbridge, or fax.

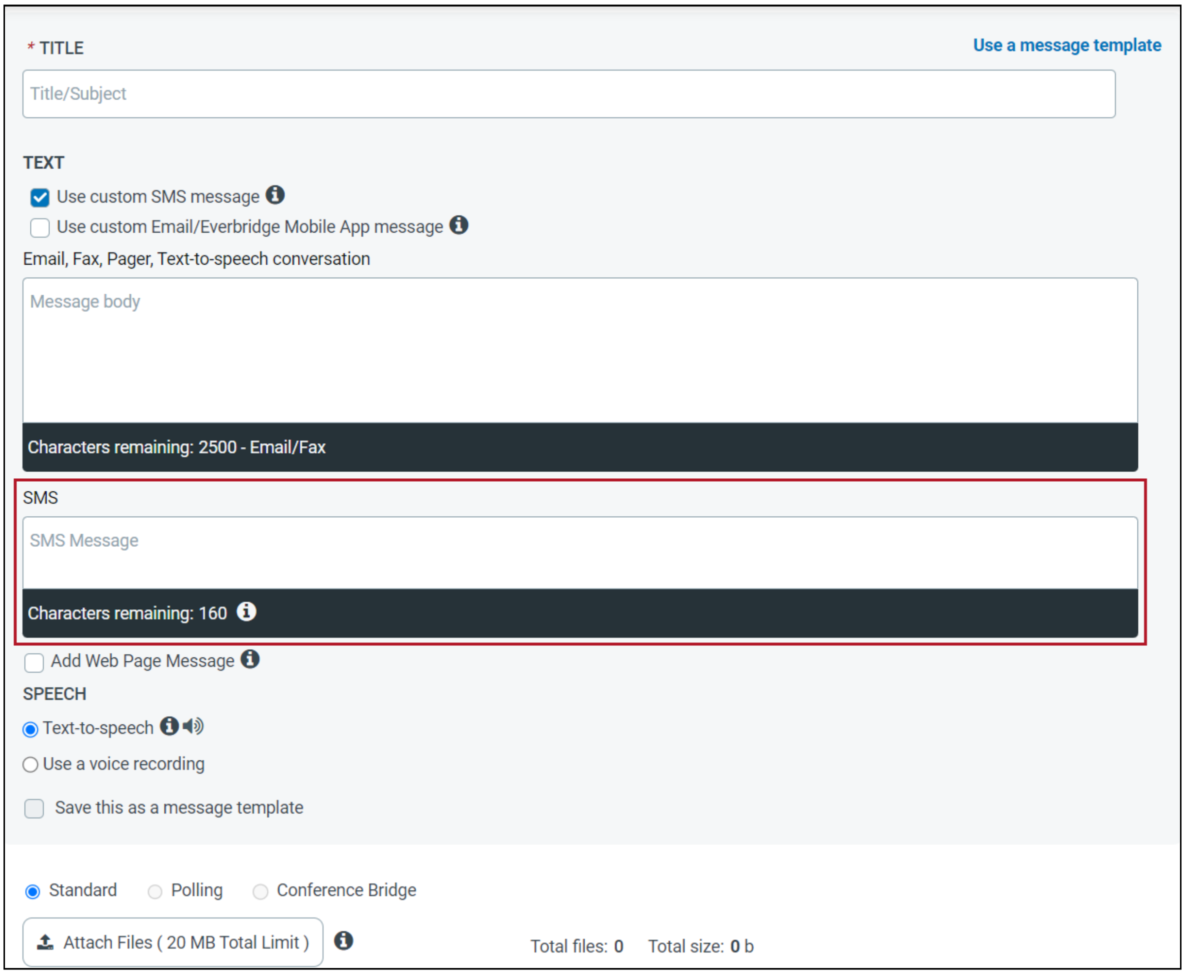
   If the Notification is to be sent via fax, then ensure you are using file types that are receivable via a fax transmission (for example, no audio files). Fax attachment files should not contain macros or complicated formatting; Everbridge Suite accepts 178 different document types including the more commonly used formats such as Microsoft Word, Microsoft Excel, PDF, and HTML.
10. If publishing to Community Engagement or Visitor Engagement keywords, from the **Event Subscriptions** pane, select the event to be included in the Notification. Events are set up in **Settings** > **Contacts and Groups** > **Event Subscriptions**. See Publishing Options
11. Optionally, to add a publishing option condition, see Publishing Options Conditions.

Use Custom SMS Messages

When sending a Notification, select the **Use Custom SMS message** checkbox to display a separate text field for your SMS message.

To use a custom SMS message:

1. From the **New Notification** page, select **Use Custom SMS message**. A separate SMS text box appears.



2. If your Organization has enabled a Message Prefix, set the **Message Prefix** toggle to On. You immediately see the prefix appear as the first item in your SMS message. Note that the prefix is set by your Organization and the number of characters counts against the 160-character limit.
3. Type your SMS message, up to 160 characters.
4. Optionally, select **Add Web Page Message**. A link will be added to the end of your SMS to view your Web Page message. Type and format your Web Page message.
5. Continue activities to send your Notification.

6. After the Notification is sent, review the Notification Details.
7. Optionally, you can download the Detailed Notification Analysis Report and/or download the zip folder that includes a Comma-Separated Values (CSV) file of contacts sent the Notification, the Notification details, Notification attachments, voice files, and shape files.

Using Information Variable Tokens

You can insert a token for an information variable into the **Title** and **Body** fields of your message. When an operator completes a field in the operator form, the token is replaced with the value entered or selected by the operator.

The token format is {*information variable name*} For example, if your information variable is named **Building Name**, then the token would be {Building Name}. Tokens are text strings that can be manipulated like text.

There are three ways to insert an information variable token in the Outgoing Message:

1. Manually enter the token name into the desired text file.
2. Use the "+" symbol next to the information variable name to auto-insert the token string.
3. Activate the included variables list view panel by entering the "{" character in message/publishing options text fields, filter the list for the entered characters, and quickly select the desired variable token from the panel. You can only insert tokens for information variables you include on your Operator Form or if they are system variables. There are the following system variables.

System Variable	Description
Current Time	{time} Select HH:MM:SS or HH:MM.
IncidentID	{IncidentID}
Message Sender	{username}
Notification Status	{phaseStatus}
Smart Channel	The variable will allow the Incident Operator to automatically open the configured Smart Channel (Slack, Microsoft Team, Webex, and so forth.) with the incident launch itself. The operator needs to select the variable value as "Include" to make this happen. There can be only one channel linked to a specific incident. You can select “Don’t Include” when creating an incident, then “Include” when updating the incident. In this case, the channel will be created upon update. You can select “Include” when creating an incident, then “Don’t Include” when updating. The channel will still exist and the URL will be displayed if the variable is added as a token {SmartChannelURL} in the message.

	You can select “Include” when creating an incident, then “Include” when updating. The original created channel will still exist and no new channel will be created. You can use this variable as a token in your message, which will change to the actual channel URL for the “Include” value. This URL information will allow your recipients to join the channel quickly. NOTE: Your organization must have configured a Smart Channel Integration in order for the Smart Channel system variable to display in the Variable selection list.
Today’s Date	{date} Select MM-DD-YYYY, DD-MM-YYYY, or YYYY-MM-DD. As a condition in Publishing Options or Contacts, you can select 1-7 days of the week, as well as the Operator Time Zone or a specific time zone from the drop-down list.
_Initiator ID _Initiator Name	These variables are only available to Safety Connection organizations using Custom Safety Buttons in the Everbridge Mobile App. The purpose of these variables is to automatically include the ID and Name information of the organization contact who triggers the incident through the Custom Safety Buttons on the Everbridge Mobile App. These variables are also used in Contact Tracing exposure alerts.

Manually-Entered Token

Type the token in the desired location in the Title and/or Body fields.

The information variable name in the token must be an exact match of the information variable name as it appears in your list of information variables; in other words, letter case, spaces, and punctuation must match.

Auto-Insert Token

To insert tokens from the list

1. Click in the field where you want to insert the information variable token. This activates the "+" symbol in the list of information variables.
2. Click the "+" symbol for the desired information variables. The application will automatically insert a token at the desired location.
3. After you insert the tokens using either of the methods described above, you can move the token within the field (cut and paste), copy the token to another location in the field, or remove the token (delete).

4. You can insert the same token multiple times in the same field, and you can insert a token for any of the fields you include in your Operator form.
5. Preview your Outgoing Message by clicking **Preview.**
6. Click **OK** to return to the **Outgoing Message**.
7. Continue to Contacts.

Formatting an Email

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

As you add or edit a message, select **Include a separate message for email Notifications** and use the other text fields for plain text delivery methods such as SMS text, fax, pager, or text-to-speech conversion.

Although the toolbar appears similar to those in standard word processing applications, be aware that it offers minimal functionality compared to the formatting tools available in applications such as Microsoft Word.

The formatting toolbar was tested as follows:

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

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

- Content copied from Microsoft Office may not produce the same results as in Microsoft Office.
- Not all content copied from Web pages may be preserved in the original format if the source uses custom or proprietary HTML tags.
- Not all fonts, bullets, numbering, and indentation are supported when pasting content.

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

Other considerations include:

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

Send the Notification. (Image file sizes are excluded from the maximum **Custom Email** content size of 1 MB.)

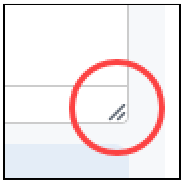
- You must enter at least one character in the plain-text Body field even if you do not want to use those delivery methods.
- Only the content of the plain-text field appears in the **Message Body** element of all reports; the content of the **Email, Everbridge Mobile App** pane is available on all reports in a separate field.
- Ensure you select one or more Email Address delivery methods for this Notification; otherwise, the Everbridge Suite application will not send the content of your **Email, Everbridge Mobile App** pane
- If your Organization uses a custom email header and footer (in **Settings** > **Organization** > **Notification** > **Email Header and Footer**), then do not include a header and footer in the **Email, Everbridge Mobile App** pane. The Everbridge Suite application automatically inserts your custom header and footer when sending the email message.

To do this:

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

   TIP: Before sending your custom email Notification, Everbridge recommends that you send a test Notification to a small number of recipients to ensure that the Notification looks and works the way you intended.

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



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

Using Images

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

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

To do this:

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

Using Tables

The most straightforward way to enter a table is to copy/paste from an external source such as Microsoft Word. From the external source, make sure that the table column widths are the desired size because they cannot be resized once the table is pasted into the **Email, Everbridge Mobile App** pane. Alternatively, insert a table directly.

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

Converting Text to HTML

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

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

Copying Content Without Characters or Formatting Tags

If you do not want hidden characters or formatted text in your custom email when you copy/paste from an external source, you can use **Paste as Text**.

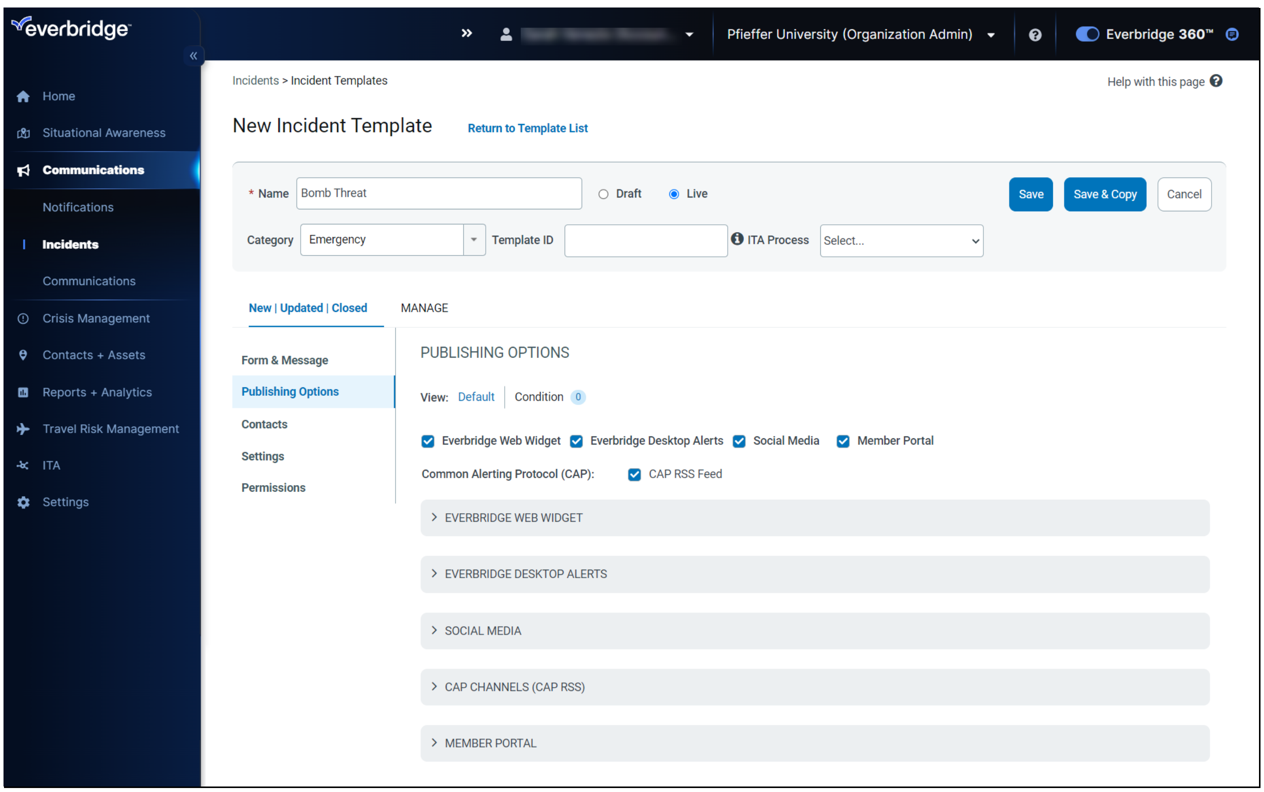
1. Select **Paste as Text**.
2. Copy the desired text from your external source.
3. Paste directly into the message window.

Publishing Options

Publishing options allow you to publish an Incident to additional outlets. There are several types of publishing options, including:

- Social media
- Audio Bulletin Board
- IPAWS
- Nixle
- Premium Audio Bulletin Board
- AlertUs
- CAP RSS

The publishing options you see depend on what is configured in **Organization Settings**.



Configure Incident Template Publishing Options

To configure publishing options:

1. From your new Incident template, select **Publishing Options**.
2. Select **Default**. Depending on your requirements, complete the details for the chosen publishing options.

Option	Description
Everbridge Desktop Alerts	Send a standard message as a desktop alert that appears on your contacts desktop to inform them about a situation. This allows you to send emergency Notifications simultaneously to your staff/ employees through an attention-grabbing full-screen alert. This is useful when you want to ensure that your contacts immediately see the alert on their desktop.
Everbridge Network	Publish your Notification to the Organizations and/or areas you indicate. You can publish to the Public and/or to Network Groups. Optionally, you can use a shape to specify the impacted area to your network.
Everbridge Web Widget	See Organization Publishing Options.
Alertus	Provides a way for personnel to relay important emergency alerts through Alertus, an Everbridge Partner providing desktop alerts, alert beacons, and digital signage.
Web Posting	To initiate Notifications to partner systems or client-side web sites, you can provide one or more URLs. Optionally, provide a corresponding username and password for each URL.
Social Media	Post your Notifications to Twitter and/or Facebook accounts. These need to be set up ahead of time in the **Settings** for your Organization. Select the linked accounts from the drop-down lists. (The accounts are linked in **Settings** > **Organization** > **Social Media**.) Twitter supports 280 characters. If your message body is longer, Everbridge posts only the first 280 characters to Twitter.
Audio Bulletin Board	Allows your contacts to retrieve an audio message at their convenience. You can use audio from the Notification message or use a new voice recording. You also have the

	option to set the Audio Bulletin Board to expire after a certain duration of time.
Member Portal	Send your standard Notification to the Member Portal members. Polling and Conference Bridge Notifications are not supported. Make sure to first select the check box to enable Notifications to Member portal from Settings > Member Portal > Notification Pages
Common Alerting Protocol • **Wireless Emergency Alerts (WEA)** • **Emergency Alert System (EAS)** • **Non-Weather Emergency Messages (NWEM)** • **COG-to-COG (CAPEXCH)** • **CAP RSS**	IPAWS allows authorized alerting authorities to send messages to multiple public alerting channels. It requires a certification to be used. The fields included are unique, depending on the IPAWS method. Note: IPAWS is only available in the U.S.
Google Public Alerts	Post your Notifications to Google Public Alerts
Nixle Channels	For Community Engagement or Visitor Engagement, the contacts must opt into receiving messages from their Nixle accounts. • Community is for public Organizations and allows contacts to opt in by by postal codes (only in the US) in addition to keywords. • Visitor Engagement uses keyword opt-ins and is for companies. Select the message type: Alert, Advisory, or Community. Then, fill in the fields for the Expires in (hours) and SMS Message.

3. Optionally, select **Condition** to add a publishing option condition. Conditional publishing options allow you to push a message to one of the Everbridge publishing options based on the information entered by an Incident Operator when launching a Notification. This automatic selection saves valuable time for your operator, as they can send a Notification quickly and accurately.
4. Select **Add a condition**.

5. Type a descriptive name for your condition. Everbridge recommends that you enter a descriptive name so that if you have more than one, it is easier to understand the purpose of each condition.
6. From **Incident Variable** drop-down list, select a variable to filter on.
7. From **Condition** drop-down list, select a condition.
8. Next, choose an available option. You can add as many filters as you like.
9. Click the **Trash Bin** to delete a filter.
10. Select the publishing options to use if the criteria above are met.
11. Optionally, add another condition.
12. You can reorder conditions by dragging them up or down to a new position. Multiple conditions are processed in the order in which they appear.
13. Click the **Trash Bin** to delete a condition.
14. Click **Copy** to copy a condition. The copied condition always becomes the last condition until you reorder it.
15. If you have several conditions, you can collapse them and expand them, depending on your requirements

Incident Contacts

In advance of an Incident, you can predefine the distribution list for an Incident Notification (that is, who must be contacted). Only the contacts in the database at the time the Notification is sent are included in the Notification.

You can add individual contacts, groups of contacts, and/or use filtered searches (contact rules), including Incident Rules, to your Incident Template. You can send to contacts under specific conditions, as well. You can allow an operator to modify the distribution list when preparing a Notification or hide the list from the operator. See Setting Incident Template Operator Permissions.

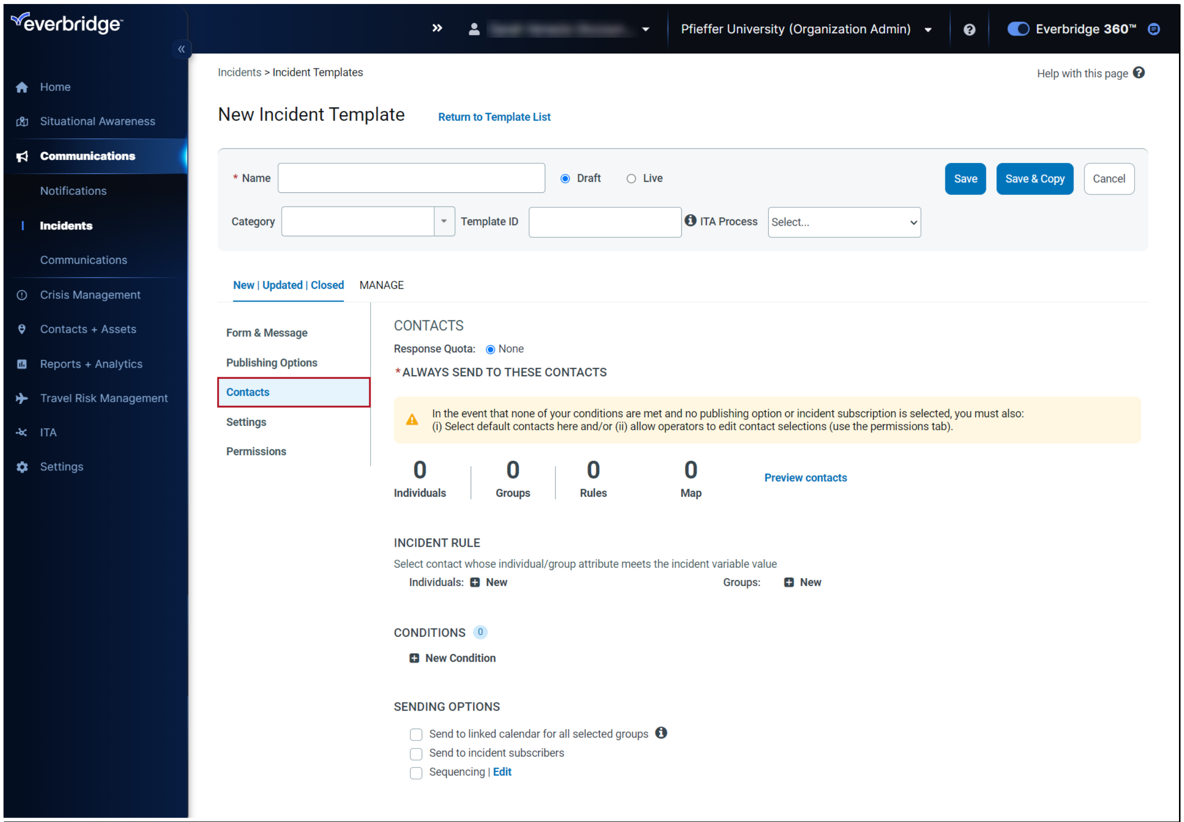
You can use a different set of contacts for your different communication phases. Incident Communications enables you to use up to three Notification phases when managing your Incident. Your Notification phases can be renamed to highlight the different types of messages you might need to send pertaining to one event:

- New
- Updated
- Closed

NOTE: See Managing Notification Phases for more details.

To define contacts for an Incident Template:

1. Click **Contacts**.



2. **Response Quota** allows you to add options for contacts to respond to a list of choices and then you can send a Follow-Up message.
   - **None** - Default
   - **Use Escalation** - You can add Notification escalations to your Incident template if you want to contact recipients in a specific order and stop reaching new contacts after a minimum amount of confirmations or polling responses are received. You can define a primary set of contacts and an unlimited number of escalation levels. You also configure the number of required responses and the escalation wait time before the application escalates to the next set of contacts. When the application receives the required number of responses to the Notification, the escalation stops and other contacts further down the list do not receive the Notification.
   - **Use Contact Batches** - If your organization has enabled this feature, you can have your Notification sent to batches of contacts rather than everyone at once. You configure:
     - Responses required - 1-999
     - Send in batch batches of - 1-9999 contacts at a time. The Notification is sent in the selected number of batches. For example, if your organization has 10,000 contacts and you set the batch size to 1, the Notification is sent in batches of 1 until the broadcast duration expires or the required quota is met.

   - Time between batches - The wait time (1-1440 minutes or 1-24 hours) before the application sends the next batch if the required responses have not been met. The Notification stops when the broadcast duration ends or the number of responses is met. For example, if your broadcast duration is set to 2 hours, but you set the time between batches to 5 hours, the Notification ends before the second batch is sent.

     Notes:

     - A batch is a random selection of targeted contacts. That is, you cannot select which contacts are in a batch. A batch can include contacts selected as Individuals, part of a group/rule, map selection, Incident conditions/rules, and so forth. From **Notification Details**, you can determine the associated batch for a contact via the Date/Time stamp.
     - You are not informed of the number of batches to be queued/planned when you click **Send** because it cannot be determined in advance if the quota is met in the first batch and therefore no further batches will be sent.
     - The Sequencing sending option is not supported when using Contact Batching.
     - To avoid conflicts, the Contact Batching quota is not available when using the Polling quota.
     - When the template is set with Edit Contact permission, the Incident Operator can change the configured values for Contact Batching options during the launch.
     - In Settings, Request Confirmation is required.

3. Next, configure who you want to send an Incident to.
   - **Individuals**. Click **Individuals** to select individuals by name.
   - **Groups**. Click **Groups** to select groups your organization has created. Sequenced groups are indicated by the Sequenced Group icon (silhouettes and arrow). The order of the contacts in the sequenced group is the order in which they will be contacted. If there are two sequenced groups, for example, contact #1 from each group is notified in parallel, then after the listed wait time, contact #2 from each group is sent the Notification, and so forth. When the number of replies is met, no other contacts are notified.
   - **Rules**. Click **Rules** to apply rules your organization has defined to select contacts with certain attributes.
   - **Map**. Select **Map** to select contacts by their static or dynamic location on the map. The **Geo-Shape** variable type only supports static locations. For example, you can draw a circle around the location that includes the contacts in the database who have an address in the circle. If available, you may be able to manage Incident zones. See Managing Incident Zones.

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

4. From **Sending Options**:

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

<table>
<tr><td></td><td>the Notification is sent, the sequence group contacts are used.</td></tr>
<tr><td>Send to Incident subscribers</td><td>If you have configured Incident subscriptions and included the identical variables in your Incident template, then, when the Notification is sent, the Incident includes the subscribers as well as the contacts in the template. Subscribers can be from the Manager Portal and the Member Portal. When this sending option is selected, you can also send follow-up Notifications.</td></tr>
<tr><td>Use map shape as an Incident Zone</td><td>All contacts who are in or enter the area defined by your shape files during the broadcast duration will receive this message.
Public agencies using public Incident zones reach anyone in their shapes via the Everbridge Mobile App.
Private organizations using private Incident zones launch an Incident to contacts registered with their organization's credentials via the Everbridge Mobile App and selected delivery methods for that Incident.
See Managing Incident Zones.</td></tr>
<tr><td>Sequencing</td><td>If your organization has enabled Sequenced Groups, you can take advantage of sequenced groups (where your contacts are sent a Notification, in order, until a specified number of contacts has replied).
If your rule uses a Sequenced Group, Sequencing | Edit is displayed. Select Edit. From the Sequencing field, toggle sequencing ON. As needed, change the Wait Time (the default is 5 minutes). The Wait Time is the escalation time between each contact in any targeted shifts. The wait time can be adjusted to any number between 1 and 1440 minutes or a maximum of 24 hours. If there are multiple layers in the targeted shift, escalation from the last contact of a layer to the first contact of the next layer follow the escalation wait time defined in the template. Set the number for the Default Responses Needed so that you do not need to change it each time in the template. Setting this number can also be used for groups where Sequencing is turned off, then on again.</td></tr>
</table>

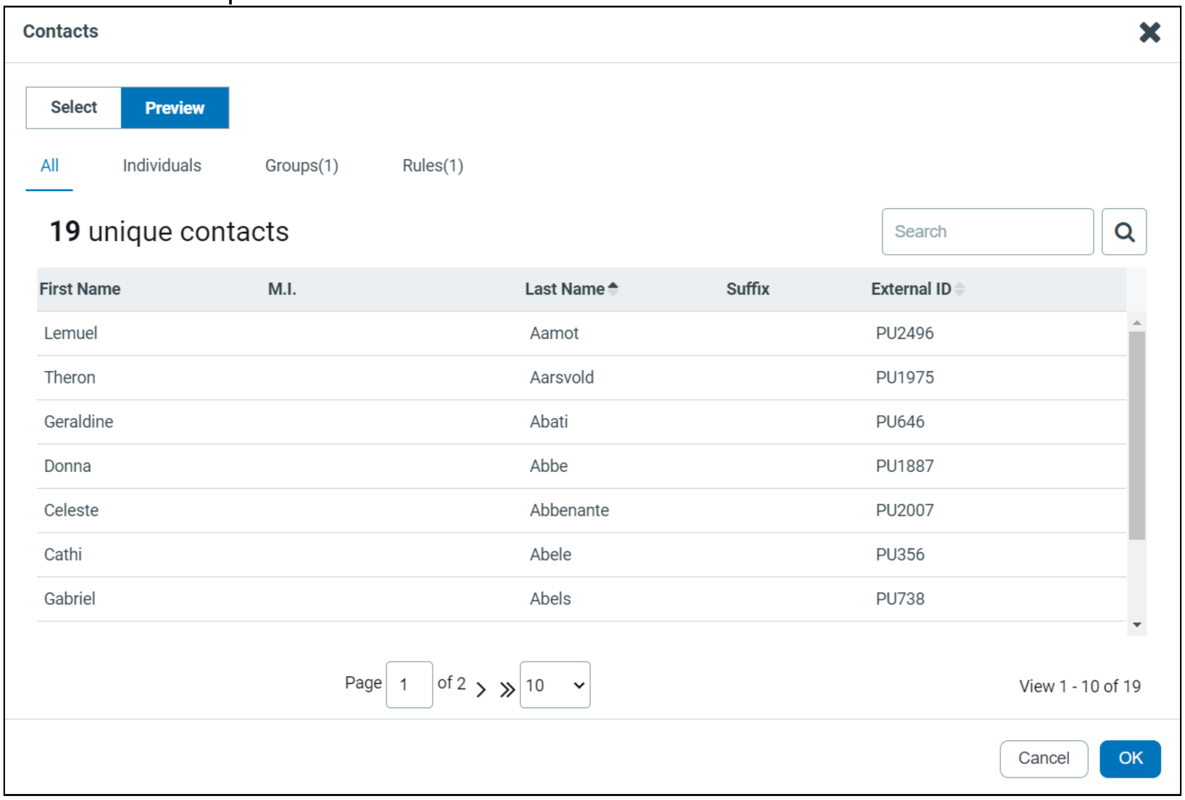
	For example, if you set up a rule that uses a calendar filter with **On Shift** set to **Now**, the contacts returned is different each time, depending on the time of day. 5. In **Responses Needed**, enter the number of responses needed before the Notification ends. (The default is 1 response.) If you are using Notification escalation, the **Total Responses Needed** is dependent on Sequenced Groups and regular contacts. In other words, responses from both Sequenced Groups and normal Contacts count toward the **Total Responses Needed**. 6. Under the **Group Name**, you see how the sequenced group was added - manually or via [*Rule Name*].
Split Notification for each group	When sent, the Notification is separated for each group. For example, if you selected two groups, **Incident Details** shows two separate Notifications. Other contact types are included in a single Notification. You cannot split Notifications for **Send Follow Up** or **Scenarios**.

Previewing Selected Contacts

You can optionally preview the list of selected contacts:

1. From **Contacts**, select **Preview**. From **All**, you see the names of all the contacts you have selected, whether as Individuals, from a group, a rule, and/

or from the map.



2. Or, select **Individual** and from **Contacts**, select **Preview**. You see the specific contacts you have selected. For example, under **Groups**, the number of groups you selected are displayed and the list shows the contact names of all the group members.
3. Click **OK** to close the **Contacts** dialog.

Using Incident Rules

In your Incident templates, you can build Incident rules to directly search out contacts—individuals and/or groups—whose additional information attributes match with Incident variables. You can create a maximum of ten Incident rules at a time.

If you use a single Incident rule in your Incident template, different conditions use **and** as logic; if you have multiple Incident rules in your Incident template, the logic is **or**.

Make sure that the variables you want in your Incident rule are selected on the Operator's Form. Additionally, make sure the additional information fields you want to map to are included in contact records. Note that the Incident variable names and additional information names do not need to match, but the values do.

You can configure the following types of Incident rules:

- Creating Incident Rules for Individuals
- Creating Incident Rules for a Calendar and/or Associated Groups
- Creating Incident Rules for Groups

Creating Incident Rules for Individuals

To create Incident rules for individuals:

1. Select **Contacts** and from **Incident Rules**, click **New**.
2. From **New Incident Rules-Individuals** dialog, in **Name**, type a descriptive name for your Incident rule.
3. From **Contact Attribute** drop-down list, select the desired additional information name. The contact attributes are:
    1. Static Location
    2. Calendar
    3. Associated Groups
    4. your Organization's **Additional Information** fields.
4. Select one of the following formulas from the drop-down list:
    - **starts with** - the Incident variable is a single choice when selecting this formula. This formula is part of a 2-rule relationship.
    - **ends with** - the Incident variable is a single choice when selecting this formula. This formula is part of a 2-rule relationship.
    - **is equal to** - when using **is equal to**, if the Incident variable and the contact additional information are both multiple choices, **contain** logic is used instead.

5. From **Incident Variable** drop-down list, select the desired variable name. When the Incident is launched, the operator selects the matching value from the drop-down selections.

> **NOTE:** The **Contact Attribute** name and **Incident Variable** name do not need to match. However, the operator-selected value must match the Incident variable when the **is equal to** value comparison is used.

6. Optionally, filter additional contact information.
   - Select the desired contact field from **Condition** drop-down list.
   - Select the value from the drop-down list.
   - Repeat this step to add additional contact filtering.
7. Repeat steps 3-6 until you have added all your conditions for the Incident rule.
8. As needed, select the **Operator Input** value from the corresponding drop-down list.
9. Click **Preview** to see the list of contacts dynamically selected. See which contacts match the Incident variables.
10. From **Add Incident Rule-Individuals** dialog, click **+New** to add another condition.
11. Click **Contact Preview** to see the Incident variables.
12. Click **Save** to save the Incident rule.

Creating Incident Rules for a Calendar and/or Associated Groups

To create Incident rules for a calendar and/or associated groups:

1. Select **Form & Message**.
2. Select **Onshift Date Range** variable type in your Incident template.
3. Select **Contacts**.
4. Click New.
5. Give your Incident rule a name.
6. From **Contact Attribute**, select **Calendar > On Shift** appears, allowing you to map a variable for the calendar.
7. In **Value comparison**, **is equal to** is selected by default.
8. In **Incident Variable**, select a variable, which can be a Text Box or a Single Selection variable.
9. In **>On Shift**, **is** is selected by default
10. In **Incident Variable**, select either
    - Your **On-shift Date Range** variable, to automatically match the time range. If you do not enter a time (HH:MM), then your dates must be different
    - **Now.** There must be at least one minute difference in the time range.

> **NOTE:** If you choose a DateRange variable from **Compare value from a contact and Incident variable** and **Additional contact filtering**, the **Additional contact filtering DateRange** variable is ignored

11. Select **New** to add an Associated Group.
    - **Contact Attribute**: **Associated Groups**, which only matches to the group name.
    - **Value comparison**: **is equal to**
    - **Incident Variable**: select a variable, such as **Group.**

> **NOTE:** The relationship among Calendar, Associated Groups, and Additional Contact Attributes are AND. If the condition of any of the Calendar, Associated Groups, or Additional Contact Attributes returns zero contacts, the entire Incident rule will return zero contacts irrespective of the outcome of additional filter conditions (if applied).

12. Optionally, click **Contact Preview**, then **Preview** to see the results of your rule.
13. Click **Save**.

> **NOTE:** If an Associated Group or some of the Associated Group is chosen, then the sequence is not supported.

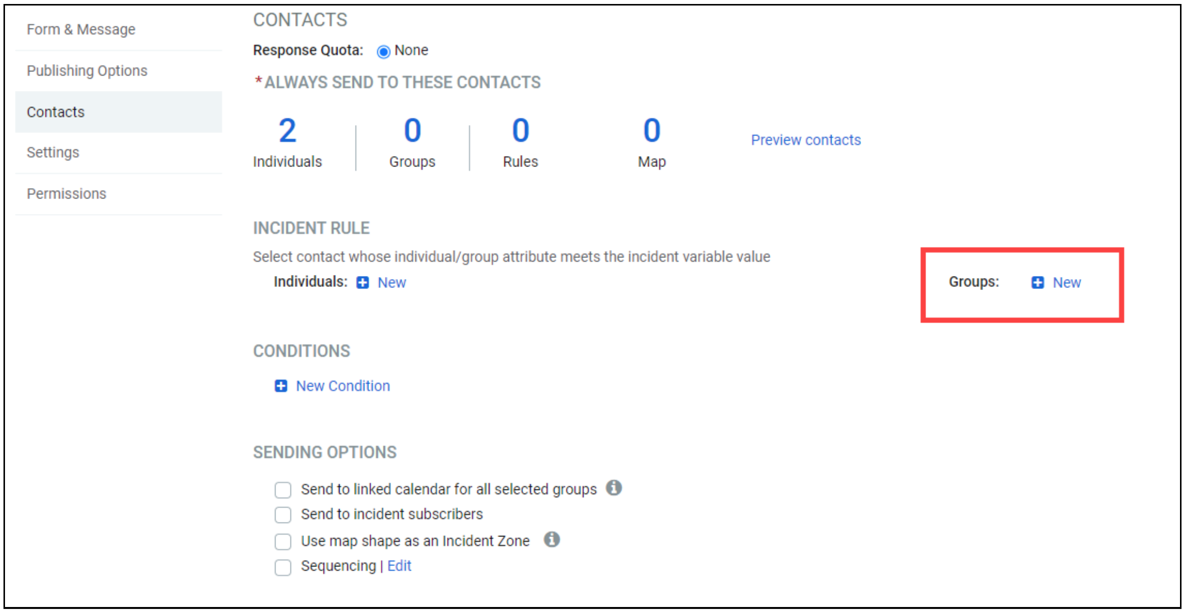
Creating Incident Rules for Groups

The following Incident variable types are supported:

- Single Selection
- Multiple Selection
- Textbox
- Existing Object Name

To create Incident rules for groups:

1. Select **Contacts** and from **Incident Rules**, next to **Groups**, select **New**.



2. From **New Incident Rule - Groups** dialog, in **Name**, type a descriptive name for the Incident rule.
3. From **Group Attribute** drop-down list, select one of the following:
   - **Group name**
   - **Group Lookup Property**. This allows you to target a Notification to specific groups by selecting the linked property values.

     If you are creating Group Incident Rules using CMDB Mapping, set the Group Attribute to the CMDB property value.
4. From **Incident Variable** drop-down list, select the corresponding variable name. When an Incident is launched, the operator selects the matching value from the drop-down selections.

   If you are creating Group Incident Rules using CMDB Mapping, you must include all variables needed to target groups per CMDB mapping.The name between the Incident variable and the CMDB property does not have to match.
5. Click **Save** to save the Incident Rule. You can have up to 10 group Incident rules.

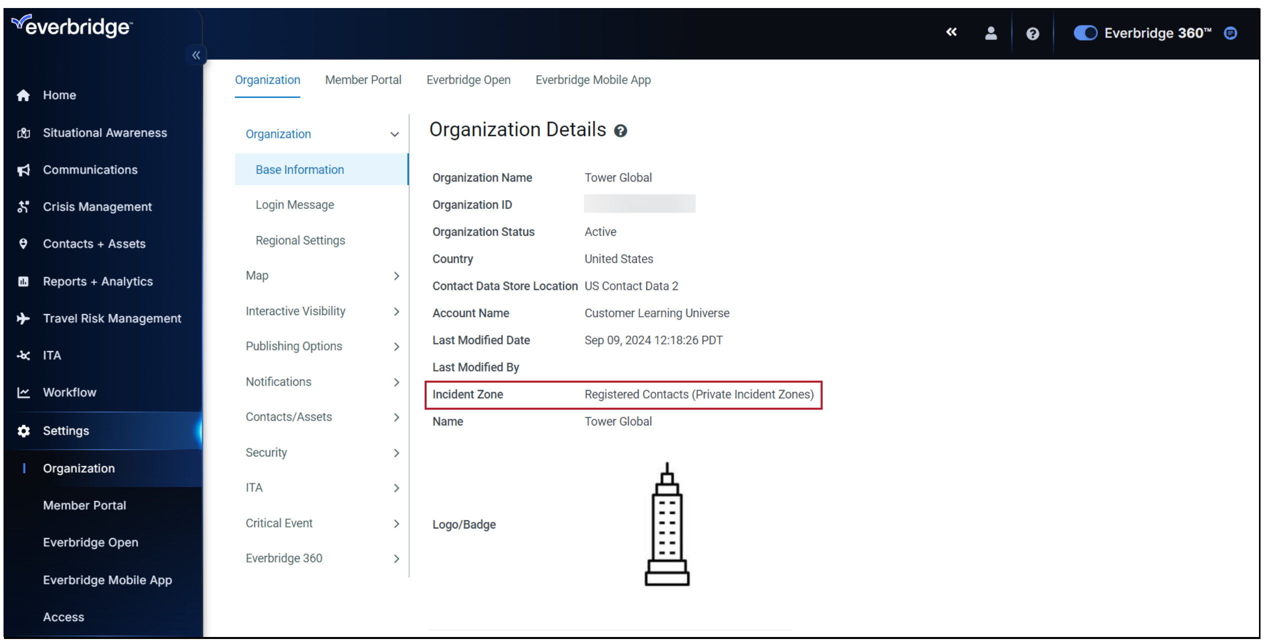
Managing Incident Zones

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

There are two types of Incident Zones:

- **Anonymous Contacts (Public Incident Zone)** - Public Incident Zones are used by State and Local Governments, where the end-user locations are anonymous.
- **Registered Contacts (Private Incident Zone)** - Private Incident Zones, a Safety Connection feature, are used to see which employees are in an impact area and message them.

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



To manage Incident Zones:

1. If available to your Organization, map your Incident Zone by placing at least one polygon on the map.
   - **Public Incident Zone** - The Everbridge Mobile Safety App delivery method is required and automatically selected for the Notification with a contact cycle value as 1, which cannot be changed. Anyone with the Everbridge Mobile Safety App in location-sharing mode will receive the

push Notification if they are either in the Incident Zone or enter into the Zone while the Zone is active.

- **Private Incident Zone** - All Org contacts will receive the Notification whose last known location is found (through Everbridge Mobile Safety App or other integrated means) inside the Incident Zone while the Zone is active. You can set the contact cycle to more than 1 for these Notifications.

> **NOTE:** Only the Standard message type can be used in an Incident Zone. Polling or Conference Bridge message types cannot use an Incident Zone.

2. Select **Use map shape as an Incident Zone**.
3. Review the following notes:
   - Public agencies using Public Incident Zones reach anyone in their shapes via the Everbridge Mobile App.
   - Private Organizations using Private Incident Zones launch an Incident to contacts registered with their Organization's credentials via the Everbridge Mobile App and selected delivery methods for that Incident.
   - If the Notification is scheduled with an Incident Zone, stopping the Notification cancels the Incident Zone broadcast.
   - While launching a Notification with the **Incident Zone** flag on, a **Confirm** dialog is displayed. The message in the Incident **Zone Confirmation** dialog differs depending if you have a private or public Incident Zone.

Dynamically Selecting Contacts

In your Incident template, you can have static contacts and/or settings based on the operator or system inputs. Additionally, you can set up optional conditions for an Incident. You might want to do this, for example, if you want to send messages to a different workforce based on the time of day, or day of the week, the Incident is initiated. These dynamic selections can be defined for each phase of the Incident template. In other words, you could use one set of dynamic conditions for the **New** phase of an Incident and a different set of conditions for the **Update** phase of the same Incident.

The following are examples of using dynamic contacts and/or settings along with your static contacts and/or settings.

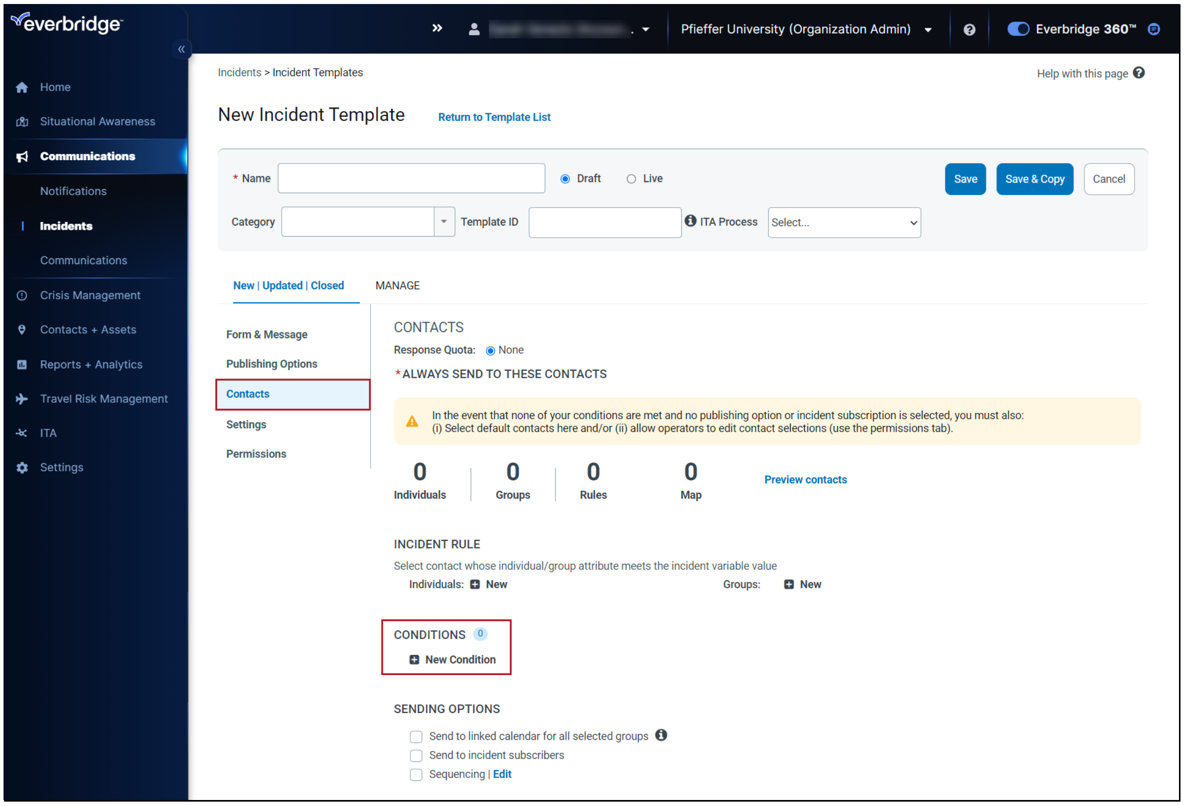
- Add on-call personnel if Notifications are sent between 12:00 A.M. and 8:00 A.M.
- Include the Fire Team A group if the Incident is located at the Fuel Depot and the severity is low.
- Send only to email delivery methods if the Notification is sent on Saturday or Sunday.

As soon as a condition is met, the contacts selected for the condition are used in addition to the contact selections you made when configuring an Incident template.

To dynamically select contacts:

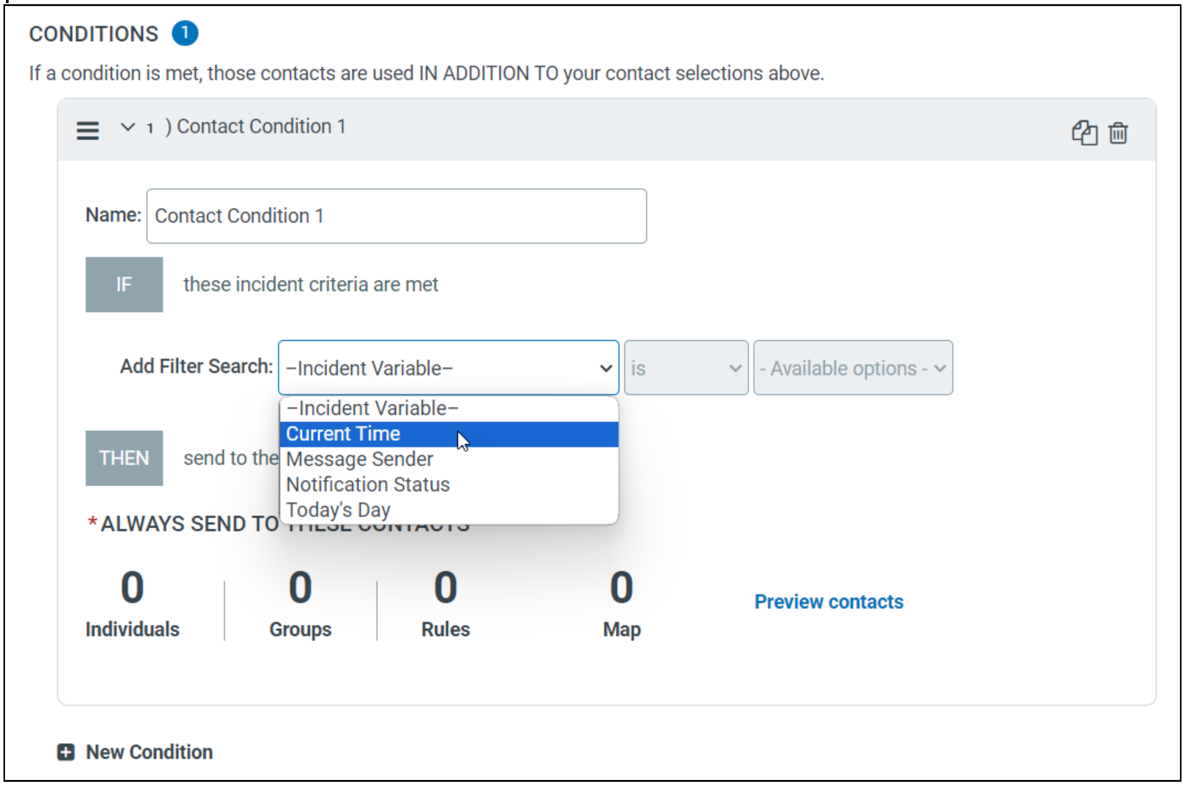
1. Select **Contacts**.

2. Select **New Condition**.



3. In **Name** field, type a descriptive name for your condition, so that you can see at a glance what the condition is without having to expand or collapse the condition.
4. From **Incident Variables** drop-down list, select your variable. The variables listed here are from the variables used in the Operator Form for this specific phase of the Incident Template. The variables include all the application-

provided variables as well as the client-defined information variables.



5. Select the operator based on the variable you chose. The operators are displayed according to the variable.
6. Type or select a value, as appropriate.
7. Repeat steps 3-6 for all Incident criteria to meet in this single condition.
8. Select the contacts to whom to send the Incident when a condition is met. See Selecting Contacts.
9. Optionally, add another condition. If you add another condition, the **Enable the system to evaluate all the conditions for all levels** check box is displayed. If you select this check box, the application evaluates all the conditions and executes all the conditions that are true. The application compiles the distribution list by aggregating the contacts from each true condition. If you do not set this check box, Everbridge Suite only reaches contacts who meet the first condition listed based on the order of conditions built in a template.

   You can reorder your conditions by dragging them up or down. Each condition is processed, but as soon as any one condition is met, those inputs are used. Multiple conditions are processed in the order in which they appear.
10. Alternatively, if you do not want to start a condition from scratch, select **Copy** to copy a condition. The copied condition always becomes the last condition until you reorder it.
11. Depending on your requirements, you can expand or collapse conditions to make them easier to edit.

12. You can delete a condition at any time by selecting the **Trash Bin**.

Setting up a Condition to Preview Dynamic Contacts

To set up a condition to preview dynamic contacts:

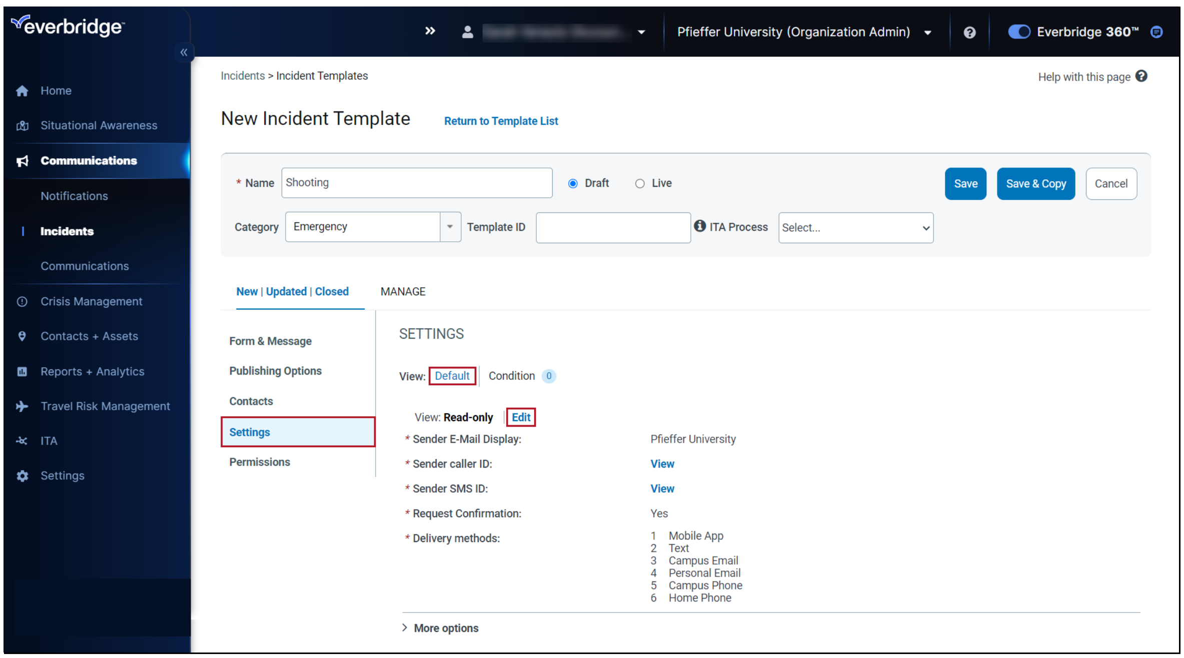
1. Select **Contacts**.
2. Select **New Condition**.
3. In **Name** field, type a descriptive name for your condition, so that you can see at a glance what the condition is without having to expand or collapse the condition.
4. From **Incident Variables** drop-down list, select **Today's Day**.
5. Select **contains** operator.
6. Click each weekday. This selects Monday through Friday.
7. Optionally, select **Operator Time Zone** or a specific time zone from the drop-down list
8. In the THEN section of the condition, select at least one contact.
9. Save your template to LIVE.
10. Launch an Incident.
11. Select the template you just created.
12. Enter any details on the form, then click **Next**.
13. Scroll to view your contacts:
    - **Static**: Select **Preview contacts from *Always send to these contacts**.
    - **Dynamic**: **Select Preview contacts from Dynamic Selections**.
14. Update your Incident as needed.
15. Click **Send**.

Configuring Incident Template Settings

Settings let you specify the delivery methods, order, timing, and additional outreach customization, for the Incident template. The initial Default Settings visible in a template are driven by Organization-wide settings configured in **Settings** by Organization or Account Administrators, and may not need to be adjusted.

To edit **Default** settings in an Incident Template:

1. Select **Settings**, and then **Default**.
2. Select **Edit**.

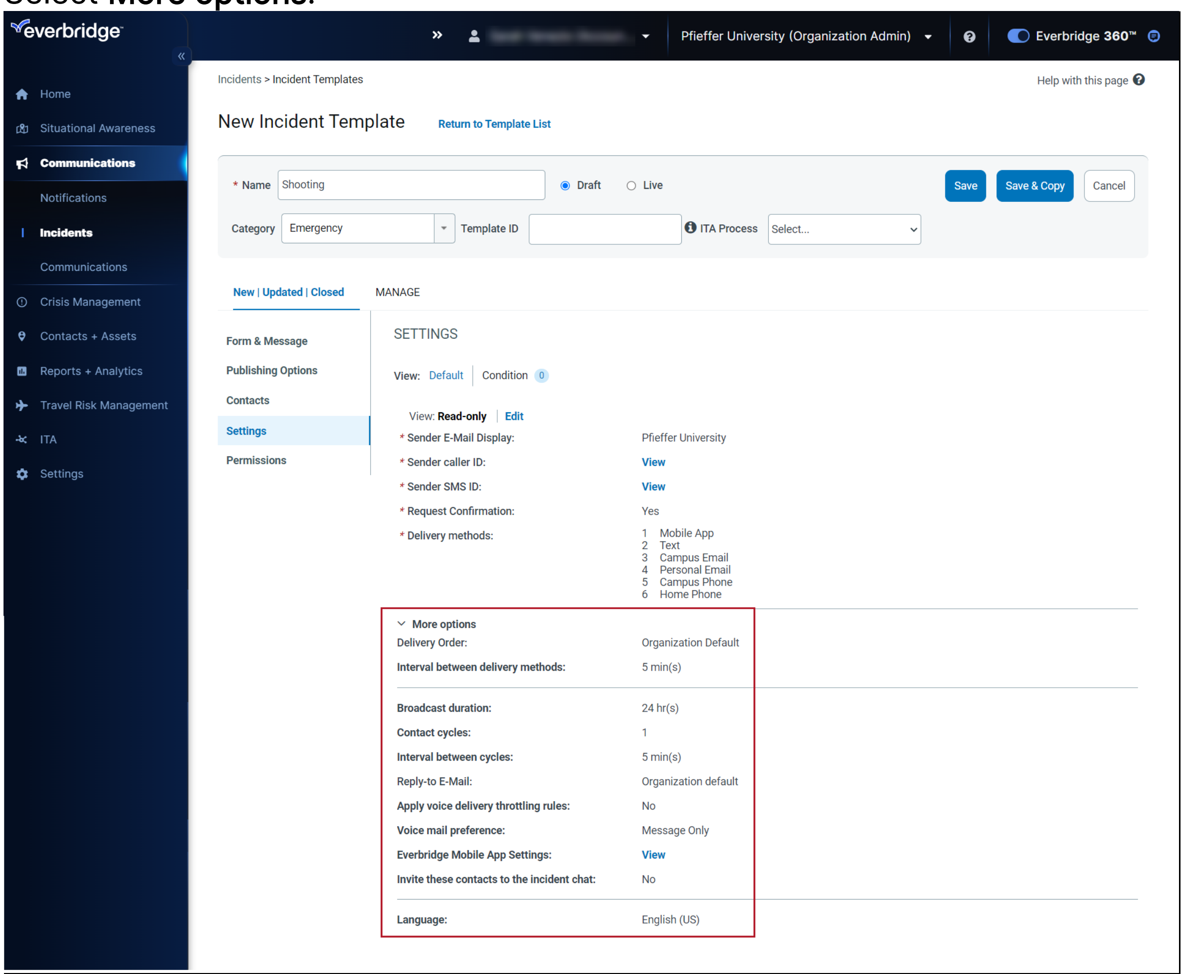


3. Required fields are indicated with a red asterisk (*).

Option	Description
*Sender E-Mail Display	Allows you to change the address to something recognizable to the contacts so they are more likely to open it. Everbridge recommends using a real name for your Alert system and not an email address here. This avoids emails being accidentally marked as phishing attempts.
*Sender caller ID	Allows you to change the phone number that your contacts see displayed when they receive a Notification via phone.
*Sender SMS ID	When a Notification is polling, conference, or standard with confirmation, only Everbridge Numeric SMS ID is used.

*Request Confirmation	Allows you to request that your contacts confirm that they have received the message. It also stops any further attempts to reach them with a Notification. Everbridge recommends leaving confirmation enabled.
*Enforce Privacy	Enforcing privacy limits your delivery methods to only Everbridge Mobile App and displays **New Private Notification** on the device home and lock screen instead of a Notification subject.
*Delivery Methods	Delivery methods are the ways that your contacts receive a Notification.

4. Select **More options**.



Option	Description
Delivery Order	Allows you to select the order of the delivery methods used for the Notification.
Interval between Delivery methods	Controls how long the system waits before moving on to the next delivery method for a contact.

Broadcast duration	Controls how long the Notification is active to send messages and receive confirmations.
Contact cycles	Controls how many times Everbridge attempts to deliver the Notification across all of the device types for the contact for those who have not yet confirmed, or across all delivery methods for all cycles if confirmation is disabled.
Interval between cycles	Controls how long the system waits before starting another cycle of Notification.
Reply-to-E-Mail	Allows you to set a custom email address that your contacts can reply to for more information.
Apply voice delivery throttling rules	Sets a limit on the amount of calls sent to phones at one time. This minimizes the risk of overwhelming a telco (telephone company) service with too many long-distance calls at once, as this can result in calls being placed to new contacts beyond the initial throttling rule, once contacts originally reached, hang up.
Voice mail preference	Controls what Everbridge does when leaving a voice message. You can select whether to end the call, leave the message, or leave the message along with call-back information for confirming receipt. No matter which option is selected, missed calls alerts still appear on the phone of contacts who do not pick up the initial phone call.
Everbridge Mobile App Settings	Allows you to control settings related to one-time response, image sharing and location-sharing capabilities, specifically in the Everbridge Mobile App.
Response subscriptions	Response Subscriptions allow you to receive confirmations and polling responses from Notification recipients and put those responses into your third-party systems.
Invite these contacts to the Incident chat	Allows you to invite contacts to an Incident chat from the details page of that Notification.
Language	Controls the language of Everbridge's voice prompts and text prompts as well as the style/tone used by the text-to-speech engine.

5. Optionally, from **View**, select **Read-only** when you are done.

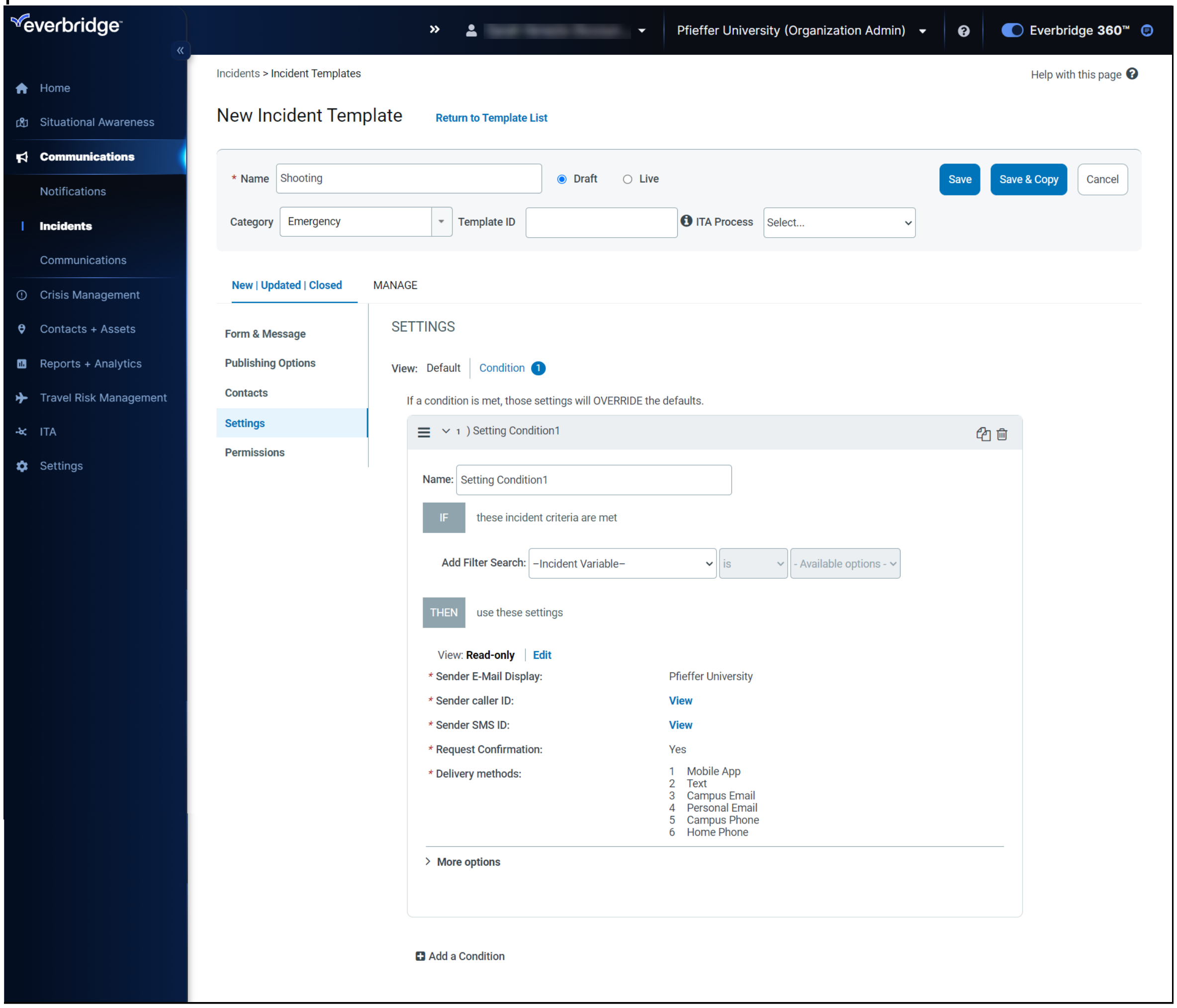
Adding Conditions for Dynamic Settings

You may add conditions for dynamic settings if, for example, you want to send messages to a different workforce based on the time of day, or day of the week, the Incident is initiated.

To add conditions for dynamic settings:

1. Select **Settings**.
2. Select **Condition**. The **Condition** pane is displayed.
3. Click **Add a Condition**. **Setting Condition #,** where # is the number of the condition, is displayed.
4. In **Name**, type a descriptive name for your condition. This it makes it easier to understand at a glance what your condition is, without having to open or expand the condition each time.
5. From **Incident Variable** drop-down list, select your variable. The variables listed here are from the variables used in the **Operator Form** for this specific phase of the Incident Template. The variables include all the application-

provided variables as well as the client-defined information variables.



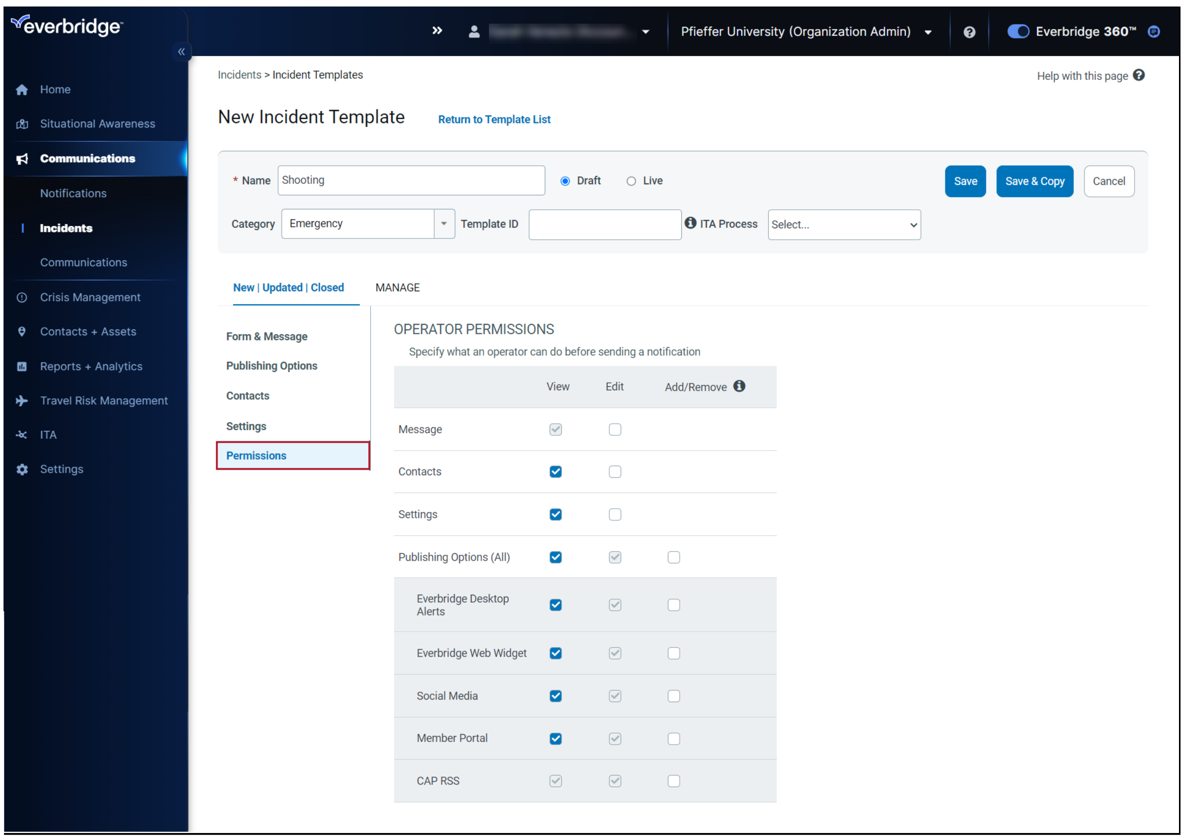
6. Select the operator based on the variable you chose. Operators are displayed according to the variable.
7. Type or select a value, as appropriate.
8. Repeat Steps 5-7 for all Incident criteria to meet in this single condition.
9. Select **Edit** to change the settings for this condition.
10. Select the settings to be used when the condition is met. See Configuring Incident Template Settings.
11. Optionally, collapse the condition by selecting the down arrow.
12. Optionally, select **Add a condition** to add another condition and repeat Steps 4-8. You can reorder your conditions by dragging them up and down. Multiple conditions are processed in the order in which they appear.
13. Alternatively, select **Copy** to copy a condition if you do not want to create a new condition from scratch. The copied condition always becomes the last condition until you reorder it.
14. To delete a condition, select the Trash Bin.

Setting Incident Template Operator Permissions

In your Incident template, you can optionally change the permissions for each Notification phase. You can limit operators' permissions to just the message body, contacts, and settings, or give them permissions to everything.

To set Incident template operator permissions:

1. Select **Permissions**.
2. Select the corresponding checkboxes to specify what operators can do before sending the Incident. By default, operators can view messages, but not edit them.



3. Optionally, if you want operators to edit messages, select the **Edit** checkbox next to **Message**.
4. Optionally, for **Contacts**, if you want operators to:
   - View only. Operators with view-only permission can preview the contacts, but not edit the contacts.
   - View and Edit. If your operators have permission to edit contacts, they can edit only the static contacts, and not the dynamic contacts.

Select the corresponding checkboxes next to **Contacts**. If you do not check **View** or **Edit** for **Contacts**, this section is not visible to operators launching an Incident.

5. Optionally, for **Settings**, if you want operators to:
   - View only. Operators with view-only permission can preview settings, but not edit the settings.
   - View and edit settings. If your operators have permission to edit settings, they can edit any settings.

   Select the corresponding checkboxes next to **Settings**. If you do not check **View** or **Edit** for **Settings**, this section is not visible to operators launching an Incident.

   NOTE: If your operators cannot edit Contacts, make sure you select contacts in the Incident Template; if your operators cannot edit Settings, make sure you select the delivery methods; and if your operators cannot edit the Outgoing Message, make sure you enter the message and its corresponding options. Otherwise, the application will not save the template until it has recipients for the Notification, delivery methods, and the outgoing message.

   An operator cannot view, edit, or remove the escalation policy from a template while launching Notifications.
6. If you want to allow the operators to add or remove publishing channels, select the corresponding checkboxes or select **Publishing Options (All)** checkbox.
   - When you select the **View** permission, the **Edit** checkbox is automatically selected.
   - By default the operators can view and edit the form items of all publishing options.
   - For IPAWS/CAP RSS, the **View** and **Edit** permissions are always be selected.

Using Conference Bridges

Conference Notifications support various types of conference bridges. The types you have available depend on your Organization.

> **NOTE:** Contact your Account Manager if you want to use a Conference Bridge to which you do not have access.

- **Standard Conference Bridge** - Everbridge provides four default Conference Bridge lines with four unique access codes to a non-hosted Conference Call Center. You cannot make any changes to these. Using the standard Conference Bridge allows you to select a conference-type Notification where up to 96 contacts can join an Everbridge-provided Conference Bridge. Contacts are prompted to enter an access code after dialing into the Conference Bridge.
- **Custom Conference Bridge** - You can enter your own custom Conference Bridges utilized from services outside of Everbridge. When creating a custom Conference Bridge, you can choose a country and associate an international number to the custom Conference Bridge that can be shared in your SMS body or email. A Custom Conference Bridge allows you to select a conference-type Notification where contacts join a customer-supplied Conference Bridge. Contacts are prompted to enter an access code after dialing in to the custom Conference Bridge.
- **Smart Conference Bridge** - This Conference Bridge is only available as part of Incident Communications. A Smart Conference Bridge allows you to select a conference-type Notification where up to 250 contacts join an Everbridge-provided smart Conference Bridge. Contacts do not need to enter an access code after dialing in, and join the conference automatically. Smart Conference Bridges are available as an add-on to your Organization.

  > **NOTE:** Your Everbridge representative enables your Smart Conference Bridges.

Using Smart Conference Bridge with International Numbers

For international numbers, a Smart Conference Bridge allows you to use multiple international numbers as a single Bridge. It allows international recipients to call the Bridge via the local number or the closest number available. A smart conference Bridge consists of one primary number and other chosen Bridge numbers. For example, you can set a US primary number, and add UK, Germany, and France numbers to it for a single Bridge. While the customers in the UK can press 1 to join the conference voice call, they can also opt to dial into the Bridge via their local number.

When sending a smart conference Bridge to international recipients, different paths treat the international number differently.

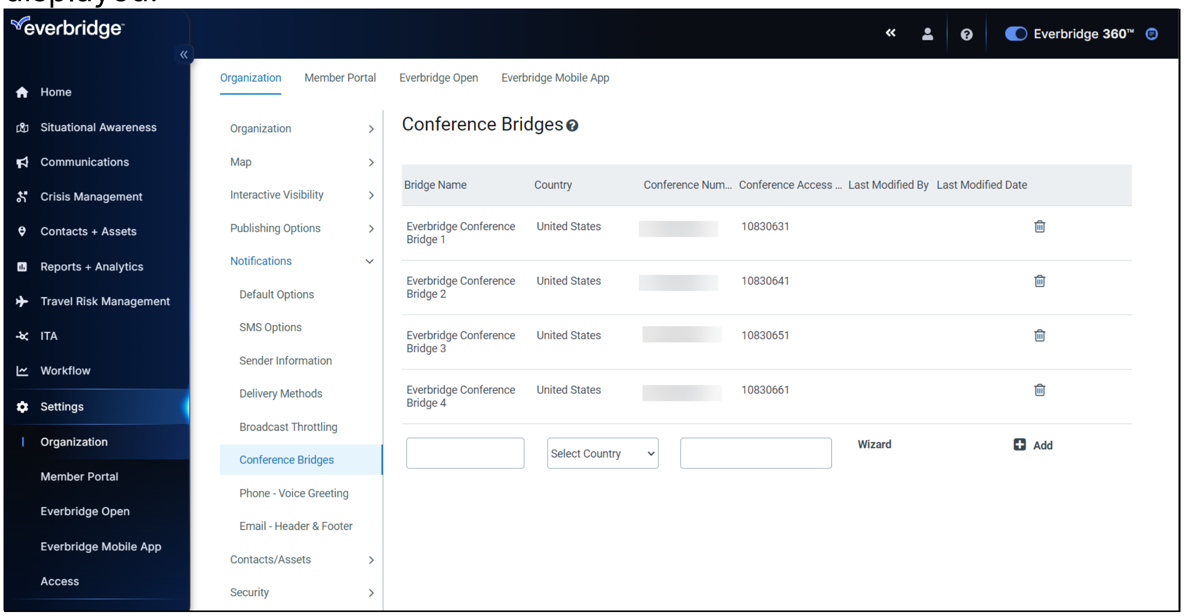
- **Email/SMS** - The message includes all the Bridge numbers.
- **Voice mail** - The message only includes the primary Bridge number.
- **Voice** - The voice call originates from the US and the customer can press 1 to join. If the customers know the local smart conference number, they can use the local number to call in and join the Bridge.

Each Bridge can only have one primary number. Our implementation services can help you design the conference Bridge number configuration.

Adding a Custom Conference Bridge

To create your own custom Conference Bridge:

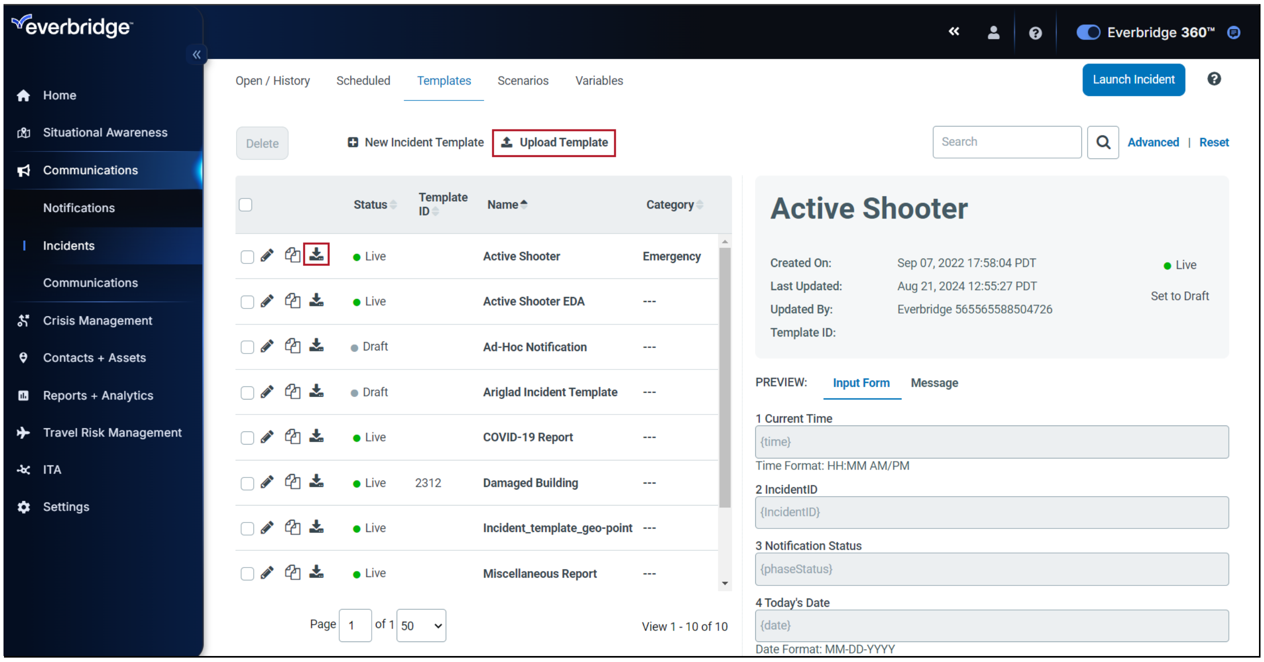
1. Select **Settings** > **Organizations**.
2. Select **Notifications** > **Conference Bridges**. The list of Conference Bridges is displayed.



3. By default, there are four standard Conference Bridges that use the US conference number. You can build your own custom line using the US conference number as needed.
4. In **Bridge Name**, type the name of the bridge.
5. Optionally, select a country from the **Country** drop-down list.
6. Type your conference number.
7. To add an access code, select **Wizard**.
8. To use an international number associated with the Conference Bridge name, click **Copy international numbers**. An **Alert** dialog informs you that the international number has been copied to the clipboard.
9. Paste the international number to the SMS body or email to share it.
10. Select **Add** to add your custom Conference Bridge.

Downloading and Uploading Incident Templates

You can download a template from one Organization and upload it to a different Organization within the same Account so it does not have to be recreated from scratch.



To do this:

1. From the Organization where your template exists, select **Incidents** > **Templates**. The list of existing Incident templates appears.
2. Click **Download** beside the desired template to download. You can only download one template at a time.
3. From **Alert** message, click **OK**. The file is downloaded as an XML file. The message title, message body, and closing text are supported elements. Rich text and tokens are supported as well.

> **NOTE:** Contacts and settings are not downloaded from the original Incident template.

4. From **Incidents**, select the Organization where you want to upload the downloaded template.
5. Select **Templates**. The list of existing Incident templates appears.
6. Click **Upload Template**.
7. Navigate to the XML file you want to open and click **Open**. You can only upload one file at time. The file must be in the correct XML format or the file

will not upload. The filename must exclude special characters, except for spaces and hyphens, so you might need to rename the file.

> **NOTE:** If you are uploading a template to an Organization that has a variable with the same name as a variable that already exists in the Organization, then Everbridge Suite keeps the original variable, and, the variable with the same name is not uploaded.

8. Click **OK** to the **Alert** message.
9. Refresh the page by clicking **Reset**.
    - The upload is **Draft**, and you can change it to **Live** if needed.
    - The template name is case-sensitive. You can change the name of the XML file.
    - Add contacts and settings to save this template.
    - Permissions are uploaded with **Edit** permissions **ON**, and you can change them to **OFF** if desired.
    - If you have a Template ID or Category assigned to a template in an Organization, when you upload a template to an Organization, the Template ID and Category are uploaded. You must manually reconfigure the Template ID and Category once you have uploaded the template.

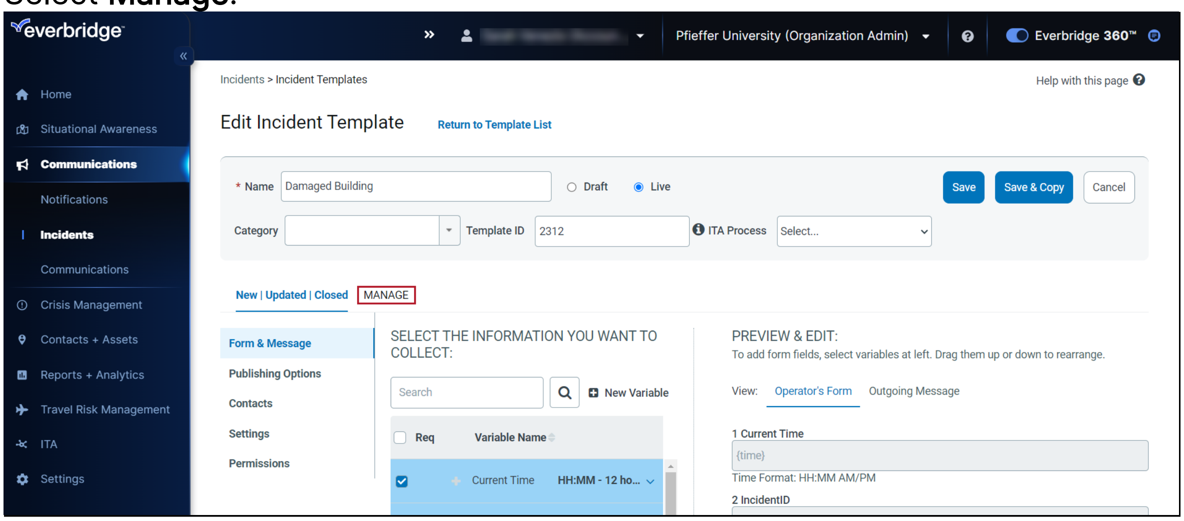
Managing Notification Phases

You could use a different set of rules for your communication phases.
Incident Communications enables you to use up to three Notification phases when managing your Incident.

- New
- Updated
- Closed

You can customize the phase names according to your communication plan. To create Notification phases:

1. Select **Incidents** > **Templates**.
2. Depending on your requirements, add a new template or edit an existing template.
3. Select **Manage**.



4. The **Manage Notification Phases** dialog is displayed. Double-click **Incident Tab Name**, to rename the Notification phase.
5. Select **Copy** to add other phases.
6. Rename the copied Incident tab name and select the required phase.
7. Repeat Steps 5 - 6 for the other phases you want to create.
8. Click **OK** to close the **Manage Notification Phases** dialog.
9. Save your Incident template.

NOTE: The underlying Incident template is carried over to each phase until you change it.

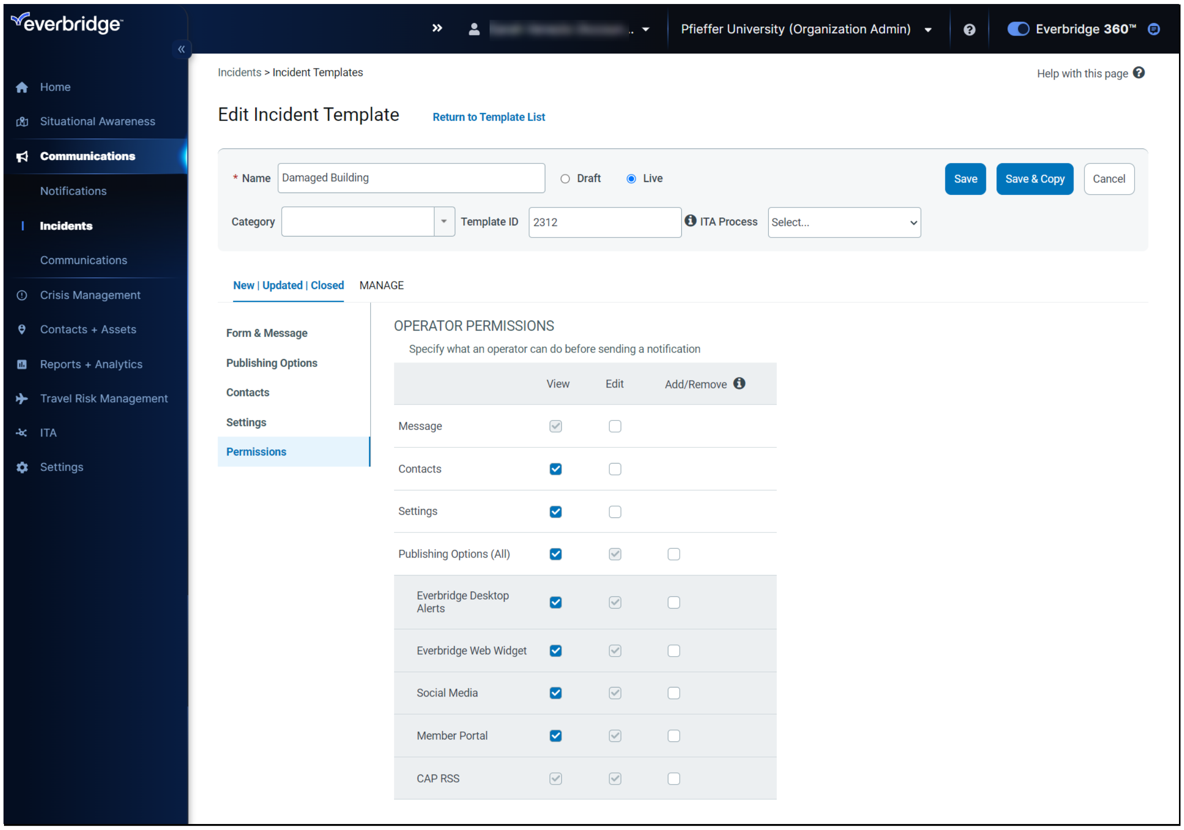
Configuring Notification Phase Permissions

In your Incident template, you can optionally change the operator permissions for a Notification phase. By default, the application uses the operator permissions from the **New** phase.

> **NOTE:** Operator permissions can be changed while adding a new Incident template.

To change operator permissions for a Notification phase:

1. From **Incidents > Templates**, click the Pencil icon next to the Incident template you want to edit.
    - You can also change the operator permissions while adding a new Incident template.
    - You must have some Notification phases configured.
2. Click the Notification phase whose permissions you want to set.
3. Click **Permissions**.
4. Change the operator permissions, as needed. See Setting Incident Template Operator Permissions.
5. Repeat Steps 2-4 for each Notification phase, as needed.
6. Click **Save**.


everbridge
Pfieffer University (Organization Admin)
Everbridge 360™
Home
Situational Awareness
Communications
Notifications
Incidents
Communications
Crisis Management
Contacts + Assets
Reports + Analytics
Travel Risk Management
ITA
Settings
Incidents > Incident Templates
Help with this page
Edit Incident Template
Return to Template List
* Name
Damaged Building
Draft
Live
Save
Save & Copy
Cancel
Category
Template ID
2312
ITA Process
Select...
New | Updated | Closed
MANAGE
Form & Message
Publishing Options
Contacts
Settings
Permissions
OPERATOR PERMISSIONS
Specify what an operator can do before sending a notification
View
Edit
Add/Remove
Message
Contacts
Settings
Publishing Options (All)
Everbridge Desktop Alerts
Everbridge Web Widget
Social Media
Member Portal
CAP RSS

Sending an Update Notification

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

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

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

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

To send an update Notification:

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

Stopping an Update Notification

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

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

Closing an Incident

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

To close an Incident from the Manager Portal, select either:

- **Close - send Notification**. This allows you to send one final Notification to the contacts. This may be information about how the situation was resolved, an all-clear, or more generalized closure.
    1. Select **Incident** > **Open/History**.
    2. Find the desired Incident to close.
    3. Select **Actions** > **Close - Send Notification**.
    4. Click **Confirm** to confirm that you want to close this Incident. The **Close Incident** is displayed. The form is prefilled with the previous Notification's title and fields.
    5. Change the value of any field, as needed. If you have not made any changes to any values in the form. you are prompted to confirm that you want to proceed to the next page.
    6. Click **Next**. The **Incident Message** is displayed.
    7. Click **Send. Incident Details** shows the last Notification at the top of the table. In both **Incident Details** and **All Incidents** the Incident status is **Closed**.
- **Close - without a Notification**. If you select this, you are prompted to confirm that you want to close this Incident without sending a Notification. If you select **Yes**, the Incident is immediately closed without any further contact from the Organization to the contacts. You can also do this by selecting the Incidents and clicking **Close**.

Ways to Launch an Incident

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

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

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

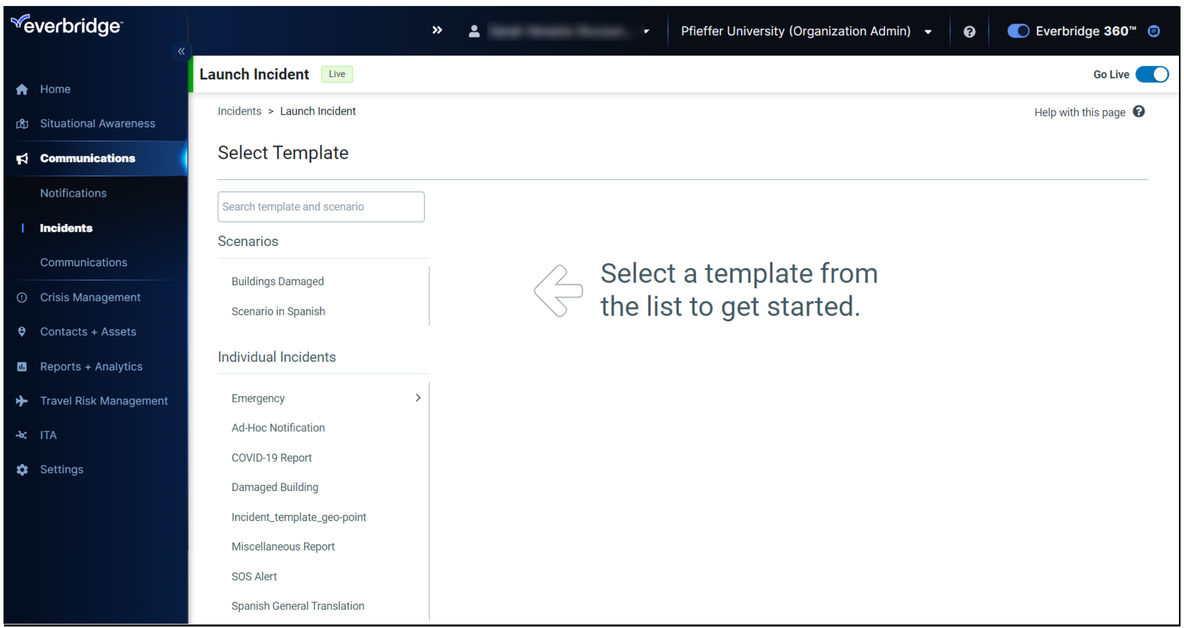
Launch by Phone	The ability to launch an Incident by phone gives you a viable alternative to launching an Incident even if you cannot access the Internet. • You must set up your Organization settings in advance to enable this. • It requires assigning a numerical ID to the template.
Launch by Live Operator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

Launching an Incident from the Manager Portal

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

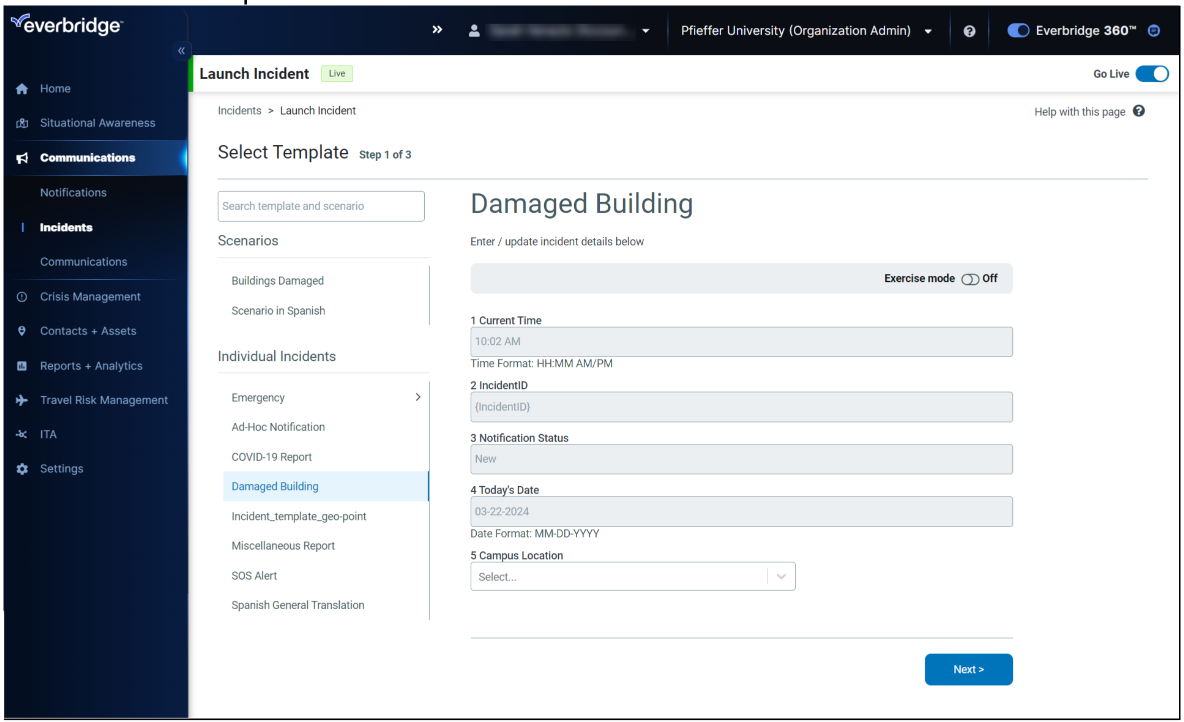
The Everbridge Manager Portal is accessed online through a web browser.

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



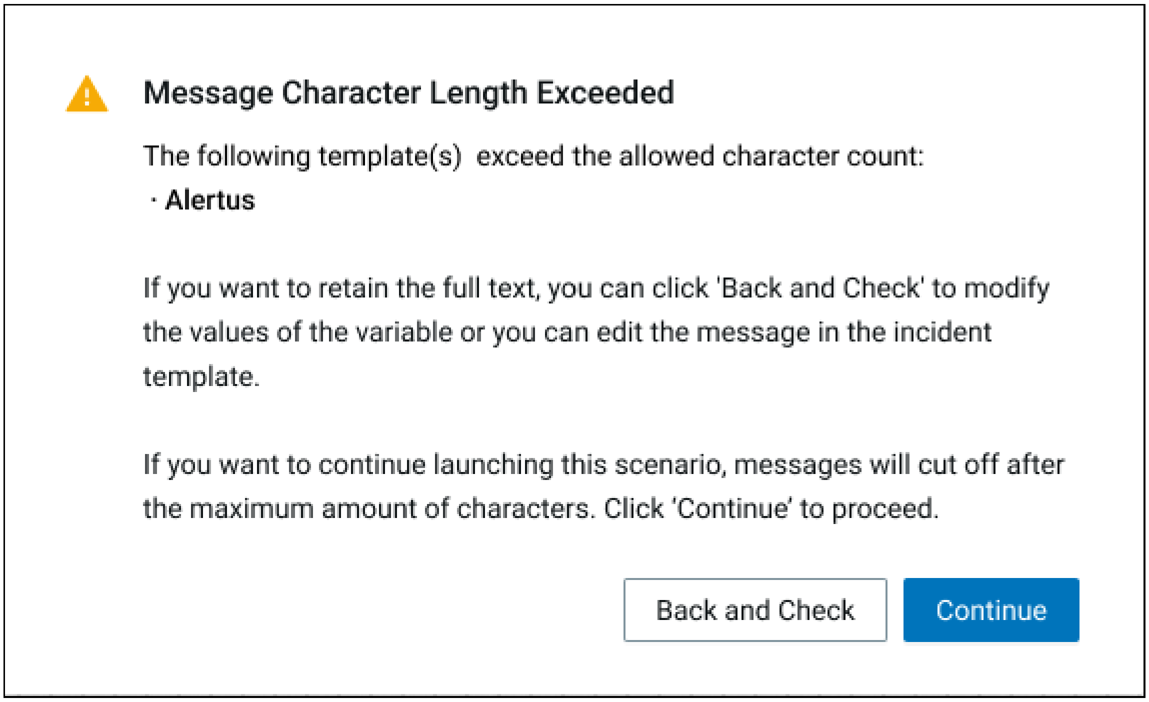
2. Select the desired Incident template by clicking its name. The **Template Form** displays. If your Incident template is not displayed, it could be because you need to change the status of the Incident template to **Live**, or you may need to add this template to your role. If this is a scenario, then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

all included templates with one click.



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

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



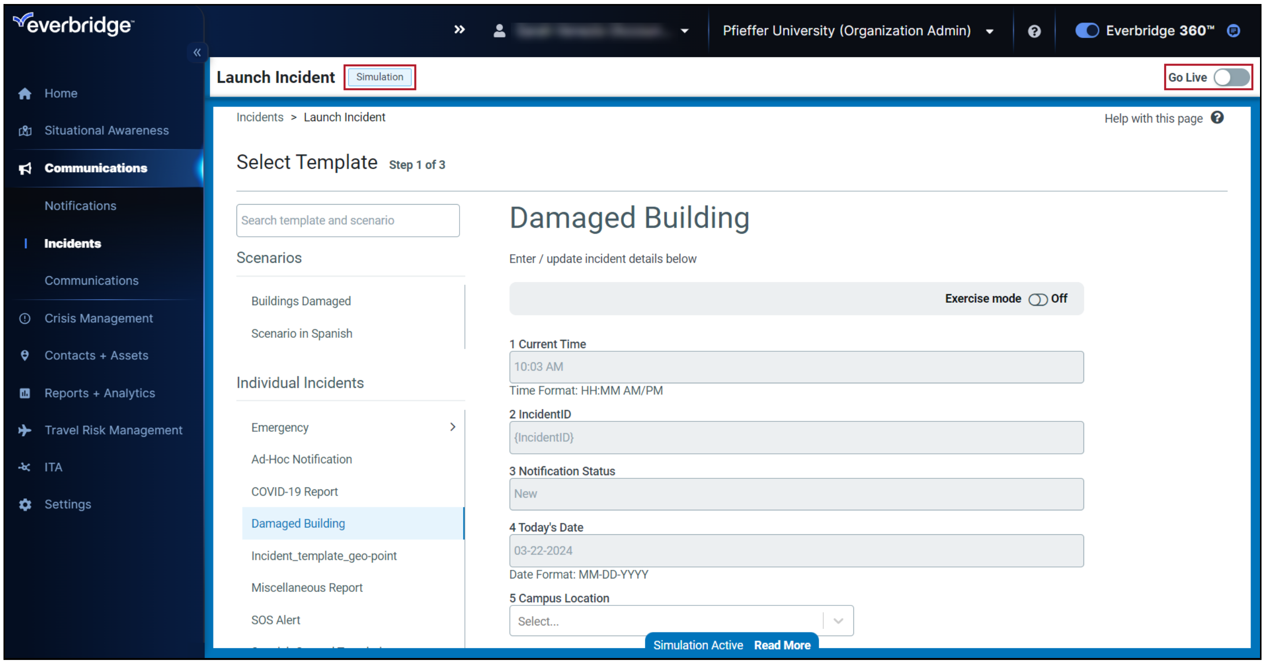
Simulation Mode

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

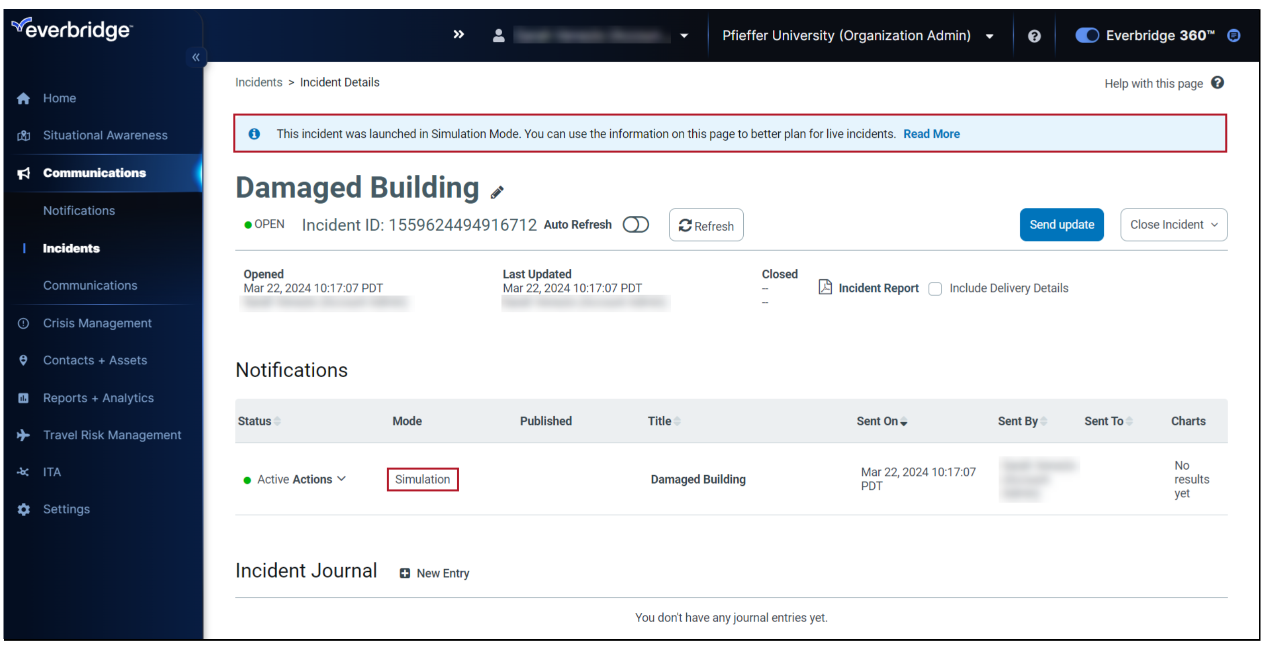
This feature is disabled by default and needs to be enabled by an Account or Organization Admin under **Settings** > **Organization** > **Notifications** > **Default Options**.

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

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

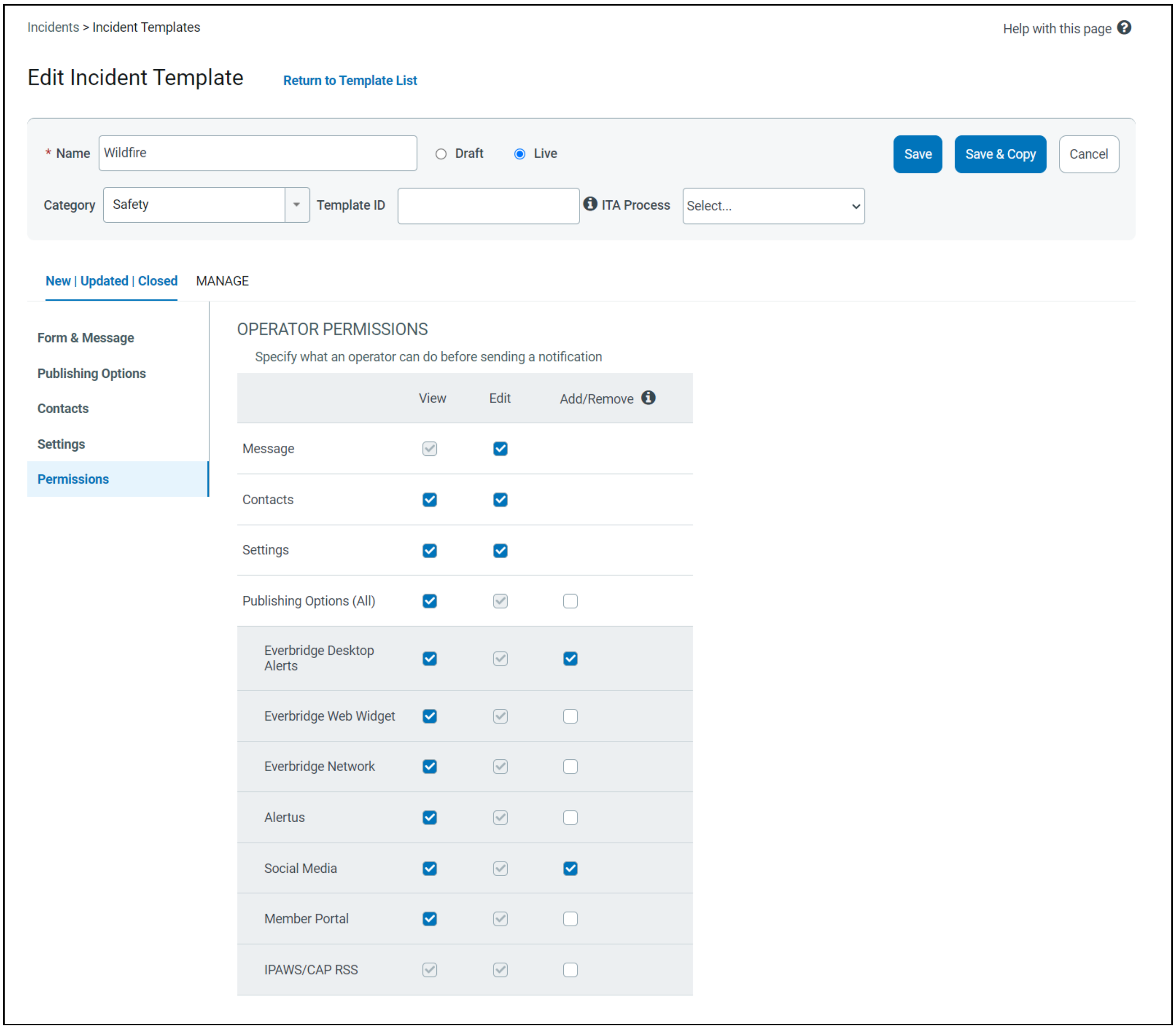


Incidents that were sent in Simulation Mode will be specified as such under the **Mode** column on the **Incident Details** page. The banner at the top will also state that this was sent in Simulation Mode.

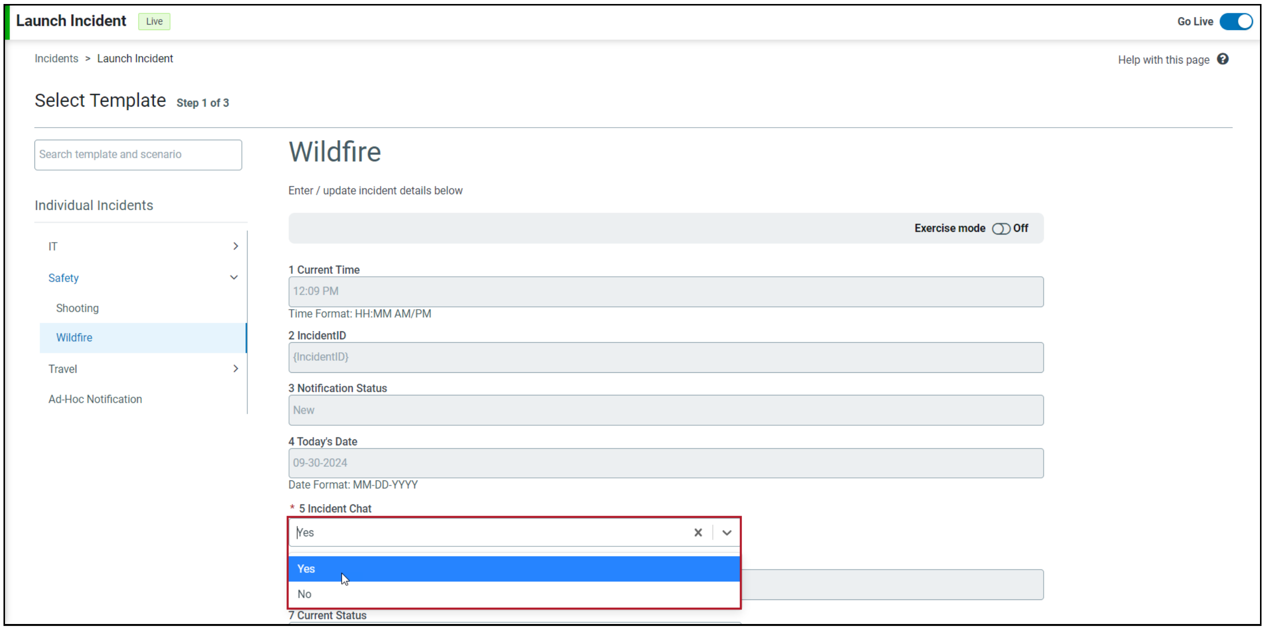


Launching a Chat-Enabled Incident

Since the Incident chat field is part of the Incident settings, it is available to the user launching the Incident Notification based on the template's operator permissions.

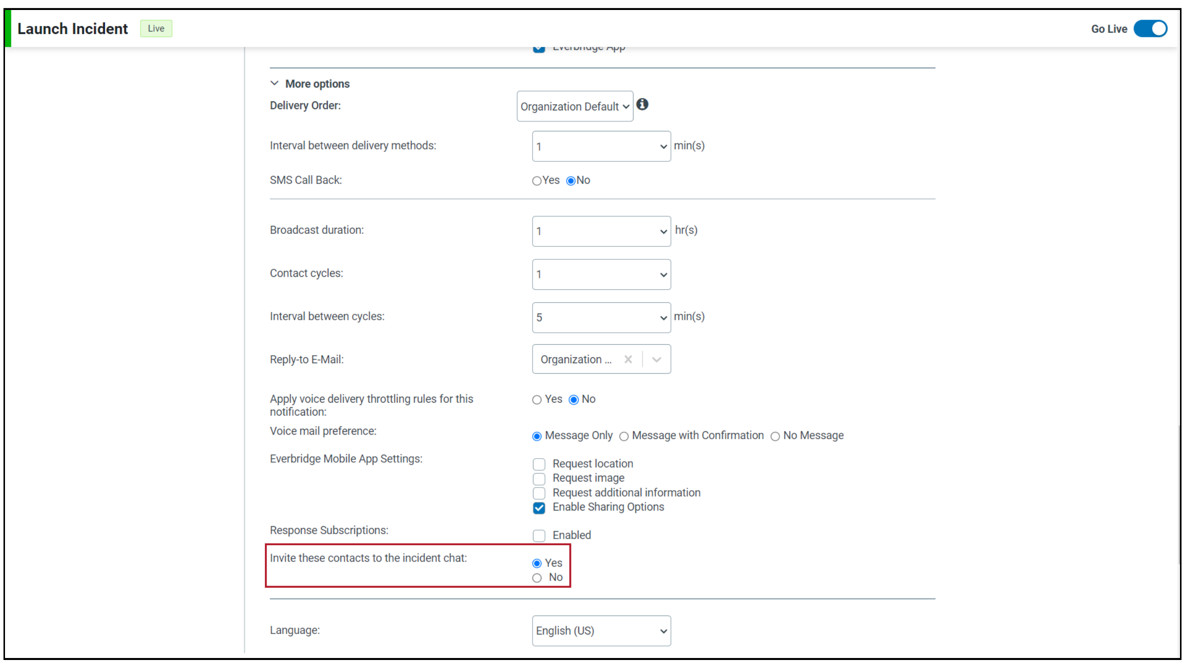


If conditional settings are applied to the template, the values selected for the variables will determine whether the selected contacts are invited to the Incident chat.



Launch an Incident by performing the following steps:

1. If the operator permissions allow the user to modify the settings at the time they are launching the Notification, the user can determine whether to invite the selected contacts at the time of launch.



2. Make sure the **Mobile Push Alert** delivery method is selected for the Incident Template. This will ensure the notification is delivered to the contacts via the Everbridge Mobile App.

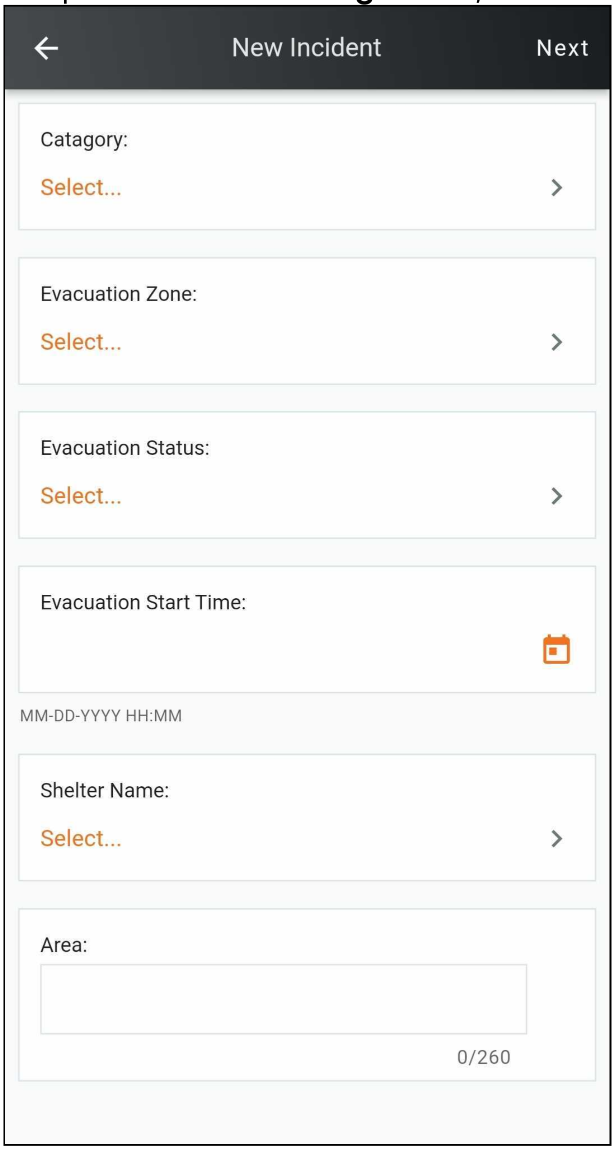
Launching a New Incident From ManageBridge

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

To launch a new Incident from ManageBridge App:

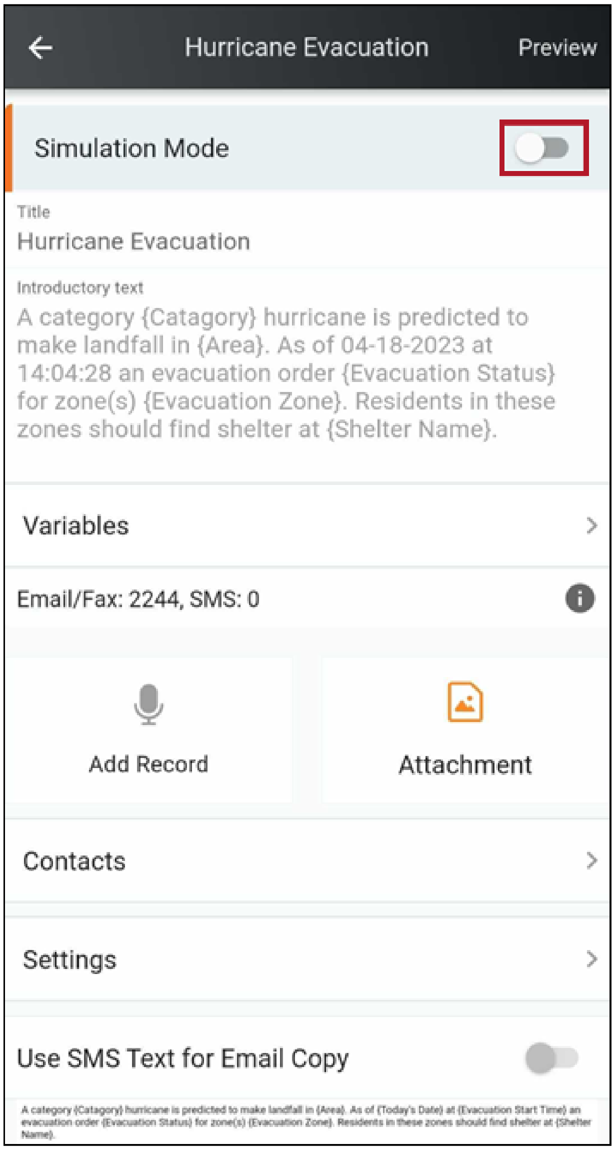
1. Tap the **Incidents** tile from the home menu. You'll arrive in the **Incidents** section.
2. Select an **Incident Template** under the **Templates** tab. Note that this differs from the desktop version of the Manager Portal in that a template **must** be selected when sending an Incident from ManageBridge.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

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



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

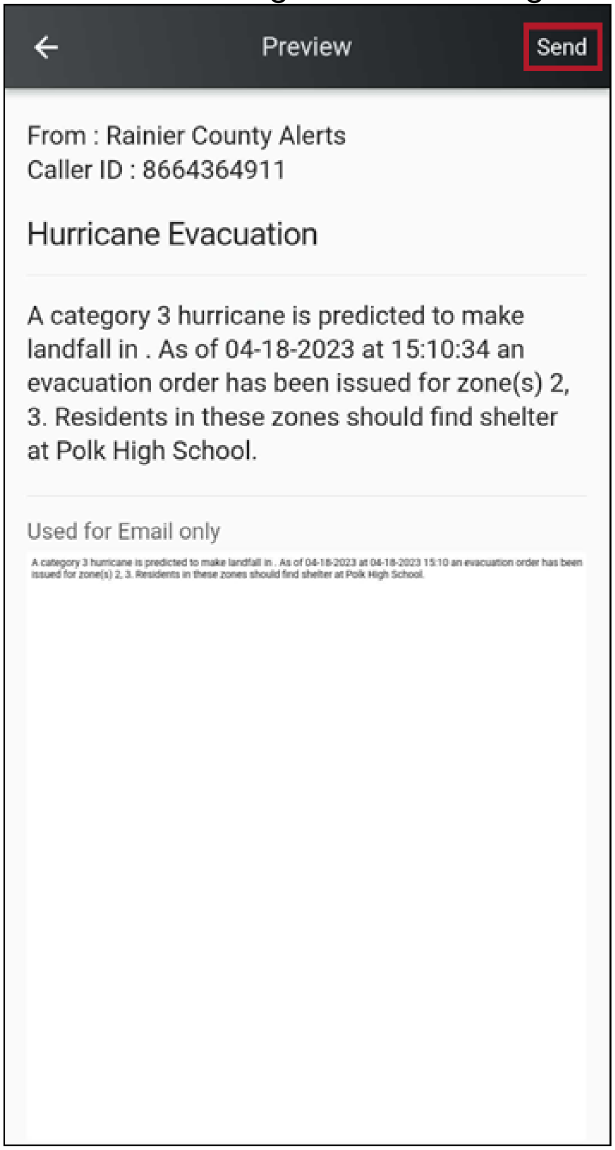
the **Simulation Mode** button **ON** at the top of the page.



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

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

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



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

Completing the Incident Notification Template Form

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

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

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

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

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

Completing an Incident Notification Message

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

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

Configuring Message

To edit a message:

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

        - are displayed with a warning icon

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

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

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

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

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

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

3. You can use the same text for all your delivery methods or you can choose to have separate text for SMS, fax, pager, text-to-speech, and email. Everbridge recommends you always send custom messages per delivery method, if possible. This helps to avoid message fatigue and enables contacts to consume messages in the most efficient way possible, per device.
   - **Use custom SMS Message** - by default, the same text is used for SMS, fax, pager and text-to-speech. If you want to use a separate SMS message from fax, pager and text-to-speech, select **Use custom SMS Message**. Text is limited to 160 characters.
     - If your Organization has enabled a message prefix, select **Message Prefix**. The prefix appears as the first item in your SMS message. Your Organization configures the prefix, and the number of characters counts against the 160 character limit.
     - Optionally, select **Add Web Page Message**. When this check box is selected, a link is added to the end of your SMS to view your Web Page message. Type and format your Web Page message.

Button/ Icon	Description

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

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

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

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

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

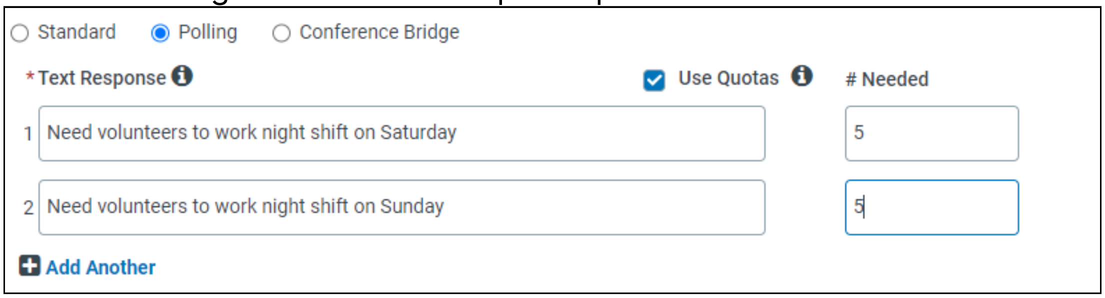
  > **CAUTION:** The file cannot exceed 2.4 MB; otherwise, you must reduce the file size and upload it again.

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

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

     > **NOTE:** For your polling message type, in **Settings**, know that the **Voice Mail Preference** and **Confirm** panes are replaced with the **SMS Call Back** pane. In this pane, when the **SMS Call Back** check box is selected, the SMS recipients are provided with a number to call and make their polling selection. If the **SMS Call Back** check box is clear, the SMS recipients are presented with a menu to select their polling choice directly from the device.

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



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

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

- **Conference Bridge**. The contact is able to connect to a conference bridge upon receiving the Notification. This could be an emergency where contacts need to discuss the situation immediately. Or, it might be a convenient way to pull everyone together for the weekly status meeting. See Using a Smart Conference Bridge from an Incident.

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

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

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

Option	Description
Everbridge Desktop Alerts	Send a Standard message as a full-screen Notification sent directly to your recipients' desktops.
Everbridge Network	Post your Notifications to the Organizations and or areas you have indicated.
Everbridge Web Widget	Configuring an Everbridge Web Widget URL, you can send a Notification to your designated website.
Alertus	Provides a way for personnel to relay important emergency alerts through **Alertus**, an Everbridge partner providing desktop alerts, alert beacons, and digital signage.
Web Posting	To initiate Notifications to partner systems or client-side web sites, you can provide one or more URLs. Optionally, provide a corresponding username and password for each URL.
Social Media	Post your Notifications to Twitter and/or Facebook accounts. Select the linked accounts from the drop-down lists. (The accounts are linked in **Settings** > **Organization** > **Publishing Options** > **Social Media**.) Twitter supports 280 characters. If your message text is longer, Everbridge posts only the first 280 characters to Twitter.
CAP - IPAWS Wireless Emergency Alerts (WEA)	See the IPAWS User Guide.
CAP - IPAWS Emergency Alert System (EAS)	See the IPAWS User Guide.
CAP - IPAWS COG-to-COG (CAPEXCH)	See the IPAWS User Guide.

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

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

Selecting Contacts

To configure your contacts:

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

   If you are an Account Administrator using the **Account's Notifications** tab, you can select the Organization name from the drop-down list. This allows you to select contacts across Organizations.

   - **Individuals**. Click **Individuals** to select individuals by name.
   - **Groups**. Click **Groups** to select groups your Organization has created. Sequenced Groups are indicated by the Sequenced Group icon (silhouettes and arrow). The order of the contacts in the Sequenced Group is the order in which they will be contacted. If there are two Sequenced Groups, for example, contact #1 from each group is notified in parallel, then after the listed wait time, contact #2 from each group is sent the Notification, and so forth. When the number of replies is met, no other contacts are notified.
   - **Rules**. Click **Rules** to apply rules your Organization has defined to select contacts with certain attributes. Rules are preconfigured by your Incident Administrator.

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

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

Option	Description
Send to linked calendar for all selected groups	If the groups you selected are linked to a calendar, then an Incident is sent to the contacts based on their calendar. This applies to static groups and conditional groups. (Escalation levels have their own group calendar option.) As you preview the group names, you see the individuals belonging to the groups. However, only the individuals on-shift are sent the Notification. If the calendar shift is not staffed, the Notification is sent to the entire group. This applies to all groups.

	If a group is a linked group calendar with a shift on-call that is also linked to a sequence group, then the contacts selected are those who are staffed on the shift, not the sequence group. If there is no staff on the shift at the time the Notification is sent, the sequence group contacts are used.
Send to Incident subscribers	If you have configured Incident subscriptions and included the identical variables in your Incident template, then, when the Notification is sent, the Incident includes the subscribers as well as the contacts in the template. Subscribers can be from the Manager Portal and the Member Portal. When this sending option is selected, you can also send follow-up Notifications.
Use map shape as an Incident Zone	All contacts who are in or enter the area defined by your shape files receive this message.
Sequencing	If your Organization has enabled **Sequenced Groups**, you can take advantage of sequenced groups (where your contacts are sent a Notification, in order, until a specified number of contacts has replied). If your rule uses a Sequenced Group, **Sequencing | Edit** is displayed. 1. Select **Edit**. 2. From the **Sequencing** field, toggle sequencing **ON**. 3. As needed, change the **Wait Time** (the default is five minutes). The Wait Time is the escalation time between each contact in any targeted shifts. the wait time can be adjusted to any number between 1 and 1440 minutes or a maximum of 24 hours. If there are multiple layers in the targeted shift, escalation from the last contact of a layer to the first contact of the next layer follow the escalation wait time defined in the template. 4. Set the number for the **Default Responses Needed** so that you do not need to change it each time in the template. Setting this number can also be used for groups where Sequencing is turned off, then on again. For example, if you set up a rule that uses a calendar filter with **On Shift** set to **Now**, the

	contacts returned is different each time, depending on the time of day. 5. In **Responses Needed**, enter the number of responses needed before the Notification ends. (The default is one response.) If you are using Notification escalation, the **Total Responses Needed** is dependent on Sequenced Groups and regular contacts. In other words, responses from both Sequenced Groups and normal Contacts count toward the **Total Responses Needed**. 6. Under the **Group Name**, you see how the sequenced group was added - manually or via [*Rule Name*].
Split Notification for each group	When sent, the Notification is separated for each group. For example, if you selected two groups, **Incident Details** shows two separate Notifications. Other contact types are included in a single Notification. You cannot split Notifications for **Send Follow Up** or **Scenarios**.

Editing Settings

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

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

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

Delivery Methods	Delivery methods are the ways that your contacts receive a Notification.

2. Select **More Options**.

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

Sending an Incident

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

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

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

   - Optionally, select **CLOSE Incident after a successful send** if you know there will be no updates to this Notification.
2. If your Incident Administrator has opted to add an additional Incident Notification review step to your Notifications, you can select **Review and Send** to preview and review your Incident. This allows you to quickly and easily validate that the Incident is ready to be sent. The message is displayed, as well as the distribution information. That is, the consolidated number of all contacts from individuals, groups, rules, and Incident subscribers, as well as the delivery methods. If set up by your Incident Administrator, enter a valid PIN for sending the Notification.

   If you are previewing an Incident scenario, all Incident templates for the scenario are listed in a drop-down list. You can select each template one-by-one to preview the information for the selected message. If a template has an issue, you see a message explaining the template will not be included in the launch.
3. Click **Send** to send your Notification immediately. Click **Schedule** to schedule your Notification to send at a later date.

   If you are scheduling your Notification and you click **Schedule**, you see the list of all pending schedules and the ones that could not be sent because of any errors. If you do not have permission to view all Incidents, then you only see the schedules set up by users with the same role as yours. You also have the option to delete these scheduled records from the list. If you delete a pending schedule, the Notification will not be sent.
   Click **Scheduled** to see the list of scheduled Incidents. Once an Incident is sent at the scheduled time, it is removed from the **Scheduled** list, if it has been sent successfully. The Incident is listed on the **Open/History** page.

> **NOTE:** Upon "Send", "Schedule", or "Review and Send", the message or title contains variable tokens that will be replaced for the actual value at the message delivery time. If the final delivery message character count exceeds the allowed limit, the message is truncated. If the message or title does not contain variable tokens, but the final delivery message character count exceeds the allowed character limit, the message will be delivered

truncated to 2500 characters if you click Continue to proceed. You can click Cancel to adjust the message.

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

Formatting an Email

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

As you add or edit a message, select **Include a separate message for email Notifications** and use the other text fields for plain text delivery methods such as SMS text, fax, pager, or text-to-speech conversion.

Although the toolbar appears similar to those in standard word processing applications, be aware that it offers minimal functionality compared to the formatting tools available in applications such as Microsoft Word.

The formatting toolbar was tested as follows:

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

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

- Content copied from Microsoft Office may not produce the same results as in Microsoft Office.
- Not all content copied from Web pages may be preserved in the original format if the source uses custom or proprietary HTML tags.
- Not all fonts, bullets, numbering, and indentation are supported when pasting content.

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

Other considerations include:

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

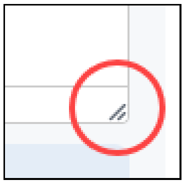
Send the Notification. (Image file sizes are excluded from the maximum **Custom Email** content size of 1 MB.)
- You must enter at least one character in the plain-text Body field even if you do not want to use those delivery methods.
- Only the content of the plain-text field appears in the **Message Body** element of all reports; the content of the **Email, Everbridge Mobile App** pane is available on all reports in a separate field.
- Ensure you select one or more Email Address delivery methods for this Notification; otherwise, the Everbridge Suite application will not send the content of your **Email, Everbridge Mobile App** pane
- If your Organization uses a custom email header and footer (in **Settings** > **Organization** > **Notification** > **Email Header and Footer**), then do not include a header and footer in the **Email, Everbridge Mobile App** pane. The Everbridge Suite application automatically inserts your custom header and footer when sending the email message.

To do this:

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

   TIP: Before sending your custom email Notification, Everbridge recommends that you send a test Notification to a small number of recipients to ensure that the Notification looks and works the way you intended.

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



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

Using Images

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

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

To do this:

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

Using Tables

The most straightforward way to enter a table is to copy/paste from an external source such as Microsoft Word. From the external source, make sure that the table column widths are the desired size because they cannot be resized once the table is pasted into the **Email, Everbridge Mobile App** pane. Alternatively, insert a table directly.

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

Converting Text to HTML

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

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

Copying Content Without Characters or Formatting Tags

If you do not want hidden characters or formatted text in your custom email when you copy/paste from an external source, you can use **Paste as Text**.

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

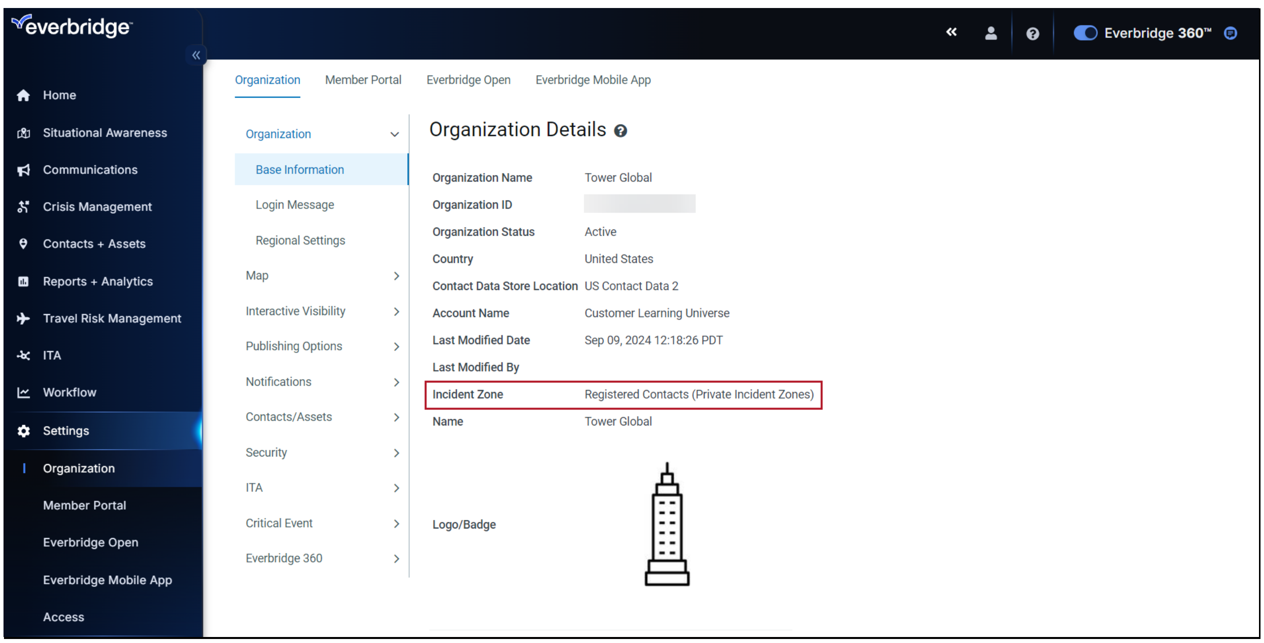
Managing Incident Zones

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

There are two types of Incident Zones:

- **Anonymous Contacts (Public Incident Zone)** - Public Incident Zones are used by State and Local Governments, where the end-user locations are anonymous.
- **Registered Contacts (Private Incident Zone)** - Private Incident Zones, a Safety Connection feature, are used to see which employees are in an impact area and message them.

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



To manage Incident Zones:

1. If available to your Organization, map your Incident Zone by placing at least one polygon on the map.
    - **Public Incident Zone** - The Everbridge Mobile Safety App delivery method is required and automatically selected for the Notification with a contact cycle value as 1, which cannot be changed. Anyone with the Everbridge Mobile Safety App in location-sharing mode will receive the

push Notification if they are either in the Incident Zone or enter into the Zone while the Zone is active.

- **Private Incident Zone** - All Org contacts will receive the Notification whose last known location is found (through Everbridge Mobile Safety App or other integrated means) inside the Incident Zone while the Zone is active. You can set the contact cycle to more than 1 for these Notifications.

> **NOTE:** Only the Standard message type can be used in an Incident Zone. Polling or Conference Bridge message types cannot use an Incident Zone.

2. Select **Use map shape as an Incident Zone**.
3. Review the following notes:
   - Public agencies using Public Incident Zones reach anyone in their shapes via the Everbridge Mobile App.
   - Private Organizations using Private Incident Zones launch an Incident to contacts registered with their Organization's credentials via the Everbridge Mobile App and selected delivery methods for that Incident.
   - If the Notification is scheduled with an Incident Zone, stopping the Notification cancels the Incident Zone broadcast.
   - While launching a Notification with the **Incident Zone** flag on, a **Confirm** dialog is displayed. The message in the Incident **Zone Confirmation** dialog differs depending if you have a private or public Incident Zone.

Using Conference Bridge Calls

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

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

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

When taking part in a conference call, Everbridge recommends:

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

Launching an Incident with a Conference Call Message Type

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

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

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

Smart Conference Maximum Participant Limit

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

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

Reviewing the Status of a Conference Bridge Call

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

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

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

Conference Bridge Call is Live

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

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

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

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

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

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

Updating a Caller in Live or Over status

To do this:

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

Smart Conference is Over

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

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

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

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

Smart Conference has Expired

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

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

Configuring Scenarios

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

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

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

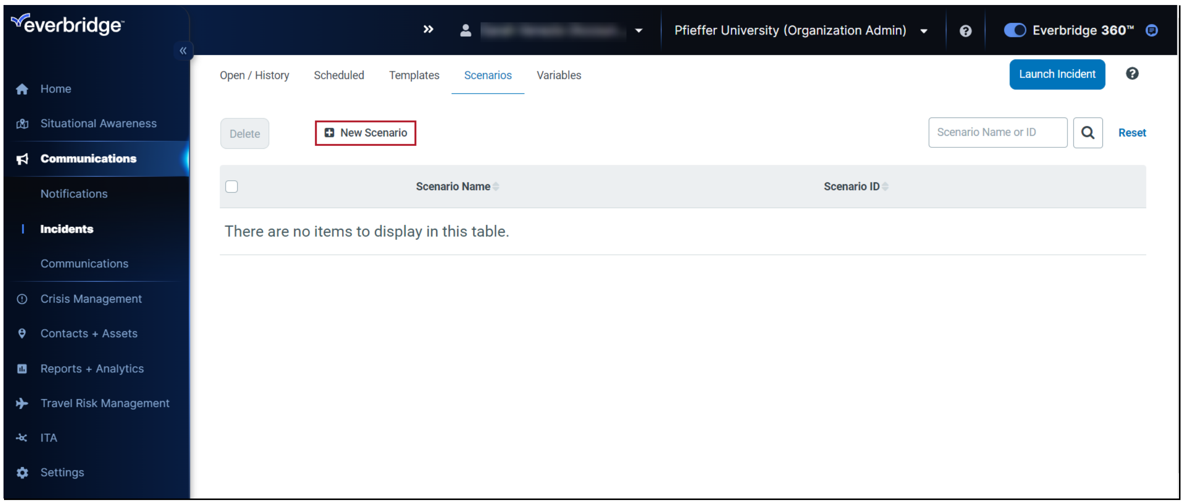
Scenario permissions and Incident template permissions are not the same. Assigning a scenario to a role does not automatically assign the individual template to the role.

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

Adding Scenarios

To add a scenario:

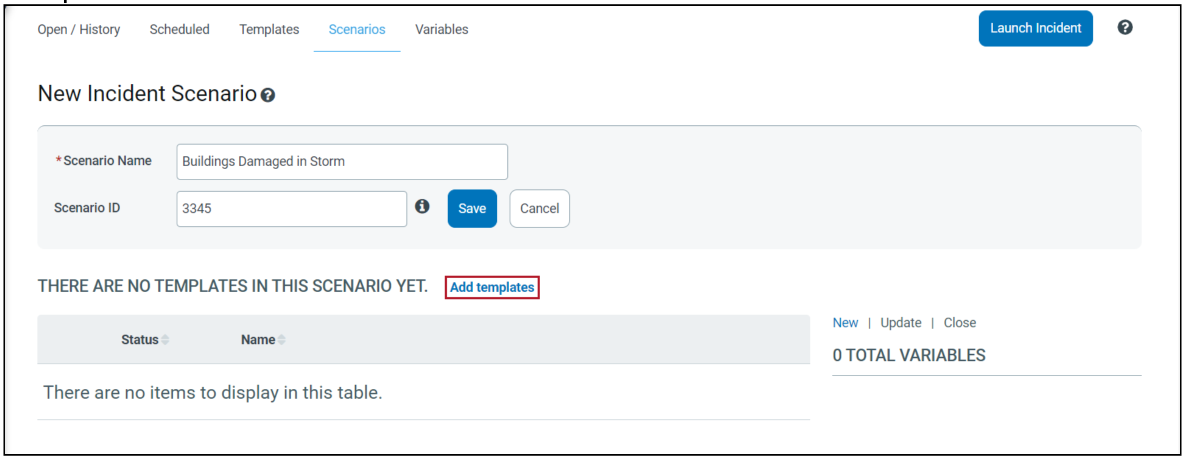
1. Ensure you have all your Incident templates created.
2. Select **Incidents** > **Scenarios**.
3. Click **New Scenario**.



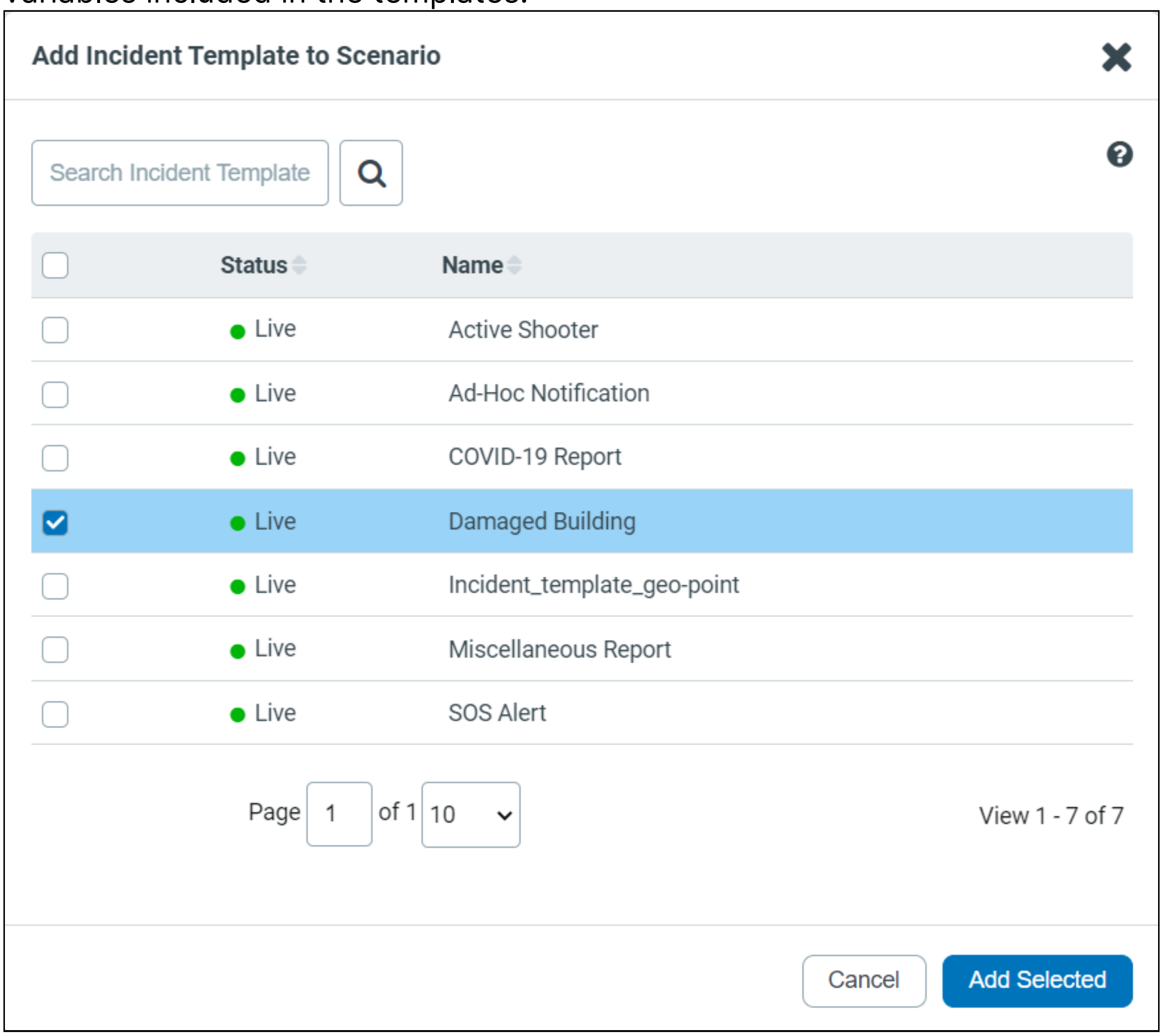
> **TIP:** If you do not want to create a new scenario from scratch, you can click **Copy** to copy an existing scenario.

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

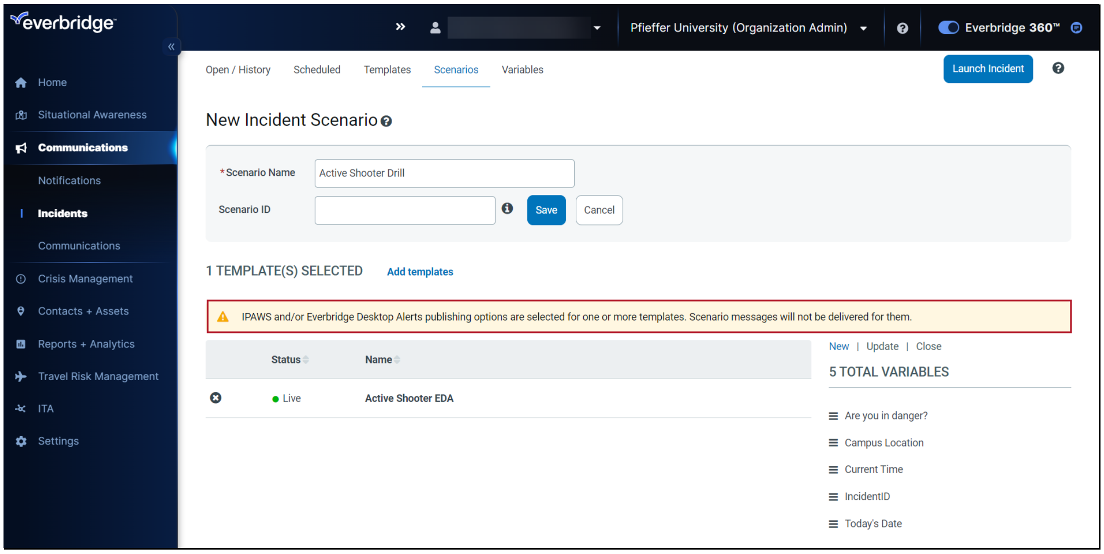
templates.



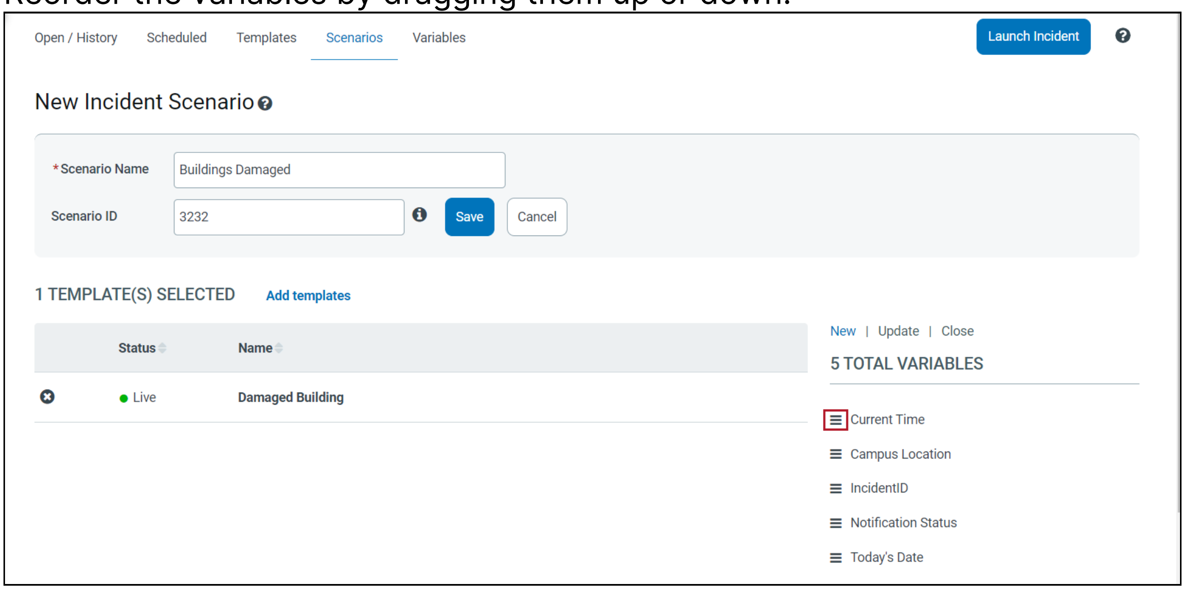
7. Optionally, search for the Incident template name you need.
8. Select the Incident templates to be included in this scenario, then click **Add Selected**. The selected templates are listed as well as the information variables included in the templates.



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



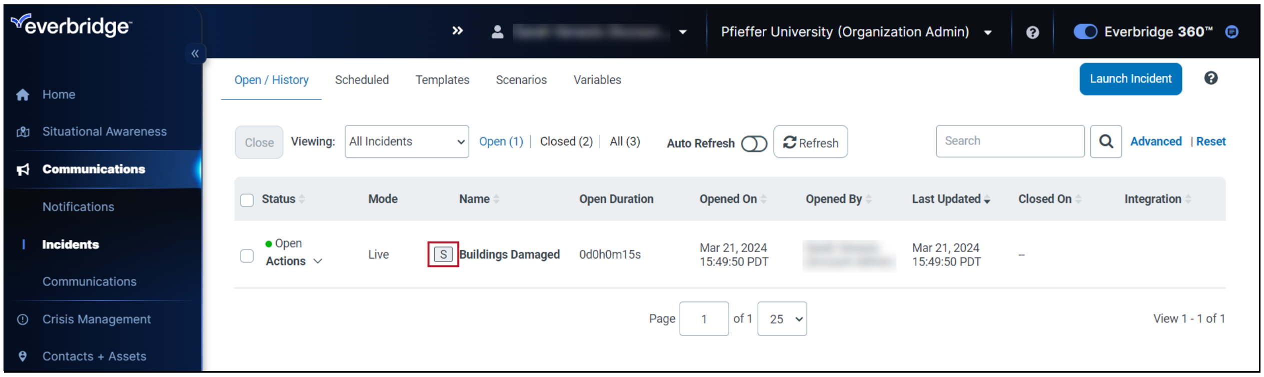
9. Reorder the variables by dragging them up or down.



10. Click **Save**.

Managing Scenarios

To view an Organization's open scenarios, select **Incidents** > **Open/History**. From the **Viewing** drop-down list, select **Scenarios**. Scenarios are displayed in the **Open/History** list view with the **S** icon.



In the same way that you can for Incident templates, you can edit, manage the phases of templates within your scenario, or delete your scenarios at any time.

Editing Scenarios

To edit scenarios:

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

Deleting Scenarios

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

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

Managing Scenario Phases

Some situations do not resolve immediately and require more communication than a single initial message. You can send additional messages for any open Incident by sending an update Notification. An update Notification sends another Incident Notification to the contacts with content modified to reflect the changing situation. See Sending an Incident Update Notification.

Once a situation or crisis is over, each Incident Notification in a scenario should be closed. Each individual Incident in a scenario may be closed:

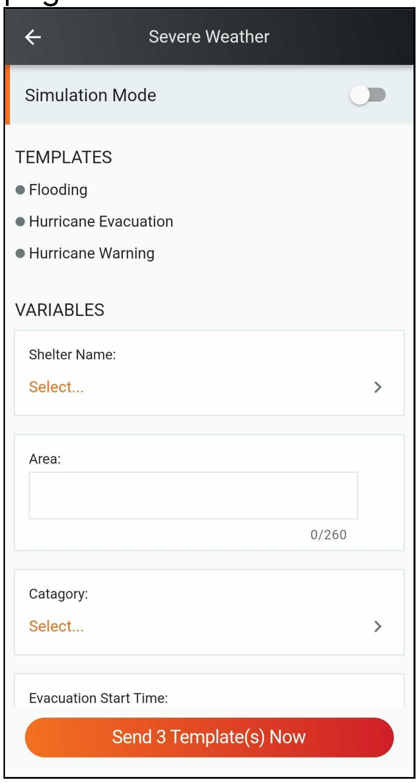
- manually without a final Incident Notification
- manually with a final Incident Notification
- or may have been closed in a previous Incident Notification based on a template's configuration.

See Closing an Incident for more details.

Launching a Scenario from ManageBridge

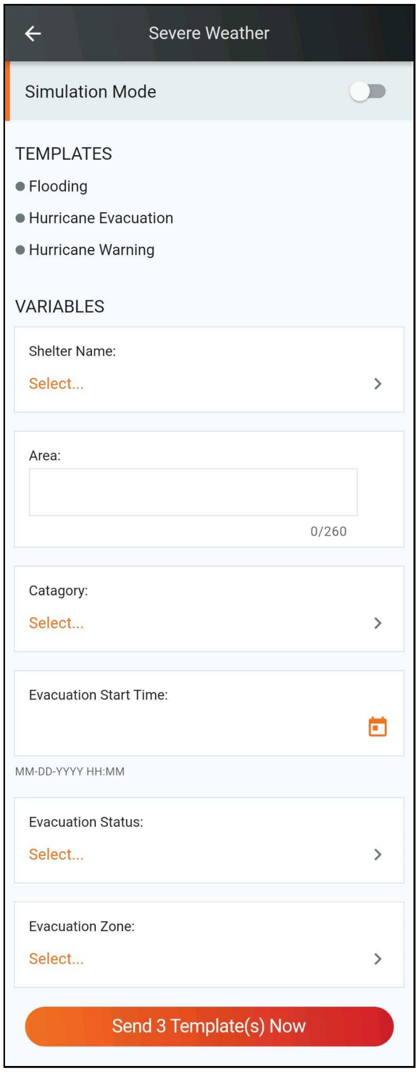
To launch a Scenario:

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



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

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



5. Tap **Send**.

Auto-Translating Scenarios

If you are using scenarios, you can have your Incident message auto-translated. Everbridge uses Google Translate to do this. While Auto-Translate is helpful when time is of the essence and native speakers are not available, it is not a perfect translation, Everbridge recommends human translations whenever possible.

Refer to Supported Languages in Everbridge Suite for more a full list of supported languages.

> **NOTE:** Google supports English and Spanish, but not English (UK), English (US), Spanish (Europe), or Spanish (Latin America).

When auto-translating, you need to:
1. Configure the variables you want to translate. See Adding an Auto-Translated Information Variable.
2. Configure an Incident template that includes the variables from Step 1. See Adding an Auto-translated Information Template.
3. Configure a scenario that is made up of the Incident templates from Step 2. See Creating an Auto-Translated Scenario.
4. Once, you have configured your information variables, templates, and scenario, you can launch your auto-translated scenario.

Adding an Auto-Translated Information Variable

To add an auto-translated information variable:
1. Select **Incidents** > **Variables**.
2. Select **New Variable**.
3. From **Type** drop-down list, select **Textarea**.
4. In **Name**, type a name for your variable, in the format ***variable - LanguageName***, where *LanguageName* is a language you want translated to/ from and [space]-[space] is how the variable is recognized as a translation variable. You can use any variable name, but to create a translation set, the prefix variable must be the same. For example, you could have:
    - **Title - English**
    - **Title - Spanish**
    - **Title - French**
    - **Message - English**
    - **Message - Spanish**
    - **Message - French**

and so on.

5. Click **OK** to save the variable.
6. Repeat Steps 2-5 for each language you want translated. Each translation variable must be added to the template.

Adding an Auto-translated Information Template

To add an auto-translated information template:

1. Select **Incidents** > **Templates**.
2. Select **New Incident Template**. You should create a template for each language that you want. You should identify which template is for each language by naming them appropriately, for example, **EN: General Translation**, **ES: General Translation**, **FR: General Translation,** and so on.
3. Add the auto-translated information variables that you created to your Incident template. To manage the information variables for the Organization, see Using Information Variable Tokens.
4. Configure the template details. See Creating Incident Templates.
5. Scroll or use **Search**, to locate the information variables you want. For example, search for **Message**.
6. Add the rest of the information variables you need. See Adding Information Variables.
7. Click **Preview**, and make sure your variables appear as you determined earlier.
8. Click **OK** to close the **Preview** dialog.
9. In **Preview & Edit**, click **Outgoing Message**.
10. Create your message. See Form & Message.
11. Click **Preview** and make sure your message is the way you want it.
12. Click **OK** to close the **Preview** dialog.
13. Configure **Publishing Options**, see Publishing Options.
14. Configure **Contacts**, see Contacts.
15. Configure **Settings**, see Configuring Incident Template Settings.
16. Configure **Permissions**, see Setting Incident Templates Operator Permissions.
17. Click **Save** to save the template. Your template is listed alphabetically.
18. Add your template to a scenario.

Creating an Auto-Translated Scenario

To create an auto-translated scenario:

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

4. In **Scenario Name**, type a unique name where the last word is **Translation**. For example, **Team Alert - Translation** or **Internet Problem - Translation**.
5. Add your Incident templates. See Adding Scenarios.
6. Select the check boxes of the Incident templates to be included in this scenario, especially the auto-translate variables that start with **trans-**.
7. Click **Add Selected**. The selected templates as well as the information variables included in the templates are listed.
8. Click **Save**. The **Scenarios** page lists the scenario, the number of templates in the scenario, and the Scenario ID if available.

Launching an Auto-Translated Scenario

To launch an auto-translated scenario:

1. From the **Incidents** tab, click **Launch Incident**.
2. Select your auto-translate scenario. The right-hand pane displays the variables for you to fill in and the templates in the scenario.
3. Select **Read before using and read the Translation Services Disclaimers**.
4. Click **OK** to close the **Translation Services Disclaimers** page.
5. Fill in any required fields.
6. Also, if you want English translated to other languages, fill in the **trans-English** field and click **Translate**. Your translation is shown in the text boxes of the other languages.
7. Click **Send**.
8. From **Incidents** > **Open/History**, select **Scenarios** from the **Viewing** drop-down list to see the status of your scenario.

Example of Sending Automatic Message Translations to Different Contacts

To send contacts a message in their preferred language:

1. Make sure your contacts have an indicator of their language (by means of **Additional Information** or **Alert** options).
2. Create rules to select contacts, one rule per language.
3. Create the following two information variables per language:
    - **Subject - *LanguageName***, such as **Subject - English** or **Subject - Spanish**.
    - **Body - *LanguageName***, such as **Body - English** or **Body - Spanish**.
4. Per language, create an Incident template using only the two information variables from the previous Step.
5. In the Incident template, make sure the template:
    - has the proper dynamic token for filling in the subject and body in the message
    - selects the proper rule for the language

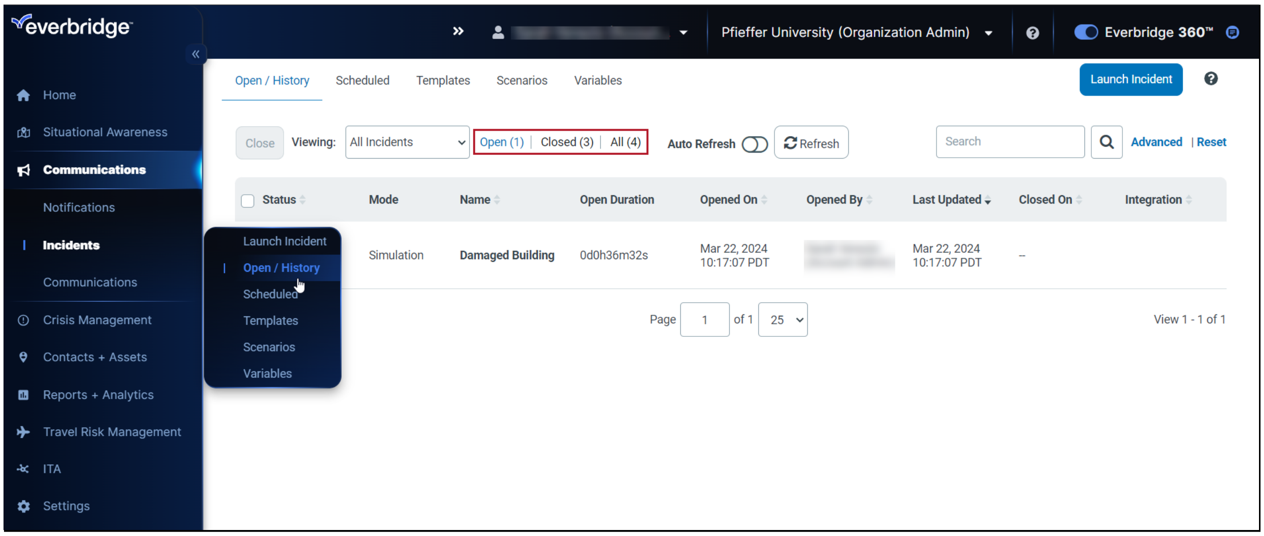
- has the proper language selected in the **Incident Settings** > **Language**

6. Repeat Step 4 for each language.
7. Create a scenario using all your templates. (Remember that the name must end with the word **Translation**.) This is what you will see listed in the results every time the scenario is used.

Managing Incidents

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

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



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

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

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

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

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

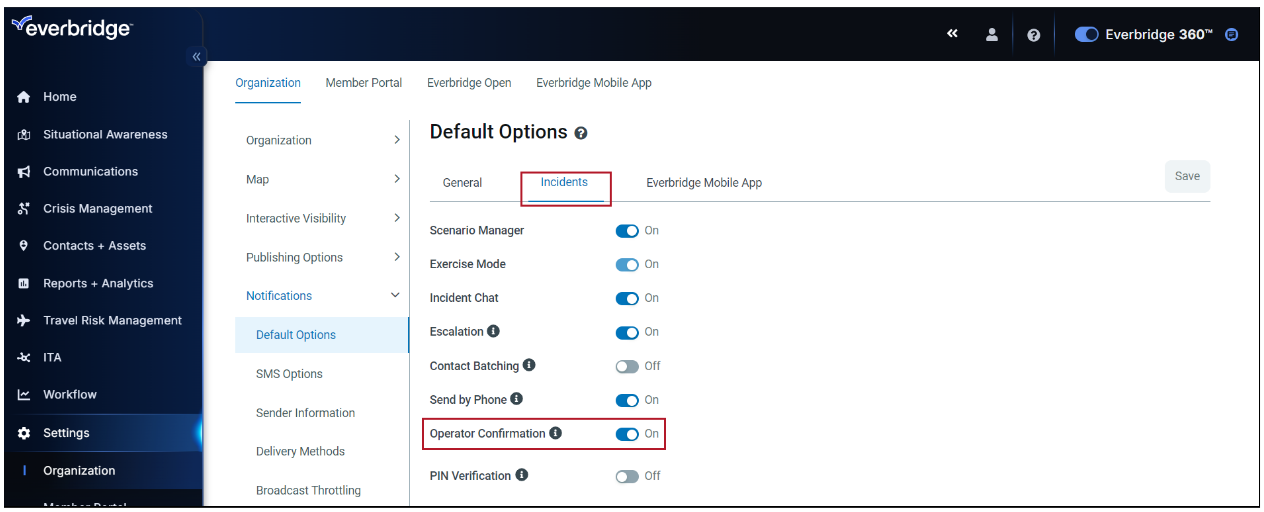
You can change the sort order of the table by clicking on the column headings.

Confirming Message Receipt on Behalf of Recipients

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

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

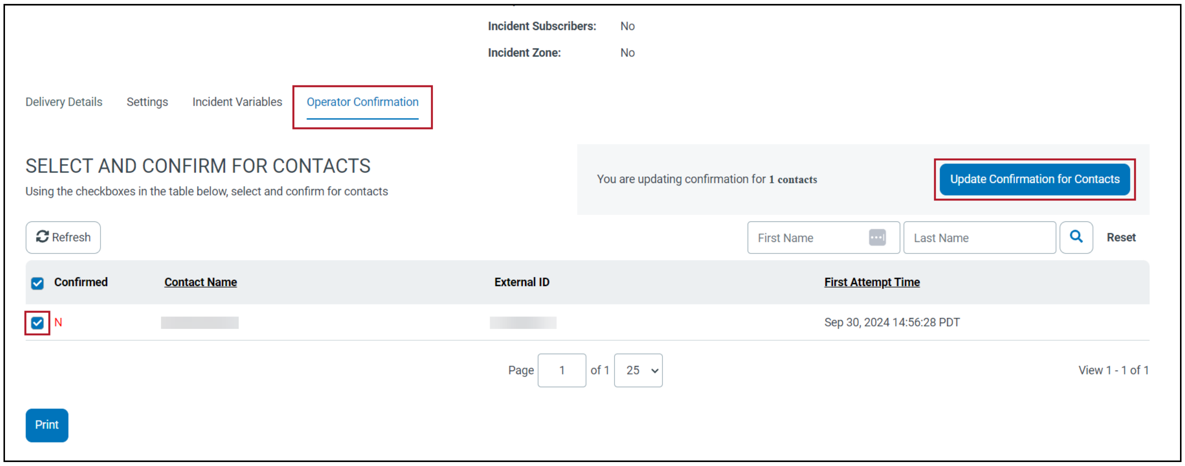
This feature can be enabled at the Organization Level by an Administrator from **Settings** > **Organization** > **Notifications** > **Default Options** > **Incidents**.



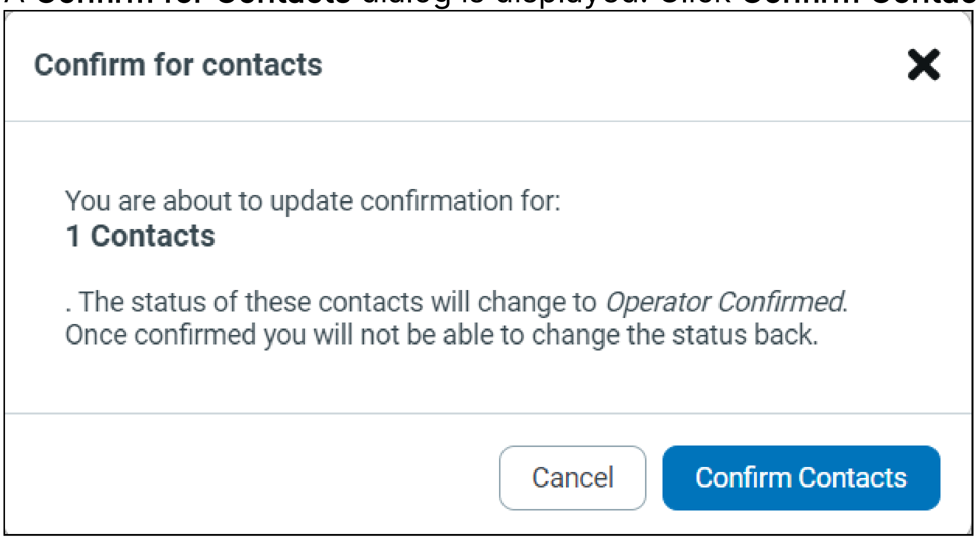
To confirm message receipt on behalf of recipients:

1. From the **Incident Details** of the Notification, click the name of the Notification.
2. Scroll to the bottom of the page and click the **Operator Confirmation** tab.

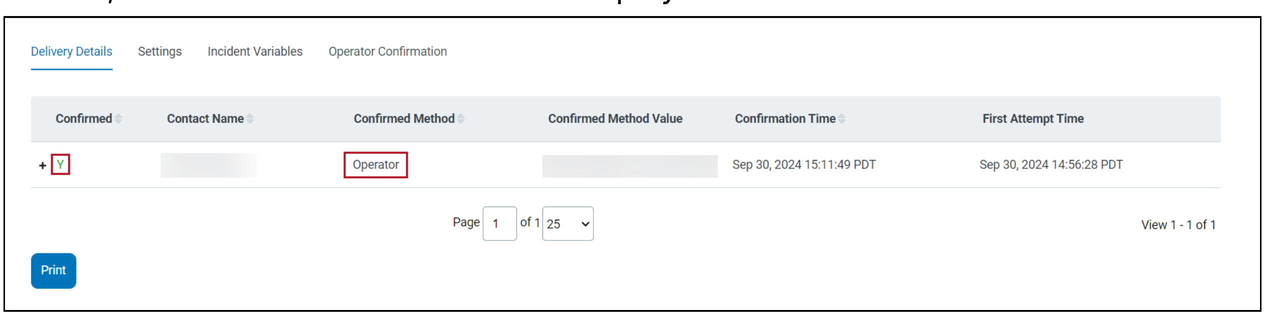
3. Select the names to confirm on behalf of the contacts, then click **Update Confirmation for Contacts**.



4. A **Confirm for Contacts** dialog is displayed. Click **Confirm Contacts**.



The contacts you have confirmed will no longer be displayed on the **SELECT AND CONFIRM FOR CONTACTS LIST**. Instead, you will see their names on the Delivery Details, where the **Confirmed** column displays **Y**.



Sending an Update Notification

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

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

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

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

To send an update Notification:

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

Stopping an Update Notification

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

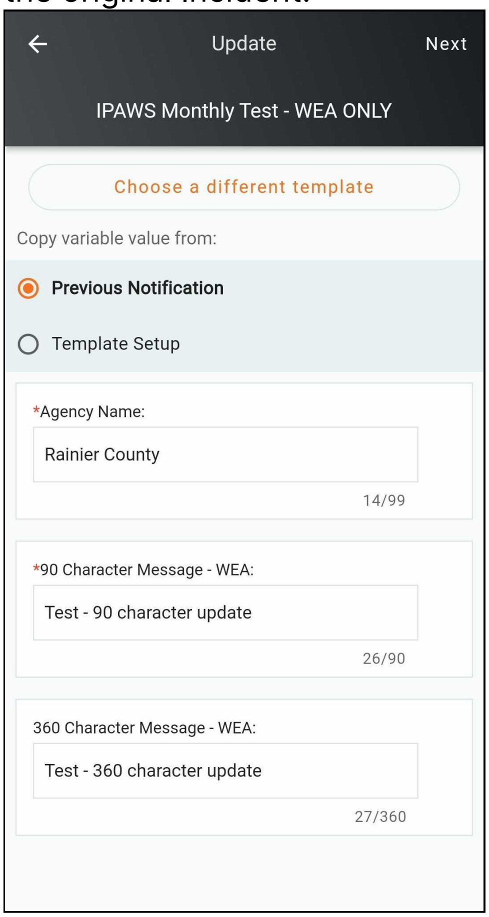
1. Select **Incidents** > **Open/History**.
2. Select the Incident name whose Notification you want to stop. The **Incident Details** page is displayed.
3. Select **Actions** > **Stop**.
4. Click **Yes** to stop the Notification. Stopping a Notification does not affect messages that have already been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

Sending an Incident Update Notification in ManageBridge

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

To send update messages via ManageBridge:

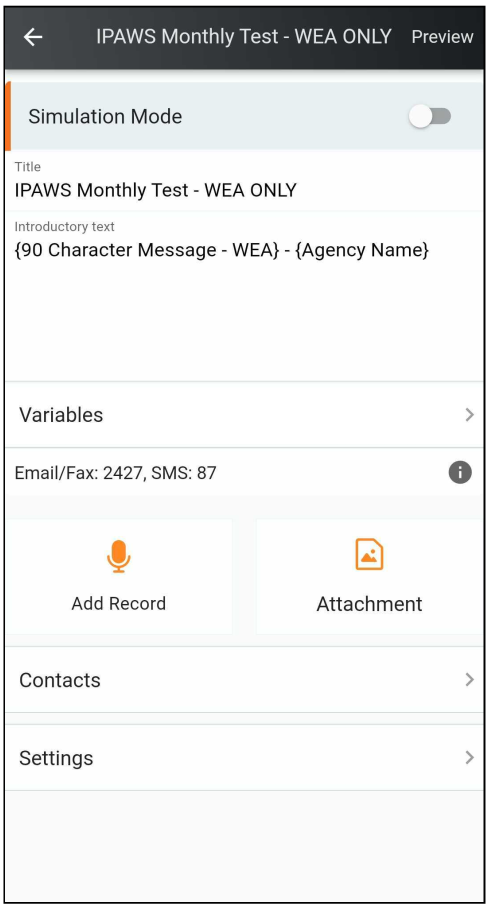
1. From **Incidents,** tap on the name of the Incident in question.
2. Tap **Send Update**. The **Update Incident** screen appears. If needed, you can select a different Incident Template for the follow-up than what was used for the original Incident.



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

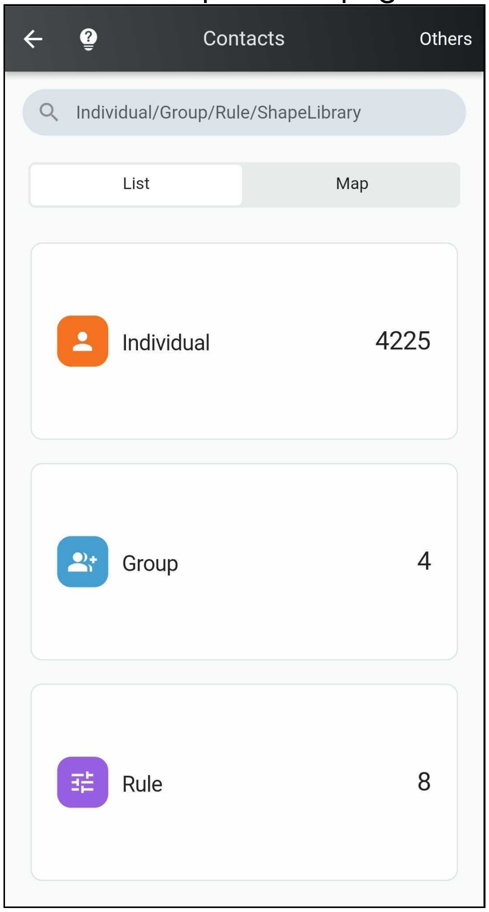
- Required fields are indicated with *.
- There might be spinner lists offering solutions from which you select a value. The values and their order are defined by your administrators. Select the desired value and tap **Confirm**.

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

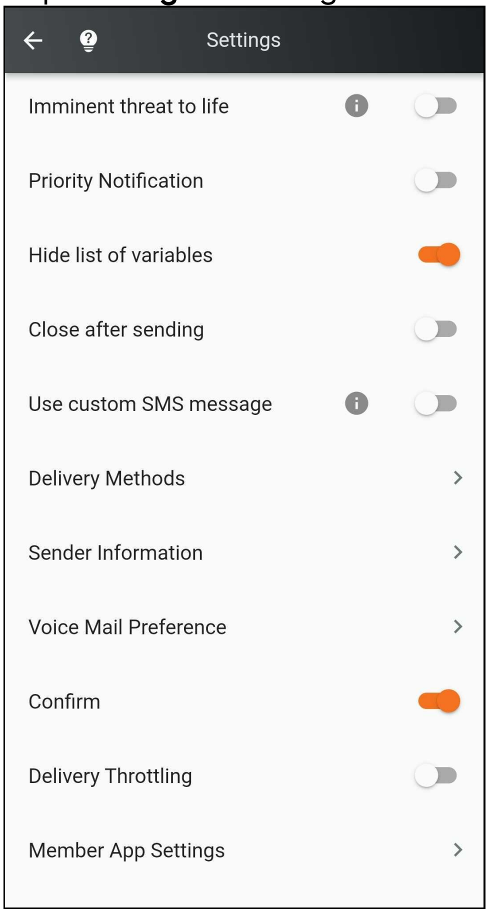


6. Tap **Contacts** to specify who should receive the follow-up by Individuals, Groups, Rules, or the Map. Once they've been chosen, tap the back arrow to

return to the previous page.



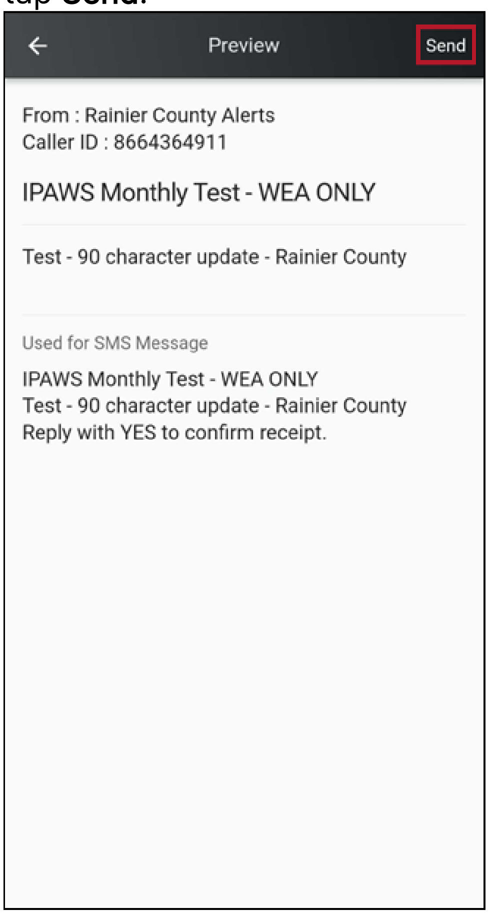
7. Tap **Settings** to configure the following preferences:



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

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

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



Closing an Incident

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

To close an Incident from the Manager Portal, select either:

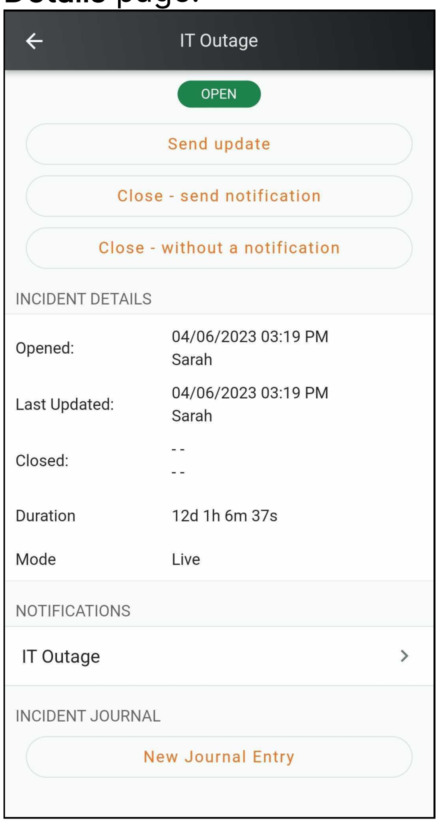
- **Close - send Notification**. This allows you to send one final Notification to the contacts. This may be information about how the situation was resolved, an all-clear, or more generalized closure.
  1. Select **Incident** > **Open/History**.
  2. Find the desired Incident to close.
  3. Select **Actions** > **Close - Send Notification.**
  4. Click **Confirm** to confirm that you want to close this Incident. The **Close Incident** is displayed. The form is prefilled with the previous Notification's title and fields.
  5. Change the value of any field, as needed. If you have not made any changes to any values in the form. you are prompted to confirm that you want to proceed to the next page.
  6. Click **Next**. The **Incident Message** is displayed.
  7. Click **Send. Incident Details** shows the last Notification at the top of the table. In both **Incident Details** and **All Incidents** the Incident status is **Closed**.
- **Close - without a Notification**. If you select this, you are prompted to confirm that you want to close this Incident without sending a Notification. If you select **Yes**, the Incident is immediately closed without any further contact from the Organization to the contacts. You can also do this by selecting the Incidents and clicking **Close**.

Closing an Incident in ManageBridge

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

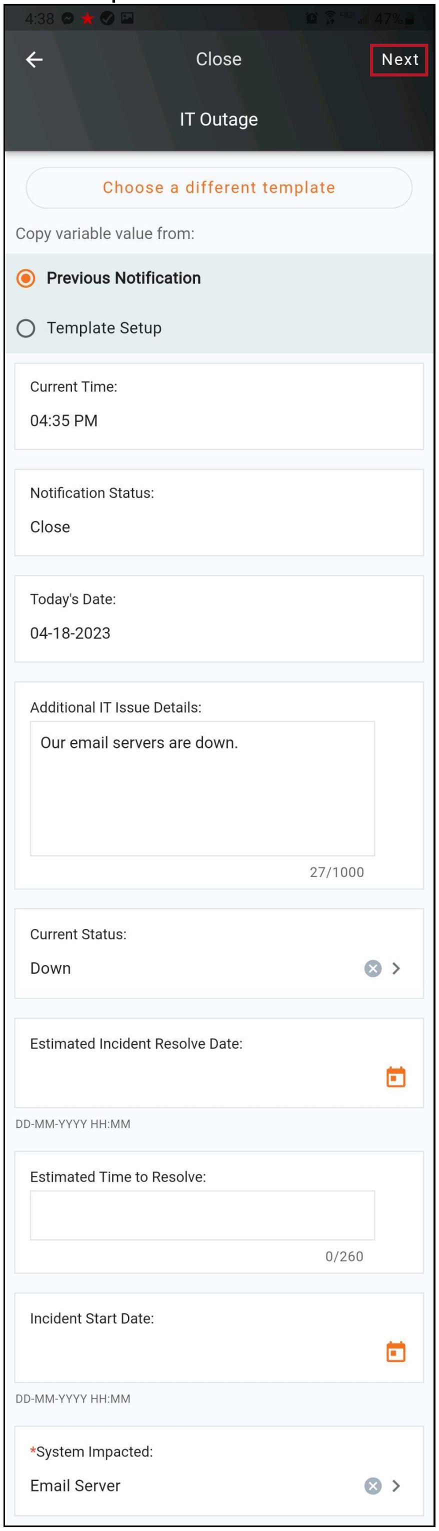
Closing With a Notification

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



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

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



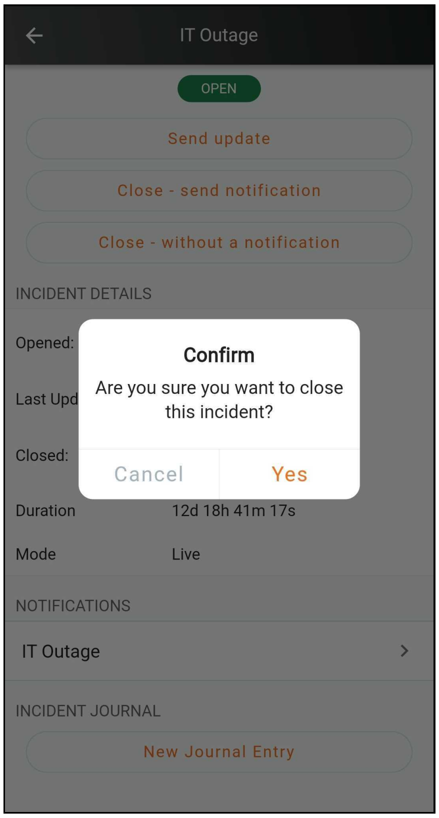
4. On the next page, you can:
    - Enable Simulation Mode
    - Review used variables

- Add a voice recording
- Add an attachment

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

Closing Without a Notification

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



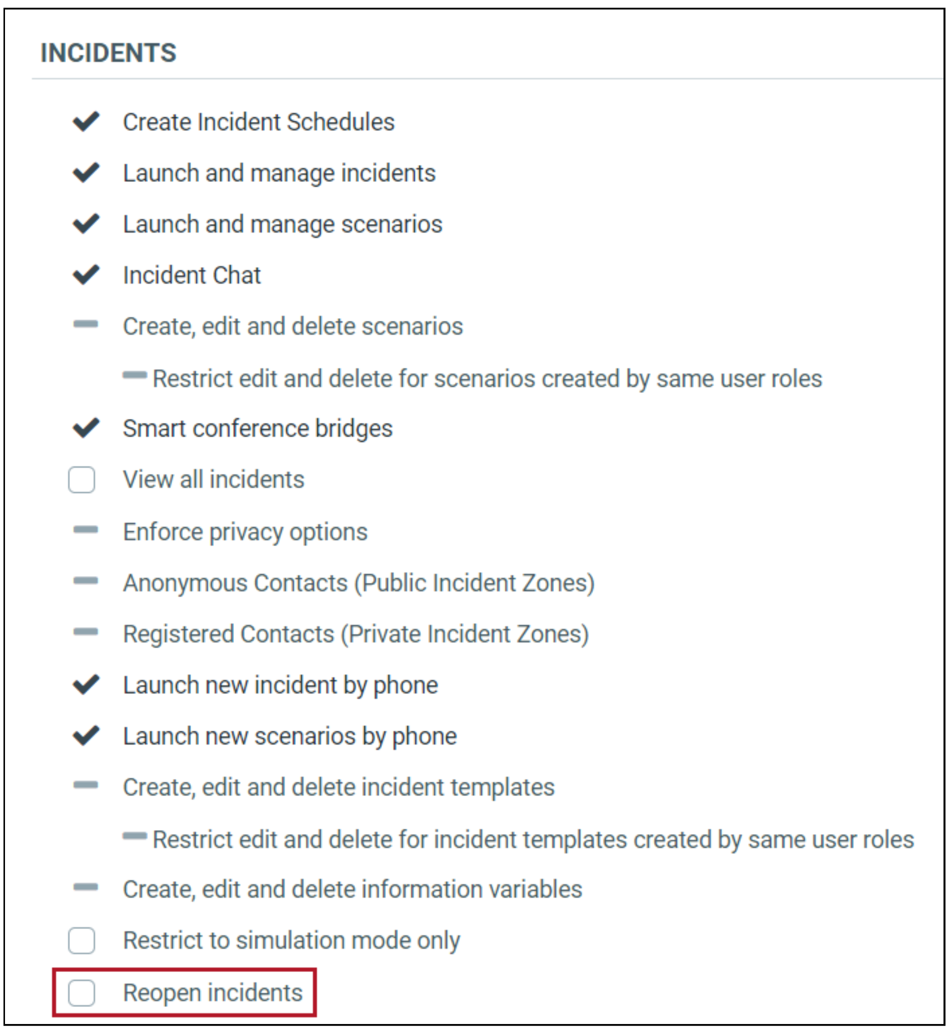
Reopening an Incident

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

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

Permissions

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

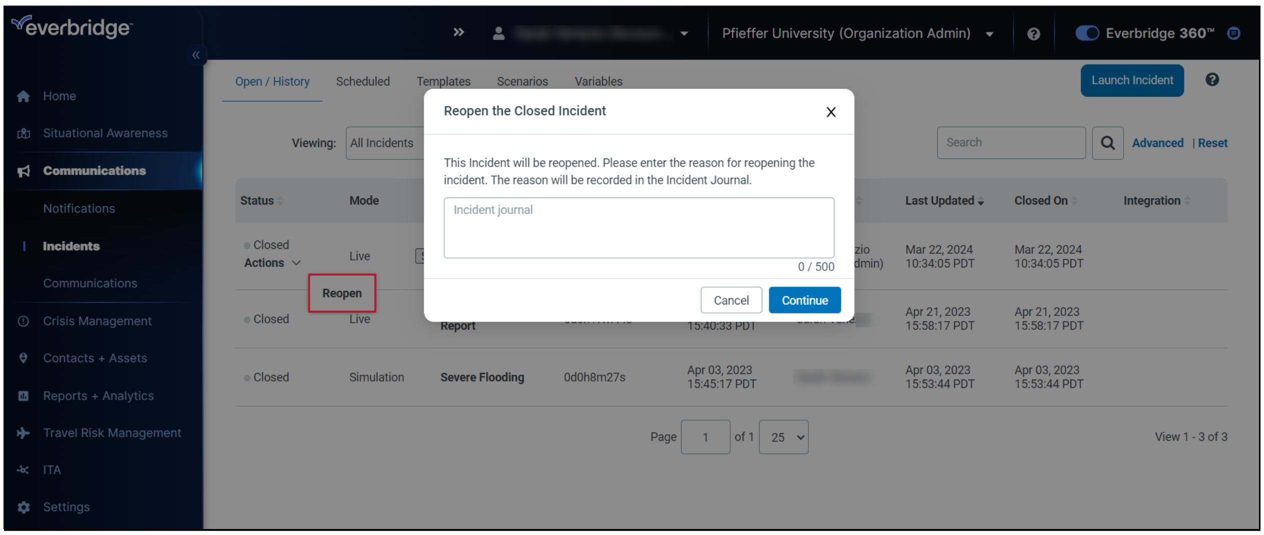


Once the **Reopen Incidents** checkbox has been selected, click **Save** at the bottom of the page.

Reopening from the Open/History Page

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

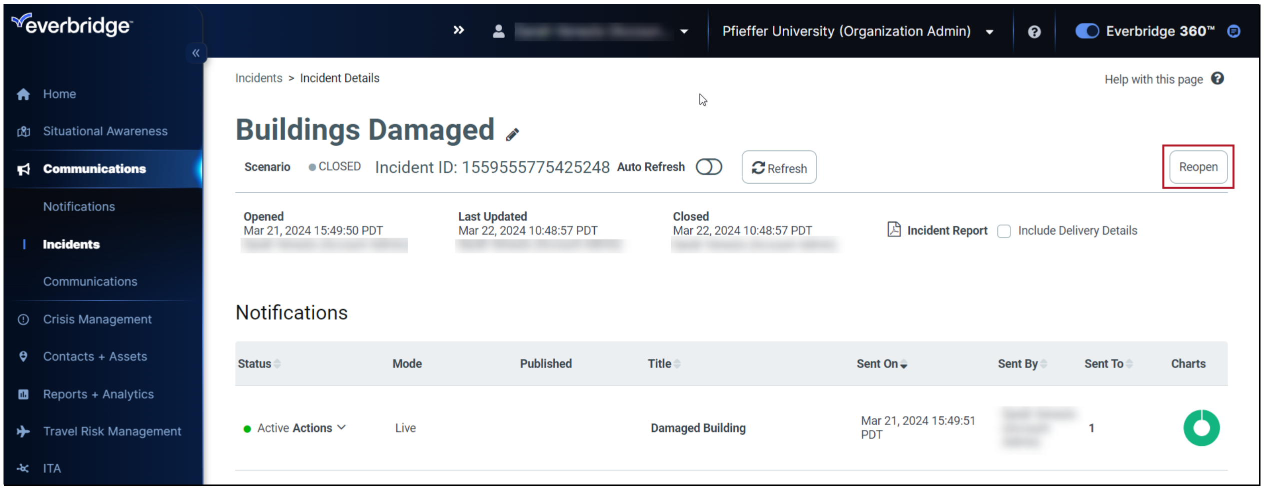
1. Click **Actions** under the **Closed** status of the Incident you want to reopen, and then **Reopen**.
2. A popup modal will appear prompting you to add a reason for reopening the Incident, which will be logged in the associated Incident Journal.
3. Click **Continue**.



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

Reopening from the Incident Details Page

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


everbridge
Home
Situational Awareness
Communications
Notifications
Incidents
Communications
Crisis Management
Contacts + Assets
Reports + Analytics
Travel Risk Management
ITA
Pfieffer University (Organization Admin)
Everbridge 360™
Incidents > Incident Details
Help with this page
Buildings Damaged
Scenario
CLOSED
Incident ID: 1559555775425248
Auto Refresh
Refresh
Reopen
Opened
Mar 21, 2024 15:49:50 PDT
Last Updated
Mar 22, 2024 10:48:57 PDT
Closed
Mar 22, 2024 10:48:57 PDT
Incident Report
Include Delivery Details
Notifications
Status
Mode
Published
Title
Sent On
Sent By
Sent To
Charts
Active Actions
Live
Damaged Building
Mar 21, 2024 15:49:51 PDT
1

Reviewing an Incident

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

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

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

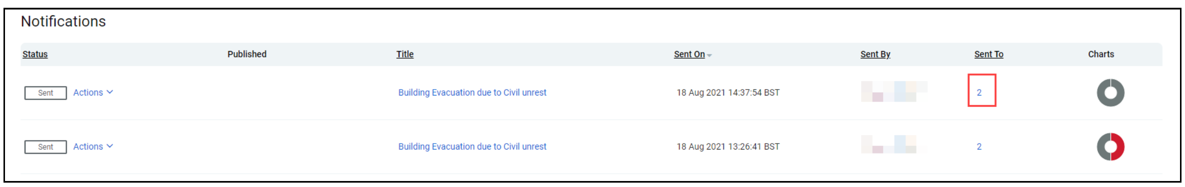
All Notifications are listed in reverse chronological order, sorted by the **Sent On** time stamp.

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

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

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

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



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

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

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

Notification Details also displays scenarios. See Scenarios.

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

Adding an Incident Journal Entry

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

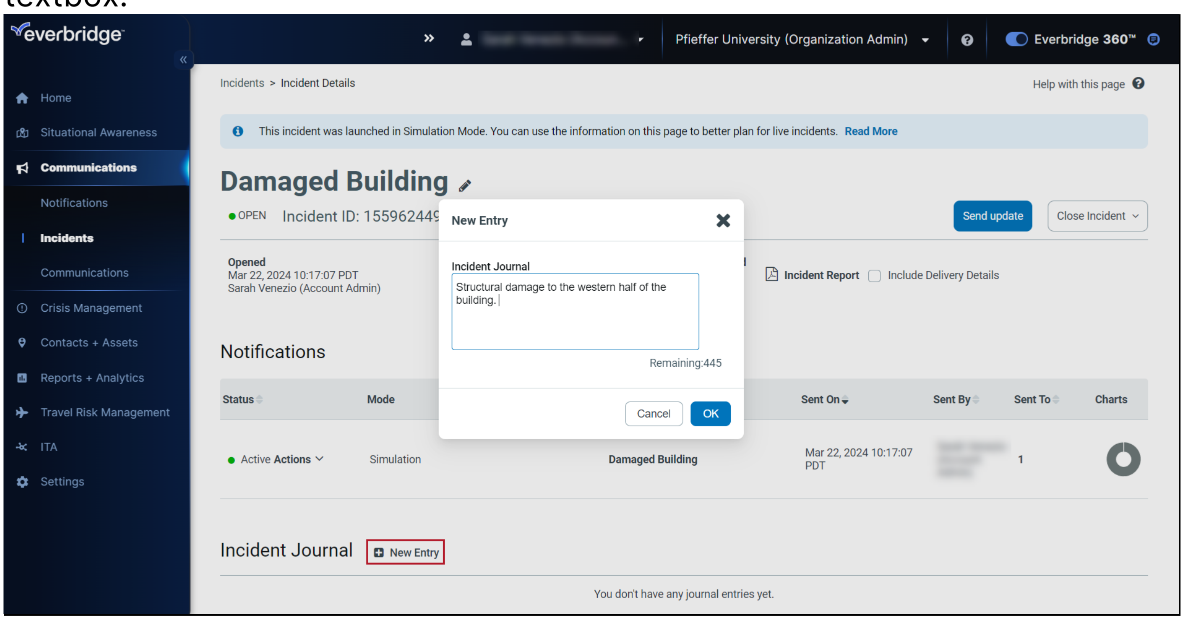
You can post any number of journal entries, even when the Incident is closed. You could post follow-up information denoting, for example, conversations, that are then documented on the Incident Report, where the entire life cycle is recorded. (All Incident information is recorded up to the instant the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

Journal entries are displayed in:

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

To add an Incident Journal entry:

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



4. Click **OK**.

Viewing an Incident Report

Incident Management consolidates all the Incident information into a PDF-formatted report that you can download at any time. The report displays all the Incident communication history in forward-chronological order. The consolidated report enables your organization to review the outcome of the Incident with other stakeholders, collect feedback from all stakeholders, improve your communication plan, and/or provide compliance information to regulators.

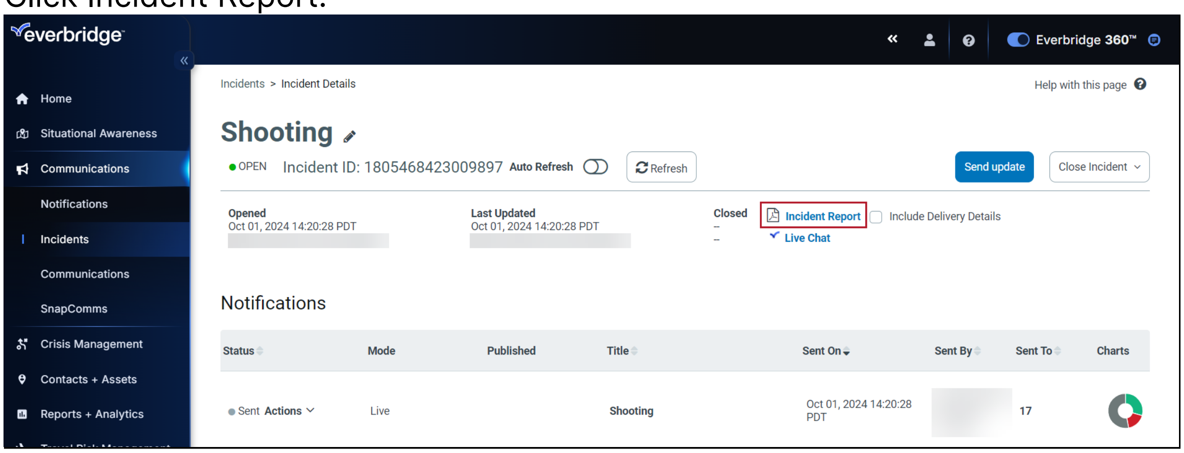
Any user with access to the **Incident Details** page has access to the **Incident Report**. (This report is not available on any other page.) You can download the report any number of times. The report reflects the latest changes to the Incident.

When you click Incident Report, depending on the browser you are using, it either drops the PDF in the footer of the browser or prompts you to save or open the report.

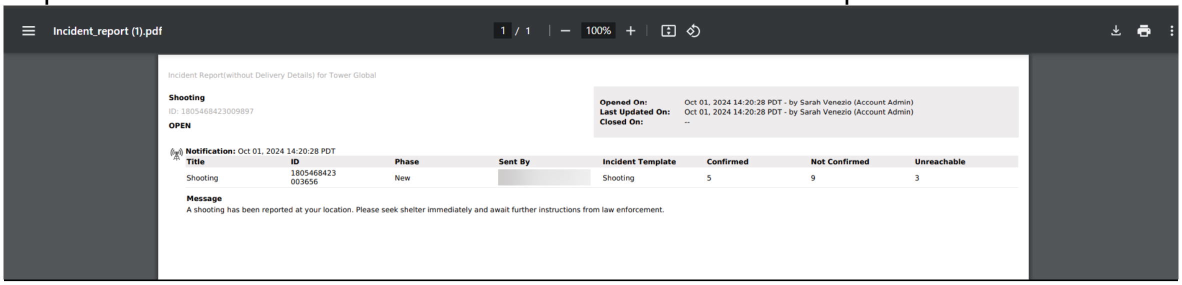
The length of the report varies, depending on the number of notifications, length of each message, number of contacts, number of attempts for each contact, and number of journal entries. The report shows all notifications and all journal entries that are added to the Incident. The initial notification (Phase: New) and its journal entries, if any, are shown first.

To view an Incident Report:

1. From the **Incident Details** page, optionally select the **Include Delivery Details** checkbox if you want the **Incident Report** to show the details.
2. Click Incident Report.



3. Open or save the report, depending on what you want to do with the Incident Report. The Incident Journal entries are shown in the report.



4. Review the following about the Incident Report.
   1. Incident Report for *Organization name*
   2. Incident name, Incident ID, and status
   3. Audit trail information
   4. The icon denotes each Notification. This area includes information about the Notification.
      - Date stamp and start time.
      - Title: Notification title.
      - ID: Unique ID number.
      - Phase: New, Update, or Closed.
      - Sent By: Full name of user.
      - Incident Template: Name of Incident template used for Notification.
      - Delivery Details: If the checkbox was selected to “include Delivery Details”, the number of Confirmed, Not Confirmed, and Unreachable are shown.
      - Message section: Displays the full message that was sent.
      - Contact path: When a message is sent to a contact, Everbridge tries the delivery methods configured in Settings, one after another, until the contact responds or until it has tried all the methods.
   5. If used, Publishing Options are included here. For example, if a Nixle Channel was used, the report would show **Type: Nixle Community Subscribers.**
   6. **Journal Entry** includes the full name of the person who posted the entry as well as the entry itself.

Sending a Follow-Up Notification

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

To send a Follow-Up Notification:

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

Reviewing Incident Details in the ManageBridge App

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

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

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

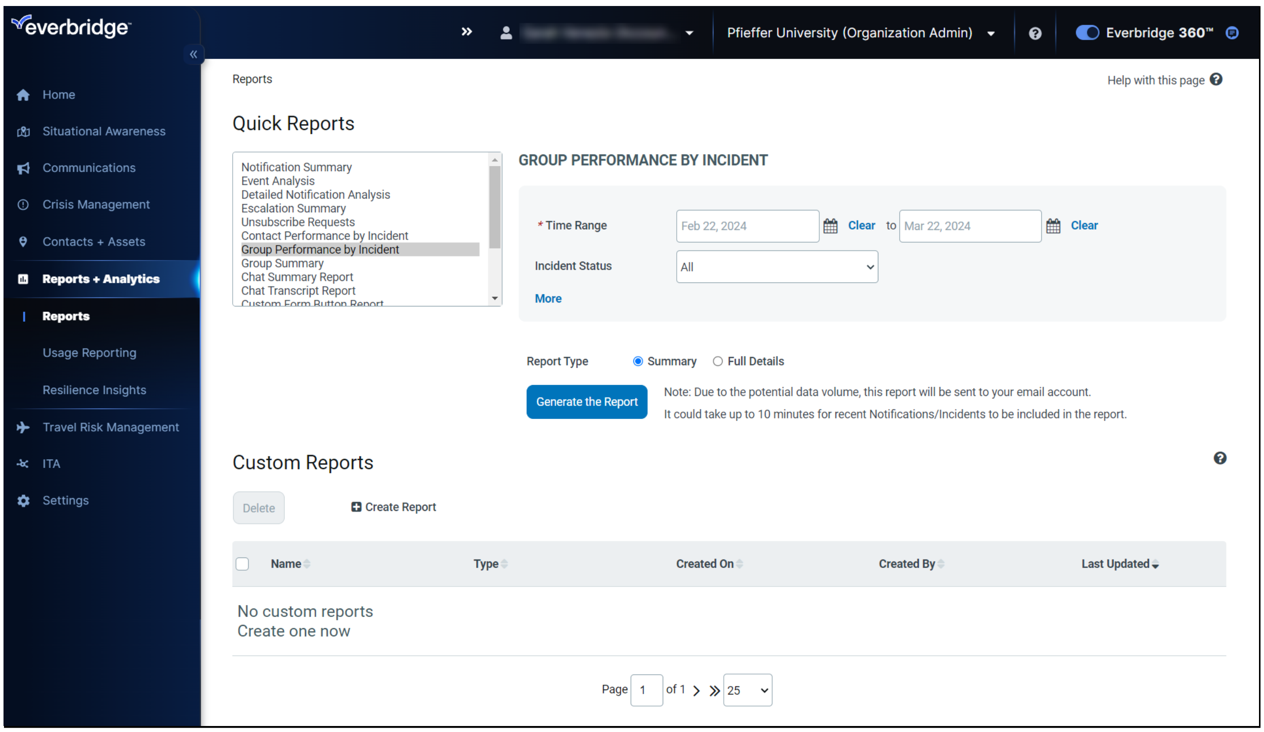
	vendors, or regulators. You can post any number of journal entries, even when the Incident is closed. You could post follow-up information denoting conversations or anything to ensure that it is documented on the Incident Report where the entire life cycle is recorded. (All Incident information is recorded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

2. Tap the desired Notification to see the Incident details.
    a. **Confirmation Status**. For each of the confirmation states (Confirmed, Not Confirmed, Confirmed Late, and Unreachable), a list of the contact names appears.
    b. **Confirmation Status by Path**. The **Confirmation Status by Path** chart shows the number of contacts that have confirmed by delivery method.
    c. Tap **Notification Summary** to see the following details:
        - Notification ID
        - Message Title
        - Message Text
        - Initiated By
        - Start Date
        - End Date
        - Throttling (Yes/No)
        - Emergency (Yes/No)
        - Notification Mode
        - Imminent Threat to Life (Yes/No)
        - Sender Email
        - Sender Caller ID
        - Delivery Methods
        - Duration
        - Contact Cycles
        - Voicemail Preferences
        - Confirm (Yes/No)
    d. Tap **Back** to return to **Incident Details**.

Quick Reports Overview

Quick Reports can be generated from the **Reports** section within Everbridge Suite and provide a wealth of information at the click of a button.

Select the Quick Report that you'd like to run from the drop-down menu to the left. If applicable, fill in any generated fields to the right once you've made your selection.



Some quick reports will offer a preview of the report, while others will have you choose between a **Summary Report** or a **Full Detail Report**.

When you're done, select **Generate the Report**.

Quick Report Options

You can learn more about each available Quick Report in the table below.

Report Name	Report Contents	Notes
Notification Summary	Shows you the county and type of Notifications sent for a given period of time (up to three months).	Notifications Only

Event Analysis	Shows the summary of information across the Notifications that are part of an **Event**.	Notifications Only
Detailed Notification Analysis	Select dates and a report or credit usage for the time selected, which will be emailed to you.	
Escalation Summary	When you select a Notification that used contact escalation, it provides all levels of that communication in a single view (similar to Event Analysis).	Notifications Only
Unsubscribe Requests	Will email you a report of all delivery method values that have unsubscribed, including the date they occurred.	Will still send you an email if empty.
Contact Performance by Incident	An emailed report for a specified period of time that provides a summary of how many Incidents each **Contact** has received, along with counts of their responses and the average time to respond. The detailed report will list each of the messages you see summarized.	
Contact Tracing Application Report	Gives a report of all Contacts and shows if they have the Everbridge App and the Contact Tracing App.	
Contact Tracing Report	Shows a daily count in one line of how many people have self-reported and in another line the	

	count of exposure events.	
Group Performance by Incident	An emailed report for a specified period of time that details how many Incidents each **Group** has received, along with counts of their responses and the average time to respond. The detailed report will list each of the messages you see summarized.	
Group Summary	Exports a list of **Groups** and associated calendars. It also includes a count of how many contacts are in each group.	
Chat Summary Report	Contains one chart showing the number of active contacts (who have chatted within the last month) versus inactive contacts. A second chart shows the number of chat messages over the last 6 months.	
Custom Form Button Report	Provides a daily count of how many times a button was pushed.	
Mobile Users Not Reporting Location	Lets you filter by timeframe (from **one hour** up to **six months**) and you are emailed a report that lists all Contacts with the Everbridge Mobile App enabled. There is a column for 'Last Reported' that indicates when that Contact stopped reporting a location.	
SOS Summary		

Location/Check-in Summary	Lets you filter by name and or timeframe (from **one hour** up to **six months**) and you are emailed a report of that person's check-ins. Includes Member Name, Record Type, Time, Latitude, and Longitude.	
Addresses Outside Geo-Fence	Displays a chart of the Contacts that have a geocoded latitude/ longitude outside of the configured Geo-fence shape file. The chart will only display if the entire Organization's contact count is below 30,000.	Will send you an email even if empty. This can be useful for anyone that wants to analyze data outside of a given area. Most often used in reviewing older SLG accounts.
Nixle Event Subscribers	Shows an extended version of the Dashboard widget, displaying the opt-in totals per day.	

Create Incident Quick Reports

Quick reports are preconfigured and provide summary information with a few mouse clicks. There are five levels of report types for Incidents:

- **Contacts** - provides information about the contacts.
- **Incident Notifications** - provides the attempt levels and paths contacted.
- **Incidents** - provides information about the Incident.
- **Incident Scenario Notifications** - provides the attempt levels and paths contacted.
- **Incident Scenario** - provides information about the scenario.

You can select the quick report you want to use.

1. Select **Reports+Analytics > Quick Reports.**
2. Select the desired Quick Report.
3. Select **View Report**.
4. Depending on the report you are viewing, you can filter on the information displayed in the report.

Contact Quick Reports

You can create and generate Quick Reports and Custom Reports for Contacts from the **Reports** tab.

The following quick reports are discussed:

- Contact Performance by Incident
- Group Performance by Incident
- Group Summary

Contact Performance by Incident

You can view Contact Notification response history for Incident Notifications. The minimum fields are:

- **Time Range**: Less than 31 days
- **Recipient**: Contact Names
- **Incident Status:** All, Open, or Closed

Choose a report style: summary or full details.

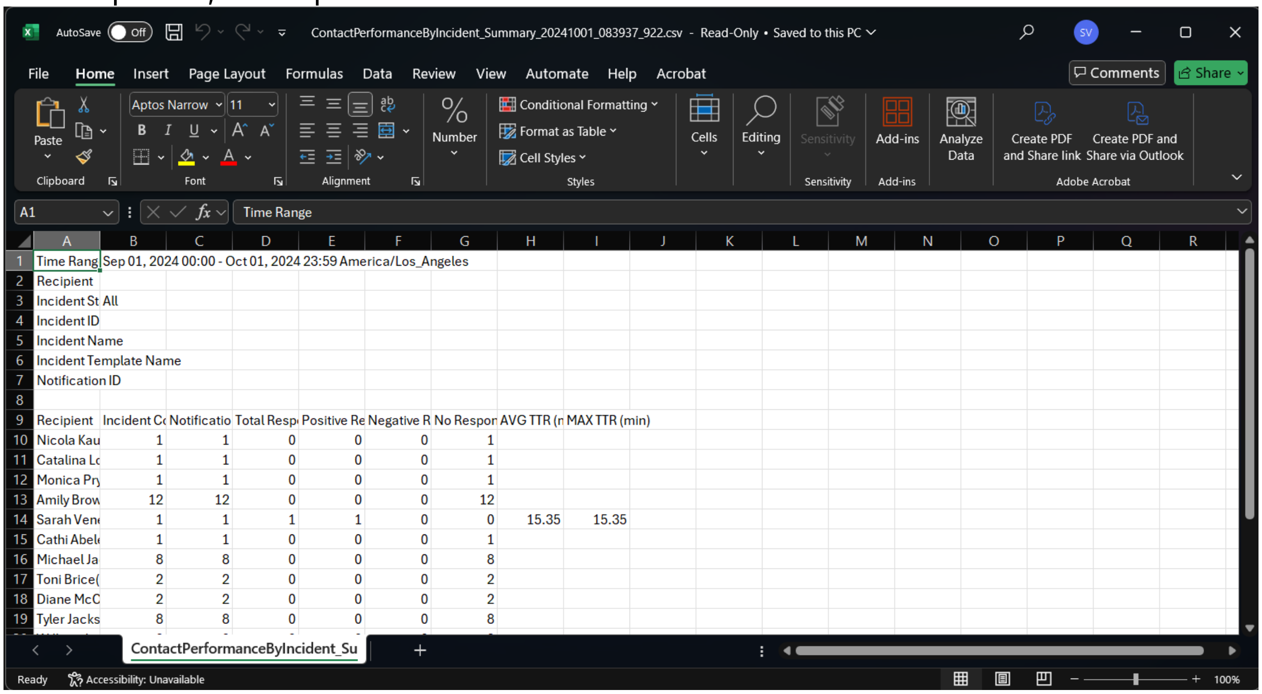
Select **More** to provide more details, as needed.

- The following fields can have up to 50 items:
  - Recipient
  - Incident ID
  - Name
  - Incident Template name
  - Notification ID
- Separate multiple input by a comma.
- The Search condition for Incident Name and Incident Template name is **Equal to** and case-insensitive.

Then select **Generate the Report**.

Contact Performance by Incident - Summary

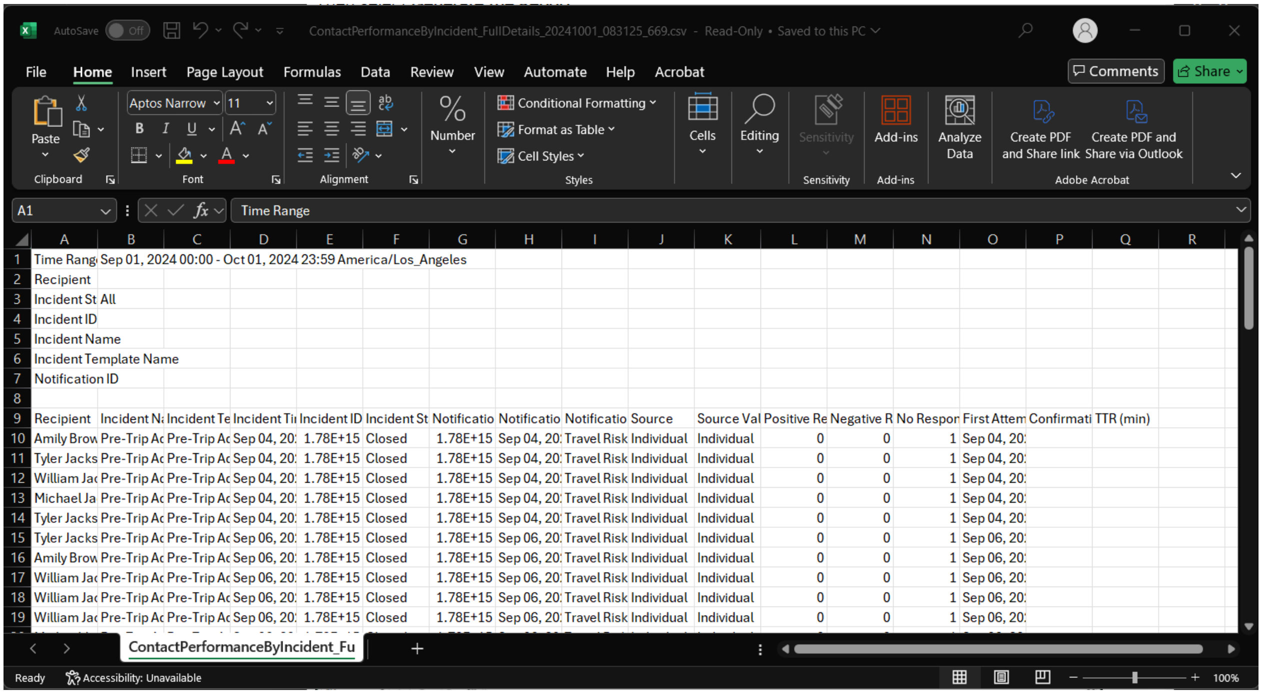
The report is sent to your email account. Click the link to download the ZIP folder. Once opened, the report will look similar to the one below:



	A	B	C	D	E	F	G	H	I
1	Time Rang	Sep 01, 2024 00:00 - Oct 01, 2024 23:59 America/Los_Angeles							
2	Recipient								
3	Incident St	All							
4	Incident ID								
5	Incident Name								
6	Incident Template Name								
7	Notification ID								
8									
9	Recipient	Incident C	Notificatio	Total Resp	Positive Re	Negative R	No Respor	AVG TTR (n	MAX TTR (min)
10	Nicola Kau	1	1	0	0	0	1		
11	Catalina Lc	1	1	0	0	0	1		
12	Monica Pr	1	1	0	0	0	1		
13	Amily Brow	12	12	0	0	0	12		
14	Sarah Ven	1	1	1	1	0	0	15.35	15.35
15	Cathi Abel	1	1	0	0	0	1		
16	Michael Ja	8	8	0	0	0	8		
17	Toni Brice(	2	2	0	0	0	2		
18	Diane McC	2	2	0	0	0	2		
19	Tyler Jacks	8	8	0	0	0	8		

Contact Performance by Incident - Full Details

The report is sent to your email account. Click the link to download the ZIP folder. Once opened, the report will look similar to the one below:



Group Performance by Incident

You can view the Notification response history for a group for Incident Notifications. The minimum fields are:

- **Time Range**: Less than 31 days
- **Incident Status**: All, Open, or Closed.

Choose a report style: summary or full details.

Select **More** to provide more details, as needed.

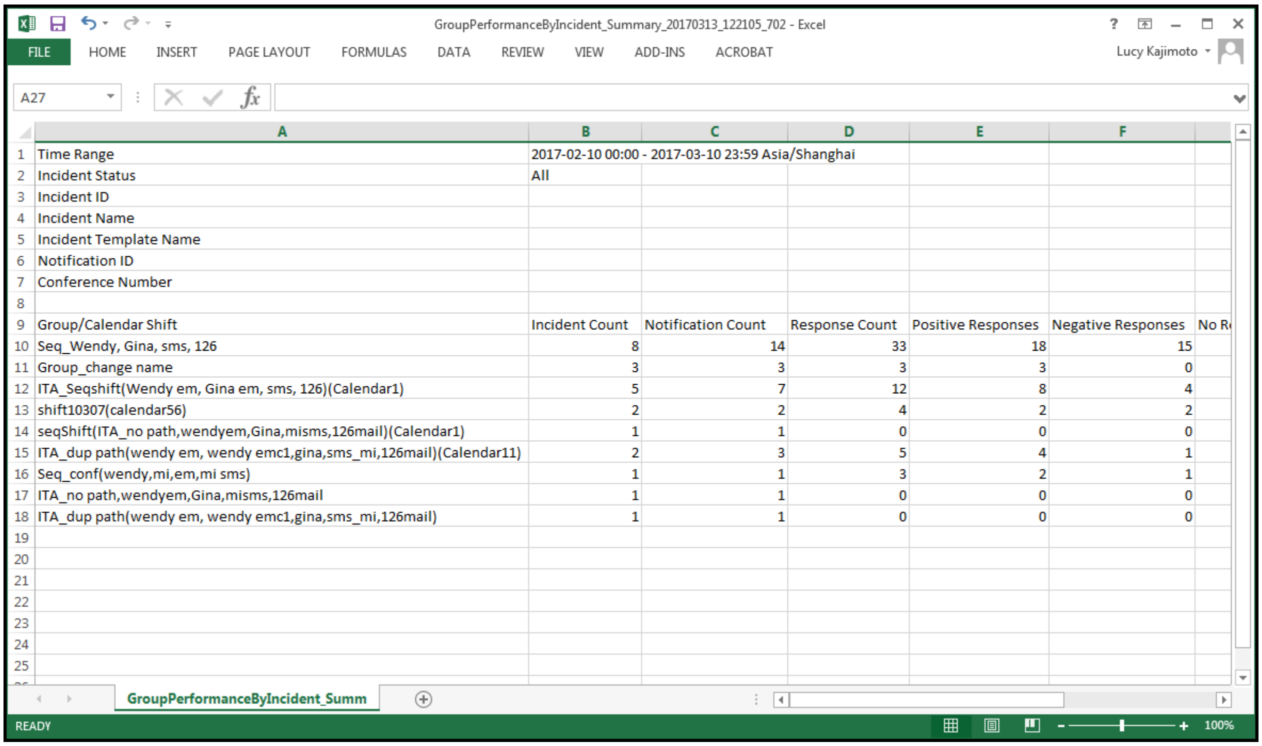
- The following fields can have up to 50 items
  - Recipient
  - Incident ID
  - Name
  - Incident Template name
  - Notification ID
  - Conference Number
- Separate multiple input by a comma.
- The Search condition for Incident Name and Incident Template name is **Equal to** and case-insensitive.

Then select **Generate the Report**.

On downloading any CSV-formatted file, Everbridge Suite screens the data before downloading to your local system. If there is any suspicious content, such as strings that start with = + - @ " (except when - and + are followed by a number), then the CSV-formatted file will be downloaded as a TXT file type during the download.

Group Performance by Incident - Summary—The report is sent to your email account.

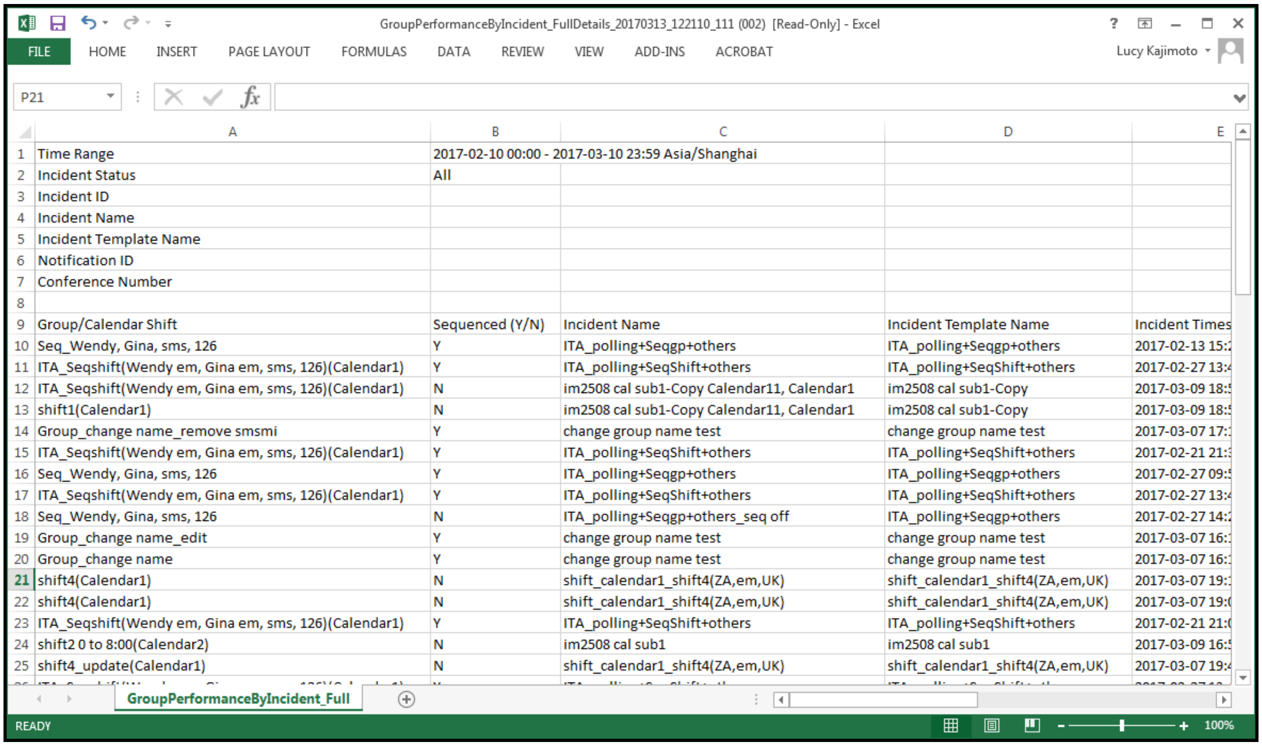
Click the link to download the zip folder. Open the zip folder and open the report. It looks similar to the following report:



	A	B	C	D	E	F
1	Time Range	2017-02-10 00:00 - 2017-03-10 23:59 Asia/Shanghai				
2	Incident Status	All				
3	Incident ID					
4	Incident Name					
5	Incident Template Name					
6	Notification ID					
7	Conference Number					
8						
9	Group/Calendar Shift	Incident Count	Notification Count	Response Count	Positive Responses	Negative Responses
10	Seq_Wendy, Gina, sms, 126	8	14	33	18	15
11	Group_change name	3	3	3	3	0
12	ITA_Seqshift(Wendy em, Gina em, sms, 126)(Calendar1)	5	7	12	8	4
13	shift10307(calendar56)	2	2	4	2	2
14	seqShift(ITA_no path,wendyem,Gina,misms,126mail)(Calendar1)	1	1	0	0	0
15	ITA_dup path(wendy em, wendy emc1,gina,sms_mi,126mail)(Calendar11)	2	3	5	4	1
16	Seq_conf(wendy,mi,em,mi sms)	1	1	3	2	1
17	ITA_no path,wendyem,Gina,misms,126mail	1	1	0	0	0
18	ITA_dup path(wendy em, wendy emc1,gina,sms_mi,126mail)	1	1	0	0	0

Group Performance by Incident - Full Details—The report is sent to your email account.

Click the link to download the zip folder. Open the zip folder and open the report. It looks similar to the following report:



	A	B	C	D	E
1	Time Range	2017-02-10 00:00 - 2017-03-10 23:59 Asia/Shanghai			
2	Incident Status	All			
3	Incident ID				
4	Incident Name				
5	Incident Template Name				
6	Notification ID				
7	Conference Number				
8					
9	Group/Calendar Shift	Sequenced (Y/N)	Incident Name	Incident Template Name	Incident Times
10	Seq_Wendy, Gina, sms, 126	Y	ITA_polling+Seqgp+others	ITA_polling+Seqgp+others	2017-02-13 15:
11	ITA_Seqshift(Wendy em, Gina em, sms, 126)(Calendar1)	Y	ITA_polling+SeqShift+others	ITA_polling+SeqShift+others	2017-02-27 13:
12	ITA_Seqshift(Wendy em, Gina em, sms, 126)(Calendar1)	N	im2508 cal sub1-Copy Calendar11, Calendar1	im2508 cal sub1-Copy	2017-03-09 18:
13	shift1(Calendar1)	N	im2508 cal sub1-Copy Calendar11, Calendar1	im2508 cal sub1-Copy	2017-03-09 18:
14	Group_change name_remove smsmi	Y	change group name test	change group name test	2017-03-07 17:
15	ITA_Seqshift(Wendy em, Gina em, sms, 126)(Calendar1)	Y	ITA_polling+SeqShift+others	ITA_polling+SeqShift+others	2017-02-21 21:
16	Seq_Wendy, Gina, sms, 126	Y	ITA_polling+Seqgp+others	ITA_polling+Seqgp+others	2017-02-27 09:
17	ITA_Seqshift(Wendy em, Gina em, sms, 126)(Calendar1)	Y	ITA_polling+SeqShift+others	ITA_polling+SeqShift+others	2017-02-27 13:
18	Seq_Wendy, Gina, sms, 126	N	ITA_polling+Seqgp+others_seq off	ITA_polling+Seqgp+others	2017-02-27 14:
19	Group_change name_edit	Y	change group name test	change group name test	2017-03-07 16:
20	Group_change name	Y	change group name test	change group name test	2017-03-07 16:
21	shift4(Calendar1)	N	shift_calendar1_shift4(ZA,em,UK)	shift_calendar1_shift4(ZA,em,UK)	2017-03-07 19:
22	shift4(Calendar1)	N	shift_calendar1_shift4(ZA,em,UK)	shift_calendar1_shift4(ZA,em,UK)	2017-03-07 19:
23	ITA_Seqshift(Wendy em, Gina em, sms, 126)(Calendar1)	Y	ITA_polling+SeqShift+others	ITA_polling+SeqShift+others	2017-02-21 21:
24	shift2 0 to 8:00(Calendar2)	N	im2508 cal sub1	im2508 cal sub1	2017-03-09 16:
25	shift4_update(Calendar1)	N	shift_calendar1_shift4(ZA,em,UK)	shift_calendar1_shift4(ZA,em,UK)	2017-03-07 19:

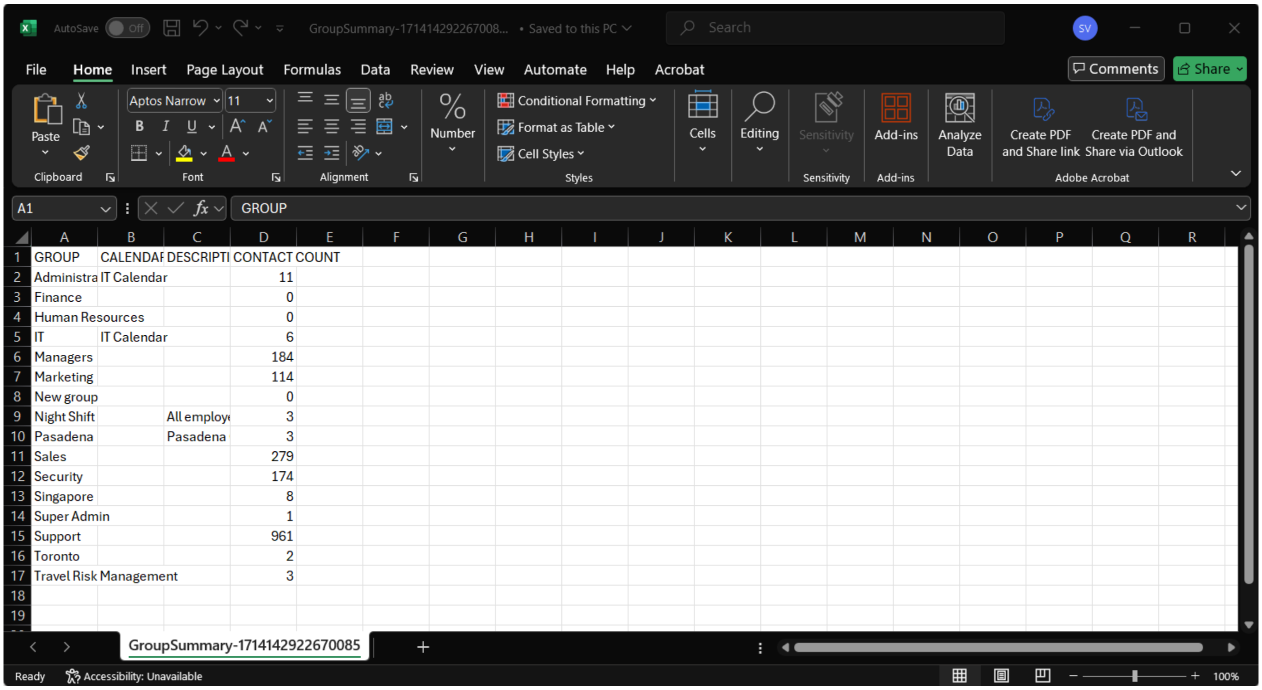
Group Summary

You can download a summary of your group. Select **Group Summary** from the **Quick Reports** pane, then click **Download CSV**.

On downloading any CSV-formatted file, Everbridge Suite screens the data before downloading to your local system. If any values start with **= + - @**, Everbridge Suite treats these values as suspicious content (except when - and + are followed by a number). The CSV-formatted file is downloaded using a TXT file extension and type.

An Alert message appears, letting you know that a link to the Group Summary report will be emailed to you.

Click the link in the email. Then, open the Excel spreadsheet to see the Group Summary. Readjust the columns as needed.



GROUP	CALENDAI	DESCRIPTI	CONTACT COUNT
Administra	IT Calendar		11
Finance			0
Human Resources			0
IT	IT Calendar		6
Managers			184
Marketing			114
New group			0
Night Shift		All employ	3
Pasadena		Pasadena	3
Sales			279
Security			174
Singapore			8
Super Admin			1
Support			961
Toronto			2
Travel Risk Management			3

Custom Reports

The **Reports** module allows you to add Custom Reports. Custom Reports are used to create a report that covers multiple Notifications or Incidents, as well as travel information for Travel Protector customers.

There are five levels of report types for incidents:

- **Contacts** - provides information about the contacts.
- **Incident Notifications** - provides the attempt levels and paths contacted.
- **Incidents** - provides information about the incident.
- **Incident Scenario Notifications** - provides the attempt levels and paths contacted.
- **Incident Scenario** - provides information about the scenario.
- **Travel Segments** – provides information about travel itineraries, segments, and travelers.

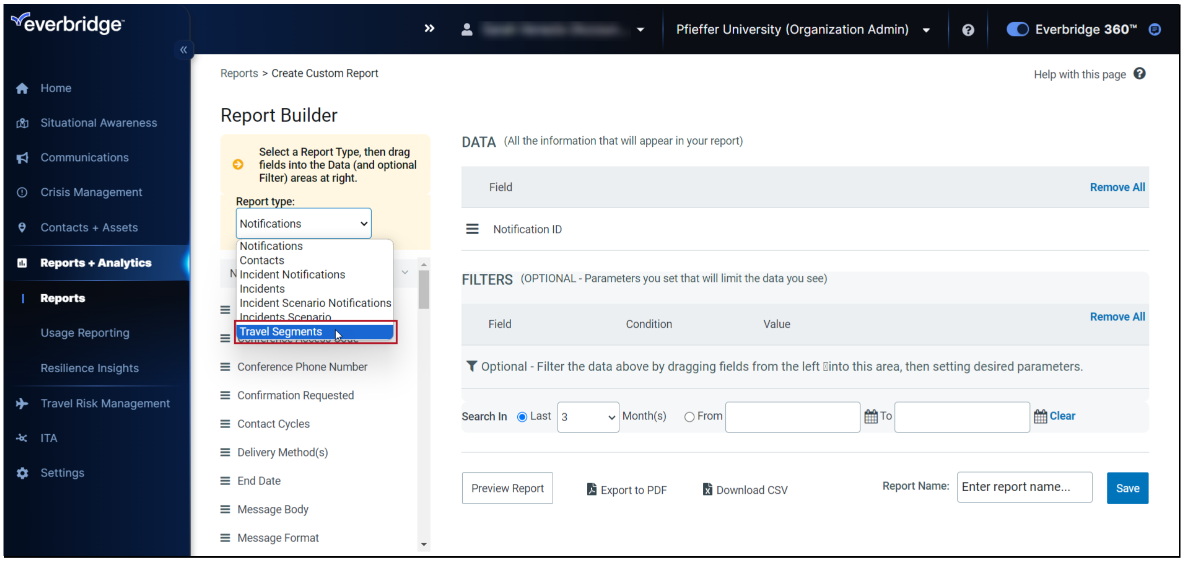
NOTE: See the *Advanced Reporting Guide* for more in-depth, granular reporting options.

Travel Custom Reports

Travel Protector customers can run a report specific to Travel Segments. To add a new Travel Custom Report:

1. From the **Reports** tab, click **Create Report**. The **Report Builder** page is displayed.

2. On the left-hand pane, select the **Travel Segments** Report Type from the menu.



3. After selecting the Report Type, data fields will appear under the report type you selected. To add a data field to your report, drag a data field to the **DATA** panel. To delete a chosen data field, click the Trash Bin next to the field name. When you add fields to the DATA panel, they are added at the bottom of the list. When the fields are displayed in the report, they are displayed from left to right.

> **NOTE:** You must add **at least one** data field related to Traveler information, such as first name, last name, or record type, along with at least one data field related to a travel segment.

4. Repeat Step 3 for all data fields you want in your custom report.
5. Set filters to narrow down the data to the values in which you are interested. Filters are optional. For example, you might only want to see travelers arriving in a specific country.
    a. To add a filter, drag a data field to the **FILTERS** panel.
    b. Select the desired condition statement from the drop-down list.
    c. Type or select the desired value in the correct format for the data type in the **Value** field.
6. Repeat Step 5 for each desired filter. To delete a filter, click the Trash Bin next to the field name.
7. Select a time frame of either **Now** (default) or enter a specific range (Past or Next xx hours or days). The maximum date range is 365 days, or a custom time range by specifying the start and end days (Maximum is one year between the start and end dates).
8. Click **Preview Report** to review your customizations. Use the Page Controls at the bottom of the page if you would like to view more records.

- To choose the number of records displayed on each preview page, select a number from the drop-down list.
- To add more data to your report, repeat step 3. To add more filters to your report, repeat step 5.

9. After the report has been configured and the preview shows you the desired data, you can export the results to a CSV file. Many software applications, including Microsoft Excel, can open a CSV file.
10. To save the report under the Reports tab, enter a name in the **Report Name** field and click **Save**. If at any time in the future you would like to run this report with updated data, click the report name under **Custom Reports**.

NOTE: Use the Excel Data Import feature to import the CSV-formatted file into an Excel workbook.

Example Travel Custom Report

The following procedure provides the steps to create a custom report for travelers who are traveling by Air to Germany in the next 30 days. Contact reports are helpful for resolving missing data, such as a delivery method.

To create a report of travelers traveling by Air to Germany in the next 30 days:

1. On the left-hand pane, select **Travel Segment** from the **Report Type** drop-down list.
2. Drag the following data fields to the **DATA** panel:
   - **First Name**
   - **Last Name**
   - **Traveler Report Type**
   - **To Date**
   - **PNR** (Optional)
3. To filter the data by country and time range:
   a. Drag the **Arrival Country** data field to the **FILTERS** panel.
   b. Under **Condition**, select **contains**.
   c. Under **Value**, select **Germany**.
   d. In the Search By section select **Specific Range**.
   e. Select **Next** and **Days** in the drop-downs and enter **30**.
4. Click **Preview Report** to review your customizations. If you want more data or filters added to your report, repeat Steps 2 and 3.
5. To save the report to your device, you can export it by clicking **Download CSV**.
6. To save the report under the **Reports** tab, enter a name next to **Report Name**. Click **Save**.

NOTE: Do not open the CSV file until the file is finished processing. Excel will shorten long External Ids if the file is opened before processing is finished.