Resident Connection - US

Everbridge Suite

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Resident Connection - United States Overview

IMPORTANT: This feature is only available to **State and Local Government Agencies**. This is a premium paid feature. If you purchased this and do not see this feature, contact your Everbridge Account Manager.

Resident Connection - United States allows State and Local Government Agency users to send Incident Communication and Mass Notification messages via Short Message Service (SMS) text message, Voice over Internet Protocol (VoIP), Wireless, or Landline telephone calls to residents and businesses in their jurisdictional area.

The Organization is configured to access the records database for your jurisdiction and automatically refreshes every month. Every resident or business record is geocoded and has at least one associated delivery method. This data allows for the largest coverage of Contacts possible for sending messages about life-threatening situations through the boundaries on the **Universe** page.

This feature is integrated with a message's **Imminent Threat To Life** (ITL) option. To use the Wireless data with Resident Connection, a user must select the **Imminent Threat To Life** checkbox.

This feature is useful, for example, for a county emergency manager to notify all residents and businesses of a town about a life-threatening flood and any steps to take for safety and possible evacuation.

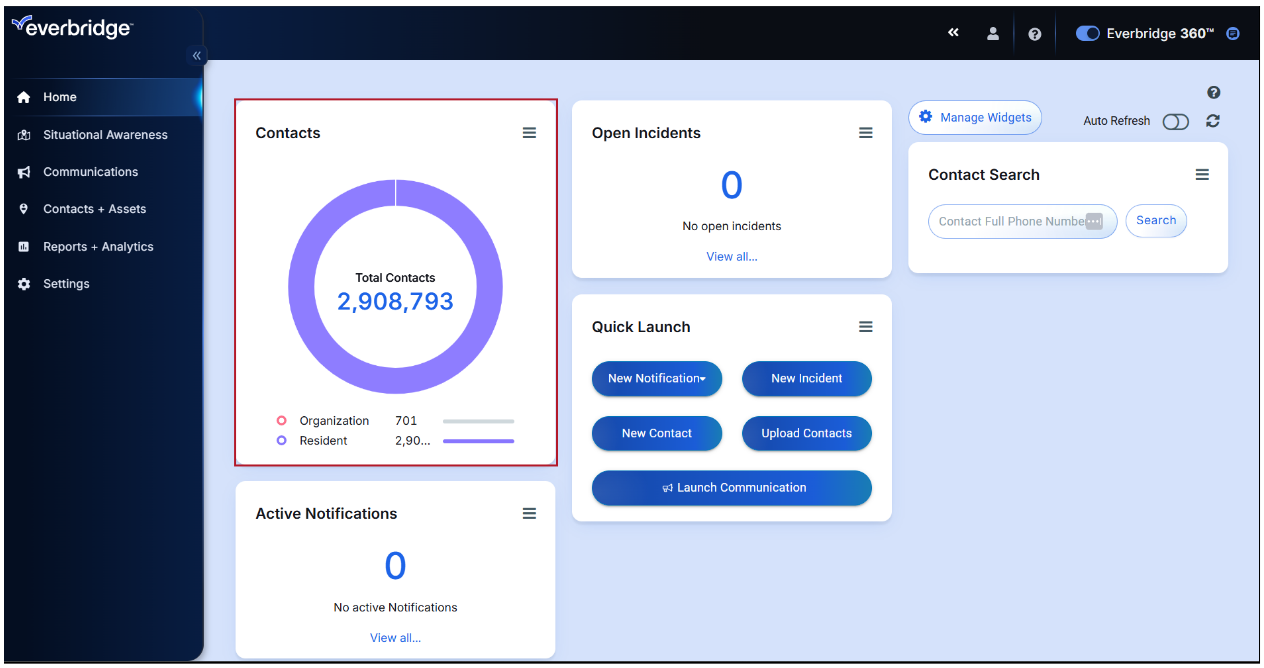
Resident Connection Dashboard

For Organizations with Resident Connection - United States enabled, the **Contacts** widget on the Dashboard contains two sections:

- **Organization Contacts**
- **Resident Connection**

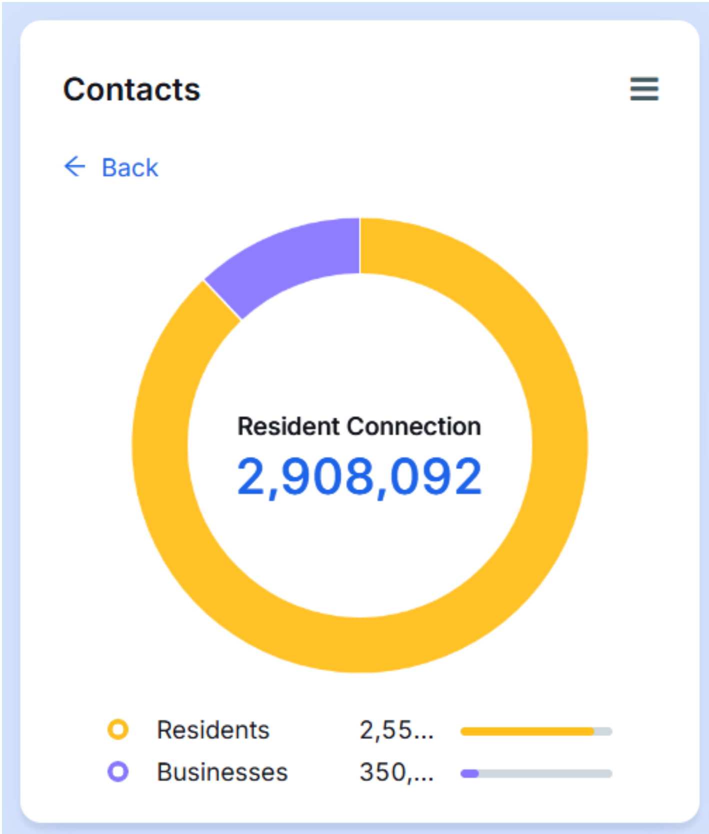
Contacts Widget

The **Contacts** widget displays the total number of contacts for an Organization, divided into the number of Organization contacts and the number of Resident Connection contacts.



To view the breakdown of your existing contacts by Record Type from the widget, click **Organization**.

To view the breakdown of Resident Connection - United States records from the widget, click **Resident**. Click the total number of residents from here to access the **Resident Connection Search** page.



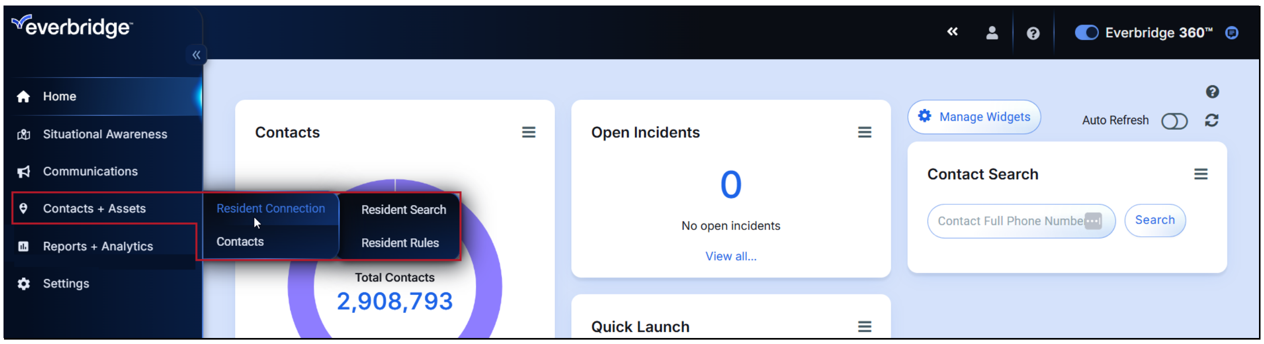
NOTE: For information about searching in Resident Connection - United States, see Resident Connection Contacts.

Resident Connection Contacts

Resident Connection - United States allows users to search the database for specific contacts, residents, and businesses. Users can search by resident first name, resident last name, phone number, and Notification delivery method.

To search for Contacts via the **Resident Connection** sub-tab in the Manager Portal:

1. Hover over **Contacts**.
2. Hover over **Resident Connection**.
3. Click either of the following:
    - Click **Resident Search** to access the **Resident Connection Search** page.
    - Click **Resident Rules** to access the **Resident Rules** page.



For information about Resident Rules, see Resident Rules.

Resident Search

To search the database by resident, navigate to the **Resident Connection Search** page and do the following:

1. Click **Resident Search**.
2. Type the information by which to search in the following fields:
    - **First Name**
    - **Last Name**
    - **Phone Number**
3. If desired, from the menu, select a Notification delivery method by which to search:
    - **All Delivery Methods**
    - **Mobile Phone**
    - **Landline**
    - **VOIP**
4. Click **Search**. A list of search results appears.

Business Search

To search the database by resident, navigate to the **Resident Connection Search** page and do the following:

1. Click **Business Search**.
2. Type the information by which to search in the following fields:
   - **Business Name**
   - **Phone Number**
3. If desired, from the menu, select a Notification delivery method by which to search:
   - **All Delivery Methods**
   - **Mobile Phone**
   - **Landline**
   - **VoIP**
4. Click **Search**. A list of search results appears.

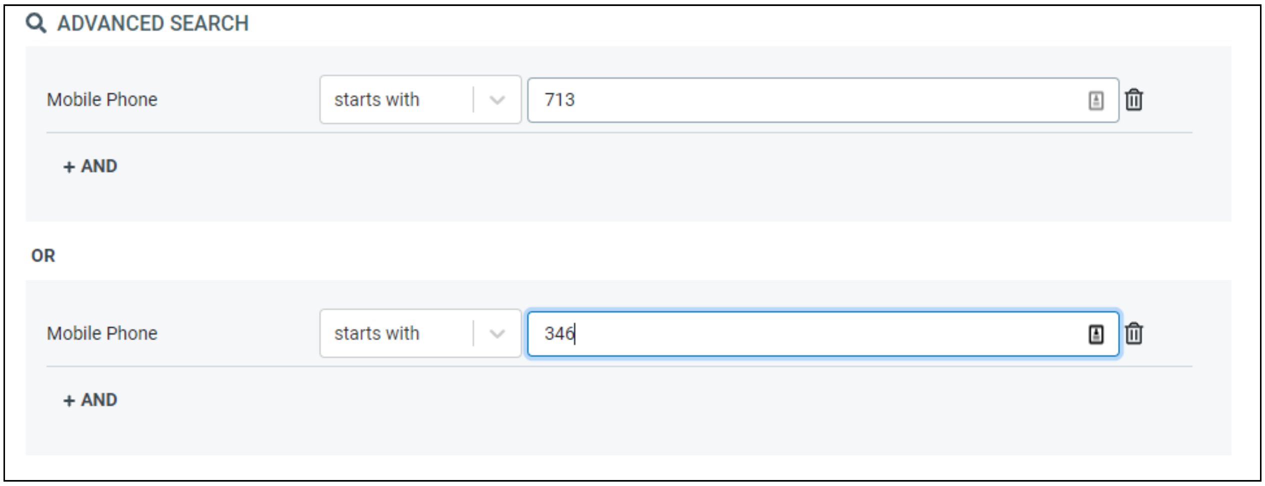
Advanced Search

If users need to use more specific search criteria for Resident or Business contacts, the **Resident Connection Search** page contains an **Advanced Search** feature. This is useful, for example, if a local government needed to send Notifications to residents in two different area codes.

To use the **Advanced Search** feature:

1. Click either **Resident Search** or **Business Search**.
2. Click the **Select Field** menu and select from any of the categories. Additional fields appear.
3. Type or select the appropriate information in the fields.
   - To add an additional category to your search, click **AND** and repeat steps 2 and 3.
   - To add alternate search criteria, repeat steps 2 and 3 under the **OR** heading.
   - To add additional alternate search criteria, click **OR** and repeat steps 2 and 3.

CAUTION: Users can only select a category one time when creating search criteria. Users who want to create search criteria for the same categories must create two different search criteria, separated by the **OR** condition. For example, a user who wants to search for Residents of a city with a mobile phone that has two different area codes would need to create two sets of search criteria. If you do not see the **OR** condition, contact your Account Manager.



To exit Advanced Search, click **Exit Advanced Search**. The **Resident Connection Management** page appears.

Resident Rules

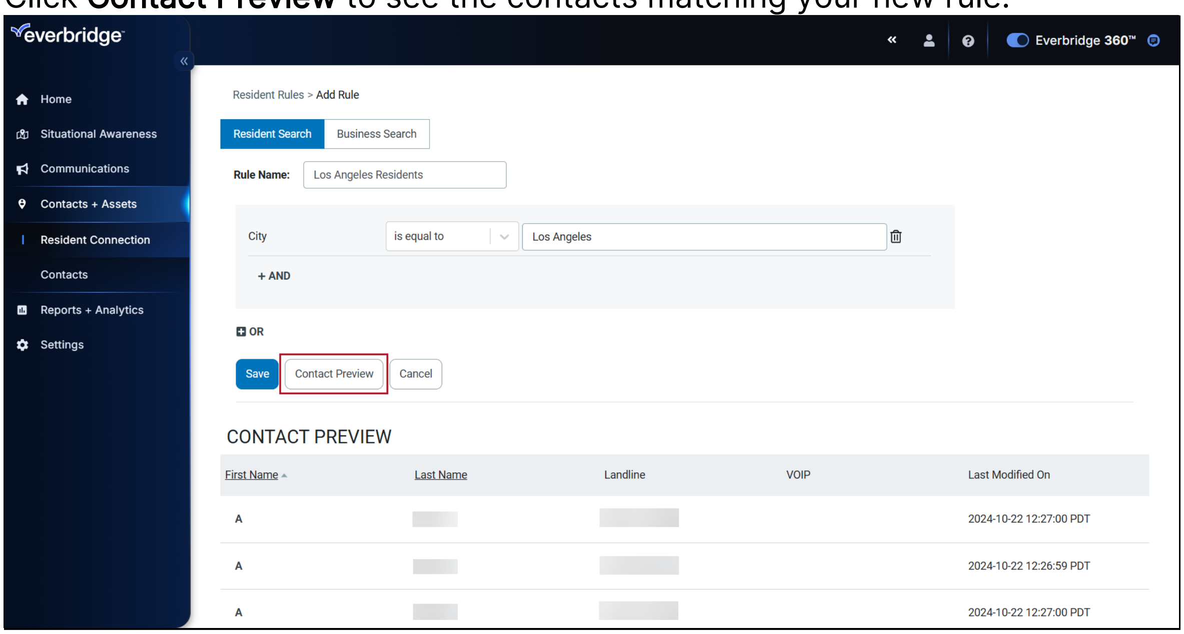
Preparing messages, lists of recipients, and other aspects of the notification in advance reduces the chance of human error in sending and responding to notifications. Rules are another way to organize your contacts for quick selection.

Rules are a dynamic way of selecting residents using multiple filters based on their contact information, such as Name, Address, or notification delivery method. Rather than assigning residents to a group, rules allow for a larger collection of residents to receive notifications based on these filters. Resident data content updates every month automatically, so the rule always remains up-to-date for sending a notification.

Adding a Rule

To add a new rule, navigate to the **Resident Rules** page and do the following:

1. Click **Add**.
2. Type a name for your new rule in the **Rule Name** field.
3. From the **Select Field** menu, select a field by which to filter. Additional fields appear.
4. Type or select the appropriate information in the fields.
5. To add more fields to the rule, select a field from the **Select Field** menu under the **And** condition and repeat Step 4.
6. To add an alternate filter to the role, repeat Steps 3 through 5 under the **Or** condition.
7. Click **Contact Preview** to see the contacts matching your new rule.

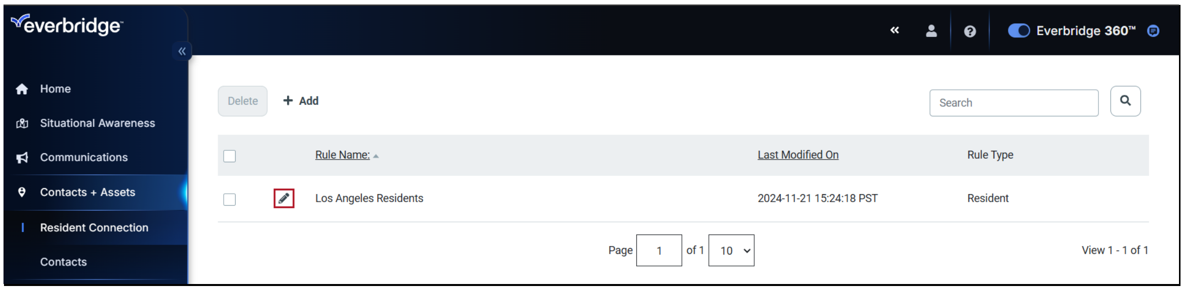


8. Click **Save**. The new rule will appear in the **Rules** list.

Editing a rule

To edit a rule:

1. If there are numerous rules, use the **Search** feature to find it.
2. Click the Pencil icon in the same row of the rule.

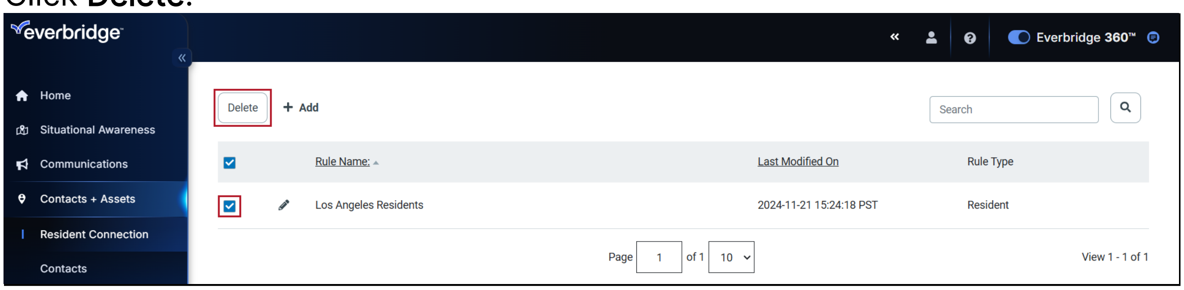


3. The **Update Rule** page appears. Make the changes.
4. Click **Save**.

Deleting a rule

To delete a rule:

1. Select the checkbox next to the rule to delete.
2. Click **Delete**.



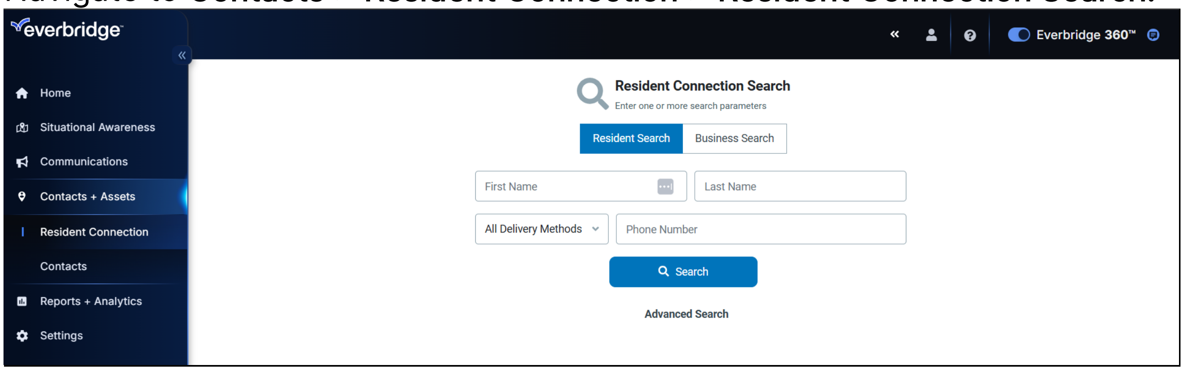
3. Confirm the deletion.

Resident Details

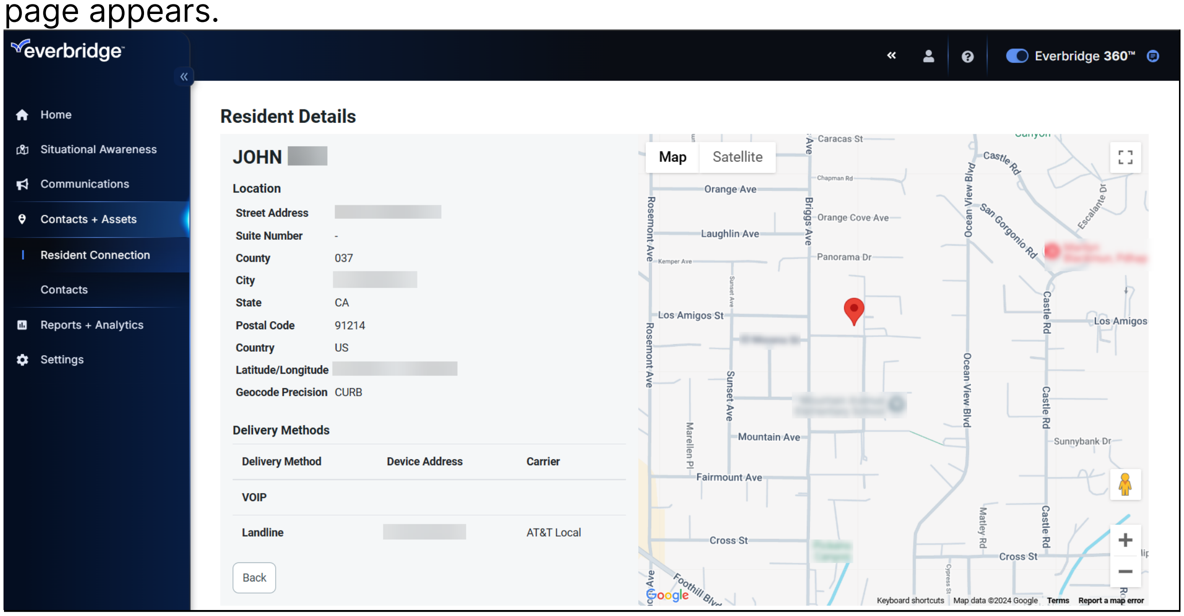
You can view Resident Connection contact details on one screen. These details include the resident or business name, the address, the geocoded location, all of their message delivery methods, and their phone carrier.

To access this information:

1. Navigate to **Contacts** > **Resident Connection** > **Resident Connection Search.**



2. Enter the search information for the resident or business and click **Search**. A new interface appears.
3. Click the link in the table that corresponds to the name of the resident or business for which to view details. The **Resident Details** or **Business Details** page appears.



The Universe in Resident Connection

Organizations with Resident Connection - United States enabled can select all of the Organization Contacts, as well as the new Resident and Businesses records, on the map in the **Universe** page. The Universe obtains the data for Residents and Businesses in a given area based on pre-loaded jurisdictional boundaries and point-of-interest (POI) data from U.S. Census Tiger Data.

Users can select whether to view only Residents, Businesses, Organization Contacts, or everyone in a designated area, ZIP code, or another boundary. Users can add the Residents and Businesses in a single area as Contacts in a message.

> **NOTE:** Resident Connection - United States icons for Residents and Businesses only appear when you are at a Zoom level of 7 or higher.

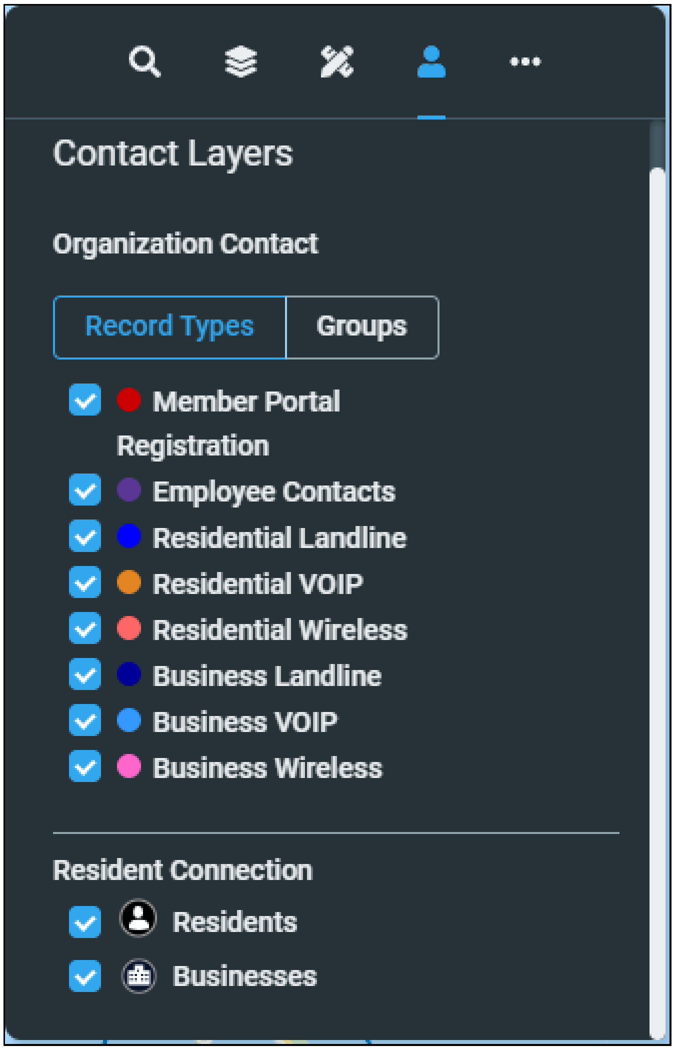
Contact Layers

On the **Universe** page, you can enable or disable Contact Layers by Record Type or Groups and Resident Connection. Users can select these contact layers when they send a Notification. This is useful, for example, if users want to create Notifications that are only relevant to local businesses.

The Universe contains the Contact Layers based on your configuration record types and groups, as well as the following additional options:

Resident Connection

- Residents
- Business



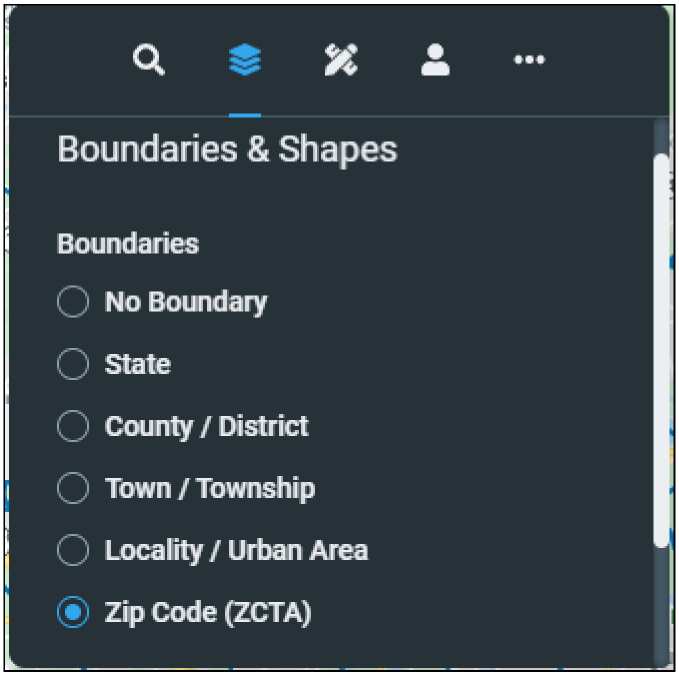
To add a contact to a message, read [Add Contacts to a Message](#).

Boundaries & Shapes

In the **Boundaries & Shapes** section, users can select contacts from saved shapes or pre-loaded jurisdictional boundaries.

Boundaries

To display a boundary, click the radio button for the boundary to establish. Users can only select <u>one</u> boundary level at a time.



Click the boundary displayed on the **Universe** map to select the geocoded contacts within it. You can select multiple boundaries on the map.

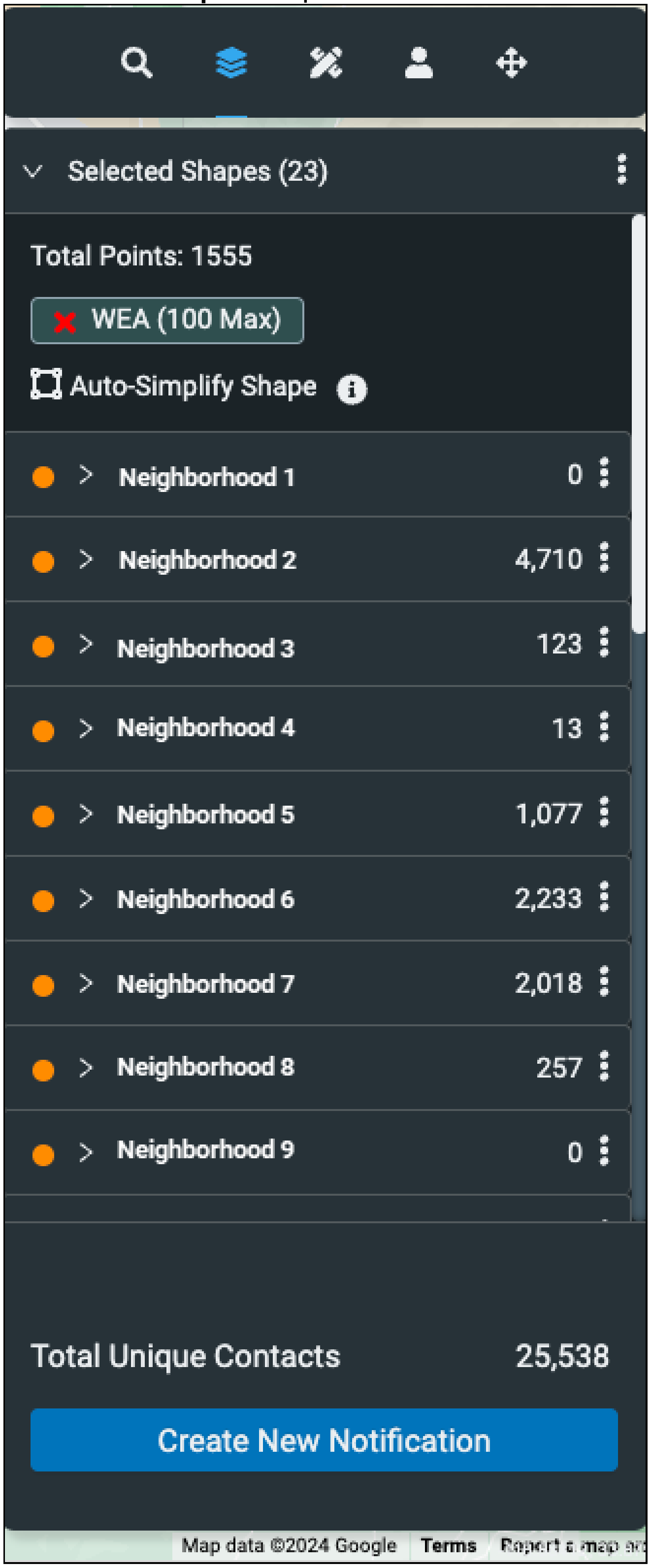
Shapes

Using a Shape from the Library

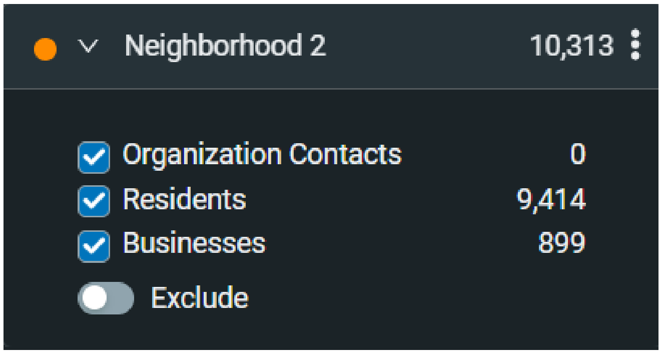
Premade shapes from the Shape Library can be used on the Resident Connection Universe Map to select contacts. To apply a shape:

1. Select a shape file from the **Shape Library** section.
2. If the shape file contains multiple shapes, select which ones to apply to the map from the list. They'll be deselected by default until clicked.

3. Repeat as needed until the desired shapes are applied. Once done, click **Selected Shapes** to preview the chosen shapes and their contact counts.



4. Click the individual shapes to choose which contact types should be included or excluded from selection.

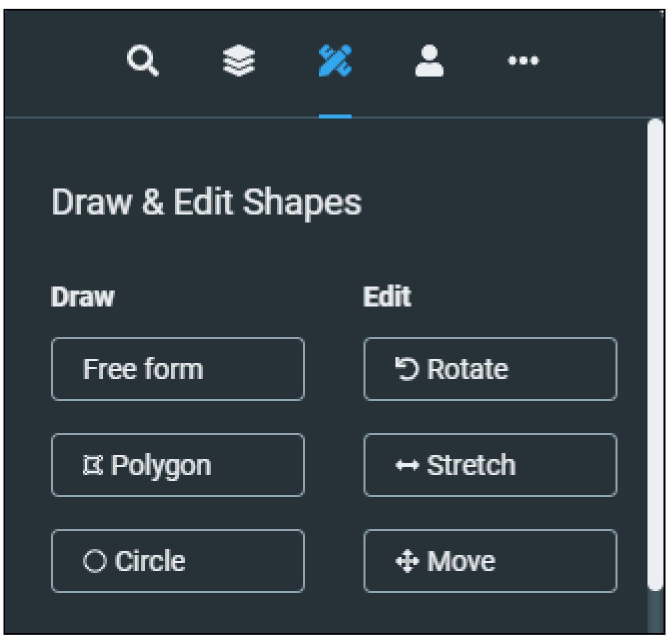


5. Once all of the shapes and contacts have been configured, click **Create New Notification** to create a Notification for the selected recipients.

Creating a Custom Shape

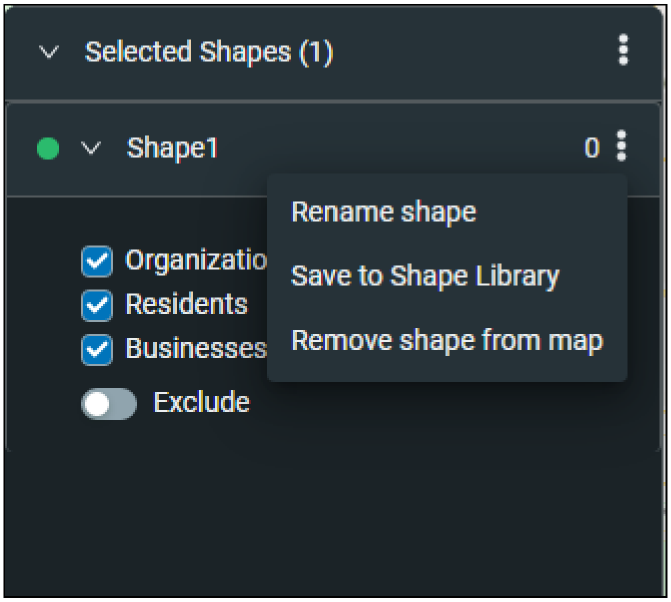
To create a custom shape:

1. Navigate to the **Draw & Edit Shapes** menu.
2. Click **Free form**, **Polygon**, or **Circle**, based on the type of shape that you want to draw.
3. Draw a shape over the map location with the Contacts to add to an alert. To edit the shape after you draw it, click **Rotate**, **Stretch**, or **Move**.



To rename, save, or remove the shape, click the three vertical dots to the right of the new shape in the panel and select the action that you want to perform.

After you save the shape, it appears under the **Shape Library** menu in the **Boundaries & Shapes** section.



CAUTION: If you apply a boundary and you zoom out beyond Level 4, the **Universe** page will display an error message.

Searching for Contacts in the Universe

Users can search for residents and businesses on the **Universe** page by entering an address, adding a marker, or drawing a circle with that point in the center. This is useful, for example, when users want to alert residents and businesses within a radius of a specific area, such as a chemical plant, of where an incident is occurring.

To search from the **Universe** page:

1. In the top-right toolbar, click the **Search** icon.

2. Select either:
   - **By Address** - Enter the address.

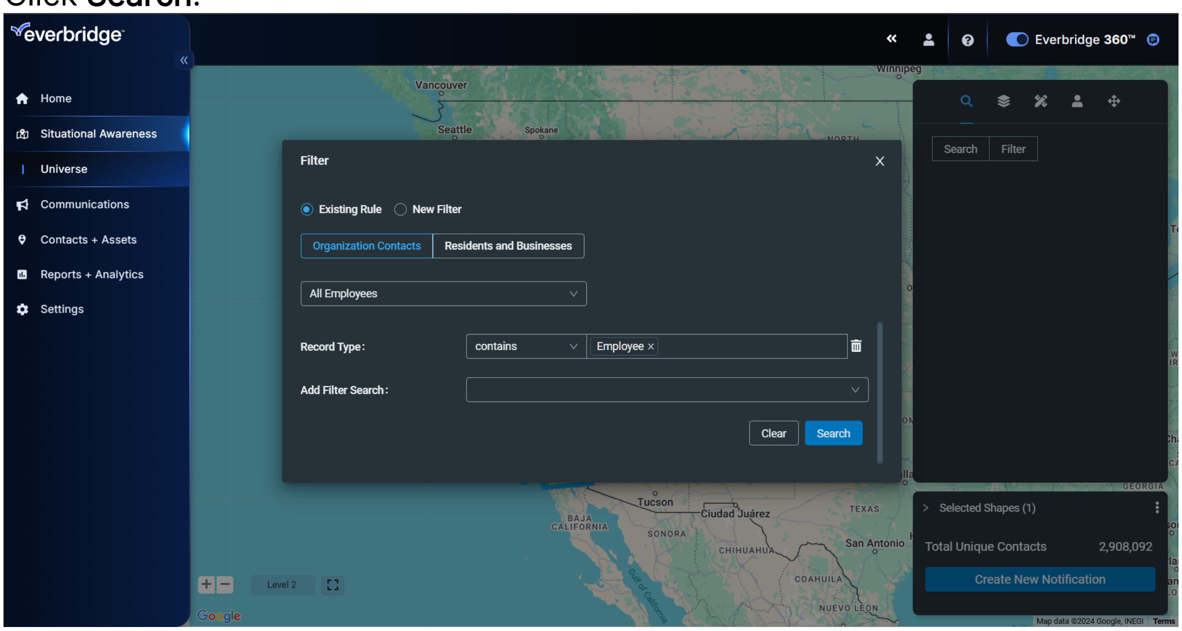
- **By Name** - Choose either **Organization**, **Resident**, or **Business**, and then enter the first and last name of the desired contact.

3. Click **Search**. A dialog with search results appears.
4. Do either of the following:
   - Select the **Set marker** radio button and click **Show on Map** to view a marker in that location on the map.
   - Select the **Set marker with the radius** radio button, enter the radius distance in the corresponding field, select the unit of distance measure from the menu, and click **Show on Map.**

Creating a Search Filter

To create a filter in the **Universe** page by which to search for contacts:

1. Create a shape or select a boundary.
2. In the top-right toolbar, click the **Search** icon.
3. Select **Filter**. The **Filter** dialog appears.
4. Select **Existing Rule** or **New Filter.**
5. Select **Organization Contact** or **Residents and Businesses**.
6. Do either of the following:
   - To search with an existing rule, choose the rule from the **Select Rule** menu.
   - To create a new rule, select the filters you want to use from the **Add Filter Search** menu and enter the necessary information.
7. Click **Search**.



The number of contacts that meet the rule's requirements will appear in the **Results** dialog.

8. Click **OK** and close the **Filter** dialog. The filter appears on the right side of the page.

- Make certain to filter Organization Contacts, Residents, and Businesses as needed.

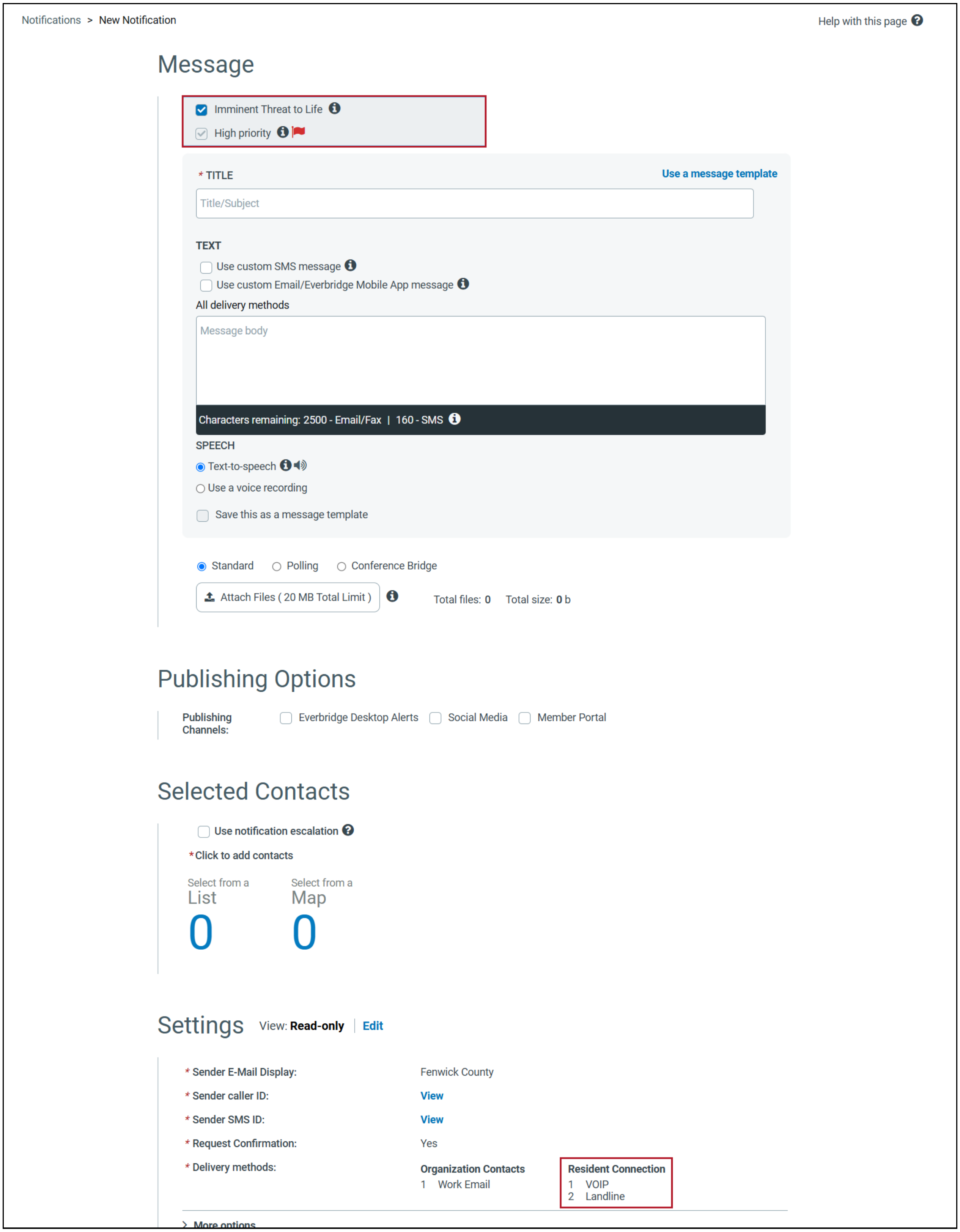
After you create your shapes and filters, click **Create New Notification** to navigate to the **Notification** page and create a message for your selected contacts.

NOTE: Shapes drawn on the **Universe** map select all geocoded contacts and Resident Connection contacts unless otherwise filtered.

Resident Connection Messages

With Resident Connection - United States enabled, the **Imminent Threat to Life** feature has additional functionality. This controls if a message is sent to only selected Landline and VoIP numbers, or if it also includes Wireless and SMS. Communications that are not marked as Imminent Threat to life can only send messages via VoIP and Landline.

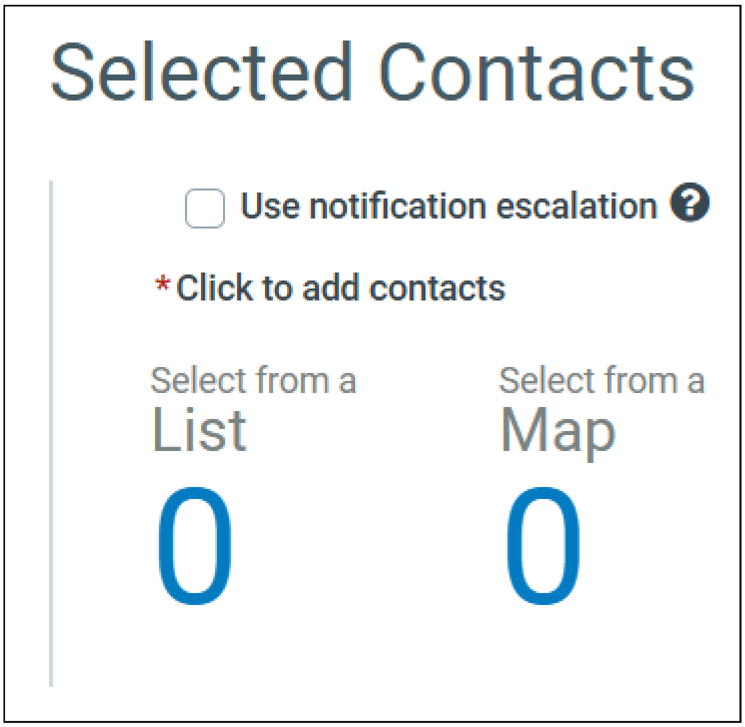
When you create a message and select the **Imminent Threat to Life** checkbox, **SMS**, **Wireless**, **VoIP**, and **Landline** appear under **Resident Connection** in the message's **Settings** section.


Notifications > New Notification
Help with this page
Message
Imminent Threat to Life
High priority
* TITLE
Use a message template
Title/Subject
TEXT
Use custom SMS message
Use custom Email/Everbridge Mobile App message
All delivery methods
Message body
Characters remaining: 2500 - Email/Fax | 160 - SMS
SPEECH
Text-to-speech
Use a voice recording
Save this as a message template
Standard
Polling
Conference Bridge
Attach Files (20 MB Total Limit)
Total files: 0
Total size: 0 b
Publishing Options
Publishing Channels:
Everbridge Desktop Alerts
Social Media
Member Portal
Selected Contacts
Use notification escalation
* Click to add contacts
Select from a List
0
Select from a Map
0
Settings
View: Read-only | Edit
* Sender E-Mail Display:
Fenwick County
* Sender caller ID:
View
* Sender SMS ID:
View
* Request Confirmation:
Yes
* Delivery methods:
Organization Contacts
1 Work Email
Resident Connection
1 VOIP
2 Landline
More options

Select Contacts for a Message

Organizations with Resident Connection see different options for selecting Contacts to add to a message:

- **Select from a List** - click the number to select Contacts from the following:
  - Individuals
  - Groups
  - Rules
  - Resident data
  - Business data
- **Select from a Map** - click the number to launch the **Universe** page and select Contacts that are geocoded by location.



Add Contacts from a List

Users can select Organization Contacts or Resident Connection contacts from a list.

Add Organization Contacts

To add Organization Contacts to a message:

1. Scroll down to the **Select Contacts** section and click **Select from a List.** The **Contacts** dialog appears.

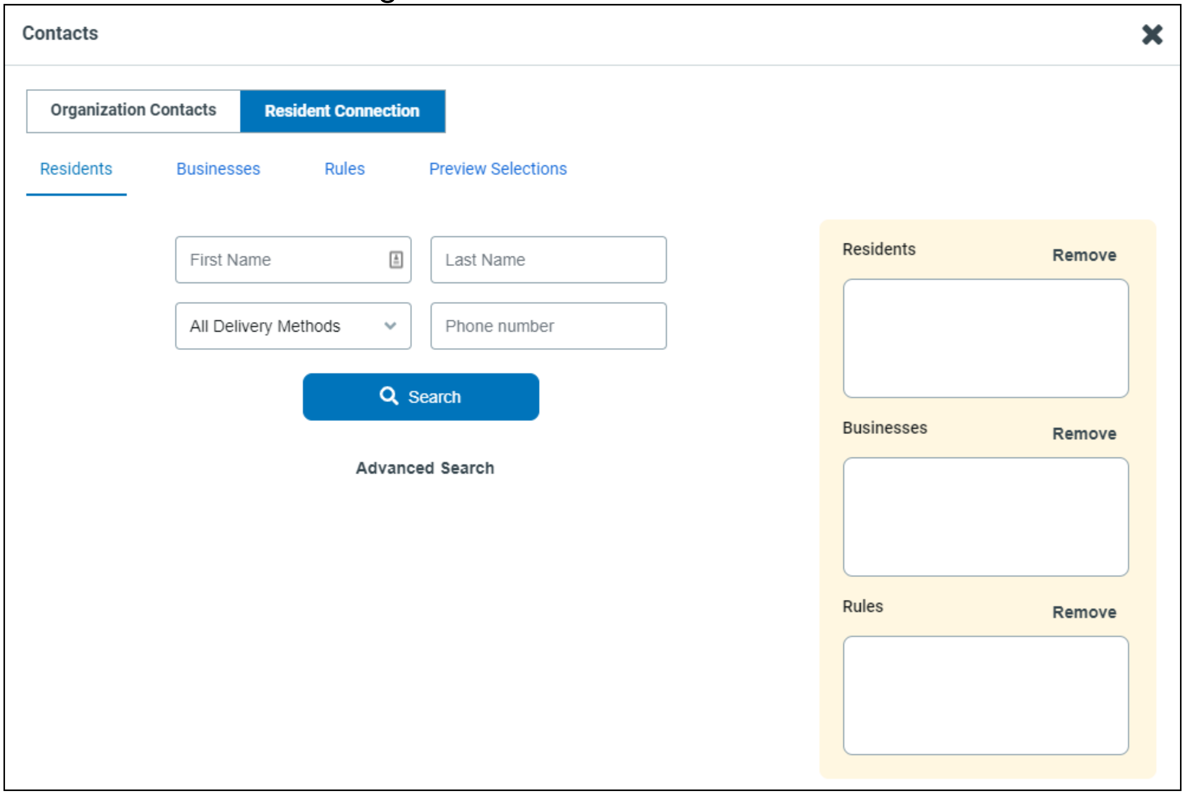
2. Click the **Individuals**, **Groups**, or **Rules** sub-tab to add Contacts individually, by group, or by rule.
    - To select individuals, click **Individuals** and select the check box of the desired contact names. Users can search for individuals by first and last names. The individuals appear in the **Individuals** box in the right-hand panel.
    - To select groups, click **Groups** and select the desired group names. Users can also search by Group Name. The groups appear in the **Groups** box in the right-hand panel.
    - To select rules, click **Rules** and select the check boxes of the desired rules. Users also can search for desired rules. The rules appear in the **Rules** box in the right-hand panel.
3. Preview the contacts to be added to the message. To do this, click **Preview**. The contacts who will receive the message appear in the **Unique Contacts** menu**.**
4. Click **OK**. The number of Contacts to receive the message appears under the **Select from a List** heading**.**

Add Resident Connection Contacts

To add residents and businesses from Resident Connection:

1. Scroll down to the **Select Contacts** section and click **Select from a List.** The **Contacts** dialogue box appears.
2. Click Resident Connection.
3. Click the **Residents**, **Businesses**, or **Rules** sub-tab to add individual residents or businesses or residents and businesses by rule to the Notification.
    - To select individual residents, click **Residents** and enter the appropriate information in the fields. Select the checkboxes of the residents to add.
    - To select individual businesses, click **Businesses** and enter the appropriate information in the fields. Select the checkboxes of the businesses to add.
    - To select rules, click **Rules**. Users also can search for desired rules. The rules appear in the **Rules** box in the right-hand panel.
4. Preview the contacts to be added to the message. To do this, click **Preview**. The contacts who will receive the message appear in the **Unique Contacts** menu**.**

5. Click **OK**. The number of Contacts to receive the message appears under the **Select from a List** heading.



Add Contacts from a Map

Users can add Organization Contacts or Resident Connection contacts to a message from the Map. To do this:

1. Scroll down to the **Select Contacts** section and click **Select from a Map.** The **Contacts** Map appears.
2. Select residents or businesses to add to the message. To do this, use any of the following methods:
   - Click the magnifying glass to search for residents and businesses by name or address. Enter the information by which to search in the appropriate fields.
   - Click the stacked paper logo to access the **Boundaries & Shapes** menu. Users can select residents or businesses based on the following categories:
     - No Boundary
     - State
     - County / District
     - Town / Township
     - Locality / Urban Area
     - ZIP Code (ZCTA)

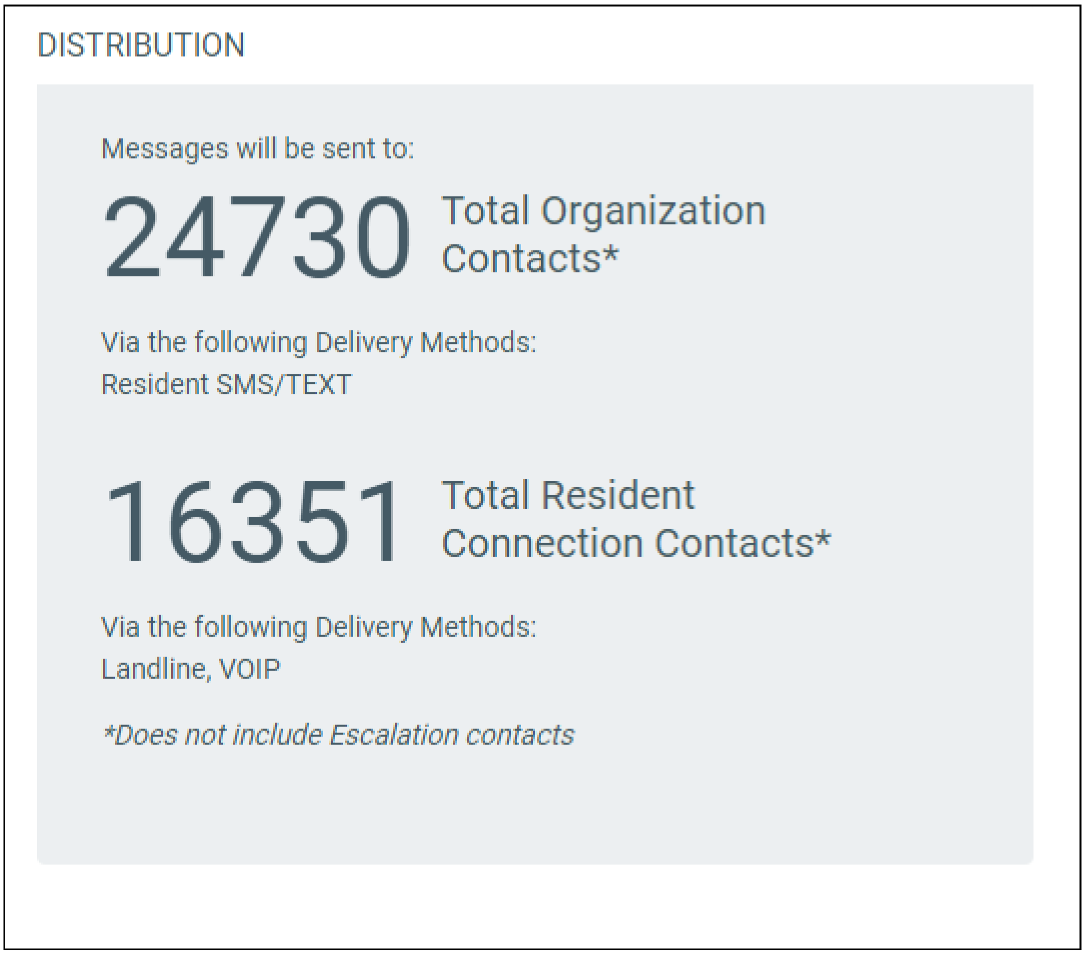
- To select a boundary that contains the desired residents and businesses, click the radio button for the boundary category to use. The boundaries appear on the map. Click one or more boundaries to select the Residents and Businesses within the boundary.
- Select a pre-designed shape of an area containing residents and users. To do this, select the desired check boxes under the **Shape Library** heading. After the shapes are selected, the map will display the shape and select the residents and businesses in that shape.
- Click the drawing tools icon to access **Draw & Edit Shapes** menu. Select a shape to use. Then, draw a shape over the map location with the Contacts to add to an alert.
- After the shape is saved, the shape appears under the **Shape Library** menu in the **Boundaries & Shapes** section.
- Click the Person icon to access the **Contact Layers** menu. The **Map** contains Contact Layers for your configured Record Types, the Resident Connection data, and any configured Groups.

3. To choose message recipients, select the checkbox for that category in the **Contact Layers** menu.
4. After selecting the message recipients in the map, click **OK.** The number of recipients appears under the **Select from a Map** heading**.**

Preview Contacts for a Message

When you launch an Incident, the page may prompt you to review the message before you send it. If this option does not appear, an Administrator can enable it for you.

When you preview the message, the list of contacts who will receive it will display under the **DISTRIBUTION** heading. This information will include the number of Organization Contacts and Resident Connection Contacts who will receive the message, as well as the method by which they will receive it.



After you review the distribution list, click **Send** in the lower right corner of the page.

Resident Connection Settings

Resident Connection - United States users have four additional message delivery methods available in **Settings** > **Organization** > **Notifications** > **Delivery Methods**:

- **Mobile(SMS/Text)**
- **Mobile(Voice)**
- **VoIP(Voice)**
- **Landline(Voice)**

You can change the sequence order. However, we recommend that you always send messages in the following order:

1. SMS messages
2. Wireless
3. VOIP
4. Landline

This order helps limit local network congestion when sending a message to a large jurisdiction. You can also edit the delivery methods' Prompts. However, you cannot remove any of these delivery methods.