

Advanced Reporting Guide

Everbridge Suite November 2024



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Everbridge software is covered by US Patent Nos. 6,937,147; 7,148,795; 7,567,262; 7,623,027; 7,664,233; 7,895,263; 8,068,020; 8,149,995; 8,175,224; 8,280,012; 8,417,553; 8,660,240; 8,880,583; 9,391,855. Other patents pending.

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Advanced Reporting

Introduction

Everbridge **Advanced Reporting** is a next-generation reporting solution that enables users to evaluate their Organization's many important use cases. Built on <u>Google Looker</u>, Advanced Reporting is a unified interface that aims to provide consistent reporting capabilities across all of the Everbridge products leveraged by an Organization.

For full instructions on the more complex aspects of Looker, see their <u>documentation</u>.

Availability

Advanced Reporting is available to customers who have purchased the following Everbridge Suite/CEM-based solutions:

- Incident Management
- CEM Business Operations
- CEM People Resilience

Supported Roles

While support for additional user roles will be added in later iterations, the launch version of Advanced Reporting is available for the following roles:

- Organization Administrator
- Incident Administrator

For additional flexibility, Advanced Reporting also supports Custom Role configuration for the following permissions:

- View/Run Reports
- Create, Edit, and Delete Reports
- Export Data
- Schedule Report Delivery

For more on Custom Roles, see the <u>Custom Roles Guide</u> and the Custom Roles Permissions Grid on the **Roles** page in the Manager Portal.

Data Refresh

The Incident, Notification, and contact data is refreshed every four hours. The default dashboards come with a timestamp displaying when it was last refreshed.

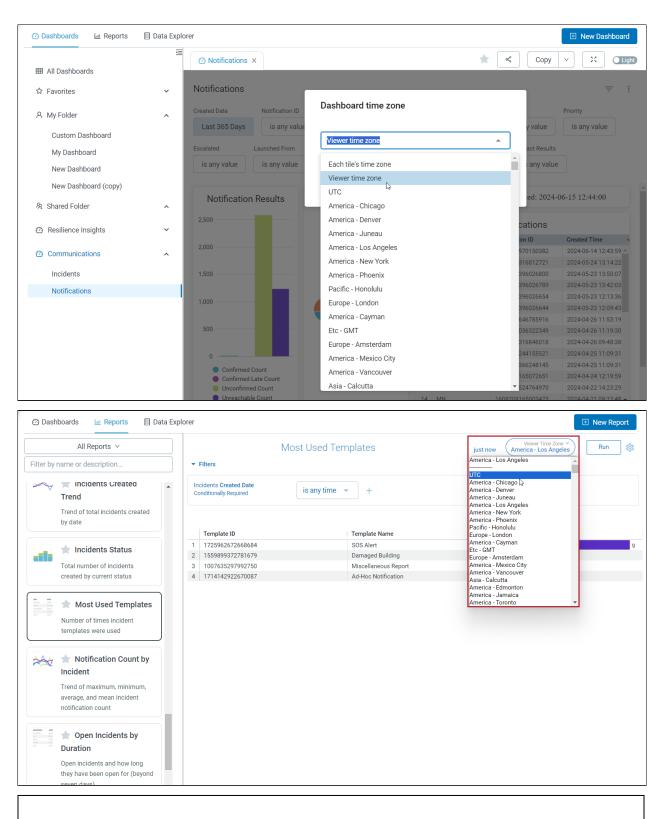


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Time Zones

All data found within the dashboards, reports, or data explorer are displayed in the viewer's time zone by default. If needed, this can be changed by clicking on **Dashboard Time Zone** from a dashboard, or **Viewer Time Zone** from a report or data explorer.





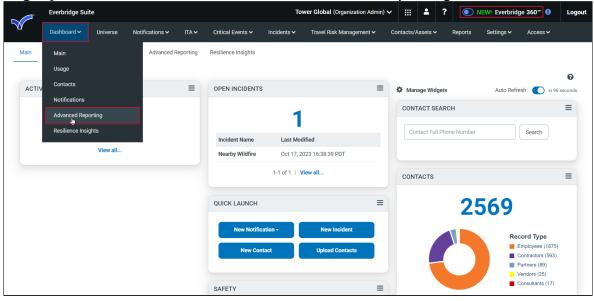
NOTE: The data within a scheduled report will still be displayed in UTC regardless of the selected time zone.



Accessibility

Advanced Reporting can be accessed in two ways, depending on the applied Manager Portal user interface:

• Legacy UI - Found under Dashboard > Advanced Reporting.



• Everbridge 360 UI - Found under Reports + Analytics > Advanced Reporting.

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Dashboards

Dashboards, which can be found under the **Dashboards** tab of Advanced Reporting, refer to the preconfigured and user-defined interfaces that present a comprehensive overview of an Organization's actionable data. Each dashboard consists of **Widgets**, which are standalone visualizations built off of attributes in the data. Reporting data goes back in an 18-month rolling time window. Resilience Insights customers can also see up to three years of historical data for Incidents and Notifications.

Custom dashboards can be created from different data points, and preconfigured Incidents and Notifications dashboards are provided to all applicable users. See <u>Create New Dashboard</u> for more information.

NOTE: Resilience Insights customers can also utilize Risk Event and Alert-specific dashboards.

The following table contains the descriptions of these preconfigured dashboards:

Dashboard	Description
Incidents	Displays all the Incidents launched by an Organization over a specific period. The Incident data can be filtered across ID, Template, Variables, and Contacts, among other filters.
Notifications	Displays all the Notifications generated by an Organization over a specific period. The Notification data can be filtered across ID, Status, Type, Source, Priority, Escalation, and Contacts, among other filters.

Filters

Each dashboard contains a row of filters. Each dashboard filter selected will affect the data displayed in each report widget and table. Use the filters to narrow the data to the criteria that meet your use case.

ADVANCED REPORTING GUIDE



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Download Dashboard Data

Each dashboard contains a **Download** menu item, allowing users to download the dashboard as a static PDF to share with the stakeholders in their Organization. Dashboard downloads are currently limited to 5,000 rows.



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Download Widget Data

Each widget within the dashboard also contains a **Download** menu item. Widget downloads are currently limited to 5,000 rows.

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Data can be downloaded in the following formats:

- TXT (tab-separated values)
- Excel spreadsheet (Excel 2007 or later)

Veverbridge

- CSV
- JSON
- HTML
- Markdown
- PNG (image of visualization)

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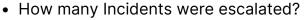


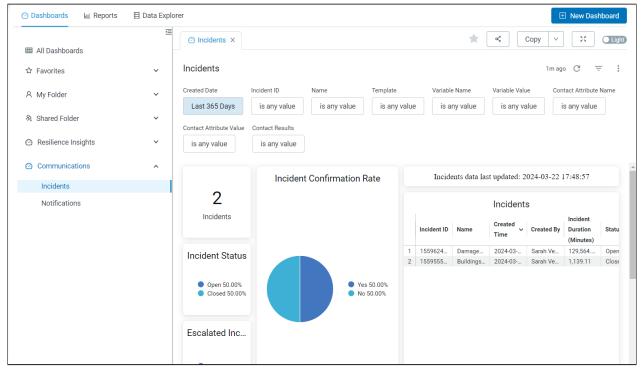
Incidents Dashboard

The **Incidents Dashboard** displays all the Incidents launched in an Organization over a specific period. The Incident data can be filtered across ID, Template, Variables, and Contacts among other filters.

This dashboard helps users understand the Incidents that have been launched in their Organization, and how recipients responded. Users can answer the following types of questions through this preconfigured dashboard:

- How many Incidents did our Organization launch historically?
- · How did our contacts respond to these Incidents?
- How effective were different delivery methods in confirmation of the Incidents?





Incidents Dashboard Filters

The following filters can be applied to the Incidents Dashboard:

Filters	Description
Created Date	The date when the Incident was created.
Incident ID	The ID of the Incident that was created.

Name	The name of the Incidents that were created.
Template	The template that was used to launch the Incident.
Variable Name	The name of the variable attached to the Incident.
Variable Value	The corresponding value of the variable attached to the Incident.
Contact Attribute Name	The name of the attribute attached to a contact.
Contact Attribute Value	The corresponding value of the attribute attached to a contact.
Contact Results	The result of sending an Incident to a contact; whether they have confirmed, not confirmed, or were unreachable.

Incidents Dashboard Widgets

Here is an overview of the widgets comprising the Incidents Dashboard:

Widget	Data	Туре	Description
Incidents Count	Incidents	Numerical Value	The total count of Incidents that were launched over a time period.
Incidents Status	Incidents	Pie Chart	Displays the status of the Incidents that were launched over a time period; whether they are open or closed.
Escalated Incidents	Incidents	Pie Chart	Displays whether the Incidents launched over a time period are escalated or not.
Incident Confirmation Rate	Incidents	Pie Chart	Displays how contacts responded to Incidents launched over a time period (Yes or No).
Incidents	Incidents	Table	Tabular view of individual Incidents launched over a time period containing granular details including duration, average time to acknowledge, status, and more.



Confirmation Rate by Delivery Method	Incidents	Pie Chart	Displays different delivery methods to reach contacts and how they responded (Yes or No) to Incidents launched over a time period.
Confirmation Rate by Attribute	Incidents	Bar Chart	Displays different user-defined contact attributes and the percentage of contacts that confirmed Incidents launched over a time period.
Incident Contacts	Incidents	Table	Tabular view of individual contacts, their attributes, and their responses to Incidents launched over a time period.



Notifications Dashboard

The **Notifications Dashboard** displays all of the Notifications generated in an Organization over a specific period. The Notification data can be filtered across ID, Status, Type, Source, Priority, Escalation, and Contacts, among other filters.

The Notifications Dashboard helps users understand the Notifications that have been launched in their Organization, and how recipients responded. Users can answer the following types of questions through this preconfigured dashboard:

- How many Notifications did our Organization launch historically?
- How did our contacts respond to these Notifications?
- How much time did it take our contacts to respond to the Notifications?
- What were the confirmation results for these Notifications?

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		Confirmed Late Count	28.57%	12	MN	1608209165072651	2024-04-24 12:19:59

Notifications Dashboard Filters

The following filters can be applied to the Notifications Dashboard:

Filters	Description
Created Date	The date when the Notification was created.
Notifications ID	The ID of the Notification that was created.

Title	The title of the Notifications that were created.
Status	The status of the Notifications that were created; whether they were completed or not.
Туре	The type of Notifications that were created; whether they were polling, standard, or conference.
Source	The source of the Notifications that were created.
Priority	The priority of the Notifications that were created.
Escalated	Whether the Notifications that were created were escalated or not.
Content Type	The type of content within the Notifications that were created.
Contact Attribute Name	The name of the attribute attached to a contact.
Contact Attribute Value	The corresponding value of the attribute attached to a contact.
Contact Results	The result of sending a Notification to a contact; whether they have confirmed, not confirmed, or were unreachable.

Notifications Dashboard Widgets

The widgets below make up the Notifications Dashboard:

Widget	Data	Туре	Description
Notification Results	Notifications	Bar Chart	Displays the results of the Notifications that were launched over a time period; whether contacts confirmed, confirmed late, did not confirm, or were unreachable.
Notification Response	Notifications	Bar Chart	Displays the responses of contacts that confirmed for Notifications launched over a time period.
Notifications	Notifications	Table	Tabular view of individual Notifications launched over a time period containing granular details



			including time, status, source, priority, and more.
Notification Contacts	Notifications	Table	Tabular view of individual contacts, their attributes, and their responses to Notifications launched over a time period.

Create New Dashboard

In addition to the preconfigured dashboards, users can create their own custom dashboards to display the data that matters most to them.

To create a dashboard:

1. From the **Dashboards** tab in Advanced Reporting, click **New Dashboard** in the top-right corner.

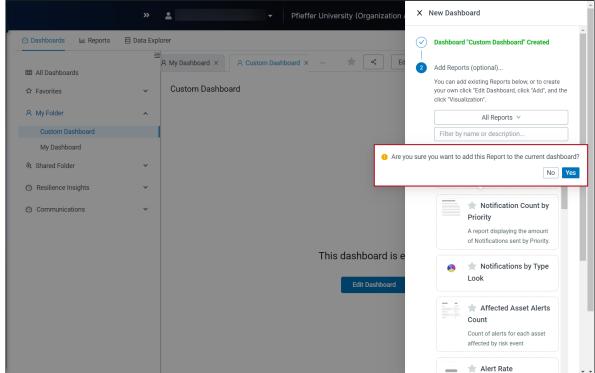
Dashboards 🔟 Reports	E Data Expl							🗄 New Das	shboard
III Dashboards	=	All Dashboards			(Input	search text	Q	×
☆ Favorites A My Folder	* *	Name 🗢	Description	Updated by $\product{\product}$	Updated on	¢		Actions	
久 Shared Folder	~	Alert Analysis	Alert Analysis				Resilience Insights	টী Save a copy favorites	★ Add
② Resilience Insights	~	Alert Trends	Alert Trends				Resilience Insights	Save a copy favorites	🔺 Add
Communications Incidents	^	Alerts Action	Alerts Action				Resilience Insights	Save a copy favorites	★ Add
Notifications		Asset Threat Analysis					Resilience Insights	Save a copy favorites	★ Add
		Country Risk Events from Everbridge RIMC	Country Risk Events from Everbridge RIMC				Resilience Insights	Save a copy favorites	★ Add
		Country Risk Events from Everbridge RIMC (non-US)	Country Risk Events from Everbridge RIMC (non- US)				Resilience Insights	Save a copy favorites	★ Add
		Incidents					Everbridge Template	ී Save a copy favorites	★ Add
		Notifications					O Everbridge Template	Save a copy favorites	★ Add



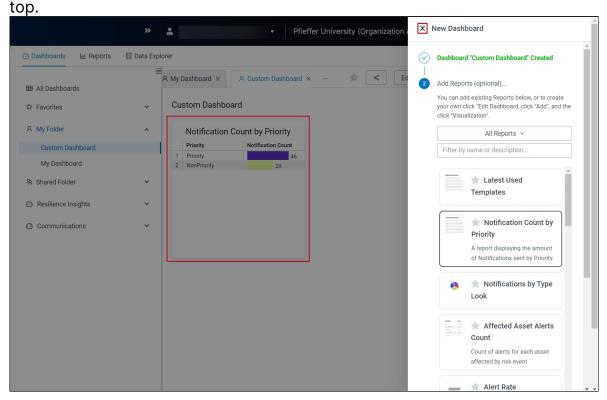
2. The **New Dashboard** side panel will open. Enter a title for your new dashboard, and if desired, give it a brief description.

						Ĭ	Provide a Title and optional Description and then clip
II Dashboards		All Dashboards					Save to create your new Dashboard.
☆ Favorites	~	Name \$	Description	Updated by 🖨	Update on		Custom Dashboard
유 My Folder	^						Description
A Shared Folder	~	Alert Analysis	Alert Analysis				A dashboard with Notification data.
③ Resilience Insights	*	Alert Trends	Alert Trends				Cancel Save
② Communications	^	Alerts Action	Alerts Action				Gancer
Incidents Notifications		Asset Threat Analysis				2	Add Reports (optional)
		Country Risk Events from Everbridge RIMC	Country Risk Events from Everbridge RIMC				
		Country Risk Events from Everbridge RIMC (non-US)	Country Risk Events from Everbridge RIMC (non- US)				
		Incidents					

- 3. Click **Save** to advance to the **Add Reports** section. The preview of the new dashboard can be seen to the left of the panel.
- 4. The optional **Add Reports** section of the modal expands, offering a list of Communication and (if purchased) Resilience Insights reports that can be attached to this dashboard. Use the filters or locate any desired reports, and



5. The report will appear in the preview to the left of the panel. Add as many reports as needed (if any), then close the side panel by clicking the **X** at the top





6. Click **Add** > **Visualization** to create a visualization for this dashboard. See <u>Create Visualizations</u> for more details. Text, buttons, and markdown content can be added to the dashboard, as well.

Al Dashboards		Ē			옷 Custom	Dashboard		« Е	Add Report	Сору		24	Q
Custom Dashboard A My Folder Custom Dashboard A Shared Folder T Markdown T	All Dashboards				F :	0	• • • • • • • • • • • • • • • • • • • •				0		
Custom Dashboard A: Shared Folder Communications T Text Total Number of Number of Successful Attempte Attempte Attempte Attempte Attempte SMS 1 Email 2.5 Phone 4 3 SMS 15 Communications	국 Favorites	~	<u></u>	Add	Filters 32	Settings :	: Quick layout				Cance		Sav
As Shared Folder Besilience Insights Communications Image: Communications <td>२ My Folder</td> <td>^</td> <td>- th</td> <td>Visualizat</td> <td>ion</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>9m</td> <td>ago C</td> <td>ж</td>	२ My Folder	^	- th	Visualizat	ion						9m	ago C	ж
Ashared Folder			B	Text									
Communications Communications Successful L Failed Attempts 2 Survey Successful L Failed Attempts 3 SMS 15 6	Shared Folder	~	т	Markdow	n	Total							
2 Phone 4 4 3 SMS 15 6	Resilience Insights	~	Θ	Button		Successful	Failed						
3 SMS 15 6	Ocommunications	~					2						
				4			•						

7. Click the **Settings** tab in the header bar.

General Filters			
Timezone			
Each tile's time zone			-
Run on load			
Allow full screen mode for visuali	zations		
-	2410110		
Automatically refresh dashboard	201010		
	201010		
	Refresh frequency		
Automatically refresh dashboard		•	
Automatically refresh dashboard	Refresh frequency	•	
Automatically refresh dashboard	Refresh frequency Does not refresh		

Configure the following items as needed under the **General** subtab:

- Timezone
- Run on load
- Allow full-screen mode for visualizations
- Automatically refresh dashboard
- 8. Set the refresh frequency for the individual tiles on the dashboard.
- 9. Click Save once the selections have been made on the General subtab.

10. Click the **Filters** subtab to set the default filters view and filters location.

General Filter		
Default filters view		
Expanded		•
Filters location		
Тор		-

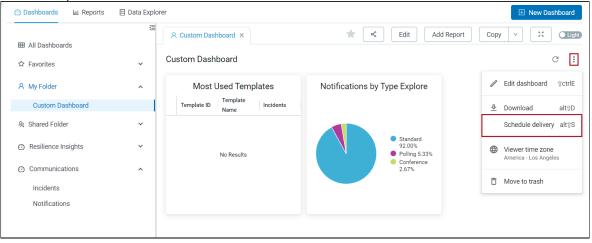
11. Once satisfied with the content and layout of the dashboard, click **Save**. It can always be edited again later as needed.



Schedule Dashboard Delivery

Dashboards can be scheduled to be sent out to stakeholders at specified intervals. To do so:

1. Locate the desired dashboard in the **Dashboard** tab, then click the three-dot icon to open the **Actions** menu.



2. The Schedule Delivery modal appears with the Settings subtab open.

Settings	Filters	Advanced	options		
Schedule Name					
Custom Dasl	nboard				
Recurrence				Time	
Daily			•	06:00	•
Destination					
🚩 Email					•
Email addresses	*			All (1) Ext	ernal (0)
	@everbridge.co	om ×			×
Format					
PDF					•

Specify the following:

- Schedule Name
- Recurrence
 - Send Now
 - Monthly
 - Weekly
 - Daily
 - Hourly
 - Minutes
 - Specific Months
 - Specific Days



- Time
- Email addresses
- Format
 - CSV ZIP file
 - PDF
 - PNG visualization
- 3. If needed, click Advanced Options for additional options.

Settings	Filters	Advanced options		
Custom Message	2			0/150
Add a messa	age to be in	cluded in the body of	the em	ail.
Include lin	ks			
	NO			
Expand ta		w all rows 🛈		
	bles to sho	w all rows 🛈		
	bles to sho	w all rows () les in a single column	I	
Arrange da	bles to sho		I	
Arrange da	bles to sho ashboard ti		1	•
Arrange da Paper size Fit Page To I	bles to sho ashboard ti Dashboard		1	•
Arrange da Paper size Fit Page To I	bles to sho ashboard ti Dashboard		1	•
Arrange da	bles to sho ashboard ti Dashboard e		I	•
Arrange da Paper size Fit Page To [Delivery timezone	bles to sho ashboard ti Dashboard e			•
Arrange da Paper size Fit Page To [Delivery timezone	bles to sho ashboard ti Dashboard e			•

- Custom message
- Include links



- Expand tables to show all rows
- Arrange dashboard tiles in a single column
- Paper size
- Delivery Timezone
- 4. Click **Save**. The dashboard will refresh, and the scheduled delivery will appear. Optionally, click **Send now** to send the dashboard out immediately, or click **New** to create an additional delivery schedule for this dashboard.

) Dashboards 🔟 Reports	Data Explorer	• N	lew Dashboard
II Dashboards	A Custom Dashbo	coard X 🖈 🛋 Edit Add Report Copy V	X O Lig
All Dashboards	Oursteau Daakha		~ .
☆ Favorites	Custom Dashbo		C
K My Folder	^ Most Us	Schedules sed	
Custom Dashboard	Template ID	Terret Nam Custom Dashboard : Send now	
२ Shared Folder	×	Monthly • 1st • 06:00 • Email 1 recipient • PDF •	
Resilience Insights	~ N	No Re	
2 Communications	^	New	
Incidents			
Notifications			

5. Once finished, click **Done** to close the modal.



Reports

The **Reports** tab consists of a library of premade visualizations and tables that answer common Communications and Resilience Insights questions in a standalone, shareable format.

🙆 Dash	nboards 🔟 Reports 🗐 Data Ex	plorer	New Report
	All Reports V	← Click on a report to View or Explore	
Filter by	name or description		
	Affected Asset Alerts Count Count of alerts for each asset affected by risk event		
	Alert Rate Percentage of risk events that got converted into alerts		
	Alert Rate by Source Percentage of risk events that got converted into alerts by source		
*	Alert Trend Trend of total number of alerts by created date		
	★ Alerts Total number of alerts created		

Default Reports

The following reports have been preconfigured for ease of access and use. Note that the default reports cannot be edited. However, users can save their own versions of these reports (including their data points, filters, and visualizations), enabling them to make modifications as needed. These saved versions will appear in a specified folder.

See <u>Save Reports</u> for more information.

Communications Reports

Communications	Description		
Attempts Overview	Number and percentage of attempts by delivery path.		
Confirmation Rate by Contact Groups	Percent of contacts confirmed by contact group.		

Most Used Templates	Number of times Incident Templates were used.		
Open Incidents by Duration	Open Incidents and how long they have been open for (beyond seven days).		
Trends of Failed Attempts	Failed attempts over time via delivery path.		

Resilience Insights Reports

NOTE: Resilience Insights reports are only available to Resilience Insights customers.

Resilience Insights	Description		
Affected Assets Alerts	Count of alerts for each Asset affected by Risk Event.		
Alert Rate	Percentage of Risk Events that got converted into alerts.		
Alert Rate by Source	Percentage of Risk Events that got converted into alerts by source.		
Alert Trend	Trend of total number of alerts by created date.		
Alerts	Total number of alerts created.		
Alerts Tend by Category	Trend of total alerts created each day by category.		
Attempt Acknowledgement Rate per Delivery Path	Percent of acknowledged attempts by day per delivery path.		
Attempt Average Time to Acknowledge per Delivery Path	Average acknowledgment time in minutes per delivery path.		
Attempt Failure Rate	Percent of failed attempts by day per delivery path.		
Attempt Success Rate	Percent of successful attempts by day per delivery path.		
Average Alert Acknowledge Time (in hours)	Average hours to alert acknowledgment per severity.		
Average Incident Launched Time (in hours)	Average hours to Incident creation in hours per severity.		
Average Time to Acknowledge (in minutes)	Average acknowledgment time in minutes per severity.		

Critical Events Created	Total number of Critical Events created.		
Cumulative Count of Impacted Assets	Total number of impacted Assets.		
Details	Details and status of each alert created.		
Escalation Notification	Percentage breakdown of Incidents that were and were not escalated.		
Incident Mean Time to Acknowledge (MTTA)	Mean time to acknowledgment in minutes by creation date.		
Incident Mean Time to Resolve (MTTR)	Mean time to resolution in minutes by creation date.		
Incidents Closed	Total number of Incidents closed by date.		
Incidents Created Count	Total number of Incidents created by date.		
Incidents Created Trend	Trend of total Incidents created by date.		
Incidents Status	Total number of Incidents created by current status.		
Notification Count by Incident	Trend of maximum, minimum, average, and mean Incident Notification count.		
Risk Event Categories	Percent of total Risk Events by category.		
Risk Event Severity	Count of Risk Events by severity.		
Risk Event Trend	Trend of total number of Risk Events by date per severity.		
Risk Events	Heat map of total Risk Events.		
Risk Events Alerts	Details of Risk Event alerts.		
Risk Events Alerts Map	Heat map of Risk Event alerts and impacted Assets count.		
Risk Events Count	Total number of Risk Events.		
Risk Events Source	Total Risk Events by source.		
Top 10 Incidents by Notification Count	Incident name and Notification count for top Incidents by Notification count.		
Top 10 Most Used Templates	Top 10 Incident Templates by count of Incidents created.		
Top 10 Most Used Variable Name & Value Combinations	Top 10 variable name and value combinations with a count of Incidents created.		



Top 5 Categories	Total number of Risk Events for top 5 categories.	
Total Alerts	Total alerts by severity.	
Total Alerts Created	Total number of alerts created.	
Total Number of Risk Events	Total number of Risk Events created.	

View Reports

To view a report from the Reports tab:

- 1. Scroll down the list to find a specific report, or, optionally, enter search terms to find it. You can also hover the cursor over **All Reports** and choose from one of the following options to filter the results:
 - All Reports
 - Favorites
 - My Folder
 - Shared Folder
 - Quick Reports
 - Communications
 - Resilience Insights
- 2. Click the desired report. It will populate to the right with the built-in visualization and data associated with the selected report.

	Communications V				Atte	mpts Overview		just now
ilter by	name or description	-	Filters					
	* Attempts Overview		ttempts Created Date onditionally Required		is any time 👻 🕂	-		
_	Number and percentage of attempts by delivery path		Delivery Path	^	Total Number of Attempts	Total Number of Successful	Total Number of Failed	Percent of Successful
	The confirmation Rate by					Attempts	Attempts	Attempts
4	Contact Groups	1	Email		2,726	11	2,717	0.40
		2	Extension Phone Phone		15	8	7	53.33 100.00
	Percent of contacts confirmed by	4	Mobile App		4	4	13	7.1
	contact group	5	SMS		77	53	24	68.8
	* Most Used Templates Number of times incident templates were used							
	★ Open Incidents by							
	Duration							
	Open incidents and how long they							
	have been open for (beyond seven days)							
-	★ Trends of Failed							
	Attempts							
	Failed attempts over time via							



Create Reports

Users can also create new reports in addition to using the preconfigured reports. To do so:

1. Click **New Report** in the top-right corner of the **Reports** tab.

Filter by name or description			
 Active Incides Affected Assected Count of alerts for ea affected by risk event Alert Rate Percentage of risk event 	on	← Click on a report to View or Explore	
Affected Ass Count Count of alerts for ea affected by risk event Alert Rate Percentage of risk ev	ns by Type		
Count Count of alerts for ea affected by risk event Alert Rate Percentage of risk event	idents		
Alert Rate	r each asset		
	< events that		
Alert Rate by Percentage of risk ev got converted into ale source	by Source		
Alert Trend	d		

2. The **Report Builder** appears. Select the **Report Type** from the drop-down menu to populate available data points and filters to be used in this report.

Analytics > Create Custom Report			
Report Builder	DATA TO DISPLAY		
	(Required - Drag one or more fields to the area be	elow to add columns to your report. You can drag to re-order.)	Remove All
Select a Report Type, then drag fields into the Da (and optional Filter) areas at right.	ata		
Report Type:	FILTERS	filters to be used with your report)	
Notifications	(Optional - Drag fields to area below to configure	niters to be used with your report)	Remove All
Risk Index Analysis			
Assets	Preview Report	Save Report:	
Assets		* Title	
C Response Analytics (Analyze Incidents, Notifications and Response data)		Enter a title for your report	
C Attempts		Description	
N Incidents	-	Enter an optional description	
Notifica [™] pns			
Notification Summary >			
Notifications >			
Template >			Cancel Save
Variable >			
	v		

3. Once the Report Type has been selected, add data points to display as columns in the report by either clicking the **Display** toggle or dragging the data point to the **Data to Display** section. They can be rearranged as needed once they've been added.

We're trying to create a report that shows the number of Notifications sent by Priority in the image below, so the **Priority** field and **Notification Count** measure have been included.

Analytics > Create Custom Report		
Report Builder	DATA TO DISPLAY (Required - Drag one or more fields to the area below to add columns to your report. You can drag to re-order.)	Remove All
Select a Report Type, then drag fields into the Data (and optional Filter) areas at right.		X X
Report Type: Notifications	FILTERS Optional - Drag fields to area below to configure filters to be used with your report)	Remove All
Isast Modified Name Isaunch Type Notification ID	Preview Report Save Report: * Title	
E Priority Usplay Filter	Enter a title for your report	
E Source Display Filter	Description Enter an optional description	
 ■ Text Message ■ Title ■ Title ■ Title 		ĥ
E Type Display Filter Display Filter MEASURES Notification Count		Cancel Save

4. Give the report a title and an optional description.

Title	
Notification Count by Priority	8
escription	
A report displaying the amount of Notifications	ent by Priority. 🔇
	ancel Save

5. Click **Preview Report** for a quick review of how the report will appear once it's finished.

[≪] everbridge ⁻	» 🚊	. • Pfieffer University (Organization Admin) • 😡 💽 Everbridge 360 [™] ©
 w Home (₺) Situational Awareness ☆ Communications ○ Crisis Management ♥ Contacts + Assets ■ Reports + Analytics ■ Reports 	Analytics > Create Custom Report Report Builder Select a Report Type; then drag fields into the Data (and optional Filter) areas at right. Report Type: Notifications	DATA TO DISPLAY (Required - Drag one or more fields to the area below to add columns to your report. You can drag to re-order.) Remove All Image: Notification Count Image:
X Preview Report		
Notifications Priority		Notifications Notification Count
NonPriority		6



6. Once satisfied with the previewed results, click **Save**. This report can now be accessed and run from **My Folder**.

🕐 Dashboards 🛛 🔟 Reports 🗧 Data Expl	rer		💷 New Report
My Folder 🗸	Notificati	on Count by Priority	2m ago
Filter by name or description	Filters Notifications Created Date is 30 days		
★ Notification Count by Priority A report displaying the amount of Notifications sent by Priority.	Priority 1 NonPriority	Notification Count	6



Save Reports

Both default and custom reports can be saved to a user's folder or an Organizational folder. Once saved, these copied reports can be further customized by inheriting the data points and visualizations from the uneditable default report to better meet specific use cases.

To save a report:

- 1. Select the desired report from the **Reports** tab. In this example, we selected a default report: Latest Used Templates.
- 2. Click the cogwheel icon to open the **Actions** menu, then select **Save** > **Save**

Communications V		Latest	t Used Templates		just now
ilter by name or description	✓ Filters			Explore from her	e CTRL + ALT +
more than 1 notifications	Incidents Created Date Conditionally Required	is any time 👻 🚽	ŧ		
	Conditionally Required			Edit	
🔶 🔺 Incidents With			As a new dashboard 🕆 + CTRL + S	Save	
Attachments	Template ID	Templa	To an existing dashboard @+CTRL+A		⊕+ CTRL -
	2 100763529799275	Miscel		1	
🔶 🄺 Incidents With Map	3 171414292267008	Ad-Hoo		Send	ALT + 🕆 -
	4 1725962672668684	SOS AI	ert	Schedule	ALT + CTRL
🛧 Latest Used					
Templates				Merge results	
Most Used Templates				Move to trash	
Open & Closed Incidents					
🕳 🔺 Opened incidents					
🚔 ★ Recent incidents					

3. The **Save Look** modal appears. Enter a title and an optional description that will populate in the list view.

Save Look	×	
A Temporary changes to fi	ilters will not be reflected in saved version.	
Title	Latest Used Templates	
Description optional		
Folder	My folder	
My folder	Filter by title	
Group		
	Save & View Look	

- 4. Choose which folder the report should be saved in.
- 5. Click Save & View Look once the selections are made.
- 6. Check the folder that this report was saved to. Once located, click the **Actions** menu, which has more options now on this version of the report than the default, unchangeable version. It's now editable and can be adjusted to



meet different use cases.

🕑 Dashboards 🔛 Reports 🗄 Data Exp	blorer						New Report
My Folder 🗸		l	atest Used Templates				47m ago
Filter by name or description	✓ Filters Incidents Created Date					Explore from he	re CTRL + ALT + E
🛓 🚖 🖈 Latest Used Templates	Conditionally Required	is in the year	▼ 2024 +			Edit	
★ Notification Count by	Template ID		Template Name	Re		Save	•
Priority	1 1559899372781679		Damaged Building		⊉	Download	transformed to the second sec
A report displaying the amount of Notifications sent by Priority.						Send	ALT + 🕆 + S
Hornoulono den by Horny.						Schedule	ALT + CTRL + S
						Edit settings	CTRL + CTRL + E
						Merge results	
						Move to trash	



Send and Schedule Reports

Reports can be sent to recipients immediately or scheduled to be sent at a recurring date and time.

Send Report

To send a report immediately:

1. Click the cogwheel icon to open the drop-down Actions menu, and select **Send Report**.

🕑 Dashboards 🔟 Reports 🗏 Data Exp	lorer		
All Reports ∨	Notifi	cation Count by Priority	38m ago
Filter by name or description	Filters Notifications Created Date is 30 days Priority	Notification Count	Explore from here CTRL + ALT + E
Notification Count by Priority	1 NonPriority	Notification Count	Edit
A report displaying the amount of Notifications sent by Priority.			Save >
- 📩 Active Incidents			Send ALT + 12 + S Schedule ALT + CTRL + S
Affected Asset Alerts Count Count of alerts for each asset affected by risk event			Edit settings CTRL + CTRL + E Merge results
Alert Rate			Move to trash
Percentage of risk events that got converted into alerts			
Alert Rate by Source Percentage of risk events that got converted into alerts by source			

2. The **Send Report** modal opens. Enter a title and the recipients' email addresses. Note that the sender's email address is included by default but



can be removed by clicking the X.

nd Notification Count by Priority	y	
Title	Give your schedule a name. Notification Count by Priority	
Where should this data go?	Ver ail	
Who should it be emailed to?	Add recipients, use commas for multiple addresses @everbridge.com × Include a custom message	Add
Format data as	Data Table Visualization CSV XLSX JSON – Simple Text HTML HTML	
Filters Notifications Created Date Advanced options	matches the user attribute "default_explore_time_period"	
		Send

- 3. Select the data format for the report from one of the following options:
 - Data Table
 - Visualization
 - CSV
 - XLSX
 - JSON Simple
 - Text
 - HTML

4. If more granularity is needed, consider applying some optional data filters:

Notifications Crea	matches a user attril	Default explore Time Per	iod (30@	£≡ +
	is in the past is on the day			
 Advanced options 	is in range is before			
Limit	is on or after is in the year	Email options	Include	links
● Results in Table ○ All Res	is null is any time is not null	Format options		risualization options ted data values
	matches a user attribute matches (advanced)			

- 5. Additional optional settings can be configured under Advanced Options:
 - Limit
 - Results in table
 - All results
 - Email Options
 - Include links
 - Format Options
 - Apply visualization options
 - Formatted data values
- 6. Click **Save** once all of the selections have been made. The report will be sent to the recipients' email addresses using the specified parameters.

Schedule Report

Reports can be scheduled to be sent to recipients at specific intervals or as a datagroup update. To schedule a report:

1. Click the cogwheel icon to open the drop-down **Actions** menu, and select **Schedule**.

🕑 Dashboards 🛛 🔤 Reports 🗧 Data Exp	blorer		া New Repor
All Reports \vee	Notificat	ion Count by Priority	2h ago
Filter by name or description	Filters Notifications Created Date is 30 days Priority 1 NonPriority	Notification Count	Explore from here CTRL + ALT + Edit
A report displaying the amount of Notifications sent by Priority.			Save)
📥 🚖 Active Incidents			Send ALT + Ձ + Schedule راسی ALT + CTRL +
Affected Asset Alerts Count Count of alerts for each asset affected by risk event			Edit settings CTRL + CTRL + Merge results
Alert Rate Percentage of risk events that got converted into alerts			Move to trash
Alert Rate by Source Percentage of risk events that got converted into alerts by source			

2. The **Schedule Report** modal appears. Enter a title and the recipients' email addresses. Note that the sender's email address is included by default but can be removed by clicking the **X**.

Notification Count by Priority Email (1) > HTML Table > Daily	Give your schedule a name.	Give your schedule a name. Notification Count by Priority]
Notification Count by Priority Email (1) > HTML Table > Daily		Notification Count by Priority	
	Where should this data go?		
		e Email	
	Who should it be emailed to?	Add recipients, use commas for multiple addresses	Add
	Format data as	Data Table Visuelization CSV XLSX JSON - Simple Text HTML	
	Trigger	Repeating interval Datagroup update	
	Deliver this schedule	Daily O Weekly O Monthly O Hourly O By minute	
		Send At Every day e 6 e : 00 e AM e	
	Filters Notifications Created Date	matches the user attribute 'default_explore_time_period'	
	Advanced options		
	Send Test		



- 3. Select the data format for the report from one of the following options:
 - Data Table
 - Visualization
 - CSV
 - XLSX
 - JSON Simple
 - Text
 - HTML
- 4. Specify if a repeating interval or a datagroup update should trigger the schedule. For this example, we'll set the trigger to **Repeating interval**.
- 5. Choose from one of the following delivery intervals:

Deliver thi	s schedule			
○ Daily	Weekly	O Monthly	\bigcirc Hourly	\bigcirc By minute
Send				
Friday	\$			
At				
	00 \$ A			

- Daily
 - Every day
 - On weekdays only
 - On specific days of the week
- Weekly
 - Select from Sunday through Saturday
- Monthly
 - Every month
 - At the start of every quarter
 - In specific months
- Hourly
 - 1 hour
 - 2 hours
 - 3 hours
 - 4 hours
 - 6 hours
 - 8 hours
 - 12 hours
- By minute



- 5 minutes
- 10 minutes
- 15 minutes
- 20 minutes
- 30 minutes
- 6. <u>If more granularity is needed, consider applying some optional data filters:</u>

Notifications Crea		matches a user attril		+	
	Defau	is in the past is on the day is in range is before	£ ⊒		
Advanced options		is on or after is in the year is null			
Send Test		is any time is not null			
		matches a user attribute matches (advanced)	Cano	-el	Save



7. Additional optional settings can be configured under Advanced Options:

Send this schedule if	Email options	✓ Include links
there are either results or no resu 🕏		
there are results		 Apply visualization
there are either results or no results	Format options	options
Limit		Formatted
Results in Table All Results		data values
	Timezone	America 🕈
Send Test		

- Limit
 - Results in table
 - All results
- Email Options
 - Include links
- Format Options
 - Apply visualization options
 - Formatted data values
- Timezone

8. If desired, click **Send Test** to receive a test version of the report as a preview.

Send this schedule if	T 1	Include
there are either results or no resu \$	Email options	links
		🗸 Apply
and results changed since last run	Format options	visualizatior options
Limit	r onnut op nono	Formatted
● Results in Table 🔿 All Results		data values
	T :	America A
	Timezone	America 🕏
Send Test 🗸 On its way!		

9. Click **Save All**. If multiple schedules need to be set for the same report, more can be created by clicking the **New** button at the top of the **Schedules**



column.

Schedule Notification Count by Priorit	у	×
Schedules New	Give your schedule a name.	
Notification Count by Priority	Give your schedule a name.	
Email (1) > HTML Table > Daily	Notification Count by Priority]
	Where should this data go?	
	Who should it be emailed to?	
	Add recipients, use commas for multiple addresses	dd
	sarah.venezio@everbridge.com ×	
	Format data as	

Download Reports

Reports can be downloaded in a variety of data formats and visualizations. To do so:

- 1. Select the report in question from the **Reports** tab.
- 2. Click the cogwheel icon to open the Actions menu, then select Download.

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	unt of alerts for each asset ected by risk event			Merge results	
				Move to trash	
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got	converted into alerts				
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	centage of risk events that				
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3. The Download modal appears.

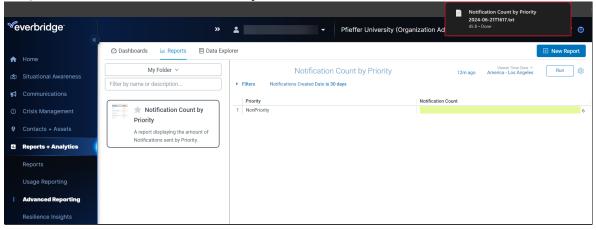
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Notification Count by Priority 2024-06-21T1608		
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As displayed in the data table		
Data values		
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O Unformatted (no rounding, special characters, etc.)		
Number of rows and columns to include		
Current result table		
O All results		
Custom		
Open in Browser	Cancel	Download

Make the following selections:

- Format
 - TXT
 - Excel Spreadsheet
 - CSV
 - JSON
 - HTML
 - Markdown
 - PNG (image of the visualization)
- Filename
- Results
 - With visualizations options applied
 - As displayed in the data table
- Data values
 - Formatted
 - Unformatted (no rounding, special characters, etc.)



- Number of rows and columns to include
- 4. If desired, click **Open in Browser** to see a web-based version of the report. If not, click **Download** to save it to your device.



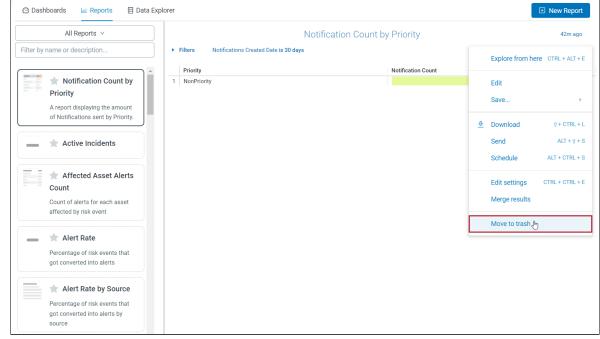
Delete Reports

A custom report can be deleted if it's no longer needed.

NOTE: The default, out-of-the-box reports cannot be deleted.

To delete a report:

- 1. Select the report in question from the Reports tab.
- 2. Click the cogwheel icon to open the Actions menu and select Move to trash.



3. Click **OK** on the popup modal at the top of the page to confirm the deletion.

				An embedded page at looker.everbridge.net says			📔 🗅 All Bookma
°€	everbridge ⁻			Are you sure you want to move this Look to the trash?	:y (Organization Admin) 👻	😧 💽 Everbr	idge 360™ ⊜
ŧ	Home	② Dashboards Main Reports	🗏 Dat				🗄 New Report
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+	Travel Risk Management	Alert Rate				Move to trash	



Data Explorer

New visualizations and table widgets can be created from the **Data Explorer** tab by pulling information from multiple data stores across Everbridge Suite.

The following data stores can be used in the Data Explorer tab:

- Attempts
- Notifications
- Incidents
- Assets

Resilience Insights customers also have access to additional items:

- Risk Events
- Risk Events and Alerts
- Risk Index Analysis



Create Visualizations

To create a new visualization or widgets:

- 1. Navigate to Advanced Reporting > Data Explorer.
- 2. Select the desired data type from the drop-down menu.

°€	everbridge ⁻	>> ▲ Pfieffer University (Organization Admin) → 😧 💽 Everbridge 360° ⊙
÷		🔿 Dashboards 🔟 Reports 📋 Data Explorer
മ	Situational Awareness	Choose Data Type V
4	Communications	Analyze Risk Events Risk Events
0	Crisis Management	Risk Events and Alerts
¢	Contacts + Assets	Risk Index Analysis Assets
ı.	Reports + Analytics	Assets
	Reports	Response Analytics (Analyze Incidents, Notifications and Response data)
	Usage Reporting	
I.	Advanced Reporting	
	Resilience Insights	
*	Travel Risk Management	
¥		
۵	Settings	

- 3. The **Explore** panel for the selected data type (Notifications, in this example) will appear, including a list of available fields to the left. Two items are required to create a visualization (bar chart, pie chart, line graph, etc.):
 - **Dimension** Used to group or identify data for analysis. Think of dimensions as the *x*-axis or the independent variable.
 - **Measure** Measures represent the quantities of the data (total counts, sums, or averages). A measure acts as the *y*-axis or the dependent

variable.

🕑 Dashboards 🛛 🔟 Reports 📃 Data Exp	orer
Choose Data Type V	
Explore	Run 2ĝ3
Notifications ⓒ	Filters Notifications Created Date is 30 days
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Q Start typing to search	
All Fields In Use	
Custom Fields + Add	
 Attempts 	
Contact Attributes	
Contact Log	
 Notification Responses 	
 Notification Results 	
 Notification Summary 	C1
 Notifications 1 	Select some dimensions or measures.
Template	
➤ Variable	

- 4. Choose a Dimension and a Measure, which will appear on the list to the right once selected. In this example, we want to create a visualization representing the breakdown of the Notifications launched by an Organization by Type. To do this apply:
 - **Dimension**: *Notifications* > *Type*
 - Measure: Notifications > Measure

	Data Explo	
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225 fields 225 displayed	- ·	
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5. Choose what kind of visualization should be created from the **Visualization** dropdown. We'll choose a **Pie Chart** for this example.

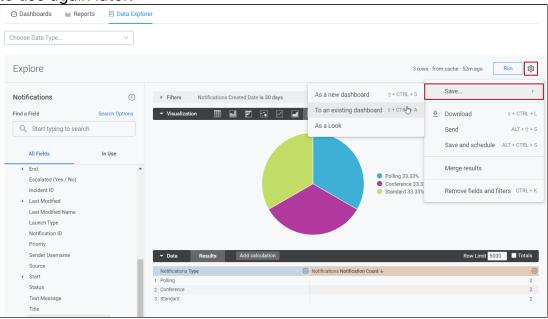
② Dashboards <u>M</u> Reports	s 📄 Data Explorer		
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Q Start typing to search			
All Fields	In Use		
▶ End			
Escalated (Yes / No)		Press "Run" to explore this data.	
Incident ID			
 Last Modified Last Modified Name 			

6. Once the Dimension, Measure, and Visualization values have been applied, click **Run** in the top-right corner of the page to generate the visualization, which will appear below.

		_		
Choose Data Type	~			
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Find a Field	Search Options	- Visualization 🔠 🖬	E : 🖉 🖬 🔕 🗞 6 ·	•• 🛷 Forecast 🛱 Edit
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Notification Count				

- 7. This visualization can be saved by clicking on the cogwheel to open the menu, hovering over **Save**, and then selecting one of the following options:
 - As a new dashboard Save this visualization as a dashboard.
 - To an existing dashboard Save and add this visualization to an existing dashboard.

• As a Look - This saves applied filters, visualizations, fields, sorting, etc. to use again later.





Download a Visualization

To download a visualization:

- 1. Repeat **Steps 1-6** of <u>Create Visualizations</u> or navigate to an existing visualization.
- 2. Click the cogwheel to open the menu, then select **Download**.

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3. The **Download** modal will appear.

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Number of rows and columns to include		
Current result table		
O All results		
O Custom		
Open in Browser	Cancel	Download

Set the following options:

- Format
 - TXT
 - Excel Spreadsheet
 - CSV
 - JSON
 - HTML
 - Markdown
 - PNG
- Filename
- Results
 - With visualization options applied
 - As displayed in the data table
- Data Values
 - Formatted
 - Unformatted
- Number of rows and columns to include
 - Current result table
 - All results
 - Custom



4. Click **Download**, or optionally, **Open in Browser** to view a browser-based version of the file, instead.

Explore Assistant

The AI-powered **Explore Assistant** helps users automatically create visualizations based on their Incident and Alert history, Assets, and Risk Events by entering a text-based prompt to be parsed into applicable fields and filters.

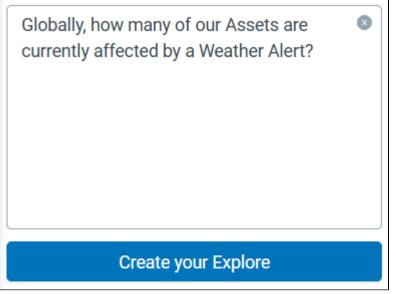
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		week?	т ныма ј т марлауси	Powered by & Looker

IMPORTANT: The AI-generated Explore serves as a starting point, and results may vary. Adjust the automated fields, filters, or visualization as needed to isolate the desired data or clarify the wording in the prompt and try again.

Using Explore Assistant

To start using Explore Assistant, navigate to **Advanced Reporting** > **Explore Assistant**. From there:

1. Enter a prompt in the field in the top-left corner describing the type of data that should be received, then click **Create Your Explore**.



• Refer to the **Examples** section below for effective prompts to use in Explore Assistant. Examples are organized by data type: Risk Events, Assets, and Alerts. Simply click an example to run the corresponding

prompt.

Examples Recent History
Data Type:
Risk Events ~
What were the most common types of risk near Cairo, EG the last 2 quarters?
Show me the trend of risk events by type for the last quarter.
What were the most common types of crime risk events in Istanbul the last 4 weeks?
What does the severity of the risk events in the Rome area look like over the past 7 weeks?
What were the sources of risk events for last week?

• Click **Recent History** to see a list of the most recently used prompts. A prompt can be run again by clicking on it, or the list can be wiped by

selecting Clear.

Examples	Recent History	clear
Globally, how n affected by a V	nany of our Assets are o Veather Alert?	currently
How many Ale Assets?	rts are currently affectir	ig our
How many acti Ukraine right n	ive Risk Events are there ow?	e in
How many Aler three years?	rts were sent out within	the last
-	ifications were sent but targeted audience in th years?	

- 2. Explore Assist will automatically apply any relevant filters or fields based on the query and display the preliminary results in the **Explore** section. Review the following areas and adjust the criteria as needed:
 - The applied fields can be seen under the **In Use** tab. Switch to the **All Fields** tab to add more as needed.

Veverbridge

Risk Events and Alerts	\odot
Find a Field	Search Options
Q Start typing to search	
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Total Number of Alerts	
- Assets	
Name	Ŧ
 Risk Events Alerts 	
Category	Ŧ
Effective Date • Effective Date	Ŧ
Clear all Clear fields keep filters	
4 fields 4 displayed	

Risk Events and Alerts	\odot
Find a Field	Search Options
Q Start typing to search	
All Fields	In Use
Custom Fields	+ Add
Alert Action Summary	
Alerts	1
Alerts Action History	
Alerts Affected Asset By Proxin	nity
 Assets 	1
Assets Properties	
Crisis Event Incident	
Crisis Events	
 Crisis Task 	
 Incidents 	
Notifications	
Risk Events Alerts	2

 Under Filters, check that the correct data points and filters were applied from the prompt. If not, adjust as needed.

▼ Filters			
	🔅 Assets Name	is not blank \bullet + \times	
	🔅 Risk Events Alerts Category	is 👻 Weather X	× • + ×
AND	Risk Events Alerts Effective Date Conditionally Required	matches a user attribute 💌	Default explore Time Period (30 days) 👻
	+ Filter		
+ New grou	up + Custom expression		



 Explore Assistant will choose a visualization that best meets the prompt's criteria, but it can easily be changed by clicking any of the different options in the Visualization section. Some visualizations provide more detailed information by clicking on the elements they contain.

					<u>96</u>]				
۵ ۵	Alert Acknowledge	LERTS (4 Filter Category	rs) ~ Severity	Effective Date	Source	Headline	Description	Explore 👲 Affected Asset Count	Download Time to Acknowledge (in minutes)	>
A	Alert			Effective Date	Source OPERATORENT EREDRISK	Headline Label: risk_items_quer y Automation Polygon: Create REI OER Polygon: All data test Weather - Sev: Extreme 1731679612		Affected Asset	Time to	

3. Once satisfied with the data and format of the Explore, it can be utilized in several ways by clicking the **Options** cogwheel in the top-right corner.

ADVANCED REPORTING GUIDE



*			« 🛓	€ Everbridge 360 [™] Ø
*	② Dashboards 🔟 Reports 📄 Data Ex	xplorer		
® ₽	Globally, how many of our Assets are Currently affected by a Weather Alert?	Explore	449 rows - from cache - 8m	Viewer Time Zone ~ Run 2004
ភ		Risk Events and Alerts (3)	Filters Assets Name is not blank AND Risk Events Alerts Category is Weather	Save >
€		Find a Field Search Options Q_ Start typing to search	- Visualization 🏢 🖬 🗾 记 🗹 🖬 🛇 0 💪 …	<u>Φ</u> Download ⊕ + CTRL + L Send ALT + ⊕ + S ALT + ⊕ + S
*	Create your Explore Disclaimer: The Al-generated "Explore" is a starting point and results will vary. Customize the fields, filters, or visualization	All Fields In Use		Save and schedule ALT + CTRL + S Merge results
* *	or try again if it does not meet your needs! Examples Recent History clear	Custom Fields + Add Alert Action Summary		Remove fields and filters CTRL+K
⊻ ✿	Globally, how many of our Assets are currer	Alerts 1	96	
	affected by a Weather Alert? How many Risk Events occurred Tampa,	Alerts Affected Asset By Proximity Assets 1		
	Florida during Hurricane Helene in September?	Assets Properties Crisis Event Incident		
	How many Risk Events occurred Tampa, Florida during Hurricane Helene a couple months ago?	Crisis Events Crisis Task		
		Incidents Matifications		

Select one of the following options:

- Save
 - As a new Dashboard
 - To an existing Dashboard
 - As a Look

• **Download** - Choose a file format, data format, result types, and data values to download the results.

Format	
TXT (tab-separated values)	v
Filename	
risk_events_look_ml risk_events_alerts 2024-11-18T1119	
Results	
With visualizations options applied 1	
 As displayed in the data table 	
Data values	
Data values Formatted	
 Formatted Unformatted (no rounding, special characters, etc.) 	
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Formatted Unformatted (no rounding, special characters, etc.) Number of rows and columns to include	
 Formatted Unformatted (no rounding, special characters, etc.) Number of rows and columns to include Current result table 	
 Unformatted (no rounding, special characters, etc.) Number of rows and columns to include Current result table All results 	
 Formatted Unformatted (no rounding, special characters, etc.) Number of rows and columns to include Current result table All results 	

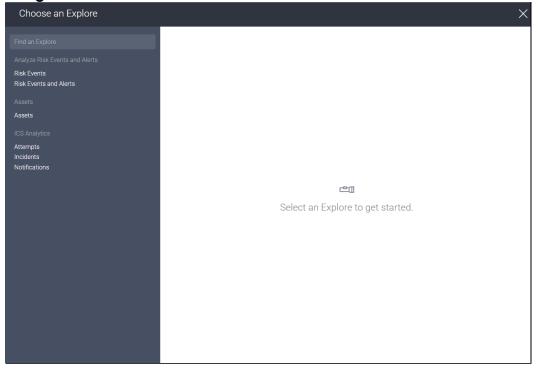
• **Send** - Add a name, data format, and recipient email addresses to send the results to other users.

Title	Give your schedule a name.	
	Risk Events Look MI Risk Events Alerts	••••
Where should this data go?	2 Email	
Who should it be emailed to?	Add recipients, use commas for multiple addresses Image: second	Add
Format data as	Data Table Visualization CSV XLSX JSON - Simple Text HTML	
Advanced options		

• Save and schedule - Add a title, optional description

Save Look		\times
 You must save a Look before 	re it can be scheduled.	
Title		
Description		
optional		h
Folder	My folder	
My folder	Filter by title	
Group		
	This folder is empty.	
	Save & View	w Look

• Merge Results





• Remove fields and filters

Explore Assistant Feedback

Explore Assistant may not immediately provide the desired content, and learns from user input. If users are dissatisfied with a response, they're encouraged to leave detailed feedback in the field found at the top of the page, and then adjust their prompt or manually apply the desired fields as needed.

Help improve future results by rating the response:	凸 Looks good	P Needs improvement		
Optional: Share your thoughts				×
			Send Cancel	