Scheduling User Guide

Everbridge Suite

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About Scheduling

The **Scheduling** module offers a Calendar interface where users can maintain multiple Calendars in an Organization, multiple shifts on a Calendar, and manage shift assignments and staff availability.

It allows customers to create Calendars, and manage shifts and on-call staff so that when an Incident or Notification is launched, proper on-call staff members are notified, and escalations occur when responses do not meet response quotas defined in the Incident.

Workflow Overview

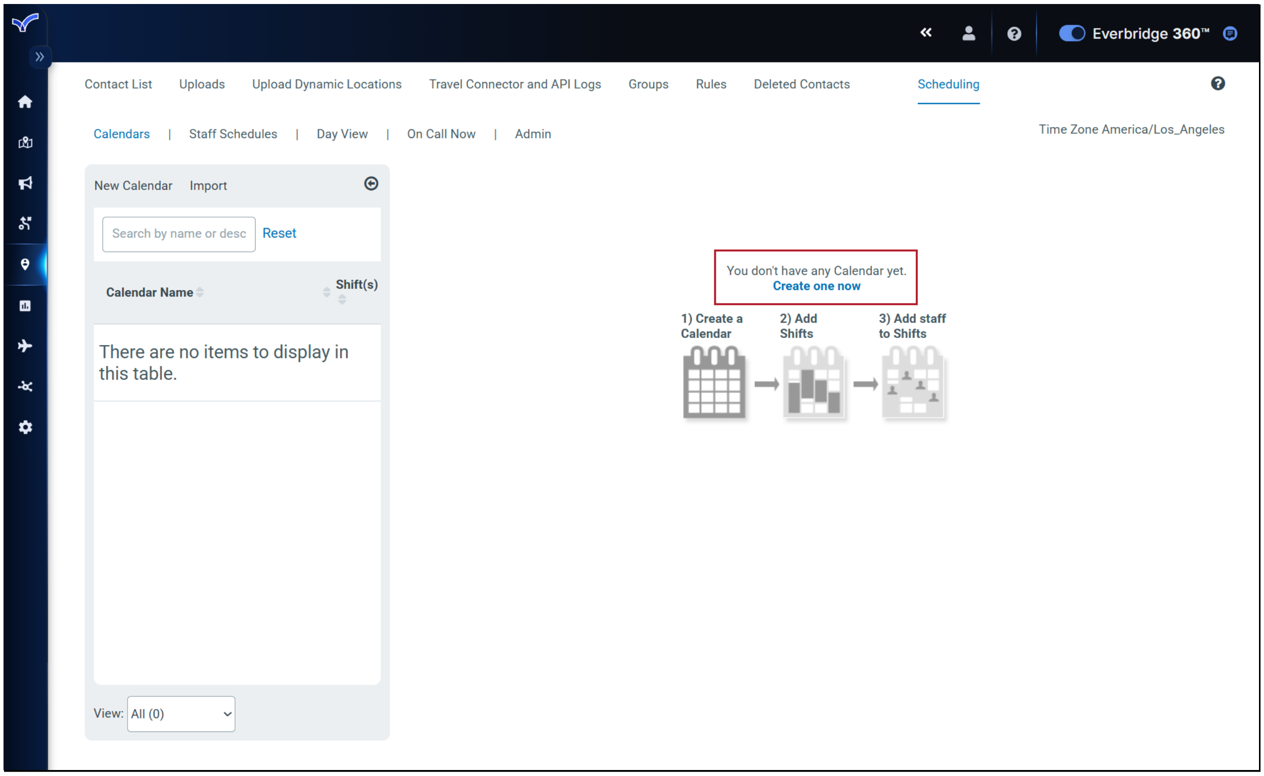
When creating a schedule, first, you need to analyze your schedule. Identify the shifts and the shift schedules. Then, identify your escalation levels and their rotations if any.

Schedules consist of a Calendar, shifts, and staffing layers. Calendars hold the work schedule of the team. When launching an Incident or a Notification, a Calendar can be used to dynamically select individuals scheduled at that time.

Each Calendar contains a set of shifts to match coverage times. Multiple Calendars can be created to cover different time frames or situations.

To set your schedule, navigate to **Contact** > **Scheduling**.

The first time you access the **Scheduling** page, you are prompted to create a Calendar.



Once Calendar has been created, it's time to add shifts, and then add staff to the shifts.

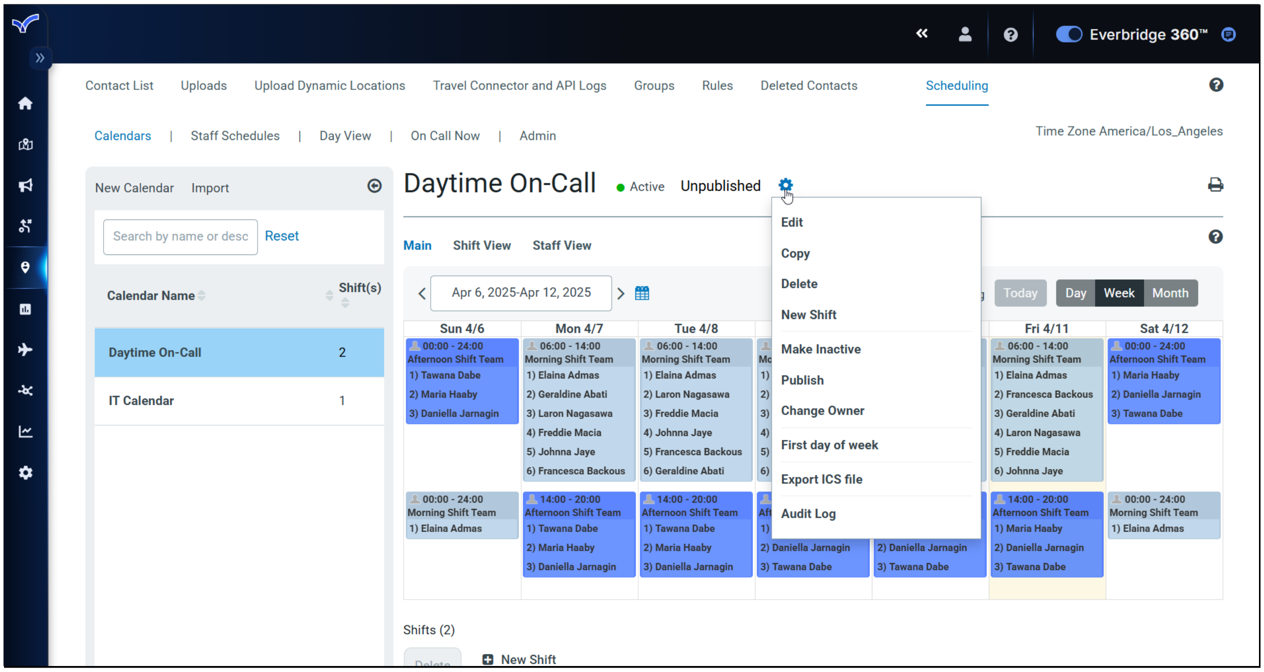
Besides the Calendar view, you can also view by Shift or Staff. This allows you to swap shifts as needed and handle understaffed shifts. You can use automated email Notifications to monitor changes (when the Calendar is made "active").

Shift and Shift Schedule

A shift is a block of time. For example, 8:00 AM to 5:00 PM is a shift. Shifts have their own time zones, and time changes will follow the time zone of the shift.

A shift schedule includes the days. It could be a weekly shift from Sunday through Saturday, an 8-day shift, a night shift for the block of time, a weekend shift, or a split shift (where some staff members work a portion of the day and another set of staff members work the other part of the day), or a fixed number of days.

Once a Calendar has been created, as many shifts can be added to as needed. In **Shift** view, you can see the shifts on a Calendar and, later, the individuals staffing each shift. Each staff member is displayed on the Calendar by "name (external ID)". The Information icon next to a shift name provides more details about that shift.

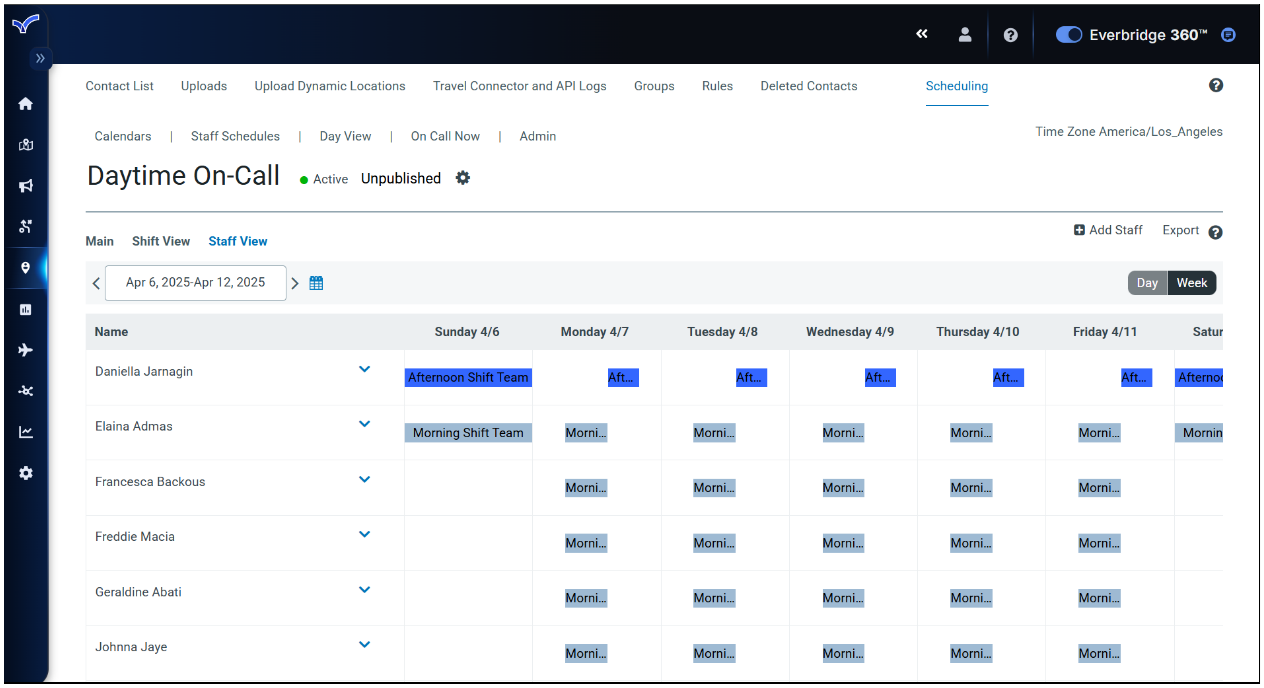


Staff

Staff are the people assigned to a shift. A shift contains staffing layers which can contain different sets of contacts who are part of the shift. Each layer can use a specific rotation.

A staffing layer is a unique name for different staff in the same shift. For example, one layer might be a team leader who works Monday through Friday, where another layer lists the staff who work Monday through Wednesday, and yet another layer of staff who work Thursday through Friday.

When you have a shift, you can add staffing layers and corresponding staff to the layers. In **Staff View**, staff members, including groups, are listed alphabetically by first name along the left-hand side, and their shifts are shown in the Calendar.

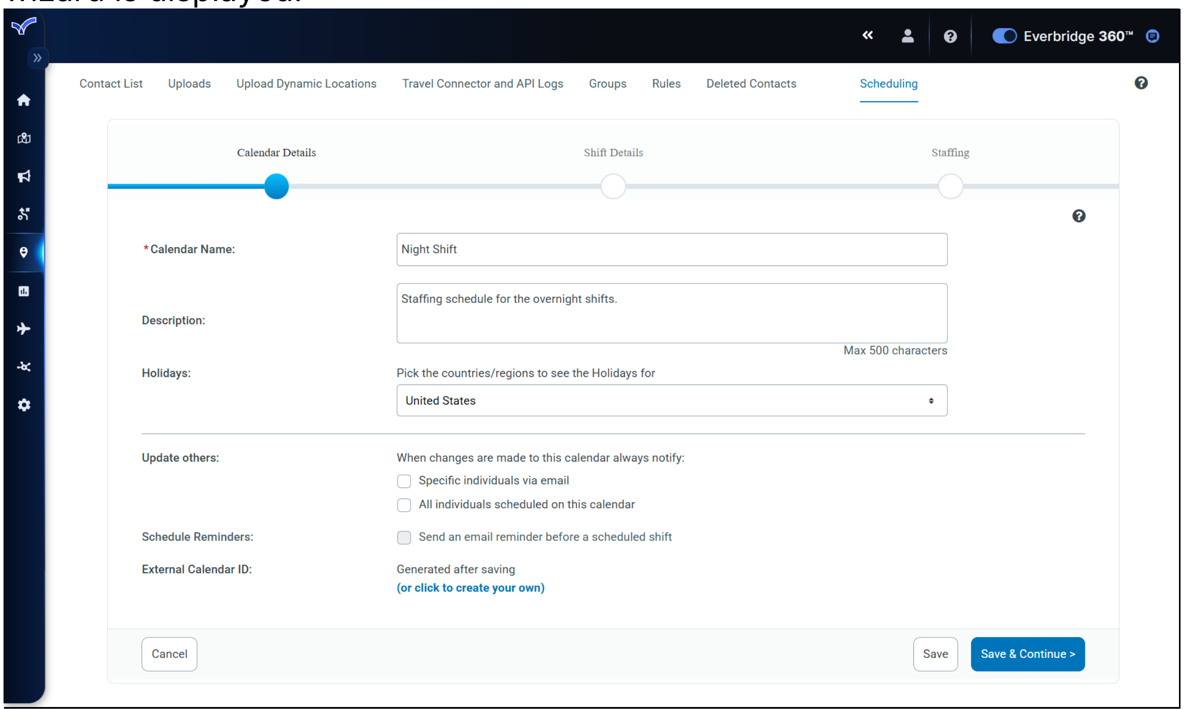


In the case of a sequenced shift, layers are ordered in the order of the escalation sequence.

Creating a Calendar

To create a Calendar:

1. Navigate to **Contacts** > **Scheduling** and click **New Calendar** (or create one now if it is the first time you are accessing Scheduling). The New Scheduling wizard is displayed.



2. Provide a unique Calendar name and a description (up to 500 characters).
3. This description is displayed in the Calendars view and in the Member Portal, if needed.
4. Optionally, from the **Holidays** drop-down list, select one or more countries/ regions from the drop-down list to have your Calendars display the name and country flag(s) on the dates of the national holiday.

> **NOTE:** The holidays are displayed on the Calendar Main view.

5. Optionally, select **Update Other** when changes are made to the Calendar. An email is sent to the specified people each time a change is made either to the Calendar, a shift, a staffing layer, or when a staff changes its schedule (create or delete an unavailability). Those notifications ONLY occur once the Calendar is active.
   - **Specific individuals via email**: you can specify any email addresses separated by a comma.

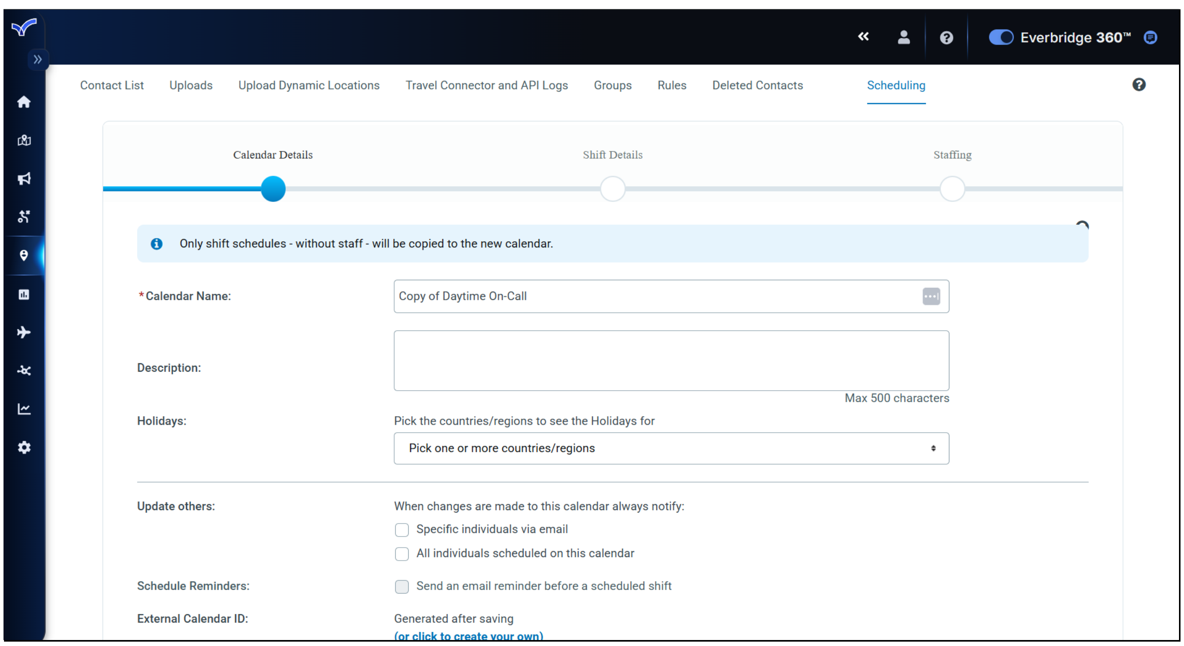
- **All individuals scheduled on this Calendar**.

6. Optionally, select if you want to send a reminder email for the on-call staff prior to their scheduled shift (see the On-call Reminder section for more details).
7. Optionally, specify an **ID number** for your Calendar. If no ID is specified, one is automatically generated after the Calendar is created.
   - If using APIs, select the link: **Generated after saving (or click to create your own)**. A text box is displayed from which you enter the **External Calendar ID**. Do not use any spaces in your External ID. (Even if the Calendar is renamed, it keeps its ID.)
8. The Calendar is created once you click either **Save** or **Save & Continue**.
   - Select **Cancel** to return to the main page without saving.
   - Select **Save** to save your Calendar.
   - Select **Save & Continue** to continue setting your schedule for this Calendar.

Copying a Calendar

To copy a Calendar:

1. From the **Scheduling** subtab, ensure that the desired Calendar Name in the left-hand pane is selected.
2. Click the **Copy Calendar with shifts (no staffing)** icon of the highlighted Calendar or select **Copy** from the **Action** menu. The create wizard is opened and displays the Calendar Details.



3. Give the Calendar a new meaningful name (unless you want it to be named "Copy of Xxx" where Xxx is the name of the original Calendar).
4. Optionally, type or replace the existing Calendar description.

5. Optionally, select the **Update Others** checkboxes: When changes are made to this Calendar, always notify:
   - **Specific individuals via email**.
     - Enter email addresses for those who should be notified of changes and have not been staffed.
     - Separate each email address with a comma.
     - If the check box is not selected, the email notification does not work.
     - If the Calendar is inactive, the email notification does not work.
     - If the Calendar is active, changes are sent to the email address(es) entered here. Also, if you have removed a staff person from the Calendar, all associated staff are notified, as well as the Calendar owner/creator.
   - **All individuals scheduled on this Calendar**.
6. From the **Schedule Reminders** field, optionally select the checkbox: **Send an email reminder before a scheduled shift** (see On-Call Reminders for more details).

   > **NOTE:** If the On-Call Reminder option is not enabled for the Organization, the checkbox is grayed out.

7. In the **External Calendar ID** field, do one of the following:
   - If using APIs, select the link: **Generated after saving (or click to create your own)**. A text box is displayed from which you enter the **External Calendar ID**. Do not use any spaces in your External ID. (Even if the Calendar is renamed, it keeps its ID.)
   - Otherwise, skip to the next step. The system auto-generates an external Calendar ID.
8. Under **Shift Schedules**, select one:
   - **Leave all shift dates/times as they are.**
   - **Convert all shift end dates to 'no end date'**.
9. Click **Save** or **Save & Continue**.

Creating Shifts and Shift Schedules

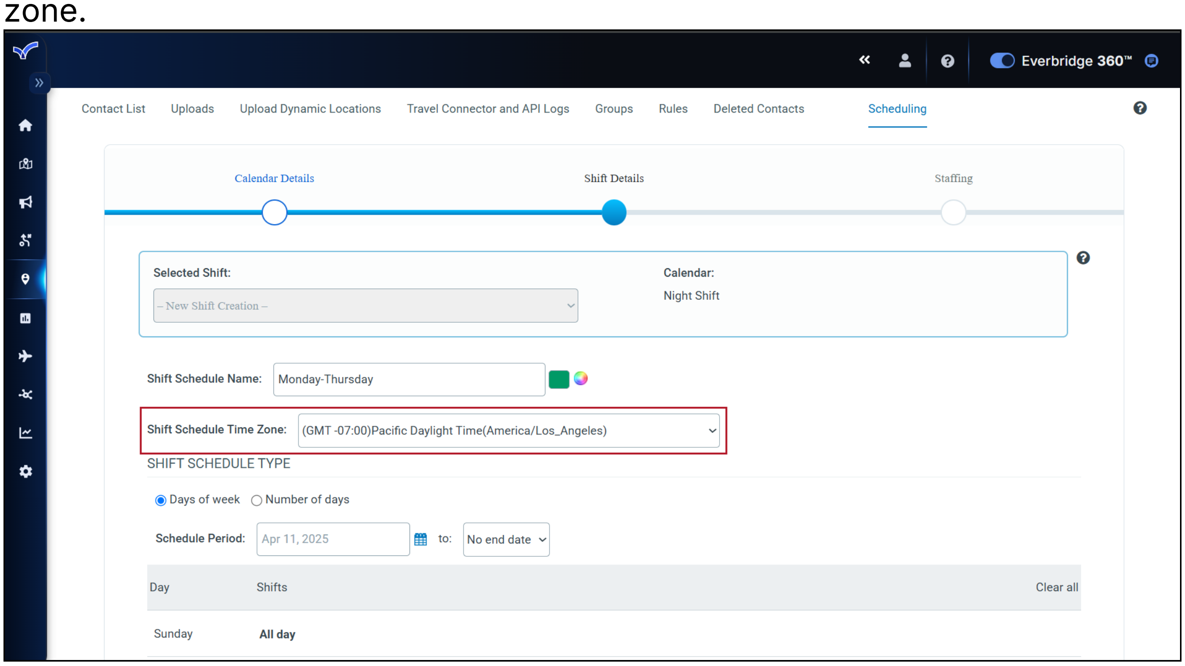
In the next step, you specify your shifts and shift schedules. A **shift** is a block of time. For example, 8:00 AM to 5:00 PM is a shift.

NOTE: Shifts have their own time zones, and time changes will follow the time zone of the shift.

A **shift schedule** includes the days. It could be a weekly shift from Sunday through Saturday, an 8-day shift, a night shift for the block of time, a weekend shift, or a split shift (where some staff members work a portion of the day and another set of staff members work the other part of the day).

To create a shift and shift schedule:

1. From the **Shift Details** section of the Scheduling wizard, enter a unique shift schedule name for this Calendar.
2. **Display color**: Click the round color icon to change the color of this shift. The shift is displayed in a specific color on the main scheduling page.
3. Select a time zone for the shift. The shift definition will show in that time zone.

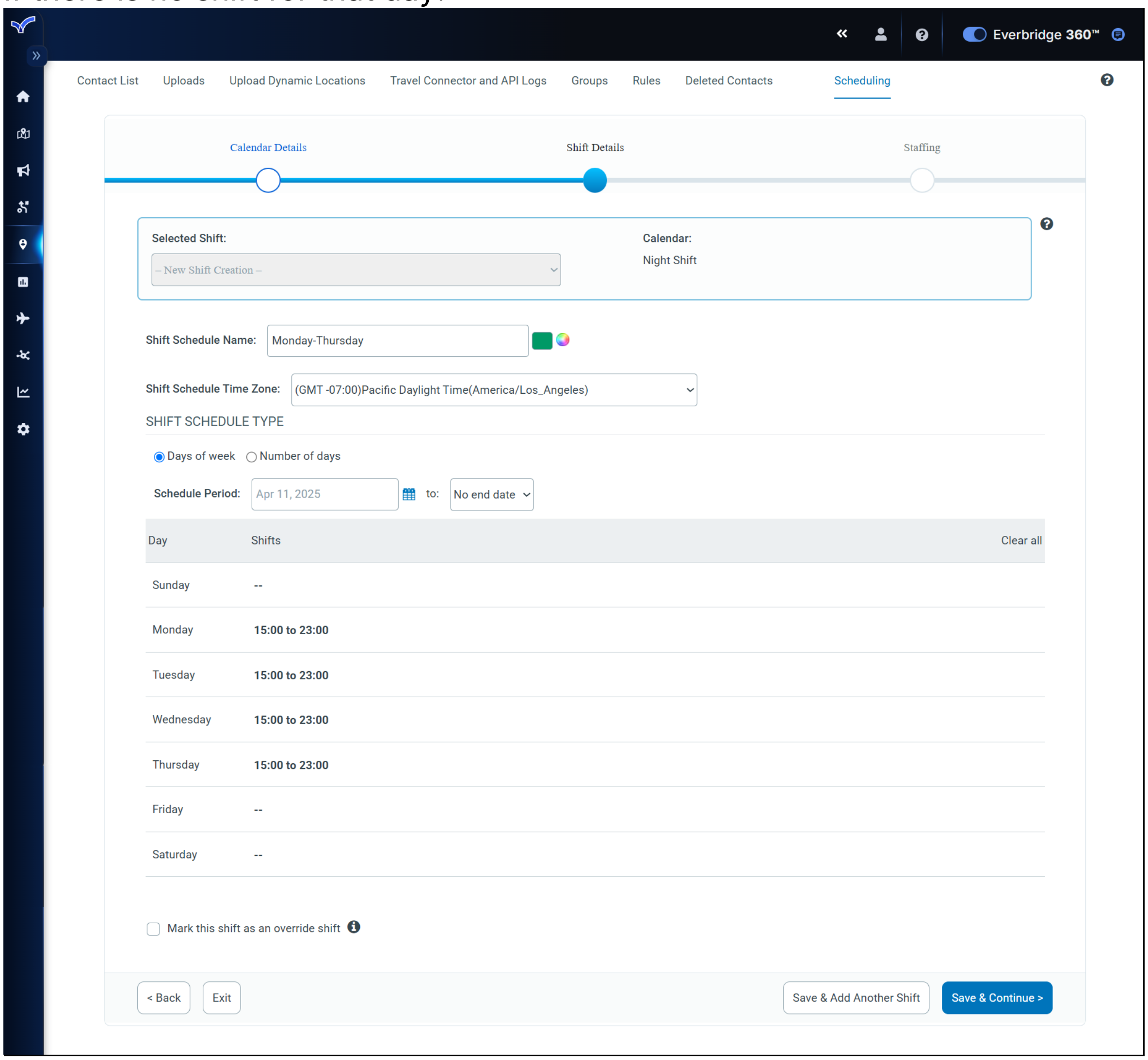


4. **Shift Schedule Type**: Specify how you want to set your shift schedule:

- **Day of the Week**: Each week (Sunday to Saturday), the shift has the same schedule.
- **Number of Days**: The same schedule repeats over the same number of days.

> **NOTE:** The maximum number of days that can be selected is 50.

5. Specify your **Schedule period** (start and end date for which the shift applies).
6. Specify the shift **start** and **end** date for each day. You can clear certain days if there is no shift for that day.



7. Optionally, you can set your shift as an override shift. An **Override shift** is a type of shift used to replace an existing shift for a specific period of time. This is used for example in the situation of overlapping holiday shifts.

Once you have specified your shift schedule, you can:

- **Go Back**: Navigate back to the Calendar details step.
- **Exit**: The shift is not created, all settings done on the page are lost. You are re-directed to the Scheduling home page
- **Save & Add another shift**: The shift is created but not staffed. You remain on the same page, but the page is reset to create a new shift.
- You can toggle from one shift to another by selecting the shift you want to edit using the **Selected Shift** drop-down menu.
- **Save & Continue**: The shift is created, and you are navigated to the next step to staff your shift.

Override Shift

An **override shift** is a specific shift within a Calendar that is flagged and can be used to override another shift schedule. An override shift is a normal shift, composed of layers and staff, and can be sequenced or not.

When an administrator sets up an override shift schedule, once a Notification occurs, the system uses the override shift schedule rather than the normal schedule for the time definition of the override shift.

For example, the user has a regular rotation schedule that has coverage on December 24, but as a company, there is a different holiday schedule that might or might not completely overlap with the regular schedule.

When creating or editing a shift, the manager can specify that the shift is an override shift. There is no limitation on the number of override shifts. Any shift can be an override shift.

The following rules apply during notification:

- If there are no override shifts, the Notification is sent to the on-call staff of the regular shift.
- If there are regular shifts and override shifts, the Notification is sent to the on-call staff on the override shifts.
- If there are multiple override shifts, the Notification is sent to the on-call staff of all the override shifts.
- If the Notification request is for a specific shift (as defined in a specific rule), the override shift does not interfere, and the Notification is sent to the on-call staff of the specific shift.
    - For example, I have a morning shift from 9 AM-5 PM, and at the same time, I have an override shift from 9 am-5 pm. When a Notification

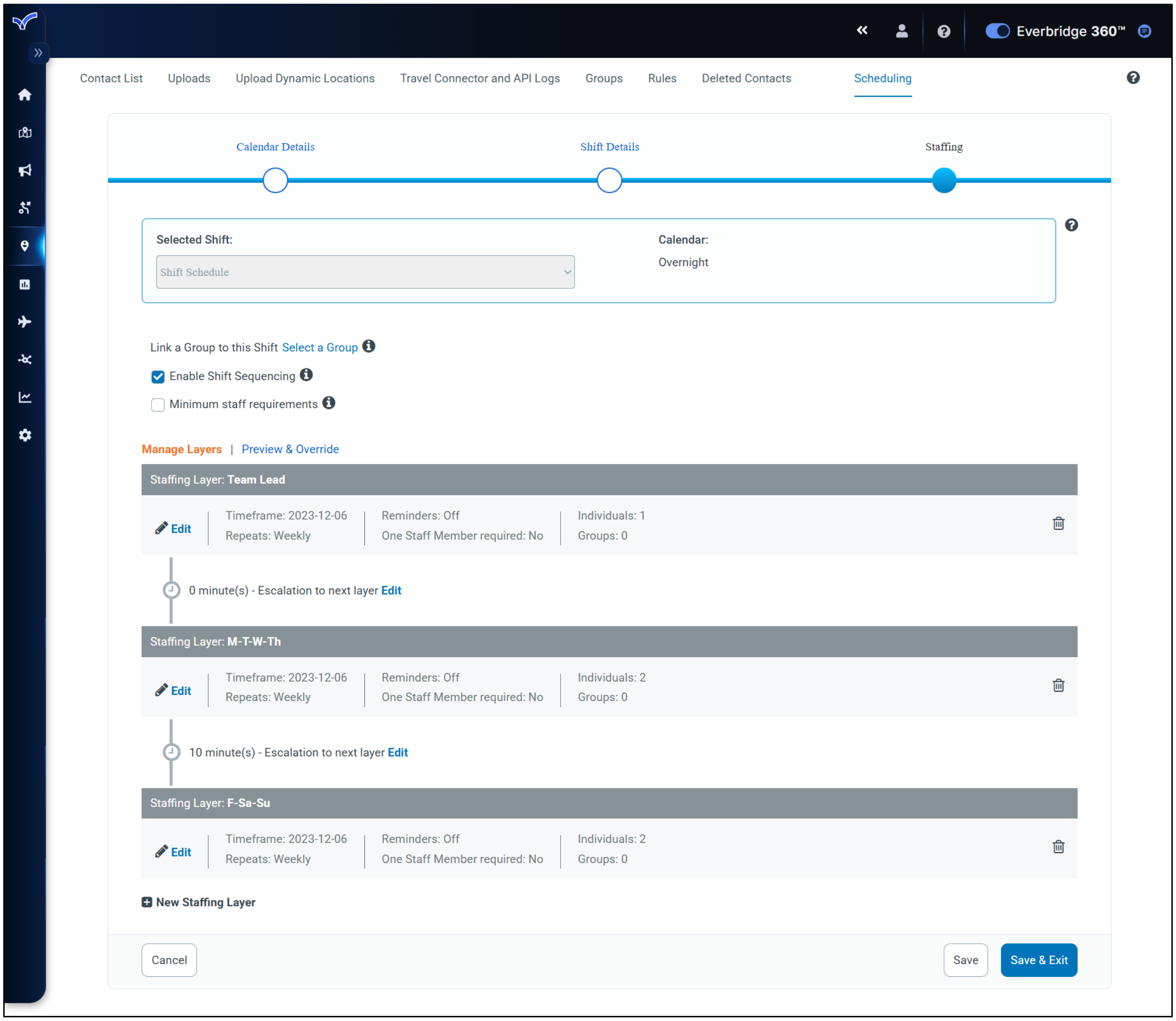
request is sent using a rule specifically targeting the morning shift, the Notification is sent to the on-call staff of the morning shift.

- If the Notification request is for all the shifts in a Calendar, then the override shift takes over and overrides the regular shifts.
- In both Member and Manager Portals, when a shift is displayed, an indicator is displayed if the shift is an override shift.

Staffing a Shift

When staffing a shift, staffing options for the shift as well as staffing layers must be specified.

A shift is composed of **staffing layers**. Layers are used to group your Staff by category and define the escalation process. Staff is added to the different layers.



When accessing the **Staffing** page, each layer to be defined is added in an expandable/collapsible form.

- Only one layer can be edited at a time.
- Changes made to a layer are saved by selecting **Save** on the page.

- When selecting the **Add New Layer** link and the layer was not explicitly saved, the user is prompted to confirm whether he or she wants to save the changes or not.
- The order of the layers on the page defines the escalation sequence between the layers.
- Layers can be re-ordered by dragging/dropping the forms.

From the shift drop-down, select the shift you want to staff. The shift that was selected in the previous step of the wizard is automatically selected.

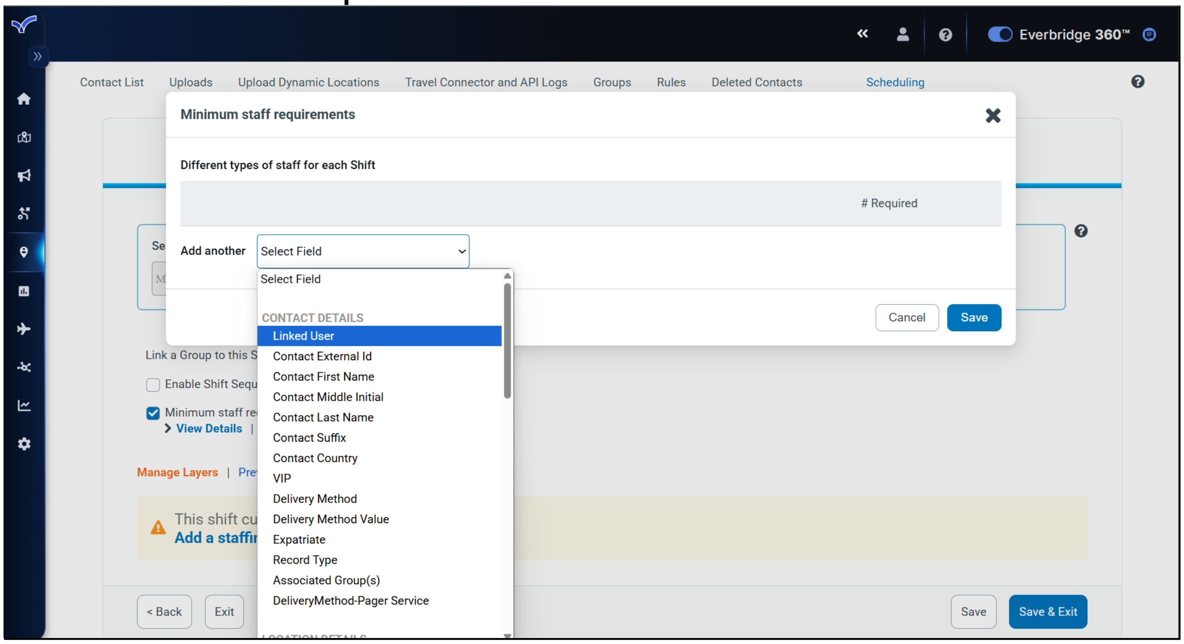
Shift Staffing Options

When you first access the Staffing tab for your shift, no layers exist in the shift. They'll need to be configured.

To configure your shift staffing options:

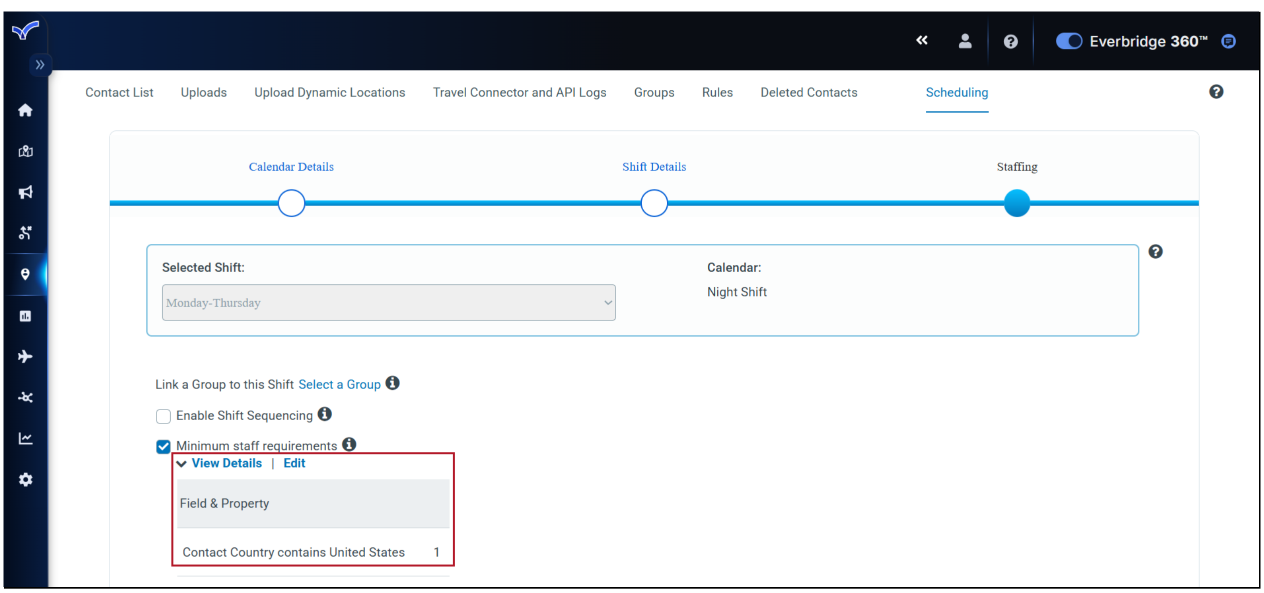
1. **Link a group to this shift**. Select specific groups when you want to restrict the selection of staff members in the layers to the contacts that belong to those groups.
   a. You can link multiple groups to a shift.
   b. Contacts staffed on the shift must belong to the groups.
   c. When adding or removing groups to/from the staffed shift, if any staffing layers or overrides violate the newly linked groups' rules (contacts staffed on the shift must belong to the groups), the layers and/or overrides will be deleted after user confirmation.
      - Unlinking all the groups or linking additional groups to the shift will not impact the current staffing of the shift and staffing will be kept.
2. **Enable Shift Sequencing**. A shift can be sequenced or not sequenced.
   a. If a shift is sequenced, when an Incident is launched, staff members will be notified in the order of the sequence.
   b. If a shift is not sequenced, when an Incident is launched, all staff members across all layers will be notified at the same time. Sequencing options in the layers will not be available.

3. **Set Minimum Staff Requirements.**



   a. When adding contacts to the shift staffing layers, you can define the minimum number of staff members in your shift that matches certain criteria.
   b. The staff members' criteria are defined based on the fields that are predefined for the contacts.
   c. Select a field, select the matching criteria, and specify the number of required staff members that must match the criteria.

If the minimum staffing criteria are not met, a warning is displayed in the Calendar View. You can view the minimum Staff requirements by selecting **View Details**.



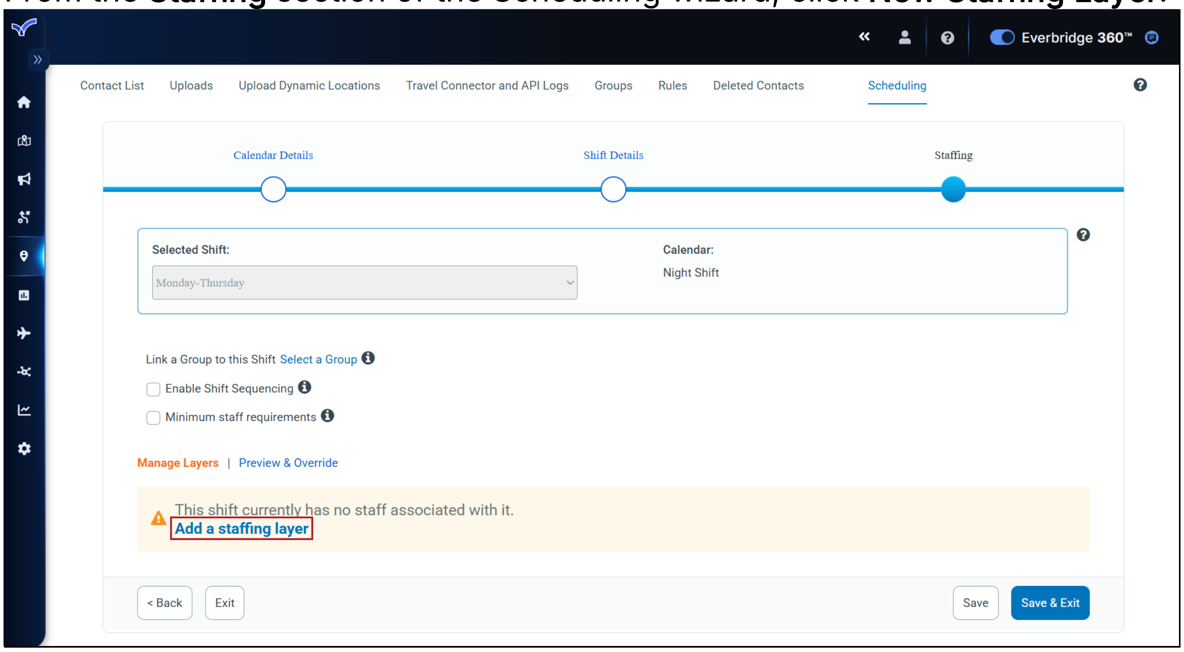
Defining Layers

The staffing is done by using layers, which include the on-call contacts who are notified when an Incident is launched and is targeting a Calendar. The Notification engine sends the Notification to the first layer, then to the next layer.

Although there is no limitation on the number of layers a shift can contain, there must be at least one layer.

To add a staffing layer to create the first layer:

1. From the **Staffing** section of the Scheduling wizard, click **New Staffing Layer**.



   When creating a layer, you must specify a name. Several layers can have the same name as long as their schedules do not override.

2. Specify any of the following options:
   - **This layer must have at least one staff member**: Any operation that results in not having one on-call contact fails (creating an unavailability without replacement, not staffing the layer for a specific day). If this option is selected, you cannot save the layer unless there is one staff member added to the layer.Send an email reminder before a scheduled shift: Whether or not an email reminder is sent to the on-call staff prior to the start of their shift. This option is grayed out if the on-call reminder is not turned on for the Calendar.
   - **Start and end date:** Define the time boundaries of the layer.
   - **Repeat:** Whether you want to repeat the staff settings. You can repeat weekly with a specific week interval and specify the day for which the layer will be staffed.

- **Different staff on different days:** You have the option to specify different staff per day. Select the days for which you want the layer to be staffed, then for each day select the staff to add to the layer.

  > **NOTE:** When you choose this option, you cannot use the **Rotation** settings.

3. **Define sequencing options** (only when Advanced Escalation and Scheduling is turned on).

   When a shift is sequenced you can specify the sequencing options for the layer. There are three options:

   - **Use the Notification escalation settings**: Staff in the layer are notified following the sequencing wait time defined in the Incident/Notification template.
   - **Use custom escalation time**: Escalation wait times defined in the Notification are ignored, and staff in the layer are notified following the custom time defined in the layer.
   - **None - Send to all at once**: Escalation wait time defined in the Notification is ignored, all staff in the layer are notified at the same time. As a result, the layer is not sequenced.

     In a specific shift, you can have a mix of layers with different sequencing options. The sequencing wait time defined in the template only drives the escalation time for layers with sequencing options set to **Use the Notification escalation settings**.

     > **NOTE:** No deduplication occurs between the layers. If a contact is staffed in more than one layer, he or she is notified multiple times.

   If **Simple Escalation and Scheduling** is used, the layer always uses the Notification escalation settings for a sequenced shift. There is no ability to set any other option.

4. **Add staff to the layer.**

   You can add multiple individuals or groups to a layer:

   - **Individuals**:
     - Can be added if the shift is sequenced or not.
     - If the shift is linked to a group, the selection of individuals is restricted to the member of the group.
     - You can use advanced search to search for individuals based on specific criteria.

- **Groups**:
    - Can only be selected if there is no minimum staff requirement set for the shift.
    - In **Simple Escalation and Scheduling** mode, groups can only be staffed if the shift is not sequenced.
    - In **Advanced Escalation and Scheduling** mode, groups can be staffed to both sequenced and non-sequenced shifts. However, when a group is staffed on the layer for a sequenced shift, the sequencing options are automatically set to **None - Send to all at once**. You cannot change the sequencing options until the last group is removed from the layer.

    > **NOTE:** In order for a Calendar to not be shared amongst all users in a particular role, create a separate role for each group of users with who you want to share the Calendar, and only select that group as staff to that Calendar.

5. **Define sequence** (Sequenced shift only).
    - Drag and drop the contacts in the right-hand panel in the order in which you want the contacts to be notified.
6. **Define Rotation** (Sequenced shift only).
    - Rotation can only be defined if the staff is the same for all days.
7. Once the layer definition is completed, you can opt to:
    - **Save**: The layer is created (if not created yet) and changes are saved, and the user remains on the staffing page.
    - **Save and exit:** The layer is created (if not created yet) and changes are saved, and the user is returned to the Scheduling home page.
    - **Add New Layer:** If the current layer was not saved, the user is prompted to save, it collapses the existing layer form, and creates a new form for the next layer. The new layer is created in the selected shift.
8. To staff a different shift, select the shift name in the drop-down on the top of the staffing page and create or edit layers.

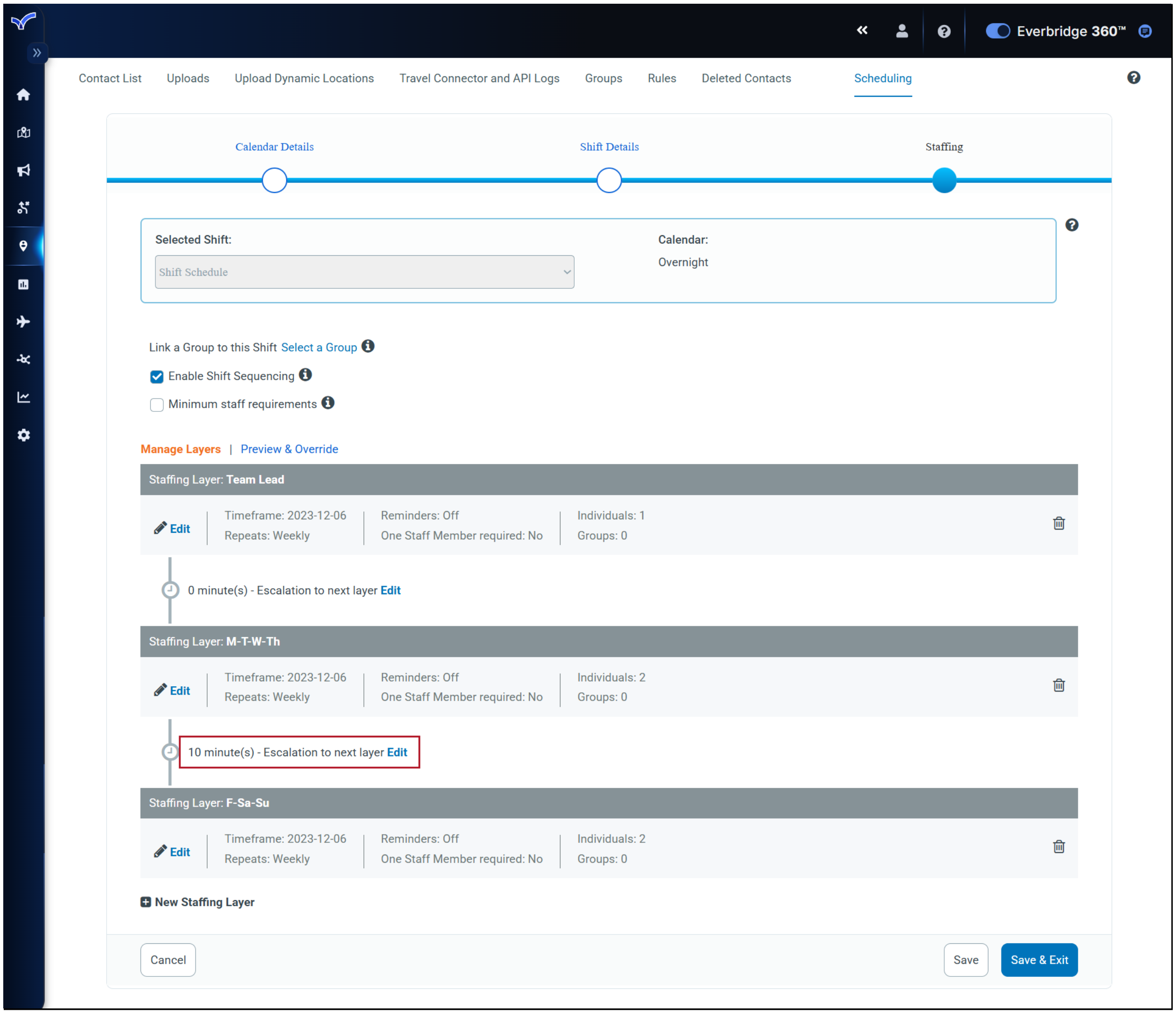
Order Your Layers

You can define the order of your layers in the sequence by dragging and dropping the layers in the order of the sequence.

For a sequenced shift, the layers will be targeted in the order of sequence in which they are displayed on the page.

Define Escalation to Next Layer (Advanced Scheduling only)

When the Advanced Scheduling is turned on in **Settings** > **Contacts and Groups** > **Scheduling**, the shift is sequenced and if there is more than one layer, you can define an escalation time to the next layer.



The escalation time specified starts at the start of the layer, when the first staff is notified, to the start of the next layer, and triggers the Notification to the first staff of the next layer.

By default, when creating a layer or when editing a layer that was created using the Simple Escalation and Scheduling option, the escalation to the next layer time presented in the user interface is the one that is currently set in the Advanced

Escalation and Scheduling option at the Organization level. You can edit it and change the default value.

The escalation time set to the next layer is not overridden by the **Sequencing Wait Time** specified in the Incident/Notification. In the case of an override shift, escalation between the layers are always one of the targeted shifts (regular or override).

In the example below, a shift includes three layers, and escalation to the next layer is set to:

- 5 minutes for layer "Resolvers"
- 10 minutes for layer "Escalation 1"

A Notification was sent with a sequencing wait time of 3 minutes.

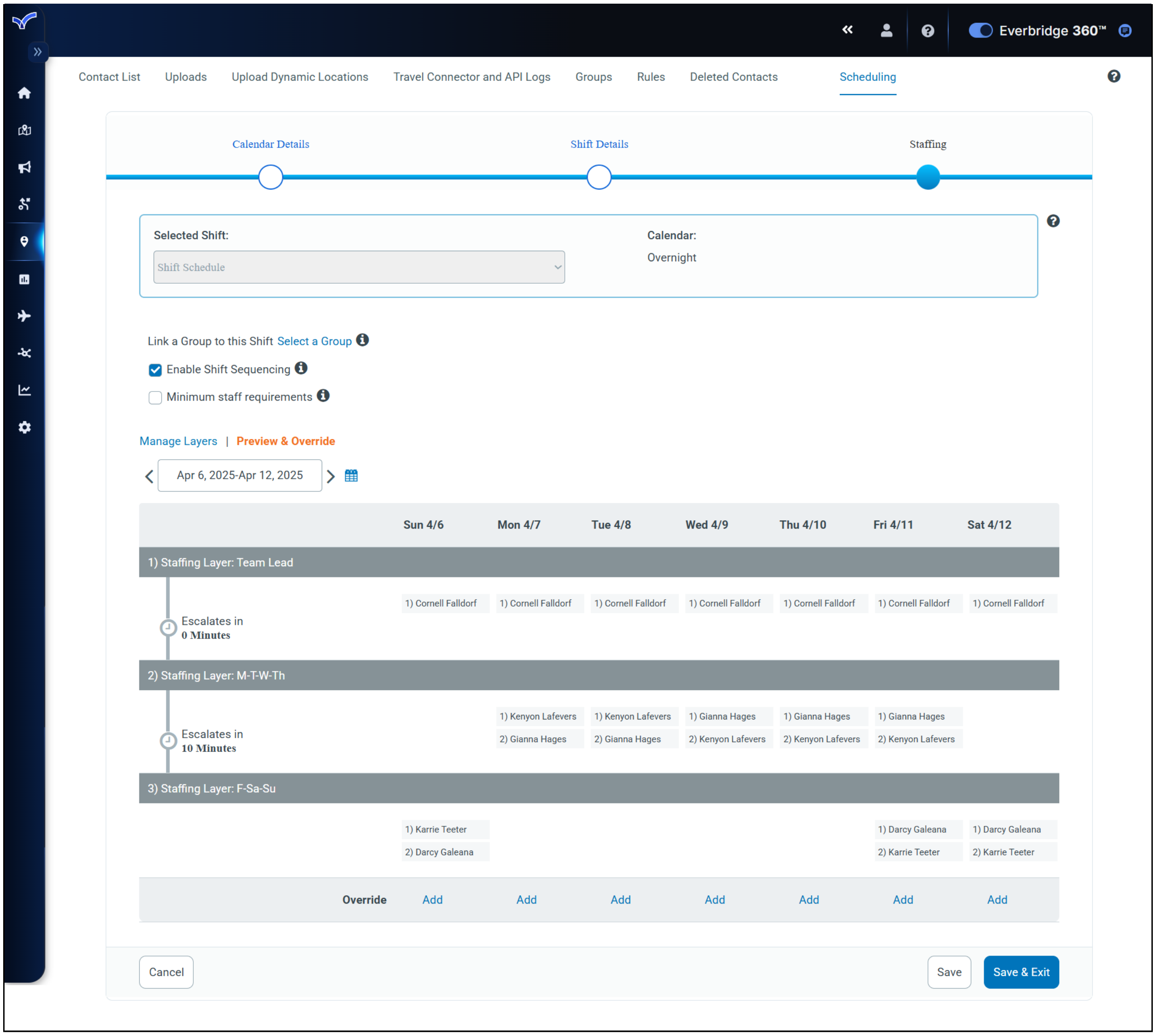
As a result:

- Staff 1 are notified first at 0 minutes, the clock for escalation to the Escalation 1 layer is starting.
- Staff 2 are notified after 3 minutes.
- Mgr 1 is notified after 5 minutes, the clock for escalation to Escalation 2 layer is starting.
- Staff 3 are notified after 6 minutes.
- Mgr 2 is notified after 8 minutes.
- Executive 1 is notified after 15 minutes.

Preview Schedule

As you are building your schedule and staffing your layers, you can preview your staffing by selecting **Preview & Override**.

In **Preview Mode**, you can see the staffing for a specific time frame of all the layers within your shifts. If working in the **Advanced Escalation and Scheduling** mode, the escalation time to the next layer is displayed.

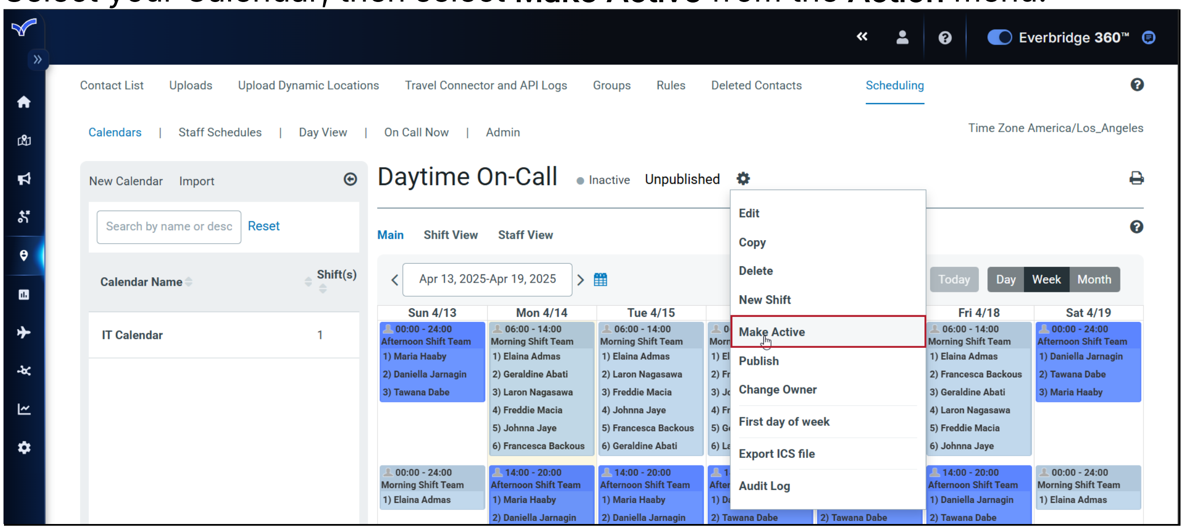

Everbridge 360™
Contact List
Uploads
Upload Dynamic Locations
Travel Connector and API Logs
Groups
Rules
Deleted Contacts
Scheduling
Calendar Details
Shift Details
Staffing
Selected Shift:
Shift Schedule
Calendar:
Overnight
Link a Group to this Shift Select a Group
Enable Shift Sequencing
Minimum staff requirements
Manage Layers | Preview & Override
Apr 6, 2025-Apr 12, 2025
Sun 4/6
Mon 4/7
Tue 4/8
Wed 4/9
Thu 4/10
Fri 4/11
Sat 4/12
1) Staffing Layer: Team Lead
1) Cornell Falldorf
Escalates in
0 Minutes
2) Staffing Layer: M-T-W-Th
1) Kenyon Lafevers
2) Gianna Hages
1) Gianna Hages
2) Kenyon Lafevers
Escalates in
10 Minutes
3) Staffing Layer: F-Sa-Su
1) Karrie Teeter
2) Darcy Galeana
1) Darcy Galeana
2) Karrie Teeter
Override
Add
Cancel
Save
Save & Exit

Calendar Activation

Until the Calendar is activated, no Notification will be sent to on-call staff.

To activate the Calendar:

1. Navigate to **Contacts > Scheduling > Calendar View**.
2. Select your Calendar, then select **Make Active** from the **Action** menu.



While active, if the respective options have been turned on:

- Individuals or on-call staff are notified when the Calendar is changed.
- On-call reminders are sent to on-call staff before the start of the shift.

Make a Calendar Inactive

When making a Calendar inactive, all Notifications stop for on-call staff. While inactive, if you have set up the option to notify individuals or on-call staff upon Calendar Notification, no Notification is sent if the Calendar is modified. On-call reminders are not sent while the Calendar is inactive.

To make a Calendar inactive:

1. Navigate to **Contacts > Scheduling > Calendar View**.
2. Select your Calendar then select **Make Inactive** from the **Action** menu.

Publishing a Calendar

You can share your Calendars to your Member Portal where you can view Published Calendars and/or your Personal Schedule.

To publish a Calendar:

1. Navigate to **Contacts > Scheduling > Calendar View**.
2. Select your Calendar, then select **Publish** from the **Action** menu.

Only active Calendars can be published to the Member Portal. If the Calendar is not yet active, it is activated at the same time.

> **NOTE:** The views to display a published Calendar on the Member Portal can be set by the administrator under **Settings > Member Portal > Publish Calendar**.

Escalation and Deduplication

Escalation and deduplication rules depend on whether the **Simple** or **Advanced Escalation and Scheduling** are chosen, as well as sequencing options defined in the targeted shifts, layers, and Notifications.

In all cases, escalation stops when the response quota is reached. Response quota is defined in the template **Sending Options** > **Sequencing**.

Simple Escalation and Scheduling

Deduplication

When using the Simple Escalation and Scheduling option, deduplication will always occur, meaning that the system will eliminate duplicate copies of repeating data. When contacts are targeted more than once as part of a Notification, they will only be notified once.

Deduplication occurs in the following order:

- Individual Contact
- Group
- Rules (including those targeting a Calendar).

If a contact is targeted as part of a group and a rule targeting a Calendar, the contact is deduplicated and will not receive an escalation Notification.

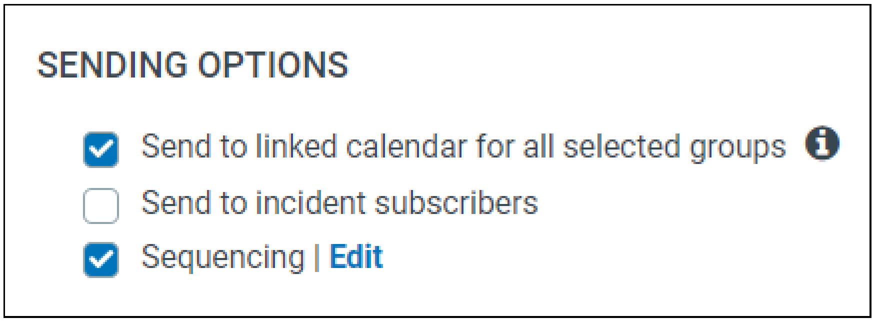
Escalation when targeting a schedule

Escalation occurs for on-call staff ONLY if the Notification is sequenced AND the targeted on-call staff belongs to a sequenced shift.

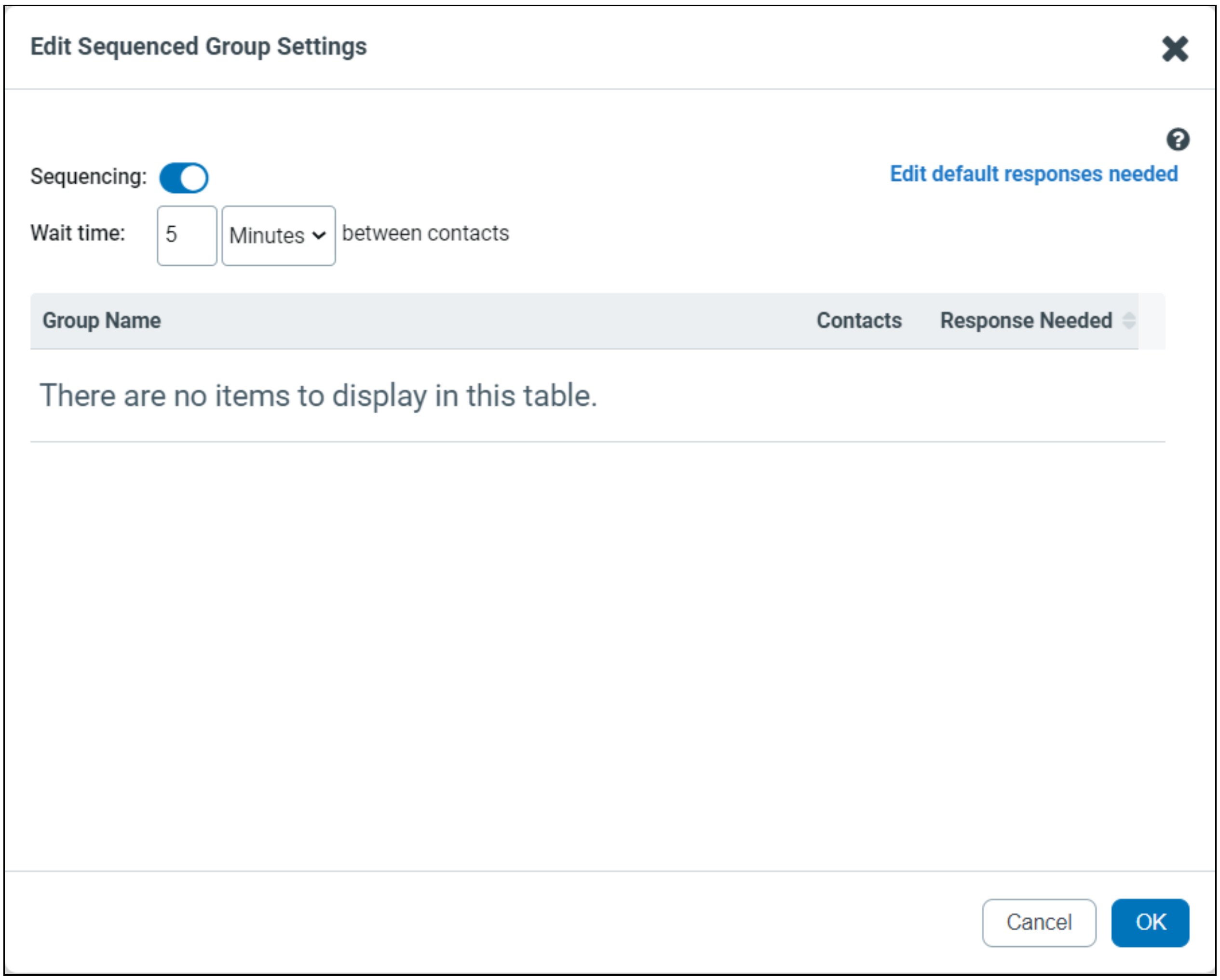
Shift	Notification	Result
Not Sequenced	Not Sequenced	All on-call contacts are notified at the same time.
Not Sequenced	Sequenced	All on-call contacts are notified at the same time.
Sequenced	Not Sequenced	All on-call contacts are notified at the same time
Sequenced	Sequenced	On-call contact are notified in the order of the sequence defined in the shift.

Sequencing a Notification or Incident

Escalation time when targeting a Calendar is set in the Notification or Incident template by selecting the Sequencing checkbox and clicking **Edit** in the template **Contacts > Sending Options**.



The escalation time between each contact in any targeted shifts is the **Wait Time** specified when editing the sequencing.

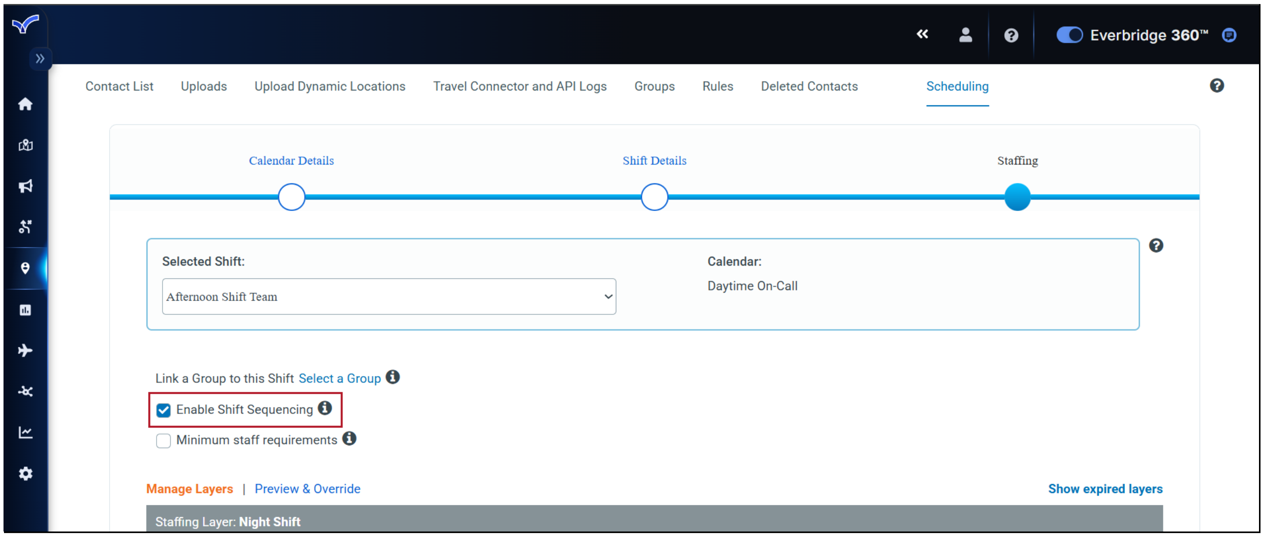


By default, the wait time is 5 minutes between contacts and can be adjusted to any number between 1 and 1440 minutes or a maximum of 24 hours.

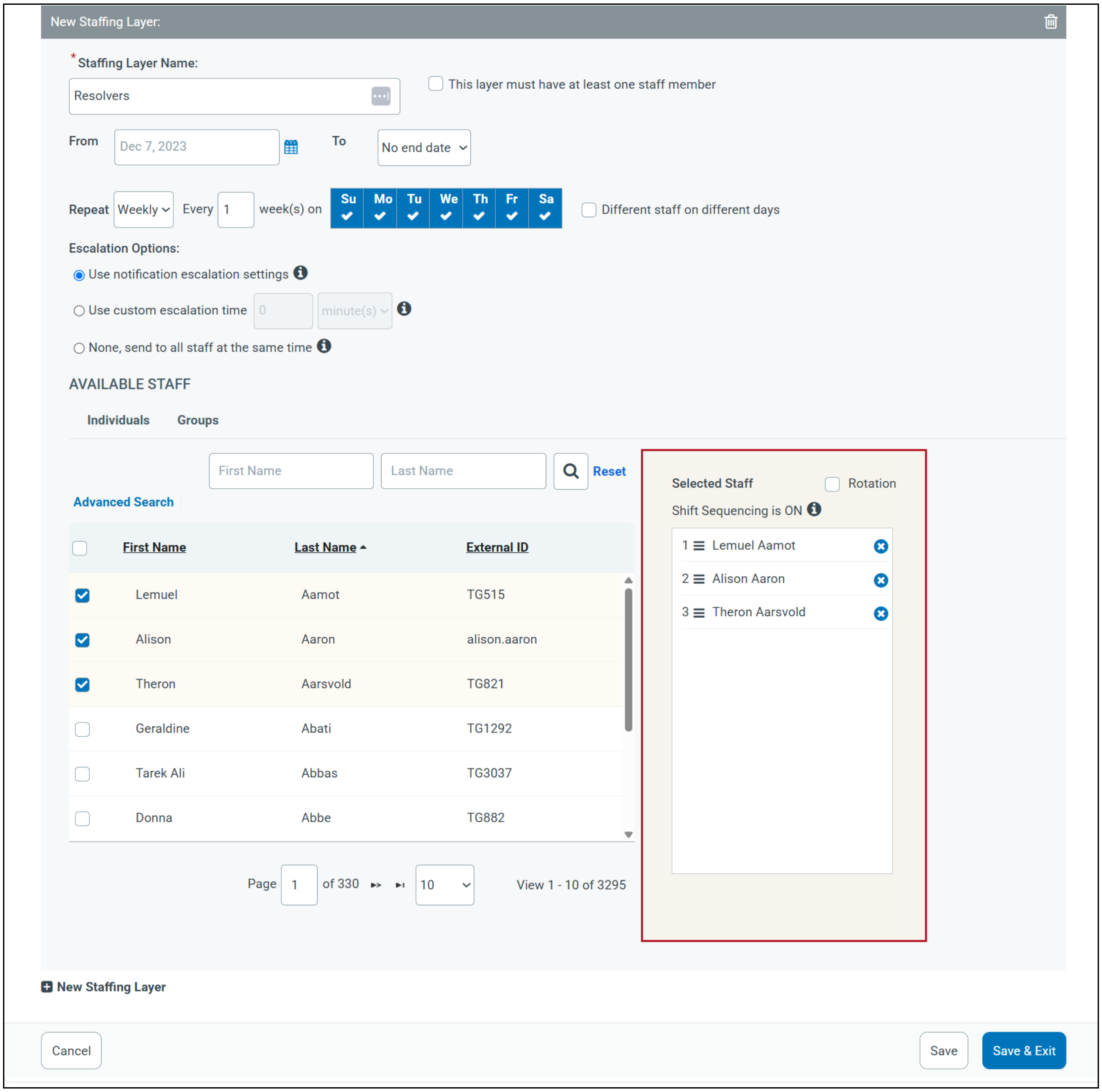
If there are multiple layers in the targeted shift, escalation from the last contact of a layer to the first contact of the next layer follows the escalation wait time defined in the template.

Sequencing a Shift

When creating or editing your shift, select the **Staffing** tab, then select the **Enable Shift Sequencing** checkbox.



Then in your layer, define the sequence in which your staff will be notified by dragging and dropping the staff in the list.


New Staffing Layer:
Staffing Layer Name:
Resolvers
This layer must have at least one staff member
From
Dec 7, 2023
To
No end date
Repeat
Weekly
Every
1
week(s) on
Su Mo Tu We Th Fr Sa
Different staff on different days
Escalation Options:
Use notification escalation settings
Use custom escalation time
0
minute(s)
None, send to all staff at the same time
AVAILABLE STAFF
Individuals
Groups
First Name
Last Name
Reset
Advanced Search
First Name
Last Name
External ID
Lemuel Aamot TG515
Alison Aaron alison.aaron
Theron Aarsvold TG821
Geraldine Abati TG1292
Tarek Ali Abbas TG3037
Donna Abbe TG882
Page 1 of 330
10
View 1 - 10 of 3295
Selected Staff
Rotation
Shift Sequencing is ON
1 Lemuel Aamot
2 Alison Aaron
3 Theron Aarsvold
New Staffing Layer
Cancel
Save
Save & Exit

Advanced Escalation and Scheduling

Deduplication

Non-sequenced Notification

When using non-sequenced Notifications, deduplication always occurs.

Sequenced Notification

In the case of a sequenced Notification, when using Advanced behavior, two pools of contacts are considered for deduplication:

- **Pool 1** - Contacts targeted as part of a group, individual contacts, or rules (with the exception of Calendars targeting sequenced shifts)
- **Pool 2** - Contacts targeted as part of a sequenced shift

Each pool of contacts has its own deduplication rules; there is no deduplication occurring between the two pools of contacts.

Pool 1: deduplication always occurs in the pool of contacts targeted as part of a group, individual contacts, or rules. When a contact is targeted more than once as part of a Notification, the contact is only notified once. deduplication occurs in the following order: Individual Contact - Group - Rules.

> **NOTE:** Contacts targeted as part of non-sequenced shifts are deduplicated along with contacts targeted as Individual Contacts, Groups, and other rules.

Pool 2:

For contacts targeted as part of a sequenced shift:

- There is no deduplication occurring if a contact is staffed in two different shifts.
- For sequenced shifts: There is no deduplication occurring if a contact is staffed in two different layers of the same shift.
- Deduplication always occurs if a contact is staffed more than once in the same layer.

As a result, if a contact is targeted as part of a group and a rule targeting a Calendar, the contact is not deduplicated and receives an escalation Notification.

Escalation When Targeting a Schedule

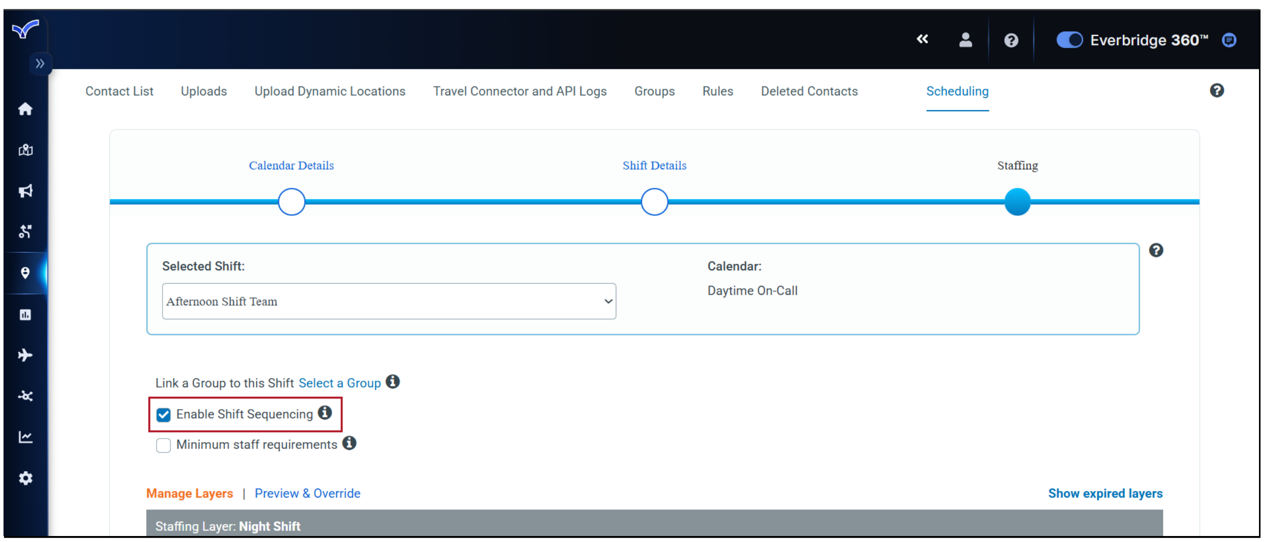
When the Advanced Escalation and Scheduling option is selected, each specific layer contains the following information:

- Escalation between contacts in a layer
- Is escalation time between contacts taken from the Notification template
- Escalation to the next layer

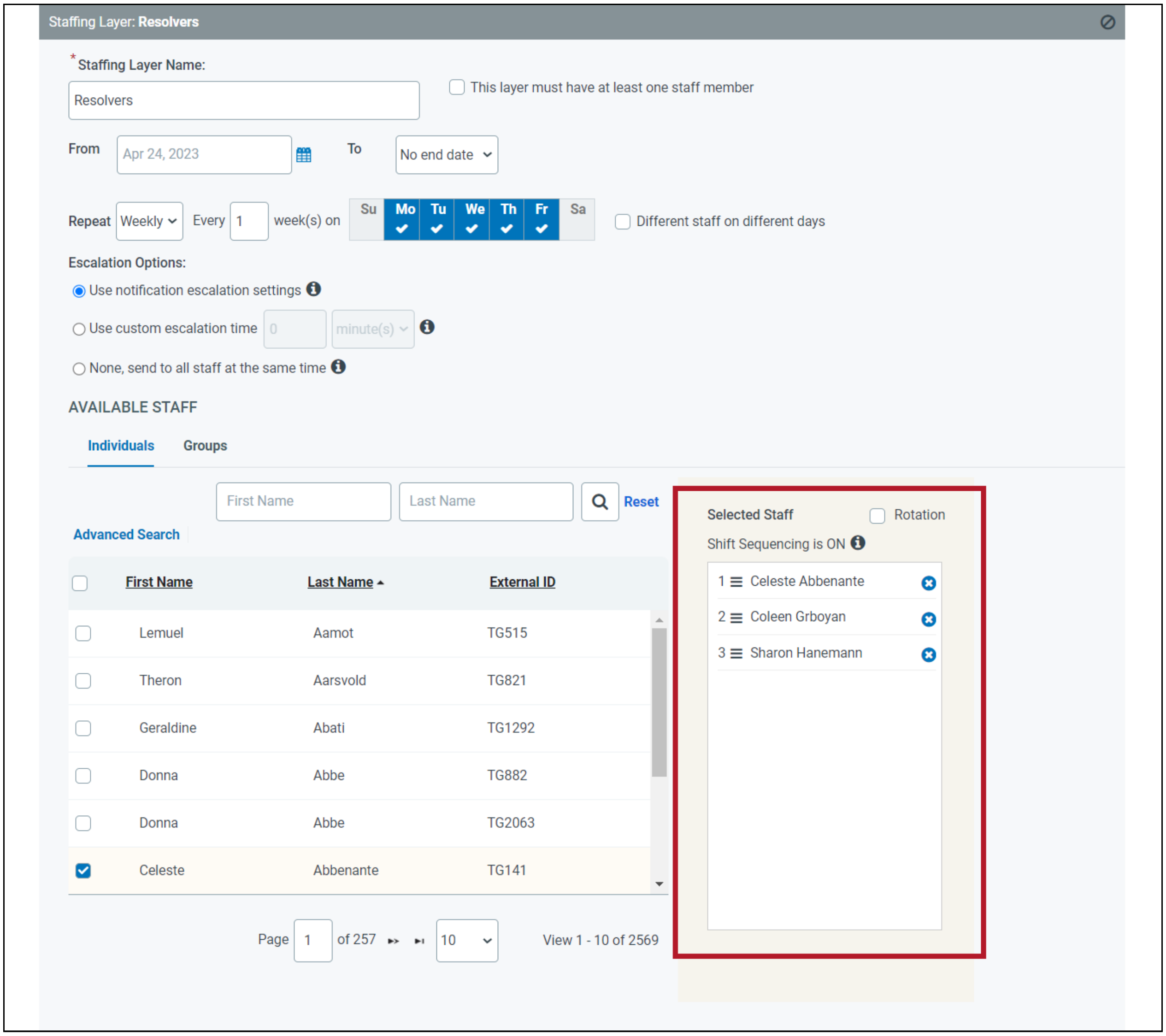
The **Scheduling** user interface only allows changing the escalation time to the next layer and whether the escalation between contacts taken from the Notification template. By default, the escalation between contact in a layer is 0 (zero); if it is not taken from the Notification template, all contacts are notified at the same time.

Sequencing a shift

When creating or editing your shift, select the **Staffing** tab and select the **Enable Shift Sequencing** checkbox.



Then in your layer, define the sequence in which your staff is notified by dragging and dropping the staff in the list.

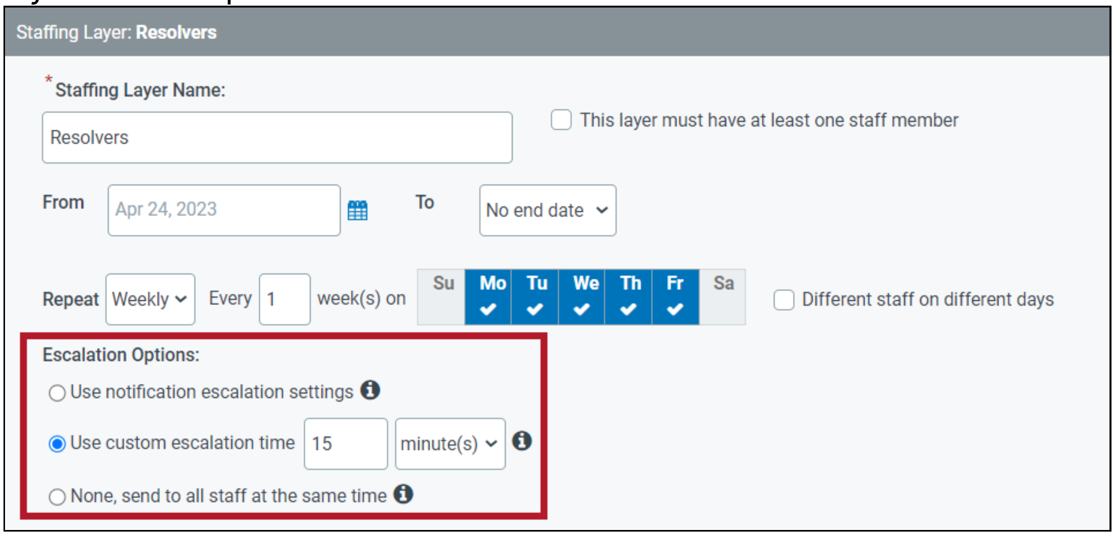


Sequencing Options in a Layer

When a shift is sequenced, you can specify the sequencing options for the layer. There are three options:

- **Use the Notification escalation settings**: Staff in the layer are notified following the sequencing wait time defined in the Incident/Notification template.
- **Use custom escalation time:** Escalation wait time defined in the Notification is ignored, staff in the layer are notified following the custom time defined in the layer.
- **None - send to all at once**: Escalation wait time defined in the Notification is ignored; all staff in the layer are notified at the same time. As a result, the

layer is not sequenced.



In a specific shift, you can have a mix of layers with different sequencing options. The sequencing wait time defined in the template only drives the escalation time for layers with sequencing options set to **Use the Notification escalation settings**.

> **NOTE:** If multiple layers are defined as **None - send all at once**, no deduplication occurs between the layers, if contacts are staffed in more than one layer, they are notified multiple times.

Escalation to the Next Layer

When the Advanced Escalation and Scheduling is turned on at the Organization level, a shift is sequenced and if there is more than one layer, you can define an escalation time to the next layer.

The escalation time specified starts at the start of the layer, when the layer is initialized and the first staff is notified, to the start of the next layer and triggers the initialization of the layer and Notification to the first staff of the next layer.

By default, when it is not set, a Notification targeting a schedule is sent, the time used to escalate to the next layer is the one that is set in the Advanced Escalation and Scheduling option at the Organization level.

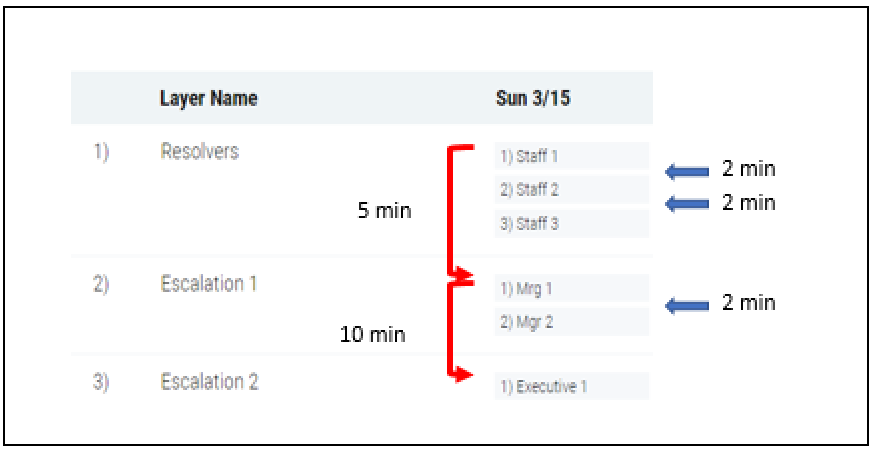
When creating a layer or when editing a layer that was created prior to the 20.0 release, for which there was not escalation time to the next layer set, the time presented in the user interface is the one that is currently set in the Advanced Escalation and Scheduling option at the Organization level.

You can set it to any value. As soon as the layer is saved, the value displayed in the user interface is persisted and is used moving forward.

- The escalation time set to the next layer is never overridden by Sequencing Wait time specified in the Incident/Notification.
- In the case of an override shift, escalation between the layers is always one of the targeted shifts (regular or override).
- As the escalation between staff within a layer is specific to the Notification the escalation to the next layer specific to the layer and the clock starts when the first staff is notified in this layer, it is possible that staff on the second layer could be notified before the last staff on the first layer is notified.

Example 1:

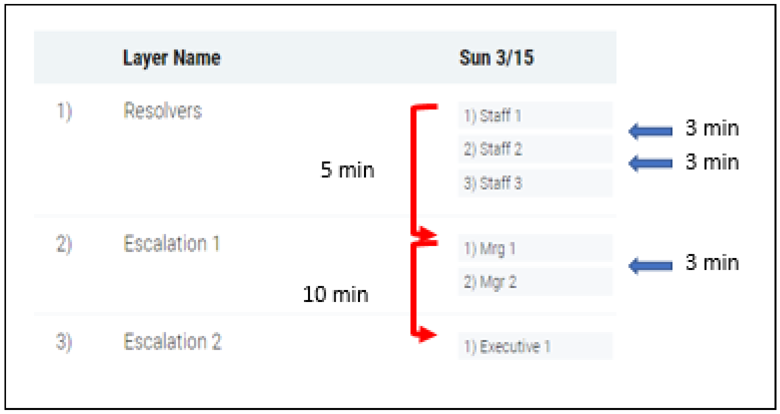
Shift with three layers, escalation to next layer set to 5 minutes for "resolvers" layer and 10 minutes for "Escalation 1" layer, a Notification sent with a wait time of 2 minutes.



- At t = 0 - Staff 1 is notified, the clock starts for the escalation to layer "Escalation 1"
- At t= 2 min - Staff 2 is notified
- At t = 4 min - Staff 3 is notified
- At t = 5 min - Mgr 1 is notified (escalation to next layer set in layer "Resolver" is reached, clock is starting for the escalation to layer "escalation 2")
- At t = 7 min - Mgr 2 is notified
- At t = 15 min - Executive 1 is notified (escalation to next layer set in layer "Escalation 1" is reached)

Example 2:

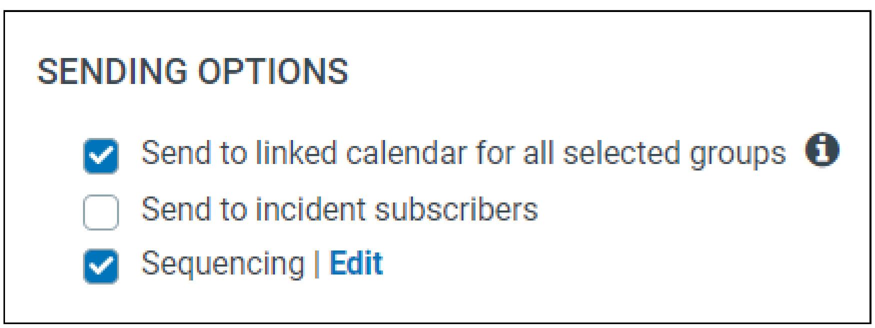
Shift with three layers, escalation to the next layer set to 5 minutes for "resolvers" layer and 10 minutes for "Escalation 1" layer, a Notification sent with a wait time of 3 minutes.

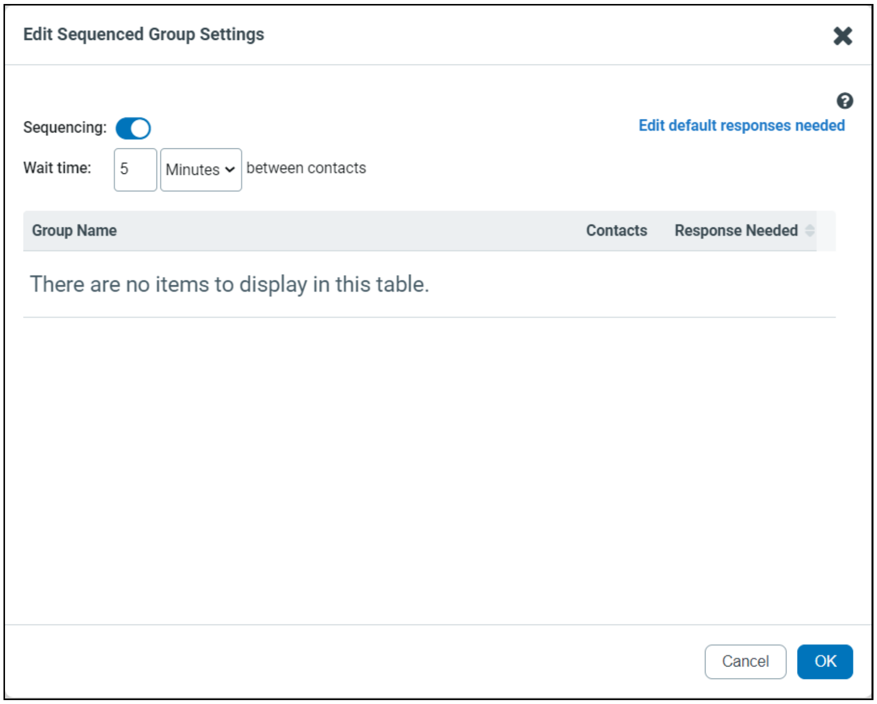


- At t = 0 - Staff 1 is notified, the clock starts for the escalation to layer "Escalation 1"
- At t= 3 min - Staff 2 is notified
- At t = 5 min - Mgr 1 is notified (escalation to next layer set in layer "Resolver" is reached, clock is starting for the escalation to layer "escalation 2")
- At t = 6 min - Staff 3 is notified
- At t = 8 min - Mgr 2 is notified
- At t = 15 min - Executive 1 is notified (escalation to next layer set in layer "Escalation 1" is reached)

Sequencing a Notification or Incident

Escalation time when targeting contacts in a sequenced shift is set in the Notification or Incident template by selecting the Sequencing check box and clicking **Edit** in the template **Contacts > Sending Options**.





The escalation time specified drives ONLY the escalation time between contacts within a layer.

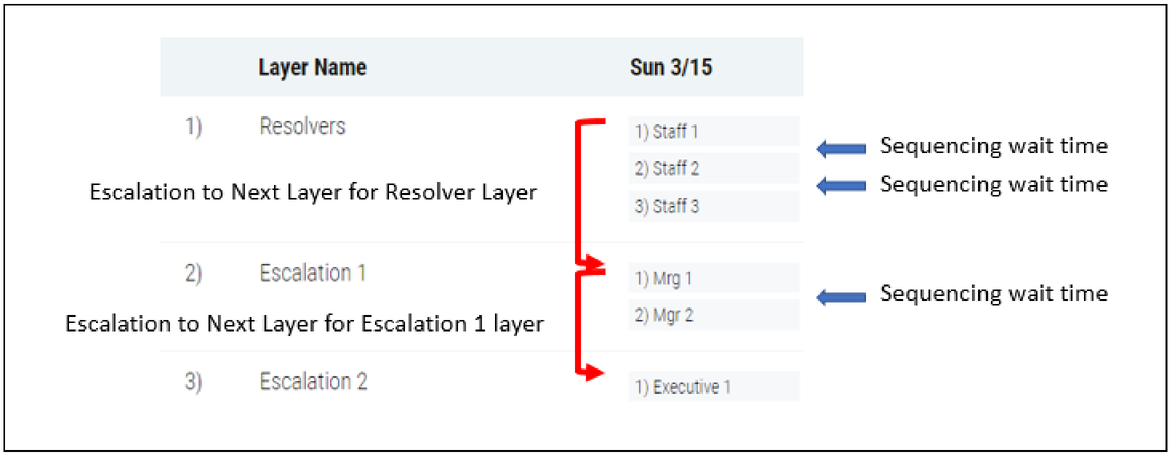
At the time of the Notification, it sets the Escalation between staff for all layers where the sequencing option was set to **Use Notification escalation settings**.

If there are multiple layers in the targeted shift for which the sequencing option was set to **Use Notification escalation settings**, the escalation time between the contacts within each of those layers will be the same.

For the layers where the sequencing option was set to **None, send to all staff at the same time**, the default of 0 (zero) is used and all contacts in those layers are notified at the same time.

By default, the sequencing wait time defined in the template is 5 minutes and can be adjusted to any number between 1 and 1440 minutes or a maximum of 24 hours.

NOTE: The escalation to the next layer is not driven by the sequencing wait time; it is specific to the layer and defined in the layer itself.



NOTE: The escalation wait time defined in the template does not drive the escalation from Staff3 to Mgr1.

Escalation and Response Notification

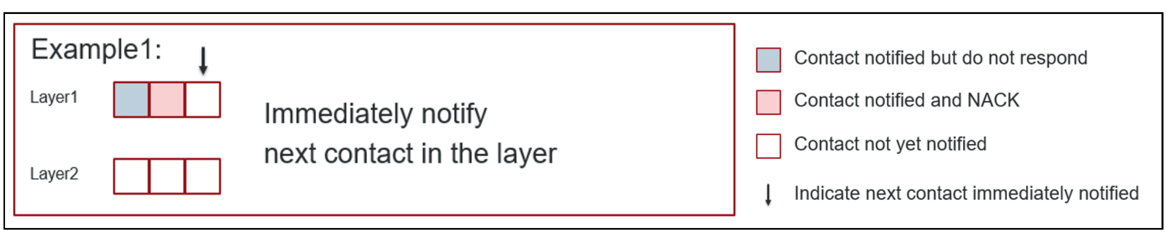
Response quota is met

Escalation stops when the response quota is reached. Response quota is defined in the template Sending options > Sequencing.

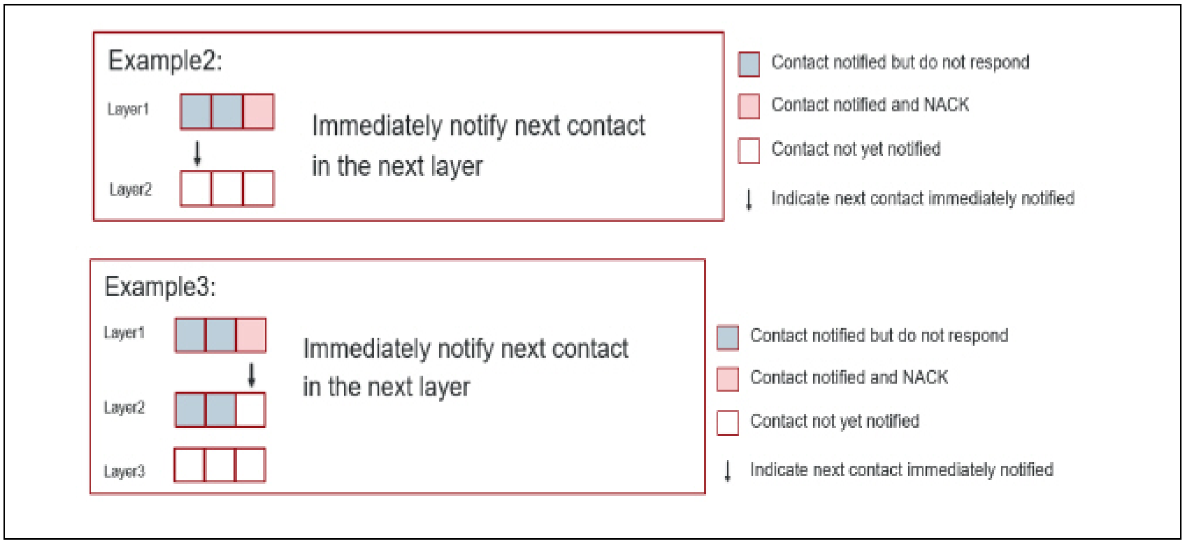
Negative Acknowledgment (NACK)

When polling and the desired response are set in the template, the non-desired response is considered a Negative Acknowledgment and at that time a Negative Acknowledgment is sent (NACK) by the contact.

- When a NACK is returned and the confirmation quota is not met, the Notification is immediately escalated to the next staff member in the layer with no wait time.



- When a NACK is returned by the last staff member of a specific layer, the Notification is immediately be escalated to the next layer (next contact in the next layer) if the escalation time to the next layer has not yet been reached.



- When a contact sends a NACK and the next contact is immediately notified, the escalation to the next contact is at NACK time + Escalation time between staff for the layer.
    - Ex: escalation time = 2 min
    - Contact1 sent a NACK at 1 minute, Contact2 is immediately notified, escalation goes to contact3 2 minutes later at 3 minutes (NACK time + escalation time)

Duplicate/Invalid Delivery Path

If the system does not generate any attempt for a contact due to duplicate/invalid delivery paths, it follows the same behaviors as for Negative Acknowledgment (NACK). The next contact in the sequence (same layer or next layer depending on the escalation wait time and escalation time to next layers) is immediately notified.

Setting the Advanced Scheduling and deduplication Behavior

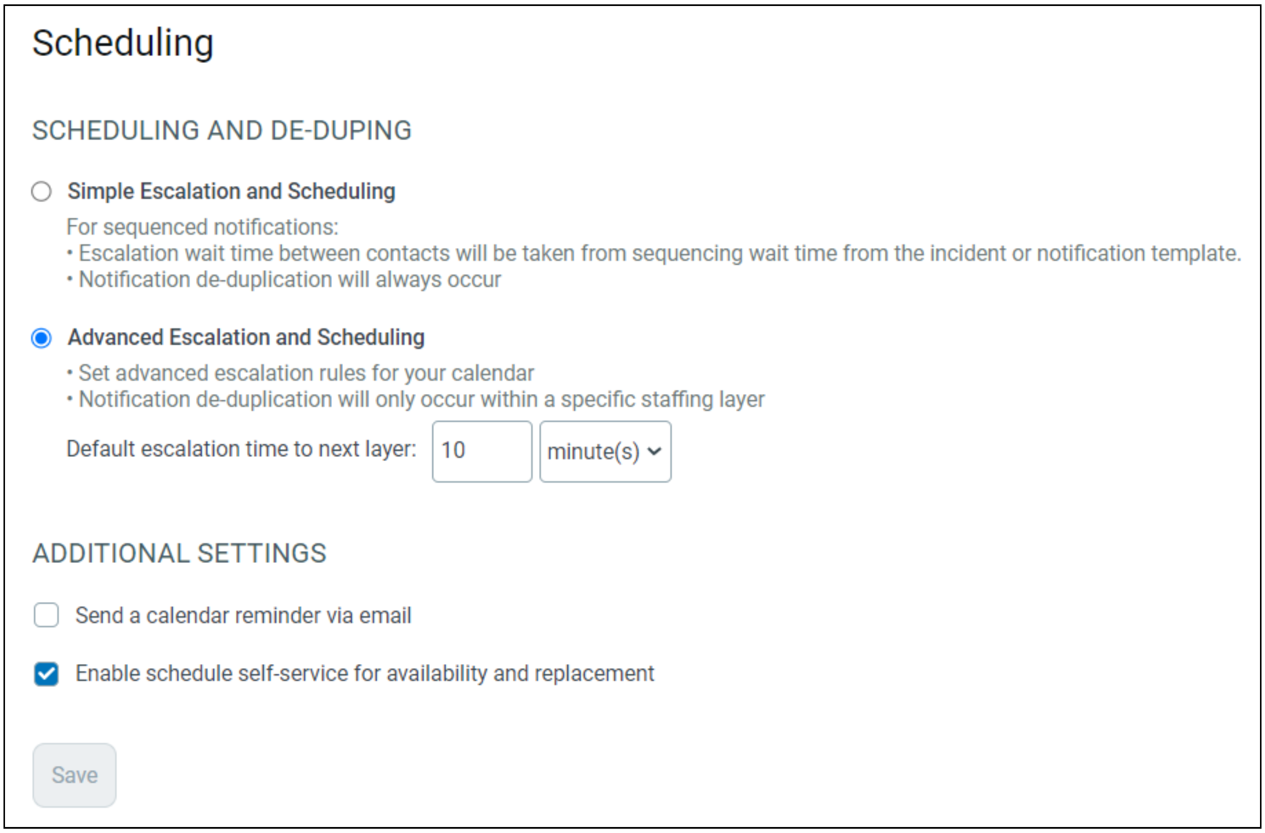
Within a Calendar, shifts can be sequenced or not sequenced. For sequenced shifts, escalations between staff are defined in the Incident template used to launch a specific incident.

You have the option to either use the Simple Escalation and Scheduling behavior or the Advanced Escalation and Scheduling behavior. The setting is on a per-organization basis.

By default, **Simple Escalation and Scheduling** is used, but you have the option to turn on/off the Advanced Escalation and Scheduling as desired. When turned on, the effect is immediate for all on-call staff.

NOTE: As staffing groups on sequenced shifts is not allowed in Simple Escalation and Scheduling mode, if you have staffed groups on layers for sequenced shifts while in Advanced Escalation and Scheduling mode, you cannot select the Simple Escalation and Scheduling option anymore. You must first remove all groups from staffing layers of sequenced shifts.

To turn on Advanced Escalation and Scheduling, navigate to **Settings > Organization > Contacts and Groups > Scheduling**.



In the **Scheduling and Deduping** section, select whether you want to use **Simple Escalation and Scheduling** or **Advanced Escalation and Scheduling**.

At a glance, the Advanced Scheduling allows you to specify for sequenced Notifications the escalation times to the next escalation layers as well as specify escalation options for a specific layer (use the Notification wait time or Send to all contacts at once). It also allows you to turn off de-duping between Calendars, shifts, and layers. De-duping only occurs within a specific staffing layer.

A default escalation time to the next escalation layer of 5 minutes is proposed by default. It applies to all layers for which an escalation time to the next layer has not been explicitly set. After you set it, the new time always applies. The default time can be changed at any time and applies immediately.

> **NOTE:** The Escalation time is a mandatory field with a maximum limit of 1440 minutes and 24 hours.

Staff Scheduling Examples

Scheduling Staff for a Daytime On-Call Calendar

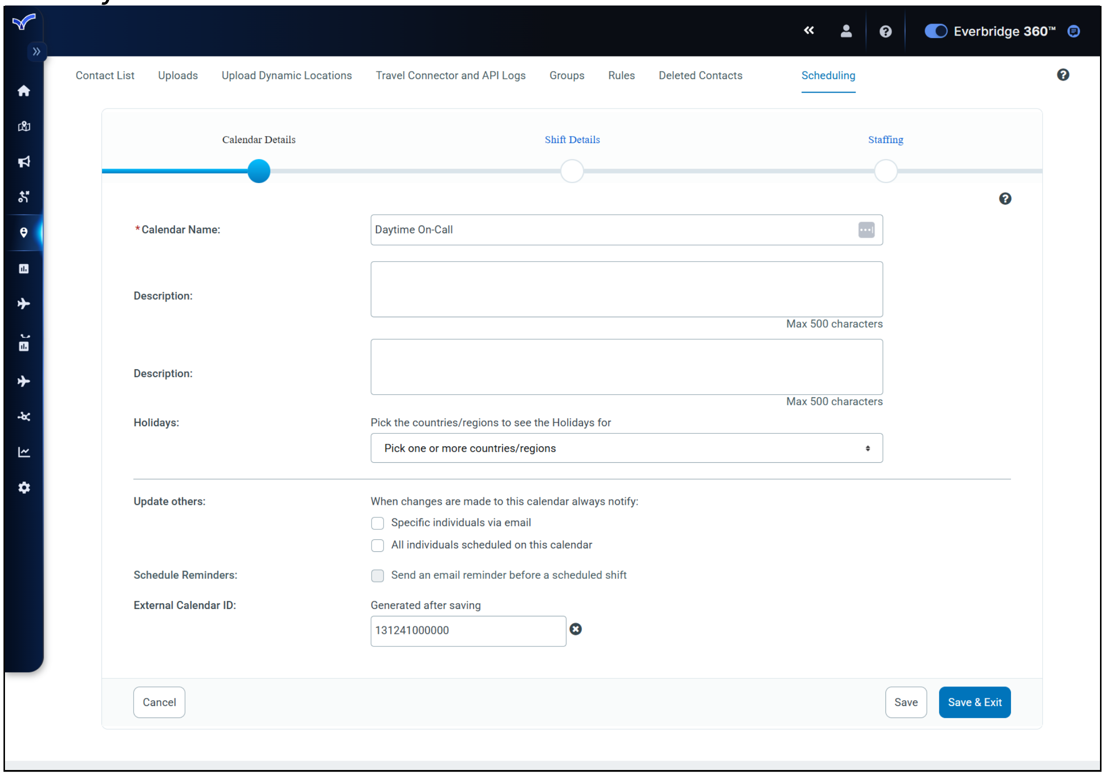
To schedule staff for a Daytime On-Call Calendar:

1. Analyze your schedule.
   - Shift Schedule (Time Zone, Time, and Days): Pacific Standard Time, 8:00 AM to 5:00 PM, Monday-Friday
   - Layers: There are two staffing layers:
     - Team Lead layer
     - Daytime Team layer
   - Rotation:
     - Team Lead layer: No rotation
     - Daytime Team layer: Rotate each week, second to first (the second staff member becomes the first staff member the following week)

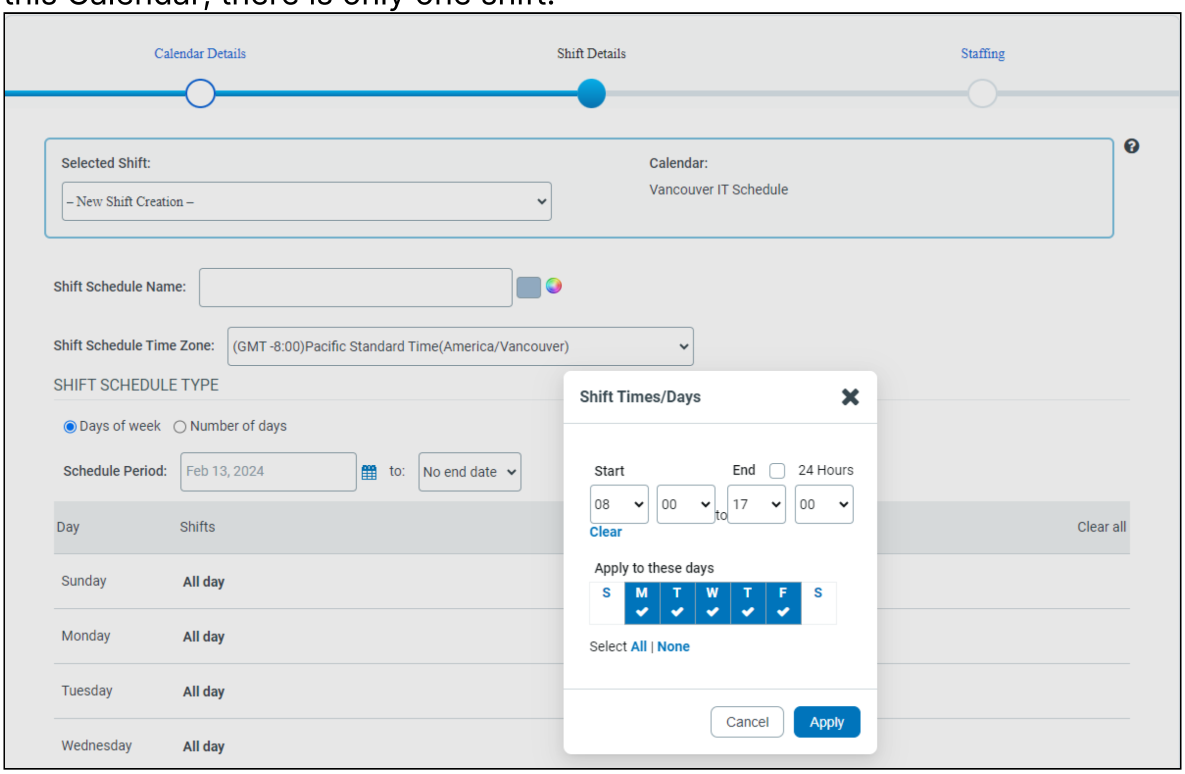
	A	B	C	D	E	F	G	H	I	J
7	Monday-Friday 08:00-17:00	Daytime On-Call								
8	First	Craig	Teresa	Scott	Brad	Sharon	Craig	Teresa	Scott	Brad
9	Second	Teresa	Scott	Brad	Sharon	Craig	Teresa	Scott	Brad	Sharon
10	Third	Scott	Brad	Sharon	Craig	Teresa	Scott	Brad	Sharon	Craig
11	Fourth	Brad	Sharon	Craig	Teresa	Scott	Brad	Sharon	Craig	Teresa
12	Fifth	Sharon	Craig	Teresa	Scott	Brad	Sharon	Craig	Teresa	Scott
13	**Team Lead**	Darren	Darren	Darren	Darren	Darren	Darren	Darren	Darren	Darren

2. Create your Calendar:
   a. Calendar Name: Daytime On-Call.
   b. Optionally, select the Update Others checkboxes, as needed. Enter email addresses (separate each email address with a comma).
   c. Optionally, click to create your own External Calendar ID. Otherwise, the External Calendar ID is automatically generated.

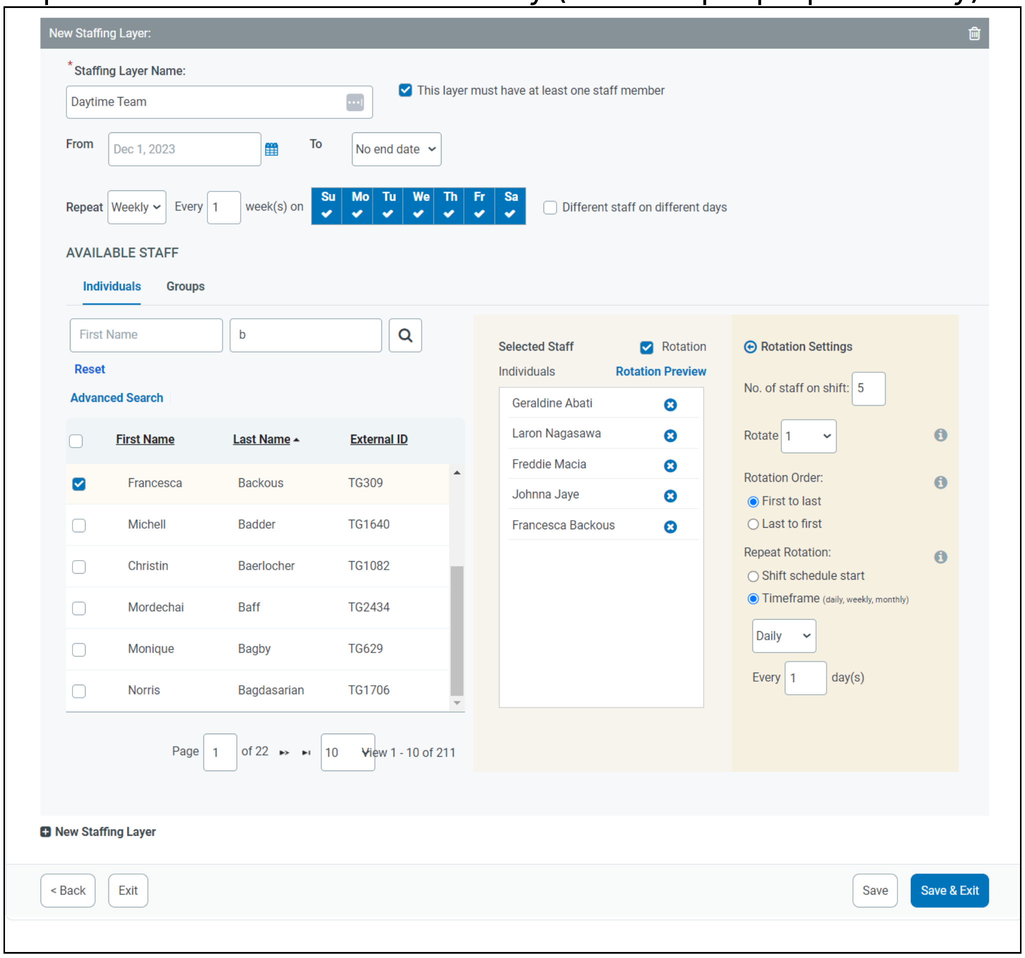
d. Optionally, select the countries/regions from the menu to see the Holidays on the Calendar.



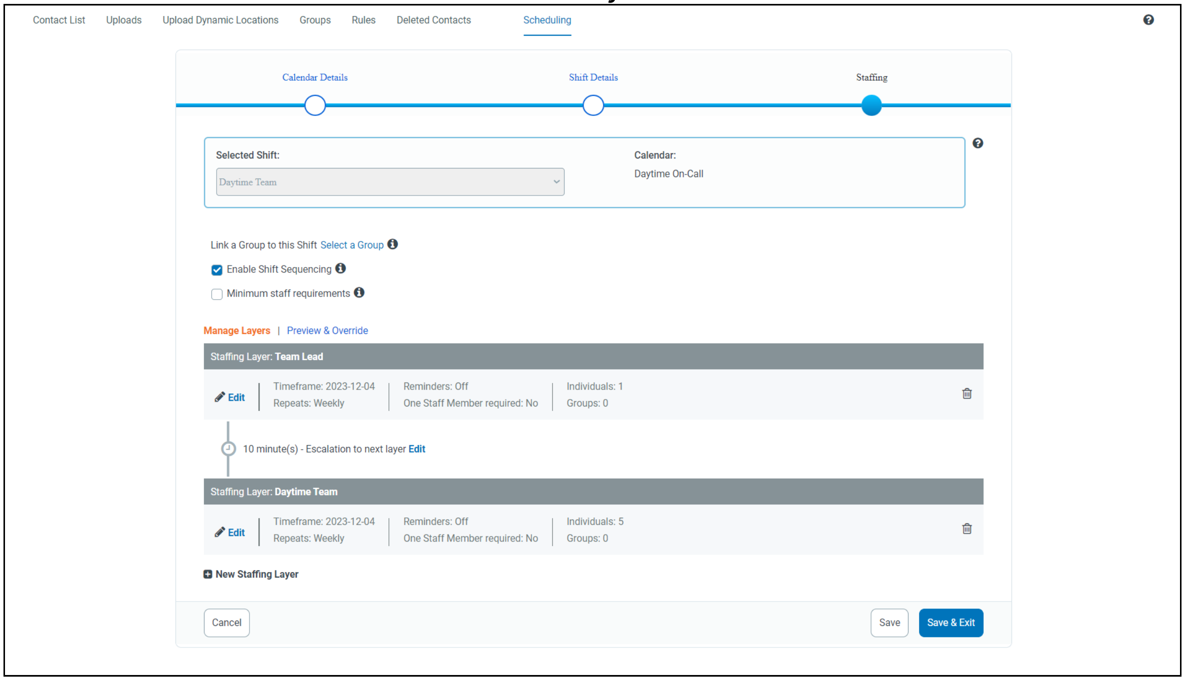
3. Add the shifts and staffing options (Link a Group to this Shift if needed. Enable escalation by selecting **Enable Shift Sequencing**) to this Calendar. In this Calendar, there is only one shift.



4. Add staff to each shift and any corresponding rotation.
    - Staffing layer1 - Team Lead
    - Staffing layer2 - Daytime Team
    -
        - No. of staff on shift - 5
        - Escalation Option - Use notification escalation settings
        - Rotate [#] staff members - 1
        - Rotation Order - First to Last
        - Repeat Rotation - Timeframe - Daily (for example purposes only)



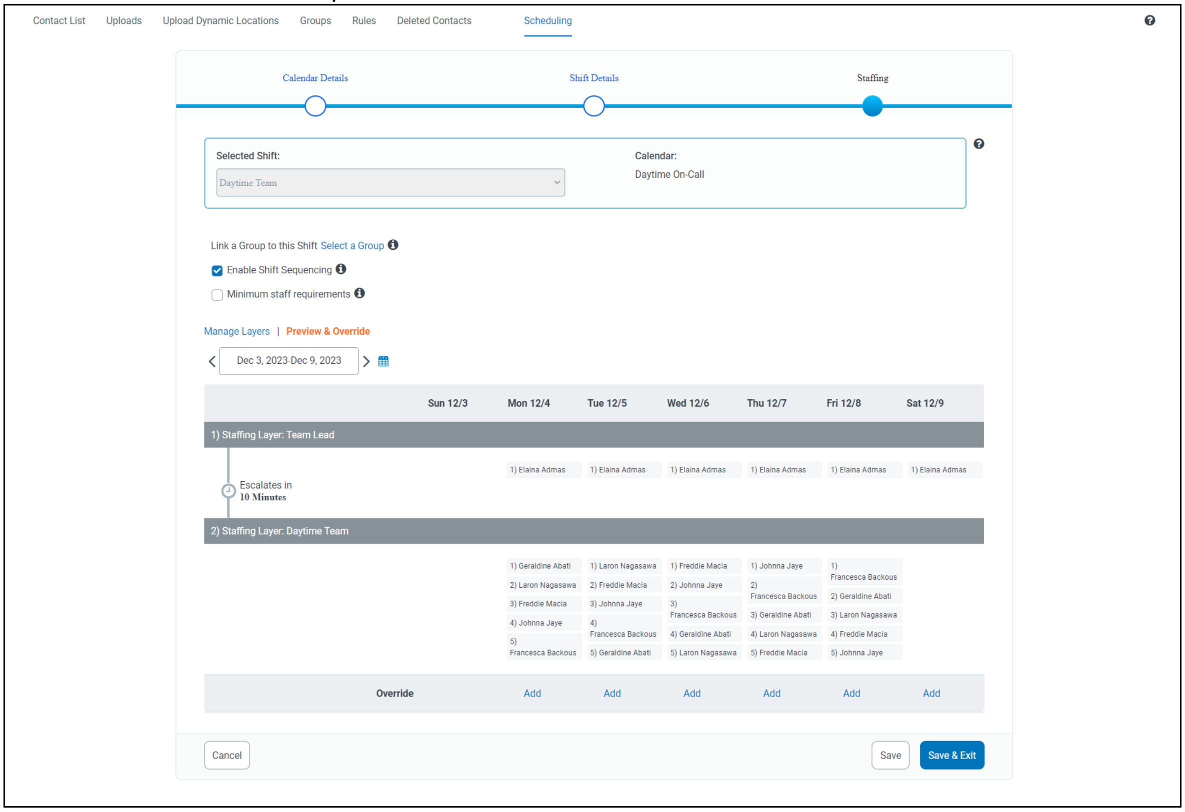
If the Escalation to the next layer is set to 0, the team lead will be notified at the same time as the first staff of the daytime team.



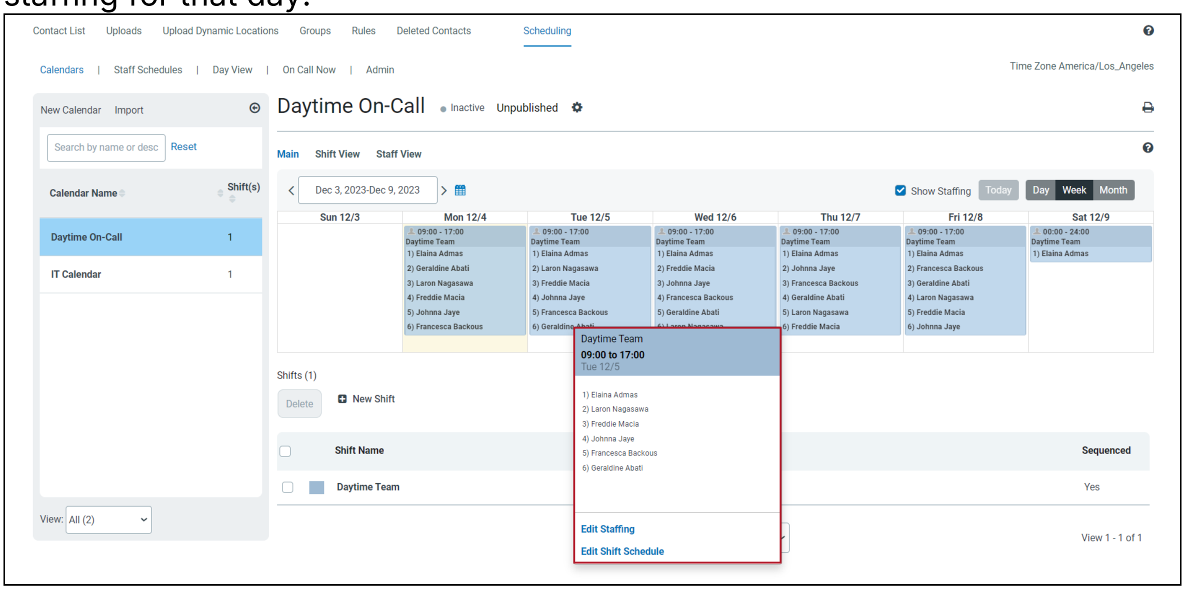
5. Edit the Daytime Layer and select **Rotation Preview**. Scroll as needed. Click **Save** when done.

   If you change the Rotation Settings (in the right-hand pane), select **Update Preview**.

6. Review your Staffing Layers after you have added all the layers by clicking **Preview and Override**, then click **Save & Exit**.



7. From the Calendar view, hover the mouse over a silhouette to view the staffing for that day.

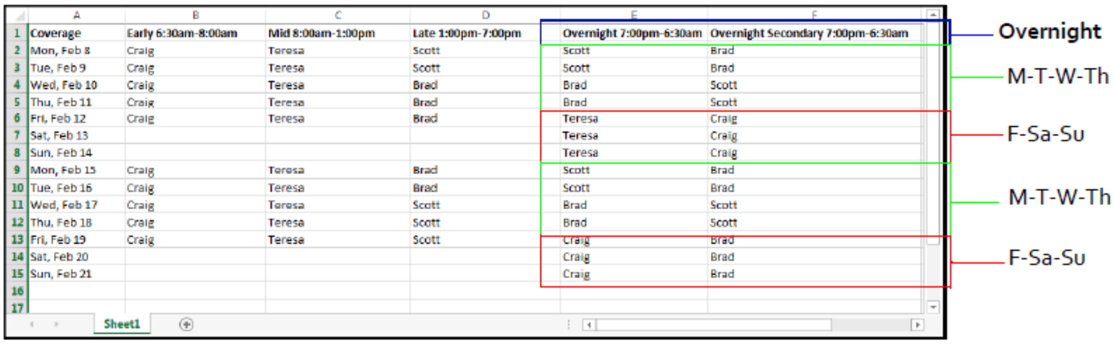


8. When an individual is not available, see the procedure, to provide dates to make an individual unavailable.
9. Click the **Make Active** action in the Calendar Action menu when you are done creating your schedule.

Scheduling Staff for an Overnight Calendar

To schedule staff for an Overnight Calendar:

1. Analyze your schedule.

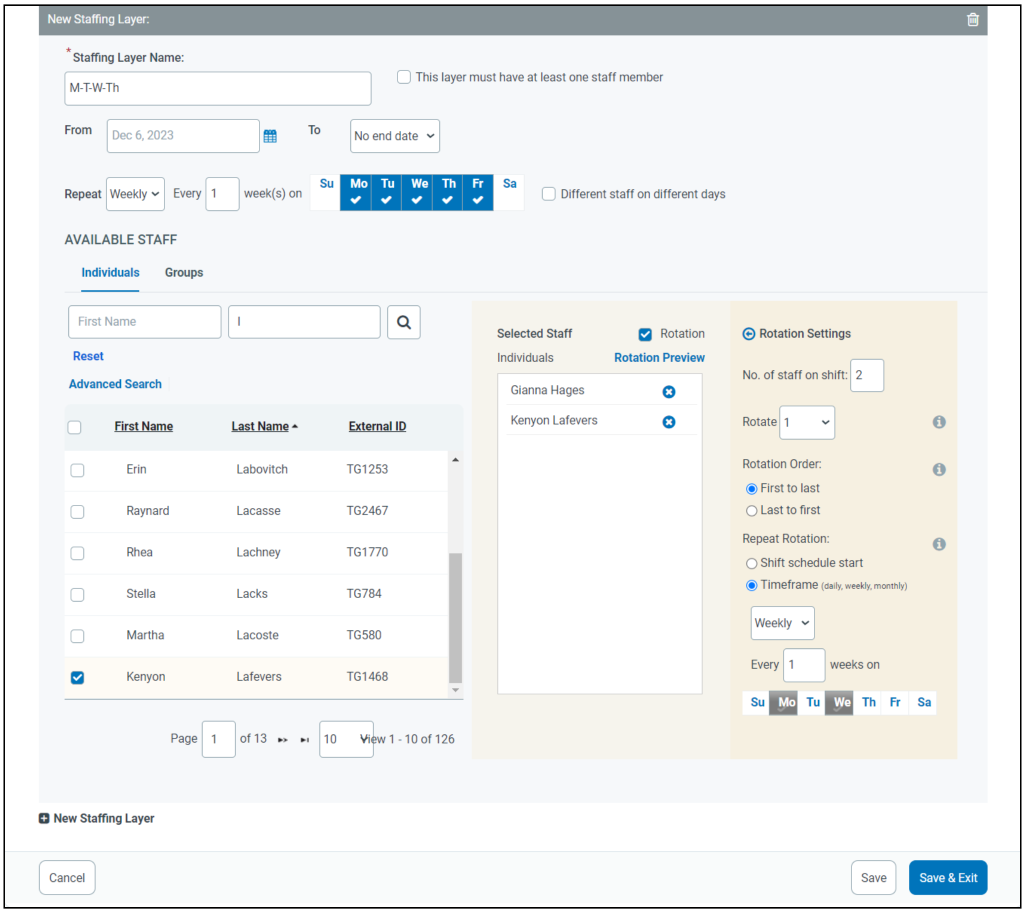


Coverage	Early 6:30am-8:00am	Mid 8:00am-1:00pm	Late 1:00pm-7:00pm	Overnight 7:00pm-6:30am	Overnight Secondary 7:00pm-6:30am
Mon, Feb 8	Craig	Teresa	Scott	Scott	Brad
Tue, Feb 9	Craig	Teresa	Scott	Scott	Brad
Wed, Feb 10	Craig	Teresa	Brad	Brad	Scott
Thu, Feb 11	Craig	Teresa	Brad	Brad	Scott
Fri, Feb 12	Craig	Teresa	Brad	Teresa	Craig
Sat, Feb 13				Teresa	Craig
Sun, Feb 14				Teresa	Craig
Mon, Feb 15	Craig	Teresa	Brad	Scott	Brad
Tue, Feb 16	Craig	Teresa	Brad	Scott	Brad
Wed, Feb 17	Craig	Teresa	Scott	Brad	Scott
Thu, Feb 18	Craig	Teresa	Scott	Brad	Scott
Fri, Feb 19	Craig	Teresa	Scott	Craig	Brad
Sat, Feb 20				Craig	Brad
Sun, Feb 21				Craig	Brad

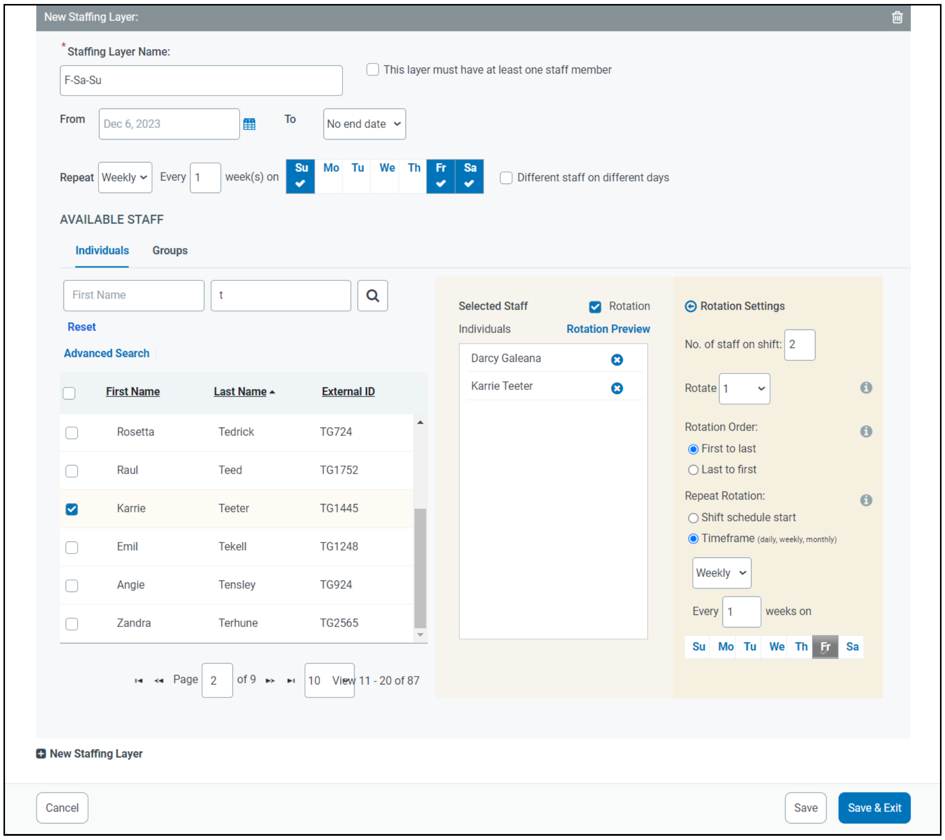
- Shift Schedule (Time Zone, Time, and Days): Pacific Standard Time, 24-hours/day, Weekly
- Layers:
  - Team Lead layer (not shown above)
  - M-T-W-Th layer
  - F-Sa-Su layer
- Rotation:
  - Team Lead layer: No rotation
  - M-T-W-Th layer: 2 staff rotate Mondays and Wednesdays
  - F-Sa-Su layer: 2 of 3 staff rotate weekly every Friday

2. Create your Calendar:
   a. Calendar Name: Overnight.
   b. Optionally, select the Update Others checkboxes, as needed. Enter email addresses (separate each email address with a comma).
   c. Optionally, click to create your own External Calendar ID. Otherwise, the External Calendar ID is automatically generated.
   d. Optionally, select the Update Others checkboxes, as needed. Enter email addresses (separate each email address with a comma).
   e. Optionally, click to create your own External Calendar ID. Otherwise, the External Calendar ID is automatically generated.
3. Add the shifts.
4. Specify staffing options (Link a Group to this Shift if needed. Enable escalation by selecting Enable Shift Sequencing) and add staff to the shift and any corresponding rotation. Once finished, click **Save & Exit**.
   - Staffing Layer 1: Team Lead
   - Staffing Layer 2: M-T-W-Th
     - No. of staff on shift: 2
     - Rotate [#] staff members: 1
     - Rotation Order: First to Last

- Repeat Rotation: Timeframe—Weekly on Monday and Wednesday

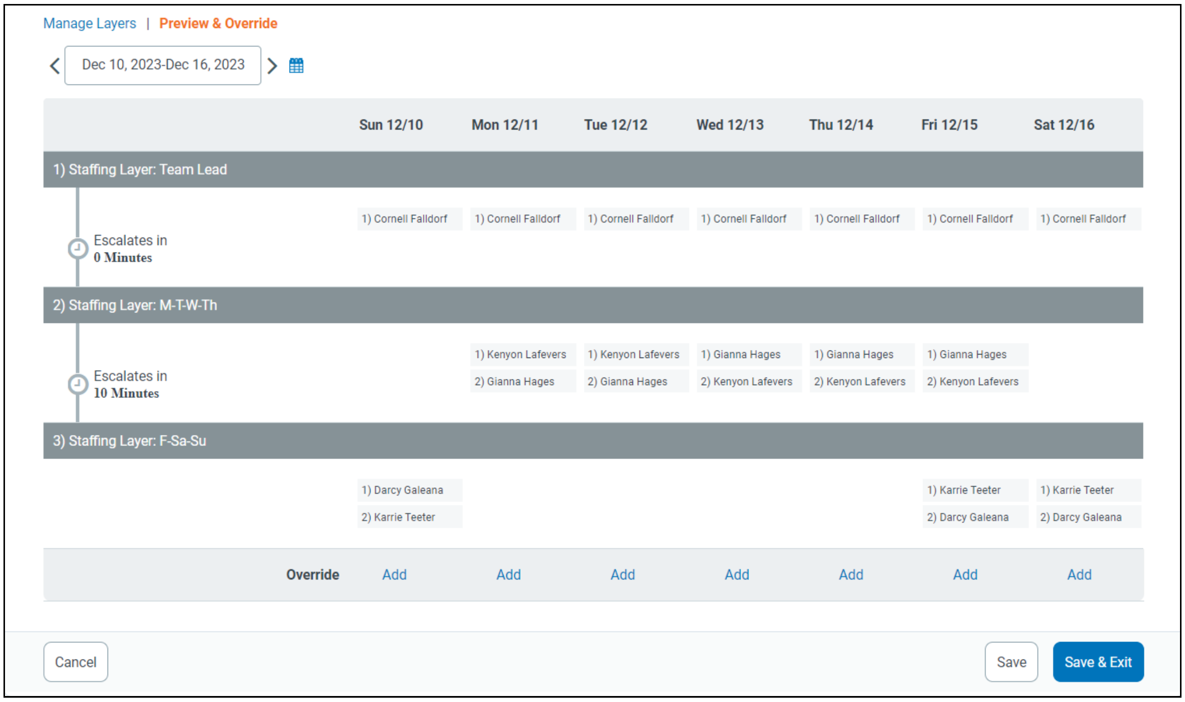


- Staffing Layer 3: F-Sa-Su
  - No. of staff on shift: 2 of 3
  - Rotate [#] staff members: 1
  - Rotation Order: First to Last
  - Repeat Rotation: Timeframe—Weekly on Friday

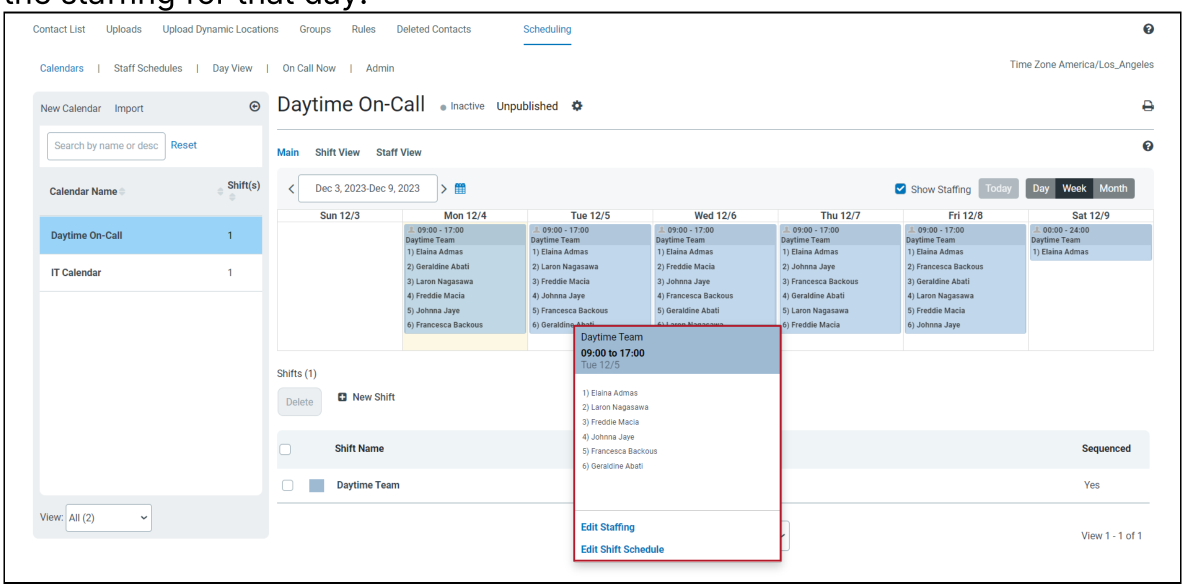


5. Define your escalation rules: Order your layers and set escalation time to the next layer (Advanced Escalation and Scheduling only).

   Set the escalation from Team Lead to M-T-W-Th to 0 if you want the Team Lead to be notified at the same time as the overnight staff.
6. Click **Preview & Override** to review your schedule, then **Save & Exit**.



7. Return to the Calendar view and hover the mouse over a silhouette to view the staffing for that day.



8. Set unavailability for any of the Staff.
9. Click **Make Active** when you are done creating your schedule.

Scheduling Staff for an Ortho On-Call Calendar

To schedule staff for an Ortho On-Call Calendar:

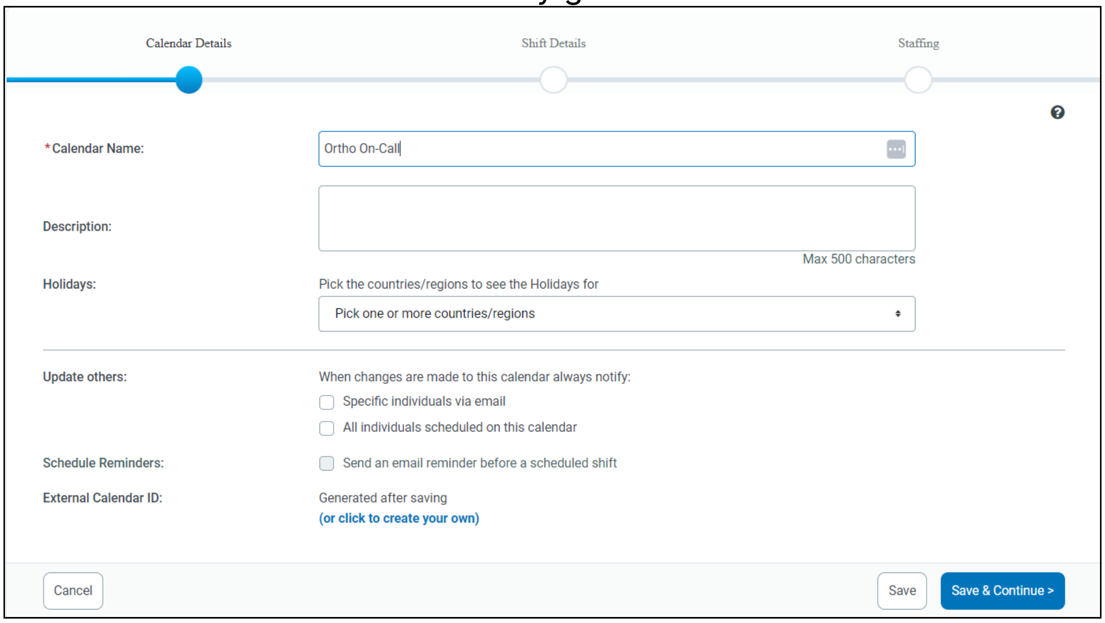
1. Analyze your schedule.

Day	Date	Attending	Office Phone	Pager
Monday	2/15/2016	Sharon	(626) 485-9669	661-296-6515
Tuesday	2/16/2016	Sharon	(626) 485-9669	661-296-6515
Wednesday	2/17/2016	Sharon	(626) 584-9669	661-296-6515
Thursday	2/18/2016	Sharon	(626) 485-9669	661-296-6515
Friday	2/19/2016	Teresa	(661) 993-8074	818-230-9732
Saturday	2/20/2016	Teresa	(661) 993-8074	818-230-9732
Sunday	2/21/2016	Teresa	(661) 993-8074	818-230-9732
Monday	2/22/2016	Teresa	(661) 993-8074	818-230-9732
Tuesday	2/23/2016	Teresa	(661) 993-8074	818-230-9732
Wednesday	2/24/2016	Teresa	(661) 993-8074	818-230-9732
Thursday	2/25/2016	Teresa	(661) 993-8074	818-230-9732
Friday	2/26/2016	Scott	310-991-5526	310-529-3487
Saturday	2/27/2016	Scott	310-991-5526	310-529-3487
Sunday	2/28/2016	Scott	310-991-5526	310-529-3487
Monday	2/29/2016	Scott	310-991-5526	310-529-3487
Tuesday	3/1/2016	Scott	310-991-5526	310-529-3487
Wednesday	3/2/2016	Scott	310-991-5526	310-529-3487
Thursday	3/3/2016	Scott	310-991-5526	310-529-3487

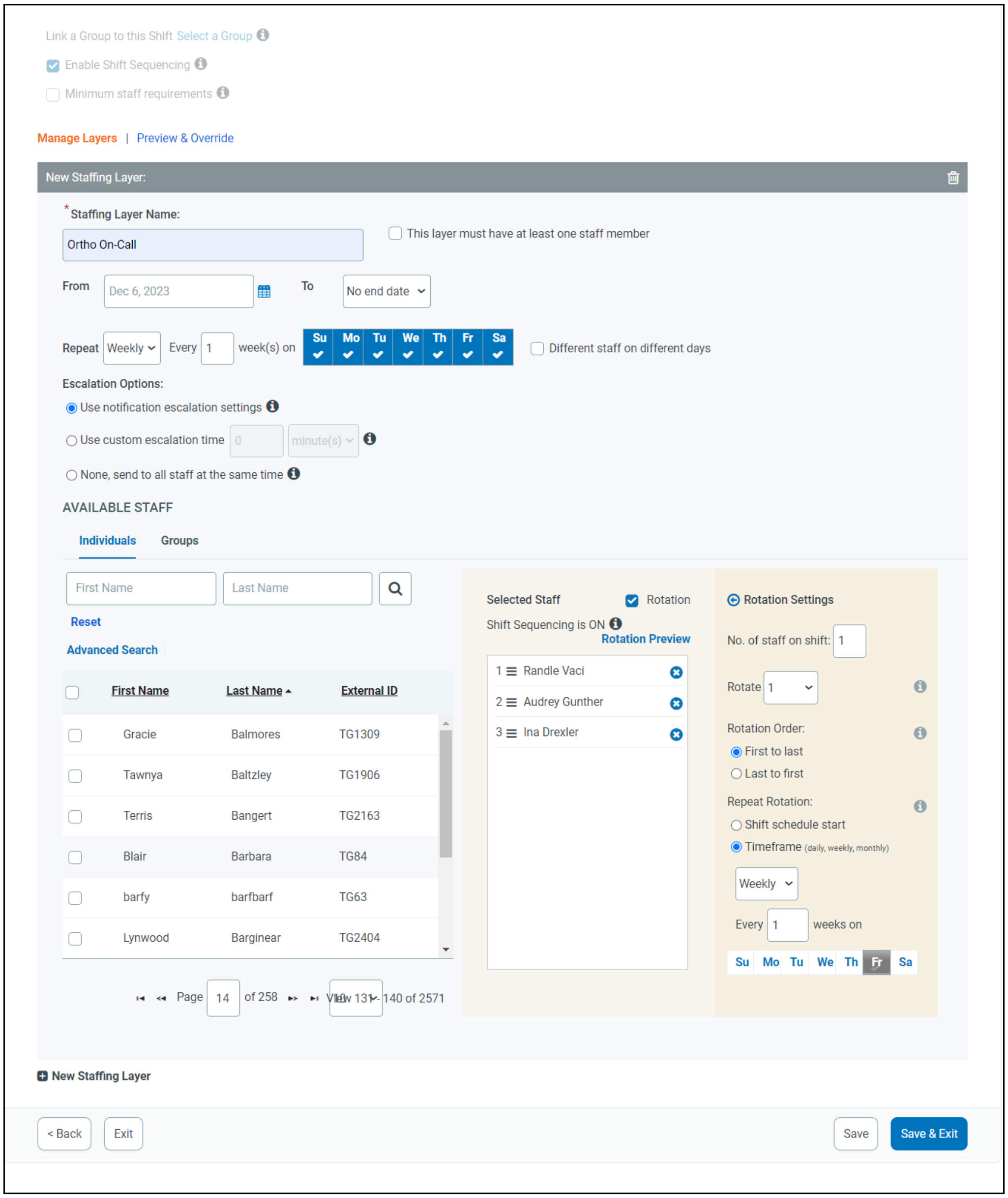
- Shift Schedule: Pacific Standard Time, 24-hours/day
- Layers: There is one staffing layer.
- Rotation: Rotation every Friday.

2. Create your Calendar:
   a. Calendar Name: Ortho On-Call.
   b. Optionally, select the Update Others checkboxes, as needed. Enter email addresses (separate each email address with a comma).
   c. Optionally, click to create your own External Calendar ID. Otherwise, the External Calendar ID is automatically generated.
   d. Optionally, select the Update Others checkboxes, as needed. Enter email addresses (separate each email address with a comma).

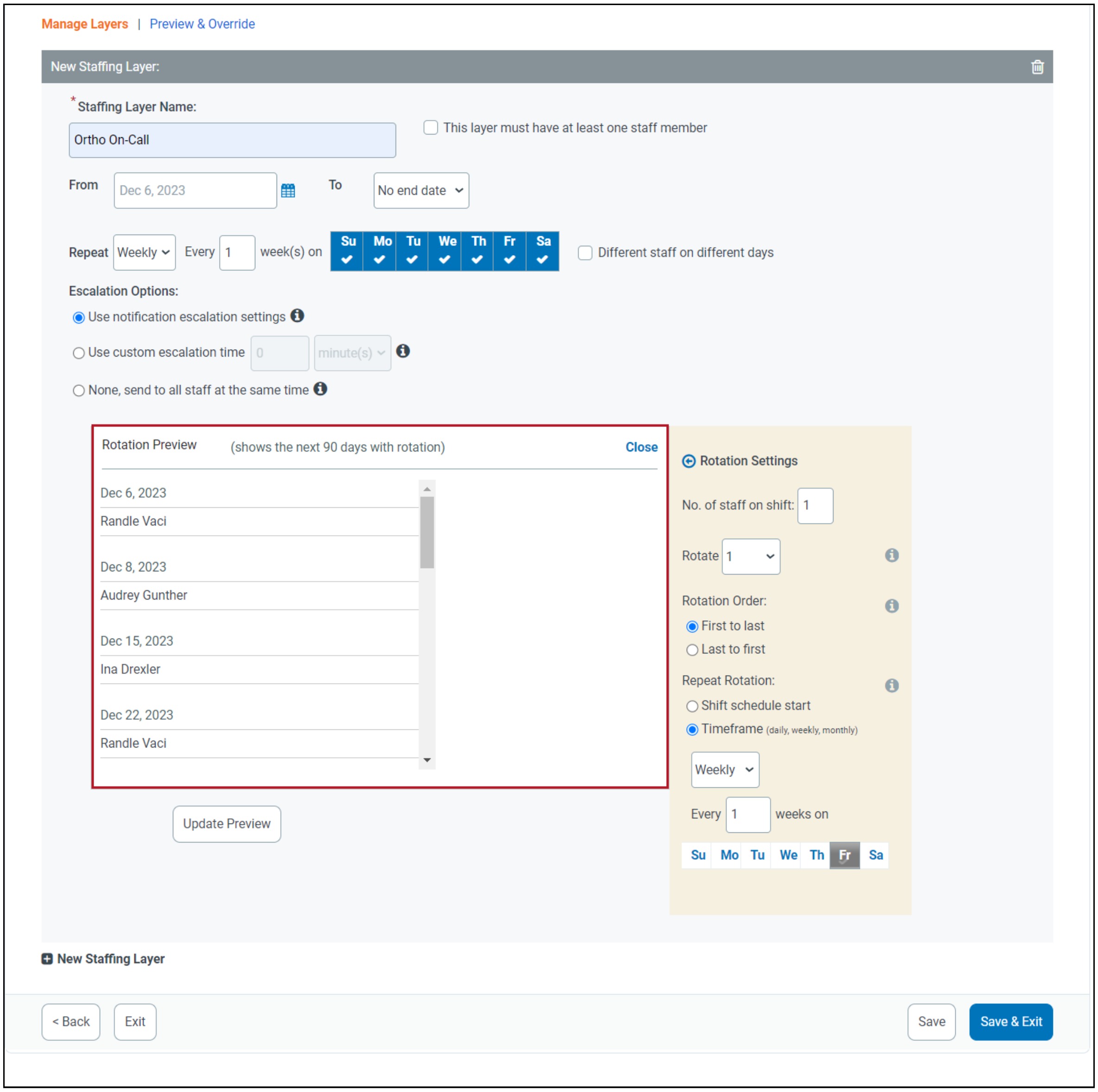
e. Optionally, click to create your own External Calendar ID. Otherwise, the External Calendar ID is automatically generated.



3. Add the shifts.
4. Specify staffing options (Link a Group to this Shift if needed. Enable escalation by selecting Enable Shift Sequencing) to this Calendar.
5. Add staff to each shift and any corresponding rotation.
    - Staffing Layer 1: Ortho On-Call
        - No. of staff on shift: 1
        - Rotate {#] staff members: 1
        - Rotation Order: First to Last
        - Repeat Rotation: Timeframe—Weekly on Friday

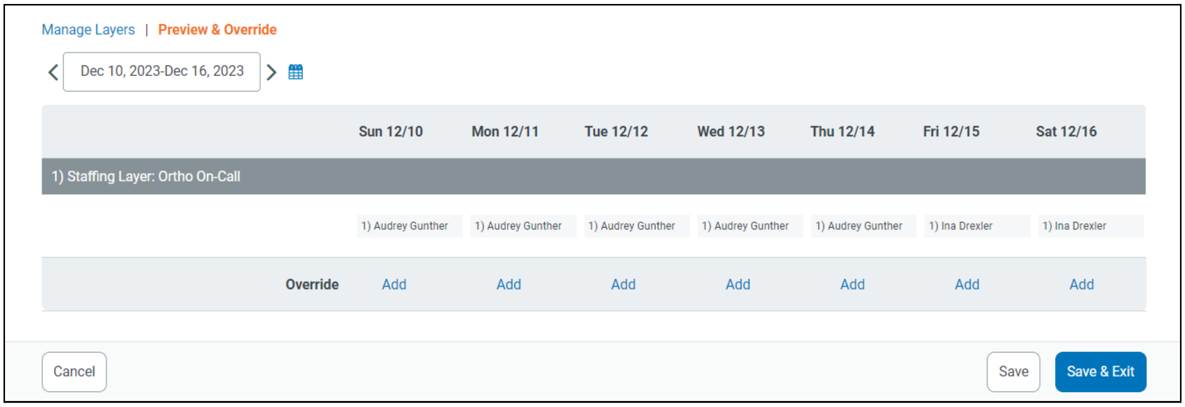

Link a Group to this Shift Select a Group
Enable Shift Sequencing
Minimum staff requirements
Manage Layers | Preview & Override
New Staffing Layer:
Staffing Layer Name:
Ortho On-Call
This layer must have at least one staff member
From
Dec 6, 2023
To
No end date
Repeat
Weekly
Every
1
week(s) on
Su Mo Tu We Th Fr Sa
Different staff on different days
Escalation Options:
Use notification escalation settings
Use custom escalation time
minute(s)
None, send to all staff at the same time
AVAILABLE STAFF
Individuals
Groups
First Name
Last Name
Reset
Advanced Search
First Name
Last Name
External ID
Gracie Balmores TG1309
Tawnya Baltzley TG1906
Terris Bangert TG2163
Blair Barbara TG84
barfy barfbarf TG63
Lynwood Barginear TG2404
Page 14 of 258
140 of 2571
Selected Staff
Rotation
Shift Sequencing is ON
Rotation Preview
1 Randle Vaci
2 Audrey Gunther
3 Ina Drexler
Rotation Settings
No. of staff on shift: 1
Rotate 1
Rotation Order:
First to last
Last to first
Repeat Rotation:
Shift schedule start
Timeframe (daily, weekly, monthly)
Weekly
Every 1 weeks on
Su Mo Tu We Th Fr Sa
New Staffing Layer
< Back
Exit
Save
Save & Exit

6. From the Add/Edit Staff dialog, select **Rotation Preview**. Scroll as needed. Click **Save** when done.



- If you change the Rotation Settings (in the right-hand pane), select the Update Preview button.

7. Once all of the staffing layers have been added, review them by selecting **Preview & Override**, then click **Save and Exit**.



8. From the Calendar view, hover the mouse over a silhouette to view the staffing for that day. Set unavailability for any of the Staff (see Setting Unavailability section).
9. Click the **Make Active** button when you are done creating your schedule.

Scheduling Staff for an 8-Day Firefighter Option

To schedule staff for an 8-Day Firefighter option:

1. Analyze your schedule. There might be different options to create your schedule.

8-Day Rotation

Day Shift (D) – 0800 to 1800

Night Shift (N) – 1800 to 0800

400 Firefighters

4 Groups:

- 1 – O, O, D, D, O, N, N, O
- 2 – N, O, O, O, D, D, O, N
- 3 – O, N, N, O, O, O, D, D
- 4 – D, D, O, N, N, O, O, O

June 2016

			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17 Day 1 (4,2)	18 Day 2 (4, 3)
19 Day 3 (1,3)	20 Day 4 (1,4)	21 Day 5 (2,4)	22 Day 6 (2, 1)	23 Day 7 (3,1)	24 Day 8 (3, 2)	25
26	27	28	29	30	31	

Option 1:

- Shift Schedule (Time Zone, Time, and Day): Pacific Standard Time

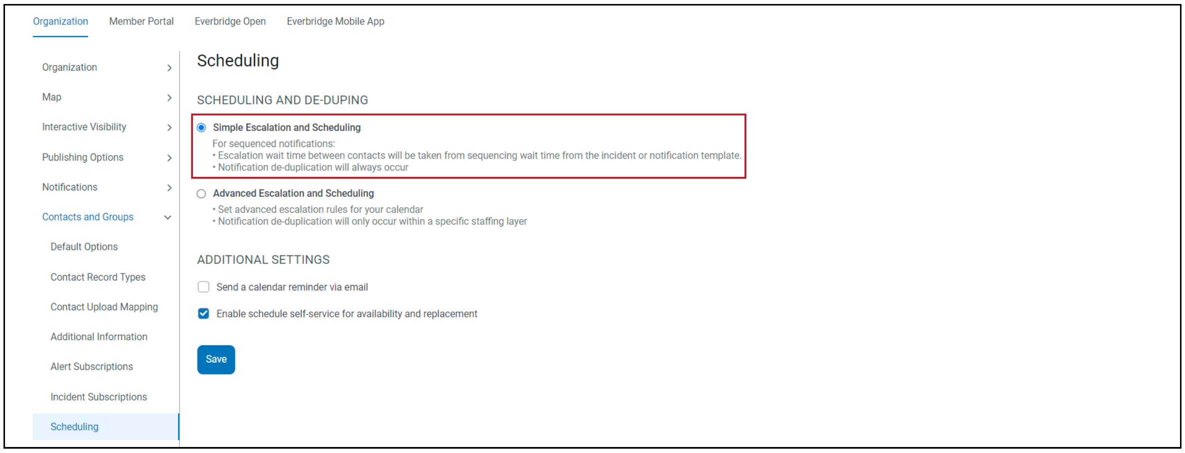
    - 08:00 to 20:00 DD
    - 20:00 to 08:00 NN
  - Layers: 1 staffing layer per shift
    - DDOO for DD shift schedule
    - NNOO for NN shift schedule
  - Rotation: Rotate 2 staff every Shift Schedule Start (in this case, every 2 days)
    - DD | DD | DD | DD (Team order: 4, 1, 2, 3)
    - NN | NN | NN | NN (Team order: 3, 4, 1, 2)

  Option 2: (Option 2 is provided as an example in this documentation)

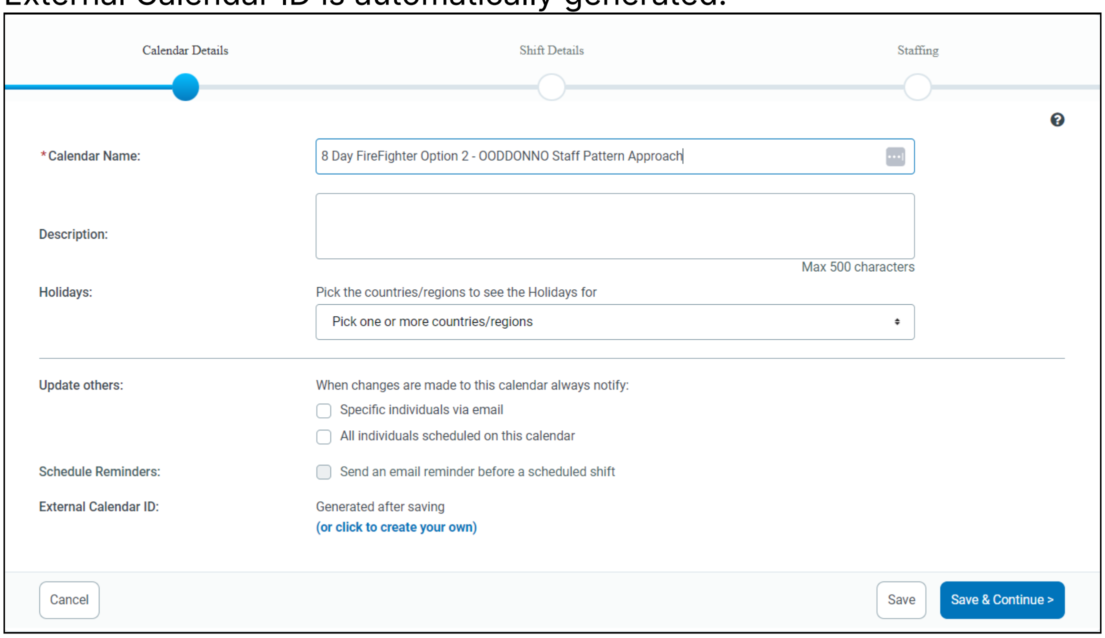
  - Shift Schedule (Time Zone, Time, and Day): Pacific Standard Time: Shifts/Teams 1-4. (O = Off; D = Day; N = Night)
    - 08:00 to 18:00 and 18:00 to 08:00 DDONNOOO
    - 18:00 to 08:00 and 08:00 to 18:00 NOOODDON
    - 18:00 to 08:00 and 08:00 to 18:00 ONNOOODD
    - 08:00 to 18:00 and 18:00 to 08:00 OODDONNO
  - Layers: There is one layer per shift.
  - Rotation: Rotate staff by the order shown next:
    - Shift 1: DDONNOOO (for Team 1)
    - Shift 2: NOOODDON (for Team 2)
    - Shift 3: ONNOOODD (for Team 3)
    - Shift 4: OODDONNO (for Team 4)

  Option 3:

  - Shift Schedule (Time Zone, Time, and Day): Pacific Standard Time
    - 06:00 to 18:00 Day Shift: 4 4 1 1 2 2 3 3
    - 18:00 to 06:00 Night Shift: 2 3 3 4 4 1 1 2
  - Layers: 1 staffing layer per shift
    - Day Shift for Day Shift — 8-Day shift schedule
    - Night Shift for Night Shift — 8-Day shift schedule
  - Rotation: Different staff on different days (no rotation).
2. Set the scheduling option at the Organization level to **Simple Escalation and Scheduling**.



3. Create your Calendar:
    a. Calendar Name: 8-Day FireFighter Option 2 - OODDONNO Staff Pattern Approach.
    b. Optionally, select the Update Others checkboxes, as needed. Enter email addresses (separate each email address with a comma).
    c. Optionally, click to create your own External Calendar ID. Otherwise, the External Calendar ID is automatically generated.
    d. Optionally, select the Update Others checkboxes, as needed. Enter email addresses (separate each email address with a comma).
    e. Optionally, click to create your own External Calendar ID. Otherwise, the External Calendar ID is automatically generated.



4. Add the shifts to this Calendar.
5. Specify staffing options (Link a Group to this Shift if needed. Enable escalation by selecting Enable Shift Sequencing if needed) and add staff. For each shift add the corresponding staff and rotation.

6. From the Calendar View, hover the mouse over a silhouette to view the staffing for that day.
7. Set unavailability for any of the Staff (see Setting Unavailability section).
8. Click **Make Active** when you are done creating your schedule.

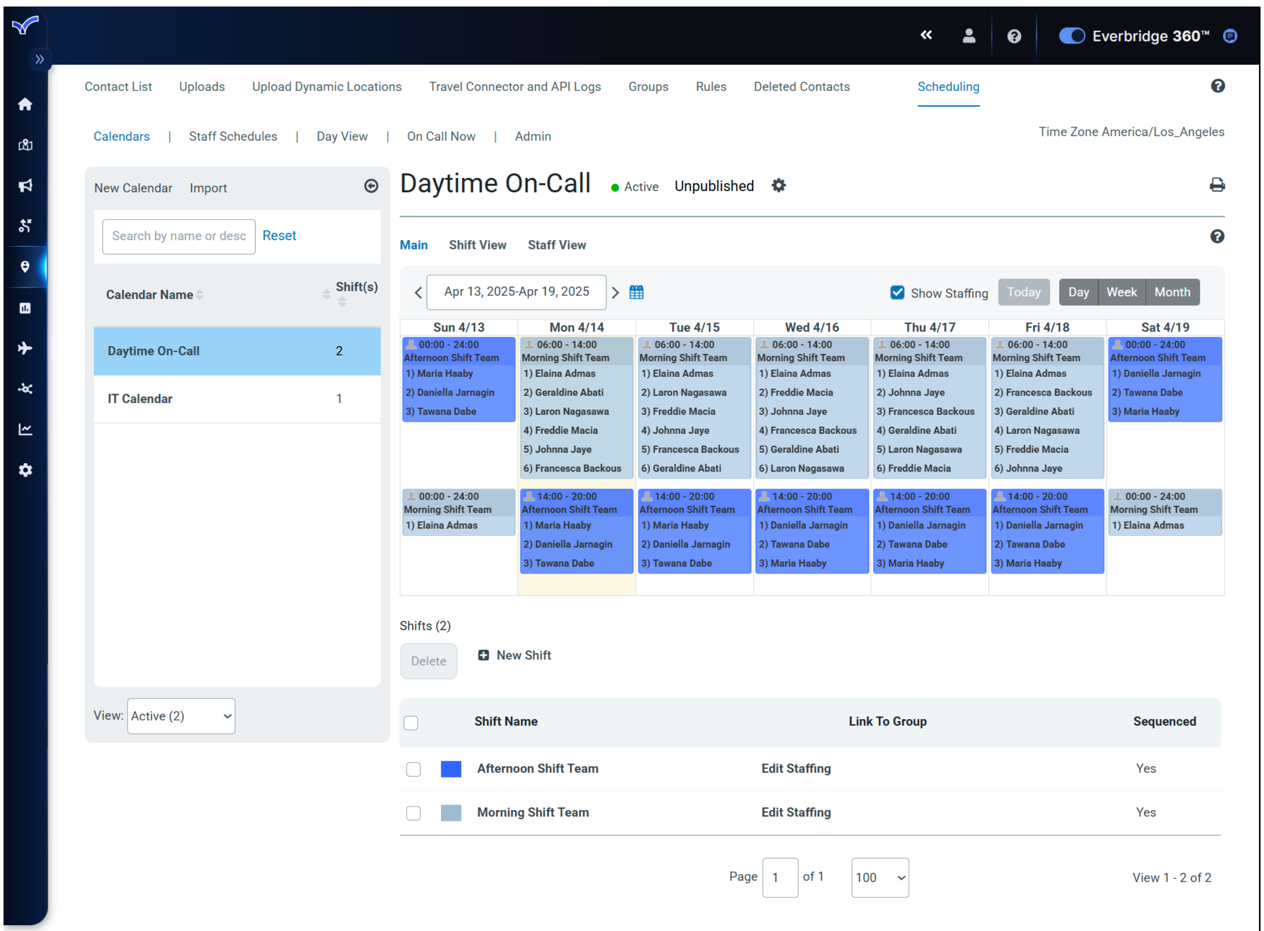
Viewing a Schedule

Once your Calendar is staffed, you can view your schedule from the **Scheduling** home page.

Calendar View

Main View

The **Main Calendar View** is the default view when accessing the scheduling area. It displays by default the list of active Calendars, and for a selected Calendar, a graphical representation of the shifts and a table with the list of shifts. Shifts will display in the user's time zone, not in the time zone of the shift.



In the list of Calendars, a drop-down menu allows you to toggle between different filters:

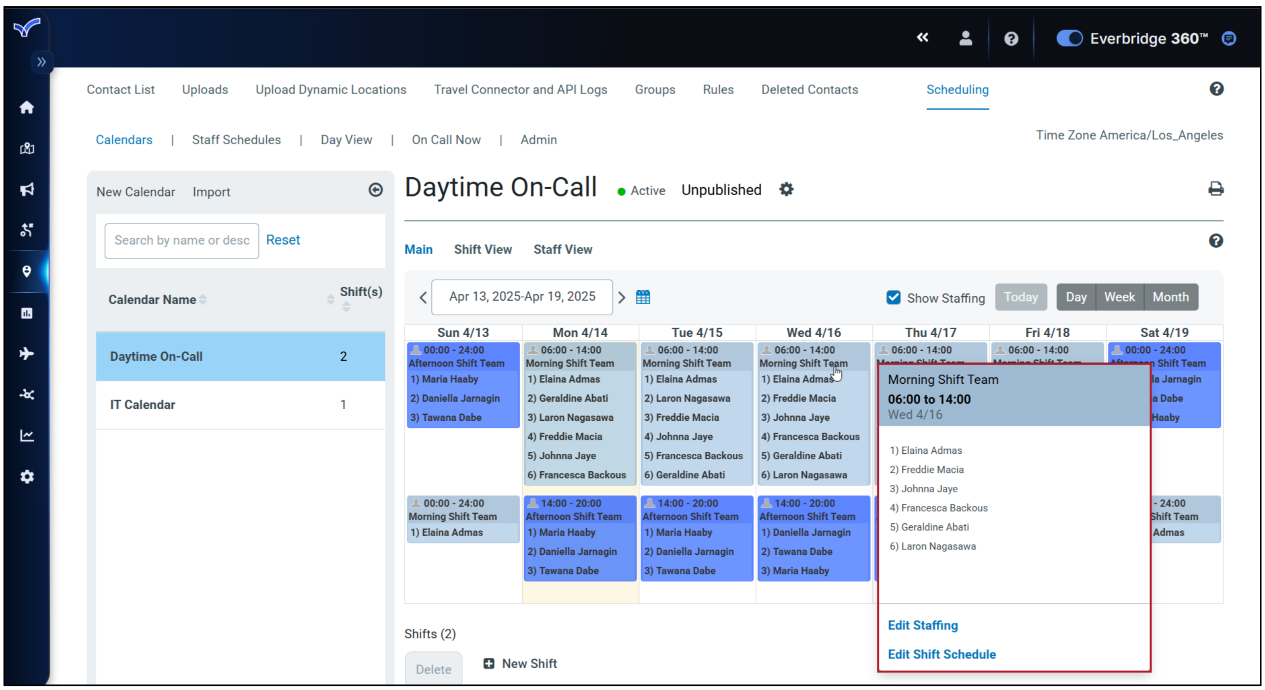
- **All:** Displays active and inactive Calendars
- **Active:** Displays only the active Calendars (published or not)

- **Inactive**: Displays only the inactive Calendars
- **Published**: Displays only the list of active and published Calendars
- **Unpublished**: Displays the list of unpublished Calendars (active or not)

You can expand or collapse your Calendar by selecting the arrow in the **Calendar** pane.

When viewing a Calendar in the Calendar list, you can access the specific actions for this Calendar: **Edit**, **Copy**, or **Delete**. (You can also access these actions from the **Action** menu.

In the **Graphical** view, when you hover the mouse over a shift, you can see the staffing for that shift and directly access actions to edit the shift staffing or schedule. You can select to display the Calendar for the **Day**, **Week**, or **Month** by selecting the option on the right-hand side.



NOTE: If **Month** is selected, the selected holidays will be displayed.

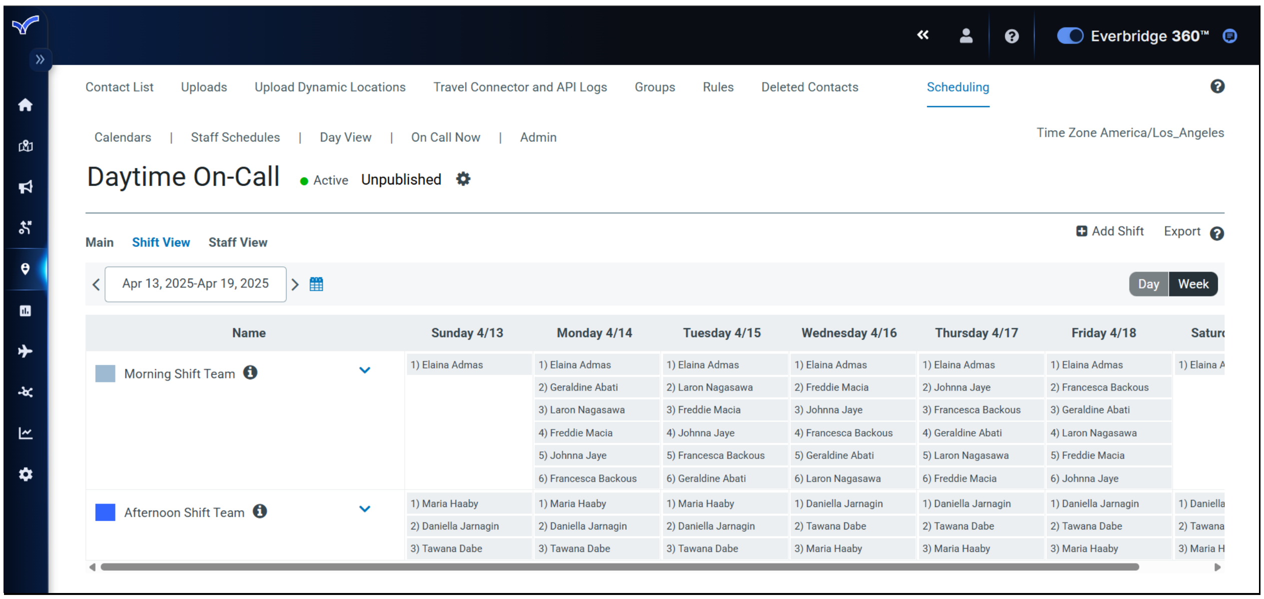
You can hide the staffing for the Calendar by clearing the **Show Staffing** checkbox. This selection persists for the entire user session and all Calendars.

A warning icon is displayed if there is a staffing issue in a specific shift. Hover the mouse over the shift to see more details.

The **shift table** displays the list of shifts for this Calendar, where you can delete or add a new shift, edit a shift schedule by selecting the shift, edit the staffing, see the group linked to the shift, and see whether the shift is sequenced or not.

Shift View

The **Shift View** lists all the shifts and the daily staffing for each shift. Shifts will display in the user's time zone, not in the time zone of the shift.



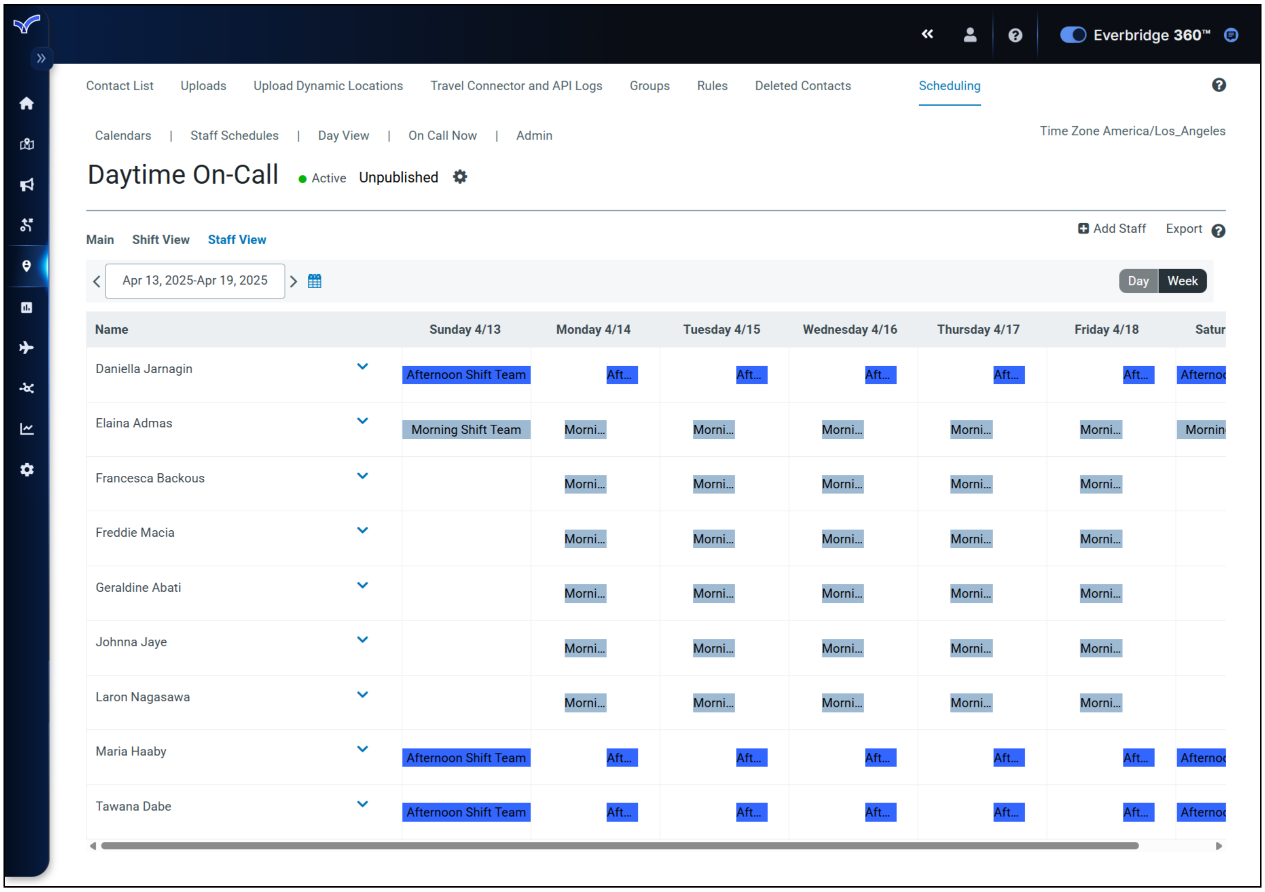
You can select any of the following:

- **Staffing**—edit or delete individuals from shifts.
- **Clear all staff**—remove all staff from the current shift. When you select this option, you must confirm the deletion of staff from the current shift.

In the **Shift** view, all the layers are consolidated into a single view. It displays the layer in the order of priority for the notification engine. The top layer has a higher priority than the lower layer. The Override layer has the highest priority.

Staff View

Staff View allows you to display all the staff for a specific Calendar during a specific time frame. Shifts will display in the user's time zone, not in the time zone of the shift.



From the staff view, you can select any of the following:

- **Scheduling**-edit or delete this individual's schedule.
- **Make unavailable**-provide dates that a selected individual is unavailable, for example, on vacation or holiday. The Staff view for the individual displays "UNAVAILABLE", removing the person from any shifts. The individual cannot be added to any shifts while unavailable.
- **Clear from all shifts**-remove this individual from all shifts on this Calendar.

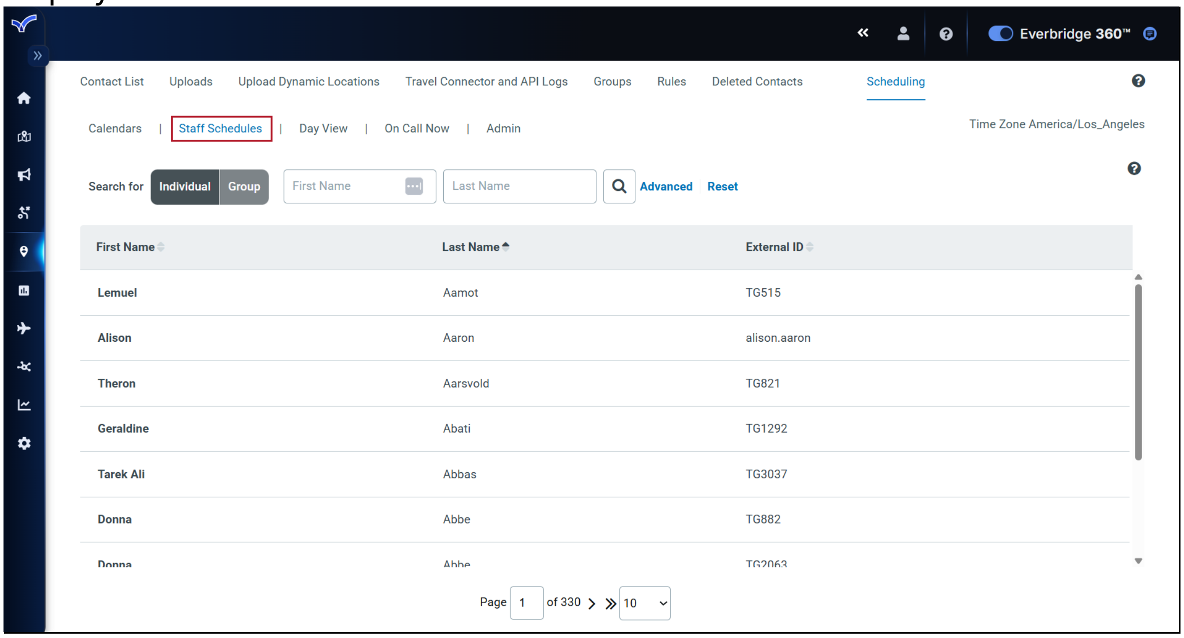
Staff Schedules

You can see an individual's schedule directly from the **Scheduling** subtab.

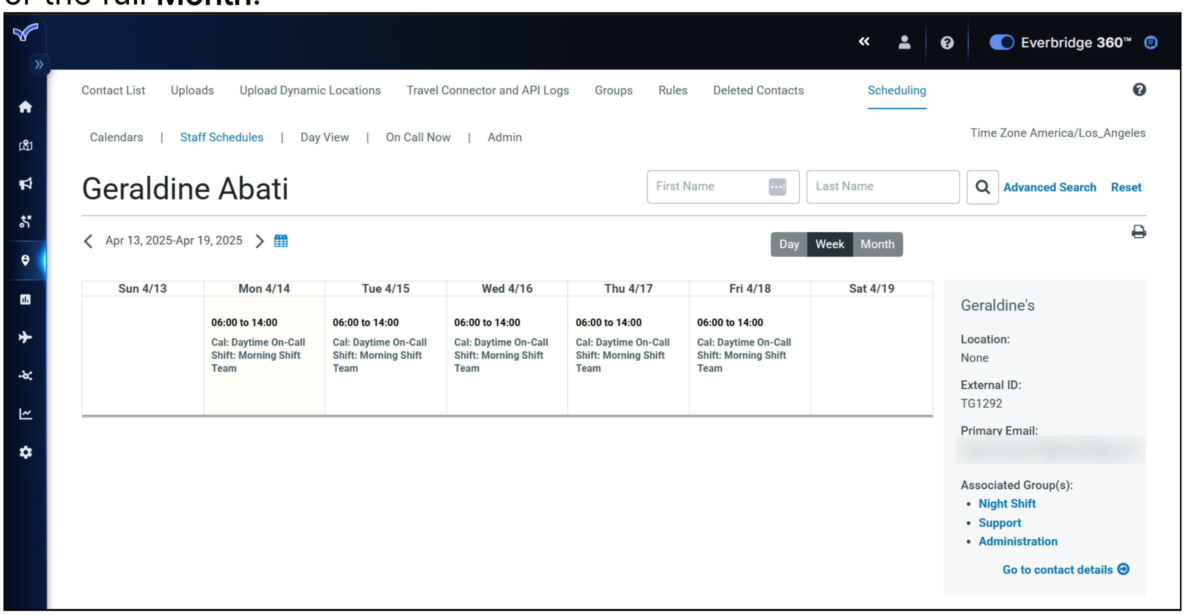
To see a staff member's schedule:

1. From the **Scheduling** subtab, in **Calendar** view, select **Staff Schedules** located above the Calendar name. The list of staff members from all Calendars is

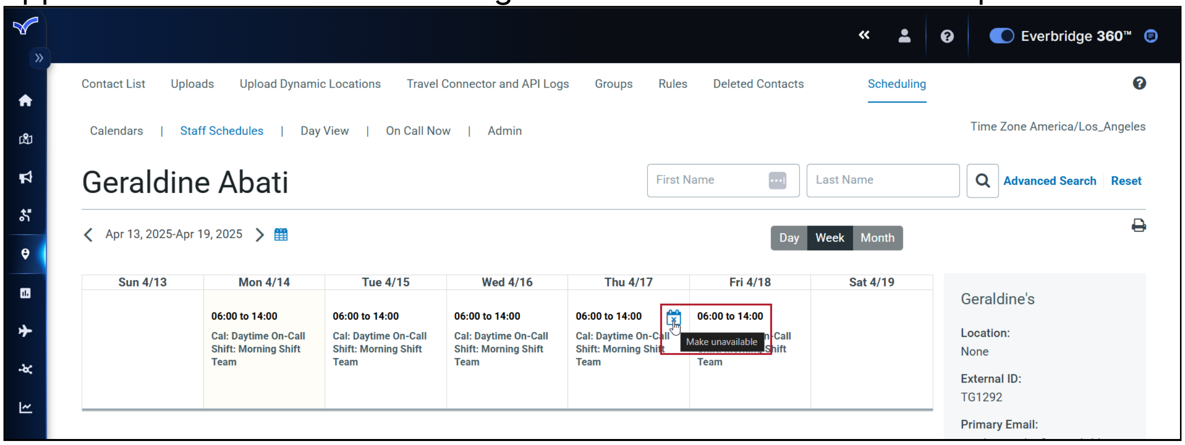
displayed.



2. Search by individual or group and select the name of the person whose schedule you want to see. You can see the schedule for the **Day**, the **Week**, or the full **Month**.



3. Optionally, hover the mouse over a time and click the **Calendar** icon that appears next to the date to change unavailable dates or add a replacement.



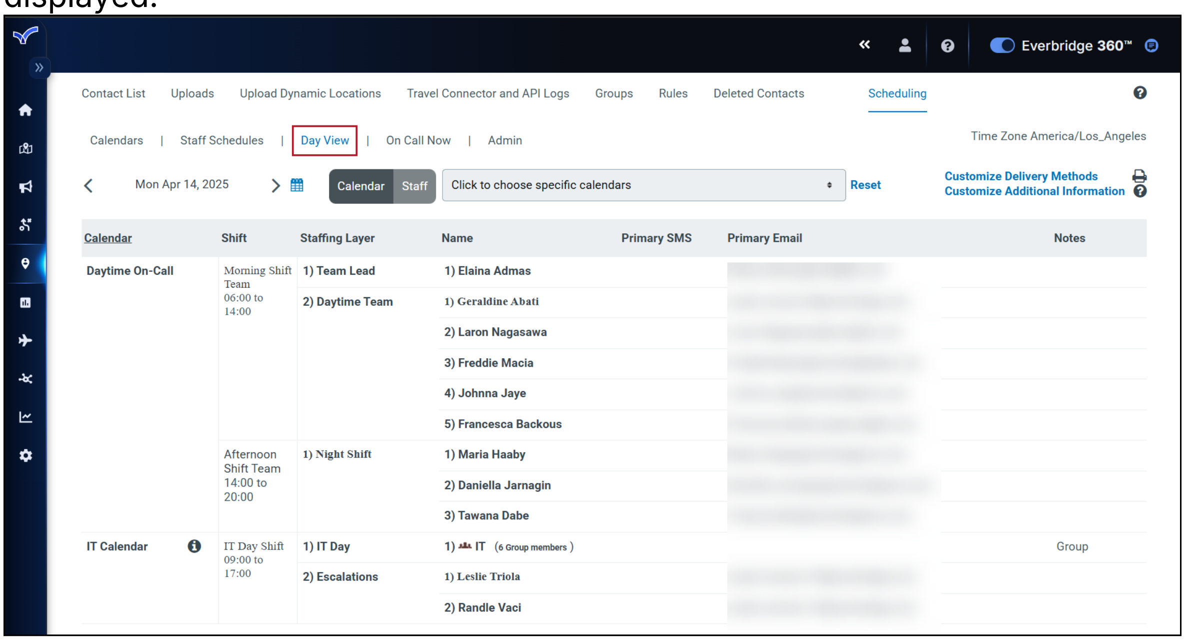
For more details, see Setting Unavailability.

Day View

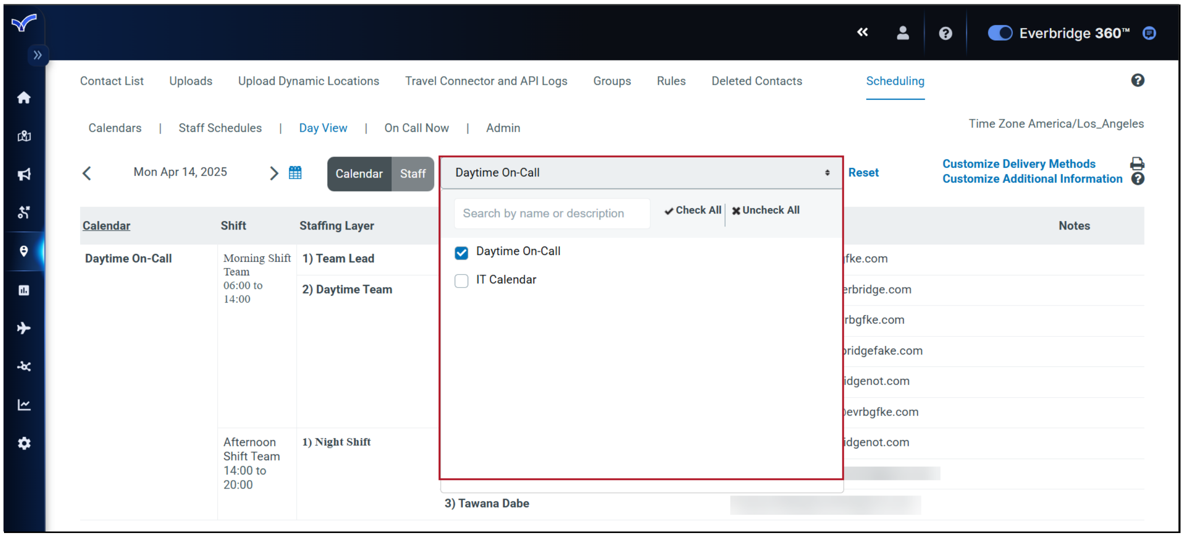
Day View shows all Calendars and their shifts/staff for the day. You can filter by Calendar or staff. Shifts will display in the user's time zone, not in the time zone of the shift.

To use Day View:

1. From the **Scheduling** subtab, in **Calendar View**, click **Day View** located above the Calendar name. The list of all active Calendars and their shifts/staff is displayed.



2. Select the desired Calendar(s) from the drop-down list to filter by Calendar.

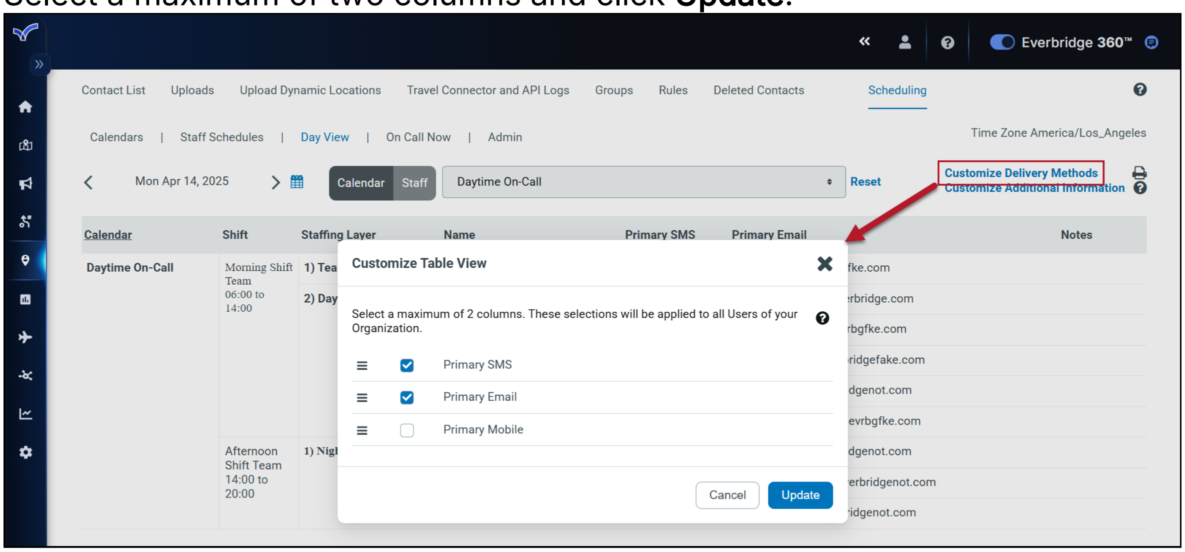


The columns next to a staff member's name can show two delivery methods. In this example, two email address delivery methods are shown. If there is an information icon to the right of the Calendar name, hover the mouse over the icon to see the Calendar description.

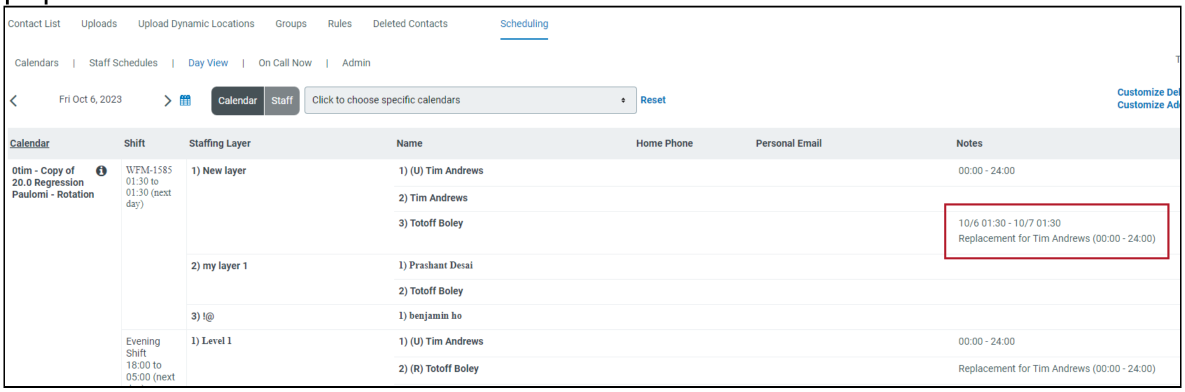
3. Click **Customize Delivery Methods** to select up to two different contact delivery methods.

> **NOTE:** Fax, TTY, and Mobile Push delivery methods are not supported.

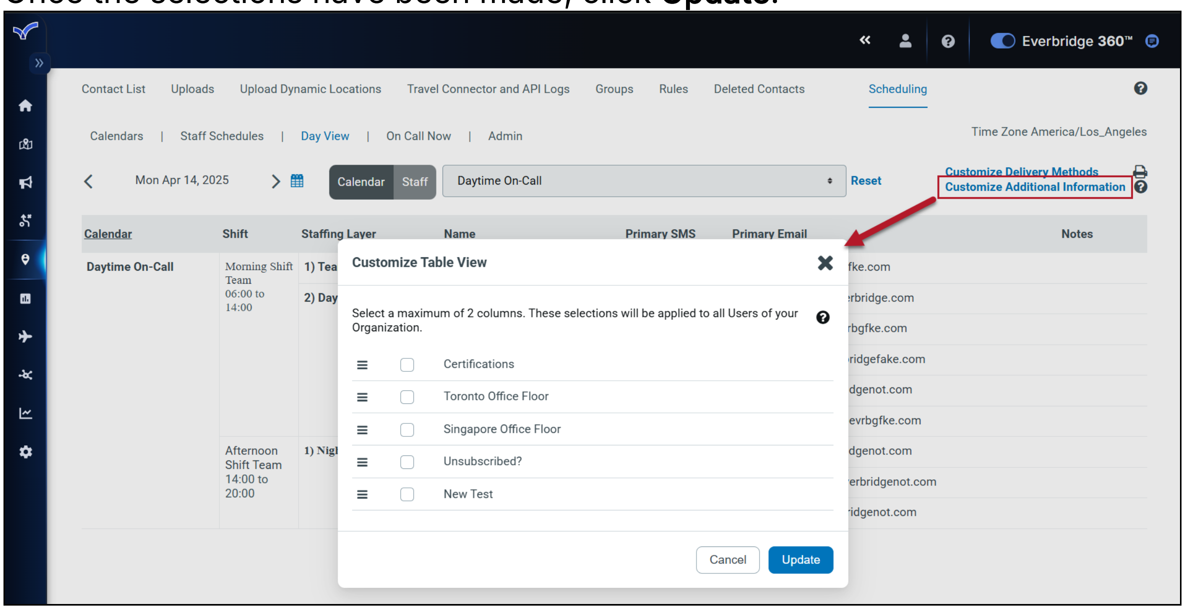
4. Select a maximum of two columns and click **Update**.



These selections are only applied to your view. If there are replacements, the time of the unavailability and replacement employee will automatically populate in the **Notes** column.



5. Click **Customize Additional Information** to select up to two different Additional Information contact attributes.
6. Once the selections have been made, click **Update**.



These attributes will be displayed after the Delivery Methods attributes in the tabular format in the **Day View** and **On Call Now** tabs.

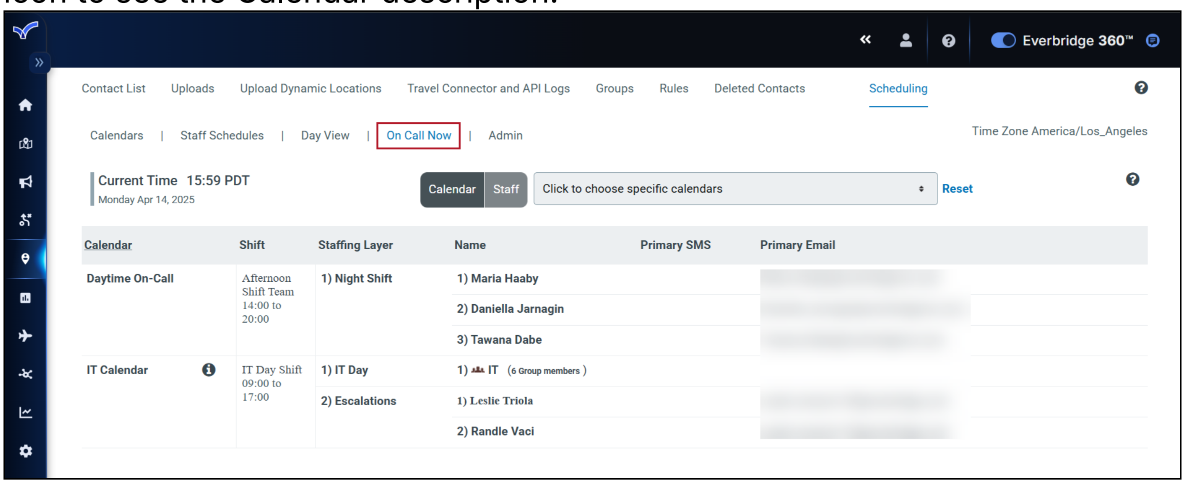
7. Optionally, click the link next to the Group name to see the members' names. (Click the link again to collapse the group name list.)
8. Optionally, click a group name to see the staff schedule and members of the group.
9. Optionally, click the following to:
   - **Print icon** - prints the Calendar currently displayed. You can expand all groups before printing to see the group members' names in addition to the group names.
   - **Calendar name** - returns you to the Calendar view.
   - **Staffing Layer**-opens that staffing layer, where you can edit the layer and/or add staff.
   - **Staff name** - displays that individual's schedule.

On Call Now

On Call Now shows all active Calendars and shifts/staff who are currently on-call. You can filter by Calendar or staff. Shifts will display in the user's time zone, not in the time zone of the shift.

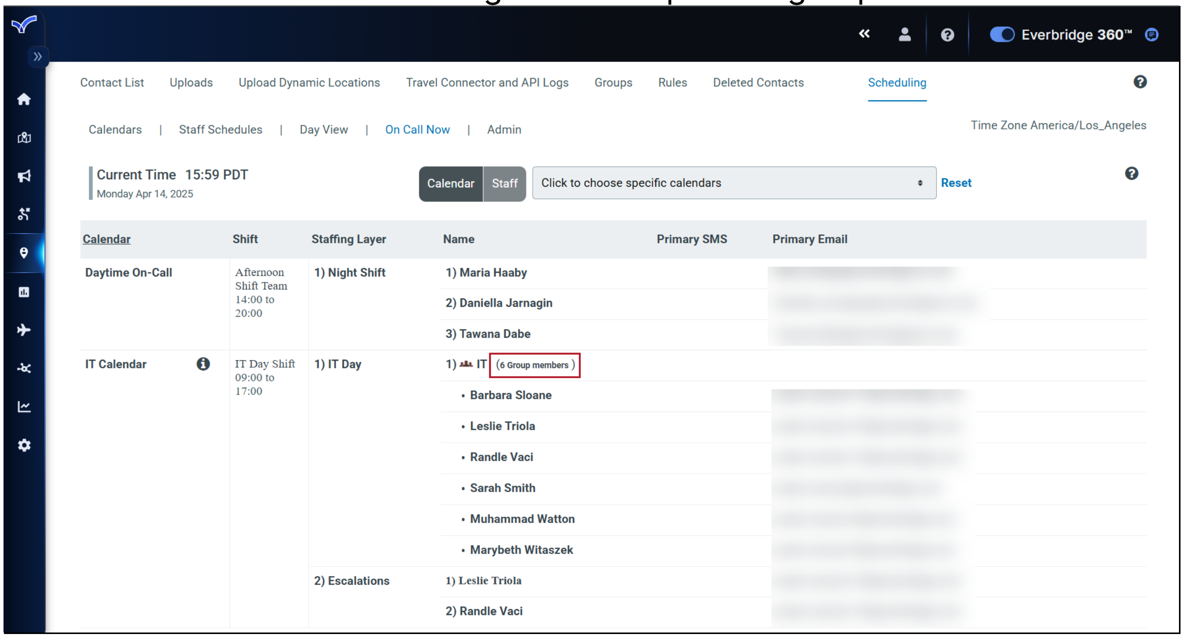
To use On Call Now:

1. From the **Scheduling** subtab, select **On Call Now**. The list of all active Calendars and their shifts/staff who are on call now is displayed. If there is an information icon to the right of the Calendar name, hover the mouse over the icon to see the Calendar description.

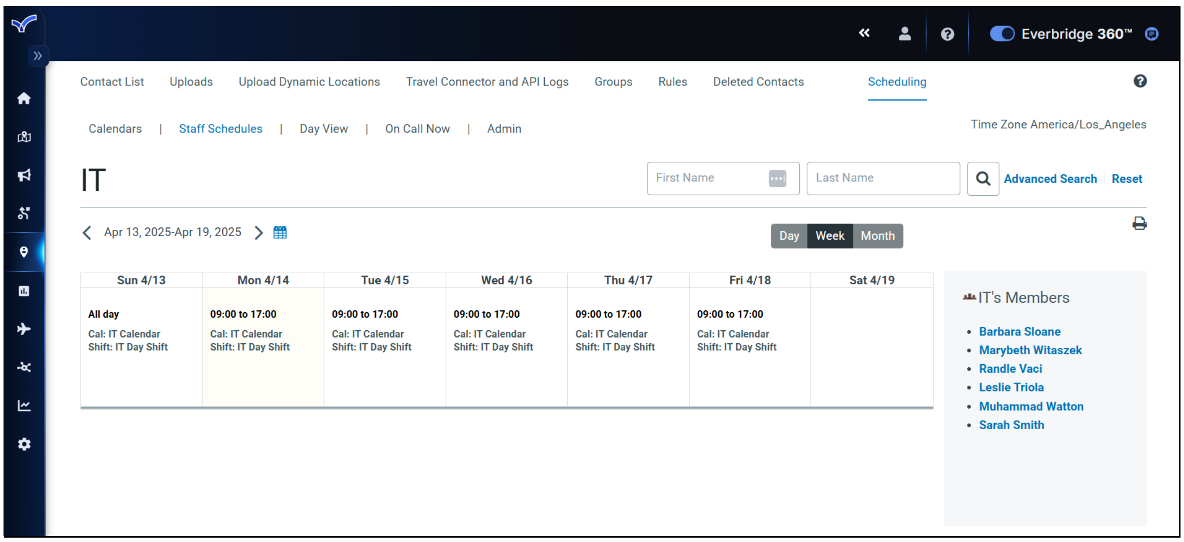


2. To filter by Calendar, select the desired Calendar(s) from the drop-down list.
3. As needed, select more than one Calendar.

4. Optionally, from **On Call Now**, click the number of group members to see their names. Click the number again to collapse the group name list.



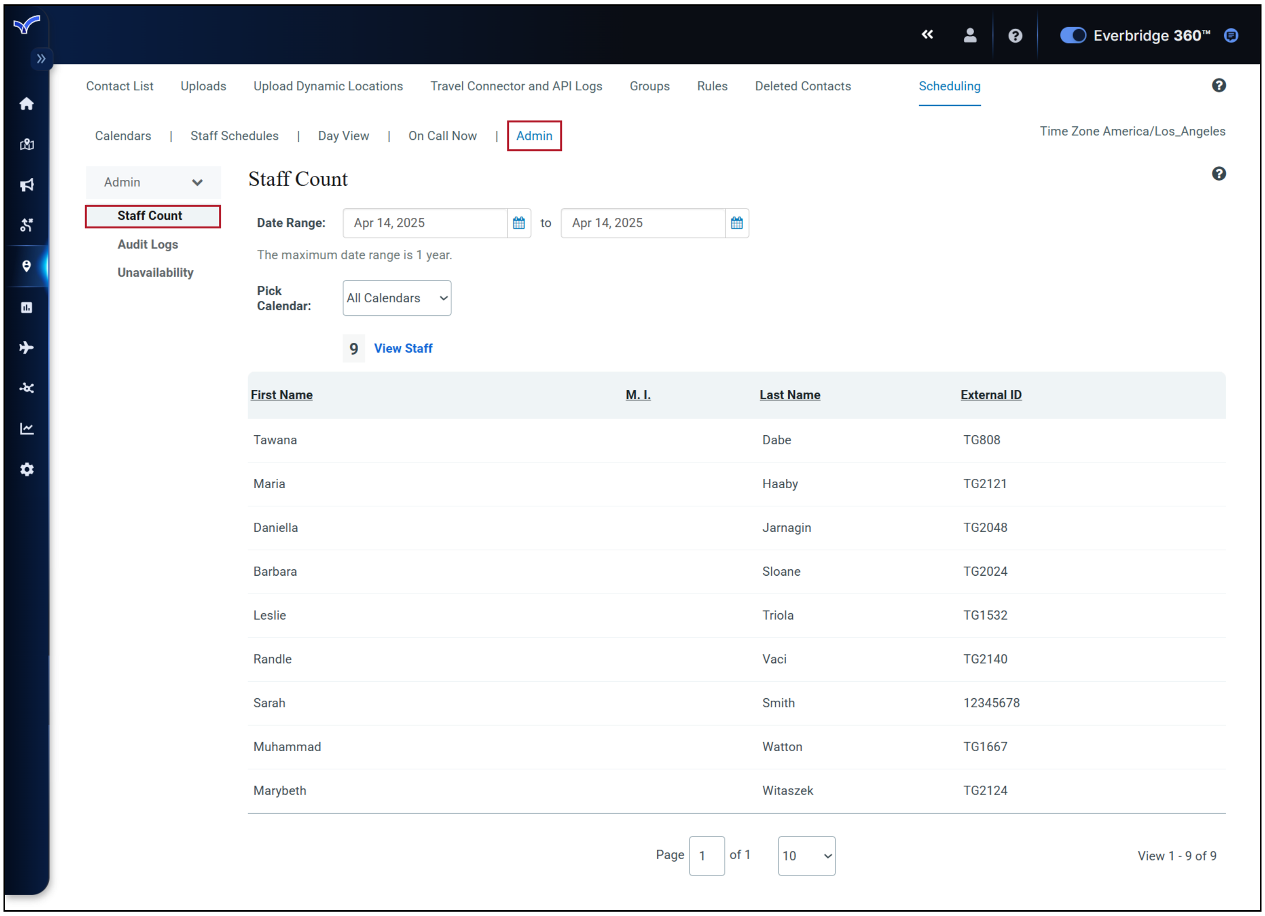
5. Optionally, from **On Call Now**, click a group name to see the current staff schedule.



6. Optionally, click the following to:
   - **Print icon** - Prints the Calendar currently displayed. You can expand all groups before printing to see the group members' names in addition to the group names.
   - **Calendar name** - Returns you to the Calendar view.
   - **Staffing Layer** - Opens that staffing layer, where you can edit the layer and/or add staff.
   - **Staff name** - Displays that individual's schedule.

Staff Count

You can see the staff count for one or all Calendars. Select a date range and then optionally select a Calendar if you do not want to see the staff count for all Calendars or a specific Calendar of your choice.



Editing a Schedule (Calendar, Shift, or Staff)

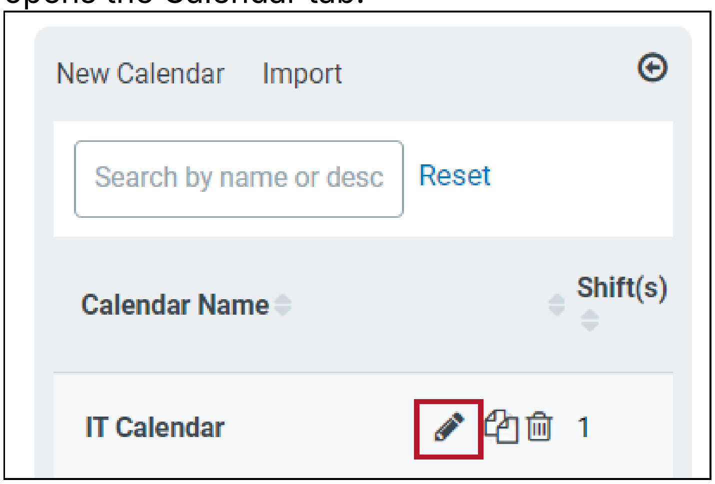
Schedules can be edited from different places in the Scheduling page, when selecting an action, it always opens the Edit wizard. Depending on what is edited (Calendar, Shift, or Staff), you are directed to different steps of the wizard.

Once the wizard is open, you can navigate directly to the shift or staffing tabs by selecting each tab. If there are no shifts in a Calendar, the staffing tab is inactive.

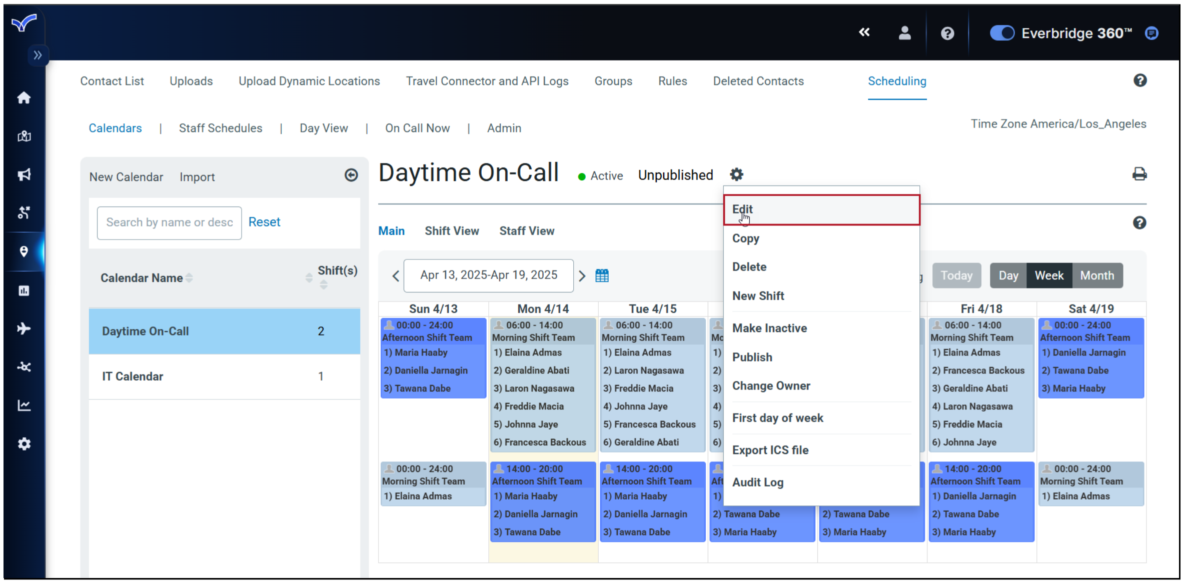
Edit Calendar

You can edit a Calendar from the following places in the Calendar view:

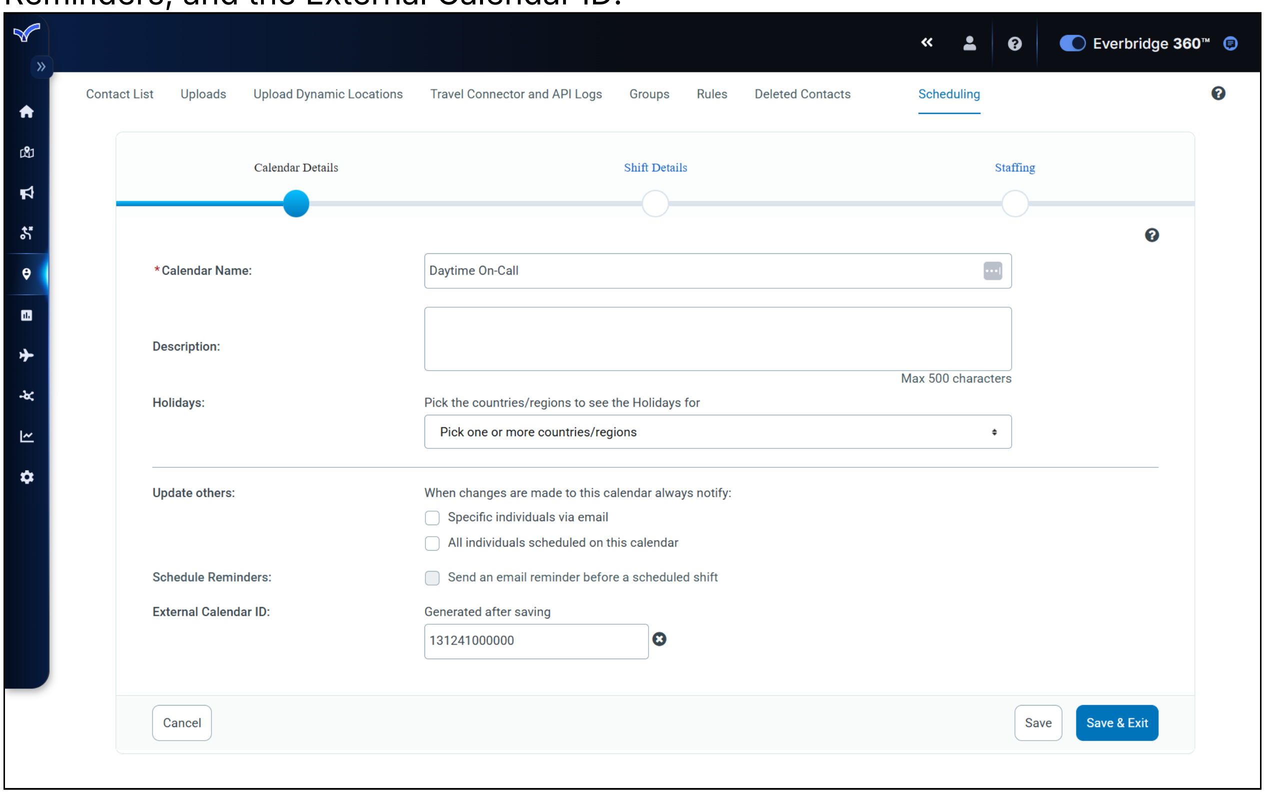
- From the Calendar list, hover the mouse over the Calendar and select **Edit**. It opens the Calendar tab.



- Select a Calendar and select **Edit** in the action list.



Editing a Calendar navigates you to the Calendar page of the wizard. Here, you can change the Name, Description, Holidays, Update Other settings, Schedule Reminders, and the External Calendar ID.

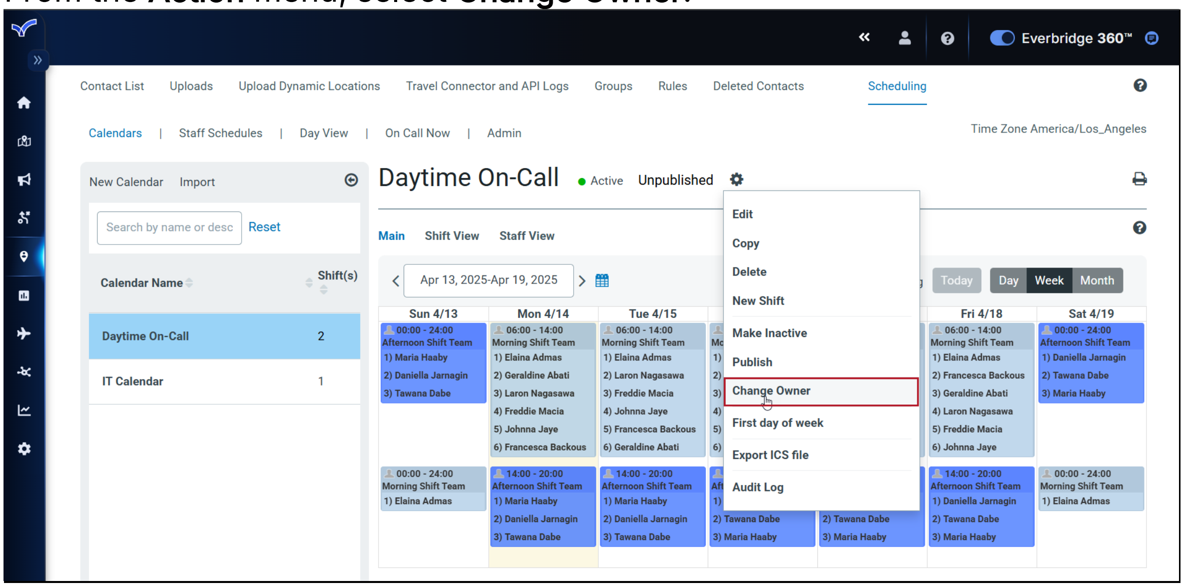


Change Calendar Owner

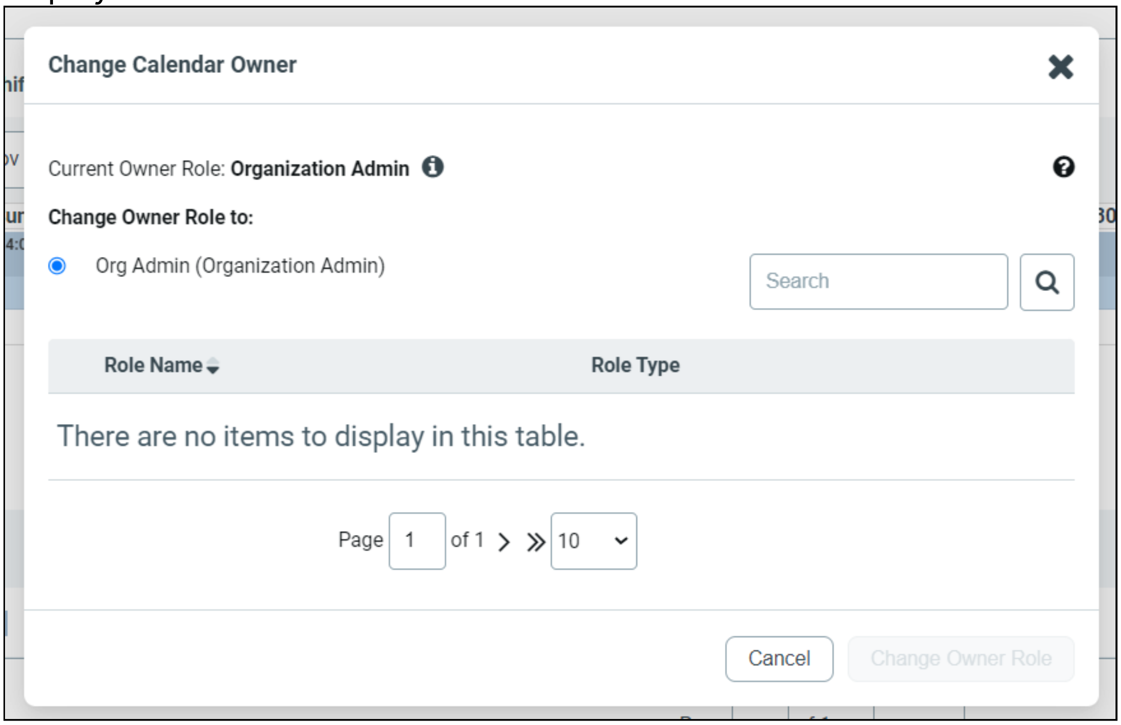
By default, the Calendar is owned by the user who created the Calendar. Only a Group Manager or Organization Administrator can own a Calendar.

To change Calendar owner:

1. From the **Scheduling** subtab, ensure that the desired Calendar Name in the left-hand pane is selected.
2. From the **Action** menu, select **Change Owner**.



The Change Calendar Owner dialog is displayed. The current owner role is displayed.



3. Select the radio button corresponding to the owner role you want.
4. Click **Change Owner Role**. An email notification is sent to your Calendar distribution list.

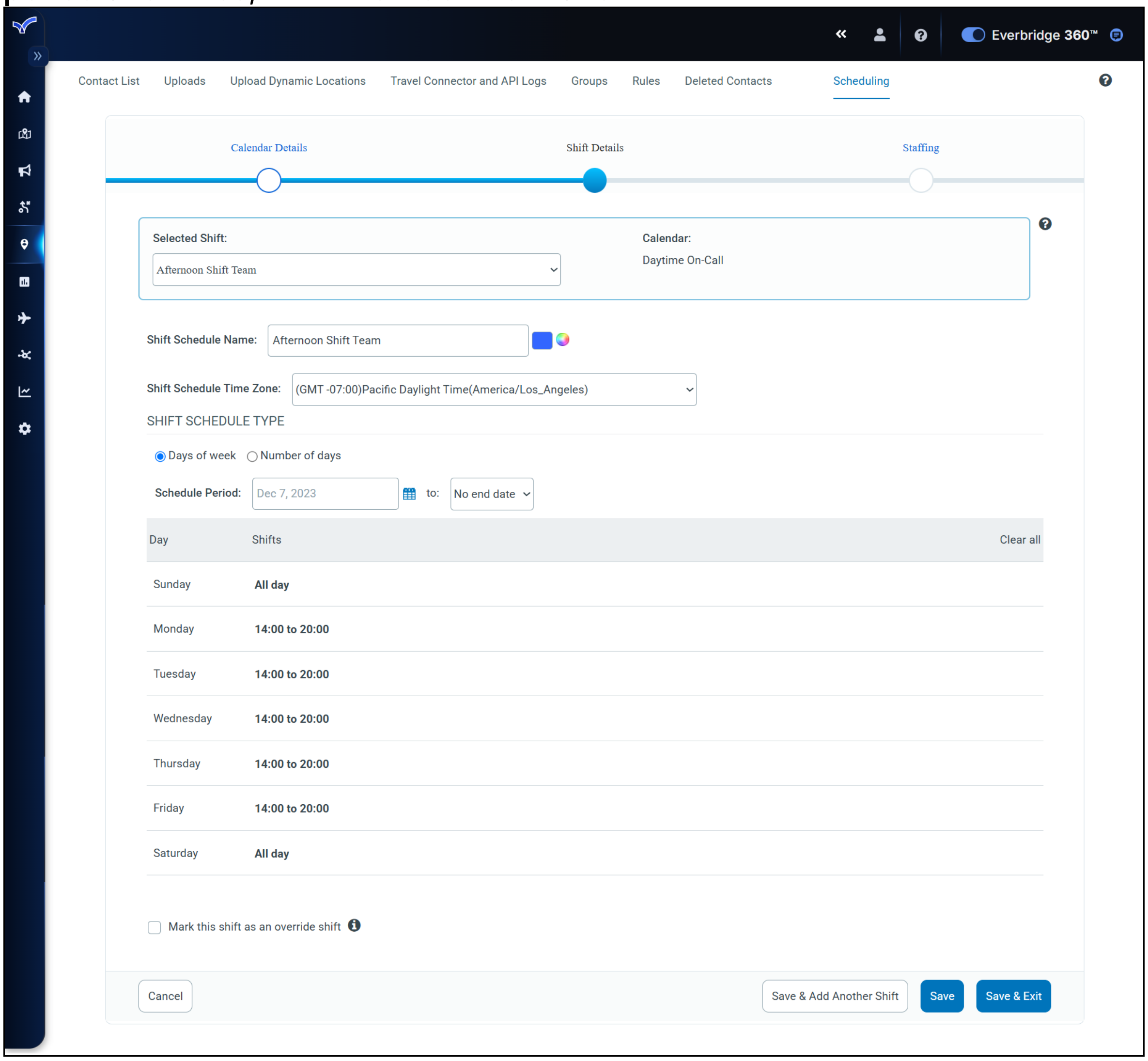
Edit Shifts Schedule

You can edit a shift schedule or add a shift for a Calendar from the following places in the **Calendar** > **Main View**:

- **Create a shift in an existing Calendar:** Select the **Add Shift** action on the top of the shift table. It launches the wizard and sets the wizard to the **Shift Details** tab for the specific Calendar.
- **Create a shift in an existing Calendar:** Select the **Add Shift** action from the Calendar action list. It launches the wizard and sets the wizard to the **Shift Details** tab for the specific Calendar.
- **Edit an existing shift:** Select the shift hyperlink in the shift table. It launches the wizard, opens the **Shift Details** tab, and displays the selected shift schedule.
- **Edit an existing shift:** Hover the mouse over a shift in the Calendar view and select **Edit Shift Schedule**. It launches the wizard, opens the **Shift Details** tab, and displays the selected shift schedule.

To edit a shift schedule:

1. Select the shift you want to edit. The **Shift Details** tab of the wizard is displayed.
2. Change the following information: **Name, Shift Schedule type, Shift schedule period and times**, and **Override information**.



3. Click **Save & Add Another Shift**, **Save**, or **Save & Exit**.

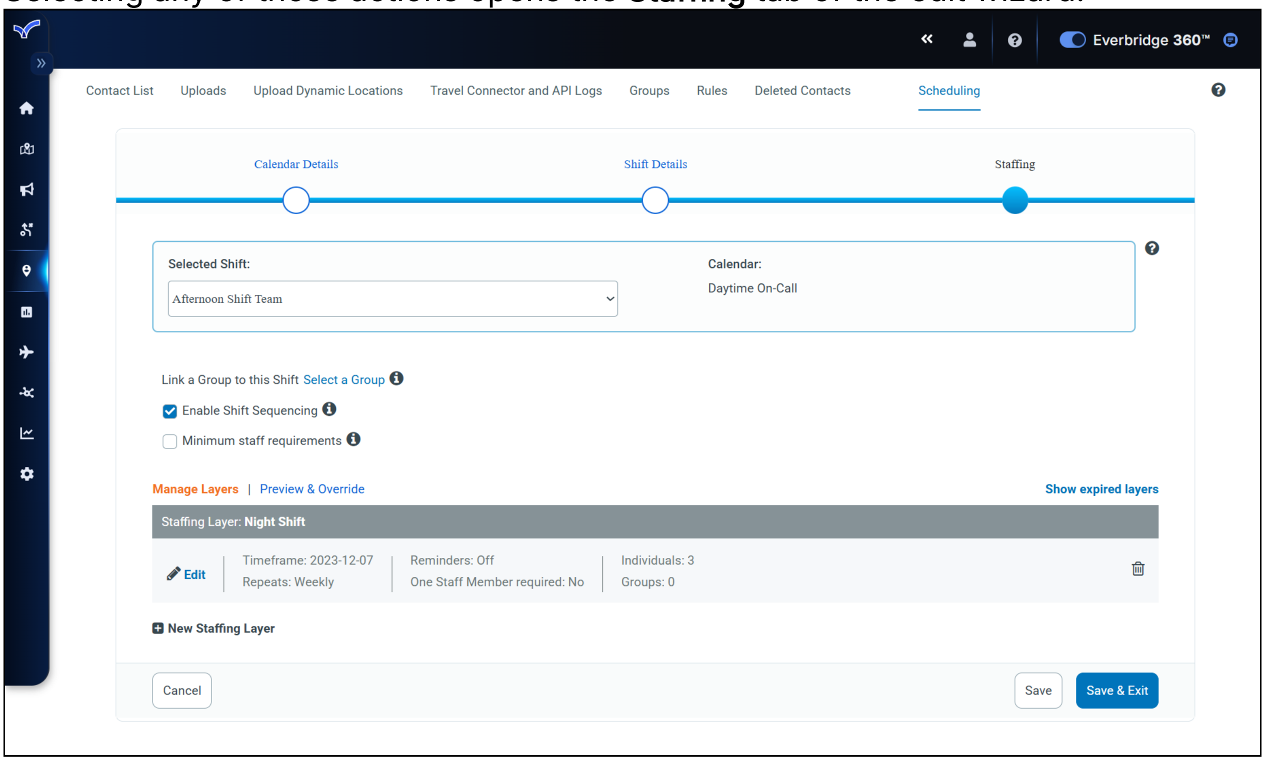
Edit Shift Staffing

You can edit shift staffing from the following places:

- In the **Calendar > Main** view, select the **Edit Staffing** link in the shift table, which launches the wizard and opens the Staffing tab on the selected shift.
- In the **Calendar > Main** view, hover the mouse over the shift, select the **Edit Staffing** link in the shift table, which launches the wizard and opens the Staffing tab on the selected shift.

- In the **Shift View** for a specific shift, select the **Staffing** action, which launches the wizard and opens the **Staffing** tab on the selected shift.
- In the **Shift** view, to clear all staff from a shift, select the **Clear All Staff** action for a specific shift. This action removes all the staff from the specific shift for the specific Calendar.
- In the **Staff View** for a specific staff member, select **Scheduling**, then in the **Manage Staff Schedule** window, select the Pencil icon, which launches the wizard and opens the **Staffing** tab on the selected shift.
- In the **Staff View**, to clear staff from all the shifts, for a specific staff member, select **Clear from all Shifts**, which removes the staff from all the shifts (including override) for the specific Calendar.

Selecting any of those actions opens the **Staffing** tab of the edit wizard.



From the **Staffing** tab, you can:

- Change the shift staffing options
- Add / Delete layers
- Edit layers
- Change layer sequencing options (Advanced Escalation and Scheduling mode only)
- Add / Remove staff from a layer
- Reorder layer sequence.
- Set the escalation time to the next layer (Advanced Escalation and Scheduling mode only)
- Preview the schedule

- Set overrides

Reuse a Staffing Layer

You can use the same Staffing layer name for multiple layers as long as the schedule does not override. This can be used when you want to define different staff for a different time period for the same layer.

To reuse a staffing layer name:

1. Select **Edit Staffing** from one of the entry points listed above. The **Staffing** tab is opened.
2. Select **New Staffing Layer**.
3. In the **Staffing Layer Name** field, make sure to select the same Staffing Layer name of an existing layer.
4. Enter your **From** and **To** dates.

   > **NOTE:** Staffing layers with the name cannot overlap with each other.

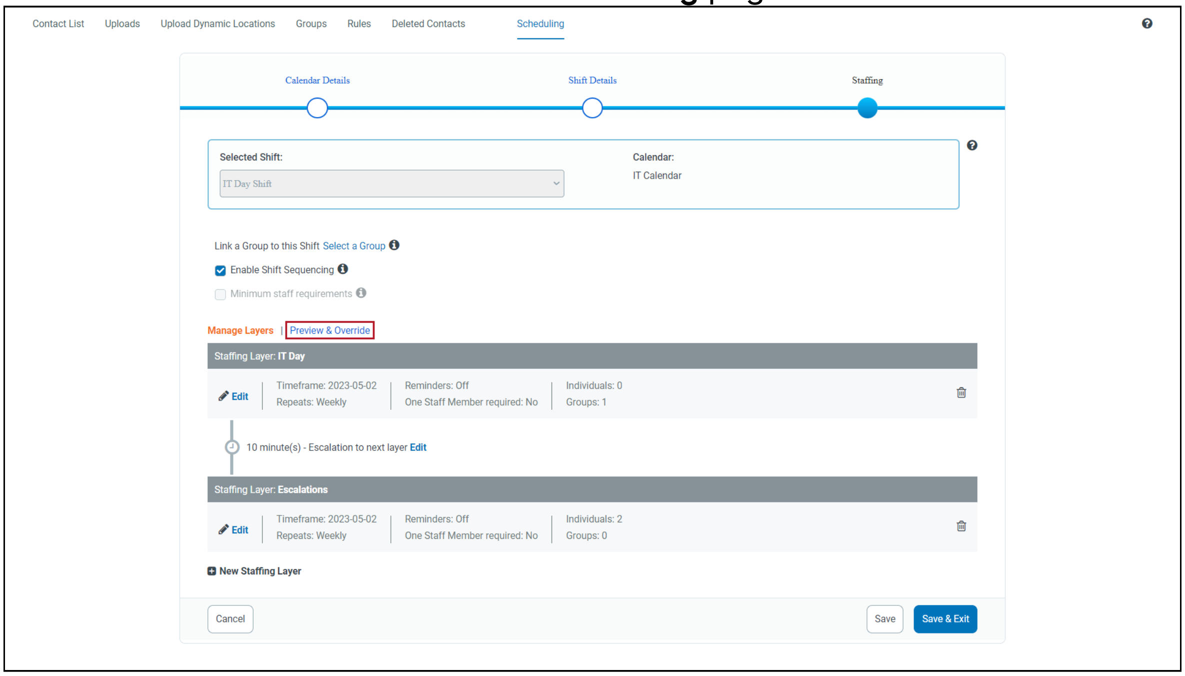
5. Select your staff and click **Save**.

Overriding Staff for a Shift (Shift Substitution)

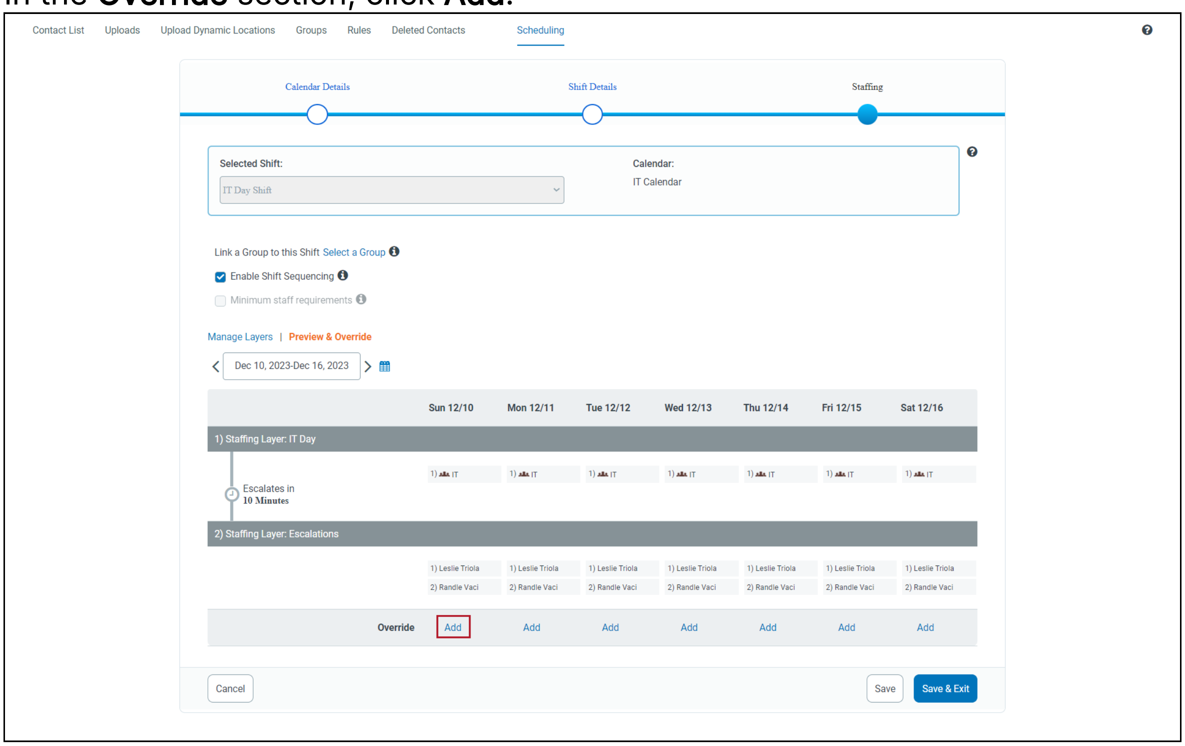
Within a specific shift, for a specific day, the Administrator can choose to override all the staff members.

To override staff for a shift:

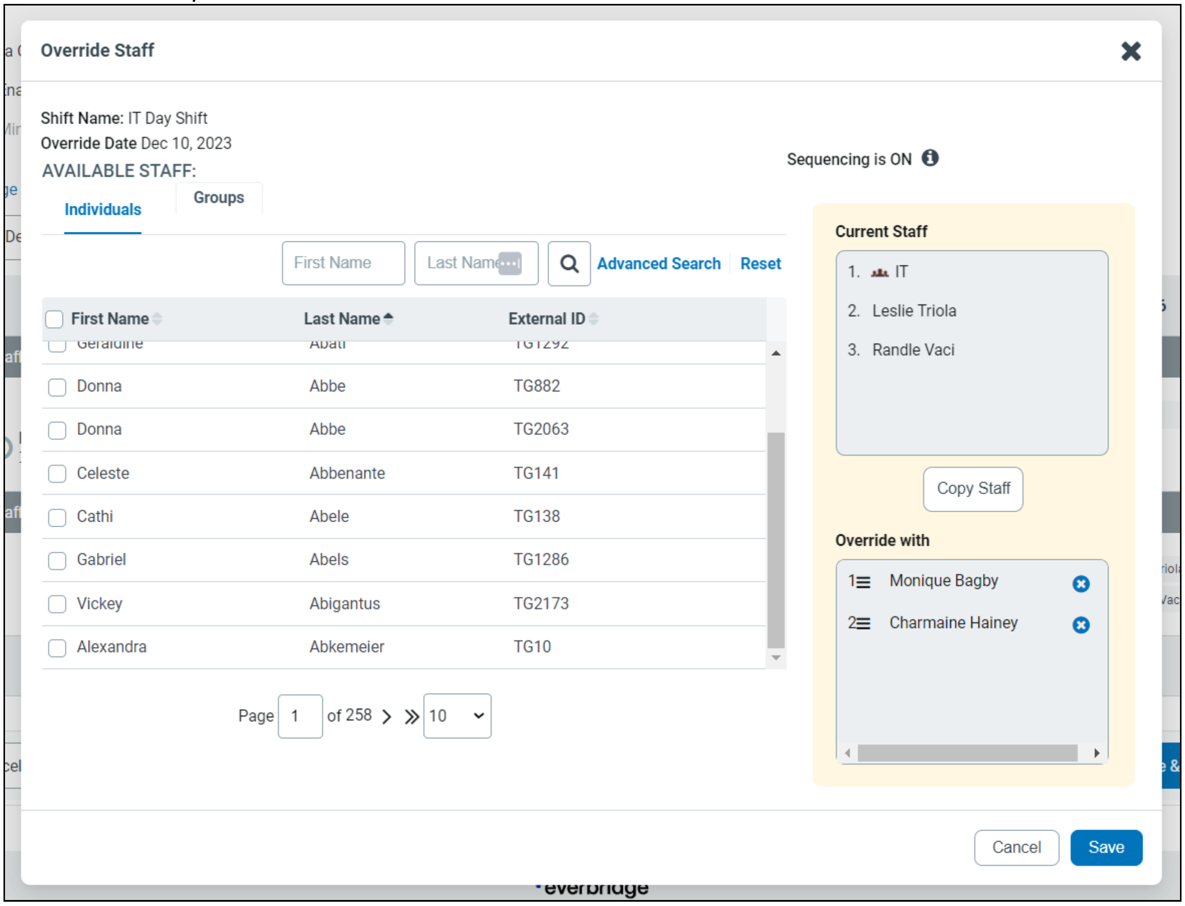
1. Select **Preview and Override** from the **Staffing** page.



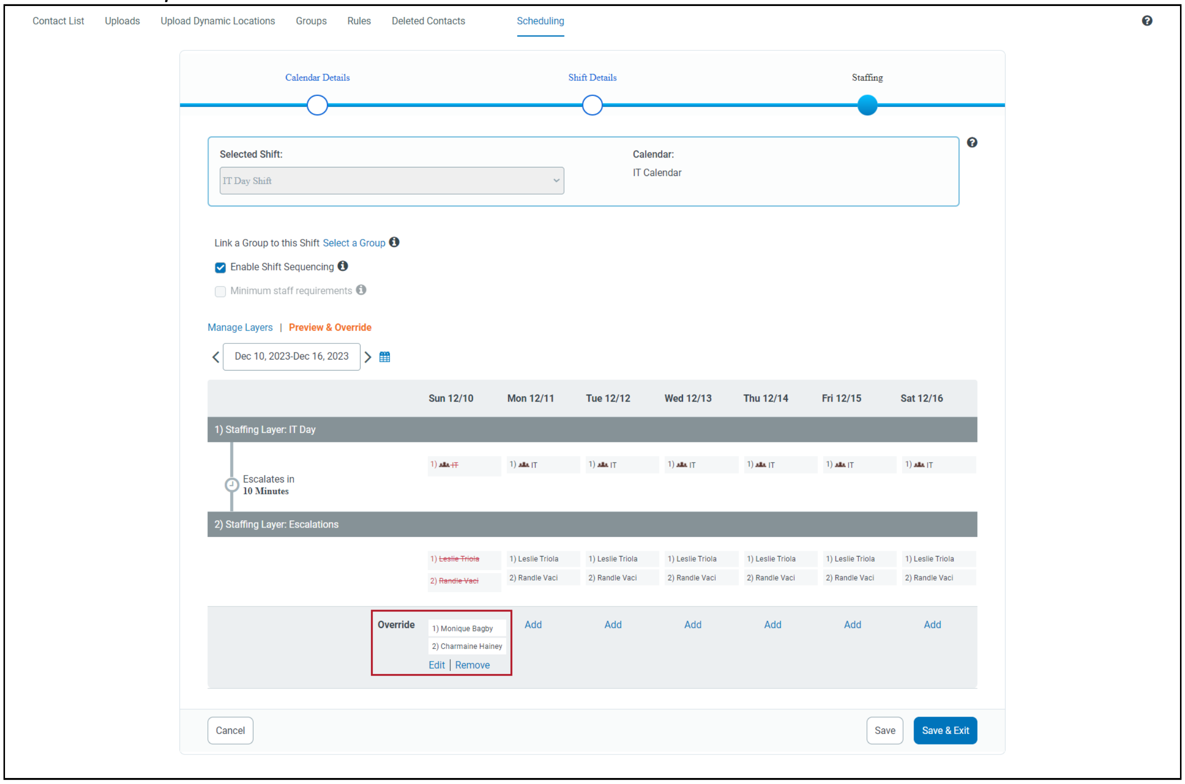
2. In the **Override** section, click **Add**.



3. Select the checkbox of the name(s) with whom you want to override the current staff, and click **Save**.



4. As a result, the on-call staff will be the ones defined in the override.



- If the shift is sequenced, the on-call contacts defined in the override are notified in the order of the sequence. There is no possibility to turn off the sequence.
- If the shift is not sequenced, the on-call contacts are all notified at the same time.

When advanced scheduling is turned on, for sequenced shift:

- For that specific day, the predefined layers do not exist any longer.
- The escalation between staff is taken from the sequencing wait time as defined in the Incident/Notification template.

NOTE: If a shift is not sequenced, on the day of the override, all contacts are notified at the same time.

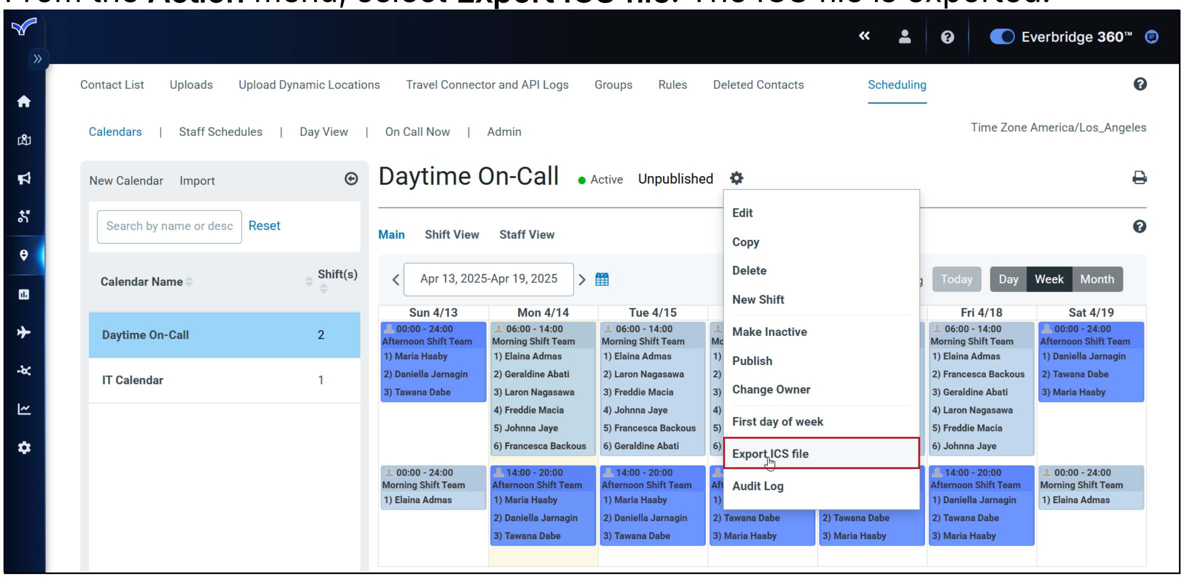
To remove the overrides, select **Remove** from the desired date on the Staffing Layers dialog.

Exporting a Calendar

You can export a Calendar into a .ics format. Export creates an iCal in ICS format that you can later import into Microsoft Outlook or Google Calendar.

To export a Calendar:

1. From the **Scheduling** subtab, ensure that the desired Calendar Name in the left-hand pane is selected.
2. From the **Action** menu, select **Export ICS file**. The ICS file is exported.



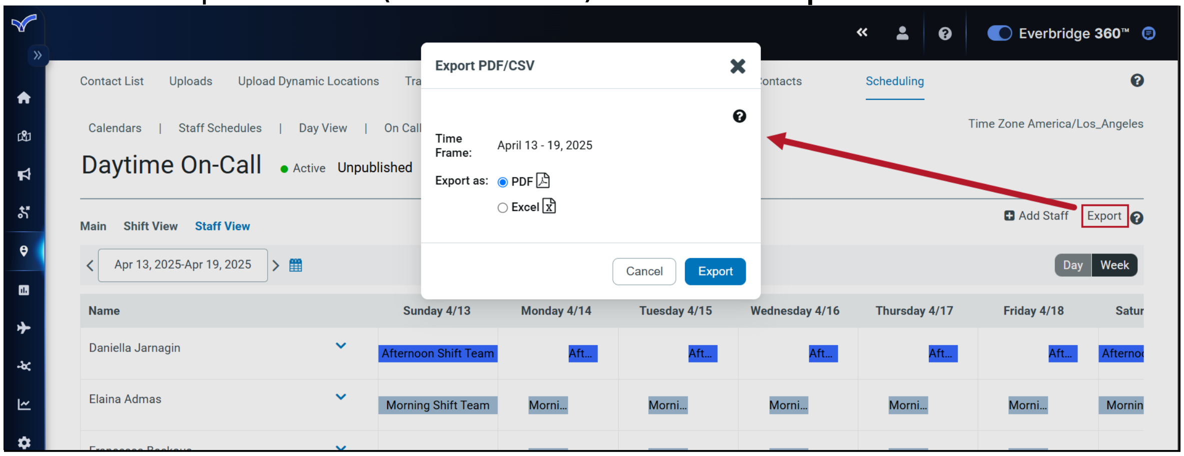
3. Import your ICS file according to your Help documentation from the respective Calendars (Microsoft Outlook or Google Calendar).
   - The file will be imported to your calendar according to your calendar's time zone regardless of the shift time zone.

Exporting the Staff View

To export the staff view in a PDF or CSV format:

1. From the **Scheduling** subtab, select the **Staff View** link.
2. Select the week you want to report.
3. Select **Export**.

4. Select the export format (PDF or Excel) and select **Export**.

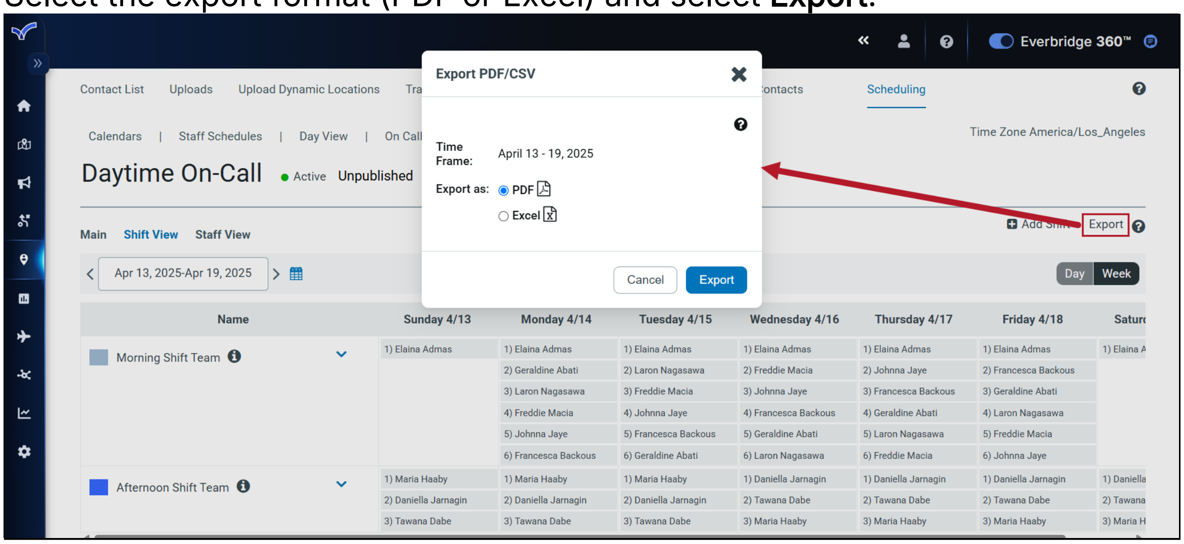


The exported file includes each staff member, and the list of shifts for each day is displayed in the selected time range. Shifts will be exported in the user's time zone rather than in the shift's time zone.

Exporting the Shift View

To export the shift view in a PDF or CSV format:

1. From the **Scheduling** subtab, select the **Shift View** link.
2. Select the week you want to report.
3. Select **Export**.
4. Select the export format (PDF or Excel) and select **Export**.



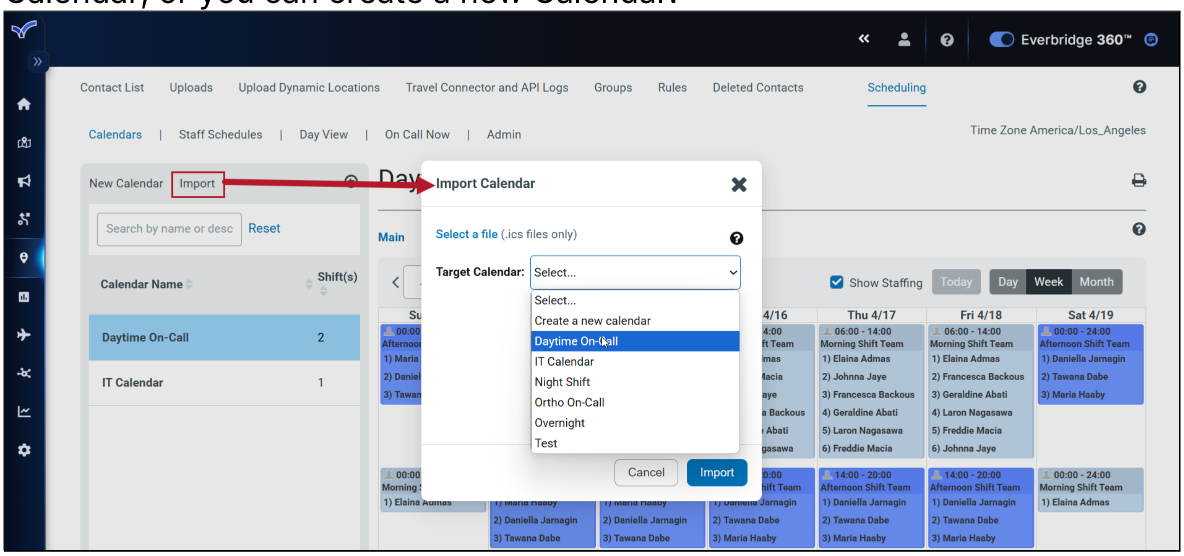
The exported file includes for each shift the list of staff members and their replacements for each day displayed in the selected time range. Shifts will be exported in the user's time zone rather than in the shift's time zone.

Importing a Calendar

You can import your .ics Calendar files to your Calendars in Scheduling. Only .ics files are supported from Microsoft Outlook and Google Calendar. For details about creating .ics files, see your Help documentation from the respective Calendars.

To import a Calendar:

1. From the **Calendars** page, click the **Import** link. The Import Calendar dialog is displayed.
2. Click the **Select a file** link.
3. Choose your .ics file and click **Open**.
4. Select the Target Calendar from the drop-down list. It can be an existing Calendar, or you can create a new Calendar.



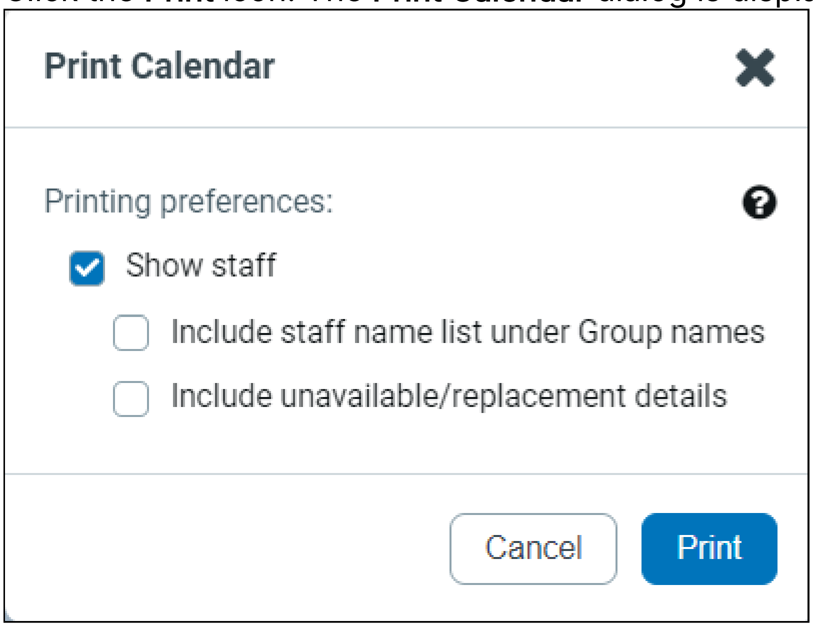
5. Click **Import**.

Print a Calendar

A calendar can be printed from the **Main Calendar View**. When printed, the calendar will reflect the user's time zone instead of the shift's time zone.

To print a Calendar:

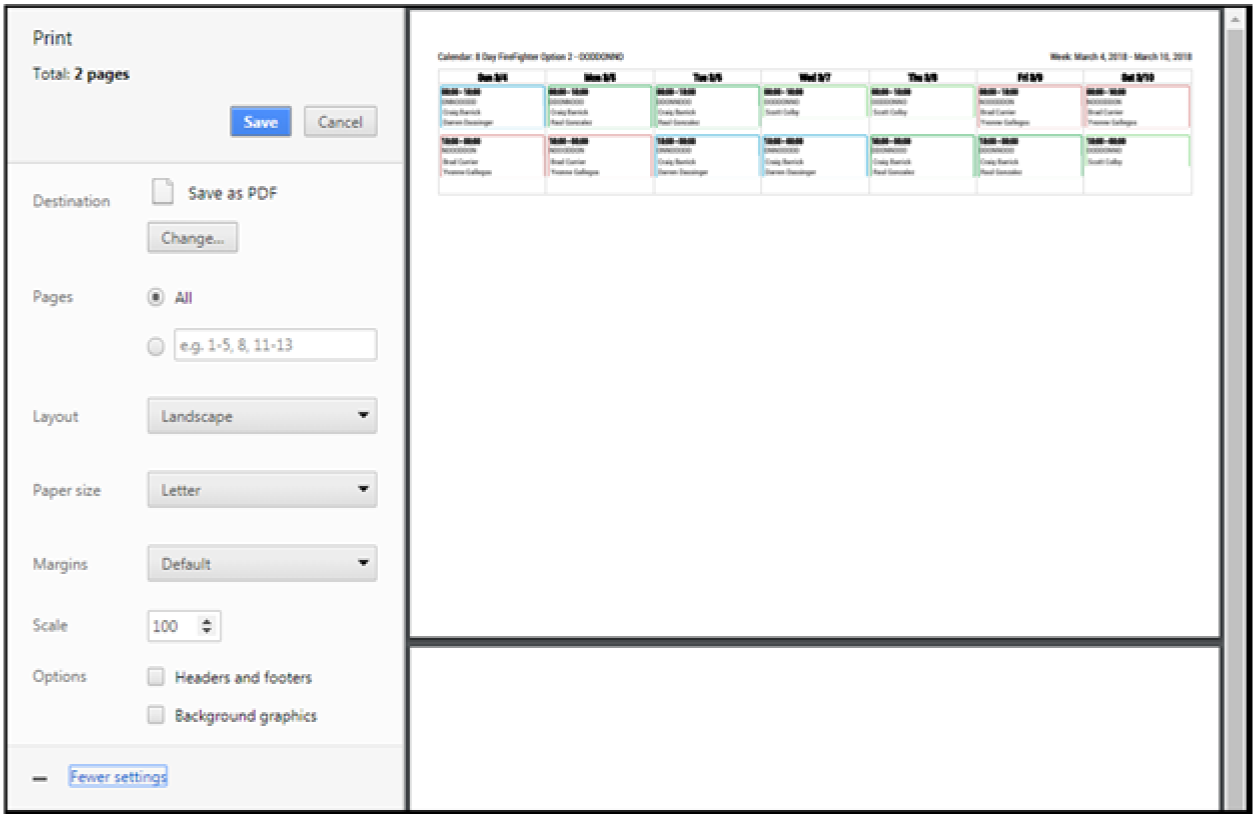
1. From the **Scheduling** subtab, select the desired Calendar Name in the left-hand pane.
2. Click the **Print** icon. The **Print Calendar** dialog is displayed.



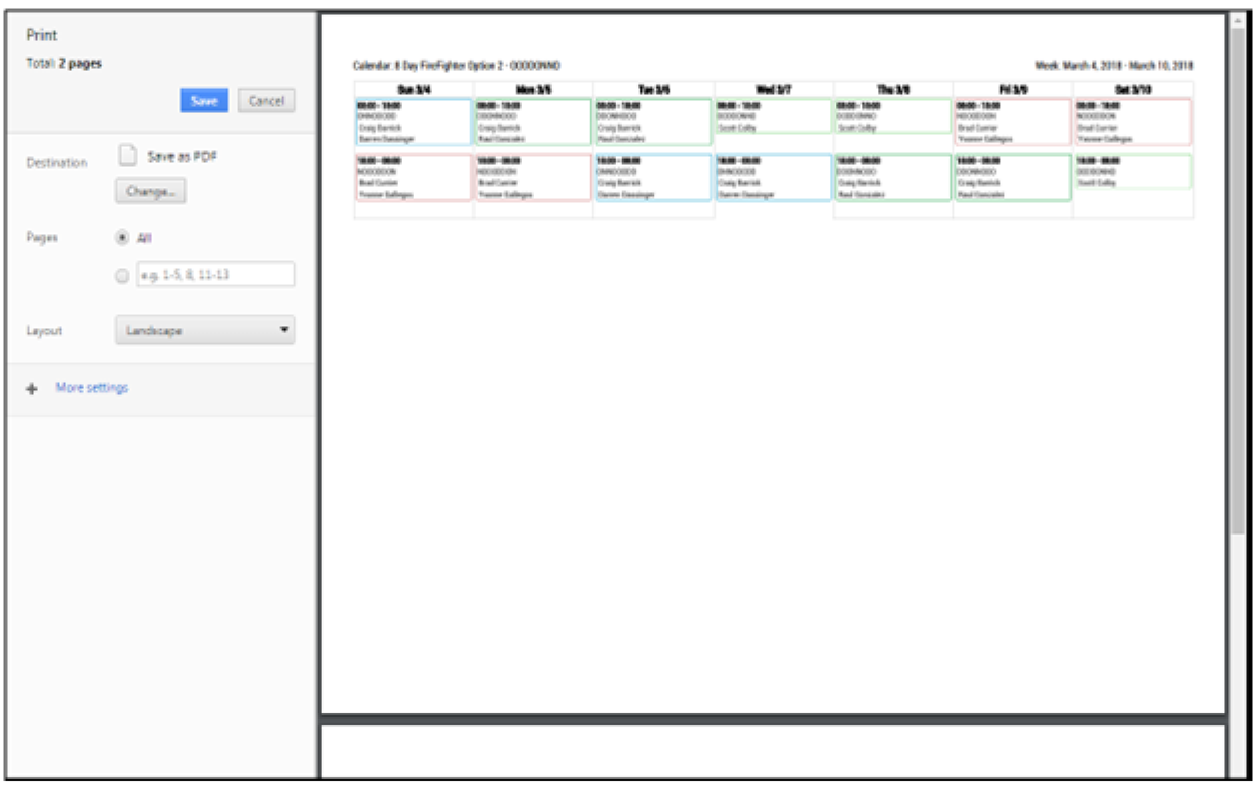
3. Optionally, select one or both checkboxes:
   - **Include staff name list under Group names**
   - **Include unavailable/replacement details**
4. Click **Print**. The document is put together depending on your options, then is displayed in a Print dialog. See Example Calendars Using the Print Icon, next.
5. Optionally, change the Layout, Paper size, Margins, and other print options.
6. Click **Save** to save the Calendar as a PDF file if you want to keep the printed Calendar. The **Save As** dialog is displayed.
7. Type a new filename and place the PDF on your computer.
8. Print your PDF as you normally would.

Examples of Print Formats

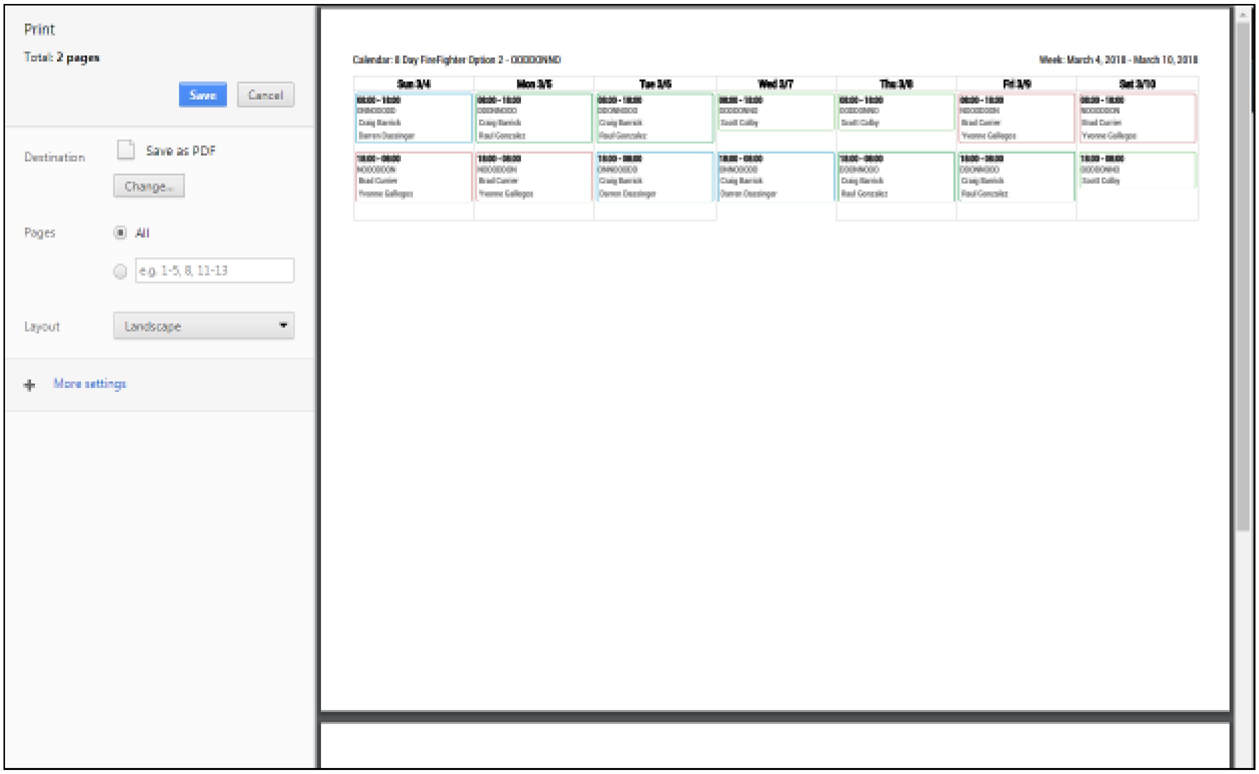
Show staff:



Show Staff and include staff name list under group names



Show staff and include unavailable/replacement details


Print
Total: 2 pages
Save
Cancel
Destination
Save as PDF
Change...
Pages
All
e.g. 1-5, 8, 11-13
Layout
Landscape
More settings

Setting Unavailability

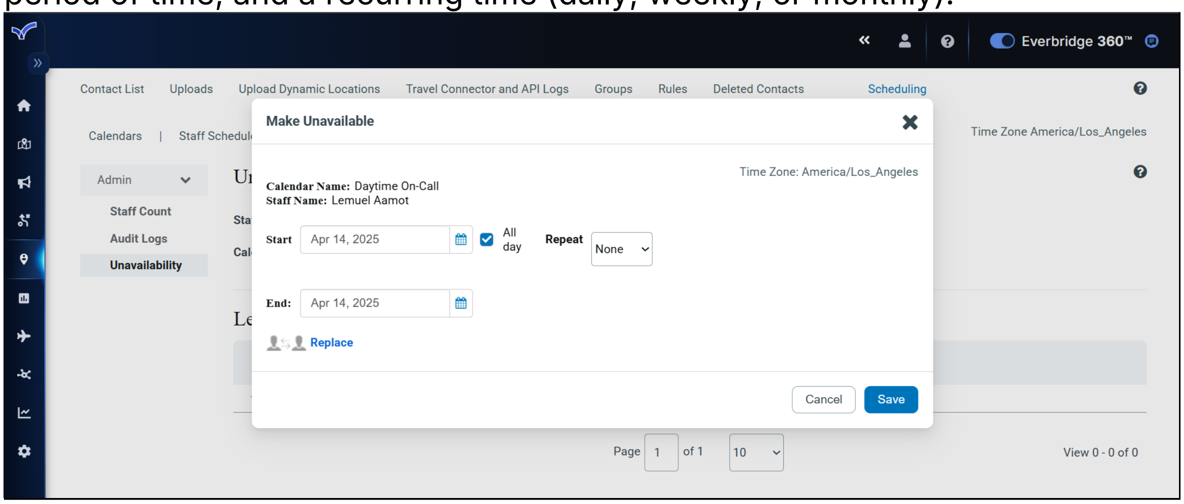
Administrators can manage unavailability and replacement for staff in the Calendar.

You can set an unavailability for a specific Calendar or all Calendars.

- When setting an unavailability for a specific Calendar, the unavailability and replacement apply to all shifts and layers within the Calendar where the contact is staffed.
- When setting an unavailability for All Calendars, the unavailability and replacement apply to all Calendars, shifts, and layers within the organization where the contact is staffed. If the contact is staffed in a new Calendar, that contact will automatically be unavailable.

To make a contact unavailable:

1. Navigate to **Contacts** > **Scheduling** and select **Unavailability** under the **Admin** tab.
2. Select a contact and select either a Calendar in the drop-down menu or All Calendars.
3. Select **Add Unavailability** next to the contact name.
4. In the **Make Unavailable** dialog, select the **Start** and **End** dates, if all day or a period of time, and a recurring time (daily, weekly, or monthly).



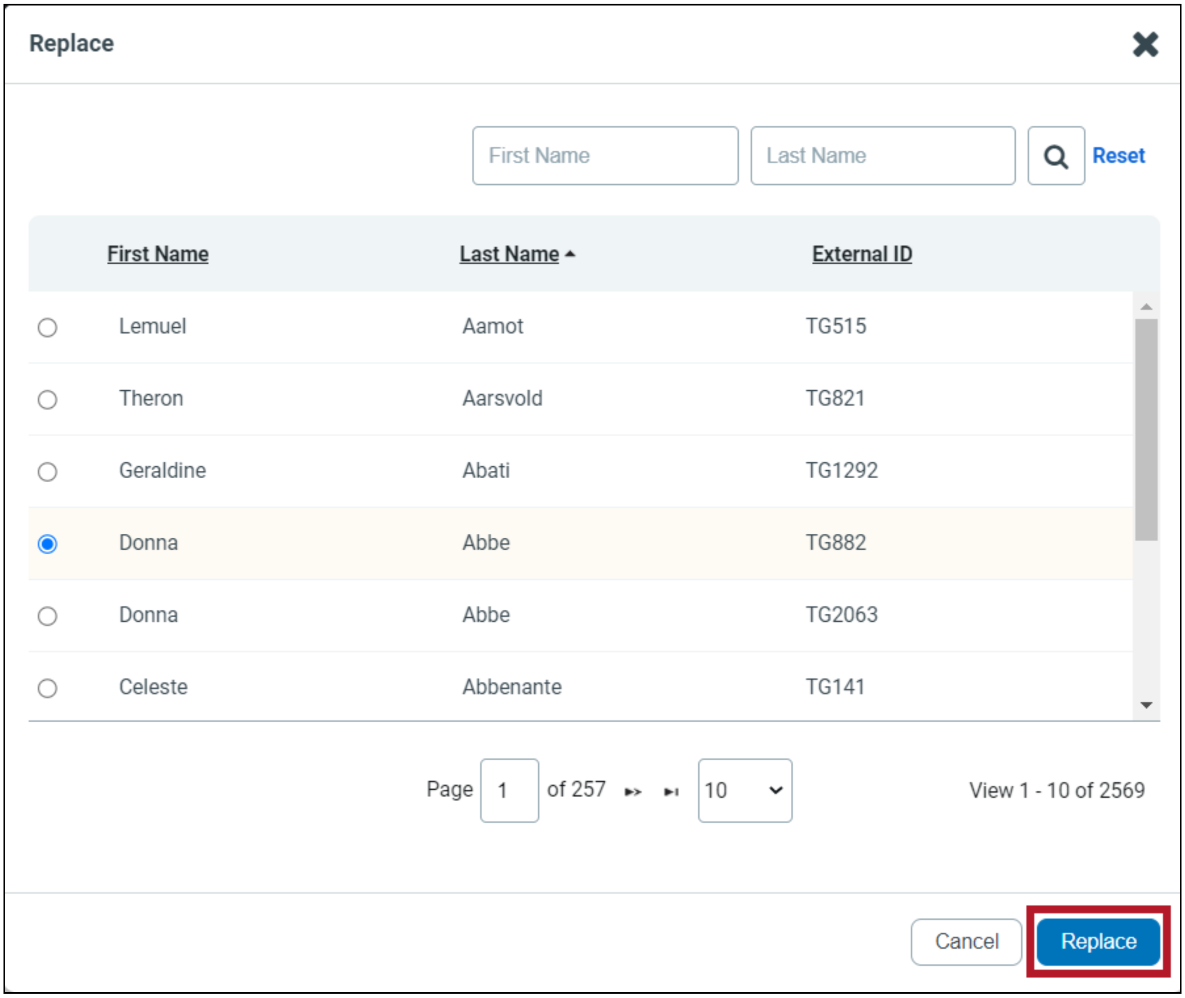
NOTE: A contact cannot be unavailable and set as a replacement at the same time.

When selecting **All day**, the unavailability starts at 00:00 on day1 and ends at 00:00 on day2. Therefore, if you make a contact unavailable all day on day1, but select that same contact as a replacement on day2, you need to select a Start and End for either day1 or day2 so there is no overlap between the unavailability and the replacement.

For example:

- Day1 - Unavailable from 00:00 to 23:59 and Day2 - All Day, or
- Day1 - All day and Day2 - 00:01 to 00:00

5. Click **Replace** to select a replacement.



When setting an unavailability and replacement, the minimum staffing requirement for the layers applies.

- The **Unavailability** setting without replacement fails if the minimum staff requirement is not met for any of the layers.
- You cannot replace a staff with an unavailable contact. If you select a replacement that is unavailable at any time during the period of time for which you set the unavailability, an error message is displayed, and the unavailability creation fails.

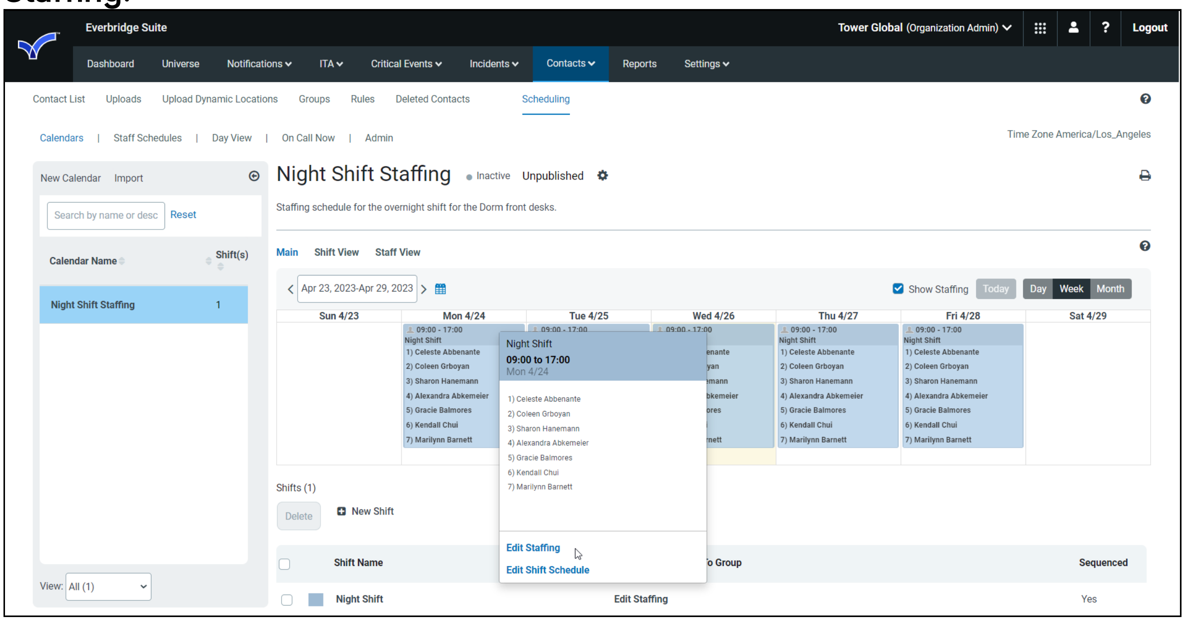
- The list of unavailability and their replacements for the specific contact is listed in the table after saving.

6. To Edit an unavailability, select the Pencil icon in the table.
7. To Delete an unavailability, select the **Delete** action in the table.

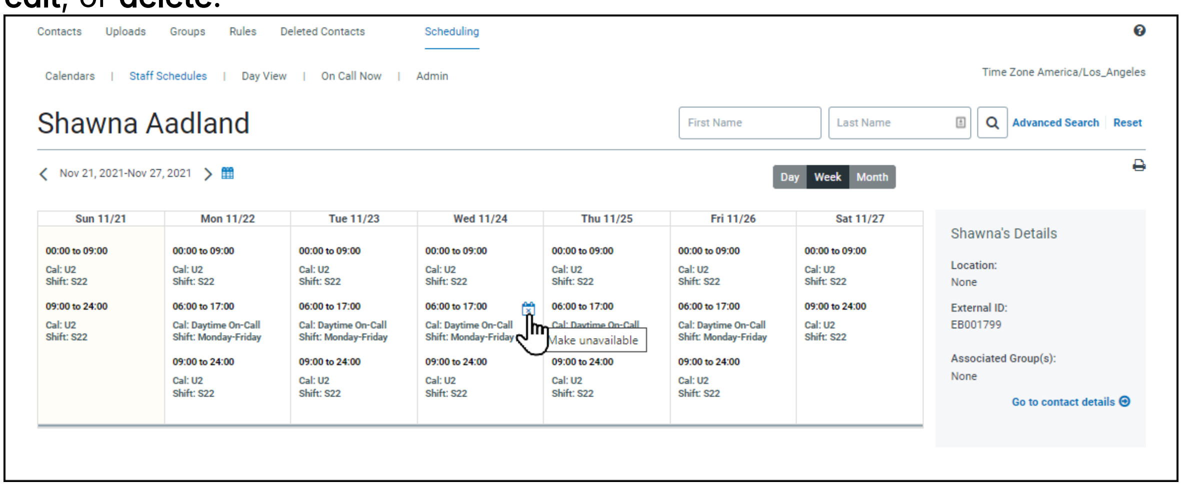
For any sequenced shift, the contact selected as a replacement takes the place of the contact it replaces in the sequence.

Unavailability can also be viewed, set, deleted, or edited for a specific contact in the following views:

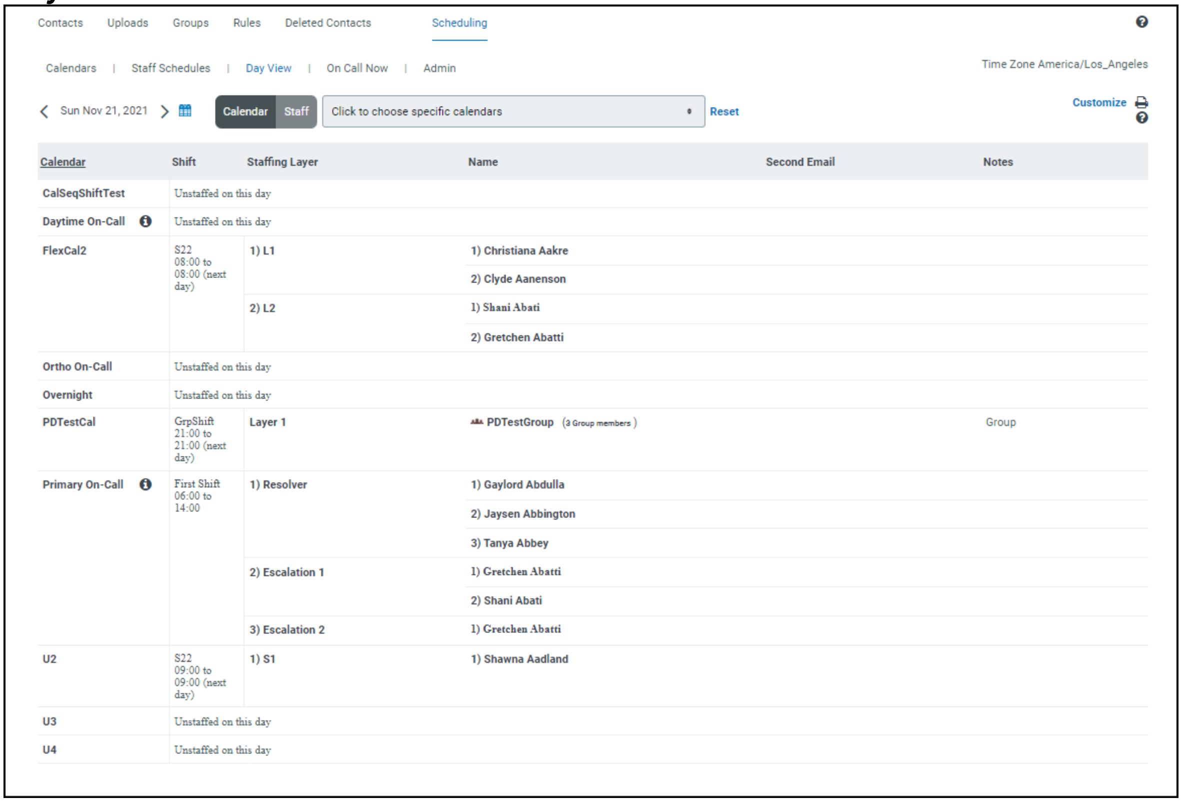
- **Calendar view** - Hover the mouse over a shift to see the staffing, select **Edit Staffing**.



- **Staff Schedule** - Hover the mouse over a shift and select **Make unavailable, edit**, or **delete**.



- **Day View** - Hover the mouse over a contact and select **Make unavailable**.



Self-Service Scheduling

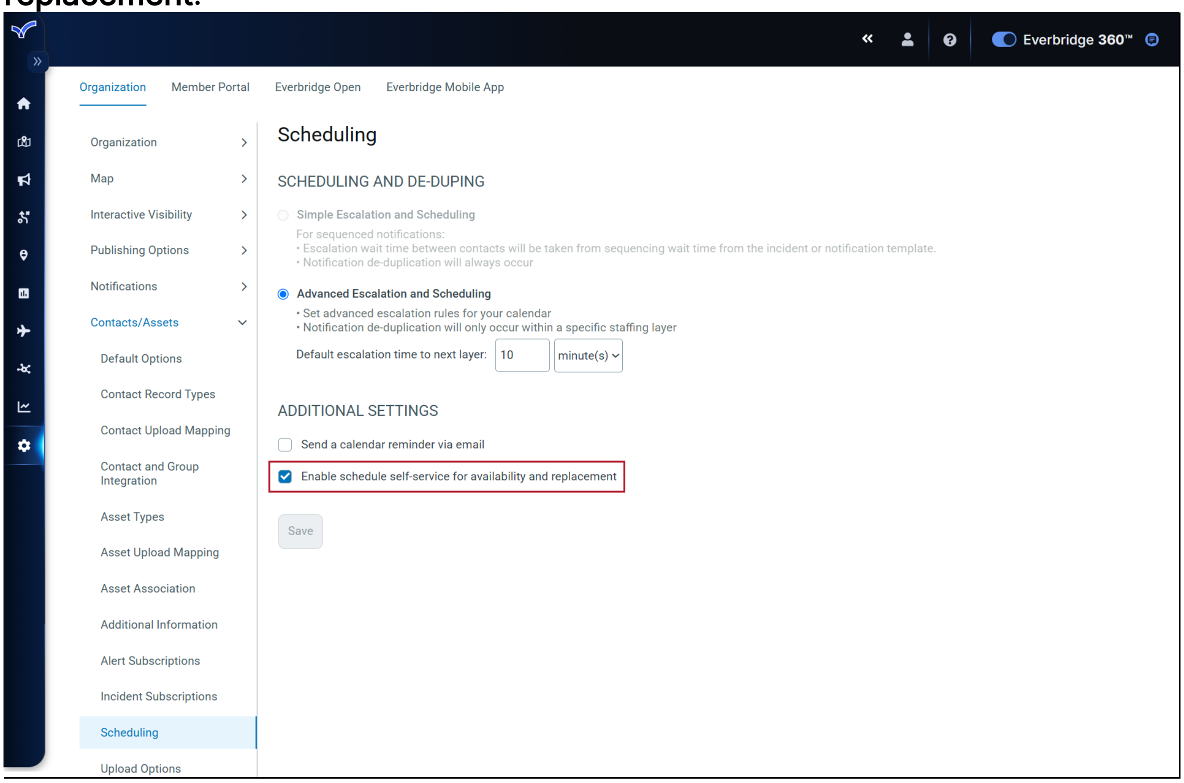
Using the Everbridge Mobile App or the Member Portal, staff members can use the Calendar to view their schedule and unavailability. Depending on the Organization settings, they can manage their unavailability (that is, make themselves unavailable and/or name replacements while they are unavailable or delete their unavailability).

Enabling Self-Service Scheduling

Administrators can enable Self-Service Scheduling for the entire Organization.

To enable self-service scheduling:

1. Navigate to **Settings** > **Organization** > **Contacts and Groups** > **Scheduling**.
2. Select the checkbox: **Enable schedule self-service for availability and replacement.**



- When enabled, contacts can view and manage their unavailability both from the Member Portal and the Everbridge Mobile App.
- When disabled, contacts can only view their unavailability. They cannot create, edit, or delete any unavailability.
- The option applies to both Member Portal and Everbridge Mobile App.

About On-Call Reminders

The **On-Call Reminder** feature allows contacts to be reminded by email a predefined time ahead of the start of their shift.

Reminders are enabled for an organization, then configured on a per Calendar and staffing layers basis.

When an on-call reminder is set up for a Calendar staffing layer, all on-call staff for that layer will receive an email at a predefined time prior to the start of their shift.

On-call reminders are only sent by email by a predefined email address **noreply@everbridge.net** to the on-call contacts registered email address.

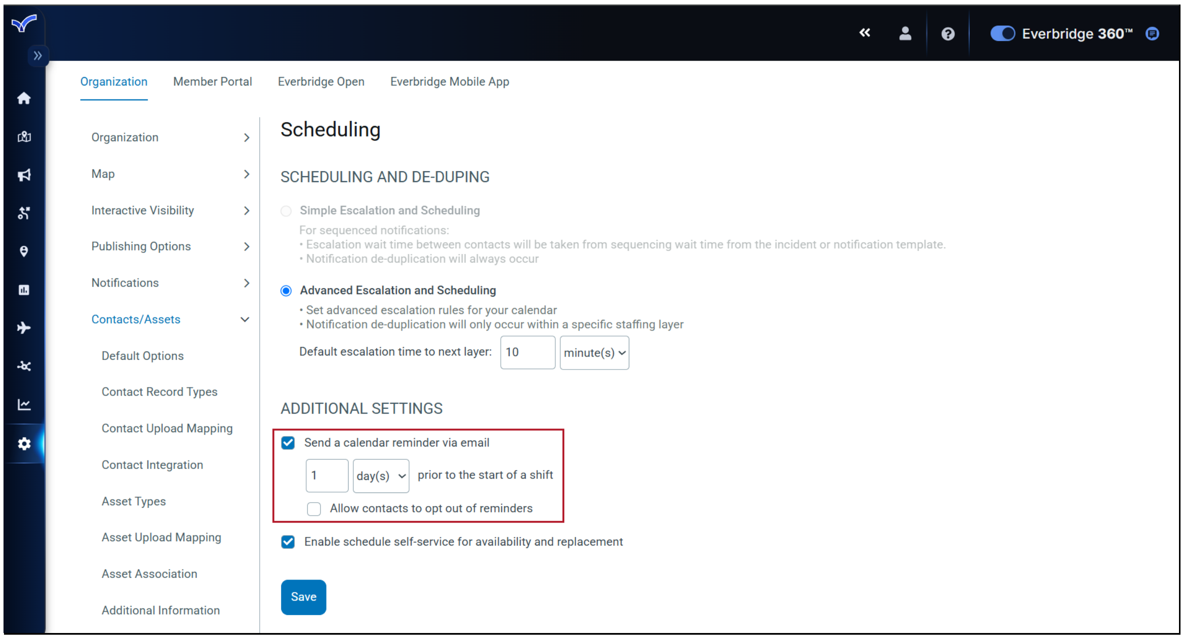
If there is no registered email address for the contact, On-Call Reminder email will be sent to the first email address specified in the delivery options for the contact.

Enable On-Call Reminder for an Organization

In order to receive an On-Call Reminder, the feature must first be turned on at the Organization level.

To enable the On-Call Reminder feature:

1. Navigate to **Settings** > **Organization** > **Contacts and Groups** > **Scheduling**.
2. Select the checkbox: **Send a Calendar reminder via email.**



3. Specify the time in hours or days prior to the start of the shift for which the reminder will be sent. The minimum time allowed to be set is 1 hour.
4. Specify whether you want to allow your contacts to be able to opt out of the reminders. By default, contacts can opt out of reminders from the Member Portal.
5. Click **Save**.
6. Time configured at the Organization level applies to all Calendars and layers where the On-Call Reminder has been enabled.
7. Disabling On-Call Reminder in an Organization wipes out all On-Call Reminder configurations made for Calendars and layers.
8. Every half hour, the system scans for the next reminder to be sent. Reminders are sent in a window of +/- 15 minutes of the scheduled time specified.
    - For example, the administrator set the reminder time to 1-hour before the start of the shift, and the shift starts at 8:00 AM. The reminder is sent between 6:45 AM and 7:15 AM (+/- 15 minutes from 1 hour before start of the shift).

Configuring On-Call Reminder for a Specific Calendar

Enabling the On-Call Reminder feature at the Organization level will allow you to configure On-call reminder for each individual Calendar. By default, none of the Calendars are configured to receive On-Call Reminders.

- Turning **on** On-Call Reminder for a specific Calendar will apply to all Staffing layers in the Calendar.
- Turning **off** On-Call Reminder for a specific Calendar will wipe out any on-call reminder configuration made for layers within that Calendar.

> **NOTE:** If On-Call Reminder is not enabled at the Organization level, the option will appear in the Calendar, but will be grayed out (not selectable).

To configure On-Call Reminder for a specific Calendar:

1. Navigate to **Contacts** > **Scheduling.**
2. Create a new Calendar or edit an existing one.
3. Under **Calendar Details**, select the checkbox: **Send an email reminder before a scheduled shift.**
4. Click **Save**.

Configuring On-Call Reminder for a Specific Layer

When On-Call Reminder is turned on for a Calendar, it applies to all staffing layers within this Calendar.

Each staffing layer can be configured individually, and On-Call Reminder can be turned off for a specific layer.

- If On-Call Reminder is not turned at the Organization level, the option will not be displayed in the layer.
- If On-Call Reminder is turned on at the Organization level, but not at the Calendar level, the option will be displayed but disabled in the layer.
- If On-Call Reminder is turned on at the Calendar level, the option is displayed and enabled in the layer.

To configure On-Call Reminder for a specific layer:

1. Create a new layer or edit an existing layer.
2. Clear the checkbox: **Send an email reminder before a scheduled shift** to turn off On-Call Reminder for the on-call staff of that specific layer.
3. Click **Save**.

Once the On-call Reminder has been turned off, it can be turned back on at any time.

Turning Off On-Call Reminders

When turning **off** On-Call Reminder for a Calendar, it wipes out all settings made for any layers within that Calendar. No further reminders are scheduled to be sent to on-call staff.

When disabling On-Call Reminder for an Organization, it wipes out all settings made for any Calendar and layers within the Organization. No further reminders are scheduled to be sent to on-call staff.

Opting Out of On-Call Reminders

Administrators can allow contacts to opt out from On-Call Reminders. This is an Organization setting and applies to all contacts in the Organization. When allowed, contacts will be able to opt out from the Member Portal.

To allow contacts to opt out from On-Call Reminders:

1. Navigate to **On Call Schedule** > **My Schedule**.
2. To opt out, clear the **Reminders** checkbox.
3. To opt in, select the **Reminders** checkbox. If opt-out has been restricted for the Organization, the checkbox is selected, but grayed out.

Auditing On-Call Reminders

On-Call Reminders configuration changes for layers and Calendars are displayed in **Scheduling** > **Admin** > **Audit log** > **Scheduling Audit**. It records per Calendar and per layer when and by whom the On-Call Reminder has been turned on or off.

If the On-Call Reminder feature has been disabled for the Organization, a specific item is recorded in the audit log that applies to all Calendars.

On-Call Reminder sending activity is recorded in **Scheduling** > **Admin** > **Audit log** > **Reminder Activity**. It records the reminder sending success/failure per Calendar and layer, along with the time sent. You can further filter by recipients and status.

About the Audit Log

All changes made to a schedule and on-call reminder activity are recorded and displayed in the **Audit Log**.

To use the Audit Log:

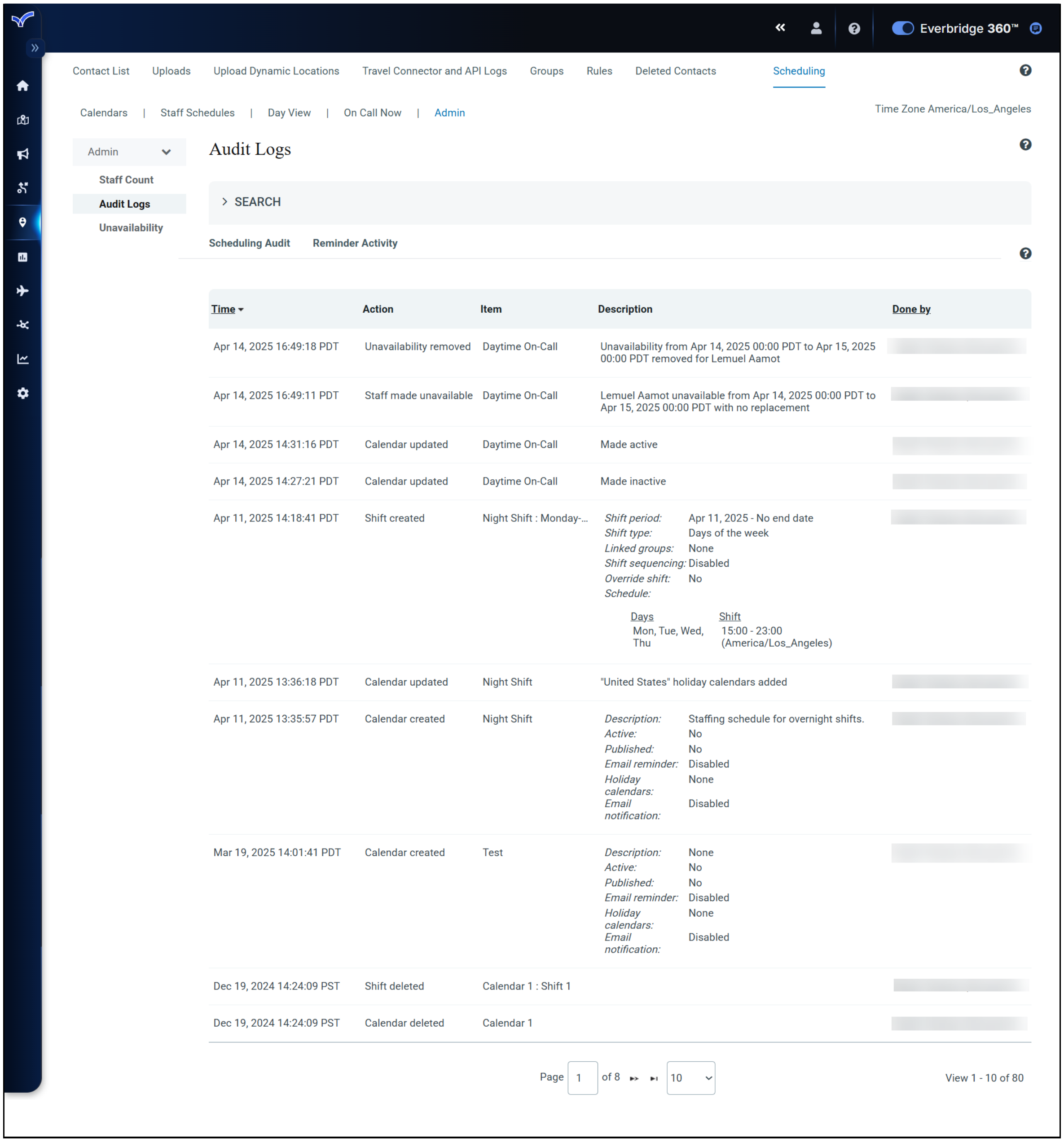
1. In the **Calendar Main** view, select your Calendar.
2. Select **Audit Log** in the action menu of the Calendar.

   It opens the audit log and filters all information for the specific selected Calendar.

Alternatively, you can:

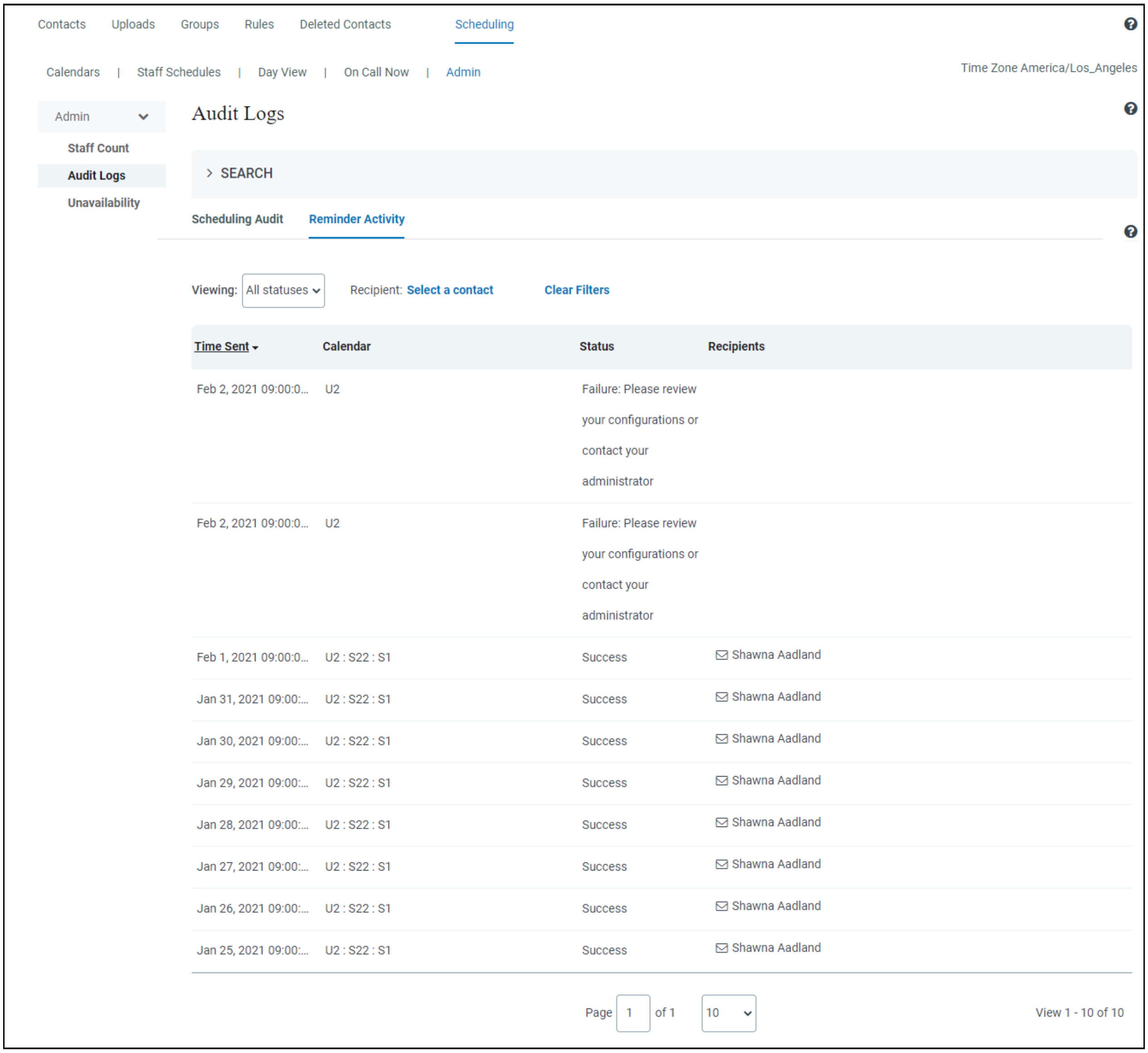
1. Select **Contacts** > **Scheduling** > **Admin** > **Audit Logs**.
2. Select the **Date Range** for which you want to run your audit as well as the Calendar, then select **Search**. By default, it displays the past six months and

all Calendars.



Reminder Activity

All the records for reminder sending success/failure per calendar and layers, along with the time sent, are displayed under the **Reminder Activity** subtab. You can further filter by recipients and status to narrow your results.



Scheduling Audit

Any changes made to a Calendar, shift, or layer are recorded under the **Scheduling Audit** tab. It records:

- **Time** -The time the change was made.
- **Action** - The action performed.
  - The item changed in the schedule or setting changed that will affect the schedule.
  - For Schedule items, the format is the following: Calendar:Shift:Layer.
- **Description** - A description of the change.
- **Done By** - Who performed the change.

Notify a Group Linked to a Calendar

Linking a group to a Calendar allows you to send a Notification to on-call staff of the linked Calendar. If there are no on-call contacts on the linked Calendar, the Notification is sent to all contacts in the selected group.

Link a Group to a Calendar

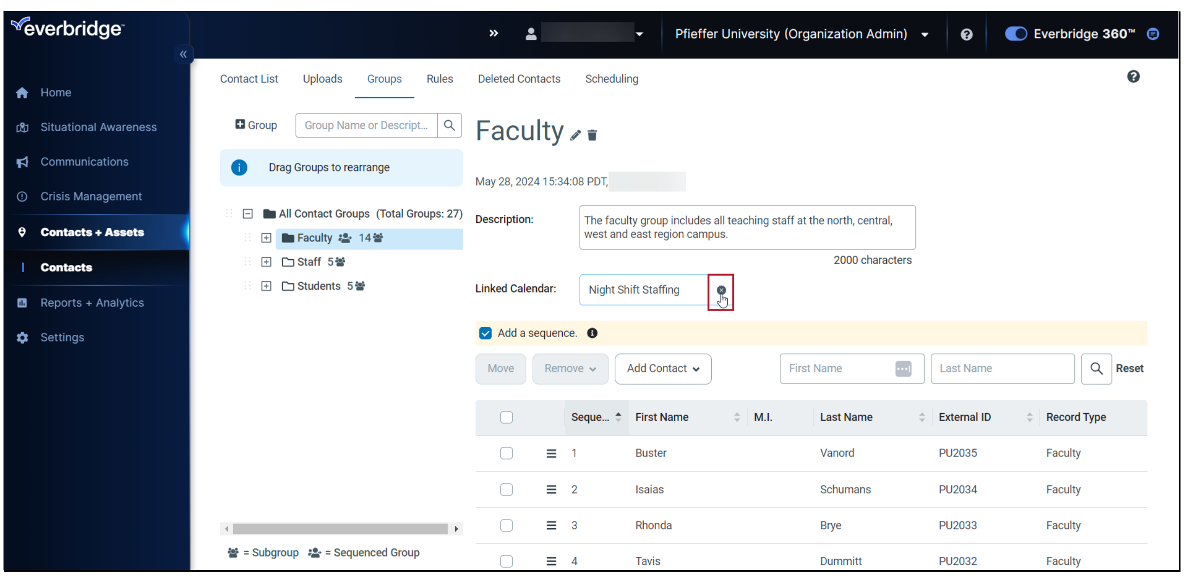
To link a group to a Calendar:

1. Navigate to **Contacts** > **Groups**.
2. In the **Linked Calendar** drop-down menu, select a Calendar.
    - Only an active Calendar can be selected.
    - There can be only one Calendar linked to a specific group.
    - There can be more than one group linked to the same Calendar.
    - If the Calendar is active, a link is displayed.

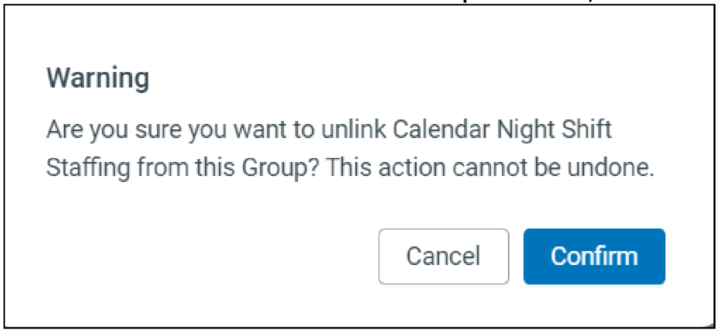
Unlink a Group from a Calendar

To unlink a group from a Calendar:

1. Navigate to **Contacts** > **Groups**.
2. In the **Linked Calendar** drop-down menu, select the Calendar.
3. Click the **X** button that appears when hovering the cursor over the chosen Calendar.



4. A confirmation modal will appear, warning that unlinking the group from the Calendar can't be undone. To proceed, click **Confirm**.



5. The group is unlinked from the Calendar.

Target Linked Group in a Notification

To target a group linked to a Calendar as part of a Notification:

1. Select **Incident** > **Templates**.
2. Select and edit your template.
3. From the **Contacts** tab, select **Groups**, then select your targeted group.
4. Select **Send to linked Calendar for all selected groups** in the Sending options.

When a Notification or Incident Notification targeting a group is sent, each selected group is checked for a linked Calendar before broadcasting so that the Notification is sent to the on-call contacts on the linked Calendar. If there are no on-call contacts on the linked Calendar, the Notification is sent to all contacts in the selected group. If the group is sequenced, the sequence is honored.

Notify On-Call Staff Using Rules

When you send a Notification, you can apply a rule based on the characteristics of the contact that will receive the message. Rules can be added to Name, Location, Delivery Method, and the other contact data fields.

Rules are a dynamic way of selecting contacts using multiple filters based on their contact information, such as Name and Address, Calendar, or Additional Information that is custom to your Organization.

If the data content for a contact record is current, then the rule is up-to-date whenever you send a notification. You do not have to "maintain" the list.

Create Notification Target Rule

To create a rule to be used as a notification target:

1. Navigate to **Contacts** > **Rules**.
2. Select **Add** to create a new rule.
3. Specify a Rule Name.
4. Select **Calendar** as a filter criterion and the targeted Calendar.
5. Specify the shift you want to target.
6. Add any additional filter criteria you want.

Target Rules in a Notification

To target a rule as part of a notification:

1. Select **Incident** > **Templates**.
2. Select and Edit your template.
3. From the **Contacts** tab, select **Rules**, then select your targeted Rule.