Travel Protector User Guide

Everbridge Suite

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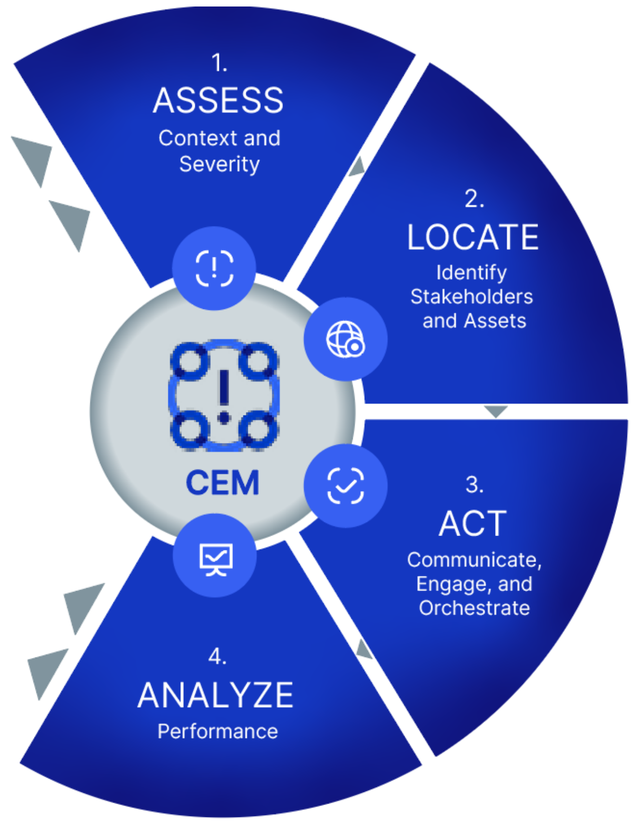
Travel Risk Management

Everbridge Travel Risk Management for CEM clients brings together the best of both worlds – travel risk management and critical event management within a single pane of glass. Through Risk Event correlation with employees, travelers, assets, and targeted real-time alerting, organizations can proactively monitor and analyze Incidents and events worldwide, dramatically increasing the ability to respond to risks that threaten people, assets, operations, and organizations – locally and globally.

Everbridge Travel Risk Management for CEM allows users to send notifications to individuals or groups using lists, locations, and visual intelligence. The solution is supported by state-of-the-art security protocols, elastic infrastructure, advanced mobility, interactive reporting and analytics, adaptive contact and resource mapping to mirror your organization, and true enterprise-class data management capabilities to provide a wide array of data management options.

- **Duty of Care** – The legal responsibility of an organization to do everything "reasonably practical" to protect the health and safety of employees.
- **Duty to Disclose** – Organizations need to monitor and disclose risks. What are the threats and risks to travelers? Answering the question: "Should the company have known?"
- **Standard of Care** – If other enterprises in the industry or of a like size are doing something to protect their staff, then those enterprises NOT doing similar or better can be held liable. Similar liability can exist if there is an unequal level of support for executives versus subordinates.
- **Travel Risk Management (TRM)** – "TRM requires that organizations anticipate and assess the potential for events, develop treatments, and communicate anticipated risk exposures to their travelers. Advising and providing travelers with adequate medical and emergency response guidance, security, and information security precautions, including challenges to travel logistics, can significantly impact the outcome of disruptive events." - **ISO 31030**

ISO 31030 is a derivative of the larger ISO 31000 guidelines around Risk Management.



Assess

- Pre-trip country reports via the Everbridge Manager Portal.
- Customized Risk Rating and Country Report content and add attachments per country.
- Traveler pre-trip advisory upon booking – optionally excludes home country and connection cities; the Incident template is configurable with attachments and body of the email.
- Delivery paths include email, SMS, and mobile push notification with HTML links.
- Integration with Sherpa via Everbridge Mobile for traveler access to entry/exit requirements and COVID-19 travel restrictions globally.
- Risk Feeds: Earthquakes, Hurricanes, Everbridge Risk Intelligence Monitoring Center (RIMC) COVID-19, Everbridge Risk Events, Weather Events (Australia), Weather Events (Canada), Weather Events (Europe), Weather Events (Japan), Weather Events (US), and Wildfires.
- Travel data feed of travel itinerary information from travel management companies, online booking tools, airlines, accommodation providers, rail, and aggregators.
- Travel itinerary matched to contact record via contact ID, external ID, or an algorithm of traveler to contact name.
- Temporary traveler contact record will be created if a contact match cannot be made and will include the email address and phone number associated with the travel itinerary.
- Temporary traveler contact record will be deleted 90 days post-travel.

- Ability to import travel manually via a manifest upload via Everbridge Manager Portal.
- Travel itinerary audit log showing success/failure of all imported travel reservations with the ability to search by PNR locator, traveler name, timeline, or status.
- Email parsing of Travel Itineraries will incur additional charges.

Locate

- Creation of a dynamic location based on a travel itinerary.
- Travel visualization within Visual Command Center with travel-centric map filters for air, rail, car, hotel, departure, transit, arrival, local and non-local, and domestic and international.
- Quick view buttons to visualize who is traveling currently, within the next 48 hours, within the next 7 days, and by custom time frame.
- Access to SOS, Safe Corridor, and Emergency Call in the Everbridge Mobile App to allow contacts to check in and the organization to automate outreach to predefined contacts, and to require check-in and location monitoring capabilities within a specific geographic area.
- Access to Private Incident Zones to geofence and communicate to people based on dynamic locations within a geofence.

Act

- Risk event correlation to travelers and travel-centric assets like preferred hotels or meetings and events
- Automated and ad hoc Incident communication templates customized to risk events
- Automated Incident communication workflows can be created to notify travelers prior to, during, and post travel.
- Automated Incident communication workflows can be created to notify travel or security managers prior to, during, and after travel or event with an attached report of all impacted contacts.
- Automated Incident communications filtered down to the traveler or asset level for granular control over what risk events at what level are delivered and how.
- VIPs and Expats can have separate communication workflows and templates.
- Ability to automatically trigger communications at configurable intervals to individuals who haven't responded within a certain time frame.
- Delivery methods include email, SMS, mobile push notification, or phone.
- Ability to create conference call lines and open chat channels for triage and ongoing support during Risk Events.
- Mobile App customization to provide a holistic approach for action, including one-touch dialing to assistance providers and travel management companies, custom documents on insurance, etc. configurable by contact groups or rules.

Analyze

- Visualization of Risk Events, contacts, and assets and the ability to document and snooze open impacting events.
- Travel-centric map layers for ad hoc analysis, including Travel Risk Ratings, RIMC Risk Ratings, emergency response facilities, diplomatic missions, global COVID-19 information, FEMA hurricane evacuation routes, FEMA hurricane storm surge, weather conditions, and forecast imagery, hospital locations.
- Map/GIS-based Tools: Day/Night Shadow, Export Map Image, Full Screen, Lat/Long Grid, Lat/Long Sensor, Map Annotation, Scale Bar, Map Unit Conversion (mi/km/nm).
- Incident reporting on responses and impact.
- Canned and custom reporting available via Everbridge Manager Portal.

User Interface Components

When using Travel Risk Management, you will need two components of CEM: **Everbridge Manager Portal** and **Visual Command Center**, depending on the operation. The following table indicates where each operation will be performed.

Operation	Manager Portal	VCC
Creating Users (Travel Manager, Security Manager, etc.)	X	
Editing Traveler Types (Employees, etc.)	X	
Editing Traveler Properties (VIP, Expats, etc.)	X	
Managing Countries, Cities and Airlines Intelligence	X	
Setting Pre-Trip Advisories and Booking Alerts	X	
Setting Traveler Communications Templates and Workflows	X	
Setting Travel Incident Templates	X	
Viewing Itineraries	X	X
Managing Risk Feed		X
Setting Alerts		X
Viewing Risk Events		X
Viewing Alerts for Risk Events		X
Sending Alert-based Communications to Affected Travelers		X
Sending General Communications to Travelers	X	X
Viewing List of Incident Communications Sent to a Specific Traveler	X	X

Roles

Everbridge Suite users are assigned roles that define their level and areas of access. A user may even have multiple roles given their functions and the needs of the Incident. Roles in Everbridge Suite are a collection of permissions that allow users access to perform distinct functions within the system. Roles also have settings that you may configure to best suit your business needs.

The available roles exist on one of two levels:

- **Account Level**
    - Account Administrator

- **Organization Level**
  - Incident Administrator
  - Mass Notification Operator
  - Incident Administrator
  - Incident Operator
  - Group Manager
  - Data Manager
  - Dispatcher

In addition, for more granularity, the Custom Roles feature allows administrators to fully configure existing feature level permissions by using a base template from existing roles, where they can add or remove individual permissions consistent with their Organization's needs.

In Travel Risk Management, you will create and configure roles and assigned them to users depending on the level of permission you want to provide them.

Action	Organization Administrator	Incident Administrator	Incident Operator
Set Up Travel Communication Templates	X	X	
Create Orchestration Workflows	X	X	
Set Up Pre-trip Advisories	X	Configurable	
Set Up Booking Alerts	X	Configurable	
Manage Contacts	X	X	
Launch Incidents	X	X	X
Use VCC Admin	X	Configure	
View itineraries in VCC	X	X	X
View Itineraries in Manager Portal	X	X	
View and Manage Alerts in VCC	X	X	X
View Traveler Reports in Manager portal	X	Configurable	
Create and Schedule Custom Reports	X	Configurable	

The following travel-related permissions are available to tailor the roles of your Travel Managers and Security users. Additional permissions can be configured to access VCC, contact records and send communications.

Permission	Description	Custom Role Template Configurability	Legacy Roles Templates	Additional Permission Required
Create, edit, Delete custom travel custom reports	Allows user to access the Reports menu and create Travel Segments custom reports.	All	• Incident Admin • Data Manager	• View Travel report • View and download contact records information • View building layer & airport and railway station layer
View Travel Reports	View and download all travel reports. Reports will only includes the travelers the user has access to.	All	• Incident Admin • Data Manager	• View and download contact record information • View the Last Known and Expected Location of contacts
View itineraries and segments	In VCC, Seach for travel information, access the list of itineraries for a contact. In Manager Portal, access the Itineraries page.	All	• Incident Admin • Incident Operator • Group manager • Data Manager	
Create, edit, and delete	Ability to create travel itineraries	All	• Incident Admin	• View the Last Known and

Travel Itineraries	using the Itineraries REST API and the utility importer.		• Data Manager	Expected Location of contacts • Edit contacts
View Risk Intelligence	Access the Travel Risk intelligence and view country/city reports. Access the Airline risk intelligence and view airline details.	All	• Incident Admin • Incident Operator • Group Manager • Data Manager	
Manage Risk Intelligence	Set custom risk levels for Countries, cities and airlines. Set pre-trip advisories. Add/Remove airlines from custom banned list.	All	• Incident Admin	• View Risk Intelligence • Launch and Manage Incidents
Manage Booking Alerts	View, create, edit and delete booking alerts	All	• Incident Admin	• Launch and Manage Incidents
Manage Travel Approval Policies	Access the Travel Policies page and View, Create, Edit, Delete country travel policies	All	• Incident Admin	• View contact name and External ID • Launch and Manage Incidents

Travel Terminology

The following acronyms are commonly used in travel management:

- **PNR**: Passenger Name Record.
- **TMC**: Travel Management Company.
- **OBT**: Online Booking Tool.
- **GDS**: Global Distribution System. These are the reservation systems that TMCs and OBTs use to book travel reservations.
- **PCC**: Pseudo City Code. Location in the GDS in which travel reservations are booked. These are unique to TMCs, but travel reservations could be in multiple PCCs with one TMC.
- **Record Locator/PNR ID**: This is a 6-character code assigned in the GDS and Vendor for a Travel Itinerary.
- **Travel Itinerary/Reservation**: Share a common record locator and/or PNR ID in the GDS.
- **Travel Segments**: Individual flights, hotels, cars, trains, etc. that combined make up a Travel Itinerary/reservation.

Contact Management

Users can create Incidents or Notifications, manage settings, or work with contact data. They log in to the Everbridge Manager Portal or to Visual Command Center to perform these functions.

Contacts are who receive these Notifications or Incidents. Travelers are contacts who have associated Itineraries or travel locations. To satisfy your travel use cases, you may need to make changes to the way contacts are configured, for example adding new contact types or new fields that apply to travelers.

> **NOTE:** A user is typically **also** a contact. The user may have a contact record for testing purposes. Or, in the case of an Organization sending Notifications to its own employees, the user is part of the audience that needs to receive that alert.

Contacts (Travelers)

In addition to the standard information fields that all contacts have, additional information fields can be configured for contacts to satisfy different travel use cases.

Travel-Related Use Cases

Use Case #1: As a travel manager, I would like to add emergency contact information to all my contacts so that in the case of an emergency, I do not need to access two systems to obtain this information.

Use Case #2: As a travel manager, I would like to be able to manage any known allergies, etc. should a contact need medical assistance.

Use Case #3: As a travel manager, I would like to collect any certifications travelers have like CPR, etc. to be able to assist in the case of an emergency.

Travel-Specific Contact Fields

The following travel-specific contact fields can be used in dynamic groups, advanced search, rules, Notifications, Incidents, or Communications.

Data Type	Field Type	Field Name

Travel Segment	Multi-Select	Travel Type (International/Domestic/Unknown)
Travel Segment	Single-Select	Local Travel (Yes/No/Unknown)
Travel Segment	Multi-Select	From Airport/Railway Station Code (fromIATA)
Travel Segment	Multi-Select	To Airport/Railway station code (toIATA)
Travel Segment	Multi-Select	Segment type (Air/Train/Car/Hotel)
Travel Segment	Text Field	Airline/Train Code
Travel Segment	Text Field	Supplier Name
Travel Segment	Single-Select	Destination Country (toCountry)
Travel Segment	Single-Select	Country of Origin (fromCountry)
Travel Itinerary	Date Picker	Start Date
Travel Itinerary	Date Picker	End Date
Travel Time Range	Date Picker	Date/Time Range (now, next X day/weeks/ month, custom. Uses segment from/toLocation date)

NOTE: Travel-related fields are only available to Travel Protector customers.

Defining Traveler Types

Contact General Information

The **General Information** section of the contact record contains the name and ID information for the contact. Required fields have a red asterisk (*) next to the field label.

- First Name
- Middle Initial
- Last Name
- Suffix
- **External ID** - Must be unique in the Organization. The unique ID prevents duplication of records and customizes individuals with the same name. Your Organization might use Employee ID numbers or some other plan that contains unique IDs. External ID is case-sensitive and can be used by the travel connector to match travelers in the itinerary with their proper contact record in Everbridge.
- Records types in the menu are configured by the administrator for this particular Organization.
- The SSO User ID is shown here, if applicable.
- **VIP and Expatriate** - If the contact is an Expatriate or VIP, toggle the corresponding switch to mark this status on the contact record. These system attributes are displayed in the Manager Portal and fully supported by contact rules, dynamic groups, and contact APIs.

Contact Record Types

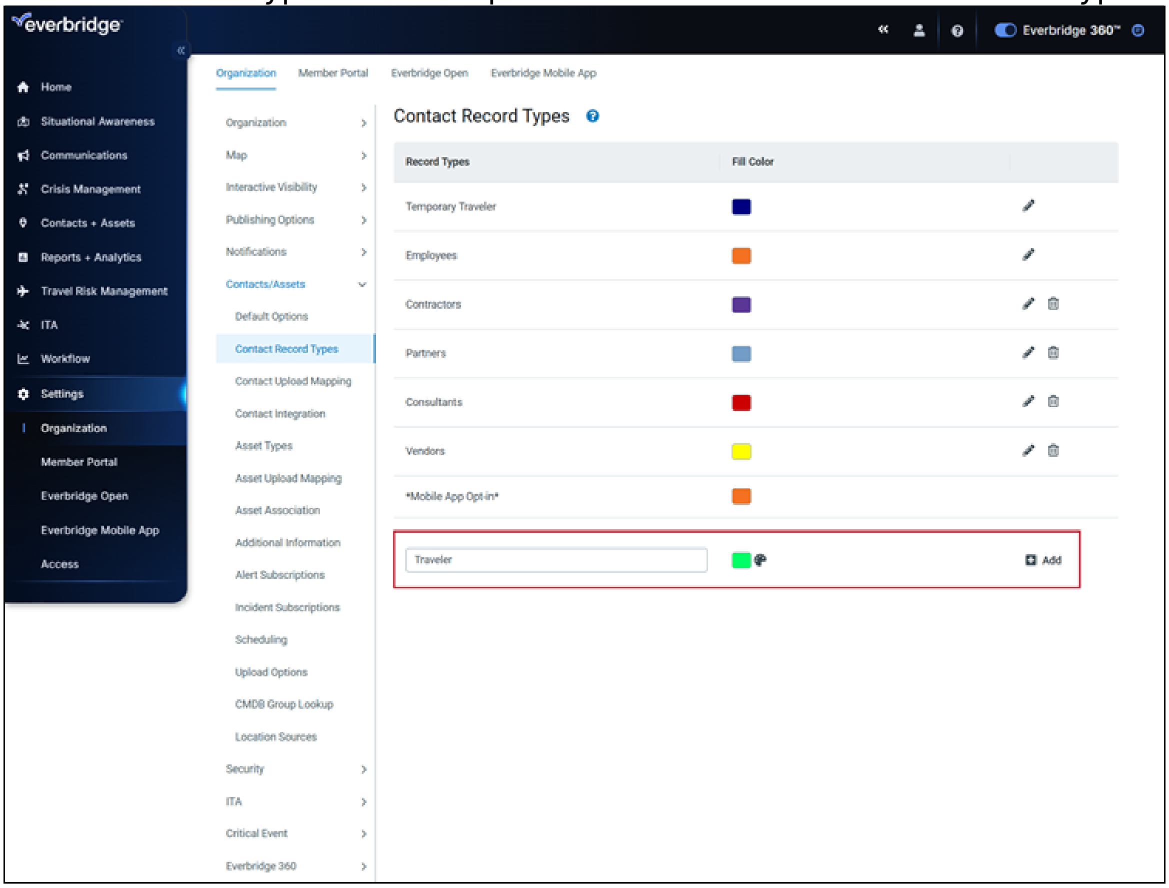
Not all Travelers require the same information or communication levels. In Everbridge, each traveler is represented as a **Contact**. When you create an Incident, you can choose which contacts the Incident Communications are sent to, based on the **Contact Type** and **Contact Location Type** (Static, Last Known, Expected, Travel).

Create Contact Record Type

You can define different types of contacts using the **Contact Type** field. As an Organization Administrator:

1. Navigate to the Manager Portal: **Settings** > **Contacts/Assets** > **Contact Record Types**.

2. Add the contact types. You can pick a different color for each contact type.

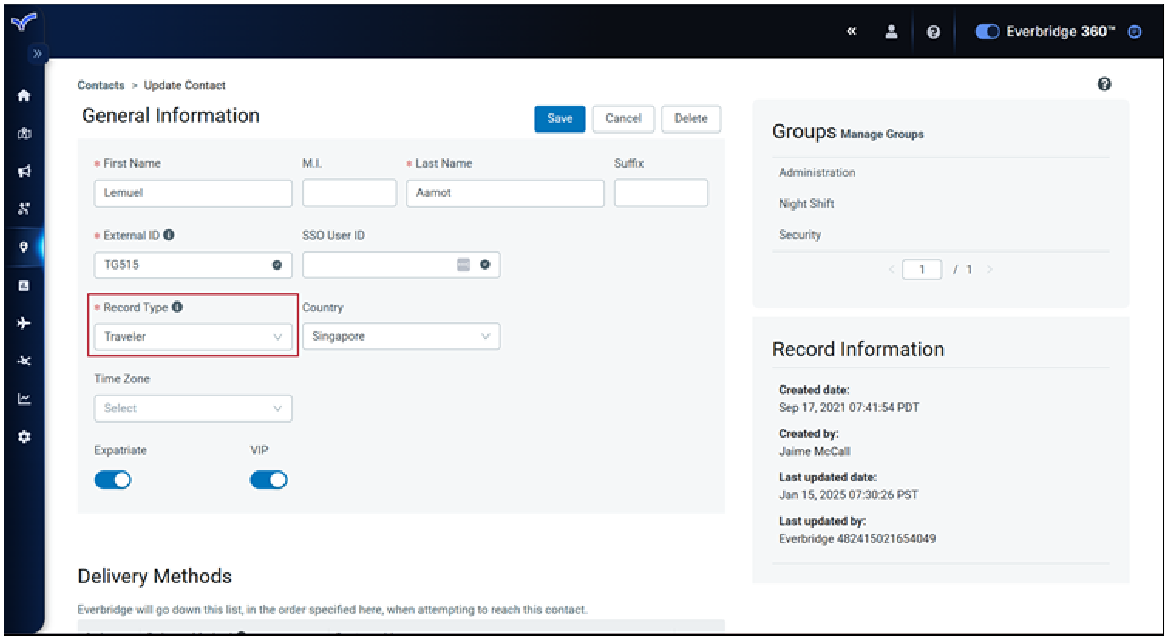


Assign Contact Record Type

Once your contact record types are defined, you can assign them to your travelers:

1. Navigate to the Manager Portal.
2. Select **Contacts** > **Contact List.**
3. Select the pencil icon in front of the contact.
4. Select the proper Record Type in the dropdown menu.

5. Click **Save**.



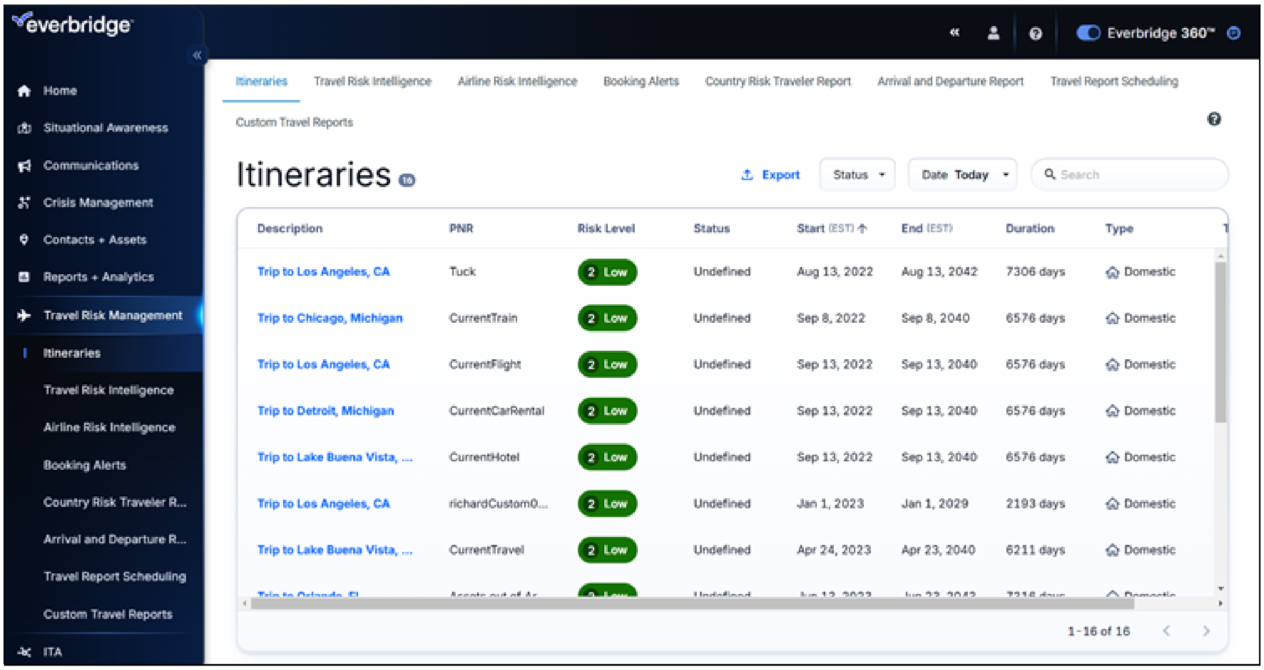
The type is unique for each contact but can be changed at any time. When changed, the new type will be used for all future communications.

Additional Information Fields

Additional information fields help categorize contacts with more detailed information. For example, an additional information field can categorize contacts to distinguish managers from contractors. For more information, please see the Support Center.

Itineraries

The **Itineraries** page is designed for Travel Managers and GSOC users to have a comprehensive view of all itineraries at once for ensuring efficient management, coordination and optimization of your corporate travel. It can be found at **Travel Risk Management** > **Itineraries**.



By consolidating all travel plans into a single, centralized location, it provides:

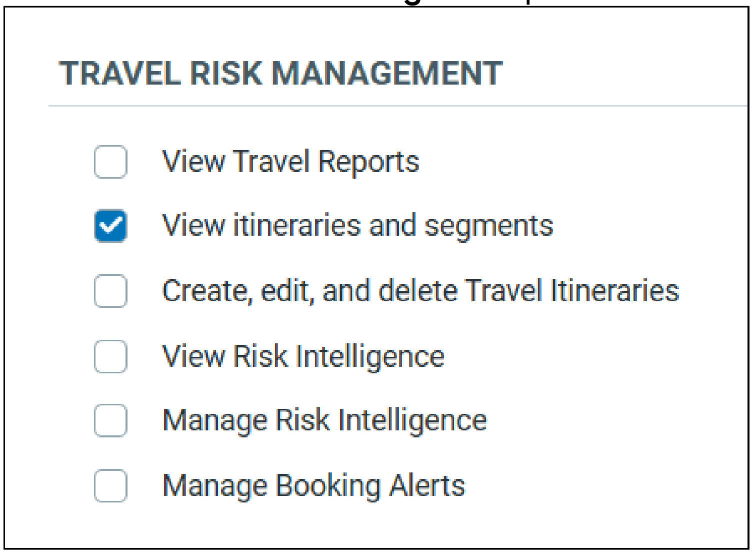
- **Enhanced Visibility** - A unified view of all itineraries allows for immediate access to travel details across the entire team. This visibility helps in tracking travel schedules, understanding overlap, and identifying any potential conflicts or issues before they arise.
- **Efficient Problem Resolution** - In the event of disruptions or emergencies, having all itineraries at hand enables quick decision-making and effective problem resolution. This proactive approach minimizes downtime and ensures that travelers are supported throughout their journey.

Accessing the Itineraries Page

The **Itineraries** page is accessible from the Manager Portal to users who have a role with the **View Itineraries and segments** permission enabled. To set the permission as an Account or Organization Administrator:

1. Navigate to **Settings** > **Access** > **Roles**.
2. Select the role you want to update or create a new role.

3. Select **Permissions** and under the Travel Risk Management section, enable the **View itineraries and segments** permission.

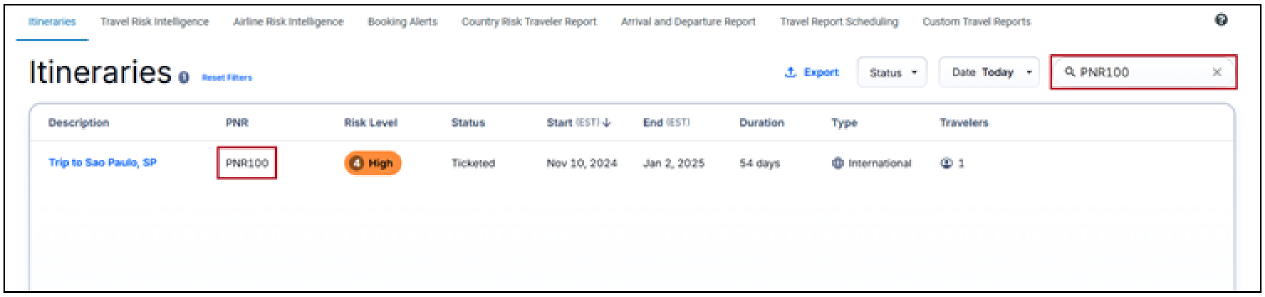


4. Optionally, you can limit access to specific contact in your Organization by clicking **Resources** > **Contacts** > **Limited Access** and selecting the groups or dynamic groups you want to provide access for the role.

Viewing Itineraries

When accessing the page, 500 current active itineraries are displayed as a list by default. You can refine the list by searching or filtering by date or status. Itineraries can be searched by:

- Flight/Rail Number
- PNR Number
- Traveler Name
- Hotel Name
- Location Name
- Airline
- Car Rental Company
- Address
- City
- State
- ZIP Code
- Country Code



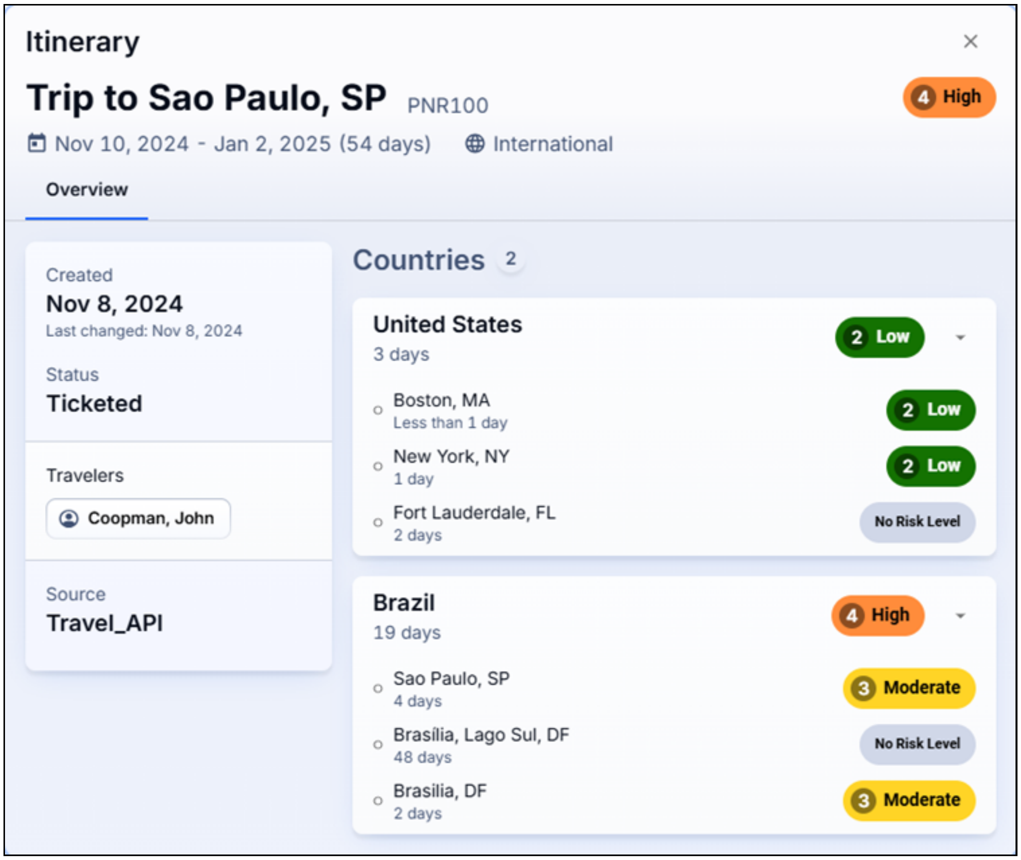
Search results can be further filtered by date range and status (booked or ticketed). The following information is available in the search results:

- **Description** - Shows the final destination of the itinerary. The final destination is calculated based on the segment information contained in the itinerary. It displays either the City and Country or the City and State when a state exists in the destination location.
- **PNR** - Itinerary record locator.
- **Risk Level** - Risk level indicator of the itinerary. The risk level is calculated and represent the country highest risk level of the itinerary.
- **Status** - indicate whether the itinerary is ticketed or booked. When no information is available, the status is displayed as Undefined
- **Start and End Date** - Calculated from the first segment start date and the last segment end date.
- **Duration** - Calculated duration of the trip in days
- **Type** - Calculated using the segments country
    - International: there are more than one country in the itinerary
    - Domestic: there is only one country in the itinerary
- **Travelers** - Number of travelers in the itinerary. You can mouse over to show the list of travelers.
- **Approval Status** - Whether the itinerary is approved or denied. All domestic itineraries are automatically approved, International itineraries can follow a review process.
- **Reviewers** - List of reviewers for the itineraries as set in the travel policies.

Viewing Itinerary Details

Selecting an itinerary opens its details. In the Overview page, additional information is available on the left, such as:

- Itinerary created date
- Itinerary last updated date
- Status
- List of travelers
- Source
- Cost center
- List of reviewers



In the right panel, the destinations (Countries and Cities) are listed along with their respective overall risk level and the calculated number of days the traveler will spend there.

Post-Booking Approval Process

When an international itinerary is created in Travel Protector, it is assessed according to the established Travel Policies. International itineraries are the ones where there is more than one destination country.

Policies are checked for each destination locations based on their respective risk level for all segment types in the itineraries (including transit).

- If approval is required for at least one country and the itinerary is international, the status will be set to **Waiting for Traveler**, and a notification is sent to the travelers using the template set.
- If travel is denied to one destination country and the itinerary is international, the itinerary will be automatically denied, and the status will be set to **Denied**.
- If no approvals are required for any countries, the itinerary is automatically approved, and the status is set to **Approved**.

When an itinerary is updated, it is re-assessed in the following conditions:

- A country was added as a new destination.
- A denied country is removed from the itinerary.
- Destination country or city changed in a segment to a country requiring approval.

Traveler Notification

When approval is required, a Notification is automatically sent to all contacts matched to the travelers in the itinerary. Travelers can access the form using the link in the message after authenticating to the Member Portal. Only one traveler needs to complete and submit the form.

The form is resent to the travelers when:

- New countries requiring approval are added.
- Countries requiring approval are removed and the itinerary is not yet approved.
- The traveler list has changed.

Travelers can open the form after authenticating to the Member Portal or the mobile app, fill up the form and submit it. The form can be submitted more than once, only the latest answers are displayed in the itinerary detail.

Approving an Itinerary

When a traveler submits the form, the responses are linked to the itinerary and a Notification is automatically sent to all the reviewers listed on the policies for all destination countries requiring approval. Information in the Notification message is fully configurable.

Reviewers must open the itinerary in the Manager Portal in the **Itinerary** page. A direct link to the itinerary can be added to the message using the **_Travel: PNR URL** system variable.

In the details of the itinerary, an **Approval** tab is displayed. For security and privacy reasons, this tab is only visible to the reviewers of the itinerary, Organization Administrators, and Account Administrators. All other users are able to see the approval status and list of reviewers in the itinerary page but cannot access the Approval tab.

The Approval tab includes the following information:

- The itinerary Approval status.

- The travelers' responses to the questionnaire.
- The name of the travelers who submitted the responses.
- The list of Travelers.
- The list of destination countries.
- The reviewers for each country.
- The users who approved or denied countries in the itinerary.

Reviewing an Itinerary

Itinerary review, approval, or denial occurs in the Manager Portal. An itinerary is approved when travel to all destination countries is approved. An itinerary is denied when travel to one destination country is denied. You can only review, approve or deny travel to countries you are a reviewer for.

> **NOTE:** Note: Account and Organization administrators can review, approve, or deny travel to any countries.

To review an itinerary:

1. Navigate to the **Itineraries** page.
2. Search or filter for the itinerary you want to review.
3. Select the itinerary to display its details. Optionally, you can open the itinerary by selecting the link in the Notification you received.
4. Select the **Approval** tab to display the **Travel Review Form** submitted by the traveler.
5. Select **Review Travel** to open the list of country for which you are a reviewer for.
6. Select either **Approve Travel** or **Deny Travel** for each country for which you're a reviewer.
7. Enter a note for approval (optional) or rationale for deny (required).
8. Select **Submit**.

The user who approved or deny a country is recorded along with the date of the action.

Overriding Approval or Denial of an Itinerary

To prevent reprocessing itineraries and resending review form to travelers, overriding the approval or denial of an itinerary is possible at any time.

Reviewers can override decisions for the countries they are reviewer for, while Account and Organization Administrators can override decisions for any countries, including the ones who do not have policies or policies that would automatically deny travel.

Approval and deny rules still apply:

- Itinerary is approved if travel to all destination countries is approved.
- Itinerary is denied if travel to one destination country is denied.

To override an approval decision:

1. Navigate to the **Itineraries** page.
2. Search or filter for the itinerary you want to review.
3. Select the itinerary to display its details.
4. Select **Review Travel** to open the list of country for which you are a reviewer for. Account and Organization Administrators will see the list of all destination countries.
5. For each country, select either **Approve Travel** or **Deny Travel**.
6. Enter a note for approval (optional) or rationale for deny (required).
7. Select **Submit**.
8. The itinerary approval status is updated and actions updated for each country.

Viewing Approval Status and Reviewers

From the itinerary table or the Itinerary Details, you can view at any time the approval status of itinerary as well as reviewers, approvers, and deniers.

In the itinerary table, you can filter by approval status as well as reviewers.

In the Itinerary Details, approvers and deniers are shown for each individual countries requiring approval.
Reviewers show either as:

- **System** - The itinerary was automatically approved, and no policies existed for the countries of travel, a policy was added after the itinerary was approved.
- **By Policy** - A country of travel was automatically approved or denied by a policy.
- **User First, Last Name** - User who approve or deny travel to a country.

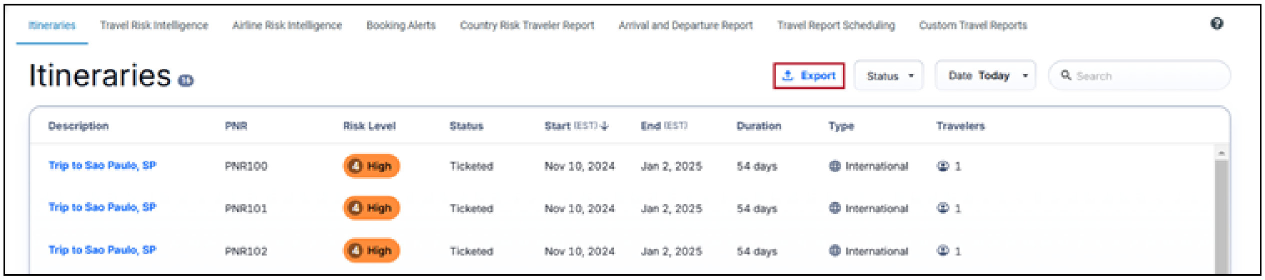
In the Itinerary Details, from the reviewer section:

1. Only countries that are in the itinerary and have policies are shown in the **Reviewer** section.

2. For each country it displays who approved, denied and the reviewers on the policy.
3. If an itinerary was previously approved by system and a new policy is added for a country, it will show “System” once the policy is added to a country.
4. If an itinerary is auto-approved or denied with a policy, it shows “By policy”.

Export Itineraries List

You can export the list of itineraries to a CSV file. In the export, when an itinerary has more than one traveler, a row for each traveler is displayed with their First Name, Last Name and External ID. In addition, the Source and Cost Center associated with the itinerary are also exported.



Importing Travel Itineraries

Importing your Travel Itineraries is an important first step in fulfilling your duty of care obligations. To assist with this, Everbridge provides three ways to bring in travel itinerary information:

- **Travel Location Data Feeds** - Everbridge can connect to all major travel management companies, online booking tools, global distribution systems, and aggregators to obtain Itinerary information via an API or connector.

- **Email Parsing** - Everbridge can capture off-channel bookings to provide a holistic duty of care. Travelers can forward an email and the email will be parsed as a Travel Itinerary, creating an expected location in the Everbridge platform. Travelers should ensure the email address and mobile number they will be using on the trip are included in the booking.
    - Note that Email Parsing is a paid add-on for Travel Protector.
- **Manual Import** - You can import Itineraries manually from a spreadsheet using a desktop utility. See Manually Importing Itineraries for instructions.

Once imported, the itineraries can be viewed and exported from the Itineraries page. You can access Itinerary Audit Logs by navigating to **Contacts+Assets** > **Contacts** > **Travel Connector and API Logs.**

Manually Importing Itineraries

You can import itineraries manually from a spreadsheet using a desktop utility. Once you have prepared your itineraries data in a spreadsheet, you will need to download the utility then launch it locally and import the data from the spreadsheet.

The following information can be loaded using the import utility:

- Itinerary
- Traveler
- Flight
- Car
- Hotel
- Train

Type	Field	Required?	Description
Itinerary	ID	Optional	Internal ID for the PNR (external itinerary ID).
	PNR	Required	PNR or Record location number.
	Status	Required	Status of the PNR in the source system. New, Canceled (itinerary will be deleted), Update, Active.
	Creation Time	Optional	Date and time the itinerary was created in the source system.
	Note	Optional	Additional notes.
Traveler Information	Contact ID	Optional	Existing Everbridge Contact ID.
	Employee ID	Optional	Will be matched to existing Contact External ID. If not filed, a temporary external ID of format tmpid-<first

			name>-<last name> will be assigned to the contact upon creation.
	First Name	Required	Contact first name.
	Middle Name	Optional	Contact middle name.
	Last Name	Required	Contact last name.
	Email Address	Required	Contact email address.
	Phone Number	Optional	Contact phone number.
	Note	Optional	Additional notes.
Flight	Airline	Required	Name of the airline.
	Airline Code	Required	IATA Airline code.
	Flight #	Required	Flight number.
	Departure Airport Code	Required	IATA Airport code.
	Departure Time (Local)	Required	Departure date and time in local time.
	Arrival Airport Code	Required	IATA Airport code.
	Arrival Time (Local)	Required	Arrival date and time in local time.
	Note	Optional	Additional notes.
Hotel	Hotel Name	Required	Name of the hotel.
	Address	Required	Address of the hotel.
	City	Required	City where the hotel is located.
	State	Optional	State where the hotel is located. This is a required field for US and Canada.
	Country	Required	Country where the hotel is located.

	Postal Code	Optional	ZIP code of the hotel address.
	Time Zone	Required	Time zone where the hotel is located.
	Check-in Time (Local)	Required	Date and time (in local time) when the traveler will check in.
	Check-out Time (Local)	Required	Date and time (in local time) when the traveler will check out.
	Note	Optional	Additional notes.
Car	Rental Agency	Required	Name of the rental car agency.
	Pickup Air/Rail Code	Optional	IATA code of the pickup location. If no IATA code exists, specify the address of the pickup location using the fields below.
	Pickup Address	Required	Address where the car is picked up. Will be used if no or invalid location code is provided.
	Pickup City	Required	City where the car is picked up. Will be used if no or invalid location code is provided.
	Pickup State	Optional	State where the car is picked up. Will be used if no or invalid location code is provided.
	Pickup Country	Required	State where the car is picked up. Will be used if no

			or invalid location code is provided.
	Pickup Postal Code	Required	City ZIP code where the car is picked up. Will be used if no or invalid location code is provided.
	Pickup Time (Local)	Required	Date and time (in local time) when the car will be picked up.
	Drop-off Location (Airport Code)	Optional	IATA code of the pick-up location. If no IATA code exists, specify the address using the fields below.
	Drop-off Address	Required	Address where the car is dropped off. Will be used if no or invalid location code is provided.
	Drop-off City	Required	City where the car is dropped off. Will be used if no or invalid location code is provided.
	Drop-off State	Optional	State where the car is dropped off. Will be used if no or invalid location code is provided.
	Drop-off Country	Required	Country where the car is dropped off. Will be used if no or invalid location code is provided.
	Drop-off Postal Code	Required	City Zip code where the car is dropped off, will be used if no or

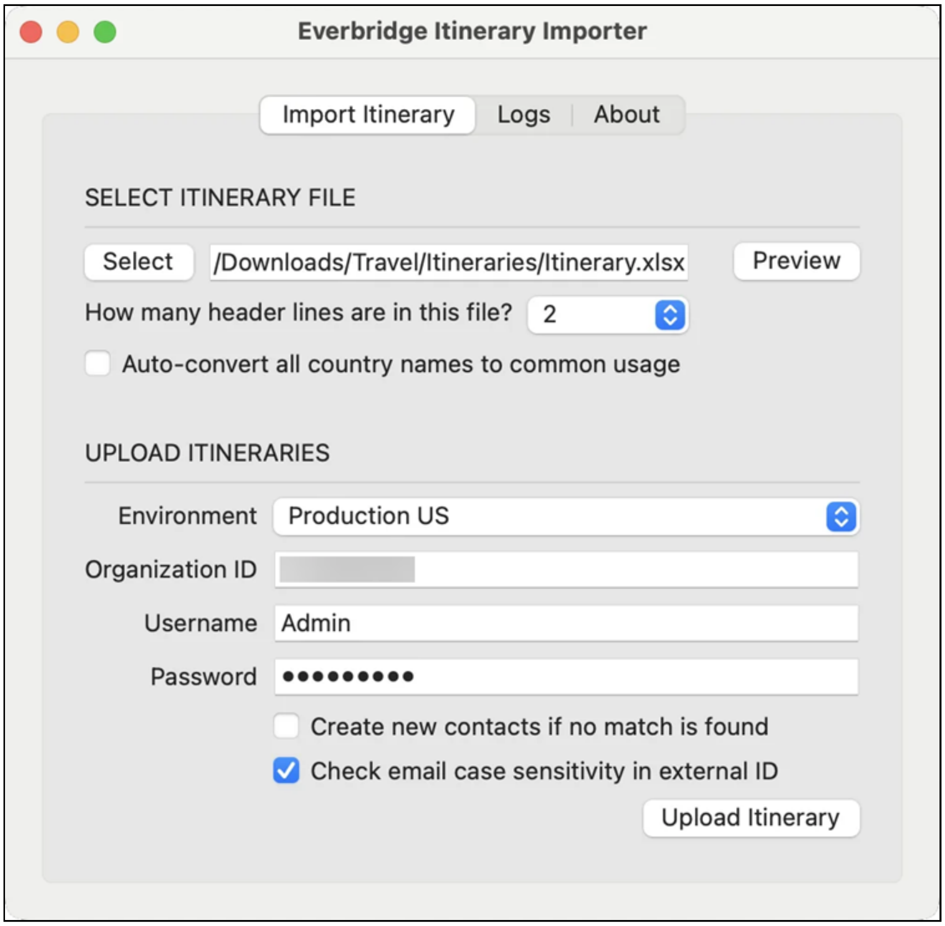
			invalid location code is provided.
	Drop-off Time (Local)	Required	Date and time (in local time) when the car will be returned.
	Note	Optional	Additional notes.
Train	Railway Company	Required	Name of the train provider.
	Train Code	Required	Code identifying the train.
	Train Number	Required	Train number.
	Departure Station Code	Required	IATA Train station code. If no IATA code exists, specify the nearest IATA code.
	Departure Address	Required	Train station address. Will be used if no or invalid location code is provided.
	Departure City	Required	Train station city. Will be used if no or invalid location code is provided.
	Departure State	Optional	Train station state. Will be used if no or invalid location code is provided.
	Departure Country	Required	Train station country. Will be used if no or invalid location code is provided.
	Departure Postal Code	Required	Train station City ZIP code. Will be used if no or invalid location code is provided.

	Departure Time Zone	Required	Time zone of the departure station.
	Departure Time (Local)	Required	Date and time (local time) of departure.
	Arrival Station Code	Required	IATA Train station code. If no IATA code exists, specify the nearest IATA code.
	Arrival Address	Required	Train station address. Will be used if no or invalid location code is provided.
	Arrival City	Required	Train station city. Will be used if no or invalid location code is provided.
	Arrival State	Optional	Train station state. Will be used if no or invalid location code is provided.
	Arrival Country	Required	Train station country. Will be used if no or invalid location code is provided.
	Arrival Postal Code	Required	Train station ZIP code. Will be used if no or invalid location code is provided.
	Arrival Time Zone	Required	Time zone of the arrival station.
	Arrival Time (Local)	Required	Date and time (local time) of arrival.
	Note	Optional	Additional notes.

Importing an Itinerary

To import an Itinerary:

1. Navigate to **Contacts+Assets** > **Contacts** > **Travel Connector and API Logs.**
2. Select **Add Itinerary**, which will route the user to the [Travel Itinerary Importer](#) page.
3. Follow the instructions outlined on the Travel Itinerary Importer page.



How an Itinerary is Interpreted

When a new Itinerary is added, the following operations are performed:

- Travelers included in the Itinerary are matched to existing contacts in Everbridge.
- A travel segment and expected locations are created for each portion of the traveler's trip. The type of each segment and travel location are calculated. Start and end dates for each travel location are calculated based on Expected Location Duration Settings.

Travel and expected locations represent where your traveler is located on the map. If a Risk Event occurs, travelers who have an active location in the area will be identified as affected by the Risk Event and will be notified based on the rule you defined in the system.

The sections that follow describe the rules for each of these actions.

Traveler to Contact Matching Logic

When an Itinerary is created in Everbridge Suite, travelers included in the Itinerary will be matched to existing contacts in Everbridge. This is necessary, as only contacts can receive incident communications. Matching is done using these rules:

If a **contactID** or **Employee ID** is specified during the upload, it will be used. As those are unique IDs in Everbridge, no other information is used for matching. Traveler information in the Itinerary (Name, Email Address, etc.) is ignored in favor of information in the existing Contact Record.

If no contactID or EmployeeID is specified during the upload, other traveler information will be used to match the traveler to an existing contact, in this order:

1. If the First Name and Last Name match exactly (without trimming punctuation):
    - The contacts for which the Email or Phone Number matches are selected.
    - The contacts for which the Middle Initial matches are selected.
2. If the Last Name only matches and the start of First and Middle Names match (with trimming punctuation):
    - The contacts for which the Email or Phone Number matches are selected.

   - The contacts for which the longest number of characters matches at the start of first and middle names are selected.
3. If the First word of the First Name, Last Name matches (with trimming punctuation) and the start of the First and Middle Names matches (with trimming punctuation,)
   - The contacts for which the Email or Phone Number matches are selected.
   - The contacts for which the longest number of characters matches at the start of first and middle names are selected.

If no contact match is found, and the **Create contact** option is selected, a new contact will be created for the traveler.

When a contact is created for the traveler, the information (First Name, Last Name....) specified in the Itinerary is used. In addition, as both External ID and contact types are required fields for contacts:

- If an Employee ID is specified during the import, it will be used as the External ID and the record type is set to **Employee**.
- If no Employee ID is specified during the import, an external ID of format **tmpid-<first name>-<last name>** is assigned to the newly created contact, and the record type is set to **Temporary Traveler**.

Both External ID and Record Type fields can be changed at any time on the contact detail page; see Defining Traveler Types.

Travel Segment and Travel Location Types

When an Itinerary is loaded in Everbridge, segments are created for each portion of the trip. Each segment has a "**Departure**" and an "**Arrival**" specified, along with dates. Travel locations–expected locations with the type Travel—will be created for the Arrival and Departure of each segment.

Additional information about the segments will be calculated based on the expected travel locations:

- **International**: A segment is International if the Departure and Arrival locations are in **different** countries
- **Domestic**: A segment is domestic if both the Departure and Arrival locations are in the **same** country.

A travel location can have additional attributes depending on the traveler's static location:

- **Local**: A travel location is local if the distance between **any** of the contact's Static address(es) and location **is within** a 100-mile radius.
- **Non-Local**: A travel location is non-local if the distance between **each** of the contact's Static address(es) and location **is more** than 100 miles.
- **Domestic**: A travel location is domestic if **Any** of the contact's static address(es) has the same country as the location.
- **International**: A travel location is international if **None** of the contact's static address(es) has the same country as the location.

For example:

- A traveler residing in Australia is traveling in the USA from Boston to Denver. The segment will be Domestic but each travel location for that specific traveler will be International and non-local.
- A traveler residing in Luxemburg is traveling across the border to Metz, France. The segment will be International, but each travel location will be local.

> **NOTE:** If a traveler has no static location defined in Everbridge, its travel location type will be marked as Unknown.

Location Duration Settings

Travel locations are created whenever Itineraries are imported. For train trips, flights, and car rentals, two travel locations are created for each travel segment. For hotel segments, only one travel location is created for the duration of the stay.

By default, travel locations created from Itineraries take effect **24 hours** before the traveler is scheduled to arrive at the location and remain valid for 24 hours after the traveler is expected to arrive.

- A traveler is scheduled to take a flight at 9 a.m. on April 1. For purposes of visualization and alerting, the traveler is considered to be at the airport starting at 9 a.m. on March 31 (24 hours before the scheduled time for the flight).
- The same traveler is scheduled to arrive at the flight destination at 3 p.m. on April 1. The traveler is considered to be at that location until 3 p.m. April 2 (24 hours after the expected arrival date and time), unless another travel segment exists in that period.

These 24-hour periods allow Everbridge to notify travelers, travel managers, and others about events that may affect travelers. For example, if a weather event shuts down the departure airport before a traveler’s flight, the traveler and manager will want to know about the disruption before the traveler goes to the airport. If a natural disaster occurs at the destination after the traveler's flight, the travel manager may need to know, as the traveler may still be in the area.

These 24-hour periods are defaults; you can adjust the durations used for different types of expected locations on the Defaults page in the Manager Portal, at **Settings** > **Organization** > **Map** > **Location Data Sources** > **Defaults.**

Locations generated from travel segments may overlap with each other. For alerting and visualization purposes, the traveler is treated as being in all overlapping locations at the same time.

The rules to calculate the start and end dates of each expected location are as follows:

Setting	Value	Rule
Hotel Check-in	Off	The expected location starts on the check-in date/time found in the Itinerary segment minus 24 hours.
	On and set to a length of time	The expected location starts on the check-in date/time found in the Itinerary segment minus the length of time specified.
	On and set to a point in time	The expected location starts on the check-in date and time specified in the setting.
Hotel Checkout	Off	The expected location ends on the check-in date/time found on the Itinerary segment plus 24 hours.
	On and set to a length of time	The expected location ends on the check-in date/time found on the Itinerary segment plus the length of time specified.

	On and set to a point in time	The expected location ends on the checkout date and time specified in the setting.
Flight Departure	Off	The expected location starts on the flight departure date/time found in the Itinerary segment minus 24 hours and ends on flight departure date/ time at the departure airport.
	On	The expected location starts on the flight arrival date/time found in the Itinerary segment and ends on the flight arrival date/time found in the Itinerary segment plus the length of time specified in the setting at the destination airport. An additional rule may be applied if the Max Flight/ Train connection setting is used.
Flight Arrival	Off	The expected location starts on the flight arrival date/time found in the Itinerary segments and ends 24 hours later at the destination airport.
	On	The expected location starts on the flight arrival date/time found in the Itinerary segment and ends on the flight arrival date/time found in the Itinerary segment plus the length of time specified in

		the setting at the destination airport. An additional rule may be applied if the Max Flight/ Train connection setting is used.
Train Departure	Off	The expected location starts on the train departure date/time found in the Itinerary segment minus 24 hours and ends on train departure date/ time at the departure station.
	On	The expected location starts on the train departure date/time found in the Itinerary segment minus the length of time specified in the setting and ends on train departure date/time at the departure station. An additional rule may be applied if the Max Flight/ Train connection setting is used.
Train Arrival	Off	The expected location starts on the train arrival date/time found in the Itinerary segments and ends 24 hours later at the destination station.
	On	The expected location starts on the train arrival date/time found in the Itinerary segment and ends on the train arrival date/time found in the Itinerary segment plus the

		length of time specified in the setting at the destination station. An additional rule may be applied if the Max Flight/ Train connection setting is used.
Car Rental Check-in	Off	The expected location starts on the car rental check-in date/time found in the Itinerary segment minus 24 hours and ends on the car rental check-in date/time.
	On	The expected location starts on the car rental check-in date/time found in the Itinerary segment minus the length of time specified in the setting and ends on the car rental check-in date/time.
Car Rental Return	Off	The expected location starts on the car rental return date/time found in the Itinerary segments and ends 24 hours later
	On	The expected location starts on the car rental return date/time found on the Itinerary segment and ends on the car rental date/time found on the Itinerary segment plus the length of time specified in the setting.
Others	Off	Reserved for future use.
	On	Reserved for future use.
Max Flight/Train connection	Off	No rule is applied.

	On	If the time difference between two train or two flight segments is less than the Max Flight/Train Connection time setting and the airports/train stations are the same, only one expected location is created from the date/time arrival of the first flight/train to the next flight/train date/time departure.

Maintain Traveler at their Last Known Location

In some situations, there may be a gap between two travel locations generated from two successive travel segments. Consider the example below:

- A traveler is arriving at a destination in the morning and (based on the organization’s configuration for Air and Rail arrivals) is only considered to be at the arrival airport or train station for a few hours and then is checking in to their hotel later in the evening. In this case, there is no expected location for the period after the end of the Flight or Rail arrival location and before the beginning of the hotel location.

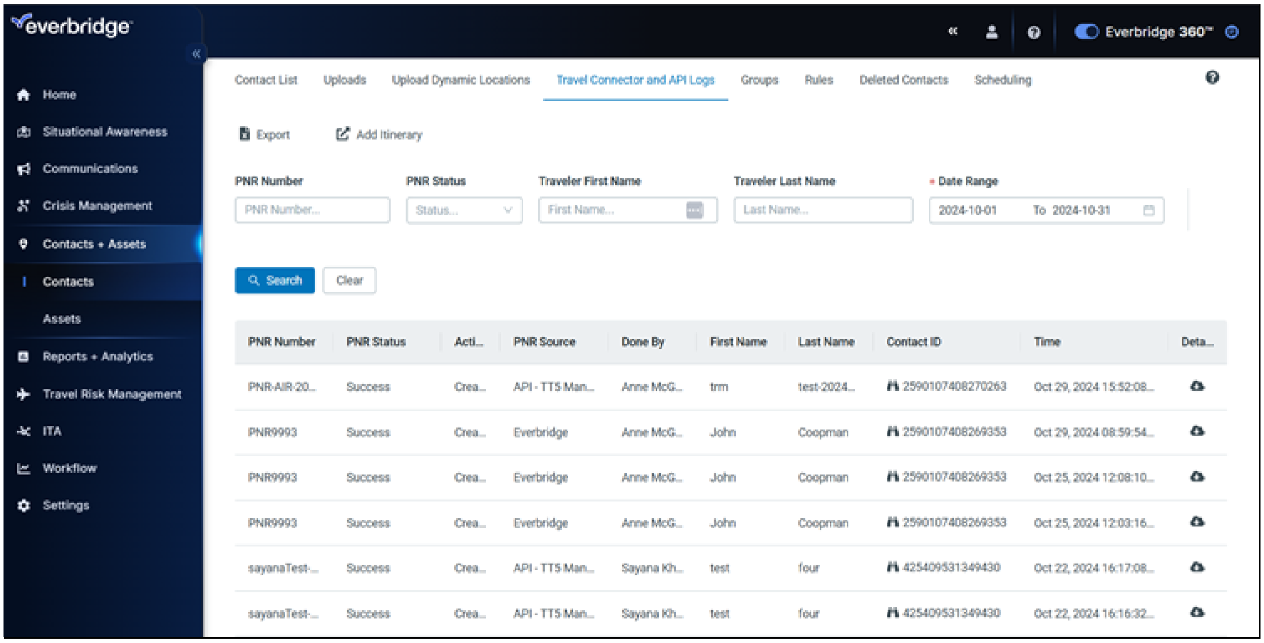
In this situation, the system will not be able to locate the traveler; if any local event is occurring during these gaps, the traveler will not be alerted. To avoid such a situation, use the setting **Maintain traveler at their last expected location** located on the Defaults page at **Settings** > **Organization** > **Map** > **Location Data Sources** > **Defaults.**

With this setting enabled, the traveler is treated as being at their last travel location until the next one becomes active. On the last segment of the Itinerary, this setting is not applied.

NOTE: This setting applies only to locations created from segments of the same Itinerary.

Itinerary Audit Logs

Any Itineraries loaded using the Itinerary Importer utility, Travel Data connector, or the API are logged. To view the logs, navigate to **Contact+Assets** > **Contacts** > **Travel Connector and API Logs**.



By default, no Itineraries are displayed in the table. Itineraries are displayed based on search criteria.

You can search by **PNR Number**, **PNR Status**, **Traveler First** or **Last Name**, and **Date Range**. Search results must match all the criteria. By default, the Date Range specified in the search is the past seven days. You can search for imports up to 18 months in the past, but you cannot specify a date range longer than six months. The following information will be returned in the log:

Field	Description
PNR Number	Record locator or PNR number for the Itinerary.
PNR Status	**Success** – The Itinerary has been loaded successfully with all the information. **Partial Success** - Some travelers were rejected; others were created or matched.

	Failure – The Itinerary was rejected. The reason for failure or partial success is available by selecting the binoculars icon.
Action	Event action.
PNR Source	Indicates the name of the third-party system where the PNR originated, or whether it has been loaded via API or using the Everbridge utility.
Done By	Name of the Everbridge user who did the action.
First Name	Traveler first name (one line per traveler).
Last Name	Traveler last name (one line per traveler).
Contact ID	Everbridge Contact ID for the traveler. Details on how the traveler was matched to an existing contact or whether the contact was created (no match found) are displayed by selecting the binocular icon.
Time	Time of the transaction.
Details	Downloads the details of the Itinerary in a JSON format.

You can export the content of the table along with the failure details and Contact matching details by selecting the **Export** button above the table.

Data Retention

Travelers

Temporary Travelers (contacts with record type "Temporary Traveler") will be kept in the system for **90 days** after the end of their latest Itinerary. If the record type of the traveler was changed, it will not be deleted.

If the Temporary Traveler does not have any Itinerary in the system (the Itinerary was canceled and deleted), the Temporary Traveler contact record will be deleted 90 days after it was created or modified.

Travel Itinerary Data

By default, the retention time for travel itineraries is **18 months** after the Itinerary ends. However, if enabled, data retention for the Organization's travel data can be customized under **Settings** > **Map** > **Location Data Sources** > **Data Retention Policy**. You can change it to any duration from one to 18 months or one to 29 days.

The Travel Itineraries and all their segments will be deleted after the specified duration once the travel is completed.

Booking Alerts

Booking Alerts allow sending Incident Notifications using Incident Templates when a traveler books a trip that matches a selected set of conditions. Travel managers or any authorized user can configure a set of rules to alert when a defined set of travelers book a trip to a Country Risk Level, to some or all Country Risk Levels, or to a specific set of countries.

Using Booking Alerts requires the following steps:

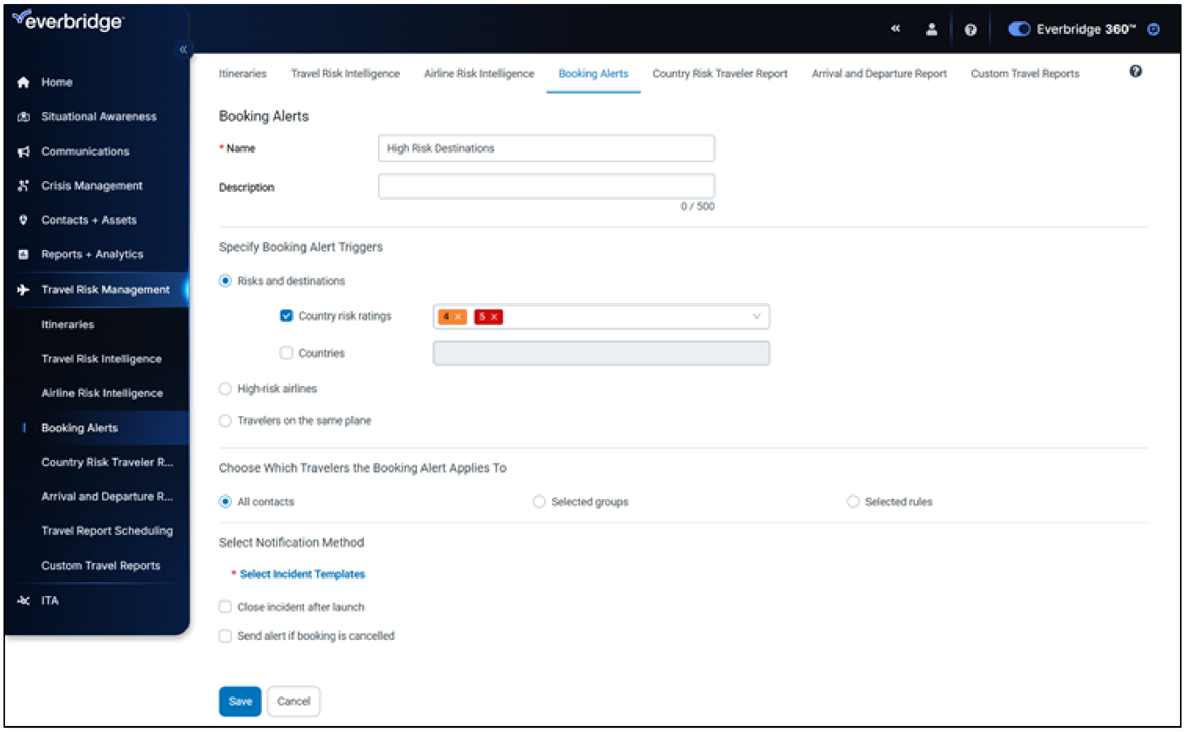
1. Create an Incident Template to be used when sending alerts.
2. Ensure that **Edit** permissions for messages are granted in the template.
3. Set up the Booking Alerts rule.
4. Import itineraries.
5. Monitor the Booking Alerts.

NOTE: Booking Alerts are not sent to the traveler but to the defined contacts in the Incident Template. There must be at least one contact included in the template for the Incident to be launched.

Configuration

To configure Booking Alerts, navigate to **Travel Risk Management** > **Booking Alerts**.

1. Select **Add New Alert Rule** in the top-right corner.
2. On the Booking Alerts page, specify the **Name** (required, up to 100 characters), and **Description** (optional, up to 500 characters).
3. Specify the Booking Alert **triggers**. They can be triggered by **Risks and destinations**, by **High-risk airlines**, or by **Travelers on the same plane**.



a. **Risks and destinations** - A Booking Alert is triggered when the traveler is booking to a country that matches all the selected criteria:
   - **Country risk ratings** - A Booking Alert is triggered when a traveler is booking a trip to a country of any of the selected Country Risk Ratings. If a custom risk rating has been set for a country, it will be used.
   - **Countries** - A Booking Alert is triggered when a traveler is booking to any of the selected countries.
   - If both **Country risk ratings** and **Countries** are selected, a Booking Alert is triggered when any of the selected countries matches any of the selected risk levels.
   - **NOTE:** Booking Alerts by Risks and destinations only include countries that the traveler is **traveling to**. The country of origin will not trigger a Booking Alert.

b. **High-risk airlines** - A Booking Alert is triggered when the traveler is booking on an airline that matches all the selected criteria.
   - **Airline risk ratings** - Traveler books a trip on an airline of any of the selected risk ratings. If a custom risk rating has been set for an airline, it will be used.

        - **FAA country category** - Traveler books a trip on an airline headquartered in a country that matches the selected country category set by the FAA. Visit www.faa.gov for more information.
            - **Category 1** - Complies with ICAO Standards. FAA inspectors assessed a country's civil aviation authority and determined that it licenses and oversees air carriers in accordance with ICAO aviation safety standards.
            - **Category 2** - Does Not Comply with ICAO Standards. FAA inspectors assessed a country's civil aviation authority and determined that it does not provide safety oversight in accordance with ICAO standards.
            - **Not Categorized** - The country has not been categorized by the FAA.
        - **IOSA not registered** - Traveler books a trip on an airline that is not an IOSA-registered operator. For more information, visit www.iata.org.
        - **On EU banned list** - Traveler books a trip on an airline banned from operating in Europe. For more information, visit https://transport.ec.europa.eu.
        - **On custom banned list** - Traveler books a trip on an airline on your own defined banned list set under Airline Risk Intelligence.
    c. **Travelers on the same plane** – Booking Alert is triggered when the number of travelers booking on the same plane is approaching, reaching or exceeding the defined thresholds. The Notification contains the flight information, including the list of passengers booked on the plane. In the case of code-sharing, passengers are identified as being on the same plane for an Air segment if all of the following matches: departure time, arrival time, departure airport code, and arrival airport code.
        - **Maximum travelers allowed** - When the number of travelers reaches or exceeds the defined number, an Incident Notification is sent using the template defined in the Booking Alert.
        - **Alert when reaching** - When the number of travelers reaches or exceeds the defined number but is less than the Maximum number of travelers allowed, an Incident Notification is sent using the template defined in the Booking Alert.
4. Select Travelers for which the Booking Alert will apply. You can select all **Contacts**, Contacts from selected static **Groups**, or Contacts from selected **Rules**. To create Rules and Groups please refer to the Incident Communications User Guide. Dynamic Group selection is not supported at this time.
5. Select the Notification method. Select one or multiple templates to be used to send the Booking Alert Incidents. A single Incident is launched per selected

template. The Incident Notification is sent to the Contacts set in the templates.
6. You have the option to automatically close the Incident(s) after successfully launched. This will apply to all Incidents of the current Booking Alert Rule.
7. You can choose to send a cancellation alert for Risks and Destinations. A cancellation alert is sent when a segment in an itinerary that previously triggered a booking alert is deleted or its dates or destinations are updated.
8. Select **Save**.

You can configure up to **200 Booking Alerts per Organization**.

The Booking Alert rule is automatically enabled after creation. You can disable any Booking Alert rule at any time by deselecting them in the table, and Incidents will no longer be created. Furthermore, Booking Alerts can be deleted if no longer needed.

Incident and Message

When a Booking Alert is sent, a single Incident is launched per template per rule (regardless of the number of Risk Ratings or countries specified as triggers).

By default, the message defined in the Incident Template is appended with a predefined section, the content of the message depends on the type of booking alert triggered.

- For **Risk and destination**, it includes the traveler's information (last name, first name, external ID, and record type), along with the arrival information (PNR number, itinerary type, arrival city, date, location, and segment type). If more than one arrival location triggered a Booking Alert, they are grouped by country; country name, risk rating, and risk rating label are indicated. The message is truncated if it exceeds the limit defined in the Incident Template.
- For **High-risk airlines**, it includes the traveler's information (last name, first name, external ID, record type) along with the flight information (flight number, departure airport, departure date, arrival airport, arrival date, and PNR number). If more than one airline triggers a booking alert, they are grouped by airlines; airline name, risk rating, and risk rating label are indicated. The message is truncated if it exceeds the limit defined in the Incident Template.
- For **Travelers on the same plane**, it includes the flight information (flight numbers, departure airport, departure date, arrival airport, and arrival date) along with the list of passengers on the plane (last name, first name, external ID, record type and PNR number)

Travel Protector can auto-fill the predefined section using system variables so you can move the predefined section anywhere in your message.

Variable	Type	Description
_Travel: Booking Alert Message	Autofill	The predefined section in text format. To be used for SMS.
_Travel: Booking Alert Message - HTML	Autofill	The predefined section in HTML format. To be used for mobile and custom email.

If both **_Travel: Booking Alert Message – HTML** and **_Travel: Booking Alert Message** are used in the message, **_Travel: Booking Alert Message** will be auto-filled by the predefined section in the SMS message and **_Travel: Booking Alert Message – HTML** will be auto-filled by the predefined section in the mobile and custom email.

If none of the system variables are used, the predefined section will automatically be added at the bottom of the message.

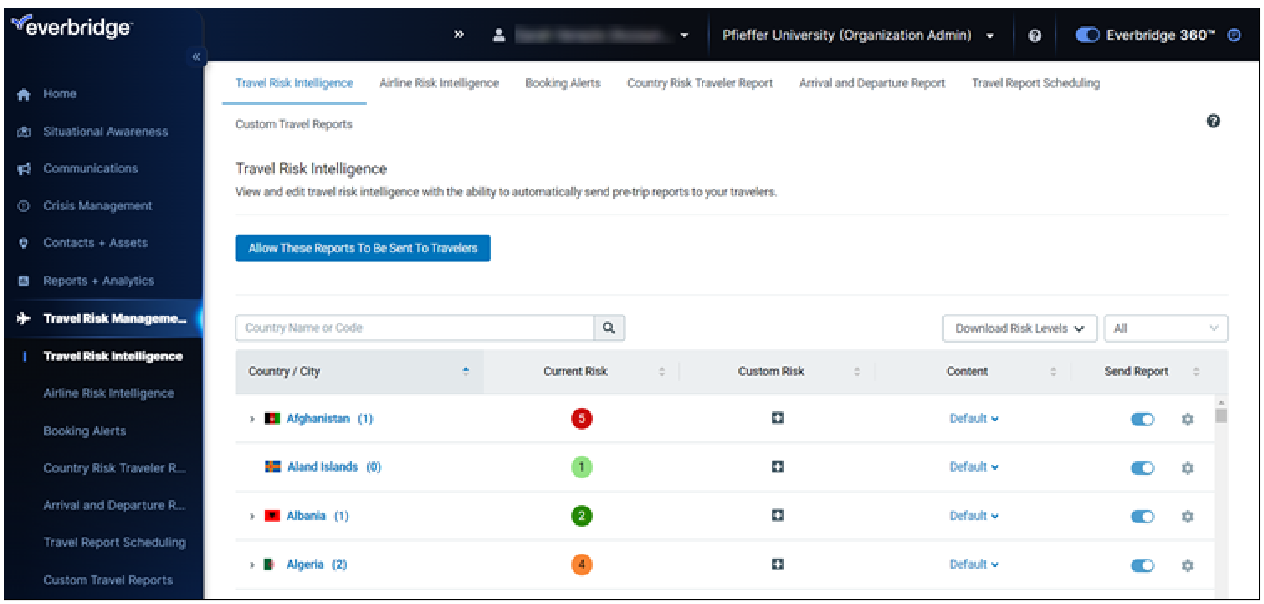
Travel Risk Intelligence

Country and City Reports are designed to educate and inform a traveler about the risks of travel after booking a reservation, as well as provide educational information about country etiquette, holidays, customs, and pertinent information needed to ensure a successful business trip.

Everbridge Risk Intelligence Monitoring Center (RIMC) provides details for each country and region, along with their main cities. Updated regularly, it can be used for pre-trip country reports.

> **NOTE:** The Everbridge RIMC information is provided "as is" and may not be up-to-date as the situation in some countries may change quickly.

The Travel Risk Intelligence page is used to customize Country and City Report content, customize Travel Risk Ratings, select countries for which a Pre-Trip Country Report is sent to travelers, and configure your pre-trip advisories.



Configuring Intelligence Reports

The country and city-specific data sent to travelers is comprised of two parts:

- **Everbridge Default Content** is contextual data delivered for each country and main cities through RIMC.
- **Custom Content** can be set up for each country and city. Custom Content is added at the beginning of the intelligence report. It can provide additional

company-specific details such as office locations, contact names and numbers, maps, advice on hotels and transportation, and so forth.

For **Countries**, the default content includes the following categories:

- **Country Risk Rating**: Overall Risk Level on a scale from 1-5.
- **Entry Requirements:** A link to the latest information provided by Sherpa.
- **Pre-Trip Information:** Important general information about the country.
- **Overview**: Security overview, including the latest significant events of the past few years.
- **Arrival/Departure**: Lists all documents such as visa and vaccinations needed to enter or exit the country or region.
- **Business**: Provides an overview of business hours, time zone(s), the currency used, financial crime, and outlet information.
- Main phone emergency number and US diplomatic representation details.
- **Ground Transportation**: Lists available ground transportation possibilities along with recommendations for each of them.
- **Health/Medical**: Provides in-depth health and natural disaster risks and recommendations for this country or region along with a list of available hospitals and health care facilities.
- **Crime/Security**: Exposes the security risks existing in the country such as crime, civil unrest, trafficking, or terrorism.

For **Cities,** the default content includes the following categories:

- **City Risk Rating**: Overall risk level on a scale from 1-5.
- **Overview**: Important general information about the city.
- **Orientation**: Geographic description of the city.
- **Security**: Security overview, including the latest significant events of the past few years.
- **Crime**: Exposes the risks related to crime existing in the city.
- **Civil Unrest**: Exposes the risks related to civil unrest specific to the city.
- **Emergency Services**: Main phone emergency numbers and diplomatic representation details.
- **Port of Entry**: Important information about the nearest airport(s).
- **Transit from Airport**: General information about ground transportation and access to the city from the airport.
- **Ground Transportation**: Lists available ground transportation possibilities along with recommendations for each of them.

Editing Country or City Intelligence Content

For any country or city, the content of the Intelligence Report can be adjusted. In the table, you can expand the country to view the list of cities for which intelligence is provided.

To create custom content:

1. Open the drop-down list in the **Content** column, select the **Custom** checkbox, and click the **Pencil** icon.
2. Type and format the text to be added using the rich text editor.
3. Select your Content Settings. For each country or city, you can select either/or the combination of:
    - **Include Default content**: The background intelligence data about the country or city will be the one provided by Everbridge RIMC.
    - **Include Custom content**: Your custom content is displayed along with Everbridge Header and Footer. Optionally, you can remove the Everbridge Header and Footer by selecting the Hide Default Header and Footer option. This allows you to fully replace the content with your own.
    - **Include both Default and Custom content**: The custom content will be added between the Everbridge header and the background intelligence data provided by Everbridge RIMC.
4. Click **Save** and repeat the custom content creation for all countries and cities where it is needed.

Country/City Risk Rating

The Risk Rating provided for each country, region or city ranges from 1 to 5, as defined below. Risk Ratings are provided automatically by Everbridge RIMC. You can override the Risk Rating for any country or city by selecting the **+** action in the **Custom Risk** column and selecting a new rating. This new custom rating will be displayed in the Pre-Trip Country Report until it is changed or removed.

- **Level 1** – Very Low Risk: Travelers should be aware and briefed on their own personal security.
- **Level 2** - Low Risk: Travelers should be made aware of the current situation and exercise a degree of caution and self-awareness.
- **Level 3** - Moderate Risk: Exercise a high degree of caution. Ensure the traveler has been briefed in regard to the destination and their personal safety and security.
- **Level 4** - High Risk: Essential travel only. Assess, evaluate, and take appropriate action to ensure the safety and security of the traveler. If travel is deemed essential, ensure that additional protective security measures are in place.
- **Level 5** – Extreme Risk: Do not travel unless robust protective security measures are in place to meet specific threats and to minimize vulnerability and risk to the traveler.

Changes to Country and City Risk Ratings are recorded in the system. You can view when the current and custom Risk Ratings were changed by hovering the cursor over the **Risk Rating** icon. A tooltip will indicate the previous value, the current value, and when it was last changed. For custom risks, it will also indicate who changed it.

You can also download the list of countries, cities, or both to a CSV file. The file includes the list of current overall and custom risk levels, the previous value, the date of the change, and who made the change.

Viewing Intelligence Reports

Click the country or city name at any time to display the report.

Setting Up the Pre-trip Country Reports

Setting up Pre-trip Country Reports first requires the following steps:

1. Create an Incident template to be used when sending messages to travelers.
2. Ensure that Operation Edit permissions for messages and contacts are granted in the template.
3. Set up the Pre-Trip Country Reports.
4. Import itineraries.
5. Monitor the pre-trip Notifications.

Once the above steps are completed, to configure Pre-trip Country Reports:

1. From the **Settings** tab, select **Organization** > **Travel Risk Management** > **Travel Risk Intelligence**. The list of countries for which Pre-Trip Reports can be sent is displayed in a table. By default, the list is sorted alphabetically.
2. Above the table, select **Allow These Reports To Be Sent To Travelers** to the default Incident template used for the Notification.
3. Select the wheel icon to set the sending options per country. Sending options include:
    a. Specify a different Incident template for the countries of your choice. You can use one template per country.
    b. Incidents will be automatically closed after launch by default. You can opt to keep it open for a specific country by deselecting the country's flag.
    c. Set an attachment you want to add to the Pre-Trip Country Report Notification. You can add a single attachment of 10MB maximum per country.

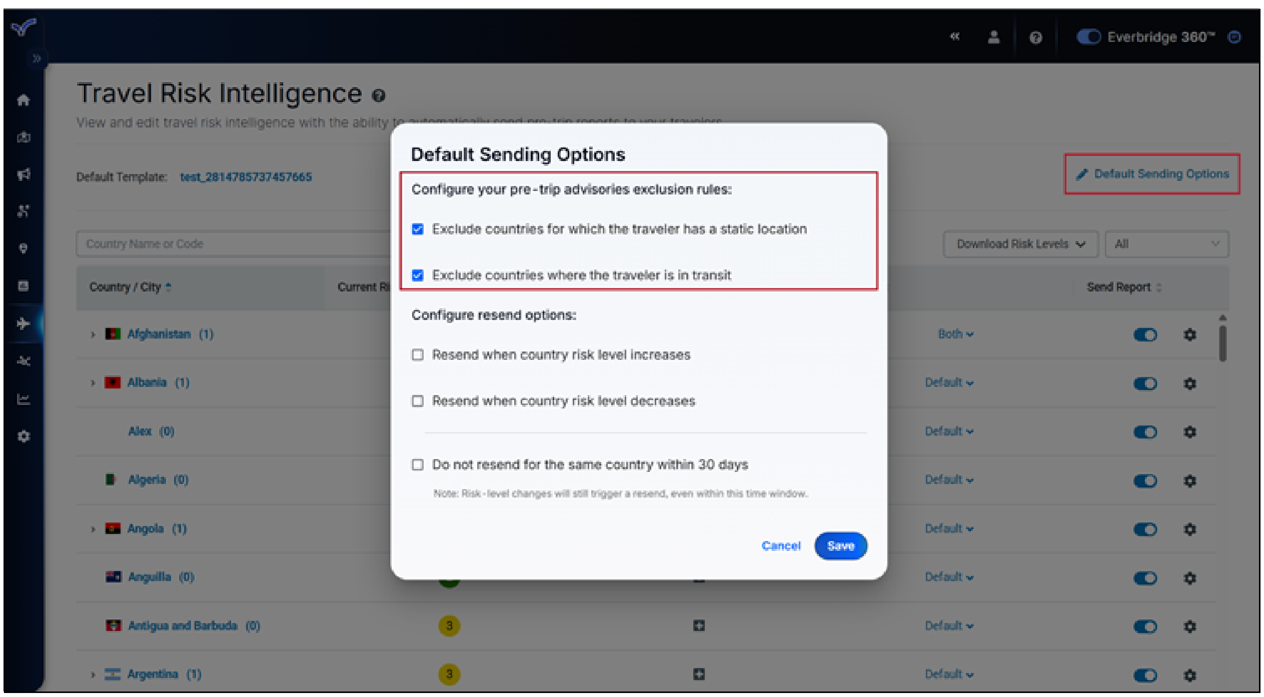
4. In the country list, enable the countries for which a Pre-Trip Country Report will be sent. Note that you can filter countries by region or sort them by Risk Rating or names by clicking those column titles.

Email, push Notification (mobile), and SMS delivery methods are supported for sending Pre-Trip Country Reports with the option for acknowledgment. The Incident templates must be configured to restrict sending messages only to one or both delivery methods.

Sending Pre-Trip Country Reports

Pre-Trip Country Reports for the defined countries are sent to travelers within one hour of their itinerary being created or updated in Everbridge. If the itinerary includes multiple countries, an Incident Notification will be sent for each country for which a Pre-Trip Report has been configured to be sent.

Users can configure pre-trip advisories exclusion rules by selecting **Default Sending Options** and choosing which exclusion rule will apply to your Organization. Changes apply immediately to all itineraries received moving forward.



The following exclusion rules apply by default:

- Exclude countries for which the traveler has a static location
- Exclude countries where the traveler is in transit

Users can also enable the **Do not resend for the same country within 30 days** option to prevent resending a country report for the same country more than once within a 30-day period.

When the Pre-Trip Country Report is sent, a section is automatically added at the bottom of the message defined in the Incident template and includes:

- **Mobile and custom Email messages (HTML format)**
  Country: <name of the country> - Risk: <country risk rating>-<risk label>
  Confirmation #: <PNR number>
  Traveler: <first and last name of the traveler>

  The <name of the country> - Risk: <country risk rating> is hyperlinked to the country-specific report. Selecting this link will open the country report as an HTML page.
- **SMS (text format)**

  Country: <name of the country> - Risk: <country risk rating>>-<risk label>
  Report: <link to the country report>
  Confirmation #: <PNR number>
  Traveler: <first and last name of the traveler>

Incident templates can be created with different variables to personalize the communication that is sent to travelers. Travel Protector can autofill the first and last name of the traveler along with the predefined section. Variables prefixed by **_Travel:** will be autofilled by Travel Protector.

Variable	Type	Description
_Travel: Contact First Name	Autofill	The first name of the traveler.
_Travel: Contact Last Name	Autofill	The last name of the traveler.
_Travel: Travel Intelligence Message	Autofill	The predefined section in text format. To be used for SMS.
_Travel: Travel Intelligence Message - HTML	Autofill	The predefined section in HTML format. To be used for mobile and custom email.

If both **_Travel: Travel Intelligence Message – HTML** and **_Travel: Travel Intelligence Message** are used in the message, **_Travel: Travel Intelligence Message** will be autofilled by the predefined section in the SMS message, **and _Travel: Travel Intelligence Message – HTML** will be autofilled by the predefined section in the mobile and custom email.

If none of the four system variables are used, the predefined section will automatically be added at the bottom of the message.

Resending Pre-Trip Country Reports when Risk Rating Changes

If configured, a pre-trip country report can be resent to all travelers with active itineraries planned for a country whenever that country's Risk Rating changes.

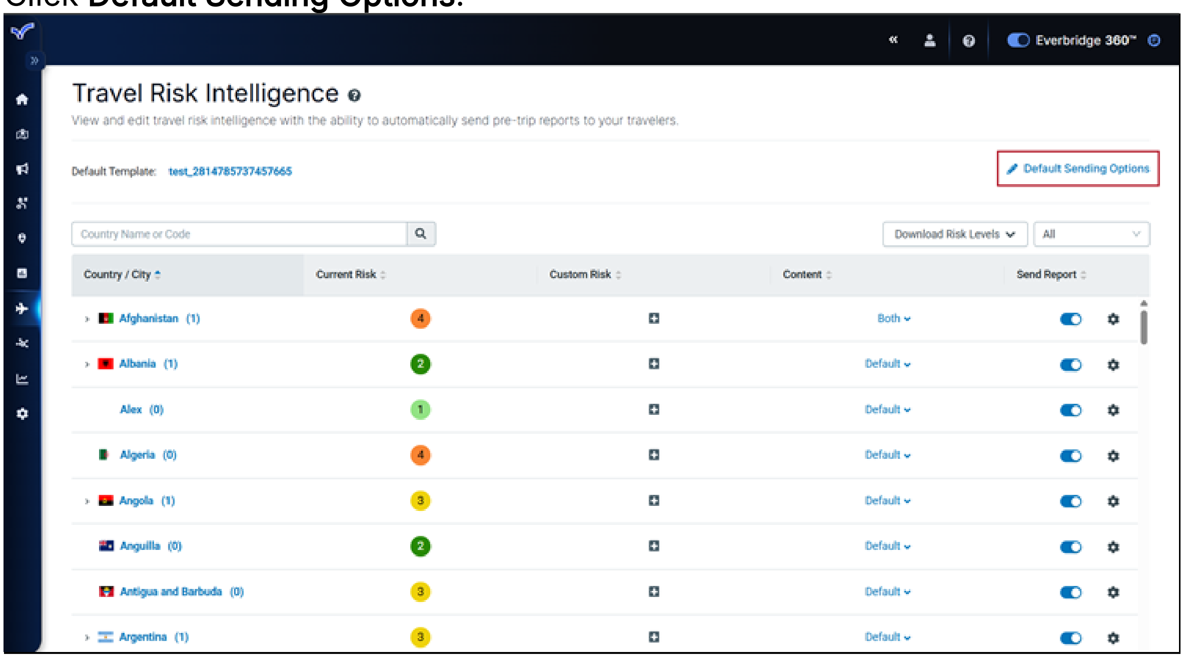
Risk Rating changes include both increases and decreases in Risk Level, whether updated by Everbridge RIMC (default behavior) or manually through the country's **Custom Risk** column.

Users can configure pre-trip advisory resending rules from the **Default Sending Options** and choosing the resend options that apply to their Organization. When enabled, the pre-trip country report will be resent shortly after any Risk Rating change.

NOTE: This option is disabled by default and must be manually enabled.

To configure these sending options:

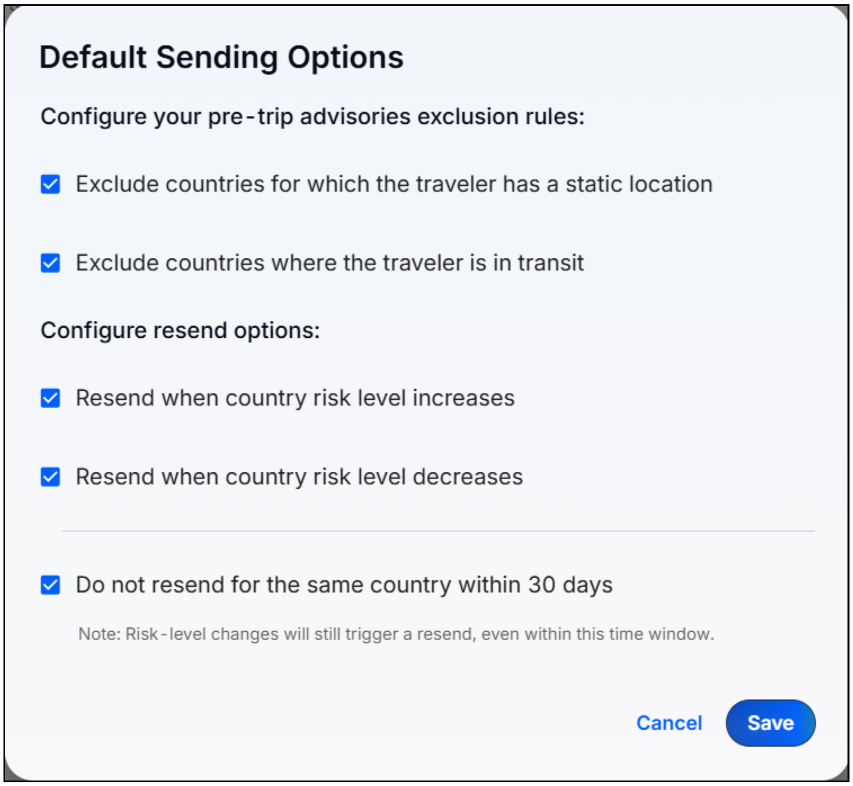
1. Navigate to **Travel Risk Intelligence**.
2. Click **Default Sending Options**.



3. Under **Configure Resend Options**, configure the following settings as desired:

- Resend when country level increases
- Resend when country level decreases

4. Click **Save**.



If exclusion rules are enabled, they will also apply to the resending rules. However, a change in Risk Rating will always trigger a resend, even if the “Do not resend for the same country within 30 days” rule is active.

When the Pre-Trip Country Report is resent, a section is automatically added at the bottom of the message defined in your Incident template and includes:

- **For Mobile and custom Email messages (HTML format):**
  The risk level for country <name of the country> has increased/decreased from <previous risk level> to <new risk level>
  Report: Country: <name of the country> Risk: <risk level> - <risk label>
  Date of Arrival in Country and Confirmation #:
  - <arrival date in country> - <PNR number 1>
  - <arrival date in country> - <PNR number 2>
  Traveler: <first and last name of the traveler>

  The <name of the country> - Risk: <country risk rating> is hyperlinked to the country-specific report. Selecting this link will open the country report as an

HTML page.

> The risk level for country United States has decreased from 4 to 3
>
> Report: Country: United States - Risk: 3 - Moderate
>
> Date of Arrival in Country and Confirmation #:
>
> - Oct 10, 2025 America/New_York - PNR-HOTEL-20250430
>
> - Oct 10, 2025 America/New_York - PNR-20250513
>
> Traveler:

- **For SMS (text format):**
  The Risk Level for country <name of the country> has increased/decreased from <previous risk level> to <new risk level>
  Country: <name of the country> Risk: <risk level> - <risk label>
  Report: <link to the country report>
  Date of Arrival in Country and Confirmation #:
  - <arrival date in country> - <PNR number 1>
  - <arrival date in country> - <PNR number 2>
  Traveler: <first and last name of the traveler>

Incident templates can be created with different variables to personalize the communication that is sent to travelers. For more details, refer to the **Sending Pre-Trip Country Reports** section above.

Viewing Pre-Country Reports in the Everbridge Mobile App

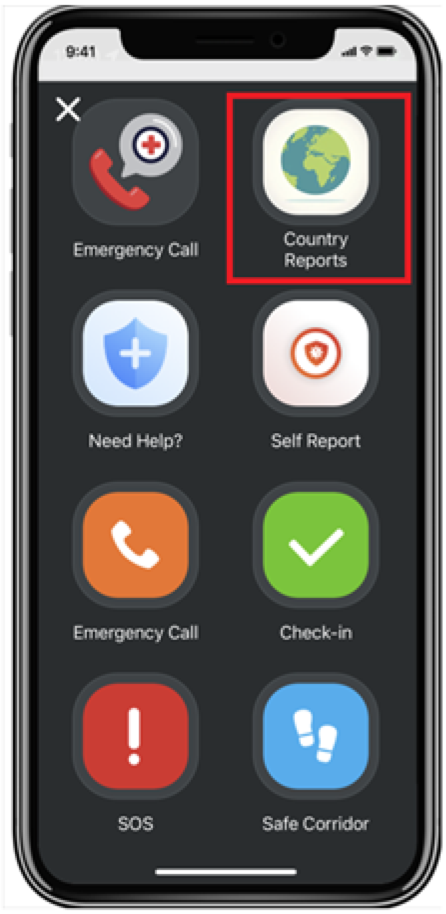
Travel Managers with access to the Travel Protector feature can configure a custom button to allow travelers to search for and view all Country Intelligence reports within the Everbridge Mobile App. City Intelligence Reports are available from the Country Reports.

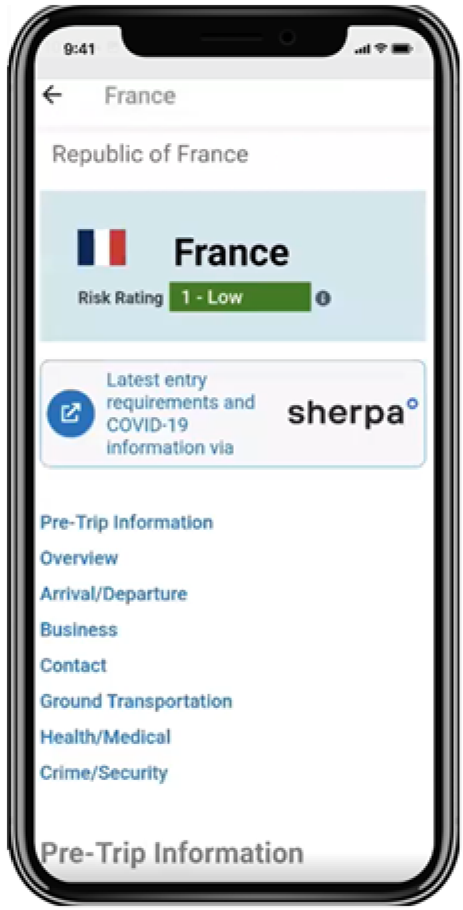
To set up a custom button for travelers to access the country reports:

1. Select **Settings** > **Everbridge Mobile App** > **Application Options** > **Safety**.
2. Create a new **Content** custom button.
3. Enter a Name and Description
4. Set which travelers will be able to see the button (All, by groups, or rules).
5. In the **Display Custom Content** section, specify the text that will be visible above the search field in the mobile app.
6. Select the **Show Country Reports** checkbox.

To search and display Country Reports in the mobile app, select the **Country Reports** custom button. A search field is displayed along with the content you set for the button. Enter at least three letters of the country name you are looking for to display matches.

Select the country to open the report.





Viewing Pre-trip Report Incidents

Pre-trip advisories can be viewed both in the **Everbridge Manager Portal** and **Visual Command Center**.

Manager Portal

Pre-trip advisories sent using an Incident template can be seen in the Manager Portal under **Incidents** > **Open History**. From here you can send an update if needed.

Visual Command Center

Only pre-trip advisories sent using an incident template can be viewed in VCC. Open the **VCC Operator console** and select the **Incident** tab in the **Feed** panel. Ensure the **Show Launched From Alert Only** check box is left **unchecked.** The list of pre-trips advisories is listed in the item panel.

To see the recipients of the pre-trips advisory, select the Incident, then select the notification.

Airline Risk Intelligence

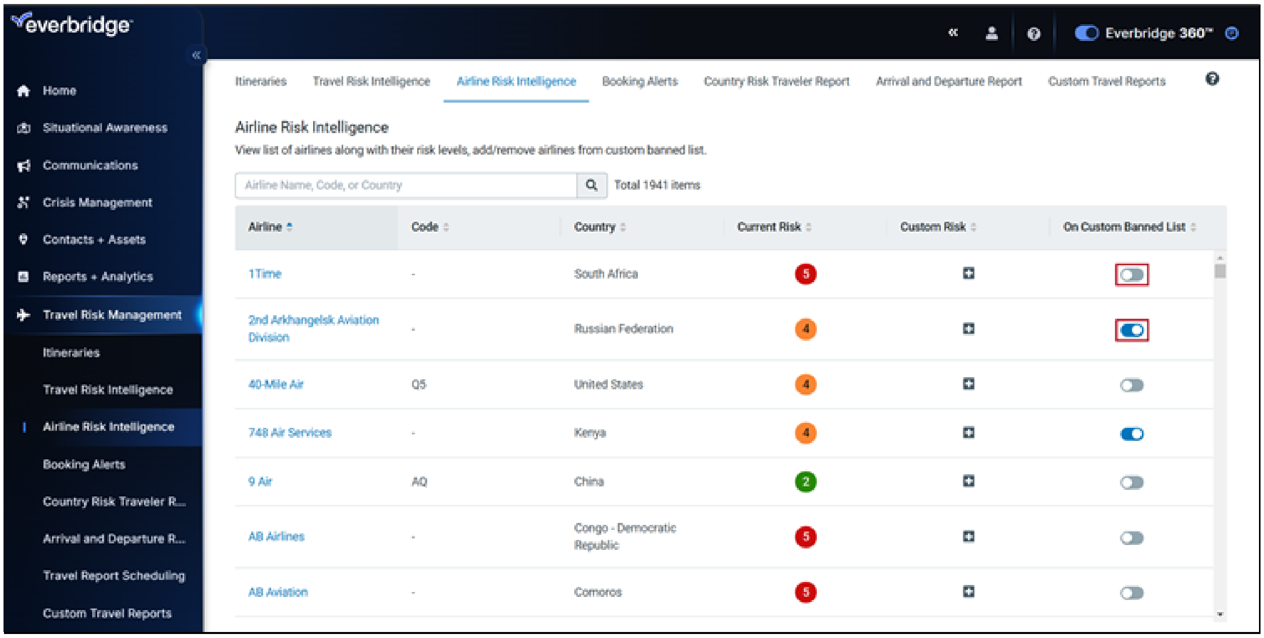
Airline Risk Intelligence is designed to help companies assess the relative risk factors associated with airlines. Using Airline Risk Intelligence, you can browse a database of over 1,800 airlines registered in 180 countries, and review airlines' risk factors and registration information. It includes both operational and defunct airlines. It can be accessed by navigating to **Travel Risk Management** > **Airline Risk Intelligence**.

Everbridge Flight Safe (https://flight-safe.com/) aggregates data through the **Airline Safety Assessment Mechanism** (ASAM), a method for evaluating the safety of scheduled commercial airlines. This information is then transmitted to Everbridge Travel Protector and can be used to generate High-Risk Airlines Booking Alerts.

In addition to viewing airline information, you can also establish your own Risk Levels and maintain a custom Airline Banned List.

Airline Risk Rating

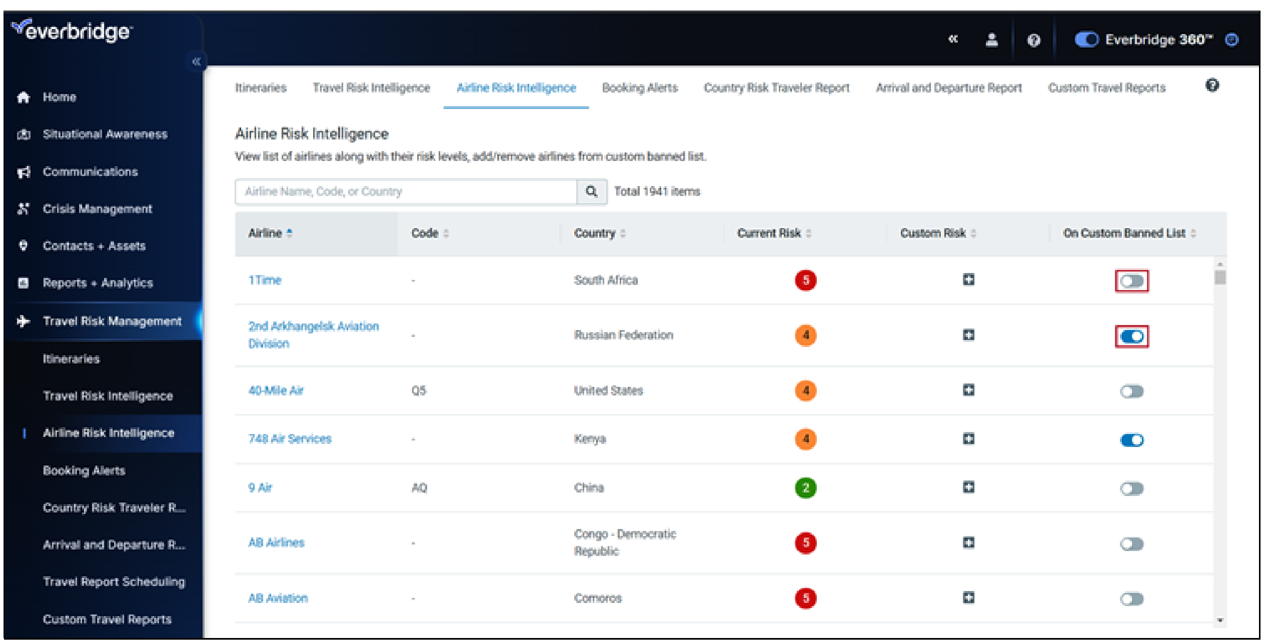
The Risk Rating provided for each airline ranges from 1 (Low) to 5 (Extreme). Risk Ratings are calculated based on the Airline Overall Safety Score provided automatically by Everbridge Flight Safe. You can override the Risk Rating for any airline by selecting the **+** button in the **Custom Risk** column and selecting a new rating.



This new custom rating will be displayed on the **Airline Intelligence Detail** page and used in the High-Risk Airline Booking Alert, Risk Rating threshold, until it is changed or removed.

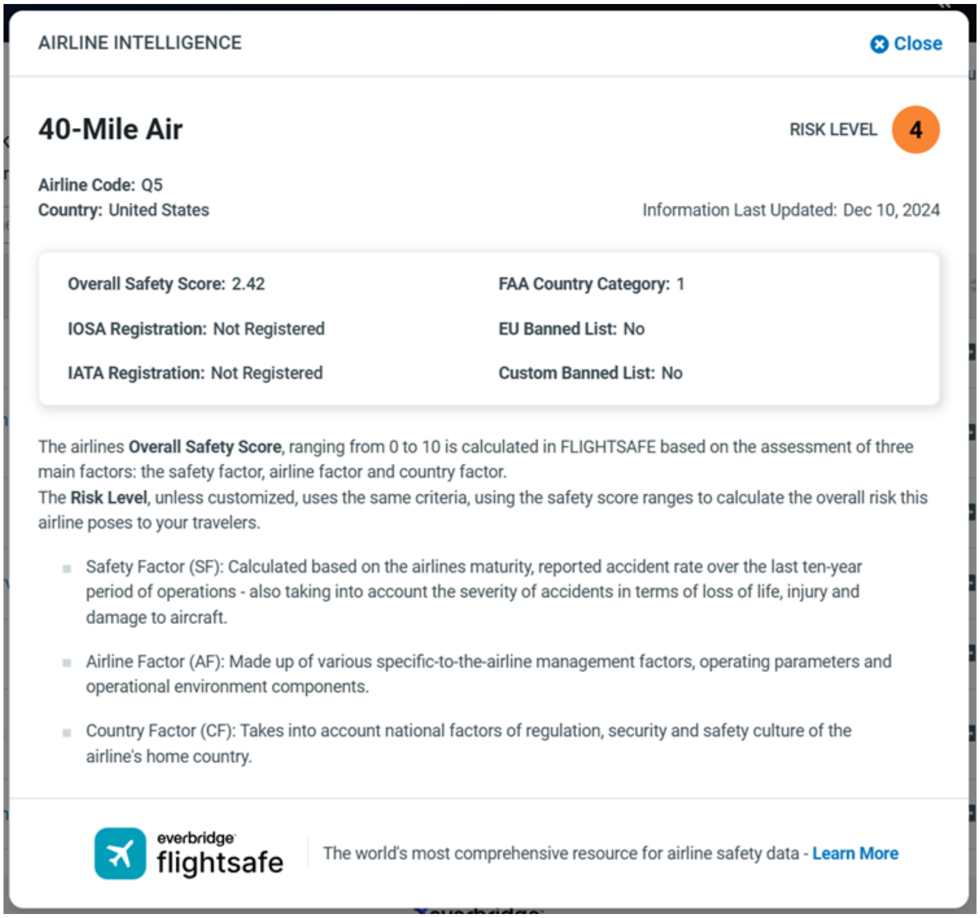
Custom Banned List

Depending on your company policy, you can manage your own Airline Custom Banned list by enabling the toggle in the **On Custom Banned List** column. The information will be used in the optional **High-Risk Airline Booking Alert** > **On Custom Banned List** threshold.



Viewing Airline Details

To view in-depth information about an airline, select the airline to open its **Details** page. Optionally, you can Search for the airline by name, code, or country of registration.



The following information is available for each airline:

- **Airline Name**
- **Airline Code** - Referenced by IATA and unique among all the airlines. Used to identify the airline in various accounting activities, like ticketing.
- **Country** - The Airline's country of registration.
- **Risk Level** - On a range of **1** (Low) - **5** (Extreme). Displays either the Custom Risk (if one exists) or the calculated Default Risk. The Default Risk level is automatically calculated using the score ranges of the Overall Safety Score.
- **Information Last Updated** - Date when any of the information for the airline was last modified in FLIGHTSAFE.
    - **Overall Safety Score** - Calculated on a range from **0** (Low) to **10** (Highest) in FLIGHTSAFE, based on the assessment of three main factors:

    - **Safety Factor (SF)** - Calculated based on the airline's maturity and reported accident rate over the last ten-year period of operations, also taking into account the severity of accidents in terms of loss of life, injury, and damage to the aircraft.
    - **Airline Factor (AF)** - Comprised of various airline-specific management factors, operating parameters, and operational environment components.
    - **Country Factor (CF)** - Takes into account national factors of regulation, security, and safety culture of the airline's home country.
- **IATA Status** - Whether the airline is registered with IATA or not. For more information, visit www.iata.org
- **IOSA Status** - Whether the airline is an IOSA registered operator. For more information, visit the IATA Operational Safety Audit (IOSA) Registry.
- **FAA Country Category** - United States Federal Aviation Administration country category. For more information, visit www.faa.org
    - **Category 1** - Complies with ICAO Standards. FAA inspectors have assessed a country's civil aviation authority and determined that it licenses and oversees air carriers in accordance with ICAO aviation safety standards.
    - **Category 2** - Does Not Comply with ICAO Standards. FAA inspectors have assessed a country's civil aviation authority and determined that it does not provide safety oversight in accordance with ICAO standards.
    - **Not Categorized** - The country has not been categorized by the FAA.
- **EU Banned List** - Whether the airline is banned from operating in Europe or not. For more information visit, https://transport.ec.europa.eu.
- **Custom Banned List** - Whether the airline is added to your own defined banned list.

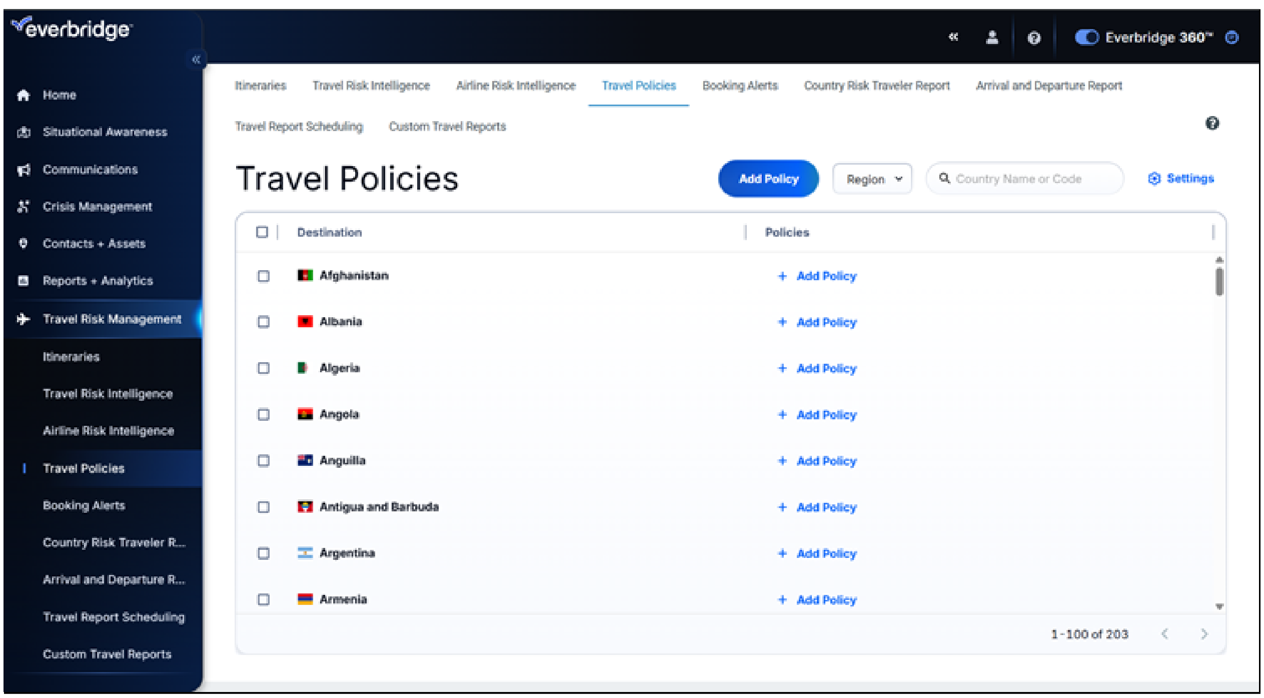
NOTE: An additional indicator is displayed for airlines that have ceased operations, along with the information and the last modified date in FLIGHTSAFE.

Travel Policies

Everbridge Travel Protector gives travel programs the option to approve, reject or request changes to itineraries that take travelers to dangerous destinations. The approval process occurs post-booking after travel arrangements have been made and confirmed.

Travel Protector receives passenger name records via direct data feeds from all the major global distribution operators, then cross-references those bookings against its destination risk ratings, which clients can adjust to suit their business needs. Trips to lower-risk areas proceed through the approval process automatically, whereas the system prompts designated managers to approve trips to high-risk areas.

The **Travel Policies** page is part of the Post Booking Approval Process and allows Travel Managers and GSOC users to set the approval requirements based on country and risk level, define the questionnaire that will be sent to travelers when approval is needed, and set the templates used to notify travelers and reviewers along the process.



By default, all itineraries created in Travel Protector are automatically approved. If your corporate travel program requires approval or prevent travel to specific countries, you can define your own policies.

Policies can be defined by country and risk level; for each country and risk level, you can define your rule from three options:

- Approve All Travel
- Review All Travel
- Deny All Travel

For each of the "Review All Travel" rules, you can set up to two reviewers. A single form/questionnaire can be defined and sent to the travelers when an itinerary requires review and approval.

You can define the Incident templates and the messages that will be sent to the travelers and/or reviewers at each stage of the process.

Process Overview

1. An itinerary is created or updated in Travel Protector. The policies are evaluated for the destination countries in the itinerary.
2. If one destination country in the whole itinerary is denied, the full itinerary is denied.
3. If All destination countries in the whole itinerary are Approved, the full itinerary is approved.
4. If one or more destination countries in the whole itinerary require review, the process continues.
5. A Notification is sent to the travelers (one Notification for all the countries).
6. The traveler fills up and submit the form/questionnaire.
7. Submission of the form triggers a Notification to the reviewers.
8. The reviewer navigates to the Manager Portal and opens the itinerary to review it.
9. In the Itinerary Details, the reviewer can see the questionnaire responses and can approve or deny the itinerary.
10. A Notification will be sent to the traveler upon approval or denial.

Accessing the Travel Policies Page

The Travel Policies page is accessible from the manager portal to users who have a role with Manage Travel Approval Policies permission enabled.

To set the permission as an Account Administrator or Organization Administrator:

1. Navigate to **Settings** > **Access** > **Roles**.
2. Select the role you want to update or create a new role.

3. Select **Permissions** and under the **Travel Risk Management** section, enable the **Manage Travel Approval Policies** permission.
4. Optionally, you can limit access to specific contact in your organization by selecting **Resources** > **Contacts** > **Limited access** and select the groups or dynamic groups you want to provide access for the role.

> **NOTE:** Manage Travel Approval Policies requires the following permissions: **Launch and manage Incidents** as well as **View contact Name and External ID**.
>
> When accessing the page, by default all countries are listed in the page along with the policy, if defined, for each country. You can search a country by name or country code and also filter countries by regions.

Managing Travel Policies

A single Travel policy can be created for each country. The policy applies to all contacts traveling to the designated country. In the policy, rules and reviewers can be defined for each country risk level.

Options are:

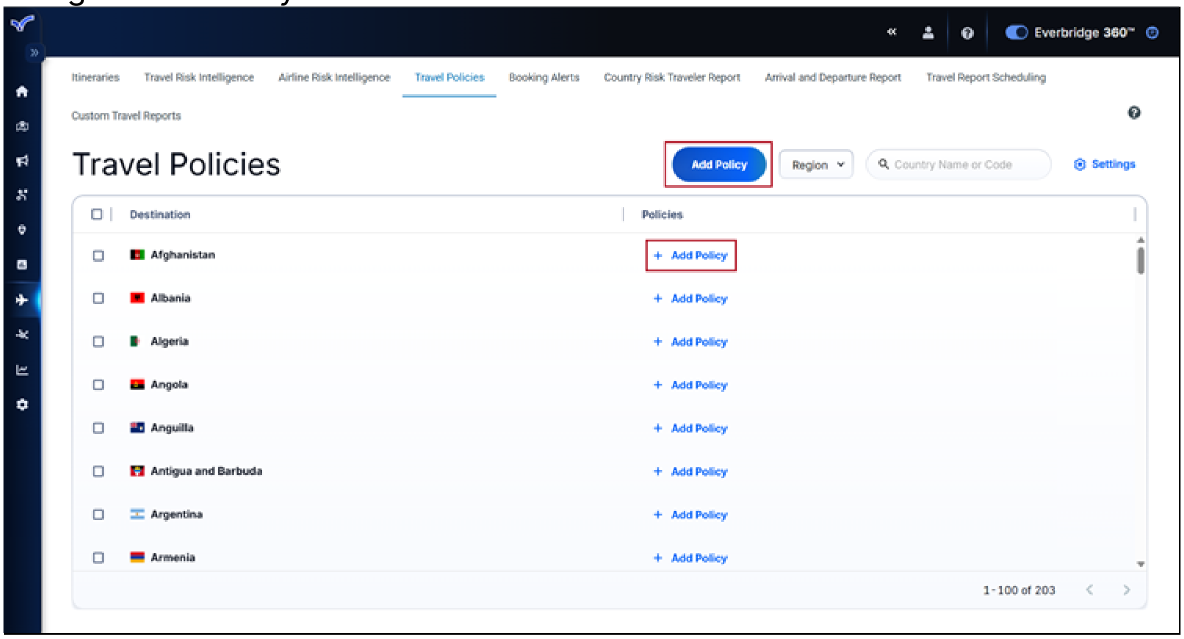
- **Approve all Travel** - Travel to the country will be automatically approved if the country is at the designated risk level when the itinerary is created.
- **Deny All Travel** - Travel to the country will be automatically denied if the country is at the designated risk level when the itinerary is created.
- **Review Travel** - Travel to the country will trigger the Post Booking Travel approval process and notify the traveler if the country is at the designated risk level when the itinerary is created.

Creating a Travel Policy

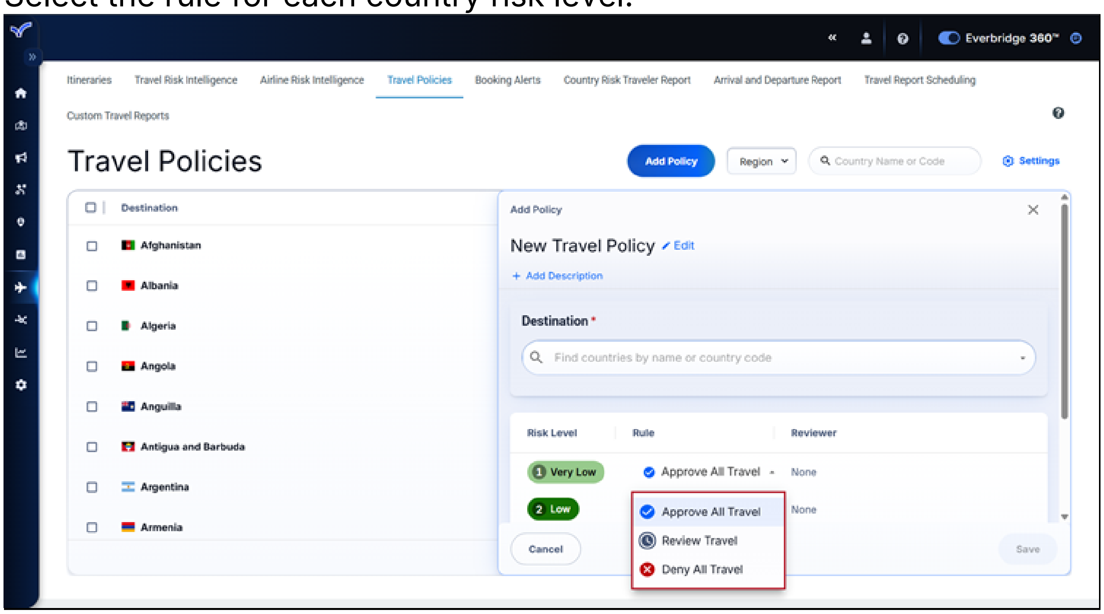
To create a Travel Policy:

1. Navigate to the **Travel Policies** page.
2. Select the countries for which the policy applies and select **Add Policy**. Alternatively, you can select the **Add Policy** action at the row level for a

designated country.



3. In the **Add Policy** user interface, set the following:
    a. Name (must be unique)
    b. Description
    c. Select a Destination country. By default, the selected countries are automatically added to the destinations, you adjust the list of countries if needed.
    d. Select the rule for each country risk level.



    e. Set up to two reviewers for rules set to Review Travel.
4. Select **Save**. The policy is listed in the Travel Policy table for all countries for which it applies.

NOTE: Only one policy applies to a country. When adding a country to a policy, if that country already has a policy, after warning and confirmation from the user, the country is removed from the existing policy and added to the new policy. Orphan policies are automatically deleted.

Editing a Travel Policy

To edit a Travel Policy:

1. Navigate to the **Travel Policies** page.
2. Select **Edit** next to the policy to open the policy.
3. You can update the list of countries for which the policy applies as well as the rules and reviewers.
4. Select **Save**. The policy table is updated.

Deleting a Travel Policy

If a policy applies to a single country, removing the policy from this country will automatically delete it from the system.

If a policy applies to more than one country, you can delete it from its detail page:

1. Navigate to the **Travel Policies** page.
2. Select **Edit** next to the policy to open the policy.
3. Select **Delete Policy**, then **Delete Policy** in the confirmation window
4. The policy is removed from all countries where it applied and is deleted from the system.

Setting the Travel Review Form

The purpose of the **Travel Review Form** is to collect necessary information and ensure that all aspects of the proposed trip align with company policies and procedures prior to approval.

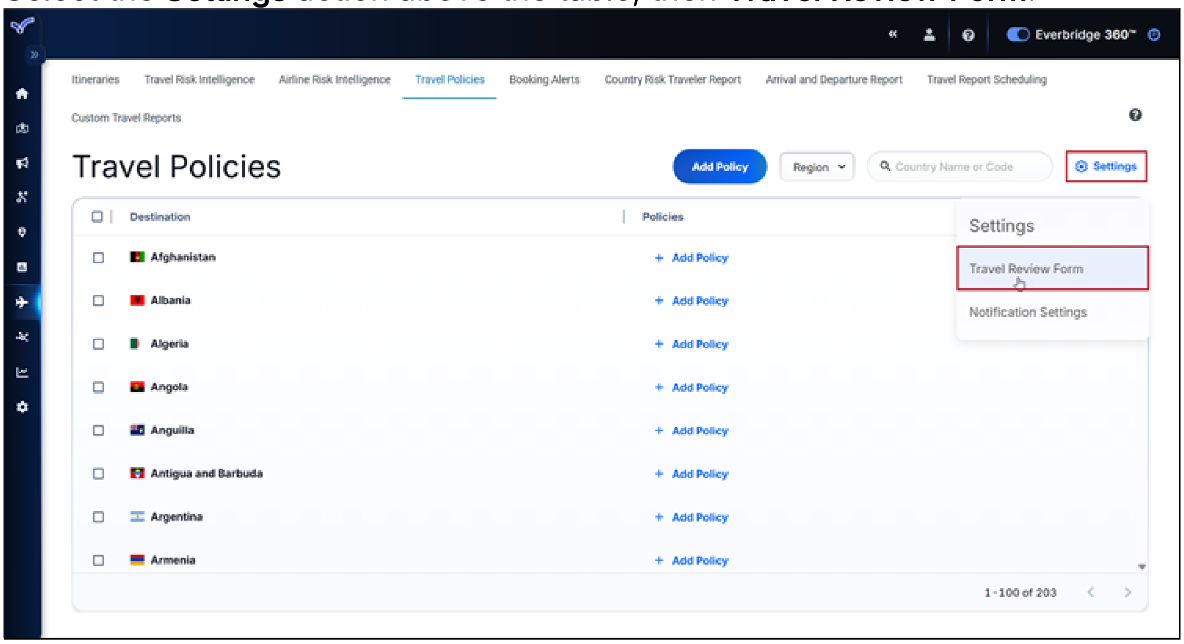
When an itinerary needs approval, an automatic Notification is sent to the traveler, which can include a form. Once the traveler submits the form, it triggers a Notification to the reviewers.

You can define one form for the Organization, which will be used for all travel approvals.

Creating the Travel Review Form

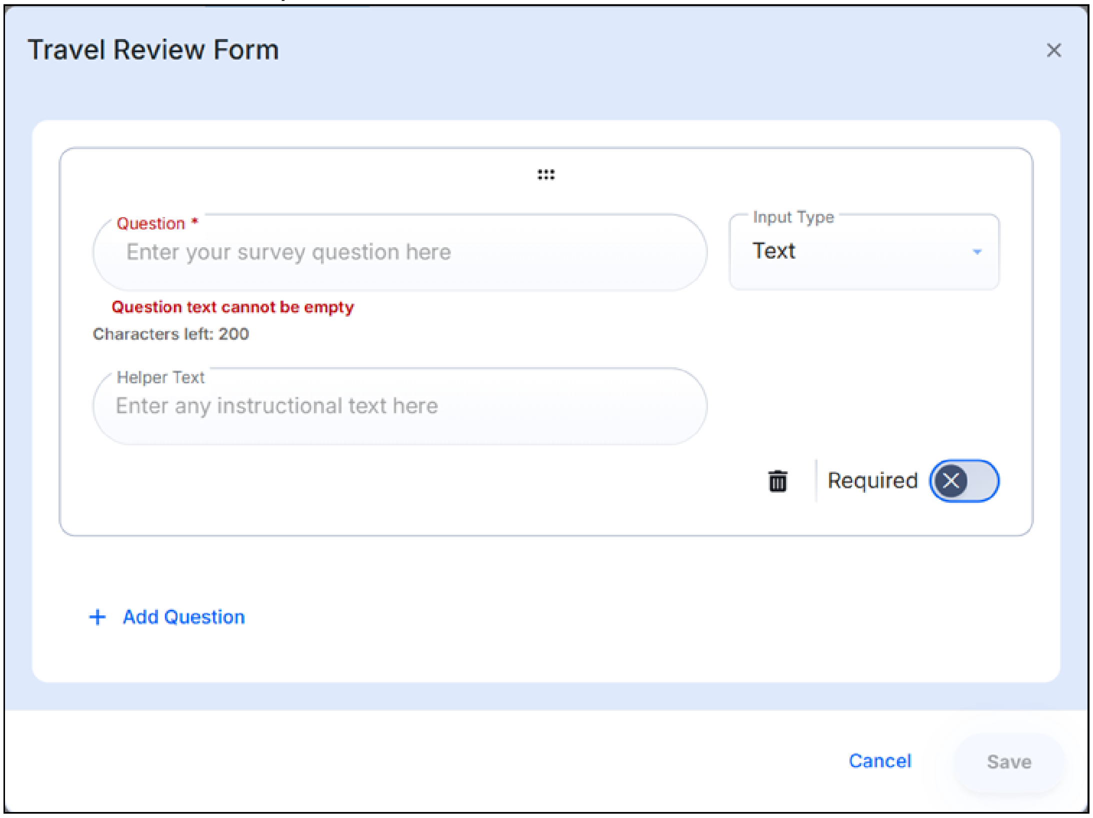
To create a Travel Review Form:

1. Navigate to the **Travel Policies** page.
2. Select the **Settings** action above the table, then **Travel Review Form**.



3. By default the form is empty. You can add as many questions as needed by selecting **Add Question**.
4. Enter the text for your question (limit 200 characters), an optional helper text (limit 256 characters) and the input text type (Text, Single Choice, Multiple

Choice or Number).



5. Select whether an answer to this question is required or not. Travelers must answer all required questions to submit the form.
6. Once your first question is defined, select **Add Question** to add another question.
7. You can reorder your questions by dragging the card to the proper position or by using the up/down arrows.
8. Once all the questions are defined, select **Save** to close the window and return to the Travel Policy page.
9. You can edit the form at any time by selecting the **Travel Review Form** action. The edited form will apply moving forward.

Setting Notifications Messages and Templates

As part of the approval process, notifications are automatically sent to the travelers and reviewers. Incident communication is used as part of this process.

There are four different Notifications that can be configured, for each one you can use different Incident templates or use the same template for all.

- **Travel Review Form** - When an itinerary is submitted, and a country requires approval, the travelers are directed to complete the Travel Review Form.

- **Reviewer Notification** - When the Travel Review Form is submitted by at least 1 traveler, a notification is sent to all reviewers. Reviewers are directed to assess the pending travel itinerary.
- **Travel Approved** - When the approval is granted for the itinerary, travelers are notified that their travel was approved.
- **Travel Denied** - When the itinerary is denied, travelers are notified that their travel was denied.

Travel Protector will auto-fill values in the notification using system variables so you can fully customize your message. If you do not add variables to your outgoing message, no information is sent to the travelers and reviewers.

Variable	Type	Description
_Travel: PNR Number	Autofill	PNR number in full text.
_Travel: PNR URL	Autofill	Deep link to the PNR details in the Manager Portal itinerary page. Authentication to the Manager Portal is required to access the itinerary details.
_Travel: Itinerary Start Date	Autofill	Start date of the itinerary as submitted by the booking system or calculated from the first segment departure date.
_Travel: Itinerary End Date	Autofill	End date of the itinerary calculated from the last segment arrival date.
_Travel: Travelers List	Autofill	List of contacts matched to the travelers in the itinerary.
_Travel: Itinerary Approval Status	Autofill	Approval status of the itinerary at the time of the Notification.
_Travel: Approval Required Country List	Autofill	List of countries in the itinerary that requires approval at the time of the Notification.
_Travel: Reviewers List	Autofill	List of reviewers as defined in the policy at the time of the

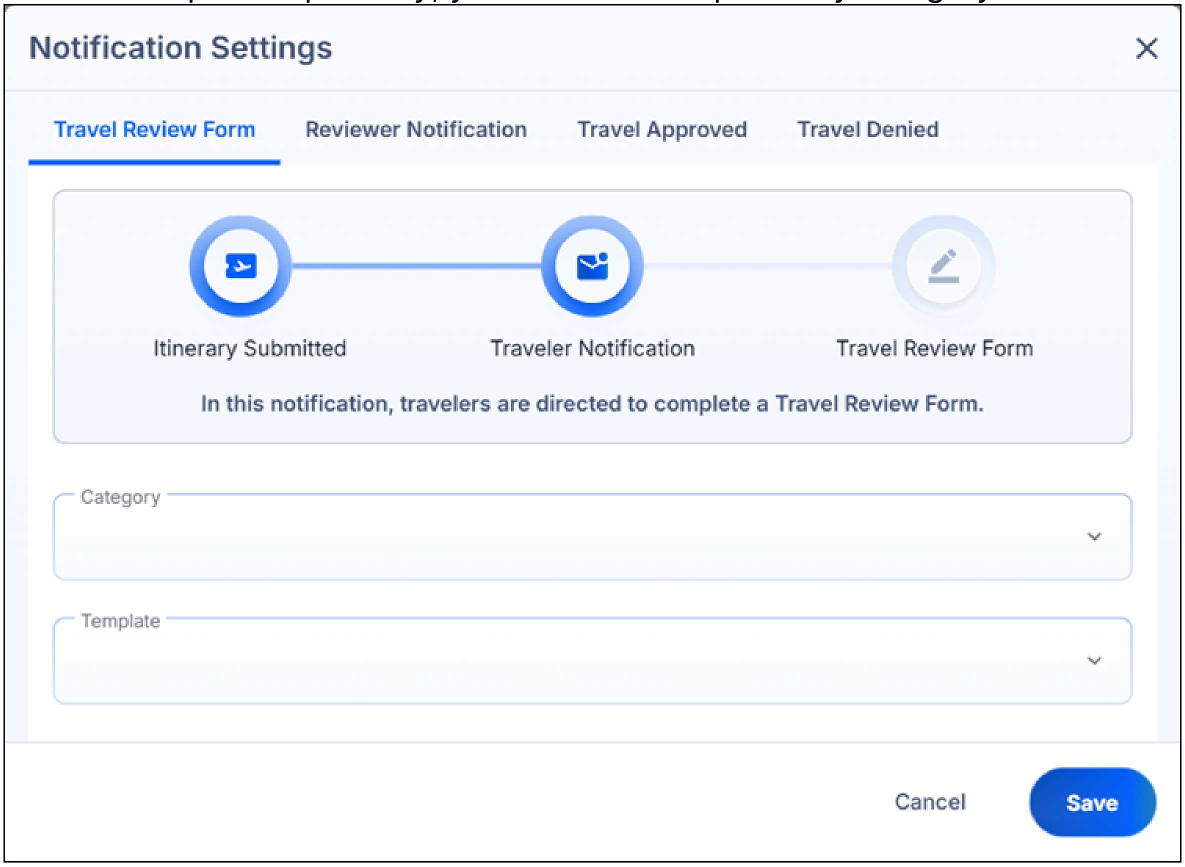
		Notification for all countries in the itinerary requiring approval.
_Travel: Approval Form URL	Autofill	Link to the Travel Review Form in the Member portal for the Traveler to fill. This variable only applies to the initial traveler Notification.

NOTE: Ensure the **Edit Message** and **Edit Contacts** permissions are enabled in the **Operator Permissions** page for each template.

To configure a Traveler Notification:

1. Create your Incident templates and set the messages using the **_Travel** system variables.
2. In the **Travel Policies** page, select the **Settings** action, then **Notification Settings**.

3. Select the tab corresponding to the Notification you want to configure and select a template. Optionally, you can filter templates by category.



4. Once all your Notifications are configured, select **Save**. The templates will be used for all new or updated itineraries.

NOTE: As the approval process relies on the submission of the Travel Review Form to notify the reviewers, you need to ensure the **_Travel: Approval Form URL** system variable is included in the template used for the Travel Review Form notification to travelers.

Custom Reports

The **Reports** module allows you to add Custom Reports, which cover multiple Notifications or Incidents and travel information for Travel Protector customers.

There are five levels of report types for Incidents:

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

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

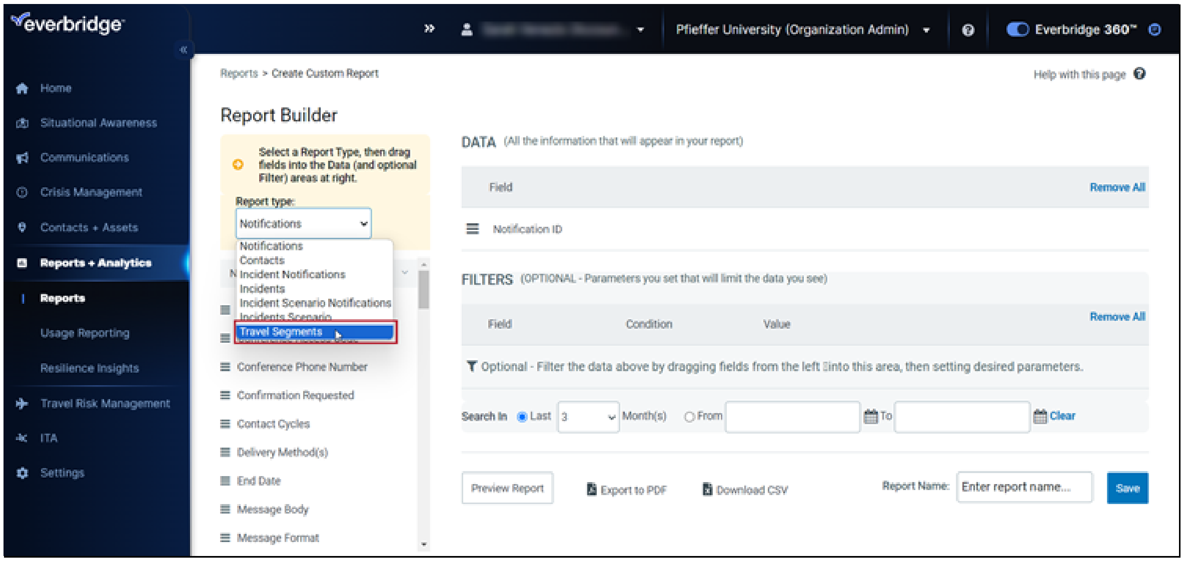
Travel Custom Reports

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

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

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

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



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

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

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

Example Travel Custom Report

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

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

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

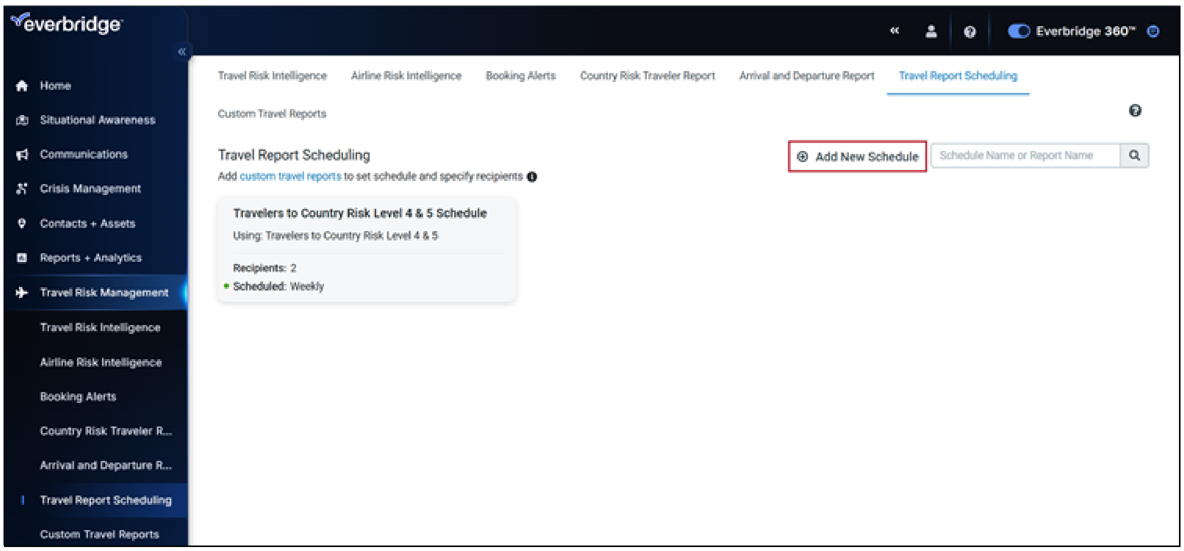
NOTE: Do not open the CSV file until the file is finished processing. Excel will shorten long External Ids if the file is opened before processing is finished.

Scheduling Custom Travel Reports

Custom Travel Reports can be scheduled to be automatically generated and emailed at defined recurring times. You can create up to 100 schedules, and the same report can have more than one schedule.

Creating a Schedule for a Travel Custom Report

1. From **Travel Risk Management Menu** > **Travel Report Scheduling**, select **Add New Schedule**.



2. Select a preexisting Travel Report.
   - Only reports of the **Travel Segments** type can be scheduled.
3. Ensure your schedule has a name. Optionally, you can change the default name of your schedule.
4. You can provide an optional description of your schedule.
5. Set the recurrence (**Daily**, **Weekly,** or **Monthly**) along with the times and time zone for when your report will be generated and sent. Duplicate times will be ignored.
   a. **Daily**: you must specify at least 1 time for the day from the available list.

   b. **Weekly**: select the days of the week along with the times of the day from the available list. The report will be sent at the same selected times each selected day.
   c. **Monthly**: Enter the months of the year along with the days and the time. To enter the day of the month, select New Date, type the day number, then Enter. Only 1 time can be selected, the report will be sent at the same time, each specified day for the selected month.

- For months that do not include the dates specified, no report will be scheduled for that month. For example: if 31, January, and February are specified, the report will not be sent in February.

6. Enter the email addresses that you want to receive the report. Separate multiple emails with a comma.
7. Optionally, you can select **Run Report Now** it will generate the custom report and send it to the email addresses specified.
8. Save the schedule.

Editing a Schedule

1. From the **Organization** > **Travel Risk Management Menu**, click **Travel Report Scheduling.** All schedules are displayed in alphabetical order.
2. You can also search for your schedule. Search is case-insensitive and will search within schedule names and report names.
3. Select your schedule to access the details.
4. You can change any of the details such as report, name, description, schedule, email list, etc.
5. Save the schedule to apply the changes.

Deleting a Schedule

1. From the **Organization** > **Travel Risk Management Menu**, click **Travel Report Scheduling.** All schedules are displayed in alphabetical order.
2. You can also search for your schedule. Search is case-insensitive and will search within schedule names and report names.
3. Select your schedule to access the details.
4. Select **Delete Schedule.** Deleted schedules cannot be recovered.

Temporarily Disabling a Schedule

1. Active schedules are displayed with a green dot In your Schedule list. Schedule (daily, weekly, monthly) is indicated.
2. Select your schedule to access the details.
3. Turn off the switch next to Schedule This Report to **Run Later**.
4. Save the schedule.
    - Details of disabled schedules cannot be changed. You must toggle the Switch back to **On** in order to change the details.

Retrieving a Report

A link to the report is sent by email to all email addresses specified in the schedule details.

You must be an **Incident Administrator** or **Data Manager** within Everbridge Suite for the Organization in which the report was created in order to receive a report. Additionally, ensure that the following necessary permissions are enabled for the Organization where the report was created:

- **Contact Management** > **View Contact Name and External ID**
- **Contact Management** > **View and download contact record information**
- **Settings** > **Travel Risk Management** > **View Travel Reports**

To retrieve the report:

1. Click the link in the email. You will be asked to authenticate to the Manager Portal.
2. If your user belongs to more than one Organization or has more than one role in the Organization, select the Organization and a role that has proper permissions. You may need to click the link in the email a second time.
3. The CSV file for the report is downloaded. Open the CSV file to access the report.

Additional Considerations

You cannot change the type of a Travel Segment report that is already scheduled. You must delete any of the schedules that uses this report before changing the type.

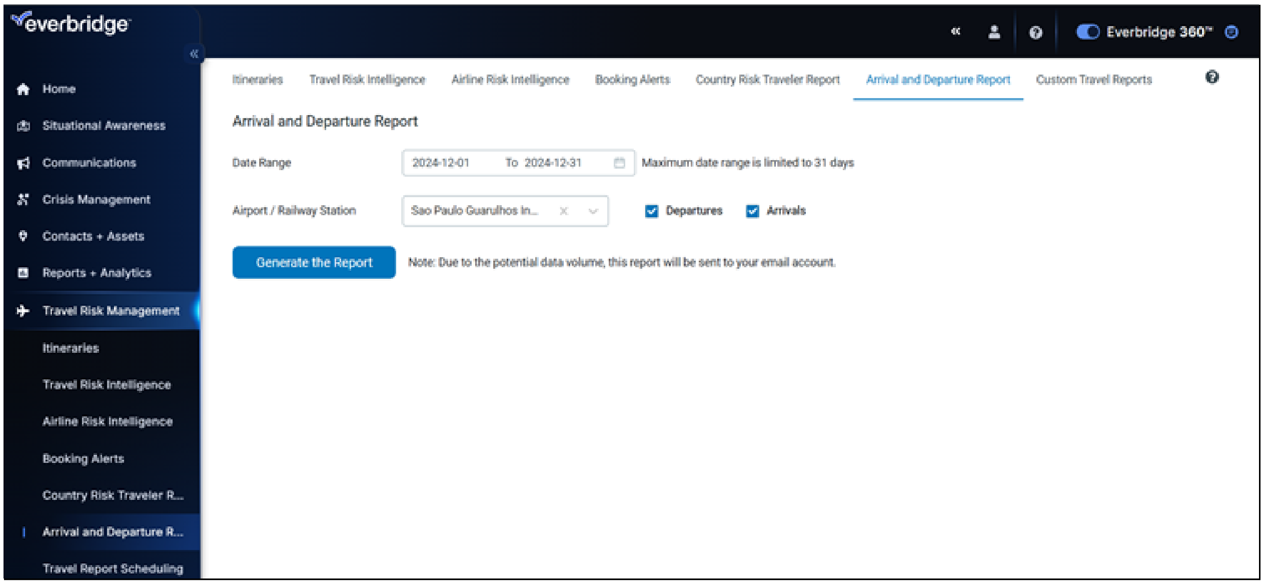
You can delete a report that is already scheduled. The report will no longer be sent. The schedule will not be deleted but will not include any reports. You can either edit the schedule to select a different report to be sent or delete the schedule.

Other Reports

Additional pre-defined reports can be accessed from the Manager Portal. These reports cannot be automatically scheduled to be sent at recurring intervals.

Arrival and Departure Report

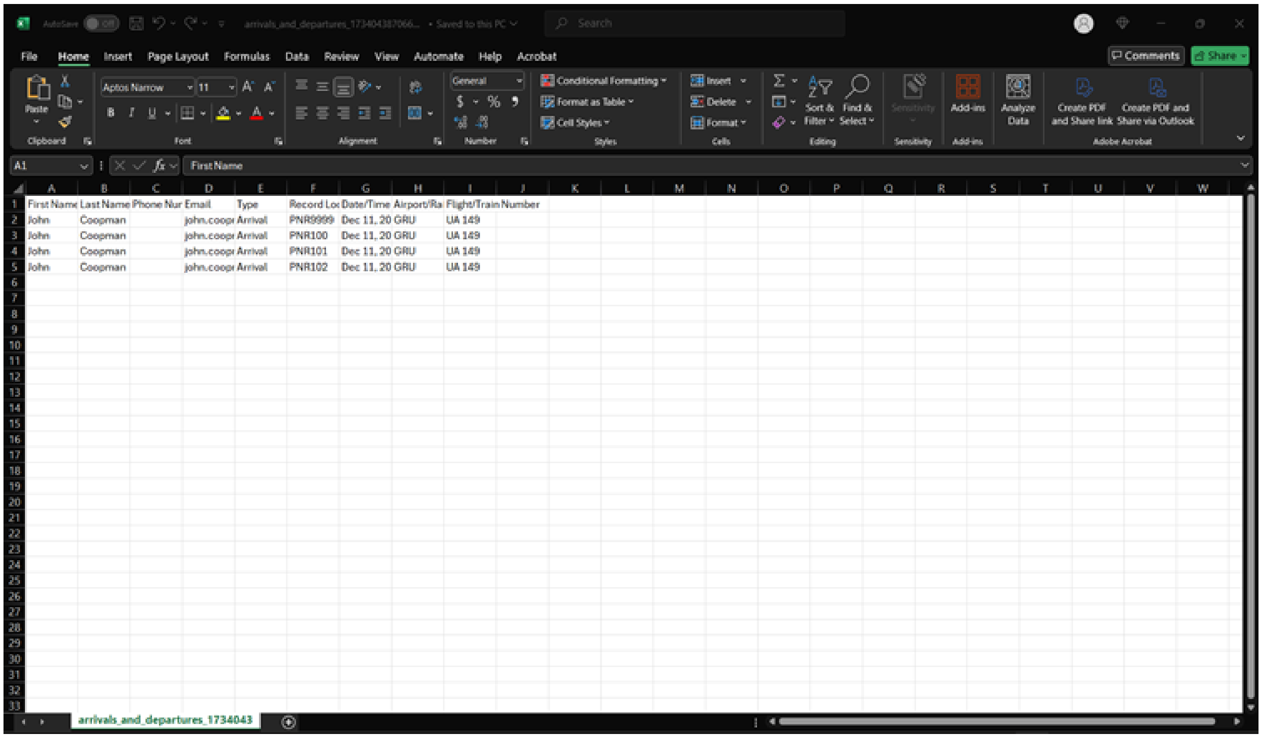
The **Arrival and Departure** report will provide the list of travelers who are departing and/or arriving from a specific airport or train station during a specific time range.



To run the Arrival and Departure report, navigate to **Travel Risk Management** > **Arrival and Departure Report**.

1. Specify a time range of up to 31 days by selecting a start and end day.
2. Select an airport or a railway station in the list or type the name or code for a quick search.
3. Select whether you want to consider **Arrivals only**, **Departures only**, or **both**.
4. Select **Generate the Report**.

A link to the report will be sent by email to the email address of the authenticated user.



The CSV report contains the following information:

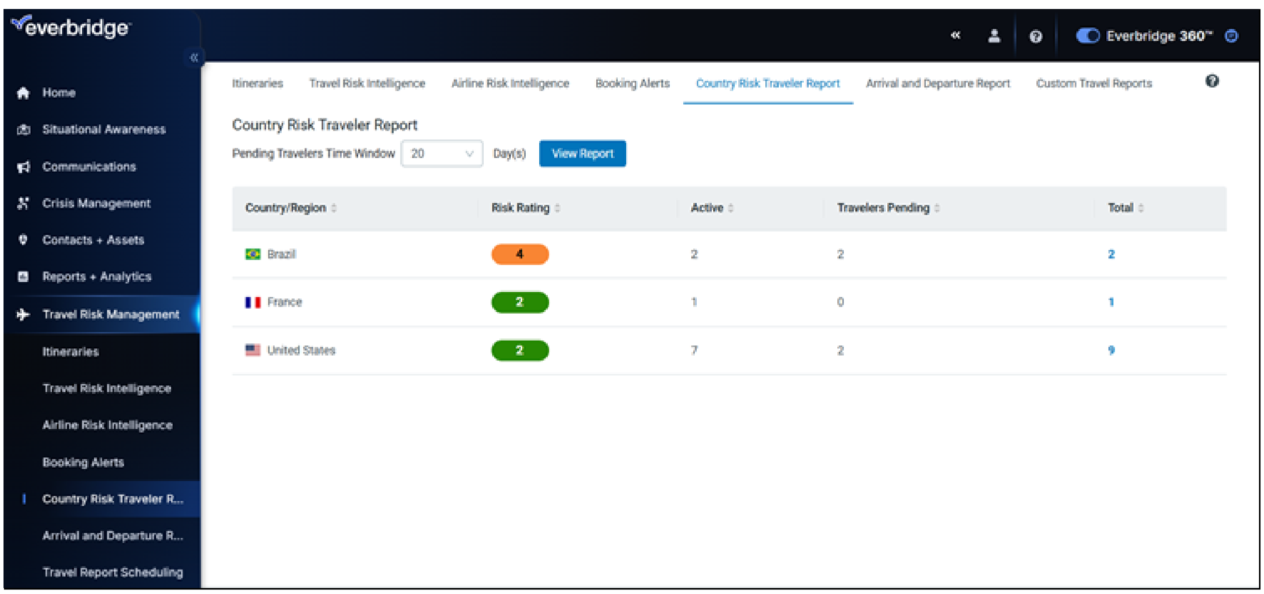
- Traveler First name
- Traveler Last name
- Traveler phone number
- Traveler Email address
- Travel location type (Departure, Transit, or arrival)
- Itinerary Record Locator (PNR)
- Date and time of arrival or departure
- Airport or train station IATA code
- Flight or train number

Country Risk Traveler Report

Located in the Manager Portal under **Travel Risk Management** > **Country Risk Traveler Report**. This report displays the number of active or pending travelers per country within a specified time window.

To run this report, select the number of days, starting from today, you want to include in your report. The report will include all travelers who have travel locations during that time range.

The result will list, in a table, each country that has either active or pending travelers. It will include the count of travelers for each category, the total count, along with the custom risk rating for this country. If there is no custom risk rating defined for a country the default rating will be used. Optionally, you can sort on any columns in the table.



For each individual country, you can download the report into a CSV file by clicking the link of the total number of travelers to a specific country. The file will include:

- Traveler First name
- Traveler Last name
- Traveler Phone number
- Traveler Email
- Latitude and longitude of their travel location
- Travel location type (Departure/Arrival/Transit)
- Segment Type (Air/Rail/Car/Hotel)
- Local/Non-Local location type

- Domestic/International location type
- Departure and Arrival Date and Time
- Departure and Arrival Airport/Train Station IATA code
- Flight/Train Numbe

Traveler Communication

Risk Events

Risk Events are anything that could negatively impact the safety of the people or the normal functioning of a business or organization. This includes a wide range of things, including:

- Local Disasters
- Hazmat/Fire
- Transportation
- Health & Disease
- Terrorism/Suspicious Activity
- Weather
- Natural Disaster

Risk Events can have the following severity:

- Extreme
- Severe
- Moderate
- Minor
- Unknown

Incidents

Incidents are the method by which alert information can be communicated to the people (such as travelers) who are affected by it or need to act on it, or to stakeholders who may need to be informed about it. Incidents have a life cycle that encompasses all the communication that may occur as a response to an alert. When responding to a situation, you need to choose the action that represents the best way to handle the situation. For example, a hurricane is approaching an airport and a watch has been called. The storm has already reached Category 2, and 20 employees will be transiting by this airport. With Incident communications, you can use quick, template-based, automated communication plans for responding to events within a company, organization, or government office.

In the example above, you can launch an Incident notification to communicate to your travelers that they will be impacted and that delays or cancellations may occur. Alternatively, you may have a situation that does not immediately have a high impact but has the potential to develop into a higher severity. For example, a tropical storm is approaching the Miami airport. It is projected to make landfall within the next three to four days. In this case, you may want to inform your travelers, but no immediate action is required. Using Incident communications, you can launch an Incident and make updates to it as a situation progresses.

Alerts

Alerts are automatic messages that pop up in VCC through an ongoing feed. They flag situations that a VCC Operator should review as potentially concerning. They are triggered when Risk Events are determined to impact Assets based on the Event's timing or location. In short, Risk Events that overlap with Assets (People, Buildings, etc.) within a certain location or time frame create an alert for the Travel Manager (VCC Operator) to review.

Operator (Travel Manager or Security Manager) Entered Risk Event

An Operator-entered risk allows you to create a polygon and capture all contacts/travelers/assets within the polygon for alerting.

1. Select the Risk Events Feed on the right.
2. Scroll down the drop-down menu and click on **Operator Entered Risk**.
3. Select **Create New Item**.
4. Select **Point** or **Area** and select the area on the map for which the Risk Event is taking place.
5. Create the area for the Risk Event on the map. Ensure that any assets affected are within the created area, which will trigger an alert
6. Enter a Title.
7. Optionally, enter a Summary.
8. Select a Category from the dropdown menu.
9. Enter an Event Start and End Date/Time.
10. Select **Save**.

Setting up Traveler Communication

Once you know that an event is going to impact your assets or travelers, you need to make some decisions to protect those people and assets. For example, implementing standard operating procedures, team activation, situational reporting to key stakeholders, and notifying employees in an impacted location can all be automated in Visual Command Center.

To do this, you must configure some incident templates in the Everbridge Manager Portal to begin launching incidents from Visual Command Center Operator Console. Everbridge provides some incident templates that you can tailor, depending on your requirements.

You can launch an Incident in three ways:

- **Launch an Incident from a Visual Command Center Alert**
  - You can launch a single Incident or a scenario that allows sending, at the same time, different communications to different traveler types for the same Alert.
- **Launch an Incident from a risk event without an Alert**
  - You can launch a single Incident and select your travelers based on their expected locations.
- **Launch an Incident automatically**
  - You can configure Incidents to be automatically launched when an Alert is triggered.
  - Scenarios cannot be auto-launched, there is no ability to send a different communication to different contact types.

To do this, you must configure
Incident templates in the Everbridge Manager Portal to begin launching Incidents from Visual Command Center Operator Console. Everbridge provides some Incident templates that you can tailor, depending on your requirements.

Incident Communication Templates

Incident templates consist of:

- Variables that have specific meaning to Visual Command
  Center and contain the information that you want when launching an Incident
- Components that make up the Incident template, for example, message title, body, and instructions

Incident template variables/components are configured in Everbridge Suite by your Organization Administrator.

Communication templates can be created with different variables to tailor the communication that is sent to travelers based on the type of risk event occurring, Visual Command Center can auto-fill most of the variables with information from an alert. Variables prefixed by VCC! are variables that allow an Operator to perform an action.

Variable	Type	Description
VCC!: Add EB Contacts in Area	Action	Allows you to add contacts currently affected by the alert to this recipient list for this Incident.
VCC!: Attach Map	Action	Allows you to attach a map of the alert area and assets to the notifications.
VCC!: Attach Report	Action	Allows you to attach a report to the notifications that summarizes the alert and lists the affected assets (up to 1,000).
VCC!: Record Type	Action	Allows you to choose one or more types of contact to receive notifications.
VCC!: Location Type	Autofill	Allows you to choose the types of contacts locations to send notifications.
VCC: Affected Asset Count	Autofill	Number of assets affected by this alert as specified by Visual Command Center, including contacts, buildings, and custom assets.
VCC: Alert Category	Autofill	The alert category specified in the current alert and data source. For example: earthquake, civil unrest, or transportation.
VCC: Alert Country	Autofill	The country where the alert event took place specified by the event source.
VCC: Alert Description	Autofill	The alert description specified in the current alert.
VCC: Alert End Time	Autofill	Date and time the alert expired set by the event source of Visual Command Center.
VCC: Link to Alert	Autofill	This embeds a link to a Visual Command Center alert in your Incident notifications. Recipients who are Visual Command Center users can select the link, log in to Visual Command Center, and go directly to the alert on the map.
VCC: Alert Location	Autofill	The location specified in the current alert.

VCC: Nearest Asset	Autofill	If the alert location is a point, then this displays the Type, Label, and Distance in KM from the alert event for the asset closest to the event. If the alert location is a polygon or line, then this displays the Type, Label, and Distance in KM for a representative asset within the polygon or impact area.
VCC: Nearest Asset Distance	Autofill	If the alert location is a point, this variable returns the distance in KM from the alert event for the asset closest to the event. If the alert location is a polygon or line, then this displays as Not Applicable.
VCC: Alert Severity	Autofill	The alert severity specified by the data source.
VCC: Alert Severity	Autofill	The alert severity specified in the current alert.
VCC: Alert Source	Autofill	The data source for the risk event.
VCC: Alert Start Time	Autofill	Start date and time of the risk event.
VCC: Alert State/ Province	Autofill	State or province where the risk event took place.
VCC: Alert Title	Autofill	The alert title specified in the current alert.
VCC: Alert URL	Autofill	If available, a URL for additional information about the risk event.
VCC: Alert Updated Time	Autofill	The last time the alert was updated.

In addition, in the template you can configure:

- The message title and body and include any of the variables above.
- Message options, such as Imminent Threat to Life, High priority, send confirmation, attach maps and reports.
- Delivery options such as phone, SMS or mobile push, along with sender email display name
- The Message type such as Standard, Polling, or Conference Bridge (for GSOC/HR to discuss mitigation efforts).
- Text response options for the message.
- Recipient options such as subscribers and contact in the area.
- Location types (Static, Dynamic, Expected).

- Contact types such as VIPs, Expats, or Employees.
- Escalation options if a predefined number of responses aren't received within X minutes (if enabled for the organization).
- Define notification cycles to control how many times, and time between cycles, Everbridge attempts to deliver the notification for the contacts who have not yet confirmed.
- Define the language (out of 30+ languages) of Everbridge's voice prompts and text prompts as well as the style/tone used by the text-to-speech engine.
- Provide a reply-to email address that your contacts can reply to for more information.
- Provide the ability to invite contacts to an Incident chat after the notification has been sent.

Once the Incident has been sent the travel manager is able to:

- View all open Incident communications and send updates from either the Visual Command Center Incident feed or from the Manager Portal.
- Download reports based on responses and users who were not reachable.
- Create chat via mobile to specific recipients – i.e., travelers or GSOC/HR
- Initiate the conference call line sent along with the notification for Message Type "Conference Bridge" – GSOC/HR to discuss mitigation efforts (the conference call line.
- Manage and launch Incidents via the ManageBridge Mobile App.

For more information on how to configure and manage your communication templates, please refer to the Incident Communications User Guide.

Travel-Related Use Cases

Use Case #1: As a travel manager, I need our travelers to be notified when a tornado has touched down and if no response is received, contacted again within 10 minutes, and if no response is still received contacted again in 10 minutes, with reporting available on all responses.

Use Case #2: As a traveler, I would like to receive notifications via text and push notifications via mobile, but when I am not traveling, I would prefer email.

Use Case #3: As a travel manager, I would like to open a chat line via Everbridge Mobile and a conference line for anyone to message/call for immediate triage and notify my travelers accordingly.

Best practice: Automate communications based on severity for higher-level risk events to be sent to travelers without delay, and for lower-level severity, risk events automate notification to yourself/team to review prior to communication.

This will help reduce noise fatigue and ensure they are looking at the risk events you deem most important.

Targeting VIPs and Expatriates

Using contact type/groups/rules for these unique traveler types unleashes all functionality within the CEM platform for contacts including the ability to create communications, filter by record type/groups on the map, and provision custom mobile app buttons by contact rules and groups.

Contact Types: Contact/record types can be profiles created to assign contacts to categories like VIP or Expat. Temporary travelers created by the travel location data feeds are added using this same functionality.

Groups: Groups are a way to organize contacts for quick selection. Groups are static and contacts are added and removed from a group as needed. Contacts can be in more than one group, and group information can be included as a part of an upload file or API. Group managers can manage contact profile and send notifications to contacts in their own group.

Rules: Rules are a dynamic way to select contacts using multiple filters based on contact information – such as an address, record type, etc. and do not require maintenance since they run dynamically at the time they are invoked.

Sending a Traveler Communication

Communication can be launched in two ways:

- Manually from either Visual Command Center or the Manager Portal.
- Automatically based on an incoming Risk Event.

Once you have assessed an Alert or a Risk Event, you need to decide how to respond to it. There are many options available.

When responding to a high-impact Alert, you need to choose the action that represents the best way to handle the situation. For example, there may be a hurricane approaching and it will impact your travelers. You may want to launch an Incident to communicate to your travelers with instructions.

Launching a Communication Manually

From an Alert

In Visual Command Center, enable the **Alert Feed** to display Alerts

1. Select an Alert on the map to display its details in the Alert Feed.
2. Select the Incident icon then click **Launch Incident**.
3. Select the Incident template you want to use. You can filter templates by categories.
4. Validate the message title, content, and options.
5. Specify the location type (select expected/travel location for travelers) and contact types.
6. Preview and review prior to sending the communication.

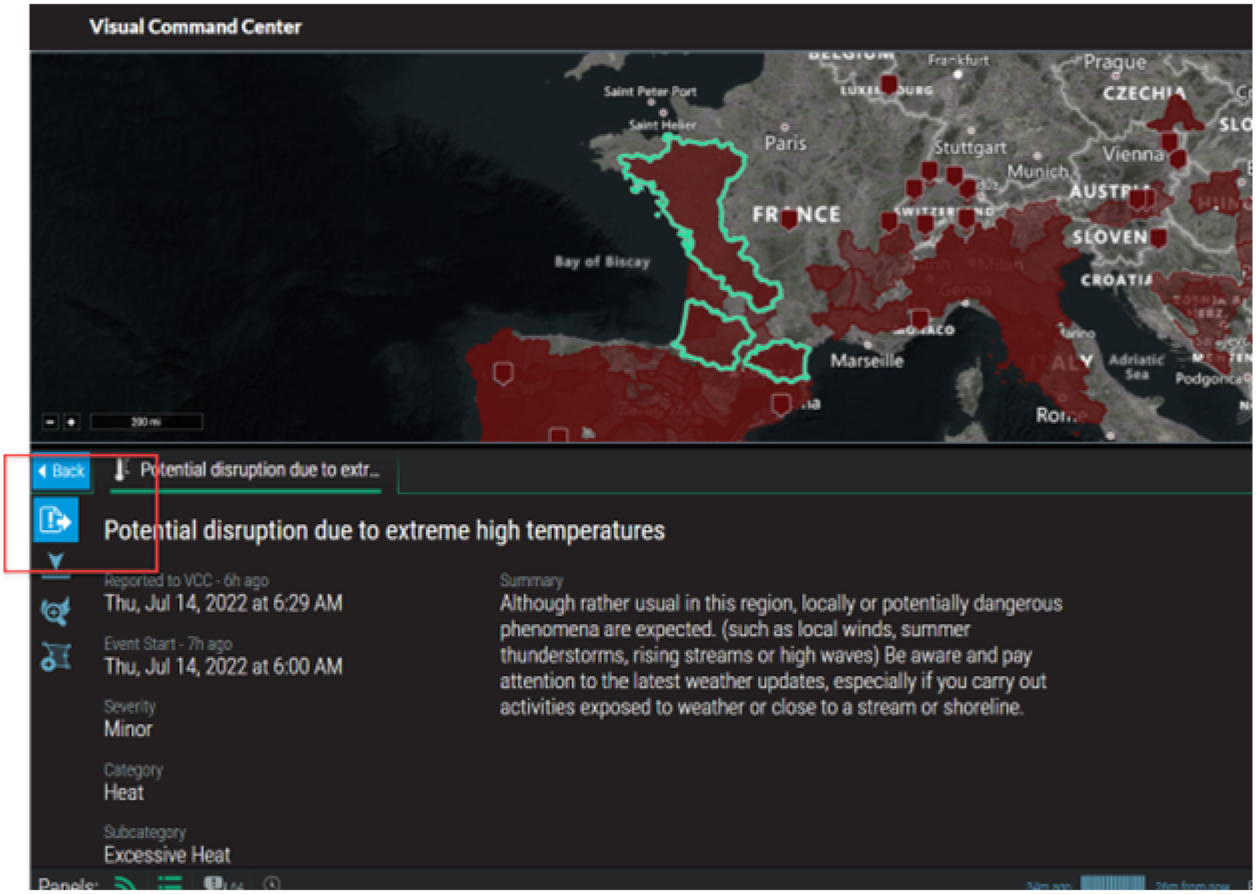
If you are not planning to send an update, you can close the Incident automatically after it has been sent.

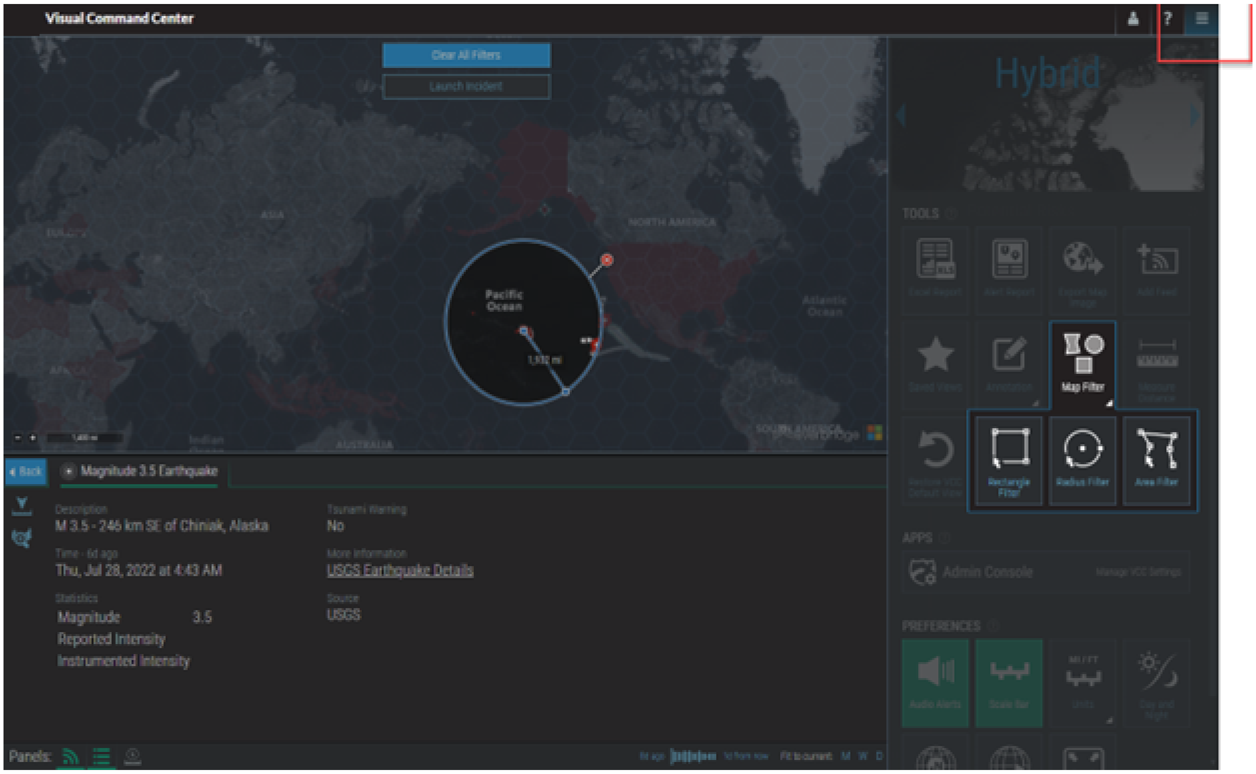
From a Risk Event

In Visual Command Center, enable the **Risk Events Feed** to display Risk Events.

1. Select a Risk Event on the map - the detail will be displayed in the panel under the map.
2. If the Risk Event has an associated polygon, on the left-hand side, select the Incident action otherwise in the menu on the top right of the browser, select **Map Filter**, draw a filter to determine the impacted area, and click **Launch Incident**.
3. Select the Incident Template you want to use - you can filter templates by categories.

4. Validate the message title, content, and options.
5. Specify the location type (select expected location for travelers) and contact types.
6. Preview and review prior to sending the communication.




Visual Command Center
Clear All Filters
Launch Incident
Hybrid
NORTH AMERICA
Pacific Ocean
TOOLS
Map Filter
Rectangle Filter
Radius Filter
Area Filter
APPS
Admin Console
PREFERENCES
Back
Magnitude 3.5 Earthquake
Description
M 3.5 - 246 km SE of Chiniak, Alaska
Thu, Jul 28, 2022 at 4:43 AM
Statistics
Magnitude 3.5
Reported Intensity
Instrumented Intensity
Tsunami Warning
No
More information
USGS Earthquake Details
Source
USGS
Panels:

Automated Communications Using CEM Orchestration

CEM Orchestration allows you to manage alerting and automated communications and efficiently respond to risk events impacting people and assets. It lets you create advanced rules and workflows to meet a wider variety of use cases.
For example, managing alerting and automated response rules through CEM Orchestration will allow you to:

- Manage all your risk management rules in one place.
- Fine-tune your rules based on what risk is reported, who is impacted (contacts), and what is impacted (assets).
- Set different alert rules for different asset types or contact types.
- Group all your risk management rules into workflows.
- Manage workflows by risk type rather than by data source.
- Utilize out-of-the-box workflows to get started with alerting and automated response, then customize those workflows as needed.
- Build new workflows and rules via the User Interface.
- Download rules from a testing or staging organization and upload them to your production environment.

CEM Orchestration allows you to set up different alerting criteria for different contact types.

Workflow, Rules, and Filters

Accessible from the Workflow page under **Settings** > **Everbridge Open** > **Workflow**, the CEM Orchestration Workflows page contains workflows, rules, and filters.

- A **workflow** is a container for organizing related rules. Each of the out-of-the-box workflows contains the rules for a single risk event category. For example, the Weather workflow contains the rules for weather events.
- A **rule**
  contains the settings for kicking off a selected action or set of actions. A rule can contain multiple filters.
  If the criteria for any filter in the rule are met, the rule's action is taken.
- A **filter** is a set of selected criteria, such as data source, event category, and impact distance. When these criteria are met, CEM Orchestration takes the action in the rule.

Within a rule, you can create very specific filters to handle different situations.

For example, the HAZMAT/Fire workflow could contain an Alerting rule. Within that rule, you could build filters for multiple use cases:

- Alert for all HAZMAT/Fire events—except wildfires—
within one mile of any of my assets.
- Alert for wildfires within 15 miles of any of my assets except the asset type Camp.
- Alert for all wildfires within 20 miles of Camp assets.

Create a New Workflow

To create a workflow:

1. Select **New Workflow**. The **Create New Workflow** dialogue box appears.
2. Enter a name for the workflow in the **Name** field.
3. Select at least one of the **Alert** or **Launch Incident** check boxes. You can also select both check boxes.
4. Select **Create**. The Workflow's Rule Configuration menu appears.

Configure Rules and Filters

After you create the workflow, you must configure the Workflows alerting rules and filters. CEM Orchestration adds one rule by default, and you can add more alerting rules if you wish.

To configure a rule, you must add a filter. To do this:

1. Under the **Sources** heading, select the check boxes for the risk events that you want to send an alert or incident for.
2. In the **Add Condition** menu at the bottom of the page, select **Severity** and select the severity options you want to send an alert or incident for.
3. Under the **Contacts and Assets** heading, select the **Contacts or Assets** check box. You can select both, but you must select one.
4. If you selected Contacts, select the contacts who will receive alerts in the following sections:

- **Contact Groups** - Contains the Organization's contact groups.
- **Contact Types** - Contains the types of contacts in an organization.
- **Location Options** - Contains the contact's locations.

5. If you selected **Assets**, select the asset types that you want to associate alerts with.
6. Select the **Impact Radius** to send an alert when a contact is within a certain number of kilometers or miles of an event.
7. Select a **time frame**. By default, an asset or contact triggers an action if it is within an event’s impact area during the event’s duration. You can use this setting to extend the impact duration by adding time before or after the event

start time. This is especially useful if you want to notify travelers ahead of their arrival at their location.

8. Select the **Action** tab.
9. From the **Add Action** menu, select either of the following actions:
    1. **Alert** - Select this option if you want to generate an alert with Visual Command Center to any affected assets.
        - Select the **Always Alert** check box to enable the action even if the event does not affect your contacts or assets.
    2. **Launch Incident** - Select this option if you want to launch an Incident when the alerting rules are met. If you select this option, do the following:
        - Select the desired Incident template from the Select Template menu - you can filter by categories.
        - Select the behavior for the Incident. You can select one or more of the following checkboxes:
            - Send Notifications on Update
            - Send Notifications on Close/Acknowledge
            - Notify All Impacted Contacts
            - Always Launch Incident
10. Repeat Step 9 for each action that you want to add to a Workflow rule

Travel-Related Use Cases

Use Case #1: As a traveler, I need to be notified of risk events up to five days ahead of my upcoming travel.

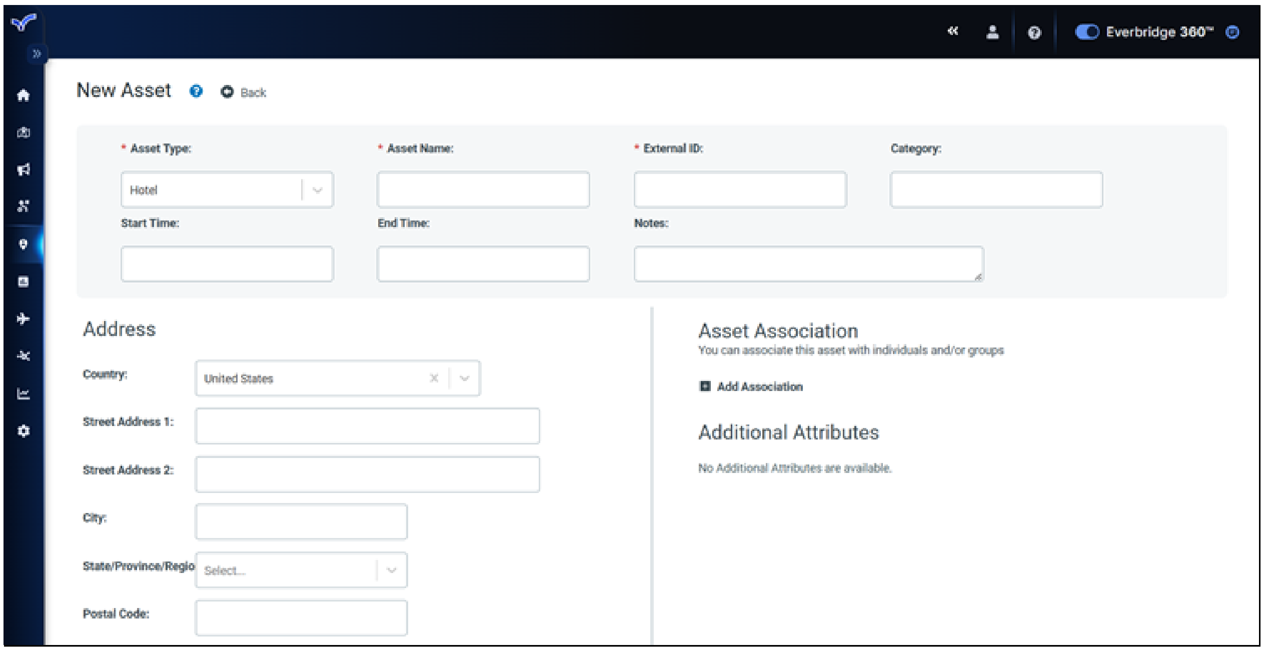
Use Case #2: As a travel manager, I would like to automate communications to travelers to reduce the time to delivery from manual sending communications.

Use Case #3: As a VIP, I would like notified of severe events, but as a traveler, I would like to be notified of severe and moderate.

For more information on how to create a workflow, rules, and filters, refer to the CEM Orchestration Guide.

Asset Management

Assets are the physical or virtual entities that your organization cares about other than contacts. In addition to traditional assets, travel-centric assets like preferred hotels, meeting venues, and events can also be loaded with custom attributes and used within communication workflows, map visibility, and correlated to Risk Events. The concept of time exists within the communication workflows to be notified of risks impacting the assets (X) days before or after.



Travel-Related Use Cases

Use Case #1: As a travel manager, I would like to monitor our preferred hotels because any impact on them could impact travelers with future travel plans.

Use Case #2: As a travel manager, I would like to monitor our corporate housing for any impact on current and future employees staying there.

Use Case #3: As a travel manager, I would like to monitor our meetings and events before, during, and after event time.

See the [Asset Management Guide] for more information on creating and managing Assets.

Member Portal

The Member Portal is an extension of the Everbridge Organization. It allows contacts and travelers to access and update their contact information, such as addresses and delivery methods.

Click here for more on configuring the Member Portal.

Executive Aircraft/Private Planes

Executive aircraft/private planes are managed by creating a contact for the plane within the Manager Portal, and then manually importing travel for that contact. Please see the **Manual Import** section for details on how to accomplish this.

Country Risk Ratings in Visual Command Center

You can use country ratings to visualize comparisons among countries for characteristics such as travel safety, health risk, crime rate, or standards of living. In VCC you can see the travel risk ratings you have set in the manager portal and manage your own set of country risk ratings. You can also add country ratings at the State/Province level. This enables you to separate contextual data and ratings at both country and state/ province levels.

Enabling Country Risk Rating

Travel Country Risk rating is available by default for all Travel Risk Management customers; however, you **must** enable the feed.

1. Open the Administrator Console and navigate to the **Feeds** menu.
2. Locate the **Context** feed. The different Context feeds add layers of information to the map. You can rename the feed at any time, and the new name will appear in the Operator Console right-side navigation pane.
3. Locate and select the **Country Risk** feed.
4. Select **Enabled**. Optionally you can restrict viewing of this feed to specified roles.
5. Select **Save.**

Setting Custom Country Risk Ratings

By default, the RIMC and Travel Risk Country Ratings Context Feed are available. The RIMC feed displays the default Country Risk Rating set in the Everbridge Risk Intelligence Management Center on a scale of 1 to 5. The Travel feed displays the Country Risk Ratings set in the **Travel Risk Management** >**Travel Risk Intelligence** in the Manager Portal. If a custom risk is set for a country, it will be displayed. Otherwise, the default risk is displayed.

To enable the RIMC and Travel Country Risk contextual feeds:

1. Navigate to the **Admin Console** and select **Country Ratings.**
2. Select **RIMC** and select **Enabled** in the top right corner.
3. Optionally, you can change the name of the feed and download the data.
4. Select **Travel** and select **Enabled** in the top right corner.

To create your own Country Risk Rating feed and add it to the map:

1. Navigate to the Admin Console and select **Country Ratings**.

2. Select **Add New Country Rating**.
3. In Create New Country Rating, type a name for the country rating.
4. Select **Create**.
5. Select either:
    a. **Download Template** - Select this to download a template .csv file that you can use to upload your country rating into Visual Command Center.
    b. **Download Data** - Select this, for example, if you already have country rating data uploaded to Visual Command Center and you want to use this in another system.
    The following table describes the country rating attributes you can configure.

Attribute	Data Type	Required	Description
Country Code	Text	Y	Must be a valid country code. (A complete list of all country ISO codes is described in the ISO 3166 international standard).
Country Name	Text		Displays in the tooltip when mouse over the country in the operator console.
State	Text		
Color Index	Number		Indicates a color intensity to use, 1 being low, and 5 high. If you leave this blank, the country is not shaded on the map. Shades and color intensity can be configured in the Country Rating Feed.
Rating	Text		Displays in the tooltip when mouse over the country. The ratings you define depend on your context. For example, Low, Moderate, Severe, Extreme or Less than 1 million, 1-2 million, and so on.
Summary	Text		A summary of contextual analysis of this custom country rating.
URL	Text		A link to a summary report that gives more information about this custom country rating.

7. Select **Upload New File**.
8. Once the file is uploaded, select **Feeds**.
9. Expand **Context** and select **Country Ratings**.

10. Select **Enabled** to enable the Country Ratings Feed on the map.
11. If applicable, select the users in the roles that can view this feed. Leave blank to make this available to all users.
12. From **Style**, select a feed color palette for each country rating type.

Viewing Country Risk Ratings

In the Operator Console, expand the **Context** feed and expand **Country Ratings**. The list of available Rating feeds is displayed. Select the ratings you want to display on the map. By default, the Travel Risk Ratings are available. It includes all the custom Risk ratings defined in the Pre-Trip country report settings in the manager portal. If no custom risk rating was defined, the default will be displayed.

- Select a Country Rating to display the corresponding countries on the map.
  - You can only select one country risk rating at a time.
- A link to the Country Intelligence Report is available from the Travel feed in the Detail panel of a selected country.

Viewing Travelers in Visual Command Center

A Travel Manager can visualize the itineraries of all travelers on the map using the Visual Command Center.

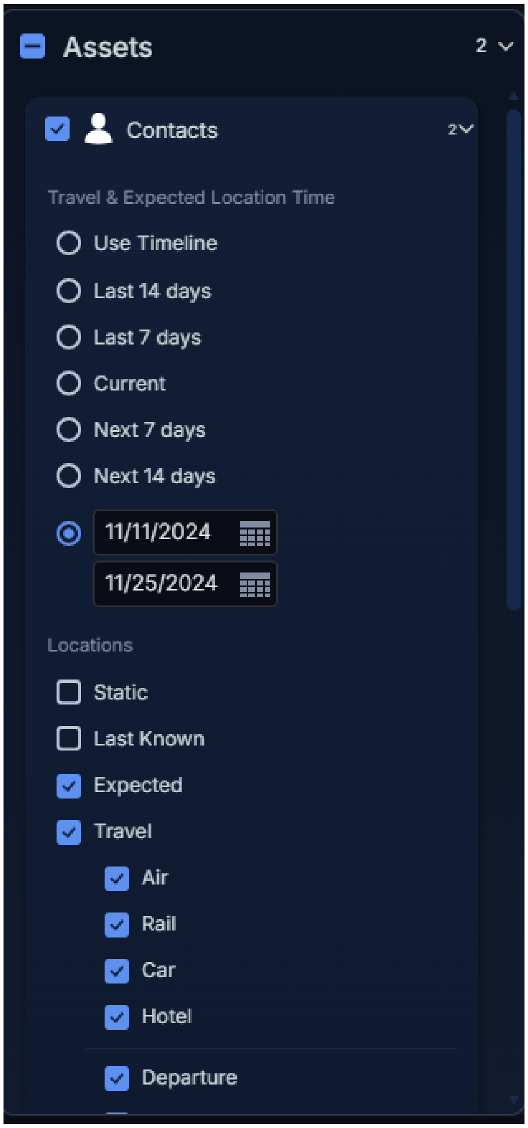
There are three ways to display travel itineraries on the Map in the Operator Console:

- Using the **Contact** feed.
- By searching for Contacts of Travel data.

Contacts Feed Filters

Using the Contact Feed filters, you can display a specific traveler itinerary on the map. In the **Asset** > **Contact** feed:

1. Select the time frame for which you want to see your Contacts.
2. Select the location type (Static, Last Known, Expected or/and Travel).
3. When Travel is selected, you are presented with additional options. You can narrow down your traveler locations by **segment types** (air, car, train, hotel) or **travel type** (domestic, international, local or non-local).
4. The travelers with travel locations matching the filter criteria will be displayed on the Map.
5. Select the traveler and in the traveler detail page, select the **Travel** tab. The itinerary will be displayed on the Map.



In the Item panel, select the traveler then select the travel tab to display the travel itinerary. You can right-click on the first segment and select Center on Map to automatically zoom In on the first travel location.

Using Quick Search

Travelers can also be displayed by searching for them or any of their travel information. The **Search** box in the **Feed Control** lets you search for items in all your data—not just items in the current Map view. A feed does not need to be turned on for you to search for its items.

You can search for travelers by name, flight or train number, hotel, car rental company, location name, airport code, or Itinerary number. The search can also be narrowed by selecting **Travel** in the dropdown and by selecting a time range under the search field.

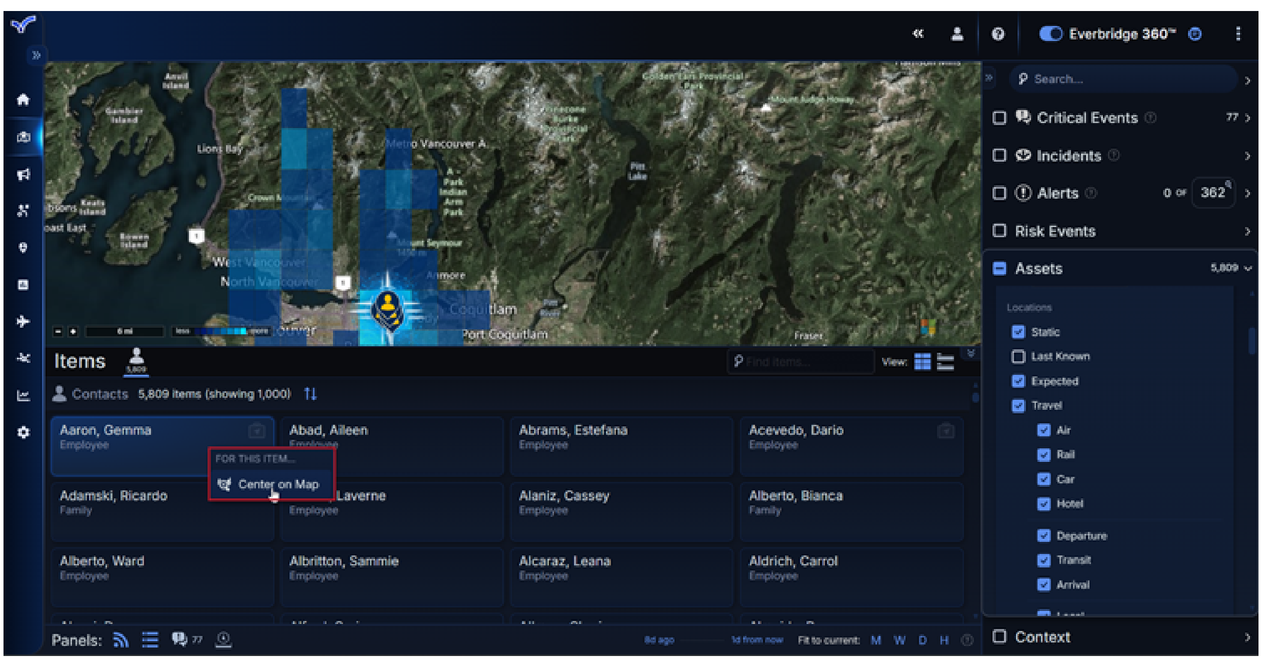
When searching for contacts, enter any of the combinations below. The more complete your entry, the more relevant your results.

- **First or Last Name**
  - Example: John returns John Smith, John Adams, Adam Johnson
- **First and Last Names**
  - Example: Jan Smith returns Jan Smith, Jane Smith, Jan Smithers
- **First, Middle(s), and Last names**
  - Example: Jo Anne Douglas Smith returns Jo Smith, Joseph Smith, Joan Marie Smith (Middle names are ignored.).
- **Last, First names**
  - Example: Smith, Jon returns Jon Smith, Jonathan Smithers

In the search results, under the contact section select the contact you were looking for. Contact details will appear in the item panel.

View Traveler Locations

In the Item panel, select the **Travel/Expected** tab to display the contact locations. You can right-click on a segment and click **Center on Map** to automatically zoom in on the selected location. Note that you will have to zoom out to see the full itinerary on the Map



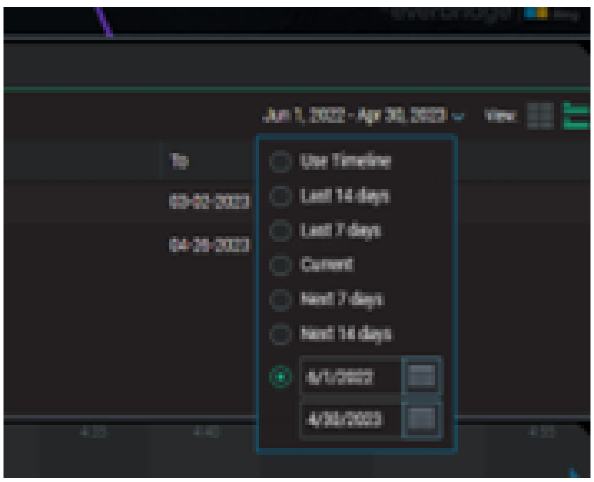
For a specific contact, by default all locations are displayed – however, you view the past six months, the current month, or all upcoming ones.

Locations can be viewed as a list or as a **Card View**. Selecting an arc line on the Map will highlight the segment in the item pane. You can fit it in the timeline or center on the map by using the option when right-clicking on the segment.

> **NOTE:** If a traveler has multiple itineraries and different PNRs (Passenger Name Records), they will be shown together.

View Traveler Itineraries

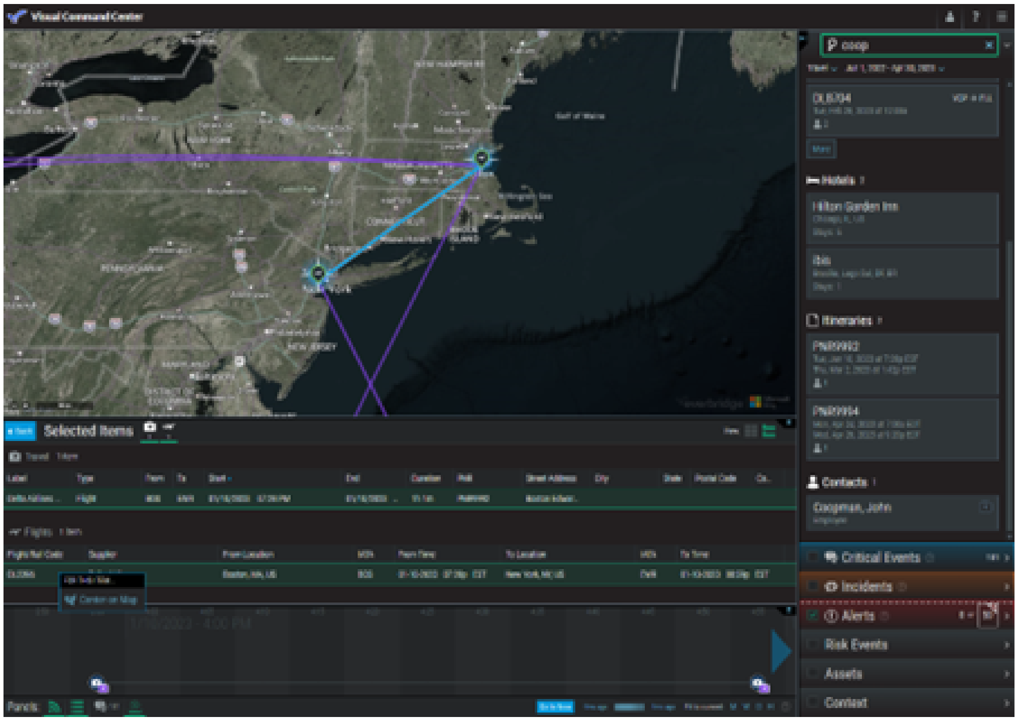
In the Item panel, select the Itineraries tab to display all contact travel Itineraries. You can narrow the view by selecting a specific time range.



Selecting an Itinerary will display the list of all segments associated with the itinerary along with arcs on the map.

You can further see the list of all travelers associated with this itinerary and also select a segment to display its details. Selecting a segment will include the full list of passengers traveling on the same segment across all Itineraries.

For example: if you select a hotel segment, it will display the list of all travelers staying at least one night at this hotel during the same time range.


Visual Command Center
Selected Items
Hotels
Hilton Garden Inn
Itineraries
Contacts
Coopman, John
Critical Events
Incidents
Alerts
Risk Events
Assets
Context
Panels

Search, Export, and Notify Travelers by Itineraries

Overview

Travel Managers and Security Officers can now access the details of traveler itineraries within the Visual Command Center with Travel Protector™. They can search for passengers on a specific plane or train, travelers who stayed at a specific hotel, or those who rented a car at a specific location during a defined time range, and then communicate with these travelers to keep them safe.

Search can be done by flight or train number, hotel name or location, car rental agency or location, PNR number, or traveler name. The operator can then view the Itinerary details, export traveler lists, and send ad-hoc Notifications to some or all travelers on those lists.

Search Query

In the **Quick Search** field, enter your search query, and select **Enter** to display the search results.
Once results are displayed you can narrow your search by selecting the type of information you are looking for in the drop-down menu.

- **All** - Includes all results.
- **Alerts** - Includes Active and Acknowledged alerts.
- **Assets** - Includes all types of assets except Contacts.
- **Context** - Includes Airports, Diplomatic Mission, Emergency Response, Hospitals, Hurricane Evacuation Routes, Storm Surge areas.
- **Incidents** – Includes all Incidents.
- **People** - Includes Contacts.
- **Places** - Includes Bing Location, Counties, Countries, States, Zip Codes
- **Risk Events** - Includes all types of Risk events.
- **Travel** – Includes all travel segment types (Flights, Train, Hotel, Car), itineraries, and travelers.

For information types that support time ranges (All, Alerts, Risk Events, Travel), a drop-down will appear to narrow your search by the time range (Past, Current, Future).

Enter a series of characters in the search field and Visual Command Center will return:

Flights

Will be returned if the characters entered matches:

- Flight number (exact match)
- Traveler name (fuzzy match)
- PNR number (Exact match)
- Airport code
- Location name (airport name, city, country)

Train

Will be returned if the characters entered matches:

- Train number (exact match)
- Traveler name (fuzzy match)
- PNR number (Exact match)
- Airport code
- Location name (airport name, city, country)

Car

Will be returned if the characters entered matches:

- Supplier name (car rental agency name)
- Traveler name
- PNR number (exact match)
- Location name

Hotel

Will be returned if the characters entered matches:

- Supplier name (hotel name)
- Traveler name
- PNR number (exact match)
- Location name

Itinerary

Will be returned if the characters entered matches:

- PNR Number (exact match)
- Traveler name
- City of departure or arrival (location name)
- Flight number
- Hotel name

- Car rental company

For each record type, five results are displayed by default. Selecting More will display five more results, and up to 100 records can be returned for each type. Record types are sorted by ascending departure times.

Viewing Travel Details

Selecting a record will display its details, such as Start and end date/time, list of travelers, from/to locations, and other details specific to the segment type. The **list of Passengers** is the list of Contacts in Everbridge Suite that were matched or created during the Itinerary import.

If a Contact is deleted from Everbridge Suite, they will no longer appear in the List of Passengers.

Flights and Trains

For Flight and Train, departure and arrival times are provided by the Booking agency and loaded via the Travel Data Feed, Rest API, or Itinerary Importer. Travel time and distance are calculated from departure and arrival locations and times.

Hotels and Car Rentals

For Hotels, the check-in and check-out times are provided by the Booking agency and loaded via the Travel Data Feed, Rest API, or Itinerary Importer to Everbridge Suite.

The number of stays reflects the number of segments booked at the hotel during the specified time range. A segment is counted as a stay when either the Check-in or Check-out times fall during the searched time range.

Example: The searched time range is January 1st to January 15th, so any travelers who stay at any point of time during this time range are counted as a "Stay." Check-in on January 5th – check-out on January 20th, check-in on December 26th – check-out on January 5th, or check-in on January 2nd – check-out on January 6th.

If during the searched time period a traveler booked multiple itineraries that include the same hotel, each segment will be counted as a “Stay” and the traveler will appear more than once on the list. (Once per stay).

This logic applies to car rental agencies as well.

Itineraries

When selecting an Itinerary, the arcs for all segments included in the Itinerary are displayed on the map.

Each segment's details provided by the Booking agency and loaded via the Travel Data Feed, Rest API, or Itinerary Importer to Everbridge Suite are listed and include:

- **Segment type**: Air, Train, Hotel, or Car
- **Flight/Rail Code**: Concatenation of the Airline/Railway code and flight number
- **Supplier**: Airline, Train line, Hotel name, or Car Rental agency
- **From Location**: City, State code, and Country code of departure
- **IATA**: Departure location IATA code (if provided)
- **From Time**: Date and time of departure (in local time)
- **To Location**: City, State code, and Country code of arrival
- **IATA**: Arrival location IATA code (if provided)
- **From Time**: Date and time of arrival (in local time)

In addition, when selecting the **Traveler** tab, all travelers in the PNR are listed with their information. Selecting the traveler will display its details.

Exporting Manifests

You can optionally export the Travelers List to a CSV format for further processing. Select a Flight, Train, Hotel, Car, or Itinerary, and select the **Export** icon on the top right corner of the Travelers List.
When exporting, travelers' details are listed (Name, External ID, Record Type, Email, and Phone Number) along with the related PNR number and details relevant to the segment types, such as departure/arrival dates and times, locations, number of nights and rate (hotel only).

Contacting Travelers

You can optionally Contact travelers by manually sending an Incident Notification. Select a Flight, Train, Hotel, Car, or Itinerary and select all or some travelers in the list and select the **Launch Incident** action on the top right corner of the list of travelers. You do not need a Risk Event or Alert to occur to launch the Incident Notification.

Select an Incident template, review and update the message title, content, and variables, then select **Launch Incident**. An Incident Notification is sent to the specified travelers using the selected template.

If no travelers are selected from the list, then the Notification is sent to all travelers.

Saved Views in Visual Command Center

Once you have focused Visual Command Center on specific assets, Risk Events, and contextual feeds, you can save this as a **View.** For example, you could pre-configure Risk Event and contextual fields in different regions so that operators can quickly and easily see a view relevant to their location. This makes it extremely easy for you to transition between different assets or locations and always maintain a relevant view on-screen.

You can share saved Views, depending on access settings. You can annotate the area of the map you want to see and save this as a View. The next time you log in to Visual Command Center, you can open your saved View and see the assets, risk events, and contextual feeds you are interested in.

1. Click the three lines.
2. Select the **Star** icon. The **Saved Views** dialog appears.
3. Click **New Saved View**.
4. In **Name**, type a name for this view.
5. Choose to make this view available to others.
6. Select **Save Changes**.

> **NOTE:** From the Saved Views dialog, you can also search, rename, share, and delete a saved View.

Everbridge Mobile

The Everbridge 360 Mobile™ App consolidates all of your Organization's Communications at your fingertips, offering resilience to users on the go without booting up a computer. It can be downloaded from either the Google Play Store or Apple App Store.

The Everbridge 360 Mobile™ App is designed to deliver pertinent information to the traveler about risk events, their travel itinerary, and pre-trip travel advisories.

On the Mobile app home page, the **My Apps** tray provides access to critical features tailored to the traveler. Safety actions such as Check-in, SOS or Safe corridor can be configured in the Manager Portal.

Geofencing

Create geofences and automatically get detailed location information when contacts are within these geofences. The privacy of the contacts is preserved as their location data is not exposed outside the predefined geofence. A push Notification is always sent to contacts when they enter such geofences.

Configuring Mobile App Buttons for Travelers

Safety buttons for the Everbridge Mobile App are configured in the Manager Portal at the Organization level from **Settings** > **Everbridge Mobile App** > **Application Options** > **Safety**.

NOTE: The maximum number of Safety buttons is 60 where the default value is 25 (including system buttons and custom buttons). The minimum number of Custom buttons is four.

Four default Safety buttons are available by default for all travelers in Everbridge Mobile App:

- **Check In** - Travelers can voluntarily check in and report their location when, for instance, they feel they are in a potentially dangerous situation.
- **Safe Corridor** - Travelers are asked to enter a preset code at regular time intervals. A missed report triggers an alert.
- **SOS** - Travelers can triggers an SOS Alert. The recording of video and audio from the mobile device can be automatically started when this button is tapped.
- **Emergency Call** - Travelers can call a preset phone number directly from the mobile app.

For any button that has been enabled, the contacts that can view or use the button in the Everbridge Mobile App can be set in the "Who can see this button?" section. There are three mutually exclusive possibilities:

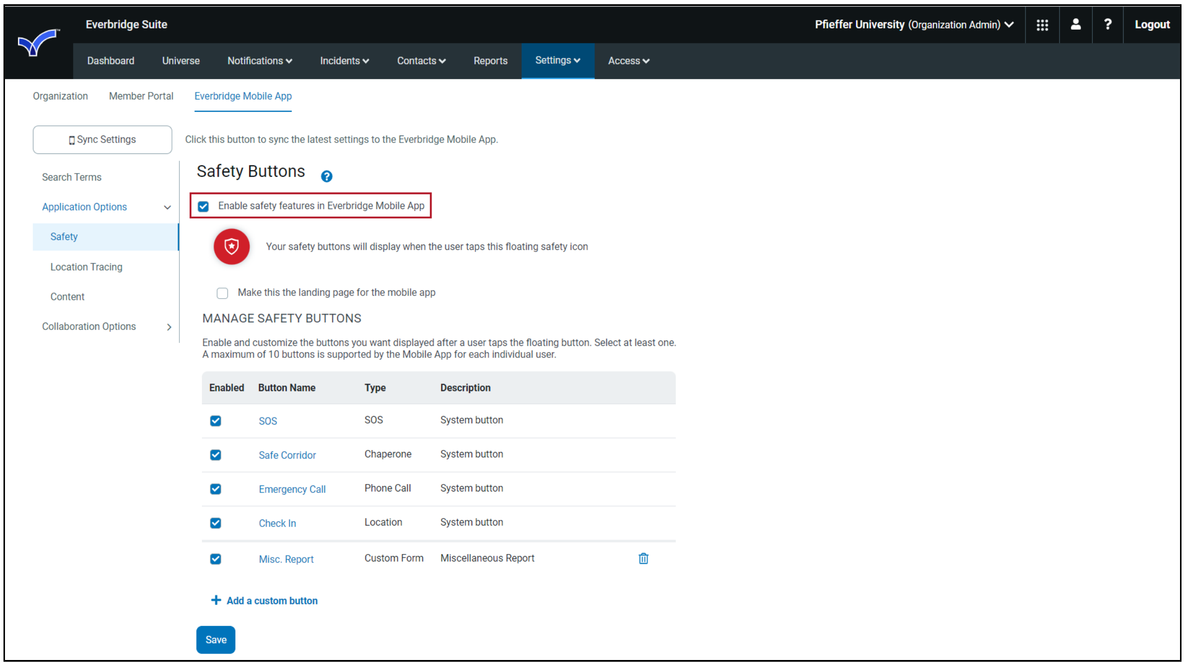
- **All Contacts** - Any contact who has access to the Everbridge Mobile App will be able to use the button.
- **Selected Groups** - One or more groups of contacts can be selected. At least one group must be selected. Only contacts who belong to the selected group(s) will be able to use the button.
- **Selected Rules** - One or more rules can be selected. At least one rule must be selected. Only contacts who match the rule(s) definitions will be able to use the button.

Enable Safety Features for the Organization

First, ensure that the Safety features are enabled for the Organization:

1. Navigate to **Settings** > **Everbridge Mobile App** > **Application Options** > **Safety** and make sure the checkbox: **Enable safety feature in Everbridge Mobile App**.
2. In the Everbridge Mobile App, the Safety buttons page is available when tapping the floating **Safety** icon. Optionally, select the checkbox: **Make this the landing page for the mobile app**. If this checkbox is selected:
   a. The Mobile App will use the **Safety Buttons** page as the default page when the application starts.
   b. After a period of inactivity of 15 minutes in the background, the Mobile App will automatically display that page when the app is in the foreground.
3. Enable any of the four default Safety buttons: **SOS**, **Safe Corridor**, **Emergency Call**, and **Check-In** by selecting the corresponding checkbox in the **Enabled** column.
4. Access the detailed configuration page of the button by clicking the button name. For example, see the SOS Button Detail page.
5. For any button that has been enabled, the contacts that can view or use the button the Everbridge Mobile App can be set in the Who can see this button? section. There are three mutually exclusive possibilities:
   a. **All Contacts** - Any contact who has access to the Everbridge Mobile App will be able to use the button.
   b. **Selected Groups** - One or more groups of contacts can be selected. At least one group must be selected. Only contacts who belong in the selected group(s) will be able to use the button.
   c. **Selected Rules** - One or more rules can be selected. At least one rule must be selected. Only contacts who match the rule(s) definitions will be able to use the button.
   d. Adjust the properties on each button. See the Button Properties available for each button in the table below.

6. Click **Save** when done.

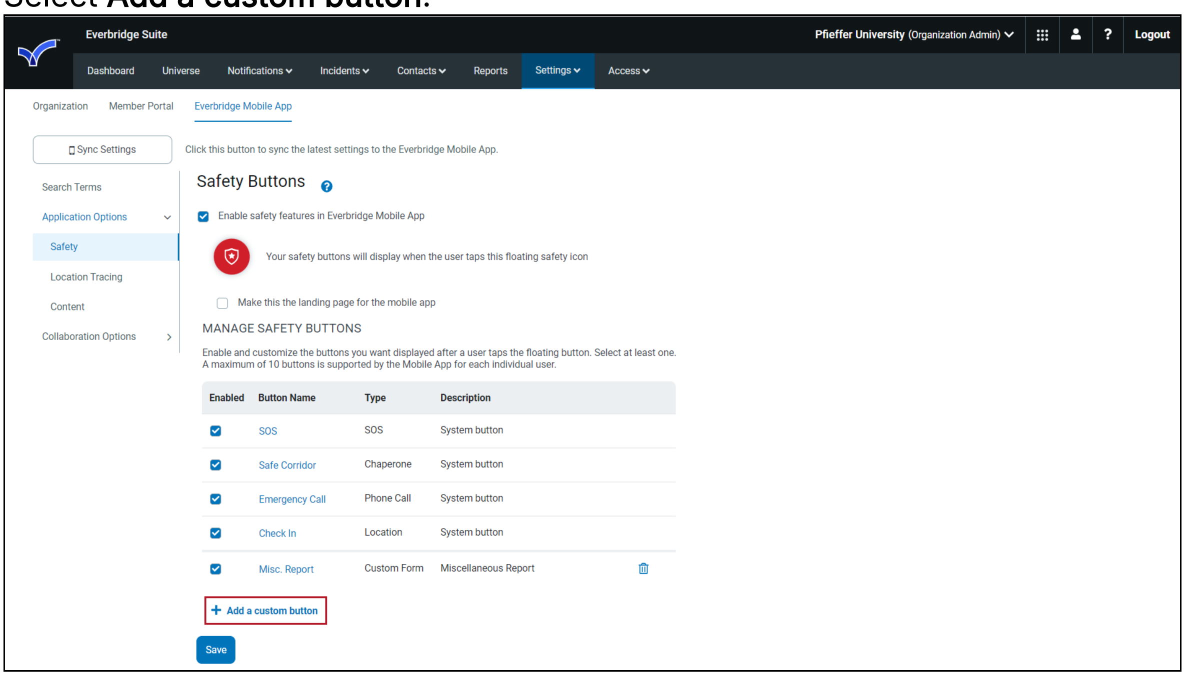


In addition to these four default Safety buttons, custom Safety buttons can be created by selecting **Add a custom button**.

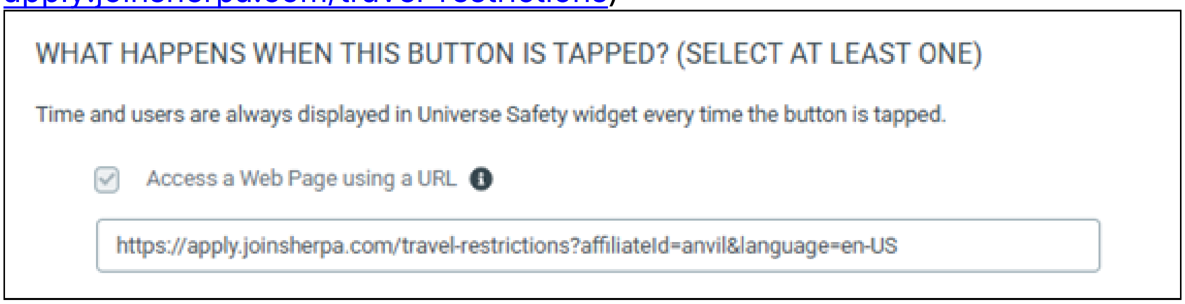
Configure the Traveler Safety Buttons

A button can be configured for the traveler to access country entry requirements. To do this:

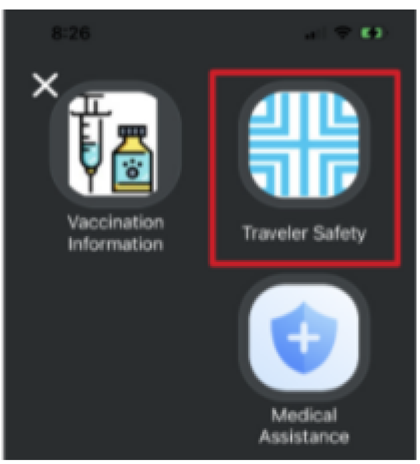
1. Select **Add a custom button**.



2. From the Type drop-down list, select **Hyperlink**.
3. Enter a Name. (This will be the display name for the button on the Everbridge Mobile App.)
4. Enter a Description.
5. Click **Replace Image**.
6. To change the image, click **Upload** on the bottom left, select the desired file, and click **Open**.
7. Adjust the size of the button with the **-** and **+** icons.
8. Click **Save**.
9. Select **WHO CAN SEE THIS BUTTON**? for the Organization. Buttons may be configured to be visible to all contacts, or their visibility may be limited based on user groups or rules.
10. Under **WHAT HAPPENS WHEN THIS BUTTON IS TAPPED?** type a message to your travelers and add the link to the Sherpa website (https://apply.joinsherpa.com/travel-restrictions)



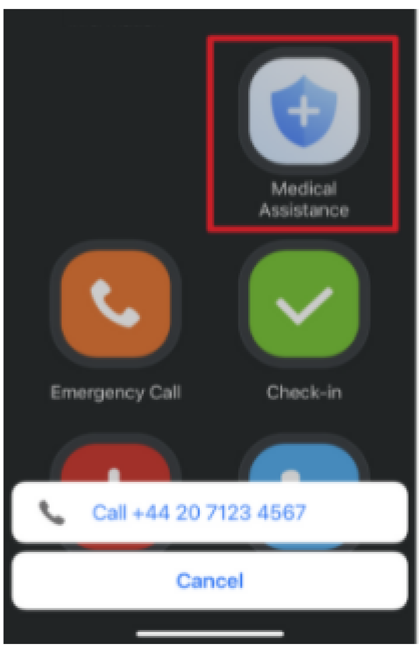
11. Click **Save** to save the button.



Configure Safety Buttons for Travel, Security, And/or Medical Assistance (Everbridge Assist)

1. Click **Add a custom button**.
2. Select Phone Call.
3. Enter a Name.
4. Enter a Description.

5. Click **Replace Image**.
6. To change the image, click **Upload** on the bottom left, select the desired file, and click **Open**.
7. Adjust the size of the button with the **-** and **+** icons.
8. Click **Save**.
9. Select **WHO CAN SEE THIS BUTTON?** for the Organization. Buttons may be configured to be visible to all contacts, or their visibility may be limited based on user groups or rules.
10. Under **WHAT HAPPENS WHEN THIS BUTTON IS TAPPED? (SELECT AT LEAST ONE)**:
    a. To create a Last Known Location on the map, check **Report user's location.**
    b. Send the user's callback number will display the number on the Universe map only.
    c. **Dial a phone number** should always be checked.
    d. Change the **Default global safety number** to the phone number you have been provided.
11. Phone numbers can be configured per country in the **Select a Country** drop-down.
12. Click **Save**.



Configure Safety Button for Country Report

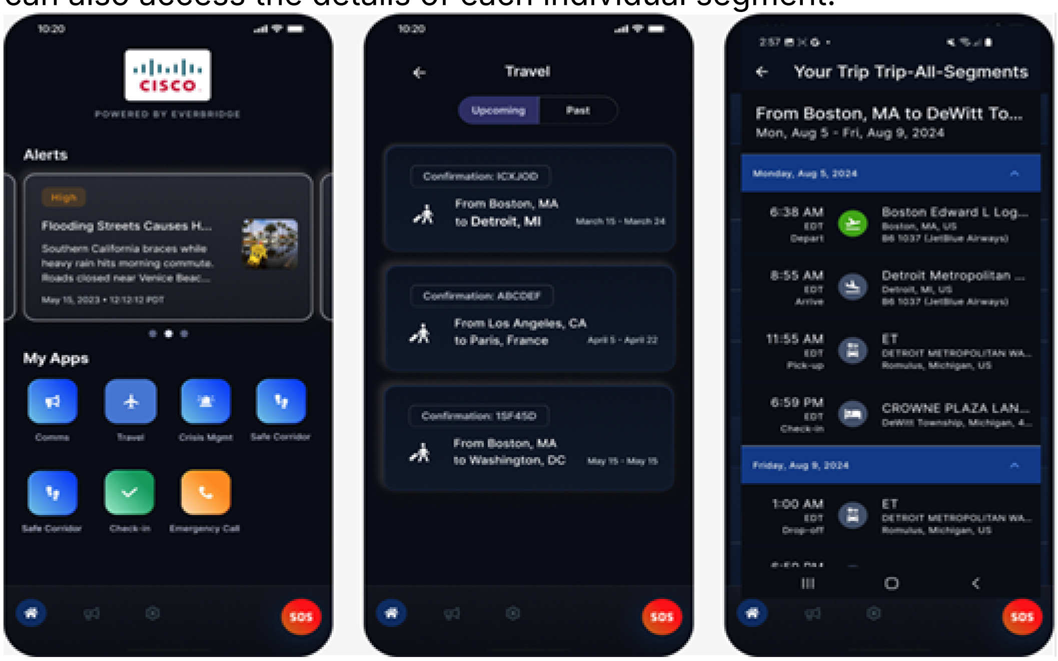
1. Click **Add a custom button**.
2. Select **Content**.
3. Enter a Name.
4. Enter a Description.

5. Click **Replace Image**.
6. To change the image, click **Upload** on the bottom left, select the desired file, and click **Open**.
7. Adjust the size of the button with the **-** and **+** icons.
8. Click **Save**.
9. Select **WHO CAN SEE THIS BUTTON?** for the Organization. Buttons may be configured to be visible to all contacts, or their visibility may be limited based on user groups or rules.
10. Under **WHAT HAPPENS WHEN THIS BUTTON IS TAPPED? (SELECT AT LEAST ONE)**:
    a. Enter the content that will be displayed in the mobile app above the country search field.
    b. Select **Show Country Report** checkbox.
11. Click **Save**.

Viewing Itineraries from the Everbridge 360 App

A system button is automatically displayed in the mobile app for all travelers who have past, current or future itineraries in the system.

When selecting this button, the traveler can see the list of past and upcoming itineraries. Selecting an itinerary allows them to see the list of all segments. They can also access the details of each individual segment.



Viewing Active Risk Events from the Everbridge 360 App

A system button is automatically displayed in the mobile app for all travelers to display Risk Events in their area.
Selecting the button open a map centered at their location.

Active Risk Events, if any, are displayed on the map. The user can zoom out, zoom in or pan the map to display a different location.

If there are more than 10 active Risk Events, a pin with the count of Risk Events is displayed in the center of the map. The user can zoom in, once the count is less than 10, individual pins appear on the map for each Risk Event.
Tapping on one of the pin open the detail of the event.

You can switch from the map view to a list view at any time. The list of all active Risk Events in the map window are displayed. Tapping on a Risk Event opens its detail a shows a detail map of the location.

Collaboration Options

Custom Directory

As an administrator, you can decide if your contacts can view all other contacts in their directory, or you can create custom directories to limit your contacts by group. Start by choosing which groups should have or be in a directory, then decide if they see other members of the same group in their directory and/or members of other groups in their directory. A contact can start a chat with anyone in their directory and can choose up to 100 contacts for a single group chat.

Chat Capabilities

Select the attachments you want in your chat capabilities: Allow file sharing in chat, or allow access to the device camera roll. From the Video Chat field, select the **Enable Video Chat** checkbox if applicable.

Secure Messaging

Secure Messaging is visible only if it is enabled for your organization. It provides compliance with industry regulations such as HIPAA (Health Insurance Portability and Accountability Act). This means hospitals and other healthcare clients can use the Everbridge Mobile application for their Secure Messaging needs, for example.

Settings

The Secure Messaging settings apply only to the messages in the Everbridge Mobile Application.
Message Expiration feature removes all messages sent to and from the Everbridge Mobile Application after the message has been stored on all Everbridge Mobile Applications for the specified period. (Select the checkbox and enter a value of 1-180 days.)

Branding

If enabled for your Organization, you can choose a custom banner. The image must be 840 x 420 with a ratio of width to height 2:1. If you want to change your custom brand, click **Choose File**, and select the new image. Click **Save** when you are done.

Remote Wipe

The **Remote Wipe and Logout** feature removes all messages sent to and from the Everbridge Mobile App for the individuals you select from Remote Wipe. You select from individuals that have their credentials logged into at least one instance of the Everbridge Mobile App.

User Guide: Everbridge Mobile App Guide

ManageBridge

Monitor and initiate communications on the go. **Everbridge ManageBridge** brings the same set of rich communications features available to administrators who frequently use mobile devices.

With ManageBridge, users can monitor and initiate communications from smartphones and tablets while on the go. ManageBridge is a free native mobile application available to Everbridge clients that gives them more control over their communications than ever before.

- Access the Everbridge platform from Apple® iOS + and Android™ devices.
- Launch secure notifications on-the-fly or from a template.
- Monitor real-time notifications through an interactive graphical reporting interface.
- Record a voice message and immediately send it to recipients or save it as a template.
- Attach an image from your smartphone or tablet to include with your Notification.