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CEM Orchestration Guide

Everbridge Suite

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CEM Orchestration Overview

This feature requires that you be able to access Alert Settings Management in Visual Command Center or have the Orchestration Rules permission in your user role. For more information, contact your Everbridge Account Manager.

CEM Orchestration allows you to manage alerting and automated communications and respond to risk events impacting people and assets. It lets you create advanced rules and workflows to meet a wide variety of use cases. For example, using CEM Orchestration, you can:

- 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 of 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.

Manage Assets to Align with Orchestration Workflows

Assets are the physical entities that an organization cares about other than Contacts. These could include such entities as clinics, ships, airports, and schools.

CEM Orchestration allows you to set up different alerting criteria for different Contact Types and different Asset Types. You can classify your Asset types according to how you want to define their alerting rules. For example, you could create Asset Types for two types of hospitals, one in a rural area and one in an urban area; this would let you configure different alerting rules around them.

To set up and manage your Assets, navigate to **Settings** > **Organization** > **Contacts /Assets** > **Asset Type**. For a complete set of directions on how to set up and manage assets, see the [Asset Management Guide](#).

Asset Tags

Asset tags are additional attributes that allow users to organize and group Assets for alerting and Notification purposes. Building CEM Orchestration rules around multiple Asset attributes increases your ability to articulate and leverage distinctions among subsets of Assets in order to target alerting and communications more precisely.

Adding the "Tags" Attribute to an Asset Type

A **Tag Set** must first be configured for any Asset Type that will use tagging. To do this:

1. Navigate to **Settings** > **Organization** > **Contacts/Assets** > **Asset Types**.
2. Click the **pencil** icon next to the desired Asset type. The **Edit Asset Type** page appears.

3. Select the **New Asset Attribute** button. The New Asset Attribute modal opens.
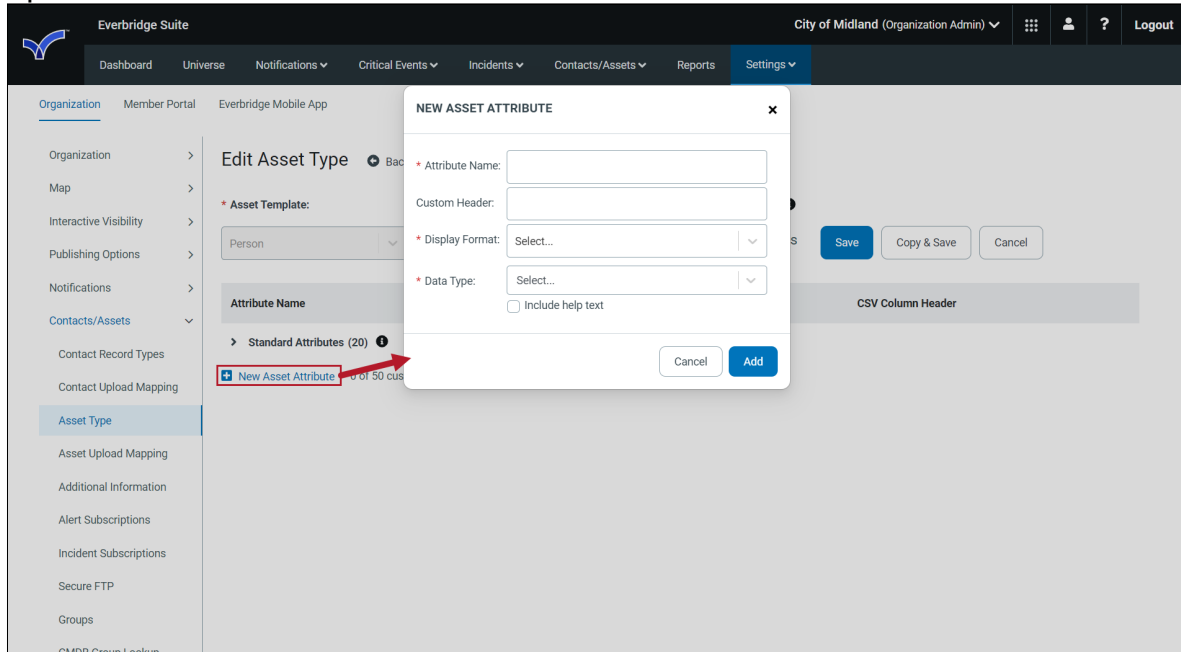
4. Fill in the fields as follows:
    - **Attribute Name**: Tags
    - **Display Format**: Multiple Selection List
    - **Data Type**: Text

5. Add and arrange your **Option Labels**, which are required fields after selecting the **Text** data type.

NEW ASSET ATTRIBUTE   ✕

* Attribute Name: | Tags |

Custom Header: | |

* Display Format: | Multiple Selection List ⌄ |

* Data Type: | Text ⌄ |
☐ Include help text

Option Label

≡ | Region: North | ⊗

≡ | Region: South | ⊗

≡ | Region: East | ⊗

≡ | Region: West | ⊗

➕ Add another option

Cancel   **Add**

6. Click **Add**. The modal will close, and you'll see the new **Tags** attribute listed below the Standard Attributes in the list.

7. Click **Save** to finish. Repeat this process for any Asset Types that will be utilizing tagging.

Adding Tags to Assets

To add Tags to your Assets:

1. Navigate to **Contacts/Assets** > **Assets** > **Asset List**.
2. Click the **pencil** icon next to the Asset that needs to be tagged. The **Edit Asset** page appears.

3. Select the appropriate Tags from the **Tags** dropdown in the **Additional Attributes** section to the right.

4. Click **Save**. Repeat this process for any additional Assets that need to be tagged.

Using Tags in Your Assets Filter Condition

Once the Assets have been tagged, those tags can be used in the CEM Orchestration Workflow Filter conditions to more precisely target alerts or Notifications.

To do this:

1. Navigate to **Settings** > **Everbridge Open** > **CEM Orchestration** > **Workflows**.
2. Select the desired **workflow**, or create a new one.
3. In the **Filters** section, add a **Contacts and Assets** condition if one doesn't already exist.
4. Use the **Asset Tags** control to select Tags for Asset filtering. To match, Assets must be one of the selected Asset Types and have at least one of the

selected Asset Tags.

NOTE: If you want the filter to match Assets without Tags, click **Select All**. This will match all potential configurations for Tags, including no Tags.

CEM Orchestration Workflows

To access the **Workflows** page, navigate to **Everbridge Open** > **CEM Orchestration** > **Workflow List**. Typically, a set of default workflows will be set up for you.

The Workflows page has two views – a compact list view that shows one workflow per line, and a card view that shows some information about each workflow.

What is a 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 one or more actions. Each rule can contain multiple groups of settings, called filters. If the conditions in any filter in the rule are met, the rule's action is taken. Creating alerts is the default action for all rules. An optional additional action is launching an incident.

A **filter** or **filter set** is a set of selected conditions, such as data source, event category, and impact distance. When these conditions are met, CEM Orchestration takes the action(s) in the rule. Within a rule, you can create specific filters for different situations.
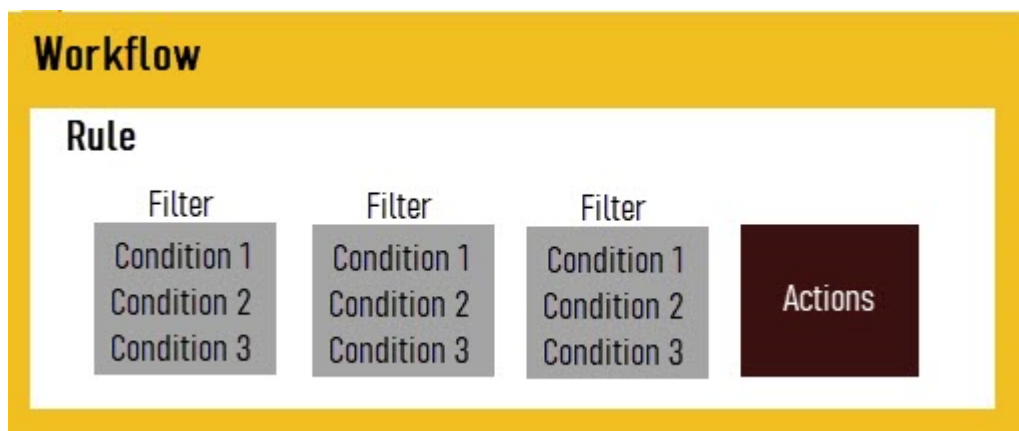
NOTE: To use different conditions, create a new **filter**. To take different actions, create a new **rule**.

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.

When all of the conditions for any of these filters are met, the rule's action—create an alert—is initiated.

This image shows the parts of a workflow as they appear on the **Orchestration Workflows** page.

Access the Workflows Page

To access the Workflows page, from the Organization level, navigate to **Settings > Everbridge Open > CEM Orchestration > Workflow List.** A set of default workflows may have been set up for you.

Create Workflows

You can create or edit new workflows on the **Workflows** page.

Create a new workflow

To create a workflow:
1. Click **New Workflow**. The **Create New Workflow** dialogue box appears.
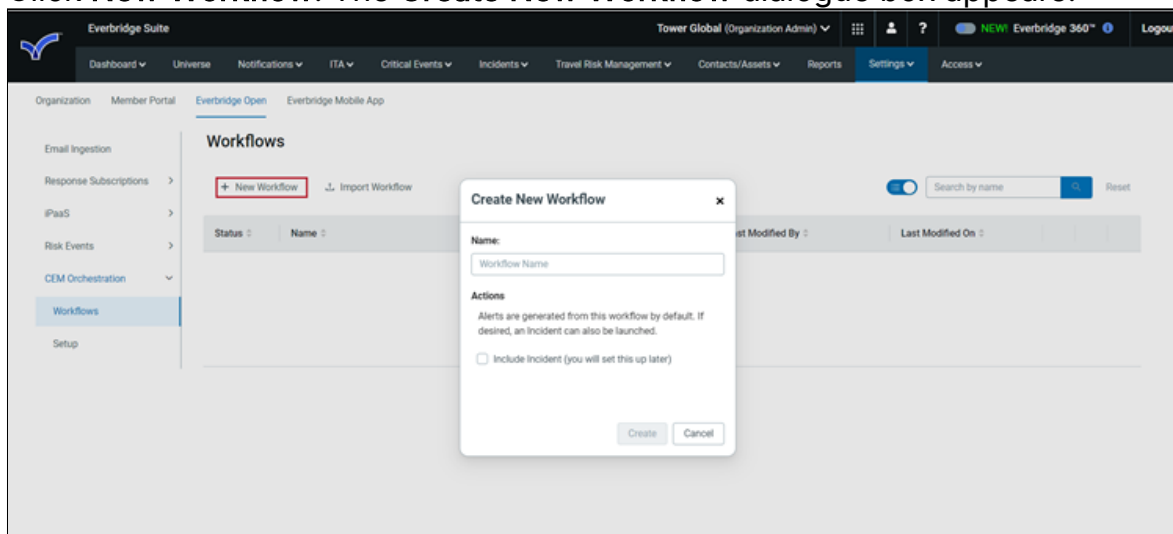
2. Enter a name for the workflow in the **Name** field.
3. All workflows can create alerts; if you also want this workflow to launch Incidents (to send Notifications to your contacts), select the Include Incident checkbox.
4. Click **Create**. The Workflow's Rule Configuration menu appears.
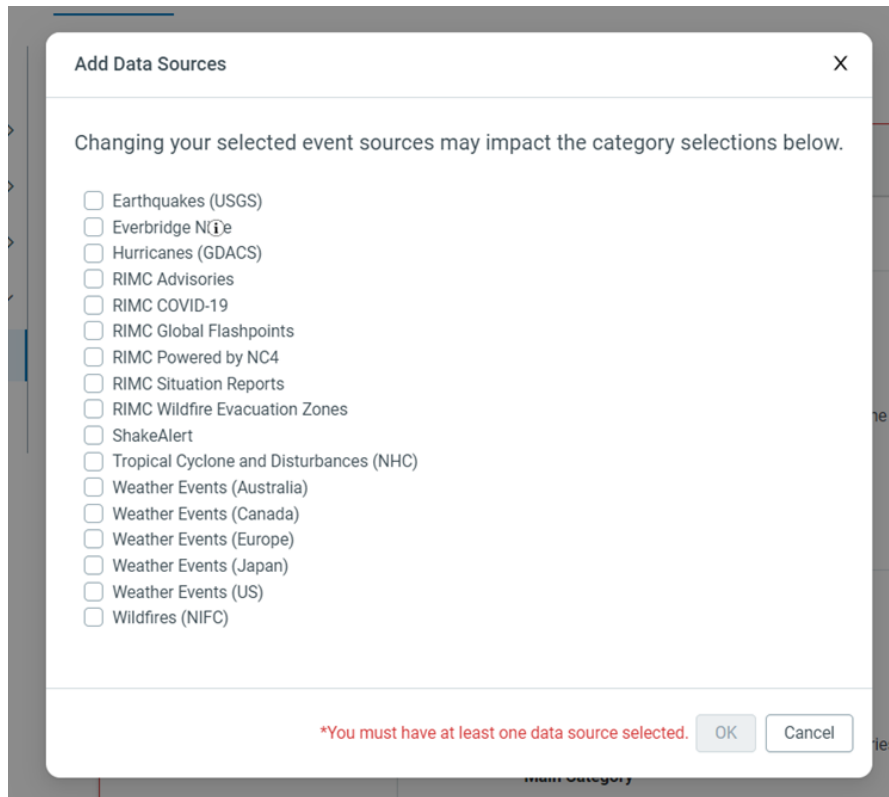
Configure Rules and Filters

After you create the workflow, you must configure the alerting rules and filters. CEM Orchestration adds one rule by default. Each rule can launch one set of actions; to launch multiple sets of actions, you can add more alerting rules.

To configure a rule, you select one of its filter sets and change the settings described below. For examples of settings for a variety of use cases, see the Use Case Examples.

1. Under the **Sources** heading, select the checkboxes for the Risk Events that you want to send an alert for. Note that the data sources **Operator Entered Risk** and **Mobile Safety** cannot currently be managed through Orchestration; you can manage these through **Alert Settings** in the Visual Command Center

Admin Console.

2. Under the **Contacts and Assets** heading, select the **Contacts or Assets** checkbox. You can select both, but you must select one.
3. If you selected **Contacts**, select the contacts who will receive alerts in the following sections:
   - **Contact Groups** - From the list, select the groups you want to alert or **Select all** to alert all contacts, including those not in groups.
   - **Contact Types** - From the list of Contact Types, select the types you want to alert on, or **Select All** to alert for contacts of all types.
   - **Location Options** - Contains the contact's locations.
     ◦ Static: for example, a contact's home or office
     ◦ Expected: for example, a temporary assignment
     ◦ Travel: a location associated with a Travel Itinerary
     ◦ Last Known: a location where the contact reported their location by (for example) swiping their ID into a building security system, checking in, or initiating an SOS from the Everbridge Mobile app.
   - **Contact Rules** - Select a Contact Rule to leverage existing dynamic contact rules, which allows fine-tuning of alerting and automated response to Risk Events based on contact attributes.
4. If you selected **Assets**, select the asset types that you want to associate your alerts with.
5. Select the **Impact Radius** to send an alert when a contact is within a certain number of kilometers or miles of an event.

6. You can add several additional alerting conditions to the filter. Scroll down to the Add Condition menu at the bottom of the page, and select one or more of the following:

- **Severity:** This is the severity of the Risk Event as reported by the risk data source (e.g., National Weather Service, Everbridge RIMC (Risk Intelligence Monitoring Center).
- **Category:** Risk Events are grouped into one of 12 standard categories. For many categories, a set of subcategories is presented. You will only see categories and subcategories that are valid for the risk sources you have chosen.
- **Time Frame:** By default, an alert only results when assets or contacts are in the impact area between the start and end of the event. Use this setting to extend the impact duration by adding time before or after the event start time.
- **Magnitude, Wind Swath, Significance:** These are specialized conditions that each apply only to a single data source:
    - **Magnitude:** Magnitude is a measure of earthquake intensity that is valid only for earthquakes reported by the data source Earthquakes (USGS). For these events, you can use Magnitude in place of or in addition to Severity. Use the Magnitude in filter sets where Earthquakes (USGS) is the only data source; If you include another data source in the same filter set, the Magnitude condition will not be available. Use the minimum and maximum fields or the slider to select a Magnitude value between 2.0 and 10.0.
    - **Hurricane Wind Swath:** Wind swaths are geographic areas experiencing hurricane winds of different speeds. You should use Wind Swath in place of Severity for hurricanes reported by the data source Hurricanes (GDACS). Use the Wind Swath condition in filter sets where Hurricanes (GDACS) is the only data source; If you include another data source in the same filter set, the Wind Swath condition will not be available. To get alerts for assets only in the area experiencing the most intense wind, choose 120mph as the value of the Wind Swath condition. To get alerts for assets in a wider area, choose 90 mph or 60 mph as the minimum wind speed. Or, to get alerts for assets in the projected path of a

hurricane, choose the value "Projected path of hurricane."

- Significance is a measure of probability and severity used by the US National Weather Service (NWS). Consider using Significance in place of or in addition to Severity for events in the **Weather Events (US)** feed. Use this condition in filter sets where Weather Events (US) is the only data source. If you include another data source in the same filter set, the Significance condition will not be available. Significance values are:
  - **Watches** indicate conditions are favorable for a significant weather event to develop
  - **Warnings** indicate hazardous conditions are expected and you may have to take action, such as delaying travel, staying indoors, dressing for extreme weather, or evacuating.
  - **Advisories** indicate a type of weather is expected that is not severe enough to merit a warning, but which may cause significant inconvenience or make travel hazardous.

7. When you have completed defining the conditions in a filter, you can add additional filters (See Additional Filters, below) until all of your use cases in the current workflow are covered.

8. Edit the rule's action(s). Remember that when the conditions are met for any filter in the rule, the defined actions are taken. To define actions, click the Action tab.

9. On the Actions tab, select any of the following options:
   - **When to Alert?** – By default, Orchestration creates alerts only when your selected contacts or assets may be affected. If you want to enable alerts even for Risk Events that do not affect your contacts or assets, select the **Always Alert** checkbox.
     - Note that this may result in a high volume of alerts.
     - This checkbox can't be selected if any of the filters in this rule include the Self Service or Dataminr risk sources, as the volume of events in these sources can create too much noise.

- **Incidents** - Click the **Add Action** button. Select this option if you want to launch an Incident when the alerting rules are met. You can add multiple Incident Actions to a rule. For example, one Incident Action to notify Contacts in an alert area of the potential threat and another, with different content, to notify security personnel of the threat and the closest assets. You must use a different Incident template for each instance of the Launch Incident action that you add to the Workflow rule.

10. For each Incident Action, do the following:
    - Select the Incident category from the Filter by Category menu.
    - Select the desired Incident template from the Select template menu.
    - Select the behavior for the Incident. You can select one or more of the following options:
        - **When to Launch?** If you have selected Always for When to Alert?, and you also want to launch Incidents even for Risk Events that are not near your Contacts or assets, select the **Always** checkbox.
        - **Who is Notified?** When Orchestration launches an Incident, Notifications are sent to Contacts specified in the Incident template. If you also want to notify Contacts in the alert area, select the option AND any people in the event area.
        If you have selected any Contact options (such as Contact Type, Location Type, or Groups) in your filters, only Contacts who match the selected options are notified. So, for example, if you have selected the Contact Type **Employee** in your filter, and chosen to notify Contacts in the alert area, only Contacts in the area with the Employee type are notified.
        - **When to Notify?** By default, when an Incident is launched, Notifications are sent, and the Incident is then closed automatically. To keep the Incident open and send subsequent Notifications, select updated and/or closed or acknowledged. When either of these is selected, the Incident remains open until the Risk Event is closed or the alert is acknowledged.
11. Repeat the steps above for each Action that you want to add to a Workflow rule. Then save the rule.

> **IMPORTANT:** You **must** use a different Incident template for each instance of the **Launch Incident** action that you add to the Workflow rule.

Adding More Rules to a Workflow

You can add additional rules to a workflow. Each rule will have its own set of Actions. To add rules:

1. Select a workflow.
2. Below the workflow name, click **Add Rule.** A new rule page with a single filter set is created.

Depending on the Risk Event Feed, some filters will appear while others will not. For example, the **Wind Swath** filter would only appear for weather events, such as a Hurricane.

Adding More Filter Sets to a Rule

You can add additional filter sets to a rule. To do this:

1. On the right-hand side of the page, under the toggle, click **Add Filter.** A new filter page with options appears.
2. Follow the steps under "Configure Rules and Filters" to configure the new filter set.

Edit a Workflow

To edit a Workflow:

1. Locate the Workflow that you want to edit and click its name. The Workflow rules page appears.
2. Make any necessary changes.
3. Click **Save**.

Delete a Workflow

To delete a Workflow:

1. Locate the Workflow that you want to delete and click the **Trash** icon. A confirmation window will appear.
2. Click **Delete.** A confirmation message will appear.

Import a Workflow

You can use the import feature to import an existing workflow—for example, a workflow from a test Organization.

To import an existing workflow into your CEM Orchestration Workflows:
1. Click **Import Workflow.** The Import dialog appears.
2. Click **Choose File.** Your system's File Manager appears.
3. Select the file that contains the workflow.
4. Click **Import.**
5. An onscreen message will list any Risk Sources, Contact Types, and Contact Groups that are in the imported workflow but not in the destination Organization. These will not be included in the import.
6. **Save** the workflow.

Settings that are retained from Imported workflows include:
- Workflow, rule, and filter names
- Workflow and rules statuses (enabled/disabled)
- Risk Sources (if they are available in the destination organization)
- Categories and subcategories
- Impact Radius
- Most conditions, including Severity, Time Frame, Magnitude, Significance, Wind Swath
- Asset Types   (if they are available in the destination organization)
- Contact Location Options

Enable and Disable Workflows and Rules

Workflows and rules each have On/Off controls; this lets you edit a workflow or rule while it is disabled and not generating alerts.

When a workflow is **Off**, all of its rules are Off and none of the Actions in any rule are taken.

When you toggle a disabled workflow **On**, all of its rules are turned On. If you want some rules enabled and others disabled, use the On/Off toggle for each rule.
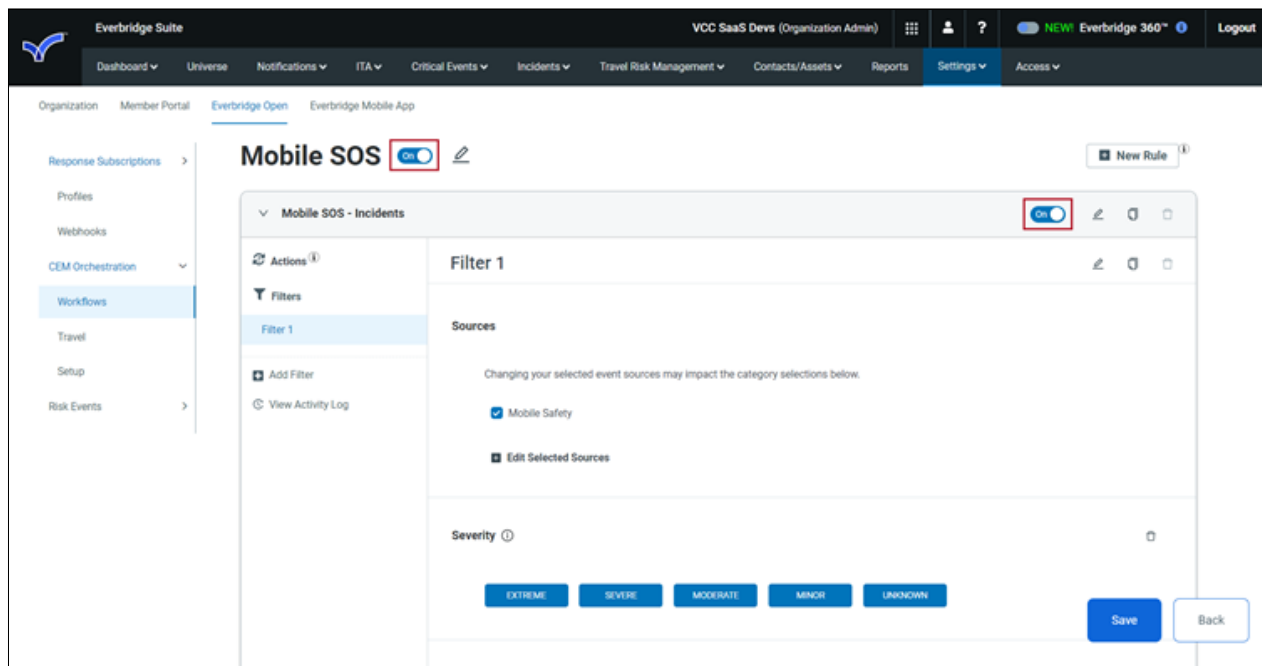
Workflows that have some rules enabled will appear as toggled **On.**

CEM Orchestration Use Case Examples

Through CEM Orchestration, you can create combinations of workflows, rules, and filter sets to accommodate a wide variety of use cases. Use the sections below as models to help you create the alert settings that meet your needs.

- Use Case: Change the Severity Threshold for Alerting
- Use Case: Change the Impact Radius for a Risk Event Category
- Use Case: Vary the Impact Radius Depending on the Event Severity
- Use Case: Apply Always Alert to One Risk Type
- Use Case: Create Alerting Criteria by Asset Type
- Use Case: Create Alerting Criteria for Contacts
- Use Case: Set Up Automated Incident Notifications
- Use Case: Add Alerting Rules for a Self-Service Risk Event Feed

Use Case: Change the Severity Threshold for Alerting

The **Severity of Risk Events** is one of several conditions you can change in your filters. To set a new severity threshold for alerting, find the workflow and rules you want to change and then edit the Severity Threshold for each.

For example, if you need to adjust the Severity of Crime events:

1. Navigate to **Settings** > **Organization** > **Everbridge Open** > **CEM Orchestration** and open the **Workflow List** page.
2. Click the **Crime** workflow.
3. Select a rule. By default, this workflow will have one rule that will open automatically.
4. Select a **Filter** tab. The default workflow will have one filter that will open automatically.
5. Confirm that the **Category** condition is set to **Crime**.
6. Adjust the **Severity Level** as needed.
7. Select all Severity Levels that apply. For example, to alert on any Risk Events with moderate or higher Severity, select the Moderate, Severe, and Extreme levels.
8. If no Severity condition is shown, you can add one. Click **Add a Condition** at the bottom of the page and select **Severity** from the menu.
9. Click **Save.**

Each rule could have more than one filter. You need to make this adjustment for each filter where you want to set a Severity Threshold.

Use Case: Change the Impact Radius for a Risk Event Category

The **Impact Radius**, or Alert Radius, establishes the potential impact area for a Risk Event when the location is a point (not a polygon) on the map. When an Asset is detected within this Impact Radius during an event's duration, Orchestration creates an alert. The larger the Radius, the more alerts are likely to be created. The Radius does not apply to risk events whose location is a polygon on the map. For polygon events, the Alert Area is the area within the polygon.

The Impact Radius is one of several conditions you can change in your filters. To change the Radius for a Risk Event Category:

1. Navigate to **Settings** > **Organization** > **Everbridge Open** > **CEM Orchestration** and open the **Workflow List** page.
2. Select the workflow you want to change.
3. Select the rule and filter you want to change.
4. Scroll to the **Impact Radius** setting at the bottom of the page.
5. Use the drop-down menu to switch between miles and kilometers as desired.
6. Enter a new distance or use the Impact Slider to change the Radius.
7. Click **Save.**

Use Case: Vary the Impact Radius Depending on the Event Severity

Frequently, organizations will want to use a larger **Impact Radius** for high-Severity events than for events of lower Severity. With an Orchestration rule, you can do this by creating separate filters, one for the more severe events, and one for events that are expected to have a smaller, more local impact.

When you need to use different conditions, create a new filter. If you need to take different actions, create a new rule.

In this example, we want to use a different condition (a larger Impact Radius) for Crime events with a severity of Severe or Extreme, and a smaller Radius for events with a Severity of Moderate or Minor:

1. Navigate to **Settings** > **Organization** > **Everbridge Open** > **CEM Orchestration** and open the **Workflow List** page.
2. Click on the **Crime** workflow.
3. Select a **rule**. By default, this workflow will have one rule that will open automatically.
4. Select a **filter**. The default workflow will have one filter that will open automatically.
5. Confirm the category condition is set to **Crime**.
6. For the **Severity** condition, select Extreme, and Severe.
7. Adjust the **Impact Radius** condition to the desired value.
8. Click the filter's **Copy** button. A duplicate filter is created.
9. Select the tab for the duplicate filter.
10. Scroll to the Severity condition and change the selections to Moderate and Minor.
11. Adjust the Impact Radius condition to the desired value—a smaller radius for these events.
12. Use the **Edit** button on the tab to give the filter a meaningful name.
13. Click **Save.**

Use Case: Configure Asset Tags for CEM Orchestration Workflows

Asset Tags are highly customizable additional attributes that allow you to organize and group your assets for alerting and notification purposes. Building your CEM Orchestration rules using Asset Tags increases your ability to articulate and leverage distinctions among subsets of your assets so that you can target your alerting and communications more precisely.

Setting up Asset Tags for use in CEM Orchestration workflows is a three-step process involving **Asset Types**, **Assets**, and **Workflows**.

Step 1: Add and configure a "Tags" attribute on your Asset Type

1. Access the **Asset Type** page in the Manager Portal by navigating to **Settings** > **Organization** > **Contacts/Assets** > **Asset Type**.
2. Click the pencil icon next to the name of the Asset Type you wish to edit. This will put the selected Asset Type into edit mode.
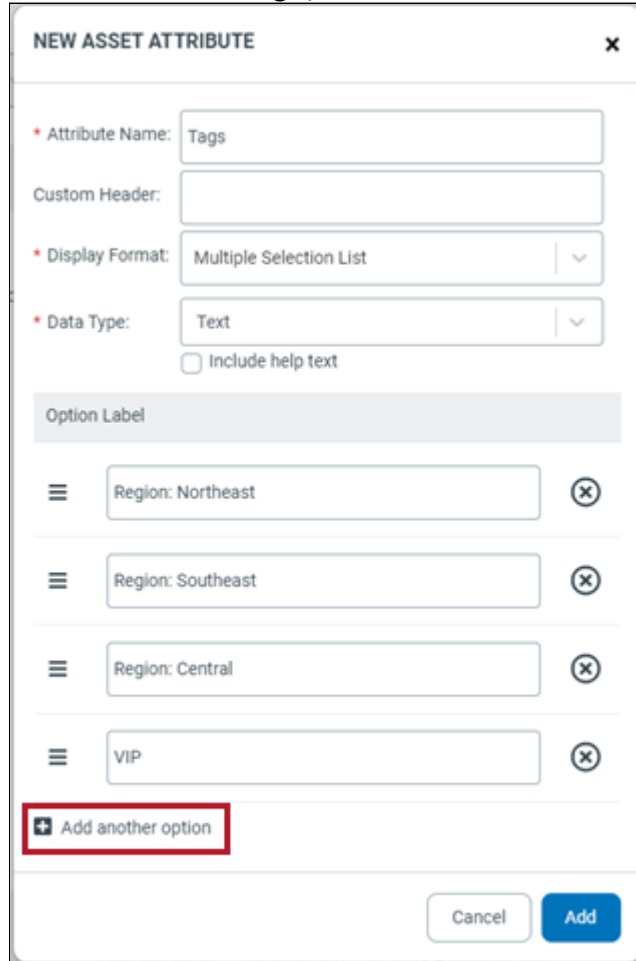

3. Add a new Asset Attribute.
   a. Click the New Asset Attribute button at the bottom of the Asset form.
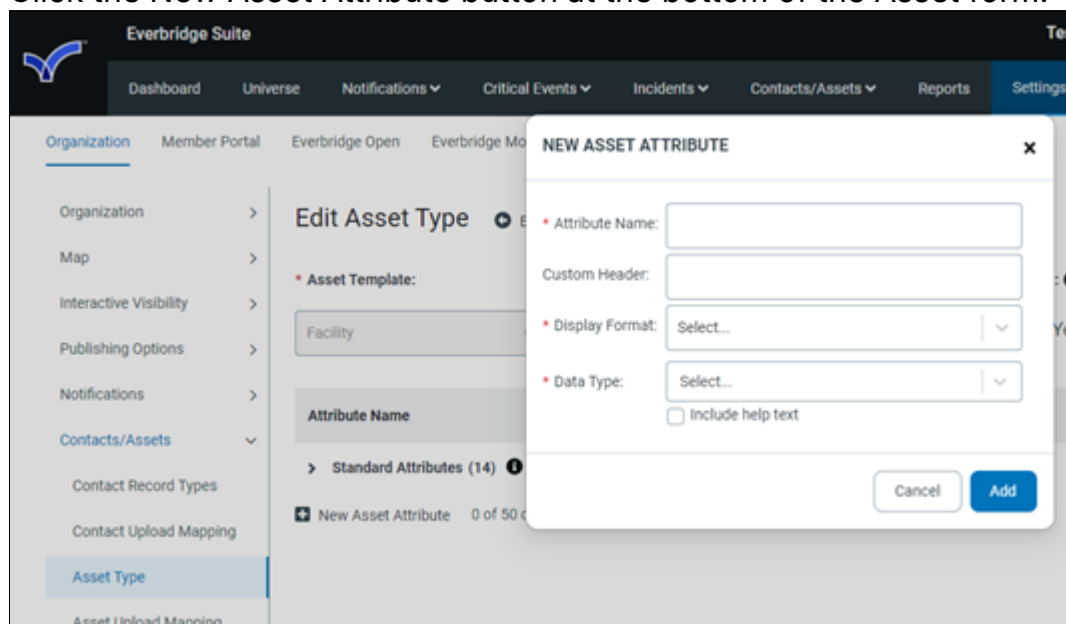
   b. Fill in the required fields on the New Asset Attribute dialog:

- **Attribute Name:** "Tags"
- **Display Format:** Multiple Selection List
- **Data Type:** Text

c. Add an Option Label for each asset tag you wish to create. If you need more than four tags, use the **Add Another Option** button as necessary.

d. When you have added all the tags you want, click **Add.**

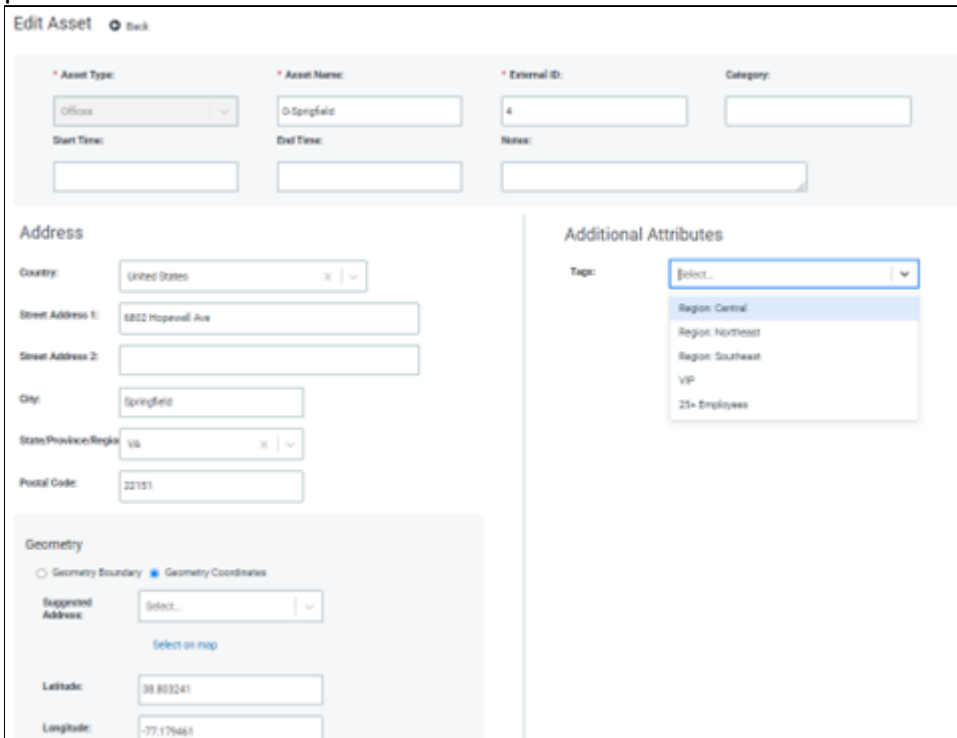4. Click **Save.**

5. Repeat for any Asset Type that needs tags.

TIP: Tags must be configured on every type that contains assets you wish to tag. If you have not added a "Tags" attribute to an Asset Type according to the instructions above, no tags will be available to assign to assets of that type.

Asset Tags can be unique to a particular Asset Type or they can be shared across Types. For example, you could have a "Region: Northeast" tag on both the Offices and Data Centers Asset Types but reserve a "VIP" tag for
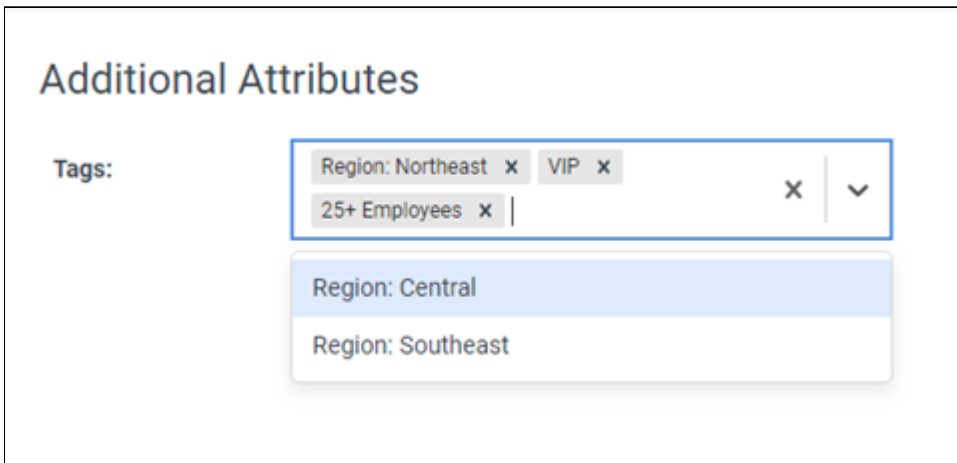
Office-type assets. If you wish to use a tag on more than one type of asset, simply include it in the Asset Type definition for every type that will use it.

Step 2: Add tags to your individual Assets

1. Access the **Asset List** page in the Manager Portal by navigating to **Contacts/ Assets** > **Assets** > **Asset List**.
2. Click the pencil icon next to the name of the Asset you wish to edit. This will put the selected Asset into edit mode.


3. Select the appropriate tag(s) from the **Tags** dropdown under **Additional Attributes**.

- You can add multiple Tags to an Asset. You can also remove Tags from an Asset by clicking the X to the right of the tag name in the Tags control.

4. Once you have added all the tags you wish to add, click the **Save** button.
5. Repeat for any additional Assets you wish to tag.

Step 3: Use tags in the Assets filter condition in your CEM Orchestration Workflow

1. Go to your Workflows page by navigating to **Settings** > **Everbridge Open** > **CEM Orchestration** > **Workflows**.
2. Open the Workflow you wish to configure to use Asset Tags by clicking on its name in the list.
3. Expand the Filter you wish to edit and scroll to the **Contacts and Assets Condition**.
    - If you do not see a Contacts and Assets Condition, you can add one by clicking the **Add Condition** button at the bottom of the form.
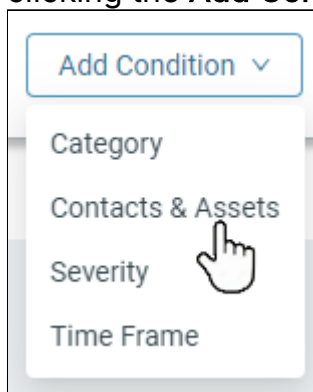
4. Use the Asset Tags control to select tags to use for asset filtering.
    - To match, assets must be of one of the selected Asset Types and have at least one of the selected Asset Tags. An asset need not have all the selected tags to match.
    - If you want your filter to match Assets with no tags, check "Select All," as that will match all configurations of tags, including no tags.
    - The Asset Tags filter control will always be present if you have a "**Tags**" attribute configured on any Asset Type in your Organization, regardless of which Asset Types are selected for inclusion in a given workflow filter. If you wish to ignore Asset Types in any workflow, simply check the "**Select All**" option in the Asset Tags control.
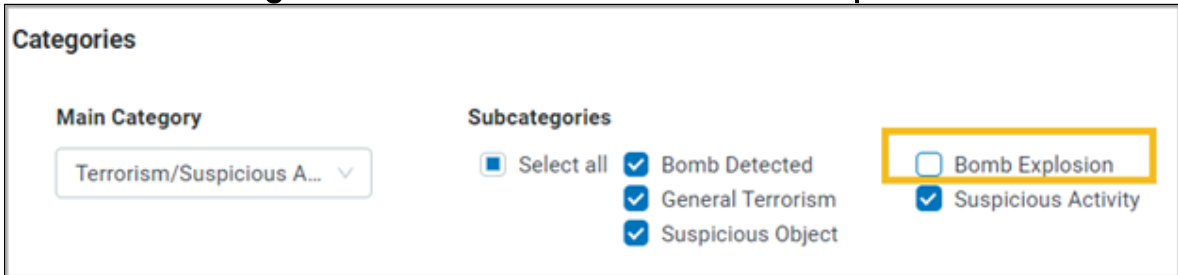5. Click **Save.**

Use Case: Apply "Always Alert" to One Risk Type

CEM Orchestration lets you take different actions for different types of Risk Events. In this example, we will apply the **Always Alert** setting to the Alert action for a single Risk Event subcategory. This means that alerts will be created for events in that subcategory, even if there are no Assets or Contacts nearby.
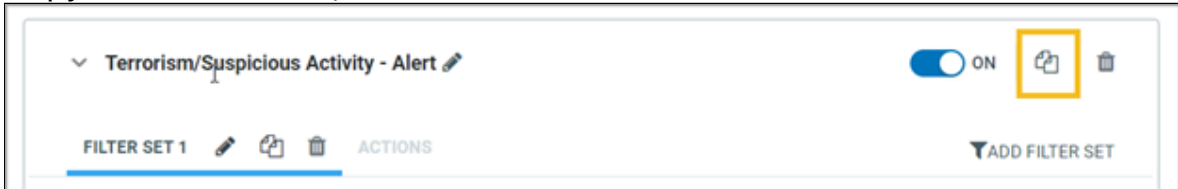
Because we want to take a different alert action, we will create a new rule in the workflow Terrorism/Suspicious Activity, and configure it to always alert only for events in the **Bomb Explosion** subcategory.

To create a new rule:
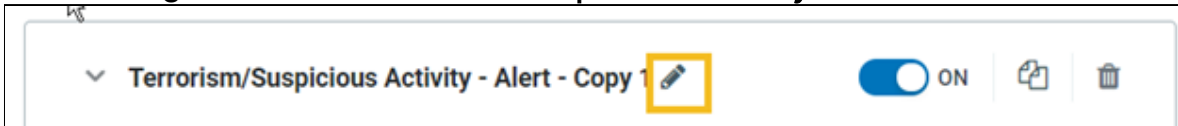
1. Select the workflow to change (e.g., Terrorism/Suspicious Activity). By default, the workflow will have one filter set that opens automatically. If additional filter sets exist, select the one you want to edit.
2. Scroll to the **Categories** condition and **deselect Bomb Explosion**.
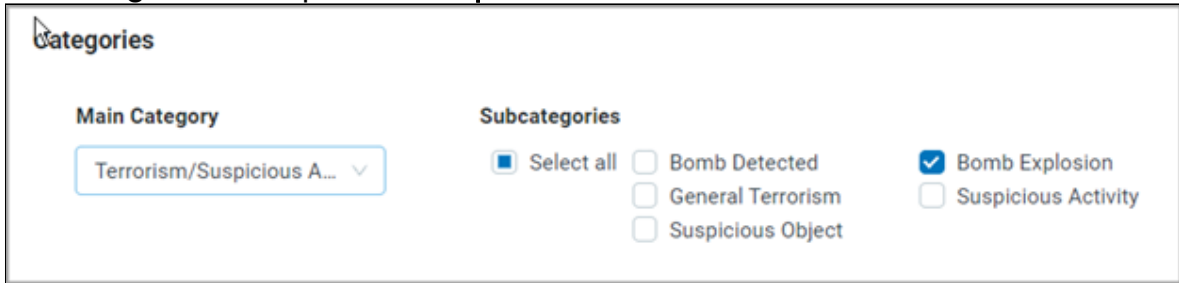

3. Scroll back up to the rule name and click the **Copy** icon. (Be sure to select the Copy icon for the rule, not the filter set.)

4. A new rule is created with a default name. Click the **Edit** icon next to the name and give it a name like **Bomb Explosion – Always Alert.**

5. With a filter selected, under the **Categories** condition, deselect all event subcategories except **Bomb Explosion**.
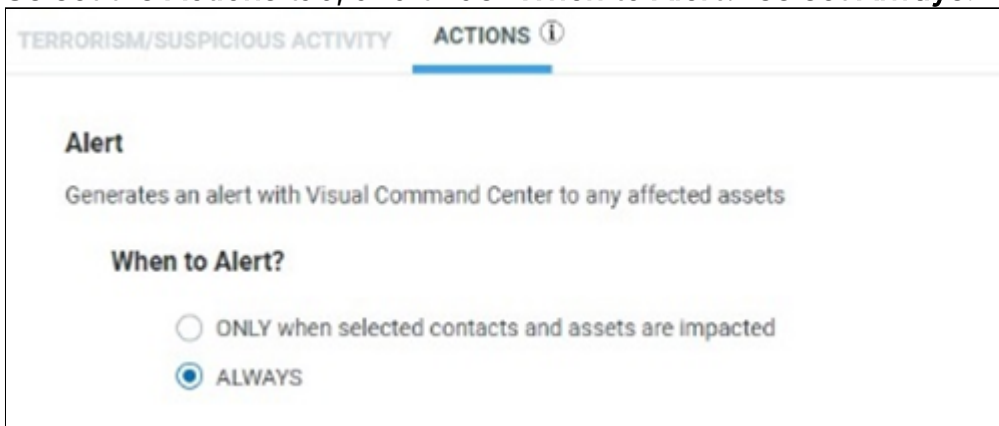

6. Select the **Actions** tab, and under **When to Alert?** select **Always**.
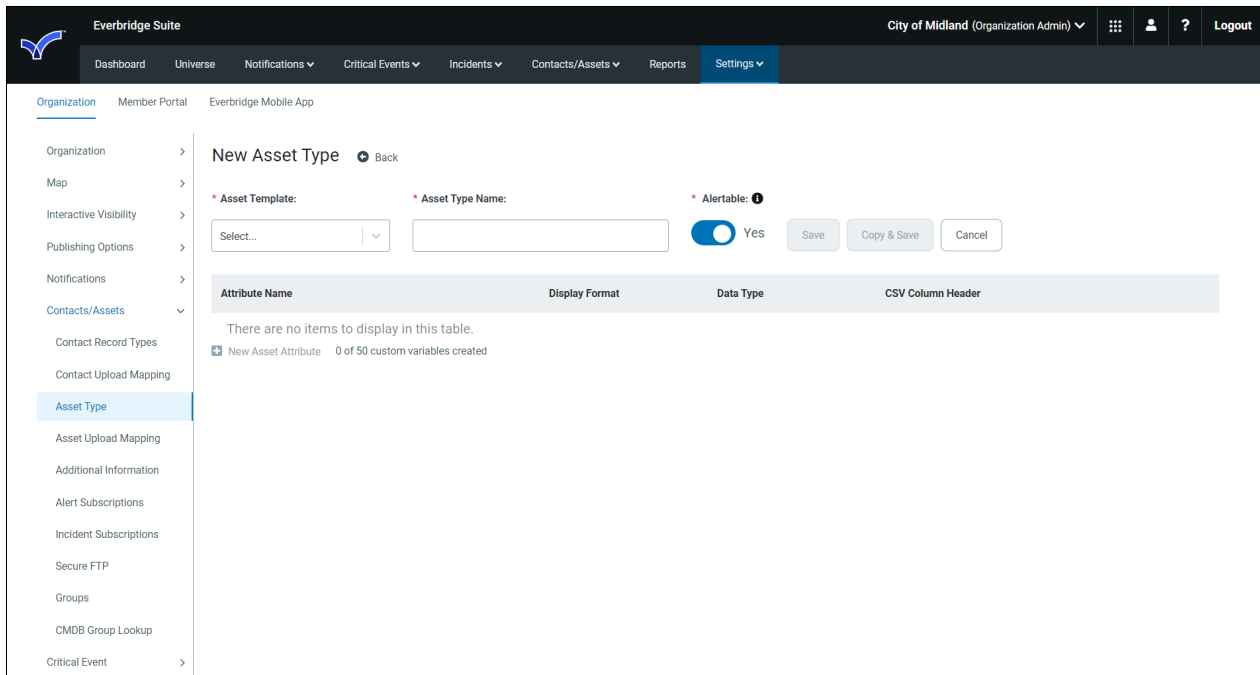

7. Click **Save**.

Use Case: Create Alerting Criteria by Asset Type

CEM Orchestration allows you to set up different alerting criteria for different **Asset Types**. For this example, we'll set up different alerting criteria for medical clinics that are located in urban areas and rural areas.

Aligning asset types and Workflows

Before you create workflows, you need to define your Asset Types to correspond with the way you want to alert about them. In this example, to have different alerting criteria for the clinics, you need to create separate Asset Types for the **Rural and Urban Clinics**, by following these steps:

1. Navigate to **Settings** > **Organization** > **Contacts/Assets** > **Asset Types**.
2. From the Asset Template menu, select **Facility**.
3. In the Asset Type Name field, enter **Urban Clinic**. Enable the **Alertable** setting for the new Type.
4. Click **Save**.
5. Repeat steps 3-5 to add the **Remote Clinic** Asset Type.
6. Add or upload your Clinic Assets to these two types.

Creating Alerting Thresholds for Different Asset Types

Once you have created Asset Types that will align with your alerting criteria, go to the **CEM Orchestration Workflows** page to create or edit a workflow. In this

example, we will edit the **Crime** workflow, creating different filter sets for **Urban and Rural Clinics**. For this example, we will use a sample Crime workflow with one rule that has one filter.

1. From the Workflows page, select the **Crime** workflow (or another workflow that you want to change).
2. Select the rule and filter you want to change. (For help, see Configure Rules and Filters.)
3. Click the **Copy** icon to duplicate the existing filter. A new filter is created with the default name **Filter Set 1 – Copy 1**.
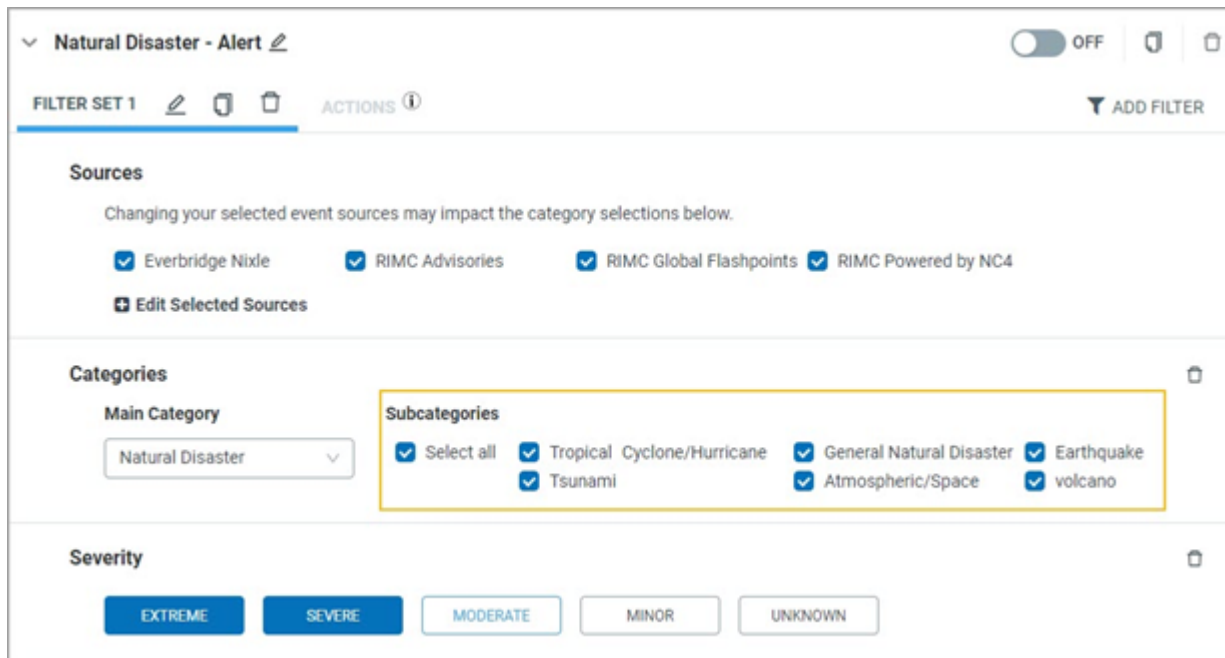

4. Select the new filter and click the **Edit** icon to change the filter name. Rename it **Urban Clinics**.
5. Scroll to **Impacted Assets** and deselect contacts and all asset types except **Urban Clinics**.
6. Under **Impacted Assets**, select **Urban Clinics**.
7. Adjust the **Impact Radius** and **Severity** to the values you want to apply to clinics in urban areas. To avoid over-alerting in population-dense areas, you may want to set a relatively small Impact Radius (e.g., 1 mile) and a high Severity.
8. Use the **Copy** button to create a copy of the filter.
9. Scroll to **Impacted Assets** and deselect contacts and all asset types except Rural Clinics.
10. Adjust the **Impact Radius** and **Severity** to the values you want to apply to clinics in rural areas.
11. Open the original filter; under Impacted Assets, deselect **Urban Clinics** and **Rural Clinics**, since you have now created separate filters for those Assets.
12. Save.

Use Case: Create Alerting Criteria for Contacts

CEM Orchestration enables you to configure alerting for Contacts of different **Types** and **Groups** when impacted by a Risk Event in their static home or office location, their last known location, or their expected location when traveling. This lets you have different alerting thresholds or launch different Incident templates that target different groups of Contacts.

In this example, we will configure different alerting criteria for a particular group of Contacts. We have a workflow that is configured to generate alerts for tsunamis of **Severe** or **Extreme Severity** near any of our Contacts, but because we are especially concerned about tsunamis affecting our employees in Japan, we want to alert on tsunamis of all Severities near these employees.

To do this, we need to create a separate filter set in the **Natural Disaster** workflow. We have also assigned all of our Contacts located in Japan to a contact group named **Japan Contacts.**

1. From the **Workflows** page, select the **Natural Disaster** workflow.
2. Select the existing **rule** and the **filter.**
3. Note that the subcategory **Tsunami** is selected, and under **Severity**, the **Extreme** and **Severe** options are selected.

4. Click the **Copy** icon to duplicate the existing filter. A new filter is created in this rule with the default name **Filter Set 1 – Copy 1.**

FILTER SET 1

5. Select the new filter and click the **Edit** icon to change the filter name. Rename it **Japan Tsunami.**
6. Under **Subcategories**, select only **Tsunami.**
7. Change the **Severity** values to only select **Moderate, Minor**, and **Unknown.**
8. Scroll to **Contacts** and **Assets** and deselect Assets.
9. Under **Contact Groups**, deselect all options except the group **Japan Contacts.**

10. Save**.**

Use Case: Set Up Automated Incident Notifications

CEM Orchestration allows you to set up **automated Incident Notifications** for events that impact your Assets and Contacts. You can do this based on an Asset Type, or on a Contact's static, last known, expected, or travel location. This lets you notify Contacts who may be affected by an event, and teams who are responsible for the Contacts' safety.

In this example, we'll configure Orchestration to automatically notify an executive safety team when a potential terrorist event occurs at a location where an executive has used the mobile app to check in.

To create an **automated Incident Notification**:

1. Click **New Workflow**. The Create New Workflow dialog appears.
2. Type a name for the workflow in the **Workflow Name** field. For example, Executive Protection.
3. Under the **Actions** heading, select **Include Incident** and click **Create**.
4. In the filter, under **Sources** and **Category**, select the Risk Sources and Risk Events that you want to create alerts for.
5. In the **Add Condition** menu at the bottom of the page, select **Severity**.
6. Select the **Severe** and **Extreme** options.
7. Under the **Contacts and Assets** heading, select the **Contacts** checkbox.
8. Under the **Impacted Contacts** section, select the checkboxes to specify the Contact Groups, Contact Types, and location options for the alert. For example, select the Executive Team Contact Group, Executive Contact Type, and Last Known Location options.
9. Select the **Impact Radius** to send an alert when a Contact is within a certain number of kilometers of an event.
10. Click the **Action** tab and select the desired Incident template. For example, select the **Safety Communications** Incident Type and then select the **Executive Safety Alert** Incident Template.
11. Optionally, select the checkboxes to determine how the Incident should function. For example, you could choose to automatically notify the impacted executives in addition to the executive safety team configured as recipients in the Incident template.

Use Case: Add Alerting Rules for a Self-Service Risk Event Feed

To add alerting rules for a Self-Service Risk Event Feed:

1. Make sure your **Risk Event Feed** is set up correctly and that you can see the Risk Events from that feed in **Visual Command Center**.
2. Navigate to **Settings** > **Everbridge Open** > **CEM Orchestration**.
3. Click **Workflows**. The Workflows page will appear.

Considering the Risk data that you expect from this Self-Service Risk Feed, review the workflows available in your Organization.

Add the Self-Service Feed to Existing Workflows

If you expect that Risk Events from the Self-Service Feed will fall under the categories covered by existing workflows, follow these steps to manage alerts for this feed in these existing workflows:

1. Open each workflow you'd like to add this new feed to.
2. Under the **Sources** section, click **Add Additional Source**.
3. Select your new source from the list and click **OK**.
4. Click **Save**.

Create a Separate Workflow for the Self-Service Feed

To create a separate workflow to manage alerting for this feed:

1. Click **New Workflow** on the Workflow page.
2. Name your new workflow something that makes it easy for you and others to understand the type of risk it covers.
3. Consider the **Risk Category** and the **Source Name**.
4. Under Sources, click the Add Additional Source link and select your Self-Service data source from the list.
5. Select the affected **Contacts** or **Assets** to alert on.
6. Set the **Impact Radius**.
7. To set a threshold for another alert attribute, for example, Severity or Category, click **Add Condition** and select the attribute.
8. Select threshold values for any attributes you add.
9. Click **Save**.