Custom Roles Guide

Everbridge Suite

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Introduction

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.

Use Cases

Some common use cases for expanding privileges include:

- As an Administrator, I want to create an Incident Operator to have the ability to create an Incident template.
- As an Administrator, I want to create an Incident Operator to have the ability to manage Contacts.
- As an Administrator, I want Incident Operators to have access to Universe to draw shapes and see how many Contacts are impacted.
- As an Administrator, I want to create a Dispatcher to have the ability to access Incident Communication features.
- As an Administrator, I want to create a Dispatcher to have the ability to manage Contacts.
- As an Administrator, I want a Dispatcher to be authorized to view Notification templates created by Organization Administrator roles.
- As an Administrator, I want a Dispatcher to be authorized to view Contact and group information while not able to change them.
- As an Administrator, I want to have a Group Manager role that can access Incident Communication features.

Sometimes Administrators will be interested in creating a Custom Role to restrict access to specific areas, such as:

- Creating an Incident Administrator role with the Edit Contacts permission disabled.
- Creating a Dispatcher role without access to Universe.

Roles and Permissions Scope

Custom Roles can be created from any of the following Role Templates:

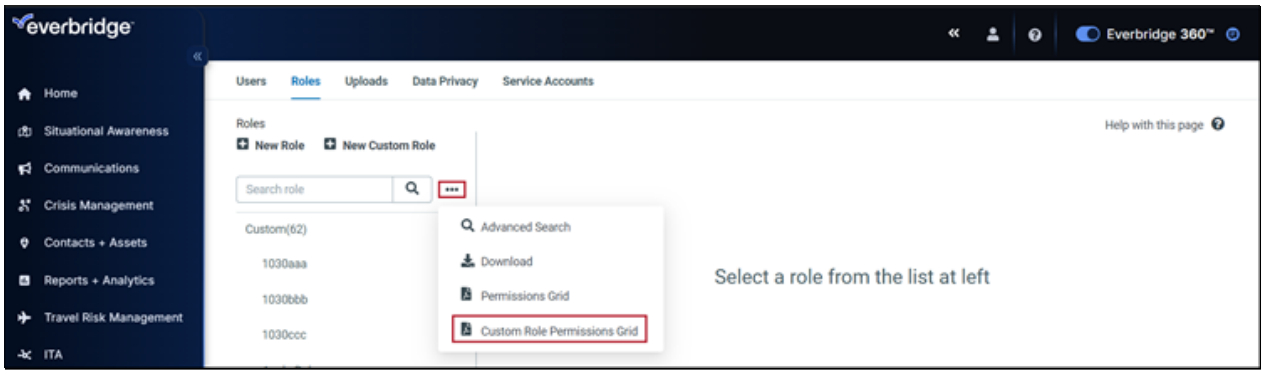
1. Incident Operator
2. Incident Administrator
3. Group Manager
4. Dispatcher
5. Data Manager
6. Communication Administrator
7. Communication Operator
8. Communication Training

Configurable Permissions Areas

Certain areas within Everbridge Suite have configurable permissions with Custom Roles. While more will be added over time, these currently include:

1. Universe
2. Visual Command Center
3. Notifications
4. Publish Options
5. Incidents
6. Contacts
7. Critical Events
8. Organization Settings
9. Reports
10. Advanced Reporting
11. Travel Risk Management
12. Asset Management
13. Communications

For a full list of configurable Custom Role permissions, see the Custom Roles Permissions Grid on the **Roles** page in the Manager Portal. The legacy Permissions Grid is available for download from here, as well.


everbridge
Everbridge 360™
Home
Situational Awareness
Communications
Crisis Management
Contacts + Assets
Reports + Analytics
Travel Risk Management
ITA
Users
Roles
Uploads
Data Privacy
Service Accounts
Roles
New Role
New Custom Role
Help with this page
Search role
Custom(62)
1030aaa
1030bbb
1030ccc
Advanced Search
Download
Permissions Grid
Custom Role Permissions Grid
Select a role from the list at left

Not Within Custom Roles Scope

While Custom Roles are widely usable across Everbridge Suite, note that some products or functionality aren't yet included.

Products or Features

The below feature sections may not work properly for Custom Roles until later iterations:

- Smart Orchestration

Functionality

The following functionality isn't included within the scope of Custom Roles:

- The Custom Roles feature doesn't add any new permissions.
- It will not add the ability for Group Managers to Upload Contacts. Any resource allocation of contacts will disable the Upload Contact feature for all role templates.
- It will not allow Account Administrators to manage cross-Organization Contacts, Notifications, or Incidents.
- It will not limit access to Contact Record data fields.
- A role cannot manage Incidents launched by another role regardless of IC Template access (unless the role is given access to all Communication resources).

Custom Role Usage Overview

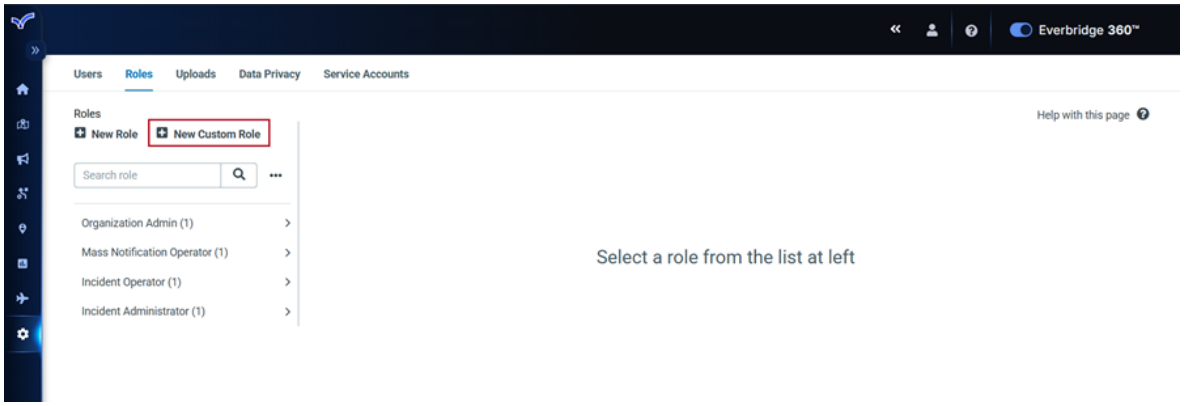
Creating a Custom Role

Custom Roles can be viewed, created, and edited from the **Roles** page.

> **NOTE:** See Validation Rules for more details about the validation process that occurs while creating a Custom Role.

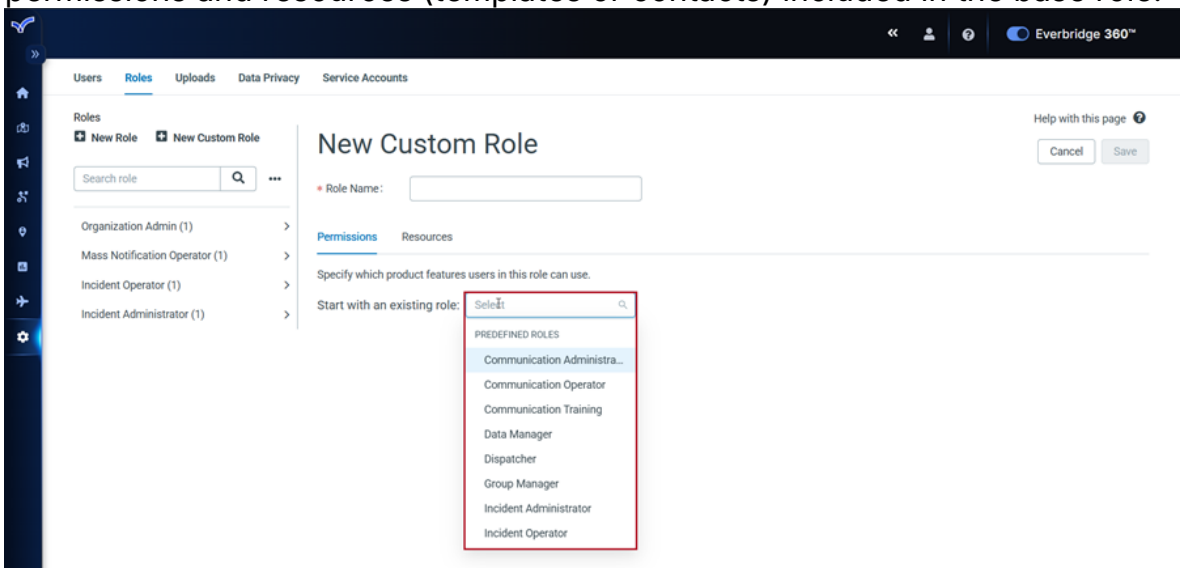
To add a Custom Role:

1. Click **New Custom Role**.

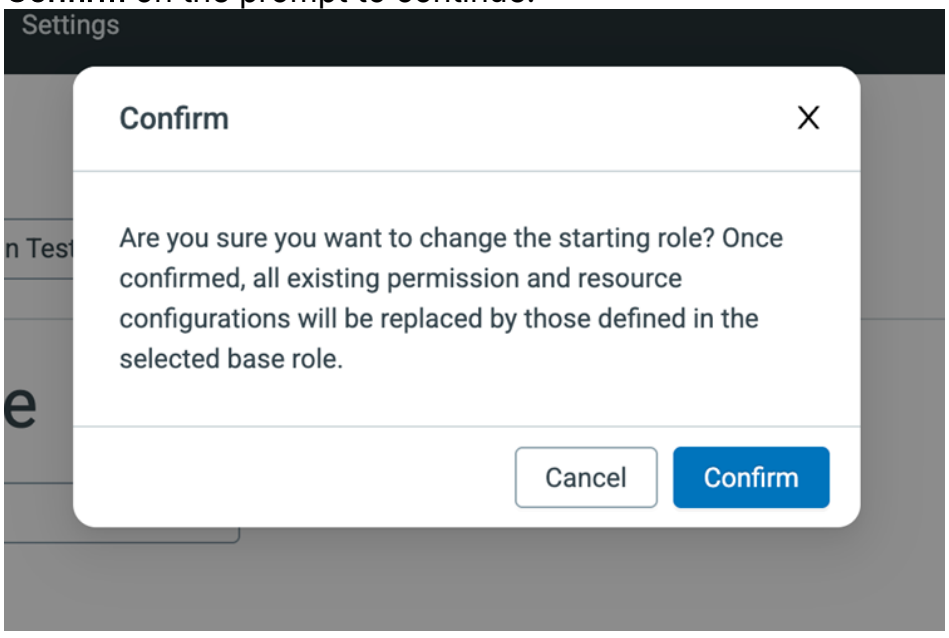


2. The **New Custom Role** page appears, where this new Custom Role can be given a name.
3. Under the **Permissions** tab, select a predefined role template to use as a starting point for the customization. The Custom Role will inherit any

permissions and resources (templates or contacts) included in the base role.

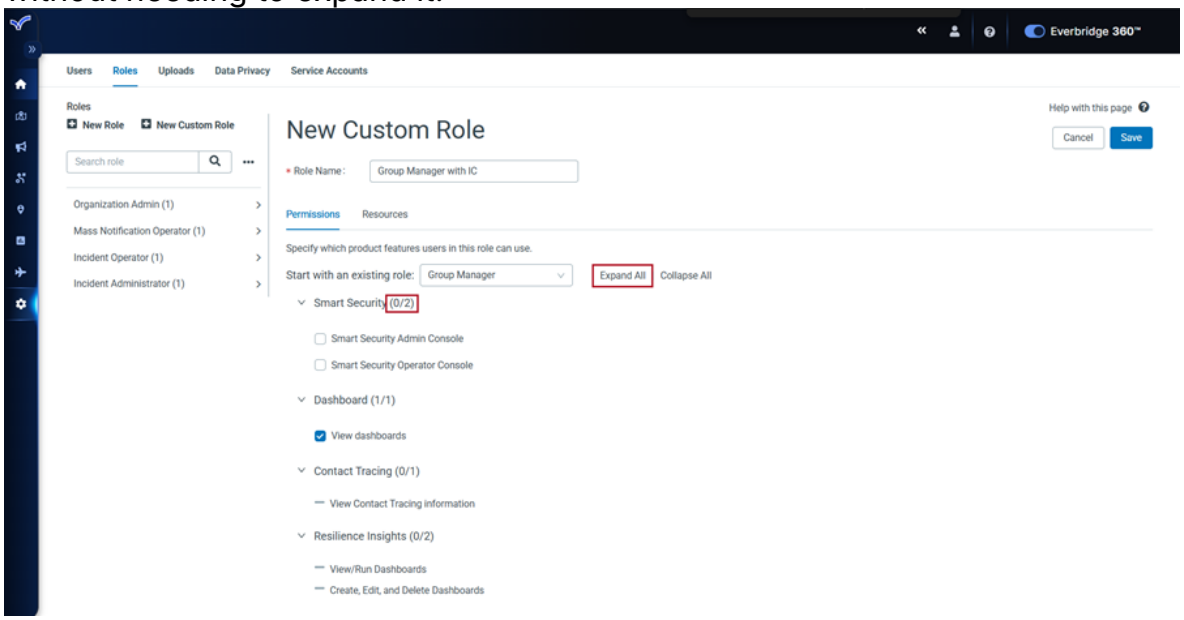


- **NOTE**: If a Custom Role is later edited to change the base role, a message will appear stating that the inherited permissions and resources will also be updated to reflect the new selection. Click **Confirm** on the prompt to continue.



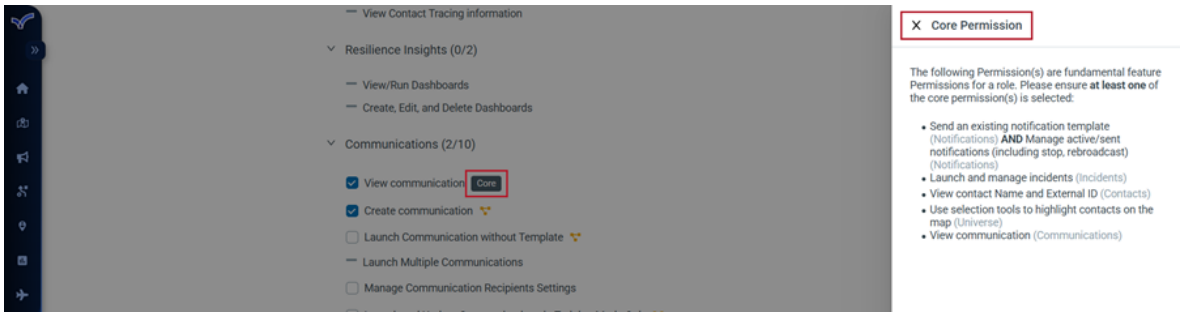
4. Use the **Expand All** option to quickly see which permissions for each feature are configurable for the selected Role Template. The number of included permissions for each section is indicated next to its name for quick reference

without needing to expand it.



5. Some permissions are dependent upon other permissions, which are denoted with the orange **Dependency** icon. Clicking this icon opens a side panel that provides a **Permission Dependency** tree for the selected permission, allowing the User to see exactly which permissions have a related dependency.

6. Permissions featuring the **Core Permission** icon are one of the five fundamental permissions (or permission combinations), and you must enable at least one of them. Clicking the icon opens a side panel with more details about the Core Permissions.

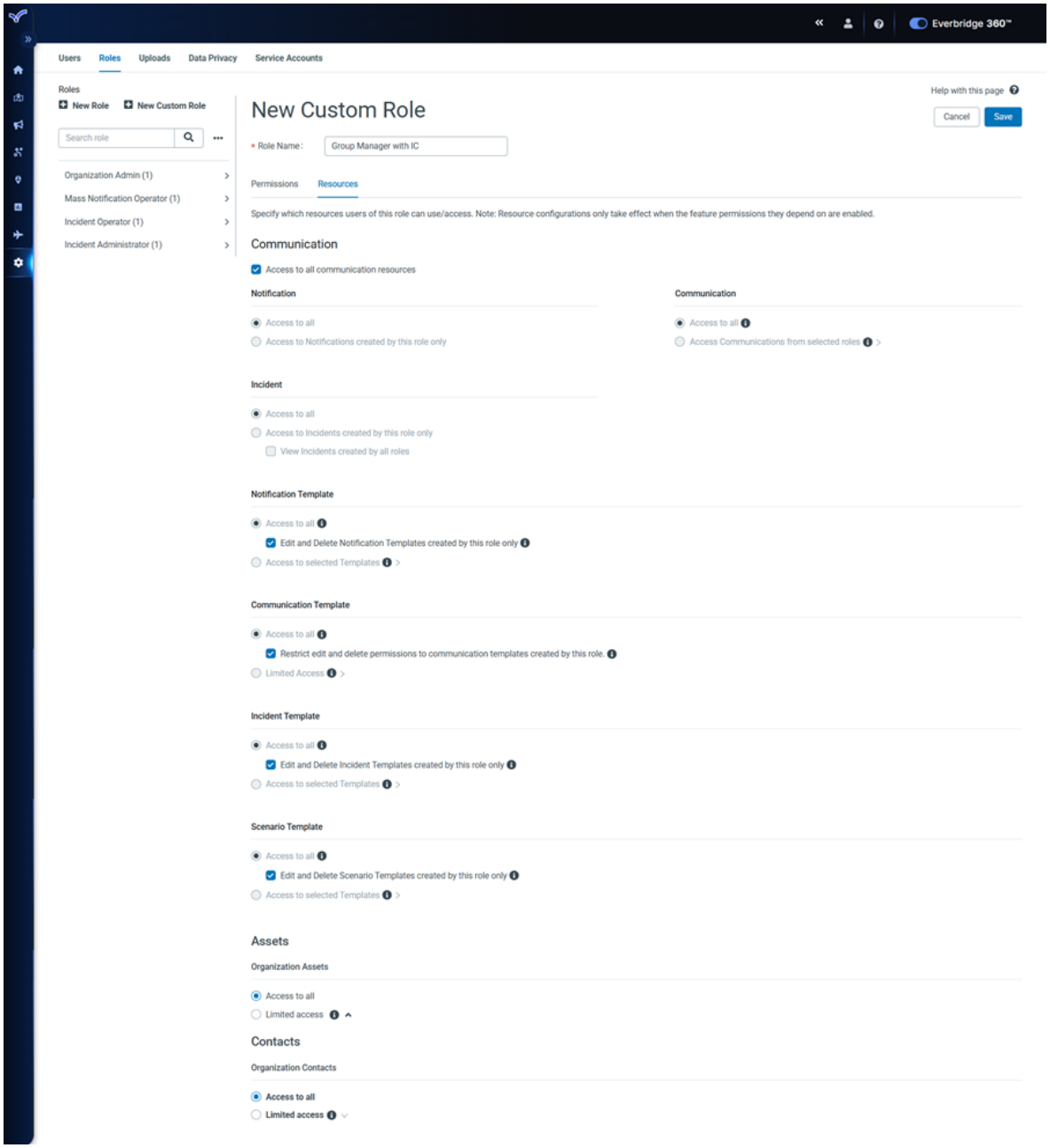


The five Core Permissions are:

- Send an existing Notification template (Notifications) AND Manage active/sent Notifications (including stop, rebroadcast) (Notifications)
- Launch and manage Incidents (Incidents)

- View Contact Name and External ID (Contacts)
- Use selection tools to highlight Contacts on the map (Universe)
- View communication (Communications)

7. Once the desired permissions have been selected, click the **Resources** tab to specify which resources can be accessed or used by this new role. Note that resources can be configured independently from features they depend on but will only take effect when the feature permissions they depend on are enabled.

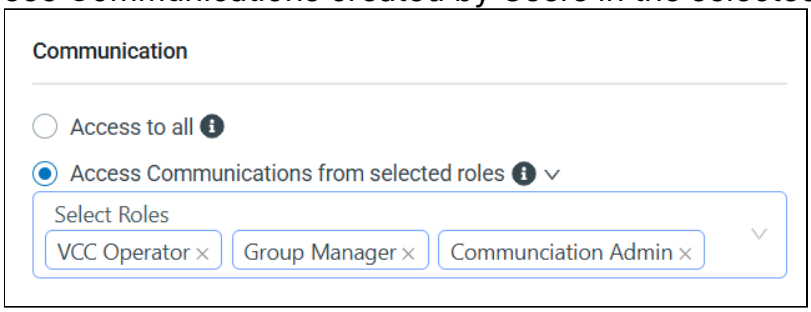


Resources are categorized into four types:

- **Communication**
  - Notification

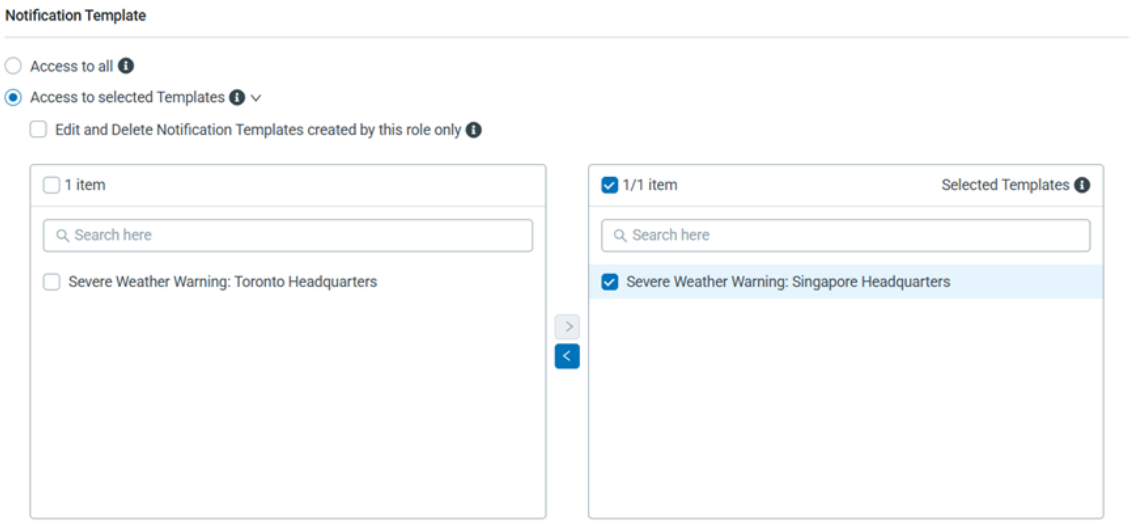
    - Communication
    - Incident
    - Notification Template
    - Communication Template
    - Incident Template
    - Scenario Template
- **Calendars**
    - Organization Calendars
- **Assets**
    - Organization Assets
- **Contacts**
    - Organization Contacts

8. In the **Communication** section, choose the level of access the Role should have to existing Communications:
    - Select **Access to all** to allow the Role to view all Communications.
    - Select **Access communications from selected roles**, then choose one or more Roles to limit visible Communications.
        - When this option is selected, Users assigned to the Role will only see Communications created by Users in the selected Roles.

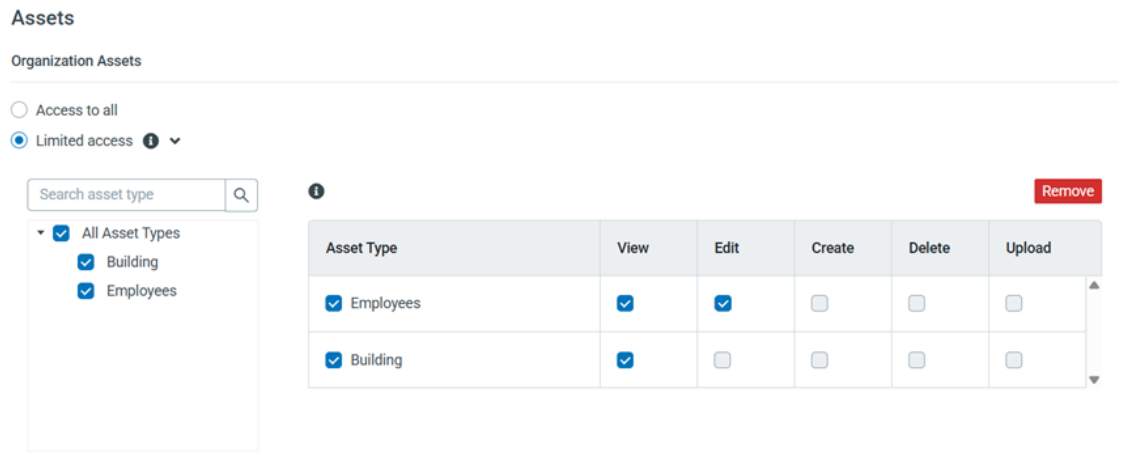


9. If the new Custom Role is only intended to have access to certain resources, such as specific Notification or Incident templates, you can define this by selecting **Access to Selected Templates** and choosing the desired templates. Note that the resources inherited from the chosen base role will already be

selected.

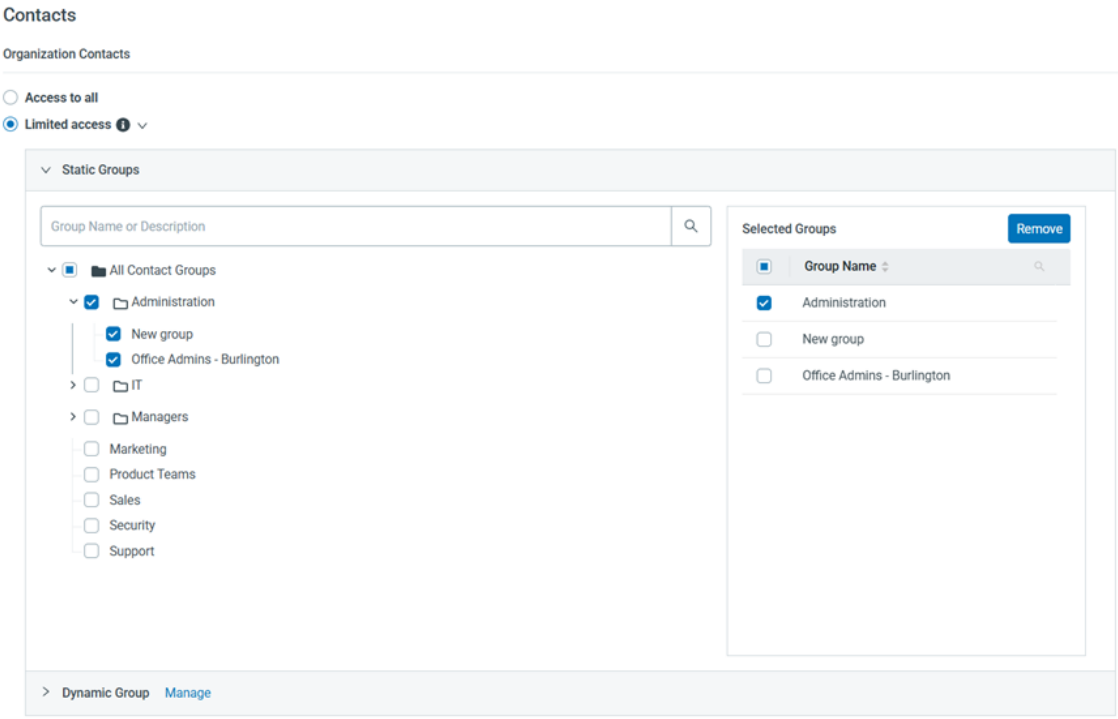


10. If the new Custom Role should only have access to Assets of a specific Type, that can be configured in the **Assets** section. Define if the role can only view these Asset Types, or if they can also edit, create, delete, or upload them, as well.

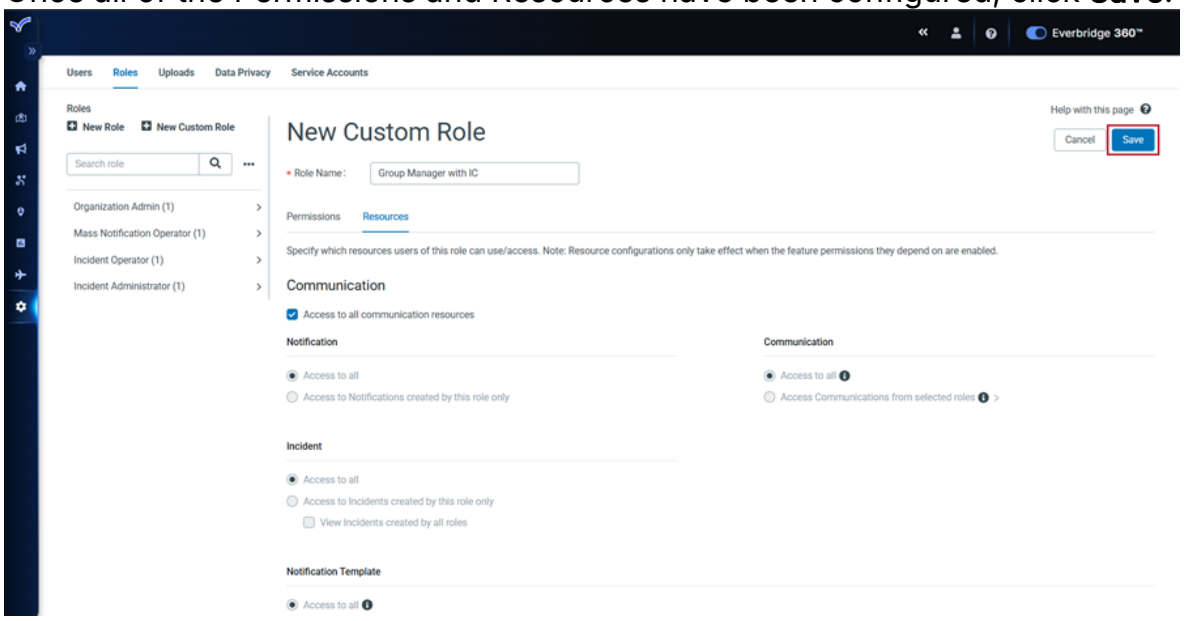


   - NOTE: These rules are honored across both the Manager Portal and Visual Command Center interfaces.

11. Next is the **Contacts** section, where the creator can specify both the Static and Dynamic Groups to which this new Custom Role will have access.

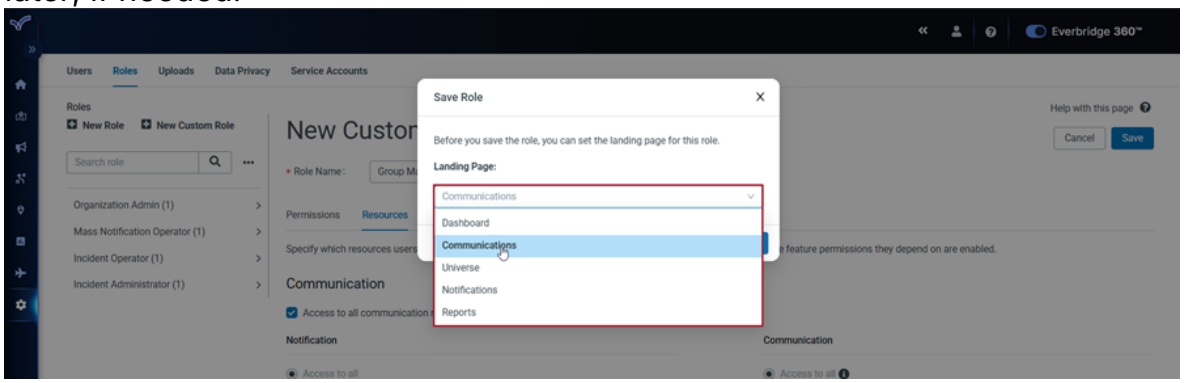


12. Once all of the Permissions and Resources have been configured, click **Save**.

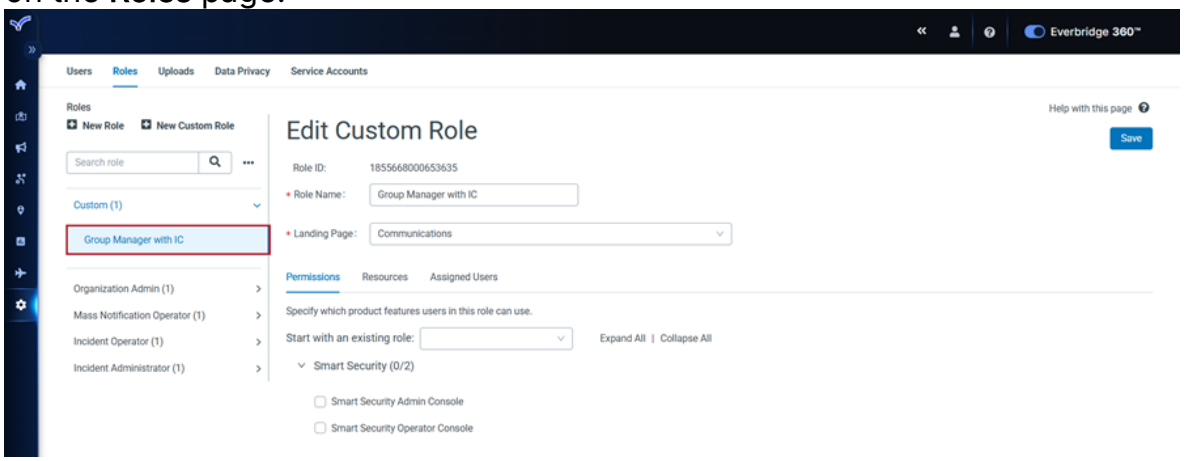


13. Choose which page that Users with this Custom Role should land on by default when signing in to the Manager Portal. Note that this can be edited

later, if needed.



14. The new Custom Role can now be seen and edited from the **Custom** section on the **Roles** page.



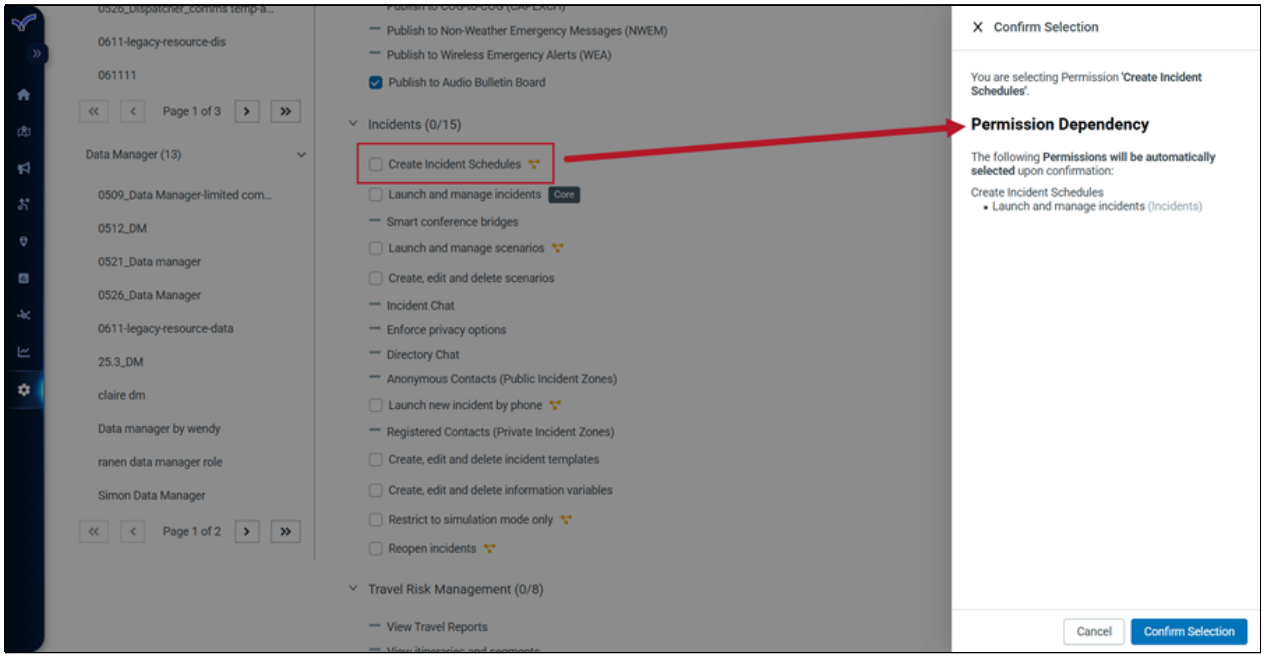
NOTE: The **New Role** button on the Roles page still functions as it did before the introduction of Custom Roles.

Validation Rules

Everbridge runs a combination of validation rules while Creating a Custom Role.

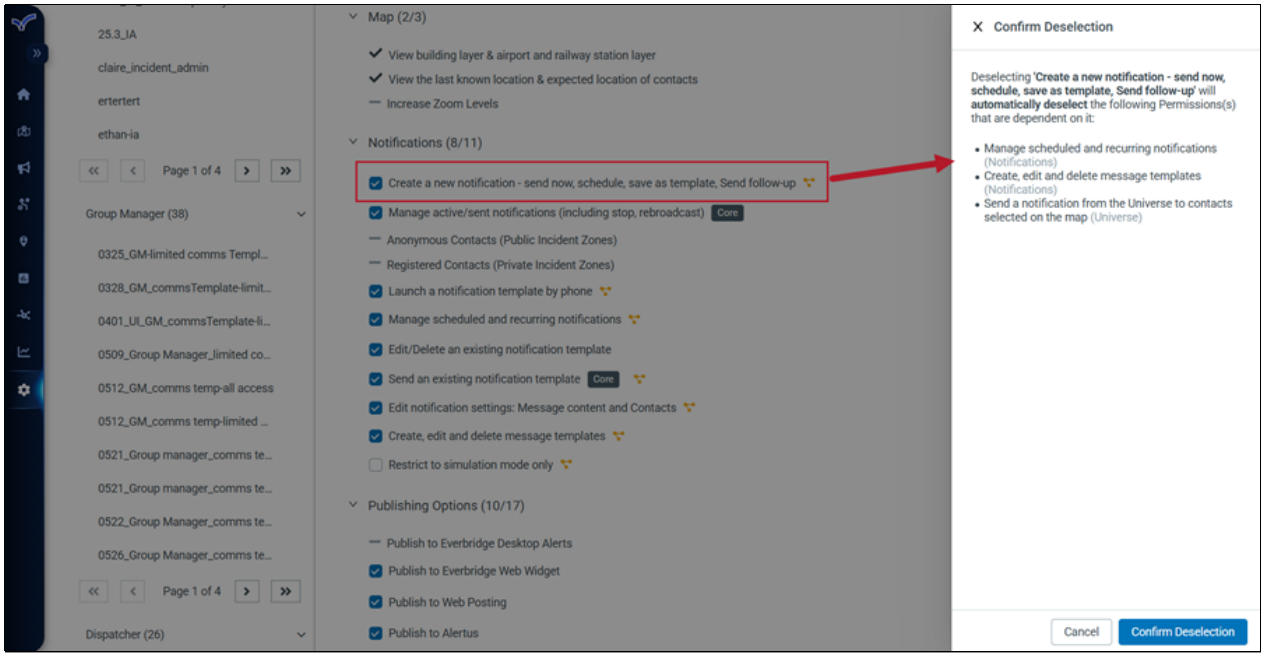
Permission Dependency (Checking)

When checking a permission with dependencies, Everbridge validates if its dependent permissions are all enabled. If not, a slide-out panel with required permissions opens the user to confirm auto-selection.



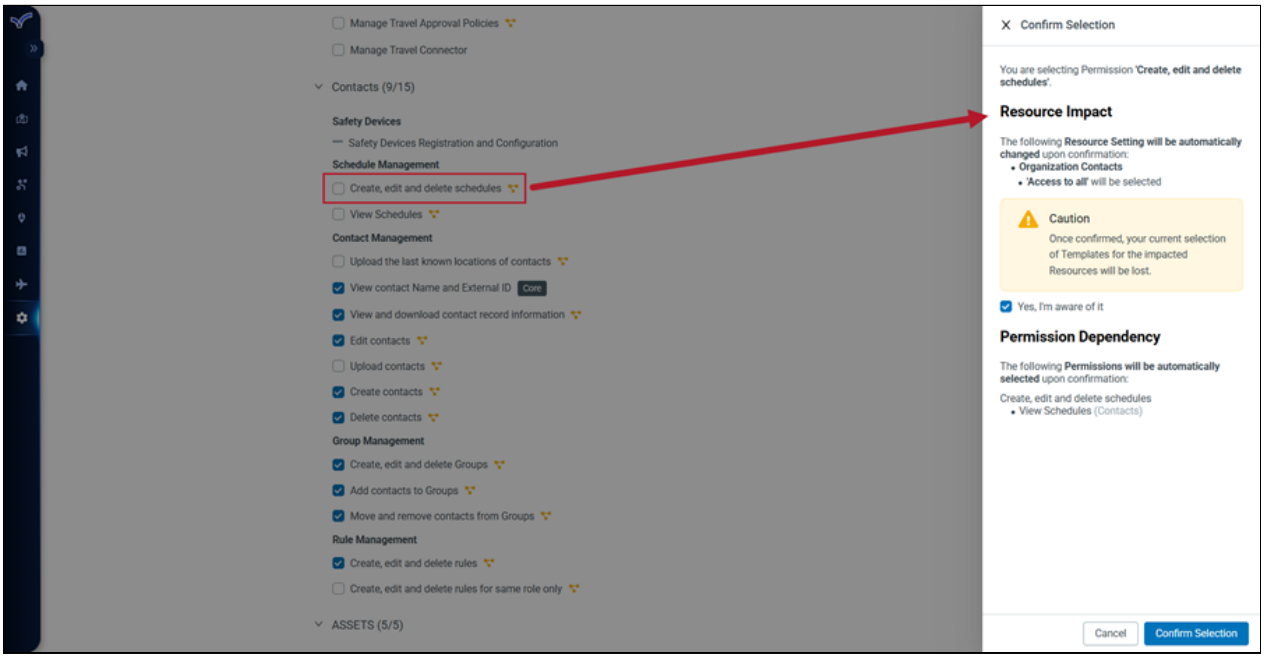
Permission Dependency (Unchecking)

When unchecking a permission that has a dependency on it, the system validates if permissions dependent on it are all disabled. If not, a slide-out panel with impacted permissions appears for the user to confirm auto-deselection.



Resource Impact

When checking a permission with resource impact, we validate if the required resource is configured as expected. If not, a slide-out panel with the impacted resource opens for the user to confirm the auto-change.



Core Permission

When unchecking one of the five Core Permissions, we validate if this is the only Core Permission (or permission combination) remaining on the role. If so, the user will be prevented from deselecting it and presented with a slide-out panel with Core Permissions information for troubleshooting.

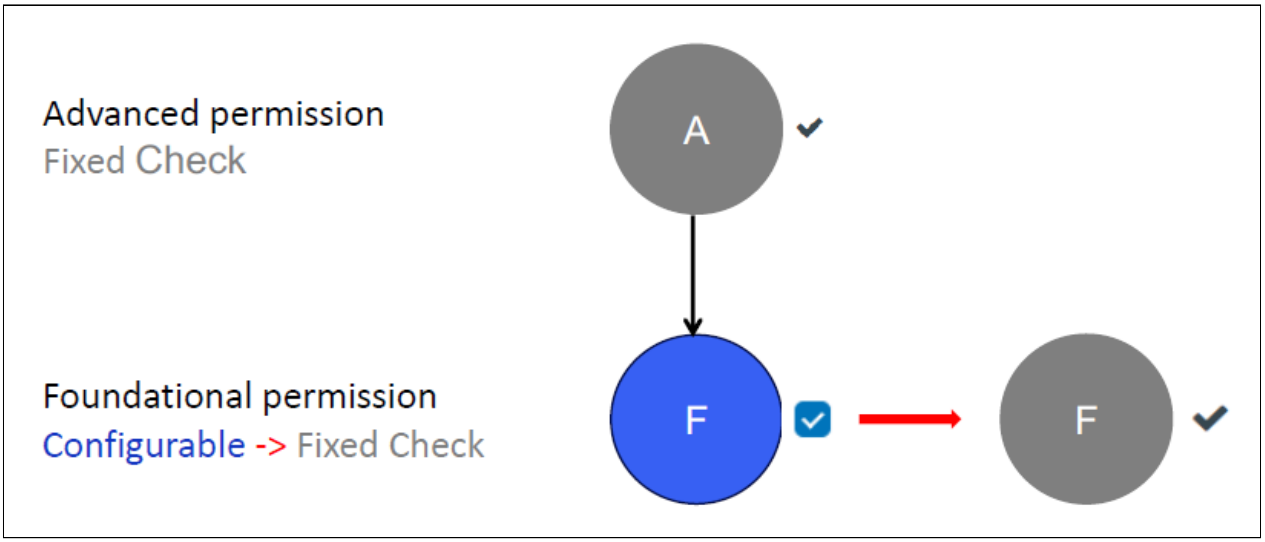
Custom Role Considerations

Interim Behavior - Configurable to Fixed Check

Advanced permissions that are enabled but not configurable and have a dependency on foundational permissions will prevent the foundational permissions from being configurable.

Example

The Create, edit, and delete Ingestions permission depends on Create, edit, and delete Incident templates. and Create, edit, and delete Ingestions is a fixed-check permission for the Incident Administrator role. Therefore, Create, edit, and delete Incident templates won't be configurable if the user starts from an Incident Administrator role template.



Support Resources

The following Custom Roles resources are available for download in the Support Center:

- Custom Roles FAQ
- Custom Roles Known Issues and Exceptions