



Everbridge SecureBridge User Guide



Everbridge Secure Messaging

May 25, 2016



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Printed in the USA.

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P R E F A C E

About This Guide

The following topics are covered:

- ◇ *Introduction*
- ◇ *Using Everbridge Secure Messaging Documentation*



Introduction

The *SecureBridge User Guide* provides application installation instructions, configuration and use, and troubleshooting information. The SecureBridge app is for use on Apple iOS and Google Android devices, as well as Web Client on Chrome and Internet Explorer 11.

The following sections provide information on how to use this guide, and outline any related Everbridge Secure Messaging publications.

Intended Audience

This guide is intended primarily for administrators and users who can confidently use this application.



Using Everbridge Secure Messaging Documentation

This section:

- ◇ Outlines the structure and contents of this guide
- ◇ Provides a list of conventions used in the Everbridge Secure Messaging documentation set

Contents of This Guide

This guide contains the following chapters and appendixes.

Chapter or Appendix	Description
<i>Chapter 1, Introduction</i>	Introduces you to SecureBridge application.
<i>Chapter 2, Installing SecureBridge and Signing In</i>	Provides provides information for you to install and sign in to your SecureBridge app.
<i>Chapter 3, Using SecureBridge</i>	Provides provides information to use your SecureBridge app.
<i>Chapter 4, Secure Messaging Notifications</i>	Provides information to set up Notifications in Secure Messaging and what happens in the Secure Messaging app.
<i>Chapter 5, Using the SecureBridge Web Client</i>	Provides information about using Secure Messaging web client user interface.
<i>Chapter 6, Administrating Secure Messaging</i>	Provides information about managing your secure messaging functions by means of the Everbridge Suite interface.
<i>Chapter 6, Troubleshooting SecureBridge</i>	Addresses common challenges when installing or using SecureBridge.
<i>Appendix A, Organization Settings</i>	Describes the configuration options available to you in the Everbridge Suite system. The Organization tab is provided for Administrators to configure settings specific to your organization.

Conventions

The following table describes the typographical conventions used in this guide.

Convention	Meaning
Monospace	Indicates text that should be entered <i>exactly as shown</i> (including punctuation) or examples of code. Here is an example of a command line: <code># mkdir /somedir</code>
Bold	Indicates text that must be typed by the user. For example, From the Title field, type XXX and press TAB to advance to the next field.



Convention	Meaning
<i>Italic</i>	Indicates a cross-reference. For example, “See <i>Starting a Group Chat</i> on page 36”.
NOTE	A note emphasizes information that is of particular significance for the topic under discussion.

Introduction

This chapter introduces you to the SecureBridge application.

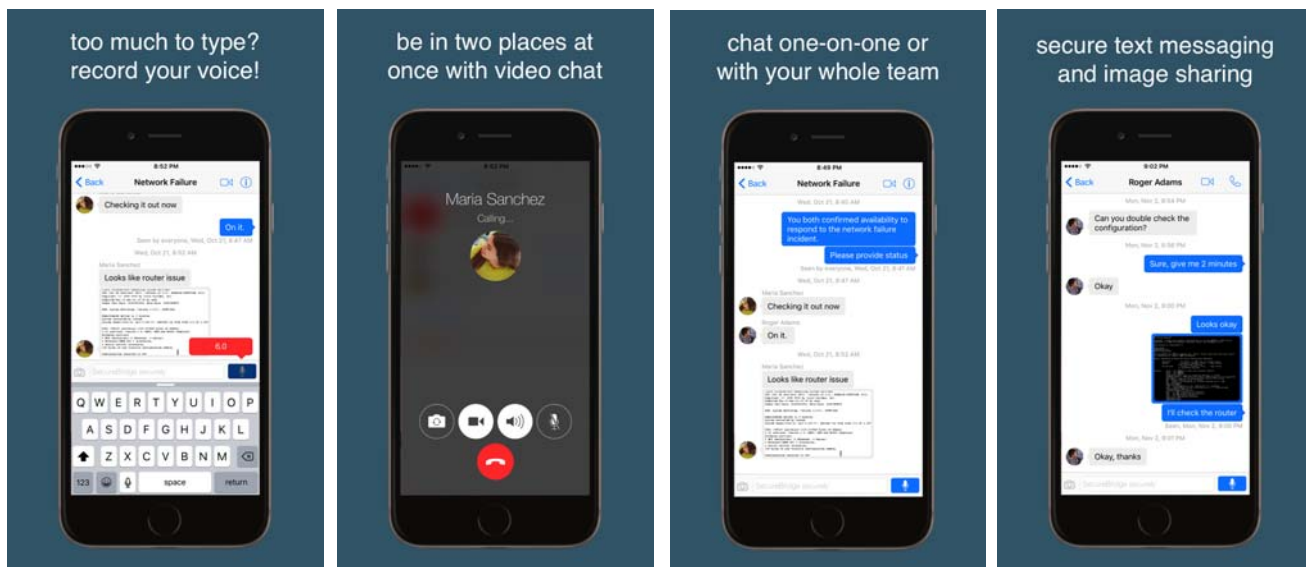
The following topics are covered:

- ◇ *Overview*
- ◇ *System Requirements*



Overview

SecureBridge is the easy-to-use secure messaging solution for today's communication. Every day, executives, customers, emergency responders, and workers across all industries use iMessage, FaceTime, and Skype to share important information. Unfortunately, they are not secure and can result in data breaches of confidential information. SecureBridge is a mobile application available for both iOS and Android platforms that allows for secure texting with one colleague or a group, voice messaging, image sharing, and video calling. It works just as easily as iMessage, FaceTime, and Skype, but ensures your communications are secure.





System Requirements

The following are the system requirements to use SecureBridge.

- ◇ iOS version is available through the Apple App Store:
 - Requires the use of a configured Apple ID
 - Requires iOS 8.0 (or later)
 - Compatible with iPhone, iPad, iPod Touch
 - Requires 62MB of available space on the device
 - Requires cellular data or a Wi-Fi connection for Internet access
- ◇ Android version is available through Google Play:
 - Requires the use of a configured Google Play account
 - Requires Android 4.1 (or later)
 - Requires 30MB of available space on the device
 - Requires cellular data or a Wi-Fi connection for Internet access
- ◇ Web Client:
 - The latest version of Chrome Browsers requires the OpenTok plug-in for video calling.
 - Internet Explorer 11 (IE11) requires the OpenTok plug-in for video calling, IE11 does not support audio recording.
 - Use of video and audio features require video and audio hardware on the computer.



Installing SecureBridge and Signing In

This chapter provides information for you to install and sign in to your SecureBridge app.

The following topics are covered:

- ◇ *Downloading and Installing with iOS Devices*
- ◇ *Registering With SecureBridge and Signing In*
- ◇ *Editing Your Profile and Settings*



Downloading and Installing with iOS Devices

The SecureBridge application is developed for your Apple iOS or Google Android device.

- ◇ For iOS, the SecureBridge app can be obtained through the Apple App Store, which is available through the App Store on your iOS device (a cellular data or Wi-Fi connection will be required) or through iTunes on your computer.
- ◇ For Android, the SecureBridge app can be obtained through Google Play, which is available through the Google Play icon on your Android device (a cellular data or Wi-Fi connection will be required) or through Google Play on your computer.

The examples in this chapter show using SecureBridge on an iPhone. Your screens might not look exactly like the examples, but the features are the same.

Depending on your method of installation, complete the actions in one of the following columns.

App Store from iOS Device

- 1 Select the App Store icon on your device.



iTunes from a Computer

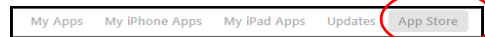
- 1 Open iTunes.



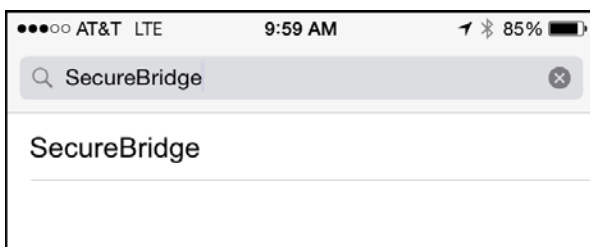
- 2 Use the Search function at the bottom of the App Store app.



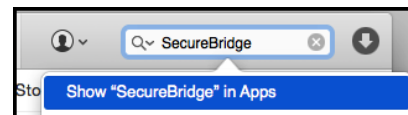
- 2 Select the App Store button.



- 3 Enter the search term **hipaachat** and then tap the SecureBridge Lite search result.



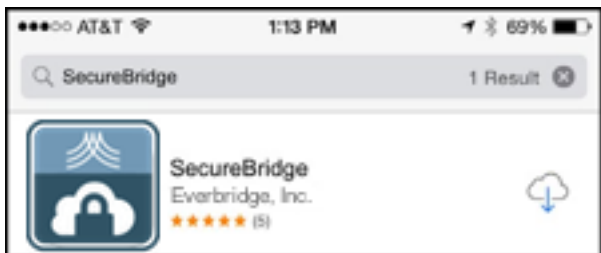
- 3 Use the search function at the top right of iTunes, enter the search term **SecureBridge**, and select the SecureBridge search result.





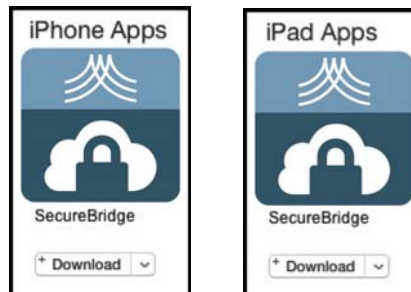
App Store from iOS Device

- 4 When prompted, tap the Get button for SecureBridge.



iTunes from a Computer

- 4 Select the version to install (iPad and/or iPhone) and click the Download button below the icon.



NOTE: You might see more than one version in the App Store, depending on the device(s) you own.

- 5 Once installed, a new icon for SecureBridge becomes available.



- 5 Once the app is downloaded into iTunes, connect your iOS device to your computer via sync cable (not provided by Everbridge) and sync your device. This completes the SecureBridge install on your device and a new icon becomes available.





Registering With SecureBridge and Signing In

Upon successful installation on your device, you can open the SecureBridge app on your device by selecting the associated app icon (shown below).



Once open, the SecureBridge app allows you to create a new account (if you are a new user) or to sign in with an existing account (if you have used SecureBridge before).

NOTE: If your organization is utilizing Everbridge's premium Active Directory/LDAP integration, you will use your existing username/password for your environment to login to SecureBridge. If you are unsure of what to do, contact your internal administrator.



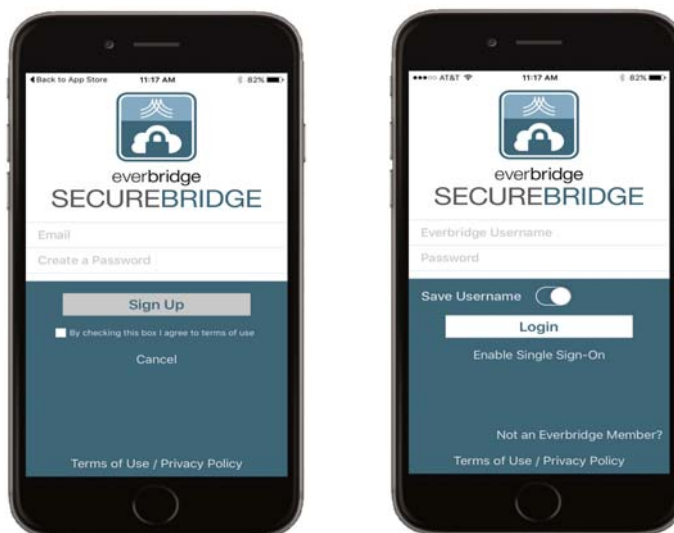


Overview of Signing In

There are three ways to sign in:

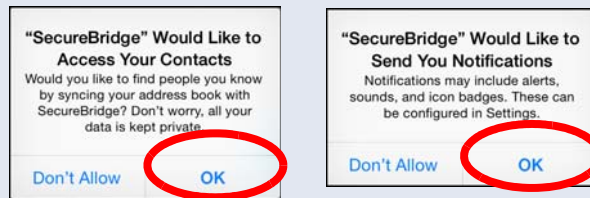
- ◇ As a **“Free User”**—You are not associated with an Everbridge organization. However, you can be invited to join one organization by the organization administrator. You become both a contact and a Secure Messaging user when you join.
- ◇ As an **Everbridge Member**—You are already a member of an Everbridge Member Portal. This means you were previously invited by an organization administrator to join the Member Portal. You signed up. Then, with those credentials (username and password), you are already a contact, and also become an Secure Messaging user after you sign in to SecureBridge.
- ◇ As an **Active Directory (AD) User**—AD allows you to use one set of credentials to sign in to many applications; otherwise known as “Single Sign-On” (SSO). There are two ways you can become an AD User in SecureBridge:
 - You are not a contact in the organization. You sign in as a Free User, and Everbridge Implementation enables Client SSO for your account. Once you sign in, you become a contact and Secure Messaging user with your “Free User” credentials.
 - You are already a contact in the organization. Your External ID is your email address. You sign in to SecureBridge with that email address. Tap Y (yes) confirming your Active Directory credentials. Enter the username and log in again. SecureBridge will look through your organization’s contact database for a contact record with an External ID that matches your email address. If found, your contact record and secure messaging user records will be linked for your organization.

When you are a Secure Messaging user, you are able to send notifications to SecureBridge.



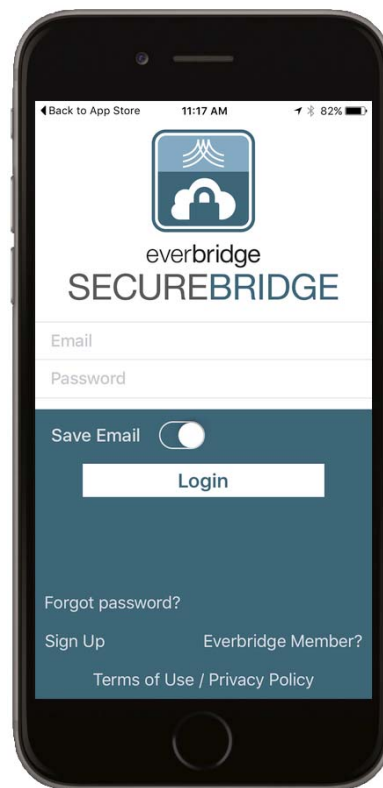


NOTE: After opening the app on your device, if this is the first time the app has been used, you may be prompted to:



It is recommended you tap OK when prompted. Doing so provides the most robust functionality when using SecureBridge. Your data is kept secure and confidential when using SecureBridge.

Depending on the type of user you are, after opening the app from your device, follow the procedure below to create your account and sign in.



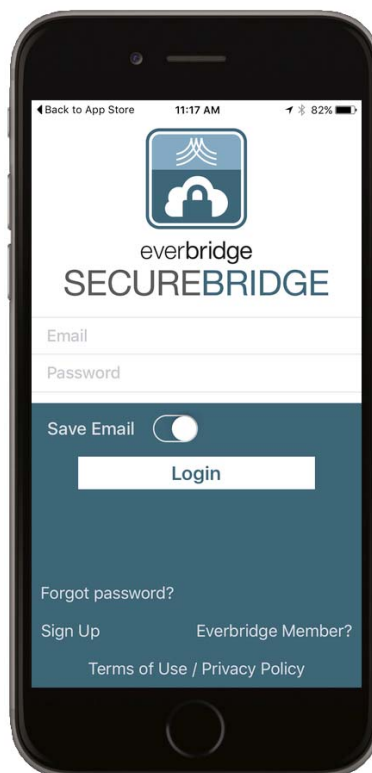
- ◇ *Signing in as a Free User* on page 11
- ◇ *Signing in as an Everbridge Member* on page 14
- ◇ *Signing in as an Active Directory User* on page 16



Signing in as a Free User

To sign up as a Free User

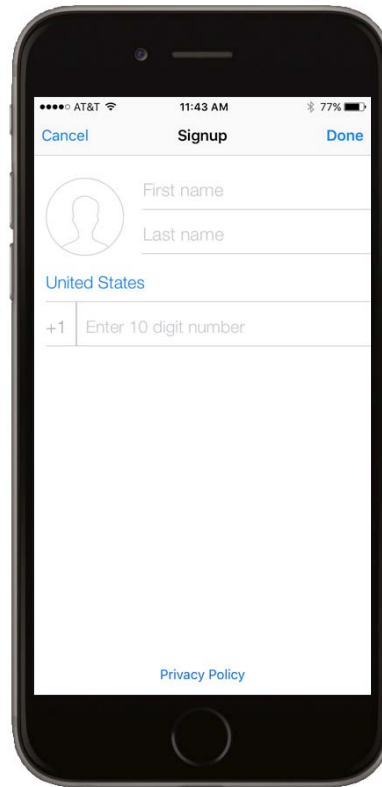
- 1 From the initial Login page, tap the Sign Up button in the lower left of the SecureBridge app.
The Sign Up page appears.



- 2 Enter your email address, which acts as your username or Login ID.
- 3 Enter a password.
- 4 Select the check box to accept the Terms of Use.
- 5 Tap Sign Up.



The Profile page appears.

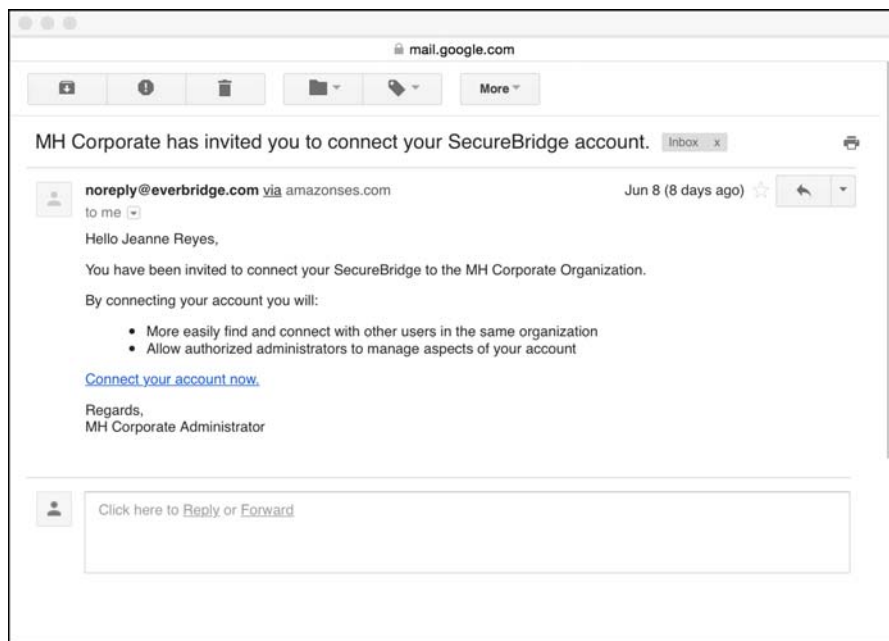


- 6 Enter the following fields on the Profile page:
 - Type your First Name.
 - Type your Last Name.
 - Add a photo (avatar) if desired.
 - Tap the Country: United States (default) if you need to change it to United Kingdom.
 - Enter your mobile phone number.
- 7 Notice the display-only field where your email address has been retained.
- 8 Tap Done in the upper right corner of the page.
When you logout, you are returned to the main login page. The next time you log in, you will go directly to your list of conversations.



To join an organization

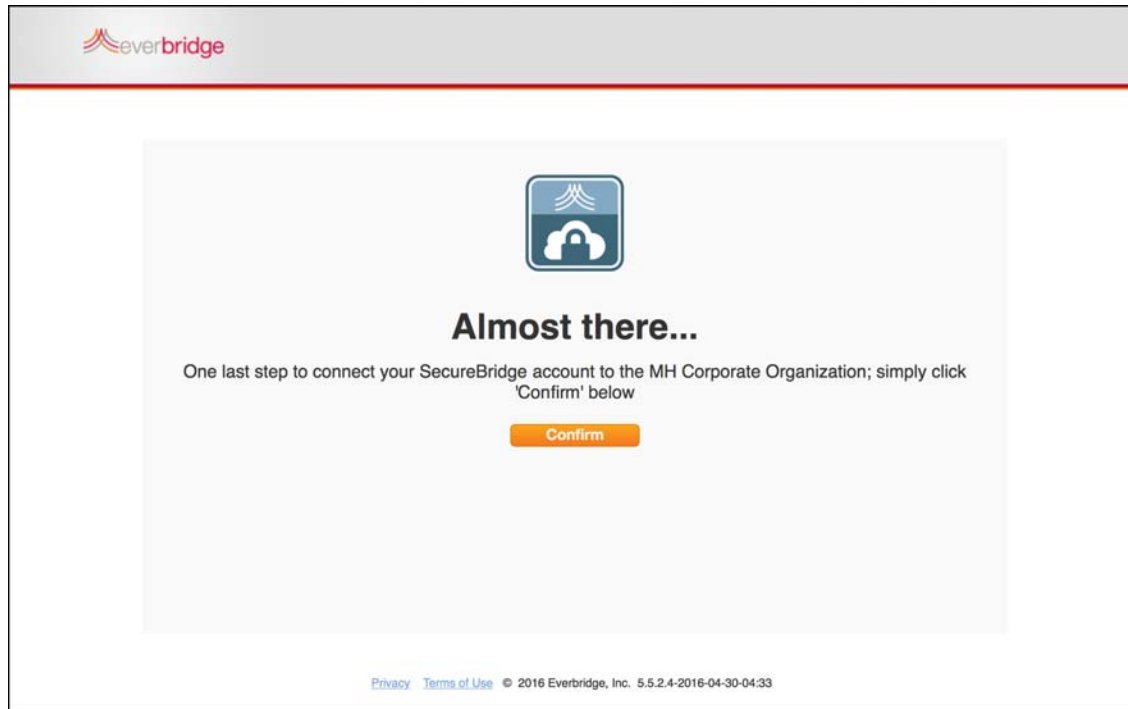
- 1 The organization administrator sends you an email invitation to join the organization, similar to the one below.



- 2 Tap the link: Connect your account now.



An “Almost There” dialog is displayed.



- 3 Click Confirm to connect your SecureBridge account to the organization.

Signing in as an Everbridge Member

If you are already a user of an organization’s Member Portal, sign in as an Everbridge Member.

To sign in as an Everbridge Member

- 1 From the initial Login page, tap the Everbridge Member? link in the lower right of the app.



The Login page for Everbridge Members is displayed.



- 2 Enter the username you created in your organization's Member Portal.
- 3 Enter the password you created in your organization's Member Portal.
- 4 Tap Login.
The Profile page is displayed.
- 5 Enter the following fields on the Profile page:
 - Add a photo (avatar) if desired.
 - Tap the Country: United States (default) if you need to change it to United Kingdom.
 - Enter your mobile phone number.
- 6 Notice your display-only email address and organization name.
- 7 Tap Done in the upper right corner of the page.
- 8 When you logout, you are returned to the Everbridge Member Login page.



Signing in as an Active Directory User

If your organization is using Everbridge's premium Active Directory/LDAP integration, you will use your existing username/password for your company to login to SecureBridge.

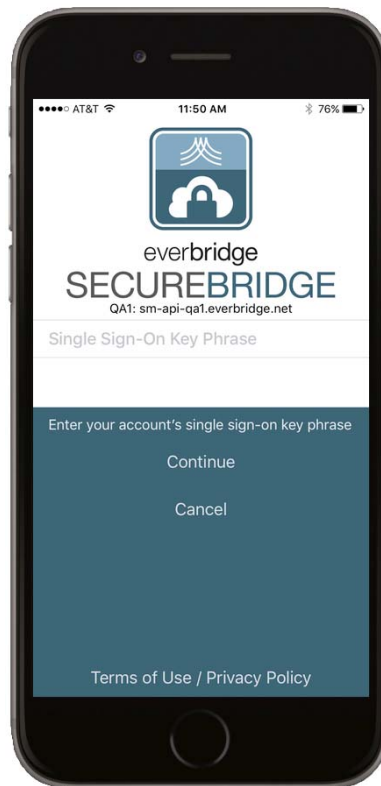
Perform one of the procedures:

- ◇ *To sign in as an Active Directory User but not yet a contact, next.*
- ◇ *To sign in as an Active Directory User with a contact record on page 19.*

If you are unsure of what to do, contact your internal administrator.

To sign in as an Active Directory User but not yet a contact

- 1 From the initial Login page, tap the Enable Single Sign-On link. The next page is displayed.



- 2 Enter your account's Single Sign-On Key Phrase and tap Continue.



The app navigates to the organization SSO sign-in page.

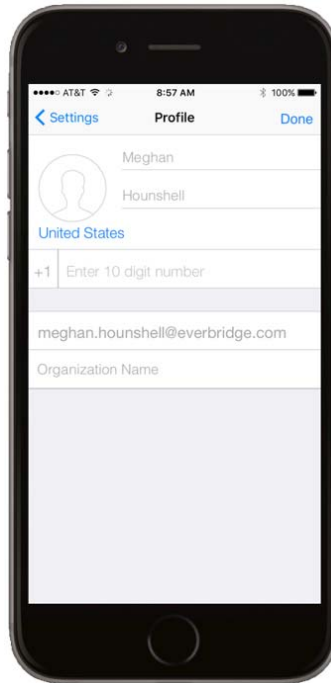


- 3 Enter your organization's domain.
- 4 Tap Login.
The "Auth0" organization sign-in page is displayed.





- 5 Enter your organization username and password, then tap Login. The Profile page is displayed.



- 6 Enter the following fields on the Profile page:
 - Add a photo (avatar) if desired.
 - Tap the Country: United States (default) if you need to change it to United Kingdom.
 - Enter your mobile phone number.
- 7 Notice your display-only email address and organization name.
- 8 Tap Done in the upper right corner of the page.
- 9 Go to *To sign in as an Active Directory User with a contact record*, next. When you logout, you are returned to the main login page. After logging in after the first time, the Conversations page is displayed.



To sign in as an Active Directory User with a contact record

- 1 From the initial Login page, tap the Enable Single Sign-On link. The next page is displayed.





Enter your account’s email address, and tap Login.



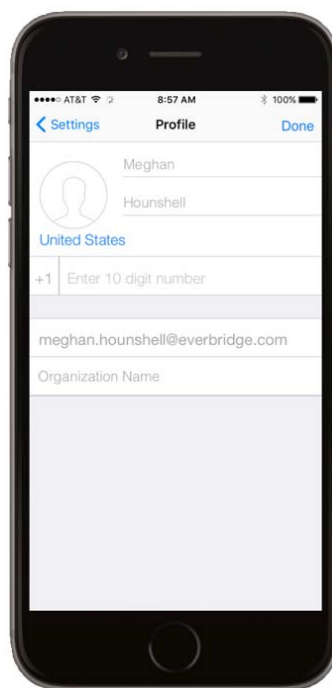
- 2 Tap OK to confirm you want to login to your company. The app navigates to the company sign-in page.



- 3 Enter your company credentials and tap Login.



The Profile page is displayed.

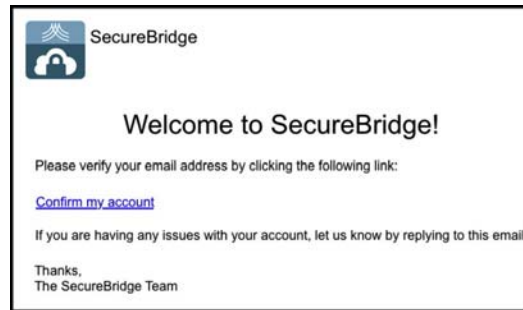


- 4 Enter the following fields on the Profile page:
 - Add a photo (avatar) if desired.
 - Tap the Country: United States (default) if you need to change it to United Kingdom.
 - Enter your mobile phone number.
- 5 Notice your display-only email address and organization name.
- 6 Tap Done in the upper right corner of the page.
- 7 Go to *To sign in as an Active Directory User with a contact record*, next.
When you logout, you are returned to the main login page. After logging in after the first time, the Conversations page is displayed.

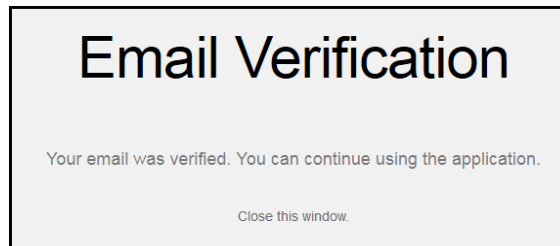


Confirming Your Account Information

After successfully configuring your account information in the previous steps, you will be able to securely communicate with others that are using SecureBridge. Additionally, you will also receive an email from SecureBridge to verify the email address you used when configuring your new account. This email is shown next.



Once you click the Confirm my Account link in the email (shown above), your web browser opens and your email address is verified. You can close your web browser after the verification page is displayed.



This completes the *Registration and Sign-Up* process for the SecureBridge app. See the chapter *Using HipaaBridge*, next, regarding use of the app on your device.



Editing Your Profile and Settings

The SecureBridge Profile page allows you to control the information that is displayed to other users, and allows you to configure security settings.

To access your Profile

- 1 From the Conversations page, tap the Gear icon. The Settings page is displayed.



- 2 Select My Profile.
- 3 Edit any of the following fields:
 - First Name
 - Last Name
 - Photo (Avatar)



To use your Away Message

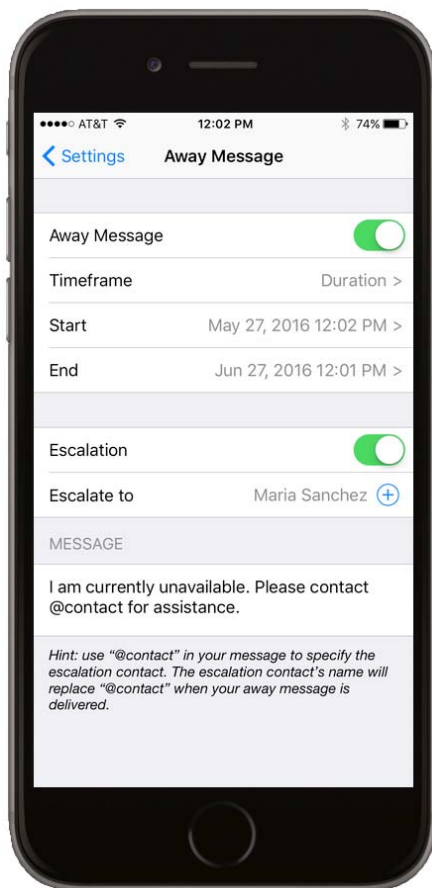
- 1 From the Conversations page, tap the Gear icon. The Settings page is displayed.



- 2 Tap Away Message to toggle it On. The Away Message defaults to Off: When the Away Message is Off, then the app hides the Away Message options and the Away Message will not be delivered. When Away Message is On:
 - **Timeframe:** Defaults to Duration. The options are Daily (then select the Every Day From and To time), Duration (then select the Start and End date and time), or Cancel (meaning, no change).
 - **Start:** Defaults to 1 minute after the current date and time. Select a time frame by tapping Start, scrolling to the desired date and time, and tapping Apply.

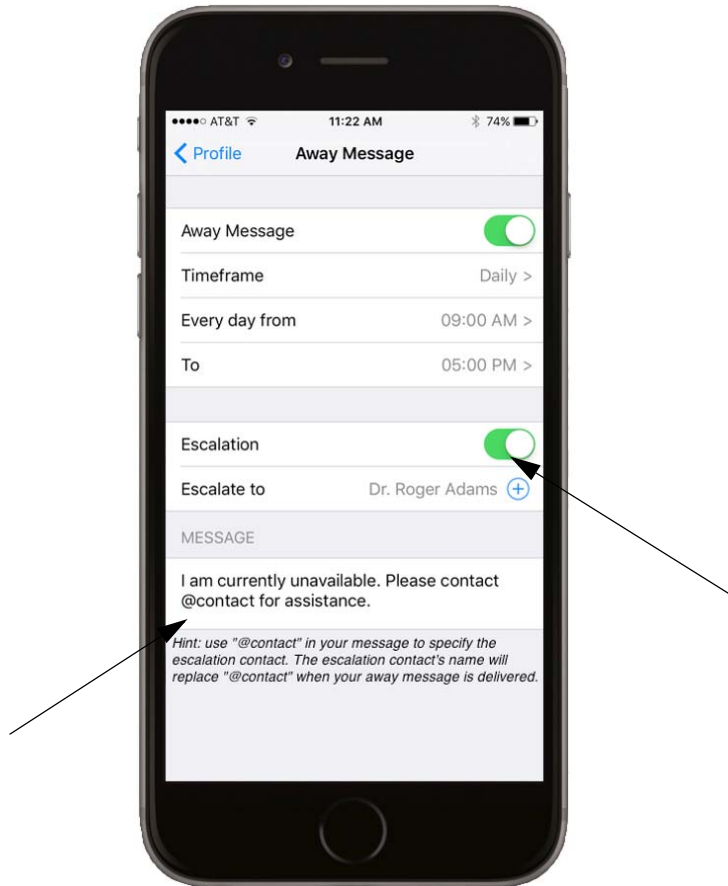


- **End:** Defaults to one month minus one day, 1 minute after the current date and time. Select a time frame by tapping End, scrolling to the desired date and time, and tapping Apply.





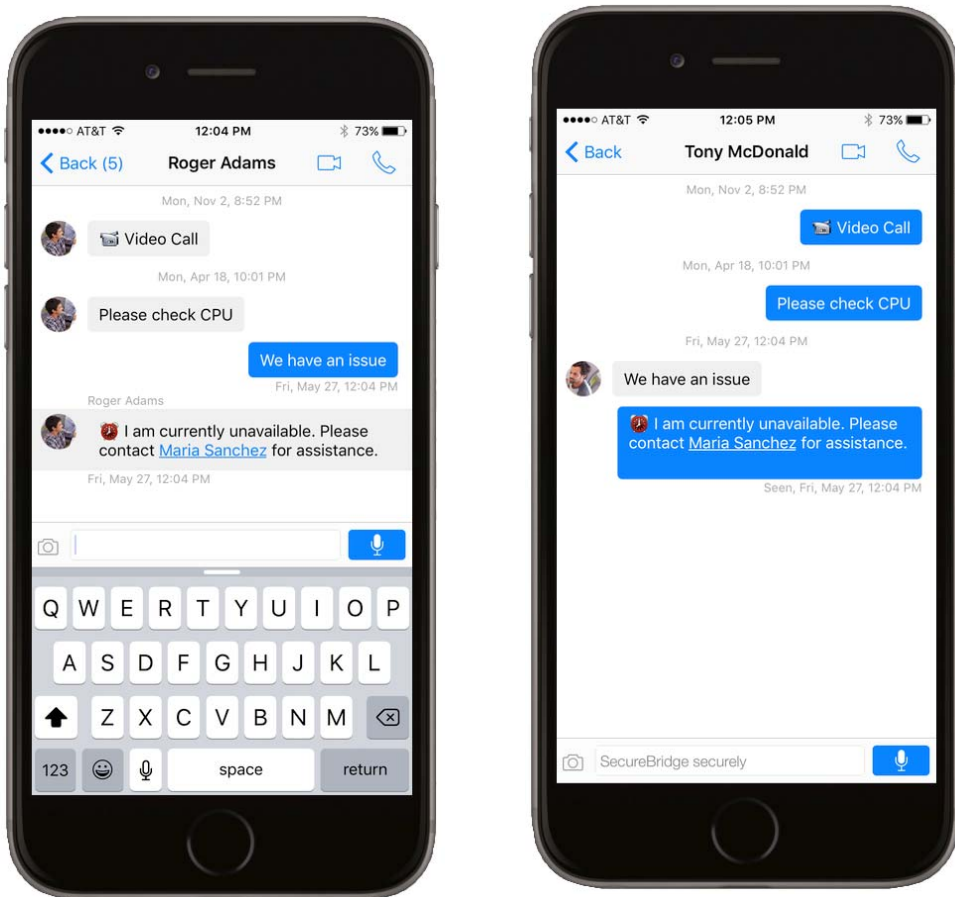
- **Escalation:** Defaults to Off. You can toggle Off to On. Then, from the Escalate To field, select the + button to navigate to the Choose a Contact page. The contact you select from this page is listed in the To field.



- **Message:** Type your “Away Message”. If you are using Escalation, use “@contact” in your message to specify the escalation contact. The escalation contact’s name will replace “@contact” when your Away Message is delivered.



If a contact sends a message to the user that is away, then the Away Message is delivered to the message sender.



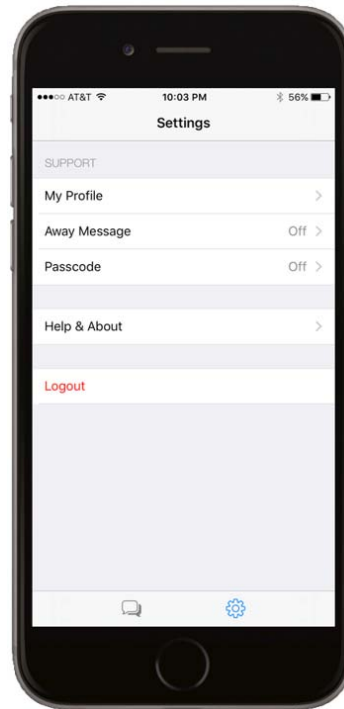
If the recipient of the Away Message selects the escalation contact hyperlink, then the app begins a new message to that escalation contact. If the recipient selects Cancel, then the user is returned to the original conversation.

To view additional Settings

- 1 From the Conversations page, tap the Gear icon.



The Settings page is displayed.



- 2 Tap the item you want to view.
 - **Help, Send Feedback, About SecureBridge, Terms and Application Version:** Users may access help documentation, send app feedback, get more information about the SecureBridge, and view the Terms and Conditions.
 - **Passcode:** The Passcode can be enabled for additional security. When enabled, a user will need to enter a PIN when entering the application (this is in addition to any security PIN/controls that may already be enabled on the device).
 - **Logout:** When users log out, they will actually continue to receive push alerts when they have a new message, even if they are logged out. If they do not want to receive push alerts they can either disable them from their device settings or they can delete the app from their device. Users remain logged in for up to a year or until they log out purposefully by clicking the Logout button. There is no need to log in each time they restart their device.

When you log out of the SecureBridge app, you are returned to the login screen you used to enter the app. For example, if you logged in as a Free User, you are returned to the Free User screen; if you logged in as an Everbridge Member, you are returned to the Everbridge Member screen.

If you logged in as an Active Directory User, your Key Phrase is remembered so you do not have to enter it every time you login.

Using SecureBridge

This chapter provides information to use your SecureBridge app.

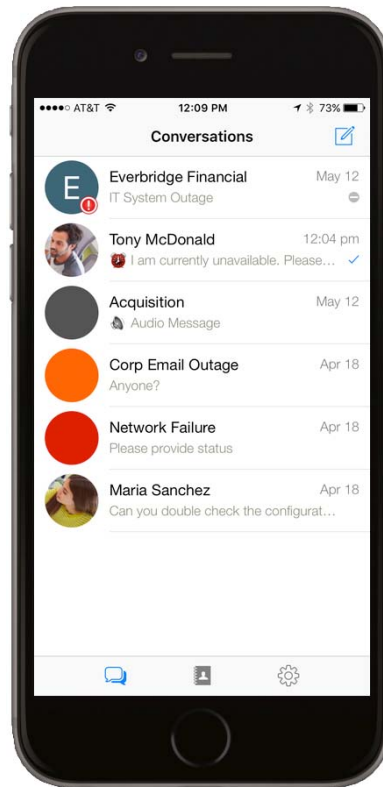
The following topics are covered:

- ◇ *Creating and Sending a New Message*
- ◇ *Starting a Group Chat*
- ◇ *Inviting Others to Sign Up for SecureBridge*
- ◇ *Using Directory Access*



Creating and Sending a New Message

You can send a secure message from SecureBridge. Once logged in, the default Conversations page is displayed.



When starting a new message, the first message sent must be Text or Audio Clip. Video/Voice Calls are not available until the chat session starts.

Audio and video call history is displayed with emojis in conversations.



To create a new message

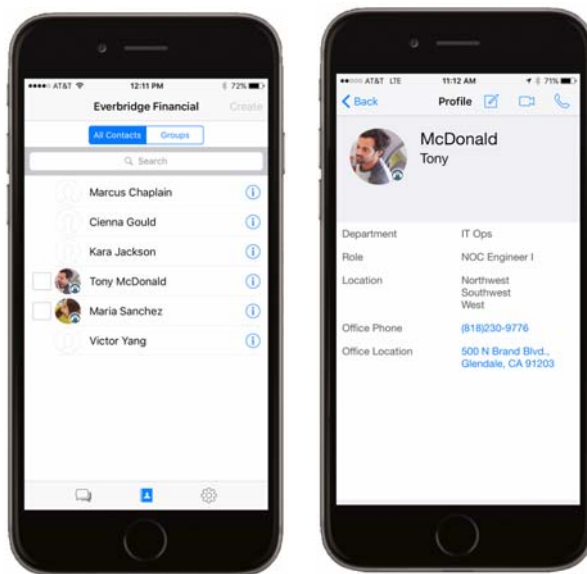
If you have Directory Access, you can view a contact's profile by tapping the Information icon located on the right-hand side of the contact's name.

The profile shows:

- ◆ First Name
- ◆ Last Name
- ◆ Organization
- ◆ All the contact's "Additional Information" set in Everbridge Suite.

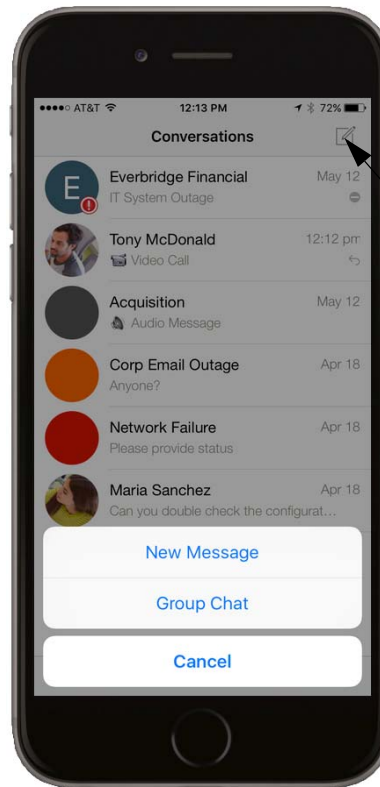
Directly from the profile, you can also make a:

- ◆ Video Call: Accessed by tapping the Video icon.
- ◆ Voice Call: Accessed by tapping the Phone icon.
- ◆ New Message: Accessed by tapping the New Message icon.





- 1 From the Conversations page, tap the New Message icon in the upper right-hand corner of the page.



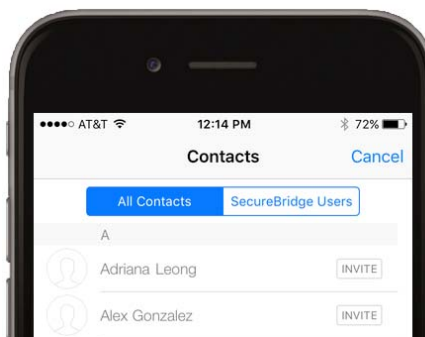
- 2 Tap New Message.



The New Message page is displayed.



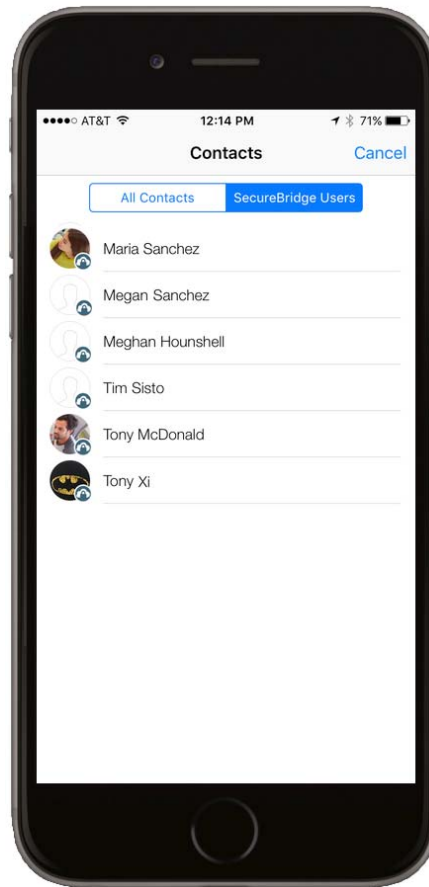
- 3 Either use the To: line to search for other SecureBridge users by their full email address or to search for other SecureBridge users you already know by entering their names, or tap the + icon in the upper right to select contacts from your Contacts list (address book). When selecting the contacts to include in your message:
 - Contacts from your device's address book who are not registered with SecureBridge are shown in the All Contacts tab with the option to INVITE the user.



- Tapping the INVITE button will launch your email or text application and being a text message or email to the person to invite them to download and register the SecureBridge app on their device for secure communication.



- Contacts from your device address book who have already registered with SecureBridge also display under the SecureBridge Users tab.



- Select the contact and add him/her to the message. If you would like to add more contacts to the message, tap the +icon again.

NOTE: Using Everbridge's premium service, contacts can be automatically in the SecureBridge Users tab Active Directory or LDAP to make it easy to find the appropriate recipient from an existing corporate directory.

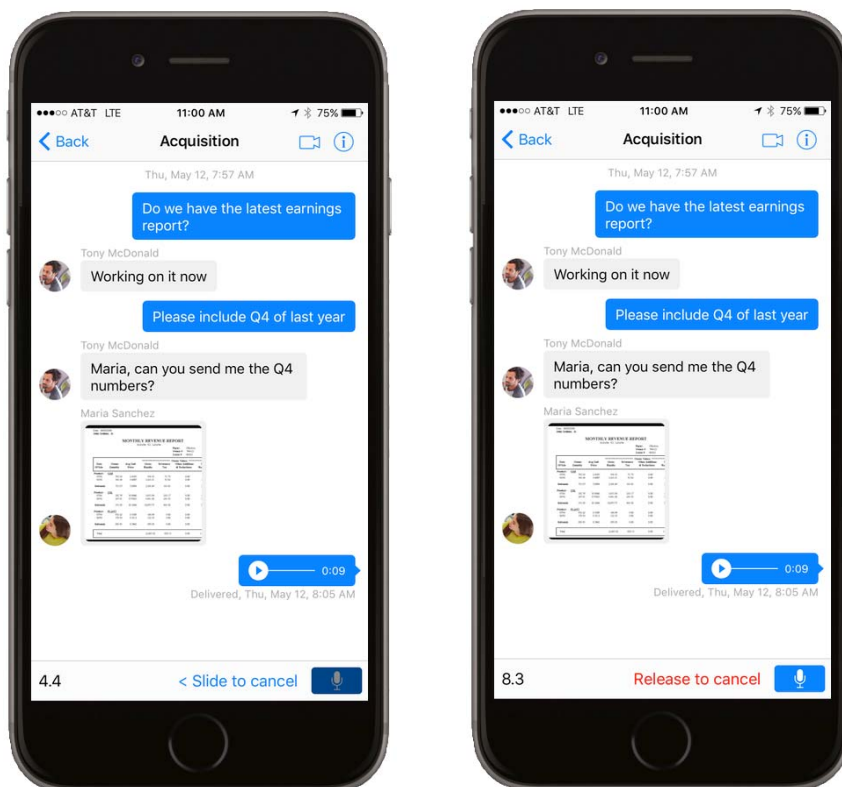
4 Send a message.

Once you have added at least one user for a secure chat session, there are five (5) types of messages you can send and receive:

- **Text Message:** Text securely using the text input window at the bottom of the app. When delivered, you see the Day, Date, and Time. The delivery status changes to "Seen" with the Day, Date, and Time when it is read. If the message is not yet sent, the chat bubble will be light blue. The bubble will then change to the dark blue once it has been sent.
- **Image Message:** Take a photo using the device camera or select from your photo book. When delivered, you see the Day, Date, and Time. The delivery status changes to "Seen" with the Day, Date, and Time when it is read.



- **Audio Clip (voice recording):** Press and hold the microphone button at the bottom right of the text entry page while you speak your message. Release the microphone button when you are done recording your message. When delivered, you see the Day, Date, and Time. The delivery status changes to "Seen" with the Day, Date, and Time when it is read.



NOTE: To cancel the recording before sending, slide your finger to the left and release. (If you change your mind and want to continue to record, slide your finger back to the right.)

- **Video Call:** Accessed by tapping the Video icon.
- **Voice Call:** Accessed by tapping the Phone icon.

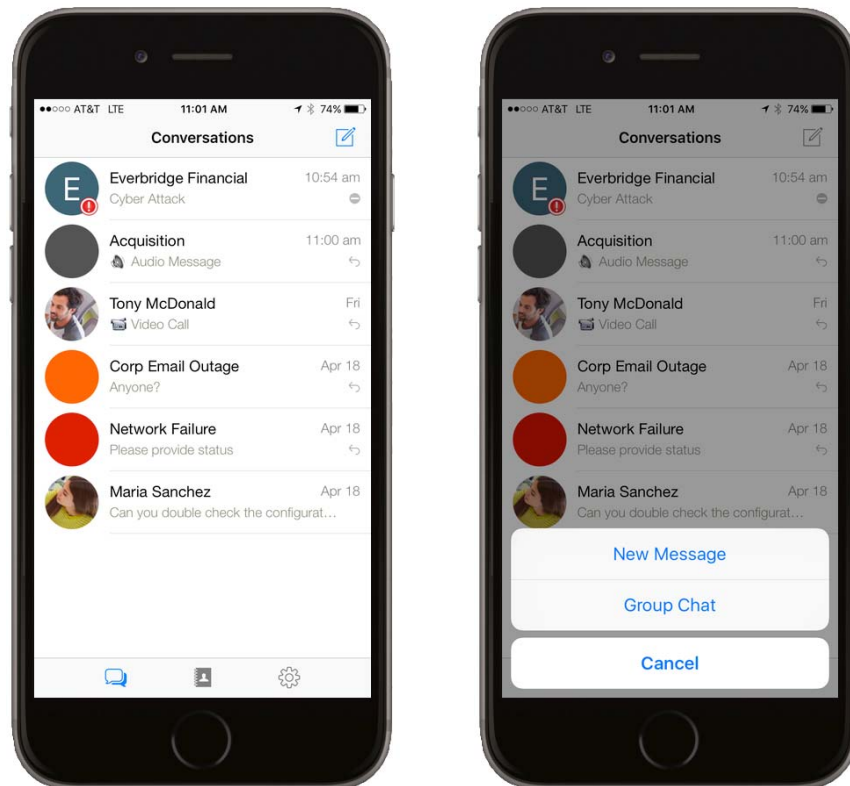


Starting a Group Chat

Sending a Group Chat is similar to chatting with a single individual as outlined previously. Once logged in to SecureBridge, the default Conversations page is displayed.

To start a Group Chat

- 1 From the Conversations page, tap the New Message icon, then tap the Group Chat button.



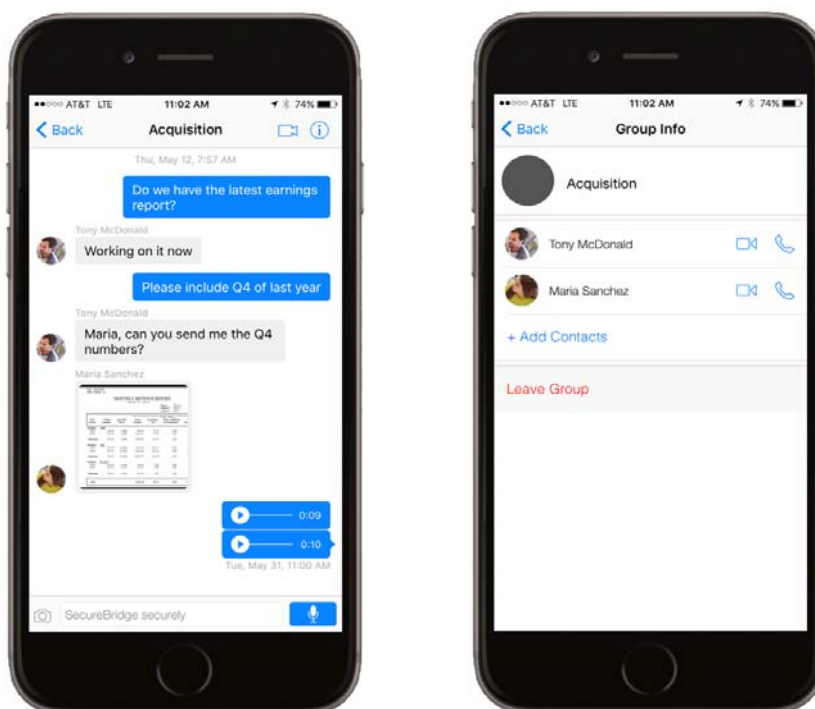
When creating your Group Chat, you can:

- Enter the name of the Group: It may be based on Group Name/Event Name/Patient Name.
- Add a Photo (Avatar) for the group for quick and easy recognition.
- Add multiple recipients by selecting from the list of contacts or searching based on contact name or using the Plus Sign icon.



- 2 Once you have selected the desired contacts to participate in the Group Chat, tap the Create button in the upper right of the app.

NOTE: The Add Contacts screen for Group Chat is very similar to a "One to One" secure message (outlined previously). The only difference is you can chat with more than one person at a time. You can give the conversation a name and avatar.



- 3 Start your Group Chat. Many of the same features outlined earlier are available:
 - Text, Image, Audio Clip, Voice Call, and Video Chat options apply as outlined earlier in this document.
 - New contacts can be added to the Group Chat using the Plus Sign icon in the top right of the screen.
 - A participant in the Group Chat can leave the Group at any time Group by clicking the Information icon.
 - Each participant can easily review the entire conversation -- regardless of whether they have been involved since the beginning of the chat session.
 - The Camera icon in the upper right enables you to initiate Voice/Video calls by selecting from a list of Group Chat participants.



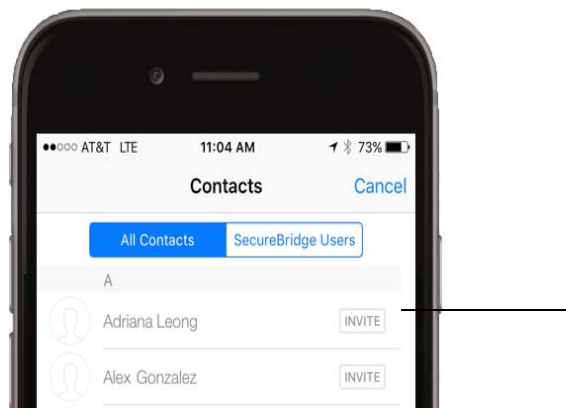
Inviting Others to Sign Up for SecureBridge

There are different ways to invite others to sign up for SecureBridge. From either the New Message or Group Chat screen, follow the desired procedure below.

- ◇ To invite a person from your device's address book
- ◇ To invite a person by entering his or her email address
- ◇ To invite a person by entering his or her phone number

To invite a person from your device's address book

- 1 From the New Message page, tap the + icon, as shown next. "All Contacts" pulls in all of the contacts from your device address book and other users with whom you are connected. Any contacts that are in your address book but not already SecureBridge users will have an "INVITE" icon next to their names.

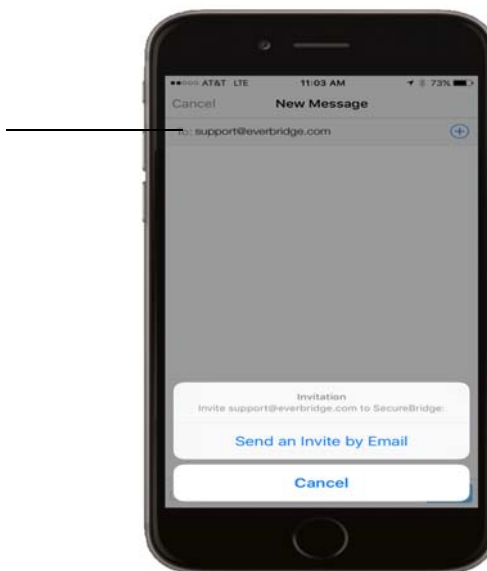


- 2 Click the INVITE button and the app asks if you want to invite the contact by email or text.
- 3 Choose one of the following:
 - Email—Your native emailing app opens. A new email is started to that person's email address (as per that contact entry in your device's address book) and contains default text in the invitation.
 - Text—Your native texting app opens. A new text message is started to that person's mobile phone number (as per that contact entry in your device's address book) and contains default text in the invitation.



To invite a person by entering his or her email address

- 1 In the "To:" field, enter the full email address of the person who is not already using SecureBridge.

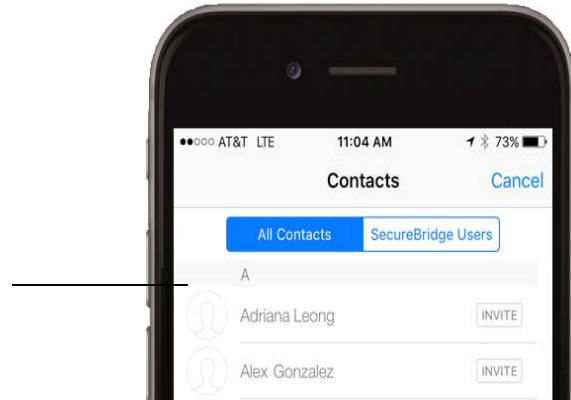
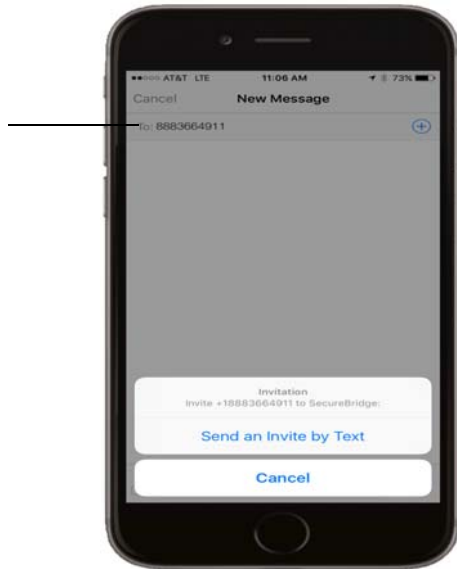


- 2 Tap Return on the device keyboard (or tap anywhere outside of the "To:" field). After a moment, the app displays a message, "invite *fulladdress@domain.com* to SecureBridge: Send an invite by email".
- 3 Tap Send an Invite by Email. Your native emailing app opens. A new email is started to that person's email address (as you entered it in SecureBridge) and contains default text in the invitation.



To invite a person by entering his or her phone number

- 1 In the “To:” field, enter the full phone number of the person who is not already using SecureBridge.

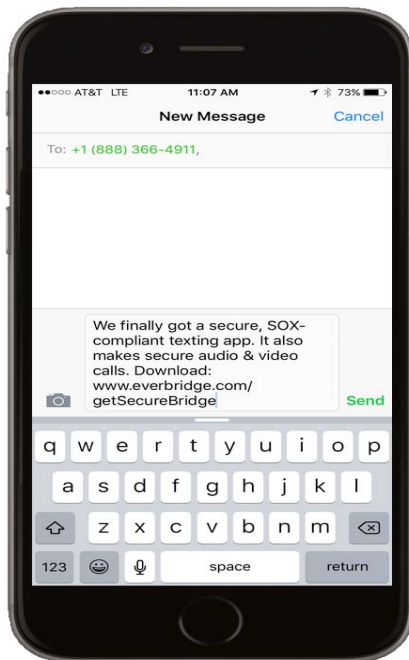


Tap Return on the device keyboard (or tap anywhere outside of the “To:” field). After a moment, the app displays a message, “+1nnnnnnnnnn to SecureBridge: Send an invite by Text”.

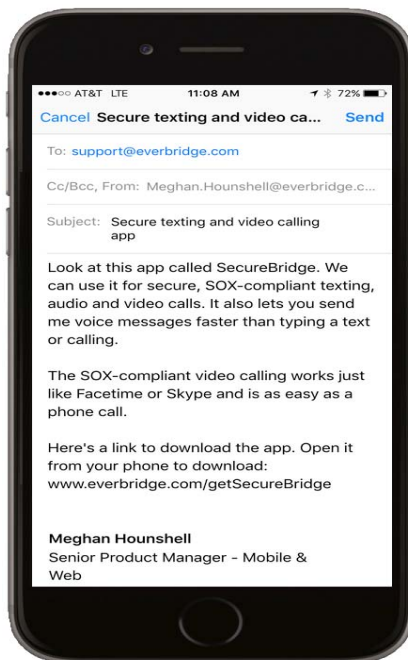
- 2 Tap Send an Invite by Text.



Your native emailing app opens. A new text message is started to that person's phone number (as you entered it in HipaaBridge) and contains default text in the invitation.



3 Click Send.



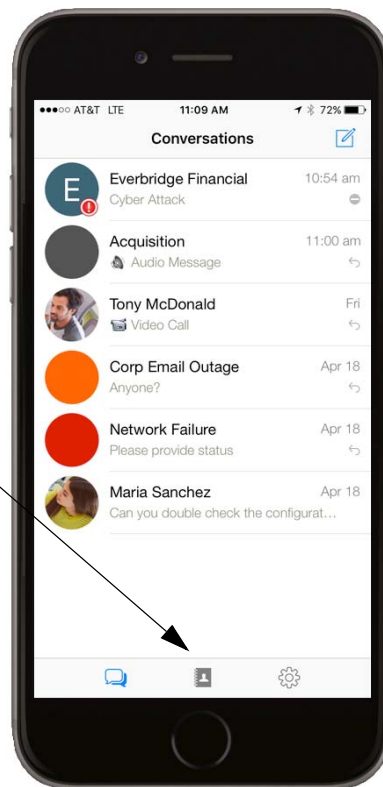


Using Directory Access

Your organization can allow its Secure Messaging users to view and securely communicate with your (the administrator's) contact database. (The administrator enables the Organization *Directory in Peer-to-Peer Messaging: Settings*. For details, see *Peer-to-Peer Messaging* on page 560.)

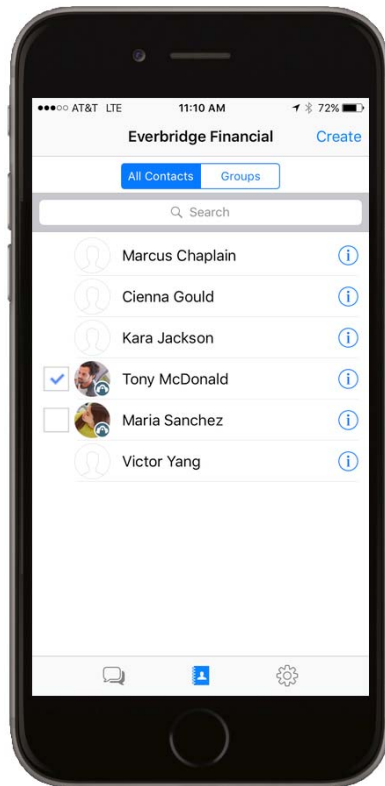
NOTE: If Organization Directory is enabled, then all organization contacts and all organization groups are viewable by all your Secure Messaging users.

When the organization is enabled, the Directory icon displays in the client application.



To use Directory Access to find contacts

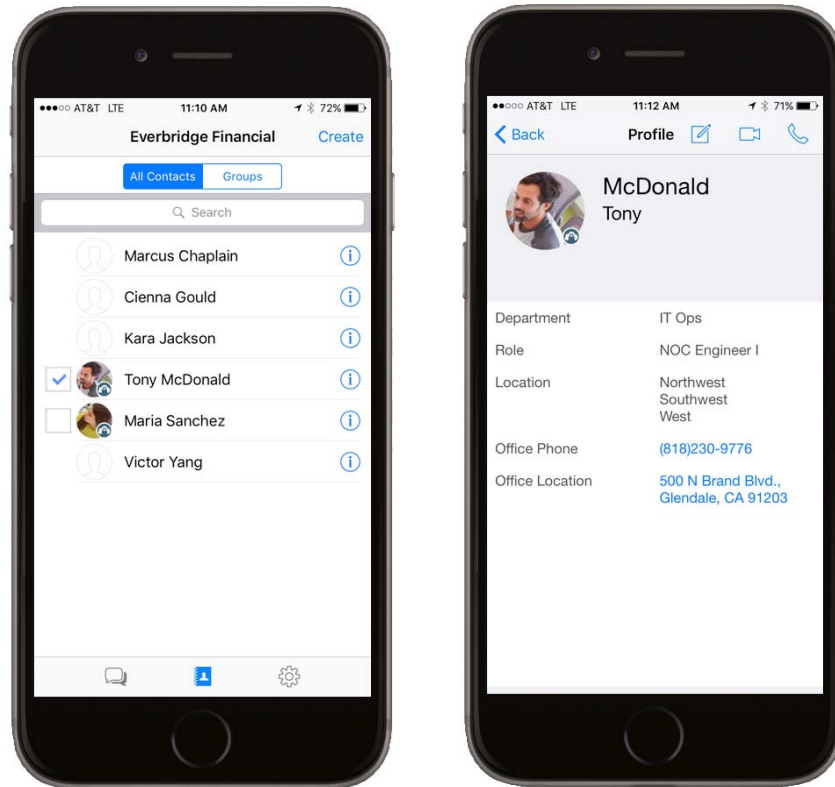
- 1 Tap the Directory icon to display the All Contacts tab in the organization.



- 2 Optionally, use the Search feature.
You can enter a First Name and/or a Last Name to search the entire contact list.
 - All contacts in this list are contacts from the user's EB organization.
 - If they are also a SecureBridge user, they will have a check box and an avatar to the left of their name.
 - No avatar and no check box indicates that the person is a contact in the organization but as not yet registered with SecureBridge. This type of contact is disabled for use with Secure Messaging communications.
- 3 When you find your desired contact name, select the check box next to his/her name.
- 4 Optionally, tap the desired contact's Information icon.



When you have Directory Access, you can view a contact's profile by tapping the Information icon located on the right-hand side of the contact's name.



The profile shows:

- First Name
- Last Name
- Organization Name
- All the contact's "Additional Information" set in Everbridge Suite.

If the contact is a Secure Messaging user, you will also see an avatar. Directly from the contact's profile information, you can place a video call, audio phone call, or start a new conversation.

- Video Call: Accessed by tapping the Video icon.
- Voice Call: Accessed by tapping the Phone icon.



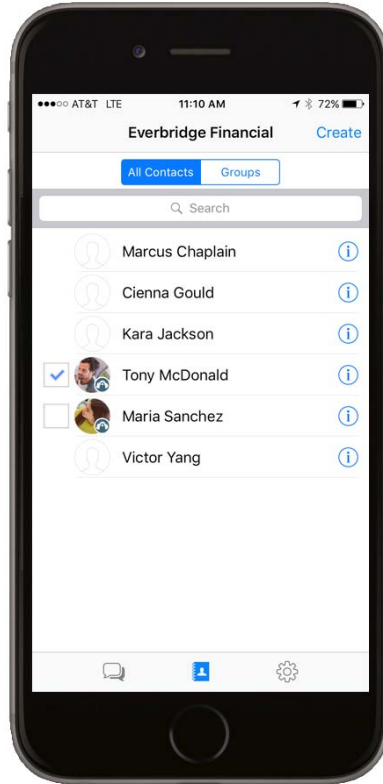
- New Message: Accessed by tapping the New Message icon.





To use Directory Access to find groups and contacts

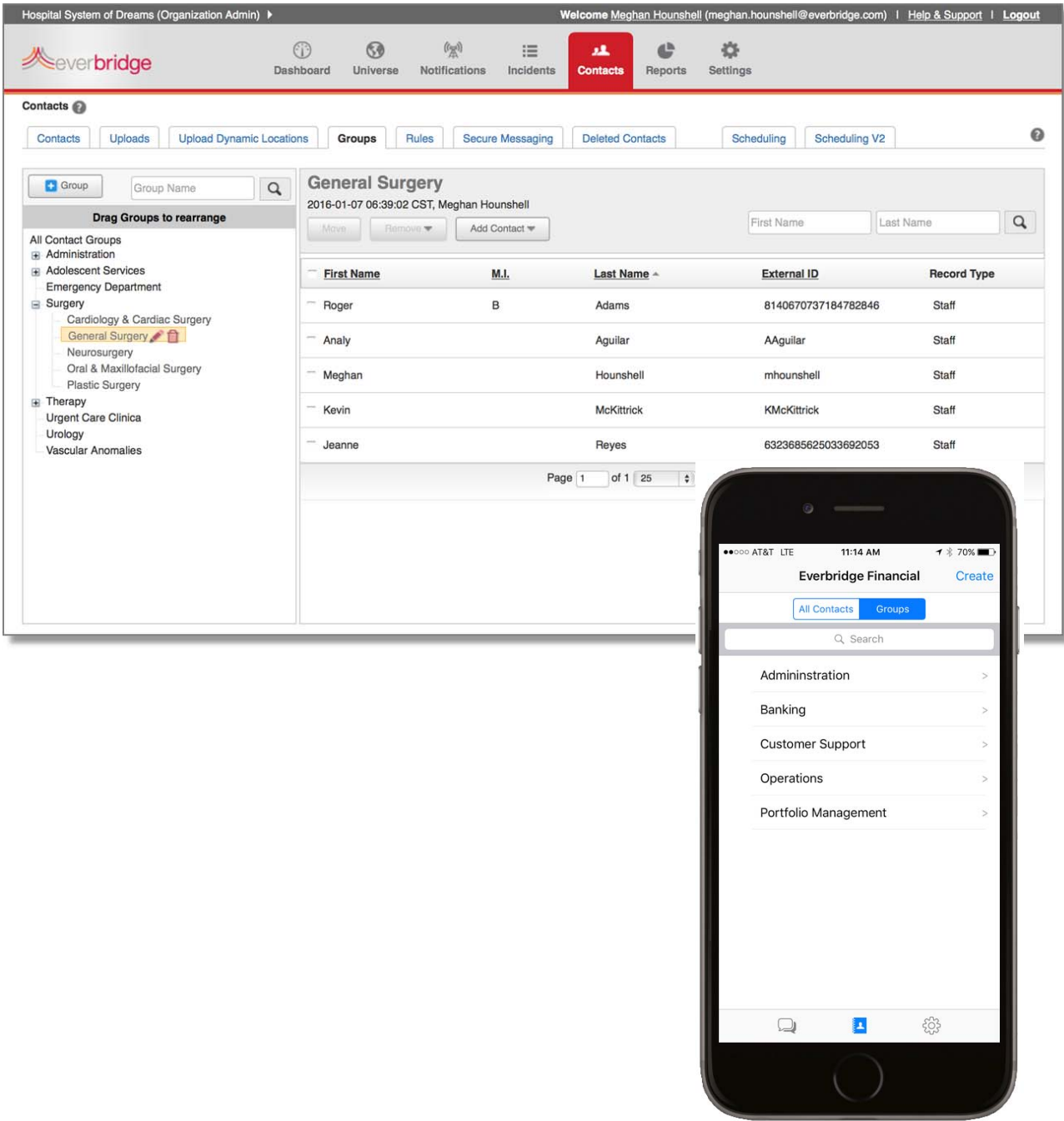
- 1 Tap the Directory icon to display the All Contacts tab in the organization.



- 2 Tap the Groups tab to display the groups in the database.



The group names are the same as the Group names in Everbridge Suite.

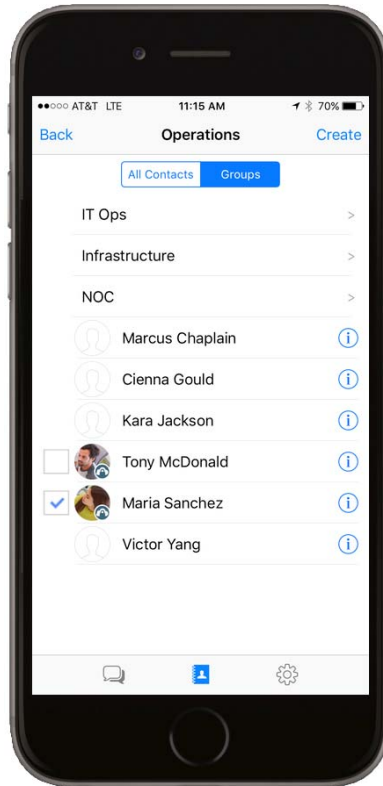


The Directory allows access to all contacts and groups. When you tap the Groups tab, the first level (highest level) of groups is displayed.

- 3 Select a group to see the contacts belonging to that group and its sub-groups, if any.
- 4 Drill down through the nested groups as needed.

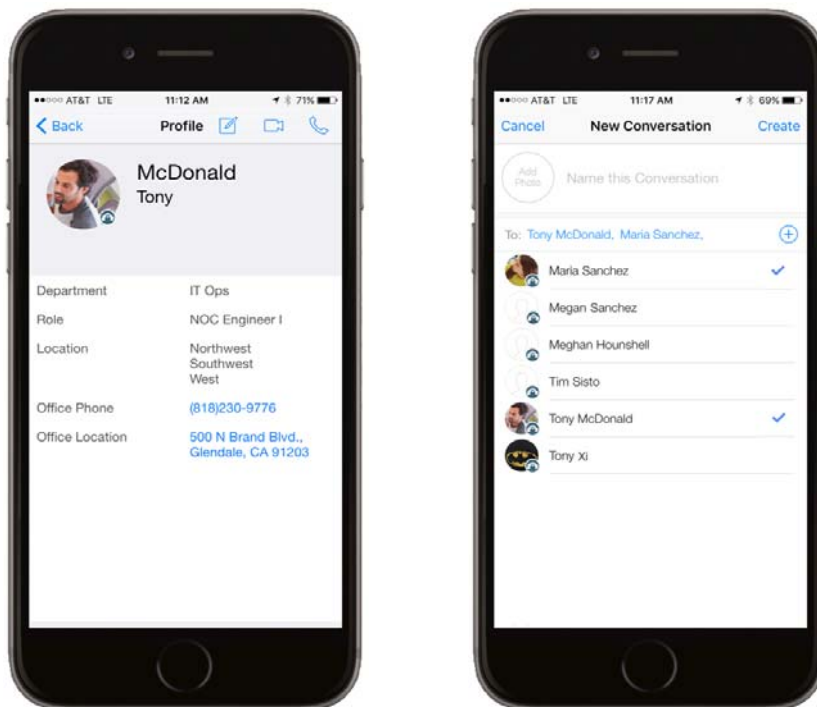


- 5 Optionally, use the Search feature to search for a specific group, no matter where it is nested in the hierarchy of groups.
- 6 Select the desired contacts within the group.





- 7 Optionally, tap the Information icon to select a contact's profile. (For details, see *step 4* on page 43 of the procedure *To use Directory Access to find contacts.*)



- 8 Tap Create to create a Group Chat "New Conversation".
- 9 Give your conversation a name.
- 10 Proceed as usual to enter and send your message.



Secure Messaging Notifications

This chapter provides information to set up your organization to send notifications to SecureBridge and what happens in SecureBridge when a notification is received. The examples in this chapter show Notifications when using the SecureBridge app from an Apple iPhone. Your screens might not look exactly like the examples, but the features are the same when using the SecureBridge app from a Google Android.

The following topics are covered:

- ◇ *Setting Up Your Organization*
- ◇ *Sending a Notification*



Setting Up Your Organization

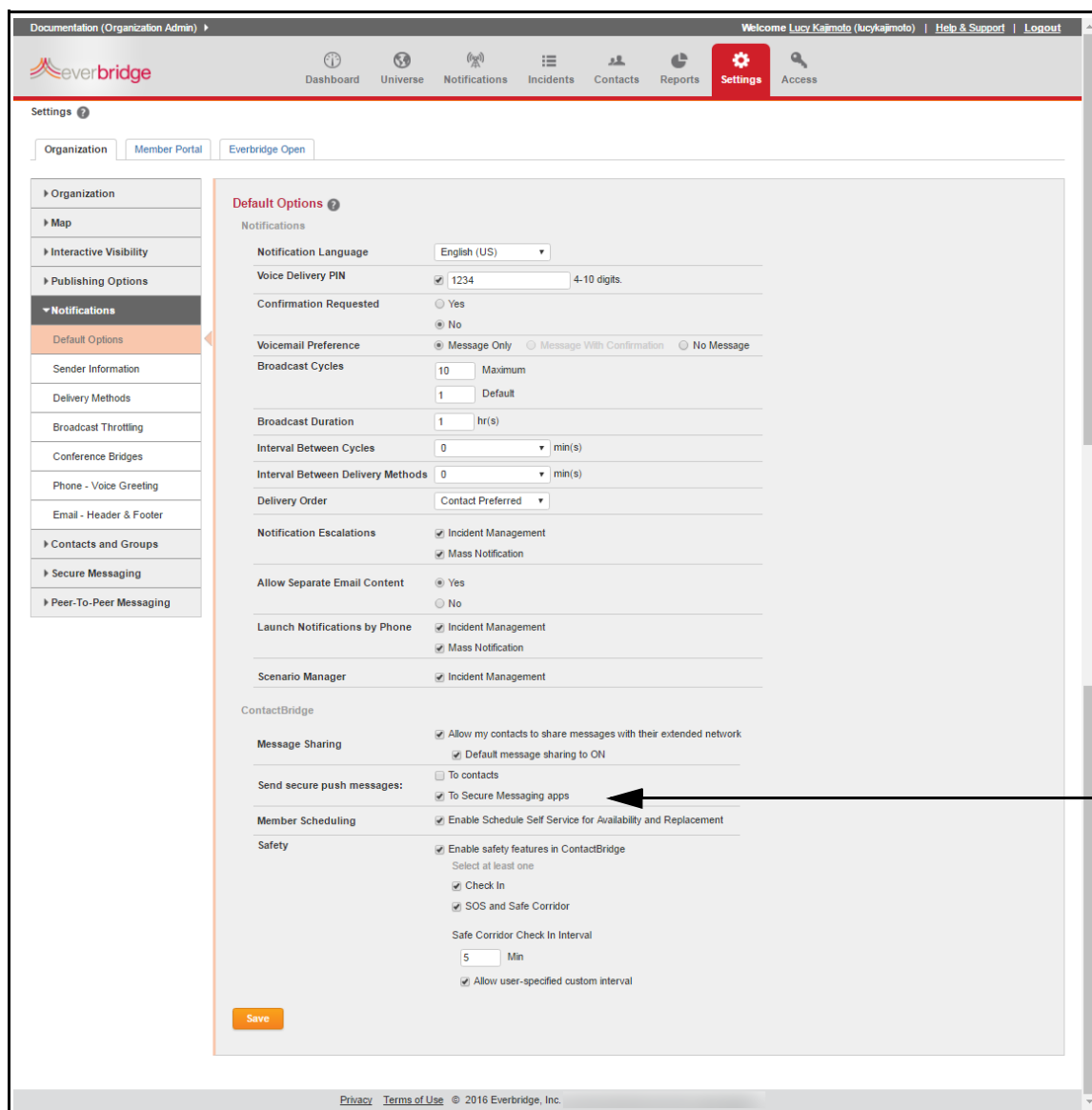
The Notifications settings allow you to directly configure many default options within the Everbridge Suite system. It provides immediate access to the Organization settings so that you can adjust them specifically to your organization's preferences.

NOTE: The Notifications settings are also available from the Account level. The following are the same as described for the Organization level: Notifications > Default Options, Notifications > Sender Information, Notifications > Delivery Methods, and Notifications > Broadcast Throttling.



Default Options

Enter your default options and click Save when you are done. When you are sending a notification, you can change these settings if needed. Configuring the most commonly used settings as the default options reduces the chances of human error while sending the notification.

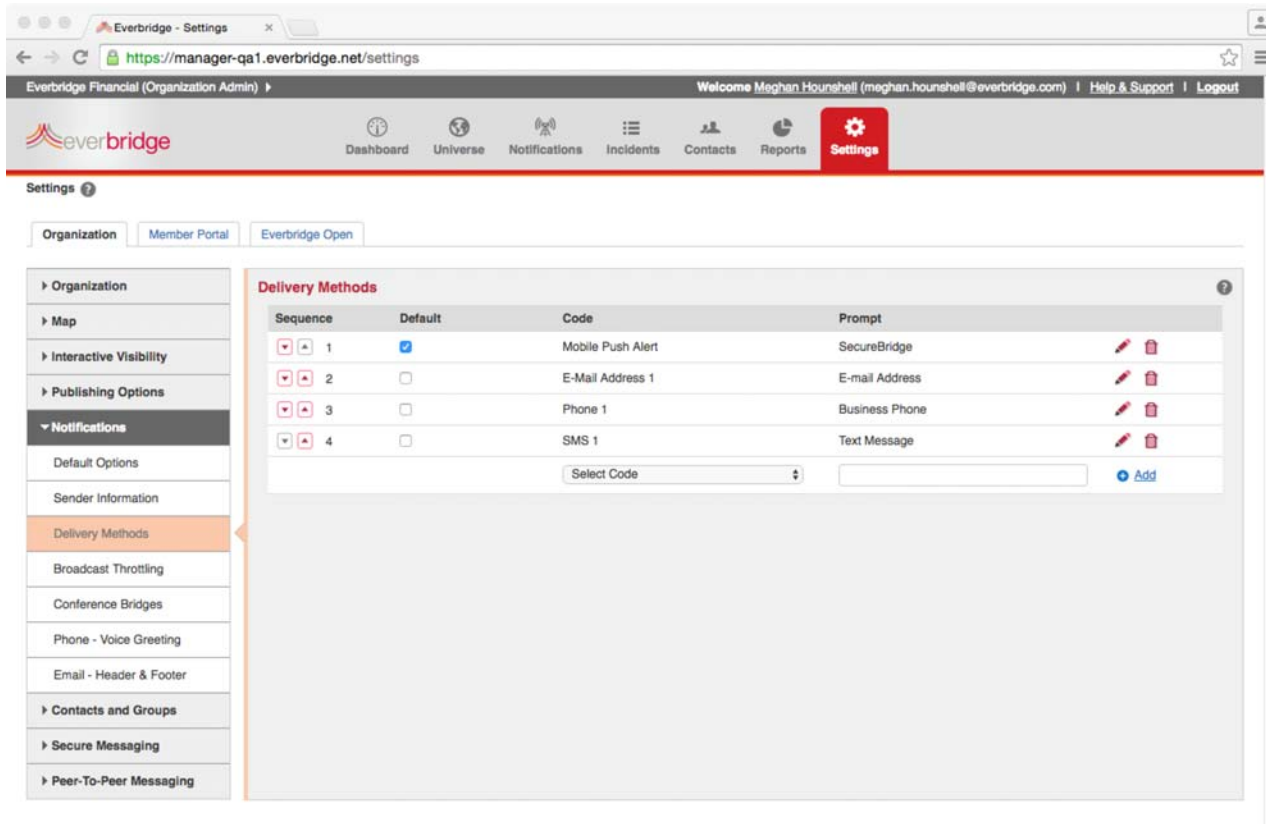


Under ContactBridge, Send Secure Push Messages, select the check box: To Secure Messaging Apps. When this check box is selected, organizations can send notifications to SecureBridge.



Delivery Methods

You can configure the delivery methods available in the Everbridge Suite system. You can view the various delivery methods (path codes) by selecting them from the drop-down list. Selecting the path codes your organization prefers, including selecting the Default check box for each delivery method, reduces the number of options to select to launch a message and can help reduce human error. That is, the notification initiator does not have to select as many options for deployment.



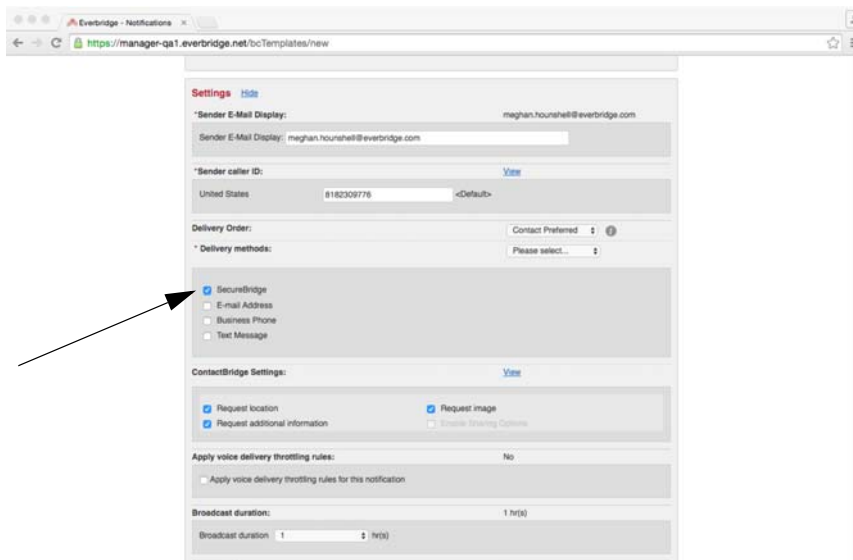
Mobile Push is the delivery method that is used for SecureBridge. Be sure to add Mobile Push Alert as a delivery method. Name the prompt as your organization prefers.



Sending a Notification

Send the notification as discussed in the *Notifications* chapter of the *Everbridge Suite User Guide*.

Under Settings, make sure to choose the prompt name that corresponds with the “Mobile Push Alert” delivery method. (In this example, the prompt name is SecureBridge.)



When the notification is delivered, the recipients receive a push alert on their devices from the app and will be “from” the organization name.

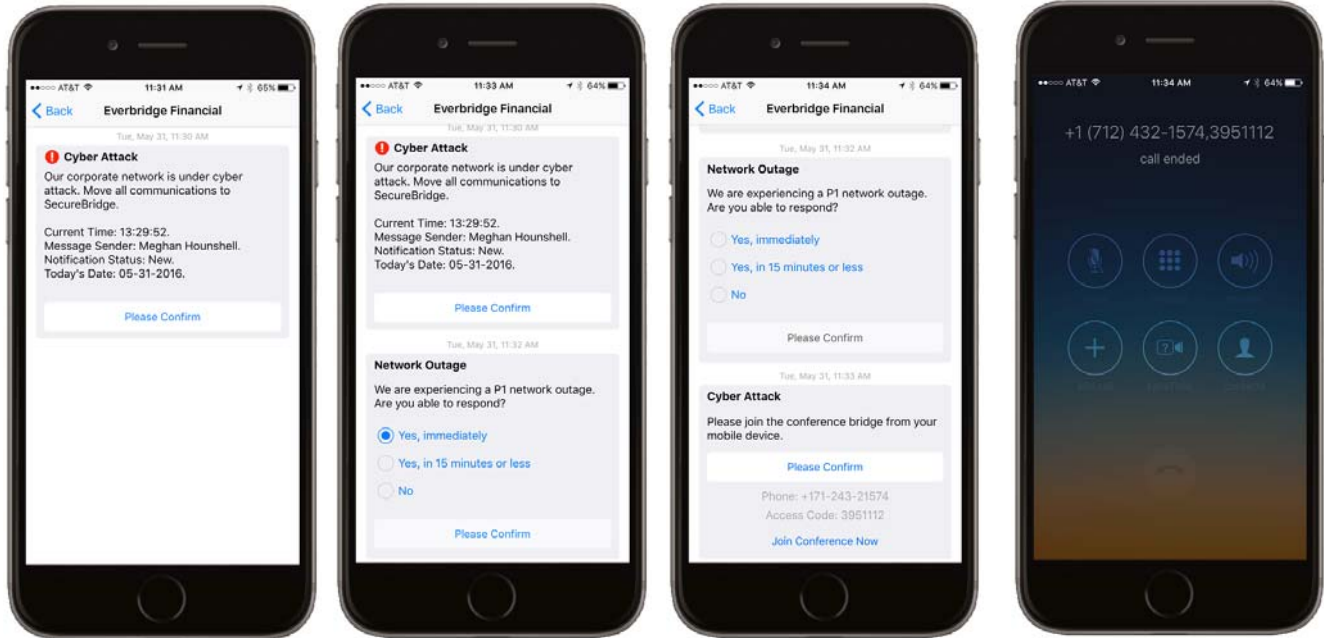


NOTE: If the organization and contact are using both ContactBridge and SecureBridge (or ContactBridge and HipaaBridge), then the notification is delivered to both apps.



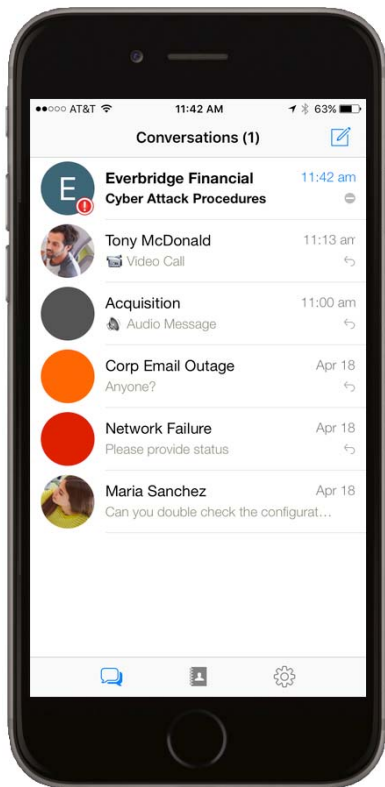
Notification Types

You can send Priority and Non-Priority, standard, polling, and conference notification types.



Conversations

All notifications sent from the organization appear in a "conversation" with the organization.

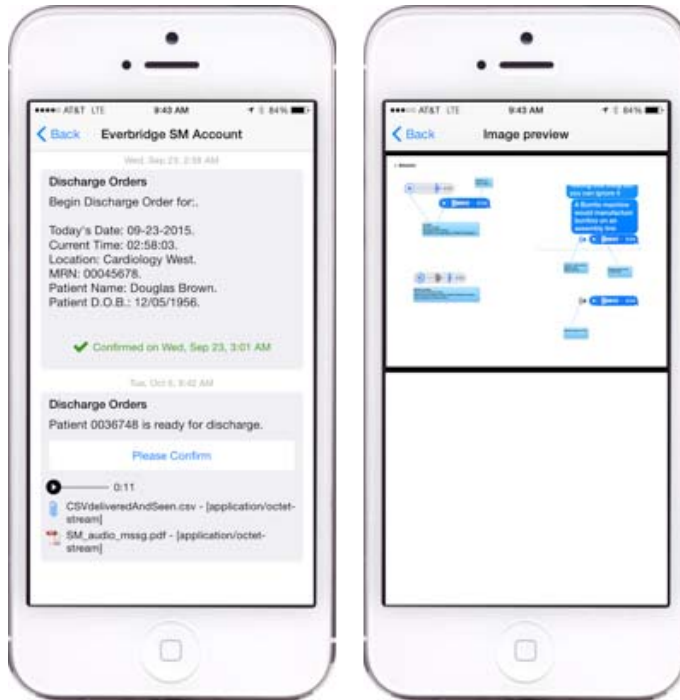




Files in the Notification

A notification with a voice message is delivered as a voice file that can be played within the app.

File attachments are also delivered. However, users can only view PDF and image file attachments. When viewing a file attachment (PDF and/or image file), that attachment opens within the app in order to maintain proper security and compliance.





Secure Messaging User

Individuals who have both a contact record and a secure messaging user record in the same organization will have "Secure Messaging User = Yes" in their contact record. This field can be used for searching and reporting.

The screenshot shows the Everbridge Contacts management interface. An 'Advanced Search' modal is open with the following configuration:

Field	Condition	Value
Secure Messaging User	true	

Buttons for 'Search' and 'Clear' are visible. Below the search modal, a table of contacts is displayed:

	First Name	M.I.	Last Name - Suffix	External ID	Record Type	Last Modified Date	Last Modified By
<input type="checkbox"/>	Roger		Adams	4291842348120824035	Employee	2016-05-31 13:27:50 CDT	RogerAdams
<input type="checkbox"/>	Tony		McDonald	1270495079199574527	Employee	2016-05-27 14:03:32 CDT	TonyMcDonald
<input type="checkbox"/>	Maria		Sanchez	164814245293647886	Employee	2016-05-12 10:02:11 CDT	MariaSanchez

The screenshot shows the 'Create Custom Report' interface in Everbridge. The report is configured as follows:

- Report type:** Contacts
- DATA (All the information that will appear in your report):** Contact First Name, Contact Last Name
- FILTERS (OPTIONAL):** Secure Messaging User (Condition: false)

Buttons for 'Preview Report', 'Export PDF', and 'Export CSV' are visible. A 'Preview' section at the bottom shows a sample of the report output:

Contact First Name	Contact Last Name
Victor	Yang
Marcus	Chaplain
Kara	Jackson



Using the SecureBridge Web Client

This chapter provides information about using the SecureBridge web client user interface.

The following topics are covered:

- ◇ *Overview*
- ◇ *Conversations*
- ◇ *Profile*
- ◇ *Away Message*
- ◇ *Logout*



Overview

Your Secure Messaging web client is synced with your Secure Messaging (SecureBridge) account. You can access the same resources from the web client as you do from your app, including:

- ◇ Having conversations with contacts and group
- ◇ Updating your profile
- ◇ Changing the status of your Away Message

Access the SecureBridge web client at: SecureBridge.Everbridge.net. You can login as a “free user”, an Everbridge member (that is, you already have Member Portal credentials), or with your SSO (Single Sign-On) credentials.

SecureBridge logo

Login to SecureBridge

Email

Password

Login

[Forgot Password?](#)

[Sign Up](#) [Everbridge Member?](#)

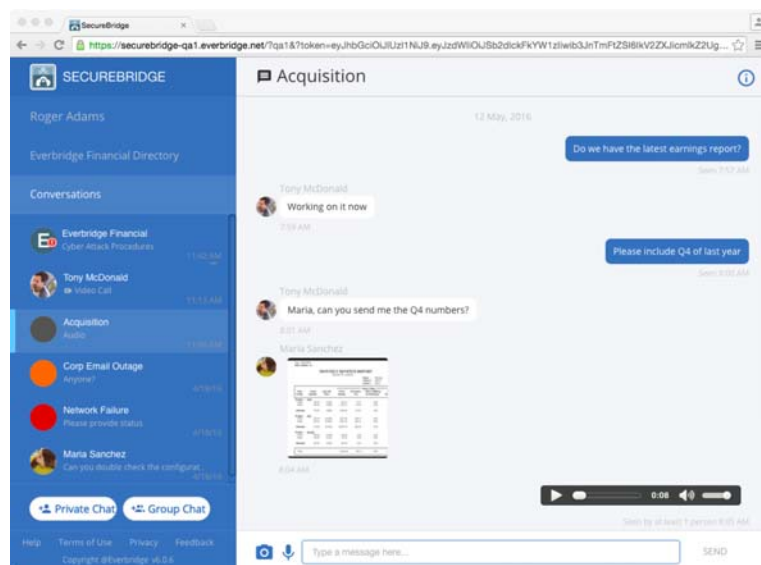
[Privacy Policy](#)

Anything you can do in the SecureBridge mobile app, you can do in the SecureBridge web client.

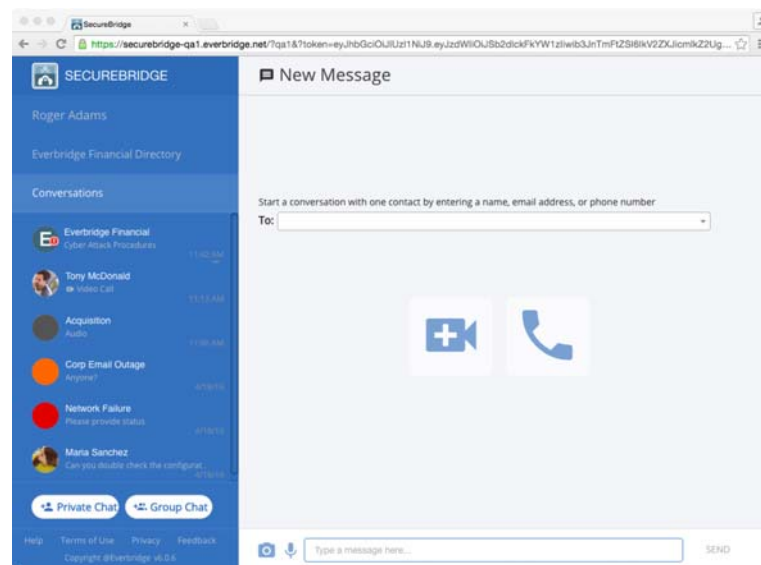


Conversations

After logging in, the default Conversations page appears. The left-hand side of the page is a navigation pane. The right-hand pane shows conversations. (In the following example, there are no conversations.)



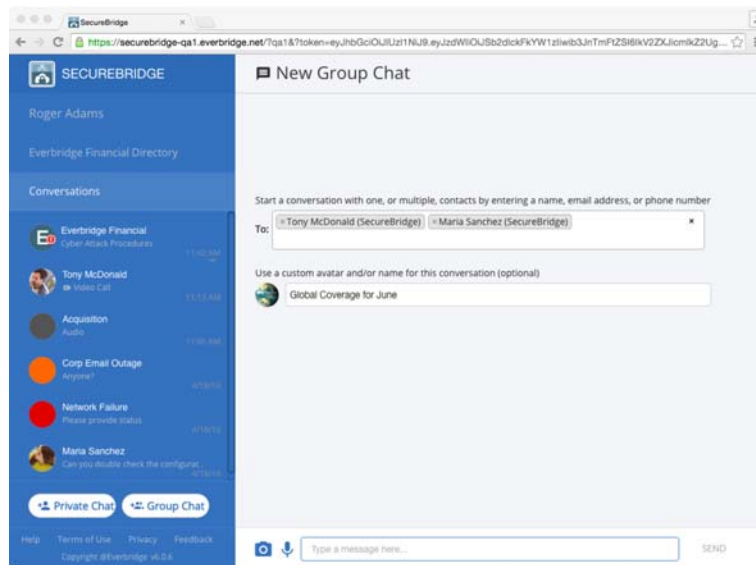
Private Chat



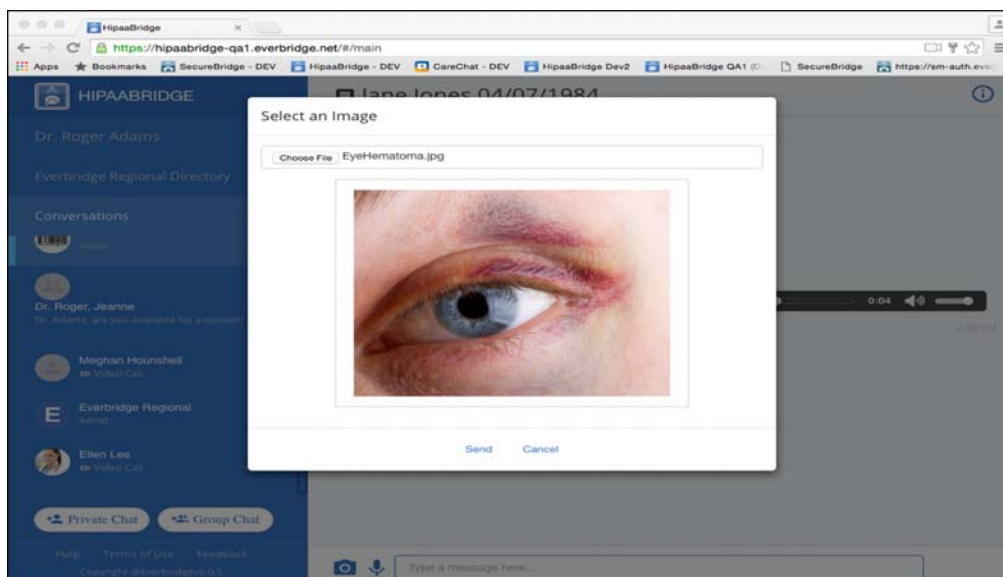


To chat privately

- 1 From the Conversations page, click Private Chat.
- 2 Follow the on-screen instructions to start a conversation with one or more contacts. Once you have added at least one user for a secure chat session, there are five (5) types of messages you can send:
 - **Text Message:** Text securely using the text input window at the bottom of the app. Then click Send. When delivered, you see the Day, Date, and Time. The delivery status changes to "Seen" with the Day, Date, and Time when it is read.

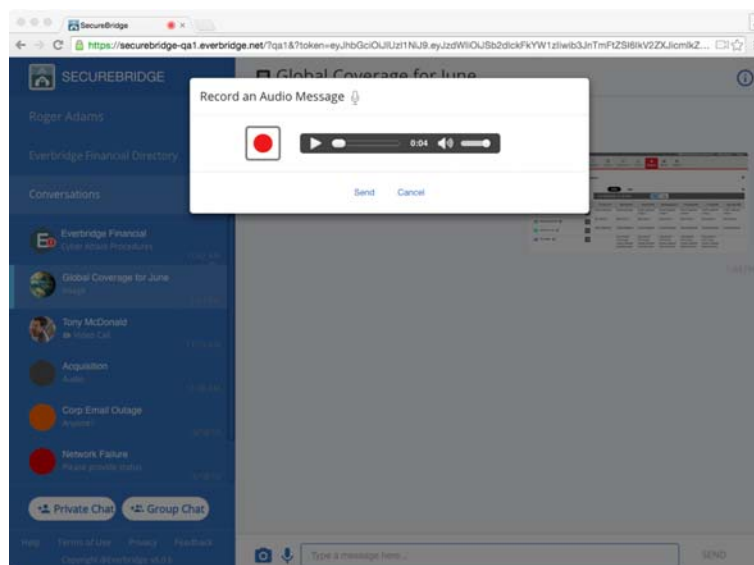
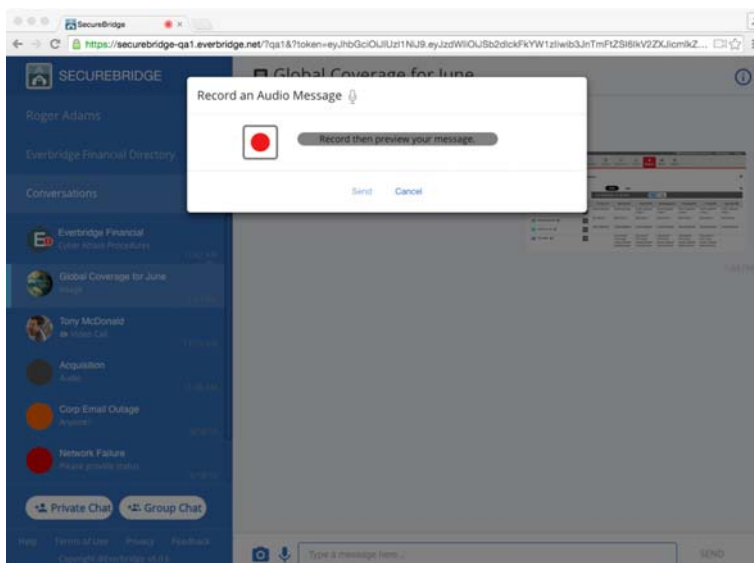


- **Image Message:** Upload images to your computer so you can choose one or more as needed. When delivered, you see the Day, Date, and Time. The delivery status changes to "Seen" with the Day, Date, and Time when it is read.





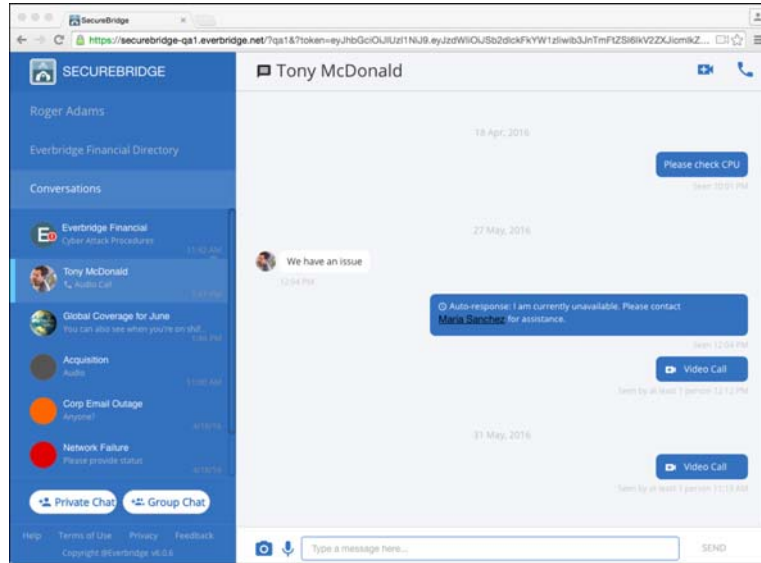
- **Audio Clip (voice recording):** Click the microphone button at the bottom of the page. In the Record an Audio Message dialog, click the red button to record your message, then the black button to stop recording. Preview the message when you are done recording by clicking the Play button. Click Send. When delivered, you see the Day, Date, and Time. The delivery status changes to “Seen” with the Day, Date, and Time when it is read.



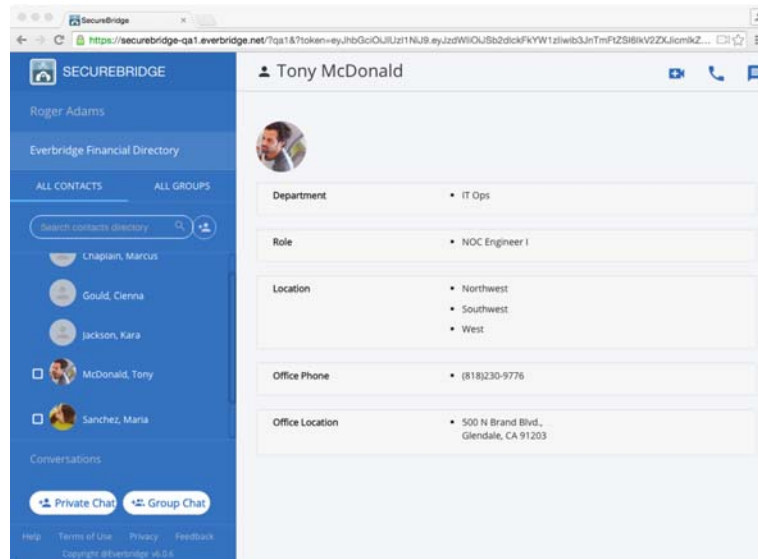
- **Video Call:** Accessed by clicking the Video icon.
 - **Voice Call:** Accessed by clicking the Phone icon.
- 3 Perform the actions for the type of message you want to send.



Audio and video call history is displayed with emojis in conversations.

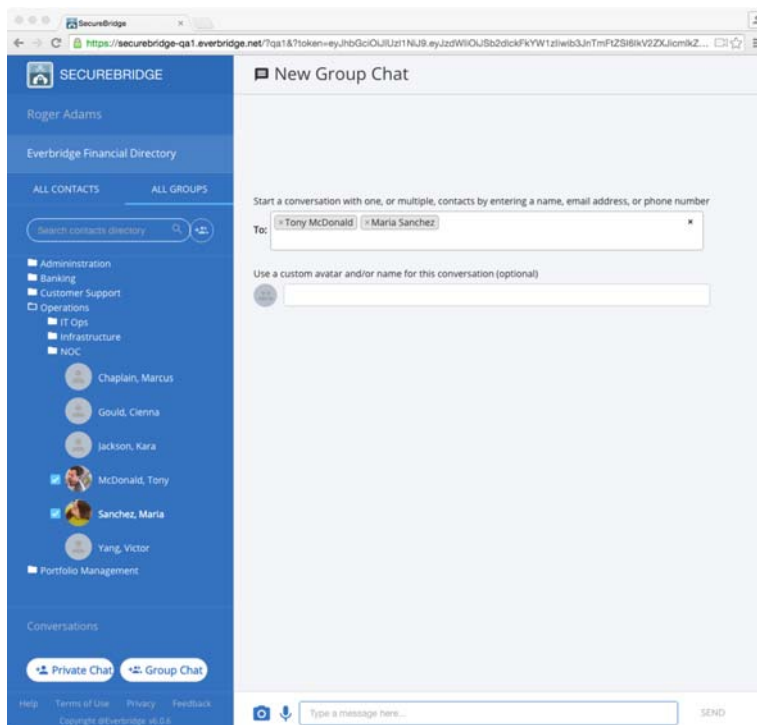


The following demonstrates what the contact's profile from the directory looks like in the web client:

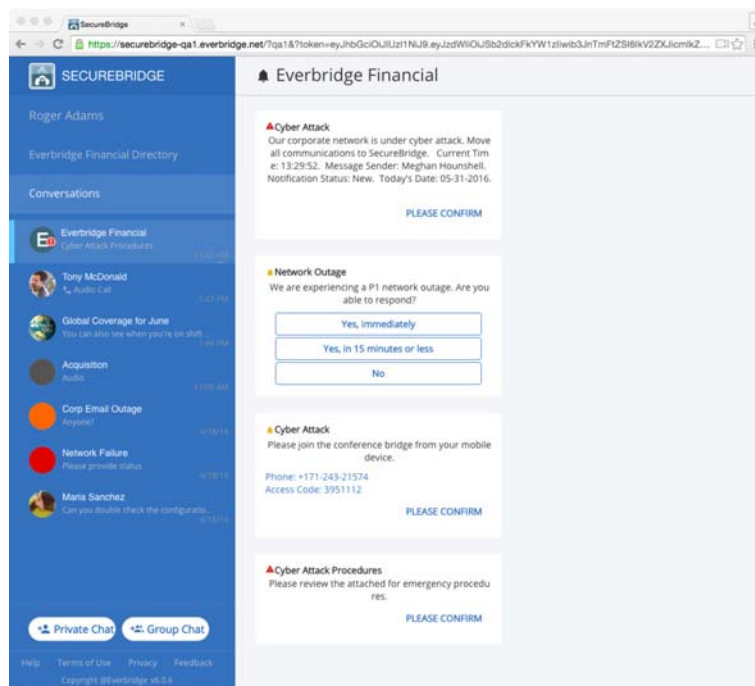




The Groups feature from the directory:



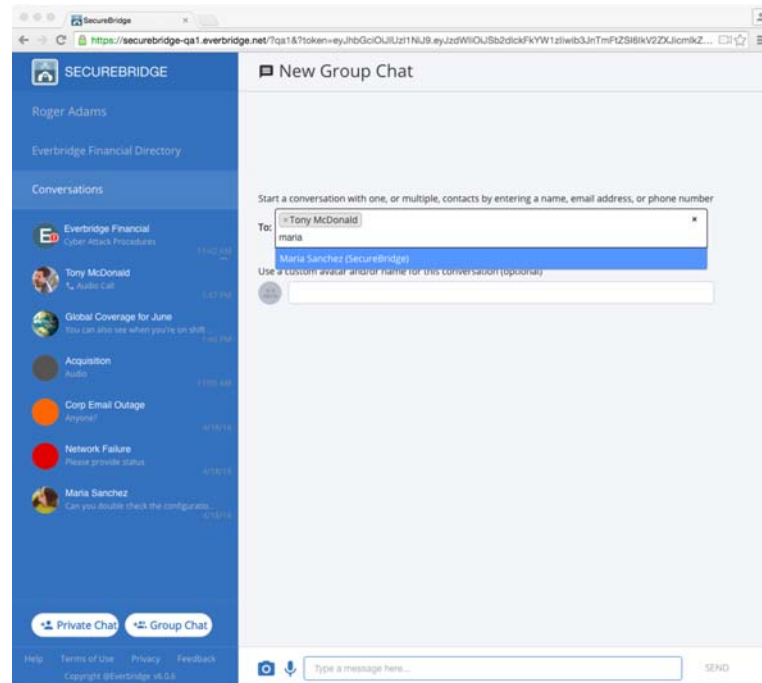
A notification from the organization:





To start a new group chat

- 1 From the Conversations page, click Group Chat.

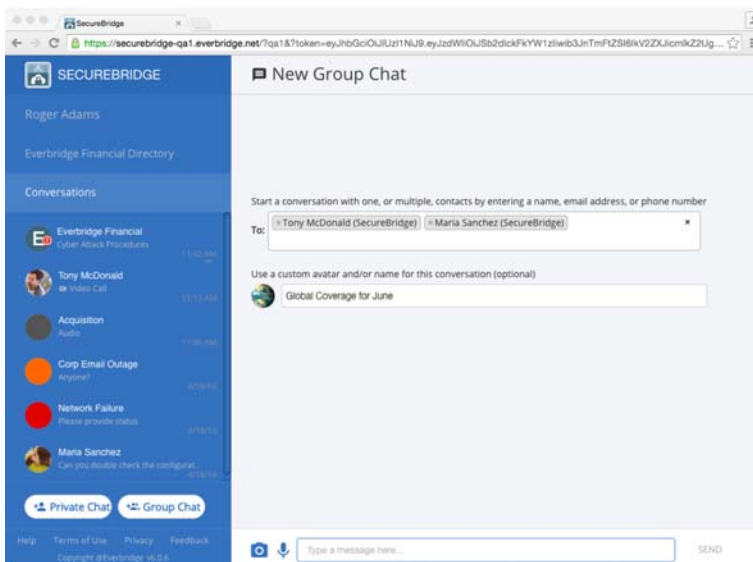


- 2 Follow the on-screen instructions to start a conversation with one or more contacts and/or groups.

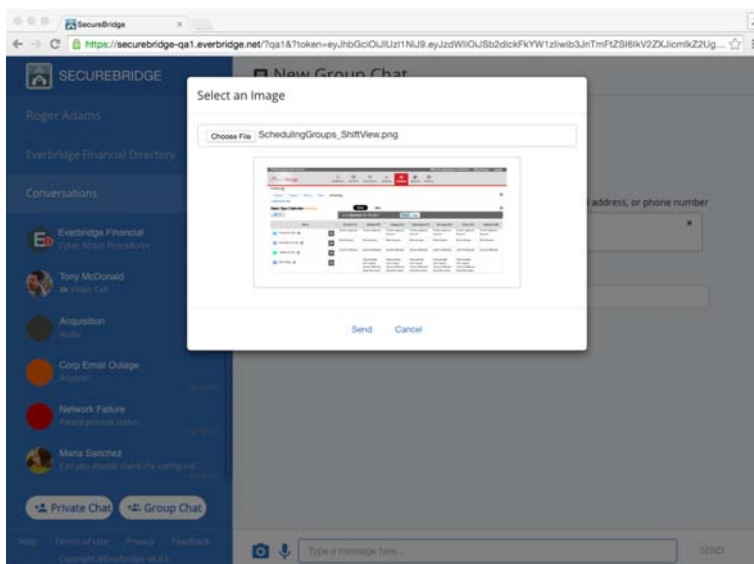
Once you have added at least one user for a secure chat session, there are three (3) types of messages you can send from this screen:



- **Text Message:** Text securely using the text input window at the bottom of the app. Then click Send. When delivered, you see the Day, Date, and Time. The delivery status changes to “Seen” with the Day, Date, and Time when it is read.



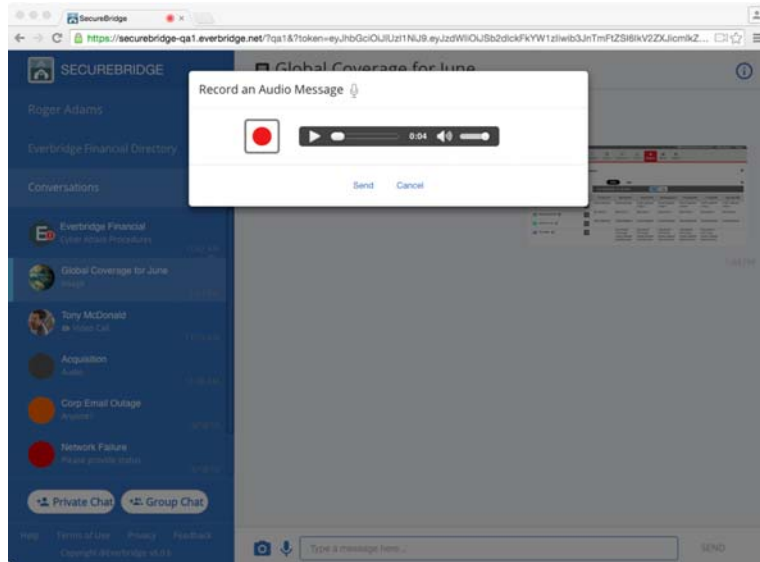
- **Image Message:** Upload images to your computer so you can choose one or more as needed. When delivered, you see the Day, Date, and Time. The delivery status changes to “Seen” with the Day, Date, and Time when it is read.



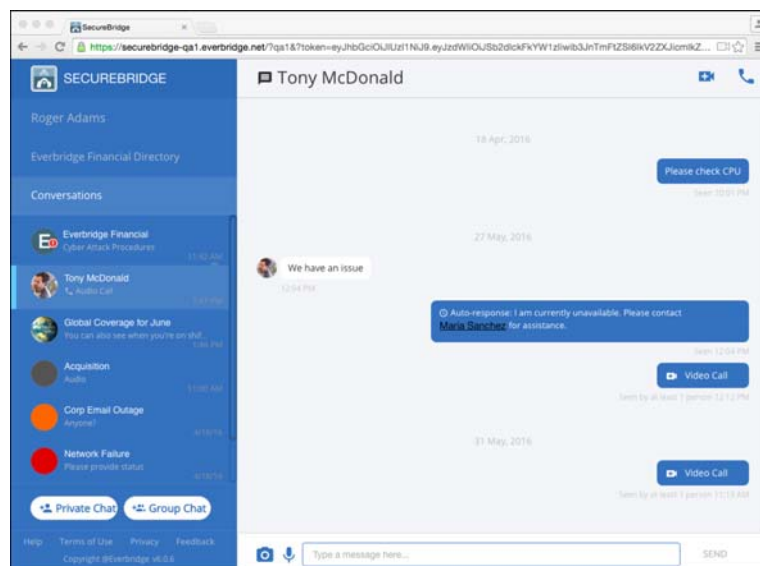
- **Audio Clip (voice recording):** Click the microphone button at the bottom of the page. In the Record an Audio Message dialog, click the red button to record your message, then the black button to stop recording. Preview the message when you



are done recording by clicking the Play button. Click Send. When delivered, you see the Day, Date, and Time. The delivery status changes to “Seen” with the Day, Date, and Time when it is read.



- 3 To send a video call or voice call, go to the group info page for the group (by clicking the Information icon in the upper right). The list of all of the group members are displayed, where you can start a video or audio call with any one of them, individually.
 - **Video Call:** Accessed by clicking the Video icon.
 - **Voice Call:** Accessed by clicking the Phone icon.
- 4 Perform the actions for the type of message you want to send.





Profile

From the left-hand navigation pane, click your name and then click Profile.

The screenshot shows the Everbridge Profile page. The left-hand navigation pane is visible, with 'Profile' selected. The main content area displays the user's profile information:

- Email Address: rogeradams_bankofdreams@everbridge.com
- First Name: Roger
- Last Name: Adams
- Phone: United States, 5555550010

There is a 'Profile Image' section with a placeholder and a 'Choose a new photo' link. A 'Save' button is located below the form fields.

You can:

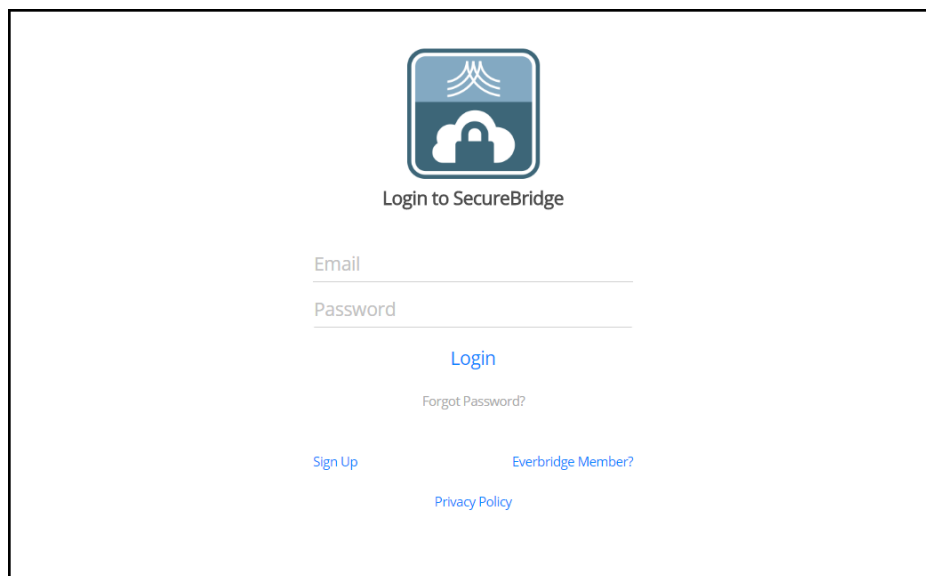
- ◇ Change the First Name
- ◇ Change the Last Name
- ◇ Change the Country for the Phone: United States or United Kingdom
- ◇ Change the Phone Number
- ◇ Choose a new Profile Image (avatar)

Click Save after making updates.



Logout

From the left-hand navigation pane, click your name and then click Logout. You are returned to the login screen.





Administrating Secure Messaging

This chapter provides information about managing your secure messaging functions by means of the Everbridge Suite interface.

The following topics are covered:

- ◇ *Overview of Secure Messaging*
- ◇ *Download Messages*
- ◇ *Secure Messaging User*



Overview of Secure Messaging

Account Administrators and Organization Administrators can see the Secure Messaging list of users, as shown below.

The screenshot shows the Everbridge web interface for an Organization Admin. The top navigation bar includes 'Dashboard', 'Universe', 'Notifications', 'Incidents', 'Contacts' (highlighted), 'Reports', 'Settings', and 'Access'. The 'Contacts' section is active, showing a list of users under the 'Secure Messaging' tab. The list has columns for Status, First Name, Last Name, Phone, Email Address, and Activated On. One user is listed: Rebecca Zhu with phone number +18908765457 and email rebecca1@126.com, activated on 2015-06-29 05:49:03. There are also buttons for 'Download', 'Filter by activity', and 'Invite Users'.

Review the following table for details of each field on this page.

Field Name	Description
Download button	Download a CSV or HTML report.
Filter by activity	If this check box is selected, enter the date range, From and To. Then click the Update View button. These dates are filtered by anyone who sent a message during that time. If this check box is clear, you can search by name (First name and Last name) or email address. The search is case insensitive.
invite Users	Enter an email address to send an invitation to join your organization. Only one user can be invited at a time. Registering as Secure Messaging users does not mean they immediately become contacts. If the users accept the invitation and join the organization, then a contact record is created for them when they join.
Status	Locked or Unlocked. If the account is locked, then this user will no longer be able to use your organization's login credentials to access the Secure Messaging app.
First Name	First Name value. This is the value entered by the user when creating his or her SecureBridge profile and is not pulled from the contact record.
Last Name	Last Name value. This is the value entered by the user when creating his or her SecureBridge profile and is not pulled from the contact record.



Field Name	Description
Phone	Phone Number value. This is the value entered by the user when creating his or her SecureBridge profile and is not pulled from the contact record.
Email Address	Email address value
Activated On	The default sort is by "Activated On", which is the time stamp of when the user first logged into the app. You cannot sort by any other fields. NOTE: When the check box: Filter by activity data range is selected, the dates are filtered on the "Activated On" date. Also, the Search field is disabled.



Download Messages

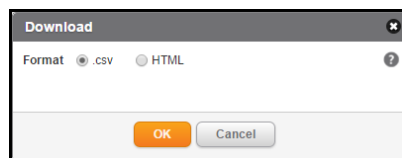
The ability to export the actual content of the messages is optional and can be enabled or disabled by an Everbridge Administrator.

The server retention time can be configured as needed by an Everbridge Administrator. Customers can choose to retain their data from as little as one day and for up to seven years.

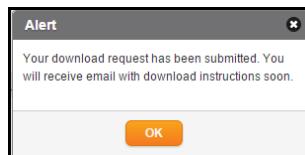
From the main Secure Messaging page or from the Messages sub-tab, you can download statistical information in CSV or HTML format.

To download a statistical Secure Messaging report

- 1 From the main Secure Messaging page, click the Download button. The Download dialog is displayed.



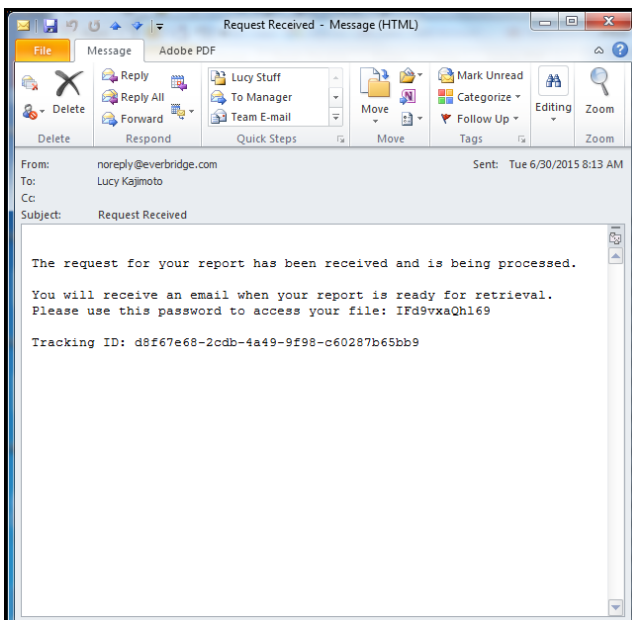
- 2 Select the radio button in which you want the format of your report, and click OK. In this example, HTML is selected. An Alert message is displayed: Your download request has been submitted. You will receive an email with download instructions soon..



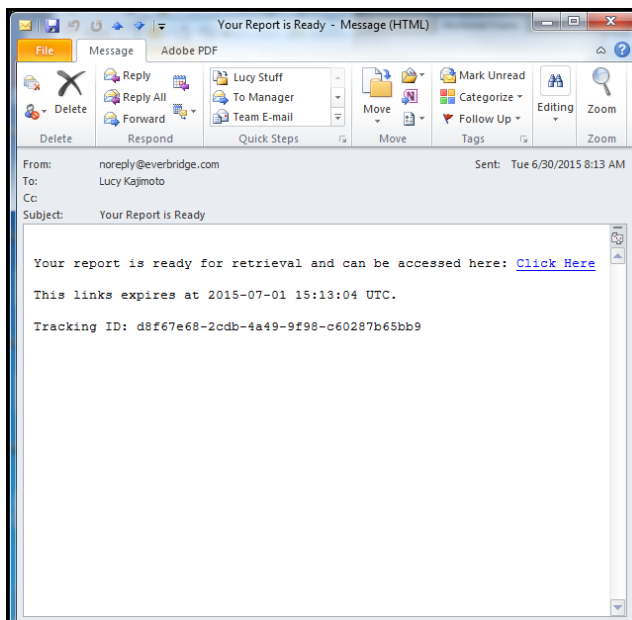
- 3 Click OK and wait for your email.
- 4 Open the Request Received email.



You can expect another email when your report is ready for retrieval. Use the password in the email to access your file.



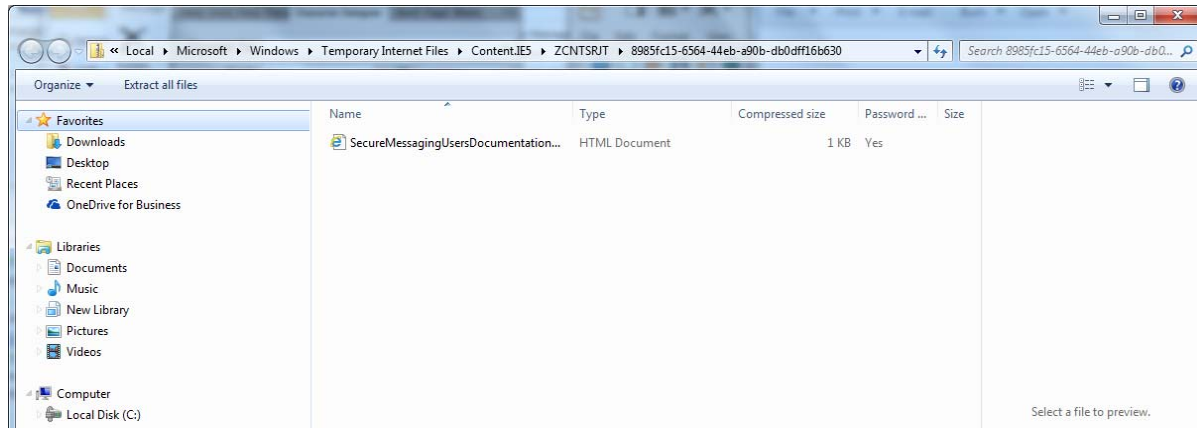
- 5 Open the email named Your Report is Ready.



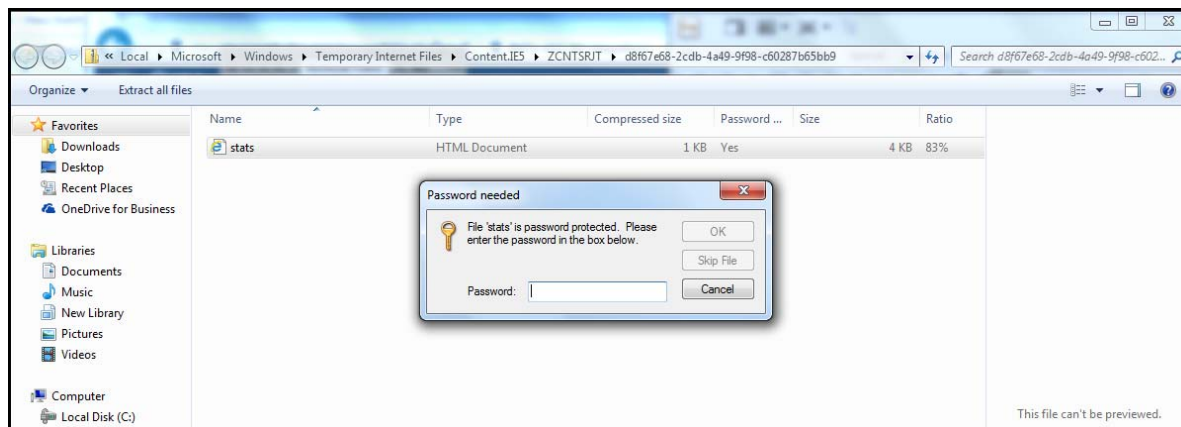
- 6 In the email, select the link: Click Here.



Depending on your browser, you should first select Open (or Save, as the report is not automatically saved). The report file is shown in a Temporary Internet folder.



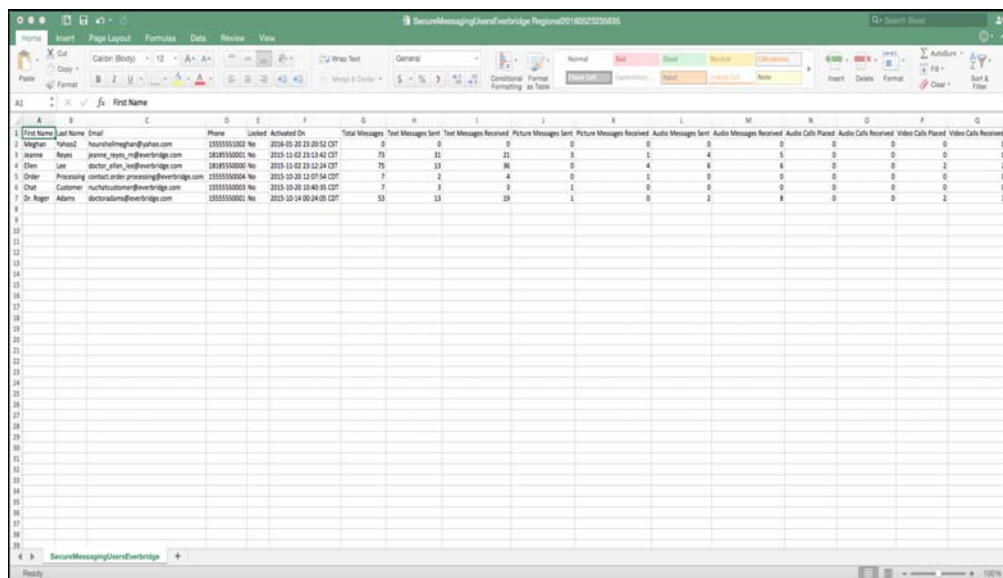
- 7 Double-click the filename to open it.
The Password Needed dialog is displayed.



- 8 Enter the password (from the Request Received email) and click OK.



The report is displayed. The following example is a CSV report.



9 Review the following table for details of each statistical report field.

Report Field Name	Description
File Export Name	SecureMessagingUsers_OrgName_DateAndTimestamp.csv
First Name	First Name value
Last Name	Last Name value
Source (custom-branded apps only)	External or Internal
Email Address	Email address
Phone Number	Phone Number value
Locked	Yes = Locked No = Unlocked
Activated On	Date and Timestamp that the user first logged into the app
Total Messages	Total Number of all message types sent and received by that user
Text Messages Sent	Total Number of all text message types sent by that user
Text Messages Received	Total Number of all text message types received by that user
Picture Messages Sent	Total Number of all picture message types sent by that user
Picture Messages Received	Total Number of all picture message types received by that user
Audio Messages Sent	Total Number of all audio message types sent by that user



Report Field Name	Description
Audio Messages Received	Total Number of all audio message types received by that user
Audio Calls Placed	Total Number of audio calls placed (answered and missed) by that user
Audio Calls Received	Total Number of audio calls received (answered and missed) by that user
Video Calls Placed	Total Number of video calls placed (answered and missed) by that user
Video Calls Received	Total Number of video calls received (answered and missed) by that user

To download a Messages report

- 1 From the main Secure Messaging page, select the link to the name of the person whose messages you want to see.
- 2 Click the Messages sub-tab.
- 3 Click Download.
The Download dialog is displayed.
- 4 Perform steps 2 through 8 of the procedure *To download a statistical Secure Messaging report* on page 78, then return here.



The following are example Messages reports that you can download from the Messages sub-tab:

The screenshot displays a Microsoft Excel spreadsheet titled 'messages' with a data table containing message logs. The table has columns for Sender, Content, Sent At, Delivered, and Read At. A file explorer window is overlaid on the spreadsheet, showing a folder named 'audio' with several MP4 files. The files listed in the explorer are:

- 011b0339-4...55bf2.mp4
- 6d2d2692-...b3637.mp4
- 35a5afa2-9...96996.mp4
- 7644c7a-...5d1e72.mp4
- d94b6a9e-...cce292.mp4
- d933747c-...06ebdf.mp4

The spreadsheet data includes the following rows:

Sender	Content	Sent At	Delivered	Read At
Dr. Roger Adams	Away Message: I am not able to reply right now. Please contact Ellen Lee if an immediate response is needed.	2016-05-23 18:44:13 CDT	Jeanne Reyes: 2016-05-23 18:44:13 CDT	Jeanne Reyes: 2016-05-23 18:44:13 CDT
Jeanne Reyes	Have you examined the pupil movement?	2016-05-23 18:44:13 CDT	Dr. Roger Adams: 2016-05-23 18:44:13 CDT	Dr. Roger Adams: 2016-05-23 18:44:13 CDT
Dr. Roger Adams	image/17bf8abd-cc34-47aa-ad41-d515f431ced4.jpg	2016-05-23 18:43:11 CDT	Jeanne Reyes: 2016-05-23 18:43:33 CDT	Jeanne Reyes: 2016-05-23 18:43:33 CDT
Dr. Roger Adams	audio/35a5afa2-94e7-4448-b715-b9fbd696996.mp4	2016-05-23 18:40:21 CDT	Jeanne Reyes: 2016-05-23 18:43:33 CDT	Jeanne Reyes: 2016-05-23 18:43:33 CDT
Ellen Lee	audio/0f1b0339-4eb3-4698-a8bc-316c99855bf2.mp4	2016-04-11 03:36:24 CDT	Dr. Roger Adams: 2016-04-20 15:02:05 CDT, Jeanne Reyes: 2016-05-23 18:36:46 CDT	Dr. Roger Adams: 2016-04-20 15:02:05 CDT, Jeanne Reyes: 2016-05-23 18:36:46 CDT
Ellen Lee	video/mp4	2016-01-26 12:11:22 CST	Jeanne Reyes: 2016-01-26 12:12:24 CST, Dr. Roger Adams: 2016-01-26 21:34:31 CST	Jeanne Reyes: 2016-01-26 12:12:24 CST, Dr. Roger Adams: 2016-01-26 21:34:31 CST
Ellen Lee	audio/d933747c-8e22-441a-b411-5379f906ebdf.mp4	2015-11-03 06:20:06 CST	Dr. Roger Adams: 2015-11-05 21:35:03 CST, Jeanne Reyes: 2015-11-19 15:29:20 CST	Dr. Roger Adams: 2015-11-05 21:35:03 CST, Jeanne Reyes: 2015-11-19 15:29:20 CST



file:///Users/mhounshell/Downloads/61032d52-c0f9-4332-a0d6-512993e374b2/m...
Everbridge - Contacts messages.html

Jane Jones 04/07/1984

Sender	Content	Sent At	Delivered	Read At
Dr. Roger Adams	I am not able to reply right now. Please contact Ellen Lee if an immediate response is needed.	2016-05-23 18:44:13 CDT	Jeanne Reyes 2016-05-23 18:44:13 CDT	Jeanne Reyes 2016-05-23 18:44:14 CDT
Jeanne Reyes	Have you examined the pupil movement?	2016-05-23 18:44:13 CDT	Dr. Roger Adams 2016-05-23 18:44:13 CDT	Dr. Roger Adams 2016-05-23 18:44:13 CDT
Dr. Roger Adams		2016-05-23 18:43:11 CDT	Jeanne Reyes 2016-05-23 18:43:33 CDT	Jeanne Reyes 2016-05-23 18:43:37 CDT
Dr. Roger Adams		2016-05-23 18:40:21 CDT	Jeanne Reyes 2016-05-23 18:43:33 CDT	Jeanne Reyes 2016-05-23 18:43:37 CDT
Ellen Lee		2016-04-11 03:36:24 CDT	Dr. Roger Adams 2016-04-20 15:02:05 CDT Jeanne Reyes 2016-05-23 18:36:46 CDT	Dr. Roger Adams 2016-04-20 15:02:30 CDT Jeanne Reyes 2016-05-23 18:43:37 CDT
Ellen Lee	video/mp4	2016-01-26 12:11:22 CST	Jeanne Reyes 2016-01-26 12:12:24 CST Dr. Roger Adams 2016-01-26 21:34:31 CST	Jeanne Reyes 2016-01-26 12:12:28 CST Dr. Roger Adams 2016-02-11 00:20:53 CST
Ellen Lee		2015-11-03 06:20:06 CST	Dr. Roger Adams 2015-11-05 21:35:03 CST Jeanne Reyes 2015-11-19 15:29:20 CST	Dr. Roger Adams 2015-11-05 21:35:14 CST Jeanne Reyes 2015-11-19 15:29:26 CST
Jeanne Reyes		2015-11-03 04:35:58 CST	Dr. Roger Adams 2015-11-05 21:35:03 CST Ellen Lee 2015-11-03 04:36:26 CST	Dr. Roger Adams 2015-11-05 21:35:14 CST Ellen Lee 2015-11-03 04:36:29 CST
Ellen Lee		2015-11-03 03:35:10 CST	Dr. Roger Adams 2015-11-05 21:35:03 CST Jeanne Reyes 2015-11-03 04:35:39 CST	Dr. Roger Adams 2015-11-05 21:35:14 CST Jeanne Reyes 2015-11-03 04:35:43 CST
Jeanne Reyes		2015-11-03 03:32:06 CST	Dr. Roger Adams 2015-11-05 21:35:03 CST Ellen Lee 2015-11-03 03:32:33 CST	Dr. Roger Adams 2015-11-05 21:35:14 CST Ellen Lee 2015-11-03 03:32:36 CST
Ellen Lee	Prep OR for possible emergency c-section	2015-11-03 03:30:37 CST	Dr. Roger Adams 2015-11-05 21:35:03 CST Jeanne Reyes 2015-11-03 03:31:44 CST	Dr. Roger Adams 2015-11-05 21:35:14 CST Jeanne Reyes 2015-11-03 03:31:46 CST
Dr. Roger Adams	Ambulance approaching	2015-11-03 03:28:56 CST	Ellen Lee 2015-11-03 03:29:23 CST Jeanne Reyes 2015-11-03 03:31:44 CST	Ellen Lee 2015-11-03 03:29:26 CST Jeanne Reyes 2015-11-03 03:31:46 CST
Jeanne Reyes	Meds and ultrasound ready	2015-11-03 03:28:04 CST	Dr. Roger Adams 2015-11-03 03:28:39 CST Ellen Lee 2015-11-03 03:29:23 CST	Dr. Roger Adams 2015-11-03 03:28:42 CST Ellen Lee 2015-11-03 03:29:26 CST
Ellen Lee	Begin ED Prep	2015-11-03 03:26:28 CST	Dr. Roger Adams 2015-11-03 03:28:39 CST Jeanne Reyes 2015-11-03 03:27:49 CST	Dr. Roger Adams 2015-11-03 03:28:42 CST Jeanne Reyes 2015-11-03 03:27:52 CST
Dr. Roger Adams	EMT monitoring vitals. Ambulance in transit.	2015-11-03 03:25:13 CST	Jeanne Reyes 2015-11-03 03:27:49 CST Ellen Lee 2015-11-03 03:25:53 CST	Jeanne Reyes 2015-11-03 03:27:52 CST Ellen Lee 2015-11-03 03:25:56 CST
Jeanne Reyes	Patient's BP reading 160/110	2015-11-03 03:23:29 CST	Dr. Roger Adams 2015-11-03 03:24:45 CST Ellen Lee 2015-11-03 03:25:53 CST	Dr. Roger Adams 2015-11-03 03:24:48 CST Ellen Lee 2015-11-03 03:25:56 CST
Jeanne Reyes	Patients blood pressure reading 160/110	2015-11-03 03:23:03 CST	Dr. Roger Adams 2015-11-03 03:24:45 CST Ellen Lee 2015-11-03 03:25:53 CST	Dr. Roger Adams 2015-11-03 03:24:48 CST Ellen Lee 2015-11-03 03:25:56 CST
Jeanne Reyes	Monitoring vitals	2015-11-03 03:16:50 CST	Dr. Roger Adams 2015-11-03 03:24:45 CST Ellen Lee 2015-11-03 03:25:53 CST	Dr. Roger Adams 2015-11-03 03:24:48 CST Ellen Lee 2015-11-03 03:25:56 CST



5 Review the following table for details of each Messages report field.

Report Field Name	Description
Sender	The name of the sender.
Content	The message that was sent.
Sent At	The date and time the content was sent.
Delivered	The name of the receiver of the message. Also the date and time of the message was received.
Read At	The name of the person who read the message. Also the date and time the message was read.



Secure Messaging User

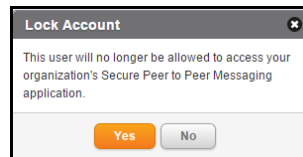
See the example user details. In the following example, the right-hand pane shows the user's Summary.

The screenshot shows the Everbridge admin interface. The top navigation bar includes 'Dashboard', 'Universe', 'Notifications', 'Incidents', 'Contacts' (highlighted), 'Reports', 'Settings', and 'Access'. The 'Contacts' page is active, showing a list of tabs: 'Contacts', 'Uploads', 'Groups', 'Rules', 'Deleted Contacts', 'Scheduling', and 'Secure Messaging'. The user 'Rebecca Zhu' is selected, and the 'Summary' tab is active. The left-hand pane shows user details: 'Rebecca Zhu', 'Email: rebeccahb1@126.com', 'Activated On: 2015-06-29 05:49:03', 'Name: Rebecca Zhu', 'Phone: +18908785457', and an 'Edit' link. The right-hand pane shows a table with the following data:

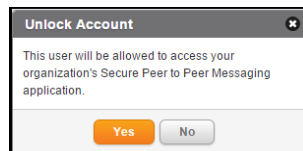
Type	Amount
Total Messages	4
Text Messages Sent	4
Text Messages Received	0
Picture Messages Sent	0
Picture Messages Received	0
Audio Messages Sent	0
Audio Messages Received	0
Audio Calls Placed	0
Audio Calls Received	0
Video Calls Placed	0
Video Calls Received	0

To lock/unlock a user account

- 1 From the left-hand pane of the selected user, select the link: Locked (or Unlock).
 - If locking the account, the Lock Account dialog is displayed.



- If unlocking the account, the Unlock Account dialog is displayed.

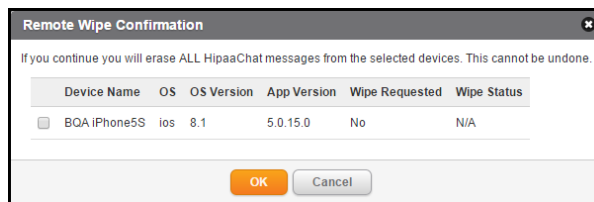


- 2 Click Yes to continue.



To erase all secure messages from selected devices

- 1 From the left-hand pane of the selected user, select the Remote Wipe link. The Remove Wipe Confirmation dialog is displayed.



- 2 Select the check boxes of the devices from which messages will be erased.

NOTE: If one device is being passed between users, then any users that ever used that device will have that device listed in their profiles and that device can be wiped from any previous user's user record. This wipes everyone's data from the device; not just the user who is logged in at the time.

- 3 Click OK.

To edit user information

- 1 From the Secure Messaging page, select the First Name of the user to edit.
- 2 Select the Edit link. The Edit User dialog is displayed.

First Name:

Last Name:

Phone:

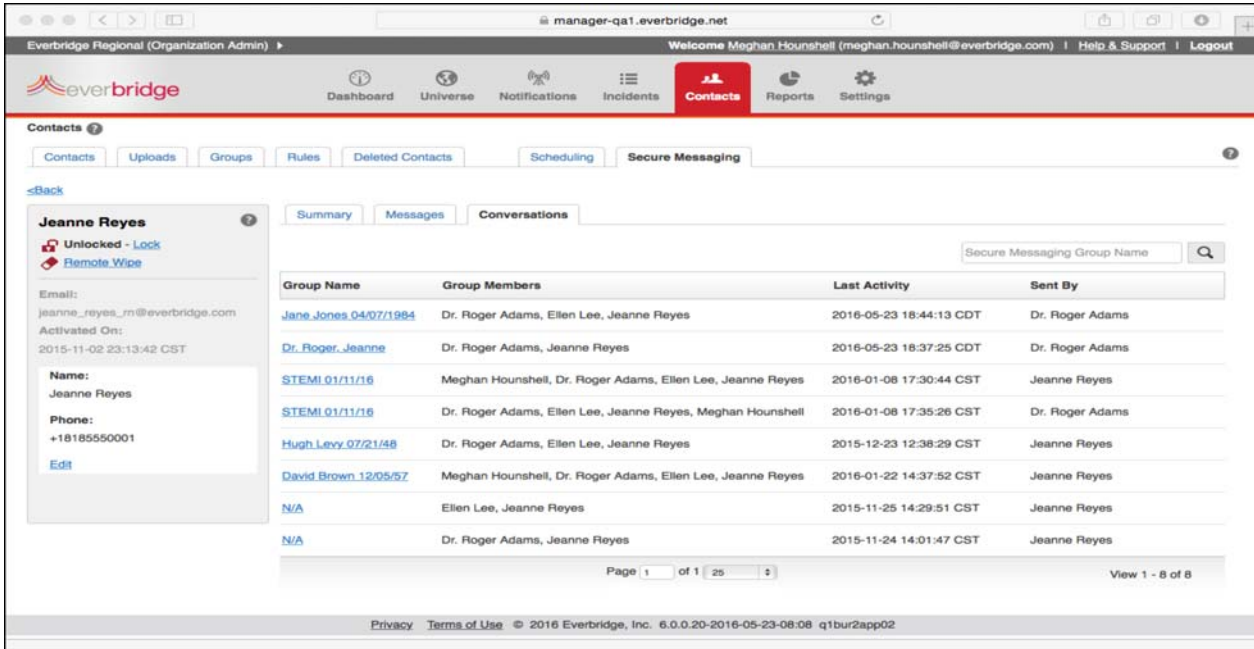
Email:

- 3 Make desired changes to First Name, Last Name, and/or Phone. The changes made here will not be applied to the user's contact record.
- 4 Click OK.

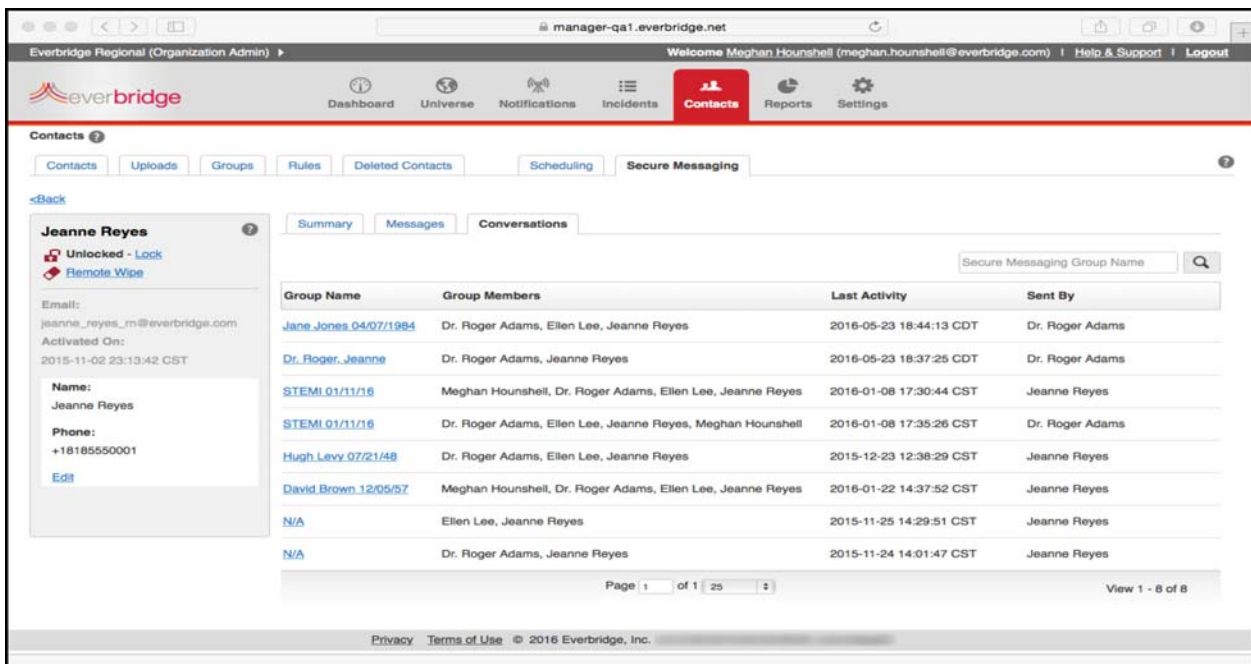


When you click the Messages sub-tab, each line displays the type of messages, by whom the message was sent, the corresponding group name, and the date sent.

The group name that the user sees for private groups in the client is "N/A". If the group is not named (from Group Chat,) then that group is automatically named with the first names of the individuals in that group.



From the Messages sub-tab, click a Group Name to see the details of the conversation. The details open in the Conversations sub-tab.





Click <All (or from the Messages sub-tab, click the Conversations sub-tab) to you see all the conversations.

The screenshot shows the Everbridge interface for an Organization Admin. The top navigation bar includes Dashboard, Universe, Notifications, Incidents, Contacts (highlighted), Reports, Settings, and Access. The main content area is titled 'Contacts' and has sub-tabs for Contacts, Uploads, Groups, Rules, Deleted Contacts, Scheduling, and Secure Messaging. On the left, a contact profile for 'Rebecca1 Zhu' is shown with details like email, activation date, name, and phone number. On the right, the 'Conversations' sub-tab is active, displaying a table of secure messaging groups. The table has columns for Group Name, Group Members, Last Activity, and Send By. Below the table is a pagination control showing 'Page 1 of 1 to' and 'View 1 - 3 of 3'. The footer contains 'Privacy Terms of Use © 2015 Everbridge, Inc. V5.0.0-2015-06-29 18:37:14 q1bur2app01'.

Group Name	Group Members	Last Activity	Send By
Me	Hbtest2 Zhu, Rebecca1 Zhu, Hbtest3 Zhu	2015-06-29 05:53:54	Rebecca1 Zhu
N/A	Hbtest2 Zhu, Rebecca1 Zhu	2015-06-29 05:53:32	Rebecca1 Zhu
N/A	Rebecca1 Zhu, Hbtest3 Zhu	2015-06-29 05:52:33	Rebecca1 Zhu



Troubleshooting SecureBridge

This chapter addresses common challenges when installing or using SecureBridge.

The following topics are covered:

- ◇ *Troubleshooting*



Troubleshooting

Why am I not getting messages?

You probably do not have Push Notifications enabled. Enable Push Notifications on your device (see the instructions in the answer below).

Push Notifications: I did not allow Push Notifications when I first installed SecureBridge. What do I do now?

SecureBridge needs to notify you when you receive a new message. This requires push notifications.

To enable Push Notifications on iOS devices

- 1 From iPhone home screen, tap "Settings".
- 2 Tap "Notifications".
- 3 Scroll down to "SecureBridge" and make sure everything is set to "On" (there are four items here), and that the Alert Style is set to "Banners".

To enable Push Notifications on Android devices

The Android operating system does not contain a "permissions manager" on a per app basis. See Google Play support pages for more information.

Why does SecureBridge need access to my device's Contacts?

This lets you find colleagues by syncing your address book with SecureBridge. Do not worry, all your data is encrypted and kept private. Nobody can see your contacts except you.

Allowing Access to Contacts: I did not allow SecureBridge to Access my Contacts when I first installed it. What do I do now?

To adjust the Contacts access settings on iOS

- 1 From the iOS home screen, tap "Settings".
- 2 Tap "Privacy".
- 3 Tap "Contacts".
- 4 Scroll down to SecureBridge and switch it to "On".

To adjust the Contacts access settings on Android

The Android operating system does not contain a "permissions manager" on a per app basis. See Google Play support pages for more information.

***Video calls aren't connecting. What do I do?***


Your network may have a firewall or some other security setting that is preventing you from utilizing this feature. Contact your assigned internal Point of Contact to report this issue.

What are the minimum device requirements for Video calling?


Video calling requires an iPhone 4S+, iPad 2+, iPad Mini, iPod Touch 5th Generation, or an Android 4.1 device with a camera/video camera available.

Video calling is not supported on older devices like iPhone 4 because the processor "chip" is not fast enough to support it. You may not initiate a video call on an older device, but if someone calls you, understand that the experience will be poor.

How do I update the SecureBridge app?**To update the SecureBridge app on iOS devices**

- 1 From the iOS home screen, tap the  icon.
- 2 In the bottom right, tap the Update icon.

To update the SecureBridge app on Android devices

- 1 From the Android home screen, tap the  > **My Apps** button. Apps with an available update are labeled Update.
- 2 Select the app you want to update and tap the Update button.



Organization Settings

This appendix describes the configuration options available to you in the Everbridge Suite system. The Organization tab is provided for Administrators to configure settings specific to your organization.

The following topics are covered:

- ◇ *Overview of Organization Settings*
- ◇ *Organization*
- ◇ *Map*
- ◇ *Publishing Options*
- ◇ *Notifications*
- ◇ *Contacts and Groups*
- ◇ *Secure Messaging*
- ◇ *Peer-to-Peer Messaging*
- ◇ *Single Sign-On*
- ◇ *Password Reset Policy*



Overview of Organization Settings

The Organization tab is provided for Administrators to configure settings specific to your organization.

The screenshot shows the Everbridge Organization Admin interface. The top navigation bar includes 'Dashboard', 'Universe', 'Notifications', 'Incidents', 'Contacts', 'Reports', 'Settings', and 'Access'. The 'Settings' tab is active. The left sidebar shows 'Organization' selected, with sub-options for 'Base Information', 'Login Message', 'Map', 'Interactive Visibility', 'Publishing Options', 'Notifications', 'Contacts and Groups', 'Secure Messaging', and 'Peer-To-Peer Messaging'. The main content area is titled 'Organization Details' and contains the following information:

Organization Name	Documentation
Organization ID	8800387990194
Organization Status	Active
Country	United States
Contact Data Store Location	uscontact
Account Name	New US SQA Account
Last Modified Date	2016-01-18 09:18:05 PST
Last Modified By	eb admin
Agency Name	Everbridge Suite
Agency Designation	Official Agency

Below the details is an 'Agency Logo/Badge' field with the Everbridge logo. At the bottom, there is a 'Custom Organization ID' field with a 'Save' button.

In the optional Custom Organization ID field, you can enter a maximum of 10 digits. This Organization ID is needed to access certain premium features.



Organization

Base Information

This page provides general information about your Everbridge Suite Organization. You will need to provide some of this information when you report a problem to our Technical Support team.

- ◇ **Organization Name** you selected during your implementation process.
- ◇ **Organization ID** automatically generated by the Everbridge application.
- ◇ **Organization Status** will always display "Active".
- ◇ **Country** is the default country for your organization as defined during your implementation process.
- ◇ **Contact Data Store Location** reflects the Everbridge data store where we store your contact data. There are contact data stores in several locations around the world. Your data is in one suitable for your organization.
- ◇ **Last Modified Date** and **Last Modified By** reflects when and who last modified the configuration of the Organization.
- ◇ **Agency Name** reflects the name of your agency if you are using the Everbridge Community Engagement features.
- ◇ **Agency Designation** reflects your agency designation if you are using the Everbridge Community Engagement features.
- ◇ **Agency Logo/Badge** displays the logo or badge of your agency if you are using the Everbridge Community Engagement features.



The screenshot shows the Everbridge Organization Admin interface. At the top, there is a navigation bar with the Everbridge logo and several menu items: Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings (highlighted in red), and Access. The user is logged in as Lucy Kajimoto. Below the navigation bar, the page title is "Settings" with a help icon. There are three tabs: "Organization" (selected), "Member Portal", and "Everbridge Open". On the left, a sidebar menu lists various settings categories under "Organization": Base Information (selected), Login Message, Map, Interactive Visibility, Publishing Options, Notifications, Contacts and Groups, Secure Messaging, and Peer-To-Peer Messaging. The main content area is titled "Organization Details" and contains a table of information:

Organization Name	Documentation
Organization ID	8800387990194
Organization Status	Active
Country	United States
Contact Data Store Location	uscontact
Account Name	New US SOA Account
Last Modified Date	2016-01-18 09:18:05 PST
Last Modified By	eb admin
Agency Name	Everbridge Suite
Agency Designation	Official Agency

Below the table, there is a section for "Agency Logo/Badge" which displays the Everbridge logo. At the bottom of the details section, there is a "Custom Organization ID" field with a "Save" button.

At the bottom of the page, there is a footer with links for "Privacy" and "Terms of Use", and a copyright notice: "© 2016 Everbridge, Inc."



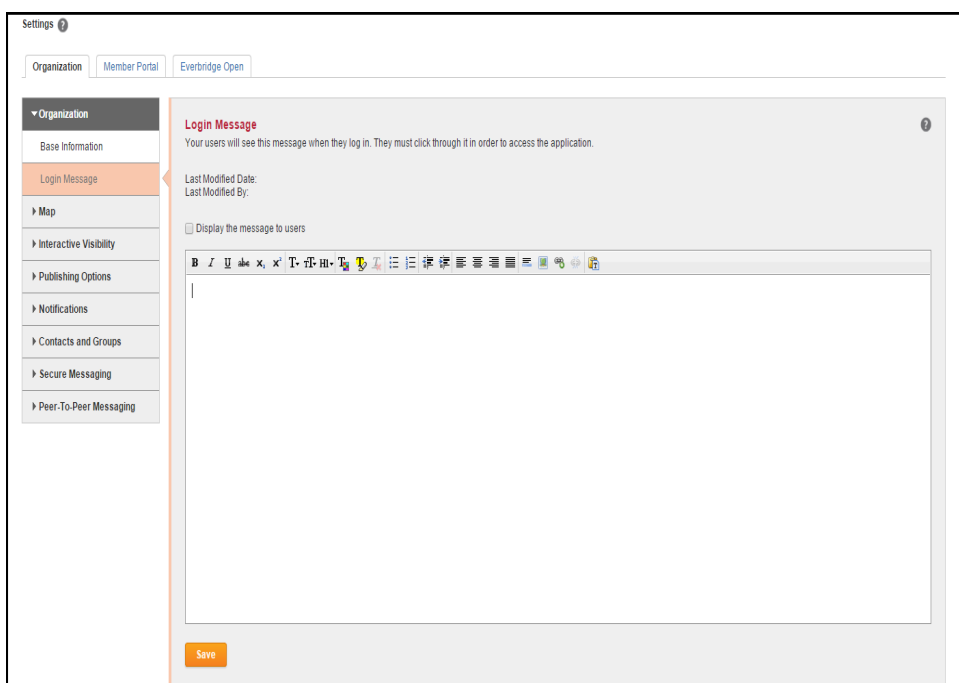
Login Message

This is an optional feature.

The Login Message feature enables you to display a message when your Everbridge Suite users log into the application. For example, you may want to advise your users about the terms and conditions for the use of your Everbridge Organization, or you may want to update your users about an incident or an issue.

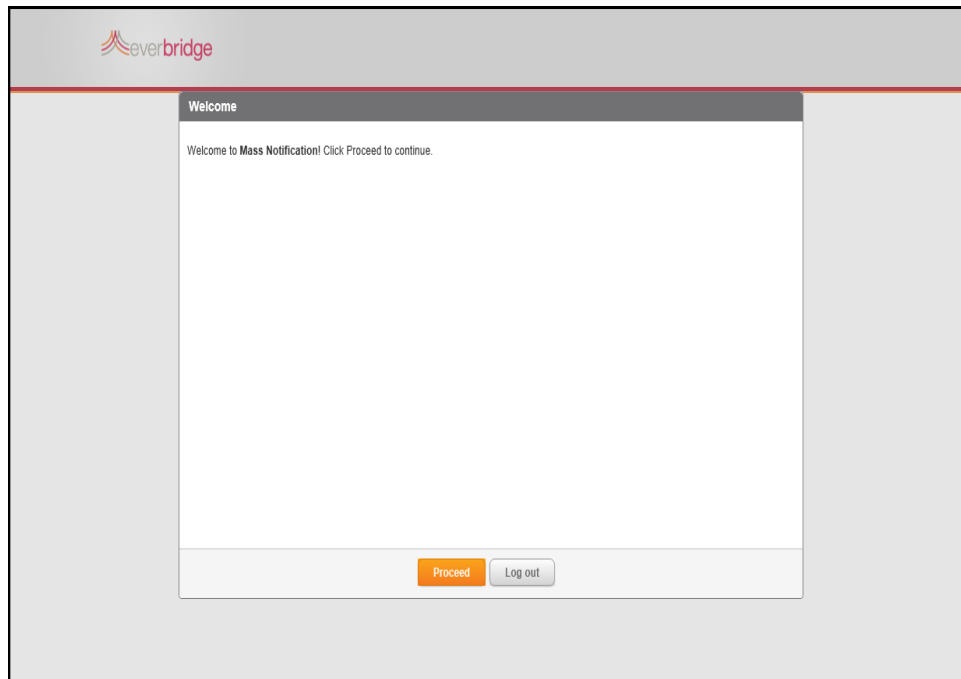
From the Organization tab, select Login Message under Organization. You can enter up to 2,500 characters in the text box and, optionally, apply any desired rich text formatting such as bold text, large fonts, or highlighting.

You can create the message in advance and only display it to your users when you are ready by selecting the check box: Display the message to users. Click Save when you are done.





When your users login to the Everbridge application, they will be required to click through the Login Message page by clicking on the Proceed button.



To change the login message, return to the Login Message page. You can clear the check box: Display the message to users. This message is not shown to users although there is text in the text box. Click Save.

You can edit or delete the message by typing in the text box, then clicking Save.

HTML Messages

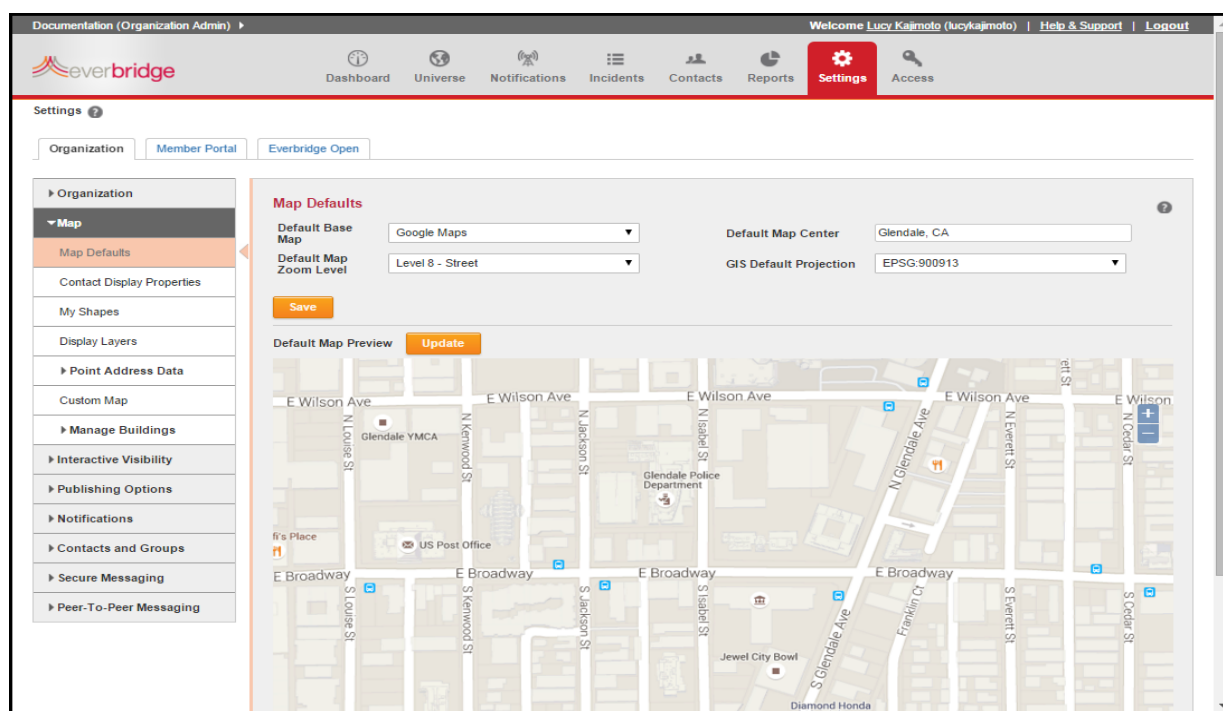
You can use HTML markup in the message, not just plain text. This allows you to control the appearance of the message, as well as include images.

Map

Map Defaults

This is an optional feature.

This page allows you to configure your map defaults for use in the map widget in the Manager Portal.



These defaults include:

- ◇ **Default Base Map** — This is the default base map your users see when they open the map widget in the Manager Portal. Locations and selection shapes are displayed on this map. Your users can change the base map when in the map for their use while in the map widget, but their selection will not change the default for the Organization.
- ◇ **Default Map Zoom Level** — This is the starting resolution level when your users open the map widget. Your users can zoom in or zoom out when they open the map widget.
- ◇ **Default Map Center** — This is the default location on which the application focuses the map when your users open the map widget. Your users can change the focus of the map in the map widget for their notification purposes.



- ◇ **GIS Default Projection** — This is used when processing the locations in your contact CSV file if the location contains Latitude and Longitude values. Select one of the values in the list in order to ensure your contact addresses appear in the correct location on the map.

Click Save after making any changes to your Map settings. Then, click the Universe tab to see the effect of the default settings.

Contact Display Properties

This is an optional feature.

You can set the transparency and size of your contact location icons on the map. Select values that enable your users to distinguish the icons for the various record types and to identify information on the map.

The screenshot displays the Everbridge Settings interface for an Organization Admin. The top navigation bar includes 'Dashboard', 'Universe', 'Notifications', 'Incidents', 'Contacts', 'Reports', 'Settings' (highlighted), and 'Access'. The 'Settings' page has tabs for 'Organization', 'Member Portal', and 'Everbridge Open'. A left sidebar lists various settings categories, with 'Map' expanded to show 'Map Defaults' and 'Contact Display Properties' (selected). The 'Contact Display Properties' section features a blue information banner: 'Changes here may cause your contacts to display slowly the first time viewing them on a map.' Below this, there are controls for 'Transparency' (set to 70%) and 'Size' (set to 7px). A list of location levels is shown, each with a size dropdown set to 7px: Level 1 – World, Level 2 – Country, Level 3 – State, Level 4 – County, Level 5 – City, Level 6 – Town, Level 7 – Neighborhood, Level 8 – Street, and Level 9 – Max Level. A 'Save' button is at the bottom left. To the right, a 'Preview Settings on Google Map (Sample contacts)' shows a map of the United States with red location markers.

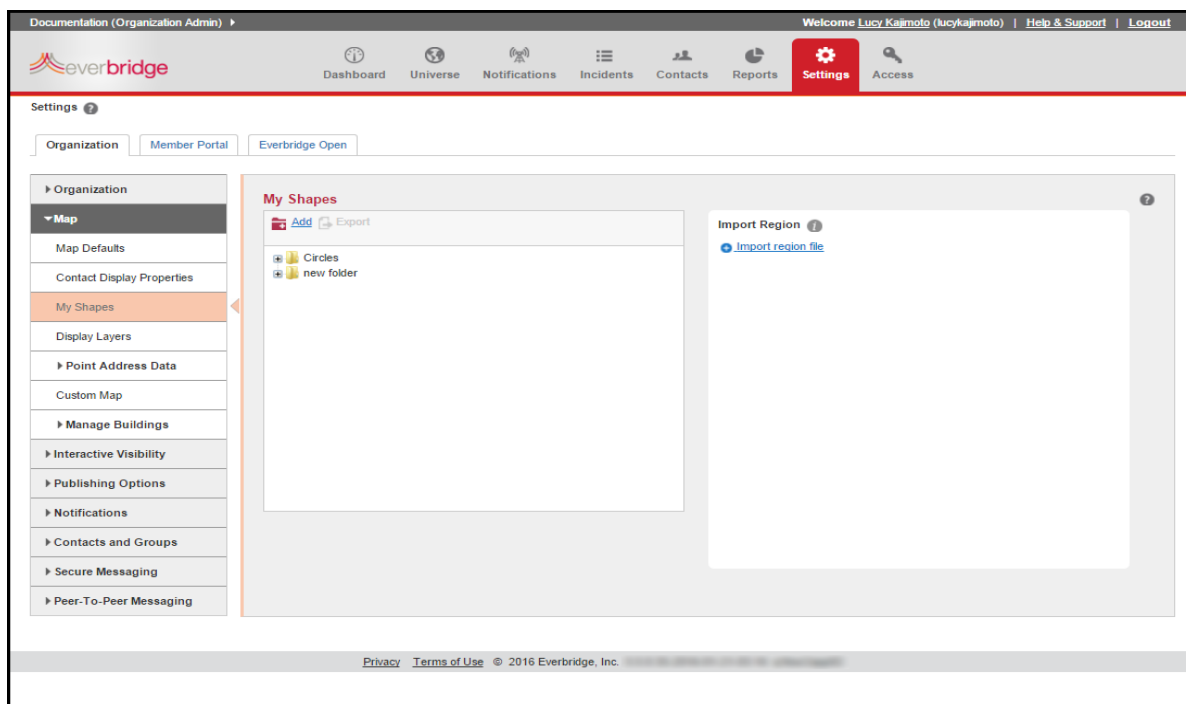


My Shapes

This is an optional feature.

Upload pre-defined polygons your users can load to select contacts from the map for a notification. This step could eliminate the need for your users to draw commonly used polygons before preparing the notification

.Go to Settings > Map > My Shapes.



Requirements

- ◇ The file must contain only closed, single-loop polygons:
- ◇ The file can contain multiple polygons, which you will be able to load/hide separately on the map.
- ◇ Shapes must be in WGS84 coordinate system (also known as *projection*).
- ◇ Do not include point or line shapes since these cannot be used to select contacts from the map.
- ◇ Do not load polygons with holes (for example, donut shapes).
- ◇ Do not load multi-part polygons.



Importing Regions Into the My Shape Library

Import Region—You can upload files using one of the following formats:

- ◇ A KML (Keyhole Markup Language) file, which must not be compressed. The maximum file size is 100 MB.
- ◇ A compressed Shape file. Do not include nested folders in the compressed file (zip file). In other words, the zip file can only contain the shapes. The maximum file size is 100 MB.

To import a region

- 1 From the Settings tab, select Map > My Shapes.
- 2 Click the link: Import region file.
- 3 In the Region Name, enter the shape name as it should appear to users in the map widget.
- 4 Select a folder for the file, if available.
- 5 Click Upload to portal.

NOTE: You can add folders before uploading shapes, or you can later move loaded shapes between folders or into a folder.

Managing Folders and Shapes in My Shapes

Use the following procedures to manage folders and shapes in My Shapes.

To add a folder

- 1 From the Settings tab, select Map > My Shapes.
- 2 Click the link: Add, located at the top of the pane.
The application displays a folder at the bottom of the folder list with the default name *new folder*.
- 3 Enter the desired folder name (maximum 80 characters, including spaces).
- 4 Either press ENTER on the keyboard or click the mouse in a different area of the page to accept the change.

To rename a folder

- 1 From the Settings tab, select Map > My Shapes.
- 2 Select the desired folder name to display the edit icons.
- 3 Select the Pencil icon to enable the folder name field.
- 4 Click in the Name field and edit the folder name.
- 5 Either press ENTER on the keyboard or click the mouse in a different area of the page to accept the change.



To delete a folder

- 1 From the Settings tab, select Map > My Shapes.
- 2 Select the desired folder name to display the edit icons.
- 3 Select the Trash Bin icon.
The application prompts you to confirm the deletion of the folder.
- 4 Click OK to delete the folder.

CAUTION: If you delete a folder that contains shapes, then the application also deletes the shapes. Move the shapes to another folder if you want to keep the shapes.

To move shapes between folders

- 1 From the Settings tab, select Map > My Shapes.
- 2 Expand the folder containing the desired shape.
- 3 Select the desired shape by clicking and holding down the left mouse button.
- 4 Drag the shape to the desired folder and release the left mouse button.

To move shapes into a folder

- 1 From the Settings tab, select Map > My Shapes.
- 2 Select the desired shape by clicking and holding down the left mouse button.
- 3 Drag the shape to the desired folder and release the left mouse button.

To export a shape

- 1 From the Settings tab, select Map > My Shapes.
- 2 Locate and select the desired shape.
- 3 Click Export (next to the Add link).
- 4 Follow your browser's instructions for storing the shape on your local resource.

NOTE: The export file is in Shapefile format.

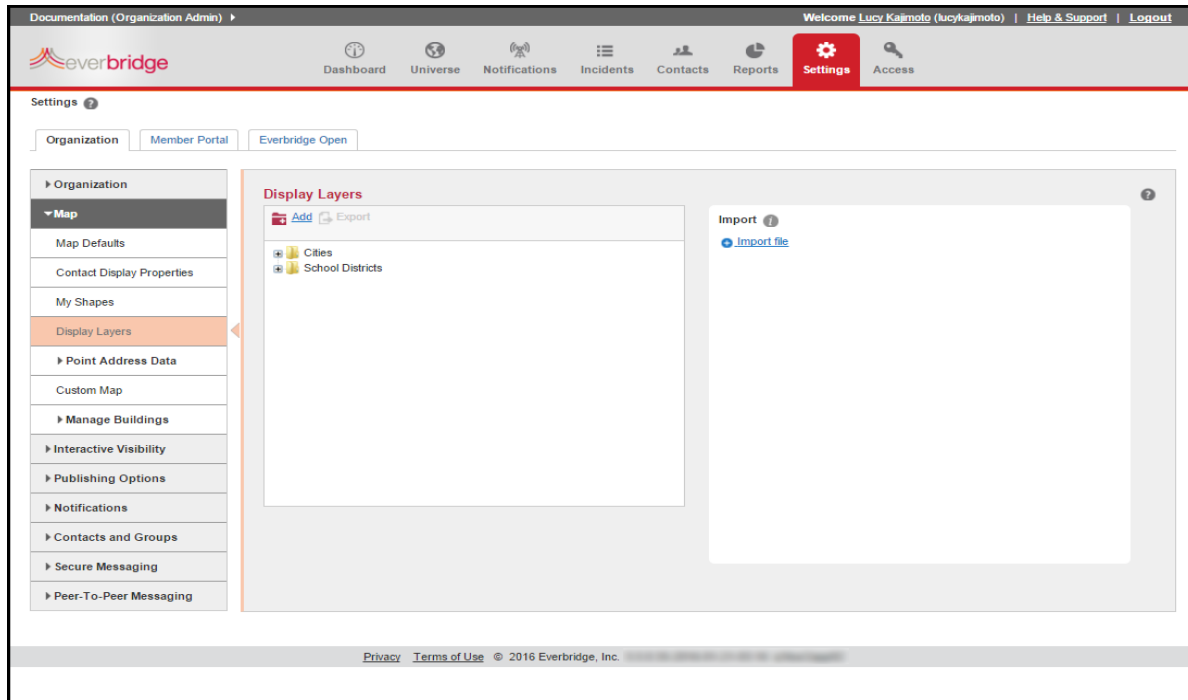
Display Layers

This is an optional feature.

You can upload any shape (polygons, points, or lines) for your users to overlay on the map as a reference. For example, your Display Layer could be county or city boundaries (lines), school district buildings (points), or even school buildings (closed polygons). Shapes loaded



into the Display Layers library cannot be used to select contacts from the map for a notification. This feature currently does not support multi-part polygons. Your file can contain multiple shapes that you will be able to load/hide separately on the map.



From the Organization tab, under Map > Display Layers, you can:

- ◇ Add display layers. The maximum file size is 100 MB.
- ◇ Import the shape files in a compressed file (zip format). If you upload shapes to Display Layers, ensure there are only shapes, and not nested folders, contained in the compressed file (zip file). In other words, the zip file can only contain the shapes. The maximum file size is 100 MB.

The process to manage uploads and process these shapes is the same as the process described above for *My Shapes* on page 103.

Point Address Data

This is a premium feature.

This feature is designed to enable you to achieve the level of precision you need for your notifications. An administrator can load a master list of reference addresses and geo? points, and can manage the master list online.

In order to use this feature, load a list of addresses and a latitude/longitude pair of each address. The Everbridge application can use this custom data to geo?code an address added to a contact record via the REST API, the Manager Portal, or the Member Portal.



Geo-Coding

The Everbridge application will use the Point Address data to geo-code your contact addresses in the CSV file and the Member Portal.

When geo-coding contact addresses in the contact CSV file, the Everbridge geo-coding application will assign the Latitude/Longitude to the address in the contact record only if there is a PERFECT match for the fields indicated below. The match is based on the content and not the letter case of the content. For example, "Glendale" and "GLENDALE" are the same value and is a perfect match.

Example 1. Successful Geo-Coding

Contact Address Field		Point Address Data Field
Street Address	MUST MATCH	Street Address X
City	MUST MATCH	City X
State	MUST MATCH	State X
Postal Code	MUST MATCH	Postal Code X

Example 2. Successful Geo-Coding

Contact Address Field	Sample Value	Sample Value	Point Address Data Field
Street Address	500 North Brand Blvd	500 NORTH BRAND BLVD	Street Address X
City	Glendale	Glendale	City X
State	CA	CA	State X
Postal Code	91203	91203	Postal Code X

Example 3. Failed Geo-Coding

Contact Address Field	Sample Value	Sample Value	Point Address Data Field
Street Address	500 N. Brand Blvd	500 North Brand Blvd	Street Address X
City	Glendale	Glendale	City X
State	CA	CA	State X
Postal Code	91203	91203	Postal Code X

Example 4. Failed Geo-Coding

Contact Address Field	Sample Value	Sample Value	Point Address Data Field
Street Address	500 North Brand Blvd	500 North Brand Blvd	Street Address X
City	Glendale	Glendale	City X
State	CA	CA	State X
Postal Code	(empty)	91203	Postal Code X



Published

After you load the master list of geo-coded address records via the Point Address Data > Uploads page, you must publish the list in order for the Everbridge application to use these addresses.

You can upload a file containing your master list of addresses, or you can manually add the addresses to your master list.

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Point Address Data: Published Geo-Coding Application Everbridge Service

Delete Download Add Address Search >Advanced Search Reset

	Record ID	Country	Street Address	Apt/Suite/Unit	City	State/Province	Postal Code	
<input type="checkbox"/>	4822626	United States	425 West Prospect Road		Fort Collins	CO	80526	View on map
<input type="checkbox"/>	4822627	United States	426 West Prospect Road		Fort Collins	CO	80526	View on map
<input type="checkbox"/>	4822628	United States	427 West Prospect Road		Fort Collins	CO	80526	View on map
<input type="checkbox"/>	4822629	United States	428 West Prospect Road		Fort Collins	CO	80526	View on map
<input type="checkbox"/>	4822630	United States	429 West Prospect Road		Fort Collins	CO	80526	View on map
<input type="checkbox"/>	4822631	United States	430 West Prospect Road		Fort Collins	CO	80526	View on map
<input type="checkbox"/>	4822632	United States	431 West Prospect Road		Fort Collins	CO	80526	View on map
<input type="checkbox"/>	4822633	United States	432 West Prospect Road		Fort Collins	CO	80526	View on map
<input type="checkbox"/>	4822634	United States	433 West Prospect Road		Fort Collins	CO	80526	View on map
<input type="checkbox"/>	4822635	United States	434 West Prospect Road		Fort Collins	CO	80526	View on map

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You can perform the following tasks on this page:

- ◇ View your current master list of addresses
- ◇ Add an address record
- ◇ Edit an address record
- ◇ Delete an address or selection of addresses
- ◇ View the address location on the map using the geo-point in the address record
- ◇ Search for an address record or group of address records
- ◇ Set the geo-coding service: Everbridge Service; My Point Address Info; and My Point Address Info and Everbridge Service. The latter option uses My Point Address Info, but if an address in the contact upload cannot be geo-coded, the application uses the Everbridge Service.



To add an address record

You can add an unlimited number of addresses to your Organization's master list of addresses. However, Everbridge recommends you also insert the address record to your system of record to ensure your next upload does not overwrite your changes.

- 1 Click Add Address.

Add/Edit Point Address Information

*Record ID !

*Country

*Street Address

Apt/Suite/Unit

*City

*State/Province

*Postal Code

Update Lat/Long then click Preview to see new pin location.

*Latitude

*Longitude

- 2 Populate the required fields.
- 3 Preview the location on the map.
- 4 Select Save to close the overlay and save the address to the master list.

To edit an address record

You can edit any address record in your Organization's master list of addresses. However, Everbridge recommends you also make the same changes to the address record in your system of record to ensure your next upload does not overwrite your changes.

- 1 Click the Pencil icon for the desired address.
- 2 Modify the address record.
- 3 Preview the location on the map, if necessary.

NOTE: The Preview button refreshes the location of an address only if you have changed the Latitude and/or Longitude fields.

- 4 Select Save to close the overlay and save the changes to the address record.



To delete one or more address records

You can delete addresses from your Organization's master list of addresses. However, Everbridge recommends you also remove the desired address records from your system of record to ensure your next upload does not overwrite your changes.

- 1 Select the check box for the address record(s).
- 2 Click Delete.
- 3 Confirm the request to delete the record(s).

To view an address location on the map

- 1 Select View on Map link for the desired address.
- 2 Review the address details and the address location on the map.
- 3 Close the overlay.

To search for an address using the quick search field

- 1 Enter the desired search string in the Search field.
- 2 Select the Search icon.
The application will search the Street Address, City, and Postal Code fields for address records that contain the search string in any of those fields

To search for addresses using the Advance Search feature

- 1 Select the Advance Search link.
- 2 Select the desired fields to search and the search criteria for each field.
- 3 Click Search.

To set the geo-coding service

If you load non-geo-coded addresses into contact records or collect contact information via the Member Portal, the Everbridge application can use one of two services for geo-coding addresses:

- ◇ Set to "Everbridge Service" if you want Everbridge to use its commercial geo-coding API service.
- ◇ Set to "My Point Address Info" if you want Everbridge to use your Published data for geo-coding addresses; this application uses an exact match rule for geo-coding addresses. In other words, every component (Street Address, City, State, and Postal Code) of the address submitted via the API, Manager Portal, and Member Portal will be compared to the corresponding address component in your Point Address data. The submitted address will be geo-coded (the application assigns the Latitude and Longitude to the address) if every component is an exact match. You can optionally select to use the Everbridge Service if an address in the contact upload cannot be geo-coded using Point Address data.



Uploads

You can upload your master list of Point Addresses by means of a CSV file. You can download the template from this page that contains the required column headers for your file.

The screenshot shows the 'Point Address Data: Uploads' section in the Everbridge settings. It includes a table with the following data:

File Name	Batch ID	Upload Status	Status	Uploaded on	Received	Loaded
Point_Address_Data_LK1.csv	466197225144464	Completed	Published	2016-01-24 18:09:57 PST	81	81
Point_Address_Data_LK1.csv	466197225144396	Completed	Unpublished	2015-06-05 13:45:26 PDT	81	81

Upload Data Elements

The following table provides details about the column headings, from left to right, in the PointAddressData-Template.csv file. The column headings must not be changed! If you use your own spreadsheet, then ensure your column headings use the exact case-sensitive spelling and spaces.

This feature is designed to enable you to achieve the level of precision you need for your notifications. The Everbridge application will not verify the address records that you submit are actual address locations. Since you define the Latitude and Longitude for an address, you can determine the precision of the geo-point and the actual location of the geo-point.



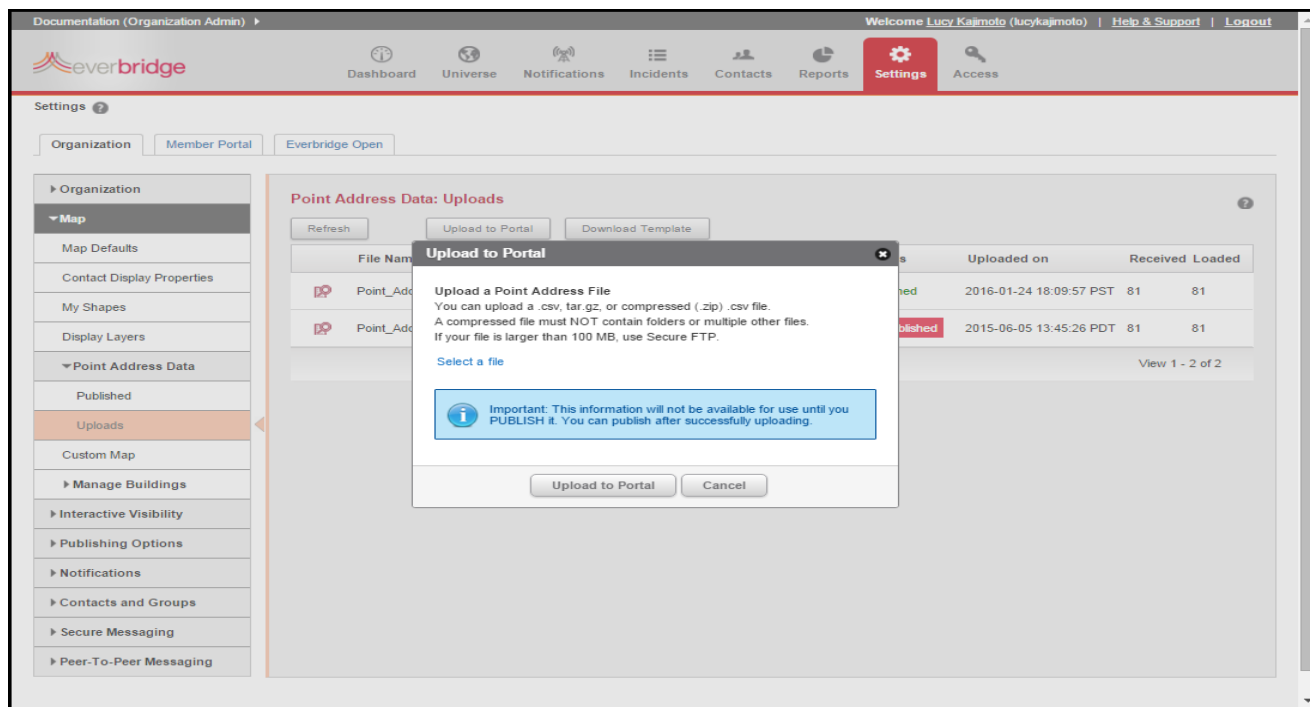
Field	Required	Comments
Address Record ID	Y	Client-defined unique identifier for the address record. Maximum Length: 50 Data Type: String Cell cannot be empty Value must be unique in file NOTE: If two records have the same Address Record ID, then the first record in the CSV file is loaded to the database. The second record is not loaded to the database and is listed in the Errors tab.
Street Address	Y	Includes building number, predirectional, street name, street type, and post directional Maximum Length: 100 Data Type: String Cell cannot be empty
Apt/Suite/Unit	N	Apartment, Suite, Unit, Floor, and so on Maximum Length: 10 Data Type: String
City	Y	City name Maximum Length: 40 Data Type: String For US addresses, jurisdiction name below county level Cell cannot be empty
State/Province	Y	Administrative level below county level Maximum Length: 40 Data Type: String For US addresses, Everbridge recommends full State name, e.g., "California" Cell cannot be empty
Postal Code	Y	For US Addresses, ZIP Code or ZIP Code + 4 Maximum Length: 10 Data Type: String Cell cannot be empty Length 99999 or 99999-9999 or 999999999 if Country is "United States"
Country	Y	Full ISO country name Maximum Length: 40 Data Type: String Cell cannot be empty Country name is in the ISO country list



Field	Required	Comments
Longitude	Y	Longitude value, including negative sign Data Type: Precision Not validated for client jurisdiction Cell cannot be empty Minimum Value: -180.000000000 Maximum Value: 180.000000000 Recommend Spherical Mercator projection
Latitude	Y	Latitude value Data Type: Precision Not validated for client jurisdiction Cell cannot be empty Minimum Value: -90.000000000 Maximum Value: 90.000000000 Recommend Spherical Mercator projection

Uploading a CSV File

Select the Upload to Portal button. The application displays the following:





Click the link: Select a file. Then, select the desired CSV file and click Upload to Portal button at the bottom of the overlay.

The screenshot shows the Everbridge Settings page for Organization Admin. The 'Settings' menu is open, and the 'Point Address Data: Uploads' section is selected. A dialog box titled 'Upload to Portal' is displayed, providing instructions for uploading a Point Address File. The dialog includes a 'Select a file' section with a file named '1: Point_Address_Data_LK1.csv' selected. Below the file selection, there is an important note: 'Important: This information will not be available for use until you PUBLISH it. You can publish after successfully uploading.' The dialog has 'Upload to Portal' and 'Cancel' buttons. In the background, a table of uploads is visible with columns for File Name, Uploaded on, Received, and Loaded.

File Name	Uploaded on	Received	Loaded
Point_Ad...	2016-01-24 18:09:57 PST	81	81
Point_Ad...	2015-06-05 13:45:26 PDT	81	81

Your upload is displayed on the Point Address Data: Uploads page. The application displays the following information for each upload:

- ◇ File Name (as submitted by the user)
- ◇ Batch ID (system-generated)
- ◇ Upload Status (In-Progress, Completed, or Failed)
- ◇ Status (Published or Unpublished)
- ◇ Uploaded on (date/time)
- ◇ Received (number of rows)
- ◇ Loaded (number of rows)



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 - Peer-To-Peer Messaging

Point Address Data: Uploads

Refresh Upload to Portal Download Template

File Name	Batch ID	Upload Status	Status	Uploaded on	Received	Loaded
Point_Address_Data_LK1.csv	466197225144465	In Progress	Unpublished	2016-01-24 18:18:25 PST	0	0
Point_Address_Data_LK1.csv	466197225144464	Completed	Published	2016-01-24 18:09:57 PST	81	81
Point_Address_Data_LK1.csv	466197225144396	Completed	Unpublished	2015-06-05 13:45:26 PDT	81	81

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Click Refresh to update the status.

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Point Address Data: Uploads

Refresh Upload to Portal Download Template

File Name	Batch ID	Upload Status	Status	Uploaded on	Received	Loaded
Point_Address_Data_LK1.csv	466197225144465	Completed	Unpublished	2016-01-24 18:18:25 PST	81	81
Point_Address_Data_LK1.csv	466197225144464	Completed	Published	2016-01-24 18:09:57 PST	81	81
Point_Address_Data_LK1.csv	466197225144396	Completed	Unpublished	2015-06-05 13:45:26 PDT	81	81

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NOTE: This information will not be available for use until you PUBLISH it. You can publish after successfully uploading. To publish, see the procedure *To view the Point Address Data: Uploads Details*, next.

To view the Point Address Data: Uploads Details

- 1 From the Point Address Data: Uploads page, click the Details icon.

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Secure Messaging

Peer-To-Peer Messaging

Point Address Data: Uploads Details
Point_Address_Data_LK1.csv

Unpublished Publish

You must Publish these addresses to use them. Only valid addresses will be Published.

Valid(81) Errors(0)

Upload Status: Completed
Total Records: 81
Publish Date:
Upload Date: 2016-01-24 18:09:57 PST
Uploaded By: Lucy Kajimoto

Record ID	Country	Street Address	Apt/Suite/Unit	City	State/Province	Postal Code
4822626	United States	425 West Prospect Road		Fort Collins	CO	80526
4822627	United States	426 West Prospect Road		Fort Collins	CO	80526
4822628	United States	427 West Prospect Road		Fort Collins	CO	80526
4822629	United States	428 West Prospect Road		Fort Collins	CO	80526
4822630	United States	429 West Prospect Road		Fort Collins	CO	80526
4822631	United States	430 West Prospect Road		Fort Collins	CO	80526
4822632	United States	431 West Prospect Road		Fort Collins	CO	80526
4822633	United States	432 West Prospect Road		Fort Collins	CO	80526
4822634	United States	433 West Prospect Road		Fort Collins	CO	80526
4822635	United States	434 West Prospect Road		Fort Collins	CO	80526

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- 1 The application lists the upload results in one of two sub-tabs on the page:
 - The "Valid(#)" tab displays a list of the records that passed all data validations tests.
 - The "Errors(#)" tab displays a list of the records that failed one or more validation tests. You can correct the data values that caused the errors before publishing the upload, or you can correct the data errors in your upload file and upload the corrected file.



To use the valid addresses in your master list for geo-coding contact addresses

- 1 Click Publish.
The confirmation dialog is displayed.
- 2 Click Yes.
Only valid addresses will be published. The "Published" button for the upload is replaced by a "Re-Publish" button.

The screenshot shows the Everbridge Settings page for an Organization Admin. The main content area is titled "Point Address Data: Uploads Details" and shows the upload status for "Point_Address_Data_LK1.csv". The status is "Completed" with 81 total records. The upload date is 2016-01-24 18:09:57 PST, and it was uploaded by Lucy Kajimoto. A green "Published" button is visible, and a note states "Only valid addresses can be re-published". Below this, a table lists 81 valid addresses, all from the United States, with street addresses ranging from 425 West Prospect Road to 434 West Prospect Road, all in Fort Collins, CO, with postal code 80526. The navigation pane on the left shows the "Uploads" option under "Point Address Data" selected.

Record ID	Country	Street Address	Apt/Suite/Unit	City	State/Province	Postal Code
4822626	United States	425 West Prospect Road		Fort Collins	CO	80526
4822627	United States	426 West Prospect Road		Fort Collins	CO	80526
4822628	United States	427 West Prospect Road		Fort Collins	CO	80526
4822629	United States	428 West Prospect Road		Fort Collins	CO	80526
4822630	United States	429 West Prospect Road		Fort Collins	CO	80526
4822631	United States	430 West Prospect Road		Fort Collins	CO	80526
4822632	United States	431 West Prospect Road		Fort Collins	CO	80526
4822633	United States	432 West Prospect Road		Fort Collins	CO	80526
4822634	United States	433 West Prospect Road		Fort Collins	CO	80526
4822635	United States	434 West Prospect Road		Fort Collins	CO	80526

- 3 Return to the Point Address Data: Uploads page by clicking Uploads from the navigation pane.



Note the Status is "Published". Once published, you can Re-Publish as needed.

The screenshot shows the Everbridge Organization Admin interface. The top navigation bar includes 'Dashboard', 'Universe', 'Notifications', 'Incidents', 'Contacts', 'Reports', 'Settings', and 'Access'. The 'Settings' menu is expanded, showing options like 'Organization', 'Member Portal', and 'Everbridge Open'. The left sidebar lists various settings categories, with 'Point Address Data' expanded to show 'Published' and 'Uploads'. The 'Uploads' section displays a table of data uploads.

File Name	Batch ID	Upload Status	Status	Uploaded on	Received	Loaded
Point_Address_Data_LK1.csv	466197225144465	Completed	Published	2016-01-24 18:18:25 PST	81	81
Point_Address_Data_LK1.csv	466197225144464	Completed	Published	2016-01-24 18:09:57 PST	81	81
Point_Address_Data_LK1.csv	466197225144396	Completed	Unpublished	2015-06-05 13:45:26 PDT	81	81

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Custom Map

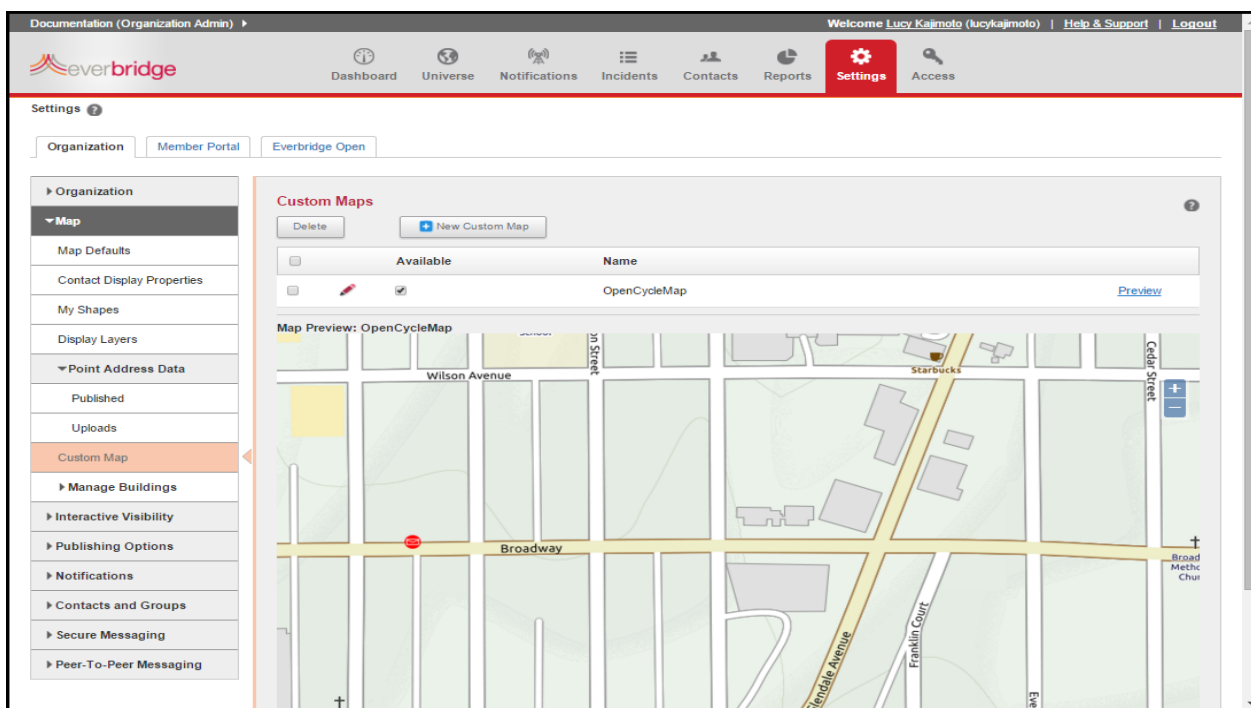
This is an optional feature.

You can use a map from a remote base map server as one of the base map options available to your users in addition to the base maps provided by Everbridge.

The following are the system requirements for Custom Maps:

- ◇ Base map (no active layers and no map services)
- ◇ Of type XYZ or ArcGIS (ESRI ArcGIS Server 9.3 or newer)
- ◇ Compatible with OpenLayers 2.0 framework
- ◇ Accessible to the public via the Internet
- ◇ Does not require username and password
- ◇ Spherical Mercator projection to ensure map and contacts align in the map widget

NOTE: Your custom map must be a base map implemented using Spherical Mercator (EPSG:900913) projection in order for the contact layers and shapes to be displayed correctly; not a layer or layers on top of a base map. If you want to use "layers", then load these into the Display Layers library. For details, see *Display Layers* on page 105.





To add a custom map

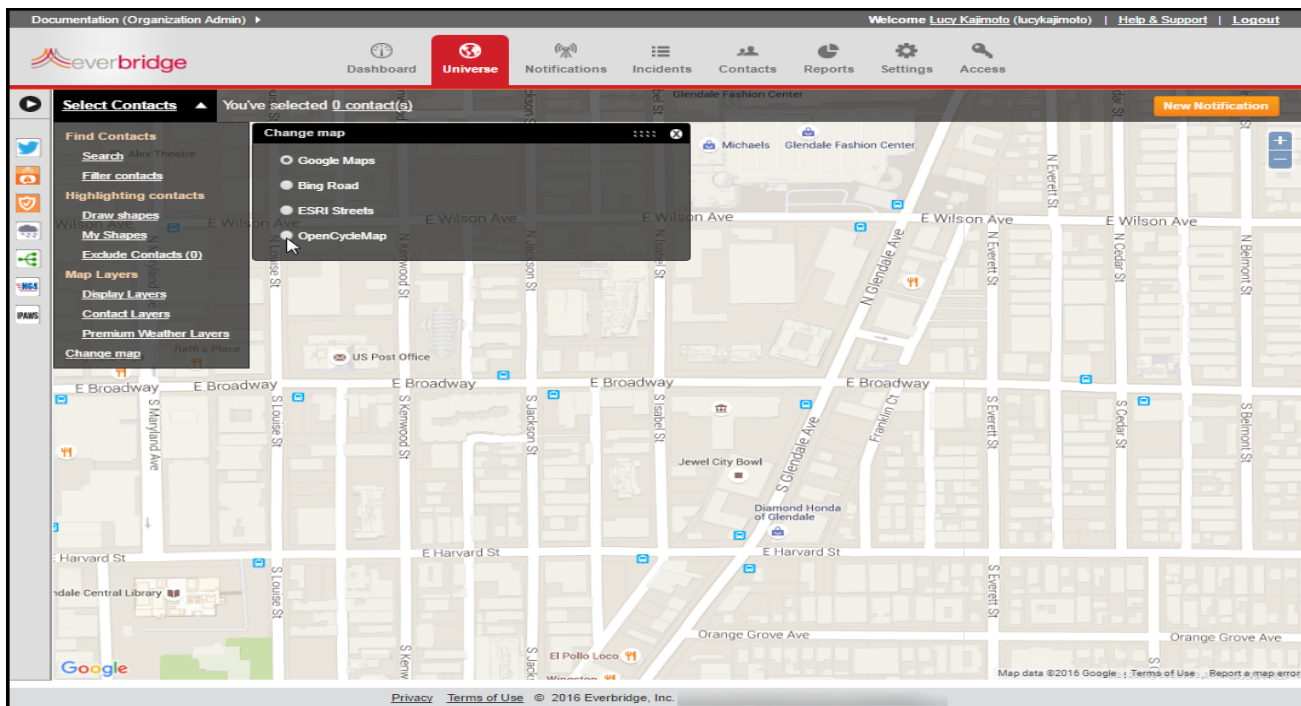
- 1 Click the New Custom Map button to add or edit a custom map.

The dialog box titled "Add/Edit Custom Map" contains the following fields and controls:

- Map Type:** A dropdown menu currently showing "XYZ".
- Max Zoom Level:** A dropdown menu currently showing "18".
- Name:** An empty text input field.
- URL:** An empty text input field.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

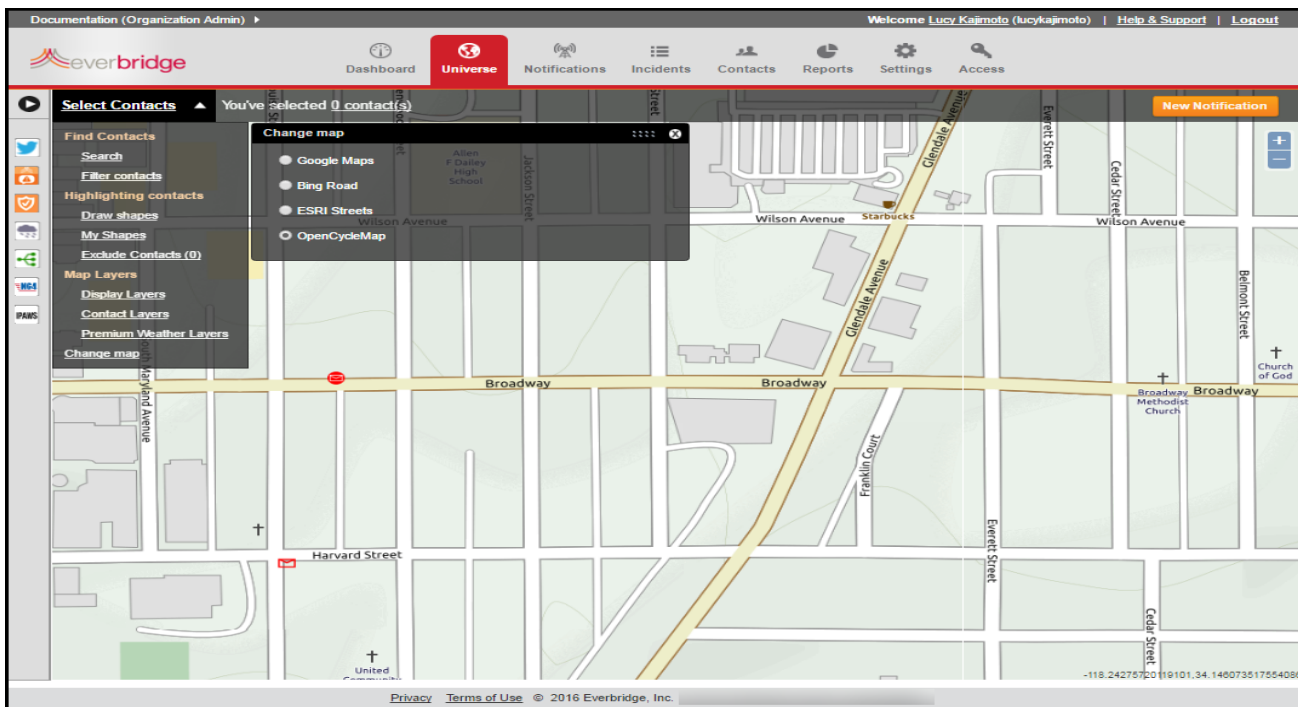
- 2 In the Map Type field, select the corresponding map type.
- 3 From the Max Zoom Level drop-down list, select the maximum zoom level for this custom map.
- 4 In the Name field, type a name for this custom map.
- 5 In the URL field, enter the URL address of the custom map that you want to appear in the list of maps in the Map Defaults page and the map widget in the Manager Portal.
- 6 Click OK.

If the integration of the map is successful, then you should see the map in the preview pane in the lower part of the page. From the Custom Maps page, select the Available check box to make your custom map available on the map widget and the Map Defaults page.





When you select the custom map in the map widget (assuming it is not the default map), the application displays your map to your users. The users in the map widget can toggle between any of the available maps.





Publishing Options

Everbridge offers the following Publishing Options for sending notifications to a gateway. An option is visible here only if it is enabled for your organization.

Everbridge Network

Use this Publishing Option to post messages within the Everbridge client community. This may be of benefit to you if you would like other Everbridge clients to be informed of an event or incident affecting your organization.

When configured, the notification will be published to the organizations you have indicated. Optionally, you can use a shape to specify the impacted area to your network.

Organization Identity

The screenshot displays the Everbridge Settings interface for an Organization Admin. The top navigation bar includes the Everbridge logo, a user profile for 'Lucy Kajimoto', and links for 'Help & Support' and 'Logout'. The main navigation menu contains 'Dashboard', 'Universe', 'Notifications', 'Incidents', 'Contacts', 'Reports', 'Settings', and 'Access'. The 'Settings' page is active, with a sub-menu for 'Organization' containing 'Organization', 'Member Portal', and 'Everbridge Open'. The left sidebar lists various settings categories, with 'Publishing Options' expanded to show 'Everbridge Network' and 'Organization Identity'. The 'Organization Identity' section is selected, showing the following configuration:

- Organization Name: Documentaiton
- Display of logo:
- Category: Corporate
- Area of Responsibility: None Upload shape My Shapes

A 'Save' button is located below the configuration fields.

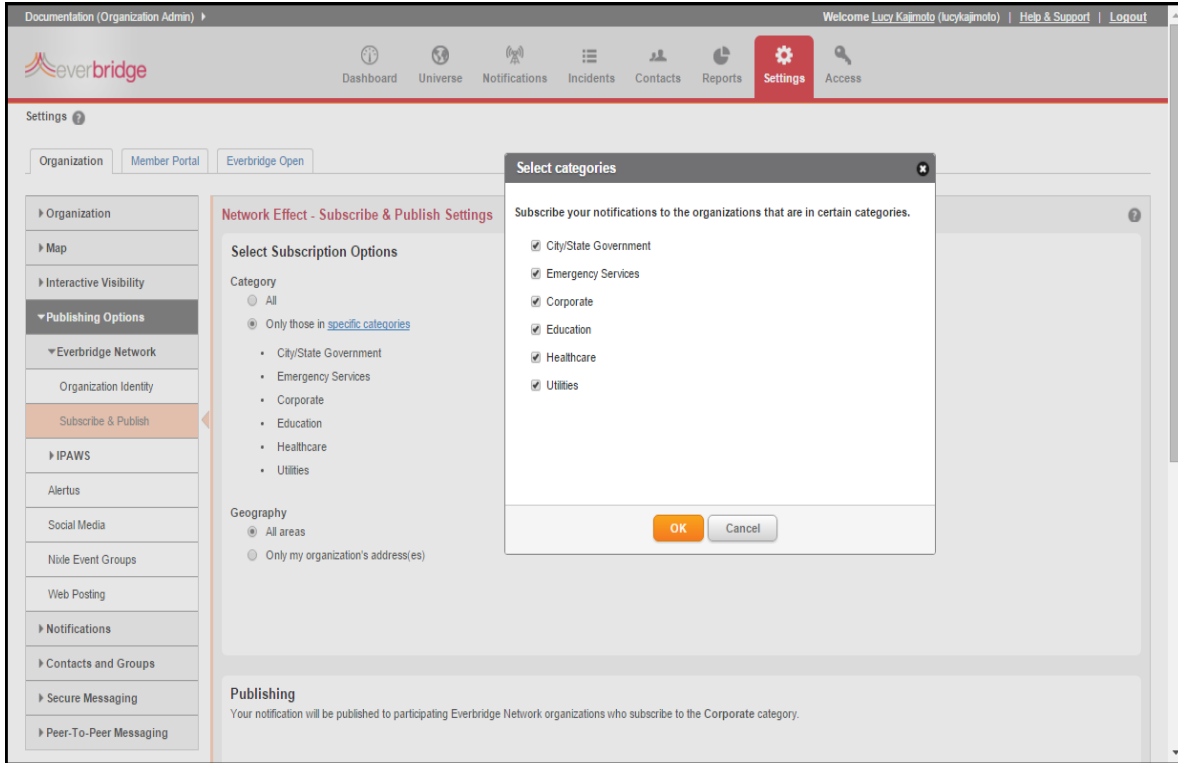


Subscribe & Publish

The screenshot shows the Everbridge web interface. At the top, there is a navigation bar with the Everbridge logo and several menu items: Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings (highlighted in red), and Access. Below the navigation bar, the page title is "Settings" with a help icon. There are three tabs: "Organization" (selected), "Member Portal", and "Everbridge Open". On the left side, there is a sidebar menu with various settings categories, including "Publishing Options" which is expanded to show "Subscribe & Publish" as the active sub-section. The main content area is titled "Network Effect - Subscribe & Publish Settings" and contains a "Select Subscription Options" section. This section has two sub-sections: "Category" with radio buttons for "All" (selected) and "Only those in [specific categories](#)"; and "Geography" with radio buttons for "All areas" (selected) and "Only my organization's address(es)". Below this, there is a "Publishing" section with the text: "Your notification will be published to participating Everbridge Network organizations who subscribe to the Corporate category."



You can choose specific categories of organizations by selecting the radio button: Only those in specific categories. Next, clicking the [specific categories](#) link launches the Select Categories dialog (see the following example). Select one or more categories and click OK.





In addition, you can configure your network Subscribe & Publish settings. Click Save when you have made changes.

The screenshot shows the Everbridge settings interface for 'Network Effect - Subscribe & Publish Settings'. The left sidebar contains a navigation menu with categories like Organization, Map, Interactive Visibility, Publishing Options, Everbridge Network, Organization Identity, IPAWS, Alerts, Social Media, Nixle Event Groups, Web Posting, Notifications, Contacts and Groups, Secure Messaging, and Peer-To-Peer Messaging. The main content area is titled 'Network Effect - Subscribe & Publish Settings' and includes a 'Select Subscription Options' section with radio buttons for 'All' and 'Only those in specific categories'. Under 'Only those in specific categories', there is a list of categories: City/State Government, Emergency Services, Corporate, Education, Healthcare, and Utilities. Below this is a 'Geography' section with radio buttons for 'All areas' and 'Only my organization's address(es)'. The 'Address Information' section contains two address forms. The first form is for 'Everbridge, Inc.' with fields for Location Name, Country (United States), Address (500 N Brand Blvd), Apt/Suite/Unit (Suite 1000), City (Orem), State/Province (California), and Postal Code (91203). The second form is for 'Home' with fields for Location Name, Country (United States), Address (28717 Woodside Drive), City (Santa Clara), State/Province (California), and Postal Code (91300). Both forms include a 'Select Address' dropdown and a 'Find your location on a map' link. At the bottom of the page, there is a 'Publishing' section with a message: 'Your notification will be published to participating Everbridge Network organizations who subscribe to the Corporate category.' A 'Save' button is located at the bottom left of the main content area. The footer contains links for 'Privacy' and 'Terms of Use' and a copyright notice for 2016 Everbridge, Inc.



IPAWS

IPAWS (Integrated Public Alert and Warning System) is a planned multi-agency emergency population warning system in the United States, hosted by FEMA. The IPAWS channels are available to agencies with valid COG IDs. The agencies can send messages to the public via mobile phones, radio, and television.

- ◇ Wireless Emergency Alerts (WEA)
- ◇ Emergency Alert System (EAS)
- ◇ Public Feed
- ◇ COG-to-COG (CAPEXCH)
- ◇ Non-Weather Emergency Messages (NWEM)

Certificate

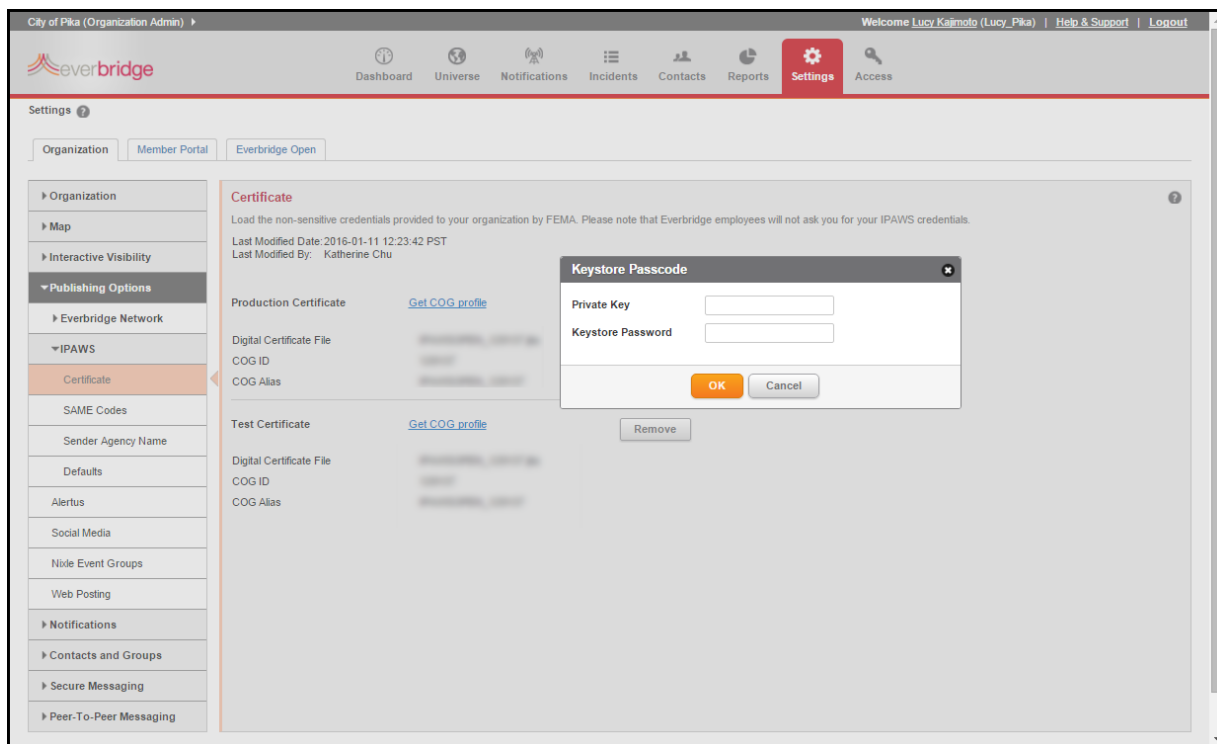
Everbridge integrates with IPAWS channels. Everbridge applications use the clients' credentials when it sends messages on behalf of the clients.

The screenshot displays the Everbridge Organization Settings interface. At the top, there are tabs for "Organization", "Member Portal", and "Everbridge Open". The left sidebar contains a navigation menu with categories: Organization, Map, Interactive Visibility, Publishing Options (expanded), Everbridge Network, IPAWS (expanded), Certificate (selected), SAME Codes, Sender Agency Name, Defaults, Alertus, Social Media, Nixle Event Groups, Web Posting, Notifications, Contacts and Groups, Secure Messaging, and Peer-To-Peer Messaging. The main content area is titled "Certificate" and includes a help icon. Below the title, there is a note: "Load the non-sensitive credentials provided to your organization by FEMA. Please note that Everbridge employees will not ask you for your IPAWS credentials." This is followed by metadata: "Last Modified Date: 2016-01-13 12:56:35 PST" and "Last Modified By: Lucy Kajimoto". The form is divided into two sections: "Production Certificate" and "Test Certificate". Each section contains a "Digital Certificate File" field with a "Choose File" button and "No file chosen" text, a "COG ID" text input field, and a "COG Alias" text input field. A "Save" button is located below each section.



NOTE: When sending to the IPAWS publishing option, you do not select a list of recipients, and the message recipients cannot confirm receipt or reply.

To fill in the fields on this page, select the corresponding link for the Production Certificate or the Test Certificate: Choose File. Then, navigate to the file and double-click it. Next, type the COG ID as provided to you by FEMA, and type a COG ID Alias. Click Save. Repeat if you want to do the same for the other Certificate.



When needed, select the corresponding link for the Production Certificate or the Test Certificate: Get COG profile. The Keystore Passcode dialog appears. Fill in the Private Key and Keystore Password, then click OK. The system retrieves the COG Profile, displaying the IPAWS information. Click OK (or Print, then OK).

The application converts all fields to read-only format and stores the three entries as one record for the organization. The page displays the audit information: time stamp and full name of the user who last updated the content of this page. This COG “common name” value that FEMA sends in the email to alerting authorities is not currently needed when sending notifications to IPAWS.

The current format of the COG Alias is "IPAWSOPEN_{COG_ID}". You should receive the COG ID in an email from FEMA when you are granted credentials to send messages to IPAWS.



An organization can load two sets of IPAWS credentials: one for Live and one for Test. If you want multiple agencies to send IPAWS messages, and each agency has their own set of credentials, then each agency needs their own organization. You are responsible for maintaining the accuracy of your credentials. The application does not verify the accuracy of the information loaded on this page.

To update, you must remove all credentials in order to edit any component. Click Remove. Confirm the deletion and the values are purged.

You must load these non-sensitive credentials before attempting to send a notification to IPAWS from within Everbridge Suite.



SAME Codes

The SAME Code (Specific Area Message Encoding code) is a NOAA-provided code that extends the 5-digit FIPS code to 6-digits by enabling the first digit (left-most) to be used to identify a sub-geographical area in a county. The SAME code value must be 6-digits; for example, 006037. The current list of SAME codes is available at:

http://www.nws.noaa.gov/nwr/coverage/county_coverage.html

An organization that uses IPAWS must include at least one SAME code. Only agencies with permission to send messages to more than one county in a state will have more than one value in the list. If the list is populated with more than one SAME code, the administrator can sort the list as desired.

The screenshot displays the Everbridge Administration Console interface. The top navigation bar includes the Everbridge logo, a user profile for Lucy Kajimoto, and various system icons like Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings, and Access. The main content area is titled 'Settings' and has a sidebar menu on the left with categories like Organization, Map, Interactive Visibility, Publishing Options, Everbridge Network, IPAWS, and Notifications. The 'SAME Codes' option is selected in the sidebar. The main panel shows a table with columns for 'Sequence', 'Code', and 'Description'. Below the table are two input fields: 'Must be 6 digits' for the Code and 'Maximum 30 characters' for the Description, followed by an 'Add' button.

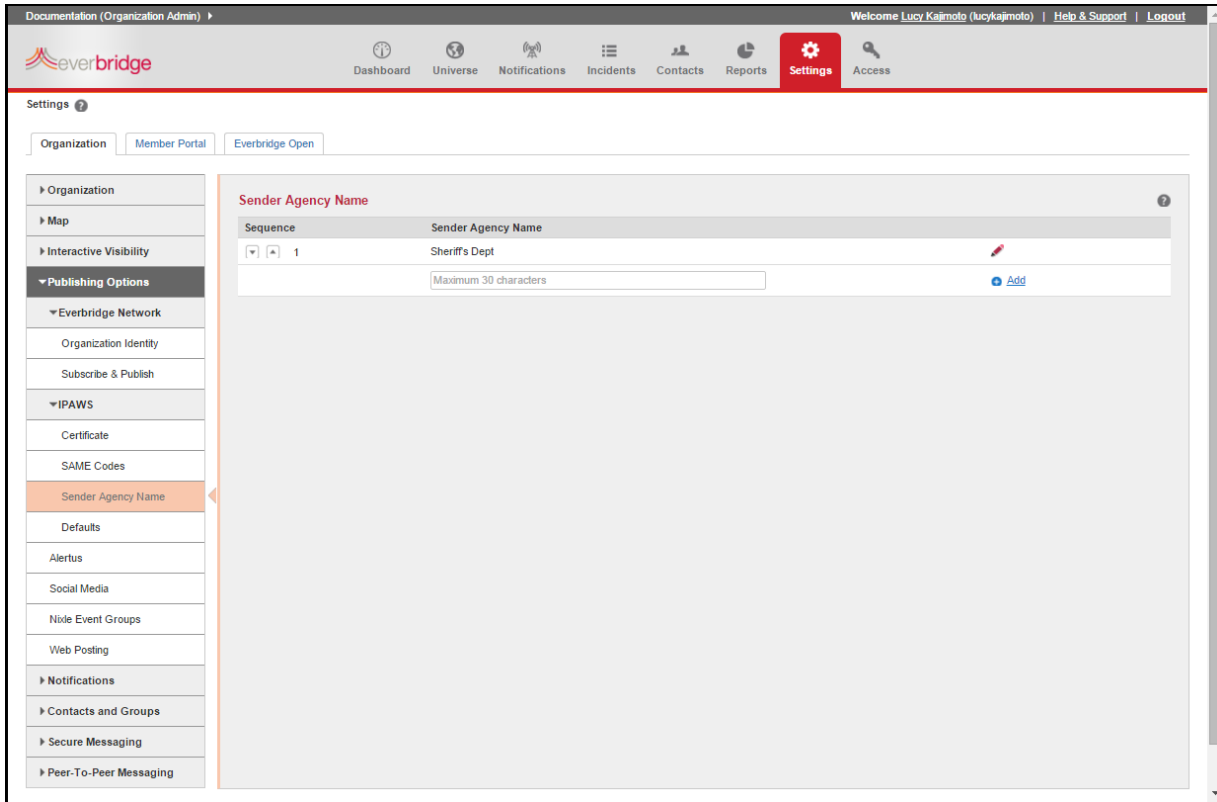
The SAME code field will be used in the message sent to IPAWS. The Geographical Description enables the administrator to set a label for each code to assist other administrators with troubleshooting.

Enter the SAME Code and its description. then click Add for each individual entry. If there are multiple SAME codes, the administrator can click the up or down arrows to re-sequence the list.



Sender Agency Name

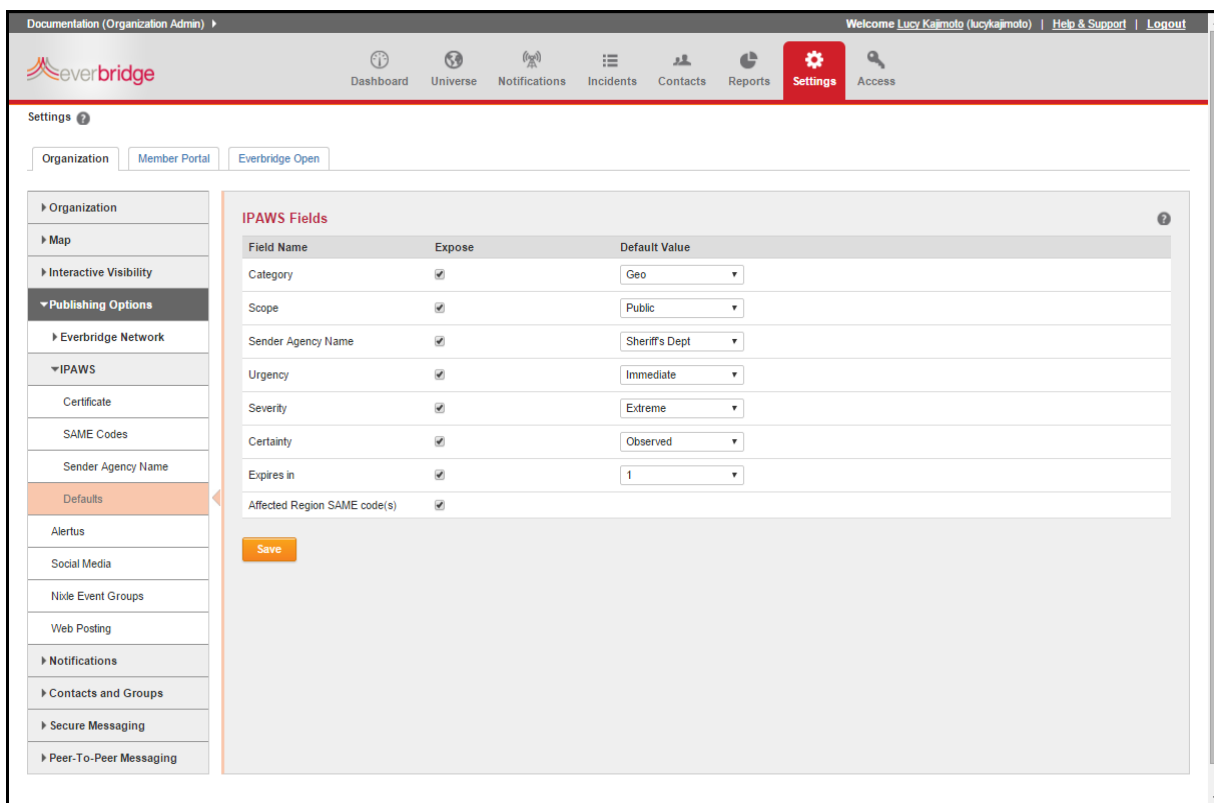
Administrators can enter one or more Sender Agency names. Type the Sender Agency Name and click Add. If there are multiple Sender Agency names, the administrator can click the up or down arrows to resequence the list.





Defaults

The administrator can hide fields on the IPAWS form, as needed. Initially, all fields are exposed to the user on the notification form.



Clear the corresponding check box to hide a field. In addition, the administrator can optionally select the Default Values for each field. This eliminates the probability of the user entering incorrect values on the user form.



Alertus

The Alertus Profile provides a way for personnel to relay important emergency alerts through Alertus, an Everbridge Partner providing desktop alerts, alert beacons, and digital signage.

On the Alertus side, there are steps you need to take. From Alertus, refer to the *Alertus - Everbridge Integration* document for detailed instructions. The document explains how to:

- ◇ Allow the Everbridge Mass Notification application to communicate with the Alertus Server.
- ◇ Make a required configuration change to the Alertus Server.
- ◇ Create one or more Alert Services that launch a notification in Everbridge Suite.

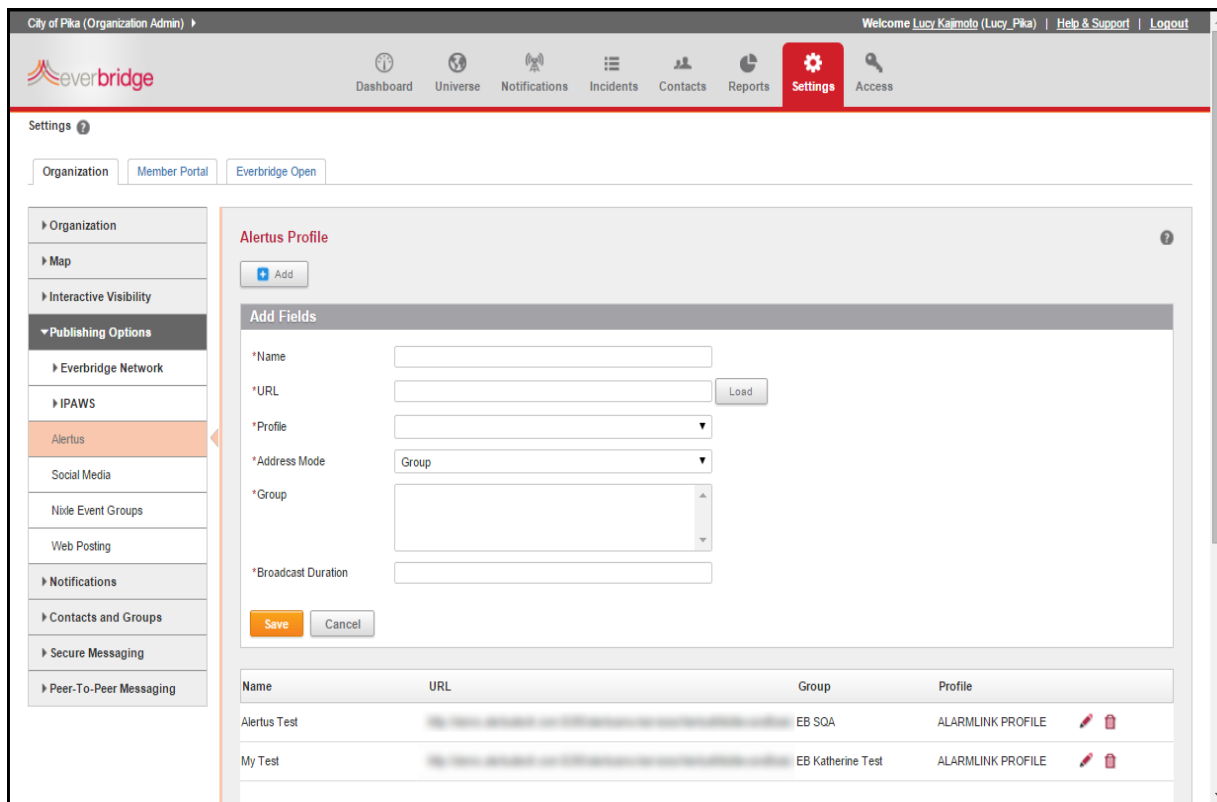
NOTE: Contact your Alertus consultant for help in designing Alertus profiles, address modes, groups, and more.

After you have set up your Alertus configuration, you can create a new Alertus Profile in Everbridge Suite.

To create a new Alertus launch configuration

- 1 From the Settings tab > Organization sub-tab, select Publishing Options > Alertus. The Alertus Profile dialog appears.
- 2 Click Add.

The Add Fields pane is displayed.



3 Populate the fields as follows. All fields are required.

Field	Description
Name	Enter the name that will be used to refer to this configuration in Everbridge.
URL	Enter your correct Alertus API URL. This should be in the format: <code>http://[your Alertus Hostname or IP]:8280/alertusmw/services/AlertusMiddlewareBasic?wsdl</code> Click "Load" after entering the URL to populate the fields below. If you encounter problems, ensure that your server URL is correct and that your Alertus server is network-accessible from the Everbridge servers over the internet.
Profile	From the drop-down list, select the Alert Profile that will be used for this alert. NOTE: If you are using an Alertus product like Desktop Alert, but the respective Alert Service is not included in the selected Alert Profile, then this device will not be activated.
Address Mode	From the drop-down list, select All to add all active Alertus Devices to the target list. (Select Group to only add certain Alertus Groups.)
Broadcast Duration	Enter the time, in minutes, that the alert should be active on Alertus. The minimum is 2 minutes.



- 4 Click Save.
- 5 Repeat steps 1-4 for each Alertus launch configuration you need.

To launch an Alertus alert as part of a notification, from the Notifications tab, select New Notification. In the Publishing Options section, select the Alertus check box and select the Alertus launch configuration you want to use from the drop-down list.



Social Media

This is a premium feature.

Use this publishing option to post your notifications to your Twitter and/or Facebook accounts.

The screenshot shows the Everbridge Settings page for an Organization Admin. The 'Social Media' section is selected in the left-hand navigation menu. The main content area displays 'Social Media Accounts' with two buttons: 'Sign in with Twitter' and 'Login with Facebook'. Below these buttons is a table with the following data:

Channel	Account Name	Status	Expiration Date
	@EBS_OA	Unlink your Twitter account	
	Ebs QA	Unlink your Facebook account	

At the bottom of the page, there are links for 'Privacy' and 'Terms of Use', and a copyright notice: '© 2016 Everbridge, Inc.'.

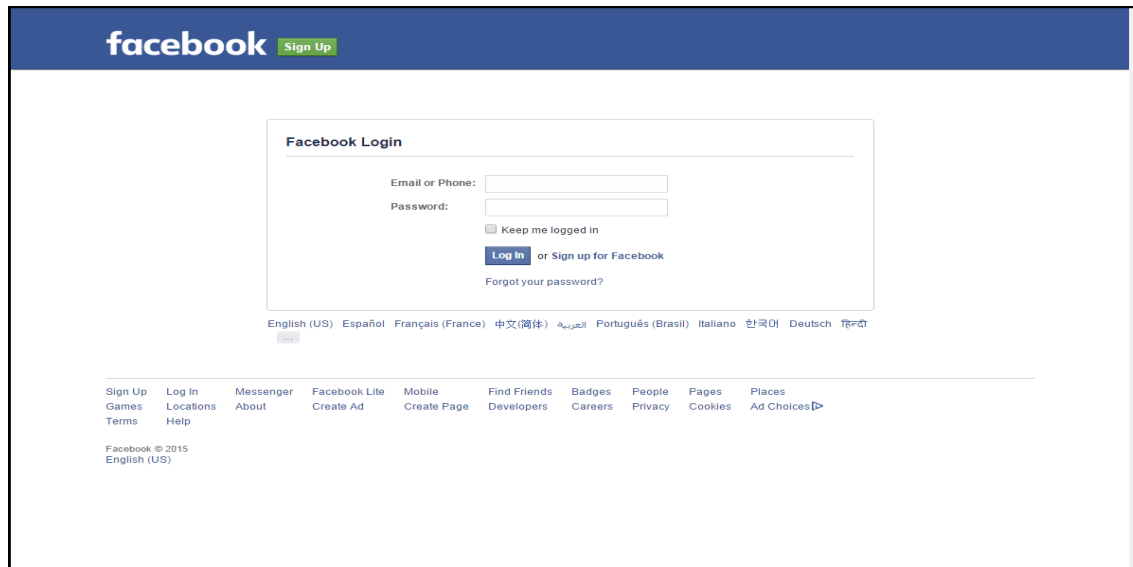
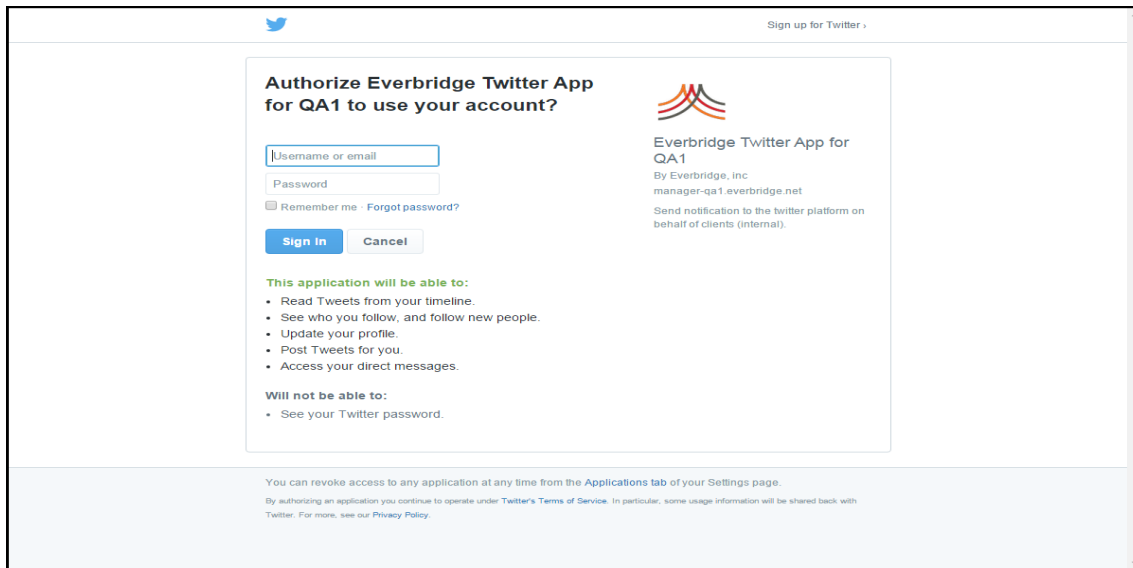
- ◇ **Twitter**—The Twitter account has no expiration. You can unlink the account at any time.
- ◇ **Facebook**—A public Facebook account expires in 60 days and must be relinked. The expired or unlinked Facebook accounts will display as gray text in the Settings. They will not be available to your users in the Notification form. You can unlink the expired account at any time.

In Facebook, you can post your messages to your Facebook wall and/or to Fan Pages that you administer. At least one area must be selected. There are no defaults. If you have Fan Pages set up in Facebook, then expiration does not apply.

To sign in with Twitter or login with Facebook, see the following example dialogs you must fill in to link the accounts.



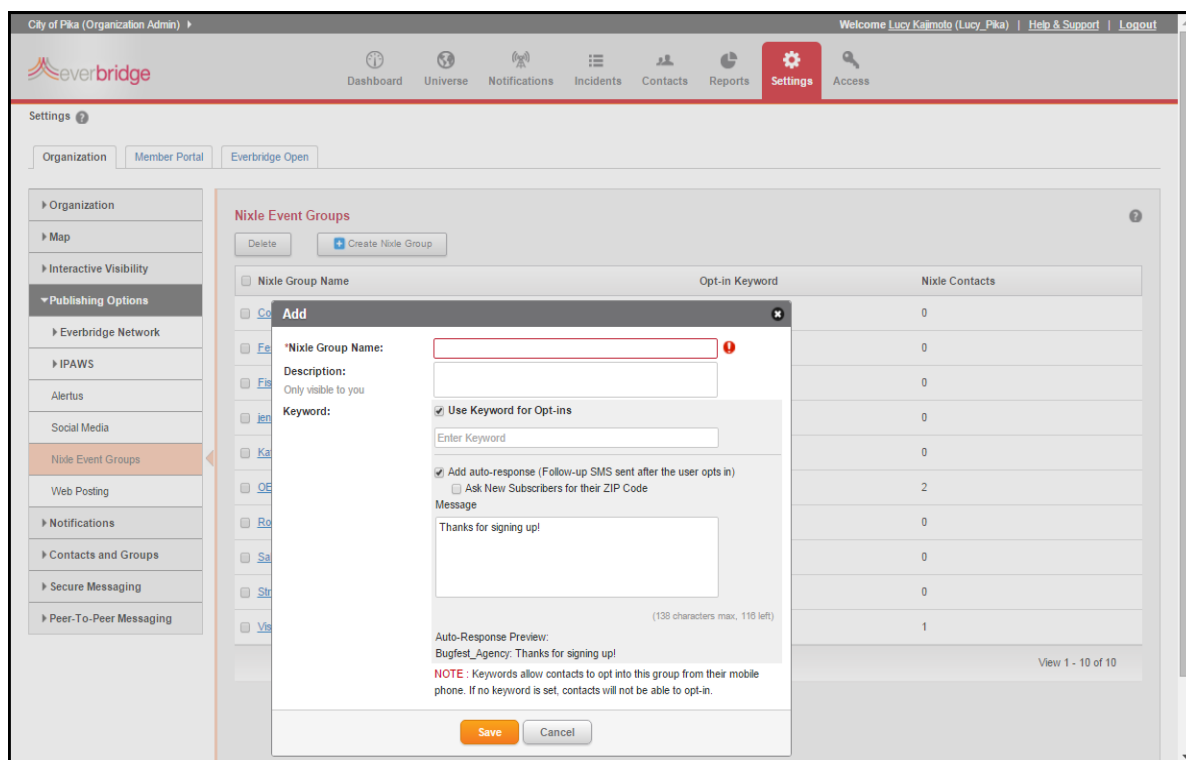
Select the desired social media button, then sign in.





Nixle Event Groups

To add an event group, click Create Nixle Group. Fill in the required Nixle Group Name and optionally the other fields. If you want to use a keyword for opt-ins, select the Use Keyword for Opt-ins check box, enter the keyword, and optionally select the check box to Add auto-response (Follow-up SMS sent after the user opts in).





Web Posting

To initiate notifications to partner systems or client-side web sites, you can provide one or more URLs. As needed, provide a corresponding username and password for each URL. When sending your notifications, you can select Web Posting as a publishing option and then select the check box for the specific URLs.

URL	Display Name	Username	Password	
https://www.socialtunnel.net/send/all?by=everbridge	All		*****	
https://www.socialtunnel.net/send/facebook?by=everbridge	Facebook Only		*****	
https://www.socialtunnel.net/send/twitter?by=everbridge	Twitter Only		*****	

NOTE: Since each implementation is unique, it is recommended that you work with your IT department to ensure proper configuration of the Web Posting feature.

Customer Web Service Requirements

The Customer Web Service receives the HTTP POST notification from the Everbridge system.

In order to set up the Customer Web Service to receive Everbridge notifications, the web service must meet the following requirements:

- 1 The web service must exist and be reachable from the Internet.
- 2 The web service endpoint must accept an HTTP POST of content type "application/json" with a JSON encoded body.
- 3 The web service may use HTTP Basic Authentication.
- 4 The web service may use SSL/HTTPS.



- 5 The web service must respond with a valid HTTP status code as an acknowledgment for successful or unsuccessful receipt of the Notification.

NOTE: Response codes returned by external web services are logged by Everbridge for troubleshooting purposes. They are not currently reflected in the Notification reports in the Everbridge Notification Reports through the Manager Portal.

Everbridge Notification Format

An Everbridge notification sent to the web service endpoint will be JSON-encoded and will have the properties shown in the following sample message.

```
{"title" : "Notification Title", "body" : "Notification Body", "fileAttachments" : ""}
```

NOTE: *fileAttachments* will not yet produce the Notification Attachment. This functionality is coming soon.

JSON parsers are available for most programming languages. Your web service endpoint should parse the above message. After parsing the message, you can perform whatever logic you desire using the properties of the message.

Everbridge Configuration

Once the web service endpoint is working as discussed, you can configure the service in your Everbridge settings.

- 1 Select Organization >Publishing Options >Web Posting in the Everbridge web interface.
- 2 Click Add on the right-hand side under Web Posting Settings.
- 3 Input the following values:
 - a URL: The URL to which you want to POST an Everbridge Notification.

NOTE: The URL must be accessible by the Internet.

- b Display Name: The name this URL POST should have in the Everbridge UI when creating a Notification.
 - c Username: IF the URL requires HTTP BASIC Authentication, the username for the URL.
 - d Password: IF the URL requires HTTP BASIC Authentication, the password for the URL.
- 4 Click Save.

Having followed these steps, you will see the value you set in "Display Name" when you select the "Web Posting" check box during notification creation. Selecting the option will send a message to your web service.



Stopping or Expiring a Web Posting Notification

Customers using the Web Posting Notification feature currently have two options to stop or expire a Notification:

- ◇ Develop logic on the Customer Web Service to remove or replace a Notification based on your own business requirements (for example, elapsed time, updated HTTP POST, and so forth).
- ◇ Develop a web service call to Everbridge's REST API for Notification Configuration element in order to determine if the Notification Title is listed as an active notification. This call can be executed at an interval of your choosing, but not recommended at less than 5 minutes from the time of receipt of the original HTTP POST.



Notifications

The Notifications settings allow you to directly configure many default options within the Everbridge Suite system. It provides immediate access to the Organization settings so that you can adjust them specifically to your organization's preferences.

NOTE: The Notifications settings are also available from the Account level. The following are the same as described for the Organization level: Notifications > Default Options, Notifications > Sender Information, Notifications > Delivery Methods, and Notifications > Broadcast Throttling.

Default Options

Configuring the most commonly used settings as the default options reduces the chances of human error while sending the notification.

Enter your default settings for the options available and click Save when you are done.

When you are sending a notification, you can change these settings if needed.



The screenshot displays the Everbridge Organization Admin interface. The top navigation bar includes 'Documentation (Organization Admin)', 'Welcome Lucy Kajimoto (lucykajimoto)', 'Help & Support', and 'Logout'. The main navigation menu contains 'Dashboard', 'Universe', 'Notifications', 'Incidents', 'Contacts', 'Reports', 'Settings', and 'Access'. The 'Settings' page is open, showing a sidebar with categories like 'Organization', 'Map', 'Interactive Visibility', 'Publishing Options', 'Notifications', 'Sender Information', 'Delivery Methods', 'Broadcast Throttling', 'Conference Bridges', 'Phone - Voice Greeting', 'Email - Header & Footer', 'Contacts and Groups', 'Secure Messaging', and 'Peer-To-Peer Messaging'. The 'Default Options' section under 'Notifications' is expanded, showing settings for 'Notification Language' (English (US)), 'Voice Delivery PIN' (1234), 'Confirmation Requested' (No), 'Voicemail Preference' (Message Only), 'Broadcast Cycles' (10 Maximum), 'Broadcast Duration' (1 hr(s)), 'Interval Between Cycles' (0 min(s)), 'Interval Between Delivery Methods' (0 min(s)), 'Delivery Order' (Contact Preferred), 'Notification Escalations' (Incident Management, Mass Notification), 'Allow Separate Email Content' (Yes), 'Launch Notifications by Phone' (Incident Management, Mass Notification), and 'Scenario Manager' (Incident Management). The 'ContactBridge' section includes 'Message Sharing' (Allow my contacts to share messages with their extended network, Default message sharing to CN), 'Send secure push messages:' (To contacts, To Secure Messaging apps), 'Member Scheduling' (Enable Schedule Self Service for Availability and Replacement), and 'Safety' (Enable safety features in ContactBridge, Select at least one: Check In, SOS and Safe Corridor, Safe Corridor Check In Interval: 5 Min, Allow user-specified custom interval). A 'Save' button is located at the bottom of the settings area.

- **Notification Language**-Use this option to include the language-appropriate text or voice prompts in each message. The Language setting is also used to convert your message text into an audio message for notifications sent to voice path. Your users can select another language when preparing a new notification. (Note: The language setting does not translate the text. You must enter the text in the correct language.)
- **Voice Delivery PIN**-Use this option to ensure your notifications sent to a phone path are only heard by an authorized recipient. Select the check box and enter a PIN (4-10 digits). Distribute the PIN to your contacts before sending a voice notification. When you recipients receive a voice call, they will first be prompted to enter the PIN



before the Everbridge application will play the message. Your message senders can disable this option when preparing a notification if they do not want message recipients prompted for a PIN code.

- **Confirmation Requested**-Use this option to request a confirmation of receipt from your message recipients. For example, in a notification sent to an email address, Everbridge will include a hyperlink for the users to confirm receipt of the message. In a voice message, users are prompted to press a key. The Notification Report reflects who confirmed receipt of your notification.
- **Voice Mail Preference**-Use this option to instruct the Everbridge application how to behave if it encounters voice mail when attempting to deliver a voice notification. You can select whether to end the call (No Message), leave the message (Message Only), or leave the message along with call-back information for confirming receipt (Message with Confirmation).
- **Broadcast Cycles**-Use this option to set the number of times the Everbridge application should attempt to notify your contacts. In "Maximum", enter the highest number of cycles your users can use; they will not be able to change this value when preparing a notification. In "Default" enter a default value for all new notifications; your users will be able to change this value before they send the notification. For example, if you send a notification to contacts who have four devices in their contact record and the Broadcast Cycles is set to "2", then the Everbridge application attempts to send the notification twice to all devices assuming the contact has not already confirmed receipt.
- **Broadcast Duration**-Use this option to control for how long the Everbridge application should attempt to notify your contacts and for how long your contacts have for confirming receipt of your notification. Ensure the duration is long enough to send all of the messages. If you have a high number of contacts to whom to send messages and the duration is too short, the notification might not go to all contacts.
- **Interval Between Cycles**-Use this option to control how long the system waits before trying the next cycle. If you use "0" (zero), the next cycle begins immediately after the previous cycle.
- **Interval Between Delivery Methods**-Use this option to control how long the system waits before moving on to the next delivery method for a contact. For example, if the contact has four delivery methods, then this is the length of time (in minutes) the system waits before sending the notification to the next delivery method. If the contact confirms one path, then system will not attempt a notification to the subsequent paths. If you use "0" (zero), then the system tries to send the notification to all devices as quickly as possible.
- **Delivery Order**-Use this option to select the order of the delivery methods used for the notification.
 - **Organization Default**—The order specified in Settings > Organization > Notifications > Delivery Methods at the Organization level. This option will override the delivery method order specified in the contact record.
 - **Account Default**—The order specified in Settings > Organization > Notifications > Delivery Methods at the Account level. This setting overrides the delivery method order specified in the contact record.
 - **Contact Preferred**—The order specified in each contact's record.



- **One-Time Custom**—Define the delivery method order for this single notification; this option overrides all other delivery method orders.
- ◇ **Notification Escalations**—Use this option to allow users to define an escalation policy within a notification under Notifications or Incidents.
- ◇ **Allow Separate Email Content**—Use this feature to allow your users to include a separate message for email notifications using a rich text formatting tool. Users will be able to also use a separate plain text message for SMS text, fax, pagers, and text-to-speech.
- ◇ **Launch Notifications by Phone**—Use this feature to allow your users to launch notifications by phone for Incident Management and/or Mass Notification.
- ◇ **Scenario Manager**—Use this option for Incident Management.
- ◇ **ContactBridge**
 - **Message Sharing**—Use this feature to allow your contacts to share notifications you send with their extended network. Optionally, toggle default notification sharing OFF.
 - **Secure Push messages to contacts**—Use this feature to send secure push messages to contacts. When the check box is selected, enter the customer-provided Push URL, Username, and Password to send secure push messages to contacts who have ContactBridge as their delivery path.
 - **Secure Push messages to Secure Messaging Apps**—Use this feature to send secure push messages to Secure Messaging Apps.
 - **Member Scheduling**—Use this feature to enable your contacts to manage their availability on the Organization's calendars via the mobile application.
 - **Safety**—Use this feature to enable the Safety feature in ContactBridge. Select at least one: SOS and Safe Corridor and/or Check In. If you select SOS and Safe Corridor, set the number of minutes to check in. Also select the check box to allow the user to specify a custom duration, where the members can create their own custom intervals from the app.



Sender Information

This feature is required.

The Sender Information is used for notifications sent to email and phone delivery methods. Use these features to identify yourself as the message sender to your notification recipients. This allows you to obtain better confirmation rates. Click Save after configuring your Sender Information.

The screenshot shows the Everbridge Settings page for an Organization Admin. The 'Sender Information' section is active, displaying the following configuration:

- Sender E-Mail Display:** rod.lemmon@gmail.com [Edit](#)
- Sender Caller ID:** A table with columns for Default, Country, and Caller ID.
- Permission:** Allow notification sender to edit sender email and sender caller ID
- Save:** A prominent orange button.

Default	Country	Caller ID	
<input checked="" type="radio"/>	United States	8185001258	Edit Delete
<input type="radio"/>	Inmarsat (Ships At Sea)	81231234	Edit Delete
	Select Country		Add

- ◇ **Sender E-mail Display**—Use this feature to display a name or email address your message recipients will see in the "From" field when your email notification arrives in their email inboxes. Set the Sender Email Address to a value that will motivate your recipients to open your email as soon as possible. The identifier can be a label such as "Security Desk", "City Police Department", or "Office of the President", or an email address such as securitydesk@email.com, citypd@city.gov, or president@corporate.com. To set the Sender E-Mail Display, click Edit, type the identifier, and click Save.
- ◇ **Sender Caller ID**—Use this feature for notifications sent to voice paths to display as the Caller ID when the recipient receives the call.
 - **Default**—If you add more than one Caller ID, then choose which one will be the default Caller ID. If a call is placed to a country that does not have a defined Caller ID, then the application will use the default Caller ID.
 - **Country**—Select the country corresponding to the Caller ID.
 - **Caller ID**—Enter the full phone number corresponding to the Country. Click the Pencil icon in the row of the Caller ID you want to edit.



Click the Trash Bin in the row of the Caller ID you want to delete.

- ◇ **Permission**—Select the check box if you want the notification sender to edit the sender information when preparing a new notification.

Delivery Methods

This is a required feature.

You must add one or more delivery methods for sending notifications to your contacts. You can view the various delivery methods (Code) by selecting them from the drop-down list

The screenshot shows the Everbridge Organization Admin interface. The top navigation bar includes 'Dashboard', 'Universe', 'Notifications', 'Incidents', 'Contacts', 'Reports', 'Settings' (highlighted), and 'Access'. The left sidebar shows a navigation menu with 'Delivery Methods' selected. The main content area displays a table titled 'Delivery Methods' with columns for Sequence, Default, Code, and Prompt. A dropdown menu is open for the 'Code' column of the first row, showing a list of available delivery methods such as 'E-Mail Address 3', 'Extension Phone 2', 'Extension Phone 3', 'Extension Phone 4', 'Extension Phone 5', 'Fax 2', 'Fax 3', 'OneBridge App', 'Phone 2', 'Phone 3', 'Phone 4', 'Phone 5', 'Phone 6', 'SMS 2', 'TTY 2', and 'TTY 3'. The 'Default' checkbox for the first row is checked.

Sequence	Default	Code	Prompt
1	<input checked="" type="checkbox"/>	E-Mail Address 1	Work Email
2	<input checked="" type="checkbox"/>	Mobile Push Alert	HipaaBridge
3	<input type="checkbox"/>	Phone 1	Work Phone
4	<input type="checkbox"/>	SMS 1	Text Message
5	<input type="checkbox"/>	Select Code	TAP Pager
6	<input type="checkbox"/>	E-Mail Address 3	Home Email
7	<input type="checkbox"/>	Extension Phone 2	TTY 1
8	<input type="checkbox"/>	Extension Phone 3	FAX 1
9	<input type="checkbox"/>	Extension Phone 4	Extension Phone 1
10	<input type="checkbox"/>	Extension Phone 5	Numeric Pager
11	<input type="checkbox"/>	Fax 2	SMS 1-Way
12	<input type="checkbox"/>	Fax 3	Plain Text 1-Way
13	<input type="checkbox"/>	OneBridge App	Plain Text 2-Way

You can:

- ◇ Select from any of the available delivery methods.
- ◇ Assign a custom name for each delivery method, so your users can select the correct delivery method for their notifications.

The different delivery methods require different types of input when you add a contact.



For example:

Delivery Method	Advanced Configuration	Recipient's Message Format	Recipient Confirms by:
Email Address #	N/A	Content of Body field or Email Only field in the notification form	Clicking the link: "Please click here to acknowledge receipt of this message."
Extension Phone #	Click the Advanced link to change the default Wait time from 3 seconds.	Audio message	Pressing "1" after listening to the message or using the callback information to dial phone number and enter message ID.
Fax #	N/A	Content of the Body field in the notification form	Calling the phone number provided on the fax and entering the PIN provided on the fax.
Mobile Push Alert	N/A	The content of the Body field is displayed in the message field and the content of the Email Only field is an attachment to the message	Using the REPLY feature in the app.
Numeric Pager	N/A	Audio message only	Calling the phone number provided and entering the PIN.
OneBridge App	N/A	Content of the Body as a push notification. Content and Body in the notification.	N/A
One Way SMS	N/A	Content of the Body field in the notification	Calling the phone number provided and entering the message ID.
Phone	Click the Advanced link to change the default Wait time from 3 seconds.	Audio message only	Pressing "1" after listening to the message or using the callback information to dial phone number and enter message ID.
Plain Text Email 1-Way	N/A	Content of the Body field in the notification	Dialing the callback number provided and entering the message ID.
Plain Text Email 2-Way	N/A	Content of the Body field in the notification	Using the REPLY feature in the device.
SMS	N/A	Content of the Body field in the notification	Using the device's REPLY feature.
TAP Pager	N/A	Content of the Body field in the notification	Dialing the callback number provided and entering the message ID.
TTY	N/A	Content of the Body field in the notification	Dialing the callback number provided and entering the message ID.

- ◇ Define the Organization sequence of the delivery methods by moving the delivery methods in the list using the Up and Down arrows located on the left-hand side of each path code.
- ◇ Select the DEFAULT check box for the delivery methods you want pre-selected when a user creates a notification. The notification sender can change the delivery methods for the notification, but setting the defaults for the most common delivery methods saves time and helps to eliminate mistakes.
- ◇ Use the Pencil icon to edit the Prompt value or the Advanced Configuration of a delivery method.



- ◇ After making changes, click the Save icon to keep your changes or the Cancel icon if you do not want to keep your changes.
- ◇ Delete a method by clicking the Trash Bin icon in the desired row. Confirm the deletion. (Be careful that this delivery method has not been used in a template or recurring notification.)
- ◇ The information is removed from the contact record, but the contact can add it again if needed. In addition, to delete a delivery method using the CSV file, the specific field and all of its corresponding fields must be empty. If so, then the Delivery Method is removed from the contact record. However, if any field still has content, then no changes occur in the contact record. For details about the delivery methods, see *Data Dictionary Overview* on page 249.



Broadcast Throttling

This is an optional feature.

When you start a notification, Everbridge will try to deliver the message as quickly as possible. If you are sending phone calls, then it is possible that the system receiving the calls will not be able to handle all the phone calls simultaneously. For example, a notification might place 200 calls to an office location with a PBX phone system that can only accept 125 calls at a time.

Use this feature to control the number of simultaneous phone calls made to your jurisdiction or to your locations. For example, if the PBX or the central office can handle only 125 calls, then you could set the maximum simultaneous phone calls to 100. In this case, the notification is sent to the first 100 calls, and not to the entire 200. It will not send another call until one of the first 100 has ended.

To control the number of simultaneous calls, set up rules based on the dialed number. For example, the PBX at your office starts with the phone number 818230 and might only be able to handle 150 calls at a time. Define a rule to limit the maximum simultaneous calls to that PBX to 125.

You can have different rules for different locations. You can also have a default limit for calls that do not match any of the rules.

To define a rule, start by giving it a Rule Name. Then select the country in which the dialed numbers are located. Type the Throttling Pattern for this rule. If the phone number to be dialed for the contact matches this pattern, the rule will be used. Using the example above, the Throttling Pattern would be 818230 and the Max Simultaneous Calls 125. Click Add. Repeat this process for any additional rules. When done, click Save.



The screenshot shows the 'Broadcast Throttling' settings page. The left sidebar lists various settings categories, with 'Broadcast Throttling' highlighted. The main content area is divided into two sections: 'Preferences' and 'Throttling Rules'.

Preferences
Any change made to preferences will not be applied to already initiated notifications. (scheduled or template)

- Apply to all notifications
- Require on all notifications
- Show rules to notification initiator

Throttling Rules
Throttling rule change will apply to all notifications

Maximum number of active simultaneous calls that are not defined by the rules below [No limit](#) [Edit](#)

Rule Name	Country	Throttling Pattern	Max Simultaneous Calls	
Glendale Office	United States	818230	125	
Burlington Office	United States	781859	100	

Below the table, there are input fields for a new rule: a text box, a 'Select Country' dropdown, another text box, and a third text box, followed by an 'Add' button.

Click the Pencil icon to edit a rule. Make your changes and click the Save icon. Or, click the Cancel icon to keep the original values. Click the Trash Bin to delete a rule. Confirm the deletion.

You can set a maximum to be used if the dialed number does not match any of the rules. By default, there is no limit to the number of simultaneous calls if a throttling rule is not matched. To set a maximum number of calls, click Edit. Type the maximum number of calls in the text box and click Save.

When you make changes to throttling rules, the new values are used the next time a notification is sent, including any notification templates and scheduled messages.

In the **Preferences** section of Broadcast Throttling, you can configure how the throttling rules are to be used in a notification.



- ◇ If all the check boxes are clear, then the throttling rules are not available to be used in a notification.

Settings [Edit](#)

*Sender E-Mail Display: rod.lemmon@gmail.com

*Sender caller ID: [View](#)

Delivery Order: Contact Preferred

* Delivery methods: Work Email
HippaaBridge

ContactBridge Settings: [View](#)

Apply voice delivery throttling rules: No

Broadcast duration: 1 hr(s)

Contact cycles: 1

Interval between cycles: 0min(s)

Interval between delivery methods: 0min(s)

Voice delivery PIN : No

Voice mail preference: No Message

Confirm: Yes

Language: English (US)

- ◇ If the check box: Apply to all notifications is selected, but the check box: Require on all notifications is clear, then the throttling rules are applied by default. However, the notification sender can disable the throttling rules for a notification by clearing the check box: Apply voice delivery throttling rules in the Notification Settings pane.

Apply voice delivery throttling rules: Yes

Apply to all notifications

Require on all notifications

Apply voice delivery throttling rules for this notification

- ◇ If the check box: Require on all notifications is selected, then the throttling rules are applied by default and the notification sender cannot turn them off. See the following example Notification Settings pane.

Apply voice delivery throttling rules: Yes

Apply to all notifications

Require on all notifications

Apply voice delivery throttling rules for this notification

- ◇ If the check box: Show rules to notification initiator is selected, then the notification sender can view the rules by clicking View Rules in the Notification Settings pane.

Apply voice delivery throttling rules: Yes

Apply voice delivery throttling rules for this notification

[View Rules](#)

Maximum number of active simultaneous calls that are not defined by the rules below: No limit

Rule Name	Country	Throttling Pattern	Max Simultaneous Calls
Glendale Office	United States	818230	125
Burlington Office	United States	781859	100

When you make changes to preferences, they apply to new notifications. They will not affect any templates or scheduled messages you have already configured.

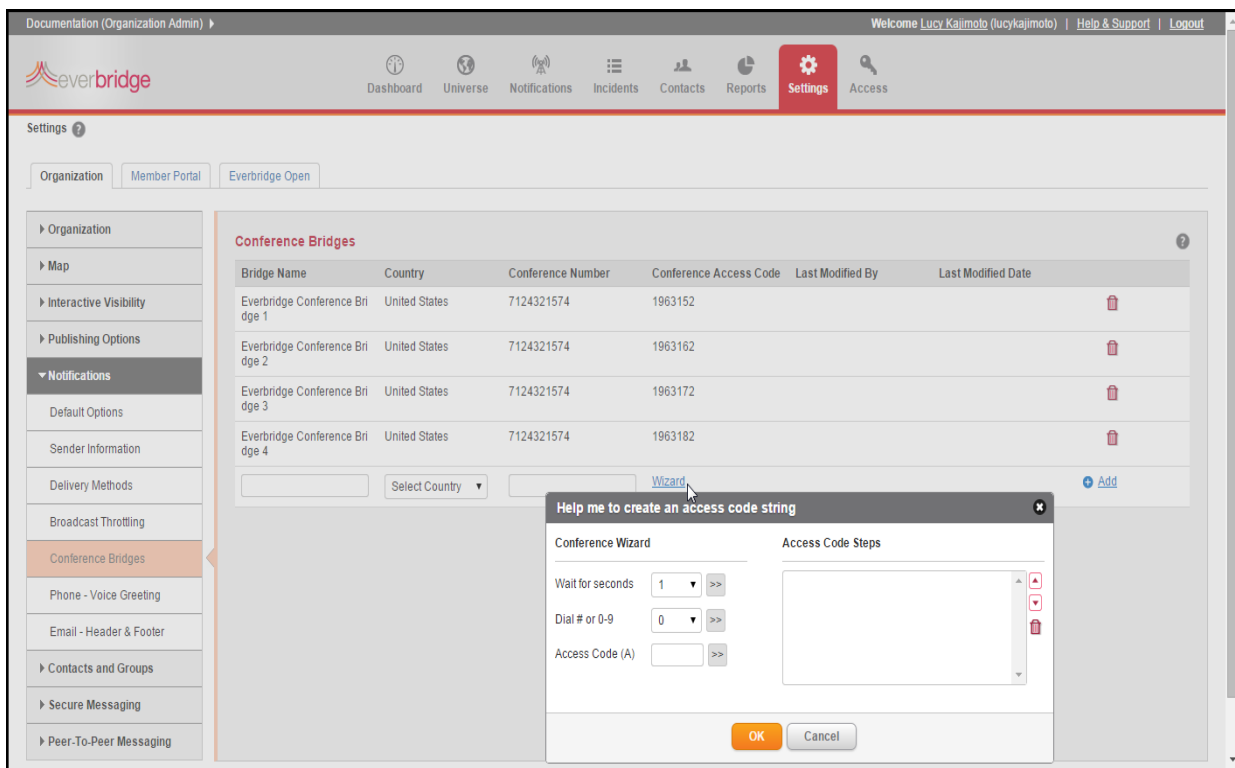


Conference Bridges

This is an optional feature.

You can use the Everbridge-provided conference bridges for your Conference notifications, or you can define your custom Conference bridges. (Additionally, you can create your own conference bridges that do not use access codes. See *Smart Conference Bridges* on page 289 of the *Incident Management User Guide*.)

NOTE: The Organization’s Settings tab offers Conference Bridges. The Account’s Settings tab does not offer Conference Bridges.



To add a custom conference bridge

- 1 **Bridge Name**—Enter the desired name for the bridge; this is the name your users will see in the list of conference bridges when preparing a notification.
- 2 **Country**—Select the country that corresponds to the location of the conference service, so the Everbridge application knows how to connect to the service.
- 3 **Conference Number**—Enter the phone number; do not include the country calling; enter the phone number in international format, that is, as if the number was being called from outside the selected country.



- 4 **Wizard**—Use the wizard to either enter the Access Code and/or the instructions for navigating the conference service menu. For instance, the conference service may require pauses and special key presses to connect the recipient to the bridge.

Example:

Assume there is a 1-second pause after you dial the conference service phone number before you hear the prompts for the menu. The conference service prompts the caller to enter the access code followed by the "#" key. The conference service then prompts the caller to confirm the access code by pressing "1". Also, assume the conference access code is "9009". Use the following steps to add the complete access code and dialing instructions.

- a **Wait for seconds**—Click ">>" to enter a "1" in the Access Code Steps box (this is the pause you experience after you dial the conference service phone number and before you hear the prompt to enter the access code).

Help me to create an access code string

Conference Wizard

Wait for seconds: 1 >>

Dial # or 0-9: 0 >>

Access Code (A): >>

Access Code Steps

1. wait for 1 second(s)

OK Cancel

- b **Access Code (A)**—Enter 9009 and click ">>" to add the Access Code to the Access Code Steps box.

Help me to create an access code string

Conference Wizard

Wait for seconds: 1 >>

Dial # or 0-9: 9 >>

Access Code (A): 9009 >>

Access Code Steps

1. wait for 1 second(s)

2. Dial access code 9009

OK Cancel

- c **Dial # or 0-9**—Select "#" from the list and click ">>" to add this character to the Access Code Steps box.

Help me to create an access code string

Conference Wizard

Wait for seconds: 1 >>

Dial # or 0-9: # >>

Access Code (A): 9009 >>

Access Code Steps

1. wait for 1 second(s)

2. Dial access code 9009

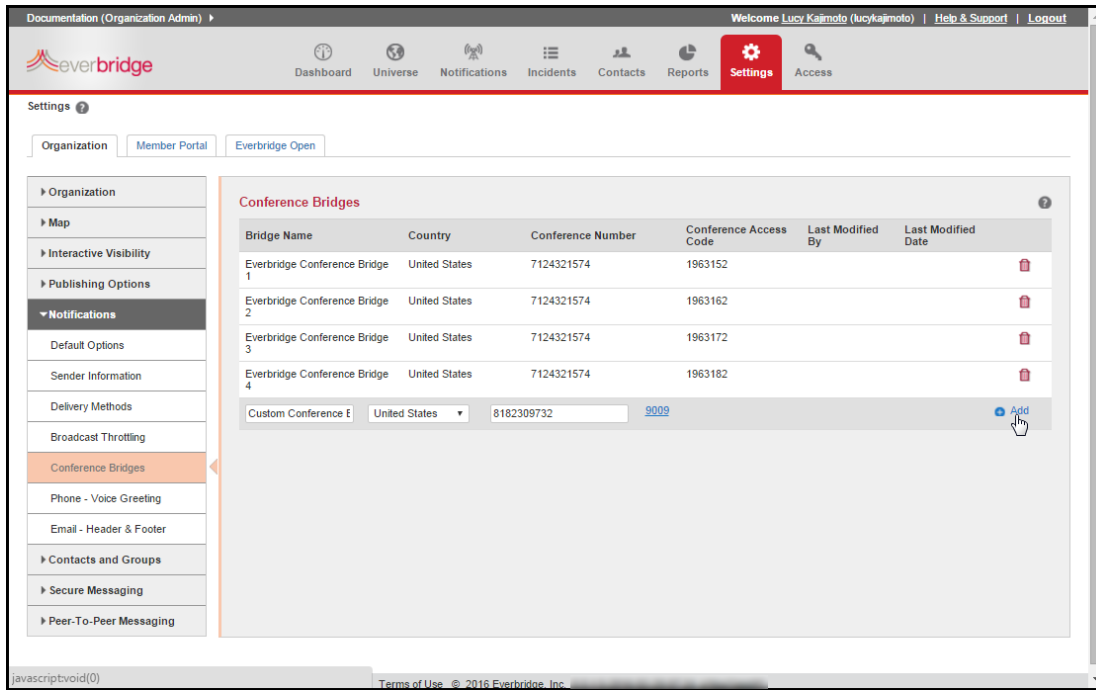
3. Dial #

OK Cancel

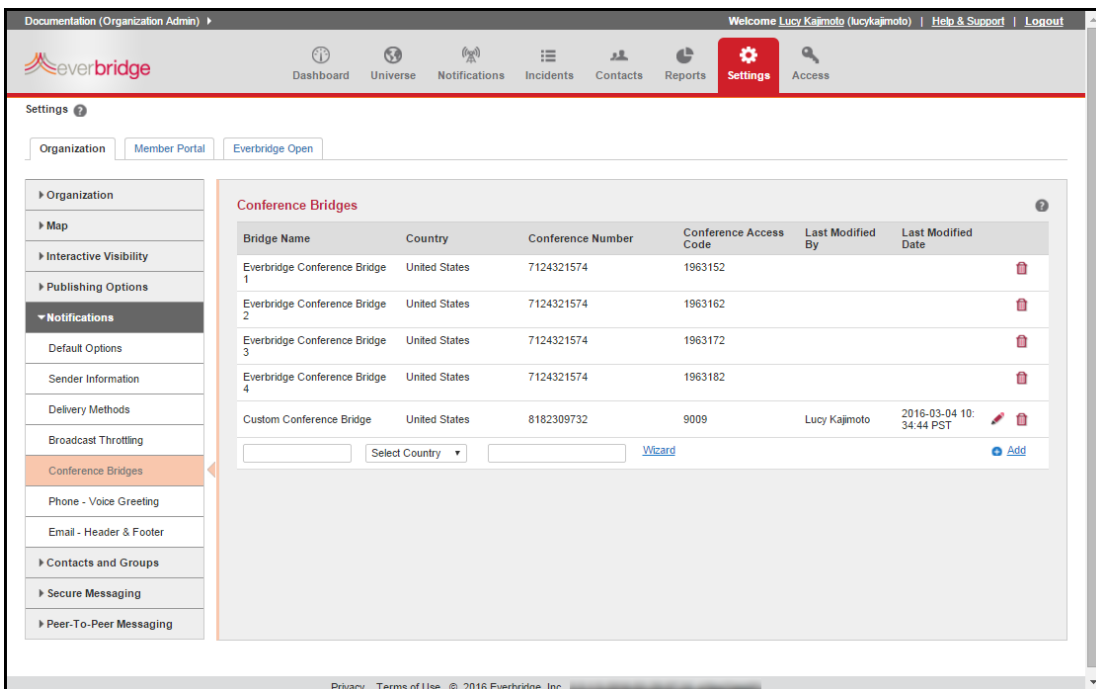
- d If needed, change the order of the steps by selecting a step and pressing the Up or Down arrows.
- e If needed, click the Trash Bin to delete a step and start again.
- f Click OK to save your access code string and close the pop-up box.



- 5 Click the “Add” link for your new Conference Bridge entry to save the new record.



Your users will now be able to select this conference bridge for the Conference notifications.



To remove a bridge that you have added, click the Trash Bin in its row. You can delete a bridge if you do not want your notification senders to have it available. Confirm the deletion.

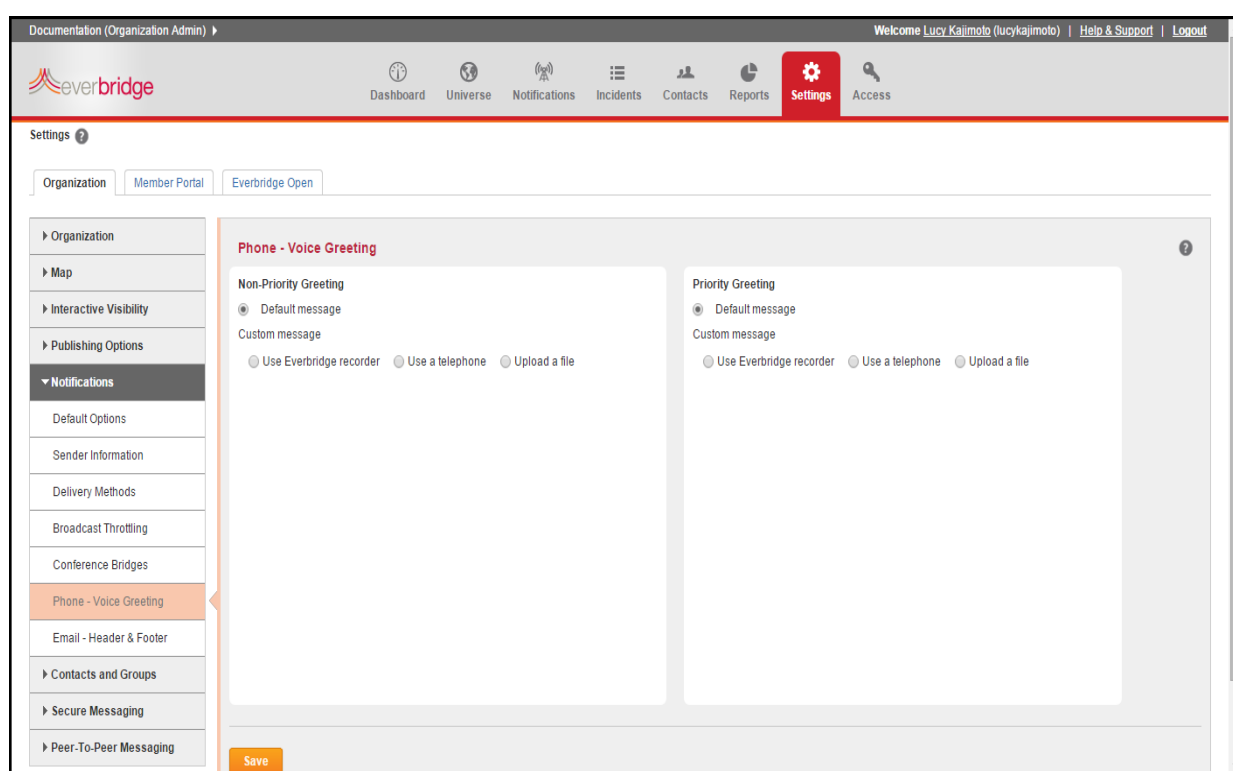


Phone - Voice Greeting

This is an optional feature.

The Everbridge application automatically plays a greeting file before delivering your notification to phone delivery methods. Everbridge provides a default greeting for Priority or Non-Priority messages in each of the languages listed in the Languages list of the Notification Settings pane.

NOTE: The Organization's Settings tab offers a Phone - Voice Greeting. The Account's Settings tab does not offer the Greetings Library.



You can add a custom greeting using one of the available options:

- ◇ **Use Everbridge recorder**—You can use the microphone on your device to record a voice file.
- ◇ **Use a telephone**—You can follow the instructions provided on the screen to call the Everbridge service to record a voice file.
- ◇ **Upload a file**—You can follow the on-screen instructions to upload a file from your computing resource. Everbridge uses a file with 8K Hz 8 bit mono mu?Law, or uncompressed PCM WAV in order to play the audio file during the phone call. Everbridge can also convert the following file formats:
 - 8K Hz 8 bit PCM
 - 8K Hz 16 bit PCM



- 8K Hz 4 bit ADPCM
- 8K Hz GSM o6.10
- 8K Hz mu-Law
- 11K Hz 8 bit PCM
- 11K Hz 16 bit PCM
- 11K Hz 4 bit ADPCM
- 11K Hz GSM o6.10
- 11k Hz mu-Law

Click Save when you have set a greeting.

At any time, you can use the default greeting with the Everbridge default greeting by selecting the radio button: Use default greeting under either Greeting Message (Non? Priority or Priority).



Email - Header & Footer

This is an optional feature.

You can insert a custom header and footer to your notifications sent via email using the Email Address 1, Email Address 2, or Email Address 3 delivery methods. If you use this feature, then the Everbridge application will insert this custom content into all email notifications, and your users do not have the option to view, edit, or disable this feature in the notification form.

When you send a message via email, the application automatically inserts your custom header and footer before sending the email to the recipient.

NOTE: The Organization's Settings tab offers Email - Header & Footer. The Account's Settings tab does not offer Email - Header & Footer

The screenshot shows the Everbridge Settings interface for an Organization Admin. The top navigation bar includes the Everbridge logo, a search icon, and menu items for Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings (highlighted), and Access. The user is logged in as Lucy Kajimoto. The main content area is titled 'Settings' and has tabs for Organization, Member Portal, and Everbridge Open. A left sidebar lists various settings categories, with 'Notifications' expanded to show 'Email - Header & Footer' selected. The main panel is titled 'Email - Header & Footer' and contains two text input fields. The top field is for the 'Email - Header' and the bottom for the 'Email - Footer'. Both fields have a rich text editor toolbar and a character count of 300 remaining.

You can add a header, a footer, or both. You can use up to 300 characters in each text box. Click Save to save changes and activate your custom content.



Contacts and Groups

At the Organization level, all Contacts and Groups are available in the menu. At the Account level, only Security is available in the menu under Contacts. See *Secure FTP* on page 164.

Contact Record Types

NOTE: The Organization's Settings tab offers Contact Record Types. The Account's Settings tab does not offer Contact Record Types.

This is a required feature.

Use the Contact Record Type to assign your contact records to major categories. This will enable you to manage your contact record separately if the records are sourced from different systems. For example, you may store your employee and contractor records on different systems.

NOTE: Since the Record Type field is required in the contact record, ensure you define the Contact Record Types before you add any Contacts to your system.

The system has one record type configured that cannot be deleted. The default value for this record type is *Employee*. If *Employee* is not a record type that your organization needs, you can change the name.

Some example record types include:

- ◇ Employee
- ◇ Contractor
- ◇ Vendor
- ◇ Visitor
- ◇ Partner
- ◇ Internal Personnel
- ◇ Citizen
- ◇ Doctor or Physician
- ◇ Nurse
- ◇ General Staff
- ◇ Faculty
- ◇ Professor or Teacher
- ◇ Student
- ◇ Parent



Record Types	Fill Color	
Employee	Red	
Opt-in	Purple	
Member Portal	Orange	
<input type="text"/>		

Names of the record types you use are custom to your organization. Add names that are meaningful to your organization and how you want to classify your contacts. The following are some examples:

- ◇ Government—Employee and Citizen
- ◇ Education—General Staff, Faculty, Student, Parent, Alumni
- ◇ Health Care—General Staff, Physician, Nurse

To add a contact record type, type a name in the text box and click Add.

To edit the name of a record type, click the Pencil icon in its row, edit the name, and click the Save icon

Click the Cancel icon to leave the record type unchanged.

To delete a record type, click the Trash Bin in its row, and confirm the deletion.

Once defined in the organization, the record types can be used to:

- ◇ Search and manage contact records based on Record Type
- ◇ Filter the target audience of any notification
- ◇ Filter search results and reporting results based on Record Type



Additional Information

NOTE: The Organization's Settings tab offers Additional Information. The Account's Settings tab does not offer Additional Information.

You can define custom data fields for filtering contact records for a notification. Examples could be:

- ◇ The location where an employee works
- ◇ The title or department of an employee
- ◇ A particular skill or certification

Click the "Add" button at the top of the page to open the "Add Fields" pane. The bottom pane shows the existing Additional Information fields for your Organization.

The screenshot shows the Everbridge Organization Admin interface. The top navigation bar includes 'Dashboard', 'Universe', 'Notifications', 'Incidents', 'Contacts', 'Reports', 'Settings' (highlighted), and 'Access'. The left sidebar shows a navigation menu with 'Additional Information' selected. The main content area displays the 'Additional Information' settings page, which includes an 'Add Fields' form and a table of existing fields.

Name	Data Type	Display Format		
Hire Date	Date	Textbox		
Company	Text	Multiple Selection List		
Department	Text	Multiple Selection List		
Street Name	Text	Textbox		
Building Number	Number	Single Selection List		
Role	Text	Single Selection List		

There are three data types available for Additional Information fields:

- ◇ Text can hold any text string
- ◇ Number must contain digits "0" to "9"
- ◇ Date must be in the date format yyyy-mm-dd

Field formats from which to choose:

- ◇ A text box allows any value to be entered. Use this format when the consistency of the value is not of importance to your users. For example, the field could be "Commute Method". In one record, a contact can enter "bus", while another contact record can enter "city bus".
- ◇ A single selection drop-down list with a list of allowed values. Use this format when you want to ensure the value for the contact record is part of your list of allowed values.



- ◇ A multiple selection drop?down list with a list of allowed values. Use this format when you want to ensure the value for the contact record is part of your list of allowed values.

There are no limits to the number of fields you can define.

NOTE: The Everbridge application does not add an empty field to a contact record if you do not define a value for the custom field in that contact record. For example, assume you have a custom field named "Work Location". If you do not populate a value for "Work Location" for Joe Smith, then the Everbridge application will not add "Work Location" to Joe Smith's contact record.

To add an Additional Information Field

- 1 Click the "Add" button at the top of the page.
- 2 **Name**—Enter the desired name for the custom field as your users will see it in the contact record under Contacts or in the Member Portal.
- 3 **Data Type**—Select the data type for the custom field.
- 4 **Display Format**—Select the display format for the custom field.
- 5 **Optional**—If the Display Format is a list, then use the boxes provided to enter all the allowed values. Use the Up and Down arrows by each value to customize where the value appears in the list.

To edit a field, click the Pencil icon in its row. Make any changes to the name or values of the field. Note that you cannot change the Data Type or Display Format. Click Update to save your changes. Or click Cancel to leave the original values.

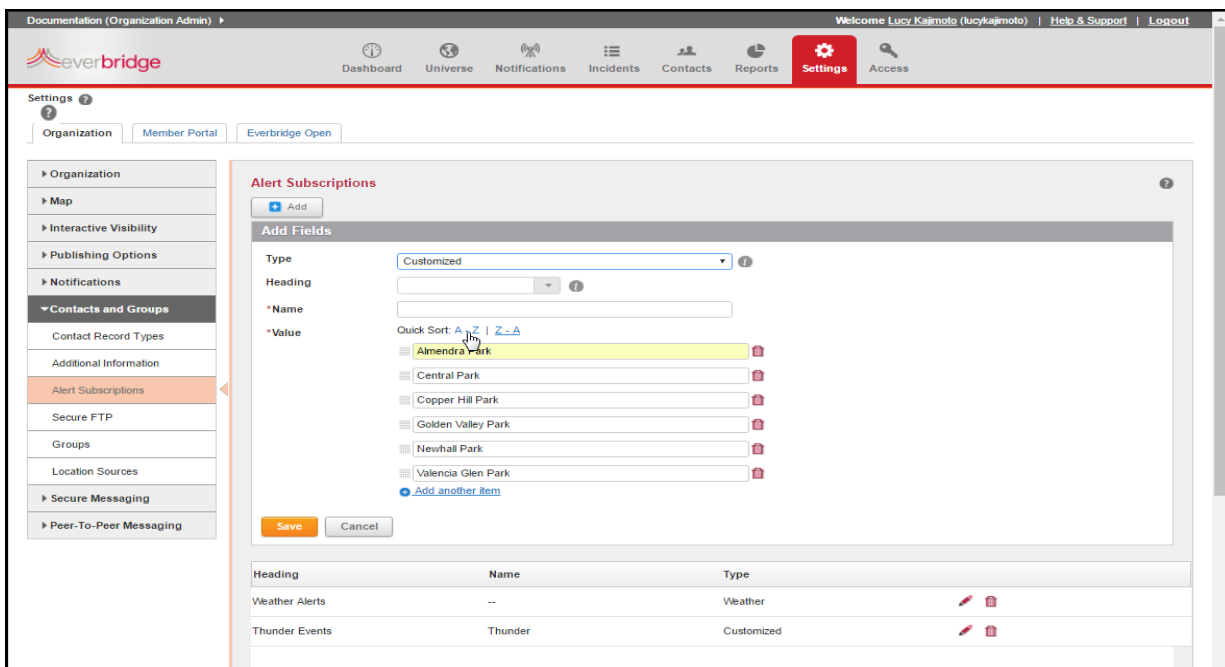
To delete an Additional Information field, click the Trash Bin in its row, and confirm the deletion. If you already have contacts that have been assigned a value for this field, then the application will remove those values from their contact records.



Alert Subscriptions

NOTE: The Organization’s Settings tab offers Subscription Fields. The Account’s Settings tab does not offer Alert Subscriptions.

You can add *types* of notifications to which the recipient (contact) can subscribe to receive notifications. These are available on the Member Portal for a contact to choose. For example, you could offer to notify contacts about several types of traffic conditions in your area. On their profiles, the contacts would select the conditions for which they want to receive notifications. Then, when you send the notification, you choose individuals who have opted-in to that type of notification. Of course for an emergency notification, you can disregard all opted-in subscriptions and send to anyone.



Select the Rules option when adding a Notification and Target Audience. By default, the values entered for the alert subscription fields are available for use.

To add a new Alert Subscription value

- 1 Click the Add button at the top of the Alert Subscriptions page.
- 2 From the Type field, select the type of field to add from the drop-down list:
 - Customized—Can have any values you choose. Type your values, as needed. Select the link: Add another item to add additional values. Optionally, select the desired Sort link: A-Z or Z-A.
 - Weather—Offers a list of predefined values for different weather conditions.



- 3 Type a name for the Alert Subscription field.
This name is shown on the Member Portal page when the contacts are making their selections.
- 4 Enter a value.
 - To enter more than one value, click the link: Add another item, and continue to enter values as needed.
 - To sort your values, click either Sort: Alpha A-Z or Alpha Z-A.
- 5 Click Save.

To edit a field, click its name in the list. Click in a text box to edit the name or values. Click Update. Click the Trash Bin next to any value to remove it from the list.

To remove an Alert Subscription, click the Trash Bin from its row in the list.



Secure FTP

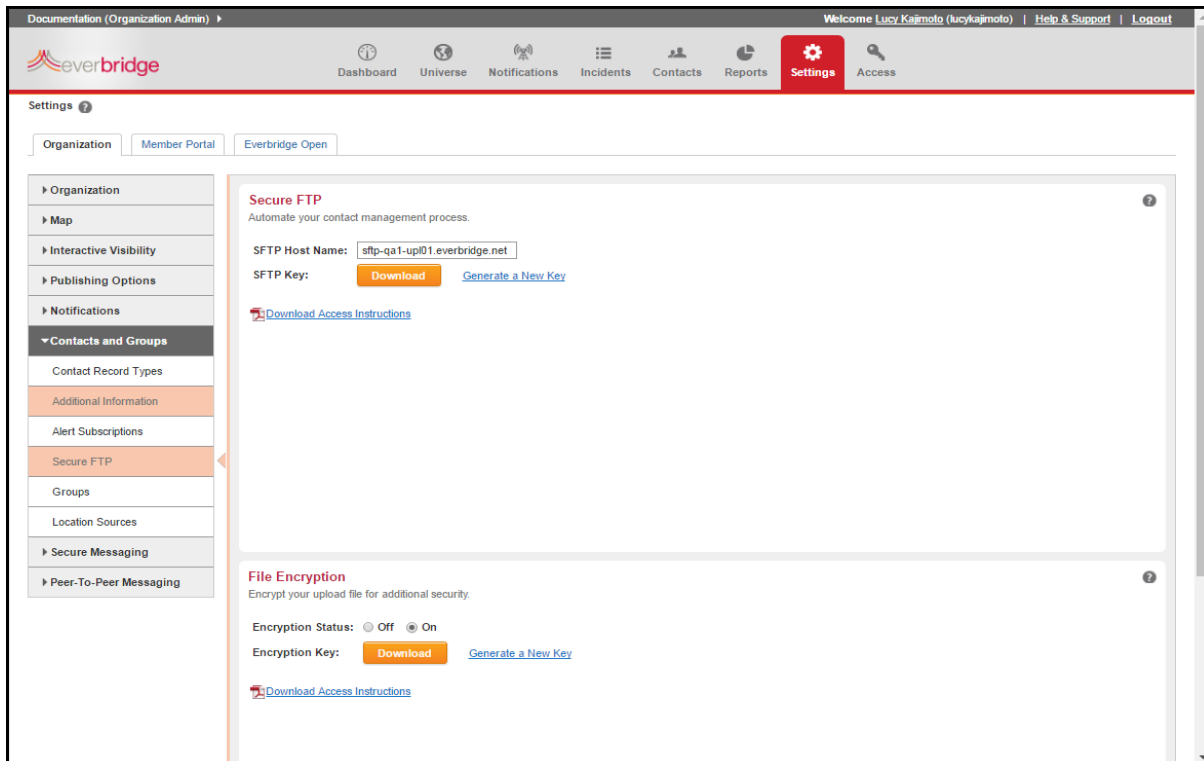
There are various ways to add contacts to Everbridge Suite.

- ◇ An administrator can fill in a form for a single contact and save it to the database.
- ◇ An administrator can use a data file containing a number of contacts and upload it to the database.
- ◇ You can configure another system to automatically add a file containing a number of contacts and upload it to the Everbridge database.

Most organizations use bulk upload methods to add and manage many contacts at once. One way to automate the upload is through the Everbridge interface. You configure your system to add a contact upload file in the Everbridge format. You then script or schedule software that supports Secure File Transfer Protocol (FTP) to upload your file to Everbridge.

Using an automated system saves time and helps to prevent errors. Note that you can use the Secure FTP software to manually upload files. This is a good way to test your connection to Everbridge and make sure that your system is configured properly. However, if you are going to upload files manually, there is no advantage to using Secure FTP software instead of simply uploading through the Everbridge Suite interface.

File Encryption provides a standard encryption method (such as PGP) to generate encryption keys.



By configuring your computer system and Secure FTP software to work together, they can automatically add contact data updates and install them. The computer system needs to add and place the data file in the location configured in the Secure FTP software. The Secure FTP software is scripted to perform the transfer.



FTP instructions are not provided in this document. If you have questions about using FTP, contact your IT department or your Client Services representative.

To use Secure FTP to upload contact data files

- 1 From the Organization tab > Organization > Base Information, note your Organization ID and the your Contact Data Store Location.
- 2 From the Organization tab > Contacts and Groups < Secure FTP, in the Secure FTP pane, click the link: Download Access Instructions. Save the file to your desktop.

NOTE: For cross-organizations, perform the Secure FTP procedure from the Account level (that is, from the Settings tab > Security > Secure FTP) rather than from the Organization level. Include the column to designate your organization names.

You will need two additional programs to use Secure FTP. Everbridge does not endorse any third-party software, but has examples using programs that others have found useful.

- 3 From the Secure FTP pane, to download the soft key (.key) file for your organization, click the button: Download. Save it to your desktop.
This soft key needs to be converted into a format that the Secure FTP software can use.
- 4 Following the Access instructions, use the key generating software to take the soft key (.key) file you downloaded and export it to a key (.pgb) file for the software.
- 5 Configure the encryption software, so you can use it to upload contact data files (.pgb).
- 6 To connect to the Everbridge server, you need to supply a *hostname*. Find the *hostname* for your Contact Data Source Location in the Access instructions. Your login username is your Organization ID.

On the server, use the following folders as destinations for your contact data file:

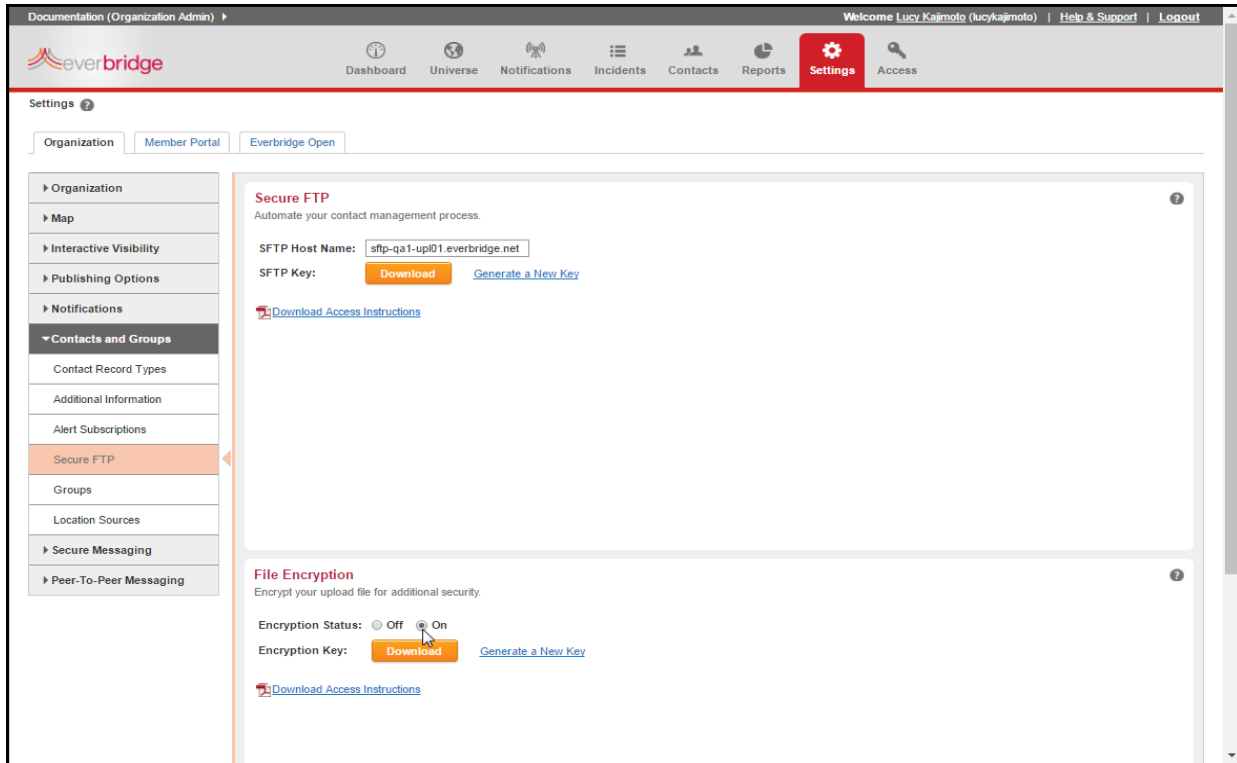
- Update - equivalent of the UPDATE option in the Upload page
 - Delete - equivalent of the DELETE option in the Uploads page
 - Replace - equivalent of the REPLACE option in the Uploads page
 - Result - the results of any upload request
 - User - Client can load CSV file containing user records to add
 - Gis - Client can load point-address file
- 7 For more information, see *step 5* on page 238 of the procedure *To upload a list of Contacts using the web-based interface*.
All Account Administrators and only Organization Administrators for the specified organization are sent an email when the Secure FTP upload is done.

NOTE: When sending a file using encryption via Secure FTP, the Results file is not encrypted.



To use File Encryption for additional security

- 1 From the Organization tab, select Contacts and Groups > Secure FTP.
- 2 From the File Encryption pane, select the Encryption Status radio button: On.

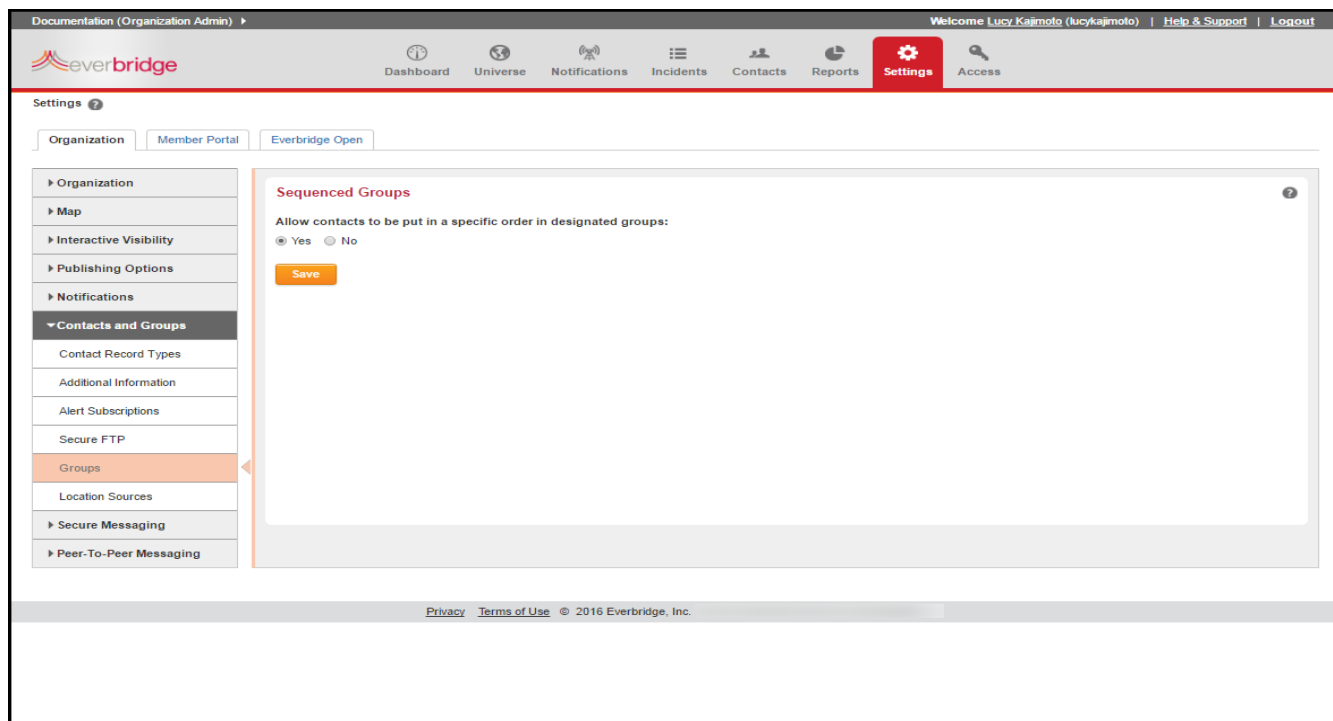


- 3 Click the link: Download Access Instructions.
- 4 Save the file to your desktop.
- 5 Follow the instructions from the downloaded file.



Groups

Groups is visible only if Sequenced Groups is enabled for your organization. Sequenced Groups allows contacts to be put in a specific order in designated groups.



Once you have selected Yes and clicked Save, from Contacts > Groups, you can order the contacts of a specific group. Later, when creating a notification, you can select this group, turn on Sequencing in the notification, and enter a wait time between contacts. (Otherwise, you would leave Sequencing off in order to use it like a standard group.)

NOTE: The Sequenced Groups feature is available only if your organization also has Incident Management enabled.



Location Sources

The Location Sources page allows you to configure sources from which dynamic locations for Contacts will get updated. These location sources can be Physical Access systems, Network Access systems, or the ContactBridge mobile application, which has the ability to send location data to the Everbridge platform.

If there is no Expiration Date and Time in the Dynamic Locations Upload, Source Wait Timespan is used for the Last Known Location records. If there is a value for Expiration Date and Time in the Dynamic Locations Upload, this value is used to keep the record valid.

If a user edits the source and changes the Valid Timespan from 8 hours to 10 hours, the records that have come into Everbridge up until that moment will still have a valid timespan of 8 hours. However, once the Source changes have been saved, the new records coming next will have a valid timespan of 10 hours.

The screenshot displays the Everbridge Administration Console interface. At the top, there is a navigation bar with the Everbridge logo and various menu items: Dashboard, Universe, Notifications, Incidents, Contacts, Reports, Settings (highlighted), and Access. Below the navigation bar, the 'Settings' page is open, showing a sidebar with a tree view of settings categories. The 'Location Sources' category is selected and highlighted. The main content area shows a table with two columns: 'Source' and 'Valid Timespan'. A single entry is visible with 'ContactBridge' in the Source column and '7 Days' in the Valid Timespan column. Below the table, there are input fields for adding a new source, including a text box for the source name, a text box for the valid timespan, and a dropdown menu for the unit (currently set to 'minute(s)'). An 'Add' button is located to the right of the input fields. The footer of the page contains links for 'Privacy' and 'Terms of Use', and a copyright notice for '© 2016 Everbridge, Inc.'

To add a new location source, enter the Source name and number of minutes, hours, or days. Then, select the link: Add.

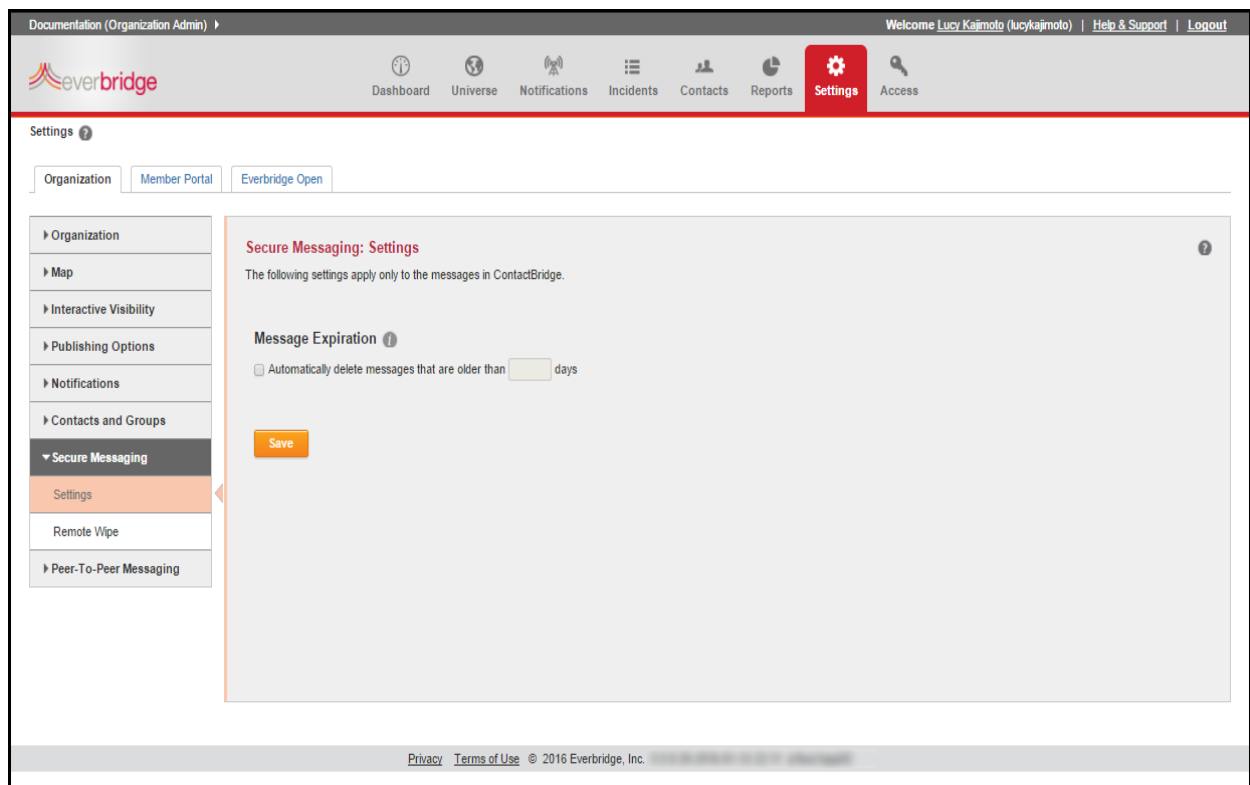


Secure Messaging

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 health care clients can use the Everbridge ContactBridge application for their Secure Messaging needs, for example.

Settings

The Secure Messaging settings apply only to the messages in the ContactBridge application. The Message Expiration feature removes (“wipes out”) all messages sent to and from the ContactBridge application after the message has been stored on all ContactBridge applications for the specified period of time. (Select the check box and enter a value of 1-180 days.)



The Remote Wipe and Logout feature wipes out all messages sent to and from the ContactBridge app for the contacts you select. These contacts will also be logged out of the ContactBridge app and will need to enter their user names and passwords again in order to receive new messages.



Remote Wipe

The Remote Wipe and logout feature removes (“wipes out”) all messages sent to and from the Everbridge ContactBridge 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 ContactBridge app. Select your contacts, click OK, confirm that the messages will be wiped out, and that the contacts will also be logged out of the ContactBridge app.

The screenshot shows the Everbridge Settings interface. The left sidebar contains a navigation menu with categories like Organization, Map, and Secure Messaging. The main content area is titled 'Secure Messaging: Remote Wipe' and includes a 'Remote Wipe and Logout' section with a 'Wipe Now' button. A 'Confirm' dialog box is displayed, asking for confirmation to wipe messages for 1 individual.

Documentation (Organization Admin) | Welcome Lucy Kajimoto (lucykajimoto) | Help & Support | Logout

Dashboard Universe Notifications Incidents Contacts Reports Settings Access

Settings ?

Organization Member Portal Everbridge Open

Organization
Map
Interactive Visibility
Publishing Options
Notifications
Contacts and Groups
Secure Messaging
Settings
Remote Wipe
Peer-To-Peer Messaging

Secure Messaging: Remote Wipe ?

The following settings apply only to the messages in ContactBridge.

Remote Wipe ?

Remote Wipe and Logout ?
Click "Wipe Now" to wipe out all messages for:

1 Individuals **Wipe Now**

Confirm ✕

You are about to wipe all messages from all instances of ContactBridge for your selected contacts. These contacts will also be logged out of ContactBridge. Do you want to continue?

Yes No

Remote Wipe

Wiped by	Date	Total Contacts	Successful Contacts	Pending
There are no items to display in this table.				

Page 1 of 1 >> 25

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The “Successful” column shows the number of messages that were wiped. The “Pending” column shows the number of messages that are yet to be wiped. That is, the mobile phone might be off or the Everbridge ContactBridge app might not be launched.

To enable a Secure Messaging user to receive notifications

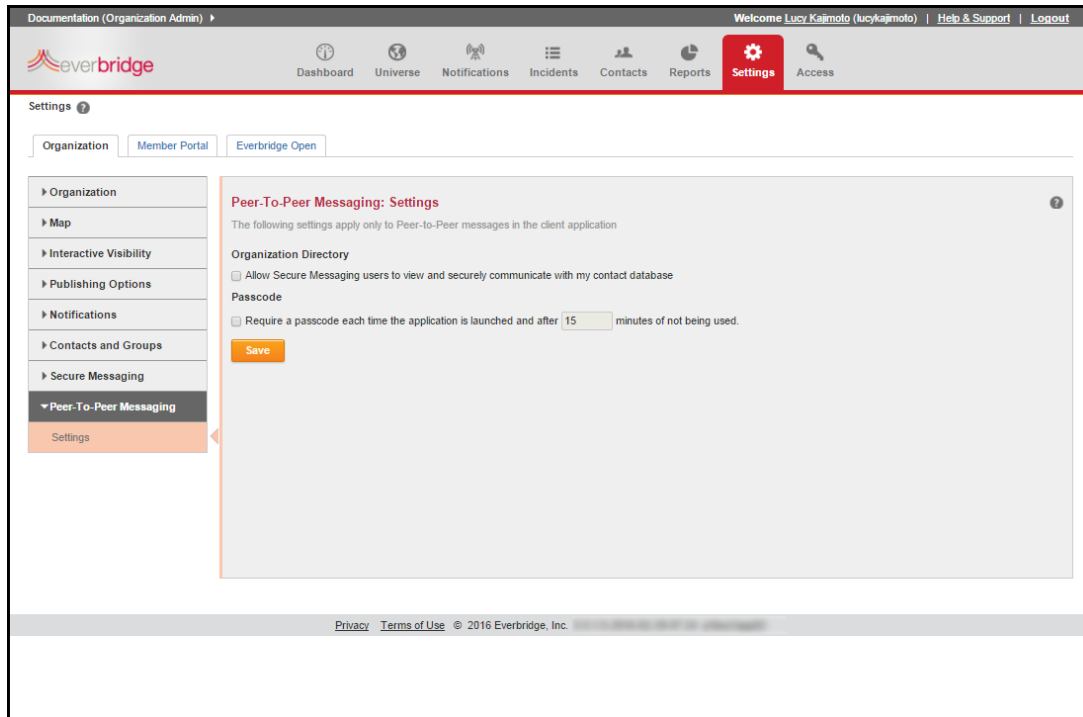
- 1 Add the user to the organization as a Contact.
Secure Messaging Users are not Contacts until you add them.
- 2 Send the contact a Member Portal Registration Invitation.
The contact joins the Member Portal with a unique username and password. Then, the contact logs in to HipaaBridge or SecureBridge with the Member Portal username and password.

NOTE: To receive notifications, the users must be logged in with their Member credentials for the organization. The users may not login using Single Sign-On (SSO) or their independent HipaaBridge or SecureBridge application credentials.



Peer-to-Peer Messaging

You can manage your secure messaging functions in the Everbridge Suite interface, which allows you to use only one application for all your Everbridge products.



These settings apply only to Peer-to-Peer messages in the client application.

- ◇ **Organization Directory**—Select the check box to allow Secure Messaging users to view and securely communicate with your (the administrator's) contact database. When the organization is enabled, the Directory icon displays in the client application.
- ◇ **Passcode**—Select the check box to require a passcode each time the application is launched, and enter the number of minutes required after the application is not used. Select Save.



Single Sign-On

At the Account level only, Account Administrators can create Single Sign-On (SSO) settings using SAML (Security Assertion Markup Language) version 2.0. The SSO applies to the Manager Portal or the Member Portal in Private mode only.

The Single Sign-On workflow for users and contacts is as follows:

- ◇ Your Everbridge representative enables “Single Sign-On” for your account.
- ◇ The customer Account Administrator configures the settings. (See *SAML Single Sign-On Settings for the Manager Portal*, next.)
- ◇ The customer Account Administrator downloads the metadata after the SSO is set and imports the metadata to the Identity Provider (IDP).
- ◇ The customer Account Administrator uploads or adds users and contacts with SSO User IDs into Everbridge Suite. To use SSO, only users and contacts with SSO User IDs are able to log in to Everbridge Suite.
- ◇ Users and contacts access the Welcome page by means of the URL provided on the SSO setting: Identity Provider Login URL.
- ◇ Users and contacts log in to the IDP service provider and are authenticated.
- ◇ Users and contacts are redirected and logged in to the appropriate accounts/roles on the respective Portal after they are authenticated.

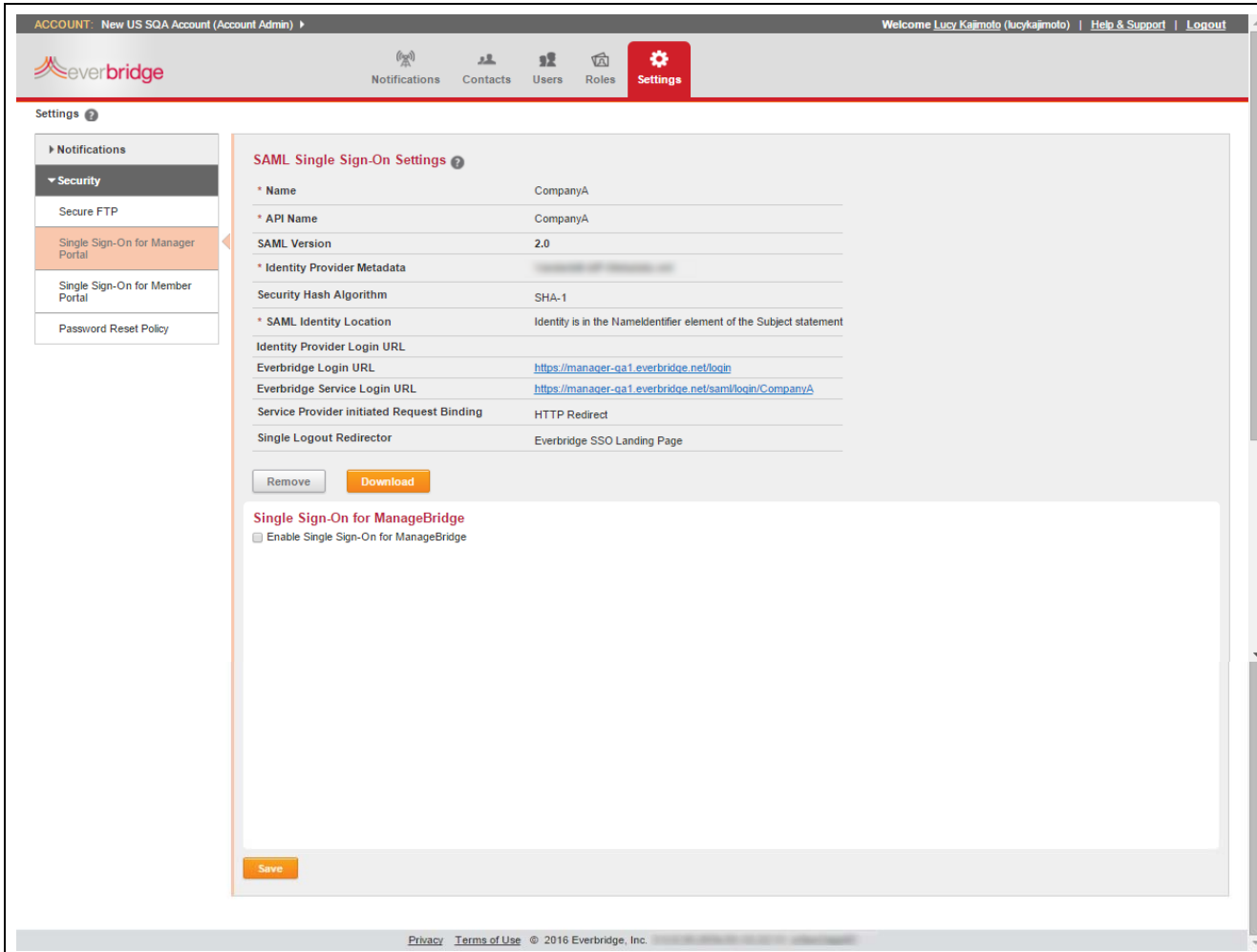
From the Account Level, select the Settings tab > Security > Single Sign-On for Manager Portal or Single Sign-On for Member Portal. The respective SAML Single Sign-On Settings page is displayed.

SAML Single Sign-On Settings for the Manager Portal

The following example shows the SAML Single Sign-On Settings for the Manager Portal. Once you have filled in the Identity Provider Metadata and Identity Provider Login URL, click Save. You can remove the metadata or download an XML file.



In addition, the Single Sign-On for Mobile Manager pane is displayed. If you select the check box: Enable Single Sign-On for Mobile Manager, a Key Phrase field appears. The Key Phrase must be 6-12 characters, and contain at least one letter and one number. Special characters are permitted, but limited to the following: !@#\$\$%^&*(). Enter your Key Phrase and click Save.



SAML Single Sign-On Settings for the Member Portal

The following example shows the SAML Single Sign-On Settings for the Member Portal. Once you have filled in the Identity Provider Metadata and Identity Provider Login URL, click Save.

The Manage Single Sign-On for Organizations (Private Only) fields are displayed at the bottom of the page. Once you have entered the values in this area, click Save and you will be able to download the Service Provider Metadata file for your organization. Click Download to download an XML file of the metadata.



ACCOUNT: test38 (Account Admin) | Welcome Lucy Kajimoto (LucyT38) | Help & Support | Logout

everbridge

Notifications | Contacts | Users | Roles | Settings

Settings ?

- Notifications
- Security
 - Secure FTP
 - Single Sign-On for Manager Portal
 - Single Sign-On for Member Portal
 - Password Reset Policy

SAML Single Sign-On Settings ?

* Name	IDP
* API Name	IDP
SAML Version	2.0
* Identity Provider Metadata	test38user-metadata.xml
Security Hash Algorithm	SHA-1
* SAML Identity Location	Identity is in the NameIdentifier element of the Subject statement
Identity Provider Login URL	
Service Provider initiated Request Binding	HTTP Redirect
Single Logout Redirector	Everbridge SSO Landing Page

Remove

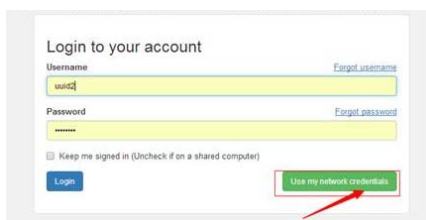
Manage Single Sign-On for Organizations (Private Only)

Organization Name	Member Portal	Mobile App	Mobile App Key phrase ?	
11lemon.org	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="12345678A"/>	Download
test38wdt10	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Download
test38wdt1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
6.0 Conference	<input type="checkbox"/>	<input type="checkbox"/>		

Save

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If you select the Member Portal check box next to the desired Organization Name, members can use their SSO User IDs to login if they select the Use my network credentials button.



Optionally, select the ContactBridge check box to make SSO enabled for the ContactBridge application for that organization. If selected, enter a ContactBridge Key Phrase. The key phrase must be 6-12 characters and contain at least one letter and one number. Special characters are permitted, but limited to the following: !@#%&*()



Use the following table to complete the required fields. Required fields are indicated with a red asterisk (*).

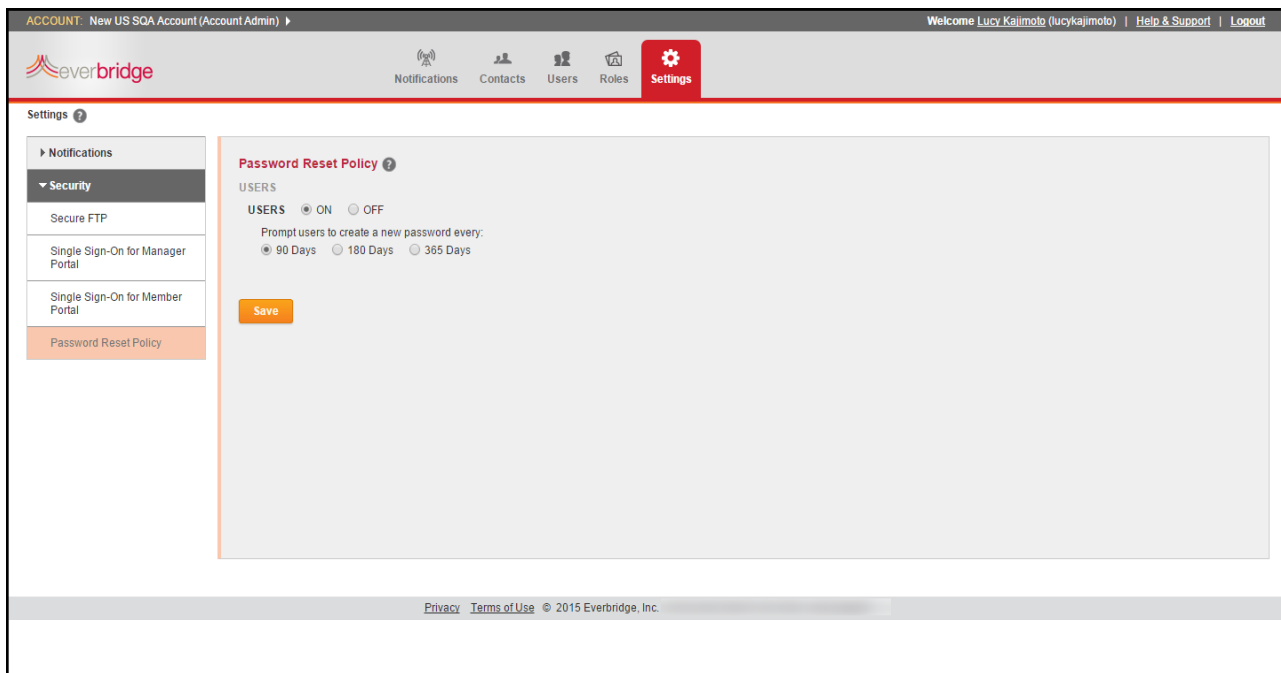
Field Name	Description
Name	Specify a name for Single Sign On settings.
API Name	The unique name used by the API, we rely on this attribute to generate "Everbridge Login URL" (below).
SAML Version	2.0
Identity Provider Metadata	Browse to the .xml file that uniquely identifies your SAML identity provider.
Security Hash Algorithm	The Hash Algorithm.
SAML Identity Location	The location in the assertion where a user should be identified. Select one of the following radio buttons: <ul style="list-style-type: none">◇ Identity is in the NameIdentifier element of the Subject statement◇ Identity is in an Attribute element—When you select this radio button, the required Attribute Name field is displayed.
Identity Provider Login URL	The URL where Everbridge sends a SAML request to start the login sequence.
Service Provider initiated Request Binding	From Single Sign-On Settings for the Manager Portal, select the desired radio button: HTTP Redirect or HTTP Post.

For assistance with SSO, contact your Everbridge Account Manager.



Password Reset Policy

At the Account level only, Account Administrators can reset the password expiration time if this feature is enabled.



By default, the Password Reset policy is set to 90 days. When the Password Reset policy is enabled, you can select 90 days, 6 months, or 1 year. Your users will receive an email reminder to reset their passwords at the end of the selected time frame. If they change their passwords before the expiration time, the count starts over from that date.

