Everbridge, Inc.

Mass Notification User Guide

QuickSheets for Roles

Version 1.0
8/11/2013

About this guide:

This guide is intended to help a novice user of Everbridge Mass Notification use the basic functionality of the system. It should work as a guide to begin to learn the system, or as a refresher to keep close at hand. This guide is not a replacement for Everbridge University training or the full User Manual. It is meant as a way to get started managing contacts, sending notifications, and to provide guidance on individual functions of the system via Role-specific QuickSheets.

Table of Contents

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QuickSheet MN: Organization Admin

Notifications

Create and send new Notification	On the **Notifications** page, click the **New Notification** button to enter the notification workflow. In the **Create Message** section, compose your message on the fly or click the link at the upper right to Use a message template, and select from the library of approved message templates. In the **Select Contacts** section, click the links to select Individuals, Groups, Rules, or Map in order to specify your target recipients. In the **Settings** section, check and update the options if needed. Click the **Send** button at the bottom to launch the notification.
Schedule new Notification	On the **Notifications** page, click the **New Notification** button to enter the notification workflow, and create your notification (as above). In the **Send & Save** section, click the radio button for **Later**, and set the date & time for your notification, then click the **Schedule** button at the bottom to schedule the notification.
Manage scheduled Notifications	On the **Notifications** page, on the **Scheduled** tab, click the pencil icon at the left of a notification to edit the notification, or click the trashcan icon to delete it.
Create new Notification Template	On the **Notifications** page, click the **New Notification** button to enter the notification workflow, and create your notification (as above). In the **Send & Save** section, click the radio button for **Save as a notification template**, assign a **Category** if desired, then click the **Save** button at the bottom to schedule the notification.
Send Notification from a Template	On the **Notifications** page, click the **Templates** tab. Use the **Search** box at the upper right if needed to find the desired Template. Click the **check-box** at the left next to one or more desired Templates, and then click the **Send** button at the top to launch the notifications.
Send Notification from Universe	On the **Universe** page, click **Select Contacts** to open the menu, and click **Draw Shapes**. Choose a tool and use it to define a region on the map: o **Free Form** – click and drag to draw your shape; release to complete the shape. o **Polygon** – click each point to define your shape; double-click the last point to complete the shape. o **Circle** – click the center point of a circle and drag to define the radius; release to complete the shape. When all shapes have been set, click the **New Notification** button at the top. Compose and launch your notification in the notification workflow panel that opens at the left (as above).
Manage active Notifications	On the **Notifications** page, on the **Active/History** tab, click the Actions link at the left of a notification. Choose an action to apply to the notification: o **Stop** – stop the notification from making any further contact attempts. o **Rebroadcast** – launch the notification again but only to the contacts who have not yet confirmed. o **Send Follow Up** – start a new notification to contacts based on how they responded to this notification.

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Contact Management

Create new Contacts	From the **Contacts** page, click the **Add Contact** button to create a new contact. In the **General Information** section, fill in the appropriate information. The **First Name**, **Last Name**, **External ID**, and **Record Type** fields are required. In the **Address Information** section, add up to five locations for the contact. After entering the street address information, select the best match from the **Select Address** drop-down list to complete the **Longitude** and **Latitude** data. In the **Contact Paths** section, select methods from the **Add a delivery method** drop-down list, and then complete the **Device Address** details for each method. Use the **up** and **down** arrows at the right of a method to adjust the order. In the **Additional Information** section, select a field from the **Add an Additional Information** drop-down list, and then complete the details for each custom field. Click the **Save** button at the bottom to save the contact.
Upload Contacts	From the **Contacts** page, on the **Uploads** tab, click the Upload to portal button to begin a bulk upload of contacts. Choose a properly formatted upload file in Comma Separated Value (.CSV) format, and click the **Upload to portal** button. Choose a method to apply the upload: o **Update** – insert new contacts and update existing contacts. o **Replace contacts with Record Type** – replace all contacts with Record Types that exist in the upload file. If a contact is not in the new file, that contact will be deleted. o **Delete** – remove the contacts listed in the upload file from the contact database. After the upload is complete you can view the results by clicking the **magnifying glass** icon on the left. This will show the number of contacts loaded without error, with error, or not loaded due to a critical error. Any errors will be listed, allowing you to make corrections to your upload file to fix the errors.
Edit existing Contacts	From the **Contacts** page, on the **Contacts** tab, click the pencil icon at the left of a contact to edit a contact. Add or update information on the contact's detail page, and click the **Save** button at the bottom.
Create and edit Groups	From the **Contacts** page, on the **Groups** tab, click the Add Group link to create a new group. Type a name for the group. Click the pencil icon at the right of a group to edit its name. Click and drag a group to move it. Drop the group on another group to make it a subgroup.
Add Contacts to a Group	From the **Contacts** page, on the **Contacts** tab, click the check-box next to one or more contacts. Click the **Add to group** button, then choose the target group from the tree and click the **OK** button.
Remove Contacts from a Group	From the **Contacts** page, on the **Groups** tab, click the group in the tree on the left to display the members of the group. Click the check-box next to one or more contacts. Click the **Remove contacts from group** button. The contacts will not be deleted from the contacts database, just removed from the selected group.

Create new Rules	From the **Contacts** page, on the **Rules** tab, click the **Add** button to create a new rule. Give the Rule a name, then define one or more criteria for your Rule by adding a **Field**, setting the **Condition**, and a **Value** to compare. **Preview** your Rule to ensure it returns the Contacts you expect, and then **Save** when satisfied.
Reports	
View Quick Reports	On the **Reports** page, choose a Quick Report from the list at left, and click the **View Report** button: o **Notification Summary** – an overall count of Notifications sent during a date range, both total by month, and by Notification type by month. o **Event Analysis** – an aggregate report on confirmation rate, both total and by path, and individual Notifications included in the selected Event. o **Detailed Notification Analysis** – detailed call results statistics and tracking of attempts over time, in five minute increments.
Create Custom Reports	On the **Reports** page, click the **Create Report** button. Select from the **Report type** box either Notifications or Contacts to choose which list of fields to build upon. Click and drag the fields you wish to include from the build list on the left. Drop fields into the **Data** section to include that field as a column. Reorder the fields by clicking and dragging up or down in the **Data** list. Remove a field by clicking the trashcan icon at the right. In order to narrow the dataset for your report, drop fields into the **Filters** section, and set the **Equation** and **Parameter** fields. Click the **Run Report** button at the bottom to generate your report. Click the **PDF** or **CSV** buttons to download your report. Give the Report a name and click the **Save** button to add it to your list of Custom Reports.
View Custom Reports	On the **Reports** page, click the link for the Custom Report you wish to view. On the **Custom Report** page, adjust any settings if needed, and click the **Run Report** button to generate your report. Click the **PDF** or **CSV** buttons to download your report.

QuickSheet MN: Group Manager

Notifications

Create and send new Notification	On the **Notifications** page, click the **New Notification** button to enter the notification workflow. In the **Create Message** section, compose your message on the fly or click the link at the upper right to Use a message template, and select from the library of approved message templates. In the **Select Contacts** section, click the links to select Individuals, Groups, Rules, or Map in order to specify your target recipients. In the **Settings** section, check and update the options if needed. Click the **Send** button at the bottom to launch the notification.
Schedule new Notification	On the **Notifications** page, click the **New Notification** button to enter the notification workflow, and create your notification (as above). In the **Send & Save** section, click the radio button for **Later**, and set the date & time for your notification, then click the **Schedule** button at the bottom to schedule the notification.
Manage scheduled Notifications	On the **Notifications** page, on the **Scheduled** tab, click the pencil icon at the left of a notification to edit the notification, or click the trashcan icon to delete it.
Create new Notification Template	On the **Notifications** page, click the **New Notification** button to enter the notification workflow, and create your notification (as above). In the **Send & Save** section, click the radio button for **Save as a notification template**, assign a **Category** if desired, then click the **Save** button at the bottom to schedule the notification.
Send Notification from a Template	On the **Notifications** page, click the **Templates** tab. Use the **Search** box at the upper right if needed to find the desired Template. Click the **check-box** at the left next to one or more desired Templates, and then click the **Send** button at the top to launch the notifications.
Send Notification from Universe	On the **Universe** page, click **Select Contacts** to open the menu, and click **Draw Shapes.** Choose a tool and use it to define a region on the map: o **Free Form** – click and drag to draw your shape; release to complete the shape. o **Polygon** – click each point to define your shape; double-click the last point to complete the shape. o **Circle** – click the center point of a circle and drag to define the radius; release to complete the shape. When all shapes have been set, click the **New Notification** button at the top. Compose and launch your notification in the notification workflow panel that opens at the left (as above).
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Create new Rules	From the **Contacts** page, on the **Rules** tab, click the **Add** button to create a new rule. Give the Rule a name, then define one or more criteria for your Rule by adding a **Field**, setting the **Condition**, and a **Value** to compare. **Preview** your Rule to ensure it returns the contacts you expect, and then **Save** when satisfied.

Reports

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QuickSheet MN: Dispatcher

Notifications

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Schedule new Notification	On the **Notifications** page, click the **New Notification** button to enter the notification workflow, and create your notification (as above). In the **Send & Save** section, click the radio button for **Later**, and set the date & time for your notification, then click the **Schedule** button at the bottom to schedule the notification.
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QuickSheet MN: Operator

Notifications

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