ALERTS USER GUIDE

inform • manage • respond

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Overview

The EmergHub Alerts feature provides organizations with a multi-channel communication tool that can be used to provide immediate notifications via email, telephone, and SMS messaging. These alerts can be sent to notify emergency officials of an ongoing event, and if used in conjunction with the available contact management tools, you are able to send out mass alerts to subscribed members of the general public.

With Alerts, you are able to send custom or pre-made notifications to targeted groups of individuals through the use of pre-made lists, selecting a geographical region from the map view, or through quick searches. You can also allow users to confirm their receipt of your notification to ensure the message reaches its target.

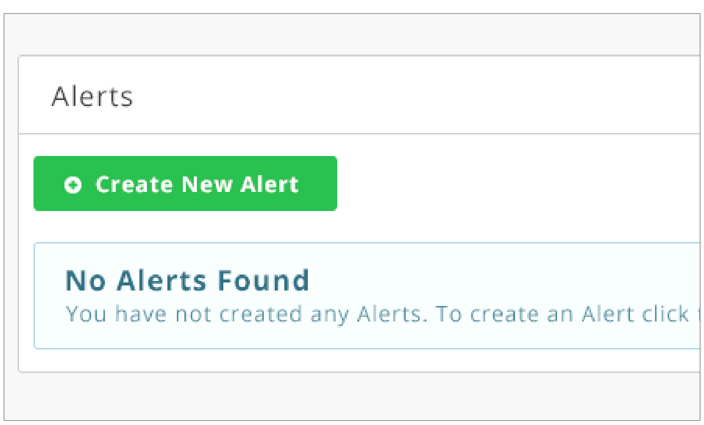
Alerts Dashboard

In order to set up and send an alert in the EmergHub platform, first you will need to go to the Alerts dashboard. In the Applications dropdown menu, locate the Alerts icon and from there, click the Dashboard icon to access the Alerts dashboard. Alternatively, you can click the pin icon to pin the Alerts icon to the top bar for easier access. Upon clicking the Dashboard icon, you will be brought to the main Alerts dashboard where you are able to create a new alert, see a list of all the alerts you have already created, the ones that have been sent out, as well as any that are pending activation. **From the Alerts Dashboard, you are able to:**

1 Create New Alert

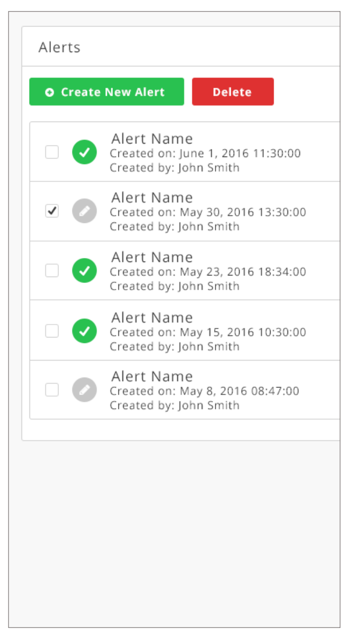
If you wish to create a new alert, there is a green Create New Alert button at the top of the Alerts Dashboard on the left-hand side.

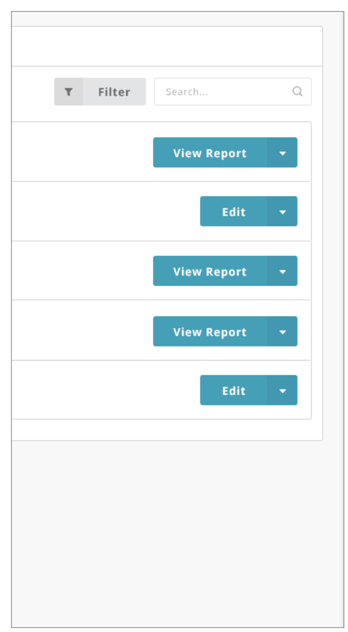
Clicking this button will direct you to the naming page where you have the ability to name the alert before moving onto the main alert creation and scheduling process. Refer to page 4 to learn how to create your alert.

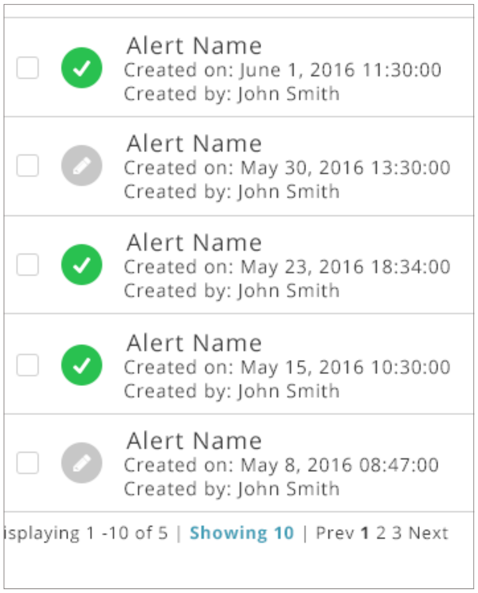


2 View the List of Alerts

Below the Create New Alert button, you will see a list of all of the alerts you have created, with the most recent appearing at the top. If there are no alerts listed, this means you have not yet created one.







3 Navigate Multiple Pages of Alerts

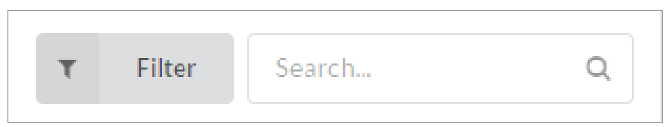
To view an alert that does not appear on the first page of the list:

- Navigate down to the bottom of your screen where you will find the page numbers indicating the total number of alerts you have created
- Click either the page number you would like to visit to proceed to another page of alerts or the Next button, which will take you to the next page of alerts
- If you know the page number you would like to go to, enter the page number in the provided field and select Go.
- Choose how many alerts to display at a time by clicking on the *"Showing..."* link located to the right of the number of displayed alerts

4 Search Alerts

If you are looking for a particular alert you have already created, you can easily search through your alerts in the list on the Alerts Dashboard by:

- Locating the search bar that appears in the top right-hand corner of the page
- Typing in the text that you would like the system to search by
- The alerts will begin to filter automatically to match the typed in text



5 Filter Alerts

To filter your list of alerts:

- Find the gray Filter button located at the top right-hand side of your screen in the main Alerts Dashboard, directly above the list of alerts, beside the search bar
- Click the Filter button and a dropdown menu will appear in which you will see two boxes that say Click to Set Date
- Click either box and another dropdown menu will show up with two fields labeled Date and Time in which you can manually insert the date and time you would like to filter alerts from
- Below these fields there is a calendar you can also use to choose the date that you would like to filter alerts from
- Click Apply to implement the filter. Or, click Clear if you do not wish to filter your alerts, which will close the dropdown menu
- The normally gray Filter button will appear green when a filter has been applied to your list of alerts. To remove the filter, click on the Filter button again and select Clear to remove all filters on your alerts

6 Edit / Delete Alerts

Once you have created alerts, they will appear in a list below the green Create New Alert button on the main Alerts Dashboard. **To edit a draft of an alert:**

- Click the blue Edit button located at the far right of the screen across from the corresponding alert name.
- Click Save and Exit at the bottom of the page to save your edits and be automatically brought back to the Alerts dashboard.

[**Note:** You are only able to edit an alert that has not already been sent out to contacts]

To delete an existing alert:

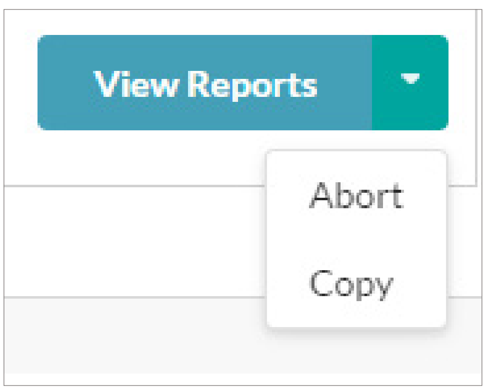
- Check off the small box that appears to the left of the alert name in the list. A red Delete button will appear that you can click to delete the alert
- Select multiple alerts at once by checking off all the alerts you wish to delete and clicking the Delete button

7 Copy / Abort an Alert

You can also copy the template of an already created alert to create a new alert easily and quickly, or abort an alert that is scheduled to send at a later date and time (but has not already been sent).

To copy an alert:

- Navigate to the far right side of the screen across from the name of the alert you wish to copy and you will either see a blue Edit button or a blue View Reports button with a downward facing arrow to the right
- Clicking this arrow will bring up a dropdown menu with the option to Copy
- Enter the name of your new alert and click OK, which will add the new alert to the Alerts Dashboard
- Or click Cancel to return to the main Dashboard without copying an alert



To abort a scheduled alert:

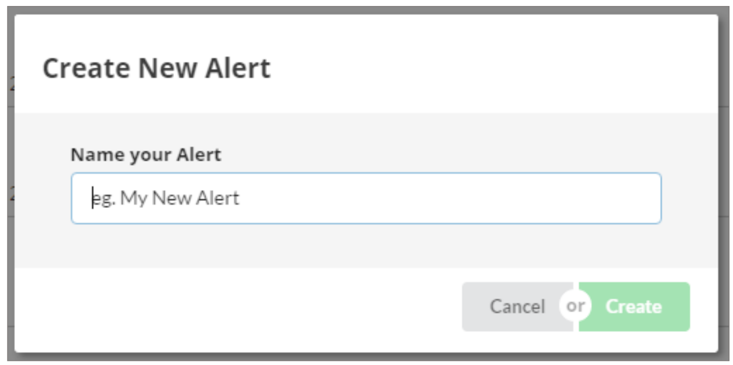
- Navigate to the far right side of the screen across from the name of the scheduled alert you wish to abort and you will either see a blue Edit button or a blue View Reports button with a downward facing arrow to the right
- Clicking this arrow will bring up a dropdown menu with the option to Abort
- Confirm that you wish to abort the alert by clicking the OK button in the pop-up that appears or click Cancel to return to the main Dashboard without aborting the alert

8 Access Alerts Reports

You can easily view the report for any alert that has already been sent out. Just like with editing an alert draft, simply choose the alert for which you would like to view a report and find the blue button to the right of the alert's name that says "View Report." Clicking this button will direct you to the main Reports page, which will display all the information received for that particular alert. For more information about Alerts reports, please refer to page 19.

Create a New Alert

Once you have clicked on the green Create New Alert button in the Alerts Dashboard you will receive a pop-up window asking you to name your new alert.



Click Create once you have named your alert to proceed to the main setup page where you can choose to create the alert for up to four different delivery methods,or click Cancel to return to the main Alerts Dashboard without creating an alert.

Alert Setup

Once you have arrived at the Alert Setup page you can create the content for up to four different alert delivery methods.

These delivery methods are:

- Email
- SMS
- Voice
- Fax

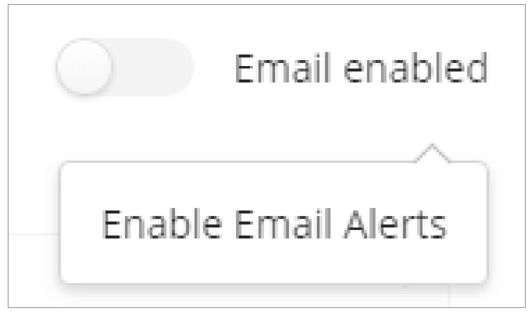
You may choose to use only one of these options, two of them, or even all four. All options appear in tabs at the top of your page. You can only configure one delivery method at a time.

Select the delivery method you wish to create an alert for by clicking on the corresponding tab found at the top of the Create Your Alert page.

Create an Email Alert

If you choose to send your alert via email:

- Select the email tab that appears on the top left of the Create Your Alert screen
- As a default, email alerts will be disabled and you will see a blue message box in the center of your screen indicating this fact
- Enable the email alert function by clicking either the blue Click to Enable button found in the message, or by clicking the Email Enabled toggle (so that it is positioned on the right and colored green) located just under the Fax tab at the top right of your screen. Once you have clicked either option to enable email alerts, you will be able to start creating your email alert message



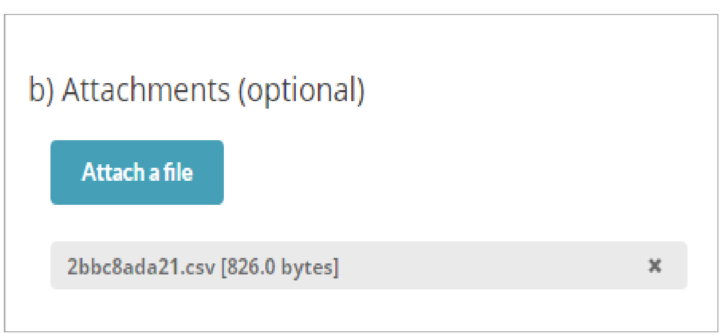
Message Content

To begin creating the content of your email alert:

- Type in the email's subject in the Subject field located below the Email Message heading
- Choose the sender email address that you would like the email alert to be sent from in the Sender field dropdown menu to the right of the Subject field

[**Note:** If there are no options available in the dropdown menu, or you would like to use a different email address, click on your account number found in the very top right-hand corner of your screen and select Account Information. From here, click on the Sender Addresses option in the sidebar. This will bring you to a page where you can add a new sender address by clicking the green New button that appears at the top of the screen.]

- Write out the content of your alert in the text box located below the Subject line
- Click the blue Attach a File button if you would like to add an attachment to your email alert
- Choose the file you wish to attach to the alert from your device
- Delete an attachment by clicking the "X" button to the right of the attachment name



Confirm Receipt of Alert

At the bottom of the Email Alert page, you must then choose whether you need recipients to confirm that they have received the alert, by requiring them to click on a link that will be placed in the email.

Clicking this link will open a browser window where they can confirm they have received the alert.

To enable the (optional) Confirm Receipt function, click the toggle that appears to the right of the Confirm Receipt of Alert section, making sure that it is positioned to the right and colored green.

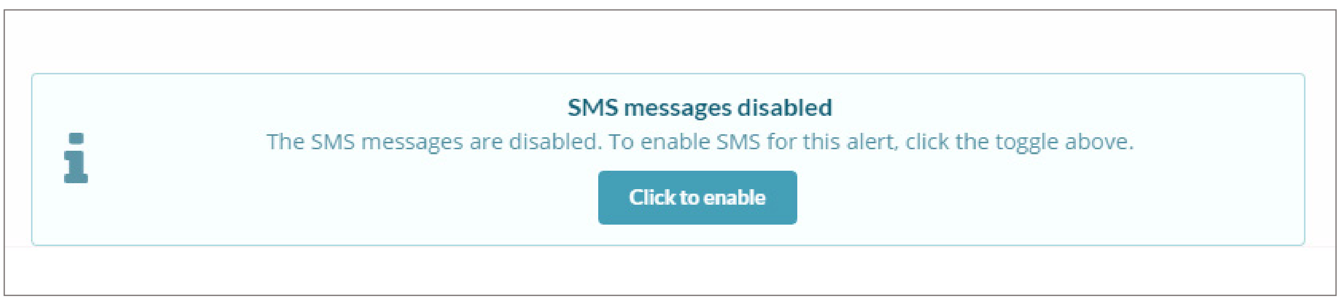
Once you have finished writing the content of your email alert and have it configured the way you want, you may click the Next button on the bottom right of your screen to proceed to the next stage of the alert creation process. Or, you may select another delivery method from the four tabs at the top of the screen to begin configuring an alert for that delivery method.

Create an SMS Alert

If you choose to send your alert via SMS:

- Select the SMS tab that appears on the top of the Create Your Alert screen
- As a default, SMS alerts will be disabled and you will see a blue message box in the center of your screen indicating this fact
- Enable the SMS alert function by clicking either the blue Click to Enable button found in the message, or by clicking the SMS Enabled toggle (so that it is positioned on the right and colored green) located just under the Fax tab at the top right of your screen

Once you have clicked either option to enable SMS alerts, you will be able to start creating your SMS alert message.



Message Content

To begin creating the content of your SMS alert:

- Type the body of the alert into the text box that appears once you have enabled the SMS feature
- You can add merge tags at any point to your alert by selecting the tag you would like to include from the Merge Tags dropdown menu and clicking “Add.” You will then see the tag in the text box containing your message so that you can adjust the placement if you would like.

- Be aware of the number of characters your message contains. There is a limit of 140 characters per SMS message and exceeding this amount means multiple SMS messages will be required to send the SMS alert
- Navigate to the bottom of the SMS body text box you will see the number of characters you have already used and the estimated number of SMS messages required to send the entire message

Confirm Receipt of Alert

At the bottom of the SMS Alert page, you must then choose whether you need recipients to confirm that they have received the alert, by requiring them to respond to the text message with a keyword that was provided in the original alert.

To enable the (optional) Confirm Receipt function, click the toggle that appears to the right of the Confirm Receipt of Alert section, making sure that it is positioned to the right and colored green.

Once you enable this toggle for one of the channels, the feature will automatically be enabled for all channels that possess the capability, therefore the toggle may already be shifted to the right and green in color.

Once you have finished writing the content of your SMS alert and have it configured the way you want, you may click the Next button on the bottom right of your screen to proceed to the next stage of the alert creation process.

Or, you may select another delivery method from the four tabs at the top of the screen to begin configuring an alert for that delivery method.

Creating a Voice Alert

If you choose to send your alert via voice:

- Select the voice tab that appears on the top of the Create Your Alert screen
- As a default, voice alerts will be disabled and you will see a blue message box in the center of your screen indicating this fact
- Enable the voice alert function by clicking either the blue Click to Enable button found in the message, or by clicking the Voice Enabled toggle (so that it is positioned on the right) located just under the Fax tab at the top right of your screen

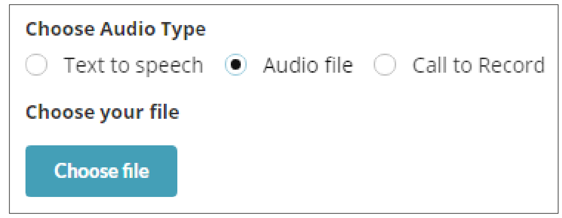
Next, you must choose your audio type for your voice alert from three options:

1 Text-to-Speech

This option lets you type out the voice alert you wish to send and have it converted into an automated voice recording. Type out your message in the text box provided and the system will translate it to a voice when the alert is deployed. You can also add merge tags by selecting the tag you would like to include from the Merge Tags fromdown menu and clicking “Add.”

2 Audio File

This option lets you either choose a pre-recorded audio file from your device to upload to the EmergHub platform, or provide a phone number that the system will call to allow you to record a new message on the spot. When you select the Audio File option, a blue Choose File button will appear below the options. Click this button if you wish to pick a file to upload from your device. Acceptable file formats include WAV, MP3, and M4A.

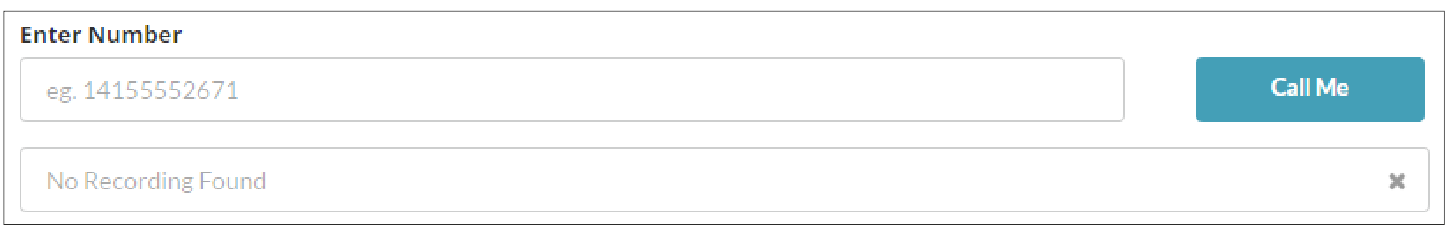


3 Call to Record

This option lets you record a new voice message on the fly by allowing the platform to phone you and record the message right then.

To use the Call to Record feature:

- Select the Call to Record option from the three available Audio Type options in the Voice Message section of the page
- Once selected, below the Audio Type options you will see two fields and a blue Call Me button. Enter your phone number in the Enter Number field and then click the Call Me button. You will receive a phone call shortly afterward prompting you to recite the message you wish to record
- The field below the Enter Number field is where your recording will be saved once you have finished recording it on your phone. Click the "X" that appears in the far right of this field if you wish to delete the recording



Once you are happy with your voice alert message, below this section you can configure the message settings of the alert.

To do this:

- Select how many redials you would like to give the voice alert from the dropdown menu provided. Redials are made when the alert recipient does not answer their phone for the initial alert. The maximum number of redials is 5
- From the Wait Time Between Redials dropdown menu, determine the wait time (in increments of 15 seconds) between redials that you would like the system to adhere to before redialing the recipient's phone number. The maximum number of seconds between redials is 60.

Confirm Receipt of Alert

At the bottom of the Voice Alert page, you must then choose whether you need recipients to confirm that they have received the alert, by pressing a number on their dial pad based on a menu given at the end of the voice alert. To enable the (optional) Confirm Receipt function, click the toggle that appears to the right of the Confirm Receipt of Alert section, making sure that it is positioned to the right and colored green.

Once you enable this toggle for one of the channels, the feature will automatically be enabled for all channels that possess the capability, therefore the toggle may already be shifted to the right and green in color.

Once you have finished writing the content of your voice alert and have it configured the way you want, you may click the Next button on the bottom right of your screen to proceed to the next stage of the alert creation process. Or, you may select another delivery method from the four tabs at the top of the screen to begin configuring an alert for that delivery method.

Creating a Fax Alert

If you choose to send your alert via fax:

- Select the fax tab that appears on the top of the Create Your Alert screen
- As a default, fax alerts will be disabled and you will see a blue message box in the center of your screen indicating this fact
- Enable the fax alert function by clicking either the blue Click to Enable button found in the message, or by clicking the Fax Enabled toggle (so that it is positioned on the right) located just under the Fax tab at the top right of your screen

Once you have clicked either option to enable Fax alerts, you will be able to proceed with the Fax alert setup.

Fax Type

The first section in the Fax alert setup is where you must choose the type of fax you would like to send. There are two fax types to choose from:

1 PDF

If you choose to send your fax from a PDF document:

- Select the PDF option under the Choose Fax Type section
- A blue Choose File button will appear below the Fax Type options that you must click in order to upload the PDF document from your device
- When you click the Choose File button, a popup will appear on the screen where you can browe the files on your device and locate the PDF document you would like to upload. Once you find the document, double-click it to upload it to the system.

2 HTML

If you choose to create a fax using HTML:

- Select the HTML option under the Choose Fax Type section
- A text box will appear allowing you to type out your fax message using basic formatting tools

Message Settings

Once you have either uploaded or created your fax alert message, you must then set up the message settings.

To complete the Message Settings section:

- Determine the number of redial attempts you would like the system to make in the event of a sending failure from the dropdown menu in the Redial Attempts field. The maximum number of redial attempts is 5
- Next, type the phone number that the fax will be received from into the Sender Number field that is located in the middle of the three fields in the Message Settings section
- Then, type in the name of the person who the fax will be from into the Sender Name field found to the right of the Sender Number field

Confirm Receipt of Alert

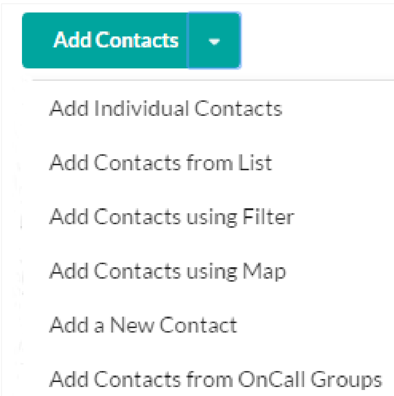
At the bottom of the Fax Alert page, you will see the Confirm Receipt of Alert section. This section is common to each delivery channel, however the Fax channel does not have the feature available.

Once you enable this toggle for one of the channels, the feature will automatically be enabled for all channels that possess the capability, therefore the toggle may already be shifted to the right and green in color.

Selecting Your Alert Contacts

Once you click Next from the Create Alert page, you will be directed to the Select Your Contacts page. Here is where you can choose who will receive your alert.

To select your contacts, click the blue Add Contacts button and a dropdown menu will appear with six methods to choose your contacts:



- Add Individual Contacts
- Add Contacts From List
- Add Contacts Using Filter
- Add Contacts Using Map
- Add a New Contact
- Add Contacts from OnCall group

Add Individual Contacts

To manually add individual contacts:

1. Choose Add Individual Contacts from the blue Add Contacts button's dropdown menu
2. Type in the contact's name in the field provided in the sidebar that appears to the right of your screen
3. The list of contacts will automatically be filtered as you begin typing the contact's name
4. Click on the contact name you wish to add once it appears in the filtered dropdown
5. Continue adding contacts manually without closing the sidebar
6. Click the Add Contacts button at the bottom of the sidebar once you have all your contacts
7. Click the Cancel button to close the sidebar without adding any contacts

Add Contacts from List

To select your alert contacts based on pre-defined lists found in your Contact Manager:

1. Choose Add Contacts from List from the blue Add Contacts button's dropdown menu
2. A sidebar will appear on the right-hand side of your screen where you can choose which list(s) you would like to send the alert to
3. The list options will automatically be filtered when you begin typing the name of the list you want in the field provided
4. Continue adding lists this way without closing the sidebar
5. Click the blue Add Contacts button at the bottom of the sidebar once you have your contacts, or Cancel to close the sidebar without choosing a list

Add Contacts Using Filter

To choose your contacts through the use of advanced filters:

1. Choose Add Contacts Using Filters from the blue Add Contacts dropdown menu
2. A sidebar will show up to the right of your screen, where you will be asked whether you would like to choose your contacts from:
   - **All Contacts:** This option allows you to filter your contacts from your entire contact database
   - **Lists:** This option lets you filter your contacts from selected lists of contacts in your Contact Manager. If you choose to select your contacts using lists, you will see the option to choose your list(s) in the dropdown menu provided
   - **Saved Filters:** This option lets you filter your contacts through a previously saved filter you created. If you choose the Saved Filters options to select your alert recipients, you will be provided with a dropdown menu allowing you to choose from a list of saved filters. If you wish to create a new saved filter, you can type in the name you wish to call it in the Name field found under the Saved Filters dropdown and click the blue Save Filter button
3. After choosing a filtering method, proceed to the "Filter Contacts by" section further down in the sidebar
4. Here, you are able to filter your contacts by column type, column name, and value. "Column" refers to each contact's profile in the Contact Manager and the fields of information found therein

Column Type: This option refers to the type of column found in the contact's Contact Manager profile.

There are five options in the Column Type dropdown menu:

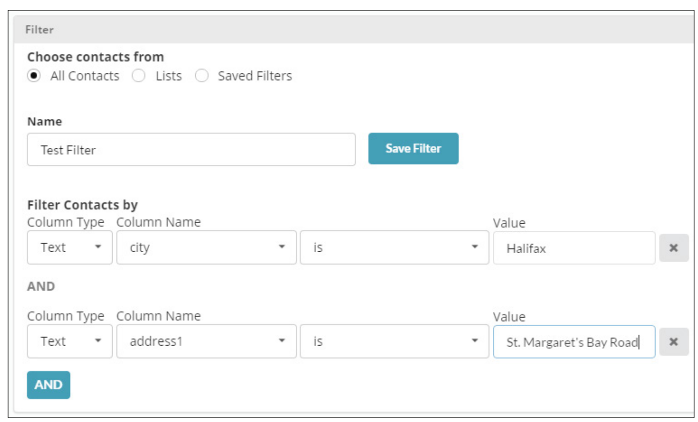
- **Date and Time:** Selecting the date option as your column type will give you different options in regard to the column name. In the **Column Name** field (the information fields found in the profile within each column type), you are given the choice between when the contact was created or when the contact was last modified. These options refer to the date in which the contact's profile was either created or changed in the Contact Manager
- **Email Address:** Selecting email address as your column type gives you only the "Email" Column Name option. This refers to the email address of the contact(s) you would like to add as your alert recipients.
- **Location (Lat, Long):** Selecting this option as your column type gives you only the "Location" Column name option. This refers to the geolocation of the contact(s) you would like to add as your alert recipients.
- **Phone Number:** Selecting the phone number option as your column type will give you three options in the Column Name field: fax, mobile, and phone. From this field you will select whether you are searching for the contact by their fax number, mobile number, or phone number, then enter the number in the Value field.
- **Text:** Selecting the text option as your column type gives you multiple options as to selecting a column name. Text refers to a particular row of information in the contact's Contact Manager profile.
  Options in the Column Name field include:
  - Address 1
  - Address 2
  - Preferred method

- Salutation
- Company
- Title
- Mobile
- Phone
- City
- State
- Fax
- Zip
- Source
- Country
- Twitter
- Name

5. Choose your column type and name through which you would like your contacts to be filtered
6. Adjust your filtering parameters by selecting from the dropdown of options in the field directly to the right of the Column Name field. **These options include:**
   - Contains
   - Is equal to
   - Is less then
   - Starts with
   - Doesn't contain
   - Is greater than
   - Is less than or equal to
   - Ends with
   - Is greater than or equal to
   - Is not equal to
7. Insert a value into the Value field to determine how the contacts are being filtered

Value: Once you have selected a parameter option, you must then insert a value into the Value field on the right-hand side of the sidebar. The value indicates what information the contact must possess or not possess to be included as a recipient of your alert.
For example, say you would like everyone whose Contact Manager profile says that they live in Halifax, Nova Scotia to receive a particular alert. **To do this:**

- Select "Text" as your column type
- Select "City" as your column name.
- Select "is" as your parameter
- Input "Halifax" as your value, since you wish only those who reside in Halifax to receive the alert
- The filter would look like this: *Text > City > Is > Halifax*



You are able to set up multiple filter options by clicking either the And or Or buttons, which will add a field.

Choosing "And" will cause the filtering process to look at both of these filter options and only send the contact the alert if they meet the parameters of both filter options.

For example, say that in addition to living in Halifax, in order for a contact to receive your alert, they must also live on St. Margaret's Bay Road. To demonstrate this example:

- Select the "And" button to create a new field below the first filter
- Select "Text" as your column type
- Select "Address1" as your column name

- Select “Is” as your parameter
- Insert “St. Margaret’s Bay Road” as your value.
- Adding to the first filter option we created, the new filter would look like this: *Text> City > Is > Halifax* **AND** *Text> Address1 > Is > St. Margaret’s Bay Road*

Now, only those contacts in your Contact Manager who live in Halifax and on Saint Margaret’s Bay Road will receive your alert. On the other hand, choosing “Or” will cause the filtering process to look at the two filter options and if at least one of them applies to the contact, they will be sent the alert.

For example, we will start with the first filter we applied where wanted to send the alert to contacts who live in Halifax. However, we also want the contact to receive the alert if they work for Company XYZ.
To create this new filter option:

- Select the “Or” button to create a new field below the first filter
- Select “Text” as the column type
- Select “Company” for the column name
- Select “Is” as the parameter
- Input “XYZ” as the value
- Now, the new filter will look like this: *Text > City > Is > Halifax* **OR** *Text > Company > Is > XYZ*

This means that any contacts in your Contact Manager that are listed as living in Halifax, or who may not necessarily live in the city but who work for company XYZ, will receive the alert.

Once you have determined which contacts you wish to receive your alert, you can close the sidebar by clicking Add Contacts at the bottom of the sidebar or click Cancel to close the sidebar without choosing any contacts.

Add Contacts Using Map

There are two ways to add contacts from specific geographic areas:

[**Note:** In order to add contacts using map, you must have the contact’s latitude and longitude location information registered in their Contact Manager profile.]

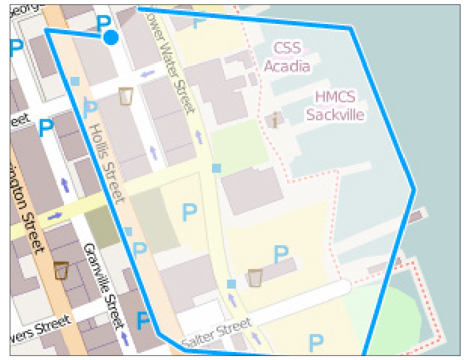
[**Note:** You must have Map permissions enabled in your account to be able to select contacts using the Map feature. Refer to the Account Networks User Guide for more information about permissions.]

1 Draw a New Region

This option allows you to create a new region on a map to send the alert to the contacts who live specifically in that area. Select the Add Contacts Using Maps button from the Add Contacts button’s dropdown menu and a sidebar with a map will appear from the right side of your screen.

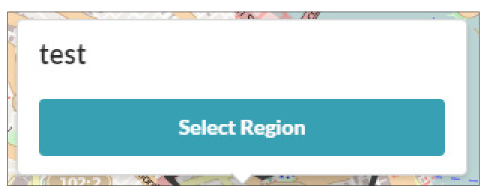
Locate the three blue buttons located on the far left of the map, one with a white arrow, one with a paintbrush, and one with a funnel. Clicking the arrow button will allow you to click and drag on the map to change your position, the paintbrush button allows you to draw new regions on the map, and the funnel button allows you to filter the information you see on the map.

To zoom in and out on the map, locate and click on the “+” and “-” buttons found at the top left-hand corner of the map.



To create a new region on a map:

- Determine the area on the map where you would like to select your contacts from
- Click the blue paintbrush button on the left side of your screen, which will activate a blue dot at the end of your mouse
- Click on the map where you would like to begin drawing the region and a point will be marked. When you move your mouse a line will extend from the first point you clicked on the map
- Continue to click your mouse to create more points on the map until you come back to the original point, creating a new filled-in region
- Once the region is filled in, a new sidebar will appear asking you to choose an entity to associate with the region from the Entity dropdown menu. If there are no entities available, you will have to create a new entity in the Blueprints module. Refer to the Blueprints User Guide for more information on how to create a new entity
- If you are able to choose an entity, you may see other fields appear below the Entity field in this sidebar. Fill out these fields and click the blue Save button to save the new region, or the Cancel button to close the sidebar without saving your region
- When you have finished creating and naming your region, you may see another pop-up appear if the entity layer on the map has been hidden from view, asking if you would like to show the layer. If you see this pop-up and wish to view the map layer with the new entity, click the blue OK button
- Now you can click on the region to select it as part of your alert contact set. Click the blue Select Region button and the region will be added to the sidebar on the right. Once you have added all the regions you want to the sidebar, click the blue Confirm button at the bottom right of your screen to return to the alert setup process, or click Cancel to return to the setup process without selecting any regions



② Select an Existing Region

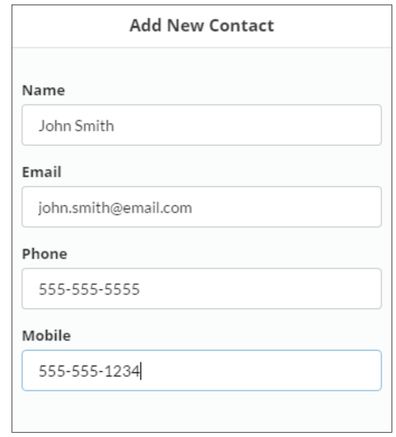
This option allows you to select a previously-created region on your map to choose your contacts from. When you select the Add Contacts Using Map option from the Add Contacts dropdown, the map will open from the right side of your screen.

To select an existing region on a map:

- Locate the region on the map where you would like to select your contacts from
- Click on the region, which will bring up a pop-up with a blue button that says Select Region
- Clicking this button will add the region to the list of selected regions in the sidebar at the right of your screen

- Continue to add regions this way until you have added all the contacts you wish to send alerts to
- Click the blue Confirm button found at the bottom right-hand side of your screen to add these contacts, or click Cancel to close the map view and select another way of adding contacts to receive your alert

Add a New Contact



To add a new contact who isn't already in your Contact Manager to the list of alert recipients:

- Select the Add a New Contact button from the Add Contacts button's dropdown menu
- A sidebar will appear to the right of your screen allowing you to enter the name, email, phone number, and/or mobile phone number of the new contact
- Click the green Create and Add Contact button at the bottom of the sidebar to close the window or Cancel to return without adding the contact
- As well as being sent the current alert, the new contact you added will also be added to your Contact Manager where they will be available to be selected to receive any future alerts

Add Contacts From OnCall Groups

To add contacts from one of your OnCall groups:

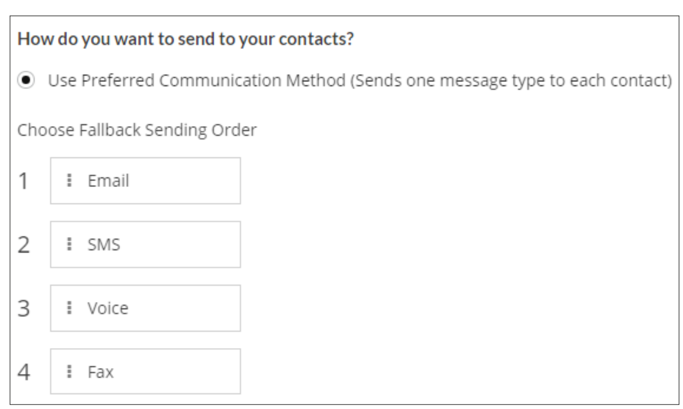
- Select the Add Contacts From OnCall Groups button from the Add Contacts button's dropdown menu
- A sidebar will open to the right of your screen with a field where you can select the OnCall group(s) you would like to send your alert to from the dropdown menu of options
- Continue adding groups this way without closing the sidebar
- Click the blue Add Groups button at the bottom of the sidebar once you have all the contacts you are looking for, or click Cancel to close the sidebar without choosing your contacts

Select Alert Sending Method

The sending method refers to the channel through which you would like to send your alert.

These methods include:

- Email
- SMS
- Voice
- Fax



There are two choices for how the system can send your alert to your contacts:

- Use Preferred Communication Method
- Send All Created Messages

1 Use Preferred Communication Method

By choosing to send your alert via a contact's preferred method of contact, this means that the alert will be sent through the channel that the contact has indicated they would like to receive messages from.

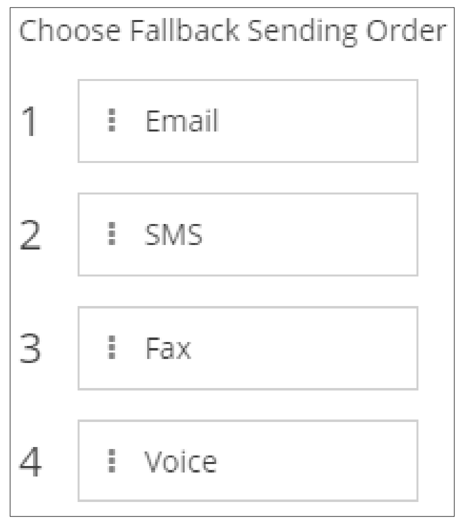
Each contact's preferred method (if provided) is noted in their personal Contact Manager profile.

To choose to send the alert to your recipients' preferred methods:

- Click on the radio button found next to the Select Preferred Communication Method option, underneath the Select Sending Method header
- Determine the Fallback Sending Order

Fallback Sending Order

The fallback sending order refers to the order of the channels to which the alert will be sent to each contact who has **NOT** indicated a preferred method of contact.



To determine the fallback sending order:

- Click and drag the four options (email, SMS, voice, and fax) into the order you would like them to be used
- For example, if your fallback sending order is ranked email, SMS, voice, and fax, the system will look for an email address in the contact's Contact Manager profile first, and if it finds one, the alert will be sent to the contact only via that delivery method
- If the system does not see an email address, then it will look for a mobile phone number in the profile to which to send the alert via SMS
- The system will keep searching in the order of devices you select until it finds a delivery method that it can use to send the alert to the contact
- Click Next to complete the setup process and proceed to the main Alerts Dashboard

2 Send all Created Messages

Choosing to send your alert through the Send All Created Messages option means that you are able to manually choose which delivery methods you would like to use to send the alert to all of your chosen contacts.

To select the Send All Created Messages option:

- Click the radio button found next to the Send all Created Messages option, underneath the Select Sending Method header
- Depending on how many options you created in the previous step, each of your contacts will receive the alert through each of those methods, provided that contact information is available in their Contact Manager profile

[Note: For example, say you created an email and SMS for your alert. The alert will then be sent out via email and SMS to every one of your chosen contacts. This means that if a contact has provided an email address and a mobile phone number in their Contact Manager profile, they will then receive the same alert twice, once via email and again via SMS.]

- Click the Next button at the bottom right side of your screen to complete the setup process and proceed to the Scheduling page

If you have chosen to send your alert via the voice channel, you also have the option to prioritize which phone number the system will call to send the alert.

There are two options you can choose from:

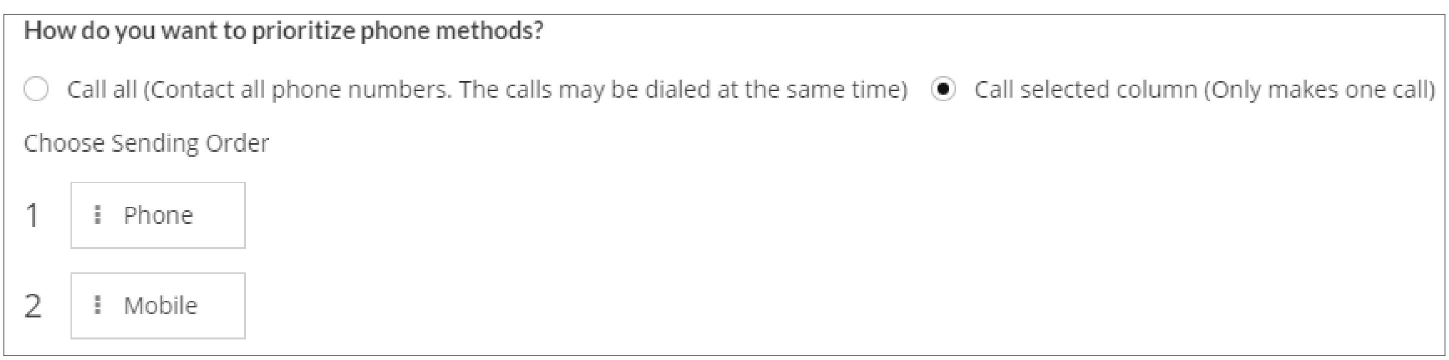
1 Call All

Selecting this option for your voice alert means that the system will send the alert to each of the phone numbers that the contact has registered in their Contact Manager profile. If the contact has both a phone number and a mobile number listed, they will receive calls to both of these numbers.

2 Call Selected Column

The Call Selected Column option allows you to choose and prioritize which Contact Manager phone number column the system will look at when sending the voice alert. Selecting this option will bring up a list of phone number columns you can prioritize the sending for.
The two default columns are the Phone and Mobile columns. However, you do have the option of adding additional phone number fields into your Contact Manager (such as a home/office/cottage number). For more information on how to do so, consult the Contact Manager User Guide.

Click and drag these options to determine the sending order of your voice alert. The system will call the numbers one at a time until the list is exhausted or the recipient picks up the phone.



Schedule Your Alert

Once you have added the contacts who will receive your alert, you will be directed to the Schedule Alert page of the setup process.

There are two ways you can choose to send your alert:

1 Send Now

To send the alert immediately once you have finished the setup process, simply check off the Send Now option that appears underneath the Schedule Alert header. If you have checked off this option, as soon as you click the Complete button at the bottom right-hand side of your screen the alert will be sent out.

2 Schedule for a Later Time

To postpone the sending of your alert to another date or time, select the Schedule option located beneath the Schedule Alert header. **Once you click this option:**

- You will see three fields pop up below the Send Now and Schedule options. The left-hand field is where you must determine the Start Date when you wish to send your alert. Clicking this field will bring up a dropdown calendar you can use to select your desired date
- Next, choose your Start Time from the dropdown menus in the middle field
- In the far right field, select the Time Zone you wish the system to operate in when sending your alert
- Click the Complete button at the bottom right of your screen to finish the alert setup process, or click the blue Save and Exit button located at the top right-hand corner of your screen to save your alert without scheduling it and return to the main Alerts Dashboard

Alert Reports

To view a report for any of your alerts, you must navigate to the EmergHub Reporting interface:

- Go to the main Alerts Dashboard
- Click the Reports option from the menu at the far left of your screen
- You will be directed to the Alerts Reporting page in the main Reporting interface

Once in the Alerts Reporting Dashboard, you are able to:

1 View the List of Reports

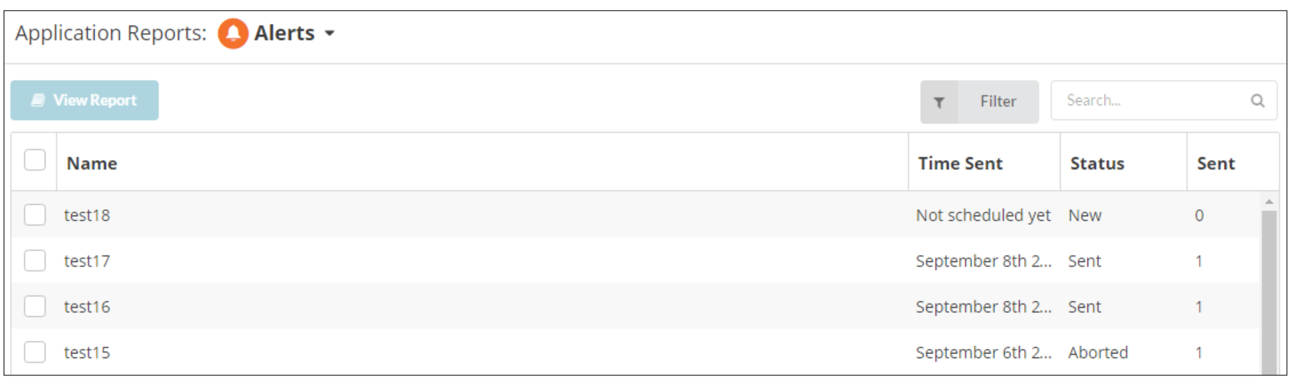
When you enter the Alerts Reports Dashboard, you should immediately see a list of all the alerts you have deployed with the most recent alert being at the top of the list. If there are no alerts in the list, you have not yet created any.

Each report in the list is broken down into four columns: Name, Time Sent, Status, and Sent.

- **Name:** This is the name you gave to the alert when you created it
- **Time Sent:** This is the date and time that the alert was deployed to your contacts
- **Status:** This displays whether the alert is new, scheduled, aborted, active, sent, or unknown
- **Sent:** This displays the total number of alerts that were sent out

2 Navigate Multiple Pages of Reports

If you have created enough alerts, they will be displayed on multiple pages in the Reports Dashboard. To view an alert that does not appear on the first page of the list, navigate down to the bottom of your screen where you will find the page numbers indicating the total number of alerts you have created. Proceed to another page of alerts by clicking either the page number you would like to visit, or the Next button which will take you to the next page of alerts. If you know the page number you would like to go to, enter the page number in the provided field and select Go. You can also choose how many alerts to display at a time by clicking on the "Showing..." link located to the right of the number of displayed alerts.



3 Search/Sort Reports

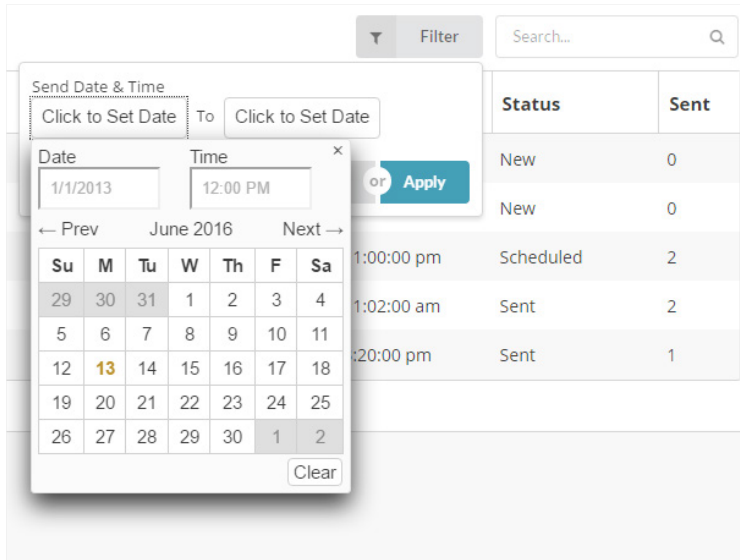
If you are trying to find a particular alert for which to view the report, you can simply use the search bar located at the top right of the screen above the list of all the reports in the main Alerts Reporting page. As you type in the name of the report you are searching for, the results will automatically be filtered to show the matches to the typed-in text.

You are also able to sort your alert reports alphabetically or reverse-alphabetically by name by clicking on the Name column in the Reports Dashboard. Once clicked, your list of reports will reorder automatically.

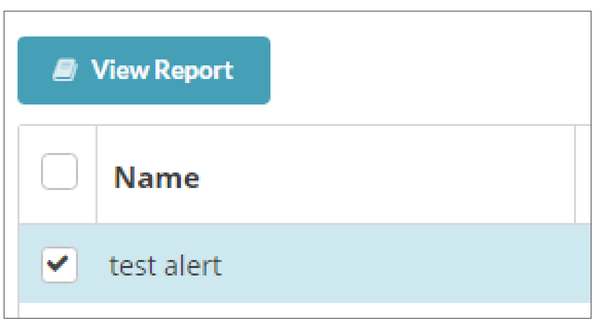
4 Filter Reports

You have the ability to filter your alert reports to show alerts from a particular date, at a particular time, or within a certain window of time. **To filter your alerts:**

- Find the gray Filter button that is located at the top right-hand side of your screen in the main Alerts Reporting page, directly above the list of alerts, beside the search bar
- Click the Filter button and a dropdown menu will appear in which you will see two boxes that say Click to Set Date
- Click either box and another dropdown menu will show up with two fields labeled Date and Time in which you can manually insert the date and time you would like to filter alert reports from
- Below these fields there is a calendar you can also use to choose the date that you would like to filter reports from
- Click Apply to implement the filter. Or, click Clear if you do not wish to filter your reports, which will close the dropdown menu



5 View Reports



To view the report of a particular alert:

- Select the alert that you would like to see the report for by checking off the box that appears to the left of the alert's title
- The blue View Report button on top of the alert list will become active and able to be clicked on once you have checked off an alert
- Click View Report and you will be directed to the report for that particular alert

Report Overview

The first section that you will see in the report of your particular alert is the Overview section.

This section will display separate boxes with the following information:

- **Queued:** This box contains the number of alerts that the system attempted to send via the different delivery methods

- **Contacted:** This box contains the total number of contacts your alert has reached up until this point
- **Not Contacted:** This box contains the total number of contacts your alert has not yet reached.
- **Status:** This box will indicate the alert's status (i.e. Sent, Scheduled, Aborted).
- **Emails:** This box will only appear if you have selected Email as a delivery method for your alert. The box will contain the number of total email alerts that were sent
- **SMS:** This box will only appear if you have selected SMS as a delivery method for your alert. This box will contain the total number of SMS messages that were sent

- **Voice:** This box will only appear if you have selected Voice as a delivery method for your alert. This box will contain the total number of voice alerts that were sent
- **Fax:** This box will only appear if you have selected Fax as a delivery method for your alert. This box will contain the total number of fax alerts that were sent

Click on any of these options to be directed to the report for that specific channel. To learn more about email, SMS, voice, and fax reports, refer to the Report section in the User Guides for these specific modules

Confirmed Receipt Report

The second section in the report is the Confirmed Receipt Report, where you can see which contacts have replied to your alert, confirming that they have received and read it. This section is only relevant if you have enabled the Confirm Receipt of Alert section in the alert setup. Refer to pages 6, 7, 9, or 10 for more information.

At the top of the section you will see the total number of confirmed responses to your alert.

Below this, there are four columns of information:

- **Name:** This column refers to the name of the contact who confirmed the receipt of the alert
- **Response Method:** This column refers to the communication channel that the contact used to confirm their receipt of the alert (email, SMS, or voice)
- **Response Time:** This column refers to the date and time that the receipt confirmation was sent by the contact
- **Last Response:** This column refers to the last response that was provided by the contact

If you have obtained enough receipt confirmations, they will be displayed on multiple pages in the report. To view a confirmation that does not appear on the first page of the list, navigate down to the bottom of your screen where you will find the page numbers indicating the total number of confirmations you have received. Proceed to another page of confirmations by entering the page number you would like to visit in the provided field and selecting Go, or by clicking the Next button which will take you to the next page of confirmations. You can also choose how many confirmations to display at a time by clicking on the "Showing..." link located to the right of the number of displayed confirmations.

To search for a particular contact within this section:

- Locate the search bar that appears at the top of the lists of contacts in this section on the right side of your screen
- Type in the name of the contact in the search bar
- Results will begin to filter automatically to match the typed text

Not Confirmed Receipt Report

The third section in the report is the Not Confirmed Receipt Report, where you can see which contacts have not yet replied to your alert, confirming that they have received and read it. This section is only relevant if you have enabled the Confirm Receipt of Alert section in the alert setup. Refer to pages 6, 7, 9, or 10 for more information.

At the top of this section you will see the total number of not confirmed responses to your alert.

Below this, there are six columns of information:

- **Contact ID:** This column refers to the individual number given to the contact in the Contact Manager
- **Name:** This column refers to the name of the contact who has not confirmed the receipt of the alert
- **Email:** This column displays the contact's email address that the alert was sent to
- **Phone:** This column displays the contact's phone number that the alert was sent to
- **Mobile:** This column displays the contact's mobile number that the alert was sent to
- **Fax:** This column displays the contact's fax number that the alert was sent to

If enough alert recipients have not confirmed their receipt of your alert, they will be displayed on multiple pages in the report. To view a contact that does not appear on the first page of the list, navigate down to the bottom of your screen where you will find the page numbers indicating the total number of contacts who have not confirmed their alert.

Proceed to another page of contacts by entering the page number you would like to visit in the provided field and selecting Go, or by clicking the Next button which will take you to the next page of contacts. You can also choose how many contacts to display at a time by clicking on the "Showing..." link located to the right of the number of displayed contacts.

To search for a particular contact within this section:

- Locate the search bar that appears at the top of the lists of contacts in this section on the right side of your screen
- Type in the name of the contact in the search bar
- Results will begin to filter automatically to match the typed text

Send Report

The fourth section of the report is the Send Report section. This is where you can see the list of contacts that you have sent the alert to as well as the method that was used to send the alert. **This section is comprised of up to five columns:**

Name: This column refers to the name of the contact that was sent an alert

Preferred Method: This column refers to the contact's preferred method of communication, if indicated in their Contact Manager profile

Sent Email: This column refers to whether the contact was sent an email alert or not. This will only appear if the alert was set to send through email.

Sent SMS: This contact refers to whether the contact received an SMS alert or not This will only appear if the alert was set to send through SMS.

Sent Voice: This column refers to whether the contact received a voice alert or not. This will only appear if the alert was set to send through Voice.

Sent Fax: This column refers to whether the contact received a fax alert or not. This will only appear if the alert was set to send through Fax.

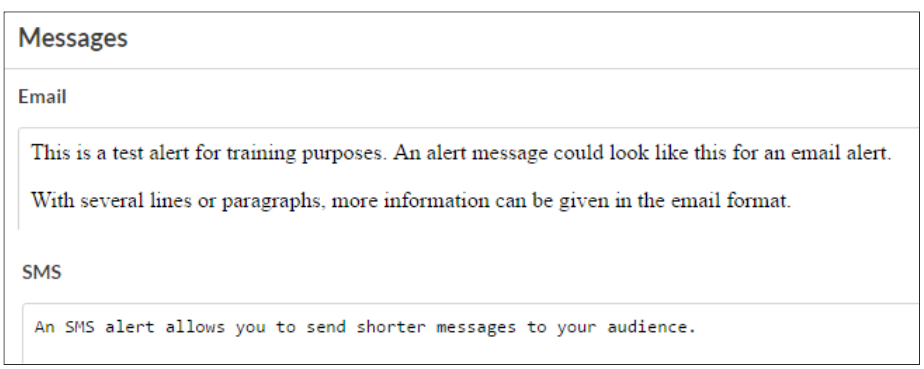
If you sent alerts to enough contacts, they will be displayed on multiple pages in the report. To view a contact that does not appear on the first page of the list, navigate down to the bottom of your screen where you will find the page numbers indicating the total number of contacts you have received.
Proceed to another page of contacts by clicking either the page number you would like to visit, or the Next button which will take you to the next page of contacts. If you know the page number you would like to go to, enter the page number in the provided field and select Go. You can also choose how many contacts to display at a time by clicking on the *"Showing..."* link located to the right of the number of displayed contacts.

To search for a particular contact within the report:

- Locate the search bar that appears at the top of the lists of contacts in this section on the right side of your screen
- Type in the name of the contact in the search bar
- Results will begin to filter automatically to match the typed text

Messages

The fifth section of your alert's report is the Messages section. In this section, you are able to view the text of each of the messages you have created per sending method. You will only see text boxes for delivery methods you have created an alert message for.



Download Report

To download the entire alert report to your device, there is a blue download button that is located at the top right of the report. **When you click the download button:**

- A dropdown menu will appear with two file formats to choose from
- Choose to download the report in either CSV or XLSX format by clicking the appropriate option in the dropdown menu

- You will be directed to a page with all of your requested downloads that will show the name of the report, the status, the file type, and the date it was created.
- The page will continue to refresh until the requested download is approved

Alerts IVR

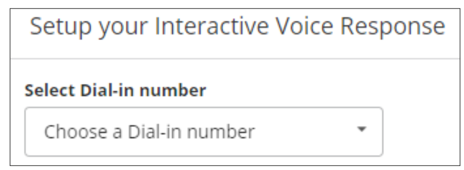
The Alerts IVR allows EmergHub users with the appropriate permissions to create a call tree system that they or other users can use for a variety of purposes, such as deploying an alert or connecting to an appropriate department official.

In order to begin creating your IVR, you must navigate to the IVR Builder Dashboard by selecting the IVR option from the menu on the left side of your screen on the Alerts Dashboard.

From the IVR page you can:

1 Select a Dial-in Number

If you wish to create a new IVR, you must first select a dial-in number to use from the dropdown that appears on the first page of the Alerts IVR setup. This phone number is the number that the users who are authorized to use this IVR will dial to gain access to the options that were set up.



2 Disable a Dial-in Number

Once you have chosen a dial-in number, additional fields will appear below the dropdown menu, as well as a red Disable dial-in Number button that will appear to the right of the dial-in number dropdown. Click this button if you would like to disassociate this phone number from your IVR and re-add it to the pool of available dial-in numbers. This means that the current IVR will become inactive until a new dial-in number is chosen.

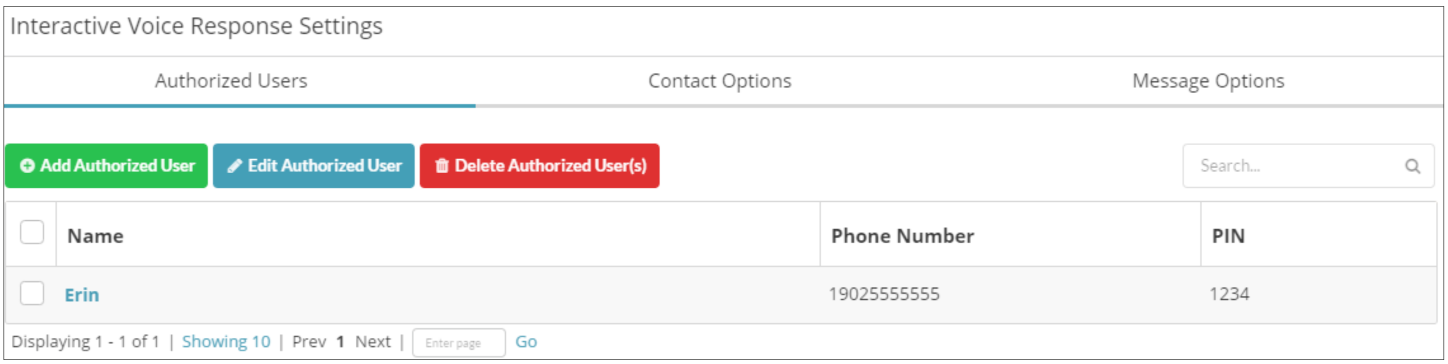
3 Determine the List of Authorized Users

In the Interactive Voice Response Settings section in the Alerts IVR setup, there are three tabs. The first of these tabs is where you must set up your list of authorized users who will be allowed to access and utilize this IVR. **To do this:**

- Click the green Add Authorized User button that appears on top of the table of authorized users (if there are already users added) and a sidebar window will appear from the right side of your screen
- Fill out the Name and Phone Number fields for the new authorized users and then provide them with a unique four to six digit PIN which they will be required to use in order to access the IVR
- Click the green Create button at the bottom of the sidebar to save the new authorized user, or click cancel to close the sidebar without creating the new user
- The information for the new authorized user will appear in the table containing the list of all authorized users appearing in this tab. You can see the name, phone number, and the PIN for each user
- Edit the information for an authorized user by clicking the checkbox to the left of the name of the user you wish to edit and in doing so, a blue Edit Authorized User button will appear to the right of the green Add Authorized User button. Click this button to bring open the sidebar where you can edit the name, phone number, and/or PIN for that user

- Delete an authorized user by clicking the checkbox to the left of the user's name in the list of authorized users. A red Delete Authorized User(s) button will appear next to the blue Edit Authorized User button at the top of the list. Click this button to delete the chosen user. Delete multiple users by checking off the boxes next to all the users' names you wish to delete and clicking the Delete button
- View multiple pages of authorized users by navigating down to the bottom of your screen where you will find the page numbers indicating the total number of users you have created. Proceed to another page of users by clicking either the page number you would like to visit, or the Next button which will take you to the next page of users. If you know the page number you would like to go to, enter the page number in the provided field and select Go. You can also choose how many authorized users to display at a time by clicking on the "Showing..." link located to the right of the number of displayed users

  Search for a particular authorized user by using the search bar located at the top right of the list of users. Results will filter to match the typed-in text

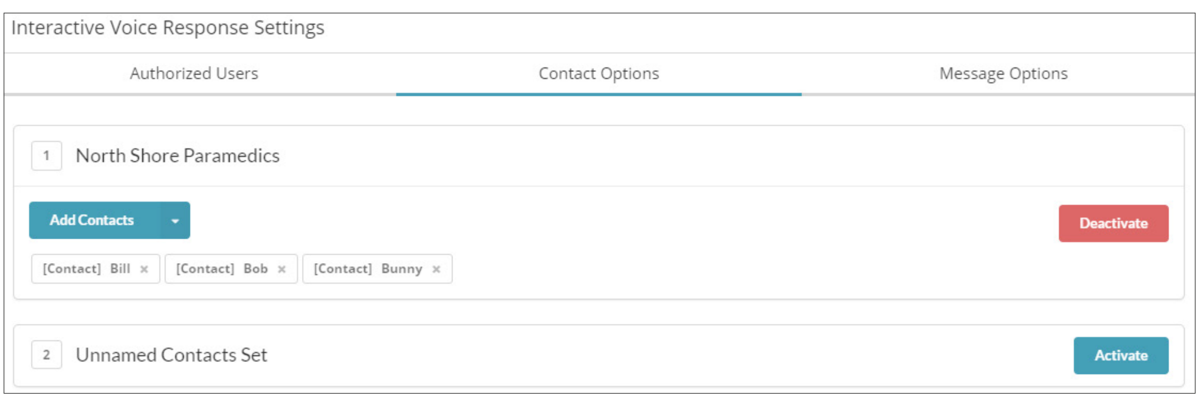


4 Set up IVR Contact Options

The second tab in the Interactive Voice Response Settings section is the Contact Options tab, where you are able to determine which contacts authorized users can send an alert to using this IVR. Each number on your dialpad can be set to send an alert to a pre-determined contacts set.

To set up these contact options:

- In the Contact Options tab in this section of the IVR setup, you will see a list of nine Unnamed Contacts Set fields (one for each number on your dialpad). Click on the title text to edit the name of the contact option
- Next, activate the contact option by clicking the blue Activate button to the far right of the field. Activating a field will allow it to become usable for deploying alerts to the chosen contacts



- Once you activate a contact option, a blue Add Contacts button will appear below the option's name. Clicking this option will allow you to determine the contacts that will be sent the alert when this particular dialpad number is pressed. Refer to page 11 to learn how you can add contacts using each of the available options in the Add Contacts dropdown
- You are able to view all your added contacts for that particular dialpad option in the space below the blue Add Contacts button. Delete any of these contacts by clicking the "X" button to the right of the contacts set name
- Deactivate a contact option by clicking the red Deactivate button that appears to the right of an active dialpad field. Deactivating an option means that this dialpad number will not be able to be chosen when trying to send an alert via IVR

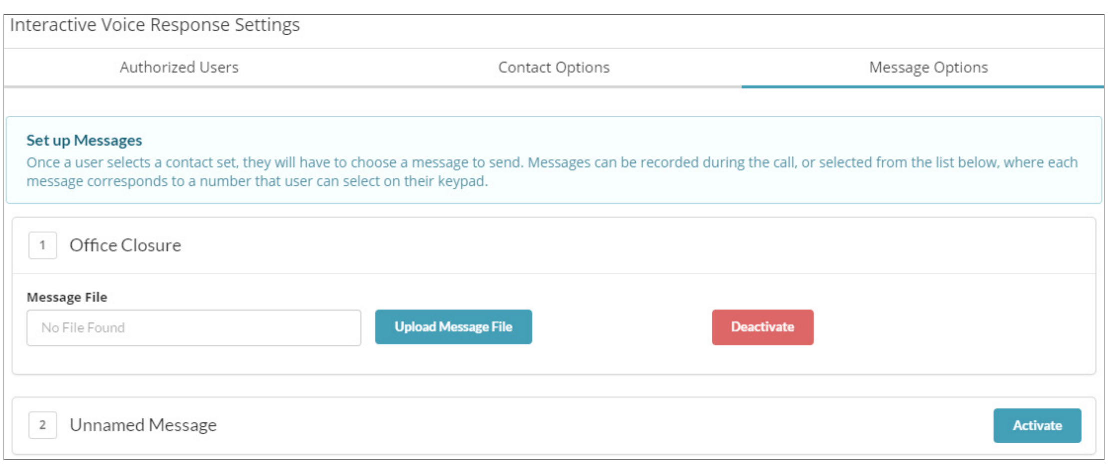
5 Configure IVR Message Options

Once you have added contacts to each of the contact options you wish to use for this Alerts IVR, you must now create the alert messages that will be able to be deployed to them once an authorized user uses the IVR and presses the appropriate dialpad number to trigger an alert to that contact set. You can set up these alerts in the Message Options tab in the Interactive Voice Response Settings section of the Alerts IVR setup.

To set up the alert message options:

- In the Message Options tab in this section of the IVR setup, you will see a list of nine Unnamed Message fields (one for each number on your dialpad). Click on the title text to edit the name of the message option
- Then you must activate the dialpad option by clicking the blue Activate button located to the right of the message name. Activating a field will allow it to become usable for deploying alerts to the chosen contacts
- Once you activate a message option, a blue Upload Message File button will appear below the option's name. Clicking this button will open a pop-up window where you can choose an audio file from your device that you would like to use as the alert for this dialpad option
- Deactivate a message option by clicking the red Deactivate button that appears to the right of an active dialpad field. Deactivating an option means that this dialpad number will not be able to be chosen when trying to send an alert via IVR to these particular contacts

[**Note:** Authorized users are also able to record a message on the fly during the call to the Alerts IVR. To do this, dial the dial in number and select your contacts set. Once chosen you will be asked to press 1 to record a new message, or press 2 to select from your pre-configured alert messages.]



Assignments

1. Your company has experienced an unexpected power outage which leaves your employees unable to perform their jobs. Your clients who reside outside the city are becoming frustrated with the lack of service they are receiving.
   a) Create and schedule an alert to be sent via SMS and voice to demonstrate this scenario.
   b) Filter your contacts to include only those who reside outside of the city and would be unaware of a power outage.

2. A gas leak has started in your company's office and you need to make sure everyone knows to evacuate the building as soon as possible.
   a) Create an immediate alert to be sent via email, SMS, and voice to demonstrate this scenario.
   b) Which sending method (Use Preferred Method or Send All Configured Messages) would be the most efficient way to alert your contacts? Explain.

3. a) What is the function of the Confirm Receipt of Alert feature?
   b) Provide a brief example of a scenario where it would be useful to have alert recipients confirm the receipt of the alert.
   c) What benefits can the system manager receive from knowing that their contacts have received their alert?

4. Which of these is not an option when enabling the Answering Machine Detection settings for a voice alert?
   a) Hang up
   b) Hold
   c) Continue

5. True or False? In creating an SMS alert, the alert message must contain 140 characters or fewer for it to send. If the message contains more than 140 characters, it will not be able to be sent.

Frequently Asked Questions (FAQs)

Can I change the default sender address for an email alert?

Yes. You may choose any email address that you have access to in the system. To add a new sender address, navigate to your account number in the top right corner of your screen and choose the My Profile option from the dropdown menu. From here choose the Sender Addresses tab located four down from the top of the side-bar on the left side of the screen, which will lead you to the page where you can ad a new sender address.

What is the maximum file size for an email attachment?

The maximum file attachment size is 5MB.

What is the difference between CSV and XLSX formats?

CSV (Comma Separated Values) and XLSX (Excel Spreadsheet) are both spreadsheet documents, however CSV is only able to contain values for each cell and can't contain formatting (like bolding or coloring) or formulas like XLSX can. CSV is a more basic version of an XLSX and because of this we suggest it when uploading a contact list as additional formatting can sometimes lead to problems.

What file formats can I use to upload a message for a voice alert?

The software is currently able to support WAV, MP3, and M4A files.

Is there a geo-fencing capability for Alerts?

Not at this time, but it is included in the project plan.

How do you cancel an outgoing alert?

Essentially you can't delete an alert if it has already been deployed, although you can abort the alert. However, the alert will likely still be sent to multiple contacts before the abortion is complete.

Can we merge alert reports (i.e. an email/SMS/voice alert for the same event merged into one large report)?

Not at this time.

Can you send an alert on behalf of someone else?

Yes, if you add multiple sender addresses.

When you press 1 to confirm receipt of an alert left on a voice-mail, will it work?

No, only alerts received at the time they come in can be confirmed.