



# **BlackBerry AtHoc**

## **Manage Alert Templates User Guide**

7.7



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# Manage alert templates

Alert templates define the types of alerts that can occur within an alert folder, enabling operators to quickly publish the appropriate alert during an emergency.

When initially setting up the BlackBerry AtHoc system, the Administrator defines the alert folders (categories of alerts) and appropriate alert templates for each folder. Later, the Administrator or Advanced Alert Managers can add new alert templates or modify existing ones.

**Note:** When operators access the Alert Templates screen, they can see only alert templates associated with folders to which they have access.

# Access the Alert Templates screen

**Note:** Only Advanced Alert Managers and Administrators can access the Alert Templates screen.

1. In the navigation bar, click **Alerts**.
2. Click **Alert Templates**. The Alert Templates screen opens.

You can click **New** on the **Alert Templates** screen to create new templates. In addition, if a template has a check box beside its name, you can select it and either duplicate or delete it as necessary.

The following columns are displayed in the list:

- **Checkbox**—Displays a check box beside the alert templates that can be duplicated or deleted. System templates, such as the [New Alert Template] and the Incoming Connect Alert, cannot be duplicated or deleted, so no check boxes appear beside their names.
- **Alert Template Name**—Displays the alert template names, sorted alphabetically. Click the Name header to sort in alphabetical order and click the same again to sort the names in reverse alphabetical order.
- **Folder**—Displays the name of the alert folder that contains the alert template. Click the Folder header to sort in alphabetical order and click the same again to sort folders in reverse alphabetical order.
- **Next Occurrence**—Displays the next scheduled date/time for an alert related to a recurring alert template. Click the Next Occurrence header to sort chronologically by next scheduled occurrence and click the same again to sort in reverse chronological order.

# Create an alert template

**Note:** Advanced Alert Managers and Administrators can create new alert templates.

1. In the navigation bar, click **Alerts**.
2. Click **Alert Templates**.
3. Click **New** on the **Alert Templates** screen.
4. On the screen that appears, select or enter values in each of the following sections, details of which can be found in the following sections of the *Create and Publish Alerts* guide:
  - Define alert template details
  - Define content for an alert or alert template
  - Target users
  - Target AtHoc Connect organizations (If this has been enabled for your organization)
  - Select and configure mass devices for an alert or alert template (Only available in English-language alert templates)
5. Configure the schedule for the alert template. See [Configure the schedule for an alert or alert template](#).
6. After you have reviewed the template content, click **Save**.

# Manage visibility settings for alert template fields

**Note:** Only Advanced Alert Managers, Alert Publishers, and Administrators can manage alert template settings.

Within BlackBerry AtHoc, alert templates typically consist of alert content, response options, a list of targeted recipients, and a list of delivery devices for a specific situation.

The contents and behavior of the different sections of the alert template creation and alert template editing screens are controlled from a central Alert Template Settings screen. The visibility settings you select affect all alerts that are published from the template.

For example, if you choose to hide the Mass Devices section from an alert template called "Alert Mobile Users," that section will be hidden for all alerts that are published from the alert template.

You can customize the visibility settings for the fields in each of the following alert template sections:

- Content
- Target Users
- Target Organizations
- Mass Devices
- Schedule

## Manage visibility options for Content fields in an alert template

1. In the navigation bar, click **Alerts**.
2. Click **Alert Templates**.
3. Click **New**.
4. Click **Settings** on the **details** screen for the alert template. The Alert Template Settings screen appears with the Content tab open by default.
5. In the **Enable** section, select the check boxes beside each of the content options you want to make visible to users who are creating alerts based on this alert template. You can show or hide any of the following options for content:
  - **Response Options**—Select this check box if you want users creating alerts from this alert template to be able to include response options in the alert.
  - **Location**—Select this check box if you want users creating alerts from this alert template to be able to designate on a map a specific location for the alert.
  - **Is Location Mandatory**—Select this check box if you want to make it mandatory for users creating alerts from this template to select a location for the alert.
  - **Dropbox**—Select this check box if you want users to be able to add attachments to their alerts. These attachments would be available to alert recipients through a link in the alert that opens a file stored in Dropbox.
6. In the **Visibility in Alert** section, do one of the following:
  - Select **Show Content Section**, then select the check boxes beside each option you want to make available to users who are creating alerts from the alert template.
    - Select **Show as initially collapsed** if you want the Content section to display in its collapsed state when the alert template is first opened by the alert creator.
    - Select the **Show as read-only and prevent publisher from editing** check box if you the alert creator to be able to see the Content section without being able to edit it.

- Select **Hide Content Section** if you do not want users who are creating alerts from the alert template to be able to see the Content section.

**Note:** If a section is not ready, you cannot make that section "read only" or hide it.

7. Click **Apply**.

## Manage visibility options for Target Users fields in an alert template

To manage the visibility settings for the alert template Target Users fields, complete the following steps:

1. In the navigation bar, click **Alerts**.
2. Click **Alert Templates**. The Alert Templates window opens.
3. Click **New**. The New Template window opens.
4. Click **Settings**. The Alert Template Settings window opens.
5. Click **Target Users**.
6. Optionally, in the **Enable** section, select the **Fill Count** option to enable specifying a certain number of responses before ending an alert. For more information, see "Define fill counts and escalation" in the *BlackBerry AtHoc Create and Publish Alerts Guide*.
7. Optionally, in the **Enable** section, select the **Dependents** option to enable inclusion of dependents in alerts. For more information, see "Create dependents for a user" in the *BlackBerry AtHoc Manage Users Guide*.

**Note:** You cannot enable Fill Count and Dependents at the same time.

8. In the **Enable Targeting** section, select the check boxes beside each of the user targeting options you want to make visible to users who are creating alerts based on this alert template.

**Note:** You must select at least one targeting method.

You can show or hide any of the following options for targeting users:

- By groups
- By name
- By advanced query
- By location
- By personal devices. For this option, there is a list of all personal devices you can make visible or hide from users who are creating alerts based on the alert template.

9. In the **Visibility in Alert** section, do one of the following:
  - Select **Show Target Users Section**, then select the check boxes beside each option you want to make available to users who are creating alerts from the alert template.
    - Select **Show as initially collapsed** if you want the Targeted Users section to display in its collapsed state when the alert template is first opened by the alert creator.
    - Select **Show as read-only and prevent publisher from editing** if you want the alert creator to be able to see the Targeted Users section without being able to edit it.
  - Select **Hide Target Users Section** if you do not want users who are creating alerts from the alert template to be able to see the Target Users section.

**Note:** If a section is not ready, you cannot make that section "read only" or hide it.

10. Click **Apply**.

## Manage visibility options for Target Organizations fields in an alert template

1. In the navigation bar, click **Alerts**.
  2. Click **Alert Templates**.
  3. Click **New**.
  4. Click **Settings** on the **details screen** for the alert template.
  5. On the **Alert Template Settings** screen, click **Target Organizations**.
  6. In the **Enable** section, select the check boxes beside each of the organization targeting options you want to make visible to users who are creating alerts based on this alert template. You can show or hide any of the following options for targeting organizations:
    - By name
    - By location
  7. In the **Visibility in Alert** section, do one of the following:
    - Select **Show Target Organizations Section**, then select the check boxes beside each option you want to make available to users who are creating alerts from the alert template.
      - Select **Show as initially collapsed** if you want the Targeted Organizations section to display in its collapsed state when the alert template is first opened by the alert creator.
      - Select **Show as read-only and prevent publisher from editing** if you want the alert creator to be able to see the Targeted Organizations section without being able to edit it.
    - Select **Hide Target Organizations Section** if you do not want users who are creating alerts from the alert template to be able to see the Target Users section.
- Note:** If a section is not ready, you cannot make that section "read only" or hide it.
8. Click **Apply**.

## Manage visibility options for Mass Devices fields in an alert template

**Note:** This feature is not available for non-English alert templates.

1. In the navigation bar, click **Alerts**.
2. Click **Alert Templates**.
3. Click **New**.
4. Click **Settings** on the **details screen** for the alert template.
5. On the **Alert Template Settings** screen, click **Mass Devices**.
6. In the **Enable** section, select the check boxes beside each of the mass devices you want to make visible to users who are creating alerts based on this alert template. If you do not want a currently selected mass device to be available to alert creators using this alert template, deselect the device's check box.
7. In the **Visibility in Alert** section, do one of the following:
  - Select **Show Mass Devices Section**, then select the check boxes beside each option you want to make available to users who are creating alerts from the alert template.
    - Select **Show as initially collapsed** if you want the Mass Devices section to display in its collapsed state when the alert template is first opened by the alert creator.
    - Select **Show as read-only and prevent publisher from editing** if you want the alert creator to be able to see the Mass Devices section without being able to edit it.

- Select **Hide Mass Devices Section** if you do not want users who are creating alerts from the alert template to be able to see the Mass Devices section.

**Note:** If a section is not ready, you cannot make that section "read only" or hide it.

8. Click **Apply**.


## Manage visibility options for Schedule Fields in an alert template

1. In the navigation bar, click **Alerts**.
  2. Click **Alert Templates**.
  3. Click **New**.
  4. Click **Settings** on the details screen for the alert template.
  5. On the **Alert Template Settings** screen, click **Schedule**.
  6. In the **Visibility in Alert** section, do one of the following:
    - Select **Show Schedule Section**, then select the check boxes beside each option you want to make available to users who are creating alerts from the alert template.
      - Select **Show as initially collapsed** if you want the Schedule section to display in its collapsed state when the alert template is first opened by the alert creator.
      - Select **Show as read-only and prevent publisher from editing** if you want the alert creator to be able to see the Schedule section without being able to edit it.
    - Select **Hide Schedule Section** if you do not want users who are creating alerts from the alert template to be able to see the Schedule section.
- Note:** If a section is not ready, you cannot make that section "read only" or hide it.
7. Click **Apply**.

# Configure the schedule for an alert or alert template

The Schedule settings specify how long alerts will remain active.

1. Scroll down to the **Schedule** section in the alert or alert template.
2. In the **Schedule** field, select **Activate Recurrence** if you want to create an alert that will be used more than once. If you select this option, additional fields appear at the bottom of the screen. You will configure them in steps 5 through 7 below.
3. In the **Alert Timings** section, specify the following values:
  - **Start Time**—By default, this field cannot be edited and displays the text, "Set during alert publishing." However, if the Activate Recurrence check box was selected in Step 2, the field displays hour, minute, and AM/PM fields that you can use to set the start time for the alert template.
  - **Alert Duration**—The amount of time the alert should be active. Use the drop-down list to specify whether the time is in minutes, hours, or days.
4. If you *did not* select the Activate Recurrence check box in Step 1, click **Save** to finish creating the alert or alert template.

If you *did* select the check box, complete the following additional steps using the Recurrence-related fields on the screen.
5. In the **Recurrence Pattern** section, use the drop-down list to determine how often you want the alert to recur: daily, weekly, monthly, or yearly.
6. In the **Start Date** field of the **Recurrence Period** section, do one of the following:
  - Manually enter the day, month, and year that you want the alert to begin, writing the date in **MM/DD/YYYY** format (for example, January 25, 2015 would be written as 01/25/2015)
  - OR
  - Click  and navigate to and then click the day, month, and year that you want to use.
7. In the **End Date** field, select one of the three options:
  - **No end date**—The alert will continue to recur until you or someone else manually deletes it, adds an end date to it, or limits the number of occurrences.
  - **End after <X> occurrences**—The alert will continue to be sent out at the time interval you specified in Step 5 until it has been sent out the number of times you specify in this field.
  - **End by <date>**—The alert will continue to be sent out until the date you select in this field.
8. Click **Save**.

# View alert template details

View the details of an alert template to determine the name and description of the template.

1. In the navigation bar, click **Alerts**.
2. Click **Alert Templates**.
3. Hover your cursor over the name of an alert template. A pop-up window appears, displaying the following template details: Name, Description, Alert Title, Alert Body, and Last Published date.
4. To open the details page, click the name of the alert template.

A template details screen appears, displaying information about the template grouped into the following sections:

- **Alert Template**—Displays the name of the alert template along with a description of it.
- **Content**—Displays the title, body, and type for any alert that will be created from the template. Optionally can contain links to additional information or attachments related to the template, a geographic location for the template, and response options for any alert generated from the template.
- **Target Users**—Displays a summary of the users who will be targeted by any alert created from the template. If dependents are enabled for your organization and in the alert template, the Target Users section displays separate tabs for Sponsors and Dependents.
- **Target Organizations** (If this has been enabled for your organization)—Displays each of the organizations who will be targeted by any alert created from the template.
- **Mass Devices**—(Only available in English-language alert templates) Displays each of the mass devices that will be used to broadcast any alert created from the template.
- **Schedule**—Displays the start and end dates and duration for any alert created from the template. If relevant, also displays the recurrence settings for the template.
- **Info**—Displays the name of the person who created the template, the name of the last person to update the template, and the dates the template was created and updated. Depending on your system configuration, it might also contain a template ID number.

## Search for an alert template

The Alert Templates search engine matches any set of letters or numbers anywhere in a template name and is not case-sensitive.

**Note:** Wildcards are not supported in searches.

1. In the navigation bar, click **Alerts**.
2. Click **Alert Templates**.
3. In the **search** field, type or paste all or part of a template name.
4. Click **Search**.

## Filter the alert template list

The alert template list can be filtered by any of the following:

- Folder name
- Quick publish status (whether or not quick publishing has been enabled for an alert template)
- Recurring alert template status (whether or not recurrence has been activated for an alert template)

1. In the navigation bar, click **Alerts**.

2. Click **Alert Templates**. The Alert Templates screen opens with the search and filter options displayed at the top.
3. Optionally, in the **Folder** drop-down list, select the name of a folder to limit the search to only templates within that folder.
4. Optionally, select **Recurring Only** to limit the search to only alert templates that have been configured to occur repeatedly.
5. Click **Search**. The alert templates list then refreshes to display all templates that match the filter criteria.

#### Remove filters from the alert templates list

After you have filtered the templates list, you can remove any or all of the filters by doing the following:

- To remove all filters and return to the default alert templates list, click **Clear All** under the **Search** button.
- To remove a **Folder** filter, click the **Folder** drop-down list and then select **All** at the top.
- To remove a **Recurring Only** filter, deselect the corresponding check box.

## Sort the alert templates list

1. In the navigation bar, click **Alerts**.
2. Click **Alert Templates**.
3. Click the column heading by which you want to sort. The alert templates display in descending order of the values in the selected column.
4. Optionally, click the same column header again to sort in the opposite direction.

## View all details about an alert template

1. In the navigation bar, click **Alerts**.
2. Click **Alert Templates**.
3. Optionally, if the template list is long, use the search field and filters at the top of the screen to narrow it down.
4. Click the name of the alert template whose complete details you want to see.

A template details screen appears, displaying information about the template grouped into the following sections:

- **Alert Template**—Displays the name of the alert template along with a description of it.
- **Content**—Displays the title, body, and type for any alert that will be created from the template. Optionally can contain links to additional information or attachments related to the template, a geographic location for the template, and response options for any alert generated from the template.
- **Target Users**—Displays a summary of the users who will be targeted by any alert created from the template. If dependents are enabled for your organization and in the alert template, the Target Users section contains separate tabs for Sponsors Dependents.
- **Target Organizations** (If this has been enabled for your organization)—Displays each of the organizations who will be targeted by any alert created from the template.
- **Mass Devices**—(Only available in English-language alert templates) Displays each of the mass devices that will be used to broadcast any alert created from the template.
- **Schedule**—Displays the start and end dates and duration for any alert created from the template. If relevant, also displays the recurrence settings for the template.
- **Info**—Displays the name of the person who created the template, the name of the last person to update the template, and the dates the template was created and updated. Depending on your system configuration, it might also contain a template ID number.

## Change the number of templates listed on the alert templates screen

1. In the navigation bar, click **Alerts**.
2. Click **Alert Templates**.
3. Scroll to the bottom of the templates list.
4. Click the drop-down list that appears beside the phrase **items per page**.
5. Select the number of templates you want to display per page.

The screen refreshes and displays the total number of results you specified.

# Add custom placeholders for alert template content

**Note:** This topic explains how to insert alert placeholders, not how to create or import them. For details on those processes, refer to the [Create custom placeholders for alert templates](#) and [Import alert placeholder values](#) sections of this guide.

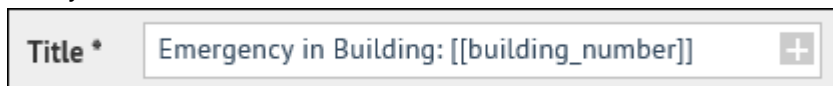
You can add alert placeholders to the following sections of an alert template:

- Alert Title field
- Alert Body field
- Response Options text field
- Custom text within Targeted Devices (Available only to Enterprise Administrator and Organization Administrator users) Can be specified for an enabled device that has a Custom Text option.

To add placeholders to an alert template, complete the following steps:

1. In the navigation bar, click **Alerts**.
2. Click **Alert Templates**.
3. Click an existing alert template to open an editable details screen or **New** to create a new template.
4. In the **Content** section, click **+** in the **Title**, **Body**, and **Response Options: Response Text** fields.
5. Select the appropriate alert placeholder option for the alert template.

Double brackets `[[ ]]` around the alert placeholder name in the selected field indicate that you have added the alert placeholder correctly.

A screenshot of a web form for editing an alert template. It shows a label 'Title \*' followed by a text input field. The input field contains the text 'Emergency in Building: [[building\_number]]'. To the right of the input field is a small square button with a plus sign inside.

6. Click **Save**.

An operator must then select the correct alert placeholder values when preparing to publish the alert. If a default placeholder value was selected, it will appear in the alert template. If no default value was selected, the operator must select a value before they can publish the alert.

# Edit an alert template

Within BlackBerry AtHoc, alert templates typically consist of alert content, response options, a list of targeted recipients, and a list of delivery devices for a specific situation.

You can edit an existing alert template to change features such as the default header, body text, and target audience.

1. In the navigation bar, click **Alerts**.
2. Click **Alert Templates**.
3. Use the search field or scroll down in the alert template list to locate the alert template you want to edit.
4. Click the name of the alert template.
5. Edit values in any of the following sections:
  - Alert Template
  - Content
  - Target Users
  - Target Organizations (if your system is set up for them)
  - Mass Devices (Only available in English-language alert templates)
  - Schedule
6. Click **Save**.

# Duplicate an alert template

Duplicating an alert template creates an exact copy of it in the system and can be used to speed up the creation of similar templates. You can duplicate any alert template that contains a check box beside its name.

1. In the navigation bar, click **Alerts**.
2. Click **Alert Templates**.
3. Use the search field or scroll down in the alert template list to locate the alert template you want to duplicate.
4. Select the check box beside the alert template name.

**Note:** If the template does not have a check box beside its name, it cannot be duplicated.

5. Click **Duplicate** at the top of the screen.

A New Alert Template screen appears, displaying all of the values that were part of the original alert template.

6. Make whatever changes you want to the alert template details.

**Note:** At a minimum, you should change the name of the alert template so that you can distinguish it from the original.

7. Click **Save**.

The screen refreshes and the new alert template appears in the list on the Alert Templates screen.

# Delete an alert template

Within BlackBerry AtHoc, alert templates typically consist of alert content, response options, a list of targeted recipients, and a list of delivery devices for a specific situation.

You can delete alert templates individually or in groups from the Alert Templates screen.

1. In the navigation bar, click **Alerts**.
2. Click **Alert Templates**.
3. Use the search field or scroll down in the alert template list to locate each of the alert templates you want to delete.
4. Select the check box beside each alert template that you want to delete.
5. Click **Delete** at the top of the screen. A confirmation popup screen opens, listing each of the alert templates you are about to delete.
6. Click **Delete**. The Alert Templates screen refreshes to show the alert template list without the alert template or alert templates you deleted.


# Alert template settings

The following topics provide information about managing alert template settings, including placeholders, folders, delivery templates, audio files, and map settings.

## Placeholders for alert templates

Placeholders provide a way to customize text such as date or time, a building number, or group name in an alert template. When the operator publishes the alert template, the placeholder value is inserted automatically. There are two types of placeholders in alert templates: System and Alert.

### View the list of placeholders for your organization

1. In the navigation bar, click  icon.
2. In the **Basic** section, click **Alert Placeholders**.

The Alert Placeholders screen appears, displaying a list of all of the alert placeholders you have access to in the system.

### Use system placeholders for alert template content

The alert template can contain predefined system placeholders in the title or body of the alert. The placeholders are replaced automatically with the appropriate values when the alert is published.

**Note:** System placeholders can also be added during alert publishing. Alert placeholders can only be added to alert templates.


The following Content fields support placeholders:

- Alert title
- Alert body
- Response options
- Custom text within Targeted Devices

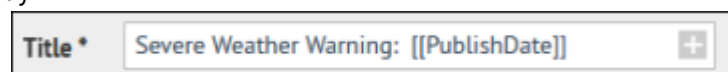
The following list describes the system placeholders:

- System-related: `[[SystemName]]`, `[[VirtualSystemName]]`, `[[VirtualSystemId]]`,
- Date or Time-related: `[[Timezone]]`
- Publisher-related: `[[OperatorFullName]]`, `[[PublishDate]]`, `[[PublishTime]]`

To add placeholders to an alert template, complete the following steps:

1. In the navigation bar, click **Alerts**.
2. Click **Alert Templates**.
3. Click an existing alert template to open an editable details screen or **New** to create a new alert template.
4. In the **Content** section, click  in the **Title**, **Body**, or **Response Options: Enter Response Text** fields.
5. Select the appropriate alert placeholder option for the alert template.

Double brackets `[[ ]]` around the alert placeholder name in the selected field indicate that you have added the alert placeholder correctly.



The screenshot shows a form field for the 'Title' of an alert template. The field is labeled 'Title \*' and contains the text 'Severe Weather Warning: [[PublishDate]]'. To the right of the text is a small square button with a plus sign inside.

6. Click **Save**.

An operator can then select the correct alert placeholder values when preparing to publish the alert.

## Create custom placeholders for alert templates

**Note:** Alert placeholders can be created at the Enterprise or organization level. Inheritance rules can have an impact on who can use them, so verify that you are creating them at the correct organization level. For more information, see “Manage Common Content with Inheritance” in the Enterprise Planning Guide.

You can create alert placeholders for alert templates so that operators can customize the content during publishing. For example, if your organization needs to create alert templates that reference building numbers, you can create an alert placeholder called `building_number`. When operators publish the alert template, they can select the correct building number for that instance of the alert template.

1. In the navigation bar, click **Alerts**.
2. Click **Alert Placeholders**. Alternately, you can access alert placeholders from the **Settings** screen. The Alert Placeholders screen opens.
3. Click **New**.
4. In the drop-down list, select one of the following alert placeholder types:
  - **Multi-select Picklist**—Alert creators can select one or more of the values in the list and have them appear in the alert when it is published.
  - **Single-select Picklist**—Alert creators can select one of the values in the list and have it appear in the alert when it is published.
  - **Text**—Alert Publishers are prompted to enter text that conforms to a minimum and maximum length. You can designate how many lines of text to display in the text box as well as set default text.
  - **Date**—Alert creators can accept the pre-set date or manually enter a new date before the alert is published.
  - **Date Time**—Alert creators can accept the pre-set date and time or manually enter a new date and time before the alert is published.
  - **Time**—Alert creators can accept the pre-set time or manually enter a new time before the alert is published.

The Organization field on the screen that appears tells you at which level you are creating the placeholder: Enterprise or organization.

5. Enter a name for the alert placeholder. The name must be between 1 to 200 characters and must be unique in the system.
6. Specify values and defaults for the alert placeholder, depending on the type.
  - **Multi-select Picklist**
    - Enter at least two unique values that have between 1 and 50 characters. Angle brackets (<>) are not allowed.
    - You can import the values from an existing text or .csv file. For more information, see [Import alert placeholder values](#).
    - Click the check box of at least one value to set it as the default.
  - **Single-select Picklist**
    - Enter at least one unique value between 1 and 50 characters. Angle brackets are not allowed.
    - You can import one or more values from a text or .csv file. For more information, see [Import alert placeholder values](#).
    - The name is case insensitive.
    - Click the check box of at least one value to set it as the default.
  - **Text**—Enter numerical values for the minimum length, the maximum length, and the number of lines to show. Angle brackets are not allowed.
    - Set the Minimum length to a value between 1 and 400 characters.

- Set the Maximum length to a value between 1 and 400 characters.
- Set the value for Lines to show to a value between 1 and 5. This value controls the height of the text box on the alert publishing screen.
- Enter a text string for the Default value, with the number of characters between the Minimum length and the Maximum length.
- **Date**—Select the default date for the placeholder.
- **Date Time**—Select the default date and time for the placeholder.
- **Time**—Select the default time for the placeholder.


7. Click **Save**.

The alert placeholder is created and appears in the Placeholder list for all alert creators who have access to the Enterprise or organization in which the placeholder was created.

## Remove alert placeholders

**Important:** You cannot remove alert placeholders that are currently in use in an alert template. If you try to delete the alert placeholder, a popup screen appears, listing each of the alert templates in which the alert placeholder is used.

To remove alert placeholders from the Alert Placeholders screen, complete the following steps:

1. In the navigation bar, click  icon. The Alert Placeholders screen appears, displaying a list of all of the alert placeholders you have access to in the system.
2. Click the alert placeholder that you want to remove and when it opens, click **Delete** at the top of the screen.
3. If the placeholder is used in any alert templates, a list of dependencies will appear. In order to delete the placeholder, you must first remove the dependencies by completing the following steps:
  - a. Open each of the alert templates in which the alert placeholder is being used.
  - b. Manually remove the alert placeholder.
  - c. Save your changes.
  - d. Return to the placeholder details view and click **Delete**.
4. Click **Delete** to confirm that you want to delete the alert placeholder.

The alert placeholder is removed from the custom section of the list.

## Import alert placeholder values

You can import values for alert placeholders for single-select and multi-select picklists. Importing the values helps you avoid entering multiple values, especially if you are creating a long list.

Import the values from a .csv file that has one column or one value per line.

**Note:** Angle brackets (<>) cannot be used in alert placeholders: values containing these characters are rejected.

1. In the navigation bar, click **Alerts**.
2. Click **Alert Placeholders**.
3. On the **Alert Placeholders** screen, click **New**.
4. In the drop-down list that appears, select either the **Multi-select Picklist** or **Single-select Picklist** option.
5. On the **Alert Placeholders** screen, click **Import Values**.
6. On the **Import Values to New Placeholder** screen that pops up, click **Browse** and select a .csv file.

**Note:** The file must be closed before you try to upload it. If it is open, you will get an error message when you click Open in the next step.

7. Click **Open**.

8. Optionally, select **Replace all current values with the imported values** if you want the new values to overwrite the existing values. If you want to keep existing values and add the new values, leave this check box unselected.
9. Click **Import**.
10. Click **Save**.

## Activate an alert template when an alert is received

You can use alert placeholders in alert templates that are triggered by an incoming alert. When set up, the incoming alert type automatically publishes an alert to targets specified in the alert template, and at publishing time. Response options, locations, and attachments can be included in the triggered alert.


For example, you can set up an alert template that responds to a mobile user when the user sends an emergency alert. To set up the trigger, you need to create an alert template in which to put the alert placeholders. Or, if you receive an incoming alert from a Connect organization, you can forward it to other organizations to which you are connected. To learn how to create rules for handling incoming alerts, see "Manage alert rules" in the *BlackBerry AtHoc Manage Incoming Alerts from the Inbox* guide.

**Note:** If an incoming alert targets a map location, the location is automatically added to the triggered alert. The alert then targets organizations or users that have locations within the specified map area.

Use the following alert placeholders in an alert template:

- \$SenderName\$
- \$SenderContacts\$
- \$InboundEventTitle\$
- \$InboundEventBody\$

To add the alert placeholders, complete the following steps:

1. In the navigation bar, click .
2. In the **Basic** section, click **Alert Templates**.
3. Click **New** to create a new alert template that will respond to an incoming alert, such as "I have an emergency."
4. In the **Content** section, enter an alert title and the alert body that will be sent when the incoming alert is received.

For example

**Alert Title:**

Please help!

**Alert Body:**

```
$SenderName$ needs help and sends the following message:
  $InboundEventTitle$
  $InboundEventBody$
  $SenderName$'s info:
  $SenderContacts$
```

5. Complete the alert template by selecting your targets and devices.

**Note:** It is not recommended to add a target location. Incoming alerts that have target locations will override locations in the template.

6. Click **Save** and specify a common name.
7. Click **Save**.
8. Create or edit an incoming alert by following the instructions in the "Configure mobile alert settings" section of the *BlackBerry AtHoc Manage Incoming Alerts from the Inbox* guide. In the **Run Alert Template** list, select the alert template you just created, then click **Save**.

You now have the option to forward or trigger other alerts based on an incoming alert.

## Manage alert folders

An alert folder, also known as an alert category, typically corresponds to the type of alerts or source of alerts that are published. For example, folder types can include Weather Alerts, IT Alerts, Commander/CEO Alerts, and Daily News Alerts. Every alert must be associated with an alert folder. Grouping alerts by folder has many benefits, including the ability to use templates to establish a common appearance for all alerts within a folder, facilitate end user subscriptions by folder, and restrict operator publishing privileges to specific folders.

### Access the alert folders manager

The Alert Folders Manager centralizes alert folder configuration and management tasks. Only Administrators can access the Alert Folders Manager.

1. In the navigation bar, click **Alerts**.
2. Click **Alert Folders**. By default, folders display in alphabetical order by name. You can sort by any column.

### Sort and filter folders

To sort by a specific column, click the column heading.

To filter folders by name, complete the following steps:

1. In the navigation bar, click **Alerts**.
2. Click **Alert Folders**.
3. In the **search box**, type letters that the folders contain. Wildcards are not allowed.
4. Click **Search**. Only the folders containing the specified characters display in the table.
5. Optionally, to remove a filter, delete the search pill boxes. All folders are displayed.

### Configure alert folders

You can configure the default settings for alert templates that are associated with an alert folder.

System setup folders can be modified only when accessed from the system setup organization. Enterprise folders can be modified only when accessed from the organizations in which they were created.

**Note:** You cannot select the Weather alert folder, if present. If an alert template is associated with the Weather alert folder, it is moved to the system default folder after a system upgrade to release 7.0.0.2.

1. In the navigation bar, click **Alerts**.
2. Click **Alert Folders**.
3. Click a **folder name**. The Edit Alert Folder window opens and displays the details for the folder.
4. Optionally, edit the folder name or description.
5. Click **Save**.

### Create alert folders

**Note:** Alert folders can be managed at the system, Enterprise, or organization level. Inheritance rules can have an impact on who can use them, so verify that you are creating them at the correct organization level. For more information, refer to “Manage Common Content with Inheritance” in the Enterprise Planning Guide.

**Note:** When you create a new alert folder, it is immediately available for publishing to all end users.

1. In the navigation bar, click **Alerts**.
2. Click **Alert Folders**.


3. Click **New**. The New Alert Folder window opens.
4. In the **Name** text box, type a name.
5. Provide additional information in the **Description** field to further identify the purpose of the new folder.
6. Click **Save**.

## Delete alert folders

Alert templates and alerts are associated with folders. When you delete a folder, a popup screen appears listing the alert templates associated with that folder. The popup gives you the option of exporting the list of affected alert templates to an Excel spreadsheet so that you can modify the alert template details manually and associate each alert template to a new alert folder. You can also click **Confirm** to automatically assign the alert templates to the system default folder. If no alerts or alert templates are associated with an alert folder, no popup window is displayed and the alert folder is deleted.

**Note:** You cannot delete Enterprise folders from within a sub organization.

**Note:** You cannot delete the System Default folder. You can delete the System folder from the System organization.

1. In the navigation bar, click **Alerts**.
2. Click **Alert Folders**.
3. Click  in the row of the alert folder you want to delete.
4. Click **Confirm**.

## Manage delivery templates for devices

All delivery devices use templates to communicate alert messages. For example, the template for a desktop popup window defines the background color, text color, window size, and any default content is included in every alert, such as a "Click here for more information" link.

BlackBerry AtHoc ships with system default templates for different devices, including email and desktop popups, but you can select a different template when publishing an alert or creating or editing an alert template.

Use the Delivery Templates manager to modify existing templates and to create custom templates.


When configuring your organizations in the BlackBerry AtHoc Management System, BlackBerry AtHoc Technical Support will work with you to set up the available delivery devices for alerts, including email, cell phones, and desktop popup windows.

**Note:** The devices for which delivery templates are available in your system depend on the delivery devices and protocols in your BlackBerry AtHoc configuration. For example, not all types of email delivery and phone delivery have templates.

## Access delivery templates

**Note:** Only Administrators can access the Delivery Templates manager. Administrators can only modify delivery templates that have been created within their current organization. All other templates are inherited and are read-only.

To access the Delivery Templates manager, complete the following steps:

1. In the navigation bar, click  icon.
2. In the **Basic** section, click **Delivery Templates**.

The Delivery Templates screen appears and displays the available templates for the selected device type, such as Desktop Popup or All Devices.

Only devices that are enabled for the current organization display in the list. For more information, see "Configure devices" in the *BlackBerry AtHoc System Administrator Configuration Guide*.

The following columns are displayed in the Delivery Templates table:


- Template Name
- Severity
- Device Group—The device type associated with the template: Desktop Popup, Email, or XML feed.
- Organization—The organization the alert was created in. The column displays the phrase *System Setup* if the alert was defined at the system level, an Enterprise name if the alert was defined within an Enterprise organization, and an individual organization's name if the alert was defined within a non-Enterprise organization.
- Locale—The language and region associated with the delivery template.

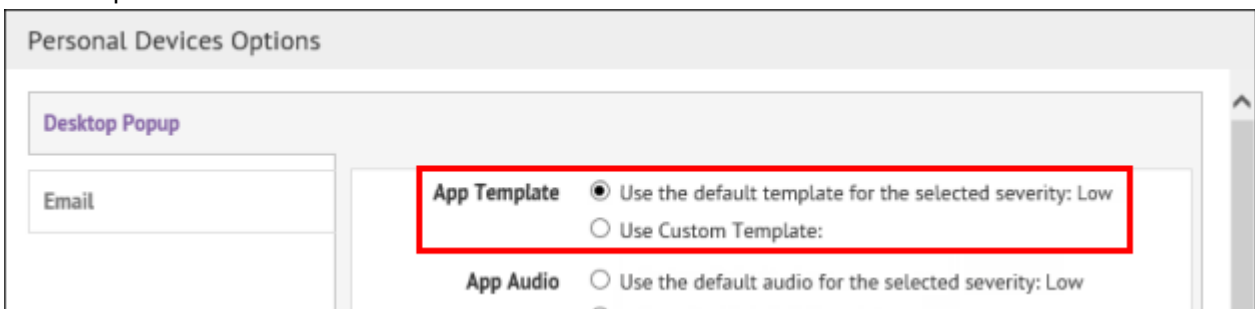
Device delivery templates are customizable for the devices and protocols being used. BlackBerry AtHoc recommends that you edit only the desktop pop-up templates. If you need to update templates for other delivery devices, consult BlackBerry AtHoc Technical Support.

## Create delivery templates

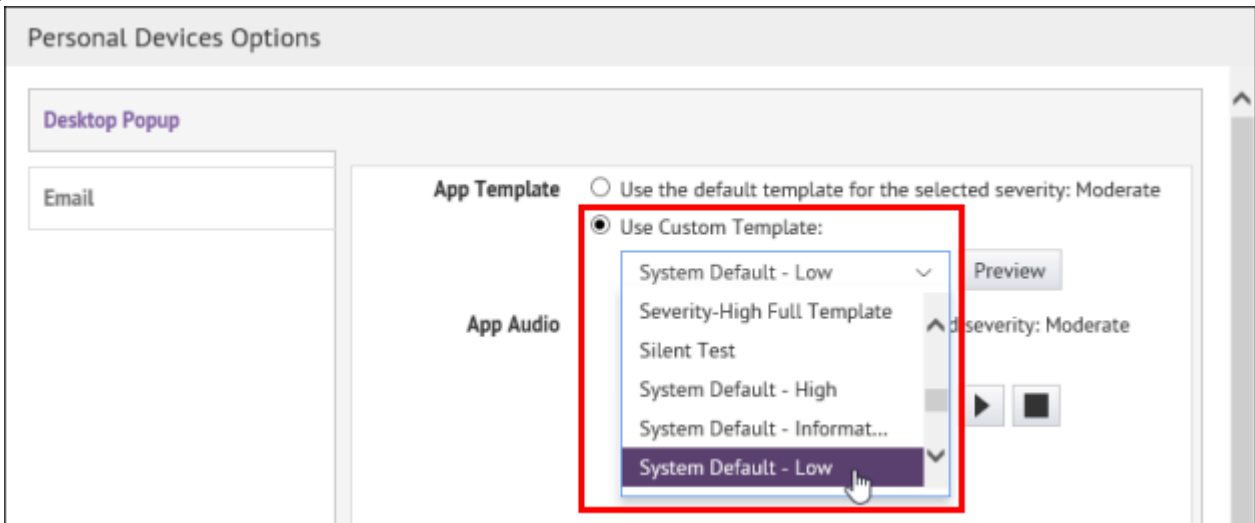
**Note:** Delivery templates can be managed at the system, Enterprise, or organization level. Inheritance rules can change who can use these entities. Verify that you are creating them at the correct organization level in the Enterprise. For more information, see "Manage Common Content with Inheritance" in the BlackBerry AtHoc Enterprise Planning Guide.

The easiest way to create a delivery template is to duplicate an existing one and then edit it. For information on how to duplicate a template, refer to [Duplicate delivery templates](#).

1. In the navigation bar, click  icon.
2. In the **Basic** section, click **Delivery Templates**. The Delivery Templates screen appears.
3. Click **New** in the top corner of the screen and select one of the following options:
  - **Desktop Popup** for alerts that appear on user computer screens.
  - **Email** for alerts that are sent to user email inboxes. If you do not know XML, work with BlackBerry AtHoc Support to configure the template.
  - **XML Feed** for alerts that are send to mass devices such as Giant Voice. If you do not know XML, work with BlackBerry AtHoc Support to configure the template. XML Feed delivery templates are not visible if the XML Feed device is disabled.
4. Enter a **Template Name**, **Description**, and **Common Name** for the template. These should be specific so that users can tell at a glance what the template should be used for.
5. (*Desktop Popup and Email Only*) Click a **Locale** from the list. The language you select will be used by the system if your alert content is in the same language and if the App Template option for the alert is set to use the default template.



6. Select the **Severity** level that corresponds to the delivery template you are creating. Alert creators can later overwrite the severity level by selecting the **Use Custom Template** option on the **Personal Device Options** screen when an alert is created or edited.



7. (*Desktop Popup and Email Only*) Select **Publishing default for severity/locale above** if you want the current delivery template to be used by default whenever an alert is created that matches the severity level and locale that you selected in steps 5 and 6 above.

**Note:** Selecting this check box allows you to create a consistent experience for users across the system. When each alert level is assigned its own color scheme, font styles, and size, for example, it makes it possible to recognize the severity of any received alert by merely glancing at it.

8. If you are creating a Desktop Popup template, select whether to edit the options using the **Standard** controls (buttons and lists) or the **Advanced XSLT** controls. If you do not have much knowledge of XSLT, select **Standard**.

For the XML Feed and Email templates, you do not have the option to work with Standard controls; you can only work with the Advanced XSLT controls.

**Note:** Before working with Advanced XSLT, ensure that you have knowledge about style sheets or work with BlackBerry AtHoc Support to configure the template.

The following additional steps apply only to Desktop Popup templates.

9. Customize the font settings:
- For each element, such as **Title** or **Body**, select **Hide** or **Show** in the **Display** drop-down to specify whether to display the element in the popup.
  - For the text of an element, specify the **Font**, **Font Type**, and font **Size** by selecting options from the drop-down lists and making selections.
  - For the text of an element, specify the color by pointing to it in the color selection panel or entering a hexadecimal color value. Click **Apply**.
10. Choose the **Display** settings:
- Specify the **Border Color** of the pop-up by clicking the drop-down list and selecting a color. Click **Apply** to save the color choice.
  - Select the **Border Size** by clicking the drop-down list and selecting the number of pixels for the width.
  - Select the **Background Color** of the pop-up by clicking the drop-down list and selecting a color. Click **Apply**.
  - In the **Display Size** field, select either the **Full Screen** or **Custom** option.

**Note:** If you create a custom display size, make sure the width is set wide enough to accommodate the Severity, Type, and Location information that appears automatically at the top of the desktop popup when it is sent.

- e. (Optional) Choose a **Logo Position** to help brand your organization. You can position the logo in either the top left or top right of the popup.
- f. Select the **Logo** file using either the system default or click **Browse** to upload a custom file on your file system. The file can be in .png, .gif, or .jpg format.


**11. Specify the Popup Behavior:**

- a. Select a **Location** on the screen where the pop-up will appear, such as the top right corner.
- b. Select a **Timeout** period after which the pop-up will disappear from the desktop. You can specify the value in Seconds, Minutes, Hours, or Days.
- c. Select the **Entrance Motion**, which is how the pop-up will enter the screen. The pop-up will either slide in from the right or left side of the screen.
- d. Select the **Exit Motion**, which is how the pop-up will leave the screen. The pop-up will either slide out the left or right side of the screen.

**12.** Click the **Preview** button to view the pop-up. Make sure the layout, colors, fonts, and font sizes are appropriate for the kind of alert you are creating.


**13.** Click **Save**.

## Duplicate delivery templates

- 1. In the navigation bar, click  icon.
- 2. In the **Basic** section, click **Delivery Templates**. The Delivery Templates screen opens, displaying the templates that are available to use.
- 3. Click the check box beside the template you want to duplicate.
- 4. Click **Duplicate**.
- 5. Click **Duplicate** to confirm. The duplicate template is created with the same name as the original, but with a series of numbers at the end.
- 6. Click **Save**.

## Edit template settings

On the Delivery Templates screen, BlackBerry AtHoc recommends that you edit only the Basic, Styles, and Popup Behavior tabs. Other tabs are for advanced use only.

- 1. In the navigation bar, click  icon.
- 2. In the **Basic** section, click **Delivery Templates**. The Delivery Templates screen appears, displaying the templates that are available to use.
- 3. Click the name of the template you want to edit.

**Note:** As you edit the template, click **Preview** to preview changes to the pop-up. Templates that use the full-screen desktop pop-up option do not display the full screen in the preview window.

- 4. Optionally, edit the **Template Name**, **Description**, and **Common Name** fields for the template.

The following additional options apply only to Desktop Popup templates.

- 5. Optionally, change the **Font** settings:

- a. For each element, such as Title or Body, select **Hide** or **Show** to specify whether to display the element in the pop-up.
- b. For the text of an element, specify the **Font**, **Font Type**, and **Size** by selecting the drop-down lists and making selections.

- c. For the text of an element, specify the color by pointing to it in the color selection panel or entering its hex color in the text box above the panel. Click **Apply**.
6. Optionally, change the **Display** settings:
  - Border Color
  - Border Size
  - Background Color
  - Display Size (Full Screen or Custom)

**Note:** If you create a Custom display size, make sure the width is set wide enough to accommodate the Severity, Type, and Location information that appears automatically at the top of the desktop popup when it is sent.

  - Logo Position
  - Logo
7. Optionally, change the **Popup Behavior** fields:
  - Location (Where the popup appears on the screen)
  - Timeout (How long the popup remains on the screen)
  - Entrance Motion
  - Exit Motion
8. Click **Preview** to view the edited pop-up.
9. Click **Save**.

## Delete delivery templates

1. In the **Delivery Templates** list, select the template to delete.
2. Click **Delete**.
3. Click **OK**.

## Manage audio files

The audio message delivered with an alert can critically affect the way users comprehend the alert message and their subsequent actions. You can configure an audio file to deliver a custom sound with a Desktop alert. Use the Audio Files screen to review the catalog of existing audio files, as well as to add and delete audio files.

### Access the Audio Files screen

**Note:** Only Administrators can access the Audio Files screen.

1. In the navigation bar, click **Alerts**.
2. Click **Audio Files**.

The Audio Files screen opens with the following columns displayed:

- **Audio File Name**—The name associated with the audio file. This can be different from the actual filename. Hover your cursor over a name to view the audio file name and the description of the file.
  - **Scope**—Designates whether the audio file is **Private** or **Global**. Private files are specific to the organization in which they are created. Global files are from the System or Enterprise organization and are available for all child organizations.
  - **ID**—A system-assigned unique ID for the audio file.
  - **Size**—The size of the audio file. The maximum allowed size is 2 MB.
3. Click a file name to display the details for the audio file.

## Sort the audio files list

To sort the audio files by a specific column, click the column heading. The files display in descending order of the values in the selected column. Click the column heading again to sort in ascending order.

## Filter the audio files list

1. In the text box beside the **Find** button, type letters that the audio file name contains. Wildcards are not allowed.
2. To find private files only, click to deselect the **Include Global Audio Files** check box. To find both private and global files, click to select the check box.
3. Click **Find**. Only the audio filenames containing the specified criteria display in the table.
4. To display all audio files again, click **Clear all** under the **Search** button.

## Add audio files

1. In the navigation bar, click **Alerts**.
2. Click **Audio Files**.
3. Click **New**.
4. In the **Audio File Name** field, type a name to associate with the new audio file. The name can be different than the actual filename.
5. In the **Description** field, type a brief description of the audio file, which will help identify the audio file when users search for it. The text should include a description of the file contents or its purpose.
6. To upload the audio file, click **Browse**.
7. On the **Choose File** screen, select the audio file.
8. Click **Save**.

## Edit audio file details

Global files are not available for editing. Private file details can be edited, but the audio track itself cannot be changed after it is uploaded.

To edit the details of a private audio file, complete the following steps:

1. In the navigation bar, click **Alerts**.
2. Click **Audio Files**.
3. In the **Audio Files** table, click to select an audio file. The properties display in an **Edit Audio File** pop-up screen.
4. Change the details in any of the following fields:
  - Audio File Name
  - Description
  - Common name

**Note:** The ID and Size fields cannot be changed.

5. Click **Save**.

## Download audio files

1. In the navigation bar, click **Alerts**.
2. Click **Audio Files**.
3. Select the check box beside the audio file you want to download.
4. Click **More Actions** at the top of the screen.
5. Select **Download** from the drop-down list.
6. On the pop-up screen that appears, choose whether you want to open the selected file immediately or save it to your computer.

## Play audio files

1. In the navigation bar, click **Alerts**.
2. Click **Audio Files**.
3. Select the check box beside the audio file you want to play.
4. Click **More Actions** at the top of the screen.
5. Select **Play** from the drop-down list.

The selected audio file then plays over your computer speakers.

## Delete audio files

Deleting an audio file from the Audio Files screen does not delete the actual .wav file on your computer. It only removes the audio file from the BlackBerry AtHoc server. Only private files can be deleted. Global files are not available for deletion.

1. In the navigation bar, click **Alerts**.
2. Click **Audio Files**.
3. Select the check box beside each audio file you want to delete.
4. Click **Delete** at the top of the screen.

A confirmation popup screen appears, listing each file that can be deleted.

**Note:** Global audio files cannot be deleted and do not appear in the list.

5. Click **OK**.







# Manage map settings

As an Administrator user, you can use the Map Settings screen to set up and configure map defaults, shape layers, and distribution list layers.

## Configuration and setup




The default map view is the view a user sees when they open the live map from the BlackBerry AtHoc home page.

To configure the default map view, complete the following steps:

1. In the navigation bar, click .
2. In the **Basic** section, click **Map Settings**. The Map Settings screen opens.
3. Click . An editable map screen opens.
4. Optionally, click  to select the type of map you want to display by default.
5. Optionally, click  to display users from distribution lists on the live map. You can select up to 10 distribution lists to display.
6. Optionally, click  to change the items that are displayed on the map. You can select to view or not view accountability events from sub organizations, live sent alerts, live incoming alerts, shape layers, and organizations.
7. Click  to refresh the map and review your changes.
8. Click **Apply**. You are returned to the Map Settings screen.
9. Click **Save**.

## Shape layers

The Shape Layers area of the Map Settings screen displays details about each of the shape-related layers that have been configured for maps.

1. In the navigation bar, click .
2. In the **Basic** section, click **Map Settings**. The Map Settings screen opens.
3. Optionally, click and drag  to change the order of existing shape layers.
4. Optionally, to edit an existing shape layer, click . The Update Shape Layer dialog opens. You can update the shape layer name, display color, an selectability status. Click **Save** to save your changes and return to the Map Settings screen.
5. To add a new shape layer, click **Add Shape Layer**. The Add Shape Layer dialog opens.
6. Enter a name for the new shape layer.
7. Click **Select** to select a shape file.
8. Browse to select the shape file on your system.

**Note:** Only shape files that contain Polygons and Multipolygons can be imported. If your shape file contains Point shape files, the file cannot be imported. If you need to display points on a map, you should use an external third party tool to create a polygon buffer around each point, and then import the buffer polygons.


**Note:** The imported shape file should not exceed 100 Mb and should be saved as a ZIP file containing one of each of the following file types: .prj, .dbf, and .shp. BlackBerry AtHoc supports the GCS\_WGS\_1984 Geographical Coordinate System, with the following data:

- Well-known ID: 4326
- Name: GCS\_WGS\_1984
- GCS Data

```
GEOGCS[ "GCS_WGS_1984" , DATUM[ "D_WGS_1984" , SPHEROID[ "WGS_1984" , 6378137.0 , 298.257223563 ] ] ,
```

If your shape file data uses any other geographic coordination system (GCS), open the file in a standard GIS tool. Convert the shape file using the specified GCS values in the table.

9. Optionally, select the check box to make the new shape selectable.


When creating an alert or alert template, a shape layer that is marked as selectable appears in the Select Predefined Locations list and in the Show Layers pop-up (accessed by clicking .) If the layer is not selectable, it appears in the Show Layers pop-up, but does not appear in the Select Predefined Locations list.


10. Select a color from the list. The default is red.
11. Click **Add**. You are returned to the Map Settings screen.
12. Click **Save**.

## Distribution list layers

The Distribution List Layers section of the Map Settings screen displays details about each of the distribution list layers that have been configured for maps.

To create a new distribution list layer, complete the following steps:

1. In the navigation bar, click .
2. In the **Basic** section, click **Map Settings**.
3. In the **Distribution List Layers** section, click **Add Distribution List**. The Distribution Lists dialog opens.
4. On the **All Distribution Lists** tab, select the check boxes to display static or dynamic distribution lists. You can also use the search field to narrow the distribution lists that are displayed.
5. Select the check boxes beside the distribution lists you want to add. You can add up to 10 distribution lists.
6. Click **Apply**. You are returned to the Map Settings screen.

7. Select a color from the palette for each new distribution list. The default color is blue.
8. Optionally, click **X** to remove a distribution list from the distribution list layer.
9. Optionally, click and drag  to change the order of distribution lists.
10. Click **Save**.

# BlackBerry AtHoc customer portal

BlackBerry AtHoc customers can obtain more information about BlackBerry AtHoc products or get answers to questions about their BlackBerry AtHoc systems through the Customer Portal:

<https://support.athoc.com/customer-support-portal.html>

The BlackBerry AtHoc Customer Portal also provides support via computer-based training, Operator checklists, best practice resources, reference manuals, and users guides.

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