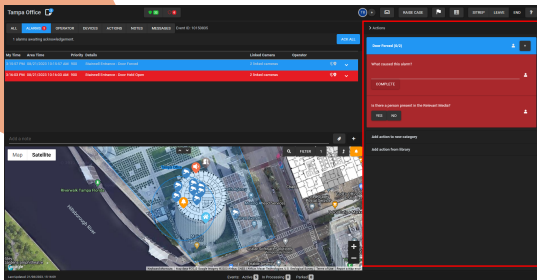


# Action Plan Feature Overview

## OVERVIEW

Action Plans are SureView's approach to Standard Operating Procedures (SOPs), providing operators with dynamic, non-linear guidance when responding to alarm events. These configurable action lists offer clear procedural guidance while maintaining flexibility to adapt to specific situations.



## CORE PURPOSE

Action Plans simplify incident response by providing operators with step-by-step instructions and guidance that are automatically triggered based on the type of alarm or individual alarm point being handled.

## BENEFITS

The key benefits that action plans provide to security operations are:

- **Standardization:** Ensures consistent response procedures across all operators
- **Flexibility:** Adapts to specific situations through conditional logic and dynamic action addition
- **Collaboration:** Supports multi-operator response with clear task assignment
- **Accountability:** Complete audit trail of all actions taken and by whom
- **Efficiency:** Guides operators through complex procedures without requiring memorization
- **Scalability:** Easy to update and maintain procedures as needs change

## KEY FEATURES

### Non-Linear Architecture

Unlike traditional linear SOPs, Action Plans are designed to be non-linear, allowing:

- Branching logic based on operator input
- Flexible response paths that adapt to circumstances
- Dynamic addition of procedures mid-event

### Conditional Logic Flow

Action Plans support branching logic that presents different paths based on operator responses. For example, answering "Is there a person present in the Relevant Media?" will trigger different subsequent steps depending on whether the operator selects Yes or No. This conditional logic allows Action Plans to adapt to the specific circumstances of each event.

### Enforce procedures with Required vs Optional Steps

Administrators can assign action plan steps as either required or optional. This feature enables teams to enforce a minimum set of steps that must be completed when addressing a specific event. Required steps are highlighted in red, while optional steps appear on a standard black background. Events cannot be closed until all required steps are completed.

### Event Collaboration

Individual action steps or entire action plans can be assigned to specific users to complete. This is particularly valuable when multiple operators collaborate on a single alarm event. This ensures clear task ownership, accountability, and prevents duplication or confusion.

### Event Association

Action Plans are automatically assigned to events based on:

- Event type
- Individual alarm point configuration
- Administrator-defined Automate rules and triggers



## ACTION STEP TYPES

Various types of action steps can be created to support different scenarios. Teams can use these step types to build both simple and complex workflows. Supported action steps include:

### 1 Basic

Shows a message to the operator with a checkbox that must be checked to proceed. Used for simple acknowledgments and confirmations.

### 2 Yes/No

Presents a yes-or-no question to the operator, often used with conditional "Action Triggers" to build branching logic paths in the Action Plan.

### 3 Input

A basic text box that prompts the user to enter text in response to a question.

### 4 URL

Displays a clickable link to the operator. Supports various

- URL formats, including:
- Standard web addresses
- Internal intranet addresses
- Mailto email links

### 5 CALL CONTACT

Shows a list of contacts for a specific role (e.g., "First Aider") with their contact details, making it easier to reach the right personnel.

### 6 Download SitRep

Provides the operator with a "Download Situation Report" button to generate and download incident documentation.

### 7 Raise to Case Management

Provides a button to escalate the event to SureView Cases with a summary note. Note: Only applicable to customers with a SureView Cases account.

### 8 Choices

Offers a predefined list of options for an operator to choose from in response to a question. This list can be displayed as a listbox or a set of buttons.

### 9 Event Outcome

Allows administrators to specify the event outcome chosen based on steps taken in the action plan. This can include adding an optional note and automatically closing the event when this step is selected.

### 10 Change Priority

This feature enables the operator to update event priorities on the fly. It is useful when operators are returning events to the queue and need to quickly specify the incident's severity.

The screenshot displays the 'Actions' section of the SureView interface. It features a blue header bar with the text 'Medical (0/5)' and a plus icon. Below this, a section titled 'Please contact: First Aider' contains a table with contact information for Jane Moran, including her full name, telephone number (457-897-8975), and email address (jane.moran@acme.com). A 'CLOSE' button is located below the table. The next section, 'Describe the severity of the medical incident', has a dropdown menu with options: Low, Medium, High, and Critical. Below this is a section titled 'Does the priority of this event need to change?' which includes a sub-header 'Allows the operators to increase/decrease the priority of the event'. It shows the 'Current Event Priority' as 1000 and a 'New Priority' input field with the value 1000. A 'CHANGE PRIORITY' button is at the bottom of this section. The final section is a checkbox labeled 'If appropriate: Call 911 and request ambulance. See Area details for building address'. At the very bottom, there is a section titled 'Was the person(s) involved transported to hospital?' with 'YES' and 'NO' radio button options.



## ABOUT SUREVIEW SYSTEMS

SureView Systems is a global provider of software that improves the ability of security operation centers to manage and respond to security events. SureView is deployed successfully in a wide variety of environments including law enforcement, transportation, critical infrastructure and commercial organizations. SureView supports the largest integration library in the industry, enabling ease of deployment and system administration for a wide variety of organizations across the globe. SureView Systems is an ISO27001 certified company and software is compliant with the most demanding corporate standards for IT and Networking security.

### More Information.

For more information please contact SureView at 1-888-387-2860 or visit us [www.SureViewSystems.com](http://www.SureViewSystems.com)