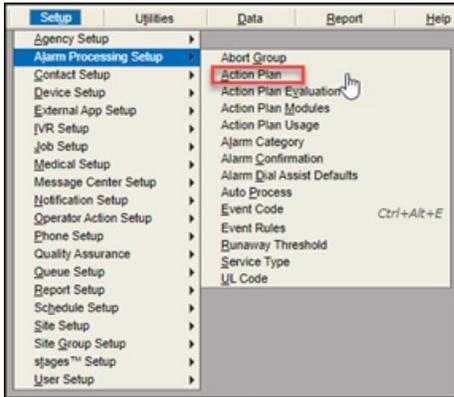


Action Plan Creation

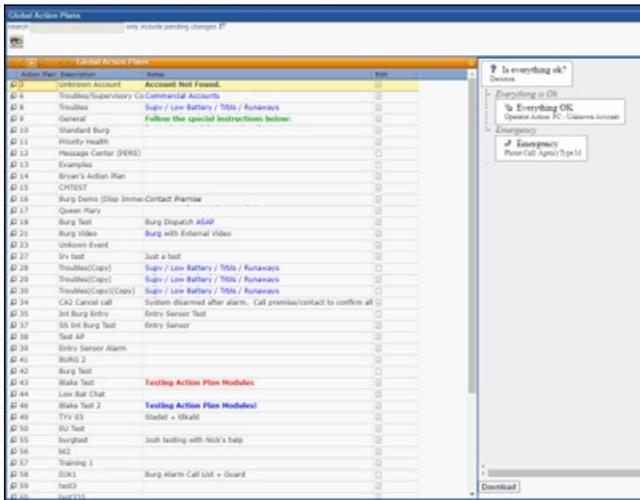
Last Modified on 10/26/2023 1:24 pm EDT

Creating an Action Plan

- Navigate to Setup>Alarm Processing Setup>Action Plan.



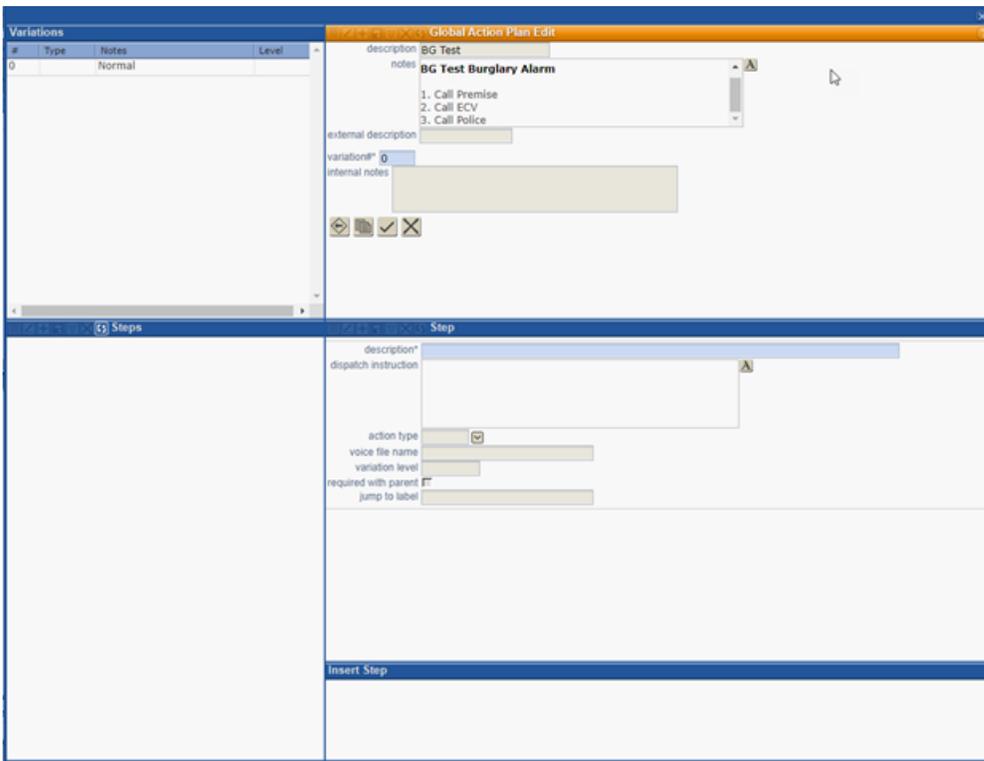
- Click the binoculars (This provides a list of existing Actions Plans)
- Click the + to add a new Action Plan (NOTE: This creates an Action Plan on a Global level). Add a brief name for the Description.



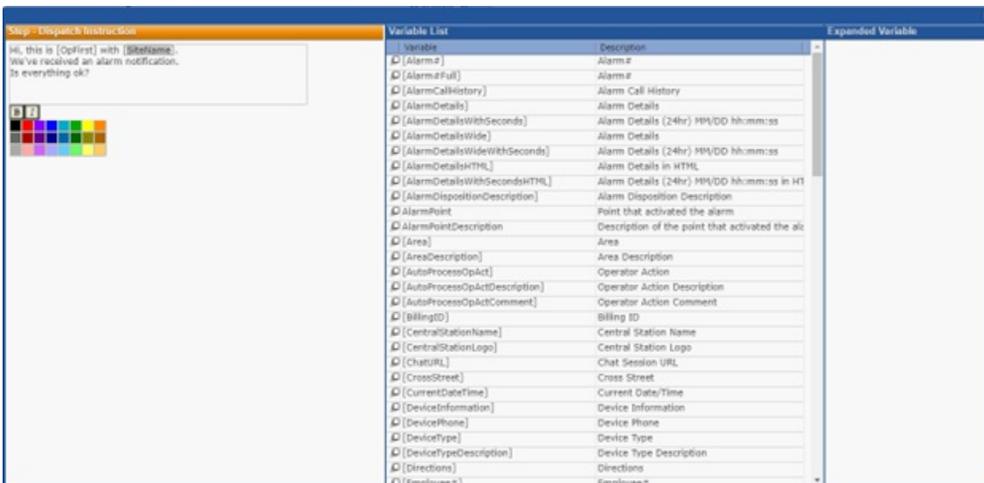
- Add a brief name for the Description.
- Click the A to add notes (such as steps); click Save icon.



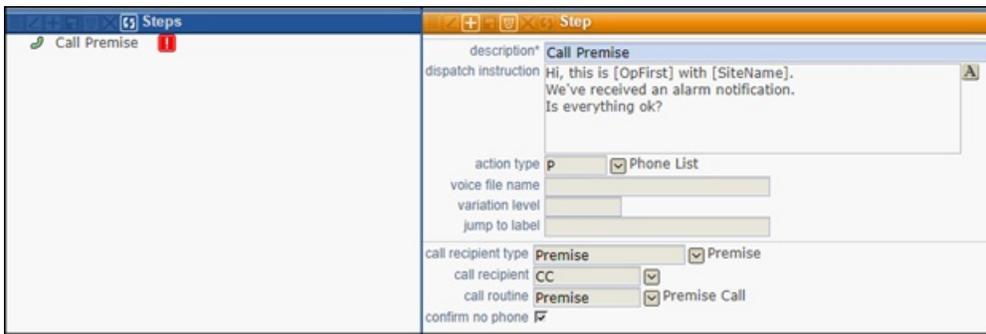
- An edit screen will display. This is where Action Plan steps will be built out.



- Navigate to the **Step** section. This is for the first step (**Call Premise**).
 - **Description:** type Call Premise.
 - **Dispatch Instructions:** Select from pre-built Variable lists to build a script for the operator for this step.



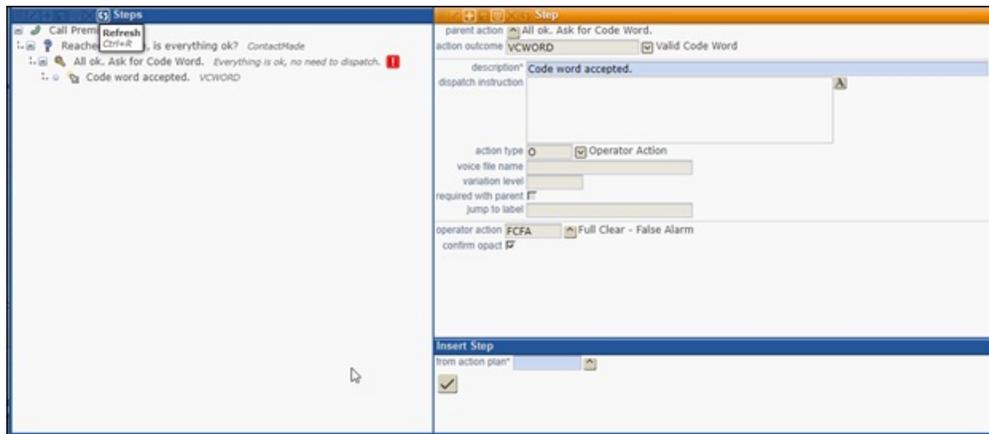
- Select an **Action Type** from the drop-down menu.
- **Call recipient type:** Should be the step you are working on.
- **Call recipient:** Select, if needed.
- **Call routine:** Should be the step you are working on.
- Enable **Confirm no Phone**.
- Click **Save** icon.
- You will begin to see the steps built out on the left side.



- **Insert Step**

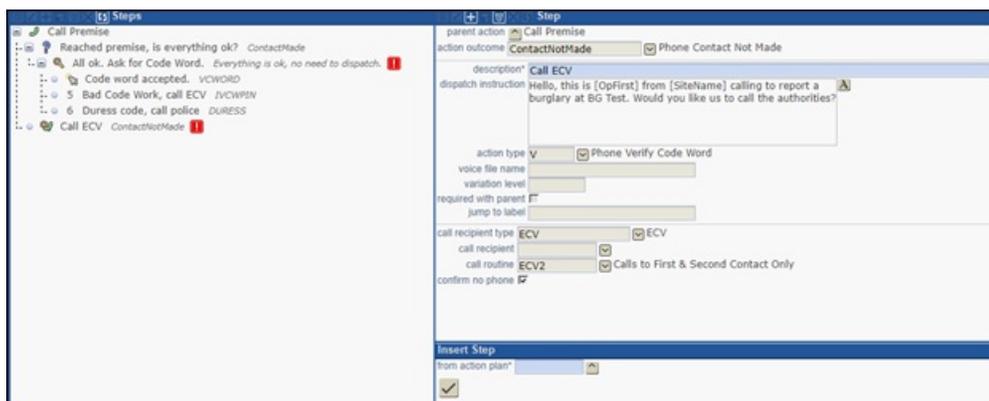
- **Insert Step** allows you to build out multiple steps. In this instance, there are two outcomes to **Call Premise**,
- **Outcome 1 - Premise Call answered**

- Click the + sign to create action outcomes.
- Example of Action Plan - Premise Call answered:



- To add another outcome to your Action Plan, click on the section in the steps (left hand side) that the operator needs to complete an action on.
- Click the + sign to add the other outcome.
- **Outcome 2 - Premise call answered, contact gave wrong code word.**

- Type **AllElse** in the Action Outcome field. This will display different outcomes to choose from.
- Keep adding Action Outcomes as noted above.



- Once done, go to **Global Action Plan Edit**.

- Click the checkmark to activate the **Action Plan**.
- You can now add this **Action Plan** to a Site Group, etc.

To Edit the Action Plan:

- Locate the Action Plan you'd like to edit.
- Click the pencil icon.
- Make changes.
- Save icon.
- Click the checkmark to activate the changes to that Action Plan.