



# **BlackBerry AtHoc**

## **AtHoc Situation Response**

7.18



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# What is AtHoc Situation Response?

AtHoc® Situation Response provides a centralized approach to critical event management to properly plan, manage, and remediate crises and improve business continuity. AtHoc Situation Response provides the following benefits:

- **Efficient plan management:** Create and review plans before a crisis occurs.
- **Increased plan awareness:** Engage with stakeholders through the plan review process.
- **Reduced time to respond:** When a crisis occurs, create an incident from a predefined and approved plan.
- **Single view for situation awareness:** View the alerts, accountability events, and collaborations associated with an incident.
- **Ease of regulatory compliance:** Review and archiving functions provide a trackable process.

## Key use cases

- **Planning and predictive readiness:** Plan for incidents and risks.
- **Incident and disaster response:** Respond within and across organizations.
- **Situational awareness:** View context-rich information.
- **Mission orchestration:** Secure special events and execute mission-oriented tasks.
- **Secure information sharing:** Share real-time peer-to-peer and group collaborations, files, and audio.
- **Audit and continuous learning:** Audit and learn from past responses.

## Roles

Operators with the following AtHoc Situation Response roles can perform the listed tasks in the BlackBerry AtHoc management system and mobile app.

**Note:** Enterprise Administrators and Organization Administrators can also perform any of the following tasks.

### Plan Manager

- Create a new plan
- Edit a plan
- Delete a plan
- Duplicate a plan
- Disable a plan
- Enable a plan
- Approve a plan
- View active plans
- Create an incident
- Edit an incident
- Publish an incident
- View activity
- Export activity log
- Add new entry in activity log
- Activate plan steps
- Start a collaboration
- View and participate in collaborations

- End a collaboration
- Export ended collaborations

### **Plan Incident Manager**

- View plans in read-only mode
- Create an incident
- Edit a draft incident
- End an incident
- Publish an incident
- View activity
- Export activity log
- Add new entry in activity log
- Export an incident
- Activate plan steps
- Start a Collaboration
- View and participate in collaborations
- End a collaboration
- Export ended collaborations

### **Collaboration Manager**

- Start a collaboration
- View and participate in collaborations
- End a collaboration
- Export ended collaborations

# Plan and Respond


Before a crisis, use AtHoc Situation Response to create plans, assign reviewers to plans, and send plans through the review process. During a crisis, create an incident based on your previously reviewed plan. You can also make adjustments to a plan during an incident to respond to events as they occur.

## Plan states

This section describes the four states of a plan.

- **Draft:** The plan has been saved, but is not yet approved.
- **Active:** The plan has been approved and can be used to create an incident.
- **Disabled:** The plan cannot be used to create an incident. Any plan that is in the active state can be disabled. You can enable a disabled plan.
- **Archived:** Any plan that is in the active state can be archived. When a plan is archived, it becomes read-only and cannot be reenabled.

## Enable AtHoc Situation Response in BlackBerry AtHoc

1. Log in to the BlackBerry AtHoc management system as a System Administrator.
2. Click .
3. In the **System Setup** section, click **Feature Enablement**.
4. On the **Feature Enablement** screen, click the **IsSituationResponseSupported** row.
5. On the **Edit Feature Enablement** window, from the **Enabled** list, select **True**.
6. Click **Save**.
7. On the **Feature Enablement** screen, click the **IsCollaborationSupported** row.
8. On the **Edit Feature Enablement** window, from the **Enabled** list, select **True**.
9. Optionally, to enable adding attachment steps in plans, in the **Feature Enablement** screen, click the **IsAttachmentsSupported** row.
10. On the **Edit Feature Enablement** window, from the **Enabled** list, select **True**.
11. Click **Save**.

AtHoc Situation Response is enabled.

**Note:** You may need to log out of the BlackBerry AtHoc management system and log back in to see the Plan and Collaborate tabs in the navigation bar.

## Create a plan

**Tip:** To create a new plan from an existing plan, see [Manage plans in the Plan Manager](#).

### Before you begin:

- AtHoc Situation Response must be enabled. See [Enable Situation Response in BlackBerry AtHoc](#).
- You must be an Enterprise Administrator, Organization Administrator, or Plan Manager to create a new plan.
- Create any alert and event templates that you want to use in the plan.

1. Log in to the BlackBerry AtHoc management system as a Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Do one of the following:
  - In the navigation bar, click **Plan > New Plan**.
  - In the navigation bar, click **Plan > Plan Manager > New**.
3. On the **New Plan** page, in the **Summary** section, select a **Category** from the list.
4. In the **Summary** section, enter a plan name.
5. Optionally, enter a description. The maximum number of characters is 200.
6. In the **Expected Duration** section, select the number of days, hours, and minutes.
7. Optionally, in the **Location** section, click **Add** to include a location for the plan.
  - a) On the **Full Map** screen, select a predefined location or create a custom location.
  - b) Click **Apply**.

**Note:** The map appears as a read-only map on the plan summary. This map cannot be used for targeting alerts or events.
8. Optionally, in the **Reviewers** section, click **Add Reviewers** to add additional reviewers.
  - a) On the **Add Reviewers** screen, select available reviewers.
  - b) Click **Apply**.

Any operator in the organization can be added as a plan reviewer. External operators cannot be added as plan reviewers.
9. Optionally, click **Set Approver** to change the default plan approver. The Plan Manager who creates the plan is the plan approver by default.
  - a) On the **Choose Approver** window, select a plan approver. Only Plan Managers, Enterprise Administrators, and Organization Administrators and who have not been added as a plan reviewer can be selected as the plan approver.
  - b) Click **Apply**.
10. In the **Steps** section, select a plan type from the **Select Type** list. Select from the following step types:
  - **Create Alert:** Select an alert template from the pull-down list that appears. Only alert templates that are ready to publish appear in the list.
  - **Create Attachment:** Add up to 5 attachments totaling up to 1 MB. Click **View/Add Attachments**. In the **View/Add Attachments** window, drag files or click **Browse** and then browse to and select the files you want to add and then click **Apply**.
  - **Create Collaboration:** Click **Set Users & Groups**. In the **Set Users & Groups** window, select the **Users or Groups** tab, select the users or distribution lists you want to include in the collaboration, and then click **Apply**. Only users who have registered on the BlackBerry AtHoc mobile app can be added to the collaboration.
  - **Create Event:** Select an accountability event template from the pull-down list that appears. Only event templates that are ready to publish appear in the list.
  - **Free Text:** Enter a maximum of 4000 characters of text.
11. Optionally, for alert and event steps, click **Preview** to open a window that displays the details of the selected alert or event template.
12. Optionally, for collaboration steps, click **Preview** to open a dialog that displays the users and groups who have been invited to join the collaboration.
13. In the **Steps** section, enter a **Step Name**.


For alert and event type steps, when you select the template, the Step Name field is automatically populated with the name of the template. You can edit this field.
14. Optionally, enter a step description. The maximum number of characters is 200.



## 15. Click **Save**.

The plan is created and can be viewed and edited in the Plan Manager. The plan has a draft status and cannot be used to create an incident until the plan has been reviewed and approved.

## Review a plan

After a Plan Manager creates a plan, assigns reviewers and an approver, the plan is ready to begin the review process. When the plan owner assigns a reviewer to a plan, a **Plan(s) to Review** link appears on the BlackBerry AtHoc home page for that reviewer. The plan reviewers review each step in the plan and can create change requests for the plan or for specific steps in the plan. A  appears beside the name of the reviewer on the plan summary screen in the **Reviewers** section to indicate that the reviewer has submitted a change request for the plan.

When a reviewer creates a change request, the plan owner can access the plan summary page and choose to acknowledge or reject the request. When the plan owner acknowledges or rejects all change requests, the plan reviewers can mark the plan as reviewed. When all reviewers have marked the plan as reviewed, the plan appears in the **Plans waiting for me** list of the plan approver.


**Note:** If the plan owner edits the plan when it is in draft state, the review process resets and the plan reviewers must mark the plan as reviewed again before the plan can be approved.

When the plan is approved, it moves to the active state and can be used to create incidents.

If you have been added as a reviewer for a plan, access the plans you need to review from the Plan Manager or from the **Plan(s) to Review** link on the BlackBerry AtHoc home page. When you review the plan, you can request a general change for the plan or for a specific step in the plan.

**Tip:** You can see if you have plans that require your review or approval on the BlackBerry AtHoc home page in the right pane below the system status. Click the **Plan(s) to Review** link to go directly to the plans waiting for your review or approval in the Plan Manager.

1. Log in to the BlackBerry AtHoc management system as a Plan Manager.
2. Click **Plan > Plan Manager**.
3. On the **Plans** page, click **All Plans > Show plans waiting on me**.
4. Click the plan you want to review.
5. Review each step in the plan.



**Tip:** For alert and event steps, click  to expand the details of the step and then click the name of the template to preview the template content. For collaborate steps, click the link to view the users and groups who were invited to the collaboration.

6. Optionally, [Create a general change request](#).
7. Optionally, [Request a change to a step](#).


Your change requests are added to the **Change Requests** section. When the plan owner reviews and accepts or rejects your change requests, you can [Mark a plan as reviewed](#).



### Create a general change request

1. On the **Plan** page, click **General Change Request**.
2. On the **Create Change Request** dialog, enter your change in the **Comment** field.
3. Click **Create**.

Your general change request is added to the **Change Requests** section. A  appears beside your name in the **Reviewers** section to indicate that you have an open change request for the plan. When the plan owner acknowledges or rejects your change requests, the  is removed.





### Request a change to a step



1. On the **Plan** page, click  beside the step you are requesting a change for.
2. On the **Create Change Request** dialog, enter your change in the **Comment** field.
3. Click **Create**.

Your step change request is added to the **Change Requests** section. A  appears beside your name in the **Reviewers** section to indicate that you have an open change request for the plan. When the plan approver acknowledges or rejects your change request, the  is removed.

### Review plan change requests



If you are a plan owner, you can review and acknowledge or reject all change requests for a plan.

1. On the **Plan Manager** page, click the plan you want to review.
2. On the **plan summary page**, view the **Change Requests** section.  
If there are open change requests, a number appears beside the **Change Requests** section title. Click the number to display only the open change requests. Each change request includes the title of the step, the text of the change request, the reviewer who opened the change request, and a date and timestamp for when the change request was submitted.
3. Optionally, to filter the change requests list to display only general change requests, click .
4. Optionally, to filter the change requests list to display only change requests for a specific step, click  in that step.
5. Click **Edit**.
6. In the **Change Requests** section, review the content of the change request.
7. Click  to acknowledge the change request, or  to reject it.

Acknowledged change requests display a . Rejected change requests display a . When all change requests for a plan are accepted or rejected and the plan approver approves the plan, the plan moves to the active state and can be used to create incidents.

### View the list of reviewers

1. Log in to the BlackBerry AtHoc management system as Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Plan Manager**.
3. On the **Plans** page, click the plan you want to review.
4. On the plan details page, view the reviewers in the **Reviewers** section.

A  appears beside the name of any reviewer who has an open change request for the plan. A  appears beside name of any reviewer who has marked the plan as reviewed.

### Add or remove reviewers

A plan owner can add or remove reviewers from plans that are in a draft state.

1. Log in to the BlackBerry AtHoc management system as a Plan Manager, Organization Administrator, or Enterprise Administrator.

2. Click **Plan > Plan Manager**.
3. On the **Plans** page, click the plan that you want to modify.
4. On the plan details page, click **Edit**.
5. In the **Reviewers** section, do one of the following:
  - Click **Add Reviewers** to add additional reviewers.
  - Click **X** beside the name of a reviewer to remove them.
6. Optionally, in the **Reviewers** section, click **X** beside a reviewer to remove them from the plan.
7. Click **Save**.

## Mark a plan as reviewed

When the plan owner accepts or rejects all change requests associated with a plan, the plan reviewers can then submit additional change requests or mark the plan as reviewed.

1. Log in to the BlackBerry AtHoc management system as a Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Plan Manager**.  
You can also click the **Plan(s) to Review** link on the BlackBerry AtHoc home page to access plans that are waiting for your review.
3. On the **Plans** page, click the plan you want to mark as reviewed.
4. On the **Plan Summary page**, click **Mark as Reviewed**.

## Edit a Plan

A plan owner can edit a plan that is in draft state. If the plan owner edits the plan after reviewers have marked the plan as reviewed, the review process resets and the plan reviewers must mark the plan as reviewed before the plan can be approved.

1. Log in to the BlackBerry AtHoc management system as a Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Plan Manager**.
3. Click the plan you want to edit.
4. On the **Plan Summary page**, click **Edit**.

The following sections can be edited:

- Category
- Name
- Description
- Expected Duration
- Location

The following actions can be performed:

- [Add or remove reviewers](#)
- [Add, edit, delete, or reorder steps](#)

5. Click **Save**.

## Add, edit, delete, or reorder steps

Plans that are in draft state can be edited and the plan owner can add, edit, delete, or reorder the steps in the plan.

1. Log in to the BlackBerry AtHoc management system as a Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Plan Manager**.
3. Click the plan that you want to edit.
4. On the plan details page, click **Edit**.
5. In the **Steps** section, do any of the following:
  - Click **Add Steps** to add a step.
  - Click **X** beside a step to remove it.
  - Click and drag **≡** beside a step to move the step to a new position in the plan.
  - Click to edit the title, description, or type for a step.
6. Click **Save**.

## Approve a plan

When all reviewers for a plan mark the plan as reviewed, the plan is ready to be approved and moved to the active state.

1. Log in to the BlackBerry AtHoc management system as a Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Plan Manager**.  
You can also click the **Plan(s) to Approve** link on the BlackBerry AtHoc home page to access plans that are waiting for your approval.
3. On the **Plans** page, click the plan that you want to approve.
4. On the plan details page, click **Approve**.

Your approval is saved. If all reviewers mark the plan as approved, the plan is moved to the active state and can be used to create incidents.


## Manage plans in the Plan Manager

Use the Plan Manager screen to create new plans, and to delete, duplicate, archive, disable, or enable existing plans.

1. Log in to the BlackBerry AtHoc management system as a Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Plan Manager**.
3. Optionally, click **All Plans** and select **Show plans created by me** or **Show plans waiting on me** to filter the list of plans.
4. Optionally, click **New** to create a new plan. For details, see [Create a plan](#).
5. Optionally, select one more plans and click **More Actions** to complete any of the following actions:
  - **Delete:** Draft and archived plans can be deleted. Active plans cannot be deleted.
  - **Duplicate:** Only one plan can be duplicated at a time. Draft, active, and archived plans can be duplicated. When a plan is duplicated, all details from the original plan are duplicated. The duplicate plan is created in the draft state.
  - **Archive:** Only active plans can be archived. When an plan is archived, it cannot be re-enabled and incidents cannot be created using it.
  - **Disable:** Only active plans can be disabled.



- **Enable:** Only disabled plans can be enabled.

## Search for a plan

1. Log in to the BlackBerry AtHoc management system as a Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Plan Manager**.
3. Optionally, click **All Plans** and select **Show plans created by me** or **Show plans waiting on me**.
4. On the **Plans** page, enter a plan name in the **Search by Title** field and click .

## Create an incident

Plans that are in an active state can be used to create an incident.

1. Log in to the BlackBerry AtHoc management system as a Plan Manager, Plan Incident Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Incident Manager**.
3. On the **Incidents** page, click **New Incident**.
4. On the **New Incident** page, select an active plan from the **Plan** list. The Title field automatically populates with the name of the plan. This field is editable. You can enter a title that is between 3 and 100 characters.
5. Optionally, in the **Description** field, enter a description. The maximum length is 200 characters.
6. In the **Expected Duration** section, select the number of days, hours, and minutes.
7. Optionally, click  and drag to change the order of steps.
8. Optionally, for alert and event steps, click **Preview** to open a window that displays the details of the selected alert or event template.
9. Optionally, for collaboration steps, click **Preview** to open a dialog that displays the users and groups who have been invited to join the collaboration.
10. Optionally, [add steps to the plan](#).
11. Click **Review and Create**.
12. On the **Review and Create** page, review the content.
13. Optionally, on the **Review and Create** page, for alert and event steps, click  to expand the details of the step and then click the name of the template to preview the template content. For collaborate steps, click the link to view the users and groups who were invited to the collaboration.
14. Click **Create**.

The incident is live and is added to the incident manager. Plan Incident Managers, Plan Managers, Organization Administrators and Enterprise Administrators can now [Activate plan steps](#), [View plan progress](#), [Track the status of plan steps](#), [Enable, disable, or end steps](#), or [Add steps to a plan](#).

### Activate plan steps

1. Log in to the BlackBerry AtHoc management system as a Plan Incident Manager, Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Incident Manager**.
3. On the **Incidents** page, optionally, select **Live Incidents** to filter the list of incidents.
4. Select the plan incident you want to activate the steps for.

5. On the incident details page, optionally, for alert and event steps, click ▶ to expand the details of the step and then click the name of the template to preview the template content. For collaborate steps, click the link to view the users and groups who were invited to the collaboration.
6. Do one of the following:
  - For Event or Collaboration steps, click **Run**.
  - For Alert steps:
    - a. Click **Edit/Publish**.
    - b. On the alert details page, modify any section as needed.
    - c. Click **Review and Publish**.
    - d. On the **Review and Publish** screen, click **Publish**.
    - e. Click **Close** to return to the incident details page.

The **Completion** bar in the **Progress** section updates as each step is activated. The **Pace** section displays the difference between the expected duration of the plan measured against the actual duration. The **At A Glance** section display details about each step that has been activated and run. Click the link next to an alert or event step to view more details in the BlackBerry AtHoc management system. Click the link next to a collaborate step to open the collaboration in a new tab on your browser.

### View plan progress

1. Log in to the BlackBerry AtHoc management system as a Plan Incident Manager, Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Incident Manager**.
3. Optionally, select **Live Incidents** to filter the list of incidents.
4. Select the incident you want to view the progress for.
5. On the incident details page, see the **Completion** bar in the **Progress** section.
6. Optionally, view the difference between the expected and actual duration of the plan in the **Pace** section.
7. Optionally, view the details about each step that has been activated and run in the **At A Glance** section. Click the link next to an alert or event step to view more details.

### Track the status of plan steps



1. Log in to the BlackBerry AtHoc management system as a Plan Incident Manager, Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Incident Manager**.
3. Optionally, select **Live Incidents** to filter the list of incidents.
4. Select the incident that you want to track the status of steps for.
5. On the **All Incidents > incident-name** screen, see the **At a Glance** section. This section lists the type, title, time of creation, and current status for each step in the incident. You can click the link next to an alert or event step to view more details in the BlackBerry AtHoc management system. You can click the link next to a collaborate step to open the collaboration in a new tab on your browser.

### Enable, disable, or end steps

When an incident is live, the Plan Manager can enable, end, and disable steps in the plan. All steps are enabled by default.


**Note:** No actions can be performed on Free Text steps.

1. Log in to the BlackBerry AtHoc management system as a Plan Manager, Organization Administrator, or Enterprise Administrator.

2. Click **Plan > Incident Manager**.
3. Optionally, select **Live Incidents** to filter the list of incidents.
4. Select the incident that you want to enable or disable steps for.
5. On the incident details page, click , , or **End** for each step.  
Disabled steps cannot be activated. Disabled steps can be enabled. Enabled steps can be activated. Activated steps can be ended.

## Add steps to a plan

When an incident is in a draft state, additional steps can be added to it before it is published. To add steps to a live incident, see [Add steps](#).

1. Log in to the BlackBerry AtHoc management system as a Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Incident Manager**.
3. Select the incident that you want to add steps to.
4. In the **Steps** section, click **Add Step**.
5. Optionally, click  and drag the step to a different position in the incident.
6. Do one of the following:
  - Click **Save Draft**.
  - Click **Review and Create**.

## View incidents in the Incident Manager

1. Log in to the BlackBerry AtHoc management system as a Plan Incident Manager, Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Incident Manager**.
3. Optionally, click **All Incidents** and select any of the following options to filter the list of incidents:
  - **Draft Incidents**
  - **Live Incidents**
  - **Ended Incidents**
4. Click any incident to open the incident details page.

### View a live incident

1. Log in to the BlackBerry AtHoc management system as a Plan Incident Manager, Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Incident Manager**.
3. Click **All Incidents > Live Incidents**.
4. Click any incident to open the incident details page.
5. Optionally, for any alert or event step, expand the step and click the template link to preview the template content. For collaborate steps, click the link to view the users and groups who were invited to the collaboration.

### Add steps



You can add steps to an incident when it is live. To add steps to a draft incident, see [Add steps to a plan](#).

1. Log in to the BlackBerry AtHoc management system as a Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Incident Manager**.
3. Optionally, select **Live Incidents** to filter the list of incidents.
4. Select the incident that you want to add steps to.
5. On the incident details page, click **Add Step** and select one of the following step types:
  - **Alert**
  - **Attachment**
  - **Collaboration**
  - **Event**
  - **Free Text**
6. On the **Add Step** window, do one of the following:
  - For an **Alert** step, select an alert template from the list. Only alert templates that are ready to publish appear in the list. Click **Preview** to open a window that displays the details of the selected template.
  - For an **Event** step, select an event template from the list. Only event templates that are ready to publish appear in the list. Click **Preview** to open a window that displays the details of the selected template.
  - For an **Attachment** step, click **View/Add Attachments**. On the **View/Add Attachments** window, drag files or click **Browse** and then browse to and select the files you want to add. You can add up to 5 attachments totaling up to 1 MB. Click **Apply**.
  - For a **Collaboration** step, click **Set Users & Groups**. On the **Set Users & Groups** window, select the **Users** or **Groups** tab. Select the users or distribution lists you want to include in the collaboration, and then click **Apply**. Only users who have registered on the BlackBerry AtHoc mobile app or operators who have registered on the Collaboration page in the BlackBerry AtHoc management system can be added to the collaboration.
  - For a **Free Text** step, in the **Free text instructions** field, enter a maximum of 4000 characters of text.
7. On the **Add Step** window, enter a step name. For alert and event steps, the **Step Name** field is automatically populated with the name of the selected template. You can edit this field.
8. Optionally, enter a step description. The maximum number of characters is 200.
9. Click **Add**.

The step is added to the live incident and can be activated.

### View the status of all steps

You can view the status of all steps for a live incident from the incident manager.

1. Log in to the BlackBerry AtHoc management system as a Plan Incident Manager, Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Incident Manager**.
3. Optionally, from the **All Incidents** list, select **Live Incidents** to filter the list of incidents.
4. Select the incident that you want to view the status of the steps for.
5. Optionally, on the incident details page, view the status of each step below the **Summary** section. Steps in the incident that have been activated and completed display a **Completed** status. Enabled steps display a . Disabled steps display a .
6. Optionally, view the overall status of all steps in the incident in the **Progress** section. The **Completion** bar indicates the percentage of steps that have been completed in the incident. The **Progress** section also displays when the incident was started and if any steps are disabled.
7. Optionally, view the difference between the actual and expected duration of the incident in the **Pace** section.





8. Optionally, view details about the status of each step in the **At a Glance** section. The **At a Glance** section updates automatically every 30 seconds. This section lists the type, title, time of creation, and current status for each step in the incident. You can click the link next to an alert or event step to view more details in the BlackBerry AtHoc management system. You can click the link next to a collaborate step to open the collaboration in a new tab on your browser.

### Enable or disable steps

When an incident is live, you can enable or disable specific steps within it. Steps in an incident are enabled by default.

**Note:** You cannot enable or disable Free Text steps.


1. Log in to the BlackBerry AtHoc management system as a Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Incident Manager**.
3. Optionally, from the **All Incidents** list, select **Live Incidents** to filter the list of incidents.
4. Select the incident that you want to enable or disable the steps for.
5. Optionally, click  or  in the step details section.

## View the activity log for an incident

The activity log for an incident displays all actions associated with the incident, including when the incident was started and ended and when steps are enabled, disabled, added, run, or ended. You can [add entries to the activity log](#), [flag entries as important](#), and [export the activity log](#). You cannot edit activity log entries.

1. Log in to the BlackBerry AtHoc management system as a Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Incident Manager**.
3. On the **Incidents** page, click the incident that you want to view the activity log for.
4. On the incident details page, click **Activity Log**. The activity log for the incident opens and displays information about when the incident was created and when each step was added, run, enabled, disabled, or ended, including the date and time.
5. Optionally, for an alert step, click the **Alert ID:***alert-id* link to open the alert details page.

### Flag entries in the activity log as important

1. Log in to the BlackBerry AtHoc management system as a Plan Incident Manager, Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Incident Manager**.
3. On the **Incidents** page, click the incident that you want to view the activity log for.
4. On the incident details page, click **Activity Log**.
5. On the **Activity Log** page, click .

The activity log entry appears with a  above the timestamp in the right column.

### Manually add a log entry

1. Log in to the BlackBerry AtHoc management system as a Plan Incident Manager, Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Incident Manager**.

3. On the **Incidents** page, click the incident that you want to view the activity log for.
4. On the incident details page, click **Activity Log**.
5. On the **Activity Log** page, click **New Entry**.
6. On the **New Activity Log Entry** window, in the **Title** field, enter a title. The maximum number of characters allowed is 100.
7. On the **New Activity Log Entry** window, in the **Body** field, enter a description. The maximum number of characters allowed is 200.
8. Click **Submit**.

The new entry is added to the activity log of the incident.

## Export the activity log


You can export the activity log for an incident to a .csv or .pdf file.

1. Log in to the BlackBerry AtHoc management system as a Plan Incident Manager, Plan Manager, Organization Administrator, or Enterprise Administrator.
2. Click **Plan > Incident Manager**.
3. On the **Incidents** page, click the incident that you want to export the activity log for.
4. On the incident details page, click **Activity Log**.
5. On the **Activity Log** page, click **More Actions > Export to PDF** or **Export to CSV**.

A .csv or .pdf file downloads to your local computer.

## View plan and incident entries in the operator audit trail

The following plan and incident actions are logged in the operator audit trail:

- A plan is added
  - A plan is updated
  - A plan is duplicated
  - A plan is activated
  - A plan is deleted
  - A plan is enabled
  - A plan is disabled
  - A plan is archived
  - A change request is submitted for a plan or plan step
  - A change request is approved
  - A change request is rejected
  - A plan is marked as reviewed
  - A plan is approved
  - The activity log for an incident is exported to a .csv or .pdf file
1. Log in to the BlackBerry AtHoc management system as an Alert Manager, Advanced Alert Manager, Enterprise Administrator, Organization Administrator, or System Administrator.
  2. In the navigation bar, click .
  3. In the **System Setup** section, click **Operator Audit Trail**.
  4. Optionally, do any of the following to filter the audit trail results on the **Operator Audit Trail** page:
    - Select a date range from the **To** and **From** fields.
    - Enter an operator name or ID in the **Operator** field.

- Select **Collaboration**, **Incident**, or **Plan** from the **Entity** list.
- Select the **Search by Specific Action(s)** option and then select actions from the **Action(s)** list.

For more information, see "[View the operator audit trail report](#)" in the *BlackBerry AtHoc System Settings and Configuration*.


# Collaborate

BlackBerry AtHoc Collaborate provides a real-time chat-based collaboration session that can be associated with plans and incidents. Collaborate facilitates cross-organization collaboration through the BlackBerry AtHoc management system and the BlackBerry AtHoc mobile app.

Collaboration managers can create, edit, end, archive, and export archived collaborations. Collaboration managers can participate in multiple collaborations at the same time.

**Note:** Collaborate is not supported in Internet Explorer.



## Enable Collaborate in BlackBerry AtHoc

1. Log in to the BlackBerry AtHoc management system as a System Administrator.
2. Click .
3. In the **System Setup** section, click **Feature Enablement**.
4. On the **Feature Enablement** screen, click the **IsCollaborationSupported** row.
5. On the **Edit Feature Enablement** window, from the **Enabled** list, select **True**.
6. Click **Save**.

BlackBerry AtHoc Collaborate is enabled.

**Note:** You may need to log out of the BlackBerry AtHoc management system and log back in to see the Collaborate tab in the navigation bar.

## Add a collaboration

1. Log in to the BlackBerry AtHoc management system as a Collaboration Manager, Organization Administrator, or Enterprise Administrator.
2. In the navigation bar, click **Collaborate > Collaborate**.
3. On the **Collaboration** screen, click **Add Collaboration**.
4. In the **Collaboration Name** field, enter a name.
5. Click .
6. On the **add users** window, select users and groups to add to the collaboration.  
Any operators or users who have registered for Collaborate from the Collaborate menu on the BlackBerry AtHoc mobile app can be added.
7. Click **Add**.
8. Enter your first message in the **Start typing...** field and press **Enter** or click  to start the collaboration.


The collaboration appears in the left pane of the **Collaboration** window with a live status.

Operators and users who are added to the collaboration and have registered for Collaborate using the BlackBerry AtHoc mobile app receive a notification from BlackBerry AtHoc. Clicking the notification launches the collaboration on the BlackBerry AtHoc mobile app.

## Add participants to a collaboration

You can add up to 50 participants to a live collaboration.

**Before you begin:** You must be a Collaboration Manager, Organization Administrator, or Enterprise Administrator, and must be registered for Collaborate on the BlackBerry AtHoc mobile app to join a collaboration.



1. Log in to the BlackBerry AtHoc management system as a Collaboration Manager, Organization Administrator, or Enterprise Administrator.
2. In the navigation bar, click **Collaborate** > **Collaborate**.
3. On the **Collaboration** screen, select a live collaboration in the left pane.
4. In the right pane, click .
5. On the **add users** window, select users and groups to add to the collaboration.
6. Click **Add**.


The participant is added to the collaboration and can send messages. The participant that you add can view all messages for the collaboration.

**Note:** Once a user is added to a collaboration, if they are later disabled or deleted in the BlackBerry AtHoc management system, they must be manually removed from the collaboration.

## Manage collaboration messages




You can edit, retract, delete, or quote sent messages in a live collaboration.

1. Open the collaboration from the BlackBerry AtHoc management system or the BlackBerry AtHoc mobile app.
2. In the right pane, click  > **Edit** beside the message you want to edit.  
You can also quote, retract, or delete messages.
3. In the **Editing** field, update the message and click .


A  appears beside the edited message.

## Add an attachment





Collaboration participants can add text messages, files, pictures, and videos as attachments to collaboration messages. The maximum file size of an attachment is 10 MB.

1. Open the collaboration from the BlackBerry AtHoc management system or the BlackBerry AtHoc mobile app.
2. In the right pane, click .
3. Browse to the location of the file on your local system and click **Open**.  
The file name and size are displayed above the **Enter a message.** field.
4. Optionally, click  to remove the attachment.
5. Click the **Enter a message.** field and press **Enter** or click  to send the attachment as a message. You can also add text to the message before sending it.

Collaboration participants can view the attachment in the message or click to download it.






**Tip:** Click  > **View attachments** to filter the messages to display only attachments.

## Send a message with high importance

1. Open the collaboration from the BlackBerry AtHoc management system or the BlackBerry AtHoc mobile app.
2. In the right pane, click .
3. Enter your message in the **Enter a message.** field and press **Enter** or click .  
A  appears beside the sent message.
4. Optionally, click  to turn off sending messages with high importance.

## View the delivery status of messages


In a live collaboration, the following icons beside each message you send indicate the status of that message:

- : Sent
- : Delivered to at least one participant
- : Delivered to all participants
- : Read by at least one participant
- : Read by all participants

Click the status icon beside a message to open the **Message Delivery Status** window to see the delivery status for each collaboration participant.

## Remove a participant


You must be a Collaboration Manager, Organization Administrator, or Enterprise Administrator in the collaboration to remove participants from the collaboration.

1. Log in to the BlackBerry AtHoc management system as a Collaboration Manager, Organization Administrator, or Enterprise Administrator.
2. In the navigation bar, click **Collaborate** > **Collaborate**.
3. On the **Collaboration** page, click a collaboration in the left pane to open it in the right pane.
4. Click **participants**.
5. Beside the name of the participant that you want to remove, click  > **Remove Collaboration Participant**.

The participant is removed from the collaboration.

## End a collaboration

You can end any collaboration that you are an owner or administrator for.



1. Log in to the BlackBerry AtHoc management system as a Collaboration Manager, Organization Administrator, or Enterprise Administrator.
2. In the navigation bar, click **Collaborate** > **Collaborate**.
3. On the **Collaboration** page, click a collaboration in the left pane to open it in the right pane.
4. Click  > **End Collaboration**.

The collaboration ends and becomes read-only and no additional messages can be sent. The collaboration is archived automatically. The archived collaboration is no longer visible in the Collaboration Manager. To view an archived collaboration, see [View archived collaborations](#).

## View collaborations in the Collaboration Manager


All live collaborations appear in the Collaboration Manager in the left pane. Collaborations that have unread messages appear in bold. Collaborations that have been ended are archived and do not appear in the Collaboration Manager.

To view an archived collaboration, see [View archived collaborations](#).

1. Log in to the BlackBerry AtHoc management system as a Collaboration Manager, Organization Administrator, or Enterprise Administrator.
2. In the navigation bar, click **Collaborate > Collaborate**.
3. On the **Collaboration** page, click a collaboration in the left pane to open it in the right pane.
4. Optionally, in a collaboration, click **participants** to view details about the collaboration participants.  
A  beside a participant name indicates that the participant is a Collaboration Manager and is the administrator for the current collaboration. A  beside a participant name indicates that the participant is a Collaboration Manager, but is not the administrator for the current collaboration.

## View archived collaborations

When a Collaboration Manager ends a collaboration, it is automatically archived.


1. Log in to the BlackBerry AtHoc management system as a Collaboration Manager, Organization Administrator, or Enterprise Administrator.
2. In the navigation bar, click **Collaborate > Ended**.
3. On the **Ended Collaborations** page, click a collaboration in the left pane to open its details, including all messages, in the right pane.
4. Optionally, click  > **Download attachment** to download a *<collaboration-name>.zip* file that contains the attachments sent during the collaboration.

## View collaboration entries in the operator audit trail

The following Collaboration Manager activities are added to the operator audit trail:

- Create a collaboration
- End a collaboration
- Add a participant
- Remove a participant
- Promote a collaboration participant

**Note:** The operator audit trail retains data for 6 months.

1. Log in to the BlackBerry AtHoc management system as Collaboration Manager.
2. In the navigation bar, click .
3. In the **System Setup** section, click **Operator Audit Trail**.

4. Optionally, on the **Operator Audit Trail** page, do any of the following to filter the results:

- Select a date range from the **To** and **From** fields.
- Enter an operator name or ID in the **Operator** field.
- Select **Collaboration** from the **Entity** list.
- Select the **Search by Specific Action(s)** option and then select actions from the **Action(s)** list.

**After you finish:** For more information, see "[View the operator audit trail](#)" in the *BlackBerry AtHoc System Settings and Configuration* guide.



# BlackBerry AtHoc Customer Support 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 Support Portal:

<https://www.blackberry.com/us/en/support/enterpriseapps/athoc>

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

# Documentation feedback

The BlackBerry AtHoc documentation team strives to provide accurate, useful, and up-to-date technical documentation. If you have any feedback or comments about BlackBerry AtHoc documentation, email [athocdocfeedback@blackberry.com](mailto:athocdocfeedback@blackberry.com). Please include the name and version number of the document in your email.

To view additional BlackBerry AtHoc documentation, visit <https://docs.blackberry.com/en/id-comm-collab/blackberry-athoc>. To view the BlackBerry AtHoc Quick Action Guides, see <https://docs.blackberry.com/en/id-comm-collab/blackberry-athoc/Quick-action-guides/latest>.

For more information about BlackBerry AtHoc products or if you need answers to questions about your BlackBerry AtHoc system, visit the Customer Support Portal at <https://www.blackberry.com/us/en/support/enterpriseapps/athoc>.

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