



Setting up teamSOS Lockdown

A clean, lockdown-ready configuration, checked and tested

This guide covers a clean, lockdown-ready install of teamSOS: the basic checks, the setup steps, and how to test that everything works. **Follow it in order, and you will have a lockdown you can rely on before you need it.**

Lockdown editions: In a teamSOS Lockdown subscription, you have **one designated response team** and **one Incident Type** — Call for Help. teamSOS Enterprise supports multiple response teams, multiple incident types and custom escalation pathways.

Getting Started with teamSOS Admin

Complete these steps to set up and configure your teamSOS instance

- 1 Add Team Members**
Invite your team members and set up their roles and permissions. [Manage Users](#)
- 2 Set Up Response Teams**
Create response teams and assign members to handle incidents. [Set Up Teams](#)
- 3 Create Managed Groups**
Organise your staff into groups for better internal communication. [Create Groups](#)
- 4 Set Up Incident Types**
Create and configure incident types for different scenarios your team handles. [Configure Incidents](#)
- 5 Set Up Templates**
Setup templates for announcements, locations, quick messages and more. [Setup Templates](#)

The setup wizard in the Admin Portal — click any step to go straight to that page

STEP 1 · Add your team members

You must add users before the system can be used. There are three ways to do it.

1

Add users manually

Go to **User Management** and click **Invite New User**. Enter each user's first name, surname and email, click **+Add** for more people, then **Add Users** to finish.

2

Import users via CSV

Go to **User Management > Import Users**, click **+Upload**, download the CSV template, fill it in with names, emails and roles, then upload and click **Import**.

3

Sync from Active Directory (Entra)

If your organisation uses Microsoft Entra, synchronise users automatically from your directory so teamSOS stays in step with your staff list. You can also enable Single Sign-On. Set this up from **Admin > User Management > Manage Users**, and see **How to Guide: Integrating teamSOS with Active Directory** for the full walkthrough.

Invites: Enable **Email Invites** to send access immediately, or trigger them later from **Manage Users > Email Invites**. Importing and syncing do not send invites automatically.

User roles

Role	What it allows
User	Respond to incidents, raise new incidents, take part in chats, have tasks assigned, and receive announcement alerts.
Admin	Full access — create, edit and manage users, configuration and incidents, configure other users' permissions, and make announcements.
Announce	Make announcements without full admin access.

Lockdown depends on this: The **Announce** permission is required for lockdown functionality. Make sure everyone who might need to put the site into lockdown has either the Announce or the Admin role — and that this survives staff changes.

STEP 2 · Set up your Response Team

Response Teams are the groups of staff assigned to respond to an incident. On a Lockdown subscription, you have a single designated response team — typically SLT.

- Go to **Response Teams**.

- Click **Create**, name the team, and click **Save**.
- Click **Edit**, select the users to include, then **Save**.

Check the cover: Make sure the team is large enough that someone is always on site and available — including during breaks, trips and INSET days.

STEP 3 · Create Managed Groups

Managed Groups organise users into membership groups for targeted announcements — for example "Incident Management Team". They let you send the right message to the right people quickly, and they are also what you use to target Desktop Alerts at specific groups.

- Go to **Managed Groups** and click **Create**.
- Add a name and an optional icon.
- Select the users and click **Save**.

STEP 4 · Set up your Incident Type

Incident Types are the categories staff choose when they need help. On a Lockdown version of teamSOS you will have one Incident Type, allowing staff to Call for Help.

← New - Call for help

Call for help [Shriya Johari]

Enter required incident notes

Intruder on-site Serious incident Threat near site Fire/smoke

Cancel Start incident

The Call for Help screen on a Lockdown subscription

How to create the Incident Type

- Go to **Admin > Incident Types** and click **Create**.
- Enter a name and, optionally, an icon.
- Configure the Configuration below.

Visibility and display

- **Hidden** — hide the type while you configure it.
- **Display Order** — controls how prominently it appears. Keep Lockdown at the top.

Assign to a team

- **Response Team** — who is notified when this type is raised.
- **Group Type** — organises types into categories for easier filtering.

Alerts and escalation

- **Longer Alert Sound** — makes the alert more noticeable.
- **Show First Responder in Timeline** — displays who responded first.
- **First Arrival is First Responder** — automatically assigns the first viewer.
- **Assign Only One Responder** — prevents several people picking up the same incident.
- **SOS Team if Unresponded** — escalates to a backup team if nobody responds in time.
- **Repeat Alert** — how often the alert repeats, in 30-second intervals.
- **Stop Repeating After** — a time limit for repeated alerts.
- **Start Hunting After** — when escalation to another team begins.

Hunt Group Routing (escalation)

- Click **Show Custom Routing**.
- Tick **Custom Hunt Path**.
- Add teams in the order they should be notified, then **Save**.

Task Lists (optional)

Task Lists give step-by-step guidance during an incident — your lockdown procedure, for example. Once attached to an Incident Type, the list appears automatically whenever that type is raised. Go to the relevant Incident Type > Edit > Task List and add the steps in order.

Naming change: Task Lists were previously called **Playbooks**. Older training material may still use the old name.

STEP 5 · Set up Templates

Templates matter more in a lockdown than anywhere else. When something is happening, nobody should be composing a message from scratch. Prepare the wording now.

Heads up: The template creation interface was redesigned in May 2026. The options are the same, but the layout on screen will look different from older screenshots.

Announcement Templates

Go to **Admin > Configuration > Templates > Announcement Templates**.

Setting	What it does
Title & Description	Required. The heading and body staff will see.
Type	Confirm you're OK (requires a response) or To be acknowledged (read receipt).
Urgent	Raises the priority of the announcement.
Silent	Sends without an audible alert on staff devices. Set it as the default here so it is always on for this template.
Desktop Alert	Takes over staff screens. Can be targeted at specific groups.
Default Group	Who receives the announcement.
Visibility	Show or hide the template from users.
Behaviour	Replace or append the template text when used.

Templates worth building before you go live

- **Intruder Lockdown** — Confirm you're OK, Urgent, Desktop Alert on
- **Fire Lockdown / Evacuation** — Confirm you're OK, Urgent, Desktop Alert on
- **All clear** — To be acknowledged, Desktop Alert on
- **Silent** update to SLT only — Silent on, targeted at your Incident Management Team

Other template types

- **Incident Responses** — predefined notes linked to an incident type, with an optional [Student] tag that prompts for a name. Admin > Configuration > Templates > Incident Responses.
- **Quick Messages** — short in-incident replies such as "On my way" or "Need backup". Admin > Configuration > Templates > Quick Messages.
- **Locations** — named areas of your site with a unique code, and optionally a What3Words address, radius, elevation and coordinates. Admin > Configuration > Templates > Locations.

STEP 6 · Test it

Use Drill Mode to simulate an incident with a small group before going live. It mirrors a real Call for Help flow from alert through to response, and auto-deletes after one hour.

1**Run a drill**

Open the menu and tap **Start a Drill**, select users, then click **Start Drill**.

2**Test an announcement**

Within the drill, tap **+ > Make an Announcement**. Use a template or write a custom alert, and label it clearly with "TEST" so staff know it is a simulation.

3**Check the Desktop Alert lands**

Confirm the alert takes over the screen on a test device, and that the response buttons work. If it does not appear, see **How to Guide: Installing teamSOS Desktop Alerts**.

FINALLY · Technical setup checklist

Check	Where to find the detail
Firewall and filtering	How to Guide: Firewall and Filtering Setup
Onboarding Wizard	How to Guide: Onboarding Wizard – guide you through the onboarding process.
Install teamSOS	How to Guide: Installing teamSOS – MSI with Group Policy, or Intune
Desktop Alerts	How to Guide: Installing teamSOS Desktop Alerts
Active Directory sync	How to Guide: Integrating teamSOS with Active Directory
iOS Critical Alerts	How to Guide: Setting up Critical Alerts for iOS – so alerts break through silent and Do Not Disturb

Where to find these: Log in to the teamSOS web app, open **Help & Support** in the left-hand menu and choose **FAQs**. You can also find them on the **Onboarding space** that was shared in the welcome email.

Need help?

If you encounter any issues, please contact help@teamsos.co.uk