BoldNetNEO Functional Overview

Contents

About This Guide

This guide is a functional overview and is intended to provide conceptual and summary operational information. Not all fields within the application are defined in this guide, some fields are defined within the application while other fields are familiar terms to those in the security industry.

BoldNetNEO Overview

BoldNetNEO is Bold Technologies' newest web access system with a completely new HTML5 interface that works with any mobile device. The most important feature is that BoldNetNEO is fast. Silverlight has been removed and you will experience a notable increase in BoldNetNEO's speed in comparison to the Silverlight client. BoldNetNEO also offers a better visual design that's more intuitive with a comprehensive layout that makes data easier to find and update. Finally, another notable addition to BoldNetNEO is the Customer Wizard which walks you through the steps necessary to create a new Customer.

Other new features of BoldNetNEO include:

- Inline searching on Contacts, Programming, Activity, and so on
- Inline editing for Schedules
- Help text included with options
- Easy access to On-Test and Customer status

Know Issues

Issue:

When viewing BoldNetNEO on a Google Chrome 32-bit system, the display is twenty percent larger than it should be. The workaround is to press Ctrl+Minus Sign on your keyboard to reduce the size of the image displayed.

BoldNetNEO User Group Options

BoldNetNEO has different options for different types of user groups. Users can log on as a Monitoring Company, Dealer and Branch, or Customer. The functionality for the Dealer and Branch user groups is the same and therefore documented in the same section. Because of the difference in options per user group, this document is organized into three sections based on those users as follows: Monitoring Companies, Dealers and Branches, and Customers.

BoldNetNEO Login Creation

There are two types of logins that need to be established in the Manitou Supervisor Workstation for BoldNetNEO users, they are Internal and External.

- **Internal Login** – This password is used to identify yourself over the telephone, but is not the password you use to log into the website.
- **External Login** – This password is used to log into BoldNetNEO. This password should be different from the password for the Internal login.

Additionally, BoldNetNEO logins can exist at several different levels. If the BoldNetNEO login is created at the Monitoring Company level, the login will have unrestricted access to the entire Customer base and statistics. If the BoldNetNEO login is created at the Dealer level, the login will only have access to accounts belonging to that Dealer or to its Subdealers. If the BoldNetNEO login is created at the Customer level, the login will have access to only that customer.

Please refer to the ***BoldNet Login Creation Guide*** located at the Bold Support Portal.

Note: You must have access to the Bold Support Portal to view the document. If you do not have the necessary access, please contact Bold Support.

Permissions

As described in the previous section, BoldNetNEO functions differently depending on your user group permission. BoldNetNEO functionality can also be limited depending on user Permissions settings in the Manitou Supervisor Workstation. For more information on Manitou Neo and BoldNetNEO Permissions settings, please refer to the ***Manitou and BoldNet Permissions Guide*** located at the Bold Support Portal.

Note: You must have access to the Bold Support Portal to view the document. If you do not have the necessary access, please contact Bold Support.

Logging On to BoldNetNEO

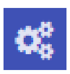
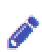
At the BoldNetNEO Sign In page, enter your user ID and password to log on.

Important: If while using BoldNetNEO you encounter any “Permissions Denied” errors, you should ensure that Permissions are set up correctly in the Manitou Supervisor Workstation.

Standard Icons

The following are standard options throughout BoldNetNEO.

Important: Some options are only visible once you place your pointing device on a particular form or near a particular field.

Icon	Description
	Click to close the current Customer or form you're on.
	Click to clear any edits you've made.
	Click to save any changes you've made.
	Click to perform a search.
	Click to change your settings.
	Click to log off.
	Click to collapse or expand details.
	Click to add information on a particular form.
	Click to delete information on a particular form.
	Click to edit information on a particular form.
	Anywhere you see the Handshake icon it indicates that you can copy data from a tab-delimited text file and paste the data into a related grid within Manitou Neo. Clicking the icon provides details on the allowable copy/paste parameters.
	Click to see the latest updates on a particular form.
 	Click to place a Customer on a Watch List.
	Click to filter Activity Logs, Maintenance Issues, and so on.

Icon	Description
	As you advance in completing a process, for example, the Customer Wizard or Report generation, you can click sections of the progress bar to move backward/forward in your steps.
	Click to perform a lookup for a given field.
	Indicates a Dealer or Branch.
	Indicates a Monitoring Company.
	Indicates a Customer, and in some instances, you can click for advanced options.

Monitoring Company Accounts

Dashboard

Once you log on to BoldNetNEO as a Monitoring Company, the Dashboard is the first window to appear. The following options are available from the Dashboard:

Recent Customers

This is a selectable list of the most recent Customer accounts you've viewed or worked on. If you select a Customer, you go to the Details section where you can manage Address, Contact, Activity Log, On Test, Status, and System information.

Customer Watch List

A watch list is a group of accounts that is meant to be easily accessible, for example, if a high profile Customer needs to be monitored. If Customers are marked for "watch" they will appear in this list on the Dashboard. If you select a Customer, you can manage Address, Contact, Activity Log, On Test, Status, and System information.

Statistics

You can view and select Customer Counts, Customer Status Summary, and Customer TX Summary information from where you can navigate through more detailed information Statistics for a selected Customer.

- **Customer Counts** – Lists the total number of Active, Inactive, Pending, and Deactivated Customers (includes a related pie chart).
- **Customer Status Summary** – Lists the number of Customers in various conditions within alarm monitoring, maintenance, permits, and so on.
- **Customer TX Summary** – Lists the number of Transmitters in various conditions.

Note: You can filter the statistics by selecting All Customers, Customers with No Dealer, and Customers with No Branch from the related drop-down list:

Customer Wizard

See Customer Wizard, page 14 for details on using the Customer Wizard option.

Monitoring Company Options

The following subsections contain the available options.

Note: As stated earlier in this guide, options can vary based on Permissions and user groups settings in the Manitou Supervisor Workstation (Monitoring Companies, Dealers and Branches, and Customers).

Branding

With Branding you can:

- Change the color scheme of BoldNetNEO for Dealers or Customers simply by clicking a color.
- Upload your own logo by clicking Upload.
- Set the option as to whether or not Dealers or Customers can personalize their theme.
- Select those Dealers who you want to allow Branding.

Contact List

See Contact List, page 20 for details on using the Contact List option.

General Schedules

The General Schedules define the availability of Keyholders, Programming, Access Control, Call List Availability, and Reminder schedules, and when you can put accounts On Test.

Note: You can add, edit, and delete General Schedules by clicking the related icon.

Call Lists

Call Lists contain the details of all the people requiring contact for a given alarm type. Rotation lists are often in place to ensure that one Keyholder is not the only Keyholder contacted each time there is an alarm. Call Lists are lists of Contacts, grouped and ordered based on alarm-types and priority.

Notes: You can add, edit, and delete Call Lists by clicking the related icon.

Comments

Comments contain Temporary, Standing, or Special instructions for a Customer. Comments also offers you access to view expired comments about a Customer.

- **Temporary** – Only active for a specified amount of time.
- **Standing** – Active until deleted.
- **Special** – Particular instructions or scenarios that apply to the Customer record and are active until deleted.

Note: You can add, edit, and delete Comments by clicking the related icon.

Maintenance Issues

With the Maintenance Issues form you can create maintenance/repair items relating to the Customer record.

When adding a Maintenance Item, the Priority slider defaults to Not Assigned. The highest priority is "1" and the lowest priority is "10."

Note: You can add, edit, refresh, filter, and delete Maintenance Issues by clicking the related icon.

Tech Maintenance

The Technician Maintenance Issues form is where you can view, filter, and edit information and technicians assigned to various maintenance issues.

Reports

See Reports, page 22 for details on using the Reports option.

Statistics

You can view and select Customer Counts, Customer Status Summary, and Customer TX Summary information from where you can navigate through more detailed information Statistics for a selected Customer.

- **Customer Counts** – Lists the total number of Active, Inactive, Pending, and Deactivated Customers (includes a related pie chart).
- **Customer Status Summary** – Lists the number of Customers in various conditions within alarm monitoring, maintenance, permits, and so on.
- **Customer TX Summary** – Lists the number of Transmitters in various conditions.

Note: You can filter the statistics by selecting All Customers, Customers with No Dealer, and Customers with No Branch from the related drop-down list: 

Logon Messages

At the Monitoring Company level, you can add and edit a logon message for users to see.

To add or edit a logon message in BoldNetNEO, do the following:

1. Log on to BoldNetNEO.
2. Select the Monitoring Company from the **Home** section of BoldNetNEO.
3. Click the **Logon Message** option for the Monitoring Company. The **Logon Message** form appears.
4. Click **Edit** on the form.
5. Add or edit the message that you want to appear at logon and then click **Done** to save the message.

Settings

When you click Settings, you have the following options:

- You can select a default setting for descriptions of options. If you select Beginner, all descriptions display by default. If you select Advanced, all descriptions are collapsed (hidden) by default, but can be expanded. The Collapsed view is indicated by and the Expanded view is indicated by .
- You can change the System color theme simply by clicking a color.
- You can view the version of BoldNetNEO you are using.

Customer Account Options (Monitoring Companies)

For the actions you can take on Customer accounts as a Monitoring Company, see Customer Accounts, page 37, and the related subsections.

Note: As a Monitoring Company, you have greater control over Customer accounts than do Customers.

Dealer and Branch Accounts

Dashboard

Once you log on to BoldNetNEO as a Dealer or Branch, the Dashboard is the first window to appear. The following options are available from the Dashboard:

Recent Customers

This is a selectable list of the most recent Customer accounts you've viewed or worked on. If you select a Customer, you go to the Details section where can manage Address, Contact, Activity Log, On Test, Status, and System information.

Customer Watch List

A watch list is a group of accounts that is meant to be easily accessible, for example, if a high profile Customer needs to be monitored. If Customers are marked for "watch" they will appear in this list on the Dashboard. If you select a Customer, you can manage Address, Contact, Activity Log, On Test, Status, and System information.

Statistics

You can view and select Customer Counts, Customer Status Summary, and Customer TX Summary information from where you can navigate through more detailed information Statistics for a selected Customer.

- **Customer Counts** – Lists the total number of Active, Inactive, Pending, and Deactivated Customers (includes a related pie chart).
- **Customer Status Summary** – Lists the number of Customers in various conditions within alarm monitoring, maintenance, permits, and so on.
- **Customer TX Summary** – Lists the number of Transmitters in various conditions.

Note: To include Subdealers in Statistics, select the Include Subdealers check box.

Customer Wizard

When selected, the Customer Wizard appears. The wizard takes you through the following for the Customer you're creating:

Initial Setup

This is where you enter opening Contract ID, Country, Time Zone, Language, and Monitoring Status for the Customer.

Note: If you leave the Contract ID blank, one will be automatically generated for you.

Name & Address

This window is used to enter the Customer Type, Name, and Address information. You can also edit information that you entered on the Initial Setup form.

Note: When you enter a Name, the Search By field automatically populates with the same information.

Contact Points

This window is used to enter additional Contact information for the Customer such as Contact Type, Phone Number, Extension, Script (defined call communication), Schedule, Email Address, and Web address.

Note: At this step in the process of adding a Customer, you can add a General Schedule by clicking New Schedule in the Schedule section. General Schedules define the availability of Keyholders, Programming, Access Control, Call List Availability, Reminder Schedules, and when you can put an account On Test.

Monitoring Details

This window is used to enter Codes, Fills, General Monitoring Options, and Passwords, to include a "Duress" Password.

Codes

- **Group Code** – Categorizes businesses that have multiple branches.
- **Class Code** – User-created options for grouping certain Signals or Resolutions together. For example, a Central Station might want to assign all monitored banking companies to a large Class Code, but a particular Branch of banks to one Group Code.
- **Monitoring Group** – Designations to categorize and distribute signals to specific Operator groups. At the time Manitou Neo is installed, it has a default Monitoring Group setting of 0.

Fills

- **Area Fill** – Automatically add any Areas not already programmed to the account data.
- **Zone Fill** – Automatically add any Zones not already programmed to the account data.

Systems

This window is used to set the configuration of how a signal will find this account when it arrives from a Receiver. The Systems window covers four different types of Systems: Event Monitoring, Access Control, GPS, and Other (user-defined).

- **Event Monitoring** – This System is for checking the type of alarm being presented.
- **Access Control** – This System is for recording the in/out access by people for a given property.
- **GPS Tracker** – This System provides location information about assets for tracking, locating, and other directional-based services.
- **Other** – This System is a catchall to give Monitoring Companies a way to include other types of Systems that don't fall into Event Monitoring, Access Control, or GPS categories. By creating an "Other" System, you can tie it to a Monitoring Service which the central station can automate billing for through accounting integration.
- **Monitoring Type** – The kind of monitoring you want to set for the customer. In most cases, this will be Alarms Only. Alarms Only means you are monitoring the alarm events and bringing them to your attention. On a new System, Alarms Only and Log Only are the two options available. Additional Monitoring Type options can be added for accounting purposes. For more information on Monitoring Types, speak with an on-site Supervisor or Manager for the facility.
- **Panel Type** – The manufacturer and model number for a control panel.

Adding a Transmitter

A Transmitter is how a signal finds a Customer account.

- **TX Type** – This allows for the designation of a specific set of Transmitter Types being used. This is useful when dealing with a large entity using numerous types of transmitters.
- **Receiver Line Prefix** – This is the prefix for the device that received the alarm signal. Receiver Line Prefixes provide Manitou Neo with information about the origin of received signals and the Customer accounts associated with them. Also, adding Receiver Line Prefixes increases the number of incoming signals that can be handled by a single Receiver.
- **TX ID** – This is used to specify a particular range of Transmitter IDs that has been given to you. Blocks of Transmitter IDs can be assigned to different Dealers/Branches using the same Receiver Line Prefix.

Transmitter Ranges

- Customers must have Transmitter Ranges as the Monitoring Company and Dealer levels.
- Transmitter Ranges are required to prevent duplication of Transmitter IDs.
- Transmitter Ranges determine which Transmitter IDs are allocated to a Dealer for use with the Dealer's accounts. When adding new Customer accounts to the System, consider that the Customer's Transmitter ID should be within the Transmitter Range of its associated Dealer. The purpose of assigning a range of Transmitters to Dealer records is that more information about incoming signals is immediately available. When a signal is received with a TXID (Transmitter Identification) within a particular Dealer's range, it is clear that the signal is from one of that Dealer's accounts. This gives more information when handling alarms.

- **TX Protocol Type** – The communications properties normally used by the Transmitter device.
- **Caller ID** – The Caller Identification phone number.
- **Remote Address** – The IP address for the Transmitter.

Adding Areas and Zones

Areas and Zones are places inside the residence or site where monitoring may be established and used to direct Customers or Authorities to specific areas where alarms are sending a signal. Zones are a smaller unit, and several Zones can fit inside one Area.

- **Area** – An alphanumeric code of your choosing associated with the Area.
- **Zone** – An alphanumeric code of your choosing associated with the Zone.
- **Description** – A brief explanation of an Area or Zone.
- **Schedule** – You can select All Access, No Schedule, or New Schedule. All Access allows a System to send opening and closing signals for the sole purpose of logging the signals. By attaching an All Access Schedule to an Area, it will now force a Monitoring Service which will trigger additional billing for the Opening/Closing activity. This eliminates the Central Station from having to enter a dummy "All Access" Schedule on each Customer record whenever they needed to allow an Open/Close service without an attached Area, such as residential Systems that send opening and closing signals so that the Central Station will know if the System is armed or not. If you select New Schedule, please see the following section for more information.
- **Expected Signals** – You can set the numerical signal you expect to receive from the Zone.

Open/Close Schedules

When adding an Area to a Transmitter, you can add Open/Close Schedules. The Open/Close Schedules option consists of the following forms:

- **O/C Schedules** – You can add an O/C Schedule and edit an existing one by double-clicking it.
- **<O/C Schedule Name>** – Displays a list of O/C Schedules from which you can select and edit. This form contains the following four selectable tabs:
    - **Permanent** – The normal, regular Schedule.
    - **Alternate** – A temporary Schedule for a period greater than 24 hours.
    - **Holidays** – A specific date that takes precedence over a Permanent and Alternate Schedule.
    - **Temporary** – A single-day Schedule override.
- **Overall** – This form displays a “quick view” summary of the Schedule for the current week.

Notes:

- A normal Open/Close Schedule must have been configured for you prior to setting up a Temporary Schedule.
- Schedule hierarchy works from left to right per the tabs as follows: The Permanent Schedule details the normal situation, the Alternate schedule (if there is one) replaces the Permanent Schedule, the Holiday Schedule (if there is one) replaces the Alternate and Permanent Schedule, and Temporary Schedule (if there is one) replaces everything else.

Open/Close Schedules Wizard

When you Add an Open/Close Schedule, you have the option to click Use Wizard for Permanent and Alternate Schedules.

Window Codes

Window Codes can be set up and are used to add a specific amount of time to allow a Schedule more flexibility. For example, a Customer might want to allow a five minute "buffer" to the Schedule to allow for an early open or a late close. Thus, the Window Code would allow an open to occur anywhere between 7:55 A.M. and 8:05 A.M.

Note: Window Codes can be used without the Schedule Wizard.

Programming

Programming is required for every System to ensure proper account processing. The Programming items define and decode the information coming in from the Transmitters through the Receivers. For example, some Transmitters send a generic message that an alarm sounded in a specific Area or Zone. The Receiver then passes this message to the application. However, the System doesn't know what that activation on that Area or Zone means without the Programming. The Programming is there to translate the activation on that Zone to a burglary, fire, or other alarm on that Zone. Also, Programming will allow for the definition of specific actions to complete on the alarm, such as call the Police and then the Keyholder on the account.

The **Input section** communicates to Manitou Neo which type of signals should be associated with this Programming entry. The information here should be entered very carefully and will vary from account to account.

- **Event** – Manitou Neo Event Code associated with the alarm. You can type a valid code or select from the drop-down list.
- **Sensor** – The Control Sensor for the alarm. You can type in a Sensor or use an asterisk (*) to designate "Any."

The **Output section** communicates to Manitou Neo what the incoming (Input) signal information means. This is mainly used for non-intelligent signal formats.

- **Event** – Manitou Neo Event Code associated with alarm. You can type a valid code or select from the drop-down list.
- **Description** – The Description will auto-fill based on the Event Code selected; however, it can be overwritten.
- **Sensor** – The Control Sensor for the alarm. You can type in a Sensor or use an asterisk (*) to designate "Any."
- **Point ID** – A description defining alarm location or detail.

Special Processing commands are not used in BoldNetNEO but are used in Manitou Neo. Please see the *Manitou Neo Functional Overview* for details.

Contacts

This window is used to enter the Contacts information. Additionally, you can select Related Entities, such as Police, Fire, and Medical, and the related PSAP (public safety answering point information).

Notes:

- **General Schedules:** As with the earlier Contact Points step in the Customer Wizard, you have the option at this point to add a General Schedule in the process of adding a Customer. You click Advanced Edit , and once you're at the Contact Points step, you click Add in the Phone Number section and then select New Schedule in the Schedule section. General Schedules define the availability of Keyholders, Programming, Access Control, Call List Availability, and Reminder Schedules, and when you can put accounts On Test.
- **Templates:** You have the option at this point to add a Template to the Customer account. Templates allow you to apply previously entered Contact information and settings to the new account. You click Advanced Edit , then at the Profile step, you can add a Template by clicking Template in the Web Profile section.

Call Lists

This window is used to add details for all the People, Agencies, Authorities, Dealers and/or Branches requiring contact for a given alarm. Call Lists are especially useful for commercial sites that might have differing shifts based on the time of day.

Dealer and Branch Options

The following subsections contain the available options.

Note: As stated earlier in this guide, options can vary based on Permissions and user groups settings in the Manitou Supervisor Workstation (Monitoring Companies, Dealers and Branches, and Customers).

Details

With this option you can add and edit your Dealer Address and Contact information. The Contact information you provide can be seen by the Monitoring Company, but not Customers.

Notes:

- Script Messages and General Schedules can be added when creating your Contact information.
- Adding a General Schedule is similar to that when adding a General Schedule for a Customer through the Customer Wizard.
- If you create a default Script Message, the selected event types are used to automatically fill event details for the Script Message based on the selected parameters. Default Script Messages are used with emails, faxes, and text notifications.

Contact List

From these forms you can add and edit detailed information about Contacts, Customers, Dealers, Branches, Agencies, Authorities, and Keyholders that relate to a particular Customer account.

The Contact List contains all the persons and entities that have access to a property. Not everyone may be contacted in the event of an alarm. However, if a person has any sort of access to the property, the person must be listed in the Contact List. Having everyone with access listed allows for tracking as well as contact should a particular individual set off an alarm.

Contacts Form

- You can add a Contact by clicking the Add icon ✚ . When adding a Contact, you can use the Advanced Edit mode , which takes you through the Initial Setup, Profile, Contact Points, and Name & Address forms, similar to the Customer Wizard.
- You can double-click the current Contact from the list to edit the Contact's information. Again, you are taken through the Add/Edit process, similar to Customer Wizard, where you edit Profile, Contact Points, and Name & Address information.

Notes:

- Script Messages and General Schedules can be created through the forms as well.
- You can select Suppress at the Name & Address form if the Contact should be prevented from displaying on the Call List form. The default is the Suppress check box being selected when the Contact has no Contact Points.

Contact Points Form

The Contact Points form lists all the different Contact point types available within the System. These include telephone numbers, emails addresses, pager and fax numbers, and web addresses.

You can add and edit Contact Points by clicking the Edit icon . When adding a Contact Point, you are taken through the Profile, Contact Points, and Name & Address forms, similar to the Customer Wizard

Notes:

- Script Messages and General Schedules can be created through the forms as well.
- You can select Suppress at the Name & Address form if the Contact should be prevented from displaying on the Call List form. The default is the Suppress check box being selected when the Contact has no Contact Points.

General Schedules

The General Schedules define the availability of Keyholders, Programming, Access Control, Call List Availability, and Reminder schedules, and when you can put accounts On Test.

Note: You can add, edit, and delete General Schedules by clicking the related icon.

Call Lists

Call Lists contain the details of all the people requiring contact for a given alarm type. Rotation lists are often in place to ensure that one Keyholder is not the only Keyholder contacted each time there is an alarm. Call Lists are lists of Contacts, grouped and ordered based on alarm-types and priority.

Notes: You can add, edit, and delete Call Lists by clicking the related icon.

Comments

Comments contain Temporary, Standing, or Special instructions for a Customer. Comments also offers you access to view expired comments about a Customer.

- **Temporary** – Only active for a specified amount of time.
- **Standing** – Active until deleted.
- **Special** – Particular instructions or scenarios that apply to the Customer record and are active until deleted.

Note: You can add, edit, and delete Comments by clicking the related icon.

Maintenance Issues

With the Maintenance Issues form you can create maintenance/repair items relating to the Customer record.

When adding a Maintenance Item, the Priority slider defaults to Not Assigned. The highest priority is “1” and the lowest priority is “10.”

Note: You can add, edit, refresh, filter, and delete Maintenance Issues by clicking the related icon.

Tech Maintenance

The Technician Maintenance Issues form is where you can view, filter, and edit information and technicians assigned to various maintenance issues.

Reports

Reports has two types of report formats available: System Reports and Scheduled Reports. System Reports are individual reports you must create each time you want one to generate. Scheduled Reports are created once and then generated according to your designated interval.

Notes:

- You can display, download, publish, re-queue (Scheduled Reports only), delete, and email all reports by clicking the available option.
- You must have Bold Support Portal access to view linked documents. If you do not yet have the necessary access, contact Bold Support.
- In regard to selecting report options, checking all categories is the same as unchecking all categories. In order to keep the parameter list as short as possible, when you select all items of a particular category, the parameter sent to the report server is empty (meaning "all" is requested).
- Reports that group by dealers (including sub-dealers) are not broken out by sub-dealers. Instead, they are consolidated, and their information is displayed below the main dealer.
- If your browser blocks a report, a dialog box displays indicating so, and you have the option to unblock the report per the standard operation in your browser.

System Report

Activity

- **Agency Response**

  The Agency Response Report provides details regarding the question the Agency representative should answer for identity verification and the expected answer from the Agency representative for the verification question. You can filter this report by a number of options to include Event Codes, Event Categories, Monitoring Status, and Advanced.

- **Alarm Cause Summary**

  The Alarm Cause Summary Report provides details regarding a summary of what caused alarms, that is, Burglary or False Alarm during a set time period. The report ultimately provides a listing of the Event Category, Alarm Causes (Resolution Codes) and the number of genuine and False Alarms.

  You can enter various search criteria into the fields provided on the **Alarm Cause Summary** card.

- **Alarm Detail**

  The Alarm Detail Report contains the alarm activity details for a single or for several Customer records. When you run the report with the defaults, the report is grouped by Customer and lists each alarm in sequential order.

  Note: The Alarm Detail Report satisfies all requirements of UL 1981, the automation system shall be able to output the information contained in sections 10.1.3 – 10.1.6 by account specific reports.

- **Alarm Detail by Alarm Number**

  The Alarm Detail by Alarm Number Report is a more specific version of the Alarm Detail Report required by UL. You must know the alarm number to run this report correctly.

- **Alarm Grading**

  The Alarm Grading Report rates various types of signals into categories and lists how many were in and out of compliance upon you viewing them within a specified time period for that type.

- **Alarm Resolution**

  The Alarm Resolution Report produces the details and summary information about alarms and how they were resolved, including if the alarm was dispatched or not. The report results also total the number of genuine and False Alarms and the percentages of each including the numbers and percentages of dispatched False Alarms.

- **Alarm Response**

  The Alarm Response Report produces activity and shows how long it took for the alarm to receive its first contact action.

  Note: The Contact Action requires an operator to pick up the telephone and dial out to an actual Contact. If a pager, fax, or email is used to contact a responsible party, that is not considered a true Contact Action.

- **Customer Activity**

  The Customer Activity Report is the most detailed report available for obtaining Customer account activity information. The Customer Activity Report includes information on most Customer activities including Opening, Closing, Out of Service, and Comments. It excludes instances where someone accessed the Customer record only for viewing or editing. The Customer Activity Report displays results by Contract Number and then by the Alarm Report Number.

This report differs from the Alarm Detail Report, which concentrates only on alarm activity. The Customer Activity Report collects and returns information on the entire activity: Open, Close, On Test, Comments, and so on. The standard Activity Report runs with no changes, except perhaps narrowing the criteria by Customer or Dealer, and produces a report showing the alarms, signals, and related details from the Customer Activity Log.

Note: The report excludes the entries when someone opened the Customer record for viewing or editing.

- **Daily Signals**

  The Daily Signals Report is similar to the Customer Activity Report, with the exception of the manner in which the results appear. While the Customer Activity Report displays results by the Contract number and then by the Alarm Report number, the Daily Signals Report displays results by date only.

  The Daily Signals Report has the same advanced options as the Customer Activity Report to narrow down the results, with the exception of the **Log Record Types**. Since this report does not list alarm details, there is no need for this option.

  The Daily Signals Report will list the signals for a day or date range based on the entered criteria. The default results produce the signal date then list the signals by time with Customer ID, Signal Type (A=Alarm, S=Signal), Event Category, Signal, or Alarm Description, and if the alarm was dispatched.

- **Handled Signals by Operator**

  The Handled Signals by Operator Report is a useful management tool to view the number of alarms operators are handling.

  The report results display the operator’s User ID, Operator Name, the number of alarms acknowledged, along with the total number of alarms closed by that operator. The total number of alarms could differ greatly from the number of alarms acknowledged if:

  - The ability to cancel alarms from the Alarm Queue is allowed.
  - The operator is able to close alarms of equal or lower priority along with the alarm the operator just acknowledged and completed.

- **Last Signal Date**

  The Last Signal Date Report lists the last signal date logged to the Customer account by day or series of days. You can use a variety of filters and options.

- **Signal Count by Customer**

  The Signal Count by Customer Report will produce a report detailing the number of Signals, Alarms, and Ignored Signals for each Customer. An Ignored Signal is one that was ignored by the system, often when using a programming feature such as Entry/Exit delay. The Entry/Exit delay process will ignore any signals that are part of the Entry or Exit process if followed or preceded by an Open or Close signal.

- **UL Response**

  The UL Response Report typically is for Alarm Investigators, these will be persons of an Agency. The person subtype that represents "runner" (for which the report will be looking for) is set as one of the two options. The other option is the minimum alarm priority level that requires a UL Runner.

  "D-N-A" on a report stands for "Did Not Arrive." This means that the alarm should have had a runner (investigator) but sent none to Manitou. Therefore, "***" for the Average will be shown when there is one or more D-N-A's since that average cannot be calculated.

- **Unrestored Signals**

  The Unrestored Signals Report typically is run to verify if alarms received a Restore Signal, or if the account requires maintenance to clear out closed, but unrestored alarms. The report lists all alarms that are in Restore Required status but have not yet been restored.

  Also, if the optional setting of **Track Additional Statuses** is set to **Yes**, the additional panel statuses could also be unrestored. These additional panel statuses are not restored by an alarm restore and therefore, can pile up and create Restore Overdue Signals when the alarm itself is restored.

  Note: When run on default settings, the report will find all signals that are unrestored for greater than ten minutes and sort the results by date.

- **User History**

  The User History Report is designed to show operator log on and log off information. You can choose to include all historical information or limit the report to log on or log off information.

Maintenance

- **Access Control Card Lookup**

  The Access Control Card Lookup Report provides a list of specific Access Control Cards detailed in one report. This list can be useful as a scheduled report for Customers who use Access Control to view when employees have accessed the building.

- **Access Control Cards/PINs**

  The Access Control Cards/PINs Report provides a detailed list of Customers at a site who use Access Control and might want to view a master report of employees at the site with Access

Control Cards or PIN numbers. The report includes the Transmitter ID, the Card ID, the name of the person to whom the card belongs, and the Type of card.

- **ASAP Validate**

  The ASAP Validate Report lists bulk validation of Customers with CSAA ASAP retransmission to Authorities. You can use a variety of filters and options.

- **Audit Trail**

  The Audit Trail Report is a system trace that details transactions relating to a Customer account. You can use a variety of filters and options.

- **Billing Reconciliation**

  The Billing Reconciliation Report produces a list of Customers who have inconsistent billing setup information between Sedona and Manitou CS. This helps to find inaccuracies and make necessary corrections to Customer accounts.

  Note: The report allows you to designate Dealer, Branch, and Customer, and includes a reverse check and inactive accounts as well as specifying **Errors Only**.

- **Customer Add/Del**

  The Customer Add/Delete Report shows all added and removed Customer records for a specific period of time. The Customer Add/Delete Report produces two different sets of results depending on whether or not you select the **Include Details** check box, which is selected by default. It is also automatically set to the current day and to **Include All** additions and deletions, grouping the **Summary By Date** by default as well.

- **Customers with Transmitter Type**

  The Customers with Transmitter Type Report is a useful maintenance tool, as it produces a list of Customers and their Transmitter Types within the Manitou system. This report can help with moving Customers to newer and better equipment.

- **Maintenance Issues**

  The Maintenance Issues Report lists all maintenance issues listed for Customer accounts by the Service Manager. You can use a variety of filters and options.

- **Permit Exception**

  A Permit Exception occurs when an Authority requires a permit, and the Customer cannot produce one. You can customize this report by **Customer Name** or **ID**, **Dealer ID**, or **Branch ID** and narrow it down by a specific **Group**, **Class**, and **Authority ID**.

- **Permit Expiration**

  The Permit Expiration Report is designed to list all the police, fire, and medical permits that have expired. If a permit expires, the Customer must renew it, or they might not get service from the Authorities.

- **Where Used on Contact List**

  The Where Used on Contact List Report will produce a listing of the Customer, Dealer, Branch, Authority, Agency, records where the selected entity is listed on the Contact List.

  Entities that can be listed on a Contact List:

  - Monitoring Company
  - Dealer
  - Agency
  - Branch
  - Authority
  - Customer
  - Global Keyholder (Contact)

Master File

- **Access Control Card Formats**

  The Access Control Card Formats Report provides a list of Access Control Cards associated with a certain format. The only search criteria needed to run this report is a **Format Number**. If no format number is entered, the report will list all Access Control Cards.

- **Accounting Companies**

  The Accounting Companies Report provides a report of all accounting companies linked to the Manitou system, the direction it is linked (for instance, Accounting to Manitou), as well as the DSN, username password, and server associated with the particular accounting company.

- **Agency Master File**

  The Agency Master File Report lists the details of the Agencies within the Manitou database. This report can include or exclude as much or as little information as wanted.

- **Application Types**

  The Application Types Report produces the same information that is available within the **Application Types** form in the Manitou Supervisor Workstation. The report does not require any user-entered criteria.

- **Audio**

  The Audio Report provides an itemized list of all audio device types in the system.

- **Authority Master File**

  The Authority Master File Report lists the details of the Authorities within the Manitou database. This report can include or exclude as much or as little information as wanted.

- **Branch Master File**

  The Branch Master File Report lists the details of the Branches within the Manitou database. This report can include or exclude as much or as little information as wanted.

- **Cities**

  The Cities Report lists the cities based on entered criteria.

  Important: The information entered into the **Region** and **City** fields must match the spelling of the city and state/region as it has been entered in the database.

- **Class Codes**

  The Class Codes Report lists the Class Codes currently available within the database. It is not necessary to enter or select any criteria to receive a listing of all the Class Codes within the database; however, if you want to view Class Codes within a specific range, then criteria can be entered into the **Class From** and **To** fields.

- **Contact Point Types**

  The Contact Point Types Report lists all the different Contact Point Types available within the Manitou system. These include Telephone Numbers, Email Addresses, Pager and Fax Numbers, and Web Addresses. There are no user-entered criteria because the report only has one output.

- **Control Panels**

  The Control Panels Report lists the control panels within Manitou and their details. It is possible to run this report with and without details; however, you can enter search criteria in the **From** and **To** fields as well as specify a detailed view, if needed.

- **Countries**

  The Countries Report produces the country details available in the Manitou Supervisor Workstation. Most companies will only have one country; however, if necessary, this report can be limited to one or all selected countries. The report output only displays the Country Options Telephone and Time information and the Mailing Address Layout information.

- **Customer Master File**

  The Customer Master File Report contains all the data housed within the **Customer** form. Operators can adjust the report parameters to view as much or as little of the Customer information as needed. The report is designed to provide a reference if Customer data has been lost and it is necessary to enter the data back into Manitou. The report is not designed for manual alarm handling.

  Note: The Customer Master File Report can be run in several forms to provide account-specific details from Customer records.

Search Criteria

- **Commission Date** – The date the account was activated.
- **Create Date** – The date that the account was initially created within the database. This is not a date easily located through the user interface.
- **Last Updated Date** – The date the last data change occurred within the Customer record. If an operator edits and saves the record without making any change to the Customer data, this does not update the last updated date.
- **Marked for Reprint** – The check box on the **Customer Save Notes** dialog box, where **Mark Customer for Reprint** is selected, sets this value and the report server, then looks for the records with this value. This value is reset when the **Reset Reprint** box is selected.
- **Reset Reprint Flag after Publishing to Printer** – This will reset the **Marked for Reprint** flag on all Customer records included in this report's parameters. This value is reset when the **Reset Reprint** check box is selected.
- **Suppress Passwords** – This will change the passwords printed in this report to asterisks.
- **Suppress AR No**. – This will change the accounts receivable number printed in this report to asterisks.
- **Mail Format** – This will output the reports in a format that is ready for folding and placing in window envelopes. This option is not enabled unless the **Page Breaks** option is cleared. **Mailing Format** assumes page breaks, therefore, there is no need for the additional check box.
- **Page Breaks** – This check box will force page breaks between the groups by options.

- **Dealer Master File**

  The Dealer Master File Report allows the ability to generate a hard copy of the Dealer account information. This report will only contain Dealer-specific information.

- **DNIS Maps**

  The DNIS (Dialed Number Identification Service) Maps Report will display mappings used within the system.

- **Event Categories**

  The Event Categories Report allows for narrowing of Event Category data. If there are Event Categories specified for a single Monitoring Group, this information will also be listed. The default results show all the Event Categories for all Monitoring Groups. The only filtering for this report is based on the **Monitoring Groups**.

  All Event Categories for this report will print every time. The only restriction is based on the Monitoring Group.

- **Event Codes**

  The Event Codes Report will list Event Codes and their details. This could potentially be a very large report when run on the defaults, so Bold Technologies recommends narrowing the results by selecting specific search criteria.

- **Event Maps**

  The Event Maps Report shows the relationship of how a signal arrives at automation and how Manitou translates it. This information will show where it is not necessary to program signals that Manitou already knows how to translate.

  Users can streamline the report by selecting **Dealer ID** and choosing **Protocol Types** as well as how the report is grouped.

- **Global Holidays**

  The Global Holiday Report lists the entered global holidays listed within the Manitou system by country. You can simply select which countries you want to view global holidays, as well as the format (**Month, Day** or **Day, Month**) in which the report will format the report results.

- **Global Keyholder Master File**

  The Global Keyholder Report lists the Keyholders that have Contact IDs tied to their information. Bold Technologies suggests running this report without parameters to produce the best results. You can customize the report to display as little or as much information as necessary.

- **Group Codes**

  The Group Codes Report lists the Group Codes for the Manitou system.

  You use Group Codes to categorize Customer accounts. These are very similar to Class Codes; however, reporting and Dealer billing is designed for Class Codes. Select the appropriate **Group Code** from the drop-down list and click **Next** to continue running the report.

- **Locales**

  The Locales (also known as Languages) Report produces a list of the languages within the system. This report does not require any user-entered data.

- **Monitoring Company Master File**

  Like the Customer Master File, the Monitoring Company Master File Report produces details of the Monitoring Company record. You can adjust the report parameters to view as much or as little of the information as needed. The report is designed to have a reference if the Monitoring Company data has been lost and it is necessary to enter the data back into Manitou.

- **Monitoring Groups**

  The Monitoring Groups Report will display a list of all current Monitoring Groups.

- **Monitoring Types**

  The Monitoring Types Report will display a list of current Monitoring Types in Manitou.

- **Output Device Types**

  The Output Device Types Report provides a list of all Output Devices currently configured in the Manitou system. The report includes the attributes, Device Type (such as a numeric pager), Protocol, Rows, Columns, Scripts, whether the text is wrapped, Pager Entry, and Service Codes associated with each differing Device Type.

- **Permit Types**

  The Permit Types Report provides a list of all permits for certain countries. For example, if a Permit Types Report is run on the United States, Permit Types for the police, fire, and medical will be displayed in the report.

- **Post Codes**

  The Post Codes Report simply lists all postal codes (or zip codes) within a certain region or city. For example, entering the city "Colorado Springs" into the **City** field will bring up a list of all postal codes currently entered into the Manitou system for the city of Colorado Springs.

- **Receiver Line Prefixes**

  The Receiver Line Prefixes Report lists all Receiver Line Prefixes currently configured in the Manitou system.

- **Receiver Types**

  The Receiver Types Report provides a list of all Receiver Types currently configured in the Manitou system.

- **Receivers**

  The Receivers Report provides a detailed list of configuration criteria for each type of Receiver for each FEP (Front-End Processor). The report includes the Receiver Number, Receiver Code, Receiver Description, Type, Port, Settings, Default Line Prefix, Default Monitoring Group, Line Prefix, and Transmitter ID.

- **Regions**

  The Regions Report provides a list of all regions and abbreviations currently in the Manitou system.

- **Resolution Codes**

  The Resolution Codes Report lists all Resolution Codes for a particular country or "group." The report shows the two-letter code, a description of the code, and the alarm condition. Users might want to use this report as a listing of alarms or signals closed with a specific Resolution Code, such as False Alarms.

- **Reverse Channel Routes**

  The Reverse Channel Routes Report displays a list of all protocols currently configured in the Manitou system, as well as description of the Protocol, Application Type, Receiver Line Prefix, if the Reverse Channel is associated with a Dealer, the FEP Number, Receiver Number, Line Number, and Receiver Code.

- **Script Messages**

  The Script Messages Report provides a report of all current Script Messages entered into the Manitou system. This report includes details on the Script Message name, the type of Script Message (such as email), and the text of the Script Message.

- **Service Provider Device Types**

  The Service Provider Types Report gives a detailed list of all Service Provider Types currently configured in the system. The report includes the Protocol Type (such as TAP), Address, ID, Account Name/Password, if the protocol is Dialup, Timeouts, Values and Port Settings.

- **Subtypes**

  The Subtypes Report provides a detailed list of all subtypes currently configured in the Manitou system. The report lists the Type (such as Agency) and the Subtypes and Description.

- **Temporary Comment**

  The Temporary Comments Report lists the Temporary Comments listed in Customer's records. The Temporary Comments in a Customer record display to operators upon loading an alarm for that Customer. Users might want to use this report to see vital comments, such as a Customer vacationing during a specific time period, or other special instructions regarding an account.

- **Time Zones**

  The Time Zones Report provides a list of all time zones currently entered in the Manitou system.

- **Transmitter Protocol Formats**

  The Transmitter Protocol Format Report provides a list of all Transmitter Protocol Formats currently configured in the Manitou system. The report includes the Transmitter Type, Signal Type, and Condition Picture, as well as other Area and Zone details.

- **Transmitter Types**

  The Transmitter Types Report provides a list of all Transmitter Types currently entered into the Manitou system. Users can choose to filter the report by **Transmitter Type** or **Reverse Command Protocol**. The report also has the option to **Include Programming** in the report details.

- **User Groups**

  The User Groups Report provides details pertaining to all User Groups currently entered in the Manitou system. The report lists the name of the User Group, Maximum Activity, Accounting User ID, as well as the Call Types accepted by the User Group, such as Cancel Alarm, Confirm Alarm, or Schedule Change.

- **Users**

  The Users Report provides details pertaining to all users currently entered in the Manitou system. The report includes details on User ID, Name, Contact Point, Locale, Country, Profile, Password Changes, Alarm Queue Accessibility, and Accounting Access.

- **Window Codes**

  The Window Codes Report lists all Schedule window codes currently entered into the Manitou system. The report will list the Code, Description, and Minutes Before/After.

- **Workstation Group**

  The Workstation Groups Report lists all workstation groups currently entered into the Manitou system. This report requires no user-entered data.

- **Workstations**

  The Workstations Report provides a list of all workstations currently entered into the Manitou system. The report includes details on a specific workstation, such as which workstation is associated with a ManitouNEO client, the Description, Security Level, when the workstation was last active, Monitoring Group, Attributes, Locale and Time Zone.

System

- **Customer Count**

  The Customer Count Report lists Customer status for all Customers in the system. You can group the report by **Dealer**, **Branch**, or **Class Code**, and the report includes summaries. You can choose to order the report by **Customer ID** or **Customer Name**.

- **Customer Services**

  The Customer Services Report will produce a list of all current monitored services, including Pending, Active, Inactive, and Deactivated statuses. The report also has the option to include only services that are chargeable.

- **Customer Status**

  The Customer Status Report displays only the current status of the Customer or Customers for which the report is run. You can also run this report to find the Out-of-Service status of Customers. To get a proper On Test Report, leave all options blank with the exception of the **Report Description** and **Priority**.

  Note: The Customer Status Report provides different outputs, depending on what options you select.

- **Customer Status Change**

  The Customer Status Change Report lists all status changes in a specified date range. You can search for data **Dealer ID**, **Branch ID**, or **Class**. The **Class** search parameters are defined by **Weekly Activity**, **Monthly Open Close Activity**, or **Regular Account Activity**.

  The details in this report list all signal/alarm details, Open and Close activity, and any Exception activity (for example, unexpected Openings/Closings).

- **Dealer Billing**

  The Dealer Billing Report calculates a Dealer's billing invoice based on his or her specific Dealer charges housed within the record. You can only specify this report by **Dealer ID,** and you can include either mail format or specific details.

- **False Alarm Summary**

  The False Alarm Summary Report gives a listing of all False Alarms received within a specific date range. Search parameters can be limited to **Dealer ID**, **Branch ID**, or **Authority ID** and you can group them by either **Dealer** or **Branch**, if preferred.

- **On Test**

  The On Test Report lists all systems that are recently, currently, or will be On Test. You can search by **Customer ID**, **Dealer ID**, **Branch ID**, **Group**, or **Class**.

- **Operator Timecards**

  The Operator Timecards Report lists the times an operator logs in and out of Manitou. Search parameters are limited to searching by **Date** (time) and **User ID**.

- **Raw Data Log**

  The Raw Data Log Report displays details of all alarms and other signals received from the alarm receivers connected to the system based on a specific date range. You must specify a **Receiver Line Prefix** and/or a **Transmitter ID**.

  Note: If you do not specify search parameters, the report will not list any details.

- **Receiver Line Loading**

  The Receiver Line Loading Report lists either all or the selected receiver's limits, usage and availability. Limits refers to the UL specific guidelines for the number of Opens or Closes allowed on the particular receivers.

  Central station managers and operators should refer to their UL representative for more information.

- **System Connection Status**

  The System Connection Status Report lists the system status of Customers under certain Dealers, Branches, Authorities, Groups, or Classes. You can also run the report on just one Customer without any additional search parameters.

- **System Log**

  The System Log Report provides a detailed list of all log on and log offs to the system, and the **Category** where a user made Adjustments, Qualifiers, and Event Text.

- **Transmitter Count by Receiver**

  The Transmitter Count by Receiver Report provides a list of all Receiver Types or Receiver Line Prefixes based on FEPs (Front-End Processors) or receivers. The report includes details of FEP number, Receiver number, Receiver Types, and Receiver Line Prefixes, among other details.

- **Transmitter Count by TX Type**

  The Transmitter Count by TX Type Report lists all transmitters currently in the system by **Transmitter Type**. You can limit the search to include only a specific **Transmitter Type**, by **Customer ID**, **Dealer ID**, or **Branch ID**.

- **Unused Transmitters**

  Unused Transmitters are Transmitter Numbers within a Transmitter Range, set up within the Dealer and Monitoring Company records that have not yet been assigned to a transmitter on a Customer record.

- **User Statistics**

  The User Statistics Report provides the details of each operator's user session including the log on and log off times, total session time, number of accounts edited, added and deleted, and the number of alarms handled of priorities 1 – 4 and 5 – 10. This information is mined from the **User Status** form found in the Manitou Supervisor Workstation.

Scheduled Reports

The Scheduled Reports option provides the means to create reports that can be published automatically by Manitou Neo according to a specified schedule.

The Scheduled Reports form contains a list of all reports that currently exist in the system. Any report contained in the list can be selected for viewing or editing by clicking the appropriate report. The Distribution step provides a list of recipients for the instruction selected on the Scheduled Reports form.

To add a Scheduled Report, click the Add icon on the form. The first thing you're prompted to do is select a report from the Report List. Once you select a report, enter the parameters for the report type at each form until done.

Report History

The Report History form displays a list of reports that you have run. When you select (click) a report, you are then prompted to take action for the selected report: Display Now, Download, Publish, Re-Queue, and Delete.

Branding

With Branding you can:

- Change the color scheme of BoldNetNEO for Dealers or Customers simply by clicking a color.
- Upload your own logo by clicking Upload.
- Set the option as to whether or not Dealers or Customers can personalize their theme.

Settings

When you click Settings , you have the following options:

- You can select a default setting for descriptions of options. If you select Beginner, all descriptions display by default. If you select Advanced, all descriptions are collapsed (hidden) by default, but can be expanded. The Collapsed view is indicated by and the Expanded view is indicated by .
- You can change the System color theme simply by clicking a color.
- You can view the version of BoldNetNEO you are using.

Customer Account Options (Dealers and Branches)

For the actions you can take on Customer accounts as a Dealer or Branch, see the next section, *Customer Accounts* and the related subsections.

Note: As a Dealer or Branch you have greater control over Customer accounts than do Customers.

Customer Accounts

Monitoring Companies and Dealers have greater control over Customer accounts than do Customers themselves. The difference in control for Customers is noted in these sections as applicable. However, the main thing for you to note is that Customers can only see their own account information whereas Monitoring Companies and Dealers can view and act upon multiple Customer accounts.

Dashboard

The following options are available from the Dashboard if you log on as a Customer. For information on Dashboard options for Dealers and Branches, see Dashboard, page 13. For information on Dashboard options for Monitoring Companies see Dashboard, page 9.

Customer Status

The Customer Status provides the condition for the following:

Note: You can select from and act upon these Account Statuses by clicking the related item.

- **Alarm (OK, In Alarm)** – The color that relates to an alarm status can be customized and is defined through the Manitou Supervisor Workstation.
- **Monitoring (Active/Inactive/Deactivated)** – A green vertical indicates the System is active, yellow is inactive, and red is deactivated.
- **Maintenance (Resolved/Unresolved)** – A green vertical bar indicates no maintenance issues, red indicates there are one or more unresolved maintenance issues.
- **Service (Full Service, Partially On Test, Whole System On Test)** – A green vertical bar indicates Full Service, and nothing is On Test, yellow indicates the System is partially On Test, but not the entire System, and red indicates the whole System is On Test.
- **Area (Open, Closed, Unknown)** – A yellow vertical bar indicates the System is open and disarmed, blue indicates the System is closed and armed, and red indicates an unknown System status (the System has not received an open or closing event to identify current status and is therefore unknown).

System Status

Each System on the account is identified by name (for example, System 1).

Note: You can select from and act upon these Account Statuses by clicking the related item.

TX – Displays the Transmitter status.

- **Green** – The Area is good.
- **Blue** – The Area is "closed."
- **Yellow** – The Area is "open."
- **Red** – A warning or issue.

Area – Displays the Area status.

- **Yellow** – The System is open and disarmed.
- **Blue** – The System is closed and armed.
- **Red** – The System has not received an open or closing event to identify current status and is therefore "unknown."

On Test Status

If you are On Test, this form provides the Type of test, the Description of the test, and the date range.

Customer Activity Log

The Activity Log lists all actions taken on the Customer record. This includes:

- Signals/Alarms
- Views/Edits/Saves
- Password Validation
- Comments Addition
- Alarms and Processing

When viewing the Customer Activity Log, the most recent activity is always located at the top of the record, in chronological order. To see the details of a particular activity simply double-click the activity.

Details

The Details option displays Address, Contact, Customer Activity Log, and Account Statuses.

- **Address** – The Address form displays the current address information. You can start a Watch list for yourself, edit your Address, and expand/collapse address Details.
- **Contacts** – This window is used to enter additional Contact information such as site type, phone numbers and extensions, scripts (defined call communication), Contact Schedules, email address, and web information.
- **Customer Activity Log** – The Activity Log lists all actions taken on the Customer record. This includes:
    - Signals/Alarms
    - Views/Edits/Saves
    - Password Validation
    - Comments Addition
    - Alarms and Processing

  When viewing the Customer Activity Log, the most recent activity is always located at the top of the record, in chronological order. To see the details of a particular activity simply double-click the activity.

Account Statuses

Regardless of how you're logged on, as a Monitoring Company, Dealer or Branch, or Customer, once you're in a Customer account the following statuses are displayed, no matter the Customer window or form you're on.

Note: You can select from and act upon these Account Statuses by clicking the related item.

On Test

There are two On Test options, Simple and Advanced. The simple On Test mode allows you to enter a Reason for the test and to designate a duration in Hours and Minutes. The Advanced On Test mode allows you to set day and time durations, and to select specific System components for the test.

Note: Once a Customer has been put On Test, the Current On Test section of the Customer form displays the day and time information for the On Test, as well as the Reason.

Customer Status

See Customer Status, page 37 for details on using the Customer Status option.

System Status

See System Status, page 38 for details on using the System Status option.

Systems

If you Click Systems , a summary of Customer Systems and Monitoring details appear. The Systems are used to set the configuration of how a signal will find this account when it arrives from a Receiver.

Notes:

- You can select from and act upon these Account Statuses by clicking the related item.
- You have the ability to add Systems and edit Monitoring Details. For more information, see Monitoring Details, page 14, and Systems, page 15, and their related subsections.

As you click and navigate through Systems, they are structured as follows:

Types of Systems

- **Event Monitoring** – This System is for checking the type of alarm being presented.
- **Access Control** – This System is for recording the in and out access by people for a given property.
- **GPS Tracker** – This System provides location information about assets for tracking, locating, and other directional-based services.
- **Other** – This System is a catchall to give you a way to include other types of Systems that don't fall into Event Monitoring, Access Control, or GPS categories. By creating an "Other" System, you can tie it to a Monitoring Service which the central station can automate billing for through accounting integration.

Names of Systems

This is the next level of detail indicating the names of Systems.

Features of Systems

- **<System Name>** – This form is used to manage System information, and view Users and Transmitter Summary information associated with the System.
- **<Transmitter Name>** – The Transmitter communicates with the alarm communication Receivers connected to the System. This option is used to view Transmitter details and manage specific Transmitter options. The specific Transmitter is identified, along with associated details such as the Protocol Type that it is using. Additionally, you can add Notes in regard to a Transmitter. For details on adding a Transmitter, see Adding a Transmitter, page 15. And, if needed, see Open/Close Schedules, page 17, and Open/Close Schedules Wizard, page 17.

- **Areas and Zones** – Once Transmitters have been set up for the Event Monitoring, Areas and Zones can be added. Areas and Zones are places inside the property where monitoring can be established and used to direct Authorities to specific areas where alarms are sending a signal. The Zones are physical locations within an Area or location, such as a front door. For details on adding Areas and Zones, see Adding Areas and Zones, page 16. And, if needed, see Open/Close Schedules, page 17, and Open/Close Schedules Wizard, page 17.
- **Programming** – The following forms are defined for Programming:
  - **TX Programming** – Programming is needed for every System to ensure proper account processing. The Programming items define and decode the information coming in from the Transmitters through the Receivers. TX Programming can be added and edited. For details on adding Programming, see Programming, page 18. And, if needed, see Open/Close Schedules, page 17, and Open/Close Schedules Wizard, page 17.

    Example:

    Some Transmitters send a generic message that an alarm sounded in a specific Area or Zone. The Receiver then passes this message to the application. However, the System doesn't know what that activation on that Area or Zone means without the Programming. The Programming is there to translate the activation on that Zone to a burglary or fire or other alarm on that Zone. Also, Programming will allow for the definition of specific actions to complete on the alarm, such as to call the Police and then the Keyholder on the account.
  - **Event Programming** – You can add and edit Event Programming to specify how particular types of alarms are handled, whether detailed in a report, sent to an email, and so on.
  - **Post Processing** – After an Event has occurred and been addressed, Post Processing is where you define how the Event was handled by selecting the Event, the Zone where it occurred, and the Action Pattern that was used.
- **Devices** – A Transmitter is a Device located on the Customer premises that communicates with the alarm communications Receivers connected to the System. The specific Transmitters are identified within this form, along with related Details.

  Note: The ability to add or edit Devices is based on your Permissions in the Manitou Supervisor Workstation.

- **User View** – A listing of people on the Contact List with User Numbers.
- **Reminders** – Reminders provide a way to perform one-time or periodic actions and checks as a service to the Customer.

  Note: The ability to add or edit Reminders is based on your Permission in the Manitou Supervisor Workstation.

Monitoring Services

You can view existing Monitoring Services that are contracted. Additionally, you have the ability to:

- Add or edit Monitoring Services.
- Select from the different Monitoring Service Groups on the Monitoring Services form and view the details on the related form.

Contact List

See Contact List, page 20 for details on using the Contact List option.

Note: For Customers, you can only manage your own Contact List information.

Call Lists

This window is used to add details for all the People, Agencies, Authorities, Dealers and/or Branches requiring contact for a given alarm. Call Lists are especially useful for commercial sites that might have differing shifts based on the time of day.

General Schedules

The General Schedules define the availability of Keyholders, Programming, Access Control, Call List Availability, and Reminder Schedules, and when you can put accounts On Test.

Note: You can add, edit, and delete General Schedules by clicking the related icon.

Open/Close Schedules

See Open/Close Schedules, page 17, and Open/Close Schedules Wizard, page 17, for details on using the Schedules option.

Note: For Customers, you can only manage your own Schedules.

Activity Log

See Customer Activity Log, page 38 for details using the Activity Logs option.

Comments

See Comments, page 21 for details on using the Comments option.

User Defined Fields

The User Defined form displays any data for the Customer that might not have had a proper location within the Customer record.

The User Defined option is for the specific use of individual Central Stations. Within the Manitou Supervisor Workstation, User Defined fields can be added to store additional necessary information about the Customer. Examples of this additional information might be salesperson information or internal accounting information.

You can edit data on the User Defined Fields Edit form. Since these fields are defined by the Central Station, data entry is dictated by what has been added and by the procedures in place at your location.

Maintenance Issues

See Maintenance Issues, page 21 for details on using the Maintenance Issues option.

Reports

See Reports, page 22 for details on using the Reports option.

Note: Maintenance Reports and the Customer Status (Unused Transmitters Report) are not available to Customers.

Settings

When you click Settings , you have the following options:

- You can select a default setting for descriptions of options. If you select Beginner, all descriptions display by default. If you select Advanced, all descriptions are collapsed (hidden) by default, but can be expanded. The Collapsed view is indicated by and the Expanded view is indicated by .
- You can view the version of BoldNetNEO you are using.