



**GENERAL SCHEDULES**

**Meeting Complex Customer Needs**

# Confidentiality and Acknowledgements

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# Introduction

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Quite often customer, or dealer, requests require some creative solutions from within Manitou. This document details the steps to take when a customer has a rotating call list that doesn't rotate on a standard period of time or at a specific time of day.

Example Customer request:

Customer submits an annual "on-call" rotation list to the Central Station. They would like the on-call person to be the only person called when the organization is out of hours. The two key elements are:

- Office hours are 07:30 to 16:30 Monday through Friday.
- Outside of those hours contact the on-call person's phone.

## Preparation

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Prior to beginning work inside Manitou, take a moment to collect all information needed to successfully create these complex call lists to the customer's specifications.

Items to review and prepare:

- Office hours are 07:30 to 16:30 Monday through Friday.
- Outside of those hours contact the on-call person's phone.
  - Who is the first on-call person that is active at this time?
  - Who are the others that will rotate on-call?
  - What time of day and which day do they transfer the on-call responsibility?
  - What is the on-call schedule?
  - Who should we contact when no one is listed as on-call?

Here is an example of the answers:

- Outside of those hours contact the on-call person's phone.
  - Who is the first on-call person that is active at this time? **John Smith 719-555-2323**
  - Who are the others that will rotate on-call?
    - **Jeremy Johnson 719-555-3232**
    - **Keith King 719-555-5656**
    - **Bryan Best 719-555-6565**
  - What time of day and which day do they transfer the on-call responsibility? **08:30 Friday mornings.**
  - What is the on-call schedule order for these people? **Hopefully this is provided to you by the end customer.**
  - Who should we contact when no one is listed as on-call? **John Smith**


# General Schedules

Now, armed with the information needed to complete this request, the first task is to create the general schedules in Manitou.

General Schedule for Office Hours:

1. Navigate to the Customer record.
2. Select the General Schedules form from the Jump To menu.
3. Give the schedule an ID such as "DAYS."
4. Enter a Description.
5. Select the type to be Call List Availability.
6. Click OK
7. Check the days of the week where this will "opt in" to the schedule. In this example, it is Monday through Friday.
8. Tab over to the Start 1 field and enter the starting time of the day.
9. Tab into the End 1 field and enter the time of day to end this availability.
10. Continue to enter days and times for when this list should be available. Please note: There is no holiday function at this time so you will have to enter in an override for the days the site is closed.

General Schedules

 Add Remove

Schedule: DAYS

Description: Business hours

Type: Call List Availability

Week								Time				Date	
	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Start 1	End 1	Start 2	End 2	From	To
▶	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	07:30	16:30				
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00:00	00:01			05/30/2016	05/30/2016
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00:00	00:01			07/04/2016	07/04/2016

Continue entering the General Schedules for all persons and availability.

Add Schedule

Schedule: C1

Description: On call John

Type: Call List Availability

OK Cancel

After entering all General Schedules for this account. Save the Record.

Operator Workstation - Manitou

File View Tools Operations Maintenance Reports Help

New Open Save Print View Edit Delete Save Cancel

Wrap Text

General Schedules

Schedule: C1

Description: On call John

Type: Call List Availability

Week								Time				Date	
	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Start 1	End 1	Start 2	End 2	From	To
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	08:30	23:59			05/27/2016	05/27/2016
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00:00	23:59			05/28/2016	06/02/2016
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00:00	08:29			06/03/2016	06/03/2016
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	08:30	23:59			06/30/2016	06/30/2016
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00:00	23:59			07/01/2016	07/07/2016
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00:00	07:29			07/08/2016	07/08/2016

Jump To

- Customer
- Details
- Options
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- OTC Schedules
- Contact List
- Call Lists
- Alerts
- Perms
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- Action Patterns
- General Schedules
- Plans
- Reverse Command
- User Defined
- Reports
- On Test Status
- Zone Status
- Reverse Send
- Maintenance Issue
- Activity Log
- Access Control

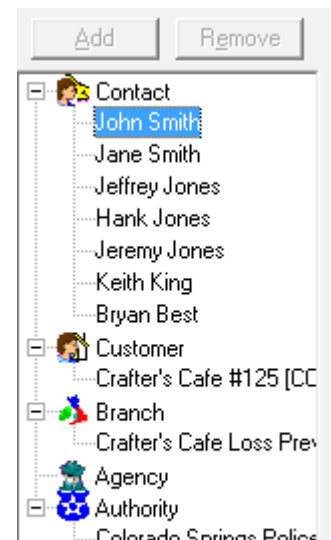
Nav: F2 Notes: F3 Alt: F7

# Contacts and Call Lists

With all general schedules created it is time to ensure that the contact person are on the Contact List and create the call lists on the account.

## Contact List verification:

1. Navigate to the Contact List on the Jump To menu.
2. Visually verify the persons are on the contact list. If they are not: click Edit then add the missing individuals.
3. When all contacts are on the contact list with their contact points entered, click Save.



## Call List Addition:

1. Navigate to the Call List form on the Jump To menu.
2. Click Edit.
3. Click Add.
4. Enter the Call list name/ID
5. Enter a Description.
6. Select if this is a Main or Sublist. A Main List may contain persons and entities. A Sublist may only contain people.
7. Click Add to Matrix.
8. Repeat the process

**Add Call Lists**

Call List

Name:

Description:

Type:

Member Matrix

☐ Display Contact Points

Call List Members										
Type	Contacts	C1	C2	C3	C4	C5	OOH	RESP		
Keyholder	John Smith	1				1		1		
Keyholder	Jane Smith							2		
Keyholder	Jeffrey Jones									
Keyholder	Hank Jones									
Keyholder	Jeremy Jones		1							
Keyholder	Keith King			1						
Keyholder	Bryan Best				1					
Branch	CC - Crafter's Cafe Loss Prevention									
Authority	CSPD - Colorado Springs Police									
Authority	CSFD - Colorado Springs Fire									
Authority	AMR - American Medical Response									
Customer	CC125 - Crafter's Cafe #125									
Sublist	C1 - On call John S.							1		
Sublist	C2 - On call Jeremy J									
Sublist	C3 - On call Keith K									

OK Cancel

until all call lists are entered. Remember! to include the Out of Hours Main call list calling the first Sublist and the "When All Else Fails" call list containing the person to call when there is not an active person shown to be on call.

9. Click OK.

# Adding Schedules to Call Lists

After all call lists are created and showing, return to the Main lists and the first list to be called during business hours. Select the Availability and which Call list to defer to when outside of the defined hours.

Call List: RESP  
Description: Responsible Parties  
☐ Rotation List Active  
Next Rotation: 00:00  
Interval (Days): 0  
Availability: DAYS  
Defer to list: OOH  
☐ Show suppressed contacts

Contact  
John Smith [Keyholder]  
Jane Smith [Keyholder]  
Jeffrey Jones [Keyholder]  
Hank Jones [Keyholder]  
Jeremy Jones [Keyholder]  
Keith King [Keyholder]  
Bryan Best [Keyholder]

Customer  
Crafter's Cafe #125  
Site ((719) 852-8528)  
E-Mail  
(cc125@crafterscafeemailaddress.com)

Call Lists  
C1 - On call John S.  
C2 - On call Jeremy J.  
C3 - On call Keith K.  
C4 - On call Bryan B.  
C5 - WAEF - When All Else Fails

Branch

☒ Must Contact  
☐ Does Not Rotate

Next Go to the 'Defer to' List and ensure that the list has the first Sublist selected.

At this point it is good practice to save the record.

Call List: OOH  
Description: Out of Hours Call  
☐ Rotation List Active  
Next Rotation: 00:00  
Interval (Days): 0  
Availability:   
Defer to list:   
☐ Show suppressed contacts

Contact  
John Smith [Keyholder]  
Jane Smith [Keyholder]  
Jeffrey Jones [Keyholder]  
Hank Jones [Keyholder]  
Jeremy Jones [Keyholder]  
Keith King [Keyholder]  
Bryan Best [Keyholder]

Customer  
Crafter's Cafe #125  
Site ((719) 852-8528)  
E-Mail  
(cc125@crafterscafeemailaddress.com)

Call Lists  
C1 - On call John S.  
C2 - On call Jeremy J.  
C3 - On call Keith K.  
C4 - On call Bryan B.  
C5 - WAEF - When All Else Fails

Branch

☒ Must Contact  
☐ Does Not Rotate

# Adding Schedules to Call Lists, cont.

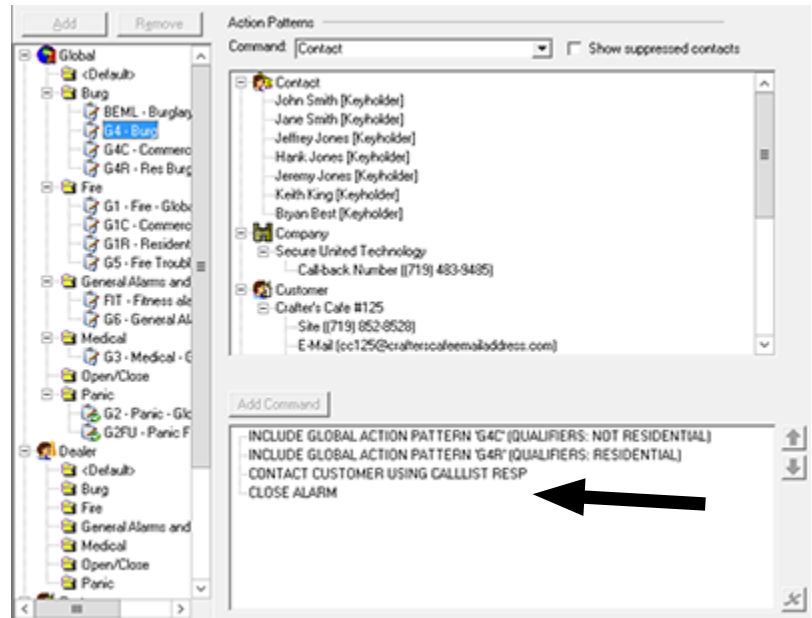
Next, return to Edit mode and add the schedules and defer to for all your on-call staff.

Remember to defer the last call list to the When All Else Fails call list. This is who to call when there is an issue with the on-call list.

# Action Pattern

In order to test the solution, there must be an Action Pattern that calls the call list for this to work. Please note, that if this first call list is called, in most action patterns, a change to the Action Pattern is not necessary.

- Navigate to the Action Patterns section of the Customer record and click Edit.
- Select the action pattern to be used for this call list.
- Select the Daytime Main Call list, in this example it is the RESP - Responsible Parties Call List.
- Click Add Command.
- Move it up, or down, in the action pattern.
- When it is in the correct position click Save.



## Test

With all elements in place, it is time to test the solution. If the current day and time is within the first call list availability, add a single line to the DAYS General schedule to make the hours available from 07:30 to current time then in the Start 2 field enter a time approximately 15 minutes from now, to allow for the testing, then set the End 2 to the 16:30 time. Once that is correct, save the record and send a manual signal (a quick reference guide is available in the BoldGenius Resource Library) that will trip the selected action Pattern.

- Did the correct Action Pattern show?
- When selecting 'Do' on the RESP call list Action Pattern did the Out of Hours Show on the "Process Action Call List?"
- When drilling into the OOH call list did the correct person on-call show?

If the answer is yes to all of these questions, you are good to go.

A good practice is to ignore the deepest contact action to show that the correct call list person showed to the operator in testing.



# Troubleshooting

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Here is some guidance for troubleshooting these three items if they fail.

- Did the correct Action Pattern show? No.
  - Check the Event Actions Programming on the customer, transmitter, and check the default action pattern for the Event Code. There is usually something overriding the default Action pattern for the event.
  - If needed, you may add an Event Actions Programming line to your testing event code to be sure the correct action pattern is directly linked to the event.
- When selecting 'Do' on the RESP call list Action Pattern did the Out of Hours Show on the "Process Action Call List?"
  - Is the action pattern right? If not, see above.
  - Is the RESP call list linked to the correct General Schedule?
    - Did you save the change to the General Schedule to put the DAYS schedule out of hours?
- When drilling into the OOH call list did the correct person on-call show?
  - Does the person have the correct General Schedule?
  - Are there any conflicting days/times?

There is often a clear reason as to why the call list fails. It is important to take care and be sure to validate all the information in the record is correct.

With a little planning, and some trial and error, it is possible to meet many customer requests utilizing Manitou's core features.