



VIRTUAL OPERATOR
Action Patterns

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Virtual Operator Action Patterns

What is the Virtual Operator?

The Virtual Operator is sometimes referred to as the “AutoClient.” This is a service that runs on Manitou systems which inspects each action pattern tied to an alarm and sees if there are actions that do not require one human being to speak to another and does those actions. These actions can be to email, text, fax, make an automated telephone call or a combination of things.

Sometimes, the Virtual Operator will do all the actions and, as an operator, you will not receive the alarm. Other times, the Virtual Operator will do only the first one or two actions then defer the alarm to an operator.

Objectives

In order to create a Virtual Operator Action Pattern from beginning to end, you will need to have access to both the Operator and Supervisor Workstations.

During this course we will cover:

- Preparing for and Planning a Virtual Operator Action Pattern
- Write a Script message
- Building an Action Pattern
- Linking the Action Pattern to the Event(s)
- Testing the solution

It is important to consider what your goals are before jumping in and creating Automatic Action Patterns to ensure that the goals of the company and customer needs are met. In this example we are assuming that a customer wishes to receive automatic notifications of Trouble, Power Failures, Low Batteries and the like, and not receive calls.

Preparation

When planning an automatic action pattern you must know the following:

What customer need is this meeting? Why are you thinking an automatic action pattern is the right solution?

When does the action need to happen? Does the customer, or Dealer, need the notification at the beginning of the alarm? Or, at the end after the alarm is closed?

Does this solution make the most sense?

Understanding the business or customer need first, saves time when implementing a solution. Sometimes, it may make sense to write it down on paper or build a flow chart of the process to better understand the customer need.

Within this guide we assume that it is the right solution and it does make sense. Here we are creating an automatic action that will email the customer a simple notification of a Trouble event and then close the alarm.

Build a Script Message

The first step is to build a message that will properly insert the key information at the time of the alarming event to be included in the message to the customer. For the most part, script messages are built within the Supervisor Workstation.

- After logging into the Supervisor Workstation navigate to the Maintenance menu and locate the Script Messages form.
- Click Edit, click Add.
- Within the dialog, enter a description that will be clear and simple, select the correct language for the message, then select the type of message. Generic can be used in many places, Pager, Fax, Email and PBX Assistant can only be used when the contact points are of those type. For this example we are going to select Email.
- The focus lands on the Script text field. There you enter a combination of plain text and script codes, a complete list of codes is attached to this course, to build a notification that, at the time of the alarm will load with the appropriate information.

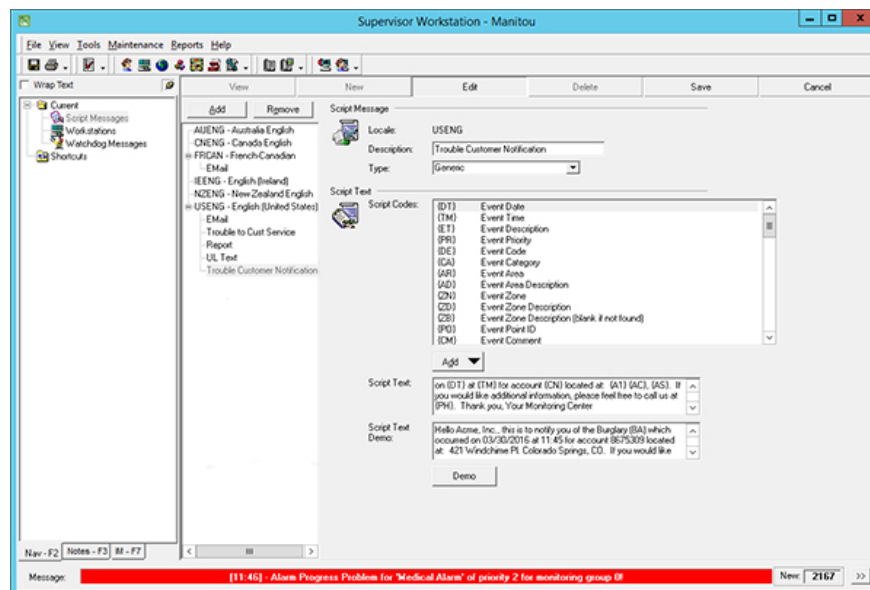
This is an example of what we would like to have the message look like with the key elements loaded:

“Hello [customer name], this is to notify you of the [event description] [event code] which occurred on [event date] at [event time] for account [customer id] located at: [customer address line 1] [city], [state]. If you would like additional information please feel free to call us at [callback number]. Thank you, Your Monitoring Center”

How this is entered into Manitou is:

“Hello {NA}, this is to notify you of the {ET} ({DE}) which occurred on {DT} at {TM} for account {CN} located at: {A1} {AC}, {AS}. If you would like additional information, please feel free to call us at {PH}. Thank you, Your Monitoring Center”

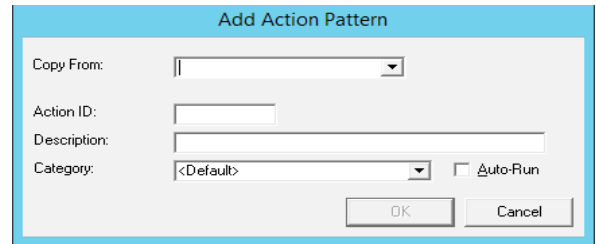
Now that we think we have everything as it should be click Demo to see it with some demo data inserted. If it reads correctly the script is ready to save.



Build an Action Pattern

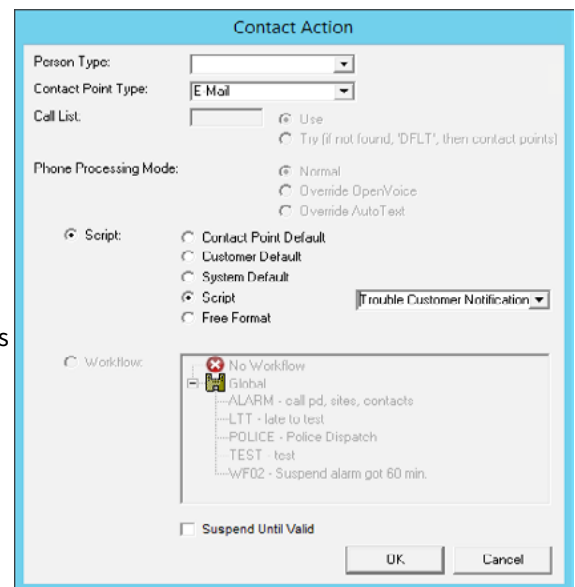
The next step is to build an Action Pattern. The Action Patterns are found in the Operator Workstation and can be created on the Customer, the Dealer, and the Monitoring Company levels. For this example this will be built on the Monitoring Company record. Upon loading the record, navigate to the Action patterns form.

- Click Edit then Add to add a new action pattern. Unless there is a similar action pattern already there, do not copy from an existing Action Pattern.
- Give it a name, for example TROUBLE, the ID can be a maximum length of 8 characters.
- The description field allows for 35 characters for more detail. For example: “Auto-notify on Trouble events.”
- Click OK



The action pattern loads in the application frame. The default command is set to Contact. There you see a listing of company contacts and Monitoring company details. To use this in many places it is important to avoid specific company contacts for most events; therefore, collapse these sections and locate the Customer node.

- Click Customer, so that the title “Customer” is now highlighted with a blue background.
- Next, click Add Command.
- Within the Contact Action dialog you are provided with options of what you may want to add.
- Select Email. What this does is it will go to the Customer with this action pattern and look for an Email on the Customer Details page. If there is nothing there the Virtual Operator will defer the alarm to an operator when it can’t email.
- Next select the new script message
- Click OK.



The new action pattern line should load with Contact Customer at Email using Script Message xxxx. There are times where the “using” section does not load. You may confirm if it works correctly in Testing. The Action Pattern is not yet done because the Virtual Operator needs to know that it is okay to close the alarm. This is found under the command option of Close. If your operation requires a resolution code be entered you will pick the correct one for this action pattern such as “Closed by AutoClient.” Without the resolution code the Action pattern may drop to an operator to close the alarm. Once again, click Add command to place the close command at the bottom of the action pattern. Then click Save.

Tie the Action Pattern to the Event(s)

There are several places where you may tie an Action Pattern to an event:

- Customer
- Dealer
- Transmitter type record
- Event Codes form
- Event Categories, not recommended.

In this example, we apply that new Action Pattern to an event within the Customer record.

Within the customer record navigate to the programming form and click edit.

- Customer Record
- Systems form
- Programming

Within the Event Actions Programming section, click an available line and enter an Event code. For this example we are using TT (test trouble).

Then we tab over to the Actions column and drop down the list to pick the Action Pattern created earlier. If the event was tied to a specific Area or Zone enter it in this section.

Save the Customer record when finished.

Transmitter Programming

Show merged Transmitter Programming for Transmitter:

Input					Output							
	TX	DES	Area	Zone	Sensor	Event	Description	Area	Zone	Sensor	Point ID	Commands
▶	1	BA4	"	"	"	BA4	Entry/Exit Burg	=	=	=		CanCancel(*, " : :
	2	BA2	"	"	"	BA2	Interior Burg	=	=	=		Cancel()
*												

Event Actions Programming

	Event	TX	Area	Zone	Alarm	Action ID	Ins
	*T	"	"	"	Default	SCRIPT	
	TT	"	"	"	Default	TROUBLE	
*							

Post Processing

	Event	Zone	Action ID
*			

Test

Before rolling out any Virtual Operator Action Patterns, always test its functionality. To do this:

- Load your test customer with the programming line added.
- Track the customer record to you. (Tracking is found under the Operations Menu)
- Load the alarm queue. (The alarm will be tracked to you but will be processed by the Virtual Operator)
- Send in a manual signal that matches the signal on that line in the customer's Event Actions Programming.
(Ultimately, the best way to test is to send a FEP manual signal so it processes as it would with all the translations in place)

Confirm the following:

- Does the alarm disappear after a few seconds?
- When you load the Customer Activity does the Event Show {AutoClient} in the USER ID field?
- Did the email arrive to the correct email address on the Customer?
- Is the script, within the email, what you created?

Troubleshooting

Here are some things to check when things go awry. If the alarm did not disappear in a few seconds from the alarm queue – pull down that alarm to your workstation and look for the action pattern it has.

- Is the action pattern incorrect?
 - If Yes – look at the event code and verify it is the event code where you added the action pattern.
 - If the line is correct, look to see if there is a more specific action pattern that is overtaking it. Look on the Customer, Transmitter Type, and Event Codes.
 - If it is incorrect, correct it.
 - If the Action Pattern is not correct – Check the Event Code and trace the Action pattern.
- Did the AutoClient even attempt to process the alarm?
 - If Yes, there is probably no email address in the customer details form for it to send an email. Or, there is a failure of the outgoing email. Look for error messages.
 - If No, most often this is caused by there being a Comment that has Show on Alarm and the option of Operator Must See Alarm enabled. This stops the Virtual Operator for even attempting to process the alarm.
 - If the email didn't make it to the expected address, you would want to confirm that the email address is good, that the publisher is running on Manitou and if the email received a denial.
 - If the wrong script ran, check the action pattern.

Review

What is the Virtual Operator?

This guide covered the following topics:

- It is important to prepare and seek the simplest and smartest solution to meet the customer need.
- How to create a Script Message within the Supervisor Workstation
- How to create an Action Pattern. (Remember, you can create these at the Customer, Dealer, and Monitoring Company level)
- How to tie the Action Pattern to an Event. (These can be linked on the Customer, Dealer, and Transmitter type records in the Operator workstation and within the Event Codes in the Supervisor Workstation)
- That it is VERY important to test the solution we create to be sure it meets up with the customer need.
- What to check when things don't work out as planned.

Building Virtual Operator Action Patterns can be used in many different ways on many different levels. It is always vital to keep an eye on your procedures before building these solutions.

Your Ideas

Now that you have a basic understanding of Virtual Operator Action Patterns. Take a few moments to jot down your thoughts on where you can use them in your operations.