



# **Operator Workstation User Guide**

## **Manitou CS**

### **2.0.0**

# Manitou CS Operator Workstation User Guide

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# Getting Started

The Manitou software makes handling alarms and managing accounts a simple, efficient task. For most functions, the Operator will work from the Manitou main interface screen. Whether the primary function is to handle alarms or process data entry, it is best to begin by becoming familiar with the Manitou application.

## Logging onto Manitou

Manitou makes logging on a simple, two-step process.

### Launch the Software

There are two ways to launch the Manitou software:

- Double-click the Operator (Manitou) Workstation icon on your desktop



- Start Menu → Programs → Bold Technologies → Manitou Workstation

If you experience trouble logging on, please contact a Supervisor.

### Log On

At the sign-on screen, enter your user name and password, and then click "**Enter**". The main Manitou screen now displays.

## Keyboard Shortcuts

Manitou offers a wide variety of keyboard shortcuts including: standard shortcuts, alarm processing shortcuts, and shortcuts that simplify navigation of the Customer record.

### Standard Shortcuts

Standard application shortcuts can be used anywhere in the OWS.

**Note:** when referring to shortcuts, please keep in mind that the "+" (plus sign) separates out different keys. Therefore, Ctrl + F4 refers to two different keys pressed at the same time: Ctrl and the F4 function key.

## CTRL Key Shortcuts

**Ctrl + E** - Edits the current form

**Ctrl + P** - Prints the current screen

**Ctrl + S** - Saves the form currently in Edit Mode

**Ctrl + F4** - Closes the active form

**Ctrl + D** - Begins the deletion process of the current record

**Ctrl + Shift + F4** - Closes all active forms

**Ctrl + Q** - Toggles between the active forms within Manitou. \*This works like Alt+Tab in Windows.

[Ctrl + L](#) - Customer Quick Load

## Function Key Shortcuts

Functions keys are located at the top of the keyboard and all begin with "F", such as F1, F2, etc...

**F1 - Help.** Opens the context-based Help file.

**F7 - Instant Messenger.** Launches the Instant Messenger feature within Manitou.

**F2 - Navigator Pane/Navigation Tab.** Activates Navigation Pane, highlighting the first record or form available.

F8 - not used

**F3 - Notes.** Brings up the Notes form on the Navigator Pane.

**F9 - [Pre-Cancel](#).** This launches the pre-cancel form.

**F4 - Manual Signal.** Used to generate manual alarms within the system.

**F10 - Dealer record.** Brings up the Dealer record; from within a Customer Record, using F10 will pre-load customer's data into the Dealer record.

**F5 - Send Manual Signal or Reload Form.**

**F11 - Mode Keys.** Jumps to the action buttons located at the top of a record: View, New, Edit, Action, etc.

**F6 - On Test.** This will load the On Test form; from within a Customer Record, using F6 will pre-load that customer's data into the On Test form.

**F12 - Jump To Menu.** Activates the Jump To Menu within a record.

## Alarm Processing Shortcuts

Certain shortcuts and quick-keys pertain only to processing alarms. These shortcuts are typically one letter or a series of letters typed together.

Quick-keys typically refer to a letter within the action or task item. Once a quick-key is pressed, the software underlines all quick-keys in the software for easy reference.

For example, typing "A" for Actions will not only reveal the drop-down menu, but also underline all quick-key letters within the associated tasks.

**D - Do**

## A - Actions Menu

**AA** - Actions/Action. Reinitiates the selected completed action; i.e. redials an already contacted action.

**AI** - Actions/Ignore. Ignores the selected Action Pattern item.

**AC** - Actions/Call-in. Assumes selected Action Pattern item contact is calling in with the reference to this alarm.

**AL** - Actions/View all Contacts. Alternate method to view all associated contacts for an alarm (**View All Contacts** radio button is located directly above the *Action Pattern* window).

**AW** - Actions/View all Call Lists. This is just like clicking the View All Call Lists radio button on the interface.

**AP** - Actions/Validate Password. Validates passwords related to the alarm account.

**AO** or **P** - Actions/Action Pattern or Action Pattern. Loads and brings focus to the Action Pattern.

**AM** - Actions/Add Comment. Adds a comment to the loaded alarm activity.

**AT** - Actions/Add Temporary Comment. Loads the Comments form for the customer on the alarm.

**AS** - Actions/Add Temporary Schedule. Loads the Schedule form for the customer on the alarm.

**AR** - Actions/Reverse. This executes applicable Reverse commands.

**AF** - Actions/Confirm Alarm. Verifies event is a true alarm.

**AN** - Actions/Audio Commands. Takes the user to Audio specific items.

**AV** - Actions/View Customer. Loads the customer listed on the alarm.

**AE** - Actions/Edit Customer. Loads the customer listed on the alarm and places it into edit mode through password validation.

**AH** - Actions/Handling Notifications. View and acknowledge Ribbon warnings.

**AHN** - Actions/Handling Notifications/New Alarm/Signal for Customer.

**AHH** - Actions/Handling Notifications/Higher Priority Alarm.

**AHP** - Actions/Handling Notifications/Pre-Cancel. Notifies of a Pre-cancel item for this Alarm account.

**AHD** - Actions/Handling Notifications/Concurrent Alarm Handlers. Notifies the Operator that others are working the same account.

**AHU** - Actions/Handling Notifications/UL Account.

**AHL** - Actions/Handling Notifications/Contact List Comments. Displays comments tied to that record.

**AHG** - Actions/Handling Notifications/Group/Class Codes. Displays the class code details, if Alert User is enabled.

**AHA** - Actions/Handling Notifications/Alarm Suspension Expired.

**AHM** - Actions/Handling Notifications/Maintenance Issues.

**AHE** - Actions/Handling Notifications/Media Clip Available. Could contain video or audio.

**AHV** - Actions/Handling Notifications/Map Location Available.

**AHC** - Actions/Handling Notifications/Call Session. Notification of call that links to the loaded alarm.

**AHS** - Actions/Handling Notifications/Call Session Adopted.

**AHR** - Actions/Handling Notifications/PSAP Authority.



## O - Operations Menu

**OO** – Operations/On Test.

**OP** – Operations/Paged Contacts. Loads the list of accounts recently contacted through pager or messages left.

**OC** – Operations/Pre-Cancel. Loads the Pre-Cancel form.

**OR** – Operations/Review Pre-Cancel. Loads the Pre-Cancel record pertaining to the loaded alarm.

**OT** – Operations/Tracking.

**OA** – Operations/Alarm Handling Options. Loads the Alarm Handling options form for enabling/disabling Auto-get.

**OH** – Operations/Pause Alarm Handling.

## H - Hold Menu

**HD** – Hold/Defer. Throws the alarm back into the alarm queue.

**HS** – Hold/Suspend. Places the alarm event on hold for a prescribed period of time.

**HA** – Hold/Defer to Auto-Client. Gives the alarm to the Auto-Client for completion of non-human interaction required Action Pattern items. (Emails, Pages, Faxes, and so on)

## F - Finish Menu

**FS** – Finish/Close. Closes the alarm if all Action Pattern commands are satisfied.

**FO** – Finish/Operator Cancel. Requires data entry of Operator's password to close the alarm.

**FC** – Finish/Customer Cancel. Requires a customer password to close the alarm.

# Record Overviews

The Manitou application is comprised of a variety of forms that work together to provide complete information about accounts and alarms. The forms change depending on which record you are viewing (ie., Customer, Dealer, Authority, etc.). Each record type contains different forms, accessible through the Jump To menu located on the right-hand side of the screen.

## Customer Record Overview

The Customer record contains all pertinent information regarding the Customer account. This information is automatically pulled into the Alarm Handling form at the time an alarm presents to Manitou.

Load a Customer record from the main screen by navigating to the "Maintenance" menu, and clicking "Customer". Then, enter the Customer ID, or click the Lookup icon (magnifying glass) and enter search parameters. If you are in the Alarm Handling form, enter "A" and then "V" on your keyboard.

## Customer Record Forms

Navigating the Customer Record is managed through the Jump To menu located on the right-hand side of your screen.

### Customer

The Customer form contains basic account information including:

- Customer ID
- Account Name
- Account Type/Relationship Type
- Address
- Country/Language/Time zone
- Accounting Details
- Account Status
- Monitoring Status

### Details

The Details form contains property-specific information including:

- Telephone Numbers
- Dealer
- Branch
- Authorities (Police/Fire/Medical)

### Options

The Options form contains Customer-specific options including:

- Passwords (including Duress)
- Group/Class Codes
- Monitoring Group
- UL Grade\*
- Default Script Message\*\*
- Specific Options - detailed below

## Specific Options

- Ignore Aborts – Disregard canceling signals
- Auto Cancel – Allow the ability to auto cancel specifically programmed items
- Generate Unexpected Restores – If only a restore event arrives, generate as an alarm
- Verify Panel User No. – Check the Contact List for a person matching the user number presented with event
- Area Fill – Automatically add any Areas not already programmed to the account data
- Zone Fill – Automatically add Zones not already programmed to the account data (not often used in the US)
- Time Format – Change reports from 24 Hour time to 12 Hour time; service offering to those customers that have issues reading 24 Hour time

**Note:** \*UL Grade – when applicable, the “UL Grade” and “Time out” determines that the account should receive UL handling and time measurements. \*\*Default Script Message – Often created on a more global basis. Generates automatically pre-filled details based on parameters selected that may be used for email/text/fax notifications.

## Systems

**Note:** red boxes indicate the ability to copy formatted or unformatted text into the field. Double-click the red box to open the dialog box to select a copy option.

Systems are known as the “heart” of the account. This form contains the Transmitter form, which is how signals find this record. The Systems form contains:

- **System** – including Panel type information, when applicable.
- **Transmitter** – how signals find this customer account.
- **Programming** – Signal Translations
- **Areas** – Partitions of a
- **Zones** – Physical locations
- **Devices** – Items connecting to the system, such as cameras.
- **Users** – A listing of persons on the Contact List with User Numbers
- **Reminders** – The ability to create events based on a schedule or date/time to generate customer specific

panel/account

alarms.

## Services

The Services form displays services tied to the account.

## O/C Schedules

The Open/Close schedules form contains the details of when users may open/close the property. The schedule contains four tabs:

Thu	08:00	Must Open
Thu	17:00	May Close
Thu	19:00	Must Close
Fri	07:00	May Open
Fri	08:00	Must Open
Fri	17:00	May Close
Fri	19:00	Must Close

Permanent Schedule | Alternate Schedule | Holidays | Temporary

Customer Record O/C Schedules

- **Permanent** – the normal, regular schedule
- **Alternate** – a temporary schedule for a period greater than 24 hours
- **Holiday** – a specific date that takes precedent over a Permanent and Alternate schedule
- **Temporary** – a single day schedule override

**Note:** schedule hierarchy works from left to right. 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.

## Contact List

The Contact List contains all persons and entities that have access to the property. Not everyone may be contacted in the event of an alarm. However, if a person has any sort of access to the property he must be listed in the Contact List.

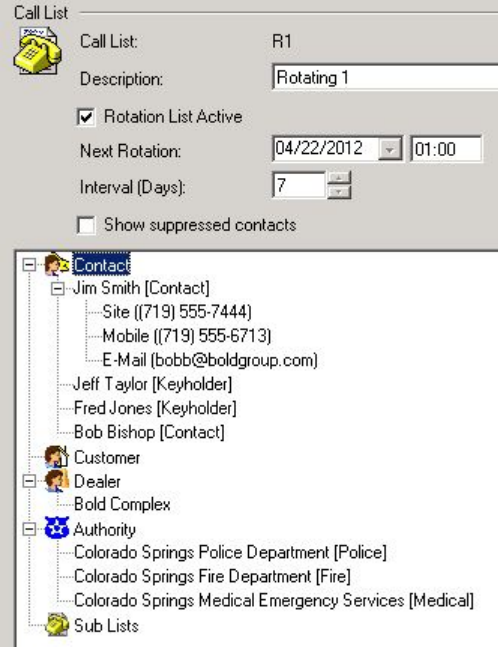
This allows for tracking in the event that someone wrongfully accesses the property.

Contact	Jim Smith
	Jeff Taylor
	Fred Jones
	Bob Bishop [BOBB]
Customer	Bold Towers [1003]
Dealer	Bold Complex [BOLD]
Agency	
Authority	Colorado Springs Police
	Colorado Springs Fire D
	Colorado Springs Medic

Customer Record Contact List

## Call Lists

Call lists may or may not be included on a Customer record. Most often, they are used to rotate those persons contacted in the event of an alarm or to set differing contacts based on the day of the week or time of the day.



Customer Record Call List

## Attentions

The Attentions form lists who receives reports or mailing items.

## Permits

The Permits form contains any applicable permits needed for Authority reference.

## Comments

The Comments form contains all notes relating to the account record. There are three types of comments related to Customer records:

- **Temporary** – comments that expire after a specified period of time.
- **Standing** – facts about the site, such as: large dogs, gun collector, etc.
- **Special Instructions** – linked comments (ie., comments that are true for more than one account). These are created and linked via the [Monitoring Company record](#).

## Action Patterns

The Action Patterns form includes Customer, Dealer, and Monitoring Company details, and step-by-step instructions for handling alarms. You can construct Enhanced Action Patterns using logic statements like “if,” “then,” and “else.” Other programming constructs like loops

and variables are also available. Once initiated, Enhanced Action Patterns look at history, run SQL statements, and execute external programs. For information on using an Action Pattern, see [Alarm Tab, Action Patterns](#).

## Plans

The Plans form contains schematics of a property, including the location of zone points, cameras and/or other devices.

## Reverse Command

Reverse Commands are command strings you can use to send commands to devices. While they can be created, they are more commonly preloaded into the Manitou system. You can also specify when a Reverse Command should apply (for e.g., in all circumstances or only when an alarm arrives). Reverse Commands are typically defined at Monitoring Company level and then applied to a Customer.

Field Type	Data Type	Label	Range	DB Value	Default	Format
Database	Integer	Hardware ID	1-65535	Device ID		

Reverse Command form

## User Defined

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

## Reports


The Reports form displays any reports scheduled to run on a scheduled basis for the customer record. Most often, [Customer Activity](#) reports list here.

## On Test Status

The On Test Status form displays the status of any [On Test](#) records directly related to this

single customer record.

## Zone Status

The Zone Status form displays the status of any currently unrestored events, such as: Late to Test. This is a view-only screen and can be refreshed by clicking the refresh button. 

## Reverse Send

Send available reverse command signals along configured channels, select **Transmitter** and **Route** or choose to override from the Reverse Send form. For more information on configuring channels, see the [Reverse Commands](#) section.

## Maintenance Issues

The Maintenance Issues form displays and allows the creation of Maintenance items relating to the customer record. See [Creating a New Maintenance Issue](#) for steps to create a Maintenance Issue.

## Activity Log

View

New

Edit

Delete

Save

Cancel

Customer Activity Log

More

Comment

Resolution Code

Date	Time	Log Description	User ID
04/18/2012	10:48:46	Customer View	BOLD
04/18/2012	08:22:11	Customer View	BOLD
04/17/2012	13:18:59	Customer View	BOLD
04/03/2012	13:24:10	Customer View	BOLD
03/30/2012	19:00:01	Late To Close (LC) (System: 1 Area: 2) Key: LC OA: 2 Dup-Event	
03/30/2012	19:00:01	Late To Close (LC) (System: 1 Area: 1) Key: LC OA: 1 Dup-Event	
03/29/2012	19:00:03	Late To Close (LC) (System: 1 Area: 2) Key: LC OA: 2 Dup-Event	
03/29/2012	19:00:03	Late To Close (LC) (System: 1 Area: 1) Key: LC OA: 1 Dup-Event	
03/29/2012	12:20:17	Customer View	BOLD
03/28/2012	19:00:02	Late To Close (LC) (System: 1 Area: 2) Key: LC OA: 2 Dup-Event	
03/28/2012	19:00:02	Late To Close (LC) (System: 1 Area: 1) Key: LC OA: 1 Dup-Event	
03/27/2012	19:00:02	Late To Close (LC) (System: 1 Area: 2) Key: LC OA: 2 Dup-Event	
03/27/2012	19:00:01	Late To Close (LC) (System: 1 Area: 1) Key: LC OA: 1 Dup-Event	
03/26/2012	19:00:00	Late To Close (LC) (System: 1 Area: 2) Key: LC OA: 2 Dup-Event	
03/26/2012	19:00:00	Late To Close (LC) (System: 1 Area: 1) Key: LC OA: 1 Dup-Event	
03/23/2012	19:00:01	Late To Close (LC) (System: 1 Area: 2) Key: LC OA: 2 Dup-Event	
03/23/2012	19:00:00	Late To Close (LC) (System: 1 Area: 1) Key: LC OA: 1 Dup-Event	
03/23/2012	14:32:13	Customer View	BOLD
03/22/2012	19:00:03	Late To Close (LC) (System: 1 Area: 2) Key: LC OA: 2 Dup-Event	
03/22/2012	19:00:03	Late To Close (LC) (System: 1 Area: 1) Key: LC OA: 1 Dup-Event	
03/21/2012	19:00:01	Late To Close (LC) (System: 1 Area: 2) Key: LC OA: 2 Dup-Event	
03/21/2012	19:00:01	Late To Close (LC) (System: 1 Area: 1) Key: LC OA: 1 Dup-Event	
03/20/2012	19:00:00	Late To Close (LC) (System: 1 Area: 2) Key: LC OA: 2 Dup-Event	
03/20/2012	19:00:00	Late To Close (LC) (System: 1 Area: 1) (Alarm) Key: LC OA: 1	BOLD
03/27/2012	14:29:26	Viewed - Response [163:29:26]	BOLD

Logs

Filter

Jump To

Customer

Details

Options

Systems

Services

O/C Schedules

Contact List

Call Lists

Attentions

Permits

Comments

Action Patterns

Workflow Compon

Workflow

General Schedules

Plans

Reverse Command

User Defined

Reports

On Test Status

Zone Status

Reverse Send

Maintenance Issue

Activity Log

Access Control

Customer Activity Log

The customer Activity Log houses all actions taken on the customer record. This includes:

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

When reading the *Customer Activity Log*, the most recent activity is always located at the top of the record, in chronological order. The details of actions taken on a specific event read from top to bottom immediately following the event.

### Filtering the Activity Log



The Alarm Queue filters by **the last 30 days of activity** within a customer record; however the Activity Log can be filtered by an array of options.

**Activity Log Filter**

1. Click the **Filter** tab located at the bottom of the *Customer Activity Log* form.
2. Select the filter parameters. Parameters may include:
  - Date Range
  - Time period
  - Log Record Types
  - Associated Objects
  - Event Types and Categories
  - Other account specific items
  - Display Format
    - Standard View – details all features of the activity including header, signal breakdown and details
    - Report Normal – shows only the event name, zone description and date/time of the event
    - Report Detail – contains most of the data housed within the Standard View with the exception of the header descriptions

*The Display Format may also be set by right-clicking within the Log and selecting view preference.*
3. Click the **Search** button.
4. To remove the filter, return to the *Filter* Tab, click the **Clear** button then **Search**.



## Additional Records


While the Customer Record is the primary type as it pertains directly to alarm handling and monitoring, there are several other types of records that can be created and maintained within the Manitou system. These records include:

- [Dealer](#)
- [Authority](#)
- [Agency](#)
- [Branch](#)
- [Monitoring Company](#)
- [Global Keyholder](#)

## Dealer Record

Dealers are independent entities that typically handle customer installations of alarm and monitoring equipment. The Dealer record contains all the information associated with a Dealer on record.

To search for a Dealer, load the *Dealer* form from either the **Maintenance** pull-down menu or **File** pull-down menu → **Open** → **Dealer**.

 *As with Customers, there is no limit to the amount of Dealer records that can be stored within the Manitou system.*

➤ For information on how to enter customer-related data, see [Dealer](#).

Much like the *Customer Record*, navigation through the *Dealer Record* is managed through the Jump To menu located on the right-hand side.

## Dealer

The Dealer form contains basic information including:

- Dealer ID
- Country/Language/Time zone
- Account Name
- Accounting Details
- Account
- Monitoring Status

Type/Relationship Type

- Address

## Options

The Options form maintains dealer-specific options allowing for customer put on-test designation, third-party billing specifications, time format and email address for sending reports.

## Contact List

The Contact List contains all persons and entities that have access to the property. Not everyone may be contacted in the event of an alarm; however, if a person has any sort of access to the property they should 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.*

Dealer Contact List

## Call Lists

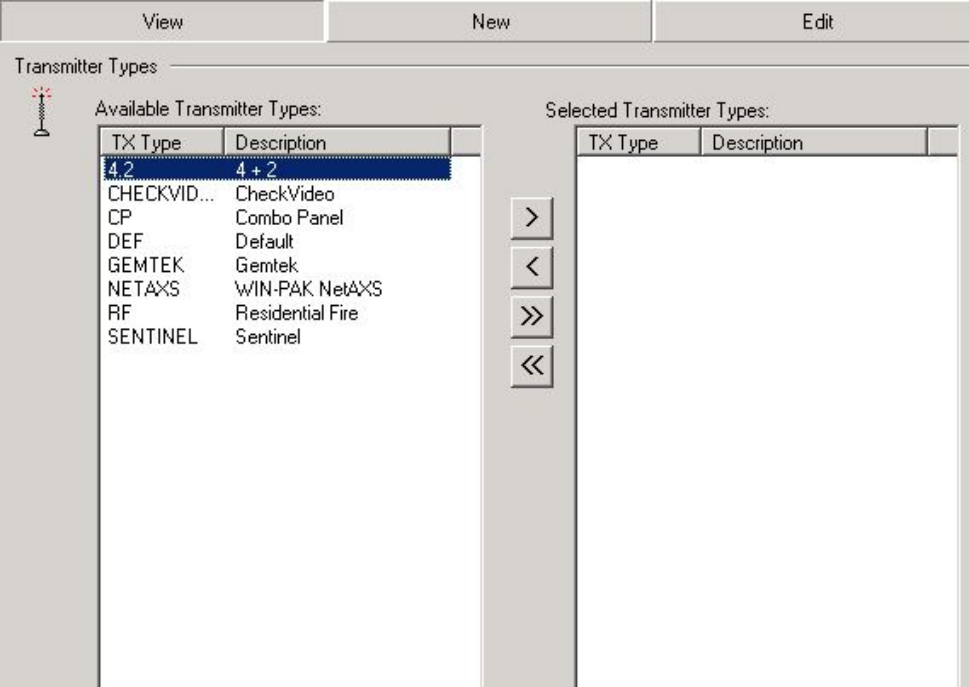
Call lists may or may not be utilized on a Dealer record. Most often, they are used to rotate those persons contacted in the event of an alarm or to set differing contacts based on the day of the week or time of the day.

## Attentions

The Attentions form lists who receives reports or mailing items.

## TX Types

TX Types allows for the designation of a specific set of transmitter types being used by the Dealer. This is useful when dealing with a large entity using numerous types of transmitters.



The screenshot shows the 'TX Types' form with three tabs: 'View', 'New', and 'Edit'. The 'View' tab is active. The form is divided into two main sections: 'Available Transmitter Types' on the left and 'Selected Transmitter Types' on the right. Between these sections are four buttons: '>', '<', '>>', and '<<'. The 'Available Transmitter Types' section contains a table with the following data:

TX Type	Description
4 2	4 + 2
CHECKVID...	CheckVideo
CP	Combo Panel
DEF	Default
GEMTEK	Gemtek
NETAXS	WIN-PAK NetAXS
RF	Residential Fire
SENTINEL	Sentinel

The 'Selected Transmitter Types' section is currently empty.

TX Types form

## TX ID Ranges

TX ID Ranges form is used to specify a particular range of transmitter IDs that has been given to a Dealer; blocks of transmitters IDs can be assigned to different Dealers using the same [Receiver Line Prefix](#).

## Programming

Event programming can be changed at the Dealer level to specify how particular types of alarms are handled, whether detailed in a report, sent to an email, etc.

## Comments

The Comments form contains all notes relating to the account record. There are three types of comments related to customer records:

- **Temporary** – comments that expire after a specified period of time.
- **Standing** – facts about the site, such as: large dogs, gun collector, etc.
- **Special Instructions** – “linked” comments. Comments that are true on greater than one account. These are created and linked through the [Monitoring Company record](#).

## Action Patterns

The Action Patterns form displays the customer, dealer, company and step-by-step instructions for handling alarms. You can construct Enhanced Action Patterns using logic statements like “if,” “then,” and “else.” Other programming constructs like loops and variables are also available. Once initiated, Enhanced Action Patterns look at history, run SQL statements, and execute external programs. For information on using an Action Pattern, see [Alarm Tab, Action Patterns](#).

## Billing Charges & Billing Rates

This information is for accounting purposes. For more about billing, see a Supervisor or Manager for the facility.

## General Schedules

The General Schedules form displays any days/times where specific items are changed or disregarded.

## Control Panels

Much like Transmitter IDs, particular control panels can be selected within this section to narrow a list down for a specific Dealer.

## Reverse Protocols

Reverse Protocols allow Manitou to communicate back to the device. These protocols are specific to device and manufacturer.

## Reverse Command

Reverse Commands are command strings that allow the designation of channels and configuration for sending reverse commands to devices. While these can be created, Reverse Commands are most commonly pre-loaded in to the Manitou system. Availability of the command may also be specified, whether used in specific instances or only when an alarm is generated.

The screenshot shows the 'Reverse Command form' with the following details:

- View:** Add, Remove
- Reverse Channel Command:**
  - Type: Honeywell WIN-PAK
  - Group: Door (Output)
  - Command: WEGZ
  - Description: Energize
  - User Group: Operator
  - Response Type: Delayed
  - Response Delay: 30
  - Command Level: Customer
  - Command Detail: None
- Availability:**
  - ☐ Alarm Only
  - ☐ Dealer User Allowed
  - ☐ Customer User Allowed
  - ☐ Restricted
  - ☐ VRT User Allowed
  - ☐ Web User Allowed
  - ☐ Disabled
- Attributes:**
  - ☐ Connect Command
  - ☐ Disconnect Command
  - ☐ Request Binary Data
  - ☐ Retransmission
  - ☐ Transmitter Connection Required
- Optional Parameters:**

Field Type	Data Type	Label	Range	DB Value	Default	Format
Database	Integer	Hardware ID	1-65535	Device ID		

Reverse Command form

Reverse Commands are typically defined at Monitoring Company level and then applied to a Customer.

## Reports

The Reports form displays any reports to run on a scheduled basis for the customer record. Most often, [Customer Activity](#) reports list here.

## Maintenance Issues

The Maintenance Issues form displays and allows the creation of Maintenance items relating to the customer record. See [Creating a New Maintenance Issue](#) for steps to create a Maintenance Issue.

## Statistics

The Statistics area of a Dealer account shows specific counts for customers, customer status, and customer transmitter data. The time may be set to 24, 48, or 72-hour inquiries and **Sub-Dealer** statistics may be included or removed from the compiled Statistics.

## Authority Record

Authorities are any emergency response agencies such as Police, Fire, Ambulance, etc. The Authority record contains all the information associated with an Authority on record.

As with Customers, there is no limit to the amount of Authorities that can be stored within the Manitou system.

➤ For information on how to enter customer-related data, see [Authority](#).  
Much like the *Customer Record*, navigation through the *Authority Record* is managed through the Jump To menu located on the right-hand side.

## Authority

The Authority form contains basic information including:

- Authority ID
- Location & Contact Information
- Account Name
- E-mail and Website Information
- Account/Relationship Type


## Options

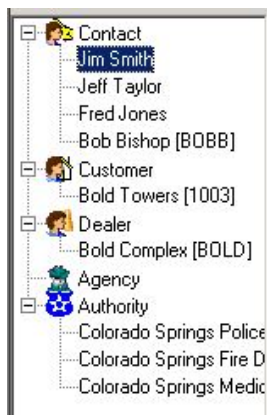
The Options form maintains authority-specific options including:

- Permit designation
- Dispatch Charges
- False Alarm Tracking options

## Contact List

The Contact List contains all persons and entities that have access to the property. Not everyone may be contacted in the event of an alarm; however, if a person has any sort of access to the property they should 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.*



Contact List

## Call Lists

Call lists may or may not be utilized on a customer record. Most often, they are used to rotate those persons contacted in the event of an alarm or to set differing contacts based on the day of the week or time of the day.



Call List

## Attentions

The Attentions form lists who receives reports or mailing items.

## Comments

The Comments form contains all notes relating to the record. There are three types of comments related to Authority records:

- **Temporary** – comments that expire after a specified period of time.
- **Standing** – facts about the site, such as: large dogs, gun collector, etc.
- **Special Instructions** – “linked” comments. Comments that are true on greater than one account. These are created and linked through the Monitoring Company record.

## General Schedules


The General Schedules form displays any days/times where specific items are changed or disregarded.

## Maintenance Issues

The Maintenance Issues form displays and allows the creation of Maintenance items relating to the customer record. See [Creating a New Maintenance Issue](#) for steps to create a Maintenance Issue.

## Agency Record

The Agency record contains all the information associated with an Agency on record.

 *As with Customers, there is no limit to the amount of Agency records that can be stored within the Manitou system.*

➤ For information on how to enter customer-related data, see [Agency](#).



**Agency Record**

Much like the *Customer Record*, navigation through the *Agency Record* is managed through the Jump To menu located on the right-hand side.

## Agency

The *Agency* form contains basic information including:

- Agency ID
- Account Name
- Account/Relationship Type
- Location & Contact Information
- Accounting Details
- E-mail and Website Information

## Options



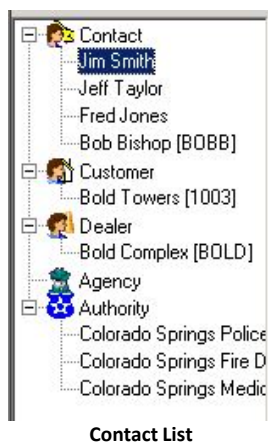
The Options form maintains agency-specific options including:

- Agency Verification
- Dispatch Charges

## Contact List

The Contact List contains all persons and entities that have access to the property. Not everyone may be contacted in the event of an alarm; however, if a person has any sort of access to the property they should 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.*



Contact List

## Call Lists

Call lists may or may not be utilized on a customer record. Most often, they are used to rotate those persons contacted in the event of an alarm or to set differing contacts based on the day of the week or time of the day.

Call List

Call List: R1

Description: Rotating 1

☒ Rotation List Active

Next Rotation: 04/22/2012 01:00

Interval (Days): 7

☐ Show suppressed contacts

- [-] Contact
  - [-] Jim Smith [Contact]
    - Site ((719) 555-7444)
    - Mobile ((719) 555-6713)
    - E-Mail (bobb@boldgroup.com)
  - Jeff Taylor [Keyholder]
  - Fred Jones [Keyholder]
  - Bob Bishop [Contact]
- Customer
- [-] Dealer
- Bold Complex
- [-] Authority
  - Colorado Springs Police Department [Police]
  - Colorado Springs Fire Department [Fire]
  - Colorado Springs Medical Emergency Services [Medical]
- Sub Lists

Call List

## Attentions

The Attentions form lists who receives reports or mailing items.

## Comments

The Comments form contains all notes relating to the account record. There are three types of comments related to customer records:

- **Temporary** – comments that expire after a specified period of time.
- **Standing** – facts about the site, such as: large dogs, gun collector, etc.
- **Special Instructions** – “linked” comments. Comments that are true on greater than one account. These are created and linked through the Monitoring Company record.

## General Schedules

The General Schedules form displays any days/times where specific items are changed or disregarded.


## Maintenance Issues

The Maintenance Issues form displays and allows the creation of Maintenance items relating to the customer record. See [Creating a New Maintenance Issue](#) for steps to create

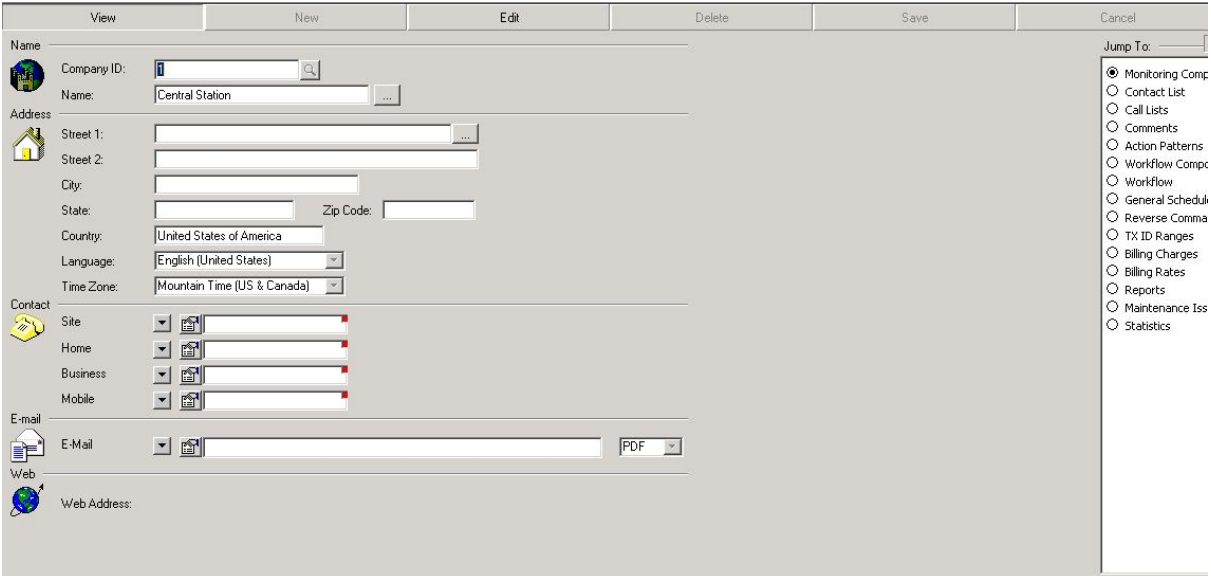
a Maintenance Issue.

## Monitoring Company Record

The Monitoring Company record contains all the information associated with a Monitoring Company on record.

 *As with Customers, there is no limit to the amount of Dealer records that can be stored within the Manitou system.*

➤ For information on how to enter customer-related data, see [Monitoring Company](#).



The screenshot shows the 'Monitoring Company Record' form. At the top are tabs: View, New, Edit, Delete, Save, and Cancel. The form is divided into several sections with icons: 'Name' (Company ID, Name), 'Address' (Street 1, Street 2, City, State, Zip Code, Country, Language, Time Zone), 'Contact' (Site, Home, Business, Mobile), 'E-mail' (E-Mail), and 'Web' (Web Address). On the right side, there is a 'Jump To:' menu with a list of record types: Monitoring Comp (selected), Contact List, Call Lists, Comments, Action Patterns, Workflow Comp, Workflow, General Scheduling, Reverse Comma, TX ID Ranges, Billing Charges, Billing Rates, Reports, Maintenance Iss, and Statistics.

Monitoring Company Record

Much like the *Customer Record*, navigation through the *Monitoring Company Record* is managed through the Jump To menu located on the right-hand side.

## Monitoring Company

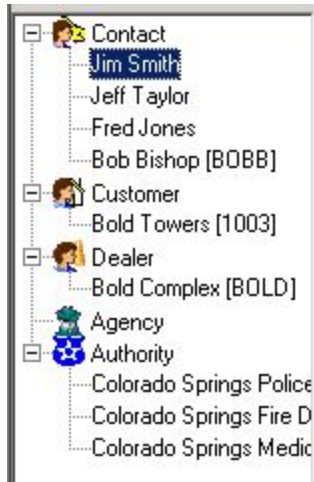
The *Monitoring Company* form contains basic information including:

- Company ID
- Account Name
- Account/Relationship Type
- Location & Contact Information
- Accounting Details
- Account Status
- Monitoring Status

## Contact List

The Contact List contains all persons and entities that have access to the property. Not everyone may be contacted in the event of an alarm; however, if a person has any sort of access to the property they should 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.*



Customer Record Contact List

## Call Lists

Call lists may or may not be utilized on a customer record. Most often, they are used to rotate those persons contacted in the event of an alarm or to set differing contacts based on the day of the week or time of the day.

Call List

Call List: R1

Description: Rotating 1

☒ Rotation List Active

Next Rotation: 04/22/2012 01:00

Interval (Days): 7

☐ Show suppressed contacts

Contact

- Jim Smith [Contact]
  - Site ((719) 555-7444)
  - Mobile ((719) 555-6713)
  - E-Mail (bobb@boldgroup.com)
- Jeff Taylor [Keyholder]
- Fred Jones [Keyholder]
- Bob Bishop [Contact]
- Customer
  - Dealer
    - Bold Complex
- Authority
  - Colorado Springs Police Department [Police]
  - Colorado Springs Fire Department [Fire]
  - Colorado Springs Medical Emergency Services [Medical]
- Sub Lists

Customer Record Call List

## Comments

The Comments form contains all notes relating to the account record. There are three types of comments related to customer records:

- **Temporary** – comments that expire after a specified period of time.
- **Standing** – facts about the site, such as: large dogs, gun collector, etc.
- **Special Instructions** – “linked” comments. Comments that are true on greater than one account. These are created and linked through the [Monitoring Company record](#).

## Action Patterns

The Action Patterns form displays the customer, dealer, company and step-by-step instructions for handling alarms. You can construct Enhanced Action Patterns using logic statements like “if,” “then,” and “else.” Other programming constructs like loops and variables are also available. Once initiated, Enhanced Action Patterns look at history, run SQL statements, and execute external programs. For information on using an Action Pattern, see [Alarm Tab, Action Patterns](#).

## General Schedules

The General Schedules form displays any days/times where specific items are changed or disregarded.

## Reverse Command

Reverse Commands are command strings that allow the designation of channels and configuration for sending reverse commands to devices. While these can be created, Reverse Commands are most commonly pre-loaded in to the Manitou system. Availability of the command may also be specified, whether used in specific instances or only when an alarm is generated.

Field Type	Data Type	Label	Range	DB Value	Default	Format
Database	Integer	Hardware ID	1-65535	Device ID		

Reverse Command form

Reverse Commands are typically defined at Monitoring Company level and then applied to a Customer.

## TX ID Ranges

TX ID Ranges form is used to specify a particular range of transmitter IDs that has been given to a Dealer; blocks of transmitters IDs can be assigned to different Dealers using the same Receiver Line Prefix.

## Billing Charges & Billing Rates

This information is for accounting purposes. For more about billing, see a Supervisor or Manager for the facility.

## Reports

The Reports form displays any reports to run on a scheduled basis for the customer record. Most often, [Customer Activity](#) reports list here.

## Maintenance Issues


The Maintenance Issues form displays and allows the creation of Maintenance items relating to the customer record. See [Creating a New Maintenance Issue](#) for steps to create a Maintenance Issue.

## Statistics

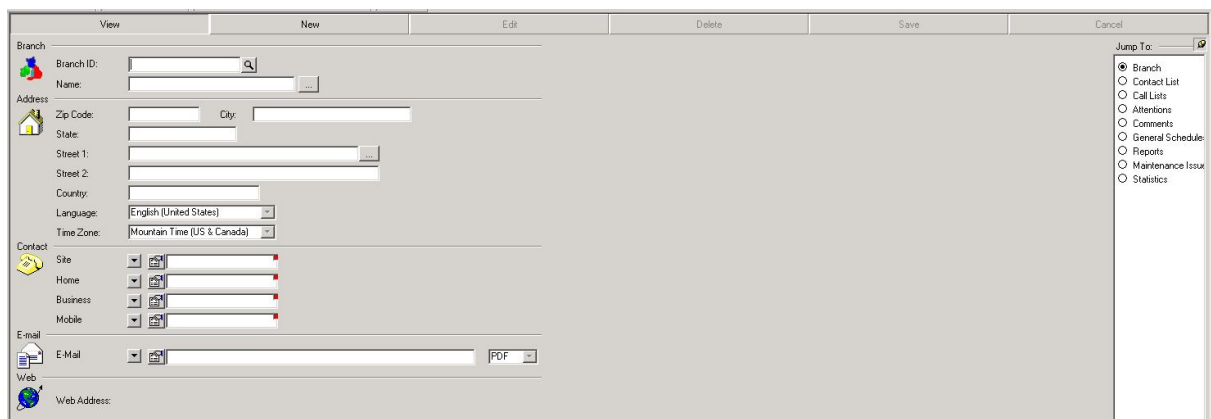
The Statistics area of a Dealer account shows specific counts for customers, customer status, and customer transmitter data. The time may be set to 24, 48, or 72-hour inquiries and **Sub-Dealer** statistics may be included or removed from the compiled Statistics.

## Branch Record

Branches are sub-offices of a main customer location. The Branch record contains all the information associated with a Branch on record.

 *As with Customers, there is no limit to the amount of Dealer records that can be stored within the Manitou system.*

➤ For information on how to enter customer-related data, see [Branch](#).



Much like the Customer Record, navigation through the Branch Record is managed through the Jump To menu located on the right-hand side.

## Branch

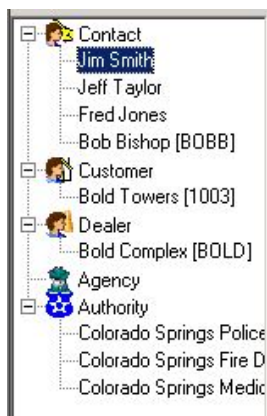
The Branch form contains basic information including:

- Branch ID
- Account Name
- Account/Relationship Type
- Location & Contact Information
- Accounting Details
- Account Status
- Monitoring Status

## Contact List

The Contact List contains all persons and entities that have access to the property. Not everyone may be contacted in the event of an alarm; however, if a person has any sort of access to the property they should 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.*



Contact List

## Call Lists

Call lists may or may not be utilized on a customer record. Most often, they are used to rotate those persons contacted in the event of an alarm or to set differing contacts based on the day of the week or time of the day.



Call List

Call List: R1

Description: Rotating 1

☒ Rotation List Active

Next Rotation: 04/22/2012 01:00

Interval (Days): 7

☐ Show suppressed contacts

Contact

- Jim Smith [Contact]
  - Site ((719) 555-7444)
  - Mobile ((719) 555-6713)
  - E-Mail (bobb@boldgroup.com)
- Jeff Taylor [Keyholder]
- Fred Jones [Keyholder]
- Bob Bishop [Contact]
- Customer
- Dealer
- Bold Complex
- Authority
  - Colorado Springs Police Department [Police]
  - Colorado Springs Fire Department [Fire]
  - Colorado Springs Medical Emergency Services [Medical]
- Sub Lists

Call List

## Attentions

The Attentions form lists who receives reports or mailing items.

## Comments

The Comments form contains all notes relating to the account record. There are three types of comments related to customer records:

- **Temporary** – comments that expire after a specified period of time.
- **Standing** – facts about the site, such as: large dogs, gun collector, etc.
- **Special Instructions** – “linked” comments. Comments that are true on greater than one account. These are created and linked through the Monitoring Company record.

## General Schedules

The General Schedules form displays any days/times where specific items are changed or disregarded.

## Reports

The Reports form displays any reports to run on a scheduled basis for the customer record. Most often, [Customer Activity](#) reports list here.

## Maintenance Issues

The Maintenance Issues form displays and allows the creation of Maintenance items relating to the customer record. See [Creating a New Maintenance Issue](#) for steps to create a Maintenance Issue.

## Statistics

The Statistics area of a Dealer account shows specific counts for customers, customer status, and customer transmitter data. The time may be set to 24, 48, or 72-hour inquiries and **Sub-Dealer** statistics may be included or removed from the compiled Statistics.

## Global Keyholder Record

Global Keyholders are primary contacts that can be connected to multiple Customer records. The Global Keyholder record contains all the information associated with a Global Keyholder on record.

*As with Customers, there is no limit to the amount of Dealer records that can be stored within the Manitou system.*

➤ For information on how to enter customer-related data, see [Global Keyholder](#).

Much like the Customer Record, navigation through the Global Keyholder Record is managed through the Jump To menu located on the right-hand side.

## Keyholder

The Keyholder form contains basic information including:

- Person (keyholder) ID
- Location & Contact Information

- Account Name
- Accounting Details
- Account/Relationship Type
- Account Status
- Monitoring Status

## General Schedules

The General Schedules form displays any days/times where specific items are changed or disregarded.


## Maintenance Issues

The Maintenance Issues form displays and allows the creation of Maintenance items relating to the customer record. See [Creating a New Maintenance Issue](#) for steps to create a Maintenance Issue.

# Alarm Handling

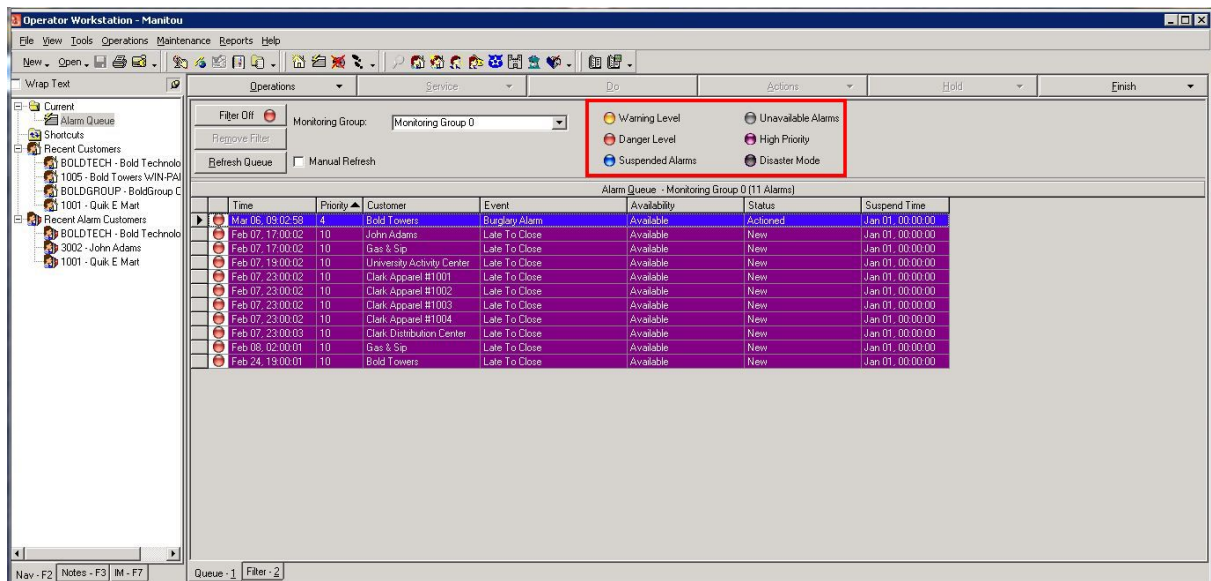
Alarm Handling is the core function of the Manitou system. An "alarm" in Manitou by definition is "an event that an Operator must interact with and process by taking specific action or verifying an event".

- To access the current alarms, select **Alarm Queue** from the **Operations** pull-down menu or click the **Alarm Queue** button from the Button Toolbar.
- To begin handling, or processing alarms, select **Alarm Handling** from the **Operations** pull-down menu or click the **Alarm Handling** button from the Button Toolbar.

 *There are many ways to access information and perform tasks within the Manitou system, from pull-down menus to application buttons to quick-key combinations. For a list of available standard and task-specific shortcuts, please see [Keyboard Shortcuts](#) in the Getting Started chapter.*

## Alarm Queue

The *Alarm Queue* allows an Operator to view and access alarms presenting to the Manitou system. Alarms in the queue are ordered with the "oldest and highest priority" alarm at the top and are color-coded to help determine the level of importance of each.




Alarm Queue, color codes

## Color Coding

As with the Status Bar, the Alarm Queue utilizes colors to help Operators quickly assess the status of alarms.

New alarms present to the alarm queue in one of two color styles:

- **White background with Black text** - Standard-priority alarms
- **Bright Pink background with White text** - High-priority alarms that should be located at the top of the queue. The color is specifically designed to draw attention to the event.

 *Colors and settings for the Alarm Queue can be configured to specification; the visuals referenced herein are an example of the default configuration for Manitou.*

Alarms also change colors within the alarm queue as they begin to age:

- **Yellow** - alarm has reached Warning level
- **Red** - alarm has reached Danger level and needs immediate attention

## Columns, Sorting and Filters

Columns within the Alarm Queue can be manipulated to accommodate Operator preference. Columns can be hidden, shown, moved, sorted and filtered. Certain columns are fixed, meaning that when no other optional column is selected these will still be present, while others can be added or removed from view.

**Alarm Queue - Monitoring Group 0 (11 Alarms)**

Time	Priority	Customer	Event	Availability	Status	Suspend Time
Mar 05, 09:02:58	4	Bold Towers	Burglary Alarm	Available	Actioned	Jan 01, 00:00:00
Feb 07, 17:00:02	10	John Adams	Late To Close	Available	New	Jan 01, 00:00:00
Feb 07, 17:00:02	10	Gas & Sip	Late To Close	Available	New	Jan 01, 00:00:00
Feb 07, 19:00:02	10	University Activity Center	Late To Close	Available	New	Jan 01, 00:00:00
Feb 07, 23:00:02	10	Clark Apparel #1001	Late To Close	Available	New	Jan 01, 00:00:00
Feb 07, 23:00:02	10	Clark Apparel #1002	Late To Close	Available	New	Jan 01, 00:00:00
Feb 07, 23:00:02	10	Clark Apparel #1003	Late To Close	Available	New	Jan 01, 00:00:00
Feb 07, 23:00:02	10	Clark Apparel #1004	Late To Close	Available	New	Jan 01, 00:00:00
Feb 07, 23:00:03	10	Clark Distribution Center	Late To Close	Available	New	Jan 01, 00:00:00
Feb 08, 02:00:01	10	Gas & Sip	Late To Close	Available	New	Jan 01, 00:00:00
Feb 24, 19:00:01	10	Bold Towers	Late To Close	Available	New	Jan 01, 00:00:00

Counts: 1: 0, 2: 0, 3: 0, 4: 1, 5: 0, 6: 0, 7: 0, 8: 0, 9: 0, 10+: 10, Total: 11

Suspended: 0, New: 10, Viewed: 0, Actioned: 1

Message: (12-34) Alarm Process Problem for "Late To Close" of priority 10 for monitoring group 0 ... 0 Clear

Alarm Queue, Columns

## Fixed Columns

Time	Posted date and time the alarm hit the queue
Priority	Number coordinating to the level or importance of the alarm; numbers range from 1-100, with 1 being of highest priority
Customer	Customer name
Event	Description of alarm
Availability	Shows whether or not an alarm is available for an Operator to handle
Status	Suspended, New, Deferred or Actioned
Suspend Time	Date and time when alarm was suspended

## Optional Columns


These columns can be added to or removed from the Alarm Queue list by simply right-clicking in the column list and selecting or de-selecting (checked or unchecked).

Alarm No	Combination of the account's unique identifier within the system and alarm sequence number as it came in to queue that can be provided to authorities upon request
Action ID	Action Pattern tied to alarm
RLP	Receiver Line Prefix assigned to account/signal; clearly separates and defines accounts

TXID	Transmitter ID; account no. of dialer/radio/GSM sending in signal
Code	Manitou Event code associated with alarm
Event Category	Assigned category; allows for management for Monitoring Groups and Disaster Mode
P/F/M	Police/Fire/Medical; Yes or No depending on whether P/F/M has been contacted
Last Activity Time	Last time an action was taken on alarm
Post Code	Postal/Zip Code on customer record
Customer ID	Customer account number
User	Operator that last handled alarm
Area	Area presented with alarm
Zone	Zone presented with alarm
Point ID	Zone, or Point ID, description defining alarm location or detail
Language	Language tied to customer account
More Act	Yes or No, if additional activity on event exists

## Sorting

Columns within the Alarm Queue may be sorted in either ascending (A-Z, 1-10, or chronological order) or descending (Z-A, 10-1, or reverse chronological order) order depending on the direction of the arrow that display when you click on a Column Header.

 **The Alarm Queue will stay sorted by selection even when navigating away from the page. To revert back to default sorting order, click once on the Priority column.**

Column order can also be adjusted by selecting dragging and dropping individual columns. To move a column, click and hold on the Column Name and drag it to the preferred location.

## Filtering the Alarm Queue

Filtering allows the Operator to set specific criteria that must be met before an alarm is shown. Only those alarms matching the filter requirements will be shown in the Alarm Queue. Filtering is most commonly used in emergency situations where seeing specific events may be useful.

Access to the Filter screen can be done in one of three ways:

- Click the *Filter* - F tab at the bottom of the Alarm Queue
- Press <2> on the keyboard

- Click the **Filter Off** button at the top of the Alarm Queue (notice the red light on the button)

Alarm Queue, filter

- To set up a filter, choose the filtering parameters by clicking the appropriate checkbox(es).
- Once complete, click the **Select** button to apply the filter and return to the Alarm Queue.

Now, the filter button at the top of the Alarm Queue reads **Filter On** and the light shows green beside it.

Time	Priority	Customer	Event	Availability	Status	Suspend Time
Mar 06, 09:02:58	4	Bold Towers	Burglary Alarm	Available	Actioned	Jan 01, 00:00:00


Alarm Queue, filter button

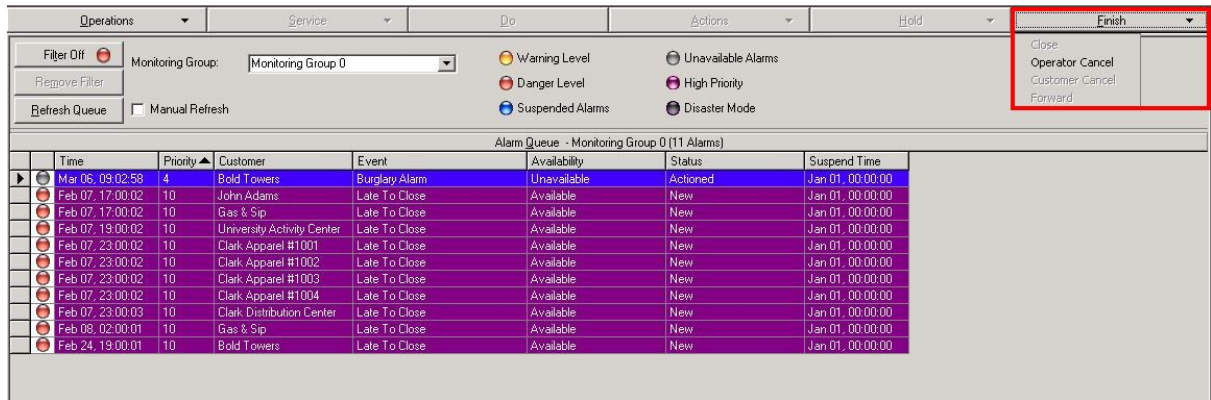
➤ To return to the full queue, click the **Remove Filter** button or press <m> on the keyboard.

Notice the filter button changes to **Filter Off** with a red light.

## Finish Menu

From time to time it may become necessary to clear alarms from the Alarm Queue. This is performed using the Finish drop-down menu.

 Typically, these bulk clearing of alarms occurs during mass emergency situations such as storms or power outages.



Alarm Queue, Finish menu

## Clearing an Alarm

1. To clear an alarm, first click the Event to clear in the Alarm Queue alarms list.
2. Click the *Finish* pull-down menu, then select *Operator Cancel* (or press <F> then <O> on the keyboard).
3. Input password and press <Enter> on the keyboard.
4. Type reason for canceling alarm and select the *Event Code* tab from bottom of *Operator Cancel* window.



The screenshot shows the 'Operator Cancel' window. It has a 'Password' field with a key icon and a prompt '(Type password and press the Enter key)'. Below is a 'Batch Cancel' section with a speaker icon and an 'Event Code' dropdown menu. The dropdown is open, showing a list of event codes and descriptions. To the left of the dropdown is a 'Resolution Code' field with a circular icon. Below that is a 'Comments' text area with a notepad icon. At the bottom right are 'Cancel Alarms' and 'Close' buttons. At the bottom left are tabs for 'Customer', 'Event Code', and 'Disaster Events'.

Event Code	Description
*I	User Number
*ID	User ID
*J	Trouble Restore
*K	AC Restore
*L	Low Battery
*LC	Late To Close
*LG	Late Check-in
*LO	Late-To-Open

Operator Cancel screen, Event Code list

5. Select an event code from the *Event Code* drop-down list.

*Not all alarms can be canceled from the Alarm Queue - priority events 1, 2, 3, and 4 are not allowed to be cleared from the alarm list.*

*Some Event Categories cannot be flagged for clearing.*

6. Enter or select the applicable resolution code for the event.
7. Click **Cancel Alarms**.
8. At the warning, stating that you must be an Alarm Handler in order to continue, click **Yes**.

*This action will clear all alarms of that type with the same resolution code and reason as well as the one just canceled.*

**This appends the Operator User ID to the cleared events within the Customer Activity Log.**

## Alarm Handling Form

Designed to contain every bit of information needed to successfully process alarms, the *Manitou Alarm Handling Form* helps Operators handle alarms without the need to navigate away from the screen. The *Alarm Handling* screen is made up of 9 tabs (located along the bottom of the window). These tabs are accessible, or not, depending on the information contained within the Customer account.

## Alarm Tab

The primary tab in the process of alarm handling is the *Alarm* tab. When selecting an alarm, the *Alarm Handling* window will automatically default to this tab for processing.

*Tabs can also be accessed by typing the number associated with that tab (1-9). Example: Press [1] for the Alarm - 1 tab, [2] for Plans - 2, etc.*

### Alarm Tab - 1

The **Alarm** tab provides information on the Customer, Dealer, account Status and Alarm(s).

The screenshot shows the 'Alarm Handling Alarm Tab' interface. It includes sections for Customer Info, Dealer Info, Alarm Info, and a central Action Pattern window. The Status window is on the right, and the Activity Log is at the bottom. The Notification Ribbon is on the far right. The Alarm Info section shows a 'Burglary Alarm' with Priority 4 and Time 03/06/2012 09:02. The Activity Log shows a list of events with columns for Date, Time, Log Description, and User ID.

Alarm Handling Alarm Tab



### Customer Info

The Customer information section contains details of the Customer record including:

- Account Number
- Account Name
- Address, city, state and zip
- Cross Street and Subdivision, when applicable

*Cross Street and Subdivision names aid dispatching. Many times the physical address may not be helpful when directing authorities or others to the alarm location. Offering the Cross Street and/or Subdivision can speed alarm response.*

The **Customer Info** button, located on the top left corner of the *Customer* section, contains a link to the Customer's telephone number and other site-specific contact points such as email addresses. If there is a single site telephone number, clicking the button can

automatically dial the number (if the auto-dialing on the account has been properly configured).



### Dealer Info

The Dealer information section is located just below the customer details and provides the Dealer ID and name. Since contact points for Dealers are more important to see than the address, this section displays the dealer contact telephone numbers.


 *Not all customer records will contain Dealer information.*

The **Dealer Info** button lists the dealer address.



### Alarm Info

The Alarm information section, designed to draw attention to the alarm displayed, presents a colored bar containing the alarm description. This description immediately notifies the Operator of what alarm they are handling.

 *Colors will vary from alarm to alarm.*

The following are definitions of the details included within the Alarm information section:

- **Priority** - rated importance of the alarm, numbers range from 1-99 (with 1 being of highest priority)
- **Time** - includes the date and time the alarm arrived into the system
- **System** - system on the Account to which the alarm applies
- **TX** - transmitter associated with the alarm
- **Area** - area (partition) where the alarm was tripped
- **Zone** - number of the zone where the alarm was tripped
- **Point ID** - point or zone description of the tripped alarm

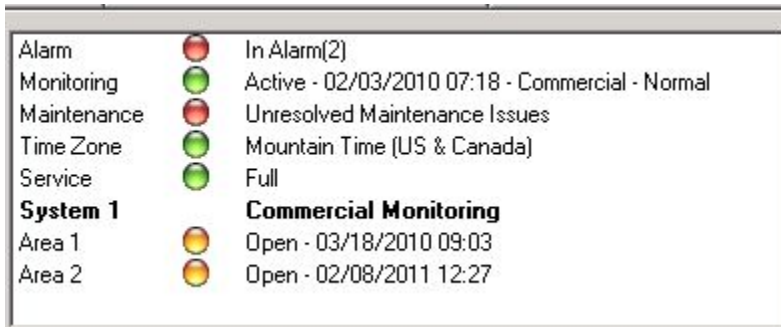
The button on the upper-left corner of this section displays the same information within the Alarm information section, in a top-down fashion. This is done for ease of reading as well as displaying the notes tied to the transmitter, when applicable.

### UL Mandated Priority

- **Priority 1:** Fire
- **Priority 2:** Panic/Duress/Holdup
- **Priority 4:** Burglary
- **Priority 5-99:** All levels of supervisory or trouble (may mean problems with equipment; not dangerous to life or property)

## Status Window

The upper right-hand section of the alarm form contains the Status section. This section is a "snapshot" of the health and welfare of the account. Each item gives the Operator important information about the Customer account.



**Alarm** - A red light indicates active alarms in queue for a particular account, the number in parenthesis shows how many alarms in queue. If there are any unrestored items for this account, they will also be displayed here.

**Monitoring** - Green light indicates account is active; Yellow is inactive, and Red is deactivated

**Maintenance** - Red light denotes Unresolved Maintenance Issues

**Time Zone** - Displays the time zone where the customer record resides

**Service** - Indicates if account is currently [On Test](#)

- Green = Full Service, nothing On Test
- Yellow = Partially On Test, some portion(s) of the account is On Test, but not entire account
- Red = Whole System On Test, the entire account record is On Test

**System** - Each system on the account is identified by name (ie, System 1 in the above visual)

**Area** - Displays area status = Open, Closed, Unknown

- Open = Yellow indicator (system open/disarmed)
- Closed = Blue indicator (system closed/armed)
- Unknown = Red indicator (system has not received an open or closing event to identify current status and is, therefore, unknown)

## Action Pattern

The Action Pattern section, located just below the *Status* window, contains the step-by-step instructions on how to handle the presented alarm. Manitou Action Patterns contain all the information necessary to handle the alarm from beginning to end. Not only does the Action

Pattern display what to do (who to call) and in what order, it also provides clear, complete instructions.



### Action Pattern Color Coding

- Red - completed task
- Yellow (with arrow) - current task
- Green - task(s) yet to be completed/upcoming task(s)

### Action Pattern Radio Buttons

- **Action Pattern** - provides the Action Pattern associated with the alarm
- **View All Contacts** - shows all available contacts listed on the account, this can include contacts, keyholders, Dealer, and authorities
- **View All Call Lists** - displays the preferred order of contact (persons/entities listed in order of preferred contact)

### Enhanced Action Pattern

The Enhanced Action Patterns feature offers decision-tree functionality, and allows you to link Action Patterns together. Because Enhanced Action Patterns offer decision points, they allow you to implement dynamic and incident-specific actions. Finally, Enhanced Action Patterns provide you with a means of collecting data and logging information along the path to closing an incident.

See [Action Patterns and Enhanced Action](#) Patterns and the related subtopics for more information.

### Important Information Regarding Enhanced Action Patterns

- Call Lists and related contacts are a large part of Enhanced Action Patterns. Call Lists within Enhanced Action Patterns can connect you to sub Call Lists. And contacts connect you to an account's Contact Point. Using the Auto-Dialer, you have the ability to make an outbound connection in conjunction with the Enhanced Action Pattern

decision-tree functionality.

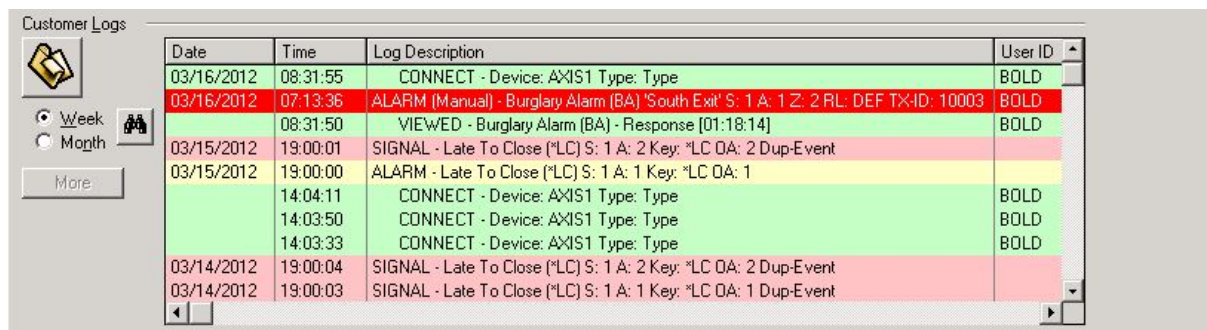
**Important:** Because contacts are a large part of Enhanced Action Patterns, it is important to ensure that contact phone numbers are accurate and valid.

- Contacts within Enhanced Action Patterns can get involved, for example, while you're handling one alarm, you might get a contact who calls in on an alarm that another operator is handling, in which case you'll have to transfer that contact to the appropriate alarm and operator.
- The most common actions within Action Patterns are Contacts, Show, and Log.
- When you double-click an Action Pattern, pre-designated programming runs in the background.
- The Enhanced Action Patterns decision-tree is a "dynamic" navigation that can change based upon the action that you take.
- Action Patterns are designed to be keyboard driven for speed and simplicity. The two most common keyboard shortcuts you will use within Action Patterns are A + A, which initiates the "Alarm" and "Actions" commands; and pressing the D key for "Do." As stated earlier in this online guide, to see a complete list of all keyboard shortcuts, press the Shift + ? keys at the same time on your keyboard while in Manitou.

## Customer Logs

The Customer Activity Log, within the Alarm Handling form, displays the signals and alarms received on the account over the last seven (7) days by default and can be changed to show the last month. This log sorts by the most recent activity, displaying it immediately underneath the Event line.


To change the view from one week to one month, or vice versa, click the appropriate radio button to the left of the *Customer Logs* window.



Date	Time	Log Description	User ID
03/16/2012	08:31:55	CONNECT - Device: AXIS1 Type: Type	BOLD
03/16/2012	07:13:36	ALARM [Manual] - Burglary Alarm (BA) 'South Exit' S: 1 A: 1 Z: 2 RL: DEF TX:ID: 10003	BOLD
03/15/2012	08:31:50	VIEWED - Burglary Alarm (BA) - Response [01:18:14]	BOLD
03/15/2012	19:00:01	SIGNAL - Late To Close (*LC) S: 1 A: 2 Key: *LC OA: 2 Dup-Event	
03/15/2012	19:00:00	ALARM - Late To Close (*LC) S: 1 A: 1 Key: *LC OA: 1	
	14:04:11	CONNECT - Device: AXIS1 Type: Type	BOLD
	14:03:50	CONNECT - Device: AXIS1 Type: Type	BOLD
	14:03:33	CONNECT - Device: AXIS1 Type: Type	BOLD
03/14/2012	19:00:04	SIGNAL - Late To Close (*LC) S: 1 A: 2 Key: *LC OA: 2 Dup-Event	
03/14/2012	19:00:03	SIGNAL - Late To Close (*LC) S: 1 A: 1 Key: *LC OA: 1 Dup-Event	

The activity log automatically refreshes upon receipt of new signals; however, the log can be manually refreshed by clicking the **Refresh Customer Logs** button (file folder button) located to the left of the *Customer Logs* window.

It is easy to lose track of the current alarm while scrolling through the alarm list. The **Find Current Alarm** (binoculars) button located between the radio buttons and the Customer Logs window locates the current alarm, highlighting it for ease of reference.

 *New activity will continue to occur on the account; the current alarm will be highlighted and any subsequent alarms received will fall in to the log above it.*


The Activity Log will show up to 1,000 lines by default. When more the log contains more than 1,000 lines, the **More** button can be used to load the next 1,000. Each click of the button brings in an additional 1,000 lines at a time (as applicable). If the **More** button is not activated, there are less 1,000 lines currently in the log, or all lines have already been added to the log.

## Notification Ribbon

A ribbon of notifications has been included on the right side of the alarm handling screen for ease of use and to de-clutter the screen for the Operator. This ribbon indicates different notifications that may come up during alarm processing. When a notification is received, the icon associated with it will flash yellow, letting the Operator know a notification is available for review and/or processing. For more information on the notifications, see Getting Started, Menus, Toolbars, and Ribbons: Notification Ribbon.

## Additional Tabs

Additional tabs are located across the bottom of the Alarm form containing useful information for handling alarms. Click any tab available to access the information it provides.

 *Tabs can also be accessed by typing the number associated with that tab (1-9). Example: Press [1] for the Alarm - 1 tab, press [2] for Plans - 2, etc.*

### Plans Tab - 2

The second tab on the *Alarm Handling* form displays any available Plans. Plans are images of the account property; if configured, the *Plans-2* tab can show schematics, drawings, floor plans, etc. In use with an alarm, these plans can show valuable information such as a tripped zone and all other zones of an area, as well as provide access to devices such as cameras. For more information, see [Data Entry: Plans](#).

### Schedule Tab - 3

The *Schedule* tab displays the current week's combined schedule (Monday through Sunday). When available, this tab shows the actual schedule for an account based on the Permanent, Alternate, Holiday and Temporary schedules.

 *Manitou displays the current day in black text while all other days are displayed in grey.*



## Alarm Report - 4


This tab displays a list of all persons contacted while handling the alarm. The Alarm Report generates a unique identifier located at the top-left of the form called the *Alarm Report Number*. It is made up of the account serial number and the sequence number for the individual alarm separated by a hyphen.

**Example:** Alarm Report No. 11-3252

In conjunction with listing each person contacted, the Alarm Report also contains the times each contact was made. The report will also note initial contact (*On Location* column), as well as if they call in (*Notify* column) and when the alarm is cleared.

Incident Report No. 30-786					
Contact Type	Name	Incident No.	Notify	On Location	Cleared
Person	Fred Jones			03/28/2012 08:34:59	
Customer	Clark Apparel #1001			03/28/2012 08:35:14	

Alarm Handling, Alarm Report

 This report information can also be found within the [Alarm Detail Report](#) as well as sent to the Customer if Report Action has been listed as an [Action Pattern](#) item.

## Comments - 5


The fifth tab on the *Alarm Handling* form contains any and all comments related to this account or entities tied to this account. This can include temporary, permanent and special instructions for the customer, dealer, authority, agency or other entities with a relationship to this account.

## Zone Status - 6

The number six tab on the *Alarm Handling* form is the *Zone Status* form. This displays any currently unrestored items. An unrestored item may be an alarm event that has a restore required and the restoring event has yet to arrive or it could be a system item such as a Late To Test.

## Reverse Channel - 7

The *Reverse Channel* form, when applicable, enables the sending of reverse commands that interact with external pieces of software or equipment.

 Reverse commands are generally applicable when using add-on modules such as Access Control or through custom additions to the software.



## Service Tickets - 8

When the Manitou system is connected to an accounting package, such as SedonaOffice®, service tickets may be accessed, viewed and created using the *Service Tickets* tab.

## User Defined - 9

The number nine tab on the alarm handling form accesses the *Customer User Defined* fields. These are customer-specific designations that can contain a variety of different fields (radio buttons, checkboxes, etc.) or simple text.

# Receiving Alarms

Receiving an alarm can be done four (4) different ways:

- Alarm Handling shortcut on the Getting Started, Menus, Toolbars and Ribbons: Quick-Launch Toolbar
- **Operations** menu → **Alarm Handling**
- Customized shortcut on the personalized navigator (for more information on personalizing shortcuts, refer to Navigator Pane, in the *Getting Started* chapter.)
- Double-clicking an alarm within the [Alarm Queue](#); this is called "Cherry-Picking" and is only recommended in instances where Operators have been organized into groups handling specific types of alarms or particular cases where it may be necessary to handle select alarms.


We recommend receiving alarms in the *Alarm Handling* screen in one of two ways:

- Manual Alarm Handling (default setting)
- Auto-get

 *Alarm Handling mode is typically set as a global function.*

## Setting Alarm Handling Mode

1. To set the Alarm Handling mode, access the *Alarm Handling* screen and click the **Operations** button at the top of the Activity screen. The *Alarm Handling* screen may be

reached from either the **Operations** pull-down menu or the  button located on the toolbar.

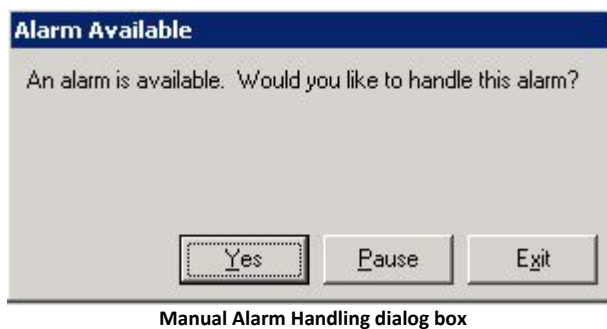
2. Select **Alarm Handling Options** from the **Operations** drop-down menu.

3. From the *Alarm Handling Options* dialog box, select either the **Auto Get** checkbox or Alarm Type preference.



## Manual Alarm Handling

When in Manual Alarm Handling mode, a new alarm presents to each Operator with a dialog box that offers the Operator three choices: **Yes**, **Pause** and **Exit**.



- **Yes** - accepts the alarm and loads it to the Operator's screen
- **Pause** - denies the alarm and places the Operator into an "Paused" status; to restart alarm handling, click **Operations** pull-down menu and deselect **Pause Alarm Handling**
- **Exit** - denies alarms and removes the Operator as an Alarm Handler

## Auto-Get

When Auto-Get is turned on, the alarms will auto-populate the alarm screen. The alarm presents with a single audible "ding" when the alarm loads to the screen. Manitou balances the load while presenting alarms to Operators within Auto-Get, rotating alarms to Operators .

## "Cherry Picking"

It is possible to collect an alarm from the alarm queue simply by double-clicking an event. This is called "Cherry Picking".

- ☛ While there are times when it is necessary to pull a specific alarm from the alarm queue, Cherry Picking is not the recommended alarm handling process. Cherry Picking can negatively affect alarm processing by creating a situation where two Operators are handling the same customer record at the same time. This can cause double dispatching.

## Processing Alarms

All alarms will have either an [Action Pattern](#) to follow or [Enhanced Action Pattern](#) to work through.

- For basic alarm handling through an Action Pattern, an Operator can simply press <D> on the keyboard, or click the **Do** button at the top of the screen, to initiate the first action.

The Action Pattern, located in the bottom white window of the *Alarm Handling* screen, will list all of the actions in order for the Operator to take to process the alarm.

**Customer Info**  
C1001 - Clark Apparel #1001  
8745 Mountain View Drive  
Colorado Springs  
CO 80913  
Cross Street: N/A  
Subdivision: N/A

**Dealer Info**  
CLARK - Clark Apparel Company  
Site: (719) 555-9761  
E-Mail: bobb@boldgroup.com

**Alarm Info**  
**Medical Alarm**  
Priority: 2 Time: 03/16/2012 07:14  
System: 1 - Commercial Alarms  
Tx: 1 - Main  
Area: 1 - Store  
Zone: 2 - Added by Signal Handler

**Customer Logs**  
Week  
Month  
More

Date	Time	Log Type	Event Name	Additional Information
06/13/2012	23:00:02	SIGNAL	Late To Close	QA: 1 Dup-Event
06/12/2012	23:00:02	SIGNAL	Late To Close	QA: 1 Dup-Event
06/11/2012	23:00:03	SIGNAL	Late To Close	QA: 1 Dup-Event
06/09/2012	23:00:01	SIGNAL	Late To Close	QA: 1 Dup-Event
06/08/2012	23:00:00	SIGNAL	Late To Close	QA: 1 Dup-Event

Alarm - 1 Plans - 2 Schedule - 3 Alarm Report - 4 Comments - 5 Zone Status - 6 Reverse Channel - 7 Service Tickets - 8 User Defined - 9

Action Pattern window

- ☛ If the alarm comes up with the Action Pattern grayed out, click the View All Contacts radio button and follow standard procedures for the type of alarm it is. Example: If a medical alarm is received and it is standard procedure for your facility to contact the local emergency authorities, then that would be the number in the all contacts to be used.

## PSAP Authority Contact

- ☛ The following must be set up within Manitou Operator Workstation for this option to be available:

- **An Authority must exist in the Action Pattern or Call List.**
- **The PSAPLKUP (PSAP Look Up) command needs to be included with the GPS Event within Programming.**

A PSAP (Public-Safety Answering Point) is a call center responsible for answering calls to an emergency telephone number for police, fire, and medical services.

When an Operator presses D on the keyboard or clicks the **Do** button for an Action Pattern, and the next action is an Authority, this option provides an immediate PSAP lookup for a specific Authority type (police, fire, medical), if the information is available.

- **PSAP Authority:**
  - **Fire** – A department of a local or municipal authority in charge of preventing and fighting fires.
  - **Medical** – A department of a local or municipal authority in charge of offering medical service.
  - **PERS** – A Personal Emergency Response Service that you can contact by pressing a contact button in your home or office.
  - **Police** – A city, county, or state law enforcement agency that upholds the law and prevents crime.
  - **TwentyFourBySeven** – This is the PSAP number that Manitou uses to contact the older version of PSAP Service. Operators should only use it as a backup telephone number if any of the police, fire, medical, and PERS telephone numbers are inaccurate or disconnected. There is not an intent for these numbers to be primary telephone numbers to use for alarm-related calls, but only as a backup.
- **Coverage Area** – The included areas or regions for the selected PSAP Authority Contact.
- **Coverage Exception** – The excluded areas or regions for the selected PSAP Authority Contact.
- **Coverage Comments** – Any remarks that are relevant for the coverage area for the selected PSAP Authority Contact.
- **PSAP Comments** – Any remarks that are relevant to your Public-Safety Answering Point.

## Contact Action

A Contact Action is an action that requires the Operator to pick up the telephone and

contact a responsible party, customer, dealer or authority. When the Action Pattern contains a contact action, such as **Contact Customer**, the Auto-Dialer appears. Depending on the telephone system, the auto-dialer will either begin dialing automatically, prompt the Operator to select a line to use and click Dial, or it may be necessary to pick up the telephone and manually dial.



Action Pattern, Auto-Dialer

The key reason for this interaction is to log the Call Response. The Call Response is the result of the attempt to contact.

*✉ The **Phone Dialer** may also be accessed through the **Tools** pull-down menu.*

Available Call Responses are:

- **Contacted** - Someone responsible answered the call and provided additional details and/or took responsibility of alarm.
- **Busy** - The line contacted was busy; the call was unable to complete.
- **No Answer** - The call was not answered by person, answering service, message machine or voicemail.
- **Left Message** - Operator left message for contact with a reliable source - answering service or machine or voicemail. A child at the location is not considered a reliable source and should not be used for message delivery.

*✉ It is possible to create a Paged Contact List to manage those persons awaiting*

*response from. The system will prompt the Operator with the ability to create a Paged Contact.*

- **Not In** - The contact person is not available. It is recommended to select this choice if a message has been left with a child.
  - **Won't Respond** - Contact person will not respond to the alarm.
  - **Abort** - Cancel the call.
  - **Error** - Error with the phone number, such as disconnected or incorrect, and cannot complete the call. When selected, the system will prompt Operator to create a Maintenance issue. This documents the issue and will generate warnings to others attempting to contact this number.
  - **Unknown** - Unable to determine issue for call not completed; generally the line usually goes dead or silent.
- ☛ **Pressing <Enter> on the keyboard closes the Phone Dialer. Use the Mouse to select the appropriate action and button.**

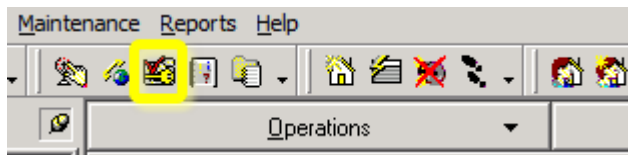
## Validate Password

Password verification provides authenticity for use in a variety of situations, including the following:

- Customer
- Manual Signal
- Paged Contacts
- Pre-cancel
- Temporary Comments
- Temporary Schedule

Users may also utilize the Question/Answer mode as an alternative to having to provide a password. Only customer contacts, agencies, and agency contacts are allowed to have questions. This means that the question mode is only enabled for the Customer (Keyholder), Technician, Agency, and Unknown verification options, and gets written to the log as "VERIFICATION – Customer Question Answered Correctly".

The new Verify Password toolbar button is also enabled when there is an entity loaded on the Agency, Branch, Company, Dealer, and Global Keyholder forms, allowing the Operator to directly validate these entities' contacts as well:



Customers that appear on other customers' contact lists can now be validated in the *Verify Password* dialog via their general/duress passwords or the passwords of their contacts. Customers may also have their own set of access permissions and valid date ranges, which are merged with those access permissions of their contacts.

## Suspending Alarms

An alarm is typically suspended in situations where more information is needed or waiting for a reply from a Contact. If not listed as an Action Pattern item, it is possible to manually place an alarm On Hold (Suspend).

1. From the Alarm Handling screen, click **Hold** then select **Suspend**, or type <H> then <S> on the keyboard, to bring up the *Suspend Alarm* options.

 A screenshot of a dialog box titled 'Suspend Alarm'. The dialog has a 'Suspend Options' section with two radio buttons: 'Select interval' (which is selected) and 'Select date and time in customer local time'. Under 'Select interval', there is a 'Suspend Alarm for:' label followed by a numeric input field containing '1' and a unit selection area with three radio buttons: 'Second(s)', 'Minute(s)' (which is selected), and 'Hour(s)'. Under 'Select date and time in customer local time', there is a 'Suspend Until:' label followed by a date input field containing '03/28/2012' and a time input field containing '14:26'. Below these options is an 'Alarm Priority' section with a numeric input field containing '10'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.


Suspend Alarm

2. Select one of the two options available to suspend the alarm.
  - **Select interval** - puts the alarm on hold for a specified period of time; can designate seconds, minutes or hours

*✎ If a new alarm of the same event and zone arrives while this alarm is still on hold, it will release and return to the queue and/or Operator handling the alarm.*

  - **Select date and time in customer local time** - select a specific, localized date and

time to place the alarm on hold. Selecting this option determines when the alarm will next be available for an Operator


 *This option keeps the alarm on hold until the specified date and time have been reached, regardless of any new event activity.*

3. Click the **OK** button to accept.

## Setting Alarm Priority

When an alarm is already dispatched, the alarm is no longer its original priority. It is possible to lower the event's priority to ensure it doesn't overtake a new alarm of the same type. Suggested ideas for offsetting priority:

- Add a "1" to the front of the original priority number, turning a priority 1 alarm into 11, 2 into 12, etc.
- Add the same number to the priority, turning a 1 into 11, 2 into 22, etc.
- Change the priority to a level below the most common priority events, such as priority 6.

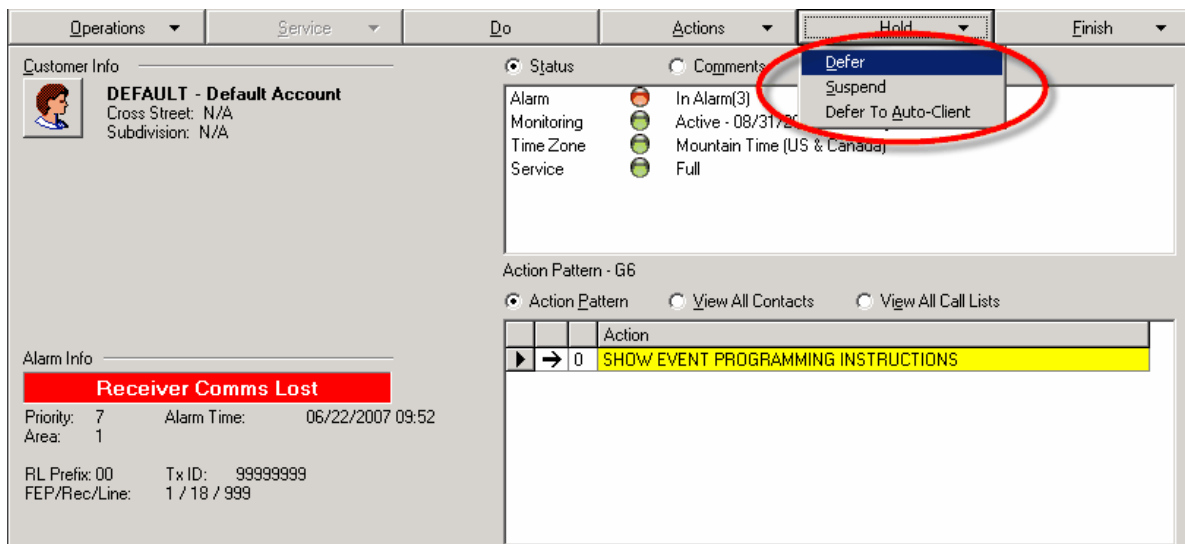
 *Tracked alarms "wait" for the tracked Operator upon expiration of the suspension time unless tracking is removed or the Operator exits Manitou.*

## Deferring Alarms

If an alarm is presented to an Operator who cannot handle it at that time, the Operator may defer the alarm back to the [Alarm Queue](#), making it available to other Operators. This option is only available to an Operator when he or she has actually accepted the alarm from the Alarm Queue.

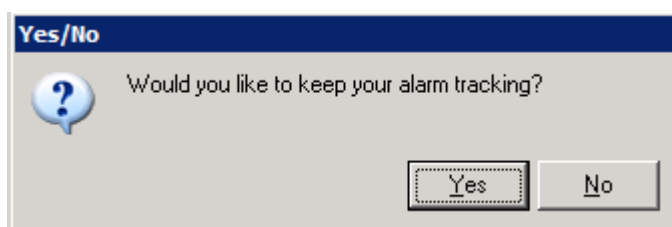
To defer an alarm select the **Hold** menu on the Alarm Handling screen and choose **Defer**.





Defer alarm action

When selected, the **Defer** option will ask the operator if he or she would like to keep alarm tracking:

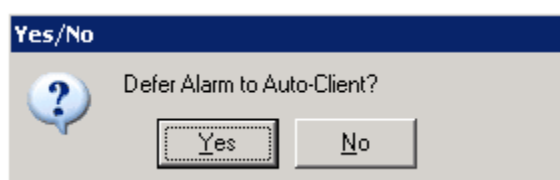


Keep Tracking - Yes/No

- If the operator chooses **Yes** then future alarms for that same account will go to him or her.
- If the operator chooses **No** then future alarms for that same account will go to a different operator.

## Deferring to Auto-Client

The Defer to Auto-Client option sends the currently-handled alarm to the Auto Client. Select Auto-Client by first selecting the **Hold** menu > **Defer to Auto-Client**. You will receive this confirmation:



- Click **Yes**. The alarm will now be handled by Auto-Client.

## Additional Action Pattern Items

While not as commonly used as Contact Action, Validate Password, or Suspend, these items may also be included within an Action Pattern.

- **Remark** - will provide any programming commands that may be relevant
- **Log Line** - adds a line item to the log
- **Show** - shows any floor plans, notes, etc. attached to the customer record
- **Attention** - displays an attention line to the Operator with additional information
- **Report** - sends out an alarm report - a list of everyone that has been contacted; this is usually the last item in an Action Pattern
- **Send** - sends reverse command
- **Connect** - connects to a device such as a camera, door card reader, etc
- **Include** - includes additional Action Pattern items in to an existing Action Pattern; adding another Action Pattern into an existing one based of qualifying conditions such as schedules, GPS alarm, recently on-test, etc
- **Escalate** - escalates the alarm to another processor or authority

## Closing Alarms

Upon completion of all actions, the alarm must be closed. Many Action Patterns may contain a Close command; however, if it is not present, it is possible to close the alarm manually using the **Finish** button.

1. Click the **Finish** button, or press [**F**] key, to access the Finish menu.

Select one of the three options available to complete the alarm.

- **Operator Cancel** - requires the Operator to enter the assigned password used to log on to Manitou, then press **<Enter>** to complete the alarm
- **Close** - when all required actions are complete, the Close command closes the alarm
- **Customer Cancel** - requires a valid customer general password or contact's password to close the alarm

2. At the *Close Alarm* prompt, select a **Resolution Code** and press **<Tab>**.

3. Add any additional comments and press <Enter>.

 For additional information on processing alarms, please refer to the [UL Alarm Handling Summary](#).

## Extending a Late to Close Schedule With an Alarm

It may be helpful to understand how Late-to-Close and related features operate in Manitou. Following is a brief summary.

- **Late-to-Close** signals indicate that a site was not armed at its scheduled time. When this signal is received, operators will have the option to extend the account's close time (schedule). If an operator extends the schedule, Manitou will automatically create a "Must Close," which specifies when that site, etc. needs to be armed. If the site is not armed by that time, another Late-to-Close signal will be generated.
- **Late-to-Open** signals indicate that a site was not unarmed at its scheduled time. When this signal is received, operators will have the option to extend the account's opening time (schedule). If an operator extends the schedule, Manitou will automatically create a "Must-Open," which specifies when that site, etc. needs to be unarmed. If the site is not unarmed by that time, Manitou will generate a Late-to-Open signal.
- **Unscheduled Open** signals indicate that a site was unarmed outside of its scheduled time. When this signal is received, operators will have the option to extend the account's opening time (schedule). If an operator extends the schedule, Manitou will automatically create a "Must-Close," which specifies when that site, etc. needs to be re-armed. If the site is not armed by that time, Manitou will generate a Late-to-Close signal.
- **Unscheduled Close** signals indicate that a site was armed outside of its scheduled time. When this signal is received, operators will have the option to extend the account's closing time (schedule). If an operator extends the schedule, Manitou will automatically create a "Must-Open," which specifies when that site, etc. needs to be unarmed. If the site is not unarmed by that time, Manitou will generate a Late-to-Open signal.

Late-to-Close alarms cannot be closed without first extending the schedule. Likewise, the Application Server does not allow a close to take place on a Late-to-Open/Close or Unscheduled Open/Close alarm. Following are some additional notes about Extending a Late-to-Close schedule.


- An \*LC event code must be received for the extend schedule option to take place.
- The maximum time an operator can enter for the temporary schedule extension is 23 hours.

- Canceling the Extend Close Schedule dialog will close the dialog and cancel the current operation.
- Must-Close extensions take place in the customer's local time.


## Late-To-Close with Temporary Schedule Alarm Handling Example


You receive a Late-to-Close alarm for Customer 001. When closing the alarm, you will be prompted with the *Extend Close Schedule* dialog box.


**Extend Close Schedule**

Access  Name:

☐ Can Open/Close within schedule  
☐ Can Open/Close within temp open window  
☐ Can Open/Close anytime  
☐ Can cancel Alarm  
☐ Can authorize a schedule change  
☐ Can put system On Test  
☐ Can put designated Area On Test  
☐ Can edit Customer  
☐ Can give out Customer information


View 

Comments 

Extend Schedule  Extend By (minutes):    
 Extend To (time):

Extend Close Schedule

Validate the customer and password and then prepare to extend the schedule.

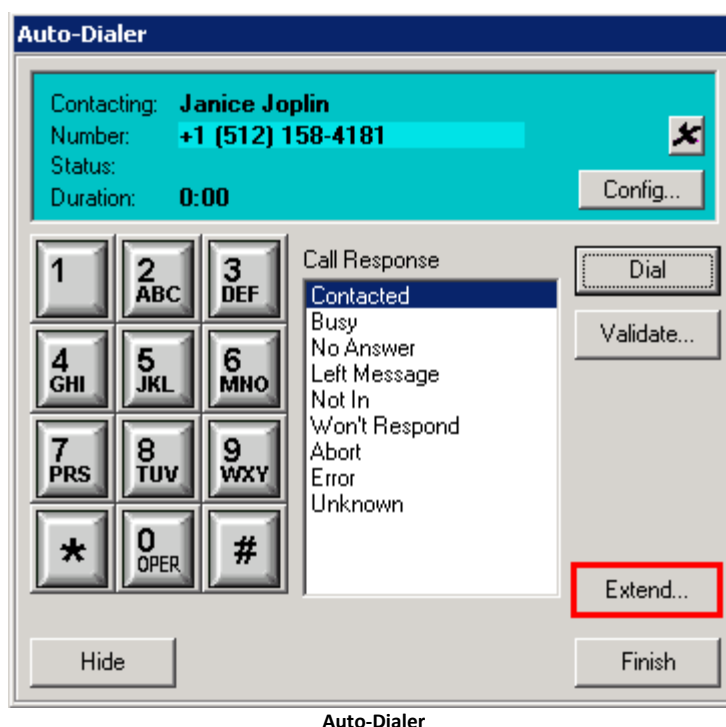
 The schedule can be extended by minutes, or to a specific time, in hours, minutes (HH:MM), but not both.

- The **Advanced** button closes all dialogs and displays the *Temporary Schedule* form. This is the same action as selecting **Actions > Temporary Schedule** tab in the *Alarm Handling*

form. From here, any number of temporary schedule changes can be made as well as viewing the schedule for any given day.

- Once the schedule has been extended, click **Continue** to proceed to the *Close Alarm by Resolution Code* form.
- Users must click **Save** when exiting this form as it automatically opens the form in Edit mode. After saving, you will be prompted to close the *Temporary Schedule* form and return to the *Alarm Handling* screen.

If you are using the Auto-Dialer, you may notice that an **Extend** button is also available, as follows.



This button will display the previous *Extend Close Schedule* dialog.

 This option is only available with an \*LC code.

## Error Messages

Operators may receive an error message if they extend a schedule that overrides an existing schedule. Such messages are only warnings and will not prevent the schedule-extensions from working.

## Schedule Extension Caveats

- The Application Server will check up to seven days in the future for a temporary Must

Close schedule. The alarm cannot be closed without a temporary schedule - whether from a previously-entered (and temporary) Must Close, or from the Extend Close Schedule dialog that was entered during alarm handling.

- Any temporary schedule that was created using the Extend Close schedule dialog will enter a May Open/Close time at the current (and local) time and a Must Close time at the future specified (and local) time. It will also override any schedules in between the two times - with the exception of Temporary Opens.
- Unless a new Extend schedule is written, Operators will only be given one warning (per alarm allocation) that the temporary schedule is too far in the future. If the alarm is suspended or deferred, the allocation ends.

## Alarm Processing Example - Fire


Below is an example of alarm processing using an Action Pattern.

1. Double-click the fire alarm from the [Alarm Queue](#).
2. The first action in the Action Pattern is "Contact customer using Call List Customer Fire." Double-clicking on this action, typing <D> on the keyboard, or clicking the **Do** button at the top of the *Alarm* screen, opens a sub-list with three actions:
  - Contact Customer
  - Contact Fire Department
  - Contact Primary Keyholder
3. Double-click or type <D> on the first action (Contact Customer). This should open the [Auto Dialer](#) which will dial the first contact. If the customer tells the you that the Fire Alarm signal was a false alarm, his or her password will be required to validate the false alarm.
4. Click **Finish** to close the *Auto Dialer*.
5. Enter the customer's password into the **Validate** field.
6. Enter comments into the **Comment** field.
7. Check the boxes for **Cancel Alarm** and **Close Alarm**.
8. Use the drop-down fields to select a **Resolution Code** (in this case, "FA" for False Alarm.)
9. Click **Validate**. The alarm has now been processed and closed. All comments are entered into the *Customer Activity Log* and the Operator is returned to the *Alarm Handling* screen.

## Paged Contacts

The *Paged Contacts* screen allows an Operator to view the contacts that have recently been paged. From this screen an Operator can also handle the alarm, send notifications to other operators or remove the page from the list. Columns in the Paged Contacts form can be sorted with the exception of Call Time and Pager Message.

- To view the *Paged Contacts* information screen, select **Paged Contacts** from the *Operations* pull-down menu.
- 1. To view only the paged contacts for a specific account/customer enter the customer identification number in the **Customer ID** field or select the magnifying glass next to the **Customer ID** field. If searching, The *Find Customer* screen will display. Select and enter the search parameters or use an asterisk (\*) for all results including blanks or a double asterisk (\*\*) for all results without blanks and click the **Search** button. Choose a record from the search results provided by double-clicking on the row.

 To view all of the recent pages for every customer, enter an asterisk (\*) in the *Contact Name* field on the *Paged Contacts Information* screen.

2. The recent paged contacts will display in the results section at the bottom of the Paged Contacts screen. The Customer ID, contact information, Call Time, status and message information are all included within the screen.
3. The **Handle** button above the results section will allow an Operator to select, handle and complete an alarm with a valid [Alarm Status](#). The **Handle** button is grayed out/unusable until an alarm has been selected from the list and password verified.
4. Once an alarm has been selected, click on the **Handle** button to handle the alarm.
5. The *Paged Contact Call In* screen will display. Fill in the **Contact Name** and **Comment** fields and click the **OK** button.
6. The *Paging Contacts* screen will be replaced with the [Alarm Handling](#) screen. The alarm can now be completed.
7. The **Send Notification** above the results section of the *Paged Contacts* screen can be used to notify other Operators about an alarm. The **Send Notification** button is grayed out/unusable until an alarm has an Unavailable Status and there has been no action on the alarm for a specified amount of time. Once this alarm is selected from the results list, the Send Notification button will become active.
8. Click the **Send Notification** button and the *Paged Contact Call In* screen will display. Select the **On Location** or **Clear** button and type a comment in the **Comment** field then click the **OK** button. The comment will be entered into the *Activity Log*.
9. The **Remove** button above the results section of the *Paged Contacts* screen can be

used to remove the paging information from the results lists.

10. Highlight a row and click on the **Remove** button, the *Paged Contact Call In* screen will display.
11. Enter a comment in the **Comments** field and click the **OK** button.
12. All the pages related to the alarm will be removed from the *Paged Contacts* screen and list.


## Alarm Tracking

Alarm Tracking, when configured, tracks alarms to the Operators handling them to prevent double dispatching. Tracked alarms show in the left-hand Navigator node tree, displaying active or suspended alarms under the customer name.

### Tracking

The *Tracking* form enables an Operator to direct all alarms for a particular customer to that Operator for a period of time.

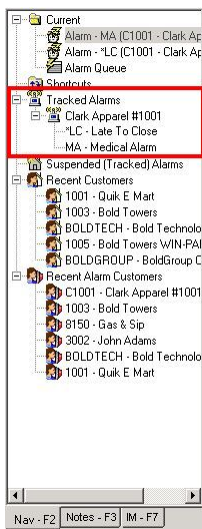
For example, if an Operator is handling an alarm for ABC Company and knows that the customer site will be sending periodic alarms or signals throughout the day, the Operator can opt to track all alarms and signals received by the ABC Company. Once an alarm is handled, the Operator will be prompted to discontinue tracking alarms for that customer. Selecting "No" means that future alarms from ABC Company will continue to be routed to the Operator until the designated time period has expired, and the Operator chooses to discontinue tracking or logs out.

 *The default time tracking is 30 minutes, but can be configured within the Supervisor Workstation.*

### Tracking Display

Alarms tracked to an Operator are displayed in the Navigation tree.





Alarm Tracking

## Alarm Tracking Screen

The *Alarm Tracking* form allows an Operator to add alarm tracking, displays all alarms currently being tracked and provides a way to remove tracking . Tracking may also be designated while in [Alarm Handling](#) mode; an Operator may add to the list of tracked customer accounts.

- To access the *Alarm Tracking* form, select **Operations** pull-down menu > **Tracking** or select **Tracking** from the *Alarm Handling* screen, **Operations** button.

Tracking by Monitoring Group						
User	Master Cust. ID	Customer Name	Monitoring Group	Priority High	Priority Low	Status

- Tracking can be set by **User**, **Monitoring Group**, **System** or **All Sessions**.

If the **All Sessions** box is checked, the *Alarm Tracking* form will show tracking entries for the current user from all sessions. The user must be logged into Manitou from more than one client in order to get more than one session at the same time. The user could be handling an alarm for more than one client, in which case, this would show the tracking for all of the users's sessions.

- The **Priority High** and **Low** fields designate the priority range an Operator can work. If left blank, all alarms will be tracked for this customer to the Operator. Priority ranges are set within the Supervisor Workstation.

Additionally, when exiting OWS while in alarm handling mode (and tracking alarms), the Operator will be prompted with "Would you like to keep your alarm tracking?"

- **Yes** - tracking entries will be recovered when the Client is run again within the timeout period specified
- **No** - tracking will be discontinued

## Add Tracking

Tracking can be added to any account the Operator has access to. To add tracking to an account:

1. Access *Alarm Handling* mode by selecting the **Operations | Alarm Handling**.
  - 📁 *The Operator may only edit items on the Tracking screen while in [Alarm Handling](#) mode. Otherwise, it is read-only.*
2. Click the **Operations** button and select **Tracking** from the drop-down menu to display the *Tracking* screen.
3. Enter the **Customer ID** or use the search icon to search for the Customer account and load it from the search form.
4. Click the **Add** button to load the Customer account information into the Tracking list.
5. Indicate the **Tracking Type** by selecting the appropriate radio button:
  - **User (Operator)** - The account will be tracked by the Operator currently logged into the Manitou system
  - **Monitoring Group**
  - **System** - The account will be tracked by the Manitou system
6. Once the tracking type is selected, the tracked account information displays in the list at the bottom of the form.

## Adopt Tracking

- To take over tracking for another Operator, find the appropriate customer account in the tracking list, and click the **Adopt** button.

An Operator adopting tracking may not have the same level of permissions as the previous Operator. As such, adopting tracking will behave as follows:

### Priority

- If the previous Operator's priority range matches the takeover Operator's priority range, the entry is adopted.
- If the previous Operator's priority range does not match the new Operator's priority range, but the new range fully encompasses the previous' range, the entry is adopted and the priority range is expanded (i.e., priority range 4-6 adopted by a user with range 2-7 – range becomes 2-7).
- If the two ranges do not match and the adopting range does not fully encompass the previous, the original tracking is left as is.
- For more information on Priority, refer to [Processing Alarms: Setting Alarm Priority](#).

### Alarm State (phase)

- If the previous and adopting users' alarm states match, the tracking entry is adopted.
- If the previous' state is New or Viewed and the adopter's state is Both, the entry is adopted and the tracking alarm state is changed to Both.
- If the previous' state is Both and the adopter's state is New or Viewed, the entry is adopted and the tracking alarm state is changed to New or Viewed (adopter's value).
- If the Previous' state is New or Viewed and the adopter's state is also New or Viewed, but they do not match (i.e., previous' is New, adopter's is Viewed), then the original tracking is left as is.

## Remove Tracking

To remove tracking prior to the time limit expiring:

1. Select the appropriate customer account from the Tracking list by clicking on it.
2. Click on the **Remove** button.
3. At the prompt, click **Yes**.
4. To remove all tracked accounts in the list, click on the **Remove All** button. Confirm the removal.

**Reminder:** Tracking expires at the end of the Operator's session, when the Operator logs out of Manitou, if the **No** button is clicked at the *Continue Tracking* prompt.

## New Alarm Notification

All Operators with tracking for a given customer will receive notifications that a new alarm within the specified [Priority](#) range is available.

If an Operator is handling an alarm and a higher priority alarm for the tracked account is received that the Operator is capable of handling, the system will ask if the Operator wishes to defer the current alarm in favor of the new alarm (same as previous to v1.5).



New Alarm Notification

If the user chooses to defer in favor of the new alarm, Manitou will allocate the new alarm before deferring the current. This is done in case multiple Operators are handling alarms for the customer and are eligible to take the new alarm. This is done so that the Operator can opt not to defer their current alarm if they cannot get the new one.

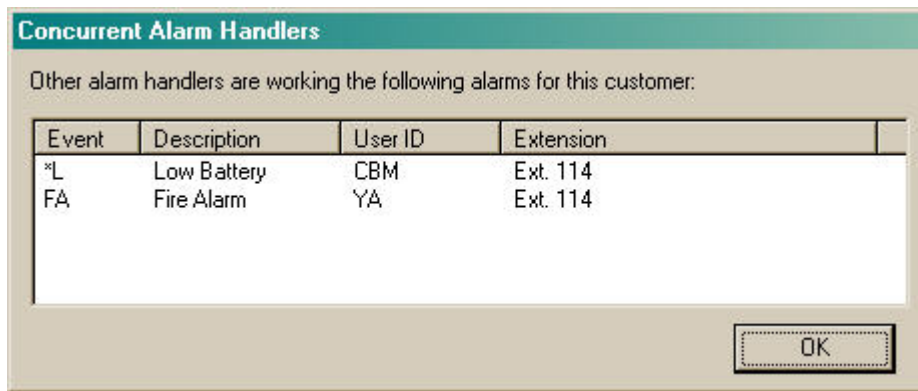
If the Operator is not eligible to handle the newly received alarm because of his/her set priority range, they are still notified that a new alarm has occurred but they are not given the option to handle it.



New Alarm Information

## Concurrent Alarm Handling

When allocating an alarm, Manitou will notify the user if any other alarm handlers are working alarms for the same customer.



Event	Description	User ID	Extension
*L	Low Battery	CBM	Ext. 114
FA	Fire Alarm	YA	Ext. 114

Concurrent Alarm Handlers

## New Tracking Entry

Manitou will create a new tracking entry if the alarm falls outside the Priority range for an Operator.

### Example:

Operator A is tracking Company ABC and has a Priority range of 4-7.

Operator B can work alarms with a range of 1-3 and receives a Priority 2 alarm for Company ABC. Operator B selects tracking for this alarm.

A new tracking entry will be created because this Priority level is outside the original tracking instance created by Operator A.

## Additional Functions within Alarm Handling

Several other functions can be performed within the [Alarm Handling](#) form. These additional functions are used to manage requests and customer needs.



## Manual Signals

There are times when it is necessary to send a manual signal through Manitou in order to restore an unrestored event or to generate an event for tracking within a customer record.

### Creating Manual Signals


1. Select the **Tools** pull-down menu/**Manual Signal**, or press <4> on the keyboard.

Customer

 Customer ID:  


Name:

Transmitters




Number	Description	Transmitter ID	RL Prefix
1	test		

Signal Time

 ☒ Use Current Time  
☐ Specify Time Date:  Time:

Manual Signals

 Monitoring Group:


	Event	Description	Area	Zone	Sensor	User ID	Point ID
*							

Send Signal - F5

Manual Signal

2. Enter the Customer ID or search for the Customer using the Find Customer feature.
  - Select the appropriate search criteria (Search Key 1, 2...) and the Value associated with the search (what to look for)
3. Select the **Transmitter** the alarm will be sent on
  - If only one transmitter is present in the list, it will be selected automatically
4. Designate **Signal Time**

- Use either the current time or a specific time.

 *If the alarm needs to show as occurring in the past, this can be designated as well; however, this can only be done for the recent past, not days or weeks ago.*

5. Identify the Monitoring Group to which you want to send the event.
6. Populate the information for the Event.
7. Select an **Event** from the pull-down menu
8. The **Description** auto-populates off the **Event** selection
9. **Area, Zone, Sensor** and **User ID** are selected using the available pull-down menus
10. Input **Point ID** - ID given to specific devices within a specific area or zone, if necessary (can be up to 49 characters in length)
11. Click **Send Signal**, or press <F5> on the keyboard.

## FEP Manual Signals

It is possible to send a signal through the Front End Processor (FEP) in order to emulate the signal passing through the Receiver. To create an FEP Manual Signal, it is necessary to first collect the "raw" signal from the Customer Activity or Raw Data Log.

### Collecting Raw Data

Collecting a raw signal from the system can be done two ways:

#### Raw Data Log

1. From the **Tool** pull-down menu, select **Raw Data Log**.
2. If the event is not already present in the log, select the date range to search for it and click the **Search** button.
3. Once the event is located, double-click to bring up the *Log Details* screen.
4. Highlight and copy the information found in the *Event Data* field, using <Ctrl> + <C> or right-clicking and selecting **Copy**.

#### Customer Activity

1. From the Customer screen, select Activity Log from the Jump To menu.
2. Double-click on the event to bring up the *Log Details* screen.
  - If the event does not show in the current list, a search option available on the

**Filter** tab located at the bottom of the screen.

3. Highlight and copy the information found in the *Raw Data Code* field, using **<Ctrl> + <C>** or right-clicking and selecting **Copy**.

## Creating the FEP Manual Signal

Once the raw data information has been copied to the clipboard, the manual signal can be created.

1. Open the *Manual Signal* form, or press **<F4>** on the keyboard.
2. Select the *FEP Manual Signal* tab located at the bottom of the form.

3. Select the active **FEP No** and applicable **Receiver No**.
  - The Receiver and FEP details can also be gathered from the *Log Details* screen accessed through the [Raw Data Log](#) or [Customer Activity](#).
4. Paste the raw data from the clipboard to the **Manual Signal** field.
5. Click **Send Signal**, or press **<F5>** on the keyboard.

## On Test

### Put an Account On Test

There are times when an alarm arrives while a technician is testing an account. Upon validation, Operators may put the account temporarily On Test from the *Alarm Handling* screen.



On Test screen

1. Access the *On Test* screen:

- From the *Alarm Handling* form, click the **Operation** button at the top of the window, or type [O], on the keyboard. Then select **On Test** from the list, or type <O> on the keyboard again.
- From the main menu, click the **Operations** pull-down menu (at the top of the application screen), and select **On Test** from the list.

2. Click the **Add** button or press <Alt+A> on the keyboard.

3. When prompted, select an option to pre-fill alarm-specific information for this *On Test* record:

- **Yes**, if it is necessary to place this one *exact* event On Test
- **No**, if more than this *exact* event will be placed On Test

4. Fill out the fields in the *Duration* section:

- Select type of On Test
  - **Temporary On Test** is automatically selected and is used for the majority of On Test situations; this type expires based on date/time provided.
  - **Permanent On Test** is primarily used in extreme situations such as extensive damage, facility down, construction, etc. and does not expire.
- Reason
  - Limit of 79 characters for this field.

- Fill out fields to designate time limit
5. Fill out the Details section:
    - Specify whether the **Whole Customer** is On Test or only **Selected Components** by clicking
      - If selecting only specific components, must select System first.
  6. Click Save or **<Ctrl+S>**.
  7. The scheduled test will show up in the grid and will be highlighted either pink (current) or green (future). Any tests previously conducted that have already expired will show up in grey.
- To return to a previous screen, select from the Navigation tree or button ribbon, or close the *On Test* form by using **<Ctrl+F4>**.

Once the time has expired on the On Test, the system will automatically return the account "to Service".

## Manually Returning an Account to Service

In instances where an account has been placed on Permanent On Test or an account needs to be active prior to expiration of the On Test, the account can be taken out of On Test manually.

There is no automatic expiration for an account placed on Permanent On Test. The test must be removed from the grid within the *On Test* form to return the account to active status.

1. Access the *On Test* screen:
  - From the *Alarm Handling* form, click the **Operations** button at the top of the window, or type [O], on the keyboard. then select **On Test** from the list, or type **<O>** on the keyboard again.
  - From the main menu, click the **Operations** pull-down menu (at the top of the application screen), and select **On Test** from the list.
2. If necessary, load the *Customer ID* or search for the customer record.
3. Validate the password.
4. Select the line(s) to remove (a black arrow will display to the left of the scheduled event) then click the **Remove** or the **Remove All** button.

5. Enter a return to service comment.
6. Click **OK**.

## On Test Status

The On Test Inquiry provides an Operator with a read-only list of all On-test entries that are on record in the Manitou system.

1. Select the **Operations** menu.
2. Select **On Test Status**. The following form displays:

On Test Status window

The following information is displayed:

- **Contract No.** - the customer's Contract Number
- **Name** - the customer's or company's Name
- **Type** - the Type of On Test period - Temporary or Permanent
- **From** - the beginning date and time of the on test period
- **To** - the ending date and time of the on test period
- **Details** - information about which parts of the system are on test (or "Whole System")

## Color Coding


- Current On Test accounts are shown in red
- Expired accounts are shown in grey
- Future On Test accounts are displayed in green

Customer ID, Name and Type columns can be sorted, and dates are presented in customer local times.

- To refresh the list, click on the **Refresh** button. 

## Pre-Cancel

When a customer trips an alarm on accident, or knows an alarm will be triggered, they may call to cancel the alarm. To counteract this, the Manitou system allows the ability to create a Pre-Cancel event to notify any Operator managing that account's alarms. When created, the Pre-Cancel warning is sent to the alarm handler.

 *Pre-Cancel warnings can be sent out/received while the alarm is in process or upon alarm receipt.*

1. Go to the **Operations** pull-down menu/**Pre-Cancel Alarms**.
2. If necessary, load the *Customer ID* or search for the customer record.
3. Select a Resolution Code from the drop-down list.

Code	Description
AC	Actual Alarm
AU	Closed by Auto Client
CM	Company Caused
CU	Customer Caused
EQ	Equipment Caused
NF	No Fault Found
PW	Power Loss

Pre-Cancel Resolution Codes

4. Fill in the Comment and Instructions field.
5. Click **Add**.

The Pre-Cancel notification is now visible in the *Pre-Cancel Data* grid.

## Removing a Pre-Cancel notification

There may be an instance that a Pre-Cancel alert is incorrect or should otherwise be removed.

1. To remove a Pre-Cancel alert, click on the Pre-Cancel notification so that the black arrow is visible to the left of the row.

	Contact Name	Valid Pwd	Time Called In
▶	Bold Technologies	Valid	04/02/2012 15:25:45

2. Press **<Delete>** on the keyboard.
3. Click **Yes** when prompted to confirm the deletion, or **No** to cancel action.

## Temporary Comments

Sometimes when a contact is made, the customer provides additional information pertinent to their account. Examples of this may be a customer going on vacation or scheduled construction on the property. These situations call for the creation of a Temporary Comment.

1. From the **Actions** menu within the *Alarm Handling* form, select **Temporary Comment** (or press <A> then <T> on the keyboard).
2. Validate the password used to log on to the system and click **Enter**.
3. Enter a description for the temporary comment and select the **Comment Type**; click **OK**.

4. Enter the additional specifics for the comment:

Show On Open form

- **Show On Open** - when to show the temporary comment
  - **Valid From/To** - dates and times through which the comment will be valid; if the comment does not apply to Automatic Actions, select **Ignore Comment** from the *Auto-Client* drop-down box.
  - **Auto Purge** - whether or not the comment will be purged once expired
  - **Follow Up** - date and time to follow up
5. Enter the *Comment* details in the space provided.

- Click the **Save** button at the top of the screen and confirm to return to the *Alarm Handling* screen.

## Remove a Temporary Comment

- To remove a temporary comment prior to expiration, select the comment from the list available on the left of the *Temporary Comment* form and click the **Remove** button. Upon confirmation, the comment will be deleted.

## Temporary Schedules

When managing a schedule exception event, such as an *Unscheduled Open* or *Late to Close*, it is possible to update the *Open/Close* schedule temporarily based on the customer's feedback.

### Creating a Temporary Schedule

A normal *Open/Close* schedule must have been configured for the customer prior to setting up a temporary schedule. To configure a normal *Open/Close* schedule or for more information on Temporary Schedules, see the [Data Entry: Add A Customer, Schedules](#) portion of this manual.

- From the *Actions* menu within the *Alarm Handling* form, select **Temporary Schedule** (or press <A> then <S> on the keyboard).
- Validate the system password.
- Select the applicable date to change the schedule (the current date loads by default).

Temporary Schedule			
	Day	Time	Action
▶	Tue	08:30	May Open
	Tue	09:00	Must Open

Temporary Schedule table

- Update the applicable schedule lines.
- Click the **Save** button and confirm to return to the *Alarm Handling* form.

## Modify or Delete a Temporary Schedule

It is also possible to edit or remove an existing Temporary Schedule from an account. For more information on schedules, see [Data Entry: Add A Customer, Schedules](#).

- Load the customer record by entering the **Customer ID** or searching for the Customer ID using the search function.
- Click on the **Edit** button at the top of the screen.

3. Enter the date of the *Temporary Schedule* that should be edited or deleted.
4. To edit the schedule, click in the relevant fields of the *Temporary Schedule* table and edit or add rows as necessary.
5. To delete a row, click next to the row to be deleted.

Temporary Schedule			
	Day	Time	Action
	Mon	08:00	May Open/Close
	Mon	17:00	Must Close

Temporary Schedule, selected row

6. To remove, press the **<Delete>** key on the keyboard and confirm.
7. Continue deleting necessary rows. Once the temporary schedule has been deleted, the permanent schedule will appear.
8. Click **Save** to save all changes.

## Disaster Mode

At times, a central station may run into problems that affect the ability to perform necessary duties. Such instances may be severe weather or catastrophic conditions which affect the monitoring area and causes problems with false or multiple alarms sent at a rapid rate. Setting Manitou to Disaster Mode allows the central station to change the way alarms are received and processed, and will allow Operators to reassign priorities for event alarms, customize the system to log certain signals, filter the signals from the affected monitoring area to a specific Operator or group of Operators, or suspend activity.

### Set up Disaster Mode

1. Select **Disaster Mode** from the **Operations** pull-down menu.
2. Click the **Edit** button located at the top of the *Disaster Event* form.

View New Edit Delete

Add Remove

Disaster Events

Disaster Event

☐ Warning ☐ Watch

Description:

Comments:

Disaster Details

Post Code	Start	End	City	Mon Grp
-----------	-------	-----	------	---------

Detail View

Disaster Mode setup

3. Click on the **Add** button above the *Disaster Events* node tree. An *Add New Disaster Event* window will appear.



**Add New Disaster Event**

Disaster Event

☒ Warning ☐ Watch

Description:

Comments:

Post Code Details

Monitoring Group:

Days:  Hours:  Minutes:

From:

To:

Post Codes

☒ City ☐ Post Code

Country:

Region:

City:

> < >> <<


OK Cancel

4. Designate if the event is a **Warning** or a **Watch**.
  - Watch does not trigger any action and is used to broadcast a potential concern
  - Warning will generate actions based on Disaster Mode settings
5. Enter a brief description into the **Description** field - this is required.


*📁 If the **Description** field is not populated, clicking the **OK** button will not process the Disaster Mode event.*
6. Enter any comments into the **Comments** field.
7. Ensure the **Monitoring Group** is set to the default Monitoring Group 0.
8. Enter the number of **Days**, **Hours** and **Minutes** for this event. The **From** and **To** fields

will automatically populate based off this information. However, should the event need to be scheduled for some time in the future, click the down arrow and select a date from the calendar, or type a date directly in to the **From** field.

9. Select the location(s) affected by either **City** or **Post Code**
10. Choose **Country** and **Region**.
11. Highlight each city to be covered by the Watch/Warning and click the **right single arrow** to move it to the coverage list or use the **right double arrow** to move the entire **City** list.

 *The single and double left arrows will remove items from the coverage list.*

12. Once the list is populated, click **OK**.

 *Customer logs do not log signals as "Disaster." It is necessary for an Operator to double-click individual lines in the Log to view Disaster flags.*

## Edit a Disaster Mode Event

To change the time or duration of a disaster mode event or to adjust the notes, quick edits are available within the *Disaster Mode* form.

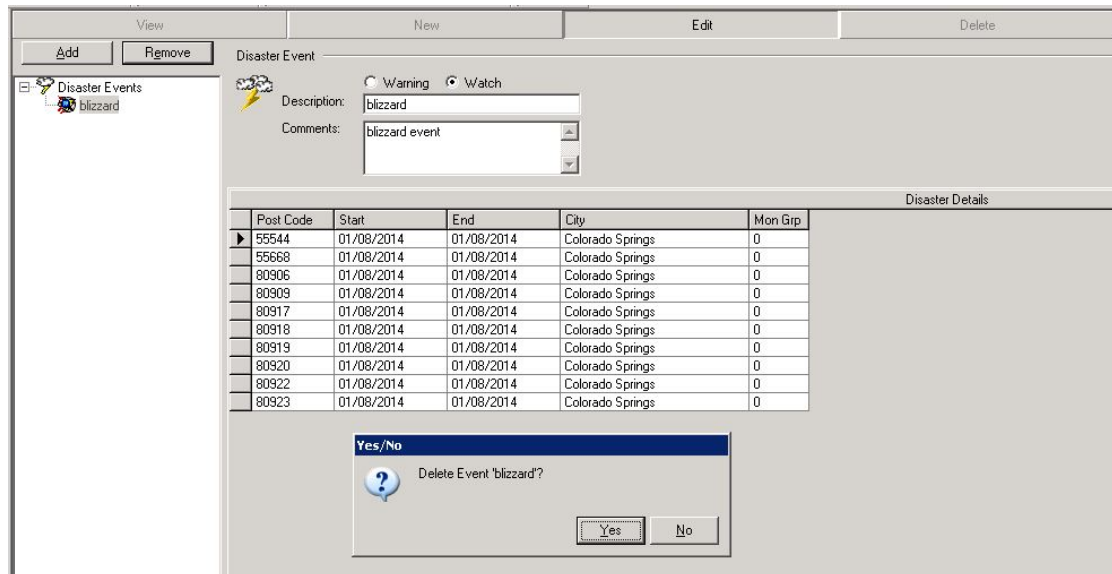
1. Select **Disaster Mode** from the **Operations** pull-down menu.
2. Click on the appropriate event from the *Disaster Events* node tree.
3. From the resulting list, highlight an item by clicking on it.
4. To edit the **Description** or **Comments** field in the *Post Code Details* section, click and begin typing.
5. Click the radio buttons to change the **Warning** or **Watch** designation.
6. Click the appropriate arrows in the **From** and **To** fields to adjust the dates and times of the event.
7. Once all edits have been made, click **Apply** to save the changes.

## Remove a Disaster Mode Event

Once a disaster event has expired or ended, it can be removed from the *Disaster Event* list.

1. Select **Disaster Mode** from the **Operations** pull-down menu.
2. Click on the appropriate event from the *Disaster Events* node tree.
3. From the resulting list, highlight an item by clicking on it.

4. Click the **Remove** button.
5. From the prompt, select **Yes** to remove the event, or **No** to cancel the action.



## Reporting

Reporting can play a vital role at a central station, providing many different types of reports on a daily, weekly, monthly and periodic basis. Report functions in Manitou can include enabling one or more reports to be selected, queued, previewed, printed or sent to a nominated recipient by e-mail or fax.

The Reports function enables users to generate reports on an as-needed basis, such as a request from a Customer or Dealer. Reporting works along with the Report Scheduler and Publisher applications in Manitou, which generates and distributes reports on an automatic basis according to pre-determined criteria.

The following options are accessible from the *Reports* pull-down menu:

- [System Reports](#)
- [Report Queue](#)

## Reports

The System Reports function is a tool used for running reports on various Manitou system aspects, such as alarm detail, user statistics, number of customers added or deleted during a specific date range, or customer activity. These reports can be scheduled to run at certain time intervals and have the option to be e-mailed, faxed or printed.

Initially, when displaying the System Reports, the default page shows the first step in the

reports process. On the left hand side of the screen is a list of the available reports. After selecting a report from the reports list, the search criteria and parameters available to each report are shown on the right.

The screenshot displays the 'Alarm Cause Summary' report configuration interface. On the left, a tree view under 'Activity' lists various reports, with 'Alarm Cause Summary' selected. Below this, other categories like 'Custom', 'Maintenance', 'Master File', and 'System' are visible. A red arrow points to this list, labeled 'Reports List'. The main area on the right is titled 'Alarm Cause Summary' and contains several sections: 'Report Description' (set to 'Alarm Cause Summary') and 'Priority' (set to '6'); search criteria fields for 'Customer ID', 'Customer name', 'Dealer ID', 'Authority ID', 'Branch ID', 'Group', and 'Class'; a 'Date' range selector (05/18/2012 to 06/18/2012); a 'NACOSS Events Only' checkbox; 'Alarm Type' (False, Genuine, Both) and 'Dispatched' (All, Dispatched, Not Dispatched) radio buttons; 'Group by' options (Customer ID, Customer Name, Dealer, Branch, Authority, Event Category); and 'Authority types required' (Police, Fire, Medical) checkboxes. Red arrows point to the 'Options...' and 'Advanced...' buttons, labeled 'Report Parameters'.

Report Example

## Report Options

There may be times when Options or Advanced features for a report may need to be designated. These two buttons are located on those report forms they pertain to and provided additional selections to choose from while generating a report.

Report Options Example

**Options** and **Advanced** selections vary from report to report and may not be present at all for certain types such as *Alarm Detail by Number* report or only contain one or the other, such as the **Advanced** button on the *Handled Signal by Operator* report.

Please note that checking all categories is the same as unchecking all categories. In order to keep the parameter list as short as possible, when all items of a particular category are selected, 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.

## Schedule Reports

From the *Customer Reports* screen, Users can add and schedule reports to be periodically generated and sent from Manitou to the Branch.

1. From the [Customer record](#) main view, click **Reports** from the Jump To menu.
2. Click **Edit** button on the top of the screen, then the **Add New** button on the top-right. The *System Reports* screen will appear.
3. Select the desired report from the *Reports List* on the left.
4. Within the *Reports* page, select the parameters including any **Options** or **Advanced**.
5. Once all report parameters have been checked, click the **Next** button located at the

lower right of the screen.

6. Within the *Distribution* page, select the distribution method and destination for the report.

A number of options are available. Uses can:

- View on screen, using the preview facility.
- Print locally (in the central station), with an option to preview first.
- Send to a nominated customer or dealer, with an option to review first.
- Send to any individual (whether on the system database or not) by email or fax, also with an option to preview.

The screenshot shows the 'Reports Destination Window' with the following sections:

- Override or unlisted destination:**
  - Override recipient's name: [Text Field]
  - Override destination type: [Dropdown Menu]
  - Override destination address (Fax/Email): [Text Field]
  - [Add to list] Button
- Contact list destination:**
  - Default printer: [Dropdown Menu]
  - Contact list type: [Dropdown Menu, set to 'Customer']
  - Customer: [Text Field, set to 'BOLDTECH'] [Search Icon]
  - ☐ Show suppressed contacts
- Contacts List:**
  - Tree view showing:
    - Contacts
      - Rod Coles
      - Bob Bishop
    - Dealer
      - Bold Group Main Cluster
      - Branch
      - Agency
    - Authority
      - Colorado Springs Police Department
      - Colorado Springs Fire Department
      - Colorado Springs Medical Emergency Services
    - Customer
      - Bold Technologies Ltd
  - Navigation buttons: >, <, >>, <<
  - Preview area: [Empty Box]

Reports Destination Window

7. Click **Next**.
8. Designate the schedule for the report, including the next run as well as interval on the *Schedule your report* page.
9. Click **Finish**.

☛ Use the **Back** button to go back and make edits to data on different pages for the

report schedule. Clicking on the previous tabs at the bottom of the screen will result in configurations lost on the .

- For more information on printing, sending and previewing reports, see the [Reports: Run a System Report](#) section of this manual.

## Generate and Publish a System Report

1. Select **System Report** from the **Reports** pull-down menu.
2. Select the desired report from the Reports List on the left.
3. From the *Reports* form, check the **Report Description**. This may be changed as preferred within the 64-character limit field.
4. Confirm the **Priority** level of the report. Manitou will use this number to determine which reports in the report queue to print first - the lower the number, the higher the priority. Unless urgent, this number should be set to 6.
5. Enter any relevant search criteria, including any **Options** or **Advanced**.
6. Click **Next**.
7. Within the *Distribution* page, select the distribution method and destination for the report.

A number of options are available. Uses can:

- View on screen, using the preview function.
  - Print locally (in the central station), with an option to preview first.
  - Send to a nominated customer or dealer, with an option to review first.
  - Send to any individual (whether on the system database or not) by email or fax, also with an option to preview.
8. To complete the report and define its destination, please refer to one of the following publication sections:
    - [Preview a System Report](#)
    - [Print a System Report](#)
    - [Send a System Report to Customer or Dealer](#)
    - [Send a System Report via Email or Fax](#)

## Preview a System Report

1. Select the desired report from the reports list.
2. Check the Priority level of the report. Manitou will use this number to determine which reports in the report queue to print first - the lower the number, the higher the priority. Unless urgent, this number should be set to 6.
3. Enter any relevant search criteria.
4. Click **Next**.
5. In the Distribution page, check the Hold for Preview button.
6. Click **Next**.
7. A warning message will now be displayed that the user has not chosen any recipients for your report. Click **Yes** to queue the report for previewing only.
8. Open the Report Queue.
9. Double-click on the Report to view the previewed report.

## Print a System Report

1. After the desired report has been selected, click **Next**.
2. In the Contact List Destination area, select Printer from the drop-down Default Printer menu.
3. In the Contact List Type field, select Company
4. If the user wishes to preview the report on screen before printing, check the Hold for preview box.
5. Click **Finish** to queue the chosen report. The report will now be queued for publishing.



Override or unlisted destination:

Override recipient's name:

Override destination type:

Override destination address (Fax/Email):

Add to list

Contact list destination:

Default printer:

Contact list type:

Customer:

☐ Show suppressed contacts

☐ Hold for preview

Contacts

- Jim Smith
- Jeff Taylor
- Printer
- Fred Jones
- Bob Bishop
- Printer

Dealer

- Bold Complex
- Branch
- Agency

Authority

- Colorado Springs Police Department
- Colorado Springs Fire Department
- Colorado Springs Medical Emergency


Jeff Taylor - Printer ()

Bob Bishop - Printer ()

Contact List Destination

## Send a System Report

### Send to a Customer or Dealer

1. After the desired report has been selected, click Next.
2. In the Contact List Type field, select Customer or Dealer as appropriate.
3. In the Customer field, click the search button to the right of the field.
4. Type a \* in the Customer or Dealer search field.
5. Select the customer or dealer from the results list by clicking Load.
6. Select the specific keyholder or contact from the left hand pane and then click the include arrow. 
7. If the user wishes to preview the report on screen before printing, check the **Hold for preview** box.

The screenshot shows a software interface for overriding or unlisting a destination. It is divided into two main sections: 'Override or unlisted destination' and 'Contact list destination'.

**Override or unlisted destination:**

- Override recipient's name:** Kevin Smith
- Override destination type:** E-Mail (dropdown menu)
- Override email address:** kevin.smith@movies.com
- Email attachment type:** PDF (dropdown menu)
- Add to list** button

**Contact list destination:**

- Default printer:** (empty dropdown menu)
- Contact list type:** Company (dropdown menu)

Below these sections are two checkboxes: ☐ Show suppressed contacts and ☐ Hold for preview.

The **Show suppressed contacts** section displays a tree view of contacts:

- Contacts
  - Bill
    - Printer
  - Central Station
    - Printer
  - Company (printer only)

The **Hold for preview** section displays a list of items:

- Kevin Smith - E-Mail (kevin.smith@movies.com) (PDF)
- Central Station - Printer ()

Navigation buttons (back, forward, and search) are located between the two lists.

Show suppressed and Hold for preview options

8. Click **Finish** to queue your chosen report. The report will now be queued for publishing.

## Send by Email or Fax

Utilizing this option will allow a report to be sent to a client who has not been entered into the Manitou database.

1. After the report has been selected, click Next.
2. In the Override Recipient's Name field, type the name of the recipient for the report.
3. In the Override Destination Type field, select either e-mail or fax.
4. In the Override Email Address or Override Fax Number field, enter the full e-mail address or fax number.
5. Click the **Add to list** button.
6. If the user wishes to preview the report on screen before printing, check the hold for preview box.

7. Finally, click Finish to queue the chosen report. The report will now be queued for publishing.

The screenshot shows a software window titled "Send a System Report by Fax or E-mail Window". It is divided into several sections. The top section, "Override or unlisted destination:", includes fields for "Override recipient's name:", "Override destination type:" (a dropdown menu), and "Override destination address (Fax/Email):", followed by an "Add to list" button. The middle section, "Contact list destination:", includes fields for "Default printer:" (a dropdown menu showing "Printer") and "Contact list type:" (a dropdown menu showing "Company"). Below this is a checkbox labeled "Hold for preview". The bottom section features a list box on the left containing "Contacts", "Bill Fox", "Central Station", and "Company (printer only)". To the right of the list box are four navigation buttons: ">", "<", ">>", and "<<". At the bottom right of the window are "Back" and "Finish" buttons.

Send a System Report by Fax or E-mail Window

## Activity Reports

The *Activity Reports* section contains the reports that apply to various types of activity within the system.

### Alarm Cause Summary

The *Alarm Cause Summary* report provides details regarding a summary of what caused alarms - i.e. 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.

Users can enter various search criteria into the fields provided in the *Alarm Cause Summary* window.

Alarm Cause Summary

Report Description:  Priority:

From :  To :

Customer ID

Customer name

Dealer ID

Authority ID

Branch ID

Group

Class

☒ Date

☐ NACOSS Events Only

Options...

Alarm Type ☐ False ☐ Genuine ☒ Both

Dispatched ☐ All ☒ Dispatched ☐ Not Dispatched

Group by ☒ Customer ID ☐ Customer Name ☐ Dealer ☐ Branch ☐ Authority ☐ Event Category

Advanced...

Authority types required

☒ Police ☒ Fire ☒ Medical

Alarm Cause Summary Report form

The report may be run by **Customer, Dealer, Authority, Branch, Group** code, or **Class** code. It may then require all or only one or two authority types. Subsequently, the report may be selected by alarm resolution type of false or genuine and dispatched, not dispatched or both. The report may also be grouped by **Customer, Dealer, Branch, Authority** and **Event Category**.

### Summary Search Options

Clicking on the **Options** button at the bottom right corner of the *Alarm Cause Summary* screen will bring up additional search options.

**Alarm Cause Summary Options**

Alarm Cause Summary

Event Codes:

- ☒ \*\* Unknown Event
- ☒ \*1 GSM Link Fail
- ☒ \*2 GSM No Response
- ☒ \*3 Land Line Link Fail
- ☒ \*4 Land Line No Respons
- ☒ \*5 GSM Resp OK
- ☒ \*6 Land Line Resp OK
- ☒ \*7 GSM Remote Link Fail

Event Categories:

- ☒ Access Alarms
- ☒ Answering Service
- ☒ Burglary
- ☒ Emergency
- ☒ Environmental Alarms
- ☒ Fire Alarm
- ☒ General Alarms
- ☒ Holdup / Personal Attack

Monitoring status:

- ☒ Pending
- ☒ Inactive
- ☒ Active
- ☒ Deactivated

Resolution Codes:

- ☒ Group 1
  - ☒ AC Actual Alarm
  - ☒ AU Closed by Auto Client
  - ☒ CM Company Caused
  - ☒ CU Customer Caused
  - ☒ EQ Equipment Caused
  - ☒ NF No Fault Found
  - ☒ PW Power Loss

Customer types:

- ☒ Commercial
- ☒ Residential

OK Cancel

Alarm Cause Summary Options form

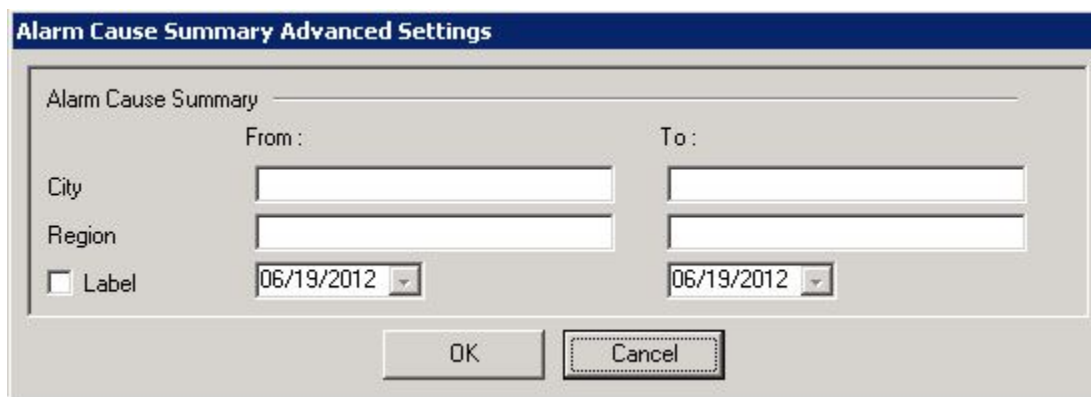
The search options are divided into five categories. All options are checked by default as this is the recommended setting.

- **Event Codes** – use this to select only the events required
- **Event Categories** – use this to narrow the scope of the events to the category of alarm/signal events
- **Monitoring status** - filter by event status
- **Resolution Codes** – will select the alarms with the specified resolution codes
- **Customer types** – will select only the customers of the selected type(s)

Once the search parameters are set, click **Next** to continue running the report.

### Advanced Summary Search Options

Also on the lower-right of the *Alarm Cause Summary* screen is the **Advanced** button. The *Advanced Settings* screen provides additional advanced search options to narrow the search results to a particular range of **City**, **Region** and **Date**.



**Alarm Cause Summary Advanced Settings**

Alarm Cause Summary

From : To :

City [ ] [ ]

Region [ ] [ ]

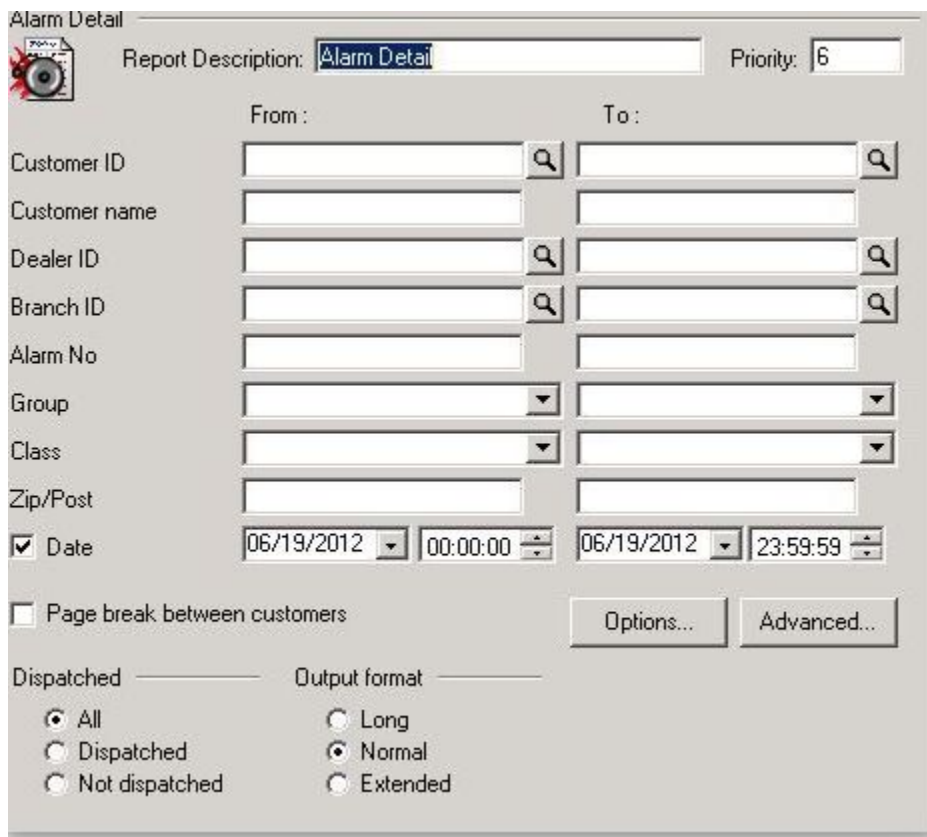
☐ Label 06/19/2012 06/19/2012

OK Cancel

Alarm Cause Summary Advanced options form

## Alarm Detail

The *Alarm Detail* report contains the alarm activity details for a single or multiple customer records. When run with the default settings, the *Alarm Detail* report groups by Customer and lists each alarm in sequential order.



**Alarm Detail**

Report Description: Alarm Detail Priority: 6

From : To :

Customer ID [ ] [ ]

Customer name [ ] [ ]

Dealer ID [ ] [ ]

Branch ID [ ] [ ]

Alarm No [ ] [ ]

Group [ ] [ ]

Class [ ] [ ]

Zip/Post [ ] [ ]

☒ Date 06/19/2012 00:00:00 06/19/2012 23:59:59

☐ Page break between customers

Options... Advanced...

Dispatched Output format

☒ All ☐ Long

☐ Dispatched ☒ Normal

☐ Not dispatched ☐ Extended

Alarm Detail Report form

## Detail Search Options

Clicking on the **Options** button at the bottom right corner of the *Alarm Detail* screen will

bring up additional search options.

**Alarm Detail Options**

Alarm Detail

Event Codes:

- ☒ \*\* Unknown Event
- ☒ \*1 GSM Link Fail
- ☒ \*2 GSM No Response
- ☒ \*3 Land Line Link Fail
- ☒ \*4 Land Line No Respons
- ☒ \*5 GSM Resp OK
- ☒ \*6 Land Line Resp OK
- ☒ \*7 GSM Remote Link Fail

Event Categories:

- ☒ Access Alarms
- ☒ Answering Service
- ☒ Burglary
- ☒ Emergency
- ☒ Environmental Alarms
- ☒ Fire Alarm
- ☒ General Alarms
- ☒ Holdup / Personal Attack

UL Grades

- ☒ Unassigned
- ☒ CSBG
- ☒ CSF
- ☒ PRPB
- ☒ PRPF

add...

Resolution Codes:

- ☒ Group 1
- ☒ AC Actual Alarm
- ☒ AU Closed by Auto Client
- ☒ CM Company Caused
- ☒ CU Customer Caused
- ☒ EQ Equipment Caused
- ☒ NF No Fault Found
- ☒ PW Power Loss

Customer types:

- ☒ Commercial
- ☒ Residential

Monitoring status

- ☒ Pending
- ☒ Inactive
- ☒ Active
- ☒ Deactivated

Group by

- ☒ Customer
- ☐ Dealer
- ☐ Branch

Order by

- ☒ Customer ID
- ☐ Customer Name

OK Cancel

Alarm Detail Report Options form

The search options are divided into six categories. All options are checked by default as this is the recommended setting.

- **Event Codes** – use this to select only the events required
- **Event Categories** – use this to narrow the scope of the events to the category of alarm/signal events
- **UL Grades** - enables filtering by UL grade; clicking the Add button below the category will allow a Us
- **Resolution Codes** – will select the alarms with the specified resolution codes

- **Customer types** – will select only the customers of the selected type(s)
- **Monitoring status** - filter by event status

Once the search parameters are set, click **Next** to continue running the report.

### Advanced Detail Search Options

Also on the lower-right of the *Alarm Detail* screen is the **Advanced** button. The *Advanced Settings* screen provides additional advanced search options to narrow the search results to a particular range of **City**, **Region** and **Date**.

The screenshot shows the 'Alarm Detail Advanced Settings' dialog box. It features a tabbed interface with the 'Alarm Detail' tab selected. The dialog is divided into two main sections: 'From :' and 'To :'. Each section contains a series of input fields for filtering search results. The 'From :' section includes fields for City, Region, Label 1, three checkboxes (CheckBox 1, 2, 3), Label 2, Label 3, a date field (01/08/2014), and two more checkboxes. The 'To :' section includes corresponding empty fields for City, Region, Label 1, Label 2, Label 3, and a date field (01/08/2014). At the bottom of the dialog are 'OK' and 'Cancel' buttons.

### Report Results

- Customer information, including Contract number and Address.
- Alarm Number, this is a combination of the database serial number assigned to this record and the sequence number of the alarm assigned to it when the alarm arrived.
- User ID information of the person that handled the alarm.
- Alarm date and time plus the reset date and time.
- UL information when applicable.



- Activity from the alarm handling process.
- If persons or authorities were contacted during the alarm handling process the contact details will list after the activity. This will detail the initial contact, the date and time when the authority or person arrived on site and if/when the alarm was cleared.

## 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. In order to correctly run this report, the Operator must know the Alarm Number.

### Locating the Alarm Number

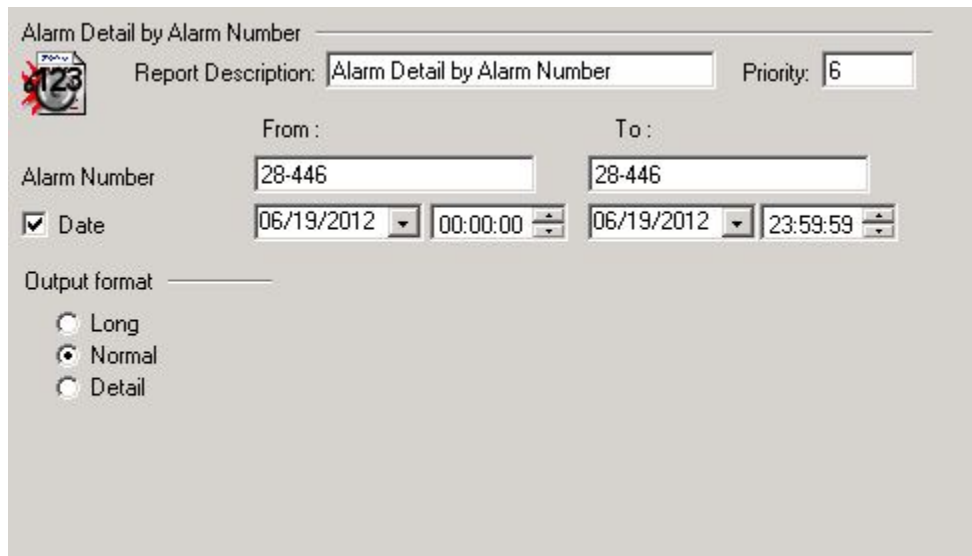
The alarm number is a unique number assigned by Manitou made up of the Serial Number of the Customer Record followed by a dash then the Log Sequence Number.

1. Open the [Customer Record](#) for the alarm.
2. Click the [Activity Log](#) radio button from the Jump To menu.
3. Locate the alarm in the log and double-click to open.
4. The Alarm Number is made up of the **Serial Number** and the **Log Sequence No.** separated by a dash. In the example below, the Alarm Number for this alarm is: 28-445.

Log Details		
	Item	Value
▶	Serial No.	28
	Log Sequence No.	445
	Event No.	442
	Record Type	Detail
	Date/Time	06/19/2012 14:39:09
	Event	COMMENT - a
	User ID	BOLD
	Manual Record	False
	Event Type	Comment
	Source of Event	0 - Operator
	Text	a
	Hidden	0
	Receiver Line Prefix	
	TX ID	

Log Details - locating the alarm number

With the *Alarm Detail by Alarm Number* report, a user can specify an Alarm Number and date range as well as Output format.



Alarm Detail by Alarm Number

Report Description: Alarm Detail by Alarm Number Priority: 6

Alarm Number: 28-446 From: 28-446 To: 28-446

☒ Date 06/19/2012 00:00:00 06/19/2012 23:59:59

Output format

☐ Long ☒ Normal ☐ Detail

Alarm Detail by Alarm Number form

## 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.

### Fields and Options

- **Report Description** - A label for the report.
- **Priority** - The alarm priority level for which you want to run the report.
- **Date** - Select this check box to specify a date range.
- **From/To** - Use these fields to enter a date/time range for the report.
- **Include Details** - Select this check box to include details for all alarms over that section's tolerance in the report. Selecting this option only adds alarms that exceed the tolerance to the **Details** section.
- **High Priority** - For example, duress, hold-up, defaulted to 1 minute.
- **Asset Threatening** - For example, intruder, defaulted to 3 minutes.
- **Subsistence Alarms** - For example, battery low, defaulted to 20 minutes.
- **Low Priority** - For example, late-to-close, mains fail, defaulted to 60 minutes.
- **Group Labels** - You can use these text boxes to rename section labels in the report.
- **Monitoring Status** - You can select which accounts should be included in the report.

Alarm Grading

Report Description:  Priority:

From:   To:

☒ Date

☒ Include details

Tolerance (seconds)

High Priority

Asset Threatening

Subsistence Alarm

Low Priority

Group Labels

High Priority

Asset Threatening

Subsistence Alarm

Low Priority

Monitoring status

☒ Pending

☒ Inactive

☒ Active

☒ Deactivated

Options...

In the **Options** dialog for this report, there are lists for each of the categories, allowing you to choose which Event Codes go into each report.

Alarm Grading Options Settings

Alarm Grading

High Priority

Asset Threat

Subsistence

Low Priority

☐ 12 manual test

☐ 11 Receiver Trouble

☐ 10 Auto Mode

☐ 09 Unknown Condition

☐ 08 Manual Mode

☐ 07 Line Fault

☐ 06 Line No Response

☐ 05 Line/OK / Restore

☐ 04 Test

☐ 03 Line Card Fault

☐ 02 Line Card OK

☐ 01 Listen In On

☐ 00 Listen In Off

☐ 00 Computer Fault/Res

☐ 00 Data & Time Reset

OK Cancel

This report is measuring time available to time first viewed.

When this report is run, it finds all the events within the time period specified, and for each category, lists the tolerance for that category, the total number of events for that category, how many and the percentage of events were viewed under the time tolerance, and how many and the percentage of events that were viewed over the time tolerance.

## 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.

Users can enter various search criteria into the fields provided in the *Alarm Resolution* window.

Alarm Resolution

Report Description:  Priority:

From :  To :

Customer ID

Customer name

Dealer ID

Branch ID

Group

Class

Authority ID

☒ Date

Resolution Codes: ☒ Group 1

- ☒ AC Actual Alarm
- ☒ AU Closed by Auto Client
- ☒ CM Company Caused
- ☒ CU Customer Caused
- ☒ EQ Equipment Caused
- ☒ NF No Fault Found
- ☒ PW Power Loss
- ☒ UK Unknown

Monitoring status

- ☒ Pending
- ☒ Inactive
- ☒ Active
- ☒ Deactivated

Alarm Resolution form

## Resolution Search Options

Clicking on the **Options** button at the bottom right corner of the screen will bring up additional search options.

**Alarm Resolution Option Settings**

Alarm Resolution

Customer types to include: ☒ Commercial ☒ Residential

Event Codes:

- ☒ \*\* Unknown Event
- ☒ \*1 GSM Link Fail
- ☒ \*2 GSM No Response
- ☒ \*3 Land Line Link Fail
- ☒ \*4 Land Line No Respons
- ☒ \*5 GSM Resp OK
- ☒ \*6 Land Line Resp OK
- ☒ \*7 GSM Remote Link Fail
- ☒ \*8 GSM Remote Resp OK
- ☒ \*A Activation
- ☒ \*A1 Unknown Card
- ☒ \*A2 Unassigned Card
- ☒ \*A3 Unauthorized Access
- ☒ \*AX Unexpected Area
- ☒ \*B Bypass

Event Categories:

- ☒ Access Alarms
- ☒ Answering Service
- ☒ Burglary
- ☒ Emergency
- ☒ Environmental Alarms
- ☒ Fire Alarm
- ☒ General Alarms
- ☒ Holdup / Personal Attack
- ☒ Medical Alarms
- ☒ Open / Close
- ☒ Service Signals
- ☒ System Alarms

Include:

☐ Genuine alarms

☐ False Alarms

☒ Both

Summary:

☐ Detail only

☒ Detail with summary totals

☐ Summary totals only

☐ Require police

☐ Require fire

☐ Require medical

☐ Exclude police

☐ Exclude fire

☐ Exclude medical

Group by:

☒ None

☐ Dealer

☐ Branch

Order by:

☒ Customer ID

☐ Customer Name

☐ Resolution Code

☐ Authority ID

OK Cancel

Alarm Resolution Options form

The search options are divided into three categories. All options are checked by default as this is the recommended setting.

- **Customer types** – will select only the customers of the selected type(s)
- **Event Codes** – use this to select only the events required
- **Event Categories** – use this to narrow the scope of the events to the category of alarm/signal events
- Users may also choose to include genuine alarms, false alarms, or both types of alarms, as well as including or excluding specific types of authority (police, fire or medical). Additionally, Users may choose report summary options: **Detail only**, **Details with summary totals**, or **Summary totals only**.

### Advanced Resolution Option Settings

Clicking on the **Advanced** button will allow users to include additional resolution options as

well as report options.

The dialog box is titled "Alarm Resolution Advanced Settings". It contains a section for "Alarm Resolution" with two columns: "From :" and "To :". Under "From :", there are input fields for "City", "Region", and a date field set to "06/19/2012". Under "To :", there are corresponding input fields for "City", "Region", and a date field set to "06/19/2012". There is a "Label" checkbox which is currently unchecked. At the bottom are "OK" and "Cancel" buttons.

Alarm Resolution Advanced Options form

- Once the search parameters are set, click **Next** to continue running the report.

## Alarm Response

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

The form is titled "Alarm Response" and includes a "Report Description" field with "Alarm Response" entered and a "Priority" field with "6". It has two columns for search criteria: "From :" and "To :". Fields include "Customer ID", "Customer name", "Dealer ID", "Branch ID", "Group", "Class", and "User ID", each with a search icon. A "Date" checkbox is checked, with date and time pickers set to "06/22/2012" and "00:00:00" to "23:59:59". There is a "Minimum Response (seconds)" field. Under "Include details", the "Only include actioned alarms in averages" checkbox is unchecked. The "Monitoring status" section has checkboxes for "Pending", "Inactive", "Active", and "Deactivated", all of which are checked. At the bottom, "Group by" has radio buttons for "Date" and "Operator", and "Response type" has radio buttons for "First View to First Action" and "Available to First Action". "Options..." and "Advanced..." buttons are at the bottom right.

Alarm Response Report form

Populate the necessary parameters for the report and/or select a **Date** range. The report also allows for a **Minimum Response** time selection in seconds. The Alarm Response report can be grouped by **Date** or **Operator**.

The **Response Type** selection indicates what type of [Contact Action](#) was performed. By default, the report includes details such as the alarms, *Operator*, *View Time*, *First Action Time*, and *Resolution Time*. Often, the *First Action* column may be empty. If this is the case, it is because there was no contact action on the Action Pattern.

*Remember, 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.*

**First View to First Action** and **Available to First Action** are more or less the same function. The difference in the two is how long the alarm sat in the queue. If an alarm is generated and left in the queue for 60 seconds, open it and perform a contact action, the View to Action will be 60 seconds less than the Rcvd to Action. Users may choose whether to view the Response Type by either the View to Action or Rcvd to Action.

## Response Search Options

Clicking on the **Options** button at the bottom right corner of the *Alarm Response* screen will bring up additional search options.

**Alarm Response Options Settings**

Alarm Response

**Event Codes**

- ☒ \*\* Unknown Event
- ☒ \*1 GSM Link Fail
- ☒ \*2 GSM No Response
- ☒ \*3 Land Line Link Fail
- ☒ \*4 Land Line No Respons
- ☒ \*5 GSM Resp OK
- ☒ \*6 Land Line Resp OK
- ☒ \*7 GSM Remote Link Fail
- ☒ \*8 GSM Remote Resp OK
- ☒ \*A Activation
- ☒ \*A1 Unknown Card
- ☒ \*A2 Unassigned Card
- ☒ \*A3 Unauthorized Access
- ☒ \*AX Unexpected Area
- ☒ \*B Bypass

**Event Categories**

- ☒ Access Alarms
- ☒ Answering Service
- ☒ Burglary
- ☒ Emergency
- ☒ Environmental Alarms
- ☒ Fire Alarm
- ☒ General Alarms
- ☒ Holdup / Personal Attack
- ☒ Medical Alarms
- ☒ Open / Close
- ☒ Service Signals
- ☒ System Alarms

OK Cancel

Alarm Response Report Options form

The search options are divided into two categories. All options are checked by default as this is the recommended setting.

- **Event Codes** – use this to select only the events required.
- **Event Categories** – use this to narrow the scope of the events to the category of alarm/signal events.

## Advanced Response Search Options

Also on the lower-right of the *Alarm Response* screen is the **Advanced** button. The *Advanced Settings* screen provides additional advanced search options to narrow the search results to a particular range of **City**, **Region** and **Date**.

Alarm Response Advanced Options form

- Once the search parameters are set, click **Next** to continue running the report.

## Customer Activity

The *Customer Activity* report is the most used and most detailed report for obtaining customer account activity information. This report contains all alarms and signals for customer records, including the details of actions taken and comments added to the account. The *Customer Activity* report displays results by the Contract number and then by the Alarm Report number and can be generated by **Weekly Activity**, **Daily Signal and Alarm** or **Weekly Open/Close** activity.

This report differs from the [Alarm Detail](#) report, which concentrates only on the alarm activity. The *Customer Activity* report collects and returns information on the entire activity - open, close, on test, comments, etc. The standard activity report run with no changes, excepting perhaps narrowing the criteria by Customer or Dealer, produces a report showing the alarms, signals and related details from the [Customer Activity Log](#).

*The report excludes the entries when someone opened the customer record for viewing or editing.*


## Running a Customer Activity Report

Customer Activity reports provide all activity for a specific customer or range of customers. This report lists signal/alarm details, open and close activity as well as any exception activity.


*Exception activity includes unexpected events such as: unexpected openings/closings, unexpected restores, etc.*




1. To run a Customer Activity report, select **Customer Activity** under the **Activity** section of the *Report Tree*.

 *You can select Reports from the toolbar or the Jump To menu.*

2. If needed, enter or Search for the **Customer ID**. Ensure that value is in both the **From** and **To** fields.

 *For more information on searching for a Customer ID, refer to [Customer Record Overview](#).*

3. Press the **<Tab>** key 4 times after the **From** field is completed.

 *This action will automatically update the **To** field with the information in the **From** field.*

4. Select the **Date** range for the report. The calendar control makes it very easy to locate the correct date.

- Right and left arrows advance the calendar by a month in either direction.
- Clicking on the month name produces a list of months to select from.

5. Determine the **Activity Type**

- **All Activity** – Alarms, Signals, Open/Close, etc.
- **Exception Activity** – Events marked on their Event Codes (within the Supervisor Workstation) as Exception type events.
- **Open/Close Activity** – Events marked on their Event Codes (within the Supervisor Workstation) as Open/Close type events.

6. If desired, click the **Options** and/or **Advanced** buttons for more filtering options.

- Event Codes
  - Event Categories
  - Customer Types
  - Resolution Codes
  - Log Record Types – the labels on the Standard view of the Customer Activity Log.
  - Grouping/Formatting Options
-

**Customer Activity Options**

Customer Activity

Event Codes:

- ☒ \*\* Unknown Event
- ☒ \*1 GSM Link Fail
- ☒ \*2 GSM No Response
- ☒ \*3 Land Line Link Fail
- ☒ \*4 Land Line No Respons
- ☒ \*5 GSM Resp OK
- ☒ \*6 Land Line Resp OK
- ☒ \*7 GSM Remote Link Fail
- ☒ \*8 GSM Remote Resp OK
- ☒ \*A Activation
- ☒ \*A1 Unknown Card
- ☒ \*A2 Unassigned Card
- ☒ \*A3 Unauthorized Access
- ☒ \*AX Unexpected Area
- ☒ \*B Bypass
- ☒ \*BA Burglary Alarm
- ☒ \*C Return

Event Categories:

- ☒ Access Alarms
- ☒ Answering Service
- ☒ Burglary
- ☒ Emergency
- ☒ Environmental Alarms
- ☒ Fire Alarm
- ☒ General Alarms
- ☒ Hidden / Remote Attack

Resolution Codes:

- ☒ Group 1
- ☒ AC Actual Alarm
- ☒ AU Closed by Auto Client
- ☒ CM Company Caused
- ☒ CU Customer Caused
- ☒ EQ Equipment Caused
- ☒ NF No Fault Found
- ☒ PW Power Loss

Customer types:

- ☒ Commercial
- ☒ Residential

Log record types:

- ☒ Signal
- ☒ Alarm
- ☐ Handled (Viewed)
- ☒ Action
- ☒ Response Time
- ☐ Reverse Command
- ☒ Alarm Confirmation
- ☐ Command Alarm (MMA's, A-5)

☐ Mail format  
☒ Suppress operator Id  
☐ Page breaks  
☒ Include comments not associated with an event  
☐ Include customers with no activity

Output format

- ☐ Long
- ☒ Normal
- ☐ Detail
- ☐ Custom

Group by

- ☒ Customer
- ☐ Dealer
- ☐ Branch
- ☐ User ID

Monitoring status

- ☒ Pending
- ☒ Inactive
- ☒ Active
- ☒ Deactivated

Order by

- ☒ Customer ID
- ☐ Customer Name

OK Cancel

**Customer Activity Report Options**

7. Click **Next**.

8. Select the report destination from the list of available contacts/customers/dealers then click **Next**.

*It is also possible to enter a destination not on the contact list by entering the details within the **Override Recipient** section then click **Add to List**.*

9. Click **Finish**. The report queues, runs and publishes to the selected destination.

*The completed report can also be found within the Reports menu → Report queue. Double-click on a completed report for a preview.*

## Daily Signals

The *Daily Signals* report produces similar results to the [Customer Activity](#) report with the exception of how the results display. While the *Customer Activity* report displays results by the Contract number and then by the Alarm Report number, the *Daily Signals* report displays only by date.

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

Daily Signals

Report Description:  Priority:

From :  To :

Customer ID

Customer name

Dealer ID

Branch ID

Group

Class

☒ Date

☐ Include Customer Name

☒ Include details

☐ Filter by Contacted Types

☐ Page breaks

Log record types: ☒ Signal ☒ Alarm ☒ Ignored Signal

Monitoring status: ☒ Pending ☒ Inactive ☒ Active ☒ Deactivated

Output format: ☐ Long ☒ Normal ☐ Detail

Group by: ☒ Date ☐ Dealer ☐ Branch

Summary: ☐ None ☒ Each Day ☐ Grand Totals Only

Daily Signal Report form

## Signals Search Options

Clicking on the **Options** button at the bottom right corner of the *Alarm Response* screen will

bring up additional search options.

**Daily Signals Options**

Daily Signals

Event Codes:

- ☒ \*\* Unknown Event
- ☒ \*1 GSM Link Fail
- ☒ \*2 GSM No Response
- ☒ \*3 Land Line Link Fail
- ☒ \*4 Land Line No Respons
- ☒ \*5 GSM Resp OK
- ☒ \*6 Land Line Resp OK
- ☒ \*7 GSM Remote Link Fail

Event Categories:

- ☒ Access Alarms
- ☒ Answering Service
- ☒ Burglary
- ☒ Emergency
- ☒ Environmental Alarms
- ☒ Fire Alarm
- ☒ General Alarms
- ☒ Holdup / Personal Alarm

Contacted types:

- ☒ Police
- ☒ Fire
- ☒ Medical
- ☒ Agency
- ☒ Site/Customer Contact
- ☒ Dealer
- ☒ Branch

Resolution Codes:

- ☐ Group 1
  - ☐ AC Actual Alarm
  - ☐ AU Closed by Auto Client
  - ☐ CM Company Caused
  - ☐ CU Customer Caused
  - ☐ EQ Equipment Caused
  - ☐ NF No Fault Found
  - ☐ PW Power Loss

Customer types:

- ☒ Commercial
- ☒ Residential

OK Cancel

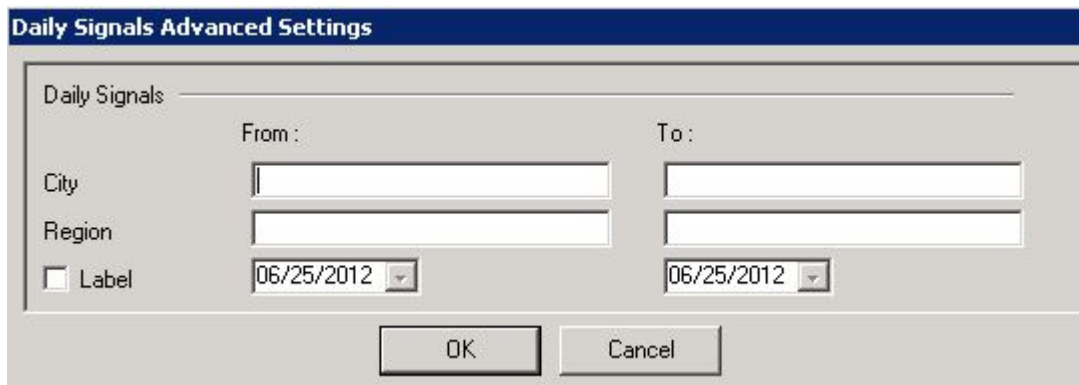
Daily Signals Report Options

The search options are divided into five categories. All options are checked by default as this is the recommended setting.

- **Event Codes** – use this to select only the events required.
- **Event Categories** – use this to narrow the scope of the events to the category of alarm/signal events.
- **Contacted types** - will select the type of dispatch sent to a customer site.
- **Resolution Codes** – will show the authorities and other parties contacted for the signals.
- **Customer types** – will select only the customers of the selected type(s).

### Advanced Signals Search Options

Also on the lower-right of the *Alarm Response* screen is the **Advanced** button. The *Advanced Settings* screen provides additional advanced search options to narrow the search results to a particular range of **City**, **Region** and **Date**.



**Daily Signals Advanced Settings**

Daily Signals

From :                      To :

City                                           

Region                                           

☐ Label                      06/25/2012                      06/25/2012

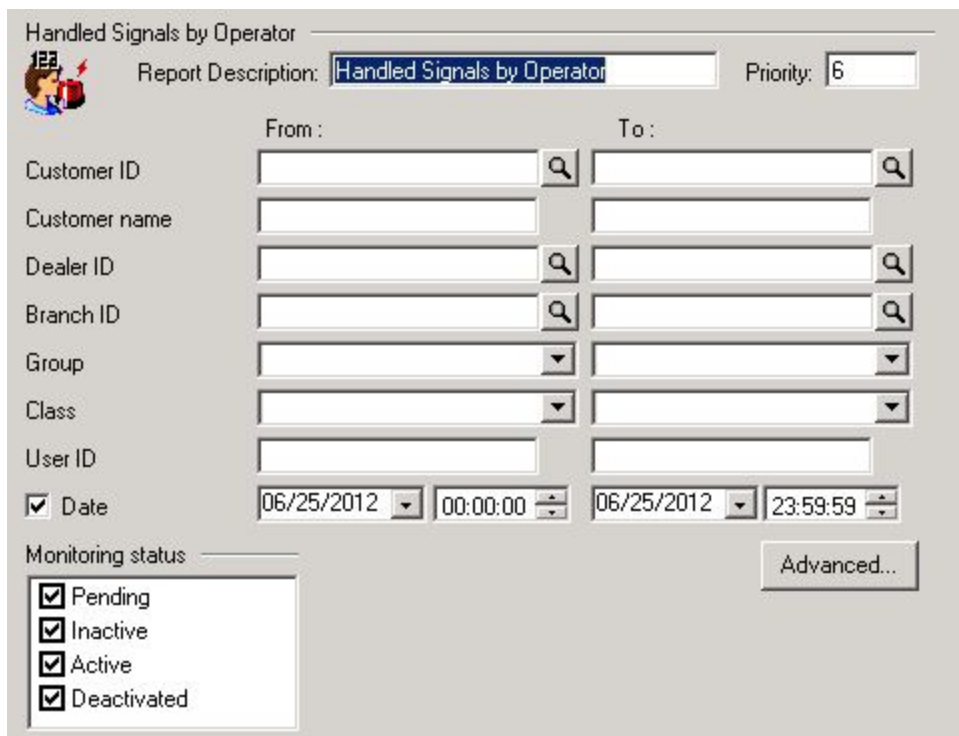
OK                      Cancel

Daily Signals Advanced Options

Once the search parameters are set, click **Next** to continue running the report.

## Handled Signals by Operator

The *Handled Signals by Operator* report is a useful management tool to view the number of alarms Operators are handling.



**Handled Signals by Operator**

Report Description:  Priority:

From :                      To :

Customer ID                                            

Customer name                                           

Dealer ID                                            

Branch ID                                            

Group                                           

Class                                           

User ID                                           

☒ Date                      06/25/2012                      00:00:00                      06/25/2012                      23:59:59

Monitoring status

☒ Pending

☒ Inactive

☒ Active

☒ Deactivated

Advanced...

Handled Signals by Operator Report

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; and


- The Operator is able to close alarms of equal or lower priority along with the alarm they just acknowledged and completed.

## Advanced Handled Signals Search Options

Also on the lower-right of the *Alarm Response* screen is the **Advanced** button. The *Advanced Settings* screen provides additional advanced search options to narrow the search results to a particular range of **City**, **Region** and **Date**.

The screenshot shows a software window titled "Daily Signals Advanced Settings". Inside the window, there is a section labeled "Daily Signals" with a text input field. Below this, there are two columns of input fields. The first column has labels "From:", "City", "Region", and a checkbox labeled "Label". The second column has labels "To:", and two date pickers both showing "06/25/2012". At the bottom of the window are two buttons: "OK" and "Cancel".

Once the search parameters are set, click **Next** to continue running the report.

 *An Acknowledged alarm is an alarm that had a contact action, an action that required an Operator to call someone. Operators may handle an alarm fully and never pick up the telephone to contact a person, and that would be considered a closed alarm but not acknowledged.*

## 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 utilizing 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.

Signal Count by Customer

Report Description:  Priority:

From :  To :

Customer ID

Customer name

Dealer ID

Branch ID

Group

Class

☒ Date

Minimum no. of signals/customer

Monitoring status

- ☒ Pending
- ☒ Inactive
- ☒ Active
- ☒ Deactivated

Signal Count by Customer Report

## Signal Count Search Options

Clicking on the **Options** button at the bottom right corner of the *Alarm Response* screen will bring up additional search options.

Signal Count by Customer Options

Signal Count by Customer

Event Codes:  Event Categories:  Log record types:

☒ \*\* Unknown Event

☒ \*1 GSM Link Fail

☒ \*2 GSM No Response

☒ \*3 Land Line Link Fail

☒ \*4 Land Line No Respons

☒ \*5 GSM Resp OK

☒ \*6 Land Line Resp OK

☒ \*7 GSM Remote Link Fail

☒ \*8 GSM Remote Resp OK

☒ \*A Activation

☒ \*A1 Unknown Card

☒ \*A2 Unknown Card

☒ Access Alarms

☒ Answering Service

☒ Burglary

☒ Emergency

☒ Environmental Alarms

☒ Fire Alarm

☒ General Alarms

☒ Holdup / Personal Attack

☒ Medical Alarms

☒ Open / Close

☒ Service Signals

☒ Signal

☒ Alarm

☒ Ignored Signal

Group by ☐ Customer ☐ Dealer ☐ Branch

Order by ☐ Customer ID ☐ Customer Name

Daily Signals Report Options

The search options are divided into five categories. All options are checked by default as this is the recommended setting.



- **Event Codes** – use this to select only the events required.
- **Event Categories** – narrows the scope of the events to the category of alarm/signal events.
- **Log record types** – is a vital determining factor of what results appear on the finished report. Manitou defaults some standard log record types for all reports. However, some reports do not need all the defaults so it will be important to come to the Advanced dialog and remove the unnecessary log record types.

## Advanced Signal Count Search Options

Also on the lower-right of the *Alarm Response* screen is the **Advanced** button. The *Advanced Settings* screen provides additional advanced search options to narrow the search results to a particular range of **City**, **Region** and **Date**.

Daily Signals Advanced Settings

Daily Signals

From :

To :

City

Region

☐ Label

06/25/2012

06/25/2012

OK Cancel

Daily Signals Advanced Options

Once the search parameters are set, click **Next** to continue running the report.

## 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.

**Note:** See the *Manitou CS 2.0.0 Supervisor Workstation User Guide* for how to set up this option.

## Generating a UL Response Report

To configure and run the UL Response Report, do the following:

1. Click **Reports | System Reports | Activity | UL Response**.



2. Enter/select parameters as needed.

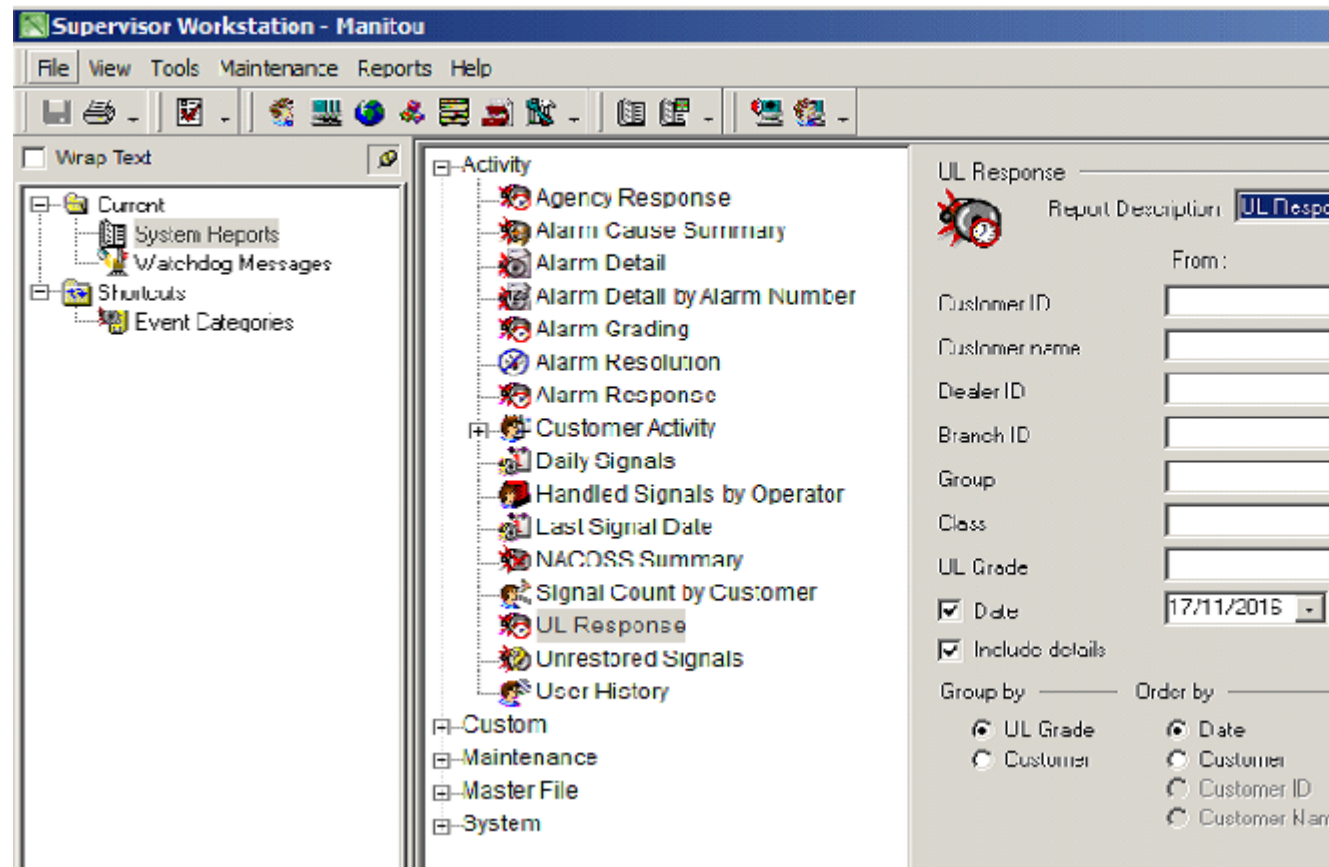
**Note:** The **Date** checkbox is preselected. If you do not want to designate a specific date and time range for your Report, clear the **Date** checkbox. Otherwise, enter the date and time range for which you want to run the Report.

3. If you want, select the **Include Details** checkbox to maximize the amount of information displayed in your Report.

4. Click **Options**. The **UL Response Options Settings** window appears.

5. Select/clear options as needed and then click **OK**. You return to the **UL Response** form.

6. Click **Next** to run the report. See [Generate and Publish a System Report](#) for additional information.



## The Advanced Button

The **Advanced Settings** screen provides additional advanced search options to narrow the search results.

## Unrestored Signals

The *Unrestored Signals* report is a maintenance report typically run to verify if an alarm received a restore signal or if the account requires maintenance in order to clear out the closed, yet unrestored, alarms. The report lists all alarms that have **Restore Required** that are not yet 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 pileup and create restore overdue signals when the alarm itself is restored.

Unrestored Signals

Report Description:  Priority:

From :  To :

Customer ID

Customer name

Dealer ID

Branch ID

Group

Class

☒ Signal Date

Minimum number of minutes unrestored:

Options...

Group by  Order by

☒ Customer ☒ Date

☐ Dealer ☐ Customer ID

☐ Branch ☐ Customer name

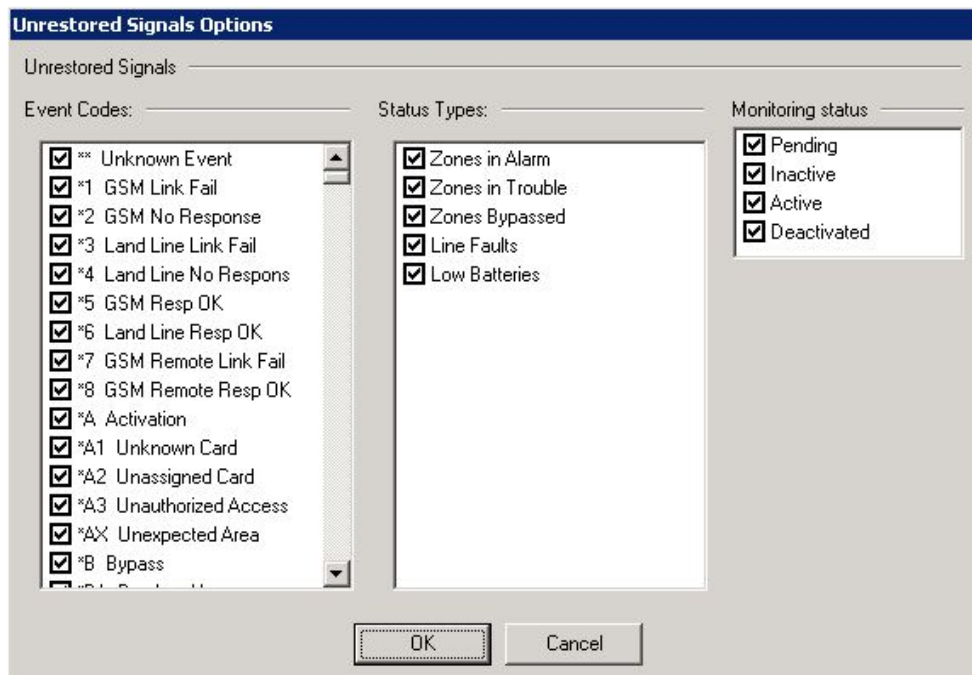
Advanced...

Unrestored Signals Report

When run on default settings, the report will find all signals that are unrestored for greater than 10 minutes and sort the results by date. The report may be further defined by decreasing or increasing or the minimum number of minutes the signals are unrestored and/or defining a Customer ID, Customer name, Dealer ID, Branch ID, Group or Class Code or by date or date range.

## Unrestored Signals Search Options

Clicking on the **Options** button at the bottom right corner of the *Alarm Response* screen will bring up additional search options.



The **Unrestored Signals Options** dialog box is divided into three sections: **Event Codes**, **Status Types**, and **Monitoring status**. Each section contains a list of items with checkboxes, all of which are checked by default.

Event Codes	Status Types	Monitoring status
<input checked="" type="checkbox"/> ** Unknown Event	<input checked="" type="checkbox"/> Zones in Alarm	<input checked="" type="checkbox"/> Pending
<input checked="" type="checkbox"/> *1 GSM Link Fail	<input checked="" type="checkbox"/> Zones in Trouble	<input checked="" type="checkbox"/> Inactive
<input checked="" type="checkbox"/> *2 GSM No Response	<input checked="" type="checkbox"/> Zones Bypassed	<input checked="" type="checkbox"/> Active
<input checked="" type="checkbox"/> *3 Land Line Link Fail	<input checked="" type="checkbox"/> Line Faults	<input checked="" type="checkbox"/> Deactivated
<input checked="" type="checkbox"/> *4 Land Line No Respons	<input checked="" type="checkbox"/> Low Batteries	
<input checked="" type="checkbox"/> *5 GSM Resp OK		
<input checked="" type="checkbox"/> *6 Land Line Resp OK		
<input checked="" type="checkbox"/> *7 GSM Remote Link Fail		
<input checked="" type="checkbox"/> *8 GSM Remote Resp OK		
<input checked="" type="checkbox"/> *A Activation		
<input checked="" type="checkbox"/> *A1 Unknown Card		
<input checked="" type="checkbox"/> *A2 Unassigned Card		
<input checked="" type="checkbox"/> *A3 Unauthorized Access		
<input checked="" type="checkbox"/> *AX Unexpected Area		
<input checked="" type="checkbox"/> *B Bypass		

At the bottom of the dialog are **OK** and **Cancel** buttons.

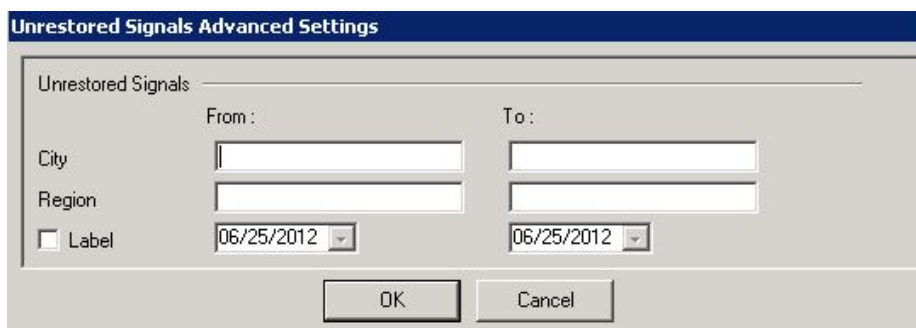
Unrestored Signals Options

The search options are divided into five categories. All options are checked by default as this is the recommended setting.

- **Event Codes** – use this to select only the events required
- **Status Types** – narrow the scope of the events by the status types
- **Monitoring status** - filter by event status

### Advanced Unrestored Signals Search Options

Also on the lower-right of the *Alarm Response* screen is the **Advanced** button. The *Advanced Settings* screen provides additional advanced search options to narrow the search results to a particular range of **City**, **Region** and **Date**.



The **Unrestored Signals Advanced Settings** dialog box contains search criteria for **City**, **Region**, and **Date**. It includes **From** and **To** fields for each category.

Category	From	To
City	<input type="text"/>	<input type="text"/>
Region	<input type="text"/>	<input type="text"/>
Label	<input type="text" value="06/25/2012"/>	<input type="text" value="06/25/2012"/>

At the bottom are **OK** and **Cancel** buttons.

Unrestored Signals Advanced Options

Once the search parameters are set, click **Next** to continue running the report.

## User History

The *User History* report is designed to show Operator logon and logoff information. Users may choose to include all history information, or limit the report to logon or logoff information.

User History Report

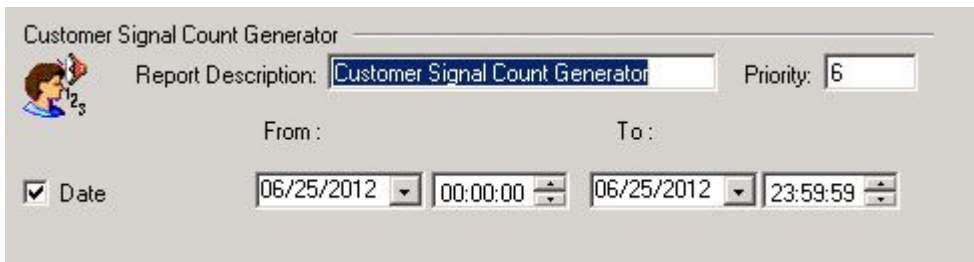
Once the search parameters are set, click **Next** to continue running the report.

## Custom Reports

Custom Reports are reports that have required special development to be entered in to the Manitou system.

## Customer Signal Count Generator

The *Customer Signal Count Generator* is an exception report used to find accounts that do not contain class codes or other information that will enable the Dealer Signal Count report to run and give accurate results. The report runs by default on the current date (the most preferred); however, the dates can be adjusted to include a date range.



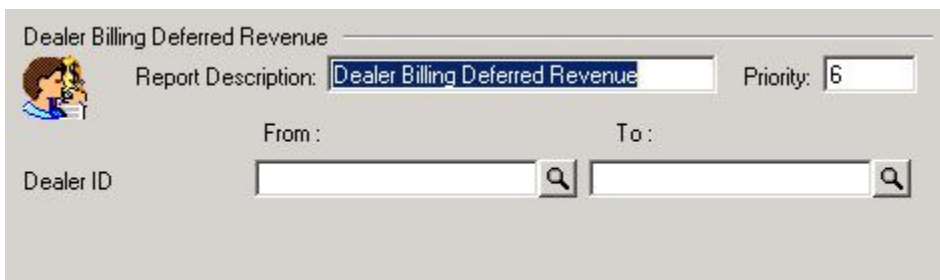
Customer Signal Count Generator form

Once the search parameters are set, click **Next** to continue running the report.


## Dealer Billing Deferred Revenue

The *Dealer Billing Deferred Revenue* will be tracked when enhanced billing is licensed. The report will display the necessary deferred revenue adjustments that need to be made.

- Populate the **Dealer ID** or Dealer ID range by inputting or searching for a Dealer ID in the **From:** and **To:** fields.



Dealer Billing Deferred Revenue form

 *The adjustments must be entered manually into the accounting software.*

Once the search parameters are set, click **Next** to continue running the report.

## Dealer Billing Generate

The *Dealer Billing Generate* report will report on all billing discrepancies, which can then be resolved in Manitou.

- Populate the **Dealer ID** or Dealer ID range by inputting or searching for a Dealer ID in the **From:** and **To:** fields.

The **Prorate Date Limit** field sets the date from which a charge is allowed.

**Example:** If an account adds an additional pay feature on June 3rd but has an agreement that doesn't begin charging until June 15th, the Prorate Date Limit field could be used to specify the prorated date of June 15th.

 *In most cases, the Prorate Date Limit field will be unchecked.*

Dealer Billing Generate

Report Description:  Priority:

From:  To:

Dealer ID

☒ Prorate Date Limit

Note: The Customer Signal Count Generator must be run before this report in order to generate activity-based charges.

Dealer Billing Generate Report form

In the example below, the report was run for all existing Dealers.

03/10/2009 11:50

ID: BOLD

### Dealer Billing Generate Report

Billing Date: 04/01/2009  
 Prorate Date Limit: 02/01/2009  
 Activity Start Date: 02/01/2009 00:00:00  
 Activity End Date: 03/28/2009 23:59:59

Dealer	Customer ID	Date	Message
DLR001	100-01		No recurring billing info found for item code 'DLR1FIRE'. Services with this item code will not be billed.
DLR001	100-01		No add charge billing info found for item code 'DLR1FIRE'. No add charges will be generated for services with this item code.
DLR001	100-01		No recurring billing info found for item code 'O/C SUPERVISED'. Services with this item code will not be billed.
DLR001	100-01		No add charge billing info found for item code 'O/C SUPERVISED'. No add charges will be generated for services with this item code.
DLR001	100-01		No signal overage billing info found for item code 'DLR1FIRE'. No signal overage charges will be generated for services with this item code.
DLR002			Dealer is not linked to accounting. No invoice lines will be generated.
DLR003			Dealer is not linked to accounting. No invoice lines will be generated.
DLR0101	XML000001		No recurring billing info found for item code 'ALARM MONITORING'. Services with this item code will not be billed.
DLR0101	XML000001		No add charge billing info found for item code '2DT'. No add charges will be generated for services with this item code.
DLR0101	XML000002		No recurring billing info found for item code 'SILVER SERVICE'. Services with this item code will not be billed.
DLR0101	XML000003		No recurring billing info found for item code 'GOLD SERVICE'. Services with this item code will not be billed.
DLR0101	XML000005		No recurring billing info found for item code 'O/C SUPERVISED'. Services with this item code will not be billed.
DLR0101	XML000001		No signal overage billing info found for item code 'ALARM MONITORING'. No signal overage charges will be generated for services with this item code.
1982			Dealer is not linked to accounting. No invoice lines will be generated.

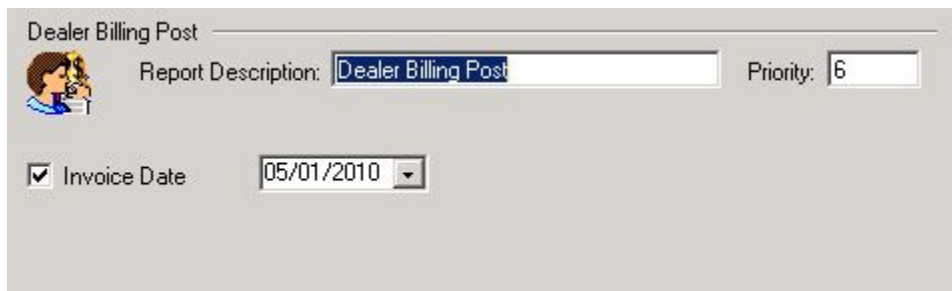
The first messages for DLR001 indicate that no billing charge codes were found at the Dealer or Monitoring Company Billing Charges form for the item code "DRL1FIRE." To remedy this, the appropriate billing charge code must be added to either the Dealer or the Monitoring Company. Other messages indicate that some dealers are not linked to accounting.

These messages are simply warnings, indicating that the charges will not be posted to the accounting software. Rectifying these issues will allow for the charges to be posted.

## Dealer Billing Post

**Important:** Do NOT perform the Dealer Billing Post report unless absolutely certain of all information. Once performed, the Post report CANNOT be undone.

Once the [Dealer Billing Preview](#) report has been run, the **Dealer Billing Post** report is the final step in order to post the billing to the accounting system. The only editable fields in this report are the **Report Description** and the **Invoice Date**. Checking the Invoice Date box will post the billing to that exact date in the accounting software.

The screenshot shows a software window titled "Dealer Billing Post". On the left is a small cartoon icon of a person with glasses. To the right of the icon, there is a label "Report Description:" followed by a text box containing "Dealer Billing Post". Further right is a label "Priority:" followed by a text box containing "6". Below these, there is a checked checkbox labeled "Invoice Date" followed by a date dropdown menu showing "05/01/2010".

Dealer Billing Post

**Example report:**

03/10/2009 12:10

## Dealer Billing Post Report

Invoice Date: 04/01/2009

Billing Date: 04/01/2009

**DLR001**

Total invoice lines created: 0

**DLR0101**

Total invoice lines created: 2

**Finalization**

Successfully created all invoices. Posting the invoices.

Successfully posted the invoices. Updating billing cycle to next month.

**Summary**

	<b>Total</b>	
Invoiced	\$	6.84
Deferred	\$	0.00
Net Invoiced	\$	6.84
Deferred Revenue Realized	\$	0.00
Net Revenue	\$	6.84

## Dealer Billing Preview

The **Dealer Billing Preview** report will list all transactions that are ready to be posted to the accounting system for dealer billing. This preview can be run as many times as needed, and should be the last report run before running the [Dealer Billing Post](#).

Users have several options for this report, including sending out the report to individual Dealers or Customers by selecting a specific **Dealer** and/or **Customer ID**. Parameters for this report include **Dealer** options and **Grand Totals** options.

The **Dealer** options allow the user to select whether the report should include all **Details** or should be summarized by charge type and/or billing code.

The **Grand Totals** options will display a total **Amount** of charge types, or may be used to just show the **Charge Type Summary** or the **Billing Code Summary**.



Dealer Billing Preview

Report Description:  Priority:

From :  To :

Dealer ID

Customer ID

Customer name

Order by

☒ Customer
 ☐ Mailable Report

☐ Charge Type
 ☐ Page Break After Each Dealer

☐ Billing Code
 ☐ Compact Format

Dealer

Grand Totals

☒ Details
 ☐ Total Amount

☐ Charge Type Summary
 ☐ Charge Type Summary

☐ Billing Code Summary
 ☐ Billing Code Summary

Dealer Billing Preview

**Example report:**

03/10/2009 12:04

ID: BOLD

**Dealer Billing Preview**

Order By: Customer  
 Show: Dealer Details, Grand Total Amt

**DLR001 - Dealer One****Total: 0.00****DLR0101 - Alarm Security Install Services**

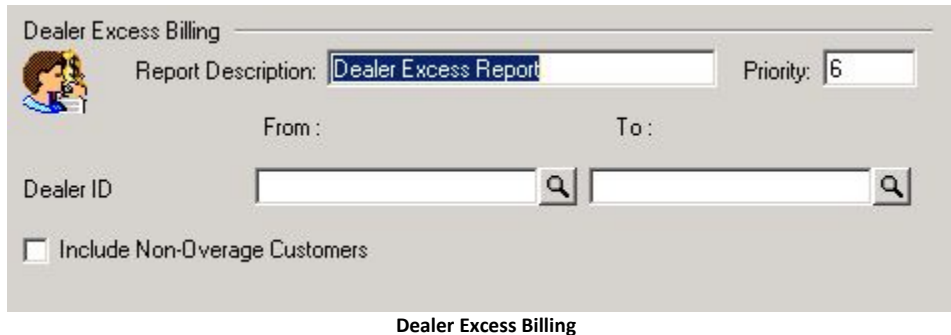
Customer ID	Name	Charge Type	Service	Billing Code	From	To	Qty	Price	Amt
XML000001	Matt Narowski	Recurring	Every Other Day Test	2DT	04/01/2009	04/30/2009	1	4.00	4.00
		Prorated	Every Other Day Test	2DT	03/10/2009	03/31/2009	1	4.00	2.84
		<b>Total:</b>							<b>6.84</b>
<b>Grand Total:</b>								<b>6.84</b>	

In this example, the *Dealer Billing Preview* report was run for DLR001 with the **Details** and **Total Amount** options checked. These options will display the customer ID and Customer Name, the charge types associated with the customer, the services, billing codes, and the dates that the services are enabled. Additionally, all charges are added up and totaled at the end of the report.

## Dealer Excess Billing

The **Dealer Excess Billing** report shows any excesses above the set amount for a particular Dealer. This report can be setup to specify limit, price and actual count of excess instances.

To run the **Dealer Excess Billing** report, a user-defined date field must first be created within the Supervisor Workstation.



The screenshot shows a window titled "Dealer Excess Billing" with a small icon of a person on the left. The window contains the following fields and controls:

- Report Description:** A text box containing "Dealer Excess Report".
- Priority:** A text box containing "6".
- From :** A date selection field.
- To :** A date selection field.
- Dealer ID:** A text box with a search icon (magnifying glass) to its right.
- Include Non-Overage Customers:** A checkbox that is currently unchecked.

Below the window, the text "Dealer Excess Billing" is centered.

To generate the report, specify or search for **Dealer ID** and select to **Include Non-Overage Customers**, if appropriate.

Once the search parameters are set, click **Next** to continue running the report.

## Dealer Signal Count

The **Dealer Signal Count** report lists the number of signals for each customer based on the dealer and the dealer's billing settings.

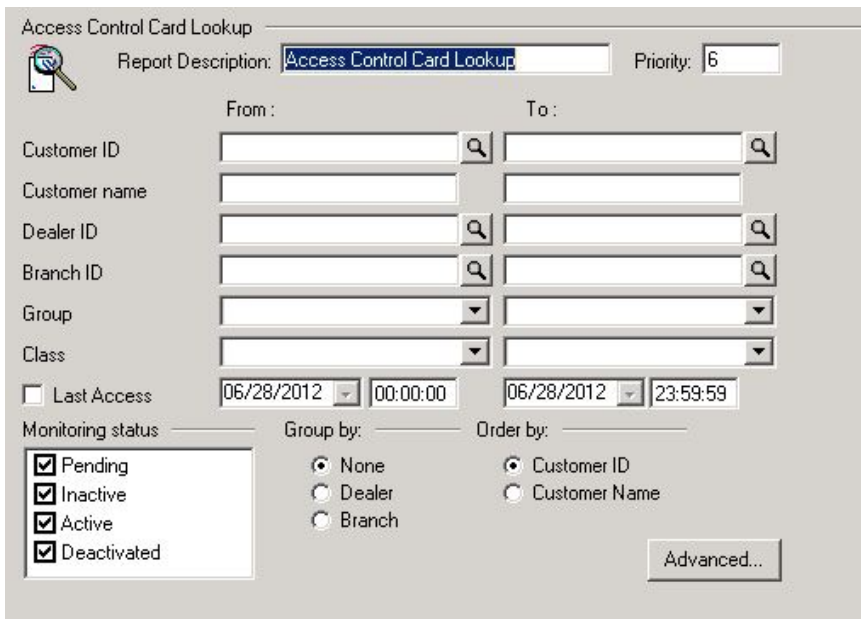
Once the search parameters are set, click **Next** to continue running the report.

## Maintenance Reports

The Maintenance Report section contains the reports that apply to account and system 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 may be useful as a scheduled report for customers who utilize [Access Control](#) to view when employees have accessed the building.



The screenshot shows a software window titled "Access Control Card Lookup". At the top, there is a "Report Description:" field containing "Access Control Card Lookup" and a "Priority:" field with the value "6". Below these are two columns of search criteria, each with a "From:" and "To:" label. The criteria include "Customer ID", "Customer name", "Dealer ID", "Branch ID", "Group", and "Class". Each of these has a corresponding input field with a search icon. Below the search criteria, there is a "Last Access" section with a checkbox and two date/time pickers. The "Monitoring status" section contains a list box with four items: "Pending", "Inactive", "Active", and "Deactivated", all of which are checked. To the right of this list box are "Group by:" and "Order by:" sections. "Group by:" has three radio button options: "None", "Dealer", and "Branch". "Order by:" has two radio button options: "Customer ID" and "Customer Name". At the bottom right of the form is an "Advanced..." button.

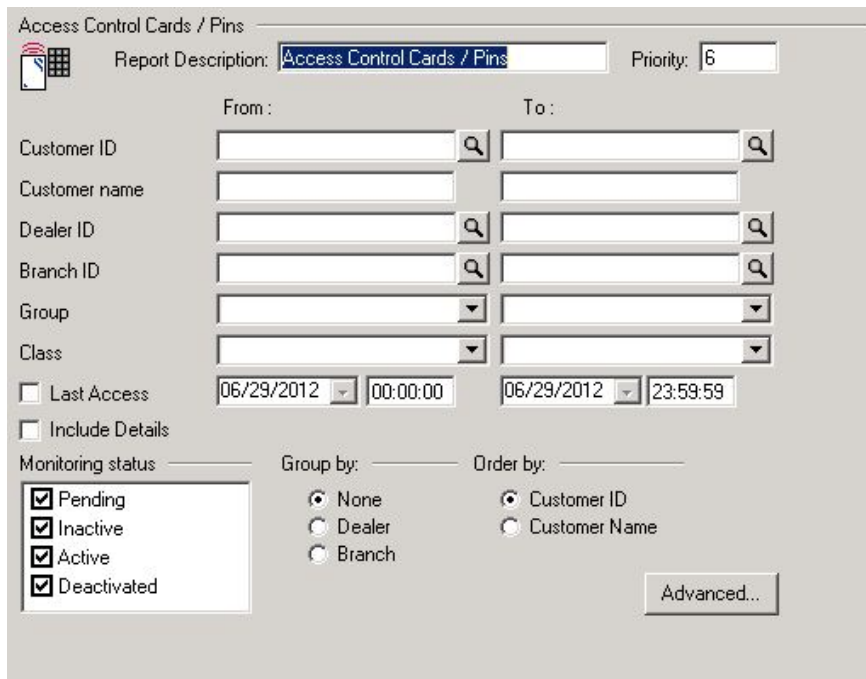
Access Control Card Lookup

Users may enter search criteria based on **Customer ID**, **Customer Name**, **Dealer ID**, **Branch ID**, **Group** or **Class**. The report may also include the time the building was last accessed and the **Monitoring Status**.

Once the search parameters are set, click **Next** to continue running the report.

## Access Control Cards/Pins

The **Access Control Cards/Pins** report provides a detailed list of customers at a site that utilizes [Access Control](#) and may wish 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.



Access Control Cards / Pins

Report Description:  Priority:

From :  To :

Customer ID

Customer name

Dealer ID

Branch ID

Group

Class

☐ Last Access

☐ Include Details

Monitoring status ☒ Pending ☒ Inactive ☒ Active ☒ Deactivated

Group by: ☐ None ☐ Dealer ☐ Branch

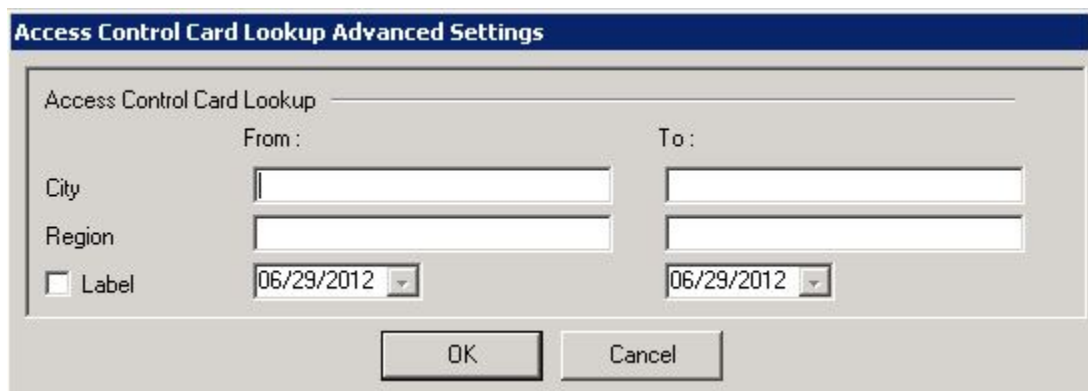
Order by: ☐ Customer ID ☐ Customer Name

Access Control Cards/Pins

Users may enter search criteria based on **Customer ID**, **Customer Name**, **Dealer ID**, **Branch ID**, **Group** or **Class**. The report may also include the time the building was last accessed along with details of the events. Users can also limit the search to specific dates and time periods and choose to have the report divided in to groups and ordered by ID or Name.

### Advanced Option Settings

Also on the lower-right of the *Access Control Cards/Pins* screen is the **Advanced** button. The *Advanced Settings* screen provides additional advanced search options to narrow the search results to a particular range of **City**, **Region** and **Date**.



Access Control Card Lookup Advanced Settings

Access Control Card Lookup

From :  To :

City

Region

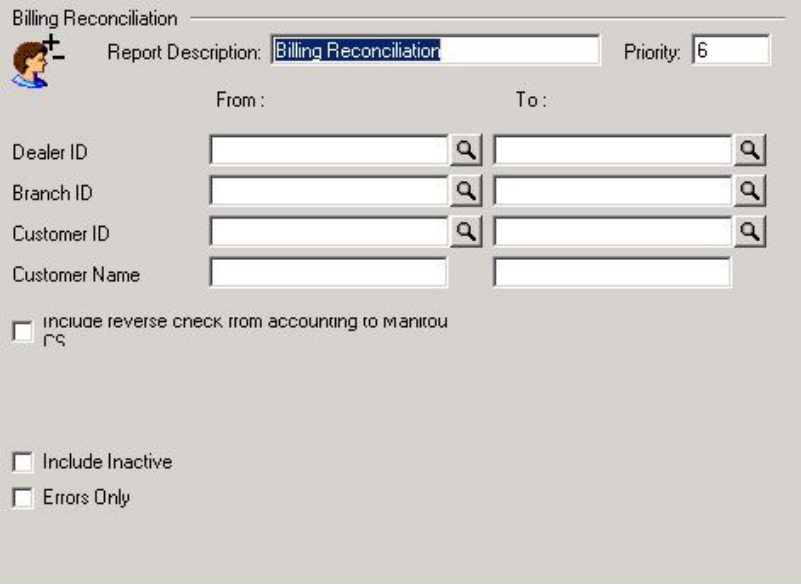
☐ Label

Access Control Cards/Pins Advanced Options

Once the search parameters are set, click **Next** to continue running the report.

## Billing Reconciliation

The **Billing Reconciliation** report produces a list of customers that have inconsistent billing setup information between Sedona and Manitou CS. This helps to find inaccuracies and make necessary corrections to customer accounts.



The screenshot shows a web-based form titled "Billing Reconciliation". At the top left is a small icon of a person. To the right of the icon is a "Report Description:" label followed by a text box containing "Billing Reconciliation". Further right is a "Priority:" label followed by a text box containing "6". Below these are two columns of search criteria, each with a "From:" and "To:" label. The criteria are: Dealer ID, Branch ID, Customer ID, and Customer Name. Each criterion has two adjacent text boxes with a magnifying glass icon to the right of each box. Below the search criteria are three checkboxes: "Include reverse check from accounting to Manitou CS" (unchecked), "Include Inactive" (unchecked), and "Errors Only" (unchecked).

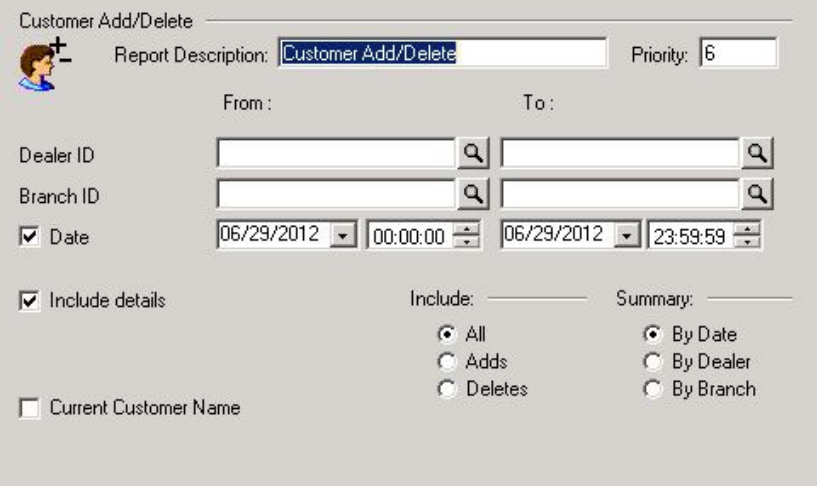
Billing Reconciliation Report

The form allows users to designate **Dealer**, **Branch** and **Customer**, include a reverse check and inactive accounts as well as specify **Errors Only**.

Once the search parameters are set, click **Next** to continue running the report.

## 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 if the **Include details** checkbox is selected or not, which is selected by default. It is also automatically set to the current day and to **Include All** adds and deletions grouping the **Summary By Date** by default as well.



Customer Add/Delete

Report Description:  Priority:

From :  To :

Dealer ID

Branch ID

☒ Date

☒ Include details

☐ Current Customer Name

Include: ☒ All ☐ Adds ☐ Deletes

Summary: ☒ By Date ☐ By Dealer ☐ By Branch

Customer Add/Del Report form

Users may search by **Dealer** or **Branch ID**.

Once the search parameters are set, click **Next** to continue running the report.

## 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.

The report results may be expanded or reduced by entering the **Transmitter type** or selecting the **Customer ID** or **name**, **Dealer** or **Branch ID**, **Group** or **Class** code, **Receiver Line Prefix** or **Monitoring Status**.

Customers With Tx Type

Report Description: Customers With Tx Type Priority: 6

From : To :

Transmitter type

Customer ID

Customer name

Dealer ID

Branch ID

Group

Class

Rec Line Prefix

- ☒ BURG - Burglary Panels
- ☒ DEF - Default
- ☒ FIRE - Fire Panels
- ☒ WP - WIN-PAK

Monitoring status

- ☒ Pending
- ☒ Inactive
- ☒ Active
- ☒ Deactivated

Options...

Advanced...

Customer with Transmitter Type Report form

Users may select or deselect the Receiver Line Prefix from the **Rec Line Prefix** menu and choose **Monitoring status**.

## Search Options

**Search Options** for the *Customers with Tx Type* report include selecting how to **Group** and **Order** the report.

Customers With Tx Type Options

Customers With Tx Type

Group by

- ☒ None
- ☐ Dealer
- ☐ Branch

Order by

- ☒ Customer ID
- ☐ Customer Name

OK Cancel

Customer with Transmitter Type form Options

## Advanced Search Options

Also on the lower-right of the *Alarm Detail* screen is the **Advanced** button. The *Advanced Settings* screen provides additional advanced search options to narrow the search results to

a particular range of **City**, **Region** and **Date**.

Customer with Transmitter Type Advanced Options

Once the search parameters are set, click **Next** to continue running the report.

## Maintenance Issues

### Generating a Maintenance Issues Report

Perform the following steps to generate a Maintenance Issues Report:

1. Navigate to the Reports menu, and select "System Reports".

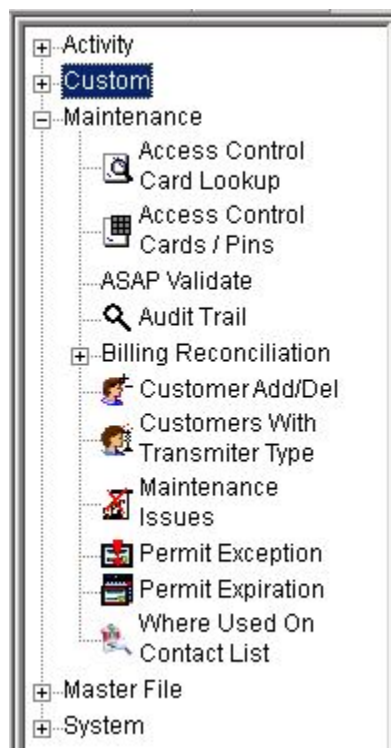
**Result:** the "System Reports" Navigation Tree displays as shown in the following screenshot:



2. Click the "Maintenance" Navigation Tree Node.

**Result:** the Maintenance section of the Navigation Tree expands as displayed in the following screenshot:





3. Double-click "Maintenance Issues".

**Result:** the "Maintenance Issues" form displays as shown in the following screenshot:

**Maintenance Issues**

Report Description:  Priority:

From:  To:

Customer ID

Name

Dealer ID

Branch ID

Group

Class

☐ Log Date

☐ Last Action Date

☐ Resolved Date

☐ Appointment Date

☐ Include maintenance log

Types to include:

- ☒ Company
- ☒ Customer
- ☒ Dealer
- ☒ Branch
- ☒ Agency
- ☒ Authority
- ☒ Global Keyholder

Resolution:

- ☒ New
- ☐ Resolved
- ☒ Unresolved

User ID:

- ☒ 1 - User A
- ☒ 1973 - Doug M
- ☒ 2 - Odin
- ☒ 3 - Tom
- ☒ 4 - User C
- ☒ AMYC - Amy Condon
- ☒ BLAH - a
- ☒ BOLD - Bold Technologies

On Site:

- ☒ Yes
- ☒ No

Priority:

- ☒ 0
- ☒ 1
- ☒ 2
- ☒ 3
- ☒ 4
- ☒ 5
- ☒ 6
- ☒ 7
- ☒ 8
- ☒ 9
- ☒ 10

Service Type:

- ☒ Camera Malfunction
- ☒ Panel Upgrade
- ☒ Replace Battery
- ☒ Unknown Panel Issue

Technician:

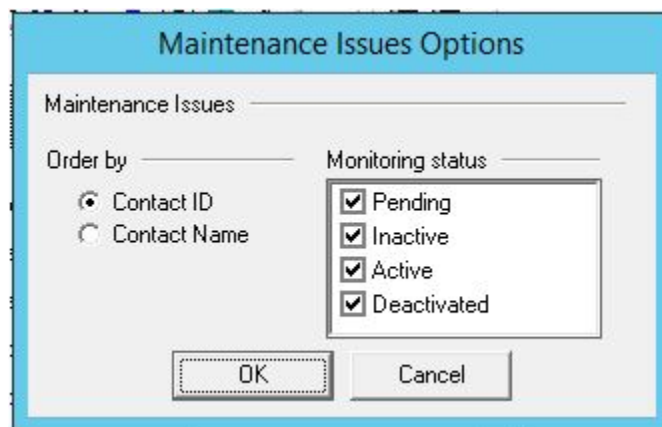
- ☒ Nial MacDnald
- ☒ Bill
- ☒ Central Tech
- ☒ Global Keyholder #1

4. If you want, apply any of the following parameters to your Maintenance Issues Report:
  - Customer ID
  - Name
  - Dealer ID
  - Branch ID
  - Group
  - Class
5. To run a Maintenance Issues Report, enter a beginning value in the "From:" field and an ending value in the "To:" field. The system will report on all items in the selected category that fit between the beginning and ending values.
6. If you want to run your Report by log date, select the "Log Date" checkbox and enter a

date and time range.

7. If you want to run your Report by last action date, select the "Last Action Date" checkbox and enter a date and time range.
8. If you want to run your Report by the date on which the issue was resolved, select the "Resolved Date" checkbox and enter a date and time range.
9. If you want to run your Report by the technician appointment date, select the "Appointment Date" checkbox and enter a date and time range.
10. If you want to maximize the amount of information that displays in your Report, select the "Include maintenance log" checkbox.
11. Items in the "Types to include:", "Resolution:", "User ID:", "On Site:", "Priority:", "Service Type:", and "Technician:" areas of the form display as preselected. If you want, deselect the items you want to exclude from your Report.
12. Only the "New" and "Unresolved" checkboxes display as preselected in the "Resolution:" area of the form. If you want, select the "Resolved" checkbox to include resolved issues, as well.
13. Click **"Options"**.

**Result:** the "Maintenance Issues Options" window displays as shown in the following screenshot:



13. All the options in the "Monitoring status" area of the window display as preselected. Deselect any items you want to exclude from your Report.
14. The "Contact ID" option in the "Order by" area of the window displays preselected. If you want to order your Report by "Contact Name", select that option instead.
15. Click **"OK"**.  
**Result:** the "Options" window closes and the system returns you to the "Maintenance Issues" form.
16. Once you have entered all the parameters for your Report, click the **"Next"** button located in the bottom-right corner of the form.  
**Result:** the Distribution Tab displays as shown in the following screenshot:

Override or unlisted destination:

Override recipient's name:

Override destination type:

Override destination address (Fax/Email):

Contact list destination:

Default printer:

Contact list type:

Customer:

☐ Show suppressed contacts ☐ Hold for preview

☐ Contacts
 

- ☐ Anytime Bill
- ☐ Mary Beth
- ☐ Pete - Non Opening user
- ☐ Same Spade
- ☐ John Doe
- ☐ Jg
- ☐ Jeff Herd
- ☐ Non Rotating user 1
- ☐ Non Rotating user #2
- ☐ Jane Doe
- ☐ 11
- ☐ 12
- ☐ 13
- ☐ 14
- ☐ 15
- ☐ 16
- ☐ 17
- ☐ 18
- ☐ 19
- ☐ 20
- ☐ 21
- ☐ Dealer
  - ☐ Dealer GH 202 for testing
- ☐ Branch
- ☐ Agency
- ☐ Authority
- ☐ Customer
  - ☐ George's testing account
  - ☐ Company (printer only)

17. For instructions on distributing your Report, refer to the "System Reports" document.

### The Advanced Button

Some Report forms include an Advanced Settings button. Clicking this button results in the

display of an Advanced Settings window. Use the "Customer user defined fields" form in the Tools menu, under Options, and Account Creation/Maintenance to customize Report fields on Advanced Settings windows.

For instructions on how to access and use the form, refer to the "System Reports" document.

## Permit Exception

A Permit Exception occurs when an Authority requires a permit and the customer cannot produce one. The default selections in the *Permit Exception* report include **Pending** and **Active** status as well as all **Authority** types. This report may be customized by **Customer**, **Dealer** or **Branch** and narrowed down by a specific **Group**, **Class** and **Authority**.

Permit Exception

Report Description:  Priority:

From :  To :

Customer ID

Customer name

Dealer ID

Branch ID

Group

Class

Authority ID

☐ Status date

Monitoring status ☒ Pending ☐ Inactive ☒ Active

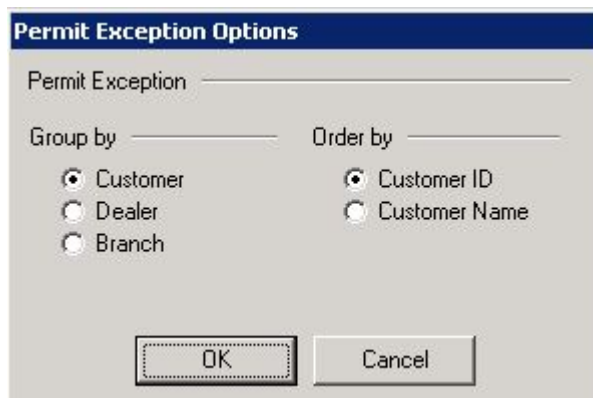
Authority types to include: ☒ Police ☒ Fire ☒ Medical

Permit Exception Report

A **Status date** may indicated as well as the **Monitoring status** and what **Authority types to include**.

## Search Options

Clicking the **Options** button on the lower right of the *Permit Exception* screen will provide the additional options of selecting grouping and ordering parameters for the report.



**Permit Exception Options**

Permit Exception \_\_\_\_\_

Group by \_\_\_\_\_ Order by \_\_\_\_\_

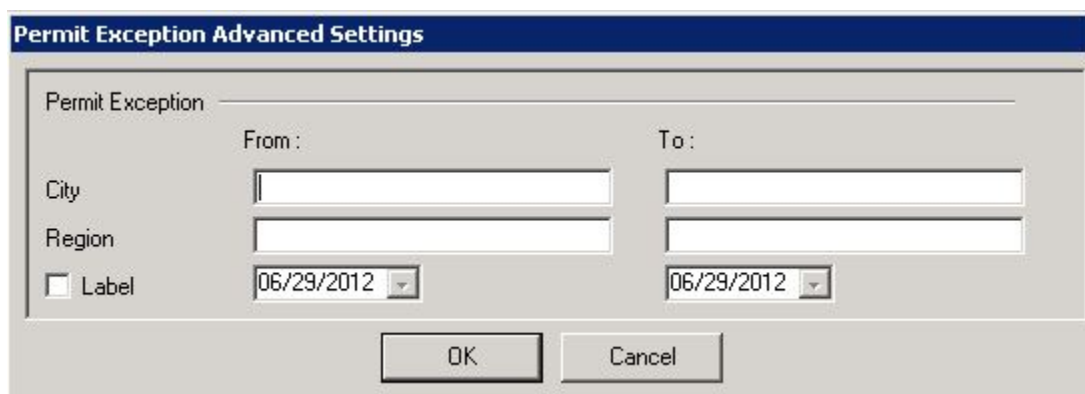
☒ Customer      ☒ Customer ID  
☐ Dealer      ☐ Customer Name  
☐ Branch

OK Cancel

Permit Exception Report Options

## Advanced Search Options

**Advanced** search options allow for the designation of **City** and **Region** as well as **Label** date range.



**Permit Exception Advanced Settings**

Permit Exception \_\_\_\_\_

From : \_\_\_\_\_ To : \_\_\_\_\_

City \_\_\_\_\_

Region \_\_\_\_\_

☐ Label 06/29/2012 06/29/2012

OK Cancel

Permit Exceptions Advanced Options

Once the search parameters are set, click **Next** to continue running the report.

## 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 may not get service from the authorities.

Permit Expiration

Report Description:  Priority:

From :  To :

Customer ID

Customer name

Dealer ID

Branch ID

Group

Class

Authority ID

☐ Expiration date

Authority types to include: ☐ Police ☐ Fire ☐ Medical

Customer types to include: ☐ Commercial ☐ Residential

Permit Expiration Report form

This report produces the listing of permits that expire within the applicable date range, and not just list the permits that are currently expired. This report may be further controlled by selecting a date or date range or by entering Customer ID or name, Dealer or Branch IDs, Group or Class codes. The results may be ordered by Expiration Date, Customer ID or Authority Type.

### Search Options

Search options, found by clicking the **Options** button located at the bottom-right of the *Permit Expiration* report screen, include grouping and order selections as well as **Monitoring status** choices.

**Permit Expiration Options**

Permit Expiration \_\_\_\_\_

Group by: \_\_\_\_\_ Order by: \_\_\_\_\_ Monitoring status: \_\_\_\_\_

☒ None  
☐ Dealer  
☐ Branch  
☐ Authority type

☒ Expiration date  
☐ Customer ID  
☐ Customer name

☒ Pending  
☒ Inactive  
☒ Active  
☒ Deactivated

OK Cancel

Permit Expiration Report Options

## Advanced Search Options

Additional parameters are available by clicking the Advanced button, also located at the bottom-right of the Permit Expiration report screen. These additional options include specifying **City** and **Region** as well as **Label** date range.

**Permit Expiration Advanced Settings**

Permit Expiration \_\_\_\_\_

From : \_\_\_\_\_ To : \_\_\_\_\_

City \_\_\_\_\_

Region \_\_\_\_\_

☐ Label 06/29/2012 06/29/2012

OK Cancel

Permit Expiration Report Advanced Options

Once the search parameters are set, click **Next** to continue running the report.

## Where Used on Contact List

The *Where Used on Contact List* report will produce a listing of the customer, dealer, branch, authority, agency, etc. 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)



Where Used on Contact List Report

There may be several sites where a contact person is listed individually on multiple customer records. This report will not be able to collect any information on those persons as they are not global keyholders. Persons must have a Contact ID in order to be listed in the *Where Used on Contact List* report.

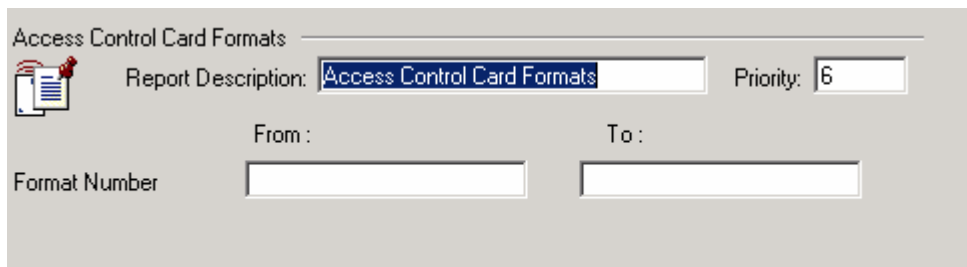
Once the search parameters are set, click **Next** to continue running the report.

## Master File Reports

The Master File section not only contains the [Customer Master File](#) report, but also the Master file reports for Dealer, Agency, Authority, Branch, Monitoring Company and every other form housed within the Supervisor workstation that contains data.

## 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.



Access Control Card Formats

Once the search parameters are set, click **Next** to continue running the report.

## 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.

Accounting Companies

Report Description: Accounting Companies Priority: 6

From : To :

Company ID

Accounting Company Type

- ☒ Navision
- ☒ Sedona
- ☒ Generic SQL
- ☒ QuickBooks

Direction of Interface In List

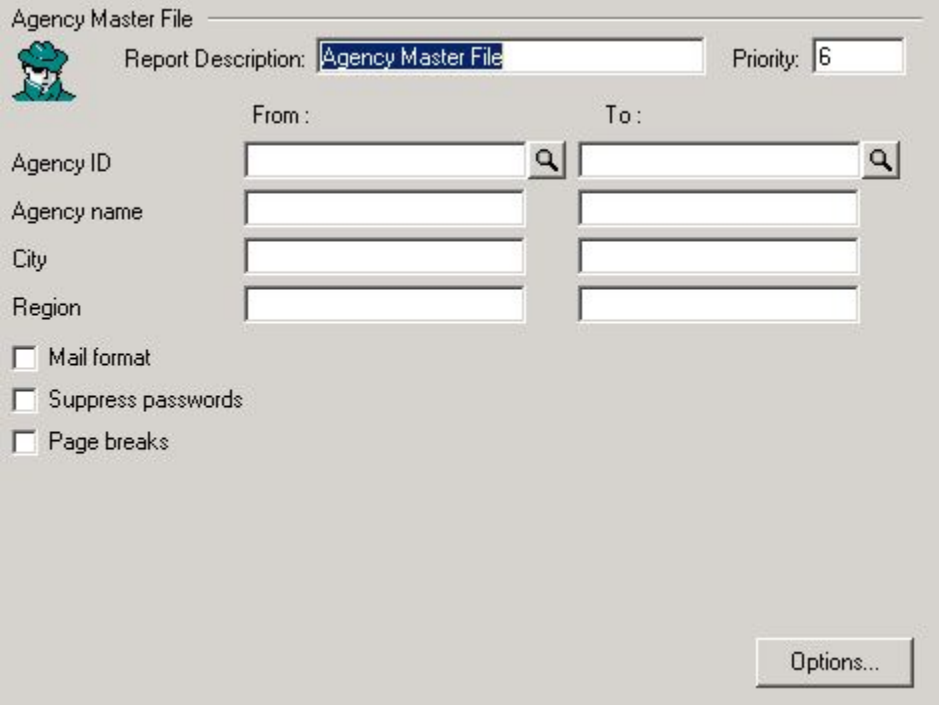
- ☒ Not interfaced
- ☒ Manitou CS to Acc...
- ☒ Accounting to Man...
- ☒ Read only
- ☒ Dealer Billing

Accounting Companies Report

- Select a **Company ID** from the drop down menu(s), as well as the **Accounting Company Type** and the **Direction of the Interface in the List** to set the search criteria.
- Once the search parameters are met, click **Next** to continue running the report.

## Agency Master File

The *Agency Master File* report lists the details of the Agencies within the Manitou database. This report may include or exclude as much or as little information as desired.

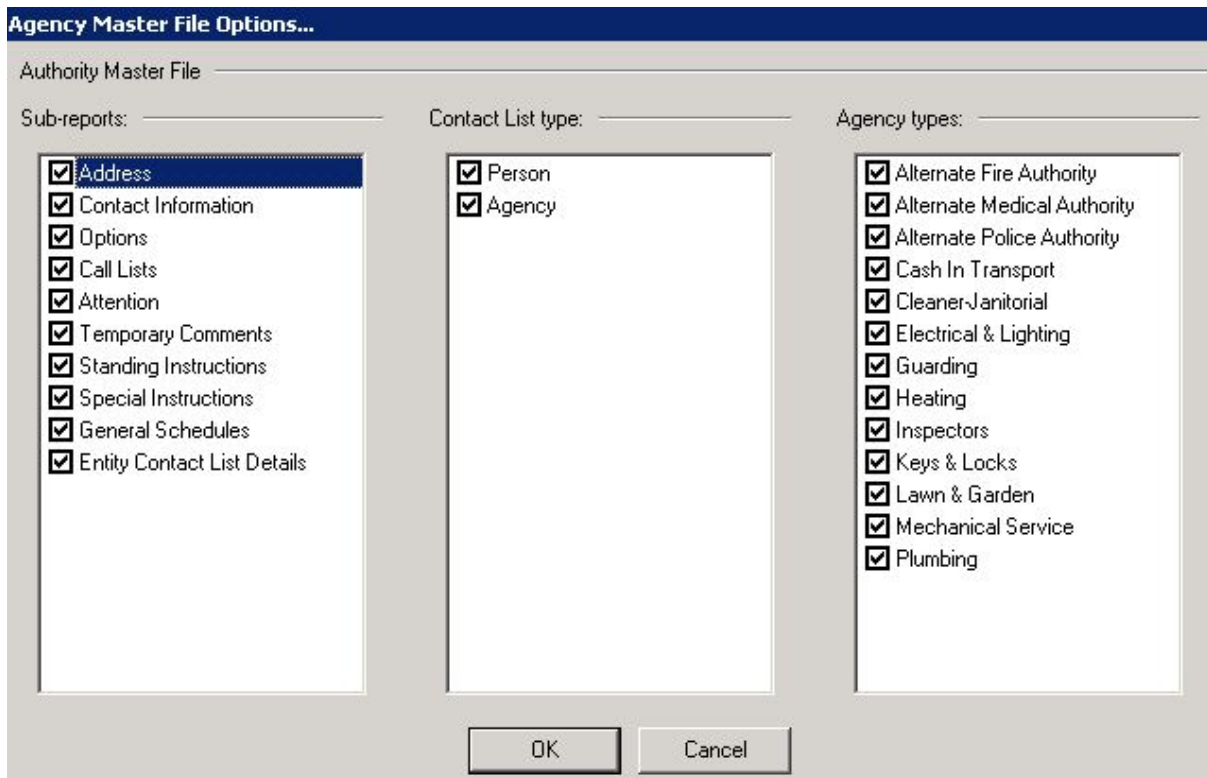


The image shows a software window titled "Agency Master File". At the top left is a small icon of a person wearing a hat. To the right of the icon, the text "Report Description:" is followed by a text box containing "Agency Master File". Further right, "Priority:" is followed by a text box containing "6". Below this, there are two columns of input fields. The left column is headed "From :" and the right column is headed "To :". Each column has four text boxes labeled "Agency ID", "Agency name", "City", and "Region". Each of these text boxes has a small magnifying glass icon to its right. Below the input fields, there are three checkboxes: "Mail format", "Suppress passwords", and "Page breaks". At the bottom right of the window is a button labeled "Options...".

Agency Master File Report form

## Search Options

Clicking on the **Options** button at the bottom right corner of the screen will bring up additional search options.



**Agency Master File Options...**

Authority Master File

Sub-reports: ☒ Address  
☒ Contact Information  
☒ Options  
☒ Call Lists  
☒ Attention  
☒ Temporary Comments  
☒ Standing Instructions  
☒ Special Instructions  
☒ General Schedules  
☒ Entity Contact List Details

Contact List type: ☒ Person  
☒ Agency

Agency types: ☒ Alternate Fire Authority  
☒ Alternate Medical Authority  
☒ Alternate Police Authority  
☒ Cash In Transport  
☒ Cleaner-Janitorial  
☒ Electrical & Lighting  
☒ Guarding  
☒ Heating  
☒ Inspectors  
☒ Keys & Locks  
☒ Lawn & Garden  
☒ Mechanical Service  
☒ Plumbing

OK Cancel

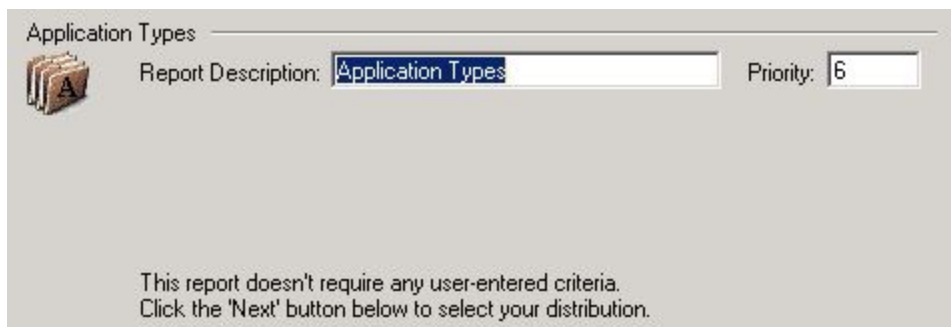
Agency Master File Options

The options allows for the selection of **Sub-reports**, **Contact Lists**, and **Agency types** to further narrow or expand the report results. To select none or all of the advanced options, simply right-click within each section and either click **Select All** or **Select None**.

Once the search parameters are set, click **Next** to continue running the report.

## Application Types

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



**Application Types**

Report Description:  Priority:

This report doesn't require any user-entered criteria.  
Click the 'Next' button below to select your distribution.

Application Types Report form

## Audio

The *Audio* report provides an itemized list of all audio devices types in the system.

Select **Audio** from the *Master File Reports* list in the *Reports* window.

Audio Report form

Select the report parameters or leave blank for a list of all types available.

07/13/2012 10:21

ID: BOLD

Audio Master File Report

Include: Details

<u>Type</u>	<u>Description</u>	<u>Access Type</u>	<u>Dialback</u>
MPAUDIO	Media Player Audio	Via Transmitter	

Audio Master File Report Example

Audio Master File Report Example

## Authority Master File

The *Authority Master File* report lists the details of the Authorities within the Manitou database. This report may include or exclude as much or as little information as desired.

Authority Master File

Report Description: Authority Master File Priority: 6

From : To :

Authority ID

Authority name

City

Region

☐ Suppress passwords

☐ Page breaks

Options...

Authority Master File Report form

## Search Options

Clicking on the **Options** button at the bottom right corner of the screen will bring up additional search options.

**Authority Master File Options...**

Authority Master File

Sub-reports:      Contact List type:      Authority types:

- ☒ Address
- ☒ Contact Information
- ☒ Options
- ☒ Call Lists
- ☒ Attention
- ☒ Temporary Comments
- ☒ Standing Instructions
- ☒ Special Instructions
- ☒ General Schedules
- ☒ Entity Contact List Details

- ☒ Person
- ☒ Authority

- ☒ Police
- ☒ Fire
- ☒ Medical

OK      Cancel

Authority Master File Report Options

The options allows for the selection of **Sub-reports**, **Contact Lists**, and **Agency types** to further narrow or expand the report results. To select none or all of the advanced options, simply right-click within each section and either click **Select All** or **Select None**.

Once the search parameters are set, click **Next** to continue running the report.

## Branch Master File

The *Branch Master File* report lists the details of the Branches within the Manitou database. This report may include or exclude as much or as little information as desired.

Branch Master File

Report Description: Branch Master File Priority: 6

From : To :

Branch ID

Branch name

City

Region

☐ Suppress passwords

☐ Page breaks

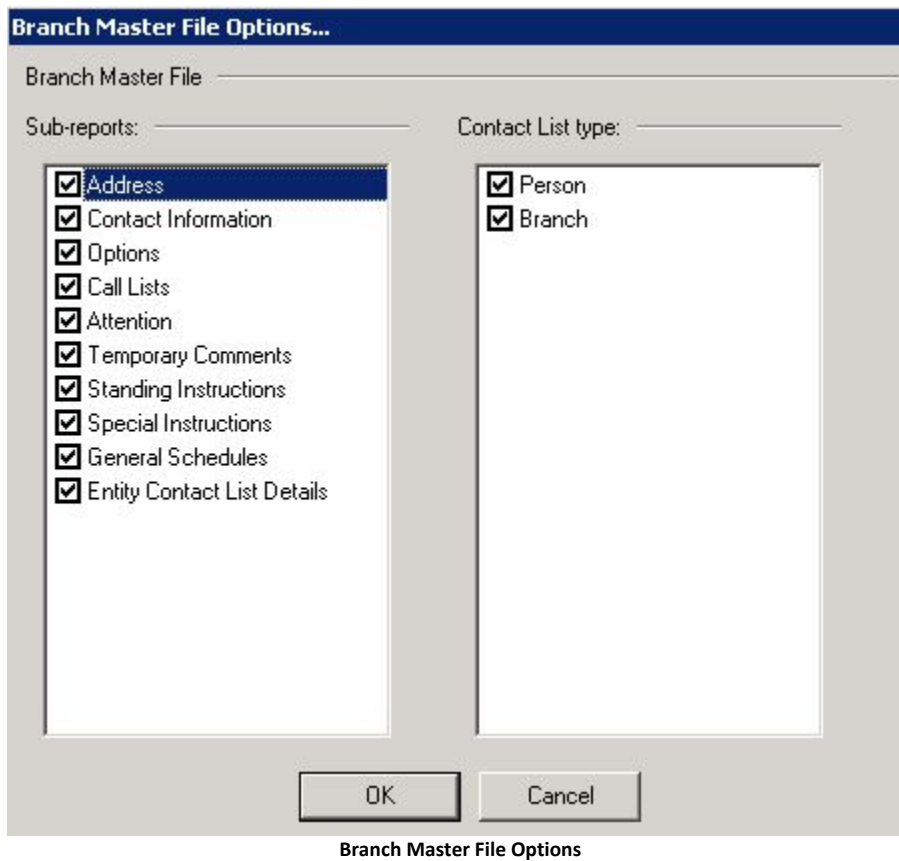
Options...

Branch Master File Report form

## Search Options

Clicking on the **Options** button at the bottom right corner of the screen will bring up additional search options.





The image shows a dialog box titled "Branch Master File Options...". It has two main sections: "Sub-reports:" on the left and "Contact List type:" on the right. The "Sub-reports:" section contains a list of items, each with a checked checkbox: Address, Contact Information, Options, Call Lists, Attention, Temporary Comments, Standing Instructions, Special Instructions, General Schedules, and Entity Contact List Details. The "Contact List type:" section contains a list with two items, each with a checked checkbox: Person and Branch. At the bottom of the dialog are "OK" and "Cancel" buttons. Below the dialog, the text "Branch Master File Options" is centered.

Branch Master File Options

The options allows for the selection of **Sub-reports**, **Contact Lists**, and **Agency types** to further narrow or expand the report results. To select none or all of the advanced options, simply right-click within each section and either click **Select All** or **Select None**.

Once the search parameters are set, click **Next** to continue running the report.

## Cities

The *Cities* report lists the cities based on entered criteria.

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

Cities

Report Description: Cities Priority: 6

From : To :

Region

City

Country

- ☒ United States of America
- ☒ Canada
- ☒ United Kingdom
- ☒ Germany
- ☒ New Zealand

Cities Report form

It is suggested to narrow the cities list by entering a region into the selection criteria. For databases with cities for every region, running the report by the defaults could impact the Report Server's ability to run other reports.

## 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 the user wishes to view class codes within a specific range, then criteria may be entered into the **Class From** and **To** fields.

Class Codes

Report Description: Class Codes Priority: 6

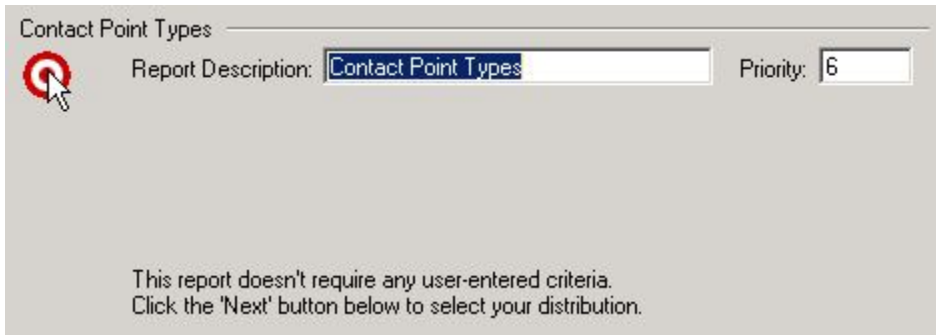
From : To :

Class

Class Codes Report form

## Contact Point Types

The *Contact Point Types* report lists all the different Contact point types available within the Manitou system. These include telephone numbers, emails addresses, SMS numbers, pager and fax numbers, and web addresses. There is no user entered criteria because the report only has one output.



Contact Point Types

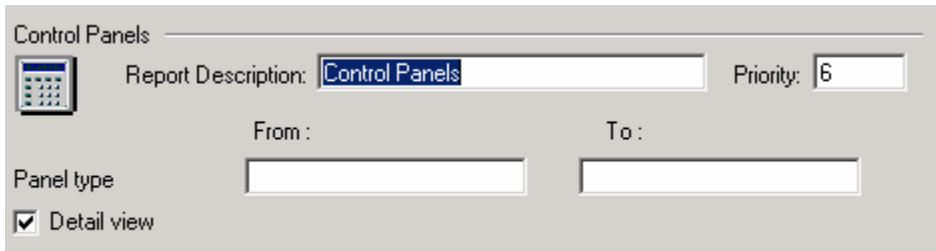
Report Description:  Priority:

This report doesn't require any user-entered criteria.  
Click the 'Next' button below to select your distribution.

Contact Point Types Report form

## 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, users may enter search criteria in the **From** and **To** fields as well as specify a detailed view, if desired.



Control Panels

Report Description:  Priority:

From :  To :

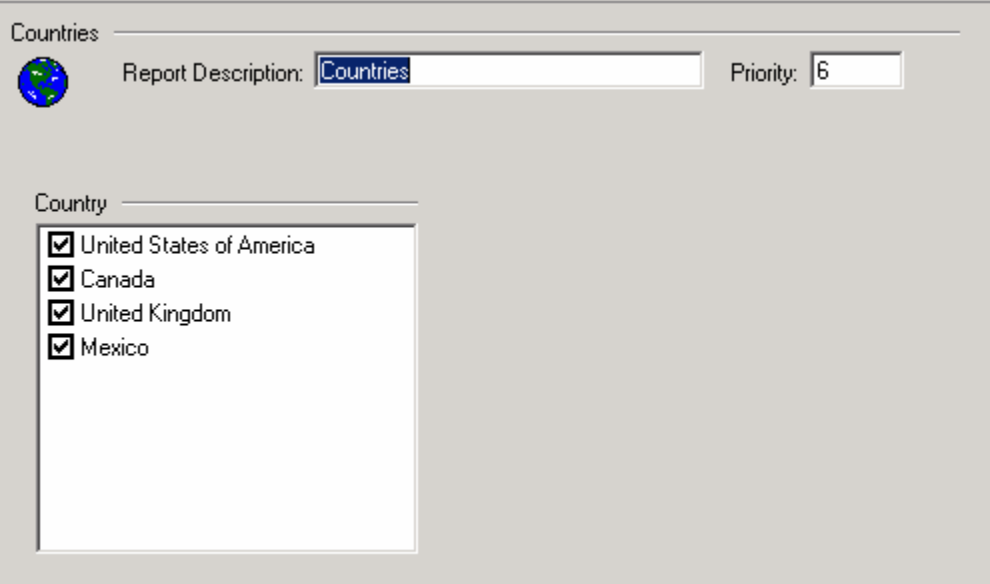
Panel type

☒ Detail view

Control Panels Report form

## Countries

The *Countries* report produces the country details available in the Supervisor Workstation. Most companies will only have one country; however, if necessary, this report may 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.



Countries

Report Description: Countries Priority: 6

Country

- ☒ United States of America
- ☒ Canada
- ☒ United Kingdom
- ☒ Mexico

Countries Report form

## Customer Master File

The Customer Master File report contains all the data housed within the [Customer](#) form. Operators may adjust the report parameters to view as much or as little of the customer information as desired. 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.

*📁 The Customer Master File report may be run in several forms to provide account-specific details from customer records.*

Customer Master File

Report Description:  Priority:

From : To :

Customer ID

Customer name

Dealer ID

Branch ID

Group

Class

☐ Commission date

☐ Create date

☐ Last update date

☐ Marked for reprint

☐ Reset reprint flag after publishing to printer

☐ Suppress passwords

☐ Suppress AR No.

☐ Mail format

☒ Page breaks

Monitoring status

☒ Pending

☒ Inactive

☒ Active

☒ Deactivated

Customer Master File Report form

## Explanation of 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 checkbox on the customer save notes dialog that is checked “Mark customer for reprint” 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 checked.
- **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" box is checked.
- **Suppress Passwords** – This will change the passwords 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 unchecked. Mailing format assumes page breaks therefore there is no need for the additional checkbox.
- **Page Breaks** – This checkbox will force page breaks between the group by options.

## Search Options

The *Options* window, accessed by clicking the **Options** button on the *Customer Master File* report screen, allows for the selection or de-selection of **Sub-reports** and **Contact lists** to further narrow or expand the report result as well as grouping and ordering options.

**Customer Master File Options**

Customer Master File

Sub-reports to include:

- ☒ Programming
  - ☒ Transmitter prog defaults
  - ☒ Event prog defaults
- ☒ System Linking
- ☒ Areas & Zones
- ☒ Sectors
- ☒ Readers
- ☒ Devices
- ☒ System Assets
- ☒ Reminders
- ☒ Services
- ☒ Schedules
- ☒ Entity Contact List Details
- ☒ Call Lists
- ☒ Attention
- ☒ Permits
- ☒ Temporary Comments

Contact list types:

- ☒ Person
- ☒ Dealer
- ☒ Branch
- ☒ Agency
- ☒ Authority
- ☒ Customer

Group by: ☐ Customer ☐ Dealer ☐ Branch

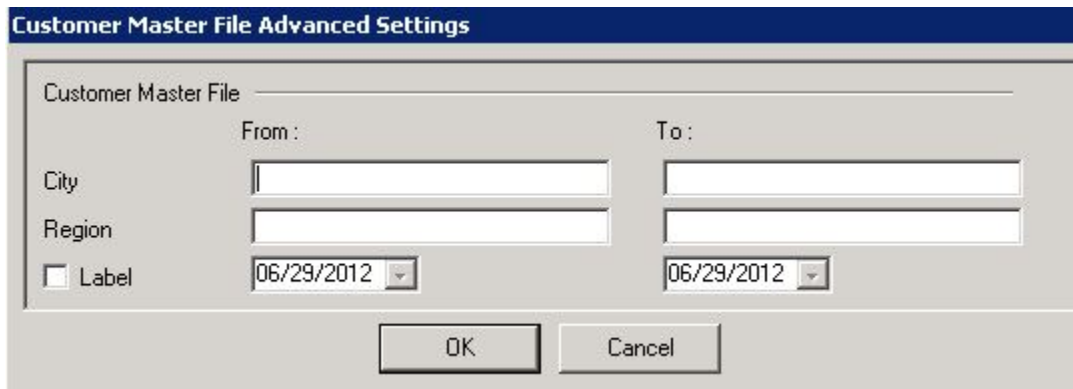
Order by: ☒ Customer ID ☐ Customer Name

OK Cancel

Customer Master File Options

## Advanced Search Options

The *Advanced Settings* form allows users to entire search criteria pertaining to a specific city or region in which certain customers reside.



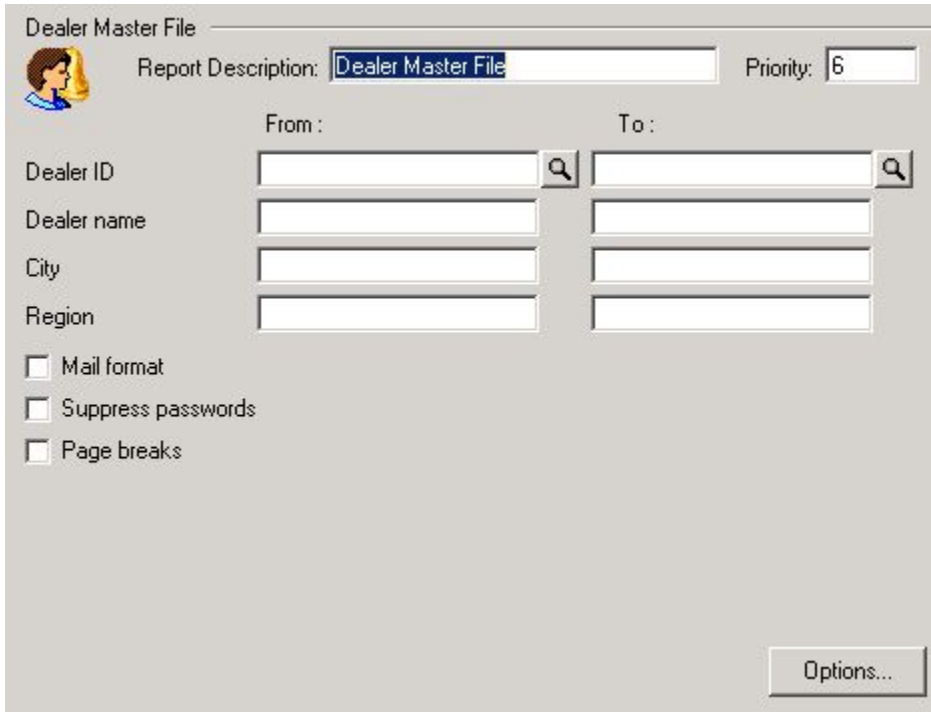
The dialog box is titled "Customer Master File Advanced Settings". It contains a section labeled "Customer Master File" with two columns of input fields. The left column has fields for "City", "Region", and a checkbox labeled "Label". The right column has fields for "From :", "To :", and a date dropdown menu. The "From :" and "To :" fields are empty, while the date dropdown menu shows "06/29/2012". At the bottom of the dialog are "OK" and "Cancel" buttons.

Customer Master File Advanced Options

Once the search parameters are set, click **Next** to continue running the report.

## 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.

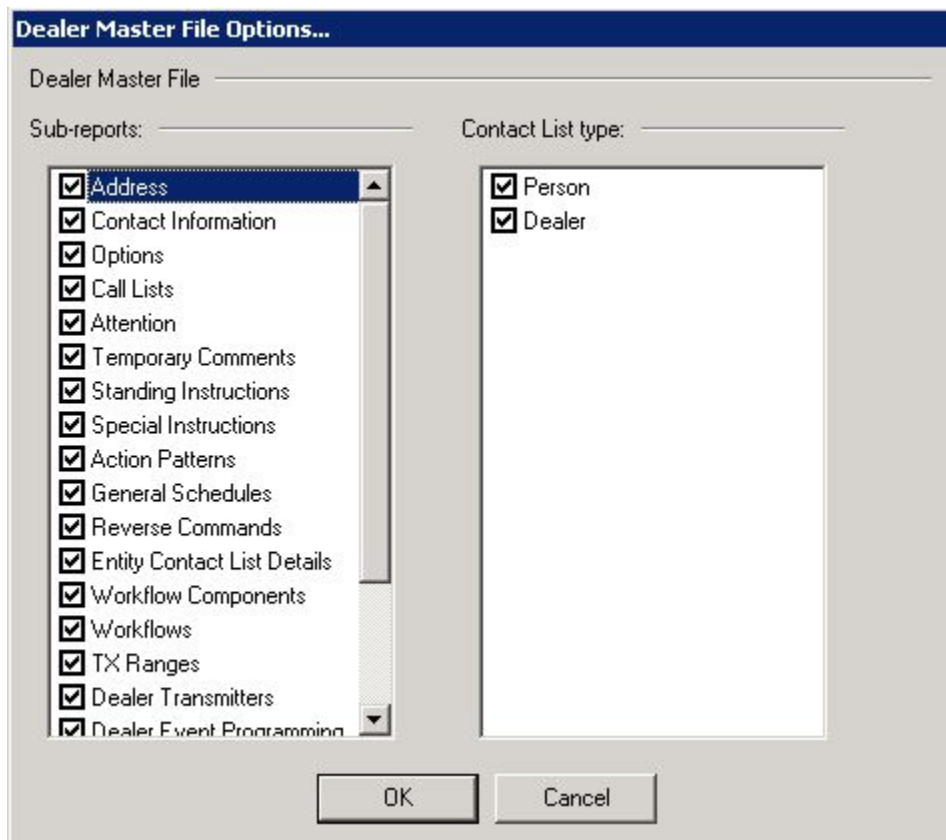


The form is titled "Dealer Master File" and includes a small icon of a person. It has a "Report Description:" field containing "Dealer Master File" and a "Priority:" field containing "6". Below these are two columns of input fields. The left column has fields for "Dealer ID", "Dealer name", "City", and "Region". The right column has fields for "From :", "To :", and a date dropdown menu. The "From :" and "To :" fields are empty, while the date dropdown menu shows "06/29/2012". At the bottom of the form are three checkboxes: "Mail format", "Suppress passwords", and "Page breaks". An "Options..." button is located at the bottom right of the form.

Dealer Master File Report form

## Search Options

The *Options* window, accessed by clicking the **Options** button on the *Dealer Master File* report screen, allows for the selection or de-selection of **Sub-reports** and **Contact lists** to further narrow or expand the report result as well as grouping and ordering options.




Dealer Master File Report Options

Once the search parameters are set, click **Next** to continue running the report.

## DNIS Maps

The *DNIS Maps* report will display mappings used within the system.

 *DNIS stands for Dialed Number Identification Service.*



DNIS Maps

Report Description:  Priority:

From :  To :

Monitoring Group

Dealer ID

Rec. Line Prefix:

- ☒ BURG - Burglary Panels
- ☒ DEF - Default
- ☒ FIRE - Fire Panels
- ☒ WP - WIN-PAK

DNIS Maps Report form

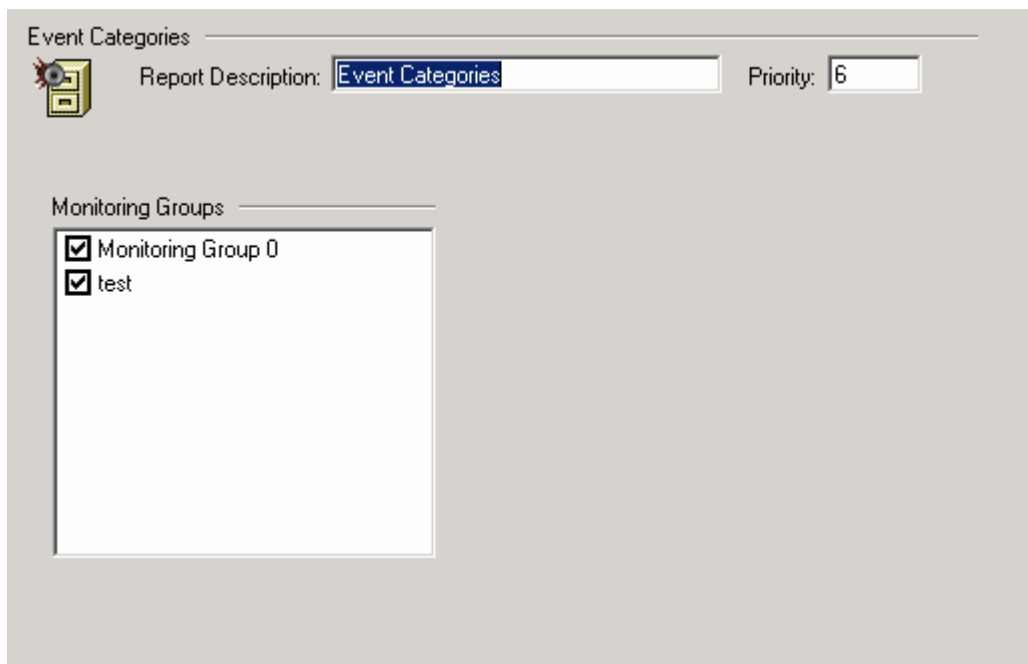
Users may search by **Receiver Line Prefix**, **Monitoring Group**, or **Dealer ID**.

Once the search parameters are set, click **Next** to continue running the report.

## 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 will be based on the Monitoring Group.

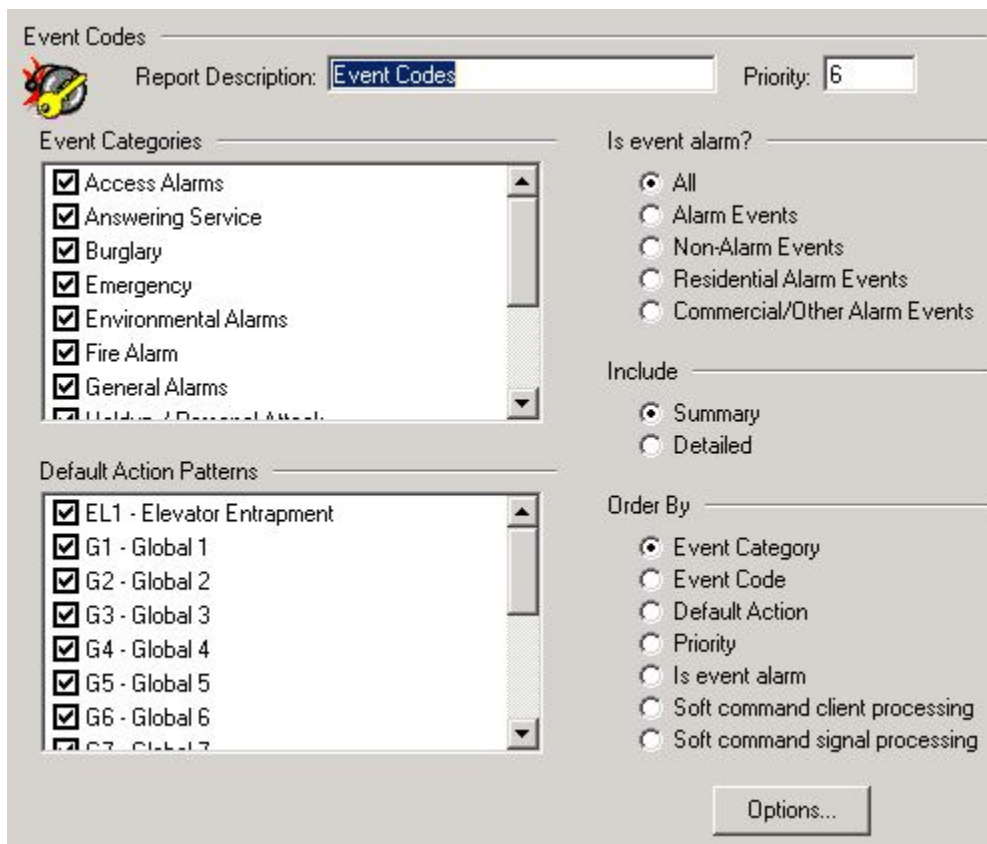


The image shows a software window titled "Event Categories". At the top left is a small icon of a yellow box with a red starburst. To its right is a "Report Description:" label followed by a text input field containing "Event Categories". Further right is a "Priority:" label followed by a text input field containing "6". Below these fields is a section titled "Monitoring Groups" which contains a list box with two items: "Monitoring Group 0" and "test", both of which have their checkboxes selected.

Event Categories report form

## 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 it is highly recommended to narrow the results by selecting specific search criteria.



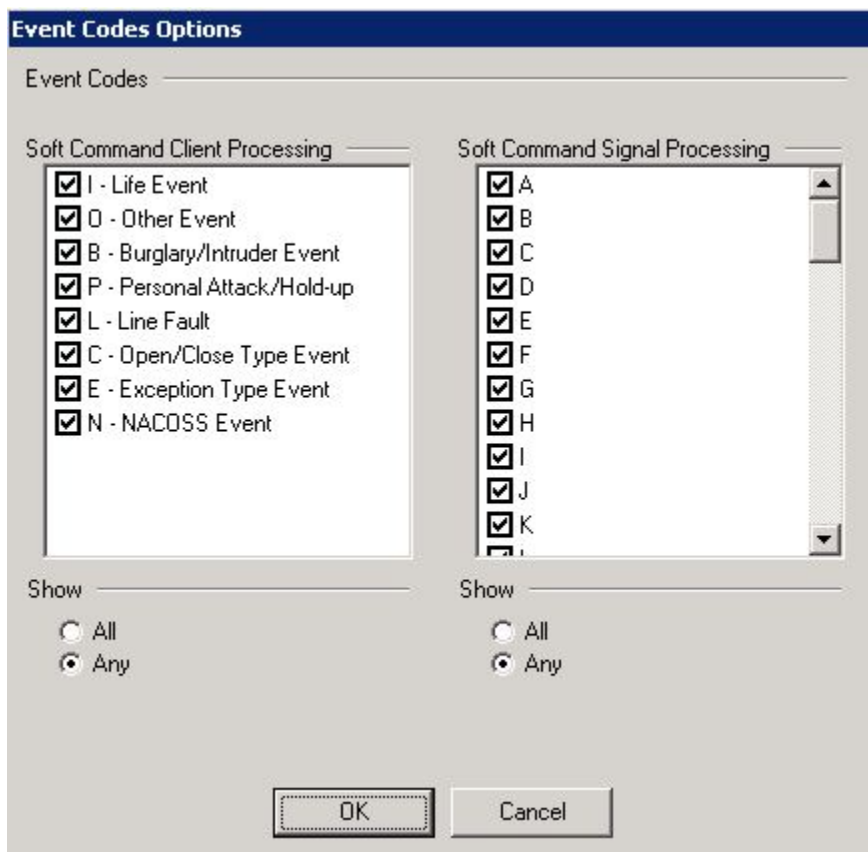
The screenshot shows the 'Event Codes' report configuration window. At the top, there's a title bar 'Event Codes' and a report description field containing 'Event Codes'. To the right is a 'Priority' field with the value '6'. Below the title bar, there are two main sections. The left section, 'Event Categories', contains a list of categories with checkboxes: Access Alarms, Answering Service, Burglary, Emergency, Environmental Alarms, Fire Alarm, General Alarms, and Holdup / Personal Attack. The right section, 'Is event alarm?', has radio buttons for 'All', 'Alarm Events', 'Non-Alarm Events', 'Residential Alarm Events', and 'Commercial/Other Alarm Events'. Below this is an 'Include' section with radio buttons for 'Summary' and 'Detailed'. At the bottom right is an 'Options...' button. The bottom section, 'Default Action Patterns', contains a list of patterns with checkboxes: EL1 - Elevator Entrapment, G1 - Global 1, G2 - Global 2, G3 - Global 3, G4 - Global 4, G5 - Global 5, G6 - Global 6, and G7 - Global 7.

Event Codes Report form

Users can narrow search results by selecting or de-selecting specific **Event Categories** (such as Burglary, Fire Alarm, etc.) The report may be ordered by certain criteria and configured to include summaries and details as well.

## Search Options

Clicking the **Options** button at the bottom right corner of the *Event Codes* report screen will bring up additional search options.



Event Codes Report Options

When using the option to narrow the search by **Event Code** (alarm type), it is possible to select one or several event codes by selecting or de-selecting from the lists of **Soft Commands** and specifying what to **Show** to get the results requested.

Once the search parameters are set, click **Next** to continue running the report.

## Event Maps

The *Event Maps* report shows the relationship of how a signal arrives into 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 may streamline the report by selecting **Dealer ID** and choosing Protocol **Types** as well as how the report is grouped.

Event Maps

Report Description:  Priority:

From :  To :

Dealer ID

Protocol Type:  Group By: ☐ Protocol ☐ Installer

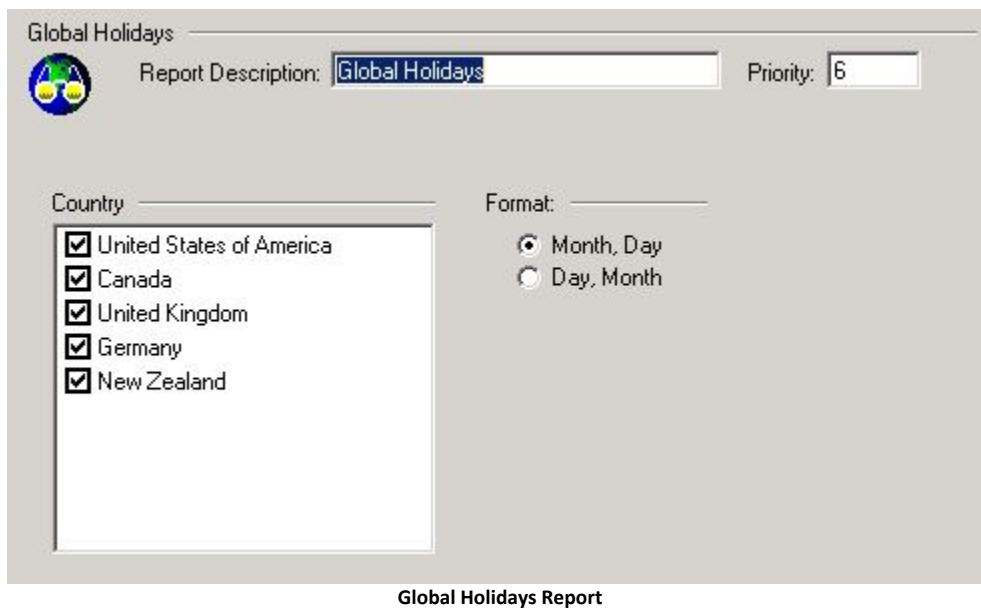
- ☒ ACID - Ademco Contact ID
- ☒ ACRON - Acron Super Fast
- ☒ ASLOW42 - Slow (4x2, 4...
- ☒ CERNIUM - Cernium Che...
- ☒ CFSK - CFSK
- ☒ COND - System Condition
- ☒ DMP - Digital Monitoring ...
- ☒ EMIZON - Emizon
- ☒ EUROPLEX - Europlex
- ☒ FBI - FBI Superfast
- ☒ FSK2 - Silent Knight FSK 2
- ☒ ISI - ISI
- ☒ LIFELINE - Lifeline
- ☒ MANUAL - Manual
- ☒ MODEM2E - Radionics ...
- ☒ MORSE - Morse
- ☒ OZVISION - Ozvision
- ☒ RAD6000 - Radionics 60...
- ☒ RAD6000 - Radionics 60...

Event Maps Report form

Once the search parameters are set, click **Next** to continue running the report.

## Global Holidays

The *Global Holiday* report lists the entered global holidays listed within the Manitou system by country. Users may simply select which countries they wish to view global holidays, as well as the format (**Month, Day** or **Day, Month**) in which the report will format the report results.

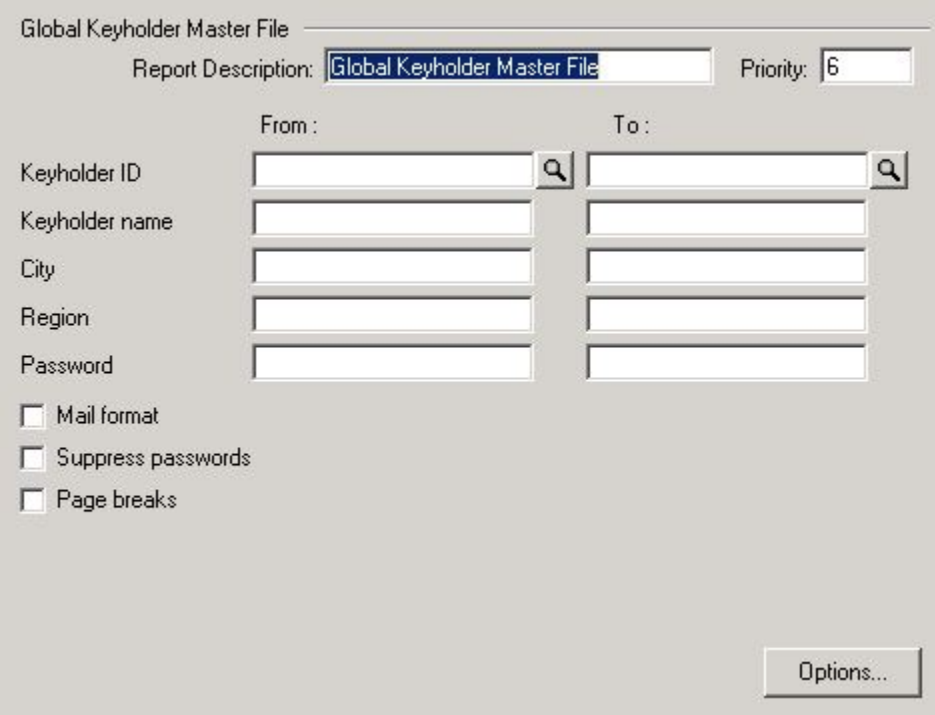


The screenshot shows a software window titled "Global Holidays". At the top left is a globe icon. To its right is a "Report Description:" label followed by a text box containing "Global Holidays". Further right is a "Priority:" label followed by a text box containing "6". Below these are two sections. The "Country:" section on the left contains a list box with five entries, each preceded by a checked checkbox: "United States of America", "Canada", "United Kingdom", "Germany", and "New Zealand". The "Format:" section on the right contains two radio button options: "Month, Day" (which is selected) and "Day, Month". At the bottom center of the window is the text "Global Holidays Report".

Once the search parameters are set, click **Next** to continue running the report.

## Global Keyholder Master File

The *Global Keyholder* report lists the Keyholders that have Contact IDs tied to their information. It is suggested to run this report without parameters to produce the best results. The report may be customized to display as little or as much information as necessary.



Global Keyholder Master File

Report Description:  Priority:

From :   To :

Keyholder ID

Keyholder name

City

Region

Password

☐ Mail format

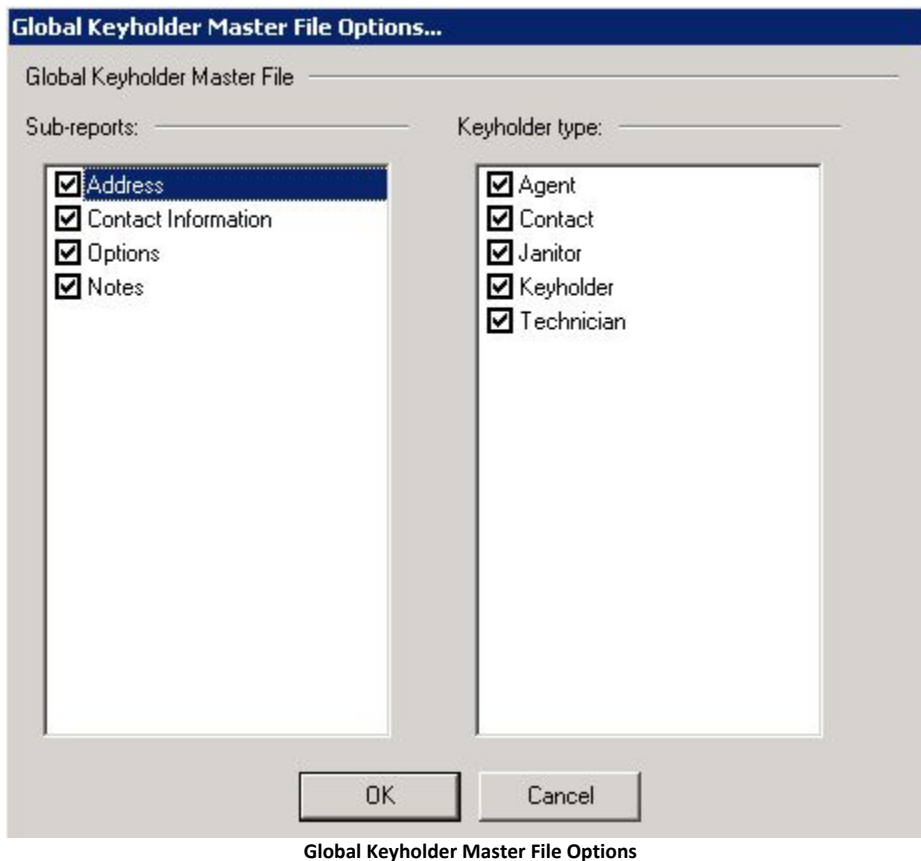
☐ Suppress passwords

☐ Page breaks

Global Keyholder Master File Report form

## Search Options

Clicking on the **Options** button at the bottom right corner of the screen will bring up additional search options.



**Global Keyholder Master File Options...**

Global Keyholder Master File

Sub-reports: ☒ Address ☒ Contact Information ☒ Options ☒ Notes

Keyholder type: ☒ Agent ☒ Contact ☒ Janitor ☒ Keyholder ☒ Technician

OK Cancel

Global Keyholder Master File Options

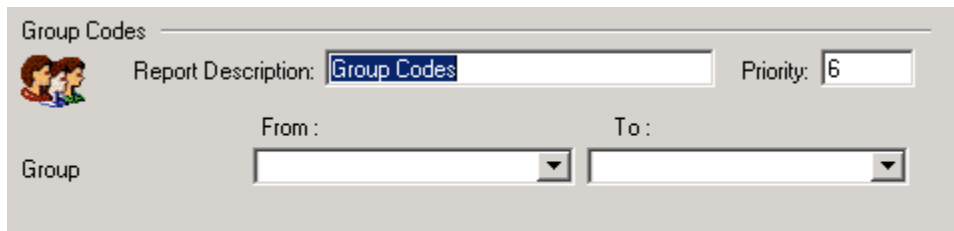
The *Options* window allows for the selection or de-selection of **Sub-reports** and **Keyholder types** to further narrow or expand the report results.

Once the search parameters are set, click **Next** to continue running the report.

## Group Codes

The *Group Codes* report lists the Group Codes for the Manitou System.

Group Codes are used 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 menu and click **Next** to continue running the report.



Group Codes

Report Description:  Priority:

From:  To:

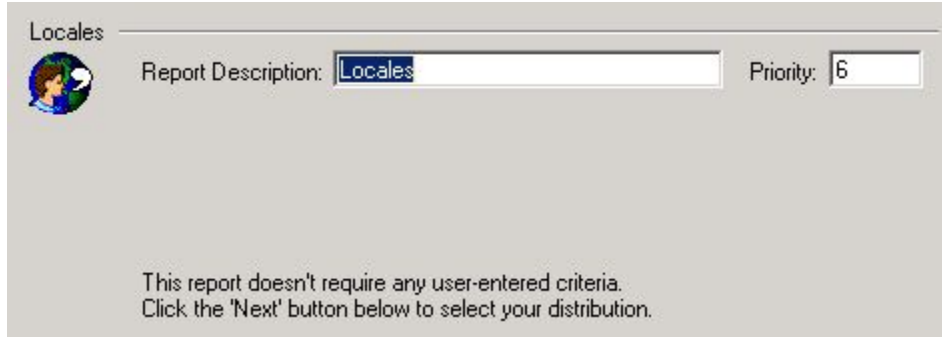
Group

Group Codes report form



## 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.

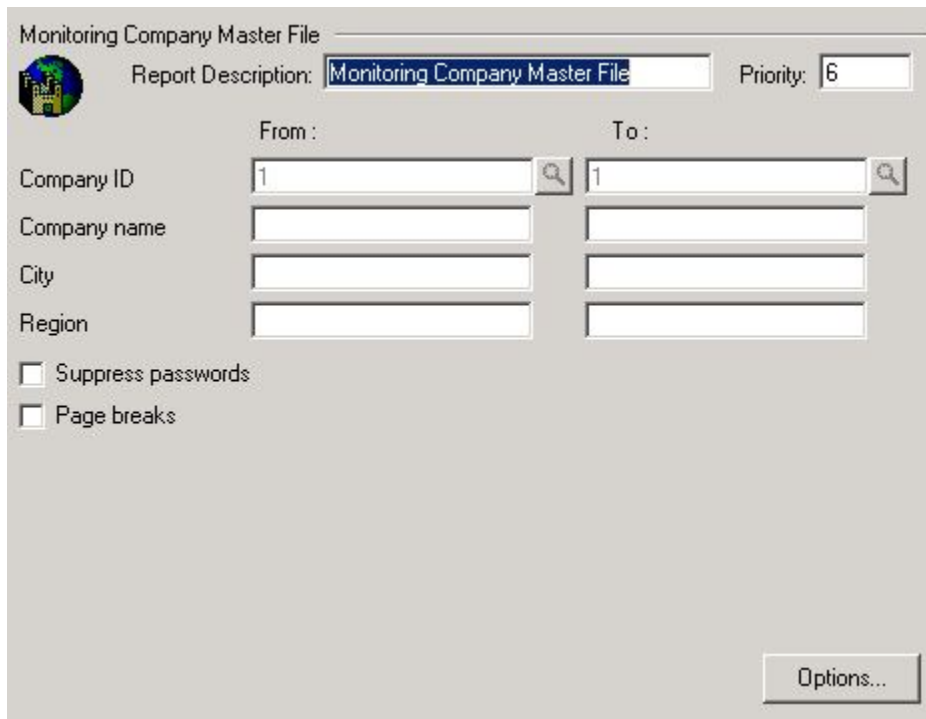
The screenshot shows a software window titled "Locales". On the left is a small globe icon. To its right, the "Report Description:" label is followed by a text box containing the word "Locales". Further right, the "Priority:" label is followed by a text box containing the number "6". Below these fields, a message states: "This report doesn't require any user-entered criteria. Click the 'Next' button below to select your distribution."

Locales Report form

To continue running the report, click **Next**.

## Monitoring Company Master File

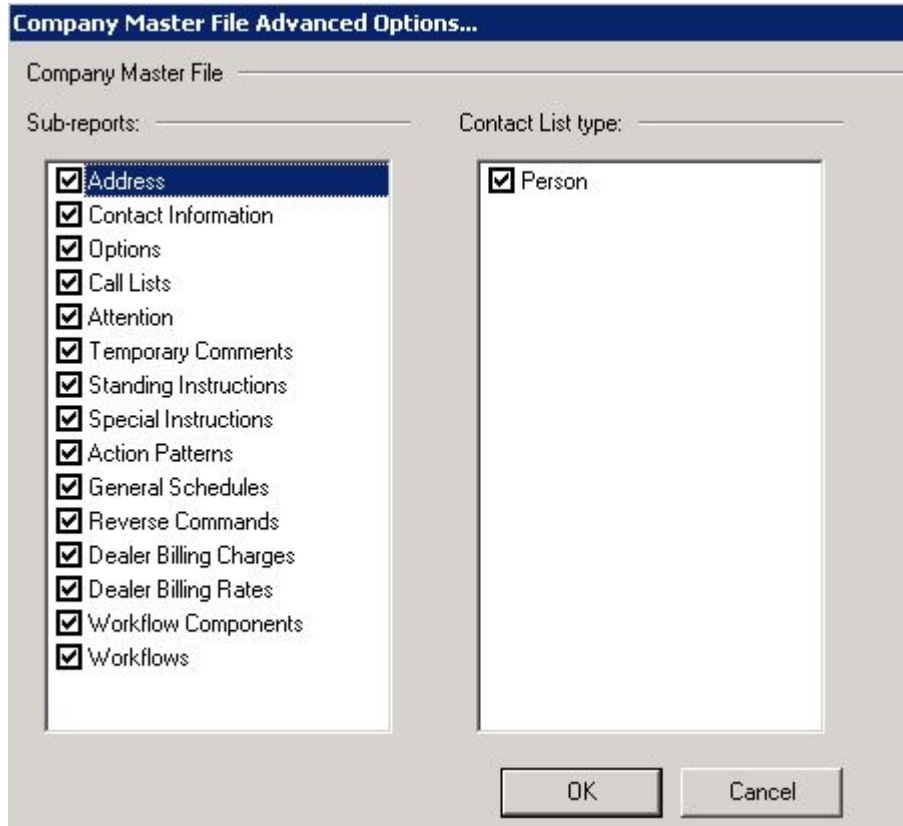
Like the [Customer Master File](#), the *Monitoring Company Master File* report produces details of the [Monitoring Company](#) record. Users may adjust the report parameters to view as much or as little of the information as desired. The report is designed to have a reference if the Monitoring Company data has been lost and it is necessary to enter the data back into Manitou.

The screenshot shows a software window titled "Monitoring Company Master File". On the left is a small globe icon. To its right, the "Report Description:" label is followed by a text box containing "Monitoring Company Master File". Further right, the "Priority:" label is followed by a text box containing "6". Below these fields, there are two columns of input fields. The first column is headed "From :" and the second is headed "To :". Each column has four text boxes labeled "Company ID", "Company name", "City", and "Region". The "Company ID" boxes contain the number "1" and have a magnifying glass icon to their right. Below the input fields, there are two checkboxes: "Suppress passwords" and "Page breaks", both of which are currently unchecked. At the bottom right of the window is a button labeled "Options..."

Monitoring Company Master File Report

## Search Options

Clicking on the **Options** button at the bottom right corner of the screen will bring up additional search options.



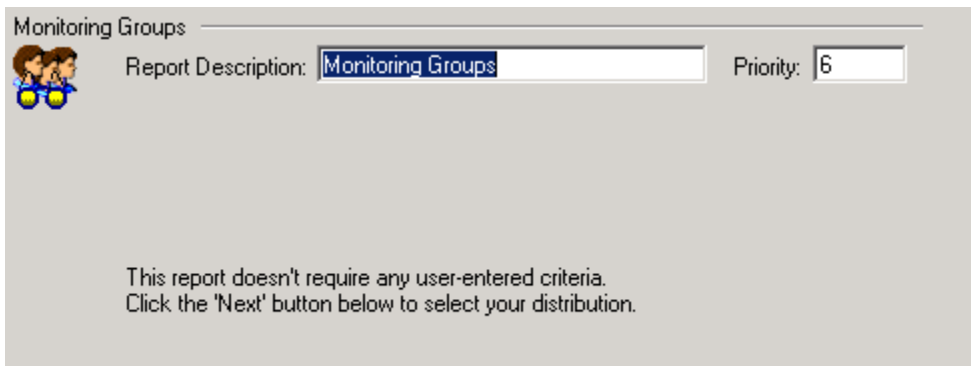
Monitoring Company Master File Search Options

The *Options* window allows for the selection or de-selection of **Sub-reports** and **Contact List types** to further narrow or expand the report results.

Once the search parameters are set, click **Next** to continue running the report.

## Monitoring Groups

The *Monitoring Groups* report will display a list of all current Monitoring Groups.



Monitoring Groups

Report Description:  Priority:

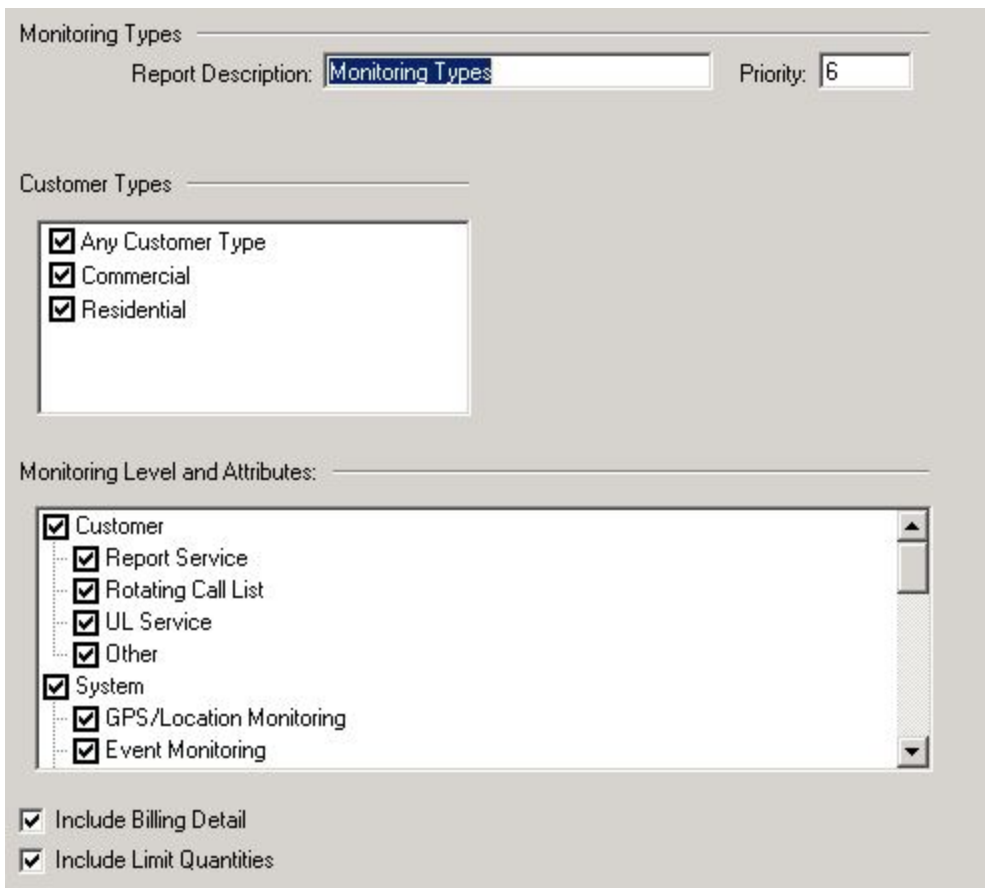
This report doesn't require any user-entered criteria.  
Click the 'Next' button below to select your distribution.

Monitoring Groups Report form

Since this report does not require any user-entered criteria, simply click **Next** to begin running the report.

## Monitoring Types

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



Monitoring Types

Report Description:  Priority:

Customer Types

- ☒ Any Customer Type
- ☒ Commercial
- ☒ Residential

Monitoring Level and Attributes:

- ☒ Customer
  - ☒ Report Service
  - ☒ Rotating Call List
  - ☒ UL Service
  - ☒ Other
- ☒ System
  - ☒ GPS/Location Monitoring
  - ☒ Event Monitoring

☒ Include Billing Detail

☒ Include Limit Quantities

Monitoring Types Report form

Users have the option to select **Customer Type** (residential, customer, etc.) and **Monitoring**

**Levels** such as Customer, System, Transmitter, etc.

Once the parameters have been entered, click **Next** to begin running the report.

## 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.

Output Device Types

Report Description:  Priority:

Attributes

- ☒ Phone
- ☒ Fax
- ☒ Pager
- ☒ Email Address
- ☒ Web Address
- ☒ Retransmission

Type

- ☒ Numeric Pager
- ☒ Alpha Pager
- ☒ SMS Phone
- ☒ Fax
- ☒ E-Mail
- ☒ Printer
- ☒ Retransmission

Protocol

- ☒ TAP
- ☒ DTMF
- ☒ SMS
- ☒ Fax
- ☒ MAPI
- ☒ Text

Group by:

- ☒ None
- ☐ Attribute
- ☐ Type
- ☐ Protocol

Output Device Types Report form

Users may choose to filter the report by differing **Attributes**, such as phone, fax, or e-mail, as well as **Types** and **Protocols**. The report results can be grouped by attributes, types and protocols.

Once the search parameters have been set, click **Next** to continue running the report.

## 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.

Permit Types

Report Description:  Priority:

Country

- ☒ United States of America
- ☒ Canada
- ☒ United Kingdom
- ☒ England
- ☒ Mexico

Authority Type

- ☒ Police
- ☒ Fire
- ☒ Medical

Permit Type

- ☒ General
- ☒ (Police) Intruder
- ☒ (Police) PA
- ☒ (Police) Line Fault
- ☒ Other

Group by:

- ☒ Country
- ☐ Authority Type
- ☐ Permit Type

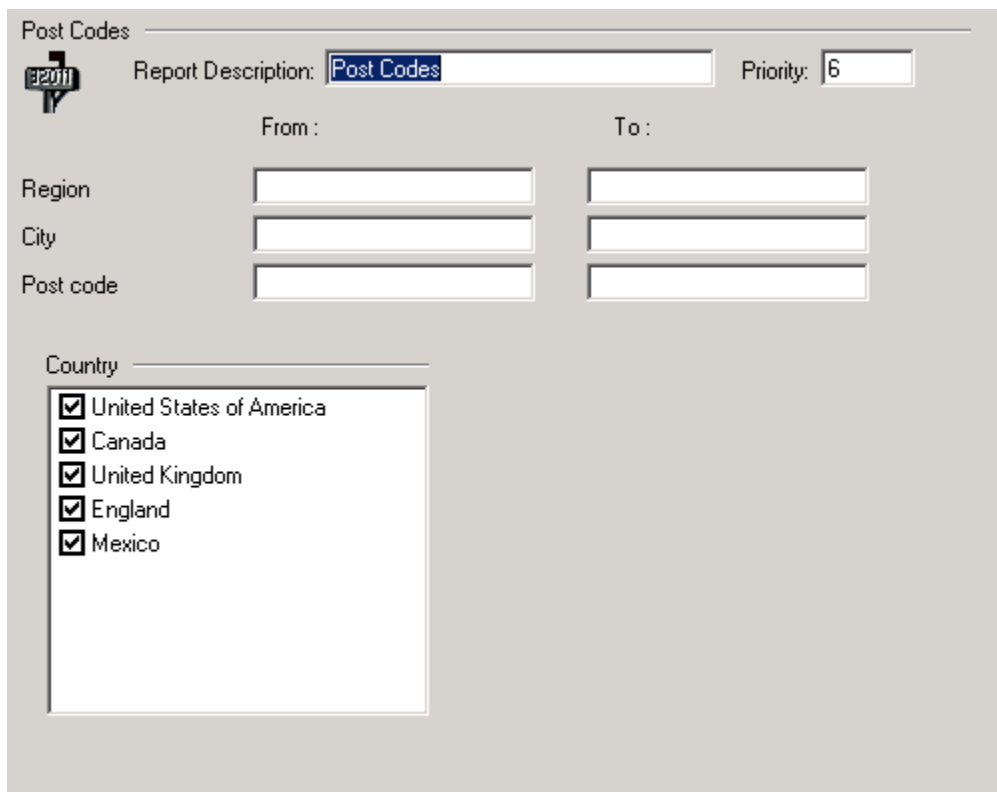
Permit Types report form

Users may choose to limit the search by **Country**, **Authority Type** or **Permit Type**. The report may be grouped by those categories as well.

Once the search parameters are set, click **Next** to continue running the report.

## Post Codes

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



Post Codes

Report Description:  Priority:

From:  To:

Region:

City:

Post code:

Country

- ☒ United States of America
- ☒ Canada
- ☒ United Kingdom
- ☒ England
- ☒ Mexico

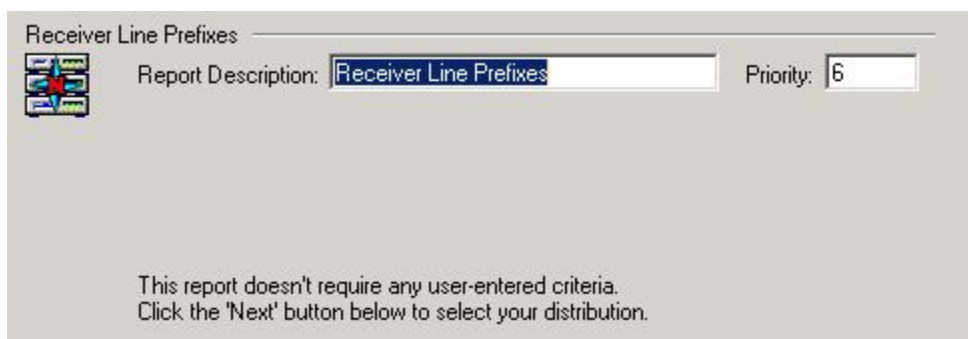
Post Codes Report forms

Users may limit the report to one or more countries.

Once the search parameters have been set, click **Next** to continue running the report.

## Receiver Line Prefixes

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



Receiver Line Prefixes

Report Description:  Priority:

This report doesn't require any user-entered criteria.  
Click the 'Next' button below to select your distribution.


Receiver Line Prefixes Report form

This report does not require any user-entered information.

To continue running the report, click **Next**.

## Receiver Types

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

The image shows a software window titled "Receiver Types". On the left side of the window, there are three small, stacked icons. To the right of the icons, the text "Report Description:" is followed by a text input field containing the words "Receiver Types". Further to the right, the text "Priority:" is followed by a small numeric input field containing the number "6". At the bottom of the window, there is a block of text that reads: "This report doesn't require any user-entered criteria. Click the 'Next' button below to select your distribution." The entire window has a light gray background and a standard title bar.

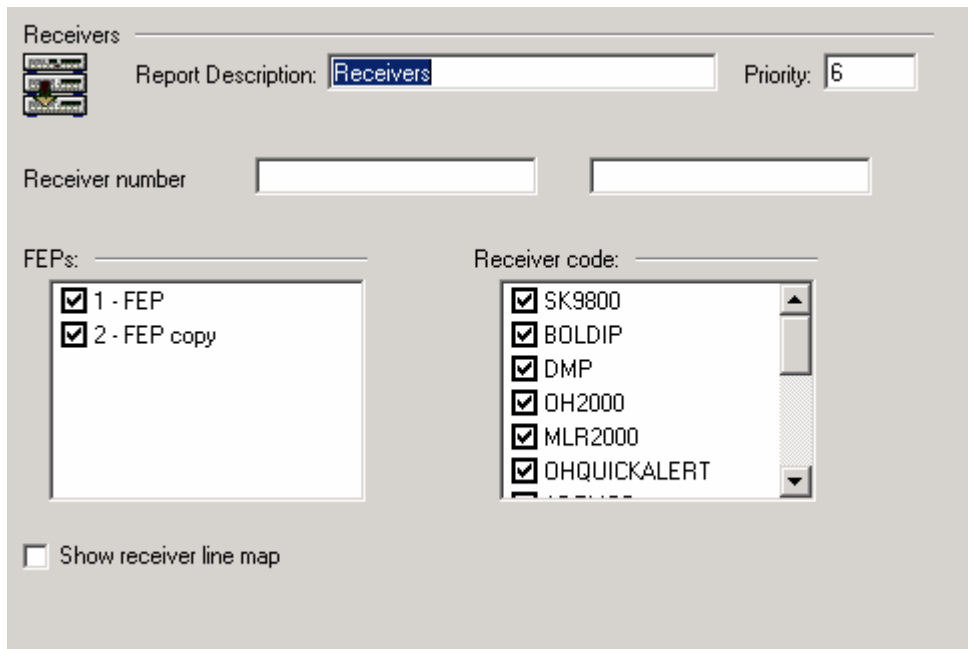
Receiver Types Report form

This report does not require any user-entered information.

To continue running the report, click **Next**.

## Receivers

The *Receivers* report provides a detailed list of configuration criteria of each type of Receiver for each FEP. The report includes the Receiver number, code, Receiver description, type, Port, Settings, Default Line Prefix, Default Monitoring Group, Line Prefix and Transmitter ID.



Receivers

Report Description:  Priority:

Receiver number

FEPs:

- ☒ 1 - FEP
- ☒ 2 - FEP copy

Receiver code:

- ☒ SK9800
- ☒ BOLDIP
- ☒ DMP
- ☒ OH2000
- ☒ MLR2000
- ☒ OHQUICKALERT

☐ Show receiver line map

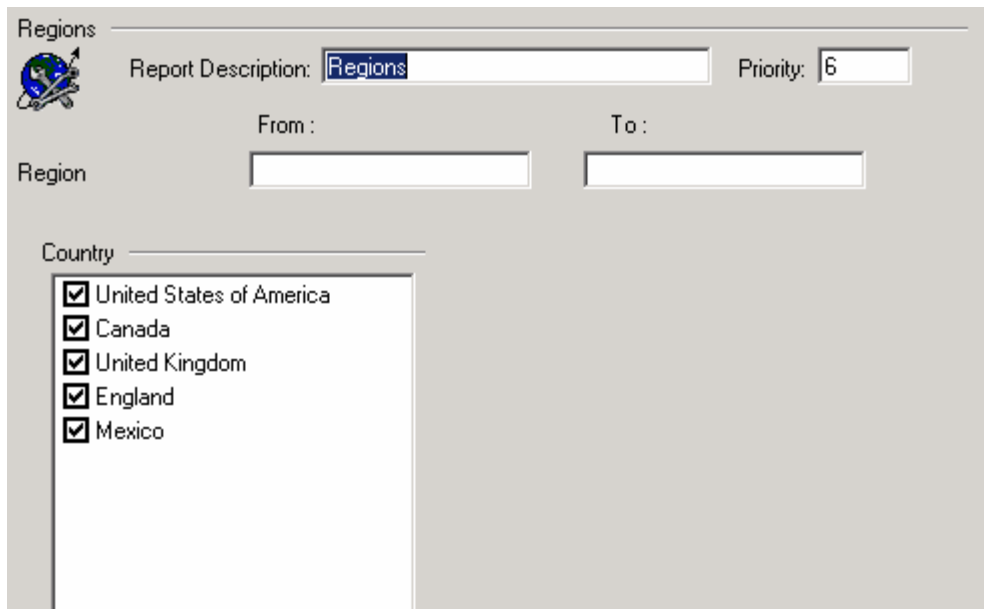
Receivers Report form

Users may choose to limit the report to one specific **FEP** or a particular **Receiver code**.

Once the search parameters have been set, click **Next** to continue running the report.

## Regions

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



Regions

Report Description:  Priority:

From :  To :

Region

Country

- ☒ United States of America
- ☒ Canada
- ☒ United Kingdom
- ☒ England
- ☒ Mexico

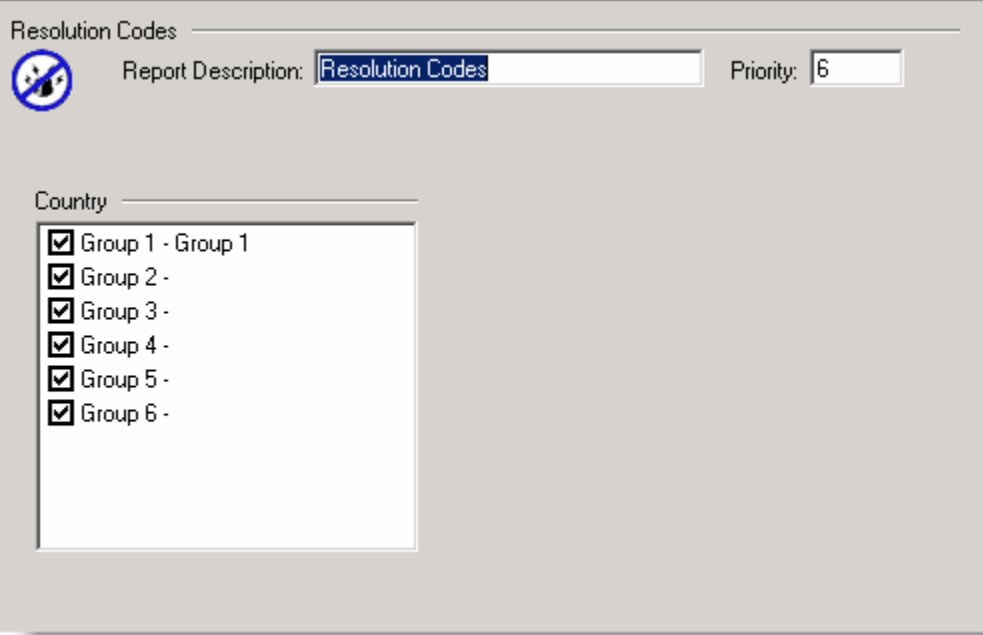


Users may choose to enter a specific **Region** or limit the report to a particular **Country**.

Once the search parameters have been met, click **Next** to continue running the report.

## 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 may wish to use this report as a listing of alarms or signals closed with a specific resolution code, such as false alarms.



Resolution Codes

Report Description: Resolution Codes Priority: 6

Country

- ☒ Group 1 - Group 1
- ☒ Group 2 -
- ☒ Group 3 -
- ☒ Group 4 -
- ☒ Group 5 -
- ☒ Group 6 -

Resolution Code report form

Once the search parameters have been met, click **Next** to continue running the report.

## 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.

Reverse Channel Routes

Report Description:  Priority:

From :  To :

Dealer ID

Receiver Line Prefix	Application Type	Protocol
<input checked="" type="checkbox"/> 00 - default	<input checked="" type="checkbox"/> Broker	<input checked="" type="checkbox"/> 1 - Red Care
<input checked="" type="checkbox"/> 01 - Dealer Acc...	<input checked="" type="checkbox"/> Sentry	<input checked="" type="checkbox"/> 2 - MonTech
<input checked="" type="checkbox"/> 02 - sfadfdssfd01	<input checked="" type="checkbox"/> Marshaller	<input checked="" type="checkbox"/> 3 - Director
<input checked="" type="checkbox"/> 03 - New Prefix01	<input checked="" type="checkbox"/> Application Server	<input checked="" type="checkbox"/> 4 - BT ADACS
<input checked="" type="checkbox"/> 04 - RLD 04	<input checked="" type="checkbox"/> Report Server	<input checked="" type="checkbox"/> 5 - HID Access ...
<input checked="" type="checkbox"/> 06 - RLD - 06	<input checked="" type="checkbox"/> Publisher	<input checked="" type="checkbox"/> 8 - RedCare NGr
<input checked="" type="checkbox"/> 07 - RLD 07	<input checked="" type="checkbox"/> Signal Handler	<input checked="" type="checkbox"/> 9 - RSI Frontel GI
<input checked="" type="checkbox"/> 83 - RLD - 83	<input checked="" type="checkbox"/> Logger	<input checked="" type="checkbox"/> 100 - AdPro Fas...
<input checked="" type="checkbox"/> H1 - RLD H1	<input checked="" type="checkbox"/> VRT	
<input checked="" type="checkbox"/> H2 - RLD H2	<input checked="" type="checkbox"/> Dispatcher	
<input checked="" type="checkbox"/> H3 - RLD H3	<input checked="" type="checkbox"/> FEP	
<input checked="" type="checkbox"/> HAWK - Hawk	<input checked="" type="checkbox"/> Auto-Client	
<input checked="" type="checkbox"/> OZ - OzVision	<input checked="" type="checkbox"/> Database Server	
<input checked="" type="checkbox"/> UP - uplink	<input checked="" type="checkbox"/> Standby Databa...	
	<input checked="" type="checkbox"/> Replication Dat...	
	<input checked="" type="checkbox"/> Monitor	
	<input checked="" type="checkbox"/> Broker Test	
	<input checked="" type="checkbox"/> Report Scheduler	
	<input checked="" type="checkbox"/> Watchdog	
	<input checked="" type="checkbox"/> Overdue Checker	

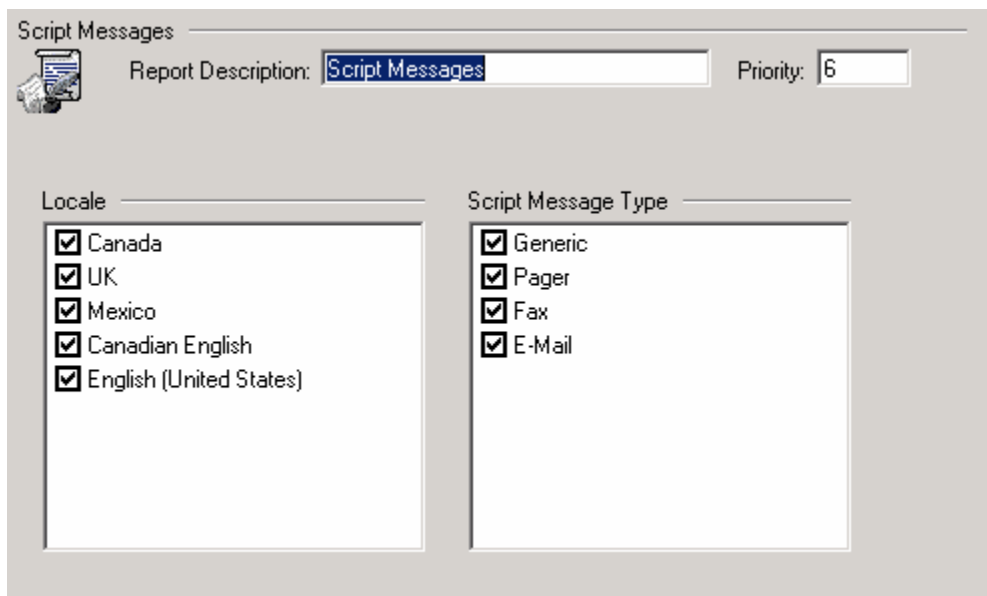
Reverse Channel Routes report form

Users may choose to filter the search results by **Receiver Line Prefix**, **Application Type**, or **Protocol**, as well as **Dealer ID**.

Once the search parameters have been met, click **Next** to continue running the report.

## 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 e-mail), and the text of the script message.



The image shows a Windows-style dialog box titled "Script Messages". At the top left is a small icon of a document with a printer. To its right is a "Report Description:" label followed by a text box containing "Script Messages". Further right is a "Priority:" label followed by a text box containing "6". Below these are two side-by-side list boxes. The left list box is titled "Locale" and contains five items, each with a checked checkbox: "Canada", "UK", "Mexico", "Canadian English", and "English (United States)". The right list box is titled "Script Message Type" and contains four items, each with a checked checkbox: "Generic", "Pager", "Fax", and "E-Mail".

Script Messages report form

Users may filter the search results by **Locale** and **Script Message Type**.

Once the search parameters have been met, click **Next** to continue running the report.

## 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.

Actions

Available Components:

- Monitoring Company
  - <Default>
- Dealer
  - <Default>
- Customer
  - <Default>

Description:

Behavior: ☐ User Requested ☐ Automatic on Next

Availability:

Signal Qualifiers		Workflow Flags	
Description	Status	Description	
Site On-Test	Any	Workflow Flag 1	
Site Test Expired	Any	Workflow Flag 2	
Related Site On Test	Any	Workflow Flag 3	
Related Site Test Expired	Any	Workflow Flag 4	
Storm Mode	Any	Workflow Flag 5	
Caller ID Mismatch	Any	Workflow Flag 6	
BLOB Data Available	Any	Workflow Flag 7	

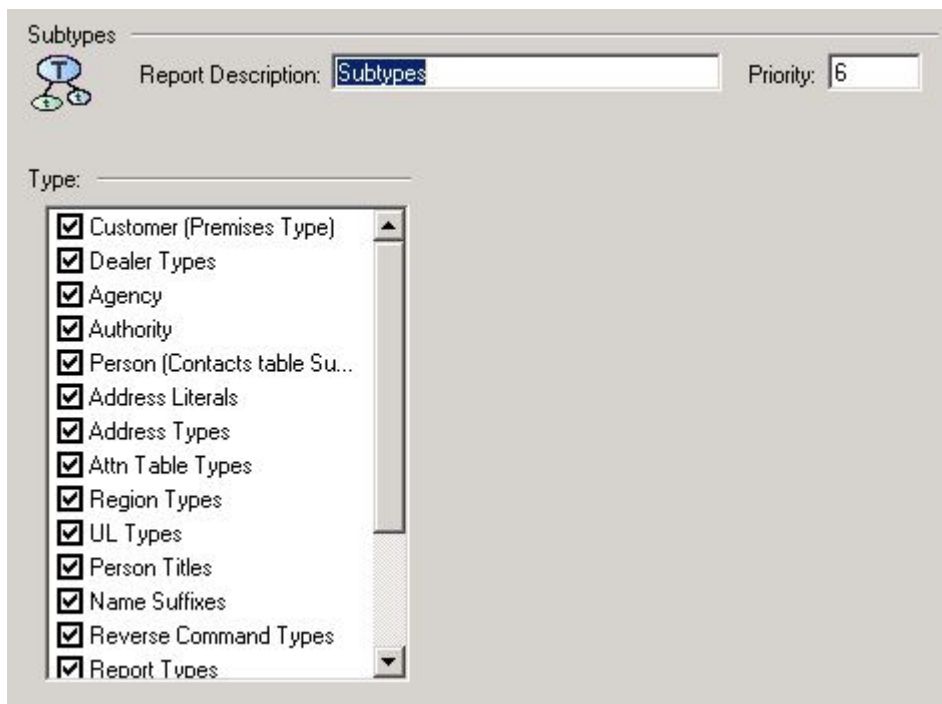
Service Provider Device Types report form

Users may limit the report to a specific **Protocol** type.

Once the search parameters have been met, click **Next** to continue running the report.

## 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.

The image shows a software window titled "Subtypes". At the top left is a small icon with a blue circle containing a white 'T' and two smaller green circles below it. To the right of the icon is a text field labeled "Report Description:" containing the word "Subtypes". Further right is a "Priority:" label followed by a text field containing the number "6". Below these fields is a "Type:" label followed by a list box. The list box contains 15 items, each with a checked checkbox: "Customer (Premises Type)", "Dealer Types", "Agency", "Authority", "Person (Contacts table Su...", "Address Literals", "Address Types", "Attn Table Types", "Region Types", "UL Types", "Person Titles", "Name Suffixes", "Reverse Command Types", and "Report Types". The list box has a vertical scrollbar on its right side.

Subtypes

Report Description: Subtypes

Priority: 6

Type:

- ☒ Customer (Premises Type)
- ☒ Dealer Types
- ☒ Agency
- ☒ Authority
- ☒ Person (Contacts table Su...
- ☒ Address Literals
- ☒ Address Types
- ☒ Attn Table Types
- ☒ Region Types
- ☒ UL Types
- ☒ Person Titles
- ☒ Name Suffixes
- ☒ Reverse Command Types
- ☒ Report Types

Subtypes Report form

Users may filter the report by **Types**.

Once the search parameters have been met, click **Next** to continue running the report.

## Temporary Comments

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 may want to utilize this report in order to see vital comments, such as a customer vacationing during a specific time period, or other special instructions regarding an account.

Temporary Comments

Report Description:  Priority:

From :  To :

Customer ID

Name

Dealer ID

Branch ID

Group

Class

☐ Follow up

☒ Include comment details

Date range:  Order by:  Contract type:

☐ Selected dates  
☒ Non-expired  
☐ Expired

☒ Valid To Date  
☐ Contact ID  
☐ Name

Monitoring status

☒ Pending  
☒ Inactive  
☒ Active

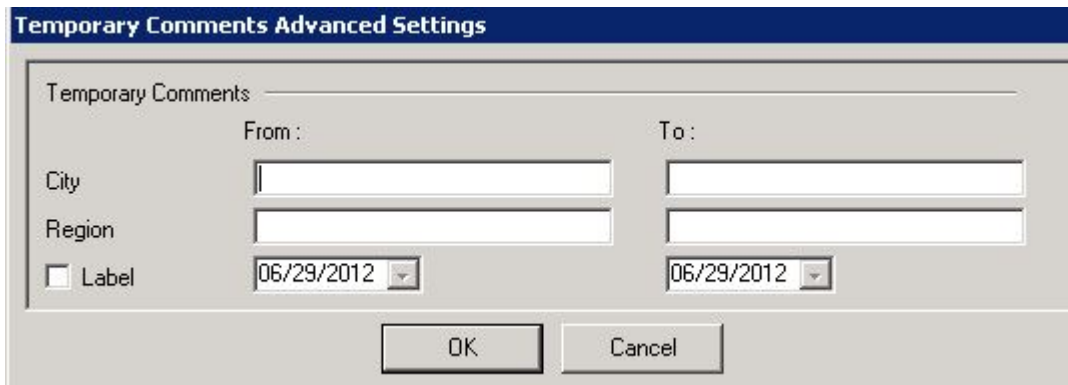
☐ Company  
☒ Customer  
☐ Dealer  
☐ Branch  
☐ Agency  
☐ Authority

Temporary Comments Report form

Users may enter a wide range of search criteria for a customer, such as **Customer**, **Dealer** or **Branch ID** as well as **Date range**. Typically, it is recommended to include the comment details in the report.

## Advanced Settings

In addition to the main form specifications, by clicking the **Advanced** button on the *Temporary Comments* screen, a user may also specify a **City**, **Region** and/or **Label** date range.

A dialog box titled "Temporary Comments Advanced Settings". It contains a "Temporary Comments" text field at the top. Below it are two columns of input fields. The left column has "City", "Region", and a "Label" checkbox. The right column has "From :", "To :", and two date pickers both set to "06/29/2012". At the bottom are "OK" and "Cancel" buttons.

Temporary Comments	
City	
Region	
<input type="checkbox"/> Label	
From :	To :
06/29/2012	06/29/2012

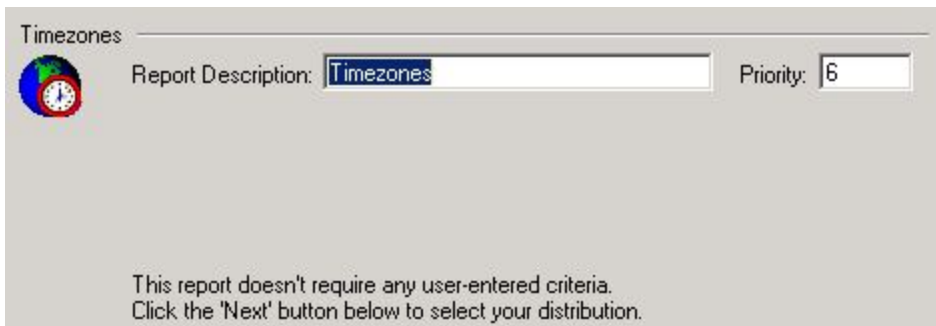
OK Cancel

Temporary Comments Advanced Settings

Once the search parameters are set, click the **Next** button to continue running the report.

## Time Zones

The *Time Zones* report provides a list of all Time Zones currently entered in the Manitou system.

A report form titled "Timezones". It features a clock icon on the left. The "Report Description:" field contains the text "Timezones". The "Priority:" field contains the number "6". At the bottom, there is a message: "This report doesn't require any user-entered criteria. Click the 'Next' button below to select your distribution."

Timezones

Report Description: Timezones Priority: 6

This report doesn't require any user-entered criteria.  
Click the 'Next' button below to select your distribution.

TimeZones Report form

This report requires no user-entered criteria.

Click **Next** to continue running the report.

## 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, condition picture as well as other area and zone details.

Transmitter Protocol Formats

Report Description: Transmitter Protocol Formats Priority: 6

From: To:

Protocol Type

Type:

- ☒ Event Type
- ☒ Channel Based
- ☒ Modem2 Hex to SIA
- ☒ Modem2 Hex to Radionics

Transmitter Protocol Formats report form

Users may filter the search by **Protocol** or by **Type**.

Once the search parameters are set, click the **Next** button to continue running the report.

## Transmitter Types

The *Transmitter Types* report provides a list of all Transmitter Types currently entered into the Manitou system. Users may 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.

Transmitter Types

Report Description: Transmitter Types Priority: 6

From: To:

Transmitter Type

Reverse Command Protocol:

- ☒ None
- ☒ APCO Alarm
- ☒ BT ADACS
- ☒ Director
- ☒ Emizon
- ☒ HID Access Control
- ☒ Honeywell WIN-P...
- ☒ Media Gateway

☐ Include programming

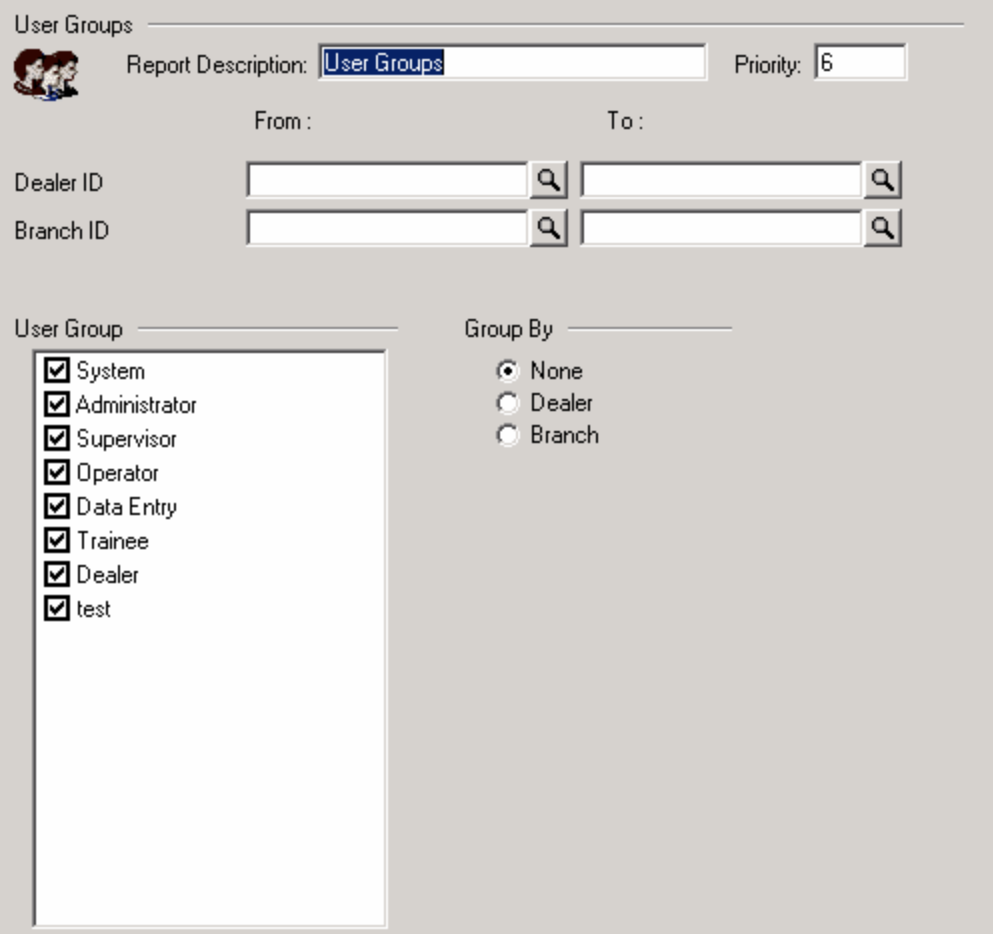
Transmitter Types Report form

Once the search parameters have been set, click **Next** to continue running the report.



## 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.



User Groups

Report Description:  Priority:

From :  To :

Dealer ID

Branch ID

User Group

- ☒ System
- ☒ Administrator
- ☒ Supervisor
- ☒ Operator
- ☒ Data Entry
- ☒ Trainee
- ☒ Dealer
- ☒ test

Group By

- ☒ None
- ☐ Dealer
- ☐ Branch

User Groups report forms

Users may filter the search criteria by **Dealer** or **Branch ID**, **User Group**, as well as specify grouping.

Once the search parameters have been met, click **Next** to continue running the report.

## 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.

Users

Report Description:  Priority:

From :  To :

Dealer ID

Branch ID

User Group

- ☐ System
- ☐ Administrator
- ☐ Supervisor
- ☐ Operator
- ☐ Data Entry
- ☐ Trainee
- ☐ Dealer
- ☐ Test

Locale

- ☐ Canada
- ☐ UK
- ☐ England
- ☐ Canadian English
- ☐ English (United States)

Group By

- ☒ User Group
- ☐ Locale
- ☐ Dealer
- ☐ Branch

Users report form

Users may filter the search results by **Dealer** or **Branch ID**, **User Group** or **Locale** as well as specify grouping.

Once the search parameters have been set, click **Next** to continue running the report.

## 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.

Window Codes

Report Description:  Priority:

From :  To :

Window Code

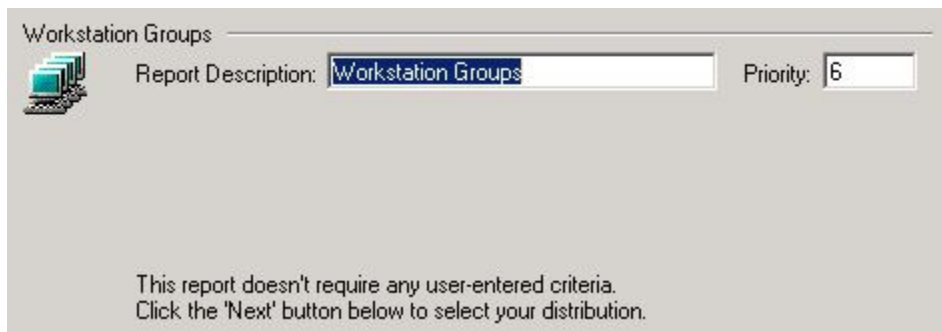
Window Codes report form

Users may choose to leave the search parameters blank to list all window codes in the system or specify a single code.

Once the search parameters have been set, click **Next** to continue running the report.

## Workstation Groups

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

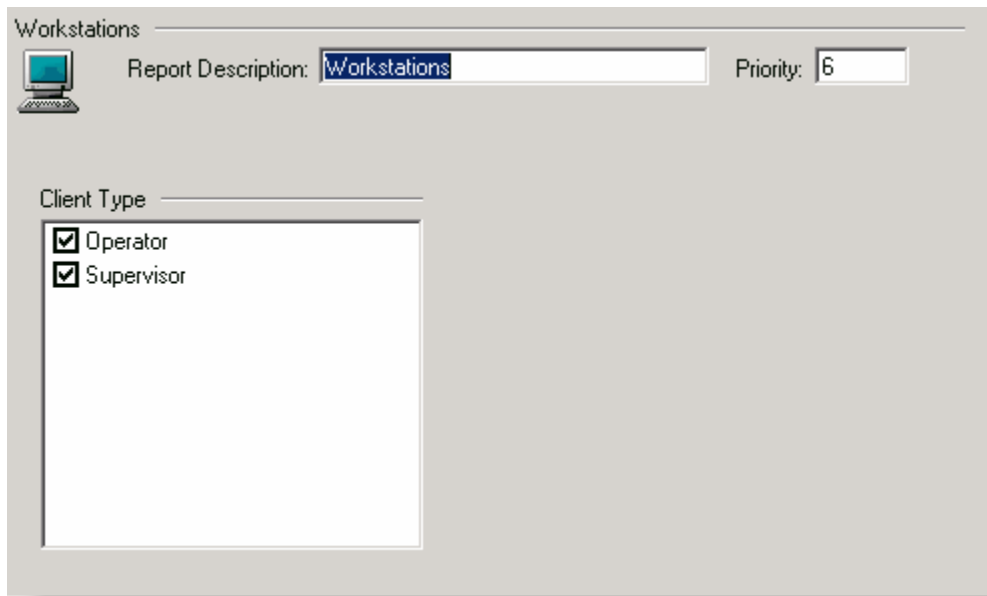


Workstation Groups Report form

Click **Next** to continue running the report.

## 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 Manitou client, the description, security level, when the workstation was last active, monitoring group, attributes, locale and time zone.



Workstations report form

Users may filter the report by **Client Type** - either **Operator** or **Supervisor** Workstation.

Once the search parameters have been set, click **Next** to continue running the report.

## System Reports

You must define parameters before running Manitou Reports. Because every Manitou Report is different, please refer to the specific Report document for instructions on running the Report you want.

After you have set your Manitou Report parameters, you must define your Distribution list to indicate the format in which Manitou should send your Report, and the recipients to whom it should be sent. The instructions in this document apply to the following Report types:

- Activity Reports
- Custom Reports
- Maintenance Reports
- Master File Reports
- System Reports

Because the instructions for Distributing your Report are the same for all these Report types, Report Distribution instructions are contained in this document only. Refer to the instructions for your specific Report, and then refer to this document for Distribution instructions.

## Adding Recipients to your Report Distribution List

Perform the following steps to define your Report Distribution List:

1. After you have entered all your Report parameters on the Reports Tab, click "**Next**" in the bottom-right corner of the Report form.

**Result:** "Distribution" Tab displays as shown in the following screenshot:

The screenshot shows the 'Distribution' tab of a report configuration window. At the top, there is a section for 'Override or unlisted destination:' with fields for 'Override recipient's name:', 'Override destination type:', and 'Override destination address (Fax/Email):', followed by an 'Add to list' button. Below this is the 'Contact list destination:' section, which includes a 'Default printer:' dropdown set to 'PRINTSERVER01', a 'Contact list type:' dropdown set to 'Customer', and a 'Customer:' text field with '259' and a search icon. There are also checkboxes for 'Show suppressed contacts' and 'Hold for preview'. The main area is a list of contacts, each with a small icon and a plus sign to its left. The contacts are grouped under a 'Contacts' header and include: Anytime Bill, Mary Beth, Pete - Non Opening user, Same Spade, John Doe, Jg, Jeff Herd, Non Rotating user 1, Non Rotating user #2, Jane Doe, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, Dealer, Dealer GH 202 for testing, Branch, Agency, Authority, Customer, George's testing account, and Company (printer only). To the right of the contact list are four navigation buttons: '>', '<', '>>', and '<<'. At the bottom of the window, there are two tabs: 'Reports' and 'Distribution', with 'Distribution' being the active tab.

2. If you want Manitou to distribute your Report to a specific person, enter the recipient's name in the "Override recipient's name:" field.
3. Select a format in which to distribute your Report from the "Override destination type:" dropdown menu.

**Note:** your options from the "Override destination type:" menu are "Fax", "E-mail", and "Printer".

**Result:** if you selected email, a dropdown menu called "Email attachment type:" displays. Select "PDF", "RTF" or "Text" as the attachment type. If you selected the fax option, the field to enter the fax number now displays as formatted when you click in the "Override fax number:" field. Enter the recipient's fax number (including the area code).

4. Enter either a fax number or an email address for your Report recipient in the "Override destination address (Fax/Email):" field.
5. Click "**Add to list**".

**Result:** the Report recipient you added now displays in the right window area as shown in the following screenshot:

The screenshot displays the 'Distribution' tab of a software application. The interface is divided into several sections:

- Override or unlisted destination:** This section includes fields for 'Override recipient's name' (Doug Mock), 'Override destination type' (E-Mail), 'Override email address' (doug@boldgroup.com), and 'Email attachment type' (PDF). An 'Add to list' button is located to the right of the attachment type dropdown.
- Contact list destination:** This section includes a 'Default printer' dropdown (PRINTSERVER01), a 'Contact list type' dropdown (Branch), and a 'Branch' search field with a magnifying glass icon.
- Show suppressed contacts:** A checkbox labeled 'Show suppressed contacts' is present.
- Hold for preview:** A checkbox labeled 'Hold for preview' is present.
- Contacts list:** A list of contact types is shown on the left: Contacts, Dealer, Branch, Agency, Authority, Customer, and Company (printer only). Each item has a small icon next to it.
- Navigation buttons:** A set of five buttons (right arrow, left arrow, double right arrow, double left arrow, and a central button) is located between the contacts list and the preview area.
- Preview area:** A large white area on the right side of the interface, currently empty.
- Bottom tabs:** At the bottom, there are two tabs: 'Reports' and 'Distribution', with 'Distribution' being the active tab.

6. If you want to select an entity as a recipient for your Report, you must define the parameters in the "Contact list destination:" area of the Distribution Tab.
7. If you want to define a destination printer, select it from the "Default printer:" dropdown menu.

8. Select an entity from the "Contact list type:" dropdown menu.

**Note:** your options from the "Contact list type:" dropdown menu are "Company", "Customer", "Dealer", "Branch", "Agency", and "Authority".

**Result:** the Contact List Type you selected now displays in the bottom-most field.

9. Click the lookup icon to the right of the bottom-most field.

**Result:** the "Find" window displays for the entity you selected as shown in the following screenshot:

**Find Customer**

Search Criteria

Search Key 1:	City	Value:	
Search Key 2:		Value:	
Search Key 3:		Value:	
Search Key 4:		Value:	
Search Key 5:		Value:	

Search Results

Customer ID	Full Name	Address	Contact Point
-------------	-----------	---------	---------------

Max Rows per Query: 2000

Search Load Clear Cancel

10. Enter search parameters to find the entity you want to add as a recipient for your Report, and click "**Search**".

**Result:** your search results display as shown in the following screenshot:



**Find Customer**

Search Criteria

Search Key 1: City Value: colorado springs

Search Key 2: Value:

Search Key 3: Value:

Search Key 4: Value:

Search Key 5: Value:

Search Results

Customer ID	Full Name	Monitoring Status	Type	Contact Point	Address
SYS-REC1	Default Receiver testing	Active	Commercial		
259	George's testing account	Active	Residential	(719) 555-1212	1234 M
SYS-REC2	Default Receiver Account	Active	Commercial		421 Wi
XML0001	Matthew Narowski	Active	Residential	(719) 314-5204	3070 H
AMYTEST	Keith Godsey	Active	Video	(719) 593-2194	6213 T
261	Sub-account #1 for 259	Active	Commercial	(360) 985-6235	3455 M
262	Sub Account #2 of 259	Active	Commercial		421 Wi
JOSEG001	Jose Alberto Garduno	Active	Prueba G4S	(719) 572-1582	3070 H
SYS-DLR0001	Dealer 1 System Account	Active	Commercial	*****	425 WI
99000908	Dynamark High Speed	Active	Commercial		3999 H
AMYTEST1	Amy Test	Active	Residential	(989) 798-7537	6213 T
9852147	MacDonald, Nial	Active	Video	(719) 331-5789	421 Wi
7412589	Interface Test	Active	Commercial		123 An
XML0002	Matthew Narowski	Active	Residential		*****

Max Rows per Query: 2000

Search Load Clear Cancel

11. Select the entity associated with your recipient, and click "**Load**".

**Result:** the "Find" window closes, and the system returns you to the "Distribution" Tab. The entity you selected now displays in the bottom-most field and in the left window as shown in the following screenshot:

Override or unlisted destination:

Override recipient's name:

Override destination type:

Override email address:

Email attachment type:

Contact list destination:

Default printer:

Contact list type:

Customer:

☐ Show suppressed contacts ☐ Hold for preview

- Contacts
  - Amy Test
    - Printer
  - Dealer
  - Branch
  - Agency
  - Authority
  - Customer
    - Amy Test
      - Printer
    - Company (printer only)

Doug Mock - E-Mail (dougmb@boldgroup.com) (PDF)

Reports Distribution

12. To add the entity to your recipient list, select it, and click the right-facing single arrow.

**Result:** the entity you added now displays in the right window recipient list as shown in the following screenshot:

Override or unlisted destination:

Override recipient's name: Doug Mock

Override destination type: E-Mail

Override email address: dougm@boldgroup.com

Email attachment type: PDF

Contact list destination:

Default printer: PRINTSERVER01

Contact list type: Customer

Customer: AMYTEST1

☐ Show suppressed contacts ☐ Hold for preview

Contacts

- Amy Test
  - Printer
- Dealer
- Branch
- Agency
- Authority
- Customer
  - Amy Test
    - Printer
  - Company (printer only)

Doug Mock - E-Mail (doug@boldgroup.com) (PDF)

Amy Test - Printer (PRINTSERVER01)

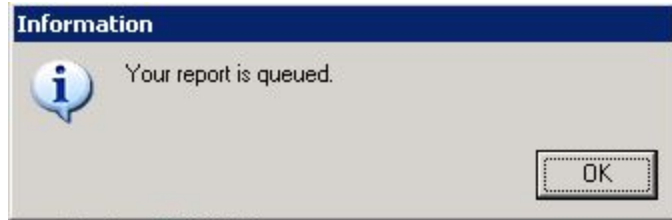
Reports Distribution

13. If you want, select the "Show suppressed contacts" checkbox.

14. If you want to preview your Report prior to distribution, select the "Hold for preview" checkbox.

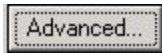
15. When you have finished adding Report recipients, click "**Finish**" in the bottom-right corner of the form.

**Result:** the "Information" window displays as shown in the following screenshot:



### Accessing the Advanced Window

Some Report forms include an "Advanced" button as shown in the following screenshot:



Clicking the "Advanced" button results in the display of an Advanced Settings window similar to the Alarm Cause Summary Advanced Settings window displayed in the following screenshot:

 A screenshot of a software window titled "Alarm Cause Summary Advanced Settings". The window has a blue header bar. Below the header, there is a section titled "Alarm Cause Summary". This section contains two columns of input fields. The left column is labeled "From :" and the right column is labeled "To :". The input fields are arranged in pairs, with labels on the left and input boxes on the right. The labels are: City, Region, Label 1, CheckBox 1, CheckBox 2, CheckBox 3, Label 2, Label 3, Installation Date (with a checkbox), CheckBox, CheckBox, and Label. The input boxes for "From :" and "To :" are empty. The "Installation Date" field shows "01/20/2014" with a dropdown arrow. At the bottom of the window, there are two buttons: "OK" and "Cancel".

These Advanced Settings windows correspond to the "Customer user defined fields" form in the Tools menu, under Options, and Account Creation/Maintenance.

Customer user defined fields

Available Fields

Label + Textbox    Checkbox    Field Properties

Selected Fields

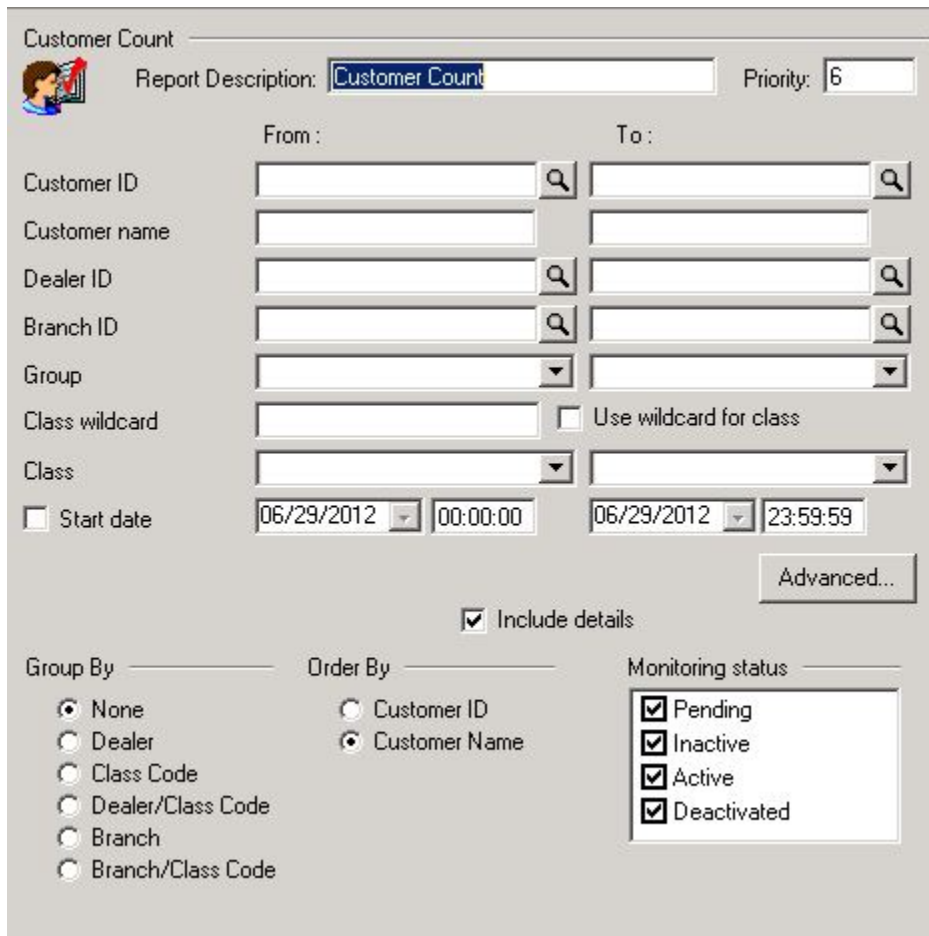
Label 1	Label 1
	<input type="checkbox"/> CheckBox 1
	<input type="checkbox"/> CheckBox 2
	<input type="checkbox"/> CheckBox 3
Label 2	Label 2
Label 3	Label 3
	<input type="checkbox"/> CheckBox
Label	Label
	<input type="checkbox"/> CheckBox
Installation Date	Installation Date


☒ Show Grid    Clear Layout    Reload

System Administrators can use the "Customer user defined fields" form to customize the display and functionality for the Advanced Settings window.



## Customer Count

The *Customer Count* report lists customer status for all customers in the system. It can be grouped by **Dealer**, **Branch** or **Class Code** and includes summaries. Users may choose to order the report by **Customer ID** or **Customer Name**.







Customer Count  Report Description:  Priority:

From :  To :

Customer ID    

Customer name

Dealer ID    

Branch ID    

Group

Class wildcard  ☐ Use wildcard for class

Class

☐ Start date

☒ Include details

Group By  Order By  Monitoring status

☒ None  
☐ Dealer  
☐ Class Code  
☐ Dealer/Class Code  
☐ Branch  
☐ Branch/Class Code

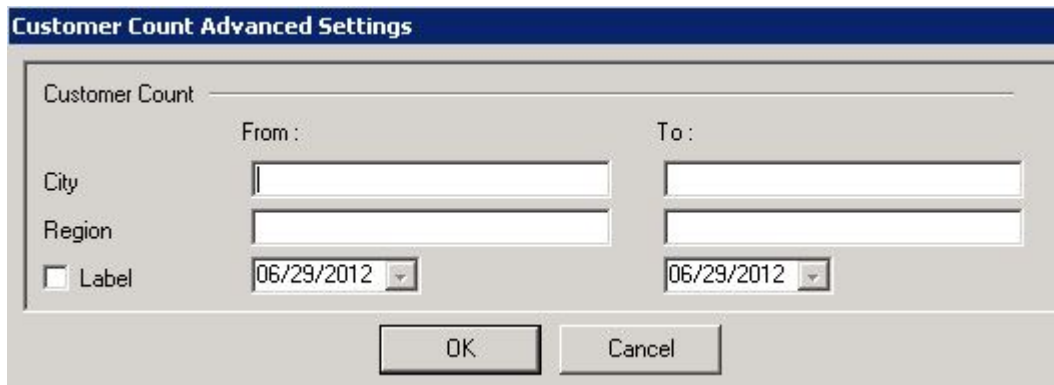
☐ Customer ID  
☒ Customer Name

☒ Pending  
☒ Inactive  
☒ Active  
☒ Deactivated

Customer Count Report form

## Advanced Settings

*Advanced Settings* allow the user to also specify **City**, **Region** and **Label** date range.



Customer Count

From :  To :

City

Region

☐ Label

Customer Count Advanced Settings

Once the search parameters are set, click **Next** to continue running the report.

## 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 only include services that are chargeable.

Customer Services

Report Description:  Priority:

From : To :

Customer ID

Customer name

Dealer ID

Branch ID

Group

Class

☐ Date

☐ Include chargeable services only

☒ Include customer details

Group by  Order by  Summary totals:

☒ Customer ☐ Dealer ☐ Branch

☒ Customer ID ☐ Customer Name

☐ None ☐ By service ☐ By charge code ☒ Both

Customer Services Report form

## Search Options

The **Search Options** for the *Customer Services* report allow the user to select **Monitoring Status**.



**Customer Services Options**

Customer Services \_\_\_\_\_

Monitoring status \_\_\_\_\_

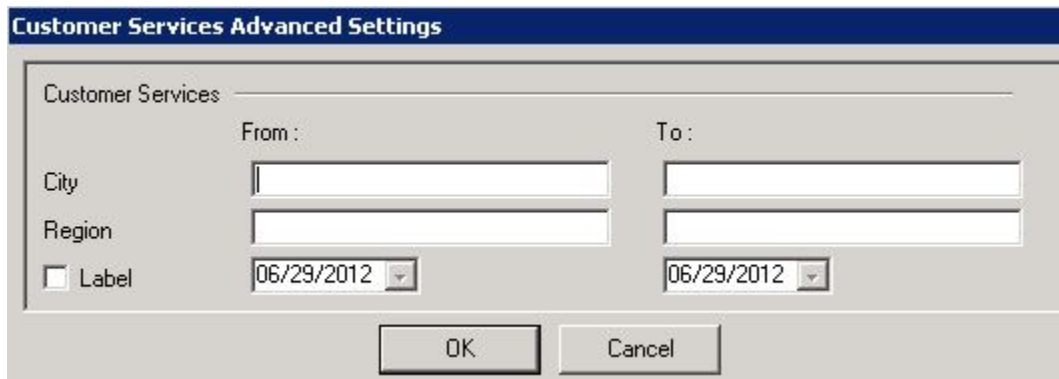
- ☒ Pending
- ☒ Inactive
- ☒ Active
- ☒ Deactivated

OK Cancel

Customer Services Report Options

## Advanced Settings

*Customer Services Advanced Settings* enables the user to specify **City**, **Region** and **Label** date range.



**Customer Services Advanced Settings**

Customer Services \_\_\_\_\_

From : \_\_\_\_\_ To : \_\_\_\_\_

City \_\_\_\_\_

Region \_\_\_\_\_

☐ Label 06/29/2012 06/29/2012

OK Cancel

Customer Services Advanced Settings

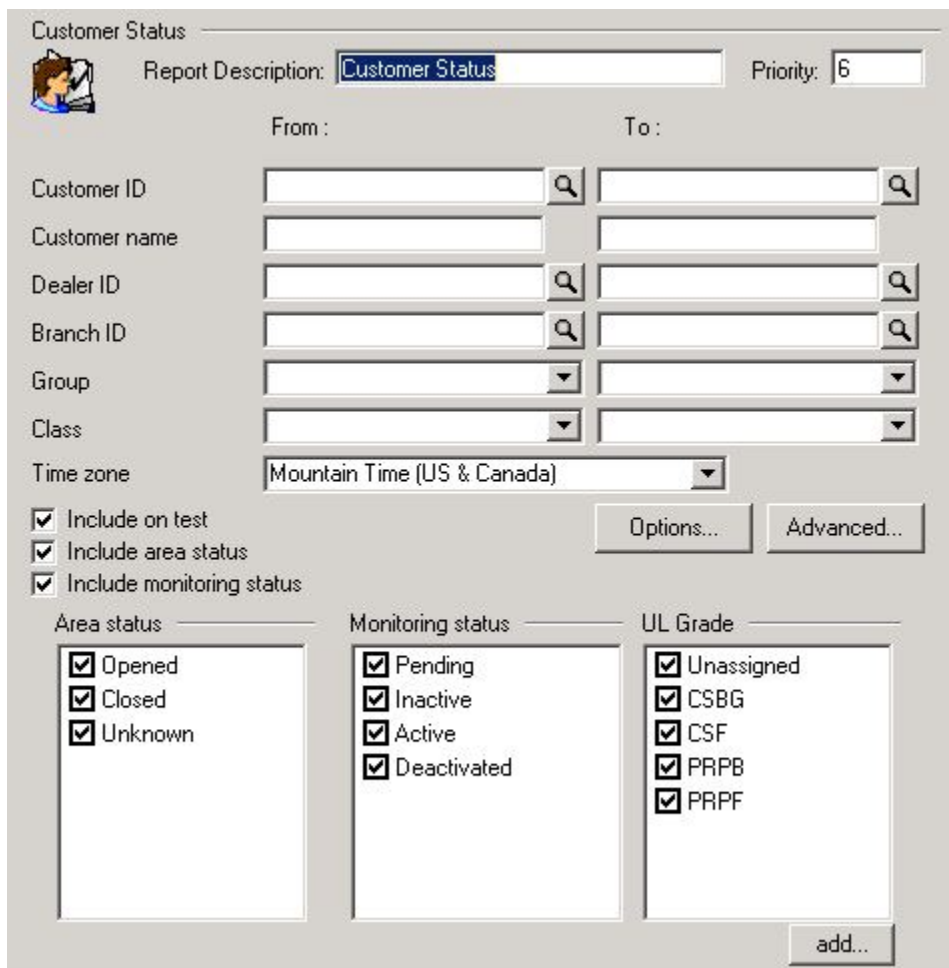
Once the search parameters are set, click **Next** to continue running the report.

## Customer Status

The *Customer Status* report is a “bare bones” report which displays only the current status of the customer or customers for which the report is run. Users can run this report to also find the Out-of-Service status of customers. To get a proper [On Test](#) report, leave all options blank with the exception of the **Customer Status** section.

*The Customer Status report provides three different outputs depending on what options have been selected by the Operator.*





Customer Status

Report Description:  Priority:

From :  To :

Customer ID

Customer name

Dealer ID

Branch ID

Group

Class

Time zone

☒ Include on test

☒ Include area status

☒ Include monitoring status

Area status

- ☒ Opened
- ☒ Closed
- ☒ Unknown

Monitoring status

- ☒ Pending
- ☒ Inactive
- ☒ Active
- ☒ Deactivated

UL Grade

- ☒ Unassigned
- ☒ CSBG
- ☒ CSF
- ☒ PRPB
- ☒ PRPF

Customer Status report form

## Search Options

*Customer Status Options* allow the user to specify grouping and ordering for the report.



**Customer Status Options**

Customer Status

Group by  Order by

☒ Customer ☒ Customer ID

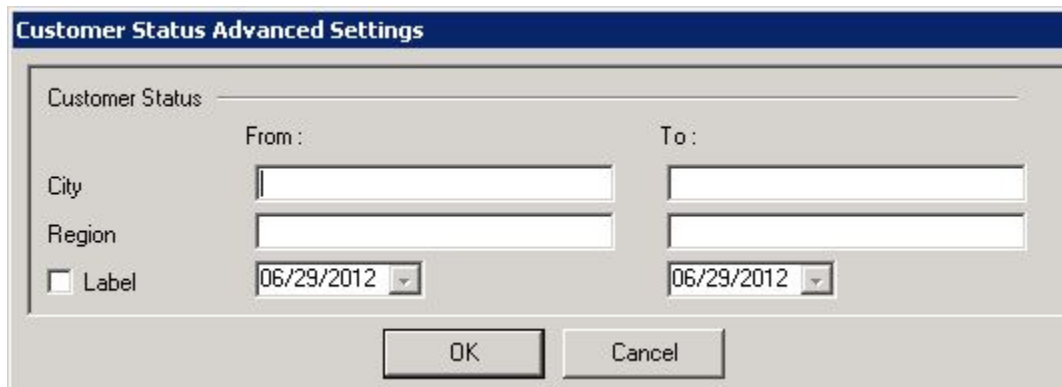
☐ Dealer ☐ Customer Name

☐ Branch

Customer Status Report Options

## Advanced Settings

The **Advanced Settings** option enables the specification of **City**, **Region**, and **Label** date range.

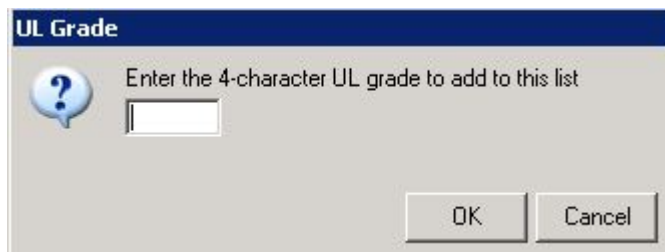


The dialog box is titled "Customer Status Advanced Settings". It contains a "Customer Status" label at the top. Below it, there are two columns of input fields. The left column has "City" and "Region" labels, each followed by a text input field. The right column has "From:" and "To:" labels, each followed by a date input field. Below these, there is a checkbox labeled "Label" and two date input fields, both showing "06/29/2012". At the bottom, there are "OK" and "Cancel" buttons.

Customer Status Advanced Settings

## UL Grades

In addition to a comprehensive list, the **Add** button the *Customer Status* report form allows a user to add additional 4-character UL Grade codes.



The dialog box is titled "UL Grade". It features a question mark icon on the left. To the right of the icon, the text reads "Enter the 4-character UL grade to add to this list". Below this text is a single-line text input field. At the bottom, there are "OK" and "Cancel" buttons.

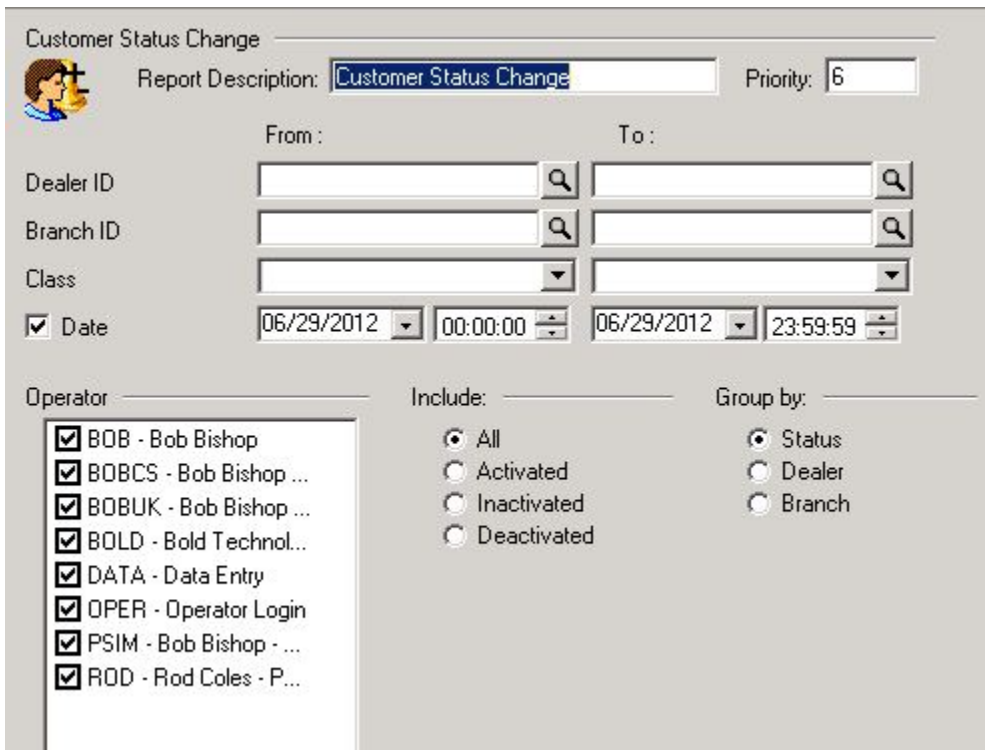
Customer Status Add UL Grade

Once the search parameters are set, click **Next** to continue running the report.

## Customer Status Change

The *Customer Status Change* report lists all status changes in a specified date range. Data can be searched by **Dealer**, **Branch**, or **Class**. The **Class** search parameters are defined by Weekly Activity, Monthly Open Close activity, or Regular Account activity.

The details in this report lists all signal/alarm details, open and close activity and any exception activity (unexpected openings/closings, for example.)



The screenshot shows the 'Customer Status Change' report form. At the top, there is a title bar with a user icon and the text 'Customer Status Change'. Below this, the 'Report Description' field contains 'Customer Status Change' and the 'Priority' is set to '6'. The form includes search criteria for 'From' and 'To' dates, 'Dealer ID', 'Branch ID', and 'Class'. The 'Date' checkbox is checked, and the date range is set to '06/29/2012' from '00:00:00' to '23:59:59'. Under the 'Operator' section, a list of operators is shown with checkboxes: BOB - Bob Bishop, BOBCS - Bob Bishop ..., BOBUK - Bob Bishop ..., BOLD - Bold Technol..., DATA - Data Entry, OPER - Operator Login, PSIM - Bob Bishop - ..., and ROD - Rod Coles - P... All are checked. The 'Include' section has radio buttons for 'All', 'Activated', 'Inactivated', and 'Deactivated', with 'All' selected. The 'Group by' section has radio buttons for 'Status', 'Dealer', and 'Branch', with 'Status' selected.

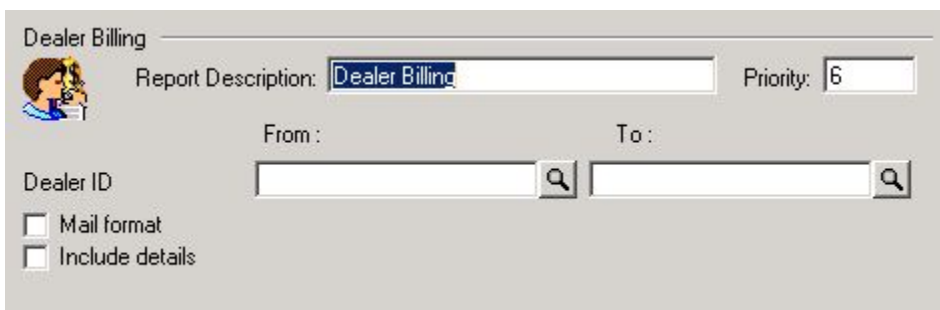
Customer Status Change Report

Users can limit the search to a particular **Operator**, as well as **Activated**, **Inactivated** or **Deactivated** customers in the system.

Once the search parameters are set, click **Next** to continue running the report.

## Dealer Billing

The *Dealer Billing* report calculates a Dealer's billing invoice based on his or her specific Dealer charges housed within the record. This report can only be specified by **Dealer ID** and can include either mail format or specific details.



The screenshot shows the 'Dealer Billing' report form. At the top, there is a title bar with a user icon and the text 'Dealer Billing'. Below this, the 'Report Description' field contains 'Dealer Billing' and the 'Priority' is set to '6'. The form includes search criteria for 'From' and 'To' dates, and a 'Dealer ID' field. There are two checkboxes: 'Mail format' and 'Include details', both of which are unchecked.

Dealer Billing Report form

Once the search parameters are set, click **Next** to continue running the report.

## 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**, **Branch** or **Authority ID** and can be grouped by either **Dealer** or **Branch**, if preferred.

False Alarm Summary

Report Description: False Alarm Summary Priority: 6

From : 06/23/2012 00:00:00 To : 06/29/2012 23:59:59

☒ Date

Dealer ID

Branch ID

Authority ID

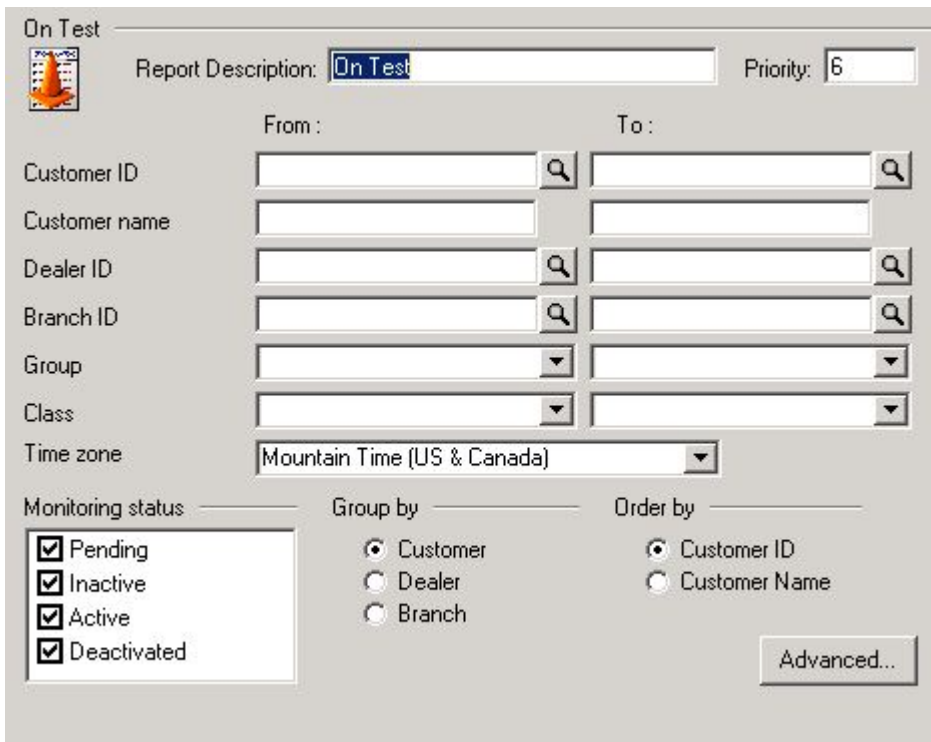
Group By: ☐ None ☐ Dealer ☐ Branch

False Alarm Summary Report form

Once the search parameters are set, click **Next** to continue running the report.

## On Test

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



On Test

Report Description:  Priority:

From :  To :

Customer ID

Customer name

Dealer ID

Branch ID

Group

Class

Time zone

Monitoring status

- ☒ Pending
- ☒ Inactive
- ☒ Active
- ☒ Deactivated

Group by

- ☒ Customer
- ☐ Dealer
- ☐ Branch

Order by

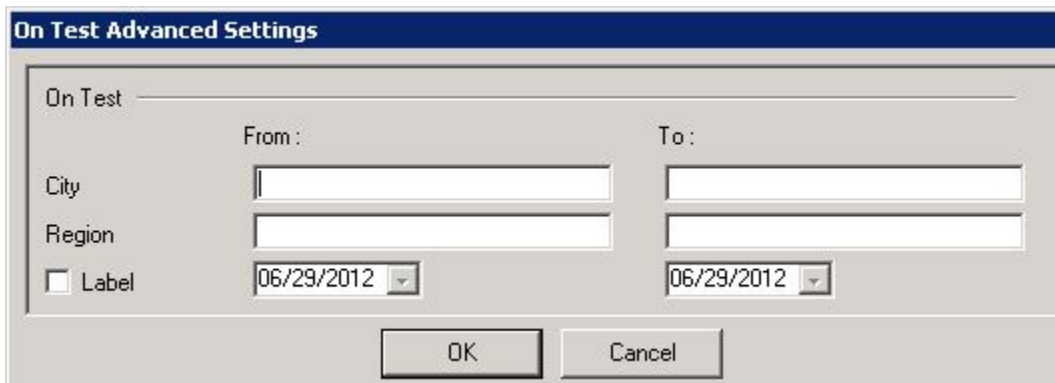
- ☒ Customer ID
- ☐ Customer Name

Advanced...

On Test Report form

## Advanced Settings

The *Advanced Settings* provide additional parameters of **City**, **Region** and **Label**.



On Test Advanced Settings

On Test

From :  To :

City

Region

☐ Label

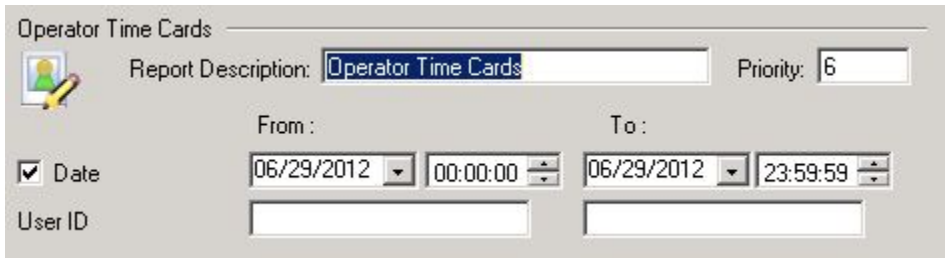
OK Cancel

On Test Report Advanced Settings

Once the search parameters are set, click **Next** to continue running the report.

## Operator Time Cards

The *Operator Time Cards* report lists the times an Operator logs in and out of the Operator Workstation. Search parameters are limited to searching by **User ID**, **Date** and **Time**.



Operator Time Cards

Report Description:  Priority:

From :   To :

☒ Date

User ID

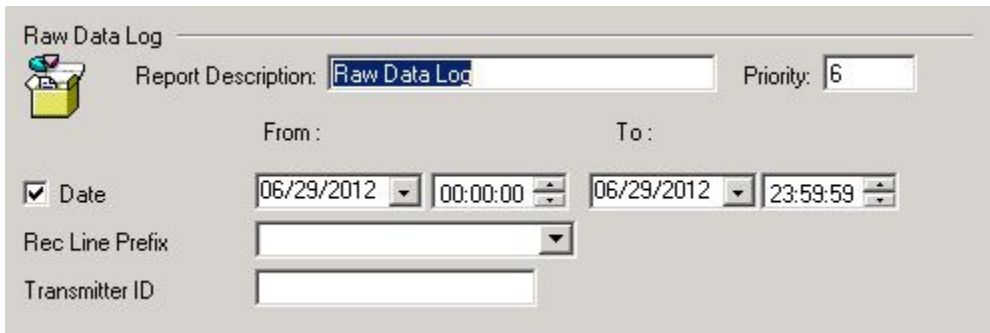
Operator Time Cards Report form

Once the search parameters are set, click **Next** to continue running the report.

## 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. Users must specify a **Receiver Line Prefix** and/or a **Transmitter ID**.

*If no search parameters are specified, the report will not list any details.*



Raw Data Log

Report Description:  Priority:

From :   To :

☒ Date

Rec Line Prefix

Transmitter ID

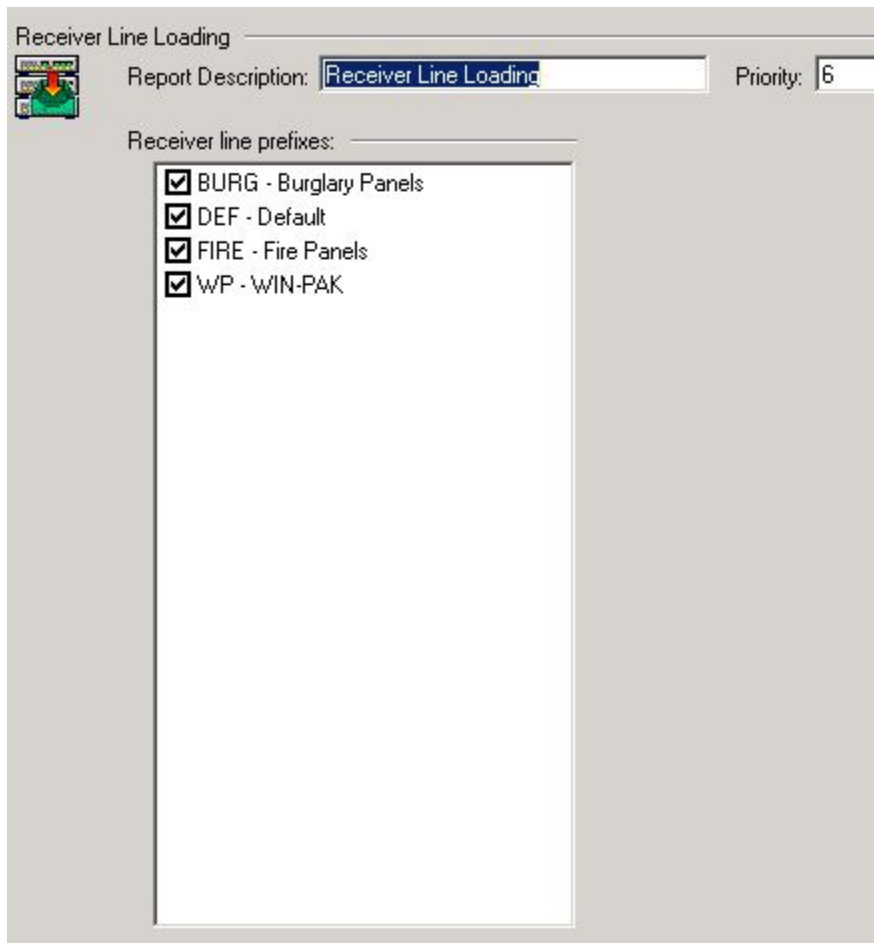
Raw Data Log Report form

Once the search parameters are set, click **Next** to continue running the report.

## 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. For more information, see [UL Requirements](#).



The image shows a software window titled "Receiver Line Loading". It contains a "Report Description" field with the text "Receiver Line Loading" and a "Priority" field with the value "6". Below these fields is a section labeled "Receiver line prefixes:" which contains a list of four items, each with a checked checkbox: "BURG - Burglary Panels", "DEF - Default", "FIRE - Fire Panels", and "WP - WIN-PAK".

Receiver Line Loading Report form

Once the search parameters are set, click **Next** to continue running the report.

## System Connection Status

The *System Connection Status* report lists the system status of customers under certain Dealers, Branches, Authorities, Groups or Classes. The report may also be run on just one customer without any additional search parameters.

System Connection Status

Report Description:  Priority:

From :  To :

Customer ID

Customer name

Dealer ID

Branch ID

Authority ID

Group

Class

☐ Enable date

☐ Terminate date

Include: ☒ Enabled ☐ Terminated

Group by: ☒ None ☐ Dealer ☐ Branch

Order by: ☒ Customer ID ☐ Customer name ☐ Date

System Connection Status

Users may choose to include either enabled or terminated systems, and may order the report by Customer ID or date.

## Advanced Settings

*Advanced Settings* allow the user to also specify **City**, **Region** and **Label** if preferred to generate the report.

System Connection Status Advanced Settings

System Connection Status

From :  To :

City

Region

☐ Label

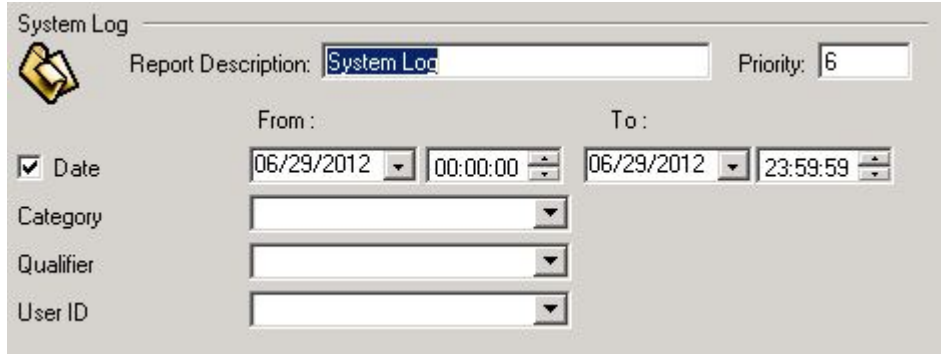
System Connection Status Advanced Settings

Once the search parameters are set, click **Next** to continue running the report.



## System Log

The *System Log* report provides a detailed list of all log-ins and log-offs to the system, the category where a user made adjustments, qualifiers, event text.



The screenshot shows the 'System Log' report form. It includes a 'Report Description' field with 'System Log' entered, a 'Priority' field with '6' entered, and a 'Date' checkbox which is checked. Below these are 'From' and 'To' date and time pickers, both set to '06/29/2012' and '00:00:00' to '23:59:59'. There are also dropdown menus for 'Category', 'Qualifier', and 'User ID'.

System Log Report form

Users may filter the search criteria by **Category**, **Qualifier** or **User ID**, as well as a specific date and time range.

Once the search parameters are set, click **Next** to continue running the report.

## Transmitter Count by Receiver

The *Transmitter Count by Receiver* report provides a list of all Receiver Types or Receiver Line prefixes based on FEPs or Receivers. The report includes details of FEP number, Receiver number, Receiver Type, Description, among other details.

Transmitter Count by Receiver

Report Description:  Priority:

From :  To :

FEP

Receiver

Receiver Types

- ☐ Ademco 685
- ☐ Adpro Fast Scan III
- ☐ AES 7701 in Admeco...
- ☐ AES 7701 in Radioni...
- ☐ BASE10
- ☐ Bold IP Receiver
- ☐ BoldXML
- ☐ BT Di...

Rec Line Prefix

- ☐ 00 - default
- ☐ 01 - Dealer Accounts
- ☐ 02 - sfadfdssfd01
- ☐ 03 - New Prefix01
- ☐ 04 - RLD 04
- ☐ 06 - RLD - 06
- ☐ 07 - RLD 07
- ☐ 08 - RLD 08

Summary

☒ None

☐ By Line

☐ By Receiver Line Prefix

Transmitter Count by Receiver report form

Users may limit the search results to display only certain **Receiver Types** or **Receiver Line Prefixes**, as well as **FEP** numbers or **Receiver** numbers.

Once the search parameters are set, click **Next** to continue running the report.

## Transmitter Count by Tx Type

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

Transmitter Count by Tx Type

Report Description:  Priority:

From :   To :

Customer ID

Customer name

Dealer ID

Branch ID

Group

Class

Transmitter type

- ☒ 4 + 2
- ☒ CheckVideo
- ☒ Combo Panel
- ☒ Default
- ☒ Gentek
- ☒ WIN-PAK NetAXS
- ☒ Residential Fire
- ☒ Sentinel

Group by

- ☒ None
- ☐ Dealer
- ☐ Branch

Transmitter Count by TX Type Report form

## Search Options

Clicking the **Options** button on the lower right of the report form, allows the Operator to select **Monitoring Status** as well as **Include Customer Details**, if preferred.

**Customer Status Options**

Customer Status

☐ Include Customer Details

Monitoring status

- ☒ Pending
- ☒ Inactive
- ☒ Active
- ☒ Deactivated

Transmitter County by Tx Type Options

## Advanced Settings

*Advanced Settings* allow the user to also specify **City**, **Region** and **Label** if preferred to generate the report.

Transmitter Count by Tx Type Advanced Settings

Transmitter Count by Tx Type

City

Region

☐ Label

From :

To :

06/29/2012

06/29/2012

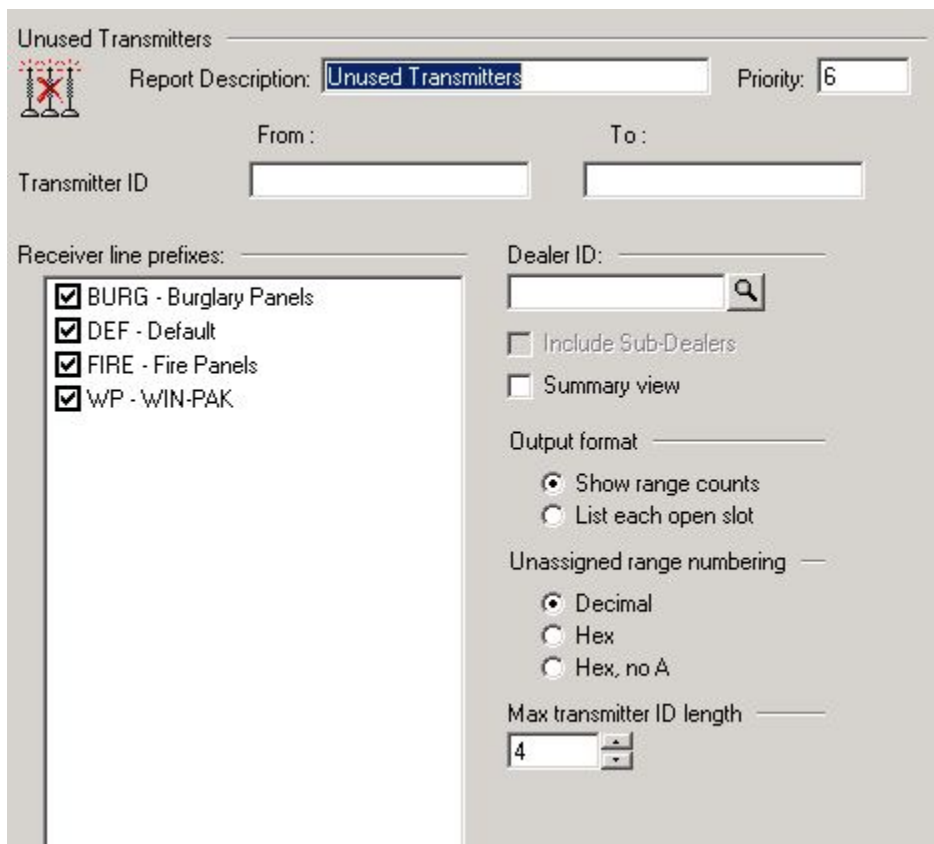
OK Cancel

Transmitter Count by Transmitter Type Advance Settings

Once the search parameters are set, click **Next** to continue running the report.

## Unused Transmitters

*Unused Transmitters* are transmitter numbers within a transmitter range, set up within the Dealer and Monitoring Company records, that are not yet assigned to a Transmitter on a Customer record.



The image shows a software form titled "Unused Transmitters". At the top left is an icon of two crossed tools. The form contains several input fields and checkboxes. The "Report Description" field is pre-filled with "Unused Transmitters". The "Priority" field contains the number "6". Below these are "From:" and "To:" labels above two empty text boxes. The "Transmitter ID" label is above another empty text box. On the left, under "Receiver line prefixes:", there is a list of four items, each with a checked checkbox: "BURG - Burglary Panels", "DEF - Default", "FIRE - Fire Panels", and "WP - WIN-PAK". On the right, the "Dealer ID:" label is above a text box with a search icon. Below this are two unchecked checkboxes: "Include Sub-Dealers" and "Summary view". The "Output format" section has two radio buttons: "Show range counts" (selected) and "List each open slot". The "Unassigned range numbering" section has three radio buttons: "Decimal" (selected), "Hex", and "Hex, no A". At the bottom right, the "Max transmitter ID length" label is above a spinner box showing the value "4".

Unused Transmitters Report form

Users may set the parameters by **Receiver line prefixes**, **Transmitter ID**, **Dealer ID** as well as **Output format**.

Once the search parameters are set, click **Next** to continue running the report.

## User Statistics

The *User Statistics* report provides the details of each Operator's user session including the log in and log out 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 Supervisor Workstation.

User Statistics

Report Description:  Priority:

From :   To :

☒ Date

Operator Id

- ☒ B0B - Bob Bishop
- ☒ B0BCS - Bob Bishop - CS
- ☒ B0BUK - Bob Bishop UK
- ☒ BOLD - Bold Technologies
- ☒ DATA - Data Entry
- ☒ OPER - Operator Login
- ☒ PSIM - Bob Bishop - PSIM
- ☒ ROD - Rod Coles - PSIM

Order by

- ☒ Date
- ☐ Operator

Summary type

- ☐ None
- ☒ Detail Summary
- ☐ Final Summary Only

☒ Include Session Details

User Statistics Report form

Users can specify **Operator ID**, **Order** and **Summary type** as well as whether or not to **Include session Details**.

Once the search parameters are set, click **Next** to continue running the report.

## Report Queue


The *Report Queue* allows a user to view the current Manitou report queue or to search the queue by specific criteria (for example: date / time range or by system user name). Once a report is run, it is sent to the *Report Queue* to be viewed.

Report Queue								
	Description	User ID	Status	Submitted	Started	Finished	Priority	Error Message
▶	Customer Activity for customer	BOLD	Publishing Failed	11/19/2013 09:09:04	11/19/2013 09:09:06	11/19/2013 09:09:52	10	Failed to publish
	Daily Signals	AMYC	Publishing Completed	11/19/2013 09:00:48	11/19/2013 09:00:50	11/19/2013 09:00:55	10	
	Unused Transmitters	DLRWEB	Report Completed	11/19/2013 07:41:19	11/19/2013 07:41:20	11/19/2013 07:41:20	10	
	Unused Transmitters	DLRWEB	Report Completed	11/19/2013 07:39:57	11/19/2013 07:39:58	11/19/2013 07:39:58	10	
	Unrestored Signals	DLRWEB	Report Completed	11/19/2013 07:39:19	11/19/2013 07:39:21	11/19/2013 07:39:21	10	
	Permit Expiration	DLRWEB	Report Completed	11/19/2013 07:38:58	11/19/2013 07:38:58	11/19/2013 07:38:58	10	
	Permit Exception	DLRWEB	Report Completed	11/19/2013 07:38:31	11/19/2013 07:38:32	11/19/2013 07:38:32	10	
	Customer Masterfile	DLRWEB	Report Completed	11/19/2013 07:36:41	11/19/2013 07:36:43	11/19/2013 07:36:43	10	
	Daily Signals	DLRWEB	Report Completed	11/19/2013 07:35:24	11/19/2013 07:35:28	11/19/2013 07:35:31	10	
	Customer Status	DLRWEB	Report Completed	11/19/2013 07:34:31	11/19/2013 07:34:33	11/19/2013 07:34:33	10	
	Customer Add/Delete	DLRWEB	Report Completed	11/19/2013 07:32:31	11/19/2013 07:32:33	11/19/2013 07:32:52	10	
	Customer Activity	DLRWEB	Publishing Completed	11/19/2013 07:28:14	11/19/2013 07:28:14	11/19/2013 07:28:18	10	
	Alarm Detail	DLRWEB	Report Completed	11/19/2013 07:27:32	11/19/2013 07:27:34	11/19/2013 07:27:34	10	
	Customer Activity	DATA	Publishing Completed	11/18/2013 14:58:47	11/18/2013 14:58:48	11/18/2013 14:58:51	10	
	Customer Activity	DLRWEB	Report Completed	11/18/2013 14:44:26	11/18/2013 14:44:27	11/18/2013 14:44:27	10	
	Alarm Detail	DLRWEB	Report Completed	11/18/2013 14:38:23	11/18/2013 14:38:25	11/18/2013 14:38:25	10	
	Daily Signals (Amy)	AMYC	Publishing Completed	11/18/2013 13:50:26	11/18/2013 13:50:27	11/18/2013 13:50:29	10	
	Daily Signals	AMYC	Publishing Completed	11/18/2013 12:25:53	11/18/2013 12:25:54	11/18/2013 12:25:56	10	
	Customer Activity	AMYC	Publishing Completed	11/18/2013 12:15:37	11/18/2013 12:15:38	11/18/2013 12:15:41	10	
	Customer Activity 3001	BOLDNET	Publishing Failed	11/18/2013 11:49:00	11/18/2013 11:49:02	11/18/2013 11:51:28	10	Failed to publish
	Daily Signals	BOLD	Report Completed	11/18/2013 11:36:29	11/18/2013 11:36:30	11/18/2013 11:36:31	10	
	Customer Activity for customer	BOLD	Publishing Failed	11/18/2013 09:09:03	11/18/2013 09:09:03	11/18/2013 09:09:48	10	Failed to publish
	Daily Signals	AMYC	Publishing Completed	11/18/2013 09:00:52	11/18/2013 09:00:54	11/18/2013 09:00:55	10	
	Customer Activity	BOLD1	Publishing Completed	11/18/2013 07:00:02	11/18/2013 07:00:03	11/18/2013 07:00:06	10	
	Daily Signals (Amy)	AMYC	Publishing Completed	11/17/2013 13:50:24	11/17/2013 13:50:25	11/17/2013 13:50:27	10	
	Daily Signals	AMYC	Publishing Completed	11/17/2013 12:25:53	11/17/2013 12:25:54	11/17/2013 12:25:55	10	
	Customer Activity	AMYC	Publishing Completed	11/17/2013 12:15:38	11/17/2013 12:15:39	11/17/2013 12:15:41	10	
	Customer Activity 3001	BOLDNET	Publishing Failed	11/17/2013 11:49:03	11/17/2013 11:49:05	11/17/2013 11:51:33	10	Failed to publish


Publishing Destinations					
	Name	Type	Destination	Status	Error Message
▶	Company	Printer	PRINTSERVER01	Failed	Invalid or unreachable printer specified

Report Queue

The *Report Queue* can also be easily accessed from the Quick-Launch toolbar by clicking on the Report Queue button: .

## Preview a Queued Report

To preview a report in the queue list, select the desired report by clicking on it in the list and then clicking the **Preview** button. The selected report will now be displayed for viewing.

 *Users may now edit this copy or print it locally. Changes made in the report viewer will not affect the report of the copy held in the queue.*

## View Reports for a Specific User

By default, only reports published or queued for preview by the current user will be displayed.

- To display reports queued for a specific user, type the user name into the **User** field in the filter area of the workspace and then click the **Filter** button. Reports for the specific user will now be displayed in the report queue area.
- To remove a filter you have applied, click "Remove Filter."

## Filter the Queue by a Specific Date/Time

To view reports that have been queued for publishing at a specific date or time, but have not yet been published, specify the date range and times in the fields provided within the filter area.

Users can also view reports according to how they will be published by checking or un-checking the following parameters.

The screenshot shows the 'Report Queue Filter' window. It contains three main sections for filtering reports:

- Report Type:** A list of report categories with checkboxes, including Access Control Card Formats, Alarm Detail, and Customer Activity.
- Report Status:** A list of report states with checkboxes, including Pending, Queued, Running, and Publishing.
- Submission Time:** Fields for Date From, Date To, Start Time, and Finish Time, each with a date and time picker.

Additional options include a User ID field, a 'Newest at top' checkbox, and 'Search' and 'Clear' buttons. At the bottom of the window are 'Queue' and 'Filter' buttons.

Report Queue Filter

- **Ad-Hoc** – reports that have been requested by system users on an "as required" basis.
- **Scheduled (run once)** – reports that have been pre-programmed to publish automatically at a specific time or date.
- **Scheduled (repeating)** – reports that have been pre-programmed to publish automatically at a certain time or day on a recurring basis.

When the required parameters have been selected, click the **Filter** button. Only reports that fully meet the selected criteria will now be displayed.

## Show All Reports

Clicking on the **Show All** button located next to the **Filter** button on the *Scheduled Reports* window will display all reports currently scheduled.

## Scheduled Reports

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



contains a list of all report publishing instructions that currently exist in the system. Any instruction contained in the list can be selected for viewing or editing by clicking the appropriate row. The *Publishing Destinations* section provides a list of recipients for the instruction selected in the upper pane.

Please note that scheduling reports cannot be done from the Reports menu, but rather in the Customer, Dealer, Monitoring Company, Agency, Branch and Global Keyholder records.

For example, to schedule a report for a Dealer, the user must select the Dealer from the Dealer menu and schedule the reports using the form found in the Jump To menu. The following form is a general form used in a customer context, but can be easily adapted for each entity.

The screenshot shows a software interface with two main sections. The top section, titled 'Scheduled Reports', contains a table with the following columns: Description, Interval, Interval Type, Report Name, Last Run, Next Run, and User ID. Below this is a section titled 'Publishing Destinations' with a table containing columns: Name, Type, and Destination. To the right of these sections is a 'Jump To' menu with a list of options: Customer, Details, Options, Systems, Services, O/C Schedules, Contact List, Call Lists, Attentions, Permits, Comments, Action Patterns, Workflow Compon, Workflow, General Schedule, Plans, Reverse Command, User Defined, Reports (which is selected), On Test Status, Zone Status, Reverse Send, Maintenance Issue, Activity Log, and Access Control. At the bottom of the window are four tabs: Schedule, Reports, Distribution, and Frequency.

Scheduled Reports, Publishing Destinations

## Schedule a Report

Prior to attempting to schedule a report, it is recommended the user become familiar with the procedures contained in the [System Reports](#).

1. Open the *Scheduled Reports* window by clicking on **Reports** in the **Jump To** menu of the particular record you would like to set up a schedule for (Dealer, Customer, Monitoring Company, etc).
2. Click the **Add New** button in the upper right corner of the form to add a new report.
3. Select the specific report required from the list in the tree now displayed to the left of the form.

Users may have to expand the items in the list in order to find the desired report.

**Activity**

- Alarm Cause Summary
- Alarm Detail
- Customer Activity
- Daily Signals
- Unrestored Signals
- Custom
- Maintenance
- Master File
- System

**Select report from Reports List**

**Alarm Cause Summary**

Report Description:

From :  To :

Customer ID

Customer name

Dealer ID

Authority ID

Branch ID

Group

Class

☐ NACOSS Events Only

Authority types required ☐ Police ☐ Fire ☐ Medical

Alarm Type ☐ False ☐ Genuine ☐ Both

Group by ☐ Customer ☐ Dealer ☐ Authority ☐ Branch ☐ Event Category

Dispatched ☐ All ☐ Dispatched ☐ Not Dispatched

Scheduled Reports, Add New Report

4. Complete the relevant fields on the report details form and click **Next**.

### Script Messages Sent with E-mailed Reports

The default script message that is sent with E-mailed reports can be found in the Supervisor Workstation under the Tools > Options > Reports menu. To edit the script message, go to the Supervisor Workstation > Maintenance menu > Script Messages.

### Edit an Existing Publishing Instruction

At times, it may be necessary to change the content of existing publishing instructions.

1. Open the *Report Queue* by clicking on the **Reports** menu and selecting **Report Queue**.
2. Select the publishing instruction that needs to be changed by clicking the appropriate row of the *Scheduled Reports* list.

Description	Interval	Interval Type	Report Name	Last Run	Next Run	User
Daily Signals	1	None (run once)	Daily Signals		03/16/2007 13:23:46	BT

Scheduled Reports, selecting report

3. Click the **Edit** button.
4. Click the **Edit Selected** button.
5. Change any necessary details on the reports pages, distribution criteria or the frequency criteria.
6. When the editing is complete, click **Finish**.
7. Click **Save**.

## Data Entry

Data and records are the heart of the Manitou software. Without the necessary data, the system does not perform its function. Records for Customers, Dealers, and other entities must be created within the system for all other functions such as [Alarm Handling](#), [Account Maintenance](#) and [Managing Reports](#) to work properly.

Various types of records reside within the Manitou system such as Customer, Dealer, Agency, etc. Certain types of information are required to create and save different record types; however, the Customer record could be considered the most important and detailed of all record types.

For an overview of records, please refer to the [Record Overviews](#) section of this guide.

## Add a Customer

When creating a new customer there are four core forms that require completion in order to get signals into the account, know where to send the authorities and contact the premises. This chapter covers how to successfully create a new Customer in Manitou.

*These steps assume no linking to an accounting package.*

### Adding a New Customer

To add a new customer, begin by selecting **Maintenance Menu | Add New Customer**.

Select the appropriate setup method:

- [Create a new Customer](#) - starts with a blank customer record and all fields require attention
- [Create a new Customer based on an existing Customer](#) - allows an Operator to copy information from existing accounts with similar settings

Create a new Customer

## Creating a New Customer Record

### Create a new Customer

Selecting the **Create a new Customer** radio button will initiate the *New Customer Information* section fields requiring information.

All fields with an asterisk are required; when populated, the asterisk turns from red to black.

- **Customer ID** - This field is discretionary and can be based off any alpha/numeric/special character sequence. It can also be setup for auto-generation. For more information on auto-generating Customer ID's, see the Supervisor or Manager at the facility.
- **A/R Company** - Select the appropriate company from the drop-down list provided. If the appropriate information is not listed, see the Supervisor or Manager at the facility.
- **A/R Number** - Company-specific, alpha/numeric identifier
- **Name** - Company name

If the customer name will be different for filing purposes, use the ellipsis button ( ) to the right of the **Name** field to designate the filing name.

- **Premises Type** - Commercial or Residential

- **Country** - Country pertaining to the account
- **Language** - Language pertaining to the account
- **Time Zone** - Time Zone, region pertaining to the account


➤ Once all fields have been filled in, click **Next** to advance to the [Address](#) section of the new customer.

## Create a new Customer based on an existing Customer


Choosing the **Create a new Customer based on existing Customer** radio button has been selected, the screen sections will populate with fields requiring information.

1. In the *Copy From Customer* section, input or search for the **Customer ID** to load the existing record to copy from (for more information on searching for customer records, see [Customer Lookup by Customer ID](#)).
2. When the existing customer record has been pulled up, populate the following required, basic information fields within the *New Customer Information* section:
  - **Customer ID**
  - **Name**
  - **Premises Type** (commercial or residential)
  - **Country**
  - **Language**
  - **Time Zone**
3. Once all necessary fields are populated, click **Next**. The screen will then show the new customer information and related [Address](#) section.

## New Customer Address

1. To input/edit the address information for the new customer, click the **House** button within the *Address* section.
2. In the *Edit Address* window, type in the zip/postal code and type **<Enter>** or click the **Search** button (  ). If a matching zip/postal code is in the database, a window will present possible city, state or province (depending on location) options. If so, select the applicable city and press **<Enter>** or click **Search**. If not, tab to or click in the **City** field and enter the city name then tab to the **State** (Province) field and choose the applicable selection.

3. Type in the primary physical address in the **Address 1** field. Type any supplemental address information, such as Suite/Apt/Other further address details in the **Address 2** field

 *The physical address fields are configurable from within the Supervisor Workstation; therefore, it these fields may be listed as "Street 1" and "Street 2" or other.*

- ☛ **It is strongly recommended not to use punctuation or atypical abbreviations in these fields as it may cause issues within the database.**

4. Whenever applicable, enter in the Cross Street and Subdivision information.

- ☛ **Cross street and subdivision information is used by authorities to locate the customer site in emergency situations.**

5. Click **OK** or press <Enter>.

6. When all the data for the *Address* form is entered, it will now be necessary to input customer [Details](#) in to the record.

Once the Customer address has been entered, you will have a variety of options on the "Jump To" list located on the right side of the screen. To continue adding customer details, for instance, select **Details** from the **Jump To** list. The *Details* list contains contact information for the customer, including phone number, e-mail, Dealer, Branch and Authority information.

## New Customer Details

The *Details* form of a Customer Record contains contact information pertaining to the account such as phone numbers, email and internet addresses, as well as authorities associated with this location.

Select the **Details** form from the **Jump To** menu.

The screenshot shows the 'New Customer, Details page' with the following sections:

- Contact:** Fields for Site, Home, Business, and Mobile phone numbers, each with a dropdown menu and a Notepad icon.
- E-mail:** Field for E-Mail with a dropdown menu and a PDF icon.
- Web:** Field for Web Address.
- Dealer:** Field for Dealer with a dropdown menu.
- Branch:** Field for Branch with a dropdown menu.
- Authorities:** Fields for Police, Fire, and Medical with dropdown menus.

On the right side, there is a 'Jump To' menu with a list of options: Customer, Details (selected), Options, Systems, Services, O/C Schedules, Contact List, Call Lists, Attentions, Permits, Comments, Action Patterns, General Schedules, Plans, Reverse Command, User Defined, Reports, On Test Status, Zone Status, Reverse Send, Maintenance Issue, Activity Log, and Access Control.

New Customer, Details page

## Contact Phone Numbers

Enter in any/all site specific telephone numbers in to the fields provided in the *Contact* section of the *Details* page.

### Private Phone Numbers

There are instances where a site or person may wish to make their number(s) private to Operators. Manitou CS is set up to manage this option if preferred.

1. To make a contact point private, click the **Notepad** icon directly to the left of the phone number to be made private and select **Properties** from the drop-down list.

The screenshot shows the 'Contact' section with fields for Mobile, Home, Business, and Site. The 'Mobile' field contains the number '(719) 555 1212'. A context menu is open over the 'Mobile' field, showing options: Properties, Dial, and Remove.

Phone Number, Properties

2. When the *Properties* dialogue box comes up select the **Private** checkbox.

The screenshot shows the 'Contact Point Properties' dialog box. It has fields for Site, Extension, and Script. The 'Site' field contains '(719) 555-5555'. The 'Private' checkbox is checked and circled in red. There are 'OK' and 'Cancel' buttons at the bottom.

Contact Point Properties, Private

3. The phone number will now display as private, with asterisks instead of numbers:

The screenshot shows a 'Contact' form with a yellow telephone icon. It has four rows: 'Site', 'Home', 'Business', and 'Mobile'. Each row has a dropdown arrow, a small icon, and a text field. The 'Site' field contains 'XXXXXXXXXX'. The 'Home' field contains '[444] 444-4444'. The 'Business' and 'Mobile' fields are empty. Each text field has a small red square at the end.

Private Number

Once the private setting is selected, asterisks will be placed everywhere in the Manitou client, including activity logs, reports, and so forth. The actual value of the contact point is still stored in the database and can be used by the [Auto-dialer](#).

The only way to reveal a private phone number is by clicking the **Show** button on the Auto-dialer, which will display the number as well as log in the [System Log](#) that the number has been revealed. The only exception to this is the ticket printer which will always print out the actual values of contact points, regardless of their private status.

## Private Phone Numbers and Reports

When a report fails to publish, the System Log entry created replaces hidden destination addresses with "\*\*\*\*\*". The address is saved in the database for auditing purposes, but not revealed to the clients.

## Exposed Private Numbers

There are a few additional places where private contact points may be exposed:


- Contact points that are synchronized with accounting systems (Navision, Sedona, Quickbooks). The contact points are still hidden in Manitou, but may be visible in the accounting software.
- Contact search dialog: results are hidden when returned, but if the Operator can guess the value of a private contact point, this could be used to verify that their guess was correct.
- The monitoring company's callback number for pages (Options setting) is linked to a company's Contact Point. This means that if this number is marked private, it can still be viewed in the Options form in the Supervisor Workstation.
- Retransmission reverse commands can embed contact points in their parameter values. The resulting signals are logged by the FEP in the system application log and in FEP debug files.

## Email

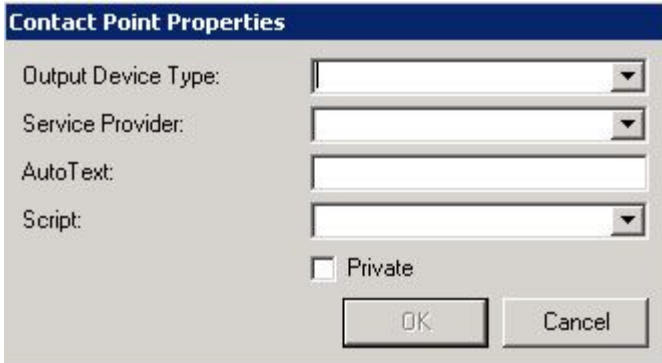


Customers may receive their weekly reports via email and in such a case, the email field needs to be populated. By default, reports are e-mailed in PDF format but this can be changed to RTF (Rich Text Format) simply by clicking the PDF drop-down menu.

Enter any/all site specific email addresses.


 *PDF vs. RTF is for report output. PDFs are “images” of documents and are not editable, while RTF is an editable form document that can be copied and edited.*

1. Click the **Notepad** icon directly to the left of the phone number to be made private and select **Properties** from the drop-down list.

The image shows a dialog box titled "Contact Point Properties". It contains four fields: "Output Device Type:" with a dropdown arrow, "Service Provider:" with a dropdown arrow, "AutoText:" with a text input field, and "Script:" with a dropdown arrow. Below these fields is a checkbox labeled "Private". At the bottom are "OK" and "Cancel" buttons.

Contact Point Properties

2. The *E-mail Contact Point Properties* may be used to specify scripts E-mailed to the customer in the event a certain type of signal is received.
3. Select the **Output Device Type**.
4. Select the **Service Provider** and **Script** if applicable. These properties will be pre-defined in the Supervisor Workstation.
5. Select **Private** if the email address is to be obscured. This will result in the email field showing only asterisks.
6. Click **OK**.
7. To enter more than one e-mail address, click on the down arrow to the left of the *E-mail* field and select **E-mail 2** or **E-mail 3**.

 *The Manitou system is set to a default of 3 email addresses for record details; however, this is an unlimited contact type that is specified in the Supervisor Workstation.*

## Web

Although rarely used, a web address for the customer record may be added in the *Web*

section of the *Details* page.

1. Click in the **Web Address** field to enter a web address for this customer. Manitou will automatically copy the text after the @ symbol in the E-mail address and adds "www" to auto-fill the Web address.
2. If a different URL is necessary, enter the correct web address. By default, the web address is highlighted for correction or removal.

## Dealer and Branch

1. Select the **Dealer** and **Branch** applicable to the account.
2. Click the drop-down arrow to the right of the **Dealer** field and select the applicable Dealer for the account. For more information on setting up Dealer accounts, see the section [Operator Workstation: Dealers](#) in this manual.
3. Click the drop-down arrow to the right of the **Branch** field and select the applicable Branch for the account. For more information on setting up Branches, see the section [Operator Workstation: Branch](#) in this manual.

## Authority

1. Select the **Police, Fire and Medical Authorities** applicable to the account.
2. Click the drop-down arrow to the right of the **Police** field and select the applicable Police department for this account. For more information on setting up Authorities, see the section [Operator Workstation: Authority](#) in this manual.
3. Click the drop-down arrow to the right of the **Fire** field to select the applicable Fire department.
4. Click the drop-down arrow to the right of the **Medical** field and select the applicable Medical branch for this account.
5. Review all items for accuracy and click **Save**.

Upon completion of the applicable *Details* fields, select the [Options](#) form on the **Jump To** menu to set specific standards within the software for this particular account.

## New Customer Options

The *Options* form stores additional data for the account, such as Passwords, Codes, Options, and Script messages.

1. Select **Options** from the **Jump To** menu. The *Options* page will appear.

**Passwords**

Password	Duress	Description
TOWER	<input type="checkbox"/>	General
*	<input type="checkbox"/>	

**Codes**

Group Code:

Class Code:

Monitoring Group:

**Options**

☐ Ignore Aborts ☐ Generate Unexpected Restores

☐ Auto Cancel ☐ Verify Panel User No.

Area Fill:

Zone Fill:

Time Format:

**Underwriters Laboratories**

UL Grade:

UL Response Time:  (Minutes)


**Default Script Message**

{DT} Event Date  
 {TM} Event Time  
 {ET} Event Description  
 {PR} Event Priority  
 {DE} Event Code  
 {CA} Event Category  
 {AR} Event Area

Add Demo

New Customer Options

- Enter any Global (group) passwords and select whether the password will be used in **Duress**. A **Description** of the password can also be added here. This password will be used to verify cancelling alarms when the central station contacts the customer.
  - ☛ **Manitou offers the ability to have named duress passwords. Duress passwords are used to inform the Operator that a situation does exist without alerting others in the area.** If it is a Duress password, it should be easy to remember and innocuous to prevent tipping off an assailant in the event that an Authority should be dispatched to the premises.
  - 📁 *Only those passwords used by multiple individuals should be listed here; individual passwords will be input in the [Contact List](#).*
- If applicable, select choices within the *Codes* section - **Group Code**, **Class Code** and **Monitoring Group**.
  - 📁 *Drop-down menus found within the Codes section are set up by a Supervisor or Manager within the Supervisor Workstation. For more information about Group and Class Codes, please see a Supervisor or Manager of the facility.*
- The fields in the *Options* section cover different functions with alarms. Primarily, the **Area Fill** option is used to select **Add/Update**, which allows the system to automatically add any undefined areas received within signals and reduces Operator confusion.


- If necessary for this account, check the **Ignore Aborts** checkbox. When Event Codes are set up in the Supervisor Workstation, certain signal processing attributes may allow an Operator to cancel an alarm which will ignore all other alarms associated with that account. Checking the **Ignore Aborts** checkbox will still allow the signals to be processed.
  - If necessary, check the **Auto-Cancel** checkbox. This command allows a signal to be canceled or aborted when the appropriate cancel signal arrives. This signal is defined in the *Transmitter Programming Commands* in the Supervisor Workstation.
  - If this account should generate unexpected restores, click the **Generate Unexpected Restores** checkbox.
  - Check the **Verify Panel User No.** checkbox if necessary.
  - In the **Area Fill** section, select the appropriate action.
  - In the **Zone Fill** section, select the appropriate action.
  - Select the **Time Format** from the drop-down menu.
5. The *UL* section pertains to those accounts that require a **UL Grade** category selection as well as a **Response Time**. This section is rarely used.
6. Default script messages are used with Fax, Email and/or Texting notifications. Click in the top **Default Script Message** blank box under and type the default account script message - there is no character limit for script messages. When it is necessary to add an element from the listing click the appropriate item to highlight then click **Add**. Repeat this process until the Script Message is complete . For a demo of the text, click the **Demo** button; the example text will appear in the lower blank *Script Message* box. If no fax, email, or texting will be used, there is no need to add any script messages.
-  *Script messages can also be configured globally through the Supervisor workstation and applied individually.*

Script Message Example

7. Once all data applicable on this form is selected or entered go to the [Systems](#) form on the **Jump To** menu.


## New Customer Systems

The *Systems* form is considered the “heart” of the account as it sets the configuration of how a signal will find this account when it arrives from the receiver. The *Systems* page covers four different types of systems: Event Monitoring, Access Control, GPS and Other (user-defined). While readily available, most alarm monitoring sites choose to only setup Event Monitoring systems.

 *For customers integrated with an accounting system, Manitou Systems will be tied to accounting systems as well.*

## Event Monitoring

1. To begin, click to highlight **Event Monitoring** from the tree then click the **Add** button, or **<Alt +A>**.
2. The **System Number** is automatically applied but can be changed using the **Up** and **Down** arrows located to the right of the field or on the keyboard.


 *The System Number field is numeric only and has a limit of 65,535.*

•  **Once applied and saved, the System Number cannot be changed.**

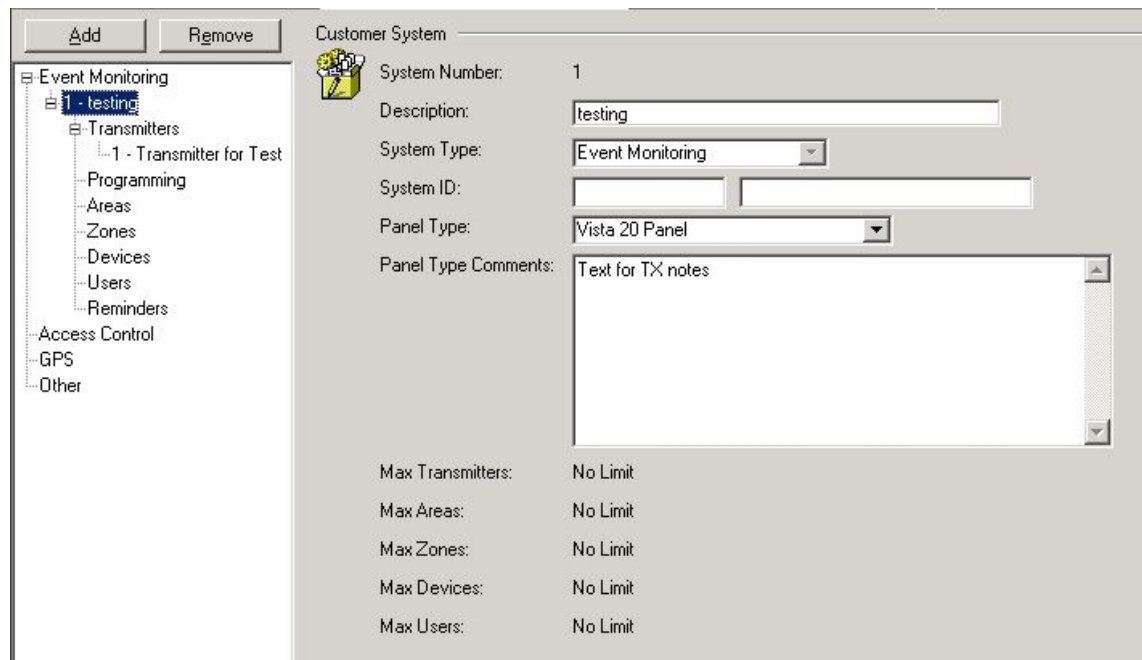
3. Enter a **Description**. Some sites use the name of the service offered such as Burglary, Fire, etc.; however, this is completely up to the individual monitoring company.

•  **This is a required field with a limit of 35 characters.**

4. The System type should already be set to **Event Monitoring**. If it is not, use the drop-down list to select it.
5. Select the **Monitoring Type**. In most cases, this will be **Alarms Only**. **Alarms Only** means you are monitoring the alarm events and bringing them to an Operator's 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.*

6. Click **OK**. The *Customer System* form will now appear.



Customer Record System form

7. Additional fields may be populated if needed:

- **System ID** - Is used if linked to accounting.
- **Panel Types** - May be selected from the list on the *System* form. If the panel type is

known, specific comments such as "press # # to reset" may be added so that an Operator does not have to locate a guide for the panel to assist in an alarm.

- **Panel Type Comments** - Used often by customers to describe the panel, pieces housed within it and disarming or other related instructions.

*It is often recommended to place these details within the Special Instructions field of the Customer Record/Comments form instead of Panel Type Comments so that they can be made available for alarm handling, if desired.*

Once any additional fields on the *Customer System* form are populated, the selections in the node tree below the *System* can be configured individually.

## Event Maps

Event Maps provide definitions of Event Codes used within Manitou and can be used to view any Event Code that may appear in a Manitou screen. This function is particularly useful for identifying less-frequently encountered codes.

To view Event Maps, click on the **View** menu > **Event Maps**.

The screenshot shows the 'Event Mapping' window with a title bar. Below the title bar is a section labeled 'Event Maps' with a small icon and a 'Protocol Format' dropdown menu set to 'Radionics 6600'. The main area contains a table with four columns: 'Message', 'Event', 'Description', and 'Comments'. The table lists various event codes and their corresponding descriptions and comments. An 'OK' button is located at the bottom right of the window.

Message	Event	Description	Comments
_*	LF	Listening Begin	Audio In
_E	FS	Fire Supervisory	Fire Supervisory
_F	FA	Fire Alarm	Fire Alarm
_I	DN	Door Left Open	Door Left Open (Status)
_J	BS	Burglary Supervisory	Supervisory (non-fire)
_K	UG	0	Unverified Events
_L	ZA	Freeze Alarm	Low Temperature
_M	UZ	Untyped Missing Alm	Missing Alarm
_Q	XK	0	Sensor Trouble
_U	PA	Panic Alarm	User Alarm
_V	UY	Untyped Missing Trbl	Missing Trouble
_W	CW	Was Force Armed	Force Armed
_Y	YX	Service Required	Diagnostic
_Z	BX	Burglary Test	Walk Test Point
AD	DG	Access Granted	Access Granted
AG	DD	Access Denied	Access Denied
AL	DY	Door Locked	Door Locked
AO	DN	Door Left Open	Door Left Open
AS	DC	Access Closed	Door Secured
AU	DO	Access Open	Door Unlocked
FS	FL	0	Alarm Silenced

Event Maps, Event Codes


Event Maps is a read-only display summary. Users may select a **Protocol** from the *Protocol*

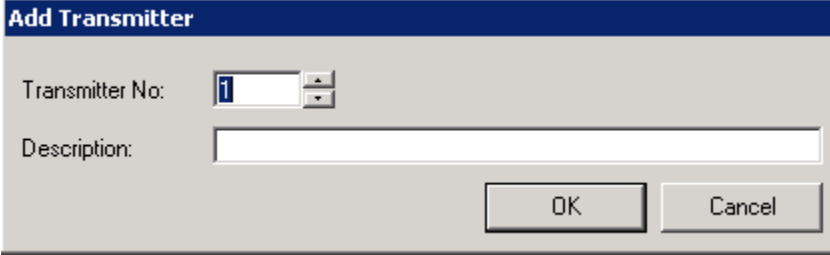
*Format* drop-down list and view the configured Event Maps and associated protocols, but will not be able to change settings, etc. For a full explanation on how to set up Event Codes and Event Maps, please refer to the *Manitou CS Supervisor Workstation User Guide* at the Bold Support Portal.

## Transmitters

Once an Event Monitoring system has been added, the Transmitters for the system require setup. Transmitters allow routing of signals from the receiver to the Manitou Client, and then to the correct customer information. Each system may have multiple transmitters. Additionally, each Event type system can have its own control panel type.

1. Click **Transmitters** in the node tree below **Event Monitoring**, then click the **Add** button (or **Alt + A**) at the top of the file node.
2. Similar to the *System* screen, the **Transmitter Number** is automatically applied, but can be altered to fit individuals needs. This is an inventory number such as #1 is the first transmitter on this account.

 *Transmitters may be referred to as Communicators, Dialers, etc.*



Add Transmitter


3. Enter an optional **Description** (limit 35 characters). This is often entered as the Panel Type or piece of equipment out at the location for ease of access to that information. This is completely up to the individual monitoring company.
4. Click **OK**.



## Transmitter Details

Now that the transmitter has been created, details pertaining to the transmitter can be configured on the *Transmitter* form.

1. The **Transmitter Number** cannot be changed; however, the **Description** can be edited if needed by typing directly in to the field provided.
2. Select the applicable **Transmitter Type** from the drop-down list provided. The **Transmitter Type** is what Manitou uses for default programming and event translation. If only a single type of signaling site is used, the **DEF** (Default) Transmitter Type may be the only selection needed.
3. Select the **Receiver Line Prefix**. The **Receiver Line Prefix** is how account numbers can be separated by the line or telephone number dialed.
4. Enter the **Transmitter ID**. This is the account number coming from the panel out at the location through the receiver.

 The blue arrow located to the right of the **Transmitter ID** field is used to specify a range if the customer has that available for the Receiver/Line Designation.

5. Choose the **TX Protocol Type** from the drop-down list provided.
6. If **Caller ID** is applicable, enter the appropriate information in the **Caller ID** fields.
7. If **Remote Address** (IP address) is available and applicable, enter the appropriate information in the **Remote Address** field.

## Transmitter Dates

Primarily used for tracking, this section allows a user to specify the actual dates the transmitter was setup and when that connection has been terminated.

If needed, input the information for when the path was enabled, as well as connection and termination date.

### Transmitter Options, Test & Notes

1. Select any options by clicking on the appropriate checkboxes that may apply to the Transmitter, such as if **Any Activity Satisfies Test** for signaling activity constitutes a test to satisfy the Transmitter Test interval.
  - **Generate Restore Overdues:** Select this option enables the user to program time-out periods for events that restore event programming. If Manitou does not receive a restore signal within the time-out period, the Transmitter generates a new alarm called "Restore Overdue".
  - **Any Activity Satisfies Test:** Selecting this option determines that any event Manitou receivers will satisfy the test requirements for the Transmitter interval.
  - **Extended Signaling:** Selecting this checkbox determines that the Transmitter will send signals in an extended format. The Receiver driver recognizes the event as extended signaling and waits for the secondary signal to arrive within the designated waiting period.
  - **Do not use Dealer Programming:** Selecting this option prevents the Manitou client from checking the Customer's Dealer record for specific alarm instructions. Dealer programming is configured in the Dealer programming form.
  - **Generate L-T-T only when Closed:** Select this checkbox if you want Manitou to generate a L-T-T alarm only when the premises are closed.
  - **Regular Activity Expected:** Selecting this checkbox indicates to Manitou that it can expect activity from this Transmitter on a regular basis.
  - **Audio Capable:** Select this checkbox if the Transmitter is capable of Transmitting audio signals for alarm confirmation.
  - **Create Call Session (no listen in):** Manitou normally receives audio signals in two parts. The first part of an audio signal is the alarm. The second part of the signal informs Manitou that an audio communication will soon arrive, and that it needs to listen in for its arrival. Certain signals, however, arrive in two parts like audio signals, but are not solely comprised of audio. The Linear 4200 Panel, for instance, sends an IP signal and then sends a cellular voice call. The MediaGateway 2 was not previously capable of creating the listen in component for an alarm signal. Selecting this checkbox creates a session to receive cellular voice calls for signals

when no listen in session is created.

- **Drop Listen In if no Alarm:** Select this option to end the listen in session if no audio component arrives within the timeout time.
- **Video Capable:** Select this checkbox if the Transmitter is capable of transmitting video signals for alarm confirmation.
- **Raw Event Programming:** Select this checkbox to enable raw event programming for your Transmitter. This provides the ability to program raw signals instead of post-translation signals. This option is often selected when a site converts to Manitou from an older system.
- **Monitored Transmission Path:** Select this checkbox if the communications path between the Transmitter and the Central Station should be monitored. If the communications path is severed, it generates an alarm.
- **Encrypted:** Selecting this option indicates that the Transmitter is encryption-enabled, and will transmit encrypted signals into Manitou.
- **Backup Transmitter:** Select this checkbox if the Transmitter is a backup Transmitter.

2. When applicable enter in a **Transmitter Test Interval**. The increment number and then **Minutes, Hours or Days** for the **Interval**.

🔊 **Adding a Transmitter Test on the Transmitters form will automatically add the service to the Services form.**

📁 *Manitou requires services to match the intervals. If no services match the interval, the record will not save until the interval is entered into the Supervisor Workstation or removed from the record.*

3. Type any notes and/or additional details pertaining to the **Transmitter** in to the **Notes** field.
4. Repeat steps for any additional **Transmitters** needed for this Customer Record.
5. Once all **Transmitters** and details are entered, click **Programming** on the left-hand tree.

📁 *A transmitter will be considered to belong to a GPS system if it is not a VertX transmitter and its Remote Address looks like a phone number.*

## Multiple Test Timers

Multiple test timers are first set up in the Supervisor Workstation > Event Codes. Users must take the code that is coming in and change it to a code with the soft programming attribute of "t". This lets the system know that the test signal should not be applied to the main

transmitter.

In the Operator Workstation, programming must be set up at the customer Transmitter Programming level to redirect the incoming signal.

1	#E602	*			RP1	Auto Test - MultiSy	=	SY2	=	WEEKLY TEST
---	-------	---	--	--	-----	---------------------	---	-----	---	-------------

In the above example, #E602 on Zone 0 is redirected to a code "RP1" on Zone SY2. Users cannot specify zero as the zone; it must be left blank as Manitou will strip zeros. You may also use an asterisk ( \* ) instead of a blank zone, but caution that if different panels exist and all may be sending an E602 signal, but with different zone numbers. Using an asterisk will take precedence over all other programming lines when used with raw programming.

1. Click on the *Transmitters* form under *Systems* and enter the transmitter test interval.

**Transmitter**

Transmitter No: 1

Description: default

Transmitter Type: DFLT

Receiver Line Prefix: 99

Transmitter ID: 9207

TX Protocol Type:

Caller ID 1:

Caller ID 2:

Remote Address:

**Transmitter Dates**

Path-Enabled Date: 10/21/2013

Connect Date: 10/21/2013

Termination Date: 10/22/2016

**Options**

☒ Generate Restore Overdues

☐ Any Activity Satisfies Test

☒ Extended Signaling

☒ Do not use Dealer Programming

☒ Generate L-T-T Only When Closed

☒ Regular Activity Expected

☐ Audio Capable

☐ Create Call Session (No Listen-In)

☐ Drop Listen-In if no Alarm

☐ Video Capable

☒ Raw Event Programming

☐ Monitored Transmission Path


☐ Encrypted

☐ Backup Transmitter

**Transmitter Test**

Interval: 30 Days


2. Set up the [Transmitter Linking](#) in the primary system. This linking is based off of the zones that were redirected in [Transmitter Programming](#).



Transmitter Linking							
							
	Output				Redirect		
	TX	Area	Zone	Event Category	System	Area	Zone
▶	1	*	SY2		2	=	=
	1	*	SY3		3	=	=

Transmitter Linking

## Programming

Programming, when needed, is used to enter customer-specific overrides.

 For additional information on Non-intelligent Signal Programming, please refer to the [Non-intelligent Signal Programming.pdf](#)

Transmitter Programming																																																																				
 Show merged Transmitter Programming for Transmitter: <input type="text" value="None"/> <input type="button" value="Sort"/>																																																																				
Input						Output																																																														
TX	DES	Area	Zone	Sensor	Event	Description	Area	Zone	Sensor	Point ID	Commands																																																									
*	*A	1	1	*	BA	Burglary Alarm	=	=	=																																																											
*	*T	*	*	*	*T	Trouble	=	=	=		CanCancel																																																									
*	BA	1	1	*	FA	Fire Alarm	=	=	=																																																											
<div>  Event Actions Programming <input type="button" value="Sort"/> </div> <table border="1"> <thead> <tr> <th>Event</th> <th>TX</th> <th>Area</th> <th>Zone</th> <th>Alarm</th> <th>Action ID</th> <th>Instructions</th> </tr> </thead> <tbody> <tr> <td>▶ BA</td> <td>*</td> <td>*</td> <td>*</td> <td>Default</td> <td>BURG1</td> <td></td> </tr> <tr> <td>BA</td> <td>*</td> <td>1</td> <td>1</td> <td>Default</td> <td>BURGVID</td> <td></td> </tr> <tr> <td>CH</td> <td>*</td> <td>*</td> <td>*</td> <td>Default</td> <td>VIDTOUR</td> <td></td> </tr> <tr> <td>FA</td> <td>*</td> <td>*</td> <td>*</td> <td>Default</td> <td>FIRE</td> <td></td> </tr> <tr> <td>HA</td> <td>*</td> <td>*</td> <td>*</td> <td>Default</td> <td>HA2</td> <td></td> </tr> <tr> <td>MA</td> <td>*</td> <td>*</td> <td>*</td> <td>Default</td> <td>MED</td> <td></td> </tr> <tr> <td>*</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>													Event	TX	Area	Zone	Alarm	Action ID	Instructions	▶ BA	*	*	*	Default	BURG1		BA	*	1	1	Default	BURGVID		CH	*	*	*	Default	VIDTOUR		FA	*	*	*	Default	FIRE		HA	*	*	*	Default	HA2		MA	*	*	*	Default	MED		*						
Event	TX	Area	Zone	Alarm	Action ID	Instructions																																																														
▶ BA	*	*	*	Default	BURG1																																																															
BA	*	1	1	Default	BURGVID																																																															
CH	*	*	*	Default	VIDTOUR																																																															
FA	*	*	*	Default	FIRE																																																															
HA	*	*	*	Default	HA2																																																															
MA	*	*	*	Default	MED																																																															
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Transmitter Programming

1. Open the *Programming* form by clicking on **Programming** node in the *Systems* list.
2. Click into the empty cell (last row) under the **TX** cell. A drop-down arrow will appear.
3. Click on the drop-down arrow and select the Transmitter from the drop-down menu.
4. Tab to the **DES** column and select the appropriate event code from the drop-down list.
5. Tab into the **Event** cell and click on the drop-down arrow. Select an event code from the list. This will automatically populate the **Description** field as well.

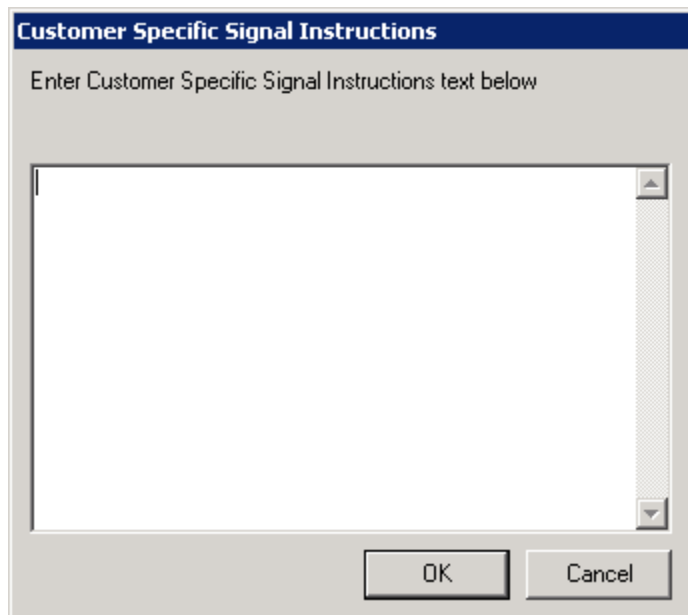
6. Select an **Area**, **Zone** and **Sensor** from the drop-down menus, if applicable, or choose "=" to use the **Area**, **Zone** and **Sensor** information selected in the previous *Input* section of the table.
7. Enter a **Point ID** (a description of the area) if appropriate as well as **Commands** and **Help** if needed.

**Note:** if you are adding a Linear Transmitter, you must also add an "Audio" command as shown in the following screenshot:

Transmitter Programming											
		Show merged Transmitter Programming for Transmitter:		None		Sort					
TX	DES	Input			Event	Description	Output			Specific Processing	
		Area	Zone	Sensor			Area	Zone	Sensor	Point ID	Help
*	*A	*	30	*	*E	Test	=	30	=		
3	*A	*	34	*	MA	Medical Alarm	=	=	=	Audio(Yes, 2)	
3		*	*	*			=	=	=		
*											

## Event Actions Programming

1. Click in the **Event** cell and select an event from the drop-down list.
2. Tab into the **TX** (Transmitter) cell and select a transmitter from the drop-down menu.
3. In the **Area** and **Zone** cells, select an area and zone from the drop-down menu.
4. In the **Alarm** cell, select **Yes**, **No** or **Default** from the drop-down menu.
  - Yes - will sound an alarm every time the parameters are met.
  - No - will not sound an alarm when the parameters are met.
  - Default - will set the system to execute its programming based on the parameters.
5. In the **Action ID**, select an Action if appropriate.
6. In the **Instructions** cell, click on the ellipses button to bring up the *Customer Specific Signal Instructions* box.

A screenshot of a software dialog box titled "Customer Specific Signal Instructions". The title bar is dark blue with white text. Below the title bar, the text "Enter Customer Specific Signal Instructions text below" is displayed. The main area of the dialog box is a large, empty white rectangular field with a vertical scrollbar on the right side. At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".


7. Enter any specific instructions pertaining to the Customer. The instructions entered here will appear on the *Notes* tab of the *Alarm Handling* screen.
8. Click **OK**.
9. Once finished, review all items for accuracy.
10. When completed, click **Areas** underneath *Event Monitoring* on the left-hand tree.

## Transmitter Linking

When a second system is added to Event Monitoring, Transmitter Linking becomes available. Transmitter Linking is used with sub-accounts and is used to direct signals to other systems of the same customer or to other systems of a sub-account. This allows for more control of signal redirection.

For example, Zone 1 signals from Transmitter 1 of System 1 can be redirected, but Zone 1 signals from Transmitter 2 of the same System can be left alone.

Transmitter Linking



	Output				Redirect			
	TX	Area	Zone	Event Category	Sub Account	System	Area	Zone
▶	1	2	1		492	1	1	=
	1	2	2		492	1	1	=
	1	2	3		494	1	1	1
	1	2	4		494	1	1	2
*								

Transmitter Linking with a sub-account

Transmitter linking can also be used to map messages to a different event monitoring system within the same account (e.g., separate Fire and Burglary systems are set up but the messages are physically received from the same transmitter).


Sub-account directing is no longer on the Area and Zone grids. A new grid exists at the transmitter level that is used to direct signals to other systems of the same customer or to other systems of a sub-account. This replaces the transmitter linking grid that is no longer needed. This allows for more control of signal redirection. For example, Zone 1 signals from Transmitter 1 of System 1 can be redirected, but Zone 1 signals from Transmitter 2 of the same System can be left alone.

## Areas and Zones

Once Transmitters have been set up for the Event Monitoring, Areas and Zones may be added. 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 that alarms are sending a signal. Zones are a smaller unit and several Zones can fit inside one Area.







**Zones & Areas**






---

**System Zones**

	Zone	Signal	Description
	1	 Received a Si	Kitchen
	2	 Never Receive	Living Room
			

---

**System Areas**


	Area	Description	Status
	1	Default Area	 Unknown
			

Zones &amp; Areas

## Areas

**Areas** are panel partitions. Many accounts may only have one area or no area at all. However, if [Open/Close Schedules](#) will be monitored, it will be necessary to enter the Areas involved in opening and closing events.

1. Enter the **Area Number**.
2. Tab to the **Schedule** field and select a schedule from the drop-down list, if applicable.

 *Schedules are set up within the Supervisor Workstation. For more information regarding scheduling, contact an on-site Supervisor or Manager at the facility.*

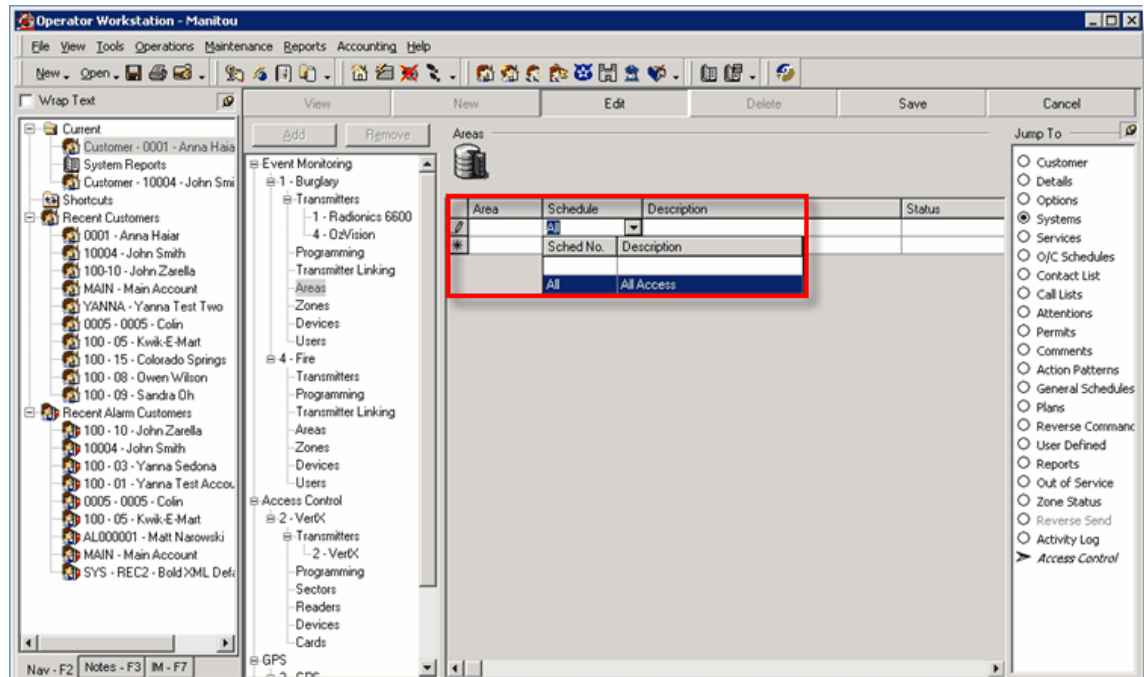
3. Tab to the **Description** field and enter the location's description.

## All Access Schedules

All Schedules allows a system to send opening and closing signals for the sole purpose of logging the signals. While Manitou 1.4.9 allowed users to add an Open/Close service even if no area had a schedule attached, Manitou 1.5 does not allow this. 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.

To select an All Access schedule, simply click in the **Schedule** field of the *Areas* form and select **All Access**.



All Access Schedule

4. Repeat as necessary for all areas sent in by panels.
5. Once all **Areas** are entered, select the **Zones** form in the left-hand tree.

## Zones

The *Zones* form lists physical locations within an area or location such as - Zone 1 is the Front Door.

1. Enter the **Area**, or select from the drop-down list. If the Area isn't known or does not exist, an asterisk (\*) may be used to indicate Any or No Area.
2. Enter the **Zone** number.

*It is not necessary to enter a leading zero (zero as a first number) if it is present in the Zone number. Manitou strips leading zeros so they are not necessary in data entry.*

3. Enter the **Zone Description**, if desired. Limit 50 characters.
4. Repeat until all physical locations are listed in the *Zones* form and tied to their applicable areas if existing.

**Customer System**

System Number: 1

Description: Burglary System

System Type: Event Monitoring

System ID:

Panel Type: All

Max Transmitters: 99

Max Areas: No Limit

Max Zones: No Limit

Max Devices: No Limit

Max Users: No Limit

Customer System

Zones can be deleted as a group instead of having to delete each zone individually.

### Importing Areas and Zones

Operators can import Areas and Zones from a data source, such as Excel, into the customer's System. This dialog allows a quick paste (single cell and multi-row) of external data.

**Areas Import**

Area	Description
4	bedroom
5	bathroom
*	

Load Cancel

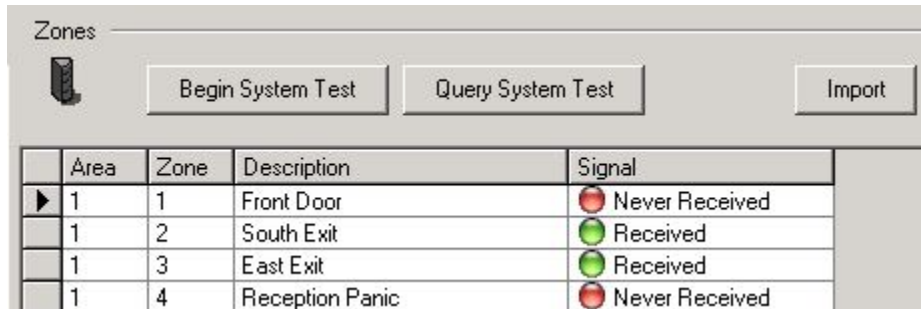
Areas Import window

For full row or multi-row data, begin pasting the data in the first column. Users may use

the *Ctrl-V* command to paste data.

## System and Query Tests

System and Query tests may be performed once an Area and Zone have been set up. The System test will test the Zones/Areas to see if a signal has been received. Once the signal is received, the Signal Status will change to "Received Signal." If a signal has not been received, the status will change to "Never Received."



	Area	Zone	Description	Signal
▶	1	1	Front Door	Never Received
	1	2	South Exit	Received
	1	3	East Exit	Received
	1	4	Reception Panic	Never Received

System and Query Tests

### System Test

1. To perform a System Test, simply click on the **Begin System Test** button located above the *System Zones* area.
2. Click **Yes** to begin the System Test.
3. If the System is Active, a prompt will appear, asking to continue. Click **Yes**.

If the Zone system is active, the Signal Status will change. If it is not active, the Signal Status will remain red.

### Query System Test

The *Query System Test* tool can be used to see how many Zones received a signal and how many Zones have not received a signal. The user can also complete a System Test from the Query Test as well.

To perform the Query test, click on the **Query System Test** button. The results (Zones received and Zones not received) will appear in the Query Test box. To perform a System Test, check the **Perform System Test** box and click **OK**.

## Devices

Devices can be used for additional monitoring and may be configured for cameras, microphones, control/sensor, URL or doors. These items can be put on a Plan and actioned if a connect or control device is added.

Devices

Transmitter No:

AXIS1 - Axis 1  
CAM1 - Entrance PTZ  
DM1 - Dedicated Micros  
DM2 - DM2

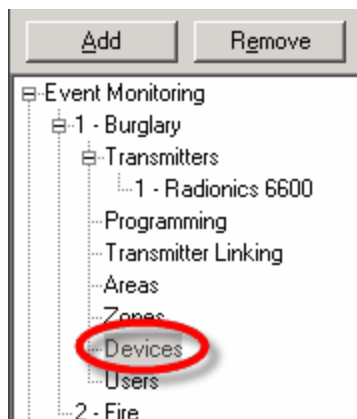
Device ID: AXIS1  
Type: Camera (Video)  
Description: Axis 1  
Unit ID:   
Unit Sub-ID:   
Address: 172.16.142.220  
Options: user=root&password=16stone&uimode=ptz-relative&networktimeout=5000&mediatype=mjpeg  
Area:   
Zone:   
Link ID:   
Reverse Route:   
Video Type: AXIS MEDIA CONTROL

Reverse Command	Description
-----------------	-------------

Devices form

## Add a Device

1. Once a system, such as a burglary system, has been added to Event Monitoring, select **Devices** from the *Event Monitoring* tree.



2. Click on the **Add** button above the *Event Monitoring* tree.

The screenshot shows a standard Windows-style dialog box titled "Add Device". It has a light gray background and a dark blue title bar. Inside, there are four labeled input fields: "Device ID" with a text box, "Device Type" with a dropdown arrow, "Description" with a text box, and "Copy From" with a dropdown arrow. At the bottom right, there are two buttons labeled "OK" and "Cancel".

Add Device

3. Enter the **Device ID**. This is a unique 12-character ID identifying the device.

*For devices attached to an access control system, the Device ID is automatically set for use when creating it. This is necessary so that the Signal Handler can match messages received with the appropriate device.*

4. Select the **Device Type** from the drop-down menu: **Camera (Video)**, **Microphone (Audio)**, **Control (Output)**, **Sensor (Input)**, **URL/other** or **Door**.
5. Enter a brief description into the **Description** field.
6. Click **OK**.
7. Back at the main Devices form, refer to the Manitou Audio/Video Configuration document to enter the following parameters:
  - Unit ID
  - Unit Sub-ID
  - Address
  - Options

These parameters change depending on the type and model of device selected.

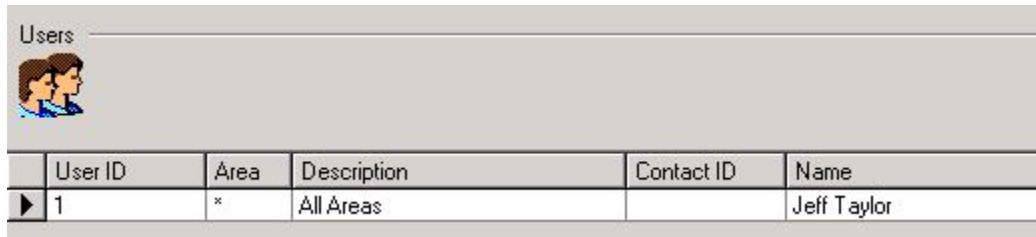
8. Enter the **Area** and **Zone** linked to the Device.
9. Select the **Link ID**, if applicable.
10. Select the **Reverse Route**, if applicable.
11. Select the **Video Type** from the drop-down menu.

## Users

Users are tied into the Contact List. When a new contact is set up for a customer, a User ID may be assigned to the contact under the Details tab. For more information on assigning

User IDs, see the [Maintenance: Contact List](#) section of this manual.

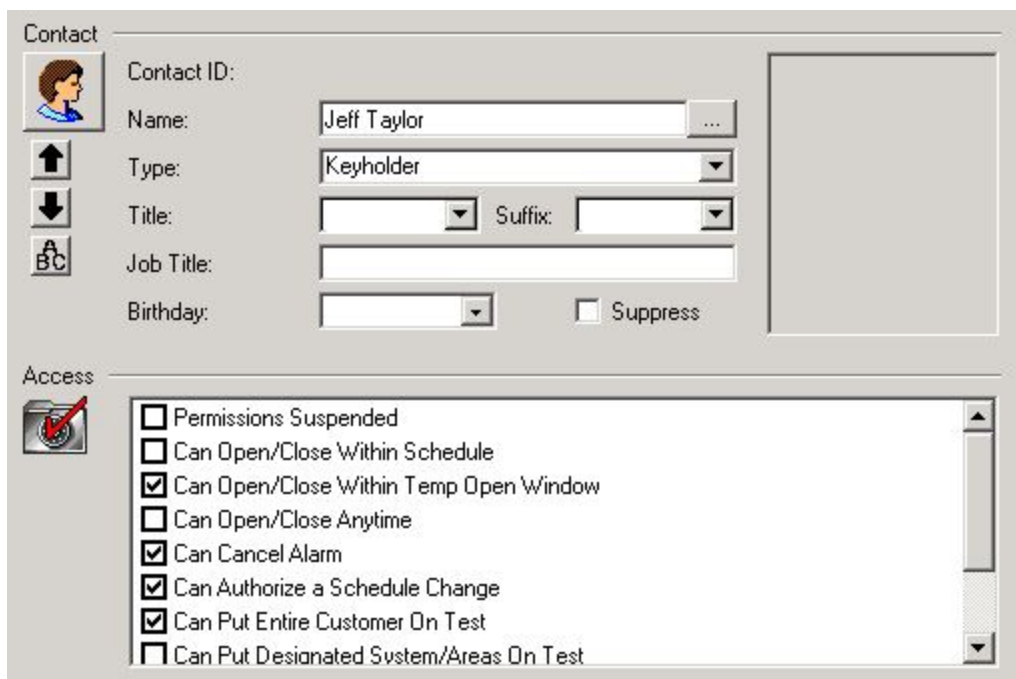
Once a User ID has been assigned to a Contact, the contacts will automatically appear in the Users form under Systems.



User ID	Area	Description	Contact ID	Name
1	*	All Areas		Jeff Taylor

Users

Though this screen is read-only, access details can be changed by double-clicking on a **User ID** and editing the *Access* section of the *Contact* information.



**Contact**

Contact ID:

Name:

Type:

Title:  Suffix:

Job Title:

Birthday:  ☐ Suppress

**Access**

- ☐ Permissions Suspended
- ☐ Can Open/Close Within Schedule
- ☒ Can Open/Close Within Temp Open Window
- ☐ Can Open/Close Anytime
- ☒ Can Cancel Alarm
- ☒ Can Authorize a Schedule Change
- ☒ Can Put Entire Customer On Test
- ☐ Can Put Designated System/Areas On Test

Users, Contact Access Edit

From here, users can allow access, specify areas, and enter/edit User IDs. Once changes are made, click **Save** at the top of the page.

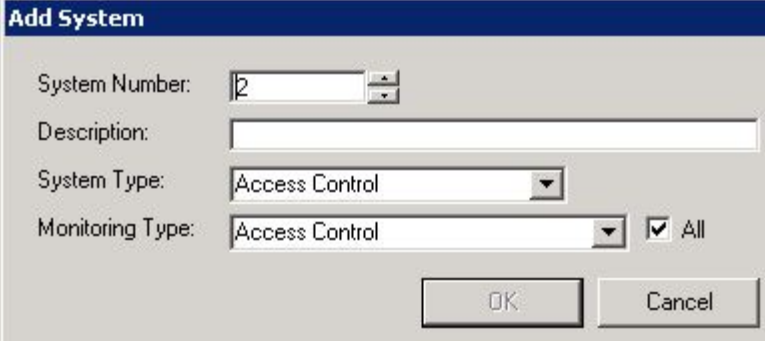
## Reminders

Please see the [Data Entry, GPS: Reminders](#) topic for further information.

## Access Control

1. Click **Access Control** from the left-hand tree.

2. Click on the **Add** button located above the System tree.
3. The **System Number** will be automatically generated, or can be typed in or adjusted using the up and down arrows located to the right of the *System Number* field.
4. Enter "**VertX**" into the **Description** field.
5. Select **Access Control** from the **System Type** drop-down menu, if it is not already selected.



Access Control, Add System

6. Select the **Monitoring Type** (select **All**, if needed).
7. Click **OK**.
8. Back at the main *Customer System* screen, enter the **System ID**.



Customer System

System Number: 2

Description: Access Control for Door #2

System Type: Access Control

System ID:

Gateway No.: 0

External Customer No.: 0

Panel Type:

Panel Type Comments:

Max Transmitters: No Limit

Max Sectors: No Limit

Max Readers: No Limit

Max Devices: No Limit

Max Cards: No Limit

Customer System, Access Control

9. Select the **Panel Type** from the drop-down menu.

Based on the *Panel Type* selected, the maximum number of transmitters may be lower than the maximum amount set in the Monitoring Types form in the Supervisor Workstation. If this occurs, Manitou will use the lower number of transmitters allowed.

Based on the type of Event Monitoring selected, additional forms may appear, such as Transmitters, Programming, Sectors, Readers, Devices, Cards and Reminders.

## Transmitters

After the initial set up, a VertX Access Controller is added to the system as a transmitter. Some information needed to complete transmitter set up will be collected during the customer hardware installation.

1. Select **Transmitters** from the *Access Control* tree and click on the **Add** button. The *Add Transmitter* box will appear.
2. Enter a brief description for the transmitter and click **OK**.
3. Back at the *Transmitter* form, select the appropriate **Transmitter Type**, V1K or V2K, from the **Transmitter Type** drop-down menu.

4. Select the **Receiver Line Prefix** of the Bold IP Receiver from the drop-down menu.
5. Enter the correct six character of the VertX access controller's MAC address in the **Transmitter ID** field. Remove any leading zeros from the address. If any letters in the address exist, enter them using capital letters.
6. In the **Remote Address** field, enter the VertX Public IP address followed by ":4050". The number 4050 is the TCP port number that is used to connect to the VertX access controller.
7. Check **VertX Access Control Device** in the *Options* section of the form. This will enable the **Access Control** section of the *Jump To* menu.
8. Enter a **Transmitter Test Interval**. The VertX access controller has a maximum test interval of one day.

## Programming

In order to guarantee proper signal processing, programming is required for every system. Programming defines and decodes information received from the transmitters through the receivers.

For instance, a transmitter may send a generic message that an alarm sounded in a specific [Area or Zone](#). The receiver passes this message on to the application. However, without the proper programming, the system is unable to decipher what activation in the area/zone means. Therefore, programming exists to translate the activation on that area/zone to a burglary, fire, or other alarm. Programming will also allow for the definition of specific actions to complete on the alarm, such as call police and then Keyholder on the account.

Transmitter Programming

Show merged Transmitter Programming for Transmitter:

	Input			Output			Specific Processing		
	TX	DES	Sensor	Event	Description	Sensor	Point ID	Commands	Help
*									

Event Actions Programming

	Event	TX	Alarm	Action ID	Instructions
*					

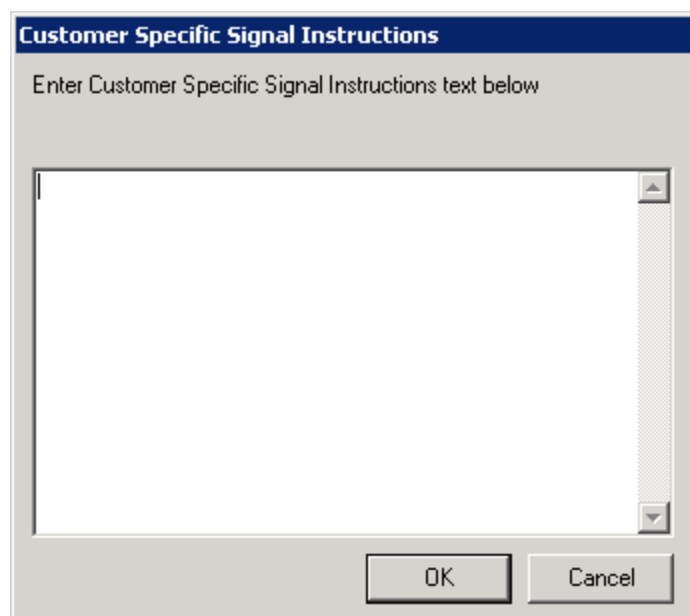
Transmitter Programming

1. Open the *Programming* form by clicking on **Programming** link in the *Access Control* list.
2. If necessary, lick on the **New** button at the top of the screen.
3. Click into the empty cell under the **TX** and select the transmitter from the drop-down menu.
4. Tab into the **DES** (Description) cell and select a description of the incoming item. For example, if this is a Burglary Verified, select BV from the list.
5. Tab into the **Area** cell and select an area from the drop-down menu, if applicable.
6. Tab into the **Zone** cell and select a zone, if applicable.
7. Tab into the **Sensor** cell and select a Sensor, if applicable.
8. Tab into the **Event** cell and select an Event from the list, if applicable.
9. Enter a brief description into the **Description** cell of the Event.
10. Enter the **Area**, **Zone** and **Sensor**, if appropriate.
11. Enter a **Point ID** (a description of the area), if appropriate.
12. Click **Save**.

### Event Actions Programming

1. Click in the **Event** cell and select an event from the drop-down list.

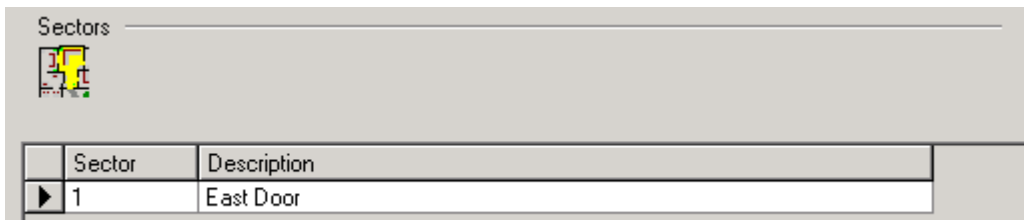
2. Tab into the **TX** (Transmitter) cell and select a TX from the drop-down menu.
3. In the **Area** and **Zone** cells, select an Area and Zone from the drop-down menus.
4. In the **Alarm** cell, select the appropriate response from the drop-down menu. Selecting **Yes** will sound an alarm every time the parameters are met. Selecting **No** will not sound an alarm when the parameters are met. Selecting **Default** will set the system to execute its programming based on the parameters.
5. In the **Action ID** cell, select an Action Pattern, if applicable.
6. In the **Instructions** cell, click on the ellipses button to bring up the *Customer Specific Signal Instructions* box.



7. Enter any specific instructions pertaining to the Customer. The instructions entered here will appear on the *Notes* tab of the [Alarm Handling](#) screen.
8. Click **OK**.
9. Once finished, review all items for accuracy and click **Save**.

## Sectors

Sectors can be used to track where persons are located. For example, an office building may have three sectors. The first sector may be set up for outside of the building, while the second sector is the inside of the building, and the third sector is executive offices. When a person uses their access card to gain entry into the building, Access Control will record that a person went from outside the building to inside the building based on the sectors set up on the Reader.



Sector	Description
1	East Door

### Add a Sector

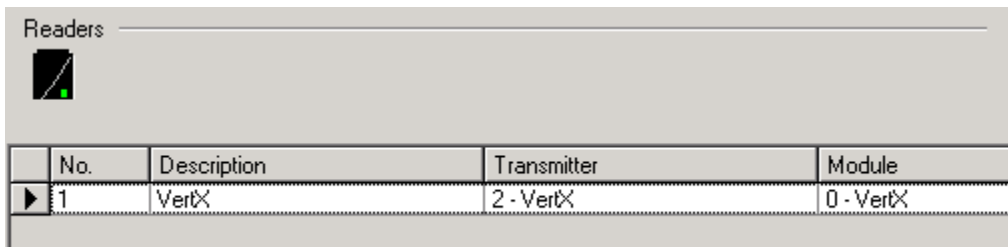
1. If necessary, click on the **New** button.
2. In the **Sector** field, enter the number of the sector. This is used for identification purposes.
3. Enter a brief description into the **Description** field.
4. Enter any additional sectors by repeating the process.
5. When finished, click **Save**.

## Readers

Readers pertain to the actual hardware reader that is installed near site entries and exits and is used to swipe an access card to gain access to a door. The reader is connected to a module. Each module can have two readers: one reader on the 0 (zero) port and one on the 1 port. Depending on the type of hardware used, such as cards only or pin pads, the options entered into Manitou on the reader form may vary.

Before a Reader may be added to the customer account, the type of Reader must be added to the Access Control for the customer account. See the [Maintenance Menu: Access Control](#) section of this document for further instruction on adding Access Control to an account.

Once the Reader has been added and configured, it will automatically display in the Readers section of the Access Control System Setup. The form will display the Reader number, description, the transmitter associated with the reader, and the module:



No.	Description	Transmitter	Module
1	VertX	2 - VertX	0 - VertX

Readers form

## Devices

Please refer to the [Event Monitoring: Device](#) section.

## Cards

Cards are initially set up in the [Contact List](#). Once a contact has been added to the Access Control System with a transmitter has been added to the [System](#), a new *Access Control Cards* tab will appear in the *Contact List* form.

Access Control Cards

Card	Transmitter	Card Set	PIN


Card Number:      Transmitter:      Card ID:      PIN:      Escort Card:      Elevator In-Sched Group:      Elevator Out-Sched Group:      Pin Cmds Allowed      Extended Access

Access Levels:      Reuse time:      Access Type:      Card Set:      Add      Remove      Convert      Raw Hex Number

Access Control Cards

Once cards have been entered into the Contact List, the card information will automatically show up in the *Cards* section of the Access Control system:

Cards




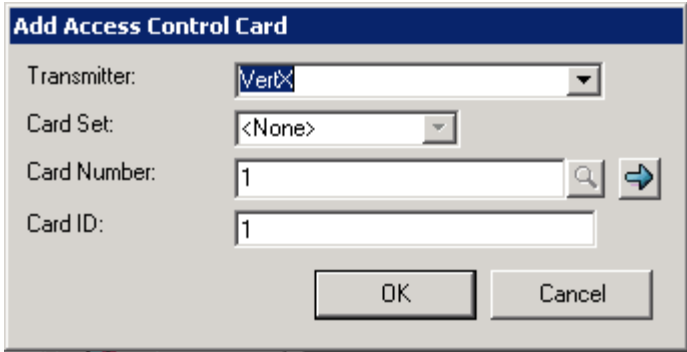
	TX	Description	Card ID	Contact ID	Name	Last Ac
▶	2	VertX	1		David Haiar	

Cards table

Users can double-click on a card to bring up the *Access Control Cards* tab in the Contact List. From there, information can be edited and saved.


## Add a Card

1. Once the basic Access Control system and transmitter have been added, select **Contact List** from the *Jump To* menu.
2. Select the appropriate contact from the *Contacts* tree.
3. Click on the *Access Control Cards* tab  on the right-hand side of the form.
4. Click on the **Add** button to bring up the *Add Access Control Card* box.



Access Control Card, Add New

5. Select the **Transmitter** from the drop-down menu if it has not already been selected.
6. Select the **Card Set** from the drop-down menu.
7. Enter the **Card Number** and **Card ID**. These two numbers must match.
8. Click **OK**.
9. Back at the *Access Control Cards* form, enter the **PIN** number associated with the card, if applicable.

 A PIN code of "0" (zero) means there is no PIN code associated with the card.

10. Select the **Access Type** from the drop-down menu. This is the type of access granted by the card.
11. Select the **Escort Card** associated with the card, if applicable.
12. Enter the **Reuse Time**. This is the time, in minutes, before an alarm is generated.
13. Select the **Access Levels**, if any, that the card belongs to. There may be a maximum of eight access levels that assign and limit access.
14. Select the **Elevator In-Sched Group** from the drop-down list if the card belongs to a schedule within an elevator group.
15. Select the **Elevator Out-Sched Group** from the drop-down list. This is an elevator group that the card belongs to when out of a schedule, such as after hours.
16. Check the **Pin Cmds Allowed** box if the card holder is allowed to implement PIN commands.
17. Check the **Extended Access** box if extended access is on, such as longer grant access time for a physically handicapped person.
18. Check the **Passback Allowed** box if the card should be exempt from anti-passback.
19. When finished, click **Save**.

### Access Card Lookup

Users may add a card list of un-decoded cards in raw hex value only. From this form, users can also convert a raw hex number into a card by clicking on the **Convert** button.

Once the **Convert** box appears, change the **Card Number** and **Card ID** to the appropriate values.

Access Card Lookup

## Reminders

Please see the [Data Entry, GPS: Reminders](#) topic for further information.




## GPS


GPS systems provide location information about assets for tracking, locating and other directional-based services.

### Transmitters

The *Transmitters* form allows Operators to install and customize Transmitters for a specific Customer account. Prior to saving a new Customer account, Operators must enter a minimum of one Transmitter.

1. Click **Transmitters** in the node tree below **GPS**, then click the **Add** button (or **Alt + A**) at the top of the file node.
2. Similar to the *System* screen, the **Transmitter Number** is automatically applied, but can be altered to fit individuals needs. This is an inventory number such as #1 is the first transmitter on this account.

 *Transmitters may be referred to as Communicators, Dialers, etc.*



Add Transmitter

3. Enter an optional **Description** (limit 35 characters). This is often entered as the Panel Type or piece of equipment out at the location for ease of access to that information. This is completely up to the individual monitoring company.
4. Click **OK**.

**Transmitter**

Transmitter No: 3

Description: GPS Test Transmitter

Transmitter Type: [dropdown] ☒ All

Receiver Line Prefix: [dropdown] Caller ID 1: [text]

Transmitter ID: [dropdown] Caller ID 2: [text]

TX Protocol Type: [dropdown] Remote Address: [text]

**Transmitter Dates**

Path-Enabled Date: [dropdown]

Connect Date: [dropdown]

Termination Date: [dropdown]

**Options**

☐ Generate Restore Overdues ☐ Audio Capable ☐ Backup Transmitter

☐ Any Activity Satisfies Test ☐ Drop Listen-In if no Alarm

☐ Extended Signaling ☐ Video Capable

☐ Do not use Dealer Programming ☐ Raw Event Programming

☐ Generate L-T-T Only When Closed ☐ Monitored Transmission Path

☐ Regular Activity Expected ☐ Encrypted

**Transmitter Test**

Interval: [text] [dropdown]

**Notes**

[text area]

GPS Transmitter form

## Transmitter Details

Now that the transmitter has been created, details pertaining to the transmitter can be configured on the *Transmitter* form.

1. The **Transmitter Number** cannot be changed; however, the **Description** can be edited if needed by typing directly in to the field provided.
2. Select the applicable **Transmitter Type** from the drop-down list provided. The **Transmitter Type** is what Manitou uses for default programming and event translation. If only a single type of signaling site is used, the **DEF** (Default) Transmitter Type may be the only selection needed.
3. Select the **Receiver Line Prefix**. The **Receiver Line Prefix** is how account numbers can be separated by the line or telephone number dialed.
4. Enter the **Transmitter ID**. This is the account number coming from the panel out at the location through the receiver.

The blue arrow located to the right of the Transmitter ID field is used to specify a

*range if the customer has that available for the Receiver/Line Designation.*

5. Choose the **TX Protocol Type** from the drop-down list provided.
6. If **Caller ID** is applicable, enter the appropriate information in the **Caller ID** fields.
7. If **Remote Address** (IP address) is available and applicable, enter the appropriate information in the **Remote Address** field.

### Transmitter Dates

Primarily used for tracking, this section allows a user to specify the actual dates the transmitter was setup and when that connection has been terminated.

If needed, input the information for when the path was enabled, as well as connection and termination date.

### Transmitter Options, Test & Notes

1. Select any options by clicking on the appropriate checkboxes that may apply to the Transmitter, such as if **Any Activity Satisfies Test** for signaling activity constitutes a test to satisfy the Transmitter Test interval.
  - **Generate Restore Overdues** – This option allows for the programming of time-out periods for events that restore event programming required. If no restore is received within the time-out period, a new alarm is generated called “Restore Overdue.”
  - **Any Activity Satisfies Test** – This option indicates that if the Transmitter receives any event (such as an open, close, burglary, fire or other event), the event will satisfy the test requirements for the interval. This option is only available when a Service for Transmitter Test is also selected.
  - **Extended Signaling** – Setting this flag will state that this Transmitter sends in an Extended format. This does not trigger a wait time on signals received from the Transmitter. The Receiver driver will recognize the event based on its format as extended signaling and will wait for the secondary signal in the designated wait period. The wait period is previously defined and cannot be changed or configured by an end user.
  - **Regular Activity Expected** – Checking this option signifies that activity (events) are expected to be received on a regular basis.
  - **Do not use Dealer programming** – This will prevent the Manitou client from checking the customer’s Dealer record for what to do when a specific alarm is received. Dealer programming is set up in the Dealer programming form.
  - **Generate L-T-T only when closed** – This will generate a Late-to-Test event when the

site is closed (armed).


- **Audio/Video Capable** - These two check boxes are only enabled when the Audio and/or Video Monitoring Services are selected for the account. They simply flag the transmitter to allow audio and/or video signals to be sent.
  - **Raw Event Programming** – This allows the ability to program raw signals instead of how they are translated either through the receiver drivers or within Event Maps. This is often turned on when a site is converting from an older system into Manitou. However, it is most often not necessary on new accounts added into the Manitou system.
  - **Monitored Transmission Path** – This sets a flag on the transmitter that the transmitter keeps an open path of communication alive and when severed the transmission path will generate an alarm and show the status red or green for error or okay, respectively.
2. When applicable, enter in a **Transmitter Test Interval**. The increment number and then **Minutes, Hours, or Days** for the **Interval**.

**Note:** Manitou generates a late-to-test signal according to the interval you set for minutes and hours. That means that if you set the Transmitter Test Interval to 4 hours and a late-to-test signal generates, a subsequent late-to-test signal will generate every 4 hours. For days, however, Manitou generates late-to-test signals every day after an initial late-to-test signal is received. To avoid this result, set the Transmitter Test Interval to hours instead of days. For example, 744 hours is equal to a 31 day monthly test.

**Note:** Adding a Transmitter Test on the Transmitters form will automatically add the service to the Services form.

**Note:** Manitou requires services to match the intervals. If no services match the interval, the record will not save until the interval is entered into the Supervisor workstation or removed from the record.

3. Type any notes and/or additional details pertaining to the **Transmitter** in to the **Notes** field.
4. Repeat steps for any additional **Transmitters** needed for this Customer Record.
5. Once all **Transmitters** and details are entered, click **Programming** on the left-hand tree.

 *A transmitter will be considered to belong to a GPS system if it is not a VertX transmitter and its Remote Address looks like a phone number.*

## Multiple Test Timers

Multiple test timers are first set up in the Supervisor Workstation > Event Codes. Users must

take the code that is coming in and change it to a code with the soft programming attribute of "t". This lets the system know that the test signal should not be applied to the main transmitter.

In the Operator Workstation, programming must be set up at the customer Transmitter Programming level to redirect the incoming signal.

1	#E602	*		RP1	Auto Test - MultiSy	=	SY2	=	WEEKLY TEST
---	-------	---	--	-----	---------------------	---	-----	---	-------------

In the above example, #E602 on Zone 0 is redirected to a code "RP1" on Zone SY2. Users cannot specific zero as the zone; it must be left blank as Manitou will strip zeros. You may also use an asterisk ( \* ) instead of a blank zone, but caution that if different panels exist and all may be sending an E602 signal, but with different zone numbers. Using an asterisk will take precedence over all other programming lines when used with raw programming.

1. Click on the *Transmitters* form under *Systems* and enter the transmitter test interval.

**Transmitter**

Transmitter No: 2

Description: 35002102-A

Transmitter Type: DFLT ☒ All

Receiver Line Prefix: ZZ

Transmitter ID: 35002102-A

TX Protocol Type:

Caller ID 1:

Caller ID 2:

Remote Address:

**Transmitter Dates**

Path-Enabled Date:

Connect Date:

Termination Date:

**Options**

☐ Generate Restore Overdues ☐ Audio Capable

☐ Any Activity Satisfies Test ☐ Video Capable

☐ Extended Signaling ☐ Raw Event Programming

☐ Do not use Dealer Programming ☐ Monitored Transmission Path

☐ Generate L-T-T Only When Closed ☐ Backup Transmitter


☐ Regular Activity Expected

**Transmitter Test**

Interval: 169 Hours

Transmitter Test Interval

2. Set up the [Transmitter Linking](#) in the primary system. This linking is based off of the zones that were redirected in [Transmitter Programming](#).


Transmitter Linking							
							
	Output				Redirect		
	TX	Area	Zone	Event Category	System	Area	Zone
▶	1	*	SY2		2	=	=
	1	*	SY3		3	=	=

Transmitter Linking


## Programming

In order to guarantee proper signal processing, programming is required for every system. Programming defines and decodes information received from the transmitters through the receivers.

For instance, a transmitter may send a generic message that an alarm sounded in a specific [Area or Zone](#). The receiver passes this message on to the application. However, without the proper programming, the system is unable to decipher what activation in the area/zone means. Therefore, programming exists to translate the activation on that area/zone to a burglary, fire, or other alarm. Programming will also allow for the definition of specific actions to complete on the alarm, such as call police and then Keyholder on the account.

Transmitter Programming									
 Show merged Transmitter Programming for Transmitter: <input type="text" value="None"/> <input type="button" value="Sort"/>									
	Input			Output			Specific Processing		
	TX	DES	Sensor	Event	Description	Sensor	Point ID	Commands	Help
*									

Event Actions Programming					
 <input type="button" value="Sort"/>					
	Event	TX	Alarm	Action ID	Instructions
*					

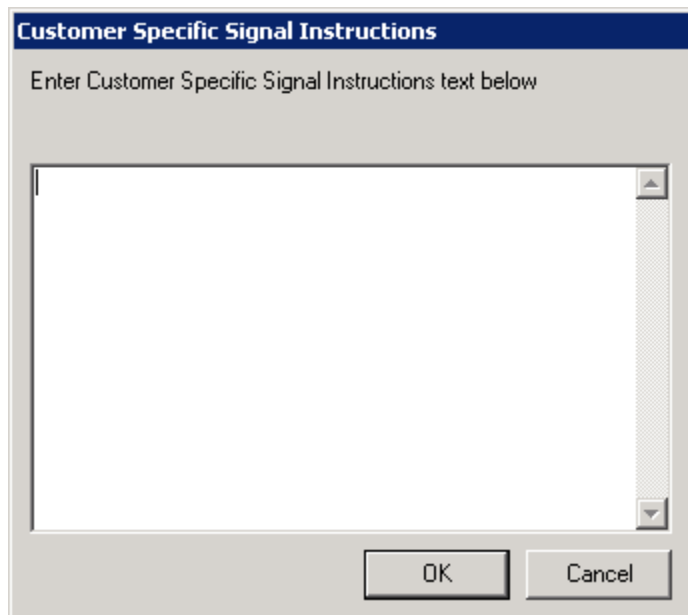
Transmitter Programming

1. Open the *Programming* form by clicking on **Programming** link in the *Access Control* list.
2. If necessary, lick on the **New** button at the top of the screen.

3. Click into the empty cell under the **TX** and select the transmitter from the drop-down menu.
4. Tab into the **DES** (Description) cell and select a description of the incoming item. For example, if this is a Burglary Verified, select BV from the list.
5. Tab into the **Area** cell and select an area from the drop-down menu, if applicable.
6. Tab into the **Zone** cell and select a zone, if applicable.
7. Tab into the **Sensor** cell and select a Sensor, if applicable.
8. Tab into the **Event** cell and select an Event from the list, if applicable.
9. Enter a brief description into the **Description** cell of the Event.
10. Enter the **Area**, **Zone** and **Sensor**, if appropriate.
11. Enter a **Point ID** (a description of the area), if appropriate.
12. Click **Save**.

### Event Actions Programming

1. Click in the **Event** cell and select an event from the drop-down list.
2. Tab into the **TX** (Transmitter) cell and select a TX from the drop-down menu.
3. In the **Area** and **Zone** cells, select an Area and Zone from the drop-down menus.
4. In the **Alarm** cell, select the appropriate response from the drop-down menu. Selecting **Yes** will sound an alarm every time the parameters are met. Selecting **No** will not sound an alarm when the parameters are met. Selecting **Default** will set the system to execute its programming based on the parameters.
5. In the **Action ID** cell, select an Action Pattern, if applicable.
6. In the **Instructions** cell, click on the ellipses button to bring up the *Customer Specific Signal Instructions* box.

A screenshot of a software dialog box titled "Customer Specific Signal Instructions". The title bar is dark blue with white text. Below the title bar, the text "Enter Customer Specific Signal Instructions text below" is displayed. The main area of the dialog box is a large, empty rectangular text input field with a vertical scrollbar on the right side. At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

7. Enter any specific instructions pertaining to the Customer. The instructions entered here will appear on the *Notes* tab of the [Alarm Handling](#) screen.
8. Click **OK**.
9. Once finished, review all items for accuracy and click **Save**.

## Asset Tracking

Asset Tracking provides individuals or an asset, such as an armored vehicle, the ability to check-in on a regular basis with the monitoring company. Check-in signals can include GPS information so that the individual or asset's movement can be plotted on a map.

## Check-in

The Check-in function allows the central station to provide a service for periodic or scheduled check-ins by an individual or asset. Check-ins can occur through a variety of ways, such as a cell phone. For example, an individual may call into the Voice Response module of the Bold MediaGateway to perform their check-in by navigating through the MediaGateway's menus and providing identifying information that satisfies certain parameters set up by the customer. When available, the cell phone may also provide GPS coordinates in order to plot the location onto a map. The MediaGateway would then submit a signal into the core Manitou system to complete the operation.

Most users will utilize the check-in functionality through the use of a schedule or on an ad-hoc basis. If using schedules, it will define the days and times the check-in service is active as well as the interval in which check-in signals are expected. On an ad-hoc basis, however, the individual will initiate contact by delivering a "Start Check-in" signal. Ad-hoc tracking still



requires a proper tracking entry for the individual or asset with an appropriate General Schedule. Manitou will continue to provide the service until a "Stop Check-in" signal is received.

## Tracking Entries

Tracking entries are added in the customer *Systems* form through the GPS system. The *Asset Tracking* form displays the customers tracking grid for the system.

Configuration						Status	
ID	Ad Hoc	Name/Description	Linked to	Schedule	Interval	Last Status	Last Location
*	<input type="checkbox"/>		<input type="checkbox"/>				

Asset Tracking form


*If a system Monitoring Type's asset tracking limit is set to zero, the asset tracking form will not display for the system. Monitoring Types are configured in the Supervisor Workstation.*

1. In the **ID** field, input the 5-digit unique identifier within the system. This ID number is defined by the user and can be any series of characters: letters, numbers or special.
2. Check the **Ad Hoc** box if check-in will occur as needed, at unplanned intervals. Please note that a general schedule is still required for ad hoc entries.
3. In the **Name/Description** field, type the individual's name or description of the asset, such as "Wells Fargo Truck."
4. The **Linked to Contact** field is a read-only field that marks whether or not the entered contact name is linked to a contact.
5. Tab over and select a **Schedule** from the drop-down menu. This field is used to add a schedule to the asset tracking in which the check-in must occur. These schedules are set up in the [General Schedules](#) form.
6. The **Interval** field sets the minutes between check-ins. This value is pre-populated off


the general schedule interval values when a general schedule is assigned to the asset. However, users can change the value for intervals if needed. Intervals may not be less than five minutes.

- **Last Status** is read-only field displays the current tracking status and are used to determine if a late-to-check-in has occurred.
- **Last Location** displays the last GPS coordinates received for an active tracking entry. The field will be cleared when the tracking status is changed to "stopped."
- The **Check-in Late** field indicates the end date and time for the current expected check-in signal window.
- The **Cycle End** field displays when the current tracking cycle will end. If the asset tracking record is not ad-hoc, users may adjust this value to end a tracking session early or to extend it later. For example, if a schedule protecting an individual ends at 17:00, the person can notify the monitoring company that they need to be monitored until 21:00.

The *Next Check-in Cycle* items allow an Operator to modify the next check-in cycle manually. Unless an Operator manually uses the *Next Check-in Cycle* items, they will be left blank.

 *Ad-hoc configurations cannot make use of the Next-Check-in Cycle options.*

- **Check-in Start** - is the start date and time for the next expected check-in signal window.
- **Check-in Late** - indicates the end date and time for the next expected check-in signal window.
- **Cycle End** - displays when the next tracking cycle will end. This allows the user to adjust the next tracking cycle if it is not ad-hoc. For example, if a schedule specifies 08:00-17:00 M-F and on Friday, the contact notifies the monitoring company that they will work from 08:00-17:00 on Saturday and need tracking, the monitoring company can make the necessary changes.

 *Users may delete tracking entries by highlighting the asset row and pressing the **Delete** button.*

## Transmitter Programming

Transmitter programming for Asset Tracking is found in the **Track ID** column. This column links each line of programming to a matching asset entry. GPS programming lines that omit the Track ID are not associated with tracking functionality, even if it is a tracking event code (or includes soft programming attributes).

Transmitter Programming

Show merged Transmitter Programming for Transmitter:

Input				Output			
	TX	DES ▲	Zone	Event	Description	Track ID	Point ID
	*	*CN	▼ *	*CH	Check-In	1	

Transmitter Programming, Track ID

## General Schedules

Manitou utilizes General Schedules as the schedule for check-in services. The schedule is created like other [General Schedules](#); however, users must select **Check-in** from the *Type* drop down menu.

**Add Schedule**

Schedule:

Description:

Type:

Description

Keyholder Availability

Programming

Check-In


Reminder

Call List Availability

General Schedules/Add Schedule, Check-in

From there, enter the appropriate schedule parameters and set the **Check-in Interval** (in minutes):

General Schedules



Schedule:

Description:

Type:  Check-In Interval:

General Schedules													
	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"/>	08:00	17:00	17:01	17:30	05/10/2009	05/10/2010

General Schedule, check-in window


The *Start1/End1* columns in the schedule establish both the start time and the window in which a check-in can occur. For example, setting a Start1/End1 combination of 09:00 and 09:10 both sets the start time at 09:00 and establishes a check-in window of 10 minutes, allowing check-ins between 09:00 and 09:10. Outside that window, check-ins will be unexpected.

Depending on the interval, the current check-in cycle's check-in window will be the previous check-in window plus the interval. Generally, the window should be smaller than the interval, otherwise the check-in and check-in late behavior will not be correct. A possible side effect of a larger window will cause the next check-in to be progressively pushed out until it hits the end of the window. If this occurs, unexpected check-ins will not occur until the check-in is pushed out as far as it can be pushed. With an interval of 60 minutes and a Start1/End1 combination of 09:00 and 09:10, a check-in occurring between 9:00 and 9:10 will cause the subsequent check-in window to start at 10:00 (not displayed in the client, though) and the check-in late to be 10:10.

The *Start 2/End 2* columns govern the window in which the final check-in will occur.

## Contact List

Please refer to the [Data Entry, Add A Customer: Contact List](#) section of this manual.

 *Removing persons from the contact list will also remove any asset tracking entries that are linked to the individual. When a user removes a tracking entry, the Manitou client removes all transmitter and event programming for that tracking ID.*

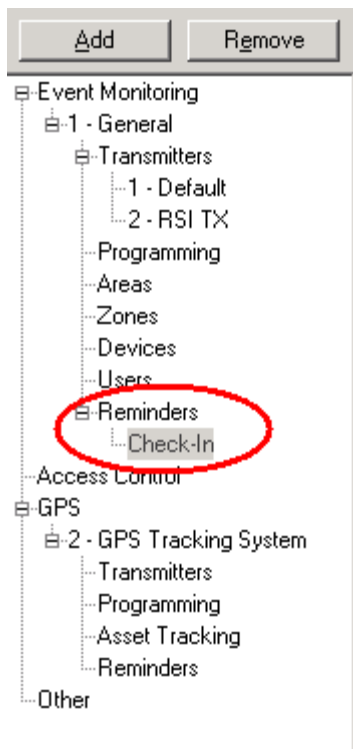
## Reminders

Reminders provide a way for a [Monitoring Company](#) to perform one-time or periodic actions/checks as a service to their customers. The Overdue Checker picks up reminders

that are due and generates an internal message to create an alarm for the reminder. Each reminder must specify a standard alarm code, which the Signal Handler uses to assign an appropriate Action Pattern.

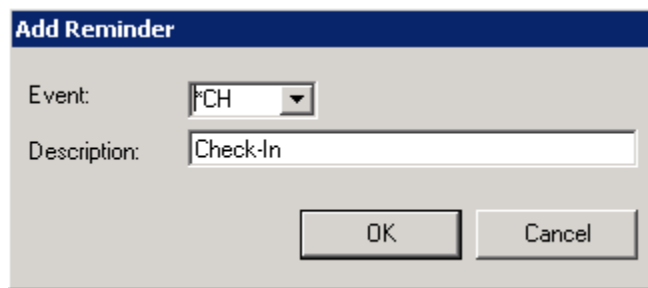
The reminder may include help text (notes) attached to the alarm for the Operator's use. Users must have a Reminder Service set up in the Monitoring Types form in order for the reminders option to perform properly.

Reminders are added through [Event Programming](#), [Access Control](#) or [GPS systems](#), and individual reminders appear underneath a reminder's parent node.



Reminders list

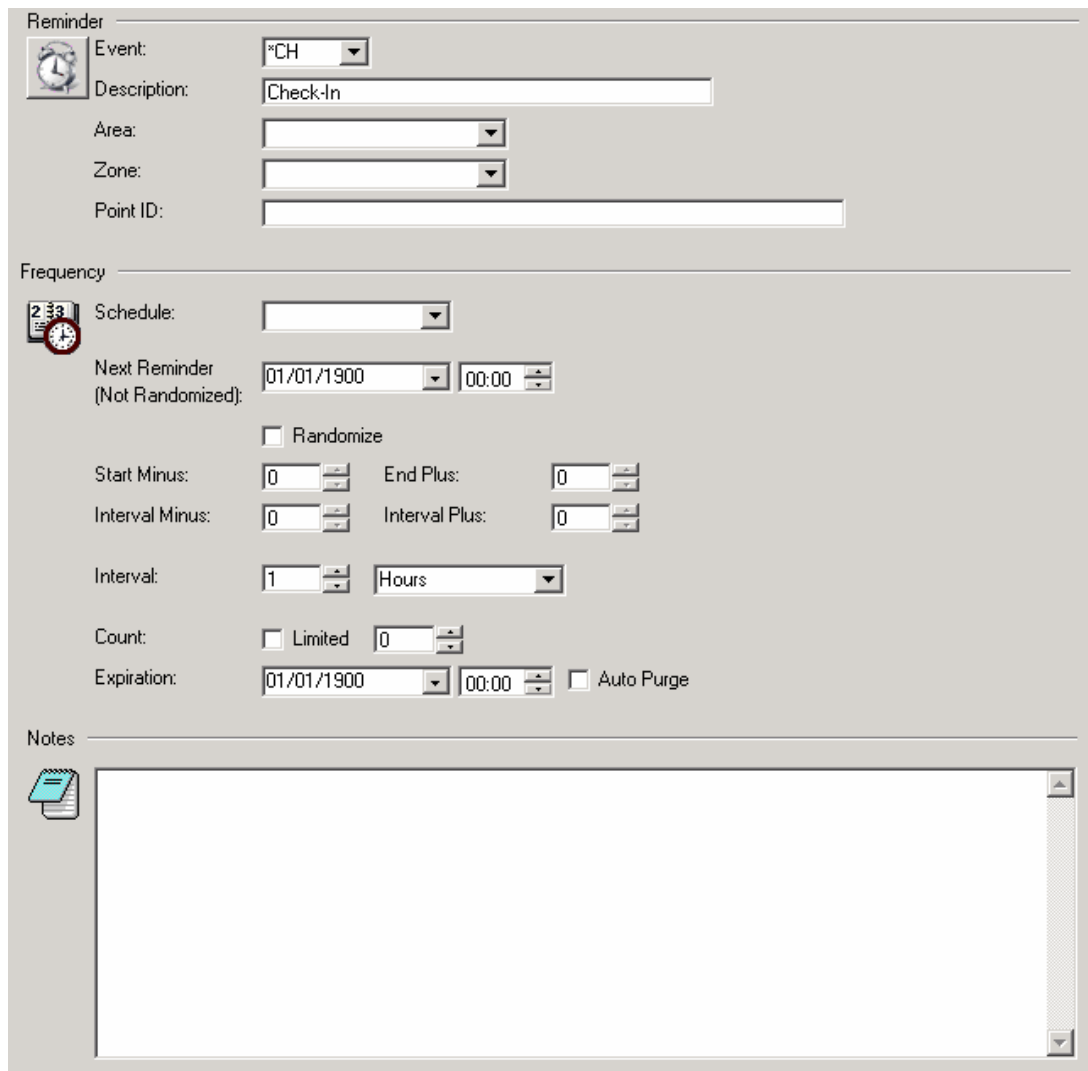
1. When adding a Reminder, select the **Event** from the Event Codes list. A pre-defined **Description** will auto-fill upon selection of the **Event**; however, it may be edited if preferred (20 character limit).
2. Click **OK** to create the Reminder.



The 'Add Reminder' dialog box has a title bar with the text 'Add Reminder'. It contains two labels: 'Event:' and 'Description:'. The 'Event:' label is next to a dropdown menu showing '°CH'. The 'Description:' label is next to a text box containing 'Check-In'. At the bottom right, there are two buttons: 'OK' and 'Cancel'.

Add Reminder dialog box

3. In the *Reminder* form, additional information may be added to the Reminder.



The 'Reminder' form is a complex window with several sections. At the top, there is a 'Reminder' section with a clock icon. It contains labels for 'Event:', 'Description:', 'Area:', 'Zone:', and 'Point ID:'. The 'Event:' dropdown shows '°CH', and 'Description:' shows 'Check-In'. Below this is a 'Frequency' section with a calendar icon. It includes a 'Schedule:' dropdown, 'Next Reminder (Not Randomized):' with date and time pickers (01/01/1900 and 00:00), a 'Randomize' checkbox, and fields for 'Start Minus:', 'End Plus:', 'Interval Minus:', and 'Interval Plus:' with spinners. The 'Interval:' section has a spinner set to '1' and a unit dropdown set to 'Hours'. The 'Count:' section has a 'Limited' checkbox and a spinner set to '0'. The 'Expiration:' section has date and time pickers (01/01/1900 and 00:00) and an 'Auto Purge' checkbox. At the bottom is a 'Notes' section with a notepad icon and a large text area.

Reminder form

- **Event** - the standard alarm event code for the generated reminder alarm, and allows event programming to assign an Action Pattern.

- **Description** - text description of the reminder.
- **Area** - the area of where the reminder is occurring. Area is used for event type systems only.
- **Zone/Asset** - apply a Zone or Asset Tracking ID to the reminder if applicable. This is dependent on system type.
- **Point ID** - the location description.
- **Schedule** - select a general schedule to attach to the reminder.
- **Next Reminder** - next date and time for the reminder alarm to occur.
- **Randomize** - randomize the intervals, which will render them unpredictable. For example, if a schedule is set to record video footage every half hour between 11 a.m. and 2 p.m., the Randomize action will set video to record at random times within the set schedule.
- **Start Minus** - number of minutes preceding the beginning of the schedule window where the first reminder will occur.
- **Interval Minus** - number of minutes preceding the next reminder within a schedule window where the reminder may occur.
- **End Plus** - number of minutes past the end of the schedule window where the last reminder may occur.
- **Interval Plus** - number of minutes past the next reminder within a schedule window where the reminder may occur.
- **Interval** - number of minutes, hours or days between reminders.
- **Count** - number of reminders to generate.
- **Expiration** - expiration date of the reminder.
- **Auto Purge** - indicates that the Overdue Checker should automatically purge the reminder when it is expired or the number of occurrences is complete.
- **Notes** - enter any helpful notes or comments. These comments will be attached to the alarm through the transmitter programming notes mechanism. Note that if the event created by the reminder matches a line of transmitter programming with notes, the transmitter programming notes will take precedence.

## General Schedules

Please refer to the [Data Entry, Asset Tracking: General Schedules](#) section.

## Other

The *Other* system is a catch-all 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, users can tie it to a monitoring service which the central station can automate billing for through accounting integration.

## New Customer Services

The *Services* window lists all Monitoring Services applicable to the Customer. These services may be Video monitoring, Alarms only, or Reports.


Services form, Add New

1. Select the **Services** form from the *Jump To* menu.
2. Click on the **Add** button to add a Service. An *Add Monitoring Service* window will appear.
3. Select a service from the drop-down list using the arrow to the right of the **Monitoring Service** field.
4. If applicable, select the **Area** from the Area drop-down list. Areas are defined in the Zones and Areas list and will need to be set up prior to adding a Service. To see how to



set up a Zone and Area, see the [Event Monitoring: Zones and Areas](#) section of this manual.

5. Click **OK**.

 *An item can be marked or unmarked as "Chargeable" based on a permissions setting in the Supervisor Workstation. Please see the Supervisor Workstation documentation for Maintenance > Setup > Permissions for further instructions on permissions settings.*

6. If this account service has a specific valid date range, click the drop-down arrow to the right of the **Start** date and select the date from the calendar. Repeat this process for the **End** date. If the end date is not known, however, this field may remain blank.

7. If this service is a fee-based service and the customer should be charged for the service, click the **Chargeable** checkbox. Enter the code within the **Charge Code** field. The central station administrator should know the charge codes.

8. Review the items for accuracy and click **Save**.

## Schedules

There are two types of schedules within the Manitou system.

- **O/C Schedules** - open and close times, including Regular, Holidays and Temporary; a customer must have a monitoring service for O/C Schedules to be active
- **General Schedules** - day-to-day schedule used when no other schedule has been set for the customer

## O/C Schedules

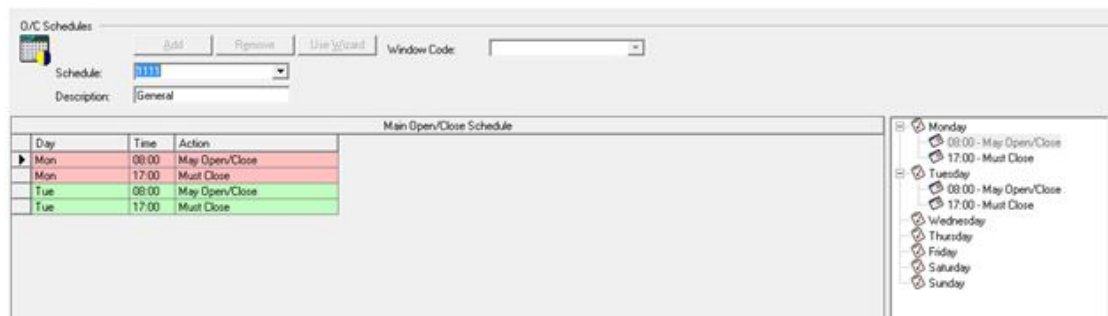
An Open/Close schedule defines the normal hours during which a site has personnel on the premises. Other schedules can be created and applied when a site's actual schedule deviates from its O/C schedule.

Perform the following steps to add an O/C schedule:

1. Open the Customer for whom you want to add an O/C schedule.
2. Select the "O/C Schedules" option from the Jump To menu as shown in the following screenshot:

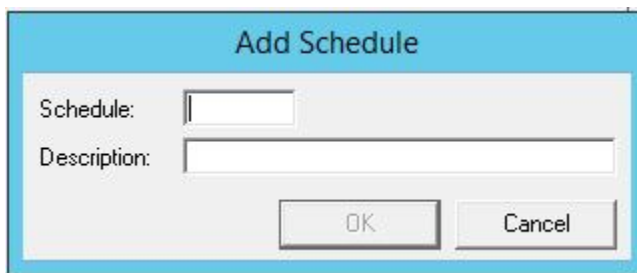


**Result:** the “O/C Schedules” form displays as shown in the following screenshot:



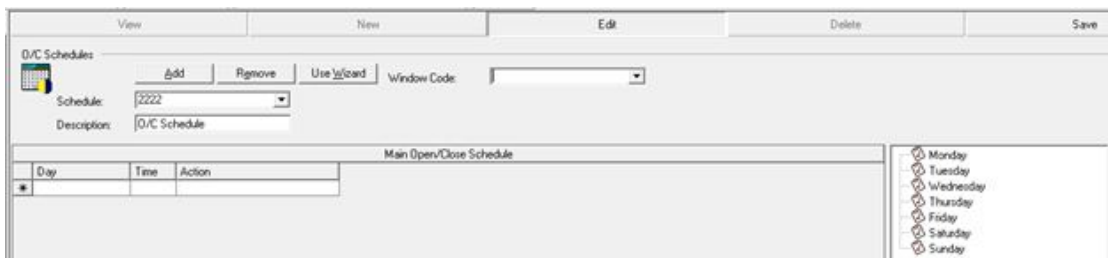
3. Click “Edit”, and then click “Add”.

**Result:** the “Add Schedule” window displays as shown in the following screenshot:



4. Enter a number into the “Schedule:” field that will allow you to later identify your O/C schedule.
5. Enter a description into the “Description:” field, and then click “OK”.

**Result:** the O/C schedule you added now displays as the selected item on the “O/C Schedules” form as shown in the following screenshot:



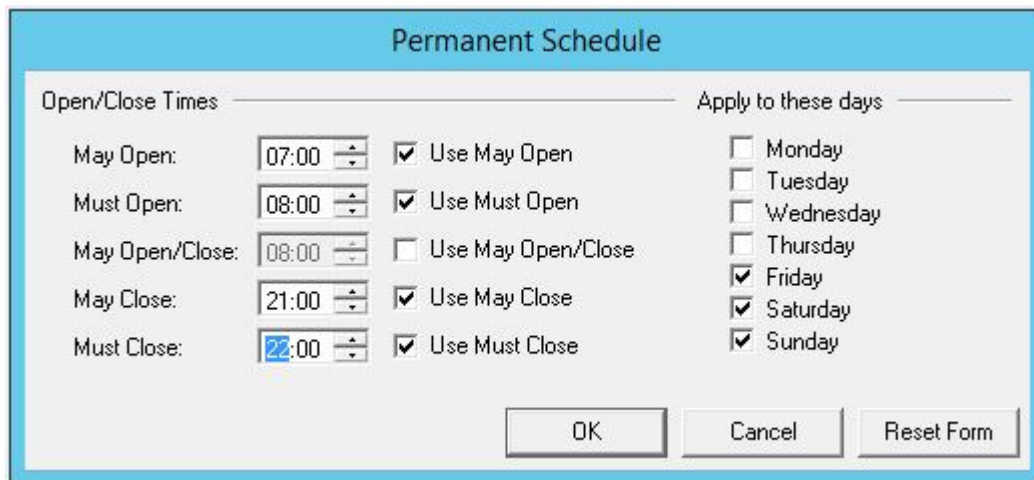
6. Click “Use Wizard”.

**Result:** the “Permanent Schedule” window displays as shown in the following screenshot:

7. Select checkboxes to indicate the days to which you want your O/C schedule to apply.
8. Select checkboxes to indicate whether you want the site to be allowed to Open/Close by a specific time, or want to require that it Open/Close by a specific time.

**Note:** the first option is called a “May Open/Close”. This means the site is permitted to Open/Close by a specific time. Because the first option is permissive, no Manitou alarm will generate if the site fails to Open/Close as scheduled. The second option is called a “Must Open/Close”. This means the site is required to Open/Close by a specific time. Because the second option creates an obligation, Manitou will generate an alarm if the site fails to Open/Close as scheduled. Because it can mean the difference between generating an alarm and business as usual, the distinction between “May Open/Close” and “Must Open/Close” is critical. Confirm that you are very clear about what the Customer wants before adding an O/C schedule for him. Normally, sites require both “Mays” and “Musts” for Open/Closes. This allows site employees a time window in which to operate.

9. In the following example O/C schedule, the site communicated to the Operator that it is only open Friday, Saturday, and Sunday. It allows employees to begin their opening process at 7am, and requires that employees open no later than 8am all three of the days it is open. For closes, the site allows its employees to begin closing by 9pm, and requires them to be closed no later than 10pm. The O/C schedule for our example site displays as follows:



**Permanent Schedule**

Open/Close Times

May Open: 07:00 ☒ Use May Open

Must Open: 08:00 ☒ Use Must Open

May Open/Close: 08:00 ☐ Use May Open/Close

May Close: 21:00 ☒ Use May Close

Must Close: 22:00 ☒ Use Must Close

Apply to these days

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☒ Friday

☒ Saturday

☒ Sunday

OK Cancel Reset Form

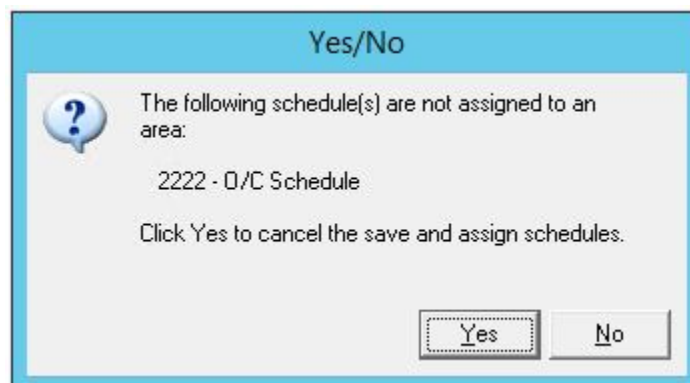
10. Once you finish creating your O/C schedule, click “OK”.

**Result:** your schedule now displays on the “O/C Schedules” form as shown in the following screenshot:


	Day	Time	Action
►	Fri	07:00	May Open
	Fri	08:00	Must Open
	Fri	21:00	May Close
	Fri	22:00	Must Close
	Sat	07:00	May Open
	Sat	08:00	Must Open
	Sat	21:00	May Close
	Sat	22:00	Must Close
	Sun	07:00	May Open
	Sun	08:00	Must Open
	Sun	21:00	May Close
	Sun	22:00	Must Close
*			

11. Click “Save”.

**Result:** the “Yes/No” dialog displays as shown in the following screenshot:



**Yes/No**

 The following schedule(s) are not assigned to an area:

2222 - O/C Schedule

Click Yes to cancel the save and assign schedules.

Yes No

12. Click **“Yes”**.

**Result:** the “Areas” form displays as shown in the following screenshot:

Area	Schedule	Description	Status
2	1111		Unknown
*			

13. Click in the “Area” field for the grid line displaying the asterisk “\*”, and enter the number of the area for which you want the O/C schedule to apply.
14. Click at the right edge of the “Schedule” column, and then click the arrow icon.

**Result:** a dropdown menu displays as shown in the following screenshot:

Schedule	Description
1111	
2222	
Sched No.	Description
All	All Access
1111	General
2222	O/C Schedule

15. Select the O/C schedule you recently added.

16. Click **“Save”**.

**Result:** the “Open/Close Schedules” window displays as shown in the following screenshot:

17. Click the arrow icon for the “Monitoring Type:” field.

**Result:** a dropdown menu displays as shown in the following screenshot:

Description	Billing Code	Service Level
Open/Close	O/C REPORTS	Monitor
Open/Close (Log)		Record
Temp open 30 mins		Monitor

18. Select the “Open/Close” option.

**Note:** do not select the “Open/Close (Log)” option. Selecting this option prevents Late-to-Open/Close Events from presenting as Manitou alarms.

**Result:** the “Customer Comment” window displays as shown in the following screenshot:


19. Enter a Customer comment, and click “OK”.

**Result:** the “Customer Comment” window closes.

## Holiday Schedule

The *Holiday Schedule* allows the entry of all observed holidays for a particular premises or business. All Holidays are entered globally through the Global Holidays form.

O/C Schedules

    Window Code:

Schedule:

Description:


Customer/System Holidays Open/Close Schedule				
	Date	Holiday	Time	Action
*	/ /			
	01/01	New Years Day		
	11/25	Thanksgiving		

Holiday Schedule form

1. Click or Tab into the **Date** cell then click the drop-down arrow to the right and select the holiday to enter.
2. Tab into the **Time** cell and enter the opening or closing time for the holiday. If the business/location is closed on the holiday enter "00:00" for midnight.
3. Tab into the **Action** field then click the drop-down arrow to select an Action from the list. If the business/location is closed on the holiday, select **No Activity**.

Customer/System Holidays Open/Close Schedule				
	Date	Holiday	Time	Action
	01/01	New Years Day		
*				<div> Open Window  Close Window  May Open  Must Open  May Close  Must Close  May Open/Close  May Open/Close Once </div>

Holiday Schedule Action menu

 If the Operator selects Open Window or Close Window the Open/Close times will

*calculate based on the Schedule Window Code selected for the account.*

4. Repeat the above steps for all holidays.
5. Click **Save**.

## Temporary Schedule

A Temporary Schedule replaces a Customer's normal Open/Close schedule with an alternative schedule. You can define the time period during which you want a Temporary Schedule to apply.

### Adding a Temporary Schedule

Perform the following steps to add a Temporary Schedule:

1. Open the Manitou Operator Workstation.
2. Open the entity for whom you want to add a Temporary Schedule.
3. Click "Operations", and then select the "Temporary Schedules" option.

**Result:** the following form displays:

Customer

Customer ID: 1973

Name: Doug Test

Schedules

Schedule: 2222

Description: O/C Schedule

Window Code:

Temporary Date: 10/21/2014

Temporary Schedule			
	Day	Time	Action
*			

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
  - 07:00 - May Open
  - 08:00 - Must Open
  - 21:00 - May Close
  - 22:00 - Must Close
- Saturday
  - 07:00 - May Open
  - 08:00 - Must Open
  - 21:00 - May Close
  - 22:00 - Must Close
- Sunday
  - 07:00 - May Open
  - 08:00 - Must Open
  - 21:00 - May Close
  - 22:00 - Must Close

4. Click the arrow icon at the right edge of "Schedule:" field.

**Result:** the schedules you already have in place display as shown in the following



screenshot:

2222	Window C
Schedule	Description
1111	General
2222	O/C Schedule

5. Select the schedule you want to temporarily replace from the dropdown menu.
6. Select the date for which you want the Temporary Schedule to apply from the "Temporary Date:" dropdown menu.

**Result:** the existing O/C schedule for the day you selected displays as shown in the following screenshot:

Customer

Customer ID: 1973

Name: Doug Test

Schedules

Schedule: 2222 Window Code:

Description: O/C Schedule Temporary Date: 10/24/2014

Temporary Schedule			
	Day	Time	Action
▶	Fri	07:00	May Open
	Fri	08:00	Must Open
	Fri	21:00	May Close
	Fri	22:00	Must Close
*			

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
  - 07:00 - May Open
  - 08:00 - Must Open
  - 21:00 - May Close
  - 22:00 - Must Close
- Saturday
  - 07:00 - May Open
  - 08:00 - Must Open
  - 21:00 - May Close
  - 22:00 - Must Close
- Sunday
  - 07:00 - May Open
  - 08:00 - Must Open
  - 21:00 - May Close
  - 22:00 - Must Close

7. Click "Edit".

For our example Temporary Schedule, the Customer wants to open by 10am, instead of the usual 8am. She is making this single-date, temporary change to perform an inventory assessment.

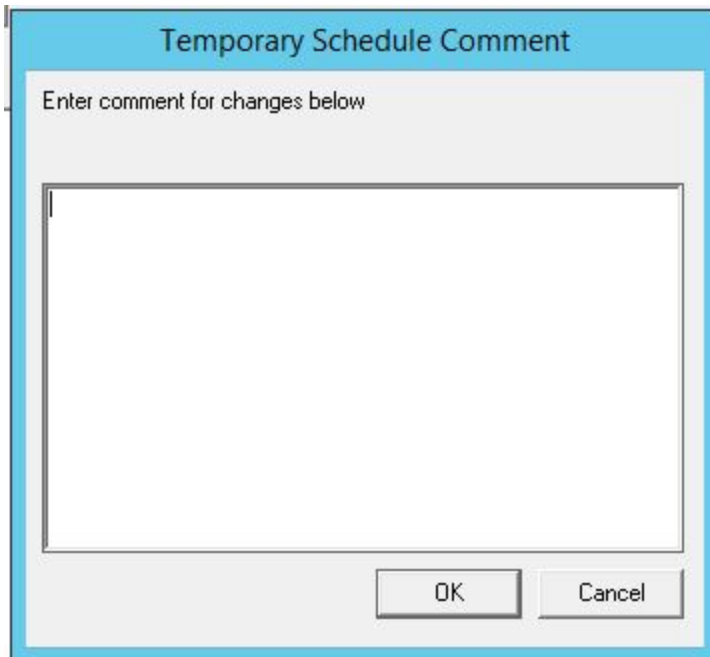
8. Select the line in the Temporary Schedule grid that relates to the change you want to make.

9. Change the "Must Open" time from 8am to 10am as shown in the following screenshot:

Temporary Schedule			
	Day	Time	Action
	Fri	07:00	May Open
	Fri	10:00	Must Open
	Fri	21:00	May Close
	Fri	22:00	Must Close
*			

10. Click "**Save**".

**Result:** the "Temporary Schedule Comment" window displays as shown in the following screenshot:



The screenshot shows a dialog box titled "Temporary Schedule Comment". Inside the dialog, there is a text prompt "Enter comment for changes below" followed by a large, empty text area for input. At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

11. Enter a comment, and then click "**OK**".

**Result:** the Temporary Schedule you added now replaces your normal O/C schedule for the date you selected. Once the date passes, your normal O/C schedule (minus the Temporary Schedule) will again go into effect.

### Extending a Temporary Schedule

The Manitou Operator Workstation allows you to extend an O/C schedule that has already generated a Late-to-Open or Late-to-Close alarm.

**Note:** this Extend Schedule functionality must be enabled in the Supervisor Workstation. Please refer to the *Manitou CS Supervisor Workstation User Guide* at the Bold Support Portal for instructions on how to enable this feature.

Once you define an O/C schedule for a site, closing it after the time set for a "Must Close" will generate a Manitou alarm.

#### Example Scenario for a Schedule Extension:

A common scenario occurs when an Operator contacts the site for a Late-to-Close alarm, and the Keyholder communicates to the Operator that everything is fine, but that she just needs some extra time to close tonight. This scenario lends itself to a demonstration of the Extend Schedule functionality.

A Late-to-Close alarm arrives in the Alarm Handling screen as shown in the following screenshot:



10/17/2014 07:38:57 ALARM (Manual) - Late-To-Close (LC) Front Door S: 1 A: 1 Z: 1 RL: 99 TXID: 8675309 Key: LC OA: 1 OZ: 1 BOLD


You contact the Customer according to the Action Pattern steps, and she tells you that the closing at the site is taking longer than expected, and that she just needs an extra hour past the designated closing time. To provide for this variance, you need to extend the existing O/C schedule.

Perform the following steps to extend an existing O/C schedule:


1. From the Alarm Handling screen, click **"Finish"**.


**Result:** the "Extend Close Schedule" window displays as shown in the following screenshot:


**Extend Close Schedule**

**Access**  Name:

☐ Can Open/Close within schedule  
☐ Can Open/Close within temp open window  
☐ Can Open/Close anytime  
☐ Can cancel Alarm  
☐ Can authorize a schedule change  
☐ Can put system On Test  
☐ Can put designated Area On Test  
☐ Can edit Customer  
☐ Can give out Customer information

**View** 

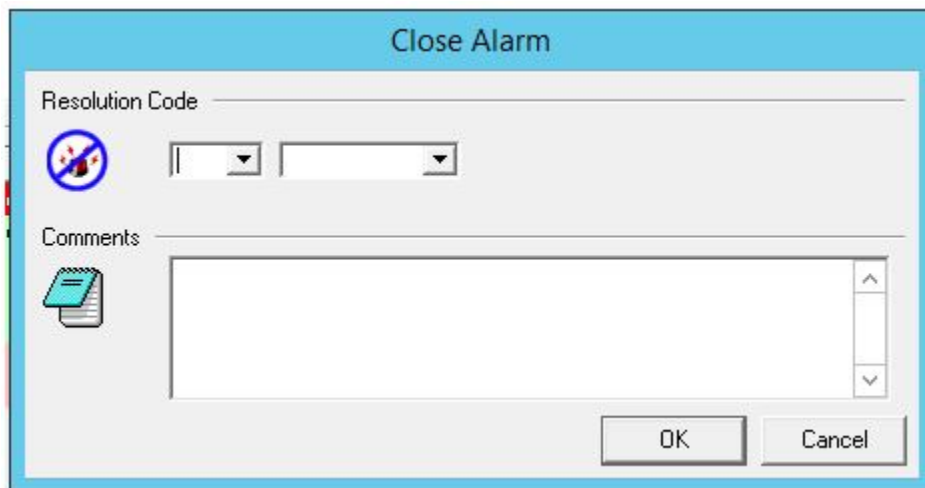
**Comments** 

**Extend Schedule**  Extend By (minutes):    
 Extend To (time):

**Note:** the “Extend Close Schedule” window only displays in this instance because the Schedule Extend functionality had been enabled in the Supervisor Workstation, and because the alarm received was for a Late-to-Close Event.

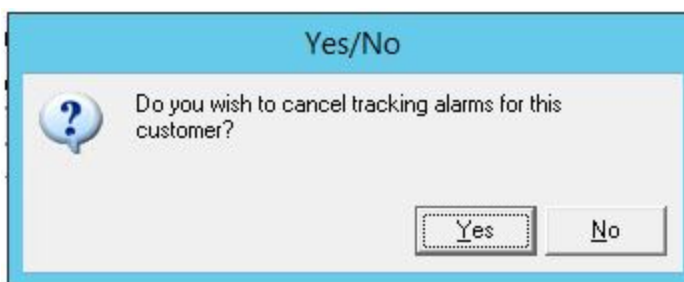
2. Click “**Validate**”, and then validate the Customer’s credentials.
3. If you want to extend the closing time by a number of minutes, enter that value into the “Extend By (minutes):” field.
4. If you want to extend the closing time so that it occurs at a set time in the future, enter that value into the “Extend To (time):” field.
5. Click “**Continue**”.

**Result:** the “Close Alarm” window displays as shown in the following screenshot:

A dialog box titled "Close Alarm" with a light blue header. It contains a "Resolution Code" section with a red prohibition icon and two dropdown menus. Below this is a "Comments" section with a notepad icon and a large text area. At the bottom right are "OK" and "Cancel" buttons.

6. Select a Resolution Code from the dropdown list, and enter any comments you want.
7. Click "OK".

**Result:** the "Close Alarm" window closes, and the "Yes/No" window displays as shown in the following screenshot:

A dialog box titled "Yes/No" with a light blue header. It contains a question mark icon and the text "Do you wish to cancel tracking alarms for this customer?". At the bottom right are "Yes" and "No" buttons.

8. If you want to cancel tracking for the Customer, click "Yes". If you want to maintain tracking, click "No".

## Window Codes

Window Codes are set up in the Supervisor Workstation and are used to add a specific amount of time to allow a schedule more flexibility. For example, a customer may wish 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.

In the example below, before and after times have been set to 15 minutes and given the description of "Plus or Minus 15 Minutes" after the code has been added to the Supervisor Workstation.

The 'Schedule Window Codes' dialog box has a 'View' tab selected. It contains a list of codes on the left, with '15 - Plus or Minus 15' highlighted. To the right, the 'Window Code' field displays '15' and the 'Description' field displays 'Plus or Minus 15'. Below these, the 'Details' section shows 'Number of minutes before' and 'Number of minutes after' both set to '15' using spinners.

Schedule Window Codes

Users can create a schedule using a Window Code in the Client Workstation. The example below uses a Window Code of five minutes (plus or minus). Using the Window Code, the generated schedule shows the may/must open and close times five minutes before or after the hour. The hours of 0800 and 1700 are defaults that pre-fill the form and can be changed if necessary while preserving the window code.

The 'Permanent Schedule' dialog box shows a 'Window Code' of 'Plus or Minus 5'. Under 'Open/Close Times', the following values are set: May Open (07:55), Must Open (08:05), May Open/Close (08:00), May Close (16:55), and Must Close (17:05). Each time has a corresponding 'Use' checkbox, all of which are checked. Under 'Apply to these days', checkboxes for Monday, Tuesday, Wednesday, Thursday, and Friday are checked, while Saturday and Sunday are unchecked.

Permanent Schedule with Window Codes

The window code can also be used without the schedule wizard. On the data entry screen, the **Plus or Minus 15** minutes window is selected. When the Day and Time have been entered and the **Open Window** option is selected for the *Action* column, the screen will appear as follows.

Day	Time	Action
Mon	08:00	May Open
Mon	08:15	Must Open
Mon	16:45	May Close
Mon	17:00	Must Close
Tue	08:00	

Window Codes, Plus or Minus

The end result is that the window has been applied to the time of plus or minus fifteen (15) minutes.

## General Schedules

The General Schedules tab contains the default schedule information for a customer. This is a customer-specific Open/Close schedule and is the default schedule the system uses when no other schedules apply for the customer record. In other words, this is the day-to-day schedule used by the customer site.

### Services

- Before beginning, an Open/Close schedule must be added in the Services form for the customer. For more information on Open/Close schedules, see [Data Entry: O/C Schedules](#).

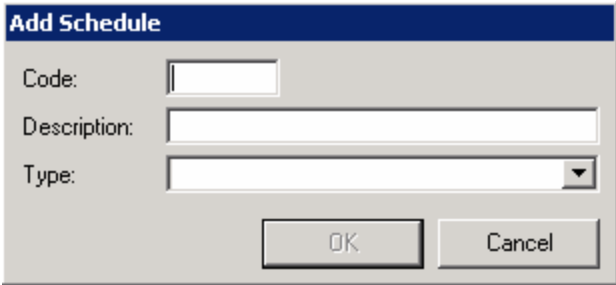
1. Select the **Services** form from the *Jump To* menu.
2. Click on the **Add** button to add a Service. An *Add Monitoring Service* window will appear.
3. Select the drop-down arrow to the right of the **Monitoring Service** field.
4. Select the **Open/Close** from the list.
5. If an Area is applicable, select the **Area** from the Area drop-down list. Areas are defined in the Zones and Areas list and will need to be set up prior to adding a Service.

To see how to set up a Zones and Area, see the [Zones and Areas](#) section of this manual.

6. Click **OK**.
7. If this service has a specific valid date range, use the drop-down menus to select the dates for **Start** and **End** times. If the end date is not known, this field may remain blank.
8. If this service is a fee-based service and the customer should be charged for the service, click the **Chargeable** checkbox.
9. Enter the Charge Code within the **Code** field. The central station administrator should know the Charge Codes.
10. Review the items for accuracy and click Save. The *General Schedules* form will now be available.

## General Schedules

1. Click on the **General Schedules** button in the *Jump To* list.
2. Click the **Add** button to bring up the Add Schedule window.



Add Schedule window

3. Enter a Schedule **Code**. This code is limited to 4 characters.
4. Enter a brief Description in the **Description** field.
5. Select the **Type** of Schedule from the drop-down menu.
6. Click **OK**.
7. Check the days of the week this schedule will apply to.
8. Click in the **Start 1** cell and enter the first open time. This number should be in 24-hour time, ie - 1pm = 13:00.
9. Tab into the **End 1** cell and enter the first close time. This number should be in 24-hour time, ie - 10pm = 22:00.



10. Repeat the above process for all additional open and close times.

11. Click **Save**.

## Contact List

Contact Lists are used to provide detailed information about Keyholders, Dealers, Agencies, Branches Authorities and Customers that relate to a particular customer account. The Contact List is divided into five main tabs and one optional tab.

- [Contact Tab](#) - default tab, displays general information regarding the Contact, such as the Type of contact (e.g. Keyholder), job title, Access, passwords, and the date the contact is valid.
- [User ID Tab](#) - provides access to many areas with the same or different panel user IDs for contacts.
- [Contact Details Tab](#) - includes all contact information (phone numbers, e-mail address and street address).
- [Notes Tab](#) - provides any special notes pertaining to that particular Contact.
- If Access Control is enabled, the [Access Cards Tab](#) will appear, providing access to many areas with the same of different panel user IDs.
- [Web Membership Tab](#) - manages BoldNet users by allowing edits of accounts associated with the Contact List.

## Contacts

Contacts are any persons that can be contacted for alarm resolution or notification. Any person with access to the site should be listed within the contact form for the customer record.

### Contacts Tab

The first step in creating a new contact is to designate whether the contact is a Keyholder or a Global Keyholder. A Keyholder is anyone with access to the customer facility.

#### Keyholder Designation

1. Select **Contacts** from the *Contact List* navigation tree on the left-hand side of the screen.
2. Click on the **Add** button located above the *Contact List* tree. An *Add Keyholder* box will appear.

**Add Keyholder**

☒ Keyholder      ☐ Global Keyholder


Name:

Country:

Language:

Time Zone:

Contact

	Site	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Home	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Business	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Mobile	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel

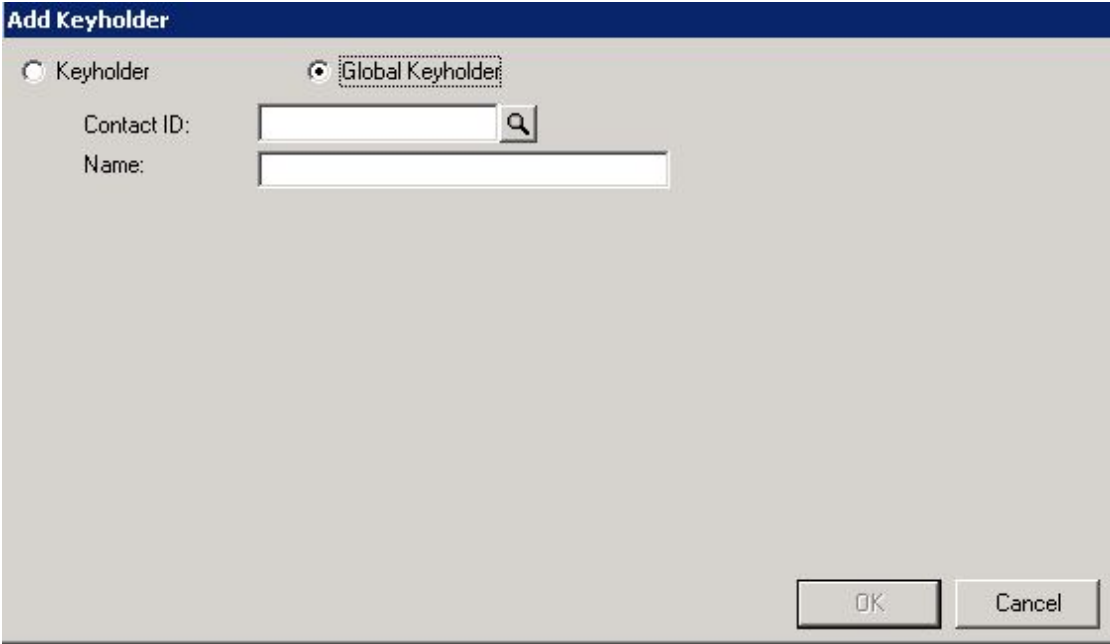
Add Keyholder Contacts form

## Keyholder

1. If the contact is a Keyholder, select **Keyholder**.
2. Enter the name of the contact into the **Name** field.
3. Select the **Country**, **Language** and **Time Zone** for the Keyholder.
4. Enter the Contact phone numbers into the appropriate fields (**Site**, **Home**, **Business** and/or **Mobile**). Click on the **Notepad** to the left of the number fields to enter any phone extensions or Scripts.
5. Click **OK**.


## Global Keyholder

1. If the Contact is a Global Keyholder, select the radio button next to **Global Keyholder** on the *Add Keyholder* form.



**Add Keyholder**

☐ Keyholder ☒ Global Keyholder


Contact ID:  

Name:

OK Cancel

Global Keyholder Contacts form


2. Enter the **Contact ID** (Customer ID) or click on the eyeglass search button to locate the correct ID number.
3. The **Name** of the Contact ID should auto-fill upon entry of the Contact ID.
4. Click **OK**.



 *If the Keyholder is Global, much of the information on the following screens will not be editable, since the Keyholder's record is already entered into Manitou.*



Once the Keyholder has been added, users will return to the main contact details form.




### Contact Details Form

**Contact**


 Contact ID:


 Name: Amy Test 

 Type: Keyholder 

 Title:   Suffix:  

Job Title:

Birthday:   ☐ Suppress

 **Access**

☐ Permissions Suspended

☐ Can Open/Close Within Schedule

☐ Can Open/Close Within Temp Open Window

☐ Can Open/Close Anytime

☒ Can Cancel Alarm

☐ Can Authorize a Schedule Change


☐ Can Put Entire Customer On Test


☐ Can Put Designated System/Areas On Test



☐ Can Edit Customer

☐ Can Give Out Customer Information




**Passwords**



 Password: PLURPLE OpenVoice ID:

Web Access ID: 1111 Max Test Time: 0 

Web Profile: Full Access  Temp Open Time: 0 


**Availability**

 Valid From:   To:  

Inactive From:   To:  

## Contact

1. If the Keyholder is addressed by a **Title** or has a **Suffix** with his/her name, use the drop-down menu to select it from the list.
2. Enter a **Job Title**, if necessary, for the Keyholder.
3. Enter a Birthday for the Keyholder if necessary.


 *For the birthday selection, the year cannot be moved below 2000 because this is technically a "birth date", meaning only the month and day.*

4. To associate a photo with this Keyholder's record, right-click within the gray portion of the picture frame to the right of the name fields to browse to and upload a photo (.jpg and .gif files only).

5. Check the **Suppress** checkbox if the contact should be prevented from showing up in the Contact List tree in the Call List, Action Pattern, alarm and report destinations forms. This field is defaulted to a checked box when the contact has no contact points.

### Access

Use the checkboxes to indicate the Keyholder's access levels. Note that there are some items that are mutually exclusive of one another. If both items are selected, an error will appear.

 *If a user's permissions are set to "Can Open/Close Any Time", the system will check their open/close against a schedule. Without a schedule, the Operator will see an "unscheduled open" signal.*

### Passwords

1. If the Customer wishes each Keyholder to have a unique password, enter it in the **Password** field.
2. If BoldNet is installed and licensed, enter a **Web Access ID** and select a **Web Profile** from the drop-down menu.

 *These fields will not appear if BoldNet is not licensed and installed.*

3. If the password is associated with a specific **Area**, select it from the drop-down menu.

### Max Test Time

By default, **Max Test Time** is grayed out. However, if a password is entered along with a VRT ID or Web ID, then the field becomes available. This is the maximum test time, in minutes, that this contact may put the account on test.


### Availability

1. Enter a **Valid From** date to indicate when this Keyholder will be a valid contact. If applicable, enter a **Valid To** date to indicate when the Keyholder will become an invalid contact.
2. If the Keyholder will be inactive during a certain date, enter the date into the **Inactive From** and **To** fields.

## User ID Tab

Contacts can be given access to many areas with the same or different panel user IDs. This information is entered in the *Details Tab* for the contact which, when data is entered, shows a grid filled with all of the event systems and areas. An entire system can be selected (with or without a panel user ID) or individual areas of the system can be selected (each with or without a panel user ID) or individual areas of the system can be selected (each with or

without a panel user id).

 *Details for a user may only be given once a system is first set up in the Systems tab. For more information on setting up a system, see the [Maintenance Menu: Systems](#) section of this manual.*

Once a system has been added, check the **Allow** box to allow the contact access to the system. A unique User ID may also be entered into the **User Id** field.



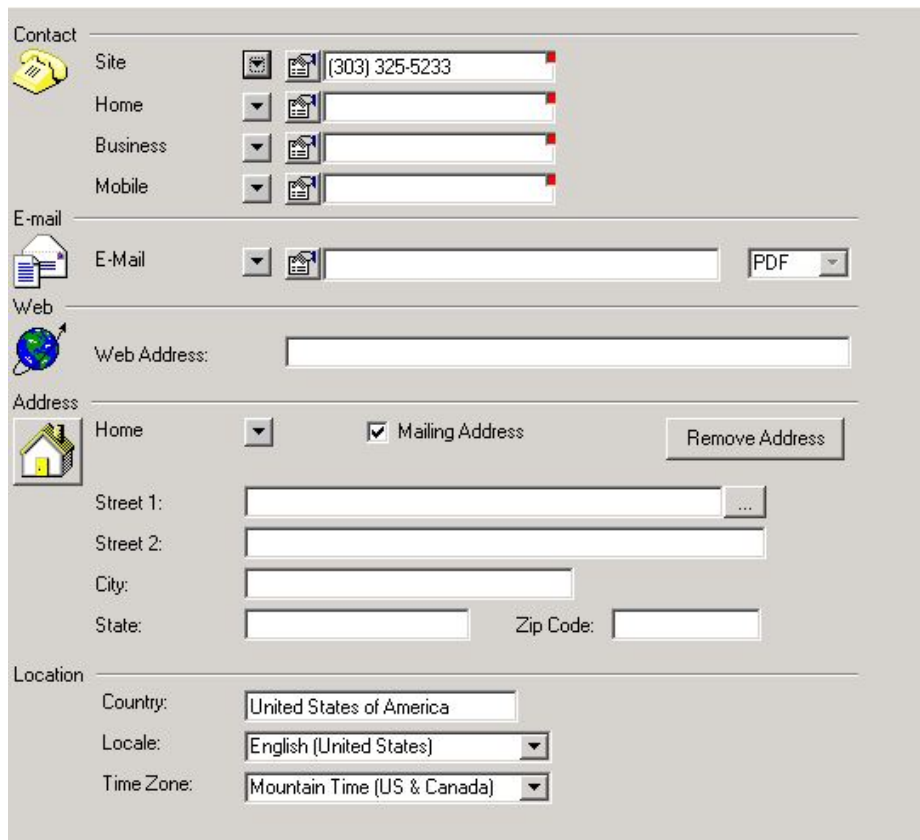
Allow	Area	Description	User Id
<input checked="" type="checkbox"/>		Burglary	12

User ID tab, Contact Details

## Contact Details

The *Details* tab of a Contact contains contact information pertaining to the account such as phone numbers, email and internet addresses, as well as authorities associated with this location. For more information on Contact and Customer details, see [Add A Customer: New Customer Details](#).

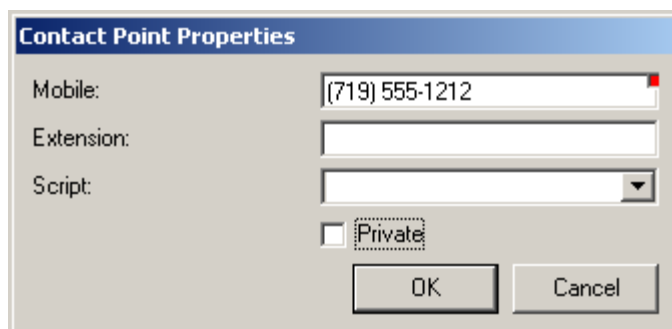
1. Click on the **House** icon (*Contact Information Tab*) to the right of the *Contacts* form to display the *Contact Information* screen.



The image shows a 'Contact Information form' with several sections: 'Contact' (Site, Home, Business, Mobile phone numbers), 'E-mail' (E-Mail address and PDF dropdown), 'Web' (Web Address), 'Address' (Home address, Mailing Address checkbox, Street 1/2, City, State, Zip Code), and 'Location' (Country, Locale, Time Zone). The 'Site' phone number is entered as (303) 325-5233. The 'Country' is set to United States of America, 'Locale' to English (United States), and 'Time Zone' to Mountain Time (US & Canada).

Contact Information form

2. Enter the **Site** phone number for the Contact. If the site phone number is not the primary number to call for this Contact, use the down arrow to the right of the number title to select the correct type for the first number to call, such as cell or business phone.
3. To enter additional details, click on the **Notepad** icon to the left of the phone number field and select **Properties** from the menu. A *Contact Point Properties* window will appear.



The image shows a 'Contact Point Properties' dialog box with fields for 'Mobile' (719) 555-1212, 'Extension', and 'Script'. There is a checkbox for 'Private' and 'OK'/'Cancel' buttons.

4. Enter an **Extension** if applicable.

5. If a script is associated with this phone number (applicable in the case of numeric PIN numbers or codes), select the **Script** from the drop-down menu. There is also the option to make this contact number **Private** by checking the box.

*✎ To protect High Profile customers, a schedule cannot be attached to a private number. A private number must be changed for a schedule to be attached. In order to edit a private phone number it must to be re-entered.*

6. Click **OK** to return to the *Details* window.
7. Enter an **E-mail** and **Web Address**, if applicable. Manitou will automatically fill in the text after the @ symbol for the Web Address if an E-mail address is previously entered. If there is no Web address, highlight the text and delete it from the text field.
8. In the *Address* portion, check the **Mailing Address** box if this address should be used for mailing purposes.
9. Click on the arrow next to the **House** button to select if the address is **Home**, **Work**, or **Mailing** then click the **House** button to enter a new address. A New Address dialog box will appear.

New Address dialog box

10. Enter the Contact's address into the address fields beginning with the **Zip Code**, using the **Search** (magnifying glass) button if needed.

*✎ Do not use punctuation or atypical abbreviations in these fields.*

11. Click **OK**. The address information on the *Contact Information* form will now be filled in with the appropriate text.
12. Confirm the information in the Location section and make any changes that may be necessary with the **Country**, **Locale**, **Time Zone**.

## Notes Tab

To enter **Notes** about this contact, click the *Note Pad* tab on the right of the Application View and enter any notes that pertain to the Keyholder.



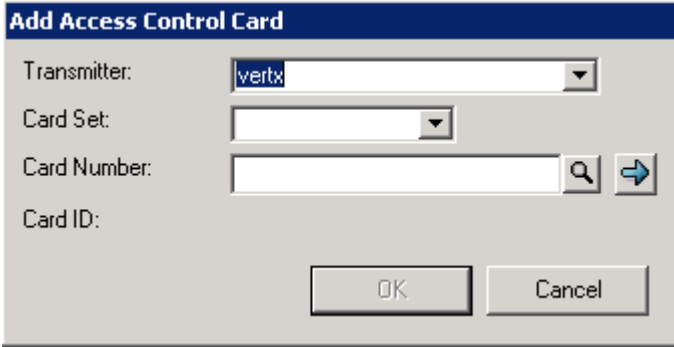
## Access Cards Tab

Contacts can be given access to many areas with the same of different panel user IDs. This is entered on the Access Cards tab in the Contact List. This tab shows a grid filled with all of the event systems and their areas.

An entire system can be selected (with or without a panel user ID) or individual areas of the system can be selected (each with or without a panel user ID) or individual areas of the system can be selected (each with or without a panel user ID). A selected area without a panel user ID gives this person On Test access to the area, assuming the user has On Test permission. An area must be selected in order to give it a panel user id. Thus, the contact will have On Test ability on any area that they have a panel user ID configured.

Access Control must first be set up in order to enable the fields in the Access Control Tab. Access Control can be set up using directions found in [New Customer Systems: Access Control](#).

1. Once Access Control has been established, return to the *Access Control* Tab on the *Contact List* form and click on the Add button to bring up the *Add Access Control Card* dialog.

A screenshot of a software dialog box titled "Add Access Control Card". The dialog has a blue header bar with the title in white. Below the header, there are four input fields: "Transmitter:" with a dropdown menu showing "vertx", "Card Set:" with an empty dropdown menu, "Card Number:" with a text input field and a magnifying glass icon, and "Card ID:" with an empty text input field. At the bottom of the dialog are two buttons: "OK" and "Cancel".

Add AC Card

2. Select the **Transmitter** and **Card Set** before indicating the **Card Number** and **Card ID**. Once these fields are entered, click **OK** to return back to the main *Access Control* Tab. The added card will now appear in the form.

Access Control Cards

Card Number	Transmitter	Card Set
▶ 1001	Testing transmitter	<None>

Card Number: 1001      Transmitter: Testing transmitter  
 Card Set: <None>      Card ID: 1001  
 Access Type: Card & PIN or Card      PIN: 0  
 Reuse time: 0      Escort Card:    
 Access Levels:

Elevator In-Sched Group: <None>  
 Elevator Out-Sched Group: <None>  
☐ Pin Cnds Allowed      ☐ Extended Access  
☐ Passback Allowed

Access Card Lookup

Raw Hex Number
----------------

Access Control Cards form

3. From here, users may enter a PIN number, Escort Card, or select Elevator groups.
- **Card ID** - This is the physical card number. The Card Number and Card ID values must match.
  - **PIN** - The PIN code associated with the card. A PIN code of "0" indicates there is no PIN code.
  - **Access Levels** - These are the access groups this card belongs to (maximum of 8) which assigns/limits access.
  - **Elevator In-Sched Group** - This is the elevator group the card belongs to when in schedule.
  - **Elevator Out-Sched Group** - This is the group the card belongs to when out of schedule, such as after hours, or only the garage and lobby floors so the person can exit the building, but no longer have access to any other floors.

- **Pin Cmds Allowed** - This indicates if the card holder is allowed to implement PIN commands.
  - **Passback Allowed** - When checked, the card is exempt from anti-passback.
  - **Extended Access** - This indicates if the extended access is on (i.e., longer grant access time for a physically challenged person).
4. The **Access Card Lookup** provides a card list of un-decoded cards (raw hex value only).

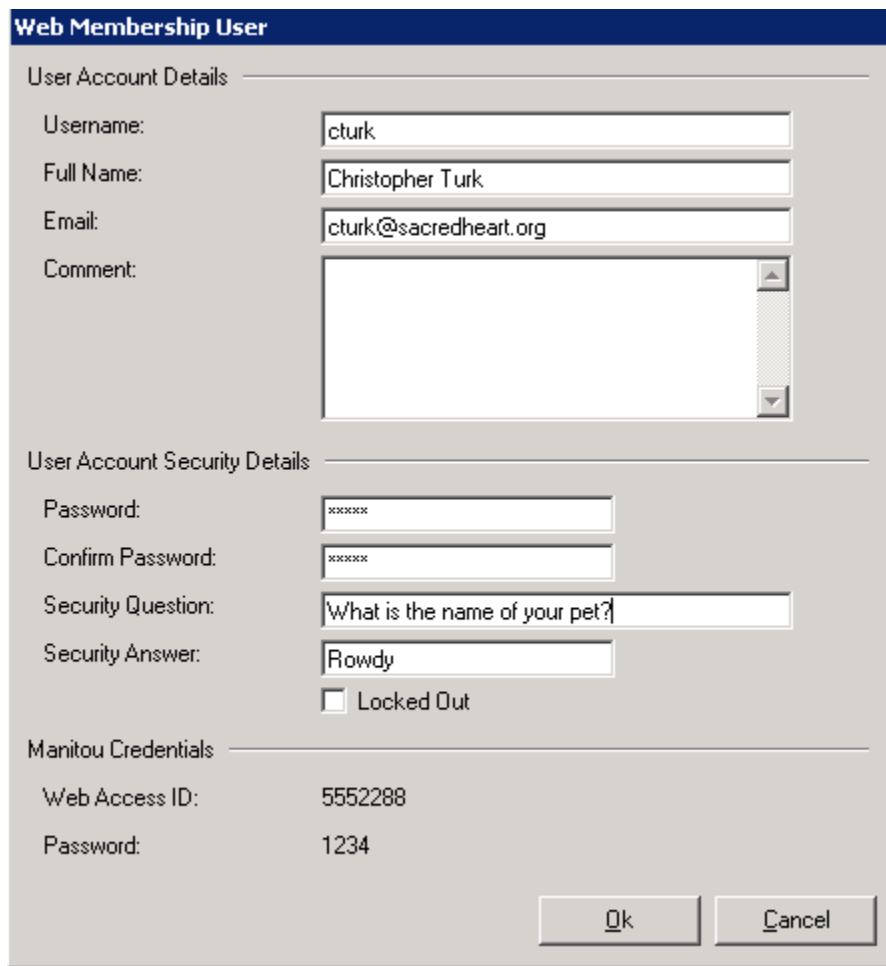
## Web Membership Tab

The *Web Membership* tab is used to manage BoldNet users by allowing addition of accounts, edits or deletion of accounts, or by temporarily locking users out of BoldNet access. All of the user accounts are associated with the Contact List person(s).

Username	Email	Full Name	Locked	Last Lockout Date	Last Login Date	Last Password	Comment
cturk	cturk@sacredheart.org	Christopher Turk	<input type="checkbox"/>		03/19/2009 17:03:06	03/19/2009 17:03:06	

Web Membership form

With the Manitou Client in **Edit** mode, click on the **Add** button to bring up the **Web Membership User** form.




The image shows a 'Web Membership User' form with three main sections: 'User Account Details', 'User Account Security Details', and 'Manitou Credentials'. The 'User Account Details' section includes fields for Username (cturk), Full Name (Christopher Turk), Email (cturk@sacredheart.org), and a large text area for Comments. The 'User Account Security Details' section includes Password and Confirm Password fields (both obscured with asterisks), a Security Question (What is the name of your pet?), a Security Answer (Rowdy), and a 'Locked Out' checkbox. The 'Manitou Credentials' section includes Web Access ID (5552288) and Password (1234). At the bottom right are 'Ok' and 'Cancel' buttons.

Web Membership User form

- Enter a username, full name and contact E-mail for the new user account.
- Any comments about the account can be entered into the **Comment** field.
- The *User Account Security Details* fields are used to log in to the BoldNet client. In the above example, the username to log in to the client will be "cturk" and a password has been entered but obscured.
- Security questions may be added in the event that the customer has forgotten their password. This question will appear in the BoldNet client when the customer clicks on the "forgot password?" link. By answering the security question with the answer given in the Manitou Web Membership form, the customer will then have their username and password sent to them to the E-mail address provided in the Web Membership User form. They will then be able to reset their password via the link given in the E-mail.

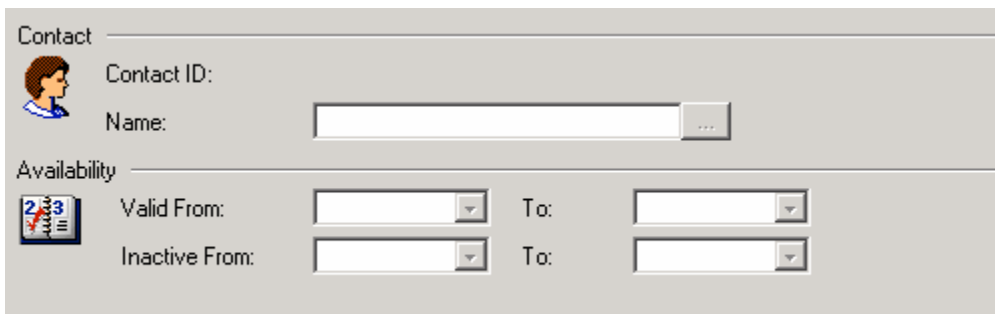
At times, a customer may need to be temporarily locked out from accessing the BoldNet client. Clicking on the **Locked Out** checkbox will perform this action. When their access is re-instated, uncheck the box to allow access back into the web Client.

The *Manitou Credentials* portion of the form displays what Manitou account (including the Web profile, which is the customer's Web permissions) the Web membership is tied to. In this example, when the customer logs into BoldNet, he will be tied to the Web Access ID of "5553388."

 For more information on BoldNet usage, please request additional documentation for the *BoldNet User's Guide*.

## Dealers

The Dealer contact list will be pre-populated based on the data entered into the [Customer Details](#) form.



Dealer Contact form

1. Enter a **Valid From** date to indicate when this Dealer will be a valid contact. If applicable, enter a **Valid To** date to indicate when the Dealer will become an invalid contact.
2. If the Dealer will be inactive during a certain date, enter the date into the **Inactive From** and **To** fields.

For more information on Dealers, see [Data Entry: Dealer](#).

## Agencies

Agencies are businesses that access secure business locations or private residences and offer some sort of service. Some examples of agencies include guarding, cleaning or janitorial companies, key services or cash transportation. It is necessary to include these companies as they pertain to the customer account.

Agencies Contact form

1. Click **Agencies** in the *Contact List* navigator.
2. Click the **Add** button to bring up the *Add Agency* screen.

Add Agency dialog box

3. Enter the **Agency Contract ID** (number) or use the search function to locate the Agency. The name of the Agency should auto-fill based off the ID entered.
4. Verify the selection is correct then click **OK** to return to the *Contact Information* screen.
5. Select the appropriate permissions from the *Access* section checkboxes.
6. In the *Passwords* section of the screen, enter a password for the Agency.
7. If the agency is only allowed access to a single specific area, use the drop-down

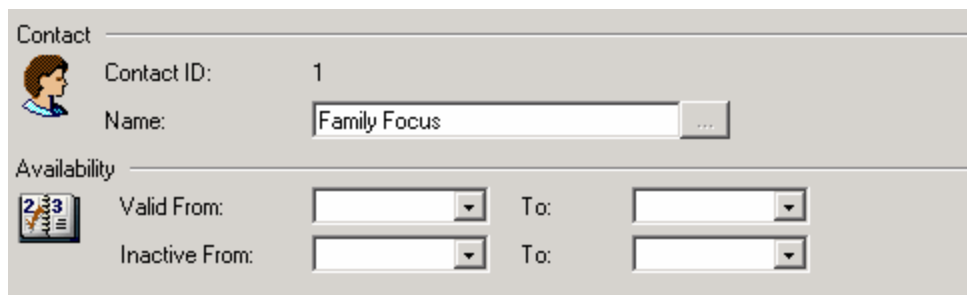
arrow to the right of the **Area** field to select the area from the list.

8. If there is a specific User Number associated with this agency, enter it into the **User No.** field.
9. Enter a temporary open time (in minutes) in the **Temp Open Time** field.
10. Set the **Valid** and **Inactive** dates by clicking the drop-down arrow to the right of the field and selecting the dates from the calendar.
11. Click the *House* tab to the right of the Application View.
12. All information should be defaulted into their applicable fields. This page is not editable.
13. Click the *Notepad* tab to the right of the Application View.
14. Enter any **Notes** about this Agency as are pertinent to this customer.
15. In the **Verification Question** field, enter a question that the Agency contact would have to answer to verify identity.
16. Tab or click into the next field and enter the **Verification Answer**.
17. Repeat the above steps for all Agencies associated with this customer account.

For more information on Agencies, see [Data Entry: Agency](#).

## Branches

The Branch contact list will be pre-populated based on the data entered into the [Customer Details](#) form.



The screenshot shows a software interface for entering contact information. It is divided into two main sections: 'Contact' and 'Availability'. The 'Contact' section includes a 'Contact ID' field with the value '1' and a 'Name' field with the value 'Family Focus'. The 'Availability' section includes four date selection fields: 'Valid From', 'Valid To', 'Inactive From', and 'Inactive To', each with a dropdown arrow for date selection.

1. Enter a **Valid From** date to indicate when this Branch will be a valid contact. If applicable, enter a **Valid To** date to indicate when the Branch will become an invalid contact.
2. If the Branch will be inactive during a certain date, enter the date into the **Inactive From** and **To** fields.

For more information on Branches, see [Data Entry: Branch](#).

## Authorities

The Authorities contact list will be pre-populated based on the data entered into the [Customer Details](#) form.

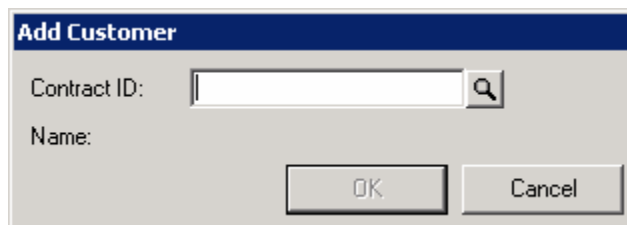
1. Enter a **Valid From** date to indicate when this Authority will be a valid contact. If applicable, enter a **Valid To** date to indicate when the Authority will become an invalid contact.
2. If the Authority will be inactive during a certain date, enter the date into the **Inactive From** and **To** fields.

For more information on Authorities, see [Data Entry: Authority](#).

## Customers

In some cases, customer accounts may be linked together as contacts for each other. Sometimes different accounts are tied together, for example, a single Keyholder may be responsible for several accounts.

1. Click **Customer** to highlight it in the *Contact List* navigator.
2. Click **Add**. An *Add Customer* box will appear.



3. Enter the **Customer Contract ID** (number) or use the search function to locate the Customer. The name of the Customer should auto-fill based off the ID entered.
4. Verify the selection is correct then click **OK** to return to the *Contact Information* screen.
5. Set the **Valid From** and **To** dates using the drop-down arrow to the right of the fields to select the dates from the calendar.



The screenshot shows a software interface with two main sections: 'Contact' and 'Availability'.  
The 'Contact' section includes a small icon of a person, 'Contact ID: 122882', and a 'Name:' field containing 'David Haiar'. Below the name field are three icons: an upward arrow, a downward arrow, and a box with 'A' and 'BC'.  
The 'Availability' section includes a calendar icon and four date selection fields: 'Valid From:', 'Valid To:', 'Inactive From:', and 'Inactive To:'. Each field has a small downward arrow icon next to it.

6. If this customer will have a period of inactivity due to office closure or vacation schedule, for example, use the drop-down arrows to the right of the **Inactive From** and **To** fields to select the dates from the calendar.
7. Click the *House* tab to the right of the Application View to view contact information for this Customer. This screen is not editable as all of the values are auto-filled from an existing Customer record. If any information needs to be edited, make those changes directly on the [Customer record](#).
8. Click the *Notepad* tab to the right of the Application View. Enter any pertinent notes about this Customer record.
9. Repeat this process for all Customer Keyholders related to this Customer account.

## Call Lists

A Call List for a Customer contains 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 may have differing shifts based on the time of day.

A Call List also provides the ability to rotate the members of a list. Rotation lists are often placed in order to ensure that one Keyholder is not the only Keyholder contacted each time an alarm occurs.

Call List

Call List:

Description:

☐ Rotation List Active

Next Rotation: [dropdown] 00:00

Interval (Days): [dropdown]

☐ Show suppressed contacts

- Contact
  - Tracie Gannaway [Keyholder]
    - Site ((303) 325-5233)
- Customer
  - Tee's Test Co
    - Site ((303) 325-5233)
    - E-Mail (tracieg@boldgroup.com)
- Dealer
  - Celebrity Monitoring
    - Site ((719) 555-3715)
- Authority
  - Colorado Springs Police Department [Police]
    - Site ((719) 555-9111)
  - Colorado Springs Fire Department [Fire]
    - Site ((719) 555-1911)
  - Colorado Springs Medical Emergency Services [Medical]
    - Site ((719) 555-1191)

> < >> <<

☐ Must Contact  
☐ Does Not Rotate

Call List form

1. Click on the **Call List** button in the *Jump To* menu.
2. Click on the **Edit** button and input the correct password.
3. Click on the **Add** button above the tree on the left-hand side of the screen. The *Add Call Lists* form will appear.

**Add Call Lists**

Call List

Name:

Description:

Type:

Member Matrix

☐ Display Contact Points

Call List Members	
Type	Contacts
▶ Keyholder	Tracie Gannaway
Dealer	CEL - Celebrity Monitoring
Authority	CSPD - Colorado Springs Police
Authority	CSFD - Colorado Springs Fire
Authority	CSMD - Colorado Springs Medical
Customer	0521 - Tee's Test Co

Add Call Lists form

4. Enter the Call List **Name** or code into the first field (4 character limit, any characters). This name or code should be determined by the central station administrator.
5. Tab into the **Description** field and enter a short description of the Call List (35 character limit).
6. Select the Type from the drop-down menu in the field. If the list is a Main Call List, select **Main**. If it is a Sub List of a Main list, select **Sub List**.
7. Click **Add to Matrix**. The Call List will be added to the Customer's account and a Main column will be added to the *Member Matrix* table.
8. Select whether to **Display Contact Points** in the Call List.
9. Click **OK**.
10. Back at the *Call List* form, select the item or items from the Contacts list that should appear in the Call List. Contacts appearing in the list should be previously added in the [Contacts form](#) of the Customer Record.
11. Move the Contacts to and from the Call List by clicking on appropriate directional arrows.
12. Move list items up and down based on priority by clicking on the up/down arrows to the right of the Call List.
13. If the Call List rotates, check the **Rotation List Active** checkbox. The contact at the top

of the list will automatically be the head of the list, indicated by an icon that appears when the Rotation List Active checkbox is checked. This contact will be first in rotation.

14. Indicate the **Next Rotation** date by selecting the correct date from the calendar. The start date defaults to the current day.
15. Set the rotation **Interval** by clicking on the up/down arrows to set the number of days each rotation is active before rotating.
16. If a Contact on the list is a **Must Contact** or **Does Not Rotate**, select the appropriate Contact and check the applicable boxes.
17. Once all data is entered, click **Save**.

## Must Contact Action

Previously, Operator cancel allowed the alarm to be closed regardless of if incomplete Must Contacts were present. Now, the Operator is warned of this, and must override to close the alarm.

Populated Call List

The Customer Option (MOPTION) for **Must Contact** still exists. If an alarm is canceled, and the above MOPTION is true, customer cancel will no longer close the alarm.



The MOPTION for Action Pattern is Optional does not affect **Must Contact** – users must still contact them. If this behavior is not wanted, then leave **Must Contact** unchecked when setting up the call list. Any action after a CLOSE command is optional (standard behavior). This is still true for Must Contact as well.

## Comments

The *Comments* area of the record allows users to view, enter, or edit temporary, current, future, and special instruction for a customer. It also offers users access to view expired comments about a customer.

 The screenshot shows the "Comments" form. On the left is a "Comment" tree with buttons "Add", "Remove", and "Refresh" at the top. The tree contains: Temporary, Expired, Current, Future, Standing, and Special Instructions. The main area is titled "Comment" and contains a "Description:" text box. Below it is a "Show On Open" section with a list of checkboxes: Alarm, Test, Pre-Cancel, Maintenance, Paged Contacts, Temporary Comments, and Temporary Schedules. To the right of this list are fields for "Auto-Client:" (set to "Ignore Comment"), "Valid From:" and "Valid To:" (both set to "00:00"), "Auto Purge" (unchecked), and "Follow Up:" (set to "00:00"). At the bottom, there is a "Comment" text box with a notepad icon, containing the text: "John is on vacation starting August 7, 2012 and will return August 15."

Comments

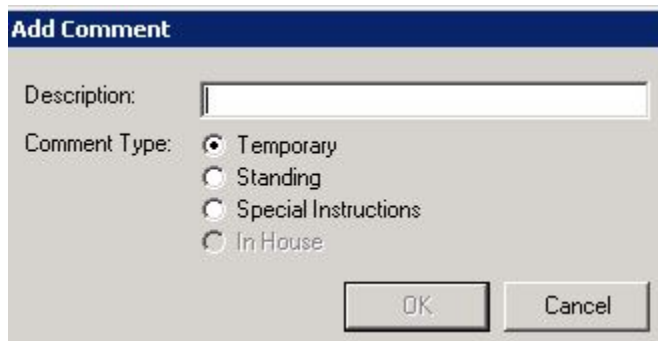
The *Comments* form is divided into four sections: Comment tree, description, alert and actual comment.

## Add Comments

Comments may be added to a Customer record to help guide or inform a user when handling an alarm or looking up a record.

### Add A Comment

1. Load the customer and select **Comments** from the *Jump To* menu.
2. Click the **Add** button. The *Add Comments* dialog box appears.

The image shows a software dialog box titled "Add Comment". It has a light gray background and a dark blue title bar. Inside the dialog, there is a text input field labeled "Description:". Below this, there is a section labeled "Comment Type:" with four radio button options: "Temporary" (which is selected), "Standing", "Special Instructions", and "In House". At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

Add Comment dialog box

3. Type a **Description** in the field and select the **Comment Type**.
  - **Temporary** - only active for a specified amount of time
  - **Standing** - active until removed
  - **Special Instructions** - special instructions or scenarios that apply to the Customer record; active until removed. Special Instructions are created within the Supervisor Workstation.
4. Click **OK**.

The screenshot shows a software window titled "Comment". At the top, there is a "Description:" label followed by a text input field containing "Testing Comment". Below this is a section labeled "Show On Open" which contains a list of checkboxes: "Alarm" (checked), "Test", "Pre-Cancel", "Maintenance", "Paged Contacts", "Temporary Comments", and "Temporary Schedules". To the right of this list are several fields: "Auto-Client:" with a dropdown menu showing "Operator Must See Alarm", "Valid From:" with date and time pickers set to "07/08/2012" and "21:28", "Valid To:" with date and time pickers set to "07/09/2012" and "21:27", an "Auto Purge" checkbox (unchecked), and "Follow Up:" with a dropdown menu and a time picker set to "00:00". At the bottom of the window, there is another "Comment" label and a large text area for entering the comment, which is currently empty.

Comment form

5. Back at the *Comment* form, select when to show the Comment in the **Show On Open** section.
6. Designate whether the **Auto-Client** should ignore the comment or require the Operator to see it.
7. For Temporary Comments, select a **Valid From** and **To** date, when to **Follow Up** and whether the system should **Auto Purge** the Comment once expired.
8. Type the **Comment** in the window provided.


## View Comments

1. Load the customer and select **Comments** from the *Jump To* menu.
2. On the left side of the screen click on the **Temporary**, **Standing**, or **Special Instructions** options within the tree menu. The tree menu will expand to display subsections of the tree menu.
3. After locating the desired comment from the tree menu click on the comment. The

comment information will display on the right side of the screen under the *Comment* area. If the comment has a valid date it will display under the title within the Comment area of the screen.

## Edit Comments

1. Select the **Edit** tab at the top of the *Comment* screen. The *Verify Password* screen will appear.
2. Verify all the information is correct, enter required password and click the **OK** button. The *Customer Comment* screen will automatically display.

 *If the customer (keyholder) does not have access to edit the account, the Verify Password screen will not allow the Operator into the Edit area of the Comment screen. Click the **Cancel** button to return to the View Comments screen if access is not allowed.*

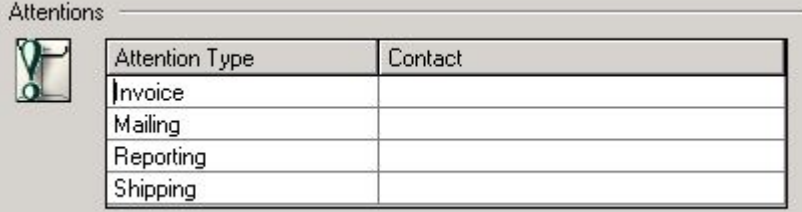
3. To edit a comment, click to highlight it the *Comment* tree on the left-hand side of the screen and make the necessary changes within the Comment form. Click **Save** when changes have been completed.

## Removing Comments

1. To remove a comment from an account, click on the comment that needs to be removed from the tree menu the comment will turn blue when it has been selected.
2. Click on the **Remove** button above the tree menu to remove the selected comment.
3. Click the Refresh button to refresh the Comment tree.

## Attentions

Attentions are used for the sole purpose of printing and mailing paper copies of reports run through Manitou. If an Attention is entered, Manitou will print that attention prior to printing out the physical address of the recipient.




Attention Type	Contact
Invoice	
Mailing	
Reporting	
Shipping	

Attentions form

1. Verify the Attentions form is in "New" mode or if making changes, click on the **Edit** button to put the screen into edit mode.



2. Click in the appropriate field.
3. Select the contact from the drop-down menu.

 For Contacts to appear, they must first be entered into the [Contact List](#).

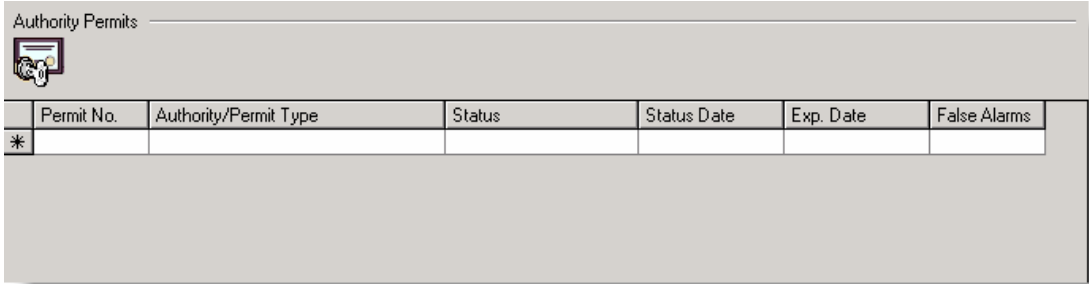
4. Click **Save**.

## Permits

The *Permits* form lists all permits held by security companies and other protective services like the Police, Fire and Medical Services. Additionally, *Permit* forms detail the types of alarm each company handles as well as the active dates and expiration dates for each Permit. Information on this form depends on the Permit Type information which should have been previously through the Supervisor Workstation.

### Adding Authority Permits

1. Click on **Permits** in the *Jump To* menu.
2. If the screen is not already in Edit mode, click on the **Edit** button. A blank Authority Permit line will appear.




Permit No.	Authority/Permit Type	Status	Status Date	Exp. Date	False Alarms
*					

Authority Permits table

3. Click in the **Permit No.** cell and enter the Permit number. The central station administrator may need to be contacted for numbering instructions.
4. Click in the cell and use the drop-down arrow to select the **Permit Type** from the list. The Permit Types should already be entered in the system.
5. Tab into the **Status** field and use the drop-down menu to select the Status from the list. The Status levels indicate the number of allowable False Alarms for the account.
  - **Unknown** indicates that the number of allowed false alarms is unknown and it is unknown if Authorities are able to respond.
  - **Normal** indicates the normal number of allowed false alarms, while May Respond indicates that Authorities may respond to the customer site.

- **May Respond** indicates that the Authorities may respond to the instance.
  - **No Response** indicates that Authorities may not respond to the customer site.
6. Tab into the **Status Date** and enter the date on which the Permit is active. Only numbers may be entered in this field and dashes (-) or slashes (/) are prohibited.
  7. Tab into the **Exp. Date** cell and enter the date on which this Permit will expire. Numbers may only be entered in this field and dashes (-) or slashes (/) are prohibited.


 *The Expiration Date may not exceed the Status Date, so a date must be entered into this field.*

8. **False Alarms**, an auto-filled column, shows how many false alarms have come in associated with that particular permit.
9. Once the information is entered correctly, click **Save**.

## Customer Finish

Once all forms are entered, click **Save**.

This saves the basic information so that the account can receive signals, display to the address where an event was tripped, dispatch the applicable authority and contact the location.

 *It is a good practice to review the data entry within the Customer Record by clicking the **View** button prior to entering additional data including Contacts, Call Lists, Open/Close Schedules and Comments.*

## Action Patterns and Enhanced Action Patterns

**Action Patterns** are a vital part of alarm handling and processing. They are a set of instructions for you to follow while handling an alarm. You configure Action Patterns based on the type of alarm, whether fire, burglary, and so on, and can be set up at various levels including:

- Global (affects all accounts and is configured at the "Monitoring Company" level)
- Dealer
- Customer

During an alarm, the Operator Workstation looks to customer-level, then dealer-level, then global-level Global Action Patterns.

**Important:**

- ManitouNEO categorizes Action Patterns added to the Monitoring Company as Global Action Patterns and therefore are available when viewing Customer and Dealer accounts. (**Note:** This guide uses Monitoring Company and Global Action Patterns synonymously.) It is important to keep this in mind when creating Global Action Patterns (since you can use them at multiple levels). For example, you might want to create Monitoring Company/Global Action Patterns that will contain actions that many Customer and Dealer accounts will use to help increase efficiency and simplicity.
- If you do not specify a specific Action Pattern for an account it will use the Global Action Pattern.
- Customer Action Patterns are the most specific.
- Temporary Contacts are contacts that have expired based on the Valid To/From date that was configured at the time of the Temporary Contact creation. These will appear highlighted in green within an Action Pattern.
- You must enable and indicate UL compliant Customers in the Manitou Supervisor Workstation. Within the Supervisor Workstation, click **Maintenance | Setup | Country**. Next, select **Country Setup** from the **Jump To** menu, and then select **UL Policy Licensed** from the **Country Options** section.

You can construct **Enhanced Action Patterns** using logic statements like “if,” “then,” and “else.” Other programming constructs like loops and variables are also available. Once initiated, Enhanced Action Patterns look at history, run SQL statements, and execute external programs.

**Note:** See [Technical Details - Enhanced Action Patterns](#) for more information.

## Categories - Action Pattern and Enhanced Action Pattern

You can group Action Patterns into Categories. As one may expect, this allows users to organize Action Patterns. This is especially helpful for sites that have a large amount of Action Patterns and for any site that wants to create a specific Action Pattern structure. Action Pattern Categories are established and configured in Supervisor Workstation 2.0.0 **Subtypes Setup**.

**Important:** You must enable and indicate UL compliant Customers in the Manitou Supervisor Workstation. Within the Supervisor Workstation, click **Maintenance | Setup | Country**. Next, select **Country Setup** from the **Jump To** menu, and then select **UL Policy Licensed** from the **Country Options** section.

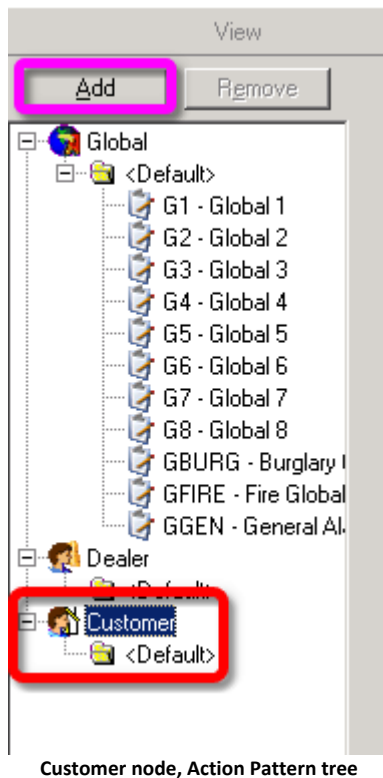
## Customer - Adding an Action Pattern

To create a new Action Pattern for an individual customer, a Customer Action Pattern will be created.

1. Open the customer whose Action Pattern you wish to edit.
2. Selection **Action Patterns** from the *Jump To* list .

On the left hand side, all available Action Patterns will appear: Global, Dealer, and the Customer whom you are currently viewing. This is helpful as it allows you to see what the various settings are for each of the Patterns, so they can be used as "templates" when creating a new Action Pattern.

3. Click the **Edit** button at the top. At the *Verify Password* screen, enter the appropriate password and click **OK**.
4. Highlight the customer node so that the **Add** button becomes available.

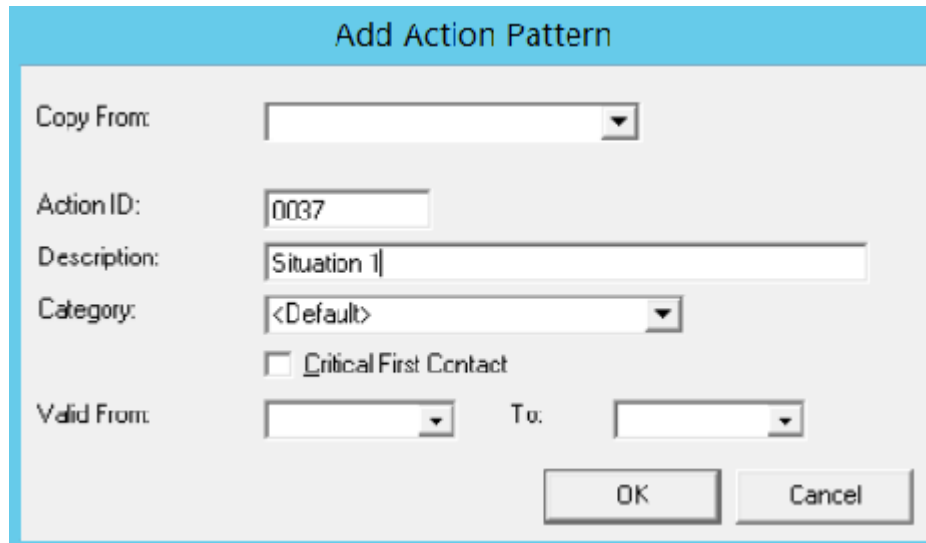


5. Click the **Add** button. An *Add Action Pattern* box will appear.

6. If you will be copying this Action Pattern from an existing one, choose it from the **Copy From** drop-down list.

7. Enter a unique **Action ID**. (An identifier for an Action Pattern tied to alarm type. Global and Dealer-level Action Patterns are available.)
8. Enter a brief Description for the Action Pattern. This is not pertinent to the functionality, but should be something that can be easily recognized by any user.
9. If available and applicable, enter a **Category**. (A group to which the Action Pattern belongs. This field might or might not be applicable. If not, leave at its default.)

10. Select an action and then select **Critical First Contact** for the first action listed in the Action Pattern that will run automatically.
11. Enter a start and end date the Action Pattern is available. If you leave these fields blank, the Action Pattern is available until deleted or disabled.

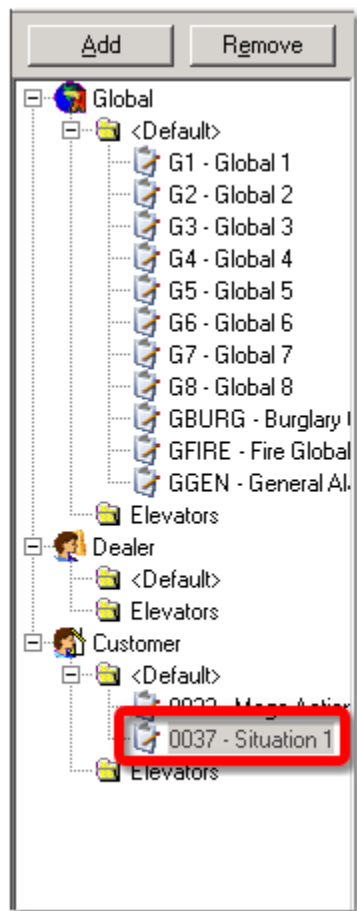


The screenshot shows a dialog box titled "Add Action Pattern". It contains the following fields and controls:

- Copy From:** A dropdown menu.
- Action ID:** A text box containing "0037".
- Description:** A text box containing "Situation 1".
- Category:** A dropdown menu showing "<Default>".
- ☐ **Critical First Contact**
- Valid From:** A date picker.
- To:** A date picker.
- OK** and **Cancel** buttons at the bottom right.

12. When ready to proceed, click **OK** and then **Save** at the top.
13. The newly-created Action Pattern should now appear in the *Action Pattern* list at the Customer level.

**Note:** See [Customizing - Action Patterns and Enhanced Action Patterns](#) for additional information.



Action Pattern list, New Action Pattern

## Customizing - Action Patterns and Enhanced Action Patterns

### Action Pattern Categories

Action Patterns are categorized by the following types:

- **Action Items** - The particular commands that make up an Action Pattern or Enhanced Action Pattern.
- **Logic Items** - SQL Logic items, If, End If, Else, Select, End Select, Case, and Otherwise.
- **Label/Marker Items** - An explicit name or number assigned within the Action Pattern. You reference it with an Enhanced Action pattern control statement appearing elsewhere in the Action Pattern.

### Customizing an Action Pattern

To customize an Action Pattern, do the following:

1. Go to the Customer, Dealer, or Monitoring Station's **Action Patterns** (from the **Jump To** list).

2. Click the Action Pattern that you want to customize from the Action Pattern tree.
3. Click **Edit**.
4. Select the **Item Type** and complete the related command options.
5. Click **Add Item** for each action item that you add.
6. Click the Up and Down Arrow keys to position the action items within the Action Pattern.
7. Once you have completed the Action Pattern, click **Save**.

**Important:** Test the Action Pattern by considering all possible scenarios before using it for actual alarms.

### General Options

The following fields span several Action Pattern categories:

- **Mask** – A Mask is a text overlay of the code instructions used to build Action Patterns. For example, you could type, “We need to count the number of NT events in the history”, and SQL code would be behind this command statement. Additionally, when using Masks, you can format action items for emphasis (that is, bold, italics, underline, and color).
- **Auto** – Select Auton if the Action Pattern should run certain events automatically during an alarm. Similar to the Auto-Client, Auto can perform simple tasks such as sending emails and closing certain types of alarms, and so on.

**Note:** You can select which individual events to run automatically and which ones not to run. Auto-Run will not attempt to run automatically every event in the Action Pattern.

- **Show Suppressed Contacts** – Select this check box to display any contacts for accounts previously blocked.
- **Hidden** – Hidden is an option which will cause the action to not show in the list of actions presented to the user. An item must first be Auto before it can be Hidden. LOG and SET are currently the only two types of actions that can be Hidden.
- **Attention** – Displays an Attention Line to you with additional information or to fulfill UL requirements.
  - **Signal Qualifier** – Signal Qualifiers are user-defined conditions that, when



met, allow the system to run the selected action item.

- **Any** – The default selection and means the Enhanced Action Pattern will run regardless of the state of the Signal Qualifier condition.
- **Yes** – The Signal Qualifier condition must exist for the Enhanced Action Pattern action to run.
- **No** – The Signal Qualifier must not exist in order for the Enhanced Action Pattern action to run.

**Important:** You must enable and indicate UL compliant Customers in the Manitou Supervisor Workstation. Within the Supervisor Workstation, click **Maintenance | Setup | Country**. Next, select **Country Setup** from the **Jump To** menu, and then select **UL Policy Licensed** from the **Country Options** section.

### Action Item Commands

- **Defer** – Returns the alarm as follows:
  - **Normal** – Returns the alarm to the alarm queue. If the alarm is the oldest highest priority alarm in the queue the alarm will return to the tracked operator.
  - **To Auto-Client (Virtual Operator)** – Works as the manual process does in the legacy system where the operator is able to send the alarm to the Virtual Operator for completion of actions that do not require human-to-human interactions.
  - **To Operator** – Returns the alarm to the alarm operator. You use this generally when Notification actions are completed and there are other actions that the Virtual Operator could do, but it is important that an operator receive and review the alarm.
- **Suspend** – Action to suspend the alarm for an allotted period of time at some point in the Action Pattern.
  - **Suspend Until** is now managed through a General Schedule. This allows the ability to have different times based on the day of the week, time of the day and even the date.
  - You have the ability to change the Priority within the **Suspend** command. You can lower the alarm priority of the alarm, after it is actioned, to ensure that the newer alarms are not overtaken by the older alarm when the suspension expires.
- **Close** – Closes the alarm if all Action Pattern commands are satisfied.
- **Escalate** – You can create a new alarm on the current, or a completely new, account as needed. The alarm can be of higher, or lower, priority, as required.

- **Contact** – Adds contacts to the Action Pattern and assumes a two-way conversation whether by telephone, SMS, IM, or other means.
- **Notify** – Notify is an outbound one-way communication where no response is expected and only works on specific Contact Points.
- **Show** – Displays the help text directly from the Event Category, Event Definition, and so on, as part of the Action Pattern. “Show” can also be a display of any floor plans, notes, and so on, that are attached to the Customer record.
- **Validate** – Validates passwords related to the alarm account. **(License Required)**
- **Report** – Sends out an alarm report which is a list of everyone who has been contacted; this is usually the last item in an Action Pattern.
- **Search** – You can enter search parameters in regards to the Customer record. **(License Required)**
- **Wait** – Delays action on an event for a period of seconds to await a response. **(License Required)**
- **Include** – Adds another Action Pattern into an existing one (an Enhanced Action Pattern) based on qualifying conditions such as schedules, GPS alarm, recently On-Test, and so on.
- **Jump To** – Jumps to Labels in Action Patterns, for example, attempt to reach a Customer until contact is made. **(Licensed Required)**

**Notes:**

- Some of the commands you add might require additional Programming. For example, the **Jump To** command requires you to define which Enhanced Action Pattern action you want to jump to when you reach that point in the Enhanced Action Pattern.
- If you want to log everything that you entered during the Enhanced Action Pattern, insert either of the following two commands into your Enhanced Action Pattern:
  - **Insert Collected Script Buffer into Activity Log** – Records into the Activity Log anything that precedes this command.
  - **Insert Collected Script Buffer into Maintenance List** – Records into the Maintenance List anything that precedes this command.

- **Launch** – The Launch action initiates access to external data or applications. You can configure user-defined applications in the Manitou Supervisor Workstation which are available as an action Launch type. The three built-in types are URL (Web browser link), Validate P/W module, and Customer Search module. **(License required for all options)**
- **Show** – Displays the help text directly from the Event Category, Event Definition, and so on, as part of the Action Pattern. “Show” can also be a display of any floor plans, notes, and so on, that are attached to the Customer record.
- **Prompt** – You use Prompts to acknowledge an action or do a variety of things on a Customer record driven by “If-Then” statements. Additionally, you can use for script variables here. And, Prompts can affect a Mask.
- **Set** – The new Set command allows the ability to “set” a value to a variable for comparisons that can be then tested to be greater than, less than, or equal to a value. **(Licensed Required)**
- **Remark** – Pop-ups that are either reminders or questions to ask when speaking with a contact.
- **Log Line** – The Log Line allows the ability to insert items from the Prompts (variables) into the alarm activity. You can run this automatically to prevent any operator failure to include this information in the alarm processing.
- **Send** – This command relates to the Reverse Commands used to communicate with systems that can receive commands through Manitou. Each system that can receive these commands are configured individually and are enabled when licensed and configured.
- **Connect** – This command Connects to cameras and other devices based on device and zone triggered and is based on configuration and licensing.

### Logic Items

All Logic handling requires a license.

- **If** – An element of an “If-Then-Else” conditional statement. If a condition evaluates to “True,” then only those actions that are “True” are completed. If a condition evaluates to “Else,” only those that are “False” are completed. The “Then” is implied.
- **Else** – An element of an “If-Then-Else” conditional statement. If a condition evaluates to “True,” then only those actions that are “True” are completed. If a condition evaluates to “Else,” only those that are “False” are completed. The “Then” is implied.
- **End If** – This statement ends an “If” command and control returns after the “End If” command.

- **Select** – You use the Select command to identify one or more conditions and an associated group of commands to process when that condition is “True.”
- **Case** – The Case option allows the ability to enhance the query of the Manitou database by building case statements where the true statements provide specific results.
- **Otherwise** – The Otherwise statement is used in the Case statements for items that do not fall within the case.
- **End Select** – This statements ends a “Select” command and control returns after the “End Select” command.

**Note:** See [Technical Details - Enhanced Action Patterns](#) for more information.

### Label/Marker Items

As stated earlier in this topic, this is an explicit name or number assigned within the Action Pattern. You reference it with an Enhanced Action pattern control statement appearing elsewhere in the Action Pattern.

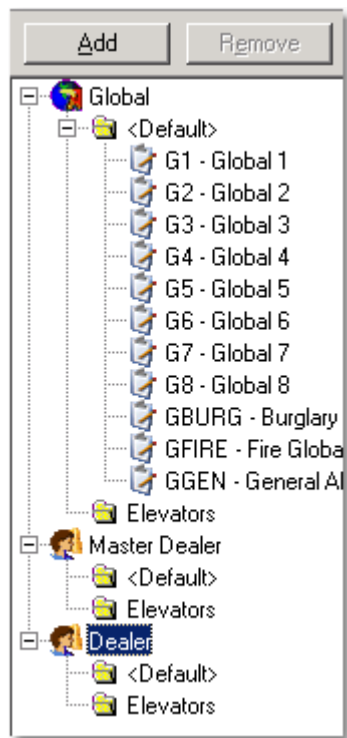
## Dealer - Adding an Action Pattern

To create a new Action Pattern for a dealer, a Dealer Action Pattern will be created.

1. Open the customer whose Action Pattern you wish to edit.
2. Selection **Action Patterns** from the *Jump To* list .

On the left hand side, all available Action Patterns will appear: Global, Dealer, and the Customer whom you are currently viewing. This is helpful as it allows you to see what the various settings are for each of the Patterns, so they can be used as "templates" when creating a new Action Pattern.

3. Click the **Edit** button at the top. At the *Verify Password* screen, enter the appropriate password and click **OK**.
4. Highlight the dealer node so that the **Add** button becomes available.



5. Click the **Add** button. An *Add Action Pattern* box will appear.

6. If you will be copying this Action Pattern from an existing one, choose it from the **Copy From** drop-down list.

**Add Action Pattern**

Copy From:

Action ID:

Description:

Category:

Valid From:

**Action Pattern**

**Customer Action Patterns**

<Default>

G2P - G2PERS

1. Fire

2. Medical

3. Panic

4. Burg

5. Fire Trouble/Supervisory

6. General Alarms

99. Library

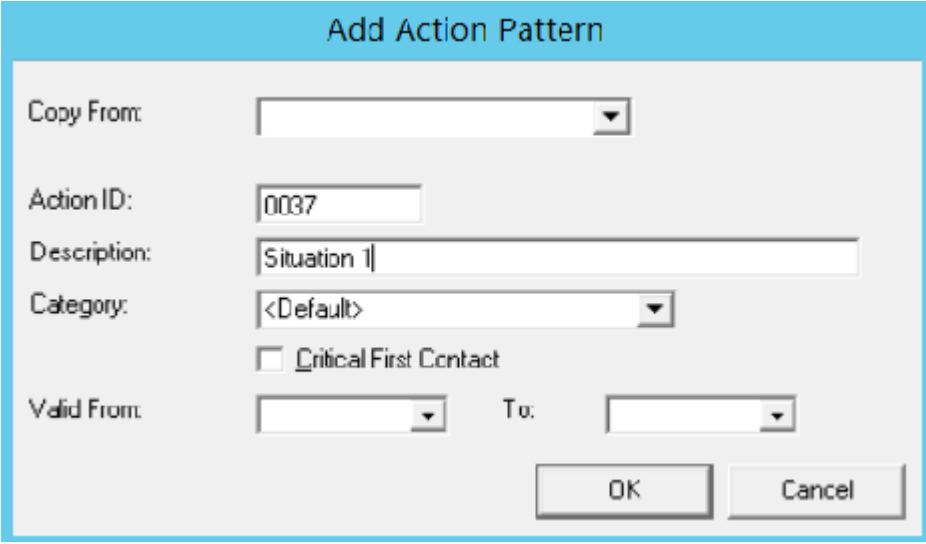
WF: <Default>

**Dealer Action Patterns**

<Default>

1. Fire

7. Enter a unique **Action ID**. (An identifier for an Action Pattern tied to alarm type. Global and Dealer-level Action Patterns are available.)
8. Enter a brief Description for the Action Pattern. This is not pertinent to the functionality, but should be something that can be easily recognized by any user.
9. If available and applicable, enter a **Category**. (A group to which the Action Pattern belongs. This field might or might not be applicable. If not, leave at its default.)
10. Select an action and then select **Critical First Contact** for the first action listed in the Action Pattern that will run automatically.
11. Enter a start and end date the Action Pattern is available. If you leave these fields blank, the Action Pattern is available until deleted or disabled.

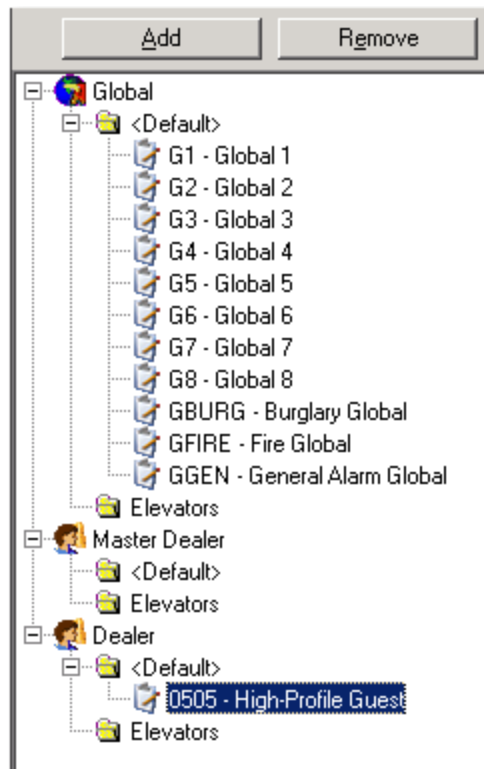


The "Add Action Pattern" dialog box contains the following fields and controls:

- Copy From:** A dropdown menu.
- Action ID:** A text box containing "0037".
- Description:** A text box containing "Situation 1".
- Category:** A dropdown menu showing "<Default>".
- ☐ **Critical First Contact**
- Valid From:** A date/time picker.
- To:** A date/time picker.
- OK** and **Cancel** buttons.

12. When ready to proceed, click **OK** and then **Save** at the top.
13. The newly-created Action Pattern should now appear in the *Action Pattern* list at the Dealer level.

**Note:** See [Customizing - Action Patterns and Enhanced Action Patterns](#) for additional information.



Action Pattern list, New Action Pattern

## Enhanced Action Patterns

The Enhanced Action Patterns feature offers decision-tree functionality, and allows you to link Action Patterns together. Because Enhanced Action Patterns offer decision points, they allow you to implement dynamic and incident-specific actions. Finally, Enhanced Action Patterns provide you with a means of collecting data and logging information along the path to closing an incident.

You must plan out Enhanced Action Patterns. Prior to designing a new Enhanced Action Pattern, Bold Technologies recommends taking the following steps:

- Identify the Customer, Dealer, or Global alarm needs.
- Plan the Enhanced Action Pattern steps.
- Script out the Enhanced Action Pattern plan.
- Test the Enhanced Action Pattern by considering all possible scenarios.

You can designate Enhanced Action Patterns and the associated components at the Monitoring Company, Dealer, or Customer level with one superseding the other. An Enhanced Action Pattern set up on the Dealer level overrides any Enhanced Action Pattern set up for the Monitoring Company for any alarm associated with that particular Dealer. An Enhanced Action Pattern set up on the Customer level overrides any Enhanced Action Patterns set up for the Dealer or Monitoring Company in regards to any alarm associated with that particular Customer.

**Note:** See [Technical Details - Enhanced Action Patterns](#) for more information.

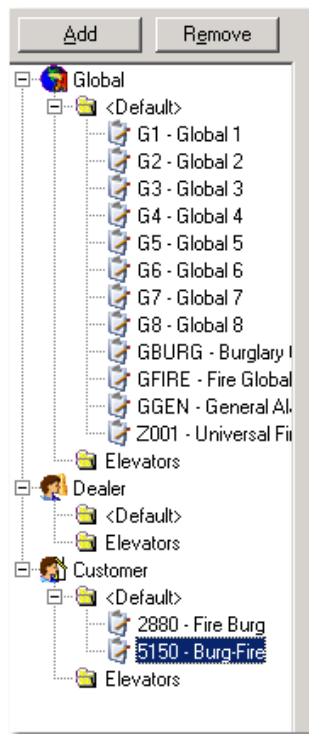
## Escalate Command

Escalate commands are used to escalate current alarms to either a different type of alarm or to a higher status alarm. The Escalate command can also close out the current alarm once the escalation has been processed.

### Creating an Escalate Command

1. To create an Escalate command within an Action Pattern, open a customer (in Operator Workstation) and choose **Action Patterns** from the **Jump To** pane (on the right hand side of the account screen).
2. Go into Edit mode by clicking the **Edit** button at the top.
3. Locate the Action Pattern to add an Escalate command to; click to highlight.





Action Pattern tree

4. From the Action Patterns *Command* drop-down menu, choose **Escalate**.



Action Patterns Command menu

5. The *Escalate Command* configuration screen will then appear.

Escalate Command screen

6. Under the *New Customer* field, you will find three (3) options. Select the options that apply to this Escalate Command.

New Customer field options

- Use Alarm Customer sets the Escalate command to apply to the current account.
- Allow Modifications during Alarm Handling allows users to escalate the alarm to a different account (when this is selected a box next to it becomes available, allowing users to specify an account to which the Operator can escalate).
- Use Specified Customer allows users to set a different account for the *escalation*.

The following table details other fields and options that may be used at the time of the Escalate command.

Field/Option	Function
New Event Code	Specifies a new event code
New Monitoring Group	Sends current incident to another monitoring group (an after-hours monitoring group, etc.)
New Transmitter	Emulate a certain transmitter information or gather information from an alternate one (an audio or video transmitter, etc.)
Force Close Original Alarm	(checkbox) Close current incident when Escalate is issued
Resolution Code	Contains all of the possible resolution codes to associate with the Force-close option in the Escalate command
Allow Change at Alarm Time	When checked, this allows Operators to change that field (corresponding to the checkbox) during an incident.

## Global - Adding an Action Pattern

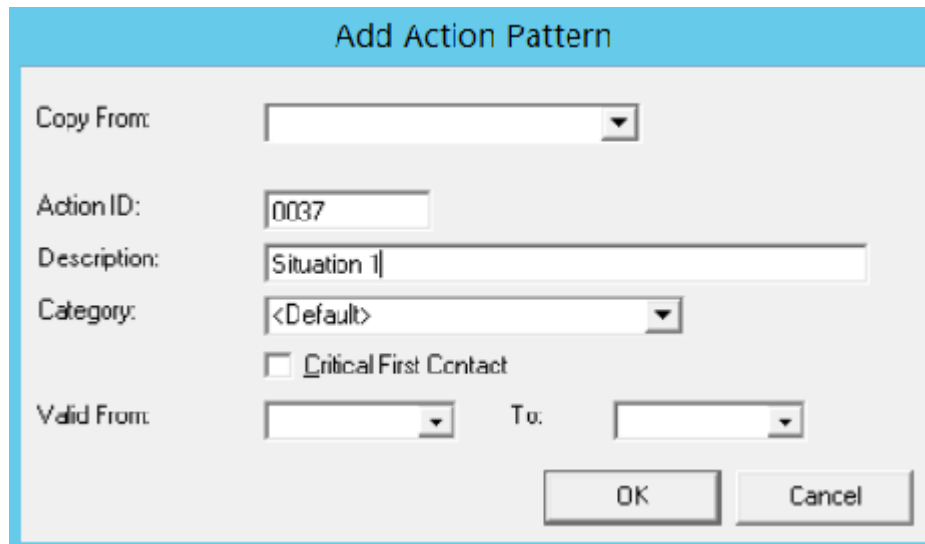
Global Action Patterns are created and managed at the Monitoring Company level. They apply to all dealers and customer accounts that do not have Action Patterns specifically assigned. To create a **Global** Action Pattern, perform the following actions.

1. Open the Monitoring Company (**Maintenance** menu > **Monitoring Company** or click the **Monitoring Company** button on the toolbar). Click the **Edit** button at the top of the screen.
2. Select **Action Patterns** from the *Jump To* menu and Click **Add**. An **Add Action Pattern** box will appear.

3. If you will be copying this Action Pattern from an existing one, choose it from the **Copy From** drop-down list.

4. Enter a unique **Action ID**. (An identifier for an Action Pattern tied to alarm type. Global and Dealer-level Action Patterns are available.)
5. Enter a brief Description for the Action Pattern. This is not pertinent to the functionality, but should be something that can be easily recognized by any user.
6. If available and applicable, enter a **Category**. (A group to which the Action Pattern belongs. This field might or might not be applicable. If not, leave at its default.)
7. Select an action and then select **Critical First Contact** for the first action listed in the Action Pattern that will run automatically.
8. Enter a start and end date the Action Pattern is available. If you leave these fields

blank, the Action Pattern is available until deleted or disabled.

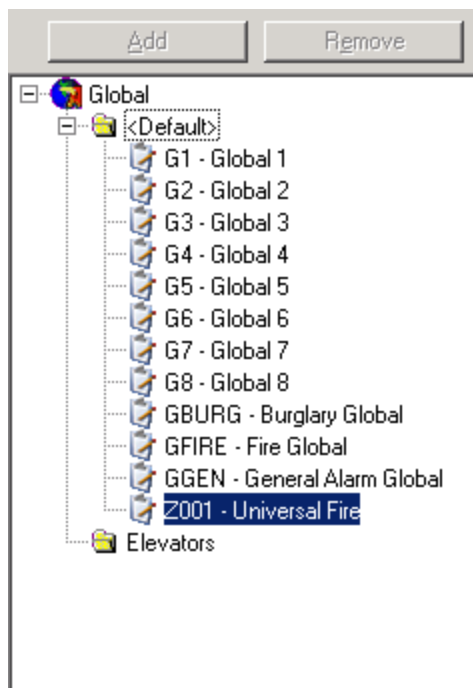


The "Add Action Pattern" dialog box contains the following fields and controls:

- Copy From:** A dropdown menu.
- Action ID:** A text box containing "0037".
- Description:** A text box containing "Situation 1".
- Category:** A dropdown menu showing "<Default>".
- ☐ **Critical First Contact**
- Valid From:** A date/time picker.
- To:** A date/time picker.
- OK** and **Cancel** buttons.

9. When ready to proceed, click **OK** and then **Save** at the top.
10. The newly-created Action Pattern should now appear in the *Action Pattern* list at the Global level.

**Note:** See [Customizing - Action Patterns and Enhanced Action Patterns](#) for additional information.



Action Pattern list, New Action Pattern

## Grouping Action Patterns

You can group Action Patterns into Categories. As one might expect, this allows you to organize Action Patterns. This is especially helpful for sites that have a large amount of Action Patterns and for any site that wants to create a specific Action Pattern structure. Action Pattern Categories are established and configured in the Manitou Supervisor Workstation **Subtypes** Setup.

## Include Command

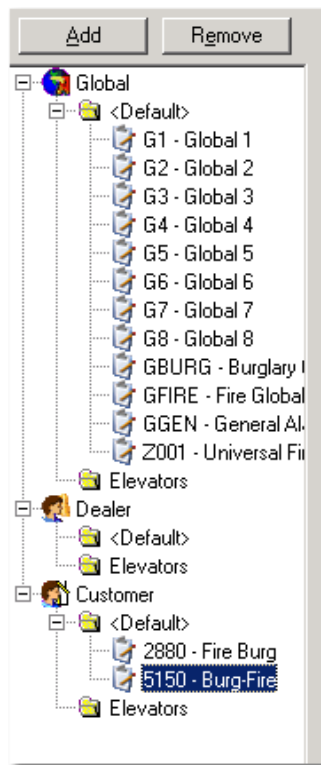
The Include command allows Action Patterns to be bundled within an Enhanced Action Pattern.

### ☛ Things to consider when using the Include command:

- Users will not be able to use the Include command if the *included* Action Pattern contains any programming that points back to the original (root) Action Pattern.
- Any Action Pattern that is included more than once will only appear once.
- Due to the nature of the Include, multiple close actions may appear. **We recommend** that users configure their Action Patterns so only one close can occur at a given time.

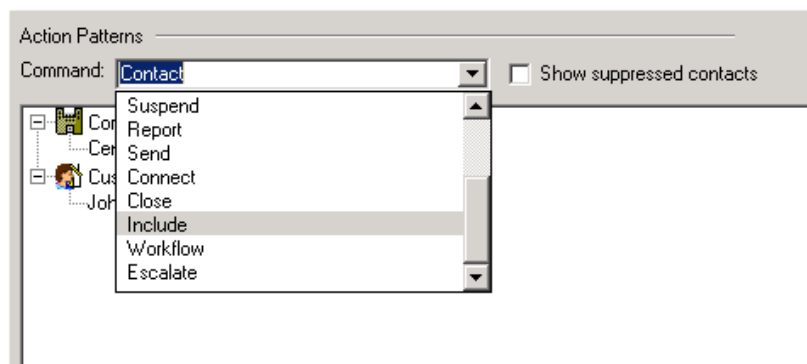
## Creating an Include Command

1. To create an Include command within an Action Pattern, open a customer (in Operator Workstation) and choose **Action Patterns** from the **Jump To** pane (on the right hand side of the account screen).
2. Go into Edit mode by clicking the **Edit** button at the top. Find and select the Action Pattern you want to add an Include command to.



Action Pattern tree

- From the Action Patterns Command drop-down menu, choose **Include**.



Action Patterns Command, Include

- The *Include Command* configuration screen then displays.
- From here, select any available Action Pattern. In the screenshot above, this could be any of the Action Patterns such as GBURG, GFIRE, GTEST, etc.
- When you have found the Action Pattern you want to include, highlight it and click the **Add Command** button at the bottom left of the *Include Command* screen.
- When you are finished click the **Save** button on top (or **Cancel** to cancel the changes you made).


## Creating Qualifiers

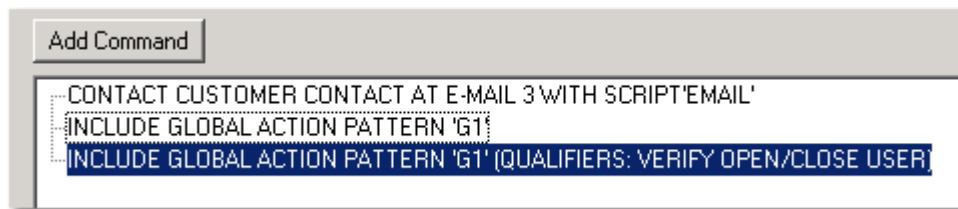
If needed, you can create 'qualifiers' for the Include command. Qualifiers flag the incoming signal to meet certain conditions before running the Include command.

1. To create a qualifier, locate the appropriate conditions in the *Signal Qualifier ...* pane on the right-hand side of the *Include Command* screen.

To enable a qualifier, change the Status column from **Any** to either **Yes** or **No**. Following is an explanation of how these qualifiers work.

- The qualifier's default setting **Any** means that the Include will run regardless of the qualifier's value.
- Selecting **Yes** or **No** requires the incoming signal to meet that qualifier condition in order to trigger the Include.

 *When the option of a field is changed and then added to an existing Action Pattern, it will show up with a brief qualifier description (in parenthesis).*



Action Pattern, options changed

2. When you are finished click the **Save** button on top (or **Cancel** to cancel the changes you made).

## Licensing Requirements

There are two licenses available:

- **Action Pattern Plus** – Used to enter post-processing Action Patterns.
- **Enhanced Action Patterns**, which includes the following commands:
  - **Wait** – Delays action on an event for a period of seconds to await a response.
  - **Set** – Allows the ability to set a value to a variable for comparisons that the command can test to be greater than, less than, or equal to a value.
  - **Jump To** – Jumps to Labels in Action Patterns, for example, attempt to reach a Customer until you make contact.
  - **Send** – This command relates to the Reverse Commands used to communicate



with systems that can receive commands through Manitou. You configure individually each system that can receive these commands and they are enabled when licensed and configured.

- **Connect** – This command connects to cameras and other devices based on device and zone triggered and is based on configuration and licensing.
- All of the SQL **Logic** items – If, End If, Else, Select, End Select, Case, and Otherwise.

#### Notes:

- The “commands” in Manitou 2.0.0 are known as “categories” in ManitouNEO.
- Legacy Manitou users have automatic access to these features. If you do not see these features active in your system, please contact your sales representative for more information.

## Permissions - Action Patterns and Enhanced Action Patterns

Before using the Enhanced Action Patterns functionality included in Manitou, you must first set the Action Patterns permission by user or User Group in the Manitou Supervisor Workstation. See the “Permissions” section in the Manitou CS Supervisor Workstation User Manual for information on setting up permissions. Additionally, for users to have the ability to use Action Patterns, they must also have permissions set for Systems, Programming, Transmitters, Areas, and Zones.

## Technical Details - Enhanced Action Patterns

The Enhanced Action Patterns builds upon the original Manitou actions and combines Workflow functionality – Scripts, Prompts, and the recording of responses. There are also a number of new action types that are now available including the ability to test and jump (skip/loop). You can use user-defined variables to hold “prompted” responses or “set” values. Variable names always begin with an @ and can contain letters and the underscore (\_) character only. The response, if any, from a Send command is placed in the @RESULT variable. You can then test this in an IF or SELECT logic action to present different actions to the user based on the command result.

You use string type comparisons unless both the value of the variable and the value you test are both numeric. For string comparisons, “ME” is greater than “ABC,” but “2A” is also greater than “11A.” Variable tests can be “equal,” “less than,” “greater than,” “less than or equal,” “greater than or equal” or “not equal” (=, <, >, <=, >=, <> respectively). Tests of a variable can be against a fixed value or another variable. You use the new SET action to give a variable a value. Examples include “SET @A = 1” or “SET @A = @A + 1.”

The Enhanced Action Patterns allow a powerful use of a template-like structure at a higher level (Company or Dealer) and then specifics can be specified and/or overridden at a lower level (Dealer or Customer) to make dynamic, custom actions (via the INCLUDE action).

The system attempts to resolve as much of the action items as possible when you first access an alarm. All non-variable and non-live alarm state values based IF/ELSE, SELECT/CASE logic trees are evaluated and only the specific, correct sections will be included in the presented actions list with all of the surrounding logic and “false” sections removed. This includes resolving INCLUDE actions and any embedded logic items within them.

```
SELECT EVENT CATEGORY
CASE = BURG
    INCLUDE ACTIONS FROM ACTION PATTERN 'BURG'
CASE = FIRE
    INCLUDE ACTIONS FROM ACTION PATTERN 'FIRE'
CASE = PANIC
    INCLUDE ACTIONS FROM ACTION PATTERN 'PANIC'
OTHERWISE
    INCLUDE ACTIONS FROM ACTION PATTERN 'GENERAL'
END SELECT
```

You could use the above template-like action pattern on most alarms where you find the included details based on the specific Dealer/Customer context. Since the SELECT is based on an Event Value, it will be resolved prior to being presented to the user. The only actions that the user will see are the included ones from the appropriate branch. Actions are included by name. If no Action Pattern by the given name can be found, no actions will be included at that place (does not generate any kind of error). The search order is first Customer, then its Dealer, then its Master Dealer chain, then the Company.

## Differences from Prior Versions

### CALL LIST Action (Elimination of)

ManitouNEO has **eliminated the CALL LIST** action by incorporating Call List selection as part of the CONTACT action.

---

### Critical First Action

There is a new property on the Action Pattern set called **Critical First Action**. Selecting this option skips all of the normal introductory comments and notices when an alarm first presents to an operator until a “First Action” is completed. The actions that qualify as a critical action are CONTACT, NOTIFY, SEND, REPORT, PROMPT, CONNECT, and ESCALATE. In addition, cancelling the alarm by operator action also qualifies as a critical action even though it is not explicitly an Action Pattern action.

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## DEFER Action

**DEFER** now allows you to direct the alarm to the client type that can pick up the alarm after being deferred (Auto-Client or user). This is useful when creating action sets that contain actions that can be performed by the Auto-Client and then transitioning to others that a user should or must perform (and conversely).

---

## INCLUDE Action

The **INCLUDE** action used to have many selectable parameters to determine whether it was included or not – this has been eliminated. It is expected that the new Logic actions will be used to qualify whether the INCLUDE action is a part of the actions or not.

---

## LAUNCH Action

ManitouNEO adds the **LAUNCH** action as a place to initiate access to external data or applications. You can configure user-defined applications in the Manitou Supervisor Workstation which are available as an action LAUNCH type. The three built-in types are URL (Web browser link), Validate P/W module, and Customer Search module.

---

## LOG Action

The **LOG** action can now log the text as a new Maintenance Issue or to the Customer Log as before. The system parses the text to replace action variables with current values as well as any system script variables (for example, {NA} which is the Customer's name).

---

## NOTIFY Action

**NOTIFY** is a new action type which is similar to CONTACT, except that it is not two-way (for example, send a Text message). Thus, a phone call cannot be a NOTIFY Contact Point Type. The "SMS Phone" type of Contact Point can be either a phone type call or a text message and is thus eligible for NOTIFYS.

**CONTACT** and **NOTIFY** can specify automation functions (Reverse Commands). This replaces the OVERRIDE WITH OPEN VOICE and the OVERRIDE WITH AUTOTEXT.

---

## Prior Action Completed Action

A new action status that can be tested in an IF statement is **Prior Action Completed**. This will test to see if the action line just above this IF test has a status of "Actioned" or not

---

(labels are excluded, the line above the label will be used).

---

## PROMPT Action

The new PROMPT action can prompt for simple text, such as a name or worded recap of the just prior phone conversation. It can also be set to enter a value based upon a range, such as 1 to 5 or a list of values – “1,” “2,” “5.” The list can be set up in such a way as to present descriptive selections with underlying values. For example, the operator can pick from either “Was not happy,” “Was okay,” or “Was very happy” with values 1, 2, and 3 respectively that get applied to the variable.

### PROMPT Action Details

You must select the type of data entered on the PROMPT action. It is either “Number,” “Hex Number,” “Text,” “Upper Case Text,” or “List.” If the type is “Number,” then you can use the Mask field to limit the entry to a particular range (for example, 1-5). For “Text” and “Upper Case Text,” the Mask can be a Mask which describes letters, digits, characters, and fixed characters that describe what the entered value must look like. The mask characters can be any of the following:

- 0 – Digit placeholder (0-9)
- & – Any character (space, letter, number, or symbol)
- A – Any letter or digit (upper or lower case) – entry required
- a – Any letter or digit (upper or lower case) – entry optional
- 9 – Digit placeholder for text prompts – entry optional
- C – Any character (space, letter, number or symbol) – same as “&”
- L – Any letter (upper or lower case)

As a short cut, the square brackets surrounding a numeric value act as a “repeat.” For example, C[20] would set a 20 character prompt Mask that accepts any character (limits the response to 20 characters. 00/00/0000 would prompt for a date like entry.)

For “List” type of data, you must supply a list of possible responses and option descriptions. For example, “0|1|2|4” specifies that there are one of four possible entries (0, 1, 2, or 4). “Y;Yes|N;No|M;Maybe” specifies a list in which “Yes,” “No,” and “Maybe” will be presented to the operator which variable set values of “Y,” “N,” or “M” respectively.

---

## SET Action

You use the new SET action to give a variable a value. Examples include “SET @A = 1” or “SET @A = @A + 1.”

You can use the SET action to give a variable a value. In addition to this, you can use it to perform a database search to return a value (text or number) which the system can test. For example, a SET action could check to see how many alarms from the same zone and area you receive in the four hours. Based upon that result, the system could present different actions to the operator.

### Using SQL Statements (SET action)

- The SET action can execute a SQL statement (Select) to populate a variable. An example is:

```
SELECT COUNT(*) FROM CLOG{0} WHERE SERIALNO={ME} AND EVTYPE IN(C
```

The above selects the number of signals, alarms, and ignored signals with the same Event Category, Area, and Zone of the current alarm within the last ten minutes of the alarm and forward. The result of this query will be at least one (1) since it should at least count the current alarm.

- Note that the customer activity (CLOG) records in UTC time. You must use UTC dates to select the appropriate data.
- {ME} is a special replacement variable for the SET action SQL. It is replaced with the current alarm Customer's Serial Number (how data is recorded in Customer Activity).
- Note that you must use the double quote characters around string fields (not the typical single quote).
- Since Customer Activity is in separate tables by month, the notation CLOG{0} selects the current month. CLOG{1} is the prior month and so forth. Since UTC day transitions could happen within the last ten minutes (as this example), the query really needed to check the current month and the prior month. Standard SQL applies. This query would be more accurate regarding the above qualification as follows:

```
SELECT ( SELECT COUNT(*) FROM CLOG{0} WHERE SERIALNO = {ME} AND
or,
```

```
BEGIN; DECLARE @A INT; DECLARE @B INT; SET @A = ( SELECT CO
```

The query is not limited to just Customer Activity. A person knowledgeable in both SQL and Manitou table schema should construct the SQL for a SET statement.

## SHOW Action

The **SHOW** action is now the place to select to view a customer.

---

## Workflow (Elimination of)

ManitouNEO has **eliminated Workflows** and incorporates any unique functionality into the new Enhanced Action Patterns.

---

## Script Messages

**Script Messages** can be attached to any CONTACT action and is required for any NOTIFY action (text of one-way message to send).

---

## Label Names

**Label Names** must be unique within an Action Pattern set. However, included actions can have a label name that duplicates a label in the main set of actions, but the system is able to distinguish between them (even if included multiple times).

## JUMP TO Label

A **JUMP TO** label reference must exist in the current set of actions (that is, it can't jump to a label inside an included set of actions). If jumping "up," the system assumes that it should retry the block of actions between the JUMP TO and the label specified. This will cause the system to clear any previous action status except for CONTACT or NOTIFY attempts that were completely successful.

---

## System Script Variables

ManitouNeo adds several **new system script variables**:

- {GC} = Customer Group Code.
  - {CT} = Customer Type.
  - {DN} = Alarm event date/time – The local time the event occurred in ManitouNEO.
  - {DT} = Event Date – The date the event was sent into ManitouNEO.
  - {DU} = Alarm Event date/time – The UTC time the event occurred in ManitouNEO.
  - {TM} = Event Time – The time the event was sent into ManitouNEO.
  - {AT} = Alarm Event audible type (Silent or Audible).
  - {ET} = Event Description – The description of the alarm event sent into ManitouNEO, such as: Burglary Alarm, Fire Alarm, Opening, Closing, and so on.
  - {PR} = Event Priority – The priority of the alarm event sent into ManitouNEO.
  - {DE} = Event Code – The ManitouNEO code of the event sent into ManitouNEO, such as: BA, FA, MA, PA, \*E, and so on.
  - {CA} = Event Category – The Event Category that contains the alarm sent into ManitouNEO, such as: FIRE, BURG, SYS, and so on.
  - {AR} = Event Area – The number of the Area tripped for the event sent into ManitouNEO.
  - {AD} = Area Description – The description of the Area tripped for the event sent into ManitouNEO, such as: Main Floor, Warehouse, Basement, and so on.
  - {ZN} = Event Zone – The number of the Zone tripped for the event sent into ManitouNEO.
-

- {ZD} = Zone Description – The description of the Zone tripped for the event sent into ManitouNEO, such as: Front Door, Back Door, 3rd Floor Pull Station, and so on.
- {PO} = Event Point ID – The description of the event tied to the Programming Point ID column for the event sent into ManitouNEO, such as: Heat Sensor #3, Water System, and so on.
- {CM} = Event Comment – The description of the person or other comment tied to event sent into ManitouNEO.
- {FE} = FEP No. – The number of the Front End Processor that received the event passed into ManitouNEO.
- {RE} = Receiver No. – The number of the Receiver that received the event passed into ManitouNEO.
- {LI} = Line No. – The physical line on the Receiver that received the event passed into ManitouNEO.
- {RL} = RL Prefix – The prefix assigned to the physical line on the receiver or to the DNIS digits.
- {TX} = Transmitter ID – The account number of the equipment at the location.
- {TT} = Transmitter Type – The default Transmitter Type assigned to the Transmitter receiving the signal into Manitou.
- {CN} = Customer ID – The Customer Account Number.
- {NA} = Customer Name – The display name of the Customer record.
- {A1} = Customer Address Line 1 – The primary street address for the Customer record.
- {A2} = Customer Address Line 2 – The secondary street address for the Customer record. Such as: Apartment Number, Suite Number, and so on.
- {A3} = Customer Address Line 3 – The third street address for the Customer record.
- {CS} = Customer Cross Street.
- {CV} = Customer Subdivision.
- {AC} = Customer City/Town – The city in which the Customer record resides.
- {AS} = Customer State/Province – The region in which the Customer record resides.
- {AP} = Customer Zip/Post Code – The zip code or postal code in which the Customer record resides.



- {CC} = Customer Class Code.
- {CG} = Customer Group Code.
- {PH} = Customer Telephone Number – The primary telephone number for the Customer record.
- {BC} = Customer A/R Company.
- {BN} = Customer A/R Number.
- {AN} = Alarm Company Name – The name listed on the Monitoring Company record.
- {RN} = Callback Telephone Number – The number provided to the recipient to call back.
- {DI} = Dealer ID – The Dealer ID listed on the customer record.
- {DL} = Dealer Name – The installer listed on the customer record.
- {BI} = Branch ID – The Branch listed on the customer record.
- {BR} = Branch Name – The name of the Branch listed on the customer record.
- {PT} = Panel Type – The Panel type listed for the System on the customer record.
- {PD} = Panel Description – The Panel description listed for the System on the customer record.
- {PC} = Panel Type Comment – The Panel Type comment listed for the Panel Type listed on the System for the customer record.
- {YN} = System Number – The number of the system for the event tripped on the customer record.
- {YD} = System Description – The description of the system for the event tripped on the customer record.
- {YT} = System Type – The type of system for the event tripped on the customer record.
- {YI} = System ID – The ID of the system for the event tripped on the customer record.
- {SN} = Event Sensor – The sensor tripped on the event for the customer record.
- {DV} = Event Device ID.
- {DD} = Event Device Description.
- {SC} = Event Sector.

- {SD} = Event Sector Description.
- {UC} = Contact Name – The name of the person on the Contact List for the Customer record.
- {UP} = Contact’s Contact Point – The phone number, or other contact point, of the person on the contact list.
- {UT} = Contact’s Contact Point Type – Phone, email, or other contact point type of the person on the contact list.
- {US} = Contact’s Subtype Description – How the person is listed based the number correlation to the Subtypes card. (Found in the Supervisor Workstation – Subtypes)
- {UD} = Contact’s Contact ID.
- {VR} = Event Confirmed Status.
- {UL} = UL Grade – Pulls from the UL Grade list found within the Supervisor Workstation that is applied to the customer record.
- {RT} = UL Response Time.
- {UI} = User/Operator ID – The ID of the ManitouNEO user.
- {RD} = Report Description – The name of the report included in the outgoing email. This is ONLY used for Email body text.
- {AF} = Attach Data File (When applicable).
- {ME} = The serial number of the customer record, used for Enhanced Action Pattern (EAP) queries.
- CLOG{0} = The Customer Activity Log for this current month.
- CLOG{1} = The Customer Activity Log for the previous month each number in the {} represent how many months back. They must be in order 0, 1, 2, and so on.
- {U1} through {U??} = User Defined Fields – The link to the applicable user Defined field to be included in the outgoing message.

---

## Qualify Action Pattern Set

You can **qualify an Action Pattern** set with a “From” and/or “To” Date. This allows the set to be valid starting from a particular date in the future, cease to be valid upon reaching a particular date in the future, or be valid for a particular range of dates. You can use this to create an Action Pattern set that you will use temporarily to override a more general one at

a higher level. This can be a main Action Pattern set or an included one to do something different for a period of time.

---

## INSCHED() Programming

There is a new IF test of **INSCHED()**. This will test the selected General Schedule, of Action Pattern type, to see if it is currently scheduled (uses Customer local time). This allows the system to perform different actions based on time of day.

All IF tests that are Yes/No (True/False) can be inverted with a NOT property (for example, IF NOT Site On Test). You can also use this with INSCHED (for example, IF NOT INSCHED(x)).

---

## Silent() Programming

There is a new **Silent() programming** function which marks an alarm as being silent (holdup). By default, the assumption is to be “Audible.” This can be tested on an IF logic line to do something different if silent v. audible.

---

## Auto Property

There is a new property that applies to all actionable items which is **Auto** (the system automatically performs the action if it is the next “to do”).

---

## Hidden Property

**Hidden** is an additional property which will cause the action to not show in the list of actions presented to the user. An item must first be Auto before it can be Hidden. LOG and SET are currently the only two types of actions that can be Hidden.

---

## Specifics of Alarm Handling in Relation to Enhanced Action Patterns

1. Alarm Handling
    - a. Defer
      - i. Normal
      - ii. To Auto-Client (signals the end of actions to be performed by the user)
      - iii. To operator (signals the end of actions to be performed by the Auto-Client)
-

- b. Suspend (with optional new alarm priority setting)
  - i. Seconds
  - ii. Minutes
  - iii. Hours
  - iv. Until (selected Action Pattern type General Schedule becomes “in schedule”)
- c. Close (with optional Resolution Code pre-fill)
- d. Escalate (create a new alarm – can be directed to a different customer)
  - i. Customer (with option to allow user to change before new alarm is created)
  - ii. Event Code
  - iii. Monitoring Group
  - iv. Transmitter Number (with option to allow user to change before new alarm is created)
  - v. Area (with option to allow user to change before new alarm is created)
  - vi. Zone (with option to allow user to change before new alarm is created)
  - vii. Force Close of original alarm
  - viii. Resolution Code pre-fill (when original is force closed)

## 2. Entity Handling

- a. Contact (select entity and optional Contact Point or call list if not a person – optional Automation Type and optional Script Message)
- b. Notify (select entity and optional Contact Point or Call List if not a person – optional automation type and optional script message – optional Broadcast setting will cause automated notification to all of the appropriate Contact Points of the specified Call List)
- c. Report (select entity and optional Contact Point or Call List if not a person)

## 3. Action Handling

- a. Wait (was Workflow function)

- b. Include
  - c. Jump To (changes the next “to do” to be the first un-actioned item below the selected label – can jump up or down)
  - d. Label (marker for Jump To action – must be unique for a given Action Pattern)
4. Data Handling
- a. Launch (pick type and optional application)
  - b. Show
  - c. Prompt (describe data type and range/select list)
  - d. Set
  - e. Remark
  - f. Log Line (select whether to log to Customer Activity or create a Maintenance Issue)
5. External Handling
- a. Send
  - b. Connect
6. Logic Handling
- a. If
  - b. Else (optional section if the IF test failed)
  - c. End If (required for each IF)
  - d. Select
  - e. Case (one or more – if only one, then IF may be a better choice)
  - f. Otherwise (optional catch-all if none of the preceding CASE tests were true)
  - g. End Select (required for each SELECT)
-

## Maintenance Issues

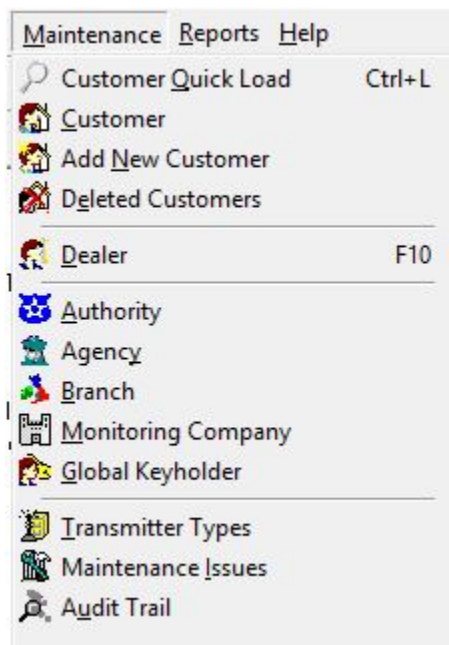
The Maintenance Issues function allows a Manitou user to record details of any administrative issues with particular system records as they are encountered. Items entered into the list can then be addressed and resolved by a Supervisor or System Administrator.

Please refer to the related subtopics on the Contents tab.

### Viewing an Existing Maintenance Issue

Perform the following steps to view an existing Maintenance Issue in Manitou:

1. Open Manitou.  
**Note:** the steps in this section can be performed in either the Supervisor Workstation or the Operator Workstation.
2. Navigate to the “Maintenance” menu, and select the “Maintenance Issues” form as shown in the following screenshot:



**Result:** the “Maintenance Issues” form displays as shown in the following screenshot:

Logged	User ID	Type	Contact ID	Name	Person ID	Name	Description	Notes	Last Action	Technician	Create New
05/09/2014 11:51:38	BOLD	Customer	1001-CLUST	Ben Abernathy		Contact	new issue	new notes	05/09/2014 11:51:38		Create New
05/27/2014 14:06:58	BOLD	Customer	THUNDER	Roaring / get Roaring		Call			05/27/2014 14:06:58		Create New
05/27/2014 14:14:37	BOLD	Customer	BLUEFISH	Blue Fish		Purple Fish	Erra contacting (201) 405-1321	SDAFAGDF	06/25/2014 10:17:19		Create New
05/28/2014 08:38:55	BOLD	Customer	BLUEFISH	Blue Fish		Purple Fish	Erra contacting (201) 405-1321	SDFAGD	06/25/2014 10:17:12		Create New
07/25/2014 12:12:18	DUPHUE	Customer	BOUNCE	Bounce House		High Wind	Need to add Clarence's note to	notes	09/16/2014 13:04:19		Create New
07/31/2014 14:34:37	DUPHUE	Customer	CLARENCE	Clarence Circle		Person not on file (1372)	ghygh		09/16/2014 13:04:19		Create New
08/19/2014 11:48:14	BOLD	Customer	AT-GRATE	Grate Hydration		ghygh			10/21/2014 12:29:22	Real MacEmail	Create New
09/25/2014 13:44:37	BOLD	Global	44473	Any Contact		Bobcat Dealer	testing 123	ghygh	06/25/2014 09:53:04		Create New
09/25/2014 09:52:48	DEALER	Dealer	DUPHUE	GH Dealer		Contact One	ghygh	ghygh	06/25/2014 09:53:04		Create New
09/25/2014 10:37:22	BOLD	Customer	VANNA	Vanna's Account		Contact One	ghygh	ghygh	06/25/2014 10:38:36		Create New

3. Double-click the Maintenance Issue you want to view.

**Result:** the “View Maintenance Issue” window displays as shown in the following screenshot:

**View Maintenance Issue**

Contact type: Customer Contact ID: 1111

Name: Doug Technician: Nial MacDnald

Person: Tech On Site: ☐

Priority: 4 Appt Date: 10/21/2014 6:00:00 PM

Issue: 117 Service Type: Panel Upgrade

Logged: 10/06/2014 13:34:08 Last Action: 10/21/2014 10:16:31

User: MEL Resolved: 10/21/2014 10:16:31

Description:

Test Issue

Notes:

edfsdfs  
MEL - 10/06/2014 13:34:16  
sadsadsa  
Technician On Site status changed from [Not On Site] to [On Site].

Close

**Note:** information on the “View Maintenance Issue” form is not editable.

4. When you are finished viewing the Maintenance Issue, click “Close”..

## Creating a New Maintenance Issue

Perform the following steps to create a new Maintenance Issue in Manitou:

1. Open Manitou.

**Note:** the steps in this section can be performed in either the Supervisor Workstation or the Operator Workstation.

2. Navigate to the Maintenance menu, and select the “Maintenance Issues” option as shown in the following screenshot:



**Result:** the “Maintenance Issues” form displays as shown in the following screenshot:

Maintenance Issues										
Logged	Date ID	Type	Contact ID	Name	Person ID	Name	Description	Notes	Last Action	Technician
05/05/2014 11:51:38	BOLD	Customer	ASU-CUST	Ann Stenroth		Contract	new school	new notes	05/05/2014 11:51:38	
05/07/2014 14:06:58	BOLD	Customer	THUNDER	Nothing / get Nothing		Contract	edit		05/07/2014 14:06:58	
05/07/2014 14:14:37	BOLD	Customer	BLUEFISH	Blue Fish		Purple Fish	Enix contacting (201) 485-1325	1047A209	05/07/2014 14:14:37	
05/08/2014 06:29:59	BOLD	Customer	BLUEFISH	Blue Fish		Purple Fish	Enix contacting (201) 485-1325	1471A050	05/08/2014 06:29:59	
07/25/2014 13:12:14	CUPLER	Customer	BOUNCE	Bounce House		High school	new office number, please	edit	10/01/2014 13:04:19	
07/25/2014 14:34:37	CUPLER	Customer	CLARENCE	Clarence Cagle			Need to add Clarence's email to	notes	06/16/2014 13:57:57	
06/13/2014 11:48:14	BOLD	Customer	MYERATE	Myrate Hydration		Person not on file (1372)	giphyhigh			
06/09/2014 13:44:37	BOLD	Global	AMPV1	Any Condition		Person	new	gph	10/21/2014 12:28:22	HeidiMacDonald
06/25/2014 09:55:48	DEALER	Dealer	CUPLER	CUPLER		Business Center	moving 123	strawberry	06/25/2014 09:55:48	
06/25/2014 10:37:22	BOLD	Customer	YANMA	Yanma's Account		Contract One	highing	delivered	06/25/2014 10:37:22	

- Click “**Create New**” as shown in the following screenshot:



**Result:** the “New Maintenance Issue” window displays as shown in the following screenshot:



**New Maintenance Issue**

Contact type: [dropdown]  
Name: [text box] Technician: [dropdown]  
Tech On Site: [checkbox]  
Priority: [dropdown: 0] Appt Date: [date/time picker: 12:00:00 AM]  
Issue: [dropdown: 0] Service Type: [dropdown]  
Logged: 10/29/2014 14:37:28 Last Action: [text box]  
User: BOLD Resolved: [text box]  
Description: [text area]  
[Save Changes] [Cancel]

4. Select an option from the “Contact type:” menu as shown in the following screenshot:

Company  
Customer  
Dealer  
Branch  
Agency  
Authority  
Global Keyholder

**Result:** if you selected any option other than “Company”, the “Contact ID:” menu displays as shown in the following screenshot:

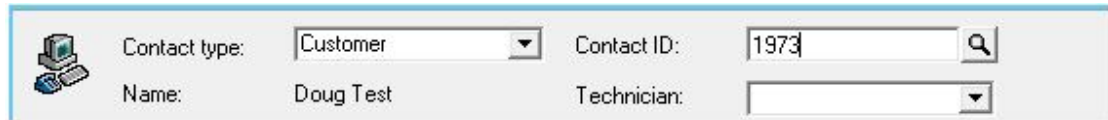
Contact ID: [text box] [magnifying glass icon]

**Note:** if you selected the “Company” option, the “New Maintenance Issue” window now displays with the company name as shown in the following screenshot:

Contact type: [Company]  
Name: Not so Central Station Technician: [dropdown]

5. If you selected an option from the “Contact type:” field that is anything other than “Company”, enter a contact ID into the “Contact ID:” field, and then press “**Enter**”.

**Result:** the entity name now displays on the “New Maintenance Issue” window as shown in the following screenshot:



The screenshot shows a form with the following fields:

- Contact type:** A dropdown menu with "Customer" selected.
- Contact ID:** A text field containing "1973" and a search icon.
- Name:** A text field containing "Doug Test".
- Technician:** A dropdown menu.

6. Select a technician from the “Technician:” dropdown menu as shown in the following screenshot:



The screenshot shows a dropdown menu with the following options:

- Tech Name
- Nial MacDnald
- Bill
- Central Tech
- Global Keyholder #1

7. If you want, select the person who reported the Maintenance Issue from the “Person:” dropdown menu.
8. Select the “Tech on Site” checkbox if the technician designated to perform the maintenance is located where the maintenance is to be performed.
9. Define a priority level for the Maintenance Issue in the “Priority” field.

**Note:** 1 is the highest priority level and 10 is the lowest priority level.

10. Select a date and time in the “Appointment Date:” field.
11. Select a service type from the “Service Type:” dropdown menu.
12. Enter a description of your Maintenance Issue into the “Description:” field.

**Result:** the “**Save Changes**” button now displays enabled as shown in the following screenshot:

**New Maintenance Issue**

Contact type: Customer Contact ID: 1973

Name: Doug Test Technician: Nial MacDnald

Person: Tech On Site: ☒

Priority: 3 Appt Date: 10/30/2014 9:00:00 AM

Issue: 0 Service Type: Replace Battery

Logged: 10/29/2014 14:37:28 Last Action:

User: BOLD Resolved:

Description: dead battery

Save Changes Cancel

13. Click **"Save Changes"**.

**Result:** the Maintenance Issue you created displays in the list as shown in the following screenshot:

10/29/2014 15:48:45	BOLD	Customer	1973	Doug Test		dead battery		Nial MacDnald
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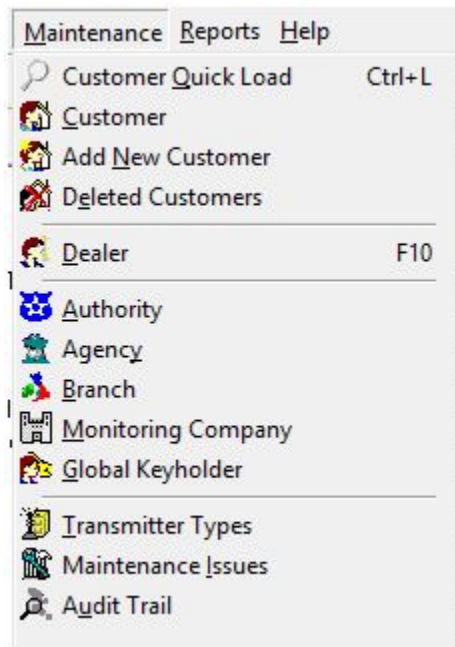
## Editing a Maintenance Issue and Marking it as Resolved

**Note:** you can only edit Maintenance Issues that you created.

Perform the following steps to edit an existing Maintenance Issue:

1. Open Manitou.
 

**Note:** the steps in this section can be performed in either the Supervisor Workstation or the Operator Workstation.
2. Navigate to the Maintenance menu, and select the "Maintenance Issues" option as shown in the following screenshot:



**Result:** the “Maintenance Issues” form displays as shown in the following screenshot:

Logged	User ID	Type	Contact ID	Name	Person ID	Name	Description	Notes	Last Action	Technician	Create New
10/01/2014 11:51:38	BOLD	Customer	4411151	Ben Abernathy		Contact	new issue	new notes	05/05/2014 11:51:38		Create New
05/07/2014 14:06:59	BOLD	Customer	THUNDER	Trailing Light Trailing		ext			05/07/2014 14:06:59		Edit Selected
05/07/2014 14:14:37	BOLD	Customer	BLUEFISH	Blue Fish		Purple Fish	Error contacting (205) 405-1321	SDAFASDF	06/25/2014 10:17:19		Reassign Selected
05/28/2014 06:39:59	BOLD	Customer	BLUEFISH	Blue Fish		Purple Fish	Error contacting (205) 405-1321	SDAFASDF	06/25/2014 10:17:12		Reassign Selected
07/25/2014 12:12:16	SAFARI	Customer	BOUNCE	Bounce House		High Wind	new office number please	nt	10/01/2014 11:04:19		Go to Record
07/01/2014 14:34:37	SAFARI	Customer	LAURENCE	Laurence Cough			Need to add Dealer's name to	notes	09/14/2014 13:57:57		
09/19/2014 11:40:18	BOLD	Customer	W/GRATE	Travis Hydration			Person not on file (1272)	ghigh			
09/20/2014 13:44:37	BOLD	Global	AMPT	Amey Condon			word	ghh	10/21/2014 12:29:22	RealMacDonald	
09/25/2014 09:52:40	DEALER	Dealer	DUNBORN	GB Dealer		Broken Dealer	testing 123	disturbat	06/25/2014 09:53:04		
09/25/2014 10:37:32	BOLD	Customer	140864	Yann's Account		Contact One	highing	disturbat	09/25/2014 10:38:36		

3. Select the Maintenance Issue you want to edit on the grid as shown in the following screenshot:

Logged	User ID	Type	Contact ID	Name	Person ID	Name	Description	Notes	Last Action	Technician
10/01/2014 14:58:01	SIDHNDUR	Customer	408	Ice Ice Baby			SYSTEM GENERATED: video	sdhndur	10/24/2014 15:06:03	Central Tech
10/20/2014 13:34:38	nt	Customer	1111	George			last issue	sdhndur	10/20/2014 13:34:38	RealMacDonald

4. Click “Edit Selected” as shown in the following screenshot:



**Result:** the “Edit Maintenance Issue” window displays as shown in the following screenshot:

**Edit Maintenance Issue**

Contact type: Customer Contact ID: 1973

Name: Doug Test Technician: Nial MacDnald

Person: Tech On Site: ☒

Priority: 3 Appt Date: 10/30/2014 3:00:00 AM

Issue: 106559 Service Type: Replace Battery

Logged: 10/29/2014 15:48:45 Last Action:

User: BOLD Resolved:

Description: dead battery

Notes:

New Notes:

☐ Resolved

Save Changes Cancel

5. Modify existing text, or enter new text.

6. When you are finished editing the Maintenance Issue you selected, click **“Save Changes”**.

**Result:** the updated Maintenance Issue displays in the grid as shown in the following screenshot:

10/29/2014 15:48:45	BOLD	Customer	1973	Doug Test		dead battery	really dead battery	10/29/2014 15:43:25	Nial MacDnald
---------------------	------	----------	------	-----------	--	--------------	---------------------	---------------------	---------------

7. If you enter text into the “New Notes:” area of the “Edit Maintenance Issue” form, the “Resolved” checkbox displays enabled as shown in the following screenshot:

**Edit Maintenance Issue**

Contact type: Customer Contact ID: 1973

Name: Doug Test Technician: Nial MacDnald

Person: Tech On Site: ☒

Priority: 3 Appt Date: 10/30/2014 3:00:00 AM

Issue: 106559 Service Type: Replace Battery

Logged: 10/29/2014 15:48:45 Last Action:

User: BOLD Resolved:

Description: dead battery

Notes:

New Notes: really dead battery

☐ Resolved Save Changes Cancel

8. When you are ready to close the Maintenance Issue, select the “Resolved” checkbox and then click “**Save Changes**”.

**Result:** the Maintenance Issue now displays gray in the grid as shown in the following screenshot:

10/29/2014 06:32:22	ONTARIO Customer	TIGER123	David Tiger		2	ASDFSEF	10/29/2014 12:45:02
10/29/2014 15:48:45	BOLD	Customer	1973	Doug Test		dead battery	really dead battery

**Note:** Maintenance Issues in the grid display gray once they have been marked as resolved and saved. You can modify these settings in the Supervisor Workstation -> Tools -> Options -> Color Options. You can also resolve an existing Maintenance Issue by selecting it from the grid, and then selecting “**Resolve Selected**”. The “**Resolve Selected**” button automatically designates a

Maintenance Issue as resolved, and causes it to display gray in the grid. A user who resolves a Maintenance Issue through the “**Resolve Selected**” button does not get an opportunity to enter additional notes. Once a Maintenance Issue has been resolved and saved, you cannot edit it again unless you change its status. The “View Maintenance Issue” form displayed in the following screenshot shows a Maintenance Issue that was resolved, saved, and then reopened for viewing. Notice that it does not include a “**Save Changes**” button. It is not editable.

**View Maintenance Issue**

Contact type: Customer Contact ID: 1973

Name: Doug Test Technician: Nial MacDnald

Person: Tech On Site: ☒

Priority: 3 Appt Date: 10/29/2014 9:00:00 AM

Issue: 106559 Service Type: Replace Battery

Logged: 10/29/2014 15:48:45 Last Action: 10/31/2014 10:51:20

User: BOLD Resolved: 10/31/2014 10:51:20

Description:

dead battery

Notes:

Appointment date changed from [10/30/14 03:00:00 AM] to [10/29/14 09:00:00 PM].  
BOLD - 10/31/2014 10:43:25

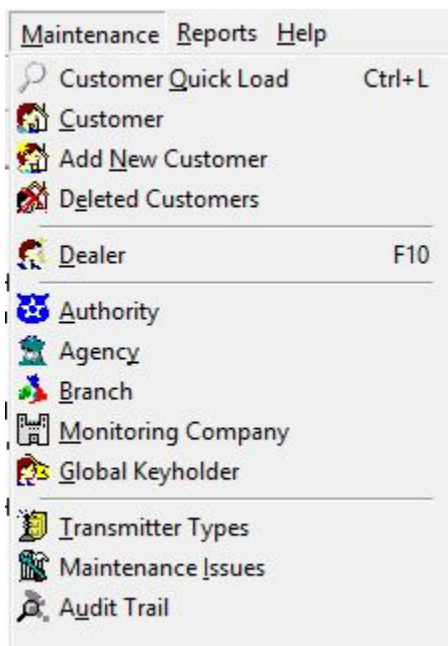
Miracle Max brought the battery back to life - for a small fee, of course.  
BOLD - 10/31/2014 10:51:20

Close

## Adding a New Technician

Perform the following steps to add a new maintenance technician in Manitou:

1. Open the Operator Workstation.
2. Navigate to the “Maintenance” menu, and select the “Monitoring Company” option as shown in the following screenshot:



**Result:** the following form displays:

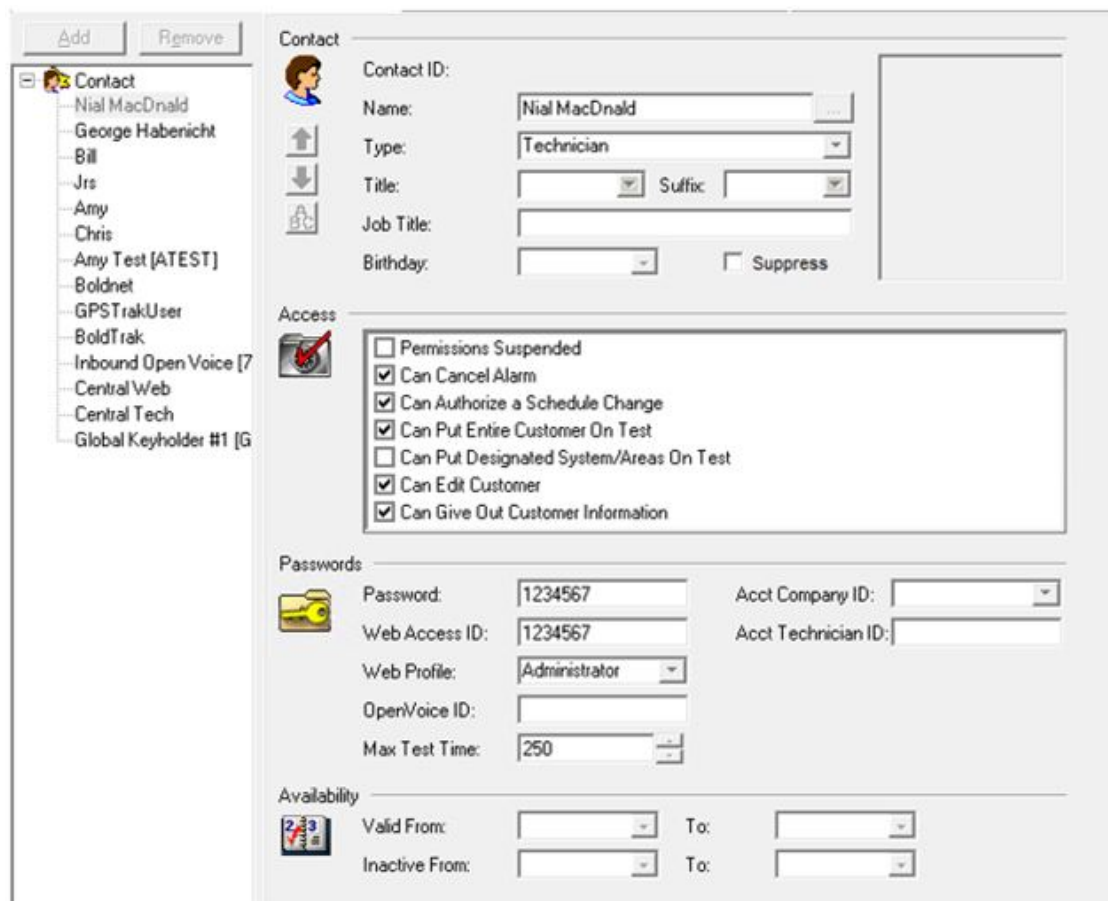
3. Select the “Contact List” option from the Jump To menu as shown in the following screenshot:



Jump To 

- ☐ Monitoring Compar
- ☒ Contact List
- ☐ Call Lists
- ☐ Comments

**Result:** the “Contact” form displays as shown in the following screenshot:



**Contact**

Contact ID:

Name:

Type:

Title:  Suffix:

Job Title:

Birthday:  ☐ Suppress

**Access**

☐ Permissions Suspended

☒ Can Cancel Alarm

☒ Can Authorize a Schedule Change

☒ Can Put Entire Customer On Test

☐ Can Put Designated System/Areas On Test

☒ Can Edit Customer

☒ Can Give Out Customer Information

**Passwords**

Password:  Acct Company ID:

Web Access ID:  Acct Technician ID:

Web Profile:

OpenVoice ID:

Max Test Time:

**Availability**

Valid From:  To:

Inactive From:  To:

4. Click “Edit”, and then click “Add”.

**Result:** the “Add Keyholder” window displays as shown in the following screenshot:

**Add Keyholder**

☒ Keyholder    ☐ Global Keyholder


Name:

Country:

Language:

Time Zone:

**Contact**

 Site

Home

Business

Mobile

OK Cancel

5. Select an option to indicate whether your new technician is a “Keyholder” or a “Global Keyholder”.
6. Enter a name and contact information for your new Keyholder.
7. When you finish entering details for your new contact, click “OK”.

**Result:** your new technician now displays on the “Contact” form as shown in the following screenshot:

**Contact**

Contact ID:

Name:  ...

Type:

Title:  Suffix:

Job Title:

Birthday:  ☐ Suppress

**Access**

☐ Permissions Suspended

☐ Can Cancel Alarm

☐ Can Authorize a Schedule Change

☐ Can Put Entire Customer On Test

☐ Can Put Designated System/Areas On Test

☐ Can Edit Customer

☐ Can Give Out Customer Information

**Passwords**

Password:  OpenVoice ID:   
 Web Access ID:  Max Test Time:   
 Web Profile:

**Availability**

Valid From:  To:   
 Inactive From:  To:

8. Select the “Technician” option from the “Type” dropdown menu as shown in the following screenshot:

Type:

Title:

Job Title:

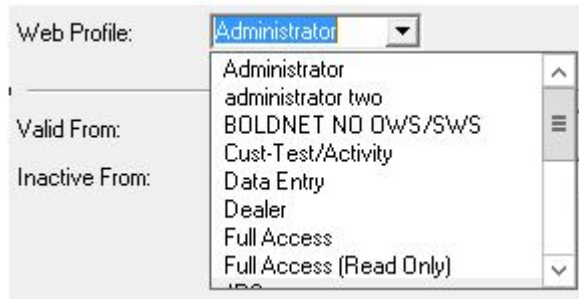
Birthday:

Permissions Suspended: ☐

Contact  
 Corporate Contact  
 Customer type Jose  
 Janitor  
 Keyholder  
 PDC Contact  
 Person  
 Technician

9. Select checkboxes in the “Access” area of the form to indicate the specific actions for which you want your technician to be authorized.
10. Enter a password for your technician into the “Password:” field.
11. Enter an ID into the “Web Access ID:” field.
12. Select an option from the “Web Profile:” dropdown menu as shown in the following

screenshot:



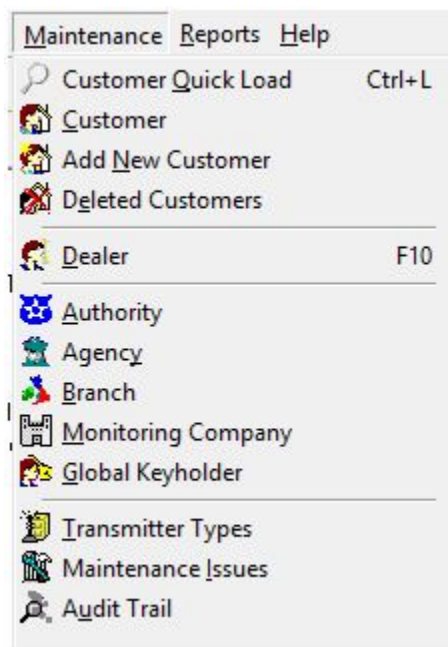
13. Click **“Save”**.

## Reopening a Maintenance Issue

You can change the status of a Maintenance Issue (and enable it for editing) by using the **“Reopen Selected”** button.

Perform the following steps to reopen a closed Maintenance Issue:

1. Open Manitou.  
**Note:** the steps in this section can be performed in either the Supervisor Workstation or the Operator Workstation.
2. Navigate to the Maintenance menu, and then select the “Maintenance Issues” option as shown in the following screenshot:



**Result:** the “Maintenance Issues” form displays as shown in the following

screenshot:

Maintenance Issues										
Logged	User ID	Type	Contact ID	Name	Person ID	Name	Description	Notes	Last Action	Technician
05/05/2014 11:51:38	BOLD	Customer	MAICUSY	Ben Abernathy		Contact	new issue	new notes	05/05/2014 11:51:58	
05/27/2014 14:06:59	BOLD	Customer	THUNDER	Nothing I got Nothing		end			05/27/2014 14:24:18	
05/27/2014 14:14:37	BOLD	Customer	BLUEFISH	Blue Fish		Purple Fish	Error contacting (205) 485-1320	SCADA/SCF	06/25/2014 10:17:19	
05/26/2014 06:39:59	BOLD	Customer	BLUEFISH	Blue Fish		Purple Fish	Error contacting (205) 485-1320	SAF/ASD	06/25/2014 10:17:12	
07/25/2014 12:12:16	DUPRUE	Customer	BOUNCE	Bounce House		High vinyl	new office number, please	not	10/01/2014 13:04:19	
07/21/2014 14:38:37	DUPRUE	Customer	CLARENCE	Clarence Gangle		Person not on file (71373)	Need to add Clarence's name to	notes	09/16/2014 13:57:57	
06/19/2014 11:48:16	BOLD	Customer	HYDRATE	Hydrate		Person not on file (71373)	gfhghgh		10/21/2014 12:29:22	Neil MacDonald
06/25/2014 13:44:37	BOLD	Global	AMV1	Army Contract		Subnet Deploy	testing 123	deleted	06/25/2014 09:53:04	
06/25/2014 09:52:46	DEALER	Dealer	DUPRUE	US Dealer		Contact One	highlig	deleted	06/25/2014 10:30:36	
06/25/2014 10:37:22	BOLD	Customer	YANNA	Yanna's Account		Contact One	highlig	deleted	06/25/2014 10:30:36	

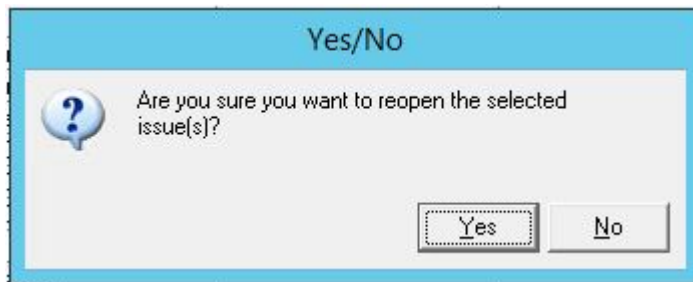
- Select the Maintenance Issue that you previously saved and closed as shown in the following screenshot:

10/25/2014 10:40:45	BOLD	Customer	1973	Drug Test		Drug Test		10/25/2014 10:51:20	Neil MacDonald
---------------------	------	----------	------	-----------	--	-----------	--	---------------------	----------------

- Click **“Reopen Selected”** as shown in the following screenshot:

Reopen Selected

**Result:** the “Yes/No” window displays as shown in the following screenshot:



- Click **“Yes”**.

**Result:** the “Edit Maintenance Issues” window displays with the **“Save Changes”** button indicating that it is now editable.

**Edit Maintenance Issue**

Contact type: Customer Contact ID: 1973

Name: Doug Test Technician: Nial MacDnald

Person: Tech On Site: ☒

Priority: 3 Appt Date: 10/29/2014 3:00:00 AM

Issue: 106559 Service Type: Replace Battery

Logged: 10/29/2014 15:48:45 Last Action: 10/31/2014 12:48:25

User: BOLD Resolved:

Description:  
dead battery

Notes:  
really dead battery  
Appointment date changed from [10/30/14 09:00:00 AM] to [10/30/14 03:00:00 AM].  
BOLD - 10/30/2014 17:17:18  
battery is not really dead - only mostly dead

New Notes:

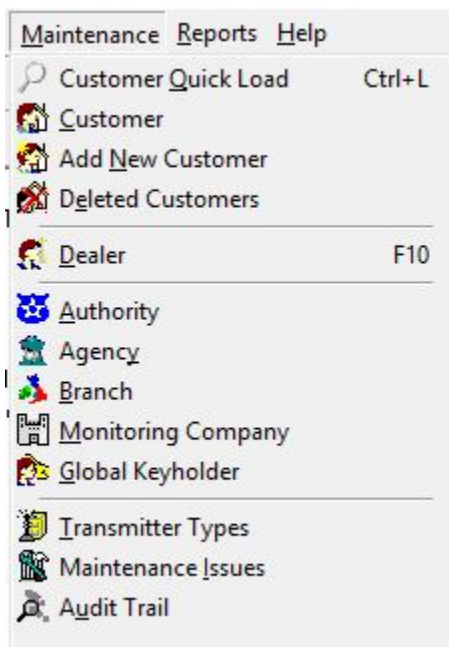
☐ Resolved

Save Changes Cancel

## Searching for an Existing Maintenance Issue using Filters

Perform the following steps to apply a filter to search for existing Maintenance Issues:

1. Open Manitou.  
**Note:** the steps in this section can be performed in either the Supervisor Workstation or the Operator Workstation.
2. Navigate to the Maintenance menu, and select “Maintenance Issues” as shown in the following screenshot:

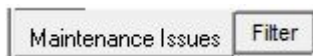


**Result:** the “Maintenance Issues” form displays as shown in the following screenshot:

Logged	User ID	Type	Contact ID	Name	Person ID	Name	Description	Status	Last Action	Technician	Create Note
05/05/2014 11:51:38	BOLD	Customer	MAVCLUT	East Abernathy		Contact	new issue	new index	05/05/2014 11:51:58		Link Selected
05/07/2014 14:36:58	BOLD	Customer	THUNDER	Nothing I got Nothing			all		05/07/2014 14:24:18		Positive Selected
05/07/2014 14:14:27	BOLD	Customer	BLUEFISH	Blue Fish		Purple Fish	Error contacting (201) 405-1325	CONFACCT	06/25/2014 10:17:19		Positive Selected
05/06/2014 06:39:55	BOLD	Customer	BLUEFISH	Blue Fish		Purple Fish	Error contacting (201) 405-1325	SAP (SAP)	06/25/2014 10:17:12		Positive Selected
07/05/2014 12:12:16	DUPHUE	Customer	BOUNCE	Bounce House		High Wheel	new office number, please	all	10/01/2014 13:04:19		Positive Selected
07/05/2014 14:36:37	DUPHUE	Customer	CLARENCE	Clarence Circle			Need to add Clarence's name to	notes	09/16/2014 13:57:57		
08/19/2014 11:49:16	BOLD	Customer	HYDRATE	Hydra Hydration		Person not on file (1372)	highlight				
08/25/2014 13:44:37	BOLD	Global	JEAN'S	Jeany Cardini			new	gph	10/01/2014 12:29:32	Real MacEmail	
08/25/2014 09:52:48	DEALER	Dealer	DUPHUE	DE Dealer		Baldwin Dealer	testing 123	dnacat	08/25/2014 09:53:04		Save Record
08/25/2014 10:37:22	BOLD	Customer	YARNA	Yarnah Account		Contact One	highlight	dnacat	08/25/2014 10:38:36		

3. Scroll to the bottom of the form.

**Result:** the “Filter” tab displays as shown in the following screenshot:



4. Click “Filter”.

**Result:** the following Maintenance Issues Filter form displays as shown in the following screenshot:

**Date**

☒ Logged Date  
☐ Last Action Date  
☐ Appointment Date  
☐ Resolved Date

Date From: 05/01/2014 00:00:00  
Date To: 10/31/2014 23:59:59

**Resolution**

☒ Unresolved  
☐ Resolved  
☐ Both

**User**

User ID: [dropdown]

**Contact Types**

☐ Company  
☐ Customer  
☐ Dealer  
☐ Branch  
☐ Agency  
☐ Authority  
☐ Person

**Contact ID**

Contact ID From: [text]  
Contact ID To: [text]

**Technicians**

☐ Nial MacDnald  
☐ Bill  
☐ Central Tech  
☐ Global Keyholder #1  
☐ Unassigned

**Technician On Site:** Any

**Service Type:**  
☐ Panel Upgrade  
☐ Replace Battery  
☐ Unknown Pan...

**Priority:** Any

Search Clear

5. Select a date option and range from the “Date” area of the form.
6. Select a contact type from the “Contact Types” area of the form.
7. In the “Resolution” area of the form select whether the Maintenance Issue for which you are looking has been resolved, remains unresolved, or can be in either completion status.
8. Select the Manitou user who created the Maintenance from the “User” dropdown list as shown in the following screenshot:

ID	Name
1	User A
1973	Doug M
2	Odin
3	Tom
4	User C
AMYC	Amy Condon
BLAH	a

9. Select the technician associated with the Maintenance Issue you want to find in the “Technicians” area of the form.
10. Select whether or not the Maintenance Issue for which you are searching was designated as on site. Your options for the menu are shown in the following screenshot:

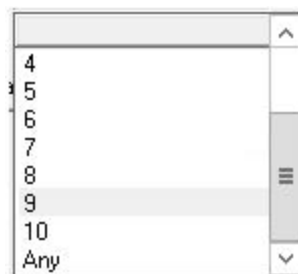




11. Select a service type from the “Service Type:” dropdown menu as shown in the following screenshot:



12. Select a priority level for the Maintenance Issue you want to find from the “Priority:” dropdown menu as shown in the following screenshot:



13. When you are finished entering parameters, click “Search”.

**Result:** your search results display as shown in the following screenshot:

Maintenance Issues										
Logger	User ID	Type	Contact ID	Name	Person ID	Name	Description	Notes	Last Action	Technician
10/20/2014 13:44:37	BOLD	Global	AM/1	Any London1			test1		10/21/2014 12:29:22	Nial MacDnald
10/21/2014 13:22:13	BOLD	Customer	BOUNCE	Bounce House		Push Pin	shdtd	shdtd	10/29/2014 13:30:09	Nial MacDnald
10/26/2014 13:24:58	HEL	Customer	1111	Doug			Test Issue	shdtd	10/21/2014 10:16:31	Nial MacDnald
10/26/2014 16:10:59	BOLD	Customer	PinChalk	Twinkle test account			extendedly grantha ghrtgghg	Revised	10/26/2014 16:10:27	Nial MacDnald
10/29/2014 15:48:45	BOLD	Customer	1573	Doug Test			dead battery	really dead battery	10/31/2014 13:16:56	Nial MacDnald

**Note:** in the search results above, the user searched for all Maintenance Issues associated with technician “Nial MacDnald”.














## Plans











A Manitou Plan is the framework or canvas, on which layers of information are built. Plans themselves (e.g., a map, blueprint, picture, etc.) would be considered "Layers" in Manitou CS 2.0.0. Devices, zones, areas, linking elements, labels, etc. are "Objects" and information that get added to these layers.

The screenshot displays a Revit software window with a floor plan titled "Plan B - Outer Area". A large red arrow points to the "Plan toolbar" at the bottom of the window. The toolbar contains various icons for navigation and editing, including a zoom in icon, a zoom out icon, a pan icon, and a select icon. The plan itself shows a complex layout with multiple rooms labeled "BR" (Bedroom), "L-D" (Living-Dining), "K" (Kitchen), and "BALC" (Balcony). The interface is titled "Plan B - Outer Area" and "Layers: 2 - a".

## Plan Toolbar Summary

Manitou CS Operator Workstation User Guide | © Copyright 2017 Bold Technologies LTD

Button	Function
	<b>Zoom-out:</b> Reset the view to fit-to-screen
	<b>Select an Area to Zoom:</b> Allows you to zoom into a specific area on the layer
	<b>View Current Layer in Full-screen</b>
	<b>Search for Objects</b>
	<b>Enable Object Mode:</b> Allows you to view or add a device or object (to add an object you will still need to click the Add Object button below)
	<b>Add a Device or Object:</b> Add an object; enabled when the Object Mode button is clicked
	<b>Enable Areas Mode:</b> Allows you to view or add an area (to add an area you will still need to click the Add Area button below)
	<b>Add an Area:</b> Add an area; enabled when the Area Mode button is clicked
	<b>Sectors Mode:</b> Allows you to view or add a sector (to add a sector you will still need to click the Add Sector button below)
	<b>Add a Sector:</b> Add a sector; enabled when Sector Mode button is clicked
	<b>Show Field of Views</b>
	<b>Add Field of Views</b>
	<b>Home</b>

Button	Function
	<b>Video Route</b>
	<b>Add Video Route</b>
	<b>Delete Video Route</b>
Plans: Plan B - Outer Are ▾	<b>Plan-select menu</b>
	<b>Add a Plan</b>
	<b>Remove a Plan:</b> Delete whichever Plan is highlighted in layer drop-down menu
Layers: 51 - Area ▾	<b>Layer-select menu</b>
	<b>Add a Layer</b>
	<b>Delete Selected Layer:</b> Delete whichever layer is highlighted in layer drop-down menu
	<b>Edit Selected Layer:</b> Edit whichever layer is highlighted in layer drop-down menu
	<b>Back:</b> When navigating through linked layers/plans, this button takes you back one layer/plan (similar to back-navigation controls in a web browser). Note: This functionality is cached and therefore only remembered per logon session.
	<b>Forward:</b> When navigating through linked layers/plans, this button takes you forward one layer/plan (similar to forward-navigation controls in a web browser). Note: This functionality is cached and

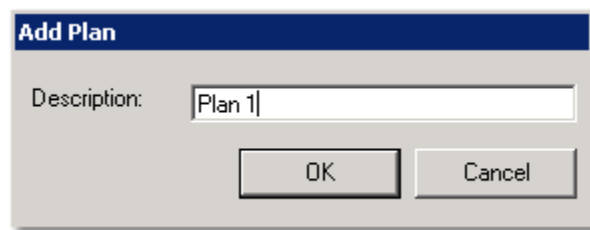
Button	Function
	therefore only remembered per logon session.

## Adding a Plan

1. To add a Plan, select the **Plans** radio button from the *Jump To* menu and then go into Edit mode (click the **Edit** button at the top of the screen).
2. Click the **Add Plan** button on the Plan Toolbar.



3. Provide a **Description**, or name, for the Plan.



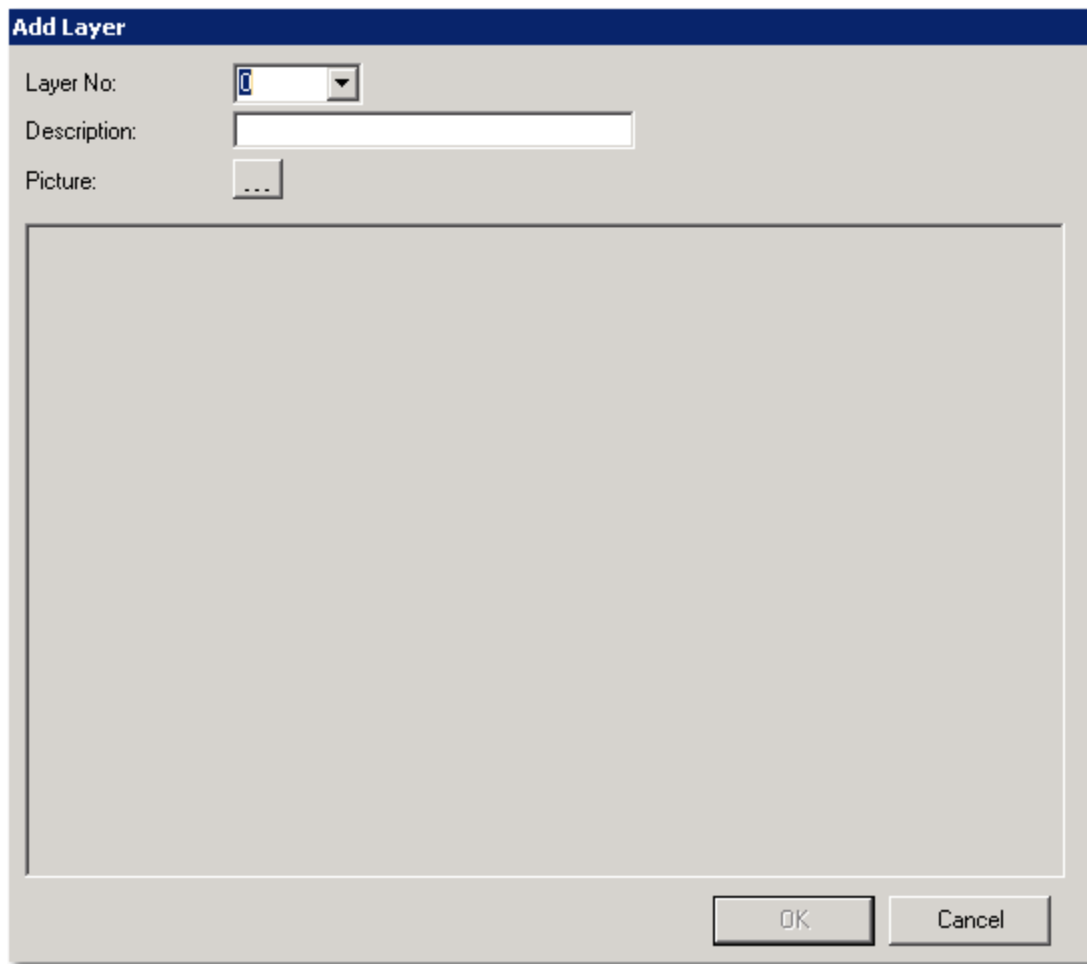
4. Click **OK**. The Plan has now been created.

## Adding Layers to a Plan

1. To add a layer to this plan, click the **Add Layer** button to bring up the **Add Layer** window.



2. Choose a Layer number, add a description and then browse to find your plan picture using the ellipses button (...). Once you have chosen your picture click **OK**.



3. Add as many plans as you wish and then click the **Save** button on top when you are done.
4. If you need to delete a plan, go into Edit mode. Select it from the drop-down menu and click the **Delete Plan** button.



Delete Plan button

5. When you are finished, click the **Save** button at the top of the screen.

## Adding a Device

1. To add a device, select the **Plans** radio button from the *Jump To* menu and then go into Edit mode (click the **Edit** button at top of the screen). Click the **Objects Mode** button on the Plan Toolbar.



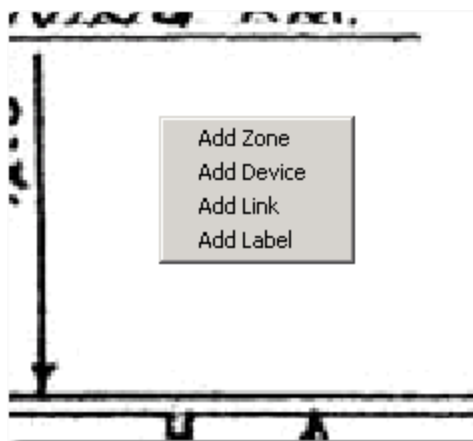
Objects Mode  
button

2. Click the **Add Object** button.



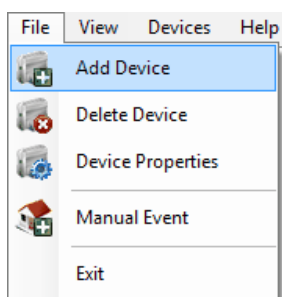
Add Object button

3. Find the area of the layer where the item should be placed, then left-click. A new context-menu will appear.



Device Placement menu

4. Select **Add Device** and a new window will appear.



Add Device menu

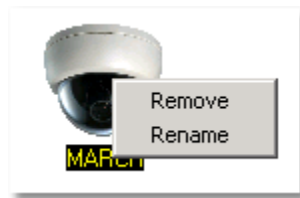
5. To size device icons, select the appropriate size from the **Size** drop-down menu.



Device Icon Size menu

*The smaller the pixel count, the smaller the on-screen icon, and vice versa.*

6. Choose the device on the right, then click the **Add** button. The object added will now appear in the layer.
  - To move it, drag and drop it as needed.
  - To delete it, right-click the image and choose **Remove**.
  - To rename it, right-click it and choose **Rename**.



Remove/Rename menu

7. Add as many devices as preferred.
8. Once completed, click the **Save** button at the top of the screen.

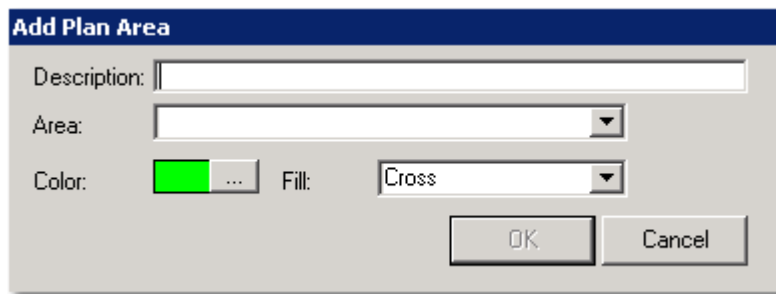
## Adding an Area

1. To add an area, select the **Plans** radio button on the *Jump To* menu and then go into Edit mode (click the **Edit** button at the top of the screen). Then click the **Areas Mode** button on the Plan Toolbar.

Areas Mode  
button

2. Click the **Add Area** button.
3. Left-click in a relevant point within the layer to bring up the **Add Plan Area** window.

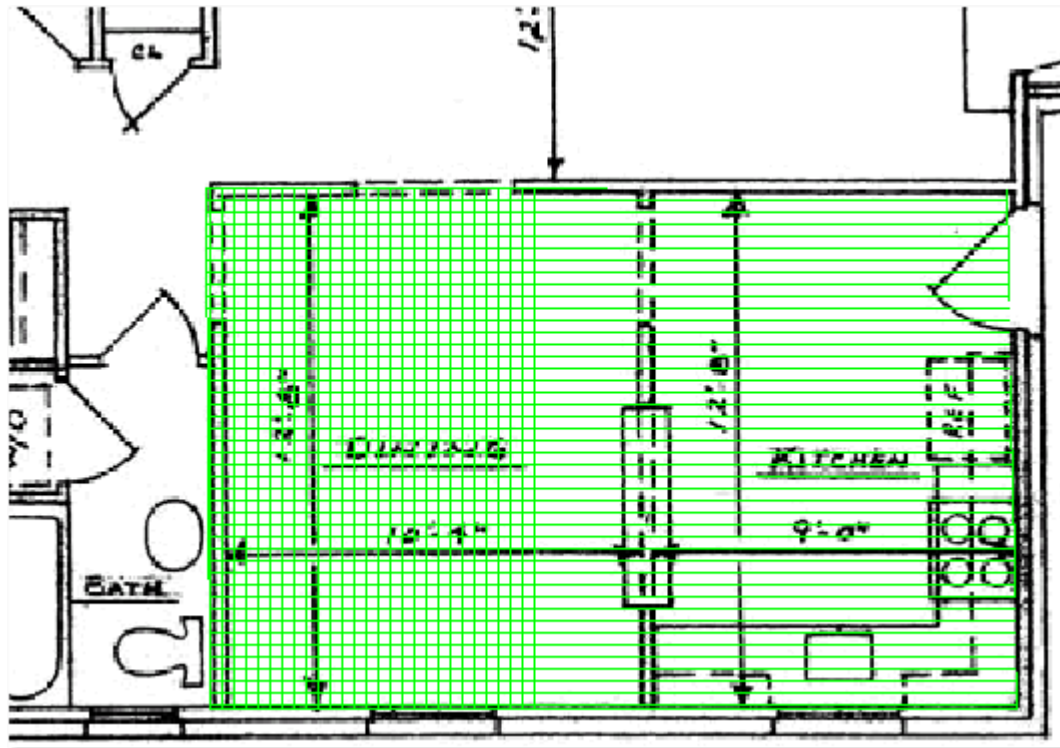




4. Input a **Description** and choose an **Area**.
5. If preferred, change the default **Color**.

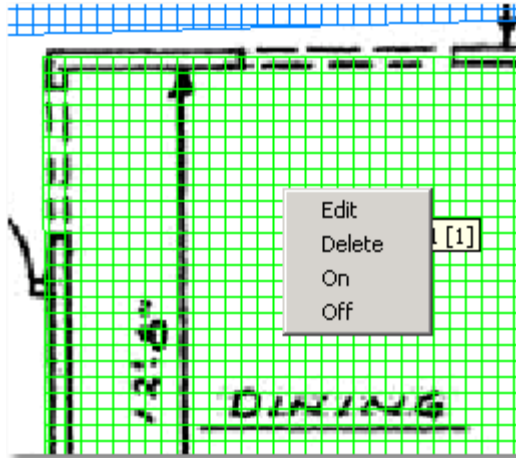
*✎ You cannot use the color red for the fill, as that is used to show an area in-alarm (i.e., there would be no way to distinguish between alarm/incident and normal activity).*

6. The **Fill** field specifies how the area will be displayed. For instance, "Cross" is like cross-hatching, as seen below in green.



7. Click **OK**. Begin drawing the area by moving the mouse and left-clicking to define a point. Keep left-clicking points on the layer until the complete area/boundary has been established. To finish the rendering, simply right-click. This finishes the area drawing and fills in the area with whatever fill (color and style) defined in the previous step.

8. Define as many areas as preferred based on availability within the account and then click the **Save** button on top when you are done.
9. If you need to delete an area, go back into Edit mode. Click the **Area Mode** button (as seen in the beginning steps). Right-click the area you wish to delete and then select the **Delete** Option. When prompted, click **Yes** to delete the sector. Then click the **Save** button on the top.
10. When right-clicking the area, additional options appear.



- The **Edit** option allows changes to the area definition.
- **Delete** removes the defined area.
- Selecting **On** turns the area on; selecting **Off** turns that area off.

11. When finished, click the **Save** button at the top of the screen.

## Adding a Sector

1. To add a sector, select the **Plans** radio button on the *Jump To* menu and then go into Edit mode (click the **Edit** button at the top of the screen). Then click the **Sectors Mode** button on the bottom of the interface.



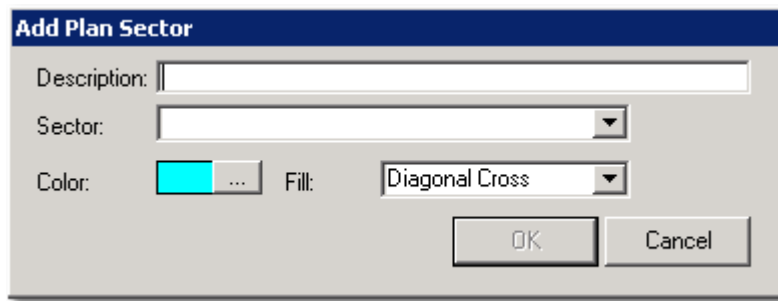
Sectors Mode button

2. Click the **Add Sector** button.



Add Sector button

3. Left-click at the preferred location to begin adding the sector within the layer. The *Add Plan Sector* window will appear.


The image shows a dialog box titled "Add Plan Sector". It has a blue header bar with the title in white. Below the header, there are three input fields: "Description:" followed by a text box, "Sector:" followed by a dropdown menu, and "Color:" followed by a color selection button (a small cyan square with a "...") and a "Fill:" dropdown menu. The "Fill:" dropdown is currently set to "Diagonal Cross". At the bottom right of the dialog are two buttons: "OK" and "Cancel".

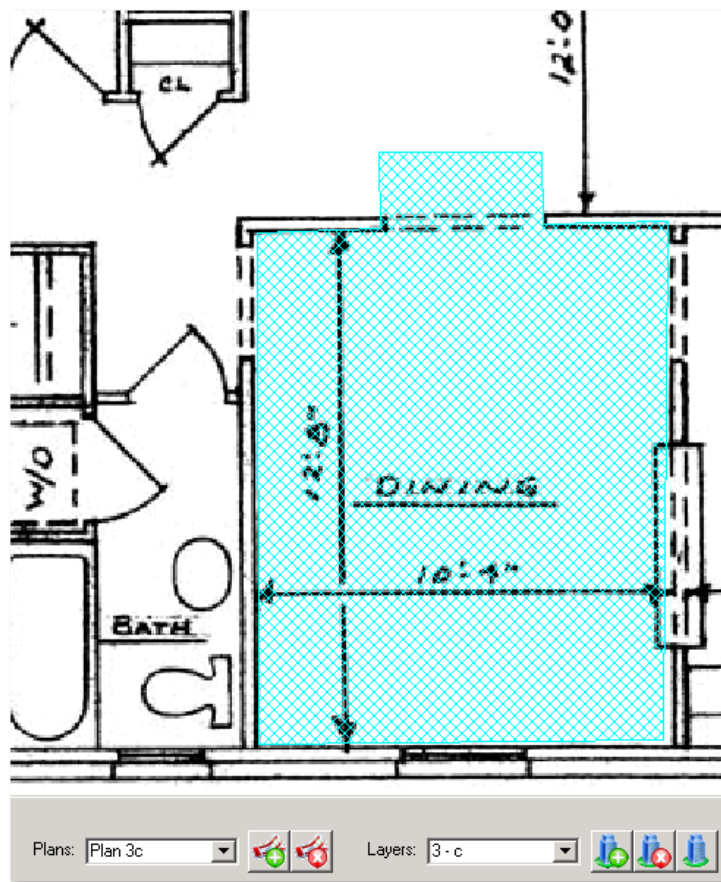
**Add Plan Sector**

Description:

Sector:

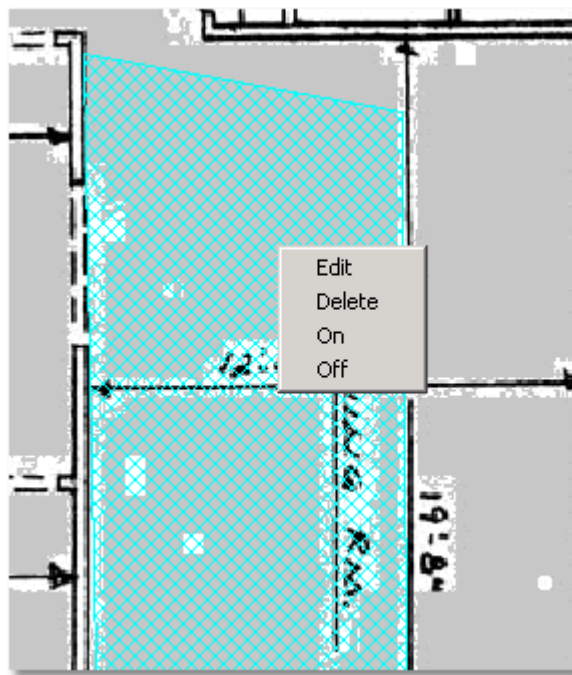
Color:  Fill:

4. Input a **Description** and choose an **Area**.
5. If preferred, change the default **Color**.
  -  *You cannot use the color red for the fill, as that is used to show an area in-alarm (i. e., there would be no way to distinguish between alarm/incident and normal activity).*
6. The **Fill** field specifies how the area will be displayed. For instance, "Diagonal Cross" is like cross-hatching, as seen below in blue.



Defined Sector, "Diagonal Cross" filled

7. Click **OK**. Begin drawing the sector by moving the mouse and left-clicking to define a point. Keep left-clicking points on the layer until the complete sector/boundary has been established. To finish the rendering, simply right-click. This finishes the sector drawing and fills in the sector with whatever fill (color and style) defined in the previous step.
8. Define as many sectors as preferred based on availability within the account and then click the **Save** button on top when you are done.
9. When right-clicking the sector, additional options appear.



Defined Sector options


- The **Edit** option allows changes to the area definition.
- **Delete** removes the defined area.
- Selecting **On** turns the area on; selecting **Off** turns that area off.

10. When you are finished, click the **Save** button at the top of the screen.

## Linked Views

Manitou CS 2.0.0 can link multiple Plan Layers together. For instance, if 2 floor plans exist for a 2-story building, a graphical icon can be inserted into one plan that links to the other. This allows Operators the ability to quickly switch between each plan with a single mouse-click.

Manitou CS also has an assortment of icons available including arrows. Using an 'up' arrow, for instance, on a staircase could graphically indicate the ability to drill up or down to another layer or plan. When an Operator clicks this arrow, s/he will be connected to that other plan. When the user hovers over it, a quick graphical summary will also reveal the linked plan.

 *Linking can be done in whatever fashion makes the most sense to an organization; this above description is only one example of how linking can be used.*

## Linking Setup

1. Go into Edit mode (click the **Edit** button at the top of the screen). Then click the

**Objects Mode** button on the Plan Toolbar.



- Click the **Add Object** button.



- Hover over the area of the plan where a link is to be placed. Left-click and choose **Add Link** from the pop-up menu.
- The *Add Link* window will appear.
- Choose an icon from the list of *Available Icons* on the right hand side and then select the **Size** from the bottom drop-down menu.




- Select the plan needing to be linked from the left-hand side of the screen.
- Define as many linked areas as preferred and click the **Save** button on top when you are done.
  - While in Edit mode, it is possible to **Goto** the linked-plan, **Remove** it, or **Rename** it simply by right-clicking the icon.
  - To move the icon, simply drag and drop it to another place (while still in Edit mode).
- When finished, click the **Save** button at the top of the screen.

## Accessing Plans During an Alarm


When an account is in-alarm any assigned plans may be viewed by clicking on the *Plans* tab, at the bottom of the *Alarm Handling* screen:

Operations Service Do Actions


**Customer Info**

 **0808 - Samuel Morse**  
 427 W. Code St  
 Charlestown  
 MA 02129  
 Cross Street: N/A  
 Subdivision: N/A

**Alarm Info**

 **Unknown Event**  
 Priority: 4 Time: 08/30/2011 16:20  
 System: 1 - 1  
 Tx: 1 - 1  
 Area: 51 - Secret

**Customer Logs**

 ☒ Week ☐ Month [More](#)

Date	Time	Log Description	User ID
08/30/2011	16:20:54	Unknown Event (") (System: 1 Area: 51) (Manual Alarm) RL: 99 TX-ID: 1296314 Key: ""	
	16:20:58	Viewed - Response [4 Secs]	BOLD
08/30/2011	16:05:12	Unknown Event (") (System: 1) (Manual Alarm) RL: 99 TX-ID: 1296314 Key: "" - Closed 16:10	BOLD
	16:05:16	Viewed - Response [4 Secs]	BOLD
	16:05:47	Workflow "808" for Customer 82; Action: "Wait"	BOLD
	16:06:24	Workflow "808" for Customer 82; Action: "Validate Password"	BOLD
	16:10:40	Workflow "808" for Customer 82; Action: "Workflow Component 1"	BOLD
	16:10:48	Workflow "808" for Customer 82; Action: "Workflow Component 1"	BOLD
	16:10:50	Close	BOLD
	16:10:50	Resolution: No Resolution Code Given - Genuine Alarm	BOLD
08/30/2011	16:02:59	Unknown Event (") (System: 1) (Manual Alarm) RL: 99 TX-ID: 1296314 Key: "" - Closed 16:05	BOLD
	16:03:02	Viewed - Response [3 Secs]	BOLD
	16:03:07	Workflow "808" for Customer 82; Action: "Wait"	BOLD
	16:03:56	Workflow "808" for Customer 82; Action: "Validate Password"	BOLD
	16:04:15	Workflow "808" for Customer 82; Action: "Workflow Component 1"	BOLD
	16:04:17	Workflow "808" for Customer 82; Action: "Workflow Component 1"	BOLD
	16:05:03	Close - Res: C	BOLD
	16:05:03	Comment - a	BOLD
	16:05:03	Resolution: C - Genuine Alarm	BOLD
08/30/2011	15:54:39	Unknown Event (") (System: 1) (Manual Alarm) RL: 99 TX-ID: 1296314 Key: "" - Closed 15:59	BOLD
	15:55:11	Viewed - Response [32 Secs]	BOLD
	15:58:05	Workflow "808" for Customer 82; Action: "Wait"	BOLD
	15:58:32	Workflow "808" for Customer 82; Action: "Wait"	BOLD
	15:59:55	Close	BOLD

**Action Pattern - 8008**

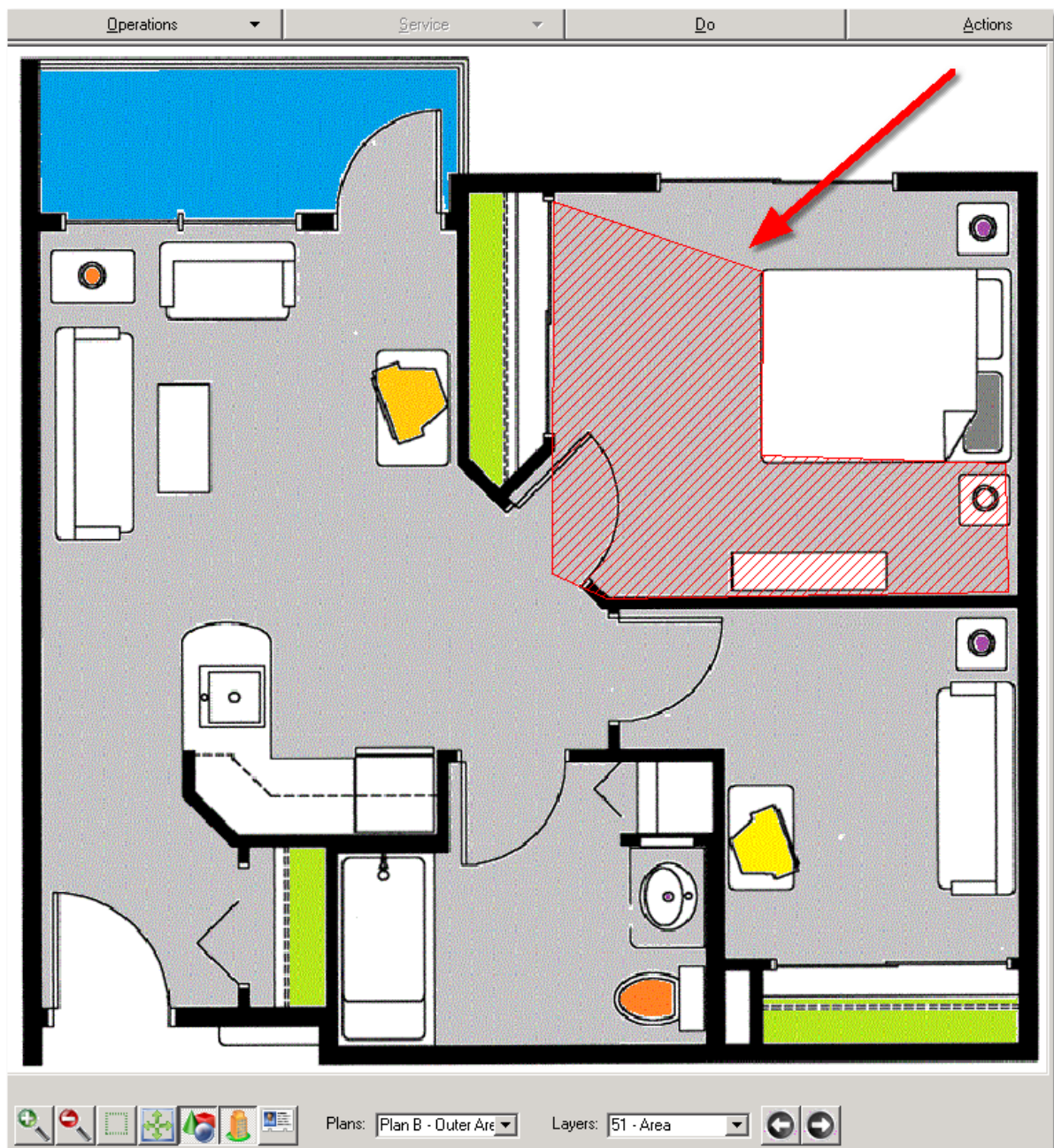
☒ Action Pattern ☐ View All Contacts ☐ View All Call Lists

	Action
0	RUN 'SAMUEL MORSE' WORKFLOW '808'

Alarm - **Plans - 2** Schedule - 3 Alarm Report - 4 Comments - 5 Zone Status - 6 Reverse Channel - 7 Service Tickets - 8 User Defined - 9

If an area is in alarm (and has been defined in the account's plan) it will be highlighted in a red color, similar to the following depiction.





Area in alarm



## User Defined

The User Defined option is for the specific use of individual central stations. Within the Supervisor Workstation, User Defined fields may be added to store additional necessary information about the customer. Examples of this additional information might be salesperson information or internal accounting information.

1. With the screen in Edit mode, enter data into the fields on this screen. 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.
2. Review all changes to ensure the accuracy of the information changed or added then **Save** the record.
3. Enter any notes, if necessary, and click **OK**.

## On Test

The *On Test* form on the customer record provides the Operator with a display of all on test entries for this particular account that are on record in the Manitou system. This display is a read-only screen.


Select the **On Test Status** from the *Operations* menu. The *On Test Status* screen will appear.

On Test Status screen

The following information is displayed:

- **Customer ID** - the customer's Contract Number
- **Name** - the customer's or company's Name
- **Type** - the Type of On Test period - Temporary or Permanent
- **From** - the beginning date and time of the On Test period
- **To** - the ending date and time of the On Test Period
- **Details** - information about which parts of the system are On Test (or "Whole System")

Current On Test accounts are shown in red, while expired accounts are shown in grey; future On Test accounts are displayed in green.

To refresh the list, click on the **Refresh** button. 

## Dealer

The Dealer form allows the user to create and maintain a database of Dealers that the central station may need to contact or call out in the event of an alarm or other emergency. Dealers, once created, may also be added to Action Patterns and call lists as needed.

In addition, deleting an inactive dealer will provide a dialog to delete all customers of the dealer as well as the dealer itself.

Please refer to the related subtopics on the Contents tab.

### Create a Dealer Record

1. Select **Dealer** from the *Maintenance* menu or press **<F10>** on the keyboard.
2. Click on the **New** button located at the top of the screen. An *Add Dealer* box will appear.



The image shows a dialog box titled "Add Dealer". It contains several input fields and dropdown menus. The fields are: Dealer ID (text box), Name (text box), Type (dropdown menu), A/R Company (dropdown menu), A/R Number (text box with a search icon), Country (dropdown menu showing "United States of America"), Language (dropdown menu showing "English (United States)"), and Time Zone (dropdown menu showing "Mountain Time (US & Canada)"). At the bottom right are "OK" and "Cancel" buttons.

Add Dealer dialog box

3. Enter a unique ID into the **Dealer ID** field. Dealer IDs are specific to central station standards.
4. Enter the **Name** of the Dealer.
5. Select the **Type** of Dealer from the drop-down menu.

6. Identify the **A/R Company** and **A/R Number** associated with the Dealer, if applicable.
7. Select the **Country**, **Language** and **Time Zone** from the drop-down menus.
8. Click **OK**. The system will return to the *Dealer Contact* form.
9. Enter the address, city, state and zip code into the appropriate *Address* fields.
10. In the *Contact* section, enter the Dealer phone numbers into the appropriate fields.
11. Enter an **E-mail** address, if applicable.
12. Enter a **Web Address**, if applicable.

## Dealer Options

1. Click the **Options** Tab and put the screen in **Edit** mode. The *Dealer Options* screen will appear.

Dealer Options

☐ Allow Customers/Customer Contacts to put jobs on test?

Monitoring Group: Falcon

Third-Party Billing

A/R Company:

A/R Number:

Time Format

Default

Email Address To Use When Sending Reports

Dealer Options form

2. If Customers are allowed to take jobs on test, click the **Allow Customers/Customer Contacts to put jobs on test** check box. This would allow the customer to be able to put their account on test in the event that the customer would like to test their service.
3. Select the **Monitoring Group** from the drop-down menu.
4. Designate the **A/R Company** and **Number**, if applicable, in the *Third-Party Billing*

section.

5. Select whether the time format will be **12-** or **24-hour** in the *Time Format* section.
6. Provide an **E-mail** address for reports, if necessary.
7. Review each item for accuracy.
8. Click **Save** or click on another tab to continue editing this Dealer record.

## Dealer Contact List

The *Dealer Contact List* contains contact information for Dealers and related contacts.

Dealer Record

1. On the *Main Contact* screen, ensure that the form is either in New or Edit mode by clicking on the **New** or **Edit** buttons at the top of the screen if necessary.
2. Click on the **Add** button. An *Add Keyholder* window will appear.

**Add Keyholder**

☒ Keyholder ☐ Global Keyholder


Name:


Country:


Language:


Time Zone:

Contact

 Site  

Home  

Business  

Mobile  

OK Cancel

Add Keyholder form

3. Select whether the contact is a **Keyholder** or **Global Keyholder**.
4. Enter the name of the contact into the **Name** field.
5. Select the **Country**, **Language**, and **Time Zone** of the contact.
6. Enter the Contact's phone numbers.
7. Click **OK**.
8. Back at the main screen, enter a **Title** and/or **Suffix** for the contact.
9. Enter the **Job Title** of the contact.
10. Select the **Birthday** of the contact from the calendar.
11. To add a picture for the contact, right click on the gray box located to the right of the Contact's information. Select **Find**, and choose a picture file.
12. Select the **Access** permissions for this Dealer.
13. Enter a **Password**, **Web Access ID**, **Web Profile**, and/or **VRT ID** into the appropriate fields.
14. Enter a maximum amount of test time a Dealer may put an account on test.
15. If applicable, click or tab into the **Valid From** and **To** fields and use the drop-down arrow to select a date from the calendar.
16. If the Contact will be inactive for a period of time, indicate that with the **Inactive From**

and **To** fields. Use the drop-down arrows to select dates from the calendar for each field.


### Contact Details Tab

1. Click the *House* tab on the right side of the *Dealer Contact* form.
2. Use the drop-down arrow located to the left of the top telephone number field to select a telephone number type from the list.
3. Click the **notepad** icon to the left of the first telephone number field and select **Properties**.
4. Enter the area code, phone number and extension (if applicable) into the fields available.
5. Click into the **E-mail** address field and type in the entire Email address. If there is more than one email address, use the down arrow to the left of the field to select to enter an additional one or two email addresses.
6. Tab or click into the **Web Address** field. Manitou automatically copies the text after the @ symbol in the Email address and adds 'www' to auto-fill the Web address. By default the Web address is highlighted for removal or overwriting. If there is no Web address delete the entry. If a different URL is necessary, enter the correct Web address.
7. Use the drop-down arrow to the left of the House icon in the *Address* section and select an address type. Designate whether or not this is also the **Mailing Address** as well.
8. Enter the **Zip** code.
9. Enter the **City** name.
10. Click or Tab into the **Street 1** field and enter the first line of address information for this Contact. Enter any additional address or suite information in to the **Street 2** field.
11. Enter the **Country** and select **Locale** and **Time Zone** in the *Location* section.

### Notes Tab

1. Click the *Note Pad* tab on the right of the *Dealer Contact* form to open the *Notes* screen.
2. Enter any notes that pertain to the Contact.
3. Save the record or click on another tab to enter more Dealer information.

### Add a secondary Dealer associated with the Main Dealer record

1. Click the Dealer in the *Contact List* navigator on the left side of the screen.
2. Click the **Add** button above the *Contact List*.
3. In the *Add Dealer* window enter the **Dealer Contract Number** OR use the **Search** button  to find the Dealer. The Name will auto-fill based on the Contract No.
4. Verify the selection is correct then click **OK**.
5. Set the **Valid** and **Inactive** dates using the drop-down arrows to the right of the fields to select dates from the calendar.
6. Click the *House* tab to the right of the *Application View*.
7. All information should be defaulted into their applicable fields. Most of the Dealer Contact record is not editable because it is a pre-existing record. If changes need to be made they should be made to the dealer record itself - not through this Contact interface.
8. Click the *Notepad* tab to the right of the *Application View*. Enter any **Notes** about this Dealer Contact as pertaining to the Dealer record.
9. Review all additions to ensure the accuracy of the information added, click **Save**, enter any notes if necessary and click **OK**.
10. Alternately, click on another tab to continue editing this Dealer record.

## Web Membership

If the Dealer has a licensed, installed version of BoldNet, the User Accounts can be added and managed within the *Web Membership* tab.

- Within this form, a User Account may be **Added**, **Edit**, **Locked/Unlocked** and **Removed** using the buttons located on the left-hand side of the screen.

## Dealer Call Lists

*Call Lists* for Dealers 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.

1. Select **Call Lists** from the Dealer *Jump To* menu. The *Call List* screen will appear.

Dealer Call List


- Click on the **Add** button. An *Add Call List* window will appear.

Type	Contacts	R1
Keyholder	Jim Smith	2
Keyholder	Jeff Taylor	1
Keyholder	Fred Jones	3
Keyholder	BOBB - Bob Bishop	
Dealer	BOLD - Bold Complex	
Authority	CSPD - Colorado Springs Police	
Authority	CSFD - Colorado Springs Fire	
Authority	CSMD - Colorado Springs Medical	
Customer	1003 - Bold Towers	

Add Call Lists

- Enter the Call List **Name** or code into the first field (4 character limit, any characters). This name or code should be determined by the central station administrator.
- Tab into the **Description** field and enter a short description of the Call List (35 character limit).




5. Select the Type from the drop-down menu in the field. If the list is a Main Call List, select **Main**. If it is a Sub List of a Main list, select **Sub List**.
6. Click **Add to Matrix**. The Call List will be added to the Customer's account and a Main column will be added to the *Member Matrix* table.
7. Select whether to **Display Contact Points** in the Call List.
8. Click **OK**.
9. Back at the *Call List* form, select the item or items from the Contacts list that should appear in the Call List. Contacts appearing in the list should be previously added in the [Contacts form](#) of the Customer Record.
10. Move the Contacts to and from the Call List by clicking on appropriate directional arrows.
11. Move list items up and down based on priority by clicking on the up/down arrows to the right of the Call List.  
  
 *Clicking on the contact's phone number or e-mail address and adding it to the Call List will only add that specific number or e-mail to the Call List. Select the contact's name and adding it to the Call List will add all contacts available for that Contact (varying phone numbers, e-mail, fax, etc.) Select only the specific phone number to add to the list if only one number should be contacted. If all forms of contact should be used, select the Contact's name, and add it to the list.*
12. If the Call List rotates, check the **Rotation List Active** checkbox. The contact at the top of the list will automatically be the head of the list, indicated by an icon that appears when the Rotation List Active checkbox is checked. This contact will be first in rotation.
13. Indicate the **Next Rotation** date by selecting the correct date from the calendar. The start date defaults to the current day.
14. Set the rotation **Interval** by clicking on the up/down arrows to set the number of days each rotation is active before rotating.
15. If a Contact on the list is a **Must Contact** or **Does Not Rotate**, select the appropriate Contact and check the applicable boxes.
16. Once all data is entered, click **Save**.

## Dealer Attentions

Dealer Attentions are used for the sole purpose of printing and mailing paper copies of reports run through Manitou. If an Attention is entered, Manitou will print that attention prior to printing out the physical address of the recipient.

Attentions



Attention Type	Contact
Invoice	
Mailing	
Reporting	
Shipping	

Attentions form

1. Verify the Attentions form is in "New" mode or if making changes, click on the **Edit** button to put the screen into edit mode.
2. Click in the appropriate field.
3. Select the contact from the drop-down menu.

 For Contacts to appear, they must first be entered into the [Contact List](#).


4. Click **Save**.

## Dealer TX Types

The *Dealer Transmitter Types* tab allows the selection and removal of all Transmitters the Dealer services. The list under Available Transmitters displays all of the Transmitters entered into Manitou.

1. With the screen in Edit mode click the *Transmitter* tab, located at the bottom of the Application View. The *Dealer Transmitter Types* screen displays two columns. The *Available Transmitters* are on the left and the *Selected Transmitters* are on the right.

Transmitter Types



Available Transmitter Types:

TX Type	Description
DEF	Default Transmitter Type
DEF2	Default Transmitter for ...
ITI1	ITI Caretaker
REDC	Red Care
SIA	Radionics SIA
SIA2	SIA2
sia3	sia3
SW	southwest test
V1K	VertX V1000
V2K	VertX V2000
VERT	VertX

Selected Transmitter Types:

TX Type	Description
DSCA	DSC on ACID

>

<

>>

<<

2. To add to the list of this *Dealer's Selected Transmitters*, click to highlight a transmitter

in the *Available Transmitters* list in the left column and click either the ">" to move one at a time, or the ">>" to move all the control panels to the *Selected Transmitters* list on the right.

3. Use the "<" and "<<" arrows to remove panels from the *Selected* column and return them to the *Available* column.
4. Review all the items and click the **Save** button.

For more information on transmitters, see [Transmitter Types](#).

## Dealer TX ID Ranges

*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 ID) within a particular Dealer's range it is clear that the signal is from one of that Dealer's accounts. This gives the Operator more information when handling alarms.

### Add Transmitter Ranges

1. Open a Dealer account to add Transmitter Range information.
2. Click the *TX Ranges* tab and put the screen into Edit mode.

	Rec. Line Designation	TX ID From	TX ID To	Next TX ID	TX ID Type	Range Full	Restart
▶	RL Prefix ID	0	9999	151	Decimal	<input type="checkbox"/>	<input type="checkbox"/>
	RL 100	10000	11000	10031	Hex (Include A)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	RL 101	11001	11999	11031	Hex (Exclude A)	<input type="checkbox"/>	<input type="checkbox"/>

3. Tab or Click into the Receiver Line Designation cell at the upper left.
4. Use the drop-down arrow at the right of the Receiver Line Designation cell and select the applicable Receiver Line from the listing. This information should be available from the Administrator or Manager of the central station. It is important to know which Customers and Dealers are assigned to which Receivers and RLDs.
5. Tab into the **TX ID** (Transmitter ID) **From** field and enter the starting number of the TX Range.
6. Tab into the **TX ID To** field and enter the ending number of the TX Range.
7. Tab into the **Next TX ID** field and enter the next Transmitter ID to use for this Dealer record.

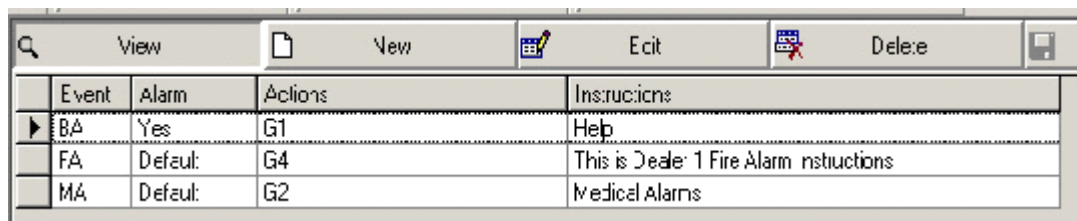
8. Tab into the **TX ID Type** field and use the drop-down arrow to indicate the format of the Transmitter ID (Decimal, Hex (Include A), Hex (Exclude A)). This is based on the TX ID format used by your central station and/or that Dealer.
9. Tab into the **Range Full** field and click the checkbox if the Transmitter ID range is full at this time. This is sometimes used to block out a particular number of transmitter ID's to be utilized by a specific account.
10. Tab into the **Restart** cell and click the checkbox if, once completely through the list of ranges, it is okay to start again looking for empty Transmitter ID numbers.
11. Repeat this process for all Transmitter Ranges allowable for the Dealer.
12. Review all entries to ensure the accuracy of the information and Save the record. Enter any notes if necessary then click **OK**.
13. Alternately, click on another tab to continue editing this Dealer record.

## Dealer Programming

The Dealer Programming section within the Dealer interface contains all the Dealer-level items that trigger Action Patterns. This is a simpler interface than the Programming Screen associated with Customer records because Dealer Programming only deals with Action Patterns, not signal reassignment.

### Add Programming

1. Open the Dealer Form by clicking the **Dealers** shortcut on the button toolbar or *Maintenance* pull-down menu then **Dealer**.
2. Input the Dealer ID or click the **Search** icon to locate the Dealer and open the dealer's information.
3. Click the **Edit** Button located at the top of the Application View.
4. Click the *Event Programming* tab located at the bottom of the Application View.



Event	Alarm	Actions	Instructions
BA	Yes	G1	Help
FA	Default:	G4	This is Dealer 1 Fire Alarm instructions
MA	Default:	G2	Medical Alarms

5. Click into the top left empty cell and use the drop-down arrow to the right of the *Event* cell to select an Event Code from the list.
6. The Description cell will fill automatically based on the Event Code selected. Tab into

the *Alarm* cell and use the drop-down arrow to the right to select the applicable value for Alarm. This tells the system whether or not this Event will trigger an alarm or just show up in the log as a signal. The **Default** value tells the system to treat the event as whatever the system default is. For example, a **BA** would always be an Alarm unless otherwise defined; so, left at **Default** value BA continues to always trigger an alarm. Change the value to **No** and **BA** will only be logged as a signal instead of being displayed and handled as an alarm.

7. Tab into the *Actions* cell and use the drop-down arrow to the right of the cell to select the applicable **Action Pattern - Global** or **Dealer level Action Patterns** will be available in the list.
8. Tab into the Instructions cell, click the ellipses [...] button and enter specific instructions for the Event into the text-entry window.
9. Click **OK**. The instructions appear in the Help cell.
10. Review all changes to ensure the accuracy of the information and **Save** the Programming. If entering many lines of programming, Save after every few entries to avoid losing data.
11. Enter any notes if necessary then click **OK**.

## Dealer Comments

The Dealer Comments area allows users to view, enter, or edit temporary, current, future, and special instruction for a customer. The Comment area also offers users access to view expired comments about a customer.

The screenshot shows a software interface for adding comments. On the left is a tree view with categories: Temporary, Expired, Current, Future, Standing, test, test1, and Special Instructions. The 'test' category is selected. At the top are buttons for 'Add', 'Remove', and 'Refresh'. The main area is titled 'Comment' and contains a 'Description' field with the text 'test'. Below this is a 'Show On Open' section with a list of checkboxes: Alarm, Test, Pre-Cancel, Maintenance, Paged Contacts, Temporary Comments, and Temporary Schedules. To the right of this list is an 'Auto-Client' dropdown menu set to 'Ignore Comment'. At the bottom is a large text area for the comment, which contains the text: 'John is on vacation starting August 7, 2008 and will return August 15.'

Dealer Comment form

## Add A Comment

1. If not already in Edit mode, click the **Edit** button at the top of the screen.
2. Click the **Add** button. The *Add Comments* dialog box appears.

The screenshot shows the 'Add Comment' dialog box. It has a title bar 'Add Comment'. Inside, there is a 'Description' text field. Below it is a 'Comment Type' section with four radio button options: Temporary (selected), Standing, Special Instructions, and In House. At the bottom are 'OK' and 'Cancel' buttons.

Add Comment dialog box

3. Type a **Description** in the field and select the **Comment Type**.
  - **Temporary** - only active for a specified amount of time

- **Standing** - active until removed
  - **Special Instructions** - special instructions or scenarios that apply to the Customer record; active until removed. Special Instructions are created within the Supervisor Workstation.
  - **In House** - only visible to the central station; not available to the Dealer when logged into Manitou remotely.
4. Click **OK**.

Comment

Description: Testing Comment

Show On Open

- ☒ Alarm
- ☐ Test
- ☐ Pre-Cancel
- ☐ Maintenance
- ☐ Paged Contacts
- ☐ Temporary Comments
- ☐ Temporary Schedules

Auto-Client: Operator Must See Alarm

Valid From: 07/08/2012 21:28

Valid To: 07/09/2012 21:27

☐ Auto Purge

Follow Up: 00:00

Comment

Comment form

5. Back at the *Comment* form, select when to show the Comment in the **Show On Open** section.
6. Designate whether the **Auto-Client** should ignore the comment or require the Operator to see it.
7. For Temporary Comments, select a **Valid From** and **To** date, when to **Follow Up** and whether the system should **Auto Purge** the Comment once expired.

8. Type the **Comment** in the window provided.

## Dealer Action Patterns

Dealer Action Patterns speed the processing of specific alarms by telling the Operator who to call and what actions to take on each and every alarm.

Please refer to [Action Patterns: Creating a Dealer Action Pattern](#) for instructional steps.

## Dealer General Schedules

Dealer General Schedules define the availability of Keyholders, schedules, and when the Dealer can put his or her accounts on test.

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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	07:00	08:00				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						

Dealer General Schedules form

1. Click on the **General Schedules** button in the *Jump To* list.
2. Click the **Add** button to bring up the Add Schedule window.

Add Schedule window

3. Enter a Schedule **Code**. This code is limited to 4 characters.
4. Enter a brief Description in the **Description** field.
5. Select the **Type** of Schedule from the drop-down menu.



6. Click **OK**.
7. Check the days of the week this schedule will apply to.
8. Click in the **Start 1** cell and enter the first open time. This number should be in 24-hour time, ie - 1pm = 13:00.
9. Tab into the **End 1** cell and enter the first close time. This number should be in 24-hour time, ie - 10pm = 22:00.
10. Repeat the above process for all additional open and close times.
11. Click **Save**.

### On Test General Schedule

This General Schedule is intended to provide a window during which a Dealer will be allowed to put accounts out of service, assuming he or she is initiating the out of service. This means that if an "On Test" general schedule exists on the Dealer account for 9 a.m. to 5 p.m. on weekdays, and a dealer logs into VRT or BoldNet to put the account on test outside of the schedule, they will not be allowed to. At this point, they will be required to call in to the central station to have an Operator place an account on test. Each dealer account is only allowed a single On Test schedule.

## Dealer Control Panels

Dealer *Control Panels* allows the selection and removal of all panels that the Dealer services.

1. Open the Dealer record and click the **Edit** button located at the top of the Application View.
2. Click the **Control Panels** radio button, located on the *Jump To* menu.

Dealer Control Panels

Available Control Panels:

Panel Type	Description
00612	Radionics 612
00712	Napco 712
00912	Radionics 912
8112	Radionics 8112
SKC	Silent Knight Commander

Selected Control Panels:

Panel Type	Description
------------	-------------

Control Panel Details

Max. Areas: 0 Max. Areas: 0

Max. Transmitters: 0 Max. Transmitters: 0

Max. Zones: 0 Max. Zones: 0

Max. Users: 0 Max. Users: 0

Dealer Control Panels

3. The *Control Panels* form has two columns - the *Available Control Panels* are on the left and the *Selected Control Panels* are on the right.
4. To move a Control Panel from the Available list to the Selected Control Panels list, click to highlight one of the *Available Control Panels* on the left and click either the ">" to move one at a time, or the ">>" to move all the control panels at once.
5. Use the "<" and "<<" arrows to remove one or all panels from the *Selected* column and return them to the *Available* column.
6. Select each Control panel in the *Selected Control Panels* view one-at-a-time and make any changes to the **Maximum Areas, Transmitters, Zones, and/or Users** values. Most often, the defaults should be correct. However, this screen provides the ability to change those values if they differ for some reason.
7. Review all the items within the view then **Save** the changes.

## Reverse Protocols

Reverse Protocols enable Reverse Commands to function properly and are set up within the Supervisor Workstation.

Reverse Command Protocols

Protocol	Is Allowed?	Include Company Defaults?

Reverse Command Protocols

For more information on Reverse Protocols, please see the Facility Supervisor.

## Dealer Reverse Commands

*Reverse Commands* for Dealers can be used to send a command back to a panel to test to see if it is working properly.

View    New    Edit    Delete    Save

Add    Remove

Reverse Channel Command

Type: Honeywell WIN-PAK    Response Type: Delayed

Group: Door (Output)    Response Delay: 30

Command: WEGZ    Command Level: Customer

Description: Energize    Command Detail: None

User Group: Operator

Availability

- ☐ Alarm Only
- ☐ Dealer User Allowed
- ☐ Customer User Allowed
- ☐ Restricted
- ☐ VRT User Allowed
- ☐ Web User Allowed
- ☐ Disabled

Attributes

- ☐ Connect Command
- ☐ Disconnect Command
- ☐ Request Binary Data
- ☐ Retransmission
- ☐ Transmitter Connection Required

Optional Parameters

Field Type	Data Type	Label	Range	DB Value	Default	Format
Database	Integer	Hardware ID	1-65535	Device ID		

Reverse Commands form

For information on Reverse Commands, see [Appendix B - Retransmission: Reverse Commands](#).

## Dealer Reports


From the *Dealer Reports* screen, Users can add and schedule reports to be periodically generated and sent from Manitou to the Dealer.

To setup, manage or print a report, see [Reporting](#).

## Maintenance Issues

The *Maintenance Issues* form is similar to the global *Maintenance Issues* form; however, only maintenance issues for the Dealer are displayed on the local *Maintenance Issues* form. Since only the Dealer's issues are displayed, the filtering tab is not needed.

Additionally, all resolved and unresolved issues are displayed. Adding, editing, and clearing of the issues is similar to the global form, but this functionality is locked out when editing the Dealer since the maintenance issues do not participate in the locking scheme for the Dealer. When editing and saving an entity with outstanding maintenance issues, the Operator is prompted for each issue to determine if it was resolved, and for the Operator to resolve, purge or update the issue.

 *Maintenance lists may be sorted with the exception of the Description and Notes columns.*

- For more on Maintenance Issues, refer to [Alarm Handling Additional Functions: Maintenance Issues](#).
- Once all data is entered, click **Save**.


## Dealer Statistics

Dealer Statistics are a quick and easy to view customer statistics in the Manitou Client or from the Web. The Statistics form is a read-only menu, with the option of drilling down into each statistic for additional information. Users may also select to include Sub Dealers in the statistics. Checking this option will add the Sub Dealer counts to the main Dealer's counts.

Two options control several aspects of the Statistics. The first determines the number of customers to be shown for "Top x" statistics, where x is 1-50. The second controls the number of days of activity to be considered for activity related statistics. Several new statuses are maintained at the customer level. They are "Low Battery", "Late to Test" and "No Event Programming." These can be seen on the Zone Status form of the customer and in the customer status forms.

Users also have the option to select a 24-hour, 48-hour or 72- hour time period to display statistics.

Statistics

 ☒ 24 Hour Inquiry ☐ 48 Hour Inquiry ☐ 72 Hour Inquiry

☒ Include Sub Dealer Statistics

Customer Counts

Active Customers	1
Inactive Customers	0
Pending Customers	0
Deactive Customers	0

Customer Status Summary

Currently In Alarm	0
Currently On Test	0
Dispatched Alarms In The Last 24 Hours	0
New Maintenance Issues	0
Unresolved Maintenance Issues	0
With Expired Permits	0
Watch List	0
Top Alarm Activity Over 30 Days	10
Top False Alarm Activity Over 30 Days	10

Customer Transmitter Summary

Zone In Alarm	0
Zone In Fault	0
In Line Fault	0
With Low Battery	0
With Late-To-Test	0
Missing Event Programming	0
Transmitters Not On File In The Last 24 Hours	0

Dealer Statistics screen

Statistics are provided for the following areas:

### Customer Counts

- **Active Customers** - All active customers for a specific dealer
- **Inactive Customers** - All inactive customers for a specific dealer
- **Pending Customers** - Currently pending customers for the dealer
- **Deactive Customers** - Deactivated customers for the dealer

### Customer Status Summary

- **Currently In Alarm** - All alarms in the Alarm Queue that belong to the specified dealer or sub dealer

- **Currently On Test** - All alarms for the specified dealer or sub dealer that are on test
- **Dispatched Alarms in the Last 24 Hours** - Number of alarms in the last 24 hours for customers belonging to the dealer that authority has been dispatched on
- **New Maintenance Issues** - Number of maintenance issues that have not been modified
- **Unresolved Maintenance Issues** - Number of unresolved maintenance issues for the dealer
- **With Expired Permits** - Number of customers belonging to the dealer with expired authority permits
- **Watch List** - Number of customers on a 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 watched, the watch list is a shortcut to the customer without having to search for the customer each time. Customers may be added to the watch list by simply double-clicking on the Watch List line in the statistics form to bring up the customer Watch List window.

Click on the **Add** button and enter the Customer ID to add to the watch list. Once the customer is added, click **Save**.

Customer ID	Name
-------------	------

- **Top Alarm Activity over 30 Days** - Customer with the most alarm activity over the past 30 days
- **Top False Alarm Activity over 30 Days** - Customer with the most false alarm activity for the past 30 days


## Customer Transmitter Summary

- **Zone In Alarm** - Number of current transmitters with an alarm in the Alarm Queue
- **Zone In Fault**
- **In Line Fault**
- **With Low Battery** - Number of transmitters with a low battery
- **With Late-to-Test** - Number of transmitters showing Late-To-Test signals
- **Missing Event Programming** -Number of transmitters missing event programming
- **Transmitters Not on File in the Last 24 Hours** - Number of customers with no transmitters associated with the account

## Dealer Finish

- Once all forms are entered, click **Save**.

This saves the basic information so that the account can receive signals, display to the address where an event was tripped, dispatch the applicable authority and contact the location.

 *It is a good practice to review the data entry within the Customer Record by clicking the **View** button prior to entering additional data including Contacts, Call Lists, Open/Close Schedules and Comments.*

## Dealer Billing

Dealers can set up billing cycles and charges through OWS. Dealer Billing can be by Class Code or by Monitoring Service billing code, which is entered in the Monitoring Type form within the Supervisor Workstation. Additionally, an Activity-based billing utility for a Dealer is available for Sedona and QuickBooks accounting systems. The amounts are determined by the information entered into the Dealer's *Billing Charges* form. The new system option for billing by Class Code or Monitoring Service billing code will control how the charges are generated for this process.



**Billing Charges**

Item Code: ALRMMON

☐ Time Charge Defined

Time Price:  Time Rate:

Time Unit:

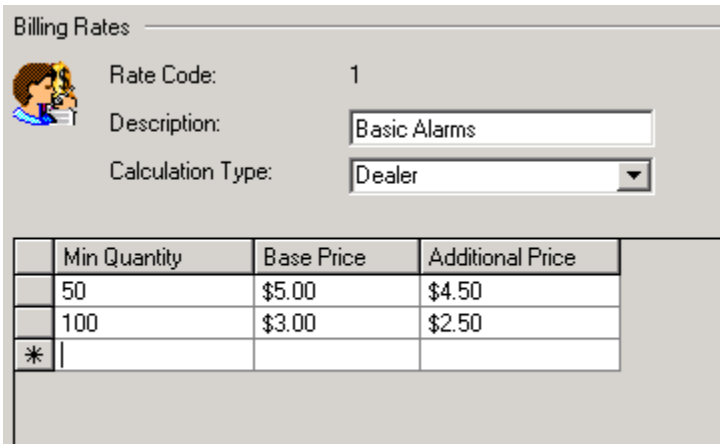
Time Limit:  (total seconds)

Time Increment:  (seconds per incident)

Billing Code:

## Set up Billing Rates

The *Billing Rates* form allows a rate table to be attached to an item price and/or time price. In the [Billing Charges](#) form, these rate tables are used to calculate rates based on certain requirements. For instance, if a service exists for monitoring basic alarms, the monitoring company may create a rate table based on the number of alarms:



**Billing Rates**

Rate Code: 1

Description:

Calculation Type:

	Min Quantity	Base Price	Additional Price
	50	\$5.00	\$4.50
	100	\$3.00	\$2.50
*			

Billing Rates, Basic Alarm example

Here, for 0-50 alarms received, the monitoring company charges a \$5.00 rate. For an alarm count of 51-99 alarms, the rate is \$4.50.

## Dealer and Customer Calculation Types


Dealer and Customer Calculation types will change which rate table is used to calculate charges. For example, if Dealer Dave has two customers, A and B, and Customer A receives 5 signals over the limit in the last month, and Customer B receives 6 signals over the limit. If the rate table associated with the billing charge for those signal overage is using the Dealer Calculation, then all 11 signals would be charged to Dealer Dave at the rate for 11 signals specified in the table. However, if the rate table associated with the billing charge is the



Customer Calculation type, then Dealer Dave would be charged for 5 signals at the rate for 5 signals, and charged for 6 signals at the rate of six signals.

The following rate table is another example of how rate tables may be used:

**Billing Rates**

 Rate Code: 2

Description: False Alarms

Calculation Type: Dealer

	Min Quantity	Base Price	Additional Price
2	2	\$5.00	\$10.00
*			

In this scenario, the monitoring company wishes to assess a fee of \$5.00 for false alarms. When more than two false alarms have been processed, an additional charge of \$10.00 is assessed to the Customer.

## Set up Billing Charges

### Setting Up Billing Charges

1. Click **Billing Charges** from the *Jump To* menu.
2. Put the form in Edit mode by using the **Edit** button at the top of the screen, if necessary.
3. Click the **Add** button above the tree list. Then, select an **Item code** in the *Add Billing Charge* dialog box, and click **OK**.
4. If you want, select the **Charge Defined** checkbox.
5. Enter the **Price** for all active accounts.
6. Enter a **Rate** for all active accounts.
7. Enter the **Price** for all inactive accounts.
8. Enter the **Rate** for all inactive accounts.
9. Enter the Accounting **Billing Code**.
10. Enter the billing **Frequency**.
11. Click **Save**.

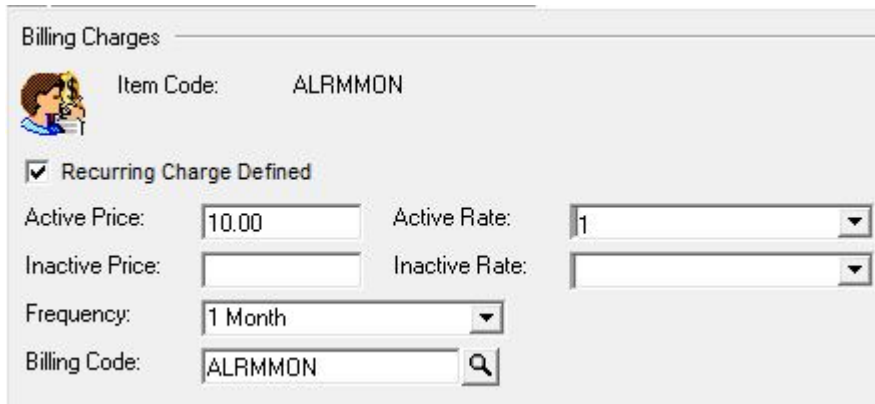
### Types of Billing Charges

Billing Charges may be set up on a **Recurring**, **Add**, **Signal Overage**, or **Time** basis.

#### Recurring

Users may wish to set up a Recurring charge if the service occurs every month. In the

example below, the recurring charges are set up for alarm monitoring.



**Billing Charges**

Item Code: ALRMMON

☒ Recurring Charge Defined

Active Price: 10.00      Active Rate: 1

Inactive Price:      Inactive Rate:

Frequency: 1 Month

Billing Code: ALRMMON

With an active price, a \$10.00 charge is assessed every month for alarm monitoring. Users may change the frequency of the charges (in this example, every month), and also charge for an inactive account. For example, if the account is inactive, but the monitoring company is still monitoring the site, the inactive rate may be applied. Remember, in the Billing Code field, add the Billing Code for the service that is defined in the Monitoring Types form in the Supervisor Workstation. This must also match the billing code in the accounting software.

### Add

An Add charge is added in circumstances where a one-time charge may be applied, such as a setup fee.



**Billing Charges**

Item Code: ALRMMON

☒ Add Charge Defined

Add Price: 300.00      Add Rate: <use price>

Billing Code: SETUP

In the Add Rate drop-down box, use the <use price> option to enter the Add Price manually. Other pre-defined rates may be used, if appropriate.

### Signal Overage

Using the *Billing Charges* form for Signals allows the monitoring company or dealer to bill based on the number of overage signals received in a given time period. Here, users may enter specifications based on the total price, or by signal and alarm price:

Billing Charges

Item Code: ALRMMON

☒ Signal Overage Charge Defined

Total Price:  Total Rate:

Signal Price:  Signal Rate:

Alarm Price:  Alarm Rate:

Total Limit:

Signal Limit:

Alarm Limit:

Billing Code:

In the example above, the monitoring company is choosing to charge customers \$1.00 for every signal that exceeds the limit in a given time period, and \$3.00 for every alarm that exceeds the limit. The Signal and Alarm limits are set, and the Billing Code is entered into the appropriate field. In the Signal Rate and Alarm Rate fields, users can select which rate to use:

Billing Charges

Item Code: ALRMMON

☒ Signal Overage Charge Defined

Total Price:  Total Rate:

Signal Price:  Signal Rate:

Alarm Price:  Alarm Rate:

Total Limit:

Signal Limit:

Alarm Limit:

Billing Code:

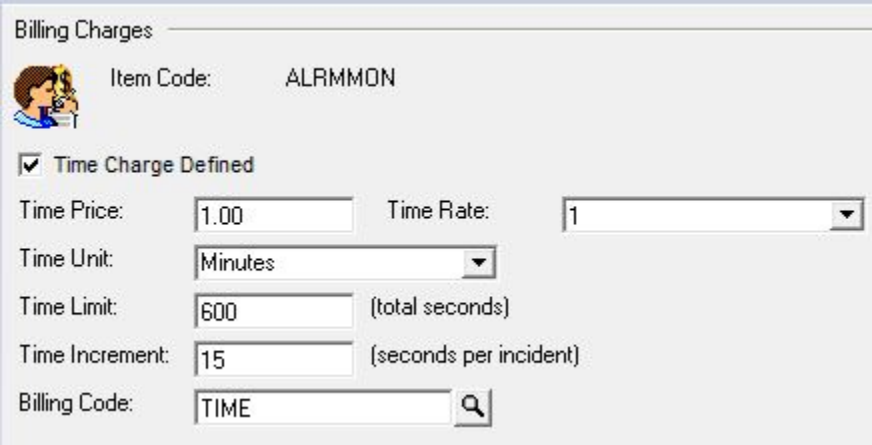
<use price>  
Basic Alarms False Alarms  
2 False Alarms

Selecting **<use price>** will use the price entered into the **Signal Price** and **Alarm Price** fields. Selecting **Basic Alarms** will use the price for basic alarms, and selecting **2 - False Alarms** will use the rate based on false alarms. These rates are determined in the [Billing Rates](#) form.

### Time Charges

Lastly, the *Time Charges* form allows for time-based billing items. In the example below, a time price of \$1.00 is used for every 10 minutes (600 seconds) spent on an alarm. The **Time Increment** value determines the value to which each specific time charge (per signal event)

will be rounded. For example, if the time spent on an alarm is 6 minutes and 45 seconds, the time will be rounded to 7 minutes.



Billing Charges

Item Code: ALRMMON

☒ Time Charge Defined

Time Price: 1.00 Time Rate: 1

Time Unit: Minutes

Time Limit: 600 (total seconds)

Time Increment: 15 (seconds per incident)

Billing Code: TIME

Time-based billing is used in conjunction with soft programming attributes that are attached to event codes. This programming attribute is "q" and can be set in the Supervisor Workstation under *Events > Event Codes*. The signal processing system will recognize the new attribute and set a new flag on the Customer Activity record to indicate that time-based billing is active for the event.

## Crediting an Account

Generally, credits are taken for the portion of the already billed period that is being canceled. For example, if at 10 days into March, a service is canceled, and assuming it was billed through the end of March already (on a monthly frequency), 21 out of 31 days of the total invoiced will be credited. It is the remaining days (not including the day of the change) divided by the total days of that specific period that will be credited. Rate tables have no bearing on credits, as they are used to calculate charges. Actual billed days is used to calculate credits.

## Dealer Reports

The initial Dealer and Third-Party Billing set up is complete. Now, monitoring companies may utilize several report options, including posting the billing to accounting software.

For more on reports within the Manitou system, refer to [Reporting](#).

## Authority

The Authority form allows the user to create and maintain a database of police, fire and other emergency services that the central station might need to contact in the even of an alarm or other emergency. Once created, Authorities may be added to the Action Pattern and call lists for a customer as needed.

## Find an Authority Record

1. Select the **Authority** from the *Maintenance* menu. The *Authority* form will appear.

Authority Record form

2. On the *Authority* form, click the magnifier button to the right of the **Authority ID** field.
3. Select the parameters from the **Search Key** fields and enter the **Values** or use an asterisk (\*) then click the **Search** button.

Authority ID	Full Name	Type	Address 1	City	Region
CSFD	Colorado Springs Fire Department	Fire	1911 Memorial Drive	Colorado Springs	Colorado
CSMD	Colorado Springs Medical Emergency	Medical	511 County Blvd	Colorado Springs	Colorado
CSPD	Colorado Springs Police Department	Police	911 County Road	Colorado Springs	Colorado
GFIRE	Fire Emergency	Fire	Fire 16 04 13	Frankfurt	Germany
GMED	Medical Assistance	Medical	Medical 22 05 34	Frankfurt	Germany
GPOL	Police Authority	Police	Police 12 06 48	Frankfurt	Germany
RCMP	Royal Canadian Mounted Police	Police			
UKFB	UK Fire Brigade	Fire			
UKMED	UK Medical Assistance	Medical			
UKPOLICE	UK Police	Police			
VFD	Vancouver Fire Department	Fire			
VMD	Vancouver Medical Assistance	Medical			

Find Authority Wildcard Search

4. Select the record to load from the search results then click the **Load** button. The selected record will now be displayed.

## Create an Authority Record

1. Select **Authority** from the *Maintenance* menu.
2. Click on the **New** button located at the top of the screen. An *Add Authority* box will appear.

The image shows a software dialog box titled "Add Authority". It contains several input fields and dropdown menus. The fields are: "Authority ID:" with a text box, "Name:" with a text box, "Type:" with a dropdown menu, "Country:" with a dropdown menu showing "United States of America", "Language:" with a dropdown menu showing "English (United States)", and "Time Zone:" with a dropdown menu showing "Mountain Time (US & Canada)". At the bottom right of the dialog box are two buttons: "OK" and "Cancel".

Add Authority dialog box

3. Enter a unique ID into the **Authority ID** field. Authority IDs are specific to central station standards.
4. Enter the **Name** of the Authority.
5. Select the **Type** of Authority from the drop-down menu.
6. Select the **Country**, **Language** and **Time Zone** from the drop-down menus.
7. Click **OK**.
8. Back at the main screen, enter the address information in the *Address* section.
9. In the *Contact* section, enter the Authority phone numbers into the appropriate fields.
10. Enter an **E-mail** address, if applicable.
11. Enter a **Web Address**, if applicable.

## Authority Options

The *Authority Options* section contains additional details on permits, false alarm tracking and dispatch charges. It is important to have this information verified when entering Authority records as it can affect how alarms are handled when an Authority needs to be dispatched.

Authority Options

☐ Permit Required

False Alarm Tracking

☐ Sliding Window (days)  
☒ Calendar Period (months)  
☐ Forever (never resets)

False Alarm Limit: 3

False Alarm Period: 12

False Alarm Starting Month: 2

Dispatch Charges

☐ Charge Code:

Authority Options

1. If a permit is required, check the **Permit Required** box. For more information on Permits, refer to [Add A Customer: Permits](#).
2. Based on the Authority's policies about false alarms, select whether the *False Alarm Tracking* is a **Sliding Window**, **Calendar Period**, or **Forever** (never resets).
3. Based on the previous selection, the options below may be made available:
  - **False Alarm Limit** - how many false alarms the Authority allows
  - **False Alarm Period** - the time period, in seconds, for the false alarm
  - **False Alarm Starting Month** - the designated month (in numerals, 1-12) the false alarm tracking will begin
4. Enter the appropriate numbers into the specified fields.
5. If applicable, enter a **Charge Code**.
6. Once all data is entered, click **Save** or click on another tab to enter more Authority information.

## Authority Contact List

The *Authority Contact List* contains contact information for authorities and contacts alike. Most entries will be made under Contacts. It is possible to associate another Authority as a contact for an Authority record. For example, the Fire Authority might be associated with the Police Authority to prepare for complex emergency situations.

1. On the main *Contact List* screen, put the screen into Edit mode by clicking on the **Edit** button.
2. Click on the **Add** button. An *Add Keyholder* window will appear.

Add Keyholder form

3. Select whether the contact is a Keyholder or Global Keyholder.
4. Enter the **Name** of the contact.
5. Select the **Country**, **Language**, and **Time Zone** of the contact.
6. Enter the Contact's phone numbers.
7. Click **OK**. The system will return to the main *Contact List* form.



Authority Contact List

8. Enter a **Title** and/or **Suffix** for the contact, if applicable.
9. Enter the job **Title** of the contact.
10. Select the **Birthday** of the contact from the calendar. And designate whether to **Suppress** the birthday or not.
11. To add a picture for the contact, right click on the gray box located to the right of the



Contact's information. Select **Find**, and choose a picture file.

12. If applicable, click or tab into the **Valid From** and **To** fields and use the drop-down arrow to select a date from the calendar.
13. If the Contact will be inactive for a period of time, indicate that with the **Inactive From** and **To** fields. Use the drop-down arrows to select dates from the calendar for each field.

## Contact Details Tab

1. Click the *House* tab on the right side of the *Authority Contact* form.
2. Use the drop-down arrow located to the left of the top telephone number field to select a telephone number type from the list.
3. Click the **notepad** icon to the left of the first telephone number field and select **Properties**.
4. Enter the area code, phone number and extension (if applicable) into the fields available.
5. Click into the **E-mail** address field and type in the entire Email address. If there is more than one email address, use the down arrow to the left of the field to select to enter an additional one or two email addresses.
6. Tab or click into the **Web Address** field. Manitou automatically copies the text after the @ symbol in the Email address and adds 'www' to auto-fill the Web address. By default the Web address is highlighted for removal or overwriting. If there is no Web address delete the entry. If a different URL is necessary, enter the correct Web address.
7. Use the drop-down arrow to the left of the House icon in the *Address* section and select an address type. Designate whether or not this is also the **Mailing Address** as well.
8. Enter the **Zip** code.
9. Enter the **City** name.
10. Click or Tab into the **Street 1** field and enter the first line of address information for this Contact. Enter any additional address or suite information in to the **Street 2** field.
11. Enter the **Country** and select **Locale** and **Time Zone** in the *Location* section.

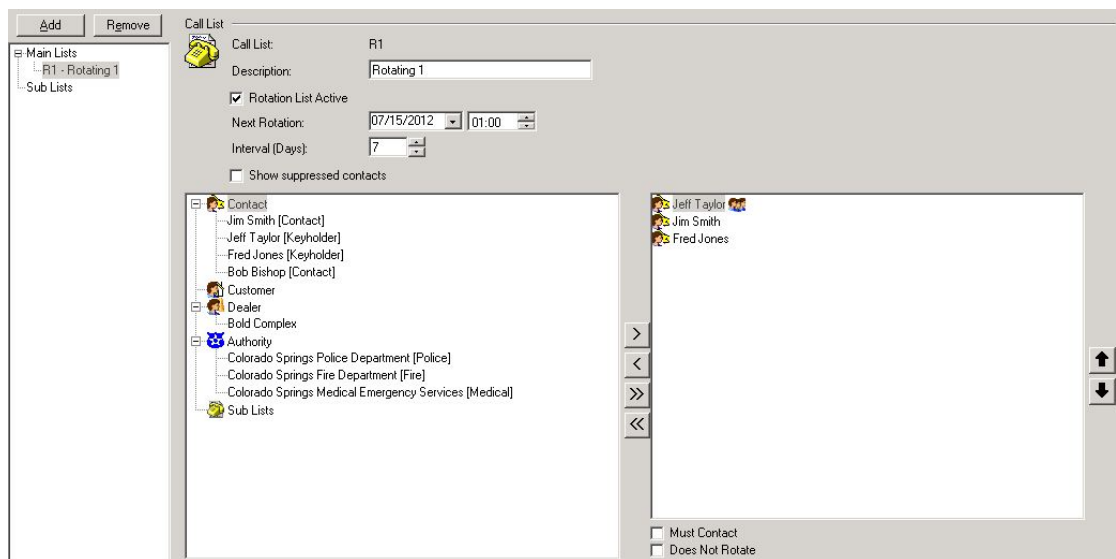
## Notes Tab

1. Click the *Note Pad* tab on the right of the *Authority Contact* form to open the *Notes* screen.
2. Enter any notes that pertain to the Contact.
3. Once all data is entered, click **Save** or click on another tab to enter more Authority information.

## Authority Call Lists

*Call Lists* for Dealers 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.

1. Select **Call Lists** from the *Authority Jump To* menu. The *Call List* screen will appear.




Authority Call List

2. Click on the **Add** button. An *Add Call List* window will appear.

**Add Call Lists**


Call List

 Name:

Description:

Type:


Member Matrix

 ☐ Display Contact Points

Call List Members		
Type	Contacts	R1
▶ Keyholder	Jim Smith	2
Keyholder	Jeff Taylor	1
Keyholder	Fred Jones	3
Keyholder	BOBB - Bob Bishop	
Dealer	BOLD - Bold Complex	
Authority	CSPD - Colorado Springs Police	
Authority	CSFD - Colorado Springs Fire	
Authority	CSMD - Colorado Springs Medical	
Customer	1003 - Bold Towers	

**Add Call Lists**

3. Enter the Call List **Name** or code into the first field (4 character limit, any characters). This name or code should be determined by the central station administrator.
4. Tab into the **Description** field and enter a short description of the Call List (35 character limit).
5. Select the Type from the drop-down menu in the field. If the list is a Main Call List, select **Main**. If it is a Sub List of a Main list, select **Sub List**.
6. Click **Add to Matrix**. The Call List will be added to the Customer's account and a Main column will be added to the *Member Matrix* table.
7. Select whether to **Display Contact Points** in the Call List.
8. Click **OK**.
9. Back at the *Call List* form, select the item or items from the Contacts list that should appear in the Call List. Contacts appearing in the list should be previously added in the [Contacts form](#) of the Customer Record.
10. Move the Contacts to and from the Call List by clicking on appropriate directional arrows.
11. Move list items up and down based on priority by clicking on the up/down arrows to the right of the Call List.

 Clicking on the contact's phone number or e-mail address and adding it to the Call List will only add that specific number or e-mail to the Call List. Select the contact's name and adding it to the Call List will add all contacts available for that Contact (varying phone numbers, e-mail, fax, etc.) Select only the specific phone number to add to the list if only one number should be contacted. If all forms of contact should be used, select the Contact's name, and add it to the list.

12. If the Call List rotates, check the **Rotation List Active** checkbox. The contact at the top of the list will automatically be the head of the list, indicated by an icon that appears when the Rotation List Active checkbox is checked. This contact will be first in rotation.
13. Indicate the **Next Rotation** date by selecting the correct date from the calendar. The start date defaults to the current day.
14. Set the rotation **Interval** by clicking on the up/down arrows to set the number of days each rotation is active before rotating.
15. If a Contact on the list is a **Must Contact** or **Does Not Rotate**, select the appropriate Contact and check the applicable boxes.
16. Once all data is entered, click **Save** or click on another tab to enter more Authority information.

## Authority Comments

The *Authority Comments* area allows users to view, enter, or edit temporary, current, future, and special instruction for a customer. The *Comment* area also offers users access to view expired comments about a customer.

Authority Comment form

## Add A Comment

1. If not already in Edit mode, click the **Edit** button at the top of the screen.
2. Click the **Add** button. The *Add Comments* dialog box appears.

Add Comment dialog box

3. Type a **Description** in the field and select the **Comment Type**.

- **Temporary** - only active for a specified amount of time
- **Standing** - active until removed
- **Special Instructions** - special instructions or scenarios that apply to the Customer record; active until removed. Special Instructions are created within the Supervisor Workstation.
- **In House** - only visible to the central station; not available to the Dealer when logged into Manitou remotely.

4. Click **OK**.

Comment form

5. Back at the *Comment* form, select when to show the Comment in the **Show On Open** section.
6. Designate whether the **Auto-Client** should ignore the comment or require the Operator to see it.
7. For Temporary Comments, select a **Valid From** and **To** date, when to **Follow Up** and

whether the system should **Auto Purge** the Comment once expired.

8. Type the **Comment** in the window provided.
9. Once all data is entered, click **Save** or click on another tab to enter more Authority information.

## Authority General Schedules

*Authority General Schedules* define the availability of Authorities.

General Schedules													
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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	07:00	08:00				
*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						

Authority General Schedules form

1. Click on the **General Schedules** button in the *Jump To* list.
2. Click the **Add** button to bring up the *Add Schedule* window.

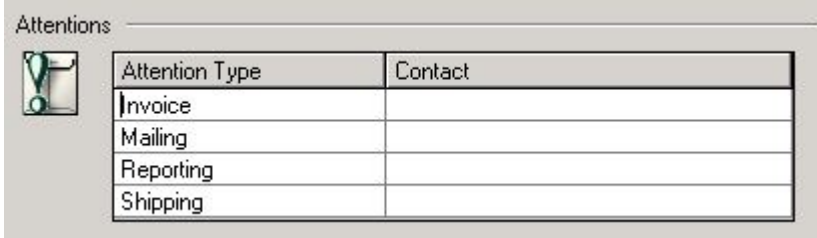
Add Schedule window

3. Enter a Schedule **Code**. This code is limited to 4 characters.
4. Enter a brief Description in the **Description** field.
5. Select the **Type** of Schedule from the drop-down menu.
6. Click **OK**.
7. Check the days of the week this schedule will apply to.

8. Click in the **Start 1** cell and enter the first open time. This number should be in 24-hour time, ie - 1pm = 13:00.
9. Tab into the **End 1** cell and enter the first close time. This number should be in 24-hour time, ie - 10pm = 22:00.
10. Repeat the above process for all additional open and close times.
11. Once all data is entered, click **Save** or click on another tab to enter more Authority information.


## Authority Attentions

*Authority Attentions* are used for the sole purpose of printing and mailing paper copies of reports run through Manitou. If an Attention is entered, Manitou will print that attention prior to printing out the physical address of the recipient.



Attention Type	Contact
Invoice	
Mailing	
Reporting	
Shipping	

Attentions form

1. Verify the Attentions form is in "New" mode or if making changes, click on the **Edit** button to put the screen into edit mode.
  2. Click in the appropriate field.
  3. Select the contact from the drop-down menu.
-  For Contacts to appear, they must first be entered into the [Contact List](#).
4. Once all data is entered, click **Save** or click on another tab to enter more Authority information.

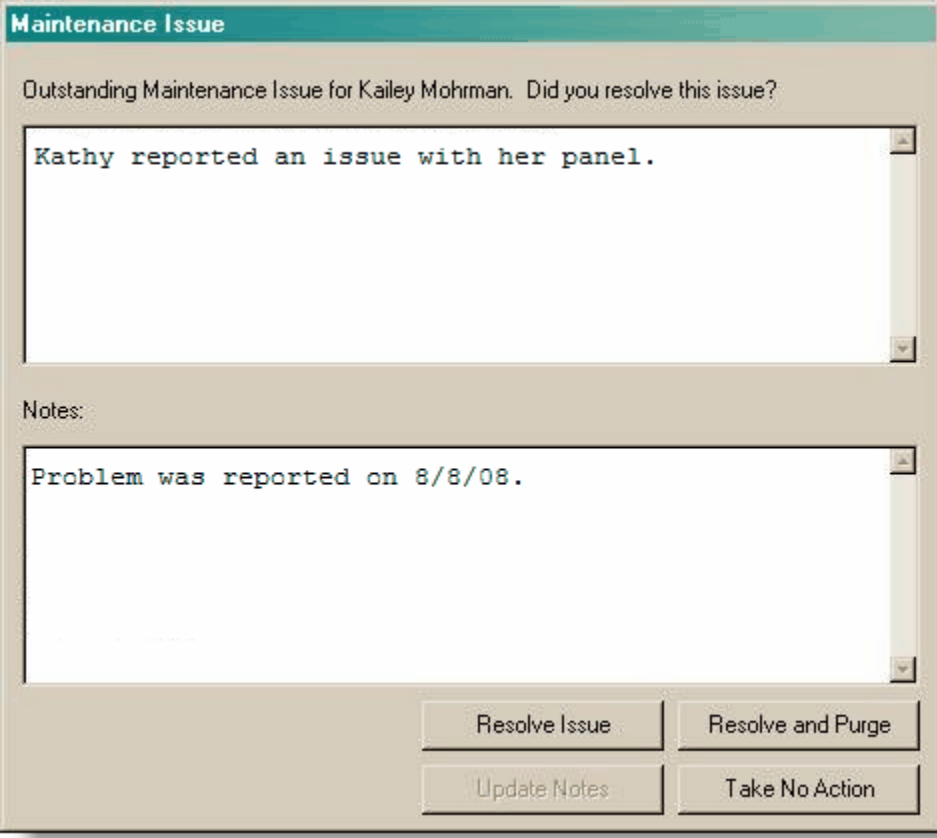
## Maintenance Issues

The *Maintenance Issues* form is similar to the global **Maintenance Issues** form; however, only maintenance issues for the Authority are displayed on the local Maintenance Issues form. Since only the Authority's issues are displayed, the filtering tab is not needed.

Additionally, all resolved and unresolved issues are displayed. Adding, editing, and clearing of the issues is similar to the global form, but this functionality is locked out when editing the Authority since the maintenance issues do not participate in the locking scheme for the Dealer. When editing and saving an entity with outstanding maintenance issues, the



Operator is prompted for each issue to determine if it was resolved, and for the Operator to resolve, purge or update the issue.



The screenshot shows a software window titled "Maintenance Issue". Inside, the text reads: "Outstanding Maintenance Issue for Kailey Mohrman. Did you resolve this issue?". Below this is a large text area containing the text "Kathy reported an issue with her panel.". Underneath the text area is a section labeled "Notes:" followed by another text area containing "Problem was reported on 8/8/08.". At the bottom of the window are four buttons: "Resolve Issue", "Resolve and Purge", "Update Notes", and "Take No Action".

Maintenance Issue

*Folder icon* Maintenance lists may be sorted with the exception of the Description and Notes columns.

- For more on Maintenance Issues, refer to [Alarm Handling Additional Functions: Maintenance Issues](#).
- Once all data is entered, click **Save**.

## Authority Finish

- Once all forms are entered, click **Save**.

This saves the basic information so that the account can receive signals, display to the address where an event was tripped, dispatch the applicable authority and contact the location.

*Folder icon* It is a good practice to review the data entry within the Customer Record by clicking the **View** button prior to entering additional data including Contacts, Call Lists, Open/Close Schedules and Comments.

## Agency

Agencies are companies that assist the central station in business-related areas, such as facility maintenance, alarm equipment providers, IT support consultants, and others. Any time you would have to use a contact point on a multiple account.

Please refer to the related subtopics on the Contents tab.

### Add an Agency

1. Select **Agency** from the *Maintenance* menu.
2. Click on the **New** button located at the top of the screen. An *Add Agency* box will appear.

Add Agency dialog box

3. Enter a unique ID into the **Agency ID** field. Agency IDs are specific to central station standards.
4. Enter the **Name** of the Agency.
5. Select the **Type** of Agency from the drop-down menu.
6. Select the **Country**, **Language** and **Time Zone** from the drop-down menus.
7. Click **OK**. The system will return to the main *Agency* form.
8. Back at the main screen, enter the address information in the *Address* section.
9. In the *Contact* section, enter the *Agency* phone numbers into the appropriate fields.
10. Enter an **E-mail** address, if applicable.
11. Enter a **Web Address**, if applicable.

## Agency Options

The *Agency Options* section contains additional information regarding the verification of the Agency, as well as charge codes for dispatch.




Agency Options, Verification

1. If not already in New or Edit mode, click the appropriate button at the top of the Application view.
2. Type in a **Verification Question** that the Agency representative should answer to verify identity.
3. Type in the expected **Answer**.
4. Enter the **Charge Code**.
5. Once all data is entered, click **Save** or click on another tab to enter more Agency information.

## Agency Contact List

The *Agency Contact List* contains contact information for authorities and contacts alike. Most entries will be made under Contacts.

1. Click the **Contact List** radio button from the *Agency Jump To* menu, put the screen into Edit mode by clicking on the **Edit** button.
2. Click on the **Add** button. An *Add Keyholder* window will appear.




**Add Keyholder**

☒ Keyholder
 ☐ Global Keyholder

Name:   
 Country:   
 Language:   
 Time Zone:

Contact

	Site	<input type="text"/>
	Home	<input type="text"/>
	Business	<input type="text"/>
	Mobile	<input type="text"/>

OK Cancel

Add Keyholder form

3. Select whether the contact is a Keyholder or Global Keyholder.
4. Enter the **Name** of the contact.
5. Select the **Country**, **Language**, and **Time Zone** of the contact.
6. Enter the Contact's phone numbers.
7. Click **OK**. The system will return to the main *Contact List* form.



Agency Contact List

8. Enter a **Title** and/or **Suffix** for the contact, if applicable.
9. Enter the job **Title** of the contact.
10. Select the **Birthday** of the contact from the calendar. And designate whether to **Suppress** the birthday or not.
11. To add a picture for the contact, right click on the gray box located to the right of the Contact's information. Select **Find**, and choose a picture file.


12. Select the **Access** permissions for this Dealer.
13. Enter a **Password, User No., and Temp Open Time** into the appropriate fields.
14. Enter a maximum amount of test time a Dealer may put an account on test.
15. If applicable, click or tab into the **Valid From** and **To** fields and use the drop-down arrow to select a date from the calendar.
16. If the Contact will be inactive for a period of time, indicate that with the **Inactive From** and **To** fields. Use the drop-down arrows to select dates from the calendar for each field.

## Contact Details Tab

1. Click the *House* tab on the right side of the *Agency Contact* form.
2. Use the drop-down arrow located to the left of the top telephone number field to select a telephone number type from the list.
3. Click the **notepad** icon to the left of the first telephone number field and select **Properties**.
4. Enter the area code, phone number and extension (if applicable) into the fields available.
5. Click into the **E-mail** address field and type in the entire Email address. If there is more than one email address, use the down arrow to the left of the field to select to enter an additional one or two email addresses.
6. Tab or click into the **Web Address** field. Manitou automatically copies the text after the @ symbol in the Email address and adds 'www' to auto-fill the Web address. By default the Web address is highlighted for removal or overwriting. If there is no Web address delete the entry. If a different URL is necessary, enter the correct Web address.
7. Use the drop-down arrow to the left of the House icon in the *Address* section and select an address type. Designate whether or not this is also the **Mailing Address** as well.
8. Enter the **Zip** code.
9. Enter the **City** name.
10. Click or Tab into the **Street 1** field and enter the first line of address information for this Contact. Enter any additional address or suite information in to the **Street 2** field.
11. Enter the **Country** and select **Locale** and **Time Zone** in the *Location* section.

## Notes Tab

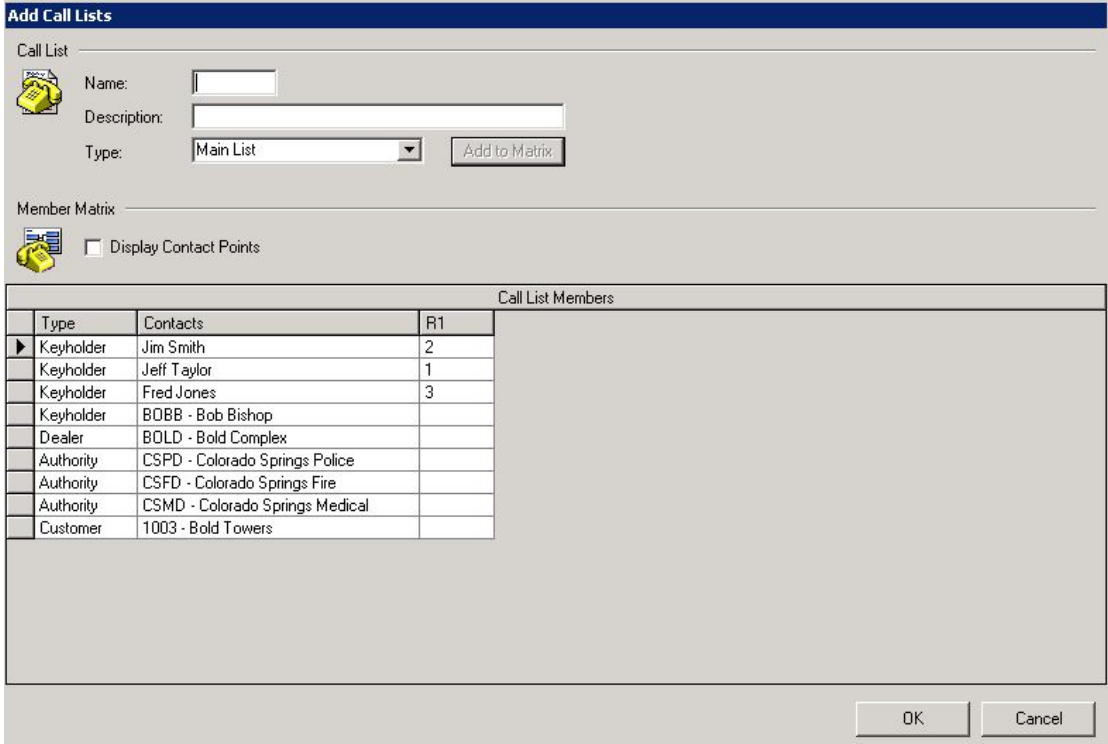
1. Click the *Note Pad* tab on the right of the *Authority Contact* form to open the *Notes* screen.
2. Enter any notes that pertain to the Contact.
3. Once all data is entered, click **Save** or click on another tab to enter more Authority information.

 *In order for Agencies to have the ability to authorize a schedule change for a customer, the "Can Edit Customer" button must be checked in the Agency contact's Permissions list.*

## Agency Call Lists

*Call Lists* for *Agencies* 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.

1. Select **Call Lists** from the *Agency Jump To* menu. Click on the **Add** button above the tree list. An *Add Call List* window will appear.



**Add Call Lists**

Call List

Name:

Description:

Type:

Member Matrix

☐ Display Contact Points


Type	Contacts	R1
Keyholder	Jim Smith	2
Keyholder	Jeff Taylor	1
Keyholder	Fred Jones	3
Keyholder	BOBB - Bob Bishop	
Dealer	BOLD - Bold Complex	
Authority	CSPD - Colorado Springs Police	
Authority	CSFD - Colorado Springs Fire	
Authority	CSMD - Colorado Springs Medical	
Customer	1003 - Bold Towers	

OK Cancel

**Add Call Lists**

3. Enter the Call List **Name** or code into the first field (4 character limit, any characters).

This name or code should be determined by the central station administrator.

4. Tab into the **Description** field and enter a short description of the Call List (35 character limit).
5. Select the Type from the drop-down menu in the field. If the list is a Main Call List, select **Main**. If it is a Sub List of a Main list, select **Sub List**.
6. Click **Add to Matrix**. The Call List will be added to the Customer's account and a Main column will be added to the *Member Matrix* table.
7. Select whether to **Display Contact Points** in the Call List.
8. Click **OK**.
9. Back at the *Call List* form, select the item or items from the Contacts list that should appear in the Call List. Contacts appearing in the list should be previously added in the [Contacts form](#) of the Customer Record.
10. Move the Contacts to and from the Call List by clicking on appropriate directional arrows.
11. Move list items up and down based on priority by clicking on the up/down arrows to the right of the Call List.  
  
 *Clicking on the contact's phone number or e-mail address and adding it to the Call List will only add that specific number or e-mail to the Call List. Select the contact's name and adding it to the Call List will add all contacts available for that Contact (varying phone numbers, e-mail, fax, etc.) Select only the specific phone number to add to the list if only one number should be contacted. If all forms of contact should be used, select the Contact's name, and add it to the list.*
12. If the Call List rotates, check the **Rotation List Active** checkbox. The contact at the top of the list will automatically be the head of the list, indicated by an icon that appears when the Rotation List Active checkbox is checked. This contact will be first in rotation.
13. Indicate the **Next Rotation** date by selecting the correct date from the calendar. The start date defaults to the current day.
14. Set the rotation **Interval** by clicking on the up/down arrows to set the number of days each rotation is active before rotating.
15. If a Contact on the list is a **Must Contact** or **Does Not Rotate**, select the appropriate Contact and check the applicable boxes.
16. Once all data is entered, click **Save** or click on another tab to enter more Agency information.

## Agency Comments

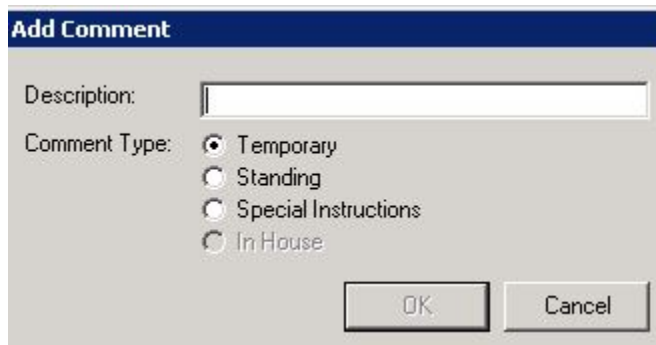
The *Agency Comments* area allows users to view, enter, or edit temporary, current, future, and special instruction for a customer. The *Comment* area also offers users access to view expired comments about a customer.

Agency Comment form

## Add A Comment

1. If not already in Edit mode, click the **Edit** button at the top of the screen.
2. Click the **Add** button. The *Add Comments* dialog box appears.



The image shows a Windows-style dialog box titled "Add Comment". It has a light gray background and a dark blue title bar. Inside the dialog, there is a text input field labeled "Description:". Below it, there is a section labeled "Comment Type:" with four radio button options: "Temporary" (which is selected), "Standing", "Special Instructions", and "In House". At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

Add Comment dialog box

3. Type a **Description** in the field and select the **Comment Type**.

- **Temporary** - only active for a specified amount of time
- **Standing** - active until removed
- **Special Instructions** - special instructions or scenarios that apply to the Customer record; active until removed. Special Instructions are created within the Supervisor Workstation.
- **In House** - only visible to the central station; not available to the Dealer when logged into Manitou remotely.

4. Click **OK**.

Comment

Description: Testing Comment

Show On Open

- ☒ Alarm
- ☐ Test
- ☐ Pre-Cancel
- ☐ Maintenance
- ☐ Paged Contacts
- ☐ Temporary Comments
- ☐ Temporary Schedules

Auto-Client: Operator Must See Alarm

Valid From: 07/08/2012 21:28

Valid To: 07/09/2012 21:27

☐ Auto Purge

Follow Up: 00:00

Comment

Comment form

5. Back at the *Comment* form, select when to show the Comment in the **Show On Open** section.
6. Designate whether the **Auto-Client** should ignore the comment or require the Operator to see it.
7. For Temporary Comments, select a **Valid From** and **To** date, when to **Follow Up** and whether the system should **Auto Purge** the Comment once expired.
8. Type the **Comment** in the window provided.
9. Once all data is entered, click **Save** or click on another tab to enter more Agency information.

## Agency General Schedules

*Agency General Schedules* define the availability of Agencies.

General Schedules

Add Remove

Name: TEST

Description: test

Type: Keyholder 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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	07:00	08:00				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						

Agency General Schedules form

1. Click on the **General Schedules** button in the *Jump To* list.
2. Click the **Add** button to bring up the *Add Schedule* window.

Add Schedule

Schedule:

Description:

Type:

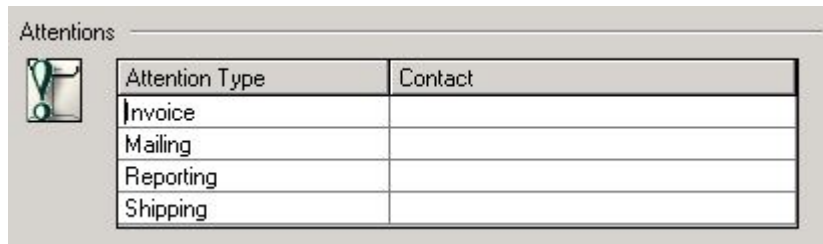
OK Cancel

Add Schedule window

3. Enter a Schedule **Code**. This code is limited to 4 characters.
4. Enter a brief Description in the **Description** field.
5. Select the **Type** of Schedule from the drop-down menu.
6. Click **OK**.
7. Check the days of the week this schedule will apply to.
8. Click in the **Start 1** cell and enter the first open time. This number should be in 24-hour time, ie - 1pm = 13:00.
9. Tab into the **End 1** cell and enter the first close time. This number should be in 24-hour time, ie - 10pm = 22:00.
10. Repeat the above process for all additional open and close times.
11. Once all data is entered, click **Save** or click on another tab to enter more Agency information.

## Agency Attentions


*Agency Attentions* are used for the sole purpose of printing and mailing paper copies of reports run through Manitou. If an Attention is entered, Manitou will print that attention prior to printing out the physical address of the recipient.



Attention Type	Contact
Invoice	
Mailing	
Reporting	
Shipping	

Attentions form

1. Verify the Attentions form is in New mode or if making changes, click on the **Edit** button to put the screen into edit mode.
2. Click in the appropriate field.
3. Select the contact from the drop-down menu.

 *For Contacts to appear, they must first be entered into the [Contact List](#).*

4. Once all data is entered, click **Save** or click on another tab to enter more Agency information.

## Maintenance Issues

The *Maintenance Issues* form is similar to the global **Maintenance Issues** form; however, only maintenance issues for the Agency are displayed on the local Maintenance Issues form. Since only the Agency's issues are displayed, the filtering tab is not needed.

Additionally, all resolved and unresolved issues are displayed. Adding, editing, and clearing of the issues is similar to the global form, but this functionality is locked out when editing the Authority since the maintenance issues do not participate in the locking scheme for the Dealer. When editing and saving an entity with outstanding maintenance issues, the Operator is prompted for each issue to determine if it was resolved, and for the Operator to resolve, purge or update the issue.

**Maintenance Issue**

Outstanding Maintenance Issue for Kailey Mohrman. Did you resolve this issue?

Kathy reported an issue with her panel.

Notes:

Problem was reported on 8/8/08.

Resolve Issue    Resolve and Purge  
Update Notes    Take No Action

Maintenance Issue

- 📁 *Maintenance lists may be sorted with the exception of the Description and Notes columns.*
- For more on Maintenance Issues, refer to [Alarm Handling Additional Functions: Maintenance Issues](#).
- Once all data is entered, click **Save**.

## Agency Finish

- Once all forms are entered, click **Save**.

This saves the basic information so that the account can receive signals, display to the address where an event was tripped, dispatch the applicable authority and contact the location.

- 📁 *It is a good practice to review the data entry within the Customer Record by clicking the **View** button prior to entering additional data including Contacts, Call Lists, Open/Close Schedules and Comments.*

# Branch

The Branch form allows the user to create and maintain a database of branches.

## Find a Branch Record

1. Select the **Branch** from the *Maintenance* menu. The *Branch* form will appear.

The screenshot shows the 'Branch Record form' with the following sections:

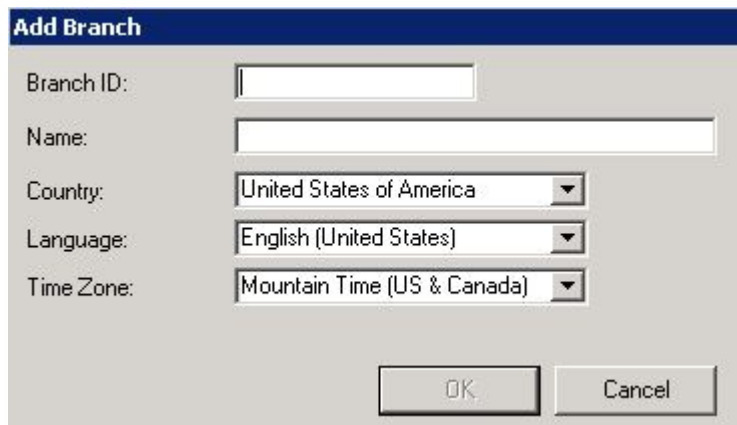
- Branch:** Branch ID (with a magnifier button), Name (with a dropdown arrow).
- Address:** Zip Code, State (dropdown), City, Street 1, Street 2, Country, Language (dropdown, set to 'English (United States)'), Time Zone (dropdown, set to 'Mountain Time (US & Canada)').
- Contact:** Site, Home, Business, Mobile (each with a dropdown arrow and a magnifier button).
- E-mail:** E-Mail (with a dropdown arrow and a magnifier button), PDF (dropdown).
- Web:** Web Address.
- Jump To:** A dropdown menu on the right with options: Branch (selected), Contact List, Call Lists, Attentions, Comments, General Schedule, Reports, Maintenance Iss, Statistics.

Branch Record form

2. Click the magnifier button to the right of the **Branch ID** field.
3. Select the parameters from the **Search Key** fields and enter the **Values** or use an asterisk (\*) then click the **Search** button.
4. Select the record to load from the search results then click the **Load** button. The selected record will now be displayed.

## Add A Branch

1. Select **Branch** from the *Maintenance* menu.
2. Click on the **New** button located at the top of the screen. An *Add Branch* box will appear.

The image shows a software dialog box titled "Add Branch". It contains five input fields: "Branch ID:" (a text box), "Name:" (a text box), "Country:" (a dropdown menu showing "United States of America"), "Language:" (a dropdown menu showing "English (United States)"), and "Time Zone:" (a dropdown menu showing "Mountain Time (US & Canada)"). At the bottom right of the dialog box are two buttons: "OK" and "Cancel".


Add Branch dialog box

3. Enter a unique ID into the **Branch ID** field. Branch IDs are specific to central station standards.
4. Enter the **Name** of the Branch.
5. Select the **Type** of Branch from the drop-down menu.
6. Select the **Country**, **Language** and **Time Zone** from the drop-down menus.
7. Click **OK**. The system will return to the main *Branch* form.
8. Enter the address information in the *Address* section.
9. In the *Contact* section, enter the *Branch* phone numbers into the appropriate fields.
10. Enter an **E-mail** address, if applicable.
11. Enter a **Web Address**, if applicable.

## Branch Contact List

The *Branch Contact List* contains contact information for authorities and contacts alike. Most entries will be made under Contacts.

1. Click the **Contact List** radio button from the *Branch Jump To* menu, put the screen into Edit mode by clicking on the **Edit** button.
2. Click on the **Add** button. An *Add Keyholder* window will appear.



The image shows a software window titled "Add Keyholder". At the top, there are two radio buttons: "Keyholder" (which is selected) and "Global Keyholder". Below these are four fields: "Name:" with a text input box, "Country:" with a dropdown menu showing "United States of America", "Language:" with a dropdown menu showing "English (United States)", and "Time Zone:" with a dropdown menu showing "Mountain Time (US & Canada)". A horizontal line separates these fields from a section labeled "Contact". To the left of the "Contact" section is a yellow telephone icon. To its right are four rows of phone number fields, each preceded by a dropdown arrow and a small icon of a phone with a location pin. The rows are labeled "Site", "Home", "Business", and "Mobile". At the bottom right of the window are "OK" and "Cancel" buttons.

**Add Keyholder**

☒ Keyholder      ☐ Global Keyholder


Name:

Country:

Language:

Time Zone:

Contact

 Site

Home

Business

Mobile

OK Cancel

Add Keyholder form

3. Select whether the contact is a Keyholder or Global Keyholder.
4. Enter the **Name** of the contact.
5. Select the **Country**, **Language**, and **Time Zone** of the contact.
6. Enter the Contact's phone numbers.
7. Click **OK**. The system will return to the main *Contact List* form.



**Contact**

Contact ID: \_\_\_\_\_

Name:  ...

Type:

Title:  Suffix:

Job Title:

Birthday:  ☐ Suppress

**Access**

☐ Permissions Suspended

☐ Can Cancel Alarm

☐ Can Authorize a Schedule Change

☐ Can Put Entire Customer On Test

☐ Can Put Designated System/Areas On Test

**Passwords**

Password:  Acct Company ID:

Web Access ID:  Acct Technician ID:

Web Profile:

VRT ID:

Max Test Time:

**Availability**

Valid From:  To:

Inactive From:  To:

Branch Contact form

8. Enter a **Title** and/or **Suffix** for the contact, if applicable.
9. Enter the job **Title** of the contact.
10. Select the **Birthday** of the contact from the calendar. And designate whether to **Suppress** the birthday or not.
11. To add a picture for the contact, right click on the gray box located to the right of the Contact's information. Select **Find**, and choose a picture file.
12. Select the **Access** permissions for this Branch.
13. Enter a **Password**, **User No.**, and **Temp Open Time** into the appropriate fields.
14. Enter a maximum amount of test time a Branch may put an account on test.
15. If applicable, click or tab into the **Valid From** and **To** fields and use the drop-down arrow to select a date from the calendar.

16. If the Contact will be inactive for a period of time, indicate that with the **Inactive From** and **To** fields. Use the drop-down arrows to select dates from the calendar for each field.


## Contact Details Tab

1. Click the *House* tab on the right side of the *Branch Contact* form.
2. Use the drop-down arrow located to the left of the top telephone number field to select a telephone number type from the list.
3. Click the **notepad** icon to the left of the first telephone number field and select **Properties**.
4. Enter the area code, phone number and extension (if applicable) into the fields available.
5. Click into the **E-mail** address field and type in the entire Email address. If there is more than one email address, use the down arrow to the left of the field to select to enter an additional one or two email addresses.
6. Tab or click into the **Web Address** field. Manitou automatically copies the text after the @ symbol in the Email address and adds 'www' to auto-fill the Web address. By default the Web address is highlighted for removal or overwriting. If there is no Web address delete the entry. If a different URL is necessary, enter the correct Web address.
7. Use the drop-down arrow to the left of the House icon in the *Address* section and select an address type. Designate whether or not this is also the **Mailing Address** as well.
8. Enter the **Zip** code.
9. Enter the **City** name.
10. Click or Tab into the **Street 1** field and enter the first line of address information for this Contact. Enter any additional address or suite information in to the **Street 2** field.
11. Enter the **Country** and select **Locale** and **Time Zone** in the *Location* section.

## Notes Tab

1. Click the *Note Pad* tab on the right of the *Branch Contact* form to open the *Notes* screen.
2. Enter any notes that pertain to the Contact.
3. Once all data is entered, click **Save** or click on another tab to enter more Branch

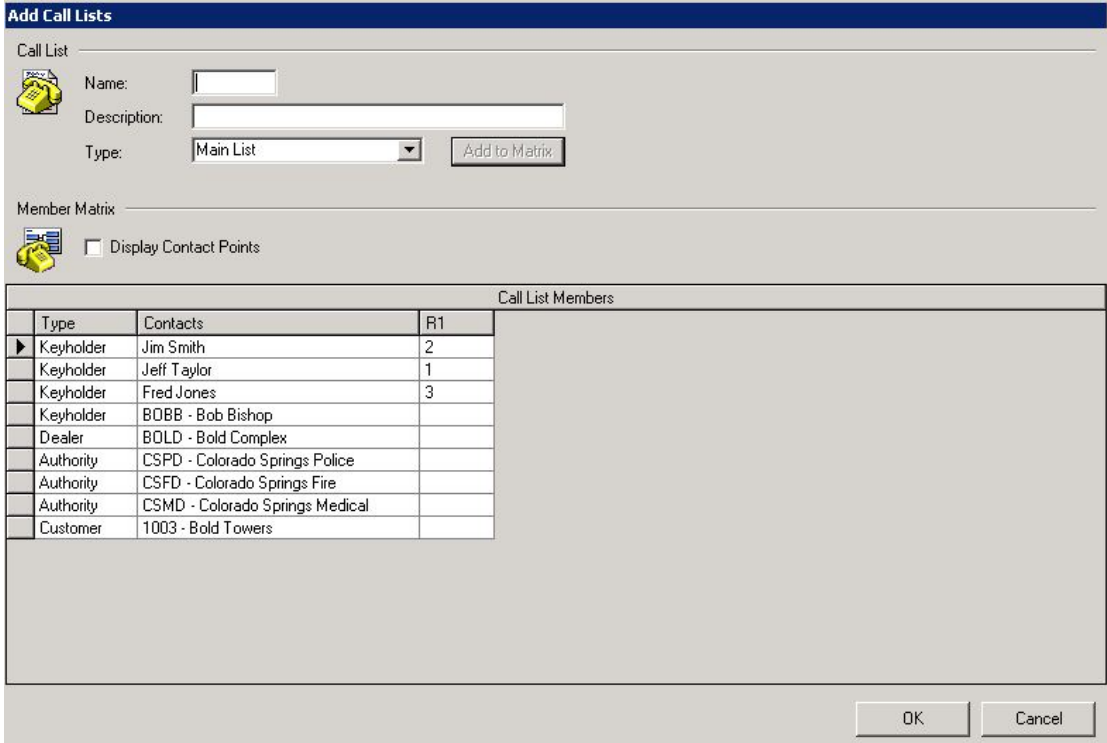
information.

 *In order for Branches to have the ability to authorize a schedule change for a customer, the "Can Edit Customer" button must be checked in the Agency contact's Permissions list.*

## Branch Call List


*Branch 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.

1. Select **Call Lists** from the Branch *Jump To* menu. Click on the **Add** button above the tree list. An *Add Call List* window will appear.



**Add Call Lists**


Call List

 Name:

Description:

Type:

Member Matrix


 ☐ Display Contact Points

Type	Contacts	R1
▶ Keyholder	Jim Smith	2
Keyholder	Jeff Taylor	1
Keyholder	Fred Jones	3
Keyholder	BOBB - Bob Bishop	
Dealer	BOLD - Bold Complex	
Authority	CSPD - Colorado Springs Police	
Authority	CSFD - Colorado Springs Fire	
Authority	CSMD - Colorado Springs Medical	
Customer	1003 - Bold Towers	

OK Cancel

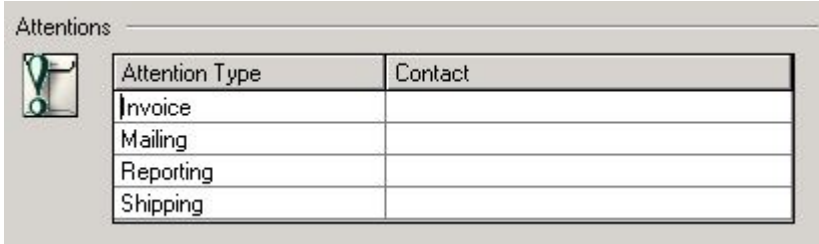
3. Enter the Call List **Name** or code into the first field (4 character limit, any characters). This name or code should be determined by the central station administrator.
4. Tab into the **Description** field and enter a short description of the Call List (35 character limit).
5. Select the Type from the drop-down menu in the field. If the list is a Main Call List, select **Main**. If it is a Sub List of a Main list, select **Sub List**.

6. Click **Add to Matrix**. The Call List will be added to the Customer's account and a Main column will be added to the *Member Matrix* table.
7. Select whether to **Display Contact Points** in the Call List.
8. Click **OK**.
9. Back at the *Call List* form, select the item or items from the Contacts list that should appear in the Call List. Contacts appearing in the list should be previously added in the [Contacts form](#) of the Customer Record.
10. Move the Contacts to and from the Call List by clicking on appropriate directional arrows.
11. Move list items up and down based on priority by clicking on the up/down arrows to the right of the Call List.
 

 *Clicking on the contact's phone number or e-mail address and adding it to the Call List will only add that specific number or e-mail to the Call List. Select the contact's name and adding it to the Call List will add all contacts available for that Contact (varying phone numbers, e-mail, fax, etc.) Select only the specific phone number to add to the list if only one number should be contacted. If all forms of contact should be used, select the Contact's name, and add it to the list.*
12. If the Call List rotates, check the **Rotation List Active** checkbox. The contact at the top of the list will automatically be the head of the list, indicated by an icon that appears when the Rotation List Active checkbox is checked. This contact will be first in rotation.
13. Indicate the **Next Rotation** date by selecting the correct date from the calendar. The start date defaults to the current day.
14. Set the rotation **Interval** by clicking on the up/down arrows to set the number of days each rotation is active before rotating.
15. If a Contact on the list is a **Must Contact** or **Does Not Rotate**, select the appropriate Contact and check the applicable boxes.
16. Once all data is entered, click **Save** or click on another tab to enter more Branch information.

## Branch Attentions


*Branch Attentions* are used for the sole purpose of printing and mailing paper copies of reports run through Manitou. If an Attention is entered, Manitou will print that attention prior to printing out the physical address of the recipient.



Attention Type	Contact
Invoice	
Mailing	
Reporting	
Shipping	

Attentions form

1. Verify the Attentions form is in New mode or if making changes, click on the **Edit** button to put the screen into edit mode.
2. Click in the appropriate field.
3. Select the contact from the drop-down menu.

 *For Contacts to appear, they must first be entered into the [Contact List](#).*

4. Once all data is entered, click **Save** or click on another tab to enter more Branch information.

## Branch Comments

The *Branch Comments* area allows users to view, enter, or edit temporary, current, future, and special instruction for a customer. The *Comment* area also offers users access to view expired comments about a customer.

Branch Comment form

## Add A Comment

1. If not already in New or Edit mode, click the appropriate button at the top of the screen.
2. Click the **Add** button. The *Add Comments* dialog box appears.

Add Comment dialog box

3. Type a **Description** in the field and select the **Comment Type**.

- **Temporary** - only active for a specified amount of time
- **Standing** - active until removed
- **Special Instructions** - special instructions or scenarios that apply to the Customer record; active until removed. Special Instructions are created within the Supervisor Workstation.
- **In House** - only visible to the central station; not available to the Dealer when logged into Manitou remotely.

4. Click **OK**.

Comment form

5. Back at the *Comment* form, select when to show the Comment in the **Show On Open** section.
6. Designate whether the **Auto-Client** should ignore the comment or require the Operator to see it.
7. For Temporary Comments, select a **Valid From** and **To** date, when to **Follow Up** and

whether the system should **Auto Purge** the Comment once expired.

8. Type the **Comment** in the window provided.
9. Once all data is entered, click **Save** or click on another tab to enter more Branch information.

## Branch General Schedules

*Branch General Schedules* define the availability of Branches.

General Schedules													
	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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	07:00	08:00				
*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						

Branch General Schedules form

1. Click on the **General Schedules** button in the *Jump To* list.
2. Click the **Add** button to bring up the *Add Schedule* window.

Add Schedule window

3. Enter a Schedule **Code**. This code is limited to 4 characters.
4. Enter a brief Description in the **Description** field.
5. Select the **Type** of Schedule from the drop-down menu.
6. Click **OK**.
7. Check the days of the week this schedule will apply to.



8. Click in the **Start 1** cell and enter the first open time. This number should be in 24-hour time, ie - 1pm = 13:00.
9. Tab into the **End 1** cell and enter the first close time. This number should be in 24-hour time, ie - 10pm = 22:00.
10. Repeat the above process for all additional open and close times.
11. Once all data is entered, click **Save** or click on another tab to enter more Branch information.

## Branch Reports

From the *Branch Reports* screen, Users can add and schedule reports to be periodically generated and sent from Manitou to the Branch.

To setup, manage or print a report, see [Reporting](#).

## Maintenance Issues

The *Maintenance Issues* form is similar to the global **Maintenance Issues** form; however, only maintenance issues for the Branch are displayed on the local Maintenance Issues form. Since only the Branch's issues are displayed, the filtering tab is not needed.

Additionally, all resolved and unresolved issues are displayed. Adding, editing, and clearing of the issues is similar to the global form, but this functionality is locked out when editing the Dealer since the maintenance issues do not participate in the locking scheme for the Dealer. When editing and saving an entity with outstanding maintenance issues, the Operator is prompted for each issue to determine if it was resolved, and for the Operator to resolve, purge or update the issue.

**Maintenance Issue**

Outstanding Maintenance Issue for Kailey Mohrman. Did you resolve this issue?

Kathy reported an issue with her panel.

Notes:

Problem was reported on 8/8/08.

Resolve Issue    Resolve and Purge  
Update Notes    Take No Action

Maintenance Issue

📁 *Maintenance lists may be sorted with the exception of the Description and Notes columns.*

- For more on Maintenance Issues, refer to [Alarm Handling Additional Functions: Maintenance Issues](#).
- Once all data is entered, click **Save**.

## Branch Statistics

*Branch Statistics* are a quick and easy to view customer statistics in the Manitou Client or from the Web. The *Statistics* form is a read-only menu, with the option of drilling down into each statistic for additional information.


For more information on Statistics, refer to [Data Entry, Dealer: Statistics](#).

## Branch Finish

- Once all forms are entered, click **Save**.

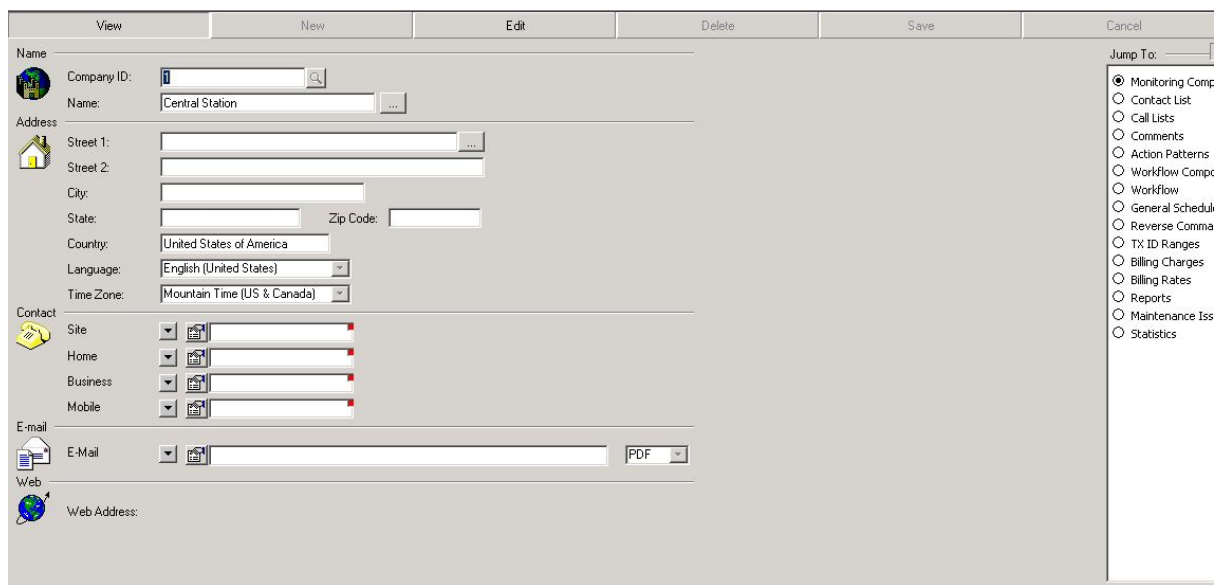
This saves the basic information so that the account can receive signals, display to the address where an event was tripped, dispatch the applicable authority and contact the

location.

 *It is a good practice to review the data entry within the Customer Record by clicking the **View** button prior to entering additional data including Contacts, Call Lists, Open/Close Schedules and Comments.*

## Monitoring Company

The *Monitoring Company* screen displays all of the specifics about the central station running Manitou. The *Central Station* record is created upon the initial installation of the system. If not completed during the implementation process, the Monitoring Company record details should be entered as soon after implementation as possible.



Monitoring Company record

- The *Monitoring Company* tab contains basic contact information including **Address**, **Contact** numbers, **Email** and **Web Address** details.
- To input or change information in these fields, put the record in Edit mode by clicking the **Edit** button at the top of the screen.
- Once all information has been entered and/or updated, click **Save** or select a different radio button from the Monitoring Company *Jump To* menu.

## Monitoring Company Contact List

The *Monitoring Contact List* contains contact information for authorities and contacts alike. Most entries will be made under Contacts.

1. Click the **Contact List** radio button from the *Monitoring Company Jump To* menu, put the screen into Edit mode by clicking on the **Edit** button.

- Click on the **Add** button. An *Add Keyholder* window will appear.

**Add Keyholder**

☒ Keyholder      ☐ Global Keyholder

Name:

Country:

Language:

Time Zone:

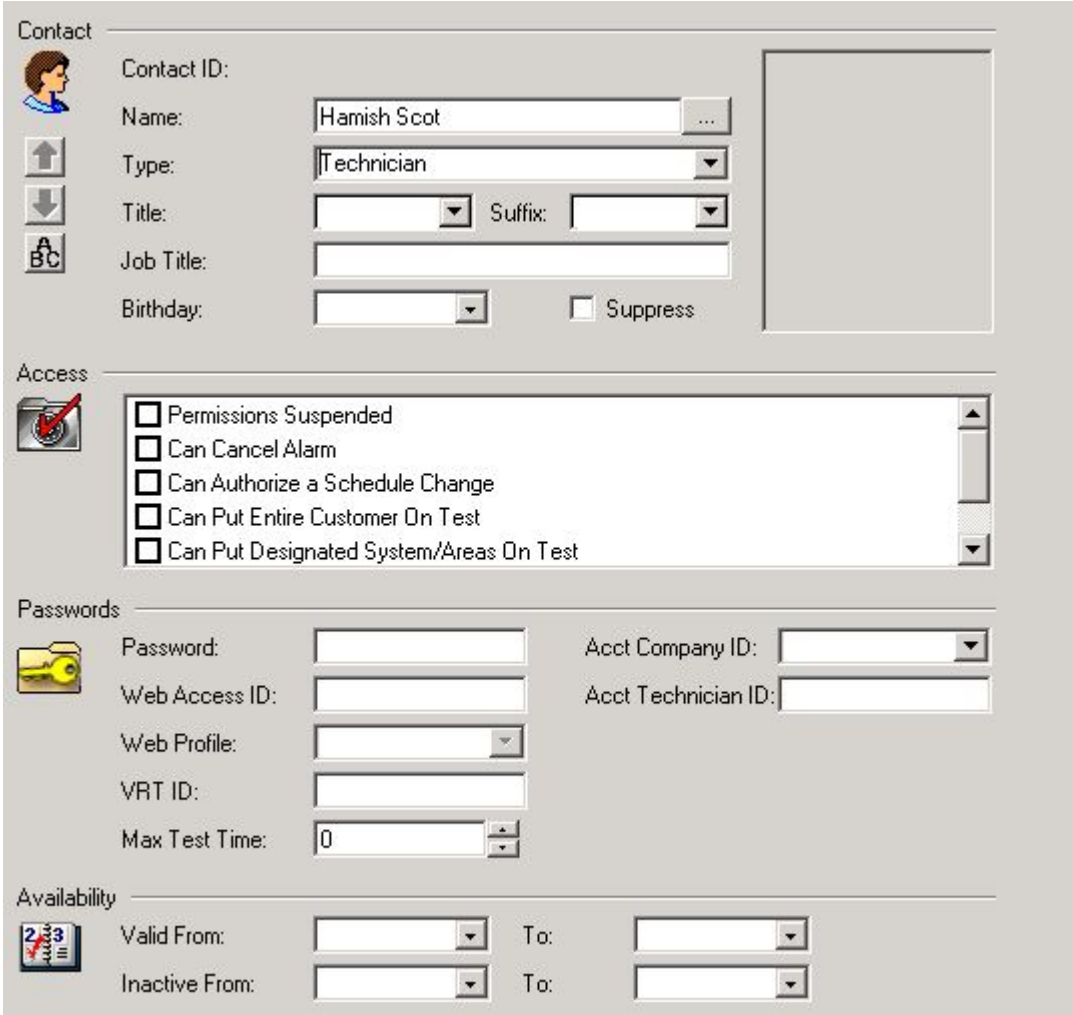
Contact

	Site	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Home	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Business	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Mobile	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel

Add Keyholder form

- Select whether the contact is a Keyholder or Global Keyholder.
- Enter the **Name** of the contact.
- Select the **Country**, **Language**, and **Time Zone** of the contact.
- Enter the Contact's phone numbers.
- Click **OK**. The system will return to the main *Contact List* form.



The form is divided into four main sections: Contact, Access, Passwords, and Availability. The Contact section includes fields for Contact ID, Name (pre-filled with 'Hamish Scot'), Type (pre-filled with 'Technician'), Title, Suffix, Job Title, and Birthday (with a calendar icon and a 'Suppress' checkbox). The Access section features a list of permissions with checkboxes: 'Permissions Suspended', 'Can Cancel Alarm', 'Can Authorize a Schedule Change', 'Can Put Entire Customer On Test', and 'Can Put Designated System/Areas On Test'. The Passwords section contains fields for Password, Web Access ID, Web Profile, VRT ID, Max Test Time (pre-filled with '0'), Acct Company ID, and Acct Technician ID. The Availability section has fields for Valid From, To, Inactive From, and To, each with a calendar icon.

Monitoring Company Contact form

8. Enter a **Title** and/or **Suffix** for the contact, if applicable.
9. Enter the job **Title** of the contact.
10. Select the **Birthday** of the contact from the calendar. And designate whether to **Suppress** the birthday or not.
11. To add a picture for the contact, right click on the gray box located to the right of the Contact's information. Select **Find**, and choose a picture file.
12. Select the **Access** permissions for this Monitoring Company.
13. Enter a **Password**, **User No.**, and **Temp Open Time** into the appropriate fields.
14. Enter a maximum amount of test time a Monitoring Company may put an account on test.
15. If applicable, click or tab into the **Valid From** and **To** fields and use the drop-down

arrow to select a date from the calendar.

16. If the Contact will be inactive for a period of time, indicate that with the **Inactive From** and **To** fields. Use the drop-down arrows to select dates from the calendar for each field.

## Contact Details Tab

1. Click the *House* tab on the right side of the *Monitoring Company Contact* form.
2. Use the drop-down arrow located to the left of the top telephone number field to select a telephone number type from the list.
3. Click the **notepad** icon to the left of the first telephone number field and select **Properties**.
4. Enter the area code, phone number and extension (if applicable) into the fields available.
5. Click into the **E-mail** address field and type in the entire Email address. If there is more than one email address, use the down arrow to the left of the field to select to enter an additional one or two email addresses.
6. Tab or click into the **Web Address** field. Manitou automatically copies the text after the @ symbol in the Email address and adds 'www' to auto-fill the Web address. By default the Web address is highlighted for removal or overwriting. If there is no Web address delete the entry. If a different URL is necessary, enter the correct Web address.
7. Use the drop-down arrow to the left of the House icon in the *Address* section and select an address type. Designate whether or not this is also the **Mailing Address** as well.
8. Enter the **Zip** code.
9. Enter the **City** name.
10. Click or Tab into the **Street 1** field and enter the first line of address information for this Contact. Enter any additional address or suite information in to the **Street 2** field.
11. Enter the **Country** and select **Locale** and **Time Zone** in the *Location* section.

## Notes Tab

1. Click the *Note Pad* tab on the right of the *Monitoring Company Contact* form to open the *Notes* screen.
2. Enter any notes that pertain to the Contact.

- Once all data is entered, click **Save** or click on another tab to enter more Monitoring information.

## Monitoring Company Call List

*Monitoring Company 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.

- Select **Call Lists** from the Monitoring Company *Jump To* menu. Click on the **Add** button above the tree list. An *Add Call List* window will appear.

**Add Call Lists**

Call List

Name:

Description:

Type:

Member Matrix

☐ Display Contact Points


Type	Contacts	R1
Keyholder	Jim Smith	2
Keyholder	Jeff Taylor	1
Keyholder	Fred Jones	3
Keyholder	BOBB - Bob Bishop	
Dealer	BOLD - Bold Complex	
Authority	CSPD - Colorado Springs Police	
Authority	CSFD - Colorado Springs Fire	
Authority	CSMD - Colorado Springs Medical	
Customer	1003 - Bold Towers	

OK Cancel

Add Call Lists

- Enter the Call List **Name** or code into the first field (4 character limit, any characters). This name or code should be determined by the central station administrator.
- Tab into the **Description** field and enter a short description of the Call List (35 character limit).
- Select the Type from the drop-down menu in the field. If the list is a Main Call List, select **Main**. If it is a Sub List of a Main list, select **Sub List**.
- Click **Add to Matrix**. The Call List will be added to the Customer's account and a Main column will be added to the *Member Matrix* table.

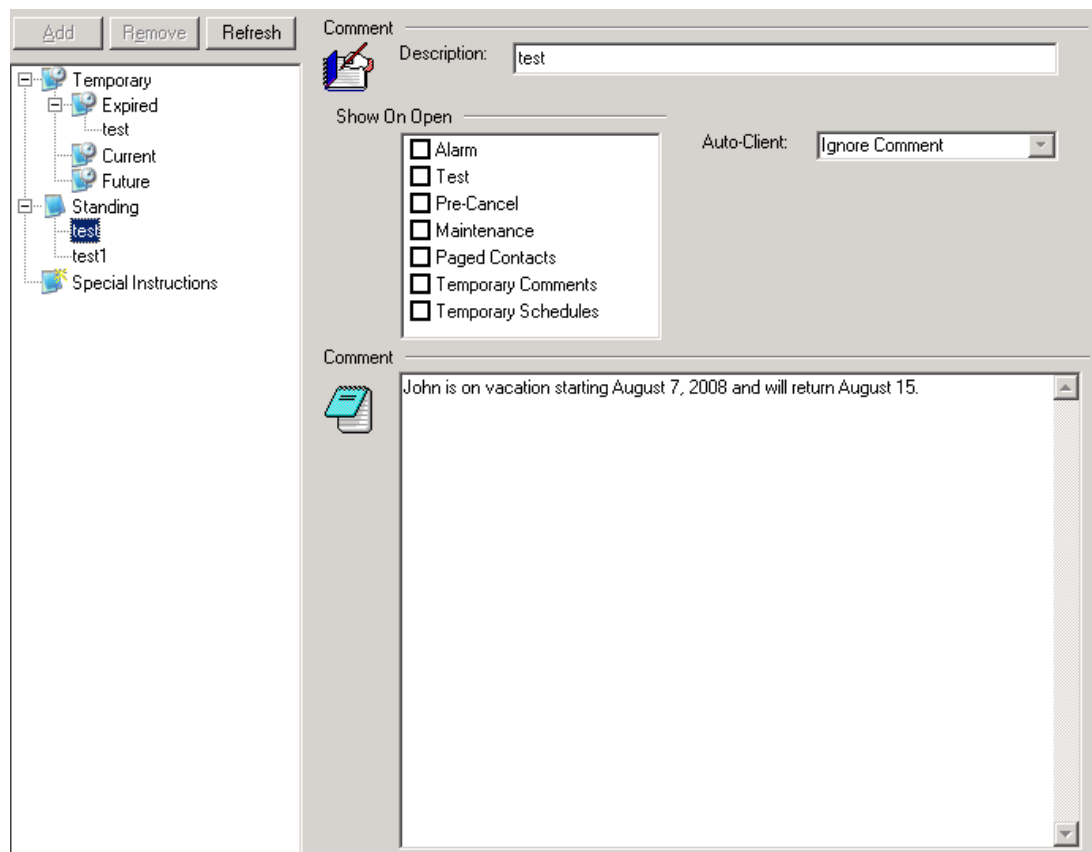
7. Select whether to **Display Contact Points** in the Call List.
8. Click **OK**.
9. Back at the *Call List* form, select the item or items from the Contacts list that should appear in the Call List. Contacts appearing in the list should be previously added in the [Contacts form](#) of the Customer Record.
10. Move the Contacts to and from the Call List by clicking on appropriate directional arrows.
11. Move list items up and down based on priority by clicking on the up/down arrows to the right of the Call List.
 

 *Clicking on the contact's phone number or e-mail address and adding it to the Call List will only add that specific number or e-mail to the Call List. Select the contact's name and adding it to the Call List will add all contacts available for that Contact (varying phone numbers, e-mail, fax, etc.) Select only the specific phone number to add to the list if only one number should be contacted. If all forms of contact should be used, select the Contact's name, and add it to the list.*
12. If the Call List rotates, check the **Rotation List Active** checkbox. The contact at the top of the list will automatically be the head of the list, indicated by an icon that appears when the Rotation List Active checkbox is checked. This contact will be first in rotation.
13. Indicate the **Next Rotation** date by selecting the correct date from the calendar. The start date defaults to the current day.
14. Set the rotation **Interval** by clicking on the up/down arrows to set the number of days each rotation is active before rotating.
15. If a Contact on the list is a **Must Contact** or **Does Not Rotate**, select the appropriate Contact and check the applicable boxes.
16. Once all data is entered, click **Save** or click on another tab to enter more Monitoring Company information.

## Monitoring Company Comments

The *Monitoring Company Comments* area allows users to view, enter, or edit temporary, current, future, and special instruction for a customer. The *Comment* area also offers users access to view expired comments about a customer.

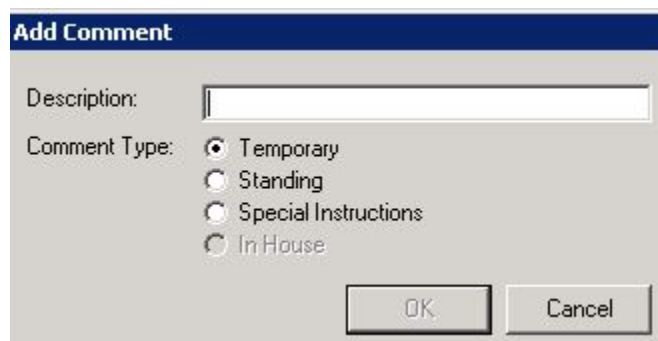


The screenshot shows a software window titled 'Monitoring Company Comment form'. On the left is a tree view with folders: 'Temporary' (containing 'Expired', 'Current', 'Future'), 'Standing' (containing 'test', 'test1'), and 'Special Instructions'. The 'test' folder under 'Standing' is selected. At the top are 'Add', 'Remove', and 'Refresh' buttons. The main area has a 'Comment' section with a 'Description' field containing the text 'test'. Below this is a 'Show On Open' section with a list of checkboxes: Alarm, Test, Pre-Cancel, Maintenance, Paged Contacts, Temporary Comments, and Temporary Schedules. To the right of this list is an 'Auto-Client' dropdown menu set to 'Ignore Comment'. At the bottom is a large text area for a comment, which contains the text: 'John is on vacation starting August 7, 2008 and will return August 15.'

Monitoring Company Comment form

## Add A Comment

1. If not already in New or Edit mode, click the appropriate button at the top of the screen.
2. Click the **Add** button. The *Add Comments* dialog box appears.

The screenshot shows a dialog box titled 'Add Comment'. It has a 'Description' text field. Below it is a 'Comment Type' section with four radio button options: 'Temporary' (which is selected), 'Standing', 'Special Instructions', and 'In House'. At the bottom right are 'OK' and 'Cancel' buttons.

Add Comment dialog box

3. Type a **Description** in the field and select the **Comment Type**.
  - **Temporary** - only active for a specified amount of time

- **Standing** - active until removed
- **Special Instructions** - special instructions or scenarios that apply to the Customer record; active until removed. Special Instructions are created within the Supervisor Workstation.
- **In House** - only visible to the central station; not available to the Dealer when logged into Manitou remotely.

4. Click **OK**.

Comment form

5. Back at the *Comment* form, select when to show the Comment in the **Show On Open** section.
6. Designate whether the **Auto-Client** should ignore the comment or require the Operator to see it.
7. For Temporary Comments, select a **Valid From** and **To** date, when to **Follow Up** and whether the system should **Auto Purge** the Comment once expired.

8. Type the **Comment** in the window provided.
9. Once all data is entered, click **Save** or click on another tab to enter more Monitoring Company information.

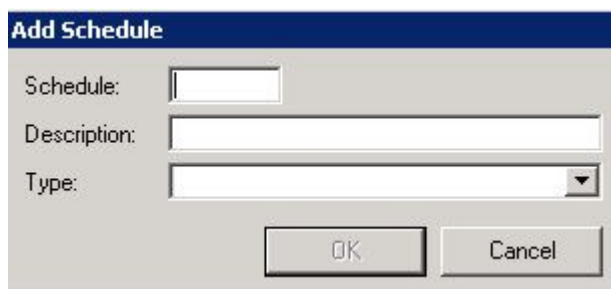
## Monitoring Company Action Patterns

Monitoring Company Action Patterns speed the processing of specific alarms by telling the Operator who to call and what actions to take on each and every alarm.

For more information on Action Patterns, see [Data Entry: Action Patterns](#).

## Monitoring Company General Schedules

1. Click on the **General Schedules** button in the *Jump To* list.
2. Click the **Add** button to bring up the *Add Schedule* window.



Add Schedule window

3. Enter a Schedule **Code**. This code is limited to 4 characters.
4. Enter a brief Description in the **Description** field.
5. Select the **Type** of Schedule from the drop-down menu.
6. Click **OK**.

General Schedules

Add Remove

Name: TEST

Description: test

Type: Keyholder 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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	07:00	08:00				
*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						

Monitoring Company General Schedules form

7. Check the days of the week this schedule will apply to.
8. Click in the **Start 1** cell and enter the first open time. This number should be in 24-hour time, ie - 1pm = 13:00.
9. Tab into the **End 1** cell and enter the first close time. This number should be in 24-hour time, ie - 10pm = 22:00.
10. Repeat the above process for all additional open and close times.
11. Once all data is entered, click **Save** or click on another tab to enter more Monitoring Company information.

## Monitoring Company TX ID Ranges

*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 ID) within a particular Dealer's range it is clear that the signal is from one of that Dealer's accounts. This gives the Operator more information when handling alarms.

### Add Transmitter Ranges

1. Open a Monitoring Company account to add Transmitter Range information.
2. Click the *TX Ranges* tab and put the screen into Edit mode.

	Rec. Line Designation	TX ID From	TX ID To	Next TX ID	TX ID Type	Range Full	Restart
▶	RL Prefix 10	0	9999	151	Decimal	<input type="checkbox"/>	<input type="checkbox"/>
	RL 100	10000	11000	10001	Hex (Include A)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	RL 101	11001	11999	11001	Hex (Exclude A)	<input type="checkbox"/>	<input type="checkbox"/>

3. Tab or Click into the **Receiver Line Designation** cell at the upper left.
4. Use the drop-down arrow at the right of the Receiver Line Designation cell and select the applicable Receiver Line from the listing. This information should be available from the Administrator or Manager of the central station. It is important to know which Customers and Dealers are assigned to which Receivers and RLDs.
5. Tab into the **TX ID** (Transmitter ID) **From** field and enter the starting number of the TX Range.
6. Tab into the **TX ID To** field and enter the ending number of the TX Range.
7. Tab into the **Next TX ID** field and enter the next Transmitter ID to use for this Monitoring Company record.
8. Tab into the **TX ID Type** field and use the drop-down arrow to indicate the format of the Transmitter ID (Decimal, Hex (Include A), Hex (Exclude A)). This is based on the TX ID format used by your central station and/or that Dealer.
9. Tab into the **Range Full** field and click the checkbox if the Transmitter ID range is full at this time. This is sometimes used to block out a particular number of transmitter ID's to be utilized by a specific account.
10. Tab into the **Restart** cell and click the checkbox if, once completely through the list of ranges, it is okay to start again looking for empty Transmitter ID numbers.
11. Repeat this process for all Transmitter Ranges allowable for the Monitoring Company.
12. Review all entries to ensure the accuracy of the information and **Save** the record. Enter any notes if necessary then click **OK**.
13. Alternately, click on another tab to continue editing this Monitoring Company record.

## Monitoring Company Reports

From the *Monitoring Company Reports* screen, Users can add and schedule reports to be periodically generated and sent from Manitou to the Monitoring Company.

To setup, manage or print a report, see [Reporting](#).

## Maintenance Issues

The *Maintenance Issues* form is similar to the global **Maintenance Issues** form; however, only maintenance issues for the Monitoring Company are displayed on the local Maintenance Issues form. Since only the Monitoring Company's issues are displayed, the filtering tab is not needed.

Additionally, all resolved and unresolved issues are displayed. Adding, editing, and clearing of the issues is similar to the global form, but this functionality is locked out when editing the Authority since the maintenance issues do not participate in the locking scheme for the Dealer. When editing and saving an entity with outstanding maintenance issues, the Operator is prompted for each issue to determine if it was resolved, and for the Operator to resolve, purge or update the issue.

**Maintenance Issue**

Outstanding Maintenance Issue for Kailey Mohrman. Did you resolve this issue?

Kathy reported an issue with her panel.

Notes:

Problem was reported on 8/8/08.

Resolve Issue    Resolve and Purge

Update Notes    Take No Action

Maintenance Issue

- ✎ *Maintenance lists may be sorted with the exception of the Description and Notes columns.*
- For more on Maintenance Issues, refer to [Alarm Handling Additional Functions: Maintenance Issues](#).
- Once all data is entered, click **Save**.

## Monitoring Company Statistics

*Monitoring Company Statistics* are a quick and easy to view customer statistics in the Manitou Client or from the Web. The *Statistics* form is a read-only menu, with the option of drilling down into each statistic for additional information.

For more information on Statistics, refer to [Data Entry, Dealer: Statistics](#).

## Global Keyholder

A Global Keyholder is normally a person who is associated with the central station, not a specific customer, but is an available resource that can be called to respond to events and alarms associated with any of the monitored customers. Once created, a Global Keyholder may be added-in to the call list of any customer on the system to be used within an Action Pattern.

### Find a Global Keyholder Record

1. Select the **Global Keyholder** from the *Maintenance* menu. The *Global Keyholder* form will appear.
2. Click the magnifier button to the right of the **Branch ID** field.
3. Select the parameters from the **Search Key** fields and enter the **Values** or use an asterisk (\*) then click the **Search** button.
4. Select the record to load from the search results then click the **Load** button. The selected record will now be displayed.

Please refer to the related subtopics on the Contents tab.

### Create a Keyholder Record

1. Select **Global Keyholder** from the *Maintenance* menu or press <F10> on the keyboard.
2. Click on the **New** button located at the top of the screen. An *Add Dealer* box will appear.



The 'Add Global Keyholder' dialog box contains the following fields and controls:

- Person ID:** A text input field.
- Name:** A text input field.
- Country:** A drop-down menu with 'United States of America' selected.
- Language:** A drop-down menu with 'English (United States)' selected.
- Time Zone:** A drop-down menu with 'Mountain Time (US & Canada)' selected.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

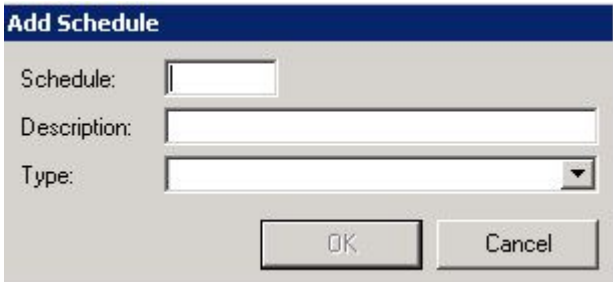
Add Global Keyholder dialog box

3. Enter a unique ID into the **Person ID** field. Keyholder IDs are specific to central station standards.
4. Enter the **Name** of the Keyholder.
5. Select the **Country**, **Language** and **Time Zone** from the drop-down menus.
6. Click **OK**. The system will return to the *Keyholder Contact* form.
7. Enter the address, city, state and zip code into the appropriate *Address* fields.
8. In the *Contact* section, enter the *Keyholder* phone numbers into the appropriate fields.
9. Enter an **E-mail** address, if applicable.
10. Enter a **Web Address**, if applicable.

## General Schedule

*Global Keyholder General Schedules* define the availability of Keyholders, schedules, and hours of executive protection.

1. Click on the **General Schedules** button in the *Jump To* list.
2. Click the **Add** button to bring up the *Add Schedule* window.



The 'Add Schedule' window contains the following fields and controls:

- Schedule:** A text input field.
- Description:** A text input field.
- Type:** A drop-down menu.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

Add Schedule window



3. Enter a Schedule **Code**. This code is limited to 4 characters.
4. Enter a brief Description in the **Description** field.
5. Select the **Type** of Schedule from the drop-down menu.
6. Click **OK**.

General Schedules													
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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	07:00	08:00				
*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						

Keyholder General Schedules form

7. Check the days of the week this schedule will apply to.
8. Click in the **Start 1** cell and enter the first open time. This number should be in 24-hour time, ie - 1pm = 13:00.
9. Tab into the **End 1** cell and enter the first close time. This number should be in 24-hour time, ie - 10pm = 22:00.
10. Repeat the above process for all additional open and close times.
11. Once all data is entered, click **Save** or click on another tab to enter more Monitoring Company information.

## Maintenance Issues

The *Maintenance Issues* form is similar to the global **Maintenance Issues** form; however, only maintenance issues associated with the Global Keyholder are displayed on the local *Maintenance Issues* form. Since only the Keyholder's issues are displayed, the filtering tab is not needed.

Additionally, all resolved and unresolved issues are displayed. Adding, editing, and clearing of the issues is similar to the global form, but this functionality is locked out when editing the Authority since the maintenance issues do not participate in the locking scheme for the Dealer. When editing and saving an entity with outstanding maintenance issues, the Operator is prompted for each issue to determine if it was resolved, and for the Operator to

resolve, purge or update the issue.

Maintenance Issue

- ✎ *Maintenance lists may be sorted with the exception of the Description and Notes columns.*
- For more on Maintenance Issues, refer to [Alarm Handling Additional Functions: Maintenance Issues](#).
- Once all data is entered, click **Save**.

## Global Keyholder Finish

- Once all forms are entered, click **Save**.

This saves the basic information so that the account can receive signals, display to the address where an event was tripped, dispatch the applicable authority and contact the location.

- ✎ *It is a good practice to review the data entry within the Customer Record by clicking the **View** button prior to entering additional data including Contacts, Call Lists, Open/Close Schedules and Comments.*

# Transmitter Types

The *Transmitter Types* screen allows Users to create a list of communicator types that are in common use throughout the Central Station's Customer base. Creating and maintaining a list greatly simplifies setting up new customers and dealers since information contained in this list is made available to the Operator when creating a new customer or dealer record.

A Transmitter is a device located at a Customer premises that communicates with the alarm communications Receivers connected to the system. The specific Transmitter is identified within the Customer record, along with associated details such as the protocol that it is using.

**Transmitter Type**

Transmitter Type: LINEAR  
 System Type: Event Monitoring  
 Description: linear  
 Protocol Type: 4x2, 4x1, 3x2, 3x1  
 Reverse Cmd Protocol: Media Gateway

**Transmitter Input ID**

Group	Base	Minimum	Maximum	Separator
Group 1 Value Range:	<input checked="" type="radio"/> Decimal <input type="radio"/> Hexadecimal			
Group 2 Value Range:	<input checked="" type="radio"/> Decimal <input type="radio"/> Hexadecimal			
Group 3 Value Range:	<input checked="" type="radio"/> Decimal <input type="radio"/> Hexadecimal			

TX Input ID:

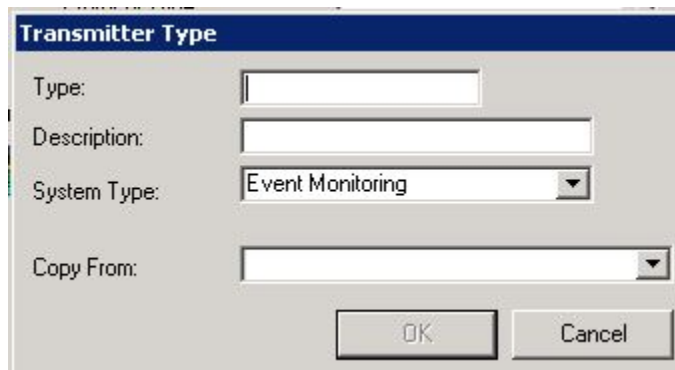
**Attributes**

☒ Audio Capable Audio Type:   
☒ Create Call Session (No Listen-In)  
☒ Drop Listen-In if no Alarm  
☐ Video Capable Video Type:   
☐ Raw Event Programming  
☐ Monitored Transmission Path  
☐ Generate L-T-T Only When Closed

On the left of the screen is the *Transmitter Type* tree. It is a list of transmitters currently entered into the system. To select a transmitter, simply click on the transmitter name. The details of the transmitter will then be displayed in the fields to the right of the tree.

## Adding a Transmitter Type

1. If not already in Edit mode, click the **Edit** button at the top of the screen.
2. Click on the **Add** button located above the *Transmitter Type* tree. An *Add Transmitter Type* box will appear.



The image shows a software dialog box titled "Transmitter Type". It contains the following fields and controls:

- Type:** A text input field.
- Description:** A text input field.
- System Type:** A drop-down menu with "Event Monitoring" selected.
- Copy From:** A drop-down menu.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

Add Transmitter Type window

3. Enter the transmitter ID or reference code for the **Type** of equipment.
4. Enter a brief **Description**.
5. Select **System Type** from the drop-down menu.
6. Determine whether or not the transmitter can be copied from an existing one. If yes, select it from the **Copy From** drop-down list. If no, leave this field blank.
7. Click **OK**. The system will return to the *Transmitter Type* form, with the **Type** and **Description** filled in.

**Transmitter Type**

Transmitter Type: LINEAR

System Type: Event Monitoring

Description: linear

Protocol Type: 4x2, 4x1, 3x2, 3x1

Reverse Cmd Protocol: Media Gateway

**Transmitter Input ID**

	Base	Minimum	Maximum	Separator
Group 1 Value Range:	<input checked="" type="radio"/> Decimal <input type="radio"/> Hexadecimal			
Group 2 Value Range:	<input checked="" type="radio"/> Decimal <input type="radio"/> Hexadecimal			
Group 3 Value Range:	<input checked="" type="radio"/> Decimal <input type="radio"/> Hexadecimal			

TX Input ID:

**Attributes**

☒ Audio Capable      Audio Type:

☒ Create Call Session (No Listen-In)

☒ Drop Listen-In if no Alarm

☐ Video Capable      Video Type:

☐ Raw Event Programming

☐ Monitored Transmission Path

☐ Generate L-T-T Only When Closed

8. Select the **Protocol Type**, if applicable. This is the communications protocol normally used by the transmitter device.
9. From the **Reverse Command Protocol** drop-down menu, select the protocol that will identify how reverse commands are handled by Manitou for this transmitter. If reverse commands will not be used, select **None**.
10. In the *Transmitter Input ID* section, indicate whether the **Base** is Decimal or Hexadecimal, the Minimum and Maximum values for **Group 1, 2 and 3** (as applicable), and if there is a **Separator** for Groups 1 and 2.
11. Tab or Click into the **TX Input ID** field and enter a Transmitter Input ID.

## Attributes

In the Attributes section, select any that may apply.

- **Audio Capable:** Select this checkbox if the Transmitter is capable of Transmitting audio

signals for alarm confirmation.

**Create Call Session (no listen in):** Manitou normally receives audio signals in two parts. The first part of an audio signal is the alarm. The second part of the signal informs Manitou that an audio communication will soon arrive, and that it needs to listen in for its arrival. Certain signals, however, arrive in two parts like audio signals, but are not solely comprised of audio. The Linear 4200 Panel, for instance, sends an IP signal and then sends a cellular voice call. The MediaGateway 2 was not previously capable of creating the listen in component for an alarm signal. Selecting this checkbox creates a session to receive cellular voice calls for signals when no listen in session is created.

**Drop Listen In if no Alarm:** Select this option to end the listen in session if no audio component arrives within the timeout time.

- **Video Capable** - Check this box if the transmitter is capable of transmitting video signals for alarm confirmation.
- **Raw Event Programming** – When checked, indicates that raw event programming is possible for this transmitter type.
- **Monitored Transmission Path** - Check if the communications path between transmitter and central station is monitored, for example, in the case of BT Red Care.
- **Generate L-T-T Only When Closed** – Check if Manitou will generate a late to test alarm ONLY when the premises are closed.

**Video Capable:** Select this checkbox if the Transmitter is capable of transmitting video signals for alarm confirmation.

**Raw Event Programming:** Select this checkbox to enable raw event programming for your Transmitter. This provides the ability to program raw signals instead of post-translation signals. This option is often selected when a site converts to Manitou from an older system.


**Monitored Transmission Path:** Select this checkbox if the communications path between the Transmitter and the Central Station should be monitored. If the communications path is severed, it generates an alarm.

**Generate L-T-T only when Closed:** Select this checkbox if you want Manitou to generate a L-T-T alarm only when the premises are closed.


## Transmitter Programming

Programming is required for every system in order to guarantee 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 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; call the police and then the Keyholder on the account.

Transmitter Programming


	Input				Output					Specific Processing		
	DES ▼	Area	Zone	Sensor	Event	Description	Are	Zor	Senso	Point ID	Commands	Help
▶	*A	*	2	*	PA	Panic Alarm	=	=	=			
	*A	*	9	*	*T	Trouble	=	=	=			
	*A	1	1	*	FA	Fire Alarm	=	=	=			
	*A	1	2	*	BA	Burglary Alarm	=	=	=			
*												

Event Actions Programming


	Event ▼	Area	Zone	Alarm	Action ID	Instructions
*						

Transmitter Programming table

## Enter Programming

1. To enter programming for a particular transmitter, first select the transmitter from the *Transmitter Types* tree.
2. Select the *Programming* tab at the bottom of the screen.

### Input Section


The Input section tells Manitou 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.

1. Type or select the Event Code (**DES**) from the drop-down menu to select a code for the incoming signal.
2. Tab into the **Area** cell and type in an Area.
3. Tab into the **Zone** cell and type in a Zone.
4. Tab into the **Sensor** cell and type in a Sensor, or use an asterisk (\*) to designate "Any".

## Output Section

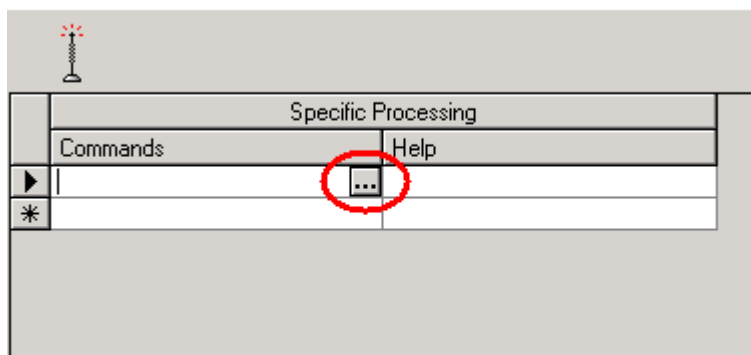
The Output section tells Manitou what the incoming (Input) signal information means. This is mainly used for non-intelligent signal formats.

1. Tab into the **Event** cell and type in an Event Code or select one from the drop-down menu.
2. The **Description** will auto-fill based on the Event Code selected; however, it may be overwritten
3. Tab into the **Area** cell and type in an Area.
4. Tab into the **Zone** cell and enter a Zone.
5. Tab into the **Sensor** cell and enter a Sensor. This must match the *Input Sensor* information.
6. Enter a Point ID in the **Point ID** cell, if necessary.

 The asterisk ( \* ) acts as a wild-card character. Using an asterisk in the Event, Area, Zone or TX cells tells Manitou to consider ALL of that item's values - i.e.: All Transmitters, or All Areas, etc.

## Transmitter Programming Commands

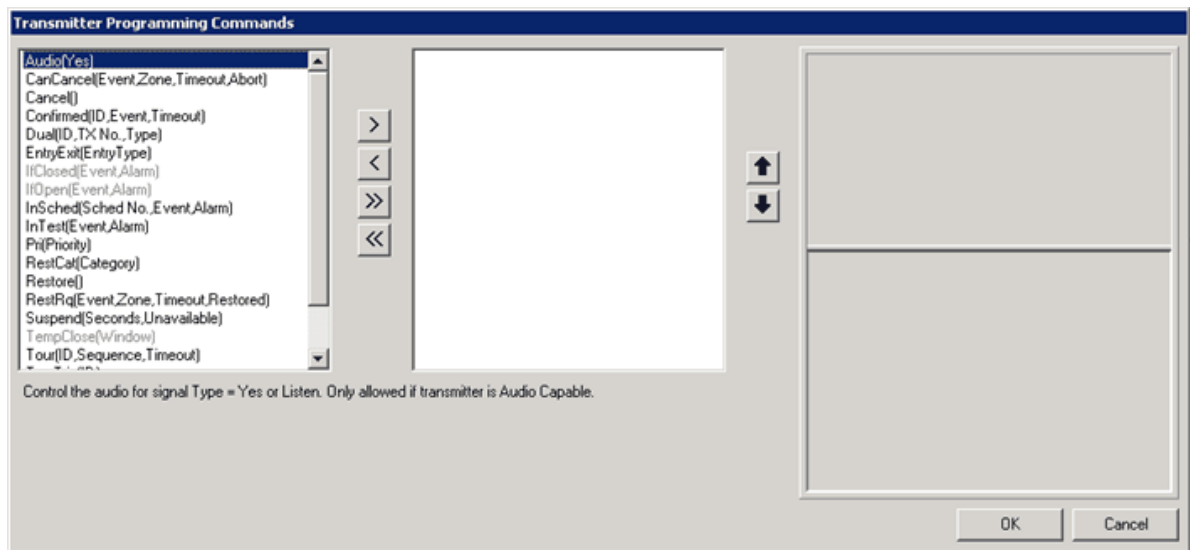
Transmitter programming commands can be located by clicking on the *Maintenance* pull-menu and selecting **Transmitter Types**. Click on the *Event Programming* tab, and scroll to the right to locate the *Specific Processing* section of the form. Click in the *Commands* field to bring up the **ellipsis** button.



Commands ellipsis button

Clicking on the **ellipsis** button will bring up the *Transmitter Programming Commands* form. Here, users can add programming commands to specific transmitters.

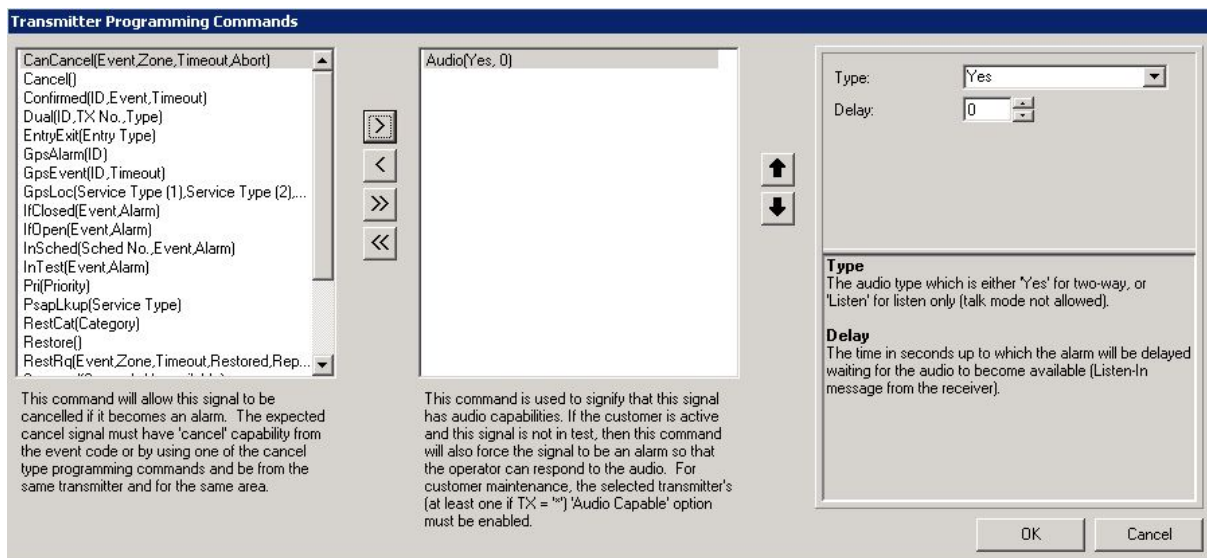




Transmitter Programming Commands form

## Audio

The *Audio* command indicates that the signal has audio capabilities as well as defines what audio commands will be made available. When adding a Transmitter to a System, the [Audio Capable box](#) must be checked in order to utilize this command. When the Audio command is added to the programming, users may select between **Yes** and **Listen** in the Type drop-down menu.



Audio Transmitter Programming Command

At times, an active customer may receive an audio signal which is not in test. When this occurs, this programming command will force the signal to become an alarm so that Operators may respond accordingly.

## Type

- **Yes** - Select "Yes" for two-way.
- **Listen** - Select "Listen" if no talk mode is allowed

## Delay

Amount of seconds the alarm will be delayed waiting for the audio to become available.

## CanCancel

The *CanCancel* command allows a signal to be canceled (removed from the Alarm Queue and logged) when a second qualifying cancel signal arrives. In order to enable this command, the **Auto-Cancel** checkbox on the [Options form](#) must be checked.

The screenshot shows the 'Options' tab of the Manitou CS Operator Workstation configuration window. The 'Auto Cancel' checkbox is checked and highlighted with a red circle. Other visible options include 'Ignore Aborts' (unchecked), 'Generate Unexpected Restores' (checked), 'Verify Panel User No.' (unchecked), 'Area Fill' (set to 'Add/Update Area always'), 'Zone Fill' (set to 'Ignore'), and 'Time Format' (set to 'Default'). The 'Passwords' section shows a table with columns for Password, Description, and Duress. The 'Codes' section shows dropdown menus for Group Code, Class Code, and Monitoring Group. The 'Default Script Message' section shows a list of event codes and their descriptions.

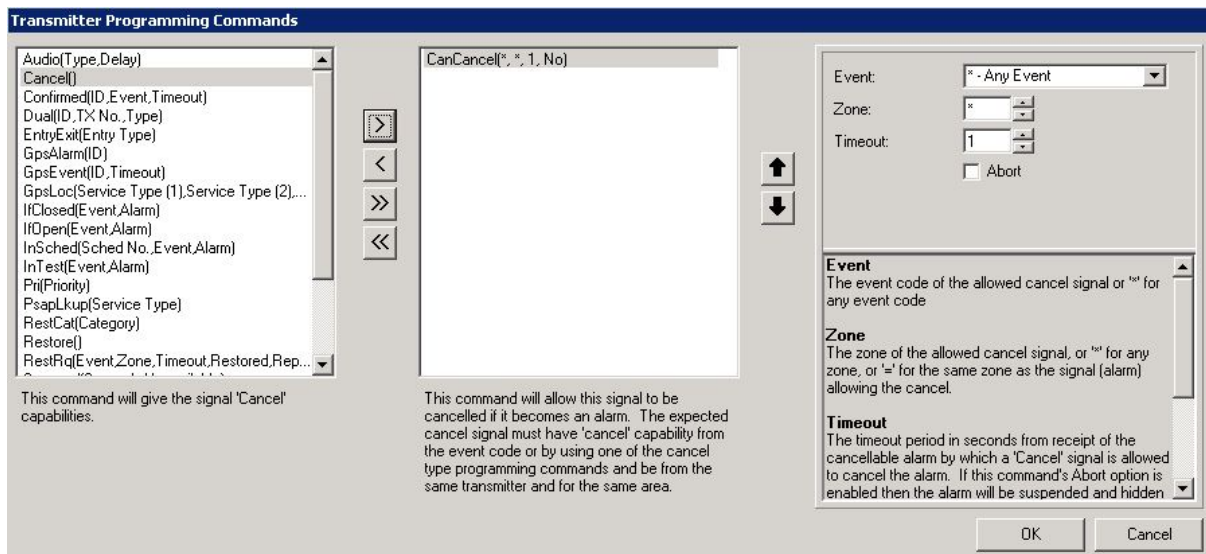
Password	Description	Duress
ALL CLEAR		<input type="checkbox"/>
*		<input type="checkbox"/>

Event Code	Event Description
{DT}	Event Date
{TM}	Event Time
{ET}	Event Description
{PR}	Event Priority
{DE}	Event Code
{CA}	Event Category
{AD}	Event Area

Options form, Auto Cancel checkbox

Checking the Auto-Cancel box indicates that alarms may be canceled out of the Alarm Queue without Operator interaction if a qualifying signal or alarm arrives within the specified amount of time.

Once the **CanCancel** programming option has been added, users have several options to choose from.



CanCancel Transmitter Programming Code

*Please note that in order for the CanCancel command to work, the expected cancel signal must have "Cancel" capability from the Event Code, or by using the CanCancel command and the signal containing the same transmitter and area.*

- **Event** - Select the Event Code that can cancel the alarm or asterisk (\*) for any Event. The Event system is looking to receive the signal on the output side of the programming. Therefore, if an activation (\*A) is translated to a restore (\*R), the event will be the **Restore**.
- **Zone** - Select the Zone that the cancel signal should come from, asterisk (\*) for any zone or equal sign (=) for the current signal's zone.
- **Timeout** - The timeout is the window in seconds that a cancel signal is allowed to cancel the alarm. The alarm will be initially hidden for this timeout period.
- **Abort** - Checking the Abort box will force a close of the alarm if the signal arrives within the timeout period.

*Please note that CanCancel keeps the event in a pre-alarm state and will not drop to the alarm handling Operator until the time-out is complete. If this is set to the maximum number of seconds (3600 seconds or one hour), the event will be an hour old before an Operator sees it if the cancel event does not arrive to cancel it.*

Check to ensure these five parameters are set in order for **CanCancel** to work as desired:

- ☐ The event code that will be canceled
- ☐ The event code that can do the canceling
- ☐ The programming line indicating the event in a certain zone can be canceled by

another event

- ☐ The canceling event saying it is the canceling event
- ☐ Setting permissions to Auto-Cancel at the customer level

## Cancel

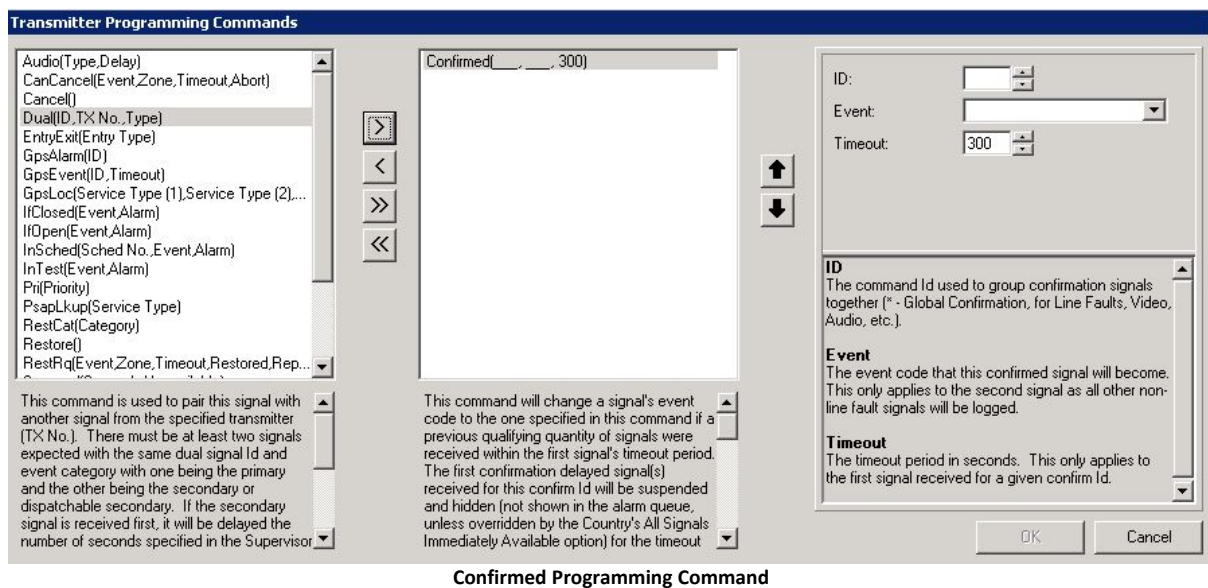
The *Cancel* command gives the signal Cancel abilities so that it is capable of canceling another signal. The canceling signal must have cancel properties in order for the cancel programming command to work. If the event does not have cancel properties, the soft programming (Signal Processing Commands) will only cancel a "CanCancel" event within 10 minutes of the alarm arrival. If the CanCancel is set for a timeout greater than 10 minutes (600 seconds), the Cancel property must be attached to the canceling event, regardless of whether or not the event has the property by default.

## Confirm

The *Confirmed* command will change an event code from a signal to the event code specified in this programming command. The second signal must be received within the timeout period in order for this to occur.

The first signal will be suspended for the designated timeout seconds, waiting for a possible second signal. If the second signal is received within the timeout period of the first signal, the first signal will be logged and the second signal will become the event code that was specified. If a second signal is not received within the timeout period, the first signal will be presented as a normal Event. A Line Fault signal can be considered to be the first signal for any ID group and is indicated by setting ID to '\*'.

Line fault signals may be used as the first confirmation signal, regardless of the confirmation ID. However, this will not be delayed or force logged as with other signals, but it will still hold the alarm. The line fault signal must have this command specified with the confirm ID set to '\*'. Using an asterisk indicates that the event code has no meaning for line fault signals.



- **ID** - This is the identifier to link together signals of the same confirm group. Use '\*' for Line Fault.
- **Event** - This is the Event (code) that the signal becomes. This only applies if this is the second signal to be received.
- **Timeout** - This is the delay time (in seconds) that the first signal will wait for a second signal in the same group.

## Dual

The *Dual* command is used when there are two signals from two different transmitters expected for the same event, and the signals should be paired together. These two signals must have the same dual signal ID and same event category.

The signals are marked as primary or secondary signals, with the primary signal needing to be received first. A signal should be chosen as Primary if it has the most detail regarding the event. The secondary is the signal with the least amount of detail. If the secondary signal is received first, it will be delayed based on the amount of time set in the Supervisor Workstation options. In the event that this occurs, a Missing Dual alarm is generated.

*The Dual Signal monitoring service in the customer record must be checked in order for this command to work properly.*

- **ID** – Identifier to link together signals of the same dual group.
- **TX NO.** – Transmitter number that will also send a signal for this same event.
- **Type** – Dual signal type: "Pri" = Primary; "Sec" = Secondary; "Dis" = Dispatchable Secondary.

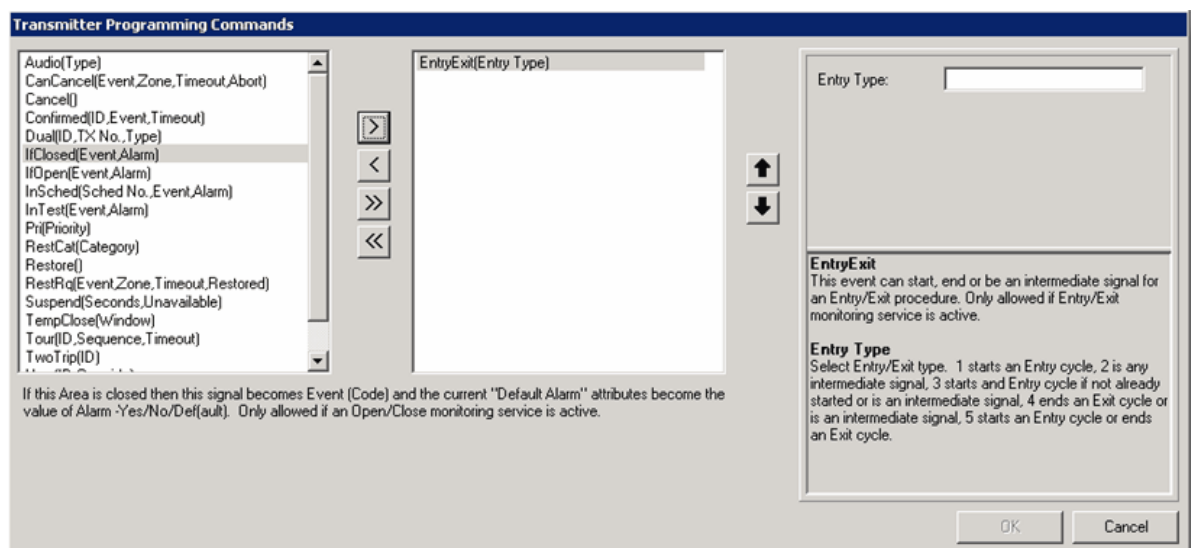
## EntryExit (EntryType)

The *Entry/Exit* command is used when signals are sent prior to an Opening signal, and after a Closing signal. Please note that the panel itself does not handle Entry/Exit delays.

Entry/Exit Delay must be selected in the Transmitter Programming Commands form. In addition, the record must also have Open/Close service and the signals must be for the same area. Entry Type is set to '1' for the signal to be tripped at the start of the entry process. This is also the last one to be tripped on the exit process. Entry Type is set to '2' for all other signals or to '3' if there are multiple entry/exit signals which may be the first/last signal. 4 ends an Exit cycle and can be used as an immediate signal, while 5 starts an Entry cycle or ends an Exit cycle.

The customer monitoring service for Open/Close is required and must be active for this system and area. The monitoring service for Entry/Exit is also required and must be active for this system or the command will be ignored. This monitoring service specifies the timeout period for the entry or exit cycle.

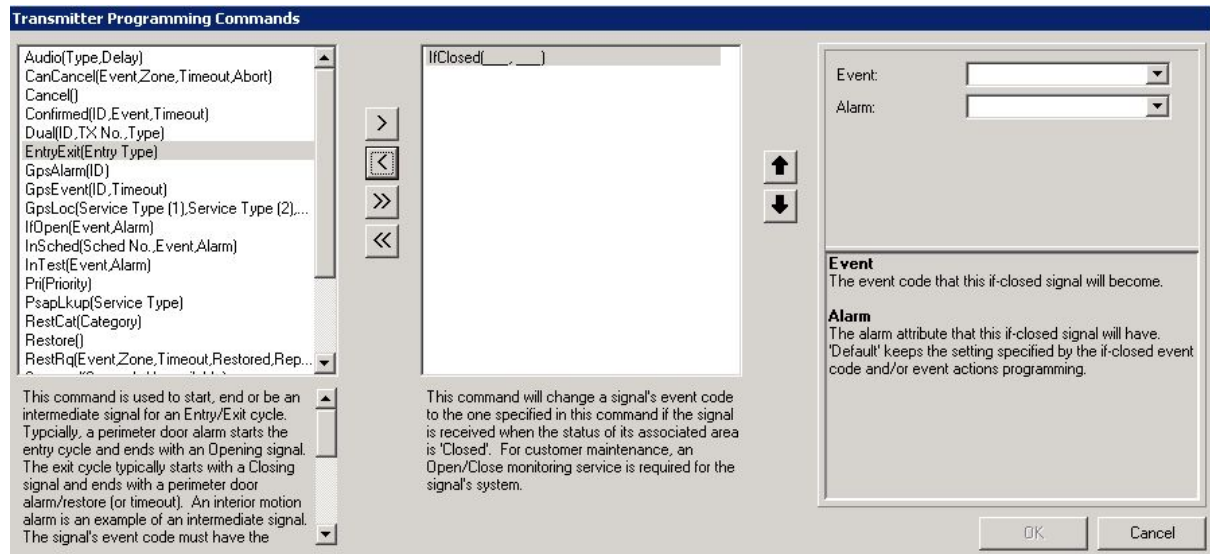
The signals that will participate in this process to must also contain the Signal Processing attribute of "m" and "n". The "m" attribute is not set on any events by default to ensure that each company sets this based on their specific company practices and make a reasoned decision before using this feature. The "n" attribute, if 'c,' 'd,' or 'e' is true then this option tells the signal handler to delete the alarm if it has been canceled when the alarm state is new or new/suspended. If the desired outcome is to remove this alarm from the alarm queue if the opening or closing occurs within the prescribed time period then the n command is also required.



EntryExit/EntryType Programming Command

## IfClosed (Event, Alarm)

The *IfClosed* command is used to change a signal to a specified event code if the area associated with the signal is closed when it is received. Customers must have an Open/Close monitoring service in order for this command to work properly.



IfClosed Programming Command

- **Event** – Event (code) that the signal becomes if the area is closed.
- **Alarm** – Alarm indicator: 'Yes' = Signal is forced to be an alarm; 'No' – Signal is forced to be logged; 'Default' = Alarm or Signal depending upon Event Programming or Event default.

## IfOpen (Event, Alarm)

The *IfOpen* command is used to change a signal to an event code if the area associated with this signal is open when it is received. This is only allowed if an Open/Close monitoring service is active.

- **Event** – Event (code) that the signal becomes if the area is open.
- **Alarm** – Alarm indicator: **Yes** = Signal is forced to be an alarm; **No** – Signal is forced to be logged; **Default** = Alarm or Signal depending upon Event Programming or Event default.

## InSched (Sched No., Event, Alarm)

The *InSched* command is used to change a signal's event code to another specified event code if it is received according to the acceptable times and days of the specified general programming schedule indicated when it is received. Users may set up a programming



schedule under General Schedules as well.

- **Sched No.** – General (programming) Schedule to be used.
- **Event** – Event (code) that the signal becomes if the signal is scheduled.
- **Alarm** – Alarm indicator: **Yes** = Signal is forced to be an alarm; **No** = Signal is forced to be logged; **Default** = Alarm or Signal depending upon Event Programming or Event default.

### InTest (Event,Alarm)

The *InTest* command is used to change a signal to an event code if the signal is On Test when it is received. In other words, if a specified signal arrives and the customer's system is currently On Test, the command will convert the original signal to the signal that is specified. This way, the signal can be actioned by an Operator.

- **Event** – Event (code) that the signal becomes if the signal is in test.
- **Alarm** – Alarm indicator: **Yes** = Signal is forced to be an alarm; **No** – Signal is forced to be logged; **Default** = Alarm or Signal depending upon Event Programming or Event default.

### Pri (Priority)

The *Priority* command is used to change a signal's priority by overriding the default even priority. This is only valid if the signal becomes an alarm. Users may override the priority by selecting a priority number.

### RestCat (EvCat)

The *RestCat* command gives restore by event category qualities to the signal that may not otherwise be known as a category restore. Users can choose the event category of signals to be restored.

### Restore ()

The *Restore* command gives restore by event category qualities to the signal that may not otherwise be known as a restore.

### ResRq (Event, Zone, Timeout)

The *ResRq* command is used to indicate that this signal requires a restore, but is not dependent on whether or not the signal becomes an alarm. This may be of help if a Burglary Alarm on a zone is mistakenly set off. The system should be sending a restore signal to



restore the zone back to a normal state. This way, the next time the alarm is tripped, it is not a secondary trip of the same zone, but rather a first trip of the same zone.

If Timeout is non-zero and the transmitter has "Generate Restore Overdues" enabled, a Restore Overdue signal will be generated after Timeout minutes if an appropriate restore signal is not received.

Note that the restores signal must have "restore" capability from the event code or by using one of the restore type programming commands. If the programming commands are used, the signal must be from the same transmitter and same area.

- **Event** – Event (code) of the expected restore signal.
- **Zone** – Zone of the expected restore signal or '\*' if any zone of type Event is to restore this signal, or '=' for the current signal's zone.
- **Timeout** – Delay time in minutes that this signal will wait for a restore signal before generating a Restore Overdue event or 0 if no Restore Overdue is to be generated.

### Suspend (Timeout, Hidden)

The *Suspend* command will suspend and optionally hide alarms when first received. If the signal is hidden while on suspension, it will not be displayed on the alarm queue. If the signal is not hidden, it will display on the alarm queue with a status of 'Suspended' and will not be auto-dispatched to an Operator until suspend time has expired. An Operator can select the alarm from the queue which would have the effect of canceling any remaining suspend time.

It is not recommend to combine this command with any other command that performs an initial hidden suspend, such as a Confirm command.

- **Timeout** – Delay time in seconds that this signal will be suspended.
- **Hidden** – Hidden indicator: 'Yes' = Signal is hidden while suspended; 'No' – Signal is not hidden.

### TempClose (Window)

The *TempClose* command creates a temporary close window when an Open signal is received. Customers must have an Open/Close service in order for this signal to work properly. The Window field indicates the time of the temporary close window in minutes.

### TwoTrip (ID)

The *TwoTrip* command will require two signals of the same ID to be received before considering the event to be a real signal and generate an alarm. Also, the customer must

not have UL service selected and the signal must be allowed through its Signal processing attributes to participate in Two-trip delays. The timeout for expecting the second signal is a system parameter setting in the Supervisor Workstation Options. The first signal is ignored, but logged. If a second or following signal is received within the timeout period of the first signal, then the subsequent signals are handled normally. The transmitter number and event category on the event code must be the same in order for two-trip to work. Monitoring service for two-trip must also be active on a customer account, or the command will be ignored.

The two-trip signal processing attributes must be applied to the output event codes, not the input. Therefore, if an activation on zone one translates to a burglary alarm, then the attribute must be on the burglary alarm, not the activation. The signal's event code must have the "two-trip delay" attribute specified.

**ID** – Identifier to link together signals of the same two-trip group.

### User (ID, Override)

The *User (ID, Override)* command sets the signal's User ID information (effective panel user ID) if not already supplied in the signal itself. Generally, the ID would be sent in as part of the signal or as the zone number when the signal is an open or a close type of event.

**ID** – Panel User ID or '\*' if the signal's zone is to be used as the User ID

### Video ()

The *Video* command indicates that the signal has video capability. Video Monitoring must be selected on the Services tab of the Customer record and Video Capable check box selected on the Transmitter form in the customer record in order to utilize this command.

This command will force the signal to become an alarm if the customer is active and the signal is not in test. This is so the Operator can respond appropriately.

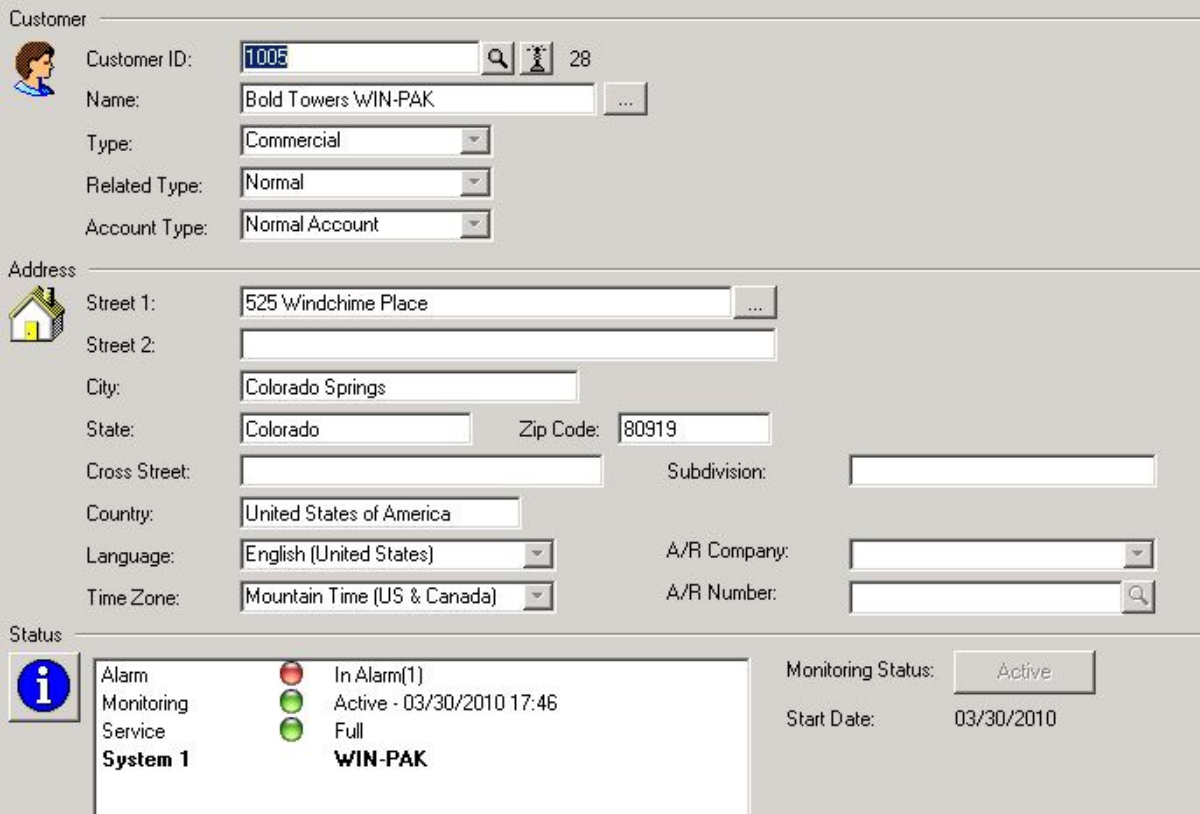
- 1 - Function ignored if back-dated signal
- 2 - Function ignored if Manual signal

# Account Maintenance

Account Maintenance in Manitou consists of viewing and editing records as well as viewing logs and making other adjustments within the system.

## Customer

The Customer Record, which can be accessed by clicking on the *Maintenance* menu > **Customer**, provides the means to view or edit an existing customer record. Once displayed, any page of the customer record may be accessed by selecting a page from the *Jump To* menu located to the right of the record.



**Customer**

Customer ID: 1005 28

Name: Bold Towers WIN-PAK

Type: Commercial

Related Type: Normal

Account Type: Normal Account

**Address**

Street 1: 525 Windchime Place

Street 2:

City: Colorado Springs

State: Colorado Zip Code: 80919

Cross Street: Subdivision:

Country: United States of America

Language: English (United States) A/R Company:

Time Zone: Mountain Time (US & Canada) A/R Number:

**Status**

Alarm	Monitoring	Service	System 1
In Alarm(1)	Active - 03/30/2010 17:46	Full	WIN-PAK

Monitoring Status: Active

Start Date: 03/30/2010

Customer Record

On initial display, the record will be blank. Once a customer record is loaded, the default display will show basic customer details, including the name, type of account (residential or commercial), address, and status of the account.

## Account Status

The Account Status portion of the screen shows what services are active, inactive or need attention. The Status form is a drill-down screen that can be expanded by double-clicking on a service.


## Locate a Customer Record

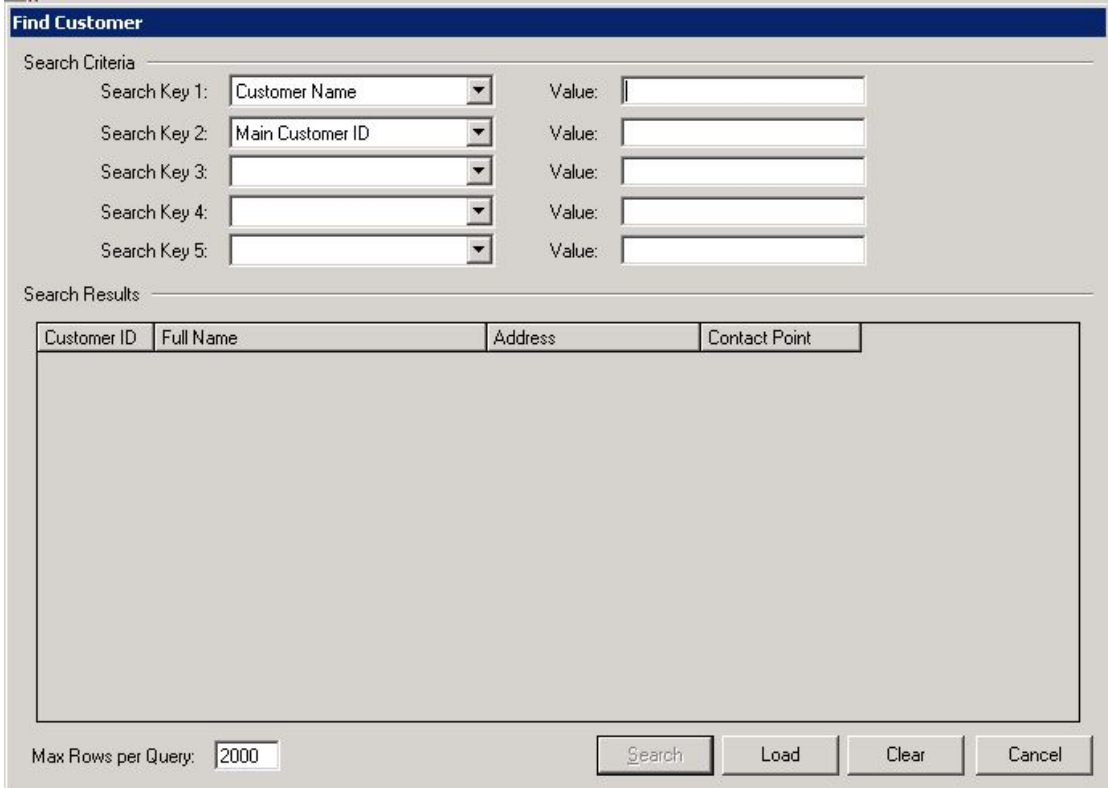
Locating a customer record may be done using specific information, such as Customer ID or using partial information through the *Customer Quick Load* function.

### Customer Lookup by Customer ID

Loading a customer record by Customer ID is a quick and simple process within the Manitou software.

If the Customer ID is known, enter the number into the **Customer ID** field and press **<Enter>**. The desired record will now be displayed.

1. If the Customer ID is not known, click on the magnifying glass button  to the right of the **Customer ID** field. This will display the *Find Customer* search window.



The **Find Customer** search form is a window with a title bar. It contains a 'Search Criteria' section with five rows. Each row has a 'Search Key' dropdown menu and a 'Value' text input field. The first row has 'Customer Name' selected, and the second row has 'Main Customer ID' selected. Below this is a 'Search Results' section containing a table with four columns: 'Customer ID', 'Full Name', 'Address', and 'Contact Point'. The table body is currently empty. At the bottom left, there is a 'Max Rows per Query' field set to '2000'. At the bottom right, there are four buttons: 'Search', 'Load', 'Clear', and 'Cancel'.

Find Customer search form


2. In the *Search Key* fields, select a search parameter such as **Customer ID** or **Street Name**.
3. Enter the search terms, such as the street name, into the *Value* field.
4. Click on the **Load** button or press **<Enter>** on the keyboard. The search results will then appear in the table below the search criteria fields.

5. Locate the customer record and double-click on it to load the customer record.

## Quick Load

The *Customer Quick Load* feature is a real-time search for specific records, looking in six (6) different fields to match information as you type. This feature makes it extremely easy to locate customer information even in cases where only partial information may be known, such as part of the customer company name.

### Searching Records using Quick Load

1. Select the quick search feature by choosing **Customer Quick Load** from the *Operations* pull-down menu, click the **Quick Load** button () in the toolbar, or type <Ctrl> + <L> on the keyboard.
2. From the *Quick Load* search screen, begin typing a word or phrase in the **Search For** field. The search results populate as you type, highlighting those fields relating to the criteria provided.


Quick Load

Search For:  45 Results

Customer ID	Customer Name	Address	City	State	Contact Name	
BOLD-PROD	Bold Production Facility	421 Windchime Place	Colorado Springs	CO		
BOLDTECH	Bold Technologies Ltd	421 Windchime Place	Colorado Springs	CO		
1003	Bold Towers	525 Windchime Place	Colorado Springs	CO		
1005	Bold Towers WIN-PAK	525 Windchime Place	Colorado Springs	CO		
BOLD-WH	Bold Warehouse 1	7315 Corporate Center Drive	Colorado Springs	CO		
BOLDGROUP	BoldGroup Corporate	421 Windchime Place	Colorado Springs	CO		
1010	Coles Towers	1600 Bold Avenue	Colorado Springs	CO		
1003	Bold Towers	525 Windchime Place	Colorado Springs	CO	bobb@boldgroup.com	
1005	Bold Towers WIN-PAK	525 Windchime Place	Colorado Springs	CO	bobb@boldgroup.com	
C1001	Clark Apparel #1001	8745 Mountain View Drive	Colorado Springs	CO	bobb@boldgroup.com	
C1002	Clark Apparel #1002	9147 Union Blvd	Colorado Springs	CO	bobb@boldgroup.com	
C1002	Clark Apparel #1002	9147 Union Blvd	Colorado Springs	CO	http://www.boldgroup.com	
C1003	Clark Apparel #1003	144 Academy Road	Colorado Springs	CO	bobb@boldgroup.com	
C1003	Clark Apparel #1003	144 Academy Road	Colorado Springs	CO	http://www.boldgroup.com	
C1004	Clark Apparel #1004	5478 Powers Blvd	Colorado Springs	CO	bobb@boldgroup.com	
C1004	Clark Apparel #1004	5478 Powers Blvd	Colorado Springs	CO	http://www.boldgroup.com	
C1005	Clark Distribution Center #1	8900 Mountain View Drive	Colorado Springs	CO	bobb@boldgroup.com	
C1005	Clark Distribution Center #1	8900 Mountain View Drive	Colorado Springs	CO	http://www.boldgroup.com	
1006	Gas & Sip	2154 Union Blvd	Colorado Springs	CO	bobb@boldgroup.com	
1006	Gas & Sip	2154 Union Blvd	Colorado Springs	CO	http://www.boldgroup.com	
6002	John Cabot	5874 Maple Drive	Vancouver	BC	bobb@boldgroup.com	
2003	John Wayne	7465 Academy	Colorado Springs	CO	bobb@boldgroup.com	
U5051	University Activity Center	9174 University Plaza	Colorado Springs	CO	bobb@boldgroup.com	

Page 1 of 2

Quick Load Real-time Search

 The search fields include: Customer ID & Name, Address, City, State and Contact Name with the last field on the right being a "floater". This floater field searches all remaining fields for any relatable verbiage and displays this information as well, ie - Password, Email address, Telephone number, etc.

3. Double-click on any line in the search results to load that particular record.

## Browse a Customer Record

Once the Customer record is displayed, browsing the record is simply a matter of selecting a page using the Jump To menu radio buttons located to the right of the customer record.

Click on the appropriate radio button in the **Jump To** menu. The appropriate page will be displayed.

## Edit a Customer Record

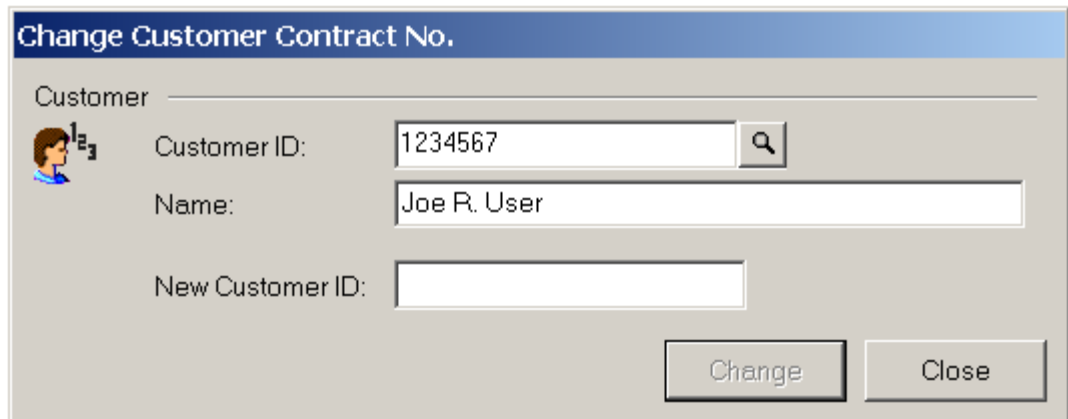
Sometimes, changes must be made to a customer record, such as a new phone number or a change in address.

1. To edit a Customer record, load the appropriate record and click on the **Edit** button at the top of the screen to put the record into Edit mode.
2. Make any necessary changes, and click the **Save** button at the top of the screen to save the record.

## Change Customer ID



The *Change Customer ID* function provides the ability to quickly change the Customer ID (or contract number) of an existing customer without creating a new account.

1. Select the **Tools** option from the menu and then **Change Customer ID**. The *Change Customer Contract No.* screen will display.



Change Customer Contract No.

Customer

 Customer ID: 1234567 

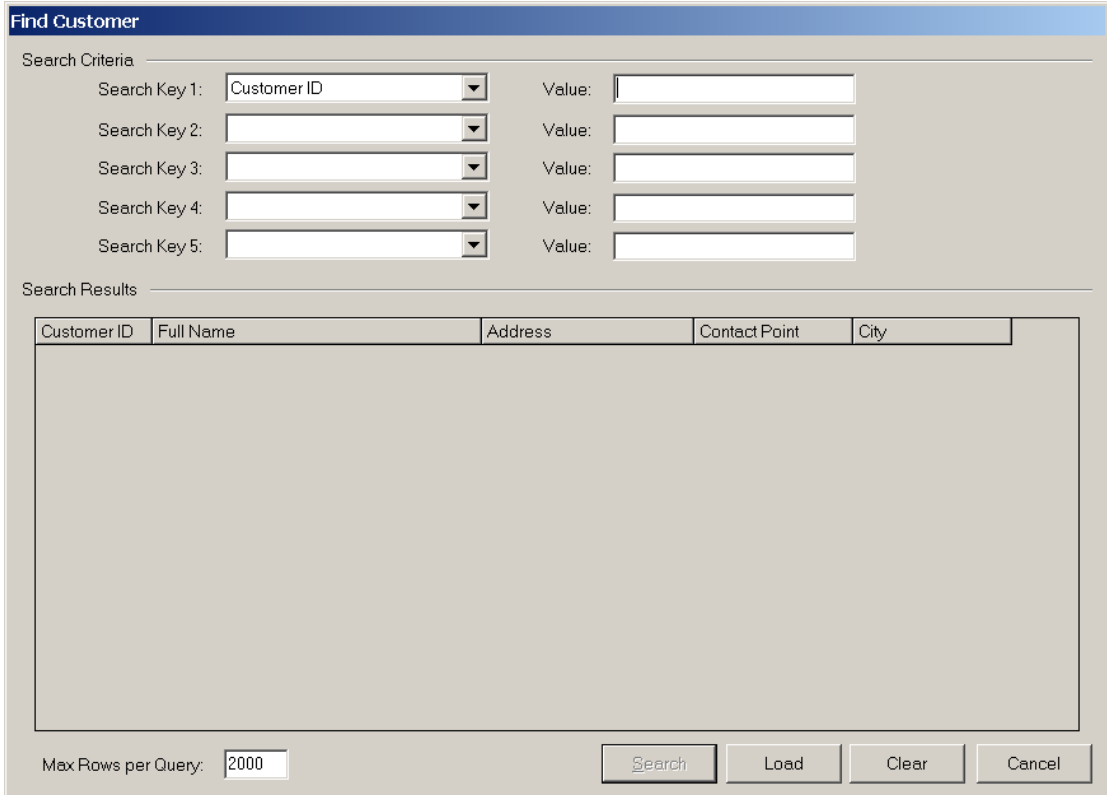
Name: Joe R. User

New Customer ID:

Change Close

Change Customer ID form

2. If the **Customer ID** is known, enter it into the *Customer ID* field. If the ID is unknown, click on the magnifying glass next to the *Customer ID* field to search for the customer. The *Find Customer* screen will display.



The screenshot shows a 'Find Customer' search screen. It has a title bar 'Find Customer' in blue. Below it, the 'Search Criteria' section contains five rows of search keys. 'Search Key 1' is set to 'Customer ID'. Each key has a corresponding 'Value' text box. Below this is the 'Search Results' section, which contains a table with five columns: 'Customer ID', 'Full Name', 'Address', 'Contact Point', and 'City'. The table body is empty. At the bottom, there is a 'Max Rows per Query' field set to '2000' and four buttons: 'Search', 'Load', 'Clear', and 'Cancel'.

Customer ID	Full Name	Address	Contact Point	City
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Find Customer search screen

- Within the *Search Criteria* section of the screen, select a **Search Key** from the drop-down menu and enter in a **Value**. If search values are unknown, enter an asterisk (\*) into the search field.
  - Click the **Search** button. Customers that meet the search criteria will display under the *Search Results* area of the screen.
  - Click on the correct customer name within the search results provided.
  - Click the **Load** button. The *Change Customer Contract No.* screen will display with the selected Customer's ID and name.
3. To change the Customer Contract Number/Customer ID, enter in the new Customer ID into the *New Customer ID* field on the *Change Customer Contract No.* screen.
  4. Click the **Change** button.
  5. Verify the password and click **OK**.
  6. Confirm the Customer ID change by clicking **OK** on the *Confirm Customer ID* change box.

## Unsuccessful Change Error

If the New Customer ID number was not successfully changed, an error screen may appear. Possible reasons for an error include the following:

- A unique Customer ID was not entered - retry the change using a confirmed unique Customer ID
- An alarm is queued for the customer whose ID you are attempting to change - retry once the alarm is cleared from the queue

## Deleted Customers

The *Deleted Customers* form displays customers that have recently been deleted from the Manitou system but have not yet been purged from the database. The function also enables the Operator to view and filter the deleted customer's logs.

Customer Deletions

Date From: 05/04/2007 Date To: 06/04/2007 Customer ID (Optional):

Search

0101 - Matt B  
01-01-3456 - Safe Harbour  
01-02-1234 - Safe Harbour

Details

Deleted: 05/11/2007 13:40  
User Initials: GMB  
Customer ID: 0101  
Name: Matt B  
Dealer:  
Branch:  
Country: United States of America  
Language: English (United States)  
Timezone: Mountain Time (US & Canada)  
Delete Code: -1  
Reason:

Deleted Customers form

The *Deleted Customers* form is divided into three sections: Details, Logs, and Filter. Each section may be selected from the appropriate tabs at the bottom of the form.





Deleted Customers form tabs

## Details

The *Details Page* is automatically loaded when the *Deleted Customers* form is selected. This page consists of a date range area with an optional Customer ID field and a Search button.

By entering search parameters, users may find specific deleted customers within a **Date Range** or by **Customer ID**. Once the search is completed, a list of customers will appear in the *Deleted Customer* list located to the left of the form.

A screenshot of the 'Deleted Customers Details' tab. The form is titled 'Customer Deletions' and includes a search area with 'Date From' (05/04/2007), 'Date To' (06/04/2007), and 'Customer ID (Optional)' fields, along with a 'Search' button. On the left, a 'Customer List' is displayed, showing three entries: '0101 - Matt B', '01-01-3456 - Safe Harbour', and '01-02-1234 - Safe Harbour'. The first entry is selected. To the right, the 'Details' section for the selected customer is shown, including fields for 'Deleted' (05/11/2007 13:40), 'User Initials' (GMB), 'Customer ID' (0101), 'Name' (Matt B), 'Dealer', 'Branch', 'Country' (United States of America), 'Language' (English (United States)), 'Timezone' (Mountain Time (US & Canada)), 'Delete Code' (-1), and 'Reason'.

Deleted Customers Details tab

Select a customer from the *Deleted Customer* list. The customer's information will be displayed in the fields to the right of the list.

## Logs

The *Logs* form displays the customer logs pertaining to the particular customer selected on the details form. This information is complete up until the time the customer was deleted. The deleted customer's log is stored in order to comply with UL standards and will remain in

the system until the record is purged. Users may add a comment to the deleted customer's log.

To add a comment, click on the **Comment** button and enter the details in the dialogue box.

## Filter

Users can filter through the *Deleted Customers* list by clicking on the *Filter* tab at the bottom of the screen and entering search parameters.

Users can filter deleted customers by:

- Date and Time
- Log Record Type
- Standard Event Type
- Associated Objects
- Event Categories
- Other (Transmitter, Point ID, User Initials, etc.)

**Date and Time**

Date From: 05/29/2007 Time: 00:00:00  
 Date To: 06/29/2007 Time: 23:59:00  
☐ Reverse ☐ Time Range  
 Time Zone: Mountain Time (US & Canada)

**Other**

Transmitter:   
 Area:   
 Zone:   
 Receiver Line Prefix:   
 Transmitter ID:   
 Resolution Code:   
 Event Source:   
 Point ID:   
 User Initials:   
 Original Event Code:   
☐ Policed  
☐ False Alarms  
☐ Except  
 Display Format: Standard View

**Log Record Type**

☐ Signal  
☐ Alarm  
☐ Viewed  
☐ Action  
☐ Response  
☐ Reverse Command  
☐ Confirmation  
☐ Signal Ignored  
☐ Caller ID Info

**Standard Event Types**

☐ \*\* Unknown Event  
☐ \*1 GSM Link Fail  
☐ \*2 GSM No Response  
☐ \*3 Land Line Link Fail  
☐ \*4 Land Line No Res...  
☐ \*5 GSM Resp OK  
☐ \*6 Land Line Resp OK  
☐ \*7 GSM Remote Lin...

**Associated Objects**

☐ Video  
☐ Audio  
☐ Finger Print  
☐ Eye Scan  
☐ Picture/Photograph

**Event Categories**

☐ ACCESS Access Alarms  
☐ BURG Burglary  
☐ EMERG Emergency  
☐ ENV Environmental AL...  
☐ FIRE Fire Alarm  
☐ GEN General Alarms  
☐ HOLDUP Holdup / Person...  
☐ MEDIC... Medical Alarms  
☐ NETAL... Network Alarm  
☐ OPEN / Close

Search Clear

Deleted Customer Filter form

Once the parameters are entered, click the **Search** button to filter the deleted customers. Customers that meet the filter parameters will be displayed on the main *Deleted Customers* screen.

## Other Records

Finding and editing records within Manitou is a simple process and in most cases, the same steps can be taken to edit or remove a record from the system.

### Locating an Existing Record

To search for existing records, the wildcard search is the quickest and most effective way of searching the databases.

1. Select the record type from the *Maintenance* menu - Customer, Dealer, Authority, etc. The appropriate form will appear.

The image shows a 'Record form example' with tabs for View, New, Edit, Delete, Save, and Cancel. The form is divided into several sections: Agency (Agency ID, Name, Type), Address (Zip Code, State, City, Street 1, Street 2, Country, Language, Time Zone), Contact (Site, Home, Business, Mobile), E-mail (E-Mail), and Web (Web Address). A 'Jump To:' dropdown menu is on the right, listing options like Agency, Options, Contact List, Call Lists, Attentions, Comments, General Schedule, and Maintenance Iss.

Record form example


2. On the form, click the magnifier button to the right of the **Authority ID** field.
3. Select the parameters from the **Search Key** fields and enter the **Values** or use an asterisk (\*) or double asterisk (\*\*) then click the **Search** button.

The image shows a 'Find Authority' search window. It has a 'Search Criteria' section with five 'Search Key' fields and corresponding 'Value' fields. The first search key is 'Authority ID' with a value of '\*'. Below this is a 'Search Results' section displaying a table of results. The table has columns for Authority ID, Full Name, Type, Address 1, City, and Region. The results list various fire departments, medical assistance, and police authorities. At the bottom, there is a 'Max Rows per Query' field set to 2000, and buttons for Search, Load, Clear, and Cancel.

Authority ID	Full Name	Type	Address 1	City	Region
CSFD	Colorado Springs Fire Department	Fire	1911 Memorial Drive	Colorado Springs	Colorado
CSMD	Colorado Springs Medical Emergency	Medical	511 County Blvd	Colorado Springs	Colorado
CSPD	Colorado Springs Police Department	Police	911 County Road	Colorado Springs	Colorado
GFIRES	Fire Emergency	Fire	Fire 16 04 13	Frankfurt	Germany
GMED	Medical Assistance	Medical	Medical 22 05 34	Frankfurt	Germany
GPOL	Police Authority	Police	Police 12 06 48	Frankfurt	Germany
RCMP	Royal Canadian Mounted Police	Police			
UKFB	UK Fire Brigade	Fire			
UKMED	UK Medical Assistance	Medical			
UKPOLICE	UK Police	Police			
VFD	Vancouver Fire Department	Fire			
VMD	Vancouver Medical Assistance	Medical			

Wildcard Search example

4. Select the record to load from the search results then click the **Load** button. The selected record will now be displayed.

 *Regarding Dealer record searches - When the **Use Master** box is checked on a sub-dealer's master file, the Master dealer's name and address information is displayed on the alarm screen for accounts that belong to the sub-dealer.*

## Editing an Existing Record

1. Find and then display the appropriate record as described above.
2. Click the **Edit** button at the top of the Application area of the screen.
3. Modify any editable information within the record.
4. Use the radio buttons located to the right of the form to move to the various pages of the record.
5. When finished editing, click **Save**, add any notes then click **OK** to store the changes in the database.

💡 **Once saved, all changes to a record are permanent.**

## Removing an Existing Record

1. Locate and load the appropriate record.
2. Click the **Delete** button located at the top of the Application area of the screen.
3. Confirm the deletion with valid password and click **OK**. The record will be removed from the system.

💡 **There is no way to reverse a deletion within the Manitou system. If a record has been deleted in error, it must be re-created as a new record to be put back in to the system.**

## Logs


Manitou CS 2.0.0 uses logs to help customers track account and alarm activity. These logs are set up to be easily access and utilized through search and filter options.

### System Log

The *System Log* provides users with details of Operator log in and log out activity. Users can also view activities with the Report Server, Publisher, and Watchdog Messages.

Open the System Log (*Tools* Menu > **System Log**). The screen will display the current day's activities for up to 300 entries.

System Activity Log

 [More](#)

System Log 7 Records:

	Date/Time	Category	Qualifier	Event Text	User ID
▶	11/19/2010 13:34	Log On/Log Off	Logged On	Bold Technologies	BOLD
	11/19/2010 13:17	Log On/Log Off	Logged Off	Bold Technologies	BOLD
	11/19/2010 13:13	Log On/Log Off	Logged Off	Bold Technologies	BOLD
	11/19/2010 13:13	Log On/Log Off	Logged Off	Bold Technologies	BOLD
	11/19/2010 10:14	Log On/Log Off	Logged On	Bold Technologies	BOLD
	11/19/2010 10:14	Edits	Workstations	Add 4 - Pending	BOLD
	11/19/2010 10:14	Edits	Workstations	Add 3 - Pending	BOLD

Logs [Filter](#)

System Log

If more than 300 entries are available, the **More** button will be enabled (clicking it will display additional entries).

To refresh the list, click the **Refresh** button




## Search and Filter Log

It is possible to search and filter the System Logs to locate specific information or group certain logged activities together.


### Filtering the System Log

1. To filter System Logs, click the *Filter* tab at the bottom of the *System Logs* window. The *Filter* form appears.

**Date and Time**

 Date From: 05/16/2011 Time: 00:00:00  
Date To: 05/16/2011 Time: 23:59:00  
☒ Reverse ☐ Time Range ☐ Except Time  
Time Zone: Mountain Time (US & Canada)

**Other**

 Category:  ☐ Except Category  
Qualifier:  ☐ Except Qualifier  
User Id:  ☐ Except User

Search Clear

System Logs Filter form

2. Select the filter parameters and click the **Search** button. The results will appear in the main *System Logs* screen.

## Searching the System Log

Searches can also be performed on the System Log to locate specific data.


### Date and Time Searches

**Date and Time** parameters can be set using the drop down boxes in the date and time area of the filter display. Following are some notes on the Date and Time searching functionality.

- To restrict the search results to an **exact** time, input that time in the Time field and click the "Time Range" checkbox.
  - To exclude a Date and/or Time, select the date or time to be excluded in the search and click the "Except Time" checkbox
  - You may notice that the **Reverse** checkbox is checked by default. This returns the search with the most recent activity at the top of the list. Un-checking this box will return the search with the oldest activity at the top of the list.
- When ready to search using the criteria you specified, click the **Search** button. If you want to clear the date range, etc. click the **Clear** button.

## TimeZone Searches

Central stations that have operations spanning several time zones may wish to use the **Time Zone** search field.

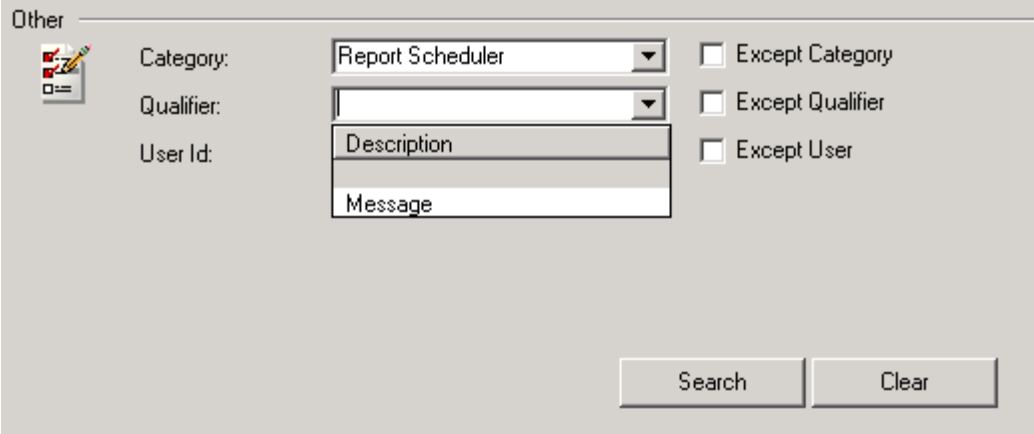
 Any Daylight Savings time settings are automatically updated by the Manitou system clock.

## Other Searches

There are additional search fields in the *Other* section of the *System Log Filter* form including **Category**, **Qualifier** and **User Id**.

- The *Category* field includes such items as **Log On/Off**, **Report Server**, **Publisher**, etc. When a Category is selected as part of the search, additional options can appear in the *Qualifier* field. These additional search parameters are subsets of the *Category* field and help qualify a search - i.e., further specify the Category item you selected.

For example, when you select the **Report Scheduler** in the *Category* field, you are given the option to search for **Messages** in the *Qualifier* drop-down menu as well, as seen here:



The screenshot shows a window titled "Other" with a search icon. It contains three main input fields: "Category:", "Qualifier:", and "User Id:". The "Category:" dropdown is set to "Report Scheduler". The "Qualifier:" dropdown is open, showing "Description" and "Message" as options. To the right of these fields are three checkboxes: "Except Category", "Except Qualifier", and "Except User". At the bottom right are "Search" and "Clear" buttons.

Other, Category search

Likewise, selecting **User Messages** in the *Category* menu gives the user **Broadcast**, **User** or **User Group** search options in the *Qualifier* menu:





Other

Category: User Messages

Qualifier: Description

User Id: Broadcast  
User  
User Group

Search, User Messages

Users can also search for a specific Operator's activity by entering the **Operator's ID** into the *User ID* field.

Each of the Other fields contains an **Except** checkbox. When selected, these **Except** checkboxes exclude the selected item from the search.

**Example:** If you chose **Edits** from the Category field, then **Company** in the Qualifier field and then clicked the "Except Qualifier" checkbox, your search would look for all Edits logs EXCEPT for logs relating to a Company.

## Raw Data Log

The *Raw Data Log* provides alarms and other signal detail from the alarm receivers connected to the Manitou system. The data is displayed in the original format received by the Front End Processor(s) (FEP). The *Raw Data Log* is primarily used for diagnostics, but can be useful in tracing a particular signal or group of signals from a particular customer.

To access the **Raw Data Log**, select it from the *Tools* Menu.

Initially, all raw data received by the FEP during the current date is displayed. Up to 300 entries will be displayed and may be viewed by scrolling up and down using the scroll bar. In the event that more than 300 records are available, the **More** button will be enabled (clicking on it will display additional entries).

The screenshot shows the 'Raw Data Activity Log' window. At the top, there is a search criteria section with fields for Date From (02/06/2007), Date To (02/06/2007), Time (00:00:00 to 23:59:00), Rec. Line Prefix, TX ID, and checkboxes for Reverse and Time Range. A Time Zone dropdown is set to 'Mountain Time (US & Canada)'. Search and More buttons are at the bottom right of this section. On the left is a tree view labeled 'FEP list' containing various REC items like 'REC 3 - MX 8000 - 9800 mode 1', 'REC 4 - Bold IP Receiver 1', 'REC 5 - DMP 1', etc. On the right is a table titled 'Raw Data Log: 2 records' with columns: Date/Time, FEP No., Rec. No., Line No., Rec. Code, Event Data, Rec. Line, and TX ID. Two records are shown, both with Date/Time '02/06/2007 13:12:09', FEP No. '1', Rec. No. '5', Line No. '1', Rec. Code 'DMP', Event Data '25F0101 2179 Zq\062\t "OP\w', Rec. Line '00', and TX ID '2179'. Red boxes highlight the search criteria area, the FEP list, and the search results table. Arrows point from labels to these areas.

**Search criteria**

**FEP list**

**Search results**

Date/Time	FEP No.	Rec. No.	Line No.	Rec. Code	Event Data	Rec. Line	TX ID
02/06/2007 13:23:41	1	5	1	DMP	25F0101 2179 Zq\062\t "OP\w	00	2179
02/06/2007 13:12:09	1	5	1	DMP	25F0101 2179 Zq\062\t "OP\w	00	2179

Raw Data Log

## Date and Time Searches

*Date and Time* parameters can be set using the drop down boxes in the date and time area of the filter display.

- To restrict the search results to an **exact** time, input that time in the Time field and click the **Time Range** checkbox.
- To exclude a date and/or time, select the date or time to be excluded in the search and click the **Except Time** checkbox
- You may notice that the **Reverse** checkbox is checked by default. This returns the search with the most recent activity at the top of the list. Un-checking this box will return the search with the oldest activity at the top of the list.

When ready to search using the criteria you specified, click the **Search** button. If you want to clear the form, click the **Clear** button.

## FEP List

The *FEP list* is displayed on the left hand side of the *Raw Data Log* window.

Raw Data Activity Log

Date From: 05/16/2011 Time: 00:00:00 Rec. Line Prefix  
Date To: 05/16/2011 Time: 23:59:00 TX ID:  
☒ Reverse ☐ Time Range  
Time Zone: Mountain Time (US & Canada) Search More

FEP 1 - FEP  
REC 1 - Surgard  
REC 2 - BoldXML 1  
REC 3 - OzVision 1

Date/Time	FEP No	Rec No	Line No	Rec Code	Event Data
-----------	--------	--------	---------	----------	------------

Raw Data Log, FEP list

The FEP list shows all installed FEPs and corresponding receivers (REC) and can help in identifying all available raw data acquired by the Manitou system.


When searching for specific data, users may select a FEP and all sub-items (receivers, lines, etc.), or a specific receiver or line, etc. Users can also search for one specific transmitter ID by inputting the ID in the **TX ID** field.

05/16/2011 Time: 00:00:00 Rec. Line Prefix  
05/16/2011 Time: 23:59:00 TX ID:  
☒ Reverse ☐ Time Range  
Mountain Time (US & Canada) Search More

*Users may only search with one parameter at a time (e.g., can only select one FEP at a time).*

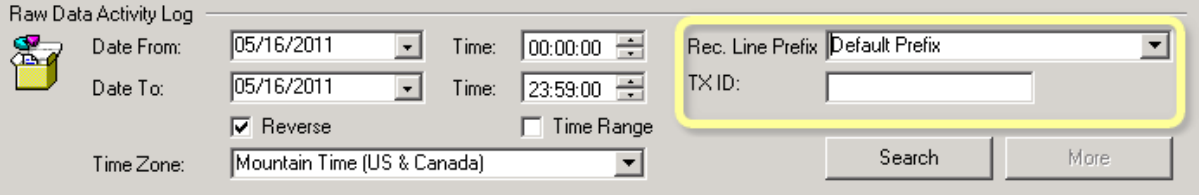
## Time Zone Searches

Central stations that have operations spanning several time zones may wish to use the **Time Zone** search field.

 Any Daylight Savings time settings are automatically updated by the Manitou system clock.

## Receiver Line Prefix and TX ID Searches

Users may specify a particular Receiver Line Prefix (**Rec. Line Prefix**) or a Transmitter ID (**TX ID**) to search for in the raw data. Select the Receiver Line Prefix from the pre-populated drop-down menu, or enter the Transmitter ID into the text field.



Rec. Line Prefix and TX ID fields

When ready to proceed click the **Search** button.

## Dealer Takeover

Dealer Takeover is a function that moves all of the customers (and sub-Dealers) of one dealer, to another. Information such as transmitter types allowed, control panels allowed, and reverse protocols will be moved to the inheriting dealer. If the inheriting dealer does not have a system account and the original dealer does, the inheriting dealer will inherit the system account. Likewise, the last week of alarm and signal activity will be copied to the inheriting Dealer's system account. If both dealers have system accounts, the original dealer's system account will be deleted.


- ⚠ **Once a Dealer Takeover is performed, it cannot be undone. Use extra care when doing performing Dealer Takeovers.**




In order for the Dealer Takeover to be active, the correct permissions must first be set up in the Supervisor Workstation profiles. In the Supervisor Workstation, select **Maintenance > Setup > Permissions**. Determine what profiles (Administrator, Operator, etc.) should be allowed to utilize Dealer Takeover. Set the permissions to Visible/Enabled, and save the changes.

 Users must log out and log back in to OWS in order for changes to take place.

1. When ready to proceed, open the Dealer Takeover function (**Tools** Menu and then **Dealer Takeover**)

**Dealer Takeover**

Password   (Type password and press the Enter key)

Dealers  Source Dealer ID:    
Destination Dealer ID:  

Customers


Customer ID	Name	Delete Status
-------------	------	---------------


Takeover Cancel


Dealer Takeover form


2. Enter the user's password, and press the **Enter** key on the keyboard. This will enable the dealer search functionality forms.

**Dealer Takeover**

Password  \* (Type password and press the Enter key)

Dealers 

Source Dealer ID:   AAA Alarm Security Services

Destination Dealer ID:  

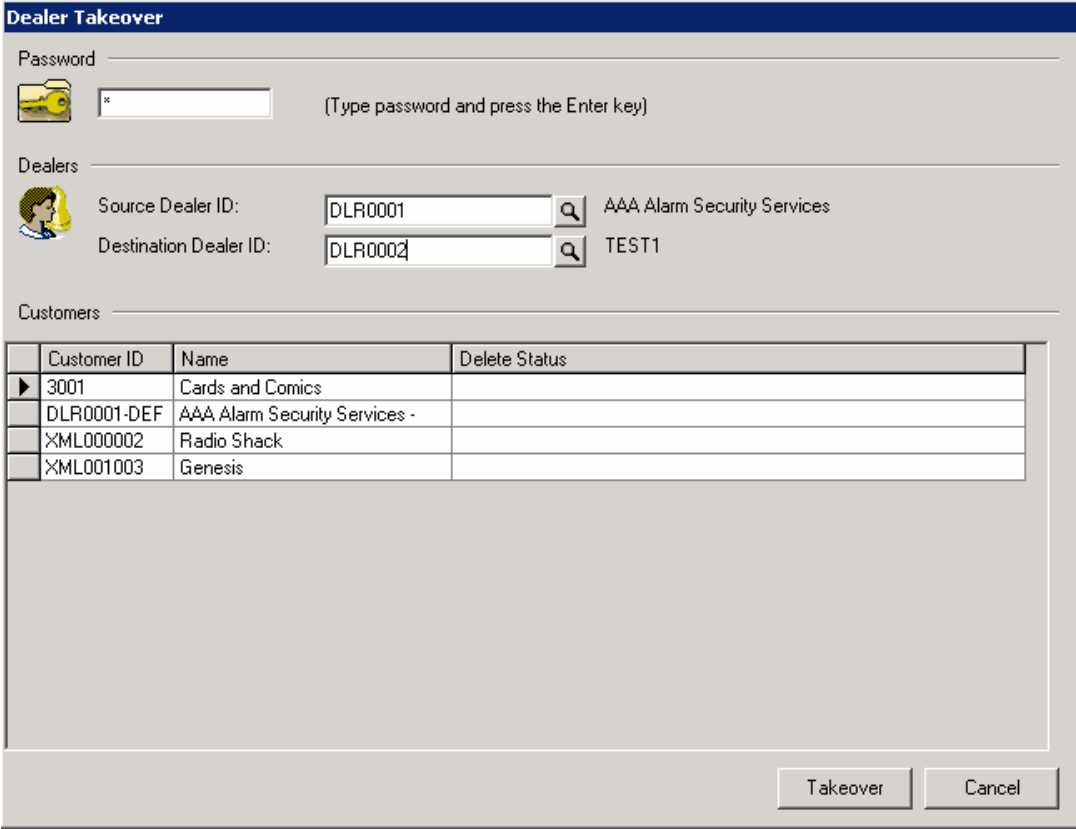
Customers

	Customer ID	Name	Delete Status
▶	3001	Cards and Comics	
	DLR0001-DEF	AAA Alarm Security Services -	
	XML000002	Radio Shack	
	XML001003	Genesis	

Takeover Cancel

Source Dealer ID field

3. Select the **Source Dealer ID** (the dealer that is being taken over). Then, select the **Destination Dealer ID** (the Dealer that is taking over that dealer's accounts). If needed you can use the magnifying glass search function to locate the dealers in question.



The **Dealer Takeover** dialog box contains the following sections:

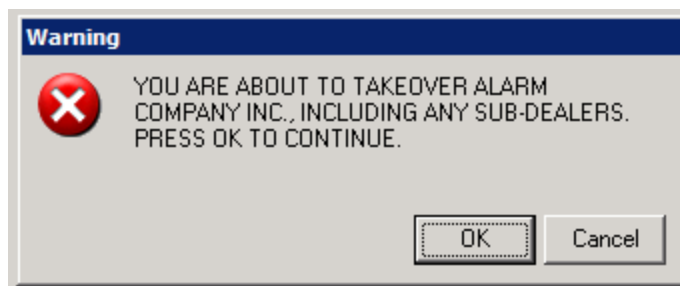
- Password:** A text field with a key icon and a placeholder asterisk (\*). Below it is the instruction: (Type password and press the Enter key).
- Dealers:** Contains two rows of information:
  - Source Dealer ID: DLR0001 (with a magnifying glass icon) AAA Alarm Security Services
  - Destination Dealer ID: DLR0002 (with a magnifying glass icon) TEST1
- Customers:** A table with the following data:

Customer ID	Name	Delete Status
3001	Cards and Comics	
DLR0001-DEF	AAA Alarm Security Services -	
XML000002	Radio Shack	
XML001003	Genesis	

At the bottom right are **Takeover** and **Cancel** buttons.

Destination Dealer ID field

- Click the **Takeover** button to begin taking over the Source Dealer's accounts. A warning will appear.



Dealer Takeover warning

- If you are certain that you wish to proceed, click **OK** to continue the takeover.

## UL Requirements

For a UL facility, certain requirements must be met to in order to satisfy UL certification. This section covers those requirements.

## UL Addendum 1.4.7-2

In compliance with UL requirements for documentation, this UL Addendum contains the following sections:

- Revision History
- UL Alarm Ticket
- UL Required Reports
- UL Required Signal Priorities
- Manitou System Configuration
- Replication Switchover Procedure
- Manitou Remote Access
- UL Alarm Handling Summary - Operation

Additionally, this UL Addendum contains excerpts from the UL 1981 Standard for central station Automation Systems, describing the necessary components a central station must have to maintain UL 1981 compliance. For further information please refer to the referenced sections of the UL 1981 Standard for central station Automation Systems.

### UL Alarm Ticket

This section has been included in accordance with UL 1981 Paragraph 19.8, items a through p, which lists the requirements of an on-demand alarm report for non-certificated systems. The report shall include the following items, as applicable:

1. Name and address of subscriber (fire/burglary).
2. Type of alarm (burglary, hold-up, fire).
3. Grade of service (burglary).
4. Time alarm received by the central station receiver (fire/burglary).
5. Time police/fire department notified and police/fire department identification number (fire/burglary).
6. Time alarm investigator No. 1 dispatched, name and employee ID (fire/burglary).
7. Time alarm investigator No. 2 (if any) dispatched, name and employee ID (fire/burglar).
8. Time alarm investigator No. 1 arrived (fire/burglary).



9. Time alarm investigator No. 2 arrived (if dispatched) (fire/burglary).
10. Elapsed time between the receipt of the alarm signal at the central station and the investigator's arrival at the protected premises.
11. Method used to verify alarm investigator's arrival such as radio, telephone, or the like (fire/burglary).
12. Whether the central station holds keys.
13. Whether keys were used or not used (fire/burglary).
14. Time subscriber notified, name of subscriber notified (may need 2 or 3 lines for multiple notifications) (fire/burglary).
15. Disposition of alarm (fire/burglary).
16. Whether a sounding device is used on the system.

By running the Alarm Detail report for a specific day (date), an Operator can look up alarm numbers on which to run the Alarm Detail by Alm Num report. This report contains all of the requirements above and may be run on-demand by Operators.

All UL Certificated Customers must have an Action Pattern that gathers the following information:

1. Authority responding to the alarm (Fire Department, Police Department, etc.)
2. Alarm Investigator (Agency) responding to the alarm (Guarding Agency, Inspection Agency, etc.)
3. Verification of contact with the Customer or a Keyholder on the account
4. Attention field denoting whether or not the central station possesses keys for the Premises.

**WARNING:** If the above items are not gathered, the Alarm Ticket does not satisfy UL 1981 requirements.

## UL Alarm Handling Summary - Operation

### Logging in to Receive Alarms

An Operator logs into the Manitou Client and brings up the Alarm Handling screen, either by clicking on the icon or by selecting Operations>>Alarm Handling. The "New Alarms", "Viewed Alarms", and "Auto-Get Alarms" under "Operations" should already be selected (there are check marks by those options).

A newly arrived alarm appears on screen – for this example, it's a Fire Alarm.

**Customer Info**  
 ANNIE - Annie Lennox  
 10 TENTH STREET  
 New York  
 NY 11111  
 Cross Street: N/A  
 Subdivision: N/A

**Dealer Info**  
 DLR1 - Dealer 1  
 204 Leicester Crescent  
 Great Tew  
 Oxfordshire  
 OX9 1PL

**Alarm Info**  
**Fire Alarm**  
 Priority: 1  
 Time: 01/28/2003 15:19  
 Area: 1 Zone: 1  
 Rec. Line: 100 TX ID: 2121  
 Point ID: Front Door

**Customer Log**

Date	Time	Log Description	User
01/28/2003	15:19:14	ALARM (Manual) - Fire Alarm (FA) Front Door TX: 1 A, 1 Z, 1	
01/28/2003	15:19:18	VIEWED - Fire Alarm (FA) - Response [4 Secs]	MH

**Actions**  
 Status: In Alarm(1)  
 Customer: Active - 10/31/2002 17:21  
 TX Line 1: OK  
 On-Test: Full Service  
 Area 1: Open - 11/12/2002 15:06

**Action Pattern - CFR**  
 Action Patterns: View All Contacts

0	CONTACT ANNIE LENNOX USING CALL LIST 'CUSTOMER FIRE
0	CONTACT ANNIE LENNOX AT E-MAIL 'ANNIE@LENNOX.COM'

**Customer Log**  
 Week

Alarm - 1 Plans - 2 Schedule - 3 Alarm Report - 4 Notes - 5 Trans. Status - 6

## Checking Status

The Alarm Handling screen shows the customer's current status in the upper right corner. Use the radio buttons to switch between Status and Comments screens. At the very bottom of this pane is a Notes tab that should be checked. If it's yellow, there's a note associated with this customer. To view more customer information, click the other tabs, scroll through the Customer Log for signal details, or click on the Customer Info and/or Dealer info buttons on the left.

## Performing Actions

The Action Pattern associated with a Fire Alarm for this customer is directly under the Customer information on the right side of this screen. The first item has an arrow to the left of the line and is ready to be "actioned" – 'Contact customer using Call List 'Customer Fire (CFR)'.

There are three ways to start working on the action:

1. Press the 'd' key on the keyboard (for "do")
2. Use the mouse to select 'Do' from the tool bar.
3. Double-click the first line of the Action Pattern.

The Operator will use one of these three methods to perform each action within the Action Pattern list and sub-lists.

Double-Clicking the first item, “Contact customer using Call List Customer Fire (CFR)” opens a sub-list with three items – Contact the customer, contact the Fire Department and contact the primary Keyholder. Double-clicking on the first item opens the Auto-Dialer, connecting Manitou to the phone system, and dialing out to make the first contact. The customer tells the Operator that the Fire Alarm signal was a false alarm, and gives a password to verify this information. Click ‘Finish’ to close the auto-dialer window. Type the customer’s password into the first field, click Enter to validate, and type comments into the text field. Check the boxes for Cancel Alarm and Close Alarm. Use the drop-down fields to select a Resolution Code – in this case ‘FA’ for False Alarm. Click ‘Validated’ and the alarm is closed. All comments are entered into the Customer Log. The Operator is returned to the Alarm Handling screen and is available to receive the next alarm in the queue.

### **Additional Information**

In the above example, the Operator did not need to contact and dispatch the Fire Department or contact the Dealer (the second and third items on the Call List). Instead, the system closed the alarm and recorded the information that it was a False Alarm.

In other situations, where there are multiple contacts to make or actions to perform, each contact will be handled similarly until every contact or action in the Action Pattern has been completed. If a contact is unavailable or unreachable, the system or the Operator will note that before moving on to the next action. If necessary, the Operator may use the ‘View All Contacts’ radio button (next to Action Patterns) to select other contacts, or get alternate numbers.

### **Deferred Alarms**

If the alarm is not handled within the required time-out period (varies for each alarm type) the system will prompt the Operator that the alarm is about to be deferred. A deferred alarm returns to the queue and is forwarded to the next available Operator. An Operator who is busy may choose to manually defer an alarm, to allow another Operator to handle it.

### **Suspended Alarms**

An Operator may also choose to suspend an alarm, if necessary while performing other tasks. Selecting Hold>>Suspend brings up a prompt box. The Operator selects the time period for which the alarm will be suspended. When that time expires, the system prompts the Operator again to handle that alarm.

## **UL Required Reports**

In compliance with UL specifications, detailed in the UL 1981 Standard for central station Automation Systems, Manitou is capable of producing the following on-demand reports, each of which is described in a previous section of this manual:

- [Alarm Detail](#)
- [Alarm Detail by Alarm Number](#)

- [Master File report sorted by UL Certificated Accounts](#)
- [Customer Status - Active/Inactive](#)
- [Receiver Line Loading - accounts on each receiver ID](#)

## Alarm Detail

The Alarm Detail report satisfies all requirements of UL 1981 Paragraph 19.8, items a through p, which lists the requirements of an on-demand alarm report for non-certificated systems. See Section 7.02 - UL Alarm Ticket for more information.

This report satisfies one of the documentation and reporting requirements of UL 1981. Please see Appendix section 7.02 - UL Required Reports for more information.

Follow the instructions below to run an Alarm Detail report:

1. Select Maintenance>>System Reports.
2. Select the Alarm Detail Report by clicking it in the Report navigator on the left edge of the System Reports screen.
3. Tab or click into the Report Description field and enter a detailed description for the report. It is important to be descriptive so that this report may be easily identifiable in the Report Queue.
4. On-demand reports default to a priority level of 5. However, if the report needs to be processed more quickly than other, less important reports, use the UP arrow to select 4, 3, 2, or 1, giving the report a "higher" priority.
5. Select the necessary details within one or more applicable fields, as described below. (It is possible to enter information in a single field or in many fields depending on how specific the resulting report information should be.)

### Contract ID

1. Enter the Contract ID (Account Number) into the left-hand From field or use the Search icon to locate the customer record.
2. Tab or Click into the To field. The From Contract ID number automatically loads into the To field. If the report is for only the one customer record leave the field as is. If the report is for a range of customer records enter the last Contract ID number in the range or click the Search button to locate the customer account. Remember, the wider the range the larger report and therefore the longer the processing time.

### Customer Name

1. If the Contract ID is not necessary and the desired result of the report is to get all accounts containing a particular customer name, enter that name into the From

Customer Name field.

2. Tab or Click into the To field, the customer name entered in the From field automatically loads into the To field. If this is correct, leave it as is, if not, enter the last name in the range into this field.

### **Dealer ID**

1. To get activity information based on Dealers that establish the accounts tab or click into the Dealer ID From field and enter the Dealer ID number into the field or use the Search button to locate the Dealer name.
2. Tab or Click into the To field. The Dealer Number entered into the From field automatically loads into the To field. If this is correct, leave it as is, if not, enter the new Dealer ID or use the search icon to find the Dealer ID.

### **Group**

1. Group codes can help define the Customer Activity for reporting purposes. Enter the Group Code or click the drop-down arrow to the right of the From field and select the group from the list.
2. Tab or Click into the To field, the selected Group code loads automatically into the To field. If this is correct, leave it as is, if not, enter or select the ending Group code into the To Field.

### **Class**

1. Class codes can also help define the customer activity for reporting purposes. Enter the Class Code or click the drop-down arrow to the right of the From field and select the group from the list.
2. Tab or Click into the To field, the selected Class code loads automatically into the To field. If this is correct, leave it as is, if not, enter or select the ending Class code into the To Field.

### **Zip/Post**

1. The Zip or Postal code can help further define the specifics of a search. Tab or click into the From field and enter the zip/postal code for this report.
2. Tab or Click into the To field, the entered zip/postal code automatically loads into the To field. If this is correct, leave it as is, if not, enter the proper zip/postal code.

### **Activity Date/Time**

1. Use the drop-down arrow to the right of the From Date field and select the From date for the report.
  2. Tab or click into the Time field and set the From time by typing it in or using the up/down arrows.
-

3. Use the drop-down arrow to the right of the To Date field and select the From date for the report.
4. Tab or click into the Time field and set the To time by typing it in or using the up/down arrows.

### **UL Grades**

To include Alarm Details only within customer accounts with specific UL Grades, use the checkboxes. If nothing is selected the system will disregard this parameter.

### **Dispatched**

1. Use the radio buttons to specify which alarms to include - all, Dispatched or Not Dispatched.
2. Upon entering all the parameters necessary to produce the Unrestored Signals Report, Click Next.
3. The next page contains distribution destinations. Upon load, if a customer was selected on the previous page, the customer contacts load with printer, fax and email contact information.
4. Select the publishing destinations in the left-hand window on the lower left of the distribution form. Either double click the item to move it to the right or click the right arrow [>]. If all destinations are required click the double right arrow button [>>] to move all destinations. If any items are moved in error select the item and either double click or click the left arrow [<] to move the arrow back to the left-hand frame or the double arrow [<<] to move them all.
5. There are times when some destinations are not on the customer record the top section of the form is designed to allow the addition of non-listed destination. Tab or click into the Override recipient's name field and enter the name of the override recipient.
6. Click the drop-down list to the right of the Override destination type and select the type of destination. The choices are: Printer, Fax and Email.
7. Tab or click into the Override destination address (Fax/Email) and enter the Email address or Fax number.
8. Once all the override information is entered properly click the Add button
9. Repeat the above steps for all additional destinations.
10. Upon completion of all destinations and override destinations click Finish.
11. The system then pops up a notification that the message was properly queued and is running.

## Alarm Detail by Alarm Number

The Alarm Detail report satisfies all requirements of UL 1981 Paragraph 19.8, items a through p, which lists the requirements of an on-demand alarm report for non-certificated systems. See Section UL Alarm Ticket for more information. This report satisfies one of the documentation and reporting requirements of UL 1981. Please see Appendix section UL Required Reports for more information.

The Alarm Detail by Alarm Number report lists detailed activity by alarm number, showing Operator actions, comments and dispatch information. All activity performed on a single alarm will be included in this report.

1. Select Maintenance > System Reports.
2. Select the Alarm Detail by Alarm Number (Alarm Detail by Alm Num) Report by clicking it in the Report navigator on the left edge of the System Reports screen.
3. Tab or click into the Report Description field and enter a detailed description for the report. It is important to be descriptive so that this report may be easily identifiable in the Report Queue.
4. On-demand reports default to a priority level of 5. However, if the report needs to be processed more quickly than other, less important reports, use the UP arrow to select 4, 3, 2, or 1, giving the report a "higher" priority.
5. Select the necessary details within one or more applicable fields, as described below. (It is possible to enter information in a single field or in many fields depending on how specific the resulting report information should be.)

### Contract ID

1. Enter the Contract ID (Account Number) into the left-hand From field or use the Search icon to locate the customer record.
2. Tab or Click into the To field. The From Contract ID number automatically loads into the To field. If the report is for only the one customer record leave the field as is. If the report is for a range of customer records enter the last Contract ID number in the range or click the Search button to locate the customer account. Remember, the wider the range the larger report and therefore the longer the processing time.

### Date/Time

1. Use the drop-down arrow to the right of the From Date field and select the From date for the report.
2. Tab or click into the Time field and set the From time by typing it in or using the up/down arrows.
3. Use the drop-down arrow to the right of the To Date field and select the From date for

the report.

4. Tab or click into the Time field and set the To time by typing it in or using the up/down arrows.

### **Alarm Number**

1. To display all alarms within the Contract ID and Date range already indicated, leave the Alarm Number fields blank. To display a select alarm, or a range of alarm numbers, type the lowest alarm number into the first field.
2. Click or tab into the second Alarm Number field and type in the highest alarm number in the range.
3. The Alarm Number is the same as the Log Sequence Number found in the Alarm Detail report, or on the Log Details screen. To open the Log Details screen, open the Customer record for which this alarm occurred.
4. Click on the Logs button on the right side of the interface.
5. Scroll within the log information to find the alarm.
6. Double-click on the alarm row to open the Log Details. One of the entries there is the Log Sequence Number.
7. Upon entering all the parameters necessary to produce the Unrestored Signals Report, Click Next.
8. The next page contains distribution destinations. Upon load, if a customer was selected on the previous page, the customer contacts load with printer, fax and email contact information.
9. Select the publishing destinations in the left-hand window on the lower left of the distribution form. Either double click the item to move it to the right or click the right arrow [>]. If all destinations are required click the double right arrow button [>>] to move all destinations. If any items are moved in error select the item and either double click or click the left arrow [<] to move the arrow back to the left-hand frame or the double arrow [<<] to move them all.
10. There are times when some destinations are not on the customer record the top section of the form is designed to allow the addition of non-listed destination. Tab or click into the Override recipient's name field and enter the name of the override recipient.
11. Click the drop-down list to the right of the Override destination type and select the type of destination. The choices are: Printer, Fax and Email.
12. Tab or click into the Override destination address (Fax/Email) and enter the Email address or Fax number.



13. Once all the override information is entered properly click the Add button
14. Repeat the above steps for all additional destinations.
15. Upon completion of all destinations and override destinations click Finish.
16. The system then pops up a notification that the message was properly queued and is running.

## **Master File Report Sorted by UL Certificated Accounts**

This report satisfies one of the documentation and reporting requirements of UL 1981. Please see Appendix section UL Required Reports for more information.

The Master File report, reports all selected customer details for file maintenance.

1. Select Maintenance > System Reports.
2. Select the Master File Report by clicking it in the Report navigator on the left edge of the System Reports screen.
3. Tab or click into the Report Description field and enter a detailed description for the report. It is important to be descriptive so that this report may be easily identifiable in the Report Queue.
4. On-demand reports default to a priority level of 5. However, if the report needs to be processed more quickly than other, less important reports, use the UP arrow to select 4, 3, 2, or 1, giving the report a "higher" priority.
5. Select the necessary details within one or more applicable fields, as described below. (It is possible to enter information in a single field or in many fields depending on how specific the resulting report information should be.)

### **Contract ID**

1. Enter the Contract ID (Account Number) into the left-hand From field or use the Search icon to locate the customer record.
2. Tab or Click into the To field. The From Contract ID number automatically loads into the To field. If the report is for only the one customer record leave the field as is. If the report is for a range of customer records enter the last Contract ID number in the range or click the Search button to locate the customer account. Remember, the wider the range the larger report and therefore the longer the processing time.

### **Customer Name**

1. If the Contract ID is not necessary and the desired result of the report is to get all accounts containing a particular customer name, enter that name into the From Customer Name field.

2. Tab or Click into the To field, the customer name entered in the From field automatically loads into the To field. If this is correct, leave it as is, if not, enter the last name in the range into this field.

**Dealer ID**

1. To get activity information based on Dealers that establish the accounts tab or click into the Dealer ID From field and enter the Dealer ID number into the field or use the Search button to locate the Dealer name.
2. Tab or Click into the To field. The Dealer Number entered into the From field automatically loads into the To field. If this is correct, leave it as is, if not, enter the new Dealer ID or use the search icon to find the Dealer ID.

**Group**

1. Group codes can help define the Customer Activity for reporting purposes. Enter the Group Code or click the drop-down arrow to the right of the From field and select the group from the list.
2. Tab or Click into the To field, the selected Group code loads automatically into the To field. If this is correct, leave it as is, if not, enter or select the ending Group code into the To Field.

**Class**

1. Class codes can also help define the customer activity for reporting purposes. Enter the Class Code or click the drop-down arrow to the right of the From field and select the group from the list.
2. Tab or Click into the To field, the selected Class code loads automatically into the To field. If this is correct, leave it as is, if not, enter or select the ending Class code into the To Field.

**Commission Date**

1. Use the drop-down arrow to the right of the From Commission Date field and select the From date for the report.
2. Tab or click into the Time field and set the From time by typing it in or using the up/down arrows.
3. Use the drop-down arrow to the right of the To Commission Date field and select the From date for the report.
4. Tab or click into the Time field and set the To time by typing it in or using the up/down arrows.

**Create date**

1. Use the drop-down arrow to the right of the From Create Date field and select the From date for the report.

2. Tab or click into the Time field and set the From time by typing it in or using the up/down arrows.
3. Use the drop-down arrow to the right of the To Create Date field and select the From date for the report.
4. Tab or click into the Time field and set the To time by typing it in or using the up/down arrows.

**Last update date**

1. Use the drop-down arrow to the right of the From Last Update Date field and select the From date for the report.
2. Tab or click into the Time field and set the From time by typing it in or using the up/down arrows.
3. Use the drop-down arrow to the right of the To Last Update field and select the From date for the report.
4. Tab or click into the Time field and set the To time by typing it in or using the up/down arrows.

**Marked for reprint**

To include any customer accounts that are marked for reprint, click the checkbox.

**Sub-reports**

Select the additional items to include on the report by clicking the desired checkboxes to the left of the sub-report title.

Upon entering all the parameters necessary to produce the Master File Report, Click Next.

The next page contains distribution destinations. Upon load, if a customer was selected on the previous page, the customer contacts load with printer, fax and email contact information.

1. Select the publishing destinations in the left-hand window on the lower left of the distribution form. Either double click the item to move it to the right or click the right arrow [>]. If all destinations are required click the double right arrow button [>>] to move all destinations. If any items are moved in error select the item and either double click or click the left arrow [<] to move the arrow back to the left-hand frame or the double arrow [<<] to move them all.
2. There are times when some destinations are not on the customer record the top section of the form is designed to allow the addition of non-listed destination. Tab or click into the Override recipient's name field and enter the name of the override recipient.
3. Click the drop-down list to the right of the Override destination type and select the

type of destination. The choices are: Printer, Fax and Email.

4. Tab or click into the Override destination address (Fax/Email) and enter the Email address or Fax number.
5. Once all the override information is entered properly click the Add button
6. Repeat the above steps for all additional destinations.
7. Upon completion of all destinations and override destinations click Finish.
8. The system then pops up a notification that the message was properly queued and is running.

## Customer Status - Active/Inactive

This report satisfies one of the documentation and reporting requirements of UL 1981. Please see Appendix section UL Required Reports for more information.

The Customer Status report, lists the current active alarm status for a single customer or all customer accounts.

1. Select Maintenance > System Reports.
2. Select the Customer Activity Report by clicking it in the Report navigator on the left edge of the System Reports screen.
3. Tab or click into the Customer Status field and enter a detailed description for the report. It is important to be descriptive so that this report may be easily identifiable in the Report Queue.
4. On-demand reports default to a priority level of 5. However, if the report needs to be processed more quickly than other, less important reports, use the UP arrow to select 4, 3, 2, or 1, giving the report a "higher" priority.
5. Determine if the report should run on All Customers or a Single customer.
6. For the Single customer selection tab or click into the Contract ID field and enter the Contract ID or click the Search button and locate the customer.
7. Upon entering all the parameters necessary to produce the Customer Status Report, Click Next.
8. The next page contains distribution destinations. Upon load, if a customer was selected on the previous page, the customer contacts load with printer, fax and email contact information.
9. Select the publishing destinations in the left-hand window on the lower left of the distribution form. Either double click the item to move it to the right or click the right

arrow [>]. If all destinations are required click the double right arrow button [>>] to move all destinations. If any items are moved in error select the item and either double click or click the left arrow [<] to move the arrow back to the left-hand frame or the double arrow [<<] to move them all.

10. There are times when some destinations are not on the customer record the top section of the form is designed to allow the addition of non-listed destination. Tab or click into the Override recipient's name field and enter the name of the override recipient.
11. Click the drop-down list to the right of the Override destination type and select the type of destination. The choices are: Printer, Fax and Email.
12. Tab or click into the Override destination address (Fax/Email) and enter the Email address or Fax number.
13. Once all the override information is entered properly click the Add button
14. Repeat the above steps for all additional destinations.
15. Upon completion of all destinations and override destinations click Finish.
16. The system then pops up a notification that the message was properly queued and is running.

## Receiver Line Loading - Accounts on Each Receiver ID

This report satisfies one of the documentation and reporting requirements of UL 1981. Please see Appendix section UL Required Reports for more information. This report lists Receiver Lines, showing customer allocation to each. It is important to know which Receivers are processing signals and alarms from which customers, and the load on each receiver, in order to troubleshoot the system if/when necessary.

It is important to note that the difference between the **Total Limit** and **Total Avail** columns are the number of lines currently Inactive.

**Example:** In the below *Receiver Line Loading Report - for Prefix 99*, there are a **Total Limit** of 20 and a **Total Avail**(able) of 16. Therefore, there are a total of 4 considered **Inactive** at this time.

03/21/2012-10:15 → ID: BOLD

### Receiver Line Loading Report

Prefix	Description	Active Limit	Total Limit	Active Cnt	Total Cnt	Active Avail	Total Avail
99	Default Prefix	10	20	0	4	10	16
SUR	Surgard	0	0	0	0	0	9999
<b>Totals</b>				<b>0</b>	<b>4</b>	<b>10</b>	<b>10015</b>

To run a Receiver Line Loading report:

1. Select Maintenance>>System Reports.
2. Select the Receiver Line Loading (Rec Line Loading) Report by clicking it in the Report navigator on the left edge of the System Reports screen.
3. Tab or click into the Report Description field and enter a detailed description for the report. It is important to be descriptive so that this report may be easily identifiable in the Report Queue.
4. On-demand reports default to a priority level of 5. However, if the report needs to be processed more quickly than other, less important reports, use the UP arrow to select 4, 3, 2, or 1, giving the report a "higher" priority.
5. Select the necessary details within one or more applicable fields, as described below. (It is possible to enter information in a single field or in many fields depending on how specific the resulting report information should be.)
6. Check the checkboxes corresponding with the Receiver Lines to be displayed on the report.
7. Click Next.
8. The next page contains distribution destinations. Upon load, if a customer was selected on the previous page, the customer contacts load with printer, fax and email contact information.
9. Select the publishing destinations in the left-hand window on the lower left of the distribution form. Either double click the item to move it to the right or click the right arrow [>]. If all destinations are required click the double right arrow button [>>] to move all destinations. If any items are moved in error select the item and either

double click or click the left arrow [<] to move the arrow back to the left-hand frame or the double arrow [<<] to move them all.

10. There are times when some destinations are not on the customer record the top section of the form is designed to allow the addition of non-listed destination. Tab or click into the Override recipient's name field and enter the name of the override recipient.
11. Click the drop-down list to the right of the Override destination type and select the type of destination. The choices are: Printer, Fax and Email.
12. Tab or click into the Override destination address (Fax/Email) and enter the Email address or Fax number.
13. Once all the override information is entered properly click the Add button
14. Repeat the above steps for all additional destinations.
15. Upon completion of all destinations and override destinations click Finish.
16. The system then pops up a notification that the message was properly queued and is running.

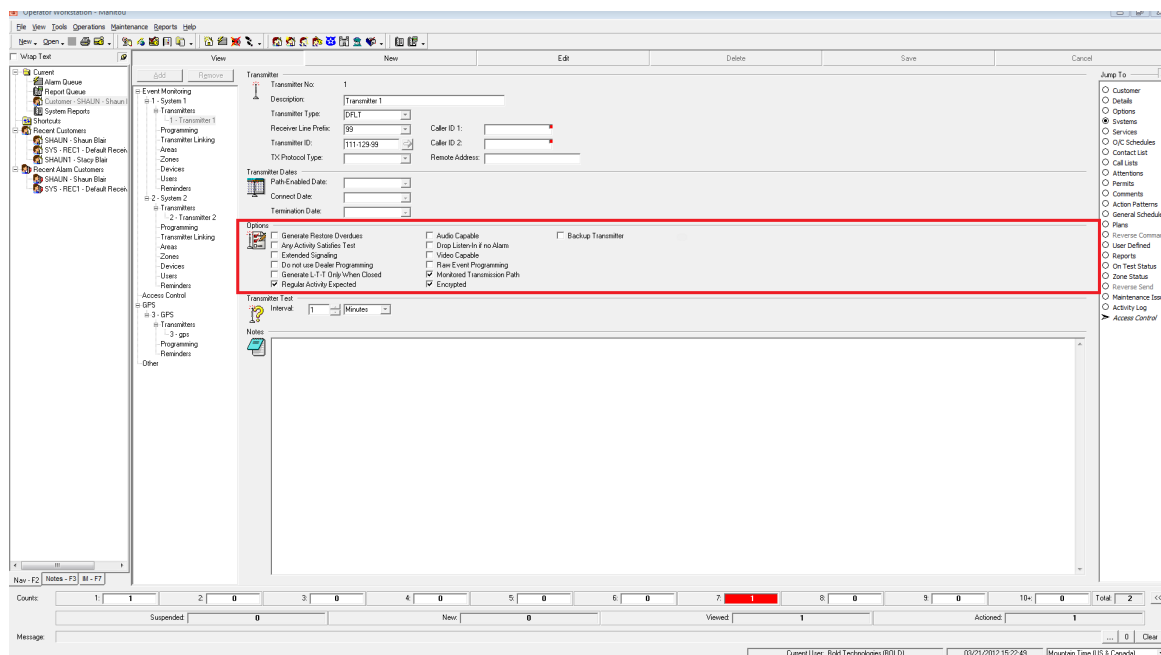
## UL Transmitter

UL requires that certain transmitter monitoring options be enabled.

- **Regular Activity Expected** - determines whether or not an account is active; when checked, this indicates that a transmitter receives a minimum of one signal per day.
- **Monitored Transmission Path** - monitors signal path, when checked, provides standard line supervision.
- **Encryption** - additional line security feature, encrypted or standard, when checked along with Monitored Transmission Path, provides complete data entry and line supervision.

To enable UL required transmitter monitoring options:

1. With an account open, select **Services** from the *Jump To* menu on the right-hand side of the screen.
2. Select the specific transmitter under the *Transmitters* heading from the file tree displayed on the left of the *Account Information* window.
3. Under the *Options* section of the *Transmitter* window, click the appropriate checkboxes to enable the UL required monitoring options for that particular transmitter.



UL Transmitter Options

4. Repeat for any additional transmitter(s) requiring monitoring for the account.

These transmitter monitoring options are also supported within the [Alarm Detail Report](#) which displays information about a particular alarm including whether the Transmitter associated with the alarm is designated for **Monitored Transmission Path** and **Encrypted**.


## UL Compatible Receiver List

Specific receivers have been identified as compatible by UL. The following table includes all models of receivers we are compatible with in accordance with UL Compatibility.

Manufacturer	Model	UL Listed Manitou
Sur-Gard	System III	Y
Sur-Gard	System IV	Y
Radionics	D6600	Y
AlarmNet	7810ir	Only if behind an Ademco 685
Ademco	685	Y



FBI	CP-220	Y
ITI	CS-4000	Y
Sur-Gard	MLR2	Y
Sur-Gard	MLR2E	Y
DMP	SCS-1R	Y
Teldat	VisorAlarm	Y
Napco	Net Link	Y
Osborn Hoffman	2000	Y
AES	7705i	Y
Bosch	D6100	Y


 We are currently working with UL to resolve any outstanding receiver issues and because we have an open project with UL, the local field inspectors will not hold our customers accountable during their yearly inspection. If a customer reports a variance during their inspection, please put a ticket into product control so we can work with UL to resolve the issue and certify the receiver.

## Troubleshooting


The Bold Knowledgebase is available to make troubleshooting easy and quick. Accessing the Knowledgebase Troubleshooter to determine how to resolve issues and/or problems, provides up-to-date information and resolutions.

## Accessing the Knowledgebase and Troubleshooter

1. Log on to <https://support.boldgroup.com>.
2. Enter the Username and Password provided to upon sign up with Bold

 *If login information has not been provided, contact Bold to get a Username and Password issued.*

3. Click on the Troubleshooter link, or may view articles in the Knowledgebase by clicking that link

 *If a particular issue has not been documented in the Knowledgebase, open a ticket to get the issue reviewed by a member of the Bold staff.*

## Appendices

Appendices have been utilized within this manual to provide additional pieces of information and instruction for use with the Manitou CS 2.0.0 system.

- [Appendix A - Add-On Modules](#)
- [Appendix B - Retransmission](#)
- [Appendix C - Manitou Service Descriptions](#)
- [Appendix D - Entry/Exit Programming](#)
- [Appendix E - Delaying Signals](#)
- [Appendix F - System Configurations](#)
- [Appendix G - Manitou Remote Access](#)
- [Appendix H - Manitou Language Utility](#)
- [Appendix I - Audit Trail](#)

## Appendix A - Add-On Modules

Bold Technologies offers additional modules to improve efficiency and allow for more control within the Manitou monitoring system.

### MediaGateway

MediaGateway is a compilation of independent products working together to provide unique solutions to the business problems of central stations. These products are grouped into two modules, which can be provided individually as either the Bold Efficiency Collection or the Personal Safety Collection, or combined into the Bold Efficiency and Personal Safety Collections.

- **Bold Efficiency Collection** provides an increased level of efficiency through the use of such tools as customized voice responses, automatic text notifications, receiver line tests, auto-respond features, social media monitoring, even a real-time graphical display

(dashboard), and much more.

- **Personal Safety Collection** enables talk and listen capabilities by way of two-way voice functionality as well as the ability to use any phone as an alarm system, routing a voice call to a central station operator as an alarm. The Personal Safety Collection also provides additional safety and protection for the lone worker as well as GPS information from mobile devices.

## Location & Address Services

### Address Verification

Address validation verifies the physical address of a record (whether Customer, Dealer, Branch, or Contacts associated with the record) through a 3rd party vendor, backed by the USPS. In addition to updating individual records, Address Services allows for bulk address updates as well. This function enables a large group of addresses to be compared against the USPS national database for validity.

By designating simple search criteria, a single address or a bulk group of addresses (up to 500 records at one time) can be compared against a national database for accuracy and verification. Then, with a few quick clicks, you can edit, update, and save addresses back in the system. Users can even choose to include updates to PSAP (public safety answering point information) facilities, include contact addresses or show only those Addresses that have already been updated and verified.

When added to a Manitou system, you can access Address Services module through any record by first populating the address (either through input or Customer/Dealer/Branch lookup) and clicking **House**.

### Location Services

Location Services, using a nationally recognized mobile emergency service, provides a seamless way to determine the location of both smartphones (such as an iPhone) that can deliver GPS location information as well as traditional mobile phones, which can only initiate a voice call. By integrating the Location Services module with the Manitou system, you can quickly determine the location of a caller and relay that information to the associated Authorities.

- **Device Location Determination** - Receipt of mobile emergency voice call, with or without GPS location data from the device, received as an InstantConnect call through MediaGateway, then parsed and submitted for handling through the Signal Handling. The Signal Handler will initiate GPS location lookup and determine appropriate Authorities to call, and will include the associated alarm number as well as any other identifying information.

- **PSAP Integration** - Provides detailed Authority information through integration with the Pitney Bowes or West [Intrado] PSAP (public safety answering point information) service. Immediate PSAP lookup for a specific Authority Type (police, fire, medical), notifies alarm handlers if information is available.
- **Bing Mapping Integration** - Integrate Bing mapping service data into the Manitou software.
- **Simple Address Verification** - Through the Location Server, you can perform a simple check for address verification by clicking **Verify**. If verification is successful but returns an updated address, the Manitou system will prompt you to change or discard the address. If Address Services has been added to the account, once you select **Verify**, this module will take over.


## BoldNet

BoldNet enables you to quickly access and edit Customer accounts, as well as customize the BoldNet web page. BoldNet includes the following features:

- **Filtering**  
Many of the BoldNet item lists are now filterable based on criteria you specify.
- **Help File Customization**  
Central stations can now add their own help sections to BoldNet as needed.
- **Logon Messages**  
Central stations can create a logon message that users will see when they logon to BoldNet (e.g., maintenance items, updates, etc.)
- **Paging**  
Most lists containing over twenty (20) items are now 'paged' - lists will automatically be split into pages of twenty (20).
- **Permissions**  
Set, Manage and Enable/Disable permissions
- **Sorting**  
Many of the BoldNet lists are now sortable via column selection.
- **Templates**  
Significantly reduce data entry time by using pre-populated BoldNet templates.
- **BoldNet PDA**  
Accessibility to BoldNet through SmartPhones/PDA devices
- **User Dashboard**

- **Editing Capabilities**

- **Account Management**



# Dealer

## D0011 - Security Experts

### My Dashboard

Your dashboard contains useful quick-access tools and summary information

### My Information

View your general contact information

### My Contact List

View the list of people that the central station may contact

### My Advanced Information

View additional, less used information about your account

### Find Someone

Use the search tool to find a subdealer or customer

### New Customer

Create a new customer

### Run a Report

Run one of the built-in reports

### My Settings

Edit branding and user settings

### Customer Quick Search

Quick search will locate customers by name or ID

### My Recent Customers

R0008556	Charles Haynes
B0000330	Great Bicycle Supply
B0000157	Road Way Sales And Rental

### Customer Watch List

There are no customers in the watch list. To add one, choose 'add this customer to the watch list' from the customer dashboard.

### Statistics

☒ Include Sub Dealer Statistics

#### Customer Counts

Active Customers	145
Inactive Customers	7
Pending Customers	6
Deactive Customers	5


#### Customer Status Summary

Customers Currently In Alarm	1
Customers Currently On Test	0
Dispatched Alarms In The Last 24 Hours	0
Customers With New Maintenance Issues	2
Customers With Unresolved Maintenance Issues	0
Customers With Expired Permits	0
Customer Watch List	0
Top Alarm Activity Over 30 Days	0
Top False Alarm Activity Over 30 Days	0

#### Customer Transmitter Summary

Transmitters In Alarm	0
Transmitters In Fault	0
Transmitters In Line Fault	0
Transmitters With Low Battery	0
Transmitters With Late-To-Test	1
Transmitters Missing Event Programming	1
Transmitters Not On File In The Last 24 Hours	0

#### Customers



Active	Inactive
Pending	Deactive

# BoldTrak

BoldTrak is a device tracking application that integrates into the Manitou software. It offers a robust set of features that can be used to track and monitor anything from people to vehicles and pinpoint virtually any location on its built-in map.



Main Login screen

With BoldTrak, it is easy to manage user and device locations, configure device settings, geographical sites, as well as create geographical boundaries through the use of Geo-Fences. BoldTrak also allows for text messaging on any enabled device and can provide directions, whether from device-to-device or from one location to another, independent of any devices.

## Stealth Logger and WatchDog

Supplying an additional level of data and system protection, Stealth and WatchDog work with Manitou to provide and log important messages pertaining to business functions.

### Stealth Logger and Viewer

Stealth Logger and Viewer provide an easy way to take your central station paperless, saving money and the environment. Stealth Logger replaces your impact printers that capture receiver output and consume paper at an overwhelming rate. Stealth Logger also lets you monitor signal traffic, receiver and line usage in a convenient graphical display. Plus, Stealth Logger data is stored separately from the Manitou database, providing another protection against data loss.

### WatchDog

WatchDog monitors all of the system functions and resources and receives reports of any warnings, errors, or failures. These reports can then be configured to scroll across the bottom of the Manitou screen and/or sent to a specified contact list.

## Access Point


The Access Point module provides integration access to receive and acknowledge access control-related signals such as forced door, invalid card, access denied, etc. These signals can then be read and submitted as alarms into the Manitou system.

## VSI-Fax

VSI-Fax is a 'virtual fax machine' that looks for information to put in to an outbound fax. When added to the Manitou system, VSI-Fax checks the autosend folder for specific information at regular time intervals.

## Appendix B - Retransmission

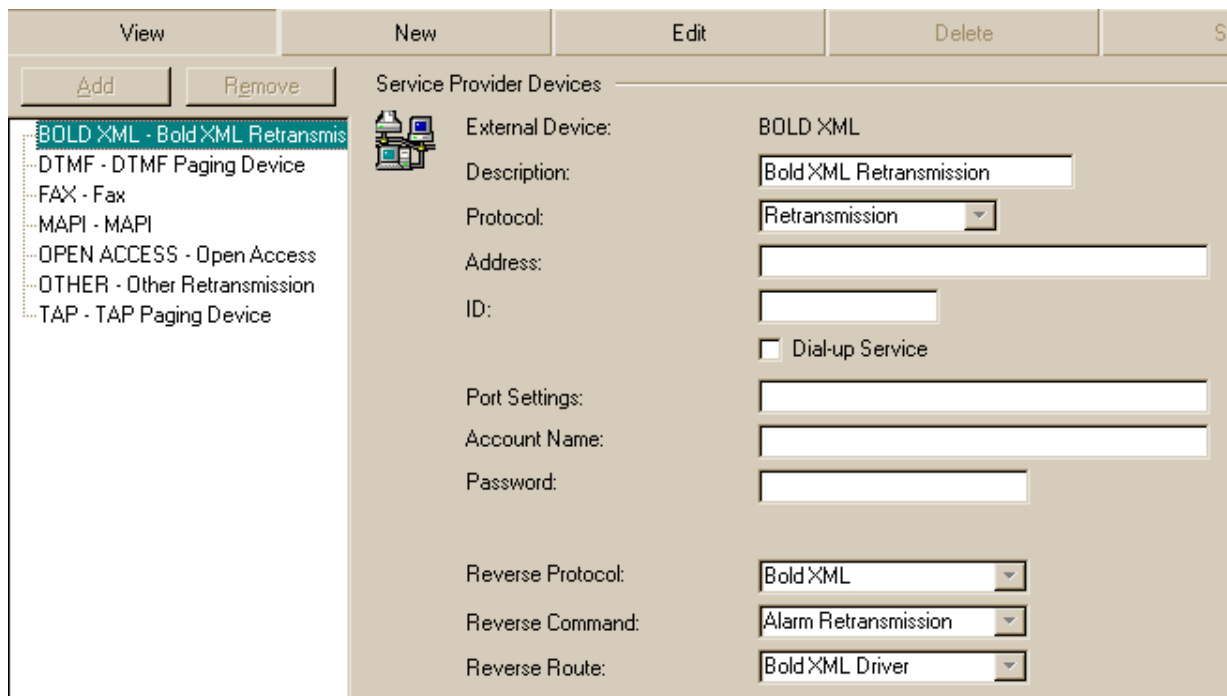
It is possible to retransmit, or "forward", an alarm from one location to another. A good example of this would be retransmitting a fire alarm that is received at an alarm company directly to the Fire Authority for action.

 *For more information on retransmission, please see the facility Supervisor or Manager.*

Retransmission forwards Action Pattern alarm information to a receiver (or device) via the FEP. Retransmission is similar to reverse commands, except that the data can be sent to a different receiver or device (as opposed to the initiating one). In the following examples, the illustrated Bold XML receiver driver is used because it does not enforce validation for reverse commands.

## Service Provider Devices

The *Service Provider Devices* link a contact point to the reverse command for retransmission. This is done in the Supervisor Workstation under the *Maintenance menu > Setup > Service Provide Devices*. The following form will then appear:



View New Edit Delete S

Add Remove

Service Provider Devices

BOLD XML - Bold XML Retransmission  
DTMF - DTMF Paging Device  
FAX - Fax  
MAPI - MAPI  
OPEN ACCESS - Open Access  
OTHER - Other Retransmission  
TAP - TAP Paging Device

External Device: BOLD XML

Description: Bold XML Retransmission

Protocol: Retransmission

Address:

ID:

☐ Dial-up Service

Port Settings:

Account Name:

Password:

Reverse Protocol: Bold XML

Reverse Command: Alarm Retransmission

Reverse Route: Bold XML Driver

➤ Input all needed values. The following values are required:

- **Protocol** - This must be set to 'R' (Retransmission).
- **Reverse Protocol** - This defines the type of reverse command requested.
- **Reverse Command** - This is the type of reverse command that will be transmitted.
- **Reverse Route** - This specifies which FEP driver to use.

## Output Device Types

Output device type configuration links contact points with a service and/or device, via retransmission. You can also use this configuration to connect a default script message to a specific contact point. To configure output device types, open SWS and go to the **Maintenance** menu > **Setup** > **Output Device Types**. The following form will appear:



Output Device Types

- Input all needed values. The following values will need to be set with "R" (retransmission):

- **Attribute**
- **Type**
- **Protocol**

The **Service Code Required** checkbox should be selected so that the contact point will be linked to a service/device.

## Reverse Commands

Reverse Commands are used to send signals back to the customer's panel in order to test to see if the panel is working properly. Reverse Commands also allow the Operator to interact with hardware in the field, such as requesting a picture from a surveillance camera or telling a door with [Access Control](#).

The screenshot shows the 'Reverse Channel Command' form. On the left, there are 'Add' and 'Remove' buttons above a list with 'Available' and 'Active' items. The main form area is divided into several sections:

- Reverse Channel Command:** Contains dropdown menus for Type, Group, and User Group, and text input fields for Command, Description, and Command Detail. To the right are dropdowns for Response Type, Response Delay, and Command Level.
- Availability:** A list of checkboxes including Alarm Only, Dealer User Allowed, Customer User Allowed, Restricted, VRT User Allowed, Web User Allowed, and Disabled.
- Attributes:** A list of checkboxes including Connect Command, Disconnect Command, Retransmission, and Transmitter Connection Req...
- Optional Parameters:** A section with a 'Details' table.

Details							
Field	Data	Label	Range	DB	Default	Format	

Reverse Channel Command form

The reverse command specifies the data to send, as well as, the protocol, or format, the data is in so that the receiver will understand it. To set up a reverse command, go to OWS and select **Maintenance > Monitoring Company > Reverse Commands**.

**Reverse Channel Command**

Type:  Response Type:

Group:  Response Delay:

Command:  Command Level:

Description:  Command Detail:

User Group:

**Availability**

☒ Alarm Only

☐ Dealer User Allowed

☐ Customer User Allowed

☐ Restricted

☐ VRT User Allowed

☐ Web User Allowed

☐ Disabled

**Attributes**

☐ Connect Command

☐ Disconnect Command

☐ Request Binary Data

☒ Retransmission

☐ Transmitter Connection Required

**Optional Parameters**

Field Type	Data Type	Label	Range	DB Value	Default	Format
Database	Text			Service Provider		
Database	Text			Service Provider ID		
Database	Text			Contact's Name		
Database	Text			Contact Point		
Database	Text			Alarm Unique Id		
Database	Text			Monitoring Company		
Database	Text			Workstation ID		
Database	Text			CS/User Call-back		
Database	Text			Event Time		

Reverse Channel Command form

## Reverse Channel Command fields

- **Type:** This is the protocol type. Bold XML, in this case.
- **Group:** Retransmission commands do not specify a group.
- **Command:** This is any command mnemonic understood by the receiver to identify the request. ALM for this example.
- **Description:** A meaningful description of the command
- **User Group:** Defines what class of user (and above) have access to the command
- **Response Type:** Currently, all FEP reverse commands are asynchronous (delayed)
- **Response Delay:** Defines the number of seconds the FEP should wait for a response to the command from the receiver until it considers it timed out.
- **Command Level:** Must set to Customer.
- **Command Detail:** Determines how specific the reverse channel route needs to be to send the command
- **Availability:** Retransmission is for alarms only, so Alarm Only must be checked.
- **Attributes:** Retransmission must be checked.
- **Optional Parameters:** Many optional parameters may be included. The Contact Point and Script Message database parameters are illustrated since they can only be used in conjunction with a retransmission command.

- **Contact Point:** this is the contact point associated with the retransmission (may point to a pager, email address, etc)
- **Script Message:** this is the script message attached to the contact point, or the default script message attached to the output device type.

## Reverse Channel

The *Reverse Channel* function allows an Operator to send certain commands to alarm panels and other equipment located at the customer site. This function is commonly used to remotely reset an alarm panel. Reverse Channel commands can also be issued to test or make changes to transmission equipment at the customer site.

Reverse Channel

Type: AdPro Fast Scan

Reverse Commands Available

Connect to Receiver  
Connect to Site

Route: AdPro Fast Scan ☐ Override

Send

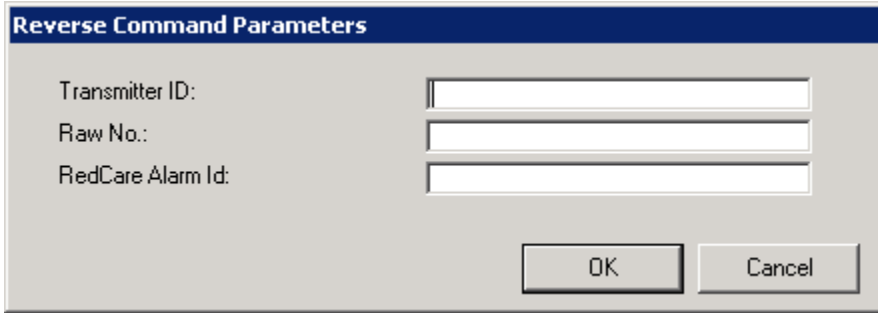
Command Summary

Clear

Command	Status	Description

Reverse Channel Command form

1. Select a **Reverse Channel Type** from the drop-down menu. This is the Transmitter **Type** that the signal will be sent to.
2. Once a **Type** is selected, *Reverse Commands* that are available will appear below.
3. Highlight which command to send, and click the **Send** button. A *Reverse Command Parameters* box will appear.



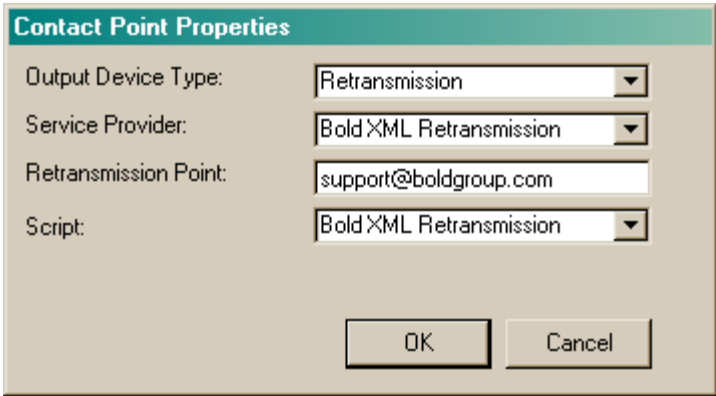
The dialog box titled "Reverse Command Parameters" has a blue header bar. It contains three input fields: "Transmitter ID:", "Raw No.:", and "RedCare Alarm Id:". Each field has a corresponding text box. At the bottom right, there are two buttons: "OK" and "Cancel".

Reverse Command Parameters

4. Based on the Transmitter type selected, various parameters will be available in the *Reverse Command Parameters* box.
5. Enter the **Transmitter ID** and any other parameters required by the Transmitter Type.
6. Click **OK**.
7. The command will now be sent to the Transmitter.
8. When the Transmitter receives the command sent from Manitou, a summary will appear in the *Command Summary* portion of the window.

## Contact Point

Retransmission contact points may be added directly for a customer, customer persons, etc. When adding the contact point, select the retransmission contact point type set up in the Supervisor Workstation. Retransmission contact points must be set up using the *Contact Point Properties* dialog.



The dialog box titled "Contact Point Properties" has a teal header bar. It contains four input fields: "Output Device Type:" with a dropdown menu showing "Retransmission"; "Service Provider:" with a dropdown menu showing "BoldXML Retransmission"; "Retransmission Point:" with a text box containing "support@boldgroup.com"; and "Script:" with a dropdown menu showing "BoldXML Retransmission". At the bottom, there are two buttons: "OK" and "Cancel".

The following values are required:

- **Output Device Type** - output device type set up in the Supervisor Workstation
- **Service Provider** - service provider device set up in the Supervisor Workstation
- **Retransmission Point** - pager number, email address, etc. This links to the Contact

Point reverse command database parameter.

The following value is optional:

- **Script** - script message to include in the transmission. This links to the Script Message reverse command database parameter.

## Sending Retransmission

During alarm handling, the retransmission may be incorporated into an Action Pattern by using the contact point as part of a contact action. Additionally, actioning the contact point in the *View All Contacts* tree will also send the retransmission.

# Appendix C - Manitou Service Descriptions

## Dates on Services

With the exception of the Standard Service all other services may have a start and end date. The Manitou application will enable and disable those services based on those dates.

## Standard

The Standard service (previously Alarms Only) is used to define an account in Manitou. If there is a customer account in Manitou it should have the Standard service. This simply makes sure that the programming is enabled for the record.

## User-Defined Services

This service can be added multiple times provided the description name is changed to something different each time. This is provided to the monitoring company to add services they offer that are not listed in Manitou's default services list.

## Open/Close

The Open/Close service turns on the Schedules and enables the monitoring or recording of openings and closings of the system. When this service is set to Monitor any exceptions will trigger alarm events requiring some sort of Operator intervention. When this service is set to Record no events, exception or not, will trigger alarms. Exception events can be reviewed through the activity log and reporting.

## Fire Test

The Fire Test service is for Fire systems that want to separate out the Test and standard service. This doesn't turn any other functions on or off within the application it just for reference purposes only. This service, like all others, can be flagged as chargeable.

### **Executive Protection**

This service is designed for personal protection services. This does not turn on any other functions within Manitou. Generally how Manitou would track executive protection would most often be through a schedule where the application would expect a “check-in” at certain times of day. If no “check-in” happened (Operators would send in a manual signal when they received the telephone call) the system would then generate a “late-to” signal and the Operator would then attempt to contact the protection agent and the protected person. If they were unable to contact them they would then dispatch to the last known location.

### **Lone Worker**

This service is designed for someone like a door-to-door sales person that works a route or region alone, or a person that works in a business alone. Like Executive Protection generally how Manitou would track lone worker would most often be through a schedule where the application would expect a “check-in” at certain times of day. If no “check-in” happened (Operators would send in a manual signal when they received the telephone call) the system would then generate a “late-to” signal and the Operator would then attempt to contact the worker. If they were unable to contact them they would then dispatch to the last known location.

### **Log Only (All Signals Logged)**

This service will override all other services on the account. This would most often be utilized when an account is either not yet ready to receive live signals or has reached its contract end date and has not yet renewed. This is used to override the existing services without having to remove the services.

### **Transmitter Test**

The Transmitter Test service enables the Transmitter Test interval on the Transmitter form within the customer record. The default test interval set when this service is selected is seven days. This service is most often utilized to ensure that the transmitter is indeed functioning every day, week, or month. If the system doesn’t receive its expected test or qualifying signal within the test period the system will then generate a Late to Test alarm.

### **Dual Signaling**

The Dual Signaling service is used when an account has two transmitters and one backs up the other. For example, a telephone line transmitter may be backed up by a radio transmitter. Obviously, the monitoring company doesn’t want to have to deal with two alarms each time so it is possible to link the two signals together through transmitter programming. If the telephone line alarm comes into the system it waits for the radio signal for a defined period of time and if the radio signal does not arrive the system gets an

additional alarm stating that the alarm was missing its dual signal. If the radio signal does arrive the one becomes a signal and the other becomes the alarm.

### **Two Trip Signaling**

The Two Trip service turns on the programming commands to enable the ability to wait for a second alarm before triggering an alarm. This would be used most often when a door contact may not be the most secure so the customer wants to wait for a secondary zone to trigger before generating an alarm. This requires some very specific programming and the signals themselves must have the ability to participate in two trip signaling. Please refer to the advanced programming commands for more information.

### **Entry/Exit Delay**

The Entry Exit Delay service is used when a person may take longer than the standard length of time and/or trigger multiple zones prior to reaching the key panel to disarm, or exit, the location.

### **Reports**

This service does not turn anything on or off within the Manitou application it is for tracking or display purposes only.

### **Audio Monitoring**

This service does not turn anything on or off within the Manitou application it is for tracking or display purposes only.

### **Video Monitoring**

This service does not turn anything on or off within the Manitou application it is for tracking or display purposes only.

### **UL Account**

This service enables the UL features for the customer record. UL is for United States and Canada and refers to specific response times required for certain alarms.

### **Verify Open/Close User**

This service is designed for the system to bring open and close signals to the Operator's attention so that the Open and Closing users are verified. It is important that there is an appropriate Action Pattern applied to these open and close signals so that the Police authorities are not contacted unless the verification is not successfully completed.

### **Guard Tour**

The Guard Tour service enables the advanced programming commands and is designed so that when a guard on a property does their tour of the property they trigger specific zones



in a specific order. If they do not trigger the zones in order or miss a zone, this will generate an exception at the monitoring company. This requires some very specific programming and the event codes themselves must be programmed for inclusion in a guard tour. Please refer to the advanced programming commands document for additional information.

### **Maintenance Services**

This service does not turn anything on or off within the Manitou application it is for tracking or display purposes only.

## **Appendix D - Entry/Exit Programming**

This command is used when signals are sent prior to an Opening signal, and after a Closing signal (and the panel does not itself handle Entry/Exit delays). The following rules apply to the Entry/Exit Delay process:

- Entry/Exit Delay service must be selected on the Services tab of the Customer record in order to utilize this command. Time out must be reasonable for the individual site and must be greater than zero.
- Open/Close service must also be selected for the Customer record. If a signal with this command is received while the area is closed and within an opening window, the signal does delay (doesn't drop into the alarm queue) waiting for the Opening signal. If the opening signal arrives within the prescribed period of time set on the Entry/Exit Delay service the alarm can be canceled and, if desired. If the Opening signal is received within the timeout period, the delayed signal is ignored. If a signal with this command is received within timeout seconds after a recent closing signal, the received signal is ignored, providing the status is new or new/suspended.
- The area upon which the signal is to be received must have an Open/Close schedule attached to it.

Entry delay processing will only work when it is within a scheduled Opening window. Exit ignore processing will always happen following a Closing (scheduled or not). It is possible to set up a schedule such that an Opening or Closing can happen at any time. However, it is important to realize that any signals flagged as being Entry/Exit signals will always be delayed for the entire Entry/Exit delay time always (since it could be followed by an Opening signal). We do not recommended that an 'Anytime Access' schedule be used for that reason. It should have some reasonable start and end boundaries to the window.

### **Entry Type**

The final piece is the entry of the right Entry/Exit Delay Type (EntryExit() command parameter) on the signals. With the current implementation, the following examples describe the required Delay Types needed:

## Type numbers

- 1 – Signifies the Start of Entry, but Intermediate for Exit.
- 2 – All other signals
- 3 – Any part of the Entry/Exit process
- 4 – Intermediate for Entry, but Final for Exit
- 5 – Start of Entry and Final for Exit

## Openings

The first is for systems that reports restore on the initial entry point (perimeter burg from the door being opened):

BA zone <x> signal: E/E Delay Type = 3 - this is the alarm signal when the door is opened

BR zone <x> signal: E/E Delay Type = 3 - this is the restore for the above signal <any other zones and restores that would be received as part of a normal

Open/Close cycle would be Type = 2>. The reason for the above types is because on the entry, the BA for the door is the first signal received.

## Closings

On the way out (Closing cycle), the BR for the restore of the door is the last signal received. With this programming, the Exit delay is not terminated upon any particular signal, it must expire. If the BA is set to Type = 1 and the BR is set to Type = 2, then the final BR restore on the way out will be in Customer Activity as a Signal and not Ignored (Activity will show Closing followed by the Restore).

BA zone <x> signal: E/E Delay Type = 1 - this is the alarm signal when the door is opened

BR zone <x> signal: E/E Delay Type = 4 - this is the restore for the above signal <any other zones and restores would be Type = 2>. This would then terminate the Exit cycle upon receiving the restore signal. Any further signal would be an alarm (unless it is in an Opening window which might start a new Entry cycle).

## Schedule Examples

Open/Close at anytime (not recommended)

The following schedule will cause the Entry delay process to happen at any time (can open at any time):

Mon 00:00 May Open/Close

Tue	00:00	May Open/Close
Wed	00:00	May Open/Close
Thu	00:00	May Open/Close
Fri	00:00	May Open/Close
Sat	00:00	May Open/Close
Sun	00:00	May Open/Close

#### Open/Close with no Late-to for Open or Close

The following schedule allows any access between 6am and 11pm (no Late-To for Open or Close):

Mon	06:00	May Open/Close
Mon	23:00	No Activity
Tue	06:00	May Open/Close
Tue	23:00	No Activity
Wed	06:00	May Open/Close
Wed	23:00	No Activity
Thu	06:00	May Open/Close
Thu	23:00	No Activity
Fri	06:00	May Open/Close
Fri	23:00	No Activity
Sat	06:00	May Open/Close
Sat	23:00	No Activity
Sun	06:00	May Open/Close
Sun	23:00	No Activity

The 'No Activity' action in the above schedule could be replaced by 'Must Close' which would then generate a Late-To-Close alarm to ensure that the system is armed by that per normal Open/Close scheduling. Opening and Closing signals will automatically be processed as if they were part of an Entry/Exit cycle - no Entry/Exit() command function should be designated, the Open or Closing signals do not need any special soft programming options

apart from the ones that signify that it is an Opening or Closing signal.

## Signal Processing Commands

### m – Entry/Exit

Signifies that this event can participate in Entry/Exit delays. The signals that will participate in this process must also contain the Signal Processing attribute of “m”

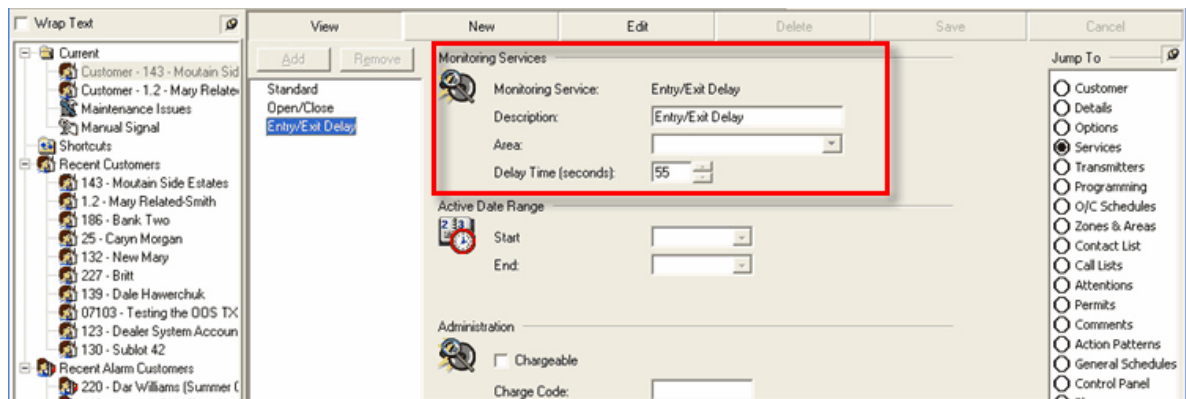
n – Delete alarm if it is canceled

If ‘c,’ ‘d,’ or ‘e’ is true then this option tells the signal handler to delete the alarm if it has been canceled when the alarm state is new or new/suspended. If the desired outcome is to remove this alarm from the alarm queue if the closing occurs within the prescribed time period then the n command is also required.

*These attributes are not set on any events by default to ensure that each company sets them based on their specific company practices and make a reasoned decision before using this feature.*

## Service Setting

Enter the delay time (in seconds) in the Delay Time field under the Service, as shown below:



## Programming

The specific signals to be delayed (the ones that normally get tripped as a part of entering the building in order to access the keypad/panel to disarm the system) must have the Entry/Exit() programming function attached to them. This includes any restore signals. TwoTrip() cannot be used in conjunction with any E/E signal - TwoTrip will cause E/E to be ignored. The Event Definitions for the signal types to be delayed must have the 'm' soft programming option enabled.

View		New		Edit		Delete		Save	
Transmitter Programming									
Show merged Transmitter Programming for Transmitter: <span>None</span> <span>Sort</span>									
TX	DES	Area	Zone	Event	Description	Area	Zone	Point Id	Commands
*	*A	*	*	BA	Burglary Alarm	*	*		EntryExit(3)
*	*A	*	B*	*O	Open	*	*		EntryExit(3)
*	*A	*	C*	*C	Close	*	*		EntryExit(3)

## Example: Burglary Alarm

View		New		Edit		Delete		Save		Cancel	
<div> <span>Add</span> <span>Remove</span> </div> <div> <div> <ul style="list-style-type: none"> <li>*X - Auxiliary</li> <li>*Y - System Restore</li> <li>*Z - System Alarm</li> <li>AA - Auto Arm</li> <li>AD - Auto Disarm</li> <li>AN - Analog Restoral</li> <li>AR - AC Restoral</li> <li>AS - Analog Service</li> <li>AT - AC Trouble</li> <li><b>BA - Burglary Alarm</b></li> <li>BA1 - Perimeter Burg</li> <li>BA2 - Interior Burg</li> <li>BA3 - 24 Hour Burg</li> <li>BA4 - Entry/Exit Burg</li> <li>BA5 - Day/Night Burg</li> <li>BA6 - Burg Outdoor</li> <li>BA7 - Burg Tamper</li> <li>BA8 - Burg Near Alarm</li> <li>BA9 - Intrusn Verifier</li> <li>BB - Burglary Bypass</li> <li>BC - Burglary Cancel</li> <li>BD - Swinger Trouble</li> <li>BE - Swinger TRBL Restore</li> <li>BH - Burg Alarm Restore</li> <li>BJ - Burg Trouble Restore</li> <li>BM - Burglary Alarm - Cro</li> <li>BR - Burglary Restoral</li> <li>BR1 - Perimeter Burg Restor</li> <li>BR2 - Interior Burg Restor</li> </ul> </div> <div> <div> <div> </div> <div> <div>Event Code:</div> <div>BA</div> </div> <div> <div>Description:</div> <div>Burglary Alarm</div> </div> <div> <div>Event Category:</div> <div>Burglary</div> </div> <div> <div>Redirect Code:</div> <div>Activation</div> </div> <div> <div>Priority:</div> <div>4</div> </div> <div> <div>Default Action Pattern:</div> <div>Burglary</div> </div> <div> <div>Generic Signal Instructions:</div> <div></div> </div> <div> <div>Signal Processing Attributes:</div> <div>bcdemn</div> </div> <div> <div>Customer Attributes:</div> <div>B</div> </div> <div> <div>Seconds before new alarm changes to:</div> <div>Warning Level: 90</div> <div>Danger Level: 180</div> </div> <div> <div>Seconds before deferred alarm changes to:</div> <div>Warning Level: 60</div> <div>Danger Level: 90</div> </div> <div> <div>Alarm Color</div> <div>Foreground</div> <div>Background</div> </div> </div> </div> </div>											

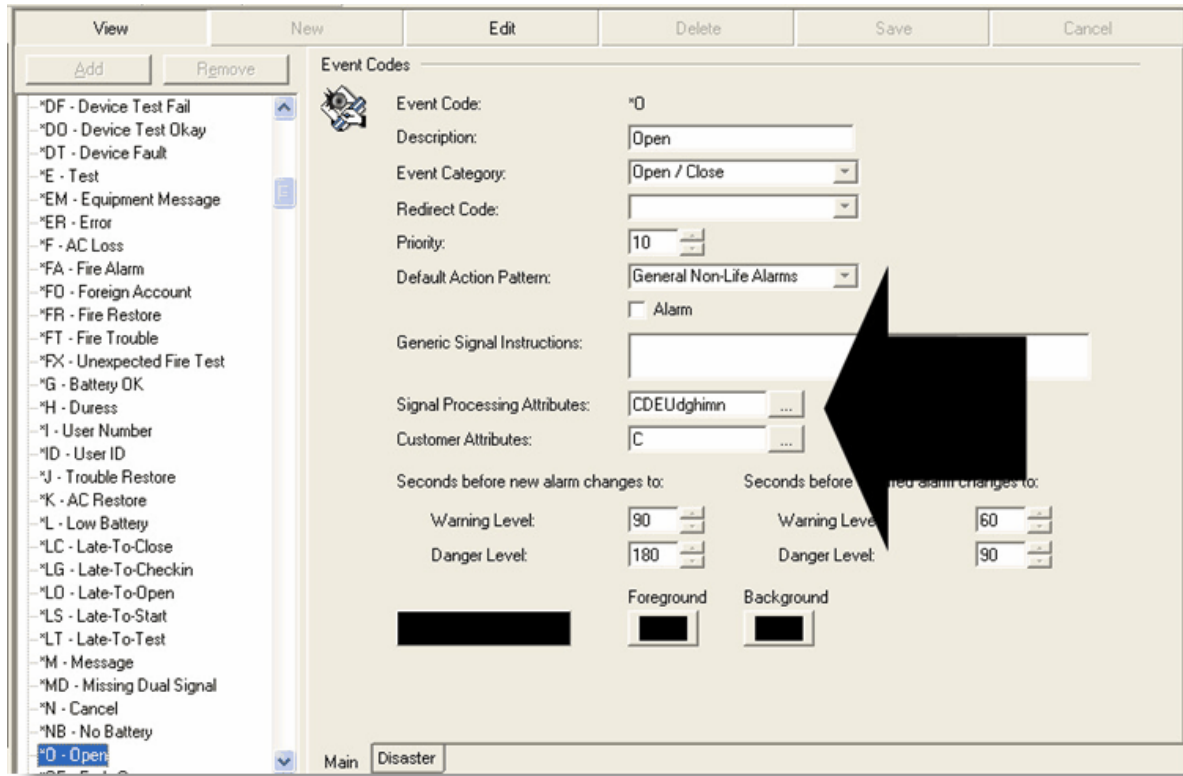
m – Entry/Exit

Signifies that this event can participate in Entry/Exit delays

n – Delete alarm if it is canceled

If 'c,' 'd,' or 'e' is true then this option tells the signal handler to delete the alarm if it has been canceled when the alarm state is new or new/suspended.

## Example: Open Signal



The screenshot displays the 'Event Codes' configuration window. On the left, a list of event codes is shown, with '\*O - Open' selected. The main area contains the following fields:

- Event Code: \*O
- Description: Open
- Event Category: Open / Close
- Redirect Code:
- Priority: 10
- Default Action Pattern: General Non-Life Alarms
- ☐ Alarm
- Generic Signal Instructions:
- Signal Processing Attributes: CDEUdghimn
- Customer Attributes: C
- Seconds before new alarm changes to:
  - Warning Level: 90
  - Danger Level: 180
- Seconds before red alarm changes to:
  - Warning Level: 60
  - Danger Level: 90
- Foreground: [Color Selection]
- Background: [Color Selection]

At the bottom, there are tabs for 'Main' and 'Disaster'.

m – Entry/Exit

Signifies that this event can participate in Entry/Exit delays

## Example: Close Signal

The screenshot shows the 'Event Codes' configuration window. On the left is a list of event codes, with '\*C - Close' selected. The main area contains the following fields:

- Event Code: \*C
- Description: Close
- Event Category: Open / Close
- Redirect Code: (empty)
- Priority: 10
- Default Action Pattern: (empty)
- ☐ Alarm
- Generic Signal Instructions: (empty)
- Signal Processing Attributes: FGHum
- Customer Attributes: C
- Seconds before new alarm changes to:
  - Warning Level: 90
  - Danger Level: 180
- Seconds before deferred alarm changes to:
  - Warning Level: 60
  - Danger Level: 90
- Foreground and Background color selection boxes (both black).

A large black arrow points from the 'Signal Processing Attributes' field to the 'Seconds before deferred alarm changes to' section.

m – Entry/Exit

Signifies that this event can participate in Entry/Exit delays.

## Example: Restore on Door Alarm

The example is for systems that do not report a restore on the door alarm. This is not recommended. The restore will ensure that the front door closed on the way out. The first example should also have RestRq() command on the door alarm with a timeout value in order to enable an Unrestored alarm event should the door not close all of the way and Restore() property on the restore event (should be automatic based upon the restore signal's event definition's signal processing attributes):

BA zone <x> signal: E/E Delay Type = 1 - this is the first and last signal <any other zones and restores would be Type = 2>

## Appendix E - Delaying Signals for Future Handling

The purpose of this Appendix is to provide information on how to delay signals such as AC failure or power outages so that the Operator is not overwhelmed with activity.

In a central station there are some scenarios where acting on an event immediately when it happens is neither desirable or in the best interests of the customer or the central station. Most often these signals are trouble signals coming from a sensor such as an AC or power failure. The purpose of this document is to show one method of delaying a signal or creating a secondary event that can be acted upon.

## Delaying Signals with Restore Overdue

### Methodology of a Restore Overdue

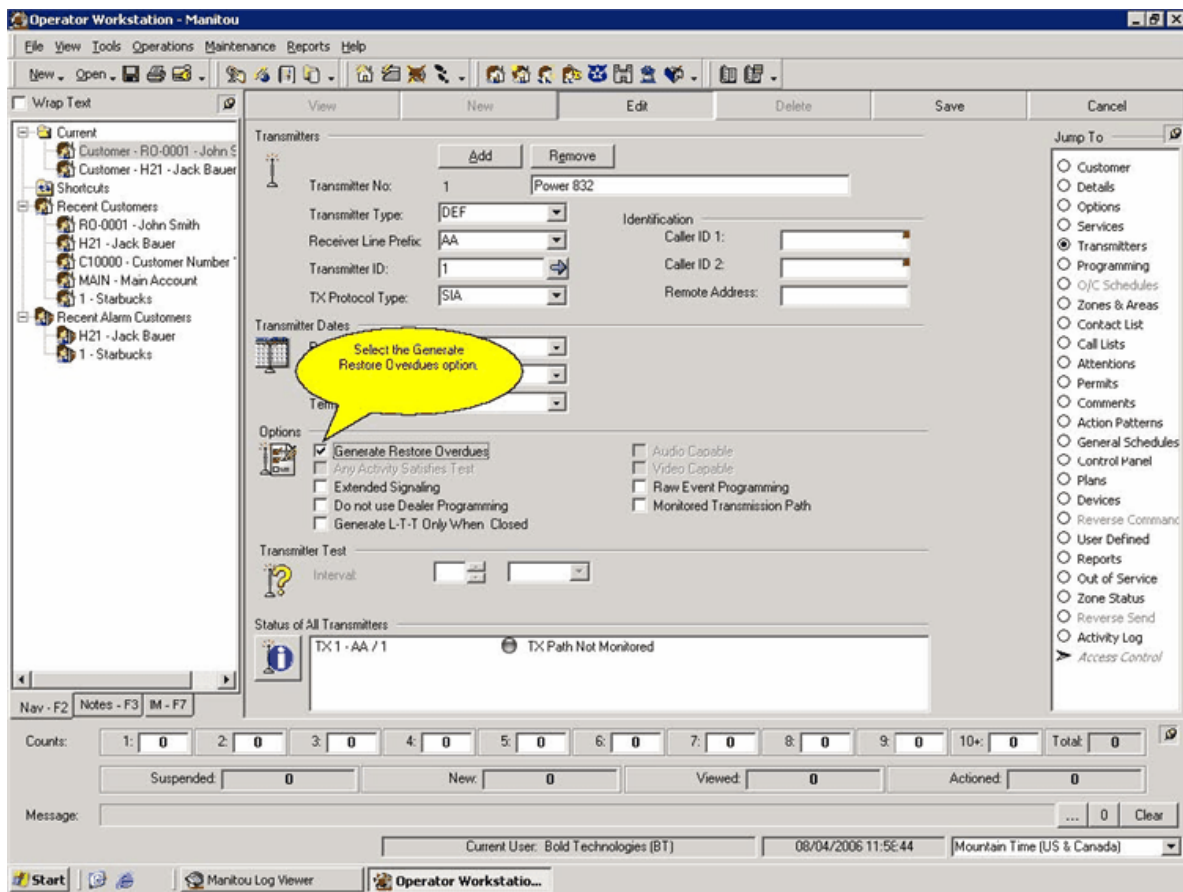
In the case of an AC failure or power loss, a central station can program the Manitou system to not treat the failure as an alarm but instead system handle the signal. A command can be created to require a corresponding restoral within a specific time period be received or an overdue signal will be generated. In this case the Operator does not handle the actual event, but instead acts upon a overdue signal that corresponds to the original power failure.

This option prevents the alarm queue from displaying any traffic other than the signal that is generated from restorals not being received.

## Setting the Overdue Option

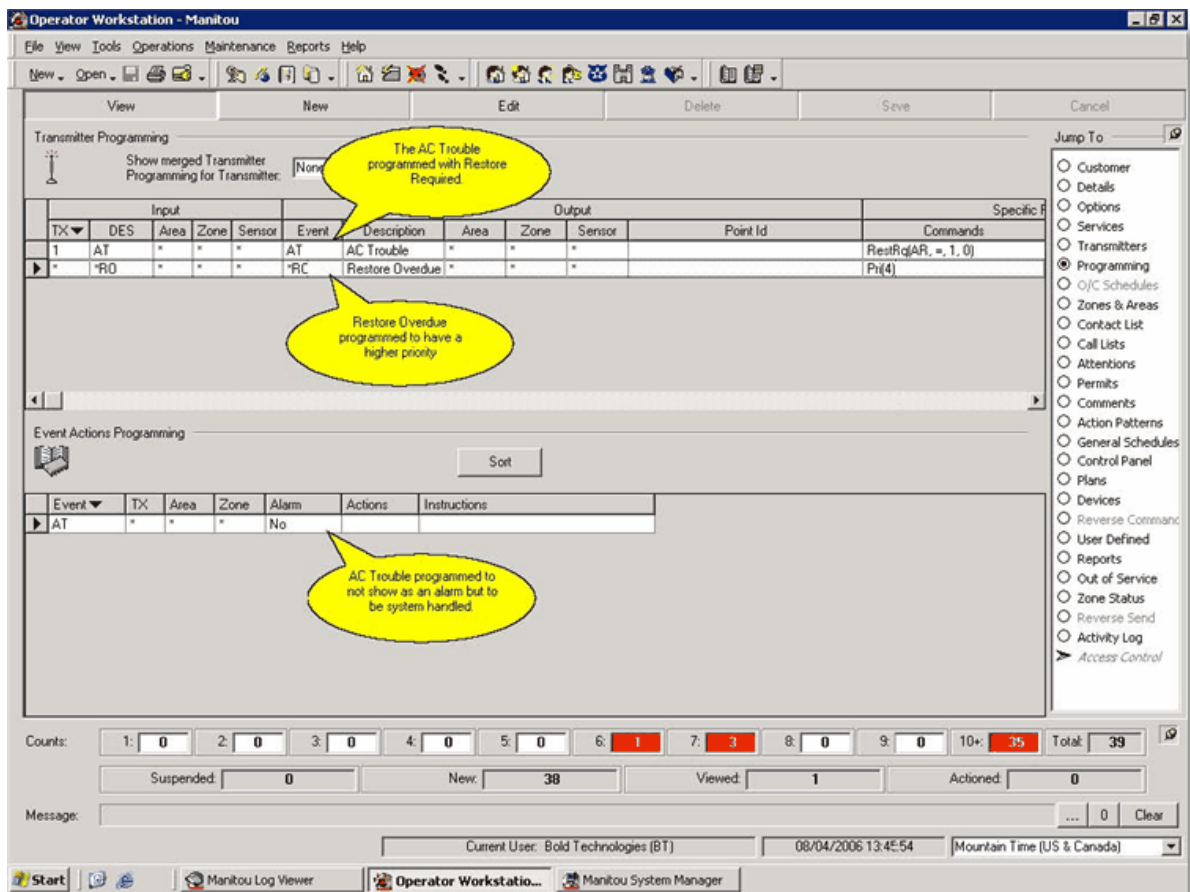
This option is needs to be set per customer. If this option is not set, an overdue will not be generated. To access the option, edit the customer and select the "Transmitters" option from the Jump To menu. You will need to select the "Generate Restore Overdues" option.





## Transmitter Programming for the Restore Overdue

The first step of programming for a Restore Overdue is to setup the transmitter programming. The following diagram shows the completed programming. The first line shows the programming for an AC trouble. After you have entered the basic programming it is necessary to add the RestRq command to the command programming.



## Command Programming for the Restore Overdue

Command Programming is where the magic begins to happen. The Restore Required command (RestRq) tells the Manitou system that this signal needs a restoral in a specific amount of time. The options are:

### Event

The event is the code that can restore the alarm. You can use the "\*" to have any signal restore the alarm, but in most cases you will want a specific event code that will act as the restoral signal. In our case this is AR for an AC Restoral.

### Zone

If you want to be specific, you can enter the zone for the signal that you want the restore signal should come from. Entering a "\*" will allow any zone. If you want the same zone that came in with the AC failure you can use the "=" to represent it.

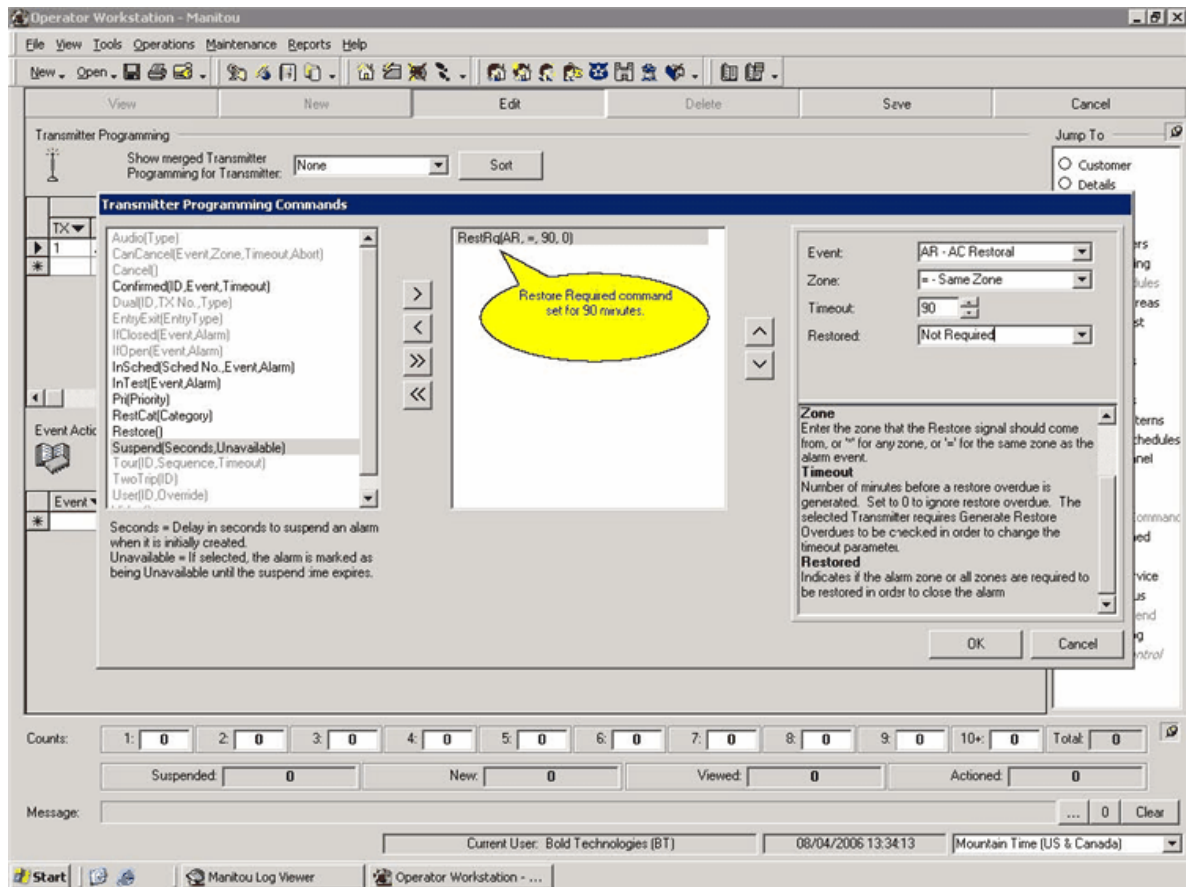
### Timeout

This is the number of minutes before a restore overdue is generated. If you want Operators

to handle the alarm an hour after the original signal came in, you would set this to 60. You need to have the Generate Overdue Restores option turned on for this to work.

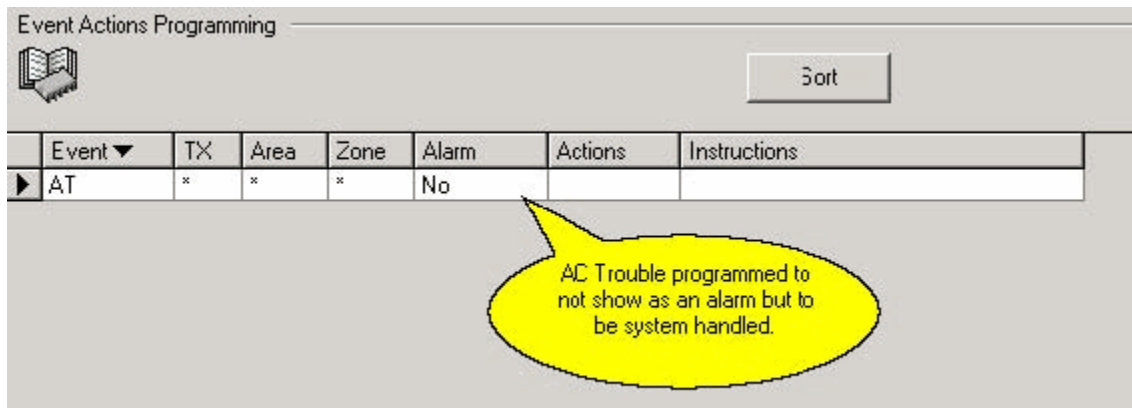
## Restored

Indicates if the alarm zone or all zones are required to be restore in order to close the alarm. In some cases you may want to turn this on so that the Operator cannot close the generated alarm until the restore has been received.



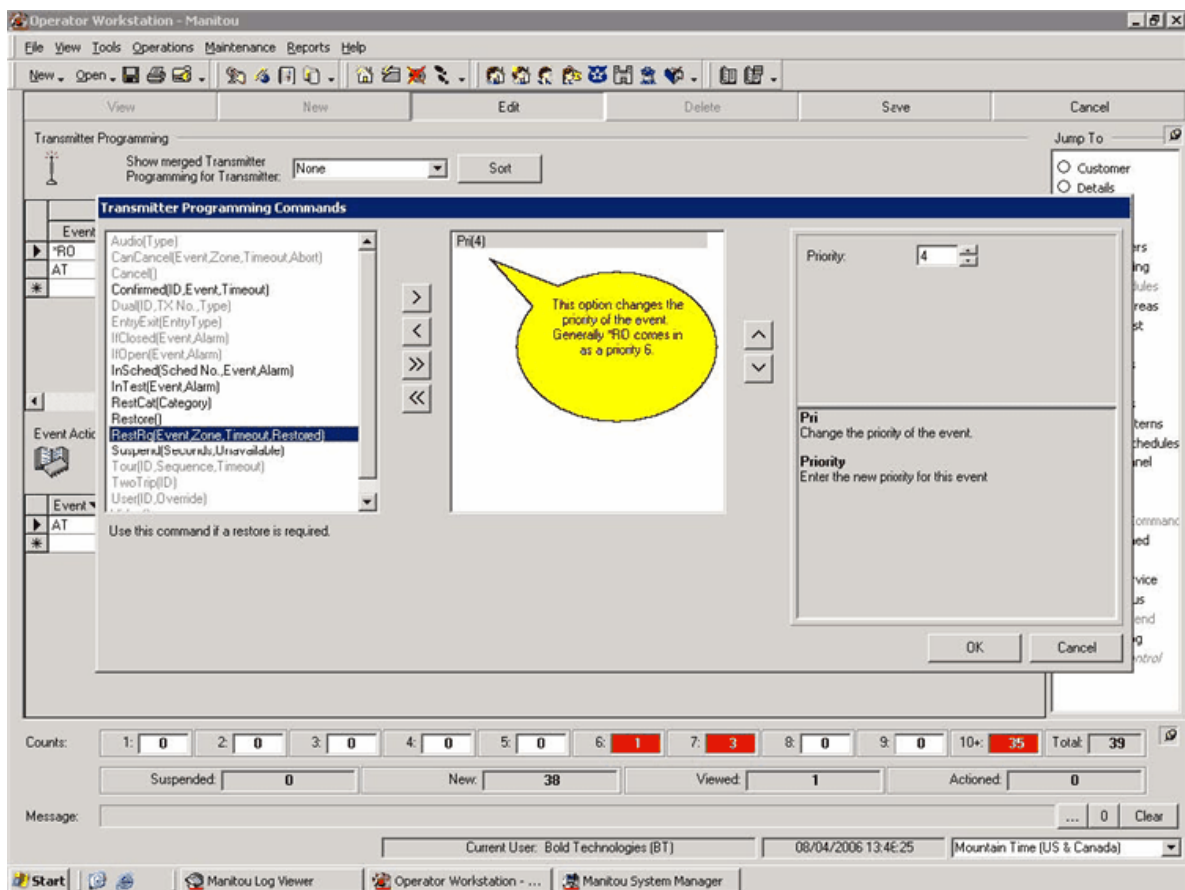
## Event Actions Programming for the Restore Overdue

Since we do not want to handle the actual AC Trouble, we have added a line of programming to the Event Actions to make the AC Trouble system handled. With this done, the basics of the restore overdue have been completed.



## Other Considerations for the Restore Overdue

Some central stations may find that the default priority of the Restore Overdue (\*RO) may be too low for the event generated. This can also be changed through the transmitter programming. By using the Pri() command it is possible to change the priority. The Pri() command has one option which is the new priority of the alarm.



## What the Operator Should See for the Restore Overdue

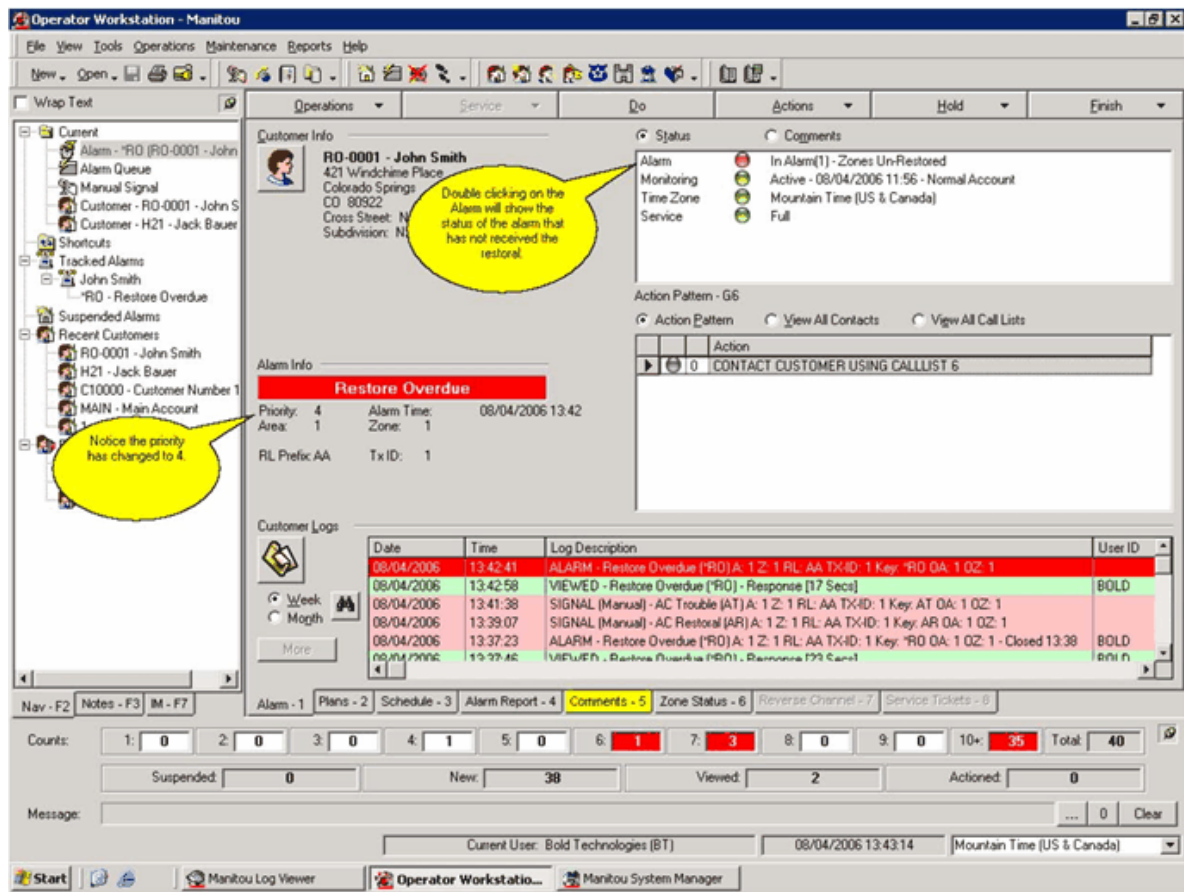
The following screen shots show what an Operator should expect with a Restore Overdue:

The screenshot displays the 'Operator Workstation - Manitou' application. The interface includes a menu bar (File, View, Tools, Operations, Maintenance, Reports, Help), a toolbar, and a sidebar with a tree view of 'Current' and 'Recent Customers'. The main window shows the 'Alarm Queue - Monitoring Group 1 (40 Alarms)' table. A yellow callout bubble points to the first row of the table, which is highlighted in red and labeled 'Here is the Restore Overdue at priority 4'.

Time	Pri	Customer ID	Customer	Code	Event	Area	Zone	User	Av
Aug 04, 13:42:41	4	RO-0001	John Smith	*RO	Restore Overdue	1	1		Available
Aug 01, 11:04:11	6	H20	Yanna Argmon in Manitou	*T	Trouble	1	1	YA	Available
Aug 01, 14:42:16	7		default	*SI	Receiver Comms Lost	1			Available
Aug 03, 14:26:15	7		default	*SI	Receiver Comms Lost (DUP)	1			Available
Aug 04, 09:07:28	17		default	*SI	Receiver Comms Lost (DUP)	1			Available
Jul 21, 16:00:01	10			*LC	Late-To-Close	1			Available
Jul 24, 08:00:02	10			*LO	Late-To-Open	1			Available
Jul 24, 16:00:01	10	2001	Zoo Zoo	*LC	Late-To-Close	1			Available
Jul 25, 08:00:02	10	2001	Zoo Zoo	*LO	Late-To-Open	1			Available
Jul 25, 16:00:02	10	2001	Zoo Zoo	*LC	Late-To-Close	1			Available
Jul 26, 08:00:02	10	2001	Zoo Zoo	*LO	Late-To-Open	1			Available
Jul 26, 16:00:02	10	2001	Zoo Zoo	*LC	Late-To-Close	1			Available
Jul 27, 08:00:01	10	2001	Zoo Zoo	*LO	Late-To-Open	1			Available
Jul 27, 16:00:01	10	2001	Zoo Zoo	*LC	Late-To-Close	1			Available
Jul 28, 08:00:03	10	2001	Zoo Zoo	*LO	Late-To-Open	1			Available
Jul 28, 16:00:00	10	2001	Zoo Zoo	*LC	Late-To-Close	1			Available
Jul 31, 08:00:02	10	2001	Zoo Zoo	*LO	Late-To-Open	1			Available
Jul 31, 16:00:01	10	2001	Zoo Zoo	*LC	Late-To-Close	1			Available
Aug 01, 08:00:02	10	2001	Zoo Zoo	*LO	Late-To-Open	1			Available
Aug 01, 16:00:01	10	2001	Zoo Zoo	*LC	Late-To-Close	1			Available
Aug 01, 17:00:00	10	H21	Jack Bauer	*LC	Late-To-Close	1			Available
Aug 01, 17:00:00	10	H25	President Lopez	*LC	Late-To-Close	1			Available

At the bottom of the window, the 'Counts' section shows: 1: 0, 2: 0, 3: 0, 4: 1, 5: 0, 6: 1, 7: 3, 8: 0, 9: 0, 10+: 35, Total: 40. The 'Suspended' count is 0, 'New' is 39, 'Viewed' is 1, and 'Actioned' is 0. The 'Message' field is empty. The status bar at the bottom indicates 'Current User: Bold Technologies (BT)', '08/04/2006 13:42:54', and 'Mountain Time (US & Canada)'.





## Programming at the Transmitter Level

Users can make this programming more global by adding the commands to the Event Programming on the Transmitter Types. Users still need add the option for Generate Restore Overdues to each account. Users will also need to add the transmitter type to each account that you want to have the programming.

## Appendix F - Manitou System Configuration

### Core Server Components

Manitou is not a single application. It is actually a collection of components working in concert to accomplish the complicated task of central station automation. These components can be Windows applications or Windows services. Collectively they create the Manitou System. There are eight core components of Manitou required by every Manitou System.

- **Database**

Manitou uses Sybase Adaptive Server Enterprise for data storage. Future versions of

Manitou will include support for Microsoft SQL Server.

- **Broker**

The Broker serves as the heart of Manitou. It controls communication between the other components, holds global information, manages alarms tracking and controls record locking.

- **Sentry**

The Sentry controls access to Manitou by validating a users basic access, priority and permissions. The IP address of the server running Sentry is the only published IP address to the system. Upon receiving an authentication request it returns an access token and the IP address of the Application server to the client software. This allows Sentry to load balance between multiple Application servers.

- **Application Server**

The Application Server works on behalf of the client to access the database, apply business rules and cache data.

- **Front End Processor (FEP)**

Each FEP communicates with multiple receivers. Signals are then translated from various incoming formats to a standard format used by Manitou. Each signal is also stored locally on the hard drive. This prevents lose of signals due to failure of other system components.

- **Marshaller**

The Marshaller controls the distribution of signals to the Signal Processor. It ensures that time dependant signals are sent in the correct order, and reports processing times to the Signal Handler.

- **Signal Handler**

The Signal Handler takes incoming signals from the Marshaller and manages proper insertion to the database.

- **Watchdog**

The Hardware Watchdog connects to Manitou to provide audio and visual alerts corresponding with Hardware failure, software failure or predefined system triggers. Hardware Watchdog alerts correspond with the Watchdog messages displayed in the status area of the Manitou Client and Supervisor Workstation. For example, failure of any system-critical component will trigger the hardware watchdog to beep and light one of the three component-related LEDs. Operators use the switch on the front of the hardware Watchdog to reset each time an alert sounds. The fourth LED monitors a constant heartbeat signal between the hardware and software Watchdog components. If that signal is not received on the expected interval, the hardware Watchdog will emit a beep and the fourth LED will light up.

## Optional Server Components

- **Publisher**  
Manitou's Publisher distributes all information external to the central station. This may include alphanumeric or numeric pages, faxes, email, or printed reports.
- **Voice Response Terminal (VRT)**
- **Supervisor Workstation**  
One or more Supervisor Workstations will be required to configure and manage the Manitou System. Supervisor Workstation allows administrator level access to system options. It also receives Watchdog reports and signal handling statistics.
- **Manitou Client**  
One Manitou Client will be required for each central station Operator as well as any data entry personnel. The Manitou Client provides for data entry and alarm processing.
- **System Scalability**  
One of the principal goals of Manitou is scalability of the system. Adding additional hardware enables it to expand from a small single user system to a system capable of handling a Super central station. Manitou components can be grouped differently to support systems of different sizes. This means that having to throw away hardware is a thing of the past. If you need more computing power you simply separate a task and put it on its own server.
- **Sample Configurations**  
The following examples will illustrate three different base systems. All base systems will include the eight Manitou core components as described in the first section above. Optional server components can be added to any base configuration.
- **Key**  
The following abbreviations will be used in all diagrams.

Abbr.	Description
DB	Database Server
AS	Application Server, Sentry, Broker
SH	Signal Handler, Marshaller
RS	Report Server
PU	Publisher
FEP	Front End Processor

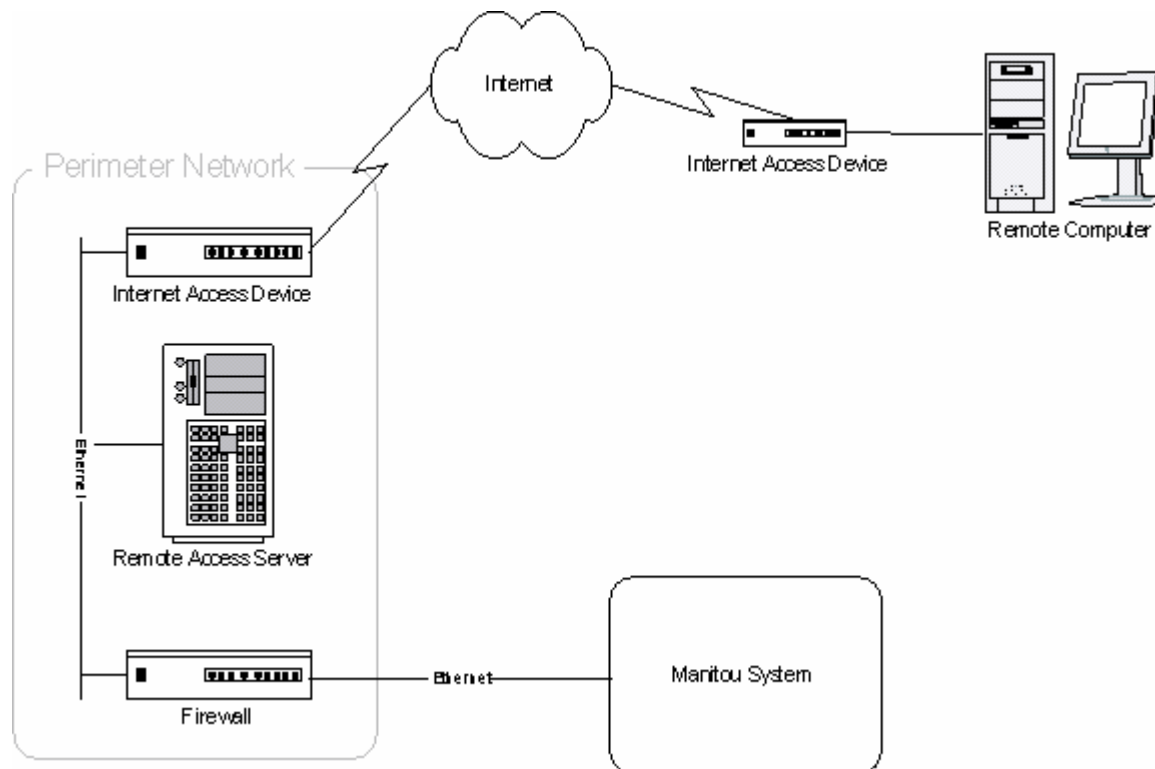


WD	Watchdog
VRT	Voice Response
RAS	Web Server, SMTP Mail Server, Microsoft Terminal Services
†	Optional
*	Backup

## Appendix G - Manitou Remote Access

Remote access to Manitou through the Internet must be properly configured to provide adequate safety of the data.

- The remote access server should be isolated from the rest of the Manitou system in a perimeter network (DMZ) by a hardware based firewall.
- The firewall should be commercially available from a reputable vendor. Examples of an adequate firewall include:
  - Cisco PIX
  - Checkpoint FW
  - SonicWall Pro
- Access rules should be in place on the firewall to prevent any inbound connection other than the necessary TCP ports required by Manitou.
  - These ports should only be accessible only by the remote access server.
  - No inbound access should be available to the Manitou system from the Internet.
- The remote computer should be connected to the Internet by an access device that provides protection from the Internet.
  - At a minimum the device should provide Network Address Translation (NAT) and a private IP address to prevent inbound connection from the Internet.
  - This device may also include full firewall capability.
  - The remote computer should be password protected including a password protected screen saver.



## Appendix H - Manitou Language Utility

Manitou Language Utility provides a means for customers to define language(s) within the Manitou system.

### Non-Latin Character Sets

Since the ANSI Character set supports Latin Characters without a problem, the original Manitou Language Utility will support English, as well as the following languages:

- Afrikaans
- Albanian
- Basque
- Breton
- Catalan
- Danish
- Estonian
- Galician
- German
- Icelandic
- Irish (New Orthography)
- Italian
- Latin (Basic Classical Orthography)
- Leonese
- Occitan
- Portuguese
- Rhaeto-Romanic
- Scottish Gaelic
- Spanish
- Swahili
- Swedish

- Finnish
- Luxembourgish
- Walloon
- French
- Norwegian

Additionally, the following languages are commonly supported, but due to characters missing from the character set, they do not have complete coverage:

- Dutch
- Hungarian
- Maori
- Welsh

The Unicode Character Set supports the above listed Latin-derived languages, but also adds support for all languages based on the following scripts:

- Arabic
- Han (Chinese, Japanese, Korean Ideographs)
- Oriya
- Armenian
- Hangul
- Sinhala
- Bengali
- Hebrew
- Syriac
- Canadian Aboriginal Syllabics
- Hiragana
- Tamil
- Cherokee
- Kannada
- Telugu
- Cyrillic
- Katakana
- Thaana
- Devanagari
- Khmer
- Thai
- Ethiopic
- Lao
- Tibetan
- Georgian
- Malayalam
- Yi
- Greek
- Mongolian
- Gurmukhi
- Myanmar

## Translating into a Latin-based Language

The original Manitou Language Utility was written in VisualBasic 6. While VisualBasic 6 technically can support Unicode, the default for writing to the database occurs in ANSI. For those languages based on the Unicode List, there is an additional tool, the Manitou Translation Utility, which allows data to be written to the database without converting it to ANSI.

To translate Manitou into a Latin-Based language, please follow the steps below (further detail for each step is listed in the sub-topics below this list):

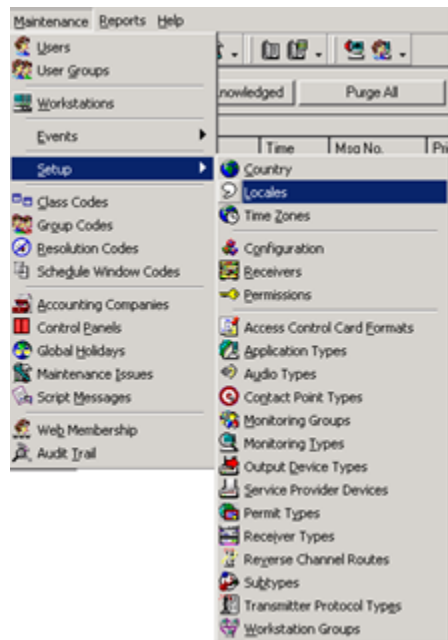
1. Create the Language (Locale) in Manitou
2. Create an ODBC Connection to the Database
3. Use the Manitou Language Utility to import the sample language (Spanish) into the database
4. Use the Manitou Language Utility to make changes to the desired Language
5. (Optional) If it is intended to be used again, export the translation.

For languages from the Unicode List, the following ADDITIONAL steps are required

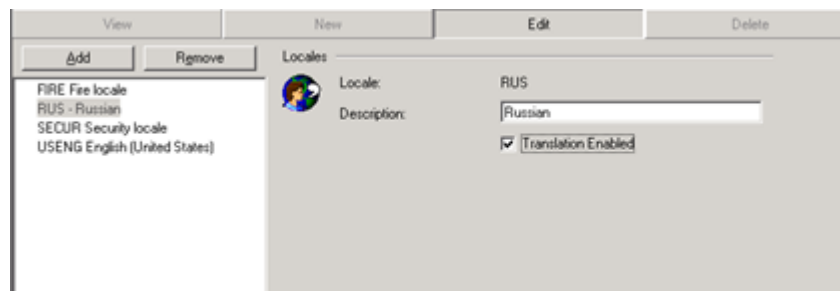
6. Open the Manitou Translation Utility
7. Translate for the Unicode Language
8. (Optional) Export the translation

## Creating the Language in Manitou

1. Open the Supervisor Workstation.
2. Click **Maintenance > Setup > Locales**.



3. Click **Edit**, then **Add** your new Language, making sure to mark the box for *Translation Enabled*.



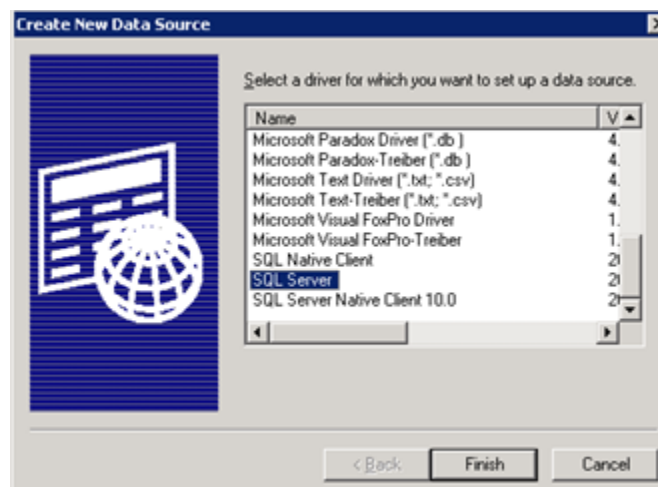
4. Click **Save**.

## Creating an ODBC Connection

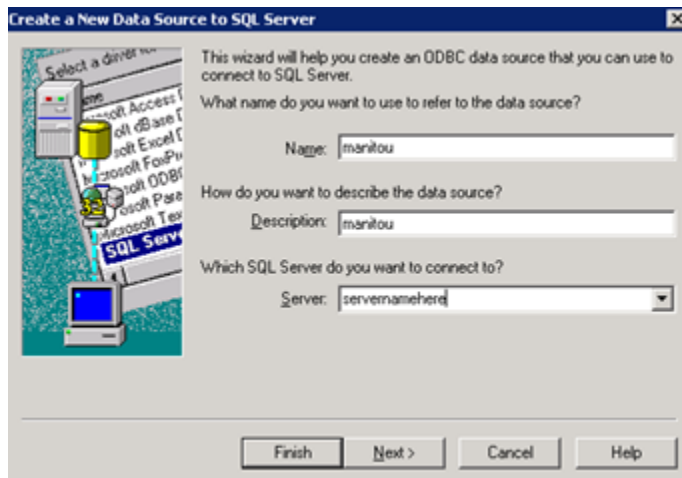
1. Click **Start > Administrative Tools > Data Sources (ODBC)**.



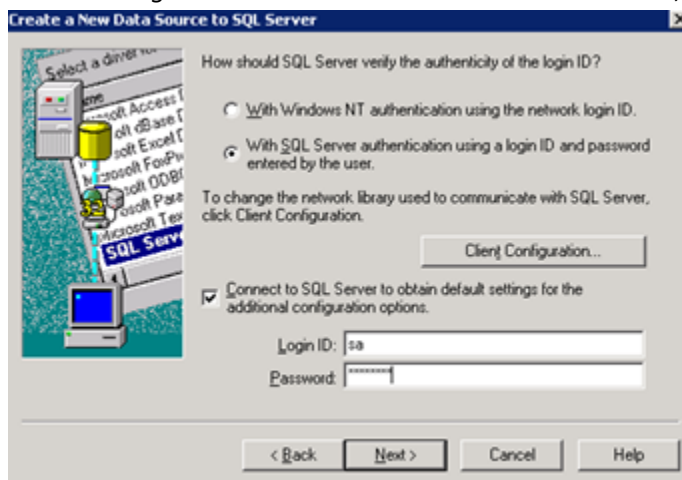
2. Click the tab labeled *System DSN*, and click the **Add** button.
3. On the *Create New Data Source* screen, scroll down until you find *SQL Server*, select it then click **Finish**.



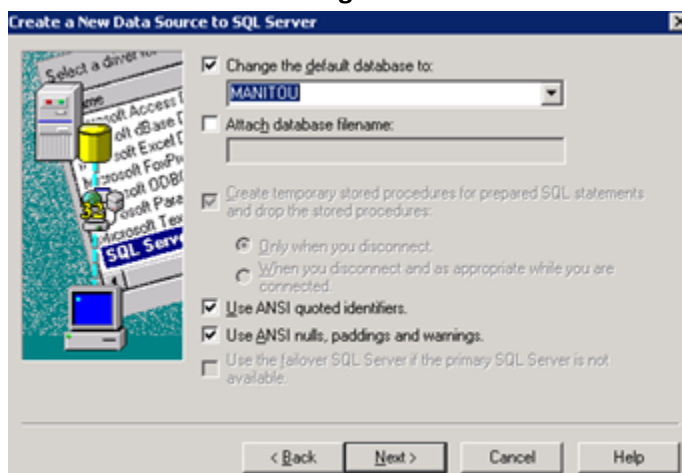
4. In the *Name* and *Description* fields, enter the word **Manitou** (without bold), and type the name of the server in the *Server* field. Then click **Next**.



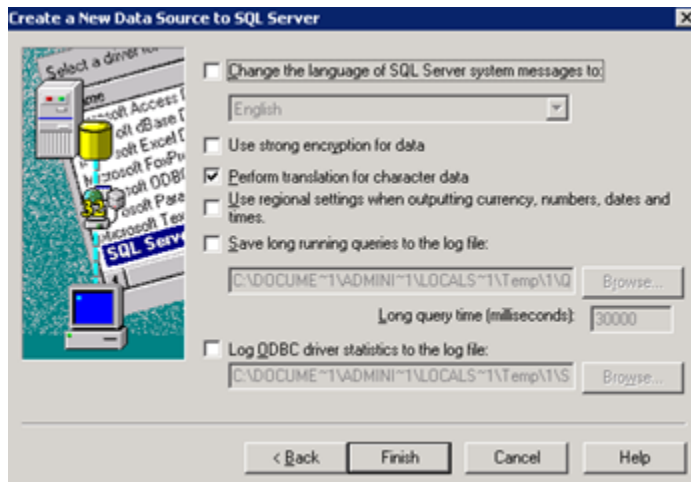
5. Fill in the *Login ID* and *Password* for the SQL connection, and click **Next**.



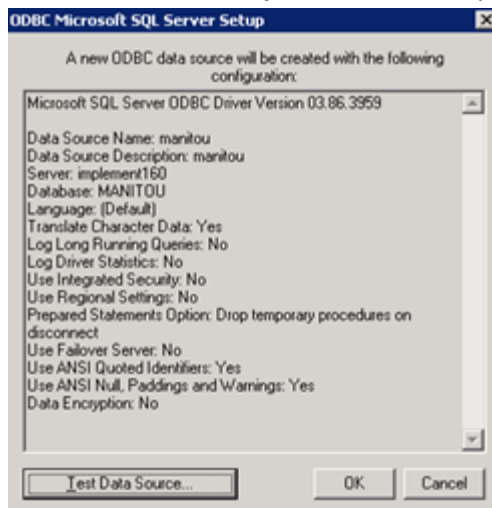
6. Click the checkbox for **Change the Default database to:** and input **Manitou**, and click **Next**.



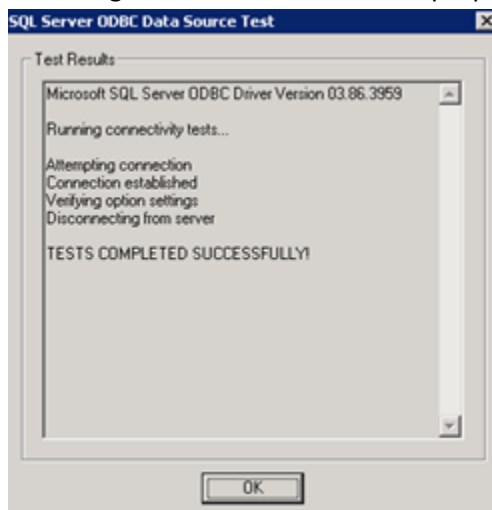
7. Click **Finish** on the final screen as shown below.



8. On the *ODBC Microsoft SQL Server Setup* box, click the button that says **Test Data Source...**



9. Assuming the details were entered properly, you should see a screen indicating success.

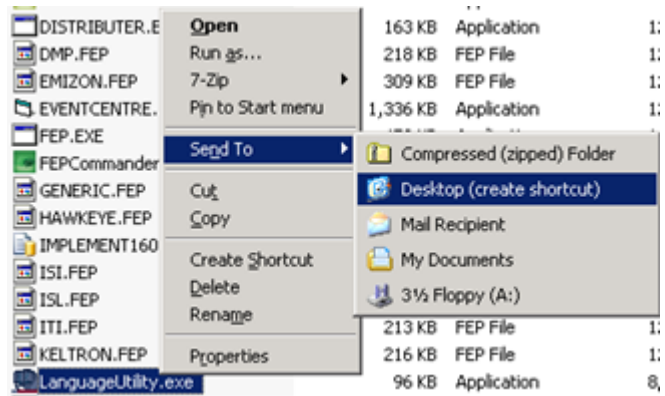




## Using the Language Utility to Import the Sample Language File

In order to run another language, it is necessary to import a sample language file. The following lays out the steps required to accomplish this task, using a Spanish language file as an example.

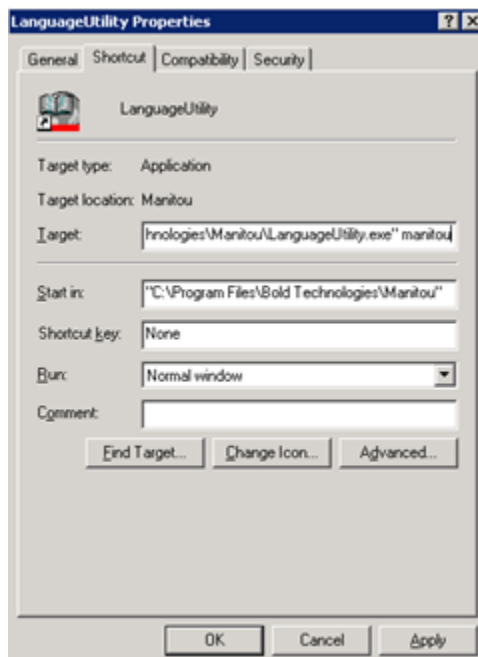
1. Create a shortcut to the LanguageUtility.exe file.



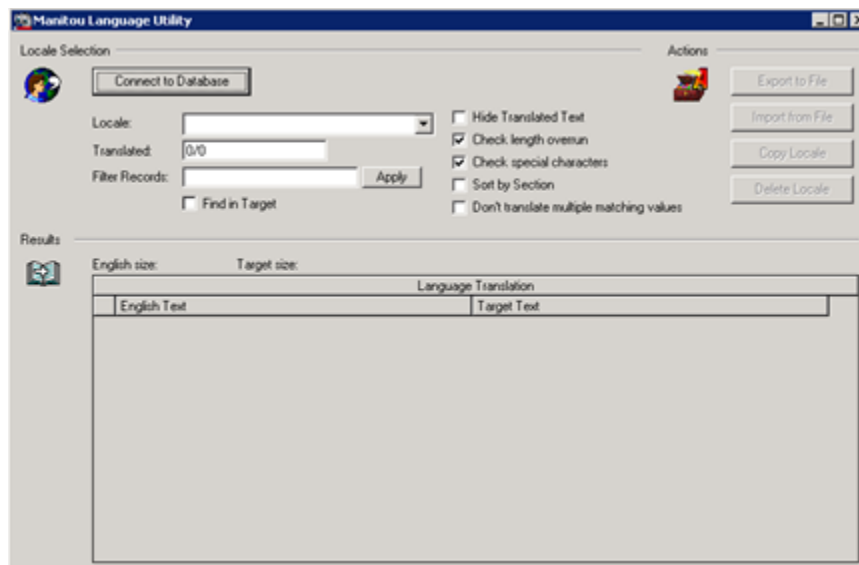
2. Edit the properties of the shortcut.



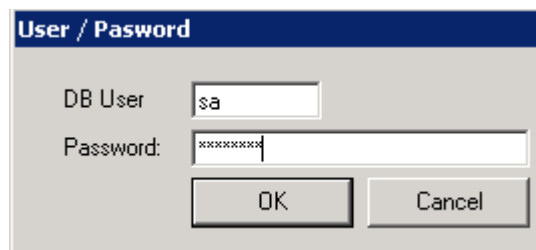
3. After the quote marks in the **Target** line, enter the name of the ODBC connection (Manitou, in this case), then click **OK**.



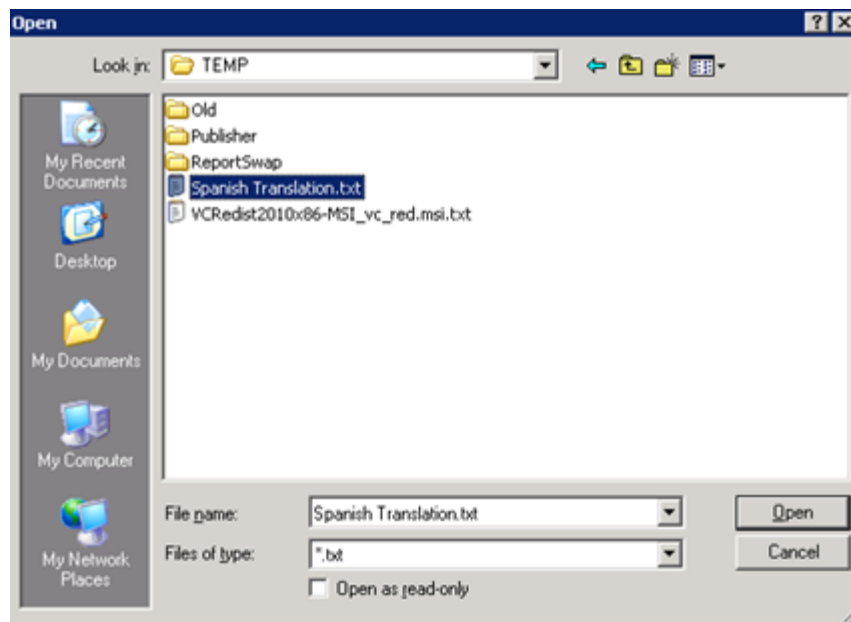
4. Open the *Language Utility* from the recently edited shortcut, and click on the **Connect to Database** button.



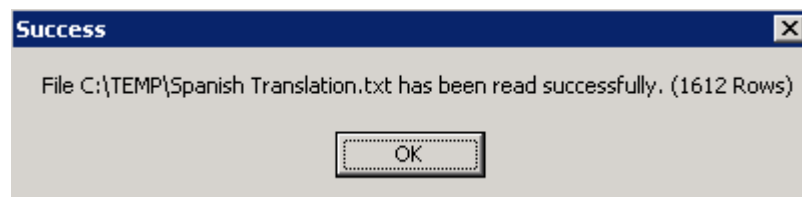
5. Enter the *Username* and *Password*, and click **OK**.



- Click on the **Import from File** button, and select the *Spanish Translation.txt* file (file can be found in the following link [Spanish Translation.txt](#)).



- You should get a screen indicating that the Translation has been read successfully.

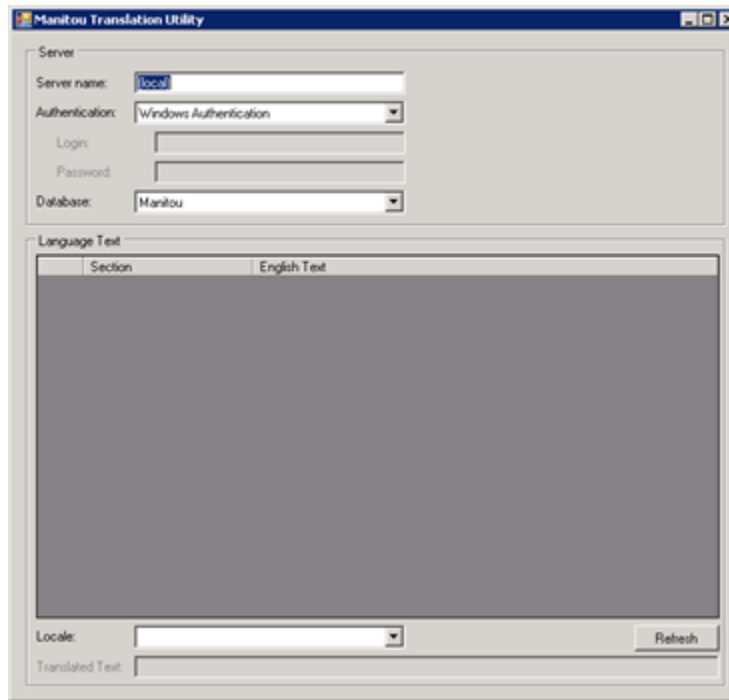


- Close the Language Utility.

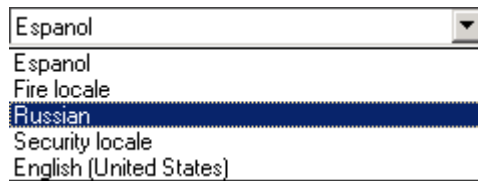
## Using the BoldTranslation Tool to Edit the Database

The database can be easily edited using the BoldTranslation Tool.

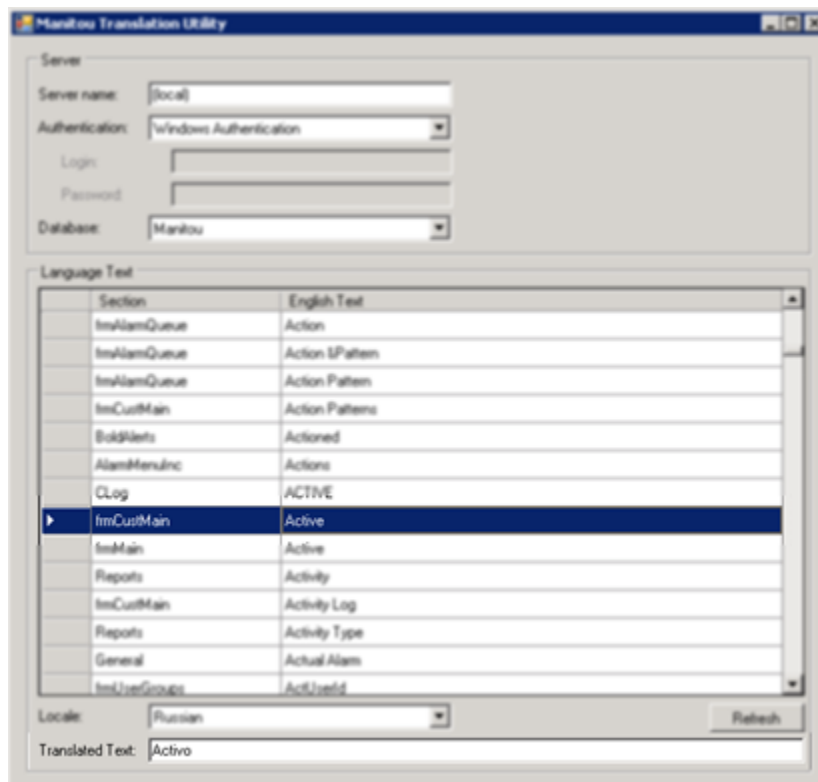
- Open the *BoldTranslation Tool*.



2. Specify the *Server name*, the type of *Authentication*, and the *Database*, then choose the *Locale*.



3. Locate the words in Manitou that need to be translated. Notice there is Spanish translated text on the bottom. This is because the source data was Spanish. It is okay, however, since we are going to be translating it to another language.



4. Type or paste the translated text into the *Translated Text* field at the bottom of the screen:

Translated Text:

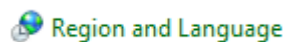
5. By clicking on another line, the just edited lines are saved. Repeat this process to translate all the words in the database. Entries where an Ampersand (&) appears show which letter will be highlighted in the English word. The placement of Ampersand characters during translation can be ignored.

## Windows Regionals Settings

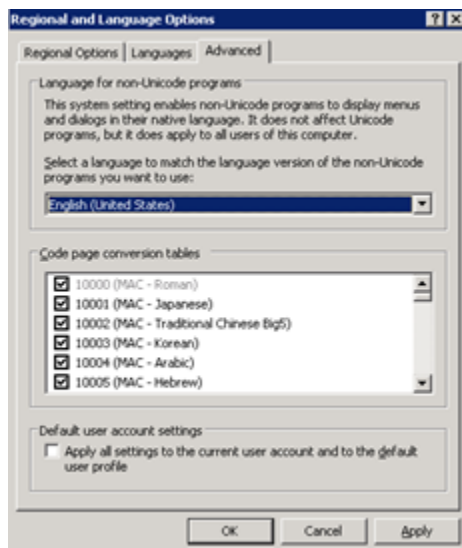
It is necessary to make sure the Windows Regionals Settings are set to the desired language once created and imported. This can be done whether working with Server 2003 or Server 2008.

### Making Sure Windows Regionals Settings are Set to Desired Language (Server 2003)

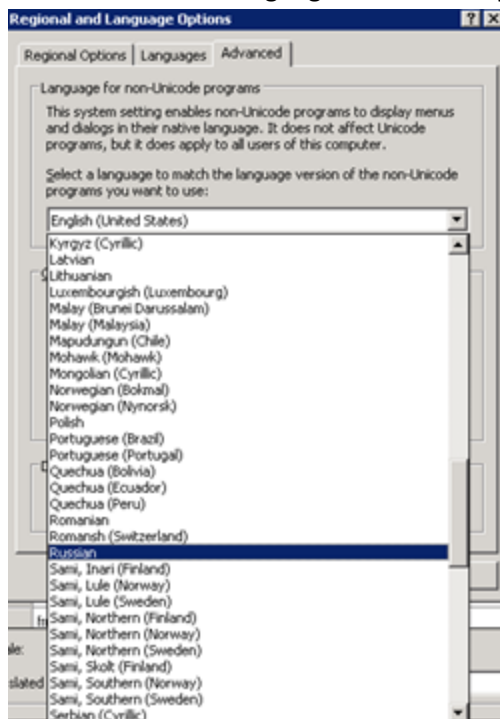
1. Open the *Control Panel* and select the *Region and Language* box.



2. Click on the *Advanced* tab.



3. Select the desired language from the dropdown menu, then click **OK**.

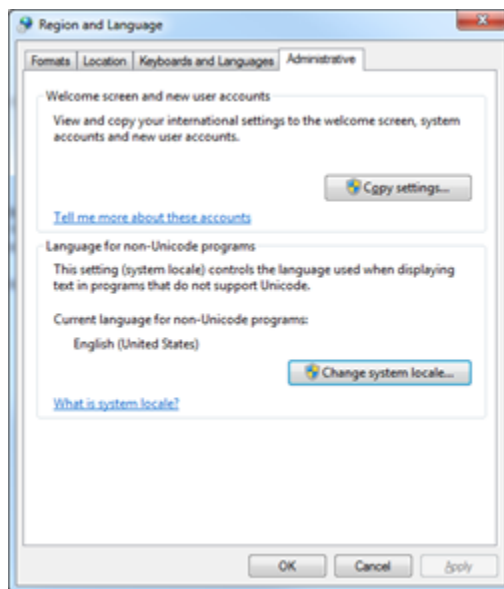


4. A reboot may be required at this point. This must be completed. Once the system is rebooted and the Manitou services started, log in using a user whose main locale is the newly created language. Items that were translated should be changed.

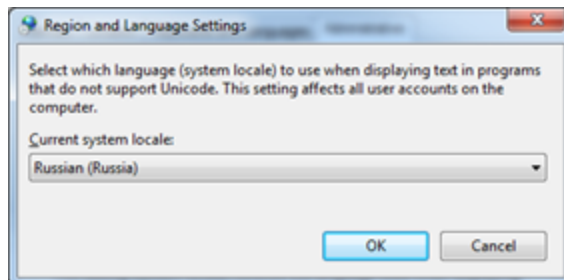


## Making Sure Windows Regionals Settings are Set to Desired Language (Server 2008)

1. Go to the *Control Panel* and select *Region and Language* (you may have to change the control panel mode to small icons to see the option). In the *Region and Language* dialog box, click the *Administrative* tab, then click on the **Change system locale...** button.



2. In the *Current system locale* selection dialog box, choose whichever locale is appropriate for your needs (in the below image, **Russian (Russia)** is available).



3. A reboot may be required at this point. This must be completed. Once the system is rebooted, and the Manitou services started, log in using a user whose main locale is the newly created language. Items that were translated should be changed.



## Appendix I - Audit Trail

The Audit Trail is designed to keep a detailed log or “trail” of changes made during data entry management. Previously, change logs were limited to the change itself, the Manitou user that made the change, the contact type and serial number of the account that was changed and basic category designation. With the new Audit Trail feature, logging and reporting of additions, updates and deletions of any portion of an account in Manitou will be logged.

The Audit Trail is not intended to be “change rollback” or “visual difference” functionality. The information that will be logged is related to data entry information. Some items such as images for mug shots and plan objects will not record old and new values. The audit will simply record the fact that an item was added, changed or deleted. This also does not include operation data changes (such as changing an area’s status to “open” or updating the next expected test signal for a transmitter). It also does not include changes related to maintenance issues.

### **The Audit Trail Does...**

...log any addition, updates or deletions of any portion of an account.

...captures anything in a contact record transaction.

### **The Audit Trail Does Not...**

...record operation data changes (changing an area’s status to open).

...log the next expected test signal for a transmitter.

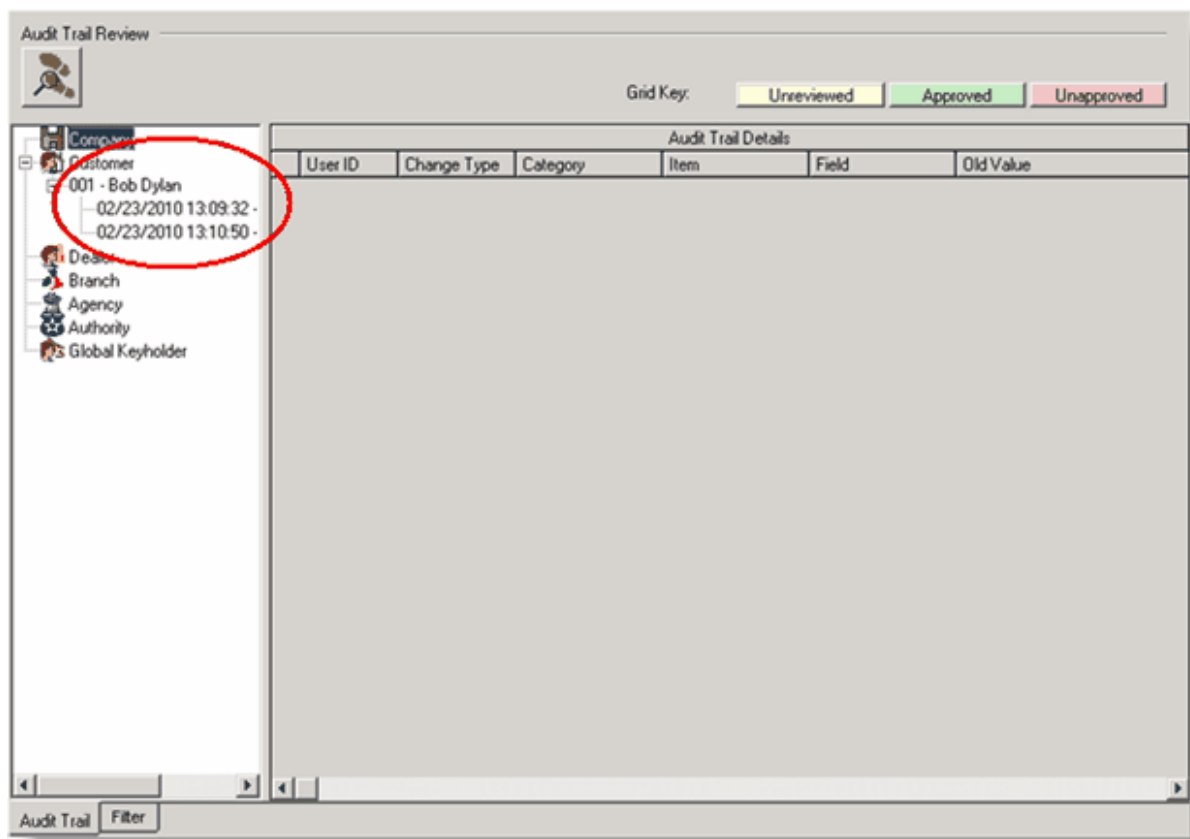
...include changes related to maintenance issues.

...”rollback” changes .

...show details on additions or deletions of data.

The main Audit Trail form can be found by logging into OWS and selecting **Maintenance > Audit Trail**. The main *Audit Trail Review* tab on the form displays a tree of all data entry activity that has been logged in the amount of time between logging in to a Manitou session. In the example below, a customer – 001 Bob Dylan – was added and now appears in the Audit Trail Review tree:





Audit Trail example

Expanding the **Customer** shows the dates and times at which edits, additions or deletions were made to the account. Let's click on one of the dates to display more information in the Audit Trail Grid:

Audit Trail Details						
User ID	Change Type	Category	Item	Field	Old Value	New Value
BOLD	Add	Entity	Customer 001			

Audit Trail Grid

The grid contains several read-only fields that give more information as to what type of change was made to the account.

***Did you know..***

You can resize column widths so they can be easily viewed on one screen without having to scroll across the Audit Trail Details form. Place your mouse over the line to the right side of the column heading until the cursor becomes a plus. Hold down the left button on the mouse and drag the line to either side until the column is the width you want.

**User ID** – the Manitou User ID of the person logged in that made the change to the account. This could be an operator, a data entry person, or an administrator, just to name a few examples.

**Change Type** – this field describes the type of change that took place. In this example, the customer was added, so “Add” is displayed in the field.

**Category** – The category gives an indication as to what form was changed, added or deleted on the account or entity. For example, if a transmitter was added to an account, the Category would indicate that the Systems form changed.

**Item** – This indicates the item type (such as an address or the field) that was changed.

**Field** – In the case of an edit to an account or entity, the field in the actual account that was changed will display in the Field form. For example, if an address was edited, this field would show “Address”, as in the example below:

Audit Trail Details						
	Change Type	Category	Item	Field	Old Value	New Value
►	Update	Address	Address Type:	Address 1	789 W. Hollywood	789 W. Hollywood
	Update	Address	Address Type:	Street	HOLLYWOOD	HOLLYWOOD BLVD

This field, at times, can be very detailed. In this example, we can see that both the Address 1 field and – even more specific – the Street field were changed.

**Old Value/New Value** – These fields display what the previous data in the field was, and what the changed data is. We can see in the example that the old Address was 789 W. Hollywood Boulevard, and the new value is 789 W. Hollywood Blvd.

**The Review ID/Review Date** – These fields indicate the date that a review of the change was made and marked as approved/unapproved, and who authorized the change. Approval and disapproval of the changes occur in the supervisor workstation.

**Comment** – any note given by the authorized person on the changed account.

The status of the change is noted by the color of the log line. Yellow indicates unreviewed changes, while green indicates an approved change. Red means that the change was rejected, but note that this does not automatically undo the change that was made. Users must manually go back to the account and undo the changes made to the account.

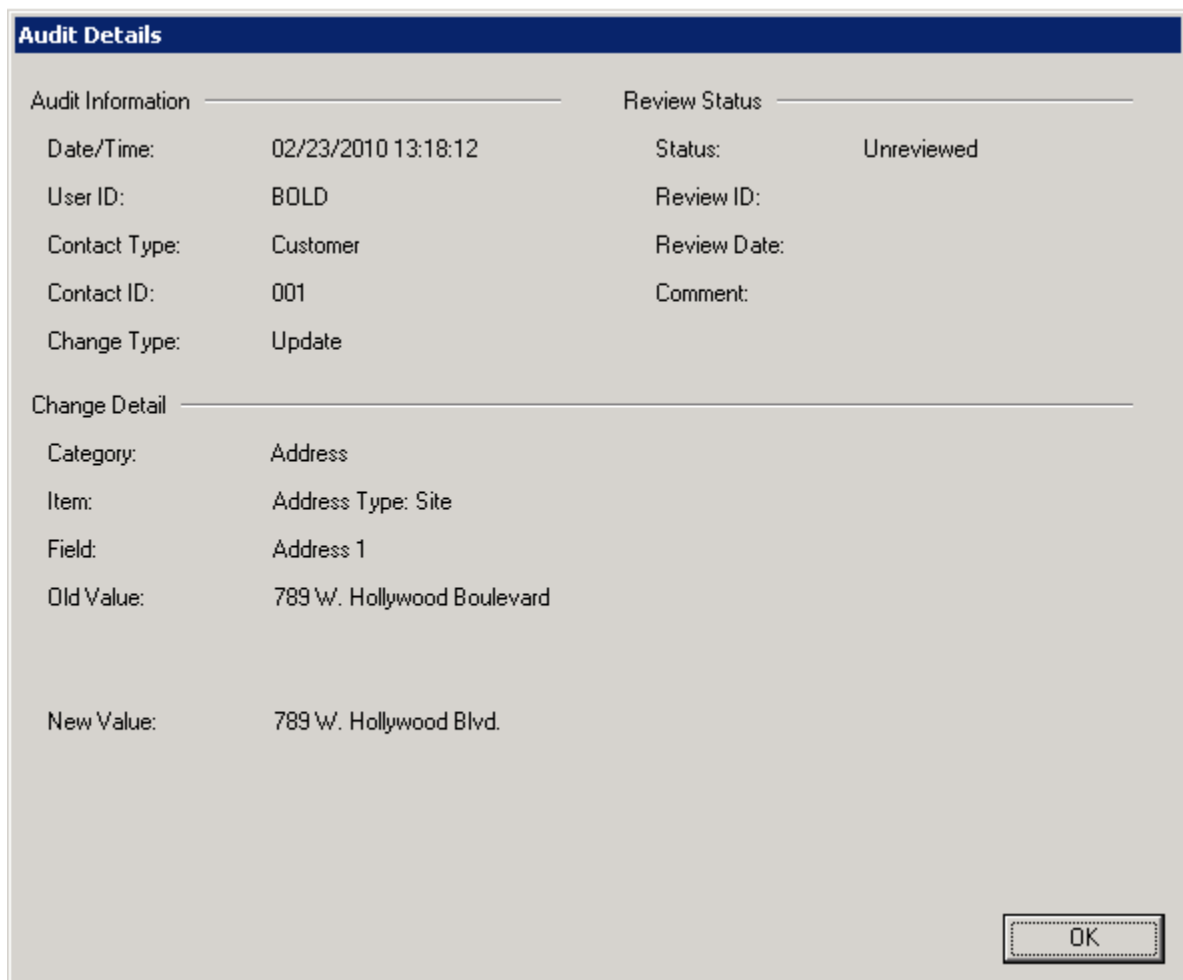
Did you know you can quickly access the changed account by right-clicking on the log line in the Audit Trail Review form?

Audit Trail Details					
	Change Type	Category	Item	Field	Old Value
►	Update	Address	Address Type:	Address 1	789 W. Hollywood Boulevard
	Update	Address	Address Type:	Street	HOLLYWOOD BOULEVARD

If you're unsure where a change was made, or just want to view the form, right click and select "Go to Record." This will bring you to the form where the change was made. While it won't highlight the actual field, it will at least give you quick access to review the changes, which is useful in the event that they are unapproved.

## Audit Details

Double-click on a line in the *Audit Trail Review* form to bring up the *Audit Details* dialog.

The image shows a software dialog box titled "Audit Details". It is divided into three main sections. The first section, "Audit Information", contains fields for Date/Time (02/23/2010 13:18:12), User ID (BOLD), Contact Type (Customer), Contact ID (001), and Change Type (Update). The second section, "Review Status", contains fields for Status (Unreviewed), Review ID, Review Date, and Comment. The third section, "Change Detail", contains fields for Category (Address), Item (Address Type: Site), Field (Address 1), Old Value (789 W. Hollywood Boulevard), and New Value (789 W. Hollywood Blvd.). An "OK" button is located in the bottom right corner of the dialog box.

Audit Information		Review Status	
Date/Time:	02/23/2010 13:18:12	Status:	Unreviewed
User ID:	BOLD	Review ID:	
Contact Type:	Customer	Review Date:	
Contact ID:	001	Comment:	
Change Type:	Update		

Change Detail	
Category:	Address
Item:	Address Type: Site
Field:	Address 1
Old Value:	789 W. Hollywood Boulevard
New Value:	789 W. Hollywood Blvd.


OK

Audit Details log

This dialog summarizes the changes in one convenient form.

## Audit Trail in the Activity Log and System Log

An **Audit Trail** detail can also be accessed by clicking on the *Customer's Activity Log* and double-clicking on any log line that contains a "SAVE" edit:

Customer Activity Log			
 <input type="button" value="More"/> <input type="button" value="Comment"/> <input type="button" value="Resolution Code"/>			
Date	Time	Log Description	User ID
02/24/2010	10:02:10	VIEW - Customer Opened for View	BOLD
02/24/2010	08:49:42	VIEW - Customer Opened for View	BOLD
02/23/2010	14:33:32	VIEW - Customer Opened for View	BOLD
02/23/2010	13:18:12	SAVE - Customer Details Saved	BOLD
02/23/2010	13:17:59	EDIT - Customer Opened for Edit - Auth: Operator	BOLD
02/23/2010	13:10:50	TRANSMITTER - Added TX: 1	BOLD
02/23/2010	13:10:50	SAVE - Customer Details Saved	BOLD
02/23/2010	13:09:49	EDIT - Customer Opened for Edit - Auth: Operator	BOLD
02/23/2010	13:09:34	VIEW - Customer Opened for View	BOLD
02/23/2010	13:09:32	ACTIVE - Customer Monitoring Activated	BOLD
02/23/2010	13:09:32	SAVE - Customer Details Saved - New customer	BOLD

Customer Activity Log

The *Audit Trail* tab in the Log Details dialog is similar to the Audit Trail form when displaying details of that particular edit:

Log Details						
	Change Type	Category	Item	Field	Old Value	New Value
►	Update	Address	Address Type:	Address 1	789 W. Hollywood Boulevard	789 W. Hollywood Blvd.
	Update	Address	Address Type:	Street	HOLLYWOOD BOULEVARD	HOLLYWOOD BLVD

Audit Trail, Log Details

Users can right-click and select the **Go To Record** option to go to the form where the change was made. It contains the same fields as the Audit Trail.

Additionally, an Audit Trail detail can be accessed by clicking on the [System Log](#) and double-clicking on any log line that contains an “EDITS” entry:

System Log 45 Records:				
Date/Time	Category	Qualifier	Event Text	
03/01/2010 08:07	Log On/Log Off	Logged On	Bold Technologies	
02/24/2010 14:08	Log On/Log Off	Logged Off	Bold Technologies	
02/24/2010 14:08	Log On/Log Off	Logged Off	Bold Technologies	
02/24/2010 13:16	Log On/Log Off	Logged On	Bold Technologies	
02/24/2010 13:16	Edits	Customer	Edit 001 - Bob Dylan	
02/24/2010 13:16	Edits	Customer	Edit 001 - Bob Dylan	
02/24/2010 10:02	Log On/Log Off	Logged On	Bold Technologies	
02/24/2010 09:11	Log On/Log Off	Logged Off	Bold Technologies	
02/24/2010 09:10	Log On/Log Off	Logged Off	Bold Technologies	

Audit Trail, System Log

This will bring up the *Audit Details* form

Audit Details			
Audit Information		Review Status	
Date/Time:	02/23/2010 13:18:12	Status:	Unreviewed
User ID:	BOLD	Review ID:	
Contact Type:	Customer	Review Date:	
Contact ID:	001	Comment:	
Change Type:	Update		
Change Detail			
Category:	Address		
Item:	Address Type: Site		
Field:	Address 1		
Old Value:	789 W. Hollywood Boulevard		
New Value:	789 W. Hollywood Blvd.		
OK			

Audit Details form

This dialog summarizes the changes in one convenient read-only form. Click **OK** to return to the *Audit* form.

## Search Filter

The *Audit Trail Search* form is similar to other search forms in OWS. Users can filter out searches by Review Code, the source of the change (such as an operator or the Manitou User ID), the date of the change, the contact or contact type, or the date of the change or review.

The screenshot displays the 'Audit Trail Search' form with the following sections and controls:

- Review Code:** A blue checkmark icon and a list box containing 'Unreviewed', 'Approved', and 'Unapproved'.
- Source of Change:** A globe icon and a list box containing 'Operator', 'VRT/MediaGateway', and 'Web'.
- Change Date:** A calendar icon, 'Date From:' (02/24/2010), 'Date To:' (02/24/2010), and time pickers (00:00:00 to 23:59:59).
- Review Date:** A calendar icon, a 'Filter by Review Date' checkbox, and empty date/time pickers.
- Contact Type:** A person icon and a list box containing 'Company', 'Customer', 'Dealer', 'Branch', 'Agency', 'Authority', and 'Person'.
- User:** A person icon, 'User ID:' dropdown, and 'Review ID:' dropdown.
- Contact ID:** A person icon, 'Contact ID From:' text box, and 'Contact ID To:' text box.
- Buttons:** 'Search' and 'Clear' buttons at the bottom right.

Review Code form

Users can only select dates in the **Filter by Review Date** fields if the checkbox is checked.

Once the parameters are set, click **Search**. The search results will appear back in the main *Audit Trail Review* form.

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