Creating a Complex Call Lists

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Introduction

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

Example Customer request:

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

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

Preparation

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

An example of items to review and prepare:

- Office hours are 07:30 to 16:30 Monday through Friday.
- Outside of those hours contact the on-call person's phone.
    - Who is the first on-call person that is active at this time?
    - Who are the others who will rotate on-call?
    - What time of day and which day do they transfer the on-call responsibility?
    - What is the on-call schedule?
    - Who should we contact in the event that no one is listed as on-call? Below is an example of the answers:
- Outside of those hours contact the on-call person's phone.
    - Who is the first on-call person that is active at this time? Name / phone
    - Who are the others who will rotate on-call?
        - Name 1 / phone
        - Name 2 / phone
        - Name 3 / phone
    - What time of day and which day do they transfer the on-call responsibility?
    - What is the on-call schedule order for these people?
    - Who should we contact in the event that no one is listed as on-call? Name / phone

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

General Schedule for Office Hours:

1. Navigate to the Customer record.

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

Continue entering the General Schedules for all persons and availability. After entering all General Schedules for this account, save the Record.

General Schedule Edit

Schedule ID: DAYS
Description: Office Hours

Schedule Type

○ Keyholder Availability ○ Programming ○ Access Control ◉ Call List Availability ○ Reminder ○ Action Pattern

MON	TUE	WED	THU	FRI	SAT	SUN	START1	END1	START2	END2	FROM	TO	
☑	☑	☑	☑	☑	☐	☐	07:30	16:30			▼	▼	✕

ADD

CANCEL   DONE

DAYS - Office Hours

OC1 - On call person...
OC2 - On Call Person...
OC3 - On Call Person...
OC4 - On Call Person...

OC1

Description: On call person 1
Type: Call List Availability

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Start 1	End 1	Start 2	End 2	From	To
☐	☐	☐	☐	☑	☐	☐	16:30	23:59			06/16/2017	06/16/2017
☑	☑	☑	☑	☐	☑	☑	00:00	23:59			06/17/2017	06/22/2017
☐	☐	☐	☐	☑	☐	☐	00:00	16:29			06/23/2017	06/23/2017
☐	☐	☐	☐	☑	☐	☐	16:30	23:59			07/14/2017	07/14/2017
☑	☑	☑	☑	☐	☑	☑	00:00	23:59			07/15/2017	07/20/2017
☐	☐	☐	☐	☑	☐	☐	00:00	16:29			07/21/2017	07/21/2017

OC2

Description: On Call Person 2
Type: Call List Availability

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Start 1	End 1	Start 2	End 2	From	To
☐	☐	☐	☐	☑	☐	☐	16:30	23:59			06/23/2017	06/23/2017
☑	☑	☑	☑	☐	☑	☑	00:00	23:59			06/24/2017	06/29/2017
☐	☐	☐	☐	☑	☐	☐	00:00	16:29			06/30/2017	06/30/2017
☐	☐	☐	☐	☑	☐	☐	16:30	23:59			07/21/2017	07/21/2017
☑	☑	☑	☑	☐	☑	☑	00:00	23:59			07/22/2017	07/27/2017
☐	☐	☐	☐	☑	☐	☐	00:00	16:29			07/28/2017	07/28/2017

OC3

Description: On Call Person 3
Type: Call List Availability

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Start 1	End 1	Start 2	End 2	From	To
☐	☐	☐	☐	☑	☐	☐	16:30	22:35			06/30/2017	06/30/2017
☑	☑	☑	☑	☐	☑	☑	00:00	23:59			07/01/2017	07/06/2017
☐	☐	☐	☐	☑	☐	☐	00:00	16:29			07/07/2017	07/07/2017
☐	☐	☐	☐	☑	☐	☐	16:30	23:59			07/28/2017	07/28/2017
☑	☑	☑	☑	☐	☑	☑	00:00	23:59			07/29/2017	08/03/2017
☐	☐	☐	☐	☑	☐	☐	00:00	16:29			08/04/2017	08/04/2017

OC4

Description: On Call Person 4
Type: Call List Availability

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Start 1	End 1	Start 2	End 2	From	To
☐	☐	☐	☐	☑	☐	☐	16:30	23:59			07/07/2017	07/07/2017
☑	☑	☑	☑	☐	☑	☑	00:00	23:59			07/08/2017	07/13/2017
☐	☐	☐	☐	☑	☐	☐	00:00	16:29			07/14/2017	07/14/2017
☐	☐	☐	☐	☑	☐	☐	16:30	23:59			08/04/2017	08/04/2017
☑	☑	☑	☑	☐	☑	☑	00:00	23:59			08/05/2017	08/10/2017
☐	☐	☐	☐	☑	☐	☐	00:00	16:29			08/11/2017	08/11/2017

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

Contact List verification:

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

Contacts

Name	Type
John Martin	Keyholder
Bryan Best	Keyholder
John Smith	Keyholder
Sally Johnson	Keyholder
Keith King	Technician
Jeremy Johnson	Keyholder
Mary Smith	Contact

Call List Addition:

1. Navigate to the Call List form and click the plus sign to add a new call list in the Main or Sublist section. (A Main List may contain persons and entities. A Sublist may only contain people.)
2. Enter the Call list name/ID
3. Enter a Description.
4. Repeat the process until all call lists are entered. Remember! to include the Out of Hours Main call list. This will call the first Sublist. Also add a "When All Else Fails" call list containing the person to call when there is not an active person shown to be on call.
5. Click OK.
6. Save the record.

Main Lists

DAYS - Daytime Call Li...

OOH - Out of Hours

Sub Lists

OC1 - On Call 1

OC2 - On Call 2

OC3 - On Call 3

OC4 - On Call 4

WAEF - When All Else F...

DAYS - Daytime Call List

Rotates ☐

Contacts

Name
John Smith

After creating all the call lists, return to the Main lists and link the first General Schedule to the first Main Call List. Then defer that Call list to the outside of the defined hours. This list should contain the first On Call Sub list.

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

Click the Edit pencil on the first Sub List and add the schedule and defer to the next On Call Call List. Repeat until the last Call List where you defer to the When All Else Fails Call List that doesn't receive a Schedule or a deferment.

Save the record.

In order to test the solution, the action pattern must call the top call list. If there is already an action pattern in place that calls this call list you don't need to make any changes. Otherwise, the following steps through creating the Contact Customer Call List Action in an Action Pattern within Manitou 2.0.

- Navigate to the Action Patterns section of the Customer record.
- Select the action pattern to be used for this call list.
- Select the Daytime Call list, and click Apply.
- Move it up, or down, by dragging it up or down within the action pattern.
- When it is in the correct position click Done then Save the record.
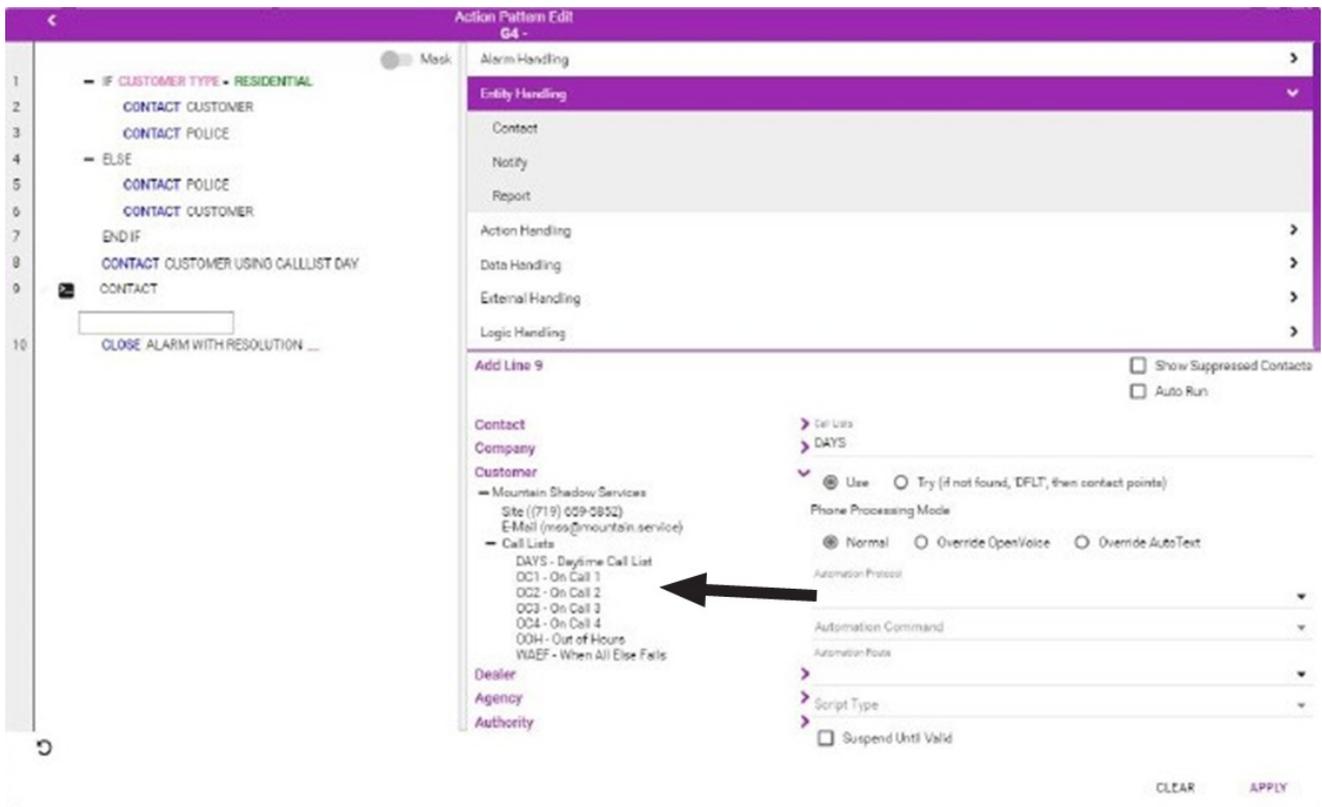
With all the elements in place, it is time to test the solution. If the current day and time are within the first call list availability, add a single line to the DAYS General schedule to make the hours available from 07:30 to the current time on the End 1 time, then in the Start 2 field enter a time approximately 15 minutes from now, to allow for the testing, then set the End 2 to the 16:30 time. Once that is correct, save the record and send a manual signal (a quick reference guide is available in the BoldGenius Resource Library) that trips the selected action Pattern.

- Did the correct Action Pattern show?
- When selecting 'Do' on the DAYS call list Action Pattern did the Out of Hours Show on the "Process Action Call List?"
- When drilling into the On Call Call List did the correct person on-call show? If the answer is yes to all of these questions, you are good to go.

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

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

- Did the correct Action Pattern show? No.
  - Check the Event Actions Programming on the customer, transmitter, and check the default action pattern for the Event Code. There is usually something overriding the default Action pattern for the event.
  - If needed, you may add an Event Actions Programming line to your testing event code to be sure the correct action pattern is directly linked to the event.
- When selecting 'Do' on the DAYS call list Action Pattern did the Out of Hours Show on the "Contact Customer Call List?"
  - Is the action pattern right? If not, see above.

- - Is the DAYS call list linked to the correct General Schedule?
    - Did you save the change to the General Schedule to put the DAYS schedule out of hours?
- When drilling into the OOH call list did the correct person on-call show?
  - Does the person have the correct General Schedule?
  - Are there any conflicting days/times?

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

With a little planning, and some trial and error, it is possible to meet many customer requests utilizing Manitou 2.0's core features.