

SWS - Forms in the Maintenance Menu - Maintenance Issues

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:



Logbook #	Issue ID	Type	Contact ID	Name	Person ID	Name	Description	Status	Last Action	Technician	Create New
05-25-2014 11:53:30	8532	Customer	10012217	Alan Alexander		Control	new issue	new issue	05-25-2014 11:53:30		Create New
05-27-2014 14:36:59	8532	Customer	10012218	Richard and Ruthing		inf			05-27-2014 14:36:59		Create New
05-27-2014 14:14:57	8532	Customer	10012218	Blue Fish		Public Fish	Site contracting (201) 485-1320	10012218	05-27-2014 14:17:19		Create New
05-26-2014 08:30:49	8532	Customer	10012218	Blue Fish		Public Fish	Site contracting (201) 485-1320	10012218	05-26-2014 10:11:12		Create New
07-05-2014 12:12:14	10012218	Customer	10012218	Blue House		High School	new office number please	inf	10-05-2014 13:34:19		Create New
07-05-2014 14:36:57	10012218	Customer	10012218	Cherene Temple			Please see (201) 485-1320	inf	05-26-2014 13:57:57		Create New
06-19-2014 11:48:19	8532	Customer	10012218	Yvonne Markson		Person not on file	10012218				Create New
05-25-2014 13:44:57	8532	Global	10012218	Ray Condit		test		gph	10-25-2014 12:25:22	Ray Condit	Create New
05-25-2014 09:52:47	10012218	Dealer	10012218	Q&E Dealer		Market Leader	testing 123	inf	05-25-2014 09:52:47		Create New
05-25-2014 10:37:32	8532	Customer	10012218	Veran's Account		Contact One	lighting	inf	05-25-2014 10:36:38		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: 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:

Logged At	Issue ID	Type	Contact ID	Name	Person ID	Name	Description	Notes	Last Action	Technician	Create New
10/29/2014 11:51:36	3032	Customer	10012121	Blue Intermity		Contract	new issue	new issue	10/29/2014 11:51:36		Create New
10/27/2014 14:26:19	3032	Customer	10424242	Northgate get nothing		Contract	not		10/27/2014 14:26:19		Create New
10/27/2014 14:14:27	3032	Customer	10424242	Blue Fuel		Public Fuel	Ever contacting (202) 405-1321	10/27/2014 14:14:27	10/27/2014 14:14:27		Create New
10/26/2014 16:36:59	3032	Customer	10424242	Blue Fuel		Public Fuel	Ever contacting (202) 405-1321	10/26/2014 16:36:59	10/26/2014 16:36:59		Create New
10/25/2014 12:12:16	3032	Customer	10424242	Business House		High school	new office number please	10/25/2014 12:12:16	10/25/2014 12:12:16		Create New
10/23/2014 14:36:37	3032	Customer	10424242	Clearance Garage		High school	Describe with Owner's name	10/23/2014 14:36:37	10/23/2014 14:36:37		Create New
10/19/2014 11:49:18	3032	Customer	10424242	Water Hydrant		Person not on file	gosh	10/19/2014 11:49:18	10/19/2014 11:49:18		Create New
10/20/2014 14:44:27	3032	Global	10012121	King Contract		Water		10/20/2014 14:44:27	10/20/2014 14:44:27		Create New
10/25/2014 10:52:40	3032	Dealer	10424242	QR Encoder		Richard Encoder	Testing 123	10/25/2014 10:52:40	10/25/2014 10:52:40		Create New
10/25/2014 10:27:22	3032	Customer	10012121	Camera Account		Camera One	lighting	10/25/2014 10:27:22	10/25/2014 10:27:22		Create New

3. 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] Technician: [Dropdown]

Tech On Site:

Priority: [0] [Spinners] Appt Date: [Dropdown] 12:00:00 AM [Spinners]

Issue: 0 Service Type: [Dropdown]

Logged: 10/29/2014 14:37:28 Last Action:

User: BOLD Resolved:

Description: [Text Area]

Save Changes Cancel

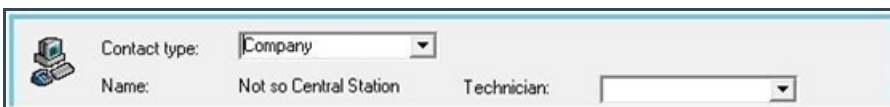
4. Select an option from the “Contact type:” menu as shown in the following screenshot:



Result: If you selected any option other than “Company”, the “Contact ID:” menu displays as shown in the following screenshot:

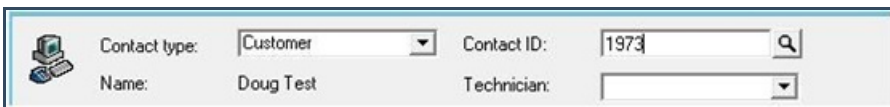


Note: If you selected the “Company” option, the “New Maintenance Issue” window now displays with the company name as shown in the following screenshot:

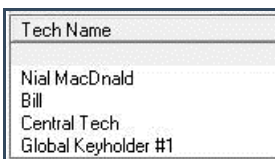


5. If you selected an option from the “Contact type:” field that is anything other than “Company”, enter a contact ID into the “Contact ID:” field, then press “Enter”.

Result: The entity name now displays on the “New Maintenance Issue” window as shown in the following screenshot:



6. Select a technician from the “Technician:” dropdown menu as shown in the following screenshot:



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 is displayed in the list as shown in the following screenshot:



Editing an Existing 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
06/05/2014 11:57:38	803,2	Customer	1001215	Star Monitoring		Contact	new issue	new issue	06/05/2014 11:57:38		Create New
06/07/2014 14:06:56	803,2	Customer	1001215	Star Monitoring		Contact	new issue	new issue	06/07/2014 14:06:56		Edit Selected
06/07/2014 14:14:27	803,2	Customer	1001215	Star Monitoring		Phone Fax	Emergency (202) 405-1320	Star Monitoring	06/07/2014 14:17:19		Assign Technician
06/08/2014 06:30:59	803,2	Customer	1001215	Star Monitoring		Phone Fax	Emergency (202) 405-1320	Star Monitoring	06/08/2014 06:37:12		Assign Technician
07/05/2014 12:12:18	1001215	Customer	1001215	Star Monitoring		Phone Fax	Emergency (202) 405-1320	Star Monitoring	07/05/2014 12:12:18		Assign Technician
07/05/2014 14:36:37	1001215	Customer	1001215	Star Monitoring		Phone Fax	Emergency (202) 405-1320	Star Monitoring	07/05/2014 14:36:37		Assign Technician
08/19/2014 11:48:18	803,2	Customer	1001215	Star Monitoring		Phone Fax	Emergency (202) 405-1320	Star Monitoring	08/19/2014 11:48:18		Assign Technician
08/20/2014 11:44:27	803,2	Customer	1001215	Star Monitoring		Phone Fax	Emergency (202) 405-1320	Star Monitoring	08/20/2014 11:44:27		Assign Technician
08/20/2014 09:02:40	1001215	Customer	1001215	Star Monitoring		Phone Fax	Emergency (202) 405-1320	Star Monitoring	08/20/2014 09:02:40		Assign Technician
08/20/2014 10:37:32	803,2	Customer	1001215	Star Monitoring		Phone Fax	Emergency (202) 405-1320	Star Monitoring	08/20/2014 10:37:32		Assign Technician

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	Create New
06/07/2014 14:06:56	803,2	Customer	1001215	Star Monitoring		Contact	new issue	new issue	06/07/2014 14:06:56		Create New

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

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 is displayed in the grid 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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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: Contact ID:

Name: Technician:

Person: Tech On Site:

Priority: Appt Date:

Issue: Service Type:

Logged: Last Action:

User: Resolved:

Description:

Notes:

New Notes:

Resolved


- When you are ready to close the Maintenance Issue, select the “Resolved” checkbox, then click “Save Changes”.

Result: The Maintenance Issue now displays gray in the grid as shown in the following screenshot:

10/29/2014 16:52:22	UNPAID Customer	106559	Replace Battery	3	10/30/2014 12:49:02
10/29/2014 15:48:45	BOLD Customer	1973	Doug Test	3	10/29/2014 12:56:18 Nial MacDnald

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: <input type="text" value="Customer"/>	Contact ID: <input type="text" value="1973"/>
	Name: Doug Test	Technician: <input type="text" value="Nial MacDnald"/>
	Person: <input type="text"/>	Tech On Site <input checked="" type="checkbox"/>
	Priority: <input type="text" value="3"/>	Appt Date: <input type="text" value="10/29/2014"/> <input type="text" value="9:00:00 AM"/>
	Issue: 106559	Service Type: <input type="text" value="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

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, then select the “Maintenance Issues” option as shown in the following screenshot:



Result: The “Maintenance Issues” form displays as shown in the following screenshot:

Log#	Date	Type	Contact ID	Name	Person ID	Name	Description	Notes	Last Action	Technician	Create Date
36/25/2014 11:50:36	36/25	Customer	10011217	Blue International		Contract	new issue	new issue	36/25/2014 11:50:36		36/25/2014 11:50:36
36/27/2014 14:26:58	36/27	Customer	10012428	Northall get nothing		Contract	not		36/27/2014 14:26:58		36/27/2014 14:26:58
36/27/2014 14:14:27	36/27	Customer	10012428	Blue Fun		People Fun	Ever contacting (24) 405-1-23	10012428	36/25/2014 16:17:19		36/25/2014 16:17:19
36/26/2014 36:36:58	36/26	Customer	10012428	Blue Fun		People Fun	Ever contacting (24) 405-1-23	10012428	36/25/2014 16:17:12		36/25/2014 16:17:12
37/25/2014 12:12:16	36/25	Customer	10012428	Business House		High level	new office number please	42	16/01/2014 13:24:19		16/01/2014 13:24:19
37/25/2014 14:34:37	36/25	Customer	10012428	Clarence George		High level	Describe with Owner's name	42	30/10/2014 13:25:52		30/10/2014 13:25:52
36/19/2014 11:49:18	36/19	Customer	10012428	Water Hydrator		Passer not on the 272	gphgph		12/11/2014 13:25:22	Neil MacCrack	12/11/2014 13:25:22
36/20/2014 13:44:37	36/20	Global	10012428	Long Contract		Water			36/25/2014 09:53:04		36/25/2014 09:53:04
36/25/2014 36:32:40	36/25	Dealer	10012428	QR Encoder		Water Encoder	Testing 123	42	36/25/2014 09:53:04		36/25/2014 09:53:04
36/25/2014 10:27:22	36/25	Customer	10012428	Yarnall Account		Contract One	lighting	42	36/25/2014 10:26:36		36/25/2014 10:26:36

3. Select the Maintenance Issue that you previously saved and closed as shown in the following screenshot:



4. Click “Reopen Selected” as shown in the following screenshot:



Result: The “Yes/No” window displays as shown in the following screenshot:



5. 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 Existing Maintenance Issues 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:

Logbook #	Date	Type	Customer ID	Name	Person ID	Name	Description	Notes	Last Action	Technician	Create New
36/05/2014 11:50:36	36/5/2014	Customer	10011217	Blue International		Contract	new issue	new notes	36/05/2014 11:50:36		Create New
36/07/2014 14:36:59	36/5/2014	Customer	10434268	Northall gas fitting		Gas Fitting	not		36/07/2014 14:36:59		Create New
36/01/2014 14:14:37	36/5/2014	Customer	81187104	Blue Fuel		Gas Fitting	Ever contacting (24) 405 1 521	10/04/2014	36/01/2014 14:14:37		Create New
36/05/2014 16:36:59	36/5/2014	Customer	81187104	Blue Fuel		Gas Fitting	Ever contacting (24) 405 1 521	10/04/2014	36/05/2014 16:36:59		Create New
37/05/2014 12:12:16	36/5/2014	Customer	81094182	Essex House		High Voltage	new office number please	42	16/05/2014 12:12:16		Create New
37/05/2014 14:36:57	36/5/2014	Customer	11429438	Clarence Garage			Search in with (owner's) name to	owner	30/05/2014 13:57:52		Create New
36/19/2014 11:49:18	36/5/2014	Customer	10158411	Water Hydrant		Person not on file 11772	gphgph		12/11/2014 11:49:18	Neil MacCrack	Create New
36/05/2014 11:44:37	36/5/2014	Global	10011	King London		Water Hydrant	not		12/11/2014 11:44:37	Neil MacCrack	Create New
36/05/2014 09:52:40	36/5/2014	Dealer	10018088	QR Encoder		Water Hydrant	testing 123	gphgph	30/05/2014 09:52:40		Create New
36/05/2014 10:37:22	36/5/2014	Customer	10018088	Yarnall Account		Contract One	lighting	gphgph	30/05/2014 10:37:22		Create New

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:

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 Issue from the “User” dropdown list as shown in the following screenshot:

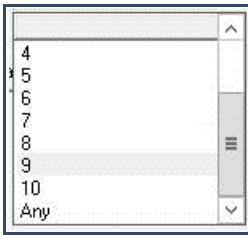
ID	Name
1	User A
1973	Doug M
2	Odin
3	Tom
4	User C
AMYC	Amy Condon
BLAH	a

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 being 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 are displayed as shown in the following screenshot:

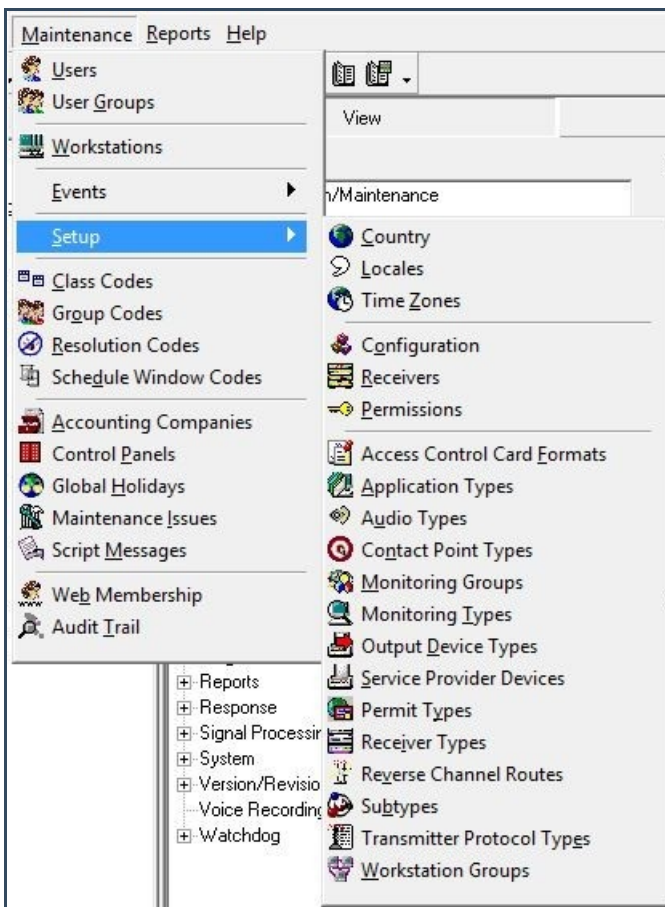
Logged	User ID	Type	Contact ID	Name	Person ID	Name	Description	Status	Last Action	Technician
10/25/2014 11:44:37	8030	Order	4047	Ang Corbett			Serial	Open	10/25/2014 12:28:22	Nial MacDonald
10/25/2014 11:22:11	8030	Customer	803ANCE	Revenue House			Push Pin	Closed	10/25/2014 11:30:09	Nial MacDonald
10/25/2014 11:34:38	8030	Customer	1111	Group			Test Issue	Closed	10/25/2014 10:16:29	Nial MacDonald
10/25/2014 10:10:03	8030	Customer	1742607	Teaching and account			reorderable_grouping_group	Resolved	10/25/2014 10:10:22	Nial MacDonald
10/25/2014 10:40:45	8030	Customer	1187	Group Test			Abad battery	Ready Abad battery	10/25/2014 11:10:56	Nial MacDonald

Note: In the search results above, the user searched for all Maintenance Issues associated with technician “Nial MacDonald”.

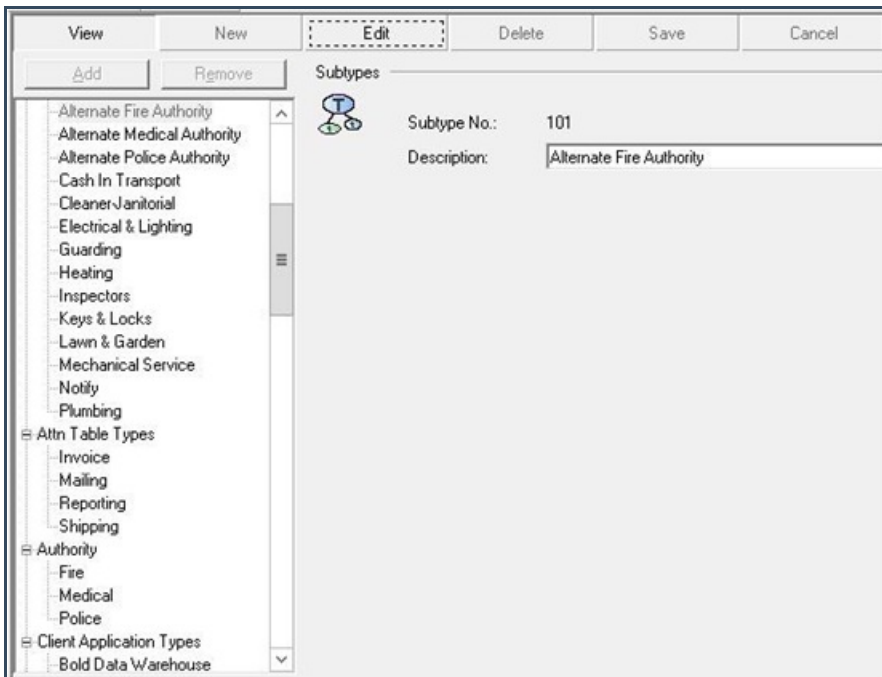
Adding a Service Type

Perform the following steps to add a Service Type in the Manitou Supervisor Workstation:

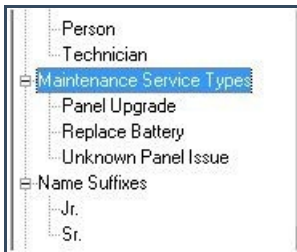
1. Open the Manitou Supervisor Workstation.
2. Navigate to the “Maintenance” menu, then click “Setup” and “Subtypes” as shown in the following screenshot:



Result: The “Subtypes” window displays as shown in the following screenshot:

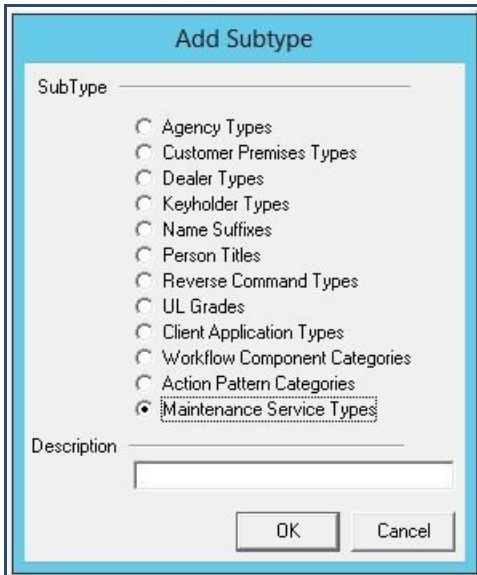


3. Scroll down and select the “Maintenance Service Types” option as shown in the following screenshot:



4. Click “Edit” then click “Add”.

Result: The “Add Subtype” window displays as shown in the following screenshot:



5. Enter a description into the “Description” field then click “OK”.

6. The Maintenance Service Type you added now displays on the “Subtypes” form as shown in the following screenshot:



7. Click “Save”.

Sending a Script Message for a New Maintenance Issue

Manitou has the option to create and send Script Messages to technicians when new or updated Maintenance Issues are assigned to them.

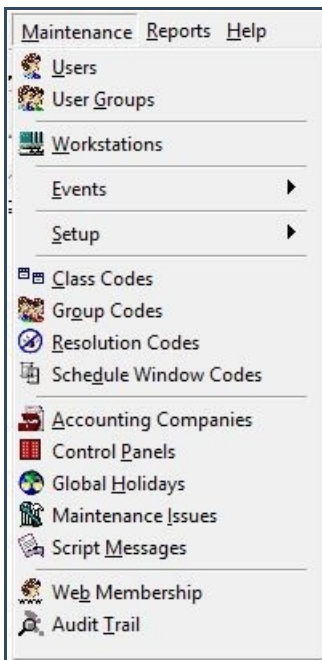
After you complete the instructions in this document, the following conditions still must be met for the system to send the notification email, as described:

- The technician to whom you want to send the email must be the designated technician on the Maintenance Issue form.

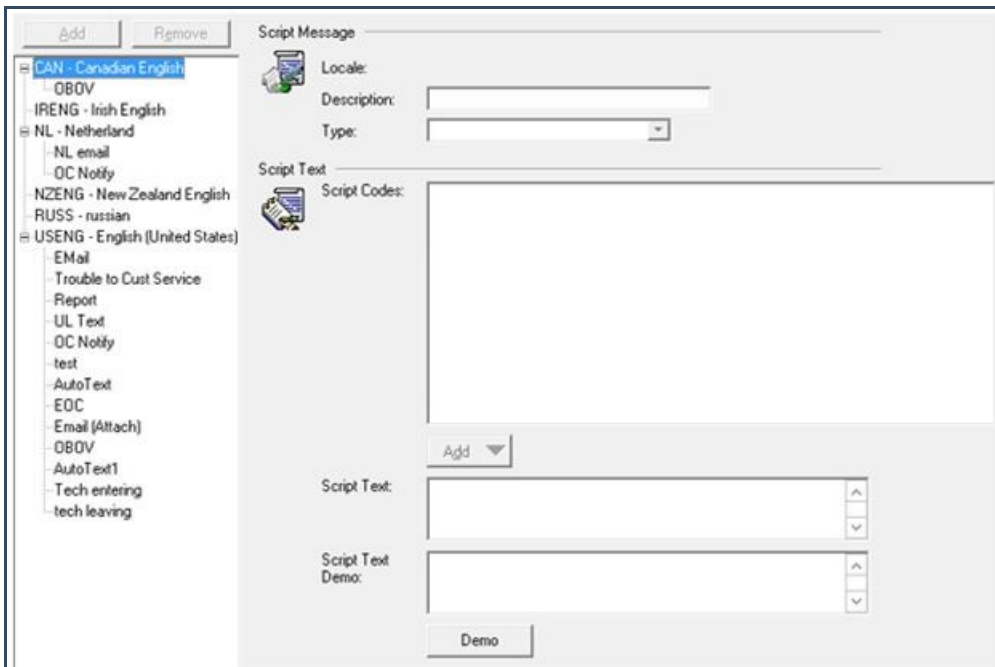
- The technician to whom you want to send the email must have an email address listed in the Monitoring Company Contact List.
- The Report Publisher must be running and properly configured to send emails.

Perform the following steps to send a script message to notify a technician about a new Maintenance Issue via Script Message:

1. Open the Manitou Supervisor Workstation.
2. Navigate to the “Maintenance” menu and select “Script Messages” as shown in the following screenshot:



Result: The “Script Message” window displays as shown in the following screenshot:



3. Click "Edit" then "Add".

Result: The "Add Script Message" window displays as shown in the following screenshot:



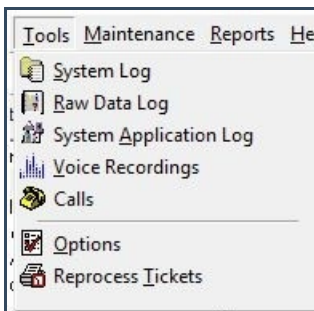
4. Enter a description into the "Description:" field.
5. Select a locale for your script message from the "Language:" dropdown menu as shown in the following screenshot:

Language	Description
CAN	Canadian English
IRENG	Irish English
NL	Netherland
NZENG	New Zealand English
RUSS	russian
USENG	English (United States)

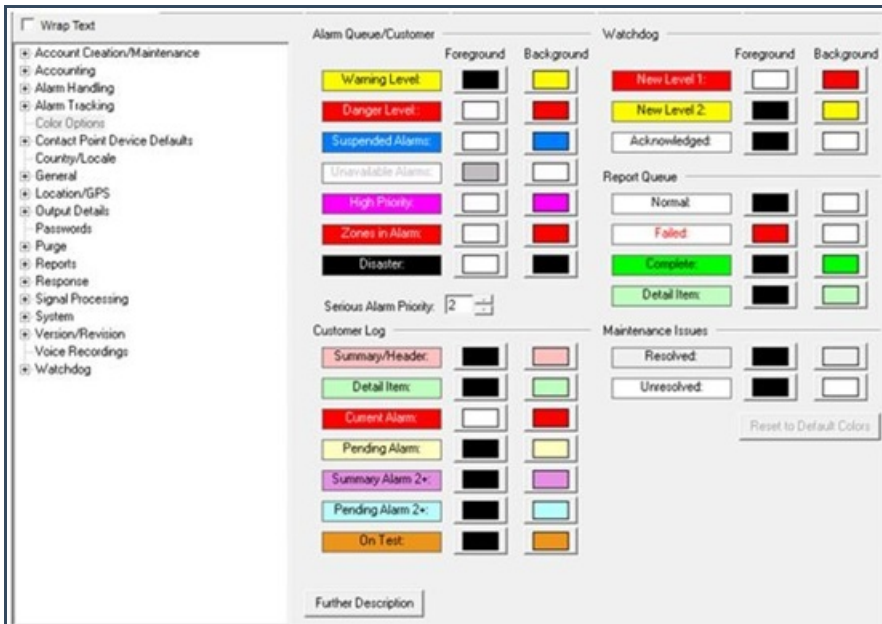
6. Select the "Email" option from the "Type:" dropdown menu as shown in the following screenshot:



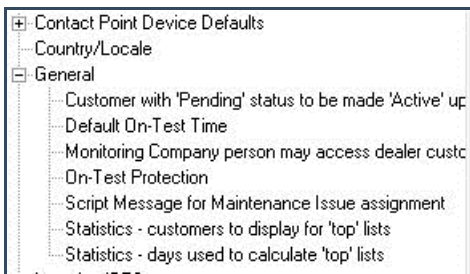
7. Enter the text you want to use for the script message into the "Script Text:" field.
8. Click "Save".
9. Navigate to the "Tools" menu and select "Options" as shown in the following screenshot:



Result: The following form displays:



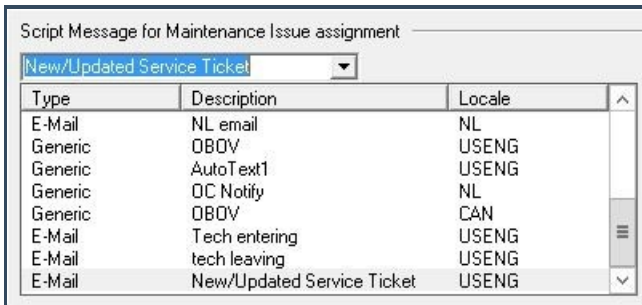
10. Expand the “General” node in the Navigation Tree as shown in the following screenshot:



11. Select the “Script Message for Maintenance Issue Assignment” option.

12. Click “Edit”.

13. Select the script message you recently added from the dropdown menu as shown in the following screenshot:



14. Click “Save”.