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:

| 87 | 5 | | | | | | | | | | | | |
|-----|--------------------|---------|----------|----------------|-----------------|--------|--------------------------|---------------------------------|--|---------------------|--------------|---|-------------|
| 16 | agent in | Uar D | 1,04 | Cantalit | Nate | Pana 0 | Nana | Description | Autor | Lad Arlion | Technisian | • | Deate New |
| 10 | 5-05-0014 11-01 38 | 40.5 | Custome | Apr(1/57 | Em Alexandry | | Contract | And in the | rates tubes | 05-05-2014 11 51 58 | | _ | |
| 1e | 5/27/2014 14 (6:58 | 804.0 | Curkonee | THUNDER | Survey gettiday | | | ad | | 05/07/0014 14 34 18 | | _ | E a Service |
| 16 | 5/07/0814141437 | 801.0 | Culture | BLUEPEN | Due Fuh | | Puple Fah | Env pertaking (NI) 465-1321 | SCALADO! | 06/25/2014 10:17 19 | | _ | |
| 16 | 6-26/2014 (6.35-55 | 801.5 | Customer | BURFON | Dia Fut. | | Pupie Full | Ever contracting (202) 405-1121 | 54/5450 | 06/05/0014 10:1712 | | | |
| 16 | F/05/0014121216 | 0.0-68 | Customer | BOUNCE | Energy House | | High Wind | new office mether please | 1 | 10/01/2014 13:04 19 | | | |
| 16 | 7/21-2214 14 34 37 | DURUSE. | Customer | OLAPENOS | Carerice Cargle | | | Need to add Clarence's mon-to- | nation | 05/16/2014 13/57/57 | | | |
|]0 | 6/15/2014 11 40:16 | 80x3 | Cummer | which which he | Wate Hydraton | | Person not on the (13/2) | papap | 1. | | | _ | |
| Ta | 6/05/0014134437 | 801.5 | Gold | 49011 | Any Candorf | | | terold | 90 | 10/01/0814 12 28 22 | Not Marchael | _ | |
| 16 | 6/25/2014 00 52-48 | DEALER | Dealer | 01,90001 | Of Dealer | | Buildhalt Dauder | testing 123 | diated | 06/05/0274 09/52/04 | | | |
| 116 | 8/25/2014 10 37 22 | 401.5 | Castoree | 1000PM | Variety Account | | Contract One | hightig | del-d-de | 08/25/2014 10:38 38 | | | |

3. Double-click the Maintenance Issue you want to view.

Result: The "View Maintenance Issue" window displays as shown in the following screenshot:

| Contact type | Customer | Contact ID: | 1111 | 9 |
|--|--------------------|-----------------|---------------------|----------|
| Name: | Doug | Technician: | Nial MacDnald | * |
| Person: | | Tech On Site | Γ | |
| Priority: | 4 | Appt Date: | 10/21/2014 - 6 | :00:00 F |
| Issue: | 117 | Service Type | Panel Upgrade | - |
| Logged: | 10/06/2014 13:34:0 | 18 Last Action: | 10/21/2014 10:16:31 | |
| User: | MEL | | | |
| 0.001. | MEE | Resolved: | 10/21/2014 10:16:31 | |
| Description: Test Issue | 19 6 6 | Hesolved: | 10/21/2014 10:16:31 | |
| Description: | | Hesolved: | 10/21/2014 10:16:31 | |
| Description: Test Issue Notes: edfsdfsd | 6/2014 13:34:16 | Hesolved: | 10/21/2014 10:16:31 | |
| Description: Test Issue Notes: edfsdfsd | | Hesolved: | 10/21/2014 10:16:31 | |
| Description: Test Issue Notes: edfsdfsd MEL - 10/0 sadsadsa | | | | |

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:



| 3 | | | | | | | | | | | | |
|--|---------|----------|---------------|-------------------|---------|--------------------------|--------------------------------|--------------|---------------------|-------------|---|-----------|
| Logentie | Uar D | 1,pe | Cantantill | Nate | Perce 0 | Nana | Description | Autor | Lad Arlian | Technisian | • | Casta New |
| 05.495/2014 11 41 30 | 40.5 | Custome | ALC: 104 | Em Alexandry | | Castant | And in the | rates tubes | 05-05-2014 11 51 58 | | - | |
| 05/27/2014 14 06 58 | 804.0 | Curkonee | THUNDER | Survey at Survey | | | ad | | 05/07/0014 14 34 18 | | | 20.0000 |
| 165-07-0814141437 | 8010 | Cuttone | BLUEPEN | DueFuh | | Pupe Fah | Env pertaking (NI) 465-1321 | SCALADO | 06/25/2014 10:17 19 | | | |
| 05-25/3014 06 39-59 | 801.5 | Customer | RUKFON | Defut | | Pugie Fut | Ever contacting (20%) 405-1121 | 54/0450 | 06/05/08/4 10/17 12 | | | |
| 85/05/0014121216 | 0.0.45 | Customer | BOUNCE. | Energy House | | High Wind | new office number, please | - | 10/01/2014 13:04 19 | | | |
| 07/01/0014 14 34 37 | DURWEB. | Customer | OLAPENOS | Carerce Cargle | | | Need to add Clarence's mon-to- | nation | 05/16/2014 13/57/57 | | | |
| 06/15/2014 11 48 16 | | Customer | and date into | Water Hydraton | | Person not on the (1373) | popula | | | | _ | |
| 05/05/0014 13 44 37 | 801.0 | Gold | 490.0 | Any Candrol | | | incld | dia Marina | 10/01/08/4 12 29 22 | Nat Machael | - | |
| 05/25/2014 00 52-40 | DEALER | Dealer | 0,4001 | Of Dealer | | Buildhalt Douales | testing 123 | diado | 06/05/0274 09/52/04 | | | |
| 06/25/2014 10 37 22 | 40.5 | Curtana | COMPANY. | Variation Account | | Contract Gree | hightig | dif-di-di-de | 08/25/2014 10:38 38 | | | |

3. Click "Create New" as shown in the following screenshot:

Create New

Result: The "New Maintenance Issue" window displays as shown in the following screenshot:

| | New Main | tenance Issue | |
|---|---------------------------------------|--|---------------------|
| Contact type: Name: | · · | Technician: Tech On Site | |
| Priority: Issue: Logged: User: | 0 0 10/29/2014 14:37:28 BOLD | Appt Date: Service Type: Last Action: Resolved: | ↓ 12:00:00 AM ÷ |
| Description: | | | <u>^</u> |
| | | | Save Changes Cancel |

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

| Company | 10 N |
|------------------|------|
| 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:



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

| 2 | Contact type: | Company 💌 |] | |
|----|---------------|------------------------|-------------|--|
| 20 | Name: | Not so Central Station | Technician: | |

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:

| 3 | Contact type: | Customer 💌 | Contact ID: | 1973 | ٩ | |
|---|---------------|---------------------|---------------|-------------------|-------|--|
| 3 | Name: | Doug Test | Technician: | Nial MacDnald | - | |
| | Person: | - | Tech On Site | v | | |
| | 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 | | | | 2 | |
| | | | | | | |

13. Click "Save Changes".

Result: The Maintenance Issue you created is displayed in the list as shown in the following screenshot:

0/2022/19.415 (0.12) (Latere 1922) (Latere 1922) (Latere 1922) (Latere 1922)

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:



| 1 m | | | | | | | | | | | | |
|---|----------|-----------|----------------|--------------------|----------|-----------------------|---------------------------------|---------------|---------------------|--------------|------|-----------------|
| Laged | Use D | Tate | Caritant D | No. | PercentO | Nate | Description | Notes | LatArtie | Technica | •] | Carata New |
| (0.05/0014 11 07 38 | 80.5 | Customer | MAL-CLOT | Ban Alashafiy | | Contract | Index linear | rates ratios | 05-06-0014 15 51 58 | | - | |
| 05/07/001414-08/58 | | Cutores | THUNDER | Roberg galledarg | | | ** | | 05/07/0014 14 24 18 | | - | 1 E. H. Datasia |
| 165-07-0814 14 14 37 | 80.5 | Curturest | BLUEPEN | Bala | | Pupe Fah | Ever certacting (202) 465-1329 | SCAPAGO . | 06/25/2014 1817 19 | | | |
| 05-28-2014 (6.19-59 | #01.0 | Customer | BLUEPSH | the Feb | | Puple Fah. | Even contacting (207) 405-1325 | 54/0400 | 06/05/08/4 18/17/12 | | | |
| 87/25/2814 Q Q H | DUR-ES | Customer | \$0.NO | English Name | | High-Ward | new office number pieces | 14 | 16/01/2014 13:04 19 | | - 17 | |
| 07/21/2014 14 34 37 | D. Pulla | Cuttorian | GARENCE | Carence Cirigle | | - | Need to add Classical's root to | -sales | 05/16/0014 12/07/07 | | | |
| 06/15/2014 11 48:16 | | Curtonee | W-DRATE | Water Hydraton | | Percent on the (1972) | pepep | | | | _ | |
| 00/25/2014 13 44 37 | | Ginbal | 480115 | Any Candel | | | teroted | 44 | 10/21/2014 12:29:32 | Not MacDrokt | _ | |
| 05/25/2014 09:52:40 | DEALER | Dealer | 01,74887 | Of Dealer | | Boldbart Dealer | leading 123 | distantiki | 06/05/0014 05/52 04 | | | |
| 06/25/2014 10:37 22 | 801.0 | Customer | 10000 | Vanish Accord | | Contact Dree | haing | deluted and a | 06/05/0014 10 30 36 | | | |

3. Select the Maintenance Issue you want to edit on the grid as shown in the following screenshot:

| Logentia | Uwb | 1,64 | Contait® | Nane | Pariste ID | Name | Description | Notes | LatAction | Technician |
|------------------------------------|----------|---------|----------|---------------|------------|------|--------------------------|-------|---------------------|--------------|
| Loggerf & 10-101-001-4 14 SEION | Signed A | Catoren | 101 | the local day | | | DIVSTEM GENERATED (Video | idard | 15/04/0014 15 00:02 | Central Tech |
| TRANSPORT AND ADDRESS | | | | | | | | | | No. Watches |

4. Click "Edit Selected" as shown in the following screenshot:



Result: The "Edit Maintenance Issue" window displays as shown in the following screenshot:

| | | | tenance Issue | | |
|---|---------------|---------------------|---------------|-----------------|---------------|
| | Contact type: | Customer 🔄 | Contact ID: | 1973 | 9 |
| C | Name: | Doug Test | Technician: | Nial MacDnald | • |
| | Person: | × | Tech On Site | v | |
| | 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 | | | | ^ |
| | | | | | v |
| | Notes: | | | | ~ |
| | Notes: | | | | < < |
| | Notes: | | | | v |
| | | | | | × |
| | | | | | × |

- 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:

[9] (9) (9) 4 (6 (6 (6))) [current [10]] [big[fer]] [big[fer]

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 Maint | tenance Issue | |
|--|--|--|---|
| Contact type: Name: Person: Priority: Issue: Logged: User: Description: dead battery | Customer Doug Test 3 106559 10/29/2014 15:48:45 BOLD | Contact ID: Technician: Tech On Site Appt Date: Service Type: Last Action: Resolved: | 1973 Nial MacDnald Image: Constraint of the second seco |
| Notes: | | | × |
| | | | |
| New Neter | | | × |
| New Notes: really dead batt | enyl | | ~ |
| | ety | _ | |

8. 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:

 10/3/0143832
 Overlage
 10/2/014263
 10/2/014263

 10/2/0143646
 2000
 Context
 10/2/014263

 10/2/0143646
 2000
 Context
 10/2/014263

 10/2/0143646
 2000
 Context
 10/2/0142633

 10/2/014364
 2000
 Context
 10/2/0142633

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.

| 3 | Contact type: | Customer | Contact ID: | 1973 | 1 | | | | | |
|---|--|--|---|---------------------|-------|--|--|--|--|--|
| Ø | Name: | Doug Test | Technician: | Nial MacDnald | 3 | | | | | |
| | Person: | | Tech On Site | | | | | | | |
| | Priority: | 3 | Appt Date: | 10/29/2014 - 9:00:0 | MA 00 | | | | | |
| | Issue: | 106559 | Service Type: | Replace Battery ~ | 1 | | | | | |
| | Logged: | 10/29/2014 15:48:45 | Last Action: | 10/31/2014 10:51:20 | 6.01 | | | | | |
| | User: | BOLD | Resolved: | 10/31/2014 10:51:20 | | | | | | |
| | Description: | | | | | | | | | |
| | Notes: | | | | | | | | | |
| | 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 | | | | | | | | | |
| | | ought the battery back to life /2014 10:51:20 | for a small fee, of o | course. | | | | | | |

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:



| N. | | | | | | | | | | | | |
|---------------------------------------|---------|----------|----------------|------------------|---------|--------------------------|--------------------------------|--------------|---------------------|------------|------|---------------|
| Lagentin | Uar D | 1 tore | Cantali | Nate | Panar D | Nana | Description | Autor | Lad Arlion | Technisian | • | Casta New |
| 05495/00141110138 | 40.5 | Custome | 400-53-557 | Em Alexandry | | Castant | And in the | rates tubes | 05-05-0014 11 51 54 | | - | |
| 05/27/2014 14 (6:58 | 804.0 | Curkonee | THUNDER | Survey at Survey | | | ad | | 05-01-0014 14.34 18 | | | E de Damardas |
| 165-07-0814 14 14 37 | 8012 | Cuttone | BLUEPEN | Darfuh | | Pupe Fuh | Env pertaking (NI) 465-1321 | Statutor | 06/25/2014 10:17 19 | | | |
| | 801.5 | Customer | RUEFER | Dia Fut. | | Pugie Fult | Ever contacting (207) 405-1321 | 54/5450 | 06/05/0014 10:1712 | | | |
| 87/05/0014121216 | 0.0-50 | Customer | BOUNCE. | Energy House | | High Wind | new office market please | 1 | 10/01/2014 13:04 19 | | | |
| 07/01/0014 14 34 37 | DURUSE. | Customer | OLAPENCE. | Carerce Cargie | | | Need to add Clarence's mon-to- | nation | 05/16/2014 13/57/57 | | | |
| 06/15/2014 11 40-16 | 804.0 | Customer | which which he | Wate Hydraton | | Person not on the (1372) | papap | | | | - 12 | |
| 05/05/0314 13 44 37 | 801.5 | Gold | 4941-1 | Any Condorf | | | inerital | 10 | 10/05/0814 12:09:02 | Nathadrat | - | |
| 05/25/2014 01 52 48 | DEALER | Dealer | 01,90009 | Of Dealer | | Buildhalt Dauder | testing 123 | diated | 06/05/0274 09/52/54 | | | |
| 06/25/3814 10 37 22 | 801.5 | Custome | COMPLEX. | Variesh Accessed | | Contract One | hatta | dif-di-di-la | 46/25/2014 10 39 38 | | | |

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

10/20/2011/10/05 80:00 Calanaes 10/3 DougTest devaluations and devaluations 10/20/2011/30/20

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 | Mainte | enance Issue | | |
|----|--|---|----------|-------------------|-----------------------|-----------|
| C, | Contact type: | Customer | ¥ | Contact ID: | 1973 | 9 |
| 0 | Name: | Doug Test | | Technician: | Nial MacDnald | - |
| | Person: | | * | Tech On Site | ସ | |
| | 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 | | | | | 1 |
| | | | | | | |
| | Notes | | | | | |
| | Notes: | ien | | | | |
| | really dead batt | a construction of the later | 30/14.09 | PDP-00-6M1 to 110 | 1/20/14 02:00:00 AM1 | |
| | really dead batt | a construction of the later | 30/14 09 | :00:00 AM] to [10 | 1/30/14 03:00:00 AM]. | × |
| | really dead batt - Appointment da BOLD - 10/30 | ate changed from [10/ | | :00:00 AM] to [10 | //30/14 03:00:00 AM]. | |
| | really dead batt - Appointment du BOLD - 10/30 battery is not re | ate changed from [10/ /2014 17:17:18 | | :00:00 AM] to [10 | //30/14 03:00:00 AM]. | |
| | really dead batt - Appointment da BOLD - 10/30 | ate changed from [10/ /2014 17:17:18 | | :00:00 AM] to [10 | //30/14 03:00:00 AM]. | |
| | really dead batt - Appointment du BOLD - 10/30 battery is not re | ate changed from [10/ /2014 17:17:18 | | :00:00 AM] to [10 | //30/14 03:00:00 AM]. | |
| | really dead batt - Appointment du BOLD - 10/30 battery is not re | ate changed from [10/ /2014 17:17:18 | | :00:00 AM] to [10 | 1/30/14 03:00:00 AM]. | |
| | really dead batt - Appointment du BOLD - 10/30 battery is not re | ate changed from [10/ /2014 17:17:18 | | :00:00 AM] to [10 | //30/14 03:00:00 AM]. | |

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:



| 10.0 | 22 | | | | | | | | | | | | |
|------|----------------------|---------|----------|-------------|-----------------------|---------|--------------------------|---------------------------------|--------------|----------------------|-------------|---|-----------|
| | Logentim | Uur D | 1,04 | Cantali | Nate | Panar D | Name | Description | Autor | Latition | Technisian | • | Casta New |
| 61 | 05-05-0014 11-01 30 | 40.5 | Custome | 10.01-10.01 | Ban Manualty | | Contact | ages long | rates radius | 05-09-0014 11 51 54 | | - | |
| | 05/07/0014 14 06:58 | 804.0 | Curkotee | THUNDER | Statute get Statute | | | ad | | 05-01-0014 14.34 18 | | | 20.0000 |
| | 05-17-1814 14 14 37 | #0.5 | Cutore | BLUDPEN | Due Fuh | | Puper Fah | Env pertaking (NI) 465-1321 | Statuto! | 06/25/2014 10:17 19 | | | |
| 1 | 05-25-2014 06 39-59 | 80.5 | Customer | BUEFER | Bue Fut. | | Public Full | Ever contracting (202) 405-1321 | SAFDASD | 06/05/0014 10:1712 | | | |
| | 87-05-0014121216 | 0,0-68 | Customer | BOUNCE | Barris Have | | High Wind | new office mether please | 1 | 10/01/2014 13:04 19 | | | |
| п | \$7/04.0014 14 34 37 | DURWER. | Customer | O, APENOS | Carerce Cargie | | | Need to add Owence's mon-to- | ratio | 05/16/2014 13/57/57 | | | |
| | 06/15/2014 11 45 16 | 80.5 | Customer | an distance | Water Hydratum | | Person not on the (1372) | popula | | | | - | |
| | 05/05/0014134437 | 80.5 | Good | 490-7 | Any Candorf | | | inerital | 10 | 10/01/0814 12 29 22 | Nat Machael | _ | |
| | 05/25/2014 2012 40 | DEALER | Dealer | 0,4001 | Of Dealer | | Bubbat Dealer | testing 123 | diado | 00/05/0014 00/52 04 | | | |
| -1 | 08/25/2014 10 37 22 | 401.5 | Custome | COMPLEX. | Variety), Account | | Contract-One | hatta | dif-didate | 100/05/0014 10:30 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 C Logged Date C Last Action Date C Appointment Date C Resolved Date Date From: 05/01/2014 _ 00:00:00 - Date To: 10/31/2014 _ 23:59:59 - | Contact Types | < III > |
|--|--|---------|
| Resolution | | |
| C Unresolved C Resolved © Both User User ID: | Contact ID From: Contact ID From: Contact ID To: | |
| Technicians | Technician On Site: | _ |
| Nial MacDnald Bil Centual Tech Global Keyholder #1 | Service Type: Panel Upgrade | - |
| Unassigned | 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 Issue from the "User" dropdown list as shown in the following screenshot:

| ID | Name | ^ |
|------|------------|---|
| | | Ξ |
| 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:

| There | |
|-------|-----------------|
| | Panel Upgrade |
| | Replace Battery |
| | Unknown Pan |
| 30 | |

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:

| 1 | | | | | | | | | | |
|---------------------|-------|----------|-----------|----------------------|---------|--------|------------------------------|------------------|--|--------------|
| Laget * | Use D | Tree | Contactio | Name | Penan D | Name | Ownighten | Sider | LastAction | Technician |
| 06/20/2014 13 44 37 | 801.0 | Global | AM017 | Any Conduct | | | tworld | ## | 10/05/0814 12 29 22 | National |
| 10/01/2014 13 22 11 | BOLD | Customer | BOUNCE | Bource House | | Put Pa | 4-804 | -0-0640 | 10/25/2014 13 30 09 | Nat MacDrukt |
| | | Customer | 11111 | Deag | | | Testing | 4-9-39 #8-8-4 | 10/21/2014 10 16 21 | National |
| 10/06/2014 13 34:00 | MD. | | | | | | | | | |
| 10/06/2014 13:34:00 | 80.0 | Customer | Pulluki | Twohalaptent account | | | anderderis praethe photophop | Paul-ad | 10/06/2014 16 10.22 10/01/2014 13 10:56 | Na HarDrold |

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:

| View | New | | Edit | | Del | lete | Save | Cancel |
|--|-----------|---|----------|----------|------|---------|-------------------|--------|
| Add | Remove | | Subtypes | | | | | 1.7) |
| -Alternate Fire Au -Alternate Medic | | ^ | R | Subtype | No.: | 101 | | |
| -Alternate Police -Cash In Transpo -Cleaner Janitoria | Authority | | | Descript | ion: | Alterna | te Fire Authority | |
| Electrical & Ligh Guarding Heating Inspectors | | = | | | | | | |
| -Keys & Locks -Lawn & Garden -Mechanical Ser -Notify -Plumbing | | | | | | | | |
| B Attn Table Types -Invoice -Maĭing | | | | | | | | |
| Reporting | | | | | | | | |
| Authority Fire Medical Police | | | | | | | | |
| ■ Client Application T Bold Data Ware | | ~ | | | | | | |

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:

| | Add Subtype |
|-------------|---|
| SubType - | |
| | C Agency Types |
| | C Customer Premises Types |
| | C Dealer Types |
| | Keyholder Types |
| | Name Suffixes |
| | Person Titles |
| | C Reverse Command Types |
| | C UL Grades |
| | C Client Application Types |
| | C Workflow Component Categories |
| | C Action Pattern Categories |
| | Maintenance Service Types |
| Description | |
| | r |
| | 1 |
| | OK Cancel |
| | |

- 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:

| Subtypes | | | |
|----------|--------------|--------------------|--|
| R | Subtype No.: | 103 | |
| | Description: | Camera Malfunction | |

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:

| Add Remove | Script Message | | |
|---|----------------------|---------------------------------------|---|
| B CAN - Canadian Eriglish | Locale: | | |
| OBOV | Description: | | |
| -IRENG - Irish English R NL - Netherland | Type: | · · | |
| -NL email | | | |
| OC Notify | Script Text | | _ |
| -NZENG - New Zealand English -RUSS - russian | Script Codes: | | |
| USENG - English (United States) | 1000 | | |
| EMail | | | |
| Trouble to Cust Service Report | | | |
| -UL Text | | | |
| - OC Notify | | | |
| -test -AutoText | | | |
| EOC | | | |
| Email (Attach) | | 1 | |
| OBOV AutoText1 | | Add 🐨 | |
| Tech entering | Script Text: | | |
| tech leaving | | | |
| | | · · · · · · · · · · · · · · · · · · · | |
| | Script Text Demo: | × | |
| | | | |
| | | Demo | |

3. Click "Edit" then "Add".

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

| Description: | |
|--------------|----------------------|
| Language: | Canadian English 📃 💌 |
| Туре: | |

- 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:

| E-Mail | - |
|---------------|----|
| Generic | 10 |
| Pager Fax | |
| Fax | |
| E-Mail | |
| PBX Assistant | |

- 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:

| T Wrap Text | Alarm Queue/Customer | - 0.000 | | Watchdog | | 12203330 |
|--|-------------------------|------------|------------|----------------------|------------|----------------|
| Account Creation/Maintenance Accounting | Sector Sector Sector | Foreground | Background | | Foreground | Background |
| Alarm Handling | Warning Level | | | New Level 1: | | |
| Alarm Tracking | Danger Level: | | | New Level 2 | | |
| Color Options | | | | | | |
| Contact Point Device Defaults Country/Locale | Suspended Alarms | | | Acknowledged | | |
| General | Unavailable Alama: | | | Report Queue | | |
| Location/GPS | High Priority | | | Nomat | | |
| Output Details | | | | | | |
| Passwords Purpe | Zones in Alarm | | | Failed | | |
| Reports | Disaster: | | | Complete: | | |
| Response | | | _ | | | |
| Signal Processing | Serious Alarm Priority: | 2 - | | Detail Item: | | |
| System Version/Revision | Customer Log | | | Maintenance Issues - | | |
| Voice Recordings | Summary/Header: | 1 | | Resolved | 1 | |
| Watchdog | | | | | | |
| | Detail Item: | | | Unresolved: | | |
| | Current Alarm: | | | | Denation D | efault Colors |
| | Pending Alarm: | | | | Hepet to D | rerault Lolors |
| | | | | | | |
| | Summary Alarm 2+: | | | | | |
| | Pending Alarm 2+: | | | | | |
| | | | | | | |
| | On Test | | | | | |
| | | | | | | |
| | Further Description | | | | | |
| | Further Description | | | | | |

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:

| New/Updated Service Ticket | | | | | |
|----------------------------|----------------------------|--------|-----|--|--|
| Туре | Description | Locale | ^ | | |
| E-Mail | NL email | NL | | | |
| Generic | OBOV | USENG | | | |
| Generic | AutoText1 | USENG | | | |
| Generic | OC Notify | NL | 100 | | |
| Generic | OBOV | CAN | | | |
| E-Mail | Tech entering | USENG | = | | |
| E-Mail | tech leaving | USENG | | | |
| E-Mail | New/Updated Service Ticket | USENG | ~ | | |

14. Click "Save".