Manitou Training Agenda (Local Servers)

Manitou Web Client training is three days broken out into a variety of subjects. We recommend all Manitou users attend the appropriate topic that pertains to their daily work. One of the benefits of using our cloud environment is that you don't need to worry about starting or stopping services, replication, failovers, or backups!

Administrative & Supervisory Training (Day 1 - approx. 8 hours)

MSM	• Starting/Stopping • Brief Description of failover process • Detailed Description of services running on Manitou Server

Other Icons on Server Desktop	• Manitou Workstation (red icon)
	   o No Longer Used – Web Client is used in its place
	• Supervisor Workstation
	   o More Detail in the Next Section
	• FEP Commander
	   o Viewing Status of Receiver Connections
	   o Starting/Stopping Connections to Individual Receivers
	   o Starting/Stopping Connections to ALL receivers using same driver
	• DB Manager
	   o Using DBManager to Check Replication Status
	   o Other Uses of DBManager
	      ▪ Database Upgrades
	      ▪ Health Checks
	• Bold License Client
	   o Used to renew licenses (typically every six months)
	   o Viewing Existing Licenses
	   o Requesting Updated Licenses when necessary
	• Distributer Commander
	   o Used to Send Updates to Servers/Clients
	   o All Machines Should Have the Same Patch Number
	   o Some Machines May Have Different Package Numbers

Supervisor Workstation	• Layout of screen
	   o Menu Bar
	   o Tool Bar
	   o Navigation Section
	      ▪ Current Section
	      ▪ Tabs at Bottom of Navigation Section
	         • Nav
	         • Notes
	         • IM
	• Create Users
	   o Three Required Sections
	      ▪ ID/Name
	      ▪ User Group (Profile Automatically Selected)
	      ▪ Password (Typed Twice)
	   o Permission Profiles
	   o Remainder of Security Restrictions Section
	   o High Priority/Low Priority Fields
	   o Alarm Queue Read Only Checkbox
	   o Allow IM Checkbox
	   o Password Change Interval
	   o Change at Next Logon Checkbox

	- o Locked Until Checkbox - o Languages - View Permission Profiles - o Example of Removing Delete Customer from Operator permissions - o Example of Fixing Administrator Add Programming - o Example of Fixing Administrator Add Customer User Defined - o Explanation That This Section Is Best Revisited After Training - View Tools > Options - o Password Section ▪ Complexity/Length ▪ Restrict Password Reuse ▪ Restricted Character Sets ▪ Automatic Lockout - o Alarm Handling Section ▪ Set Option for Ribbon Notifications to be required ▪ Set Option for Maximum of One Alarm ▪ Set Option for Auto-Dial Auto Dialer to No ▪ Discuss Alarm Handling Mode ▪ Discuss Alarm Queue Display Style ▪ Discuss Alarm Queue Event Color Scheme - o We will likely return to options
Manitou Web Client	- Brief Example of Alarm Operations - Use of Question Mark key for Keyboard Shortcuts
Manitou Event Codes	- Discussion of Event Maps - o Brief Discussion of Signal Processing Attributes - o Brief Discussion of Disaster Mode - Discussion of Event Categories - Changing Default Action Patterns
Manitou Web Client	- Monitoring Company record - o Action Patterns ▪ Set behaviors for G1-G6 - o Enhanced Action Patterns ▪ Different for G1 Residential/Commercial? ▪ Different for G6 Residential/Commercial? ▪ Different Action Pattern for Low Battery?
Supervisor Workstation	- Option to require comment at end of alarm - Option to require resolution code at end of alarm - Resolution Codes - Global Holidays - Reports - o Customer Activity Report - o Daily Signals Report - o Customer Masterfile Report - o User Statistics Report - o Report Templates - View Only Alarm Queue in SWS - Receivers Form - Raw Data Log - User Status - o Change Alarm Handling Mode - o Change Auto-get mode - Customer User Defined fields
DBManager 2	- Explanation/Setup of Transactional SQL Replication - Fail-over practice - Backups

Operations (Day 2 - approx. 8 hours)

Manitou Web Client	• Layout of screen
	• Look at Alarm Queue
	   o Note colors of alarms in Queue
	   o Note Priority/Age of Alarms in Queue
	   o Close Alarm Queue
	• Alarm Operations
	   o Alarm Handling
	      ▪ Customer Info
	      ▪ Dealer Info
	      ▪ Alarm Info
	         • Date Time
	         • Zone
	         • PointID
	      ▪ Customer Status
	         • Number of Alarms for this customer
	         • On Test Status
	         • Time Zone
	      ▪ If Other Alarms, Look At History
	         • Explanation of how to read history
	      ▪ Action Pattern
	      ▪ Handle this Alarm to completion
	   o Explanation of UL Alarm Handling Summary
	   o Handle Another Alarm
	      ▪ Repeat, Cust info, Dealer Info, Alarm Info, Customer Status
	      ▪ Show Tabs on Bottom
	         • Alarm Section
	         • Plans Section
	         • Schedule
	         • Comments Section
	         • Zone Status Screen
	         • User Defined Section

On Test	• Technician Calls
	   o Basic On Test
	   o Advanced On Test
	      ▪ Permanent
	      ▪ Recurring
	      ▪ Putting Individual Zones On Test
	      ▪ Putting Event Codes/Categories On Test
	• From Alarm Screen
	   o Important Question: DO YOU WANT TO PREFILL…?
	      ▪ Yes – Only Used to Put This Same Event On Test
	      ▪ No – Will Put Entire Customer On Test

Temporary Schedule	Temporary Schedule
	• Customer Calls in before closing Time
	   o Use of Operations > Temporary Schedule
	   o Use of Maintenance > Customer > O/C Schedule > Temporary
	• With Late to Close
	   o Use of Actions > Add Temporary Schedule

Pre-Cancel	Pre-Cancel • Explanation • Examples • Usage

Temporary Comments	• Use of Operations > Temporary Comment (rare) • Use of Alarm > Actions > Add Temporary Comment (more common) • Use of Maintenance > Customer > Comments (most common)

Customer Maintenance	• How to Open an Account
	   o Type Customer ID
	   o Search Using Customer Search
	   o Search Using Receiver Line/TXID
	   o Search Using Quick Load
	• Quick Overview of a Customer Account
	   o Include Customer Status Info on Right Side
	   o Include Details from Details Page
	      ▪ Name/Address
	      ▪ Site Phone
	      ▪ Dealer (If Any)
	      ▪ Authorities
	   o Include Systems > Areas/Zones
	      ▪ Reset Zone Dots to Red
	   o Include Contact List
	      ▪ Show Rearranging/Editing
	   o Include Activity Log

Data Entry (Day 3 - approx. 8 hours)

Manitou Web Client	• Layout of screen
	• Customer Maintenance
	    o How to Open an Account
	        • Simple Search Using Magnifying Glass
	        • Advanced Search

Data Entry	• Screens in Customer Account
	    o Details
	    o Systems (Including Subsections of Systems)
	    o Action Patterns
	    o GPS Tracking (If Applicable
	    o Monitoring Services
	    o Contact List
	    o General Schedules
	    o OC Schedules
	    o Activity Log
	    o Permits
	    o Comments
	    o User Defined Fields
	    o Plans
	    o Maintenance Issues
	    o Reports
	    o Reverse Send
	• New Customer Wizard
	    o Initial Setup
	    o Name & Address Node
	    o Contact Points Node
	    o Monitoring Details Node
	    o Systems Node
	        • Add System Wizard
	        • Add Transmitters
	        • Areas and Zones
	        • Programming
	    o Contacts Node
	    o Call Lists Node
	    o User Defined Fields Node

Data Entry for Dealer Accounts	• Data Entry for Dealer Accounts
	    o Details
	    o Contact Lists
	    o General Schedules
	    o Call Lists
	    o Transmitter Types
	    o Programming
	    o Comments
	    o User Defined Fields
	    o Billing
	    o Action Patterns
	    o Maintenance Issues
	    o Control Panels
	    o Reverse Protocols
	    o Reverse Commands
	    o Reports
	    o Statistics
	    o GPS Tracking
	• Data Entry for Authority Accounts

	- o Details - o Contact List - o Call Lists - o Comments - o General Schedules - o Maintenance Issues - Data Entry for Agency Accounts - o Details - o Contact List - o Call Lists - o Comments - o General Schedules - o Maintenance Issues - Data Entry for Branch Accounts - o How a Branch Differs from a Dealer - o Details - o Contact List - o Call Lists - o Comments - o General Schedules - o Reports - o Maintenance Issues - o Statistics - Data Entry for Global Keyholder (GKH) Accounts - o Discussion of When GKH Accounts Should be used - o Details - o Profile - o User Defined Fields - o General Schedules - o Maintenance Issues - Transmitter Types (TX Types) - o DFLT Type - o Other Types - o Programming Tab - Maintenance Issues - o Searching For Maintenance Issues - o Filtering the Maintenance Issues Screen - o Resolving Maintenance Issues - Audit Trail - o Default Screen - o Filtering the Audit Trail Screen - o Explanation of Color Coding