Action Plan Modules

Action Plan Modules have been added to enable commonly used series of action plan steps to be set up in a global library of modules that can be referenced in Action Plans. The Modules are set up as a "mini action plan" with a series of steps leading to outcomes that will snap back into the action plan. Using Modules reduces the number of steps in the action plan by combining similar branches of steps into one branch.
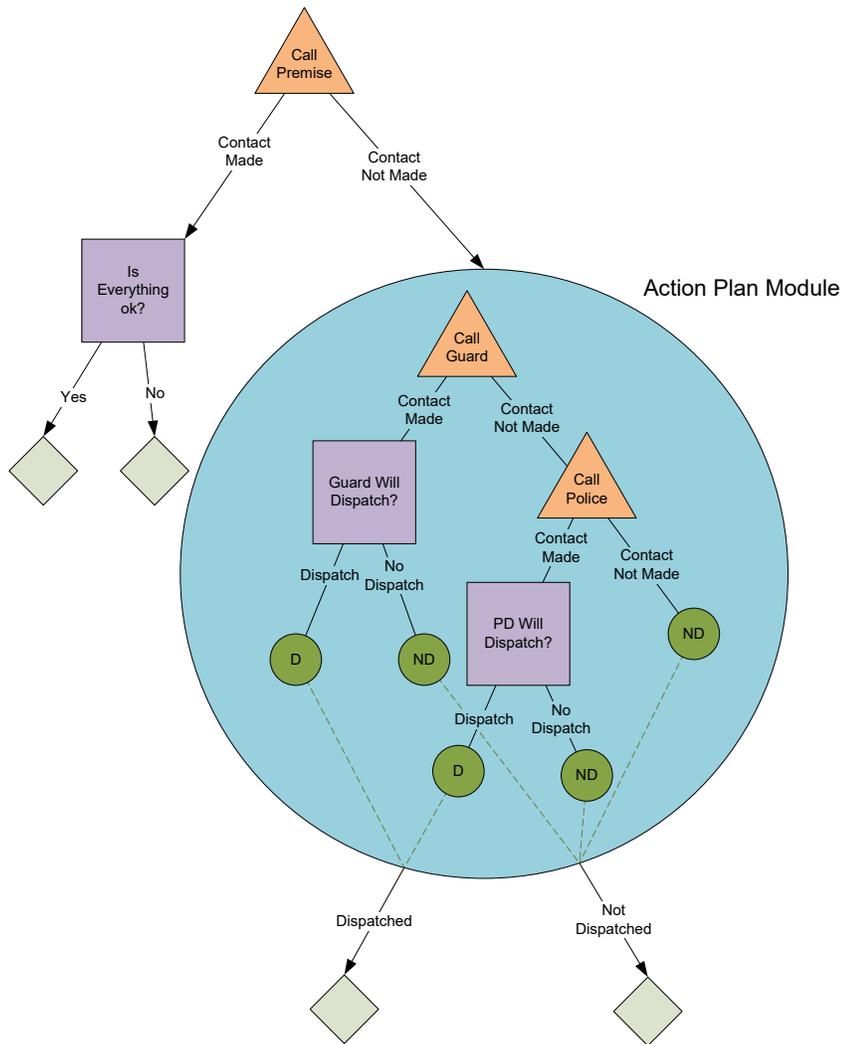
In the example, 2 outcomes of 'Dispatched' are combined into one branch and 3 outcomes of 'Not Dispatched' are combined into one branch.

In the Action Plan setup, a Module is entered by selecting the Module (M) action type. A module is then selected.

|	
description	Call Premise...
dispatch instruction	(A)
action type	M ☑ Module
voice file name	
variation level	
module	1504 ⌃ Call Prem Burg

The Modules are set up with steps similar to Action Plans. The branches of the step tree end in either a 'Go to Return Label' (G) type step or a Full Clear. The G type step is assigned a value for Module Return Label.

Action Module Steps
- Call Prem
  - ○ Can't get hold of Premise
  - Contact made, Is everything OK there?
    - All is fine-- ask for codeword/pin
      - ○ Codeword/PIN
      - ○ No/Bad Codeword/Pin
    - ○ No, all is NOT fine. Help!

Action Plan Module Item

parent action	⌃ All is fine-- ask for codeword/pin
action outcome	VPIN,VCWORD ☑
description	Codeword/PIN
dispatch instruction	(A)
action type	G ☑ Go to Return Label
voice file name	
required with parent	☐
module return label	CancelAlarm

In the Action Plan, the children steps of the M type step are assigned to a Module Return Label.

Action Plan Steps
- Call Premise...
  - ⊞ Disp Agency
  - ⊞ Answered at Prem, noCW, call ECV
  - ⊞ No answer at Prem, Disp Agency
  - ⊞ All is fine, with good CWPIN, log cmnt

Action Plan Item

parent action	⌃ Call Premise...
module return label	CancelAlarm ☑
description	All is fine, with good CWPIN, log cmnt
dispatch instruction	(A)
action type	O ☑ Operator Action
voice file name	
variation level	
required with parent	☐
operator action	cmnt ⌃ Comment
confirm opact	☑

The module will be followed seamlessly by the operator. In the tree structure for the Step Navigator, M type steps will branch into the module steps and the possible outcomes of the module. The outcomes display with the Module Return Label in front of the Step Description grayed and italicized. The G type steps in the module display the Module Return Label at the end grayed and in parentheses.
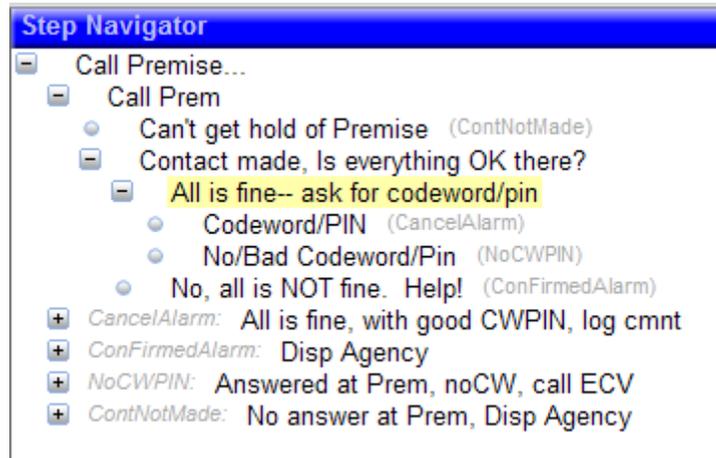
In the example, if a codeword/PIN is matched, the 'CancelAlarm' return label will be the executed and the operator will be prompted with the action dialog for the 'All is fine, with a good CWPIN, log cmnt' step and if a codeword/PIN is not given or bad, the 'NoCWPIN' return label will be executed and the operator will be prompted with the action dialog for the 'Answered at Prem, noCW, call ECV' step.

Memos

A Memo system has been added to send messages between stages Departments and to Site Groups in the External Application. Memos replace the Web auto process type.

The Memo Inbox is available from the Utilities menu. The Inbox can be filtered for To Dept, From Dept, and From Site Group #. Memos are listed with options to Delete, Mark as Read/Unread, and Reply. Selecting a row opens the detail for the memo on the right.

Memos can be sent from a Site (Dispatch or Data Entry) or generally from the Send Memo utility. Memos sent from a site will reference the Xmit# and Site Name automatically. A Memo auto-generated by an event will reference the Event Code and Point also.

A tab for Memo has been added to Site Data Entry for Memos and Memo history associated with the Site.

Departments are set up in Setup | stages™ Setup | Department. Departments are assigned to Users in User Role. The default Monitoring Department is also set up in stages™ Options. The stages™ Option Monitoring Department is used by Auto Process Memos.

Deleted Memos can be referenced in the Memo History utility.

Auto Process

Memo Auto Processes are set up to send to a Site Group Type, a Department, or both.

If the Auto Process is sent by an Operator Action, the comment will be included in the Memo.

Quality Assurance

A Quality Assurance (QA) feature has been added. Unlike Memos, the Quality Assurance Incidents are not visible from the Site and can be restricted to certain users through permissions.

From Dispatch, Data Entry, or Quick Call, the 'Report a Problem' link opens a QA Incident entry.
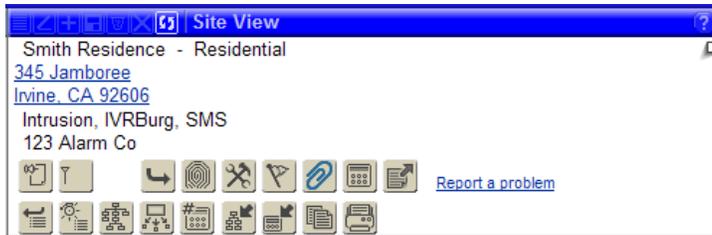
QA Incidents are entered with a Department, QA Type, Severity, Operator, Comment, Status, and Callback Contact.

QA Type, QA Severity and QA Resolution are Setup Tables.

QA Incident Search

department	☑
status	☑
site ⌃	

▶

Incidents

	Department	Type	Severity	Incident Date	Status
🏳	Monitoring Station	Subscriber Inquiry	Low	03/11/11 15:22:00	Open
🏳	Data Entry			03/11/11 09:56:00	Closed
🏳	Monitoring Station			03/11/11 08:26:00	Closed
🏳	Data Entry			03/11/11 08:21:00	Open
🏳	Data Entry	Subscriber Inquiry	High	03/11/11 08:12:00	Open
🏳	Data Entry			03/10/11 14:20:00	Open
🏳	Call Center	Subscriber Inquiry	Low	03/10/11 14:15:00	Open
🏳	Data Entry	Subscriber Inquiry	Medium	03/09/11 11:00:00	Open

Incident Detail

site name	Smith Residence	
department	Mon	☑ Monitoring Station
type	SI	☑ Subscriber Inquiry
severity	Low	☑ Low
incident date	03/11/11	🗓 time 15:22
operator		⌃
comment	Customer called to complain about service on last dispatch	
status	O	☑ Open
resolution		☑
reviewed	☐	
reviewed date		🗓 time
callback contact	⌃ Mr. John Q Smith Jr.	
callback info		
called back date		🗓 time

QA Incidents are maintained in the QA Incident Search utility. Incidents can be filtered by Department, Status, or Site. Updates to the Incident can be recorded.

Site Summary

Site Name and Address are separated from the rest of the site information and given more emphasis. The hyperlink to open Google maps for the address has been separated from the address and moved to the right.

History

An event that raises the priority of an alarm supersedes the initial alarm. This is displayed as an orange bar in the History window. The events for the current alarm, including superseded alarms display in bold. New events display in bold and blue until the recent history is refreshed.

Alarm Graph

On the Alarm Dispatch window, a bar graph displays a visual presentation of the alarm during the dispatch process. User defined event codes/operator actions (see Alarm Categories) will create a 'cell' in the bar graph. The graph is drawn in real time. A flyout gives details of the cell.

Burg, Access, Fire, Call, Call, Call, PC, Access

Alarm History

Superseded Alarms are condensed into one entry in the Alarm History list.

(Detail Below)

A "summary" graph displays in the Alarm History List, grouping the Alarm Categories together and ordering them according to the Alarm History Order Num. Categories without an order num are not included in the graph. All events are given the same width and the style code is not followed.

Access (2), Fire (1), Call (12), Full Clear (1)

The Alarm Graph for the selected alarm is displayed between the Alarm History list and the Alarm Events list.

The Alarm History Events List can be emailed out from the header of the table.

Alarm Categories

Event Codes, Service Types, and Operator Actions are organized into Alarm Categories.

Alarm Categories are used to construct the cells in Alarm Graphs and define the Status Change message in dispatch.
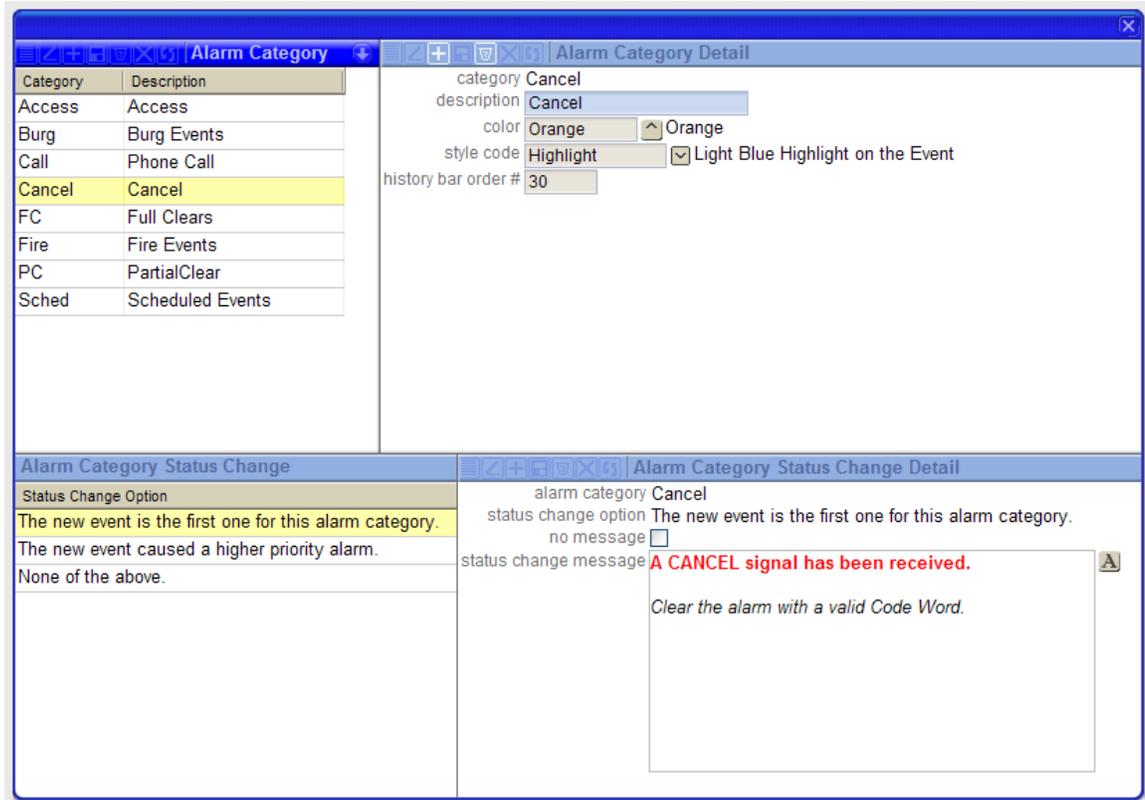
Setup | Alarm Processing Setup | Alarm Category

Alarm Categories are set up with options for Color, Style Code, and History Bar Order #.   Styles affect the cell in the Alarm Graph and include Wide, Narrow, Highlight, and End.

Blue–No Style, LightBlue–Narrow, BlueGreen–Wide, Orange–Highlight, Green–End

For each Alarm Category, the Status Change message can be defined. If nothing is defined at the Alarm Category level, the global Status Change from stages™ Options will be used. The Status Change can be set generally (none of the above) and conditionally for the First New Event in the category, and when the category causes a higher priority alarm. The Status Change can be turned off by the 'No Message' flag. The message is entered in Rich Text.

Status Change

The Status Change Message in stages™ Options has been changed to Rich Text.

Status Change displays the Alarm Category and the appropriate Status Change Message for the Alarm Category/Option.

Status Change

Burg Events

The Status of the Device has changed.

To load the new Action Plan, complete the current step or press
the Refresh button on the Dispatch Action Wizard. The new
Action Plan will only be loaded if the signal is of a higher priority.

Press OK to Acknowledge.

[OK] [Ignore]

If more than one signal is received at a time, the Status Change message will have
all the messages combined.

Status Change

Burg Events, Cancel

First **Burg**

Make sure that this is noticed.
This is *Important*

A CANCEL signal has been received.

Clear the alarm with a valid Code Word.

[OK] [Ignore]

When the No Message flag is in effect, History will refresh without the modal
message opening.

Call List Category

Call List Categories allows for ordering the categories of phone numbers in the call list and applying a style to the category. Categories include Agency, SGContact (Site Group Contact), Site (Premise), Site Contact, and Site Group
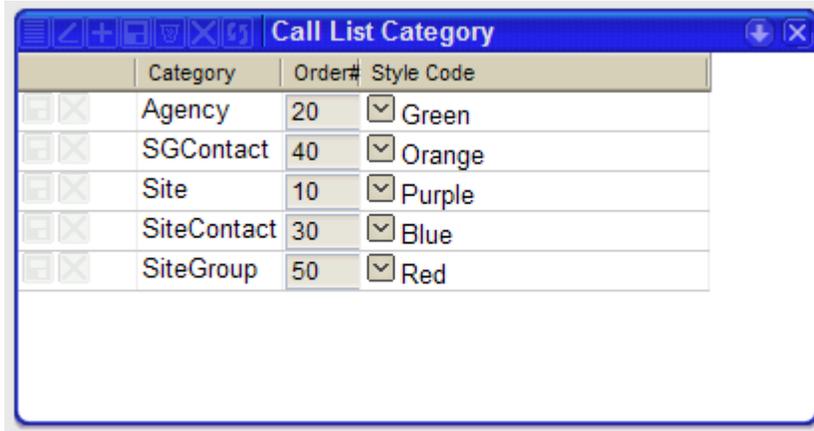
	Category	Order#	Style Code
	Agency	20	Green
	SGContact	40	Orange
	Site	10	Purple
	SiteContact	30	Blue
	SiteGroup	50	Red

Setup | Phone Setup | Call List Category

Available Style Codes include Blue, Blue-Green, Gray, Green, Yellow, Orange, Purple, and Red.

AP	#	Name	Type	Phone	Type	Call Disposition	Order	Relation
		Site		714.456.2233	Premis			
		Anaheim Hills Police	Police	714.333.6667	Work			
		Anaheim Hills Police	Police	714.555.3337	Work			
	10	Bryan Weissman		714.654.9988	Cell			
	10	Bryan Weissman		714.789.4455	Work			
		John Floyd (Dealer)	Special	714.852.7733	Cell			
		Floyd Dealer		784.5899	Work			

On Test

The Test/Runaway Category window has been split into a view only list and an editable detail.

'Auto Notify Results Option' has been added to Test Category with options for SMS or Email. When Placing on Test, a recipient is defined in Auto Notify Results Recipient. SMS/Emails will be sent after each test event. A verified contact will be defaulted as the recipient.

The entire Test Results can be emailed from the Test Events window

.

Signal Code has been added to the Advanced Details for Advanced Test options in On Test and Recurring Tests.

Holidays can be assigned to Recurring Tests.

Contacts

'Contact List Member Only' Flag has been added to Contact Detail. A contact with this option will only be called by the Action Plan on a Step that calls the recipient type 'Contact List Type' and the contact belongs to the matching contact list. Steps targeting other recipient types ('Site Contacts All', 'ECV', 'Relation', 'Authority', etc.) will skip these contacts. A contact with the option enabled and with no contact lists, will not be called by the Action Plan. This functionality applies to both Site and Site Group contacts.

The Contact Lists tab in Site Data Entry displays for each Contact List Type, the contacts and list order number. Contacts can be added to list types from this tab.

Contacts can be assigned to devices to limit the contact to call lists for alarms on the selected device(s).
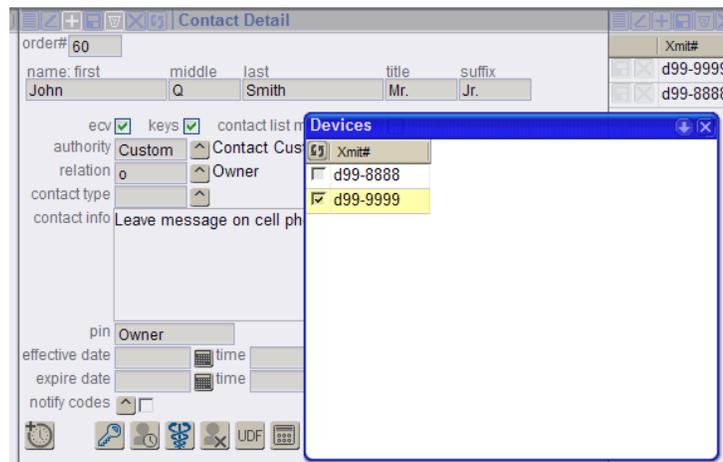
The Device button will display in blue when Devices have been selected.

A Comment field has been added to Contact Patients.

A default Authority can be assigned to the Site and Site Group. If a contact does not have an Authority, the Site default Authority is used. If the contact and Site do not have an Authority, the Site Group default Authority is used.

Schedule

For sites that have multiple areas, a Multiple Areas Option dropdown has been added. The options include:
>   Any Area Open/Close satisfies schedule.
>   All Areas must Open/Close to satisfy schedule.

With 'Any Area', one expected event is used and the schedule is opened/closed when any of the areas opens/closes. With 'All Areas', each area uses its own expected event and the schedule is not opened/closed until all areas are opened/closed.

OOS

The OOS Category of a Device already placed Out Of Service can be changed without placing the Device In Service and then Out of Service.
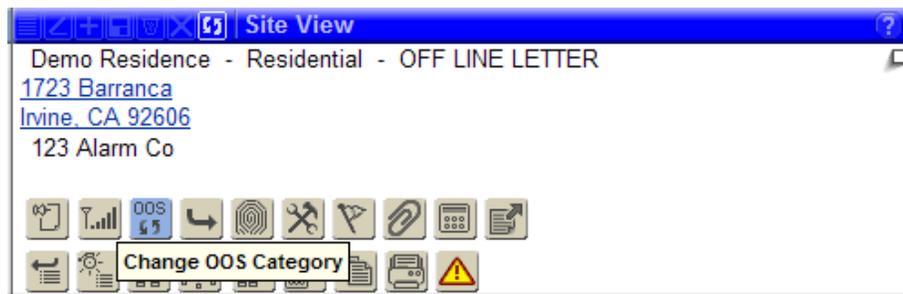

Escalate Timer Test

The Processing for Escalate Timer Test has been modified to check for the Last Signal, then the Device In Service Date, then the First Signal Date when determining the total time since the last timer test. Previously, Device In Service Date was not checked.

Bad Phone

Bad Phone Search and has been added to Utilities | Lists.   The results are filtered by Site Group and Start/End dates.   The results can be exported to a spreadsheet. Additionally, all bad phones in the database can be exported to a spreadsheet.
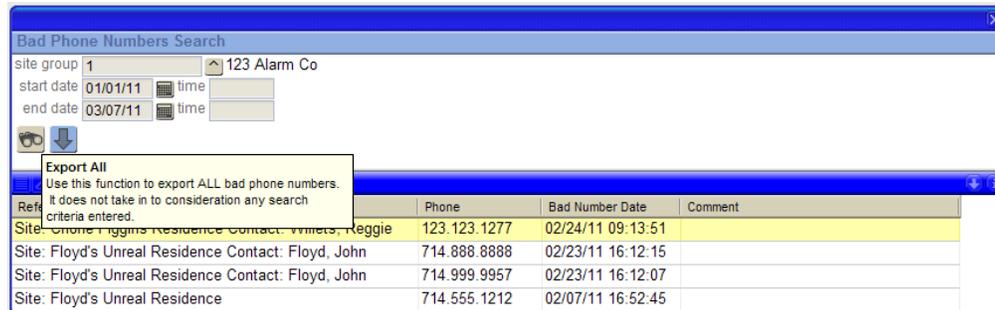
UDF

The Setup Code Description is displayed for UDFs with a Drop Down or Lookup.

'Exclude External Flag' has been added to UDF fields to remove the UDF from the UDF list in the External Applications.

Site Database Report

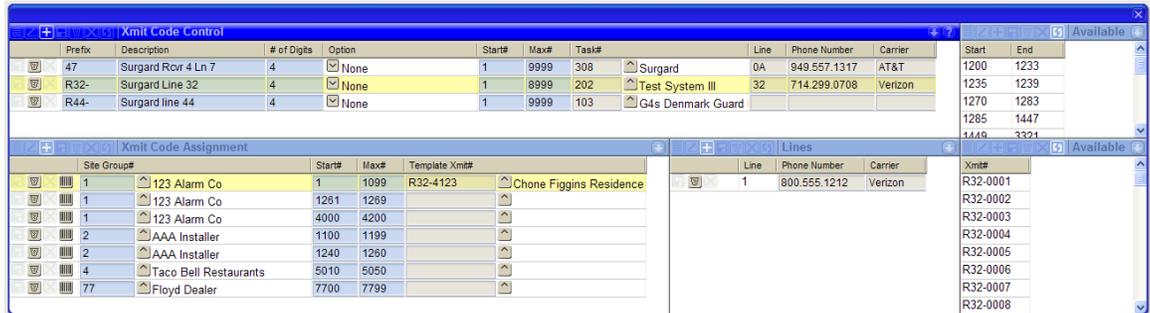UDFs for Site and Device are included in the report.

Lockbox Code and Lockbox Location are included in the report. By default this information will be hashed with an option to make the information viewable.

No Activity Report

Exclude OOS flag has been added.

Xmit Code Control

A List of Available Xmit ranges by Prefix has been added to the top right.

Template Xmit# has been added to the Xmit Code Control setup. When devices are created, site and device information from the template will be included in the created sites.

External Application

On the summary window, the list of Site Groups (Log in Site Group, All, Sub Site Groups) is in an index of the left. Selecting a Site Group from the index filters the Summary to only include that Site Group.

Memo Inbox has been added to the top of the summary window. The number of memos in the inbox is a hyperlink to open the inbox. The notifications hyperlink has been removed from the Summary. Send Memo and Memo History have been added to the Utility menu.

Contact Phones will be returned in Search results.

History can be accessed from Search results, Advanced Search results, and Recent Alarms.

Manual Events are restricted to events that are both marked with a service type of 'Manual' and included in the External Event Code setup. 'Manual' Events will not be available in the Event Code Lookups for Device Configuration, Schedules…etc.

Access to Global Action Plans in Utilities is a separate permission for the External Application.

The one-click place on test using the external app test category from stages™ Options is a separate permission "Quick On/Off Test". The "On/Off Test" permission still grants access to the advanced test and the Mobile Applications.

Site Audit Search has been added to the Utilities

In the Contacts Detail, buttons have been added for Device, Expire, Inactive, Patients and UDF. Patient Information is a separate permission.
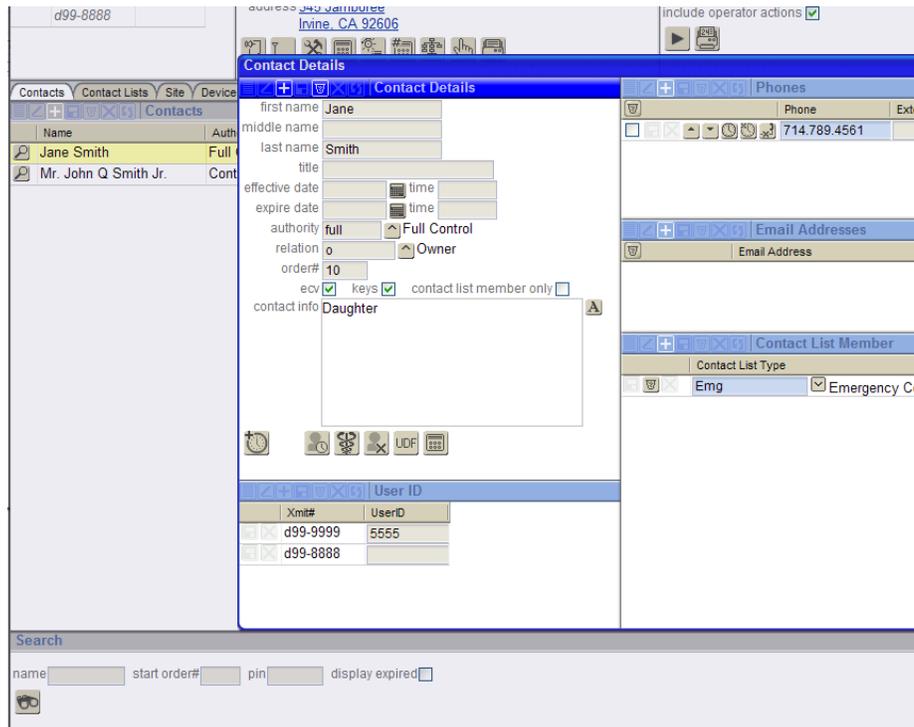
The list of Contacts has a Search at the bottom to filter the list.

Listen In Device Type has been added to the Device setup.

Custom Banners for the External Applications (Site Group and End User) can be accessed before log in by including '?SiteGroup=[SiteGroup#]' at the end of the URL. If a login does not match the Site Group provided in the URL, the banner will change to the default or the appropriate custom banner.

New Permissions

Action Module
Alarm Category, Write
Call List Category, Write
Department, Write
Memos
QAReportProblem (Site Information)
QAMaintenance (Utilities)
QASetup (Setup)
QAResolution, Write (QASetup)
QASeverity, Write (QASetup)
QAType, Write (QASetup)
App2 – Global Action Plans
App2 – Patient
App2 – Quick On/Off Test