Manitou - Data Conversion Review Checklist

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Manitou Data Review and Signoff

Thank you for taking the time to review your data carefully. This document confirms everyone involved with your Implementation is on the same page and all items are verified. The following Checklist touches all the core data verification locations. This document ensures that you accept the data conversion in preparation for Go-Live. Bold Group will continue to support you concerning your data to help you make any final adjustments to your post Go-Live conversion.

Data Conversion Objective

A data conversion consists of basic core functionality. The conversion will get your data close to what existed in the previous system. The data conversion also provides an opportunity to review and clean up your data to optimize the features in Manitou. Please discuss and establish any cleanup items with your Bold Group Project Manager and Data Conversion Specialist.

You must have dedicated adequate resources to the data review process.

Supervisor Workstation

Manitou's configuration and setup completed within the Supervisor Workstation help ensure that all settings meet your business practices. Below is a list of items to review:

____ User Creation - we created Manitou Users and set their permissions.

____ Event Codes - we reviewed and updated the Event Codes to reflect the priorities and Global Actions to fit our business practices.

____ Event Maps - we completed an extensive review of our Contact ID and other Event Maps to ensure signaling into Manitou is acceptable.

____ Resolution Codes - we reviewed and updated the Resolution to reflect our needs.

____ Receiver Line Prefixes - we reviewed, edited, and created Receiver Line Prefixes required for directing signals to the appropriate accounts.

____ Receiver Configuration - we reviewed and edited the Receiver Configuration to confirm that the lines and prefixes assigned to those lines reflect the correct information for the signals to arrive in the correct accounts.

____ Country Settings - we verified that our Country settings are correct including date/time telephone pictures and UL settings.

____ Regions - we verified that all the regions (states) are listed for our location.

____ Cities - we have reviewed our Cities. We understand that corrections of misspellings and the wrong location within the wrong state are our responsibility to remedy after Go-Live.

____ Postal Codes - we have reviewed our Zip/Postal codes. We understand that the correction of bad zip codes, such as blank, 00000, or 99999 is our responsibility to correct after Go-Live.

____ Global Holidays - we have entered the Global Holidays required for our company.

____ Options - we have reviewed and set our System Options to reflect our needs.

Customer Records

To properly service your customers, it is important to review a reasonable sampling of your customer records for completeness and accuracy. The following items are to ensure you have checked all the important customer information:

____ Customer Form – We reviewed a reasonable sampling of our accounts and verified that the following items are in place:

____ Main Customer Form has the correct:

____ Address.

____ Premises Type.

____ Account Type.

____ Time Zone.

____ Details Form has the correct:

____Premises phone number(s) (if applicable).

____ Dealer Information (if applicable).

____ Authorities.

____ Email address(es) (if applicable).

____ The Systems Form has the correct:

____ System(s).

____ Transmitter(s):

____ Receiver line prefix(es).

____ Transmitter ID(s).

____ Test interval (if applicable).

____ Programming:

____Signal Translations.

____ Specific Event Actions.

____ Areas:

____ Applicable Schedules applied to the area(s).

____ Zones.

____ Open/Close schedules display appropriately.

____ Contact list displays all persons and entities linked to the account.

____Call Lists contain all the expected call lists (if applicable).

____ We reviewed and set applicable Customer-level Action Patterns.

____ We reviewed and set any applicable General Schedules and linked them appropriately to their records.

____ We verified Account and Signal activity within the Customer Activity Log.

____ Partitioned Accounts:

____ We reviewed and verified our Partitioned accounts are listed within Manitou as Main and Sub Accounts.

____ Master/Related to Master:

____ If applicable, we reviewed the accounts with relationships where the properties have different accounts but they relate to a Master, such as the Regional Office.

Dealer Accounts Verification

Where applicable, the dealer accounts need similar attention during the data review process. When dealers have special alarm handling expectations are they noted and linked to either a Default Transmitter type or on the Dealer Record itself? Below are items to ensure are in place within your Dealer records as a part of your data review:

____ We reviewed a random sampling of our Dealer accounts and verified that the following items are in place:

___ Dealer Form has correct:

____ Address.

____ Contact Phone Numbers.

____ Email address(es).

____ Contact List contains:

____ Contacts.

____ Phone Number(s).

____ Notes.

____ Call Lists (when applicable).

Authority Verification

It is important to ensure all applicable authorities are listed within the Authority Records and properly linked to a Customer Record.

____ We have reviewed a random sampling of our Authority Records and verified that the following items are in place where applicable.

____ Authority Form has the correct:

____Authority Type.

____ Address.

____Contact Phone Number(s).

____ Contact List contains the following as expected:

____ Contacts (if applicable).

____Contacts contain their applicable Contact Points (telephone, email, etc.).

____ Call Lists contain all expected persons and lists.

Agency/Group Verification

If your site utilizes Agency or Group Accounts for notifications or secondary dispatching of guards, it is important to ensure the appropriate data is listed within their Agency Record.

____ We have reviewed a random sampling of our Agency and Group Records and verified that the following items are in place:

____ Agency Form had the correct:

____ Agency Type (Guard, Cleaner/Janitorial, Group, Call Group, etc.)/

____ Address (if applicable).

____ Contact Phone Number(s).

____ Email Address(es).

____ The Contact List contains the following as expected:

____ Contacts with names and permissions.

____ Contact details contain all applicable telephone numbers and contact points for each permission on the Contact List (if applicable).

____ Notes table contains person-specific comments (if applicable).

Signal Verification

The most important part of your business is Event Signaling. This is very crucial to ensuring Day One operations are smooth.

____ We agree that we reviewed the Alarms passed into Manitou from our receivers.

____ We reviewed Events presented to Manitou as Activations (*A) then researched how the Alarm presented in our legacy system and reported discrepancies to our Project Manager and Data Conversion Specialist.

____ We reviewed our Raw Data log (alone or with Bold Group staff) for the Signal and then verified if there were programming lines within the customer or default Transmitter Type records.

____ We reviewed our DMP signaling events and programmed our defaults or customer records to manage them within Manitou (if applicable).

____ We reviewed Events presented to Manitou as Unknown Events (**) then researched how the Alarm presented in your legacy system and reported discrepancies to your Project Manager or Data Conversion Specialist.

___ We reviewed the Events received, identified any mismatched Events, and reported the discrepancies to your Project Manager or Data Conversion Specialist.

____ We reviewed our Partitioned Accounts and verified that Signals are presenting as expected into the Main and Sub Accounts.

___ We reviewed all signaling Events within the Supervisor Workstation and agree that Events are set to acceptable standards for our business practices.

____ We understand that if an Event presents with an incorrect Transmitter ID, we may have to manually update the applicable Account(s).

Support

Your Manitou Data Conversion Specialist will continue to assist you with any final manual updates following your Go-Live data pass. Data conversion will get your company to about 95% of your data correct within the conversion, it is important to recognize that small adjustments will be necessary to ensure that the last 5% is set to ensure proper functionality within Manitou.

Upon Go-Live, you will receive an electronic copy of our Out-of-Hours support details and definitions. Out-of-Hours support is defined as the inability of operators to process alarms.

Reported Outstanding Items and Resolution:

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Completion:

We agree that we, and our Data Conversion Specialist at Bold Group, reviewed a reasonable random sampling of our Accounts. We reported all discrepancies to Bold Group and are satisfied that our items were adequately addressed. We also understand we will need to do some manual adjustments to perfect our data.

Signature: ____

Printed Name: ____

Company: ____

Title: ____

Date: ____

Which data pass is this review for (i.e. First, Second, Go-Live): ______________________