WinSen Home Office

Sentinel Systems Corporation

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Contents

Introduction

Overview

The Home Office Package is a combination of Windows-based programs. It allows the management company or owner of one or more self storage facilities who are running our **WinSen Property Manager or Electronic Manager** software to collect data from the storage facilities. The simplest method of data collection uses the program to print reports at the site, which are then delivered to the main office. Another alternative is to have the reports sent via fax from the facility to the main office. Both of these methods require only the WinSen Home Office Site module. The other two output options also require the WinSen Home Office Main module. The reports and/or data may be sent via e-mail to the main office. Or, the reports and/or data may be sent via a direct modem to modem connection between the site and the main office.

You may define reports sets at the facility and schedule them to occur on a daily, weekly, monthly, quarterly or yearly basis. The system will automatically generate the reports and deliver them via the appropriate output method. Additional files may also be sent via the e-mail and modem options. Once the report sets are defined, the process takes very little of the manager's time.

If you send reports to the main office via e-mail or modem, the Home Office Main module allows you to selectively view or print the reports. The reports are archived on the Home Office computer hard drive so that they may be viewed and/or printed at some later time.

Daily Operations at the Site

Operations at the site are very simple. After closing for the day and backing up the **WinSen** database, the manager selects WinSen Home Office Scheduler. This program waits until the scheduled time and then generates the configured reports. The reports are printed if that output option was selected. Otherwise, after compressing the reports, the system either sends the reports via e-mail or waits for a direct modem to modem connection. The manager can leave for the evening and the program will handle the communications and upload process automatically.

Daily Operations at the Main Office

If you are using the e-mail option, the computer at the main office will be set up to automatically dial the Internet Service Provider (ISP) to retrieve e-mail on a regular basis. Reports and data sent by the facilities are retrieved and stored on the computer. Because the information is compressed before being sent, it requires less space on the computer. The information may then be viewed, printed, or extracted.

If you are using the modem option, the computer at the main office will be set up to automatically dial all the configured sites at a pre-defined time (for example, in the middle of the night when phone rates are lowest) and download the reports and data generated in advance at the storage facility as explained below. Since the site computer compresses the reports, download times are reduced considerably.

System Requirements

The minimum PC computer requirements are as follows:

- IBM PC or 100% Compatible

- Pentium II processor or higher

- Microsoft Windows 98, NT 4, 2000, or XP

- 128 MB RAM (256 MB recommended)

- 1 GB hard drive

- 100 MB free hard drive space. Saved data and report files will require more space.

- VGA Monitor

- Modem: 28.8K baud modem or higher required for modem to modem transfers.

- E-mail account: required for sending and receiving reports via e-mail. You will need the configuration information provided by your Internet Service Provider (ISP) when configuring WinSen Home Office. Please refer to "Appendix A - Mail Clients & Protocols" on page 30 for a list of supported mail clients.

Manual Conventions

Example Keystrokes

When a key needs to be pressed, this manual will enclose the key description with angle brackets as shown:

< >

The brackets are for clarifying what key is to be pressed and are not part of the keystroke. For example, when you see something like:

Press the **<Enter>** key to continue

This would mean to press the **Enter** key. The angle brackets are only for clarification.

Example Commands

When a command needs to be typed, it will be shown in bold. For example, when you see something like:

Type **A:SETUP** then press <**Enter**>

This would mean to type in A:SETUP followed by pressing the Enter key.

Example Screens

The screen shots in this manual were taken on a computer running Windows 95. If your computer is running a different version of Windows, your screens may look slightly different.

Selecting Items from the Menus

To describe selecting a menu item, menu items will be separated with a pipe symbol, "|". For example, to denote selecting "Open File Set" from the File Menu, it will be shown as

File|Open File Set

Selecting "Site Setup" from the "Maintenance" menu would be shown as

Maintenance|Site Setup

Installation from CD-ROM

1. Before installing, we recommend that you close all open applications.

2. Insert the WinSen CD into your CD-ROM drive. After a few seconds, the "WinSen Installation System" will run automatically. Select the "Install WinSen" option to run the WinSen Setup program.

3. If for some reason the WinSen Installation System does not run automatically, point to the Start button to display the Start Menu. You can also bring up the Start Menu by pressing **<Ctrl+Esc>**. From the Start Menu, choose "Run", then type **D:\Setup** and click **OK**. This assumes D: is your CD-ROM drive, if this is not the case use the appropriate drive letter. The WinSen setup program will run.

4. An introductory message will be displayed, recommending that you backup your data before installing an update. If you are installing an update and have not backed up your database, we strongly suggest that you do so before continuing. Click OK to display the Welcome dialog. After reading the messages in the Welcome dialog, click Next.

5. The **Software License Agreement** dialog will be displayed. After reading the Software License Agreement, click **Next** to continue. You must click **Next**, indicating your acceptance of the agreement, to install WinSen.

6. The **Select Components** dialog will be displayed. In this screen you can select or deselect which WinSen components to install. A default set of components will already be selected. The "Updated Reports" and "Updated Word Templates" options install the latest reports and Word templates. If you have customized reports or letters, note that the installation program will make backup copies of the reports (in a folder called RPTBKUP) and Word letter templates (in a folder called DOTBKUP) before installing the standard ones. This allows you to restore any custom reports and/or letters after the installation is completed.

    The **Home Office Site Module** is installed at the facility. The **Home Office Main Module** is installed at the main office. Ensure that **Home Office Main Module** and/or **Home Office Site Module** is selected as required, then click **Next** to continue.

7. The **Choose Destination Location** dialog will be displayed. This allows you to select the installation location for WinSen. If you have previously installed WinSen the previous installation folder will be selected. The default location is C:\Winsen. Click Next to continue.

8. The **Select Program Manager Group** dialog will be displayed. This allows you to specify the name of the folder under the Start Menu where you wish the WinSen program shortcut icons to be created. The default name is WinSen. Click Next to continue.

9. The **Start Installation** dialog will be displayed. Click **Next** to install the selected WinSen components.

10. The **Installation Complete** dialog will be displayed. Click the **Readme** button if you wish to read the latest WinSen release notes. When you are ready, click **Finish**.

11. You will now have a new program group called "WinSen" (this may be different if you chose a custom installation). Within this program group will be icons for the WinSen programs you installed.

12. You must now license your WinSen program. Please contact your Sentinel Sales Team member or our Technical Support Department at 1 800-456-9955.

This concludes the CD-ROM program installation.

Running the Program

To run WinSen Home Office use one of the following methods:

1. If you are running WinSen Property Manager, select "Home Office Site Module" from the "Special" menu of WinSen Property Manager (Special|Home Office Site Module).

2. Select the appropriate option from the "WinSen" program group. This is done by pointing to the Start button, then Programs, then WinSen. At this point, select WinSen Home Office Site Module, WinSen Home Office Scheduler, or WinSen Home Office Main Module.

If you are running the trial version of WinSen Home Office for the first time, it will display an introductory message saying that the trial period is 30 days. The program will run for 30 days from the first time it is run. To obtain a license key to enable the full version, please refer to the following section, "Licensing".

Licensing

The licensing function is used to enter the user registration information, and change the WinSen licensing options. The WinSen CD-ROM contains all WinSen programs. You can install any of the programs on the CD, but if a particular program has not been purchased, it becomes a trial version which will run for 30 days from the date of installation. The WinSen Licensing form allows you to enter a software key which changes purchased software from trial to fully enabled versions.

The WinSen Licensing program is used to license the software you have purchased. There are two ways to run the WinSen Licensing program. You can either select the Licensing option from the Help menu, or point to the Start button to display the Start Menu, select the "Run" option, type in **c:\winsen\license**, then click **OK**. The following form will be displayed:

If you do not already have a license key, contact Sentinel Systems (SSC). You will be asked for the **Computer ID** number displayed by the Licensing form. Based on the **Computer ID** and the software you have purchased, SSC will create a license key consisting of a sequence of characters you will enter in the **License Key** field. The key can be received from SSC via telephone, fax, mail, or electronic mail. When you receive it, write it down in a safe place in case you ever have to reinstall the software. Note that the key is good only for the original computer; if you need to transfer the WinSen software to a new computer, contact SSC for a new license key.

The **Registered Programs**, **Options**, **Unit Limit**, and **Net Licenses** fields show the programs and options that have been purchased, the number of units allowed in WinSen Property Manager, and the number of network licenses purchased. These fields are for display only and cannot be directly changed.

The **Trigger Codes** fields are used for special situations. For example, if you are running WinSen on a trial basis, and the trial period has expired, and you would like another 30 day trial period, SSC can issue a trigger code to accomplish this. In cases like this, contact SSC and give the technician the **Code Entry Number** and the **Computer ID**. You will then be given one or two trigger codes.

In the **Name** and **Company** fields, enter the name of the person who owns the software, and the company name. The **Serial Number** field cannot be edited; it will be set appropriately by the license key. Enter the license key or trigger code(s) received from SSC in the appropriate field, then click **OK**. All appropriate software options will be enabled according to the entered license key or trigger

code(s), and the Licensing form will close. The changes will not take effect until you close and reopen WinSen.

Printers and Report Viewing Dialog Boxes

In several areas of the program, you can select to have the report sent to a different printer, or to a window. In either of these two situations, you will be presented with a dialog box. Following are instructions on using these dialog boxes.

Select Printer Dialog Box

When printing a report, you can change the destination printer by choosing the "Printers" button. When you do this you will see the following dialog box:
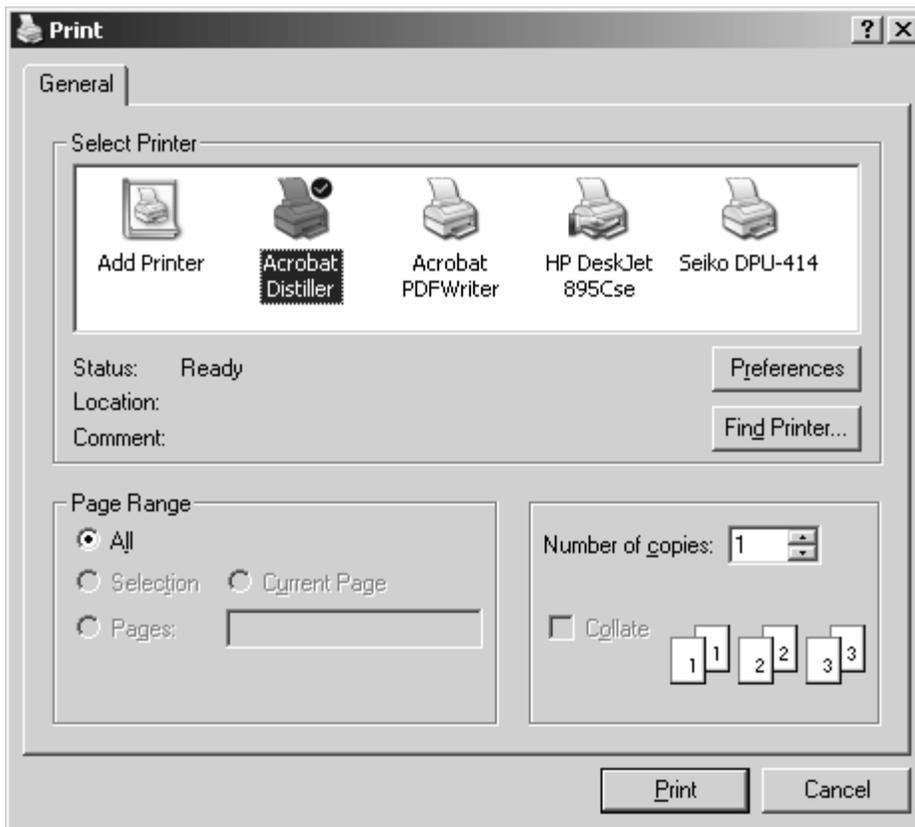
All printers that have been set up within your Windows installation will be listed. Select the desired printer by double clicking on it or by highlighting it and choosing "OK".
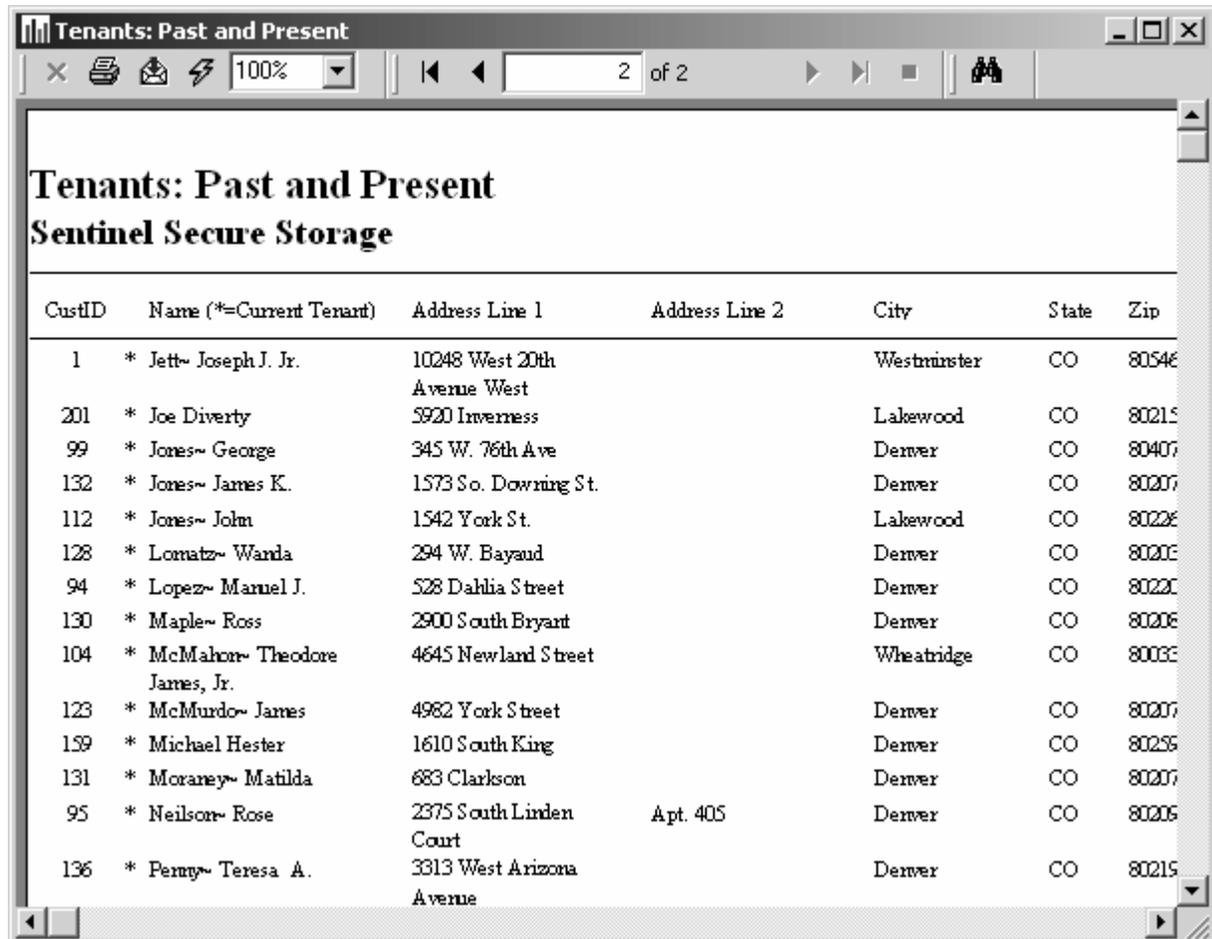
Setup button

Choose this button to setup the currently highlighted printer. A dialog box similar to the following will appear:
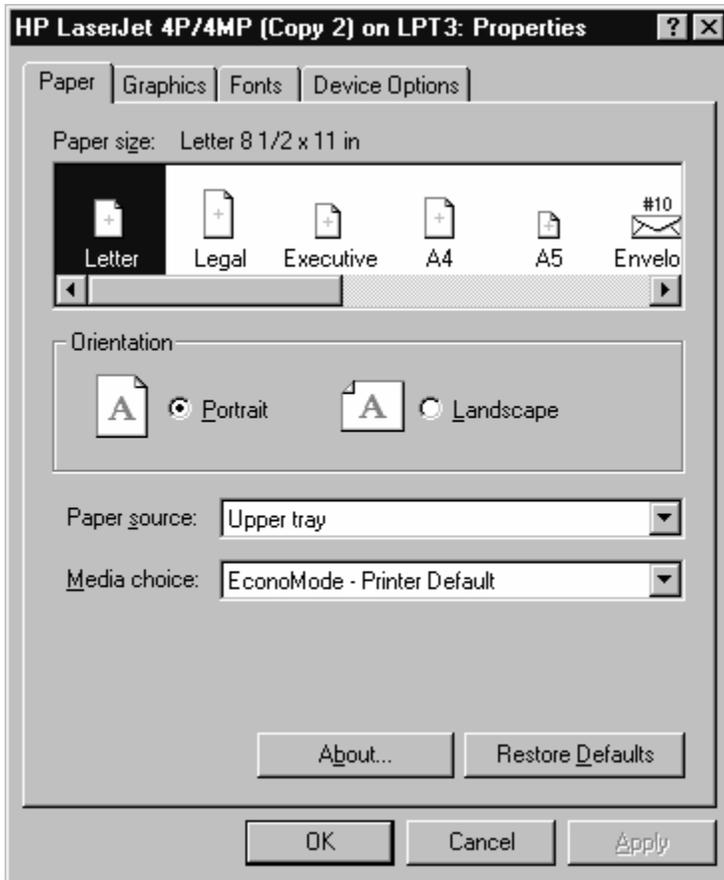
This dialog box lets you setup printer options such as the resolution, paper size and source, amount of memory installed, etc. The exact format and options of the dialog box will vary depending on the printer. For additional help using the Printer Setup dialog box, press **<F1>** or choose the "Help" button while it is active, or consult your Windows documentation.

Report Viewing Form

When printing a report or a letter, you can choose to have the output sent to a window. When you do this, the document will be displayed in a window as follows:

Special Documentation Help File

WinSen Home Office comes with a special documentation help file, called **HOREADME.HLP**. This file will contain changes made to the program since the manual was printed. To view the file, click on the "Home Office Readme" icon in the WinSen program group. This will launch Windows Help, displaying the file. You can then browse the file in the usual manner.

Operation at the Site

Introduction

This section describes the WinSen Home Office Site Module and the WinSen Home Office Scheduler. These programs allow the manager to define collections of reports to be generated on a regular basis. These collections are called report sets and are stored in files with a ".hos" extension. The Site Module is used to define the report sets and the Scheduler is used automatically generate the report sets at the scheduled time. The report sets may be defined at each facility or they may be defined at one facility and then copied to the other facilities.

We will begin by discussing the options available in the Site Module and then move on to the Scheduler.

Organization of the Site Module Menus

The following is the organization of the menus for the WinSen Home Office Site Module and a brief explanation of each menu selection. The various options will be explained in detail later in this section.
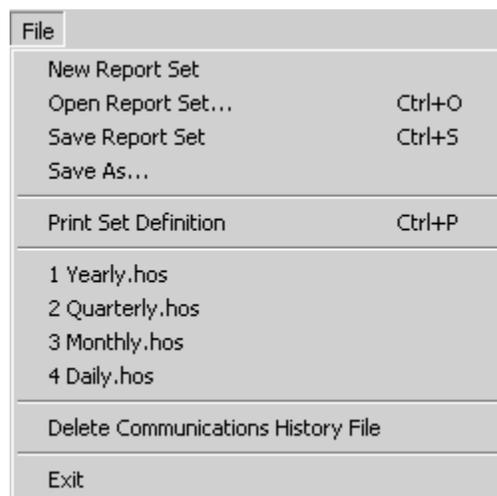
File

File	
New Report Set	
Open Report Set...	Ctrl+O
Save Report Set	Ctrl+S
Save As...	
Print Set Definition	Ctrl+P
1 Yearly.hos	
2 Quarterly.hos	
3 Monthly.hos	
4 Daily.hos	
Delete Communications History File	
Exit	

New Report Set: This option allows you to define a new report set. All of the report settings will be cleared when this option is selected. You will be prompted to save your current report set if appropriate.

Open Report Set: This option allows you to open a previously saved report set. You will be prompted to save your current report set if appropriate.

Save Report Set: This option allows you to save the current settings. The current report set name will be used. If you have not selected a report set name, you will be prompted for one.

Save As: This option allows you to save the current settings with a different report set name. The system will prompt you for a report set name.

Print Set Definition: This option allows you to print out the current settings for this report set. The printout will include the report set description, the selected reports, the output options and the scheduling options.

1-4: The system will list the last four report sets that you have worked with. This is referred to as the frequently used files list.

Delete Communications History File: This option removes the detailed history file created during the communication process. The file name is HOLOG.TXT.

Exit: Closes WinSen Home Office. You will be prompted to save your current report set if appropriate.

Maintenance

Site Setup: Use this option to configure the program. You may change the modem settings, default printer and e-mail settings with this option.

View Communications History: Use this option to view the recent communication operations. Error messages will be included if the system had problems with e-mail or modem to modem operations.

Help
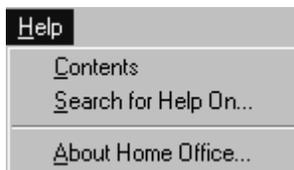
Contents: View the contents of the on-line help file. You may also press "F1" at any time for context-sensitive help.

Search for Help On: Search the contents of the on-line help file.

About Home Office: This option will show you the WinSen version number and other information.

Initial Setup

Before using the program to generate report sets, you should configure the software using the Site Setup option on the Maintenance menu. Selecting this option will display the following dialog:

The individual options are described below:

Modem Settings

Modem: From the drop down list, select the modem that Home Office should use to communicate with the home office. All installed modems will be shown; select the proper one from the list.

The dropdown list will also show the installed COM ports on your PC. Normally, you should select a modem rather than a COM port, but in certain cases it may be necessary to select the COM port to which the modem is attached.

If a modem is selected, the program will use TAPI (the Windows Telephony Application Programmer's Interface) to communicate with the modem. Windows will take care of all modem initialization, port parameters, and communications. In this case, the following two options are disabled because they are handled by Windows.

If a COM port is selected, the program will communicate directly to the modem via the selected COM port. In this case, you will also need to configure the following two options.

Port Parameters: Enter the baud rate, parity, data bits and stop bits for the serial port. The normal value is 57600,n,8,1 meaning 57600 baud, no parity, 8 data bits and 1 stop bit. Faster modems may support higher baud rate settings. The other parameters are usually the same.

Init. String: Enter the initialization string required to put your modem into auto-answer mode. The default string is "atz|~atx4|" which sets the modem to its default state and enables extended result codes. It is assumed that the default state for the modem is to answer the phone after one ring. If this is not the case, add an "~ats0=1|" to the initialization string.

Default Printer

Default Printer: Select the printer that you want to use when printing reports. You may change this printer when actually defining the report set.

E-mail Settings

Dial-Up Networking: If you are accessing the Internet via dial-up networking, select or type in the name of the dial-up networking connection that you will be using. You will also need to enter the user name and password for your dial-up account. The list of dial-up networking connections that are defined for your computer will be shown in the drop-down list. To configure your dial-up networking connections, click on the Start button and select **Control Panel|Network Connections.** You should have a functioning connection with your ISP and be able to send regular e-mail before you try to send messages with WinSen Home Office. If you have a direct connection to the Internet, leave this field blank and the system will connect to your ISP via the direct connection.

User Name: Enter the user name provided by your ISP. Some ISPs use case sensitive systems so make sure the user name is entered exactly as it is shown on the information received from the ISP.

Password: Enter the password provided by your ISP. Some ISPs use case sensitive systems so make sure the password is entered exactly as it is shown on the information received from the ISP. Only asterisks will appear in the field but the correct password will be stored.

Outgoing Mail Server: Enter the name of the outgoing (SMTP) mail server. Your ISP typically provides you with this information or you may look at the configuration for your current mail software.

Incoming Mail Server: Enter the name of the incoming (POP3) mail server. The address may be the same as the outgoing server (SMTP) address. Your ISP typically provides you with this information or you may look at the configuration for your current mail software.

E-Mail Address: An e-mail address should be specified so that the system can fill in the "from" address when sending e-mail.

Profile Name: You may specify a profile if you have multiple profiles defined on your system. Profiles are defined through the mail option in the Control Panel. To determine whether there are any profiles defined on your computer click on the Start button. Then select **Settings|Control Panel|Mail.**

Mail System: This dropdown list allows you to use different mail systems. The default protocol is normally Internet/SMTP. If MAPI is selected, the system uses functionality in the default email client on the machine to send email.

Other information

Last Upload: The system records the date and time of the last transfer to the main office when you are using the e-mail option or the modem to modem connection option.

**Upload Count:** The system tracks the number of transfers to the main office when you are using the e-mail option or the modem to modem connection option.

Site Number: Enter the number of the site. This should correspond to the site number defined at the main office.

Defining a Report Set

Defining a report set requires several steps, which are outlined below. An example of the program screen is also shown below.
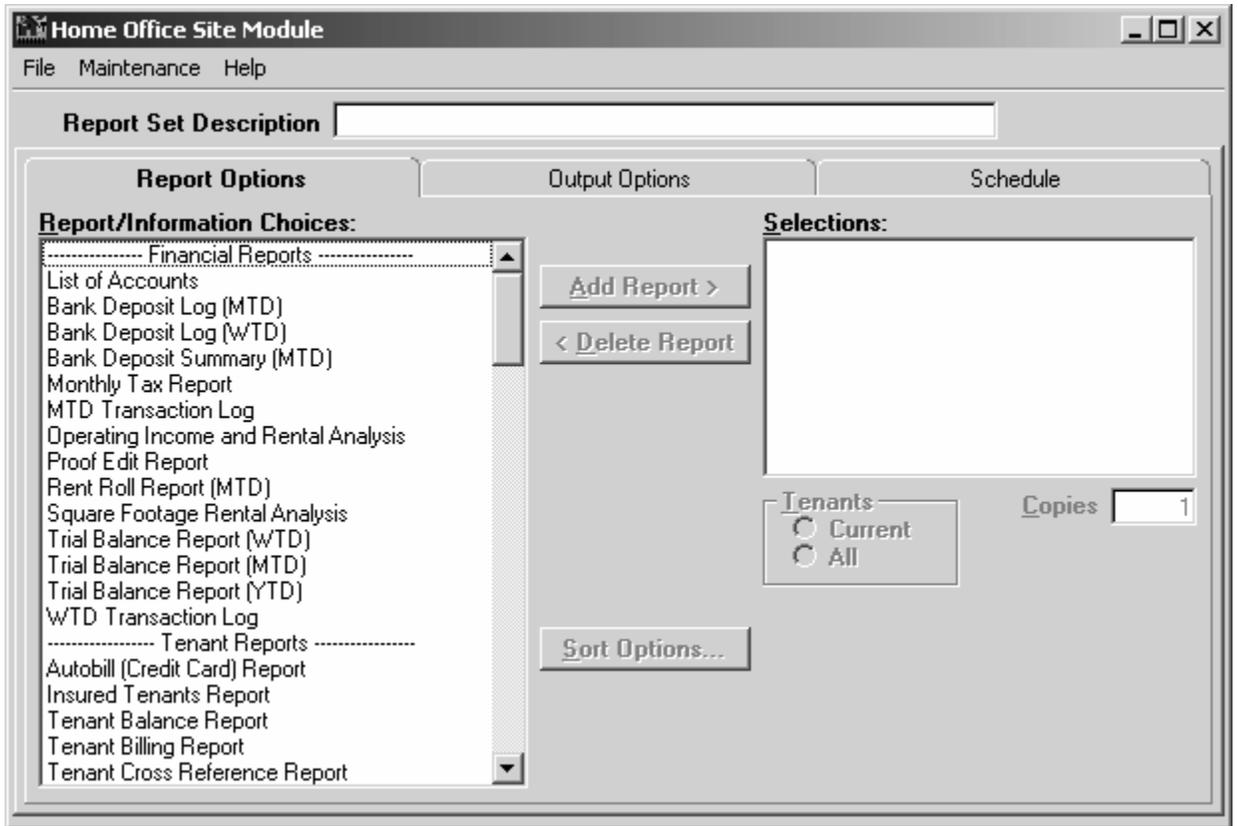
1. Select the **File|New Report Set** option to clear any report settings.

2. Enter a description for the report set in the Report Set Description field.

3. Select the reports and other information sources that you wish to include in the report set. This option is detailed in "Selecting Reports/Information Sources" on page 14.

4. Switch to the Output Options tab and select the appropriate option. Other fields may appear depending on the option that you select. See "Output options" on page 16.

5. Switch to the Schedule tab and select how often you wish the report to be generated and when it should first be generated. See "Schedule options" on page 17 for more information.

Selecting Reports/Information Sources

WinSen Home Office supports the same list of standard reports as WinSen Property Manager. This list will be displayed on the left side of the Report Options tab as shown below.
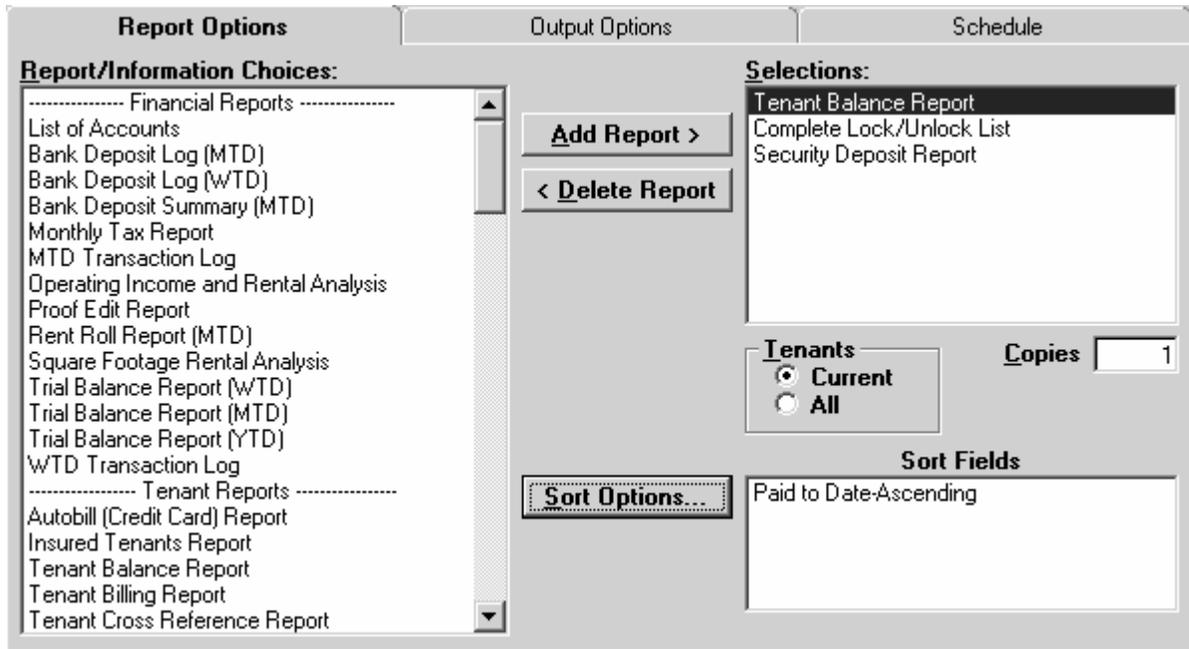
To add a report to the report set, find the report name in the list of reports and highlight it by clicking on it with the mouse. You may also use the arrow keys to move up and down in the list. Once the report name is highlighted, click on the Add Report button. You may also double-click on the report name to automatically add it the selections.

In addition to the standard reports, there are other reports and options displayed in the list of choices. You may select the last daily close, the last weekly close, the last monthly close, the last quarterly close and the last yearly close. The individual reports included in the closes are determined by the report selections made in End of Period processing. See the WinSen Property Manager manual for more information on selecting closing reports. Because of the way the system stores reports before they are sent, you should only have one of the closing reports in a report set if you are sending reports via e-mail or modem. You may also choose to transmit the database files that WinSen uses. As you might expect, transmitting the database files will only work if you are using the e-mail option or the modem to modem connection.

You may also define a number of parameters for each report in the selection list. The first parameter is the type of tenant: current or all. This works in the same manner as the selection on the WinSen Property Manager report menu. Selecting Current will include only current tenants; selecting All will include all tenants (past and present). The next parameter is the number of copies. This allows you to print multiple copies of a report. You will also be able to select individual sites if you are using the multiple site version of WinSen (this is not shown in the dialog above). The last parameter is Sort Options. WinSen Home Office has the same sort capabilities as WinSen Property Manager. Clicking the Sort Options button will present the following dialog.

Sort Options
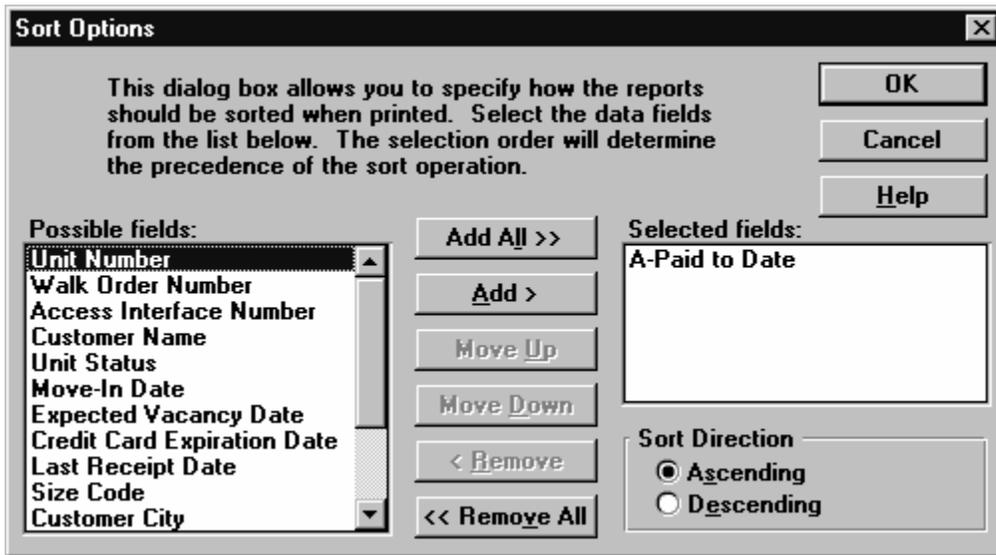
Possible and Selected Fields Boxes

Possible Fields box: These are the fields that are not currently chosen for a sort key.

Selected Fields box: These are the fields that have been chosen for sort keys. In the example, The "A" in front of the selected field designates that it has been chosen to be sorted in ascending order, while "D" would indicate a descending sort.

To make a selection in one of the boxes, click on it with your mouse. Then select one of the buttons to perform an operation on that field as explained below.

Action Buttons

Add All button: This button will move all selections from the Possible fields box to the Selected fields box. This option is not recommended, since sorting on more than two sort keys will usually not have much effect.

Add button: This button will add the currently highlighted selection in Possible fields to the Selected fields box. It will be added to the bottom of the list in the Selected fields box.

Move up button: This button will move the currently highlighted selection in Selected fields up one position in the list. This button and the Move down button allows you to select the order of precedence for the sort operation.

Move down button: This button will move the currently highlighted selection in Selected fields down one position in the list.

Remove button: Moves the currently highlighted selection in Selected fields to the Possible fields box (deselects that option).

Remove all button: This button will move all selections from the Selected fields box to the Possible fields box. Thus, no sorting would occur.
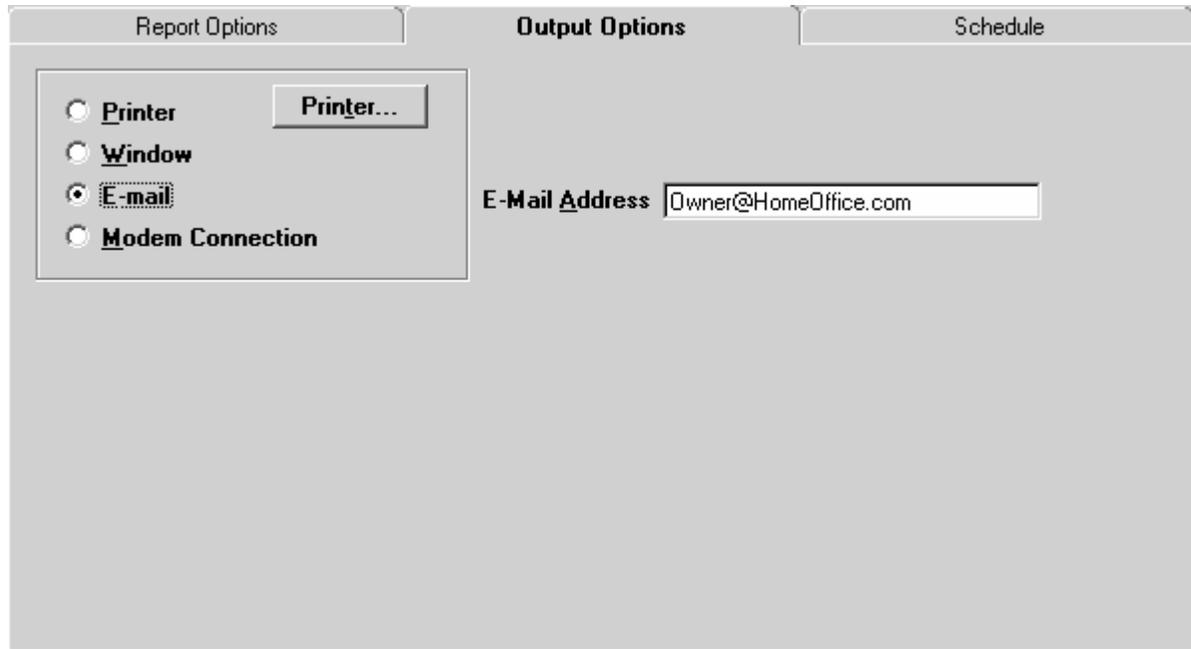
Sort Direction

Choose Ascending or Descending to sort the currently selected field in ascending (A to Z) or descending (Z to A) order.

OK Button

Choose OK to save your sort selections and return to your previous dialog box.

Output options

This tab allows you to define how you want the reports generated. The four options are as follows:

- Printer

- Window

- E-mail

- Modem Connection.

Selecting the first option (Printer) tells the system to print out the selected reports. You may specify the printer that you wish to use by clicking on the Printer button. This is detailed in "Select Printer Dialog Box" on page 6.

Selecting the second option (Window) will display the report(s) in a window. This is normally used for testing purposes.

Selecting the third option (E-mail) will display an e-mail address field for entering the e-mail address of the main office. The e-mail address should conform to the format used by your mail system. Internet addresses are normally in the following format: username@providername.

Selecting the last option (Modem Connection) will display a check box labeled "Wait for connection after generating set". If this box is checked, the system will initialize the modem and wait for the main office computer to call in. If the box is not checked, then the system will generate the report files, compress them, and leave them in the HOSite sub-folder. The file will be uploaded the next time that the main office computer makes a modem connection with the site. This option is normally checked.

Schedule options

The schedule tab allows you to specify when the report set should be generated. There are six options: on demand, daily, weekly, monthly, quarterly, and yearly. If you select the first option, the Generate Reports button will be enabled and you may click on the button to generate the reports. If you select one of the other options, the next date and time fields will be enabled and you may enter information in these fields. The example below shows a report set that is scheduled to print daily. It will be generated next on April 6th, 2005 at 6:00 p.m.
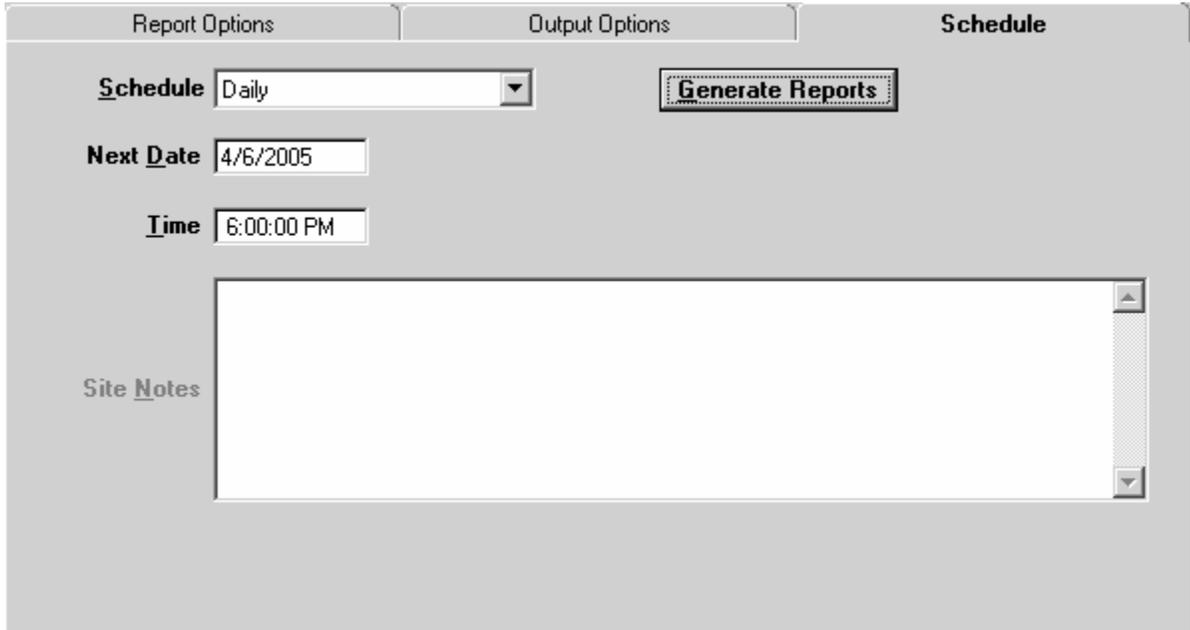
Report Options	Output Options	Schedule

Schedule [Daily ▾]   [**Generate Reports**]

Next **D**ate [4/6/2005]

Time [6:00:00 PM]

Site **N**otes [   ]

The last field on this tab is labeled Site Notes. This field is disabled unless the **Schedule** is set to **On Demand**. The manager would use this field to send a text message to the main office. This message could include special circumstances about today's reports or other information that is relevant to this particular report set. These notes are not saved with the report set. They are meant to be entered each time you generate the reports. If you are using the WinSen Home Office Scheduler to generate report sets, create a file called HOSNotes.txt with the message that you would like to send to the Home Office.

Attaching other files

It is possible to attach other files to the packet of information sent by the site to the main office via e-mail or modem. Create a text file called HOSFiles.txt in the \WinSen folder. List the file names of the files that you would like transferred to the main office. For example, if you wanted to send the file named reminder.txt from the \Windows folder, you would have one line in the HOSFiles.txt file that reads C:\Windows\reminder.txt. You may also specify wildcards in the name (e.g. C:\Windows*.txt). List one file name or specification per line. You must use short file names for this operation to work correctly.

Manually Generating a Report Set

After a report set has been defined, you may manually generate the report set by opening the set with the Site Module. Select the **File|Open Report Set** option and pick the report set from the list. Click on the OK button and the system will display the information from the report set. Switch to the

Report options tab and make sure that the correct reports are selected. Next, switch to the Output options tab and make sure that the correct option is selected. Finally, switch to the Schedule tab and change the Schedule option to "on demand." This will enable the Generate Reports button. Click on this button and the system will start to generate the report set. The system will display various progress dialogs as it generates the reports. This information will also be stored in the communications history log and may be viewed using the **Maintenance|View Communications History** option as discussed on page 18.

Viewing the Communications History

The system maintains a history log file containing the results of the communications activity. You may view this information by selecting the View Communications History option on the Maintenance menu. Each line of the file has date and time information as well as the activity that took place. You may use this information to ascertain the time required for certain operations or for troubleshooting purposes.

Using the Scheduler

If you have already defined the report sets that you wish to generate, you may start the WinSen Home Office Scheduler to automatically process those report sets at the scheduled time. Start the Scheduler by clicking on the Start button and then clicking on Programs|WinSen|WinSen Home Office Scheduler. The program will start and display the following dialog:
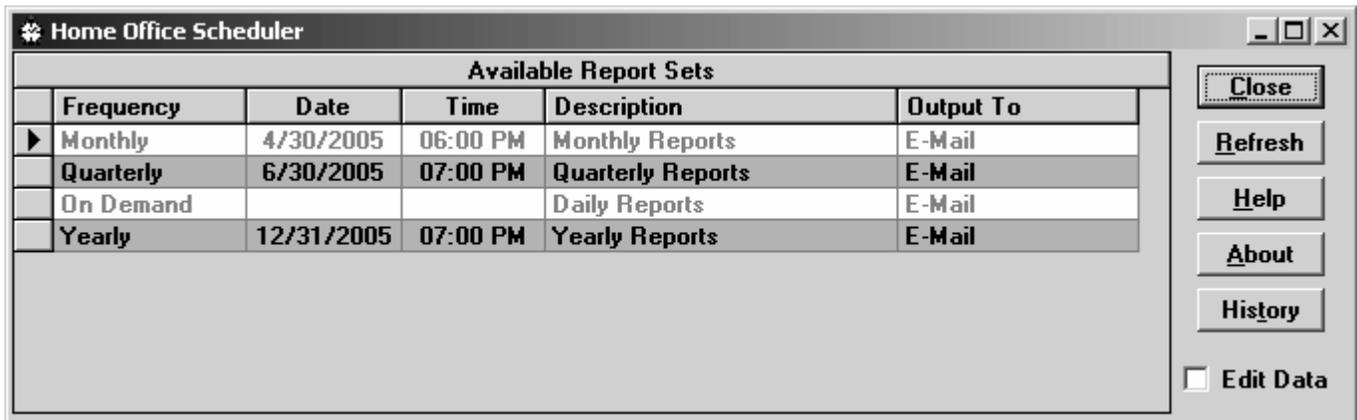
The list will contain information about each report set that you have defined including how often the set is scheduled, the date and time that the set will next be generated and the description of the report set. If you are getting ready to leave your computer, take a glance at the scheduled dates and times for the report sets to insure that the report set that you wish the system to generate is configured properly. You may minimize this window if desired.

There are also a number of buttons on the right side of the dialog. The close button will shut down the scheduler. The refresh button will re-read the report sets that exist in the current folder (typically C:\WinSen). You would use this button if you have just changed the configuration of a report set with the Site Module. The help button will display the on-line help. The about button will display the program version information and the history button will display the recent communication operations. Error messages will be included if the system had problems with e-mail or modem to modem operations.

Checking the **Edit Data** box allows you to modify the frequency, date, time, and description of the report sets without opening the Home Office Site Module.

When the scheduled date and time for a report set occurs, the system will read the report set definition and start to generate the reports. If "printer" was selected as the output option of the report set, then the reports will be sent to appropriate printer. If "e-mail" was selected as the output option, then the files will be compressed and attached to an e-mail message. The system will use the dial-up networking and e-mail parameters to send the e-mail. If "modem connection" as selected as the output option, then the files will be compressed and stored in the HOSite sub-folder. If the "wait for connection after generating set" option was checked, then the system will initialize the modem and wait for the main office to call in and retrieve the compressed file. The compressed file will be removed after it is sent successfully to the main office. If the "wait" option is not checked, then the systems leaves the compressed file in the HOSite sub-folder until it makes a connection with the main office.

The system will display various status messages as it proceeds through the communications process. These messages are also logged in the log file and may be viewed by pressing the history button.

Operation at the Main Office

Introduction

The WinSen Home Office Main module is designed to receive information from remote facilities and store the information for later manipulation. The information is sent to the main office via an e-mail account or via a direct modem to modem connection.

If you are using the e-mail option, the computer at the main office will be set up to automatically retrieve the e-mail on a regular basis. Reports and data sent by the facilities are retrieved and stored on the computer. Because the information is compressed before being sent, it requires less space on the computer. The information may then be viewed, printed, or extracted.

If you are using the modem option, the computer at the main office will be set up to automatically dial all the configured sites at a pre-defined time (for example, in the middle of the night when phone rates are lowest) and download the reports and data generated in advance at the storage facility as explained below. Since the site computer compresses the reports, download times are reduced considerably.

Organization of the Menus

The following is the organization of the menus for the WinSen Home Office Main Module and a brief explanation of each menu selection. The various options will be explained in detail later in this section.

File
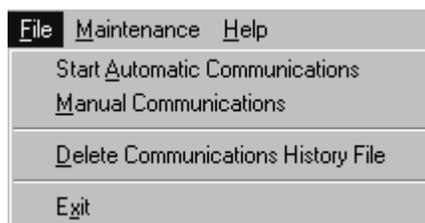
Start Automatic Communications: If your sites are configured for e-mail, this option will cause the system to download e-mail for the facilities. If your sites are configured for direct modem to modem communications, it will cause the system to dial each site via modem and download the reports and data.

Manual Communications: This option is similar to automatic communications but allows the operator to selectively choose facilities with which to communicate.

Delete Communications History File: This option removes the detailed history file created during the communication process. The file name is HOLOG.TXT.

**Exit**: Closes WinSen Home Office.

Maintenance

Maintenance
> Home Office Setup
> Configure Remote Sites
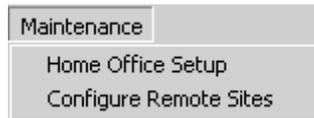
Home Office Setup: Use this option to configure the program. You may change the modem settings, default printer and e-mail settings with this option

Configure Remote Sites: This option allows you to specify details about your individual sites including site number, phone number, e-mail status, etc.
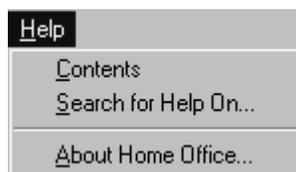
View

View
> Communications History File
> Clear History Window
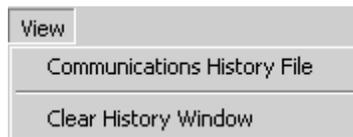
Communications History File: Use this option to view the detailed history file created during the communication process. Error messages will be included if the system had problems with e-mail or modem to modem operations.

Clear History Window: Clears the communications history window on the Communications tab.

Help

Help
> Contents
> Search for Help On...
> About Home Office...

Contents: View the contents of the on-line help file. You may also press "F1" at any time for context-sensitive help.

Search for Help On: Search the contents of the on-line help file.

About Home Office: This option will show you the WinSen version number and other information.

Home Office Setup

Before using the program to retrieve report sets, you should configure the software using the Home Office Setup option on the Maintenance menu. Selecting this option will display the following dialog:

The individual options are described below:

Modem Settings

Modem: From the drop down list, select the modem that Home Office should use to communicate with the remote site(s). All installed modems will be shown; select the proper one from the list.

The dropdown list will also show the installed COM ports on your PC. Normally, you should select a modem rather than a COM port, but in certain cases it may be necessary to select the COM port to which the modem is attached.

If a modem is selected, the program will use TAPI (the Windows Telephony Application Programmer's Interface) to communicate with the modem. Windows will take care of all modem initialization, port parameters, and communications. In this case, the following two options are disabled because they are handled by Windows.

If a COM port is selected, the program will communicate directly to the modem via the selected COM port. In this case, you will also need to configure the following two options.

Port Parameters: Enter the baud rate, parity, data bits and stop bits for the serial port. The normal value is 57600,n,8,1 meaning 57600 baud, no parity, 8 data bits and 1 stop bit. Faster modems may support higher baud rate settings. The other parameters are usually the same.

Init. String: Enter the initialization string for the modem. The default string is "atz|~atx4|" which sets the modem to its default state and enables extended result codes.

Default Printer

Default Printer: Select the printer that you want to use when printing reports. You may change this printer when actually printing the report set.

E-mail Settings

Dial-Up Networking: If you are accessing the Internet via dial-up networking, select or type in the name of the dial-up networking connection that you will be using. You will also need to enter the user name and password for your dial-up account. The list of dial-up networking connections that are defined for your computer will be shown in the drop-down list. To configure your dial-up networking connections, click on the Start button and select **Control Panel|Network Connections.** You should have a functioning connection with your ISP and be able to retrieve regular e-mail before you try to retrieve messages with WinSen Home Office. If you have a direct connection to the Internet, leave this field blank and the system will connect to your ISP via the direct connection.

If you leave some of the following settings blank, the system will prompt you for them as it proceeds with the e-mail connection. You can use this method to try different entries for one field while troubleshooting your connection.

User Name: Enter the user name provided by your ISP. Some ISPs use case sensitive systems so make sure the user name is entered exactly as it is shown on the information received from the ISP.

Password: Enter the password provided by your ISP. Some ISPs use case sensitive systems so make sure the password is entered exactly as it is shown on the information received from the ISP. Only asterisks will appear in the field but the correct password will be stored.

Outgoing Mail Server: Enter the name of the outgoing (SMTP) mail server. Your ISP typically provides you with this information or you may look at the configuration for your current mail software.

Incoming Mail Server: Enter the name of the incoming (POP3) mail server. The address may be the same as the outgoing server (SMTP) address. Your ISP typically provides you with this information or you may look at the configuration for your current mail software.

E-Mail Address: This does not need to be filled in at the home office.

Profile Name: You may specify a profile if you have multiple profiles defined on your system. Profiles are defined through the mail option in the Control Panel. To determine whether there are any profiles defined on your computer click on the Start button. Then select **Settings|Control Panel|Mail.**

Mail System: This dropdown list allows you to use different mail systems. The default protocol is normally Internet/SMTP. If MAPI is selected, the system uses functionality in the default email client on the machine to send email.

Configure Remote Sites

The Configure Remote Sites dialog is used to add, edit, and delete remote facilities in the Home Office database. This form allows you to enter communications information for each site that is using the Home Office Program. Choose **Maintenance|Configure Remote Sites** to display the following dialog:

Data Control Bar: This portion of the form allows you to change the record number currently being edited. Use your mouse to click the buttons and perform the following actions:
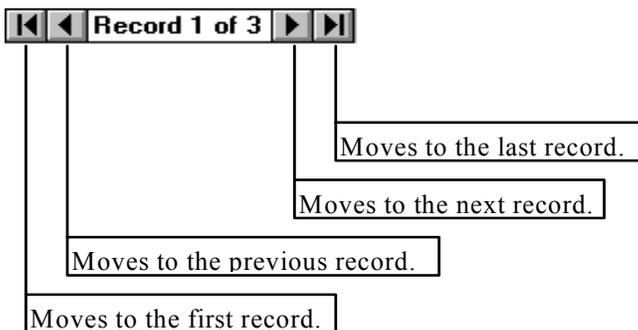
Site ID: This value will be assigned automatically by the program as soon as you save the new record, and cannot be edited. When configuring the WinSen Home Office software at a facility, the Site ID should be entered in the Site Number field. The Home Office software uses this information to store received report sets in the correct folder.

Site Name & Address: Fill in the name of the remote site. If desired, fill in the site address fields as well. The Home Office software does not currently use the address fields.

Active Site: This checkbox designates that the site is active. If checked, the site will be included in the communication process. If not checked, the site will not be included in the remote communications routines but will be included in the report menu. One situation where this would be useful is if you have sold the site but do not wish to delete the information pertaining to the site. Another scenario might be where you wish not to include the site in the communications process temporarily due to communications difficulties, power failure, etc.

Communications Information

Phone Number: Enter the phone number of the modem line at the remote facility. This number is only used if you are using the modem to modem connection method.

E-mail only: Check this box if you are going to receive report sets from this site via e-mail.

Voice Number: Enter the phone number of the facility. This is for your information. The Home Office software does not currently use the voice number field.

Last Download: The system records the last time information was received from this facility.

Adding a new Site

Begin by pressing the **Add** button. It will change to an **Update** button, which you will press to save your changes after entering your data. Complete all of the fields as shown above.

Editing or Deleting existing Sites

First select the correct record using the Data Control Bar.

If you want to edit the site information, merely make any necessary changes and press the Close button to save your changes and exit.

To delete the site, press the **Delete** button. The system will confirm your choice by asking "Delete this site - are you sure?". Choose "Yes" to delete the site.

Receiving Report Sets

Manual Communications

You may use this option to individually communicate with each of the sites. The system will display the following dialog:
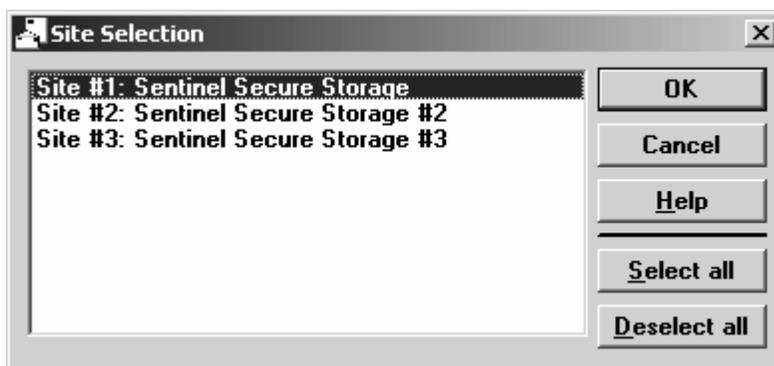
Select the sites with which you want to communicate and then click the OK button.

If you are using the e-mail option, the system will retrieve all e-mail from the ISP which has the characters "Site #" in the subject of the message. Any other mail will be left in the mailbox. The system will store the retrieved e-mail in the appropriate sub-folder based on the site number. Mail from site #1 will be stored in a sub-folder called Site01; mail from site #2 will be stored in a sub-folder called Site02, etc.

If you are using the modem to modem option, the system will call each site in turn and try to retrieve the pending report sets. If the site does not answer or if the download is unsuccessful, the system will try up to 5 times to retrieve the information. The system will store the retrieved files in the appropriate sub-folder based on the site number. Files from site #1 will be stored in a sub-folder called Site01; mail from site #2 will be stored in a sub-folder called Site02, etc.

The system will display various progress dialogs as it retrieves the reports. This information will also be stored in the communications history log and may be viewed as detailed in the "Viewing the Communications History" on page 18.

Automatic Communications

Use this option to automatically retrieve e-mail or files from your remote facilities in the manner described above. The system will communicate with each site that is marked as an active site. E-mail or files will be downloaded and stored in the appropriate sub-folder based on the site number.

You may also configure the system to start automatic communications by entering the start date and time on the communications tab as shown below.
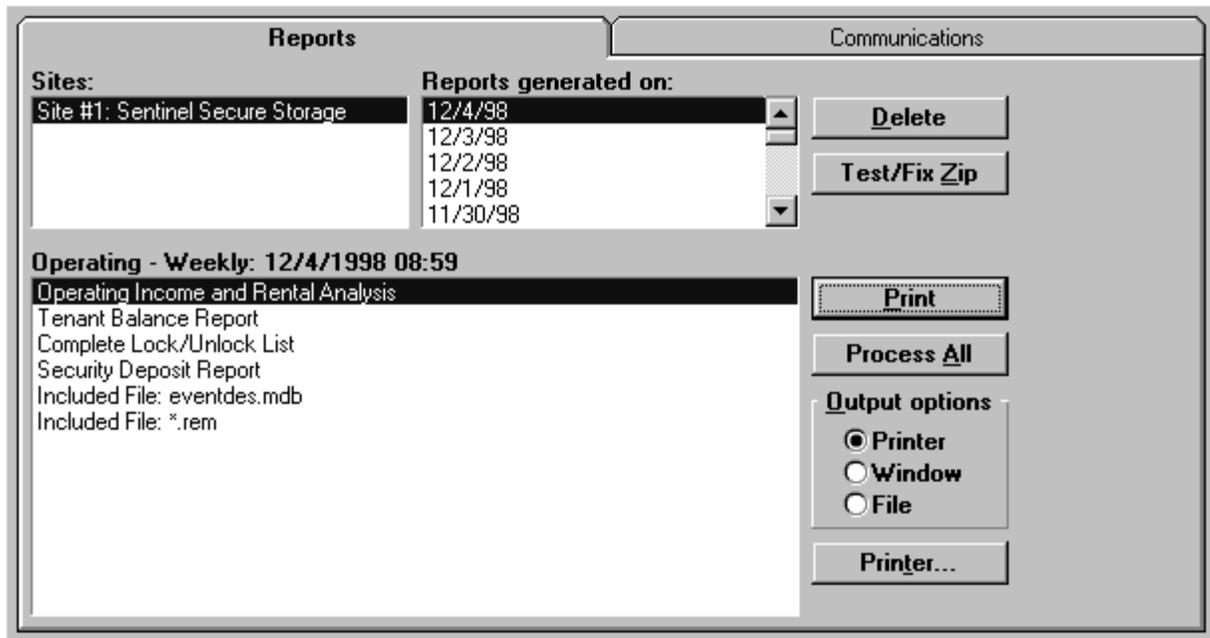

If the WinSen Home Office Main module is running when this date and time are reached, then the system will start an automatic download process.

Viewing Report Sets

After you retrieve a report set, it will be included in the list on the Reports tab as shown below.

You may now manipulate the information that was sent by the site. First, select the proper site from the list of sites. When you click on the site, the system scans all of the files in the sub-folder that corresponds to that site. It then displays a list of report sets. Click on the date of the report set in which you are interested. When you click on the date, the system reads the table of contents of the compressed report set and displays a list of the reports and other information contained in the set. This list is displayed in the large window towards the bottom of the dialog. There are also several buttons that are used to process the files of the report set. They are explained below.

Delete

If you no longer need a report set, you may delete it. First, select the date of the report set in the "Reports generated on:" list. Then click on the Delete button. The system will confirm that you wish to delete the report set.

Test/Fix Zip

If a compressed report set becomes corrupted, you may use this option to attempt to repair it. First, select the date of the report set in the "Reports generated on:" list. Then click on the Test/Fix Zip button. The system will check the compressed files for problems. If a problem is detected, you will be asked if you want to repair the problem. Answer yes and the system will attempt to repair the corruption. Only certain problems can be repaired.

View - Print - Extract

Depending on the item that you have highlighted, the caption on this button will change. If you have a text file highlighted, such as the site notes, the caption on the button will be View. Clicking on the button will let you view the text file. If a report is highlighted, the caption on the button will be Print. Clicking on the button will print the report file. You may also send the report to a window or a file by changing the output options. If an included file is highlighted, the caption on the button will be Extract. Clicking on the button will extract the included file to the appropriate Site sub-folder.

Process All

Clicking on this button will step through each of the individual items contained in the report set and process them. If the item is a text file, it will be displayed. If the item is a report file, it will be printed according to the output options. If the item is an included file, it will be extracted to the appropriate Site folder.

Output options

You can choose to have the report printed to your Printer, to a Window, or to a file by clicking the appropriate choice.

- **Output to Printer:** The report will be sent to the currently selected printer. To change the destination printer, choose the "Printers" button and the Printers dialog box will appear. For more information on the Printers dialog box, see "Select Printer Dialog Box" on page 6.

- **Output to Window:** The report will be printed to a window. After the window appears, allowing you to view the report on the screen, you will have a number of options. For information on these options, see "Report Viewing " on page 8.

- **Output to File:** The report will be printed to a file. The information is stored in comma delimited format in a file with the extension ".csv". For more export options, select the Window option and use the export button.

Use this option to specify how to print a report. If the Printer option is selected, the report will be printed to the selected printer. If the Window option is selected, the report will be sent to a window for viewing. You may also use this option to take advantage of the wide range of export options supported by the Crystal Reports engine. If the File option is selected, the report will be

Printer

This button allows you to change the destination printer as detailed in "Select Printer Dialog Box" on page 6.

Viewing the Communications History

The system maintains a history log file containing the results of the communications activity. You may view this information by selecting the View Communications History option from the View menu. Each line of the file has date and time information as well as the activity that took place. You may use this information to ascertain the time required for certain operations or for troubleshooting purposes.

Appendices

Appendix A - Mail Clients & Protocols

WinSen Home Office uses the IDSMail™ OLE server to provide e-mail functionality and will be distributed with the 32-bit IDSMail™ system unless otherwise requested. Currently, the system supports the following mail clients/protocols:

Mail Client	Protocol	Comments
Banyan Blue Mail	VINES	All versions. 16-bit IDSMail™ only.
BeyondMail	VINES/MHS	All versions. 16-bit IDSMail™ only.
cc:Mail	VIM	cc:Mail v2.x min.
DaVinci	MHS	All versions. 16-bit IDSMail™ only.
E-mail Connection	SMTP/POP+	All versions
Emissary	SMTP/POP	All versions
Eudora	SMTP/POP	All versions.
Exchange	MAPI	All versions
GroupWise	MAPI	16-bit IDSMail™ works with v4.x only. 32-bit IDSMail™ works with v5.x and up.
Lotus Notes	VIM	32-bit IDSMail™ works with 32-bit Notes
Microsoft Mail	MAPI	All versions
Microsoft Internet Mail	SMTP/POP	All versions
Netscape Mail	SMTP/POP	All versions
Outlook, Outlook Exp.	MAPI/SMTP/POP	All versions. (Version 8.01 or higher is required to use Active Messaging.)
Pegasus (for MHS version)	MHS/SMTP/POP	Use only 16-bit IDSMail™ for Pegasus MHS. Pegasus SMTP/POP3 can be accessed via either.
Pronto	SMTP/POP	All versions
RUMBA Mail	MAPI	All versions
Shark!Mail	VINES	All versions. 16-bit IDSMail™ only.
Spry Mail	SMTP/POP	All versions
Z-Mail	SMTP/POP	All versions

Here is a list of mail systems known to be incompatible with WinSen Home Office and IDSMail™:

Mail Client	Comments
America OnLine (AOL)	Proprietary protocol.
CompuServe	If CompuServe MAPI driver is installed, IDSMail™ MAY work in that way. Initial testing revealed that the CompuServe MAPI driver is buggy, hence this is not officially supported.
Prodigy	Proprietary protocol.
IBM Profs	Proprietary protocol.

S

Select printer 6

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