MultiSite for *Windows*

User Manual

Version 7.0

Mind LTD.

Ver. 01

PN - PB5220

Table of Contents

INTRODUCTION **1**

MAIN SCREEN **3**

STATUS 4
LAST CALL 4
NEXT CALL 4
SYSTEM MENUS 5
Site Menu *5*
Configure Menu *5*
View Menu *5*
Help *5*

WHAT IS A SITE? **6**

GET DATE 6
UPDATE SITE 6
NEW SITE 6
General *7*
Connection *9*
Communication *10*
DELETE A SITE 12

CONFIGURE **13**

MODEM 13
Predefined Modems *15*
PARAMETERS 15
BLOCK CALLS 17
CURRENCIES 17
Adding New Currencies *18*
Updating Currencies *19*
Deleting Currencies *19*
Viewing and Editing Other Months *20*

VIEW **21**

SORT 21
Custom *21*
By Name *21*

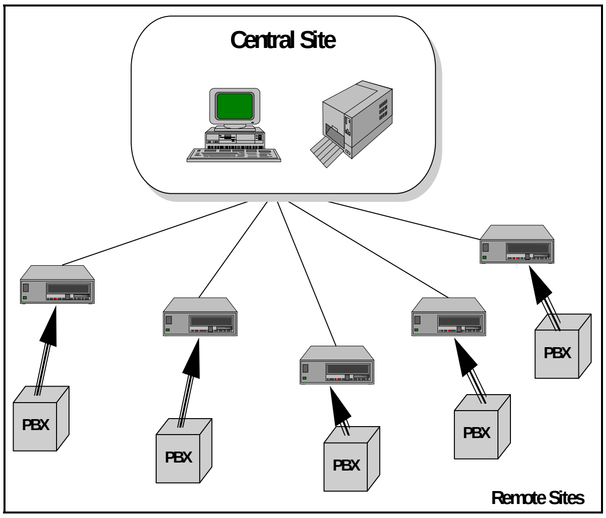
By Status *21*
Last Call *21*

HELP **22**

INDEX **23**

Introduction

The PhonEX MultiSite system is an integrated call management solution for businesses that have more than one location (site). Typically each site in the organization has its own PABX (sometimes more than one). These sites are connected to one central system where all call data is concentrated. This master system may also be directly connected to a PBX. An example of such a system is a bank, that has branches in a number of locations and would like to centralize the telemanagement of all of the branches, to one central branch.



The master system uses fully parametric polling to remote locations. MultiSite allows the telecommunication manager to monitor and control all locations from one central location.

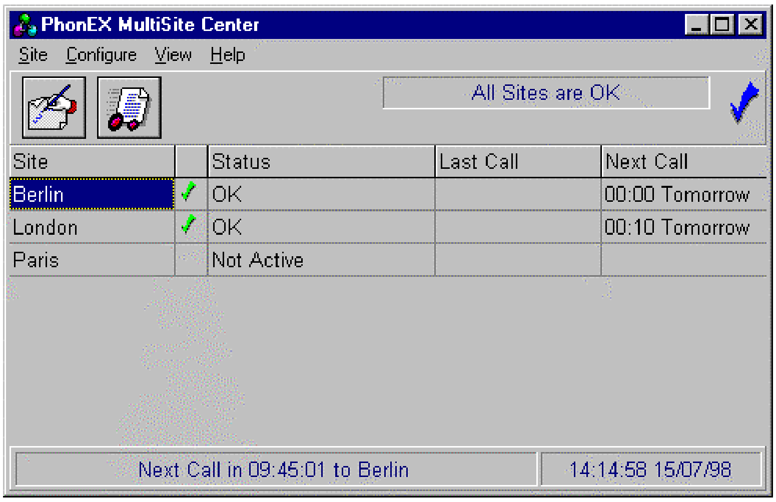
In the PhonEX MultiSite system, a Site is a remote site where the PhonEX program is collecting call data. The Center is a central location that communicates with and collects data from all the Sites.

The Center is scheduled to retrieve data from Sites at given intervals. You may configure these settings according to your needs.

The PhonEX MultiSite is easy to setup and use. Once data has been retrieved, you may apply queries, produce reports, and display data using all of the features available in PhonEX.

Main Screen

Once MultiSite is installed on the computer at the Center, the MultiSite program is initiated every time *Windows* is started. The main screen to the MultiSite Center is displayed. This is the main interface for the MultiSite Center. The Center displays the table of sites that has been defined for the system, each with their status. This main screen also provides easy access to the functions of the MultiSite program. The MultiSite main screen displays the menus, toolbar, status, and table of sites.



The main menu includes the following:

- Site menu
- Configure Menu
- View Menu
- Help Menu

The Table of Sites displays each site that has been defined on the system. Each site is described by its Status, Last Call field, and Next Call field.

Status

Each site has a status that describes the state of the communication between the site and the center. A site might have one of the following states:

Status	Explanation
OK	Communications are enabled and data is processed.
Failed	Last call to Site not completed (no answer, no connection, no data, no process).
Retry #	The last call did not connect to the site and will be retried. The retry number is displayed. When the retry number exceeds the Number of Retries, the status is switched to Failed.
Not Active	This site is not currently active. The Site may be activated via the Site - General Parameters dialog box.

Note A graphic representation of the status will appear next to this field, making it easy to identify sites of similar status.

If the entire list of Sites is highlighted yellow, then all calls have been blocked (Refer to Block Calls, page17).

Last Call

This displays the date and time of the last attempt to communicate with the site.

Next Call

This displays the date and time of the next attempt to communicate with the site.

System Menus

Site Menu

Use this menu to:

Menu Option	Description
Get Data	Retrieve data from the highlighted Site.
Update	Update the definition of the highlighted Site.
New	Create a new Site definition.
Delete	Delete the definition of the highlighted Site.
Exit	Close the MultiSite application.

Configure Menu

Use this menu to:

Menu Option	Description
Preferences	Define Modem Parameters and Preference Parameters.
Block Calls	Prevent any attempts to retrieve data from Sites.
Currencies	Define multiple currency settings

View Menu

Menu Option	Description
Sort	Use option to sort the list of sites listed in the Main screen.

Help

Use this menu to:

Menu Option	Description
Contents	Access the application’s Help file.
About	View the About information which includes the version number of the program.

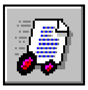
What is a Site?

A Site is a remote location where the PhonEX program collects call data. The MultiSite Center is the nerve center that communicates with and collects data from each of the Sites.

Data is collected in one of the following ways:

- At regularly scheduled intervals.
- Immediate request to Get Data.
- Direct connection to PBX

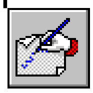
Get Date



You may retrieved data from a Site anytime you want, by simply highlighting the desired Site and pushing the Get Data icon. This will initiate the communication process between the Center and the Site. Once communication is established, new data will be retrieved from the Site and added to its data base located at the Center.

Once call data is retrieved, the list of Sites will be updated. If there are scheduled calls, they will be will resumed.

Update Site



The definition of each Site may be updated as required. First select the site to be edited. Select Update from the menu, by selecting the Update Site icon from the toolbar, or by pressing the right mouse button and choosing Update Site from the quick menu. Refer to New Site, page 6 for an explanation of these fields.

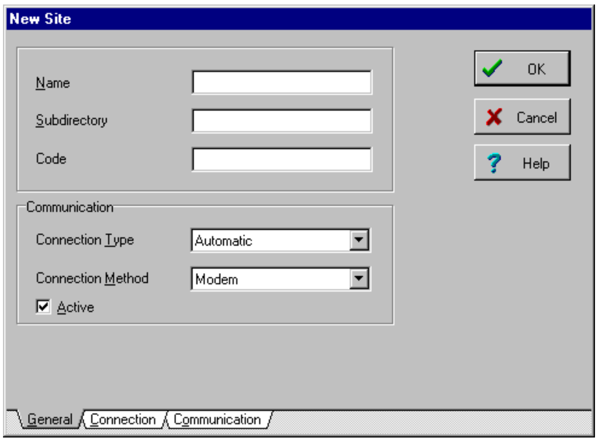
New Site

New Sites may be added to the system. A Site definition contains the parameters that define the name of the Site, how to call, and when to attempt to connect to the Site. Define a Site with the New command of the Site menu.

To define a new site, select New from the Site menu. The New Site dialog box will be displayed. You must configure the following:

- General
- Connection
- Communication

General
The General parameters include the name and target directory for the data.



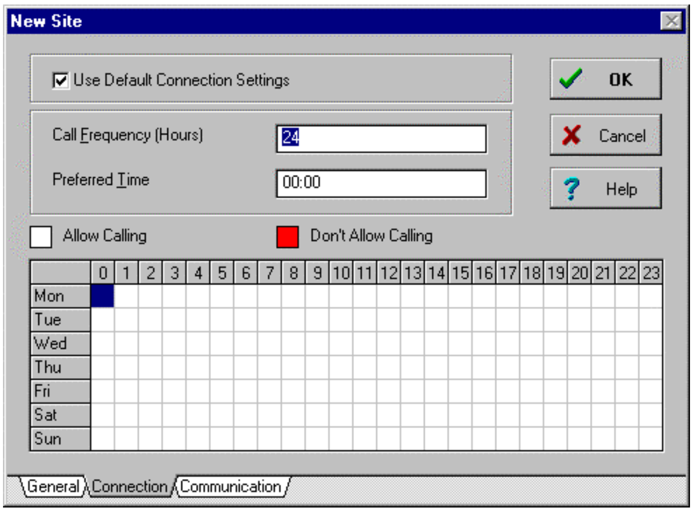
Fill in the following fields:

Field	**Explanation**
Name:	Site name.
Subdirectory:	Name of subdirectory in which the Site PhonEX system is installed (up to 8 character). This subdirectory must be located under the application directory.
Code:	Site code.
Connection	
Type	Automatic - The Center automatically calls the Site and processes the data.
	Manual - The user retrieves the data manually from the Site.
	Direct file - The Center retrieves the data automatically from a file.
	Direct PBX - Connected directly to the PBX. Data is received from the PhonEX line receiver.
Method	Modem - Connect to the remote site via a modem (telephone) connection according to the Modem Parameters.
	TCP/IP - Connect to the remote site via a TCP/IP layer (network).

	FTP - Connect to the remote site via an FTP (File Transfer Protocol) connection
Active	Status of the Site (Active, Disabled)

Connection

The Connection parameters describe the frequency and preferred times to retrieve data.



Fill in the following fields:

Field	**Explanation**
Frequency	Frequency of contact to the site in hours.
Preferred Time	Preferred time to contact the Site. This parameter is applicable only if the Frequency is 24 hours (or a multiple thereof).

You may specify times when not to make scheduled calls. Set the hours that the MultiSite Center should not call the sites by selecting the hours for each day of the week on the weekly table. Calls that are scheduled to occur during a “Don’t Allow Calling” time, are rescheduled to the beginning of the next hour. You may still manually Get Data even if the current time is marked no to allow calling.

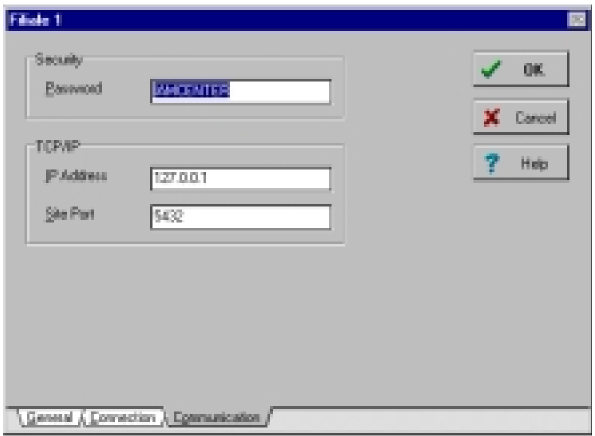
The table is arranged where each row is a different day of the week, and each column is an hour of that day. The hour will be marked in red to indicate that the site will not be called during that block of time for the given day. Hours marked in white indicate times that the site may be called to retrieve data.

Hours are marked using the mouse. A click on the table will toggle the select hour between Allow Calling and Don't Allow Calling. Additionally, you can select a block of time by dragging open an area on the table.

You may select a row by pressing the row label, or a column by pressing the column label. Rows and columns will toggle all of the hours based on the first hour in the selected part of the table.

Communication

The Communication parameters describe the connection settings that are specific to the given Site. The Communication dialog box displayed depends on the Connection Method selected in the General panel (refer to Connection (Type, Method), page 8). If you are connecting through a network (TCP/IP), the following dialog box is displayed:



Communication (for TCP/IP)

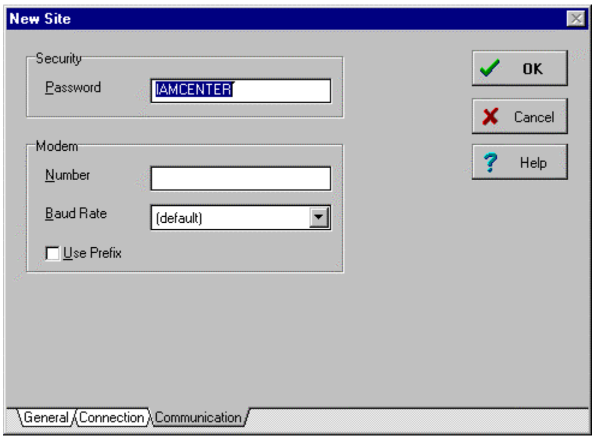
Fill in the following fields:

Field	**Explanation**
Password	The password for the Site. The password is not case-sensitive. This password must match the Site password or connection to the Site will not be enabled.

TCP/IP Settings

IP Address	Enter the network IP of the Site.
Site Port	Specify the port used by WinSite at the designated location.

If you are connecting to the site via a modem, the following dialog box is displayed:



Communication (for Modem)

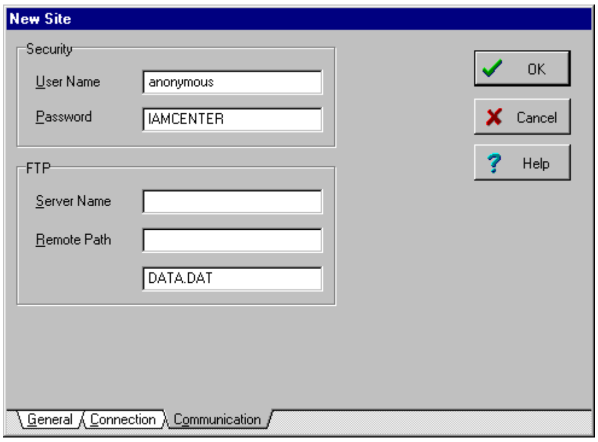
Fill in the following fields:

Field	**Explanation**
Password	The password for the Site. The password is not case-sensitive. This password must match the Site password or connection to the Site will not be enabled.

Modem Settings

Number	Enter the number to dial for the designated site.
Baud Rate	This setting is used to specify the Baud Rate (connection speed). Select Default to apply the standard Modem settings (refer to Modem, page 13). To override this setting, select the baud rate to be used with the designated site.

If you are connecting through an FTP connection, the following dialog box is displayed:



Communication (for FTP)

Fill in the following fields:

Field	**Explanation**
User Name	The user name for the FTP site.
Password	The password for the FTP site. The password is not case-sensitive. This password must match the FTP site password or connection to the FTP site will not be enabled.
FTP Settings	
Server Name	Enter the server name of the FTP site.
Remote Path	Type the remote path used at the designated FTP site.
	Type the file name to be downloaded.

Delete A Site

Delete a Site by selecting it and choosing Delete from the Site menu. The site and all of its relevant definitions will be deleted.

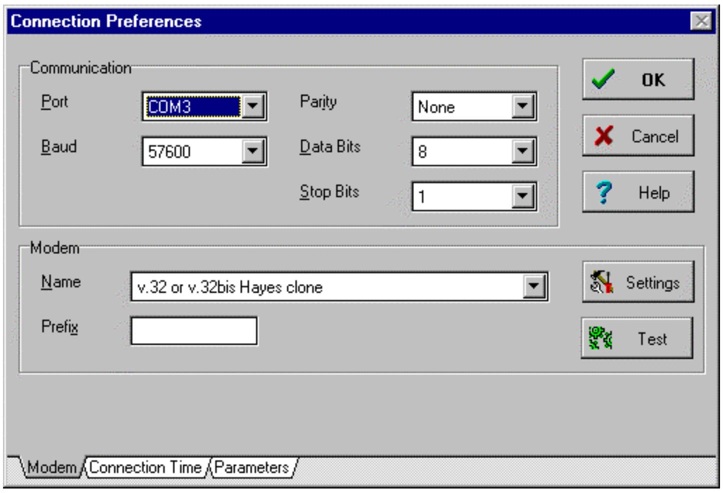
Configure

Define the following preferences which describe the mode of communication with the Sites.

- Modem
- Parameters

Modem

These modem settings describe the default settings to be used by the Center, unless otherwise specified.



Note The modem communication parameters must match those of the modem at the Site.

Fill in the following fields:

Field	Explanation
Port	The COM port of the Modem.
Baud	The speed of operation to be used.
Parity	The parity setting for the modem.
Data Bits	The data bits setting for the modem.
Stop Bits	The Stop bits setting for the modem.
Name	The type of Modem installed. If your modem doesn't appear select a compatible modem or define a new definition.
Modem	
Name	Enter the name of the modem being used by the Center.
Prefix	The prefix may be used when dialing a site. This feature is most often used in offices to obtain an outside line (i.e. 9,). The prefix is used in Sites that apply the Use Prefix option only.

Press the Settings button to modify, add, or delete a modem definition.

Press the Test button to perform a series of tests between the modem definition and the modem itself.

Test Modem

This function performs a series of tests that validates the integrity between the modem definition and the modem itself. The modem tests the following:

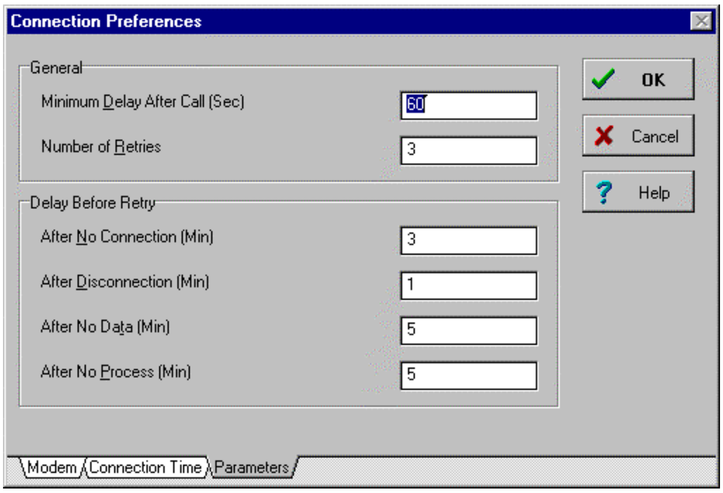
1. Is the selected COM port available?
2. Does the modem respond to initialization commands?
3. Does the modem respond properly to the selected configuration?

The test may display an error if there is a problem with one of these tests. This may indicate a problem with the port or with the modem definition. If the modem passes all of the tests, a message will be displayed.

Predefined Modems

The PhonEX MultiSite Center is stocked with a large number of modem definitions. Simply choose the modem that you have from the list, update an existing definition, or create a new definition for the modem at the Center.

Parameters



These parameters are connected to the frequency of communication and describe the MultiSite's handling of retries when a Site can not be properly reached.

Fill in the following fields:

Field	Explanation
Minimum delay After Call (Min)	The minimum delay in minutes between calls. Default is 1 minute
Number of Retries	The number of times to retry connecting to the Site before the status of the Site becomes Failed.
After No Connection (Min)	The minimum delay (in minutes) before a retry, after no connection failure.

Field	Explanation
After Disconnect (Min)	The minimum delay (in minutes) before a retry, after a disconnect failure.
After No Data (Min)	The minimum delay (in minutes) before a retry if no data is received.
After No Process (Min)	The minimum delay (in minutes) before a retry if data collected from a Site has yet to be processed.

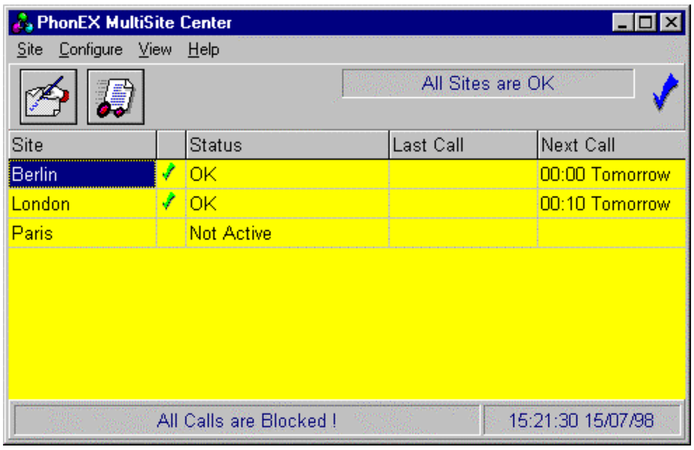
After a No Connection, Disconnect, or No Data, a retry will be scheduled until the Number of Retries has been exceeded. At this point the Site will be assigned the Status, Failed. The next attempt to connect will be according to the Site Connection parameters.

After a No Process, retry will continue to schedule a connection to the Site until data is processed.

Block Calls

This function allows you to easily place all connections on hold until you are ready to begin receiving data. Blocking Calls does not affect Site settings. Select this option from the Configure menu.

While calls are blocked, the list of Sites will be highlighted in yellow. You will not be able to manually collect data.



Selecting this option again will remove the block on calls. Sites that are active will return to being active and Sites that are not active will remain not active.

Currencies

The PhonEX Pro system allows you to work in multiple currencies. This easy-to-use feature is vital in today's global economy. In order for you to be able to work in multiple currencies, your PhonEX Pro system must be configured for multiple currencies when it is installed.

When you first begin working with PhonEX Pro, no currencies are defined. The first currency which you define becomes the main currency. The main currency is identified by a panel on the upper left of the Currency Table.

Note: Once you define the first currency, you cannot delete it or make any other currency the main currency.

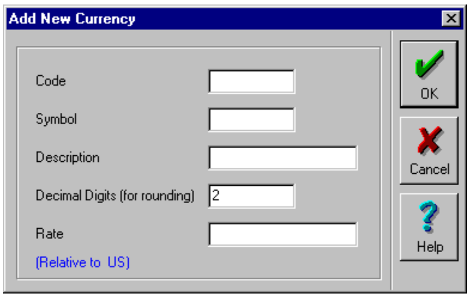
The PhonEX Pro system allows you to redefine currency rates on a monthly basis. Reports and graphs generated for a particular currency automatically use the rate you have defined for that currency, relative to the main currency, for the month covered in the report.

To define currencies, select **Currencies** from the Tools menu. The Currency Table dialog box for the current month is displayed:

Currency Table dialog box

Adding New Currencies

Click **New** to add a new currency. The Add New Currency dialog box is displayed:



Add New Currency dialog box

If you have not yet defined any currencies, the Currency Table will be empty. In that case, when you click **New** to define the first currency, you will be prompted to confirm that this currency will be used as the main currency, according to which all calls are calculated. Click **OK** to confirm.

The following fields are displayed:

Code: Type a code used to identify the currency. For example, type US for United States dollars. The code can include up to 4 characters.

Symbol: Type a symbol used to identify the currency. For example, type **$** for dollars. The symbol can include up to 4 characters.

Description: Type a description of up to 20 characters. The description is usually the plural of the currency name, as in "US Dollars".

Decimal Digits: Type a numeric value for the number of digits to which values are rounded off. For example, to display 13.6499 as 13.65, type **2**.

Rate: Type the value of the new currency, relative to the main currency. For example, if the new currency is worth twice as much per unit as the main currency, type **2**. When you define the main currency, this value is **1** and cannot be edited. The code for the main currency is displayed below this field.

After you enter data, click **OK** to save the new currency, or **Cancel** to close the dialog box without making changes.

Updating Currencies

To update a currency, select the currency to be updated, and then click **Update**. The current information for that currency is displayed in the Update Currency dialog box. Modify the information as required, and then click **OK**, or click **Cancel** to close the dialog box without making changes.

Deleting Currencies

To delete a currency, select the currency to be changed, and then click **Delete**. You will be prompted before the currency is deleted. Click **Yes** to delete the selected currency, or **No** to retain the table as is.

Viewing and Editing Other Months

The green right and left arrows on the dialog box enable you to move from one month to the next. Click the right arrow to advance to the next month. Click the left arrow to return to the previous month. You cannot advance to a future month.

The PhonEX Pro system allows you to redefine currency rates on a monthly basis. If you try to view a month for which exchange rates have not yet been defined, you will be prompted to confirm that you want to define exchange rates for that month. Click **Yes** to confirm. Once you define exchange rates for a month, all reports and graphs for that month automatically use the exchange rates you have defined.

To redefine exchange rates for a month, select each currency in the table and update its rate. If you do not redefine exchange rates, the table will display the exchange rates defined for the following month.

View

Sort

You can organize the list of sites that are displayed in the main screen. The list may be organized so that you can easily view the information that is important to you. To sort the list, select the View menu and then select Sort.

Choose one of the following sorting methods:

Custom

You can specify the exact order of each site by moving the site up or down the list. Select the site to be moved. Select Move Up or Move Down accordingly.

Note This function is only available when the Custom Sorting method is used. When the Custom setting is selected, the Move Up and Move Down functions are available from the quick menu that is displayed when pressing the right mouse button.

By Name

This option will sort the list of sites, alphabetically by the name of the site.

By Status

This option will sort the list of sites according to the status of the site. All failed sites will be listed first, next sites that have an OK status, and finally all sites that are inactive.

Last Call

This option will sort the list of sites according to the time the last call was placed. Calls are listed from most recent to least recent.

Help

On-line help is available from the main menu bar. Additionally, you can receive immediate help from the MultiSite On-Line Help tool by pressiy" the F1 key or the Help button located on most dialog boxes. You will see instructions, explanations, or an index of topics you can choose from. A topic in Help is similar to a page in a book.

If you find a Help topic you will want to refer to again, you can mark it with a bookmark. Choose the Define command from the Bookmark menu in Help, and type a name for the bookmark. Next time you want that topic, choose its bookmark from the Bookmark menu, and the topic will be immediately displayed. A complete description of the help system can be found in the *Microsoft Windows* User Guide.

Within the main on-line Help menu, there are several other features:

- For instructions on using Help, choose How To Use Help from the Help menu.
- For a list of major Help subjects (like the table of contents in a book), choose Content from the Help menu; then choose the subject of your choice. You will see a list of specific topics you can choose from.
- For an alphabetical list of keywords (like the index in a book), choose the Search button any time the PhonEX Help window is displayed. Click or type the keyword you want, and press <Enter> to display a list of Help topics related to the keyword. Then choose the desired topic.
- Copyright information also appears under the Help menu selection.

Index

B

Block Calls..17
By Name 21
By Status 21

C

Communication 10
Configure 13
  Modem 13
Connection 9
Contents 22
Context-Sensitive Help...................22
Currencies 17
  Monthly Exchange Rates...............20
Custom 21

D

Delete 12
  Site...12

E

Exchange Rates, Monthly..................20

G

General 7
Get Data 6

H

Help...22

I

Introduction...1

L

Last Call....................................... 4, 21

M

Main Screen 3
Menu
  Configure 5
  Help 5
  Site.. 5
  View.. 5
Modem................................ 13, 14, 15
  Configure 13
  Predefined.................................... 15
  Test 14
Monthly Exchange Rates 20

N

New
  Site.. 6
New Site
  Communication............................. 10
  Connection..................................... 9
  General 7
Next Call.. 4

P

Parameters 15
Predefined
  Modem... 15

R

Retrieve Data 6

S

Site.. 6
   Delete 12
   New 6
   Update 6
Sort.. 21
   By Name....................................... 21
   By Status...................................... 21
   Custom.. 21
   Last Call 21
Status 4

T

Test
   Modem 14

U

Update
   Site 6

V

View..21
   Sort 21