PTI *Remote Manangement* Software

User's Manual
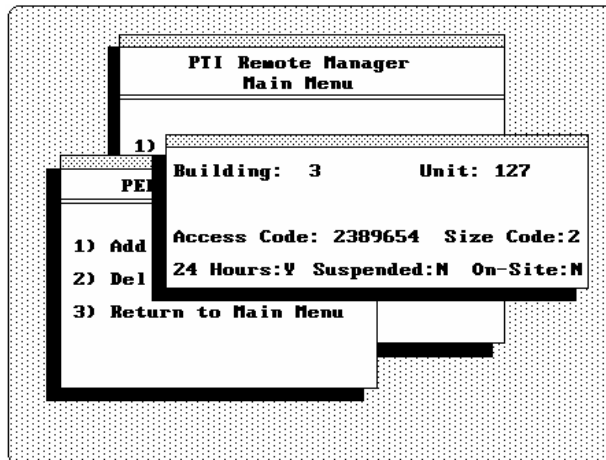

```
          PTI  Remote Manager
                Main Menu

      1)
         PE   Building:  3        Unit: 127

      1) Add
               Access Code: 2389654  Size Code:2
      2) Del
               24 Hours:Y  Suspended:N  On-Site:N
      3) Return to Main Menu
```

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CONTENTS

INTRODUCTION

The **PTI Remote Manager Program** is a software package designed for the IBM Personal Computer (IBM PC) or IBM compatable computers. It allows the complete remote operation of the **PTI Falcon SS** access control system including **PTI Individual Door Alarms** over voice grade dial up telephone lines using 2400 baud telephone modems.

The **Remote Manager** allows the owner of a self storage facility to remotely operate the PTI Falcon system as if he were present at the self storage site, including not only the capability to remotely program the security system, but also the capability to retrieve and report the access records generated by the security system. The **Remote Manager** also allows the owner/manager to save complete copies of both the customer data and access records on the PC disk drive for backup and reporting purposes.

The **Remote Manager** software is a window oriented menu driven system which is easy to learn with a minimum amount of experience. The sections that follow describe the purpose and usage of each of the system menus.

SYSTEM DATA BASE

Description of Data Types

The **REMOTE MANAGER** system must deal with several basic types of data that are stored in several different places. The first type of data is Site Data.

Site Data describes the structure of the self storage site and its operation. Site Data includes the number of rental buildings,the number of rental spaces in each building, the facility business hours, and the present date and time. There is rarely a need to change the site data once it is initially programmmed.

Customer Data is the list of customers (or other users) of the security system. Each customer is described by the building and unit number which he rents, his security access code, and several other parameters. Customer data changes regularly as customers move in and out, are locked out for being past due on rent, etc.

Access Log Data is the third type of data. This data is not entered by the manager, but is created as the security system is operated by the customers. Although the manager does not create the Access Log Data, he still must manipulate it in order to generate a report of the site Access Log.

Location of Data

In addition to the three types of data mentioned above, the manager must contend with multiple copies of each type of data.

Remote Data refers to the copies of the Site, Customer, and Access Log data that exist at the self storage site within the memory of the PTI Falcon system. The Remote Data may have been loaded into the PTI Falcon from the home office computer with the **Remote Manager** software or it may have been entered directly into the PTI Falcon with the keypad on the PTI Falcon.

Local Data refers to the copies of the Site, Customer, and Access Log Data that exist on the disk drive of the PC. This is an exact copy of the data which exists at the remote site. This copy serves as the "master copy" since it is saved in the nonvolitile magnetic memory of the disk drive. It is the manager's responsibility to insure that the Local Data is kept up to date and does in fact match the Remote Data.

Working Data refers to the temporary copy of the Site, Customer, and Access Log Data that exists inside the PC memory as the **Remote Manager** software is run. All changes to the data are made to the Working Data as the program is run. The Working Data is then saved on the disk drive to update the Local Data and then loaded via telephone to the remote PTI Falcon to update the Remote Data. It is important to realize that Working Data is volitile. It in fact will disappear when the computer is turned off or when you cease running the **Remote Manager** program.

A Typical Episode

A typical episode with the **Remote Manager** program will proceed as follows:

Load the Working Data from the master Local Data copy on the disk drive using the "Load Site Data from Disk" command found in the "Save to/Load from Disk" menu.

Edit the Customers as desired using the "Add/Change Unit Data" command found in the "Perform Unit Transactions" menu. This will involve deleting customers that have vacated, adding new customers, locking out past due customers, and re-establishing access for newly paid up customers. In addition, certain customers may be marked for "twenty four hour access" if desired.

Dial the Remote Site using the "Call Remote Site - Touch Tone" or the "Call Remote Site - Pulse Dial" command found under the "Telephone Control" menu.

Load the Remote Site with the updated customer data using the "Write All Remote Customer Data" command found in the "Read/Write Remote Site Data" menu.

Hang Up the telephone line using the "Disconnect Site - Hang Up" command found in the "Telephone Control" menu.

Save the Working Data onto the disk drive using the "Save Site Data" command found in the "Save to/Load from Disk" menu.

Exit the Program using the "Quit" command found in the "Main Menu".

In addition, the manager could have printed several different reports of the Customer Data using the commands in the "Generate Reports" menu. Also the Access Data could have been retrieved from the remote site and saved on the disk or printed.

THE MAIN MENU

Upon first starting the execution of the **Remote Manager** program, the Main Menu appers on the screen. It is from this menu that all other menus may be accessed. There are three ways to access the commands listed in the Main Menu or other subsequent menus:

(1) A command may be selected by pressing the key corresponding to the number of the command as listed in the Main Menu, or,

(2) repeatedly press the up or down arrow keys until the cursor arrow points to the desired command and then press the <Enter> key, or,

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┌────────────────────────────────────┐
│                                    │
│       PTI Remote Manager           │
│          MAIN MENU                 │
│     ═══════════════════            │
│                                    │
│   ➤ 1) Telephone Control           │
│   2) Read/Write Remote Site        │
│   3) Specify Site Data             │
│   4) Perform Unit Transactions     │
│   5) Generate Reports              │
│   6) Save to/Load from Disk        │
│   7) Change Program Settings       │
│   8) Quit                          │
│                                    │
└────────────────────────────────────┘
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(3) press the <Esc> key to automatically select the last command show in the menu. In the Main Menu this will move the cursor arrow to the last command, but will not execute the command to prevent the user from unintentionally quitting the program. In all other menus the last command will be selected and executed.
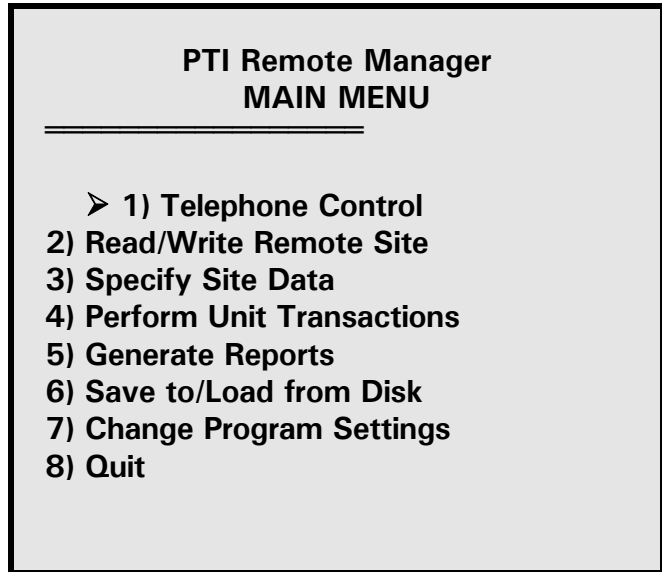
The Status Line

The Status Line resides at the bottom of the screen on all menus. It generally contains a suggestion of what to do next, or an error message if you have entered incorrect data or performed an incorrect action. If there is ever doubt about what to do next, remember that the <Esc> key will cancel most things that you have started and if pressed repeatedly, will retrun you back to the Main Menu.

The Main Menu contains eight commands, most of which lead to other menus containing further commands. A brief description of each command follows:

(1) Telephone Control

This command accesses the Telephone Control menu which contains the commands necessary to establish a connection with the remote site via telephone modem. Commands are included for both touch tone and rotary line dialing and for hanging up the telephone line. If the PTI Remote Manager software is being used with a directly wired permanent connection and not via telephone, this menu should not be used.

(2) Read/Write Remote Site

This command accesses the Read/Write Remote Site menu which contains commands used to write data to the remote site and read data from the remote site. All transmissions to or from the remote site take place using the commands in this menu. Except when there is a directly wired permanent connection to the remote PTI Falcon, a connection must first be established with the remote site using the Telephone Control commands before using any of the Read/Write Remote Site commands.

(3) Specify Site Data

This command accesses the Specify Site Data menu which contains commands for setting the correct date and time for the remote site, defining the business hours during which users of the remote site may enter via the access keypads, and specifying the number of buildings and units in each building.

(4) Perform Unit Transactions

This command accesses the Perform Unit Transactions menu which contains commands for adding, changing, or deleting the access data for each unit. These commands are used any time there is a change in the customer data base due to a new rental, lockout, let-in, or move out.

(5) Generate Reports

This command accesses the Generate Reports menu. Reports on Site Data, Customer Data, and Access Log Data may be generated and directed to either a hard copy printer or to the monitor screen.

(6) Save to/Load from Disk

This command accesses the Save to/Load from Disk menu which contains commands to allow both the Site Data and the Access Log Data to be saved on the disk drive or retreived from the disk drive. Site data is initially specified from the computer keyboard and access log data is retreived from the remote site as desired.
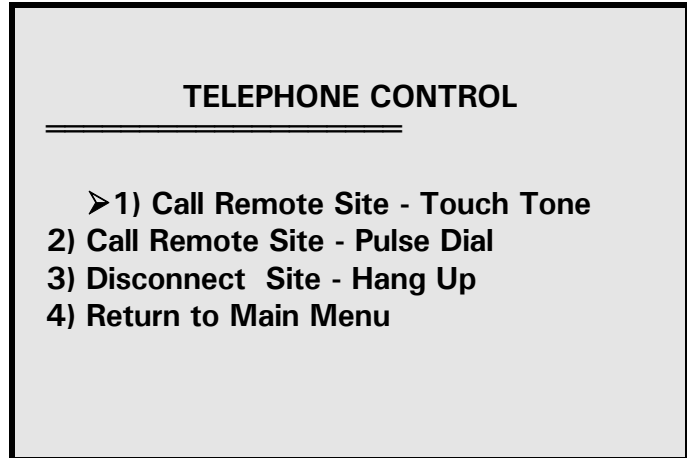
(7) Change Program Settings

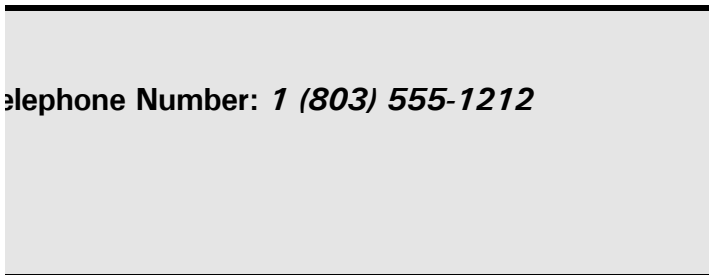This command is for future program options and is presently not used.

(8) Quit

This command is used to quit the program and return control of the computer to the operating system.

TELEPHONE CONTROL

Upon selecting the "Telephone Control" command in the "Main Menu", the "Telephone Control" menu will appear as shown. This menu contains the commands necessary for controlling the telephone modem dialing and line hang up. Before using any of the data transfer commands in the "Read/Write Remote Site" menu, a connection must first be established with the remote site by calling it with the commands in this menu. When all data transfer has been completed, the telephone line should be hung up using the "Telephone Control" menu. Each command may be described as follows:

TELEPHONE CONTROL
━━━━━━━━━━━━━━━━━━━━

➢**1) Call Remote Site - Touch Tone**
2) Call Remote Site - Pulse Dial
3) Disconnect Site - Hang Up
4) Return to Main Menu

(1) Call Remote Site - Touch Tone

elephone Number: *1 (803) 555-1212*

In order to dial the remote site, enter the telephone number for the remote site. Punctuation characters such as parenthases, hyphens, and spaces are allowed for clarity but not required. Enter the number just as you would for a normal telephone call, including a "1" and the area code if required. Upon pressing <Enter>, the message "Dialing, Please Wait" will appear on the status line at the bottom of the screen. When dialing is complete and the remote site has answered, the status line will indicate that a connection has been established. If a connection cannot be established, the status line will indicate the error. Press <Esc> to exit the dialing command.

(2) Call Remote Site - Pulse Dial

This command functions identically to the Touch Tone command described above, except that the modem is instructed to use rotary dial pulses rather than Touch

Tones. Use this command only if you have rotary dial telephone service instead of Touch Tone service.

(3) Disconnect Site - Hang Up

OTE - **This procedure hangs up the telephone line and disconnects the remote site**

This command is used to hang up the telephone line to the remote site when all transmissions have been completed. When the explanation box illustrated appears, hit <Enter> to hang up, or <Esc> to cancel. After hanging up, hit <Esc> to return to the "Telephone Control" menu. **Failure to execute a hang up command will leave the line open at considerable expense if the call is not a local call! Most modems have a status indicator light labeled "OH" for "Off Hook". Verify that the line has been hung up by checking this light or through other means!**

READ/WRITE REMOTE SITE

All transmissions to and from the remote site are performed with the commands in this menu. Commands exist to allow the exchange of "Site Data", "Customer Data", and "Access Log Data" with the remote site. In addition, a command exists to trigger the relay in any access keypad at the remote site. This can be used to open an entrance by telephone.

Although "Site Data" and "Customer Data" may be both read from and written to the remote site, "Access Log Data" may only be read from the remote site since it is generated only by the remote site. In addition, the access log at the remote site may be cleared so that it starts collecting fresh data as customers enter and exit the site.

All commands in this menu require that the computer transmit data to the remote site and then retreive an answer from the remote site. The status line at the bottom of the screen will indicate when transmission is taking place and if there is an error in transmission. Some commands cause lengthy amounts of data to be exchanged and the transmissions may take several minutes on a large site.

READ/WRITE REMOTE SITE DATA

➢ 1) Read Remote Date/Time/Hours
2) Write Remote Date/Time/Hours
3) Read All Remote Customer Data
4) Write All Remote Customer Data
5) Read Remote Transaction Log
6) Clear Remote Transaction Log
7) Trigger Remote Relay
8) Return to Main Menu

(1) Read Remote Date/Time/Hours

OTE -**This procedure causes the Date, Time, and Business Hours at the remote site to be sent back to the computer.**

This procedure can be used to read the settings for the Date, Time, and Business hours from the remote PTI Falcon back to the computer. Any settings that you have previously entered from the keyboard will be over written with those retreived from the remote site. It is seldom necessary to read this data back from the remote site in normal operation, however, if you

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have accidentally deleted the master copy of the site data on the disk drive and yet beleive that the data in the remote PTI Falcon is valid, you may use this command to read back the data from the PTI Falcon in order to save it on the disk drive again.

(2) Write Remote Date/Time/Hours

OTE -**This procedure causes the Date, Time, and Business Hours entered to be sent to the remote site.**

After entering the Date, Time, and Business Hours from the keyboard or retreiving them from the disk drive if they were previously saved, this command may be used to transmit them to the remote site. It is very important to verify that the data is correct before transmitting since the clock in the remote PTI Falcon will be set to the date and time sent.

(3) Read All Remote Customer Data

OTE -**This procedure clears the customer data in the computer and then reads all the customer data from the remote site into the computer.**

This command may be used to read the entire customer data base from the remote PTI Falcon back to the computer. In normal operation this is seldom necessary since the customer data should be saved on the disk drive, but it is possible to restore an accidentally erased customer data disk file if the data in the remote site is valid. Note that any data you have keyed in but not saved on the disk drive will be over written with the data read back from the remote site.

(4) Write All Remote Customer Data

OTE -**This procedure loads the remote site with all customer data in the computer.**

This command is used to transmit all customer data from the computer memory to the remote PTI Falcon. The data in the remote site is over written by the new data sent with this command. This command will be used frequently to update the remote site whenever

there has been a change in customer status. Typically after reading the customer data from the disk drive to memory, the customer data will be modified as required and then transmitted to the remote site with this command, and then the updated data will be saved on the disk drive.

(5) Read Remote Transaction Log

OTE -This procedure reads the remote Transaction Log into the computer for further processing.

This command is used to retreive the access log from the remote site to the computer memory. It then may be printed or saved on the disk drive for future use. The PTI Falcon will accumulate transactions until its memory buffer is full. It then will begin throwing away the oldest transaction as it adds each new transaction to the buffer. **To prevent loss of access log data, the transaction buffer must be read before it fills and then cleared so that it accumulates new data.** The size of the PTI Falcon transaction log varies with amount of memory purchased for the Falcon, but even the smallest model holds approximately two hundred forty transactions before overflowing.

(6) Clear Remote Transaction Log

'ARNING -This procedure causes the remote site to discard its transaction log and start a new log!

This command is normally used after reading the Transaction Log from the remote PTI Falcon in order to clear the transaction log so that it may accumulate new data. If the transaction log is not occassionally cleared, the PTI Falcon will begin throwing away the oldest tranactions as new ones occur.

(7) Trigger Remote Relay

elay Number? *3*

This command may be used to trigger the relay in any access keypad located at the remote site. This will typically cuase the gate or entrance associated with the keypad to open. This can be used to allow some one without an access code to enter the site. Care should be taken to

insure that any entrance or gate that you trigger will automatically close or relock after a short period so that it does not remain open indefinitely.

SPECIFY SITE DATA

Site data is composed of the Date, Time, and Business hours for the remote facility as well as the number of units in each building of the remote facility. Site data rarely changes once it is programmed, with the exception of the Date and Time. It is generally sufficient to define the site data once and then save it on the disk and transmit it to the remote PTI Falcon. The commands in the "Specify Site Data" menu allow you to define or change the site data as necessary.

SPECIFY SITE DATA
_____

➢**1) Set Remote Date/Time**
2) Set Business Hours
3) Set Building Sizes
4) Return to Main Menu

(1) Set Remote Date/Time

ate: *11/20/90*   Time: *9:00 AM*

This command is used to specify the correct date and time to be transmitted to the remote site. The PTI Falcon will maintain the correct date and time on its own once it has been set, so this command is used infrequently.

(2) Set Business Hours

'eekday   Open: *12:00 AM*
aturday   Open: *12:00 AM*
unday   Open: *12:00 AM* Holiday   Open: *12:00 AM*
'eekday   Close: *11:59 PM*
aturday   Close: *11:59 PM*
unday   Close: *11:59 PM*
oliday   Close: *11:59 PM*

This command is used to set the Business Hours to be sent to the remote site. Customers are allowed to enter only during the specified business hours unless

they have been given twenty four hour access. If it is intented that all customers have twenty four hour access, set the business hours as shown above.

(3) Set Building Sizes

Building: *1*   Number of Units: *179*

The number of units in each building may be specified with this command. Before customer data can be entered for any unit, the building containing the unit must be defined with this command. Unit numbers higher than the specified building size will be considered illegal. It is permissable to specify a building size larger than the actual size to allow extra access codes to be defined for the building. Nonexistent buildings may also be defined to allow for extra access codes for the site, such as the managers code, etc.

PERFORM UNIT TRANSACTIONS

The "Unit Transactions" menu contains commands to allow the control of individual tenants. This menu is one of the most frequently used menus once the initial site programming has been done. Any time that there is a move in, lock-out, let-in, or move out this menu must be accessed to update the customer data. All functions except move-outs are performed with the "Add/Change Unit Data" command. Move-outs are controlled with the "Delete Unit Data Command".

```
         UNIT TRANSACTIONS
         ━━━━━━━━━━━━━━━━

   ➢1) Add/Change Unit Data
  2) Delete Unit Data
  3) Return to Main Menu
```

(1) Add/Change Unit Data

```
 uilding: 1    Unit: 165


 ccess Code: 34798230 Size Code: 0
 4 Hours: N       Suspended: N   On-Site: Y
```

Upon selecting this command, you will be prompted for the Building and Unit number that you wish to edit. After entering the building and unit numbers, the present settings for the unit will appear. You may change the settings by typing new values followed by the <Enter> key. After all data is entered for a unit, the last <Enter> key will save the data and you will be asked for another building and unit number to edit. When all are properly entered, hit the <Esc> key. Access codes can be eight digits long or less; leading zeros are ignored by the PTI Falcon. The unit size code is presently ignored by the PTI Falcon. If "24 Hours" contains "Y", the unit will be granted twenty four hour access regardless of the settings for business hours. If "Suspended" contains "Y" the unit will be locked out. "On Site" should be set to "N" under most circumstances, but a "Y" will appear here if you have read customer data back from the remote Falcon when the customer is on the site. The left arrow and right arrow keys will allow you to go forward or back up if you make a mistake while entering data.

(2) Delete Unit Data

ıilding: *1*   Unit: *165*

This command is used to delete the customer data for a unit. Upon selecting this command, you will be prompted to enter the building and unit number that you want to delete. After the building and unit number are entered, the data for the unit will be displayed in the menu. If you wish to delete the unit, hit <Enter>. If you do not wish to delete the unit, hit <Esc>. If you select a nonexistent unit to delete, the screen status line will indicate the error.

GENERATE REPORTS

The **PTI Remote Manager** is capable of generating a variety of reports. All reports may be directed to either the screen or printer. If a report is directed to the screen, the printing will pause after each screen fills and you will be prompted to hit a key to continue. The reports fall into three basic catagories:

(1) Site Data Report

This command produces a report of the Remote Date, Time, Business Hours, and the Building Sizes. If no buildings have been defined, it will be so indicated.

GENERATE REPORTS
_____

➤**(1) Site Data Report**
(2) Complete Unit Report
(3) Suspended Unit Report
(4) On Site Unit Report
(5) 24 Hour Unit Report
(6) Unrented Unit Report
(7) Access Log Report
        (8) Return to Main Menu

(2) Unit Data Reports

The "Complete Unit Report" command will list all units for each building by printing a single line for each unit which contains all the unit data. The "Suspended Unit Report" command will include only locked out units. Similarly, the "On Site Unit Report" command will print only on-site units and the "24 Hour Unit Report" command will print only units with twenty four hour access. The "Unrented Unit Report" command will print the unit number for all units in each building for which no customer data has been entered.

(3) Access Log Report

The "Access Log Report" command will print the access log for the remote site provided that you have first called the remote site and retrieved the access log data, or retreived from the disk drive access log data which was previously saved on the disk drive. If you have not retreived the access log, the report will note "No Transactions Found".

When a report type is selected, the "Report Disposition" menu box will appear. Enter an "S" to send the report to the screen or a "P" to send

Report Disposition: *S*
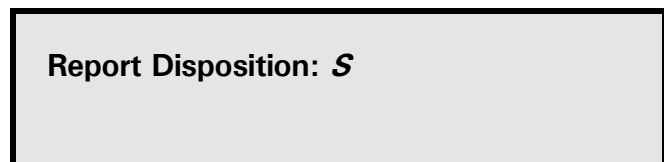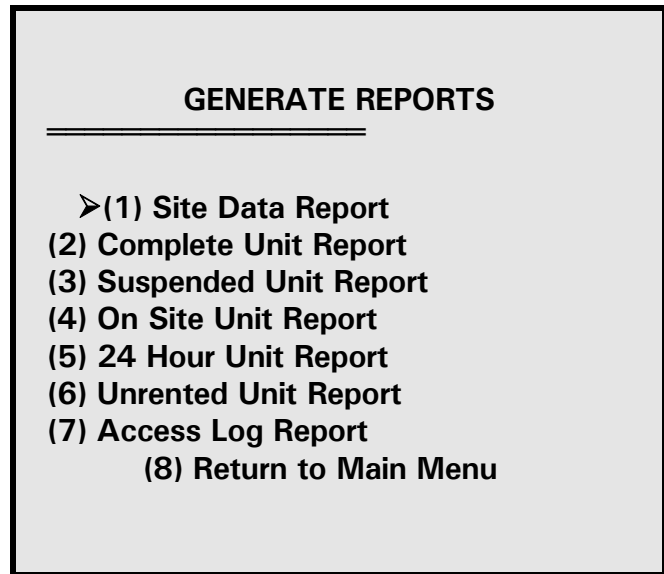
the report to the printer.

SAVE TO/LOAD FROM DISK

The commands in the "Save to/Load from Disk" menu are used to save and retreive two different data types. The "Site Data" commands will save or retreive all site data and all customer data in under one file name. The only data not included in the "Site Data" commands is the transaction log data for which separate commands exist. **The importance of regularly backing up data to the disk drive cannot be over emphasized!** The copy of the data on the disk drive is considered to be the master copy and will be referenced frequently.

SAVE TO/LOAD FROM DISK
_____

➢**1) Save Site Data on Disk**
2) Load Site Data from Disk
3) Save Event Log on Disk
4) Load Event Log from Disk
5) Return to Main Menu

File Name: *MYSITE.DAT*

Upon selecting a disk drive command, you will be prompted for a file name with the file name menu. A file name must obey the standard MS DOS naming conventions, which allow it to include a drive specifier, a directory path, a name, and an extension or type. A name such as "A:\BACKUP\MYFILE.DAT" will cause the file to be referenced on disk drive "A", subdirectory "BACKUP" and filename "MYFILE.DAT". **Be aware that even hard disk drives eventually fail, so back up often and make copies on multiple diskettes!**

(1) Save Site Data on Disk

This command writes all site and customer data from the computer memory to the disk drive under the selected file name.

(2) Load Site Data from Disk

This command reads all site and customer data from the selected file name on the disk drive into the computer memory for inspection, modification, or transmission to the remote site.

(3) Save Event Log on Disk

This command writes all transaction log data from the computer memory to the disk drive under the selected file name. The transaction log must first be read from the remote site before any transaction log data will exist to save.

(4) Load Event Log from Disk

If access log data has previously been saved using the previous command, it can be retreived from the disk drive to memory for printing with this command.

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