GenRMS Professional

Software Manual

For GenRMS Professional V2.5.x

Table of Contents

Updated 9/2/2021

Introduction: What is GenRMS Professional?

GenRMS Professional (GenRMS Pro) is a powerful application which allows remote management and control of ATMs from a PC.

GenRMS functions through two programs, the primary being a 'Server' application which sends and receives all communication from the ATMs and stores collected information to a database.

The GenRMS Client application is the front end where you can view the ATMs and related data as well as request 'jobs' to be run where specific data is pulled from or sent to the ATMs.

You have one instance of GenRMS Server, which requires a product license and can support an unlimited number of ATMs – and you can have any number of RMS Client applications installed allowing any number of ATMs to be reached by a virtually unlimited number of people, and with a public (static) IP address or VPN, from virtually anywhere.

The features of GenRMS Professional include:

- Real –time access to ATM settings, statuses, and reports which can be updated at any time
- Remote management of your ATMs and the ability to perform many ATM functions, including downloading Journals and Transaction Reports, quickly and easily.
- Receive SMS (text) and Email Alerts to report change in service status or low cash, with both general and specific contacts for each ATM
- Access to ATM Setup settings including Messages, Receipt Headers, Bill Count and most ATM programming.
- Scheduled functions and check-ins for 'in-bound' only' ATMs.
- Manipulation of BIN Lists and Custom Advertisements directly from within the GenRMS program.
- The ability to organize and group machines by type, location or custom lists.
- Remote Rebooting and updating of ATM software.

GenRMS Professional and System Requirements

GenRMS Professional is comprised of two programs, and a database, which are all necessary for a functioning system.

• GenRMS Service Manager (Server)
•GenRMS Client

The GenRMS Service Manager is the program which handles communication between the ATMs and the database. This application requires a Windows PC (physical or virtual) and requires a license key to operate.

The GenRMS Client is the program which acts as a console to allow users access to the data and view the ATMs being monitored.

You can also have any number of 'Client' computers running the GenRMS Client program. This allows multiple users in your office to share access to the same ATM data.   Clients connect to the RMS Server PC via the Server's IP address. If you wish to access your RMS Server outside of your company or private network, then you will need to set up a "public" IP address for your Server PC.

System Requirements

- GenRMS Pro requires a Windows PC (physical or virtual).
- Supported Operating Systems are Windows 7 and Windows 10
- Note that Windows 2008 Server (R2) is supported however it requires SQL2008 which we do not include (see Microsoft support site for SQL2008-Express)
- GenRMS does not use a lot of CPU or RAM – so if your PC supports Windows 7 or 10 it should be sufficient to support GenRMS.

Your PC should have an Internet connection, and a dial-up / telephone modem if you intend on connecting to ATMs currently on dial-up.

It is recommended that the RMS Server PC is left powered on at all times to receive any incoming alerts from the machines you are monitoring.   Change your Power Management settings to prevent the PC from sleeping.

Anti-Virus Software

GenRMS will automatically create rules within Windows Defender to open the necessary ports for the program to function – however Anti-Virus applications including Norton and Mcafee will detect GenRMS as a threat and require you to manually exclude the application. Check with your Anti-Virus software manufacturer for how best to do that.

Planning Your RMS Installation

The following topics are important to consider before installing RMS and for planning how you will be setting up your GenRMS Pro Server and ATM network.

Database

GenRMS Pro requires a database to store all the information collected from the ATMs.

Included with GenRMS is a copy of Microsoft SQL Express 2012 – this 'free' version of the database program SQL allows a maximum database size of 10GB. Generally this is sufficient for most users, however if you have a large amount of ATMs and you're saving all the journal records along with the generated log files, it's possible to exceed that database size restriction. If that occurs, there are two options.

1) Purchase a Microsoft SQL License – this will remove the database size restriction and you can collect as much data as your hard drive allows. If you already have a corporate SQL license, you can point RMS to create its database there and not use the SQL Express version included.

2) Use the Database purge tools in GenRMS Pro to periodically delete Log files, Job results and older Journal records which are no longer needed. This process can be done manually or set up as a scheduled event.

Database management tools are found in the GenRMS Server toolbar – with the cylinder icons.
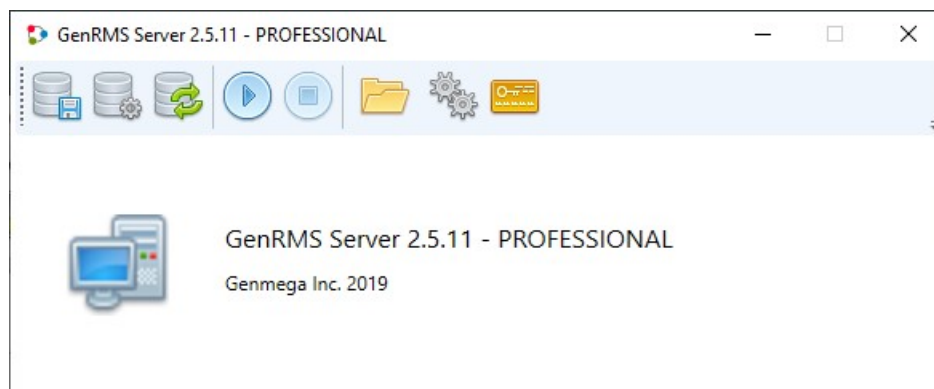
Firewall

If your company or private network (LAN) is protected by a Firewall, you will need to work with your IT staff or Internet provider to open certain ports in your Firewall to allow the ATMs and GenRMS server to communicate.

GenRMS Server connecting to the ATM requires port 18456
ATM connecting to GenRMS requires port 18458 (TCP) or 18450 (SSL)
Internal communication between GenRMS Server and any Client PCs requires ports 18471 and 18472.

Communication

It's important to understand how RMS communicates with your ATMs – specifically, what are the limitations and the best way to program your terminals in case you ever need to move your internet provider or your RMS computer.

Your ATMs are generally connected to the internet – either by internet provided by the location, or by a wireless / cellular box. Some machines may still be connected via dial-up modem (phone line).

There are some terms to understand when explaining how your ATMS can be connected to RMS.

IP Address – This is the 'address' of a device or computer on a network or on the internet. Think of this like the number on your house, or your cell phone number – it's how you send data to a specific device across the internet or a network.

Static IP Address - this is a 'Public' IP address that is assigned by your internet provider, that will not change, and can be access from anywhere. Your RMS computer MUST have a static IP address in order for your ATMs to be able to reach the computer from all their individual locations.

Private IP Address – when you have broadband internet at your business or home or ATM locations – there is an internet router or modem that provides internet to all the devices on your network. To identify them all individually, the router assigns 'Private' IP addresses to all the devices that connect to it. These typically start with 192.168.xxx.xxx or 10.xx.xx.xx

Wireless ATM (cellular) – For customers using wireless or cellular boxes with their ATMs, the boxes need to be setup by their manufacturers to allow RMS to communicate with the ATM through the box. Sometimes this requires the box manufacturer to install a VPN on your RMS computer. Please talk with your wireless box manufacturer to learn how GenRMS can be supported and set up.

Bidirectional Communication – This means that your RMS computer can connect to the ATM at any time or the ATM can connect with RMS PC at any time. If you need to request a Journal entry from an ATM or upload new software, you can do that real-time. For this to work, both the ATM and the RMS PC would need 'Static IP addresses'. Typically this is not possible because you'd need every ATM location to set this up with their internet provider. However wireless boxes and dial-up ATMs can support this.

One way Communication - This is how most RMS installations will work. Because your ATM is using a locations broadband internet and only the RMS computer has a 'Static IP address' then your ATMs can communicate with RMS, however the RMS computer cannot initiate a call to the ATM.   RMS is designed to work with this by having the ATM periodically check in with RMS and if you want to perform any task, like change an ATM setting or upload some custom graphics to the ATM – that 'Job' will be created in RMS and when the ATM checks in that job will be performed. The ATM has to open the communication channel – then RMS can communicate with it.

RMS Network

In addition to installing RMS on your computer and learning how the program works and all the various things you can use it for – it's critical to also plan how you will set up your network so that everything can communicate.

Static IP or URL – per the previous page, you must have a Static IP for your RMS computer. This address will be programmed into all your ATMs (RMS Host IP address) so that the ATM knows where to call for RMS communications.   In the event you might change Internet providers or move your location, it's advisable that you have a website or domain name (URL) hosted by a company like Godaddy – for example – if you register a domain called www.myrmsaddress.com - you can have that website point to your Static IP address.   This means that you can program your ATMs with that URL address instead of the Static IP address – this is good because if you ever change internet providers or you move and have to change that Static IP address – you will never have to reprogram your ATMs for the new address – you just edit the website and point it to your new Static IP.

Port Forwarding – within the Internet Router that your RMS Server computer will be connected to, you'll need to enable 'Port Forwarding' which means that you're asking the router to direct specific traffic (RMS data) to that specific computer. Ports 18456 (outbound) and 18458 (inbound) will need to be pointed to the private IP address (or MAC address) of your RMS computer.   Your internet provider should be able to help you with this process.

Installing GenRMS Professional:

Installation of GenRMS Professional requires several components. It will be important to follow these instructions carefully to ensure a successful installation.

This manual assumes you have downloaded the software from Genmega. If you have not, you should do so from this URL: http://ftp.genmega.com/software/RMS/NewRmsPro.zip

If that link does not work – cut and paste the link into your browser to download.

That file, once extracted contains the following:

- GenRmsPro Server install application
- GenRMSPro Client install application
- SQL Express
- Manuals

First the database portion of GenRMS Pro must be installed.

NOTE: If you will be using an existing SQL installation or connecting to a corporate database server, you should skip this section and proceed to **Installing GenRMS Professional**.

We recommend you read through the Installation process first, before you begin to check for anything that might require changes due to your computer environment.

Begin by installing Microsoft SQL Express

Installing SQL Express 2012

Installing Microsoft SQL provides the database used by GenRMS. As stated under system requirements, this is a solution for computers running Windows 7, or Windows 10.
The installation process outlined under this section for SQL Server 2012 Express applies to a typical installation on a computer running Windows 10, and may vary slightly for computers running Windows 7

You should be running this program from a user account that has Administrator privileges – or directly from the Administrator account.

From the GenRMS Pro file you downloaded, open the SQL Express folder and click the file "SQLEXPR_x86_ENU" to run it.   It may take some time to run while it extracts it's files.

If a windows appears with the message "This program has compatibility issues", select to "Run the program without getting help". The program will then extract files.

If Windows asks "Do you want to allow the following program to make changes to this computer?" then click 'Yes' to proceed.

When the installation program starts – choose 'New SQL Server stand-alone installation'

Before proceeding the installer will check for any available updates from Microsoft.

If it finds some (Service Packs) it will download, otherwise once the search is done – click 'Next' to proceed.

The installation will begin – from the box below, select 'Perform a new installation' per below and click 'Next'.
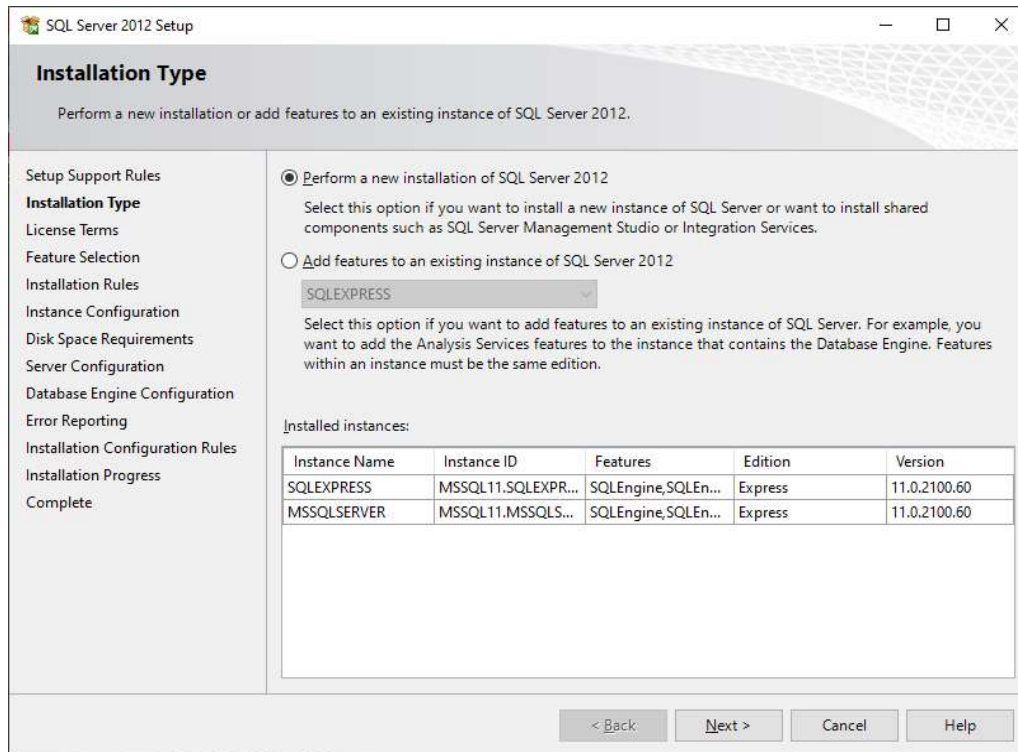
At the next screen you have to accept the Microsoft license terms.

Click the option to 'Accept' and then click 'Next' to continue.

The Installation Wizard runs a System Configuration Check. Once complete, select "Next".

Next you'll have a Feature Selection Screen.
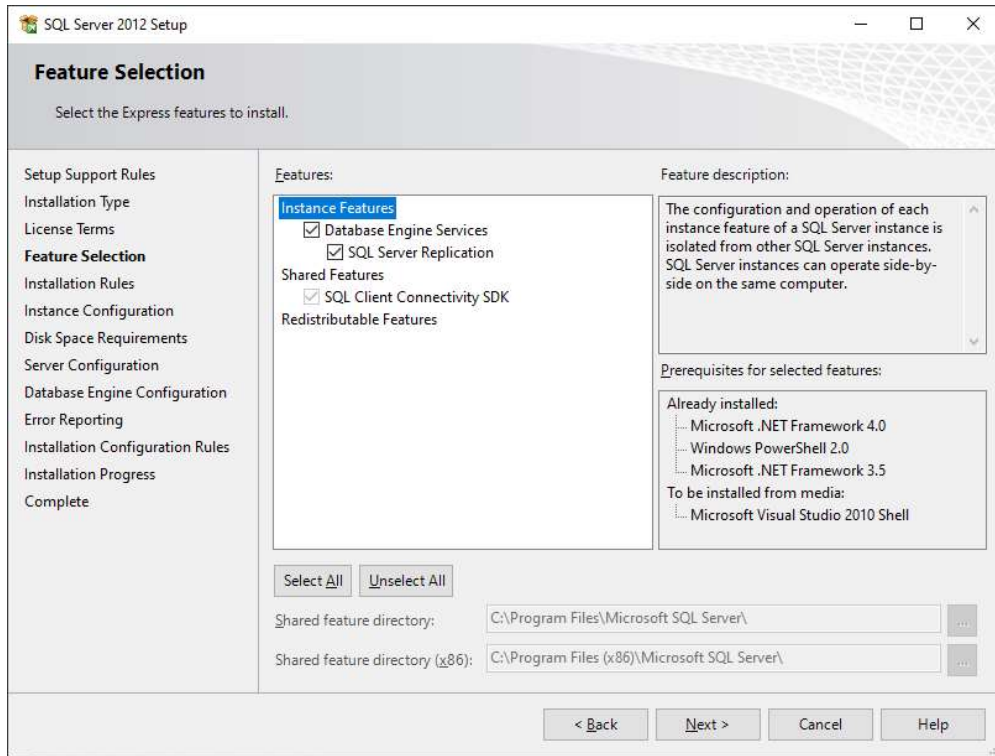
Make sure the boxes are all selected per above – this should be the default.

Select 'Next' to proceed.

At the Instance Configuration screen – change the default setting from 'Named Instance' to 'Default Instance' as shown below – this step is very important to the installation.

Make sure this screen below matches before proceeding:

(●) Default Instance

Instance ID: MSSQLSERVER
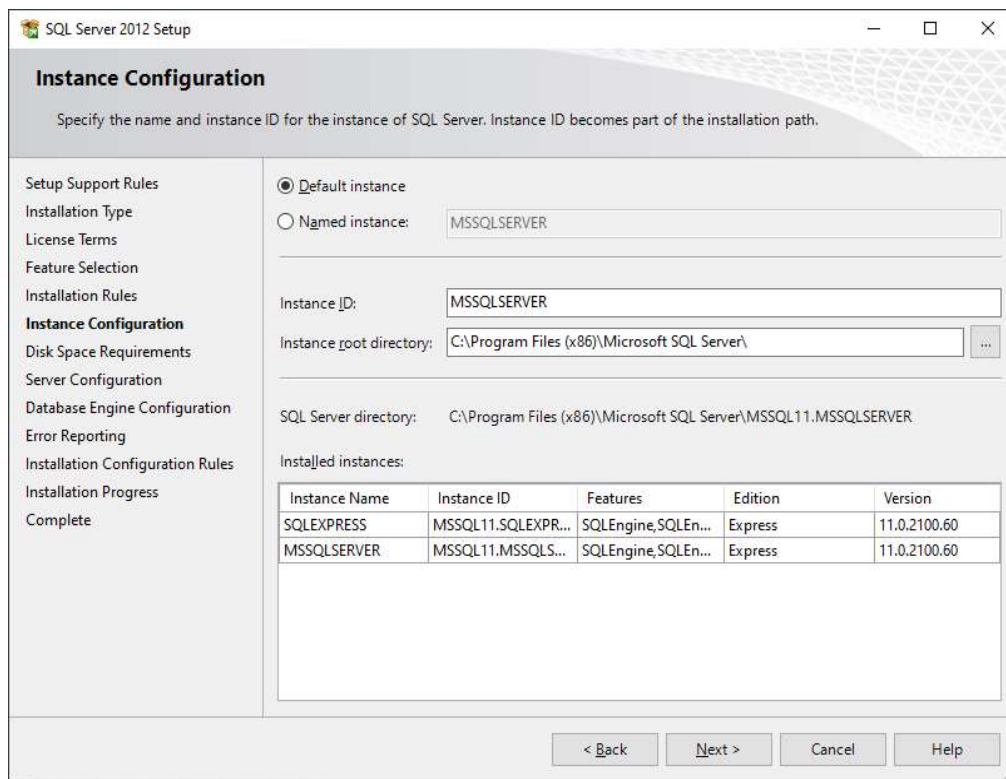
Next is a box asking about Authentication Mode.

Make sure to select 'Windows Authentication Mode' (default) per below.
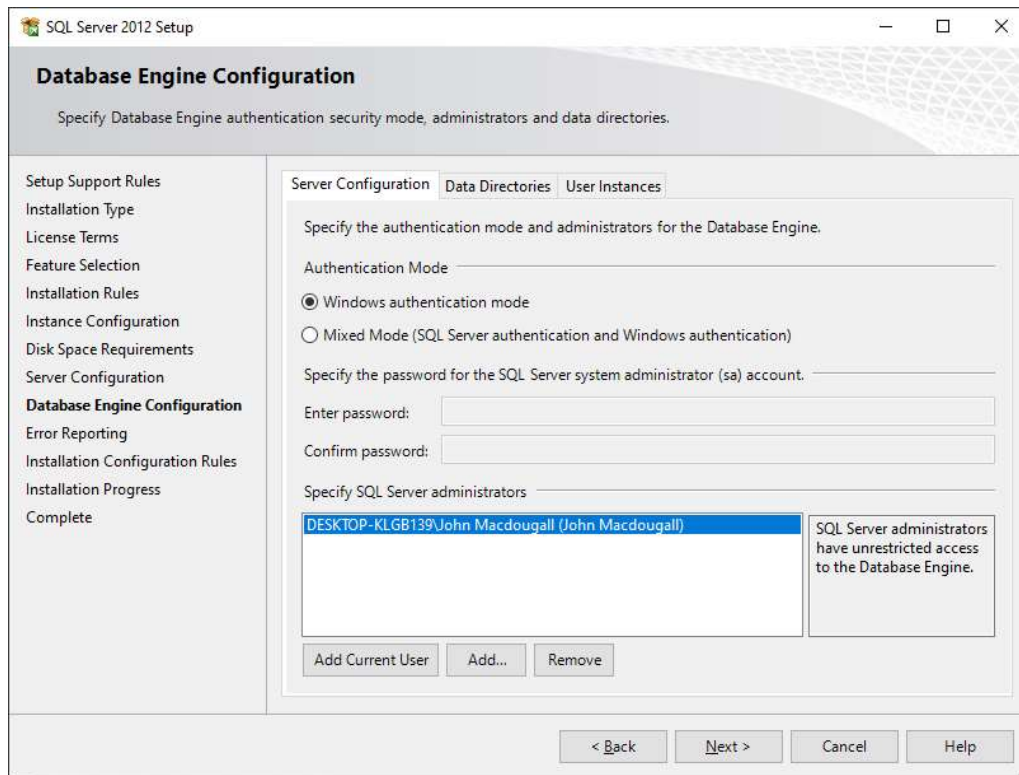
There will be a box following this one to allow 'Error Reporting' – just click 'Next' to skip.

At this point the installation should begin and the database will be setup.

Once it's complete, you should see a Summary screen showing that the install was successful.

You should reboot the PC once this is done so that the SQL services are started.

Installing GenRMS Server

GenRMS Pro requires a license key to be installed to activate the Server program.

There are two options for this – a physical USB license labeled GenRMS Professional, which needs to be installed into your PC (into any available USB port).

Alternatively, for a Virtual Server – you can get an alpha-numeric key to be entered via the Server application.
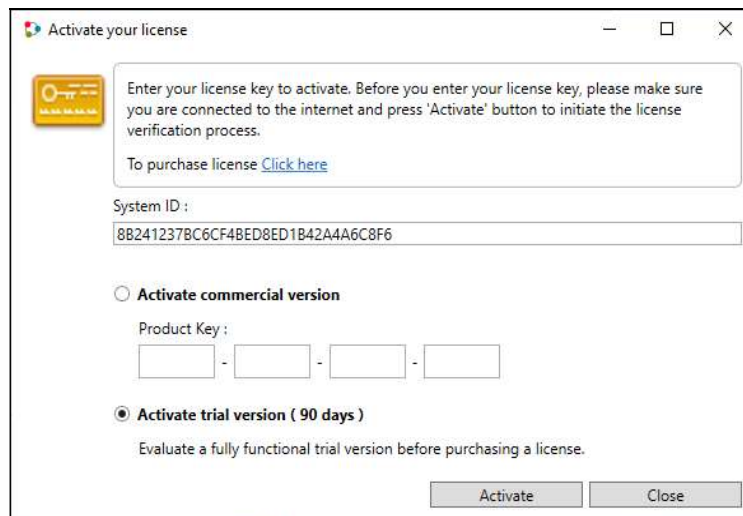
If you're using the USB license key (shown below)

Plug it into an open USB port on your computer that will be running the GenRMS Pro Server.

Note: unlike a memory drive, this USB license key will not show up under the "Computer" section in Microsoft Windows. There are no files on this device – it just contains an encrypted license that the GenRMS program can validate.

If you're using the alpha-numeric license key to activate your GenRMS installation, you'll need to do that at the screen below, once the program has been installed.

GenRMS Professional

The next step is to install the GenRMS Server application.

Click on the GenRmsServer-2.5.xx application included in the files you downloaded from Genmega.

You should receive a message from Windows – requesting permission to run the application – click 'Yes'.
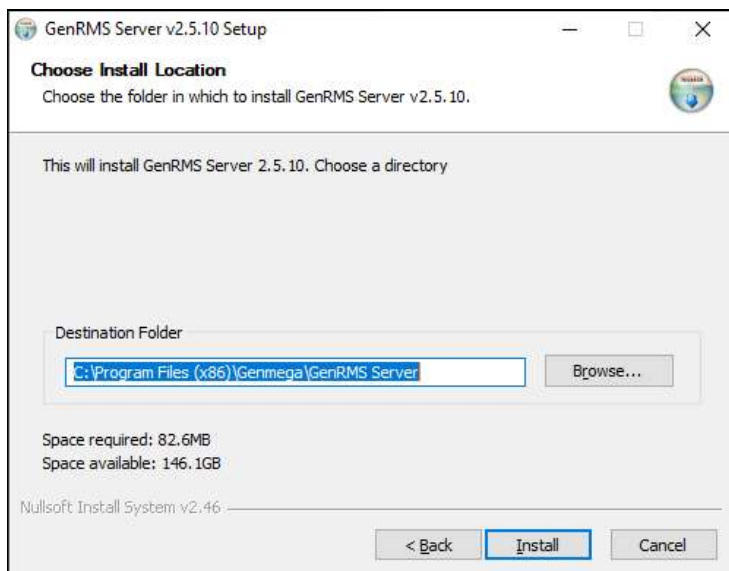
From there you should see the GenRMS Server setup Wizard. The version number listed below was current at the time this manual was created (V2.5.10)
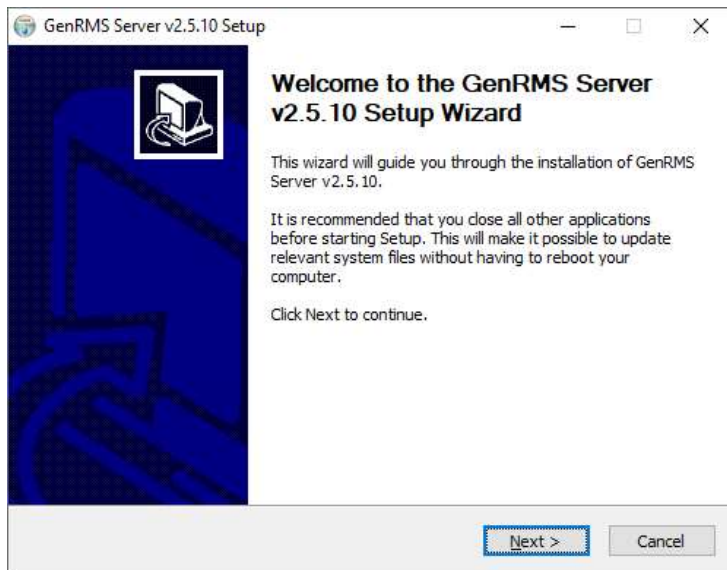

Click "Next" to proceed.

You'll then get a standard 'License Agreement' which must be acknowledged to continue.

Followed by the installation location - just click 'Install' to continue.

GenRMS Professional

The program will then being installing – as it reaches the end, there will be a pause while it installs the drivers needed for the License Key – this may take a few moments.
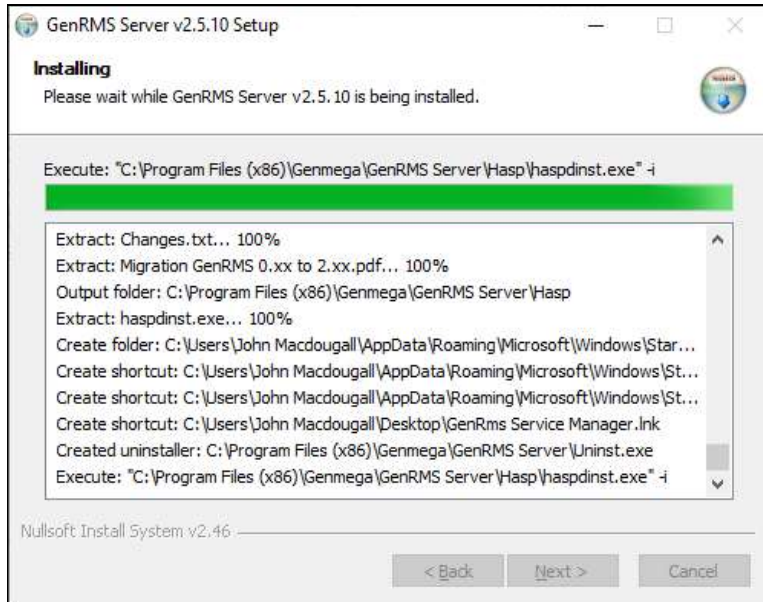
Once this part is complete – you'll receive a notice for 'Operation Successful' click 'OK' to continue.
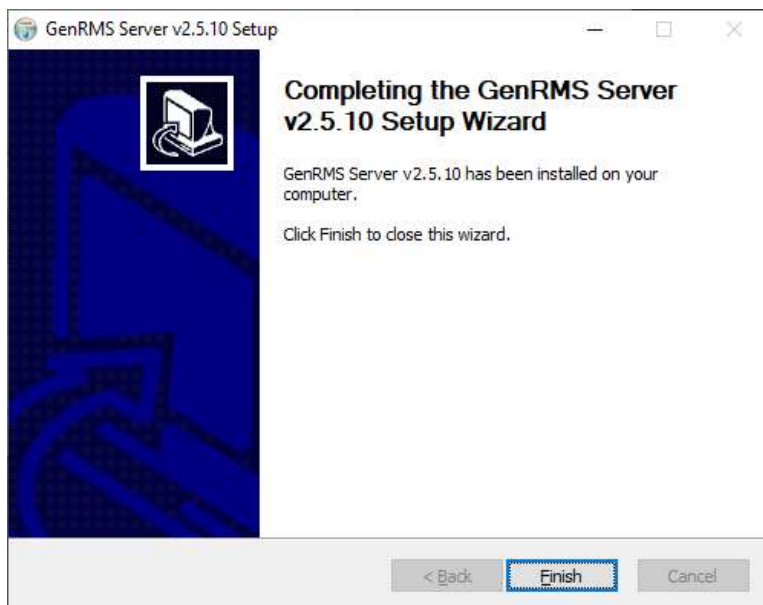
At this point click 'Finish' and the GenRMS Pro Server installation is complete.

Next, install the Client application – this is the same procedure as the Server.

Click on the GenRmsClient-2.5.xx application included in the files you downloaded from Genmega.

- you'll get a warning from Windows regarding permission to let the program install.

This process is the same as the Server application. Click Next and allow the program to install.

If you need to install the 'Client' application on additional PCs – that is the only step you need to follow.
You do not have to install Server or the database application.

Once these two applications have been installed – there will be two new icons on your desktop.

The installation portion is now complete.

First Run of GenRMS Server Manager

Click on the GenRMS Service Manager icon to open the program. It should be located on your desktop.

When the GenRms Service Manager runs for the first time, it will automatically open the Database Setting window:
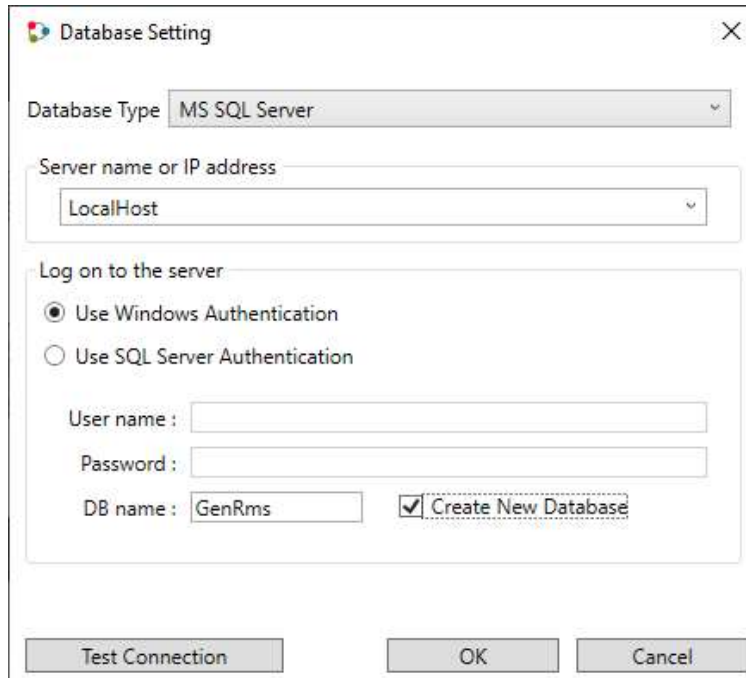

Make sure Database Type says 'MS SQL Server' per above, and click 'Use Windows Authentication'

On the Server Name or IP Address, click the 'down arrow' which will have the program search for the database.   This will generally show the name of your PC along with MSSQLSERVER – if so select that option from the drop down menu.

If you're going to be using a Network based / corporate SQL Server, you can type in the IP address or server name.   Click the 'Create New Database' box and the click OK.

If after clicking 'OK' you get a Database error message, type typing 'LocalHost' into the Server name (see below) or the local IP address of the GenRMS PC into the Server name box.   Click OK to proceed.

You can also click 'Test Connection' to verify before clicking OK.

During this initial process – you should also see a box notifying you that some port changes need to be added to Windows Defender – Click yes to that notice.

Once the new database has been successfully created and registered within GenRMS Pro, you'll see the message below.

To proceed with running RMS for the first time, click the 'Play' button on GenRMS Server console.

See below (in the red box)

This will start the RMS Service – it will also 'grey out' the other icons on the console. You can only access those menus and functions when the service is stopped.

You can only run the GenRMS Client window when the service is running. If you stop the GenRMS service with the Client window open – you'll get an 'Unable to connect to broker' error and the Client window will shut down.
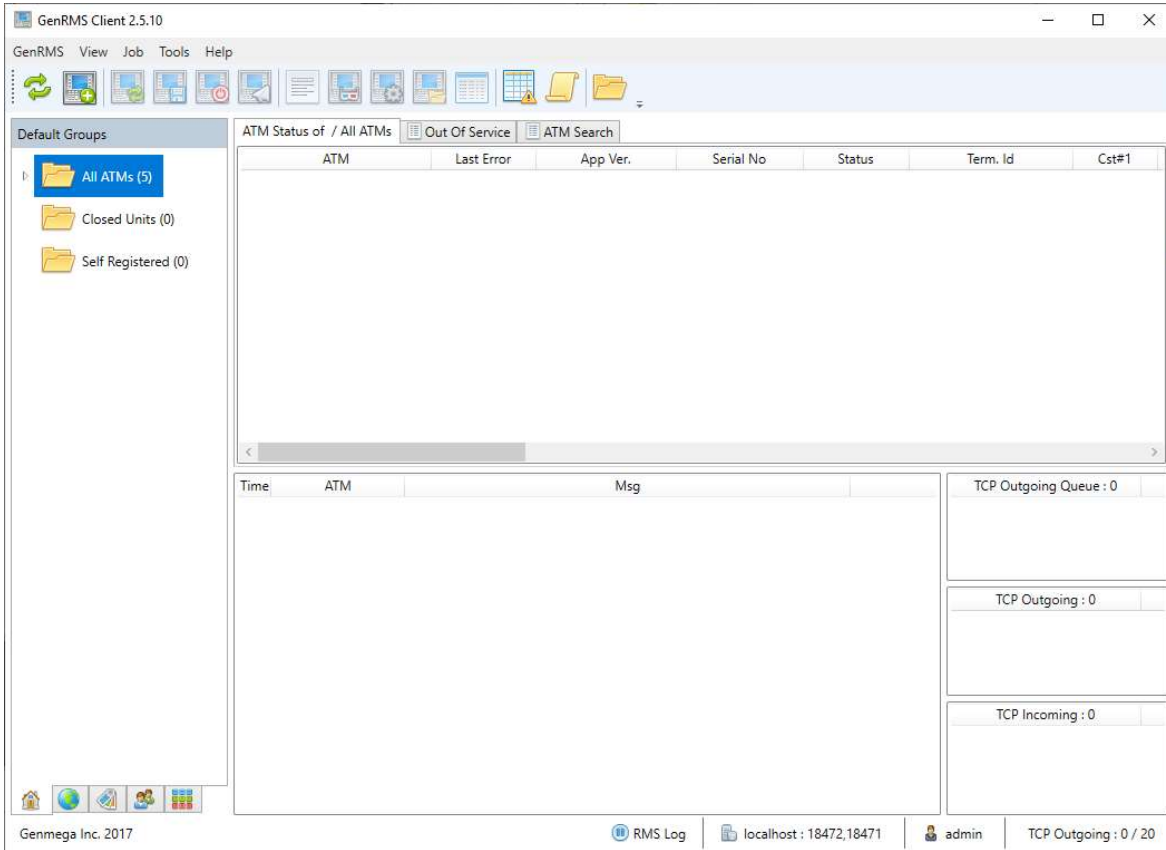
With the service running, now click the 'GenRMS Client' icon to open RMS.

Below is the login screen for the client – the default password is 'admin' (lowercase) – you can change that password, however all users will use the same password to open the Client window.
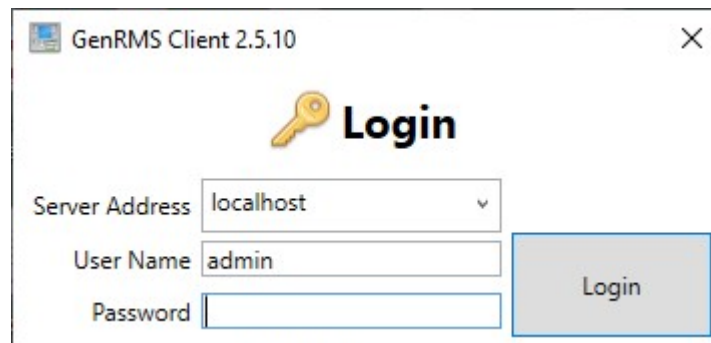
Once you successfully log in, you'll open the Client window below.

At this point you're ready to start using GenRMS.

Adding an ATM into GenRMS Pro

Adding ATMs into GenRMS is done by the following two methods:

Auto-Registration – this means the ATM is programmed to automatically call into RMS at pre-set intervals. This typically means you have one-way communications (ATM can call you – you cannot call ATM)

Manually – this means you have bidirectional communications with the ATM (usually from a wireless or cellular box) and you have the address to contact the ATM directly.
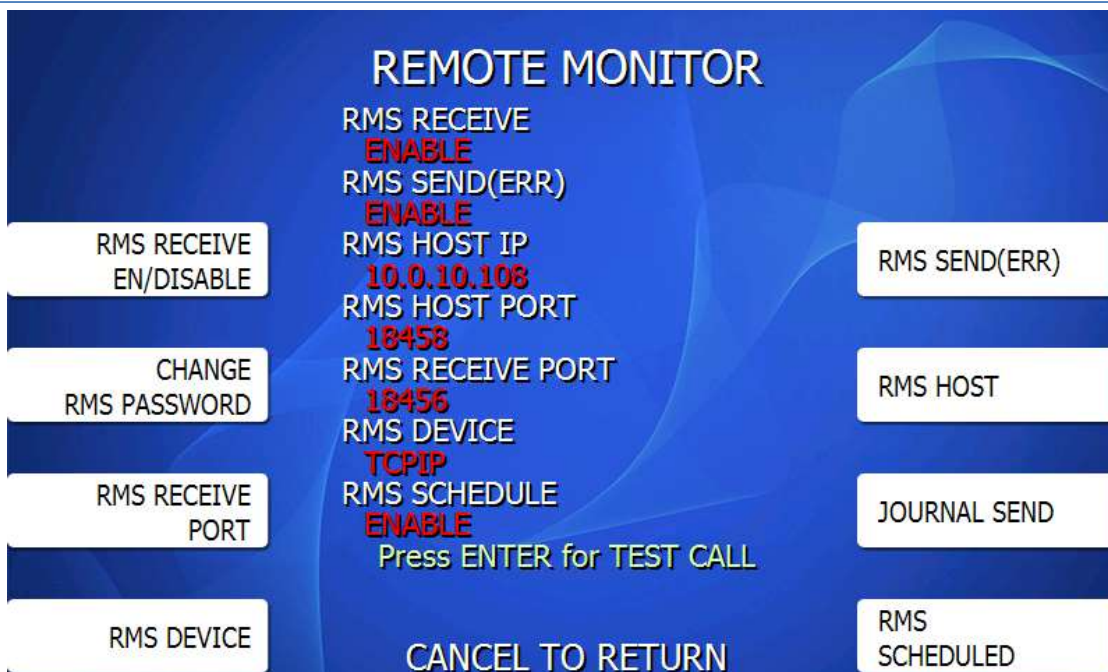
Auto Registration

If your ATM machine is programmed to connect to RMS at preset intervals, and your GenRMS Server is setup and ready to receive incoming connections - then the machines will check in by connecting and appearing in the 'Self Registered' folder under Default Groups.
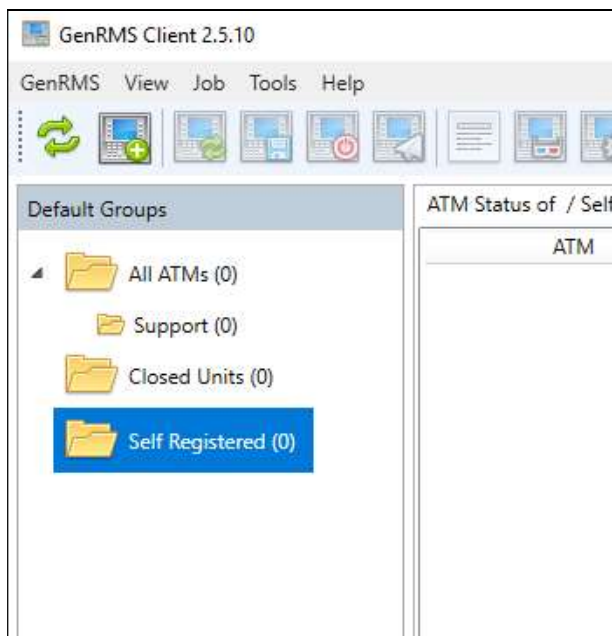
To set up Auto Registration from the ATM – you'll need to program the following at the ATM using the Master Password to access the Host Setup menu.

Enter the ATM OP (operator) menu using the Master Password and then proceed to Host Setup.

From Host Setup, choose Remote Monitor to access the settings for GenRMS.

To Auto Register your ATM to your GenRMS Server – you will need to set the following options (at a minimum)

RMS Send = This option must be set to 'Enable' – this allows RMS to call out to the RMS PC.

RMS Host IP = This is the Public IP Address or website (URL) of your RMS PC.

Once those two options are set – you can press 'ENTER' on the ATM keypad to initiate a call from the ATM to the RMS PC. If successful, it will then add this ATM to the 'Self Registered' folder in your GenRMS Client window.

If this test call returns as 'Test Failed' – then you have to check the following:

- Was the RMS Host IP address entered correctly ?

- Does the ATM location have a Firewall on their internet router ? If so then a rule needs to be created for the ATM to communicate on port 18458. Check with the locations internet provider or IT staff.

- Is the GenRMS Server PC up and running and not being blocked by Anti-Virus software or a Firewall.

Manual Registration of an ATM

If you have bidirectional communications with an ATM, meaning you have a public address (or VPN) to connect directly – then you can add the ATM using the menus in GenRMS.

Click the Register ATM icon on the left side of the GenRMS Client Toolbar found on the top of the GenRMS Client window. You'll then see the following configuration window.

The minimum to register an ATM at this screen will be:

ATM Name = this can be anything (the name of the location is commonly used)
ATM Serial Number = this is the serial number programmed into the ATM.
RMS Password = default is '333333', however this must match the value programmed at the ATM.
IP Address = this is the Public IP address of the ATM or ATM wireless / cellular box

See the section later in this manual '**Edit ATM**' for more details on the options in this menu.

Once that data is entered you can use 'Test Connection' to verify that RMS can communicate with the ATM. If it's successful, then click 'Register' to add the ATM to the Client window.

If the ATM you're adding is using a telephone line, then you'll need to change the Comm. Device to 'Modem' and enter a telephone number rather than an IP address.

There are many other options and settings in the Edit ATM screen, which will be detailed later in this manual under 'Edit ATM'.

Once Registered, the ATM should appear in the ATM List of the Client window per below. Until you first are able to communicate with the machine, the status will remain at 'Unknown' (yellow exclamation)
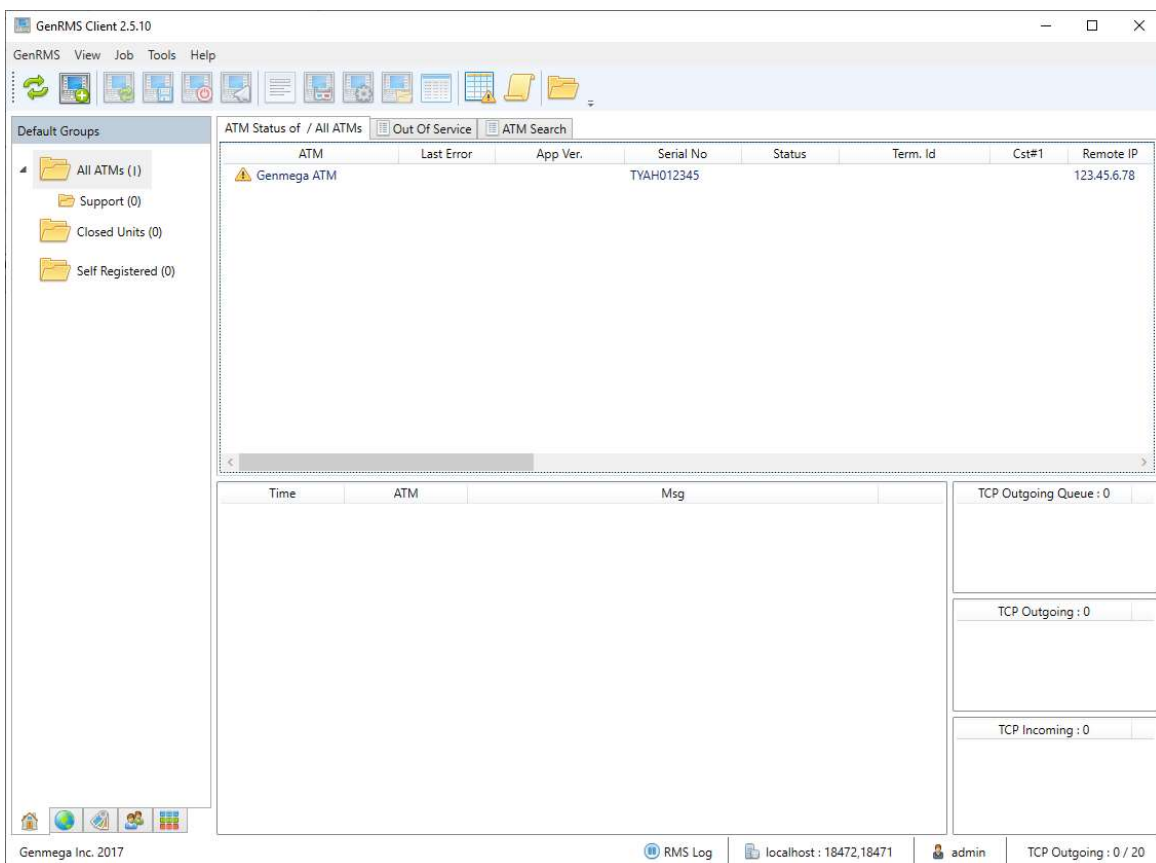
These are the two methods of adding ATMs into your RMS program.

ATM Menu RMS Setup – RMS Options

Once an ATM is set up to connect to your GenRMS PC – there are several other options in the ATM Menu that will effect what data is sent to the ATM, how often the data is reported and enhanced security options. You can find more details in the Genmega V05 Software manual , or from the descriptions below:

RMS Receive (Enable / Disable) = this option enables incoming RMS Requests (from PC to ATM).

RMS Send-ERR (Enable / Disable) = this option enables outgoing RMS connections – ERR refers to the original purpose of RMS which was to send error message notifications to the RMS PC.   If the ATM goes out of service, RMS will report that change in status to the RMS PC – even if no other RMS options are enabled. For this option to be enabled – you'll be required to also program a RMS Host address.

Change RMS Password = the default RMS password is '333333' you can change this to any 6 digit password. The incoming RMS request will verify the password matches what is stored in the ATM

RMS Host = (sub-menu) from this menu, you program communication settings for the ATM to connect to the GenRMS Server PC.

RMS SSL = (Enable / Disable) this option allows you to encrypt RMS data between the ATM and your RMS PC with the same SSL / TLS encryption used for ATM transactions. If you enable this option – it must simultaneously be enabled within RMS (Edit ATM) or else the communication will fail. If using Self-Registering, disable this option for the initial communication and then Enable on both sides after the initial call in.

RMS Send Host IP = This is the IP address or website (URL) that points the ATM to your GenRMS PC. If your ATM is connected via dial-up (telephone) modem then you'll use this field to enter a phone number.

RMS SSL Port = We recommend leaving this setting at default 18450

RMS Receive Port / RMS Host Port = We recommend leaving these settings at default 18456 / 18458

RMS SSL Verify Cert. = (Enabled / Disabled) this option will check the SSL/TLS encryption certificate against one being used in the GenRMS Server PC.

Load Cert. from USB = This function will read / load a custom encryption certificate as a .PEM file from a USB drive. Insert the drive containing the certificate file into the motherboard and press this button.

RMS Journal Send = (Enable / Disable – Number of Journals) when this is enabled, each time the ATM connects via RMS to report status, it will also upload the last 'X' number of journals, which you specify from the menu.

RMS Device = (TCPIP / Modem) use this to select which device will be used for RMS communications. Note that you are able to use a different method than the ATM transactions. So you could have ATM transactions via TCPIP and RMS communication though dial-up modem – or vice versa.

RMS Schedule (sub-menu) = from this menu, you can program the ATM to contact your GenRMS server at preset intervals.

Scheduled Check (Enabled / Disabled) set to Enable to have the ATM connect to RMS at intervals.

RMS Check Interval (# in minutes) this is how often the ATM will connect to RMS and report stats / look for any pending jobs to run.

Unload Once / 24 Hours (Enabled / Disabled) – With this option, once the ATM has successfully connected and reported status – then it will not do so again for 24 hours (unless an Out of Service error occurs) – this was primarily used for Dial-up / telephone ATMs so they wouldn't overwhelm the modem with incoming calls.

Scheduled Start Time (0h-24h o'clock) – this is the time at which RMS will start making the outbound connections. Default is 3 o'clock, which is when the ATM automatically reboots each night. This option was primarily used for Dial-up / telephone ATMs.

Record Journal(ERR) (Enabled / Disabled) – when set to Enabled this option will record any errors connecting to the GenRMS PC to the ATMs electronic journal. They will show as E000x errors.

Per above – there are quite a few options which can be used to customize how your ATM interacts with RMS. The ATM does not send sensitive data (like card or PIN numbers) to the GenRMS PC, however for customers that wish to protect / encrypt their data the options exist, however they're not required.

Common Configuration

For most users – connecting their ATMs using broadband internet at a location – you'll set RMS Send to Enable – then enter the RMS Host IP address of your GenRMS Server – and enable RMS Schedule (for 240 minutes) with this basic setup, your ATM will check into GenRMS every 4 hours and also report any out of service error conditions.

Using GenRMS Pro

The following will detail the GenRMS Pro User Interface and the various options and functions.

GenRMS Client Window

Below is a sample of the GenRMS Client window where you view and manage your ATMs
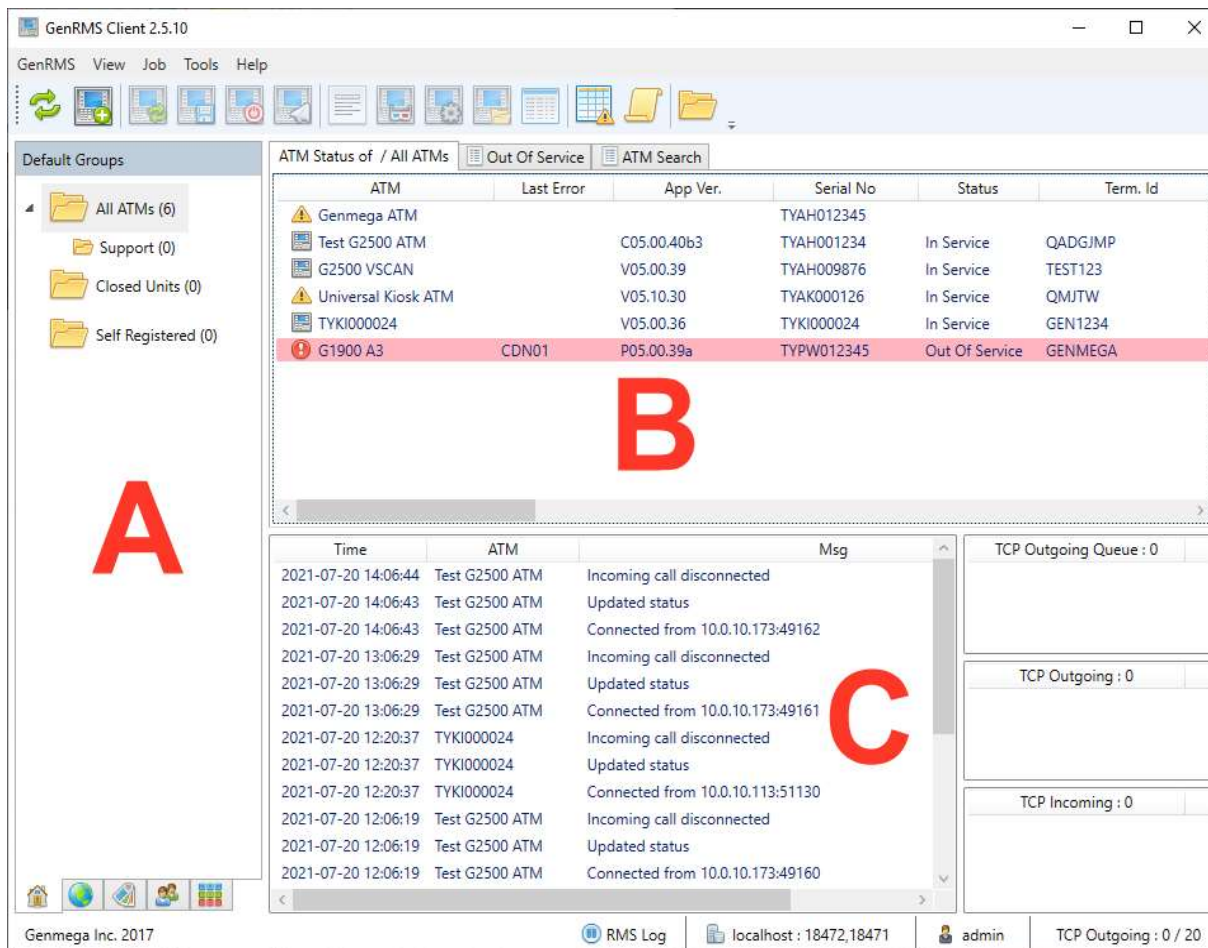
ToolBar – At the top of the Client window is the toolbar with shortcut icons to common used functions.

Panel 'A' – this is where you can manage how your ATMs are grouped or to sort based on criteria

Panel 'B' – shows the status and details for ATMs in the selected group

Panel 'C' – all incoming and outgoing communication logs for each machine at it connects or disconnects

Interacting With Your ATMs

When using GenRMS Pro – there are two ways of interacting with the ATMs you have registered, or self-registered using the Client window.

Using the Tool Menus Toolbar Icons found at the top of the Client Window, also around the Group panel along the left side and the tabs at the top of the ATM Status panel.
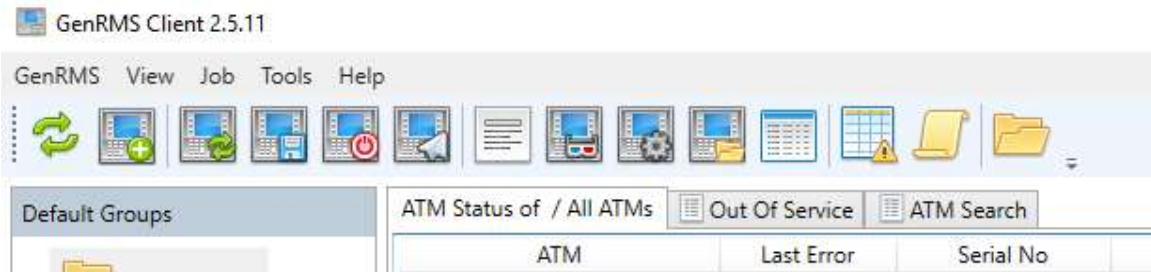
'Right-Clicking' on any individual ATM or Group of ATMs, you will pull up a menu of all the functions and jobs which can be run.
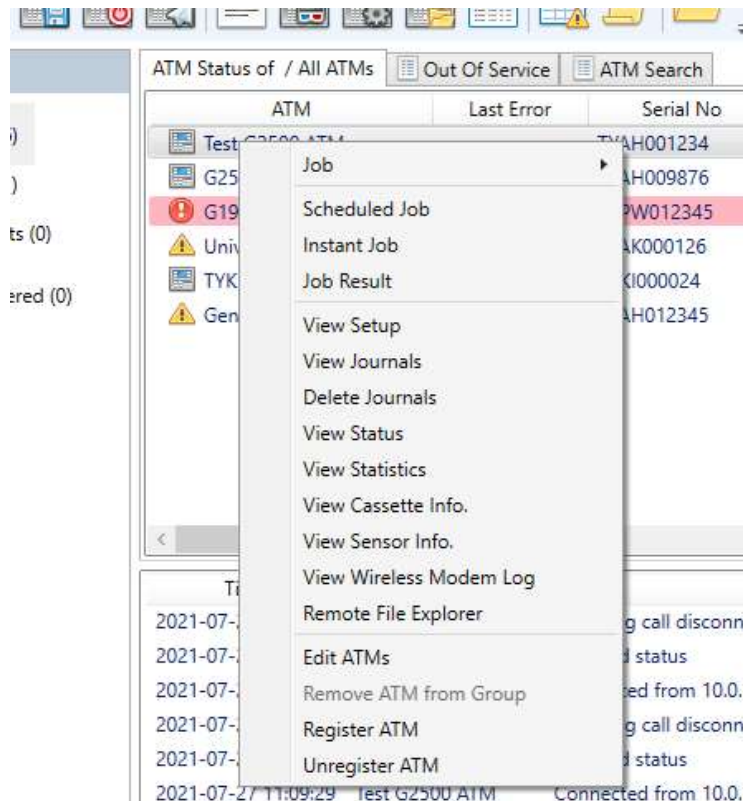
The options and details from each of these methods of interacting will be explained in the following sections.

GenRMS Pro Toolbars

The following will detail the options and functions found in the GenRMS Pro toolbar in the upper right corner of the Client Window.
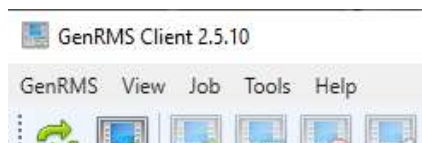
GenRMS Menu

Change Password - Here you can change the password used for logging into GenRMS. The default password is 'admin'. Note if you change the password and forget what it is, the only way to recover is to load a special file which can be used to default the password. Contact Genmega Technical Support.

Export ATM List - This function will export all the data from Panel 'B' on the previous page to a .CSV file (spreadsheet).

View Menu

ToolBar / Status Bar – Selecting or unselecting these allows you to hide the 'Toolbar', which is the row of icons across the top of the Client window – or the 'Status' bar – which is the line at the very bottom of the Client window. These options are simply to give more space for the other panels.

Columns – This allows you to select which information columns appear in the 'Panel B' section of the Client window. There are 26 different data criteria which can be displayed – or you can disable some if they're not necessary for your usage. By disabling a column, you're not deleting the data, and you can enable it again at any point.

Note: In the Client window, you can also drag the Column names left or right to re-order them. Click on the column name and hold your mouse button down – then move the column name to the left or right.

In the example above – click and hold in the 'Serial No' box and drag it over 'App Ver.' to rearrange those two columns. When dragging the column – keep your mouse in line (horizontally) with the other column names as you drag it left or right – or else you may have to start over.

Job Menu

Jobs refer to tasks you want RMS to request or send to the ATM. For example, if you want to pull some Journals from an ATM, or change the Welcome Message, or send a software update – those tasks are called Jobs within GenRMS. Depending on the specific Job, you can often combine several to be run at once when a connection is made to the ATM.

Add Job – if you select Add Job from the Job menu, you'll see the Run Job screen below.

Target ATM – Using the (+) green or the (-) red icons, you can select individual ATMs or Groups of ATM for which you would like to run the selected Job.

Command – This is a list of jobs that you can request from the ATM, or send to the ATM. Use the dropdown menu to chose a Job, and then use the (+) green or (-) red icons to select or remove that job. If the job you've selected has secondary parameters, then they will show in the column next to the command. A list of all Job descriptions is provided later in this manual under 'Right-Click Menu'.

If the jobs you're selecting are all requesting data from an ATM, you can combine more than one – for example you can 'Get Status', 'Get Cassette Info' and 'Get Journals' all at the same time. However if you choose a job that requires the ATM to reboot as part of the process – like sending Files or Graphics, then that job will have to be run separately.

In the Job window below - as an example, we've added 3 ATMs to pull data from – and then in the Command window, we've selected 3 Jobs.
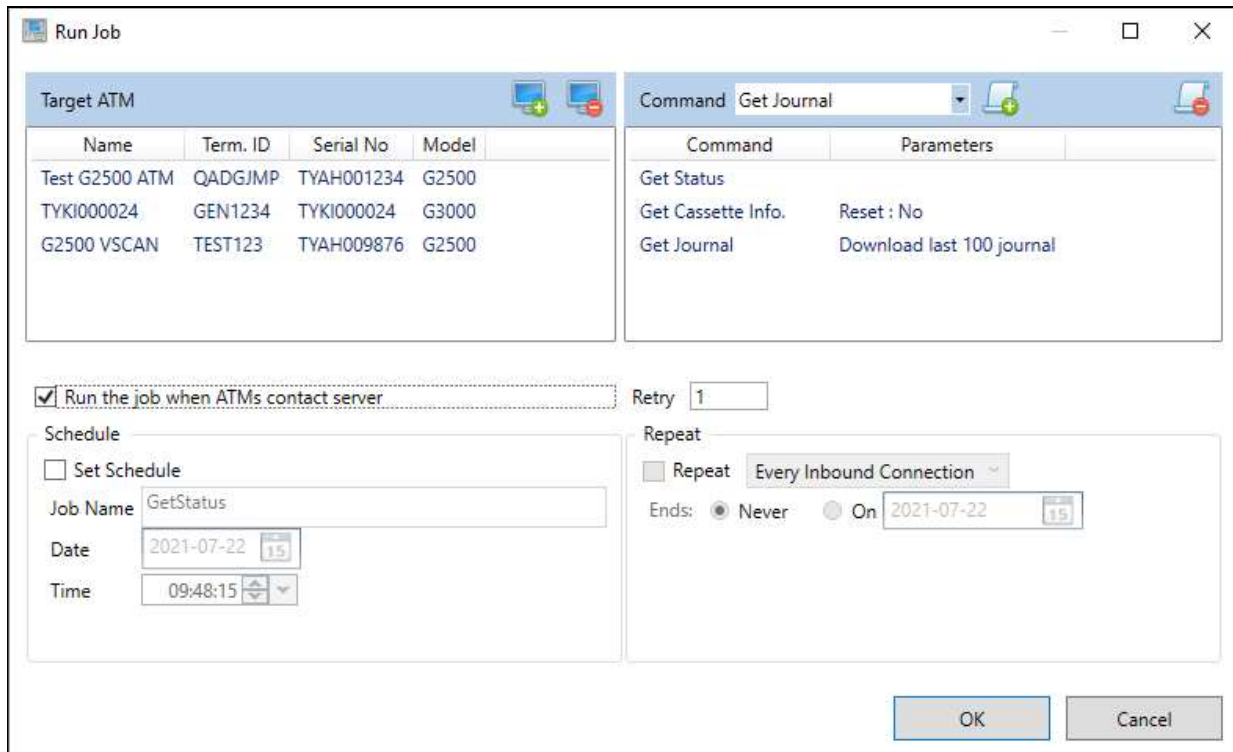
Run the job when ATMs contact server – this setting is very important based on how your ATMs are connecting to GenRMS.

If you have <u>bidirectional communication</u>, like with a wireless or cellular box then you can create the job and run it whenever you're ready. You can schedule jobs to be run at certain times using the 'Set Schedule' options and you can also 'Repeat' the job every time the ATM connects – or daily.

However if your ATMs are using <u>one way communication</u> – where the ATMs are programmed to check in at preset intervals – then you must select this box for 'Run the job when the ATMs contacts server' – this is telling RMS to wait for the ATMs listed to check in, and once the communication is open, perform the selected commands.

When you click [OK] from the Run Job screen – If you have not checked the 'Run the job when ATMs contact server' box – then GenRMS will start attempting to connect and performing the jobs.

If you have checked the box for 'Run the job when the ATMs contact server' – then clicking [OK] will close this screen and RMS will wait for the inbound connection to start.

Scheduled Job Manager

If you schedule jobs in advance using the 'Set Schedule' option in the Jobs menu, then you can manage them from this menu:
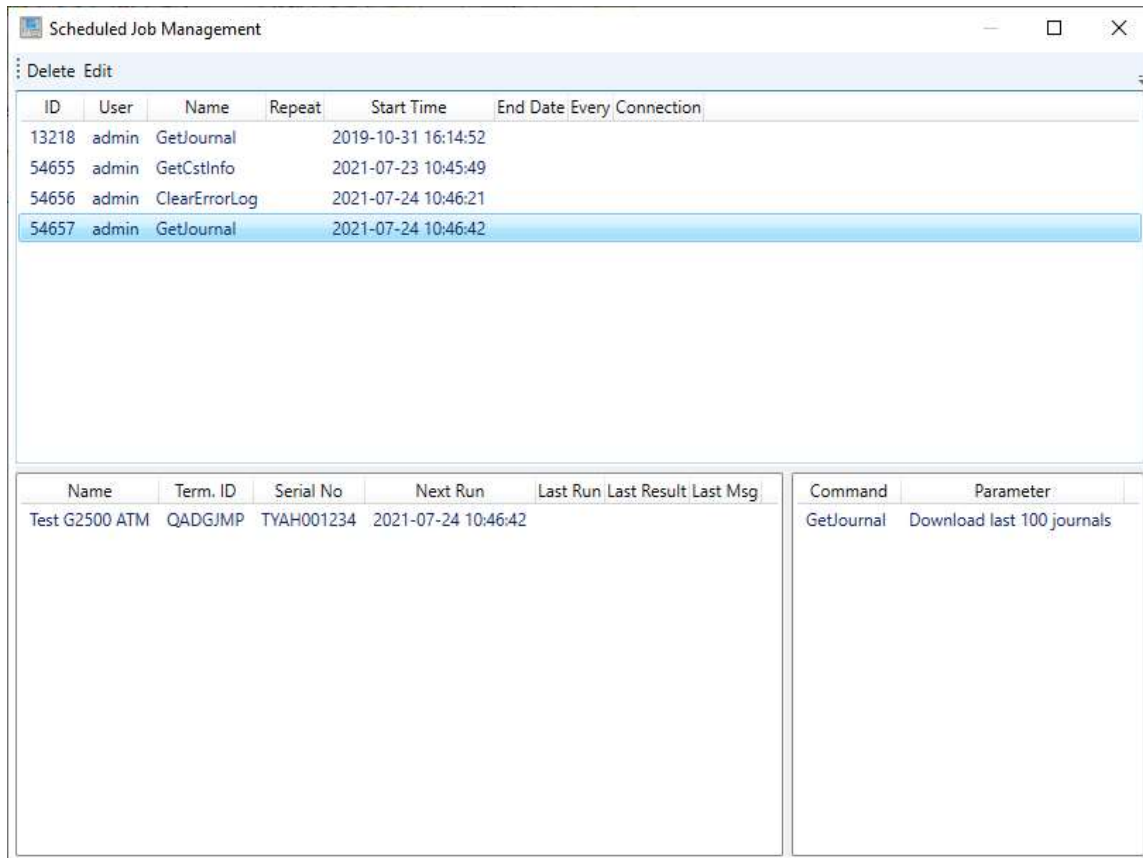
Clicking lines in the top panel are the various scheduled jobs by Name (first job being performed) and the scheduled Start Time.

If you click on an individual job from that panel, you can view the details from the two lower panels. In the example above that Scheduled Job is to pull 100 journals from ATM Serial TYAH001234 on 7/24 at 10:46 am (0-24h).

From the top of this screen, there are options to Delete an entry or to Edit an existing Job.

Click the job to highlight it and then click Delete or Edit.

Instant Job Manager

This menu shows a history of Jobs.

You can set a date range to view past or pending jobs, you can also check the 'Exclude done jobs' to only search for pending jobs or unsuccessful (failed) attempts.

Click on any of the jobs from the upper panel to see the details in the lower panels.

With a job selected, you can delete it from the list by clicking 'Delete' from the top of the window.

Job Result

From this window, you can view a history showing the result of all jobs that have been run by date range.

This can be useful if you're managing a lot of jobs and need to verify that data is being collected at the expected intervals or need to troubleshoot a specific ATM that is not connecting.

You can use the 'Delete' option at the top of the window to remove any entry by clicking on it first to highlight it.

GenRMS Professional

Tools Menu

This menu gives you access to additional applications within RMS to perform tasks such as Custom Advertisements / Remote File Loading / Charity List Editor (only available with PAI specific software) a Log Viewer for GenRMS and a Certificate Package Creator. There is also an Options menu for setting color indicators for Out of Service machines and machines reporting Low Cash levels.

BIN File Editor

This utility allows you to create and edit BIN files. These are lists of numbers that can be uploaded to the ATM and used to exclude specific cards from Surcharging or for verifying Debit / Credit.

Per the Genmega ATM Software manual, the BIN Lists are created and saved as a file named ExtraBIN.DAT - If you have of these files created previously, you can load it into this utility to edit, rename or view. Otherwise you can also use this editor to create a new BIN list by manually entering the numbers.
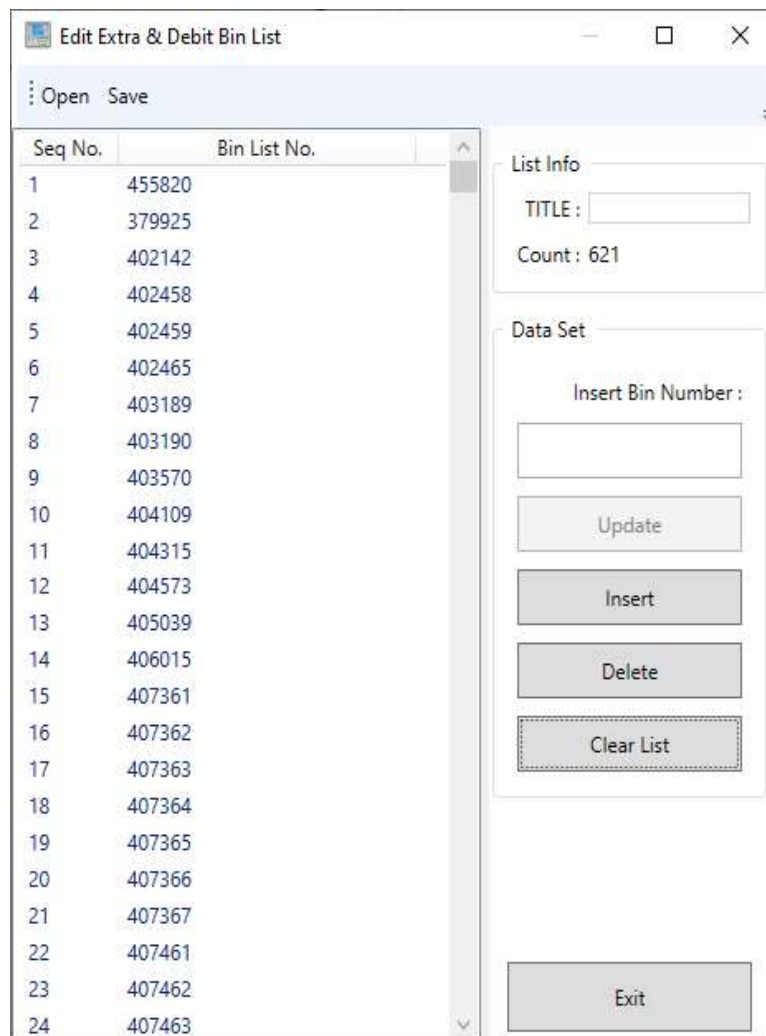
When a BIN file is loaded – you can scroll up and down to see the entire list. The total number of BIN numbers will be listed in the upper right corner as 'Count' .

Using this editor – you can click on any line to display the current number. If you wish to edit a specific number, click the line – edit the number in the box where it appear and then click 'Update'.

If you need to enter a new line / number, type the number into the box and click 'Insert' – alternately you can click any line and then click 'Delete' to remove any entry.

'Clear List' will remove the currently loaded file and refresh the editor.

When you're done editing – click 'Save' - you'll first be prompted with a box asking how this file should be stored:

Extra Bin = number that will be compared against the customers card prefix to determine if a surcharge screen should be shown or bypassed. If the customer card prefix matches a number on the list – then they will not see the surcharge screen for that transaction.

Debit Bin = Check cards to determine Credit / Debit (custom ATM software required)
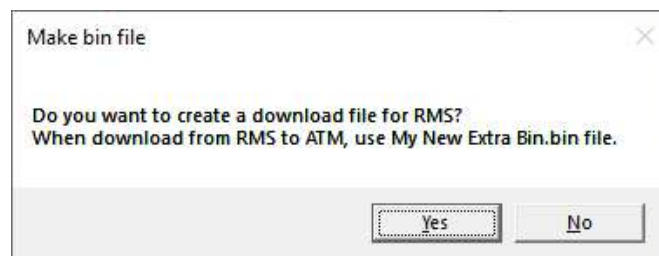
Next you'll be asked if you want to create a download file for GenRMS:

If you click Yes, you'll be asked to name the file (can be anything you'd like) and a file will be saved to your Documents folder in Windows under the GenRMS Pro subfolder.

If you click No – then the original ExtraBIN.DAT file that you opened to edit will be saved.

To upload this to the ATM, you'll need to add this new file to the Remote File Browser and create a job to Send Extra BIN file.

Image Pack Editor

This utility allows you to create custom advertisement packs to upload to your ATMs.

Ads can be customized for the following:

Branding = Custom backgrounds for 'Welcome', 'Processing' and 'Thank You' screens.

Advertisement = Up to 8 screens which rotate or change while the ATM is idle.

Liberty-X = Custom 'Buy Bitcoin' ads if the Liberty-X option is enabled

Welcome = Create a custom 'Insert your card' screen

Logo Image = ATMs with 3" Receipt Printers can support a custom receipt graphic.
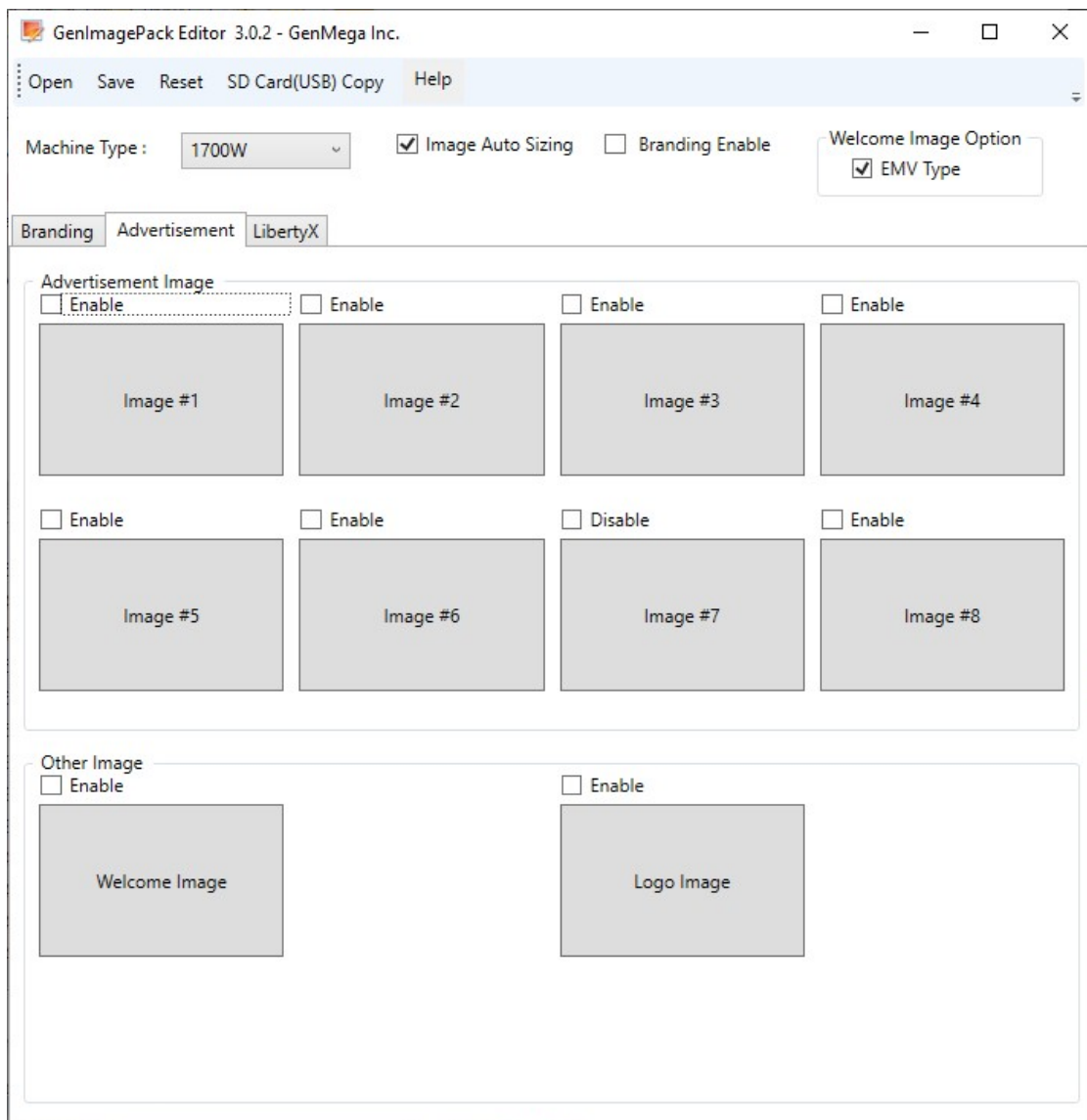
Any custom graphics would be created using some 3rd part graphics program. While this image packager can re-size existing images to fit the model you're creating for – we recommend that you create your images to the proper resolution – see below for model / resolution (in pixels)

Genmega:
G1900 / G2500 / G2900 / G3500 / GT3000 = 800 x 480
GT5000 / G6000 = 1024 x 768
Onyx (G3000) = 1280 x 800

Hantle:
1700W = 800 x 480
C4000 / T4000 = 800 x 600

Once you have created custom images for loading – and have selected the ATM 'Machine Type' from the drop down menu, click on the various grey boxes (Image #1 ~ Image #8) and then browse on your computer to where the custom images are stored. Below, images 1 through 4 have been selected.
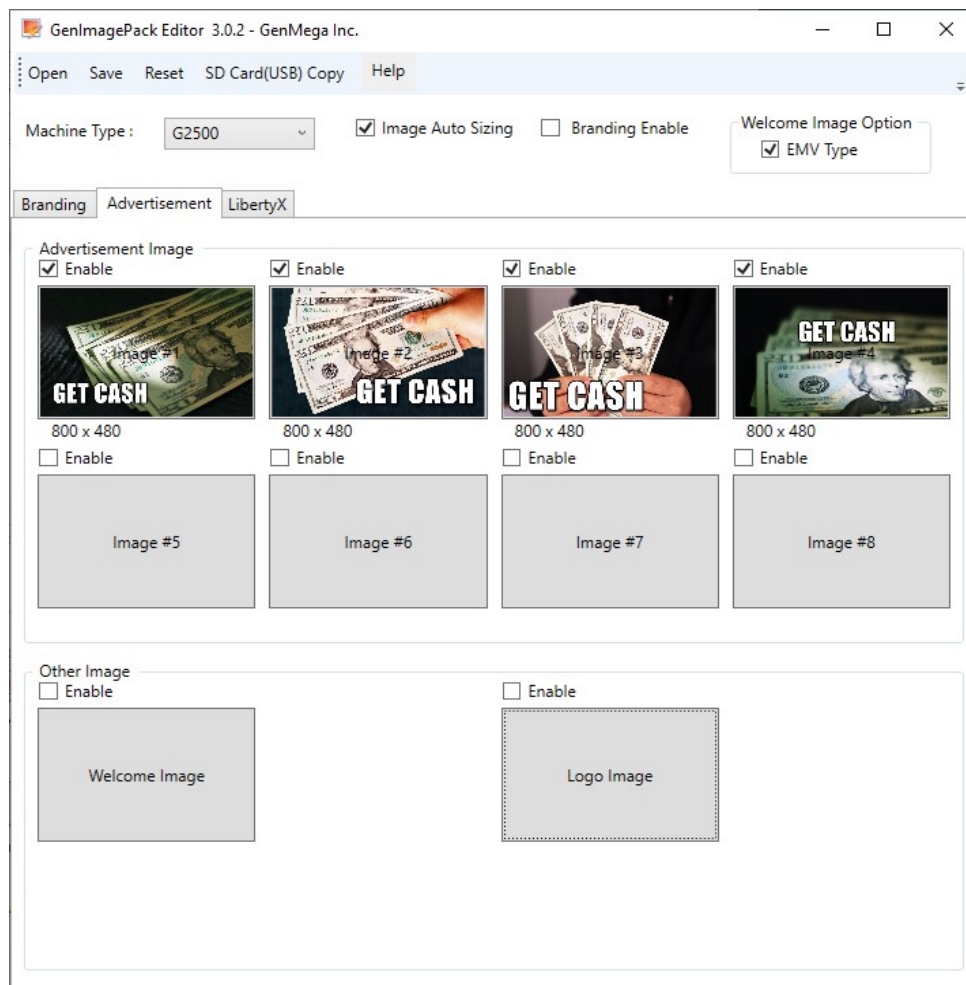
To proceed, you'll first need to 'Save' this collection of images – click Save at the top of this box and you'll be prompted to create a name for this collection – this can be any name you'd like.

This will save this collection as both a .LST file and a .BIN file to your Documents\GenRMSPro folder.

The .BIN file is the file you would send to the ATM to update the new images.

The .LST file is the collection of images / configurations you selected, so in the future if you'd like to edit this image collection and add or remove something, you can do so by using the 'Open' button at the top of the screen and recalling this .LST file. Each time you 'Save' it, the .BIN file will also be updated.

To load the images to an ATM or ATMs, you'll need to upload the new .BIN file into the Remote File Browser and use the 'Send Images' job.

Reset = Clears all settings in the Image Pack Editor

SD Card (USB) Copy = This option allows you to create a collection in the Image Pack Editor and save it to a USB or SD card so that it can be loaded directly at the ATM (rather than remotely through RMS).

Create or Open an existing LST file and click the SD Card (USB) Copy from the toolbar.

You'll be prompted to chose which drive you'd like the files copied to – and then you'll be promoted to chose which motherboard type should be created (ACU3/5 or ACU6):
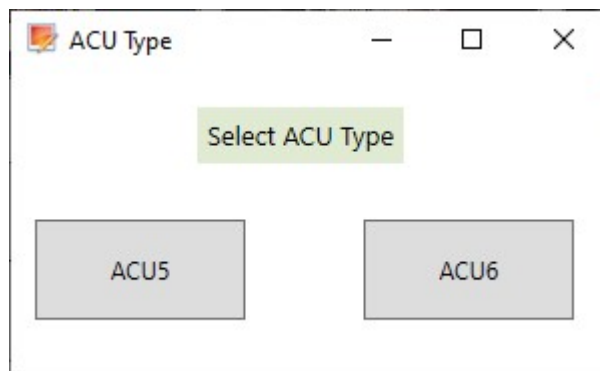
Once you chose the type the files will be copied over. Then install the drive into the ATM and reboot to copy the new advertisements.

ATM Log Viewer

The log viewer contains a record of all incoming and outgoing commutations between the ATM and the RMS Server. You can search by Date / Time and you can also search by 'ATM Name' or look for a specific message in the 'Msg' field.

Not that these logs can accumulate over time to several GBs of data. It's advisable to purge these logs from time to time or set a Scheduled Purge using the tools in the Database Backup / Restore Menu.

Certificate Package Creator

While GenRMS can be configured to encrypt data between the ATM and the GenRMS server using SSL/TLS keys – the program also allows for 3rd party or custom certificate files to be loaded for encrypting / validating data.

You would load these certificate (.PEM) files using this utility which will save them as a .BIN file in the Documents folder under GenRMS Pro.

Then use the 'Send Files' Job to apply the certificate to the ATM.

You'll need to enable 'Verify Host Certificate' option in the Remote Monitoring section of the Setup. See section for 'Set Setup' Job.
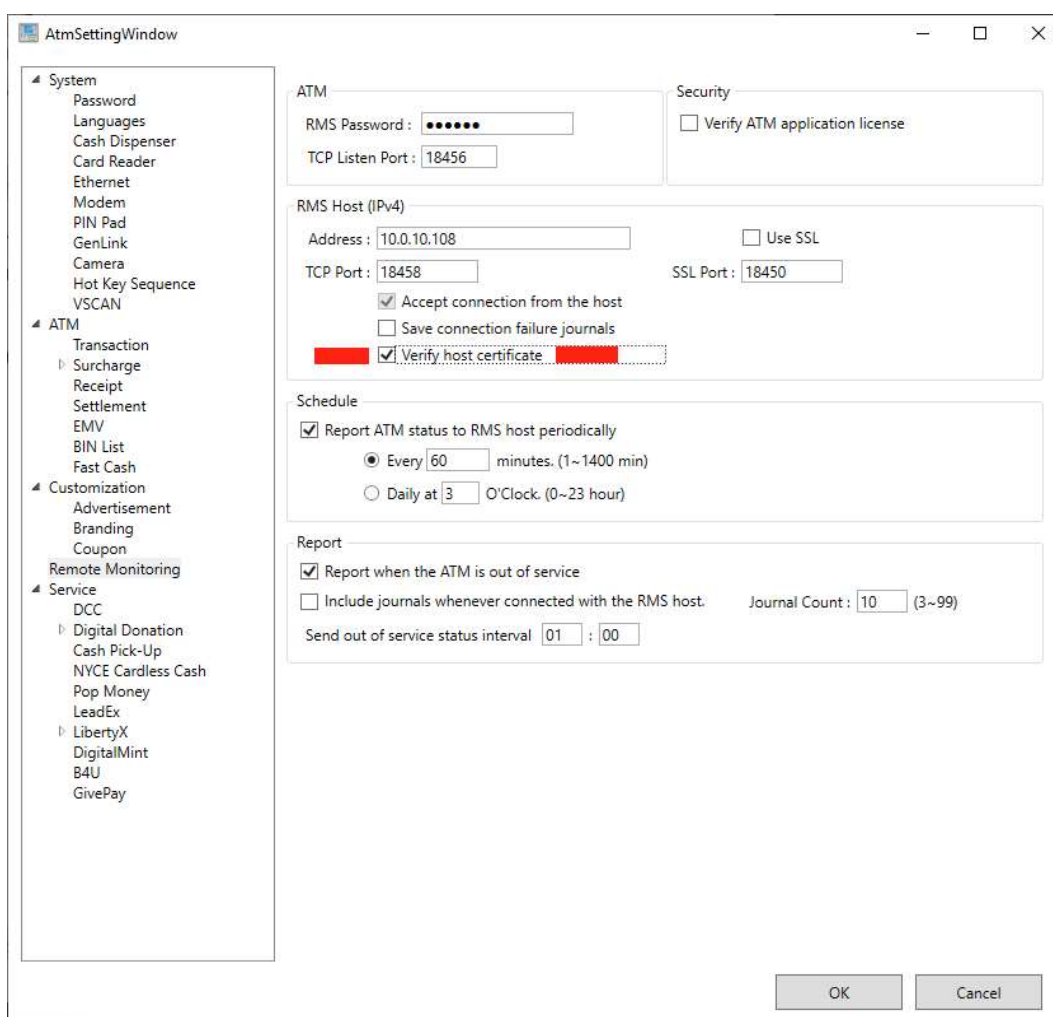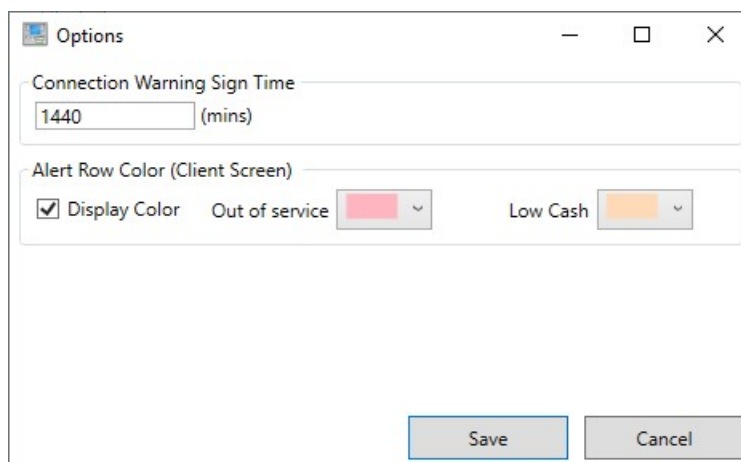
Tools Options Menu

This menu allows some options to help you identify potential problems or Out of Service machines more easily.

Connection Warning Sign Time = (default = 1440 min / 24 hours) If an ATM has not successfully contacted RMS within this period, then the ATM status icon in the Client Window will change from

'Good'   to 'Warning'

You can adjust how soon the status change will occur in the box below.

The other option allows you to place a colored bar over ATMs that are experiencing an Out of Service condition or are Low on Cash. You can specify the colors for both events. To set the Low Cash amount – use the 'Edit ATM' function from the Client Window and go to the Alert tab.

Below is an example of the Out of Service - red stripe across the ATM information, which makes it stand out among your list of machines.

Toolbar Icons

At the top of the GenRMS Client window are a row of icons to quick start common functions within RMS.

= This will 'refresh' the Client window

= Register an ATM. This will open the Register ATM window (same as Edit ATM). Use this to manually register an ATM into GenRMS Pro.

= Update ATM Status. This will open the Get Status Job for the selected ATM.

= Get Journal. This will open the Get Journal Job for the selected ATM.

= Reboot ATM. This will send a Reboot command to the selected ATM.

= Send File. This will open the Remote File Browser to choose a file to send to an ATM.

= View Journal. This opens the View Journal window for the selected ATM.

= View ATM Status. This opens the ATM Status Details page – same as if you double click an ATM from the Client Window.

= View ATM Setup Information. This will open the ATM 'View Setup' details (not for editing).

= ATM Remote File Explorer. For ATMs with bidirectional coms, allows remote downloading.

= ATM Job Result. This opens a list of previous Job results for the selected ATM.

 = View Error Codes. This will open a list of ATM error codes with descriptions and resolutions.

 = View RMS Logs. This opens the RMS Communication Log window. (in / outbound connections).

 = RMS Remote File Explorer. This opens the Remote File Browser window to upload / manage the file library.

ATM Groups

The left side panel in the GenRMS Client window is for managing your ATMs into Groups and sorting or searching based on different criteria.
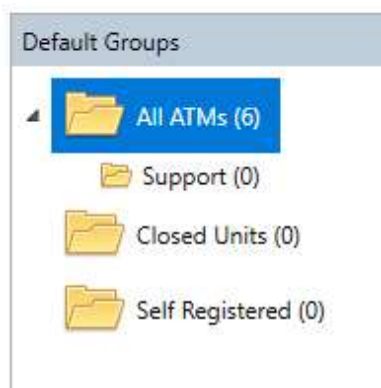
Click on the 'Group' folders to display the ATMs contained within them. Right clicking on these group folders allows you to:

Create a Group

Rename a Group

Delete a Group

To move an ATM from one group to another, there are several ways you can do that.

From the main ATM Status panel, you can drag and drop the 'Status' icon of an ATM over into the appropriate group folder to the left.

You can also right click on an ATM and go to 'Edit ATM' and select the Group Path at the top of the window:

ATM Sorting Tools

These icons which appear at the bottom of the ATM Group panel allow you to sort your machines into some useful categories or criteria. For some of these to work (ex. Location or Owner) you need to enter the appropriate information into the 'Edit ATM' window.

 = Home, this takes you to the 'Default Groups' list.

 = Location will sort ATMs by physical location (based on data entered in 'Edit ATM')

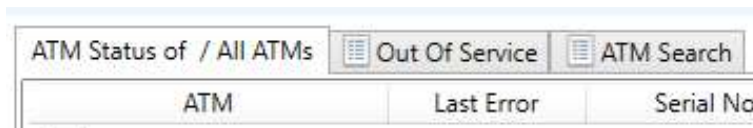 = ATM Model will sort your list of machines by the model name (G2500 / GT5000 etc)

 = Owner will sort the ATMs on the Contact Name (based on data entered in 'Edit ATM')

 = Custom Group will let you add an additional set of folders to group specific ATMs

ATM Status Panel Sorting

At the top of the ATM Status panel are 3 tabs which can be used to quick sort terminals.

Default is 'ATM Status of / All ATM' - which will show the status of the primary group (All ATMs).
If you click a different group folder on the left panel, then the full folder path will show on that tab name.

Out of Service
Clicking on this tab will show you only the terminals whose status is currently set to 'Out of Service' so you can quickly identify which machines may need attention. Like the 'Status' tab, if you select a different Group (folder) from the left panel – then you'll only see the Out of Service terminals from that specific group.

ATM Search
This tab allows you to search (All ATMs or a specific Group folder) for a specific ATM based on the following criteria:
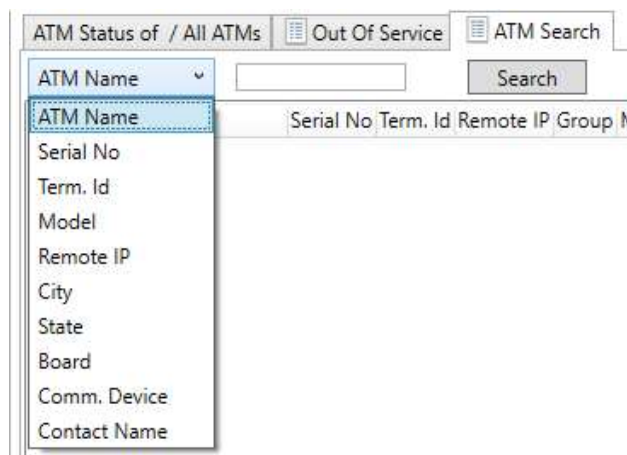

Select the search criteria from the drop down menu and type into the field box. Then click 'Search' to sort by that data.

Right-Click Menus

Right clicking on any individual ATM or Group of ATMs will give you access to most of the options and functions from the previous section of the manual, as well as some additional tools only available from this menu.

Below is the menu that opens when you right-click on a specific terminal.
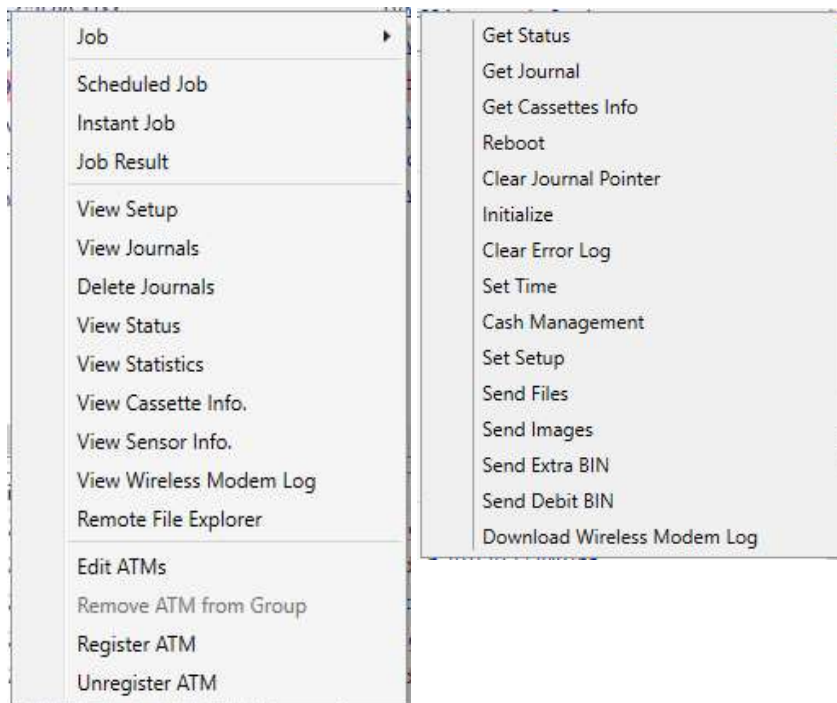
Job Menu

Click on 'Job' from the above menu to open the Job menu shown to the right.

Below are definitions for all Jobs available from the Job Menu.

Get Status

This pulls the current 'status' of the ATM along with the setup details. If the ATM is 'In Service' or 'Out of Service' the current cassette totals, application version, etc. All data you would find in the ATM Status screen columns is updated and the ATM Setup Configuration.

Get Journal

This will pull the electronic journal entries from the ATM. The Get Journal job allows you to specify how and which journals are pulled. Once Journals are downloaded into GenRMS, they will remain in the database until you've deleted them (Purge DB tools) or removed the ATM from GenRMS.

New Journals: Pulls all Journal records from the ATM since the last time you performed this job. If you have never pulled records for this ATM, it will download all Journals.

Last X Journal: Use the box to specify how many records you'd like to pull from the very newest going backwards.

By Date: Specify a Date Range to pull records from – you can also enter the last 4 numbers of a specific card to narrow your search.

Transaction Sequence Number: Specify a transaction sequence number (available from your Processor)

Card Number: Specify the last 4 digits of a card number for which you're searching for.

Once you've pulled Journals – you'll need to use the 'View Journal' function to see or print them.

Get Cassettes Info

This will pull all the details you'd normally find on a 'Trial Cassette Total' report pulled from the ATM.
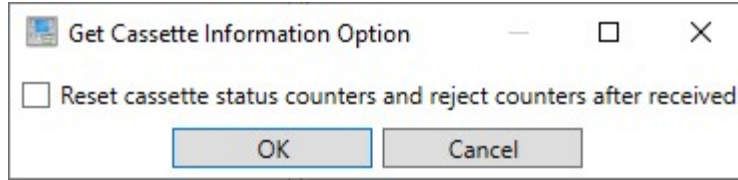
You'll be promoted with the above message before the job runs, checking the box will reset the reject counters, so that going forward you can collect new data.

To View the Cassette Info – right-click on the ATM and go to 'View Cassette Info'

Reboot ATM

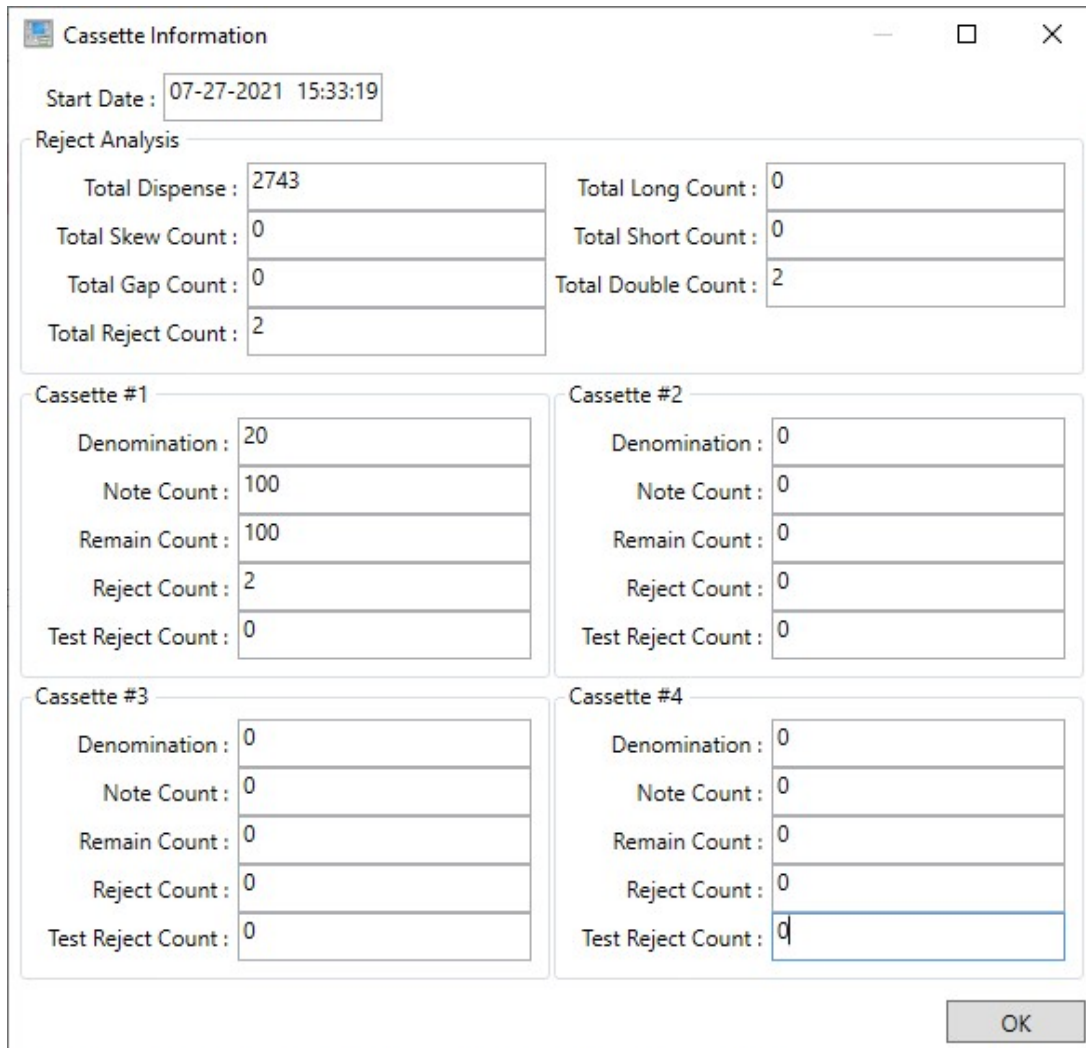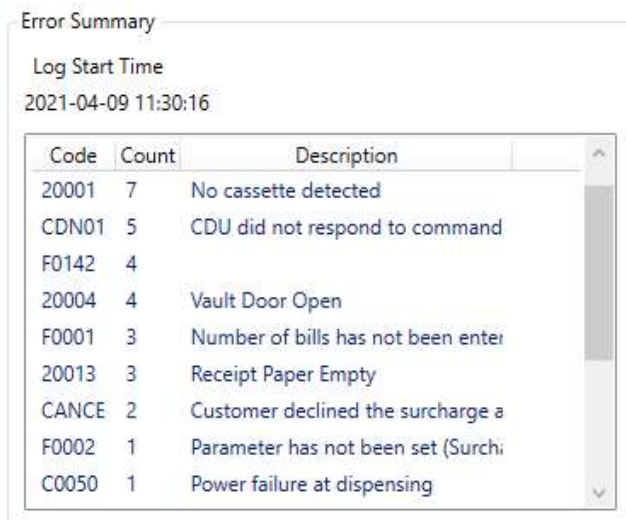This option sends a command to the ATM to Reboot the terminal – would be same as powering off and back on. Different from Initializing – which is what happens when you back out of the OP Menu.

Clear Error Log

This will clear the 'Error Summary' found in the Reports Menu of the ATM Operator Menu.

To view the Error Summary in GenRMS – double-click on an ATM in the Status Panel and you'll see the following in the bottom right corner:

Please note that after clearing the Error log – you will need to Get Status to pull the new report from the ATM – otherwise you'll continue to see the previous collected data.

Set Time

This allows you to change the date and time on the ATM. The options are to set a specific date and time or to Sync the ATM with the RMS PC.
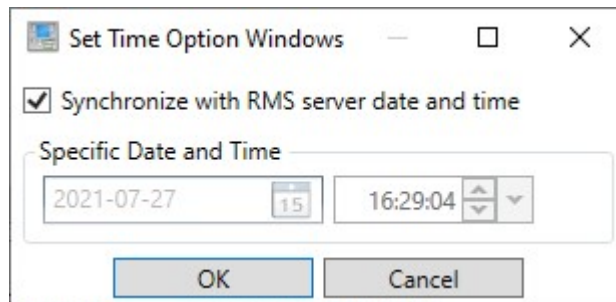
Cash Management

This menu provides the functions you'd find in the ATM 'Settlement' menu, including the ability to change the bill counts and to do Cassette Totals / Day Totals.

The 'Trial Cassette Total' or 'Trial Day Total' reports will update the Totals within GenRMS Pro and also add that report to the ATM Journal. If you run this report and then download the last few Journal records, you'll see the report.

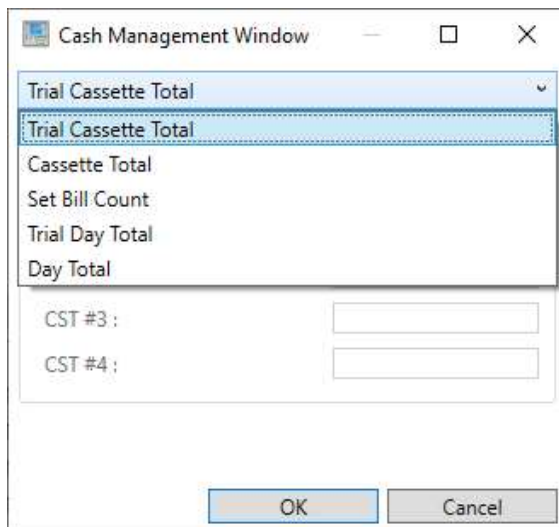Cassette Total / Day Total – these also work as if you're running them from the ATM – The Day Total report will reset your Terminals / Host totals and record that in the Journal.

The Cassette Total report, which zeros out the values in the cassette(s) – you'll need to enter the new number of bills otherwise the bill count will be zero, which will cause the ATM to go out of service (F0001 – Enter Number of Bills) – RMS will warn you before doing so that sending zero notes will result in the ATM going out of service.   This may be necessary if you need to take an ATM out of service because there are no bills.

To 'Set Bill Count' – choose whether to Add notes to an existing total amount – Set notes will replace whatever value is currently stored - Subtract notes will deduct the amount you enter from the stored amount. These work just as if you entered them from the 'Settlement' menu at the ATM.
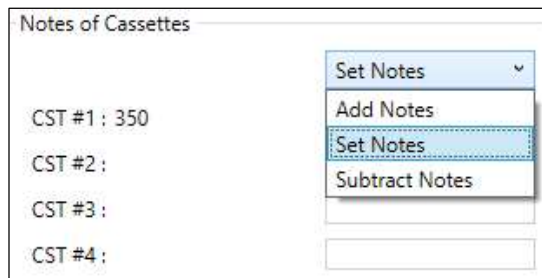
Set Setup

This job allows you to change virtually all setting / configuration at your ATM with the exception of Master Keys (must be entered via the ATM encrypting keypad) and the ATM Serial Number. This includes setup and configuration for the various extra services or applications like Bitcoin or Cardless transctions.
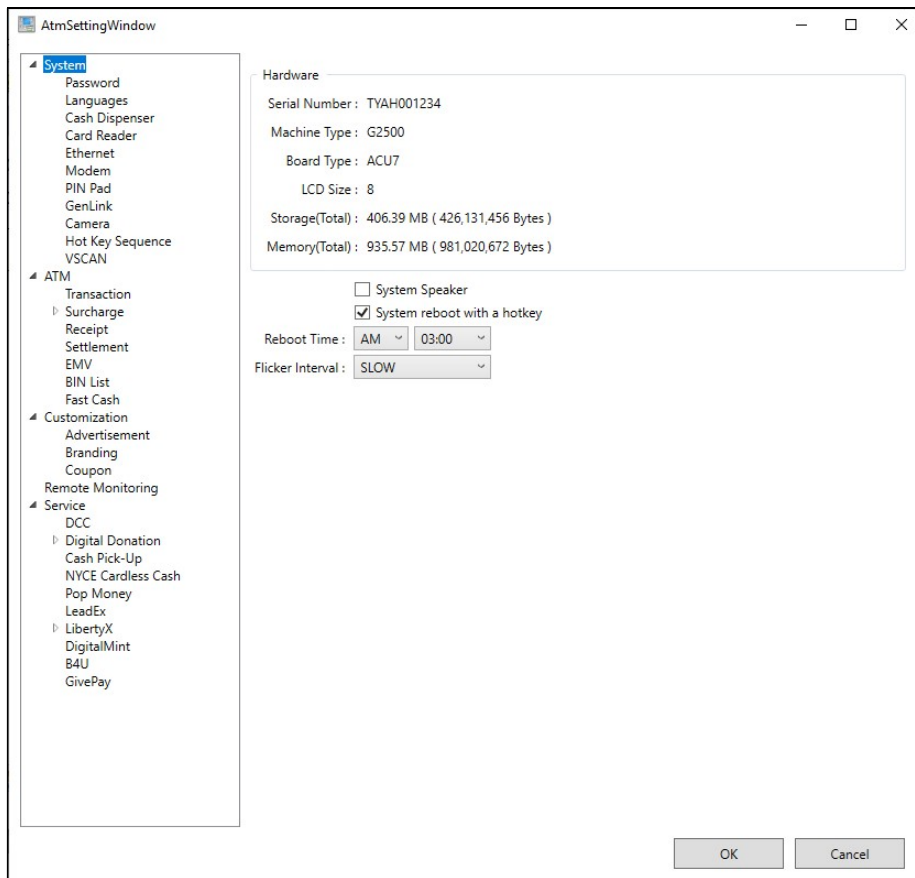
Click the Headings in the left column to view the options available to modify and send. Note that some options may be 'greyed-out' (unable to change) or may not show at all based on the version of ATM software loaded and the hardware configuration of the ATM your connecting to.

Set Setup also works for groups of ATMs – if you wish to change one setting across a group or groups of machines. Right click a group of ATMs and choose the 'Set Setup' job – however make sure that you only change the option you wish to apply to all those machines.

Another use for the 'Set Setup' job is to help program a terminal being setup or installed in the field. If the installer can program the basic RMS settings and perform a 'Test Call' from the ATMs RMS menu, once the machine appears in the 'Self Registered' menu, you can configure all the settings for that ATM

and have the job set to 'Run the job when ATM contacts server' in the Run Job screen. Then have the tech on site do another 'RMS Test Call' and the setup will be uploaded when the ATM connects.

Send Files

RMS allows you to update software on your ATM by sending the correct ATM application file using the Remote File Browser. This is where you store any ATM software files, graphics or BIN lists.
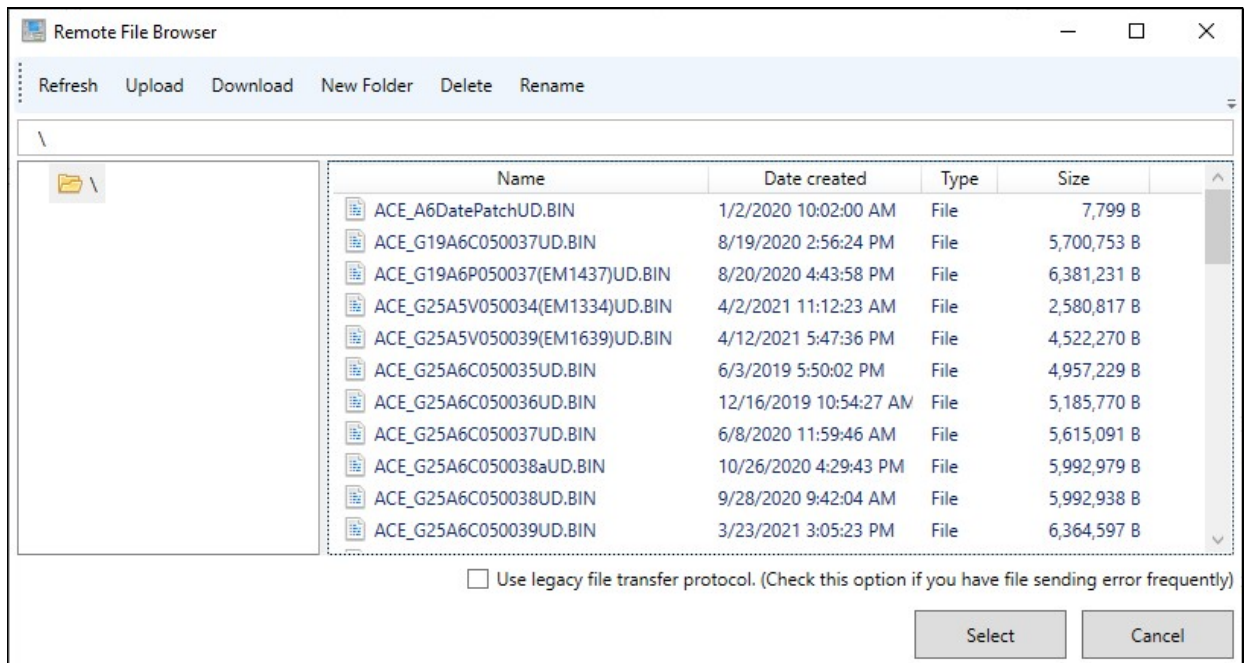
When Genmega distributes ATM software for loading via memory device (USB / SD card) there are several files that get copied to the memory device in order for it to be uploaded manually. However there is only one file that needs to be sent when updating use GenRMS.

First it's important to understand how the 'Program' or BIN (binary) files are named, so you can understand what file you're looking to upload.

Example: ACE_G25A5V050039(EM1639)UD.BIN

G25 = G2500 ATM (the model of the ATM)

A5 = ACU5 / ACU3 Mainboard

V050039 = ATM application version

(EMxxxx or CNxxxx) secondary version information

UD or ON = UD is Update (does not delete programming) / ON is a Full Install (will wipe out all programming)

When you download new software from Genmega – you'll look in the folders that you normally would copy over to the SD card or USB drive to find these ACE files.

Use the Remote File Browser to 'Upload' these files. Click 'Upload' and you can navigate your computer or memory device and select the appropriate file per above.

You can also create folders to help manage all the files – Clicking 'New Folder' will create folders and 'Rename' can be used to change the names of files or folders.

For example if you upload a BIN file called: ACE_G19A6C050037UD.BIN

It's ok to rename that file to 'G1900 ACU6 ATMPlus C050037 Update' so that it's easier to recognize which file you are about to upload.

You can use 'Delete' to remove files from the list – if you wish to remove a sub-folder you've created, make sure to delete any files from within that folder first.

☐ Use legacy file transfer protocol.

At the bottom of the screen there is a check box for 'Use Legacy File Transfer Protocol' – this exists for cases where you attempt to send a file to an ATM, however it's giving errors each time you try. Clicking this box will download the file much more slowly – which in some cases will allow the download to continue.

Update versus Full Install

Sending an Update file to an ATM will only update the version – not require reprogramming for terminal settings. You can also use this to go from a newer software to an older or previous version if needed. You can also use update to go from one software type (US Standard , ATM Plus, PAI) to another – it's ok to just replace one with another using an 'Update' file.

Full Install files on the other hand (end in letters ON) will delete all settings from the ATM and render it inoperable until someone can restore the basic programming. Do NOT send Full Install files to an ATM unless you have someone on site to program or you wish to intentionally take it out of service.

Mainboard Type

GenRMS will detect the mainboard type when the machine first connects and updates it's status, if you attempt to send a file meant for an ACU6 mainboard to an ACU3-5 (and vice versa) it will warn you that the mainboards types do not match. However if you ignore the warning it will still allow you to send the file which can take the motherboard out of service – which may require sending it back to Genmega for repair / reflashing.

Send Images

Send images will send ad campaigns that were created using the Image Pack Editor see GenRMS Pro Toolbar Menu → Image Pack Editor earlier in this manual.

Graphics packaged with the Image Pack Editor are saved to the Documents \ GenRMSPro folder on your computer. Click 'Upload' in the Remove File Browser and add the graphics file you saved.

Select the campaign from the Remote File Browser window and chose which ATM or ATMs it should be sent to. You can send the same graphics to multiple ATMs, however make sure that the model of ATM being selected matches the graphics you created. Example, if you created a graphics package for the Genmega G2500 – which has a screen resolution of 800x480 pixels, you can send that to any other ATM with the same screen resolution (1700W / GT3000 / G1900 / G2900 / G3500) – however you should NOT send that to an Onyx (1280 x 800) or a GT5000 (1024 x 768).

Unlike the Send File job which will check the ATM model type in effort to help prevent loading the wrong software to an ATM – the Send Image job cannot work that way, so it's possible to send the wrong sized images to a machine.

Send Extra BIN / Send Debit BIN

ExtraBIN lists are updated to the ATM from RMS via this Job. Using the BIN File Editor outlined earlier in this manual – click 'Upload' in the Remote File Browser and add the BIN file you created to the list. From there you can select the ATM or ATMs which will receive the BIN List file.

Note that Debit BIN is only available to software version that support that function.

Download Wireless Log

This refers to the now discontinued GenLink 3G modems - this is no longer supported.

Below Jobs in the Right-Click Menu are the following:

Scheduled Job / Instant Job / Job Result

These are shortcuts to the functions shown previously in the 'Job' menu at the top of the Client window.

By right-clicking on an ATM or Group of ATM and selecting any of the above items, it will open the Job Manager screen for that ATM or Group of ATMs – rather than having to select the specific ATM(s) when opening directly from the Job Menu at the top of the Client Manager window.

View Setup

Right clicking on an ATM or Group of ATMs and selecting View Setup will show you the current Setup Report configuration for that ATM or Group of ATMs. Note that you cannot modify settings from the View Setup report – you can only make changes from the 'Set Setup' Job.


When viewing or modifying the Setup from a Group of ATMs – if all the selected ATMs have the same setting 'Enabled' – you'll see a check-mark in the box, however if the group has some machines with that option enabled and some disabled – you'll see a black square (per above example). If you have an empty box, then none of the selected ATMs have that option enabled.

If you wish to change the value and have all of the ATMs either 'Enabled' or 'Disabled' you can click the black box icon and turn it into either a check-mark (enabled) or a blank square (disabled).

View Journal

This will open the Journal Viewer for the selected ATM – you have the option to select a Date range and also the 'Type' of transaction from the drop down menu.
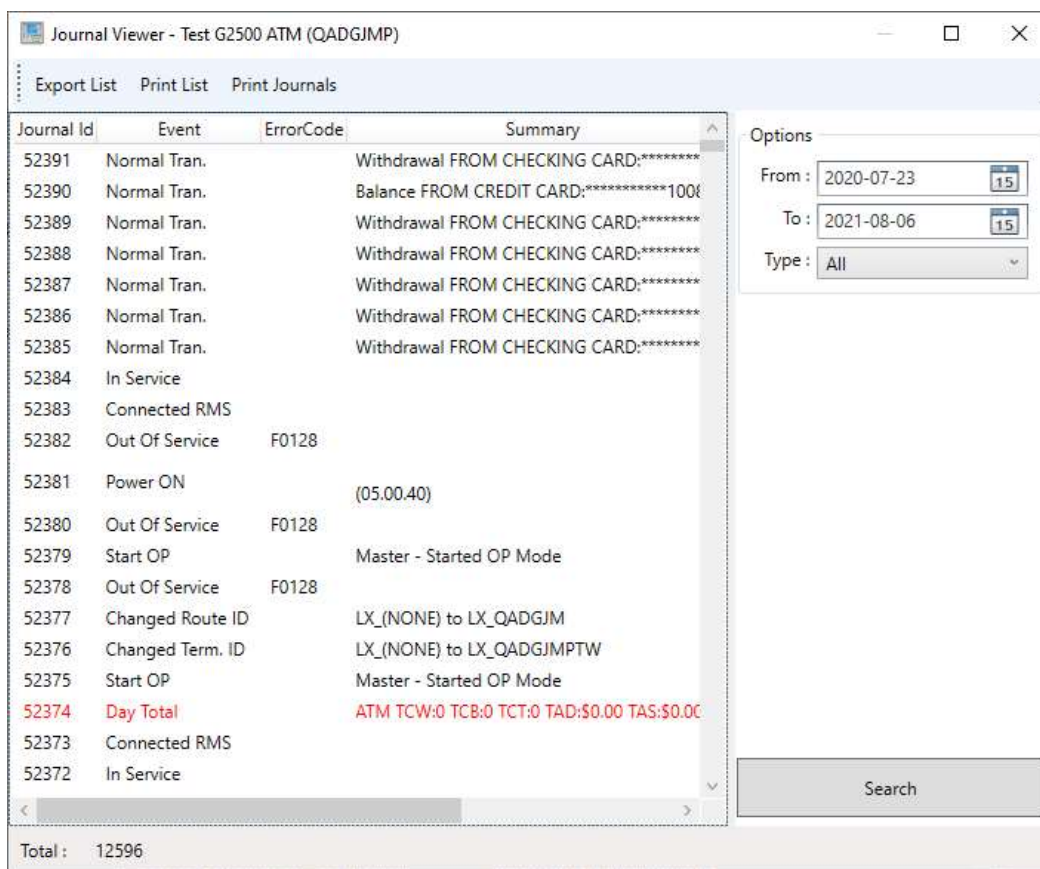
From the options at the top of the Journal Viewer, you can export all the Journal records to a CSV (Comma Separated Values) which can be opened with Excel. You can also move the column headings left and right (click and hold) to reorder the Journal information.

If you double-click on a Journal record, you can view all the details of that transaction include any photos take if your ATM is equipped with a GenCam device. This information can be printed from this detailed screen.
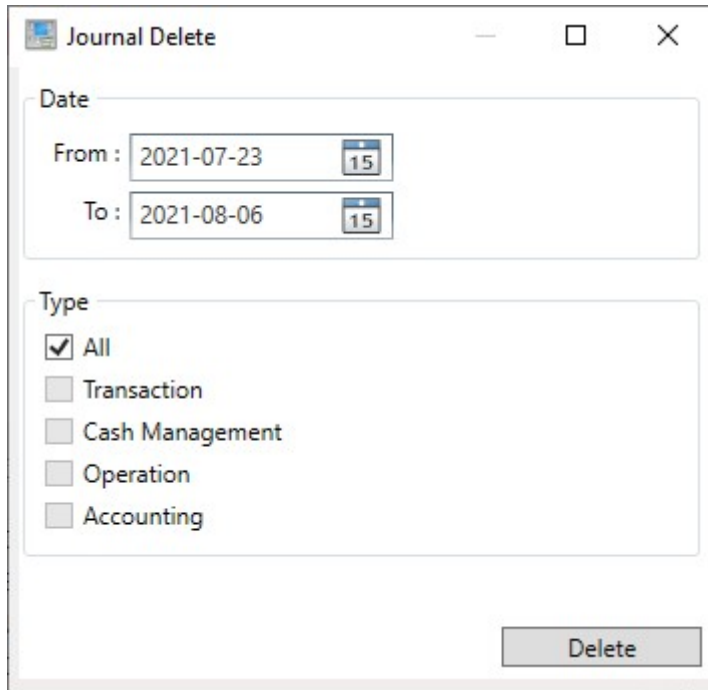
There are options at the bottom of this panel to save or
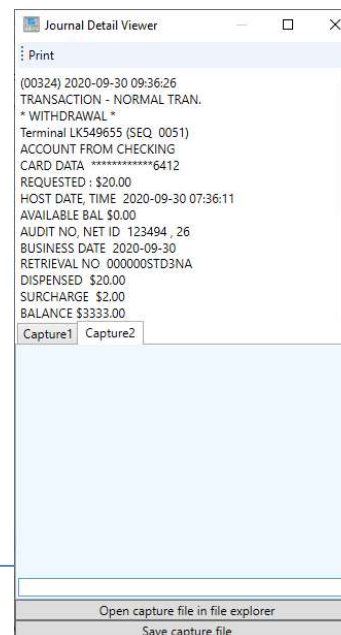
copy the GenCam photos as well.

Journal Delete
In order to clear up space and prevent the Database from exceeding its maximum allowed size (11GB) you can use this Journal Delete menu to purge unwanted entries from the database.

Select a date range and then the type of records you wish to delete.
*** Deleting these records will be permanent ***

The RMS Server Manager Menu has a database purge function described later in this manual – that allow you to delete older journals that no longer need to be saved for across the entire database. However there are limitations within SQL as to how much data can be deleted at once – this means that if you have lots of ATMS with Journals being stored, then you may have to delete small sections of dates at a time.

Using this Journal Delete tool will allow you to purge from one ATM at a time, which can help when the global purge tool is being overwhelmed.

View Status

Selecting View Status will pull up the following information screen for the ATM you've selected.
- Note you can also pull up this screen by double clicking on an ATM in the Client Manager Window.

This information is updated when you Request Status for an ATM.
Some of this information (like Location and Alert details) is pulled from the 'Edit ATM' menu. Note that if you make changes to the 'Edit ATM' menu, like address or alert settings, they will only update on this screen when you request a fresh 'Get Setup' job.

View Statistics

This statistics menu will pull information from all the available journal records for the selected machine.

Select a date range (or hour range) and the records pulled from the Journal records will provide the listed statistics – including error codes that were found during that same range.

The 'Dispensed Amount / Withdrawal' value is the average amount withdrawn per transaction.
In the above example – Dispensed amount = $1840 divided by Withdrawals = 15 is $122.67

Cassette Information

This report is updated from the 'Get Cassette Info' job – it contains the details from each available cassette(s) for that machine along with the 'Reject Analysis' report which shows the number of notes rejected for period of time (Start Date) and the reasons for the rejects.

To reset the 'Start Date' check this box below when doing the 'Get Cassette Info' job.
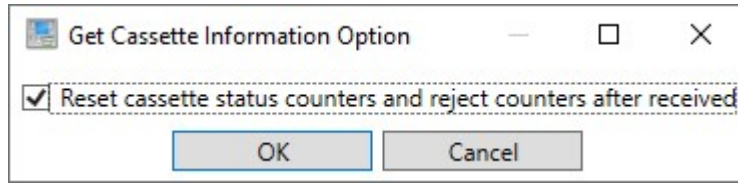
View Sensor Info

This function was added to ATM software as of 05.00.39 version (ACU6/ACU7 mainboards only) and requires GenRMS Pro V2.5.11 to support.

If a sensor error occurs at the ATM from the Dispenser (CDU) or Printer (RPU) or Card Reader (MCR) then that sensor status data is uploaded to RMS from the ATM to let you know specifically where the problem is located.   On the Client Window – ATM Status, a 'View Sensor' button appears, or you can manually right click and select 'View Sensor Info'.

Below is the Sensor Status
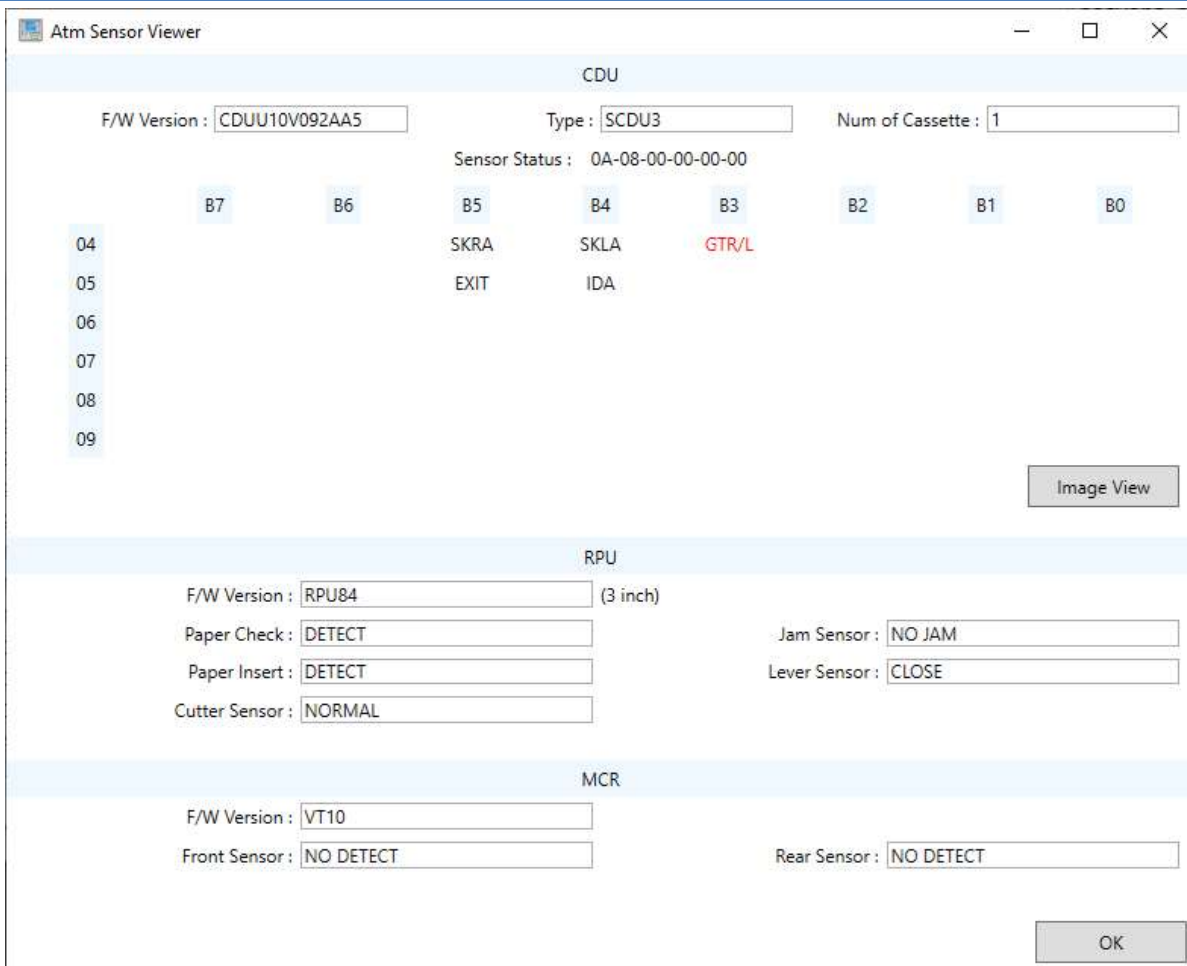
The top section is for the Cash Dispenser (CDU).

F/W Version will show the firmware version installed on the dispenser control board.
CDUU10V092AA5 = V09.2A.A5 is the firmware.

Type is the model of dispenser installed in the ATM (TCDU / SCDU / HCDU / etc)
Number of Cassettes installed in the ATM.

For 'Sensor Status' anything showing in [RED] means the sensor is currently blocked.
The values (GTR / EXIT / SKRA etc.) are the names of the individual sensors.

To see where the individual sensors are located – click the 'Image View' button and you'll see an illustration of the dispenser with the sensor locations marked.
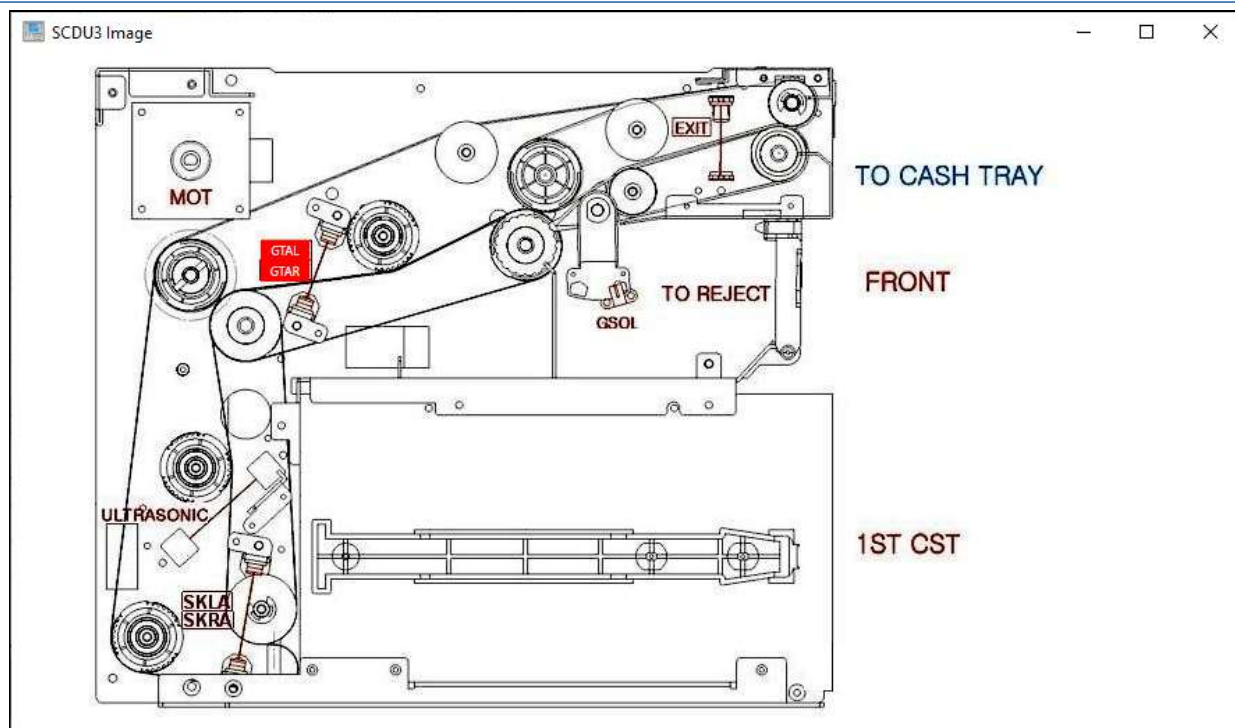
In the example above the GTR/L sensors are showing in red as blocked.

With this information you can provide the location or the tech on site with the specific sensors that are causing the problem.

The lower part of the ATM Sensor Viewer window shows the sensor status for the Printer (RPU) and the Card Reader (MCR). For example if the Printer Feed Lever is open, the text for 'Lever Sensor' will say **OPEN** in red. Once the error is cleared, you can recheck the sensors with a Get Status job.

Wireless Modem Log

This refers to the now discontinued GenLink 3G modems – it allowed downloading of log files related to those modems.   This function is no longer used.

Remote File Explorer

For ATMs where you have bidirectional communication (meaning you can connect from RMS to the ATM) – The Remote File Explorer will allow you to pull log files directly from the ATM.

If you're able to connect with the ATM – the window below will populate with any available files.
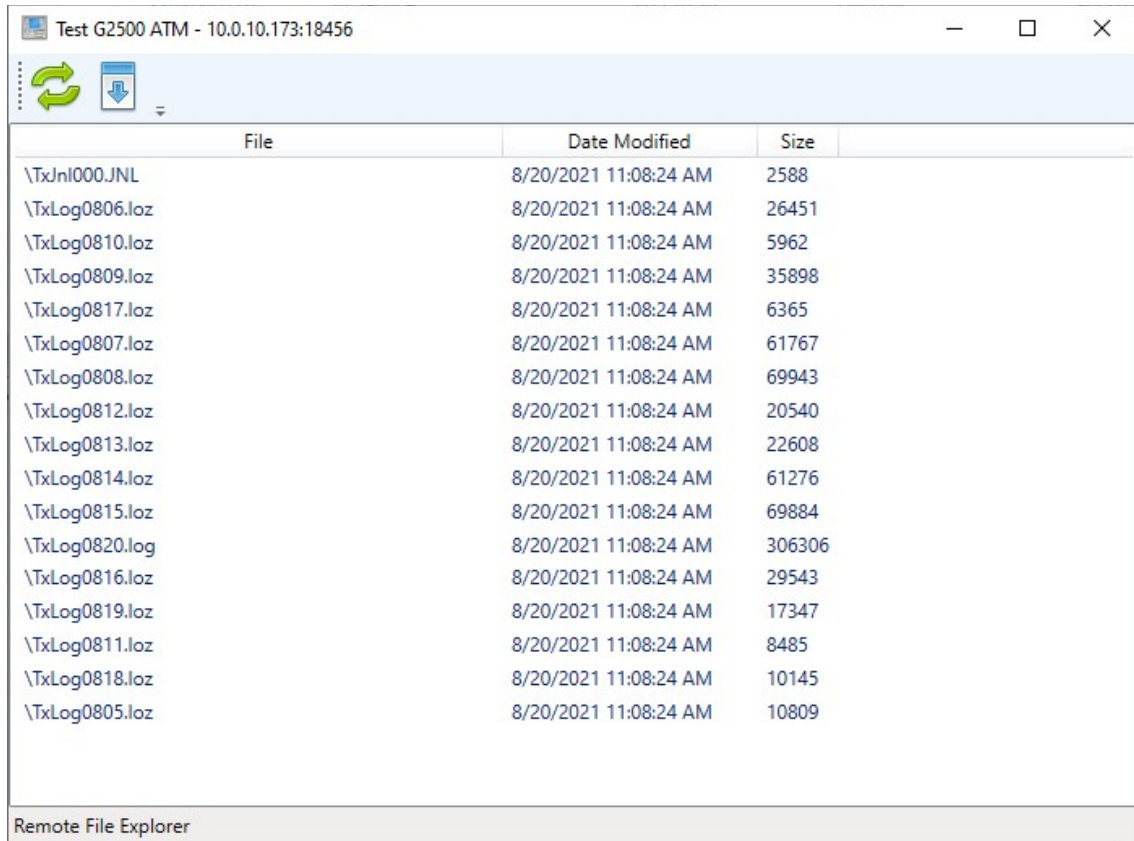
Click on an individual file or select several and then click the 'arrow' icon at the top to download.

By default it will save the files to your 'My Documents' folder, however you can select alternate location.

The green arrows icon at the top will refresh the list.

Edit ATM

This screen allows you set the communication parameters, details specific to the location or placement and also assign alerts / notifications.

Default Group
- Shows the current 'Group' that the ATM has been placed in – to change the group click […] button.

ATM Name
- This can be anything, the location name or any text that you would like to associate with this ATM.

Serial Number
- This cannot be changed and is the key index for the database. The serial is programmed at the ATM and should match the sticker in the top cabinet that was assigned during manufacture to prevent accidental duplicate entries.

RMS Password
- Default password = 333333 / when RMS connects to an ATM, both the Serial Number and Password are check before a connection is established.

Comm. Device
- Options are TCP/IP or Modem (dial-up)

Inbound Only
- The [   ] Inbound Only box should be checked if this ATM has One Way Communication – meaning that the ATM must connect into RMS to initiate communication.

IP Address and Port (TCPIP) or Phone Number (Modem)
- For ATMs where you have Bidirectional Communication or Wireless / Cellular Box – this field is where you enter the IP address. For ATMs on dial-up it will be the telephone number to the ATM.

Use SSL
- This option will encrypt all data being sent or received between the ATM and RMS with SSL encryption, same as the ATM transaction. Please note that RMS data is already encrypted, and we are not sending any sensitive data (like card numbers) in the messages. However if you'd prefer to use this higher level encryption, then you must first enable SSL on the ATM side (via Send Setup Job, or have someone on site enable that in the Remote Monitor Menu) – and then you should check this box to complete the setup. Note: if one side is set to SSL and the other side is not – you will not be able to communicate using RMS until these settings match on both ATM and RMS.

Update IP address automatically
- Checking this option will update the IP address of the ATM at each connection. This will be the IP address that the ATM is connecting from.

RMS Journal Auto Send
- When this option is checked, the ATM will upload 'new' Journal records at each communication. New Journals means anything that occurred since the last upload.
Note this can also be set from the ATM side in Remote Monitor Menu → Journal Send

Protocol Timeout
- Default value = 10000 ms / recommended to leave this value at default.

Memo
- This is a 'free text' field, you can add any notes or details about this ATM or the location.

Location
- If you click the 'Location' tab on the Edit ATM window, you can add the details about where this ATM is installed, including the time zone and the installation date.

Contact

- If you click the 'Contact' tab on the Edit ATM window, you can add details about contact personal or even technical contacts for this specific ATM / location.

Alerts

This tab in the Edit ATM window is where you set all the Alert options for GenRMS to send emails or text messages to people responsible for the ATM or anyone else that should be notified when there are issues with the machine. Email Alert setup is done in the 'Settings' menu on GenRMS Server which is covered later in this manual.

Alert Notification

- Checking this box will send Alert Notifications to anyone in the Email / SMS Recipient list.

Low Cash

- Check this box and setting a 'Limit' value, RMS will send an Alert as soon as the ATM cash amount reaches this threshold.   By selecting 'Send alert once' you will only receive one notification and not be re-notified each time the machine connects after the first notification was sent.

Service Status Change

- Sends an alert if the 'Status' of the ATM Changes – this is useful if the ATM has not checked in, and the status changes to 'No Connection' (yellow exclamation mark) – Normally you would be alerted if an 'Error' or Out of Service condition is reported.

Send Email / SMS at every connection

- As the title suggests, this will send an alert message any time the ATM connects to RMS.

Recipients

- The recipients are those that will receive email(s) or Text (SMS) messages when an Alert is sent.
If you're adding more than one email in that field, separate the addresses with a comma ','.

For 'texting' or SMS messages, you need to format the recipient phone number as an email address per below:

ATT = cell-phone-number@txt.att.net
Sprint = cell-phone-number@messaging.sprintpcs.com
T-Mobile = cell-phone-number@tmomail.net
Verizon = cell-phone-number@vtext.com

Please check with your cell phone carrier for more details. You can also see the above information if you click your mouse cursor in the 'Alert SMS' field.

Recipient Managing / Groups
You can set up ATMs individually so that each machine only goes to those responsible, however you can also manage Alerts based on a group of ATMs or even to all ATMs.

To do this, right-click on a group of ATM in the GenRMS Client window and select Edit ATMs.
Remember that any changes made this way will affect all machines in the group.

Note – when making settings for a Group or more than one ATM – if the individual settings between those machines are different, then you'll see a black square. This means that some ATMs in that group have the option enabled and some disabled. If you leave the square alone, those individual settings will remain the same – however if you click it and either check or uncheck the box, then all ATMs in that group will now have the same setting.

Register ATM
- Use this to manually add an ATM into RMS.

Unregister ATM

- This option will completely remove an ATM (and all of its data) from RMS. You can re-add the same machine again, however any saved data will not be restored.

GenRMS Server Toolbar

The GenRMS Server application has a row of icons which help to manage the Database and control some options for Dial-Up modems and the Email Alert system.

While the RMS Server is operating these menu items will be unavailable. You must 'Stop' the service before the icons will be come active.

Start / Stop RMS Service

These controls will Start (arrow) and Stop (square) the RMS Services. Specifically, ATMs can only connect and RMS can only process jobs and tasks with this service running. If you stop the service then no machines can connect. If you have a GenRMS Client window open and you stop the service, you'll get an error 'Exception connecting to the broker' and the Client window will close.

Backup and Restore Database

This menu allows you create backups of your RMS Database and also to purge unneeded data from the database in order to free up more space.

Within this menu, use the 'Schedule Setting' button to set up an automatic backup or data purge option.

If you intend on storing Journal records for a number of ATMs, this can fill up your database capacity over a period of time – therefore we highly recommend that you set a 'Purge Schedule' to delete

Database Settings

This icon will pull up the Database Setting menu (see section 'First Run of GenRMS Server Manager' at the beginning of this manual) – You shouldn't need to make any changes in this menu once GenRMS Pro is successfully installed.

Database Upgrade

Whenever you upgrade GenRMS Pro to a newer release – after installing the new Server and Client applications, you need to click this icon to 'update' the database to match any changes from the new version. This just takes a moment and only needs to be done once following an upgrade to GenRMS.

Log File

This icon is a shortcut to open the folder containing the GenRMS Pro Log Files. The log files are stored each day and contain every inbound / outbound connection and process that RMS does. These can be helpful for troubleshooting issue, however they can also take up a lot of space over time – so it's good to delete them from time to time using the Database Purge utility.

Settings

This menu contains several options including the setup for Email / Text alerts and also if your GenRMS Sever computer will use a Dial-up telephone modem.

Maximum thread count: This is maximum inbound / outbound connection that can occur at once. The default is 20

Use Custom Connection: GenRMS Enterprise version only ?

RMS Password Check: This compares the password from an inbound ATM connection with the password that is currently stored in 'Edit ATM' settings. By checking this box, if the passwords aren't matching, the connection will not be allowed.   This setting affects all ATMs stored in RMS.

Notification

The Notification tab is the setup for the Email / Text (SMS) Alert system.

You need to use an active email account as the launching point for RMS to send alerts or texts.

If you're using a Gmail or Yahoo (ect) – do an internet search for how to SMTP settings for your email provider – that will give you the address & port and whether or not SSL is required for setup.

Once setup – use the 'Test Email Setting' to verify that it's working.
(put a recipient email in the field to test with).

Default Recipients - Email or Text (SMS) are addresses you wish to receive all alerts and messages. You can also set the recipients at the individual ATM or Group level using the 'Edit ATM' screen. You can add multiple addresses to these fields, just make sure they are separated by a semi-colon, not a comma.

Ignore Error Codes – This allows you to specify certain error codes that you don't want to be alerted to, for example if the vault door is opened (code 20004) you may not want to receive those alerts.

Modem Bridge

If you are going to use a Dial-Up modem(s) on your GenRMS Server PC, then you'll need to enter this tab and select the option for 'Use Modem Bridges'.

Before GenRMS can use your modem, it first must be installed and recognized by Windows as a device. Follow the manufacturers instructions and use the appropriate driver so that you can see the modem listed in Device Manager (Windows).

In Windows Control Panel – you can search Phone and Modem to see more options related to modem setup. However once you've properly setup the modem in Windows, then RMS can begin using it to dial out.

Some notes regarding Modem / Phone Lines:
Most telephone lines are now part of your internet service which means they're VOIP (voice over IP) rather than the old 'analog' phone lines.