



ADDENDUM
TO TRITON CONNECT
USER MANUAL
(OAR AND T.O.T.C.C. FEATURES)

VERSION 1.0

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SECTION 1

INTRODUCTION

WHAT'S IN THIS ADDENDUM

This Addendum to the ATM Operations Manual describes the new OAR (Open Account Relationship) features offered by the latest release of Triton Connect ATM monitoring software.

The Addendum contents are spread across the following sections:

Section 1 - Introduction. This section gives a summary of the new features offered by the OAR-enabled version of Triton Connect ATM monitoring software.

Section 2 - Terminal Parameters. This section describes how to access and configure a terminal's OAR functions (if the terminal is OAR enabled), using Triton Connect's Set Terminal Parameters function.

Section 3 - T.O.T.C.C Call Scheduling. This section describes how to schedule *Terminal Originated Triton Connect Calls*, which enables Triton Connect to place pending operations "on hold" until a triggering call is received from a specified terminal. This section also shows how to configure the expiration time of T.O.T.C.C. calls.

TERMINAL PARAMETERS

New terminal parameters for OAR enabled terminals are listed below:

1. **OAR. SWITCH.** The OAR (Open Account Relationship) Switch enables you to turn ON or OFF the availability of OAR customer features.
2. **OAR BINS.** Use this function to store a list of OAR BINs (Bank Identification Numbers) in the ATM. The ATM can then recognize OAR customers by comparing the stored list to the BIN on their bank card.
3. **TRANSACTION TYPES.** New transaction types have been added for OAR customers. These transactions enable withdrawal, transfer and balance inquiry operations for combinations of:
 - Bank/ Brokerage Account Categories
 - Primary and Secondary Account Categories
 - Standard accounts (Checking, Savings, Credit Card)

4. **ACCOUNT TYPES.** The following account types are available to OAR customers (Note: Checking account access is available by default):
- Savings
 - Money Market
 - Bank & Brokerage
5. **T.O.T.C.C.** The T.O.T.C.C (Terminal Originated Triton Connect Calls) feature calls a Triton Connect Host PC on a scheduled basis, during which any pending operations can be performed.
6. **SURCHARGE.** The SURCHARGE LOCATION and SURCHARGE MESSAGE parameters have been modified. The surcharge location setting is fixed at BEGINNING and the surcharge location option is no longer available for OAR enabled terminals.

T.O.T.C.C

The T.O.T.C.C feature enables a terminal to call a Triton Connect PC on a scheduled basis, during which any pending operations can be performed. Ideally, calls should be scheduled to take place after normal business hours, or during other times chosen to minimize conflict with the shared phone line. Using this feature, operations can be earmarked for execution only by a corresponding T.O.T.C.C call from the terminal.

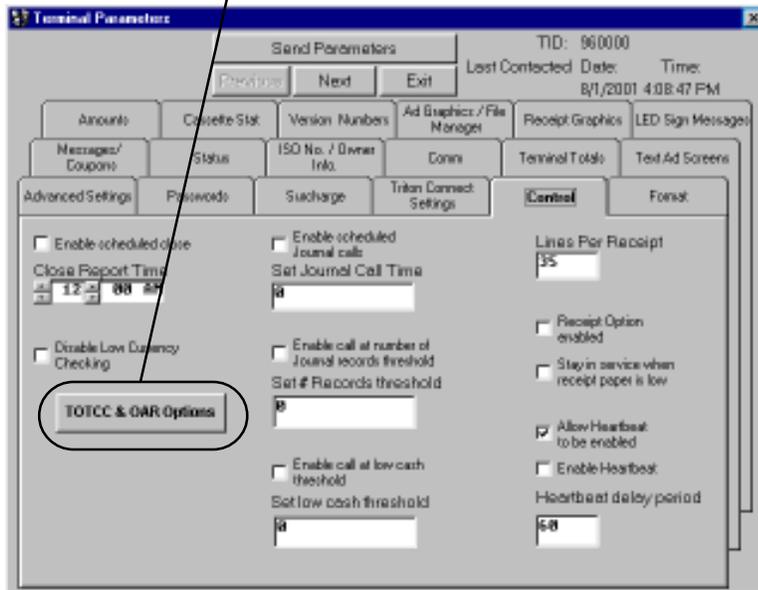
For OAR enabled terminals, the Call Scheduling dialog provides a feature that enables a scheduled operation to be placed in the Call List until triggered by a T.O.T.C.C call from a terminal. The expiration time of these calls can also be configured.

SECTION 2

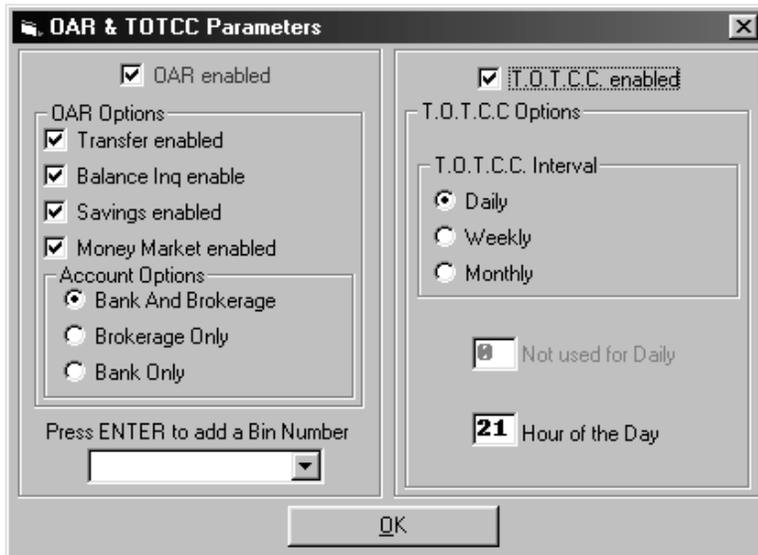
TERMINAL PARAMETERS

INTRODUCTION

When using the View or Set Terminal Parameters functions, if an OAR enabled terminal is selected, a button appears on the Control tab, as shown here:



Clicking this button brings up the OAR Parameters dialog:



Accessing Terminal Parameters

1. Start the Terminal Manager application.

2a. If you want only to view parameters: at the Terminal Parameters menu, select the View Terminal Parameters option.

2b. If you want to change parameters: at the Terminal Parameters menu, select the Set Terminal Parameters option.

3. Once the Terminal Parameters screen appears, select the ID of the terminal you want to work with, using the Select Terminal ID drop-down list. If you are setting parameters, the Broadcast option will be available, allowing you to select more than one terminal.

Note: See Section 3 of this Addendum for more information on using the Broadcast feature for calls to T.O.T.C.C. and/or OAR enabled terminals.

4. Click the View Parameters button. The Select Terminal window is replaced with selection tabs for the various categories of terminal parameters, as shown here:

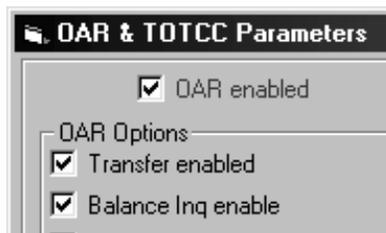
The OAR Parameters dialog box provides access to the following OAR parameter areas:

- Enabling/Disabling OAR Option.
- OAR Functions.
- Enabling/Disabling T.O.T.C.C. Option
- T.O.T.C.C. Options.
- T.O.T.C.C. Interval
- OAR BINS

The following paragraphs show how to configure the various parameter options in these areas.

ENABLING/DISABLING OAR OPTION

The OAR. (Open Account Relationship) option enables you to turn ON or OFF the availability of OAR customer options at the terminal. To turn OAR customer account and transaction type options ON, place a check in the OAR OAR Enabled checkbox:



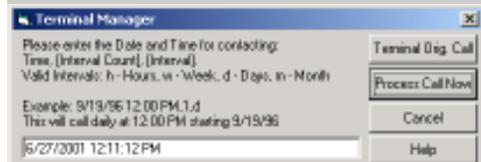
To turn OAR customer account and transaction type options OFF, remove the check.

If the OAR option is ON, the ATM will compare the BIN (Bank Identification Number) on the customer's card to the list of BINs that have been stored using the OAR BINs function. If the BIN on the card is found in the list of stored BINs, the ATM will display OAR account and transaction options to the customer. If the BIN on the card is not found in the stored list, only standard (Non-OAR) account and transaction types will be displayed to the customer.

If the OAR option is OFF, the ATM will display only standard (Non-OAR) account and transaction types to the customer.

Send Parameters

Once you've made the parameter changes you want, click the **Send Parameters** button (in the Set Parameters dialog box) to bring up a call scheduling dialog:



If the terminal supports the T.O.T.C.C. feature, the dialog box offers two options for handling the call:

1. **Terminal Orig. Call**
2. **Process Call Now**

If the **Terminal Orig. Call** button is clicked, the call will be placed in the Call List to await an activating call from the designated terminal. The T.O.T.C.C. call will be processed if the call from the terminal is received **after** the scheduled time and **before** the call expires. See Section 3 in this Addendum for more details on the T.O.T.C.C. and Call Expiration functions.

If you want the call to be handled as a normal (non-T.O.T.C.C.) call, click the **Process Call Now** button. The changes you made will be sent to the selected terminal (or terminals, if the Broadcast feature was chosen) at the scheduled time.

OAR FUNCTIONS

OAR TRANSACTION TYPES

The following transaction types/account categories are available to OAR customers:

- Transfer
- Balance Inquiry
- Savings
- Money Market (For OAR customers only)

These transactions enable withdrawal, transfer and balance inquiry operations the following types of accounts:

- Bank/Brokerage Accounts
- Checking, Savings, Credit Card

Place a check in a checkbox to turn ON (checked) or turn OFF (unchecked) that transaction type or account category.

ACCOUNT OPTIONS

The following account category types are available to OAR customers:

- Bank Only
- Brokerage Only
- Bank & Brokerage

Select an option to turn ON (checked) or deselect to turn OFF that option. **Note that one of the options will always be selected.**

The screenshot shows a configuration window with two sections. The first section, 'OAR Options', contains four checked checkboxes: 'Transfer enabled', 'Balance Inq enable', 'Savings enabled', and 'Money Market enabled'. The second section, 'Account Options', contains three radio buttons: 'Bank And Brokerage' (which is selected), 'Brokerage Only', and 'Bank Only'.

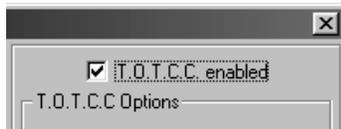
ENABLING/DISABLING T.O.T.C.C.

For installations where terminals do not have a dedicated phone line, the ATM cannot reliably be contacted by the Triton Connect host computer. Consequently, operations such as remote software downloads, BIN updates, etc., are not consistently accessible. The T.O.T.C.C. (Terminal Originated Triton Connect Call) feature addresses this problem.

The T.O.T.C.C. feature enables a terminal to call the Triton Connect PC on a scheduled basis, during which any pending operations can be performed. Ideally, calls should be scheduled to take place after normal business hours, or during other times chosen to minimize conflict with the shared phone line. At the Triton Connect PC, operations can be earmarked for execution only by a corresponding T.O.T.C.C. call from the terminal.

The benefit of this feature is that calls take place at times that are more convenient and advantageous from the terminal's perspective, rather than being driven by arbitrary schedules at the Triton Connect Host PC, which may not reflect such operational constraints as limited phone line availability, or other limitations.

To turn the T.O.T.C.C. option ON, place a check in the T.O.T.C.C. checkbox:



To turn the T.O.T.C.C. option OFF, remove the check mark from the checkbox.

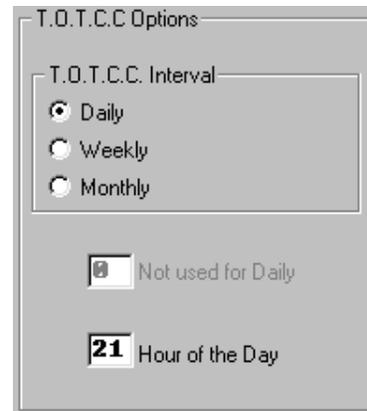
T.O.T.C.C. OPTIONS

T.O.T.C.C. Interval

When the checkbox is checked, the **T.O.T.C.C. Interval** options become available. T.O.T.C.C. calls can be set to occur on a recurring basis, with any one of the following intervals:

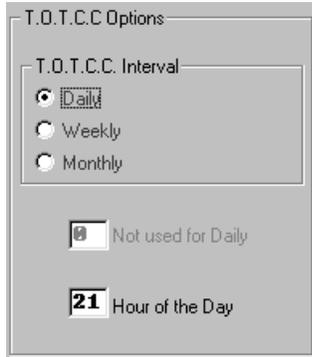
- Daily
- Weekly
- Monthly

To choose an interval, select it from the available **T.O.T.C.C. Interval** options.



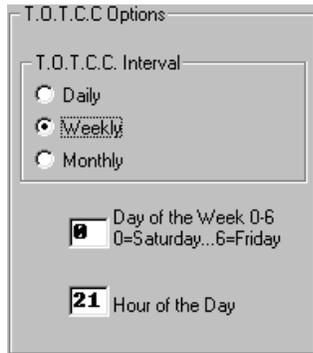
Once a calling interval has been chosen, establish the time of day at which the terminal will place the T.O.T.C.C. call. Follow these steps to establish the calling time:

1. If the **Daily** interval is selected, the **Hour of the Day** field is enabled.



Enter the time of day at which to place the call, in 24-hour clock format (using the numbers **0-23**), in this field.

2. If the **Weekly** interval is selected, the Day of the Week and Hour of the Day fields are both enabled.



Enter the day of the week on which to place the call, using the numbers **0-6** to represent the days SATURDAY, SUNDAY, ...,FRIDAY respectively, in the **Day of the Week** field. Enter the time of day at which to place the call, in 24-hour clock format (using the numbers **0-23**), in the **Hour of the Day** field.

3. If the **Monthly** interval is selected, the Day of the Month and Hour of the Day fields are both enabled.

Enter the day of the month on which to place the call, using the numbers **1-28** to represent the first 28 calendar days of any given month, in the **Day of the Month** field. Enter the time of day at which to place the call, in 24-hour clock format (using the numbers **0-23**).

OAR BINS

This function enables the ATM to recognize OAR customer cards using the BIN (Bank Identification Number) on the card. The terminal will compare the BIN number stored on the customer's card to all BIN numbers loaded. If the card BIN matches a loaded BIN the ATM will offer OAR functionality to the customer. If the BIN on the card does not match the ATM will offer NON-OAR options to the customer.

The terminal can store up to **10** OAR BINs.

To add a BIN, perform the following steps:

1. Click the mouse cursor in the Bin Number entry field.

2. Type the BIN in the field and press ENTER.
3. Repeat steps 1 and 2 until all BINs are entered (up to ten).

REDUCED ISO NUMBERS IN OAR TERMINALS

Note: Normally, up to 100 ISO numbers can be stored in a terminal; however, OAR-enabled terminals allow only 90 ISO numbers to be stored.

To remove a BIN, perform the following steps:

1. Open the Bin Number drop-down list by clicking on the down-arrow.
2. Select an existing BIN from the drop-down list.
3. Double-Click the number to highlight it.
4. Press the DELETE key on the keyboard to remove the number. Respond to the pop-up dialog to confirm the delete operation.
5. Repeat steps 1 and 4 to remove any additional BINs, as required.

NOTE: If the OAR option is OFF (OAR transactions are disabled), OAR BINs are treated as BLOCKED ISO numbers, to prevent surcharging of OAR customers.

SECTION 3

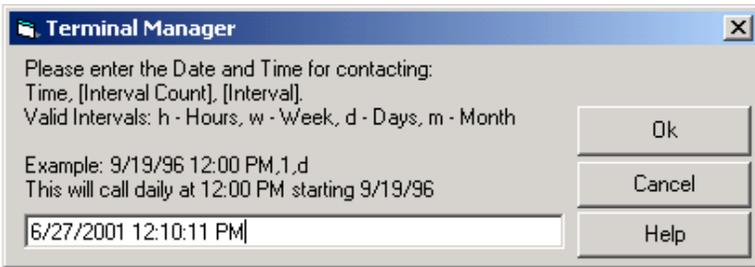
T.O.T.C.C. CALL SCHEDULING

CALL SCHEDULING

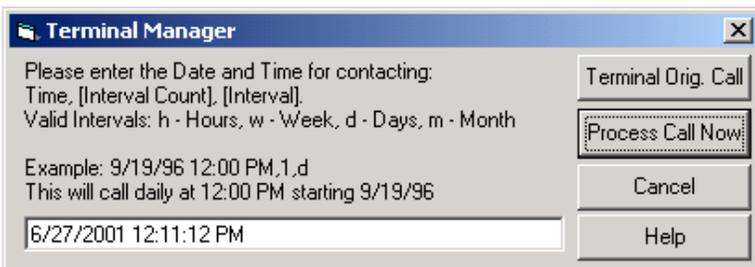
For T.O.T.C.C. and/or OAR enabled terminals, the Call Scheduling dialog provides a way to use the T.O.T.C.C. feature to place a scheduled operation in the Call List to wait for a triggering contact from a terminal.

Once you've selected the terminal(s) you want to work with, and specified the parameter options you wish to apply or operations you wish to invoke (such as a software download or journal retrieval), you will typically schedule a call to the selected terminal(s). Using the **Get Terminal Data** dialog, you will click the **Get Data** button to view a **Call Scheduling** dialog.

If the selected terminal is OAR enabled (or the OAR status of the terminal has not yet been determined), the following non-OAR style call scheduling dialog will appear:



If the selected terminal is OAR enabled, the following dialog will appear:



To place the call in the Call List as a Terminal Originated Triton Connect Call, click the **Terminal orig. Call** button. The call will be placed in the Call List, and will wait until an activating call is received from the terminal, or the call expires, whichever occurs first. If you wish to place the call in the Call List as a standard, scheduled call to be placed by Triton Connect, click the **Process Call Now** button.

Call Scheduling

Refer to Chapter 5 in your Triton Connect User Manual for more information on the call scheduling function.

T.O.T.C.C. Feature

For more information on the T.O.T.C.C. feature of Triton Connect, see Section 2 of this Addendum.

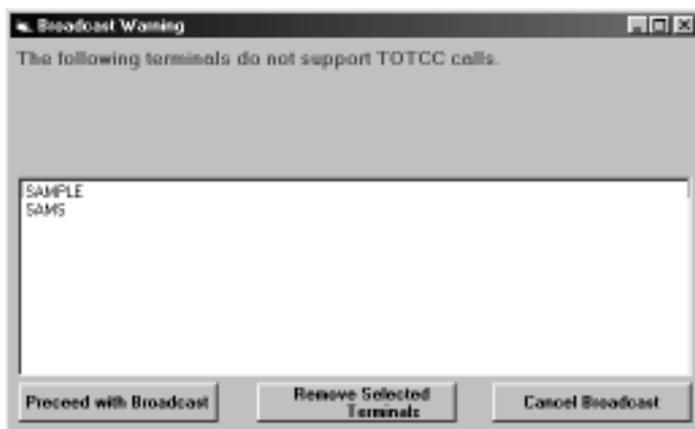
T.O.T.C.C. Call Expiration

See the next section for information on T.O.T.C.C. Call Expiration Time configuration.

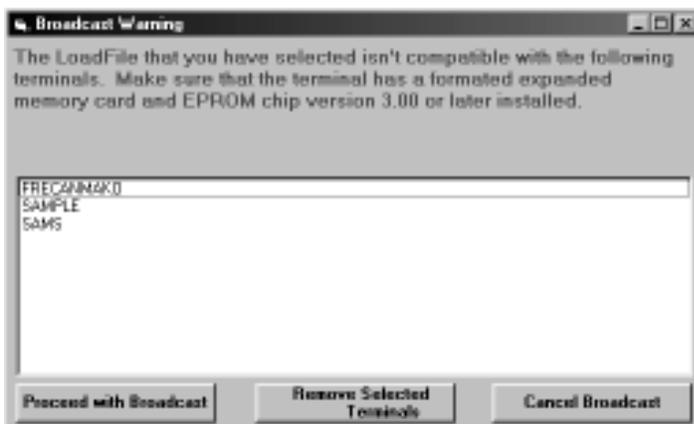
BROADCAST FEATURE

Although Triton Connect supports broadcasting to T.O.T.C.C. enabled terminals, calls for *non-T.O.T.C.C.* terminals will not be processed if they are included in the same broadcast operation with T.O.T.C.C. terminals!

If you select Broadcast through the *Set Terminal Parameters* or *Get Terminal Data* functions and choose a mix of T.O.T.C.C. enabled and standard terminals, a warning message will be displayed: "**The following terminals do not support TOTCC calls.**" as shown in the following dialog:



If you select Broadcast calls through the *Software Download* function and choose a mix of T.O.T.C.C. enabled and standard terminals, a warning message will be displayed: "**The Load File you have selected isn't compatible with the following terminals. Make sure that the terminal has a formatted Expanded Memory Card and EPROM chip version 3.00 or later installed.**" as shown in the following dialog:



Tips on Highlighting Multiple Entries in a List

You can use the following two methods to quickly highlight multiple items in a list of terminals:

SHIFT-CLICK. To highlight a series of terminals that are contiguous (that is, they follow one after the other with no breaks), simply hold down the SHIFT key and click on the first item, then the last item. Release the SHIFT key. All entries from the first to the last will be highlighted.

CTRL-CLICK. To highlight multiple items that are not contiguous, hold down the CTRL key and click on each entry individually, anywhere in the list. Each of the selected entries will be highlighted. Once the last entry is selected, release the CTRL key.

Software Download Precaution

A Broadcast Warning will be displayed only if Triton Connect cannot determine if a terminal can handle the download.

If you are certain a terminal indicated in the warning message has the required hardware (Expanded Memory Card and EPROM version 3.00 or higher), you can leave the terminal in the list; otherwise, you should remove the terminal from the list before proceeding with the download!

The dialog will list all the terminals that DO NOT support the current broadcast operation. You can choose from the following options:

Proceed With Broadcast

Select this option to proceed with the Broadcast operation. Note the following precaution:

For T.O.T.C.C. Broadcasts. If a warning message appears it means Triton Connect cannot determine whether the listed terminals support T.O.T.C.C. calls. You should only proceed if you are sure each listed terminal supports T.O.T.C.C. calls and the T.O.T.C.C. calling function is enabled at the terminal! Otherwise, remove the terminal(s) from the list!

For Software Downloads. If a warning message appears you must make sure the terminals indicated meet the minimum hardware requirements (Expanded Memory Card and EPROM version 3.00 or higher) before proceeding with the broadcast! Remove any terminal that does not meet these requirements from the list before proceeding with the broadcast!

Remove Selected Terminals

Highlight individual non-T.O.T.C.C. terminals and click this button to remove them from the broadcast list.

Cancel Broadcast

Cancel the broadcast for all terminals.

T.O.T.C.C. EXPIRATION TIME

This feature enables you to manage the lifetime of T.O.T.C.C. calls you place in the Call List.

Once a T.O.T.C.C. call has been placed in the Call List, using the procedure described in the previous section, the call will wait until the designated terminal contacts the Triton Connect host PC, at which time the specified Triton Connect operations will be performed.

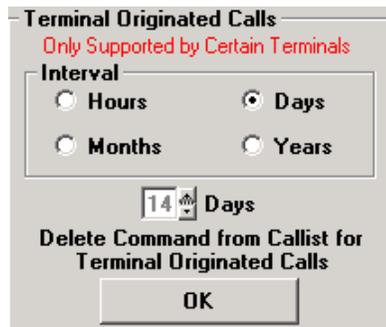
If the call from the terminal is not received when scheduled, the corresponding call in the Call List may not be activated when intended. If the events specified in a call must be performed within a certain time window, and would not be appropriate once this window of opportunity has passed, it may be advisable to adjust the expiration time for the call to limit its lifetime.

On the other hand, you may wish to provide an extended lifetime for T.O.T.C.C. calls, particularly in cases where the contact from the terminal may not be received for days, weeks, months or even years in the future.

ACCESSING THE TERMINAL ORIGINATED CALLS EXPIRATION TIME DIALOG

1. Start the Terminal Manager application.
2. From the Terminal Manager main menu, select **Setup/Options/ Terminal Orig. Calls Expiration Time**.

The following dialog appears:



Select the expiration Interval and specify the length of the interval, in Hours, Days, Months or Years, as applicable. Click OK to accept the settings.

IMPORTANT!

The settings you make in the Terminal Originated Calls Expiration Time dialog apply to ALL T.O.T.C.C. calls in the Call List!

