datacap
systems, inc.

NETePay 5

Director

Installation and Configuration Guide

Director and Manager

V5.07

Part Number: 8650.00

NETePay Director Installation & Configuration Guide

Revised: 7 Jun 2023

Version Support

This document supports the following application versions:

NETePay 5 Director - Version 5.07.XX / Version 5.08.XX

CONTENTS

OVERVIEW

Introduction

About NETePay 5 Director

NETePay 5 Director is a unified software licensing and automatic upgrade system for use with Datacap's ePay server products, such as NETePay Hosted, NETePay Classic, GIFTePay and others.

Benefits of NETePay 5 Director

NETePay 5 Director streamlines installation, licensing and updates of Datacap ePay server products.   Compared to standalone ePay server installs, *NETePay 5 Director* supports the following enhancements:

- Only one serial number and license to manage for all ePay products installed on a particular PC hardware platform.

- Automatic updates over the Internet for all installed ePay products without user intervention.

- Remote installation and management of ePay server configurations remotely using Datacap's PSCS (Payment System Configuration Server).

How it works

NETePay 5 Director is installed as a system service that starts automatically when Windows starts. The Director service automatically launches any installed and activated ePay software (e.g. NETePay, GIFTePay) servers(s) for processing transaction requests from clients.

The Director service also supports an interface in the Windows tray called Manager. The Manager application interoperates with the Director service to allow a user to suspend or restart the running ePay servers and provide access to the ePay server User Interface for running ePay software.

The Manager also supports installations automatically of ePay servers that are originated in Datacap's PSCS (Payment System Configuration Server). PSCS access over the Internet affords for the complete management of a merchant's ePay software environment, including installation, feature control and version updates.

INSTALLATION

Introduction

This chapter explains how to install and configure the *NETePay Director* components.

You will need to install all the components on the server on which you will be running NETePay or other ePay server products.

Requirements

Baseline System Configuration

To successfully install and run *NETePay Director* on your server, it should meet or exceed the following system requirements necessary to run NETePay or other ePay software product:

- Microsoft Windows Server 2012 R2, Windows Server 2016, Windows 7 SP1, Windows 10 or Windows 11. All latest service packs, updates and hotfixes must be applied.

- 4 GB of RAM minimum, 8 GB or higher recommended

- 50 GB of available hard-disk space

- Microsoft Internet Explorer with 128-bit encryption, Microsoft Internet Explorer 6.0 or higher recommended

- TCP/IP network connectivity.

- Persistent Internet Connection (DSL, cable, frame relay, etc.)

Download NETePay 5 Director Software

The *NETePay 5 Director* installation is available for download from Datacap's Software Download website at:

<div align="center">

http://www.datacapepay.com

</div>

Click **Get Started**, then Click **NETePay 5**, select **Director and Manager**.

Click the **Download** button for the Director and Manager.

After agreeing with the Terms of Use, the download of the install package will begin.

The *NETePay Director* installer package is supplied as a self-extracting executable and includes the NETePay Director application for Windows 7 SP1, Windows 10, Windows 11, Windows Server 2012 R2 or Windows Server 2016 operating systems. Double click on the downloaded file to start the installation.

Note: Before you begin installing the *NETePay Director* and its components, you should close all unnecessary programs and disable any anti-virus software.

You must be logged in as an 'Administrator' to install NETePay Director and all of it's components. Installations performed when logged on as another user with rights less than 'Administrator' will not operate correctly.

Install NETePay 5 Director Software

Important Note:

NETePay 5 Director is activated and programmed over the Internet so a working Internet connection is required for installation and activation.

1. Double click on the downloaded NETePay Manager Installer EXE file to start the installation. The following InstallShield Wizard will start. Click **NEXT** to continue installation.


2. The Datacap End User License Agreement (EULA) will be presented. Scroll to read the entire agreement. If you agree to the terms of the EULA, click in the radio button **I accept the terms in the license agreement** and then click **NEXT** to continue.
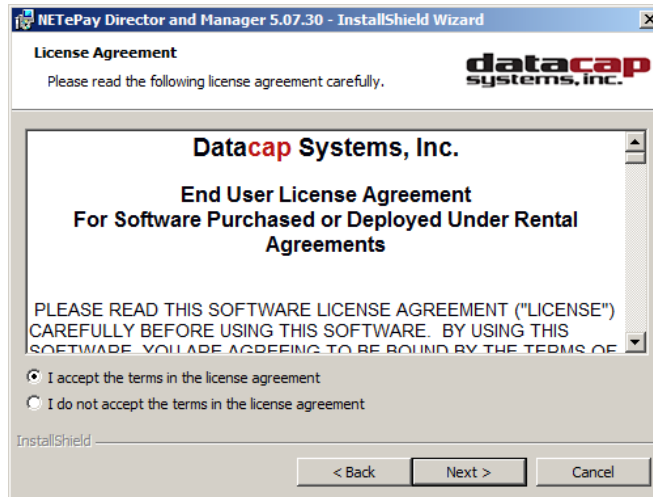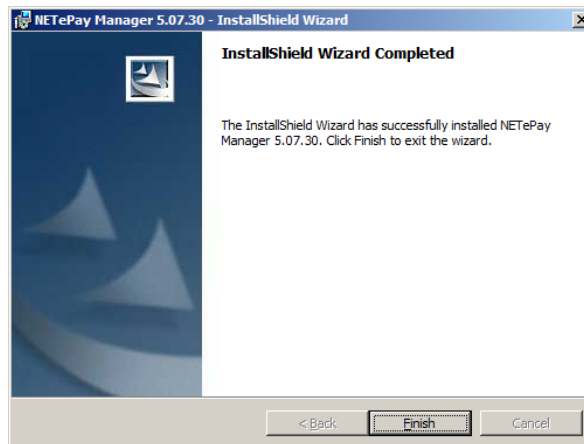
3. Enter you User Name and Organization name and click **NEXT** to continue.
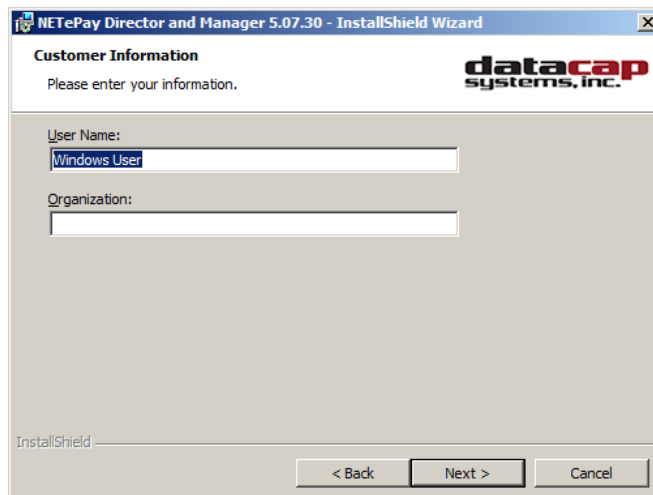
4. Review your entered information and if accurate click **INSTALL**.
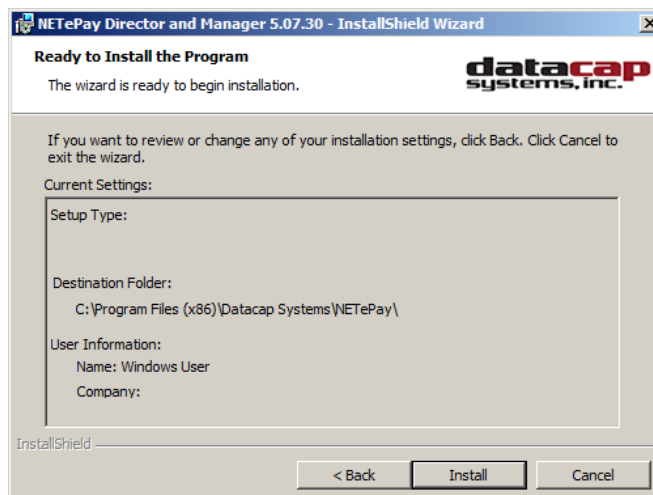
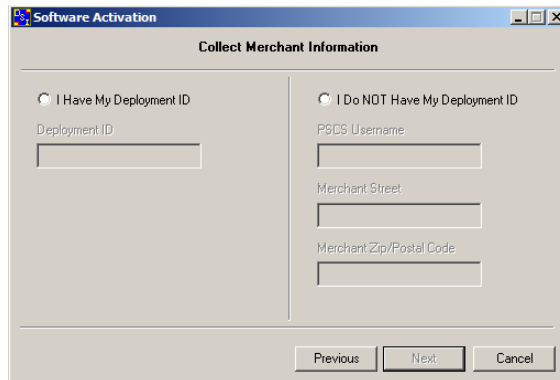5. When the installation process is completed, click **FINISH**.

6. The Director application runs automatically and starts its configuration with the acquisition of a new serial number that will be used for any subsequent ePay software installations. Click **Obtain Serial Number** to have a new serial number issued from Datacap's Payment System Configuration Server (PSCS) over the Internet.
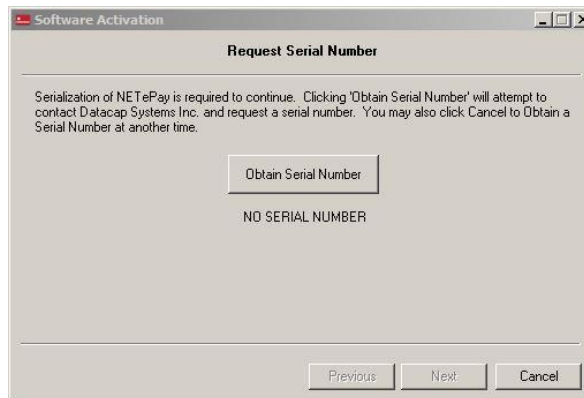
7. If a serial number is acquired successfully from PSCS, it will be displayed under the now inactivated Obtain Serial Number button. Make a record of the serial number assigned for your records. Click **NEXT** to continue.
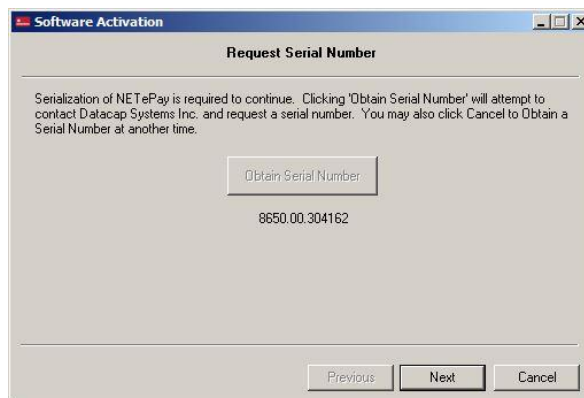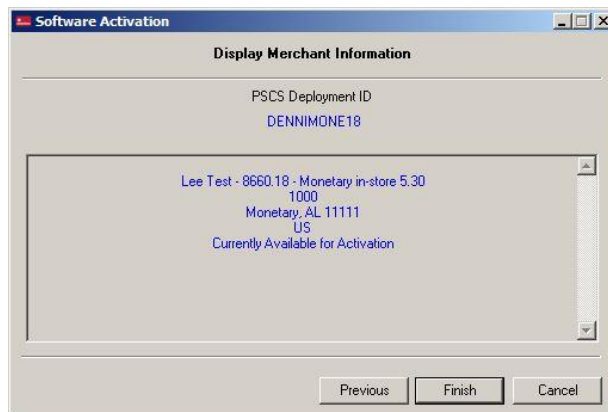
8. The Director will display the following screen to activate the installation by associating it with a merchant profile. To continue, you must verify that you or someone else has created a Merchant Deployment on Datacap's PSCS server. If a deployment was created you may have been given a Deployment ID, which is typically an eight-character code that has been assigned to the merchant's parameters. If you have a Deployment ID for the merchant, check the radio button **I Have My Deployment ID** and enter the ID in the text box below and click NEXT to continue.

If the merchant's parameters were created on PSCS but you do not have the Deployment ID, check the radio button **I Do NOT Have My Deployment ID** and enter your PSCS Username and the merchant's street and zip code. Click **NEXT** to continue.

9. If the Director is successful finding the relevant merchant information, the following confirmation screen will be displayed. Verify that the information is correct and click **FINISH** to complete the installation.

10. If PSCS successfully associates the merchant's information (parameters), then the serial number is fully activated for that merchant. The Director will then present a dialog confirming the merchant activation and Director installation is complete. Click **OK** to dismiss the dialog.

11. If the Deployment ID has not been activated at PSCS, the following dialog will appear:
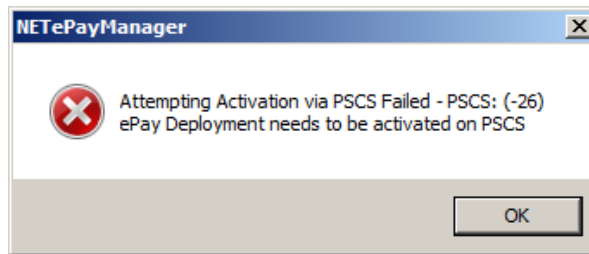
Dismiss the dialog be clicking OK. Activate the desired deployment ID (contact Datacap Support if you are not a PSCS user) and then see the section on Software Activation in Chapter 3.

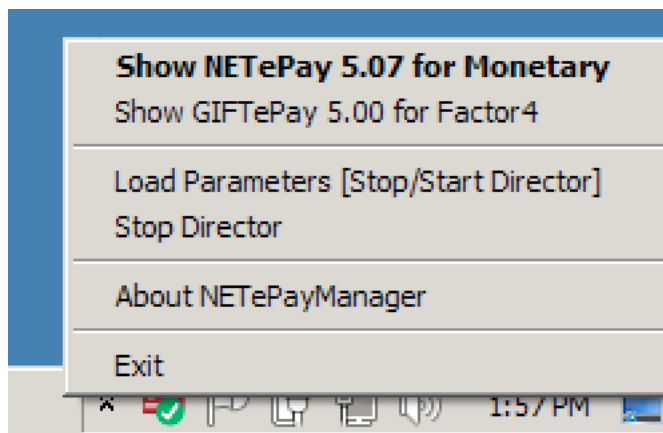# NETePay MANAGER OPERATIONS

Introduction

This chapter explains how to utilize the management function of the Manager application that is bundled with NETePay 5 Director. The Manager provides an interface to perform a number of management functions to get information about and control the ePay servers.

Manager Menu Options

1. The Manager application installs in the Windows tray area with a Datacap icon. The green checkmark in the Datacap tray icon indicates that the Director is running.


2. Right clicking on the Manager icon brings up a menu that is typical with activated ePay servers after the Windows PC with Director is started.


- *Show ePay Server Status Functions*
- *Load ePay Server Parameters (Stop/Start Director)*
- *Stop Director (Manager)*
- *About NETePay Manager*
- *Exit NETePay Manager*

Software Activation

1. If no ePay servers have been activated or if previously installed ePay servers have been deactivated, the Manager menu will appear as follows:
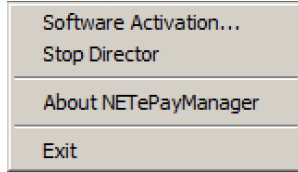

2. If *Software Activation* is selected from the above menu, the following will appear as in step 6 through 9 for the initial installation of the Director to obtain and activate a serial number. When the Software Activation is completed, the following dialog will appear to confirm the reactivation. Click **OK** to dismiss the dialog.
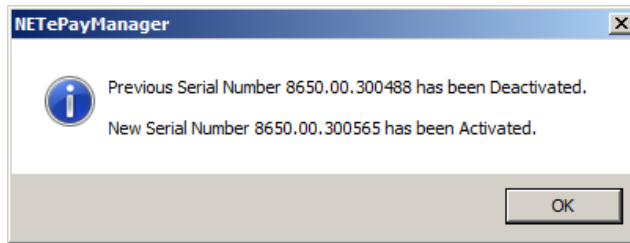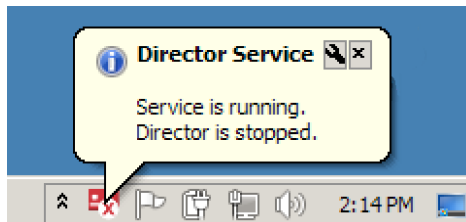

Stop/Start Director (Manager)

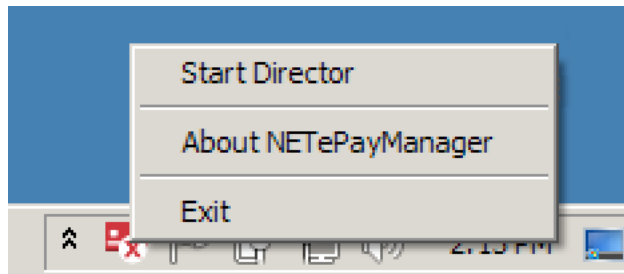1. When the Manager is running, you may stop it by selecting *Stop Director* from the tray menu.
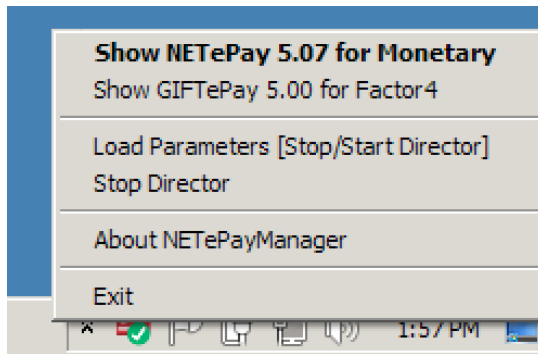
2. When Stop Director is selected, a notification is displayed as follows:
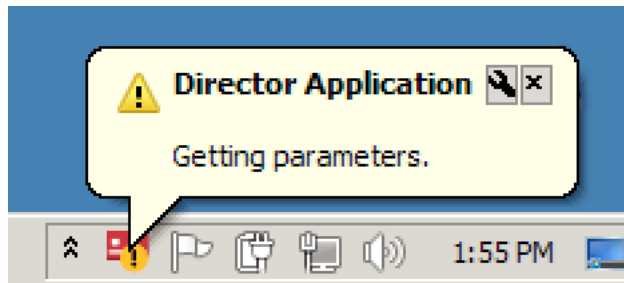

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and the Datacap tray icon shows a red X indication that the Director is stopped.

3. To restart the Director, select **Start Director** from the tray menu.

When the Director is restarted, a notification similar to the following will display while the Director is acquiring parameters from the PSCS system:


Show ePay Server Status Functions

1. To view the status/Activity/logs for an ePay server, select the name of the ePay server desired from the Director tray menu.
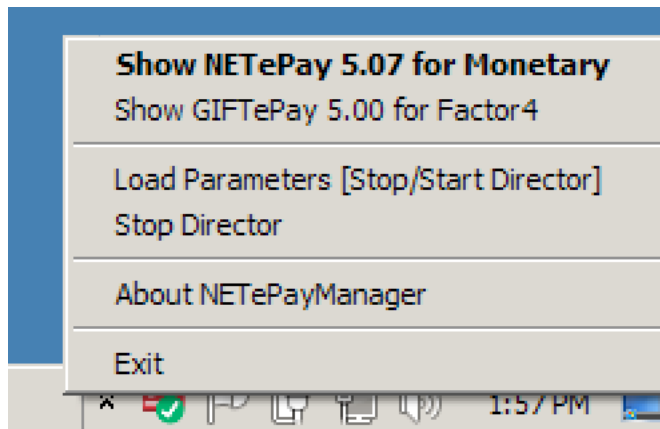
In the above menu example, **Show NETePay 5.07 for Monetary** is an actively running ePay server. The diminished listing for **Show GIFTePay 5.00 for Factor4** indicates that the GIFTePay server is installed on the computer but hasn't yet received merchant parameters from PSCS. Even though an ePay server is installed and activated, it will not be able to process transactions until it has received valid merchant parameters from PSCS.

2. To view the status and access additional functions for an ePay server, select the name of the ePay server desired from the Director tray menu. In this example **Show NETePay 5.07 for Monetary** was selected. The display shows the current processing activity for the selected ePay server.

In addition, the ePay PSCS parameterization options, server logs and support functions can be accessed by selecting an icon in the upper right of the application window.
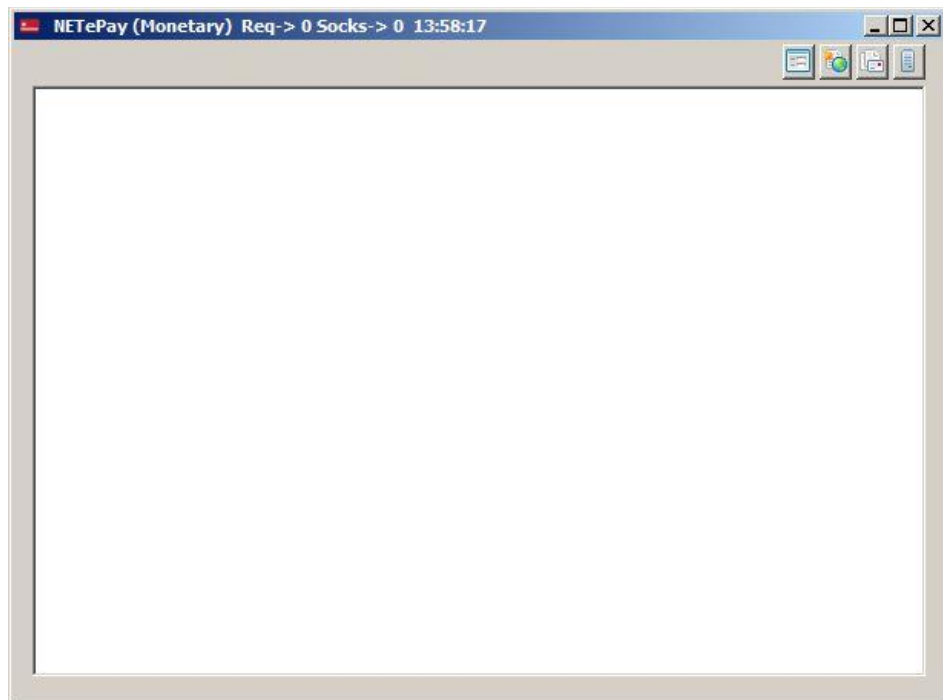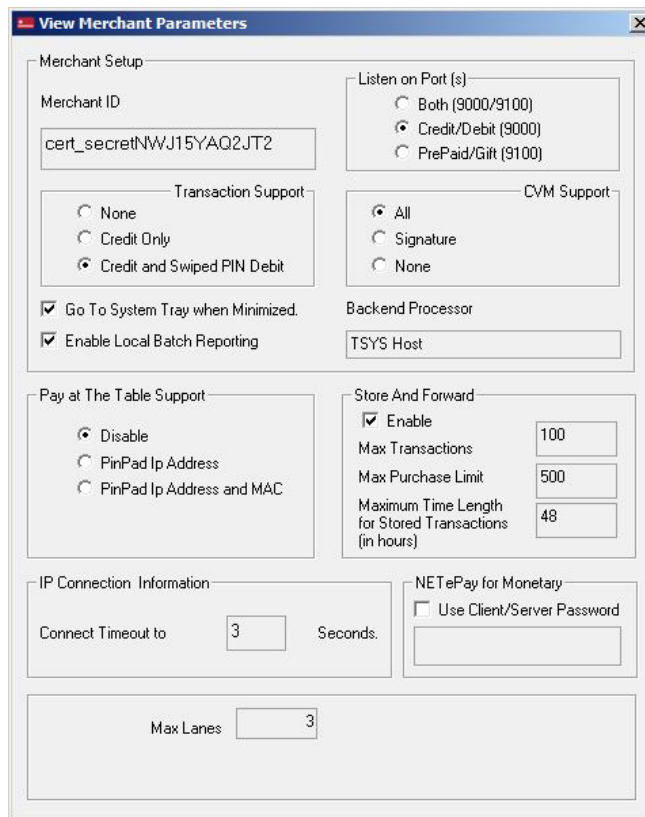

Four functions icon buttons are placed in the upper right corner of the ePay status window, as follows:

- The first button (on the left) presents a view of the current ePay parameters.

- The second button opens a default browser window to change ePay server parameters or access PSCS

- The third button allows selection of an ePay log file to be automatically emailed to Datacap support.

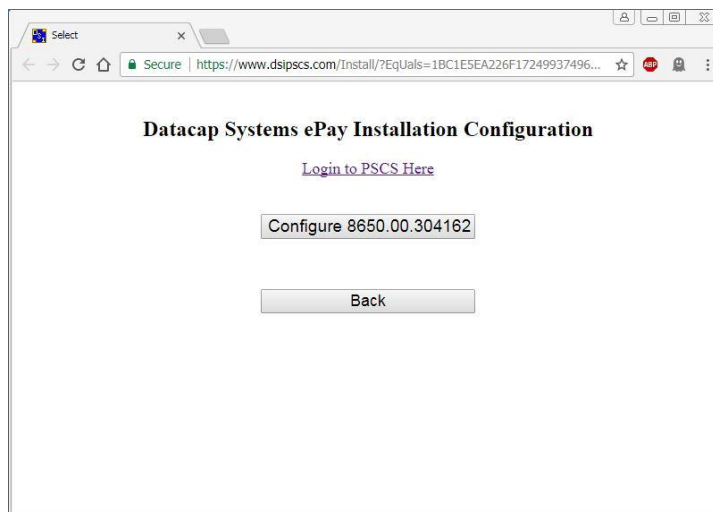- The last button (on the right) allows a selected ePay log file to be displayed locally.

3. If the *View Parameters* icon is selected (first icon on left), a window will open displaying the currently used parameters for the ePay server, as follows:

4. If the *Configure* icon is selected (second from left), a window will open in the default browser allowing the parameters for the installed and activated ePay server to be modified or link to Datacap's PSCS (Payment System Configuration Server) to modify the ePay deployment. Note that PSCS requires a username/password to login):

Click the Configure button with the relevant serial number and a screen will be presented that allows the ePay parameters to be changed as follows:

Click the Login to PSCS button and the main login screen for PSCS will be presented as follows:

5. If the *Email Log* icon ![icon] is selected (third icon from left), the following file chooser dialog opens to pick the ePay log file to be emailed to Datacap support, as follows:
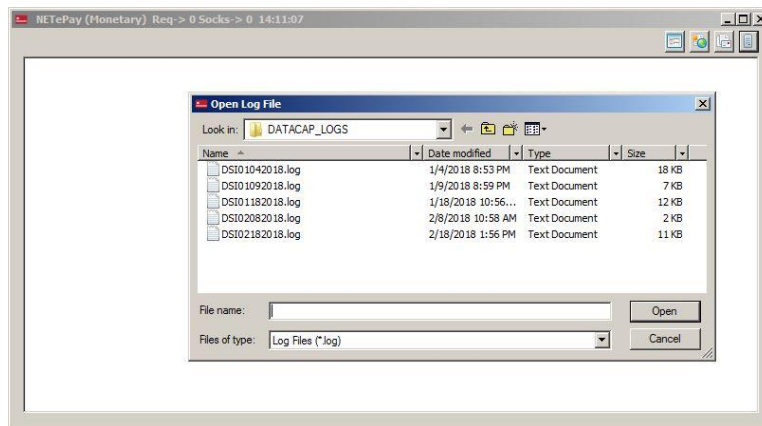
After selecting the desired log to email, your default IMAP email client will open with a message to 'support@dcap.com' and the selected log file automatically attached. You may enter any additional information desired in the body of the message.
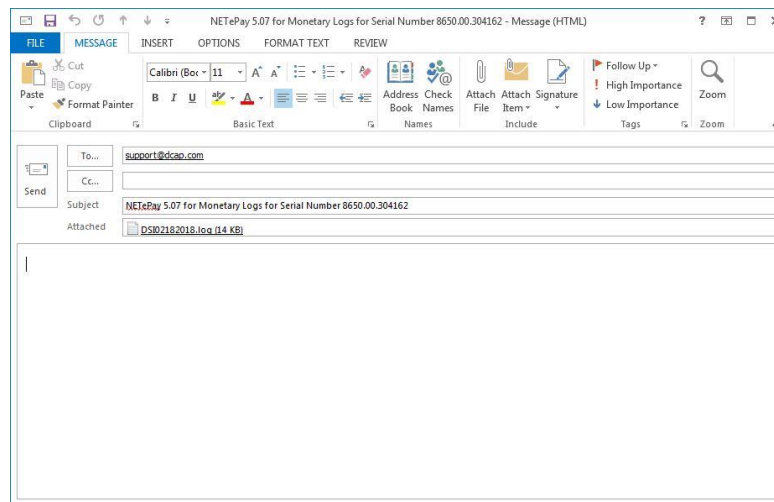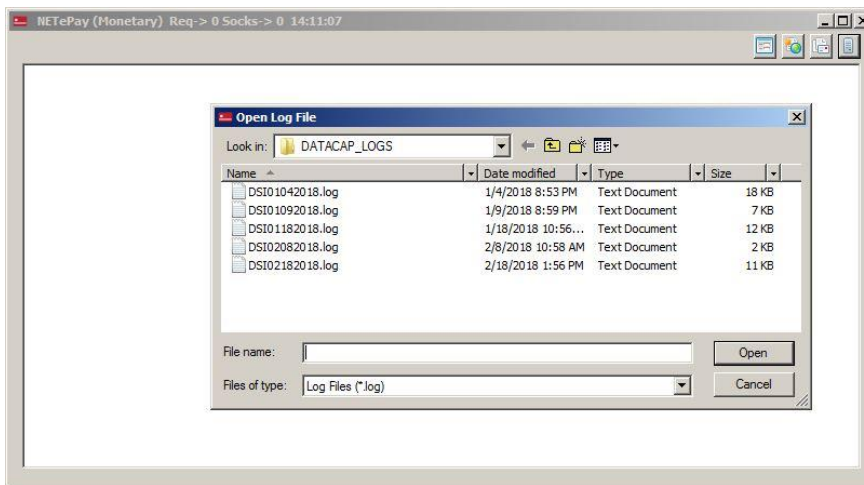

If you haven't established a Microsoft Outlook profile in Windows, you will see the following dialog when the *Email Log* button is selected:

Create a profile as indicated for your version of Windows. You may create a profile without establishing an Outlook account; in that case a browser based email client will be used.

6. If the *View Log* icon is selected (fourth from left), the following file chooser dialog opens to pick the daily ePay log of interest, as follows:

The selected log file will be opened in Windows Notepad. A sample log file:

Load Parameters (Start/Stop Director)

1. If ePay parameters have been updated on Datacap's PSCS system, the Director/Manager system automatically retrieves the latest parameters to the ePay servers when the PC is booted/restarted. If parameter changes are made in PSCS while the Director/Manager are already running, the Load Parameters (Start/Stop Director) will stop the Director momentarily and then restart it which will force the retrial of the latest ePay parameters from the PSCS system.

    When the Load Parameters (Start/Stop Director) item is selected, you will see tray messages like the following indicating that the parameter update is occurring:
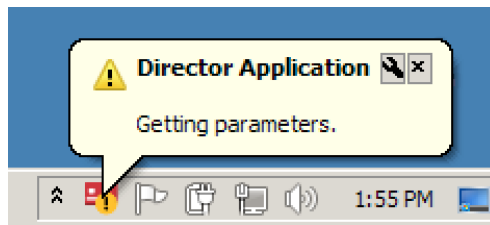
Show Manager (Director) About Box

1. To view information about the Manager (Director) including version, serial number and licensing information, select **About** from the Manager tray menu.

Exit / Restart Manager

1. The Manager application may be stopped by selecting **Exit** from the Manager Tray menu. The Datacap Manager icon will be removed from the Windows tray menu.

2. To restart the Manager application, select Software From Datacap from the Windows start menu and select the NETePay Manager application.
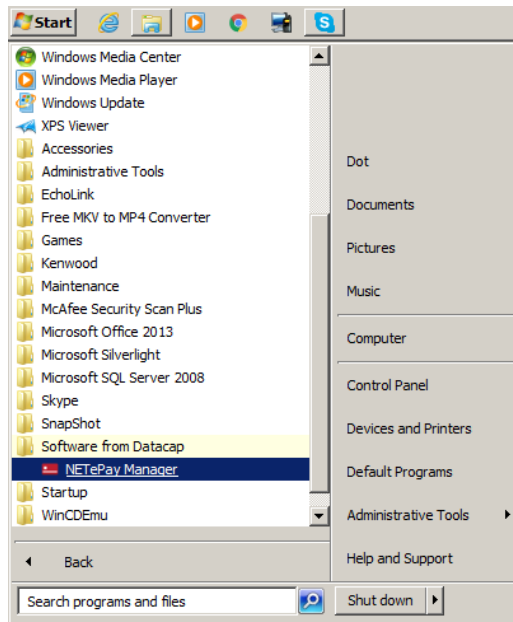
When the Manager application starts, it will briefly present a notification of how many ePay servers are running, as follows:
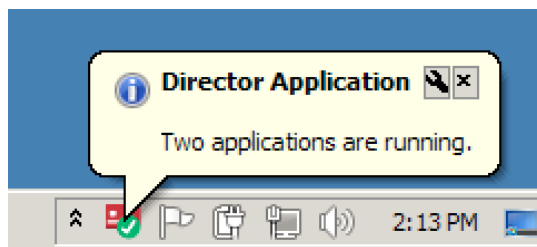
DIRECTOR SERVICE CONFIGURATION FOR PCI CONFORMANCE

Introduction

The NETePay 5 Director service installs by default under a local system account. To maximize compliance with PCI guidance, you should not use the SystemService default principal – it is anonymous and has the privileges of an Administrative account. This section will provide instructions on how to configure the NETePay 5 Director service appropriately.

NETePay 5 Director Service Windows Description

Name: Datacap Director Service

Description: Runs Datacap Director as a service. Is configured to start Datacap Director automatically.

Configuring the NETePay 5 Director Service

The Services panel within Windows Administrative Tools is used to configure selected properties of NETePay 5 Director Service as follows:

Click the Windows **Start** button; right-click the **Computer** shortcut and select **Manage** from the resulting context menu.

Double-click to expand the **Services and Applications** option from the left pane, and then select **Services** from the options tree.

Scroll to locate NETePay 5 Director Service and double-click to launch its Properties menu, where you can select the **Log On** tab in the Properties dialog, which will display as follows:
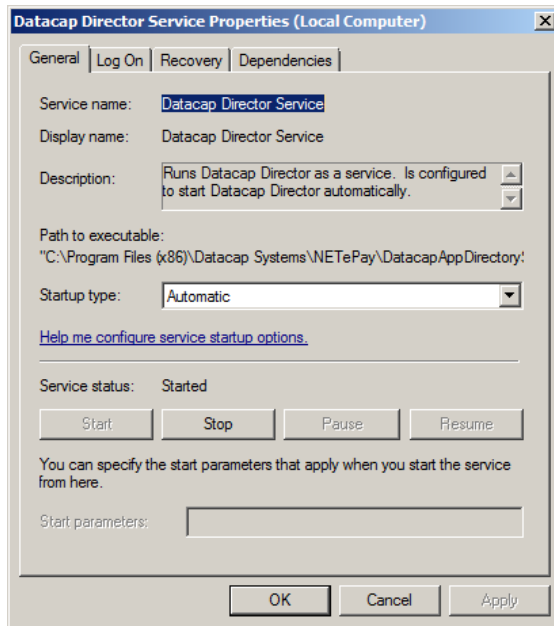
Click the **Use Account** radio button and the dialog will update as follows:
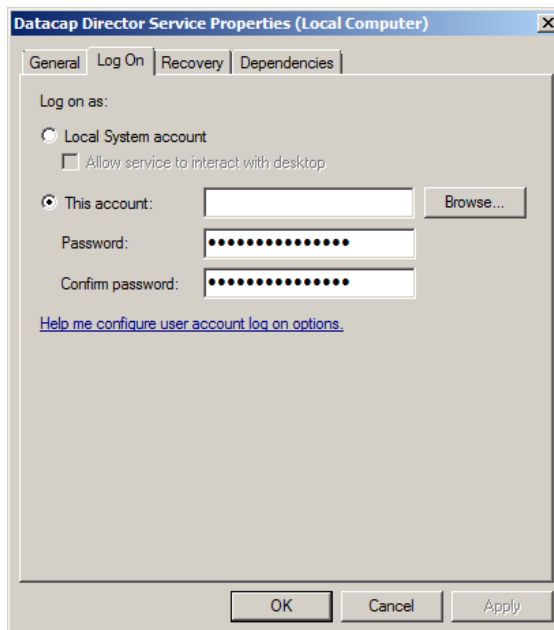
Important Note:

Prior to the next step, you should create an account from the User group specifically to launch the NETePay 5 Director service via Windows Management Console.

This User account will be reported in the NETePay 5 Director service log files. For PCI PA-DSS/SSF compliance, you should not use the SystemService default principal – it is anonymous and has the privileges of an Administrative account.

The account properties should have 'Password never expires' selected to allow the service to start without interruption.

Click the **Browse** button and the Select User dialog opens as follows:
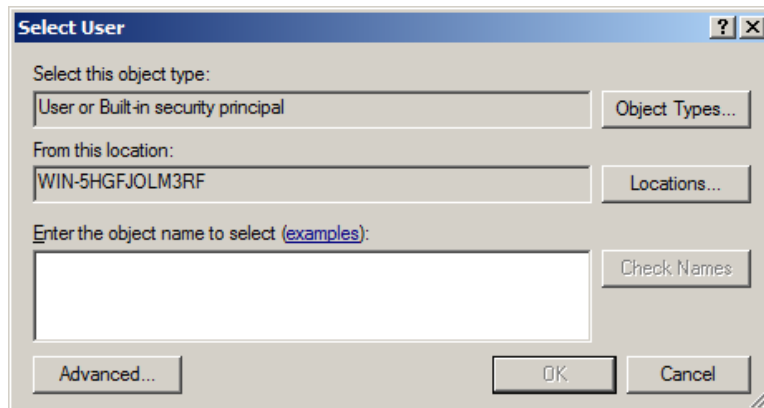
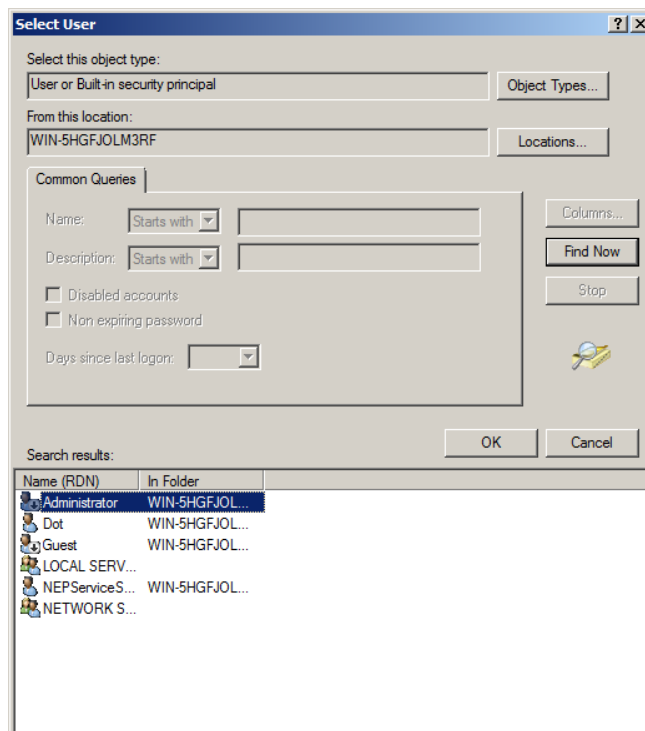Next, Click the **Advanced** button, and the dialog will expand; then click the **Find Now** button to see as list of Users and Service Accounts as follows:

Double click on a User account created to use to start the NETePay 5 Director service then click **OK** to accept the account. The dialog for the service properties will display again with the account name. Enter (replace) the password with those of the selected account.

The NETePay 5 Director service is now configured.
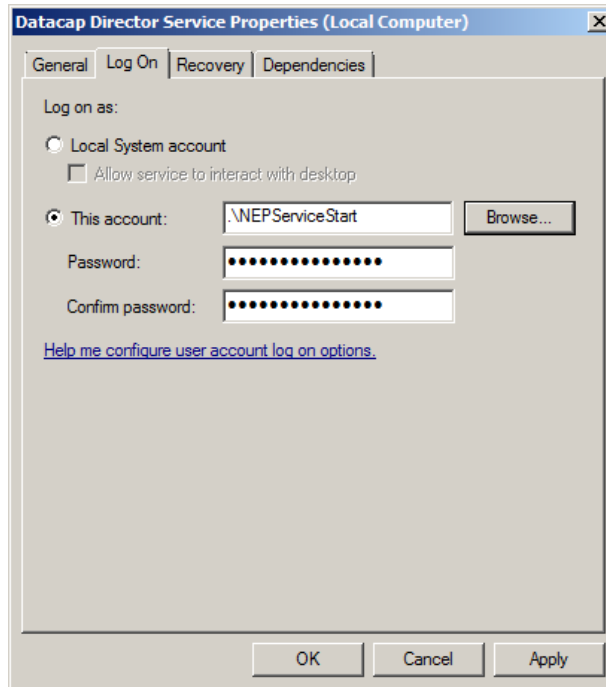
Click **Apply** then **OK** to complete the NETePay 5 Director service setup.

Director Service Logging

The *NETePay 5 Director* service records logs of all its activity. The logs do not record any sensitive cardholder information. The Director log files are in the following location on the install volume:

> /Program Files/Datacap Systems/NETePay/Director/DATACAP_LOGS

NETePay 5 Director log files are recorded by date in individual ASCII files named as follows:

> SERVICE_DSIMMDDYYYY.log

Where MM = Month, DD = Day and YYYY = Year.

The *NETePay 5 Manager* application also records its own log in addition to the Director service logs. This log records when the Manager application attempts to start/stop ePay server execution. The Manager log files are in the following location on the install volume:

> /Program Files/Datacap Systems/NETePay/Director/DATACAP_LOGS

NETePay 5 Manager log files are recorded by date in individual ASCII files named as follows:

> DSIMMDDYYYY.log

Where MM = Month, DD = Day and YYYY = Year.