

IBM Payment Manager Cassette Development Workshop

IBM Payment Manager 2.1 Installation & Demo



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Agenda

- Installation Requirements
- Installing PM 2.1 on Windows NT
- Defining users
- Creating a merchant and authorizing a payment cassette
- Assigning user roles
- Creating an account and a brand
- Testing the merchant installation setup

PM 2.1 for Windows NT Installation Requirements

- Hardware
 - ▶ P166 or better
 - ▶ Network adapter which supports TCP/IP
 - ▶ CD-ROM drive
 - ▶ 200 MB disk space -- includes room for DB growth
 - ▶ 5 MB additional disk space in c:\temp
 - ▶ 128 MB RAM minimum; 256 MB recommended
- Software
 - ▶ MS Windows NT 4.0 Workstation or Server with SP 3 or later
 - ▶ JDK 1.1.x for Windows NT, $x \geq 7$; 1.2 not yet supported
 - ▶ Web Browser

See the Administrator's and User's Guide, Chapter 2, for more details and the requirements of other system environments.

Software Included with PM 2.1

- IBM Universal Database (UDB) 5.2
- WebSphere Application Server 2.0.3.1
- IBM HTTP Server 1.3.6.1
- Java Runtime Environment

Other Supported Software

- Other supported databases include:
 - ▶ Oracle
 - ▶ Microsoft SQL Server
- Other supported Web Servers include:
 - ▶ Lotus Domino GO Webserver
 - ▶ Domino
 - ▶ Netscape Enterprise Server
 - ▶ Netscape FastTrack Server
 - ▶ Microsoft IIS
 - ▶ Apache Server

PM 2.1 Installation

- Logon with Administrator authority (if using UDB, id length ≤ 8)
- Install the Java Development Kit
 - ▶ We recommend 1.1.8
 - ▶ 1.2 and above are not supported for cassette development
 - ▶ Download from <http://java.sun.com> or, if IBMer, <http://w3.hursley.ibm.com/java>
- Set **JAVA_HOME** system environment variable to point to JDK
- Install the Payment Manager
 - ▶ Includes HTTP Server, DB2, Websphere Application Server
- Register the software
 - ▶ If you don't know the registration number, enter **5**
- Reboot and verify that all the services were started
 - ▶ DB2 - DB2
 - ▶ DB2 - DB2DAS00
 - ▶ IBM HTTP Administration
 - ▶ IBM HTTP Server

Define Users and Start the PM User Interface

- Start the Websphere Application Server GUI
 - ▶ browse ***http://<<hostname>>:9527***
 - <<hostname>> is the machine where WAS is running.
 - ▶ logon as ***admin/admin*** (userid and password are the same)
- Create users for your merchant using Websphere
 - ▶ ***clerk*** Cashier in the merchant's store
 - ▶ ***super*** Supervisor in the merchant's store
 - ▶ ***madmin*** Administrator for the merchant's store
 - ▶ ***pmadmin*** Administrator for the Payment Manager system
- Start the Payment Manager Engine
 - ▶ Use the ***Start*** menu or desktop shortcut
- Start the PM GUI --
 - ▶ browse ***http://<<hostname>>/PaymentManager/***
- Logon as a Payment Manager Administrator (***admin/admin***)

Create a Merchant and Authorize a Payment Cassette

- click ***Merchant Settings***
 - ▶ click ***Add a Merchant***
 - Enter:
 - Merchant Name ==> ***Test Store***
 - Merchant Number ==> ***123456789***
 - Authorized Cassettes ==> check ***Test Cassette***

Assign User Roles

- Assign a merchant administrator
 - ▶ click **Users** from the main navigation panel
 - click **madmin** from the list of users
 - select **Test Store** in the drop-down list of merchants
 - select **Merchant Administrator** as the user role
- Repeat these steps for **pmadmin**, **clerk** and **super** users
 - ▶ Select the appropriate role for each user
 - ▶ for **pmadmin**, select a blank merchant from the drop-down list
 - The PM administrator has authority for all merchants
- click **Update** to save the user configuration
- click **Logoff admin** to return to the main PM logon window.

Create an Account

- Logon as a merchant administrator
 - ▶ madmin/madmin
- click **Merchant Cassette Settings**
 - ▶ click the **Test Cassette** icon
 - click **Accounts**
 - click **Add an Account**
- Enter this information for the new account:
 - ▶ Account name ==> **Test Account**
 - ▶ Account number ==> **111111111** (nine ones)
 - ▶ Financial Institution Name ==> **Test Bank**
 - ▶ Payment Gateway ==> **1243**
 - ▶ Customer ID ==> **123**
- click **Create Account** to create an account for the Test Cassette

Create a Brand

- Logon as a merchant administrator
 - ▶ ***madmin/madmin***
- click ***Merchant Cassette Settings***
 - ▶ click the ***Test Cassette*** icon
 - click ***Accounts***
 - click ***Test Account***
 - ◆ click ***Brands***
 - ◆ click ***Add a brand***
- Enter this information for the new brand:
 - ▶ Brand name ==> ***TestBrand***
 - ▶ Certificate Authority ==> ***54467***
- click ***Create Brand***
- click ***Logoff madmin*** to logoff of the merchant administrator ID

Test the Merchant Setup

- Create test payments using the sample buy page
 - ▶ browse ***http://<<hostname>>/SampleBuyPage***
 - ▶ enter this information
 - Card Number ==> ***77889*** (the TestBrand credit card number)
 - Expiry Date ==> Highlight any month and year
 - ▶ click ***Buy***
 - ▶ repeat these steps two more times to create three orders
- Approve orders
- Deposit payments
- Settle batches
- Issue credits
- View daily batch totals

See the sample exercise, ***Managing payment processing***, in Chapter 7 of the Administrator's and User's Guide for more details.