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RES 3000
Version 3.0
CA/PMS Installation and Setup Instructions

About This Document

This document provides installation and setup instructions for the CA/PMS credit card driver. The type of CA/EDC Driver software that your System requires is dependent on the Credit Card Processor used for the authorization and settlement process. The PMS CA/EDC Driver provides you with the ability to use the credit authorization and settlement services provided by the MasterCard Automated Point-of-Sale Processor. PMS provides authorization support for all of the major credit cards.

General Information

Who Should Be Reading This Document

This document is intended for the following audiences:

◆ MICROS Installers/Programmers

◆ MICROS Dealers

◆ MICROS Customer Service

◆ MICROS Training Personnel

◆ MIS Personnel

What the Reader Should Already Know

This document assumes that you have the following knowledge or expertise:

◆ Operational understanding of PCs

◆ Understanding of basic network concepts

◆ Experience with Windows 95/NT 4.0

◆ Basic knowledge of relational database concepts

◆ Understanding of POS terminology and concepts

◆ Exposure to MICROS 2800/3700 POS system and Restaurant Enterprise Series products

Your Guide to Getting Information on Software Installation

To find information on installing this software, including site requirements and installation tips, refer to *Restaurant Enterprise Series RES Setup Instructions, Version 3.00, P/N MD0009-063*. You can access this document directly from the CD by opening the RMF300RESSETUP.PDF file. You can also access this file through the Windows® *Start* menu by selecting *MICROS Applications | Online Documentation | ReadMe First | RES Setup*.

MICROS Desktop

The MICROS Desktop works with all MICROS Restaurant Enterprise Series products, providing a customizable Windows user interface that gives you easy, instant access to the MICROS programs and tasks that you rely on to keep your business running smoothly. More importantly, you can define security privileges for your employees, giving you complete control over who has access to the system.

The MICROS RES Setup program streamlines the installation of the MICROS Desktop application. It is installed automatically when the Enterprise Office 3700 Server option is selected during RES Setup. Select the option you wish to install and the setup program will take care of the rest. The MICROS Desktop is not installed on Workstations.

To find information on installing this software, including site requirements and installation tips, refer to *Restaurant Enterprise Series MICROS Desktop, Version 3.00—ReadMe First, P/N MD0003-014*. You can access this document directly from the CD by opening the RMF300DESKTOP.PDF file. You can also access this file through the Windows® Start menu by selecting *MICROS Applications | Online Documentation | ReadMe First | Desktop*.

Microsoft Windows NT® Service Packs

Microsoft Windows NT Service Pack 4 or greater must be installed prior to running RES Setup. The application of the service pack addresses known Year 2000 (Y2K) issues, making both the RES Server and PCWSs fully compliant for both Y2K and for euro currency. For more information, see *Restaurant Enterprise Series, Microsoft Windows NT ® Service Pack Installation*, P/N MD0009-056.

Your Guide to Getting Information on This Version of the Software

You will find extensive help resources available for this software, including:

◆ the existing online Help system/*The Doc Café ™*, RES Edition

◆ the online manuals

Each of these is described in the sections that follow.

Existing Online Help/The Doc Café ™, RES Edition

The existing online Help system and *The Doc Café ™*, RES Edition work in tandem to provide the complete procedural information for each task in the system. In addition, *The Doc Café ™*, RES Edition currently provides the complete RES documentation set, including task-based help, for many RES products. And, in future releases, *The Doc Café ™*, RES Edition will provide the complete RES documentation set for all RES products. This complete "doc set" contains the following types of information/documentation:

◆ ReadMe First

◆ Feature Reference

◆ Procedures/Task-Based Help

◆ Reports

◆ Screen Navigation System

◆ Traditional Paper-Based Manuals

Eventually, with future releases of RES, the current online Help system will be entirely replaced with the robust, one-stop-shop for your documentation needs—*The Doc Café ™*, RES Edition. Currently, you must read sections in both the existing online Help system and *The Doc Café ™*, RES Edition to learn about RES products. This is because, at this point in time, *The Doc Café ™*, RES Edition has only partially replaced the existing online Help system. Your patience is appreciated as the entire vision for *The Doc Café ™*, RES Edition is implemented.

Task-Based Help

The **Help** button ( ) provides assistance while you work. It provides access to the existing online Help system. But remember, task-based help content is being moved into *The Doc Café ™*, RES Edition. When the **Help** button is selected, there are three possible content scenarios that can apply:

◆ **Content Scenario 1**: The first and only topic in the table of contents contains a commercial for *The Doc Café ™*, RES Edition. No other topics appear. If this is the case, close the existing online Help system and open the corresponding HTML Help or PDF file in *The Doc Café™*, RES Edition. Task-based help for the features of this product now only resides in HTML Help files of *The Doc Café ™*, RES Edition.

◆ **Content Scenario 2**: The first topic in the table of contents contains a commercial for *The Doc Café ™*, RES Edition, yet several other topics also appear. If this is the case, task-based help for this product now resides in two places: the existing online Help system and *The Doc Café ™*, RES Edition. Task-based help for features that have been added or changed since the release of RES Version 2.6 are now documented in *The Doc Café ™*, RES Edition. Task-based help for all other features of this product continue to be documented in the existing online Help system.

◆ **Content Scenario 3**: The first topic in the table of contents does not contain a commercial for *The Doc Café ™*, RES Edition. Task-based help for all features of this product continue to be documented in the existing online Help system.

When the **Help** button is selected and task-based help topics for the current-running product exists in the online Help system, a help menu is displayed that includes several tabs. The tab options on this menu include *Contents*, *Index*, and *Find*.

When a HTML Help file is opened from *The Doc Café ™*, RES Edition, a help menu is displayed that includes several tabs. The tab options on this menu include *Contents*, *Index*, and *Search* (in place of *Find*).

Contents Tab

The *Contents* tab acts like a table of contents, displaying the *Help Main Menu* from which you may select a topic. Double-click a topic book to view the contents. Select a topic from the list to locate the information you want.

Index Tab

The *Index* tab displays a list of keywords from which you can make a selection.

Find or Search Tab

The *Find* or *Search* tab allows you to search for a specific word or phrase. You can type the word or phrase you want to find, select matching words to narrow your search, or select a topic.
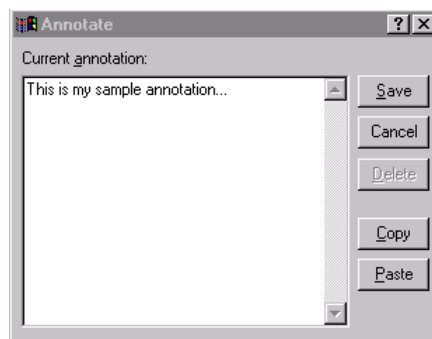
Context-sensitive Help

The **Context-sensitive Help** button (▇) is used to display specific help for each individual field and button in the system. By selecting this button, then selecting a field or button on the current window, help will be displayed specific to the item selected. This help will tell you what function the button performs, or what type of entry is required for the field.

Context-sensitive Help will not be changed in any way by the introduction of *The Doc Café* ™, RES Edition.

Annotating Help Files

To supplement the standard help text, Windows allows you to append notes or annotations to topics in the system. With this feature, you can clarify concepts, provide samples and cross-references, and add information specific to your business.

To annotate a file within the existing online Help system, the main Help button (▇) is used to access the system. When the Option button is clicked and Annotate is selected from the drop-down list, a basic text editor is displayed. This editor is used to enter your notes and images. Once the file is saved, the editor is closed and you are returned to the original help topic.

To mark the change, a paperclip icon (▇) is added before the topic title. The icon is a visual cue that an annotation exists. To view it, you simply click the icon to reopen the file in the Annotation text editor.

Annotations can be added, modified, or deleted at your discretion. However, you should be aware that these files, though appended to help topics, are not part of the original help system. If the application is reinstalled or upgraded, these annotations will be overwritten.

Currently, you cannot annotate HTML Help files in *The Doc Café ™*, RES Edition.

Online Manuals

The system comes with a complete set of online manuals. You can access the manuals through the *MICROS Applications | Online Documentation | Manuals* option on the Windows® **Start** menu. The manuals are PDF (Portable Document Format) files that are viewed through the Adobe Acrobat® Reader utility, which is included in the installation. This utility contains functions that allow you to view, navigate, print, and browse the manuals.

Eventually, with future releases of RES, only the following types of PDF documents will be provided through the *MICROS Applications | Online Documentation | Manuals* option on the Windows® **Start** menu:

◆ ReadMe First

◆ Installation and Setup MDs

In the future, all other PDF documents will *only* be provided through *The Doc Café ™*, RES Edition.

With respect to online manuals, *The Doc Café ™*, RES Edition currently provides the complete documentation set for RES products. This complete "doc set" includes the following types of information/ documentation:

◆ ReadMe First

◆ Feature Reference

◆ Procedures/Task-Based Help

◆ Reports

◆ Screen Navigation System

◆ Traditional Paper-Based Manuals

Installation and Setup

Preparation

Prior to installation of the CA/PMS credit card interface, the items described below should be completed.

Credit Card Batch Settlement

Before installing the CA/PMS credit card driver all batches for credit cards should be created and settled.

RES Shutdown

Start the MICROS Control Panel and shutdown 3700 RES to *Database* level. It is important that the Credit Card Server (CCS), POS Operations, and Credit Card Batch are not running.

Installation Procedures

To install the CA/PMS interface, download the **pmszip.exe** file from the MICROS web site. Once downloaded, double-click the file. This is a self-extracting file that will install the necessary files in the proper locations.

Setup Procedures

To set up the CA/PMS interface, perform the procedures in the following sections.

CA/EDC Driver Setup

To set up the CA/PMS driver, perform the following steps:

1. Start POS Configurator.

2. Select Devices | CA/EDC Drivers.

3. Click the + icon to create a new table entry in the database.

4. The Number field will default to the next available record number. In the Name field, enter PMS.

5. Click the Driver tab. In the Driver Code field, enter PMS.

6. Click the System tab. Complete the fields on this form as follows:

    ◆ **Show host messages**—Enter one of the following values:

        ◆ 0—The interface will only send self-generated messages to OPS.

        ◆ 1—This interface will look for a message from the hosting PMS system. If a host message has been received, it sends the host message to OPS; otherwise, it selects a self-generated message.

    ◆ **# of digits after dec. pt.**—After a completed settlement, the interface reports the total amount of the settled records in the output box of the Credit Card Batch application. This field is used to format the number of digits after the decimal point for this amount in relation to the country-specific currency. Values from 0 to 5 are allowed.

    ◆ **Long UWS #**—This field is used for configuring CA/PMS to work with PCWS numbers with 9 or 2 digits. Enter one of the following values:

        ◆ 0—Use 2 digit format.

        ◆ 1—Use 9 digit format.

    ◆ **Register ID**—The CA/PMS interface needs to register itself with the Interface Server (IFS) for communicating with the PMS host system. This registration process has to be done with a unique Register ID, such that IFS is able to recognize the interface. If the default value 0 is used then the Registration ID will be *. If a value other than 0 is used, you must make certain that the number does not conflict with the Register ID of another interface, such as PMS Room Charge Posting.

◆ If you choose to change this value from 0 to any value between 1 and 99, the value must not be used in any other OPS using this Register ID for Room Change Postings in order to prevent conflicts.

◆ **DITB**—This field is used by Dollars In The Bank and should not be activated for any other credit company. Enter one of the following values:

  ◆ 0—Send credit authorization requests in standard format.

  ◆ 1—Send credit authorization messages with additional fields, containing the guest check number and payment date and time.

◆ **Interface Name**—This is the name by which the CA/PMS interface registers itself with IFS. It is case-sensitive and must be exactly the same as the interface name in the Interface Name field on the IFS property window. The name cannot exceed 16 characters.

7. Click the Authorization tab. In the Merchant ID field enter the name of the restaurant or a unique ID which lets the credit card processor identify the POS that is requesting the transaction. Do not use any special or language-specific characters here.

8. Click the Settlement tab. Complete the fields on this form as follows:

    ♦   **Omit and Continue**—At batch settlement time, if a record is creating problems, the user can decide whether to omit the record and continue batch settlement process or cancel the process. Enter one of the following values:

        ♦   0—The interface will cancel batch settlement if one record fails to settle.

        ♦   1—The interface will omit and mark the record that failed to be settled and continues with settling the next record.

    ♦   **UWS ID**—The UWS ID is sent by the CA/PMS via IFS to the PMS host. The UWS ID format depends on the value entered in the **Long UWS #** field on the System tab (see page 10). If the default value of 0 is left in this field, the interface will use 99 as the UWS ID. Any other value will overwrite the default.

    ♦   **Terminal Based Settlement**—This field defines when records are marked as settled. Enter one of the following values:

        ♦   0—Use host-based settlement. Every record will be marked as "settled" in the Credit Card Batch immediately after settlement.

        ♦   1—Use terminal-based settlement. All records will not be marked as "settled" before the Batch Close command has been successfully responded from the PMS system.

9. Click the Save icon.

Interfaces Setup

To set up the CA/PMS interface, perform the following steps:

1. On the POS Configurator window, click the Devices | Interfaces.

2. Click the + icon to create a new table entry in the database.

3. The Number field will default to the next available record number. In the Name field, enter PMS. Be aware that this field is case-sensitive, it must match the same entry made in step 4 of CA/EDC Driver Setup (see page 9).

4. Click the General tab. Complete the fields on this form as follows:

   ◆ **Outgoing Message Name**—Enter PMS in this field. This text will be sent with each message from the interface to the credit card processor.

   ◆ **Timeout**—Enter 20 in this field. This value tells the IFS how many seconds to wait for an answer from the Credit Card Processor.

   ◆ **Network Node**—Select the 3700 RES Server from the drop-down list. This is where the interface resides.

   ◆ **Number ID Digits**—Select 2 or 9 from the drop-down list. This value should be the same as the setting in the **Long UWS #** field on the Devices | CA/EDC Drivers | System tab (see page 10).

   ◆ **Backup Interface**—This field is not applicable to this driver and, therefore, should be left empty.

   ◆ **Interface Type**—Select TCP/IP.

   ◆ **Log Transactions**—If you want to log messages from/to the Credit Card Processor, select this option.

   ◆ **SIM Interface**—This field is not applicable to this driver and, therefore, should be left disabled.

5. Click the Interface tab. Complete the fields on this form as follows:

  ◆ **TCP Server Name**—Enter the IP Address of the server on which the CA/PMS host system is running. This can be the same PC on which the RES 3700 Server runs, as well as any other computer accessed by the TCP/IP network.

  ◆ **TCP Port Number**—Enter the port number (normally 5008) for communication with the CA/PMS host system.

6. Click the Save icon.