



ICVERIFY

Version 4.2

Installation Guide

This version of the document supersedes any and all previous versions of the ICVERIFY Implementation Guide.

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Purpose of This Guide

This guide describes how to install the ICVERIFY software.

Audience

This guide is intended for ICVERIFY product's administrators involved with installing, configuring and managing the ICVERIFY software and also for the End Users who will use this software.

Prerequisite Activities

Prior to installing and operating the User Manager and ICVERIFY for Windows application, you should complete the following tasks:

- Confirm that your computer system meets the minimum requirements and prerequisites, including the service pack levels and latest updates of your chosen operating system. Please refer to section 1.1.7 of the ICVERIFY PA-DSS Implementation Guide to know more about the PA-DSS regulations and guidelines on staying current with your software.
- When you install this software (or any software for that matter), you should have Administrator-level privileges to the PC on which you are installing it. If you don't have Administrator-level access, it may not be possible to install all the components needed to use the application, or they may appear to install properly and be unusable or unstable later
- The installation of ICVERIFY should always be done from CD-ROM.

Minimum System Requirements

- A Pentium/Athlon computer of 1 GHz or faster processor running Microsoft® Windows XP Home / Professional (service pack 3 or later), Windows 2003 Server (service pack 1 or later) , Windows Vista (32 bit and 64 bit) or Windows 7 (32 bit or 64 bit).
- Up to 512MB hard drive space for the full installation of Microsoft SQL Server 2005 Service Pack 4 Express Edition.
- 512 Megabytes of RAM.
- CD-ROM drive required for program installation.
- Microsoft .NET™ Framework Redistributable version 2.0 or later. If this is not currently installed on your computer, it will be installed as part of the ICVERIFY or User Manager Installation package.
- Microsoft Internet Explorer™ version 6.0 SP1 or later. Internet Explorer is most likely already installed on your computer. If you need to install it, you can download a free installation at <http://www.microsoft.com>.
- Microsoft Visual C++ 2005 SP1 Redistributable Package (x86) – for Windows 32 bit versions. This should already be installed if your computer has all the latest Windows updates. If you need to install it, you can download a free installation at <http://www.microsoft.com>. Alternatively, you can browse the ICVERIFY installation CD and find the required setup package under the folder - Microsoft Visual C++ 2005 SP1 Redistributable Package (x86).
- Microsoft Visual C++ 2005 SP1 Redistributable Package (x64) – for Windows 64 bit versions. This should already be installed if your computer has all the latest Windows updates. If you need to install it, you can download a free installation at <http://www.microsoft.com>. This version is not included in the ICVERIFY installation CD.
- Broadband Internet access recommended for Internet processor access; dial-up Internet accounts are not recommended. This version of ICVERIFY software supports transacting with the following networks via the Internet:

- First Data Corporation – North, South, Atlanta, Omaha and Nashville
 - Chase Paymentech – Tampa
 - Citi Credit Services
 - First Horizon Merchant Services
 - GE Retail Sales Finance
 - Global Payments – East
 - Heartland Payment Systems
 - Datamark Technologies / Stored Value Systems
 - Elavon
 - WorldPay
 - TSYS Acquiring Solutions
- Optional peripherals include:
 - Magnetic stripe or contactless card reader or EMV Chip Reader for card-present transaction processing
 - MICR reader for check processing
 - PIN-pad for debit/ATM card acceptance

If your processing network is not Internet-enabled, 100% Hayes-compatible modem for dial-up processor connections, able to step down to 300 or 1200 baud for connection stability.

Installing and Setting Up the ICVERIFY Application

The following screen will come up when you enter the ICVERIFY CD in the disk drive:



- **Install All Applications:** This option will install both ICVERIFY and User Manager in your computer. It will first install ICVERIFY and then User Manager.
- **Install ICVERIFY for Windows Only:** This option will install only ICVERIFY for Windows. This will install only the ICVERIFY for Windows application. Be aware that you will have to specify where the User Manager database resides, so your users can log in successfully from the substation PC.
- **Install ICVERIFY User Manager Only:** This option will install User Manager only.
- **Install Software Developer's Kit:** This option will install ICVERIFY for Windows SDK. This application is only applicable for ICVERIFY Integrators.
- **Install Adobe Reader:** This option will install Adobe Reader.
- **Browse On-Line Manuals:** This option will take you to the ICVERIFY product guides.
- **Explore the CD-ROM:** This option will show you all contents of the disk.

ICVERIFY does not recommend its users from installing and using the application on a computer that acts as Web Server or has a direct link to the Internet unless that link is secured. ICVERIFY recommends that the Internet hardware (cable modem, DSL router, etc.) that are used must have built-in firewall capabilities. For merchants who use any third party User Interface, it would be the responsibility of the merchants/integrators to make sure that they do not store such data on unsecured servers. Otherwise the merchants/vendors/integrators would not be PCI -DSS compliant. For more details, please refer ICVERIFY PA-DSS implementation guide.

ICVERIFY for Windows Installation

ICVERIFY is one of the most comprehensive payment processing products available for merchants of all types. It processes all major credit cards, as well as stored value and private label cards, and is capable of handling purchasing card Level II and Level III data for corporate cards. It also supports debit/ATM card processing and check verification / guarantee transactions

The ICVERIFY for Windows can be found on the following installation CD-ROMs:

- The main ICVERIFY for Windows Installation CD

Follow the steps mentioned below to install the ICVERIFY for Windows:

When you click on the option “Install ICVERIFY for Windows Only” in installation splash screen, you will see the screen shown in Figure 1:

Figure 1: ICVERIFY for Windows Welcome Screen



Step/Action

From the Welcome screen, click **Next**.

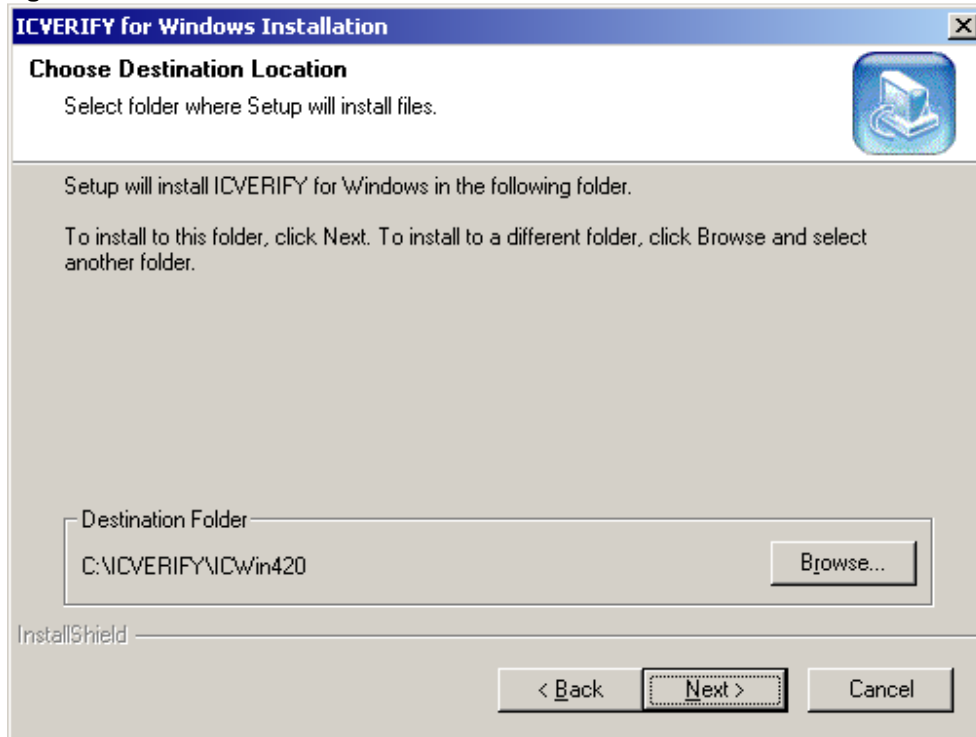
Figure 2: ICVERIFY for Windows License Agreement Screen



Step/Action

Read the End-User License Agreement displayed in the screen. If you agree to the terms of use, click **Next** to proceed with the installation; otherwise click **Cancel**.

Figure 3: ICVERIFY for Windows Installation Folder Location Screen



Step/Action

Next you'll be asked where you want to install the ICVERIFY for Windows application. The default folder is C:\ICVERIFY\ICWin420. Change this if you wish by clicking the **Browse** button and selecting a different installation folder. When you are ready to proceed, click **Next**.

The installation wizard will check the computer to see if Internet Explorer 6.0 SP1 or above is currently installed. If it is not present, then the installation will be aborted and you will need to run the Internet Explorer 6.0 SP1 or above setup from your Windows CD-ROM or you can download from Microsoft website and re-run the User Manager Installation process.

Then the installation wizard will check the computer to see if Microsoft .Net Framework 2.0 is currently installed. If it is not present, then the installer will start the .Net Framework installation process. When the installation is completed, click **Finish**.

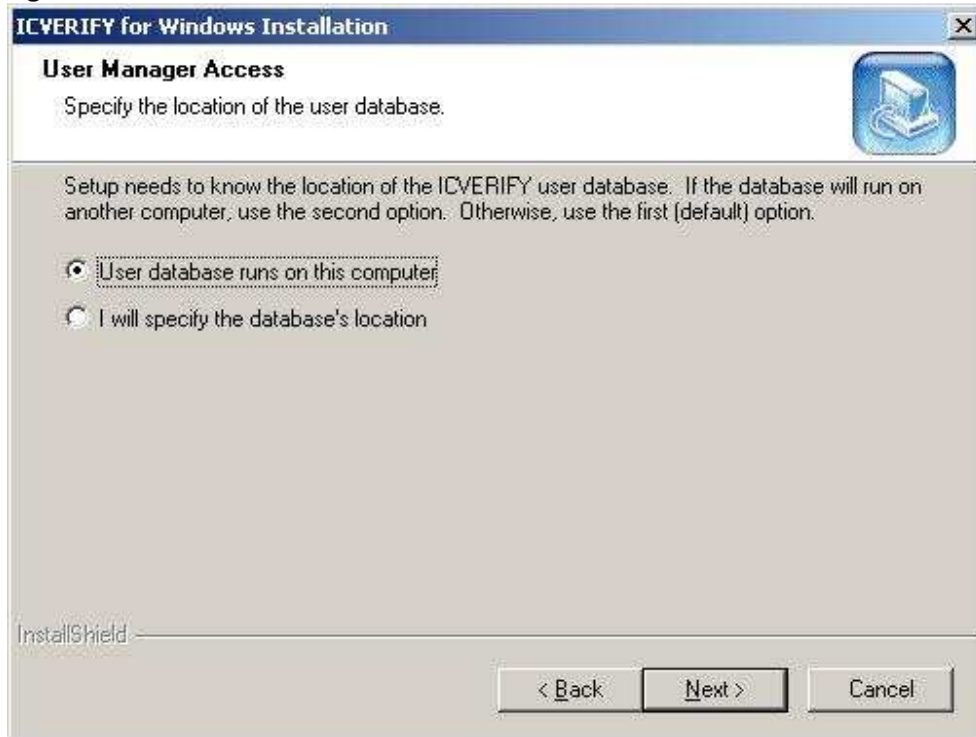
Figure 4: ICVERIFY for Windows Processor Access Screen



Step/Action

Next you have to specify the communication mode with which you intend to communicate with the host. If you want use a Internet connection, select the first option or if you want to use Dial-up modem connection, select the second option. In case you want to use both, select the first option. When you are ready to proceed, click **Next**.

Figure 5: ICVERIFY for Windows Database Location Selection Screen



Step/Action

You will be asked to specify the location of the database. You are asked to specify whether you intend to connect to the local database, or to a database in some remote machine. ICVERIFY does not install the database. It only connects to the specified database. Use the first radio button selection in place if the database resides on the local computer and the second if the database in some remote computer. Click **Next** to continue.

Figure 6: ICVERIFY for Windows Default Database Login Information Screen

This screen will come if user selects "I will specify the database's location" in the previous screen.

The screenshot shows a dialog box titled "ICVERIFY for Windows Installation" with a close button (X) in the top right corner. The main heading is "User Database Information" with a small icon of a computer monitor. Below the heading is the instruction: "Please enter the system and login information for the ICVERIFY user database." There are three input fields: "Instance Path" containing "CALTP8DB01\ICV", "User ID" containing "sa", and "Password" which is empty. At the bottom left is the "InstallShield" logo. At the bottom right are three buttons: "< Back", "Next >", and "Cancel".

Step/Action

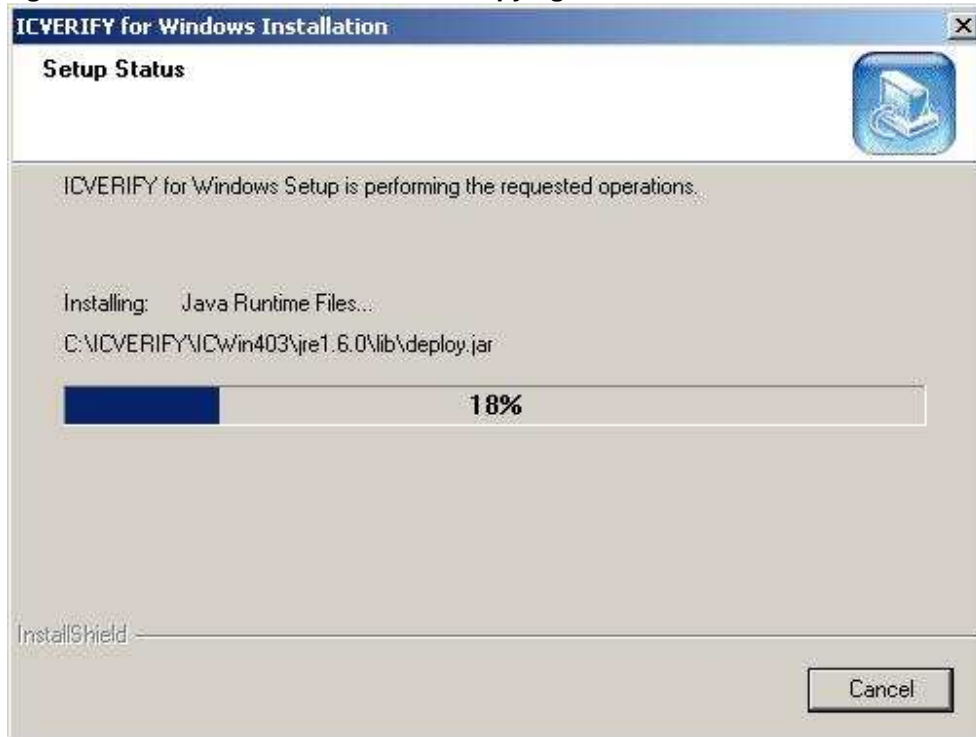
If you intend to use the database located in another machine, you will be asked to provide the login credentials (Instance Path and Password). Provide proper login information. Click **Next**.

Note: Database connection is not checked at this point. If you will be installing User Manager in the same PC later then you will need to enter the same password. The password should match the following criteria:

1. Password Length should be between 8 and 16.
2. It should have at least one numeric and one special character.

This password is only used at the time of database connection. Please remember this password as it may be required later to check the database connection using the ServerConnectionUtility application.

Figure 7: ICVERIFY for Windows File Copying Screen



Step/Action

The installation wizard will copy all the ICVERIFY files to your computer and will configure final settings.

Figure 8: ICVERIFY for Windows Upgrade prompt



Step/Action

Next you will be asked whether you want to upgrade any older version of ICVERIFY for Windows in your machine with the current version of ICVERIFY for Windows. If you select **Yes**, the ICVERIFY Upgrade Wizard will be launched. Select **No** if you want to install a fresh version of the software.

If there are any open batches in the version that you want to upgrade, then installation setup will give the following error:

Figure 9: ICVERIFY for Windows Open Batch prompt



You need to settle the all open batches then you can run the upgrade wizard, icvupg.exe, later after the installation. This executable resides in the installation folder of ICVERIFY.

On launching the ICVERIFY GUI or the ICVERIFY Multi application after an upgrade/overlay operation, a message prompt would be displayed asking you to verify the history, customer and the installment data files on the new installation and then run the PCVXSecureDelete.exe tool. You would be able to perform transactions only after the earlier installation data is securely deleted by running the PCVXSecureDelete.exe tool.

Figure 10: The following message prompt would appear on launching the ICVERIFY GUI after an upgrade/overlay operation.

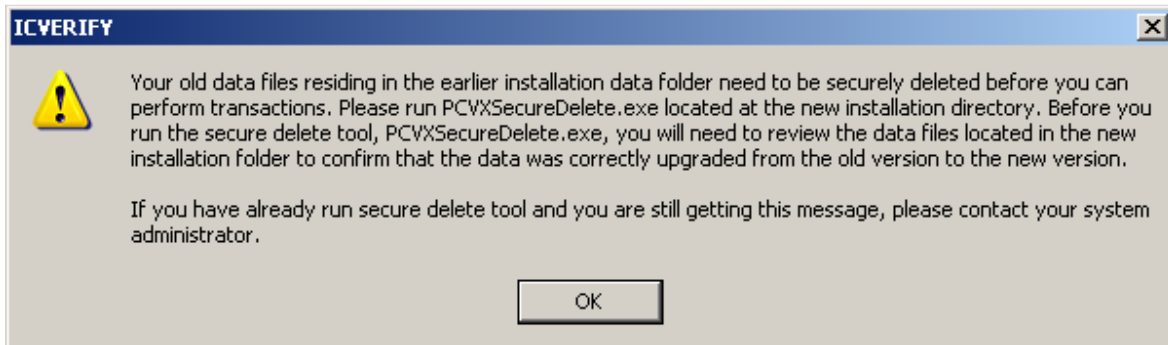


Figure 11: The following message prompt would appear on launching the ICVERIFY Multi application after an upgrade/overlay operation.

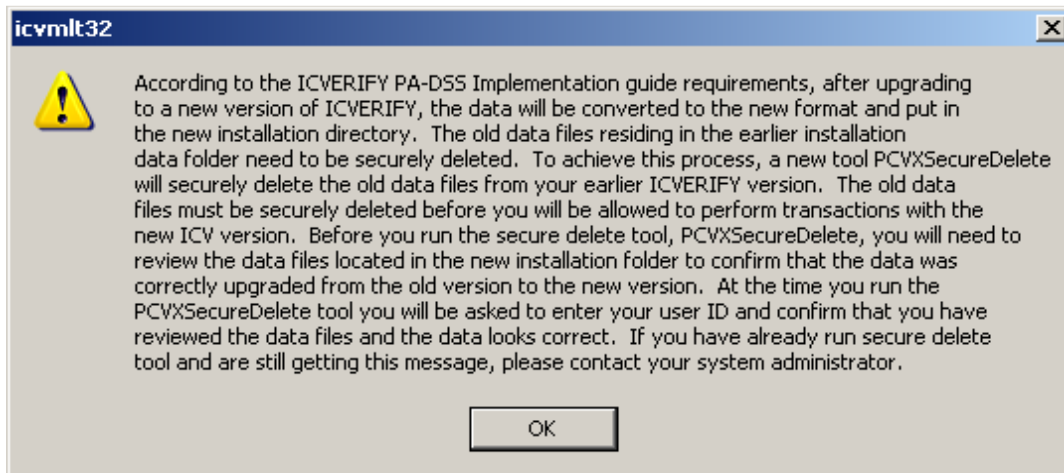


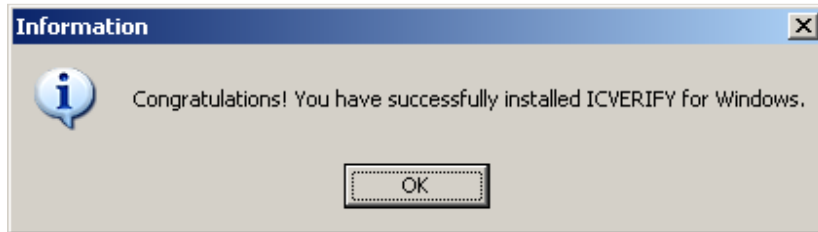
Figure 12: ICVERIFY for Windows 'ICVMLT32 as a service' prompt



Step/Action

Next you will be asked whether you want to install the icvmlt32 component as a service. Select **No** if you want to use the ICVERIFY in single user mode.

Figure 13: Congratulation Message upon completion of ICVERIFY installation



Your First Login

The ICVERIFY for Windows comes equipped with one “built in” administrator account that you can use to set up your users and profiles after installation. This default account exists for your convenience as the application administrator and should not be left in its default state. The default account information is as follows:

- User name: **sysadmin**
- Password: **administrator1\$**

NOTE: This default administrator account is capable of performing all actions in each respective product, to help you perform your initial installation and configuration with ease.

You can use the default accounts for your initial login and configuration activities. However, you will be required to change the password upon your first login.

DO NOT LOSE OR FORGET YOUR NEW PASSWORD! ICVERIFY, Inc. cannot tell you what it is and you will be unable to operate your software without it.

IMPORTANT NOTE: After an upgrade or an overlay operation, ICVERIFY requires you to run the Setup file and save it. After this operation, you will be allowed to login into the ICVERIFY GUI or initialize the ICVERIFY Multi application. While opening up the Setup file for the first time after an upgrade/overlay, you must not change the data directory as all data resides in that location. ***If you change the data directory then ICVERIFY will point to the new data location and the re-encryption process of the old data will never take place resulting in the data loss.***

Uninstalling the ICVERIFY for Windows Application

To Uninstall ICVERIFY, you need to go to Start->Programs->ICVERIFY for Windows 4.2.0-> Uninstall ICVERIFY for Windows 4.2.0

Figure 14: ICVERIFY for Windows Open Batch prompt



Step/Action

If you have any unsettled transaction in the batch, you will not be able to uninstall the ICVERIFY for Windows. You have to settle all your transactions before you can uninstall the software from your system.

Configuring ICVERIFY for Windows

To configure ICVERIFY for Windows, please refer to the *ICVERIFY 4.2 Setup Guide.pdf*.

User Manager Installation

The ICVERIFY User Manager is an easy-to-use application that allows you to create and assign user accounts and usage profiles for both ICVERIFY for Windows product users.

The User Manager can be found on the following installation CD-ROMs:

- The main ICVERIFY for Windows Installation CD

Follow the steps mentioned below to install the User Manager:

When you first start the installer, you will see the screen shown in Figure 1:

Figure 1: User Manager Welcome Screen



Step/Action

From the Welcome screen, click **Next**.

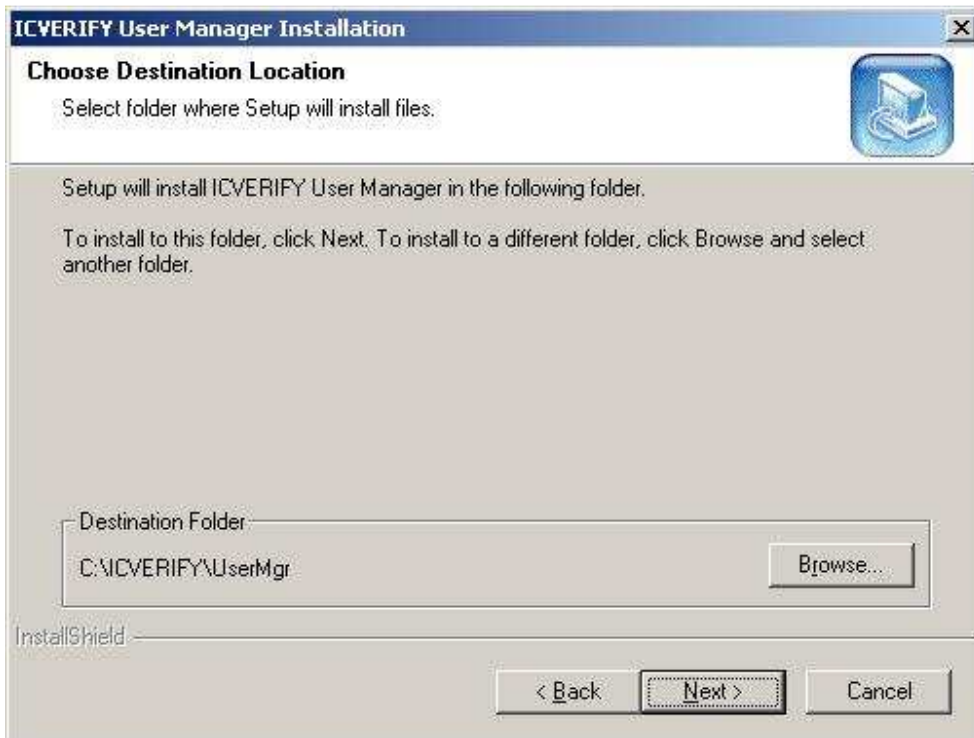
Figure 2: User Manager License Agreement Screen



Step/Action

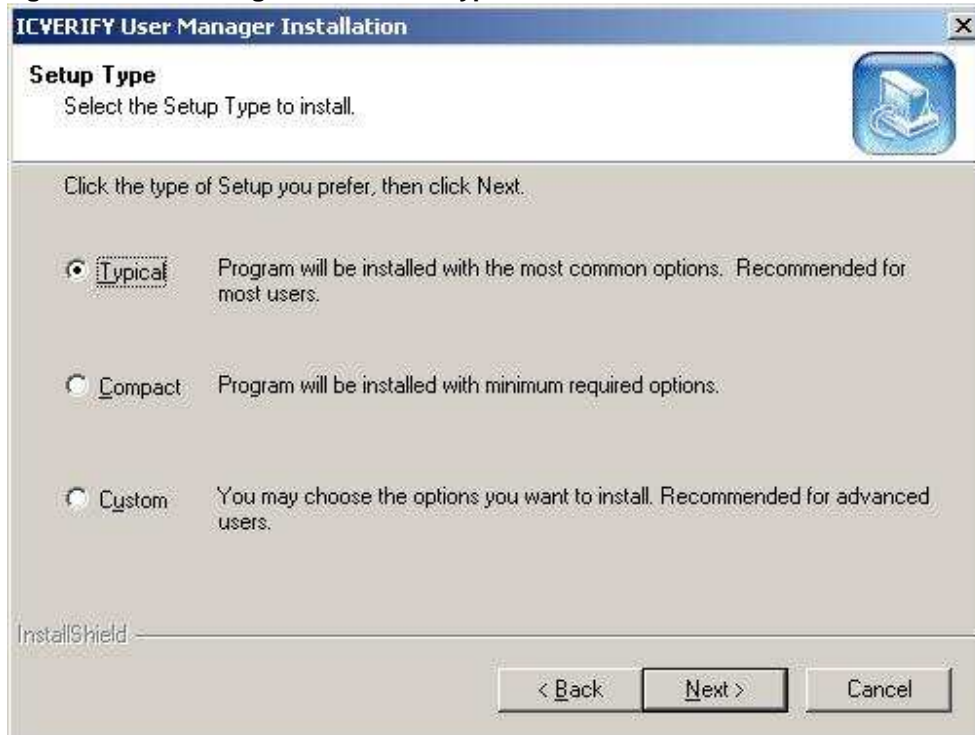
Read the End-User License Agreement displayed in the screen. If you agree to the terms of use, click **Next** to proceed with the installation; otherwise click **Cancel**.

Figure 3: User Manager Installation Folder Location Screen



Step/Action

Next you'll be asked where you want to install the User Manager application. The default folder is C:\ICVERIFY\UserMgr. Change this if you wish by clicking the **Browse** button and selecting a different installation folder. When you are ready to proceed, click **Next**.

Figure 4: User Manager Installation Type Screen**Step/Action**

Now you will arrive at a screen where you are asked to specify the type of installation you wish to perform.

Choose **TYPICAL** if you wish to do the following:

- You are installing the User Manager for the first time, and you want all the components to be installed on the same computer.

Choose **COMPACT** if you wish to do one of the following:

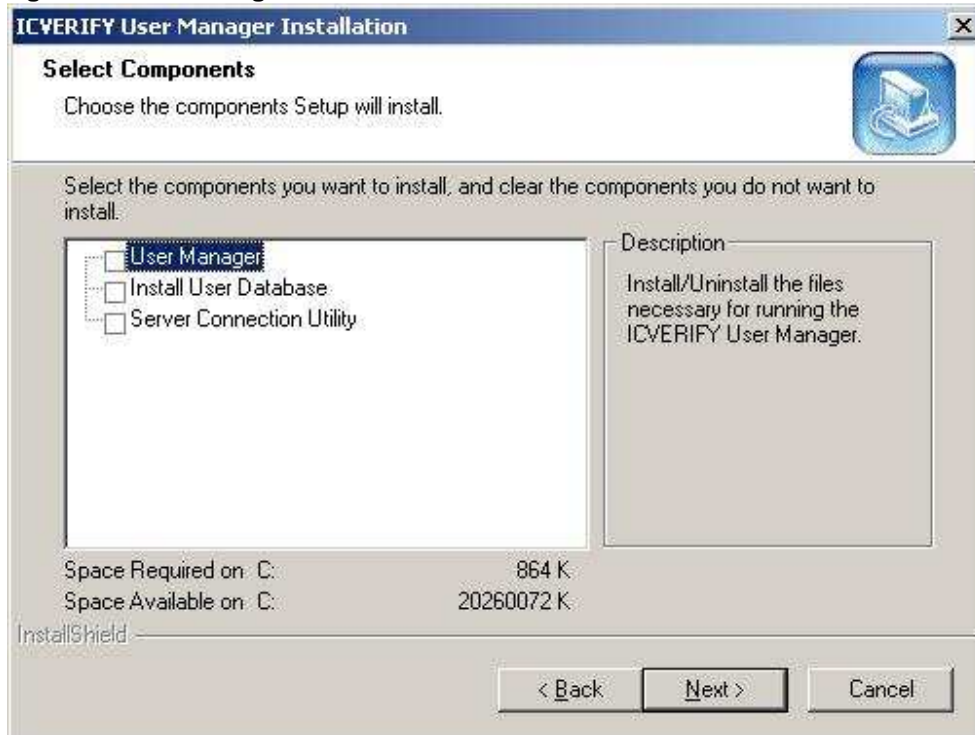
- You want to install the User Manager application, but connect it to a previously installed instance of the database residing on some other machine in the network.

Choose **CUSTOM** if you wish to do one of the following:

- You want to install the User Manager application, but connect it to a previously installed instance of the database residing on the same computer.
- You want to install only the database and have previously installed instance of the User Manager application residing on same or another computer.
- You want to install only the Server Connection Utility.

If you select **Custom**, you will see the screen shown in Figure 5.

Figure 5: User Manager Custom Installation Screen

**Step/Action**

- If you want to install only the User Manager application, you should check the **User Manager** component.
- If you only want to install the database, you should check only the **Install User Database** component.
- If you want to install only the Server Connection Utility, you should check the **Server Connection Utility** component.

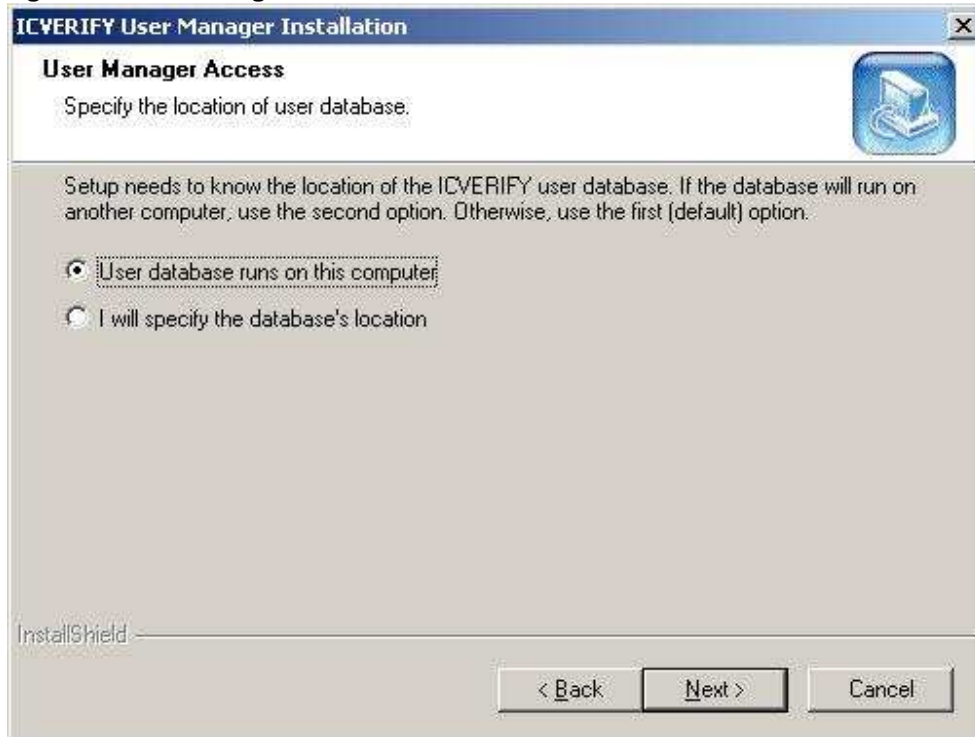
When you have decided on the type of installation you wish to perform (either from the screen in Figure 4 or 5), click the **Next** button.

The installation wizard will check the computer to see if Internet Explorer 6.0 SP1 or above is currently installed. If it is not present, then the installation will be aborted and you will need to run the Internet Explorer 6.0 SP1 or above setup from your Windows CD-ROM or you can download from Microsoft website and re-run the User Manager Installation process.

Then the installation wizard will check the computer to see if Microsoft .Net Framework 2.0 is currently installed. If it is not present, then the User Manager installer will start the .Net Framework installation process. When the installation is completed, click **Finish**.

The following step/screen will be displayed according to the type of installation the user chose between **TYPICAL**, **COMPACT** and **CUSTOM**.

Figure 6: User Manager Database Access Screen



Step/Action

If you have selected **CUSTOM** or **COMPACT** Installation, you will then be asked to specify the location of the database. You are asked to specify whether you intend to connect to the local database, or to a database in some remote machine. Select the first radio button selection in place if the database resides on the local computer and the second if the database resides in some remote computer. Click **Next** to continue.

Figure 7: User Manager Default Database Login Information Screen



ICVERIFY User Manager Installation

User Database Information

Please enter the system and login information for the ICVERIFY user database.

Instance Path :

User ID :

Password :

InstallShield

< Back Next > Cancel

Step/Action

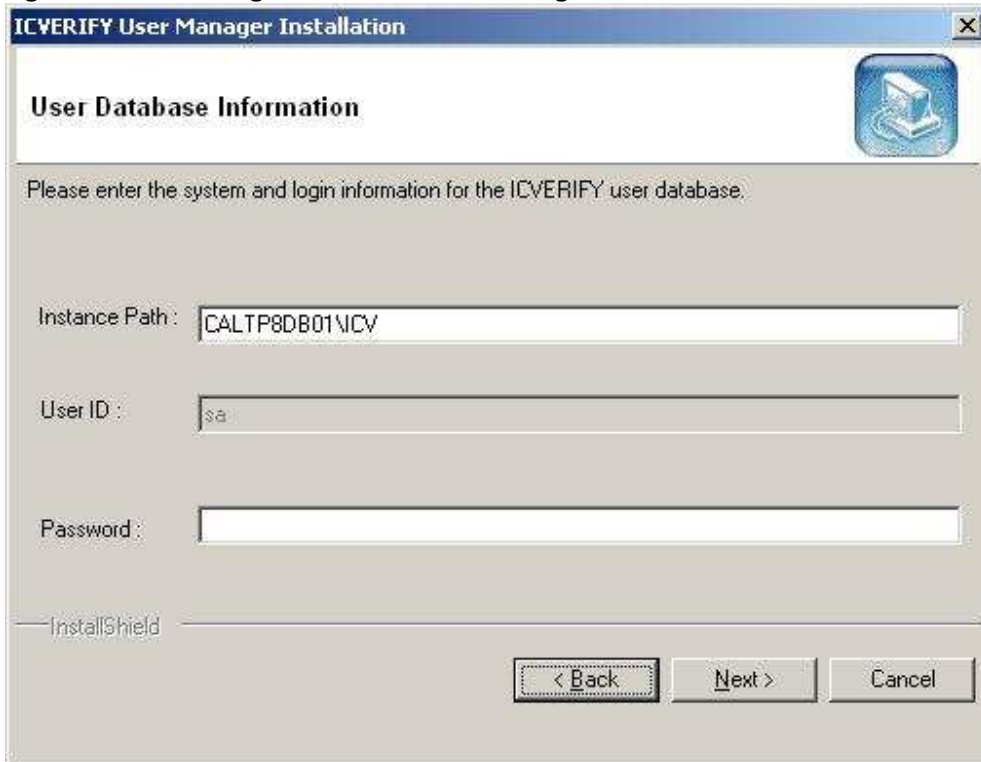
If you have selected **TYPICAL** installation with customized user information or **CUSTOM** installation, then you will be asked to provide the login credentials (in this case, only the password). Provide proper login information. Click **Next**.

Note: Please provide complex password that should meet the following criteria:

1. Password Length should be between 8 and 16.
2. It should have at least one numeric and one special character.

This password is only used at the time of database connection. Please remember this password as it may be required later to check the database connection using the ServerConnectionUtility application or at the time of installing ICVERIFY.

Figure 8: User Manager Remote Database Login Information Screen



Step/Action (This step is for COMPACT installation only)

If you have selected **COMPACT** installation with database in remote machine, then you will be asked to provide the login credentials. Provide proper login information. This will be the password of your existing database. Click **Next**.

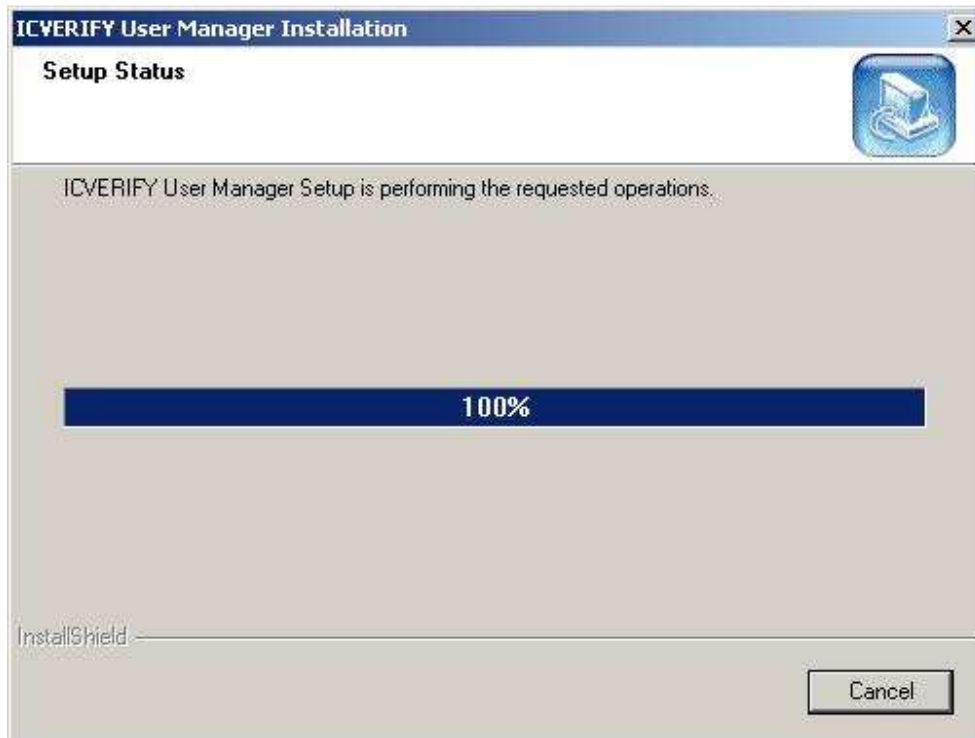
Figure 9: User Manager Database Already Present Screen



Step/Action (This step is for TYPICAL /CUSTOM installation only)

If you have selected **TYPICAL** or **CUSTOM** installation and if there is any instance of the database in the machine, then you will be asked to specify whether you want to install a fresh instance of the database or connect to the existing database. If you want to install a fresh instance of the database, then select the first radio-button. In this case, the previous instance of the database will get removed. If you want to upgrade the existing database, then select the second radio-button. Click **Next**.

Figure 10: User Manager File Copying Screen



Step/Action

You are now in the final phase of the installation process. The installation wizard will copy the final User Manager files to your computer, configure final settings, and will prompt you if you wish to restart your computer now or do it later.

Select **Yes, I want to restart my computer now** and click **Finish**.

Always remember that it is mandatory to restart the computer after installing the User Manager application, else the application won't work.

Your First Login

The User Manager comes equipped with one "built in" administrator account that you can use to set up your users and profiles after installation. This default account exists for your convenience as the application administrator and should not be left in its default state. The default account information is as follows:

- User name: **sysadmin**
- Password: **administrator1\$**

NOTE: This default administrator account is capable of performing all actions in each respective product, to help you perform your initial installation and configuration with ease.

You can use the default accounts for your initial login and configuration activities. However, you will be required to change the password upon your first login.

DO NOT LOSE OR FORGET YOUR NEW PASSWORD! ICVERIFY, Inc. cannot tell you what it is and you will be unable to operate your software without it.

Now you will be able to use User Manager to create required number of users for ICVERIFY and User Manger.

Uninstalling/Modifying the User Manager Application

If User Manager is already installed in your computer and you are running the User Manager installation setup then the installer will detect the previous installation and pop up a maintenance screen asking you what operations you wish to perform.

Figure 11: User Manager Maintenance Options Dialog



Step/Action

Unless you are intentionally modifying only specific parts of the application, select the **Remove** option button and follow the removal prompts. Then install the application as though you are doing so for the first time. Your user database will be retained and you can still upgrade it without losing your existing accounts. If you are trying to install certain parts of the application which you have not installed before, then select **Modify** from the options.

ICVERIFY for Windows SDK Installation

The ICVERIFY® Software Developer's Kit (SDK) provides tutorials that explain how to use the available sample code to integrate with ICVERIFY. You'll also find sample transactions that you can copy and paste right from this kit. It also provides Transaction Builder utility that is applicable for preparing the exact request files for transaction processing. You will use this application only when submitting the transactions into ICVERIFY via any third party application.

The ICVERIFY for Windows SDK can be found on the following installation CD-ROMs:

- The main ICVERIFY for Windows Installation CD

Follow the steps mentioned below to install the ICVERIFY for Windows SDK:

When you click on the option "Install Software Developer's Kit" in installation splash screen (please refer to "Installing and Setting Up the ICVERIFY Application"), you will see the screen shown in Figure 1:

Figure 1: ICVERIFY for Windows SDK Welcome Screen



Step/Action

From the Welcome screen, click **Next**.

Figure 2: ICVERIFY for Windows SDK License Agreement Screen



Step/Action

Read the End-User License Agreement displayed in the screen. If you agree to the terms of use, click **Yes** to proceed with the installation; otherwise click **No**.

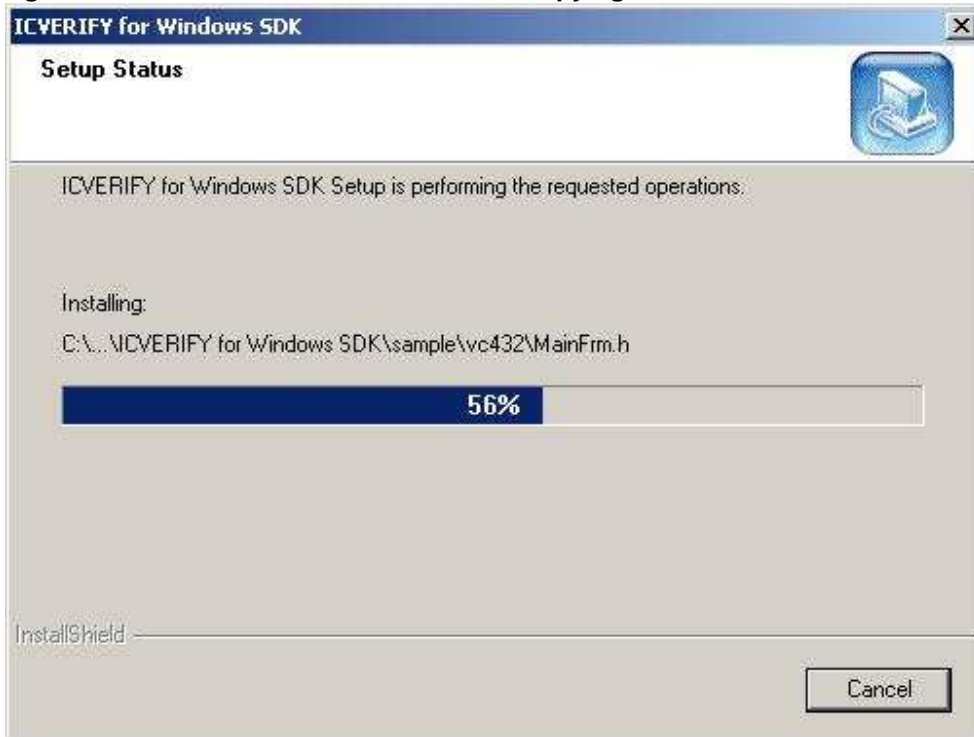
Figure 3: ICVERIFY for Windows SDK Installation Folder Location Screen



Step/Action

Next you'll be asked where you want to install the ICVERIFY for Windows SDK application. The default folder is C:\Program Files\ICVERIFY for Windows SDK. Change this if you wish by clicking the **Browse** button and selecting a different installation folder. When you are ready to proceed, click **Next**.

Figure 7: ICVERIFY for Windows SDK File Copying Screen



Step/Action

The installation wizard will copy the all SDK components to your computer and will configure final settings.

Figure 9: ICVERIFY for Windows SDK Installation Complete Screen

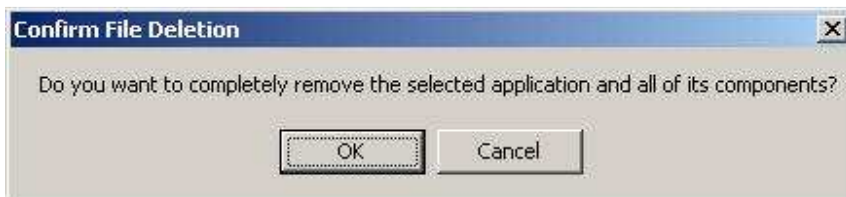


Step/Action

Click **Finish** to complete the installation.

Uninstalling the ICVERIFY for Windows SDK Application

Figure 11: ICVERIFY for Windows SDK File Deletion prompt



Step/Action

Click **OK** to uninstall the software.

Configuring ICVERIFY for Windows SDK

To configure ICVERIFY for Windows, please refer to the *ICVERIFY 4.2 SDK Guide.pdf*.

Please Note:

It is highly recommended that you reboot the computer in which you install the ICVERIFY software. Operating System resources get re-initialized once you reboot the computer. This will help you avoid operating system related issues and keep ICVERIFY performing efficiently.

Typical Installation Issues

ICVERIFY, Inc. has not encountered any significant issues with installing the both the applications on multiple computers running various operating systems. However, there are a few things you should keep in mind when attempting to install the application.

Prerequisites

The User Manager and ICVERIFY for Windows have four main prerequisite application packages that it needs to run:

- Internet Explorer 6.0 SP1 or later,
- Microsoft SQL Server® 2005 Service Pack 4 Express Edition,
- Microsoft .NET® Framework 2.0 or later,
- Microsoft Visual C++ 2005 SP1 Redistributable Package (x86) for Windows 32 bit versions - or - Microsoft Visual C++ 2005 SP1 Redistributable Package (x64) for Windows 64 bit versions.

If your computer does not meet the minimum requirements for these prerequisites, you may experience problems running the applications. However, the System Requirements section in this guide also account for the minimum requirements for all the prerequisites, so if your computer meets the System Requirements, you should be fine.

Insufficient System Permissions

Many installation issues can be traced to attempting to install the application under a user account that does not have administrator-level permissions to the computer. If you are running an operating system that supports user accounts, be sure you are installing under an account with administrator-level permissions to both the PC and the system registry.

Earlier Version of .NET

This version of the User Manager and ICVERIFY for Windows were built under the .NET Framework version 2.0. It is possible that you already have an earlier distribution package of the .NET Framework installed. You should make sure that you can install a working copy of the .NET Framework 2.0 Redistributable Package.

Firewall and Service Activities

If you have installed the Windows Firewall application that comes with Windows XP Service Pack 3, Windows Server 2003, Windows Vista or Windows 7, it may have disabled certain Windows services that the prerequisite applications require to function. Check your Services list to make sure the **Server** service is enabled to run on startup. Also be sure that the **Named Pipes** service is enabled by selecting File and Printer Sharing / TCP port 445. The User Manager interacts with the database by means of SQL Server named pipes.

Prior or Other Versions of SQL Server

The ICVERIFY for Windows installation CD-ROM contains the most recent distribution of the Microsoft SQL Server 2005 Express Edition available. If, however, you choose to install the User Manager or ICVERIFY for Windows on one computer, and connect it to a database on a different computer, you may experience connection problems if the database computer is running a version of SQL Server other than SQL Server 2005 Express Edition. You can either download this version from <http://www.microsoft.com>, or install it from the installation CD-ROM.

More Information

More information on troubleshooting installation issues for the prerequisite applications may be found at <http://www.microsoft.com>. If you have other specific questions, contact the ICVERIFY Inc. Help Desk at (800) 900-6133.