# **Monetra**<sup>®</sup> Software Installation Guide

Installation and Maintenance Guide v7.6 Updated September 2011

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## **1 Overview**

#### **1.1 Document Revisions**

This document was recreated on 10/17/2006.

Document updated to reflect changes in Monetra up to version 7 update 6.2 [Sep, 2011]

#### **1.2 Related Documentation**

- Monetra Installation Guide
- Monetra Configuration Guide
- Monetra Secure Implementation Guide

### 2 Pre Installation

The very first step in installing Monetra will be ensuring that your platform is *ready to go*. Major points of interest include system communications, data storage and payment application security.

#### 2.1 Platform Specific Notes

Designed in C and conforming to POSIX standards, Monetra runs on many of today's most advanced operating systems including Linux, FreeBSD, Mac OS X and Microsoft Windows. We have outlined some notes below to point out platform-specific information you should be aware of prior to installing Monetra.

Please reference our OS Support FAQ for more OS support policies: http://www.monetra.com/faq/support/01\_os\_policy.html

#### 2.1.1 Linux

Monetra is a self-contained application developed on the Linux platform and ported to other OS's. Multiple Linux distributions are supported (even hand crafted); its only requirement for Linux systems is that you have a supported version of GLIBC on your machine:

Your version must be at 2.3.2 or higher

http://www.gnu.org/software/libc/libc.html

#### 2.1.2 FreeBSD

Monetra has been ported and tested to run optimally on the FreeBSD 7 and FreeBSD 8 series.

#### 2.1.3 Solaris

Monetra has been ported and tested to run optimally on Sun Solaris 8, Sun Solaris 9 and Oracle Solaris 10 (for SPARC).

#### Note:

 The Monetra Installer may need to add user accounts to the system and does so via the useradd -m \${USER} method. You must properly configure your system to allow this, specifically, you need to set up the default home directory. Most sysadmins most likely will have already done this, but if not, this is an easy way:

mkdir -p /export/home useradd -D -b /export/home

- · GNU gzip in order to extract our Monetra Installer package
  - Current versions appear to include this already, if not, download from <a href="http://sunfreeware.com">http://sunfreeware.com</a>
- A suitable random number/entropy source. This is used for cryptographic operations.
  - Solaris 9 and 10 already have this, and fully patched versions of Solaris 8 (#112438) do
     as well

• If not, either install patch #112438 or <u>http://www.cosy.sbg.ac.at/~andi/SUNrand/</u>

#### 2.1.4 IBM AIX

Monetra has been ported and tested to run optimally on IBM AIX 5.3+

#### Note:

Requires 5.3 TL11 or higher.

#### 2.1.5 SCO OpenServer

Monetra has been ported and tested to run optimally on SCO OpenServer release 5 and 6

#### Notes:

- GNU gzip in order to extract our Monetra Installer package
  - v6 has it already
  - v5 Available from: <u>ftp://ftp2.sco.com/pub/skunkware/osr5/vols/gzip-1.2.4-VOLS.tar</u>
- A suitable random number/entropy source. This is used for cryptographic operations.
  - v6 and v5.0.7 appear to already include PRNGd. But if not for some reason, available here:
    - <u>ftp://ftp2.sco.com/skunkware/osr5/vols/prngd-0.9.23-VOLS.tar</u>
  - If installing the skunkware PRNGd, the socket listens at a non-standard location so a symlink is necessary:

ln -sf/usr/local/var/prngd/prngd-pool/dev/egd-pool

#### 2.1.6 Mac OS X

Monetra has been ported and tested to run optimally on Mac OS X 10.5, 10.6 and 10.7

#### 2.1.7 Microsoft Windows®

Monetra has been ported and tested to run optimally on all x86/amd64 versions of Microsoft Windows still supported by Microsoft including: 7, Visa, XP, Server 2008/2003

#### Note:

To remain compliant with PCI/CISP and other security standards you must be able to provide OS level security patches to your systems and thus, you must be running a vendor supported OS.

#### **2.2 Communication Notes**

Monetra is classified as a "middleware" software product. With that said, Monetra must be set up to provide both "internal" and "external" connections. It is helpful to keep in mind what communication functionality is required prior to setting up the engine.

#### **2.2.1 Supported Internal Application Connections**

**Internal:** These connections facilitate communication between Monetra and the client application (like POS and WWW).

| Connection Type | Description  |
|-----------------|--|
| DropFile        | Provides a quick and reliable method to communicate with Monetra to process transactions. Although IP or SSL connections are recommended, the DropFile does provide for legacy application connectivity. Please review the Monetra Secure Implementation Guide when implementing drop files. |
| TCP/IP          | Client applications can use standard TCP/IP socket to pass transactions to<br>Monetra. You will need to ensure you have an IP stack installed and functioning<br>on your system prior to installing Monetra.   |
| SSL             | Client applications can use Secured Sockets Layer (SSL) to pass transactions to Monetra. For an overview of SSL, please review online F.A.Q's at http://www.monetra.com.   |
| HTTP/HTTPS      | Client application can use our XML message format to communicate with the Monetra server. For an overview of XML, please review the Monetra Protocol Guide available at http://www.monetra.com.  |

#### 2.2.2 Supported External Application Connections

**External:** These connections facilitate communication between the Monetra Payment engine and the processing institutions. Currently Monetra can utilize modems, HTTPS (Internet) and Frame Relay (IP) connections for outbound processing.

| Connection Type | Description  |
|-----------------|--|
| Modems          | Even if you plan on connecting via HTTPS or frame-relay, it is highly recommended to configure a modem for fail-over processing. Modems are supported as a communications link across all certified platforms. Multiple modems can be used simultaneously and they do not have to be of the same brand/make/model. |
|                 | Please consider the following:   |
|                 | <ul> <li>most processing is done at 1200 bps or less so that old modems will<br/>work great.</li> </ul>  |
|                 | <ul> <li>Monetra provides for configuring initialization strings on a per modem<br/>basis (take note of your modem's init strings)</li> </ul>  |
|                 | <ul> <li>Main Street has found that USR's brand of modems have been<br/>successfully used by clients across all platforms (no, we do not sell<br/>USR modems)</li> </ul>   |

| HTTPS/SSL via<br>Internet | Certain processors allow direct connectivity via SSL/HTTPS (Internet) for<br>authorization and settlement requests. Main Street can provide the connection<br>parameters for you, but be advised of potential security settings (like firewall<br>etc.) that may need adjustment. Please visit our online F.A.Q's for more<br>information on connecting to the processor via the Internet. |
|---------------------------|--|
| Frame Relay (IP)          | Monetra supports direct processing via dedicated circuits to multiple processing institutions. Please be advised that these lines must be provisioned from the chosen processor, and that Monetra may need to be verified (tested) once in place prior to the system going live. Typical turnaround on a dedicated ckt/Monetra setup is 60 days.   |

#### 2.3 Data Storage Notes

Monetra allows you to choose between the default SQLite database OR an SQL database of your choice. Both database layouts are structured the same within Monetra, so neither will give you more functionality in Monetra than the other. Any decision between the two should be based on redundancy/volume.

#### 2.3.1 Monetra Default Database

The default SQLite is provided to be used where the use of an external SQL database server is not convenient. Drawbacks to this database are audit-level query performance and data replication provided by most external SQL databases (i.e. Oracle, MySQL, PostgreSQL).

#### 2.3.2 SQL Database

SQL database support in Monetra is targeted towards high transaction load servers where hundreds of thousands to millions of transactions will be initiated each year (or even each month!). SQL databases provide the speed and reliability needed to store and recall high-volume transaction data.

Prior to installing Monetra, ensure that you have your database properly installed with the following parameters configured:

- Database: Create a database or tablespace for explicit use by Monetra.
- **Security:** Set the permissions on the database and note the username and password for the "Monetra" database (for future configuration entries).
- **Connection:** If the database is a remote machine, note the IP address and port number used to connect (for future configuration entries).

#### Note:

If you use MYSQL, please read this! Monetra requires the use of at least MySQL v5

#### 2.4 Security Notes

Monetra provides an advanced solution for the security-conscious company. Whether it's getting the transaction to Monetra securely or how Monetra handles that transaction once it's been received, our primary focus while developing Monetra was the security of our clients' customer data.

Note: Please review the *Monetra Secure Implementation Guide* for further information.

#### 2.4.1 IP/SSL

If you will be running Monetra in IP mode, you may want to consider securing your communications via (SSL) or other similar encryption schema. It is also recommended to deploy Monetra's extended firewall rule set features as outlined in the secure implementation guide.

#### 2.4.2 Data Encryption

Monetra fully supports *strong algorithmic encryption* to provided safe data storage. Multiple algorithms and key-lengths may be used so please review the *Monetra Secure Implementation Guide* prior to setting any values.

#### 3.1 Monetra Installer Utility

As of version 5.0, Main Street provides an advanced Installation and Update utility for all supported platforms called the *Monetra Installer*. The utility is provided in both Graphical (GUI) and command line (console) binary executable form.

The installation instructions provided in this manual describe the procedures when using the Monetra Installer. If you have a need to install software without using the Installer Utility then please contact <a href="mailto:support@monetra.com">support@monetra.com</a>

**Example:** Screen shots of the Installer running on multiple platforms can be viewed below:

| Amonetra Installer  | O O Monetra Installer   |
|---|---|
| Install         Reinstall         Operade         Weinstall         Operade         Info           Licence ID         Product         O5         Type         Status         Ver Inst. Latest Ver         Inst.Cft.   | Install Reinstall Uninstall Upgrade   |
| 9996     Monetra Paymert Engine     windows-x86     Real     Installed     5.4.0     5.4.0     (beta)     1       9997     Monetra B     Image: Second Se | License ID     Monetra Installer       9496     Monit     Monetra Installer     5.5.0     2       9498     Monit     There are 4 programs ready to be Installed.<br>Would you like to install all of them now?<br>force the work one, and install the most recent vers<br>ions)     5.5.0     2       9499     Monit     Vers     Nor     2.0.2 (beta)     1       9500     Monetra Installer     Nor     2.0.2 (beta)     2       9501     Monetra Installer     macosx-ppc     Real     Installed     1.0.9     0   |
| Ext Contraction Microsoft Windows   | GUI Installer on. Mac OS X  |
| X Moneira Installer ? – 🗆 X   | Session Edit View Bookmarks Settings Help   |
| Please select one package to install, update or remove           LICENSEID         PRODUCT         OS         TYPE         STATUS         VER INST         LATEST VER         INST           4765         Monetra Installer         Inux-x86         DEMO         installed         1.0.2         1.0.2           4764         Monetra Installer         Monetra Installer         Istaller         2         Image: Applied to the staller           4766         Monetra Installer         Installer         Image: Applied to the staller         1.0.2         1.0.2  | Retrieve Licenses: Closing connection [************************************   |
| 4769 Monet       There are 5 programs ready to be installed.       0         4766 Monet       Would you like to install all of them now?       0         4767 Monet       (note: this will use the default installation paths for each one, and install the most recent versions)       0   | LICENSEID[PRODUCT         [OS         [TYPE]STATUS         [VER INST[LATEST VER]INST CMT           1         14765         Monetra Installer         [linux-x86]DEMD[installed         [1.0.2         [1.0.2         [1           14764         Monetra Payment Engine Linux-x86]DEMD[installed         [1.0.2         [1.0.2         [1           14768         Monetra Administrator         [linux-x86]DEMD[installed         [1.6.0         [1           14769         Monetra Configurator         [linux-x86]DEMD[installed         [1.6.0         [1           14766         Monetra Configurator         [linux-x86]DEMD[installed         [1.6.0         [1           14767         Monetra Romfigurator         [linux-x86]DEMD[installed         [1.6.0         [1 |
| Install Upgrade Uninstall Dicense Upd. Transfer Dic. Info  Exit Back  | There are 5 programs ready to be installed.<br>Would you like to install all of them now?<br>(note: this will use the default installation<br>paths for each one, and install the most recent versions)<br>? [Yes]No] :[]   |
| GUI Installer on. Linux   | Shell Shell Shell No. 2   |
|   | Console Installer on Linux  |

#### 3.1.1 Table Headers

When you are logged into the installer, you should be presented with a table displaying the following header information: Note: Rows in GREEN indicate Installed, rows in YELLOW indicate an upgrade is available, rows in RED indicate an available license that is not installed and rows in GREY indicate a license that is unavailable.

| License ID | Product                   | OS          | Туре | Status            | Ver Inst | Latest Ver   | Inst Cnt |
|------------|---------------------------|-------------|------|-------------------|----------|--------------|----------|
| 9496       | Monetra Payment Engine    | windows-x86 | Real | Installed         | 5.4.0    | 5.4.0 (beta) | 1        |
| 9497       | Monetra Payment Connector | windows-x86 | Real | Upgrade Available | 1.0.5    | 1.0.6 (beta) | 1        |
| 9498       | Monetra Client            | windows-x86 | Real | Installed         | 2.0.1    | 2.0.1        | 0        |

LICENSEID: This is the license number on file for any particular software product.

**PRODUCT:** This is the friendly name of the software product as licensed.

OS: This represents the operating system and architecture of the software product licensed.

**TYPE:** This defines whether or not the license is REAL or a DEMO.

**STATUS:** This notifies user if the software is installed or not.

**VER INST:** This represents the software version installed on the system.

Latest Ver: This represents newest version available.

INST CNT: This represents the number of times the software has been installed/reinstalled.

#### 3.1.2 Available Functions

The Monetra Installer utility provides for the following Functions...

|                  | Monotra Inc | tallor                      |                       |                               |                        |                        |              |             |               |
|------------------|-------------|-----------------------------|-----------------------|-------------------------------|------------------------|------------------------|--------------|-------------|---------------|
|                  | Install     | Reinstall                   | <b>S</b><br>Uninstall | <b>t</b><br>Upgrade           | Update                 | <b>Transfer</b>        | Jinfo        |             |               |
| INSTAL           | L/REINS     | TALL: The                   | install -re           | einstall butto                | on provide             | es a means             | s to install | new produ   | icts.         |
| UNINS            | TALL: The   | e Uninstal                  | l button v            | vill remove                   | the sele               | cted softv             | vare prod    | uct from t  | he system.    |
| UPGRA<br>based c | DE: The     | upgrade b<br>eligibility.   | utton will o          | download a                    | nd upgra               | de the soft            | ware to the  | e most curi | rent release  |
| UPDAT<br>system. | E: The lic  | ense upda                   | te button             | will downloa                  | ad the mo              | ost current            | license file | e and insta | ll it to the  |
| TRANS<br>would b | FER: The    | e transfer li<br>transfer a | cense but<br>DEMO lic | ton will trar<br>cense to a F | nsfer one<br>REAL lice | eligible lice<br>nse). | ense for ar  | nother (For | example, this |
|                  |             |                             |                       |                               |                        |                        |              |             |               |

#### NFO: The info button will list out all the details for a particular product/license.

#### 3.2 Installation on Unix/Linux

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While the instructions provided in this section are targeted towards Linux users, the information applies to all Unix/Unix\_like Operating environments.

NOTE: These instructions assume the target server has a functioning Internet connection. If you need to download the software onto a CDROM then please contact support@monetra.com

#### 3.2.1 Download the Monetra Installer Utility

- Visit our website at <a href="http://www.monetra.com/downloads.html">http://www.monetra.com/downloads.html</a>
- Download the Monetra Installer for your version of GLIBC (download section at top)
- Once downloaded, extract the tarball

#### gunzip -c monetrainstaller-linux-x86-glibc23-1.0.9.tar.gz | tar xvpf -

• Enter directory created

#### cd monetrainstaller-linux-x86-glibc23-1.0.9

• Run the monetra installer utility. Note, if you do not have a windowing environment set up (i.e. X-Windows), then use the console application.

#### ./monetrainstaller\_console

If you do have X-Windows running you may run the graphical installer

#### ./monetrainstaller

The following section outlines the installation of software using the console front end to the installer application.

#### STEP 1. Run the Installer Utility

| demo@dem<br>demo@dem<br>demo@dem<br>Welcome | ~/monetro<br>~ \$ rm -)<br>~ \$ sudo<br>to the Mone | f monetrain<br>/usr/local,<br>etra Install | linux-x86<br>hstaller-<br>/monetrai<br>ler! | -glibc23-<br>linux-x86<br>nstaller/ | 1.0.5 \$ cd<br>-glibc23-1.<br>bin/monetra | <br>0.5<br>installer_com | nsole |
|---|---|--|---|-------------------------------------|---|--------------------------|-------|
| (I) perf<br>(O) perf<br>(X) exit            | orm interne<br>orm offline                          | et installa<br>e installati                | tion<br>ion                                 |                                     |   |                          |       |
| Please cl<br>[]: []                         | noose an op   | otion                                      |   |                                     |   |                          |       |

website).

#### STEP 2. Enter your Main Street Client Credentials.

| demo@demo ~ \$ rm<br>demo@demo ~ \$ su<br>Welcome to the M                    | -rf monetrainstaller-linux-x86-glibc23-1.0.5<br>do /usr/local/monetrainstaller/bin/monetrainstaller_console<br>onetra Installer! |     |
|---|--|-----|
| <ul><li>(I) perform inte</li><li>(O) perform offl:</li><li>(X) exit</li></ul> | net installation<br>ine installation   |     |
| Please choose an<br>[]: i   | option   |     |
| Please enter you<br>[(null)]: demo@m  | r email address for authentication<br>onetra.com   |     |
| Please enter you<br>[(null)]: ******  | r password for authentication<br>**[]  | 100 |
|   |  |     |

Note: At any time you may access the client section of our website and update your company profile.

#### STEP 3. Choose Software to Install.

| Retrieve Licenses: Closing<br>[************************************  | connection<br>************************************  |  |
|--|---|--|
| 6 licenses   |   |  |
| ID PRODUCT   | OS  TYPE STATUS INST  LATEST I  |  |
| 6328 Monetra Installer<br>6324 Monetra Client<br>6325 Monetra Administrato<br>6323 Monetra Payment Engi<br>6327 Monetra Manager<br>6326 Monetra Configurator | linux-x86 REAL inst  1.0.5 1.0.5  1<br> linux-x86 REAL -   1.8.0  1<br>r  linux-x86 REAL -   1.8.0  1<br>ne linux-x86 REAL -   5.2.1  1<br> linux-x86 REAL -   1.6.0  1<br> linux-x86 REAL -   1.8.0  1<br> |  |
| (note: this will use the d<br>paths for each one, and in<br>? [Yes No] :Y]   | efault installation<br>stall the most recent versions)  |  |

Note: While applications can be installed/uninstalled and upgraded one at a time, it is easier (on i install) to install all of them at once.

#### STEP 4. End User License Agreement.

| ion will apply.   |   |
|---|---|
| 10. Severabilit<br>, this Agreemen<br>on would frustr<br>immediately ter  | ty. If any provision of this Agreement is held to be unenforceable<br>nt will remain in effect with the provision omitted, unless omissi<br>rate the intent of the parties, in which case this Agreement will<br>rminate.   |
| <ol> <li>Integration<br/>eet relating to<br/>ral or written<br/>vails over any<br/>nt, or other co<br/>ring the term o<br/>ng, unless in w</li> </ol> | n. This Agreement is the entire agreement between you and Main Str<br>o its subject matter. It supersedes all prior or contemporaneous o<br>communications, proposals, representations and warranties and pre<br>conflicting or additional terms of any quote, order, acknowledgme<br>ommunication between the parties relating to its subject matter du<br>of this Agreement. No modification of this Agreement will be bindi<br>writing and signed by an authorized representative of each party. |
| For inquiries p   | please contact:   |
| Main Street Sof<br>2831 NW 41st St<br>Gainesville, FL   | ftworks, Inc.<br>treet Suite J<br>L 32606   |
|   | this license?   |
|   | this license?   |

#### STEP 5. Finish Up.



Upon successful completion, you should get a screen similar to the following.

Thats it, you can now continue with configuring the Payment Engine, as described in the Monetra Configuration Guide.

#### 3.2.3 Installing Software via the GUI interface

If you choose to use the GUI application, then you may follow any of the examples provided for Windows or Mac, outlined below.

Note: This assumes that the machine installing the Monetra Installer has the X-libraries available.

- If X-Windows is running on the local machine and you wish to use the GUI installer, you must make sure that users other than yourself (i.e. root) on the same machine have access to the display: xhost +localhost
- If X-Windows is running on a separate machine and you have logged in via SSH with X11-forwarding enabled, you should not have to configure anything more to utilize the GUI installer.
- If X-Windows is running on a separate machine and you wish to use the GUI installer by exporting the DISPLAY over your network, you need to make sure the remote machine has permissions to send Xmessages to the machine running X-Windows; and you also need to point the DISPLAY environment variable to the proper locations. (Examples use 192.168.1.10 as remote IP running X-Windows; replace this with appropriate IP address).
  - \* xhost +192.168.1.10 (On machine running X-Windows)
  - \* export DISPLAY=192.168.1.10:0.0 (On machine you wish to install the Monetra installer)

#### 3.3 Installation on Mac OS X

#### 3.3.1 Download and Install the Monetra Installer Utility

#### Note:

This overview describes installation on the Apple Macintosh, OS X platform. Note: If you run Microsoft Windows or Mac OS X as an operating system, you may find the most current versions of the Monetra Installer in the General Support section of our website, under the downloads link. Or you may find them at this URL:





**Step 1:** Once the Installer has downloaded and been extracted, you should see a package file (.pkg) name MonetraInstaller. Double click this package to install the MonetraInstaller.









#### 3.3.2 Install Remaining Software

Once the Monetra Installer has been setup on your system, you may now run it to install all other Main Street software.

Note: You will need one of the following to proceed:

a) For a live install, you will need the credentials (email and passcode) that were assigned to you by a Main Street partner or associate.

b) For an offline install, you will need the appropriate package file which can be downloaded from the client section of our website.

**Note:** If this is your first time installing, and you have a package of software products, the installer might prompt you to install all XX number of products.

**Step 1:** Run the Monetra Installer by navigating to the Applications directory, then inside the Monetra folder:

#### Applications-->Monetra-->Monetra Installer

|              | 🚔 Monetra Installer |  |
|--------------|---------------------|--|
|              |                     | Monetra Installer v1.0.8   |
|              | M. M.               | http://www.monetra.com/  |
|              | softworks           | Copyright (c) 1999-2006  |
|              |                     | Welcome to the Monetra Installer   |
|              |                     | This application will guide you through the necessary steps to install<br>the software for which you are currently licensed. |
|              |                     | Please contact <support@monetra.com> for support with this process.</support@monetra.com>                                    |
|              |                     |  |
|              | Exit                | << Prev Next >>  |
| Step 1: When | presented with the  | e 'Welcome' screen, choose 'Next'.   |

| 🛲 Monet  | ra Installer                                      |   |                        |           |
|--|---|---|------------------------|-----------|
|  |   | Monetra Installer v1.0.8                                    |                        |           |
| Ń  |   | http://www.monetra.com/                                     |                        |           |
| sof  | tworks  | Copyright (c) 1999-2006                                     |                        |           |
| Exi  | Client Login<br>Email: rayna<br>Password: ••••    | a@monetra.com   | Disk                   |           |
| <b>Step 2a:</b> If you are p<br>'Next' button. | erforming a 'Live' insta                          | all, enter your email address a                             | and pass code, then ch | loose the |
| Step 2b: If you are ir<br>Note: You must have  | stalling 'offline', choos<br>already downloaded f | se the 'Have Disk' button.<br>the appropriate package/files | to proceed.            |           |

| Install    | Reinstall  | Uninstall U   | pgrade U                                  | pdate                         | Transfer      | J<br>Info |              |         |
|------------|------------|---------------|---|-------------------------------|---------------|-----------|--------------|---------|
| License ID | Р          | roduct        | OS  | Туре                          | Status        | Ver Inst  | Latest Ver   | Inst Cn |
| 9496       | Monetra Pa | ayment Engine | macosx-pp                                 | c Real                        | Installed     | 5.5.0     | 5.5.0        | 2       |
| 9498       | Monetra C  | 000           | 1   |                               | 1             | <u>}</u>  | 2.0.2 (beta) | 1       |
| 9499       | Monetra A  | Mon           | etra Installer<br>e are 4 programs r      | ready to be                   | installed     | 2         | 2.0.2 (beta) | 1       |
| 9500       | Monetra M  | Woul<br>(note | ld you like to insta<br>this will use the | all all of the<br>default ins | tallation     | 2         | 2.0.2 (beta) | 2       |
| 9501       | Monetra In | path<br>ions) | s for each one, and                       | d install th                  | e most recent | vers      | 1.0.9        | 0       |
| Exit       | $\supset$  | (             | Yes                                       | No                            | )             | C         | << Prev      | Next :  |

| Install    | Reinstall Uninstall                          | Upgrade Update Transfer   |                               |                  |
|------------|--|---|-------------------------------|------------------|
| License ID | Product 😝 🔿                                  |   | Latest Ver                    | Inst Cnt         |
| 9496       | Monetra Paymen                               | Monetra Installer   | 5.5.0                         | 2                |
| 9498       | Monetra Client                               | 4 Programs installed successfully!  | 2.0.2 (beta)                  | 1                |
| 9499       | Monetra Admini                               | ~   | 2.0.2 (beta)                  | 1                |
| 9500       | Monetra Manage                               | ОК  | 2.0.2 (beta)                  | 2                |
| 9501       | Monetra Installer                            | macosx-ppc Real Installed 1.0.9   | 1.0.9                         | 0                |
| Exit       | )  | C   | << Prev (                     | Next >           |
| Ipon succe | essful installation yo<br>netra Payment Engi | u should see the following dialog. Ch<br>ne (and associated utilities) should b | noose OK to<br>be installed a | exit.<br>nd read |

#### 3.4 Installation on Microsoft® Windows

#### 3.4.1 Download and Install the Monetra Installer Utility

#### Note:

This overview describes installation on the Microsoft Windows platform, but should be similar across all other supported platforms. If you run Microsoft Windows or Mac OS X as an operating system, you may find the most current versions of the Monetra Installer in the General Support section of our website, under the downloads link. Or you may find them at this URL:

Http://www.monetra.com/downloads.html

| monetrainstaller-windows-x8<br>6-1.0.3.exe                            |  |
|---|--|
| Step 1: Double click the installer .exe file to run the installation. |  |

|                                    | Monetra Installer v1.0.3 Setup 🛛 🔀     |  |
|------------------------------------|--|--|
|                                    | Monetra Installer v1.0.3 Setup Program |  |
|                                    | Would you like to continue?            |  |
|                                    | Yes No                                 |  |
| <b>p 2:</b> When asked to continue | installation, choose Yes.              |  |

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|  | Accept Decline  |
|  |   |

|                      | Monetra Installer : Directory Br      | owser             |        |  |
|----------------------|---------------------------------------|-------------------|--------|--|
|                      | Please choose an installation path    |                   |        |  |
|                      | C:\Program Files\MonetraInstaller     |                   | Browse |  |
|                      |                                       | Cancel            | Submit |  |
|                      |                                       |                   |        |  |
| Step 4: Use the defa | ault Install path or choose an alterr | nate and click Su | bmit.  |  |

| 🚟 Mon                    | etra Installer   | × |
|--------------------------|--|---|
| •                        | Monetra Installer/Updater has been installed. Please run it to install additional programs |   |
|                          | <u> </u>   |   |
|                          |  |   |
| Step 5: After a short in | stallation routine is run, you should see the following message.                           |   |

#### 3.4.2 Install Remaining Software

Once the Monetra Installer has been setup on your system, you may now run it to install all other Main Street software.

Note: You will need one of the following to proceed:

a) For a live install, you will need the credentials (email and passcode) that were assigned to you by a Main Street partner or associate.

b) For an offline install, you will need the appropriate package file which can be downloaded from the client section of our website.

**Note:** If this is your first time installing, and you have a package of software products, the installer might prompt you to install all XX number of products.

Step 1: Run the Monetra Installer by navigating to the programs folder:

START-->Programs-->Monetra-->Monetra Installer

|           | Monetra Installer v1.0.8   |
|-----------|--|
| M. M.     | http://www.monetra.com/  |
| softworks | Copyright (c) 1999-2006  |
|           | Welcome to the Monetra Installer   |
|           | This application will guide you through the necessary steps to install<br>the software for which you are currently licensed. |
|           | Please contact <support@monetra.com> for support with this process.</support@monetra.com>                                    |
|           |  |
| Exit      | << Prev Next >>  |
|           |  |

| 🕮 Monetra Installer                       |  |  |
|---|--|--|
|   | Monetra Installer v1.0.8   |  |
|   | http://www.monetra.com/  |  |
| Main Street<br>s of t works               | S Copyright (c) 1999-2006  |  |
|   | Client Login   |  |
|   | Email: rayna@monetra.com   |  |
|   | Passworu:  |  |
|   |  |  |
|   |  |  |
| Exit                                      | << Prev Next >>  |  |
|   |  |  |
| Step 2a: If you are performing a 'Live    | ' install, enter your email address and pass code, then choose the |  |
| 'Next' button.                            |  |  |
|   |  |  |
| Step 2b: If you are installing 'offline', | choose the 'Have Disk' button.                                     |  |
| Note: You must have already downlo        | aded the appropriate package/files to proceed.                     |  |

🖑 Monetra Installer -9 4 2% 9 Reinstall Uninstall Transfer Info Install Upgrade Update License ID Product os Туре Status Ver Inst Latest Ver Inst Cnt 9496 Monetra Payment Engine windows-x86 Real Installed 5.4.0 5.4.0 (beta) 1 9497 Monetra Payment C 🚟 Monetra Installer 1.0.5 1.0.6 (beta) 1 9498 Monetra Client 2.0.1 2.0.1 0 There are 4 programs ready to be installed. Would you like to install all of them now? ? Monetra Administrat 2.0.1 2.0.1 (beta) 0 9499 (note: this will use the default installation paths for each one, and install the most recent versions) 9500 Monetra Manager 2.0.1 2.0.1 (beta) 1 Monetra Installer No 1.0.8 1.0.8 9501 0 Yes Exit << Prev Next >> Step 3: If this is an initial/fresh install, you can choose to install all programs or simply highlight the appropriate software product and choose the 'Install' button.

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|---|
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|   |
|   |

|   | 🖑 Monetra Installer                | ×            |
|---|------------------------------------|--------------|
|   | 6 Programs installed succes        | sfully!      |
|   | ОК                                 |              |
| Step 5: Upon successful ins                             | tallation you should see the follo | wing dialo   |
| At this point the Monetra Pay<br>initial configuration. | ment Engine (and associated ut     | ilities) sho |
| Please reference the Monetr                             | a Configuration Guide for more of  | letails.     |

# 4 Upgrading

#### 4.1 Upgrading Monetra from a Pre 5.x series

If you are running a 2.0 or 2.1 series you must first upgrade to 2.1.3 for proper export.

If you are running a 2.5 series you must first upgrade to 2.5.6 for proper export.

If you are running a 3.0 series you must first upgrade to 3.0.1 for proper export.

If you are running a version prior to 6.2.3, you must first upgrade to 6.2.3 for proper export.

All versions released after 3.0.1 can properly export application data into 6.2.3, later versions of Monetra cannot accept this format so 6.2.3 is an intermediate necessary hop.

- Step 1. Settle all transactions.
- Step 2. Export data
- Step 3. Stop Monetra
- Step 4. (optional) Back Up Monetra directories.
- Step 5. Move previous Monetra/MCVE *mv /usr/local/*{monetra|mcve} */usr/local/*{monetra|mcve}-old *mv /etc/*{monetra|mcve} */etc/*{monetra|mcve}-old
- Step 6. Install Monetra 6.2.3 via the Monetra Installer utility
- Step 7. Verify configuration settings (/etc/\*.conf)
- Step 8. Import Data

If you have questions regarding upgrading your current software then please contact us via <a href="mailto:support@mainstreetsoftworks.com">support@mainstreetsoftworks.com</a>.

#### 4.2 Upgrading Monetra 7.x series

This procedure describes upgrading software via the Monetra Installer Utility using an internet connection.

If you are upgrading from a release between 5.0 and 6.2.2, you must first upgrade to 6.2.3 before you can upgrade to Monetra v7.

If you need to upgrade outside of the installer utility, or download a package file then please contact <a href="mailto:support@monetra.com">support@monetra.com</a>

#### 4.2.1 Settle any outstanding authorizations

We cannot guarantee that transactions authorized on one version of Monetra can be settled into a newer version of Monetra, so any outstanding authorizations should first be settled before beginning an upgrade.

#### 4.2.2 Back up existing data

Prior to beginning any upgrade procedure, you should first back up your existing data just incase something goes wrong. On windows, that would be the contents of:

C:\Program Files\Main Street Softworks\

on Linux/Unix/MacOSX, that would be the contents of

/usr/local/monetra and /etc/monetra

#### 4.2.3 Run the Monetra Installer

The first step is to run the Monetra Installer, and log in via the supplied credentials (email, pwd)

| Install    | Reinstall Uninstall       | <b>U</b> pgrade | Updat | e Transfer        | Jinfo    |              |          |
|------------|---------------------------|-----------------|-------|-------------------|----------|--------------|----------|
| License ID | Product                   | OS              | Туре  | Status            | Ver Inst | Latest Ver   | Inst Cnt |
| 9496       | Monetra Payment Engine    | windows-x86     | Real  | Installed         | 5.4.0    | 5.4.0 (beta) | 1        |
| 9497       | Monetra Payment Connector | windows-x86     | Real  | Upgrade Available | 1.0.5    | 1.0.6 (beta) | 1        |
| 9498       | Monetra Client            | windows-x86     | Real  | Installed         | 2.0.1    | 2.0.1        | 0        |
| 9499       | Monetra Administrator     | windows-x86     | Real  | Installed         | 2.0.1    | 2.0.1 (beta) | 0        |
| 9500       | Monetra Manager           | windows-x86     | Real  | Installed         | 2.0.1    | 2.0.1 (beta) | 1        |
| 9501       | Monetra Installer         | windows-x86     | Real  | Installed         | 1.0.8    | 1.0.8        | 0        |
| Exit       |                           |                 |       |                   |          | << Prev      | Next >>  |

**Step 1:** When inside the Installer Main View, Select the software product you would like to upgrade by Highlighting the row. Note: If there is new software available, it will be noted in the STATUS column.

|                               |                                  | staller  |   |        |                   |  |              |             |
|-------------------------------|----------------------------------|--|---|--------|-------------------|--|--------------|-------------|
|                               | Install                          | Reinstall Uninstall  | <b>D</b> pgrade   | Updat  | e Transfer        | Jon State St |              |             |
|                               | License ID                       | Product  | OS  | Туре   | Status            | Ver Inst   | Latest Ver   | Inst Cnt    |
|                               | 9496                             | Monetra Payment Engine   | windows-x86   | Real   | Installed         | 5.4.0  | 5.4.0 (beta) | 1           |
|                               | 9497                             | Monetra Payment Connector                                      | windows-x86   | Real   | Upgrade Available | 1.0.5  | 1.0.6 (beta) | 1           |
|                               | 9498                             | Monetra Client   | windows-x86   | Real   | Installed         | 2.0.1  | 2.0.1        | 0           |
|                               | 9499                             | Monetra Administrator  | windows-x86   | Real   | Installed         | 2.0.1  | 2.0.1 (beta) | 0           |
|                               | 9500                             | Monetra Manager  | windows-x86   | Real   | Installed         | 2.0.1  | 2.0.1 (beta) | 1           |
|                               | 9501                             | Monetra Installer  | windows-x86   | Real   | Installed         | 1.0.8  | 1.0.8        | 0           |
|                               |                                  |  |   |        |                   |  |              |             |
|                               |                                  |  |   |        |                   |  |              |             |
| Click<br>A dia<br>ns, yo      | k on the<br>alog box<br>ou shoul | Upgrade button.<br>will prompt, asking<br>d leave this as defa | g for the ve<br>aulted).                                | ersion | you would lil     | ke to u  | ograde to    | ) (note: in |
| : Clicl<br>: A dia<br>ons, yo | k on the<br>alog box<br>ou shoul | Upgrade button.<br>will prompt, asking<br>d leave this as defa | g for the ve<br>aulted).<br>Versions<br>vailable Versio | ersion | you would lil     | ke to u  | ograde to    | (note: in   |
| Clicl<br>A dia<br>ns, yo      | k on the<br>alog box<br>ou shoul | Upgrade button.<br>will prompt, asking<br>d leave this as defa | g for the ve<br>aulted).<br>Versions<br>wailable Versio | ersion | you would li      | ke to u<br>⊻   | ograde to    | (note: in   |

### **5 Uninstallation**

This procedure assumes you used the Monetra Installer utility to install all software packages. If at any time you have questions regarding un-installation of our software products, then please contact support@monetra.com

#### 5.1.1 Run the Monetra Installer

The first step is to run the Monetra Installer, and log in via the supplied credentials (email, pwd)

|  | Monetra In |                           |                 |        |                   |          |              |          |  |  |  |
|--|------------|---------------------------|-----------------|--------|-------------------|----------|--------------|----------|--|--|--|
|  | Install    | Reinstall Uninstall       | <b>U</b> pgrade | Update | e Transfer        | Info     |              |          |  |  |  |
|  | License ID | Product                   | OS              | Туре   | Status            | Ver Inst | Latest Ver   | Inst Cnt |  |  |  |
|  | 9496       | Monetra Payment Engine    | windows-x86     | Real   | Installed         | 5.4.0    | 5.4.0 (beta) | 1        |  |  |  |
|  | 9497       | Monetra Payment Connector | windows-x86     | Real   | Upgrade Available | 1.0.5    | 1.0.6 (beta) | 1        |  |  |  |
|  | 9498       | Monetra Client            | windows-x86     | Real   | Installed         | 2.0.1    | 2.0.1        | 0        |  |  |  |
|  | 9499       | Monetra Administrator     | windows-x86     | Real   | Installed         | 2.0.1    | 2.0.1 (beta) | 0        |  |  |  |
|  | 9500       | Monetra Manager           | windows-x86     | Real   | Installed         | 2.0.1    | 2.0.1 (beta) | 1        |  |  |  |
|  | 9501       | Monetra Installer         | windows-x86     | Real   | Installed         | 1.0.8    | 1.0.8        | 0        |  |  |  |
| (  | Exit       |                           |                 |        |                   |          | << Prev      | Next >>  |  |  |  |
| <ul> <li>Step 1: When inside the Installer Main View, select the software product you would like to Un-Install by Highlighting the row. Note: You can verify it is installed by reviewing the STATUS column.</li> <li>Step 2: Click on the Un-install button.</li> </ul> |            |                           |                 |        |                   |          |              |          |  |  |  |
| Step 3: A dialog box will prompt, asking if you are sure you want to un-install the software product.  |            |                           |                 |        |                   |          |              |          |  |  |  |
|  |            |                           |                 |        |                   |          |              |          |  |  |  |
| To completely un-install click on the Yes button.  |            |                           |                 |        |                   |          |              |          |  |  |  |