EMS-Server Lite User Guide
V2.00

Introduction

EMS Server (Lite) provides an add-on management system to the Ingenico PC-EFTPOS Integrated EFTPOS system.

The EMS Server system comprises of the following modules:
1. The EMS-Client that is installed on every POS system. This application connects to an EMS-Server, and provides the ability to upload data, as well as act upon remote commands such as configuration, and logon. This client will store transactions that occur whilst the server is offline, and will require no user intervention at all.
2. The EMS-Server (Lite) is installed in one location within the store, and provides a central database for all of the transactions that are performed within the POS systems.

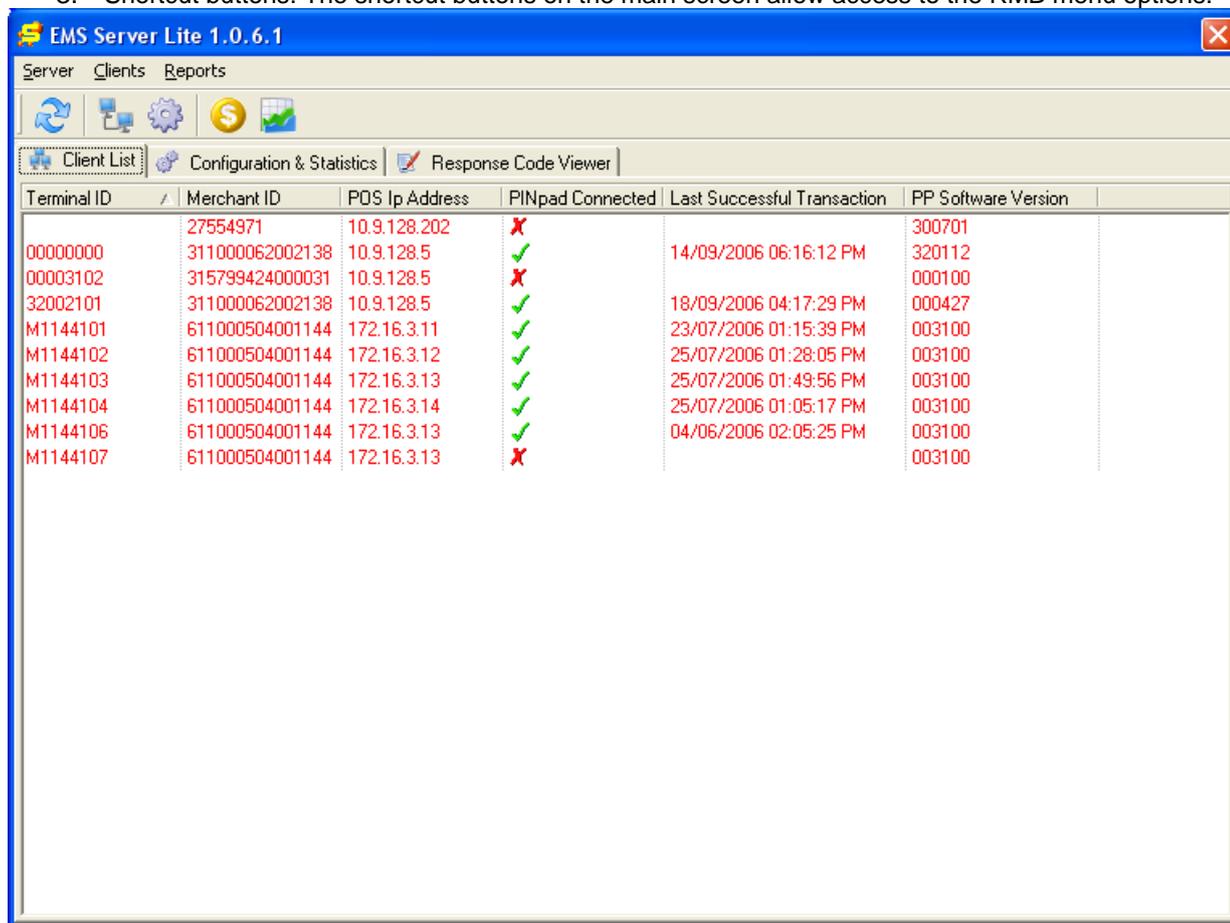The EMS-Server (Lite) has the following functionality:
1. Central Database. An Access database provides a central location to store all store configuration, and transactions from the POS systems.
2. Remote Configuration. A user interface allows for the remote configuration of the EFT-client, and EMS-Clients of the POS systems that are connected to the EMS-Server.
3. Remote Logon and Settlement. The pinpad at a POS can be instructed to perform a logon, or settlement remotely from the EMS-Server.
4. Transaction Reporting. The EMS-Server provides a detailed analysis of all transactions performed on a terminal, as well as an SQL like search engine on transactions.
5. Reports. Customisable reports are available from the system that cater for transaction summary, detailed transaction list, settlement reports and terminal reports.
6. Graphs. Transaction data can be presented graphically which allows for a quick overview of trends in the terminal or store.
7. Software Download. The EMS-Server allows for updated EFTPOS software to be downloaded to the POS, and installed on the POS.

Client List Screen

The EMS-Server(Lite) operates on a per merchant basis. This means that all of the operations that the system can perform are based upon a merchant (or Client terminal). To select a terminal to perform a function on, click on the appropriate terminal in the list box of the main EMS-Server screen.

After a terminal has been selected, operations can be performed on the terminal by any of the following methods:

1. Right Mouse button click. Click the RMB will present you with a menu with the options for that terminal displayed.
2. Drop-down menu. The drop down menu allows access to the functions available from the RMB menu.
3. Shortcut buttons. The shortcut buttons on the main screen allow access to the RMB menu options.

EMS Server Lite 1.0.6.1

Server   Clients   Reports

Client List | Configuration & Statistics | Response Code Viewer

Terminal ID	Merchant ID	POS Ip Address	PINpad Connected	Last Successful Transaction	PP Software Version
	27554971	10.9.128.202	✗		300701
00000000	311000062002138	10.9.128.5	✓	14/09/2006 06:16:12 PM	320112
00003102	315799424000031	10.9.128.5	✗		000100
32002101	311000062002138	10.9.128.5	✓	18/09/2006 04:17:29 PM	000427
M1144101	611000504001144	172.16.3.11	✓	23/07/2006 01:15:39 PM	003100
M1144102	611000504001144	172.16.3.12	✓	25/07/2006 01:28:05 PM	003100
M1144103	611000504001144	172.16.3.13	✓	25/07/2006 01:49:56 PM	003100
M1144104	611000504001144	172.16.3.14	✓	25/07/2006 01:05:17 PM	003100
M1144106	611000504001144	172.16.3.13	✓	04/06/2006 02:05:25 PM	003100
M1144107	611000504001144	172.16.3.13	✗		003100

Configuration Screen

You can set the EMS-Server configuration options from this tab. Most options can be left as default. You may need to change the printer used if you wish to use something other than the default printer.

Client Configuration

- The port that the EMS-client machines connect to is defined here. The default is 2010. It is recommend to leave this as the default.

Database Setup

- The Access database that the EMS-Server (Lite) uses is defined here. The default location is the installation directory. It is recommended that the default directory be maintained.
- The maximum size of the database is 2Gb.
- You can also configure a backup\compact on the database

Statistics

- The statistics provide an overview of the number of clients currently connected, and the number of message that have been sent between the server and the clients.

Printer

- You can set the default printer used by the reports here.
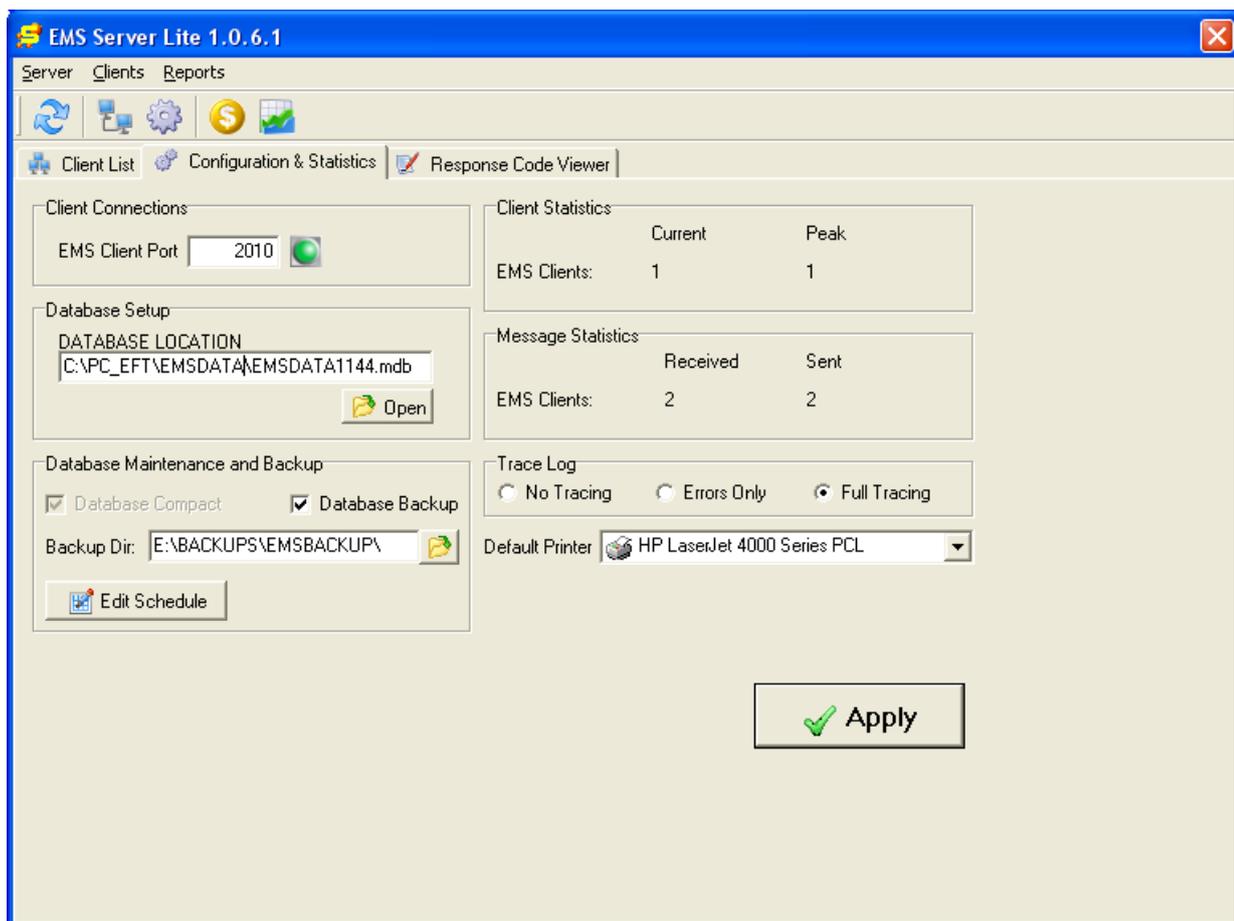
Response Code Viewer Screen

You can view the response codes from this tab. A full list of response codes is available in the PC-EFTPOS Quick Reference Guide for your bank.
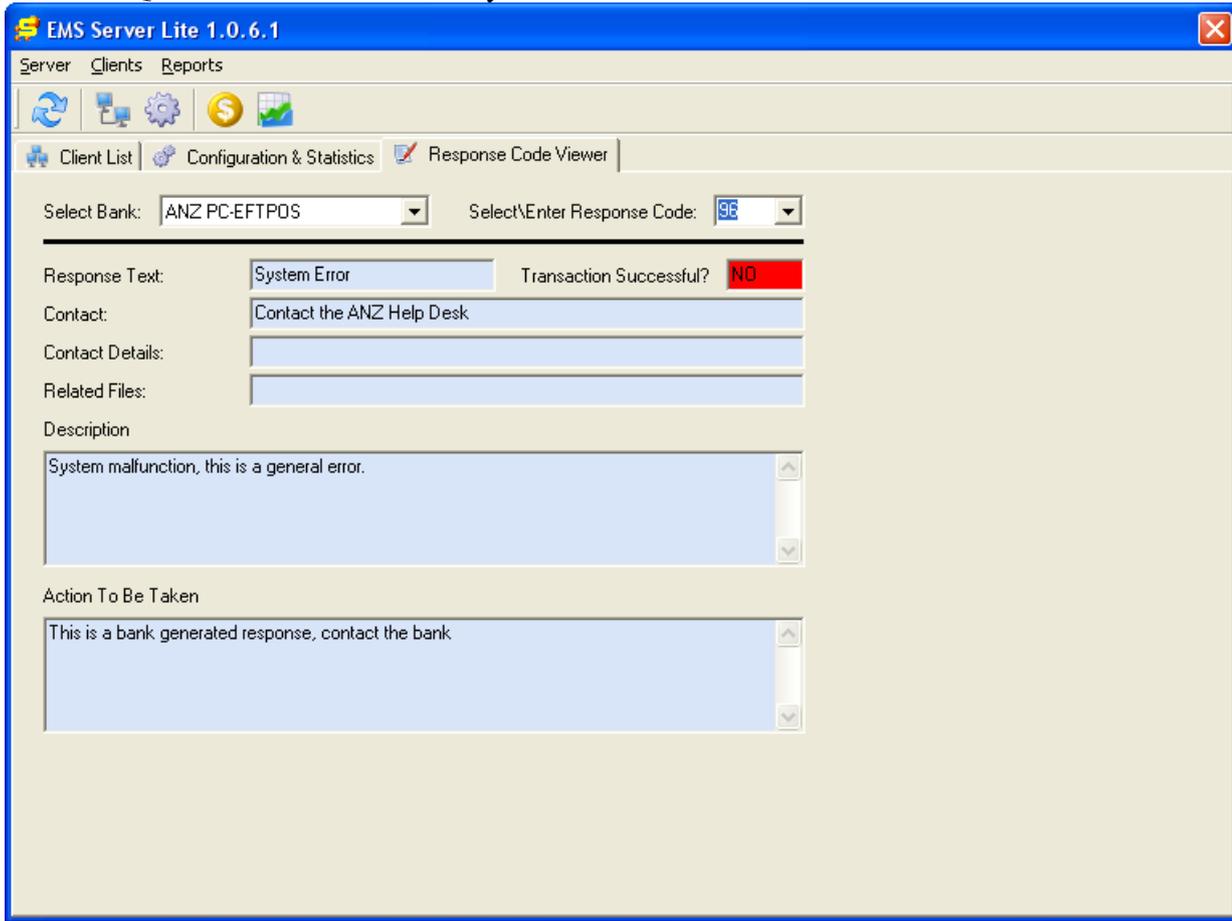
Terminal Functionality

The following functionality is available in the EMS-Server (Lite) by selecting the terminal, and pressing the appropriate function via RMB, menu, or shortcut buttons:

Terminal Logon
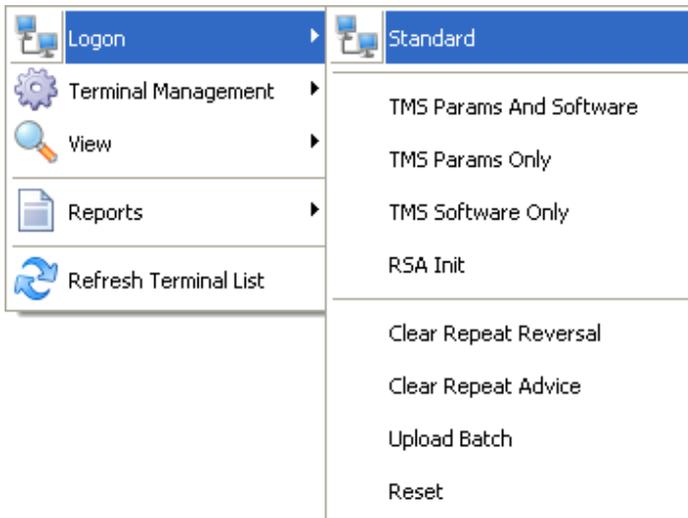
- The EMS-Server (Lite) allows for remote logon of a selected terminal. The "Standard" logon is supported by all terminals. The other logon types are only supported by selected terminals.
- The user will not see a logon screen or a receipt. The standard logon screen is displayed on the pinpad.
- WARNING: The logon will be performed on the POS system, and will interrupt the user.

Terminal Management
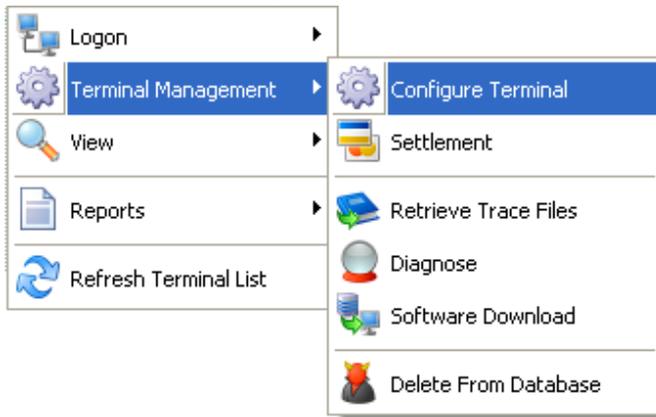
Configure Terminal

Configure the terminal and merchant ID in the pinpad as well as configure the EMS-Client and EFT-Client on the register.

Settlement

Perform a settlement on the terminal. This will be performed on the POS and may interupt the user. Not all settlement options are supported by all banks.

Retrieve Trace Files

Download a compressed archive of PC-EFTPOS trace files from the POS system. This may take a few minutes to complete.
Once the files have been uploaded to the EMS-Server you have the option of sending them to PC-EFTPOS.

Diagnose

Perform a diagnostics test on the lane.

Software Download

Download software to the lane. This option shouldn't be used without help from PC-EFTPOS support.

Delete From Database

WARNING: This option will permanantly remove this terminal ID and all transactions accociated with this terminal from the database. You should only select this option if you are sure you want to delete all transaction records for this terminal.

Terminal Graph and Transaction View
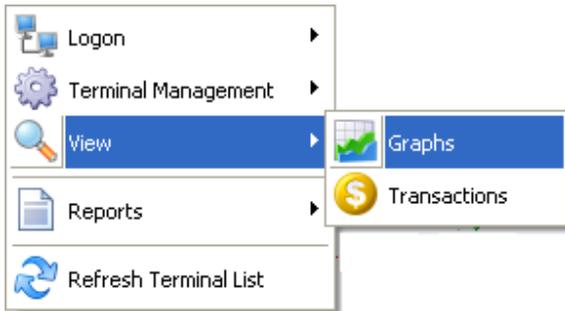
Graphs

View, print and save graphs for the selected terminal. If you would like to view graphs for all terminals select "ALL" from the "Graph By" list on the left.
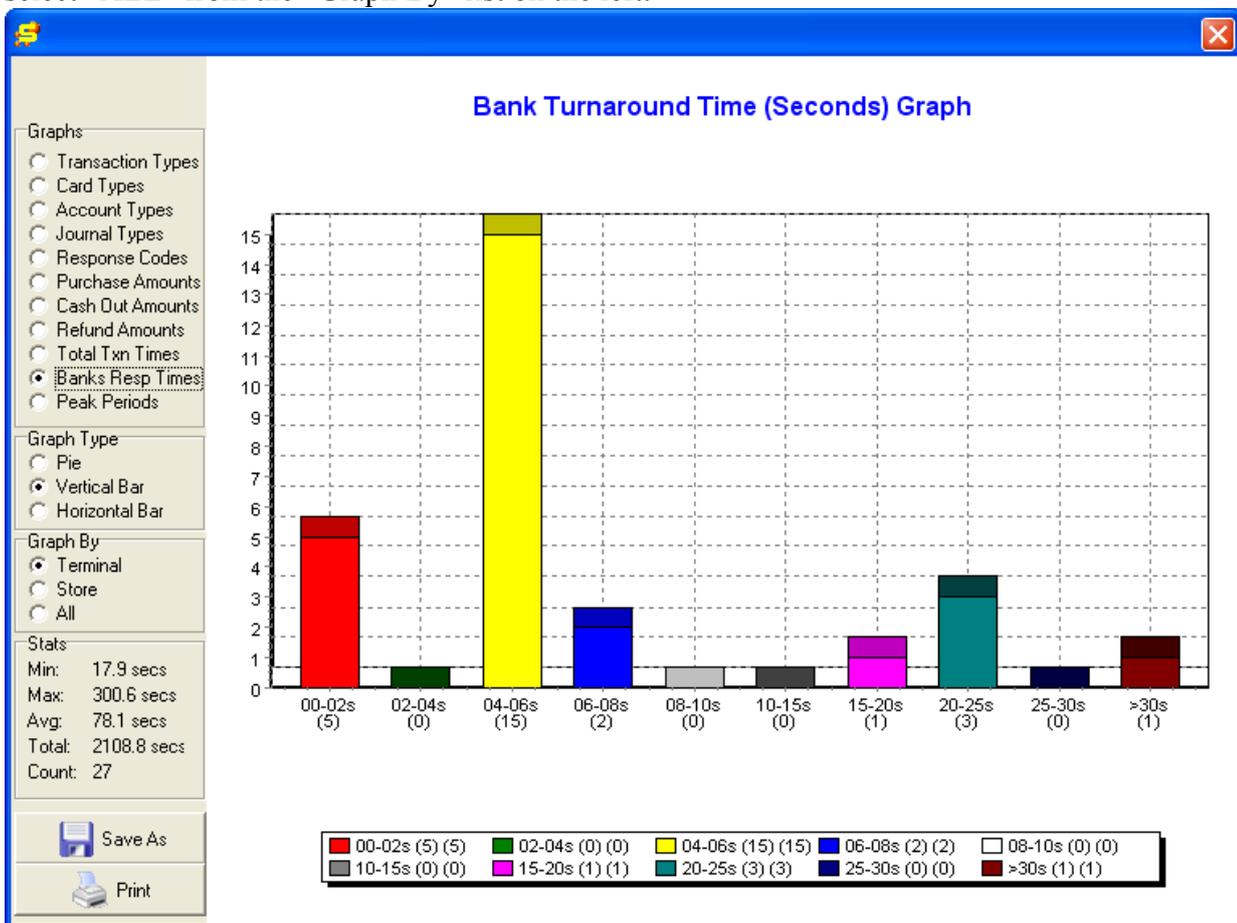
Transactions

- You can set various filter options. Be careful when selecting large transaction ranges (i.e. all transactions for this year) as it may take a few minutes to display.
- Click on the "Search and Display Transactions" button to apply the filter.
- Select one or many transactions in the transaction list and right click to print a summary/detailed report or to print a duplicate receipt.
- Click on "Hide\Show Search Criteria" to view the transaction list full page.
- Click on "Export" to export the current transaction list to a CSV file.
- Click on "Terminal List" to go back to the main EMS-Server page.

Reports

Terminal Configuration Report

- A one page overview of the selected terminal.
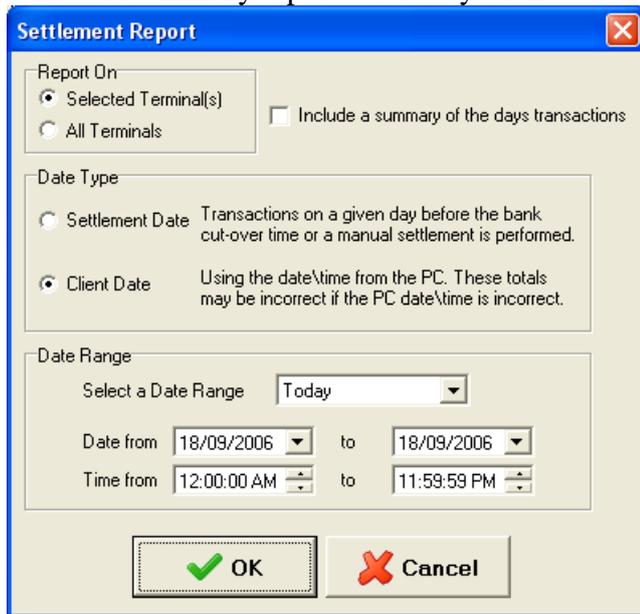
Settlement Report

- A one page settlement report for all terminals for a given day.
- This report can be based on the settlement date or client date.
- A summary report of the days transactions can also be printed.

Settlement Slip

- A receipt style settlement report for the selected terminal or all terminals in a given date range.
- This report can be based on the settlement date or client date.
- A summary report of the days transactions can also be printed.
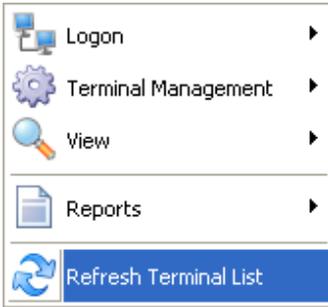

Last Financial Txn

- A detailed transaction report of the last financial transaction performed on the terminal. This is usuful for diagnostics.

## Last Financial Txn (Duplicate Receipt)

- A duplicate receipt of the last financial transaction performed on the terminal. This is useful for diagnostics.

Refresh Client List

- The client list on the EMS-Server (Lite) is maintained in the database. This list will not refresh automatically as it would consume too much processor time. To refresh the list, press the refresh button, and the list box will update itself to contain a current list of connected terminals.
- If a terminal is connected, it will be in black. If it is not currently connected, the terminal will be displayed in red.
- The tick or cross in the "PINpad Connected" column indicates the last know status of the pinpad. For example it is possible to have an EMS-Client that is not connected and a tick in the "PINpad Connected" column because the EMS-Server will display the last know status of the PINpad before the EMS-Client was disconnected.

Checking for Updates
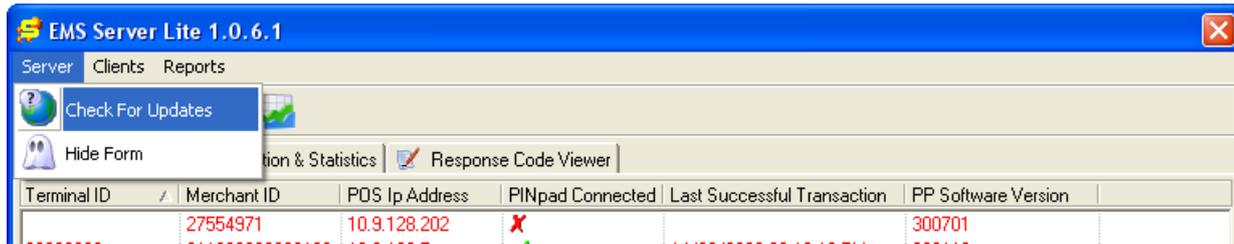
Selecting the "Check for Updates" button allows you to check the PC-EFTPOS website for updates to the EMS-Server software. You will need an active internet connection to perform this action. The EMS-Server checks for the current version in one of the following registry keys:

```
HKEY_LOCAL_MACHINE\Ingenico\EMS\EMS-SERVER\INSTALLERVERSION.
HKEY_CURRENT_USER\Ingenico\EMS\EMS-SERVER\INSTALLERVERSION.
```

If you have the current version the dialog will display that you don't need to update.
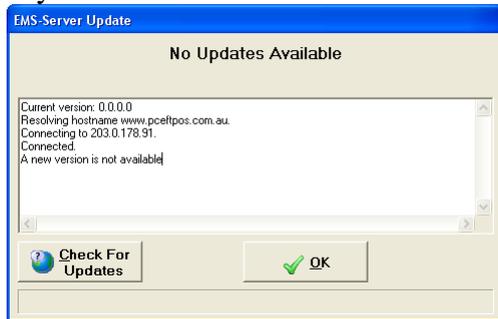
If a new version is available you will be given the option to download it. Clicking on the "Yes" button will start the download.
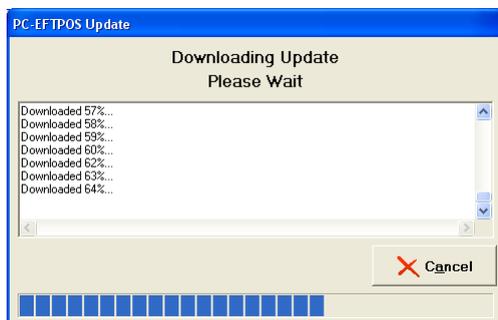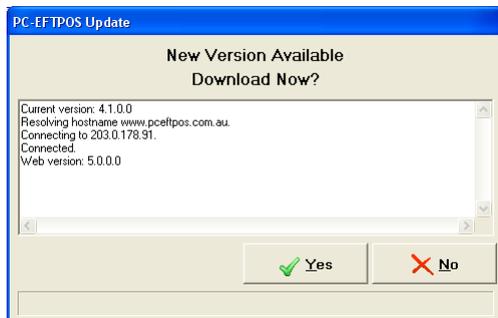
If the download completes successfully you'll be given the option to run the update. Clicking on the "Yes" button will run this update. The will close the EMS-Server.