



# Operator Tips for Getting Started with Your PremiSys ID Pro System



**IDenticard**<sup>®</sup>  
SYSTEMS





**Preface:** PremiSys ID software is a security and badging package developed to provide customers with a critical tool for enhancing the security of staff, property, and information. The system uses an SQL database to store the information that you deem important for your organization, including photos and signatures, and the software facilitates the capturing of that information, the ability to retrieve it, display it and to print it. A comprehensive context-sensitive Help file within the software provides instructions with graphics on all phases of the software.

**Prepare:** In preparation for using your software, you should:

- Install the software and set up the camera and printer following the guidelines that accompany your order. Call IDenticard® Technical Support if you have questions during installation and set up.
- Have a good idea (or list) of the data fields you would like to use. (Remember that you can use PremiSys ID to store and display more information than just the information that you will print onto the ID cards.)
- Have a good idea of how you want your screen to look.
- Have a clear idea of how you want your badge designs to look.
- Have a clear idea of any certification bitmaps that would be useful to display on those badge designs based on field criteria.
- Have on hand any bar code or magnetic stripe information that the system will be enabling.
- Decide who should have rights to the system and decide what sets of rights all of the system users should have.

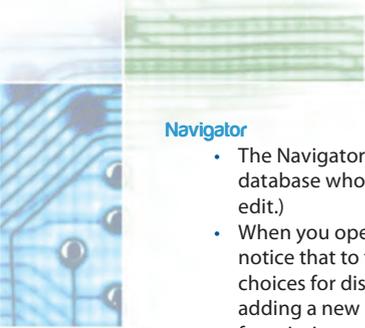
**Proceed:** PremiSys ID and PremiSys ID Pro software arrive at your door with an SQL populated database, sample screens, some basic card designs and logic. You will want to make changes to the fields, screens, card designs, logic and security rights so that the software is customized to your specific needs. The following tips are designed to provide a sensible flow for making those changes. For comprehensive and detailed instructions on any/all facets of the software, use the on-line Help that provides graphically presented step-by-step instructions.

#### **Log In to PremiSys ID Pro**

- Double click on the “PremiSys” icon on your desktop.
- The User Name on a new system will automatically populate as Admin.
- Enter Badge1 as the password.

#### **Observe the Options in the Main Menu**

- Click on the Tasks, Tools, Window and Help options so that you can see the functions of each.
- Hold the mouse over the icons so that you can see the functions of each.

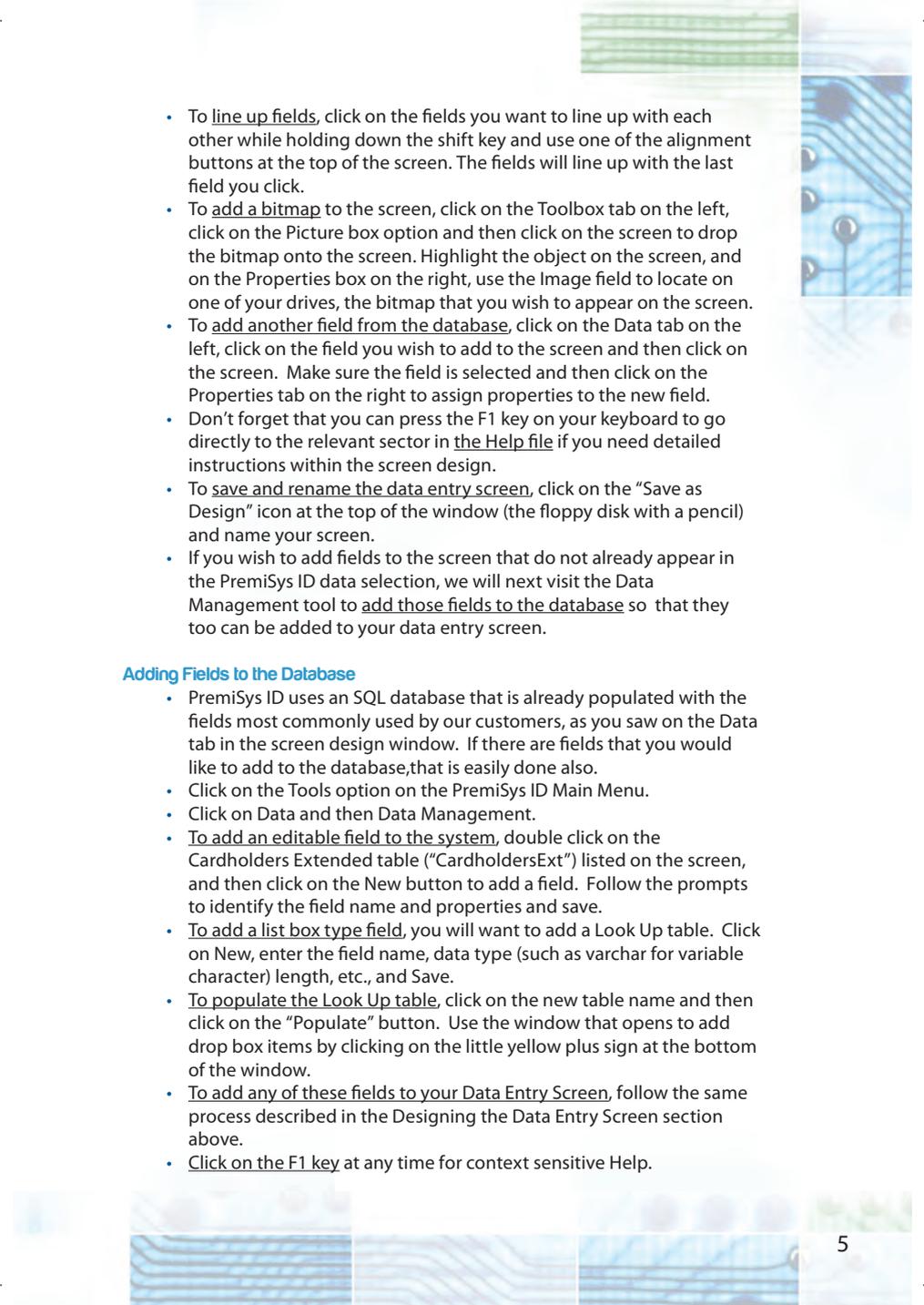


## Navigator

- The Navigator is the tool that you use to find and select people in the database whose information you wish to display (to view, print or edit.)
- When you open the Navigator (double click on the “people” icon notice that to the right you will see: a drop down box with different choices for displaying the information in the Navigator, an icon for adding a new person to the system, an icon for searching and an icon for printing.
- Right click on a person’s name and you will see a choice of screens (Health Care, Industry, Education, Recreation) to use to display the data for that person. Take a look at the different data entry screens and make note of the one with the fields that most closely resemble the fields you would like to have in your database. Close the screen so that we can next look at the screen in its design mode, where we can make changes to it.

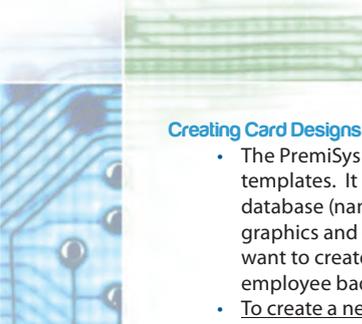
## Designing the Data Entry Screen

- Click on the Tasks option on the Main Menu and then click on Screen Design Home to add, delete or edit the fields that are displayed on the screen and used to collect data to store in the database.
- Highlight the screen design that you noted previously as the one most closely resembling the set of fields that you would like to use (Health Care, Industry, Education, Recreation) and click on Open.
- Notice that in this window:
  - o The middle of the window shows the screen in design mode.
  - o The two tabs on the left, Toolbox and Data, list objects and data that you can add to the screen by clicking on them with the mouse and then clicking on the screen to add them to the screen.
  - o The Properties tab on the right is used to assign properties to a highlighted field on the screen.
  - o The Designers tab on the right is used to copy an existing screen onto a blank new screen.
  - o If you hold the mouse over the icons to the right of the Navigator icon you will see their functions such as saving designs, aligning objects, moving objects from front to back, etc.
- To delete a field that you do not want to use, highlight the field and press the delete key on your keyboard.
- To associate your camera with the photo window, click on the photo window to highlight it, click on the Properties tab on the right and choose the Capture Device (the Nikon cameras use WIA). In the Auto Select field choose “True,” and make sure in the Relation field that the photo window is associated with the Cardholder Photo field.
- To move fields around on the screen, use the mouse to click and drag.

- 
- To line up fields, click on the fields you want to line up with each other while holding down the shift key and use one of the alignment buttons at the top of the screen. The fields will line up with the last field you click.
  - To add a bitmap to the screen, click on the Toolbox tab on the left, click on the Picture box option and then click on the screen to drop the bitmap onto the screen. Highlight the object on the screen, and on the Properties box on the right, use the Image field to locate on one of your drives, the bitmap that you wish to appear on the screen.
  - To add another field from the database, click on the Data tab on the left, click on the field you wish to add to the screen and then click on the screen. Make sure the field is selected and then click on the Properties tab on the right to assign properties to the new field.
  - Don't forget that you can press the F1 key on your keyboard to go directly to the relevant sector in the Help file if you need detailed instructions within the screen design.
  - To save and rename the data entry screen, click on the "Save as Design" icon at the top of the window (the floppy disk with a pencil) and name your screen.
  - If you wish to add fields to the screen that do not already appear in the PremiSys ID data selection, we will next visit the Data Management tool to add those fields to the database so that they too can be added to your data entry screen.

### Adding Fields to the Database

- PremiSys ID uses an SQL database that is already populated with the fields most commonly used by our customers, as you saw on the Data tab in the screen design window. If there are fields that you would like to add to the database, that is easily done also.
- Click on the Tools option on the PremiSys ID Main Menu.
- Click on Data and then Data Management.
- To add an editable field to the system, double click on the Cardholders Extended table ("CardholdersExt") listed on the screen, and then click on the New button to add a field. Follow the prompts to identify the field name and properties and save.
- To add a list box type field, you will want to add a Look Up table. Click on New, enter the field name, data type (such as varchar for variable character) length, etc., and Save.
- To populate the Look Up table, click on the new table name and then click on the "Populate" button. Use the window that opens to add drop box items by clicking on the little yellow plus sign at the bottom of the window.
- To add any of these fields to your Data Entry Screen, follow the same process described in the Designing the Data Entry Screen section above.
- Click on the F1 key at any time for context sensitive Help.



## Creating Card Designs

- The PremiSys ID Card Design tool facilitates the creation of card templates. It allows you to determine what information from the database (names, photos, department photos etc.) along with graphics and verbiage prints on the card and where. You most likely want to create a few different card designs so that, for example, employee badges are distinctly different from volunteer badges.
- To create a new card design click on Tasks on the Main Menu and then on Card Design Home
- In the window that opens, click on the New Design option and make selections from the options that the software displays.
  - o Choose the correct Card Stock. For example, if you are going to print on a high performance card, like the JetPak®, and it is IBM size, you want to choose JetPak IBM for the card stock.
  - o Choose the correct printer from the drop down and click Continue.
  - o Choose between creating a card design for the front of the card or the back of the card. Note: If you are using a dual core Jetpak®, a card in which the front and back of the card are printed like one long card and then folded after printing, you would choose to design a front. The only time you would choose to design a back is when you are designing the back of a card for a PVC card that will be printed using a PVC duplex printer. Click Continue.
  - o The window that opens to create the card design is very much like the Data Entry screen window – the middle of the screen shows the card size, on the left are the Tools and Data tabs and on the right are the Properties and Designer tabs.
  - o You can manipulate the appearance of the card size by using the magnifying glass icons on the top right of your screen. A ruler shows you the actual size of the card.
  - o To add a photo to the card design, click on the Toolbox Tab on the left and choose Photo by clicking and dragging the photo over to the card. While still selected, click on the Properties tab on the right to change the width of the photo to 1" and the height to 1.25" to correspond to the standard photo size used in the U.S. Make sure you click on the Relation property in the Properties box, not the image property, and associate the photo with the correct field in the cardholder database (either Cardholders:photo, or if you are using file share, Cardholders:photoshare). Use the context sensitive help for more information on using file share.
  - o To add a graphic to the card design, click on the Toolbox Tab and drag the Photo object (which also acts as a graphic object) onto the card design. Click on the Properties tab on the right and use the "Image" property this time to locate the graphic file you wish to print.

- o To add data such as employee first names, last names, departments, click on the Data Tab on the left of the screen and click and drag the fields onto the card design. Highlight the field and use the Properties tab on the right to change fonts and colors, etc.
- o To add the first name and last name to the card design, treating them as one entry, click on the Toolbox tab and drag the Compound Label tool onto the card design. This tool will allow you, for example, to group the first name, middle initial and last name together and place them on the card design as if they were one entry. After dragging the compound label to the card, click on the properties box and then the Relation field. A dialog box will open that allows you to build your compound label.
- o To add verbiage, such as back-of-card statements, click on the Toolbox on the left and click and drag the Label tool onto the card design. Highlight it and use the Properties tab on the right to assign properties. Use the Text properties to type the data that you would like to appear on the card.
- o To add a bar code, click on the Toolbox Tab on the left and click and drag the bar code icon onto the card design. In a moment or two a picture of a bar code appears on the card design. Highlight the bar code and use the Properties Tab on the right to assign the bar code characteristics to the card. The symbology and relation builder are especially important fields to enter. When you click on the relation builder in the Properties, there is a window that allows you to “build” your bar code. The bar code string, as it is called, shows at the top of the window as you build the bar code. Use the context sensitive help if you are not confident in providing the bar code properties.
- o Using the Toolbox Tab on the left you will see that you can add squares (which you can click and drag to turn into color bars), lines, ellipses.
- o There are buttons at the top of the screen that you can use for alignment of fields, for moving objects behind or in front of others.
- o You can also use the Bitmap Logic function to cause bitmaps (such as a forklift, a red cross etc.) to be printed onto the cards to represent certification. See the Help screen for assistance with this function.

### Setting Up Badge Logic

- Badge Logic provides the ability to associate a specific badge design with criteria on the Data Entry Screen. For example, you could have a drop box on your screen for Badge Type, and within that drop box have Employee and Visitor as your selections. If you design one badge for employees and a different one for visitors, the software will automatically know to print the employee badges when you have



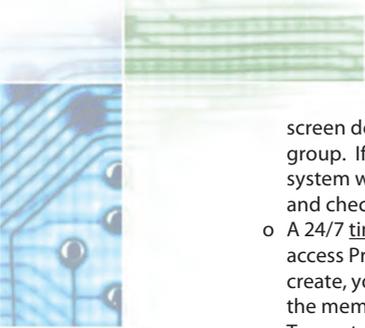
added an employee to your system and identified them as employees in the drop box and to print the visitor badges when you have added a visitor to your system and identified them as visitors in the drop box.

- o Before you can assign Badge Logic you need to:
  - Determine what drop box field on the Data Entry Screen will be used for the badge logic criteria (you can base the logic off of any field, but for practical purposes, usually customers use a field like Badge Type).
  - Make sure you have populated the drop box with the entries, like Employee, Visitor, Contractor, Student, etc. for which you plan to use different badges.
  - Create the badge designs that you want to print for each of those different populations.
- o To Assign Badge Logic click on Tools on the Main Menu and then click on Logic.
- o Click on the Badge Logic option. You will see a sample of badge logic in the window but will wish to create your own logic, so click on New Logic Set on the upper right of the window.
- o Name your logic set. If you are using a field called Badge Type for your logic, you could name the logic set "Badge Type."
- o Click on the Add button on the right to add the first logic statement to the set.
- o Name the first statement. For example, if the first statement is going to tell the system to print the Employee Badge when a person is entered as an employee, then you could name this first statement "Employee."
- o Click on the Card Design drop box and select the right card design.
- o Click on the Add button on the right to add the condition(s) for this first statement. In the drop box where you can select the Database field, scroll to the field you are using for Badge Logic (such as Badge Type). In the Value drop box, type the corresponding entry from your Data Entry screen, for example "Employee." Then click OK and then click OK again.
- o Click on the Add button again to add a second statement in the set (for example if the second statement is going to tell the system to print the Visitor Badge when a person is entered as a visitor). Follow the same steps that you took to add the first statement.
- o When you have finished adding statements, click OK for the last statement and then click "OK" again to accept the new set.
- o The new set of logic needs to be applied to the data entry screen that you are using.
  - Click on Tasks on the Main Menu.
  - Click on Screen Design Home.

- Open the data entry screen that you are using with this logic (remember that you can use more than one data entry screen with PremiSys ID and can assign different, or the same, badge logic to each one).
  - Click on the background area of the screen design.
  - Click on the Properties box and note the location of the Badge Logic field – this shows the name of the logic set currently applied to that screen.
  - Click on the icon that looks like flow-chart boxes on the Toolbar to open the window that shows existing logic sets.
  - Select the new logic set and click the OK button and then save your screen design.
  - Save the screen design and close the window.
- o Test your new Badge Logic by going to your Data Entry Screen and opening one of your records. If you used Badge Type as the drop down for your Logic, make sure you have selected a badge type for this employee. Click on the Preview button on the Toolbar (the Preview button is the second icon from the far right). If the correct badge displays, you know you have set up your Badge Logic correctly. If not, read over the directions on the Help screen and double-check your work.

#### Setting Up User Rights and Carholder Filtering

- PremiSys ID User Rights are set up to allow your organization to create sets of rights for groups of staff (for example, a set of rights for system administrators and a smaller set for operators) and then to add system users and assign them to groups. This approach helps streamline and manage the process of assigning rights. Make sure that you **never delete the default Admin group before you set up a new group that has ALL rights!**
  - o Click on Tasks on the Main menu.
  - o Click on Security Administration.
  - o Click on the Groups tab. You will see the default Admin group that is already set up in your system.
  - o Add a new Group that has rights to ALL functions of the software by clicking on Add at the bottom left of the window.
  - o Name the group (example: Full Administration) and assign this group all rights by clicking every check box for every top-level right in the list. Click the plus sign beside each top-level right to double-check that all the “subrights” are also checked. Note that some of the subrights have subrights under them that should be checked as well.
  - o The membership tab will list the users in the system. Check the names of only those users you want to assign to this Group after you set it up.
  - o Click the Screen Designs tab and check the names of the Data Entry screens you want to be available to the group. (New



screen designs do not automatically become available to a group. If you create a new screen design you must “tell” the system what group has use of that screen by opening the Group and checking the name of the new screen design.

- o A 24/7 time period during which members of this group can access PremiSys ID is automatically set. For other groups you create, you may wish to create other time periods to limit when the members of those groups have access to the software.
- o To create a set of rights for another group, such as daytime operators, for example, follow these same steps, giving the group the name Operator. Instead of giving the Operator group all of the rights, select each right that you want that group to have by checking the check box beside the name of the right. Choose the Screen Layout tab and give this group rights to the screen(s) you wish by checking the name of the screen(s). Click OK.
- o To add users to the system click on the Users tab and then click on Add in the bottom left of the window. Enter the name, password and e-mail address. (Use the activation options only if you want to give the user a start date and stop date for access to the system). Click on the Group Membership tab and then give that User access to the correct group or groups by checking the boxes beside the names of the groups to assign. Click OK when done.
- o Test Your User Rights by logging off of the system and logging in again with the new user name and password. Again, do not eliminate the groups that came with the system until you have made certain that you have an active and working user name that has access to ALL functions of the software.
- o Click on the F1 key for Help on this topic.
- Assigning a Cardholder Filter to a Group
  - o You can create and apply a cardholder filter to a group to limit the cardholders to which the group has access. For example, if you have two organizations or two locations sharing the database, you can use Cardholder Filtering to ensure that each location or organization has access only to the people in their specific location or organization.
  - o Go to Tasks, then Security Administration and click on the Cardholder Filters tab.
  - o Click on the Add Filter button.
  - o In the filter window that opens, name your filter and enter a description of the filter.
  - o In the first of the four filter selection boxes, click on the drop box to view the fields in your database and select the one you wish to use to determine your filter criteria. For example, if you have a location field and wish to use it for filtering purposes, you would choose the “Location” field.

- o In the second of the four filter selection boxes, choose the appropriate operator, for example "Equals."
- o In the third of the four filter selection boxes enter the specific data that you want the filter to include. For example, if you want to filter so that the operator can see only the employees in one of your locations, type in that specific location. If the field you choose in the first box is a date field, a calendar control appears in this third box. If the field you choose in the first box is a Yes/No field, a drop-down box with a Yes/No drop-down box appears in this third box.
- o You can use the fourth of the four filter selection boxes to add more conditions to your filter. These conditions can be and/or conditions.
- o Click "OK" to save your filter.
- o To apply a filter to a group, click on the Group tab in the User Administration window and double click on the group to which you wish to assign a filter.
- o Place a checkmark in the checkbox of the filter you wish to assign to the group and click on the OK button.
- o To make sure you have created a usable filter, log out of the system and log in as one of the users within the Group to which you applied the filter.

#### To Add a New Person to the Database

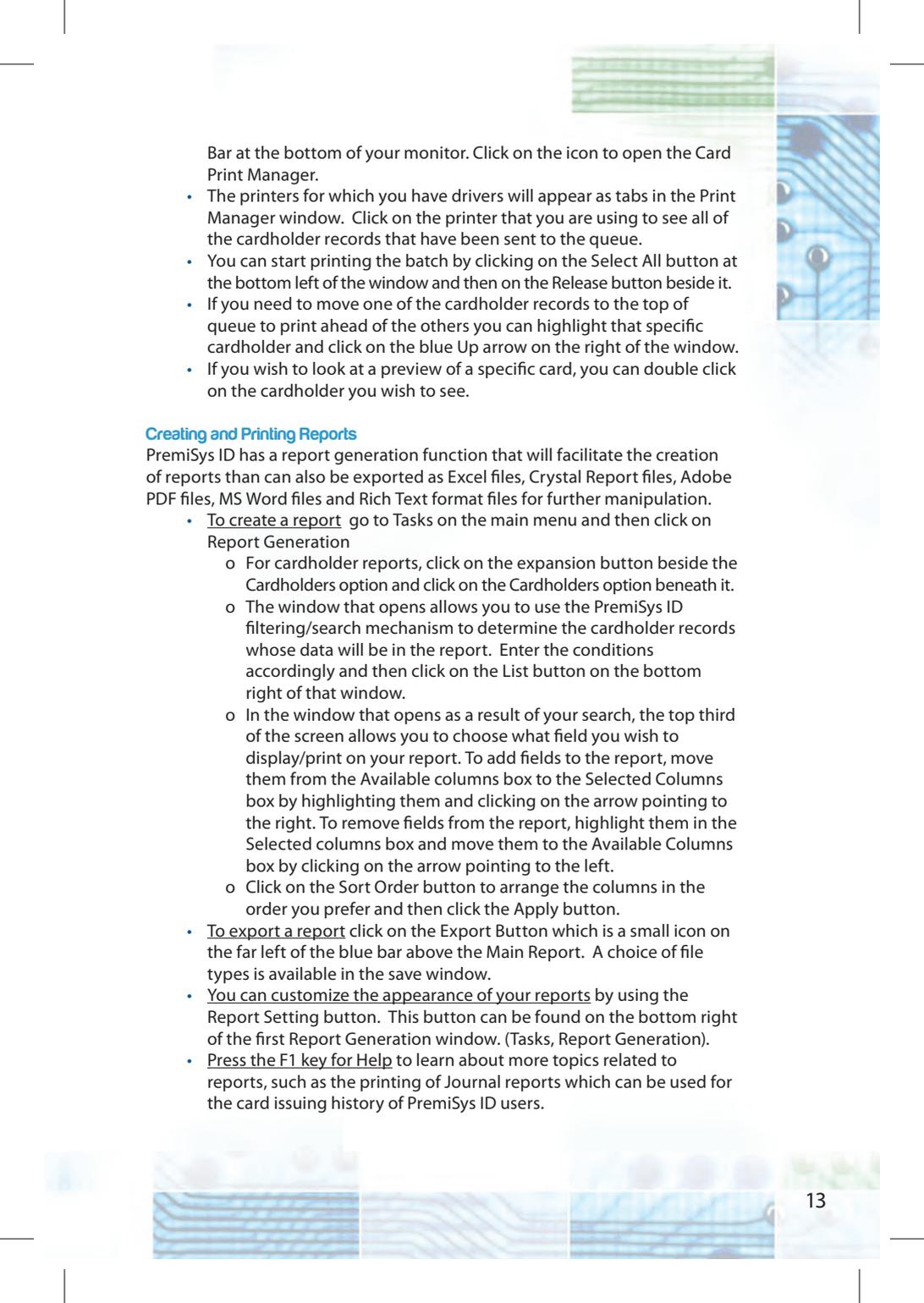
- To add a new person to the database, click on the Navigator icon to open the Navigator and then click on the down arrow beside the icon that looks like a head shot. Choose the Screen that you are going to use and the screen will open to a blank "record" ready for you to add the new person's information.
- If you already have your system open to your Data Entry screen, click on the icon at the top of the screen that looks like a head shot. This will open to a blank "record" ready for you to add the new person's information.
- Enter the information into the fields on the screen.
- To add a photo, make sure your camera is plugged into the USB port and turned on.
- Click on the photo box.
- With your new employee sitting 36" from the camera, and preferably with a backdrop behind him or her, click on the photo box on the Data Entry Screen. This opens the WIA capture window.
- You can first click on the Preview button to make sure that you have lined up your employee correctly. Then to take the picture, click on the Take/Get Picture button. When you have taken the picture, in a few seconds the photo will open into a window that allows you to adjust lighting and color balance. You will see one image with a dotted line around it.

- To crop the picture, adjust the size of the crop box by placing the mouse pointer over the bottom right corner of the box. Click and hold down the left mouse button so that you get a double arrow. Now drag the mouse to size the crop box.
- Once you have the box the size you want it to be you can move the box by clicking and dragging it. When you click OK it will put the photo into the software. You can then save the cardholder record.
- To adjust the light settings on the photo you can click on the show advanced button. Here you will see four tabs: Tone, Color, Effects and Presets. Use the slide bars to adjust the tone and color.
- When the settings look correct, click on the OK button at the bottom of the screen and the photo will be inserted into the new employee's record.
- It is advisable to save two or three light settings to speed up the process of photo adjustment when you are planning to badge groups of people. To do so, adjust the settings for someone with very light coloring and click on the Save button. Name the setting (for example, "Darken"). Adjust the light settings for someone with dark coloring and click on the Save button again, this time naming the setting, perhaps "Lighten." To use the settings in the future, when you take photos of new people, click on the saved settings to make changes rather than using the slide bars.
- Use the F1 key for more information on taking photos and for directions on using the IntelliChrome/Chromakey feature.

### To Batch Print

You can send a batch of cardholder data to the printer to expedite the printing process.

- Open the Navigator (click on the "people" icon) and click on the Search button (looks like a head shot with binoculars).
- Use the four search field windows to enter your search condition and criteria for the cards you wish to print. For example, if you have a field called Badge Type and want to print only the Employee badges, you would choose Badge Type as your condition, then = as your Operator and Employee as the specific criteria.
- Then click the arrow for the "Use search results for" drop-down box at the bottom of the window and select "Print Batch" in the list that opens.
- Click the Search button.
- In the next window you can choose either to use the default screen Badge Logic, which will tell the system to print the card designs based on logic, or you can click the Select Card Design option button, which then allows you to choose a specific card design to use for this printing batch. Click OK.
- The software will look for the results of your search and upon completion of the search will activate the Card Print Manager.
- A Card Print Manager button will appear with a balloon in the Task



Bar at the bottom of your monitor. Click on the icon to open the Card Print Manager.

- The printers for which you have drivers will appear as tabs in the Print Manager window. Click on the printer that you are using to see all of the cardholder records that have been sent to the queue.
- You can start printing the batch by clicking on the Select All button at the bottom left of the window and then on the Release button beside it.
- If you need to move one of the cardholder records to the top of queue to print ahead of the others you can highlight that specific cardholder and click on the blue Up arrow on the right of the window.
- If you wish to look at a preview of a specific card, you can double click on the cardholder you wish to see.

### Creating and Printing Reports

PremiSys ID has a report generation function that will facilitate the creation of reports than can also be exported as Excel files, Crystal Report files, Adobe PDF files, MS Word files and Rich Text format files for further manipulation.

- To create a report go to Tasks on the main menu and then click on Report Generation
  - o For cardholder reports, click on the expansion button beside the Cardholders option and click on the Cardholders option beneath it.
  - o The window that opens allows you to use the PremiSys ID filtering/search mechanism to determine the cardholder records whose data will be in the report. Enter the conditions accordingly and then click on the List button on the bottom right of that window.
  - o In the window that opens as a result of your search, the top third of the screen allows you to choose what field you wish to display/print on your report. To add fields to the report, move them from the Available columns box to the Selected Columns box by highlighting them and clicking on the arrow pointing to the right. To remove fields from the report, highlight them in the Selected columns box and move them to the Available Columns box by clicking on the arrow pointing to the left.
  - o Click on the Sort Order button to arrange the columns in the order you prefer and then click the Apply button.
- To export a report click on the Export Button which is a small icon on the far left of the blue bar above the Main Report. A choice of file types is available in the save window.
- You can customize the appearance of your reports by using the Report Setting button. This button can be found on the bottom right of the first Report Generation window. (Tasks, Report Generation).
- Press the F1 key for Help to learn about more topics related to reports, such as the printing of Journal reports which can be used for the card issuing history of PremiSys ID users.



### Resources for the PremiSys ID Pro System

- This document is designed to be used as an aid for customers who take the standard group training or the custom training.
- For detailed extensive documentation, use the On-Line Help by clicking on the Help button or by clicking on the F1 key for context-sensitive Help for many topics.
- Instructor-led web-based training services are available for your new staff (or for refresher training).
- For technical assistance contact our Technical Support staff. Software Support Agreements can be purchased to provide you with quick, easy and professional assistance following the initial warranty period. Purchase orders can be placed for individual assistance calls also.

- Notes -



**IDenticard**<sup>®</sup>  
SYSTEMS

40 Citation Lane • Lititz, PA 17543

TEL **800.233.0298** • 717.569.5797 • FAX 717.569.2390 • [www.IDenticard.com](http://www.IDenticard.com)