ADMINISTRATORS GUIDE

Episuite 5.5

A quick tutorial on how to set up and implement Episuite® Software

created by

IDentiphoto®

Specialists in IDentification

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ADMINISTRATOR GUIDE

This guide assumes the administrator has a good understanding of the windows environment. This manual will provide you with a general step-by-step guide to setting up the Episuite software. For more detailed help on each module please refer to the online help provided by the software. This manual is based on a local, single user installation.

1. Place the hardware key on LPT port.
2. Insert software disk and install flavor (Lite, Classic, or Pro) that you purchased.
   Follow the screen instructions to complete installation.

The software is installed in the *c:\Program File\Episuite 5.5* directory. The default databases are located in the *c:\Program Files\Episuite 5.5\DB* folder (Episuite.mdb & template.mdb).

All program modules are located under **START**, **PROGRAMS**, Episuite X 5.5 for Windows (X=Lite, Classic, or Pro).

DATABASE FILE CREATION

1. Open **WINDOWS EXPLORER** and browse to *c:\Program Files\Episuite 5.5\DB* folder.
2. Make a copy of the *template.mdb* file
3. Rename *copy of template.mdb* file to the name that you'd like for your database


You have just created a blank database that will store the data used to create ID badges. This database contains a number of default fields. Most users don't need all of these fields and usually need to add their own. This is accomplished using the **GUARDTOOL DATABASE UTILITY** module

GUARD TOOL DATABASE UTILITY

1. Click windows **START** button
2. Select **PROGRAMS**
3. Select **EPISUITE X 5.5 for WINDOWS**
   (X=Lite, Classic, or Pro)
4. Select **GUARDTOOL DATABASE UTILITY**
5. Click the **CHANGE DATABASE** button and browse out and select the database file that you created, click **OPEN**, **OPEN**.
6. Click the **JET DATABASE MODULE** button (**Figure 1** appears)

With this utility you can add fields to the person or card tables (Figure 1-A). The fields that are currently in the table selected are shown in the large white window (Figure 1-H). This is where you add and remove fields from the database just created. Continue adding and deleting fields until you have all the fields you need.

You can also do a repair and compact on the database from here by clicking on the **OPTIMIZE DATABASE** button (Figure 1-B)
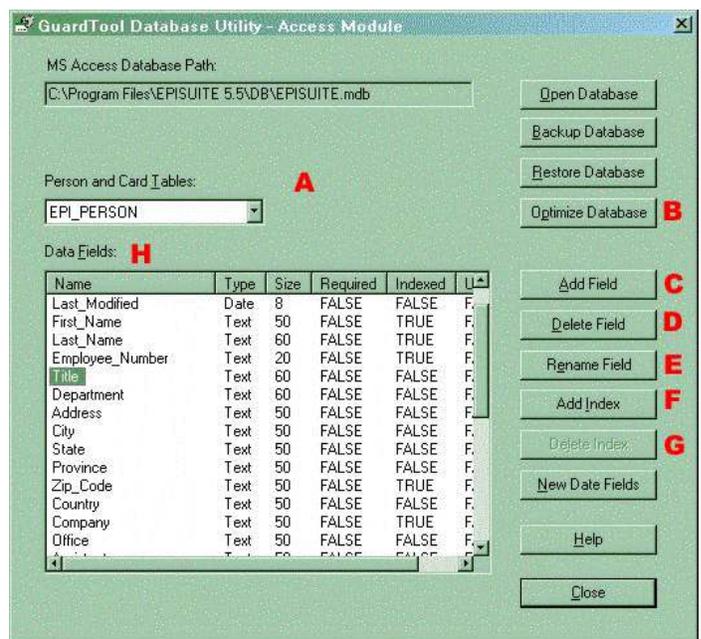
(Figure 1)

ADDING FIELDS

1. Click the **ADD FIELD** button (Figure 1-C)
   (Figure 2 will appear)
2. Type in the name of the field you wish to add
   (Figure 2-A). You can't use spaces.
3. Choose the **FIELD TYPE** (Figure 2-B) by clicking
   the drop down arrow.
4. Check whether you want the field to be **REQUIRED**
   (Figure 2-C).
5. Choose a **FIELD SIZE** (Figure 2-D) for this field
6. Click **OK**..
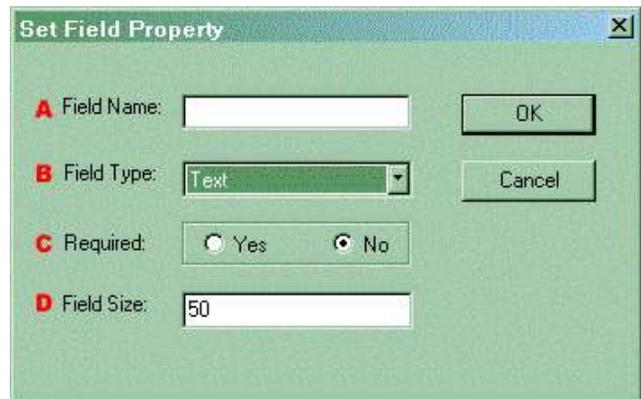
DELETING FIELDS

*** *When deleting a database field you will lose
all data that the field may have contained.* ***

If the field you wish to delete has an **INDEX** attached
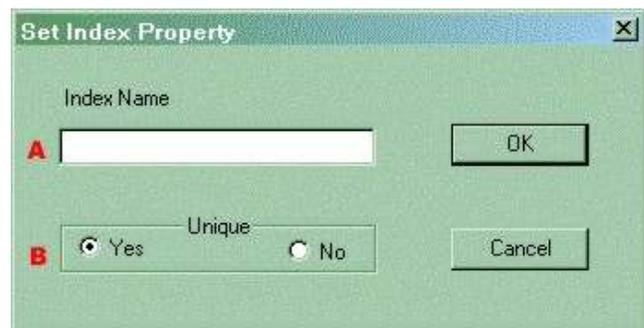to it, you must delete the **INDEX** first.
(See **DELETING INDEXES** below)

1. Click on the field name in the **DATA FIELDS** window
   (Figure 1-H)
2. Click the **DELETE FIELD** button (Figure 1-D)
3. Click **YES** to confirm deletion.

(Figure 2)

ADDING INDEXES

An index helps Microsoft Access find and sort records
faster. You'll want to apply an index to the database fields
on which you will be performing your queries most often.
(Last Name, Employee #, etc..).

You'll also want to apply an index to any field that will be
unique (not duplicated).

1. Click on the field name in the **DATA FIELDS** window
   (Figure 1-H)
2. Click on the **ADD INDEX** button (Figure 1-F)
   Figure 3 will appear
3. Type the **INDEX NAME** (Figure 3-A)
   (No spaces allowed)
4. Check **YES** or **NO** to indicate if the field is **UNIQUE**
   (Figure 3-B)
5. Click **OK**

(Figure 3)

DELETING INDEXES

1. Click on the field name in the **DATA FIELDS** window
   (Figure 1-H)
2. Click the **DELETE INDEX** button (Figure 1-G)
3. Click **YES** to confirm deletion

GUARDDRAW - ID BADGE DESIGN

The GuardDraw module allows you to create ID badge templates. The design capabilities of this module are very limited. For more complex badge designs you will need to use a graphics program like CorelDraw or Adobe Illustrator. With GuardDraw you will be able to add static text fields, dynamic text (database) fields, image fields, logos, barcodes, and set up magnetic stripe encoding information.

GuardDraw can be used to create ID badge templates that will be printed to PVC using a PVC card printer, or to paper or teslin (with multiple badges per sheet) using an inkjet or color laser printer. A unique feature of GuardDraw is that each ID badge template stores all the printer settings used to produce that badge.

This manual will give you a very basic tutorial on how to create ID badge templates. For more detailed information on the features of this module refer to the online help by pressing the **F1 ke**y**.** This tutorial also assumes that you are familiar with the printer you will be using and it's settings.

CONNECTING TO DATABASE

1. Click on **VIEW** menu
2. Select **OPTIONS**
3. Click on **CHANGE DATABASE** button
4. **BROWSE** out and select your database
5. Click **OPEN**, **OPEN**, **OK**

(You will need to connect to the database that you will be designing badges for so that the fields in that database are available to you)

NEW ID BADGE TEMPLATE

1. Click **FILE** menu
2. Select **NEW**

   This will open up the GuardDraw screen with a blank template based on the windows default printer.

3. Click **FILE** menu
4. Select **PRINT**
5. Choose the printer that you will print this ID badge to
6. Click on **PROPERTIES** to set all the printer options that will be needed to print this ID badge
7. Click **OK**
8. Click **CLOSE**
9. Click **FILE** menu
10. Select **PAGE SETUP** (Figure 4)

    (See **PAGE SETUP** for **PVC CARD PRINTER** or **PAPER** or **TESLIN**, depending on which media you'll be using.)
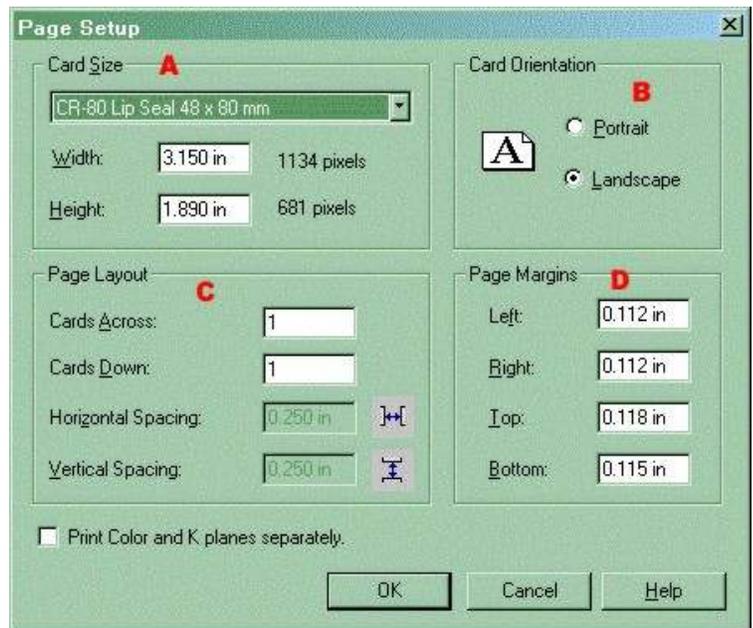
(Figure 4)

PVC CARD PRINTER - Page Setup

1. Click the **CARD SIZE** (Figure 4-A) drop down and choose **FULL PRINTER PAGE**

   Choosing this option pulls the settings for the printer you selected above. The **CARD SIZE** (Figure 4-A) will change to **CR-80 FLUSH CUT** and the **WIDTH & HEIGHT** field values will reflect this card size. The **CARD ORIENTATION** (Figure 4-B) & PAGE MARGINS (Figure 4-D) will also populate automatically based on the printer settings you selected.

2. Click OK

   (You should now see an outline of your ID badge size on the GuardDraw screen.)

PAPER OR TESLIN - Page Setup

1. Click **CARD SIZE** drop down and select **CUSTOM SIZE**, type in the **WIDTH & HEIGHT** (Figure 4-A) of your card.
2. Select the **CARD ORIENTATION** (Figure 4-B)
3. Type in the **PAGE LAYOUT SETTINGS** (Figure 4-C)
4. Type in your **TOP** & **LEFT** margins (Figure 4-D)

> (You only need to measure the top & left margins. The right & bottom margins will automatically fill in based on all your previous settings)

5. Click **OK**

> (You should now see an outline of your ID badge size on the GuardDraw screen.)

GUARD DRAW SCREEN
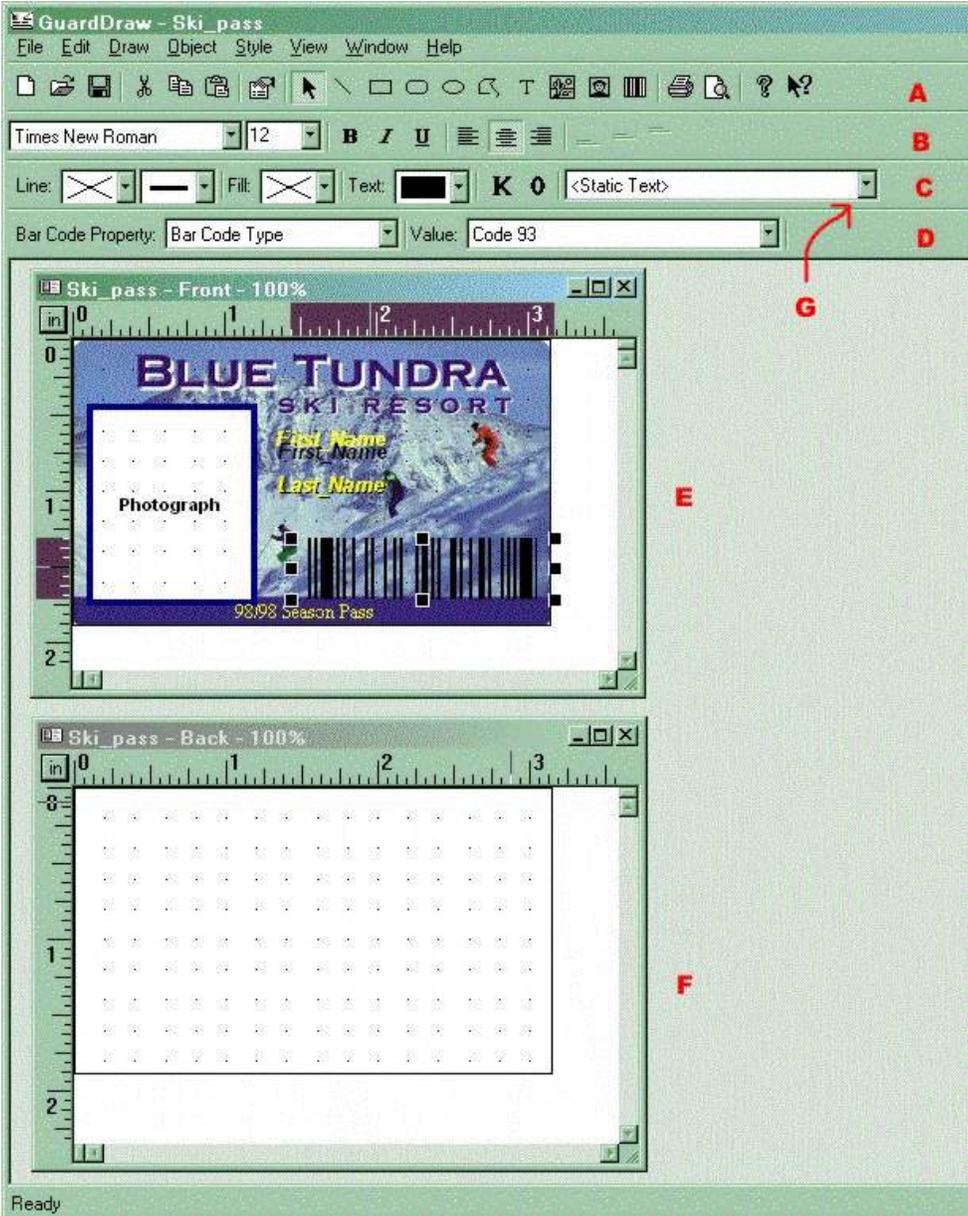
(Figure 5)

ADDING OBJECTS TO YOUR BADGE DESIGN

The design module allows you to add the following to your badge design.

1. Database fields & images
2. Static Text
3. Basic Geometric shapes (circles, ovals, rectangles, etc...)
4. Logo files or Backgrounds
5. Barcodes
6. Magnetic Stripe setup

(Placing cursor over a particular toolbar button for 2 seconds will display the button name)

DATABASE IMAGES (Photograph, Signature, etc...)

1. Click on **DB IMAGE** button on toolbar (Figure 5-A)
2. Select the **DB IMAGE** you want to add from the drop down(Figure 5-G)
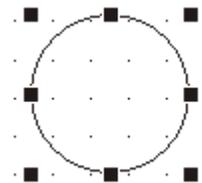3. Hold **LEFT** click to drag the size of image (Figure 6)
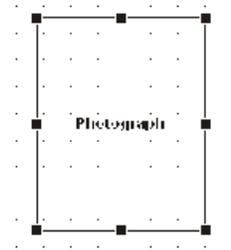
(Figure 6)

GEOMETRIC SHAPES

1. Click on one of the 5 **GEOMETRIC SHAPE** button on toolbar (Figure 5-A)
2. Hold **LEFT** click to drag the size of the geometric shape (Figure 7)

(Figure 7)

BAR CODES

1. Click on the **BAR CODE** button on toolbar (Figure 5-A)
2. Hold **LEFT** click to drag the size of the bar code you want (Figure 8)

   (Whenever a bar code is selected the **BAR CODE PROPERTY** toolbar becomes available (Figure 5-D)

3. Set all bar code properties (see below) by selecting the **BAR CODE PROPERTY** and entering the value in the **VALUE** window on the toolbar (Figure 5-A)

(Figure 8)

   BAR CODE PROPERTIES (Figure 9)

   (See HELP for more detailed explanations of each setting)

   TYPE - lets you choose bar code symbology
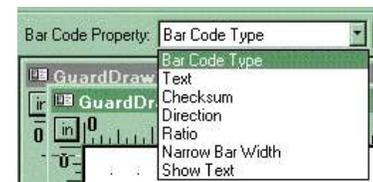   **TEXT** - lets you enter sample text
   CHECKSUM - appends a digit to end of bar code
   DIRECTION - the way you rotate a bar code
   RATIO - ratio of thin bars to thick bars
   NARROW BAR WIDTH - set the width of a thin bar
   SHOW TEXT - lets you see the value that makes up the bar code
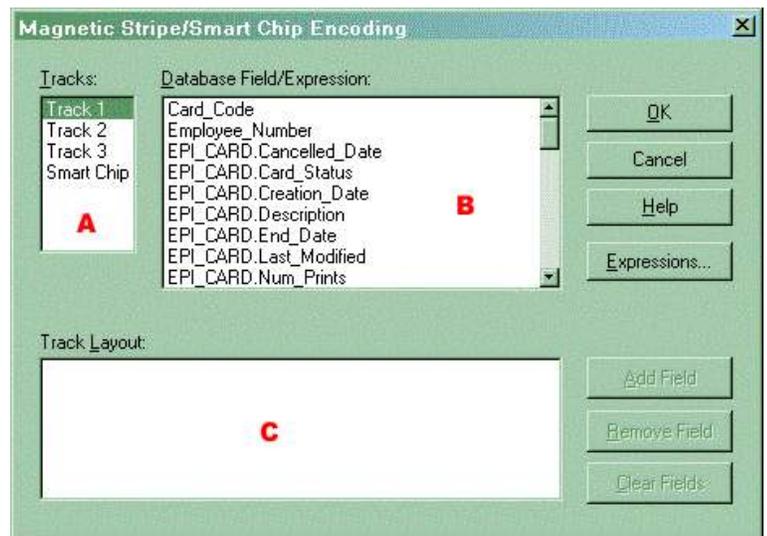
(Figure 9)

🖼️ BITMAP IMAGES OR LOGOS

1. Click on the **IMAGE** button on tool bar (Figure 5-A)
2. Hold **LEFT** click to drag the size of the image you want
3. Click the **LOAD IMAGE** button on the **IMAGE** property window
   that pops up
4. Select the image file (bmp, tif, jpg, etc...)
5. Click **OPEN**
6. Click **OK**

     (To learn more about additional options in the **IMAGE PROPERTIES** window
   click the **HELP** button)

MAGNETIC STRIPE DATA

1. Click on the **EDIT** menu
2. Select **CARD ENCODING**
   (Figure 11 will pop open)
3. Highlight the track (Figure 10-A)
   you wish to set encoding for
4. Highlight the Database field
   or expression (Figure 10-B)
   to be encoded on selected track
   (Figure 10-A)
5. Click the **ADD FIELD** button
   (Field selected will pop into track
   layout window (Figure 10-C)
6. Click **OK**

    (If encoding on more than 1 track, repeat
   steps 3 - 5 before clicking **OK**
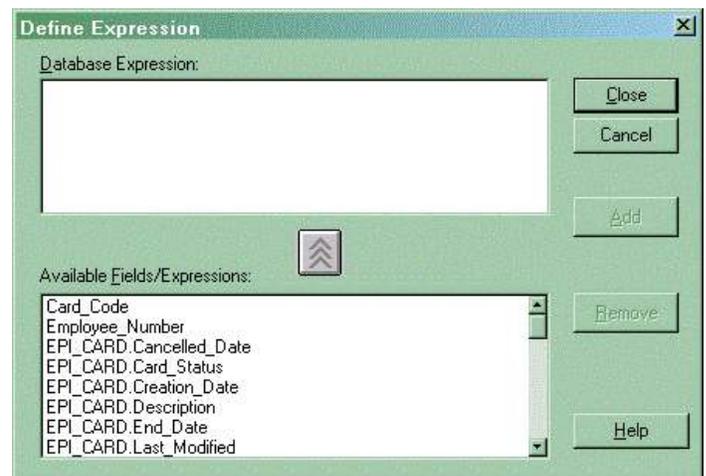

(Figure 10)

DEFINING EXPRESSIONS

You use SQL statement to define expressions.
An expression lets you combine 2 database
fields (First Name, Last Name) to print together.
Or you may need to combine constant data with
a database field to make up your bar code or
magnetic stripe data. (12345 + employee
number)

A basic knowledge of SQL expressions is
required for this feature

1. Click the **EDIT** menu
2. Select **DEFINE EXPRESSIONS**
3. Type in your expression in the window (figure 11)
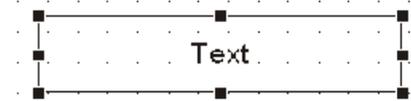4. Click the **ADD** button
5. Click **CLOSE**

When you click the **ADD** button, if you have
created a valid SQL expression, the expression
will pop into the **AVAILABLE
FIELDS/EXPRESSIONS** window (Figure 11)

(Figure 11)

T | DATABASE or STATIC TEXT

1. Click on the **TEXT** button on toolbar (Figure 5-A)
2. Hold LEFT click to drag the size of the text box (Figure 12)
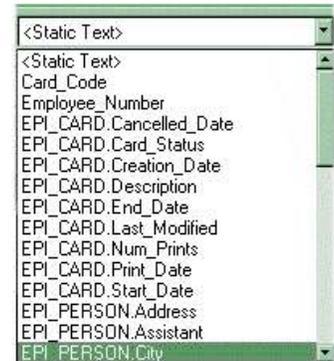
(Figure 12)

STATIC TEXT

1. Select **TEXT** field
2. Click the **TEXT** drop down on toolbar (Figure 5-G)
3. Select **<STATIC TEXT>**
4. Press the **ENTER** key or **DOUBLE** click the text field
   (This brings up the **STATIC TEXT PROPERTIES** box)
5. Type in the desired text
6. Click **OK**

> Hint: To force a return when typing static text hold the
> **CTRL** key down and press the **"J"** key

(Figure 13)

DATABASE TEXT (DYNAMIC TEXT)

1. Select **TEXT** field
2. Click the **TEXT** drop down on toolbar (Figure 5-G)
   (the drop down looks like figure 13)
3. Select the **DATABASE FIELD** or **EXPRESSION**
4. Press the **ENTER** key or **DOUBLE** click the text field
   (This brings up the **DYNAMIC TEXT PROPERTIES** box)
5. Choose any of the options
6. Click **OK**

> (For more detailed information about the **STATIC TEXT PROPERTIES** or **DYNAMIC TEXT PROPERTIES** windows, click the HELP button in their respective windows)

MOVING OBJECTS

1. Highlight the object by **LEFT** clicking on it
2. Use the **ARROW** keys to adjust position of object

CHANGE FILL, LINE or TEXT COLORS

> (Highlight the object to change by **LEFT** clicking on it)

CUSTOM COLORS

1. Click the **LINE**, **FILL** or **TEXT** drop down on the toolbar (Figure 5-C)
2. Select the color

FULL RGB SPECTRUM

1. Click the **STYLE** menu
2. Select either **LINE**, **FILL** or **TEXT COLOR**
   (This brings up the standard Windows color window)
3. Choose a color from the **BASIC** color section or
   click **DEFINE CUSTOM COLORS** to bring up the **RGB**
   palette.
4. Click OK

> Most objects when created have an outline around the field. This is to help you with aligning fields to each other. This outline will print if not removed. To remove this outline, click the **LINE** drop down from the toolbar (Figure 5-C) and choose the no line color which looks like an "X".

CHANGE TEXT ATTRIBUTES (Font, font size, font color, justification)

1. Select the text field to be adjusted by **LEFT** clicking on it
2. Adjust font, font size, or justification using the **TEXT STYLE** toolbar (Figure 5-B)

RE-SIZING OBJECTS

When an object has been selected, its size is shown by the black outline and the 8 black squares around it. (Figures 6,7,8,11)

To re-size the object **LEFT** click and hold one of the black squares and drag it. (Corner squares move 2 edges simultaneously, others move 1)

ROTATING OBJECTS

1. Highlight the object by **LEFT** clicking on it
2. Click the **OBJECT** menu
3. Select **ROTATE 90 DEGREES**
4. Select **LEFT** or **RIGHT**

ALIGNING OBJECTS

1. Highlight the objects to be aligned by holding down the **SHIFT** key and **LEFT** clicking on each object
2. Click the **OBJECT** menu
3. Select **ALIGN & DISTRIBUTE**
4. Choose the type of alignment you wish to perform

PLACING A BACKGROUND ON CARD

A background can be a solid color or an image file that covers the entire badge and is placed behind all other objects on the badge.

SOLID COLOR

1. Click the **EDIT** menu
2. Select **BACKGROUND**
3. Select **COLOR**
4. Select the color
5. Click **OK**

BITMAP IMAGE

1. Click the **EDIT** menu
2. Select **BACKGROUND**
3. Select **IMPORT**
4. Select file to import and click **OPEN**
5. **CROP** the image
6. Click **OK**

REMOVING A BACKGROUND

1. Click the **EDIT** menu
2. Select **BACKGROUND**
3. Select **REMOVE**
4. Select **IMAGE** or **COLOR**
5. Click **YES**

SWITCHING BETWEEN FRONT & BACK OF BADGE

1. Click the **VIEW** menu
2. Select **FRONT OF CARD** or **BACK OF CARD**

Once you have finished designing your badge, save the design. We recommend that you create a folder called Badge Designs and put all your designs in this folder.

***** ***After you have created all your badge designs, you need to set them up in GUARDCARD Under the CARD FORMAT SETUP section under the FILE menu.*** ******

GUARDCARD SETUP

GuardCard is the main module in which ID badge production is done. In this section we will explain the most common setup tasks. These options need to be performed for each database you created. For more detailed explanations of each setting click the HELP button or press F1 key.

Here is a list of steps to setting up GuardCard:

1. Attach to database you created
2. Set database option settings
3. Setup how database image fields are stored
4. Setup Data Entry Screen
5. Setup the type of encoder you're using (optional)
6. Setup the device used to capture images
7. Adding users
6. Card Format setup

CONNECTING TO DATABASE

1. Click the **VIEW** menu
2. Select **OPTIONS** (Figure 14)
3. Click **DATABASE** tab
4. Look in the window (figure 14-A) to see which database is currently connected.
5. If it is the correct one, just click **CANCEL**, if it isn't, click the **CHANGE DATABASE** (figure 14-B) button.
6. Click the **BROWSE** button
7. Select the database you'd like to make ID badges for
8. Click **OPEN**, **OPEN**

ADJUSTING DATABASE SETTINGS

We recommend keeping most of the default settings. Below we list the settings we recommend be changed. If you'd like to learn more about each setting click the **HELP** button on each **TAB**.

(Click on **VIEW** menu then **OPTIONS** to adjust settings)

DATABASE TAB

1. **UNCHECK** - Save all DATE/TIME as GMT

GENERAL TAB

1. **CHECK** - Notify when no records are selected
2. **UNCHECK** - Manually validate cards after printing

IMAGE SETUP TAB

We recommend keeping all these settings at their defaults. If you'd like to adjust these setting please click **HELP** to learn more about image setup.

Click **OK** when you're finished adjusting all database settings.

**** When you click OK, you may get some INDEX error messages. Just accept them for now. They won't come back once we finish setting up GUARDCARD. ****
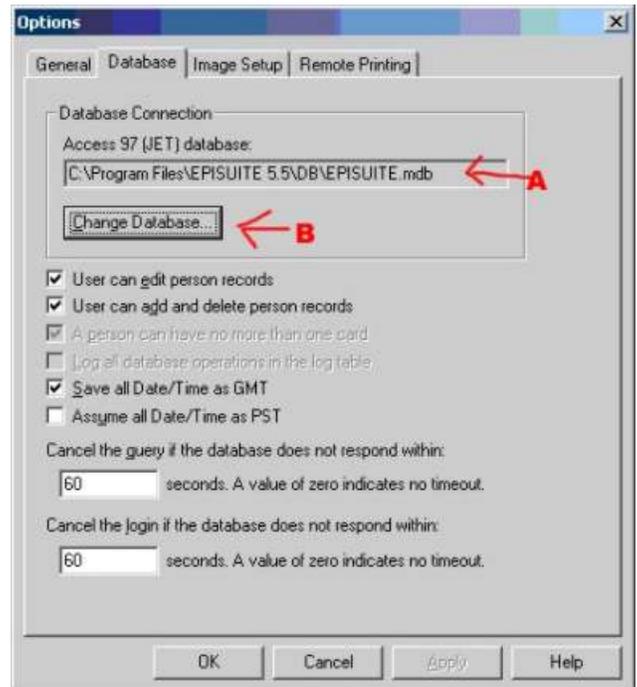
(Figure 14)

ADDING FIELDS TO INPUT SCREEN

1. Click the **VIEW** menu
2. Select **DATA FIELD SETUP** (Figure 15 appears)

REMOVING FIELDS

1. Select field in **LABELS** window
2. Click the **REMOVE** button

   (Remove all fields from the **LABELS** window when setting up a database for the first time. This will remove those index errors mentioned earlier)

ADDING FIELDS

1. Click the **ADD** button (Figure 16 appears)
2. Select the database field from the **FIELDS** list
3. Change the **FIELD LABEL** if you wish
4. Check the **FIELD TYPE** you want

   (For **DROP DOWN** boxes, click the **LIST PROPERTIES** button to enter values for the list.)

5. Set any **FIELD VALIDATION** settings
   (We don't recommend setting these)
6. Click **OK**

   (The field label will display in the **LABELS** window in figure 15

Repeat steps 1 - 6 until you have added all your database fields into the **LABELS** window (Figure 15)

ADJUSTING FIELD POSITION (Sequence)

1. Select the label name in the **LABELS** window (Figure 15)
2. Click the **MOVE** arrows (Figure 15) to move the field up or down in the list

(Repeat steps 1-2 until you have all the field labels in the order you wish.)

3. Click **APPLY**

ADDING IMAGE FIELDS

Place a **CHECK** in the image field(s) that you wish to display.

To change a field label and/or its settings, click on the field label and click the **CHANGE** button (Figure 15). This brings up a window exactly like figure 16. Make your changes and click **OK**.

When you are all done Click the **OK** button in figure 15. The GuardCard screen should now reflect your settings.
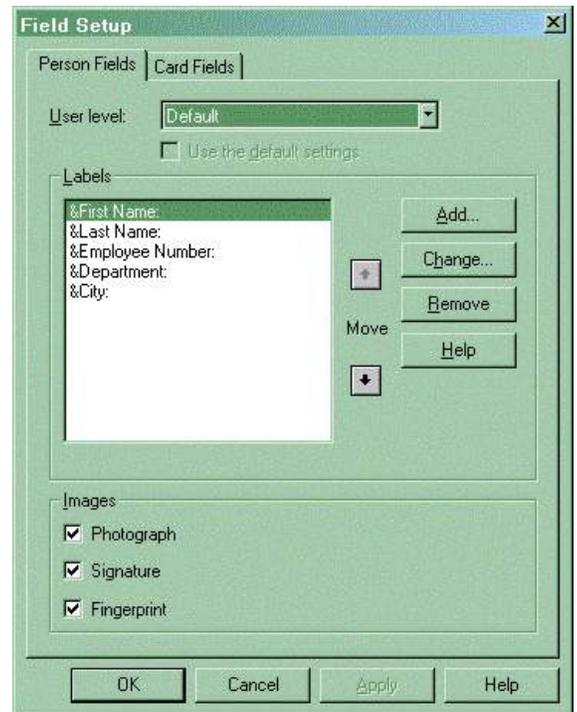
(Figure 15)
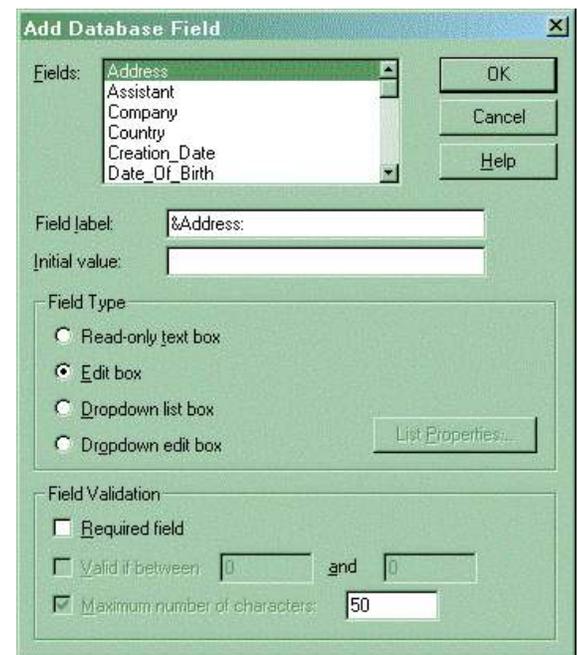
(Figure 16)

CARD PRINTER ENCODER SETUP

(You only need to perform this step if your PVC card printer has an encoder in it.)

1. Click **FILE** menu
2. Select **CARD PRINTER ENCODER SETUP** (Figure 17 appears)
3. Click **PRINTER NAME** drop down and select your printer
4. Select **MAGSTRIPE PRINTER ENCODER**
5. Click the **SETUP** button
6. Click the **IMPORT** button
7. Click **YES** to overwriting current settings
8. Browse out to the following folder
   (c:\program files\Imageware Systems Inc\Episuite SDK \5.0\Encoders Setup Files\Printer Magstripe)
9. Select the file that corresponds to your printer manufacturer
10. Click **OPEN**
11. Click **OK**, **OK**

(Figure 17)

IMAGE CAPTURE DEVICE SETUP

1. Click the **IMAGE** menu
2. Select **SET SOURCE**
3. Choose the image type you'd like to set up
4. Select the device from the list
5. Click **OK**

ADDING USERS

1. Click **VIEW** menu
2. Select **MANAGE USERS**
3. Click **ADD** button (Figure 18 appears)
4. Type in **LOGIN** information
5. Select **SECURITY LEVEL**
6. Click **OK**

   (Repeat steps 3-6 for each user you wish to add.)

7. Click **CLOSE**
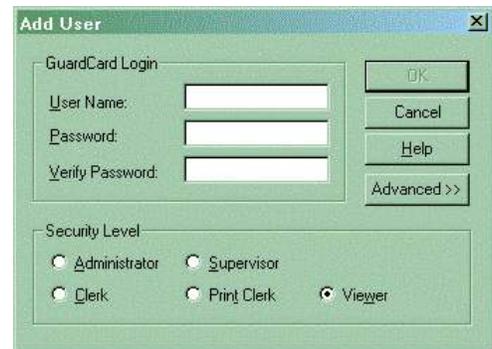
(Figure 18)

CARD FORMAT SETUP

Card format setup is the section in which you attach all the ID Badge designs you created to your database. You can have as many **CARD FORMATS** as you want. When you add a record to your database you select the **CARD FORMAT** that the record will use.

1. Click **FILE** menu
2. Select **CARD FORMAT SETUP**

   (A window appears showing you all the currently attached formats)

3. Click the **ADD** button (Figure 19 appears)
4. Type in the Name you wish to give the **CARD FORMAT**
5. Click the **BROWSE** button and select the ID Badge design (GuardDraw) file that corresponds to this format
6. Click **OPEN**
7. Set up **CARD IDENTIFICATION CODES**
8. Click **OK**, **CLOSE**

   (Click **HELP** for more detailed information)

   (To set a default format **LEFT** click on it and Click the **SET DEFAULT** button)
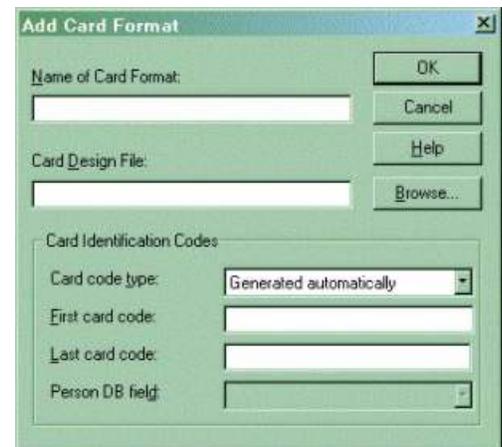
(Figure 19)

GUARDTOOL REPORTS

The GuardTool Report module gives you the ability to run pre-defined reports on the data in your database. There are 9 pre-defined reports. You can't change the layout of the reports, you can only change the data that is printed on the report. We recommend previewing the reports once you have sufficient records in your database to see if any of them will work for you.

For more detailed information on using the report module, please refer to the online help.

OPENING REPORT MODULE

1. Click **START**
2. Select **PROGRAMS**
3. Select **EPISUITE X 5.5 for Windows** (x=Lite, Classic or Pro)
4. Select **GUARDTOOL REPORTS** (Figure 20 appears)

The first step is to make sure you're connected to the database for which you want to run reports. Figure 20-D shows you the currently connected database. If this is the correct database, you can start running reports. If not, click the **CONNECT TO DATABASE** button (Figure 20-A) and connect to the database for which you will run reports.

The report module prints reports to your Windows default printer. If your default printer isn't a laserjet or inkjet printer, you will need to set one as the default. To do this click on **PRINTER** button (Figure 20-C), (this brings up Windows printer folder), set the new default printer, close the Windows printer folder window. Click the **REFRESH** button (Figure 20-C). The printer name should now display in the **DEFAULT PRINTER** window.
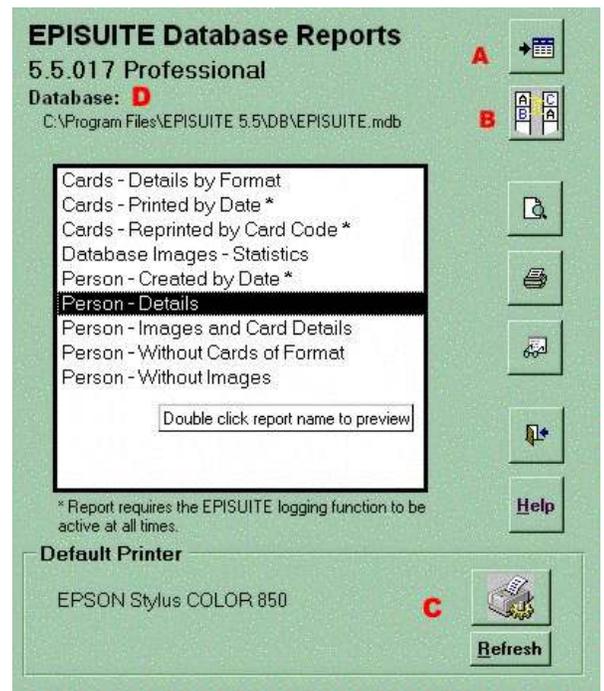
(Figure 20)

RUNNING DEFAULT REPORTS

To run one of the 9 default reports, highlight the report you wish to run, then click on the **PREVIEW** button. This will bring up a selection window. The default selection criteria is for all records. If you want to run the report for selected data, define your own criteria, then click **OK**.

The report will run and show on the screen. If you like this report and want to print it, just click on the **PRINTER** icon on the top toolbar. If you don't, then just click **CLOSE**.

(Figure 21)

CHANGING THE DEFAULT FIELDS

You can change the data that prints on the report by mapping a different field to the default field and changing its label. You cannot change the layout of the report. To do this, click on the **FIELD MAPPING** button (Figure 20-B). This will bring up figure 21.

FIELD MAPPING

1. Map the field you'd like to print instead of default (Figure 21-A)
2. Change the default label to the label you wish to print (Figure 21-B)
3. Click **OK**
4. Click the **PREVIEW** button in figure 20
5. **PRINT** the report if it looks ok, or **CLOSE** the report
   and start over.