ID BADGE PRODUCTION

A quick tutorial on how to produce
ID badges using Episuite® Software

created by

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GUARDCARD - ID badge production

This manual assumes all setup procedures have already been done by the administrator of the software, and that the user has a basic knowledge of Windows and Windows terminology. There are two ways of producing badges in GuardCard (see below).

> **SCRATCH** - meaning there is no employee record in the database
> **EXISTING RECORD** - meaning an employee record DOES exist in the database
>
>> (Existing records could exist because data was imported into database during setup or the employee was issued a badge already and needs a new one.)

Open **GUARD CARD** by clicking **START**, **PROGRAMS EPI Suite 6**, then **GUARD CARD**. Type in your **username** and **password**. To see which database the software is connected to, look on the title bar (Figure 1-A). The last word will be the database it is connected to. If this isn't the database you need, change to the database you want.

You can ask the administrator of the software to create a shortcut to GuardCard on your desktop. To open the program DOUBLE click the shortcut icon.
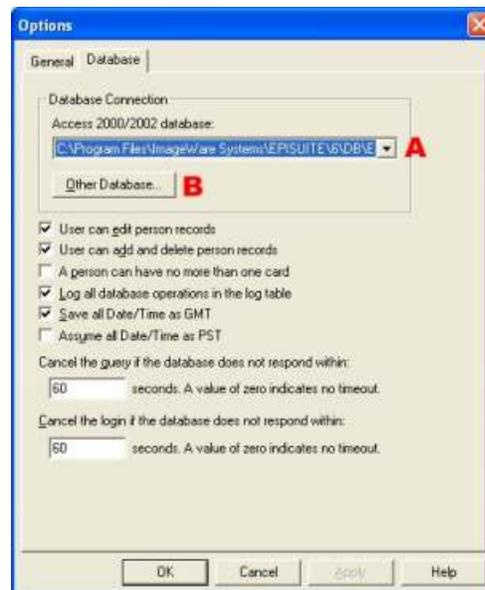
(Figure 1)

CONNECTING TO / CHANGING DATABASES

If you are using more than one database in your ID badge production, you will need to make sure you are connected to the correct database before producing ID badges. Start with the section on **CHANGING DATABASES**.

If you are just using one database, skip the section on **CHANGING DATABASES**.

1. Click the **VIEW** menu
2. Select **OPTIONS**
3. Click **DATABASE** tab (Figure 2)
4. Click the drop down (Figure 2-A) to see a list of recently opened databases or click the **OTHER DATABASE** button (Figure 2-B) to search for one.
5. Click the **BROWSE** button
6. Select the database you'd like to make ID badges for
7. Click **OPEN**, **OPEN**, **OK**

(The main **GUARDCARD** screen should change to reflect the settings for that particular database.)

(Figure 2)

(Figure 3)

PRODUCING ID BADGES

If using multiple databases, please make sure you are connected to the correct database before producing ID badges. (See **CHANGING DATABASES** in previous section.)

The **GUARDCARD** screen (Figure 3) is made up of 2 sections.
     1. The **PERSON** section (Figure 3-P)
     2. The **CARD** section (Figure 3-C)
Each section has its own toolbar.

FROM SCRATCH

1. Click the **ADD** (Figure 3-A) button on the **PERSON** toolbar (Figure 3-P)
2. Fill in all database fields in **PERSON SECTION** (First Name, Last Name)
3. Capture all images (see section on **IMAGE CAPTURE**)
4. Click the **SAVE** person button (Figure 3-H) on the **PERSON** toolbar (Figure 3-P)
5. Select the **CARD FORMAT** (Figure 3-F) from the drop down that this person will be using
6. Click the **SAVE** card button (Figure 3-D) from the **CARD** toolbar (Figure 3-C)

You have now added a new record into your database. You can either print the record you just added by clicking the **PRINT** button (Figure 3-T) or continue adding records and perform a **BATCH** print later. (See the **BATCH PRINTING** section on how to perform batch printing. You can preview both sides of the card in the **CARD** section of the screen using the **FLIP CARD** button (Figure 3-U) to see the other side. You can also click the **PREVIEW** button (Figure 3-R) to see an enlarged preview.

FROM EXISTING RECORD

Without Card Format

1. Run a query to retrieve the employee record
   (see the **DEFINING & RUNNING QUERY** section for directions)
2. If there is no **CARD FORMAT** attached to this record click the **ADD** button (Figure 3-E) on the
   CARD toolbar (Figure 3-C)
3. Click the **CARD FORMAT** drop down (Figure 3-F) and select the card format this person will be using
4. Click the **SAVE** button (Figure 3-D) from the CARD toolbar (Figure 3-C)
5. Fill in or update **PERSON** data fields as needed
6. Capture any images (see **IMAGE CAPTURE** section)
7. Click the **SAVE** button (Figure 3-H) on the **PERSON** toolbar (Figure 3-P)
8. Click the **PRINT** button (Figure 3-T) on the **CARD** toolbar (Figure 3-C) to print this badge now,
   or you can wait and **BATCH PRINT** (see section on **BATCH PRINTING**) after you have finished
   updating all your records.

With Card Format (Re-print ID badge)

1. Run a query to retrieve the employee record
   (see the **DEFINING & RUNNING QUERIES** section for directions)
2. Fill in or update **PERSON** data fields as needed
3. Capture or re-capture any images (see **IMAGE CAPTURE** section)
4. Click the **SAVE** button (Figure 3-H) on the **PERSON** toolbar (Figure 3-P)
5. Change the **CARD STATUS** (Figure 3-S) to **UNPRINTED** (see paragraph below on how to do this)
6. Click the **PRINT** button (Figure 3-T) on the CARD toolbar (Figure 3-C) to print this badge now,
   or you can wait and do a **BATCH PRINT** (see section on **BATCH PRINTING**) after you have finished
   updating all your records.

> In order to print an ID badge from a record that already has a **CARD FORMAT** (Figure 3-F) attached to it,
> its **CARD STATUS** (Figure 3-S) must be **UNPRINTED**. Normally once a badge is printed the **CARD
> STATUS** is set to **VALID**. To change the status, select the **CARD** menu, then **CHANGE CARD STATUS**
> (shortcut key is **F8**). This will bring up a window with a drop down listing many different statuses. By
> default, **UNPRINTED** is listed. Click **OK** and you will see the **CARD STATUS** change to **UNPRINTED**.
> Now you can re-print the ID badge.

BATCH PRINTING

Reminder: In order to print ID badges the **CARD
STATUS** (Figure 3-S) must be **UNPRINTED**.

1. Click the **FILE** menu, then **BATCH PRINT CARDS**
2. Select the format(s) you'd like to batch print
   (Figure 4-A)
3. Select the cards you'd like to print (Figure 4-B)

By default all cards with a **CARD STATUS** of
unprinted will be printed. If you'd like to print just a
selection of the cards that haven't been printed,
check the **SELECTED CARDS ONLY** circle and
click on the **SELECT CARDS** button (Figure 4-C).
This will bring up the **DEFINE QUERY** screen
(Figure 8). (See section on **DEFINING &
RUNNING QUERIES** for instructions on how to
define queries)
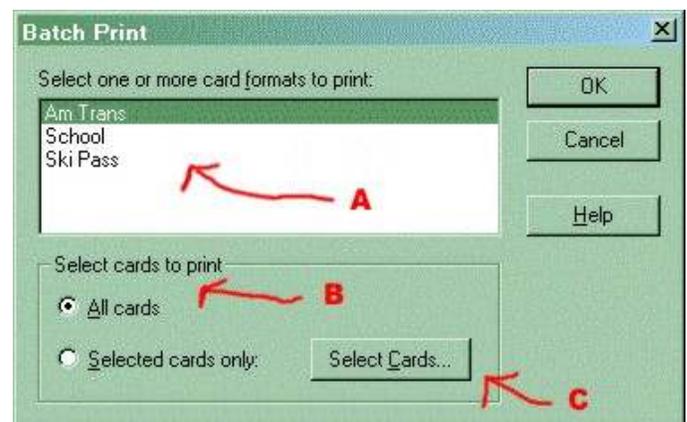
4. Click **OK** to start batch printing process

(Figure 4)

IMAGE CAPTURE (PHOTO, SIGNATURE, ETC...)

To capture an image, select either the **CAPTURE** (Figure 3-B) button on the **PERSON** toolbar and chose the image you wish to capture, or **RIGHT** click on the image field and **LEFT** click capture.

(This will activate the device being used to capture the image. You will need to know how to operate this device.)

Once you have captured the image, it will be transferred into the **IMAGE ENHANCEMENT** window. (Figure 5)
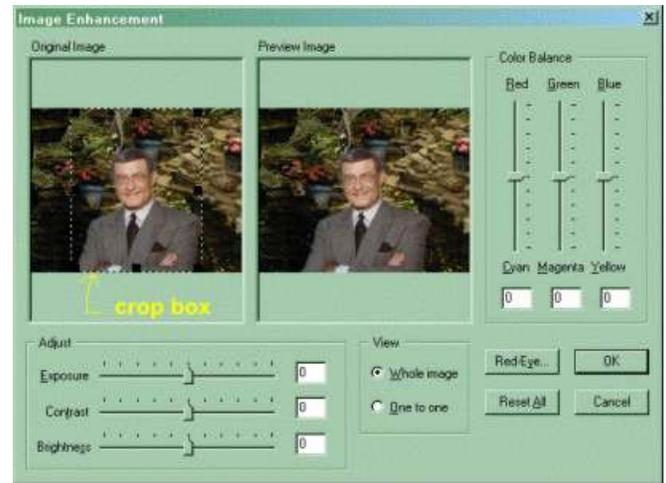
(Figure 5)

IMAGE CROPPING

In the **IMAGE ENHANCEMENT** window (Figure 5), you will see a crop box in the **ORIGINAL IMAGE** pane. (Crop box is represented by dotted rectangle with 8 ■'s on it.) Whatever you have showing in this box is what is transferred into the image field in the database.

MOVING CROP BOX

Place cursor anywhere inside the crop box, cursor will look like this. ⊹
Hold **LEFT** click and drag box to desired position.

SIZING CROP BOX

1. Hold **LEFT** click on any of the 8 ■'s and drag out or in to desired size.
-OR-
2. Place cursor anywhere inside the crop box. Hold **RIGHT** click (cursor will change to this ↕) and drag either up or down to desired size.

IMAGE ADJUSTMENT

To adjust the image brightness, contrast, or color, **RIGHT** click on the image field and select **ADJUST BY EXAMPLE**. (Figure 6).

The **ORIGINAL IMAGE** pane shows a blue square, the content of this square is what displays in the 9 sample windows. To move the blue square, just place your cursor anywhere in it, hold the **LEFT** mouse button down and drag it to the part of the image you'd like to see.

You can adjust, *brightness, contrast, focus, exposure, red, green,* or *blue* in the image. Select the corresponding tab. The middle image always contains the last adjustment. The other images show 4 samples of increasing and 4 samples of decreasing the adjustment you're on.

Once you are satisfied, click **OK.** The modified image will be transferred to your database.
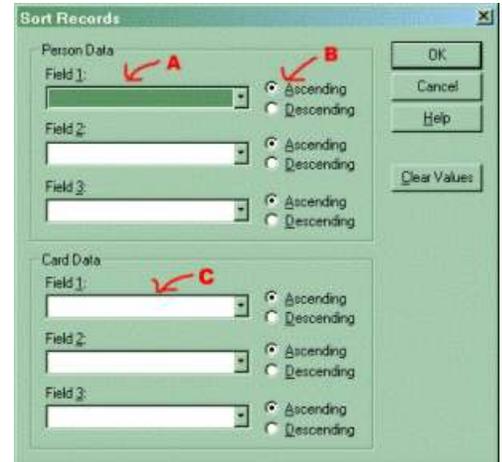

(Figure 6)

DEFINING & RUNNING QUERIES

When running a query, you usually want the records that are found to come up in a certain order (usually in alphabetical order), this is accomplished by setting the **DEFAULT SORT ORDER**.

SETTING DEFAULT SORT ORDER

1. Click the **QUERY** menu, then **SET DEFAULT SORTING** (Figure 7 appears)
2. Select the **PERSON** fields (Figure 7-A) from the drop down or the **CARD** fields (Figure 7-C) that you'd like to sort by.
3. Then select either Ascending or Descending (Figure 7-B)

   Most users sort by Last Name (Ascending), First Name(Ascending). This produces an alphabetically sorted list when a query is run.

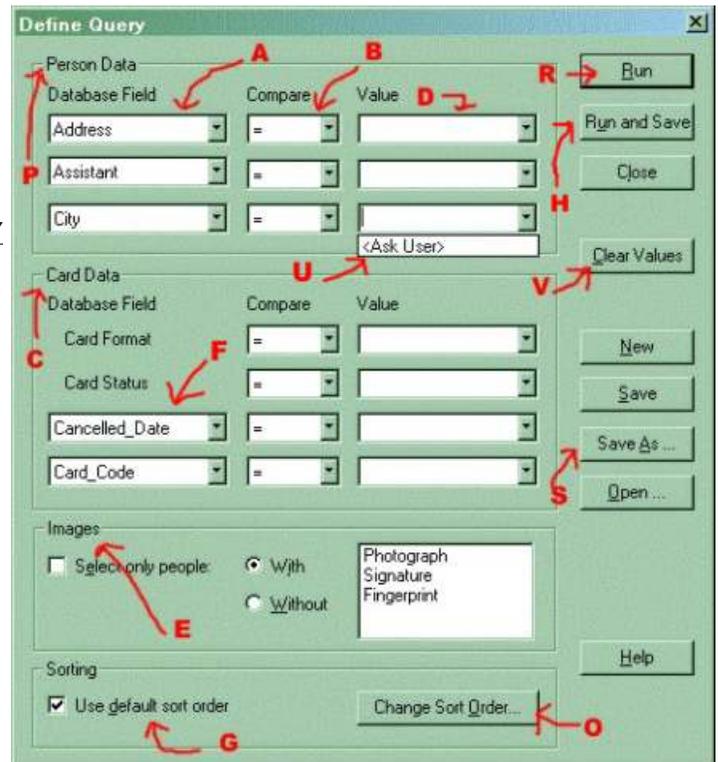(Figure 7)

DEFINING QUERIES

You can define and save queries that you run often, or you can define a one-time query. You can query by up to 3 Person data fields, 2 Card data fields, including Card format & Card status, and by image fields. (For more detail on the use of the **DEFINE QUERY** screen, click the **HELP** button located at the lower right corner of the screen)

1. Click the **QUERY** menu, then **DEFINE QUERY** (Shortcut key **F3**), this brings up the **DEFINE QUERY** window (Figure 8)
2. Select the **PERSON FIELDS** (Figure 8-A), or **CARD FIELDS** (Figure 8-F)
3. Choose the **COMPARE** value (Figure 8-B) from drop down box.
4. Enter the **VALUE** (Figure 8-D) that you'd like to query by.

   (If you don't know how to spell the name, you can do a wildcard search by typing "smi*" into the value field. This will bring up any value beginning with "smi".)

5. Select the type of image fields you like to query by, if any (Figure 8-E).
6. Click **RUN** (Figure 8-R) to run this query one time

If this is a query you plan on running frequently, click on the **RUN & SAVE** button (Figure 8-H) instead of **RUN**. In the window, type in the name you'd like to save this query under.

(Figure 8)

If you set the **VALUE** (Figure 8-D) field to the option of **<ASK USER>** (Figure 8-U) and save the query, the next time you run the query, it will bring up a query window (Figure 9) showing just the fields you set to **<ASK USER>**. This is a much more manageable query window than the main **DEFINE QUERY** (Figure 8) window.
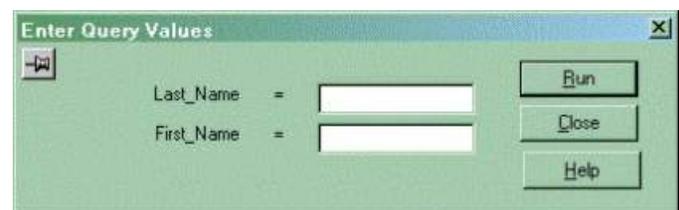
(Figure 9)

DEFINING & RUNNING QUERIES (continued)

RUNNING SAVED QUERIES

Episuite always remembers the last query that you ran.   There are 3 ways to re-run your last query:

1. Click the **QUERY** menu, then **RUN LAST QUERY**
2. Use shortcut key **F5**
3. Click the **RUN LAST QUERY** button (Figure 10-L) on the **PERSON** toolbar.

The **QUERY** drop down (Figure 10-Q) under the **PERSON** toolbar shows all saved queries. To run a saved query, click on the drop down arrow and select the query you'd like to run. If the saved query had **<ASK USER>** set, then the **ENTER QUERY VALUE** window (Figure 9) would pop up, if not then the query would run automatically.

(Figure 10)

When the query is run, if no records are found, you will get a pop up window telling you **NO RECORDS FOUND**. If the query locates records, the **GUARDCARD** screen will show the first record that is found. The **PERSON** toolbar will display how many records were found (Figure 10-R) and they will be sorted by the criteria you set up in **SET DEFAULT SORT ORDER** under the **QUERY** menu. To scroll through the records found in the query use the **ARROWS** (Figure 10-A) located on the **PERSON** toolbar.

SPECIAL NOTES ON RUNNING QUERIES

1. Try to query by fields that have unique values, (employee #, social security) This should select only one record.
2. When setting up an **<ASK USER>** query, you don't need to set just one field to this value. (Figure 9 shows first name & last name)
3. When running an **<ASK USER>** query, you don't have to enter values for all the fields in the query.