System Galaxy Quick Guide CONFIGURATION AND OPERATION



CEX – Card Exchange v7 Networked INTEGRATED BADGE DESIGN & PRINTING

Includes Badge Template-Sharing on Network Also see the CEX-7 Addendum JAN 2021 SG 11.7.0 to Current

| System Galaxy Version 11.x Integration with Card Exchange 7 <i>User Mini-Guide</i> | Information in this document is subject to change without notice. Therefore, no claims are made as to the accuracy or completeness of this document. |
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Introduction to Badging with Card Exchange 7

This manual covers the basics of installing, configuring, and using the new badging software.

System Galaxy offers a new card/badge interface built with <u>CEInside (Card Exchange) v6.03</u>. System Galaxy has integrated the **Card Exchange Badge Designer** and **Print Engine** into the SG software.

Overall Requirements for Card Exchange:

NEW INSTALL REQUIREMENTS:

- You must choose to install either the (a)Full Installation or the (c) Badging Workstation when running Part-3 of the SG 10.3 Galaxy Installer from DVD-1.
 - The *Full Install option* installs a communication server (including GCS Services, event logging/ monitoring, the badging capability.
 - The Badging Workstation option and badging workstation options includes badging software onto the desired workstation (i.e. either). The install will put down a CEX folder inside the System Galaxy folder which includes your CEX install .bat file.
- You must install and configure the badging printer/printer driver correctly on the computer running the badging client software.
 - The **printer options** must be set to support printing the type of cards you will use.
 - The **printer driver** must be setup to support the features or specifications needed.
 - Galaxy sells and supports the MagicCard line of printers.
 - Galaxy also supports an array of other leading badge printers. When planning for badging, you should <u>verify the chosen printer will support the features you desire</u>. Contact Galaxy Control Systems Technical Support for details.
- You must run the Card Exchange *install.bat* file to perform the correct installation of Card Exchange.
 - The *install.bat* file is put down in the System Galaxy folder:
 C: GCS\System Galaxy\CEX\Install\install.bat
 - <u>Do NOT run the Card Exchange setup file separately. Galaxy does not license a standalone</u> version of the Card Exchange product.
 - When you run the install file, the installer program installs the CEX-7 software inside the System Galaxy folder and also places the badge design templates and data folder under the System Galaxy folder.
 - Ports 4747, 4748, and 4749 must be unblocked for the print server to operate (these ports should automatically be opened by the installer.
 - The license file requires port 5093 to be open/unblocked on the server, which is automatically opened by the installer.

UPGRADING PRE-EXISTING VERSIONS OF CARD EXCHANGE:

• To ADD or UPGRADE BADGING on an existing System Galaxy v8 client:

If the workstation/PC had other badging software (such as EpiBuilder), those templates are not compatible with **Card Exchange** and no method of conversion exists. You must to redesign your badge templates in the Card Exchange Designer after completing your upgrade/installation.

In order to switch over to the Card Exchange software, you will upgrade the existing SG Communication server by running all three parts of the installer :

(and you will run all the install modules of the or no badging software, then you will run the GalSuite part-3 to upgrade the software and follow the install instructions in the **next section**, beginning with step 2.

- For an existing SG client that is already licensed for the previous badging software: see the System Galaxy Software Install and Software User manuals that cover your badging software. Galaxy continues to support the previous software under the valid license agreement you purchased.
 - SG 9 integrated with Card Exchange 4 ∼ the same upgrade instructions apply to upgrading to CEX-7 as did with CEX-6.
 - SG 10.0 integrated with Card Exchange 6. You must run Galaxy install Part-3 and allow the Galaxy Installer to uninstall the old v6 and then install }

Installing and Configuring the Badging components

| STEP | ACTION | | | | | | |
|------|--|--|--|--|--|--|--|
| 1 | INSTALL SYSTEM GALAXY SOFTWARE | | | | | | |
| | You must correctly install all parts of the System Galaxy software (1, 2, and 3). | | | | | | |
| | Part 1 – install prerequisite components ~ required | | | | | | |
| | Part 2 – install MS SQL Components ~ required. If you are installing a workstation that is part of a distributed solution (i.e. separate database server), you will install only the MS SQL Native Client components. | | | | | | |
| | Part 3 – Installing the System Galaxy software for a client workstation that supports badging. Two possibilities are available: | | | | | | |
| | a) Option A – is a complete install: this includes System Galaxy software and badging components along with core services. You will only choose this if you are installing a Communication Server. b) Option B – is a client only workstation install: this installs System Galaxy software and badging components. | | | | | | |
| 2 | INSTALL THE BADGE PRINTER DRIVER | | | | | | |
| | Install the printer driver according to manufacturer's instructions and perform a test print using the desired print settings. | | | | | | |
| 3 | INSTALL CARD EXCHANGE INSIDE SOFTWARE AND TEMPLATES | | | | | | |
| | Go to C: Program Files\System Galaxy\CEX and run the "install" file to begin the installation. | | | | | | |
| | The Card Exchange install will run as follows: | | | | | | |
| | a) the CEX software installs in the System Galaxy/CEX folder | | | | | | |
| | b) All the templates and data folder are installed in the System Galaxy Badging at the root of the C-drive. Note: if you are running VISTA [®] you must store your System Galaxy photos directory to the new badging folder just created C: DRIVE. | | | | | | |
| | Cip Data File Edit View Favorites Iools Help | | | | | | |
| | Search Polders | | | | | | |
| | Address C:\System Galaxy Badging\Data | | | | | | |
| | spoolerlogs System Galaxy Badging System Galaxy Badging Galaxy Badging | | | | | | |
| | CardExchange CSV Demo CardExchange CSV Demo Dehotos | | | | | | |
| | Templates Templates | | | | | | |
| | test im interval inter | | | | | | |
| | ⊕ GHOST (E:) ⊕ GHOST (E:) ⊕ Most (E:) ⊕ Most (E:) ⊕ SysGal830_D1 (F:) ⊕ Most Technical on '2kfile-svr' (1:) | | | | | | |

Registering System Galaxy for Badging

You must perform the Registration according to purchase order.

SYSTEM REGISTRATION:

- At the Communication Server, start System Galaxy and logon as a master operator.
- Open the workstation registration screen from the Galaxy menu: Configure > Options >Registration >Registration Wizard (or System Registration).
- Also perform the local workstation registration for this server as appropriate. If the main communication server will not host the badging station (typical), then do not register badging options at this computer.

IMPORTANT: System Registration is done before the Workstation Registration. The *system registration* registers the database and extended features according to purchase agreement.

IMPORTANT: the databases/database server, and communication server/core services must be running and online during system registration in order to get a valid registration code.

Refer to Chapter 5 of the SG 8.3 Software User manual for detailed information about System Registration.

WORKSTATION REGISTRATION:

- At the badging workstation PC, start System Galaxy and logon as with a master operator sign-on.
- Open the Workstation Registration screen from the Galaxy menu: Configure > Options >Registration >Local Workstation.
- Register the badging features according to the customer purchase agreement.

IMPORTANT: the databases/database server, and communication server/core services must be running and online during system registration in order to get a valid registration code.

Refer to Chapter 5 of the SG 8.3 User manual for detailed information about Workstation Registration.

| roduct Registration | |
|--|--|
| Workstation Registration | |
| _ Local Workstation Registration: | |
| System ID: 613950580 | Product Key: |
| J Workstation ID: xB942T6C33YR2MT4J | Workstation Description: |
| Created Date/Time: | Last Registered Date/Time: |
| 12/6/2007 12:28:21 PM Client/Server Features: | 3/28/2009 10:43:16 AM Badging Features: |
| C Client Only Comm. Server & Client | Photo Capture Enabled Printing Enabled |
| General Features: Autrosafe Fire Interface DS 7400 Interface | Signature Capture Enabled Fingerprint Capture Enabled Encoding Enabled External Badging (View Only) |
| Visit GCSOnline Web Registration Site | Registration Code: C66X35NX Report |
| OK | Cancel Apply Help |

Setting Workstation 'Badging' Options

The Workstation Options must be set up to use the correct Badging Software

- At the badging workstation PC, open the Workstation Options screen from the Galaxy menu: Configure > Options > Workstation Options.
- Select the 'Badging Options' tab, and set Card Exchange Inside as the Badge System type.
- Click the [Browse] button and go to C:\ System Galaxy Badging
- Click **OK** to set the path, and click **APPLY** to save the configuration.
- Restart System Galaxy to initiate changes.

| eneral Options Alarm Options Report Options Multi-Media Badging Options CCTV Options Time & Attendance Option Specify folder location where the images are stored: | |
|---|--|
| C:\System Galaxy Badging | Browse |
| Specify Badging System Type: | Browse for Folder |
| Card Exchange Badging Settings: Print Server URL: tcp://localhost:4747/CardExchangePrintServer Client Port: Display Error Messages 4749 Display Batch Print Error Messages | C:\System Galaxy Badging C:\System Galaxy B |
| | OK Cancel |

Operating the Card Exchange Badging/Print Server

The card exchange print server and badging software is very simple to use. The following sections provide simple steps to starting and using the Print Server and Badge Designer software.

Starting the Card Exchange Print Server

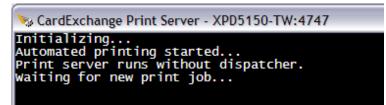
You can start the *Card Exchange* software from inside System Galaxy (toolbar):

• Open System Galaxy from the desktop shortcut or thru the Windows Start menu:

Start[®] > Programs > System Galaxy > System Galaxy

TIP: You can set up Card Exchange to automatically start when the computer boots up. This is done by placing the Card Exchange Print Server in your Programs Start folder.

• a Windows[®] application console opens when the print server starts up.



IMPORTANT: If the text in the Print Server console is red, this means you already have a print server running. Close any Print Server session that has red text; it will not execute print jobs.

- The Card Exchange icon will display on the task tray (XP only) when you minimize the windows operating shell. Windows-7 OS does not display services on the task bar.
- Right-click on the server icon to get to the Card Exchange menu



Stopping the Card Exchange Print Server

• **Right-click on the server icon** to get to the Card Exchange menu

| B & 42 4 | <u>C</u> onfiguration | Printer options | 1 |
|-----------|---------------------------|--------------------|--------|
| BOAA | Show print server | Printer properties | |
| | <u>S</u> top print server | Photo options | |
| CEV Misic | | Show card manager | :50 PM |
| CEX_MiniG | Macromodiin | | |
| | | | 1onday |

• Choose 'Stop print server' option from the context menu.

NOTE: you can click the red-x in the top right corner of the print server console window to close and stop the printer if it is open. Otherwise you must stop it from the menu as shown.

IMPORTANT: it is not recommended to stop the print server while cards are printing.

Showing the Card Exchange Print Server

• **Right-click on the server icon** to get to the Card Exchange menu

| Configuration | Printer options | 1 |
|----------------------------|---|---|
| S <u>h</u> ow print server | Printer properties | |
| ≥top print server | Photo <u>o</u> ptions | |
| E <u>x</u> it | Show card manager | 5:50 PM |
| Macromoditi | | Monday |
| | S <u>h</u> ow print server Stop print server | Show print server Printer options Stop print server Printer properties Stop print server Photo gptions Exit Show card manager |

- Choose 'Show print server' option from the context menu.
- The windows operating shell will re-open

Setting up the Badge Printer

• Right-click on the server icon to get to the Card Exchange menu

| B @ 48 4 | <u>C</u> onfiguration | Þ | Printer options | | |
|-----------|----------------------------|---|-----------------------|---------|--|
| -10 12 14 | S <u>h</u> ow print server | - | r Encer propercies | | |
| | Stop print server | | Photo <u>o</u> ptions | | |
| CEX MiniG | E <u>x</u> it | | Show card manager | 5:50 PM | |
| | - Macromoonn | 6 | 000602 | Monday | |

- Choose 'Configuration > Printer options' from the context menu.
- The *Printer Options* window will open allowing you to choose your badging printer.

NOTE: From this window, you can also set timing delays and Mag-encoder settings.

| 8 | Printer options - [Portrait example] |
|---|--|
| F | rinter Time delays Magnetic-encoder settings |
| | ⊙ <u>W</u> indows printers |
| | \\excelsior\Copier |
| | \\excelsior\Laser 4010 Sales \\excelsior\LaserColor 4550 CS |
| | Microsoft Office Document Image Writer |
| | Adobe PDF |
| | |
| | |
| | |
| [| Apply these settings to all loaded cards |
| | <u> </u> |

• Click **OK** to save settings.

IMPORTANT: The badge printer driver must already be installed.

Setting the Badge Printer Properties

- Right-click on the server icon to get to the Card Exchange menu
- Choose 'Configuration > Printer properties from the context menu.



• The *Printer Properties* screen (for the printer you selected in the previous step) will open allowing you to set up your badging printer properties.

| dvancel Presing Shotcuts Paper/Quality Effects Finishing Job Store PP Laver Set P4010 JP4510 Series PCL 6 Advanced Document Settings C Paper/Output D Paper/Output D Paper/Output D D D D D D D D D D D D D D D D D D D | ge Services | |
|---|-------------|--|
| Page Order: Front to Back | | |

• Click **OK** to save settings.

IMPORTANT: The badge printer must already been selected as the default printer.

Setting up the Photo Capture driver

• Right-click on the server icon to get to the Card Exchange menu

| こう なみ | <u>C</u> onfiguration | Printer options | |
|-----------|-----------------------|--------------------|---------|
| | Show print server | Driptor properties | |
| | Stop print server | Photo options | |
| CEX MiniG | E <u>x</u> it | Show card manager | 5:50 PM |
| | | 005815 | Monday |

- Choose 'Configuration > Photo options' from the context menu.
- The *Photo Options* window will open allowing you to choose your capture device.

NOTE: from this window you can also set other related options.

| 🧠 Photo options - [Portrait example] | × |
|--|---|
| Camera Options FaceFind | |
| Iwain sources Video-for-Windows sources | |
| | |
| | |
| Apply these settings to all loaded cards | |
| <u>OK</u> <u>Cancel</u> | |

• Click **OK** to save settings.

IMPORTANT: The photo-capture driver must already be installed.

Creating Badges with Card Exchange Manager

Card Exchange Manager is the badge designer. Some initial setup is required.

STEP-1 Starting the Card Definition Manager

• **Right-click on the server icon** to get to the Card Exchange menu



- Choose 'Configuration > Show card manager' from the context menu.
- The Card-Definition Manager window will open allowing you to set up your badge design templates.



- You can change the order of the list using the **move up** and **down** buttons.
- You can edit an existing template or add a new badge design.
- You can check any template you want to show up in System Galaxy's badge design list. Unchecking a template will not delete it, but it will not be available in System Galaxy.

NOTE: there are predefined templates in the list. These templates are "checked" by default and may be included when you import badge designs into the System Galaxy software if you leave them "checked". These can be used as starting templates for your badges and you can rename them as you like. You can also delete them from System Galaxy after an import, if you desire.

STEP-2 Adding a Badge Design via Card Definition Wizard

- Start the Care Manager as described in the previous step. If the print server is not running on the icon you must start it from the System Galaxy toolbar button.
- click [ADD] button on the Card-definition manager window to open the Card Definition Wizard window.

CREATE A BADGE DESIGN NAME

- Type a descriptive name for your new template
- Click **NEXT** to continue.

| 🕨 CardExchange® User Guided Wizard - Add a new card 🛛 🛛 🔀 | | | | | |
|--|---|--|--|--|--|
| CardExchange [®] Professional Card and Print Manager | Welcome to the new-card wizard of CardExchange®. Please provide the name that will be used for the template definition. This name will appear as a selectable button in the CardExchange® main interface. If you want to group your templates into to categories, you can also specify a category | | | | |
| 10110 Doc. | Provide a name for the template: | | | | |
| | Employee Badge | | | | |
| | Optionally, provide a category too: | | | | |
| | | | | | |
| | | | | | |

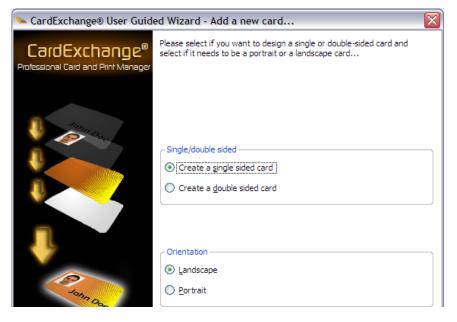
CHOOSE TO CREATE THE BADGE VIA THE WIZARD

- Select 'Use STEP by STEP wizard'
- Click **NEXT** to continue.



SET UP THE BADGE TYPE & LAYOUT

- Select the type of card (SINGLE-SIDED or DOUBLE-SIDED as desired)
- Select the orientation of the badge (Landscape vs. Portrait as desired)
- Click **NEXT** to continue.



CHOOSE THE DATABASE CONNECTION (MANDATORY)

- > You MUST select 'YES connect to a database' (REQUIRED)
- Click **NEXT** to continue.



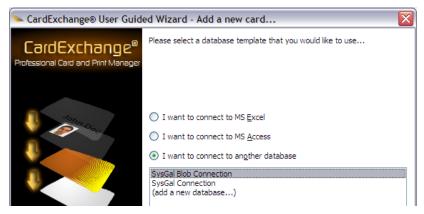
- Select 'Connect to another database' (MANDATORY)
- Highlight the connection type (MANDATORY) you can choose one of the connection types as desired. You must select one of the two options listed.
 - "SysGal Blob Connection" (TYPICAL)
 - SysGal Connection (optional)

NOTICE: if you are not capturing photos in Galaxy cardholder enrollment, then choose the typical Blob connection type.

NOTICE: SysGal Blob Connection is the typical choice. System Galaxy is configured to store the main photograph as blob data.

You can set SG to use photograph_filename in Galaxy's System Settings if you do not wish to store blob data/ or if database size is a consideration for your system. If you upgraded from an older system that did not use Blob data, you can use the Synchronize Utility in Galaxy to convert your photo files to blob data.

• Click **NEXT** to continue.



ADD DESIRED DATA FIELDS TO THE BADGE

 "check" the combine first/last name (shortcut) if you wish to always have these fields on the badge.

NOTE: If you are enrolling the first and/or middle names in Galaxy, but do not want them displayed on the badge, then do not check this option. Instead use the listview to locate FIRST and/or LAST names and check them individually.

- "check" each individual field that you wish to add to the badge;
 - Department, Employee ID, DOB, etc.

IMPORTANT: DO NOT check the MainPhoto from this list.

• Click **NEXT** to continue.



ADD A PHOTO / SIGNATURE TO THE BADGE (OPTIONAL)

• "check" the Add a Photo if desired and select 'MainPhoto'

NOTE: you can leave this unchecked if you are not actually using photos for this badge.

• "check" the Add Signature if desired and select it

NOTE: you can leave this unchecked if you are not actually using signatures for this badge.

• Click **NEXT** to continue.



ADD A BACKGROUND IMAGE TO THE BADGE (OPTIONAL)

- Choose a background color or image as desired (if you choose neither, the background will be white. You can add an image later if you desire).
- Click **NEXT** to continue.



ADD A LOGO TO THE BADGE (OPTIONAL)

- Choose a LOGO image as desired (you can add an image later if you desire).
- Click **NEXT** to continue.



ADD A BARCODE TO THE BADGE (OPTIONAL)

- "check" the 'Add Barcode' only if desired
- Configure the options as needed for your barcode implementation
- Click **NEXT** to continue.



AUTO-START THE DESIGN EDITOR AFTER WIZARD COMPLETES

- "check" the 'START DESIGNER' option to allow for adjusting your layout
- Click **FINISH** to continue.

| 노 CardExchange® User Guid | ed Wizard - Add a new card 🛛 🕅 |
|--|---|
| CardExchange® Professional Card and Print Manager | Congratulations! You have finished the 'Step by Step' setup wizard |
| | When you click on Finish, the card template will be created and the Designer will start and will show you the result |
| 1000 and | Use the toolbar in the designer to add objects like text, lines, shapes, and other objects to your card layout |
| | When the designer is started, you can press F1 or select Help from the Help menu for more information |
| Forn Dec | ✓ After Finish, start the Designer for modifying the layout |
| | |
| | Qancel < Back |

ADJUST LAYOUT OF FIELDS ON THE BADGE

After the Editor opens, you can see that the fields you chose are automatically populated on your badge layout.

• Use your mouse pointer to grab the fields and move them around, arranging them on the layout as desired.

NOTICE: You can map the picture object to a default image as desired. The "default image" will print if a main photo is not saved for a cardholder. If you do not map a default image and no main photo is saved, then nothing will print for the Photo field.

• To set a default image for the photo field, right-click the photo and click the folder button and browse to the default image.

| 🏏 Data picture ob | ject 💶 🗆 🛛 |
|----------------------|----------------|
| Mapping <u>n</u> ame | Photo |
| Default image | 🖻 🖻 🛍 🎽 💽 Crop |
| | <u> </u> |

- **SAVE YOUR CHANGES !!!**.
- You can close the Designer using the File menu to exit. Close the Card Definition Manager if you do not wish to make another template.

| | ardExchange Designer - Employ | e Badge.ced | |
|------------------|--|---|---|
| _ | <u>E</u> dit <u>V</u> iew <u>T</u> ools <u>H</u> elp | | |
| D | ൙ 🔛 🚑 🖪, 🖄 👗 🖻 🕻 | 😻 🗠 🗠 🖾 🔁 🖼 🗰 職 田 🖌 100% 🖌 🗖 🗆 🗖 🗖 💭 🦢 | ∠ == - |
| | • | B I U Tr A Z ※ 画 画 画 | ᄟᅟᅇᅆᅕᆍᇊ ᄪᆞ |
| ab | Front | | |
| 2 | Card | · 1 · 2 · 3 · 4 · 5 · 6 · 7 · 8 · 9 · 10 · 11 · 12 · 13 · 14 | Variables Functions |
| ₽ ₩ ₩ ₩ | O Front Photo ACTIVE_DATE CARDHOLDER_TYPE_ CANDHOLDER_TYPE_ ODMMON_ID Department DOB | [ACTIVE_DATE] [CARDHOLDER_TYPE_ID] [COMMON_ID] [Department] [DOB] | Variables Custom variables Custom variables |
| | FIRST_NAME LAST_NAME | [FIRST_NAME] | → f DOB → f FIRST_NAME → f LAST_NAME → f LAST_NAME → f Date - f Date - f Time |
| | | | |

STEP-3 Importing the New Badge Design into Galaxy

In System Galaxy, you must import the badge designs from the Card Exchange Badge Designer screen.

IMPORT THE BADGE DESIGN INTO GALAXY

- Open System Galaxy and login as a master operator.
- From the menu, select **Configure > Cards > Badge Layout Designs**.
- ► In the Badge Layout window, click the [Import Card Definitions] button and wait for System Galaxy to import the list of templates available. The card definitions you created and that are checked in the card definition list (see previous steps) will appear in the list.
- The customer field is used for systems running the Galaxy Web Module. You only need to set this if you are defining customers. *NOTE: the customer must be defined in System Galaxy before it is available for use in this field.*

Refer to the System Galaxy Software Manual for information on how to assign and print badge templates to cardholders – found in chapter 17 of the Software Manual.

| 🕲 🏥 🕮 | |) 🖓 💛 🔜 I 📶 🖣 | | | | | |
|--------------|---------|----------------------|----------|-----------|----------------|---------------|---|
| Alarm Ev | ents 📔 | Biometric Lab [2] | Vstation | L3 Alarn | n Panel Events | Badge Designs | × |
| Number: | 11 | | | | Add New |) | |
| Description: | WorldT | our | | ✓ | <u>E</u> dit |) | |
| | | | | | <u>D</u> elete |) | |
| | | | | | Apply | | |
| | | | | | <u>C</u> ancel | | |
| | | | | Import Ca | rd Definitions | | |
| | | | | | | | |
| C. Suntann (| C | | X | ~ | | | |
| C System (| Jalaxy | | | | | | |
| | Badge i | names have been impo | rted. | | | | |
| | | ОК | | | | | |

STEP-4 Assigning a Badge Design to a Cardholder

In System Galaxy, you must assign the badge design to the cardholder in the Cardholder screen.

ASSIGNING THE BADGE DESIGN TO THE GALAXY CARDHOLDER

- Open System Galaxy and login as a the appropriate operator.
- From the menu, select **Configure > Cards > Cardholders**.
- Select the Card/Badge Settings tab
- After configuring the name, card ID and necessary access privileges, choose the desired badge design from the BADGE DESIGN droplist.
- Click APPLY to save settings
- Once you save the cardholder, you can PREVIEW or PRINT the badge from the Cardholder screen

| NESBIT, JOSEPH | Find Record | Add New | 2elete <u>A</u> pply <u>C</u> an |
|-------------------------------------|--|--|---|
| Record ID | Personal Card/Badge Settings Data Fi Select Card Card 1 | elds 1 Data Fields 2 Photo Badging A | larm Panel User / LCD Message Note |
| Record Type | Card Data Card Description Card 1 | Card Options Card Disabled Card Reversed PIN Exempt | Loop/Cluster Settings Edit Loops Authorized Loops |
| Last Name STAFFORD First Name | Card Technology Galaxy Standard Card Code | Duress Enabled Passback Exempt Active Date 8/11/2011 | Biometric Lab [2] Access Profile |
| JOSEPH Middle Name | 4194243296 PIN Card Role Access Control | Expire Date | Select Access Groups ** UNLIMITED ACCESS ** ** NO ACCESS GROUP ** |
| Phone | Fingerprint Data | Badge Settings Badge Design Employee Badge | ** NO ACCESS GROUP ** ** NO ACCESS GROUP ** |
| Department | V Send To Reader(s) Base # 00 V User ID: | Print Preview Print Limit Print Count 0 0 Last Printed | Defer to Server for Access Decision Never Defer to Server Action if Server Does Not Reply: Follow Panel Decision |
| | | | |

Editing Badges with Card Exchange Manager

Card Exchange Manager also allows the user to manually edit badges without using the wizard. This is beneficial if you only need to make small changes after creating the badge through the Wizard.

• Right-click on the server icon to get to the Card Exchange menu



- Choose 'Configuration > Show card manager' from the context menu.
- The Card-Definition Manager window will open allowing you to set up your badge design templates.
- Click EDIT for the badge you wish to edit.



SETTING THE DATABASE CONNECTION FILE

- You should already see the Database Connection file for the System Galaxy database called "SysGal Connection.dtd".
 - If you need to change the connection values such as the name of the database or the login and password, etc., you can click the EDIT button.
 - If you located your connection file elsewhere you can use the [...] browse button to locate to the file.

| Definitions | | |
|---|--------------------------------|--|
| | | Card visible notes |
| | | |
| | | Used [0] of [70] characters |
| Layout and magnetic encoding | | |
| 😵 🗹 Do you want to define a card layout? | (type a file name) | Create Edit |
| Do you want to enable printing? | Print front | Rotate front |
| Do you want to enable magnetic encoding? | Print back | Rotate back |
| | | сона то рижог аз Бклар |
| Database connections | | |
| 🥥 🗹 Do you want to connect to a database? | SysGal Connection.dtd | Create Edit |
| Contactless encoding | | |
| Do you want to enable contactless encoding? | Do you want to put the card or | n the smart-card reader manually? |
| Do you want to read data from MIFARE Classic? | | Create Edit |
| Do you want to write data to MIFARE Classic? | | Create Edit |
| Do you want to read and/or write from MIFARE DESFire? | | Create Edit |
| External plug-ins | | |
| Do you want to use external functions or plug-ins? | | Edit |

OPENING THE BADGE LAYOUT SCREEN (DESIGNER)

- You must **type a name** for your new badge template into the name field.
- Check only the options that apply to your card printing/printer setup. Uncheck those that do not apply.
 - Enable printing (this should be checked)
 - Enable magnetic encoding (only for mag-stripe)
 - Print front (this should be checked)
 - Print back (if you are printing the back)
 - Print back first (if your printer setup requires this)
 - Rotate front
 - Rotate back
 - Send to printer as a bitmap (file format .bmp)
- Click the [Create] button to open the designer.
 - If you need to change the connection values such as the name of the database or the login and password, etc., you can click the EDIT button.
 - If you located your connection file elsewhere you can use the [...] browse button to locate to the file.

| Definitions | | |
|--|----------|---|
| | | Card visible notes Used (0) of (70) characters |
| | | |
| | | |
| | | |
| | | |
| Layout and magnetic encoding | | |
| Layout and magnetic encoding | EMPLOYEE | [] Create Edit |
| | EMPLOYEE | Create Edit |
| 😵 🗹 Do you want to define a card layout? | | |

USING THE BADGE LAYOUT SCREEN (DESIGNER)

The badge layout screen has several menus, toolbars and panels to help you design a badge:

- 1. Menu bar (you can access the software help from here)
- 2. File toolbar, object toolbar, text format toolbar, layout toolbar
- 3. Tools bar (docked vertically on left side)
- 4. Card object tree panel (panel is docked on left next to the Tools bar)
- 5. Workspace pane (center where the card is displayed)
- 6. Variables panel and Functions panel (where user builds data fields for the card)
- 7. **Context menus** (you can reach the context menus by right-clicking on the objects on the card layout (workspace) or items listed in the card object tree.
- You must add objects to your badge template: these are created from one of two places.
 - the Tools panel: add static objects (static means not connected to the database field – will not change dynamically – will remain the same for all cards with this design (i.e. a background, a logo, lines or shapes, static text, etc.)
 - the Variables panel: add dynamic objects (dynamic means the field is mapped to a database field will change dynamically based on individual cardholder data it will display in the designated position on all cards with this design (i.e. a last and first name, department, card ID, employee ID, etc.)

IMPORTANT: you will decide which fields you need as dynamic fields. These fields will appear in the mapping tab after they are defined. You must have the correct connection file (set up in previous step) in order to link to the database fields you need.

1 & 2 ange Design Tools Help 🗅 🖆 🗟 🙆 🗴 🖄 ங 砲 😻 🖙 여 여 🖾 현 敗 명 🗰 群 田 🔺 100% 🗸 🔲 🗆 🗆 💷 🖄 🧷 D × 1 1 2 1 3 1 4 1 5 1 6 1 7 1 8 1 9 1 10 1 my Y le Card Variables Functions 🪊 🛈 Front Ð 📄 Variables Photo [Name] 🚊 📄 Custom variables Memo1 - $\mathbf{T}_{\mathbf{\hat{t}}}$ fx Name Memo2 [Data1] *f***∗** EmployeeID BarCode1 -[Department] *f*∗ Barcode Memo3 fx Data1 Memo4 ∫ Department 😑 🧰 System variables fx Date fx Time -4 5 4 6

NOTE: enhance dynamic objects with operation you build from the functions panel

WARNING: if you close without saving your changes you will loose your intended settings. The CEX close confirmation message asks you if you want to CANCEL your changes when you close. If you click YES you will dump your changes. See the <u>ExchangeIT Designer Help screens</u> for details on how to create variables with the variable editor. Get to the help from the software menu or from the Windows Start menu >Start > Programs> ExchangIT >System Help

USING THE MAPPING SCREEN (DESIGNER)

The *Mapping tab* is visible after you have added the dynamic fields and saved your card out. Each dynamic field will display with the appropriate options available. The mapping screen allows you to connect or edit the connections has several menus, toolbars and panels to help you design a badge:

- 2. Card object tree panel (panel is docked on left)
- 3. Data object connections editor (appears on right)
- You will notice that the fields that display are based on the type of data object you are selecting from the object tree.
 - a) All objects have a type of data field
 - b) and a database selection droplist
- You can edit additional attributes like truncating leading zeros or formatting options depending on the type of data displayed in the field.
- Click the FINISH button to save changes!

| — | | (| 2 |
|----------|---|---|---|
| Y | 😻 Card Definition Wizard | | |
| | 🔁 Definitions 🦈 Mappings | | |
| | Available card items: | | Type of data to be displayed in the selected card item: Database column |
| | Barcode = [FULL_CARD_CODE (S EmployeeID (Personal number) Name (Name) Photo (Photo) Data1 = (DATA_1 (SysGal)) Department = [Department (SysGal)] | | Database column to be shown in selected card item: FULL_CARD_CODE (SysGal) |
| | | | Date format: Display format Use custom date format: |
| | | | Options Cut leading zeros Force minimum number of digits |

WARNING: if you close without saving your changes you will loose your intended settings. The CEX close confirmation message asks you if you want to CANCEL your changes when you close. If you click YES you will dump your changes. See the <u>ExchangeIT Designer Help screens</u> for details on how to create variables with the variable editor. Get to the help from the software menu or from the Windows Start menu >Start > Programs> ExchangIT >System Help

EDITING THE PHOTO VARIABLE MAPPING (DESIGNER)

In System Galaxy, the *photograph location* for cardholders is stored in the SysGal database.

- A default photo field is created as a part of the installation.
- Once you add the PHOTO variable to the card you can edit it in the mapping field however it is important that you leave the database column value set to 'PHOTOGRAPH_FILENAME (SysGal)'.
- You must also let the Image options to indicate that the 'database column points to the image file. Do not select 'contains image'. SysGal does not store the image it only points the image path.
- It is recommended to use the aspect ration of 3 and 4 as shown below.

Click the FINISH button to save changes!

| 🔷 Card Definition Wizard | |
|--------------------------|---|
| 🖻 Definitions 🖤 Mappings | |
| | Type of data to be displayed in the selected card item: Photo Additional information Database column that contains the image definition: PHOTOGRAPH_FILENAME (SysGal) Image options Image options The database column contains the image data The database column points to an image file Add path Photos Add extension Jpeg image (".pg) Cut leading zeros Force antigering manker of digite |
| | Force minimum number of digits ① ① ① |

WARNING: if you close without saving your changes you will loose your intended settings. The CEX close confirmation message asks you if you want to CANCEL your changes when you close. If you click YES you will dump your changes. See the ExchangeIT Designer Help screens for details on how to create variables with the variable editor. Get to the help from the software menu or from the Windows Start menu >Start > Programs> ExchangIT >System Help

USING THE BADGE DESIGN IN SYSTEM GALAXY

In System Galaxy, you must import the badge design list from the Badge Definition screen.

- Open System Galaxy and login as a master operator.
- From the menu, select **Configure > Cards > Badge Layout Designs**.
- ► In the Badge Layout window, click the [Import Card Definitions] button and wait for System Galaxy to import the list of templates available. The card definitions you created and that are checked in the card definition list (see previous steps) will appear in the list.
- The customer field is used for systems running the Galaxy Web Module. You only need to set this if you are defining customers. *NOTE: the customer must be defined in System Galaxy before it is available for use in this field.*

Refer to the System Galaxy Software Manual for information on how to assign and print badge templates to cardholders – found in chapter 17 of the Software Manual.

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|--------------|------------------------|---------------------|--------------------------------|-------------------------|
| Alarm Ev | ents Biometric Lab [2] | Vstation L3 Alarm F | Panel Events | Badge Designs $~	imes~$ |
| Number: | 11 WorldTour | ~ | Add New | |
| Description: | | | Delete | |
| | | | <u>Apply</u> <u>C</u> ancel | |
| | | Import Card | Definitions | |
| Customer: | | Ý | | |
| | | | | |