

# System Galaxy Addendum

## idProducer Basic On-premises Badging Solution

Installation • Licensing • Setup • Badge Design & Printing

- ◆ Basic License generated by Galaxy for Registered Printers / Print Dispatchers
- ◆ On-Premises Deployment of idProducer using IIS and Web API Server
- ◆ Basic license supports local SG Customers only (not Customer-Subscriptions linkage)
- ◆ Badge Templates are designed in idProducer's Web-Client
- ◆ Badge Templates are imported/synced in System Galaxy
- ◆ Badge Templates assigned & printed in System Galaxy

JUN 2020 | SG 11.6.0 thru Current



# System Galaxy Setup Guide

for

## idProducer

Configuring System Galaxy  
to integrate with a  
3rd Party Web API Solution

Version 11.6 thru Current

This guide covers using idProducer on-premises with the number of printers that are registered from the Galaxy purchase agreement for a Basic License.

Information in this document is subject to change without notice. Therefore, no claims are made as to the accuracy or completeness of this document.

### 3rd Edition

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Revision F

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### Scope

This guide covers the known requirements and instructions related to the Basic License implementation of idProducer (Web API Integration) for a new installation. Information about Advanced License is found in the guide for **idProducer with Advanced License** or the **SG Online Help** site.

- Also see the **Related Guides table** in the Introduction of this guide.
- Also consult the 3<sup>rd</sup> Party documentation for system requirements related to the product.
- Contact Authorized Technical Support for support.

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# Welcome to idProducer On-premises Badging (for Basic License)

This guide provides requirements and instructions for a new install of *idProducer Badging On-Premises solution* for a Basic License scheme. This guide provides instructions to perform product registration, licensing, system configuration, as well as how to use the idProducer app to create badge templates and how to import and assign those templates to System Galaxy Cardholders.



ALSO SEE: the *SG System Specifications Guide* for requirements outside the scope of this guide.



NOTICE: This solution does not support Customer-Subscriptions. See *Advanced License Guide* for Customer support.



REFERENCES: See glossary terms and a list of related documentation in the Appendices of this guide.

## FIRST TIME STARTUP OVERVIEW

After properly installing System Galaxy and idProducer components, the first-time startup is as follows ...

| Advance License Process  | App | Screen   |
|--|-----|--|
| (optional) Make desired updates to SG Cardholder fieldnames  | SG  | System Settings > Cardholder Options tab   |
| Request and install the idProducer License from SpecsID.   | IDP | Done at first log-in into idProducer.  |
| Register SG for “idProducer Badging” and set number of printers *<br>(Note: customer-subscription/customer-mapping is not supported) | SG  | System Registration Wizard (based on purchase order)<br><br><i>Also register the Galaxy client workstations.</i> |
| Create a Badging Operator  | SG  | Operator programming screen  |
| Configure Root Print Dispatchers & Printer(s) at the appropriate server or Client workstation.                                       | IDP | <i>Print Dispatcher Configuration App</i>  |
| Create Badge Templates   | IDP | <i>Web Client &gt; Template Editor (for Root Reseller)</i>   |
| Import/Sync Template Names   | SG  | Badge Design screen  |
| Assign any Templates to any cardholder   | SG  | Cardholder Enrollment screen   |
| Print badges to Root Printer   | SG  | Cardholder Enrollment screen   |
| * Do not Pre-request/preload a license from idProducer. System Galaxy produces the Basic License ID for License functionality.       |     |  |

# idProducer Requirements

These requirements can additionally be used as a troubleshooting checklist but are not intended to substitute for instructions.

## VERSION COMPATIBILITY SERVICES, GATEWAY, IP & PORT SETTINGS)

1. System Galaxy v11.6 (or higher)
2. idProducer must be installed from the Galaxy Install media (USB/ISO)
3. *idProducer supports smart elements such as bar code and mag stripe ...*
4. *idProducer supports single-sided/dual-sided cards, landscape/portrait layouts, and includes an expression builder.*
5. Galaxy supports 2 license schemes – see Licensing Requirements below.
  - **Basic License** = 1 Root Subscription (no link to customers) with the number of Printers according to purchase order.  
Note: Under the *basic license*, SG Customers are supported in SG 11.3 (or higher) and are only associated with the SG Cardholder – they are not linked to the idProducer account. Older systems that want to continue using their existing Customer setup, should contact their authorized technical support to determine the best path forward with either a basic license or advanced license.
  - **Advanced Lic.** = 1 Root and multiple Customer-Subscriptions with corresponding Print Dispatchers and multiple printers.

## INSTALLATION REQUIREMENTS

6. **System Galaxy must be installed before idProducer, but not registered. System Galaxy must be operating correctly.**
  - Launch System Galaxy and sign-in with your master password, but **do not register the system.**
  - As a sanity check, create a *badging test card* by adding a new cardholder and adding a *test access card* and saving the cardholder in the *System Galaxy Cardholder* screen. This test cardholder and card will be your *badging test card*.

7. **Microsoft IIS must be correctly installed before installing idProducer. You should run the *Galaxy IIS Install Helper* utility to verify that ISS is correctly installed and configured to support the Galaxy API interface.**

**NOTE:** You can launch the *Galaxy ISS Install Helper* utility by clicking the “Install IIS Web Server” link on the *Galaxy Installer App*. This utility detects whether ISS is correctly installed. The utility will display the [Install ISS] button only if IIS is not correctly installed. Otherwise, the utility displays a *hyperlink* to connect to IIS Home Page (local host).

8. **idProducer must be installed and the idProducer database must be published before you Register System Galaxy.**
  - **IMPORTANT:** Do not try to request a license from the idProducer web client sign-in page if you are using the basic license solution. The *basic license* is generated by System Galaxy in the *SG System Registration* screen when you register for the *idProducer Badging solution*.
9. The Web API Service must be running. And as a sanity check, you must be able reach the *swagger* page for proper operation.
  - <http://localhost:8000/swagger>
  - <http://X.X.X.X:8000/swagger>

# System Installation

This section covers the installation of IIS Server and idProducer software, as well as publishing the idProducer database.

## IIS Server Installation Process

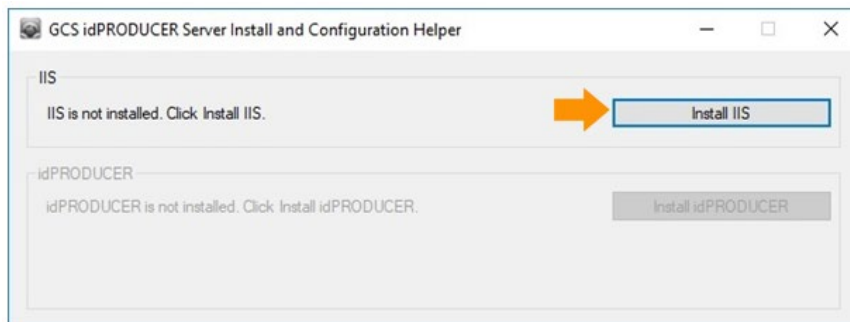
This section describes how to install IIS Server on the System Galaxy Web Server using the *GCS Install Utility*.

### NOTES

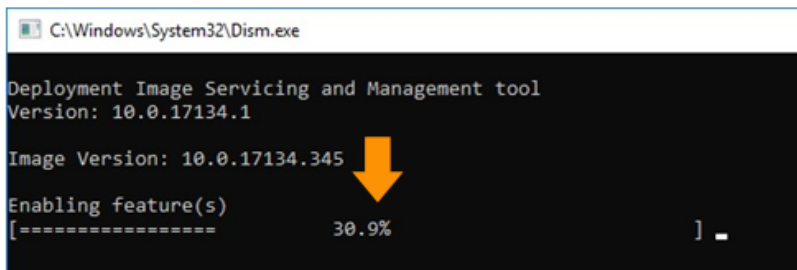
- Do not try to install idProducer before installing and validating the IIS Server installation.
- The GCS Install Utility is launched from the System Galaxy Installation media (USB/OSI). This utility will ensure all the IIS server settings are correctly configured to support the idProducer web app.

1. Load the System Galaxy Installation media (USB/ISO) and double-click the **SGStartup.hta** file to open the SG Installation splash-screen.
2. From the splash screen, click the **Install IIS Web Server** option. The *IIS Install Utility* will detect whether ISS is installed and will prompt the user to Install IIS if needed.
3. Click the **Install IIS** button to install the ISS Web Server on the computer. (grayed buttons are or not available)

Note: If IIS already installed, the Install IIS button will not be available. You can proceed to next section if IIS is already installed on the Galaxy Web Server.



4. Click **YES** on the Windows UAC prompt to proceed with install, as needed.
5. A window will open showing the progress of the install.



6. Click the <http://localhost> link to verify IIS Server home page will load in your default browser.
- INSERT PIC HERE

**IIS SERVER IS COMPLETED - PROCEED TO IDPRODUCER INSTALLATION**

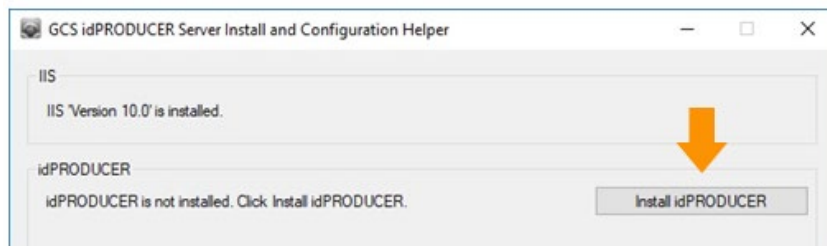
## IdProducer Installation Process

This topic covers how to install idProducer software and print dispatcher (complete) on the web server and client, using the GCS idProducer Install Utility.

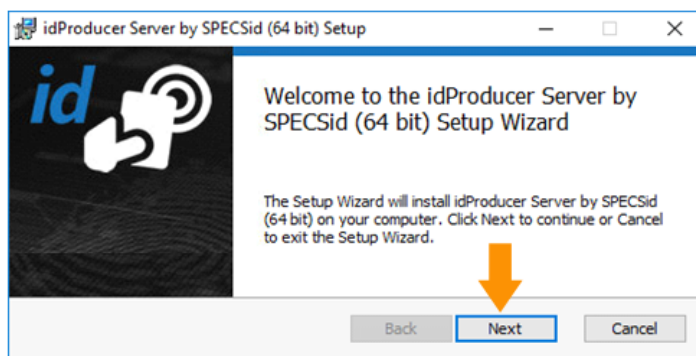
### PREREQUISITES

- IIS Web Server must already be installed before you install idProducer. See IIS INSTALLATION in the prior section.
- The idProducer installer will automatically launch the IDP Configuration Manager at the end of its process. Do not close it, but proceed to the next section to continue with the database install.

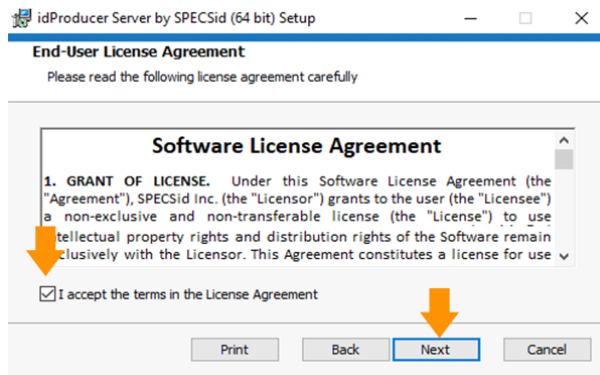
1. Click the **Install idProducer** button to install the idProducer client-server software.



2. When the idProducer Setup Wizard launches, click **Next** to proceed through the screens.

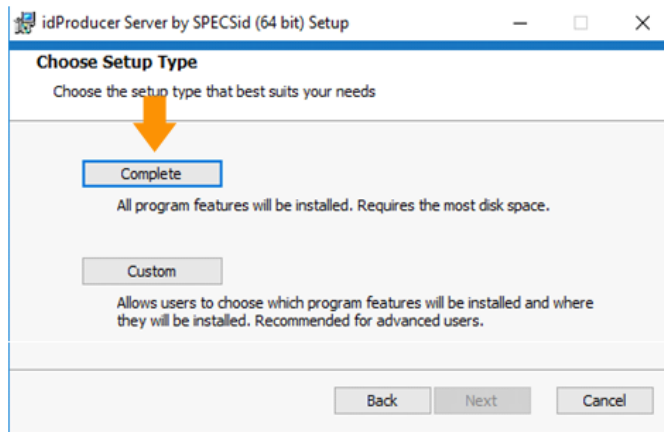


3. Check the EULA Agreement and Print as needed. Click **Next**.

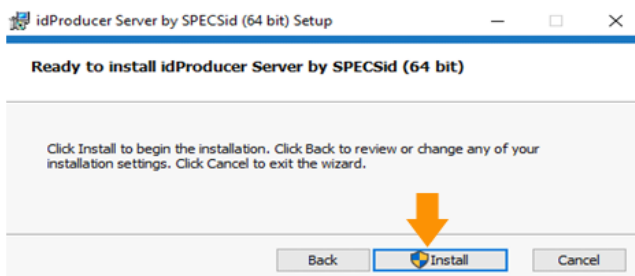


4. Click the **Complete** button in the Setup Type screen (recommended as standalone install).

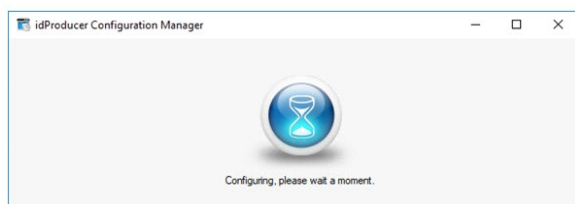
Note: Choosing Custom allows the user to perform a distributed installation of the Print Dispatcher and Capture Handler on a workstation.



5. Click the **Install** button to start the installation.



6. Click **Finish** when prompted. The *idProducer Configuration Manager app* will automatically launch.



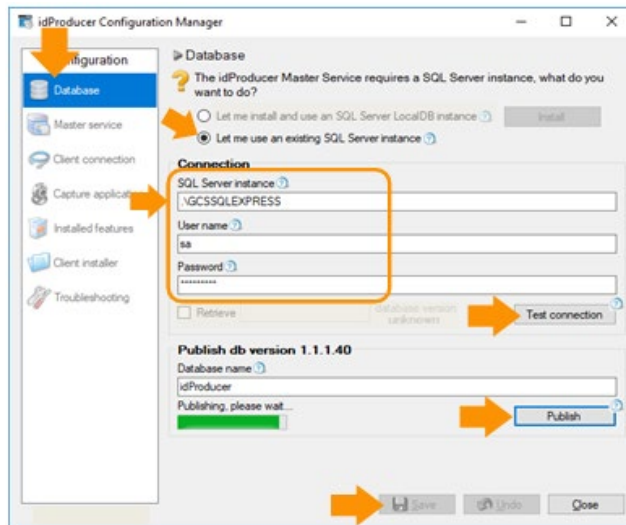
**PROCEED TO PUBLISHING DATABASE NEXT**



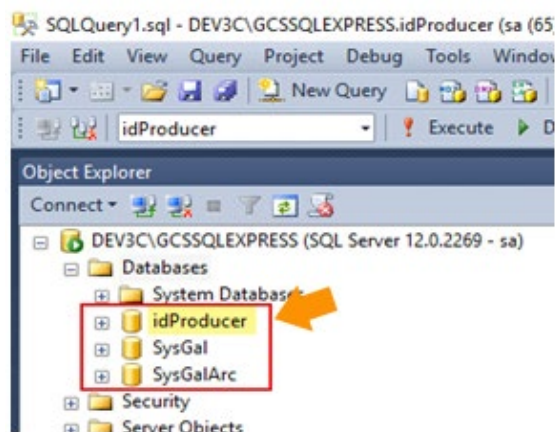
## Publishing the IdProducer Database

This topic covers publishing the idProducer database to the existing MSSQLEXPRESS Server instance that was installed for the System Galaxy Databases (done during Step-2 from the install media (USB/ISO) ).

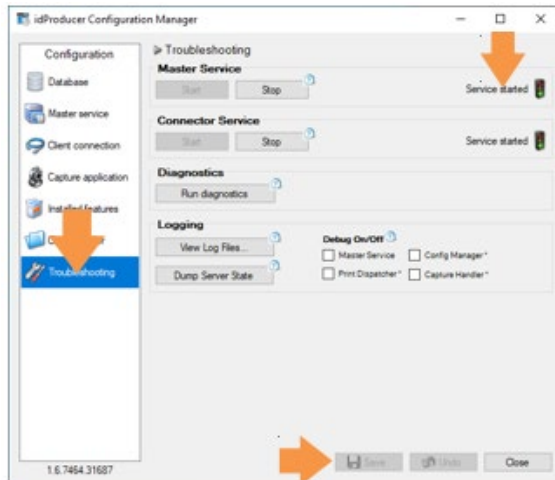
1. The **idProducer Configuration Manager** opens to the Database screen ...
  - a. Choose the “use existing SQL Server instance” option.
  - b. Enter the **path and name** of the SQL Server instance (i.e. “.\\GCSSQLEXPRESS”)  
(note: you can use the machine name or IP address of the database server instead of the dot “.”)
  - c. Enter the **username** “sa”
  - d. Enter the correct sa **password** (the default is GCSSa5560” although you should have entered your unique password during the System Galaxy install Step-2).
  - e. Click **Test Connection** button. Click OK when connection is successful.
  - f. Click the **Publish** button to publish the idProducer database.
  - g. When the database has been published, click OK when successful



NOTE: The database is installed in the GCSSQLEXPRESS INSTANCE as seen below in SQL Studio Manager application.

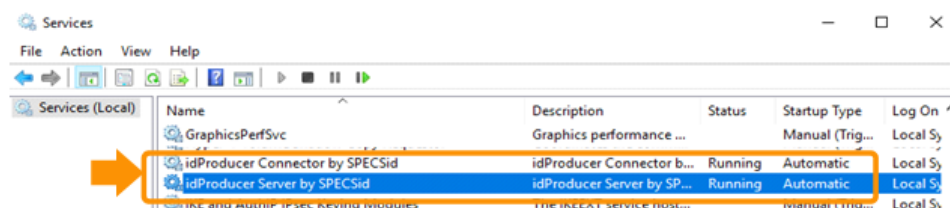
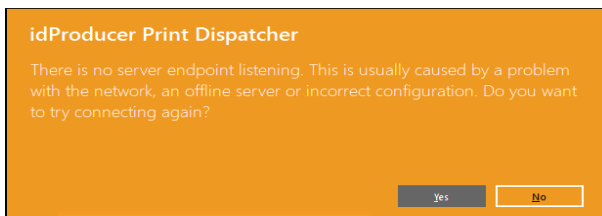


2. On the Troubleshooting screen ...
  - a. make sure the **Master Service** and **Connector Service** are started (green light)
  - b. (optional) Check the desired Logging options
  - c. Click **Save** button to save any changes and then Close.



NOTE: If the Configuration Manager throws an error that logging could not update due to “no endpoint listening” and the Master Service stops, this is because you have not yet set up the Master Print Dispatcher (or the Root Dispatcher). Don’t worry about this because you will do this in the next step. Just click OK and re-check the Master Logging box and quickly save the configuration before it flips off. You can manually start the master service after you configure the Root Print Dispatcher.

3. **Reboot the machine.** You may see a message stating “no endpoint is listening” when it restarts,
4. idProducer services should be running and configured to start automatically. *Restart them if needed.*
  - idProducer Server by SPECSid
  - idProducer Connector by SPECSid



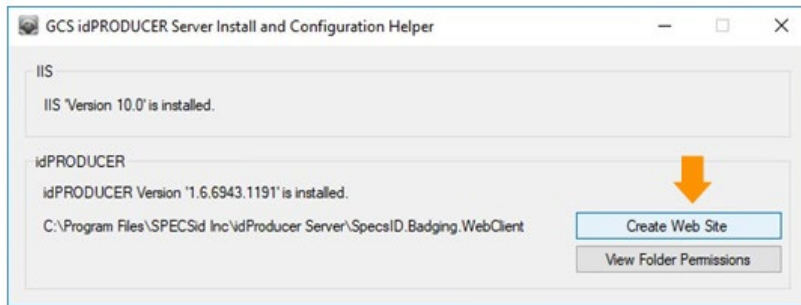
**GO TO CREATING WEBSITE AND FOLDER PERMISSIONS**

## Creating idProducer Website and Folder Permissions

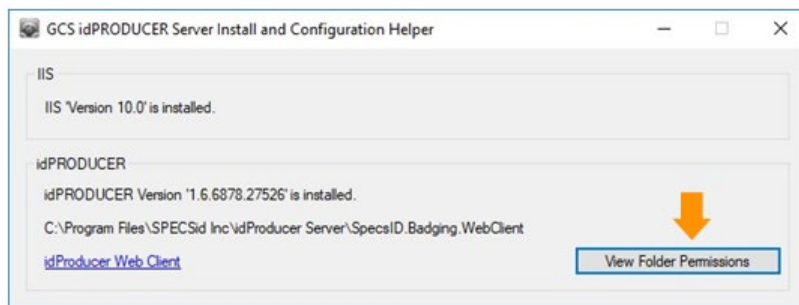
This topic covers using the GCS idProducer Utility to create the idProducer website and folder permissions in IIS on the Galaxy Web Server. This does not need to be done on a client workstation.

In the GCS idProducer Install Helper app, do the following ...

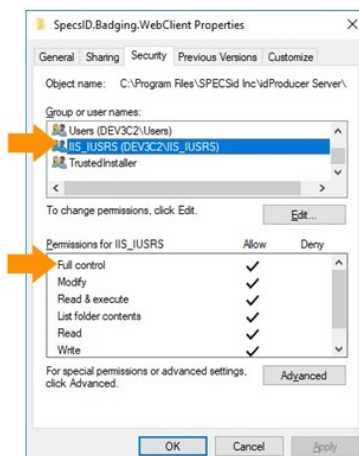
1. Click the **Create Website** button to create the website and folder permissions.



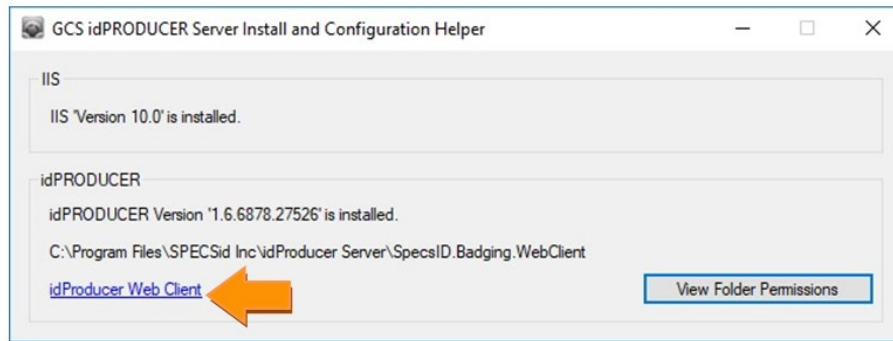
2. Click **View Folder Permissions** button to confirm that the IIS User had “Full Control”.



3. In the Properties window, scroll down and select the **IIS\_IUSRS (your machine name)**,
4. In the Permissions window, confirm that “Full Control” is set to Allow (checked).
5. If for any reason the Full Control permission is not enabled, Edit as needed – then click Apply
6. Click OK to exit.



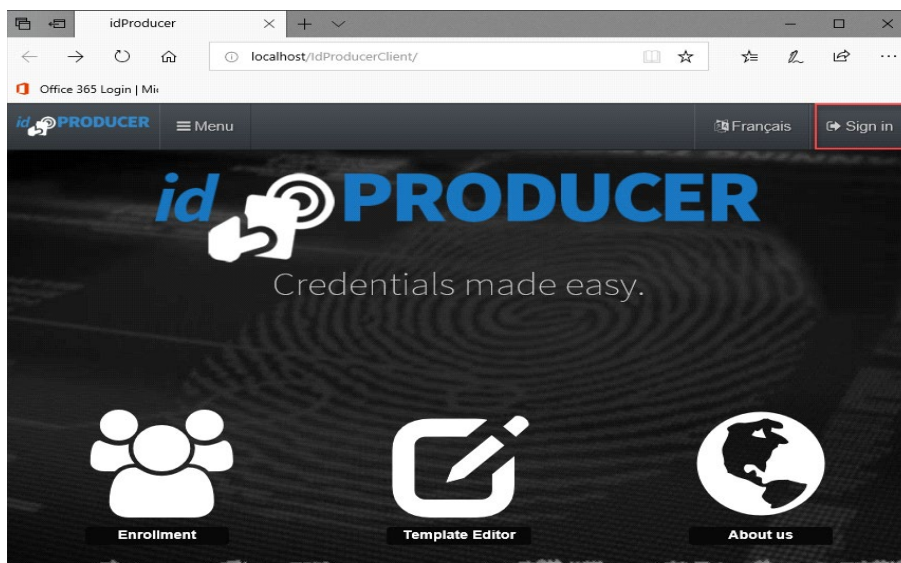
7. Click the **idProducer Web Client** link to verify the idProducer Client has been created.



8. **Do not attempt sign in to idProducer** when the Web Client opens.

You are only verifying that the Client is created and the home screen can be loaded in the browser.

NOTICE: **Do not request a license through idProducer for a Basic License scheme.** System Galaxy produces the basic license during the SG system registration. Any login attempt will result in an error message. See Basic License and Registration for information.



**GO TO LICENSE AND REGISTRATION**

# Basic Licensing and Registration

This topic covers the Basic Licensing of idProducer and Registration System Galaxy for a central server solution.

## SYSTEM REGISTRATION

### PREREQUISITES

- The idProducer installation must be completed before you license the product. See prior sections for details.
- You may not be able to configure or launch the print dispatcher until the Galaxy system registration is complete.
- The GCS Web API Service, idProducer Server Service, and idProducer Connector Service must all be running to register.

1. Launch System Galaxy (SG) from the desktop startup icon and create a master login credential (username and password).
2. Sign-in to System Galaxy with the new master login that you have just created.
3. From the SG menu, choose **Configure > Options > Registration > System (or Wizard)** to open Product Registration screen.
4. Enter the **Customer Name**, **Dealer Name**, and **Phone**, to begin the registration process.

*The name you enter in the Customer Name field will become your Root Site name in idProducer.*

- a) Enter your **Software License key** – a green checkmark will appear if you enter it correctly.
- b) Click the **[Register via Internet]** button – a popup window will open for you to provide your contact information.

screen is cropped

**NOTE:** If you do not have an internet connection, you can register manually by calling authorized customer support.

- c) Enter data into all fields – no fields can be blank, use a space in address line 2 if you do not have a PO Box.
- d) Click the **[Register via Internet Now]** and click **OK** when the “Registration Successful” message box displays. User returns to main *Product Registration* screen. All settings should be prefilled to match purchase agreement.

5. When you return to the *Product Registration* screen, you should take a minute to verify your registration settings.
  - a) Product Level, system settings, reader options, Badge Solution (idProducer) and Printer Count are now configured to match the *customer purchase agreement*.
  - b) Verify the *Software Maintenance Expiration Date* is correct and a *Registration Code* is present.
  - c) Click APPLY button to commit the registration.
6. Click the [View idPRODUCER License] after the registration code is applied to open a message box that displays your basic license level and the number of registered printers for the system.
7. Click **OK** to exit when everything is correct. Changing anything after the Registration Code is applied will require customer support assistance. The code is only good for the exact setting you have validated.

**To Register via Authorized Customer Support:** You will manually set up all the system options, badging solution, and printer count according to the customer purchase agreement. You must enter the *registration code* that Customer Support provides, then click APPLY to confirm and save it.

NOTE: SG creates the Basic-level idProducer license and the idProducer reserved API credentials as well as pushing SG Cardholder fields into the idProducer Root Reseller account in the idProducer database. The Root account will take the name of the Galaxy *Customer Name* in the Registration screen.

The screenshot shows the 'Product Registration' window with the following sections:

- System Registration:** Includes fields for Current System ID (2592754864), Registered System ID (2592754864), Created Date/Time (6/4/2020 11:14:52 AM), Workstation Count (1), Customer Name (CER), Authorized Galaxy Dealer Name (Galaxy), and Dealer Phone Number (18004455560). A 'Register via the Internet' button is present.
- Software License:** Shows a license key: 2JD94 -42369 -GF6HR -GBPGY -63TG with a green checkmark.
- Product Level:** Set to 'Corporate'.
- System-Wide Features:** A list of checkboxes including CCTV Control, Card Data Import/Export/Replication, Event Log Output (RS-232/TCP/IP/File), S.G. Time & Attendance, User Status/Who's In, Galaxy DVR, 3rd Party DVRs, Alarm Panel Support, Guard Tour, Passback & Door Groups, Graphic Device Status, 508 & 503 Support, Biometric Interface Support, Unlimited Card Capacity (600 only), and Access Rule Override (600 only). A 'DVR Limit' dropdown is set to 7.
- Software Maintenance Settings:** Includes Expiration Date (6/18/2020), Maximum Version (11.xx), and Limits for Maximum Clients (5), Maximum Readers (64), and Maximum Biometric Readers (0).
- Web Client Options:** Includes checkboxes for Web Module/LaunchPoint (ASP Model) Support, Photo ID Badge Printing, Web Module Requires Card Exchange, and LaunchPoint Requires idPRODUCER.
- Badge Printing System:** Set to 'idPRODUCER'.
- Maximum Badge Printers:** Set to 4.
- View idPRODUCER License:** A button to view the license details.
- Registration Code:** A field containing 'N/55R4B9' and a 'Report' button.
- Last Registered Date/Time:** 6/9/2020 8:19:11 AM.

At the bottom of the window are 'OK', 'Cancel', and 'Apply' buttons.

**Proceed to Workstation Registration**



## WORKSTATION REGISTRATION

You can also click the [Register via Internet] button to perform an automated workstation registration if internet is available at the customer site. If you do not have internet access, you can contact Customer Support.

1. From the SG menu, choose **Configure > Options > Registration > Local Workstation** (or “next” if using the Wizard).
2. In the Workstation Registration screen: the Software License key will prefill from the System Registration.
3. Enter the first **Product key** for the “Comm Server & Client” from the purchase agreement.
4. Click the **[Register via Internet]** button to complete the registration via the internet.
5. Click **OK** when the Registration Successful message box displays.
6. Verify that all the settings match your purchase agreement.
  - a) *You must have print option enabled to support printing badges.*
  - b) *the Workstation Registration Code is also prefilled.*
7. Click the **[Apply]** button to register the workstation.
8. Click OK to close this screen and restart the software.

NOTE: once registration is complete, you can configure the idProducer Print Dispatcher.

The screenshot shows the 'Product Registration' dialog box with the 'Workstation Registration' tab selected. The 'Local Workstation Registration' section contains the following fields and values:

- Software License: (empty)
- System ID: 2560383631
- Product Key: 1234
- Workstation ID: xRGMW7JR4GX7FN2X9
- Workstation Description: DEV3C2
- Created Date/Time: 1/10/2019 7:05:32 PM
- Last Registered Date/Time: 1/10/2019 7:20:13 PM

Under 'Client/Server Features', the 'Comm. Server & Client' radio button is selected. The 'Badging Features' section, highlighted with an orange box, contains the following options:

- ☒ Photo Capture Enabled
- ☒ Printing Enabled
- ☐ Signature Capture Enabled
- ☐ Fingerprint Capture Enabled
- ☐ Encoding Enabled
- ☐ External Badging (View Only)

At the bottom, there is a 'Register via the Internet' button, a link to 'Visit GCSOnline Web Registration Site', a 'Registration Code' field with the value '5FM45LBT', and a 'Report' button. The dialog box has 'OK', 'Cancel', and 'Apply' buttons at the bottom.

## PROCEED TO CONFIGURE PRINT DISPATCHER

# Configure Print Dispatcher on the Server

This topic covers the first-time startup of the idProducer Print Dispatcher on the Galaxy Communication Server.

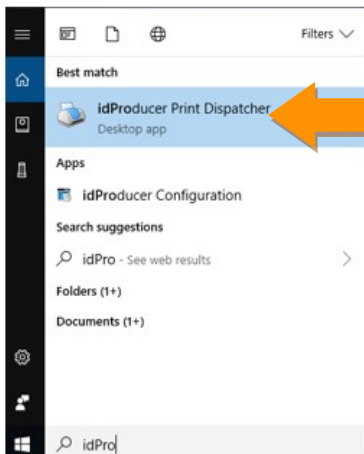
The idProducer Print Dispatcher is installed on the Galaxy Communication Server when the idProducer Installation is performed using the “complete” install option (see previous topic).

If you want a Print Dispatcher to run on a client workstation, you can run the idProducer Installation Utility on a client workstation and choose “custom” install. In this case, you will only install the print components, but not the full idProducer software. See [Installing Print Dispatcher on Client Workstation](#).

## PREREQUISITES

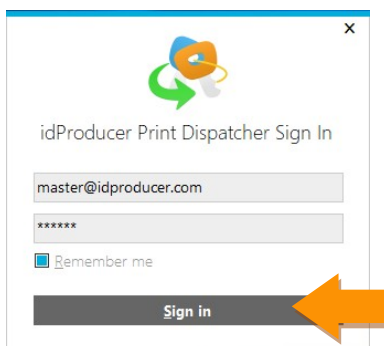
- The idProducer software must be installed
- Before you can set up the Print Dispatcher, you must have completed the System Galaxy product registration, which installs the idProducer Basic License. *See Prior sections to perform the SG Registration.*
- The GCS Web API Service, idProducer Server Service, and idProducer Connector Service must all be running.

1. Launch the Print Dispatcher app by typing *idProducer Print Dispatcher* in the search box of the Windows taskbar.
2. Click on the idProducer Print Dispatcher application when you see it in the list.



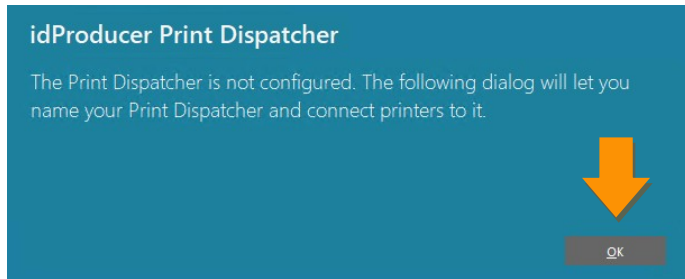
3. Sign in with the default login credentials. (Default login is [master@idProducer.com](mailto:master@idProducer.com) / “master” password).

NOTE: clicking “Remember me” will tell the dispatcher to preserve the master username. You will still need to provide the password each time you start up. NOTE: **You can change the master password as desired.**

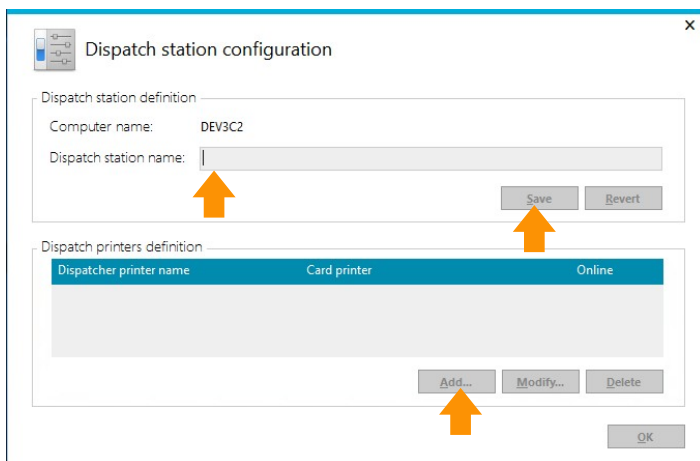




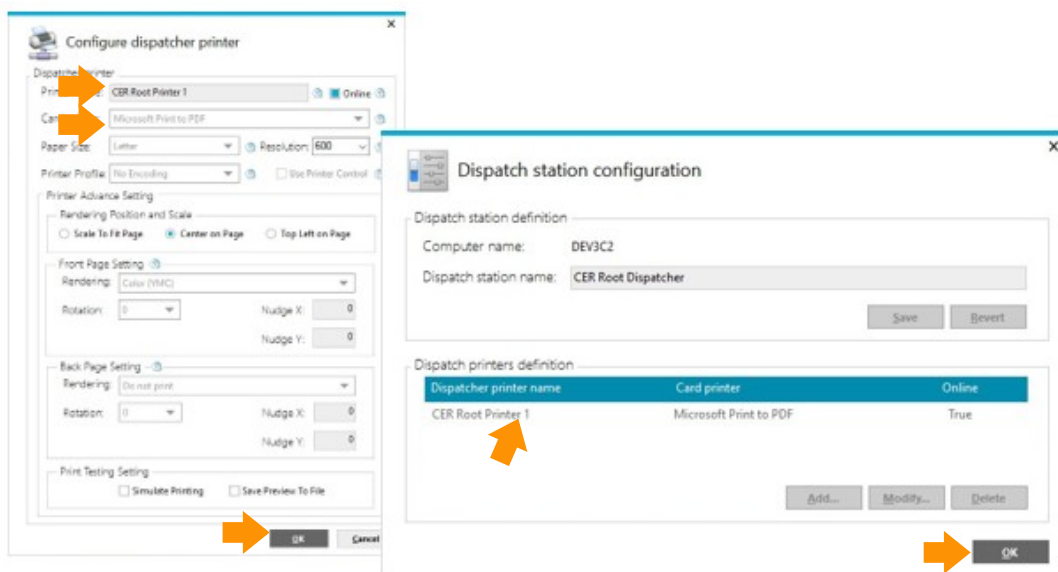
- Click OK when the **Print Dispatcher** starts up the first time.  
This message prompting you to name your dispatcher and connect it to printers.



- Enter a Dispatch Station Name ... like *Main Dispatcher*.  
Note: Under a Basic license this is the only Dispatcher you will have. All operators will be able to see this dispatcher and its printers as long as the operator profile has been assigned the correct privileges in the System Galaxy Operator profile.
- Click **SAVE** to the Print Dispatcher, then click **Add** to configure a badge printer.



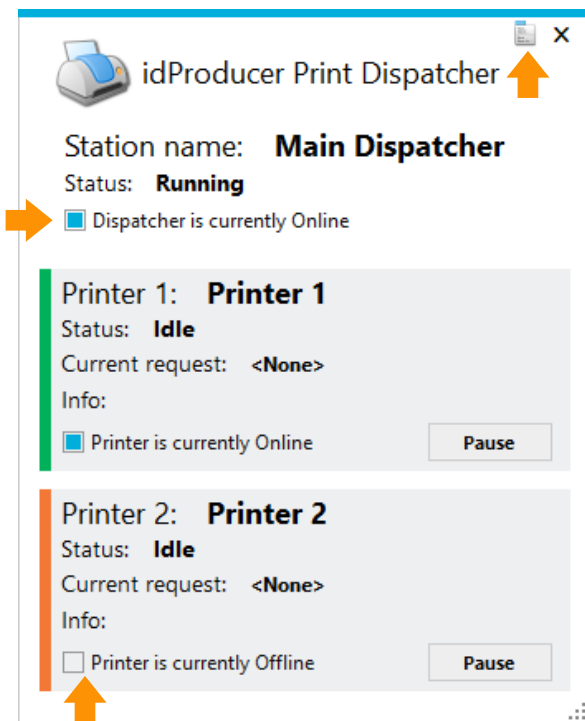
- In the Configure Printer screen, **enter a unique name** to identify the printer.  
This name will appear in System Galaxy so the operator can identify the desired printer.
- Select the **Card Printer** (brand/model) and configure all the appropriate printer settings.
- Click **OK** and the printer will be added to the list of *defined printers* in the Dispatch Station screen.



## HOW TO USE THE PRINT DISPATCHER

### NOTES

- Only one instance of a Print Dispatcher can run per PC.
  - Offline printing occurs when the SG Operator sends or queues a badge to a printer or to the dispatcher when it is not running.
1. You will launch the idProducer **Print Dispatcher** on the the main server by typing “idProducer Print Dispatcher” into the search field on the Windows task bar.
  2. The offline/pending print jobs will be automatically printed when the Print Dispatcher starts and is logged in, provided the services are running and the printer is online. Offline jobs take priority over live requests. Any jobs that are on “hold” will not print until released.
  3. To print a badge, the SG Operator will send the badge to a printer from the System Galaxy cardholder screen. If the printer is offline, the badge print will be added to the idProducer **print request queue**.
  4. The SG Operator can also send a badge to the **Print Dispatcher Queue** if the printer is not online. These print jobs will be handled by a **Dispatch Operator** by choosing to open the Print Request Queue from the Dispatcher Menu (icon in the top right corner).
  5. The Dispatch Operator can print, hold or close any queued jobs. The dispatcher can also assign a job.
  6. The Print Dispatcher window will display the current online status of the Print Dispatcher (online vs. offline) This window also shows the printer status and activity (online v. offline; and idle v. printing).
  7. User can pause/resume the Printer from the Print Dispatcher window, as needed.



# Creating Badge Templates in idProducer Client

This topic covers creating a badge template at the Root Reseller account under the Basic License scheme. All badge templates will be available to all cardholders after the *badge import* is performed.

## Note for systems using SG Customers:

Under the idProducer Basic License scheme, System Galaxy (SG) Customers are independent of badging functions. If your system uses SG-Customers, they are only assigned to the cardholder. Customers are not assigned to badge templates or badge printers and will not filter their drop-lists.

## General Process:

1. Update the Card Template fields with SG Cardholder Fields – from SG (done by registering the system)
2. Create the Badge Template in idProducer using SG Cardholder Fields
3. Import the Badge Templates into System Galaxy through the Badge Designs screen.

## About Updating Card Template Fields

NOTICE: Although idProducer comes with 11 proprietary **Card Template Fields**, they cannot be used to design badges. The SG *Cardholder Fields* must be pushed/inserted into idProducer before any badge templates can be designed and imported.

## Updating Root Reseller Template Fields

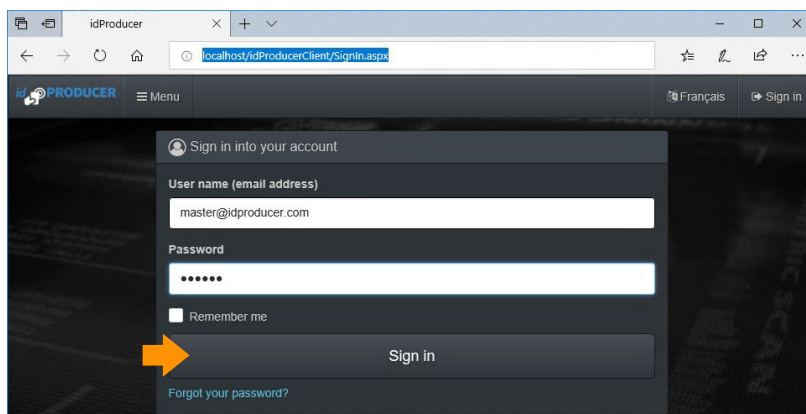
System Galaxy will automatically update the Root Template Fields with *SG Cardholder Fields* when the SG software is registered or when the system is restarted. When the SG operator signs in, SG automatically pushes its cardholder fields into idProducer's Template table and removes the 11 proprietary fields to avoid conflicts.

## CREATING BADGES

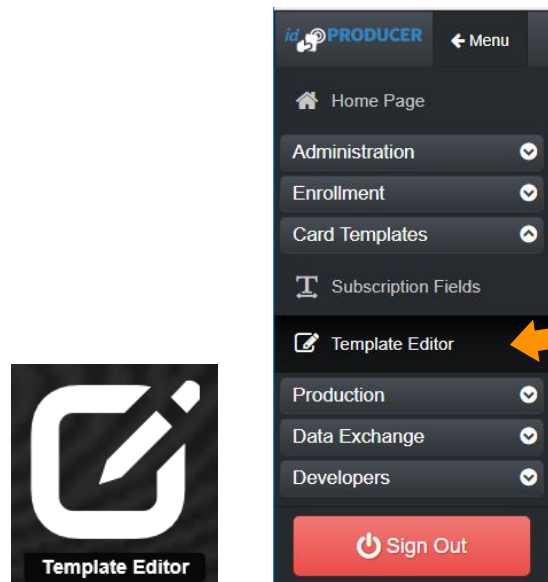
The Root Subscription is automatically synchronized each time System Galaxy software is restarted/re-launched. Or user can IMPORT/SYNC BADGES from the SG Badge Designs screen.

1. Login to idProducer using the idProducer credentials if you want to create a Card Template (i.e. Badge Design).

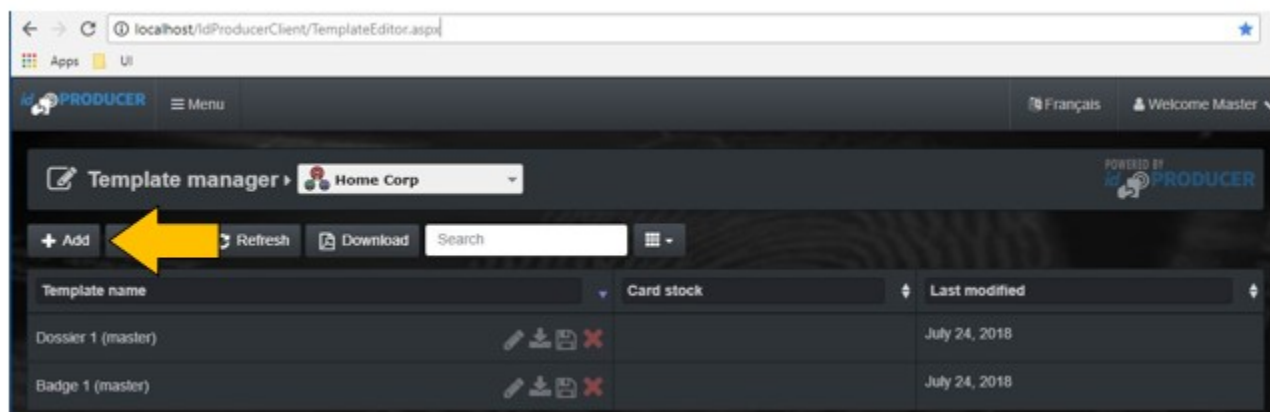
NOTE: With a basic license, all templates are created under the Root Site. Subscriptions are not supported under a basic license.



2. There are two ways to open the Template Editor ...
  - a. **Click the *Template Editor* tile** on the idProducer home web page.
  - b. or open the Template Editor from the **Menu > Card Templates > Template Editor**



3. The Root Site will be selected by default in the Template Manager droplist (basic license).
4. Click ADD to start designing a badge template.



5. Enter a unique Template Name for your badge template (something easy to identify)
6. Enter a short description for clarification.
7. Chose your card stock.
8. To create consistency in badge appearance or ensure you always use the same layout or logos, etc, you can set this template as a default layout and copy it for other badges. Then change only the things that should be unique.
9. Access or card/badge expiration is controlled within the System Galaxy Cardholder Card settings. The expiration fields in this screen do not transfer or relate to the SG activation or expiration of Access Control permissions.
10. Click ADD button to open the Template Editor screen.

**Add card template**

**General Information**

Template name \*  
Engineering Dept

Description  
Employee Badge

Card stock

**Card Creation Options**

☐ Set as default template when creating new individuals

Card Expiry Date is creation date with  Days  Months  Years added.

**Add** **Cancel**

11. First you will see a properties box that allows user to choose different card sizes, and choose the image layout (landscape or portrait), and set whether the card will print single or dual sided (front and back). User can also configure a margin to accommodate the punch and any badge casing or protector so that the image is not obscured.
12. CLICK OK TO CLOSE AND CONTINUE TO THE DESIGN CANVAS

**Template settings**

Card template:  
CR80

☒ Dual sided

**F** Front ☒ Landscape ☐ Portrait

**B** Back ☒ Landscape ☐ Portrait

Units

Surface width

Surface height

Margin left

Margin top

Margin right

Margin bottom

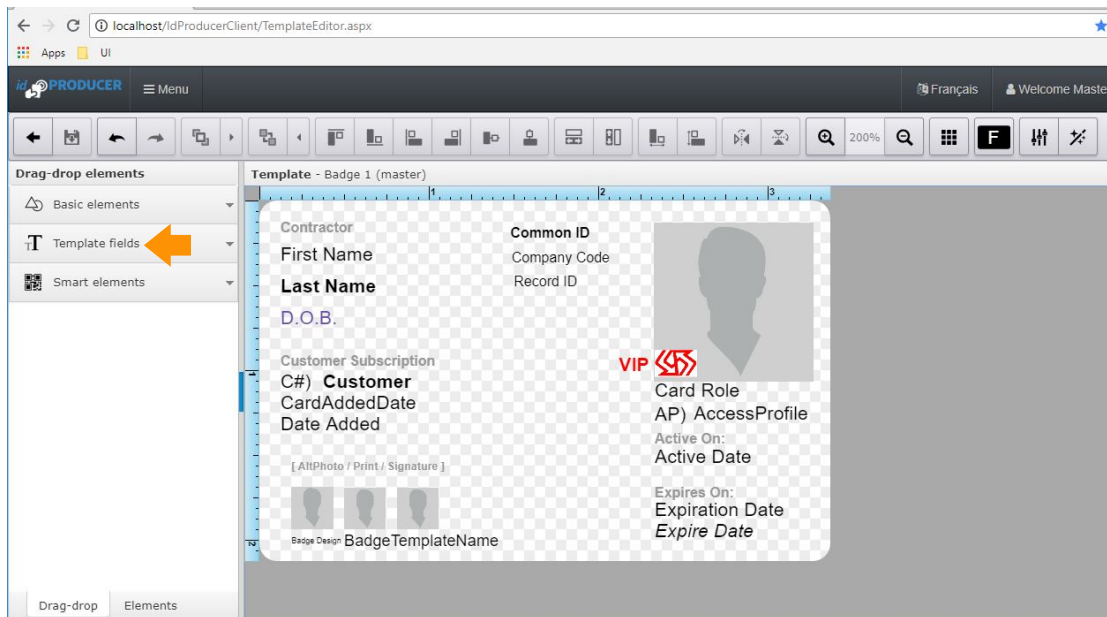
Grid size

Editor version 1.1

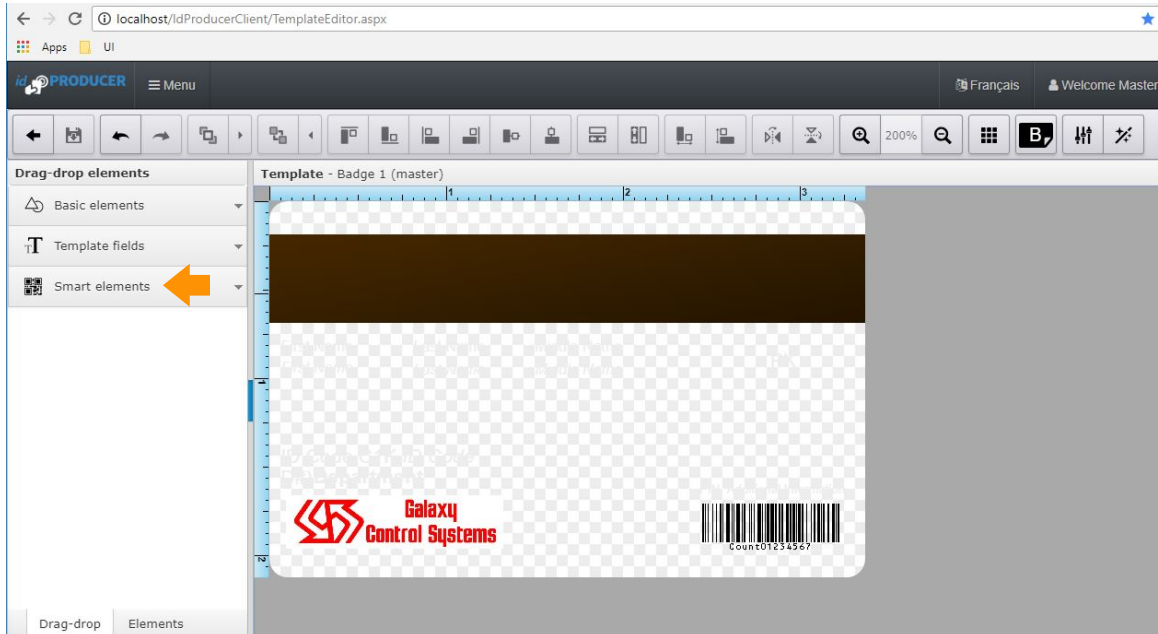
Template version 1.1

**OK**

13. When the design canvas appears, begin creating the badge by adding Cardholder fields to the template.
14. Expand the Template Fields panel to see the Galaxy Cardholder Fields. Simply drag-n-drop the desired cardholder fields onto the card canvas.



15. Expand Smart Elements panel to see the bar code and magstripe fields. Simply drag-n-drop the desired smart fields onto the card canvas (back).



16. Save your badge design.
17. Now you are ready to import badge templates into System Galaxy.

# Managing Badges in System Galaxy

Under the Basic License, all badge templates are under the Root Site and are available to all cardholders after the badge import is done.

## NOTES

- You must have created the badge templates in idProducer before they can be imported.
- You must import/synch badges before they can be assigned and printed.

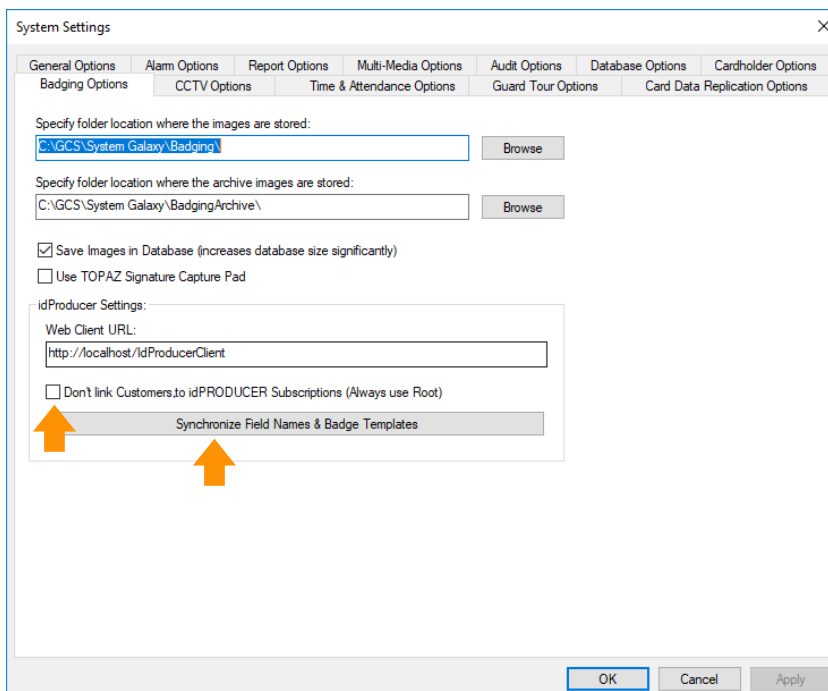
## Importing/Syncing Badges in SG

Badges are imported or synced after they have been created.

- You can import/synch from the Badge Options tab in System Settings.
- You can import/synch from the Badge Design screen in SG.

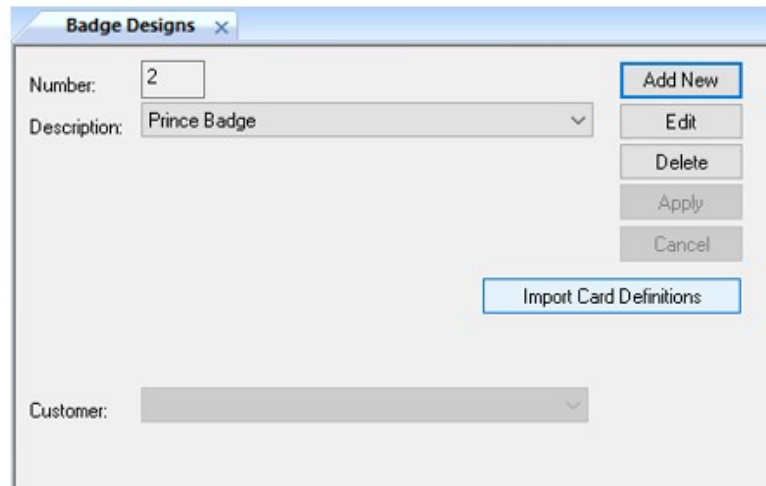
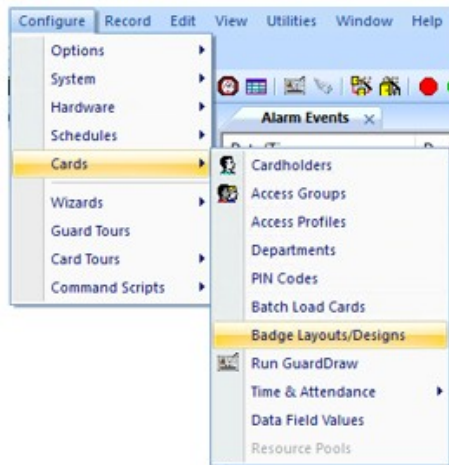
### IMPORTING / SYNCING A BADGE (from System Settings screen)

1. From the SG menu, select **Configure > Options > System Settings**.
2. In the System Settings screen, select the **Badge Options** tab.
3. The *Don't link Customers to idProducer Subscribers* checkbox option should be unchecked for a Basic license. This way you can make customers in System Galaxy, but they will not link to idProducer Subscriptions, because idProducer Subscriptions require an advanced license.
4. Click on the **[Synchronize ...]** button to import or sync badges.
5. Click APPLY and OK to close.



## IMPORTING / SYNCING A BADGE (from Badge Designs screen)

1. From the SG menu, select **Configure > Cards > Badge Designs**.
2. In the Badge Designs screen, Click the **[Import Card Definitions]** button to import or sync badges.





## Assigning and Printing Badges

Badges are assigned and printed or previewed from Cardholder Screen after they have been imported.

- The print dispatcher engine must be running with the printer configured to print badges.

### Assign a Badge to a Cardholder

1. Open the *Cardholder Programming* screen from the toolbar or menu.
2. Click ADD NEW to enroll a new cardholder (or select an existing cardholder from the droplist and click EDIT).
3. Enter the First and Last Name. Then (optional) configure any personnel data needed.
4. (optional) Add a photograph on the Personal tab, if you are using photos on the badge. The photograph will appear on the printed badge if you have properly added the photograph field to the Badge Template in idProducer Badge Designer screen.
5. Enroll the card data and configure any card options as needed – such as activation or expiry.
6. Assign the desired loops and access privileges to the card as appropriate.
7. Make sure you have put data into any fields you need to print on the badge.
8. **Assign a Badge Template** (the droplist will only show Badges that were imported)–
9. Click **APPLY** to save the cardholder record.

The screenshot displays the 'Cardholder Programming' interface. At the top, a search bar shows 'BOND, JAMES (c1)' with buttons for 'Find Record', 'Add New', 'Edit', 'Delete', and 'Apply'. Below this are tabs for 'Personal', 'Card/Badge Settings', 'Data Fields 1', 'Data Fields 2', 'Photo Badging', and 'Alarm Panel User / LCD Message'. The 'Personal' tab is active, showing fields for Record ID (7), Common ID (007-007), Record Type (RT2 ITEM2), LAST NAME (BOND), FIRST NAME (JAMES (c1)), Middle Name (E), Customer (ABC Builders (C1 - 10000)), Phone (1-10-2984645), and Department (AUT DEPT-1 (C1)). The 'Card/Badge Settings' tab is also visible, showing 'Card Data' (Card Description: Card 1, Card Technology: HID Corporate 1000, Company Code: 101, ID Code: 707, PIN / Card Role: 10077 / Access Control) and 'Card Options' (Card Disabled, Card Reversed, PIN Exempt, Duress Enabled, Passback Exempt, Active Date: 7/ 7/1977, Expire Date: 7/ 7/2077, 11:07:00 PM). The 'Badge Settings' section shows 'Badge Design' (Badge-1 (ABC-C1)) and 'Dossier Settings' (Doss Short (C1), Doss-1 (ABC-C1)). The 'Loop/Cluster Settings' section shows 'Authorized Loops' (635 Loop 1) and 'Access Profile' (6 AP DL State Integrity =). The 'Select Access Groups' section shows '1 AUT AP AG DOOR 1' and three 'NO ACCESS GROUP' entries. The 'Defer to Server for Access' section shows 'Never Defer to Server' and 'Action if Server Does Not' (Follow Panel Decision).

Continue to next page for Printing & Previewing

## Print a Badge to a Print Dispatcher

The Print Dispatcher must be running if you want the badge to print immediately. Launch the Print Dispatcher and sign in with the appropriate credentials.

NOTE if the Dispatcher is offline, the idProducer system will add the print request to the print request table and it will print the badge the next time the Printer and Print Dispatcher are online.

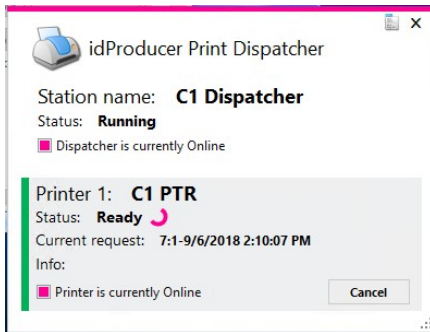
1. From the cardholder screen, click the **PRINT** or **PREVIEW** button
  - If you click the PRINT button, the badge will print to the default printer\*
  - If you click the PREVIEW button the PREVIEW window will open, and you can print to the desired printer
2. Select the Printer in the Printer droplist. (Optionally, you can select the Dispatcher.)
3. Click [Send to Printer] to print the badge immediately (Optionally, you can click [Send to Dispatcher] to send a print request to the Dispatcher Queue. In this case a Dispatch Operator is responsible for routing the print job to a printer.)

The screenshot displays the 'idProducer' software interface. The main window is titled 'BOND, JAMES (c1)' and has tabs for 'Personal', 'Card/Badge Settings', 'Data Fields 1', 'Data Fields 2', 'Photo Badging', and 'Ala'. The 'Card/Badge Settings' tab is active, showing fields for 'Record ID' (7), 'Common ID' (007-007), 'Record Type' (RT2 ITEM2), 'LAST NAME' (BOND), 'FIRST NAME' (JAMES (c1)), 'Middle Name' (E), 'Customer' (ABC Builders (C1 - 10000)), 'Phone' (1-10-2984645), and 'Department' (AUT DEPT-1 (C1)).

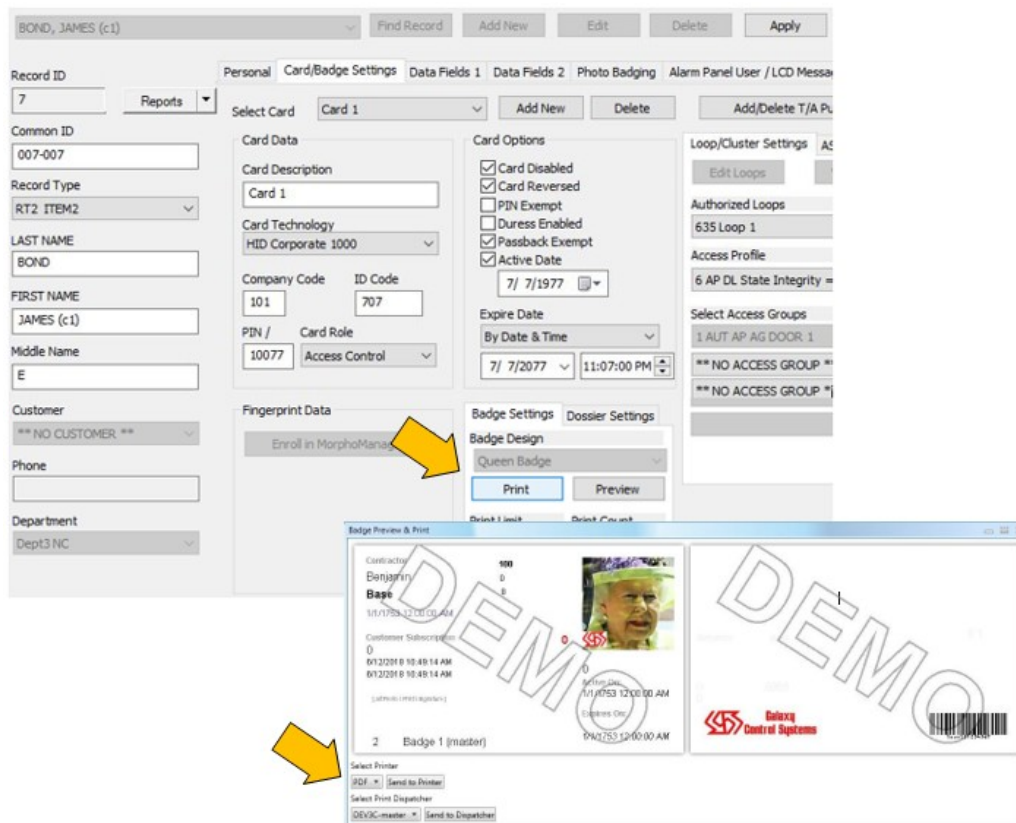
Below these fields are sections for 'Card Data' and 'Card Options'. 'Card Data' includes 'Card Description' (Card 1), 'Card Technology' (HID Corporate 1000), 'Company Code' (101), 'ID Code' (707), 'PIN /' (10077), and 'Card Role' (Access Control). 'Card Options' includes checkboxes for 'Card Disabled', 'Card Reversed', 'PIN Exempt', 'Duress Enabled', 'Passback Exempt', and 'Active Date', along with an 'Expire Date' field (7/ 7/2077).

A 'Badge Preview & Print' dialog box is open in the foreground. It has two tabs: 'Badge Settings' and 'Dossier Settings'. The 'Badge Settings' tab is active, showing 'Select Printer' (C1 PTR), 'Select Print Dispatcher' (Root Dispatcher), and buttons for 'Send to Printer' and 'Send to Dispatcher'. The 'Dossier Settings' tab shows 'Badge Design' (Badge-1 (ABC-C1)), 'Print Limit' (0), 'Print Count' (0), and 'Last Printed'.

4. When the badge is sent to the printer, the Print Dispatcher will display the printing cycle.

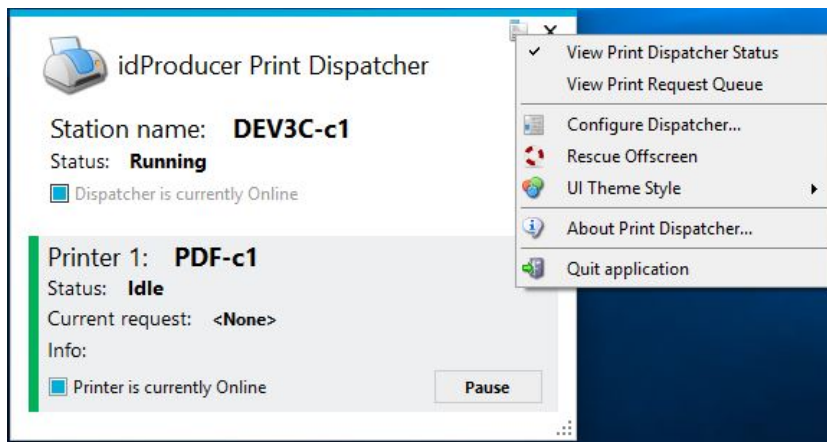


5. OPTIONALLY – from the PREVIEW WINDOW you can print to a Printer or Dispatcher Queue. These badges will not print until they are released by the dispatch operator.



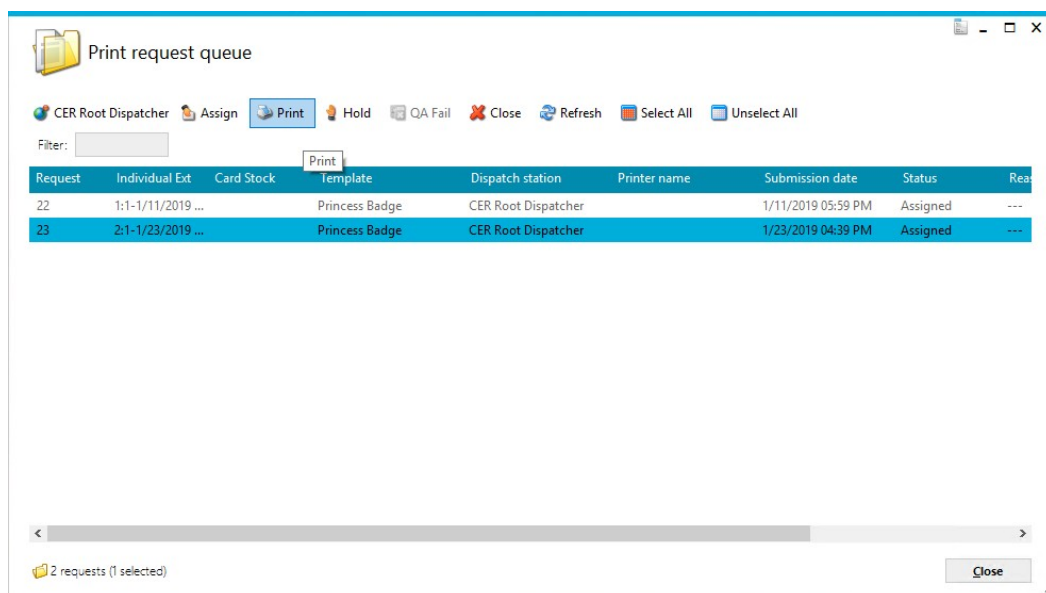
## Releasing a Badge from the Print Queue

1. To release the badge from the dispatcher queue, you must open the Queue from the Print Dispatcher UI.
2. Right-click on the menu icon on the Print Dispatcher
3. Select 'View Print Request Queue' from the menu.



4. Select 'View Print Request Queue' from the menu.
5. When the Dispatcher Queue opens, highlight the badge you want to print and click PRINT.

NOTE: you can delete print requests from the queue by clicking the CLOSE button.



APPENDICES

SYSTEM CONCEPTS - Overview of Badging Support

System Architecture (Standalone vs. Distributed Print Dispatchers)

idProducer can be deployed as a single, standalone badge-printing server, with the Print Dispatcher (print engine) running on the main server to ensure the badge printer(s) are always available. Conversely, the Print Dispatcher (and its printers) can be distributed (networked) on one or more client workstations.

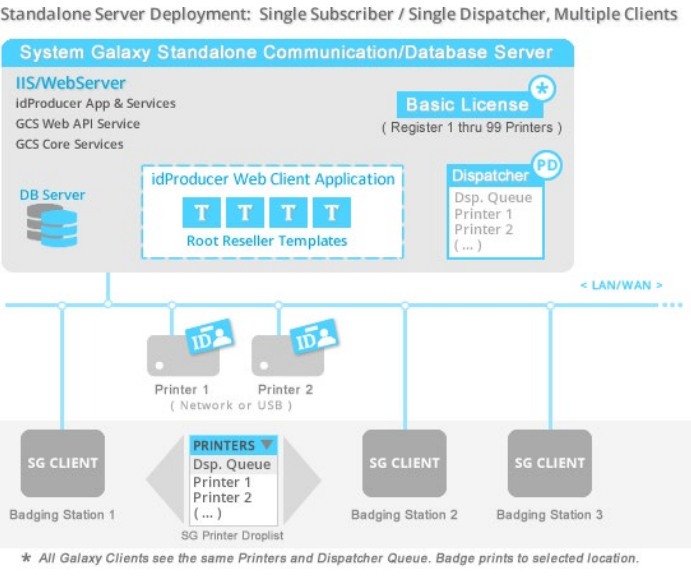
It is important to note that in both scenarios, every *SG Operator* can print badges to all printers from any client. As the diagrams show, the Printer Droplist shows all the printers no matter where the Print Dispatcher(s) have been installed. In both cases the printers can be physically located near the workstation. Multiple distributed Print Dispatchers can support a multi-campus scenario where remote clients must manage their badge printing and Dispatcher Queues independently.

System Topology Diagrams – Basic License:

Single Print Dispatcher on a Standalone Server:

All clients can see/use all printers when the Dispatcher (PD) is running on the server.

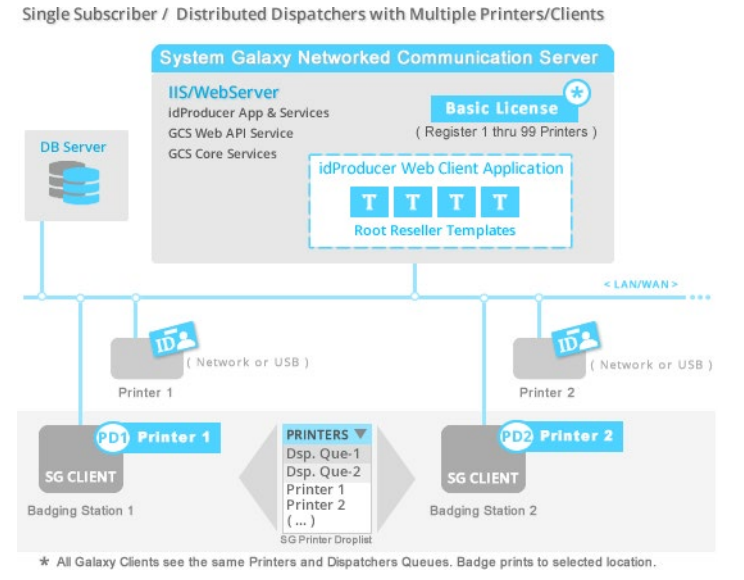
Example A: Registered for 2 printers. Both printers are added to Print Dispatcher-1 on the server.



Multiple Print Dispatchers (networked/distributed):

All clients can see/use all printers, regardless of where the dispatchers are installed. Distributed Dispatchers support multi-campus scenarios where badging stations are located in different buildings or different cities.

Example B: is registered for 2 printers. Printer-1 is added to Prt. Dispatcher-1, Printer-2 is added to Prt Dsp-2.



## Printing Badges (Online vs Offline)

Badges print immediately when they are sent to **online printers**. SG Badging Operators can print to every printer from any workstation, regardless of where the Print Dispatchers are installed. If a Dispatcher is minimized/closed, the printers will still be online, if the API services are running.

**Offline printing** is supported by two methods. If the printer is offline, the operator can still send a badge to the offline printer. idProducer will store the print request in a pending table. When the printer comes online, the pending requests will be buffered to the printer. These pending requests will be processed before any new live print requests are printed.

To avoid making a backlog of pending print jobs at an offline printer, the operator can send a badge to a Print Dispatcher Queue. This way the printer can resume printing new badges when it comes online. A dispatch operator can control when to forward the pending badges from hold queue to the restored printer.

## Prepping Cardholder Data Fields for Transfer

Modifying certain cardholder field names is particularly useful if you want to distinguish between certain card code fields or the specify names for data fields.

System Galaxy transfers the **cardholder field names** to idProducer's Template Fields table when SG system registration is performed. This is the only time the field transfer is done. Therefore, if you need to modify **SG field names** it will save time and work if you do it before you perform the registration.

If you want the new names to go over in the transfer, you will need to modify the names before the system registration is done. This way idProducer will use the modified name in template field names. If you already registered the badging, you can still modify cardholder field names, but you will need to manually update idProducer's field name the in the Template Fields screen, because it is only transferred automatically at the time of registration.

## System Registration and Licensing

System Galaxy produces the Basic License code when you register System Galaxy for idProducer Badging. During system registration, you must also set the number of printers to be installed from your purchase order. System Galaxy sends the Basic License code, the master Root Login, the Reserved API Login, and the Cardholder Data Fields to idProducer when you complete the system registration.

| License Model   | License Generated by ...   | Badging Accounts  | Printer Support   | Multiple Customer-Subscription  |
|-----------------|--|---|---|---|
| Base License    | <b>SG auto-generates license</b> during the System Galaxy registration process.                | <b>1 Root Reseller</b><br>( all badges belong to the Root acct.)        | <b>1 or more Printers</b><br>( on Root Dispatcher)<br><br>All operators see all printers                | <b>(not supported)</b><br><i>SG customers are not supported.</i><br><br>All operators see all badges.   |
| Advance License | <b>idProducer provides license</b> upon client request. License is manually installed by user. | <b>multiple</b> customers-subscriptions under the root reseller account | <b>multiple Printers and Dispatchers</b><br>per account/subscription.<br><br>Operators see all printers | <b>Customer-Subscription</b> supports separate badges based on SG customer assignment. Operators only see badges that are assigned to their customer. |

Refer to *SG idProducer Advanced Guide* for how to install, setup, and operate badging with Advance license features.



## System Settings

In the System Settings there are a couple of useful features related to badging. In the General Tab, you can configure the workstation to not show the events screen. You can also force a synchronization of the badge templates (this imports the badge templates from idProducer). You must be a master operator to change these settings.

## SG Operator Profiles

The SG operator does not need elevated permissions to send badges to a *Printer* or the *Dispatcher Queue*. The operator profile must have the standard editing privileges to the cardholder screen, and the Card/Badge settings tab must be visible. The badging operator profile can be filtered from viewing events or configuring hardware if you desire, but the privileges related to enrolling a cardholder must remain intact.

## REVISION HISTORY OF THIS GUIDE

| DATE                    | DESCRIPTION of REVISION   |
|-------------------------|---|
| Nov 2018                | First release of guide for on-premises standalone server deployment only.   |
| DEC 2018                | Splitting guide content to basic and advance badging (the term advance license replaces custom license).                      |
| JAN 2019<br>SG 11.1.0   | Basic License for standalone install (recommended); 1 Root Subscription supporting 1 Printer/Dispatcher.                      |
| APR 2019<br>SG 11.1.0.2 | Update: added registering multiple printers for Basic Lic. (Root Reseller) and installing/using Print Dispatchers at clients. |

## RELATED DOCUMENTATION

| DOCUMENT NAME   | DESCRIPTION   |
|---|---|
| » <b>System Galaxy Install Procedure</b>              | SG Install Quick Start Procedure - for System Galaxy installation.            |
| » <b>SG System Specifications Guide</b>               | SG Admin Guide - Specifications for OS, PC/Servers, Clients, Networking, etc. |
| » <b>SG Software User Guide</b>                       | SG User Guide - programming and using the SG software.                        |
| » <b>SG idProducer Basic Guide</b> (Basic License)    | SG Integration Guide - set up & use idProducer Badging with Basic License.    |
| » <b>SG idProducer Advanced Guide</b> (Advanced Lic.) | SG Integration Guide - set up & use idProducer Badging with Advanced License. |
| <b>Also see <a href="#">Galaxy Online Help</a></b>    | Documentation Directory – for full list of available documents.               |



## TERMS & DEFINITIONS

| TERM  | MEANING   |
|---|---|
| <b>GCS</b>                                      | (acronym) Galaxy Control Systems.   |
| <b>idP (or IDP)</b>                             | (acronym) idProducer.   |
| <b>SG</b>                                       | (acronym) System Galaxy.  |
| <b>API Services</b>                             | The specific services that allow the SG software to integrate with and make calls to the idProducer API. GCS Web API Service. idProducer has 2 services that must be running.   |
| <b>appSettings file</b>                         | A configuration file that contains specific settings that SG uses to integrate with idProducer and the Print Dispatchers.   |
| <b>Communication Server(SG)</b>                 | The main System Galaxy main event and communication server.   |
| <b>Customer (SG)</b>                            | (Advance License only) The <i>SG Customers</i> are only supported with <b>Customer-Subscription linking</b> , which requires an <i>advanced license</i> . See <i>SG idProducer Advanced Guide</i>   |
| <b>Customer-Subscription (Advanced License)</b> | (Advanced License only) A <b>Customer-Subscription</b> is a <i>child subscription</i> under Root Reseller in idProducer that is 'linked' to an SG Customer if using an advanced license. NOTE: the Customer-Subscription must be created in System Galaxy to create the <i>customer linking</i> and insert the Subscription account and login into idProducer.<br>NOTE: the SG Operator must be assigned to the same customer to import, view, assign, and print the <i>customer badges</i> for cardholders that are assigned to the same Customer. NOTE: You will also use the Customer-Subscription Login to sign-in and run the Customer-Subscription Print Dispatcher. See <i>Advanced idProducer Guide</i> . |
| <b>Login, Reserved API (SG)</b>                 | The <b>Reserved API Login credential for System Galaxy</b> is exclusively used for API connections and communication between SG and the API Service. The SG API Login is created during Part-3 of the SG Installation. Do not use the reserved API Login as a login for admin or operator tasks.  |
| <b>Login, Reserved API (idP)</b>                | The <b>Reserved API Login credential for idProducer</b> is exclusively used for the API connections and communication between the idProducer and the API Service. System Galaxy creates the <i>idProducer Reserved API Login</i> during SG system registration process. Do not use the reserved API Login as a login for admin or operator tasks.   |
| <b>Login, Root Subscription</b>                 | The <b>Root Login credential</b> is used to sign-in to the Root Reseller account at the idProducer Client. Galaxy creates this login during <i>SG System Registration</i> process because it needs it to download the SG Cardholder Data Fields (Template Fields) to idProducer. You can use this login to sign-in to idProducer Web Client and perform administrative tasks at idProducer for the Root subscription. This login is also used to sign-in and run the Root Print Dispatcher.   |
| <b>Login, Subscription</b>                      | (Advance License only) This is the login for a Customer-Subscription account. It is created by System Galaxy from the Customer Screen.  |
| <b>Print Dispatcher App (idP)</b>               | The <b>idProducer Print Dispatcher App</b> is a print engine that resides on the main server (or on a Client). It processes the <i>on-demand badge printing, pending jobs, and queues</i> for the badge templates that belong to the Subscription that is associated with the Dispatcher (i.e. Root Subscription for basic license; or Customer-Subscription for advanced license). The SG Operator sends a selected badge to a printer (or to the Dispatcher Queue) from the System Galaxy <i>Cardholder screen</i> .  |
| <b>Print Dispatcher Queue</b>                   | The <b>Print Dispatcher Queue</b> is a holding queue for <i>badge print jobs</i> that were not sent directly to a printer, which is a useful alternative when a printer is offline. This lets the badging operator send badges to the Dispatcher Queue for manual processing by the dispatch operator, instead of cluttering up the print buffer of the offline printer. Then when the printer comes back online, it is ready for live badge printing without having a backlog of pending print requests in its buffer. And the Dispatch Operator can hold the print requests in the queue until a printer is available or send the badge to a  |

|   |  |
|---|--|
|   | different printer.   |
| <b>Root Reseller (Basic License)</b>    | The <b>Root Reseller (Basic)</b> is the <i>root subscription</i> in idProducer App, which is the <u>only subscription allowed</u> under a basic license. FYI: the Root Reseller name is changed to the <i>SG Site Name</i> at time of SG registration. The <i>Site Name</i> is found in the <i>SG System Registration screen</i> .<br>NOTE: All badges belong to the Root Subscription, which only supports the “no customer” schema. This means that all <i>imported badges</i> will always be visible to every <i>badging operator</i> (provided the operator privileges/permissions are filtered in the <i>SG Operator Profile</i> ). |
| <b>Root Reseller (Advanced License)</b> | The <b>Root Reseller (Advanced)</b> is the <i>root subscription</i> in idProducer App, which is the <i>parent subscription</i> allowed under an AdvanceLicense.. Under Advanced License, the Root Reseller is mapped to the “No Customer” entity in SG. The root badges and root printers are only available for Cardholders who are mapped to a the ‘No Customer’ selection.  |
| <b>Operator, SG Customer Badging</b>    | This is the System Galaxy operator that is assigned to a <i>Customer</i> in SG Operator profile screen. NOTE: SG operators have their own secure login. The operator profile should be configured to <i>allow viewing and editing</i> the cardholder screen, and should not have filters that prevent them from doing their work tasks.  |
| <b>Operator, SG Root Badging</b>        | This is the System Galaxy operator that is assigned to ‘ <i>No Customer</i> ’ in SG Operator profile screen. NOTE: SG operators have their own secure login and their profile should be set up to allow <i>viewing and editing</i> the cardholder screen, and should not have filters that prevent them from doing their work tasks.   |
| <b>Subscription</b>                     | a.k.a Customer-Subscription; Advance License required) A Customer-Subscription is a “child” under the Root Reseller, which must be added from the System Galaxy Customer Screen.   |