

Jolly Presents...

ID Flow

Getting Started Guide

An Introduction to ID Flow

Contents

Introducing ID Flow.....	3
Quick Start Options.....	4
Quick Start Option 1.....	4
Quick Start Option 2.....	6
Using ID Flow	8
Jolly Server Settings and Workstation Options	8
Installing Jolly Server.....	9
Connecting to a shared Jolly Server – Networking Multiple Copies.....	9
Jolly Server Settings	10
Workstation Options and Devices	11
ID Card Design.....	12
Design Screen.....	12
Working with Text.....	13
Working with Layers	14
Viewing Designs with Live Data	15
Working with Print Conditions.....	15
Saving a Design	16
Enrollment Configuration	16
Record Lookup Configuration	18
Report Center Configuration	19
Record Center	19
Configuring the Record Screen	21
Advanced Field Formatting.....	21
Configuring Language	22

Introducing ID Flow

ID Flow is premier software for ID card design, production and data management.

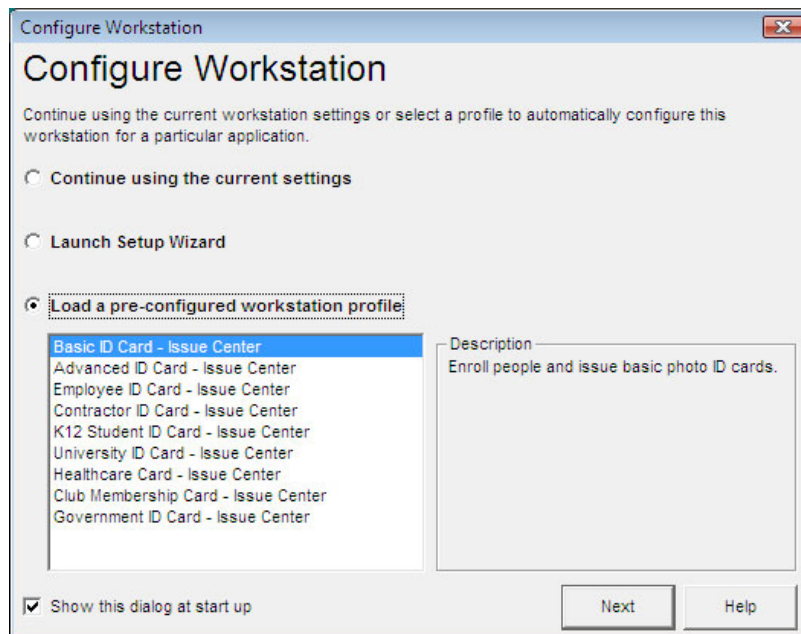
This guide provides basic understanding of product components and how to get started. This guide is a supplement to the Help Menu provided within the product. The built-in Help Menu provides comprehensive configuration details for each dialog.



Quick Start Options

Quick Start Option 1

ID Flow is preconfigured with several *Workstation Profiles*. These profiles allow users to select an application that resembles their intended use. Profiles are configured with sample badge designs, menu options and enrollment processes that are appropriate for the application.

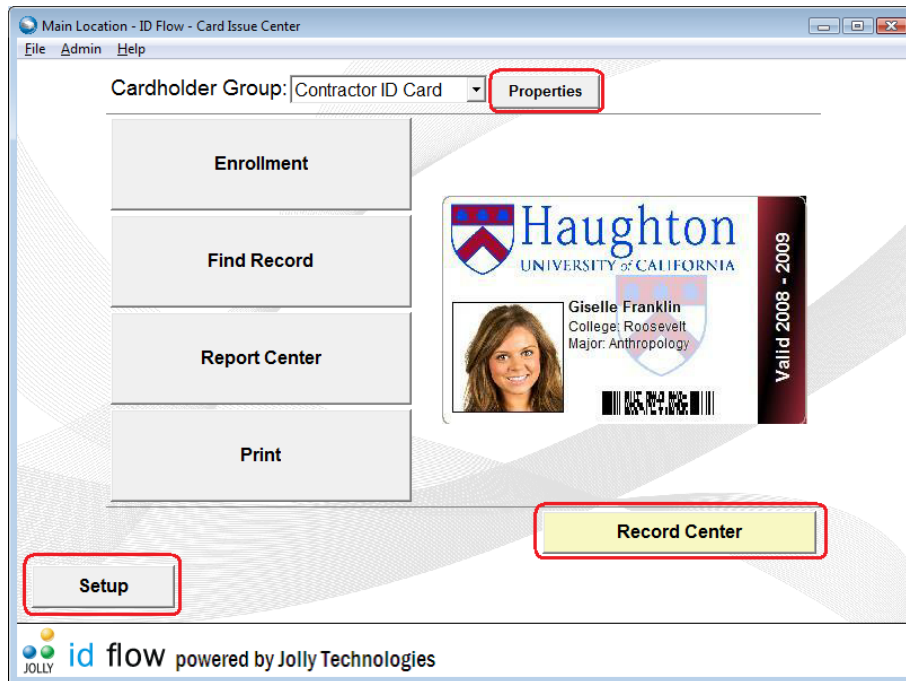


The *Basic* group has six data fields and a single-layer card design. The *Advanced* group has additional fields, including signature and fingerprint fields, and a multi-layered card design. These card designs are linked to a sample database that includes four sample records. The card designs, data and data fields may be modified.

To use a pre-configured profile to get started, click on the profile and click *Next*.

Getting to configuration

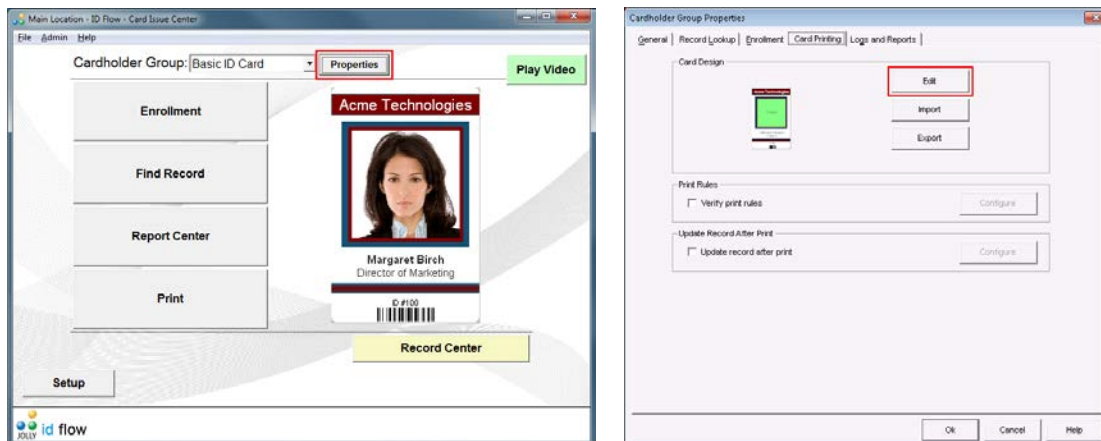
Configuration is done through the *Setup* button on the *Main Menu* or through the *Admin Menu*. Only users with Administrative Rights can change settings. After clicking *Setup* you may choose to configure *Jolly Server Settings* or *Workstation Settings*. There is a shortcut next to the *Cardholder Group* that will go directly to the *Cardholder Group Properties* dialog. The *Record Center* button takes you to the database view of all records.



Click on *Record Center* to see the fields that are pre-configured in the database.

Editing Card Design

Each Cardholder Group has an associated ID card design. To edit the card design, open the Cardholder Group Properties, select the Card Printing tab and click Edit.



This will launch the card designer.

In the card designer, design objects may be moved and resized with the mouse, deleted by selecting delete while the object is highlighted and edited by double-clicking on the

object. Design Objects may be added using the design object toolbar on the left of the screen and by drawing the approximate object placement on the card with the mouse. To change the card size and orientation go to *File -> Edit Page Setup*. More details about *ID Flow Designer* follow on subsequent pages.

After design modifications are finished click *Exit* and *Save*.

For more information, refer to the Card Designer section later in this document.

Other Settings

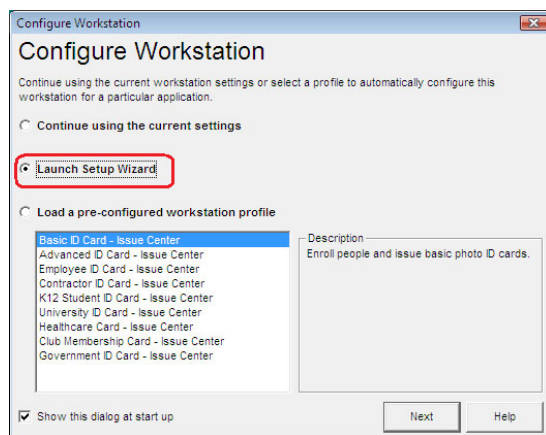
Use the *Enrollment* button on the *Main Menu* to enroll new cardholders. Modifications to the enrollment process, record look up and logs and reports are configured in the *Cardholder Group Properties*.

See records by clicking the *Record Center* button. Sample records may be deleted, but it is suggested a new record be added first so that the data set is not empty.

User Accounts and *Locations* are configured in *Jolly Server Settings* and workstation tasks are configured in *Workstation Settings*.

Quick Start Option 2

Select “*Launch Setup Wizard*” from the *Configure Workstation* dialog at start up or run from the *Setup* menu.



Global Settings

Configure settings that apply to the entire company such as visitor groups, locations, log options, user accounts, e-mail notifications, and more.

Configure Global Settings

Workstation Settings

Configure settings that apply only to this workstation such as allowed tasks, local devices and more.

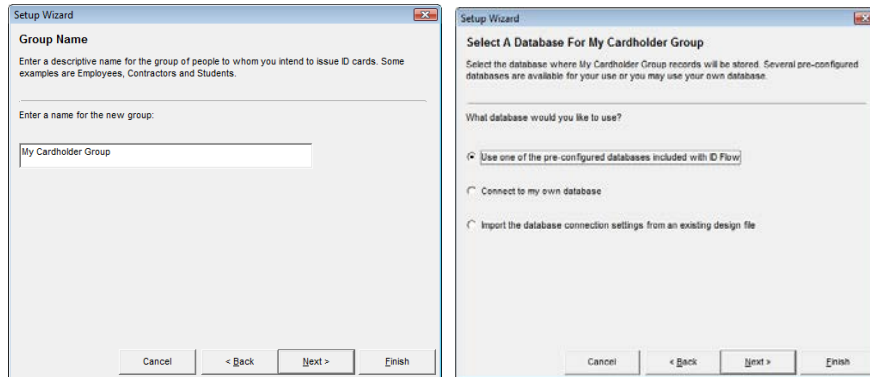
Configure Workstation Settings

Setup Wizard

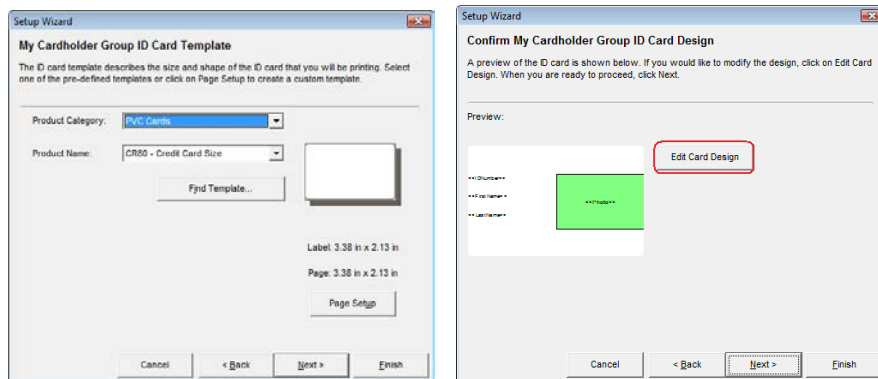
Run the guided setup wizard to create a new visitor group and configure workstation task settings.

Run Setup Wizard

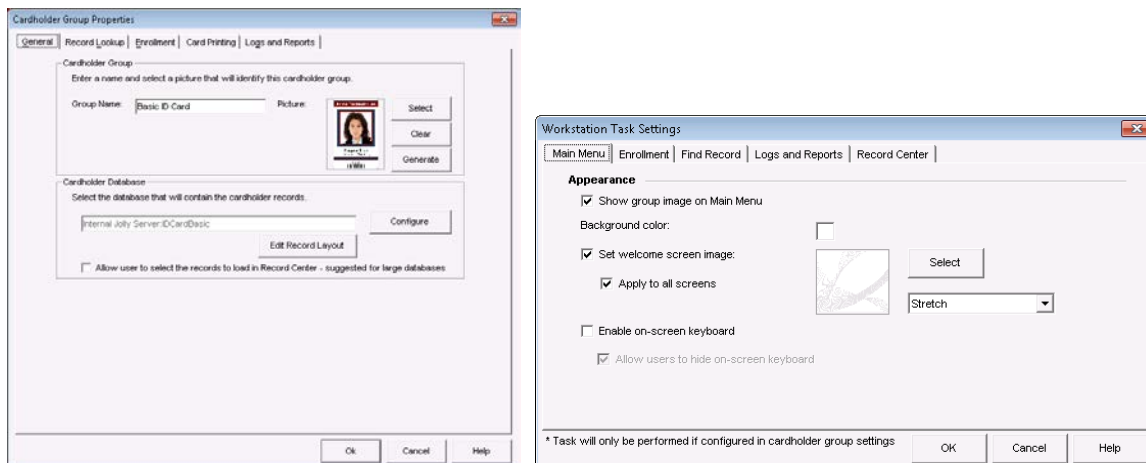
Name the cardholder group; then choose the database:



Select the card size and then click edit the badge design (see instructions below for ID Flow Designer):

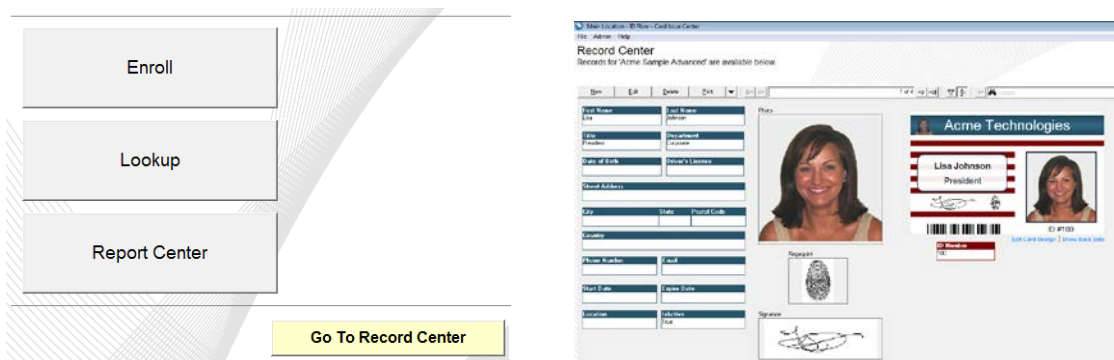


Then configure each tab of the *Cardholder Group* and *Workstation Settings*:



Using ID Flow

ID Flow has been designed to simplify the day-to-day data entry and production of ID cards. It allows the user to enroll new cardholders, lookup an existing record and view reports of all actions that have occurred. The *Record Center* shows all database records and their ID card design.



Card Issue Center is designed so that multiple locations may be networked through sharing a central Jolly Server. For this reason, there are two types of configuration settings: *Jolly Server Settings* and *Workstation Options*.

To Setup, select the setup button on the *Main Menu* screen or from the Admin Menu. Only Administrators have setup ability.



Jolly Server Settings and Workstation Options

ID Flow is designed to run across multiple locations in a networked environment. Shared settings such as cardholder groups and log data are stored on the Jolly Server while workstation specific options are configured in Workstation Options and Devices.

If ID Flow will be used in a standalone environment where it does not need to share data with other workstations, it can use the Internal Jolly Server, installed as part of ID Flow.

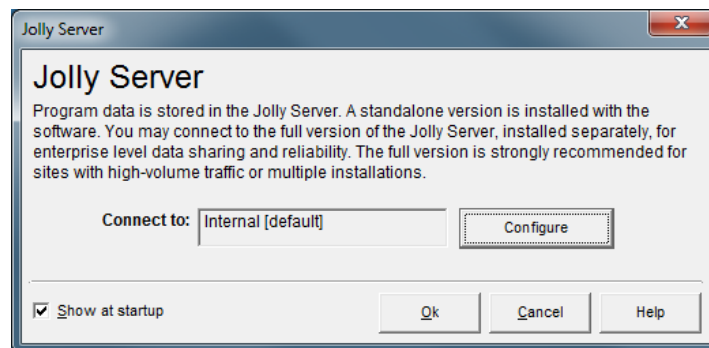
Installing Jolly Server

Jolly Server is installed separately from ID Flow. To install, run the Jolly Server installer that was provided to you when you purchased the software on the target server or workstation.

Connecting to a shared Jolly Server – Networking Multiple Copies

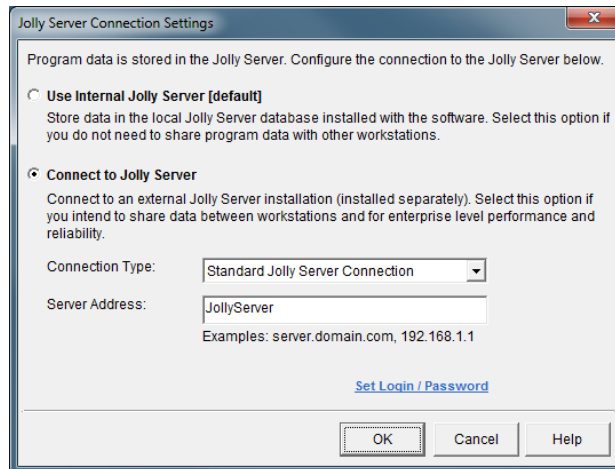
When networking multiple copies of ID Flow, install the Jolly Server on a central server or shared workstation. All networked copies should point to the same Jolly Server.

To connect to a *Jolly Server*, select *File > Connect to Jolly Server*.



By default, the *Internal Jolly Server* is selected. When Internal Jolly Server is selected, the software will operate in standalone mode.

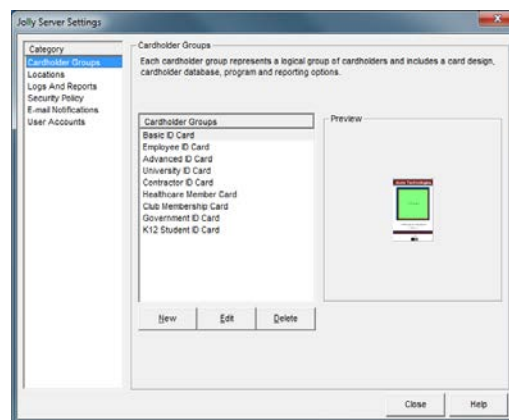
To connect to a shared *Jolly Server*, click the *Configure* button.



Enter the name of the server or workstation where Jolly Server was installed.

Jolly Server Settings

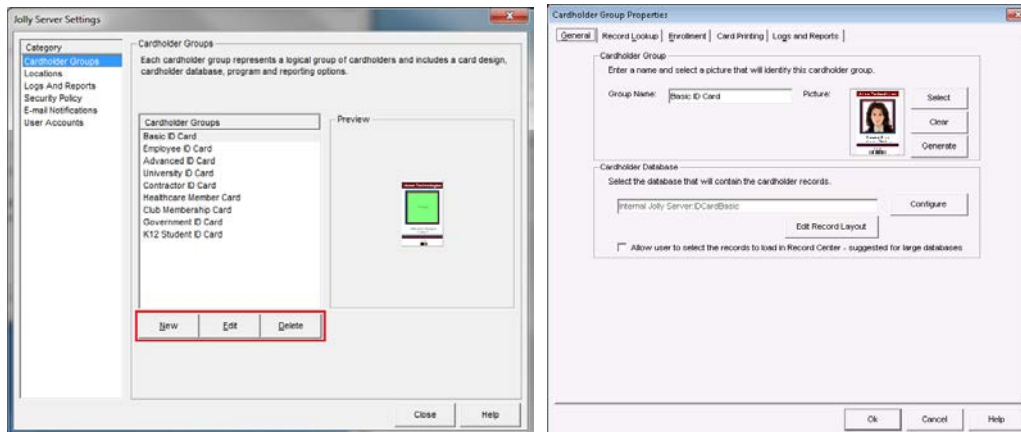
Jolly Server Settings are settings that can be shared between workstations such as Cardholder Groups, Locations, Logs and Reports, Security Policy and User Accounts.



Settings for *Locations*, *Logs and Reports*, *Security Policy* and *User Accounts* are obvious when the dialog is open.

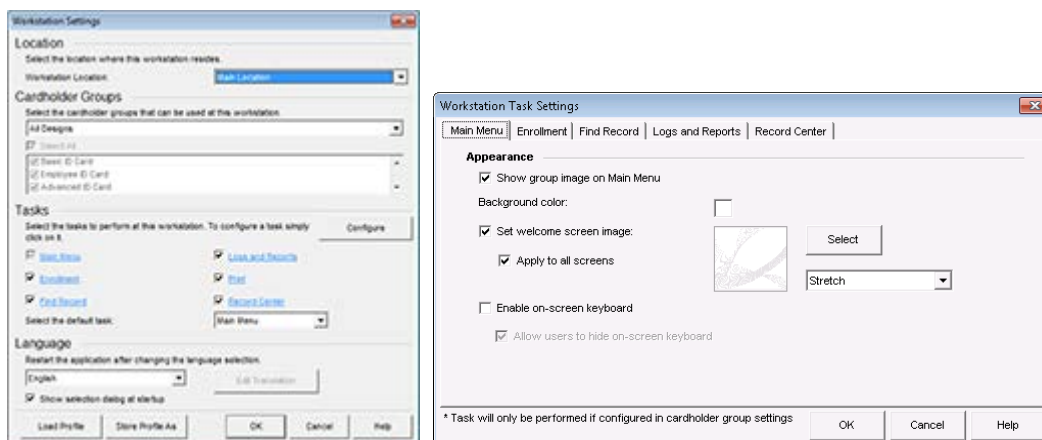
Cardholder Group settings work in tandem with Workstation settings. Examples: 1. In order to capture a signature in the enrollment process, the signature field must be defined in the cardholder group's *Enrollment* tab; 2. In order to lookup a record by email address, that field needs to be defined in *Record Lookup* tab; 3. In order to log the name and titles of cardholders, those fields must be defined in the *Logs and Reports* tab.

To configure the cardholder group's settings, highlight the group and select edit.



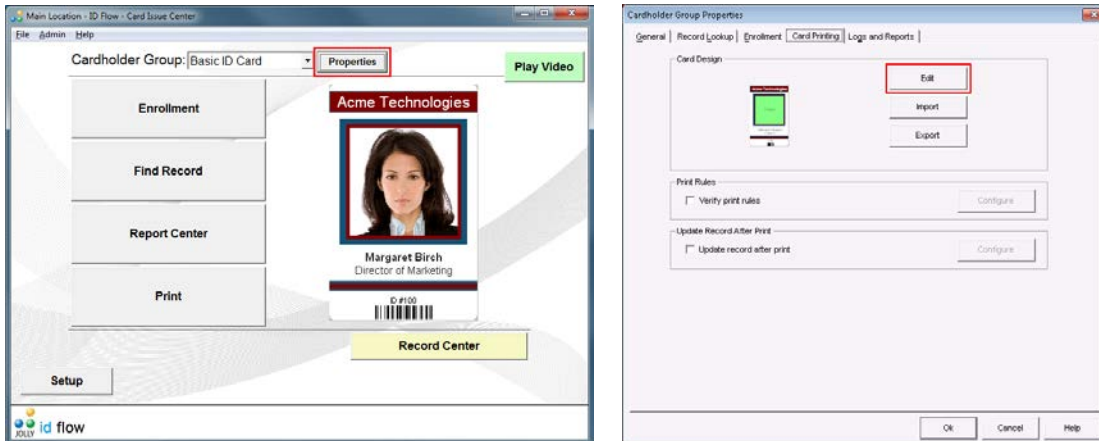
Workstation Options and Devices

Workstation Options and Devices apply to only to a specific workstation. They include selecting the location, cardholder groups available at the location, selecting which tasks will be available to the user, configuring the tasks and capture devices, and selecting the language to be used a this location. Tasks are configured individually through the task's blue hyperlink or together via the configure button:



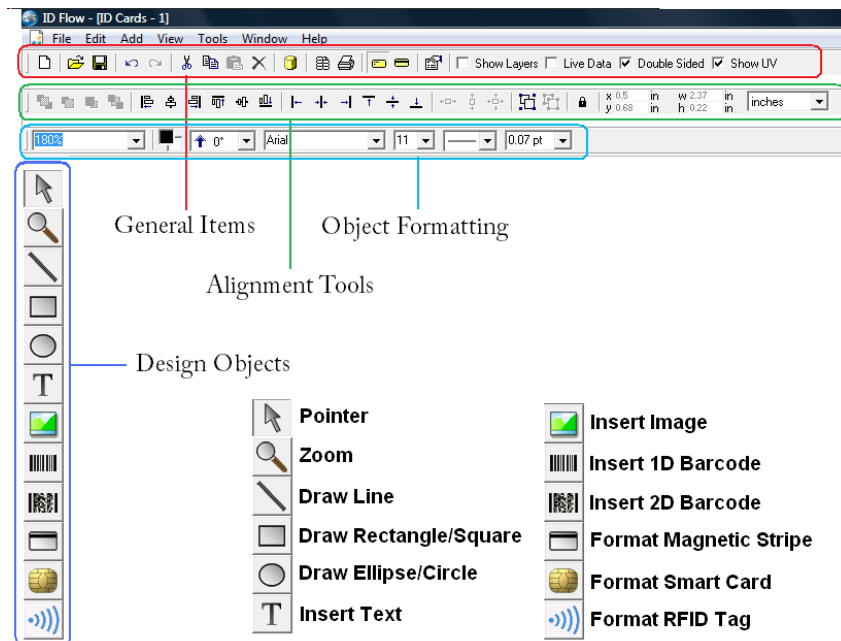
ID Card Design

Each Cardholder Group has an associated ID card design. To edit the card design, open the Cardholder Group Properties, select the Card Printing tab and click Edit.

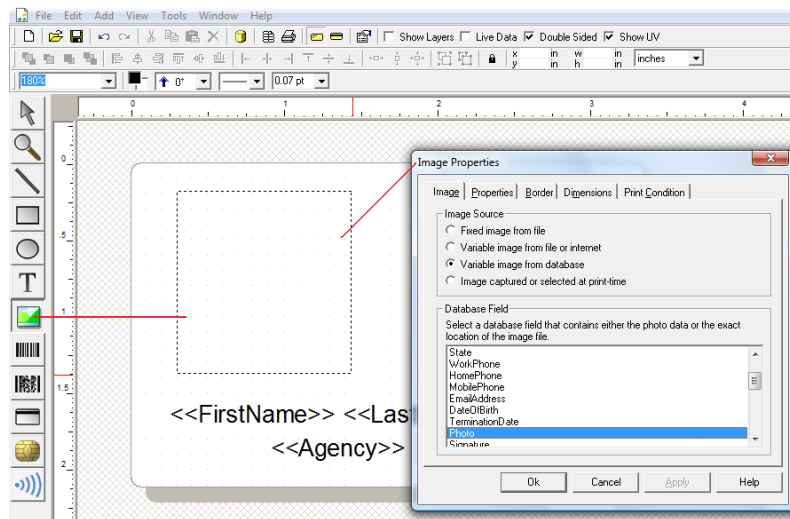


Design Screen

The design screen contains four toolbars: general items, alignment tools, design objects and object formatting.



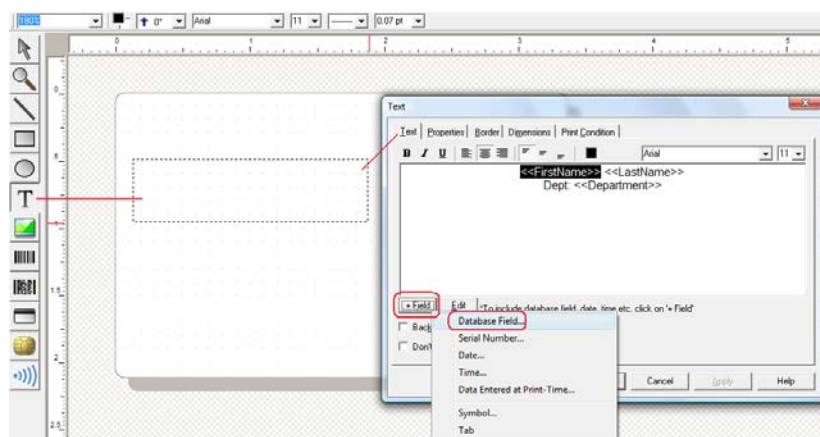
Cards are designed by selecting the design object on the left-hand toolbar and by drawing that object's area on the card with the mouse. After the area drawn the object's *Properties* dialog will appear. Click through the tabs to format the object.



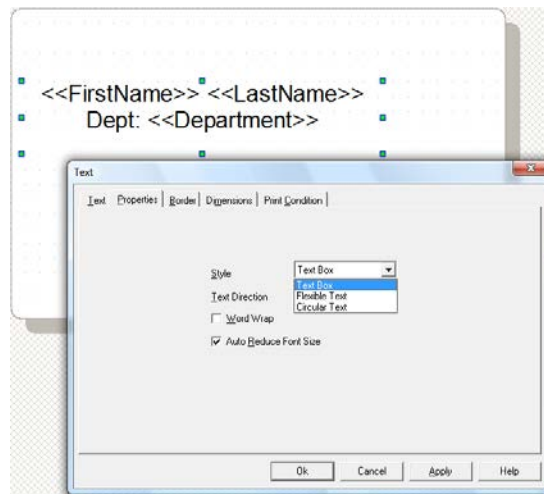
Objects may be resized at any time and *Properties* dialog re-accessed by double-click.

Working with Text

ID Flow contains rich text editing. Regular text, database text, serial number, date and time may be combined within one text box. Type with a keyboard or use the *+ Field* button for text selections.



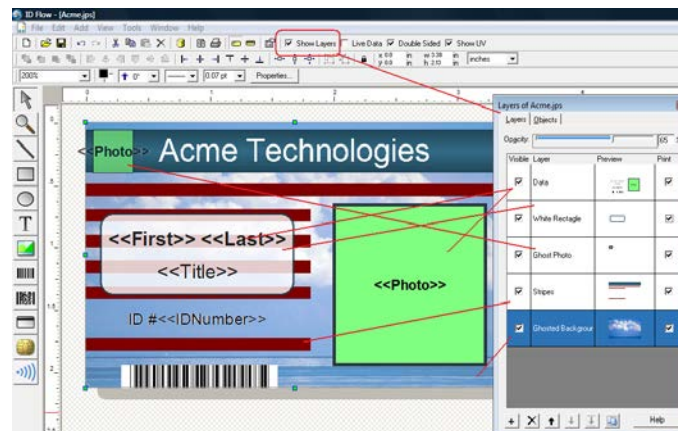
There are three types of text formatting: Text Box, Flexible Text and Circular Text. *Text Box* will always place text within the bounds of the box drawn in the design: If larger, it will auto-reduce in font size or word wrap. *Flexible Text* will maintain font size regardless of the size of the box drawn. *Circular Text* formats text in a circle.



Working with Layers

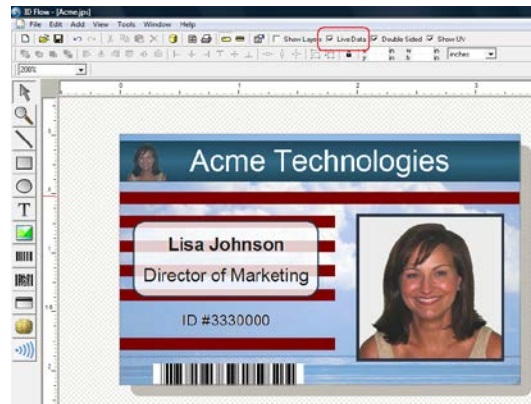
Like other quality graphical design tools, ID Flow uses a layered design approach. Layers may contain different design objects of varying opacity. Using layers adds a rich depth to design and creates highly secure cards.

To see the layers window click the *Show Layers* checkbox on the top menu bar. Layers are added using the [+] button at the bottom of the window. Use the arrow buttons to move layers above and below other layers. Click the *Print* checkbox on each layer to format its print condition. The active design layer is highlighted blue.

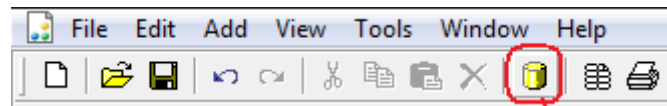


Viewing Designs with Live Data

At any time the card design may be viewed with data by checking the *Live Data* button on the top menu bar:

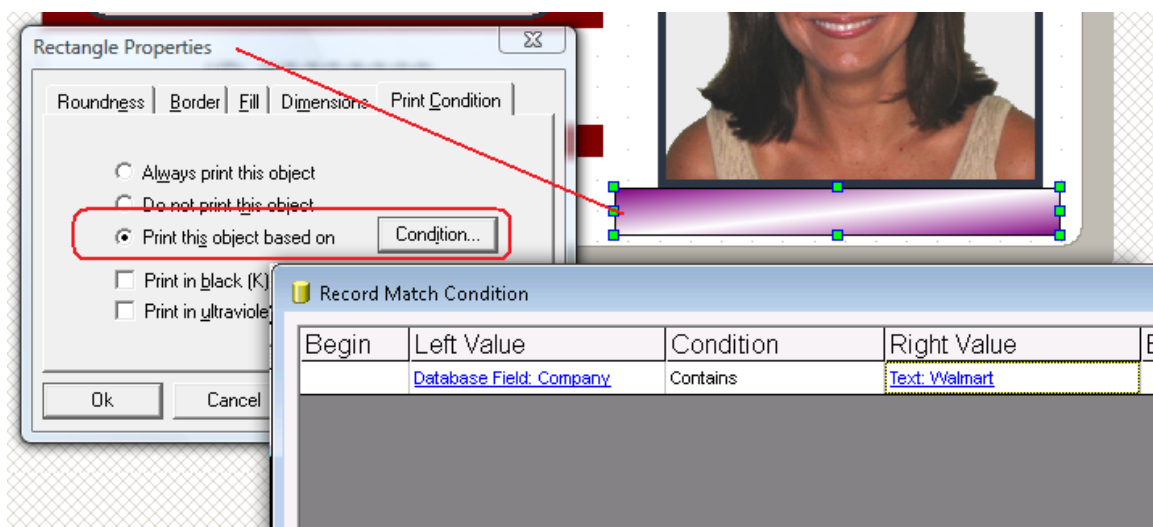


To view the full record set: go to *File -> Database Setup* or click the data icon on the top menu bar:



Working with Print Conditions

Design objects or design layers may be set to print only if specific database conditions are met. Print conditions are set on the *Print Conditions* tab of the object's properties dialog. K Panel (Black Panel) and UV Panel are also set on this tab.

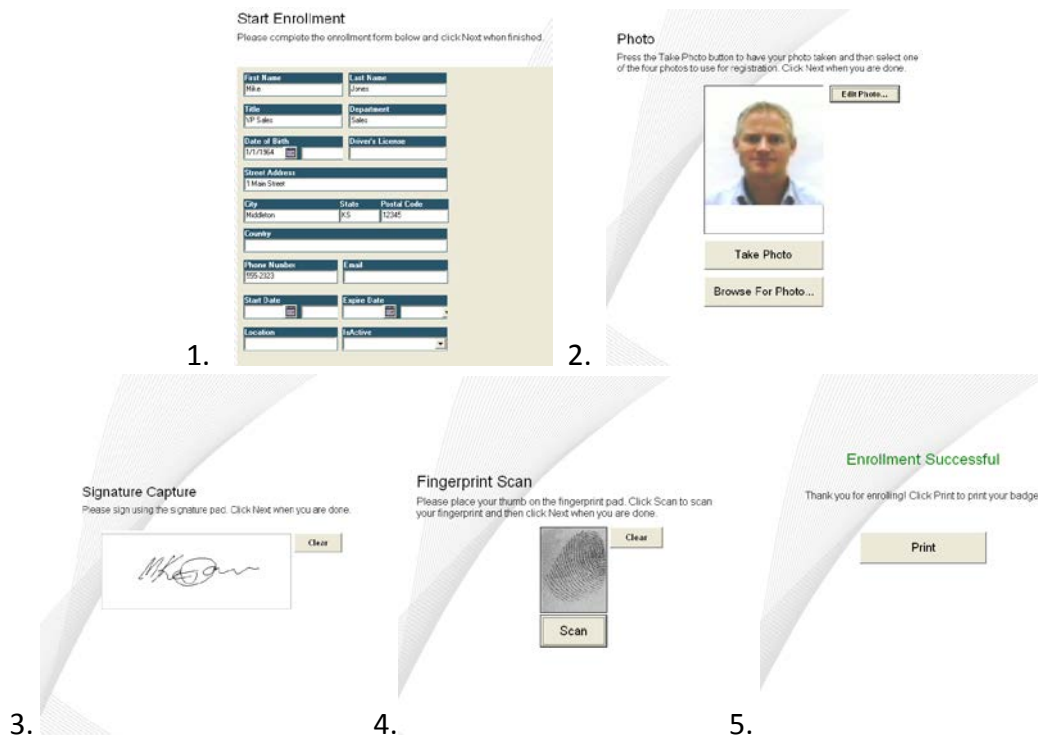


Saving a Design

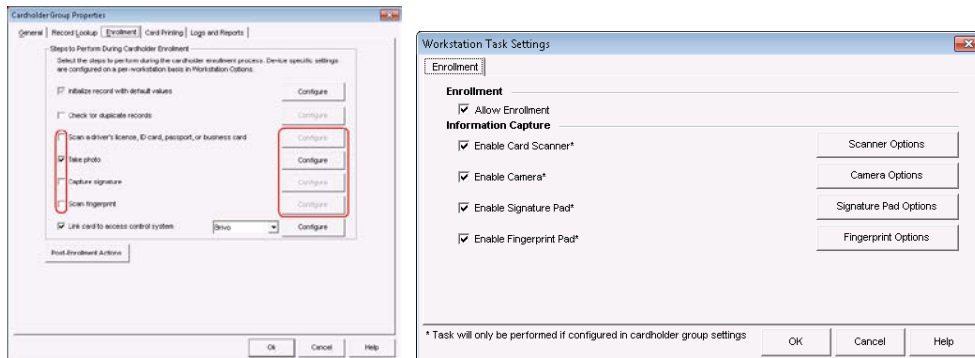
When you are done editing the card design, close the designer to return to the Card Issue Center.

Enrollment Configuration

Users define the relevant workflow for enrollment. Available steps include Data Entry, Photo Capture, Signature Capture, Fingerprint Capture and Card Printing:



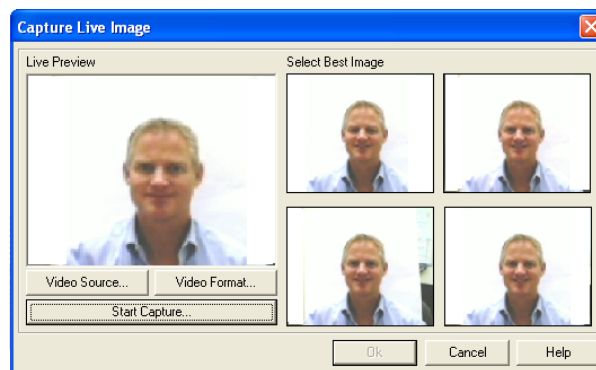
To configure photo capture, driver's license scan, signature capture and fingerprint scan in enrollment, define the processes in the Cardholder Group Properties (Jolly Server Settings), and then enable the options and configure the devices in the workstation settings:



The capture device specifications are configured by clicking the *Options* buttons in the *Workstation Task Settings*.

Notes about capture devices:

ID Flow supports TWAIN and WIA compatible cameras. The ability to capture a photo from within ID Flow and trigger the flash will depend upon the camera's software. ID Flow is commonly used with web cams: When Microsoft WDM is invoked as the capture source, four photos are captured and the best may be chosen.



ID Flow supports Topaz and Interlink USB signature and fingerprint pads.

ID Flow support Card Scanning Solutions ScanShell 800, ScanShell 1000 and SnapShell camera for driver's license and/or passport scanning. It does NOT support the 800N.

Some device files and drivers may be found under "add-on modules" on the "Download" section of the www.jollytech.com website.

Record Lookup Configuration

Record Lookup allows the user to quickly search for records. When multiple matches occur a selection dialog is shown. Strict matching may also be used if desired.

Lookup Record
Please scan the badge or enter the ID number and click Next.

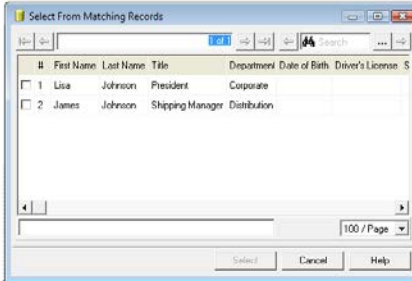
ID Number

Don't know the ID number? Complete this form to look it up.

First Name

Last Name

Date of Birth



Select From Matching Records

#	First Name	Last Name	Title	Department	Date of Birth	Driver's License
<input type="checkbox"/> 1	Lisa	Johnson	President	Corporate		
<input type="checkbox"/> 2	James	Johnson	Shipping Manager	Distribution		

100 / Page

Select Cancel Help


Record Found

The following matching record was found.

Edit Print View History

First Name	Last Name	
James	Johnson	
Title	Department	
Shipping Manager	Distribution	
Date of Birth	Driver's License	
Street Address		
City	State	Postal Code
Country		

Photo



Acme Technologies

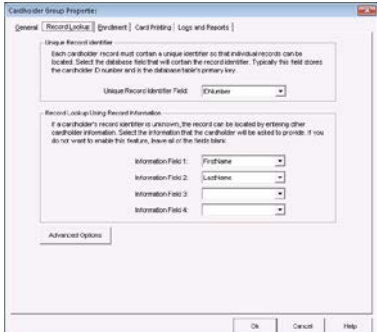
James Johnson
Shipping Manager

ID #102

ID Number
102

Edit Card Design Show Back Side

To configure record lookup, first define the lookup fields in the *Record Lookup* tab of *Cardholder Group Properties* dialog found in *Jolly Server Settings*. The options can be further defined in the *Advanced Options* dialog.



Cardholder Group Properties

General Record Lookup Card Printing Logs and Reports

Unique Record Identifier

Each cardholder record must contain a unique identifier so that individual records can be located. Select the database field that will contain the record identifier. Typically this field stores the cardholder's Username and is the database field's primary key.

Unique Record Identifier Field: Username

Record Lookup Using Record Information

If a cardholder's record identifier is unknown, the record can be located by entering other cardholder information. Select the information that the cardholder will be asked to provide. If you do not want to enable this feature, leave all of the fields blank.

Information Field 1: First Name

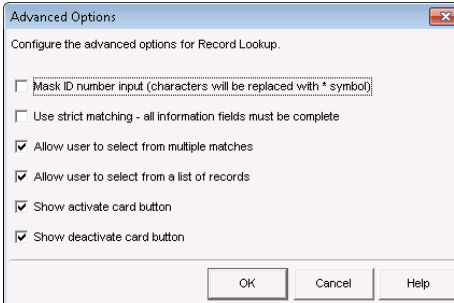
Information Field 2: Last Name

Information Field 3:

Information Field 4:

Advanced Options

OK Cancel Help



Advanced Options

Configure the advanced options for Record Lookup.

Mask ID number input (characters will be replaced with * symbol)

Use strict matching - all information fields must be complete

Allow user to select from multiple matches

Allow user to select from a list of records

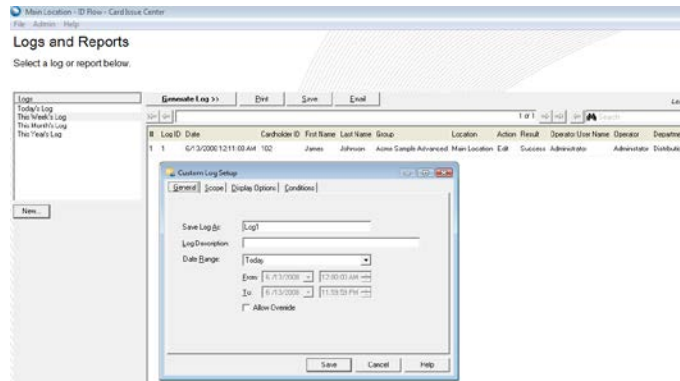
Show activate card button

Show deactivate card button

OK Cancel Help

Report Center Configuration

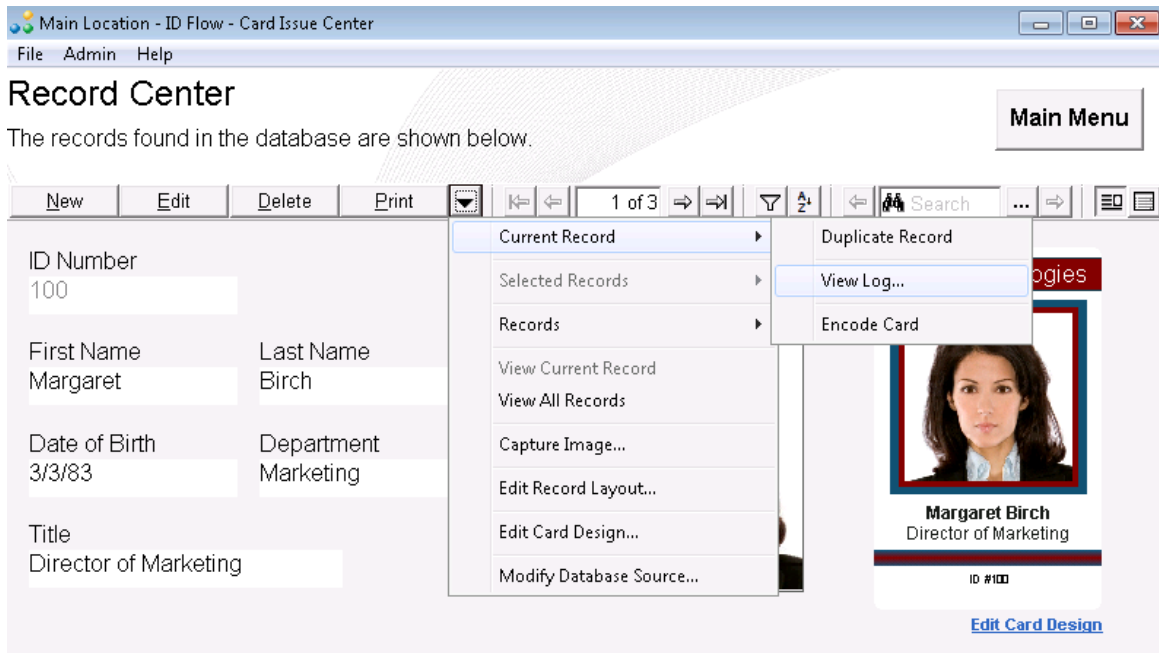
Logs and Reports shows activity on all actions that occur in the product: when a record was added, edited or deleted and when card was printed; by whom, at what time and location. Custom logs may be designed. Reports may be printed, exported and emailed.



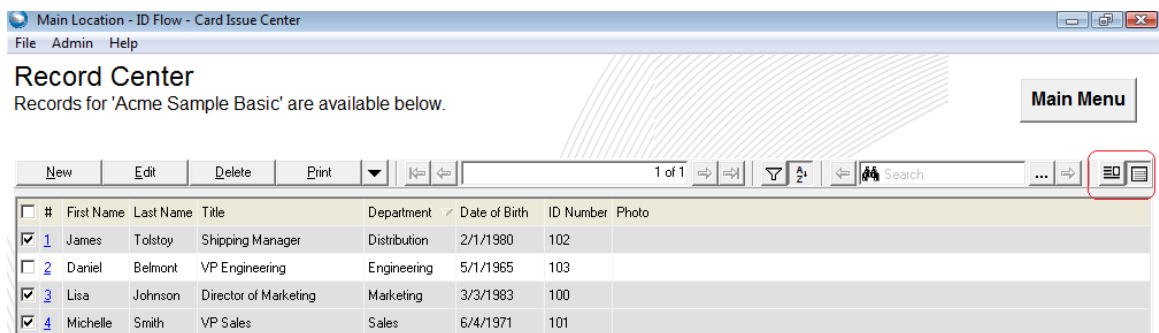
Four fields from a cardholder's record may be configured in the *Logs and Reports* tab on the *Cardholder Group Properties* dialog. The *Workstation Setting for Logs and Reports* makes the item available or not.

Record Center

Record Center is used for the management of records. Records may be added, edited, deleted, printed and duplicated from this screen. The down-arrow button provides additional options.

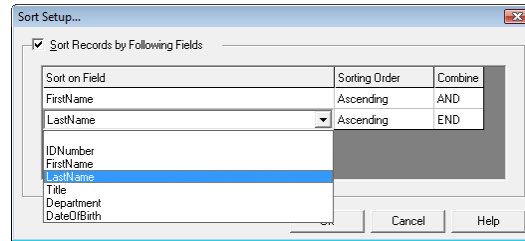


Records may be viewed in single-record or spreadsheet view by selecting the buttons on the right of the toolbar.



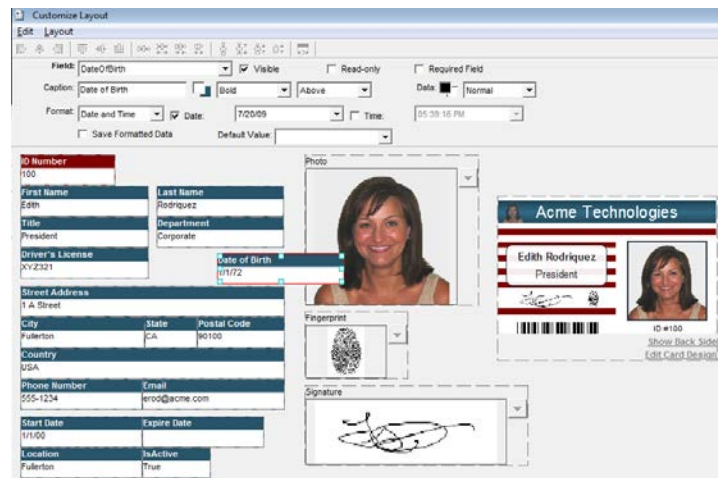
Records may be batch printed, deleted and edited by checking the box to the left of the record and selecting the appropriate action. Records may be sorted by clicking on column headers.

The toolbar contains *filter* and *sort* buttons . Filters are used to create data subsets. Sorting allows for multiple field sort criteria.



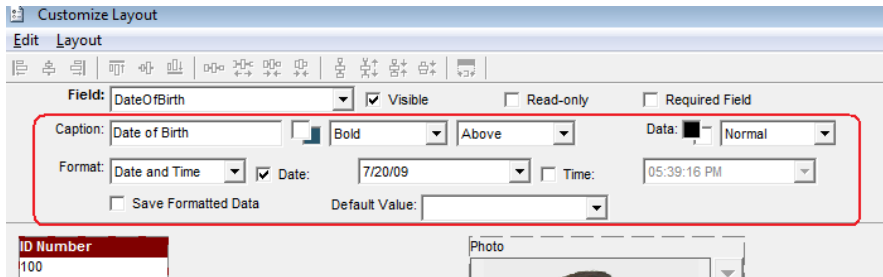
Configuring the Record Screen

ID Flow has drag-and-drop record screen formatting. Select *Edit Record Layout* from the down-arrow menu on the *Record Screen*: Size and move fields with the mouse.



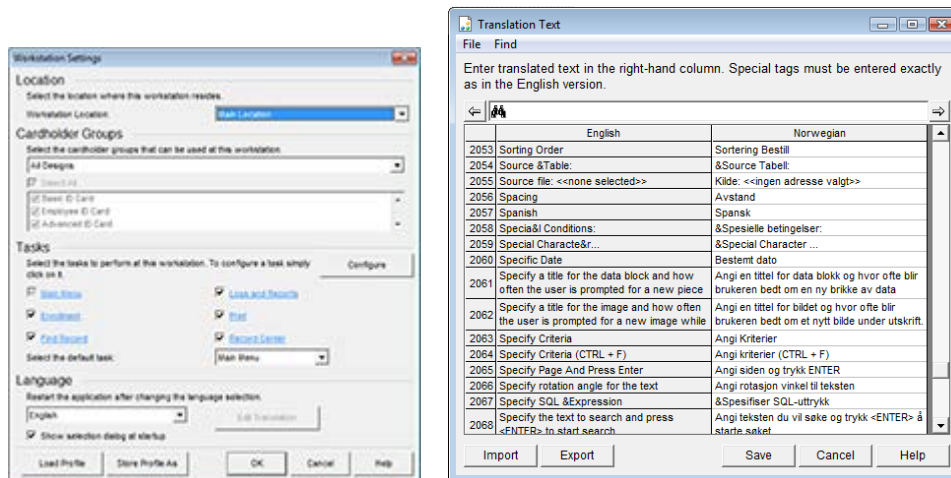
Advanced Field Formatting

ID Flow Premier Edition contains advanced field formatting. Fields may be made *Visible*, *Required* and *Read Only*. They may be given default values. Drop-down lists may be created. Text can be set to Capitalize, UPPER CASE or lower case. Image paths may be created to store variable images to file.



Configuring Language

ID Flow is available in 10+ languages. Select the language in the Workstation Settings. A translation table allows the user to make changes to the translation or to translate into a language not yet provided by Jolly. After changing languages, restart the program.



The information contained in this document represents the current view of Jolly Technologies on the issues discussed as of the date of this publication. This paper is for informational purposes only. Jolly Technologies makes no warranties, express or implied in this document. Jolly, Jolly Technologies, ID Flow, Lobby Track, and Command Line Utility are either trademarks or registered trademarks of Jolly, Inc. in the United States of America and/or other countries. The names of actual companies and products mentioned herein may be the trademarks of their respective owners.