

2900™



PHOTO ID SYSTEM

USER GUIDE

VERSION 2.4

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INTRODUCTION



1 Introduction

Congratulations on your purchase of the Avery® Photo ID System! The Avery® Photo ID System offers tremendous ease-of-use and flexibility, greatly simplifying the visitor management process. This section highlights the features and benefits of the system. The package contents will also be described in preparation for installation.

In this section:

- 1.1 Overview
- 1.2 Features and Highlights
- 1.3 Contents of the Package

1.1 Overview

The Avery® Photo ID System combines ease-of-use and flexibility in a powerful visitor management solution. Avery® Photo ID badges can be created quickly and issued for individuals and groups of visitors. The digital log creates an electronic record of your visitors, contractors or other guests. The system can be used by attendants or by the visitors themselves.

1.2 Features and Highlights

The following are just a few of the exciting features supported by the Avery® Photo ID System:

- **Color Photo ID Badges** - The system produces superior color or black and white photo IDs with over 50 customizable badge designs. Choose from a variety of badges including access control badges, fold and clip badges, fold and hang badges, self-adhesive labels and card or laminated badges. Badge sizes include both convention and business card sizes.
- **Digital Log and Reporting** - The application captures, stores and retrieves visitor records including photos. Visitor profile and activity reports can be easily created and updated from the database. Create custom or standard reports by day, week or month.
- **Easy to Use** - The Avery® Photo ID System was designed and tested for ease of use and fast visitor sign-in and sign-out. The system remembers returning visitors with quick look-up feature, allowing rapid sign-in. Visitor information can also be captured using a card reader or through pre-enrollment for fast visitor sign-in.
- **Emergency Reporting** - Reports can be generated immediately to identify all pending visitor sign-outs.
- **Network Capable** - Multiple systems can be networked to manage several entrances, exits and sites.



1.3 Contents of the Package

The package contains the following:

- Avery® Photo ID System CD-ROM
- User Guide (accessible off the Avery® Photo ID System CD-ROM, in the Documentation directory)
- QuickStart Guide

Additionally, the following components are included in the system kit only:

- Web Camera
- Barcode Scanner
- USB Hub
- Tripod
- Web camera clip
- Hardware Installation Map

INSTALLATION



2 Installation

The Avery® Photo ID System installation procedure is intended to get the system up and running, quickly and smoothly.

In this section:

- 2.1 Hardware and Software Requirements
- 2.2 Installation Recommendations
- 2.3 Installation Procedure

2.1 Hardware and Software Requirements

To install and run the Avery® Photo ID System, the following is required:

- Windows XP Home (Service Pack 1 or later) or XP Professional (Service Pack 1 or later)
- PC with a 933 Mhz processor or faster, 2.4 Ghz recommended
- 256 Mb of RAM, 512 Mb recommended
- 2.5 Gb of hard disk, 3.5 Gb recommended
- 1024x768 resolution with 24-bit color support
- 3-4 USB ports (for the camera, printer, card scanner and barcode scanner)
- Keyboard
- Mouse
- Network support



Note: The printer may also be installed on a parallel port, in which case only three USB ports are needed (for the camera, card scanner and barcode scanner) - however, performance will deteriorate significantly.

2.2 Installation Recommendations

When installing the system, consider following these hardware and software guidelines for optimal performance. Additionally, specific suggestions are available in Chapter 3.3 in this guide.


2.2.1 Hardware

- Before beginning installation, ensure that all needed components and tools are immediately available.
- Be sure to follow standard hardware installation safety procedures, such as powering off equipment and preventing static discharge.
- Install all hardware using the Hardware Installation Map before installing the application software.
- Ensure that the hardware is installed on a stable, strong surface. The camera must not be obscured and the barcode scanner should be easily reachable.



- The physical location and placement of the system should be consistent with your organization's existing security needs and protocols.

2.2.2 Software

- Close all other applications before installing the application.
 -  **Note:** Ensure all Anti-virus software and the firewall have been turned off before installing the application.
- To install the application, you will need administrator privileges. Contact your IT support team as needed.
- For emergency reporting, the application will ask for SMTP mail settings, available from your IT support team. Have these ready before beginning installation.
- The application requires a minimum of 275 megabytes available - without this, it may not install or function.


2.3 Installation Procedure

2.3.1 Hardware Installation

The hardware installation process is largely dependent on the peripherals (web cameras, printers and scanners) available. Follow the installation instructions supplied with your hardware.


2.3.1.1 Printer

Follow the installation instructions supplied with your hardware. The following settings are highly recommended, if available:

-  **Note:** Printer settings are available through your printer's preferences menu. For information on how to set your print preferences, reference your printer's manual. Incorrect print settings may cause unexpected results.
- Set print quality to medium (often called **Text & Images**). Higher print quality produces more attractive badges, but take longer to print.
- Set the paper quality to **photo quality ink jet**.
- Set the paper dimensions to **User Defined**. Name the custom paper **Avery® 4x6**. The width should be **400** and the height **600**. Units should be **0.01 inches** if available.
- Set orientation to **portrait**.
- Turn **off** any printer notification messages.

2.3.1.2 Card Scanner

Follow the installation instructions supplied with your hardware.

-  **Note:** The application supports scanning of business cards and drivers licenses only if SDK version 8.14 or later and "BizCOM_setup.exe" Version 2.0.0.1 or later has been installed.

If you are scanning any card for the first time, you may be prompted to calibrate the scanner. Insert the calibration paper, and then click

**Calibrate.**

Note: Ensure that the card scanner is connected to the same USB port where you have installed the driver.



Note: Connect the card scanner to the USB port before starting the Avery® Photo ID System.

2.3.2 Software Installation Overview

The Avery® Photo ID System installer is designed to support easy installation. The Avery® Photo ID System installer will detect if there is any previous version of the Avery® Photo ID System installed. If found, you will be prompted to upgrade to Avery® Photo ID System Express 2.4.

2.3.3 New Installation of Avery® Photo ID System Express 2.4

The suggested defaults are recommended, but may be changed if dictated by IT personnel. You must have a valid License Number ready for use (found inside the software CD jewel case) and ensure that all hardware is already installed.



Note: Windows administrator or equivalent access is required to perform the following steps.

The software can be installed with just the server, just the client or both (complete). The client software refers to the database where badge designs, system and station settings and user accounts are stored. The server software refers to the database where visitor data records are stored. You must have at least one server and at least one client installed to use the system. You may also have several client installations connected to a single server.

The following list describes the options you have to install the Avery® Photo ID System.

- **Complete Installation** – This is the simplest set-up and installs a single client and server on this computer. Use it if you plan to use only a single station or plan to connect other clients to this station's server. This is also known as a stand-alone installation.
- **Custom: Server Only Installation** – This installs only the server software. If you have a data center, plan to have multiple networked stations or wish to improve security by running the server software and client software on separate systems, use this installation procedure.
- **Custom: Client Only Installation** – This installs only the client software for connection to an existing server. Use this method if your site already has a central server or you need to add a station to an existing complete system.

2.3.3.1 Complete Install

The **Complete Install** is the simplest mechanism for installing the Avery® Photo ID System. Use this setting if you need only a single station or do not plan on networking multiple stations together. No



network connection is required.

1. Insert the Avery® Photo ID System CD into the CD-ROM drive. The installer process should begin automatically. If not, use Windows Explorer to navigate to the CD-ROM drive and double-click **Start.exe**.
2. The **Photo ID System** screen is displayed. Select **User Manual** or **Quick Start Guide** to view the corresponding documents. Click **Install** to install the Photo ID System.
3. The **Preparing to Install** dialog box appears. Click **Next** to continue.
4. The license agreement appears. Read it carefully and click **I Accept** if the conditions are acceptable to you.



Note: You must accept the license agreement to use the Avery® Photo ID System.

5. Select the **Complete** installation option.
6. Select the installation directory you prefer. The default installation path is **C:\Program Files\Photo ID System**. Unless you need to install in another location, the default settings are recommended. Click **Next**.
7. Select a program folder and click **Next**. The default is **Avery Photo ID System**.
8. You are prompted for the **License Number**. Enter the Avery® Photo ID System License Number, found inside the software CD jewel case. A valid number must be entered to continue. Click **Next** to continue.
9. Review all of your installation settings carefully. Click **Next** to begin full installation.
10. The installation may require several minutes to complete.
11. Upon completion, view the **README** file. It contains release notes, additional product information, and other important material. Click **Finish** when complete.





Note: You can still connect remote stations to a **Complete Install**. You only need to install the client on the additional stations. Refer to the instructions in Chapter 2.3.3.3 for instructions on how to add a client station.

2.3.3.2 Custom: Server Only Install

If you plan to run the Avery® Photo ID System in a network environment, but would prefer to keep the server portion of the application separate from the client, follow these instructions. By keeping the server separate from the client, the server can be kept in a safe, secure location. In this setting, you will need a network connection and possible IT support.

1. Insert the Avery® Photo ID System CD into the CD-ROM drive. The installer process should begin automatically. If not, use Windows Explorer to navigate to the CD-ROM drive and double-click **Startup.exe**.
2. The **Photo ID System screen** is displayed. Select **User Manual** or **Quick Start Guide** to view the corresponding documents. Click **Install** to install the Photo ID System.



3. The **Preparing to Install** dialog box appears. Click **Next** to continue.
4. The license agreement appears. Read it carefully and click **I Accept** if the conditions are acceptable to you.
 **Note:** You must accept the license agreement to use the Avery® Photo ID System.
5. Select the **Custom** installation option.
6. Select the installation directory you prefer. The default installation path is **C:\Program Files\Photo ID System**. Unless you need to install in another location, the default settings are recommended. Click **Next**.
7. Select a program folder and click **Next**. The default is **Avery Photo ID System**.
8. Uncheck the **Client Installation** box. Confirm that the destination folder is correct and that you have enough disk space. Click **Next**.
9. For a licensed copy, you are prompted for the **License Number**. Enter the Avery® Photo ID System License Number, found inside the software CD jewel case. A valid number must be entered to continue. Click **Next** to continue.
10. Enter your preferred server name (IP address or URL) and Application Server and Database Server ports. It is highly recommended you use the default **localhost** server name and default port settings of **8080** and **3306**, respectively. Click **Next** to continue.
 **Note:** Server name and port settings are advanced topics. Consult your IT support team for guidance if you need to make any changes.
11. Review all of your installation settings carefully. Click **Next** to begin custom installation.
12. The installation may require several minutes to complete.
13. Upon completion, view the **README** file. It contains release notes, additional product information, and other important material. Click **Finish** when complete.
14. Record the system's DNS entry or IP address and ports, if they were changed for use on **Client Only** installations. Consult your IT support team as necessary.
15. The system does not require rebooting and the server is ready for immediate use!



2.3.3.3 Custom: Client Only Install

In order to use a **Client Only** installation, the Avery® Photo ID System server must be installed via either the **Complete** or **Server Only** installations. Ensure that a server is installed before continuing. You can install multiple clients by repeating this process at every station location. In this setting, you will need a network connection and possible IT support.

1. Insert the Avery® Photo ID System CD into the CD-ROM drive. The installer process should begin automatically. If not, double-click **Startup.exe**.
2. The **Photo ID System screen** is displayed. Select **User Manual** or **Quick Start Guide** to view the corresponding documents. Click **Install** to proceed with the installation of the Avery® Photo ID System.
3. The **Preparing to Install** dialog box appears. Click **Next** to continue.
4. The license agreement appears. Read it carefully and click **Yes** if the conditions are acceptable to you.



Note: You must accept the license agreement to use the Avery® Photo ID System.

5. Select the **Custom** installation option.
6. Select the installation directory you prefer. The default installation path is **C:\Program Files\Photo ID System**. Unless you need to install in another location, the default settings are recommended. Click **Next**.
7. Select a program folder and click **Next**. The default is **Avery Photo ID System**.
8. Uncheck the **Server Installation** box. Confirm that the destination folder is correct and that you have enough disk space. Click **Next**.
9. You are prompted as to whether you want to install application icons on the **Desktop** or **Start Menu**. It is recommended you select at least one option. Otherwise, it is necessary to go to the installation directory to launch the application.
10. Enter the existing server name (IP address or URL) and Application Server port. The server name is either the DNS name (i.e., **photoID.companyname.com**) or the IP address (i.e., **192.168.1.2**) of the installed server. The default Application Server port setting is **8080** and does not need to be changed unless it was changed during server installation. Consult your IT support team as necessary. Click **Next** to continue.
11. Review all of your installation settings carefully. Click **Next** to begin custom installation.
12. The installation may require several minutes to complete.
13. Upon completion, view the **README** file. It contains release notes, additional product information, and other important material. Click **Finish** when complete.
14. The system does not require rebooting and application is ready for immediate use!



Note: The first time you launch a **Client Only** install; you are



prompted for the administrator **username** and **password** for the server to which you are connected. You must also enter a unique **Station Name** before you can continue.

2.3.4 Upgrade From Avery® Photo ID System Express 1.x / 2.x

Any previous installation of Avery® Photo ID System Express 1.0, Express 1.1 (NA), Express 2.0, Express 2.2 and Express 2.3, will be upgraded to Avery® Photo ID System Express 2.4 by the Avery® Photo ID System installer.



Note: Windows administrator or equivalent access is required to perform the following steps.

All existing data will be available in the new Avery® Photo ID System Express 2.4. All previous installation settings will be maintained during upgrade. The installer will upgrade the previous Complete Installation, Custom Server only or Custom Client only installation.



Note: If a Server installation has been upgraded then it is necessary to upgrade all Client installations, which connect to it or the Avery® Photo ID System will not function correctly. Similarly, if a Client installation has been upgraded then the Server installation it connects to must also be upgraded.

1. Insert the Avery® Photo ID System CD into the CD-ROM drive. The installer process should begin automatically. If not, use Windows Explorer to navigate to the CD-ROM drive and double-click **Start.exe**.
2. The **Photo ID System** screen is displayed. Select **User Manual** or **Quick Start Guide** to view the corresponding documents. Click **Install** to install the Photo ID System.
3. A pop-up window is displayed informing the user that the existing Avery® Photo ID System will be upgraded. Click **Yes** to continue.
4. The **Preparing to Install** dialog box appears. Click **Next** to continue.
5. The **Resuming the Install Shield Wizard** dialog box appears. Click **Next** to continue.
6. The installation may require several minutes to complete. Click **Finish** when complete.
7. If a Client or a Server installation is being upgraded, then a Warning message appears stating: "Ensure the client(s)/server component is upgraded for the smooth functioning of the Photo ID System Express 2.4". Click **OK**.
8. The system does not require rebooting and can be used immediately!



2.3.5 Software Uninstall

Should you want to remove any of the Avery® Photo ID System, follow these steps:

1. Select **Add or Remove Programs** from the Windows Control Panel.
2. Select **Avery® Photo ID System** and click **Change/Remove**.
3. You are presented with the option to delete application data files. If you installed both client and server components, you may choose to uninstall just one or the other. To completely remove the application and all data associated with it, ensure that both options are checked.
4. Uncheck the **Delete Extra Client** data files box, if you plan on reinstalling a client using the existing application settings. To remove all settings, check this option.

Uncheck the **Delete Extra Server** data files box, if you want to keep all your application data intact. If you just need to reinstall the server components, leave it unchecked. To remove all records, check this option.



Note: If this option is checked, all badge records will be permanently destroyed, without possibility of recovery. Use this option with caution.

5. Click **Next** and the uninstall process begins.
6. Click **Finish** when complete.



Note: Windows may leave directories behind after uninstalling the software. This is normal behavior.

GETTING STARTED



3 Getting Started

The Avery® Photo ID System can be easily used with the default configuration, enabling badges to be printed immediately after set-up. As you become more comfortable with the application, you can customize many of its features to the needs of your organization.

In this section:

- 3.1 Launch the Application
- 3.2 Personalize the Avery® Photo ID System
- 3.3 Tips For Best Results

3.1 Launch the Application

After the installation process, the Avery® Photo ID System is ready to run and is able to print badges and handle visitors within minutes. This section describes the initial settings and the default system settings.

3.1.1 Account and System Set-up

The first time the Avery® Photo ID System is run it prompts the user for basic settings. These settings can be changed later in the **Administrator** mode.

Procedure

1. Double-click the **Photo ID System** icon to run the application. The **Account and System Set-up** screen appears.
2. Fill in the set-up information for the administrator account. Provide a **username** and a **password**, then re-enter the **password** to confirm. This account will allow full access to the Avery® Photo ID System, so avoid easily guessed passwords. Usernames must be between 4 and 100 characters with no spaces.
3. Add your organization's name and select the station name. Using a unique name for each station (i.e., **Front Lobby 1**) is highly recommended.
4. Click **Done** when finished. The data is saved and the application is ready for use.

3.1.2 Use the Default Visitor Settings

The Avery® Photo ID System can be used immediately in the **Visitor** mode, with no customization needed. Simply follow the steps below and the on-screen instructions.

Procedure

1. Double-click the **Photo ID System** icon to run the application. The **Log In** screen appears.
2. Log-in as an administrator or attendant if you have created an attendant account. The **Select a Station** mode screen appears. Click **Visitor**. The **Choose A Visitor Mode** screen appears (**Sign-In Only Mode, Scan In Only Mode, Full Visitor Mode**). Select the **Sign-In Only** mode. The **Welcome** screen appears.



3. A visitor badge can now be created and printed, following the on-screen steps. For further reference, refer to Chapter 6 in this guide.
4. To leave the **Visitor** mode, click the small lock icon at the lower right of the screen. Enter an administrator or attendant **username** and **password**, and then click the check-box icon. Three buttons appear. Click **Exit**.



To leave the **Visitor** mode, click the lock icon and enter a **username** and **password**, and then click the check-box icon.

3.1.3 Use the Default Attendant Settings

The Avery® Photo ID System's default attendant settings enable the system to be used with no customization needed.

Procedure

5. Double-click the **Photo ID System** icon to run the application. The **Log In** screen appears.
6. Log-in as an administrator or attendant. The **Station** mode screen appears. Click **Attendant**. The **Attendant** mode screen appears. The default setting is **Create a Badge** (top navigation bar). A **Getting Started** screen will appear the first time you launch the **Attendant** mode. This screen gives a short explanation of the attendant navigation bar.
7. The default badge design is a single day badge, with a photo. To change this, select an alternative badge from the drop-down list box. The badge is previewed to the right. Follow the on-screen steps to create and print a badge. For further reference, refer to Chapter 5 in this guide.
8. To exit the **Attendant** mode, click **Main Screen** at the top right of the screen.



3.2 Personalize the Avery® Photo ID System

The application allows a very wide range of customization to fit your organization's needs. Below are the most common methods for personalizing the application. Refer to Chapter 4 in this guide for additional details.



Note: To customize the application, you must first log-in as an administrator.

3.2.1 Change the on-screen organization name and logo

1. Select the **Administrator** mode. The **Badge Designs** screen appears. A **Getting Started** screen will appear the first time you launch the **Administrator** mode. This screen gives a short explanation of the administrator navigation bar.
2. Select **Station Options** on the top navigation bar. The **Station Options** screen appears.
3. At the lower right, under **On-Screen Name & Logo**, click **Modify**. The **On-Screen Name & Logo** dialog box appears.
4. Enter a new organization name and optionally, load the organization's logo. The logo must be in JPEG or SWF format. Refer to Chapter 4.2.4 in this guide for additional image information.
5. Click **Save** when finished. The new branding appears in the **Visitor** mode.

3.2.2 Add new user accounts to the system

1. Select the **Administrator** mode. The **Badge Designs** screen appears.
2. Click **System Options** on the top navigation bar. The **System Options** screen appears.
3. At the top left, under **User Accounts**, click **New**. The **User Accounts** dialog box appears.
4. Enter a new **username** and **password** and select an access level. Administrators have full access to every area of the system. Attendants can only access the **Visitor** and **Attendant** modes. Usernames must be between 4 and 100 characters, with no spaces.
5. Click **Save** when finished. The new user appears in the **User Accounts** list box and can be used immediately.

3.2.3 Change the default badges for the Visitor and Attendant modes

1. Select the **Administrator** mode. The **Badge Designs** screen appears.
2. Select **Station Options** on the top navigation bar. The **Station Options** screen appears.
3. At the top left, under **Badge Design Defaults**, click **Modify**. The **Badge Design Defaults** dialog box appears.
4. Using the drop-down list boxes, select a new default design for the **Visitor** and **Attendant** modes. The new default is previewed on the right.



5. Click **Save** when finished. The new default badges appear in the **Visitor** and **Attendant** modes.



Note: Be sure that the badge paper type in the printer matches the type specified in the badge template.

3.3 Tips for Best Results

The Avery® Photo ID System is ready to run immediately. However, the following suggestions may improve the system performance and enhance efficiency.

3.3.1 Optimize Hardware Set-up

The physical dimensions and location of the station can significantly improve utilization of the system.

- Ensure that the station is located in a position that allows users to quickly see it. Consider avoiding corners of the room.
- The monitor should be eye-level with the users, attendants or visitors.
- The user's hands should rest naturally on the keyboard, with the elbows bent at approximately a 90-degree angle.
- The mouse or pointing device should be located near the keyboard and ideally convenient for both right- and left-handed users.
- At least one station should be available for visitors in wheelchairs.
- Ensure that the printer is set to output in portrait orientation.
- Be sure that the badge paper product matches the badge design, as selected in Step 2 of the badge design process. Refer to Chapter 4 in this guide.
- Consider installing an uninterruptible power supply (UPS) for the systems in locations prone to power outages.
- Conduct regular back-ups.

3.3.2 Optimize Photo Quality

To improve the photo quality, there are two considerations: the quality of the input (the camera) and the quality of the output (the printer). Guidelines for improving both are provided below.

- Ensure that the camera is not directly facing any light sources, including windows or glass doors.
- Some cameras offer backlight compensation (accessible through the **Control Panel**), which can dramatically improve image quality.
- If possible, the background should be matte or non-reflective.
- The visitor's face should be well illuminated.
- Adjust the camera settings such as brightness, contrast and resolution, as needed.
- The camera should be adjustable to accommodate both tall and short visitors.



- Increase image quality settings to highest in the printer control.
- Use only Avery® Photo ID badge products.

3.3.3 Adjust Badge Print Speed

Badge printing speed will vary by the model and settings of your printer. The following are suggestions for improving print speed.

- Consider reducing the amount of design elements on your badge and increasing the white space.
- Keep the badge text to the minimum needed.
- Consider using badge designs without photographs.
- Adjust the printer's settings to increase print speed and decrease image quality (i.e., black and white instead of color).
- Consider installing multiple Avery® Photo ID System stations in high traffic areas.

3.3.4 Decrease Wait Time

Wait time is influenced by several factors, as discussed earlier. The best solution to decrease wait time in high traffic areas is to increase the available stations as traffic increases. Suggestions for decreasing wait time are also listed below.

- In areas of high traffic, install multiple Avery® Photo ID System stations.
- Prominently position the badge station to increase visibility.
- Ensure that the printer is located nearby for easy badge retrieval.
- Whenever possible, pre-print badges for expected visitors.
- Optimize badge print speed (as noted above).
- Enable the unique identifier field and set it to required.
- Set-up the station to allow easy access to new visitors and easy exit once a visitor has issued a badge.
- Avoid harsh glare by positioning the monitor so that it does not face a window, door or other direct light source.

ADMINISTRATOR TASKS



4 Administrator Tasks

In the **Administrator** mode, you can customize the Avery® Photo ID System station in several ways. In **Badge Designs**, you can create, customize, and remove badge designs. In **Station Options**, administrators can customize the interface to show modified on-screen messages as well as on-screen organization name and logo. In **System Options**, administrators can manage users, hardware, and emergency reporting protocol. In **Maintenance**, you can easily backup and restore your data and settings with a click of a button. In **Reports**, administrators can create detailed, specialized reports to track visitors' statistics. Also addressed are database considerations at the beginning of the chapter.

In this section:

- 4.1 Badge Design
- 4.2 Station Options
- 4.3 System Options
- 4.4 Reporting



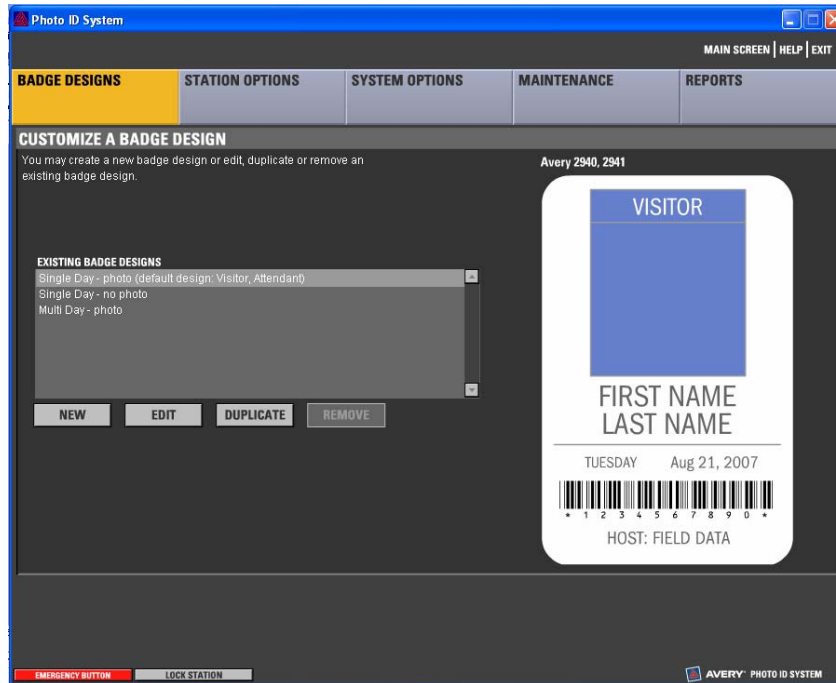
4.1 Badge Design

4.1.1 Create a New Badge Design

Administrators can create new designs for use in the **Attendant** and **Visitor** modes.

Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click **Administrator**. The **Badge Designs** screen appears.



The Badge Designs screen in the Administrator mode



Note: To preview an existing badge design, click the badge design name in the list. The Avery® media SKU for the selected badge is displayed in the preview.

2. A scrolling list on the left side of the screen displays existing badge designs. To create a new badge design, click **New**. The **Badge Options** dialog box appears. This process has four steps. The **Step 1: Choose Primary Badge Use** screen appears.
3. Read the on-screen description of each primary badge use: **Visitor**, **Event** or **Long-Term**. Select the desired use and click **Next**. The **Step 2: Select Avery Product** screen appears.
4. Select the preferred Avery® badge type from the available list. The list shows possible print orientations. The badges can be printed as landscape or portrait. Click the option beside the preferred product and click **Next**. The **Step 3: Select a Template** screen appears.



Note: Be sure that the badge paper type in the printer matches the type specified in the badge template.



5. Select a badge template by clicking an option in the available list. A preview appears on the right. Once a template is selected, click **Next**. The **Step 4: Customize Badge Template** screen appears.



Note: The template determines three things: first, the overall appearance of the badge design; second, the type of information shown on the badge design; and third, where that information appears on it.

6. The **Badge Options** dialog box closes and the **Badge Designs** screen appears.

To change any of the defaults, click the title bar button of the desired attribute. Changes appear in the badge preview on the right. If no changes are required, click **Done**. You will be asked to name your newly created badge design. Once you have named your badge design and saved it, you will be able to select it from the list of badge designs.



The *Badge Options* screen in the *Administrator* mode

Font Type

- Use **Font Type** to select a type style. The current selection appears in the preview area. Use the drop-down list box to change the type style.

Custom Badge Field

- Some templates provide an extra badge field that the attendant or visitor must fill in during sign-in. Administrators can enable, disable, and change this field. For example, the attendant or visitor can use this field to enter a host name.
- To add a custom badge field, enter a label for the field of up to 20



characters. The name appears on the screen and prompts the visitor or attendant. For example, enter **Host Name** in the **Field Name** box. When this badge design is used, attendants and visitors will be required to enter a **Host Name**, such as **Jane Smith**.



Note: The field will appear blank in the **Attendant** and **Visitor** interface.

- When the badge prints, the field's contents will be printed on it. In this case, it is **Jane Smith**. By default, the field's label is not printed. To allow the field's label to print as well, check **Print Field Name as Prefix on Badge**. With that box checked, the badge will now print **Host Name: Jane Smith**.

Visitor Type

- Use **Visitor Type** to create, edit and delete types of visitors.
- To create a new visitor type, click **New**. In the entry box, type a name for the new visitor type. Then click **OK**.
- To edit an existing visitor type, click the visitor type name and then click **Edit**. Make the desired changes, then click **OK**.
- To delete a visitor type, click the visitor type name and then click **Remove**.

Color Coding

- Color coding changes the background color of the badge, based on either the visitor category or the day of the week. The settings can be easily changed.
- To color code by day of the week, click **By Day of the Week**. A list appears, assigning a color to each day of the week. To change these colors, refer to the instructions below. Note that the preview only shows the color for the current day of the week.
- To color code by visitor category, click **By Visitor Type**. A list appears, assigning a color to each visitor category. To change these colors, refer to the instructions below. Note that the preview only shows the Visitor badge type.
- To change a color, click the rectangular color swatch. A dialog box appears. Click on another color in the palette or specify a custom color. To specify a custom color, use standard hexadecimal code: **#RRGGBB**, where **RR** is red, **GG** is green and **BB** is blue. For example, **#0000FF** is the hexadecimal code for navy blue. (Many complete charts of colors and their hexadecimal codes are available on the Internet. Refer to the glossary for more details.) Press **Enter** to set the color.

Custom Badge Message

- Some templates provide for an additional message on the badge, such as **Escort Required**. To use a custom badge message, enter up to 30 characters into the text box.



Note: Visitors and attendants cannot access or modify this message.



Back Text

- Some templates provide for an additional message on the back of the badge. To use back text, enter up to 900 characters into the text box.



Note: Visitors and attendants cannot access or modify this message.

Adding Organization Name/Logo

- Use the **Organization Name/Logo** tab to specify an organization name or a logo to appear on the badge. To add a name, click the **Name** radio button and type in a name. To add a logo, click the **Logo** radio button and follow the on-screen instructions regarding logo size. Click **Import**.



Note: The logo file must be in either JPEG or Macromedia Flash® SWF format with a white or transparent background. The SWF format produces higher-quality printed images.

7. Review the badge design preview to the right. To make a change, click **Back** to return to the previous step. Otherwise, click **Done**. The main design screen appears. The badge design is now finished and can be used immediately.



Note: When the system is in the **Visitor** mode, only the default design is available for printing.

4.1.2 Edit a Badge Design

Administrators can edit the badge design options of existing badge designs.

Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click **Administrator**. The **Badge Designs** screen appears.
2. To view an existing badge design, click the design name to preview it. To edit a design, click its name then click **Edit**. The **Badge Options** dialog box appears.



Note: Only badge design options in Step 4 can be edited. To edit all options (including paper type and orientation), you will need to create a new badge design.

3. To change any of the defaults, click the title bar button of the desired attribute. Follow the same process as described in Step 6 of Chapter 4.1.1 in this guide. Changes appear in the preview on the right.
4. Review the badge design preview to the right. To cancel all changes, click **Cancel**. Otherwise, click **Done**. The main badge design screen appears. The badge is now updated and can be used immediately.

4.1.3 Duplicate a Badge Design

Administrators can duplicate existing badges. This is particularly useful if several similar badges with slight variations are required. The duplicates can be edited as described earlier.



Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click **Administrator**. The **Badge Designs** screen appears.
2. To view an existing badge design, click the name to preview the badge design. To duplicate a design, select the desired design and click **Duplicate**.
3. Enter a new name for the badge design. Click **Save**. The new badge appears in the menu list and is editable.



Note: Only the badge design options can be edited for an existing badge. To edit all options (including paper type and orientation), you will need to create a new badge.

4.1.4 Remove a Badge Design

Administrators can remove badge designs. Once a badge design is removed, it cannot be recovered.

Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click on **Administrator**. The **Badge Designs** screen appears.
2. To view an existing badge design, click the name to preview the design. To remove a design, select it and click **Remove**. Confirm the decision when prompted. A badge design cannot be recovered after it is deleted.
3. Click **Yes** to remove the badge design. The badge design will disappear from the list on the badge design screen.



Note: The list must always contain at least one badge design.

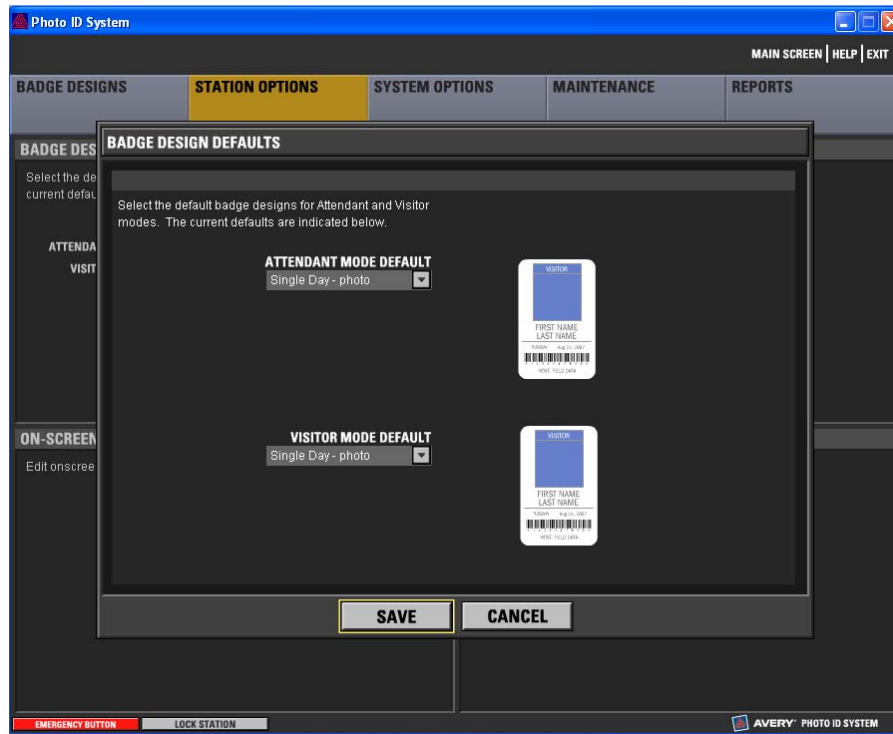
4.2 Station Options ---

4.2.1 Set Default Badge Designs

Administrators can set the default badge designs for the **Attendant** and **Visitor** modes. In the **Attendant** mode, an alternate badge design can be selected other than the default. In the **Visitor** mode, only the default badge design is available.

Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click **Administrator**. The **Badge Designs** screen appears.
2. Click **Station Options** on the top navigation bar. The **Station Options** screen appears.
3. At the top left, the current default badge designs are listed. To change these, click **Modify**. The **Badge Design Defaults** dialog box appears.



The *Badge Design Defaults* screen in the *Administrator* mode.

4. The **Attendant** and **Visitor** modes default badge designs are listed, with a preview for each on the right. To change the default badge design, select a new badge from the appropriate drop-down list box. The new badge design is previewed. After you finish, click **Save**. The **Station Options** screen appears.
5. In the upper left, the new default choices are displayed.

4.2.2 Set Unique Identifiers

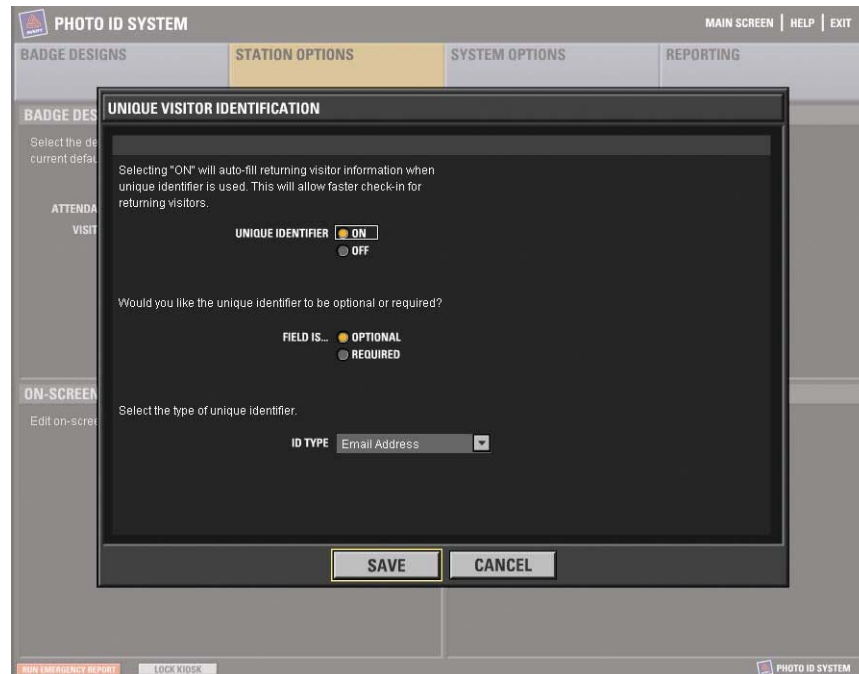
Administrators can customize the settings of the unique identifiers. The application uses unique identifiers (an E-mail address) to allow quick sign-in for returning visitors. Reporting also uses unique identifiers to track visitors.



Note: The unique identifier offers an additional way to track and identify visitors, and allows a returning visitor to recall their previously entered information and photo. Note that a returning visitor will be assigned a new barcode each time a fresh badge is issued.

Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click **Administrator**. The **Badge Designs** screen appears.
2. Click **Station Options** on the top navigation bar. The **Station Options** screen appears.
3. At the top right, the current unique identifier setting (on or off), status (optional or required) and type (E-mail address) are displayed. To update the setting or station options, click **Modify**. The **Unique Visitor Identifier** dialog box appears.



The *Unique Visitor Identifier* dialog box in the *Administrator* mode.

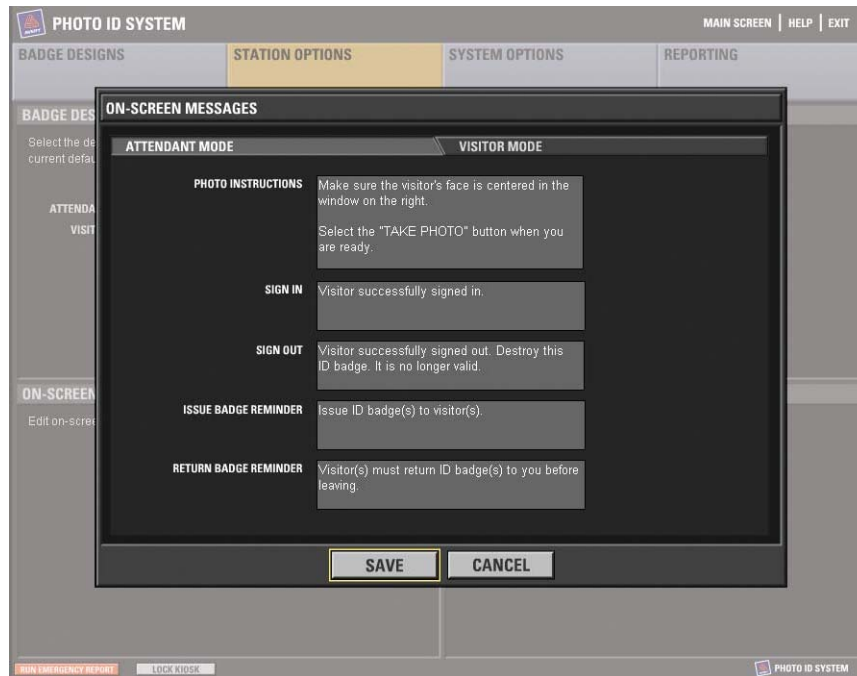
4. Following the on-screen instructions, customize the unique identifier. Click **Save** when finished. The **Station Options** screen appears, with the new choices displayed. The unique identifier can be set-up as follows:
 - Select **ON** to activate the unique identifier or **OFF** to deactivate it.
 - Select **Optional** if visitors choose to provide a unique identifier or **Required** if all visitors must provide one.
 - **E-mail Address** is the unique identifier.

4.2.3 Customize On-Screen Messaging

Administrators can update the instructive on-screen messaging for the **Attendant** and **Visitor** modes. This messaging supports the sign-in and sign-out processes.

Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click **Administrator**. The **Badge Designs** screen appears.
2. Click **Station Options** on the top navigation bar. The **Station Options** screen appears.
3. At the bottom left, click **Modify**. The **On-screen Messages** dialog box appears.



The *On-screen Messages* dialog box in the *Administrator* mode.

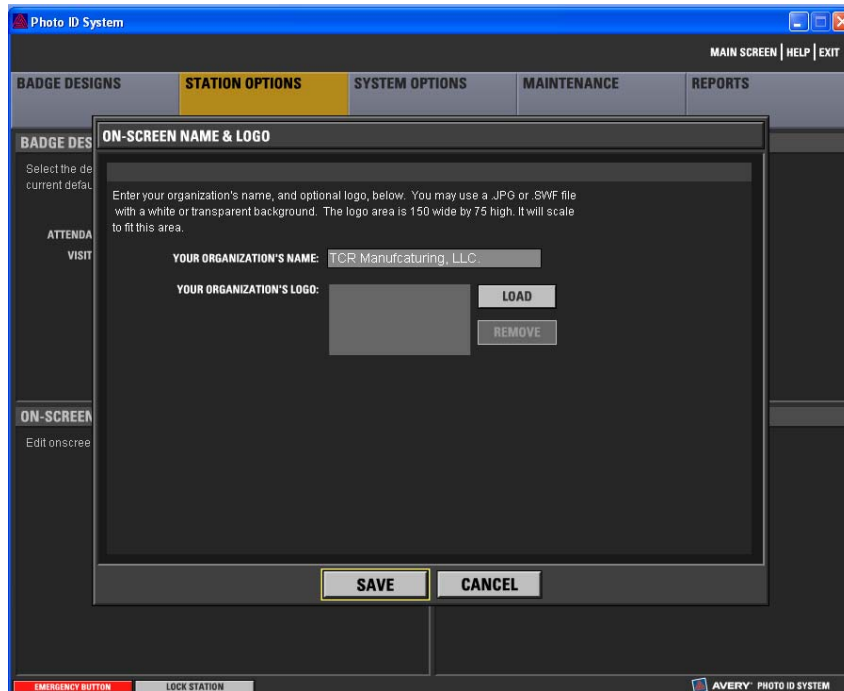
4. At the top of the dialog box, select either the **Attendant** or **Visitor** modes. Enter instructions for each desired field. Click **Save**. The **Station Options** screen appears.
5. To see the changes, exit the **Administrator** mode and enter the **Attendant** or **Visitor** modes, discussed in Chapters 5 & 6 in this guide.

4.2.4 Add Name and Logo to the Avery® Photo ID System

Administrators can add an organization's name and logo to the Avery® Photo ID System user interface.

Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click **Administrator**. The **Badge Designs** screen appears.
2. Click **Station Options** on the top navigation bar. The **Station Options** screen appears.
3. At the lower right, click **Modify**. The **On-screen Name & Logo** dialog box appears.



The *On-screen Name & Logo* dialog box in the **Administrator** mode.

4. Enter the organization's name and optionally include a logo. The logo must be a SWF or JPEG with a white or transparent background. Ensure that the dimensions match those listed. Click **Save**. The **Station Options** screen appears.
5. To see the changes, exit the **Administrator** mode and enter the **Visitor** mode, discussed in Chapters 5 & 6 in this guide.

4.3 System Options

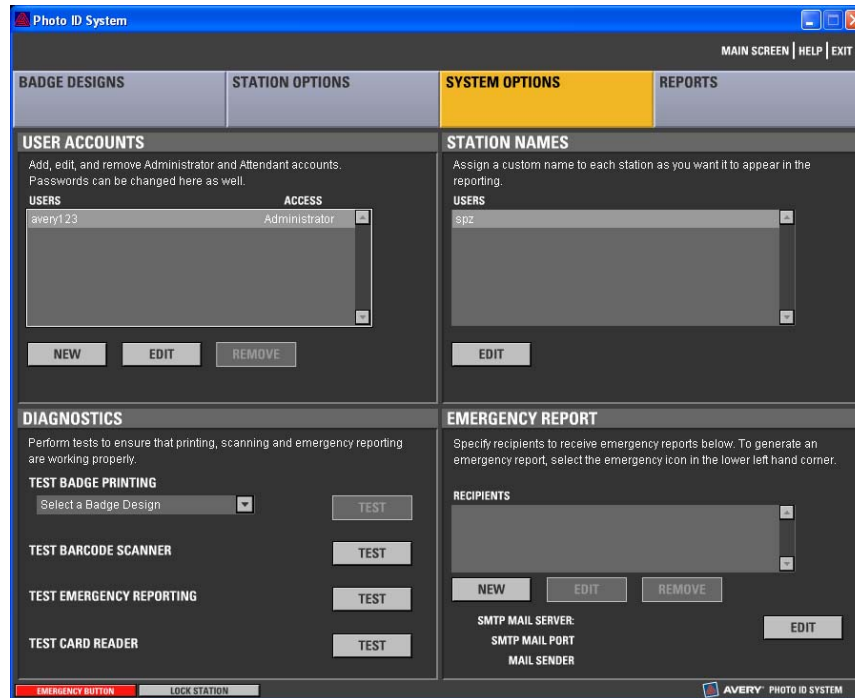
4.3.1 Create User Accounts

Administrators can create and edit administrator and attendant accounts in **System Options**, including usernames and passwords. The default administrator account cannot be deleted. There are three types of accounts:

- Administrators have full access to the entire system, can generate reports, add, edit and remove users and badges and configure the interface.
- Attendants can check-in and check-out visitors, pre-print badges, check-in groups of visitors and generate reports.
- Visitors can only check themselves in and out.

Procedure

1. Log-in as an administrator. The **Station Mode** screen appears. Click **Administrator**. The **Badge Designs** screen appears.
2. Click **System Options** on the top navigation bar. The **System Options** screen appears.



The *System Options* screen in the *Administrator* mode.

- At the top left, users and their access levels (**Administrator** or **Attendant**) are listed.



Note: At least one administrator account must always exist. Once removed, a user account cannot be recovered.

- To create a new user, click **New**. The **User Accounts** dialog box appears. Enter the **username**, select the **access level** and type the **password** twice. The username must be between 4 and 100 characters with no spaces. The password must be 4-10 characters long. Click **Save** to add the user. The **User Accounts** dialog box closes and the new account is saved.
- To edit a user, click the user's name, then click **Edit**. The **User Accounts** dialog box appears. The username, access level or password can be changed, with the constraints listed above. Click **Save** to submit the changes. The **User Accounts** dialog box closes.



Note: If a password is lost, the only option is to set a new password for that account.

- To remove a user, click the user's name and then click **Remove**. A **Confirmation** dialog box appears. To delete a user, click **Yes**. The **User Accounts** dialog box closes. A user once deleted cannot be recovered.
- Repeat Step 3 as needed. Use new and edited users during the next log-in. Removed users are removed immediately.



4.3.2 Name Avery® Photo ID System Station

Administrators can change the name of existing Avery® Photo ID System stations that are on the network.



Note: The list of stations is automatically pre-populated by the software. Station names do not need to be unique, but should be.

Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click **Administrator**. The **Badge Designs** screen appears.
2. Click **System Options** on the top navigation bar. The **System Options** screen appears.
3. At the top right, all live Avery® Photo ID System stations are listed. To change a station's name, click the desired station and then click **Edit**. The **Station Name** dialog box appears.
4. Enter a new name for the station. Click **Save**. The dialog box closes.
5. Repeat Steps 3 and 4 as needed. Updates are displayed immediately.

4.3.3 Use Diagnostic Tools

Administrators can test the barcode scanner, print functionality, card reader and emergency reporting. If problems exist, refer to Chapter 7 in this guide.

Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click **Administrator**. The **Badge Designs** screen appears.
2. Click **System Options** on the top navigation bar. The **System Options** screen appears.
3. At the bottom left, diagnostic tools are listed, with the **Test** buttons located to the right.
 - To test badge printing, select a badge design from the drop-down list box and click **Test** to print the badge.
 - To test the barcode scanner, click **Test**. Scan a badge. If the badge is successfully scanned, a message appears. If it fails, no message is displayed.



Note: The barcode scanner test does not validate badges. It only ensures that the scanner is working.

- To test emergency reporting, click **Test**. An emergency report is displayed on screen and is e-mailed to the recipients as listed under **Emergency Report**, if enabled.
- To test the card scanner, click **Test**. The **Scan Visitor's Information** pop-up window is displayed. Select **Driver's License** or **Business card** option.



Note: If **Driver's License** is selected, then the country and state may be selected. The default option for **Driver's License**



is auto select that automatically detects the country and state of the driver's license. If auto select fails, then an error message is displayed. In this case, try selecting the country and state and scanning the driver's license.

- Scan a card. If the card is successfully scanned, a message is displayed. If it fails, an error message is displayed.



Note: If calibration is required, then a message to calibrate the scanner is displayed. User can also click **Calibrate** to calibrate the scanner.

4.3.4 Customize Emergency Reports

Administrators can edit the list of emergency report recipients, SMTP server settings and trigger a report to run immediately. IT support may be needed.



Note: In order for the emergency reporting to send a report, the station must be connected to the company's LAN and have access to the SMTP server.

Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click **Administrator**. The **Badge Designs** screen appears.
2. Click **System Options** on the top navigation bar. The **System Options** screen appears.
3. At the lower right, emergency report functionality is available.
 - To add a new recipient to the emergency list, click **New** and enter a new E-mail address. Click **Save** when finished. The new address appears.
 - To edit a recipient, select the recipient and then click **Edit**. Update the E-mail address and click **Save**. The updated address appears.
 - To remove a recipient, select the recipient, and then click **Remove**. The recipient disappears from the list. Once deleted, recipients cannot be recovered.
 - To update the SMTP mail server settings, click **Edit**. Enter updated SMTP mail server, port number and mail sender data. Click **Save** when finished. The new settings are active.



Note: The SMTP settings must be correct to send E-mails.



4.4 Reporting

A detailed report can be generated from the badge database, allowing visitor history to be easily referenced or to quickly check pending sign-outs during emergency situations. Up to 100 records can be displayed in the application interface. To see additional records, export the search results.

4.4.1 Standard Reports

Administrators and attendants can run reports summarizing activity over a given week or day.

Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click **Administrator**. The **Badge Designs** screen appears.
2. Click **Reports** on the top navigation bar. The **Reports** screen appears.
3. At the top, select a report type (daily or weekly). If desired, select a badge design. Select the month, day and year to set the starting date. Click **Run Report**. The report is generated.



Note: The report may take several moments to generate, depending on system performance and the number of visitors in the database.

4. The report is displayed in Microsoft® Excel. If Microsoft® Excel is not found, the results will be displayed in the default Web browser.



Note: Ensure that the Internet Explorer Proxy Settings have been disabled before running/exporting a report.

4.4.2 Create a Customized Report

Administrators and attendants can create customized reports based on date ranges, visitor information and badge types.

Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click **Administrator**. The **Badge Designs** screen appears.
2. Click **Reports** on the top navigation bar. The **Reports** screen appears.
3. On the left, under **Search Digital Log**, fill in all desired fields for the database search. A visitor's first name, last name and unique identifier can all be searched or any substring of each. Specify the date range to search by using the drop- down list boxes. Optionally, select a badge design to include in the search. Click **Search**. The search runs.



Note: The results may take several moments to generate, depending on system performance and the number of visitors in the database.

4. Results are displayed on the right. If no results are found, on-screen text appears, **No matching records found**.

4.4.2.1 Visitor Details

Administrators and attendants can view all activity, modify



information for a specific visitor and export the visitor profile data from the customized report. From the Visitor Detail screen, an administrator or attendant can modify the badge record detail (such as first name, last name, etc.), deactivate or re-print badge, change the expiration date of the badge and force a scan in or out.

Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click **Administrator**. The **Badge Designs** screen appears.
2. Click **Reports** on the top navigation bar. The **Reports** screen appears.
3. In the **Search Digital Log**, run a customized report so that search results are displayed on the right.
4. Double-click on the name of the visitor to be viewed.
5. The **Search Detail** screen for that visitor appears.

Badge Record Detail

- This section displays all the information the visitor has been asked to provide as well as enable the administrator or attendant to do not permit, deactivate or re-print the badge.
- Do Not Permit – By checking this box, this visitor is prohibited from entering the facility and creating a badge. Once this feature is activated, it cannot be changed.
- Deactivate Badge – By checking this box, the badge previously created is deactivated. If the visitor does return, he/she will have to create a new badge. Once this feature is activated, it cannot be changed.
- Re-Print Badge – To reprint a badge with the same bar code as the original, click on button and a duplicate of original badge will be re-printed.

Changing Expiration Date

- If the badge design has an expiration date on it, the administrator or attendant can chose change the expiration date for this particular badge.

Badge Creation Detail

- This section displays information of when, where and by whom the original badge was created.

Visitor Activity

- This section allows an administrator or attendant to force a scan in or scan out of a badge without requiring the physical badge to be present.



Note: Use this feature to clean up and keep visitor data and emergency reports current.

4.4.3 Export a Report

After creating a report, Administrators can export the data in Microsoft® Excel format. If Microsoft® Excel is not installed, the data will be exported as HTML to the default Web browser.



Procedure

1. Create a report as described above.
2. When the report has generated, click **Export Data**. The data is loaded in Microsoft® Excel if available. Otherwise, it is displayed in the default Web browser.

4.4.4 Emergency Report

The Avery® Photo ID System enables quick emergency reporting to identify pending visitor sign-outs (have signed-in, but have not signed-out). Configure emergency reporting in **System Options**. To run an emergency report, do the following:

Procedure

1. Click **Emergency Button** at the bottom left of the screen. A **Confirmation** dialog box appears.
2. Click **Yes**. An emergency report of all pending visitor sign-outs will be generated immediately displayed on the screen and automatically distributed to the recipients as listed in **System Options**. This report may also be printed directly on blank ID badges.

ATTENDANT TASKS



5 Attendant Tasks

In the **Attendant** mode, the Avery® Photo ID System station is operated by a company employee responsible for greeting, signing-in and signing-out visitors. Additionally, the attendant can pre-enroll visitors manually or from an imported list, pre-print badges for expected visitors or issue previously printed badges to returning visitors.

In this section:

- 5.1 Create a Badge
- 5.2 Scan a Badge
- 5.3 Return Visitor Sign-In: New Badge Required
- 5.4 New Group Sign-In
- 5.5 Pre-Enroll Visitors
- 5.6 Sign-Out a Visitor or Group
- 5.7 Reporting

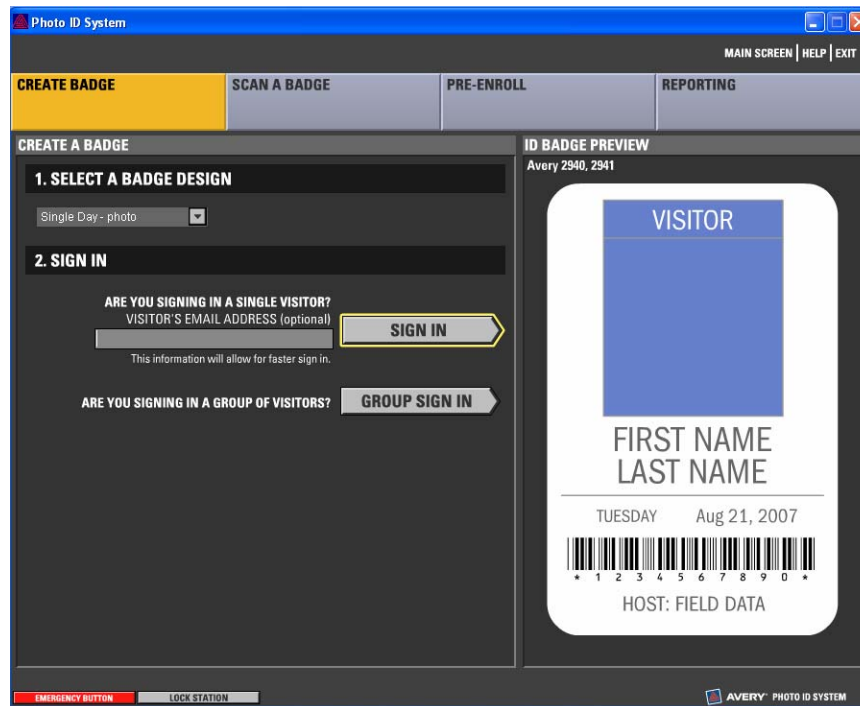


5.1 Create a Badge

Attendants can sign-in visitors using the default badge or an alternative badge design. An administrator sets the default badges for attendants.

Procedure

1. Log-in as an administrator or attendant. The **Station** mode screen appears. Click **Attendant**. The **Create a Badge** screen appears.



The Create a Badge screen in the Attendant mode.

2. The default badge layout appears on the right and is listed first in the drop-down list box. To change to another badge configuration, open the drop-down list box and click the desired configuration.
3. When a visitor approaches, a unique identifier (an E-mail address) may be requested or required. If required, enter the unique identifier. Click **Sign In** to begin. The **Visitor Information** screen appears.



Note: To change the unique identifier field to optional or required, refer to Chapter 4.2.2 in this guide. Administrator access is required. If no unique identifier is entered, quick check-in will not be available if the visitor returns.

4. The attendant can either manually type in the visitor's information or use the card reader (optional equipment) to populate the **Visitor Information** screen.
5. If using a card reader, ask the visitor for a Driver's License or Business card. If available, click **Read Card**. The **Scan Visitor's Information** popup appears. Scan the visitor's card by clicking **Scan** and inserting the card into



the scanner. Click **Done**. The visitor's information appears pre-populated on the **Visitor Information** screen.



Note: Card Reader is an optional piece of equipment purchased separately and is required to use this functionality.

6. If the visitor does not have a Driver's License or if the photo scanned is unacceptable, then click **Import Photo** to import a photo in JPEG format from an accessible file or click **Take Photo** to take the visitor's photo.



Note: Recommended size of the photo to be imported is JPEG 326x326 pixel image. Photos with minimum height and width up to JPEG 150 pixels can be imported successfully without much distortion.



Note: Distortion, if any, can be reduced if the shape of the imported photo matches the expected shape of the photo on the badge (square/rectangular).

7. When the attendant selects **Take Photo**, the **Photo** screen appears. Ask the visitor to step in front of the camera. Adjust the camera and the visitor's position until the face is centered in the photo area of the on-screen badge. Click **Take Photo** when ready.
8. Review the photo displayed in the badge. If it is unacceptable, click **Re-take Photo** to return to the previous step. Otherwise, click **Accept Photo**. The **Visitor Information** screen appears.
9. Enter the visitor's information that is missing. Each bold item is a required field and must be entered for the badge to print. Select the **Type**, if appropriate. Click **Print Badge** when you have finished. Printing begins and the badge is added to the database.
10. Remind the visitor to return the badge before leaving the premises. If no host is required, give the badge to the visitor. If a host is required, alert the host that the visitor has arrived. Give the host the visitor's badge.



Note: If a printing problem occurs, click **Re-Print Badge**.

11. Click **Done** to return to the **Create a Badge** screen.

5.2 Scan a Badge

Attendants can sign-in returning visitors who already have a printed badge. This may include contractors and multi-day visitors. To do so, the attendant must have the printed badge, with a barcode on it, in-hand.

Procedure

1. Log-in as an administrator or attendant. The **Station** mode screen appears. Click **Attendant**. The **Create a Badge** screen appears.
2. Retrieve the printed badge. Check the visitor's identification against the badge. If it matches, click **Scan A Badge** on the top navigation bar. The **Choose An Action** dialog box appears. Select **Scan In**. The **Scan A Visitor In** dialog box appears.



3. Either scan or manually enter the visitor's barcode number from the badge. Click **Submit** when finished. On-screen instructions will appear. If the badge does not register as a valid badge, follow your facility's security policy.
4. Click **Done** to return to the **Create a Badge** screen.

5.3 Return Visitor Sign-In: New Badge Required

Attendants can sign-in returning visitors who do not have a printed badge. This may include visitors who return only occasionally.

Procedure

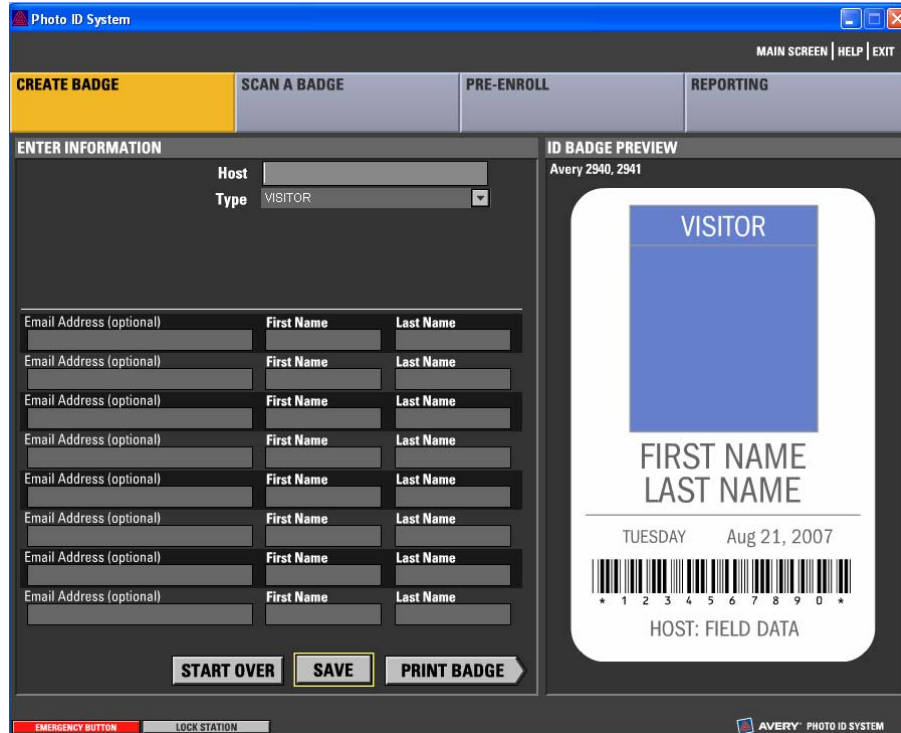
1. Log-in as an administrator or attendant. The **Station** mode screen appears. Click **Attendant**. The **Create a Badge** screen appears.
2. Enter the visitor's unique identifier (E-mail address) if requested. Click **Sign In**. If the unique identifier is recognized, the visitor's previous information loads. If not, refer to Chapter 5.1 in this guide.
3. Review the visitor's information and ensure that it is up-to-date. If necessary, revise the information and take a new a photo, following the steps outlined earlier. Click **Print Badge** when finished. Printing begins.
4. When printing has finished, follow the on-screen instructions set by the administrator.
5. Click **Done** to return to the **Create a Badge** screen.

5.4 New Group Sign-In

Attendants can sign-in groups of visitors, up to eight people at a time. Repeating information such as company name and host need only be entered once, speeding the check-in process.

Procedure

1. Log-in as an administrator or attendant. The **Station** mode screen appears. Click **Attendant**. The **Create a Badge** screen appears.
2. The default badge layout is displayed on the right and is listed in the drop-down list box. To change to another badge configuration, open the drop-down list box and click the desired configuration.
3. Click **Group Sign In**. Groups can only be processed by the system in groups of up to eight people. The **Group Sign In** screen appears.



The *Group Sign In* screen in the *Attendant* mode.

4. Enter the badge specific information at the top and then each group member’s information in the fields on the lower half of the screen. Fill all the required fields.
5. Click **Save**. A confirmation message appears since information once saved cannot be updated on this screen. Click **Yes** to save visitor information to the database. Click **No** to return to the **Group Sign-in** screen without saving.



Note: Records can be saved in batches by clicking **Save**. However, badges can be printed only once.

6. Click **Print Badge**. The badges print. If badges are not saved before printing, a warning message appears.



Note: Depending on the number of badges and printer speed, this process may take a few minutes.

7. Follow the on-screen instructions. Remind the visitor to return and sign-out before leaving the premises.
8. Click **Done** to return to the **Create a Badge** screen.

5.5 Pre-Enroll Visitors

Attendants can enter visitor information manually or from an imported list for expected visitor(s). Attendants can also pre-print badges for pre-enrolled visitors.



Note: If the default badge features a photo, the photo will be blank and will have to be manually added later.



Once visitor information is completed, you may either pre-print badges or save them to be printed later. The visitor is not signed-in until the badge is scanned-in (only if the badge design has a barcode, otherwise the visitor is signed-in automatically and the badge is active).

5.5.1 Manual Entry

Procedure for pre-enroll and pre-print:

1. Log-in as an administrator or attendant. The **Station** mode screen appears. Click **Attendant**. The **Create a Badge** screen appears.
2. The default badge layout appears on the right and is listed in the drop-down list box. To change to another badge configuration open the drop-down list box and click the desired badge design.
3. Click **Pre-Enroll** on the top navigation bar. The **Pre-Enroll** screen appears.
4. Enter the expected arrival date in the drop-down list boxes.
5. If the selected badge design has a visitor type field, then select the visitor type from the drop-down list box.
6. Click **Manual Entry**. The **Group Sign In** screen appears. Badges for an individual or group are pre-printed here.



Note: Pre-printing works the same for an individual or group. A single visitor is considered a group of one. Therefore, the steps below apply to both individuals and groups.

7. Fill in the fields at the top of the screen. Enter visitor information in the fields below. If there is a single visitor, enter information in the top set of fields only. Enter the visitor's unique identifier if requested.
8. Click **Save**. A confirmation message appears. Click **Yes** to save visitor information to the database. Click **No** to return to the entry screen without saving.



Note: Records can be saved in batches by clicking **Save**. However, badges can be printed only once.

9. Click **Print Badge** to print the badges. If badges are not saved before printing, a warning message is displayed.



Note: Depending on the number of badges and printer speed, this process may take a few minutes.

10. When the visitor arrives, click **Scan A Badge** on the top navigation bar. The **Choose An Action** dialog box appears. Select **Scan In**. The **Scan A Visitor In** dialog box appears.
11. Either scan or manually enter the visitor's barcode number. On-screen instructions appear.
12. Issue the badge to the visitor. Remind the visitor to return and sign-out before leaving the premises.
13. Click **Done** to return to the previously active screen.

**Procedure for pre-enrolling visitors:**

When the attendant only pre-enrolls a visitor, the visitor's badge is printed when the visitor arrives.

1. Follow steps 1–11 above. The unique identifier must be entered, so that the visitor information can be pulled out later.
2. When the visitor arrives, select the same badge design that was used for pre-enrolling, and enter the visitor's unique identifier to fetch details. Optionally, any other badge design can be used in which case all the missing information has to be entered/scanned and the photo clicked if required.
3. Issue the badge to the visitor. Remind the visitor to return the badge and sign-out before leaving the premises.
4. Modify visitor information if required.
5. Click **Print Badge**. The badge is printed and the visitor is signed in automatically.
6. Follow the on-screen instructions. Remind the visitor to return and sign-out before leaving the premises.
7. Click **Done** to return to the **Create a Badge** screen.

5.5.2 List Import

The attendant can create a file to be imported. The file should be in an Excel (.xls) format or be a comma-separated file (.csv). The file should contain the list of fields required for printing badges as per the selected design. Each column should have an appropriate header to match the badge data fields.

Procedure to pre-enroll and pre-print:

1. Log-in as an administrator or attendant. The **Station** mode screen appears. Click **Attendant**. The **Create a Badge** screen appears.
2. The default badge layout appears on the right and is listed in the drop-down list box. To change to another badge configuration, one without a photo and with a barcode is recommended, open the drop-down list box and click the desired badge design.
3. Click **Pre-Enroll** on the top navigation bar. The **Pre-Enroll** screen appears.
4. Enter the expected arrival date in the drop-down list boxes.
5. If the selected badge design has a visitor type field, then select the visitor type from the drop-down list box.
6. Click **List Import**. The **List Import Wizard Step 1** appears, and the list of fields to be imported is displayed. Select a file using the **Browse** button or enter the file path manually. Click **Next**.



Note: Only Excel(.xls) or comma-separated (.csv) files can be imported. The first row of the imported file should contain column headers.



Microsoft Excel - VisitorInformation.xls

File Edit View Insert Format Tools Data Window Help

Arial 10 B I U

	A	B	C	D	E	F	G
1	First Name	Last Name	Organization Nam	Location	Email Address		
2	Kevin	Oliver	Avery	Cleveland	kevin.oliver@yahoo.com		
3	Angela	Connors	Avery	Strongsville	angela.connors@rediffmail.com		
4	Thomas	Homa	Avery	Dreamsville	thomas.homa@avery.com		
5	Holly	Wilson	Avery	Granville	holly.wilson@usa.org		
6	Rich	Nelson	Avery	Painesville	rich.nelson@hotmail.com		
7	Mike	Shedlock	Avery	Canton	mike.shedlock@yahoo.com		
8	Shiela	Mathews	Avery	Dayton	shiela.mathews@yahoo.com		
9	Tom	Czemanski	Avery	Cleveland			
10	Tigist	kimberly	Avery	Cleveland			
11	Brian	Sholtis	Avery	Parma	brian12@yahoo.com		
12							
13							
14							
15							

Ready NUM

Sample input Excel sheet with Badge data to be imported

VisitorInformation.csv - Notepad

File Edit Format Help

```

First Name,Last Name,Organization Name,Location,Email Address
Kevin,oliver,Avery,Cleveland,kevin.oliver@yahoo.com
Angela,Connors,Avery,Strongsville,angela.connors@rediffmail.com
Thomas,Homa,Avery,Dreamsville,thomas.homa@avery.com
Holly,wilson,Avery,Granville,holly.wilson@usa.org
Rich,Nelson,Avery,Painesville,rich.nelson@hotmail.com
Mike,shedlock,Avery,Canton,mike.shedlock@yahoo.com
Shiela,Mathews,Avery,Dayton,shiela.mathews@yahoo.com
Tom,Czemanski,Avery,Cleveland,
Tigist,kimberly,Avery,Cleveland,
Brian,Sholtis,Avery,Parma,brian12@yahoo.com

```

Sample input CSV file with Badge data to be imported

- The **List Import Wizard Step 2** appears. The badge fields are mapped to the column headers in the imported file. If any badge field is not mapped, the column header defaults to **Please Assign a Field**. The attendant can modify the mapping by selecting a value from the drop-down list box. Click **Next** to proceed. Click **Previous** to return to **List Import Wizard Step 1**.




Note: All the required badge fields should be mapped to column headers from the imported list.

- If data is missing in any of the required fields in the imported list, then the **Missing Information** pop-up is displayed. Click **Correct and Re-import** to return to **List Import Wizard Step 1**, correct the errors in the data file and



re-import it. Click **Export Error List** to view the list of errors in Microsoft® Word. Click **Ignore and Continue** to ignore the rows with errors, import the valid data rows and proceed to **List Import Wizard Step 3**.

9. When attendant clicks **Next** on Step 2 and all the imported data is present and is valid, the **List Import Wizard Step 3** is displayed. The data mapping from the first valid row and corresponding badge fields is displayed. Click **Import List** to save all the records into the database and proceed to **List Import Wizard Step 4**. Click **Previous** to return to **List Import Wizard Step 2**.
10. The successfully imported data is displayed on **List Import Wizard Step 4**. The attendant can select badges to be printed by clicking on the desired row. Multiple rows can be selected by using the **CTRL** key. Check **Select all records on this page** to select all the badges displayed on a page. Click **Pre-Print** to print the selected badges. Use the **Next Page Arrow** buttons  to navigate through the pages. A message appears when badges are printed successfully.



Note: A maximum of 15 badges can be printed at a time.

Click  to view the next 15 badges imported.

11. Click **Done** to return to the **Pre-Enroll** Screen. If attendant clicks **Done** without printing badges, a warning message is displayed.
12. If attendant clicks **Cancel** on any of the Steps, the **Pre-Enroll** screen is displayed.

Procedure

For checking in a pre-enrolled visitor with a pre-printed badge:

1. When the visitor arrives, click **Scan A Badge** on the top navigation bar. The **Choose An Action** dialog box appears. Select **Scan In**. The **Scan A Visitor In** dialog box appears.
2. Either scan or manually enter the visitor's barcode number. On-screen instructions appear.
3. Issue the badge to the visitor. Remind the visitor to return and sign-out before leaving the premises.

Procedure

For checking in a printing a badge for pre-enrolled visitors:

1. Log-in as an administrator or attendant. The **Station mode** screen appears. Click **Attendant**. The **Create a Badge** screen appears.
2. Select the same badge design that was used for pre-enrollment and enter the unique identifier to retrieve visitor pre-enrolled information.
3. Modify visitor information if required.
4. Click **Print Badge**. The badge is printed and the visitor is signed in automatically. Issue the badge to the visitor. Remind the visitor to return the badge and sign-out before leaving premises.
5. Click **Done** and return to the **Create a Badge Screen**.



5.6 Sign-Out a Visitor or Group

The following process should be used both for individual visitors and groups of visitors. The visitor should not leave until all the steps are completed.

Procedure

1. Log-in as an administrator or attendant. The **Station** mode screen appears. Click **Attendant**. The **Create a Badge** screen appears.
2. Click **Scan A Badge** on the top navigation bar. The **Choose An Action** dialog box appears. Select **Scan Out**. The **Scan A Visitor Out** dialog box appears.
3. Either scan or manually enter the visitor's barcode number. Badges can be signed out one after another on this screen. A confirmation message will appear for each valid badge. Click **Submit** when finished. On-screen instructions appear.
4. Follow the on-screen instructions for handling the badge. Please follow your facility guidelines for badge retention.
5. Click **Done** to return to the **Create A Badge** screen. For a group of visitors, repeat these steps for each visitor.

5.7 Reporting

The Avery® Photo ID System allows administrators and attendants to generate reports and search for specific visitors within the system. The results can be exported. Emergency reports can be run, which generate a list of visitors who have checked in to the system, but who have not checked out.

5.7.1 Standard Reports

Administrators and attendants can run reports summarizing activity over a given week or day.

Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click **Administrator**. The **Badge Designs** screen appears.
2. Click **Reports** on the top navigation bar. The **Reports** screen appears.
3. At the top, select a report type (daily or weekly). If desired, select a badge design. Select the month, day and year to set the starting date. Click **Run Report**. The report is generated.



Note: The report may take several moments to generate, depending on system performance and the number of visitors in the database.

4. The report is displayed in Microsoft® Excel. If Microsoft® Excel is not found, the results will be displayed in the default Web browser.



Note: Ensure that the Internet Explorer Proxy Settings have been disabled before running/exporting a report.

5.7.2 Create a Customized Report

Administrators and attendants can create customized reports based



on date ranges, visitor information and badge types.

Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click **Administrator**. The **Badge Designs** screen appears.
2. Click **Reports** on the top navigation bar. The **Reports** screen appears.
3. On the left, under **Search Digital Log**, fill in all desired fields for the database search. A visitor's first name, last name and unique identifier can all be searched or any substring of each. Specify the date range to search by using the drop- down list boxes. Optionally, select a badge design to include in the search. Click **Search**. The search runs.



Note: The results may take several moments to generate, depending on system performance and the number of visitors in the database.

4. Results are displayed on the right. If no results are found, on-screen text appears, **No matching records found**.

5.7.2.1 Visitor Details

Administrators and attendants can view all activity, modify information for a specific visitor and export the visitor profile data from the customized report. From the Visitor Detail screen, an administrator or attendant can modify the badge record detail (such as first name, last name, etc.), deactivate or re-print badge, change the expiration date of the badge and force a scan in or out.

Procedure

1. Log-in as an administrator. The **Station** mode screen appears. Click **Administrator**. The **Badge Designs** screen appears.
2. Click **Reports** on the top navigation bar. The **Reports** screen appears.
3. In the **Search Digital Log**, run a customized report so that search results are displayed on the right.
4. Double-click on the name of the visitor to be viewed.
5. The **Search Detail** screen for that visitor appears.

Badge Record Detail

- This section displays all the information the visitor has been asked to provide as well as enable the administrator or attendant to do not permit, deactivate or re-print the badge.
- Do Not Permit – By checking this box, this visitor is prohibited from entering the facility and creating a badge. Once this feature is activated, it cannot be changed.
- Deactivate Badge – By checking this box, the badge previously created is deactivated. If the visitor does return, he/she will have to create a new badge. Once this feature is activated, it cannot be changed.
- Re-Print Badge – To reprint a badge with the same bar code as the original, click on button and a duplicate of original badge will be re-printed.



Changing Expiration Date

- If the badge design has an expiration date on it, the administrator or attendant can chose change the expiration date for this particular badge.

Badge Creation Detail

- This section displays information of when, where and by whom the original badge was created.

Visitor Activity

- This section allows an administrator or attendant to force a scan in or scan out of a badge without requiring the physical badge to be present.



Note: Use this feature to clean up and keep visitor data and emergency reports current.

5.7.3 Export a Report

After creating a report, Administrators can export the data in Microsoft® Excel format. If Microsoft® Excel is not installed, the data will be exported as HTML to the default Web browser.

Procedure

1. Create a report as described above.
2. When the report has generated, click **Export Data**. The data is loaded in Microsoft® Excel if available. Otherwise, it is displayed in the default Web browser.

5.7.4 Emergency Report

The Avery® Photo ID System enables quick emergency reporting to identify pending visitor sign-outs (have signed-in, but have not signed-out). Configure emergency reporting in **System Options**. To run an emergency report, do the following:

Procedure

1. Click **Emergency Button** at the bottom left of the screen. A **Confirmation** dialog box appears.
2. Click **Yes**. An emergency report of all pending visitor sign-outs will be generated immediately displayed on the screen and automatically distributed to the recipients as listed in **System Options**. This report may also be printed directly on blank ID badges.

VISITOR TASKS



6 Visitor Tasks

When the Avery® Photo ID System is in the **Visitor** mode, visitors can enter their own information and scan in or scan out on their own. The visitors will not be able to access any attendant or administrator functionality.



Note: For security, the application will attempt to disable Windows and certain function keys. To allow **Ctrl-Alt-Delete** to be disabled, the Windows user must have administrator access. Refer to Chapter 7 in this guide for more details.

In this section:

- 6.1 Sign-In Only
- 6.2 Scan Only
- 6.3 Full Visitor Mode

6.1 Sign-In Only Mode

Visitors can sign-in by themselves in the **Visitor** mode using the default badge design (set by administrator).

Procedure

1. Log-in as an administrator or attendant. The **Station** mode screen appears. Click **Visitor**. The **Choose a Visitor Mode** screen appears. Select **Sign-In Only** mode and the **Welcome** screen appears.



The **Welcome** screen in the **Visitor** mode.



- The visitor clicks **Click Here to Sign In**. If a unique identifier (E-mail address) is requested, the **Text Entry** screen appears. If a unique identifier is not requested, the **Photo** screen appears. Skip to step 4.



Note: To change the unique identifier field, refer to Chapter 4.2 in this guide. If no unique identifier is entered, quick check-in will not be available if the visitor returns.

- The visitor enters their unique identifying information as requested (this will also allow faster check-in in the future with the quick look-up feature). If the visitor is a returning visitor, they will enter the same unique identifier (E-mail address) entered previously. If no identifier was entered previously or if it changed, the visitor follows the new visitor sign-in process. The visitor clicks **Continue**. The **Photo** screen appears.
- The visitor steps in front of the camera and positions their face so it is centered in the photo area of the on-screen badge. The visitor clicks **Start Countdown** when ready. If the visitor is a returning visitor, the visitor information screen shows the retrieved information and photo. The visitor has the option to update their information, re-take the photo or print the badge. If the visitor decides to re-take the photo, follow instructions below. The **Badge Review** screen appears.



Note: The first time the camera is used, you may be asked to allow the application to access the camera. Click **Accept** or **Yes**. The camera will activate.

- If the photo is sharp and clear, the visitor clicks **Accept Photo** and the **Visitor Information** screen appears. If the photo is unacceptable, the visitor clicks **Re-take Photo**.
- The visitor enters their information. Each item with bold text is a required field and must be entered for the badge to print. The visitor clicks **Print Badge** when finished. Printing begins.
- The visitor follows the on-screen instructions to retrieve the badge and then reviews the instructions for returning the badge at the end of the visit.
- The visitor clicks **Done** to return to the **Welcome** screen. The system will revert to the **Welcome** screen after a few minutes.

6.2 Scan Only Mode

In the **Scan Only** mode, individual visitors with barcoded badges can scan themselves in and out without assistance from an attendant.

Procedure

- Log-in as an administrator or attendant. The **Station** mode screen appears. Click **Visitor**. The **Choose a Visitor Mode** screen appears. Select **Scan Only Mode** and the **Welcome** screen appears.
- The visitor clicks **Scan In** or **Scan Out**. The visitor then scans the barcode on their badge with the bar code scanner. They will see a confirmation screen if the badge is valid.
- The scan out process should follow the facility's security policy and accordingly may require additional steps.



6.3 Full Visitor Mode

Procedure

1. Log-in as administrator or attendant. The **Station** mode screen appears. Click **Visitor**. The **Choose a Visitor Mode** screen appears. Select **Full Visitor Mode**. The **Welcome** screen will appear. The visitor has the option to **Create a Badge** or **Scan In / Scan Out** an existing badge.
2. If the visitor is creating a badge, follow the procedure for **Sign-In Only** mode.
3. If the visitor needs to scan in or scan out, follow the procedure for **Scan Only Mode**.

TROUBLESHOOTING



7 Troubleshooting

The Avery® Photo ID System is engineered to run smoothly right out of the box. However, should a problem occur, common solutions and suggestions are available in this section.

In this section:

- 7.1 System Set-up and General Issues

7.1 System Set-Up and General Issues

Badges do not print correctly.

Ensure that the correct printer and media settings are used.

- Ensure that the printer is installed correctly (Refer to Chapter 2.2.1 in this guide and the **Hardware Installation Map**). Confirm that the manufacturer's printer driver(s) are correctly installed and up-to-date.
- Ensure that the printer options are properly set in the Windows **Control Panel** (Refer to Chapter 2.3.1 in this guide).
- Confirm that the paper product loaded in the printer is the type required by the badge design (Refer to Chapter 4.1.1 step 2 in this guide).
- Confirm that the paper product is a recommended Avery® product (Refer to Chapter 8.1 in this guide).
- Reset the printer by turning the power off, waiting for 30 seconds and turning it on.
- Check to ensure that there is sufficient ink or toner in the printer.

In text fields, the cursor disappears.

This occurs on computers with limited RAM. The following solutions should resolve the problem:

- Close down all other applications.
- Reboot the system.
- Disable video acceleration settings (In **Control Panel > Display > Settings > Advanced > Troubleshooting**).
- Add more RAM to the system.

In Windows XP, the application does not function correctly as a client.

Ensure that the Windows XP firewall is disabled through the Control Panel.

- Go to **Control Panel > Network Connections**.
- Right-click a network connection and select **Properties**.
- Click the **Advanced** tab.
- Uncheck the box in **Internet Connection Firewall**.
- Click **OK**.



- Repeat for each network connection.
Should you require the firewall, you will instead need to add a custom port with access through the firewall for Application Server. Use the port you selected during the installation process (default is 8080). Refer to Windows Help for more information.
In the Visitor mode, Ctrl-Alt-Delete is not disabled.
By default, the Windows user must be an administrator to allow **Ctrl-Alt-Delete** to be disabled. IT support is highly recommended for this process. Editing the registry is an advanced topic.
Alternatively:
 1. An administrator first must grant temporary administrator access to the user under which the station will be running.
 2. Log-in as this user.
 3. In regedit (Windows XP), go to: **HKEY_CURRENT_USER \ Software \ Microsoft \ Windows \ CurrentVersion \ Policies**
 4. Select **Security > Permissions**.
 5. Add the user and grant **Full Control**.
 6. Remove administrator access from the user.

ADDITIONAL RESOURCES



8 Additional Resources

Paper product information and additional support is listed in this section. For customer and Web support, a valid Software License Number (found inside the software CD jewel case) is required. Visit **PhotoID.avery.com** and click on **Support Center** for an installation tutorial, FAQs and more!

In this section:

- 8.1 Recommended Avery® Products
- 8.2 Registration
- 8.3 Consumer Support
- 8.4 Technical Support
- 8.5 Expanded Support

8.1 Recommended Avery® Products

The following Avery® products are recommended for use with the Avery® Photo ID System. The manufacturer number, product name and description are listed.

2940: Avery® Self-Adhesive Photo ID Badge Labels

Visitor badge size, ink-jet, white, 2.25" x 3.5" label on 4" x 6" sheet, 100 badges per pack

2941: Avery® Self-Adhesive Photo ID Badge Labels

Visitor badge size, ink-jet, white, 2.25" x 3.5" label on 4" x 6" sheet, 500 badges per pack

2942: Avery® Clean Edge Photo ID Badge Inserts

Two sided printing, business card size, ink-jet, white, 2.25" x 3.5" 2-sided badge on 4" x 6" sheet, 100 badges per pack

2943: Avery® Clean Edge Photo ID Badge Inserts

Two sided printing, business card size, ink-jet, white, 2.25" x 3.5" 2-sided badge on 4" x 6" sheet, 500 badges per pack

2944: Avery® Clean Edge Photo ID Badge Inserts

Convention size, ink-jet, white, 3" x 4" badge on 4" x 6" sheet, 100 badges per pack

2945: Avery® Clean Edge Photo ID Badge Inserts

Convention size, ink-jet, white, 3" x 4" badge on 4" x 6" sheet, 500 badges per pack

2946: Avery® Laminated Photo ID Badges

Business card size, self-adhesive clip, ink-jet, white, 2.25" x 3.5" laminated badge on 4" x 6" sheet, 25 badges and clips per pack

2920: Avery® Badge Holder Clip Style

Portrait style, business card size, clear, sized for 2.25" x 3.5" badge, 50 per pack

2921: Avery® Badge Holder Clip Style

Landscape style, business card size, clear, sized for 2.25" x 3.5" badge, 50 per pack

2922: Avery® Badge Holder Neck Hanging Style



Convention size, clear, sized for 3" x 4" badge, 100 per pack

2923: Avery® Badge Holder Clip Style

Convention size, clear, sized for 3" x 4" badge, 100 per pack

2947: Avery® Badge Holder Clip Style

Landscape style, business card size, clear, sized for 2.25" x 3.5" label on 4" x 6" sheet, 500 per pack

2948: Avery® Badge Holder Clip Style

Portrait style, business card size, clear, sized for 2.25" x 3.5" label on 4" x 6" sheet, 500 per pack

2949: Avery® Badge Holder Clip Style

Two sided printing convention size, clear, sized for 2.94" x 3.87" 2-sided badge on 4" x 6" sheet, 500 per pack

2950: Avery® Badge Holder Neck Hanging Style

Two sided printing convention size, convenient pre-punched holes, sized for 2.94" x 3.87" 2-sided badge on 4" x 6" sheet, 500 per pack

2951: Avery® Laminated Photo ID Badges

Business card size, ink-jet, white, 2.25" x 3.5", laminated badge on 4" x 6" sheet, 100 badges per pack

8.2 Registration

Only registered users of the Avery® Photo ID Software will receive full technical support, assistance and other information. You may register in any of the following ways:

- Mail or fax the registration card enclosed with your software CD.
- Register on-line at: **www.photoID.avery.com**
- Call 1-800-73-AVERY (1-800-732-8379)

8.3 Consumer Support

photoID.avery.com has answers to some common questions and problems or you may contact Avery® Consumer Service Center for product-related information.

United States and Canada

Phone: 1-800-73-AVERY (1-800-732-8379)

Fax: 1-800-831-2496

8.4 Software Support

Registered users of the Avery® Photo ID Software will receive telephone or electronic support in the following areas:

- Installation assistance: installing the Avery® Photo ID System for the first time on your first computer.
- Upgrade assistance: upgrading your Avery® Photo ID System to the latest version.
- Documented product defects or assistance identifying software issues for all currently support versions of the Avery® Photo ID System.

If you have a question, be sure to check the User Guide and our on-line help resources before calling Avery® Software Support.

Software Support for the United States and Canada:

Phone: 1-888-835-8379



If you call Avery® Software Support, please be at your computer with the Avery® Photo ID Software running. Be prepared to provide the following information:

- Your site License Number from inside your original software CD jewel case or organization name & address to identify your site.
- To find the version of the Avery® Photo ID System that you are using, check the lower left of the **Station** mode screen immediately after logging in as an administrator or attendant. Alternatively, check the release notes on the CD for version information.
- Details about your computer: type of computer, operating system, network, printer and printer driver and amount of memory.
- The EXACT wording of any messages that appeared on your screen.
- What you were doing when the problem occurred.
- Whether or not you could recreate the problem.
- How you tried to solve the problem.



Note: Warranties for your barcode scanner, Web camera, card reader, computer and printer are provided by the hardware manufacturer. Please refer to your hardware manual or other documentation for details on the warranties of these products.

ADVANCED TOPICS



9 Advanced Topics

In this section:

- 9.1 Database Considerations
- 9.2 Secure the Avery® Photo ID System


9.1 Database Considerations

9.1.1 Introduction

The Avery® Photo ID System features archive, back-up and restore functionality. Avery® recommends a regular data back-up schedule to protect against data corruption, hardware failures or other emergencies. IT support may be needed.

9.1.2 Archive Old Badges

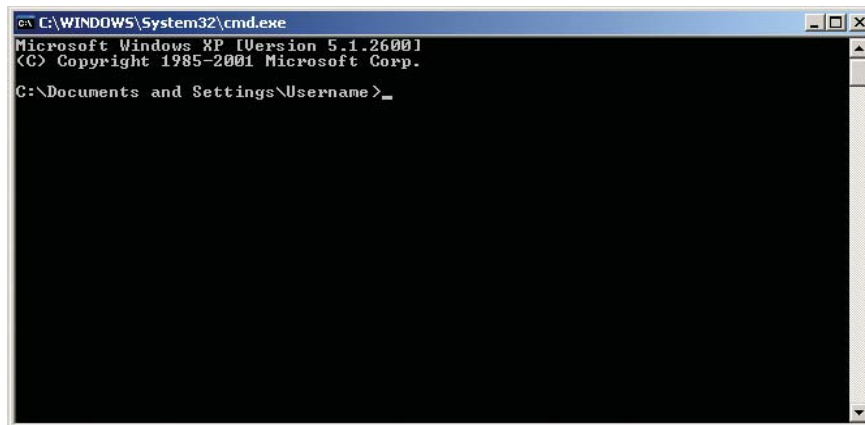
Archiving removes all old, used badge data (not badge designs) from the system. Archiving is only necessary when the system storage space becomes an issue.

 **Note:** An archived badge is both backed up and removed from the system. Only the badge data is archived; badge designs are not.

 **Note:** Once a badge is archived, the data is not accessible or available to restore.

Procedure


1. Exit the Avery® Photo ID System. Go to the **Start Menu** and click **Run**. In the dialog box, type **cmd** (or **command** on some systems) and click **OK**. A system command line appears.



The system command line.

2. Using the **cd** command, change directories to the directory where the Avery® Photo ID System is installed. This will usually be **C:\Program Files\Photo ID System**. To access that directory, for example, type **cd Program Files\Photo ID System**. Refer to Windows Help for more information.



3. Enter the bin directory by typing **cd bin**.
4. In that directory, the **archive_badges.bat** file allows archiving of the badges. To archive badges, do the following:
 -  **Note:** To specify a date, use the year-month-day format: yyyy-mm-dd.
 - To archive all badges that expired on or before 01/15/2003, type: **archive_badges 2003-01-15** You will be prompted to continue. Type **Y**. The script runs.
 - To archive all badges that expired on or before 01/15/2003, as well as non-expiring badges that were issued on or before 01/15/2003, type: **archive_badges /include-non-expiring 2003-01-15**
5. When completed, the selected badges and related access records are archived. The script creates a new subdirectory within the **\archive** directory. This new subdirectory records the date and time the archive was performed, using the format **month-day-year_hours.minutes.seconds**. For example, a back-up run at 8:35 AM on January 15, 2003 creates the directory:
C:\Program Files\Photo ID System\archive\01-15-2003_8.35.00
Within that directory are three files (**access.txt**, **access_errors.txt**, **badge.txt**) that can be opened in Microsoft® Excel for evaluation.

9.1.3 Database Back-Up

The Avery® Photo ID System database should be periodically backed up to protect against data corruption, hardware failures or other emergencies. This ensures that important data can be accessed and recovered. The Avery® Photo ID System provides a simple script to back-up the current database in a flat database file and all data files associated with the application.

Procedure

1. Select the **Administrator** mode. The **Customize a Badge Design** screen appears. Click on the **Maintenance** tab in the navigation bar at the top of the screen. Click **Backup** to make a backup database of current data.
2. When completed, the selected badges and related access records are archived. The script creates a new subdirectory within the **\archive** directory. This new subdirectory records the date and time the archive was performed, using the format **month-day-year_hours.minutes.seconds**. For example, a back-up run at 8:35 AM on January 15, 2003 creates the directory:
C:\Program Files\Photo ID System\archive\01-15-2003_8.35.00
3. To restore data from backup database list, refer to 9.1.5.

9.1.4 Schedule Automated Database Back-Up

Use the Windows Scheduler to automatically execute back-up scripts on a daily, weekly or monthly basis.



Procedure

1. Exit the Avery® Photo ID System. Go to the **Start Menu** and select **Programs > Accessories > System Tools**. Click **Scheduled Tasks**. The **Scheduler** appears.
2. Double-click **Add Scheduled Tasks**. The **Scheduled Task Wizard** appears. Follow the on-screen instructions.
3. When asked to select a program, click **Browse**. In the following dialog box, navigate to the Avery® Photo ID System directory and select **backup_photoid.bat**. Click **Next**. The next step appears.



Note: The default install directory for the back-up script is **C:\Program Files\Photo ID System\bin**

4. Enter the preferred task name and select a frequency of event occurrence: daily, weekly or monthly. Click **Next**. The next step appears.
5. Enter the details regarding the exact time and, if applicable, day of the event. Click **Next**. The next step appears.
6. Enter a valid **username** and **password** to execute the events. Click **Next**. The next step appears.
7. Click **Finish**. The new scheduled task appears in the scheduler list.
8. Right-click the new task and click **Properties**. The **Advanced Options** dialog box appears.
9. In the **Run** field, add **/q** at the end of the command line if running the back-up script. This will prevent the script from awaiting user input. Click **OK**. The dialog box closes.
10. Close the **Scheduled Tasks** window. The task will now run automatically.



9.1.5 Database Restoration

The Avery® Photo ID System database is easy to restore in the event of an emergency.

Procedure

1. Select the **Administrator** mode. The **Customize a Badge Design** screen appears. Click on the **Maintenance** tab in the navigation bar at the top of the screen. Select a database from the backup database list and click on **Restore**.



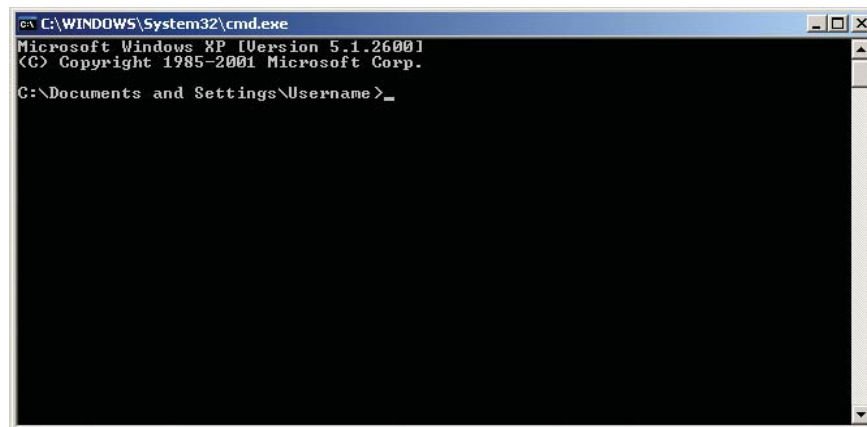
Note: Before restoring a database, be sure to backup the current database that you are working in.

9.2 Secure the Avery® Photo ID System

The Avery® Photo ID System server ships with a pre-configured Database Server. The root password is **photoadmin** and should be changed as soon as possible. The application has a separate username pre-configured - **madison** - with the default password **photoapp**. This password should also be changed immediately.

Procedure

1. Stop the AveryPhotoID-Tomcat service in the **Services Control Panel**.
2. Go to the **Start Menu** and click **Run**. In the dialog box, type **cmd** (or **command** on some systems) and click **OK**. A system command line appears.



The system command line

3. Using the **cd** command, change directories to the directory where the Avery® Photo ID System is installed. (This will usually be **C:\Program Files\Photo ID System**) Then enter database directory: **\mysql\bin**
4. Run **mysql -u root -p mysql** and enter **photoadmin** when prompted for the password. You will receive a **mysql>** command prompt.
5. Change the root password by typing (replace **new password** with desired value):

```
SET PASSWORD FOR root@localhost=PASSWORD('new password');  
SET PASSWORD FOR root@"%"=PASSWORD('new password');
```



6. Change the application password by typing (replace 'new password' with desired value):

```
SET PASSWORD FOR madison@localhost=PASSWORD('new password');
```

```
FLUSH PRIVILEGES;
```

7. Type `\q` to exit the `mysql>` prompt. Close the command line window.
8. You must finally change the password in the Application Server configuration file, as this must match the new database password you configured:
9. Using a text editor, edit the file `madison-server.xml` located in the subdirectory `\tomcat\conf` of your installation folder. Search for the word `photoapp` - it will appear similar to this:

```
<parameter>  
<name>password</name>  
<value>photoapp</value>  
</parameter>
```

10. The maintenance scripts (**backup_photoid.bat**, **restore_photoid.bat** and **archive_photoid.bat**) also need to be updated with the new passwords. They are, by default, located in `C:\Program Files\Photo ID System\bin`. Open each file with a text editor and replace each occurrence of the original root password (**photoadmin**) with the new version. Carefully edit the value (**photoapp**) to match your new password, **Save** and **Exit**.
11. Restart the **AveryPhotoID-Tomcat** service.

GLOSSARY



Glossary

Badge

A badge refers to a single, printed instance of a badge design. It features all the formatting and branding of a badge design, plus distinct visitor information such as name, company, photo and more. It is the physical piece of material issued to a visitor and the data associated with that visitor.

Badge Design

A badge design is a fully customized badge template, but lacking any specific visitor information. It does support formatting, organization branding and other features. It can be created, modified and deleted. When combined with visitor information and printed, the result is a badge.

Badge Template

A badge template is essentially a badge stencil, with no customization. A badge template contains basic layout such as paper orientation, but lacks any formatting or customization. It cannot be created, edited or modified. It can only be used as the foundation for a badge design.

Default

The factory settings included with the application. The settings included enable the application to be used immediately after installation.

Hexadecimal

A counting system that uses 16 as a base rather than 10. Hexadecimal is often used to specify a color by indicating how much red, green and blue is present in that color, using two digits for each color. Pure blue, for example, is #0000FF. <http://www.visibone.com/color> provides a very good reference for colors and their hex codes.

Decimal Value	Hexadecimal Value
0	0
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	A
11	B
12	C
13	D
14	E
15	F

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