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Simply ID™

Identification software for tommorow's technology!

Simple Tips Installation Guide




Serial #: _____

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Installing the Simply ID™ Software

Introduction:

Congratulations on the purchase of your new Simply ID™ software package. You have purchased the most powerful identification software available on the market today. This guide helps you with the initial setup and installation of Simply ID. Please keep this guide handy for future reference. If you need further help with the software, Simply ID has provided online help at www.simplyid.com or you can click the  button within the Simply ID software at any time.

Simply ID, software for tomorrow's technology. Let's Begin!

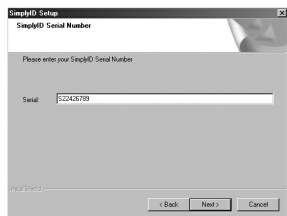
Installation Instructions:

1. Place the Simply ID CD disk into your CD drive. You should now see a window that looks like the following screen:



If you do not see this window, re-insert the CD and wait until the light on the CD drive goes off. If you still do not see this screen, double click on the setup application file located on the CD. Once you see this screen then click **Next**.

2. You will now be asked to accept all terms of the license agreement. You must accept all terms of the license agreement or your installation will terminate.
3. A readme text file may appear explaining future enhancements, updates or modifications. Click **Next** to continue with the installation.
4. Enter your user name and company information then click **Next**.
5. Enter the **Serial Number** located on the front or back cover of this Simple Tips Installation Guide. The serial number may also be located on the software box. The serial number is case sensitive. For Example: If your serial number is S22426789, be sure the 'S' is capitalized. Click **Next**.



6. Choose the **Typical** setup for preferences and then click **Next**.
7. Choose the default Simply ID program folder then click **Next**.
8. Choose **Next** to start copying Simply ID component files into your system.
9. Click **Finish** to complete the installation process.
10. To **Begin** Simply ID, click on the Simply ID icon on your desktop or go to start/programs/simplyid/simplyid.

(Note: If you ever need to remove or repair the Simply ID software, place the CD back into the CD ROM drive and follow instructions.)

Additional Hardware Components Installation:

You may have purchased additional hardware components like a digital camera, PVC printer or other hardware device. We recommend loading those hardware components at this time. Make sure you load all software drivers for that particular hardware. Simply ID may not support some hardware items. Please check hardware compatibility conflicts at www.simplyid.com or contact your Simply ID partner.

Hardware recommended systems include our factory tested Simply ID Laminate System, Simply ID Lite Plastic Card System and the Simply ID Plastic Card System. Consult with your Simply ID partner or visit www.simplyid.com.

Registering Simply ID:

Your Simply ID Partner and the Simply ID Team will support the software 30 days* from the date of purchase.

*Requires registration

We strongly recommend registering your Simply ID software. You may register online at www.simplyid.com or email the following information to: register@simplyid.com.

Serial #: _____
Date of Purchase: _____
Partner you purchased the software from: _____
Company Name: _____
Contact: _____
Address: _____
City: _____ State: _____ Zip: _____
Email Address: _____

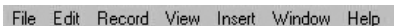
Setting Up the Simply ID Software

Toolbar and Menu Overview:



Toolbar (Left to Right)

- New Card- Allows you to design a new card
- Open Card- Opens existing card designs (.bag files)
- Save Card- Save the card that is currently opened
- Cut- Cut an object on the card to paste it elsewhere on the card design
- Copy- Copy an object on the card to paste it elsewhere on the card design
- Paste- Paste an object you have cut or copied onto the card design
- Print- Print a card design
- First Record- First database record in the database
- Previous Record- Previous database record in the database
- Next Record- Next database record in the database
- Last Record- Last database record in the database
- Help Topics- Click on this for help with any item in the software
- Insert Text- Insert static text onto the card design. Once placed on the card, right click to add text and change font
- Insert Image- Insert an image onto the card design. Right click to import image. Adjust box size by left click and drag
- Card Designer- Click this button to work on or view a card design
- Picture Viewer- Click this button to store pictures or images with a particular data record
- Tracking Module- Click this button for tracking (requires additional purchase)
- Add Record- Add a database record to the database



Menu (Left to Right)

File- Contains card, print and database backup options

Edit- Contains cut, copy and paste features for the card designer

Record- Contains record filter, deleting and other data functions for the database


View- Reduce or increase the viewing of the card design (make sure you have clicked the card design to enable)

Insert- Insert objects onto the card design

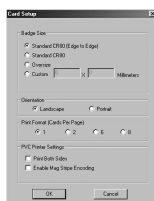
Window- You can choose which function you want to view: Card Designer, Picture Viewer or Tracking

Help- Contains help topics and help regarding Simply ID

Setting Up the Card Designer:

1. We recommend adding a database record to the system before setting up a new card design. To do this click the **Add Record** button  and enter your first name, last name, address and other fields at the data entry screen located on the left side of the Simply ID program.

2. Next click the **New Card** button  or File/New Card



Badge Size

3. Choose the badge size that you will be designing. We recommend the CR80 (Edge to Edge) for PVC card printers like the Eltron and Fargo Series. If you are using inkjet or laser printers, we recommend setting the badge size to Standard CR 80 or select custom for smaller or larger card sizes.

Orientation

4. Choose your orientation. This feature allows you to print cards vertically or horizontally, based on your personal preference. (PVC card printers require you to customize your orientation preferences within the printer, as well)

Print Format (Card Per Page)

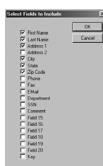
5. If you are using a PVC card printer such as the Eltron or Fargo series, choose 1 card per page. If you are using 2up, 6up, or 8up inkjet or teslin card paper with your inkjet or laser printer, select the appropriate cards per page.

PVC Printer Settings

6. Print both sides and Mag Encoding will only work with specific PVC Card Printers like Eltron or Fargo PVC printer series. Please contact your Simply ID partner for more information on these types of 2 sided and encoding printers.

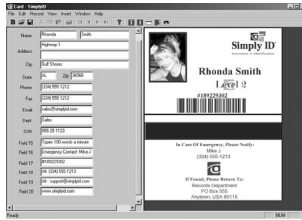
Select Fields to Include

7. This option allows you to place the specific fields onto the card design. Check which fields you would like on the card and click **OK**.



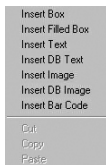
(If you do not see data for these fields, then the data on the left does not have text for that field or you will need to refresh the database by clicking the next or previous record arrow's ).

8. Your card design should now show up on the right side of the screen. To increase or decrease the card size visually on the screen, click on the card, then go to View/Zoom out or in.



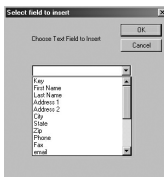
Designing a Card:

1. **Modifying**, inserting or adjusting the card design and objects is as easy as right clicking the card or object. We call it the “Simple Right Click Design” so remember this. If you need to insert items you can right click the card in an area that does not have an object or go to Insert and choose the object you would like to add. If you need to modify an object on the card, right click that object and make your changes. To adjust the size of an item just click the edges of the box, left click & drag to your desired size.
2. **Objects** you can place on the card design by right clicking the card include: Insert box, insert filled box, insert text, insert database (DB) text, insert image, insert database (DB) image, and insert barcode.



If you **right click** any object you placed on the card design, the properties of that object will appear. You can modify color schemes and adjust font sizes. You also can enter textual information, import images and other unique features depending on the object you have chosen.

Insert Database (DB) Text



If you want to map data fields from the database records to the card design, choose the Insert DB Text function. Next choose which field you want to place on the card design. You can adjust the color and font properties by right clicking the object. (If you do not see data for this insert db text, then the data on the left does not have text for that field or you will need to refresh the database by clicking the next or previous record arrow's).

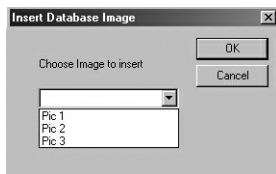
Bar Code Setup



You can add a variety of barcodes to one card design by choosing **Insert Bar Code**. Database fields, text or the combination of both can be used in certain barcodes. Many barcodes have structure requirements, so if you get a barcode error, find out what type of format the barcode you are using will handle.

It is important to note, the barcode **Value** represents the format within the barcode itself. The barcode **Text** represents any text or numbers displayed outside the barcode and **has no value within the barcode**.

Insert Database (DB) Image



If you want to map the picture or image you have saved in the picture viewer for a particular record, use the **Insert DB Image** feature. Next, choose which image you want to use. (We recommend if you are using only one picture to store images in the picture viewer, use Pic1 and select Pic 1 for this function). You can adjust the size of the image on the card by clicking one of the edges of the box, then left click and drag to your desired size.

3. **Save** the card design by clicking on '**File/Save Card As**'. When prompted, select a name for the card you want to save. Remember what directory you saved the card in! We recommend saving the card designs in the default (Simply ID) directory.
4. **Opening** an existing card, click on File/Open Card and locate the card file (.bag) file extension.

Using the Database:

Click on the left side of the screen, where the data entry screen is located to begin entering or viewing data.


Adding Records

Click the **Add Record** button  to begin adding additional records.

Adding Record Images to Each Record

(See Using the Picture Viewer)


Viewing Records

Once you are done adding records you can view records by scrolling through the arrow tool bar  or by clicking Record/First or Next or Last or Previous.

Deleting Records

Click on Record/Delete Record

Refreshing Records

If you see old data for a record like the picture or field data on the card design, click on the arrow  to refresh the record.


Filtering Data Records

Click on **Record/Record Filter**. This powerful feature allows you to filter certain records by a specific field. For example, if you designate Social Security Numbers (SSN) as a field, this filter enables you to scan individual card files by SSN, providing you a report of all SSN's within the database. Once available, you could "Batch" print (See Printing Cards) these records to a printer or for data scrolling purposes. This filter also allows you to eliminate scrolling through individual records and concentrate on fewer, according to the filter you have designated. To reset the filter go to Record/Reset Record Filter. **You can only use Record Filter for Record ID, First Name, Last Name or Field 15.**

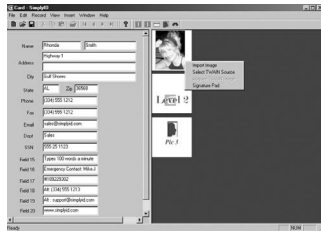
Using the Picture Viewer:

The Picture Viewer allows you to use Twain compliant digital cameras, scanners or other scanning devices. Image import is also available by importing BMP, JPG, GIF or other image formats. You can store up to 3 image fields per record. Signature capture is also available in the picture viewer. (Activation of the Simply ID Signature Module. requires additional purchase) Contact your salesperson or visit www.simplyid.com for more information.

(Note: Simply ID recommends small images for storage if you are going to maintain a database over 500 records)

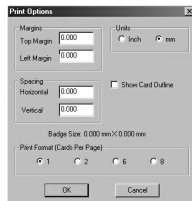
To activate the picture viewer for a particular record click on the **Picture Viewer** button  or go to Window/Picture Viewer. Next right click Pic 1, Pic 2, or Pic 3. Select the Twain source (if you are using a Twain compatible digital device) or choose **Import Image** if you will be importing an image from within your computer.

(Note: If you used Pic1 for the image field on the card design, then always use Pic 1 for the picture storage in the Picture Viewer).




Printing an ID Card

Card Design Layouts:

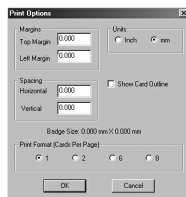


If you are using a PVC Card Printer or are only printing one card at a time then you will not need to worry about the margins and spacing. Just choose 1 card per page print format.

If you are using an Inkjet or Laser printer and have purchased 2up, 6up or 8 up layouts, adjust the **Print Options** accordingly. To adjust the print layout settings, make sure you are viewing the card design.  Then go to File/Print Options. Simply ID recommends you make a photocopy of your 2up, 6up, or 8 up paper then align the margins and spacing by printing samples on inexpensive copy paper.

Once you have achieved the proper settings, **save your settings** in the print options box. It is imperative that you save your settings immediately. Otherwise, you will be forced to begin the process from scratch. We recommend saving your card design at this time, as well. Use this manual as an additional reference for your settings:

Cards Per Page: _____
 Margins: _____
 Top Margin: _____
 Left Margin: _____
 Spacing: _____
 Horizontal: _____
 Vertical: _____




Click **Show Card Outline** to help you properly align your print settings. (Remember to deactivate this feature before you print because the print results will match your display. In other words, your cards will be outlined!)

The **Print Preview** feature allows you to view your printing results prior to printing.


Printing Cards:

Make sure the printer you will be using with Simply ID is the default printer. If you designed a Landscape card make sure the printer is set to Landscape in Start/Programs/Printers then right click the printer for its properties.

PVC Card Printers

Printing your cards can be done 2 ways. If you are using a PVC card printer, such as an Eltron or Fargo PVC printer, we recommend clicking on the **Print** button  or by going to File/ Print. Remember you can preview your card before printing; go to File/Print Preview.

Inkjet or Laser Printers (1up Layout)

Printing your cards can be done 2 ways. If you are using an Inkjet or Laser printer and printing a single card, (1up layout or 1 card per page), we recommend clicking on the **Print** button  or by going to File/ Print. Remember you can preview your card before printing; go to File/Print Preview.

Inkjet or Laser Printers Batch Printing (2 up, 6up or 8up)

The easiest way to **Batch Print** cards (multiple record printing) is to enter all of the records that you would like to print. Next go to the first record by clicking the data entry side, then click Record/First Record. Click Print Preview.

(If you have an 8up layout, it will print the first 8 records. Go to the 9th record and repeat the printing process.)

Another way to batch print cards is to **Filter** the records. We recommend designating a field for "batch" printing. You can learn more about the **Filter** feature by reviewing **Using the Database** section.

Maintaining Your Simply ID Software and Hardware

Backing Up or Restoring Your Database:

Database Backup

We recommend you periodically backup your database; File/Backup Database. To restore the database, go to File/Restore Database. This will restore (open) the last backup. The default backup database file is stored accordingly: C:/SimplyID Folder. We recommend burning this backup.mdb file onto CD or other storage media for added protection.

Database Repair

Advanced users may wish to compact and/or repair their database by going to:

Start/Settings/Control Panel/Administrative Tools/Data Sources (ODBC).

Click on **System DSN** tab, highlight **SimplyID**, click configure, click **repair**.

Card Design Backup

Backing up cards is as easy as saving any files in the Simply ID folder or hard drive with the file extensions .bag or by the name of the card.

(If you go to File/New Database this will delete your existing database.)

DO NOT ATTEMPT THIS UNLESS YOU HAVE BACKED UP YOUR DATA OR INTEND TO WIPE OUT THE DATABASE!

Cleaning and Maintaining Your Printer:

Cleaning and maintaining your PVC card printer or Inkjet printer is something that should be done every 500 cards. If you purchased a PVC card printer, please follow the manufacturer's suggestions. This will help reduce wear & tear, while prolonging your printer's function ability and longevity.

Purchasing Additional Modules

Signature Module:

*Requires additional purchase.

The **Simply ID Signature Module*** includes a USB signature pad, signature software module and pen.

(Simply ID Software is required to activate Simply ID Signature Module)

Tracking Module:

*Requires additional purchase.

The **Simply ID Tracking Module*** Features:

- Document Time In & Time Out Per Individual Record
 - Automated Data Collection, Via Driver's License or Other
 - Barcode / Magstripe Combo Reader
- (Simply ID Software is required to activate Simply ID Tracking Module)

Simply ID Support Services

Contacting Your Simply ID Partner for Support:

Simply ID is sold through a variety of partners and distributors throughout the United States. Please contact the vendor you purchased the product from with any support issues. If the vendor cannot resolve your support inquiry, please visit our web page at www.simplyid.com or email us at: support@simplyid.com.

Simply ID Support Information:

If you experience any database errors or unusual program functionality, we recommend restarting Simply ID and/or rebooting your computer before you contact your salesperson.

*A list of Frequently Asked Questions and Support tips are located at www.simplyid.com 24/7.

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*Specifications can change without notice and some components mentioned may not be fully supported.

*Please contact www.simplyid.com for updated support and product announcements.

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www.simplyid.com