# System Galaxy Quick Guide CONFIGURATION AND OPERATION



# CEX – Card Exchange v7 Networked INTEGRATED BADGE DESIGN & PRINTING

Includes Badge Template-Sharing on Network
Also see the CEX-7 Addendum

MAR 2022 | SG 11.8

# System Galaxy Version 11.x

# Integration with Card Exchange 7

User Mini-Guide

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#### 2nd edition

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# **Introduction to Badging with Card Exchange 7**

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

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

# **Overall Requirements for Card Exchange:**

### **NEW INSTALL REQUIREMENTS:**

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

#### **UPGRADING PRE-EXISTING VERSIONS OF CARD EXCHANGE:**

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

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

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

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

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

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# **Installing and Configuring the Badging components**

STEP	ACTION		
1	INSTALL SYSTEM GALAXY SOFTWARE		
	You must correctly install all parts of the System Galaxy software (1, 2, and 3).		
	◆ Part 1 – install prerequisite components ~ required		
	<ul> <li>Part 2 – install MS SQL Components ~ required. If you are installing a workstation that is part of a distributed solution (i.e. separate database server), you will install only the MS SQL Native Client components.</li> </ul>		
	<ul> <li>Part 3 – Installing the System Galaxy software for a client workstation that supports badging. Two possibilities are available:</li> </ul>		
	<ul> <li>a) Option A – is a complete install: this includes System Galaxy software and badging components along with core services. You will only choose this if you are installing a Communication Server.</li> <li>b) Option B – is a client only workstation install: this installs System Galaxy software and badging components.</li> </ul>		
	7 00 1		
2	INSTALL THE BADGE PRINTER DRIVER		
	<ul> <li>Install the printer driver according to manufacturer's instructions and perform a test print using the desired print settings.</li> </ul>		
3	INSTALL CARD EXCHANGE INSIDE SOFTWARE AND TEMPLATES		
	<ul> <li>Go to C: Program Files\System Galaxy\CEX and run the "install" file to begin the installation.</li> </ul>		
	◆ The Card Exchange install will run as follows:		
	a) the CEX software installs in the System Galaxy/CEX folder		
	b) All the templates and data folder are installed in the System Galaxy Badging at the root of the C-drive. Note: if you are running VISTA® you must store your System Galaxy photos directory to the new badging folder just created C: DRIVE.		
	☐ Data  File Edit View Favorites Iools Help  ☐ Back ▼ ○ ▼ ⑤ ✓ ⑤ Folders		
	Address  Folders  X GardExchange CSV Demo  Photos Templates CardExchange CSV Demo Templates CardExchange Excel Demo.xls CardExchange Excel Dem		

# **Registering System Galaxy for Badging**

You must perform the Registration according to purchase order.

#### SYSTEM REGISTRATION:

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

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

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

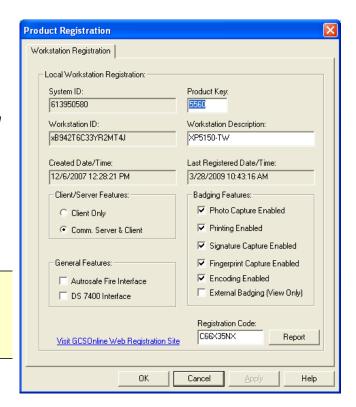
Refer to Chapter 5 of the SG 8.3 Software User manual for detailed information about System Registration.

#### **WORKSTATION REGISTRATION:**

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

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

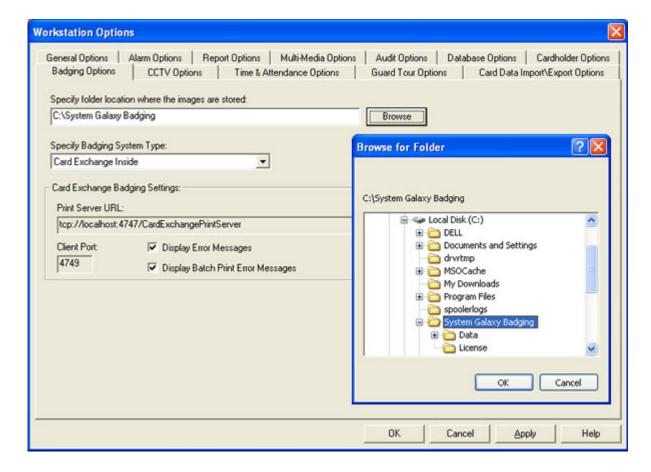
Refer to Chapter 5 of the SG 8.3 User manual for detailed information about Workstation Registration.



# **Setting Workstation 'Badging' Options**

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

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



# **Operating the Card Exchange Badging/Print Server**

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

# Starting the Card Exchange Print Server

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

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

Start® > Programs > System Galaxy > System Galaxy

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

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

```
CardExchange Print Server - XPD5150-TW:4747

Initializing...
Automated printing started...
Print server runs without dispatcher.
Waiting for new print job...
```

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

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



# **Stopping the Card Exchange Print Server**

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



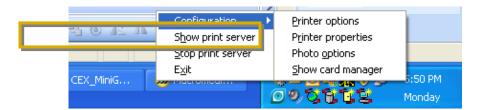
▶ Choose **'Stop print server' option** from the context menu.

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

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

# **Showing the Card Exchange Print Server**

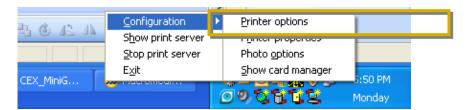
▶ Right-click on the server icon to get to the Card Exchange menu



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

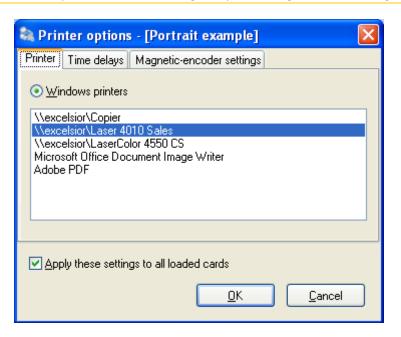
# **Setting up the Badge Printer**

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



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

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



Click OK to save settings.

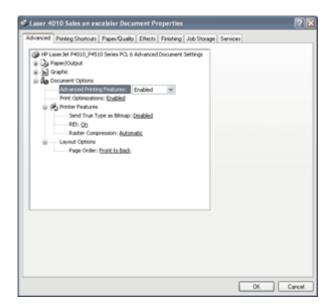
**IMPORTANT:** The badge printer driver must already be installed.

# **Setting the Badge Printer Properties**

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



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

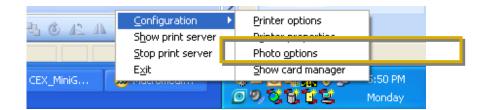


Click **OK** to save settings.

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

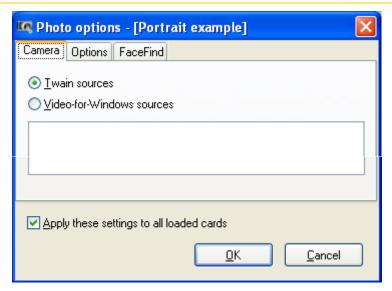
# **Setting up the Photo Capture driver**

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



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

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



▶ Click **OK** to save settings.

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

# **Creating Badges with Card Exchange Manager**

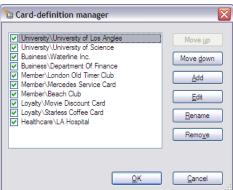
Card Exchange Manager is the badge designer. Some initial setup is required.

# STEP-1 Starting the Card Definition Manager

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



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



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

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

# STEP-2 Adding a Badge Design via Card Definition Wizard

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

#### CREATE A BADGE DESIGN NAME

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



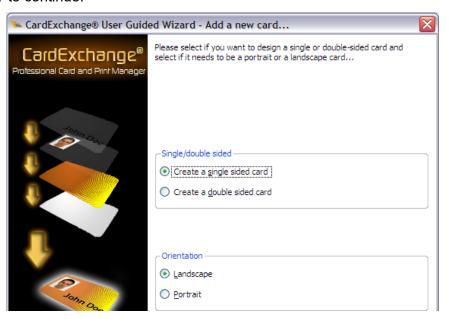
#### CHOOSE TO CREATE THE BADGE VIA THE WIZARD

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



#### SET UP THE BADGE TYPE & LAYOUT

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



#### CHOOSE THE DATABASE CONNECTION (MANDATORY)

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



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

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

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

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

Click NEXT to continue.



#### ADD DESIRED DATA FIELDS TO THE BADGE

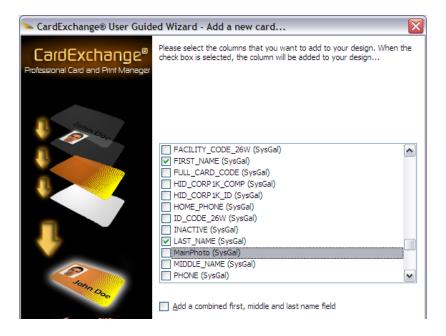
• "check" the combine first/last name (shortcut) if you wish to always have these fields on the badge.

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

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

IMPORTANT: DO NOT check the MainPhoto from this list.

Click NEXT to continue.



# ADD A PHOTO / SIGNATURE TO THE BADGE (OPTIONAL)

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

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

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

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

▶ Click **NEXT** to continue.



# ADD A BACKGROUND IMAGE TO THE BADGE (OPTIONAL)

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



# ADD A LOGO TO THE BADGE (OPTIONAL)

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



# ADD A BARCODE TO THE BADGE (OPTIONAL)

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



#### **AUTO-START THE DESIGN EDITOR AFTER WIZARD COMPLETES**

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



#### ADJUST LAYOUT OF FIELDS ON THE BADGE

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

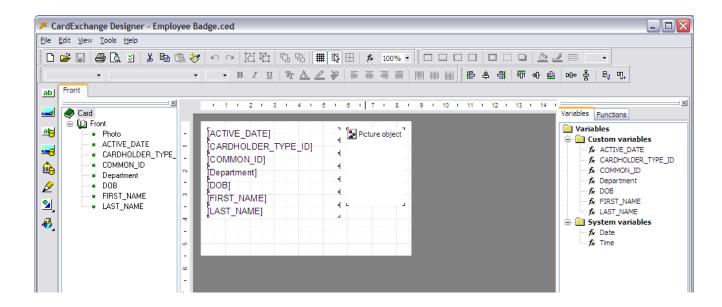
▶ Use your mouse pointer to grab the fields and move them around, arranging them on the layout as desired.

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

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



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



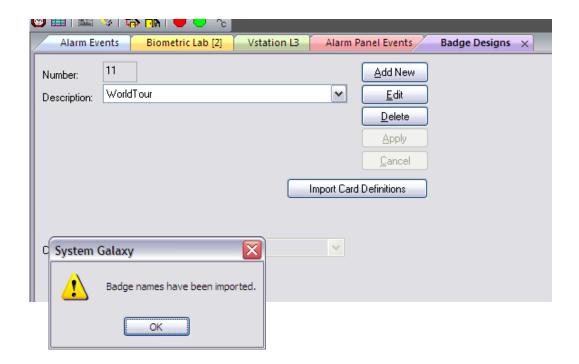
# STEP-3 Importing the New Badge Design into Galaxy

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

#### IMPORT THE BADGE DESIGN INTO GALAXY

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

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



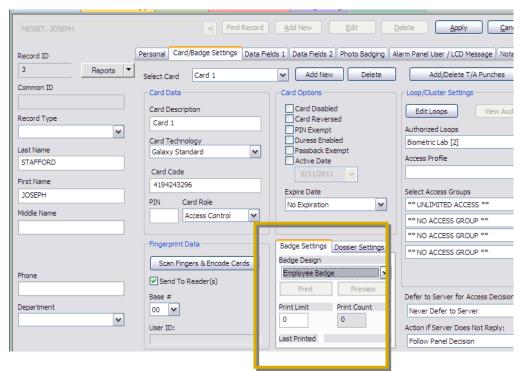
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# STEP-4 Assigning a Badge Design to a Cardholder

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

#### ASSIGNING THE BADGE DESIGN TO THE GALAXY CARDHOLDER

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



# **Editing Badges with Card Exchange Manager**

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

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

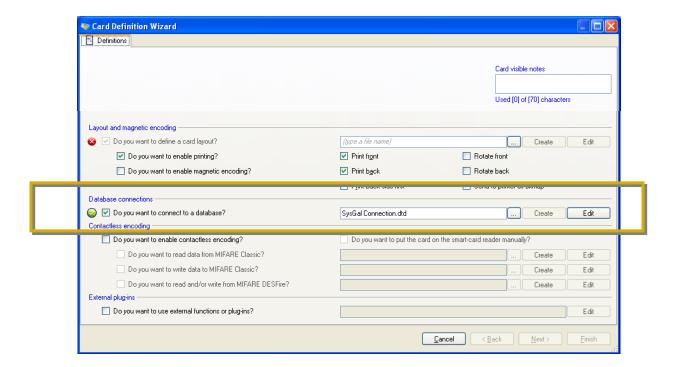


- ▶ Choose 'Configuration > Show card manager' from the context menu.
- ▶ The *Card-Definition Manager* window will open allowing you to set up your badge design templates.
- Click EDIT for the badge you wish to edit.



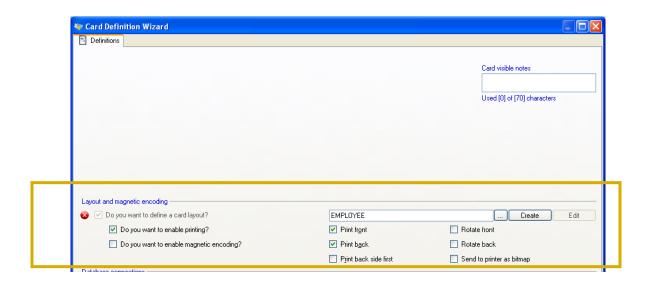
#### SETTING THE DATABASE CONNECTION FILE

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



### **OPENING THE BADGE LAYOUT SCREEN (DESIGNER)**

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



#### **USING THE BADGE LAYOUT SCREEN (DESIGNER)**

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

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

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

5

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

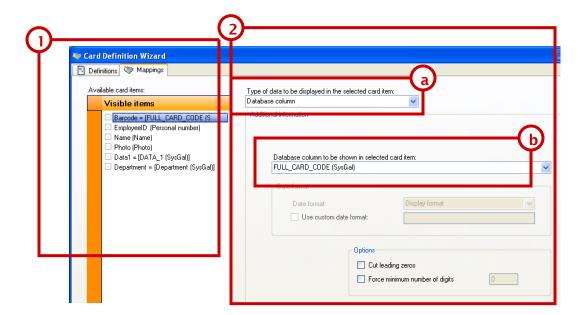
WARNING: if you close without saving your changes you will loose your intended settings. The CEX close confirmation message asks you if you want to CANCEL your changes when you close. If you click YES you will dump your changes. See the ExchangeIT Designer Help screens for details on how to create variables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

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### **USING THE MAPPING SCREEN (DESIGNER)**

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

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

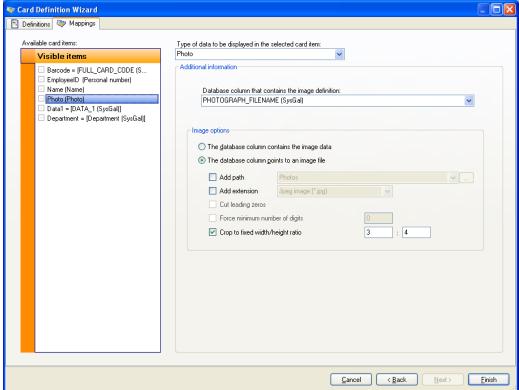


WARNING: if you close without saving your changes you will loose your intended settings. The CEX close confirmation message asks you if you want to CANCEL your changes when you close. If you click YES you will dump your changes. See the <a href="ExchangelT Designer Help screens">ExchangelT Designer Help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

### **EDITING THE PHOTO VARIABLE MAPPING (DESIGNER)**

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

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



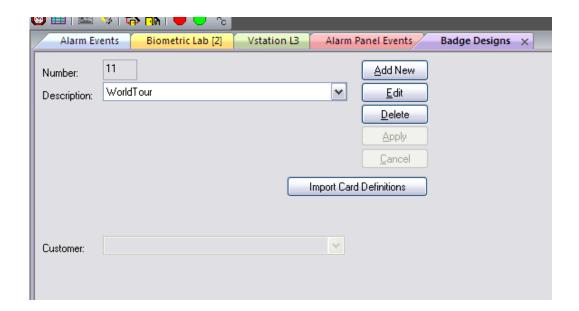
WARNING: if you close without saving your changes you will loose your intended settings. The CEX close confirmation message asks you if you want to CANCEL your changes when you close. If you click YES you will dump your changes. See the ExchangeIT Designer Help screens for details on how to create variables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

#### USING THE BADGE DESIGN IN SYSTEM GALAXY

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

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

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



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