



# **ID** Creator

# Installation Guide

Sjones Limited

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### Introduction

This guide will outline the systems requirements, and the necessary steps required to setup and configure Terian ID Creator.

Terian ID Creator is a Windows based database application that allows a user to harness the power of Adobe Indesign or Seagull Scientific Bartender to produce professional quality ID Cards.



## System Requirements

Terian ID Creator is designed to run with the following software...

#### Operating Systems

Microsoft Windows 10

Microsoft Windows 11

#### Databases

Microsoft SQL Server 2016

Microsoft SQL Server 2017

Microsoft SQL Server 2019

Microsoft SQL Server 2022

Terian ID Creator supports both a remote database server for single or multiple client setups, or a locally installed database server (as in the case of the Express versions of Microsoft SQL Server).

#### Card Printing Applications (CPA)

Adobe Indesign CC 2019 (v14.0.2) -> CC 2023 (v18.1.0)

Seagull Scientific Bartender 11.1

A CPA is not required to be installed to setup and configure Terian ID Creator, however a CPA will be required to create and print ID card forms.

#### Capture Device API

#### Microsoft DirectShow

A capture device is required by the internal image capture functionality of Terian ID Creator, if images are to be captured by other software then no capture device is required on the client workstation.



# Terian ID Creator Installation

Only 4 steps are required to successfully setup and configure Terian ID Creator, depending on your requirements some of these steps may not be required.

Before performing the installation steps, ensure your system will utilise software from the supported software list.

Steps required to setup and configure Terian ID Creator:

- 1. Install SQL Database Server
- 2. Install Terian ID Creator Application
- 3. Install Terian ID Creator Database Schema
- 4. Configure Terian ID Creator



#### Step 1 – Install SQL Database Server

Due to additional processing requirements, a remote database server is the recommended configuration.

Installation of a remote SQL database server is beyond the scope of this guide, however if an existing remote SQL database server is to be used, you may need your database server administrator to assist with installing the Terian ID Creator database schema as part of step 4.

If a local SQL database server is to be used the following SQL Server Express versions are supported...

SQL Server 2016 Service Pack 2 Express

http://www.microsoft.com/en-nz/download/details.aspx?id=56840

SQL Server 2017 Express

https://www.microsoft.com/en-us/download/details.aspx?id=55994

SQL Server 2019 Express

https://www.microsoft.com/en-us/sql-server/sql-server-downloads

SQL Server 2022 Express

https://www.microsoft.com/en-us/sql-server/sql-server-downloads

Note: SQL Server Management Studio (SSMS) is utilised in this installation documentation and can be downloaded separately from Microsoft.

https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-managementstudio-ssms

Installation of the Terian ID Creator database component is possible without using SSMS however that process is not covered in this guide.

The figures demonstrated in this guide depict SQL Server 2022 Express Edition, you will need to consult Microsoft's Installation documentation for other versions of SQL Server for details on how to install those editions.



#### **Basic Installation**

The SQL Server Express installer will provide multiple installation options, Select the 'Basic' option to continue.



Figure 1 SQL Server 2022 Express Edition Installation Wizard

Selecting the 'Basic' option will install the necessary components for use in Terian ID Creator.



#### Installation Location

A custom installation location may be selected when installing SQL Server 2022 Express Edition, however for this documentation we stick to the defaults.

sql Server 2022 Express Edition			© – ×
Specify SQL Server install location INSTALL LOCATION *: C:\Program Files\Microsoft SQL Server	Browse	MINIMUM <b>6604 MB</b> DOWNLO <i>4</i>	FREE SPACE
		278 MB	
	Close	< Previous	Install
			16.2211.5693.3

Figure 2 SQL Server 2022 Express Edition Installation Location

#### Installation Process

The installation will download the necessary components before proceeding with the installation process.

sql Server 2022 Express Edition		☺ _ ×
Download successful!		
Installing		
Extracting setup files		
SQL Server 2022 is also available for Linux		
To obtain the SQL Server 2022 Linux images, including Containers, please see here (https://g	go.microsoft.com/fwlink/p/?l	inkid=2197262).
	Pause	Cancel
		16.2211.5693.3

Figure 3 SQL Server 2022 Express Edition Installation Process



#### Installation Completion

Upon successful installation, you will be presented with the summary screen.

SQL Server 2022 EXPRESS EC	lition	sfullv!		© – ×
			tobara markerTructed Ca	
SQL ADMINISTRATORS	SQL SERV		tabase=master; irusted_cc	
FEATURES INSTALLED	C:\Prog		erver\160\Setup Bootstrap	5\Log\2023022
SQLENGINE VERSION	C:\SQL2	2022\Express_ENU		
16.0.1000.6, RTM	C:\Prog	ram Files\Microsoft SQL So	erver\160\SSEI\Resources	
A CON	iputer restart is req	uirea to complete yc	bur installation.	
	·ⓒ- Connect Now	Customize	Install SSMS	Close
				16.2211.5693.3

Figure 4 SQL Server 2022 Express Edition Installation Completion

# Step 2 - Install Terian ID Creator Application

The Terian ID Creator Application installer can be downloaded from <u>https://terian.co.nz</u>

User Account Control Do you want to allow t unknown publisher to device?	× his app from an make changes to your
TerianIDC_Setup_v1.95.ex Publisher: Unknown File origin: Hard drive on this con Show more details	e mputer
Yes	No

Figure 5 Terian ID Creator Installer



#### Microsoft ODBC Driver 13.1 for SQL Server

🔙 Terian ID Creator - InstallAware Wizard		_		$\times$
Application Requirements				
The following and increases much be accessed				
The following requirements must be process	ed before starting setup	).		
Microsoft ODBC Driver 13.1 for SQL Se	erver (x64)			
To continue, dick Next,				
to contract cherthexer				
InstallAware	< Back Nex	(t >	Cano	:el

Figure 6 Terian ID Creator Installer

The default data access framework used by Terian ID Creator is Microsoft ODBC Driver 13.1 for SQL Server which is installed as part of the installation process if it is not already present on the target system.

SQL Server 2012 Native Client is also supported by Terian ID Creator; however, it is not installed by the Terian ID Creator installer, but may be downloaded and installed separately.

#### SQL Server 2012 Native Client

SQL Server 2012 Native Client can be downloaded from the Microsoft SQL 2012 Feature Pack download page.

SQL Server 2012 Feature Pack

http://www.microsoft.com/en-nz/download/details.aspx?id=29065

The SQL Server 2012 Native Client download links can be found part way down the page.





Figure 7 Terian ID Creator Installer



#### Default Installation Folders

The default installation folders are as follows...

Application folder

%PROGRAMFILES%\Sjones Limited\Terian\Terian\_IDC

🔙 Terian ID Creator - InstallAware Wizard		_		×
Destination Folder Select folder where setup will install files.			-	5
Install Terian ID Creator to: C:\Program Files (x86)\Sjones Limited\Teria	n\TerianIDC	Chan	ge	
Destination Folder Required Disk Space: Remaining Disk Space:		17,5 55,67	21 KB 70 MB	
InstallAware	< Back	Next >	Can	cel

Figure 8 Terian ID Creator Installer – Application Folder



Data files folder

#### '%MYDOCUMENTS%\Sjones Limited\Terian\Terian\_IDC

🔚 Terian ID Creator - InstallAware Wizard		_		×
Data Folder Select folder where setup will install files.				5
Install Data to: C:\Users\Public\Documents\Sjones Limited	\Terian\TerianIDC\	Data Chan	ge	
Destination Folder Required Disk Space: Remaining Disk Space:		17,5 55,67	21 KB 70 MB	
InstallAware	< Pade	Nexts	Car	
		wext >	Can	

Figure 9 Terian ID Creator Installer – Data Folder

Note: The application folder can be changed during installation; however, the data files folder should only be customised from within Terian ID Creator.



#### Step 3 - Install Terian ID Creator Database Schema

Installation of the Terian ID Creator database schema will create the necessary database files and objects used by the Terian ID Creator application on the database server.

Using Microsoft SQL Server Management Studio (SSMS) to install the database schema is demonstrated below, you may need your database server administrator to assist with this step.

#### Connect to SQL Database Server

Connect to the SQL Server instance you would like to configure Terian ID Creator to utilise.

교 <sup>를</sup> Connect to Server		×
	SQL Server	
Server type:	Database Engine	~
Server name:	DEVWIN7_DEP_64\SQLEXPRESS	~
Authentication:	Windows Authentication	~
User name:	DEVWIN7_DEP_64\User	$\sim$
Password:		
	Remember password	
	Connect Cancel Help	Options >>

Figure 10 Connecting to SQL Database Server

The server name should include the instance name of the SQL Server instance to be used as the database server.



#### Open Terian ID Creator Database Schema

Open the Terian ID Creator database schema in SSMS.

FileName: 'Terian IDC v1.95 – Database Objects – New Installation.SQL'

Folder: '%PROGRAMFILES%\Sjones Limited\Terian\Terian\_IDC\Docs\Database SQL Scripts'



Figure 11 Terian ID Creator database schema loaded in SSMS

You may need to edit the folder path contained in both 'FileName' attributes of the 'Create Database' statement.

This folder path represents where the Terian ID Creator database files will be stored by your database server.



#### Execute Terian ID Creator Database Schema SQL Script

Once any path modifications are made (if required) click the 'Execute' button to run the script.

The Messages window should display output like the following...

2 <sup>2</sup> Messages
(1 row affected)
<pre>(1 row affected) The module 'sphddcrafbat' depends on the missing object 'dbo.sphddSystemsLog'. The module will still be created; however, it cannot run successfully until the object exists. The module 'sphddcrafbat' depends on the missing object 'dbo.sphddSystemsLog'. The module will still be created; however, it cannot run successfully until the object exists. The module 'sphddcrafbat' depends on the missing object 'dbo.sphddSystemsLog'. The module will still be created; however, it cannot run successfully until the object exists. The module 'sphddcrafbat' depends on the missing object 'dbo.sphddSystemsLog'. The module will still be created; however, it cannot run successfully until the object exists. The module 'sphddsrafbat' depends on the missing object 'dbo.sphdSystemsLogtor. The module will still be created; however, it cannot run successfully until the object exists. The module 'sphdSystemsLogt' depends on the missing object 'dbo.sphdSystemsLogtor. The module will still be created; however, it cannot run successfully until the object exists. The module 'sphdSystemsLogt' object'sbo.sphdSystemsLogtor. The module will still be created; however, it cannot run successfully until the object exists. The module 'sphdSystemsLogtor's depends on the missing object 'dbo.sphdSystemsLogtor. The module will still be created; however, it cannot run successfully until the object exists. The module 'sphdSystemsLogtor's depends on the missing object 'sbo.sphdSystemsLogtor's depends on the missing object 'sbo.sphdSystemsLogtor's dows.phone's dependence of the module will still be created; however, it cannot run successfully until the object exists. The module 'sphdSystemsLogtor's dows.phone's dependence of the missing object's dows.phone's dependence of the module will still be created; however, it cannot run successfully until the object exists. The module 'sphdSystemsLogtor's dows.phone's dependence of the module will still be created; however, it cannot run successfully until the object exists.</pre>
Completion time: 2020-05-14702:42:48.2487367+12:00

Figure 12 Terian ID Creator Database Schema Execution Messages



#### Check for Terian ID Creator Database Objects

Expanding the 'Databases' tree should display the 'Terian' Database objects including all the tables, stored procedures and other objects required by Terian ID Creator...

😑 🐻 DEV_SJ_WIN10_3\SQLEXPRESS (SQL Server 16.0.10	00 - DEV_SJ_WIN10_3\User)
🖃 📕 Databases	
🕀 💼 System Databases	
🕀 🛑 Database Snapshots	
🖃 🗑 Terian	
🕀 🛑 Database Diagrams	
🖃 💼 Tables	
🕀 🛑 System Tables	
🕀 💼 FileTables	
🕀 🛑 External Tables	
🕀 🛑 Graph Tables	
🕀 🏢 dbo.tblCardData	
🕀 🏢 dbo.tblCardDataLookup	
dbo.tblConfigCaptureSettings	
⊞	5
⊞ dbo.tblConfigClientCardTypeDynam	micList
dbo.tblConfigClientCardTypeFields	
⊞ dbo.tblConfigClientCardTypeNotes	;
dbo.tblConfigClientCard lypes	
⊞ dbo.tblConfigClients	
⊞ dbo.tblConfigClientTypes	
⊞ dbo.tblConfigCPAFormFrames	
⊞ dbo.tblConfigCPAForms	
⊞ dbo.tblConfigGiobalFields	
	Jes
⊞ dbo.tblConfigOperators	
I dbotbleonigkeports	
dootblContacts	
dbo.tbll ostCards	
	ina
⊞ dbo.tblUIDLog	2
🕀 📕 External Resources	
🕀 📕 Synonyms	
🕀 📕 Programmability	
🕀 📕 Service Broker	
🕀 📕 Storage	
🕀 📕 Security	
🗉 💼 Security	
🕀 🛑 Server Objects	
🕀 📒 Replication	
🕀 🛑 Management	

Figure 13 Terian ID Creator Database Objects

At this stage if all the scripts successfully completed, the Terian Database is ready to be used by the Terian ID Creator Application.



#### Step 4 - Configure Terian ID Creator

# 

v1.95.32.971

Figure 14 Terian ID Creator Application

Sjones Limited



#### Database Connection Configuration

Terian ID C	reator	
Database	NONE ~	
User Name		T
Password		
	Trial Days <b>30</b>	
	Login Close	

Click the 'Create Database Configuration' button to open the database configuration form.

Enter the appropriate information into the Database Configuration form and click 'Save'.

Database Conf	iguration		Don't forget to save! ★
Name	TERIAN		
Access Layer	Native Client	ODBC	
Server Name	.\SQLEXPRESS		
Database	Terian		
Authentication	Windows	Oatabase	
	Test		
			->
		Save	Close

Figure 16 Terian ID Creator Database Configuration form

Note: The Server Name should include the instance name if one was configured as part the database server installation.

Figure 15 Terian ID Creator Logon form



#### Logon to Terian ID Creator

With the newly created Database Configuration selected enter the default username and password of 'IDS'

Terian ID Creator					
Database	TERIAN ~				
User Name	IDS				
Password	###				
	Trial Days <b>30</b>				
	Login Close				

Figure 17 Terian ID Creator - Logon form

#### Workstation Configuration

Until workstation specific configuration details are saved, Terian ID Creator will warn the user that no configuration details have been found, this can be fixed by selecting the 'Workstations' configuration button in the Configuration Menu.

!!! Alert !!!		
Time	21/Feb/2023 23:33:16	
Problem	Failed to Load Workstation Details.	^
		×
Reason	Workstation Name not found : "DEV_SJ_WIN10_3"	^
	Close	<ul> <li>Image: A state of the state of</li></ul>

Figure 18 Terian ID Creator - Workstation Not Found Alert



The Workstation name needs to be set to the name of the workstation as assigned by Windows, you can use the get name button to automatically fill this value in.

Workstation Configuration					New Record 🜟				
		Name :							
Name		General Mag Encoder	Mifare Encoder	SMTP Engine	SMTP Config	CPA Config	LoadData Status	Sector Encoding	
		Report Printer :							~
			Start Sentinel		End Sentinel				
		Magstripe 1 :				Overric	le CardType Configu	uration	
		Magstripe 2 :							
		Magstripe 3 :							
		Client Folder :							
		Debug Logging :							
4	4								Close

Figure 19 Terian ID Creator - Workstation Configuration form

Once all the appropriate information on the Workstation Configuration form is entered click 'Save'.

At this point if the Card Printing Application (CPA) is selected, then Terian ID Creator will attempt to connect to it and start it up, so saving the Workstation Configuration may appear to take additional time before returning input control.



#### Sample Report Configuration

The default filename path for the sample reports are shipped with a temporary variable name, and this needs to be updated to include the full file path.

Open Report Configuration from the Configuration Menu and update the 'FileName' value for each sample report to ensure it correctly points to the full path name of the sample report file.

Report Configuration		Don't forget to savel ★
Name	Name	Sample - A - Z - No Photos
Sample - A - Z - No Photos Sample - A - Z - With Photos		Sumple Alphabetical Report Norricos Grouped by Sumanic Initial.
Sample - A - Z - With Photos And Barcode Sample - CardData - Datelssued - NoPhotos	FileName Report Source Card Type Name Date Range	bisPUBLIC%\Documents\Sjones Limited\Terian\TerianIDC\Data\Reports\Sample - Alç       ->         Terian.dbo.spGetReportView       >         Image: Comparison of the system of the sys
		Report Designer

Figure 20 Terian ID Creator - Report Configuration form

The 'Select File' button (Button with 3 dots) should allow you to quickly and easily select the report file and return the full path name. Once the path has been updated, click 'Save' to record the changes.

#### Capture Settings

By default Capture Settings are not set automatically after installation. The Capture Settings will need to be set to avoid the following alert when logging into Terian ID Creator.

Time	21/Feb/2023 23:34:26	
Problem	Failed to Load Capture Settings.	
		~
Reason	Capture Settings for Workstation not found : "DEV_SJ_WIN10_3"	
	Close	

Figure 21 Terian ID Creator - Capture Settings Not Found Alert



To save Capture settings select the 'Capture' button from the Additional Features/Options menu, then select 'Configuration' from the 'Options' menu.

Capt	ure Frame			
Сар	oture Size: Capture Dev	vice Not Active		
0	ptions		Save But Do Not Print	Cancel
	Configuration •	Capture		:
	Display •	Camera Control		
	Cancel	Image Adjustment		

Figure 22 Terian ID Creator - Capture Frame form

Select the Capture Device (if one is available), then specify preferred Image Format Details, then click the 'Save' button to save Capture settings.

Capture Configuration		
Device Image Border Key Bindings Preferred Capture Device Settings Device :NONE		v
Input Image Format Details Colour Space : Output Size : Use Device Output 320x240 640x480	Analog Video Details Video Input :NONE  Standard :NONE  Image Cropping Cropping Size :NONE  V	Display Details Aspect Ratio : Box Crosshair :NONE
Alternate Capture Program Control	Capture Program on load	Save Close

Figure 23 Terian ID Creator - Capture Configuration form



# Support

For additional help and support...

Email: <u>help@terian.co.nz</u>

Website: <u>https://www.terian.co.nz</u>