



# 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

### Databases

Microsoft SQL Server 2016

Microsoft SQL Server 2017

Microsoft SQL Server 2019

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 2017 (v12) -> CC 2021 (v16)

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>

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

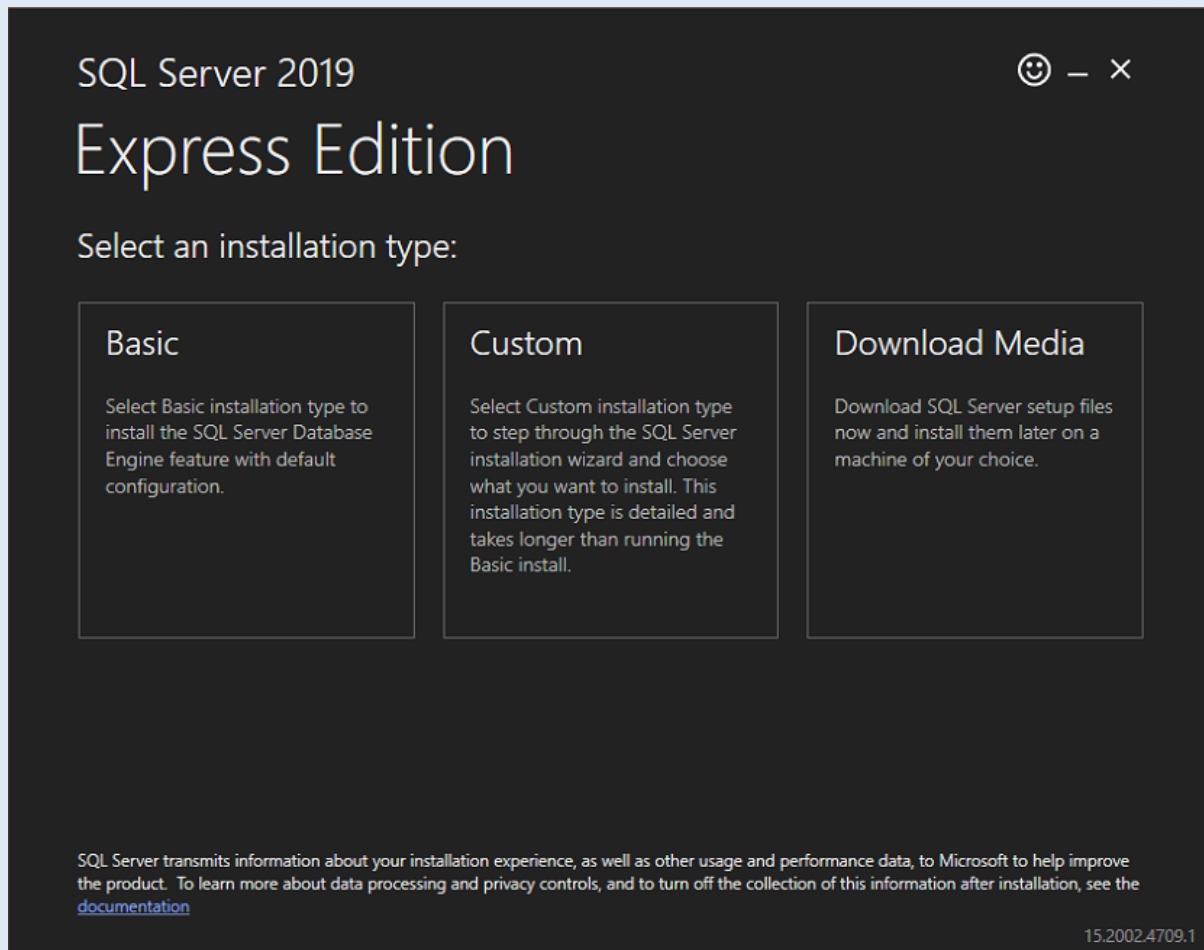
<https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms>

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 2019 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.

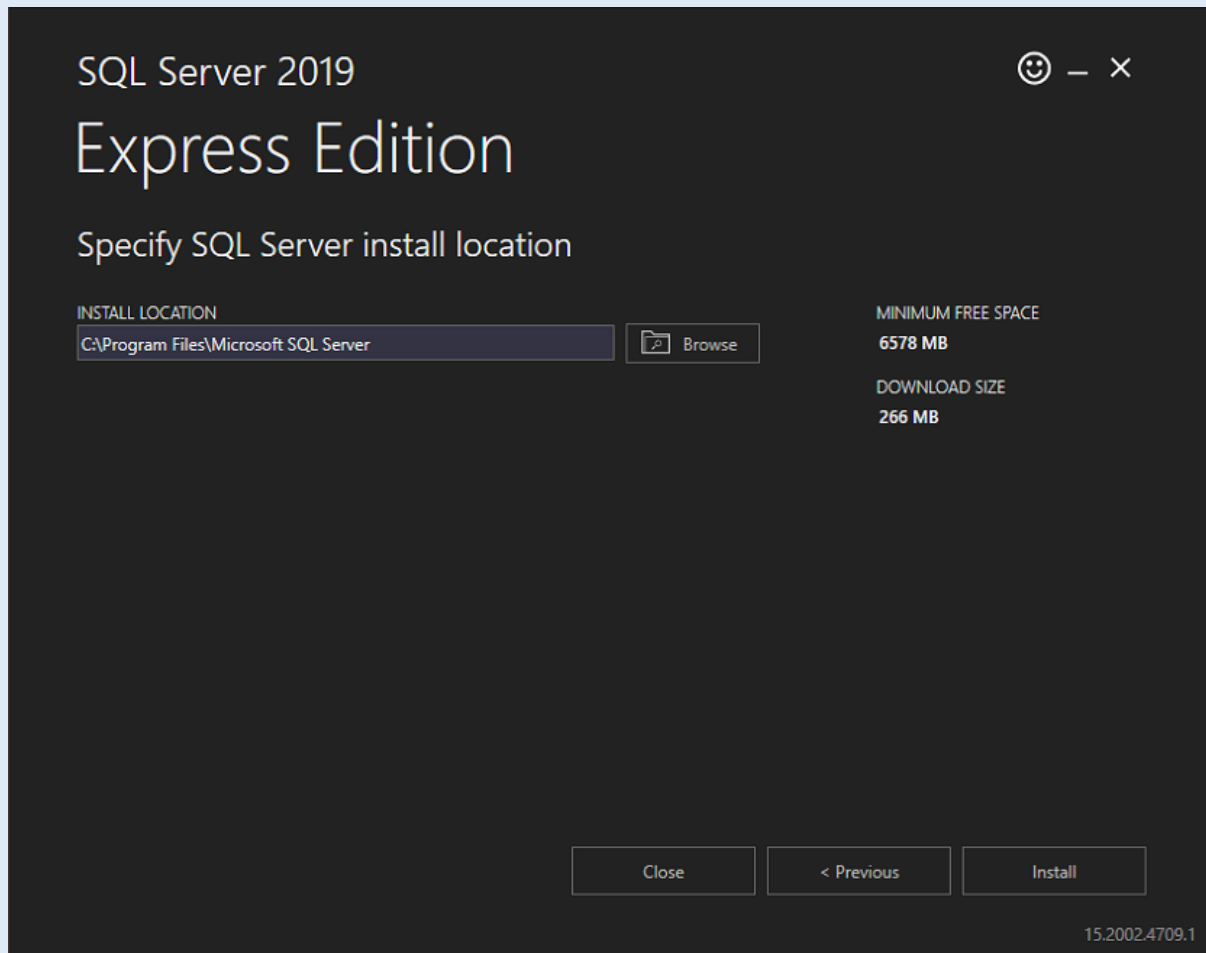


*Figure 1 SQL Server 2019 Express Edition Installation Wizard*

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 2019 Express Edition, however for this documentation we stick to the defaults.



*Figure 2 SQL Server 2019 Express Edition Installation Location*



## Installation Process

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

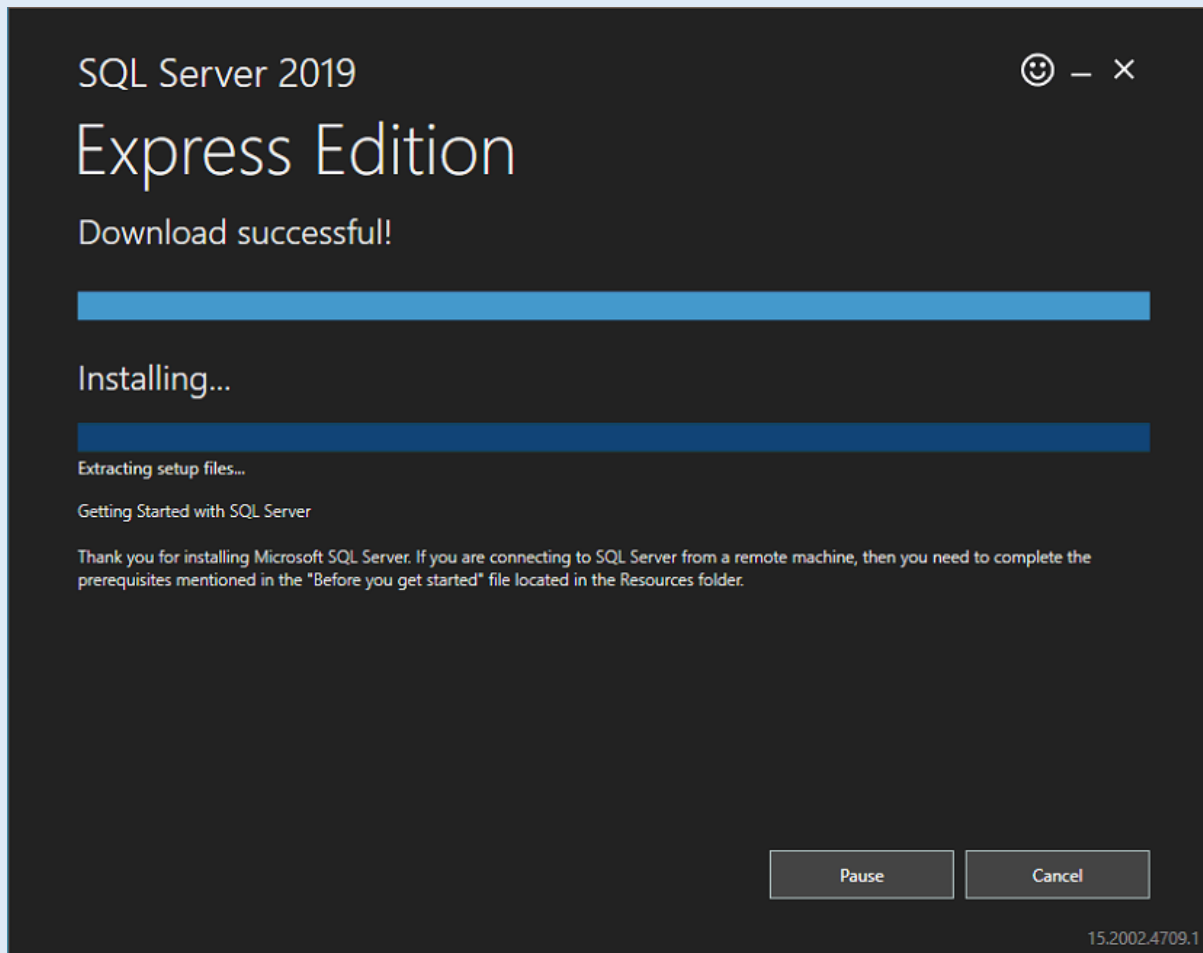


Figure 3 SQL Server 2019 Express Edition Installation Process

## Installation Completion

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

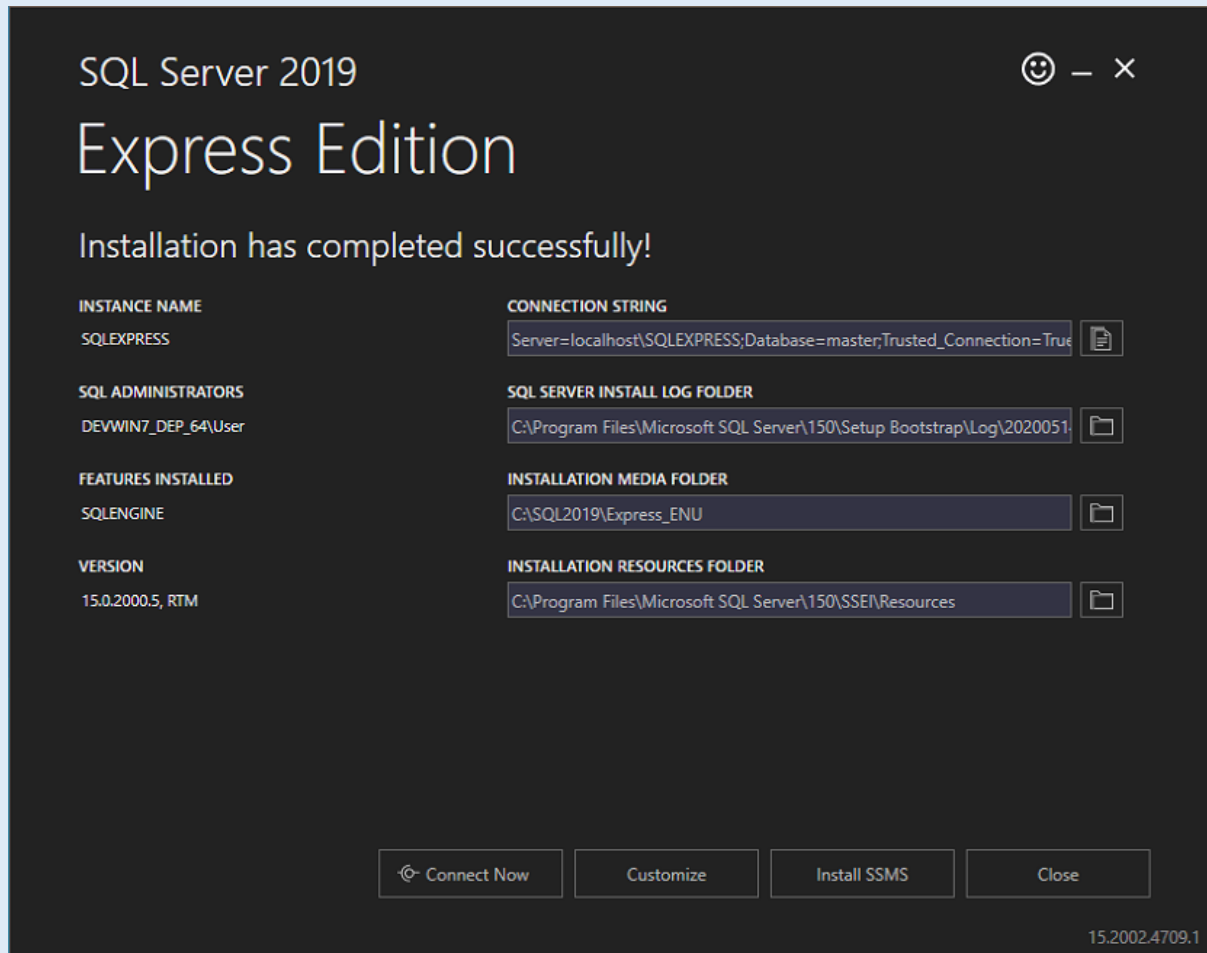


Figure 4 SQL Server 2019 Express Edition Installation Completion

## Step 2 - Install Terian ID Creator Application

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

Both the installer application and ID Creator application files will be digitally signed by 'Sjones Limited', if your installer or application is not digitally signed you may have a corrupt or modified download.

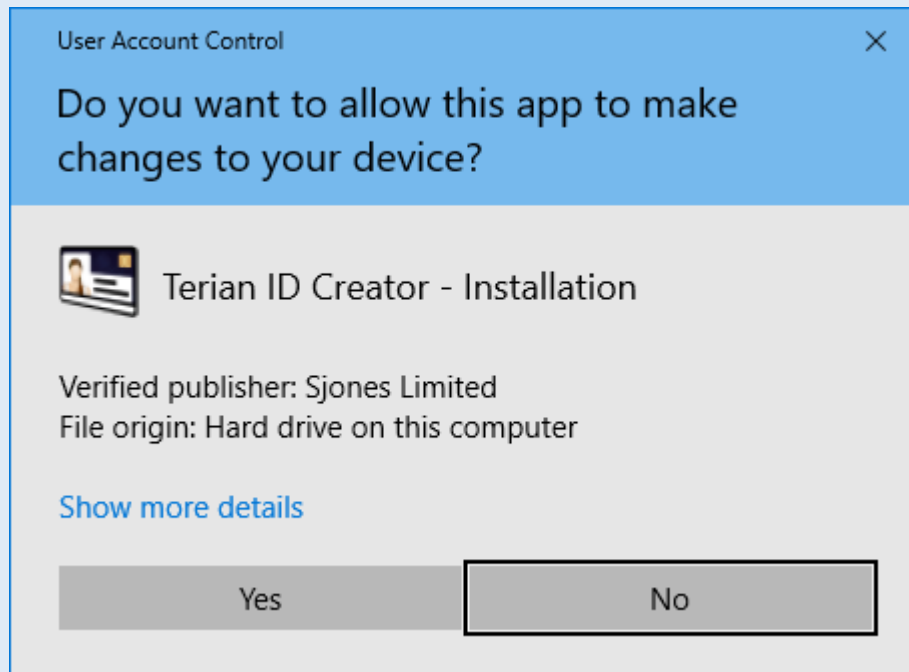


Figure 5 Terian ID Creator Installer – Digital Signature

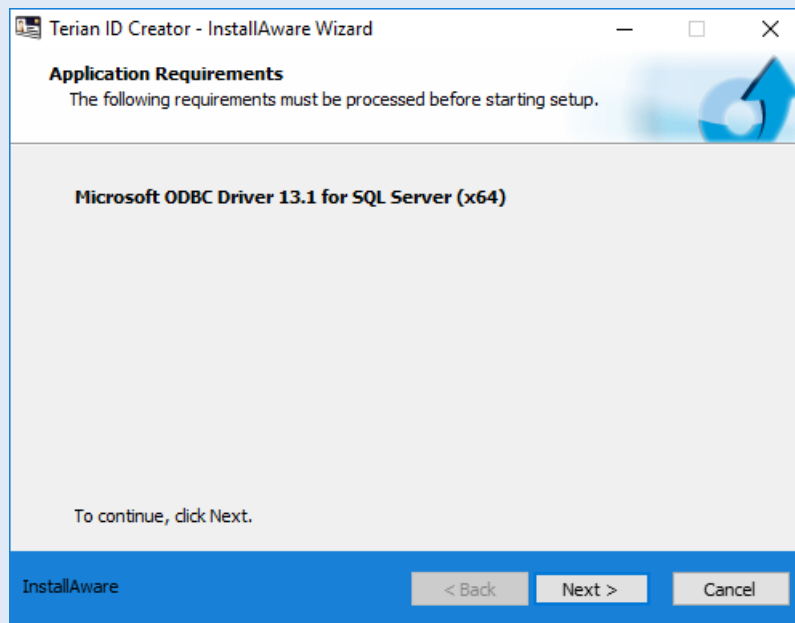


Figure 6 Terian ID Creator Installer

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.

#### Microsoft ODBC Driver 13.1 for SQL Server

Microsoft ODBC Driver 13.1 for SQL Server can be downloaded here...

<https://www.microsoft.com/en-us/download/details.aspx?id=53339>

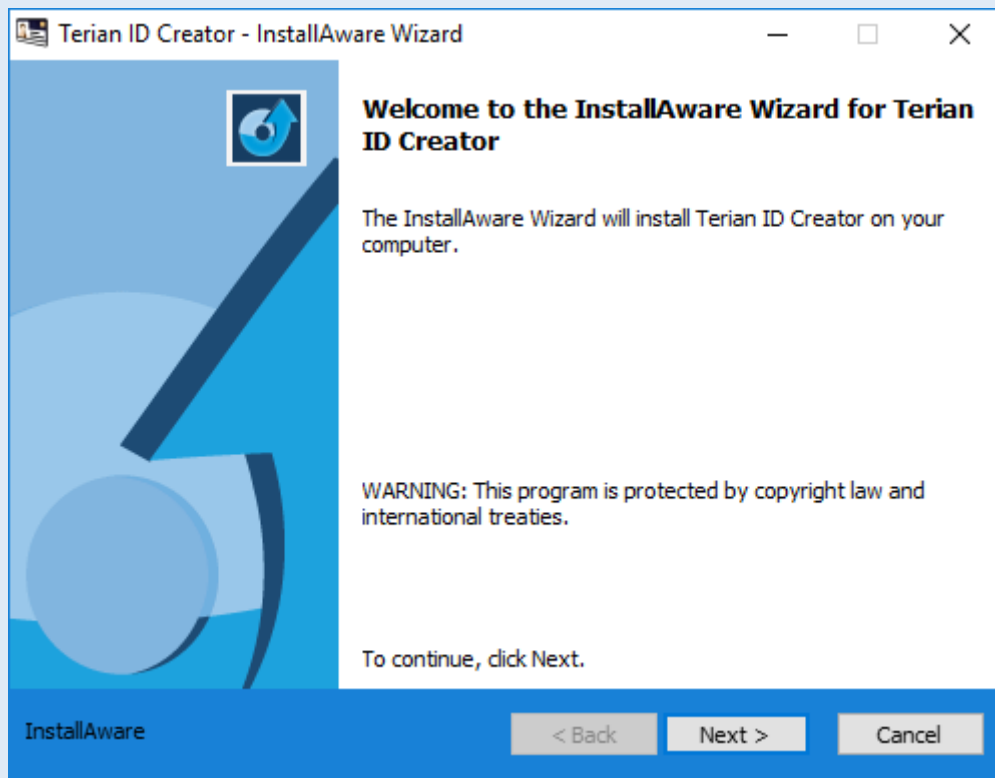


Figure 7 Terian ID Creator Installer

## Default Installation Folders

The default installation folders are as follows...

Application folder

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

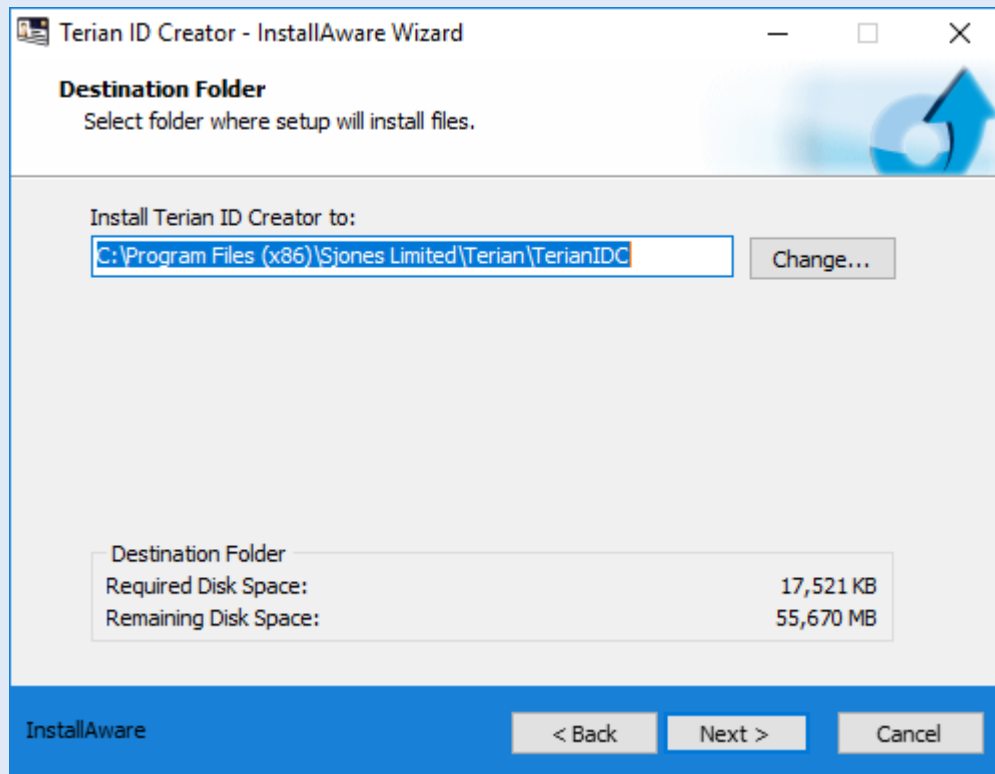


Figure 8 Terian ID Creator Installer – Application Folder

## Data files folder

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

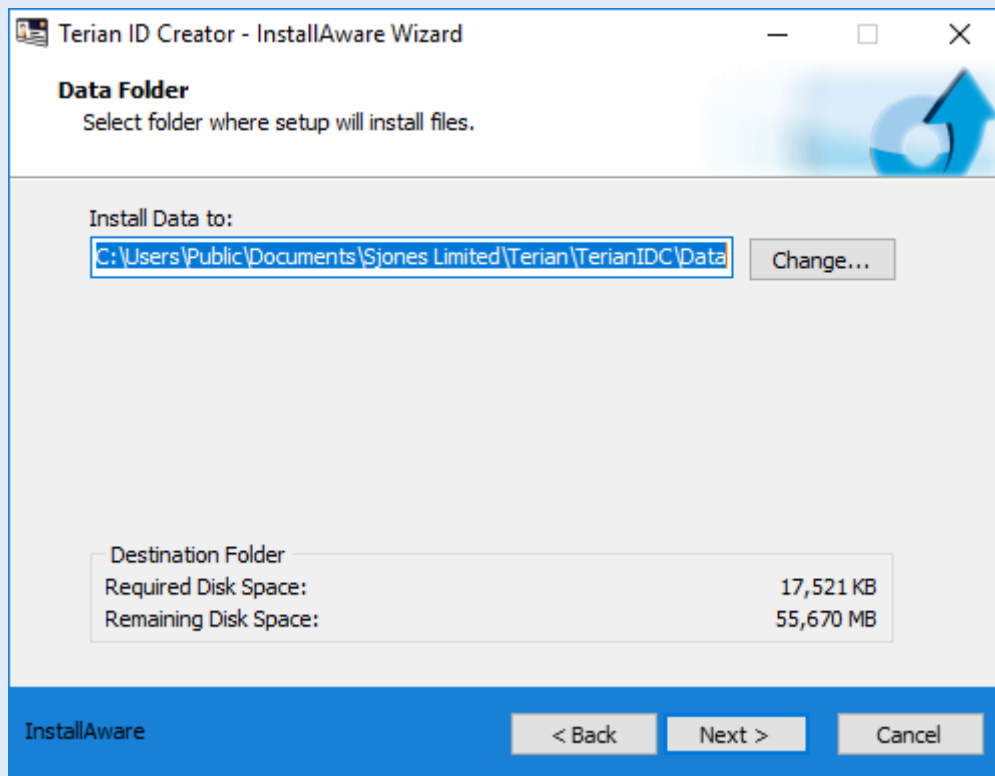


Figure 9 Terian ID Creator Installer – Data Folder

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.

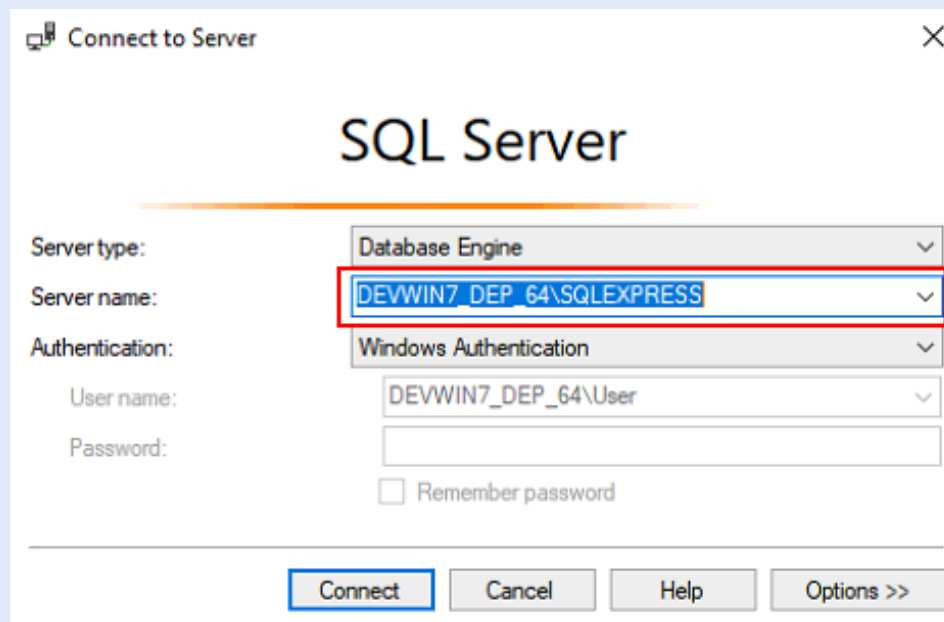


Figure 10 Connecting to SQL Database Server

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 v1.90 – Database Objects – New Installation.SQL'

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

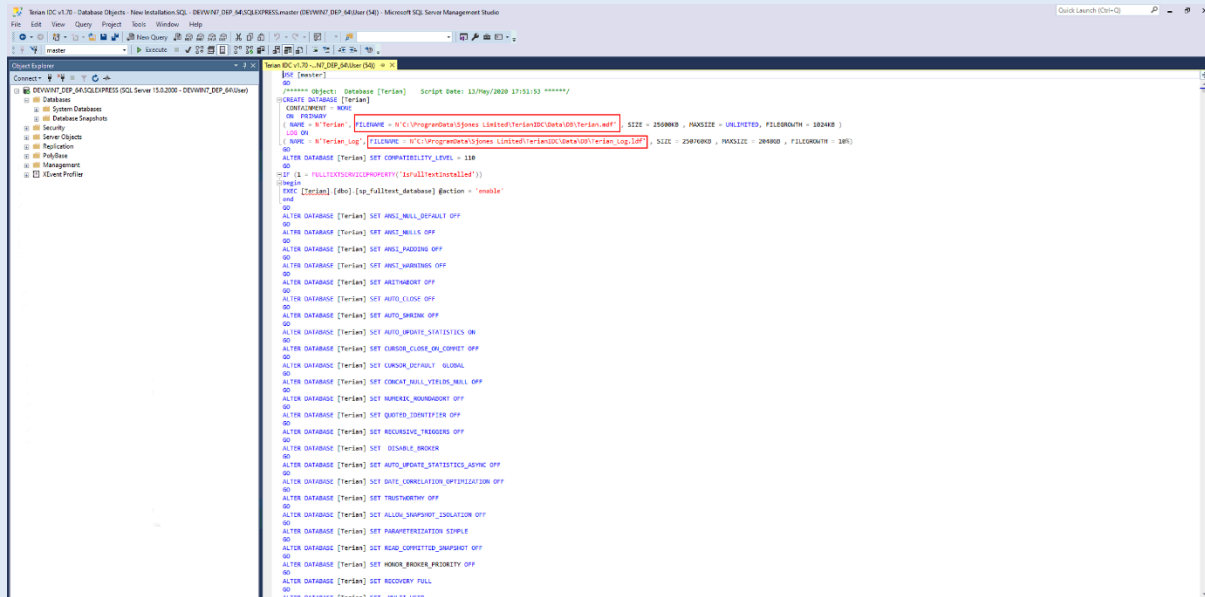


Figure 11 Terian ID Creator database schema loaded in SSMS

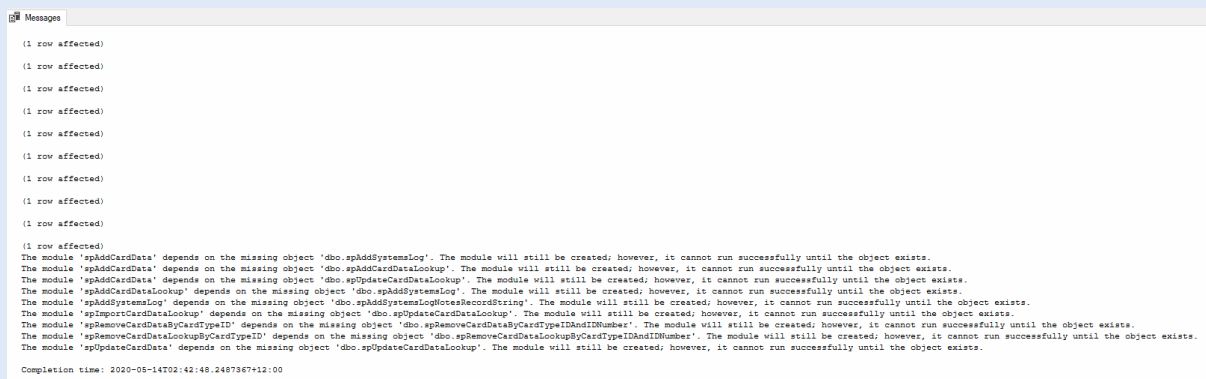
You may need to edit the folder path contained in both 'FileName' attributes of the 'Create Database' statement.

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...



```
Messages

(1 row affected)

(1 row affected)

(1 row affected)

(1 row affected)

(1 row affected)

(1 row affected)

(1 row affected)

(1 row affected)

(1 row affected)

(1 row affected)

(1 row affected)

The module 'spAddCardData' depends on the missing object 'dbo.spAddSystemLog'. The module will still be created; however, it cannot run successfully until the object exists.
The module 'spAddCardData' depends on the missing object 'dbo.spAddCardDataLookup'. The module will still be created; however, it cannot run successfully until the object exists.
The module 'spAddCardDataLookup' depends on the missing object 'dbo.spAddSystemLog'. The module will still be created; however, it cannot run successfully until the object exists.
The module 'spAddSystemLog' depends on the missing object 'dbo.spAddSystemLogNotesRecordDining'. The module will still be created; however, it cannot run successfully until the object exists.
The module 'spImportCardDataLookup' depends on the missing object 'dbo.spUpdateCardDataLookup'. The module will still be created; however, it cannot run successfully until the object exists.
The module 'spRemoveCardDataByCardTypeID' depends on the missing object 'dbo.spRemoveCardDataByCardTypeIDAndIDNumber'. The module will still be created; however, it cannot run successfully until the object exists.
The module 'spRemoveCardDataLookupByCardTypeID' depends on the missing object 'dbo.spRemoveCardDataLookupByCardTypeIDAndIDNumber'. The module will still be created; however, it cannot run successfully until the object exists.
The module 'spUpdateCardData' depends on the missing object 'dbo.spUpdateCardDataLookup'. The module will still be created; however, it cannot run successfully until the object exists.

Completion time: 2020-05-14T02:42:48.2487367+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...

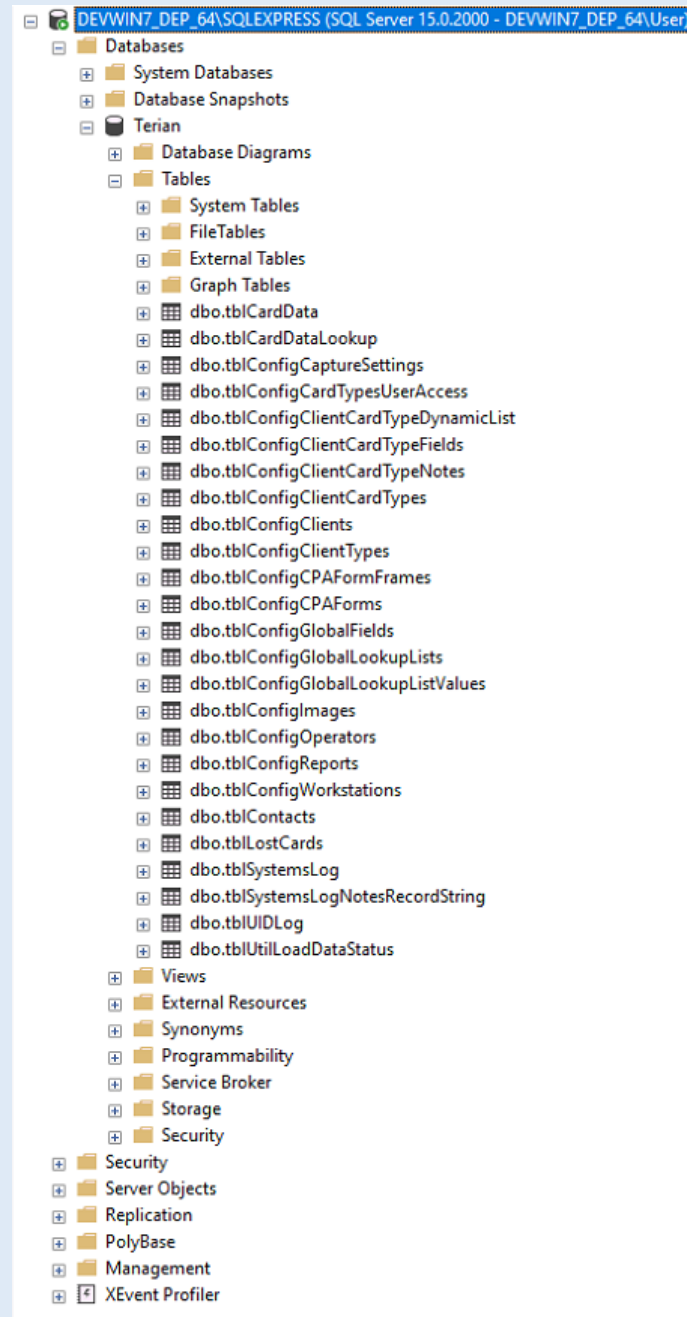


Figure 13 Terian ID Creator Database Objects

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

Upon successful starting Terian ID Creator the Logon Form will be displayed...



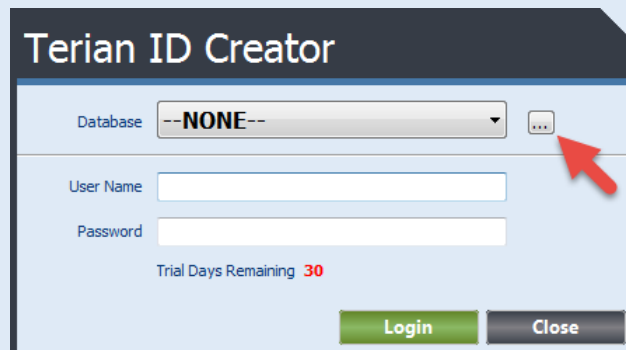
v1.90.32.928

*Figure 14 Terian ID Creator Application*

Sjones Limited  
01904 611111

## Database Connection Configuration

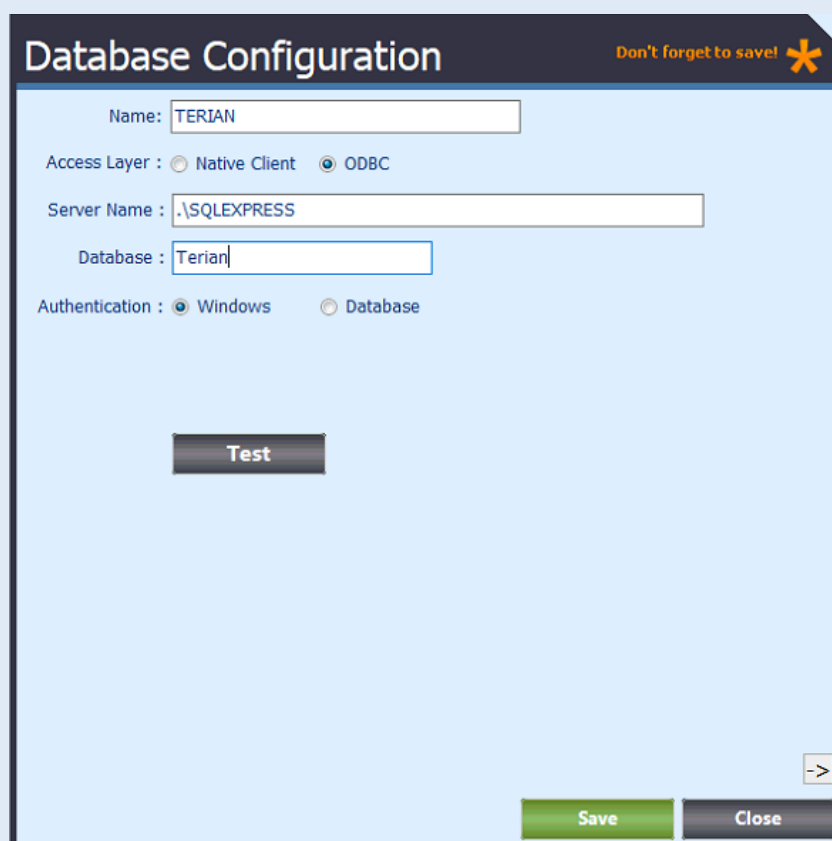
Click the 'Create Database Configuration' button to open the database configuration form.



The image shows the 'Terian ID Creator' logon window. It has a title bar with the text 'Terian ID Creator'. Inside the window, there is a 'Database' dropdown menu currently set to '--NONE--'. To the right of the dropdown is a small button with three dots. A red arrow points to this button. Below the dropdown are two text input fields: 'User Name' and 'Password'. At the bottom, there is a status bar that says 'Trial Days Remaining 30'. At the very bottom are two buttons: 'Login' (green) and 'Close' (grey).

Figure 15 Terian ID Creator Logon form

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



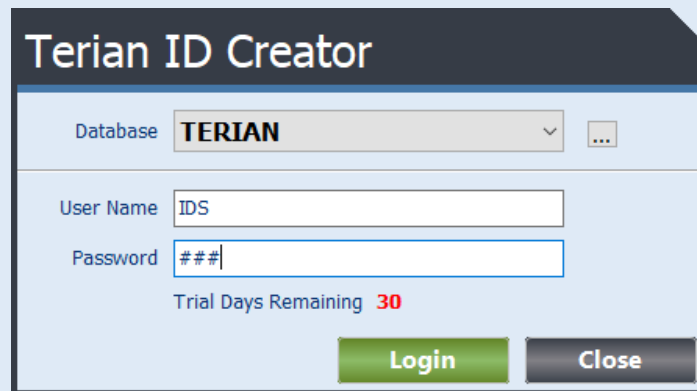
The image shows the 'Database Configuration' window. It has a title bar with the text 'Database Configuration' and a small orange star icon with the text 'Don't forget to save!'. Inside the window, there are several fields and options: 'Name:' with a text box containing 'TERIAN'; 'Access Layer:' with two radio buttons, 'Native Client' and 'ODBC' (which is selected); 'Server Name:' with a text box containing '.\SQLEXPRESS'; 'Database:' with a text box containing 'Terian'; and 'Authentication:' with two radio buttons, 'Windows' (which is selected) and 'Database'. In the center of the window is a large 'Test' button. At the bottom right, there is a small button with a right-pointing arrow. At the very bottom are two buttons: 'Save' (green) and 'Close' (grey).

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.

## Logon to Terian ID Creator

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

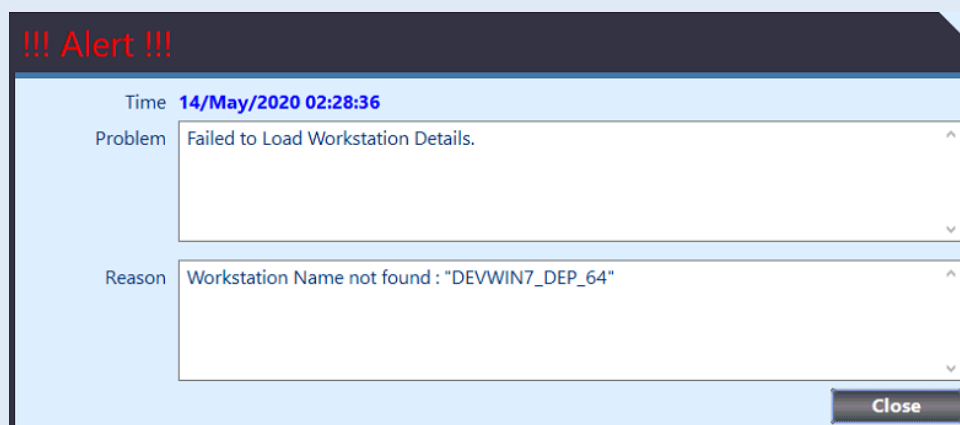


The image shows the Terian ID Creator logon window. It has a title bar 'Terian ID Creator'. Below the title bar, there is a 'Database' dropdown menu with 'TERIAN' selected. Below that, there are two text input fields: 'User Name' with 'IDS' entered and 'Password' with '###' entered. Below the password field, it says 'Trial Days Remaining 30'. At the bottom right, there are two buttons: 'Login' (green) and 'Close' (grey).

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.



The image shows an alert window titled '!!! Alert !!!'. It has a 'Time' field with the value '14/May/2020 02:28:36'. Below that, there is a 'Problem' field with the text 'Failed to Load Workstation Details.' and a 'Reason' field with the text 'Workstation Name not found : "DEVWIN7\_DEP\_64"'. At the bottom right, there is a 'Close' button.

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.

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.

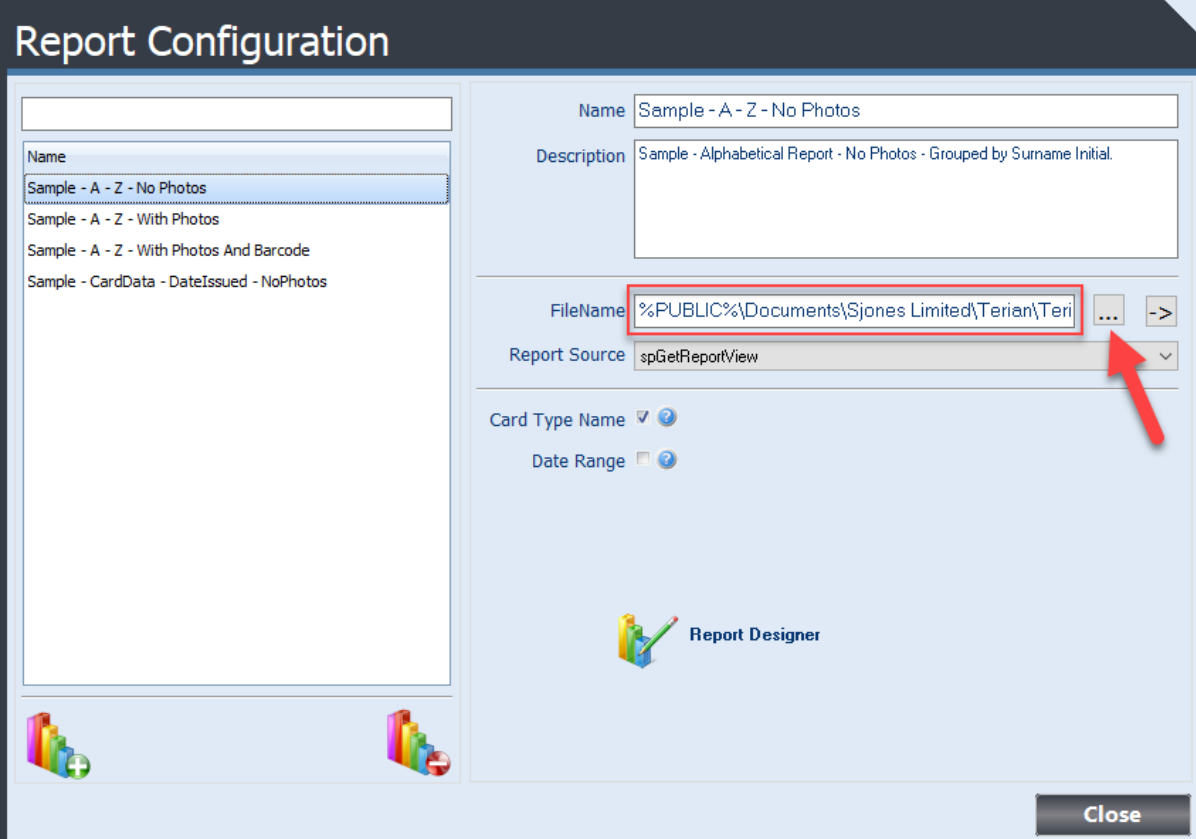


Figure 20 Terian ID Creator - Report Configuration form

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.

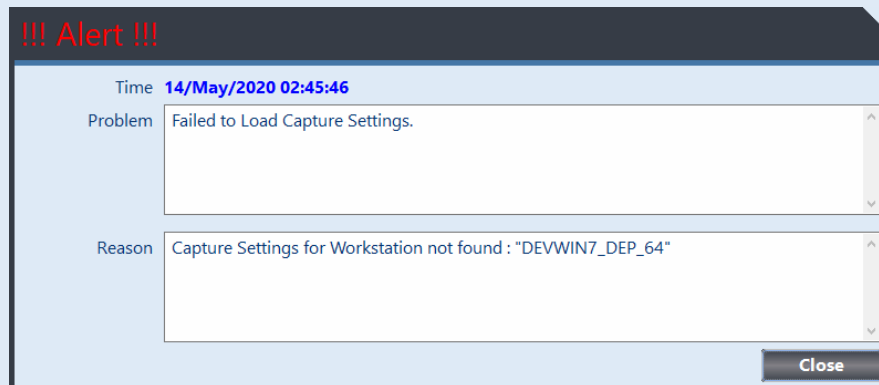


Figure 21 Terian ID Creator - Capture Settings Not Found Alert

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

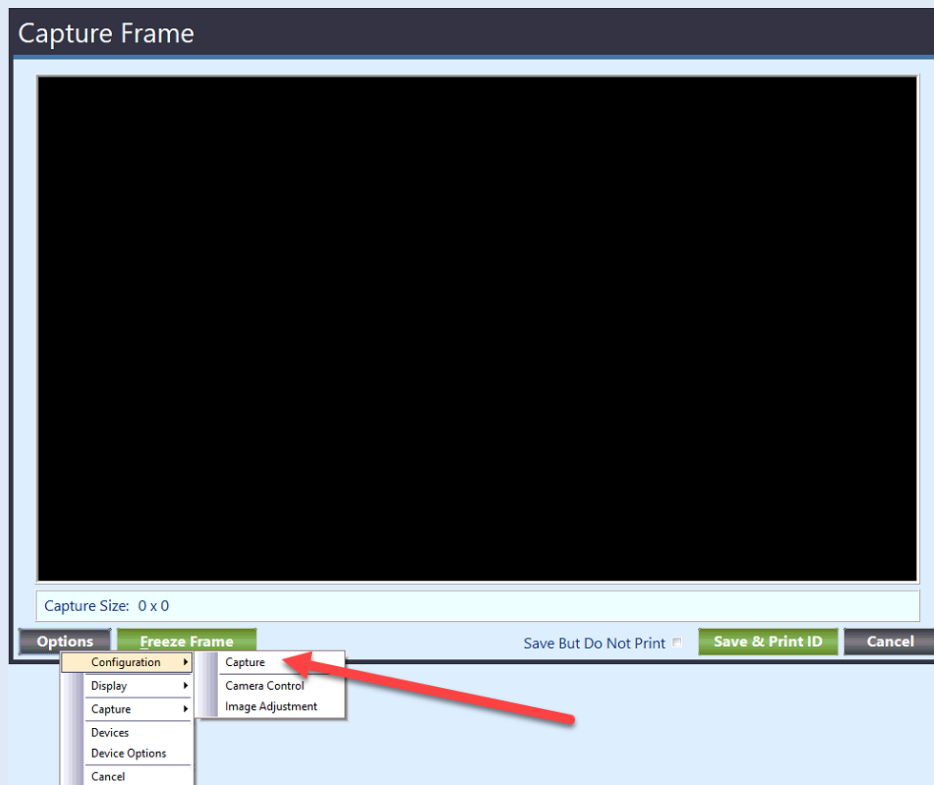


Figure 22 Terian ID Creator - Capture Frame form

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

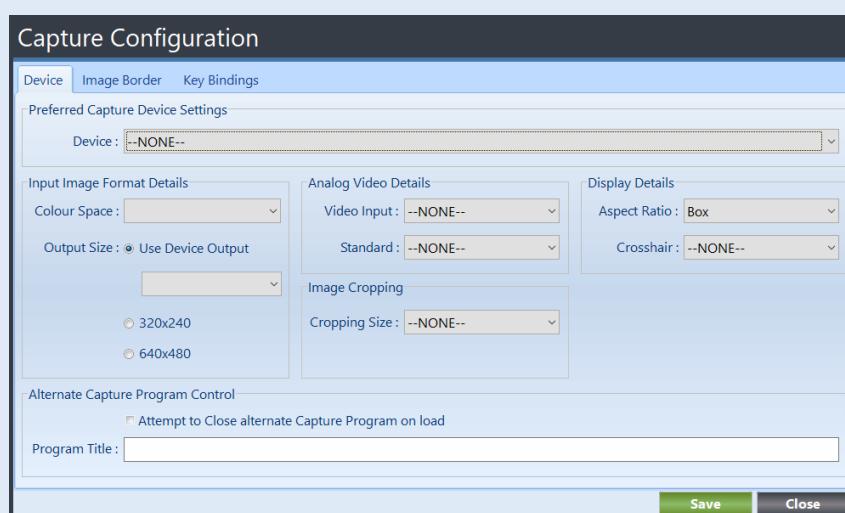


Figure 23 Terian ID Creator - Capture Configuration form

## Support

For additional help and support...

Email: [help@terian.co.nz](mailto:help@terian.co.nz)

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