

BadgeBuilder® Networking Setup

Step-by-Step Instructions

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The following document describes the setup of a server/client environment for the BadgeBuilder® line of Badge creation products. Please note that the LXI/Direct version of the BadgeBuilder® software is not network aware and is not covered by this document.

General Concepts

BadgeBuilder® is a Microsoft ODBC compliant application requiring the creation of, or attachment to, an ODBC compliant database. That database must reside in a location where each BadgeBuilder® workstation has network access and has read & write permissions. This database server does not require BadgeBuilder® to be installed, although it is acceptable to use the primary BadgeBuilder® workstation as a “server” if that is desired.

The primary BadgeBuilder® station will also be used to create an IDC file, a photograph directory and some associated helper files. These files must be stored in a location that provides network clients with read and write access. There are no requirements that the IDC file and it’s associated helper files be stored in any particular directory or even on the same machine. As long as they are fully accessible from the network, that is enough.

Secondary BadgeBuilder® stations will always use the network to access the shared IDC file created at the Primary station. The secondary station will create and use a local ODBC entry that references the networked database resources. Ideally there should be nothing additional required on Secondary Stations.

Primary Station Setup

This set of instructions assumes that BadgeBuilder® has been successfully installed on the PC that will be the primary location for badge creation.

1. Start BadgeBuilder®.
2. Login with Master level privileges.
3. From the BadgeBuilder® menu, Select “File” – “New Badge Database”
4. In the “Save New Database As” dialog, select the folder you wish to use for your IDC file and enter its name. **IMPORTANT:** The folder you choose must be one that is available to your other stations over your network. The location can be on the Primary Station itself, or can be located on a network share. The folder must have full read and write access or the network stations will not work properly
5. When the folder is chosen and the IDC file name entered, click “Save”
6. In “Badge Table Creation Guide – Step 1”, you must create a new Data Source to reference your database and it’s location. To do this, click “New”.
7. In the “Create New Data Source” dialog, the system will ask you for a type of data source. While you can choose any of the 3, the default type “File Data Source” is fine for this application. Click “Next” to proceed.
8. On the screen that appears you will be asked to select a driver for the database type you wish to setup. The selection to be made here will vary widely depending on the type of database that has been selected for use in this application. The following provides guidelines for assisting you with this selection.
 - a. **Non-Directory-Based Databases:** If you intend to use a database server running either on the primary machine or elsewhere, there will be connection parameters that will be required. This may include, but is not limited to, the name/IP address of the machine, a username, a password and the name of the database you wish to connect to. Databases of this type include, but are not limited to, Microsoft SQL Server, Oracle and IBM DB2.

- b. **Directory-Based Databases.** This style of database does not require a server program and is usually self-contained within a file in a folder either somewhere on the local machine or on a network drive. These databases generally only require that you select the location where you want to create them and most likely will not require a username or password. Databases of this type include, but are not limited to, Microsoft Access, Borland Paradox and Microsoft FoxPro.
9. When the database type has been chosen, click “Next”.
 10. The system will ask you to provide the name of the data source. It is recommended that you accept the default and click “Next”.
 11. The final screen of the “Create New Data Source” sequence will review the information that you have entered. If anything is incorrect, click the “Back” button as many times as need to return to the screen where you made the error. If everything appears to be correct, click “Finish”.
 12. On clicking “Finish”, a dialog (or set of dialogs) will appear that correspond with the database type that you selected. Enter the database-specific information required to create the BadgeBuilder® table in your database.
 13. When the database-specific creation dialog is closed, you should be returned to the “Badge Table Creation Guide – Step 1” dialog. Assuming that you did not choose a data source type other than “File”, you should now click on the “File” radio button in the “Data Source Type” group on the dialog.
 14. In the list of “Existing Data Sources”, find the name of the data source that you just created. Single left-click your mouse on the entry to highlight it, and then hit “Next>”.
 15. In “Badge Table Creation Guide – Step 2”, BadgeBuilder® is looking for the name of the name that it should create. It will suggest a name that is the same as that which you gave to the IDC file. It is recommended that you keep the table name suggested by the system and click “Next>”.
 16. In the “Select Badge Template Directory” dialog, BadgeBuilder® is asking for you to point it to a folder that contains at least one CTM file. If you have not done a design yet, we recommend that you simply use the sample.ctm located in the BadgeBuilder® installation directory. When you have selected the directory, click “OK”.
 17. In “Badge Table Creation Guide – Step 3”, you must select the template(s) you wish to use, the photo compression type that you prefer and create fields / import data as required. If you need assistance with either the field creation or data import process, please click the “Help” button. When you have setup the database as you see fit, click “Next>”.
 18. In the “Field Assignments” dialog, you have the option of assigning database fields and/or static data to the badge. If you need assistance with the field assignments process, please click the “Help” button. When you have finished assigning data to the badges, click “Save”.
 19. BadgeBuilder® will prompt you for the name of the template you just assigned data to. You may use the suggested name or enter one of your own. When finished, click “OK”. This process described in the last two steps will repeat for as many templates as were selected in “Badge Table Creation Guide – Step 3”.
 20. When data has been assigned to the last of the selected templates, the database will go through a creation process and a blank copy of the template you selected should now appear on the screen. The primary badge station database is now ready for use.

Secondary Station(s) Setup

This set of instructions assumes that BadgeBuilder® has been successfully installed on the PC and that the instructions in “Primary Station Setup” have resulted in the successful creation of a database and IDC file.

1. Open BadgeBuilder®
2. Login with Master privileges.
3. From the BadgeBuilder® menu, Select “File” – “Open Badge Database”.
4. Browse to the shared network folder where the IDC file was created in the Primary station setup.
NOTE: BadgeBuilder® is fully compliant with the UNC-style naming convention used in Microsoft networking (i.e. [\\server\share](#)). It is also perfectly acceptable and sometimes more convenient to assign a drive letter (i.e. R:) to the network share. We strongly recommend that if there is more than one Secondary station and you will be using drive letters, that you use the SAME drive letter on all stations. This greatly reduces confusion if troubleshooting is required in the future.
5. Select the appropriate IDC by single left clicking on the name of the IDC and then clicking “Open”.
6. An information dialog should immediately appear referencing an error. The error should take the general form of the following, “ERROR: Unable able to find table ‘table name’ in data source ‘data source name’. Please revise the data source to point to the correct database in the next dialog.” When you see this dialog, click “OK”.
7. The dialog for selecting and configuring your specific database will come up. Depending on the style of database that you are using, you must select the database file or connect to the database resource that was setup during the setup of the Primary station. When you have finished entering the required data, close the setup dialog via the “OK”, “Finish” or equivalent button.
8. If the permissions on the database and IDC file directory are correct, the badge file should now be open.

System Tests

To confirm that the network setup is fully operational, we suggest that you perform the following tests:

1. On the Secondary station, close the BadgeBuilder® database down and open it again. The database should open directly without any errors.
2. With the database open on the Secondary station, create a new test record and take a photograph on the Primary station. Search for the newly created record on the Secondary station. Confirm that the record can be found and that the photograph shows up correctly.
3. Attempt to edit the record found in Test #2 using the Secondary station. The data should update in the database without errors. Confirm the updated data on the Primary station by refreshing the database and searching for the test record.
4. If the Secondary station has a full copy of BadgeBuilder® running on it*, attempt to take picture for the test badge. The picture should appear on the badge without error. Confirm the updated picture on the Primary station by refreshing the database and searching for the test record.

* - BadgeBuilder® stations running with “Network” keys can open and edit databases, but CANNOT capture photographs

Important Setup Notes

1. The client station is separate in its capabilities as far as the program is concerned. If you use an optional feature on the Server you need to check to see whether you need to purchase it for the client(s). This is particularly true if you use the Dossier feature to expand to more than 10 fields. A database with 10 or more fields will not open on a system that does not have the Dossier feature.
2. In a networked situation, we recommend you do not use a BadgeBuilder® defined counter field. The reason for this is that ODBC databases don't deal with counters the same way (and in some cases not at all). We have implemented an internal counter in our IDC file to try and compensate for this. However, in a networked environment, there is the potential for duplicate counter numbers and other errors.
3. If you use the reporting module, be aware that it will only show activity for the station that you are running the report on.