



Enrollment Manager Guide

identiMetrics Biometric ID Platform™

Version 2.4

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Enrollment Manager Guide

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Overview

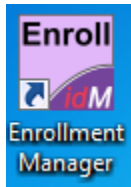
The Enrollment Manager is the management interface for the three services, Biometric Engine, ID Provider and Distributor that comprise the identiMetrics Biometric ID Platform. You will use it to enroll, manage your enrollment records, manage the users of the Enrollment Manager and manage the services themselves.

This guide will describe the operation of the Enrollment Manager when connected to a Biometric Engine and will describe the differences when connected to an ID Provider or Distributor. In general, the title bar of a window will indicate where you are and will show the Display Name of the connected service.

In this document, the Display Name of the services will simply be the type of the service itself. For example, if connected to a Biometric Engine the title bar of the login window is “Login to Biometric Engine” and of the main window is “Enrollment Manager – Biometric Engine”. Unless specifically noted in the description of a window or menu item, the description applies to all of the services.

Starting

Double-click on the **Enrollment Manager** shortcut to run the application. The shortcut can be found on the desktop or in the **Startup | All Programs | identiMetrics** folder.

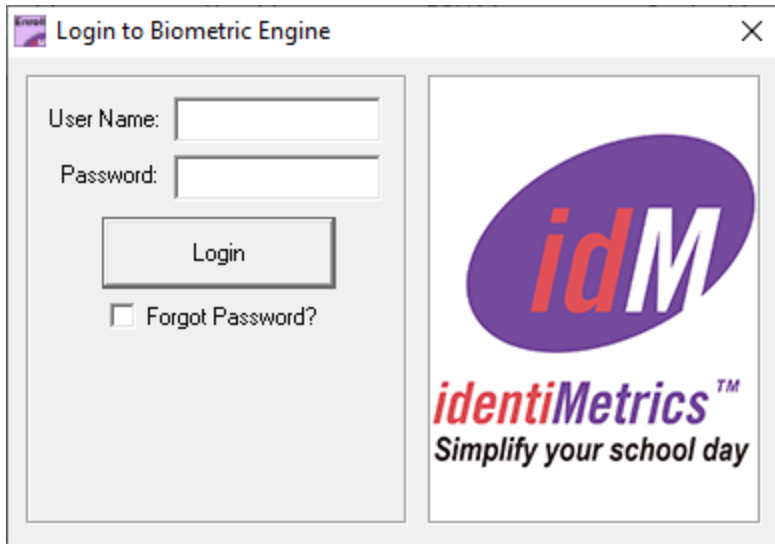


Logging In

Access to the Enrollment Manager is restricted and requires a user name and password. During installation, a default Administrator is created to provide a way to login. Use the user name “admin” and the password “admin” to login the first time. Once you have logged, you should change your profile and setup any additional users that need to access the Enrollment Manager in the future. See the sections **User Management | My Profile...** and **User Management | Users...** for more information.

When the Enrollment Manager starts, it displays the login dialog with the name of the service that you’re connected to shown in the title bar. If you’re connected and this is the correct service, then enter a valid **User Name** and **Password** and click on **Login**.

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Login to Biometric Engine

User Name:

Password:

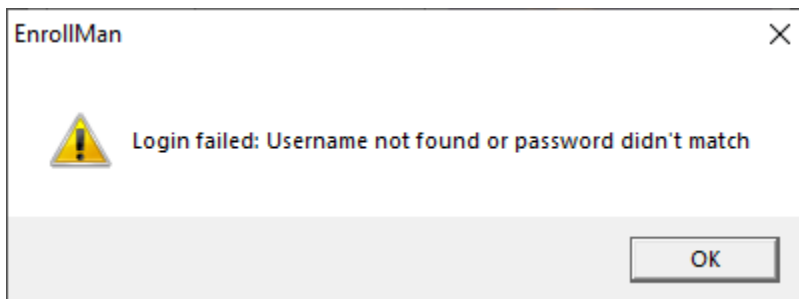
Login

Forgot Password?


idM

identiMetrics™
Simplify your school day

If the **User Name** and/or **Password** are incorrect, the following message will be displayed.



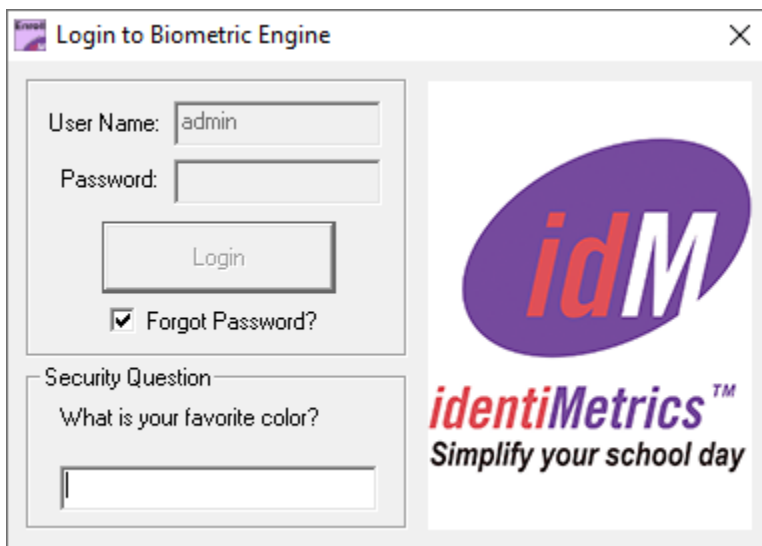
EnrollMan

 Login failed: Username not found or password didn't match

OK

In either case, click **OK** and enter the correct information.

If you believe the **User Name** field is correct but have forgotten your **Password**, then click the **Forgot Password?** box. If the user name is valid, then you will be shown your security question.



Login to Biometric Engine

User Name:

Password:

Login

Forgot Password?

Security Question

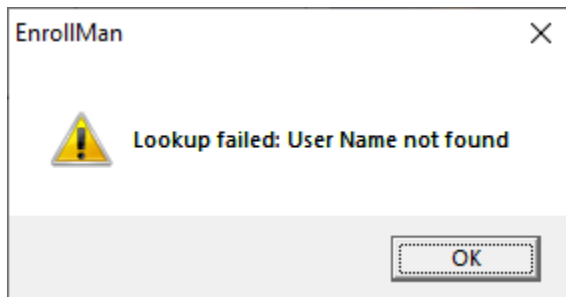
What is your favorite color?

idM

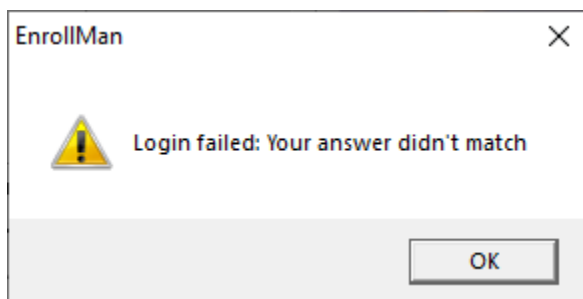
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Enter the answer and click the **Login** button. However, if the **User Name** is incorrect you'll get this error message.

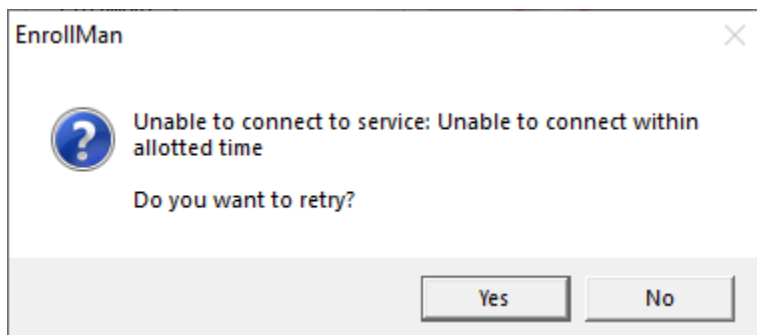
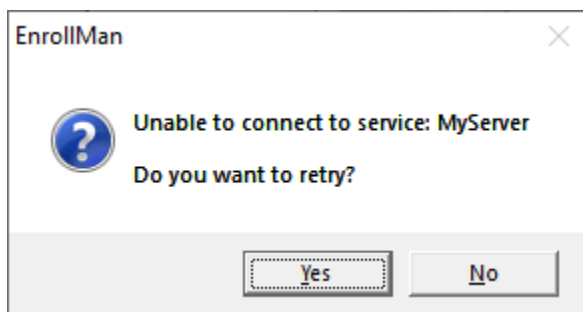


Click on **OK** and ask your administrator for the correct login information. If your answer is incorrect you'll get this message.



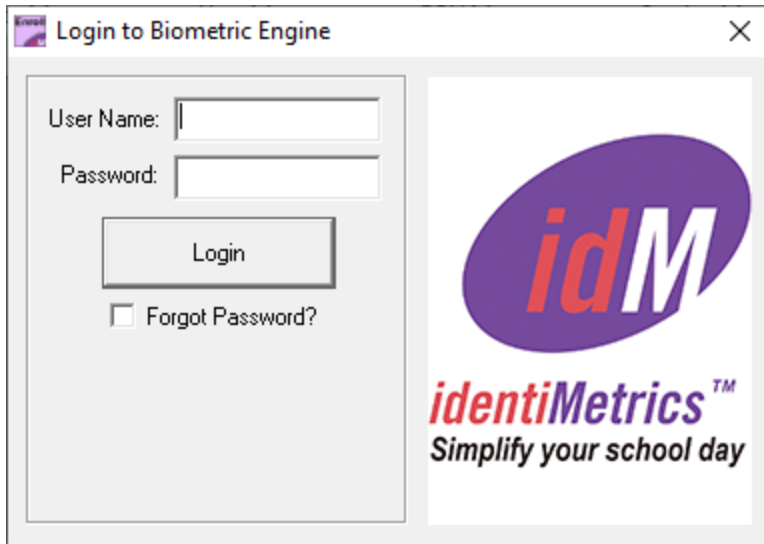
Click on OK and enter the correct information.

If you are unable to connect to the service you will see the following message.

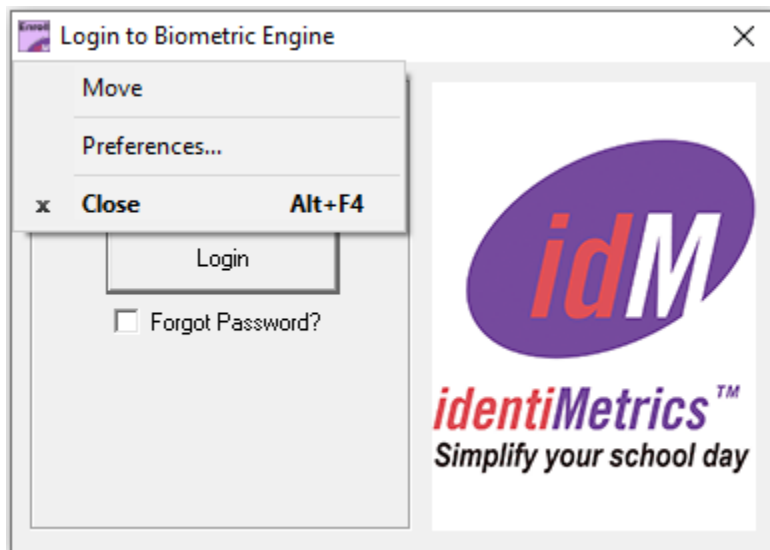


If the settings are correct, then you can click **Yes** to retry. If you're not sure or you want to connect to a different service, then you can click **No** and change your preferences. Afterwards, **Not Connected** will be shown in the title bar to indicate the situation.

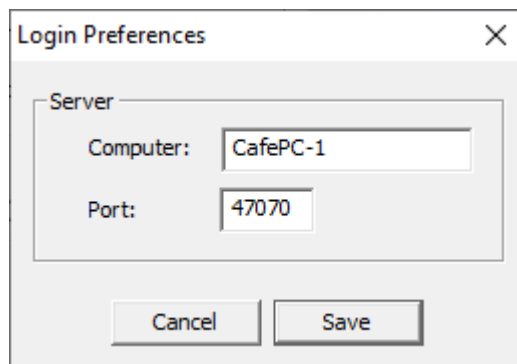
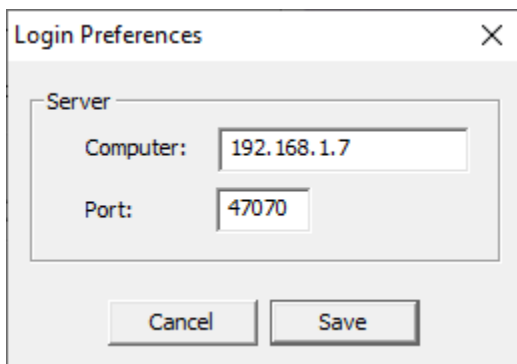
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To change your connection settings, right-click in the title bar area and select **Preferences...** from the menu.



Use the Login Preferences dialog to enter the service's address in the **Computer** field and port number in the **Port** field.

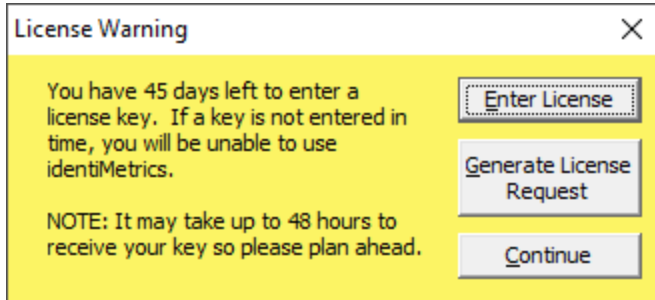


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You can enter the address by using the computer's name or its IP address as shown here. Clicking the **Save** button will save the settings and attempt to connect to the service using the new settings.

Licensing

After successfully logging in, the Enrollment Manager will check the status of the license on the connected service. If the service has not been licensed yet or the license is close to expiring, you will see the License Warning dialog. If you've entered a license, skip to the **Main Window** section.



When first installed you will have 45 days to enter a key and the dialog will look like this.

After entering a key, you will see the dialog again when the key is close to expiring. In that case, the days left will start at 14.

If you haven't requested a key yet, click on the **Generate License Request** button to generate a license request. Once completed the Main window will be displayed. See the **Service Management | Generate License Request** section for more information.

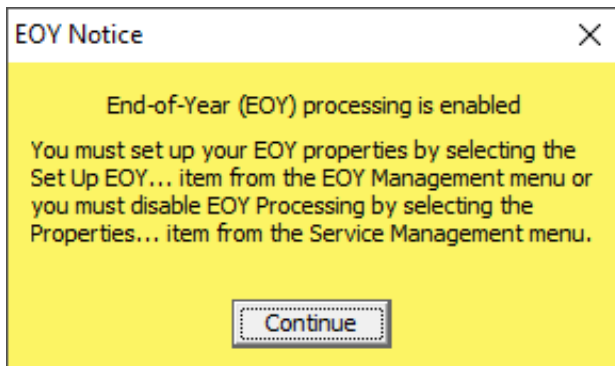
If you have a key and are ready to enter it, click on the **Enter License** button to open the Licensing dialog box. Once you exit the Licensing dialog the Main window will be displayed. See the **Service Management | Enter License...** section for more information on entering a key.

If you choose not to enter a license at this time, click on **Continue** and the Enrollment Manager will display the Main window.

See the [identiMetrics Licensing Guide](#) for detailed information.

End-Of-Year Setup

After checking the license, the Enrollment Manager will check the status of the End-of-Year (EOY) Processing option. After installation or after enabling the EOY Processing property, the following message will be displayed.

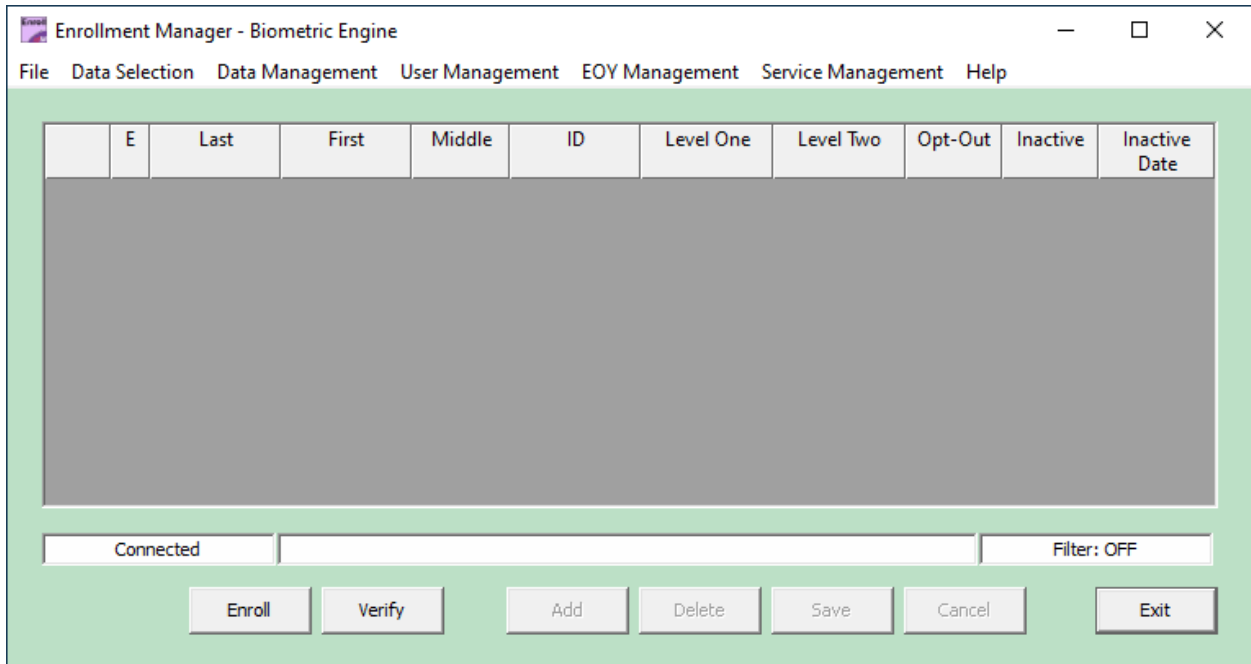


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It will be displayed each time you start the Enrollment Manager until it is set up or disabled. See the **EOY Management** section for more information on setting up EOY and the other EOY warning messages that might be displayed when opening the Enrollment Manager.

Main Window

The main window of the Enrollment Manager contains the menu, the enrollment grid, the action buttons and the status boxes.



At the top of the window, the title bar shows that the Enrollment Manager is connected to the service whose Display Name is 'Biometric Engine'. This is a convenient reminder of what service you're connected to when managing more than one.

Underneath the title bar is the menu. The items will vary depending on what service you're connected to, what type of user is logged in and whether or not EOY processing is enabled. Check out the **Menu Items** section for detailed information on all of the menu items.

Underneath the menu is the enrollment grid. The grid will display your data in a spreadsheet format. Check out the **Enrollment Grid** section for information on how to use the grid.

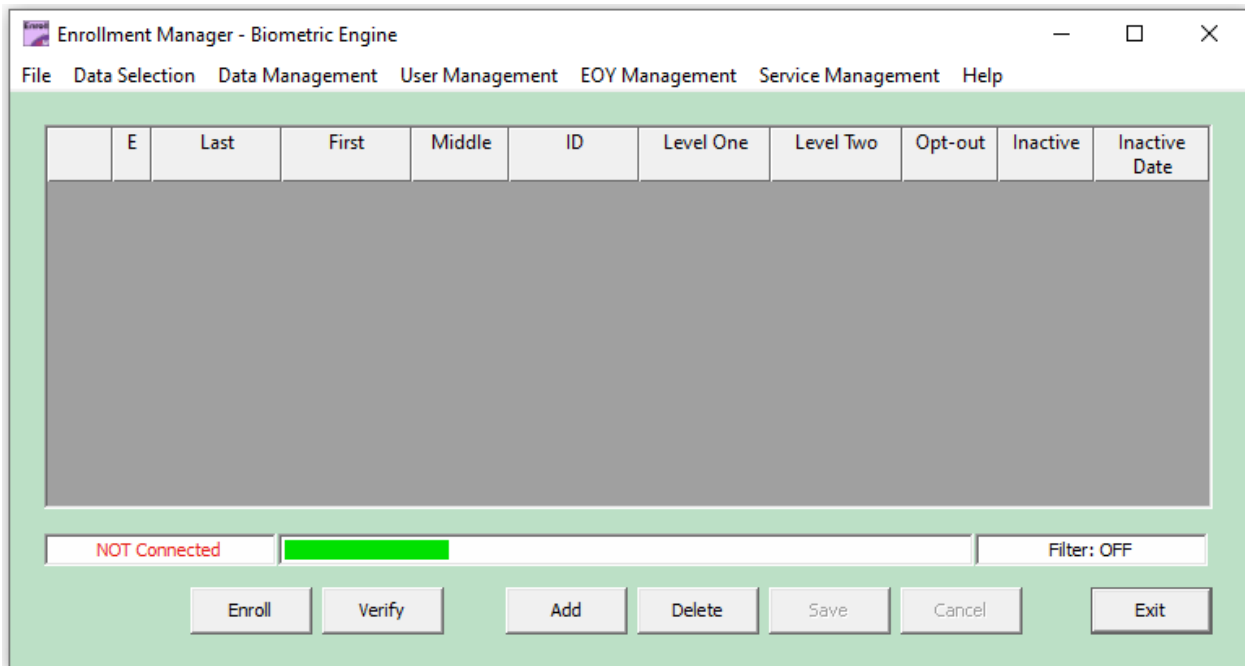
Underneath the grid are the status boxes. The status box on the left always shows the connection status. The **Are You Connected?** section below describes the status in more detail. The status box in the middle shows general status and information about a given action. The status box on the right shows the current Filter settings. When enrolling or verifying, the middle and right status boxes provide instructions and error messages to assist in the process.

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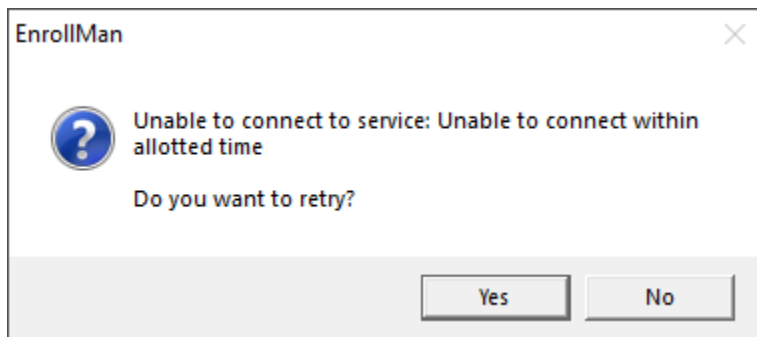
Underneath the status boxes are the action buttons. They work in concert with the grid to provide the tasks required to manually prepare your data for identification. Check out the **Enrollment Grid** section for information on how to use the grid and the action buttons.

Are You Connected?

In the window example above you'll notice that it says **Connected** in the left status box. This tells you the Enrollment Manager is actively talking with a service. While there are some functions that only affect the grid itself, most functions require a connection to the service. If for some reason the service becomes unavailable you will see the **NOT Connected** message in the left status box and progress bar appears in the middle status box.

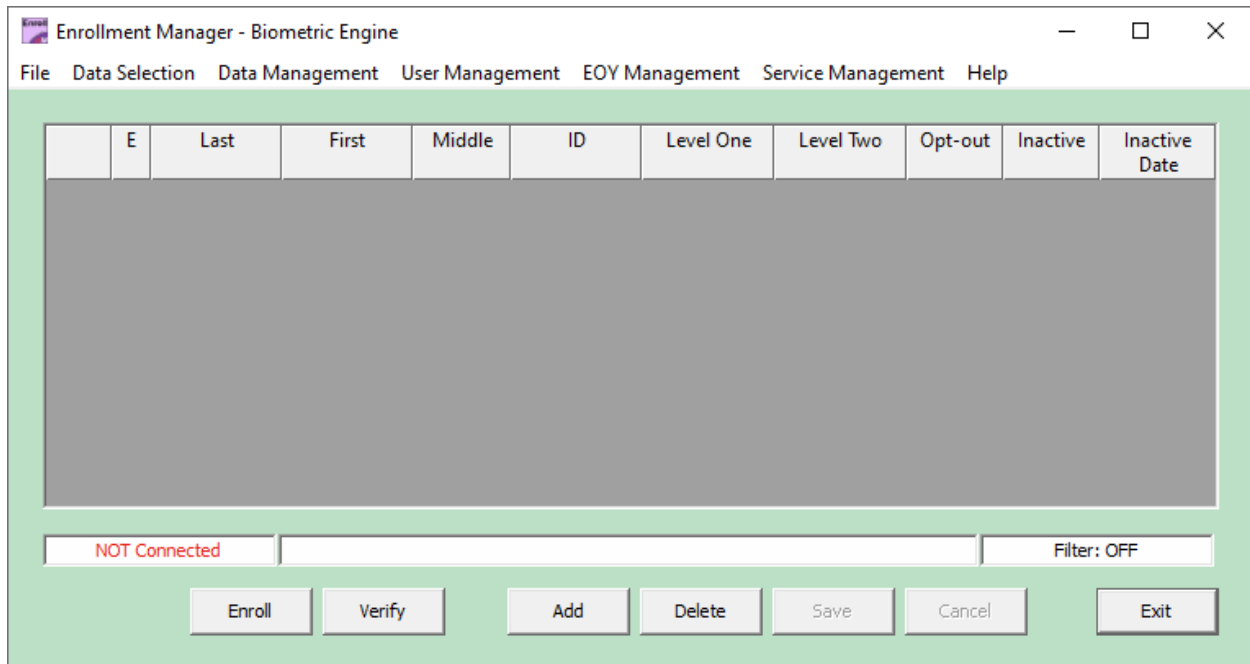


This indicates that the Enrollment Manager is attempting to connect to the service. In most cases it will connect. If it doesn't connect in a short period of time you will see the following message.



Clicking on **Yes** will attempt the connection again, clicking on **No** will cancel the connection attempt and leave the **NOT Connected** status visible.

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You may need to check on the service or the network before attempting another function. Any function that requires a service will attempt to reconnect if invoked when the status is **NOT Connected**. Once the connection is completed, the status will return to **Connected** and the function will complete.

Enrollment Grid

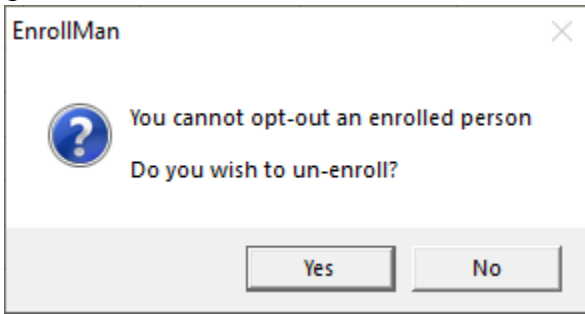
The enrollment grid is like a spreadsheet and will allow you to view and modify the enrollment records that you have requested from the service. The following sub-sections will provide details on using the grid and action buttons. However, the availability of specific grid functions and action buttons will depend on which service you're connected to, the **Edit Mode** setting in the Properties dialog (see the **Service Management | Properties...** section) and the role of the user that is logged in (see the **User Management | User Profiles...** section).

The Columns

- **Last, First, and Middle** – the name of the person being enrolled. The **Middle** column does not have to have a value.
- **ID** – the ID of the person being enrolled. The values in this column must be unique. This is the value that will be sent to the host application after a successful identification.
- **Level One** and **Level Two** – these two columns are used to organize your data. They can contain any text data and are used as part of the default sort. In a school setting one of these columns is set to the person's grade.
- **Opt-out** – the value of this column is either 'Opt-out' or it's empty. You can enter it with any capitalization and it will be adjusted when the changes are saved. If the

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column has 'Opt-out' it means this person cannot be enrolled and indicates that this person will not be scanning. If you try to opt out an enrolled record. You will be given a choice.



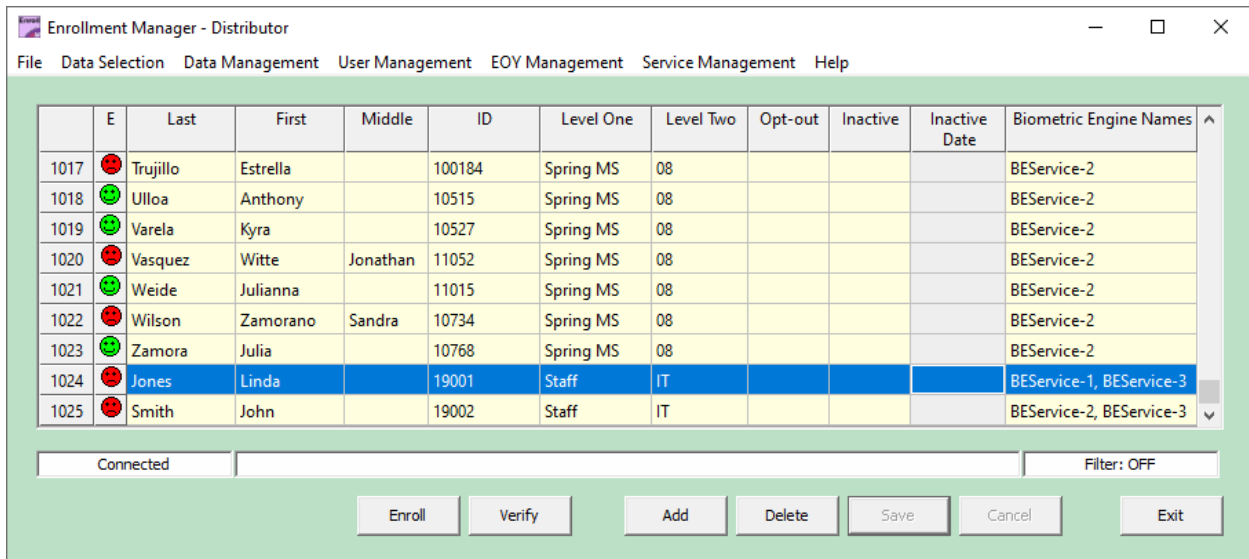
Choosing **Yes** will unenroll the record and save the changes. Choosing **No** will not save the changes.

- **Inactive** and **Inactive Date** – the value of the **Inactive** column is either 'Inactive' or it's empty. You can enter it with any capitalization and it will be adjusted when the changes are saved. If you set it to 'Inactive' and save the change, the **Inactive Date** column will be set with the current date. If you clear the **Inactive** column, the **Inactive Date** will also be cleared.
- **Biometric Engine Names** – the value for this column is one or engine names from the **Synching Biometric Engines** dialog (see the following section for details on working with this column).

Working with the Biometric Engine Names Column

The Biometric Engine Names column is only visible in the grid when connected to a Distributor and when **Distribution Mode** is set to *Somewhere*.

Here is an example of how the grid looks with some data.

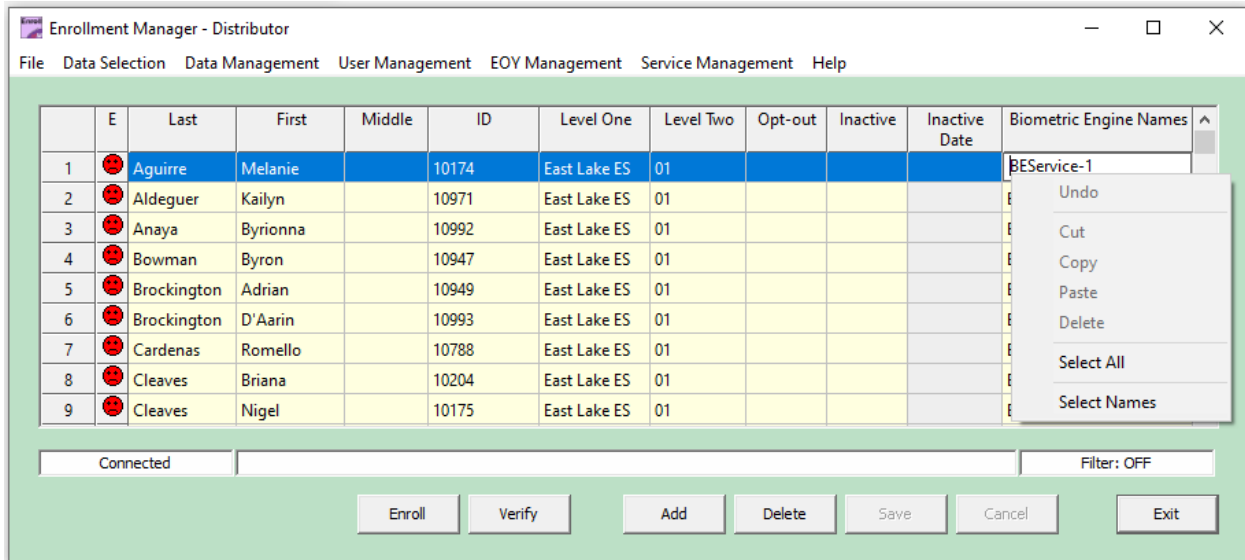


The only difference is the new column 'Biometric Engine Names'. This is a comma separated list of Biometric Engines where this enrollment record will be synched with.

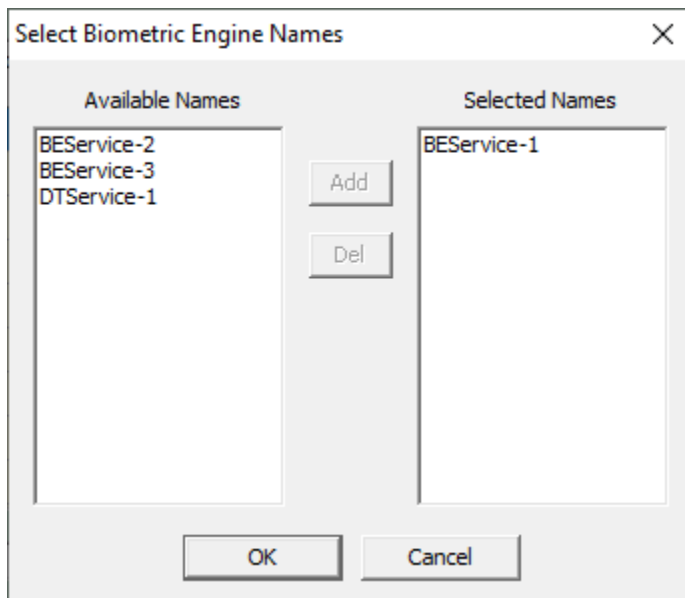
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The example shows that Julia Zamora's enrollment record will be sent to the Biometric Engine whose name is BEService-2 and John Smith's enrollment record will be sent to two Biometric Engines whose names are BEService-1 and BEService-3. If you add a name then the record will be added to that Biometric Engine during the next synch. If you delete a name, then the record will be deleted from that Biometric Engine during the next synch.

You can edit this column in the same way as the other columns by simply typing the desired value and pressing **Enter**. However, you can also use the 'Select Names' dialog by right-clicking the cell once it's in edit mode (see the **Adding Records** section for more information on editing a row).



Click on the 'Select Names' menu item to open the dialog.



The left pane shows the list of names that can be added to the 'Selected Names'.

The right pane shows the list of names that will be used to set the column's new value.

The **Add** button moves selected Names from the left pane to the right pane.

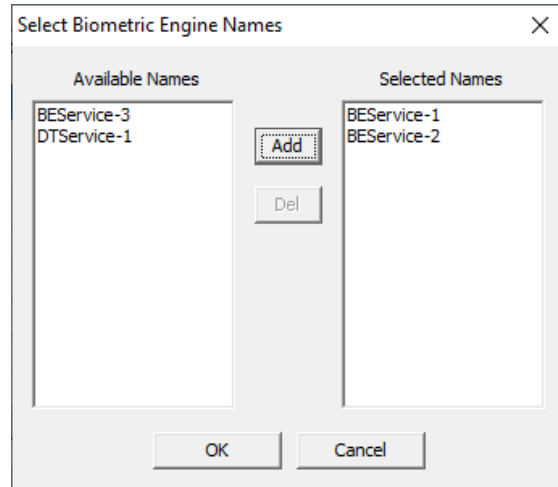
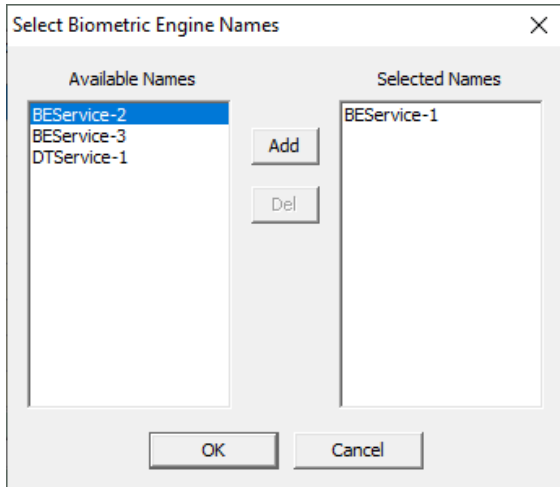
The **Del** button moves selected Names from the right pane to the left pane.

Double-clicking a Name in a pane moves it to the other pane.

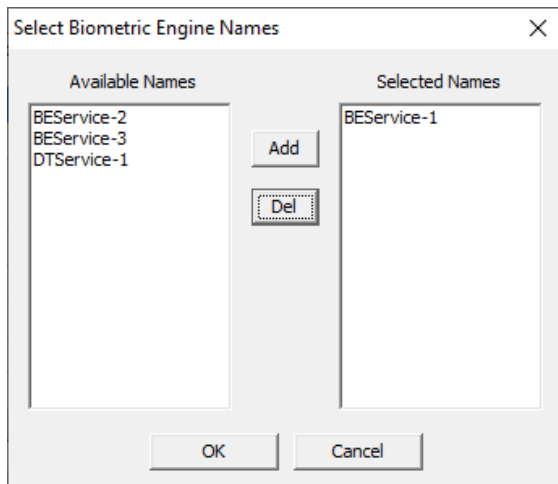
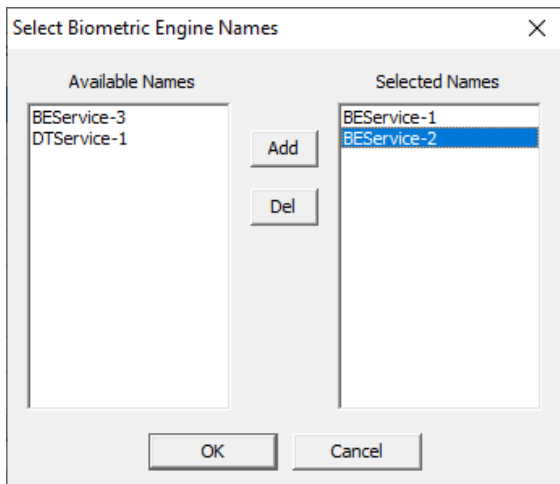
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Clicking on **OK** will replace the cell's value with the list of names in the 'Selected Names' pane and clicking on **Cancel** will leave the cell's existing value in place.

Here's how an add would look: select item and click on **Add**.



Here's how a delete would look: select an item click on **Delete**.



Here's how the grid would look after adding a name and clicking **OK**.

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	E	Last	First	Middle	ID	Level One	Level Two	Opt-out	Inactive	Inactive Date	Biometric Engine Names
1	🔴	Aguirre	Melanie		10174	East Lake ES	01				BEService-1, BEService-4
2	🔴	Aldeguer	Kailyn		10971	East Lake ES	01				BEService-1
3	🔴	Anaya	Byrionna		10992	East Lake ES	01				BEService-1
4	🔴	Bowman	Byron		10947	East Lake ES	01				BEService-1
5	🔴	Brockington	Adrian		10949	East Lake ES	01				BEService-1
6	🔴	Brockington	D'Aarin		10993	East Lake ES	01				BEService-1
7	🔴	Cardenas	Romello		10788	East Lake ES	01				BEService-1
8	🔴	Cleaves	Briana		10204	East Lake ES	01				BEService-1
9	🔴	Cleaves	Nigel		10175	East Lake ES	01				BEService-1

Managing the Columns

When the Enrollment Manager opens you will see all of the available column headings. However, you can manipulate them in a couple of ways to better review your data. You can resize them manually, resize them to fit the data, resize them as a group and use them to sort the grid. NOTE: If you have used the Windows Scaling and Layout settings to change the scale to a value larger than 100%, then the column sizing may be affected.

- To resize the column manually - hover the mouse over a column separator until the mouse changes to a double headed arrow (↔). Now, hold down the left mouse button and drag left or right to make the column smaller or larger.
- To resize the column to fit the data - hover the mouse over a column separator until the mouse changes to a double headed arrow (↔). Now, double-click the left mouse button to resize.
- To sort the grid by a single column – click the cell containing the column heading. In this example the **First** column was clicked. The icon in the heading indicates that the sort is ascending. Clicking **First** again would change the sort to descending.

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Enrollment Manager - Biometric Engine

File Data Selection Data Management User Management EOY Management Service Management Help

	E	Last	First	Middle	ID	Level One	Level Two	Opt-out	Inactive	Inactive Date
413	😊	Straughn	Aaron		10736	East Lake ES	05			
262	😊	Case	Aaron		12106	East Lake ES	04			
110	😊	Duran	Aayden		10832	East Lake ES	02			
98	😊	Benitez-Alv...	Abel		10823	East Lake ES	02			
344	😞	Anyaeji	Abigail		10927	East Lake ES	05			
406	😊	Salazar	Ada		11176	East Lake ES	05			
345	😊	Aquirre	Adolfo		10953	East Lake ES	05			
310	😊	Samorano	Adrian		10926	East Lake ES	04			
30	😞	Hermosillo	Adrian		10182	East Lake ES	01			

Connected

Filter: OFF

Enroll Verify Add Delete Save Cancel Exit

Enrollment Manager - Biometric Engine

File Data Selection Data Management User Management EOY Management Service Management Help

	E	Last	First	Middle	ID	Level One	Level Two	Opt-out	Inactive	Inactive Date
234	😊	Romero	Zurius		10884	East Lake ES	03			
18	😞	Fischer	Zayden		11178	East Lake ES	01			
124	😊	Granillo-Cruz	Zane		10886	East Lake ES	02			
417	😊	Valenzuela	Zak		10776	East Lake ES	05			
211	😊	Guebara	Zachary		10534	East Lake ES	03			
284	😊	Moreno	Zabrina		10158	East Lake ES	04			
134	😞	Lawrence	Yean Carlos		10860	East Lake ES	02			
56	😞	Reyes	Yareli		11225	East Lake ES	01			
268	😊	Hoyer	Windy		12124	East Lake ES	04			

Connected

Filter: OFF

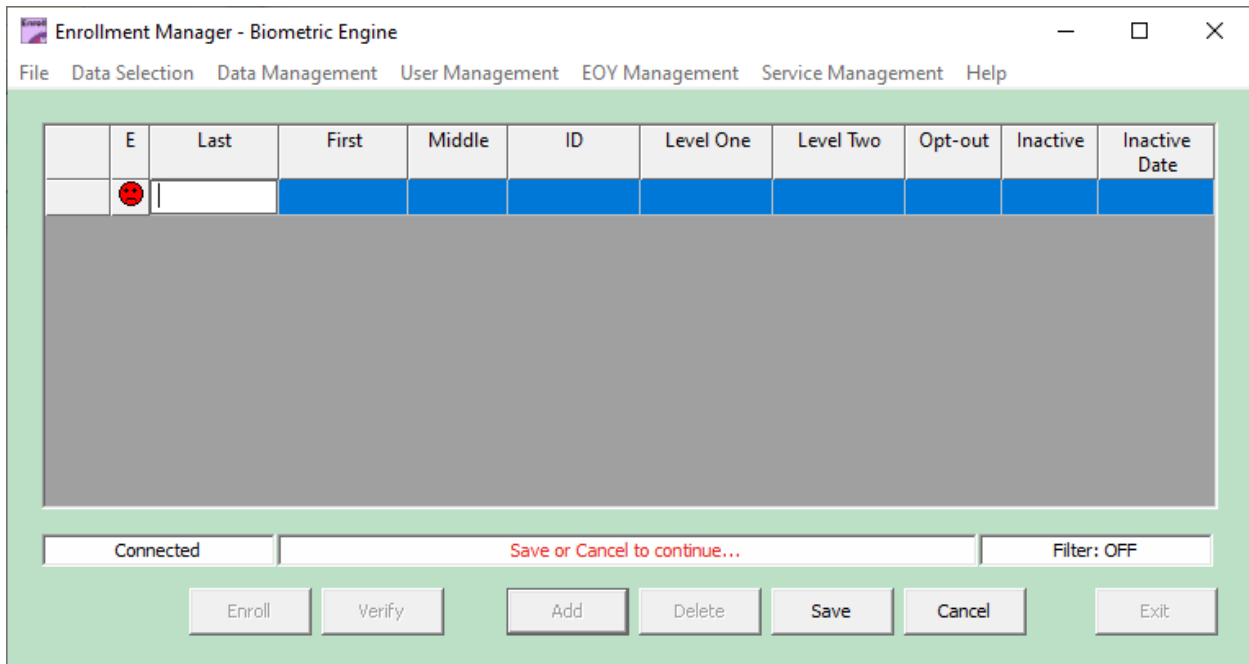
Enroll Verify Add Delete Save Cancel Exit

Adding Records

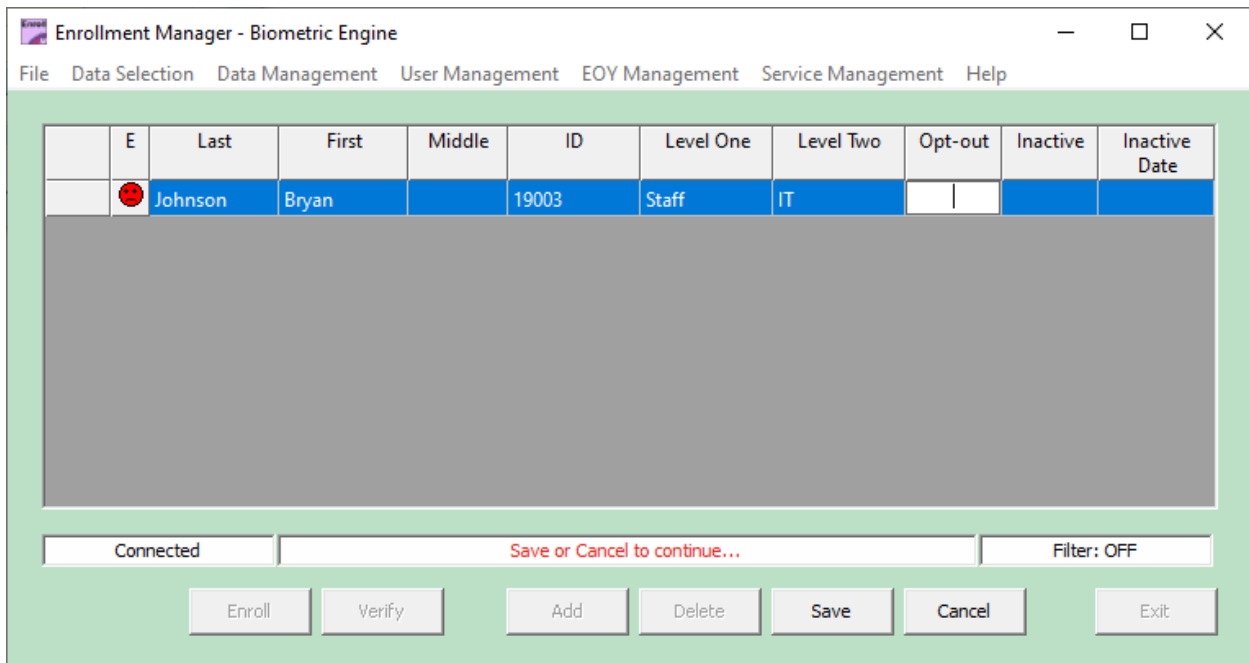
This functionality is only available when connected to a Biometric Engine or Distributor, when **Edit Mode** includes *Manual or Edit* and when the user's role is not Enroller.

To add a record, click on the **Add** button. A row will be added to the grid, the cursor will be placed in the first column and the cell put into edit mode.

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In edit mode, you can type any character or use any of the standard editing keys to enter a value. Use the **Enter** key to exit edit mode and save your change or use the **Esc** key to exit edit mode and ignore your changes. The **Tab** key moves the focus to the next column and the **Shift-Tab** key combo moves the focus to the previous column. Whether you're in edit mode or not, the **Tab** key will change the focus and stay in the same mode. The arrow keys, on the other hand work differently for each mode. In edit mode they move to the next and previous character and in navigation mode they move to the next and previous columns.

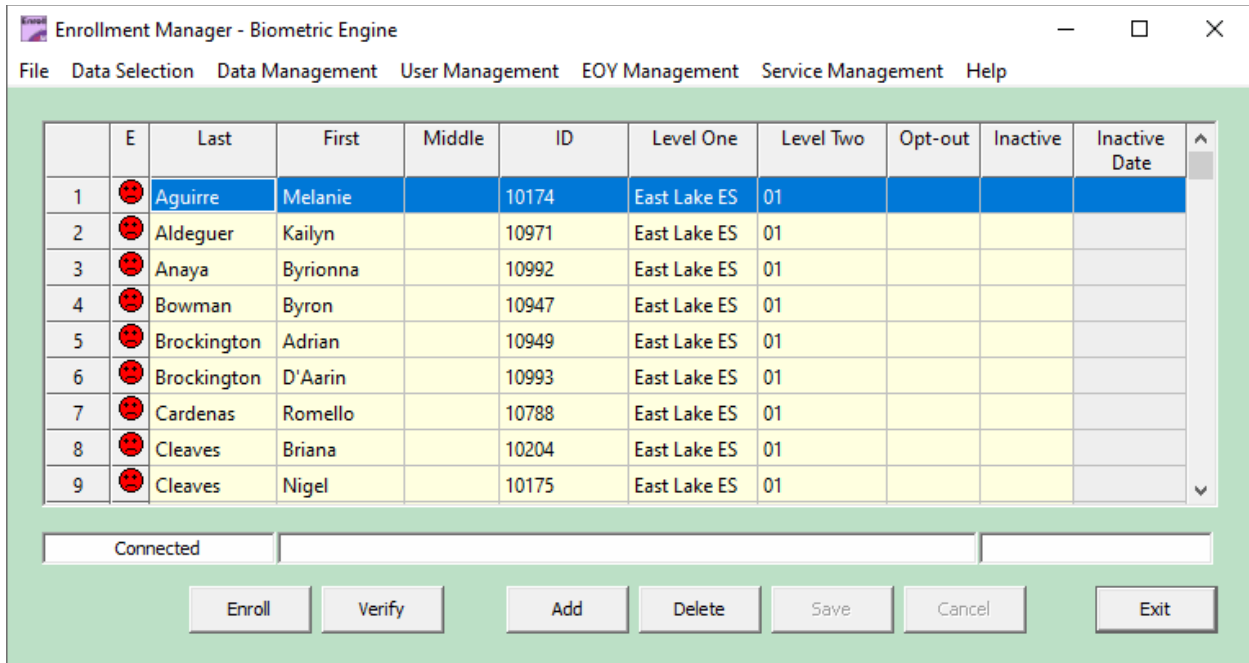


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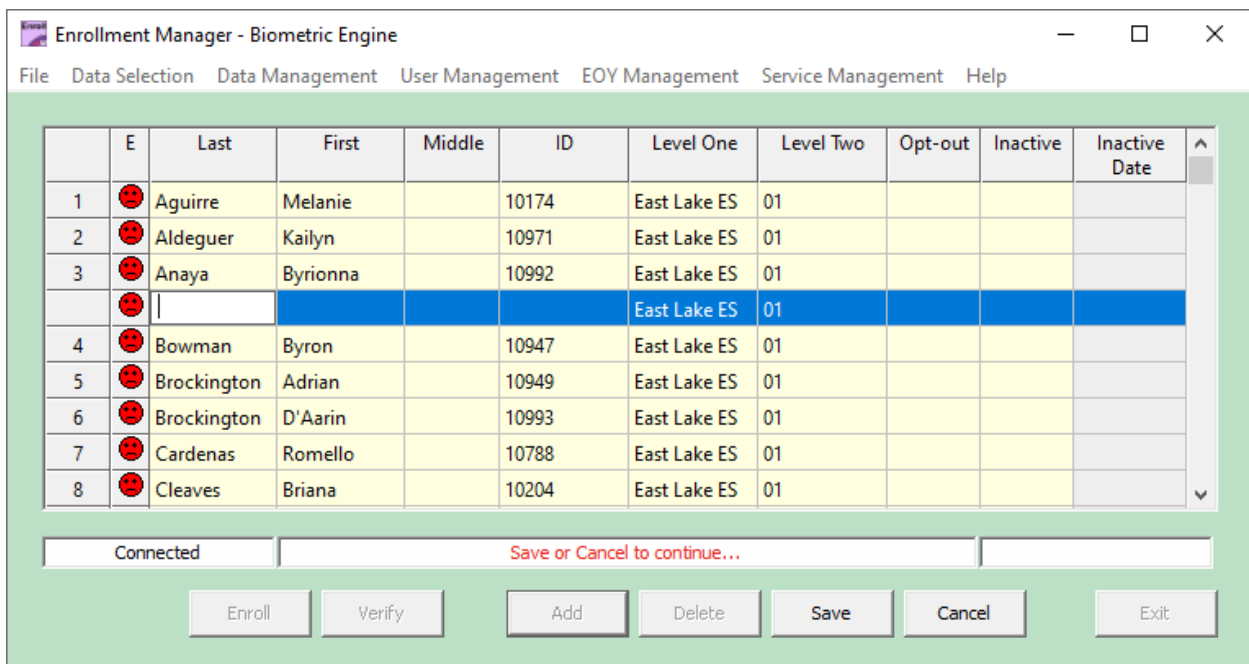
Now click on **Save** to save this record or click on **Cancel** to ignore your edits and remove the new row.

NOTE: Once a row has been edited you must either save or cancel your changes in order to navigate to other rows.

After adding some records here is how the grid might look.

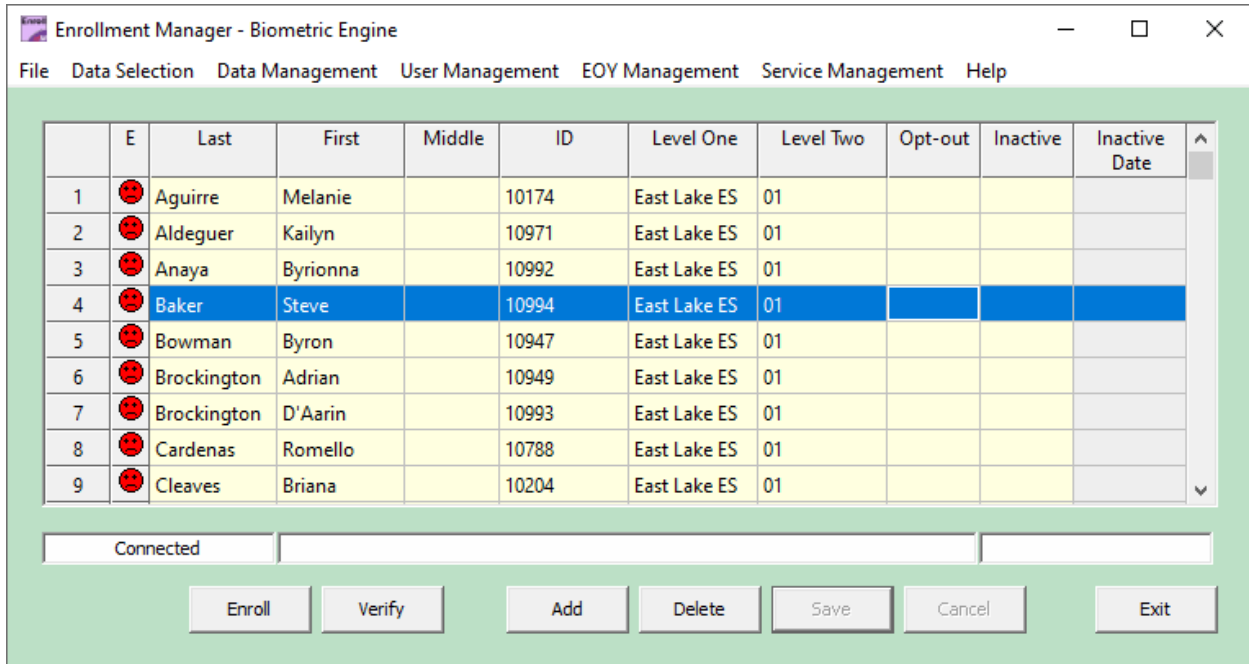


If we wanted to add Steve Baker in alphabetical order by last name, you would use the **Down Arrow** key to navigate to row 3 and click on **Add**.



Enter the information, click on **Save** and the record is added.

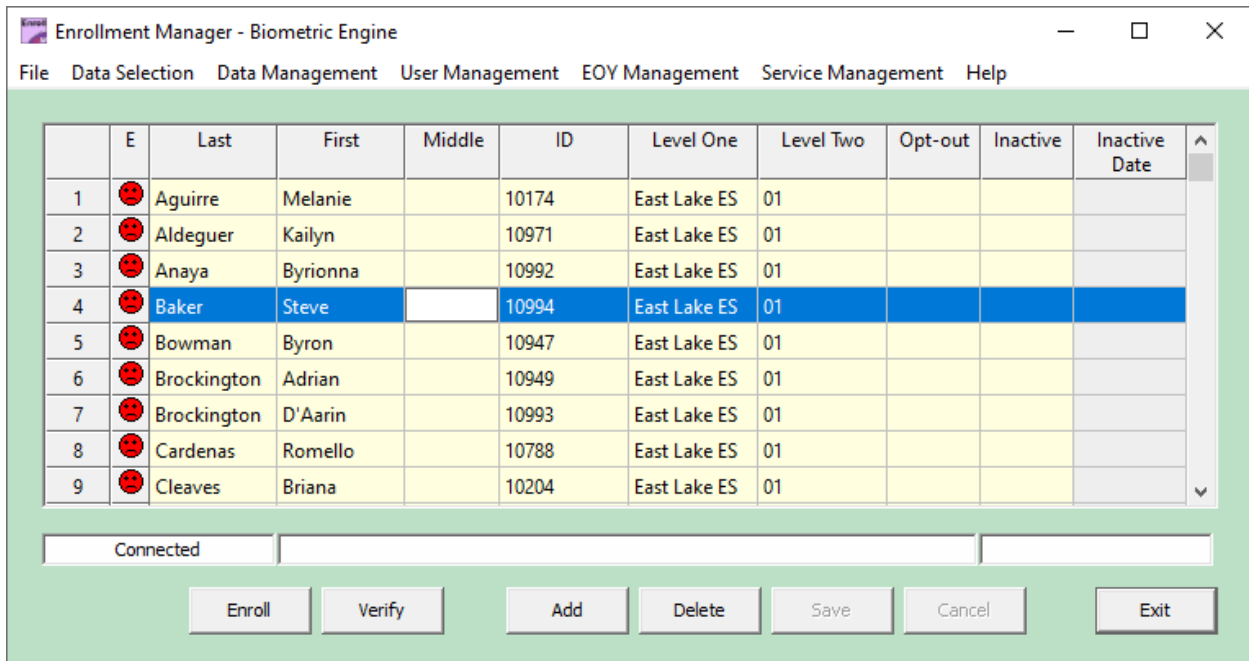
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Modifying Records

This functionality is only available when connected to a Biometric Engine or Distributor, when **Edit Mode** includes *Manual or Edit* and when the user's role is not Enroller.

To modify a record we're going to navigate to the row we want to change.



Then place the focus on the column that you want to change (the Middle column in this picture) and press **Enter** or just start typing (see the **Adding Records** section for more information about the editing and navigation keys). Once you have completed your changes, click on **Save** or click on **Cancel** to discard them.

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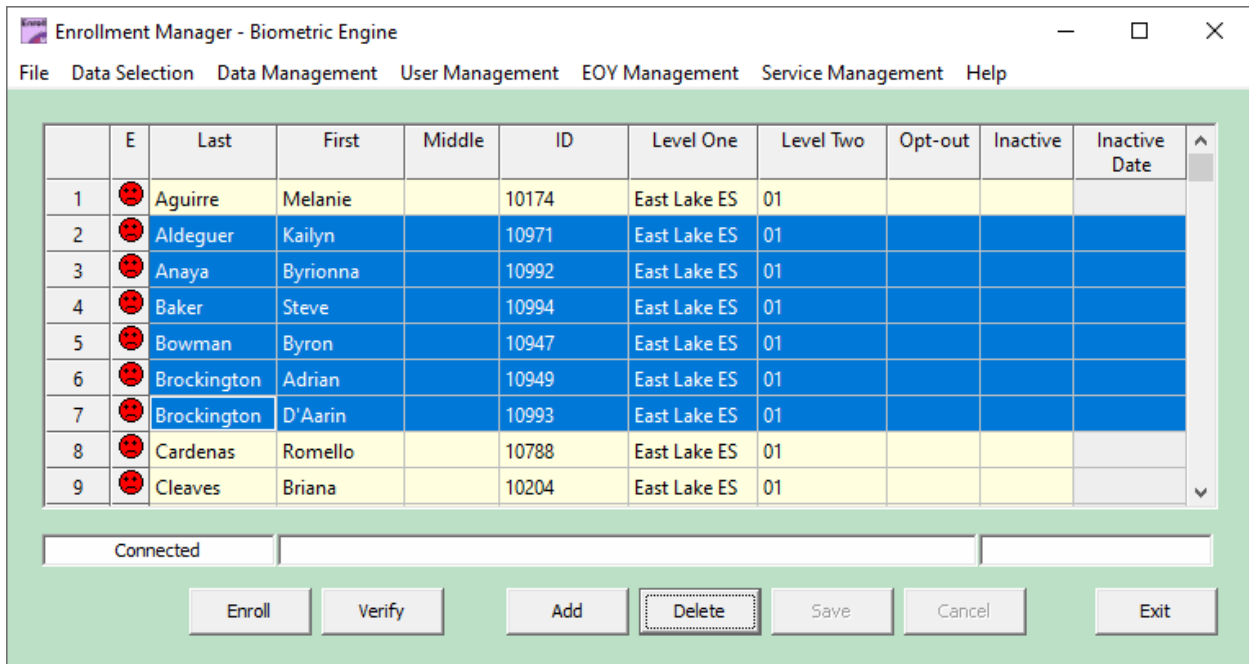
NOTE: Once a row has been edited you must either save or cancel your changes in order to navigate to other rows.

Deleting Records

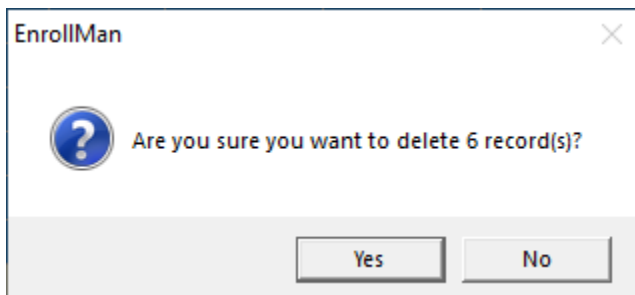
This functionality is only available when connected to a Biometric Engine or Distributor, when **Edit Mode** includes *Manual or Edit* and when the user's role is not Enroller.

You can delete one or more records at a time by selecting the records you want and then clicking the **Delete** button. The enrollment grid uses the standard multi-select keys that Windows uses. You can: click on the first row you want to delete and then use the **Shift-Down Arrow** or **Shift-Page Down** key combo to select as many rows as you want to delete; click on the last row and use the **Shift-Up Arrow** or **Shift-Page Up** key combo to select your rows, or you can click on a row and drag the mouse up or down to create your selection.

Here's an example of where 6 rows are selected.



Now, click on the **Delete** button and you will be presented with a confirmation message box.



Click on **Yes** to complete the delete or **No** to cancel it.

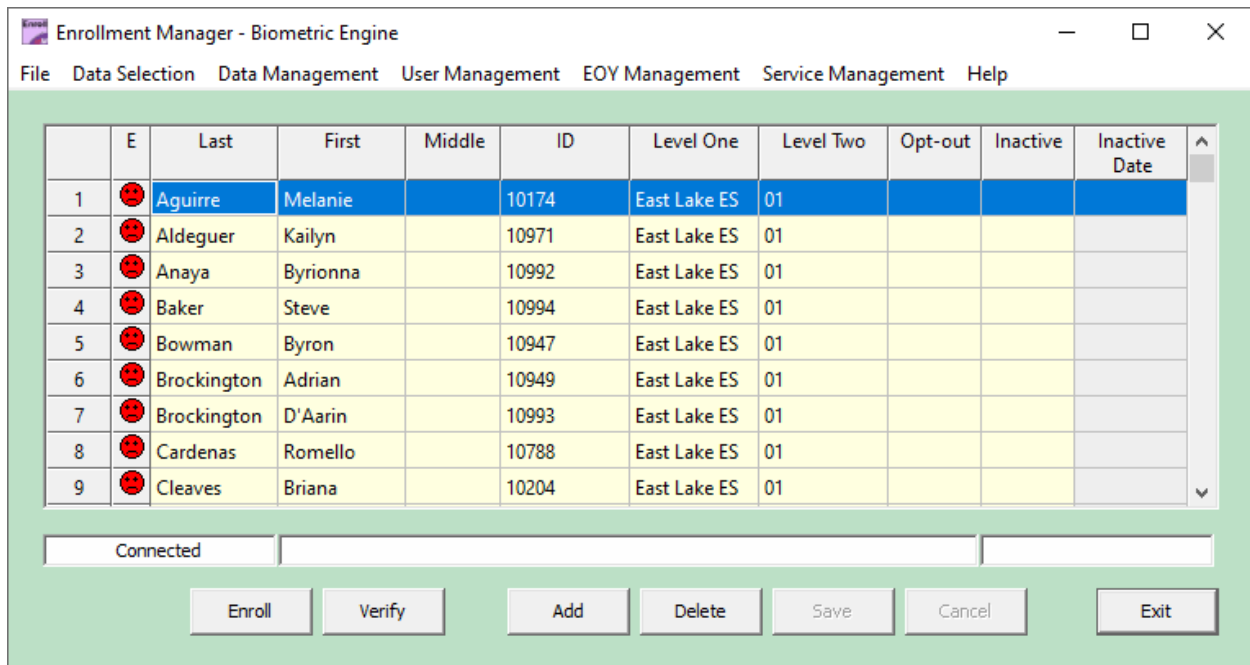
Enrollment Manager Guide

Enrolling

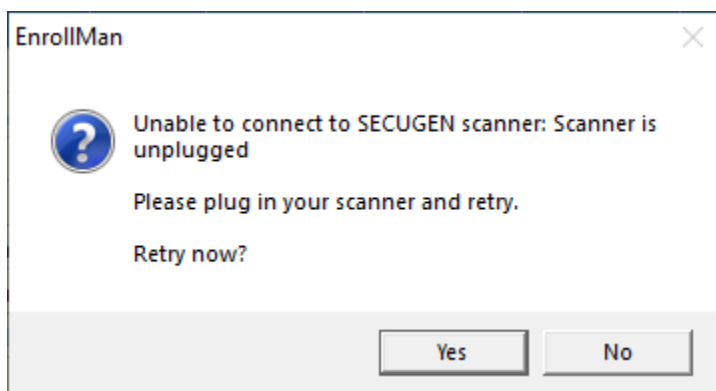
This functionality is only available when connected to a Biometric Engine or Distributor, and when **Edit Mode** includes *Enroll*.

Enrolling is the process of creating a biometric template and assigning it to a person in the database. The recommended process involves making three placements with the right index finger and three placements with the left index finger. Use of the index finger is not required but it is the easiest to place.

After adding or importing some records, the (E)nrolled column will display the 🚫 icon which indicates that the record is NOT enrolled as shown here.

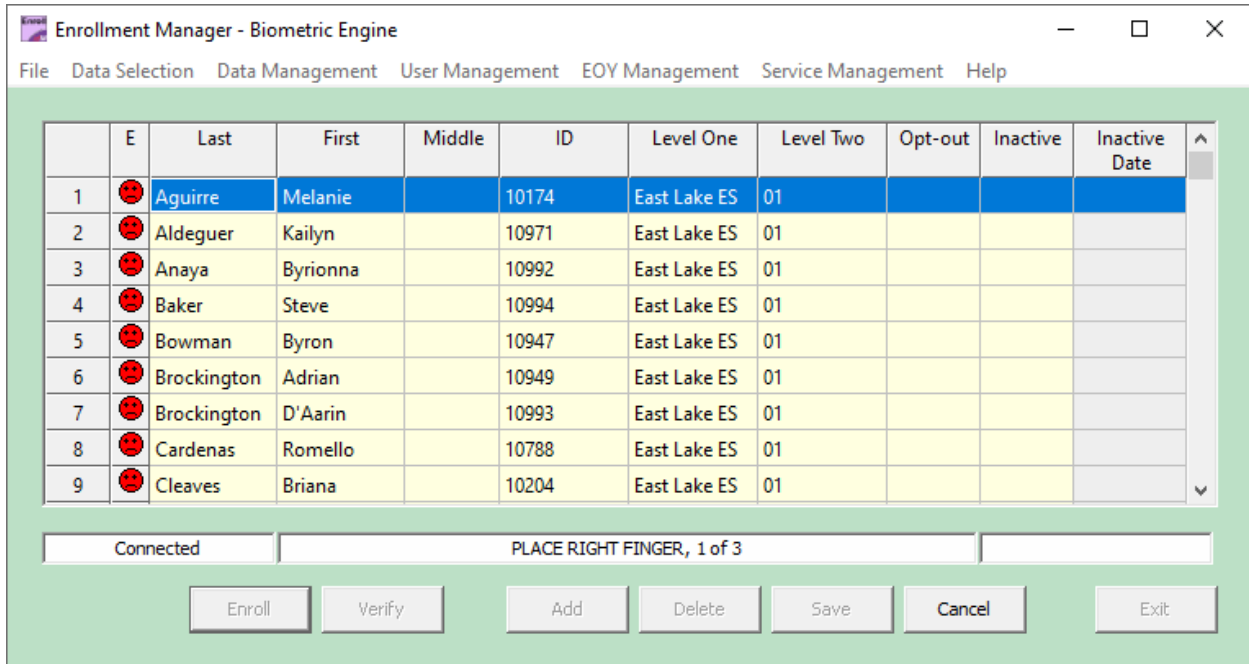


Select the record that you wish to enroll and click the **Enroll** button. The Enrollment Manager will not try to connect to your scanner. If your scanner is not plugged in then you'll see the following message.

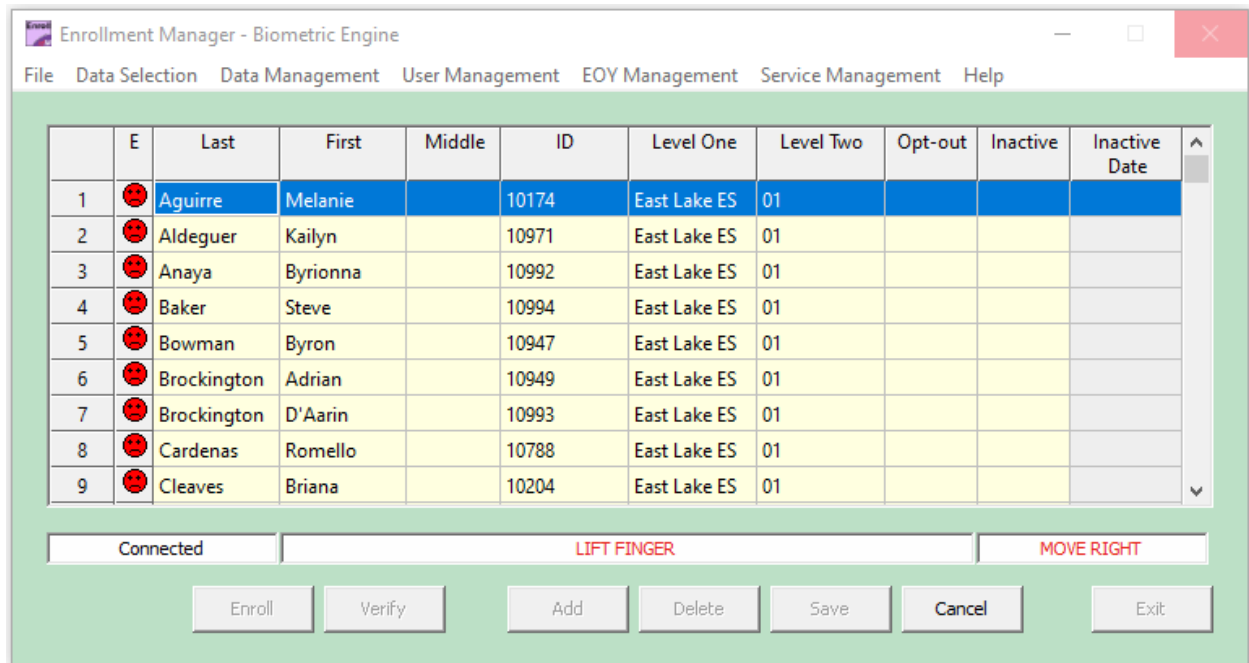


Plug your scanner in and click **Yes** to retry. If you don't have a scanner or if you wish cancel the enrollment, click on **No**. Once the scanner is connected, the center status box will prompt the person to place their finger as shown here.

Enrollment Manager Guide

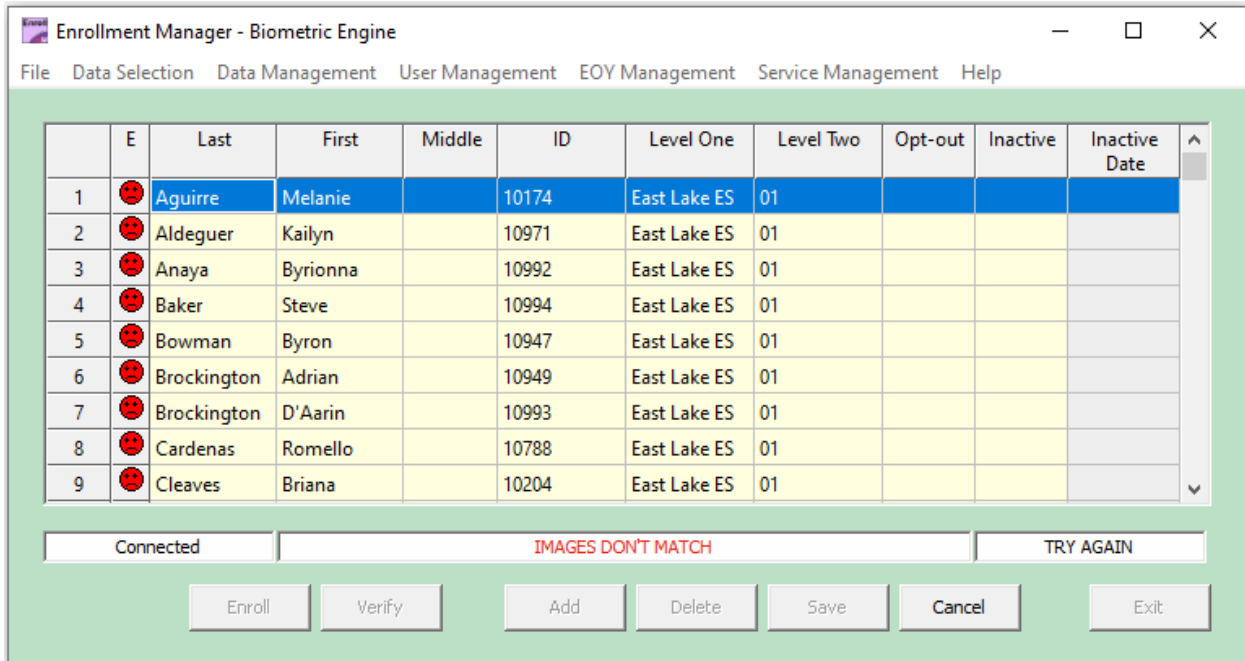


After three placements with your right finger, you will be prompted to place your left finger for three placements. If your placement is off a little bit, you may see a message (MOVE FORWARD, MOVE BACK, PLACE FLAT, etc.) in the status box instructing you to lift the finger and place again with a hint as to how to correct it.



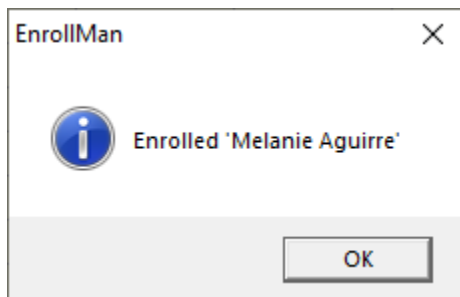
If you have a Traffic Light device plugged in, you will see the Yellow light come on to indicate you have an invalid placement. After three placements, they will be checked for quality and will be matched against each other to make sure they are all the same finger. If the placements were poor or more than one finger was used, you will see the 'IMAGES DO NOT MATCH!' error.

Enrollment Manager Guide



If you're using the Traffic Light it will turn on the Red light.

Once you have completed the placements successfully, the Green light will be turned on and you will get a message indicating that the enrollment was successful.



Click on OK and you'll see the icon change to 🟢 indicating the person is enrolled.

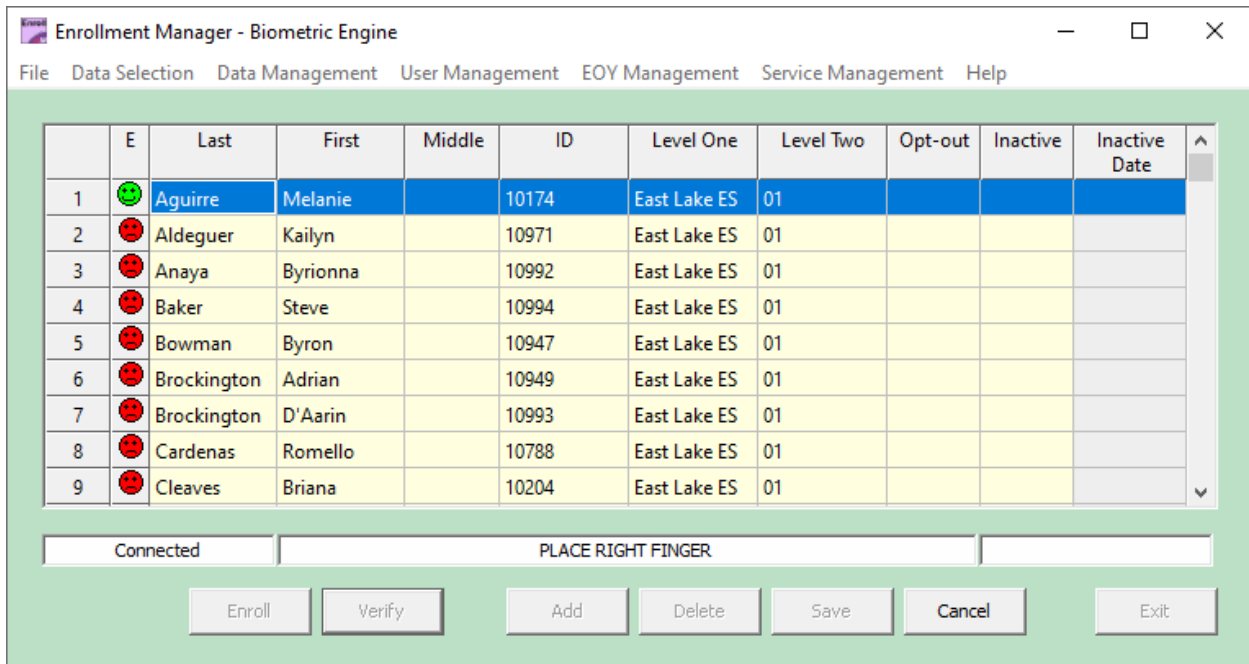
Verifying

This functionality is only available when connected to a Biometric Engine or Distributor, and when **Edit Mode** includes *Enroll*.

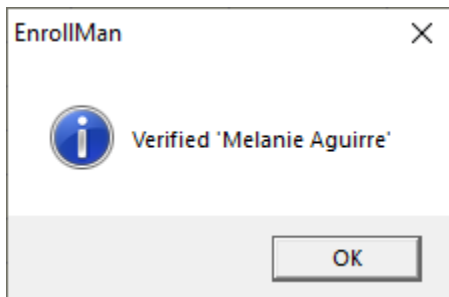
Verifying is the process of scanning both enrollment fingers and comparing it to the selected persons template to “verify” that they match. You can use this function to check the quality of the person’s enrollment. A high quality enrollment is key to insure good identifications.

Select the person you wish to verify and click the **Verify** button. The selected person must already be enrolled. If they are not, you will get a warning message. The status box will prompt you to place your right finger.

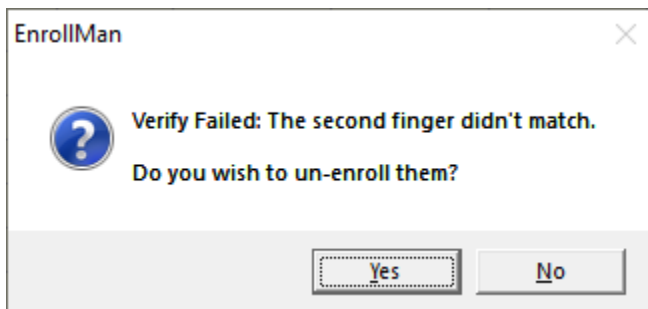
Enrollment Manager Guide



You will then be prompted to place your left finger. If the fingers match with the selected person's template, then the following message will be displayed.



If one of the fingers doesn't match with the selected person's template, then a message similar to this will be displayed.



Click on **Yes** to un-enroll the record allowing you to enroll the person again. Click on **No** to leave the enrollment alone in case you want to try the verification again.

Enrollment Manager Guide

Multi-Enrollment Manager Edits

If you have more than one Enrollment Manager connected to the same service, it is possible to make changes to the same record at the same time. In general, you should avoid editing the same records at the same time, but if you do have more than one Enrollment Manager open, it is recommended that you do a data refresh prior to making changes.

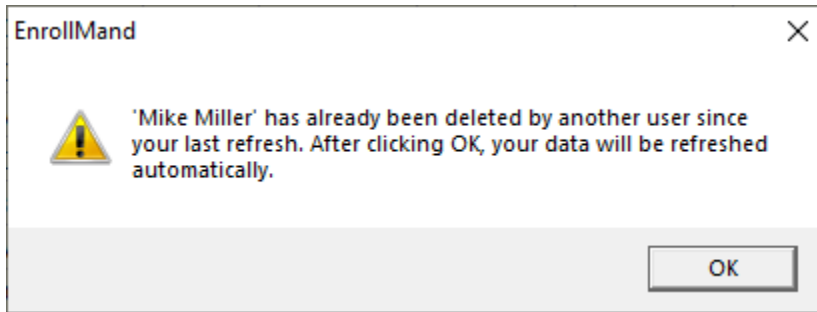
If you do make simultaneous changes, then the result in most cases will be the last change made will be one that is saved. However, there are special situations. Here is a table that outlines the different situations and the result.

	Change on EM 1	Change on EM 2	Result
1	Modified Text	Modified Text	Text from Change 2 saved
2	Add Record	Add Record	'Added since last refresh' error, EM does a refresh, Change 1 saved
3	Delete Record	Delete Record	'Deleted since last refresh' error, EM does a refresh, Change 1 saved
4	Enroll Record	Enroll Record	'Enrolled since last refresh' error, EM does a refresh, Change 1 saved
5	Enroll Record	Enroll same person to a Different Record	'Finger matched' error but matched person will NOT appear enrolled until a refresh
6	Unenroll Record	Unenroll Record	'Unenrolled since last refresh' error, EM does a refresh, Change 1 saved
7	Modified Text	Delete Record	The record is deleted
8	Delete Record	Modified Text	'Deleted since last refresh' error, EM does a refresh, Change 1 saved
9	Modified Text	Enroll Record	Text from Change 1 AND enroll
10	Enroll Record	Modified Text	Text from Change 2 AND enroll
11	Modified Text	Unenroll Record	Text from Change 1 AND unenroll
12	Unenroll Record	Modified Text	Text from Change 2 AND unenroll
13	Delete Record	Enroll Record	'Deleted since last refresh' error, EM does a refresh, Change 1 saved
14	Enroll Record	Delete Record	The record is deleted.
15	Delete Record	Unenroll Record	'Deleted since last refresh' error, EM does a refresh, Change 1 saved
16	Unenroll Record	Delete Record	The record is deleted

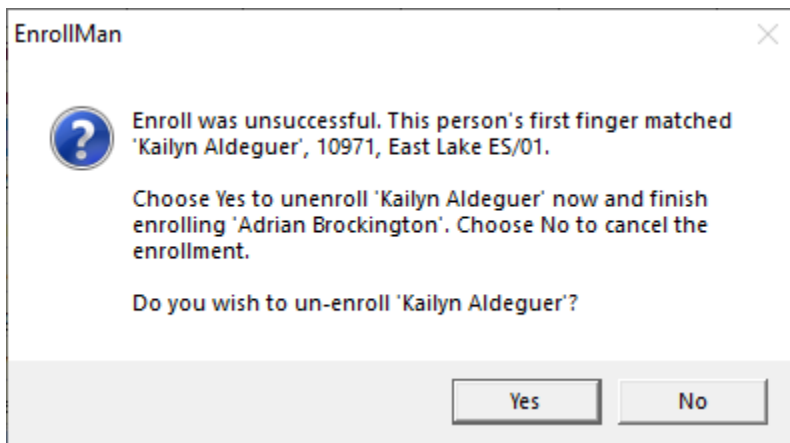
Here are examples of the error messages mentioned in the Result column along with the row they are associated with.

Enrollment Manager Guide

For situations #2, #3, #4, #6, #8, #13 and #15, the Enrollment grid will do a refresh for you automatically. For the other situations, you will need to do a refresh yourself so that you can see the latest changes.



#5



Menu Items

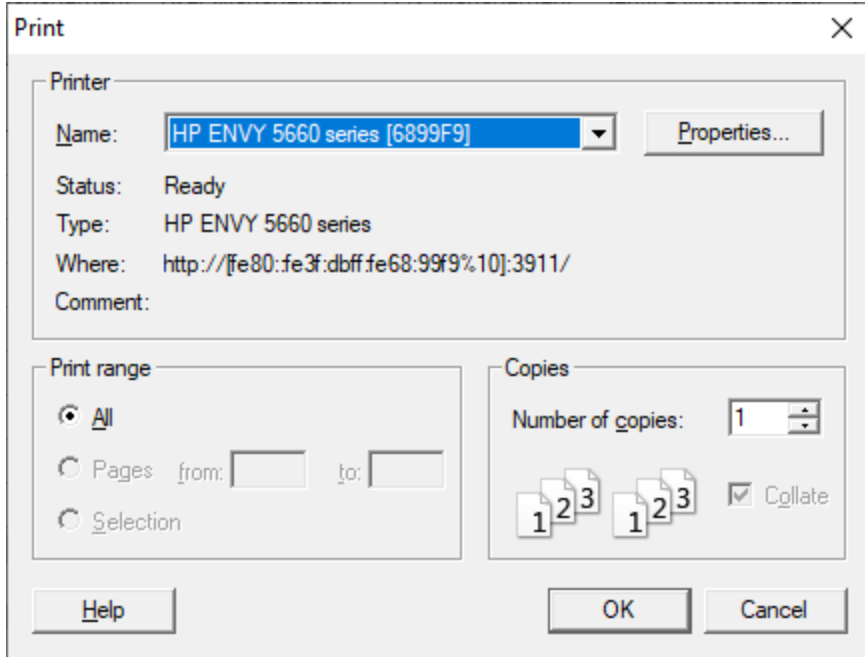
The menu provides access to the many functions available for managing data, users and the service. A menu item may not be available to you depending on your user role. See the **User Management | User Profiles...** section for a description of the different roles.

The following sub-sections provide detailed information on using the functions available through the menu.

File | Print...

The Print function prints the grid as it appears on the screen. Use the **Data Selection | Filter** function to select the records you want and the **Data Selection | Sort** function to put them in the order you want. When you're ready, choose Print... from the menu to view the Print dialog.

Enrollment Manager Guide



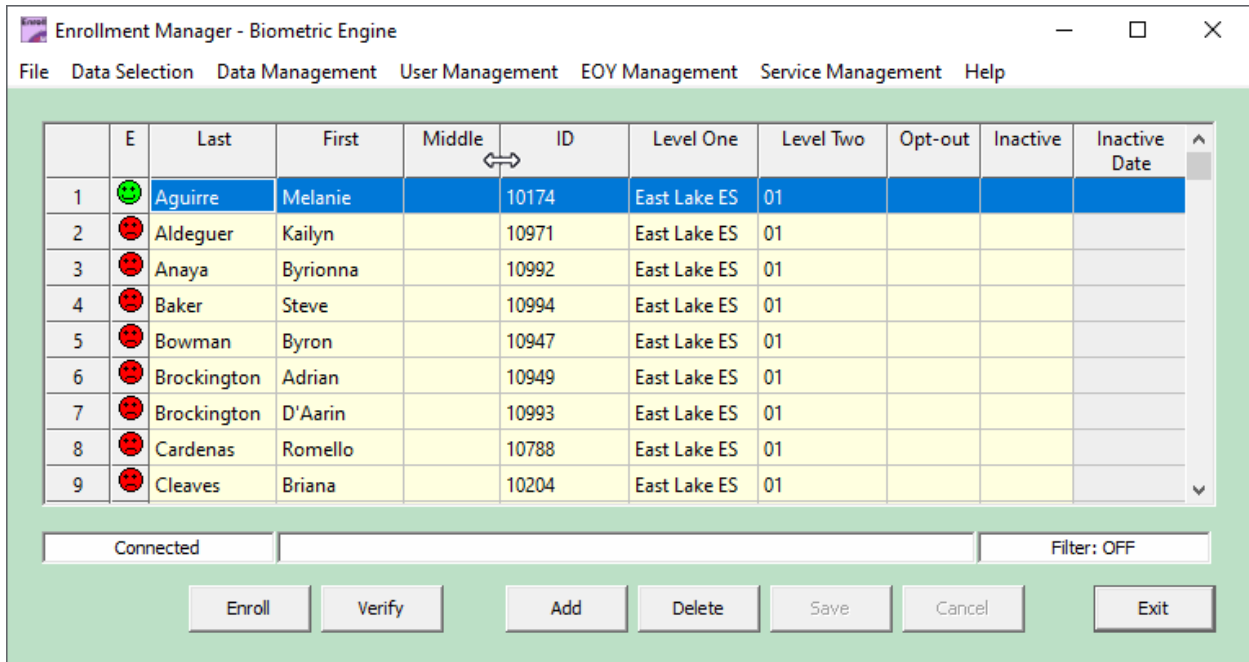
Set the number of copies if necessary and click on **OK** to print.

Here is an example of how the print would look with some sample data using the standard columns and sort.

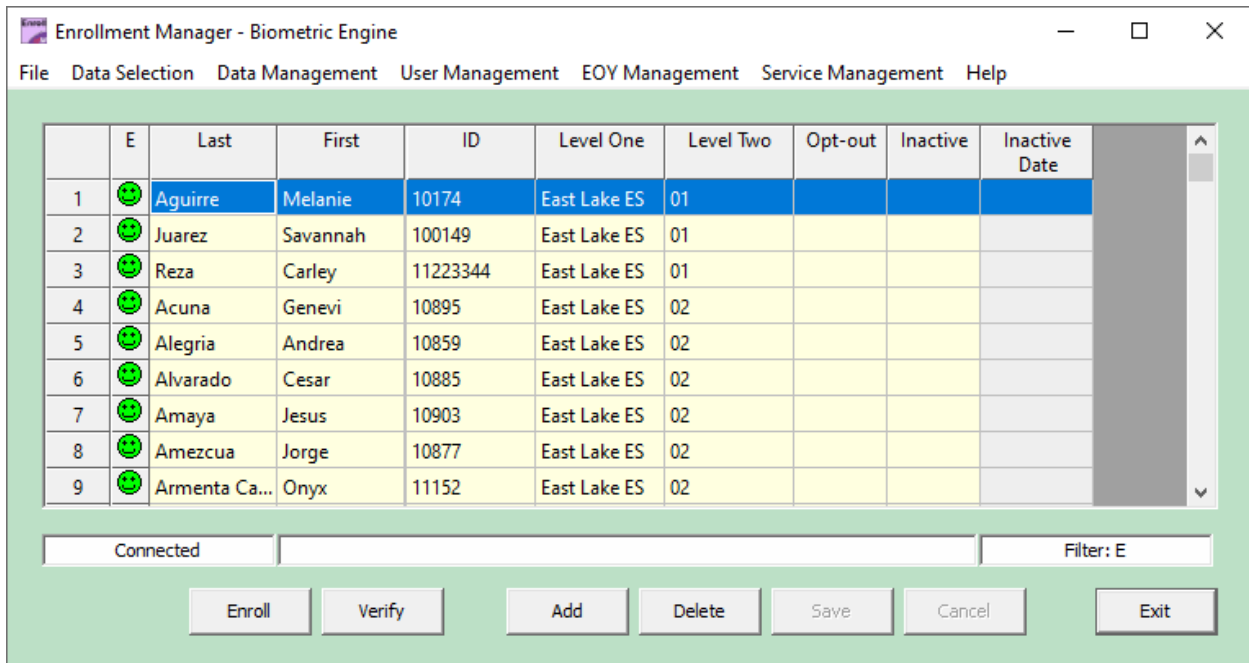
	E	Last	First	Middle	ID	Level One	Level Two	Opt-out	Inactive	Inactive Date
1	😊	Aguirre	Melanie		10174	East Lake ES	01			
2	😊	Juarez	Savannah		100149	East Lake ES	01			
3	😊	Reza	Carley		11223344	East Lake ES	01			
4	😊	Acuna	Genevi		10895	East Lake ES	02			
5	😊	Alegria	Andrea		10859	East Lake ES	02			
6	😊	Alvarado	Cesar		10885	East Lake ES	02			
7	😊	Amaya	Jesus		10903	East Lake ES	02			
8	😊	Amezcuca	Jorge		10877	East Lake ES	02			
9	😊	Armenta Car...	Onyx		11152	East Lake ES	02			
10	😊	Arredondo	Khloe		10848	East Lake ES	02			

You can also hide a column if you don't want it to be printed. Put the cursor on the column divider to the right of the column you wish to hide.

Enrollment Manager Guide



Then drag it to the left until the column is no longer visible.



After clicking on the ID column to sort by ID and printing, here is an example of the output.

Enrollment Manager Guide

Enrollment Manager - Biometric Engine

	E	Last	First	ID	Level One	Level Two	Opt-out	Inactive	Inactive Date
1	😊	Aguirre	Melanie	10174	East Lake ES	01			
2	😊	Juarez	Savannah	100149	East Lake ES	01			
3	😊	Reza	Carley	11223344	East Lake ES	01			
4	😊	Acuna	Genevi	10895	East Lake ES	02			
5	😊	Alegria	Andrea	10859	East Lake ES	02			
6	😊	Alvarado	Cesar	10885	East Lake ES	02			
7	😊	Amaya	Jesus	10903	East Lake ES	02			
8	😊	Amezcuea	Jorge	10877	East Lake ES	02			
9	😊	Armenta Car...	Onyx	11152	East Lake ES	02			
10	😊	Arredondo	Khloe	10848	East Lake ES	02			

You can unhide the column by clicking on column divider where the column started and drag it to the right.

Enrollment Manager - Biometric Engine

File Data Selection Data Management User Management EOY Management Service Management Help

	E	Last	First	ID	Level One	Level Two	Opt-out	Inactive	Inactive Date
1	😊	Aguirre	Melanie	10174	East Lake ES	01			
2	😞	Aldeguer	Kailyn	10971	East Lake ES	01			
3	😞	Anaya	Byrionna	10992	East Lake ES	01			
4	😞	Baker	Steve	10994	East Lake ES	01			
5	😞	Bowman	Byron	10947	East Lake ES	01			
6	😞	Brockington	Adrian	10949	East Lake ES	01			
7	😞	Brockington	D'Aarin	10993	East Lake ES	01			
8	😞	Cardenas	Romello	10788	East Lake ES	01			
9	😞	Cleaves	Briana	10204	East Lake ES	01			

Connected Filter: OFF

Enroll Verify Add Delete Save Cancel Exit

If you log out and then login or exit and restart, the columns will be returned to their defaults.

File / Preferences

There are a small number of common preferences that can be changed while the Enrollment Manager is open. Here is the dialog and a description of the each of them.

Enrollment Manager Guide

The screenshot shows the 'Preferences' dialog box for the Enrollment Manager. It contains the following fields and options:

- Manager:** Location: EM-1
- Window:** Background: GREEN
- Scanner:** Type: SECUGEN, Address: . . .
- Default Layouts:** Import: Last, First, Middle, ID, Level-1, Level-2; Export: Last, First, Middle, ID, Level-1, Level-2

Buttons: Cancel, Save

Enrollment Manager

- **Location** – Specifies the name of the location. It's initially set to "EM-1". While it's not required to change the name, it is a best practice to make this name unique.

Scanner

- **Type** – Specifies the type of scanner that will be used. Can be set to SECUGEN, FUTRONIC or FTR-ETHERNET using the drop-down. The Secugen and Futronic scanners are USB scanners and are plugged in to the computer running Scan Manager. The Futronic Ethernet Scanner is a stand-alone device with a scanner and a display that connects to the Scan Manager via the network. See the [identiMetrics Ethernet Scanner Guide](#) for information on configuring and using a Futronic Ethernet Scanner.

NOTE: While the Secugen and Futronic scanners are the best scanners for use with the Scan Manager, there is a list of additional scanners that can be used if required. Contact Customer Support if you're interested in using a different scanner.

- **Address** – Species the TCP/IP address of the scanner. This is only available when the **Type** is set to FTR-ETHERNET and is initially empty.

Window


- **Background** – Specifies the color of the background. Can be TAN, GRAY, YELLOW, BLUE, GREEN, BLUE_GREEN or WHITE. It is initially set to GREEN.

Enrollment Manager Guide

Default Layouts

- **Export** – Specifies which fields and in what order those fields will be exported. Initially set to “Last, First, Middle, ID, Level-1, Level-2”.
- **Import** – Specifies which fields and in what order those fields will be imported. Initially set to “Last, First, Middle, ID, Level-1, Level-2”.

File | Exit

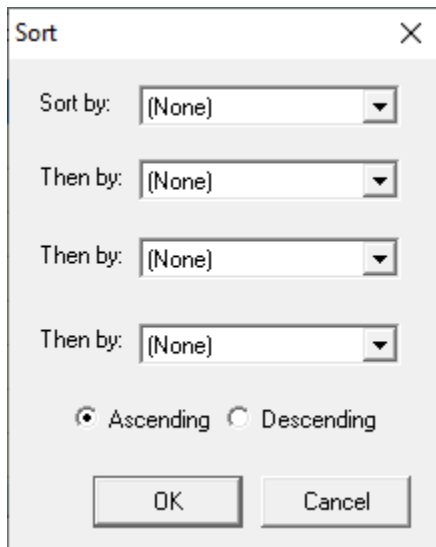
If you open the Enrollment Manager using the Scan Manager menu then the File menu will include the **Exit** item. This operates the same as the Exit button or clicking on the .

File | Logout

If you run the Enrollment Manager directly by using the Enrollment Manager shortcut then the File menu will include the **Logout** item. Clicking on this menu item will logout the current user from the service and display the Login dialog.

Data Selection | Sort...

The Sort function allows you to sort the records in the grid using up to four different fields. It does not affect the database. It just allows you to display or print the enrollment records in custom order. Select **Sort...** from the menu and you'll see the Sort dialog.



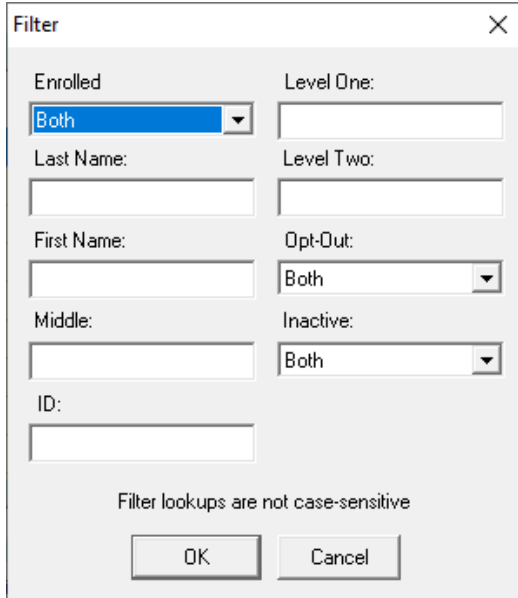
Use the drop-down selection boxes to choose the columns to sort on. Click on the **Ascending** or **Descending** radio buttons to the desired action and click on **OK**. The grid will be sorted accordingly. Clicking on **Cancel** simply closes the dialog.

To return the grid to its default sorting, click on the row number column and sort it in ascending order or use the **Data Selection | Refresh** menu item.

Enrollment Manager Guide

Data Selection | Filter...

The Filter function allows you to limit the enrollment records displayed in the grid by the criteria you provide. Here is the Filter dialog for the Biometric Engine and ID Provider on the left and the Distributor on the right.

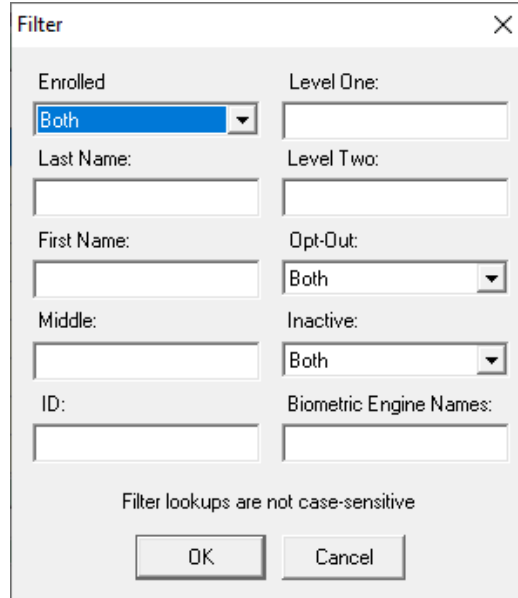


The Filter dialog for the Biometric Engine and ID Provider includes the following fields and controls:

- Enrolled: **Both** (dropdown menu)
- Level One: [Empty text box]
- Last Name: [Empty text box]
- Level Two: [Empty text box]
- First Name: [Empty text box]
- Opt-Out: **Both** (dropdown menu)
- Middle: [Empty text box]
- Inactive: **Both** (dropdown menu)
- ID: [Empty text box]

Filter lookups are not case-sensitive

Buttons: **OK**, **Cancel**



The Filter dialog for the Distributor includes the following fields and controls:

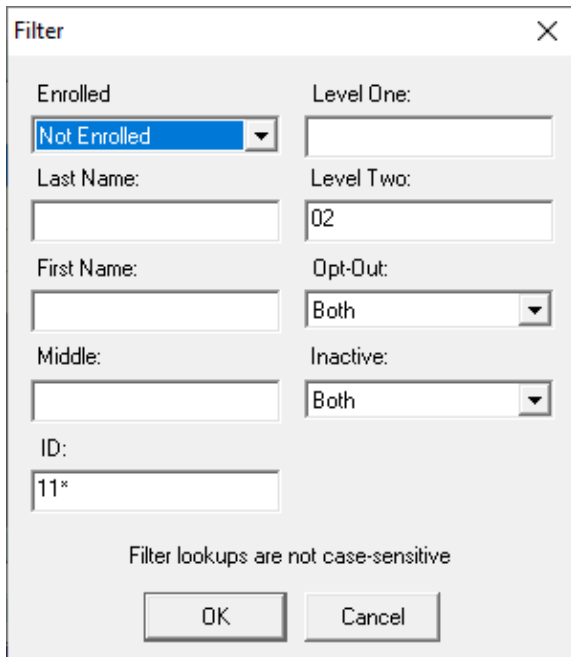
- Enrolled: **Both** (dropdown menu)
- Level One: [Empty text box]
- Last Name: [Empty text box]
- Level Two: [Empty text box]
- First Name: [Empty text box]
- Opt-Out: **Both** (dropdown menu)
- Middle: [Empty text box]
- Inactive: **Both** (dropdown menu)
- ID: [Empty text box]
- Biometric Engine Names: [Empty text box]

Filter lookups are not case-sensitive

Buttons: **OK**, **Cancel**

Enter the criteria you wish to filter on and click on **OK**. This will refresh the grid and only show the records that match. Clicking on **Cancel** closes the dialog with no action.

You can enter the exact text to match or you can use an asterisk (*) to match any characters of zero or more length. For example, "M*n" would match: "Mn", "Man", "Moon", "Melon", etc. You can also use the asterisk at the beginning of the text to look for endings. For example, "*ES" would match: "East Lake ES", "Springside ES" or "Frances".



The Filter dialog is configured with the following criteria:

- Enrolled: **Not Enrolled** (dropdown menu)
- Level One: [Empty text box]
- Last Name: [Empty text box]
- Level Two: **02** (text box)
- First Name: [Empty text box]
- Opt-Out: **Both** (dropdown menu)
- Middle: [Empty text box]
- Inactive: **Both** (dropdown menu)
- ID: **11*** (text box)

Filter lookups are not case-sensitive

Buttons: **OK**, **Cancel**

If you wanted to see all the un-enrolled people in the second grade with ID's that start with '11', here is how the filter form would look.

Enrollment Manager Guide

Here is the grid with the filter applied. Notice in the bottom right status box it shows what the current filter values are.

The screenshot shows the 'Enrollment Manager - Biometric Engine' application window. The menu bar includes 'File', 'Data Selection', 'Data Management', 'User Management', 'EOY Management', 'Service Management', and 'Help'. The main area contains a data grid with the following columns: 'E', 'Last', 'First', 'Middle', 'ID', 'Level One', 'Level Two', 'Opt-out', 'Inactive', and 'Inactive Date'. The first four rows of data are visible, with the first row highlighted in blue. Below the grid, there is a status bar showing 'Connected' and a filter box containing 'Filter: NE, 11*, 02'. At the bottom, there are buttons for 'Enroll', 'Verify', 'Add', 'Delete', 'Save', 'Cancel', and 'Exit'.

	E	Last	First	Middle	ID	Level One	Level Two	Opt-out	Inactive	Inactive Date
1	●	Carrasco	Annalise		11193	East Lake ES	02			
2	●	Heath	Kambria		11221	East Lake ES	02			
3	●	Lyons	Alianna		11220	East Lake ES	02			
4	●	Winchester	Daniel		11211	East Lake ES	02			

Data Selection | Clear Filter

The Clear Filter function simply clears the filter and retrieves the latest version of all the records.

Data Selection | Find...

The Find function searches the grid using the criteria specified starting from the first record in the grid and not from the currently selected record.

The 'Find' dialog box contains the following fields and options:

- Find What: [Text Input Field]
- From Column: [Dropdown Menu, currently set to 'Last']
- To Column: [Dropdown Menu, currently set to 'Inactive Date']
- Match Case:
- Match Whole Word:
- Wrap Search:
- Buttons: Find, Cancel

- **Find What** – the text to search for.
- **From Column** – the left-most column included in the search.
- **To Column** – the right-most column included in the search.
- **Match Case** – determines whether search is case-sensitive or not.

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- **Match Whole Word** – when set will only match the word exactly. For example, if Match Whole Word is NOT checked and searching for “ab”, you would match “able” and “cabot”. If checked, then it would only match “ab” as in “the ab” or “ab, more”.
- **Wrap Search** – if checked, the search will start back at the top once you have reached the last matching record.

With the default settings as shown above, entering text in the **Find What** field and clicking on **Find** would search all columns, would be case-insensitive, would match any part of the data and would continue to the first matching record after finding the last matching record.

If the text is found, the selected row will be moved to the appropriate row and the corresponding column will have focus. If the text is not found, a message will be displayed.

Clicking on **Cancel** closes the dialog with no action.

Data Selection | Find Next

The Find Next function continues the search started by using the Find function. If the text searched for with Find was not found, then the Find Next function will indicate the text was not found as well.

Data Selection | Find and Replace...

This menu item is only available when connected to a Biometric Engine or a Distributor, when **Edit Mode** includes *Manual* or *Edit* and when the user’s role is anything other than Enroller.

The Find and Replace function allows you to make a change to a set of records instead of changing them one at a time. Here is the Find and Replace dialog and a description of the settings.

The screenshot shows a dialog box titled "Find and Replace" with a close button (X) in the top right corner. The dialog contains the following elements:

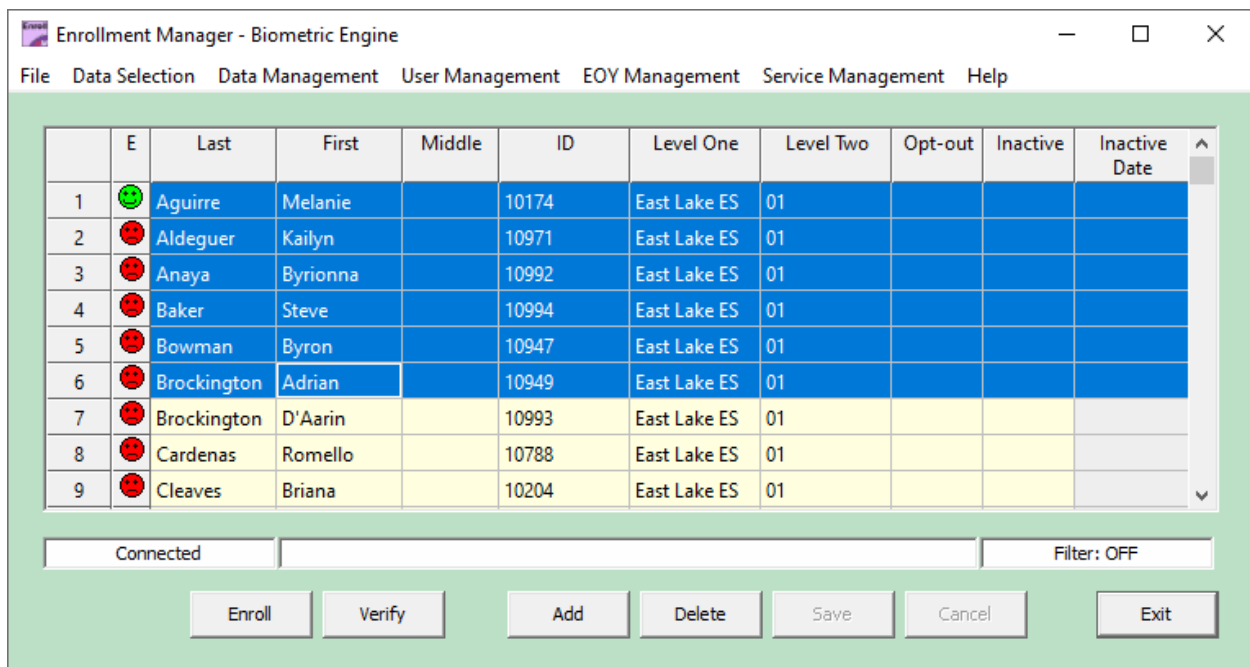
- Find What:** A text input field.
- Replace With:** A text input field.
- Match Case:** A checkbox, currently unchecked.
- Match Whole Word:** A checkbox, currently unchecked.
- Search:** A section containing:
 - From Column:** A dropdown menu with "Last" selected.
 - To Column:** A dropdown menu with "Inactive" selected.
 - Selected Rows:** A radio button, currently unselected.
 - All Rows:** A radio button, currently selected.
- Buttons:** "Replace" and "Cancel" buttons at the bottom.

- **Find What** – the text to search for.
- **Replace With** – the text that will replace the searched text.
- **From Column** – the left-most column included in the search.

Enrollment Manager Guide

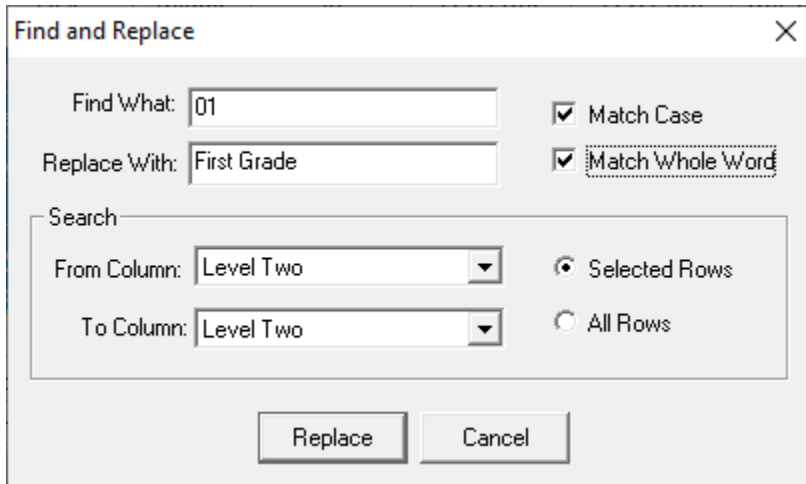
- **To Column** – the right-most column included in the search.
- **Match Case** – determines whether the search is case-sensitive or not.
- **Match Whole Word** – when set will only match the word exactly. For example, if Match Whole Word is NOT checked and searching for “ab”, you would match “able” and “cabot”. If checked, then it would only match “ab” as in “the ab” or “ab, more”.
- **Selected Rows** – searches only the selected rows. Only one of the row choices can be selected at a time.
- **All Rows** – searches all rows in the grid no matter what the selection is. Only one of the row choices can be selected at a time.

To use the Find and Replace function on a selection, you must select one or more rows and then select **Data Selection | Find and Replace** from the menu. In this example, we have selected the first eight rows in the table by clicking on the first row and dragging the highlight to row eight and selecting Find and Replace.

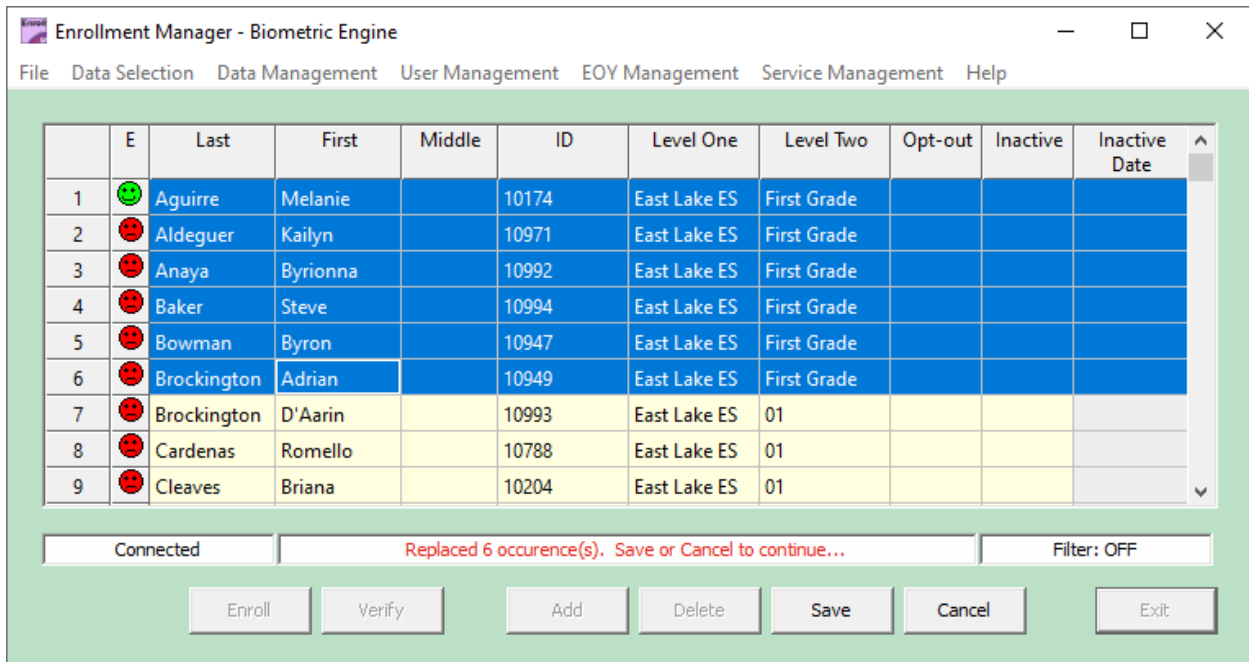


The dialog will have the **Selected Rows** radio button selected by default. We are going to search for the text “01”, matching only that word, matching only this case and only in the **Level Two** column and replace it with the text “First Grade”.

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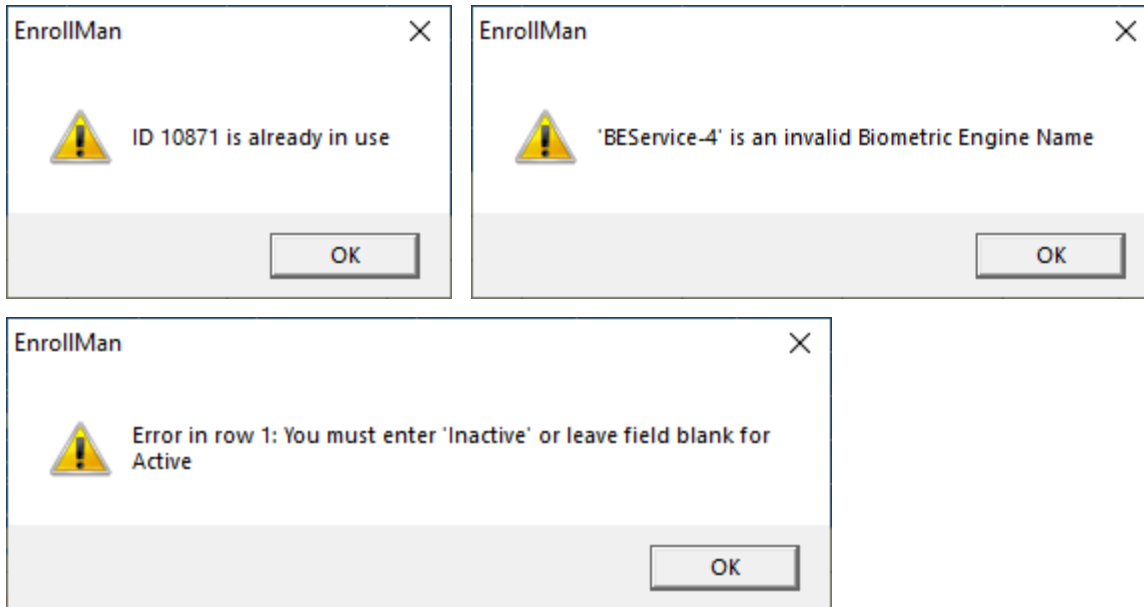
After reviewing our entries we'll click on **Replace** to make the changes. If the search text is not found, then a message will be displayed. If the search text is found, the records will be modified with the **Replace With** text and displayed as shown here.



The status box indicates that eight changes were made and lets you know that you must click on the **Save** or **Cancel** buttons before doing anything else. Clicking on **Save** saves all the changes in the database and clicking on **Cancel** will update the records in the grid to their original values and exit edit mode.

It's possible when changing a set of records, especially if modifying the ID column, that you will create an error. If this occurs, you will see a message like these indicating the issue and the first row where the error was found.

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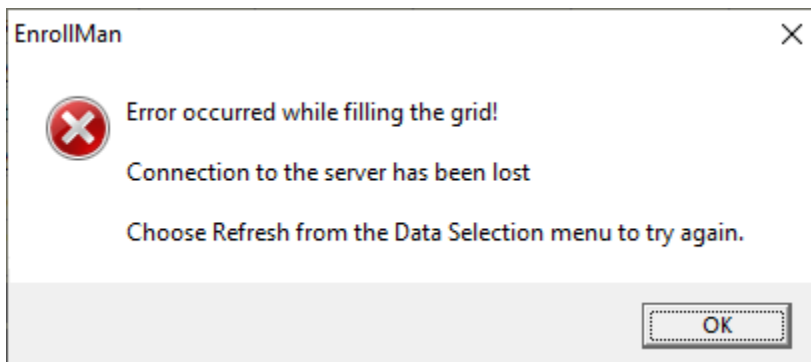


Clicking **OK** will clear the message and the Find and Replace will be cancelled.

Data Selection / Refresh

This function retrieves the latest version of all records that match the current filter. If there is no filter, it returns all the records.

If a connection error occurs when using the **Clear Filter** or **Refresh** functions you will see this error message. After fixing the problem, you can run the function again.

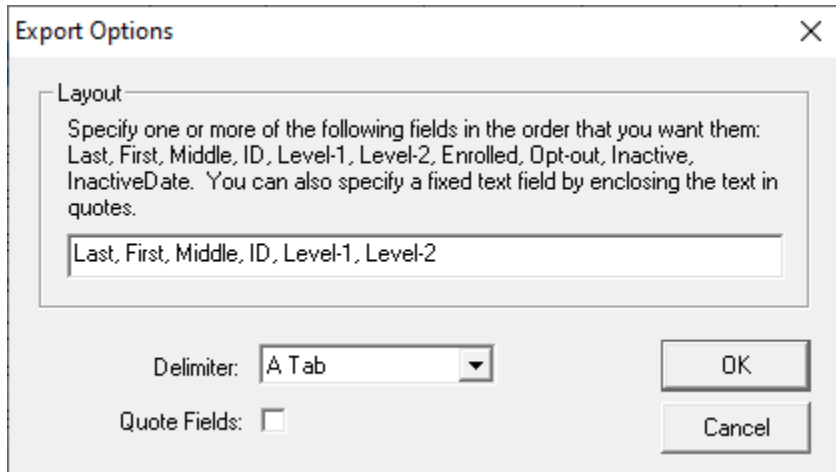


Data Management / Export

This menu item is only available when connected to a Biometric Engine or a Distributor, when **Edit Mode** includes *Auto or Edit* and when the user's role is anything other than Enroller.

The Export function writes the data from the selected records to a specially formatted text file. After selecting this menu item you will see the Export Options dialog. Here you can customize the format of the exported records.

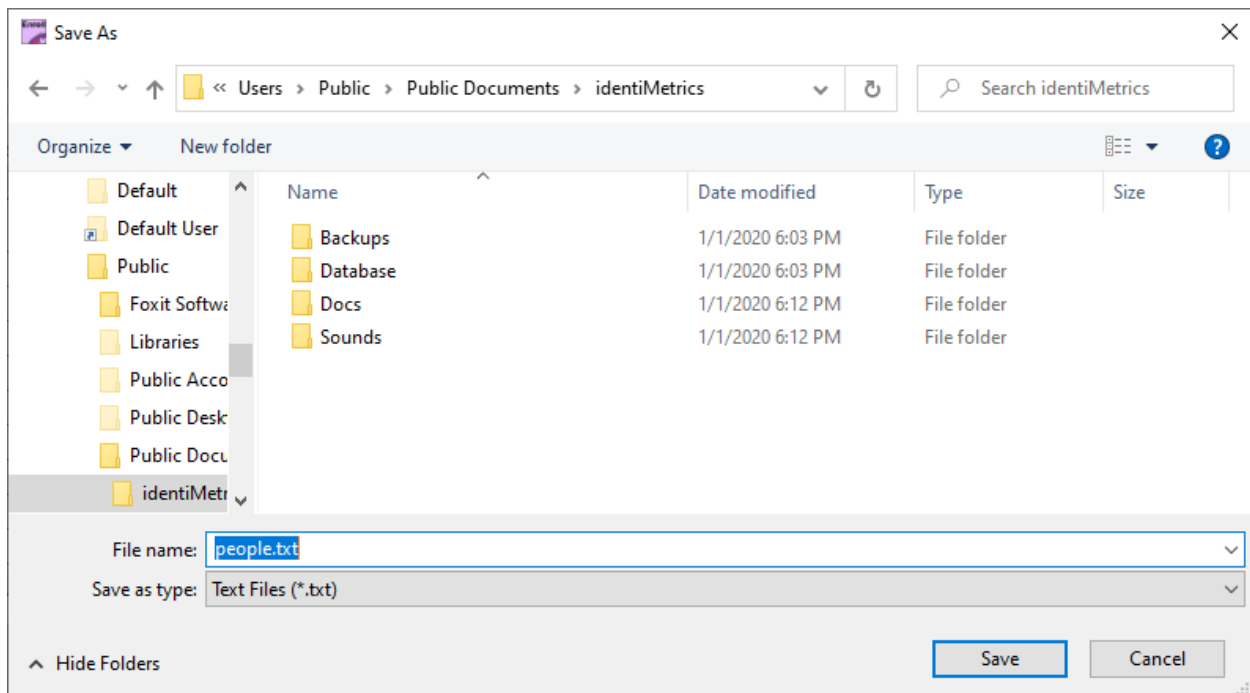
Enrollment Manager Guide



The options are:

- **Layout** – the default layout (which is set in Preferences) is displayed and you can change which fields and in what order you want them written to the file. You can also specify a fixed text field. This is simply a string enclosed in quotes that will be written as is to the file. For example you could export the name and location by specifying this layout: Last, First, Middle, “Lincoln MS”.
- **Delimiter** – specifies the character(s) that will be placed between each field.
- **Quote Fields** – when checked will cause quotes to be placed around each field.

Clicking on **OK** will continue to the **Save As** dialog.



Enter a path and a name for the export file and click on **Save**. Click on **Cancel** to exit the dialog and skip the Export.

Enrollment Manager Guide

Data Management / Import

This menu item is only available when connected to a Biometric Engine or a Distributor, when **Edit Mode** includes *Auto or Edit* and when the user's role is anything other than Enroller.

The Import function reads a specially formatted text file that you specify and adds or modifies enrollment records based on the data provided. It uses the ID of each line in the import and looks it up in the database. If a record is found with that ID, then the record will be updated with the data from the import file. If the ID is not found, then a record will be added with the data from the import file.

After selecting the menu item, you will see the Import Options dialog as shown here for a Biometric Engine.

Import Options

Layout

Specify the order of these fields to match the import file: Last, First, Middle, ID, Level-1, Level-2. All fields are required but Middle. Use a comma with no field name to skip an unwanted field in the import file.

Last, First, Middle, ID, Level-1, Level-2

Delimiter: A Tab

Quote Fields:

OK

Cancel

When connected to a Distributor the default Layout will also include the EngineNames field.

Import Options

Layout

Specify the order of these fields to match the import file: Last, First, Middle, ID, Level-1, Level-2, EngineNames. All fields are required but Middle. Use a comma with no field name to skip an unwanted field in the import file.

Last, First, Middle, ID, Level-1, Level-2, EngineNames

Delimiter: A Tab

Quote Fields:

OK

Cancel

The options are:

- **Layout** – the default layout (which is set in Preferences) is displayed and you can change which fields and in what order you want them read from the file. You can

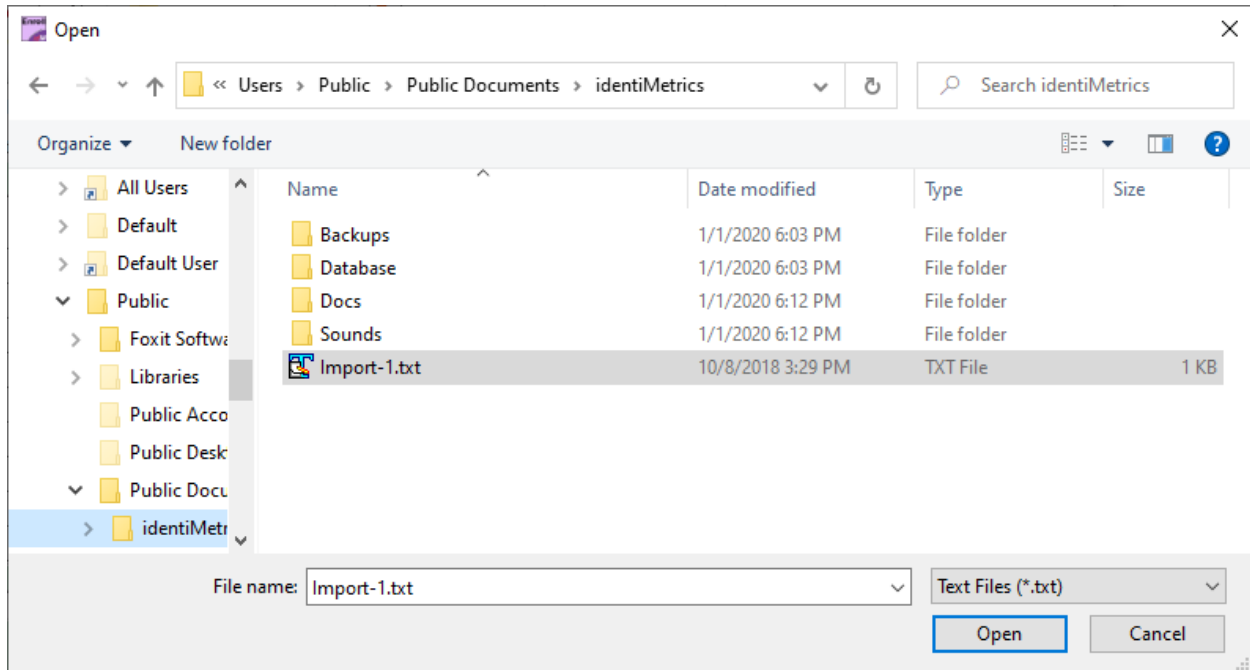
Enrollment Manager Guide

also add extra commas to skip over any fields that exist in the import file that you want to ignore. All fields must be specified in the layout except *Middle*.

- **Delimiter** – specifies the character(s) that the import file uses to separate each field.
- **Quote Fields** – when checked will cause the program to expect quotes to be placed around each field.

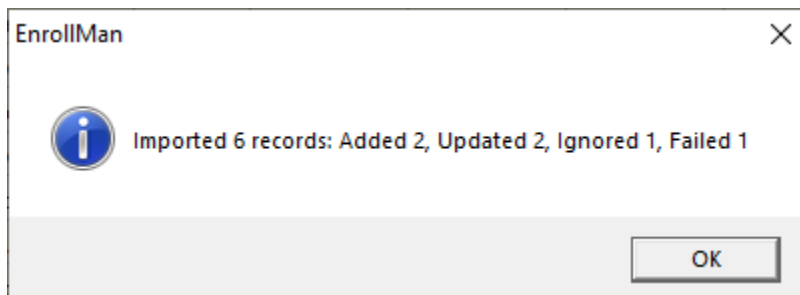
See the **Import** sections of the [identiMetrics Services Guide](#) for detailed information on setting up your import file to match the various settings.

Clicking on **OK** will continue to the **Open** dialog.



Select the import file and click on **Open**. Click on **Cancel** to exit the dialog and skip the Import.

After running the import, a message is displayed summarizing the actions taken. In this example there were 6 records in the import file. 2 were not in the current data so they were added. 2 records were found in the current data but were different so they were updated. 1 record was found in the current data but was the same so it was ignored. 1 record contained invalid data or had an invalid format.



Click on **OK** to clear the message.

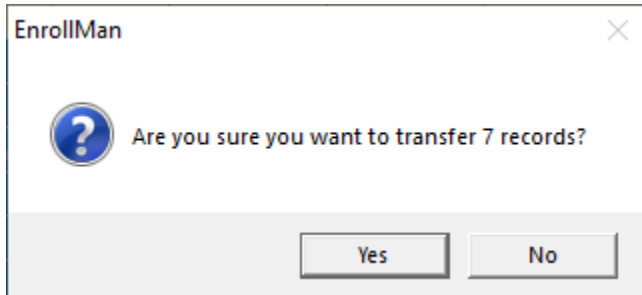
Enrollment Manager Guide

Data Management / Transfer

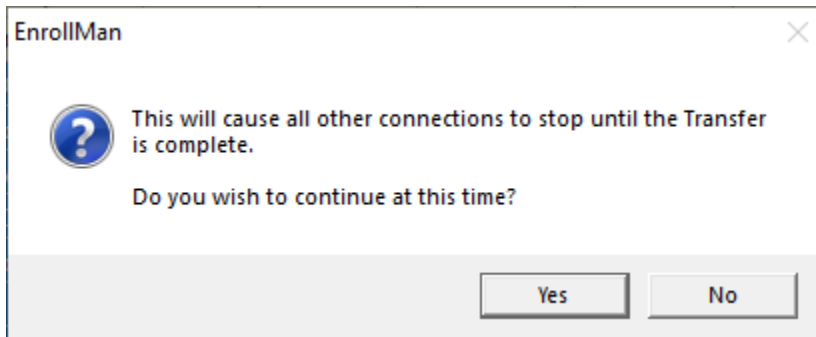
This menu item is only available when connected to a Biometric Engine, when **Edit Mode** includes *Auto or Edit* and when the user's role is anything other than Enroller.

The Transfer function removes the selected records from the database and stores them in a proprietary file that contains the text and biometric data. This file can then be merged into another database effectively moving the records from one database to another.

After selecting the Transfer menu item, you will see this warning message. Since Transfer removes records from the database, this is to insure that you wanted to do a Transfer and that you have the correct records selected.

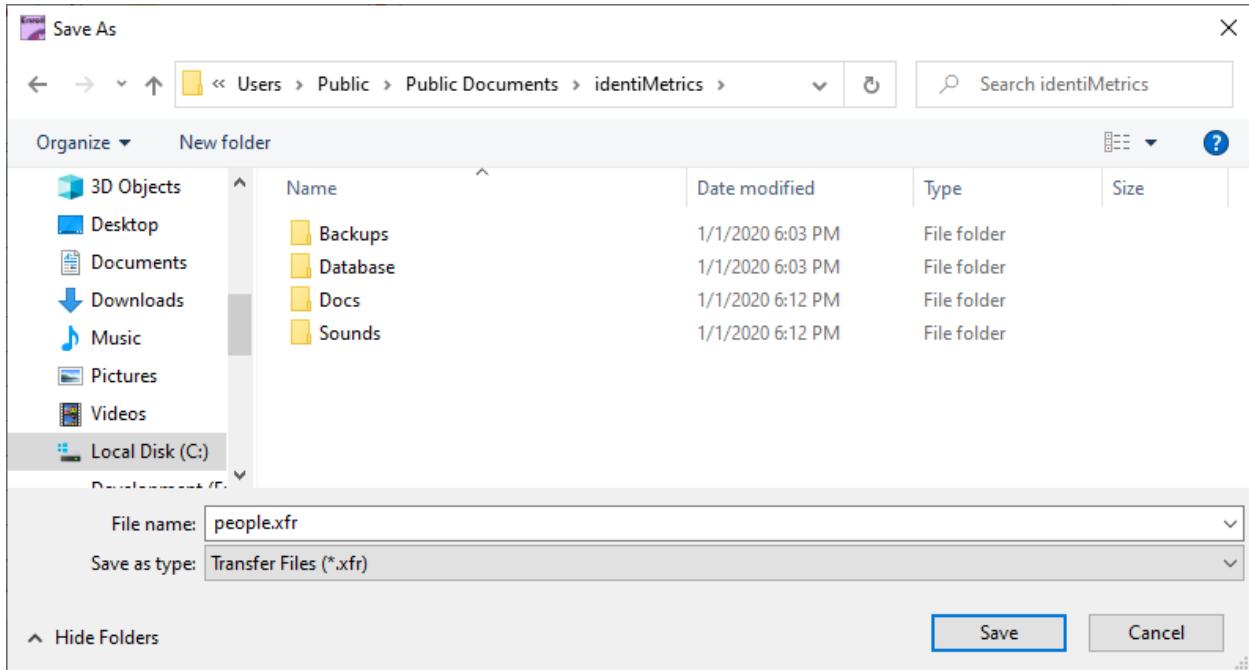


When you click **Yes**, you will be presented with another warning to let you know that the service will not perform any other actions while the transfer is working.



When you click **Yes**, you will be presented with a Save As dialog where you will provide the folder and file name where you want the transfer file to be saved. Clicking on **Save** will complete the transfer and remove the records from the grid. Clicking on **Cancel** will close the dialog and cancel the Transfer function.

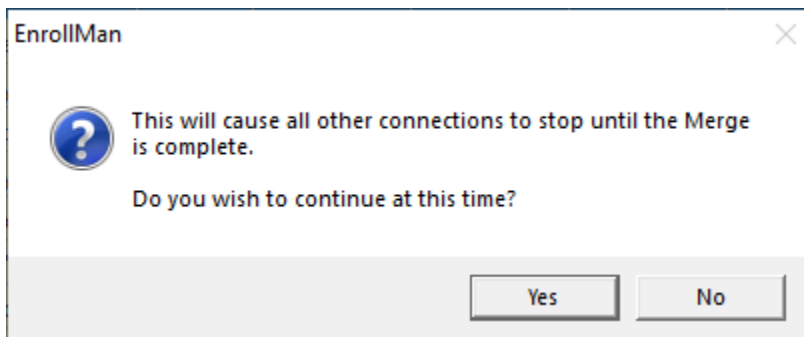
Enrollment Manager Guide



Data Management / Merge

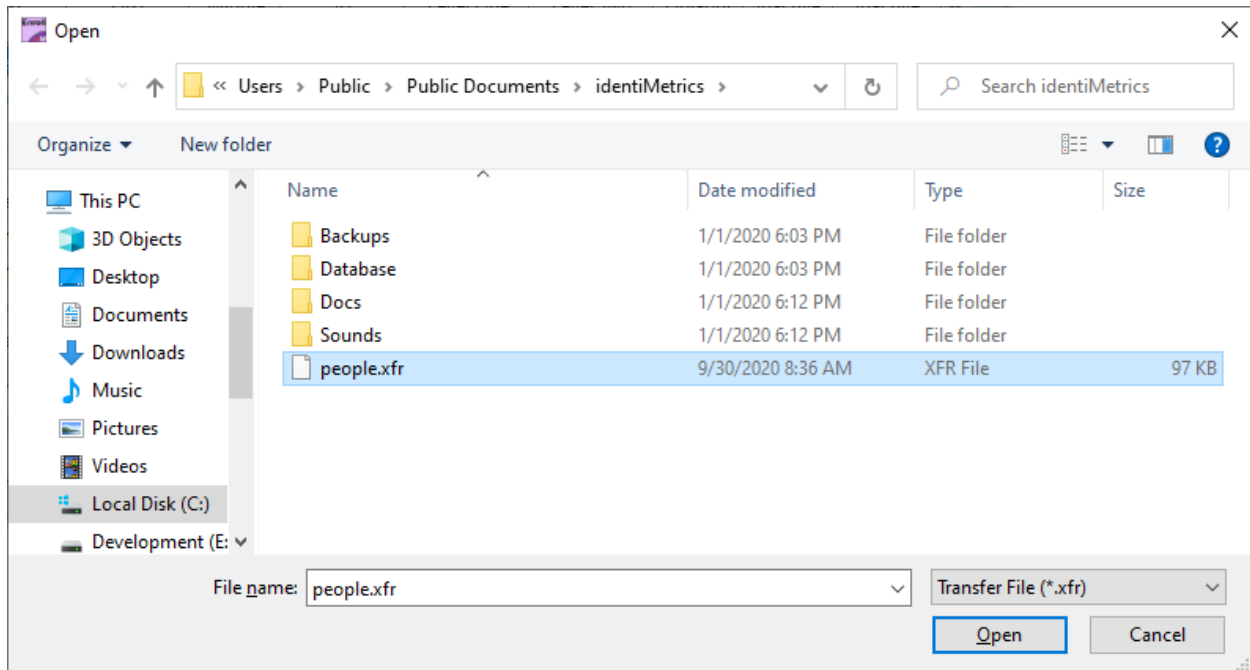
This menu item is only available when connected to a Biometric Engine, when **Edit Mode** includes *Auto or Edit* and when the user's role is anything other than Enroller.

The Merge function adds the records found in the selected transfer file to the database. The program first checks to see if the record already exists in the database by checking the ID. If it doesn't, then it's added. If the record exists in the database and all fields match the transfer record, then the program will try to enroll using the transfer record. If the database record is already enrolled or the transfer record doesn't have enrollment data, then the record is ignored. See the **Data Management | Transfer** section for information on creating a transfer file.

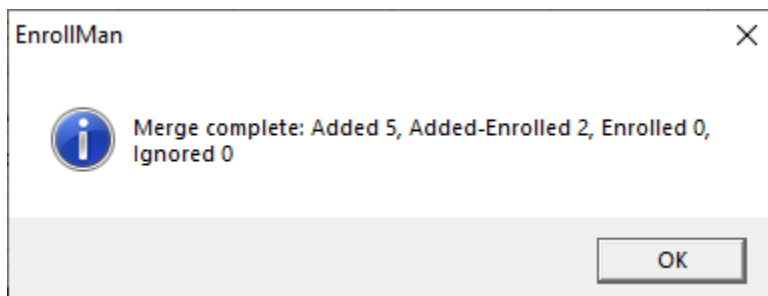


After selecting the Merge menu item you will be presented with an Open dialog where you will provide the folder and file name of the transfer file to be read. Clicking on **Open** will run the merge and update the grid. Clicking on **Cancel** will close the dialog and cancel the Merge function.

Enrollment Manager Guide



Once the Merge has completed, the results will be displayed as follows.



- **Added** records are records added to the database that were not enrolled.
- **Added-Enrolled** records are records added to the database that were enrolled.
- **Enrolled** records are records that were already in the database and were enrolled.
- **Ignored** records are records that were not added or enrolled.

In this example 2 enrolled records and 5 unenrolled records were added to the database.

User Management / My Profile

This function opens the My Profile dialog and lets you setup your own user profile. A user is a person that is authorized to login to the service and use the Enrollment Manager.

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My Profile

* Name: Default Admin

* User Name: admin

* Password: *****

* Security Question: What is your favorite color?

* Security Answer: Green

Info:

E-Mail:

NOTE: Fields marked with an asterisk(*) are required

- **Name** – Actual name of the user.
- **User Name** – The name used to login.
- **Password** – The password used to login.
- **Security Question** – The question you will be asked in case you forget your password during login. You can enter your own question or pick one of the five predefined questions.
 - What is your favorite color?
 - What was your first car?
 - What was your first concert?
 - What is your favorite city?
 - What is your favorite hobby?
- **Security Answer** – The answer to the question that must be entered exactly during login.
- **Info** – General information that can be used in any way.
- **E-Mail** – E-mail address to be used by the service to send notifications of a problem. This is only used if you are an Administrator or Manager.

Each user can change their profile information. Click **OK** to save your changes and **Cancel** to exit without saving.

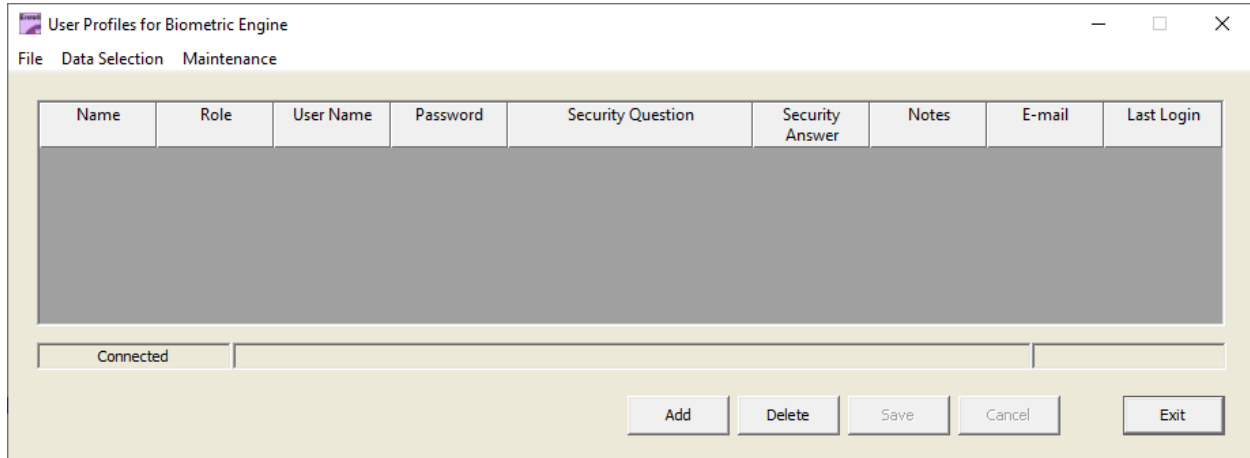
Administrators get all error or notification messages from any of the service's actions that run in the background. These include Scheduled Synch, Backup, Import, Compact and Repair and Daily Activities. Managers will only get error and notification messages from the Daily Activities. Daily Activities is responsible for license checks, enrollment count checks and EOY checks if enabled.

Enrollment Manager Guide

User Management | User Profiles...

This menu item is only accessible when logged in as an Administrator or Manager.

Selecting this function will display the User Profiles grid which is used to manage the list of Users (other than the user logged in) that can log into the Enrollment Manager.



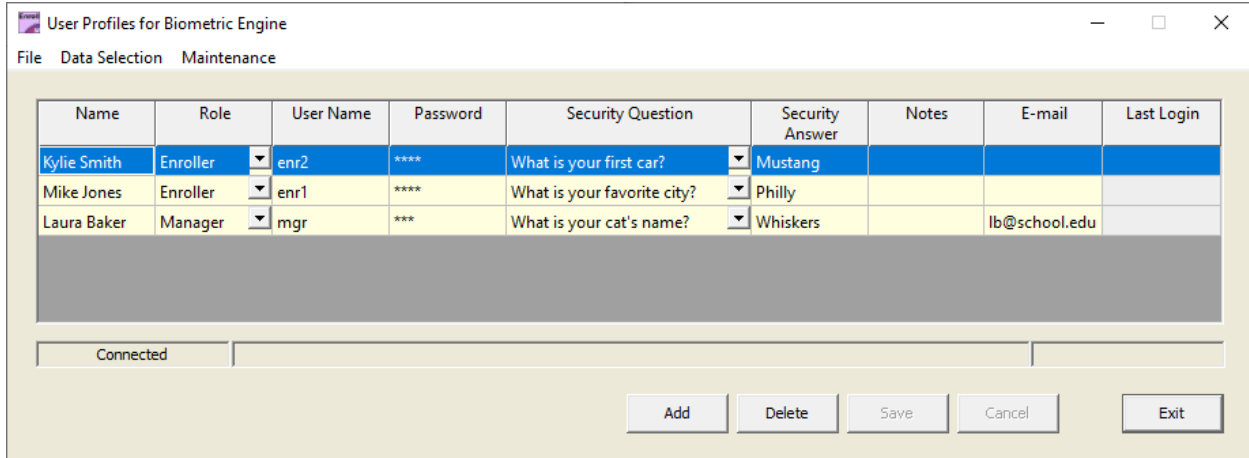
The columns are the same as the fields in the **My Profile** dialog with the addition of the **Role** and **Last Login** columns.

- **Role** – The role defines what things a user is allowed to do.
 - **Enroller** – This role is intended for users that are just going to enroll people and aren't responsible for any management tasks. An Enroller can use the filter, find and sort functions to access the records they want and is allowed to enroll any of those records. They can print, set preferences and do backups.
 - **Manager** – This role can do what an Enroller can do plus it is allowed to modify the enrollment records, use Find and Replace, use any of the Data Management functions, add and modify Manager and Enroller user profiles, use the EOY Management functions (if enabled) and can take backups and enter or review license info.
 - **Administrator** – The Administrator can do everything.
- **Last Login** – This column is read-only and shows the latest date and time that this user logged in.

The **Add**, **Delete**, **Save** and **Cancel** buttons work the same as they do in the Enrollment grid.

Here's how things might look at adding a few users.

Enrollment Manager Guide



Click on **Exit** to close the **User Profiles** grid and return to the **Enrollment** grid.

User Profiles List Import

While it's very easy to enter the users manually, it can be tedious if you have a consistent set of users that will access multiple services. For example, you have support staff or enrollers that work at multiple schools. In that case you can create an import file for the user list.

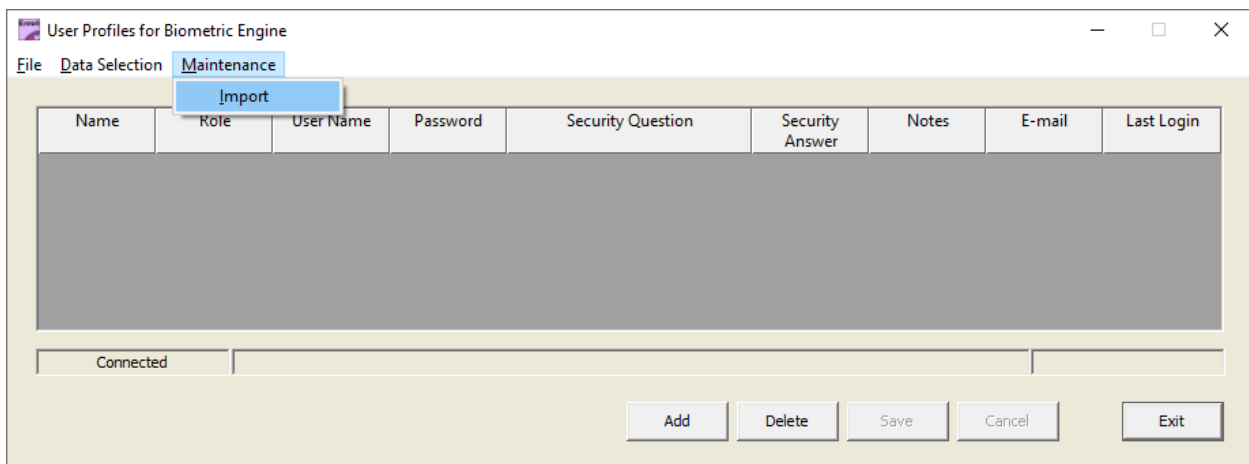
The User Profiles import file is a text file where each row corresponds to a different user. A row specifies all of the User fields separated by a TAB in this order:

Name, Role (Administrator, Manager, Enroller), User Name, Password, Security Question, Security Answer, Notes, E-mail.

Example:

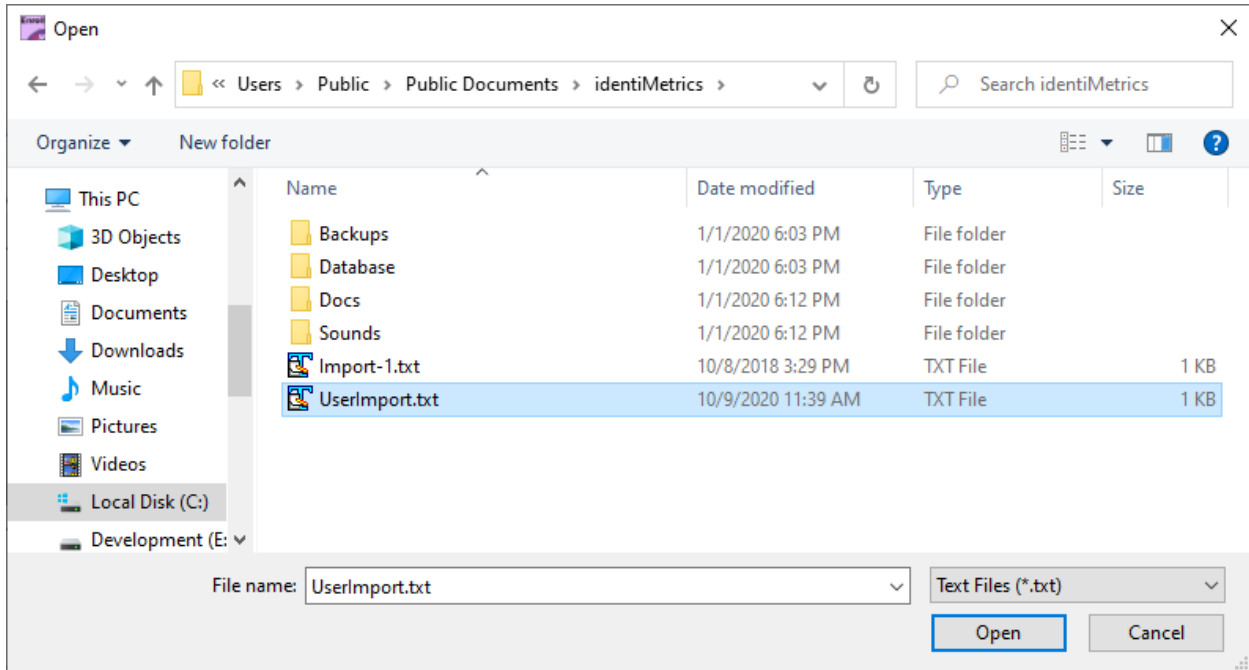
```
Laura Baker<TAB>Manager<TAB>mgr<TAB>mgrpwd<TAB>What is your cat's name?<TAB>Whiskers<TAB><TAB>lb@school.edu
```

To import a user list, click on the **Maintenance | Import** menu item.

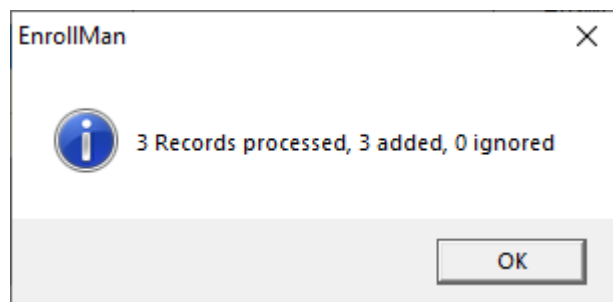
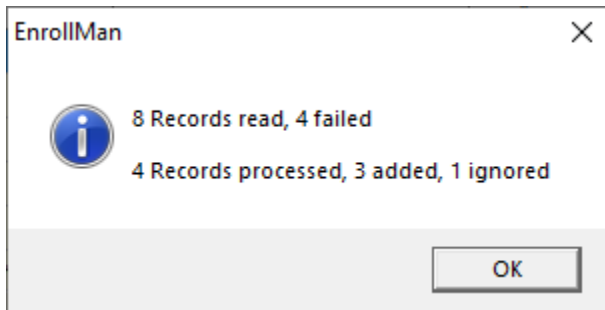


Select the file from the Open File dialog and click on **Open**.

Enrollment Manager Guide



You will get a message telling you what happened. Here is an example of an import with some errors and an import with no errors.



EOY Management

End-of-Year (EOY) Processing refers to the process in identiMetrics that enables you to modify your data at the end of the year in order to match the promotion and graduation of your students. If you are using the identiMetrics Biometric ID Platform in a school setting then the EOY process will help you manage your data as you move from one school year to the next. EOY processing is optional and can be disabled or enabled at any time using the **Properties** dialog which is available in the **Service Management** sub-menu.

Here's how it works. There are two steps needed to complete your EOY process. The first step is setting up the properties for the school year and you will use the Setup Wizard to help you accomplish it by clicking on the **Setup EOY...** menu item. The second step is running the EOY Process which will modify your data and get you ready to start your next school year. You will use the **Run EOY...** menu item to access the information you need to complete this step. To help you keep track of the EOY steps,

Enrollment Manager Guide

you will get reminders to setup your properties (Step 1) until the Setup is completed and you will get reminders at the end of the year until you run the EOY Process (Step 2).

Step 1, you set up your EOY properties using the End-of-Year Setup Wizard. The first time you setup EOY, you will provide the dates your school year starts and ends and the rules needed to modify your data and a few other properties. In subsequent years, you will only need to review your setup and make changes as needed. Review the **EOY Management | Setup EOY...** section below for the details on using the wizard.

The Daily Task (see the [identiMetrics Services Guide](#) document for information on the Daily Task) checks each day to determine if it needs to send EOY notifications or it has to process Start-of-Year (SOY) or EOY activities. When the SOY date is reached, the Daily Task will enable the **Scheduled Import – Run?** option (if the user hasn't turned it off) and when the EOY date is reached it will disable this option. After the EOY date, you will be ready for Step 2.

Step 2, at the end of your school year you have to run the EOY Process to modify the identiMetrics database using the rules you set up in the EOY Setup Wizard. You can run it manually by opening the **Run EOY...** dialog and clicking on the **Run** button (If the button is disabled, it means you have not reached your EOY date). If it is not run manually and you have set your properties to do so, it will be run automatically.

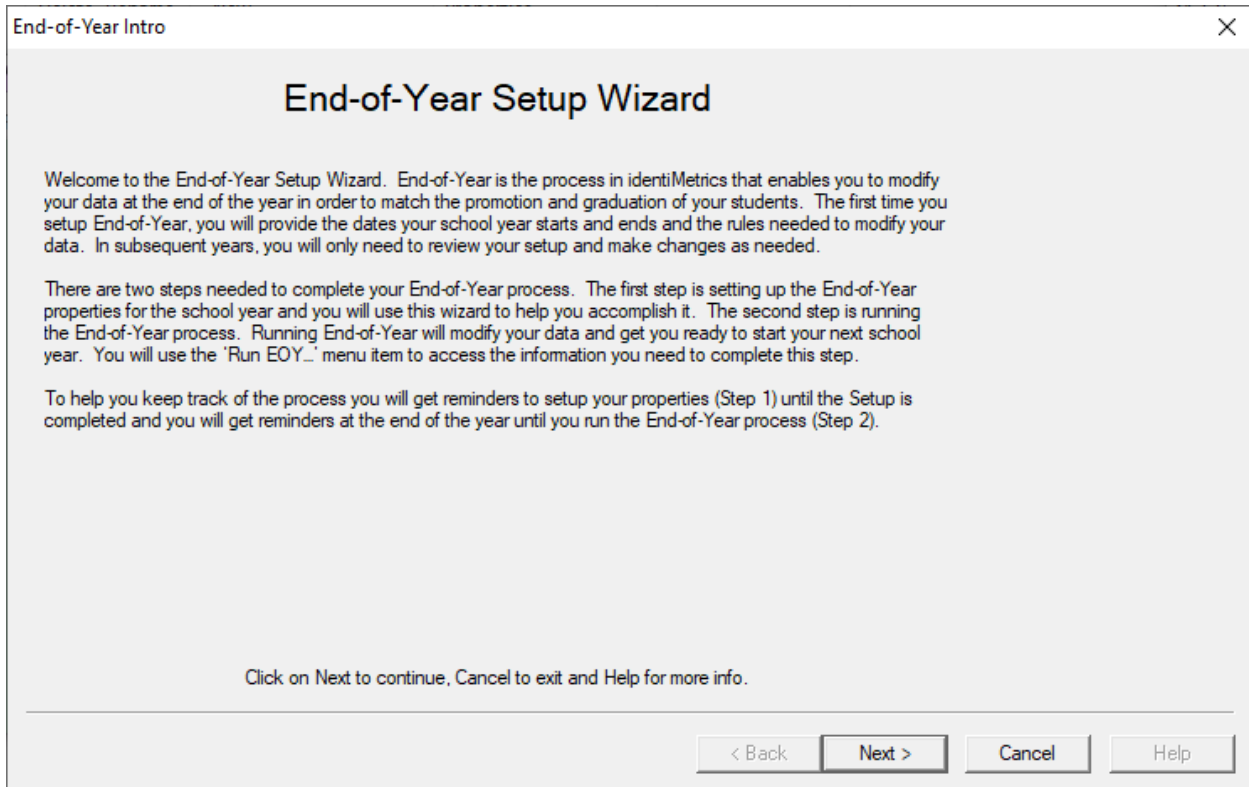
When EOY is run, whether you run it manually or it is run automatically, it will take a backup of your database, it will modify the data according to the rules, it will save this year's EOY properties and create a new school year. You will be reminded to review the new year's properties until you click on Finish at the end of the EOY Setup Wizard.

EOY Management | Setup EOY...

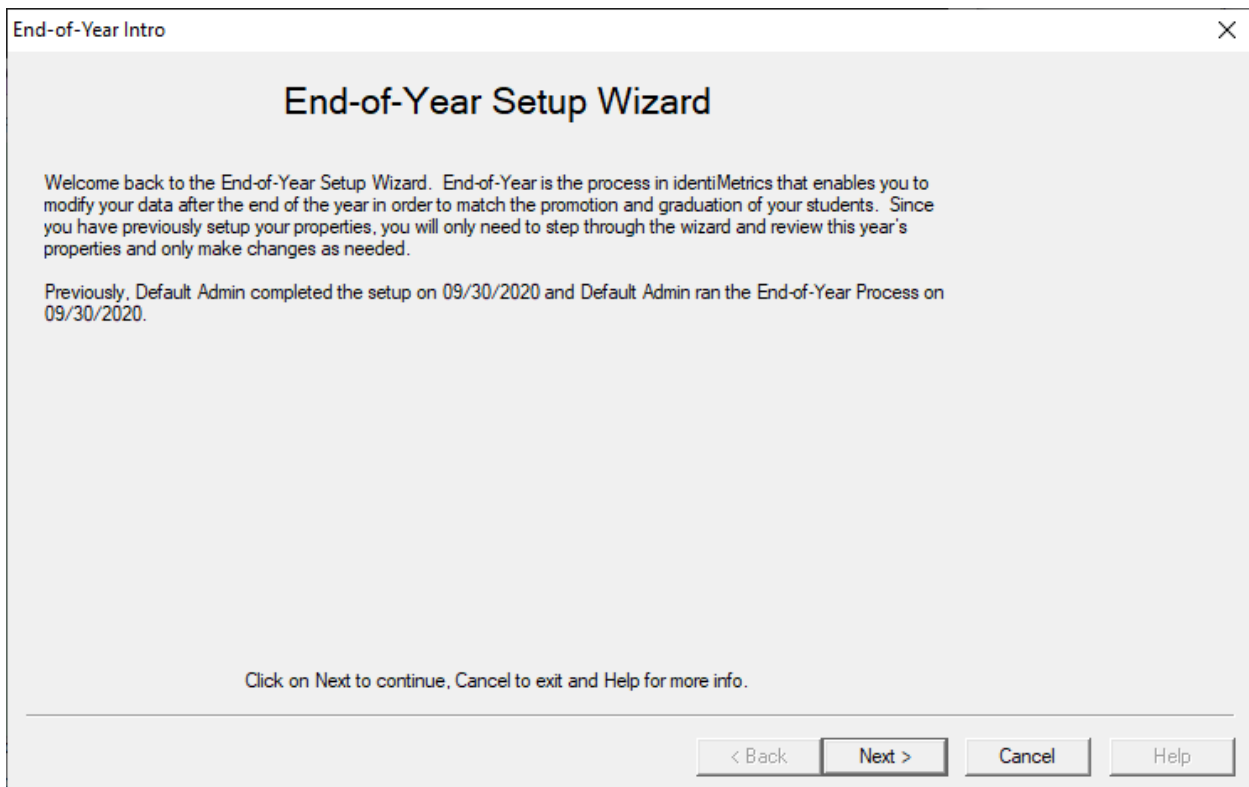
This menu item is only available when connected to a Distributor or to a Biometric Engine that is not Distributor enabled and when the user's role is Administrator or Manager.

Selecting this item will display the **End-of-Year Setup Wizard**. The introduction page is first and looks like this the first time you set up your properties. It gives you an overview of the EOY process.

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In subsequent years, the introduction page looks like this. It indicates that you have previously set up your properties and that you need to simply review and confirm your properties for the new year. It also tells you what user took the EOY actions last year.

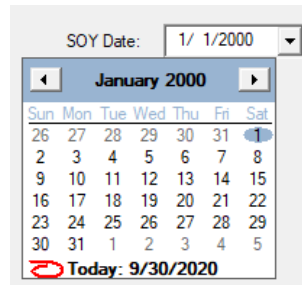


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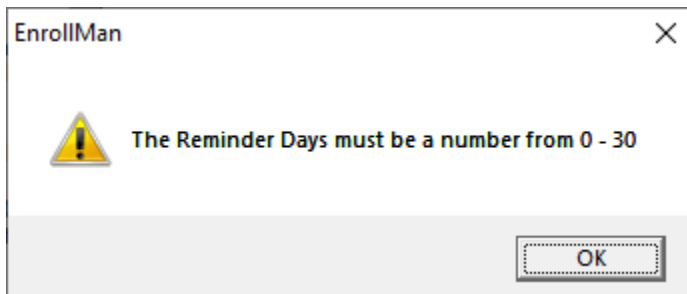
Click on **Next >** to get started.

Fill in the SOY date you want then set the 'Remind Me' days to the number of days of warnings you want. If you set the days to 0 then you won't receive any warnings.

To set the date you can type the date, use the up and down arrows to change the individual month, day or year or click on the dropdown box and pick the date using the calendar.

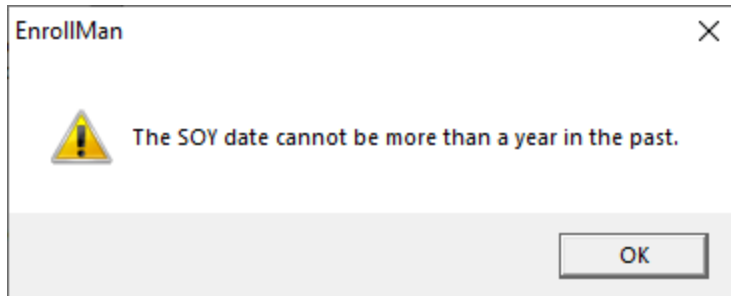


You can click **< Back** at any time if you need to review or make changes in any of the previous pages. Clicking on **Next >** will cause the wizard to check the values you entered. If everything is okay, then it will take you to the next page. If there are any issues, it will provide a message. Here are a few situations that the SOY page will flag.



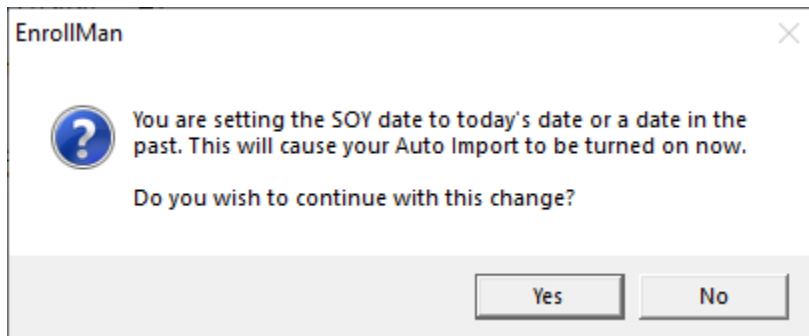
The Remind Me days must be valid.

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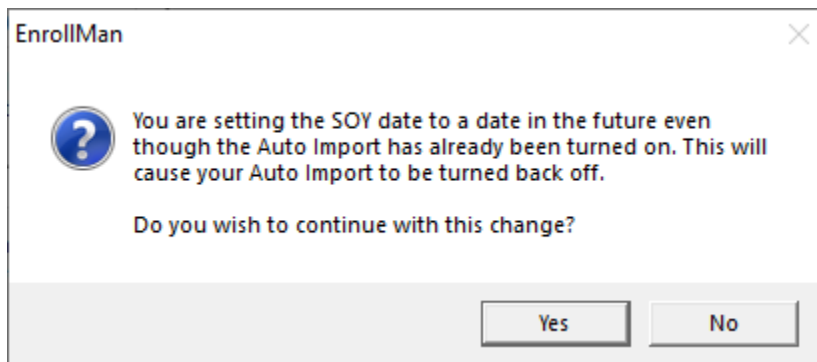


The SOY date can't be more than a year old.

This notice just lets you know that by using the date you've entered, it will run the activities associated with the SOY as soon as the wizard is finished.



This notice lets you know that by changing the date to one in future once you've already passed SOY, will undo the activities associated with the SOY as soon as the wizard is finished.

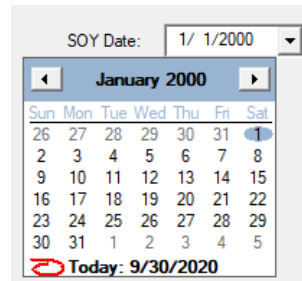


Choosing **Yes** will continue to the next page. Choosing **No** will stay on the same page and allow you to make more changes.

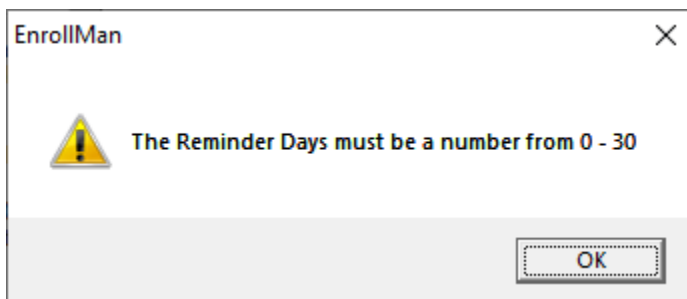
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Fill in the EOY date you want then set the 'Remind Me' days to the number of days of warnings you want. If you set the days to 0 then you won't receive any warnings.

To set the date you can type the date, use the up and down arrows to change the individual month, day or year or click on the dropdown box and pick the date using the calendar.

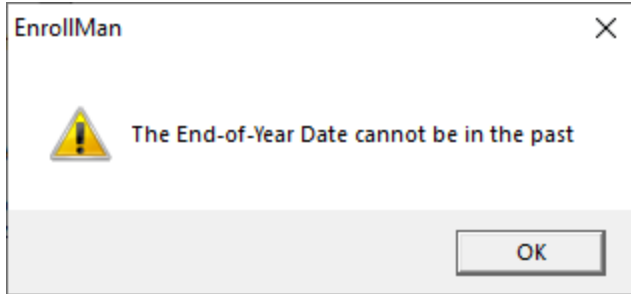


You can click **< Back** at any time if you need to review or make changes in any of the previous pages. Clicking on **Next >** will cause the wizard to check the values you entered. If everything is okay, then it will take you to the next page. If there are any issues, it will provide a message. Here are a few situations that the EOY page will flag.



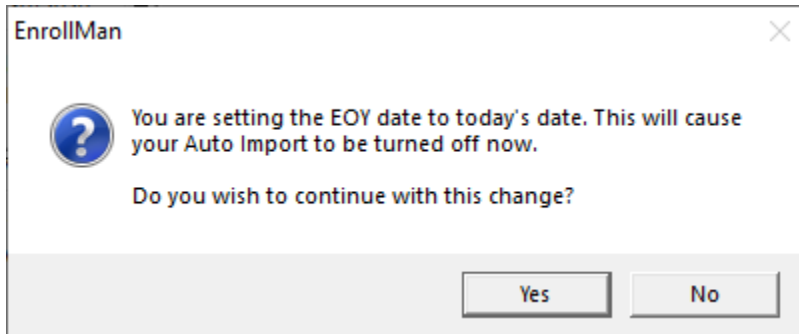
The Remind Me days must be valid.

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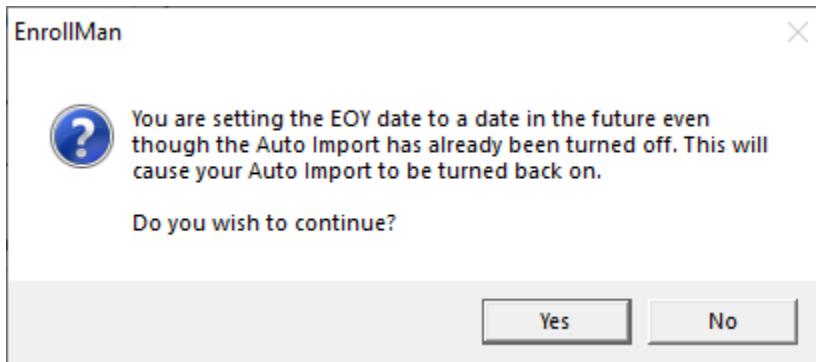


The EOY date can't be in the past.

This notice just lets you know that by using the date you've entered, it will run the activities associated with the EOY as soon as the wizard is finished.



This notice lets you know that by changing the date to one in future once you've already passed EOY, will undo the activities associated with the EOY as soon as the wizard is finished.



Choosing **Yes** will continue to the next page. Choosing **No** will stay on the same page and allow you to make more changes.

Data Modification Rules are used to change your data after the end of the year to reflect the changes to your students as they move to a new grade and possibly a new school or graduate.

Here is how the page looks in the wizard with the key elements highlighted.

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When connected to a Distributor

Data Modification Rules

Data Modification Rules

Your identiMetrics software is configured to use Auto Import. The Auto Import will adjust the grade levels and Biometric Engine Names (locations) for your students once run in the new school year. As a result, you only need to setup your rules to delete the highest grade level which will remove your graduating students.

Click on the Help button to get more information about setting up your rules.

Order	From Level One	From Level Two	From Biometric Engine Name	Action	To Level One	To Level Two	To Biometric Engine Name
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Add Delete Refresh

Click on Back to go to previous page, Next to continue, Cancel to exit or Help for more info.

< Back Next > Cancel Help

When connected to a Biometric Engine

Data Modification Rules

Data Modification Rules

Your identiMetrics software is configured to use Auto Import. The Auto Import will adjust the grade levels for your students once run in the new school year. As a result, you only need to setup your rules to delete the highest grade level which will remove your graduating students.

Click on the Help button to get more information about setting up your rules.

Order	From Level One	From Level Two	Action	To Level One	To Level Two
-------	----------------	----------------	--------	--------------	--------------

Add Delete Refresh

Click on Back to go to previous page, Next to continue, Cancel to exit or Help for more info.

< Back Next > Cancel Help

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- The **Add** button allows you to create a new rule.
- The **Delete** button allows you to delete a rule.
- The **Refresh** button discards ALL changes you've made since opening the wizard.
- The **Order** field specifies the order in which each rule change will be made. The first rule should always start with the highest grade level.
- The **From Level Columns** specify which of the current records the rule applies to.
- The **Action** field specifies what is to be done with those records. On a Distributor you can specify **Rename** or **Delete**. On a Biometric Engine you can also specify **Transfer**.
 - When the **Action** is **Rename** then the **To Level Columns** specify the new values for the Level One or Level Two values specified in the **From Level Columns**.
 - When the **Action** is **Delete** then the **To Level Columns** are not used.
 - When the **Action** is **Transfer** then the records will be removed from the database and saved to a file. This file will be created in the *Transfers* folder in the installation path. The default path is *C:\Users\Public\Documents\IdeaMetrics\Transfers*. The file will be named as follows: 'EOY'; the value of **From Level One**; the value of **From Level Two** and the date. An example would be *EOY-11-12-052216.xfr*.
- The **To Level Columns** have to match the **From Level Columns**. So, if there is a value in **From Level One**, there must be a different value in **To Level One**. The same is true for **From Level Two** and when on a Distributor the same is true for the **From Biometric Engine Name** columns.

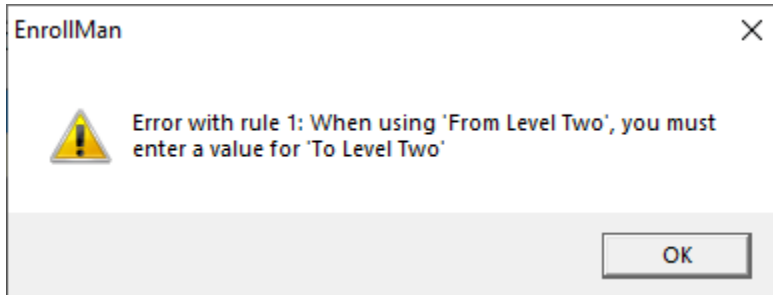
You can click **< Back** at any time if you need to review or make changes in any of the previous pages. Clicking on **Next >** will cause the wizard to check the values you entered. If everything is okay, then it will take you to the next page. If there are any issues, it will provide a message. Here are the error conditions that will be reported:

- **Delete** and **Transfer** Actions
 - 'From' and 'To' values for 'Biometric Engine Name' must be empty when using Delete
 - The 'To' values must be empty when using Delete or Transfer
- **Rename** Action
 - 'From' and 'To' values for 'Level One' must be different
 - When using 'From Level One', you must enter a value for 'To Level One'
 - When using 'To Level One', you must enter a value for 'From Level One'
 - 'From' and 'To' values for 'Level Two' must be different
 - When using 'From Level Two', you must enter a value for 'To Level Two'
 - When using 'To Level Two', you must enter a value for 'From Level Two'
 - 'From' and 'To' values for 'Biometric Engine Name' must be different

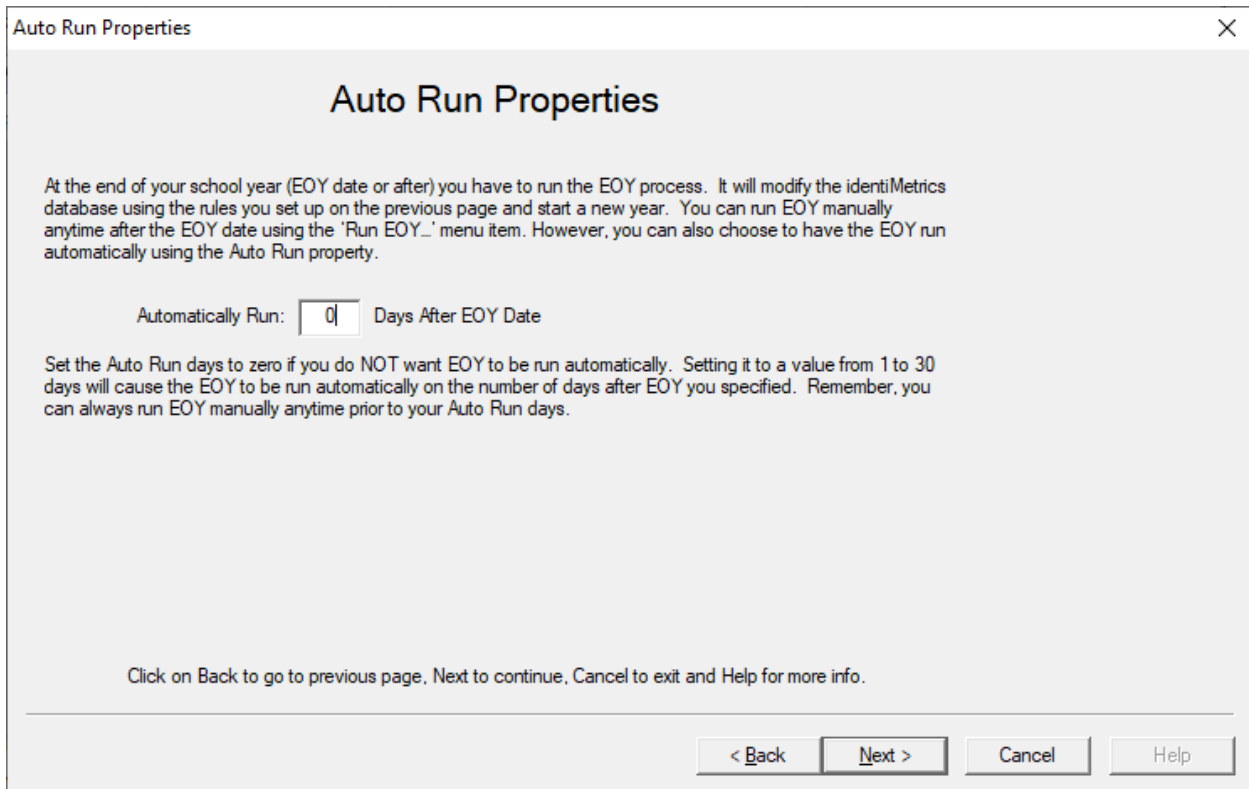
Enrollment Manager Guide

- When using 'From Biometric Engine Name', you must enter a value for 'To Biometric Engine Name'
- When using 'To Biometric Engine Name', you must enter a value for 'From Biometric Engine Name'
- You must enter a value for at least one of the 'From' fields

Here's an example of an error message.



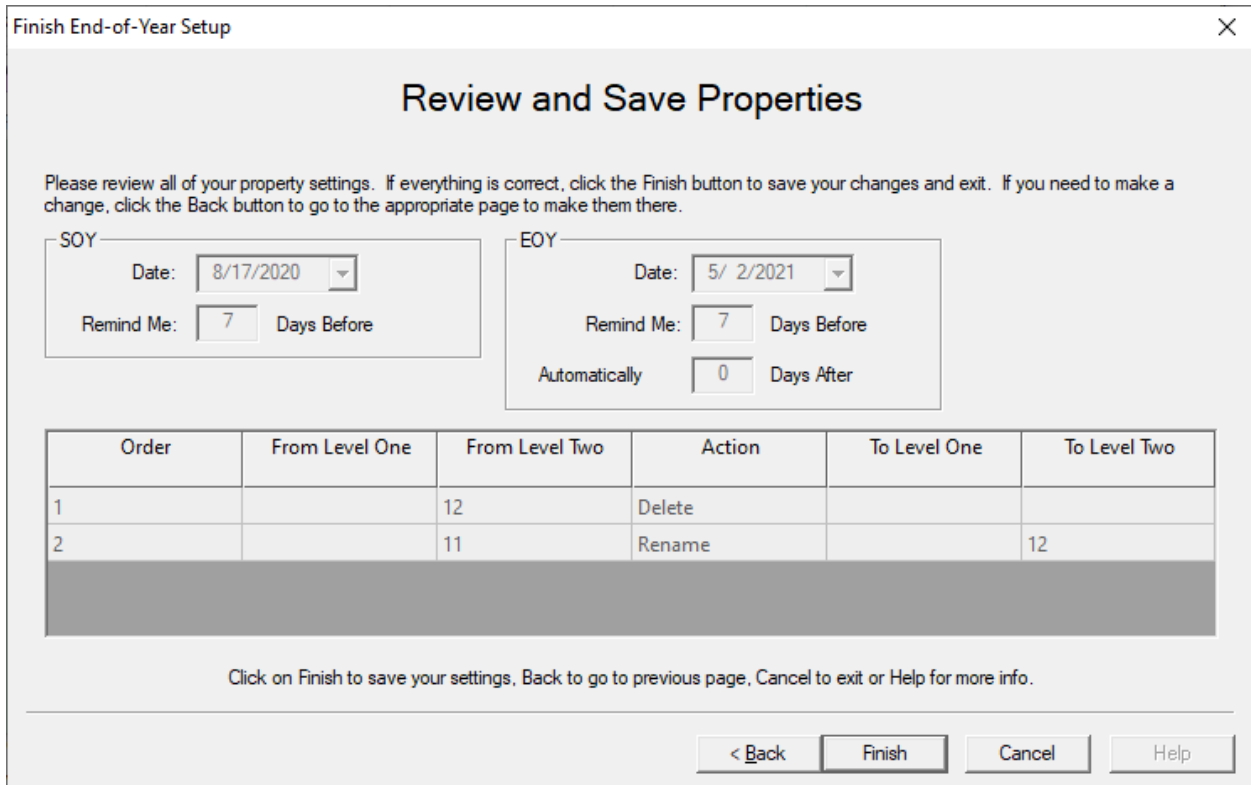
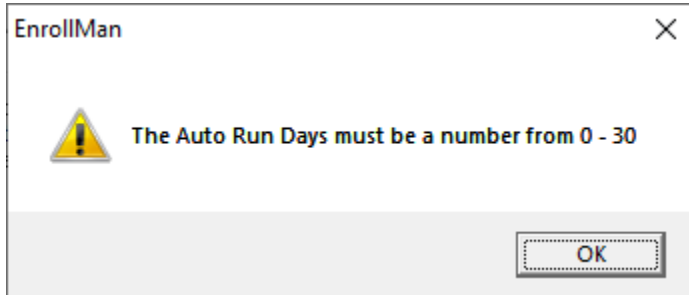
Clicking **OK** will clear the message and allow you to correct the error. Once all the errors are corrected, clicking the **Next >** button will move you to the next page.



Auto Run provides a way to tell identiMetrics that you want the EOY Process to run automatically on a certain number of days after EOY. You can set this property to a smaller value because you want the software to take care of the processing or you can set it to a larger number and use it as a precaution in case you forget. You can also leave it as zero if you always want to run the process manually.

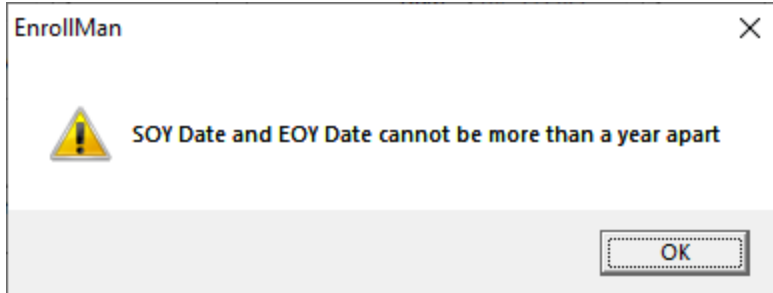
Enrollment Manager Guide

Set the value and click on **Next >** to continue to the next page. The value must be between 0 and 30.



The Finish page lets you see all of your properties at the same time so you can review them. If you need to make changes, simply use the **< Back** button to return to the appropriate page and make your changes. If you have made any changes or if you just completed a review of the new year's properties then the Finish button will be enabled. To save your changes, confirm your properties and exit the wizard, click on the **Finish** button. The wizard will now check all of your settings to make sure everything is valid. At this time, the only error that may be found is when the SOY and EOY dates are too far apart.

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If you get an error, go back and fix one or both of the dates and then try again. If everything is valid, then your EOY is set up. If you were getting 'set up' reminders they will no longer be displayed.

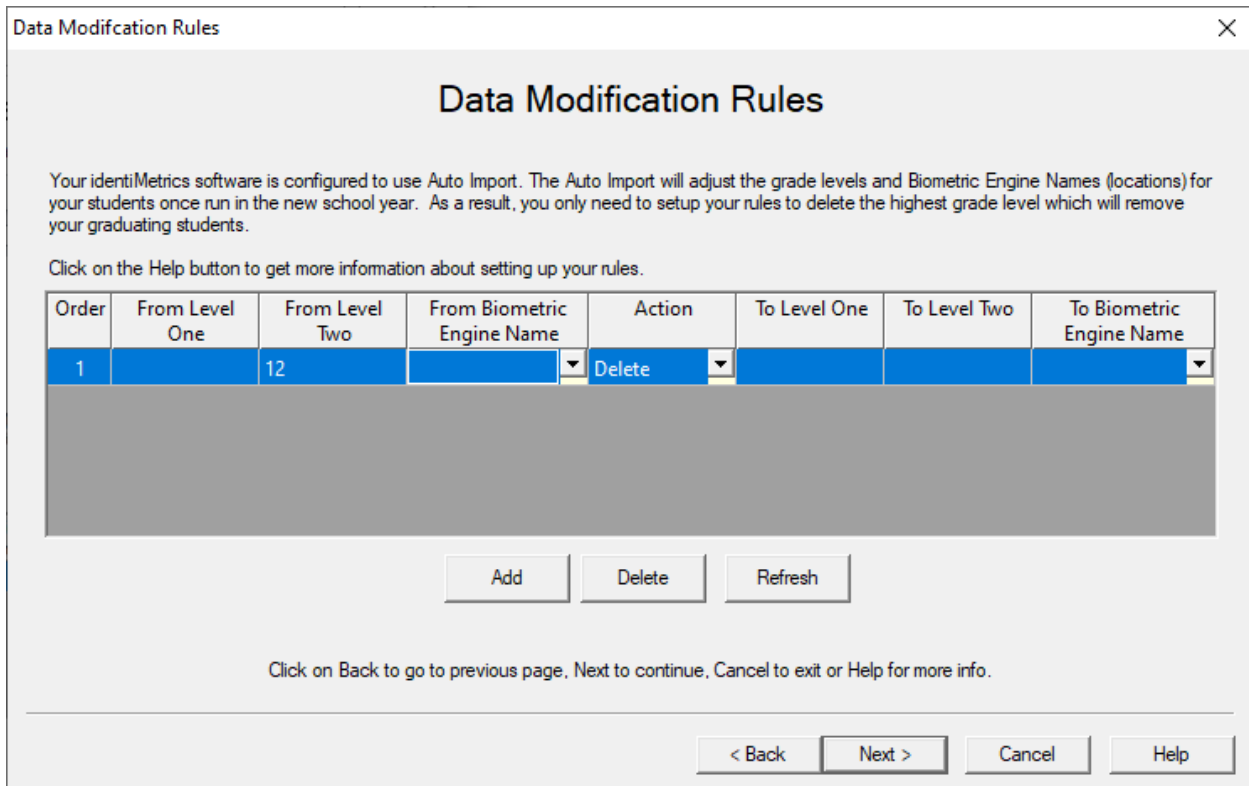
If the Finish button is not enabled, you have nothing to save and you can click on **Cancel** to exit the wizard.

Data Modification Rule Examples

When Using Auto Import

When you are using Auto Import it is responsible for making most of the changes to your enrollment data. This includes changing grade and, when using a Distributor, school information. In this case the only thing the EOY process has to handle is the graduating class. You can either use the Rename action or the Delete action depending on your preference.

Here is a Distributor example:



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The Biometric Engine example is basically the same except here I'm using the Rename action.

Data Modification Rules

Your identiMetrics software is configured to use Auto Import. The Auto Import will adjust the grade levels for your students once run in the new school year. As a result, you only need to setup your rules to delete the highest grade level which will remove your graduating students.

Click on the Help button to get more information about setting up your rules.

Order	From Level One	From Level Two	Action	To Level One	To Level Two
1		12	Rename		Graduates

Buttons: Add, Delete, Refresh

Click on Back to go to previous page, Next to continue, Cancel to exit or Help for more info.

Navigation: < Back, Next >, Cancel, Help

When NOT Using Auto Import

When you're not using an import to manage all of the promotion changes then the rules will do all of the work.

Here is a Distributor example that will 'promote' the students in a middle school and a high school.

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Data Modification Rules

Data Modification Rules

Your identiMetrics software is configured to use either a manual import or no import. Set up your rules to change each grade level and Biometric Engine Names (locations) to the next higher one for your promotions and to delete or transfer the level that is no longer in this school.

Click on the Help button to get more information about setting up your rules.

Order	From Level One	From Level Two	From Biometric Engine Name	Action	To Level One	To Level Two	To Biometric Engine Name
1		12		Delete			
2		11		Rename		12	
3		10		Rename		11	
4		09		Rename		10	
5		08	BEService-2	Rename		09	BEService-3

Add Delete Refresh

Click on Back to go to previous page, Next to continue, Cancel to exit or Help for more info.

< Back Next > Cancel Help

By scrolling down you can see the rules that affect the middle school.

Data Modification Rules

Data Modification Rules

Your identiMetrics software is configured to use either a manual import or no import. Set up your rules to change each grade level and Biometric Engine Names (locations) to the next higher one for your promotions and to delete or transfer the level that is no longer in this school.

Click on the Help button to get more information about setting up your rules.

Order	From Level One	From Level Two	From Biometric Engine Name	Action	To Level One	To Level Two	To Biometric Engine Name
3		10		Rename		11	
4		09		Rename		10	
5		08	BEService-2	Rename		09	BEService-3
6		07		Rename		08	
7		06		Rename		07	

Add Delete Refresh

Click on Back to go to previous page, Next to continue, Cancel to exit or Help for more info.

< Back Next > Cancel Help

If you're using a Biometric Engine at your high school your rules could look like this.

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Data Modification Rules
✕

Data Modification Rules

Your identiMetrics software is configured to use either a manual import or no import. Set up your rules to change each grade level to the next higher one for your promotions and to delete or transfer the level that is no longer in this school.

Click on the Help button to get more information about setting up your rules.

Order	From Level One	From Level Two	Action	To Level One	To Level Two
1		12	Delete		
2		11	Rename		12
3		10	Rename		11
4		09	Rename		10

Click on Back to go to previous page, Next to continue, Cancel to exit or Help for more info.

If you had a Biometric Engine at your middle school as well, you could use these rules to 'promote' the 6th and 7th graders and to transfer the 8th graders so you can merge them at the high school.

Data Modification Rules
✕

Data Modification Rules

Your identiMetrics software is configured to use either a manual import or no import. Set up your rules to change each grade level to the next higher one for your promotions and to delete or transfer the level that is no longer in this school.

Click on the Help button to get more information about setting up your rules.

Order	From Level One	From Level Two	Action	To Level One	To Level Two
1		08	Rename		09
2		09	Transfer		
3		07	Rename		08
4		06	Rename		07

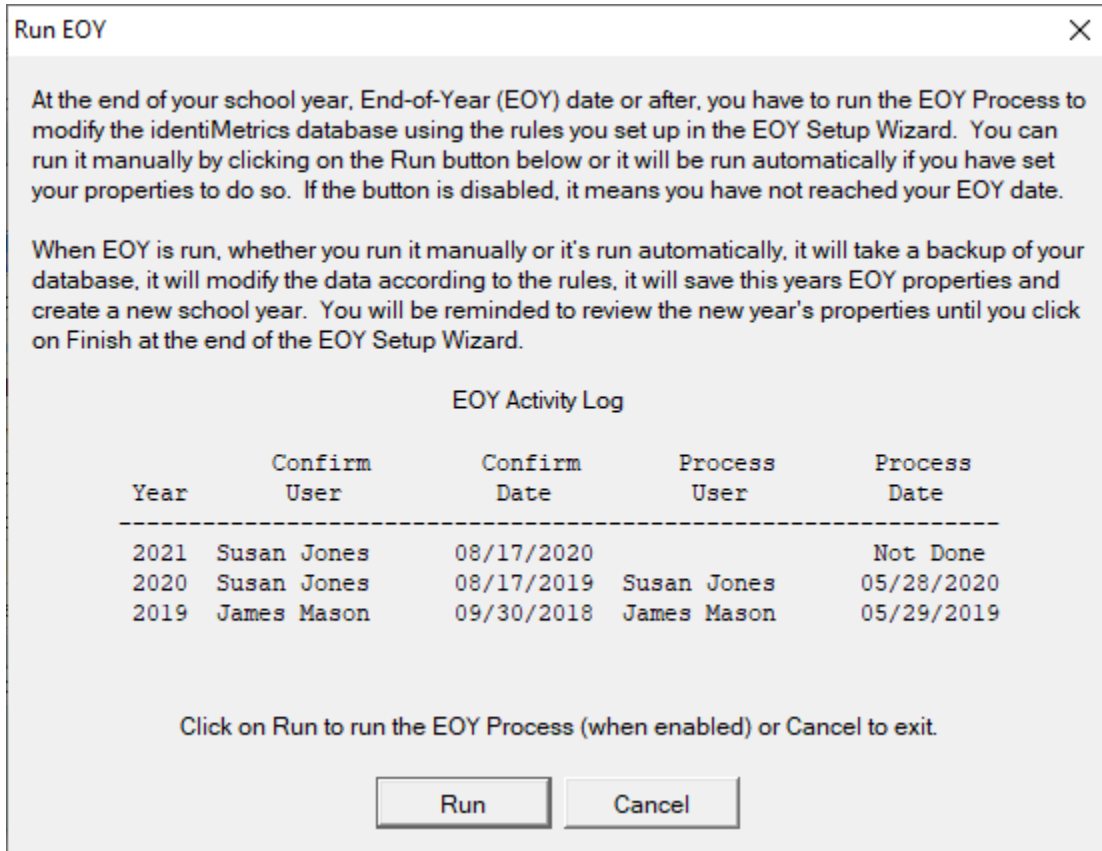
Click on Back to go to previous page, Next to continue, Cancel to exit or Help for more info.

Enrollment Manager Guide

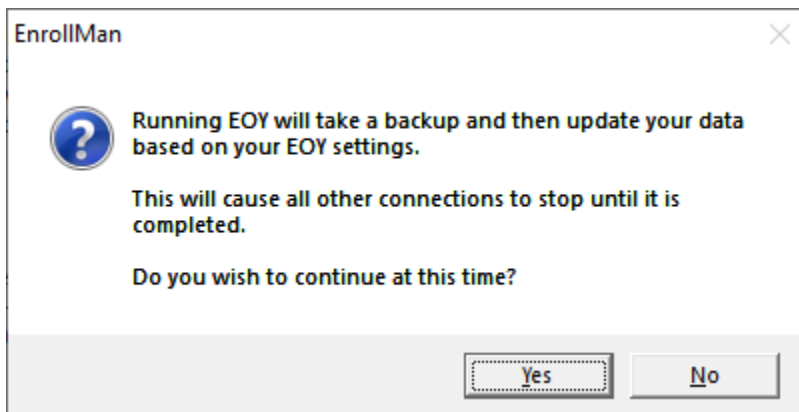
EOY Management / Run EOY...

This menu item is only available when connected to a Biometric Engine or a Distributor and when the user's role is Administrator or Manager.

The **Run EOY** dialog provides an overview about your EOY Process, shows you some history of the EOY being set up and run, and provides access to the **Run** button. The **Run** button is disabled until the EOY date is reached and then will be available until the EOY Process is run manually by clicking on the **Run** button or automatically by the Daily Task when Auto Run is set.



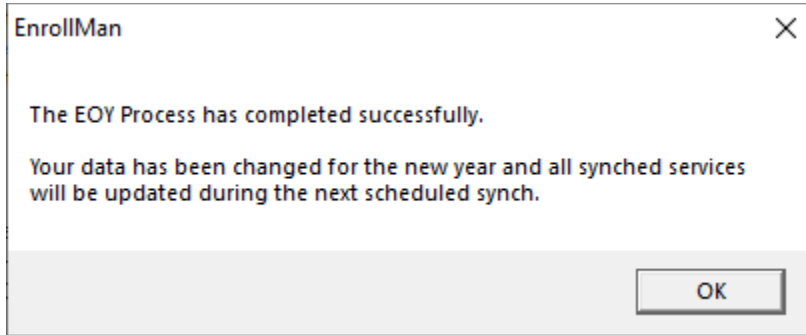
Click the Run button to run the EOY Process. You will be presented with this safety warning. Choose **Yes** to continue. Choosing **No** will return to the Run EOY dialog.



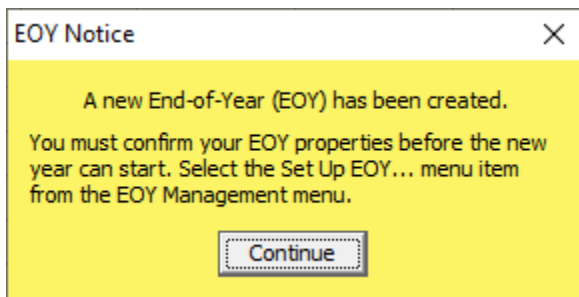
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The service will create a backup folder called *Backup.BeforeEoyProcessing* in the folder you have specified in the **Requested Backup Folder** option, it will update the data based on the modification rules and it will create a new EOY year.

Once the processing has completed you will see the confirmation message. Click on **OK** to continue.



Next you will be reminded that there is a new year and it must be reviewed before your new SOY date can be processed.

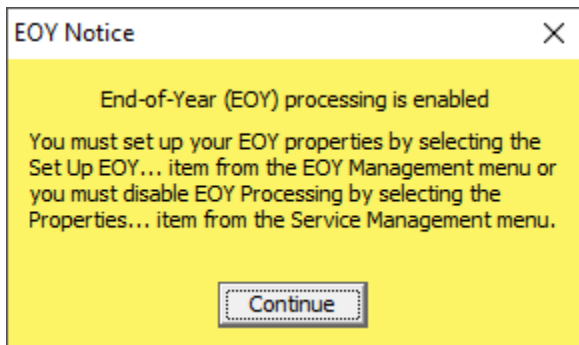


Click on **Continue** and the Enrollment grid will be refreshed to show the results of your changes.

EOY Notifications

Once EOY Processing has been enabled, the Enrollment Manager will keep track of the various EOY dates and provide you with reminder notifications. Here are the notifications that you will see after logging in.

After enabling EOY and prior to setting up your EOY properties you will see this notice.

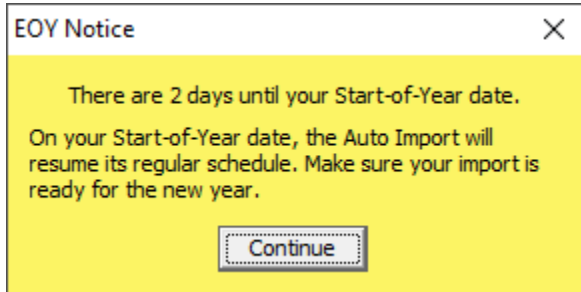


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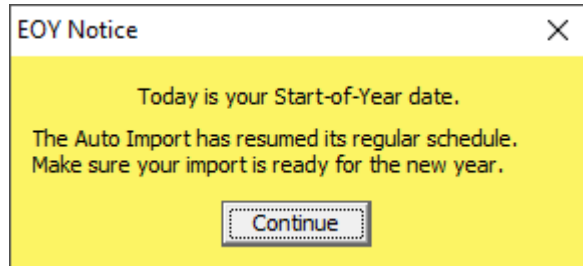
After the EOY properties have been setup, these notifications will be displayed in the appropriate dates surrounding your SOY and EOY dates.

When Auto Import is On

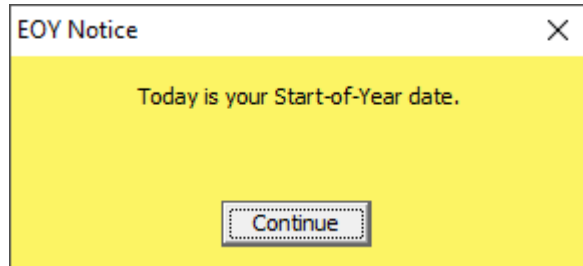
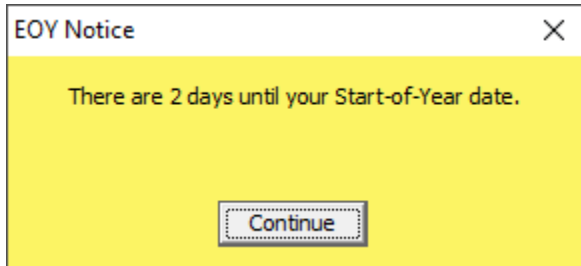
The SOY Date is Approaching



The SOY Date is Today



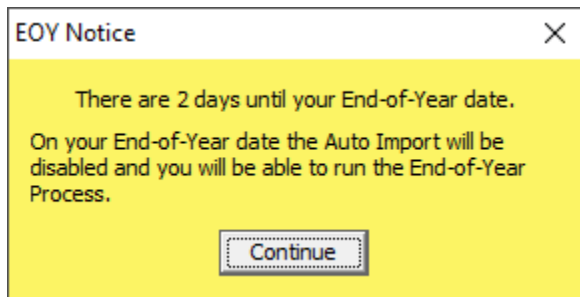
When Auto Import is Off



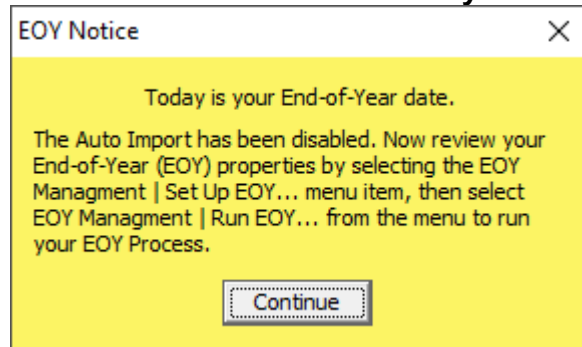
Enrollment Manager Guide

When Auto Import is On

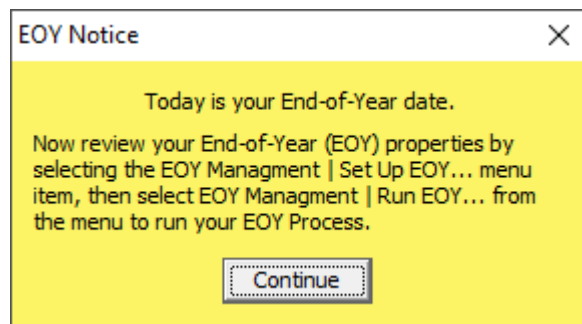
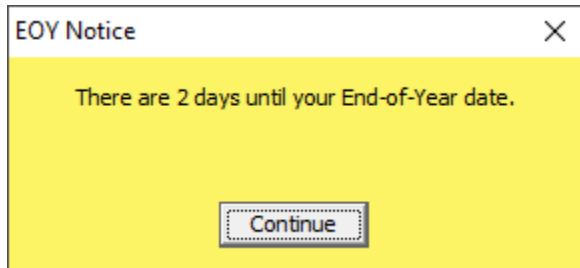
The EOY Date is Approaching



The EOY Date is Today

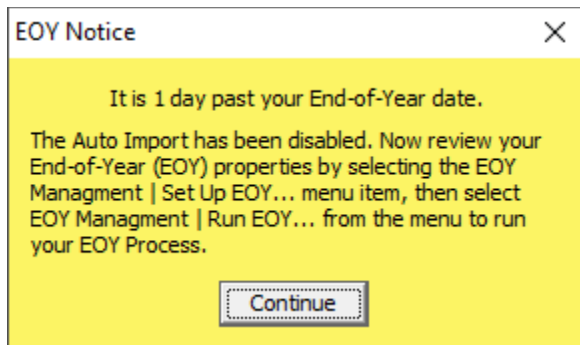


When Auto Import is Off

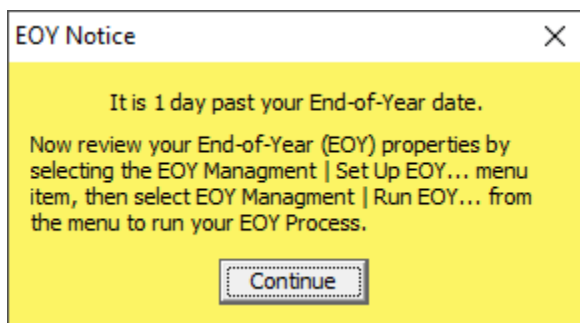


When Auto Import is On

The EOY Date has Passed

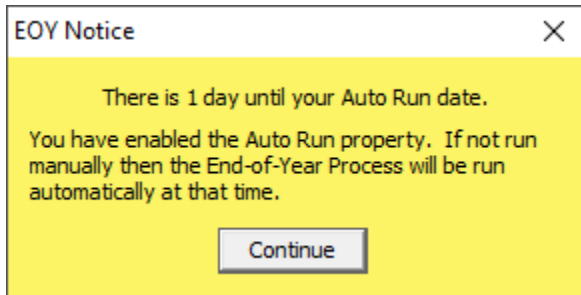


When Auto Import is Off



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If you have set the Auto Run property, then you will also see a notice letting you know that the day that the EOY Process will be run automatically is approaching.



Service Management / Backup

This menu item is only available when connected to a Biometric Engine and is NOT Distributor enabled or when connected to a Distributor and when the user's role is Administrator or Manager.

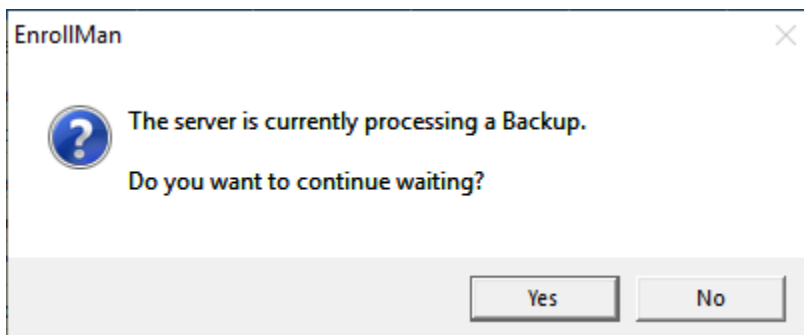
This function creates a backup of the database and places it in the **Requested Backup Folder** on the service. See the **Service Management | Options** section for information on setting the **Requested Backup Folder**.

After selecting this function the Backup Dialog is displayed. You can use the **Backup Folder** name provided or you can enter your own.



Once the name is entered, click on **OK** to run the backup or click on **Cancel** to close the dialog and quit the Backup function.

NOTE: While a backup is in progress, all other connections will be paused. If an Enrollment Manager user attempts a service function while the connections are paused, a message will be displayed letting them know the service is busy and giving them an option to wait or not.



Clicking on **Yes** will try the function again after waiting a bit. Clicking on **No** will cancel the function.

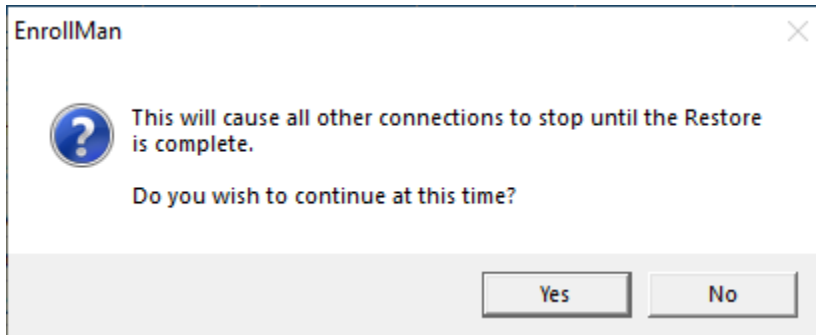
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Service Management / Restore

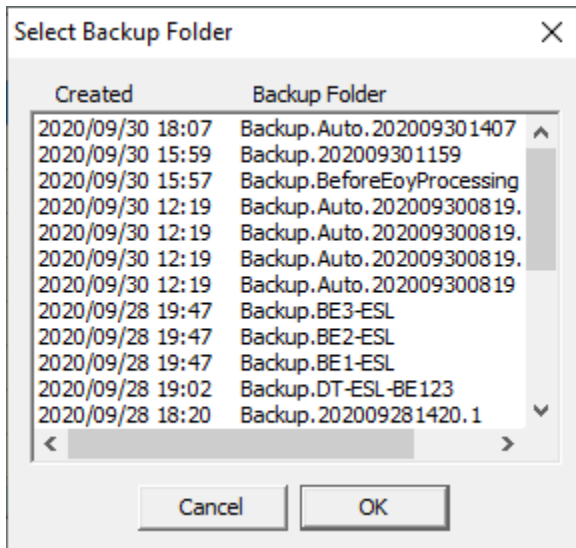
This menu item is only available when connected to a Biometric Engine and is NOT Distributor enabled or when connected to a Distributor and when the user's role is Administrator or Manager.

This function allows you to replace the current database with the database from a previous backup. This menu item is only visible when connected with a Biometric Engine and accessible when logged in as an Administrator.

After selecting this function, you will see the following warning message to make sure you want to do a restore at this time.



A restore will shut down all connections so this message gives you a chance to make sure anyone connected to this service is prepared. Clicking on **Yes** will run the Restore and clicking on **No** will cancel it. After selecting to continue, you will see the Select Backup Folder dialog. This dialog displays all the backups sorted from the newest to the oldest for you to choose from.



Click on the backup you wish to use for the Restore and click on **OK** to start the Restore. Clicking on **Cancel** will close the dialog and quit the Restore.

The Restore will stop the service (which closes all the connections), delete the existing database, copy in the backup database you selected and restart the service. If there is

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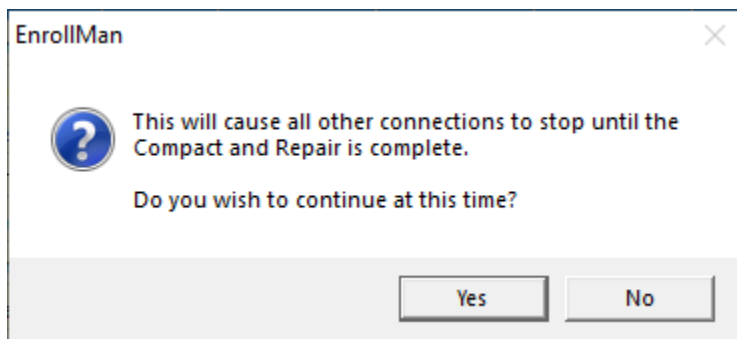
any problem in copying or starting the new database, the previous database will be reinstated.

Service Management / Compact and Repair

This menu item is only available when connected to a Biometric Engine a Distributor and when the user's role is Administrator or Manager.

The Compact and Repair function checks on the validity of the database, removes any deleted records and compresses the database. This is useful after deleting or transferring any significant amount of records to both free up space and to also reduce the enrollment count which is regulated by the license. This menu item is only visible when connected with a Biometric Engine and accessible when logged in as an Administrator.

After selecting this function you will see the following warning message to make sure you want to do a Compact and Repair at this time.



A Compact and Repair will shut down all connections so this message gives you a chance to make sure anyone using this service is prepared. Click on **Yes** to run the function and **No** to cancel the function and return to the Enrollment grid.

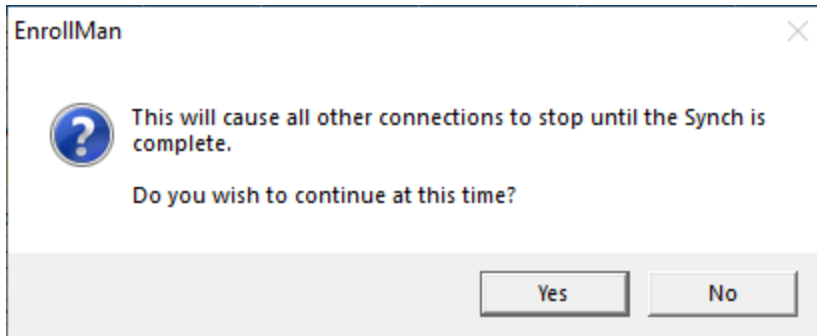
Service Management / Synch Now

This menu item is only available when connected to an ID Provider and when the user's role is Administrator.

The Synch Now function contacts the Biometric Engine with the connection information that you have specified in the 'Scheduled Synch To Service Address' and 'Scheduled Synch To Service Port' options and requests a synch. This is the same function that occurs when running a Scheduled Synch only it's run on request. See the **ID Provider | Synchronization** section in the **identiMetrics Service Guide** document for more information.

After selecting this function you will see the following warning message to make sure you want to do a Synch at this time.

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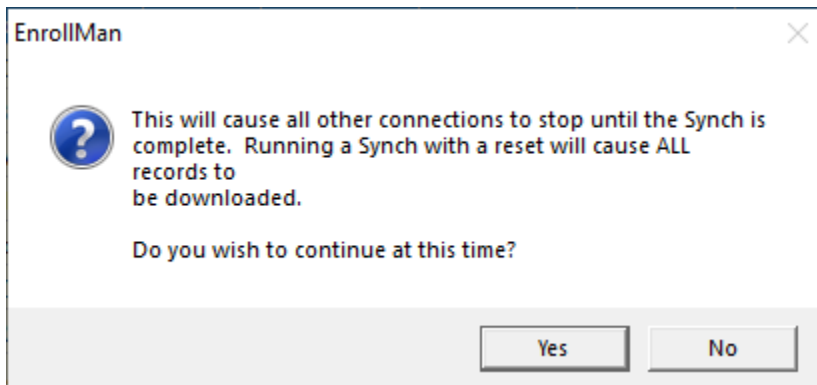
A Synch will pause all other connections so this message gives you a chance to make sure anyone using this service is prepared. Click on **Yes** to run the function and **No** to cancel the function and return to the Enrollment grid.

Service Management | Synch Now - RESET

This menu item is only available when connected to an ID Provider and when the user's role is Administrator.

The Synch Now – RESET function contacts a Biometric Engine with the connection information that you have specified in the 'Scheduled Synch To Service Address' and 'Scheduled Synch To Service Port' options and requests a synch. The difference between Synch Now and this function is that the database will be cleared of all records and a full synch will be run. This is useful if the ID Provider has experienced a problem and you want to reset it to the current data at the Site. This is the same function that occurs when running a Scheduled Synch only it's run on request. See the **ID Provider | Synchronization** section in the **identiMetrics Servers Guide** document for more information.

After selecting this function you will see the following warning message to make sure you want to do a Synch at this time.



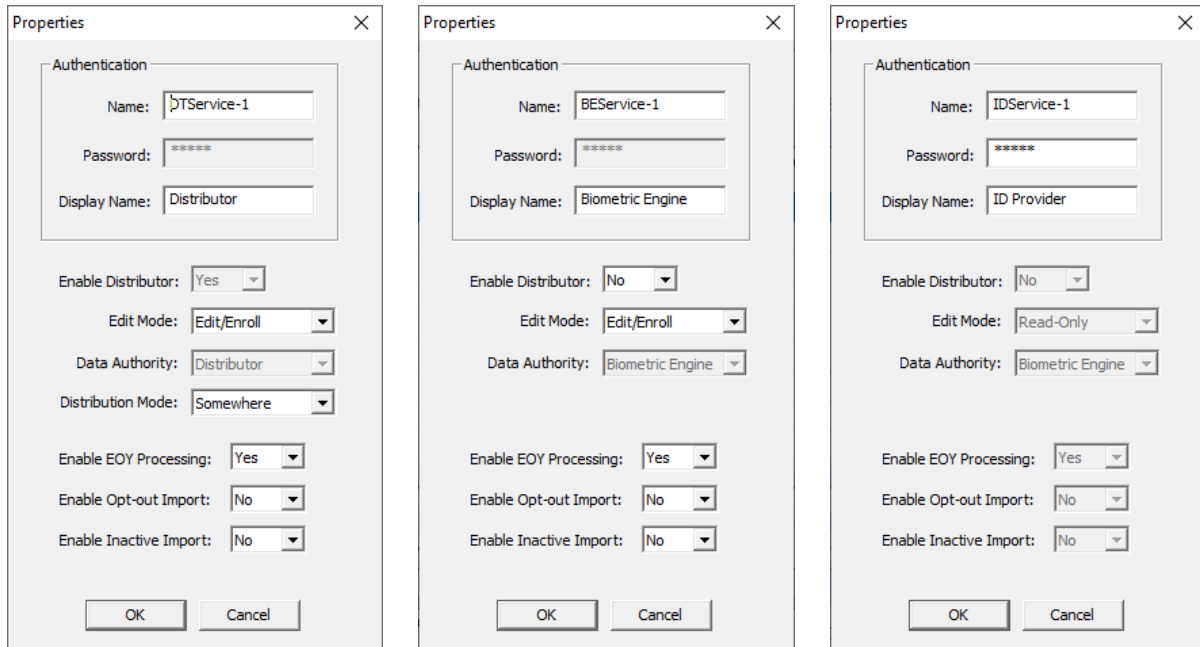
A Synch will pause all other connections so this message gives you a chance to make sure anyone using this service is prepared. Click on **Yes** to run the function and **No** to cancel the function and return to the Enrollment grid.

Service Management | Properties...

This menu item is only available when the user's role is Administrator.

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The Properties dialog lets you define the identity of the service and control some of its behavior.



Authentication

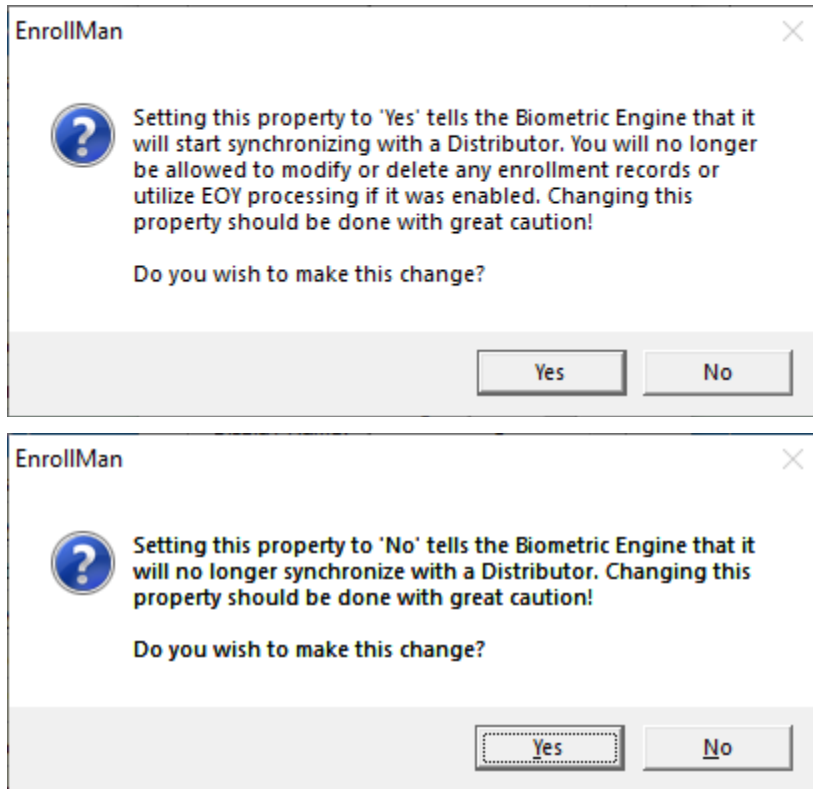
These fields are used when connecting to another service for synchronization. This applies to an ID Provider connecting to a Biometric Engine or a Distributor connecting to a Biometric Engine. It must match the **Name** and **Password** specified in the **Synching ID Providers** dialog of the Biometric Engine or the **Synching Biometric Engines** dialog of the Distributor. See the applicable sections in this document for information on setting up the locations for synchronization.

- **Name** – name for this service that will be used for authentication. Initially set as shown above.
- **Password** – name for this service that will be used for authentication. Initially set as 'BEpw1' for a Biometric Engine and 'IDpw1' for an ID Provider.

Additional

- **Display Name** – the public name of this service. Typically it describes the location of the people in the database (e.g. 'Famous Person High School'). Initially set as shown above.
- **Enable Distributor** – this property is only available when connected to a Biometric Engine. When set to **Yes**, it means the Biometric Engine will be synchronizing with a Distributor and when set to **No**, it will not. Initially set as shown above.
 - When you change this property you will receive one of these warnings to insure you are making the change you wish.

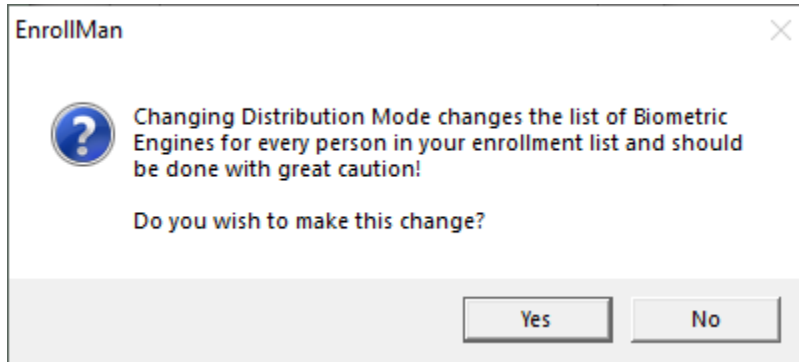
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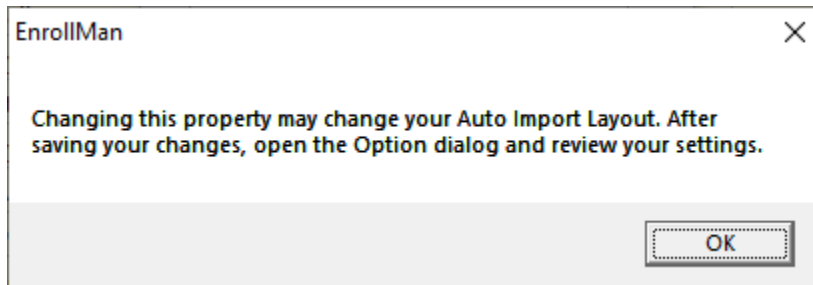
- **Edit Mode** – this describes the actions that are allowed on the data for this service. There may be additional limitations based on the user that is logged in. Initially set as shown above. This property is only modifiable when the connected service is the Data Authority.
 - **Read-Only** – means the data cannot be changed. Typically only applies to the ID Provider.
 - **Enroll** – means only Enroll and Verify are available.
 - **Auto** – means that Import and Export are available and for a Biometric Engine Transfer and Merge are available.
 - **Auto/Enroll** – combines Auto and Enroll.
 - **Manual** – means you can make changes in the grid. You can add, update and delete records.
 - **Manual/Enroll** – combines Manual and Enroll.
 - **Edit** – combines Auto and Manual.
 - **Edit/Enroll** – combines Auto, Manual and Enroll.
- **Data Authority** – is currently read-only.
- **Distribution Mode** – the value of this property determines whether different people can be distributed to different locations (**Somewhere**) or whether every person is distributed to every location (**Everywhere**). When **Somewhere** is selected the Enrollment Grid will show the Biometric Engine Names field and each person must have at least one name specified. It is only available when the connected to a Distributor. Initially set as shown above.

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- When you change this property you will receive this warning to insure you are making the change you wish.



- **Enable EOY Processing** – determines if the EOY menu and features will be available. This property is only modifiable when the connected service is the Data Authority. Initially set as shown above.
- **Enable Opt-out Import** – this property determines if the Opt-out field is a required field in the import file (**Yes**) or not (**No**). It is only modifiable when the connected service is the Data Authority. Initially set as shown above.
 - When you change this property you will receive this warning to insure you are making the change you wish.



- **Enable Inactive Import** – this property determines if the Inactive field is a required field in the import file (**Yes**) or not (**No**). There is an additional option which is **Auto**. When set to **Auto**, the *Inactive* field will NOT be required in the import file. When an import is run, ALL the valid records that appear in the file will be marked as **Active** and any record that is in the database that is NOT in the file will be marked as **Inactive**. It is only modifiable when the connected service is the Data Authority. Initially set as shown above.
 - When you change this property you will receive the same warning as when changing **Enable Opt-out Import** to insure you are making the change you wish.

When the **Enable Opt-out Import** and **Enable Inactive Import** properties are changed it will change the Enrollment Manager's default Import and Export layouts and the **Scheduled Import – Layout** option. Setting these properties to **Yes** will add the appropriate fields and setting them to **No** or **Auto** will remove the fields. *Please note that the field names will be added to the end of the layout. If your import file has them in a different order then you will have to edit these options before importing.*

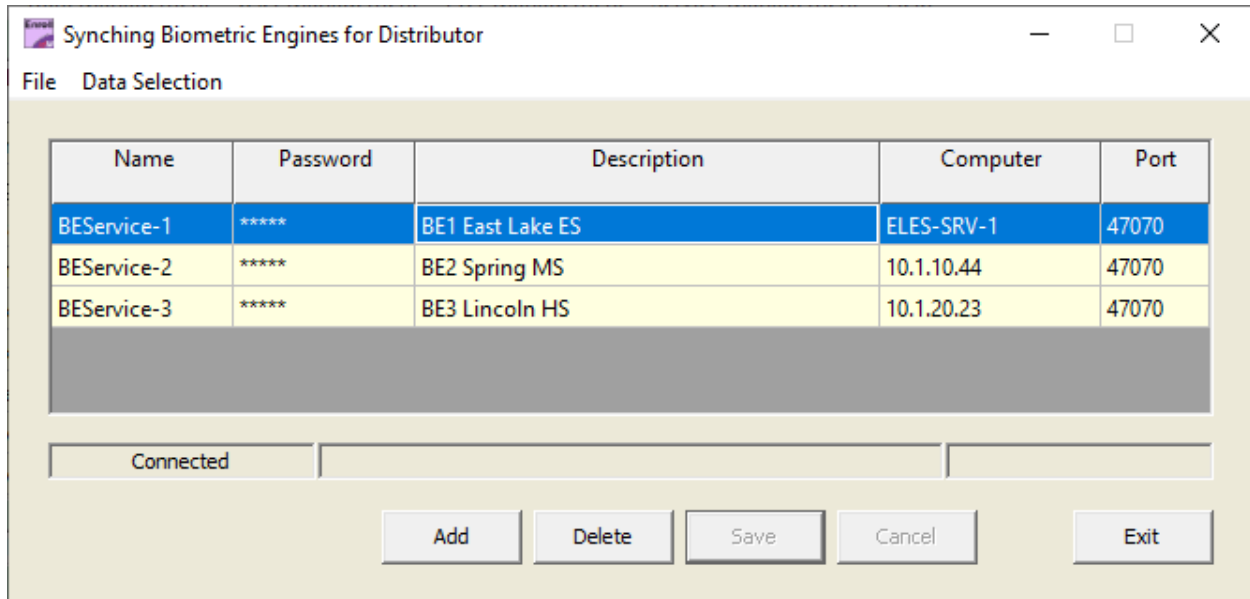
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Clicking on the **OK** button will save all changes and close the dialog. Clicking on **Cancel** will discard all changes and close the dialog.

Service Management | Syncing Biometric Engines...

This menu item is only available when connected to a Distributor and when the user's role is Administrator.

Selecting this function from the menu opens the Syncing Biometric Engines dialog.



This dialog enables you to set the following connection and authentication properties for each Biometric Engine the Distributor will synchronize with:

- **Name** – the name of the Biometric Engine as specified in its properties.
- **Password** – the password of the Biometric Engine as specified in its properties.
- **Description** – a description of the Biometric Engine to keep things straight.
- **Computer** – the address of the computer (name or IP Address) where the Biometric Engine is running.
- **Port** – the port that the Biometric Engine is listening on.

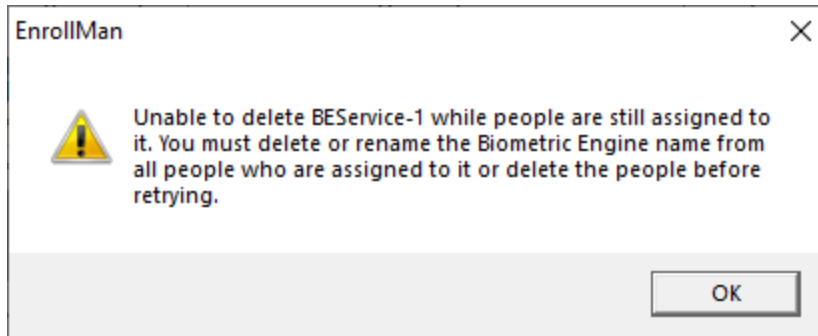
See the **Service Management | Properties...** section for information on setting the Name and Password on the service itself.

The example above shows the Distributor will be syncing with three Biometric Engines and uses the default names and passwords for Biometric Engines.

The **Add**, **Delete**, **Save** and **Cancel** buttons work the same as they do in the Enrollment grid. **Exit** closes the dialog.

However, deleting Biometric Engines has a few special considerations because changes to the enrollment records may have occurred that could be lost. To prevent this, this error message will be displayed if you try to delete a Biometric Engine from the list while there are people assigned to it.

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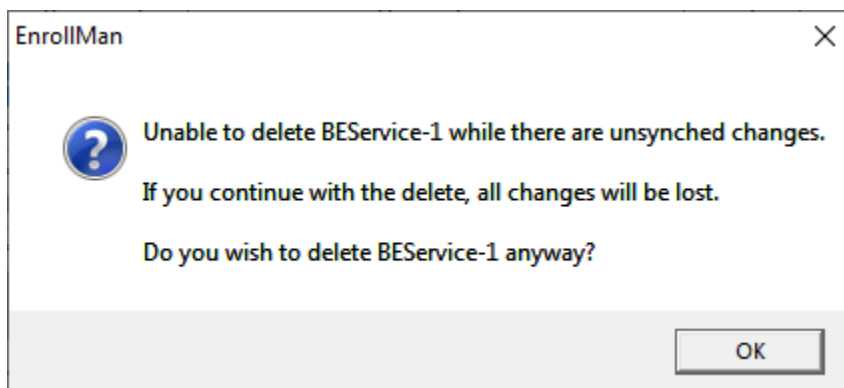


So, here are the steps for deleting a syncing Biometric Engine without losing any changes made on it: We will use 'BEService-3' as our example Biometric Engine.

1. Do NOT make any changes to any enrollment records that are assigned to 'BEService-3'. If you are using an import, remove the location 'BEService-3' from the imports. If you allow manual edits, notify all users not to make changes.
2. Modify all enrollment records that have 'BEService-3' in their Biometric Engine Names list by either removing the name or changing the name. You can only remove the name if a record has more than one name assigned to it. You must change if you want a record to be assigned to a different location. You can use the Find and Replace menu item to search for 'BEService-3' and change it to nothing (an empty 'Replace With' field) for a delete or to change it to another existing engine name.
3. Wait 2 synch cycles so that any changes made on the Distributor or Biometric Engine will be synched.
4. Delete the Biometric Engine record.

There are times when you know that the enrollment data on the Biometric Engine has not been changed, or the changes are not important, or you simply want to stop syncing with it.

Follow step 1, 2 and 4 from above and skip the synchs. Since the synch was skipped, the following message will be displayed when doing the delete.



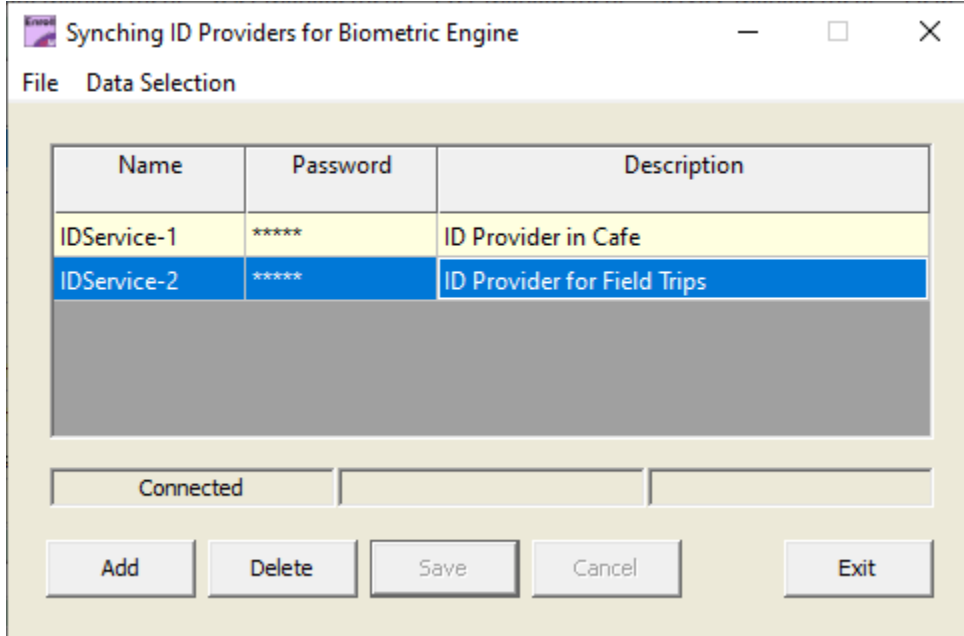
Click on **Yes** to complete the deletion or **No** to cancel

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Service Management | Syncing ID Providers...

This menu item is only visible when connected to a Biometric Engine and is only accessible when logged in as an Administrator.

Selecting this function from the menu will display the Syncing ID Providers dialog.



This dialog enables you to set the following authentication properties for each ID Providers the Biometric Engine will synchronize with:

- **Name** – the name of the Biometric Engine as specified in its properties.
- **Password** – the password of the Biometric Engine as specified in its properties.
- **Description** – a description of the Biometric Engine to keep things straight.

See the **Service Management | Properties...** section for information on setting the Name and Password on the service itself.

The example above uses the default name and password for an ID Provider.

The **Add**, **Delete**, **Save** and **Cancel** buttons work the same as they do in the Enrollment grid. **Exit** closes the dialog.

Service Management | Responses...

This menu item is only visible when connected to a Biometric Engine or an ID Provider and is only accessible when logged in as an Administrator.

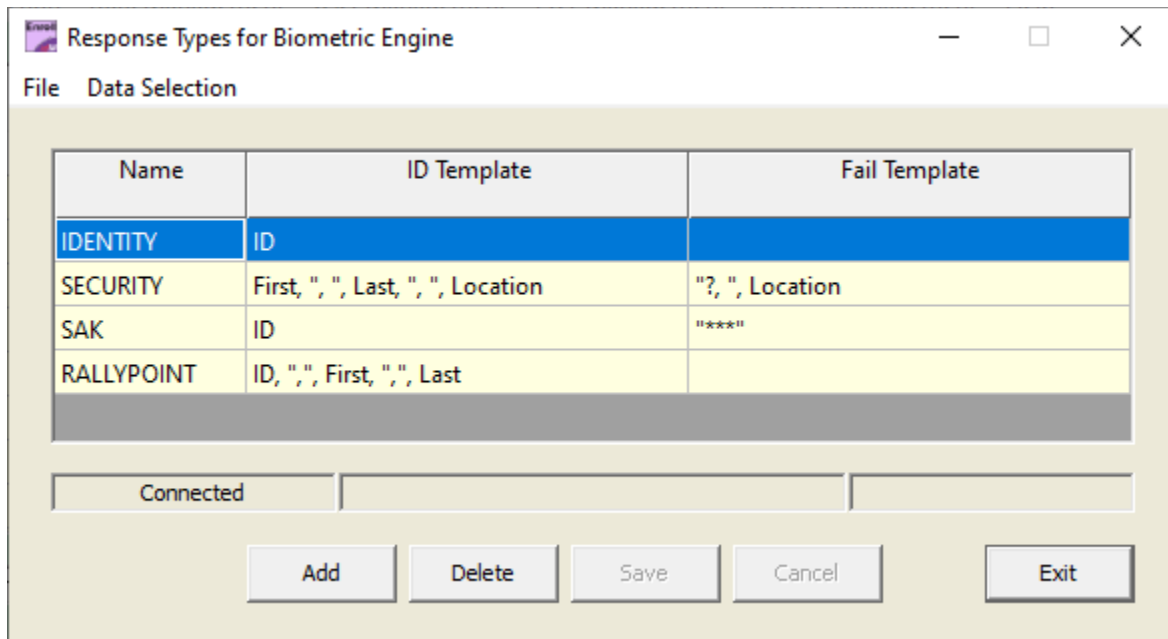
The Response Types grid enables you to modify existing response types and to create new ones. A Response Type defines a template that is used by the service to determine what value is returned to the Scan Manager when a finger is identified and when it fails. Once you have created a Response Type, its name is available to select in the Preferences dialog in the Scan Manager.

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The ID and Fail templates allow you to specify which fields and in what order you want to be returned to the Enrollment Manager for different situations. The fields available for templates are: **Last**, **First**, **Middle**, **ID**, **Level-1**, **Level-2**, **Location**, **Date**, **Time** and **YesNo**. You can also insert a fixed text field in the response by enclosing it in quotes. Use this to add separators between fields (a comma and space “, ” or a tab “/t”) or to add other special text.

There are several predefined Response Types, IDENTITY, SECURITY, SAK and RALLYPOINT you can use or you can create new ones and use them as examples. The Scan Manager uses the ID Response Type by default.

Selecting this function from the menu will open the Response Types grid.



The **Add**, **Delete**, **Save** and **Cancel** buttons work the same as they do in the Enrollment grid. **Exit** closes the Response Types grid.

Service Management / Options

This menu item is only accessible when logged in as an Administrator.

This menu item opens the Options grid and lets you modify the current settings that affect the behavior of the service. All of the options available through the Options grid can be set by modifying the service's property file. However, the property file is only read during startup and restarts. To make changes while the service is running, you will make them here.

After selecting this menu item you will see the Options grid. Here is how it looks expanded so you can see all of the options. The Option and Description columns are grayed out because they are read-only. This example shows the options available for a Biometric Engine with their default values.

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Options for Biometric Engine

File Data Selection

Option	Value	Description
Scheduled Backup - Run?	Yes	Specifies whether or not to run scheduled backups (Yes, No)
Scheduled Backup - Start Time	22:30	Start time for backup using 24 hour format (00:00 and 23:59)
Scheduled Backup - Interval Time	24:00	Time between backups using 24 hour format (00:01 and 24:00)
Scheduled Backup - Max Copies	5	The max number of backups saved
Scheduled Backup - Folder	./Backups/Scheduled/	Parent folder for all scheduled backups
Requested Backup Folder	./Backups/Requested	Parent folder for all requested backups
Scheduled Import - Run?	No	Specifies whether or not to run scheduled imports (Yes, No)
Scheduled Import - Start Time	00:30	Start time for import using 24 hour format (00:00 and 23:59)
Scheduled Import - Interval Time	24:00	Time between imports using 24 hour format (00:01 and 24:00)
Scheduled Import - Folder	./Imports	Folder that will contain the import file
Scheduled Import - File Name	autoimport.txt	Name of the import file
Scheduled Import - Layout	Last, First, Middle, ID, L...	Specifies which fields are to be read from the import file and in what order
Scheduled Import - Delimiter	TAB	The character used to delimit each field (TAB or COMMA)
Scheduled Import - Quoted Text?	No	Specifies whether or not each field is quoted (Yes, No)
Scheduled Import - Log Level	Detail	Specifies if import log is created and how much detail is written (Off, Summar...
Identification Log - Run?	No	Specifies whether or not to log identification activity (Yes, No)
Identification Log - Start Time	22:00	Start time for import using 24 hour format (00:00 and 23:59)
Identification Log - Interval Time	24:00	Time between imports using 24 hour format (00:01 and 24:00)
Identification Log - Folder	./Logs	Folder where the identification log files will be saved
Identification Log - File Name	identification.log	Name of the identification log file
Identification Log - Layout	Date, Time, YesNo, Loc...	Specifies which fields will be shown in identification log and in what order
Identification Log - Delimiter	COMMA_SPACE	The character(s) used to delimit each field (TAB, COMMA or COMMA_SPACE)
Identification Log - Show Fails?	No	Specifies whether or not to log a failed identification (Yes, No)
Client Connection Port	47073	Port number clients use to connect to service
Emailer - SMTP Host Name	mail.smtp2go.com:2525	Specifies the SMTP host to use when sending e-mail notifications
Emailer - SMTP Host User Name	identiMetrics	Specifies the user name for connecting to the SMTP host (optional)
Emailer - SMTP Host Password	*****	Specifies the password for connecting to the SMTP host (optional)
Emailer - Senders E-mail Address	idM-Service@customer...	Specifies the e-mail address to use as the Sender
Database Folder	C:/Users/Public/Docu...	The folder where the database is located. Requires a restart.
Message Logging Level	information	Level of detail for the messages logged by the service (information, debug, tra...
License Warning Days	15	When the license has this number of days left, issue a warning
Enrollment Count Warning Percentage	10	If the percentage of available enrollments falls below this value, issue a warning
Scheduled Compact - Run?	Yes	Specifies whether or not to run scheduled compact (Yes, No)
Scheduled Compact - Start Time	23:00	Start time for compact using 24 hour format (00:00 and 23:59)
Scheduled Compact - Interval Time	24:00	Time between compacts using 24 hour format (00:01 and 24:00)
Scheduled Compact - Keep Backup?	No	Compact creates a backup. Do you want to keep it if compact is successful? (...)

Connected

Save Cancel Exit

Edit the value of the option you wish to change and click on the **Save** button. After a change has been made you can click on the **Cancel** button to undo the change. Click on the **Exit** button the close the dialog. If you have made any changes, the service will restart any affected tasks so the change will be immediate.

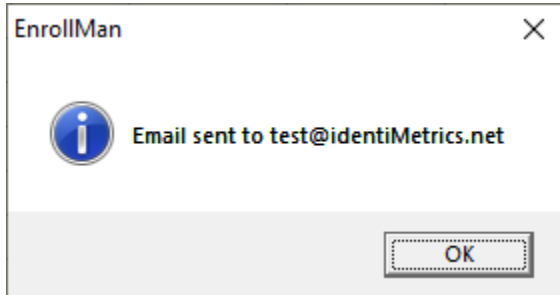
The Options are described in detail in the [identiMetrics Services Guide](#) document.

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Service Management | Send Test Email

This menu item is only accessible when logged in as an Administrator.

This function uses the values of the **SMTP** options to send an email to all users that have an Administrator role or Manager role and have provided an email address in their User Profile. The email will have a subject of 'Test Email from Your identiMetrics System'. If the email is sent successfully, the following message will be displayed.



If an error occurs, a message will be displayed to help you to make the appropriate changes to your settings.

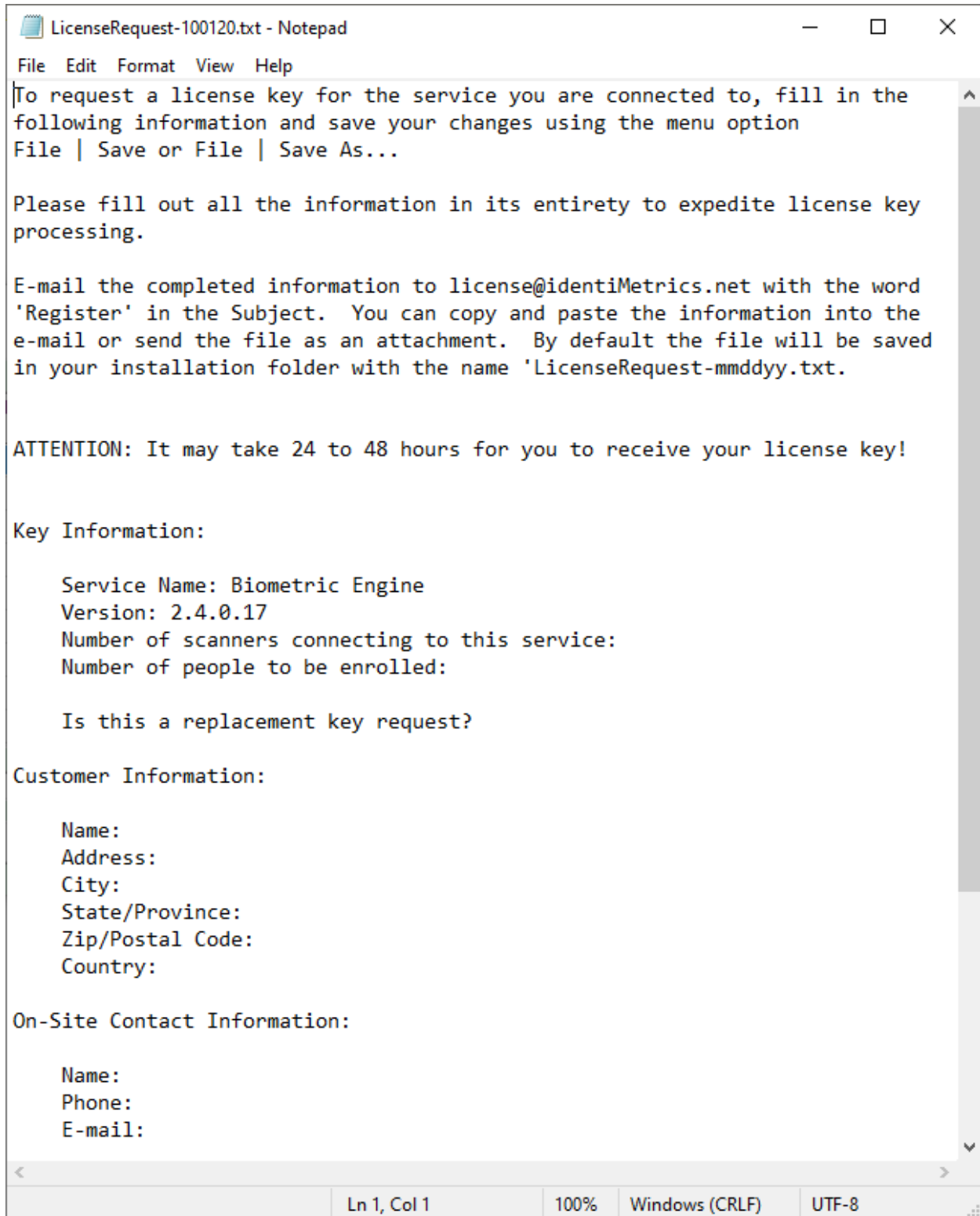
Service Management | Generate License Request

This menu item is only accessible when logged in as an Administrator.

This function generates a text file with a key request form and then opens it in Notepad. Follow the instructions listed at the top of the form and a key will be returned within the time frame specified. See the **Service Management | Enter License...** section for information on entering the key.

Here is an example of the request file.

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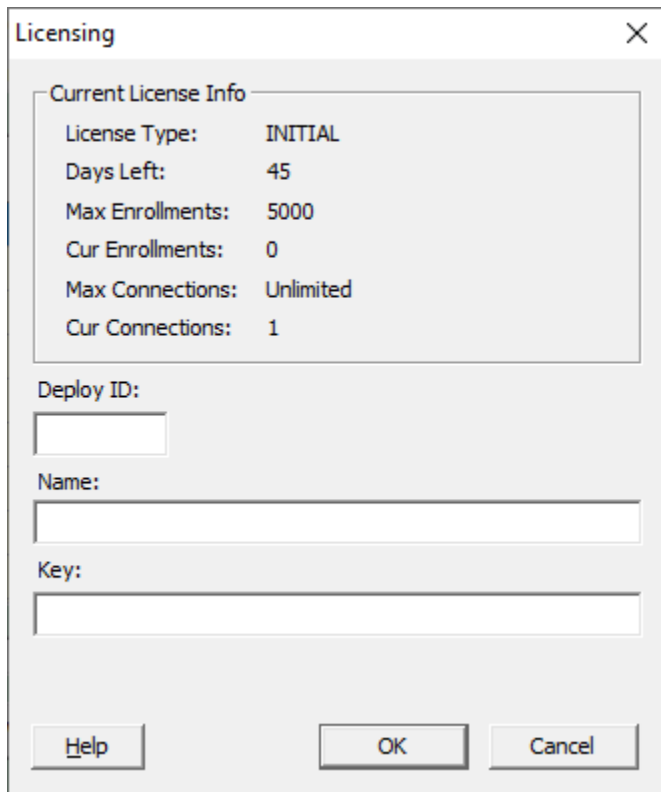


Service Management | Enter License...

This menu item is only accessible when logged in as an Administrator.

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This menu item launches the Licensing dialog and where you will enter the licensing information provided by identiMetrics. See the **Service Management | Generate Key Request** section for information on requesting a key.



Current License Info	
License Type:	INITIAL
Days Left:	45
Max Enrollments:	5000
Cur Enrollments:	0
Max Connections:	Unlimited
Cur Connections:	1

Deploy ID:

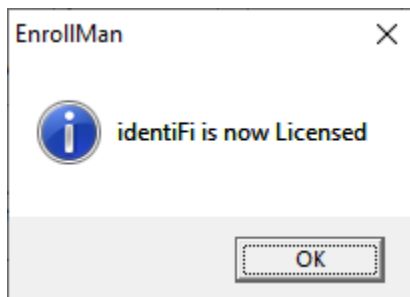
Name:

Key:

Buttons: Help, OK, Cancel

Copy and paste the information sent to you in the appropriate fields and click on **OK**. All fields are required. Click on **Cancel** to close the dialog and do not send anything to the service.

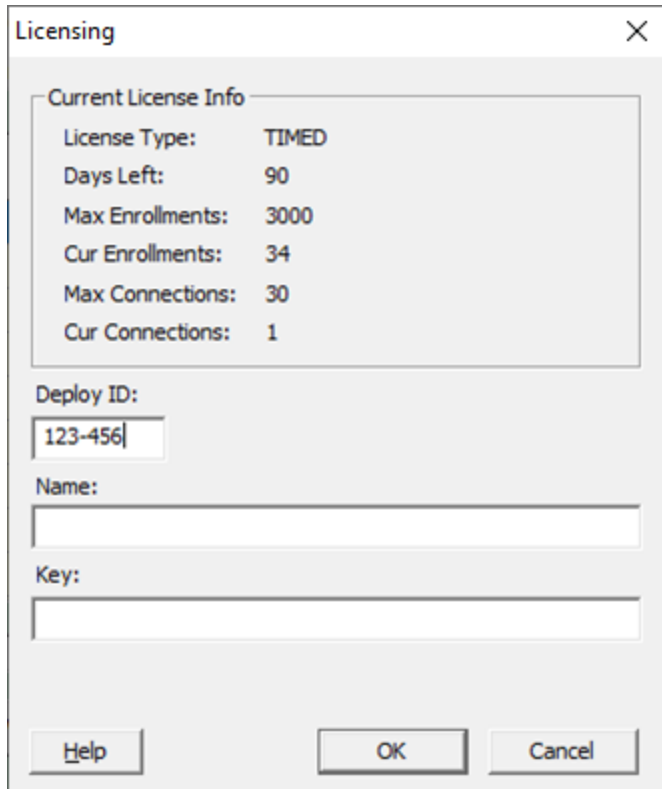
Once the license information has been processed successfully, you'll see the following confirmation message



Click on **OK** to return to the Enrollment grid.

You can select the **Enter License...** menu item at any time to check on the status of your key. In the example here your TIMED key has 90 **Days Left**, you have used 34 of 3000 possible enrollments and there is currently only one connection to the service out of a possible 30.

Enrollment Manager Guide



Help / Contents

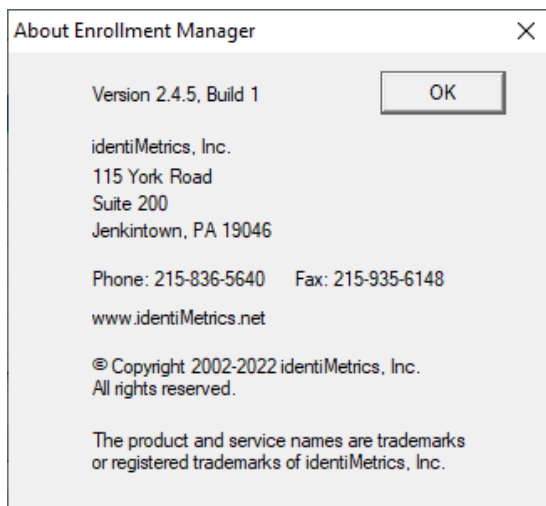
This menu item opens the Enrollment Manager Help page in your default browser.

Help / www.GOidM.com

This menu item opens the identiMetrics Resource Center website in your default browser.

Help / About Enrollment Manager

This menu item displays the About Enrollment Manager dialog.



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Property File

The *EnrollMan.properties* property file contains the properties used to customize the Enrollment Manager to run correctly in your environment. Some of the properties can be modified in an easier manor by using the Preferences dialog as described in the appropriate sections. You can also view and edit the file in a text editor. The file can be found in the installation folder.

Here is a list of the available properties with a short description of each.

- **Enrollment Manager.location** – Specifies the name of the location. Defaults to “EM-1”.
- **export.default.layout** – Specifies which fields and in what order those fields will be exported. Defaults to “Last, First, Middle, ID, Level-1, Level-2”.
- **import.default.layout** – Species which fields and in what order those fields will be imported. Defaults to “Last, First, Middle, ID, Level-1, Level-2”.
- **scanner.displaylist** – Specifies the scanner names that will appear in the Type dropdown in the Scanner section of the Preferences dialog. When not specified, the default is FUTRONIC and SECUGEN.
- **scanner.lightbar.devicenum** – This number provides a way to specify which light bar you are using if you have more than one. The default value is 1.
- **scanner.type** – Specifies the type of scanner that will be connected. Can be set to any scanner name in the display list and the default is FUTRONIC.
- **scanner.address** – Specifies the IP address of the Futronic Ethernet Scanner when scanner type is set to FTR-ETHERNET. This is initially not provided.
- **server.address** – Specifies the address of the service to connect to. Can be specified in standard TCP/IP dot notation or can be the name of the computer. The default is “localhost” which is the standard “name” of the computer you are on.
- **server.port** – Specifies the port that the service is listening on. A Biometric Engine normally listens on 47070 and an ID Provider normally listens on 47080. The default is 47070.
- **sounds.identified.soundfile** – Specifies the name of the .WAV file to play when a successful identification response is returned. The default is *sounds/identified/standard/chime1.wav*.
- **sounds.notfound.soundfile** - Specifies the name of the .WAV file to play when a failed identification response is returned. The default is *sounds/notfound/buzz1.wav*.
- **sounds.scanned.soundfile** - Specifies the name of the .WAV file to play when the program successfully scans the finger. The default is *sounds/scanned/beep1.wav*.
- **sounds.type** – Specifies the type of sound generated for various scanning events. Can be set to WAV, BEEP, REMOTE or OFF and is set to WAV by default.

WAV - Plays .wav files.

BEEP - Generates Beeps.

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REMOTE - Plays sounds through remote Scanner.

OFF - Turns off all sounds (only available in the property file).

- **window.background** – Specifies the color of the background. Can be TAN, GRAY, YELLOW, BLUE, GREEN, BLUE_GREEN or WHITE. GREEN is the default.
- **logging.channels.c1.archive** – Internal, do not change.
- **logging.channels.c1.class** - Internal, do not change.
- **logging.channels.c1.formatter** - Internal, do not change.
- **logging.channels.c1.path** – Specifies the name of the log file. Defaults to IdEnrollment Manager.log.
- **logging.channels.c1.purgeCount** – Specifies the number of rotating log files. The default is 2.
- **logging.channels.c1.rotation** – Specifies the size of each rotating log file. The default is 500K.
- **logging.formatters.f1.class** - Internal, do not change.
- **logging.formatters.f1.pattern** - Internal, do not change.
- **logging.formatters.f1.times** - Internal, do not change.
- **logging.loggers.app.channel** - Internal, do not change.
- **logging.loggers.app.level** – Specifies the amount of detail in the log file. Can be error, information, debug and trace and defaults to information.
- **logging.loggers.app.name** - Internal, do not change.

This table shows the relationship between V2 Preferences, V2 Properties and V1 parameters.

Preferences	Properties	Version 1.x Parameters
Location	Enrollment Manager.location	LocationName
	export.default.layout	
	import.default.layout	
Type	scanner.type	ScannerType
	scanner.displaylist	
Computer	service.address	
Port	service.port	UDPPort
	sounds.identified.soundfile	FingerIdentifiedSoundFile
Sound for a Failed Scan	sounds.notfound.soundfile	FingerNotFoundSoundFile
Sound when Scanned	sounds.scanned.soundfile	FingerScannedSoundFile
Type	sounds.type	Sounds
Background	window.background	Background
	logging.channels.c1.archive	
	logging.channels.c1.class	
	logging.channels.c1.formatter	
	logging.channels.c1.path	
	logging.channels.c1.purgeCount	
	logging.channels.c1.rotation	
	logging.formatters.f1.class	
	logging.formatters.f1.pattern	
	logging.formatters.f1.times	

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Preferences	Properties	Version 1.x Parameters
	logging.loggers.app.channel	
	logging.loggers.app.level	
	logging.loggers.app.name	

What is Installed?

Files

The files that are installed with the Enrollment Managers are organized into two groups, Installation files and Application files. Installation files are files that can be created or modified by the user or the application such as property files, log files and sound files. The Application files are files that cannot be modified and includes the executables themselves.

The Installation files are installed in the following folder by default:

C:\Users\Public\Documents\identiMetrics

However, you can select a folder of your own. Make sure all users have write access to the folder you choose.

The Application files are always installed in the following folder:

32 Bit OS: C:\Program files\identiMetrics

64 Bit OS: C:\Program files (x86)\identiMetrics

Here is a description of the Installation files and related folders:

EnrollMan.properties – This text file contains the configuration settings for the Enrollment Manager.

EnrollMan -Default.properties – This text file is a copy of the *EnrollMan.properties* file and is available so can review the original installed settings.

EnrollMan.log – This text file contains the execution log for the Enrollment Manager. In general you don't have to look at this but it can be very helpful when tracking down a problem.

Docs – This folder contains the installation, user and troubleshooting guides.

Sounds – This folder contains a collection of custom sound files that are used by the Enrollment Managers to indicate a successful scan, a successful identification or a failed identification.

Here is a list of the Application files and related folders:

EnrollMan.exe – The Enrollment Manager application.

Drivers – This folder contains the files needed to install the device drivers for the many scanners that we support.

Utilities – This folder contains additional files and programs.

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Shortcuts



The **Enrollment Manager** shortcut can be found in the **Start | All Programs | identiMetrics** program folder and on the Desktop.