card@once®

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Version 12.2

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USER GUIDE OVERVIEW

The Card@Once® Symitar Episys® integrated solution produces instant issued cards straight from Episys®, using communication between an Episys® PowerOn specfile, a Tomcat server, and the Card@Once® web service. The user can submit a card print or PIN request directly from Episys® Quest.

The purpose of this document is to be utilized with the training of end users on the integrated solution's functions and features. A demo video of the integration is also available for those who would like to utilize it or incorporate it into training for users. Please ask a Card@Once® representative for more details if interested.

PRE-REQUISITE STEPS

The first step prior to utilizing the Episys® integration to Card@Once® is to complete the setup of the Apache Tomcat server, and Power On installation as detailed in the Card@Once® Symitar Episys® Integration Technical Installation Guide. Please validate with internal technical and networking teams that the integration installation has been completed prior to attempting print or PIN activity.

Please note: programming setup must be completed by Card@Once® prior to print and PIN availability as well. If unsure of the status of the installation or the programming completion, please engage the appropriate internal project lead resources and/or a Card@Once® project manager for guidance.

LAUNCHING THE CARD@ONCE® INTEGRATION

In order to utilize the Card@Once® integration with Episys®, a user will need at minimum privileges Card Access Revision and Account File Maintenance. These are defined in the User Control module by user. More information on user access can be found on page 15.

To start the process, one must first select a cardholder account that should be used for printing or pinning. At least one card record should exist on the account loaded before starting the process. If one does not exist, the process of creating a card within Episys® should be followed.

From an account within Teller Transactions or Account Manager, the user can directly launch the Card@Once® Card Printing process by selecting CARDPRINTING.XXX from the Specfile Drop-Down. *Please note-the CARDPRINTING.XXX will be renamed at the time of installation, and will likely end with an institution id instead of 'xxx.'*
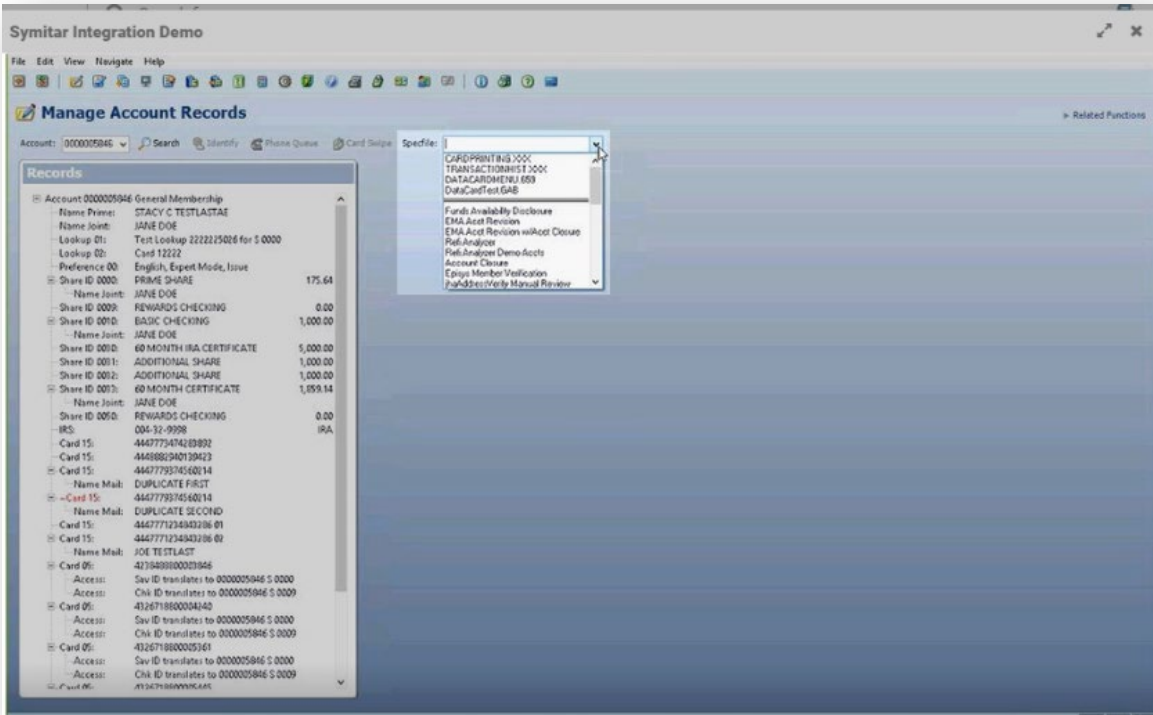
Once launched, a screen similar to the below will be available. Options may vary as well as 'look' of the screen may vary per institution. Below is an overview of the various options that may be seen.

1. **Printer Status**- shows the current status of the selected Card@Once® printer
2. **Process Status**- shows the status of the current job while processing; also displays any error messages should a request fail
3. **Card drop-down**- contains the list of cards available for printing on a cardholder account
4. **Printer drop-down**- displays only if multiple printers are defined-otherwise, will default printer selection by branch affiliation without displaying a drop-down option
5. **Name field**- cardholder name to be printed on the card; based on the name type on the card record. If the name type is 0-it will be the primary name. If the name type is 1-it will be the first joint name on the account level. If the name type is 2- a separate name record will be displayed under the card record.
6. **Name 2 field**- second name to be printed on the card; comes from the Extra Emboss Line on the card record
7. **Expiration Date field**- current expiration date for the selected card record
8. **Offset field**- current PIN offset for a card record; must be filled for Print only attempts, but may be blank if prior to Card@Once® PIN pad usage (PIN Only or PIN & Print requests)
9. **PIN Only**- allows for re-pinning of a card without printing a new plastic
10. **PIN & Print**- allows for cardholder to select custom PIN on Card@Once® PIN pad device as well as print the card on the Card@Once® selected printer
11. **Print**- allows for a card to be printed with existing PIN offset
12. **Cancel**- allows for the process to be cancelled with no changes saved
13. **Background field**- image ID for selected image as Card@Once® identifies it
14. **Background selection**- displays available image options for a given card

RUNNING THE CARD@ONCE® INTEGRATION

The Card@Once® Symitar® integration offers three options for issuance: PIN & Print, Print Only, and PIN Only. All options will be discussed below, however, available choices, processes, and procedures may vary slightly dependent on the institution.

PIN Only

The PIN Only function is used for cards which only need a PIN update. This function will not warrant a print request. In order to utilize this option, an institution must have supported Card@Once® PIN pads installed at the workstation being utilized. *Please note: version 12.2 of the Symitar integration is required to support Card@Once IDtech and Magtek PIN pad devices. Previous versions will only support Card@Once Magtek PIN pad devices.* This will only change the PIN offset value in Episys®-it will not change the PIN offset encoded on the plastic.

In order to perform this function, follow the below steps:

1. Upon launching the CARDPRINTING spec file, the user should first select the card they want to PIN.
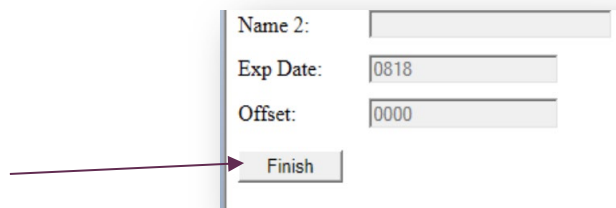

Select the desired Card to PIN from the drop-down menu.
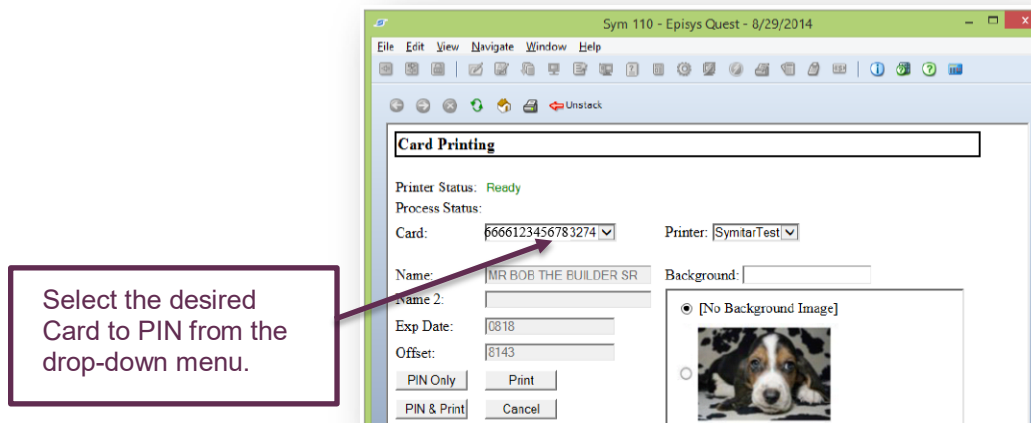
2. Select the PIN Only button.
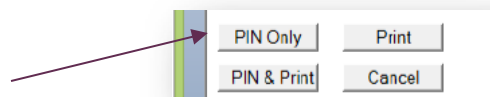
3. Once selected, a command request will be sent to the PIN pad. The PIN pad will change from a "Welcome" screen to "Enter PIN" as shown below.

4. At this time, the cardholder should enter the PIN they would like to use with selected card, hitting the green arrow button to Enter. The PIN pad will then ask the cardholder to Re-Enter the PIN to validate the desired PIN entered.

5. After the PIN has been selected, Episys® will send the request to Card@Once® for calculation. Once the new PIN offset has been calculated and returned to Episys®, a Finish button will be displayed and should be selected in order to complete the process.

6. Once the Finish button is selected, the user will see the following message to close out the process:
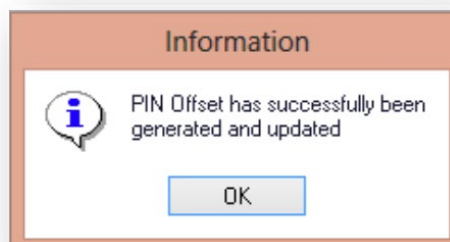
Print

The Print function is typically used for re-printing of issued cards (for example damaged cards), or printing of cards where a PIN offset has already been identified. *Please note, this will not prompt for pinning of the card, and will print it as the information is displayed on the card record in the CARDPRINTING file. If an Offset does not exist on the card, one must be manually entered in order to use this process. For printing a card that should first be pinned with the Card@Once® PIN pads, please see the PIN & Print section.*

In order to perform this function, follow the below steps:

1. Upon launching the CARDPRINTING spec file, the user should first select the card they want to print from the Card drop-down. If the Printer drop-down is available, the appropriate printer should be selected at this time. *Please note: A Printer drop-down menu will only appear if the user has access to multiple printers in Episys®. If no printer drop-down is present, a defaulted printer for the user's branch will be utilized.* It is advisable to check the Printer's Status to validate it is Ready to print at this time. In the event the Printer Status reflects an error, troubleshooting should be attempted prior to submission of the print request.

2. If the institution partakes in color image printing, available images for printing will be displayed in the box below the Background field. The desired image should be selected at this time. If the institution does not partake in color print services, the [No Background Image] option should stay selected.
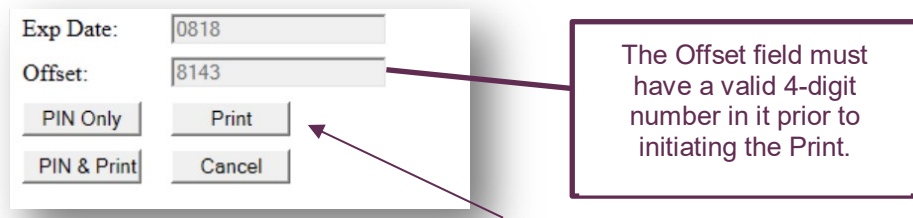

Validate the selected printer is Ready for a print job.

Select printer to receive print job from drop-down menu (if available).

Select the desired card to issue from the drop-down menu.

Select image to print on card. If no images are available, select [No Background Image].

3. At this time, validate an Offset is present in the Offset field prior to submitting the request. If no value is present, one must manually be entered prior to the print attempt. Once ready, the Print button may be selected.
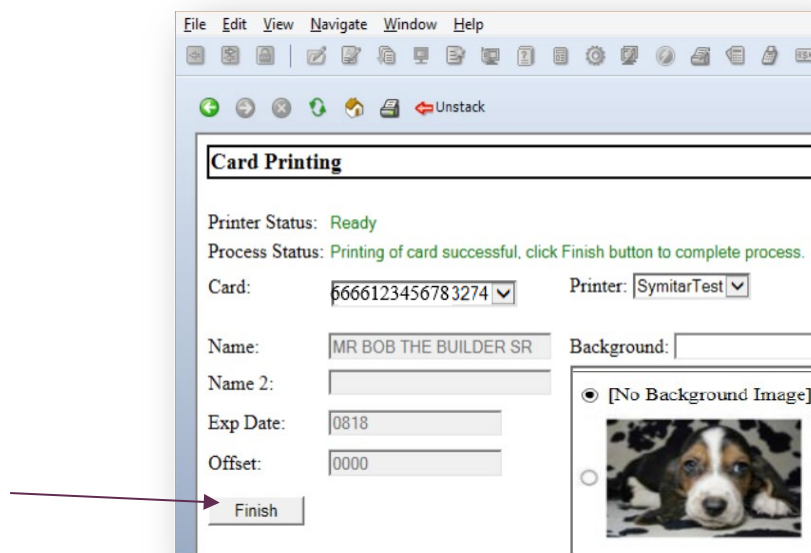

The Offset field must have a valid 4-digit number in it prior to initiating the Print.

4. Episys® will send the request to Card@Once® for processing. Once the request has been submitted, the user will see the status of the card print in the Process Status field.


5. Upon successful print completion of the print job, the user will be presented with the Finish button, which should be clicked. Once selected, the necessary file maintenance to the card record will be completed.

6. After the Finish button has been selected, the below box will pop-up denoting the card was successfully issued, printed, and activated (if applicable). If specified for the institution, a card note will also be created at this time. The interface will close once the OK button has been selected.
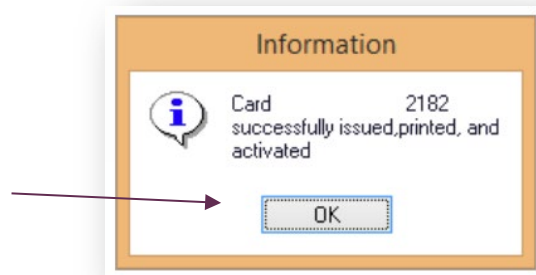
PIN & Print

The PIN & Print function is the most frequently used of the three available options as it allows the cardholder to select a custom PIN prior to printing the card. This function may only be used in conjunction with supported Card@Once® PIN pads. *Please note: version 12.2 of the Symitar integration is required to support Card@Once IDtech and Magtek PIN pad devices. Previous versions will only support Card@Once Magtek PIN pad devices.*

In order to perform this function, follow the below steps:

1. Upon launching the CARDPRINTING spec file, the user should first select the card they want to print from the Card drop-down. If the Printer drop-down is available, the appropriate printer should be selected at this time. *Please note: a Printer drop-down menu will only appear if the user has access to multiple printers in Episys®. If no printer drop-down is present, a defaulted printer for the user's branch will be utilized.* It is advisable to check the Printer's Status to validate it is Ready to print at this time. In the event the Printer Status reflects an error, troubleshooting should be attempted prior to submission of the print request.

2. If the institution partakes in color image printing, available images for printing will be displayed in the box below the Background field. The desired image should be selected at this time. If the institution does not utilize color print services, the [No Background Image] option should stay selected.

Validate the selected printer is Ready for a print job.
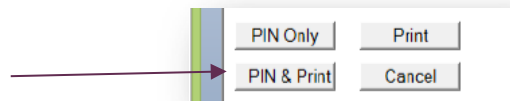
Select the desired card to issue from the drop-down menu.

Select image to print on card. If no images are available, select [No Background Image]

Select printer to receive print job from drop-down menu (if available).

3. Once ready, select the PIN & Print button.

4. Once selected a command request will be sent to the PIN pad. The PIN pad will change from a "Welcome" screen to say "Enter PIN" as shown below.

5. At this time, the cardholder should enter the PIN they would like to use with selected card, hitting the green arrow button to Enter. The PIN pad will then ask the cardholder to Re-Enter the PIN to validate the desired PIN entered.

6. Episys® will send the request to Card@Once® for processing, and Card@Once® will return a valid Offset for storage in Episys® as well as initiate the print request. Once the request has been submitted, the user will see the status of the card print in the Process Status field.
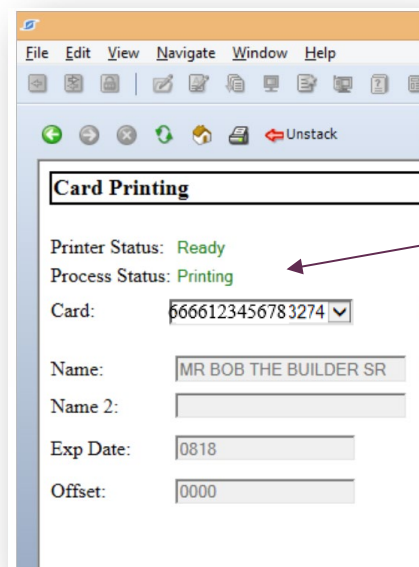
7. Upon successful completion of the print job, the user will be presented with the Finish button, which should be clicked. Once selected, the necessary file maintenance to the card record will be completed.
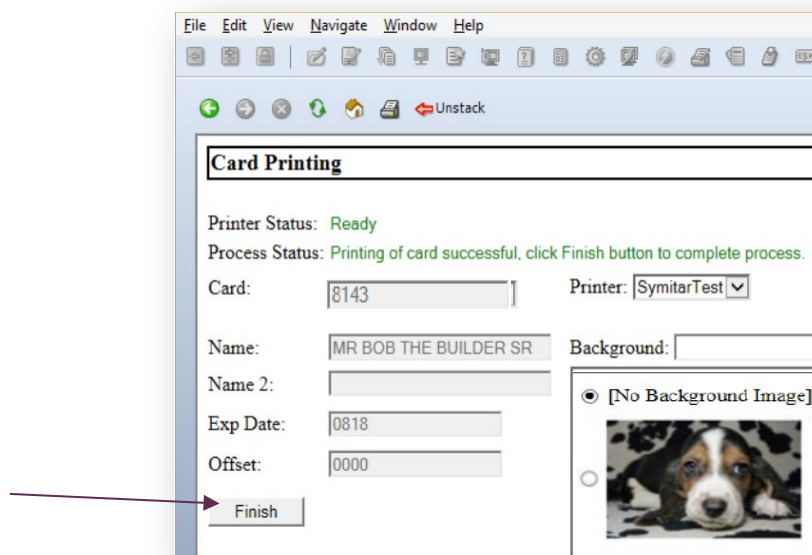
8. After the Finish button has been selected, the below box should pop-up denoting the card was successfully issued, printed, and activated (if applicable). If specified for the institution, a card note will also be created at this time. The interface will close once the OK button has been selected.
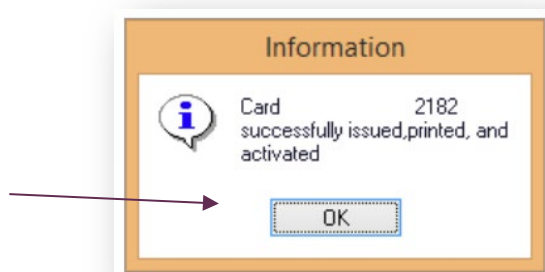
Card Activation (optional)

Card@Once® offers real-time card activation with select transaction processors. If an institution has this functionality enabled with Card@O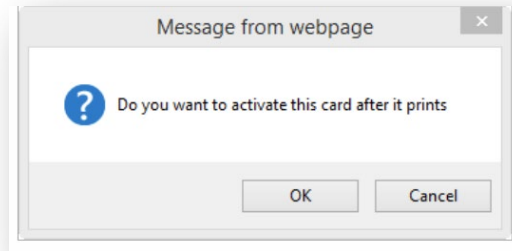nce®, a confirmation message will be displayed when the Print or PIN & Print buttons are selected. If the card should be immediately activated, select the OK button.

Once the card has printed, Episys® will notify Card@Once® to activate it. From there, Card@Once® will attempt activation with appropriate transaction processor. Upon successful activation, a Success message will be returned back to the end user in Episys®. Once activated, the Finish button will be displayed and should be selected in order to complete the process.

If utilizing activation on PIN only attempts, an automatic attempt will be sent from Episys® to Card@Once® in order to update the PIN offset information at the transaction processor.

Please note, the card record may need to previously exist at the processor in order to update it.

CARD RECORD FILE MAINTENANCE

Once a card has been successfully instant issued, the following fields will be updated in the card record file maintenance as listed below.

Please note, Card@Once® does not have the ability to alter the fields or the values automatically updated. If modification to the below fields or values is needed, assistance by Symitar® may be required, and customization charges may apply.

PIN & Print or Print updates:
- Card Status field- set to 1 (indicating Issued)
- Instant Issue field- set to 1
- PIN Offset field- updated to new PIN offset (if PIN & Print was used)
- Effective Date field- set to system date
- Image Reference Number field- set to background image ID (if color printing is utilized)

PIN Only updates:
- PIN Offset field- updated to new PIN offset

PIN & Print or Print with activation enabled:
- Card Status field- set to 1 (indicating Issued)
- Instant Issue field- set to 1
- PIN Offset field- updated to new PIN offset (if PIN & Print was used)
- Effective Date field- set to system date
- Image Reference Number field- set to background image ID (if color printing is utilized)
- Activation Date- set to system date

USER SETUP & TOOLS

In order to setup users for use with the Symitar®/Card@Once® integration, one must launch the admin tool (CARDPRINTING.ADMIN). At the time of installation, the user installing the integration will be automatically added and given permissions to all functions and features. This user will need to add any additional users who should have access and control to any of the below admin functions:

- **Update Card@Once® User Access List** – allows user to add/delete other users and update their permissions.
- **Update Printer Definition** – allows user to define/update the printer definition for the branch in which they are located.
- **Update API Key** – allows user to define/update the API Key provided by CPI for access to their web services. *Will need Security Token Admin access at Card@Once® in order to generate an API Key.*
- **Update Background Images** – allows user to update the image file used for display of images available to print as backgrounds.
- **Order Stock Inventory** – allows user to order card stock inventory for a given branch.
- **Update Stock Inventory** – allows user to update stock inventory count quantities for a given branch.
- **Edit Auto Order Threshold** – allows user to edit the Auto Order Threshold quantities for cardstock minimums and reorder amounts.
- **Get Inventory For This Printer** – allows user to retrieve inventory for a given branch.

USER ACCESS LIST

Additional users must be added manually in order to use the Symitar® integration. A user with User Access List permissions will need to initiate this process by selecting the New button. A blank box will appear. The user's 4-digit user number should be entered into this field, including leading zeroes. Then, the Add button should be selected as seen below.

Enter 4-digit user number here.

Select Add to add the user to the Access List table.

Once the new user has been added to the row, permissions should be selected based on access the institution wants them to have. This may be done by clicking on the boxes of the desired permissions. A description of the various permissions is provided below. Once done adding users and/or permissions, select Submit to complete the process.

Card@Once Client Application Admin

User	Can PIN	Can Print	Image Upd	Key Upd	Upd Printer	Edit Thresh	Get Inv	Upd Stk	Order Stk	User Upd
○ 0000	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑
○ 0001	☑	☐	☐	☐	☐	☐	☐	☐	☐	☐
○ 0002	☑	☐	☐	☐	☐	☐	☑	☐	☐	☐
○ 0003	☑	☑	☐	☐	☐	☐	☑	☐	☑	☑
○ 0004	☐	☐	☐	☑	☑	☐	☐	☐	☐	☐
○ 0005	☐	☐	☑	☐	☑	☐	☐	☐	☐	☐

New   Delete   Submit   Cancel

- **Can PIN**- access to use PIN Only function (if applicable)
- **Can Print**- access to use Print and Print & PIN functions (if applicable)
- **Image Upd**- access to Update Background Images in the Admin Tool (if applicable)
- **Key Upd**- access to Update API Key in Admin Tool
- **Upd Printer**- access to Update Printer Definition in Admin Tool
- **Edit Thresh**- access to Edit Auto Order Threshold in Admin Tool
- **Get Inv**- access to Get Inventory for printer in Admin Tool
- **Upd Stk**- access to modify stock quantities in Update Stock Inventory in Admin Tool
- **Order Stk**- access to order cardstock in Order Stock Inventory in Admin Tool
- **User Upd**- access to add/delete/modify users in User Access List in Admin Tool

Users may be deleted by selecting the user's radio button, selecting Delete, then Submit. If Submit is not selected, changes will not be saved.

The list of users and their permissions are stored in a file called CARDPRINTING.USERS in the Data Files folder in Quest. This can only be accessed by PC Transfer.

UPDATE PRINTER DEFINITION

The printer definition will need to be ran at each branch with a Card@Once® printer so that the unique branch printer(s) will be properly defined in the system. Running this for the purpose of adding a printer, or updating an existing printer name may be done by simply selecting the radio button beside Update Printer Definition. A field will be displayed which the printer name should be entered into IDENTICALLY as it was provided by Card@Once®. Printer names are case-sensitive, and will not work if not appropriately defined. If unsure of this value, please engage Card@Once® for verification, otherwise, this information should have been provided on the Symitar Episys® Card@Once® Integration Checklist.

Please note: if entering multiple printer names for a single location, the names should be separated by a comma. They will be displayed in the printer drop-down menu in the same order as entered here.

Card@Once Client Application Admin

Select	Action
○	Update Card@Once User Access List
●	Update Printer Definition
○	Update API Key
○	Update Background Images
○	Order Stock Inventory
○	Update Stock Inventory
○	Edit Auto Order Threshold
○	Get Inventory For This Printer

If defining more than one printer
separate them with commas

Printer: _____

SUBMIT   QUIT

UPDATE API KEY

The API Key is used to validate the interaction to Card@Once® is coming from a trusted source. A valid key is required for communication to work. Keys remain valid for 90 days and may be generated in the Card@Once® Web Portal by a Security Token Admin. Instructions on generating a security token may be found in the Card@Once® Symitar Episys® Integration Technical Installation Guide.

Once a valid key/token has been obtained in the Card@Once® Web Portal, it may be added to the Admin tool by selecting Update API Key and simply copying/pasting the 32-digit key into the Key field, and selecting Submit.

UPDATE BACKGROUND IMAGES

The Update Background Image option is only necessary if an institution is using color printing. If images are not being printed on cards as they are being personalized, this function should not be used.

This function will pull all available images within Card@Once® for an institution's use within Episys®. Similar to the printer definition setup, this will need to be completed initially at each branch, and will need to be done periodically to add or remove image options as they are modified at Card@Once®. Once selected and submitted, the images will update appropriately.

Please note-if using Bin/Image Pairing, additional configuration may be necessary by IT personnel in order to update and use new images. Please validate internally prior to selecting this option. Additional details on Bin/Image pairing may be found in the Card@Once® Symitar Episys® Integration Technical Installation Guide

ORDER STOCK INVENTORY

Cardstock may be ordered manually through the Order Stock Inventory option if the stock is being housed/purchased through Card@Once®. In order to do this, the user must first select the Order Stock Inventory option. Select the appropriate printer and cardtype, then key in the desired quantity to be ordered. A reason must be selected as well. If no reasons apply, select "Other." Then select Submit.

UPDATE STOCK INVENTORY

Update Stock Inventory should be used in the event an institution needs to make a manual adjustment to the stock quantities on-hand. Similar to the Order Stock Inventory option, the printer and card type requiring adjustment should be selected. If deducting stock quantities enter a dash (-) before the integer (example: -10). If adding stock quantities enter the number to add 'as is' (example: 10). Finally, select the Reason for the adjustment. Submit.

EDIT AUTO ORDER THRESHOLD

Using the Edit Auto Order Threshold will allow setup and modification of automatic cardstock orders through Card@Once®. This will monitor the system's cardstock counts at a given branch and ship a reorder amount of stock once a trigger level is met. In order to set this up, select the printer and cardtype to be used. The Trigger Level is the amount of stock a branch should sink to in order to prompt additional stock shipments. The Reorder Amount is the quantity of stock that should be shipped once the trigger is reached.

For example, if a trigger level is set to 50 and reorder amount is set to 100, once the branch's inventory of stock is 50 or less, Card@Once® will be prompted to ship an additional 100 cards to that branch for usage.

Once these levels are defined, select Submit to setup. These levels may be updated should trigger or reorder quantities need to be adjusted.

GET INVENTORY FOR THIS PRINTER

The Get Inventory option may be used to validate existing quantities of stock as well as reorder/threshold points. This may be generated by selecting the desired printer, and clicking Submit. Once selected, an Internet Explorer window will launch with the inventory quantities listed inside it.

TROUBLESHOOTING AND FREQUENTLY ASKED QUESTIONS

Printing and Pinning

Question: When attempting to print or PIN, "Error:403" is displayed. How can this be fixed?

Answer: "Error 403" is caused by one of two issues, but essentially indicates that Card@Once® is unable to validate the requests due to invalid printer name or API key/security token. If the printer name has previously been used without issue, please validate that the Security Token issued in the Card@Once® Web Portal has not expired. Additional details on technical troubleshooting of this issue may be found in the Card@Once® Symitar Episys® Integration Technical Installation Guide.

Question: When attempting to print a card, a "System Busy" message was displayed. What does this mean?

Answer: This message is returned when the PIN pad has been disconnected or is no longer connected with the application. Validate that the PIN pad device is physically plugged into the workstation and try again. If this issue persists, have a workstation administrator validate that the PINPadDLLInstall.msi is installed and running on the PC.

Question: Why was the message "Error: Host Cancel" received when attempting to PIN?

Answer: "Error: Host Cancel" typically indicates that the process was aborted by the user when attempting to communicate with the PIN pad. Please try again.

Question: When attempting to print, the card is printed at the wrong location. What could cause this to happen?

Answer: In the event multiple printer options exists for a user, the first troubleshooting step should be to validate that the correct printer was selected in the drop-down menu when the card was requested to be printed.
If branches have only one printer per location, and the issue is experienced only at one workstation, validate that the correct branch is specified within the Console Control in Episys®. It is likely that the workstation is pointed to another location in error.
If all workstations are experiencing this issue, an administrator with access to the CARDPRINTING.ADMIN file should validate that the printers are appropriately mapped to the correct branches. If a discrepancy is noted, the file should be updated on one workstation at each branch.

Question: Card Record File Maintenance isn't correctly updated after a card is printed or pinned. What could be causing this?

Answer: This issue is most commonly caused by user error. Please validate that the Finish button is selected at the end of the print or PIN process, and the pop-up box appears. Once "OK" is selected on the pop-up box, the interface will close. If this process is not followed properly, the card information will not be updated correctly and may result in issues with usage and duplication of the card for the cardholder.

Question: What does "Error: EFT Source PIN Pad dll not installed" indicate?

Answer: This issue is the result of the PIN pad being used on a workstation where the proper drivers to utilize the PIN pad have not been installed. Please contact an internal technical resource to insure the PIN Pad local service has been properly installed on the workstation encountering the error.

Question: How can the printed cardholder name be configured?

Answer: By default-maximum cardholder names may only contain 26 characters. If the cardholder name is not printing desirably, and the Institution is using the Symitar *Card Creation Wizard* – ensure the **max name length** is setup for 26. When the card holder name exceeds the value specified in this parameter, the user will be prompted to modify the name fields to shorten the name and a separate card name will be created. The separate card name is picked up for use with instant issue product. If the Institution is NOT using the *Card Creation Wizard* and the name length exceeds max characters, the *CARD NAMETYPE* will need to be set to (2) separate, card name and address. The user should create a Card Name record with the shortened name.

Setup

Question: What does "Error: Script Error- An Error has occurred on this page" or "Error: Access is Denied" mean?

Answer: This issue is likely the result of a user access issue. Please check the user's access and role in the CARDPRINTING.ADMIN file to validate appropriate setup.

Question: What does "Error: Sequence contains more than one element" mean?

Answer: This is a generic error, but likely indicates that there is a duplication of the printer name utilized within the Card@Once® system. Please contact Card@Once® for assistance if this error is experienced.

Question: Why doesn't the printer show after adding it to Printer Definitions?

Answer: Printer options will only be displayed in a drop-down format in the event multiple printers are added for a given location/branch. If only one printer is to be utilized/added for each branch, this printer will be selected by default, and the user will not be given the option to choose.

QUESTIONS AND SUPPORT

For additional questions and support, please reach out to Card@Once® Technical support.

Representatives may be reached at 1-800-237-3387, option 2 or by email at support@cardatonce.com.

Monday-Friday 7 am CST- 6 pm CST