TOPPAN
TOPPAN FUTURECARD

User Manual
INSTA_PAY
INSTANT ISSUANCE MANAGEMENT SYSTEM
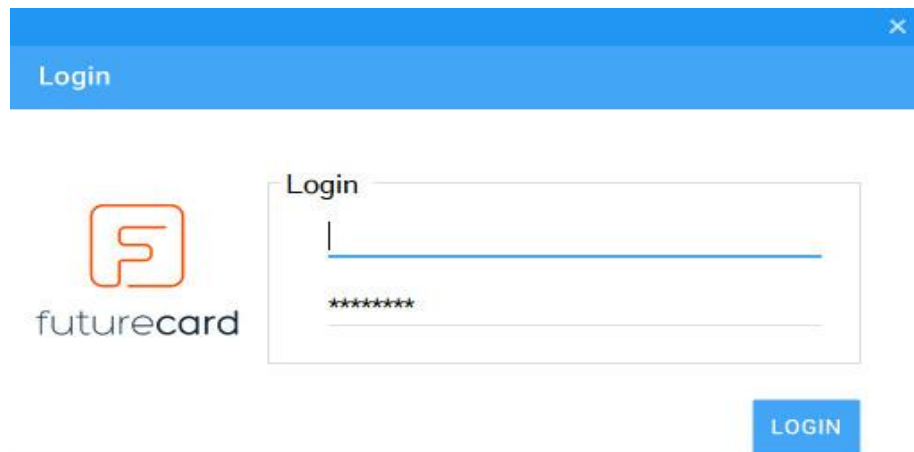
June, 2021

TABLE OF CONTENTS

1. INTRODUCTION

FC INSTA PAY is an application developed as part of Instant Issuance Management System by Toppan Futurecard. It is a fully packaged, in-branch solution which consists of both software and hardware components.

Main components of Instant Issuance Management System:

- **DataCenter:** VISA/MC certified datacenter that is fully located on Toppan Futurecard premises.
- **Client Interfaces: FC INSTA PAY -** Easy to use interface to manage data & production.
- **Printer:** Hardware component, specifically designed for instant issuance system

2. LOGIN

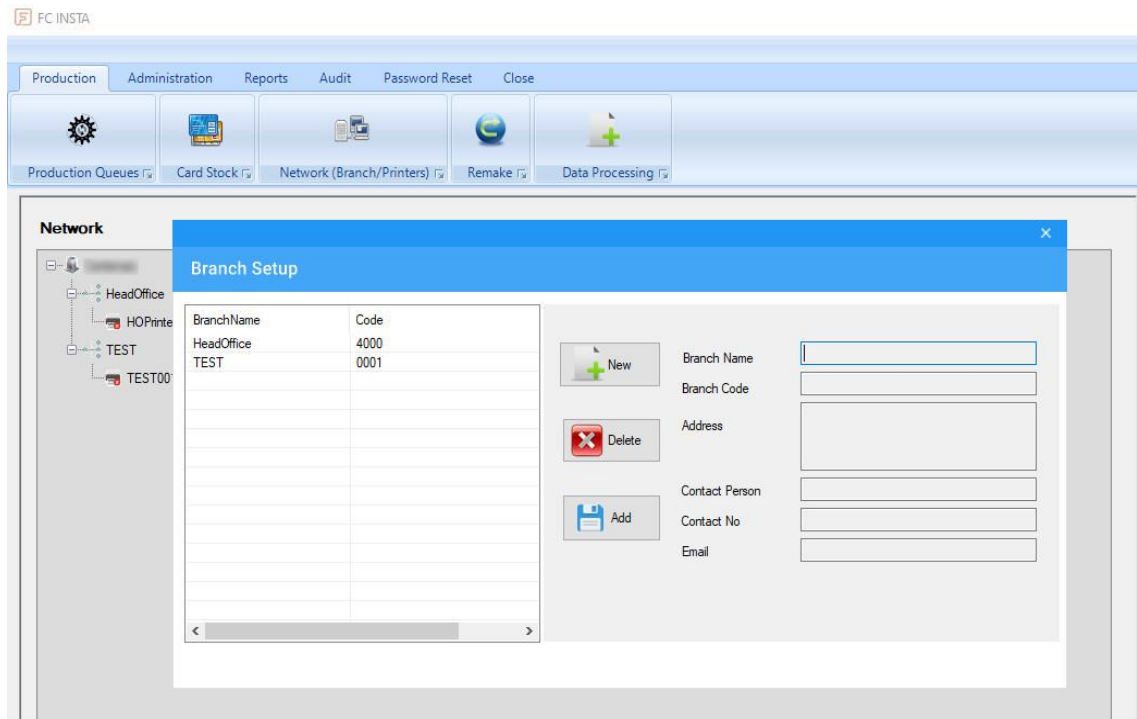User authentication is required to access any authorized **FC INSTA PAY** menu options.

\<Login Screen\>

\<Login\>   : to login and enter INSTA PAY

3. PRODUCTION

3.1 Branch Setup

This section is used to define the branches within the bank.

- To **CREATE** a new branch, **EDIT/UPDATE** or **DELETE** an existing branch: Right click on the <Bank > node (Centenary), select "Branch Setup", a sub-window called "Branch Setup" will appear.
- The Branch Setup window will have the following options:
  - **New** – Create a new branch. After pressing "Add (save)" the branch will appear on the list of branches on the left.
  - **Delete** – select the branch you want to delete on the left and press "Delete".
  - **Add** (save) – Used to save the details of a newly defined branch or save the changes of an existing branch. To edit or update an existing branch, select the branch you want to edit/update on the left, make the changes and press "Add".
- Branch Name & Branch Code are mandatory fields. Branch Code is used as a unique identifier.

User Manual
INSTA_PAY
INSTANT ISSUANCE MANAGEMENT SYSTEM

June, 2021

TOPPAN
TOPPAN FUTURECARD

3.2 Printer Setup

This section is used to configure different printers (personalization machines) within the branches.

- To **CREATE** a new printer, **EDIT/UPDATE** or **DELETE** an existing printer: Right click on the <Branch > node (HeadOffice), select "Printer Setup", a sub-window called "Printer Setup" will appear.
- The Printer Setup window will have the following options:
  - **New** – Create a new printer. After pressing "Add (save)" the printer will appear on the list of printers on the left.
  - **Delete** – select the printer you want to delete on the left and press "Delete".
  - **Add** (save) – Used to save the details of a newly defined printer or save the changes of an existing printer. To edit or update an existing printer, select the printer you want to edit/update on the left, make the changes and press "Add".
- Name, Code, IP Address, Port are all mandatory fields
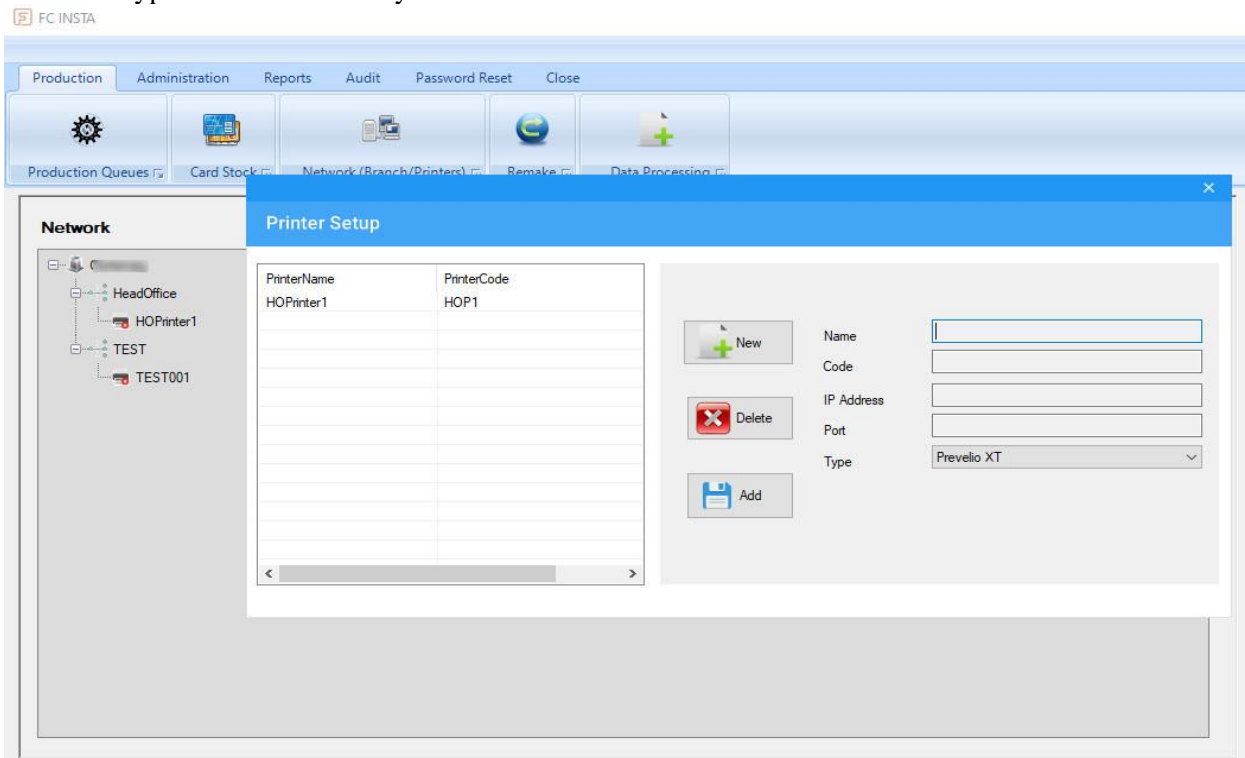
<Name>: Unique Name to identify the printer.
<Code>: Unique Identifier that will be used for internal reference.
<IP Address>: Static IP Address of the printer within the network.
<Port>: By default the value will be 9632.
<Type>: Value will always be Prevelio XT.

TOPPAN
TOPPAN FUTURECARD

User Manual
INSTA_PAY
INSTANT ISSUANCE MANAGEMENT SYSTEM

June, 2021

3.3 Production Queue

This queue lists the different card data that is available for printing. Once the bank uses the 'Data Processing' option to upload the data, the respective card data will be available on the production queue.
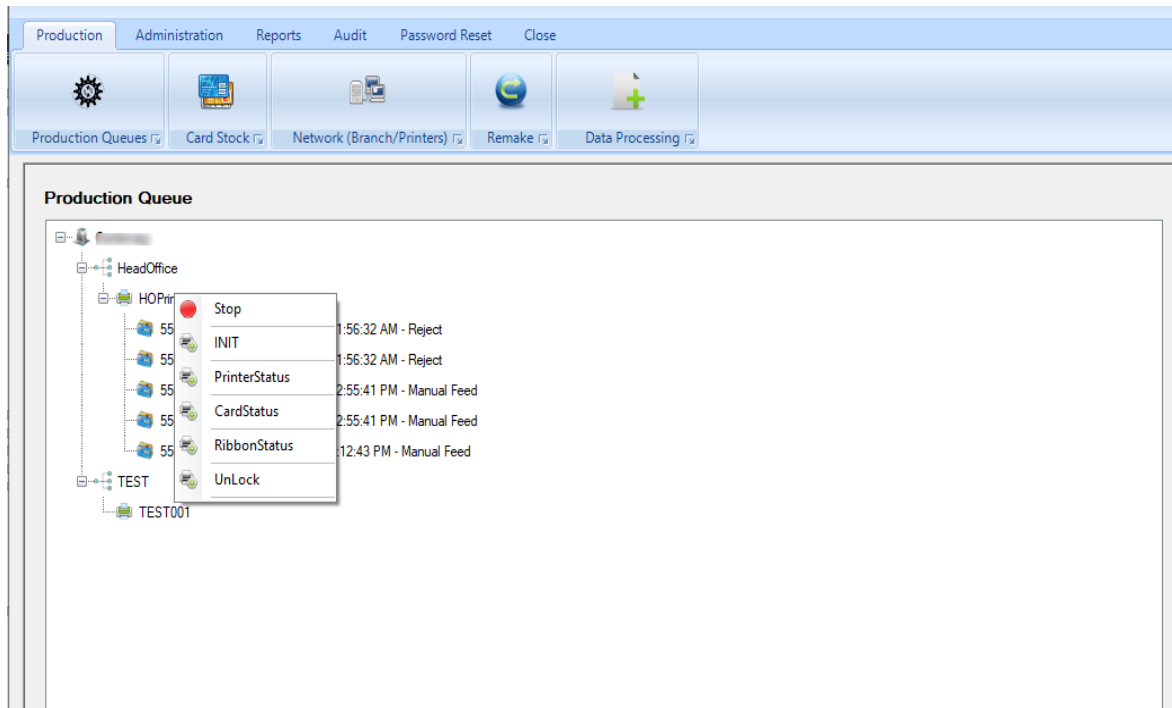
Different options are available on each card data within the production queue:

- Hold/Release: card data status can be set to **Hold** (do not perso)/**Release** (ready for perso)
- Produce: this option will send the card data to the printer once the printer is available.
- ReAssign Printer: this option can be used to send the card data to another printer within the branch if the current assigned printer is not available.
- Manual Feed: The printer waits for the card to be available through manual feeder.
- Cancel: Card data will be removed from production queue and will be moved to archive.

User Manual
INSTA_PAY
INSTANT ISSUANCE MANAGEMENT SYSTEM

June, 2021

TOPPAN
TOPPAN FUTURECARD

3.4 Card Stock

The Card Stock window will help in tracking the stock of cards that will be assigned to a branch Each product/card design can be logged and tracked. It has options to change the status of the card based on quantity, as it moves through the process of final production printing/personalization.

3.5 Network

This window shows the network structure of the solution. It will list the different branches and the printers available within each branch. Active and inactive printers within the network will be shown here as well.
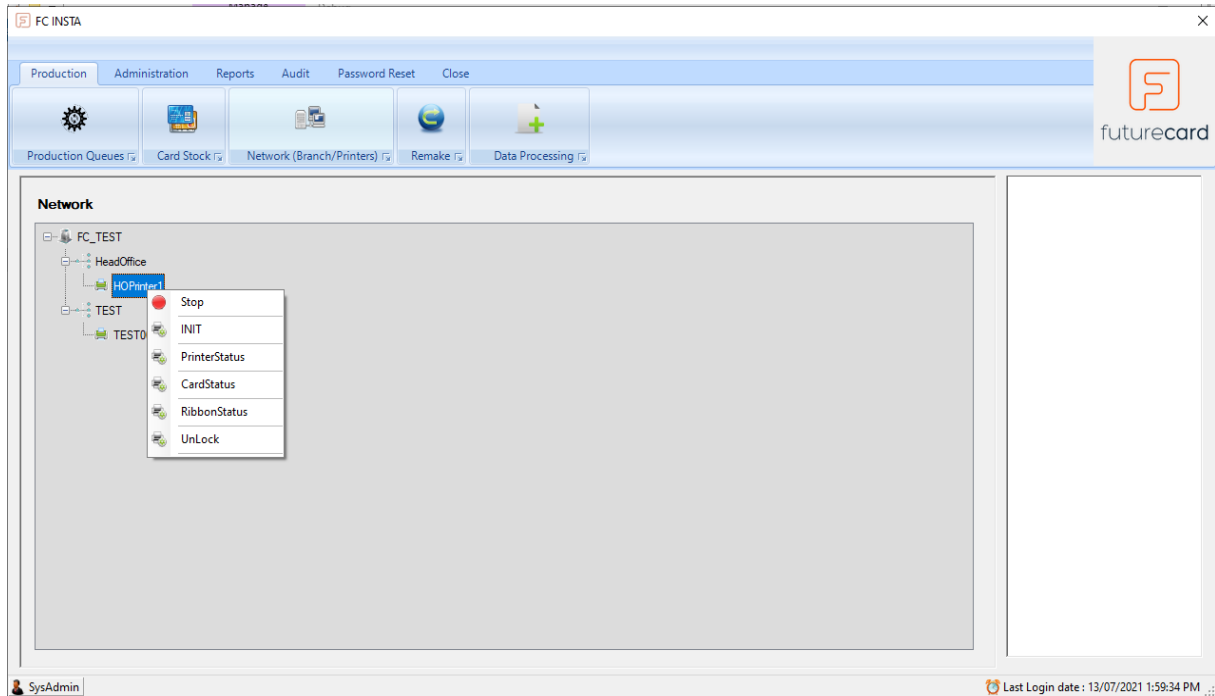

Different options are available on each Printer node within the network:

- Stop: This option disables the printer and it will no longer accept print request
- INIT: This option will re-initialize the printer
- Printer Status: This option will give the status of printer readiness
- Card Status: This option returns successful if all feeders have cards available.
- Ribbon Status: This gives the status of ribbon used for printing
- Unlock: The mechanical lock on the printer can be unlocked using this option

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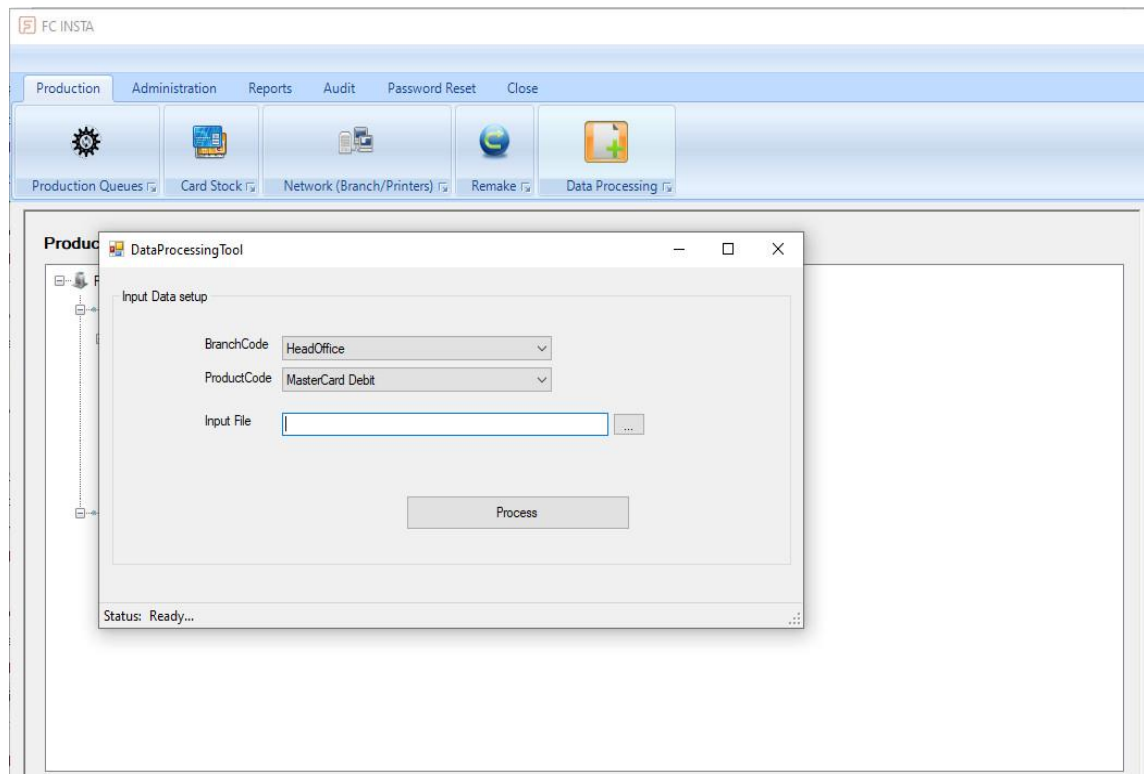
3.6 Remake

This section can be used in case there is a requirement to reprint a good card. This usually happens when there is QA reject due to the print quality or damage to card body. Remake selection has the option to search and select the appropriate data for reprinting. The option requires a second login credential for authorizing the data selection.

TOPPAN
TOPPAN FUTURECARD

User Manual
INSTA_PAY
INSTANT ISSUANCE MANAGEMENT SYSTEM

June, 2021
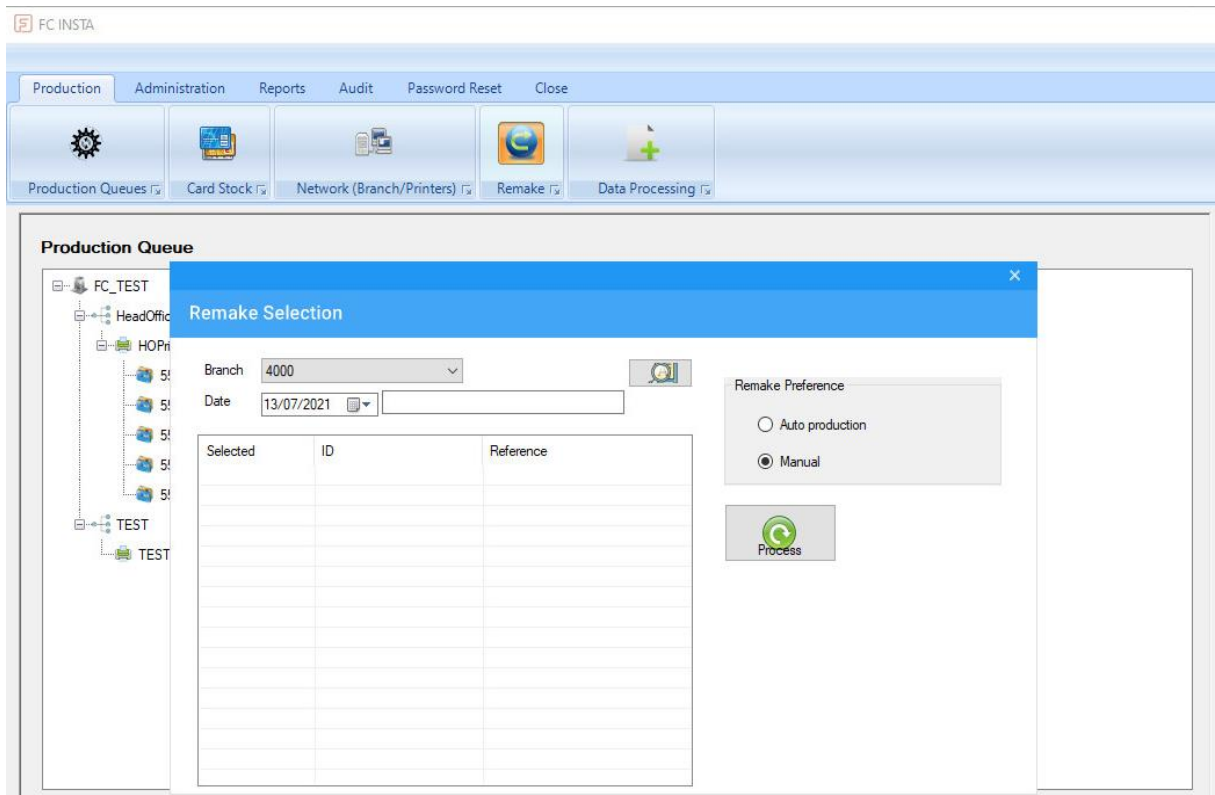
3.7 Data Processing

- The bank will use the Data Processing section as shown in the screen below to input the data to the system
- Select appropriate branch and product code
- Browse and select appropriate production data file and click on process
- Once the data processing is successful, the card data to be printed will be available at the production queue menu.

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TOPPAN
TOPPAN FUTURECARD

User Manual
INSTA_PAY
INSTANT ISSUANCE MANAGEMENT SYSTEM

June, 2021

4. ADMINISTRATION

4.1 User Management

User Management section is used to set up various users of the application, their user profiles as well as their privileges.
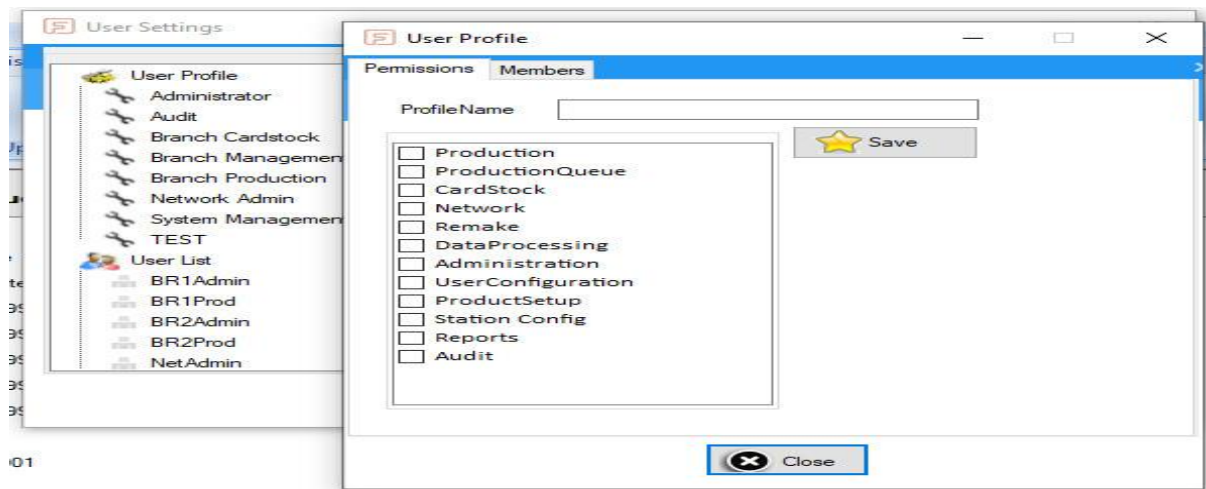
4.1.1 User Settings

User settings section is used to create user profiles (groups) and users.
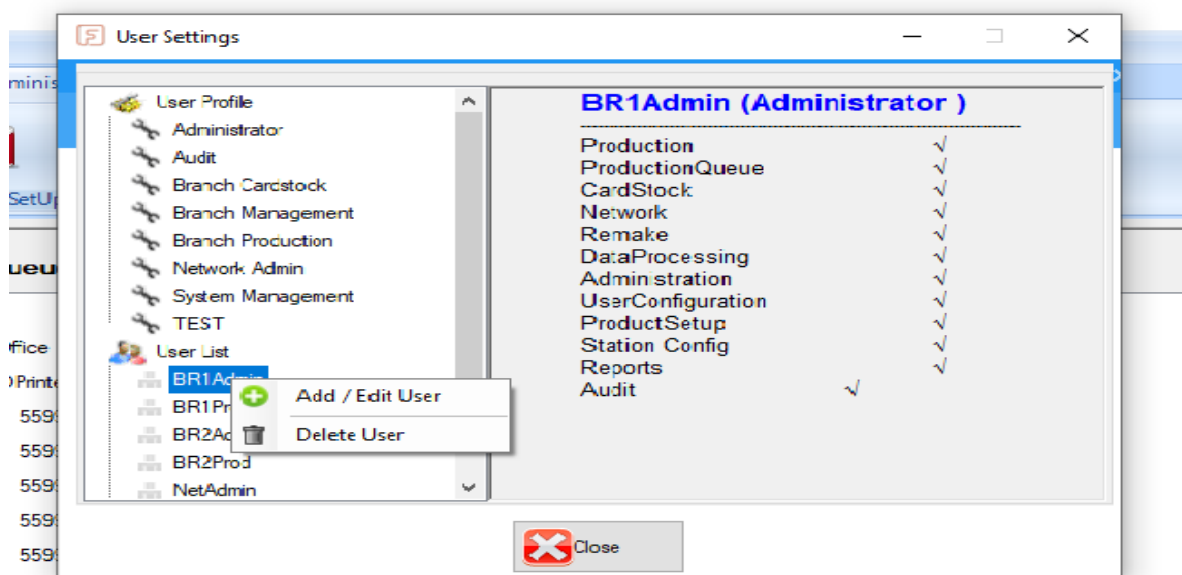
<User Settings> *(menu option: Administration/Users)*

- To create a new profile: Right click on the <User Profile> node, a submenu will pop up with "Create Profile" option .
- To Delete a profile: Right click on the <User Profile> node, a submenu will pop up with "Delete Profile" option
- To Create a new user: Right click on the <User List> node, a submenu will pop up with "Create User" option
- To Delete a user: Right click on the <User List> node, a submenu will pop up with "Delete User" option
- To Edit a profile : Double click on the selected profile will a popup a new screen

User Manual
INSTA_PAY
INSTANT ISSUANCE MANAGEMENT SYSTEM

June, 2021

TOPPAN
TOPPAN FUTURECARD

<User Profile Configuration> *(menu option: Administration/Users)*

This screen is used to configure the privileges of s profile and members(users) of a Profile.

Below screen is used to configure Users (add new users and edit existing users).
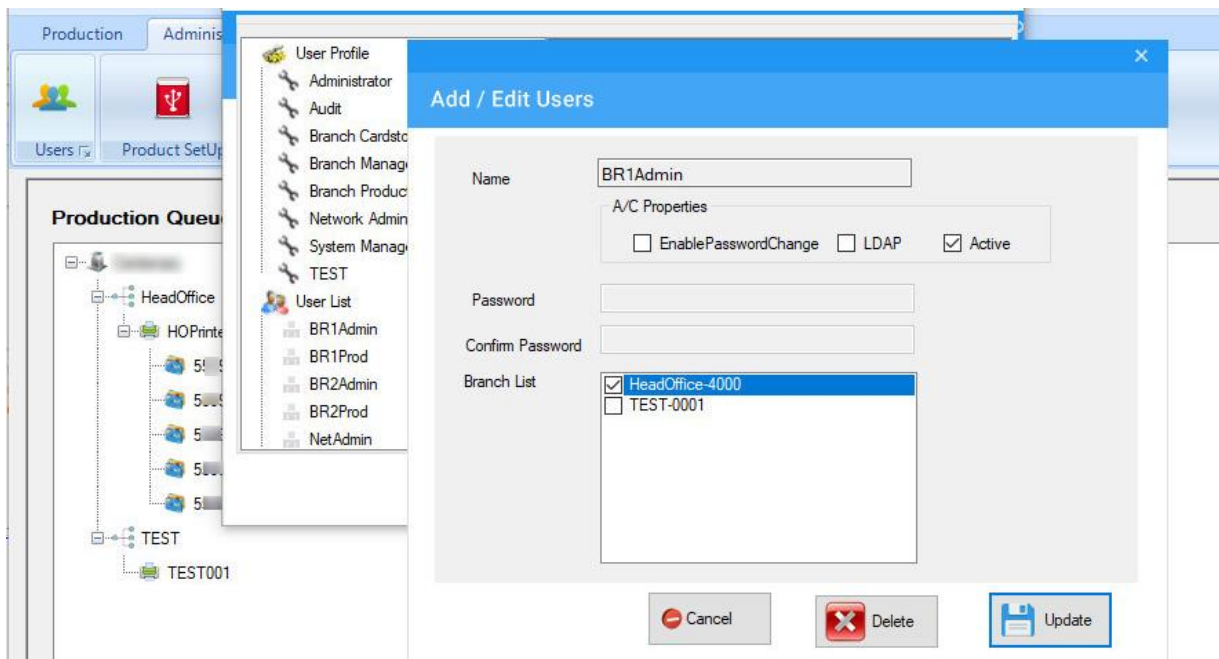
4.2 Product Setup

This option will allows to create different card products and each card data will be associated with a product.

<Product Code>: Unique identifier for the product.

<Product Name>: Unique name for the product.

<Profile IIN>: Unique ID that will be provided by Toppan Futurecard, it's a reference to the Data Processing profile used at Toppan datacenter.

<Personalization Script >: Value Provided by Toppan Futurecard, it represents the different printer script that will be used for this product.

<Browse>: Image of the card that will be used along with the product can be assigned here.

<Product-Branch Enablement > this section allows selection of the station configuration, that will be used for each product. (details of Station Configuration will be explained in section '4.3 Station Configuration')

4.3 Station Configuration

This will be used to configure the modules that will be used for a particular product. The Evolis printer has multiple feeders, magstripe modules, smartcard and eject boxes. We can configure a particular station configuration pattern and assign this to a product during the product setup.

For example, we can configure 2 station configurations with cards taking from different feeders and assign to different products as given below

- VISA product taking from feeder1
- MC product taking from feeder2

User Manual
INSTA_PAY
INSTANT ISSUANCE MANAGEMENT SYSTEM

June, 2021

TOPPAN
TOPPAN FUTURECARD

5   AUDIT TRAIL

This section is used to generate various audit trail queries. The system will log every user activity in a secured audit trail database. You can search the log based on various search criteria such as user, operation, date etc. The log can be exported to Excel for further log management.