



**IDCAPTURE**

# User Manual

**Version 2.4.0**

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understanding card configuration, and user/site options

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## Important Information

### TERMINIOLOGY

Throughout this guide, certain generic terms are used that may not always reflect your version of IDCapture.

**Site** - Your site is your organisation, whether that is a school or club etc. Site settings refer to things like custom fields and barcodes etc that your site wishes to print on cards.

**Patron** - Refers to a person in your list that you are ordering cards for. For a school, a 'patron' is a student.

**Dashboard Panels** - The 'dashboard' is the screen you see after logging in. We say this screen is divided into three 'panels' (generally they are: list, details, preview)

### WEB BROWSER

While IDCapture does work in Firefox and Microsoft Edge, we recommend using Google Chrome where possible. Unfortunately we are unable to support Internet Explorer.

### CARD PREVIEWS

The card preview you see in the right-hand panel when editing a patron is not a completely accurate representation of how your card will look when printed. We have done our best to give an approximation of our standard layouts.

## My Account

### SIGNING UP

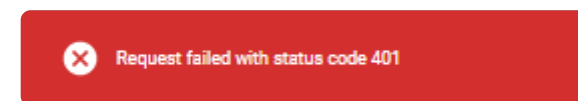
To request a login for IDCapture, simply contact Monitor WA at [support@monitorwa.com.au](mailto:support@monitorwa.com.au) or (08) 9240 4777

### LOGIN

The first time you login, you will be greeted with a Reset Password screen. This is your chance to choose your own password, instead of using the default one supplied by Monitor WA.

### ERRORS

Sometimes, after failed login attempts or switching accounts, you may see this error message in the lower left-hand corner.



If you come across this, simply refresh the page (Ctrl+R on Windows or Cmd⌘+R on macOS) and try again.

### RESET YOUR PASSWORD

If you have forgotten your password, you can click the Forgot Password button on the login page, and enter your email address to be sent reset instructions.

# People

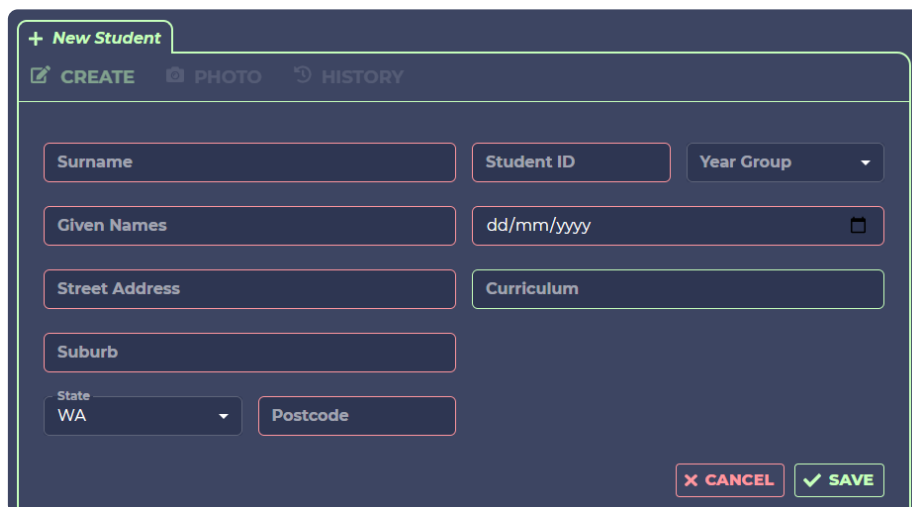
## CREATE A PATRON

To create a new patron, click the **Add New** button just above the left hand panel.



## PATRON DETAILS FORM

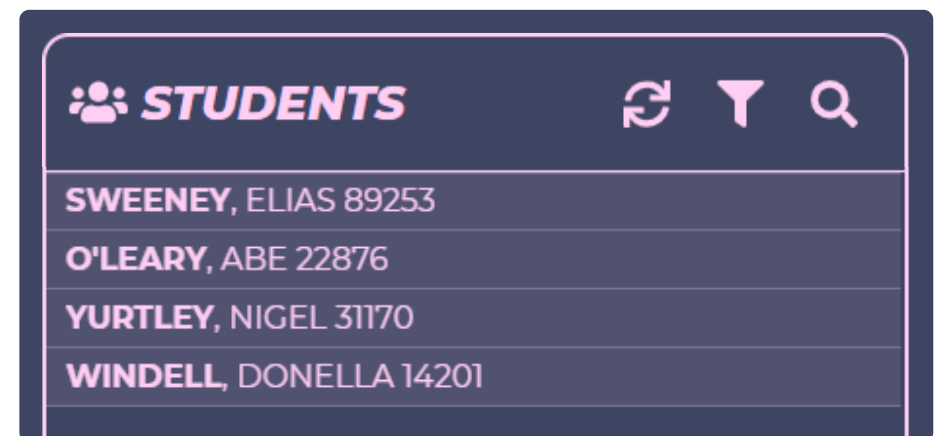
The details form for editing/creating patrons will vary depending on the details you need for your cards. Please ensure all mandatory fields are filled in before clicking **Save**.





A form titled '+ New Student' with tabs for 'CREATE', 'PHOTO', and 'HISTORY'. It contains several input fields: 'Surname', 'Student ID', 'Year Group' (dropdown), 'Given Names', 'dd/mm/yyyy' (date field), 'Street Address', 'Curriculum', 'Suburb', 'State' (dropdown with 'WA' selected), and 'Postcode'. At the bottom right are 'X CANCEL' and '✓ SAVE' buttons.


Surname	Student ID	Year Group
Given Names	dd/mm/yyyy	
Street Address	Curriculum	
Suburb		
State WA	Postcode	


## PATRON LIST

The list on the left hand side of the dashboard is a list of all the patrons you have saved in your database. Click on a name to select them and bring their details up in the main panel.



 <b>STUDENTS</b>			
SWEENEY, ELIAS 89253			
O'LEARY, ABE 22876			
YURTLEY, NIGEL 31170			
WINDELL, DONELLA 14201			

The  button is to refresh the list of patrons, making sure the latest data is displayed. Use this if you have created or deleted a patron but they aren't showing up in the list.

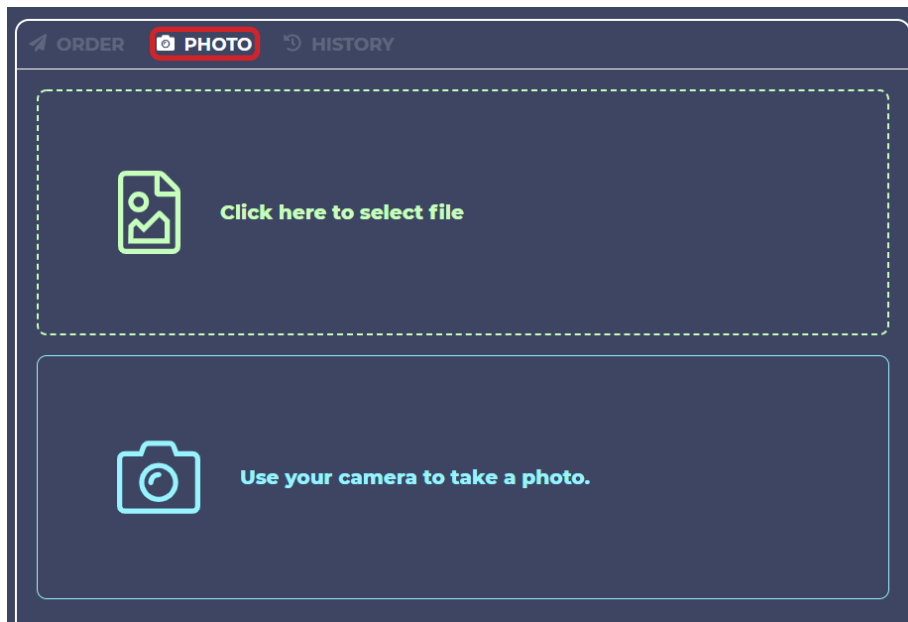
The  button is used to filter students based on their year group. Clicking **Apply** will have the list display the chosen year group, or you can **order cards** for the selected year group.

The  button can be used to search for patrons based on their first or last names.

# Photos

## ADDING A PHOTO

To add a photo, select a patron from the list, and click into the **Photo** tab in the middle pane.



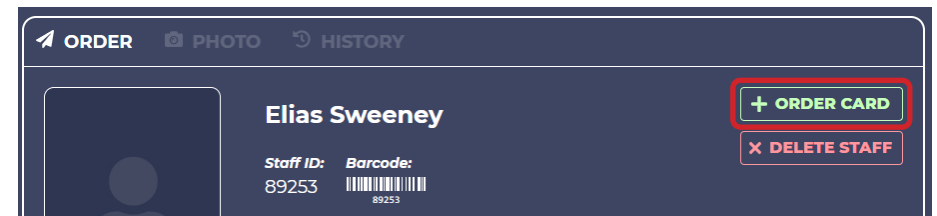
You can upload a file either by clicking on or dragging a file into the green box (note: cannot be bigger than **10MB**)

Alternatively, you may take a photo with your USB webcam by clicking into the blue camera box. You will need to accept the request for camera permissions in your web browser.

# Orders

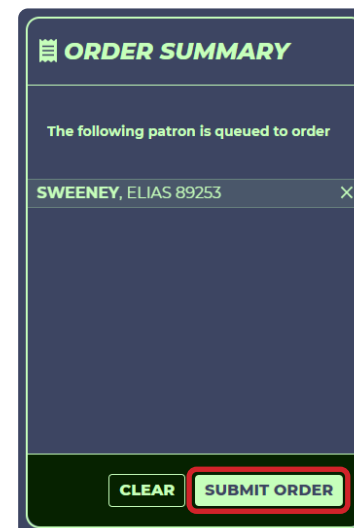
## ADDING A PATRON TO ORDER

To order a card for a patron, simply select them from the patron list on the left hand side, and click the **Order Card** button in the details panel.



## SUBMITTING YOUR ORDER

Once you've added all the patrons to your order list (appearing on the right hand panel), hit the **submit** button.



## BULK ORDERS

You can also order in bulk with the Bulk Actions button above the patron list. Either by year groups for schools, or all patrons.



Please note: we are currently working on implementing a way to bulk order only patrons without previous order history.

# Imports



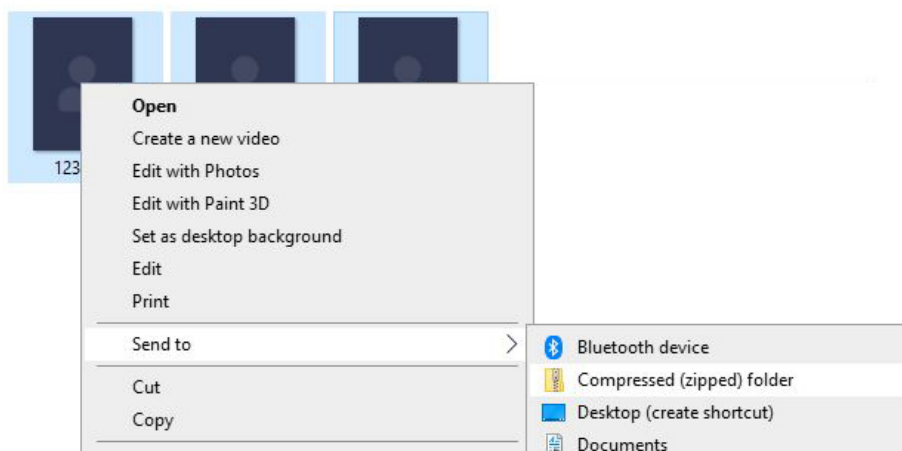
Navigate to the **Import** screen by clicking the green import button above the patron list on the left hand side.

## IMPORTING PATRON PHOTOS

To import multiple photos at once, you must first rename your photo files so that they match the patron ID. (This may be referred to as Student ID or Staff ID within IDCapture)

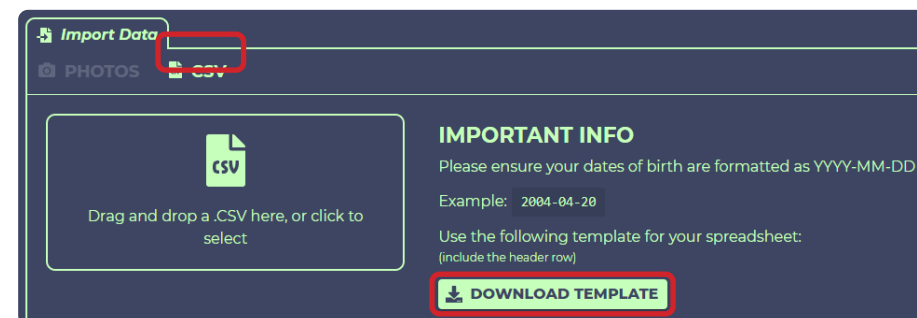
For example, if a patron has an ID of **123456**, the associated photo for that patron must be named exactly as **123456.jpg**

Once your files are all correctly named, they must be compressed into a .zip file. See the below screenshot for an example of how to create a zip file in Windows.



## IMPORTING PATRONS

To import multiple patrons, you must create a .csv file using a spreadsheet program such as Microsoft Excel.



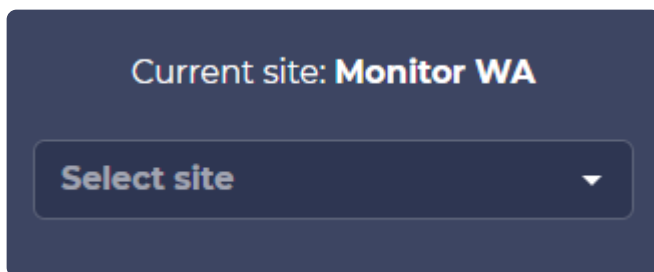
There is a .csv template provided, providing the correct column structure with appropriate headers. Please keep these headers as the first row in your import file. If you are including a date of birth with your patron data, please ensure it is formatted as **YYYY-MM-DD**

Please note: currently, our import facility can only handle roughly 100 records at a time. We are working to improve this to allow larger imports. Until then, please keep your csv files under 100 rows long.

# Settings

## CHANGING SITES

If you manage multiple sites, you can change your active site by using the drop-down menu in the header. Be sure to check you are in the correct site before creating new patrons.



## CARD SETTINGS

**Printed ID:** This is the value that will print on the card as the student/staff number. Generally this is set to the patron ID, but can be replaced with a custom field.

**Custom Fields:** This is where you enable/disable and name custom fields to be printed on the card. When you enable a custom field, it will then appear in the patron details form when editing/creating a patron. Please note that these will only be printed on the card if you have requested it in your card design, organised with us over the phone or by email.

## BARCODE SETTINGS

**Printed Barcode:** This is the value that will be used to create the barcode printed on your cards. Generally this is the patron ID, however it can also be a custom field (it is best to name the custom field as barcode to avoid confusion).

**Generation & Prefixes/Suffixes:** You have the option to include additional text before or after the chosen value for the barcode. This will be the same prefix or suffix for every card.

## USER/SITE SETTINGS

**Theme:** You have the option to select a light or dark theme for IDCapture's user interface.

**Data:** Allowing your records to be deleted will cause a red delete button to show itself in the patron detail form, allowing you to permanently remove the patron from your database.