

Getting started_Running ImageBase for the first time

Once installed, the ImageBase program may be run from the Windows "Start" menu in the "Programs" section under "ImageBase".

When first run you will be presented with the ImageBase welcome screen. This screen provides access to recently created ImageBase databases as well as giving you the ability to create new or browse for existing databases.

You should see the following screen when you first run ImageBase. For now, click the X button in the top right corner of the image below.



Registering ImageBase

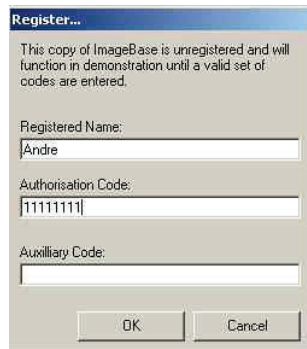
To Register the software for full use click the **Help->Register...** menu option. This is shown next to the **Window** menu option above.

The **Register...** dialog will now appear. You will have been provided a 'Registered Name' and 'Authorisation Code' with your ImageBase CD package. Enter these details in the associated text boxes as shown opposite.

In this example the details entered were (you will have your own Registered Name and Code):

Registered Name = **Andre**
Authorisation Code = **11111111**

If you do not have your required licence information please consult your supplier for the necessary details.



TIP: You can ignore the Auxiliary Code.

Only the Registered Name and Authorisation Code provided with your ImageBase CD is required for successful activation.

Creating a database to use

The first step in configuring ImageBase will be to create a database where your information can be stored. The types of information to be stored in the database will vary depending on your requirements, so for now we will concentrate on creating a standard employee database introducing you to the basics of ImageBase.

There are a number of available information fields that we will not use in the creation of this new database. However descriptions of these and their expected uses are included in the Reference section of this manual under the heading **Database Field Types** on page 150.

Defining what information is to be stored

The first step in configuring a database is deciding what information you want to keep a record of. We do this in ImageBase by using the Database Definition tool available via Menu options.

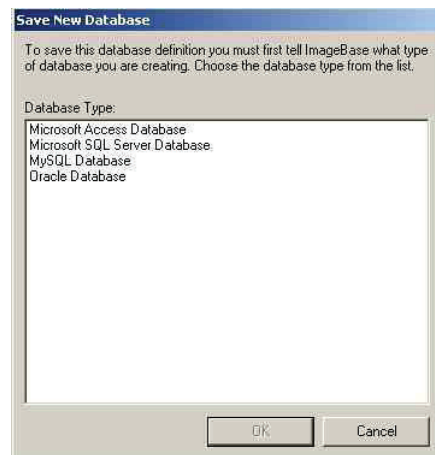
Select the **Database Definition** option from the **Admin** menu (or press the F12 key). This will bring up the Database Wizard, showing a number of template options. For the purposes of this example, select the **Blank Database** option and click the next button (for more information on using the Database Wizard, read Database Definition -> Database Wizard on page 145).

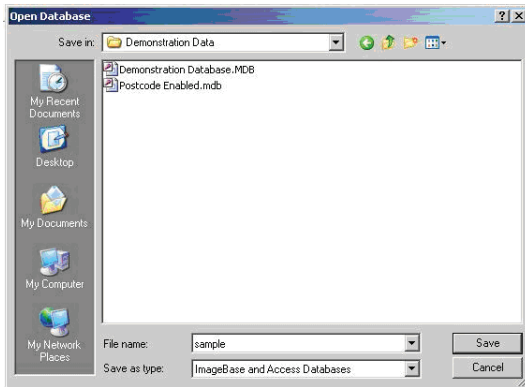
You must now determine what kind of database to create. There are a variety of options, but for now select the Microsoft Access Database as shown opposite and click the Ok button.

To select a **Database Type** click required option in the list and click the ok button.

Dependant on the option selected a dialog will appear that will prompt you for the required details in order to create your database. more information on different Database types can be found in Appendix B on page 174.

A screen will appear asking you where you wish to save the new database. We can use this screen to navigate around and choose a file location to save to.





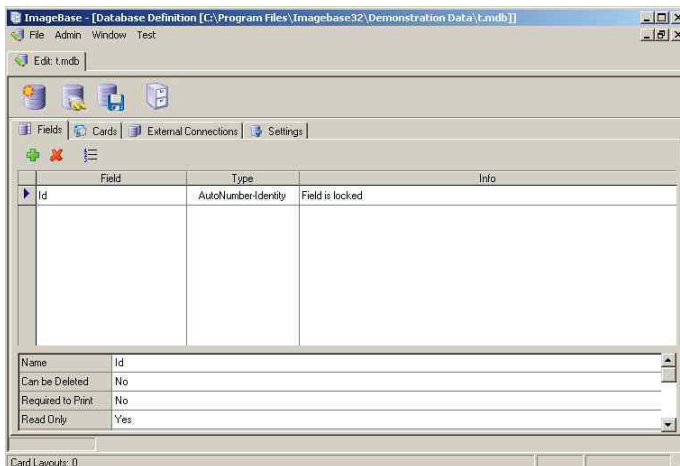
Navigate to the location where you wish to save the new database. A good location for now might be "c:\Temp". Type in the name **sample** into the File name field as shown above. This will be the name of your database and what will be used to reference when opening it.


Save Locations

ImageBase (Microsoft Access) databases can be stored in any file location that you can navigate to. This can be on your local machine or somewhere on your network. It is important to note however that network speed and connectivity can affect the performance of ImageBase. If you are unsure where to save the database consult with your local IT department.

Creating your fields to hold information

Your database will be no good to you until you have created all the fields to contain your employee information. A field is a 'place' in the database where data can be stored. Typically, fields hold different 'types' of information such as text, numbers or even images.

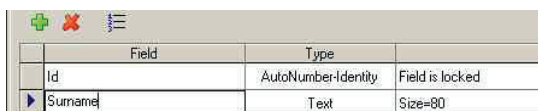


To add a new field to the database click on the Add button which is identified by the  icon. A new field will appear under the existing ID field with the type defaulted to **Text** and a **size=80**. You will also notice the information in the bottom window pane has changed. Each field has user configurable options and are explained in [Database field Configuration options](#) on page 150.

Note: Available options can vary between field types.

If the option is not available for a particular selected field type, it will not appear in the bottom window pane.

Edit the field by typing in 'Surname' as shown below.




Field	Type	Field is locked
Id	AutoNumber-Identity	Field is locked
Surname	Text	Size=80

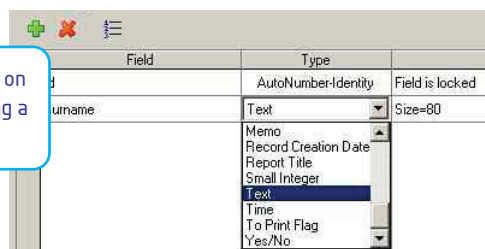
Once entered click on the ID field. This will remove focus from your newly created field, locking it into place. You can see this by the cursor being removed from the newly created field (note the field is not saved at this point).

More fields need to be added to our sample database to complete it. The next step in the creation of our employee database is to create all of the fields that we will need to record staff details. In our example this will include fields such as where in the company they work, whether they have had a card issued yet, how many cards they have had in total and their image.

Because some fields cannot be changed from one type to another i.e. Image to Date field, particular care should be taken to enter the correct **Type** and associated configurable options.

 To add each field, hit the add button and then enter the field name as indicated below. You will also need to select the field type by clicking in the next column and selecting a value from the dropdown list.

Select the type by clicking on the type field and selecting a dropdown item



Field	Type	Field is locked
Id	AutoNumber-Identity	Field is locked
Surname	Text	Size=80

Enter the following fields:

Field	Type	Size/Format	Additional Notes and Instructions
Surname	Text	80	<- This field should already exist (see previous)
Forename	Text	80	
Dept	Text	80	
Title	Report Title	n/a	
Count	Card Print Count	n/a	
To Print	To Print Flag	n/a	
Card Type	Card Designation	n/a	
Last Modified	Last Modified	n/a	
Image	Image	Square(1:1)	

The **Database Definition** should now appear as shown below:

Field	Type	Info
Id	AutoNumber-Identity	Field is locked
Surname	Text	Size=80
Forename	Text	Size=80
Dept	Text	Size=80
Title	Report Title	
Count	Card Print Count	
To Print	To Print Flag	
Card Type	Card Designation	
Last Modified	Last Modified	
Image	Image	

Name	Image
Can be Deleted	Yes
Aspect Ratio	Square (1:1)
Required to Print	No
Read Only	No
Validity	
Data Source	ImageBase
Data Statement	

Field Configuration options for an Image


Once all the fields in the above table have been created, a check should be made to see that no errors or extra fields have been entered by mistake.

The information that was entered for each field can be reviewed by left-clicking with the mouse on the grey part next to the field name (where the blue arrow covers). In the image below the current item selected is *Dept*.

Forename	Text	Size=80
▶ Dept	Text	Size=80
Title	Report Title	
Count	Card Print Count	


Left click on the grey part to select a record

If necessary you can modify field details by clicking on the name of the field which should place a flashing cursor inside the box (as shown when first creating a field). For example, above, if you clicked on the letter 'p' in Dept then this field would become editable allow you to change its details. This will also have the effect of changing the configuration options in the bottom window pane, making them available for editing.


 If there are any fields that do not match those listed in the table above, they should be removed by left-clicking on the offending field with the mouse to select it, then clicking the **Delete** button.

Limiting fields to certain data

For some types of text field, it is desirable to pre-define a set of entries that are often used within that field. For instance, the **Dept** field of the sample database is likely to have a fixed set of entries that are used over and over again. These fields might represent the current list of departments within the company.

To define these values in the sample database, select the **Dept** field in our list. In the field configuration options there will be an item called Values. Click on the **[None]** next to this field. This will display a  button towards the far right of the field.

Indexed	No
Values	(None) 
Restrict to Values	No
Data Source	ImageBase

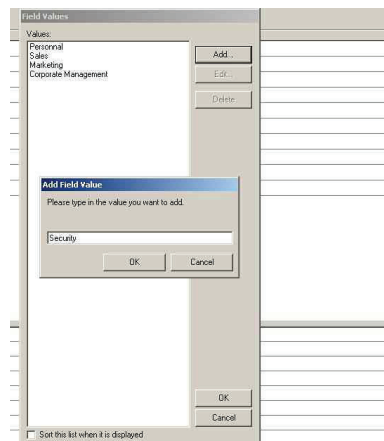
Clicking the  button loads the Field Values dialog from which you can add entries by clicking on the add button and then typing in the appropriate value.

For this example enter these 5 values:

Personnel
Sales
Marketing
Corporate Management
Security

When the list of departments is complete, click the OK button to return to the **Database Definition** dialog.

To have the list of field values sorted alphabetically select the check box at the bottom of the dialog.



You will notice that the [None] value previously existing in the Values field has now changed. It should reflect the number of items in the Field list. In this case it will be showing as **[5 in list]**.

Saving the changes



The database should now be saved again.

Click on the Save changes to Database button which is just under the menus at the top of the application.

Setting up the search fields

One of the most useful functions of a database is the ability to search through the entire set of records to find the people or information that is needed.

With this aim in mind, the next step in configuring the sample database is to define which of the fields in the database are going to be used for such searches.

To define a field as searchable requires altering the Indexed option located in the fields bottom window pane. An example of this is shown in the Image below.

Although most fields have this option available, it is not always practical to assign this feature. For the purposes of this sample database, the fields that are most useful in terms of performing searches are **Surname**, **Forename** and **Dept**. Ensure the Indexed value for each field is set to yes by changing its value as shown below.

Name	Surname
Can be Deleted	Yes
Size	80
Letter Case	Normal
Default	
Required	No
Required to Print	No
Read Only	No
Validity	
Indexed	Yes
Values	(None)
Restrict to Values	No
Data Source	ImageBase
Data Statement	
Include in Print Log	No

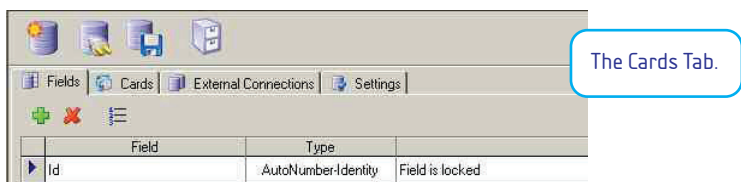
Once all fields have had their Indexed values changed ensure you save the database once more.

Adding card designs to the database

Card designs should be added to a database to make it easier to print cards and associate records to designs. Although you can easily create your own custom designs, at this stage there are some pre-constructed ones that we will use in order to get started.

The **Database Definition** should be visible with the nine fields added plus the ID field. Three of these fields should have their indexed value set to yes.

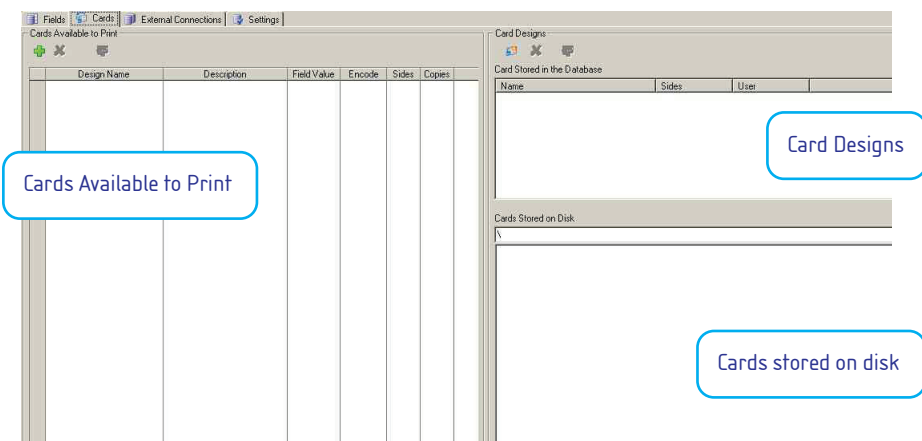
To add card designs or design from scratch now, click on the **Cards** tab.



This will change the Database Definition view to that shown below. From here you will see three sections. Before we start adding cards to the database a brief description of the sections should be covered first.

Viewable from the Cards tab should be 3 identifiable sections.

- Cards Stored on Disk
- Card Designs in database
- Cards Available to print

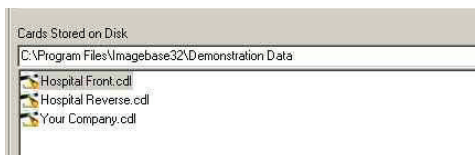


Cards Stored on Disk

If you have card designs located on disk, you can use this section to browse for them. This is done by clicking on the folder icon located to the right of the textbox.

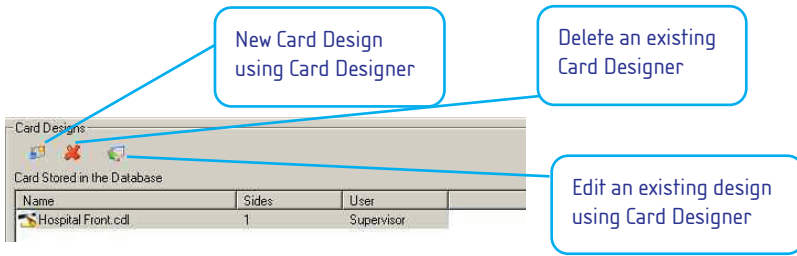
From there cards can be dragged into the Card Designs view if you wish to store them in the database permanently or they can be dragged directly into the Cards Available for print if you wish to leave their contents on disk.

In the image to the right, you can see three cards of type .cdl stored in the *c:\Program Files\ImageBase32\Demonstration Data* folder.



Card Designs

If you have card designs already stored in the database, these will appear in this section. From here you can choose to Add, Edit or Delete stored designs. This is done by clicking the buttons located below the **Card Designs** heading.



From the example above you will see the database has one card design stored within the database, namely Hospital Front.cdl.

Cards Available to Print

Because printing cards is an important part of ImageBase it is important that the card design used to print is easily accessible from within the application. This is made possible by providing the Card Designs tab where you can select and associate card designs for use within ImageBase.

If Cards are not attached to the database, then every time a card is to be printed, you would need to browse for that card design, either on disk, or by selecting from a list in the database. However, by attaching these designs, printing cards can become as easy as a one click operation.

In a real database, there may be several different styles of printed ID cards used for visitors, staff, security etc. For the purposes of this sample database we will convert an existing design on disk into one stored in the database and then reference that file in the **Cards Available to Print** section

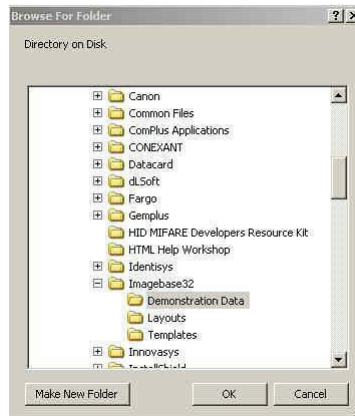
Adding a card design to the database

First we need to browse for the existing card design. To do this, click on the folder icon located to the right of the textbox in the **Cards Stored on Disk** section.

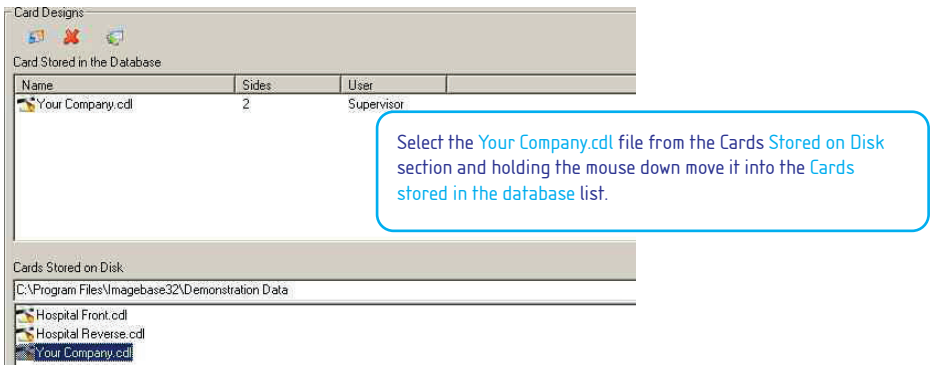
This will display a browse dialog. Browse to the folder as shown in the right hand dialog and click the ok button.

Once you click ok, the Cards Stored on Disk should be populated with all the .cdl files located in this folder.

This folder should be located in the installed directory for Imagebase, typically `c:\Program Files\Imagebase\Demonstration Data`.



To convert a card design from being stored on disk to being stored in the database is as simple as dragging the design you wish to use to the **Card Designs** section.



This card design is now stored in two locations. Within the ImageBase database and also on the File system. It is important to note that changes made to the Card design located in the *Demonstration Data* folder will not alter that stored in the database and vice versa.

We now need to add this design to the **Cards Available to Print** section to ensure the ImageBase printing process knows about it.

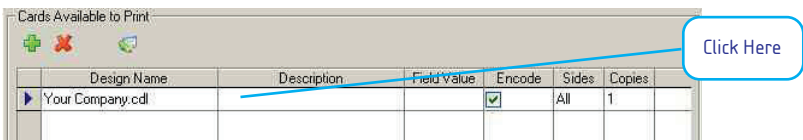
Using the same drag and drop method used above, select the Your Company.cdl file from the **Card Designs** section and move it to the **Cards Available to Print** section. This will add a new entry into the list, with the Design Name set to Your Company.cdl.

At this point a 'Description' and 'Field Value' can be specified for this card design template.

Description: Is used to identify this card design within the ImageBase application. For ease of use purposes keep this as short as possible to describe the intended use of the card design.

Field Value: Is a four character code which provides a way of referencing this card template in the database via a field. Field Values are only used in specialised situations where card types differ between groups of people within a corporation. We will not set a value for now.

For this example set the Description value as **'My Company'** and leave the field value blank. To change the description click in the empty square box next to the Design name labelled 'Your Company.cdl'.



Finished

Click on the button to save the changes made.



The database is now fully configured. All that remains is to open it and start adding data.