WizzForms Desktop

Auto-populating Forms and Data Capture Application

ID
IDScan.net

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Table of Contents

3

Introduction

Thank you for your purchase! IDScan.net's WizzForms is a software application that seamlessly pairs with any program to populate forms and databases with information gathered by scanning any ID.

Quick Start Guide

Installing software

[Download](https://idscan.net/support/downloadsmanuals/) the installation file:
https://idscan.net/support/downloadsmanuals/
Follow the prompts until the software is you are
finished installing. the software and restart the PC.

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Download   Release Notes

Registration

The full version of WizzForms is available for purchase here:
https://idscan.net/product/wizzforms-desktop-auto-fill-software-to-automate-id-data-and-image-capture/

WizzForms - Registration   ✕

Computer ID
Computer ID is a unique number for each computer.
Based on this number a unique License Key will be
created and sent to you for program activation. Please
note that 1 (one) License Key is valid for 1 (one)
computer only.

55255-CHEBARA-0466-0205   Copy

Register via Email   Register via Internet

License Key
Copy the License Key to the text box and click the
Register button to register. Click here to purchase a
WizzForms License Key.

Register

Close

After purchase is complete, Go send us your Computer ID by going to
Registration and selecting the appropriate option:

Copy Computer ID (to the clipboard)
Send Computer ID **via Email**
Register **via Internet**

You will receive a License Key by email within 24 hours.

After receiving your license key, enter it in the License Key box and press
Register. You can view the status of your Registration via the **About** menu.

Scanner Drivers:
              https://idscan.net/support/driver/firmware
WizzForms Manual:
              https://idscan.net/support/downloadmanuals

Contact support at: support@idscan.net or 1(631)380-8121

Getting Started

The information encoded in the 2D barcode (PDF417) or magnetic stripe of any US and Canadian driver's license (DL) or Identification Card (ID), military ID, Common Access Card, hunting/fishing license, Canadian health card, or passport contains a plethora of information.

WizzForms is compatible with any Windows computer (see System Requirements 2.1)and is able to be integrated into any type of application such as POS systems, visitor management solutions, text-entry programs (Microsoft Excel, Google Docs), or web-based applications. Setup is simple,intuitive, and only takes about 3-5 minutes with no programming skills required.

The information from a driver's license that can be captured includes the name, address, gender, date of birth, etc.. Here is a partial list of the fields you can capture:

Last Name	Birthday
First Name	Drivers License Number
Middle Name	License Expiration Date
Address1	Gender
Address2	Height
City	Weight
State	Hair Color
Zip Code	Eye Color

WizzForms Plus has the ability to capture the front and back images of the ID's and credit/debit cards. Doing this will link them to the ID's that you scan, thus creating a more complete profile that can be viewed in the WizzForms Report Viewer.

System Requirements

OS: Windows 7 or later with .NET Framework (free download)
RAM: 4 GB or higher

Supported Devices and Readers

WizzForms supports a variety of devices, all of which can be found on our website. We support the following ID reading and scanning devices:

- ID Tech MiniMag II
- E-Seek M200

- E-Seek M250
- E-Seek M260
- E-Seek M280
- Gemalto CR100/M
- Gemalto CR5400
- Gemalto AT9000
- Gemalto KR9000
- Gemalto QS1000
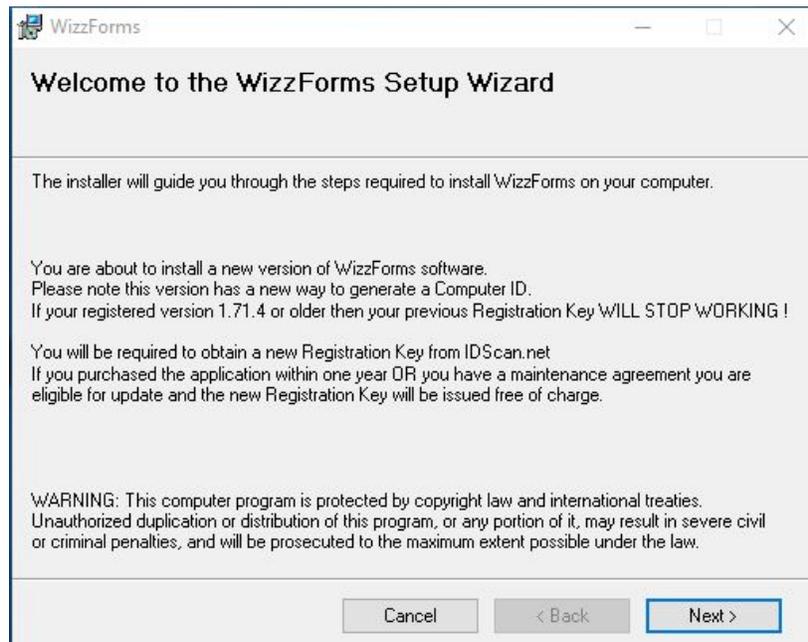- Koamtac KDC Scanners
- IDWare 7017

Installing WizzForms

1. Download the installation file from:
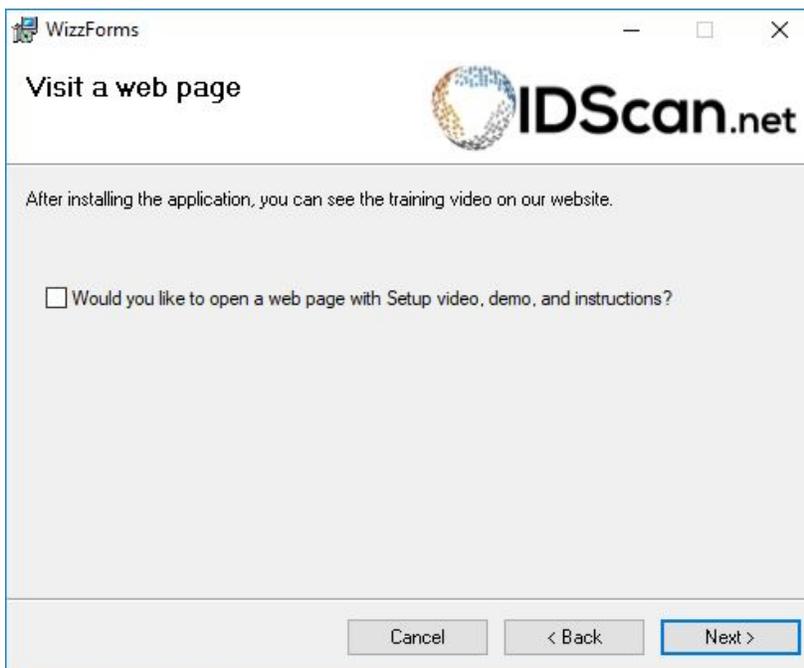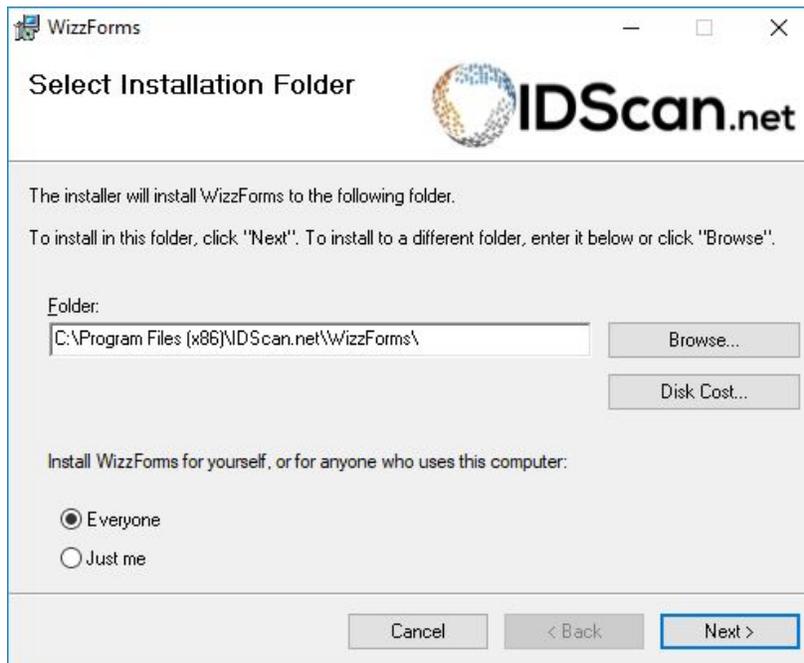https://idscan.net/support/downloadsmanuals/

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Download   Release Notes

2. Once downloaded, launch the program and if needed give administrative permission for the program to be installed.
3. Follow the prompts until the software is finished installing.A prompt with "Would you like to open a web page with Setup video, demo and instructions?"Upon clicking Close restart thePC.

WizzForms   —   □   ✕

Welcome to the WizzForms Setup Wizard

The installer will guide you through the steps required to install WizzForms on your computer.

You are about to install a new version of WizzForms software.
Please note this version has a new way to generate a Computer ID.
If your registered version 1.71.4 or older then your previous Registration Key WILL STOP WORKING !

You will be required to obtain a new Registration Key from IDScan.net
If you purchased the application within one year OR you have a maintenance agreement you are eligible for update and the new Registration Key will be issued free of charge.

WARNING: This computer program is protected by copyright law and international treaties. Unauthorized duplication or distribution of this program, or any portion of it, may result in severe civil or criminal penalties, and will be prosecuted to the maximum extent possible under the law.

Cancel   < Back   Next >

Registration

The full version of WizzForms is available for purchase here:
https://idscan.net/product/wizzforms-desktop-auto-fill-software-to-automate-id-data-and-image-capture/

After the purchase is complete, Go to **Registration** and select the appropriate option:

Copy Computer ID (to the clipboard)
Send Computer ID **via Email**
Register **via Internet**

Your License Key will arrive by email once request is received.

Upon receiving the license key, enter it in the License Key box and press **Register**. View the status of your Registration via the **About** menu.

Scanner Setup

WizzForms supports different types of devices, such as scanners by E-Seek and Gemalto.

Drivers for the supported scanners can be found at IDScan.net under our Support Menu labeled *Drivers & Firmware*..

E-Seek

1. Plug the scanner into any available USB port.

2. Download driver: https://idscan.net/support/driversfirmware/
3. Right-click the file **CDM v2.12.10 WHQL Certified** and Run as administrator.
4. Follow the prompts to install the driver.
5. Restart WizzForms.

Once the WizzForms application is installed, please make sure to configure the software properly to work with the hardware of your choice. This is done by selecting the **Reader/Scanner #1** drop down from the main menu of the program:
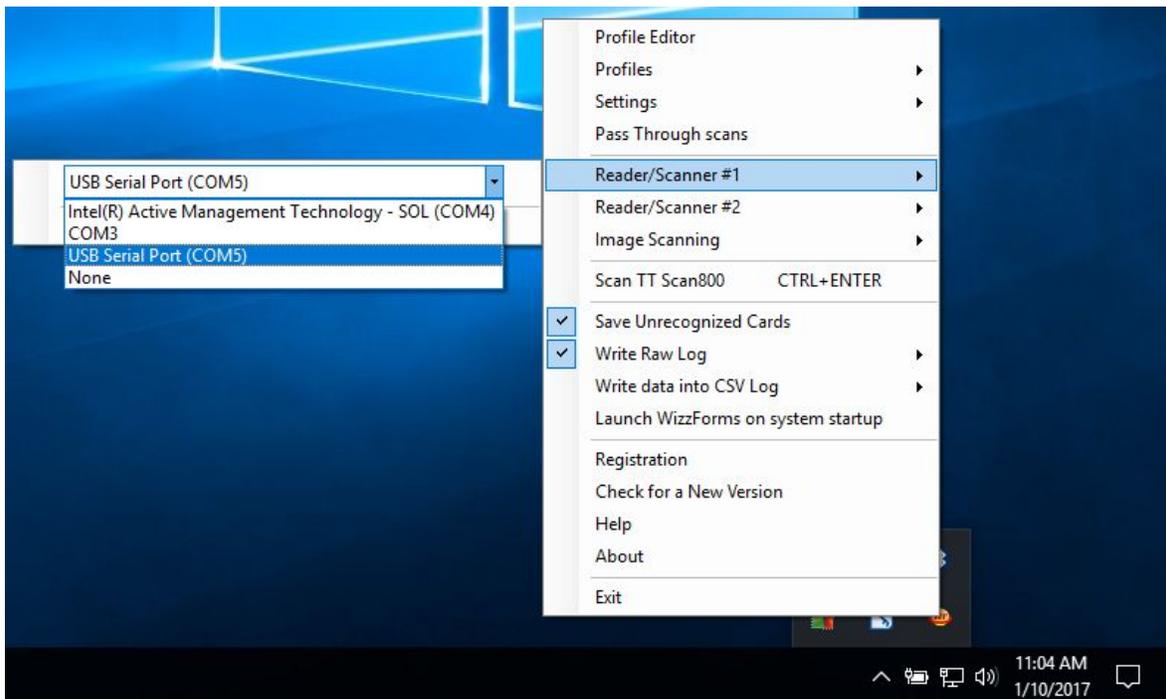
WizzForms has the option to have multiple ID readers or scanners connected to different COM-ports. If you utilize this feature, select the port under the **Reader/Scanner #2** drop-down menu under the *Main Menu* of the program.
To locate the COM port your scanner is connected to, , simply refer to Device Manager via the Hardware and Sound tab in *Control Panel*. Once in Device Manager, use the drop down under Ports (COM & LPT).

Gemalto

1. Plug the scanner into any available USB port
2. Download driver: https://idscan.net/support/driversfirmware/
3. Run install file and follow the prompts to install the driver
4. Restart WizzForms

5. Right-click on the WizzForms icon and go to Image Scanning > Page Reader Settings
6. Select connected scanner serial number from the drop down
7. Click OK

ID Tech MiniMag II

1. Download the driver from (https://idscan.net/support/driversfirmware/)
2. Plug the scanner in and allow Windows to install the basic drivers
3. Open the downloaded folder (**USBCDC_Driver_A.zip**)
4. Click *Extract All* on the File Menu bar
   80066803-004_USBCDC_Driver. Then Click **Extract**.
5. Open Device Manager on your PC.
6. Click on Ports and right-click USB Serial Device.
7. Update driver
8. Select Browse my computer for driver software
9. Point it to the previously unzipped folder, then click OK
10. Select Next and Windows will install the scanner with the required drivers

The device is now ready to be used within the WizzForms application.

Additional Setup Settings

Image Scanning

For scanners that require image capture, open WizzForms menu and go to Image Scanning > Save ID image to. Set a path for the images to be saved to.
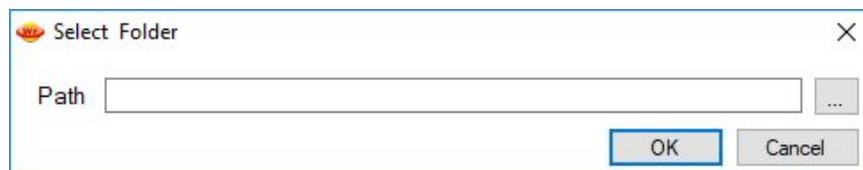
Repeat above steps to set path for Save Face image option under WizzForms Menu/ Image Scanning > Save Face Image to…

Page Reader

Save Image of Front and Back of an ID

WizzForms has the option to save the front and back side of an ID. By navigating to **Image Scanning**, then select the side(s) of the ID to save.
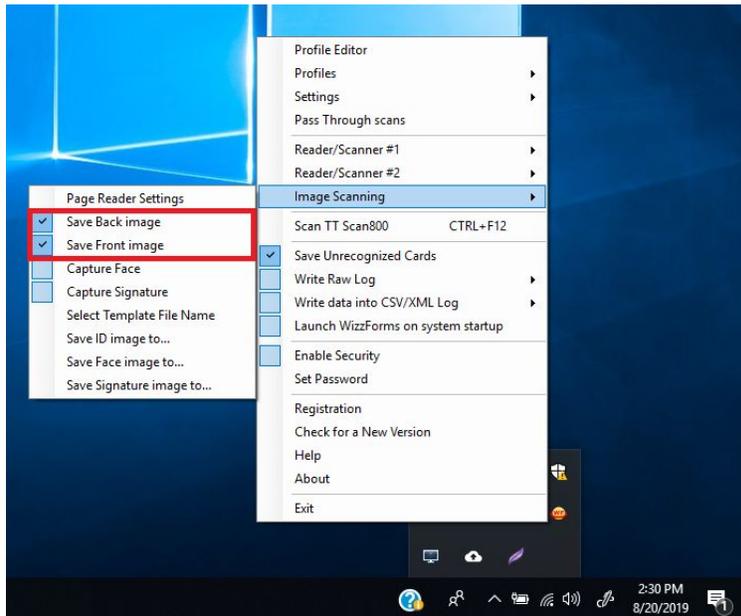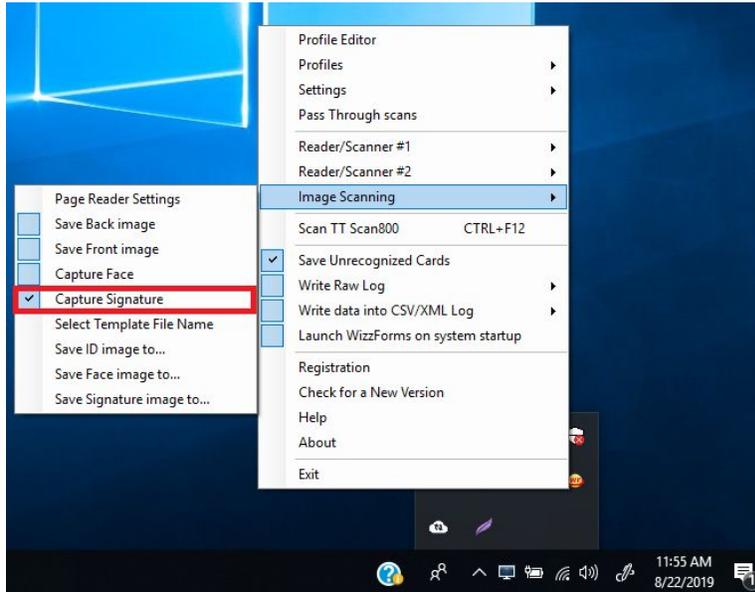
Capture Face

WizzForms allows you to capture the face image from an ID. To use this feature, go to **Image Scanning** and enable **Capture Face.**
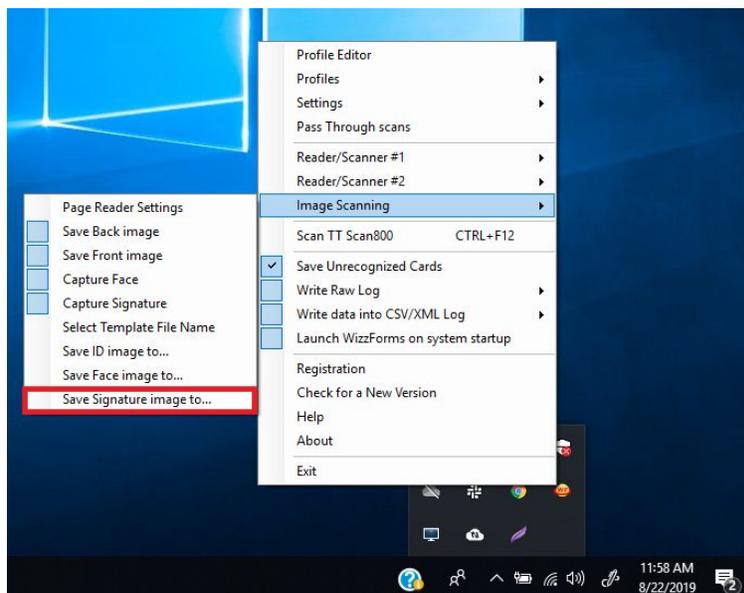
Capture Signature

Wizzforms allows you to capture the signature from the ID. To use this feature, go to **Image Scanning** and enable **Capture Signature**.


Saving Signature image to…

Wizzforms allows you to choose a location on your computer where the picture of the signature is stored. The default is

C:\ProgramData\Nautilus\WizzForms\Images\ However, by clicking the three dots next to the path, you may browse the files on the computer.

Saving the Image and the File Type

WizzForms allows customization of the file format for each picture saved via the **Image Scanning** into **Select Template File Name** option. The options available are .jpg, .png, .bmp, or .tiff file types. The file name is also customizable.
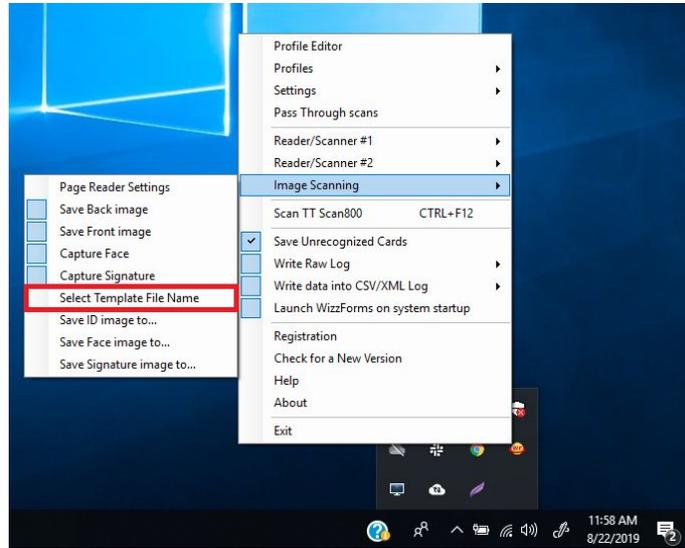
Additionally, there is the option to choose where on the computer to save these images. WizzForms has separate options for **ID Image**, and for the **Face Image** (requires Capture Face to be enabled).
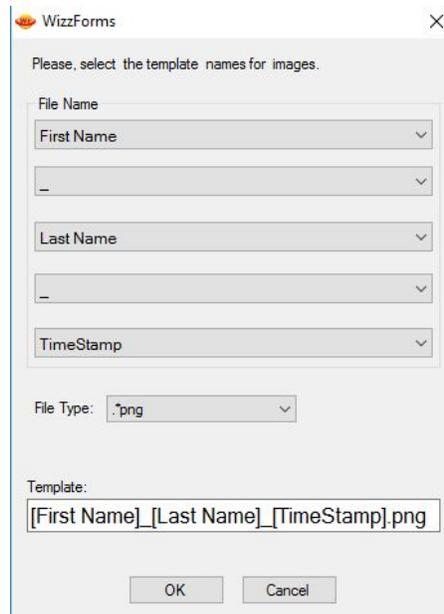
Permissions

Windows permissions play an important part in the proper functionality of WizzForms.

In a multi-user environment, make sure the administrator has granted the permissions to read and write to the following path:
C:\ProgramData\Nautilus\WizzForms

If the error that a *specific path is denied*, it is because of these permissions.

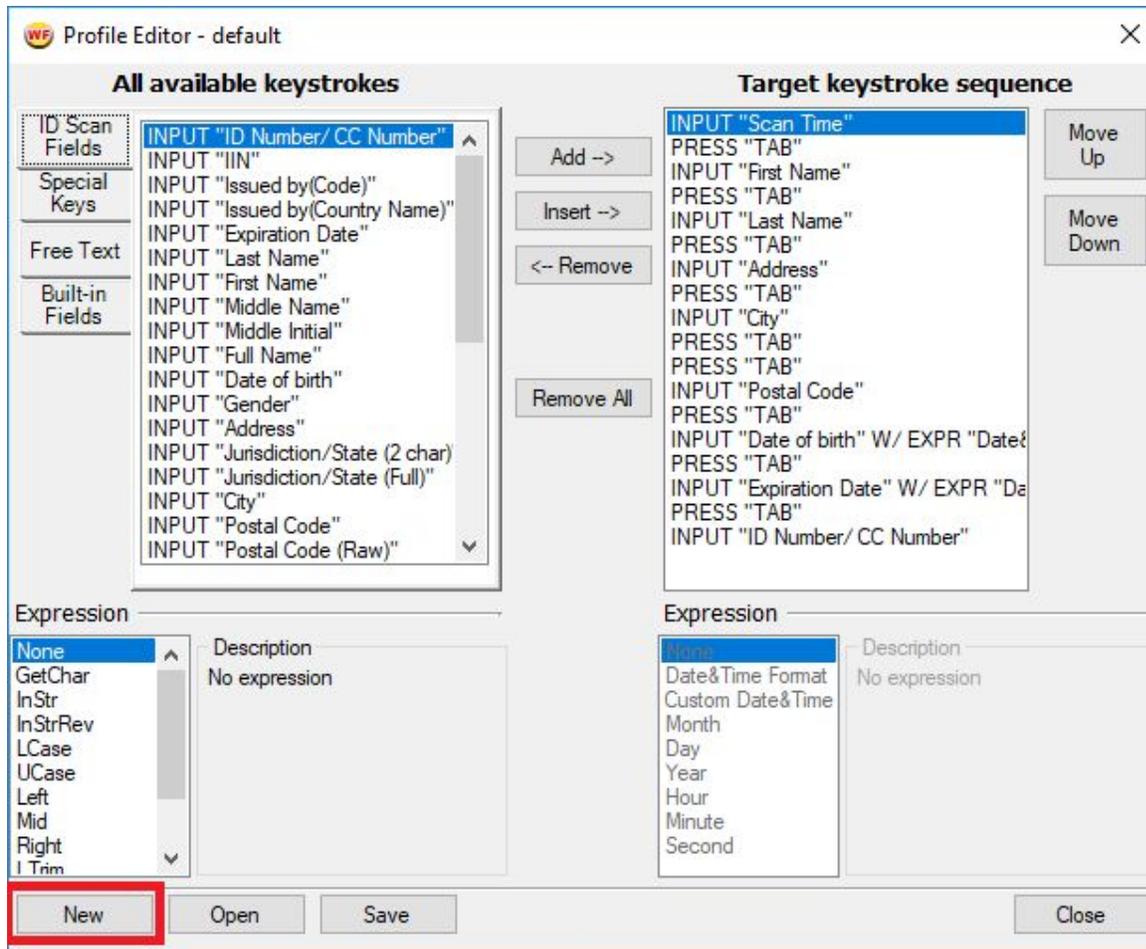The same applies to where the photos are being stored.

Creating a Profile

Profile Editor

From the WizzForms menu, select Profile Editor to begin mapping your profile.

The Profile Editor contains 4 different sets of inputs: ID Scan Fields, Special Keys, Free Text, and Built-in Fields.

Start the profile off by selecting New at the bottom left. From here, give it a name.

Take a look at the document or form to be filled out. With every profile, start at the first field that will be auto-populated.

A	B	C	D	E	F
Scan Date/Time	First Name	Last Name	City	Postal Code	ID #

In the sample Excel spreadsheet above, column A reads **Scan Date/Time**. Fields dealing with date and time can be found in Built-in Fields.

Select the keystroke RETURN "Now" and press Add.
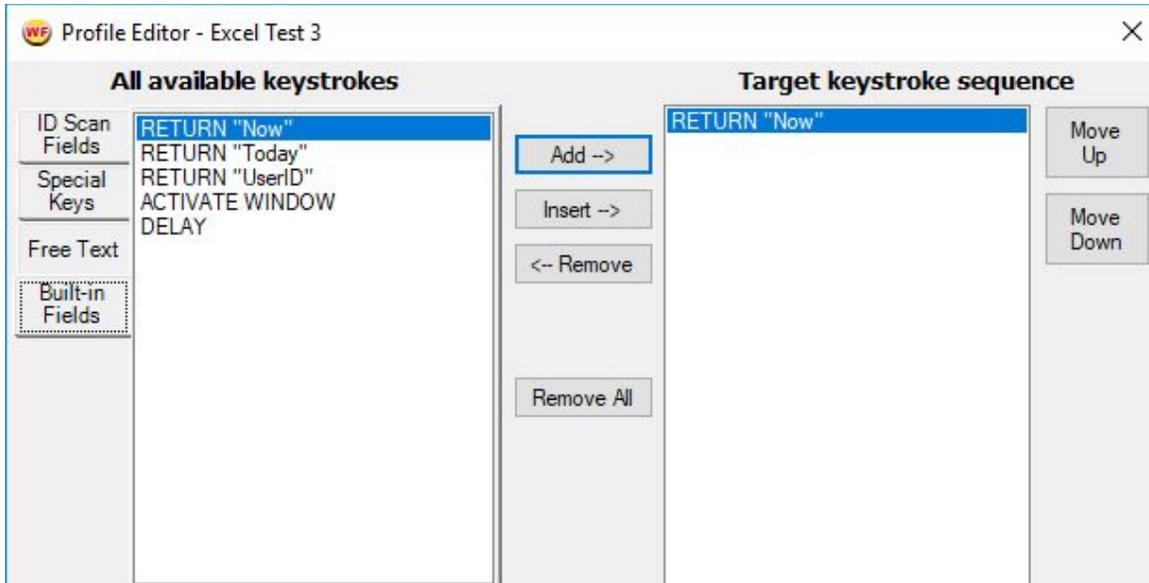
Save the profile and test thescan. In the screenshot below the scan date and time is now present in the document.

A	B	C	D	E	F
Scan Date/Time	First Name	Last Name	City	Postal Code	ID #
4/19/2018 11:12					

Before adding in the First Name as seen in the document, complete the steps needed to add a Special Key. Special Keys tell WizzForms where and how to move within the document to get to the next field to be filled.

The most common Special Key is Tab. This can be tested by starting at the first field and then pressing the Tab key on the keyboard. Pay attention to how the cursor moves around the document when Tab is pressed. For this document, one tab will navigate to the First Name Field.
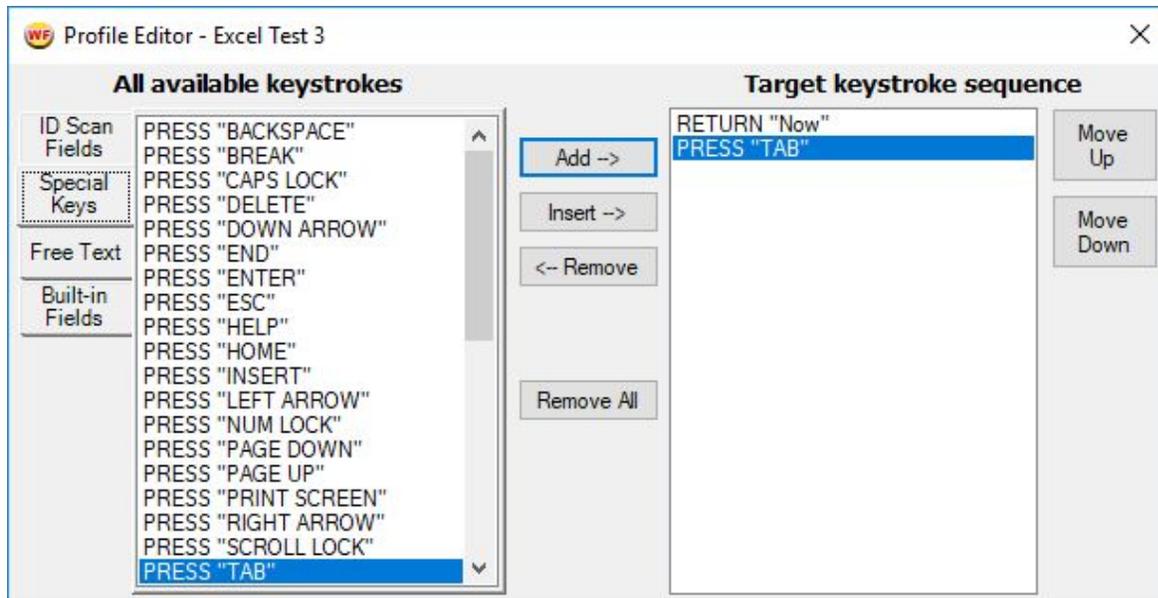
The First Name field is found within ID Scan Fields, as is the case with all info located on your ID.
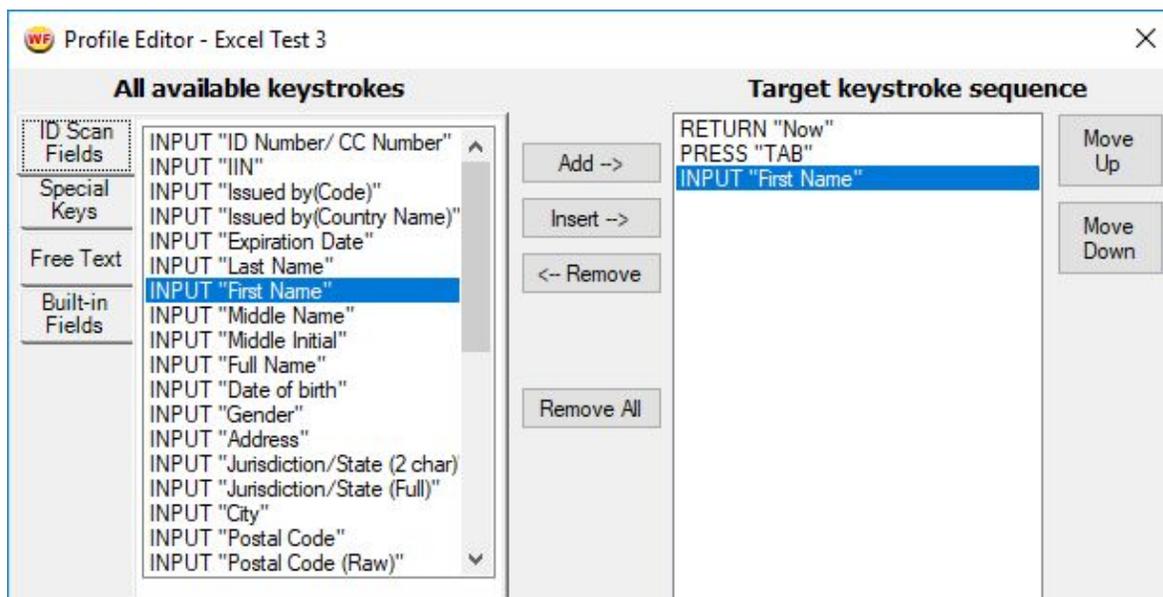
The completed profile is shown below.
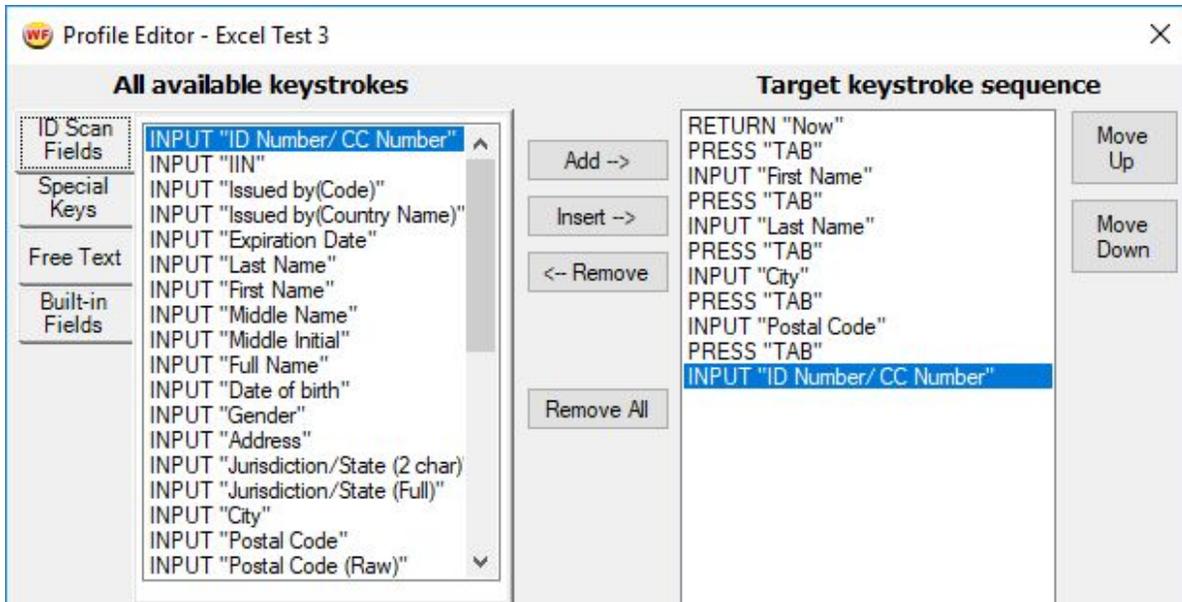
	A	B	C	D	E	F
	Scan Date/Time	**First Name**	**Last Name**	**City**	**Postal Code**	**ID #**
	4/19/2018 14:33	AMY	ZZZSAMPLE	MADISON	53705-2927	Z5140017266800

Creating profiles can sometimes require a bit of trial and error, especially with other forms more complex than this sample one.

Expressions

Located in the Profile Editor, then ID Scan Fields. Wizzforms can specify the output in specific ways listed. The data will be outputted normally when None is selected.

Custom Keystroke

Located in the Profile Editor, then Special Keys. A custom keystroke not listed in the above list can be added or removed here.

Free Text Menu

The Free Text Menu will allow any text to be typed and add it every time an ID is scanned. For instance, if registering attendees at a regional event, WizzForms can type "Event ABC in New York, NY" every time you collect data.

Activate Window

The Activate Window feature under the **Built-in Fields** tab will allow Wizzforms to automatically choose any program. It will open that program before running the keystrokes.

For example, if a Word document named "Example File"is set up to activate, when an ID is scanned, the computer will automatically open the document "Example File" and start entering an ID Number and First Name (as programmed below).
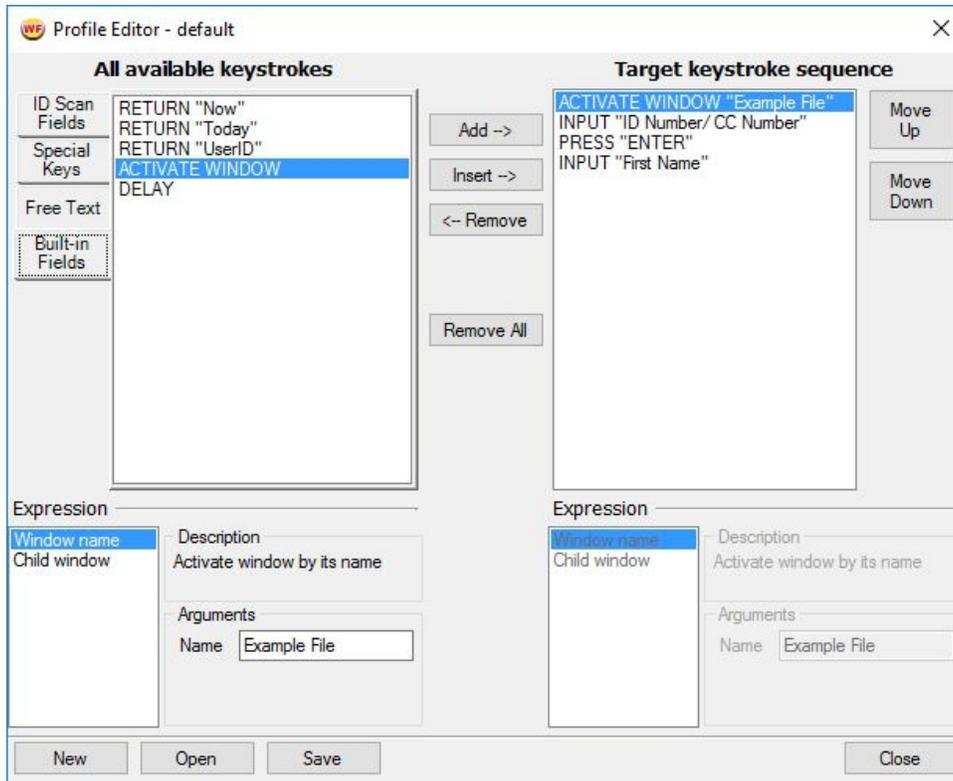
Delay

Located in the Profile Editor, then in the Built-in Fields. Using the Time option, Wizzforms will stop the output for a specified period of time (in milliseconds). Using the Key press option, Wizzforms will stop the output until the designated key is pressed.

Child Window

The Child Window feature allows for navigation to a program and the option to choose a window within that program (if applicable) to start entering in the keystrokes. For example, if a program called "Example Program" and within that program there is a window called "Example Window" and "Example Window 2".

When an ID is scanned, navigate to "Example Program" and "Example Window", Wizzforms will type the information, and afterwards navigate to "Example Window 2" within the same program, and enter more information.

Choosing a Default Profile

To choose a default profile for every scan, right click on the WizzForms app in the taskbar, go to **Profiles**, and select a profile.
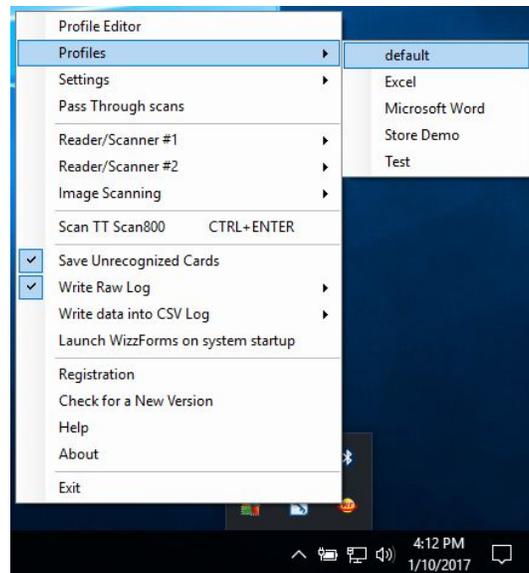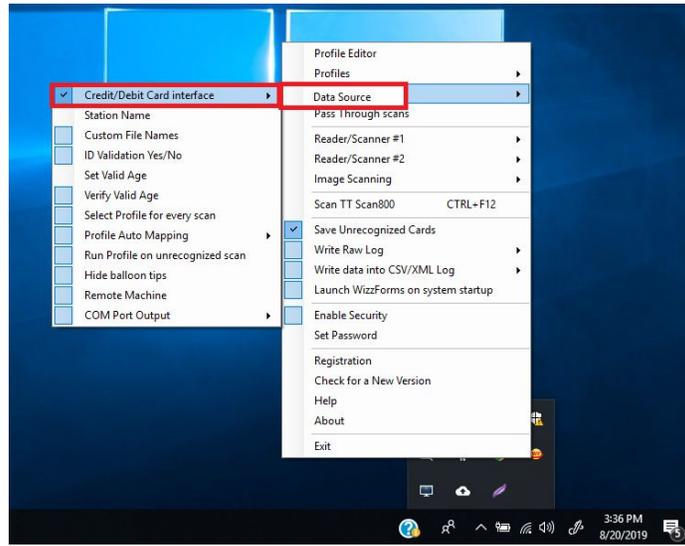

Settings

Credit/Debit Card interface

The Credit/Debit Card interface is a feature specific to WizzForms Plus and the M280 scanner. It allows the option to link images of an ID and credit/debit to a specific customer in order to combat chargebacks and fraud. **WizzForms encrypts the ID and Credit Card data.**

This data can then be used to generate reports with the images attached using the WF Report Viewer.

By navigating to Settings, there is an option for **Credit/Debit Card interface**. This menu will have one option: **Data Source**.

To begin using the Credit/Debit Card interface, first select it from settings and set up the Data Source and Name Station.

Important: This feature is designed to work with the E-Seek M280 scanner. The scanner is available for purchase from our website here: https://idscan.net/product/e-seek-m280/

Data Source

To use the Credit/ Debit card interface, the data source will have to be set using SQL Server Express and SQL Management Studio.

Alternatively, if SQL Server is already setup for the establishment, the already set up SQL server can be tied into WizzForms.

SQL Server Express and Management Studio can be downloaded from Microsoft's website here:
https://www.microsoft.com/en-us/sql-server/sql-server-editions-express
https://msdn.microsoft.com/en-us/library/mt238290.aspx.

Important: SQL Server 2016 only supports Windows 8 and above. If running Windows 7, please download SQL Server 2014 found here:
https://www.microsoft.com/en-US/download/details.aspx?id=42299.

After installing both applications, run SQL Management Studio. Management Studio will automatically assign a server name to the computer, see image below:
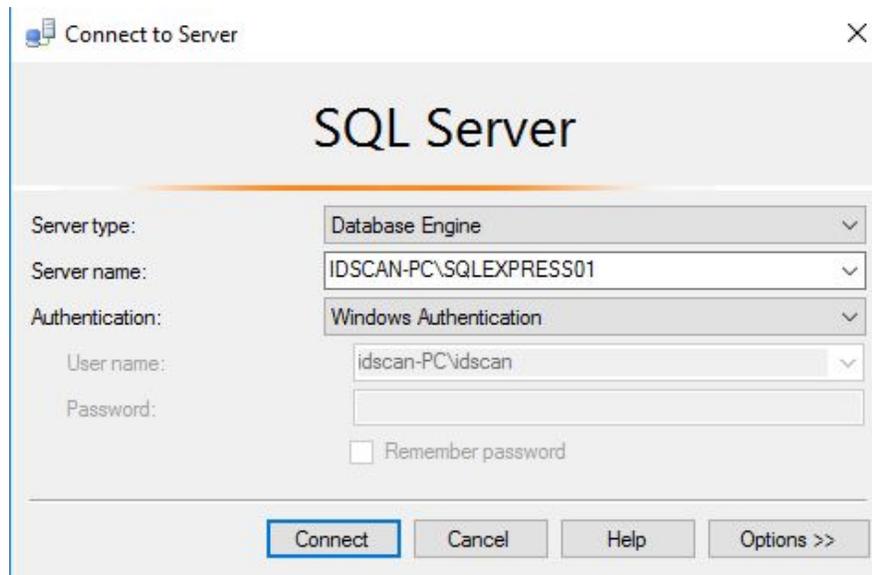

The options are to either use Windows Authentication or SQL Authentication. Be sure to take note of the server name, as it will need to input the address into WizzForms.
Navigate back to the Data Source within WizzForms and enter in the server name and database name. Select the correct Authentication, hit Deploy database, then OK.
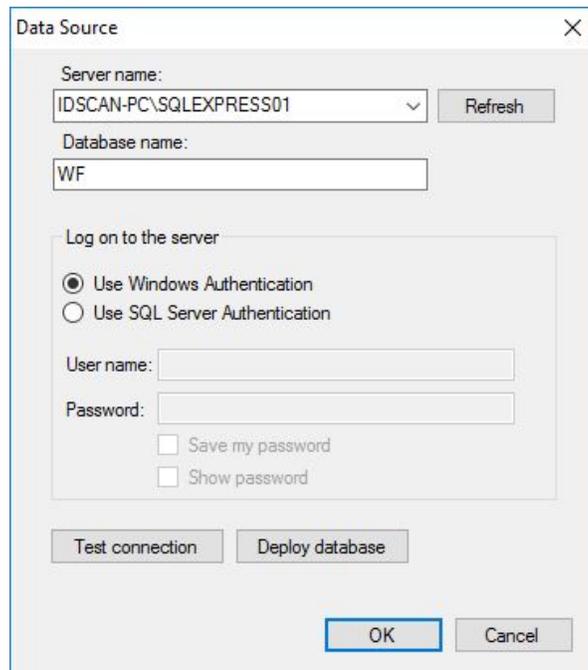
Station Name

Station Name allows the administrator to name the current workstation in order to more easily identify its purpose and location. For example, let's say there are two stations, one located on the north end of the building and the other on the south. Your station names could be North Station and South Station.
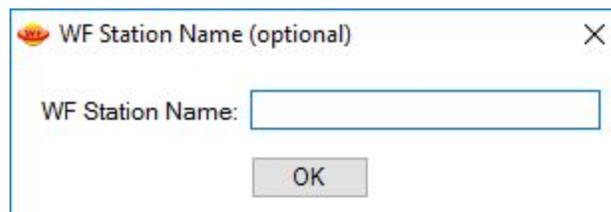
WF Report Viewer

To get a detailed view of the data and images that is captured, there is the option to download WizzForms Viewer. This can be downloaded from our website http://idscan.net/support/downloadsmanuals/.

WizzForms Viewer – v1.85.0

Download

Follow the instructions to install the software and then run it.

Enter in your server information like you did previously in WizzForms to point WizzForms Viewer to the correct database.
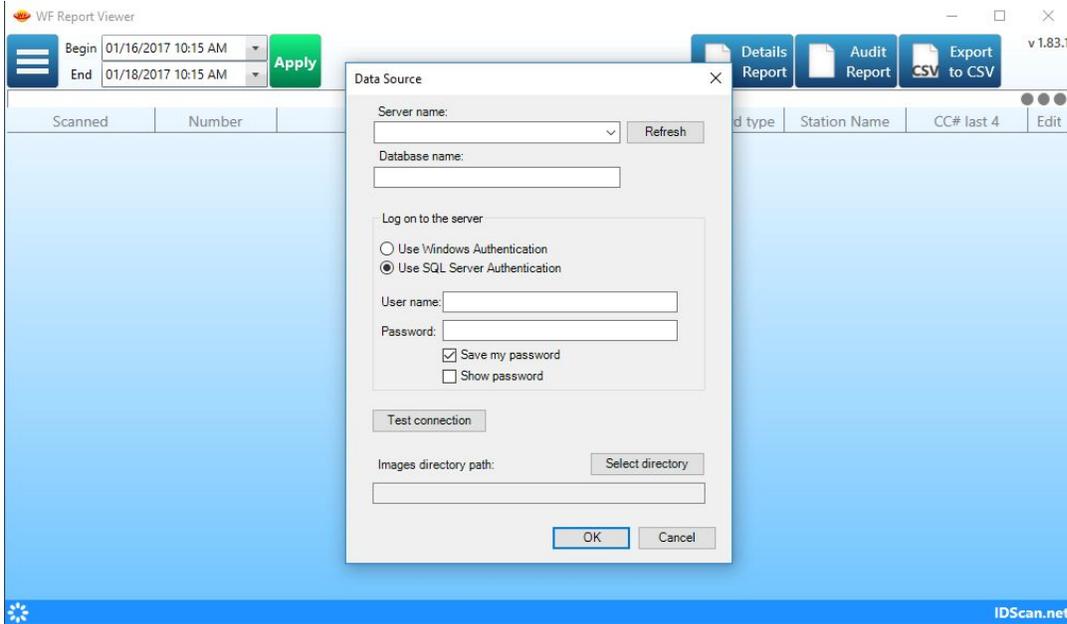
Using the Credit/Debit Card Interface

Scanning with M280

Once setup is complete, begin by scanning an ID into your application or web form of choice.

After the ID information has parsed, the scanner is now ready to take photos. Press F8 to open up the Credit/Debit Card Interface. Place the ID card on the glass and press the green button. the device will flash. If there is a need to capture a photo of the back, simply turn the card over and press the green button a second time.

Once the desired photos are taken the summary page will appear. Here there is the ability to review the ID information and photos taken. The **Previous** button allows the option to go back and rescan the ID.
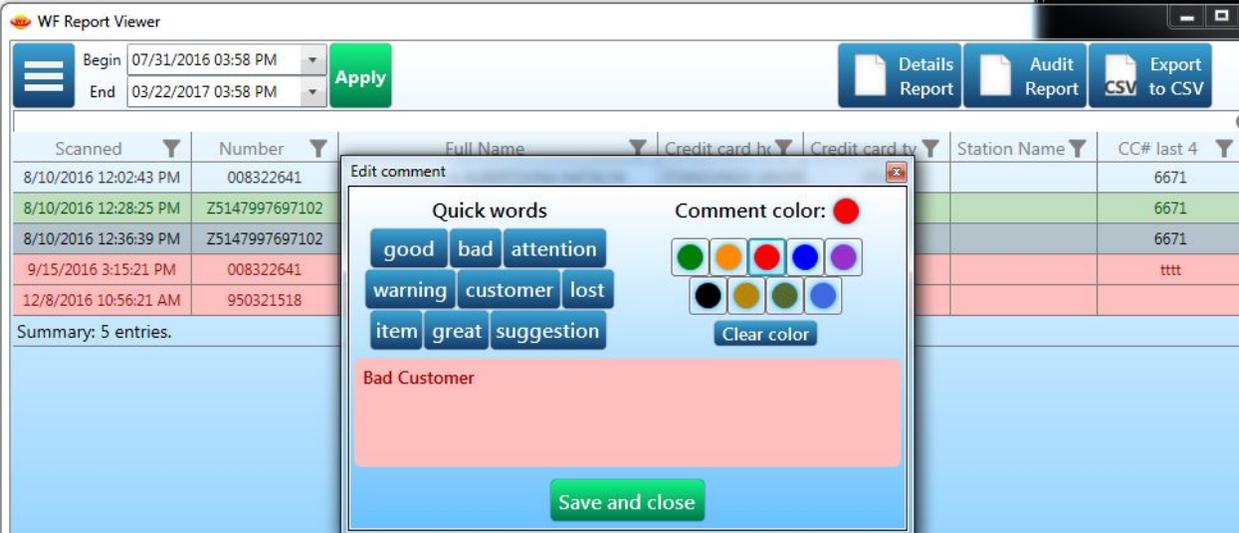
Using WF Viewer

Within WF Viewer,the ability to sort thescans by a number of different ways, whether by customer name, credit card type, or date/time scanned.

By clicking Edit on the right side of an entry, this allows the ability to make comments and assign colors to each entry in order to be more easily identifiable.

Once the data has been collected, there is the option to export and/or print it the data. By selecting Details Report, a report will appear on a single entry along with its associated photos.

Generating an Audit Report is a great way to isolate a customer and the credit/debit card used. It will also alert you if the names on the ID and credit/debit card do not match.

There is the ability to export the data to a CSV format. Do so by selecting Export to CSV.

Custom File Names

This enables the special file name format:
XXXXXXX-ANNNNN.txt - CSV File
XXXXXXX-ANNNNN.jpg - Image of ID
XXXXXXX-ANNNNN-Face.jpg - Face only
XXXXXXX-ANNNNN-Sig.jpg - Signature only
XXXXXXX can be changed under Station Name (computer name).

ID Validation Yes/No

The ability to turn on the verification of documents and the LED notification for Gemalto CR5400. The verification of documents includes checks such as an expiration of a document, a parser-specific validation and an existence of UV marks.
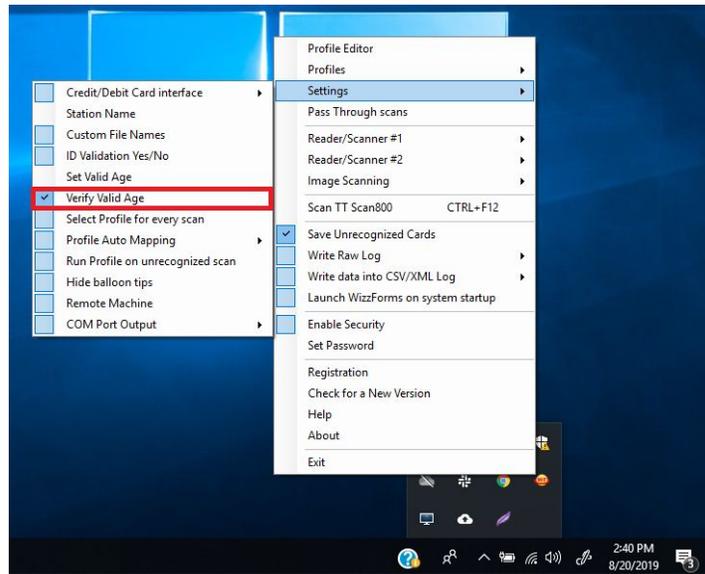
Set Valid Age

WizzForms allows the option to choose the valid age when scanning IDs. Whether the valid age needs to be 18, 21, or 25, WizzForms provides flexibility to meet any age verification.
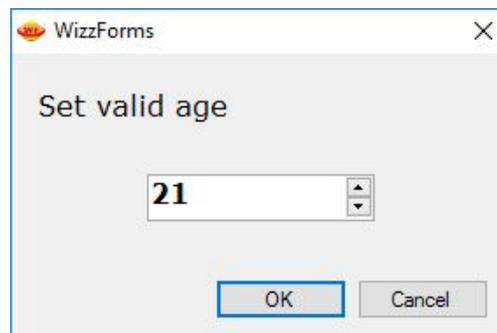

Verify Valid Age

WizzForms is capable of verifying age when an ID is scanned. To use the age verification features, go to **Settings** and choose **Verify Valid Age.**

Select a Profile for Every Scan

WizzForms can be customized to require the user to choose a profile for every scan. This setting is located under **Settings** and **Select Profile for Every Scan**. This is especially useful when there are multiple applications or pages to be populated.
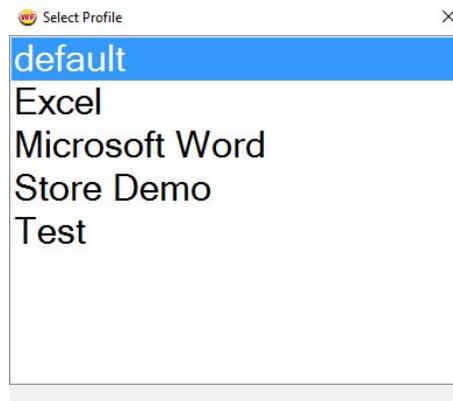
Profile Auto Mapping

With Profile Auto Mapping, WizzForms can detect which window/application to open and then select the appropriate Profile to match.
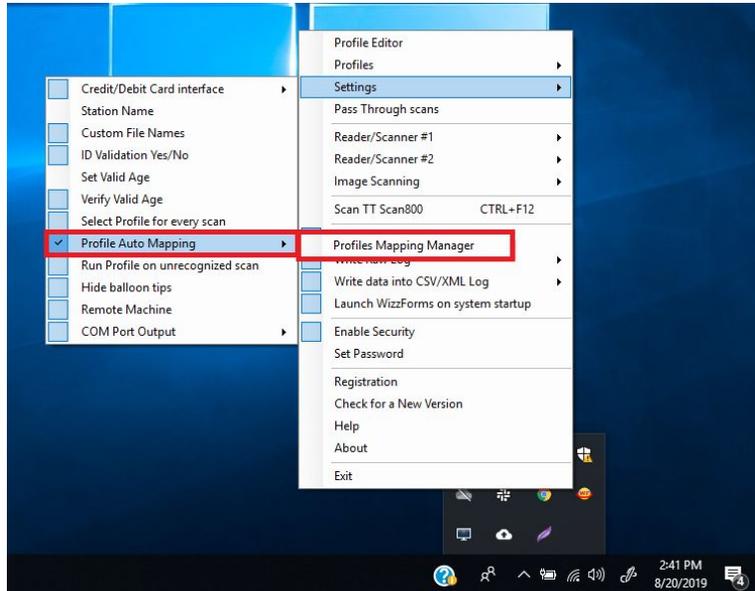
Once within the Profiles Mapping Manager, begin creating the custom profile mapping by selecting New Mapping.

Begin by selecting Window: Title.

Press Select/Identify Title, and then select the window/application to apply the auto mapping to.

From the drop down menu, select the Profile to assign to the selected window. After selecting the profile, depending on theWindow Title, there is the option to change how WizzForms will identify it.

For example, the Window Title in the picture to the left is Excel Test.xlsx, which is
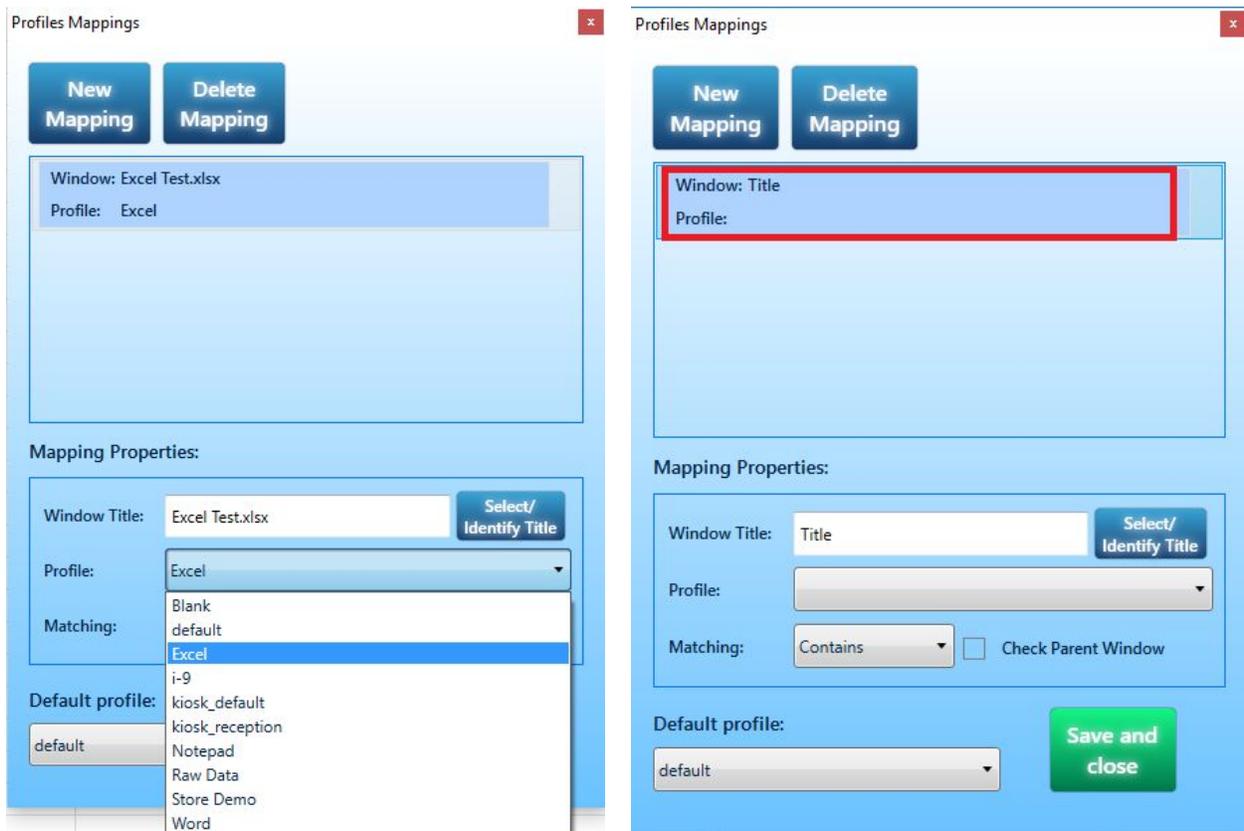
an Excel document. If I wanted WizzForms to recognize Excel and not a specific Excel document, I would change the Matching to Contains, as the window title for Excel always says the name Excel in it.

Press Save and close.

WizzForms will now be able to auto detect the application/window.

Run Profile on unrecognized scan

This feature was designed to work when the image of the ID needs to be scanned first and no additional data parsing needs to take place. Scanning the image first creates a file called Unrecognized.jpg.

Hide Balloon Tips

This will disable Windows from displaying notifications or balloon tips when WizzForms processes a scan.

Remote Machine

Enable Remote Machine if a remote environment configuration is needed.

COM Port Output

It enables sending data from a reader to a selected COM port through WF. **Attention!** Reading from a selected COM port requires a COM port bridge. A com port bridge is to be installed individually. COM Output Settings determines what data will be sent.

Pass Through scans

Enabling Debit/Credit Card Parsing

Under **Pass Through scans**, the option for enabling debit and credit card parsing is located here. Simply check the box to begin scanning debit and credit cards.
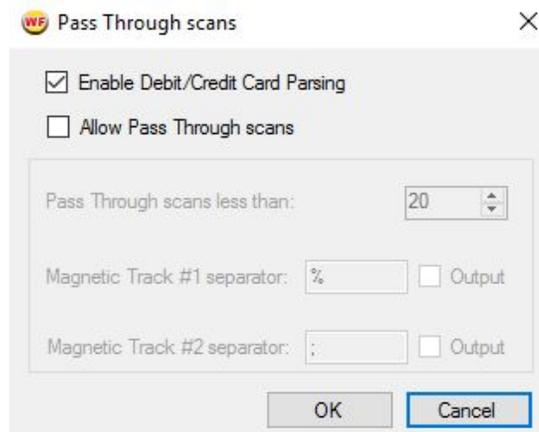
Allow Pass Through scans

Enabling Pass Through scans allow you to capture the raw data of a scan. This feature is helpful when scanning loyalty cards, company and student ids, and other non-government issued cards. This feature is activated by clicking the checkbox next to Allow Pass Through scans. As the character set stored in the identifier differs greatly the recommendation is to set the value to 3000.

Write data into CSV/XML Log Folder

In addition to importing the data into any web form or application desired, WizzForms will automatically import the data into CSV format within a specific folder.

This allows all the data to be stored in one document or the option to require a new document for every scan.

Launch Wizzforms on systems startup

By checking this option, Wizzforms will open up when the computer is booted on.

Enable Security

This feature when enabled locks all the settings in their current statuses. The user can still scan IDs but cannot change any settings. This feature can only be turned off with the correct password which can be set in **Set Password**.

Set Password

User can choose a password that will be used for the **Enable Security** feature.

36

Check for a new Version

This feature will check for a new version of Wizzforms. If a newer version is found, it will ask to begin the update process. However, If the current version is the newest version, nothing will be needed to be done.

Help

This feature will provide a downloadable copy of this manual.

About

This feature will give the general information of this version of Wizzforms, registration status, and the support teams info. Feel free to call or email our support staff for any further questions.

Troubleshooting

Write Raw Log

If the scanner is not working properly, in order to allow for troubleshooting the issue. Right click on the WizzForms icon in the system tray and choose the option **Write Raw Log**, scan an ID, and email the file to support@idscan.net. To find the raw log file right click the WizzForms icon in the system tray and hover over **Write Raw Log** then click **Open Folder.**Inside this folder is a file please attach this to the email with any other important details.

Save Unrecognized Cards

If the ID scanner is not reading the ID correctly, check the **Save Unrecognized Cards** option, and send us the file. The file is located under **Write Raw Log** and **Open Folder.**

<u>Contacts</u>

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