ID Card Production Process Workflow

with Access Control Integration

AUXILIUM

OVERVIEW

When new members of staff are added to the HR system and an export is run for newly joined staff, our system (iCard) will recognise these users. Your ID card department will then see these users on their PC screen as new members without an ID card.

Your ID card department can then automatically trigger an email to these new users, requesting them to submit the necessary details for their ID card online. The form will ask users for their job title and department while allowing them to submit a photo from their PC or device for use on their ID badge.

The contents of the form will automatically be sent back to the ID card department, which can then assign the appropriate access control level in the Paxton access control system based on departmental or individual requirements before printing the ID card. If a user is not included in the HR feed (e.g., contractors, volunteers, long-term visitors), they can be manually added, and an email will still be sent to request their details. This automation minimises manual effort, reduces errors, and speeds up the ID badge creation process.

This web-based system will be set to be internal only with no access to the outside world for safe keeping of data.

There is also the option of using SSO for all the forms being data can be cross checked with Active Directory accounts and populating data this way for ID Card Production.

The system is fully networked to be able to be access across the site with the aim of meaning people do not need to visit your ID card department for Badge Printing, they will only collect them from there when ready or other points in the building.

The printers are also networked needing no host PC so, badge can be printed to different departments, say for example reception in A & E therefore reducing time the staff visit the ID card department.

The system is designed to reduce time and effort and errors in the ID Badge Production Process. The system is also designed to fully integrate with Paxton Net2 Access Control system, therefore keeping the data the same across your various systems.

When a person on site needs a new badge, they can simply go to a URL, for example, https://idbadge.yourtrust.nhs.uk and request a new ID Card through the same process but without being asked to be initiated it over email.

The system also then allow a leavers process to be run automatically from a CSV exports mean good housekeeping of data and systems.

1.1 PROCESS A – STAFF INCLUDED IN HR FEED/ EXPORT (OR BULK IMPORTS)

For bulk ID card creation, the ID card department will receive a CSV export of new staff members from HR. The CSV file must contain the following fields:

· Email Address
· First Name
· Last Name
· Pick Up Location
· Department
· Job Role
· Line Manager (Optional)

This CSV file is uploaded into the iCard production system, displaying all new users who have not yet been issued an ID card.

This CSV file containing any new users would be loaded into your iCard Production system running on your site, displaying to the ID card department all new users who have not had ID Card issued yet. (Fig 1.1)

Fig 1.1 Bulk Import for Multiple Users from Spreadsheet File Export from HR

Your ID card department will have the option to:

· Send an email with a form link automatically.
· Manually send an email if additional details are needed.
· Copy and paste the form link into an email for manual distribution.

Fig 1.2 Users sent out webform for data collection

The 'Not Submitted' tab above (fig 1.2) refers to the user not having submitted their details, i.e. their Photos, Job Title and Department. The link has an expiration period (recommended: 7–10 days), stated in the email, encouraging users to take prompt action.

2.1 THE END USER/ ID CARD REQUESTOR

When the new users get the email, there will be a within link to fill out the online form. The email sent out will be similar to Fig 2.1, but ultimately based on your requirements. The form will look as per Fig 2.1 but this but will be fully customised to match the trusts requirements and branding and adapted to fit in work your workflow.

Fig 2.1 Email Sent Out to user needing an ID Card

Fig 2.2 Form to be filled out by ID Badge requestor

2.2 PHOTO CAPTURING

Users can either upload a photo or take one using their device. The system will run an automated check for proper exposure, background clarity, and neutral expression (aka passport photo checker). Alternatively, users can visit the ID card department to have their photo taken, where the same algorithm will apply to ensure consistency across all ID badges.
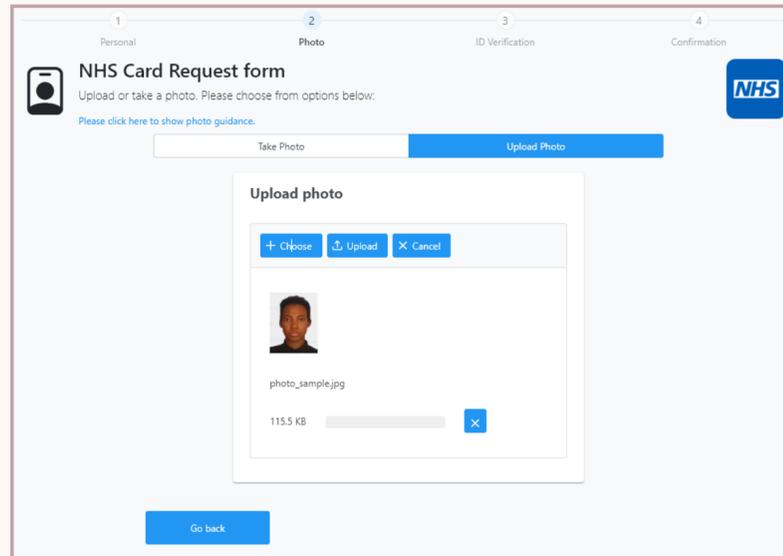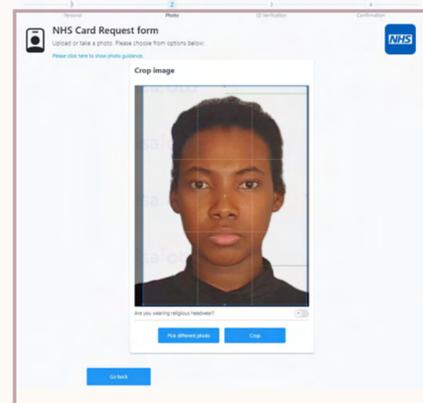
Fig 2.3 Photo Upload Page

Fig 2.4 Photo Then can be cropped to ensure it fits the matching aspect ratio on the ID Badge.

2.3 ID VERIFICATION

An optional step allows users to upload ID verification for additional security. This feature can be enabled or disabled in settings. Due to the handling of sensitive data, discussions are required to determine storage policies. By default, any digital documents stored on a local server will be deleted after verification

2.4 USER CONFIRMATION BEFORE SUBMITTING

Once the user has filled in all their detail and uploaded their photo, they will be asked to check all the details before submitting the form, the page will also display a preview of their ID Badge, which the intention of users more likely to spot an error if presented with a preview.

Fig 2.5 Final Check Before Submission
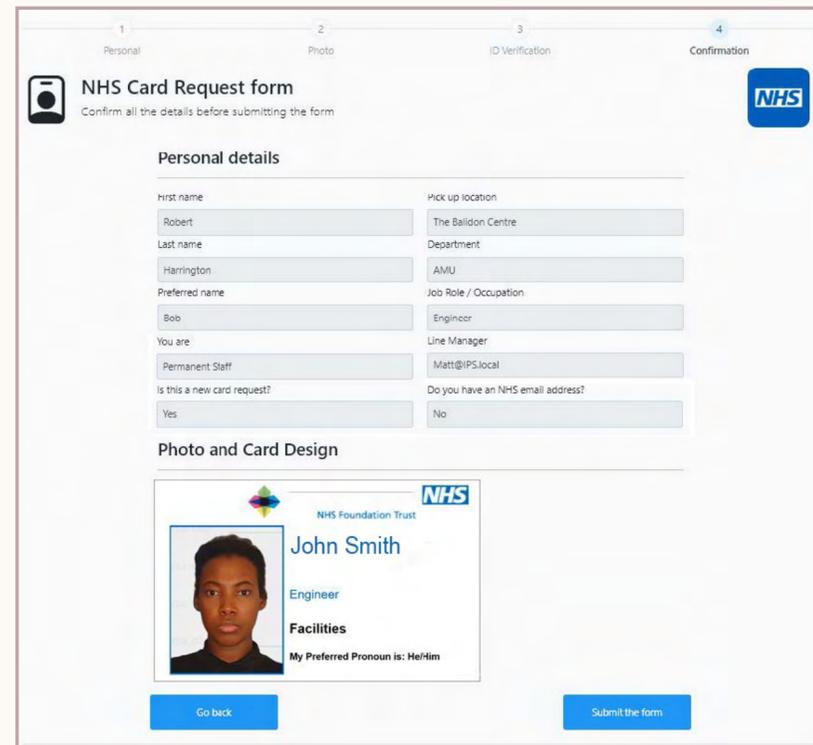
3.1 SINGLE USER REQUEST EMAIL SEND – FOR EXAMPLE, CONTRACTORS, VOLUNTEERS.

To create ad hoc, or single requested for data for single ID Card prints, your ID card department will fill out the form as per fig 3.1.

Fig. 3.1 Request ID Badge Data For a Single User
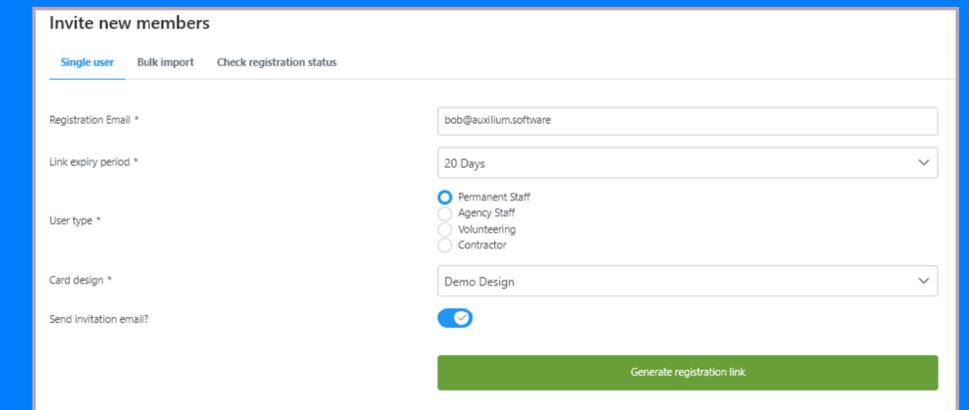
The process is the same as bulk uploads but just a single user is alerted by email to fill out the form and submit their photo.

4.1 APPROVAL PROCESS

Once a user submits their form, your ID card department will see a list of pending approvals. Clicking 'Review' allows staff to:

· Verify the submitted photo.
· Check access level requirements.
· Approve, edit, or reject the request.

Fig 4.1 List to be reviewed for approval.

This then gives your ID card department the ability to review what the user has been submitted and a preview of their ID Card, fig 4.2.

Likewise with a declined click, a note is added and then the email will be resent to the user with the reason for the decline and allowing them to resubmit their details. Once the user is approved, their ID Card will be in the appear the approved tab, and the card is ready for printing.

Fig 4.2 Review Screen the Security Department will see

Fig 4.3 Once approved is clicked, an optional note can be added to the ID Badge record

auxilium.software
hello@auxilium.software

Fig 4.4 On approval the user will also get an email

Oakworth University Hospital

Hello Robert Harrington,

Your ID badge has been approved and is now pending printing.

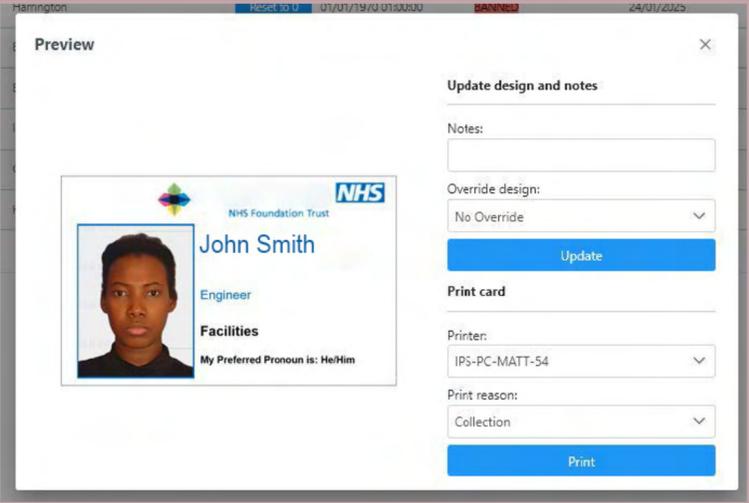Please visit

Yours faithfully

The ID Badge team
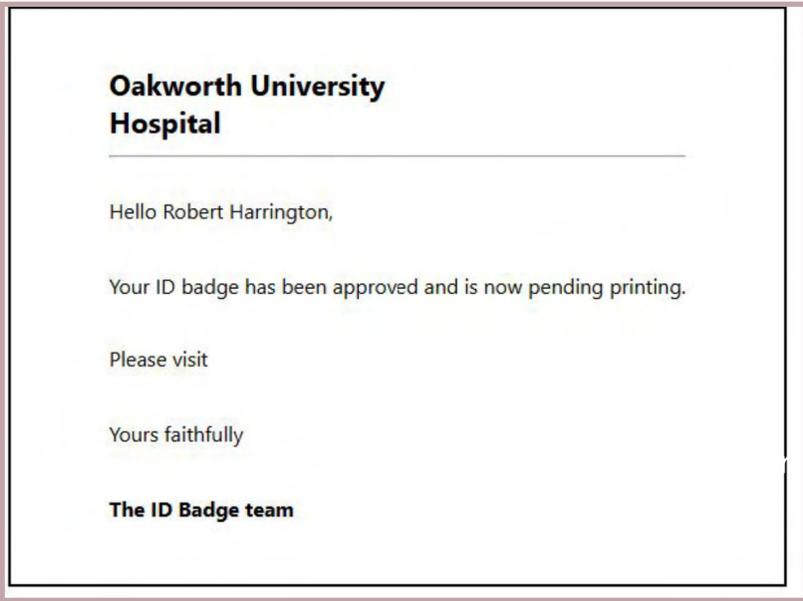
5.1 ID BADGE PRINTING

Once an ID badge is approved, it will be ready for printing. It will move to the "Newly Approved Members" section and remain there until printed.

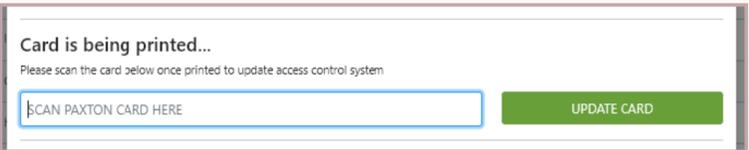Fig 5.1 Newly Approved Members List

Fig 5.2 Print Preview

When 'Print' is selected, a preview appears, allowing ID card personnel to:

· Add notes to the print record.
· Select a printer, which may be in another department.
· Choose a print reason (e.g., collection, reprint, temporary badge).

After printing, a dialogue box will prompt the user to tap their card on a connected reader to send the data, photo, and access level information to the Paxton Access Control System.

Fig 5.3 Update Card On To Paxton System

Card is being printed...
Please scan the card below once printed to update access control system

SCAN PAXTON CARD HERE   UPDATE CARD

After the Card is printed the dialogue box in Fig 5.3 will stay on the screen until the user taps the card on to a connect reader to the PC – This then sends all the collected data and photo and access level to the Paxton Access Control System

5.2 REPRINTS / STANDARD SECTION FOR PRINTING

Fig 5.4 Standard User List for Printing

If an ID badge needs reprinting, your ID card department can access the 'Standard Staff Print' section with the following options:

· **Print** – Reprint an ID card.
· **Encode** – Push user card details into the access control system.
· **Temp** – Issue a temporary badge (pre-printed, reusable, with access mirroring the main card). The original card is blocked until the temp card is returned or expires (e.g., 24 hours).
· **Photo** – Capture a new photo.
· **Slip** – Print a temporary slip for ID verification without access control.
· **Block** – Disable an ID card across the entire access control system.