HID TRISM™ 7.x Financial Instant Issuance

User Guide

Software Version: 7.0.4100
PLT-07642, A.0
June 2024

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Contacts

For technical support, please visit: **https://support.hidglobal.com**.

What's new

Date	Description	Revision
June 2024	Initial release.	A.0

A complete list of revisions is available in **Revision history**.

Section 01

What is TRISM 7?

1.1 What is TRISM 7?

TRISM™ 7 is a unique hardware and software system that provides all the tools needed for the creation and distribution of financial cards of any kind.

Initially introduced in the late 1990s, TRISM provides instant and central issuance of Visa and Mastercard credit and debit cards to financial institutions worldwide.

TRISM works seamlessly with the PCI-certified and listed Hardware Security Module (HSM Duo and HSM XT) to ensure complete privacy of cardholders' information.

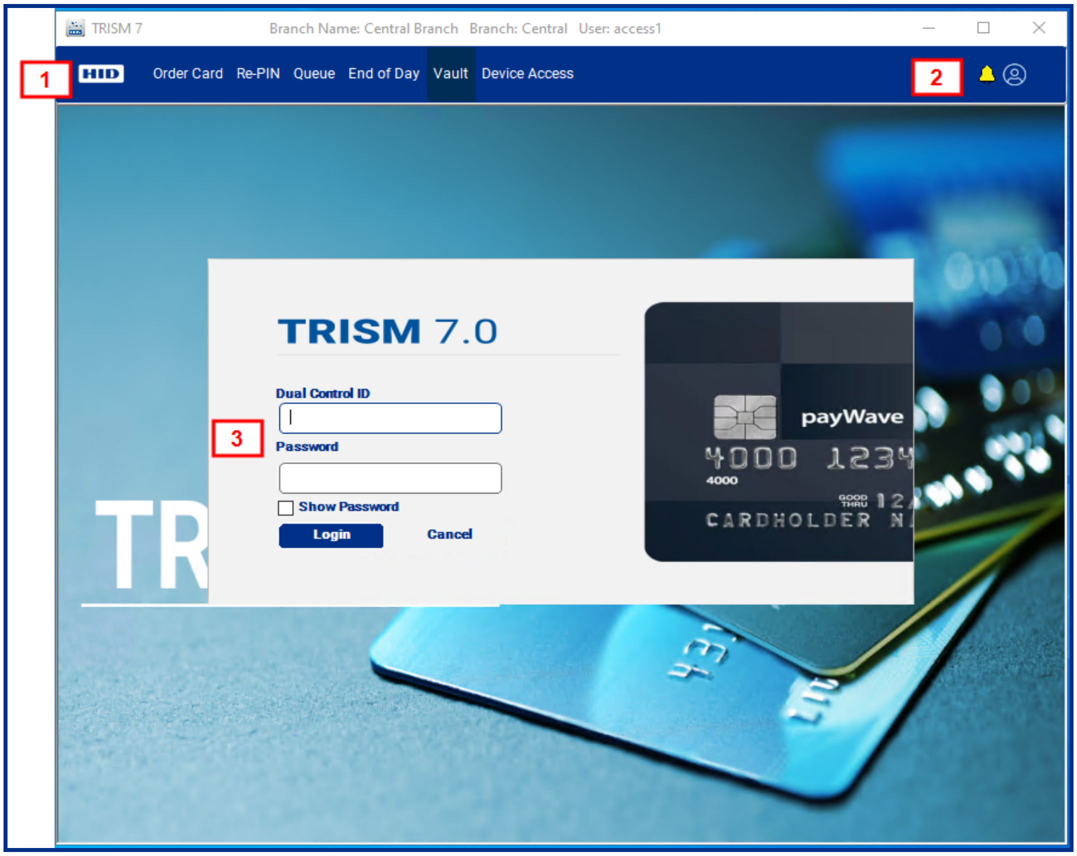
From centrally issued, pre-printed cards to customer created cards available for immediate use, TRISM 7 boasts the versatility to meet any institution's most specific demands.

1.2 How to use this manual

The TRISM Administrator Manual is intended for use by TRISM installation and technical support only.

This manual is organized chronologically. First, you will find instructions for installation and configuration, then information pertaining to version updates or new service installation. The TRISM menus (Request, Queue, and so on.) follow this and provide general instructions on how to use each of these menus. Finally, the Appendix includes post-installation information such as Template permission descriptions and troubleshooting procedures.

1.3 TRISM 7 user interface



1. Quick launch toolbar.
2. Personal account menu.

> **Note:** This is referred to as the **Personal icon** within this document.

3. Dual Control Login. Some TRISM features require a second user that is different than the user currently logged in (and with the appropriate permissions), to enter their login credentials.

Section **02**

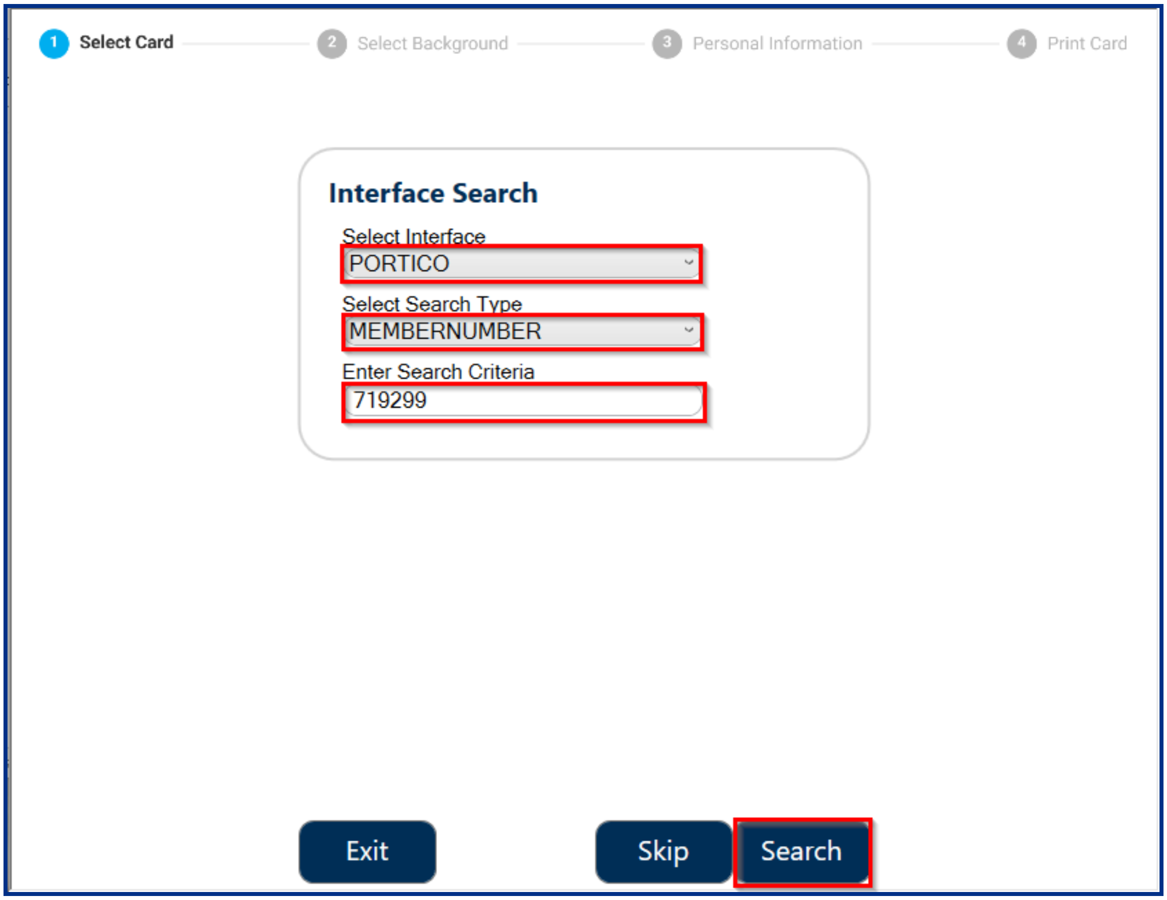
Request

2.1 Order Card

1. Interface search

   a. From the **Quick launch** toolbar, click Order Card or from the **Personal account** menu, click **Request** > **Order Card**.

   b. The Interface Search window is displayed. Select the appropriate BIN from the **Select Interface** drop-down menu.



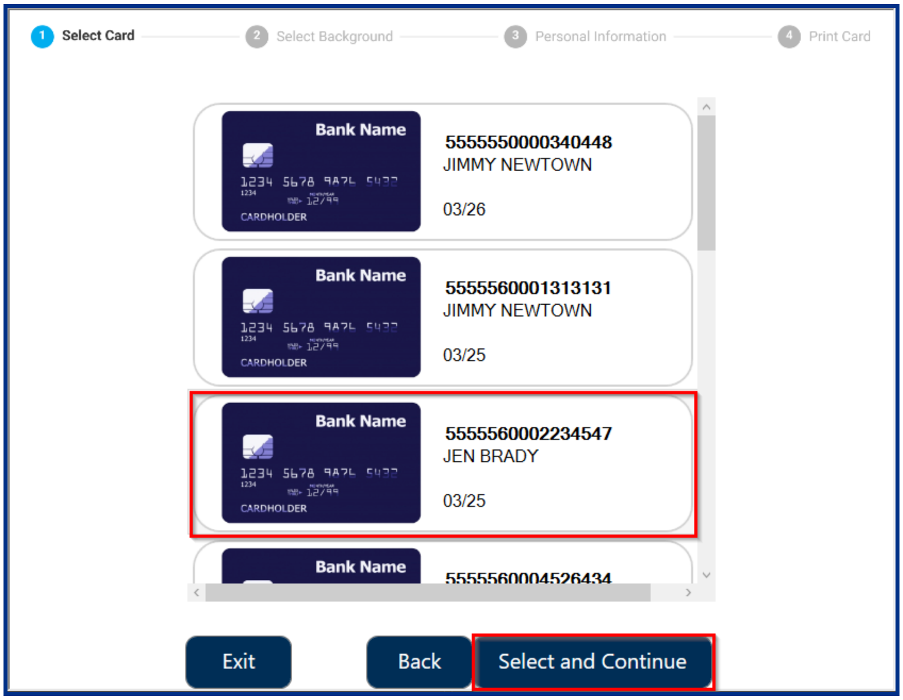
   - **If a core/processor interface is used**: select the interface, search by member or card number, and enter the member or card number. **If searching by card number**, the cardholder's information is populated in the information fields. **If searching by member number**, select the corresponding account in the bottom menu, then the account's information is populated in the information fields.
   - **If a core/processor interface is not used**: complete the address information, security information, and contact information fields. After step 3.c, click **Accounts** in the **Account Information** menu, then enter the **customer's account number** and **ChkSavDesignator**. One account must have **Primary** selected.

   c. Select the search type from the **Select Search Type** drop-down menu.

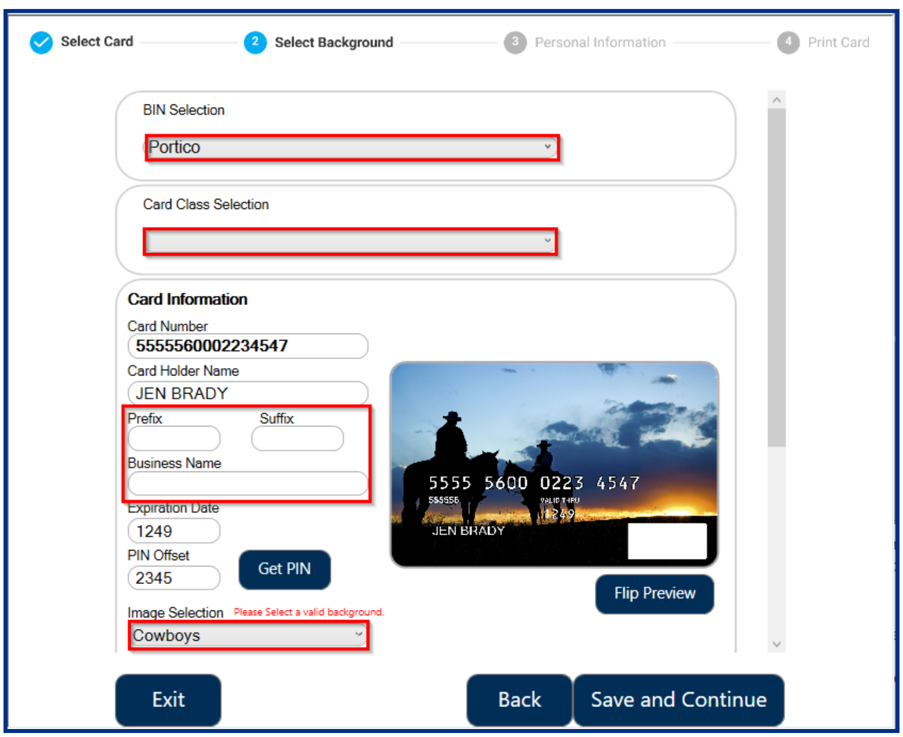
   d. Enter the search criteria in the **Enter Search Criteria** drop-down menu.

   e. Click **Search**.

2. The search results are displayed. Select the appropriate account number, then click **Select and Continue**.



3. Card information



   a. Select a BIN from the **BIN Selection** drop-down menu.
   b. Select a card class (if any) from the **Card Class Selection** drop-down menu.
   c. If not automatically generated, enter **Prefix/Suffix/Business Name** (if any) in the provided fields. Also enter the card's **Expiration Date**, if not automatically generated.
   d. Select a PIN method.

e. Click **Get PIN**. The PIN is generated if specified, otherwise, the PIN pad beeps.

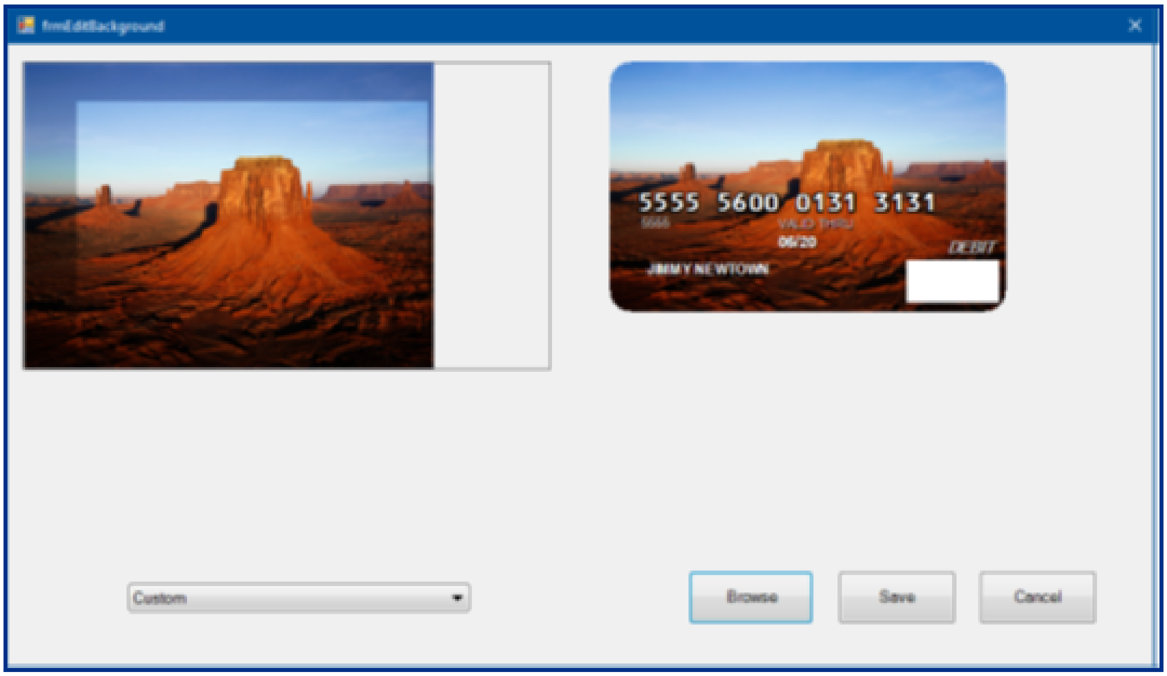
> **Note:** The Verifone Vx805 and P200 PIN pads do not have the beep functionality.

f. Enter the desired PIN on the PIN pad. Press the green **Enter** button. The PIN pad beeps again. Re-enter the PIN and press the green **Enter** button to confirm the PIN.

g. The card's offset is displayed after the PIN is entered.

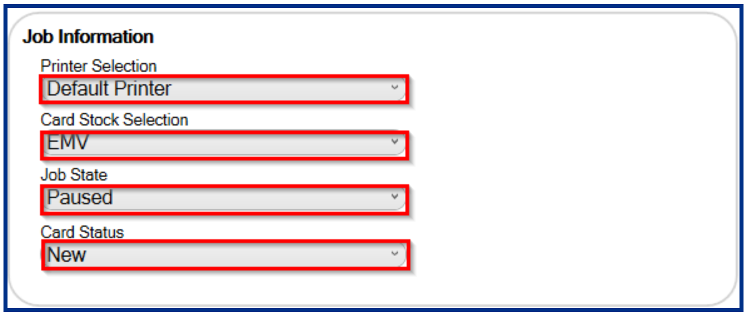
4. Personalizing and Previewing Cards – See section **A.3 Custom image guidelines** for image guidelines.

   a. Select a gallery image from the drop-down menu or click **Personalize**. If only one image is in the gallery destination folder, that image displays automatically.

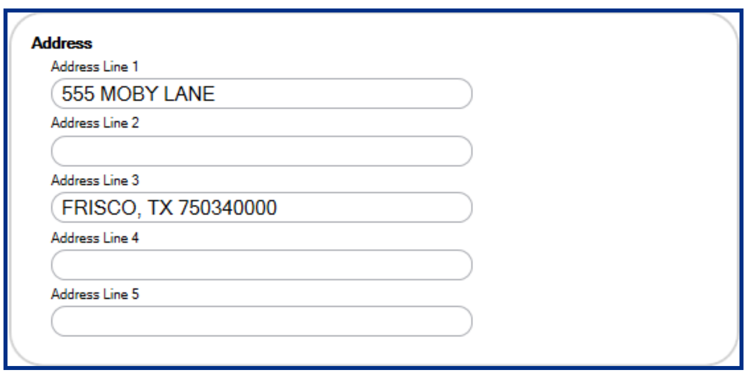


   b. Click **Browse** and navigate to the folder containing the custom image.
   c. Select the image and click **Open**.
   d. To crop the image, click and drag an area on the image on the left.
   e. If applicable, select the desired template from the drop-down menu in the bottom left of the screen.
   f. Click **Save** when personalization is complete.
   g. Click **Back** to preview the backside of the card.

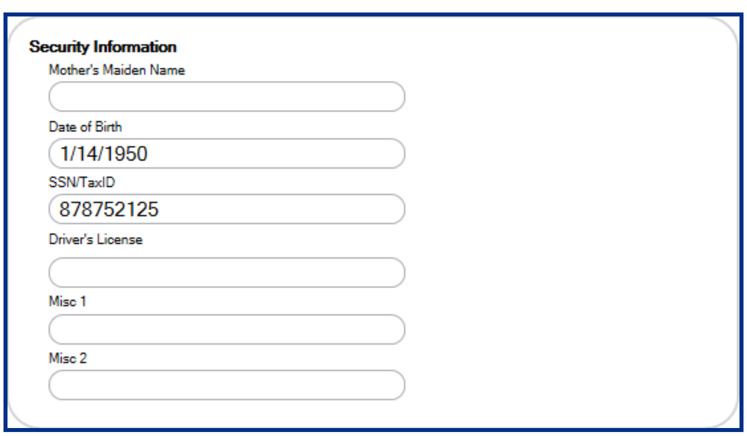
5. Job Information



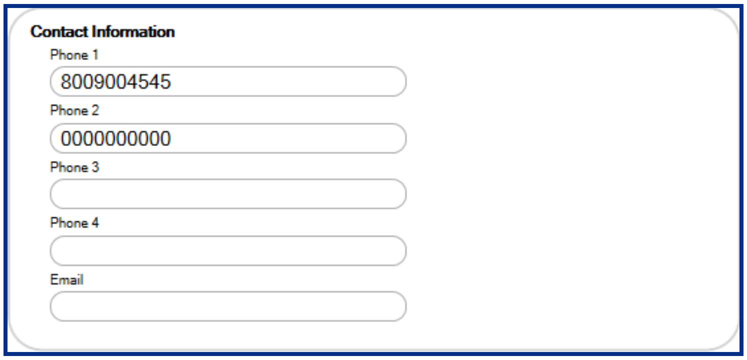
   a. Select a printer from the **Printer Selection** drop-down menu.
   b. Select a card stock from the **Card Stock Selection** drop-down menu.
   c. Select a state from the **Job State** drop-down menu.
      - **Ready:** card prints immediately upon completion.
      - **Paused:** card does not print until state is changed to Ready in the Queue.
      - **Manual:** card does not print until it is manually fed into printer (not available with all printers).
   d. Select a card status from the **Card Status** drop-down menu.
6. Click **Save and Continue**.
7. Fill in any missing Address Information.



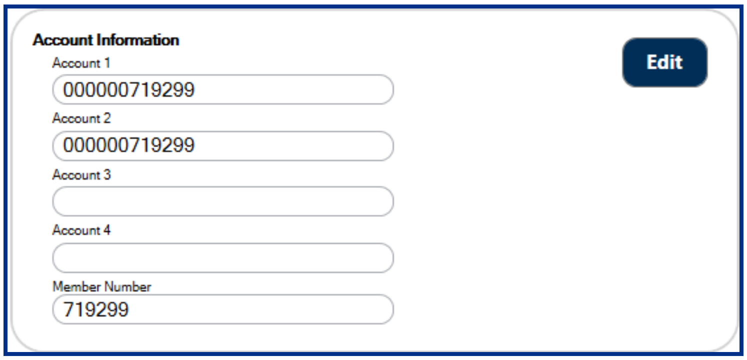
8. Fill in any Security Information.



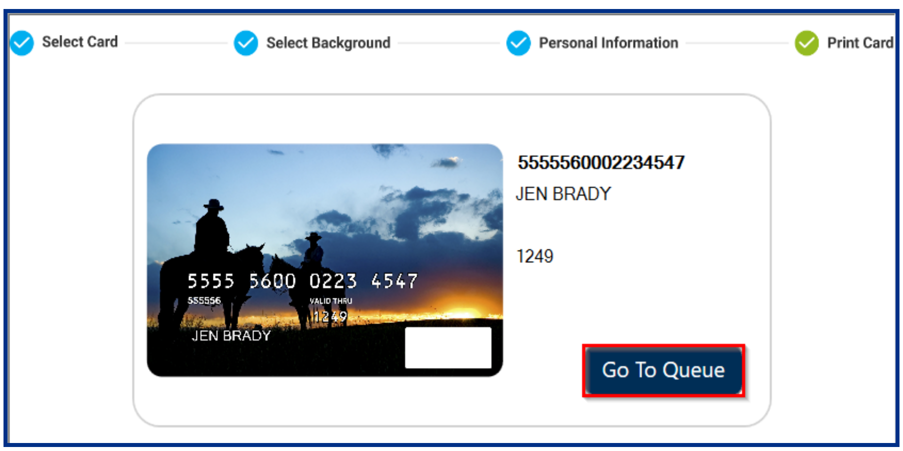
9. Fill in any contact Information.



10. Fill in any account information.



11. Click **Save and Continue**.
12. Click **Go To Queue** to send the card to the printer queue.

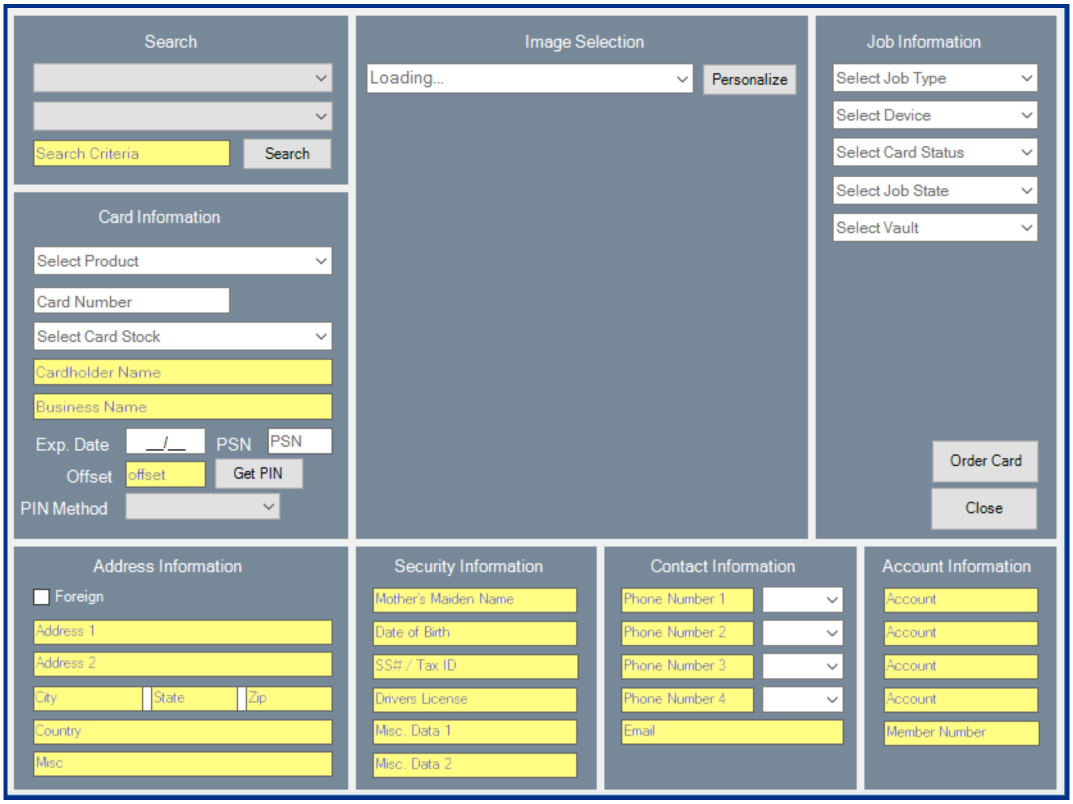


2.2 Edit Permissions

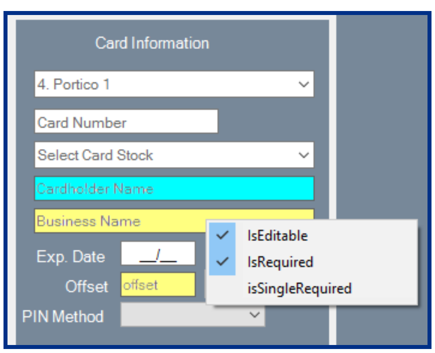
The **Edit Permissions** window allows a user to make certain fields in the **Order Card** window editable or required.

On the main menu, click the **Personal icon** > **Request** > **Edit Permissions**. Select a card type to edit its permissions.

In the following screen, the fields highlighted in yellow have editable permissions.

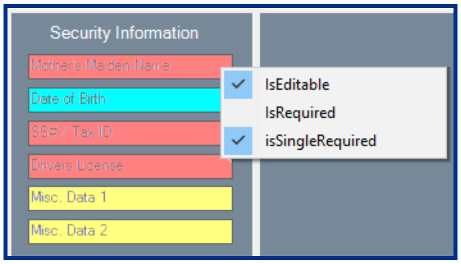


You can change the colors of the **Editable**, **Required** and **Single Required** fields in **7.2 Theme**.



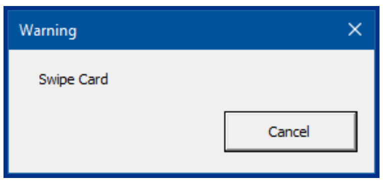
- **IsEditable**: enables input of text.
- **IsRequired**: field must be filled to complete request.
- **IsSingleRequired**: one out of all Single Required fields per panel must be completed.

For example, in the Security Information panel, **Mother's Maiden Name**, **SS#/Tax ID**, and **Drivers License** are single required, so one of these three fields must be completed to process the request.



2.3 Re-PIN

1. On the main menu, click the **Personal icon** > **Request** > **Re-PIN**.
   - If the PINpad has a card reader, a window prompts you to swipe the card to re-PIN.



   - If a card reader is not used or the card is not available, the **Order Card** form is displayed for card number information entry.
2. Select the PIN method, enter or generate the PIN.
3. Click **Complete**.

2.4 Read a Card

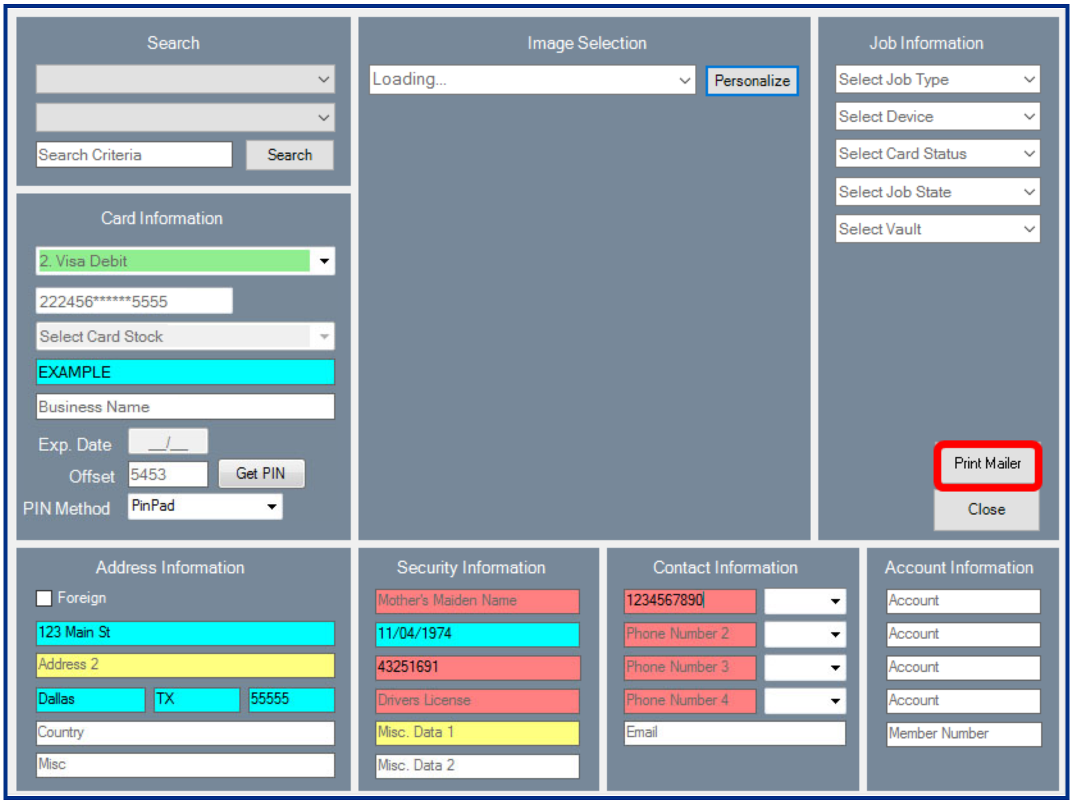
On the main menu, click the **Personal icon** > **Request** > **Read a Card**.

If a PINpad with a card reader or USB card reader is detected, you can swipe a card to display its track data (Card Number, Format Code, Expiration Date, and so on).

Field Name	Data	
Format Code	B	
Card Number	5555560002234547	
Name	^BRADY/JEN	
Expiration Date	2006	
Service Code	101	
Member Number	1	
Offset	3386	
Misc. Data	0000000000	
CVV	123	
Misc. Data	000000	

2.5 PIN mailer

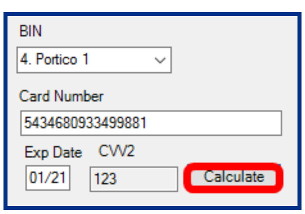
A PIN mailer can be printed in this window if one is not printed at the time of card creation.



1. Enter the customer's member number in the Search Criteria and click **Search**.
2. Select the desired card number to populate the customer information.
3. Click **Print Mailer**.

2.6 CVV2 Calculator

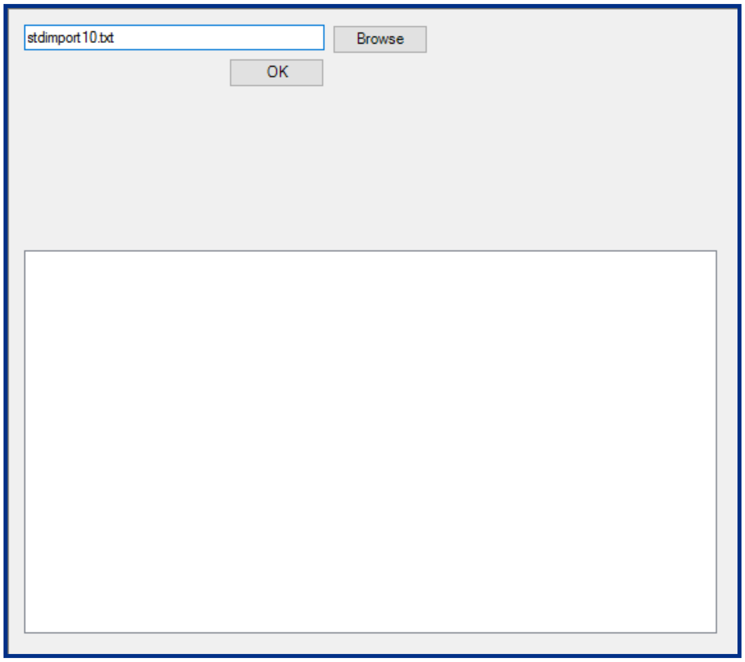
1. On the main menu, click the **Personal icon** > **Request** > **CVV2 Calculator**.
2. Verify the keys entered in HSM Manager are correct.



3. Enter the BIN, card number, and expiration date of an existing card.
4. Click **Calculate**. If the CVV2 on the card and the generated CVV2 match, the keys are correct.

2.7 Import

1. On the main menu, click the **Personal icon** > **Request** > **Import > Standard** (or an alternative).



2. Click **Browse** to select your import file.
3. Click **OK.**

   A list of failed cards shows in the list view with the error per card. Any card not in this list view is successful and in the queue depending on your format settings.

> **Important: If the Override Settings Box is available and you enable it, there are some drop-down menus that you can force the imports to go to. Be aware that if you force cards to print on a printer that is not configured for those settings, you can cause inventory discrepancies.**

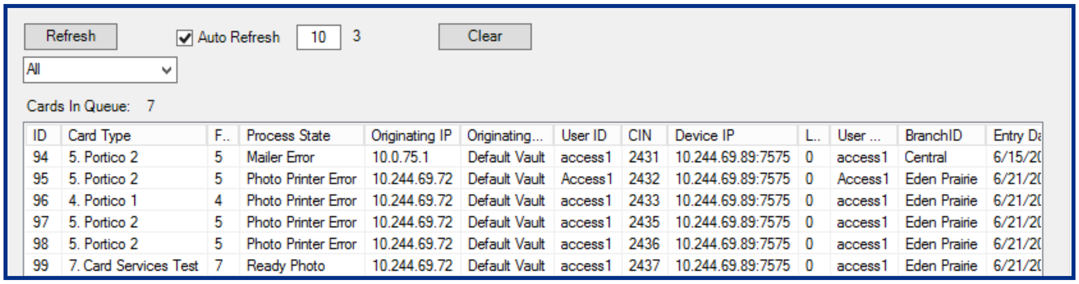
Section 03

Queue

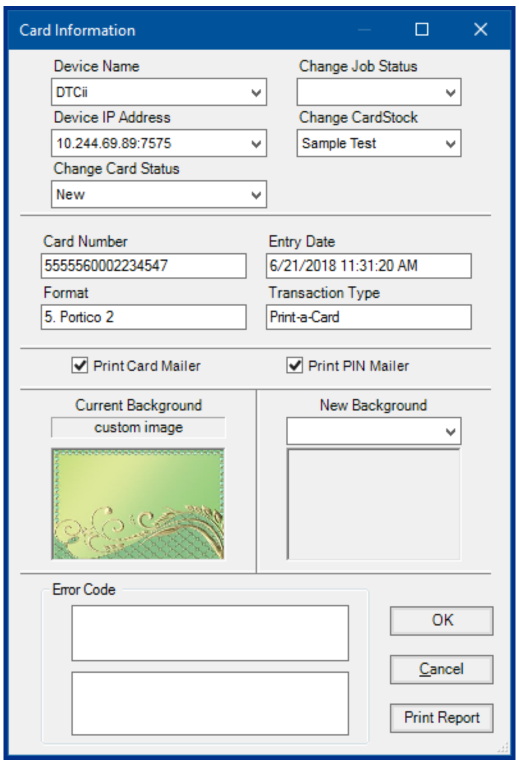
3.1 Card queue

The queue displays all cards that have been ordered and have not yet printed.

On the main menu, click **Queue**.



Double-click an item in the queue to display the Card Information window:



> **Note:** If a Card Information window is open at another workstation or branch, the card cannot be printed, deleted, or changed. In the process state in the queue, this shows as "Trism locked".

- **Change Job Status** allows you to select the card status as ready photo, paused photo, manual photo, or card verified.
- To delete a card from the queue, select it and press **Delete** on your keyboard.

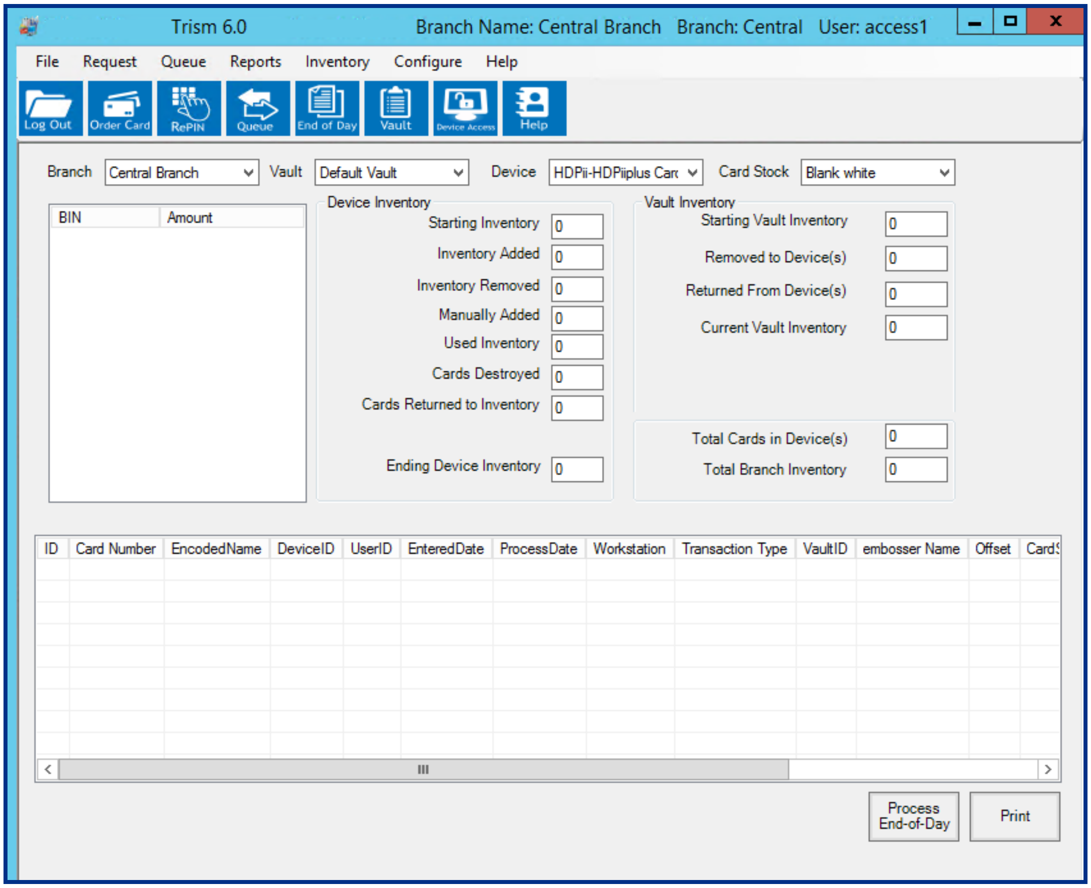
Section 04

Reports

4.1 End Of Day

On the main menu, click the **Personal icon** > **Reports** > **End Of Day**, or click End of Day.

The **End of Day** report displays all cards and inventory changes made that day in selected devices and vaults. The table with the headers **BIN** and **Amount** show the quantity of each card type issued that day.



Field	Description
Device Inventory	
Starting Inventory	Quantity of cards in device at the beginning of the day (only greater than zero if cards are not removed at end of previous day).
Inventory Added	Quantity of cards added to device throughout the day.
Inventory Removed	Total quantity of cards removed from vault device.
Manually Added	Quantity of cards inserted manually into the printer using the exception feed slot.
Used Inventory	Quantity of cards not destroyed or returned to inventory; successfully printed cards issued to customers.
Cards Destroyed	Quantity of cards destroyed in the Spoil Card menu.
Cards Returned to Inventory	Quantity of cards returned in the Spoil Card menu.
Ending Device Inventory	Sum of the above quantities.
Vault Inventory	
Starting Vault Inventory	Quantity of cards in vault since last processed end-of-day.
Removed to Device(s)	Quantity of cards added to devices in Device Access.
Returned from Device(s)	Quantity of cards removed from devices via Device Access and returned to vault.
Current Vault Inventory	Quantity of cards in vault.
Total Cards in Device(s)	Quantity of cards in all devices.
Total Branch Inventory	Sum of cards in devices and vault(s).

If the Ending Device Inventory and/or Total Cards in Device(s) is greater or less than zero, the following window is displayed:

- Click **Yes** to process End-of-Day.
- Click **No** to return to the End-of-Day Report screen.

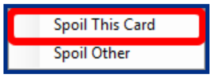
4.1.1 Tips for balancing end of day reports

- Balance the end-of-day report every day. Never start the day with a device inventory greater or less than zero.
- Do not wait until the end of the business day to spoil cards. Spoil them as soon as they are incorrectly printed. Otherwise, it is easy to lose track of misprinted cards and causes difficulty balancing the end of day report.
- Use the Device Access function to account for added or removed cards even if the device is unlocked manually. Not using Device Access is a guaranteed way to end the day with a negative device inventory.
- The queue should be empty at the end of day. All cards in the queue should either be printed and verified or deleted.

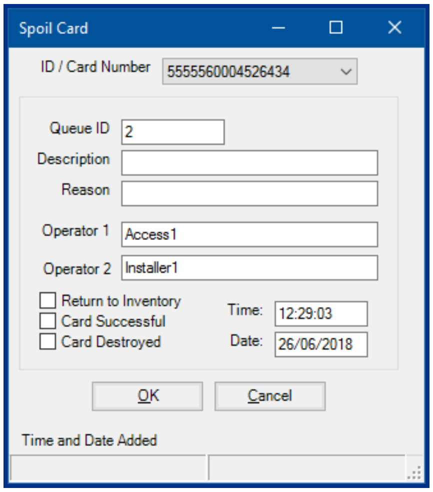
4.1.2 Spoil cards

A misprinted card that cannot be issued is considered "spoiled." A spoiled card is highlighted in red.

1. Right-click a card in the **End of Day** report:



2. Select **Spoil This Card** to display the following window:



3. Enter a description of the spoiled card and the reason for spoilage. Select from the following options:

Field	Description
Return to Inventory	The card was ejected clean/unencoded and can be used again. Will add 1 back into Vault Inventory.
Card Successful	The card did print or a card was accidentally printed. Subtracts 1 from Vault Inventory.
Card Destroyed	The card was damaged during printing or was destroyed after printing. Subtracts 1 from Vault Inventory.

4. Click **OK**.

4.1.3 Spoil other

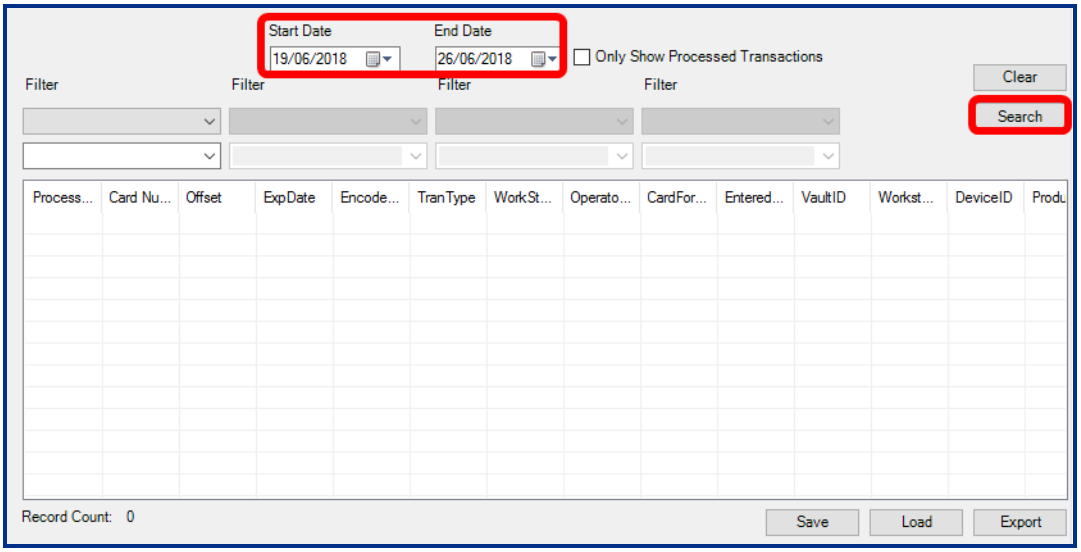
If inventory needs adjusting without the need to spoil a printed card, this can be achieved through selecting **Spoil Other**. Right-click anywhere in the field where printed cards are displayed and select **Spoil Other.** The same process as a regular spoil applies.

- To add a card back to the Vault Inventory, select **Return to Inventory**.
- To subtract a card from the Vault Inventory, select **Card Destroyed**.

4.2 Management

Reports with user-specified information can be created in the **Management** tab.

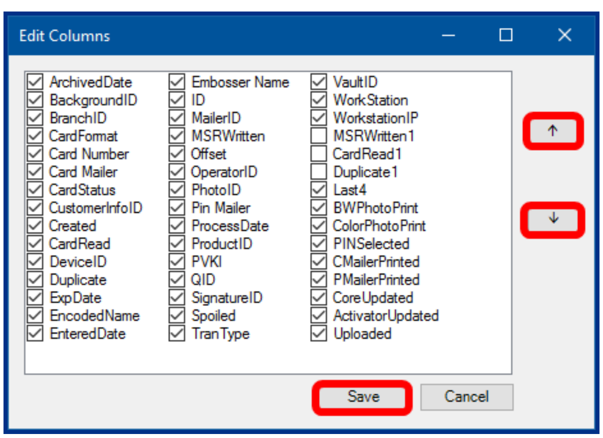
1. On the main menu, click the **Personal icon** > **Reports** > **Management**.
2. Select the **Start Date** and **End Date** to specify a range of cards to display. The **Start Date** should be set one day prior to the date of card verification.



3. Click **Search** to populate the list of cards.

4.2.1 Create a customized report

1. Select which columns are printed by right-clicking anywhere in the card information field and then selecting **Add/Remove Columns**.
2. Select or clear the boxes to display columns. To change the column order, select a column name and click the up or down arrows.



3. Click **Save** to apply your changes, then click **Search** to apply them.
   If this does not change the default column view, select a date range in which transactions were processed.

4.2.2 Filter columns

1. Select a column field from the first **Filter** drop-down menu.
2. Enter the filter criterion in the field below (only one criterion per filter). Filters must match the intended field name exactly.

   > **Note:** Only one filter field is initially enabled. The following filters are enabled once preceding filters are designated.

3. Click **Search** to apply the specified filters.

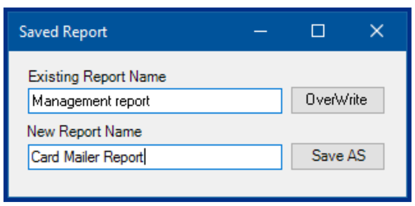
4.2.3 View card details

Right-click a card and select **Details**.

4.2.4 Save a customized report

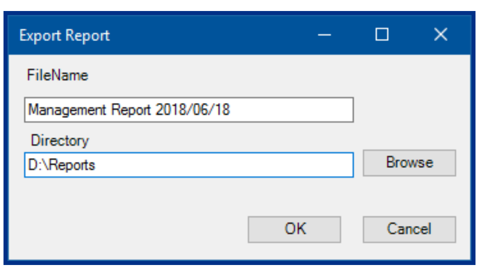
Click **Save**.

- To save over an existing saved report, click **OverWrite**.
- To save a new report, click **Save AS**.



4.2.5 Export a report to Excel

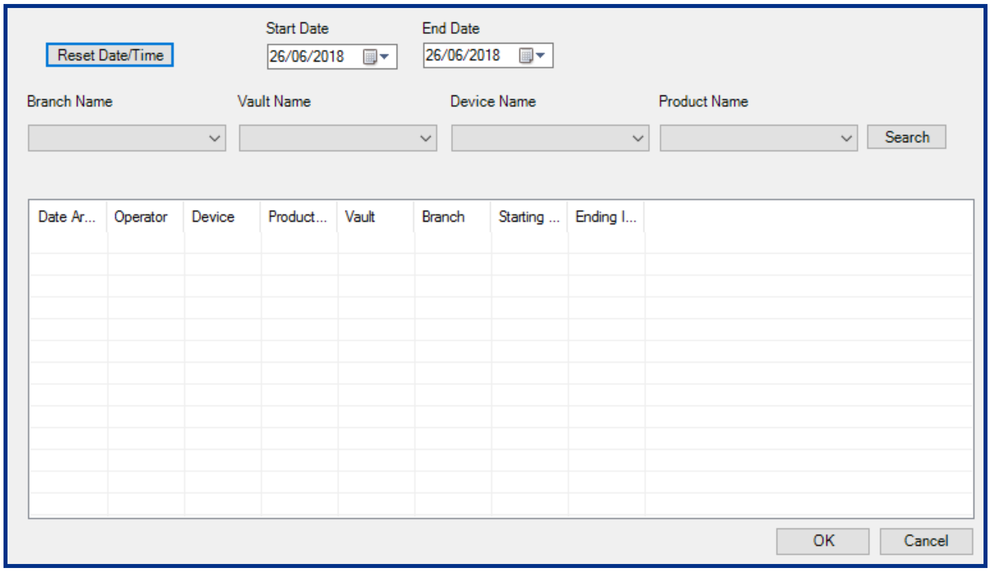
1. Click **Export**.
2. Enter a filename in the **FileName** field, then click **Browse** to select a location to save the file.
3. Click **OK**.



4.3 Historical Card Balancing

Reports summarizing cards printed per branch, device, card stock, and/or operator can be printed.

1. On the main menu, click **Reports** > **Historical Card Balancing**.



2. Select a date range, branch, vault, device, and/or product in the drop-down menus to narrow the search.
3. Click **Search** to generate the historical report.

Reset Date/Time changes the start and end dates to the current date.

4.4 Device Access

On the main menu, click the **Personal icon** > **Reports** > **Device Access** to display a list of all device access activity for a specified printer/embosser within a specified date range.

4.5 Spoiled Card

On the main menu, click the **Personal icon** > **Reports** > **Spoiled Card** to create a report of all spoiled cards for a specified branch within a specified date range.

4.6 Branch Activity

On the main menu, click the **Personal icon** > **Reports** > **Branch Activity** to create a report of all cards printed at the branch in which the workstation creating the report is located.

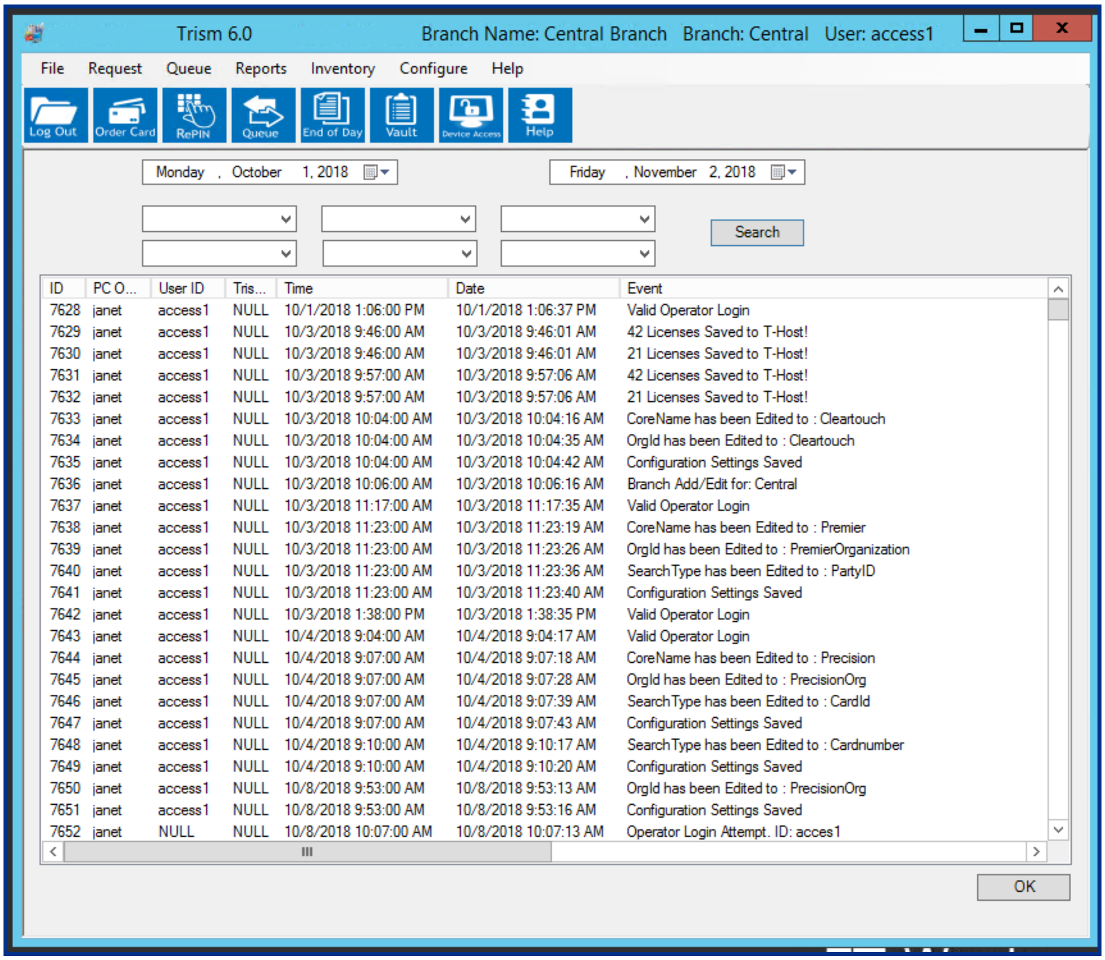
4.7 Device Error

On the main menu, click the **Personal icon** > **Reports** > **Device Error** to create a report of all device errors for a specified printer within a specified date range.

4.8 Non-Financial

Displays TRISM activity per PC Operator, User ID, TRISM ID, Event, Result, IP Address, Branch, or Computer Name.

1. On the main menu, click the **Personal icon** > **Reports** > **Non-Financial**.
2. Select a field in the top row of drop-down menus, then select or manually enter search criteria in the drop-down menu below it.
3. Click **Search** to display results.



4.9 Background

On the main menu, click the **Personal icon** > **Reports** > **Background** to display a list of all background images printed within a specified date range.

4.10 Remove Cardholder Data

Customers may wish to have their data removed from the system, especially in cases of General Data Protection Regulation (GDPR). To remove data from the system, use the Customer Information Section from the database.

To enable this feature, you must access the permissions and select the **Customer Removal** check box. Once this feature is enabled, you can access the **Customer Removal** screen to remove all records or specific records from the database.

1. Select the **Personal icon** > **Reports** > **Remove Cardholder Data**.
2. On the **Customer Removal** screen you can search all records or a specific record.
   - To search all records, leave the **Name** field blank and click **Search.**
   - To search for a specific name, enter the first, middle, and last name in the **Name** field and click **Search**.

   Any information that matches the search criteria is displayed.
3. Select the records you wish to remove and click **Delete**. The user information is removed, and the screen is refreshed with a new list of applicable search criteria.

> **Important: The record of the transaction remains in the database but all information pertaining to the customer is removed. This includes photo information.**

Section **05**

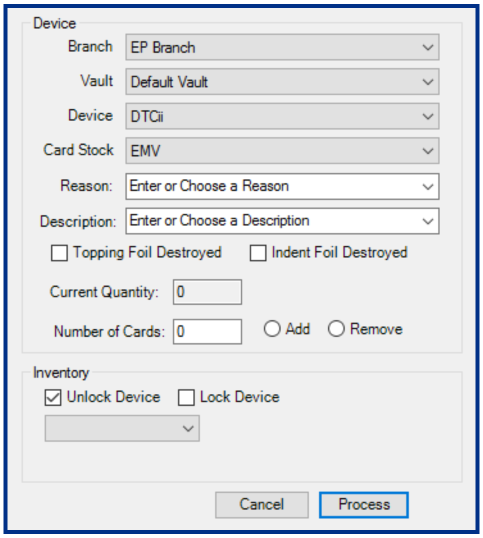
Inventory

5.1 Device Access

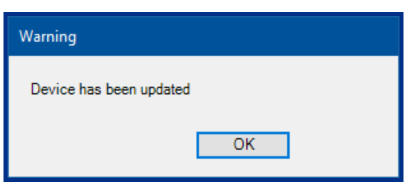
5.1.1 Add/remove cards and change ribbon/foil

Each time a printer or embosser is opened, it must be accounted for in the Device Inventory.

1. On the main menu, click the **Personal icon** > **Inventory** > **Device Access**, or click Device Access.



2. The **Branch**, **Vault**, and **Device** defaults to whatever values were assigned to the branch. Select other values if necessary.
3. If adding or removing cards, select **Card Stock**.
4. If opening an embosser to change topping and/or indent foil, check the corresponding boxes.
5. Select **Add** or **Remove**. Selecting **Remove** automatically generates a reason, description, and number of cards.
6. Enter a **Reason** for opening and a **Description** of the actions performed or choose a reason and description from the drop-down menus.
7. Enter the **Number of Cards** to add or remove, if any.
8. Select a time delay for unlocking the device. Longer delays should be used if the device is not near the workstation.
9. Click **Process**.

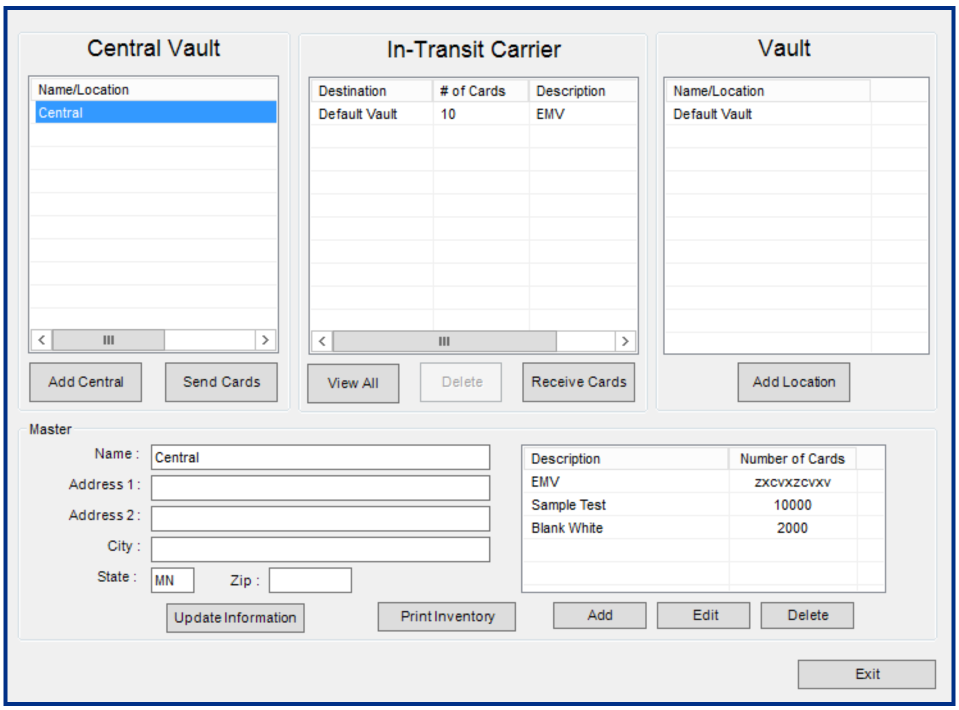


5.2 Vault Inventory

Vault Inventory shows the number of cards in each vault (central or branch). It also allows you to track shipments of cards between the central vault and a branch vault. A central vault is not required, but at least one branch vault is required. That vault can be shared by multiple branches if necessary (Central Issuance).

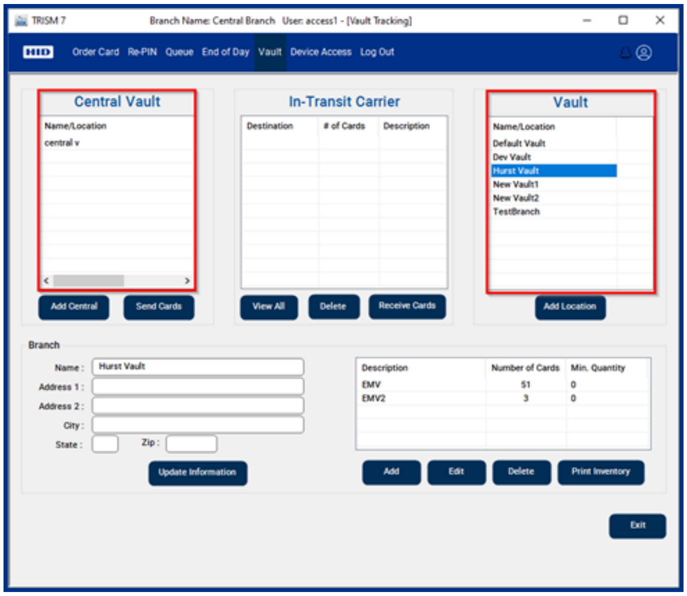
5.2.1 Add a vault

1. On the main menu, click the **Personal icon** > **Inventory** > **Vault Access**, or click Vault.
2. Click **Add Central** in the Central Vault display or **Add Location** in the Vault display.
3. Enter the required name and address fields (optional).
4. Click **OK**.

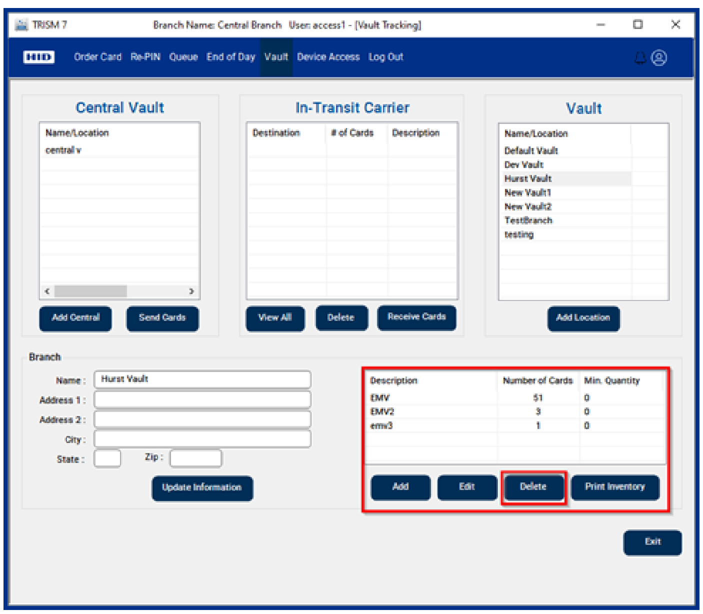


5.2.2 Delete a vault

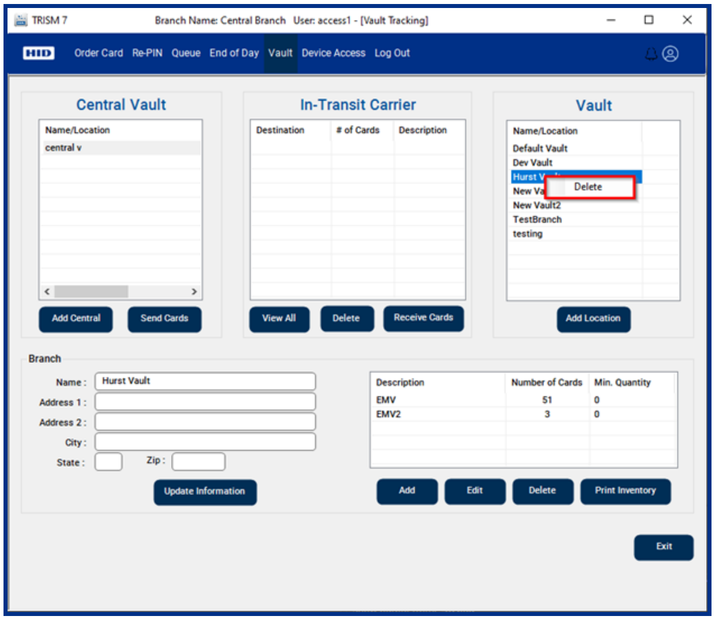
1. Detach the vault to be deleted from any branches and printers.
2. From the quick launch toolbar, select **Vault** and log in with Dual Control when prompted.
3. Select the central Vault/Vault to be deleted.



4. Select each cardstock entry and click Delete.



5. Right-click on the vault to be deleted and click **Delete**.

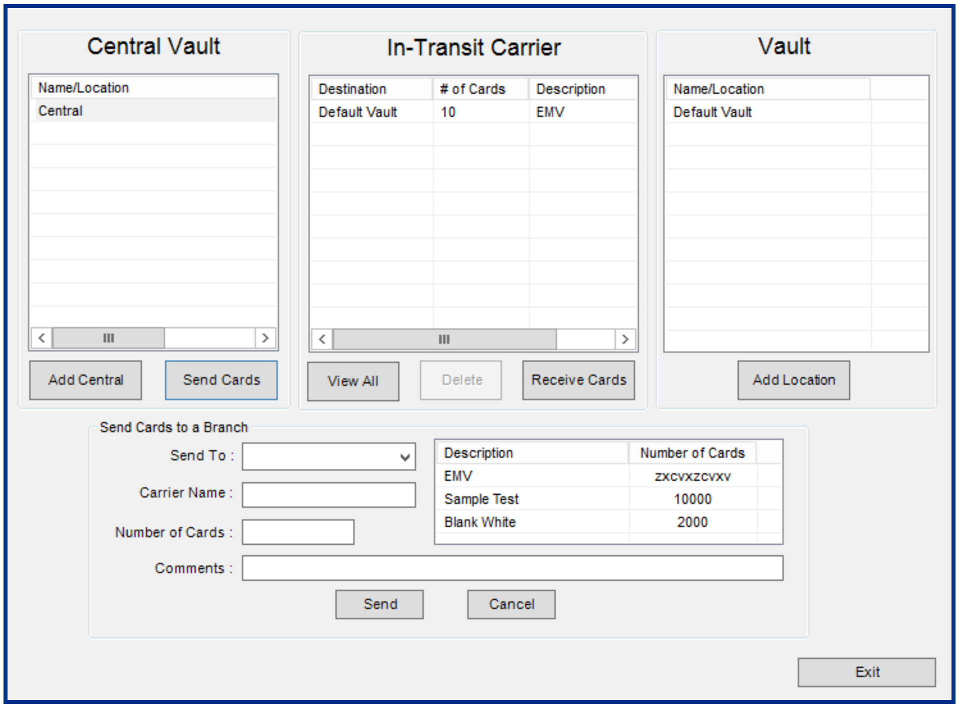


The vault is removed from the list.

5.2.3 Transfer cards - send cards

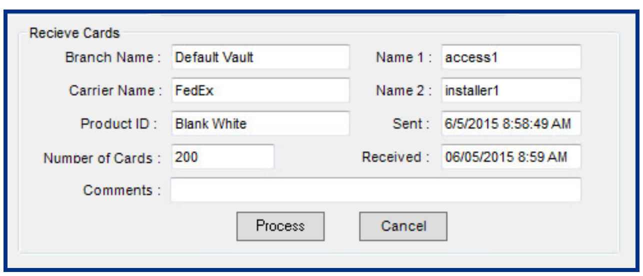
1. Select a central vault, then click **Send Cards**.
2. Select the recipient branch's vault from the **Send To** drop-down menu.
3. Enter the **Carrier Name**, **Number of Cards** to send, and any additional comments.
4. Select the type of cards stock to send.
5. Click **Send**.

6. The shipment order is displayed under the **In-Transit Carrier** menu.



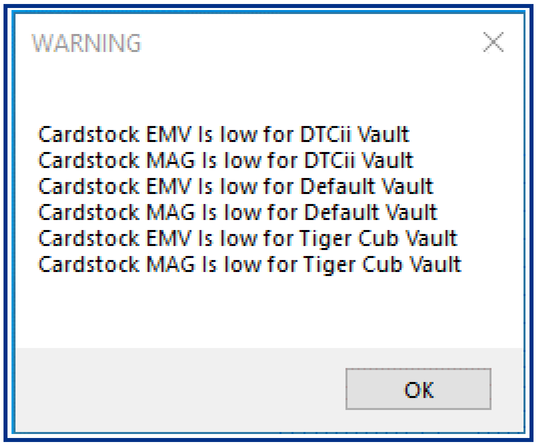
5.2.4 Transfer cards - receive cards

1. Select the received order under the **In-Transit Carrier** menu.
2. Click **Receive Cards**, then **Process**.
   The order is removed from the In-Transit Carrier menu and the cards are added to the vault inventory.



5.2.5 Low inventory alerts

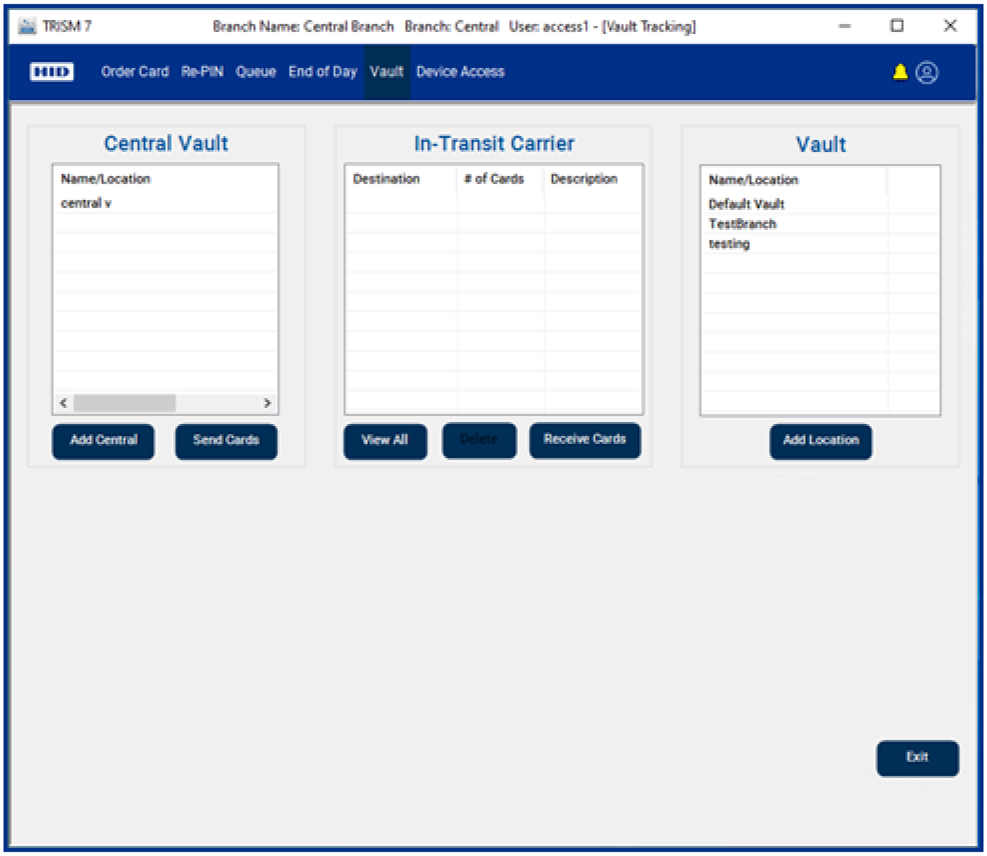
If TRISM is used for tracking inventory, the TRISM client can be set up for low inventory warnings. These warnings are displayed upon login. Low inventory alerts notify you when the branch vault is running low on card stock. You can set the inventory levels for each individual vault location. Then, in the User Template, you can enable the alerts. When the low inventory levels are set up and enabled, the following warning is displayed:



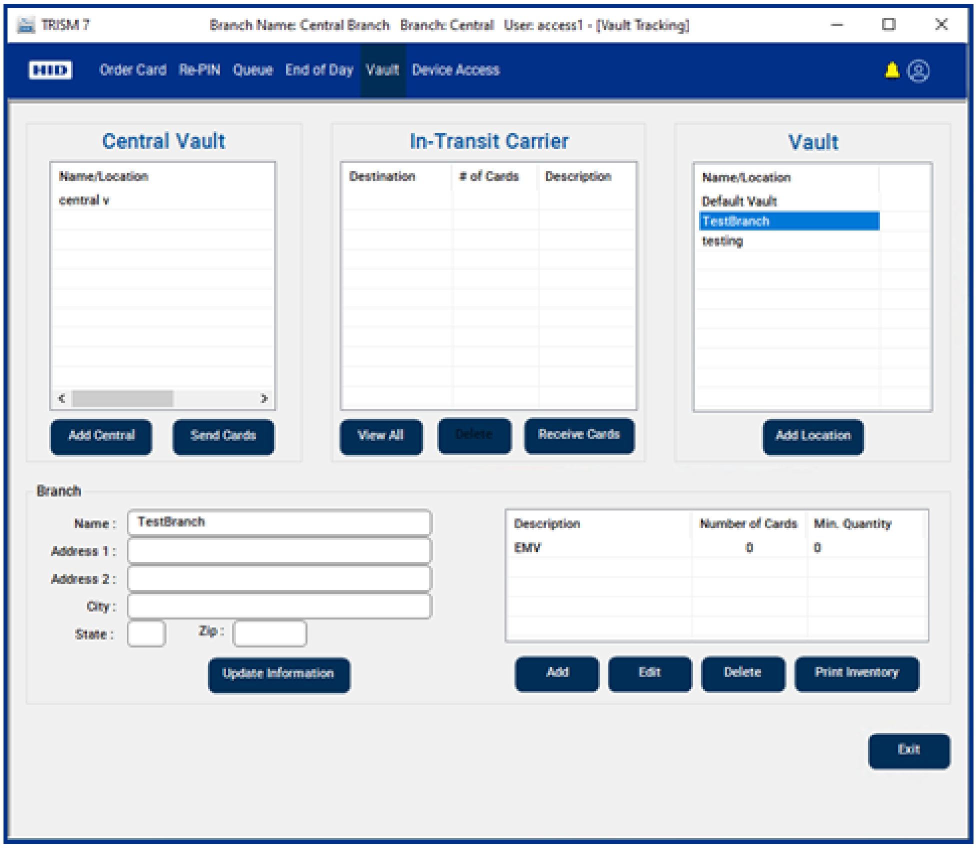
> **Note:** To set up the low inventory alerts you must have a Dual Control user ready with the same permissions.

1. Log in to a TRISM template with the ability to access and edit vaults.
2. On the main menu, select Vault and log in with a Dual Control user when prompted.

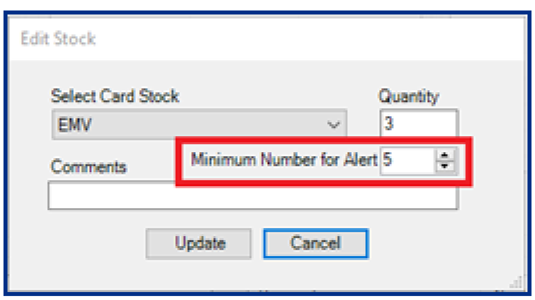
3. The Vault information is displayed. Select a Vault location.



4. The Branch information is displayed and the current minimum number of cards remaining before the alert is enabled is displayed in the **Min. Quantity** column.



5. To edit the minimum number of cards remaining before the alert, double-click the card stock name or select the card stock name and click **Edit**.



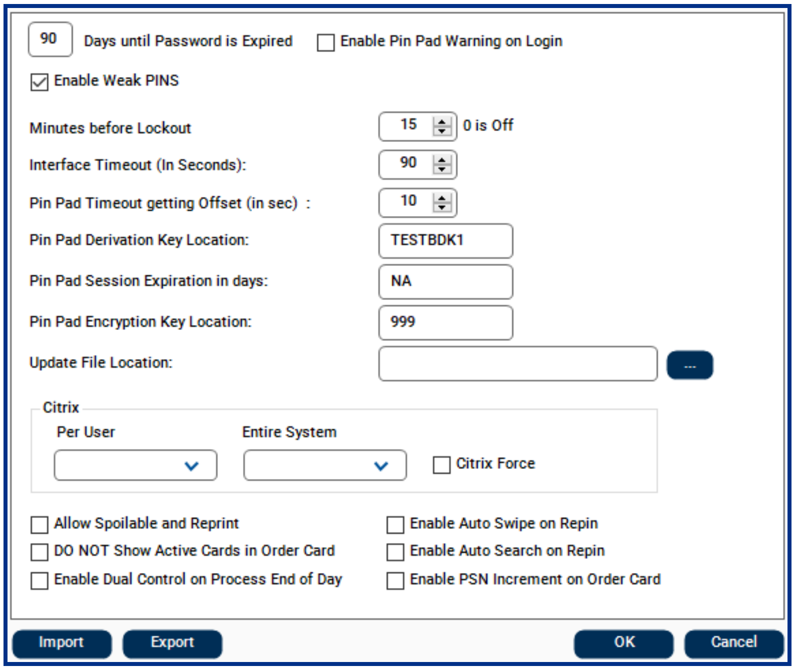
6. The Edit Stock window is displayed. Enter a number or use the up and down arrows to increase or decrease the **Minimum Number for Alert** and click **Update**.
7. Repeat these steps for each vault and card stock.

Section **06**

Configure

6.1 General

On the main menu, click the **Personal icon** > **Configure.** On the side menu, click **General**.

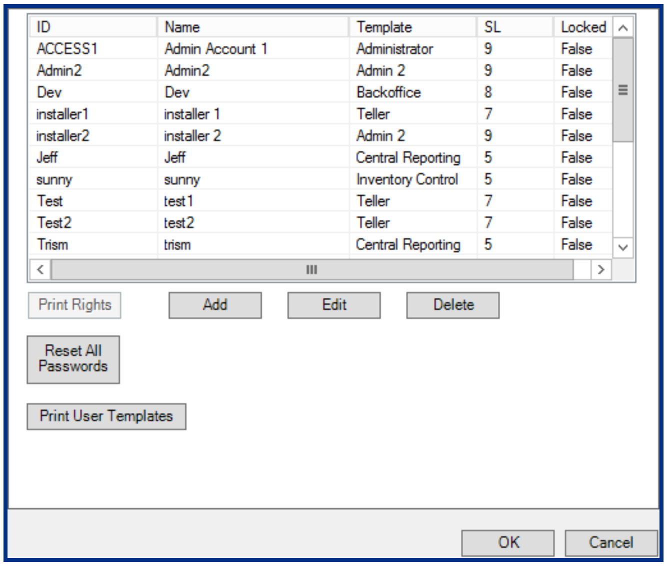


Field	Description
Days until Password is Expired	Applies only to non-Active Directory users. User passwords are valid for this number of days. Users are prompted to select a new password upon expiration.
Enable Pin pad Warning on Login	Display warning message that no PIN pad is plugged in to the computer upon TRISM login.
Enable Weak PINS	If checked, weak PINs (1111, 1234, 4321, and so on.) are allowed.
Minutes before Lockout	After the specified number of minutes, the user must re-enter login credentials to continue using TRISM. Must be same user that is currently active, otherwise TRISM must be restarted to log in as a different user.
Pin Pad Derivation Key Location	Numerical location of PIN Pad Derivation Key in HSM Manager.
Pin Pad Timeout getting Offset	After PIN is entered: if offset is not generated after the specified number of seconds, PIN pad times out.
Update File Location	Where TRISM update files are downloaded.
Citrix	**Per User**: Select port if assigned per user. **Entire System**: Select port if assigned for entire system.
Allow Spoilable and Reprint	When the card status is changed to Ready in the Queue, a message box asks if a card has already been printed from the specified request. If yes, another transaction is created that may be spoiled.
DO NOT Show Active Cards In Order Card	If using an interface to find customer information, only the customer's inactive or expired cards will populate in the search results.

6.2 Users

The following user configuration is not used when **Active Directory** is enabled, except for the administrative users **access1**, **installer1**, and **installer2**.

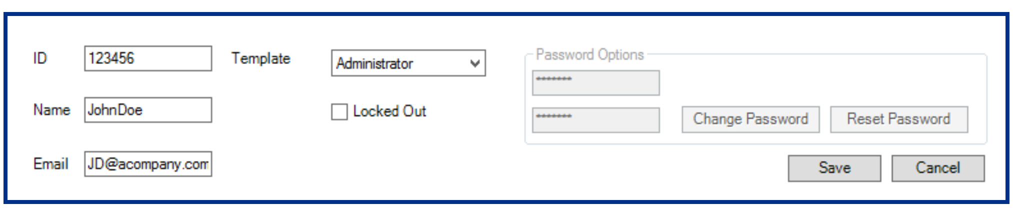
On the main menu, click the **Personal icon** > **Configure.** On the side menu, click **Users**.



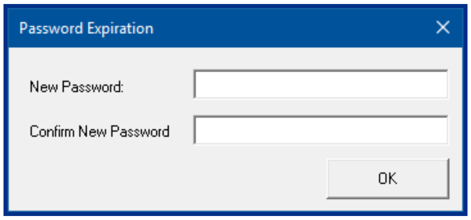
Field	Descriptions
Print Rights	Print a list of all the selected user's template permissions.
Print User Template	Print a list of all TRISM users and their corresponding templates.
Reset All Passwords	Change password of all users to **1234567**. After logging in with this password, users are prompted to select a new password.

6.2.1 Add users (without active directory)

1. Click **Add**, and enter the user ID, Name, and select a template.
2. Click **Save**.



New user password selection



When you log in as a new user, you must use the default password **1234567**. When you click **Login**, a window opens and prompts you to change your password.

Enter the new password and click **OK**. You must then enter your new password in the login screen. There are no requirements on passwords, however, the password strength meter indicates the strength of the password. Point values are assigned to the characters and the meter updates as characters are entered or deleted. Point values are noncumulative for each case. Point values are:

- Capital letters: 2 points
- Lowercase letters: 2 points
- Numbers: 1 point
- Special characters (!@#$%^&*): 3 points
- Length of at least 12 characters: 5 points
- Length greater than 15 characters (not cumulative with length at least 12 characters): 10 points

As point values are accumulated, the strength of the password is measured in colors on the strength meter. Point values are scored as:

- Up to 5 points: Very weak (red)
- Between 6 and 10 points: Weak (orange)
- Between 10 and 15 points: Good (yellow)
- Greater than 15 points: Very strong (green)

Alternatively, users can be entered using the Active Directory function.

6.2.2 Edit users (without active directory)

Select a user and click **Edit**. Make the desired changes and click **Save**.

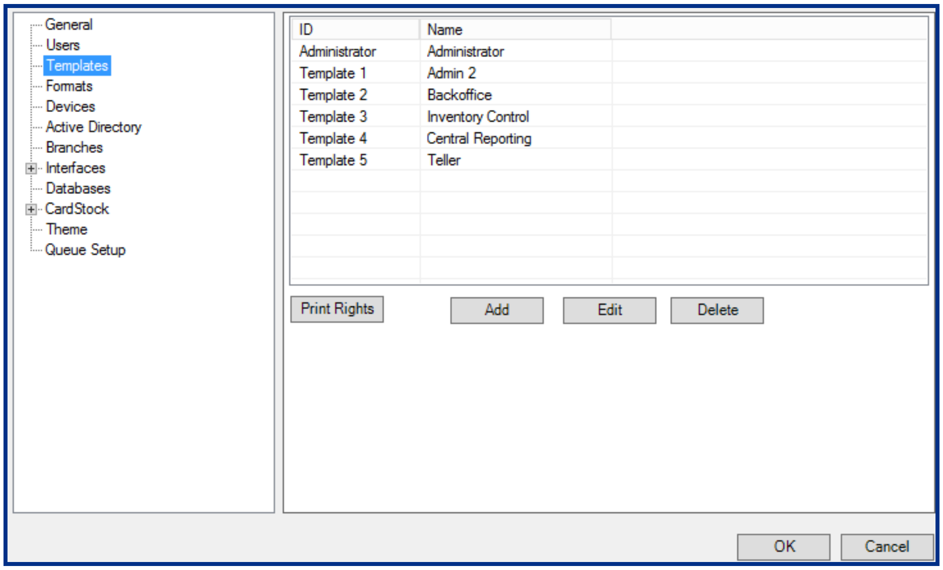
6.2.3 Delete users (without active directory)

Select a user and click **Delete**.

6.3 Templates

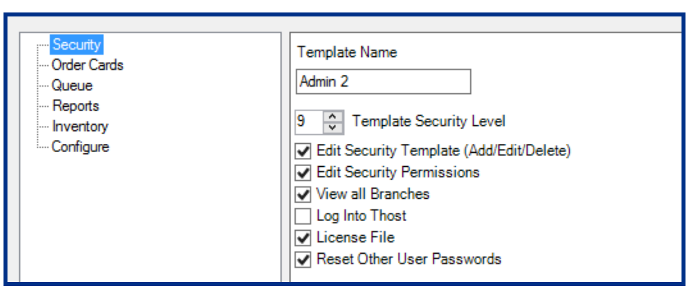
A template can be used to automatically assign a user a specific set of permissions. See section **A.4 Permission descriptions** for permission descriptions. The administrator template cannot be edited or deleted.

On the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Templates**.



Field	Description
Print Rights	Print a list of all user permissions associated with the selected template.
Add	Add new templates.
Edit	Enable or disable permissions of the selected template.
Delete	Delete a User Template from the list. Only templates added by the financial institution can be deleted. **Administrator**, **Admin 2**, **Backoffice**, **Inventory Control**, **Central Reporting**, and **Teller** cannot be deleted.

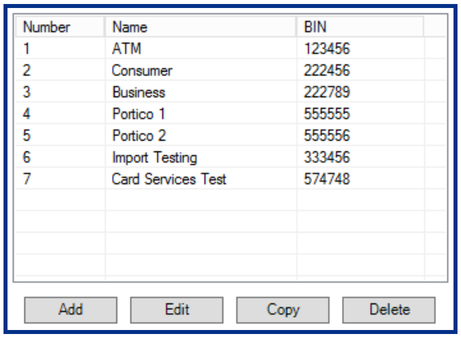
Each of the options in this menu opens a list of permissions that can be enabled and disabled by clicking their respective check boxes.



6.4 Formats

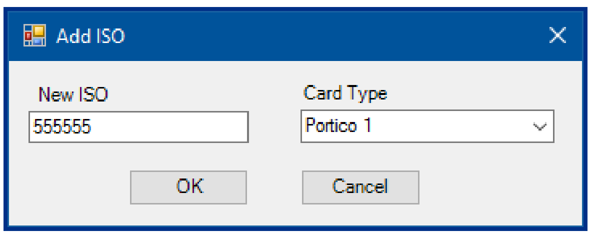
Card types (for example, Mastercard, Visa, Visa EMV, and so on.) are added in the **Formats** menu. Card and mailer formats can also be edited in the **Formats** menu to customize placement of text and pictures.

On the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Formats**.



To add a card type:

1. Click **Add**.
2. Enter the card's **ISO** or **BIN** number, then select or manually enter the **Card Type**.
3. Click **OK**.

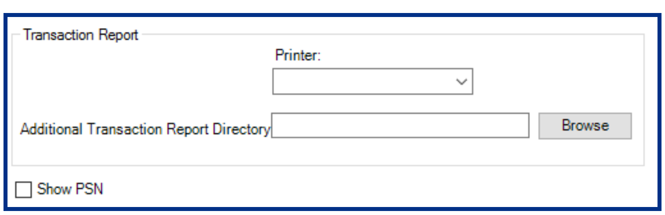


6.4.1 General Settings

To display the general settings:

1. On the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Formats**.
2. Select a card type in the list and click **Edit**.
3. On the side menu, click **General Settings**.

BINs cannot be added to branches until their formats are completed.



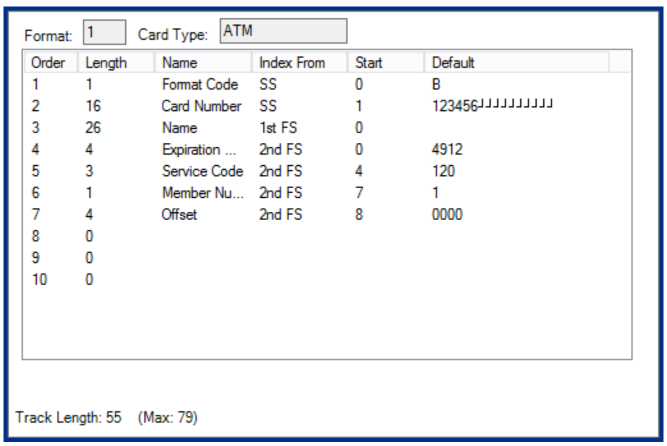
Field	Description
Print Report for Every Queued Transaction	All transactions sent to the queue print a hard-copy report to the printer selected in the drop-down menu.
Additional Transaction Report Directory	All items in the selected folder are printed in addition to transaction reports.
Show PSN	Shows the PSN control on the Order Card screen. Some financial institutions will need to manually update the PSN. Other financial institutions will wish to hide this control.

6.4.2 Encode Settings

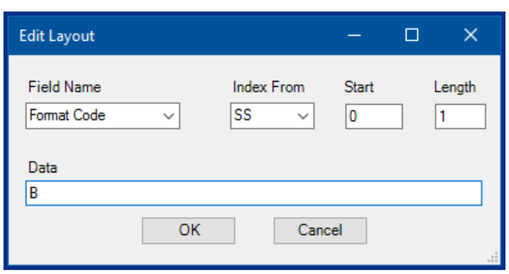
The **Encode Settings** determine the information and placement of information written to the cards' magnetic stripe. To display the encode settings:

1. On the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Formats**.
2. Select a card type in the list and click **Edit**.
3. On the side menu, click **Encode Settings**.

Track 1/Track 2 Layout

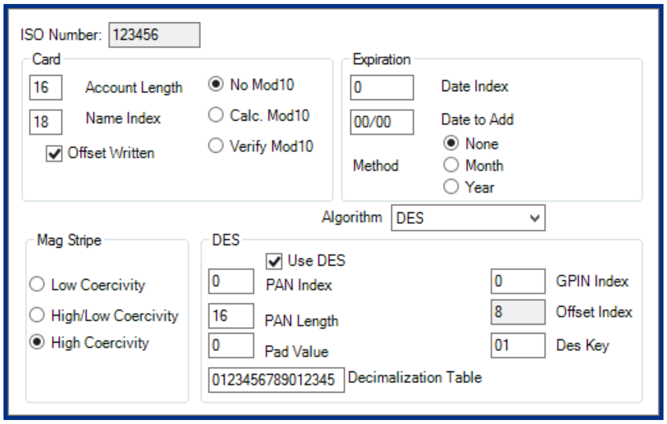


1. To edit the settings, double-click the field to be changed to display the following window:



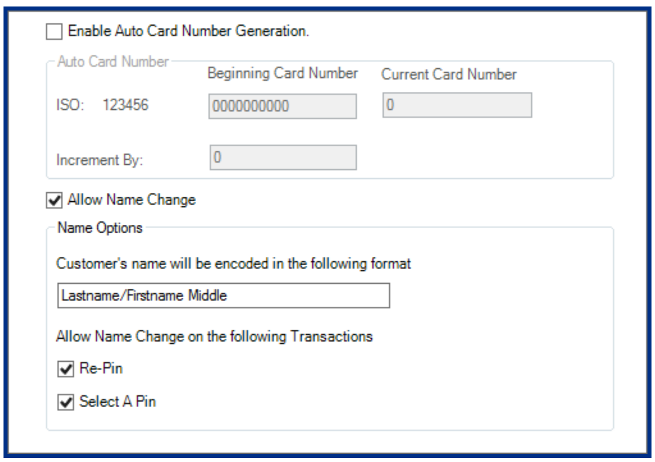
2. Click **OK** when editing is completed.

Track 1/Track 2 Parameters



Auto Card Number

Card numbers can be generated automatically by TRISM in the **Auto Card Number** menu. Check the **Enable Auto Card Number Generation** box to edit card number settings.



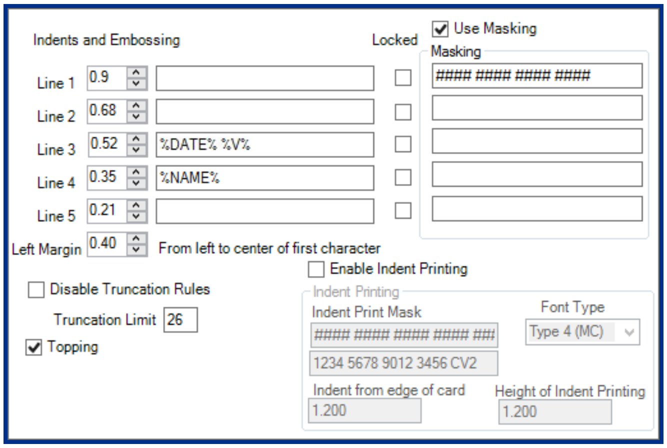
Field	Description
Beginning Card Number	First card number used.
Current Card Number	Last card number printed.
Increment By	Determines by what increment card numbers increase.
Allow Name Change on the following Transactions	Allows modification to an existing customer’s name.

6.4.3 Emboss Settings

To display the emboss settings:

1. On the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Formats.**
2. Select a card type in the list and click **Edit.**

3. On the side menu, click **Emboss Settings**.

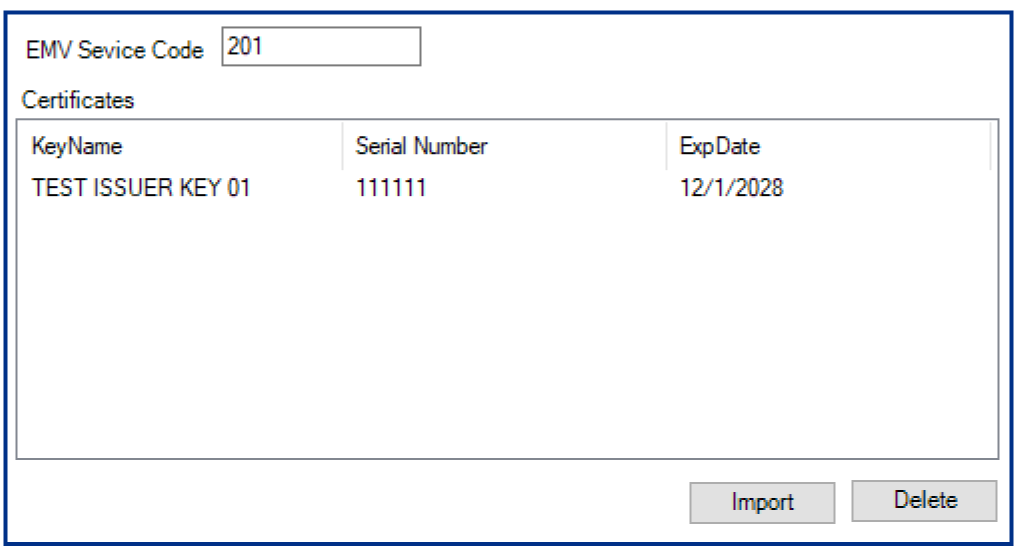


Field	Description
Indents and Embossing	Enter the size of the indentation applied to text on the card.
Use Masking	Check this box to hide certain lines of text from displaying on the Order Card window when cards are being created.
Disable Truncation Rules	Customer names are not shortened automatically.
Topping	Check this box if topping foil is used on embossed card text.

6.4.4 EMV

To display the EMV service code, which indicates that the card is an EMV chip card.

1. On the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Formats**.
2. Select a card type in the list and click **Edit**.
3. On the side menu, click **EMV**.



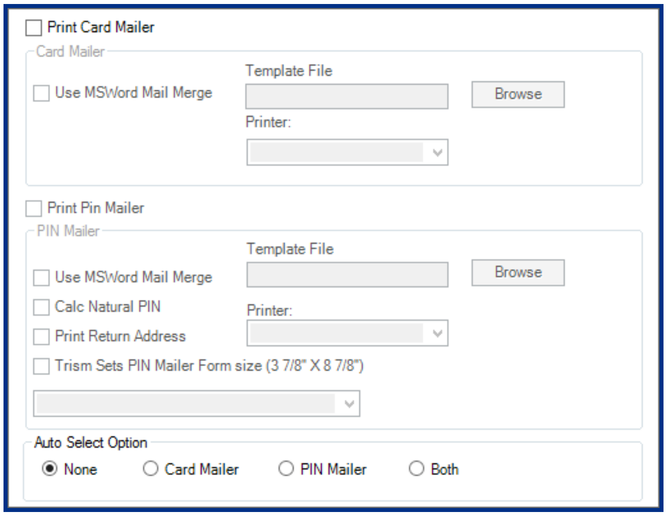
For information on importing issuer certificates used for dual interface EMV chips, see section 7.2 Import the Issuer Certificate File into the TRISM Client in the *TRISM HSM XT Administrators Manual* (PLT-04227).

6.4.5 Mailers

> **Note:** This option is only available if you are licensed for mailers.

To display the Mailers settings:

1. On the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Formats**.
2. Select a card type in the list and click **Edit**.
3. On the side menu, click **Mailers**.



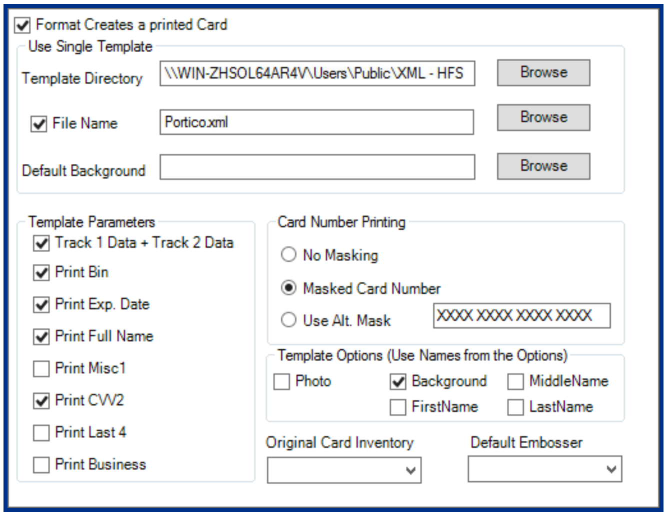
Field	Description
Print Card Mailer	Enables printing of mailers upon card print.
Use MSWord Mail Merge	Use mailer templates from Microsoft Word documents.
Print PIN Mailer	Enables printing of mailers upon card print.
Use MSWord Mail Merge	Use mailer templates from Microsoft Word documents.
Calc Natural PIN	Automatically generate a PIN for which the offset is 0000. When this is not enabled, the offset is determined based on a randomly generated PIN.
Print Return Address	Include the branch's address on the PIN mailer.
Auto Select Option	Specifies a default mailer option, so the teller does not have to make a manual selection each time.

6.4.6 Photo Settings

Configure **.xml** files, card number layout, photo IDs, and custom backgrounds. To display the photo settings:

1. On the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Formats**.
2. Select a card type in the list and click **Edit**.
3. On the side menu, click **Photo Settings**.

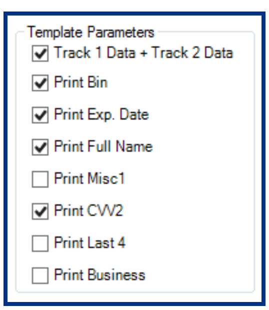
General



Field	Description
Use Single Template	
Template Directory	Sets the image gallery location. Click **Browse**. The file location should be accessible to every user. It is recommended the image gallery is saved in a folder with a name matching the BIN, within the specified card type folder. For example: **\\Server Name\Images\Card Type\BIN**
Default Background	Select a background image to automatically populate the Order Card screen.
Card Number Printing	
No Masking	Select for 18-digit cards to disable spacing between numbers.
Masked Card Number	Separate a 16-digit card number into 4 blocks of 4 digits.
Use Alt. Mask	Enter a string of "#" signs consistent with the desired spacing of card digits.

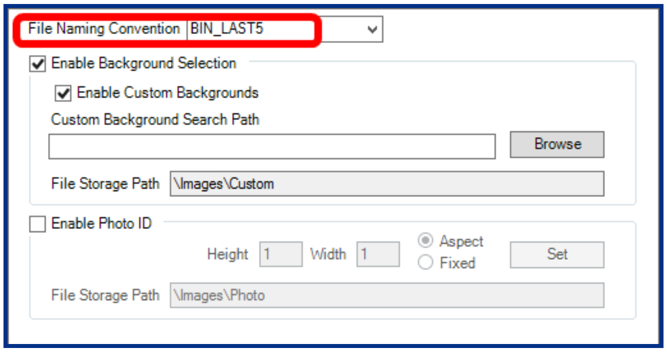
Template Parameters and Template Options

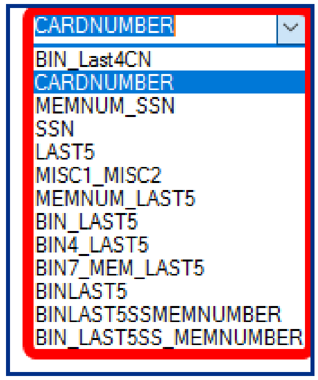
Check the fields that the card format **.xml** file contains.



Advanced

From the **File Naming Convention** drop-down menu, select which cardholder information indicator is used to name the image files.





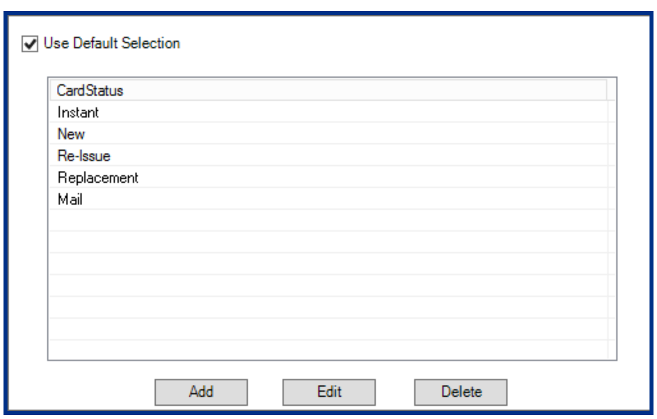
Field	Description
Enable Background Selection	Enable the gallery card selection drop-down menu in the Order Card screen. **Enable Custom Backgrounds:** Show the Personalize button in the Order Card screen. **Custom Background Search Path:** Folder in which custom backgrounds will be saved.
Enable Photo ID	Show **Take Photo** button in the Order Card screen.

6.4.7 Card Status

The card status for each format is chosen in the **Order Card Job Information** panel. Use the default selection.

To display the card status settings:

1. On the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Formats**.
2. Select a card type in the list and click **Edit**.
3. On the side menu, click **Card Status**.



Card Status	Definition
Instant	Activates card and updates offset/exp.date when end user has already added a card record and it is being pulled back into TRISM.
New	Adds skeletal record, activates card, and updates offset/exp.date.
Re-Issue	Updates offset/exp.date.
Replacement	Makes no changes and does not communicate any new data (for example, just prints a card).
Mail	Used in conjunction with the default statuses (for example, Instant Mail, New Mail, Re-Issue, and Replacement). Adds skeletal card record, updates offset/exp.date, and does not activate card.

6.4.8 Card Class

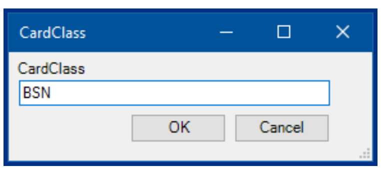
When there is more than one card class assigned to a BIN, the card class for each format is chosen in the **Order Card Job Information** panel.

To display the card class settings:

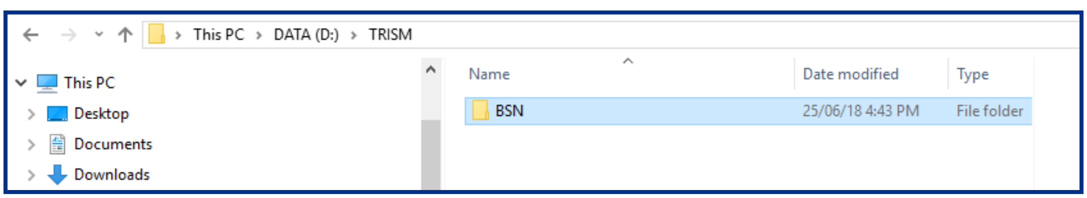
1. On the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Formats**.
2. Select a card type in the list and click **Edit.**
3. On the side menu, click **Card Class**.

Adding a Card Class to a BIN:

1. Click **Add** and enter the card class name. Click **OK**.



2. In Windows Explorer, navigate to the BIN template directory. Create a folder with a name that exactly matches the card class name.

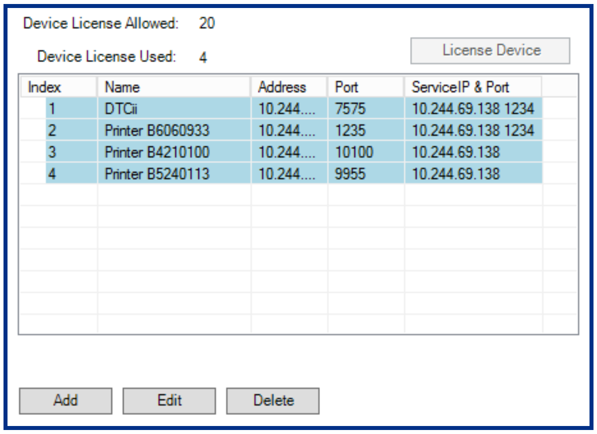


3. Add the desired image and xml file to the card class folder. If using different xml files for each image, add all necessary xml files.
4. If another BIN is using the same card class, copy the card class folder and paste it in the other BIN folder. It is important that each card class folder is updated when the contents of one is modified.

6.5 Devices

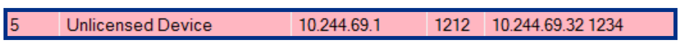
The **Devices** tab displays a list of all printers and embossers configured with TRISM.

On the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Devices**.

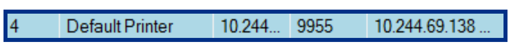


Each device must be licensed. For instructions on adding a device license, see section **8.7 License**.

An unlicensed device is highlighted in red. Select the device from the Devices list and click **License Device**.

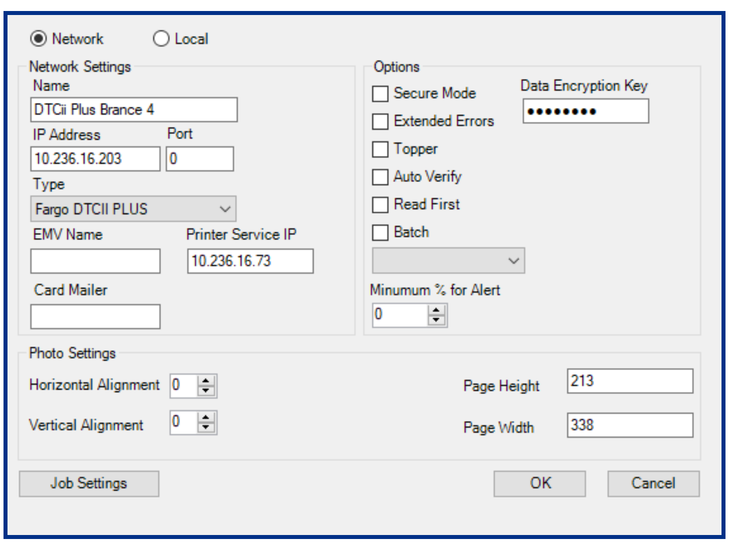


A licensed device is highlighted in blue.

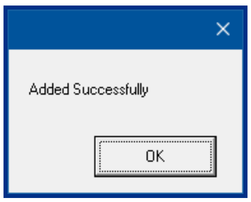


6.5.1 Add a printer or embosser

1. Install the printer according to the manufacturer's instructions.
2. In the TRISM 7 **Devices** window, click **Add**.
3. If the printer is accessed via a network or wireless connection, select **Network**.



4. Enter the printer **Name**, **IP Address**, a **Port** unique to the printer, **Type** (photo printer, embosser), and UNC path of the **Card Mailer** printer (if applicable).
5. Set the **Horizontal** and **Vertical Alignment** fields to **6** (HDPii Plus printers only).
6. Ensure the **Page Height** is **213** and the **Page Width** is **338**.
7. If an embosser is being used, select the desired options in the **Options** area:
   - **Secure Mode**: Enter embosser's data encryption key to encrypt information sent to embosser.
   - **Extended Errors**: View a detailed log of any embosser errors.
   - **Topper**: Check if a foil topping is imprinted on card numbers and names.
   - **Auto Verify**: After a card is printed, it is automatically verified that it has printed correctly. This is recommended when printing large quantities of cards.
   - **Read First**: Not used.
   - **Batch:** Not used.
8. When all required information has been added, click **OK**.

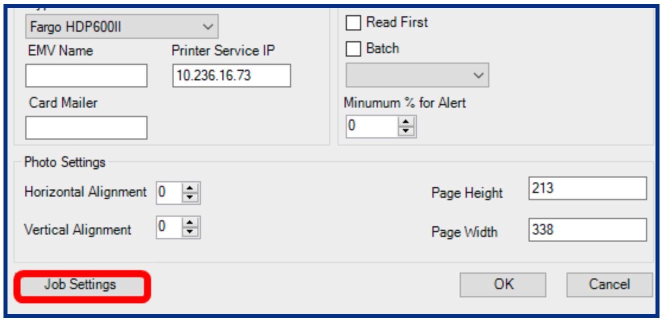


9. Restart Card Printer Service after adding, deleting, or changing a device.

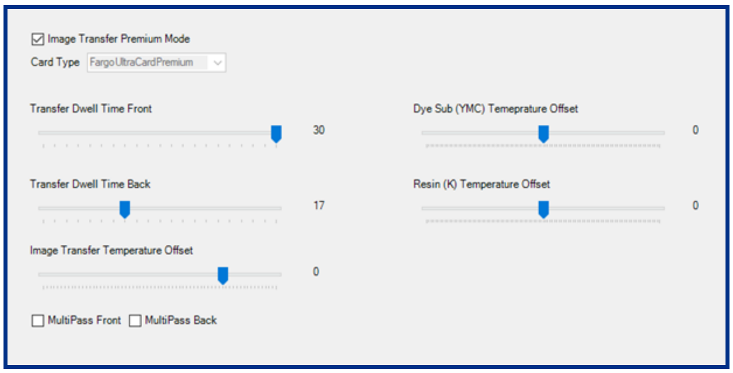
Job Settings for HDP600ii Printer

Additional job settings can be configured for the HDP600ii printer.

1. In the TRISM 7 **Devices** window, click **Job Settings**.



2. The following form is displayed to adjust the settings for the HDP600ii printer.

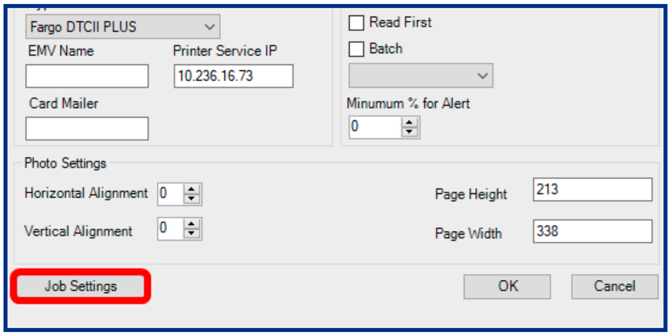


Field	Description
Image Transfer Premium Mode	When this option is selected, you can specify the type of card used in the printer. When the **Card Type** is selected, the **Transfer Dwell Time Front**, **Transfer Dwell Time Back**, and **Image Transfer Temperature Offset** settings are automatically set to the optimum values. If this field is not selected, these settings are not applied.
Transfer Dwell Time Front	Sets the speed at which the card moves through the transfer section in the printer. This setting affects the front of the card transfer speed.
Transfer Dwell Time Back	Sets the speed at which the card moves through the transfer section of the printer. This setting affects the back of the card transfer speed.
Image Transfer Temperature Offset	Sets the temperature of the transfer roller when applying the film to the card.
Dye Sub (YMC) Temperature Offset	Controls the temperature of the print head when printing the Yellow, Magenta, and Cyan panels onto the card. Increase the setting to darken the image and decrease the setting to lighten the image.
Resin (K) Temperature Offset	Controls the temperature of the print head when printing the black resin panel onto the card. Increase the setting to darken the image and decrease the setting to lighten the image.
MultiPass Front	When enabled, a second layer of film is applied to the front of the card. This should not be used if the inhibit panel is being used on the front of the card.
MultiPass Back	When enabled, a second layer of film is applied to the back of the card. This should not be used if the inhibit panel is being used on the back of the card.

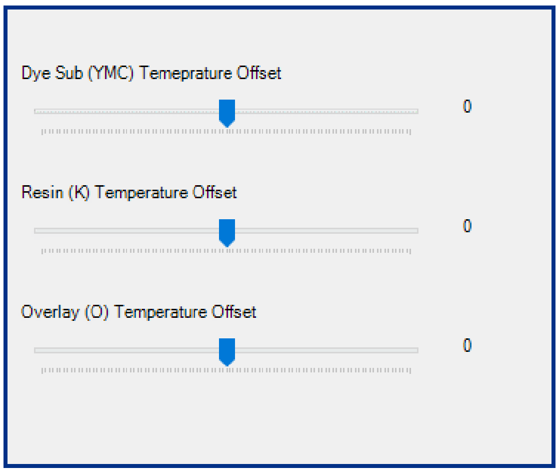
Job Settings for DTCii Plus Printer

Additional job settings can be configured for the DTC®ii Plus printer.

1. In the TRISM 7 **Devices** window, click **Job Settings**.



2. The following form is displayed to adjust the settings for the DTCii Plus printer.



Field	Description
Dye Sub (YMC) Temperature Offset	Controls the temperature of the print head when printing the Yellow, Magenta, and Cyan panels onto the card. Increase the setting to darken the image and decrease the setting to lighten the image.
Resin (K) Temperature Offset	Controls the temperature of the print head when printing the black resin panel onto the card. Increase the setting to darken the image and decrease the setting to lighten the image.
Overlay (O) Temperature Offset	Controls the temperature of the print head when applying the overlay material onto the card.

6.6 Active Directory

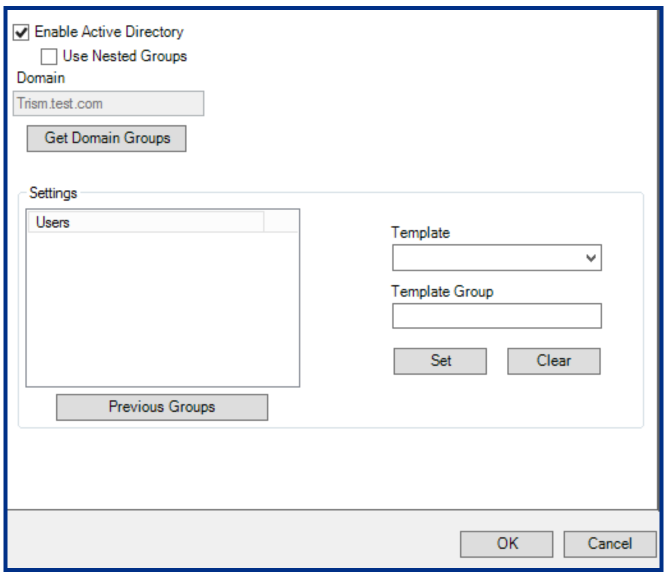
All users that are part of a network **Active Directory** can be automatically entered in TRISM. If Active Directory is enabled, user names and passwords cannot be changed using TRISM 7. The computer in use must be part of a domain, not a work group. If the computer is part of a work group, do not change any active directory settings.

On the main menu, click **Configure**. On the side menu, click **Active Directory**.

When Active Directory is enabled, the only non-active directory logins that may be used are:

- Access1
- Installer1
- Installer2

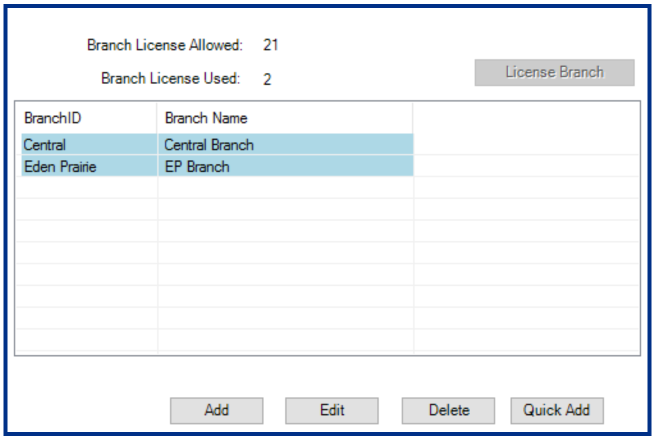
1. Check **Enable Active Directory**. TRISM 7 automatically searches and enters the domain name.
2. Click **Get Domain Groups** to display all groups in the Users window.
3. Select a group in the **Users** window and choose a template from the drop-down menu.
4. Click **Set** to save the template to the selected domain group.
   The domain group selected is displayed in the **Template Group** field.



6.7 Branches

Each branch must be licensed. For instructions on adding a branch license, see section **8.7 License**.

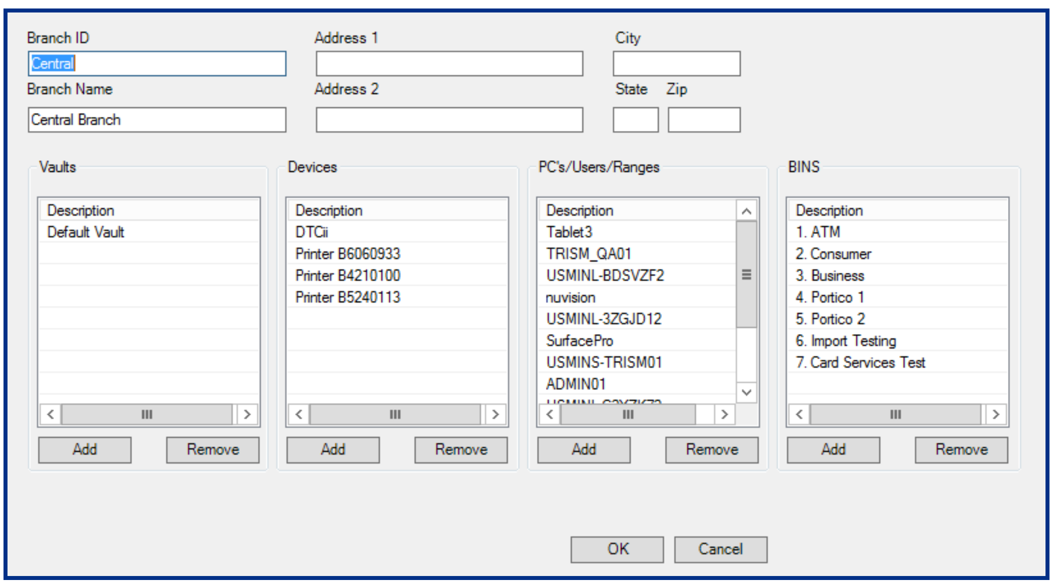
1. On the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Branches**.



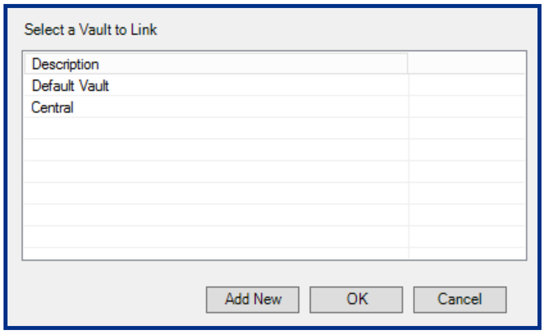
2. Select an unlicensed branch highlighted in red and click **License Branch**. A licensed branch is highlighted in blue.

6.7.1 Add vaults to a branch

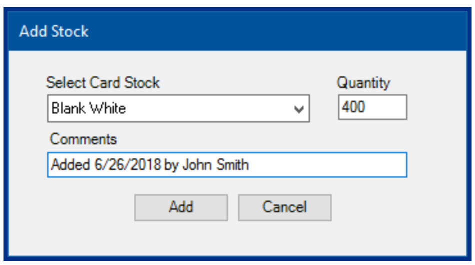
1. Select a branch and click **Edit**.
2. Click **Add** under the list of **Vaults**.



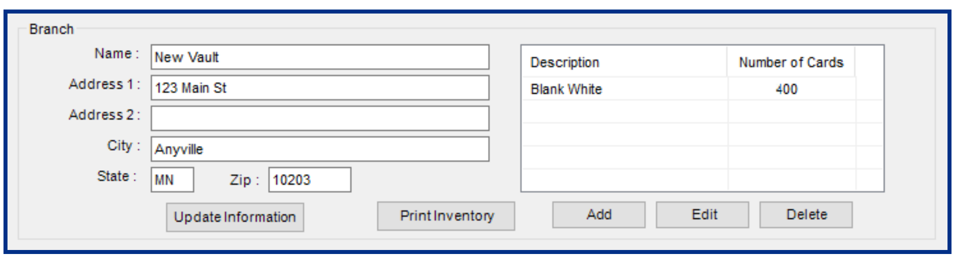
3. Click **Add New**. Dual control is enforced for accessing vaults, so a second user must enter their login credentials.



4. To add a central vault (the vault in which inventory is usually stored for distribution to branches), click **Add Central**. To add a non-central vault (no inventory is taken from a non-central vault and sent to other branches), click **Add Location**.
5. Enter the vault name and location, then click **OK**.
6. To add card stock to a vault, select the vault and click **Add**.
7. Select the card stock to add, enter the quantity of cards, and any comments required by your financial institution. Click **Add**.

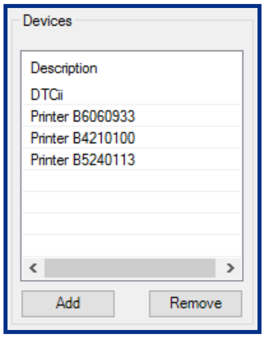


8. The vault inventory is updated.

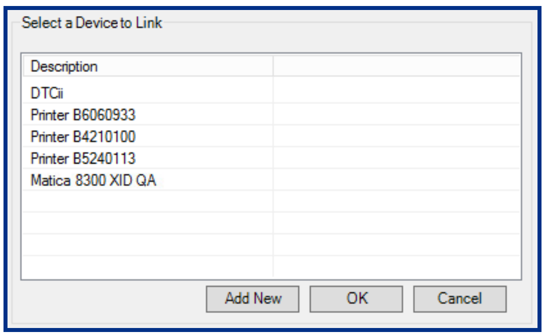


6.7.2 Add devices to a branch

1. Select a branch and click **Edit**.
2. Click **Add** under the list of devices.



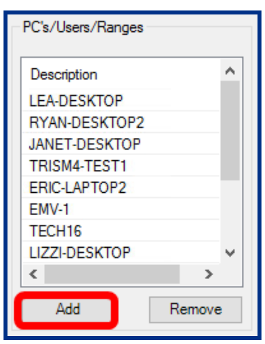
3. Select an existing device and click **OK** or click **Add New** to set up a new device. For more information, see section **6.5.1 Add a printer or embosser**



6.7.3 Add PCs/users/ranges to a branch

The following procedure is used only to add users when **Active Directory** is enabled.

1. Select a branch and click **Edit**.
2. Click **Add** under the **PC's/Users/Ranges** list.



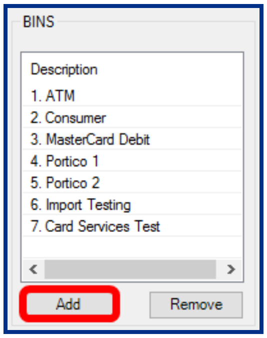
3. Select the method and enter the PC Name, IP Address/Range, or User Name, and click **OK**.

6.7.4 Add BINs to a branch

Before adding BINs to a branch, the BINs must be set up. See section **6.4 Formats**.

The following procedure is used only if different branches use different BINs. If all branches use the same BINs, do not add BINs to any branches. When the BINs list is blank, the branch automatically displays all BINs when ordering a card.

1. Select a branch and click **Edit**.
2. Click **Add** under the **BINS** list.



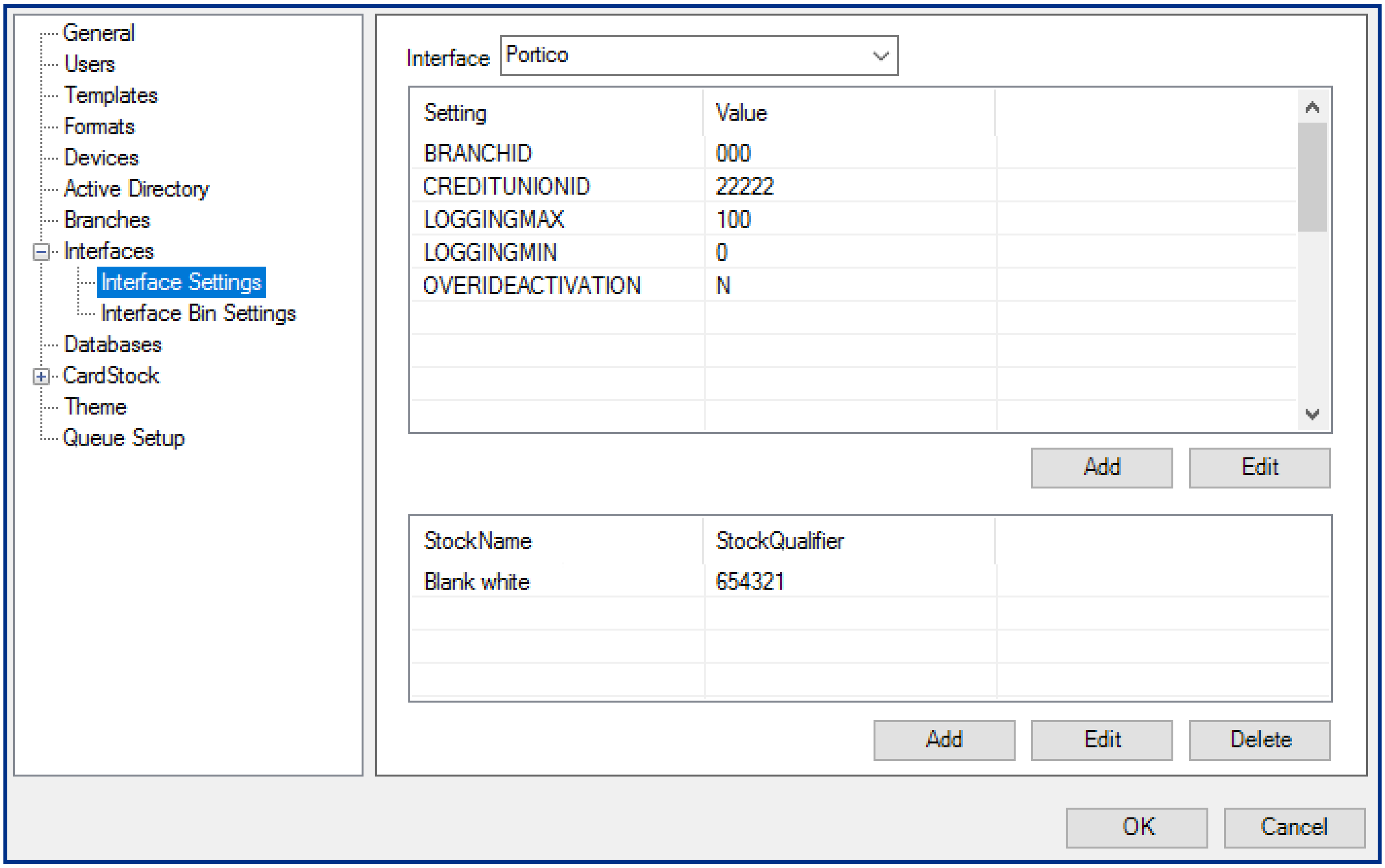
3. Select a BIN and click **OK**.

6.8 Interfaces

6.8.1 Interface Settings

Interface settings and values are determined by each individual interface and are generally not edited by financial institution personnel.

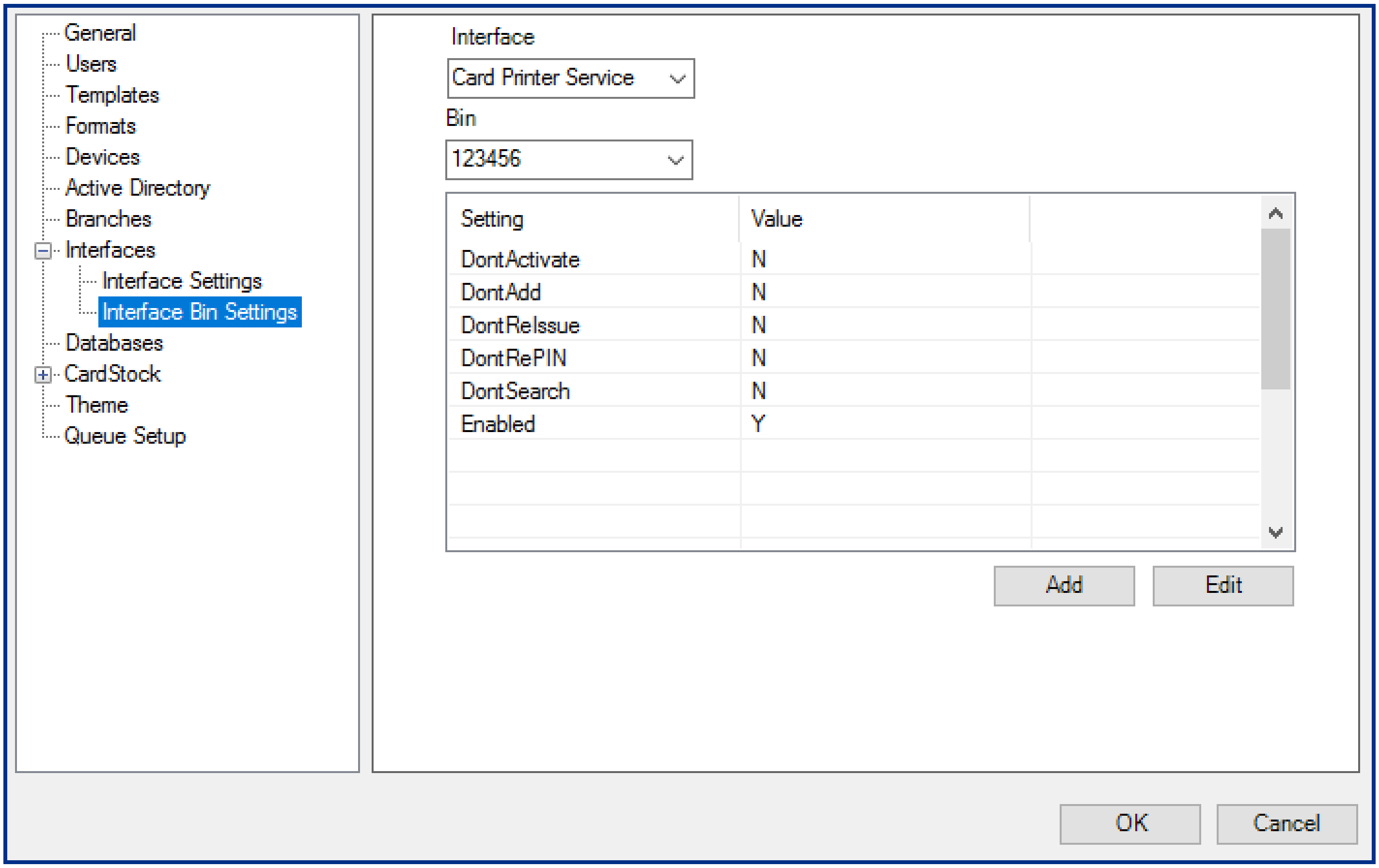
On the main menu, click the **Personal icon** > **Configure.** On the side menu, click **Interfaces**.



6.8.2 Interface BIN Settings

Interface BIN settings determine what actions can be performed by each BIN. Interface BIN settings and values are determined by each individual interface and generally not edited by financial institution personnel.

On the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Interfaces** > **Interface BIN Settings**.



6.9 Databases

Change logging options for SQL databases.

On the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Databases**.

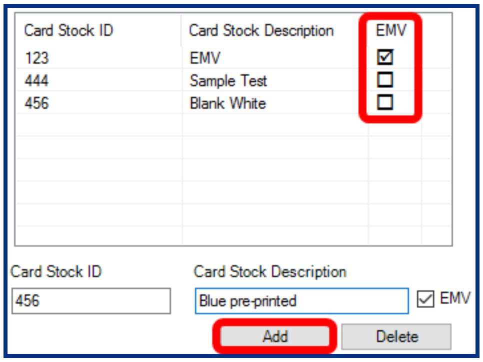
7.1 Card Stock

On the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Card Stock**.

7.1.1 Card Stock ID

To add different card stocks to the inventory menus:

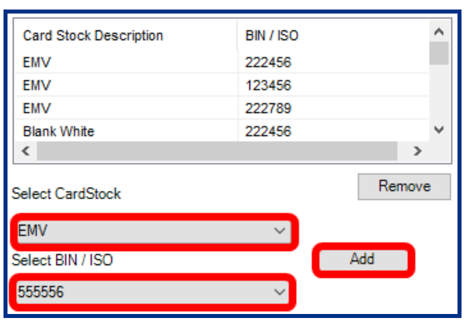
1. Enter the new card stock ID (may be alphanumeric) and description in the fields.
2. Select **EMV** if the card has a chip, then click **Add**.



7.1.2 Card Stock to BIN

To set the BIN number to be printed on each card stock type:

1. Select the card stock in the drop-down menu.
2. Select the BIN in the drop-down menu, then click **Add**.

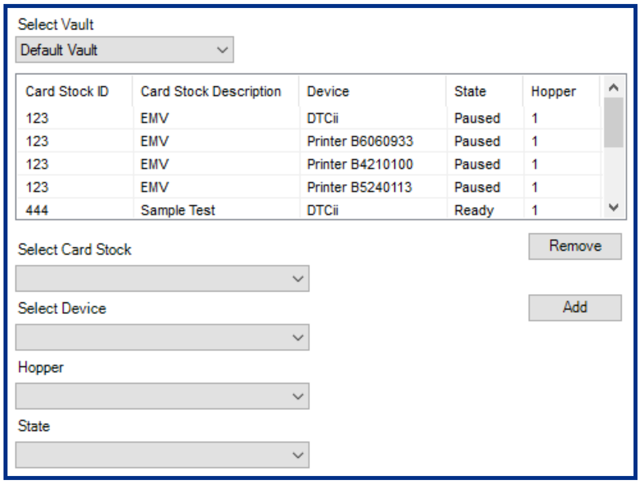


7.1.3 Card Stock to Vault/Device

Track the addition of card types to printers and embossers.

1. Select the vault that contains the card stock to be added, then select the card stock from the drop-down menu.
2. Select the printer or embosser to which card stock is to be added.
3. Select the card stock default state/status. Select the card stock default state/status. The default selections are:
   - **Ready**: the card prints immediately upon completion.
   - **Paused**: the card does not print until the state is changed to Ready or Manual in the Queue.
   - **Manual**: the card does not print until it is manually fed into the printer using the exception feed slot. This is not available on some printer models.

4. Click **Add**, then **OK**.



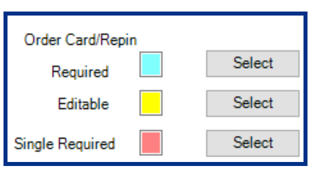
7.1.4 Add a new BIN or card stock

1. If adding a new BIN, add a new format (see section **6.4 Formats**).
2. Add a new card stock ID (see section **7.1.1 Card Stock ID**).
3. Link the new card stock ID to the appropriate BIN (see section **7.1.2 Card Stock to BIN**).
4. If you are using different BINs for different branches, add the BIN to the branch (see section **6.7.4 Add BINs to a branch**). If you are using the same BINs for all branches, go to the next step.
5. Add card stock to the branch vault (see section **6.7.4 Add BINs to a branch**).
6. Link the new card stock to the vault and device (see section **7.1.3 Card Stock to Vault/Device**).
7. Card stock can be added to devices in Device Access (see section **5.1 Device Access**).

7.2 Theme

Allows you to customize the text box color of the **Edit Permissions**, **Order Card**, and **Re-PIN** menus.

Click **Select** to choose a color, then click **OK** to apply changes.



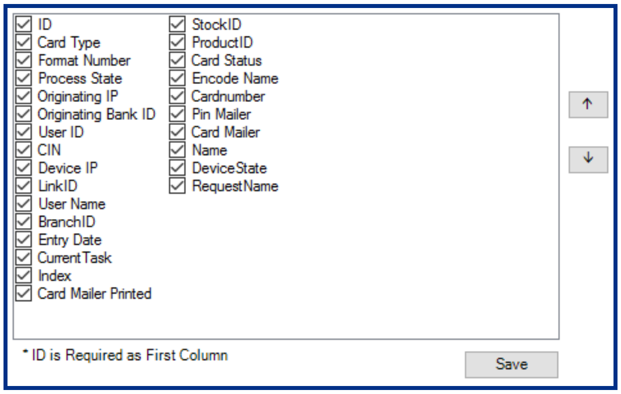
7.3 Queue Setup

Change the order in which columns are displayed in the Queue.

1. On the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Queue Setup**.
2. Select a field and click the arrows to change its order.

   Note: The ID field must be first and must be checked.

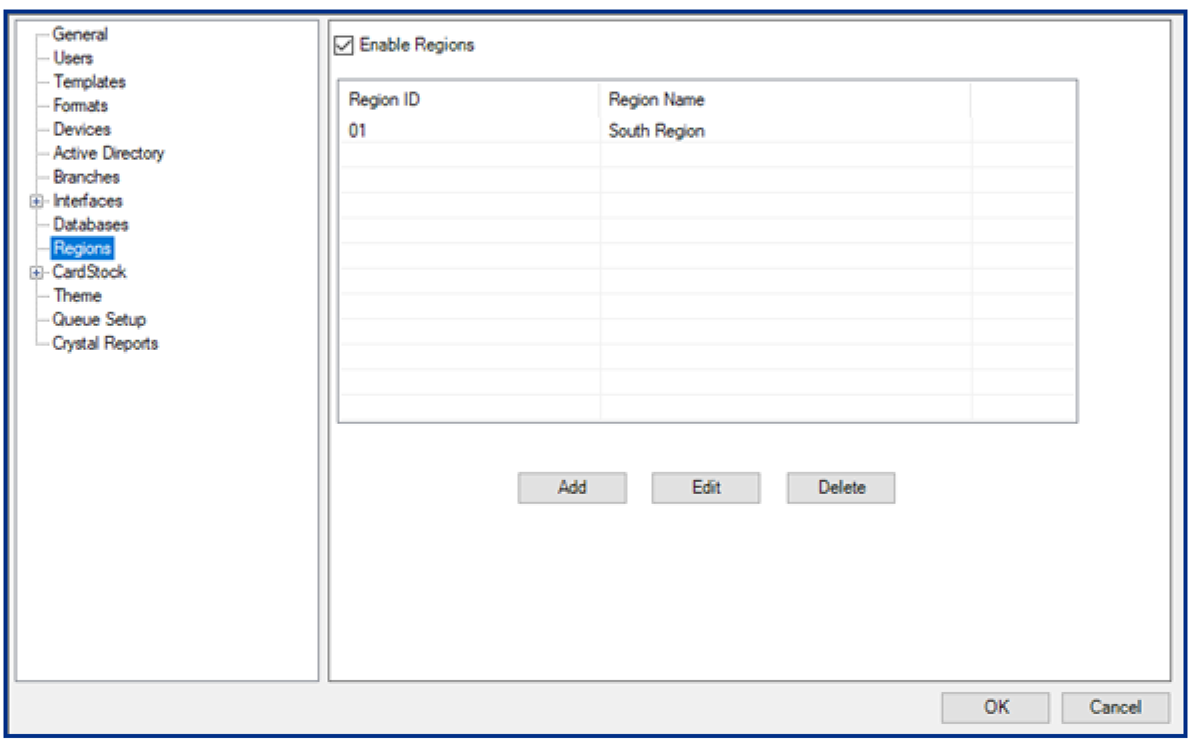
3. Clear the check box to hide the field in the Queue.
4. Click **Save**.



7.4 Regions

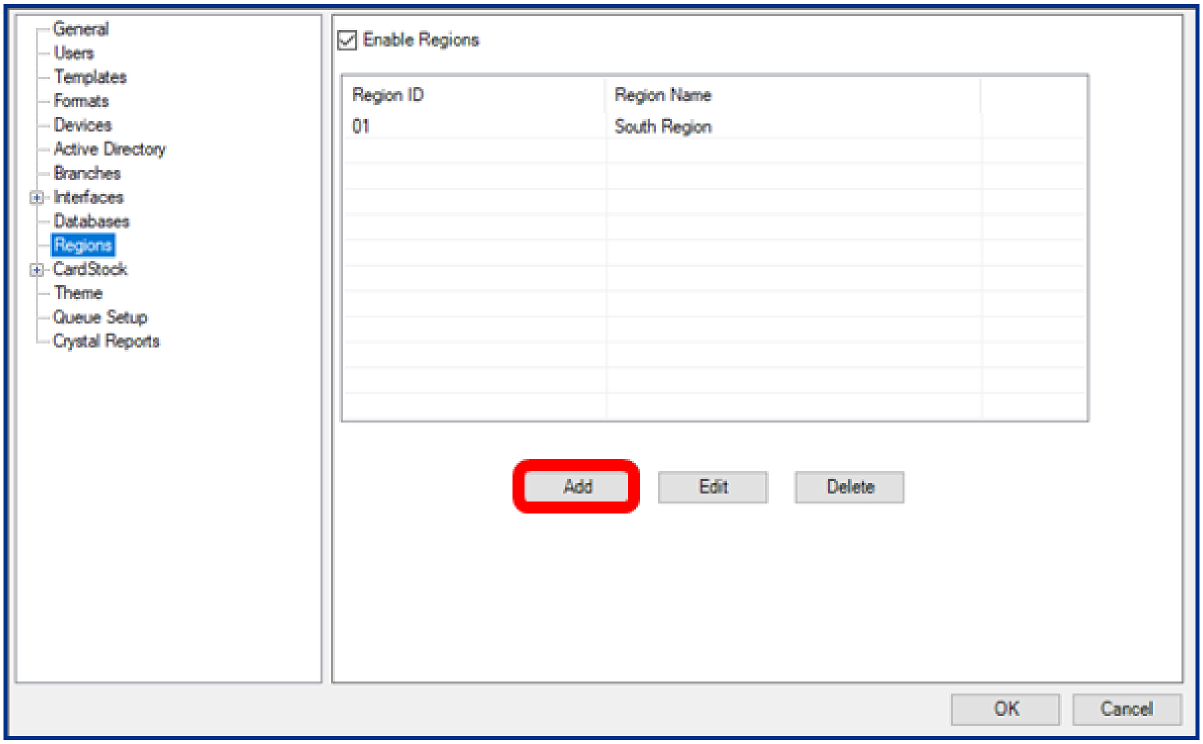
Regions are groups of branches that are linked together to allow you, with correct permissions, access to the regional queue and devices. They also allow you to redirect jobs to any other device in the region.

To manage the regions setup, on the main menu, click the **Personal icon** > **Configure**. On the side menu, click **Regions**.

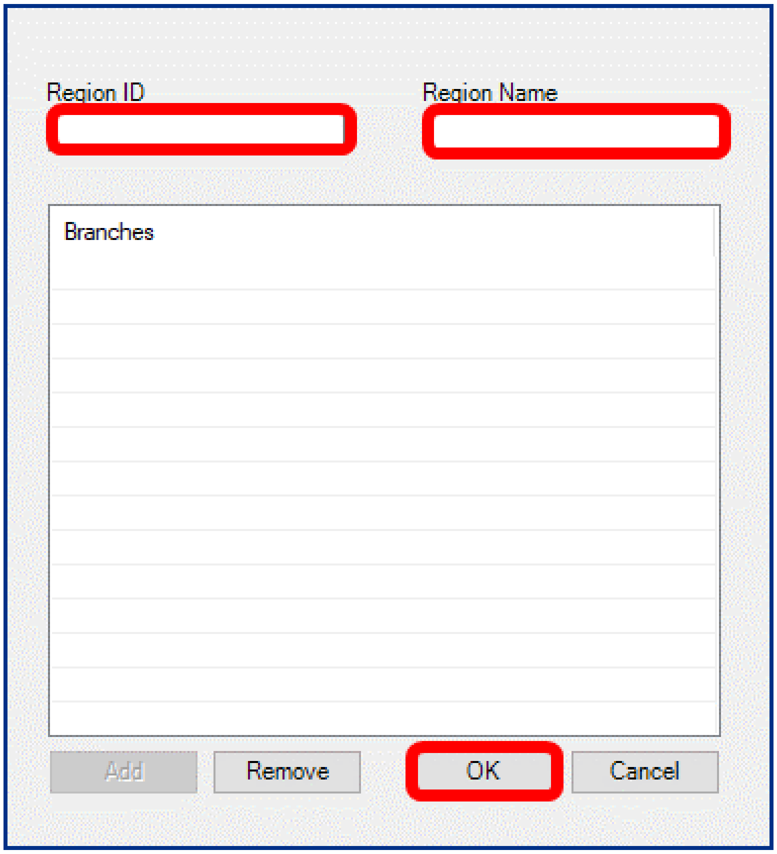


7.4.1 Add a region

1. On the Regions configuration screen, click **Add**.

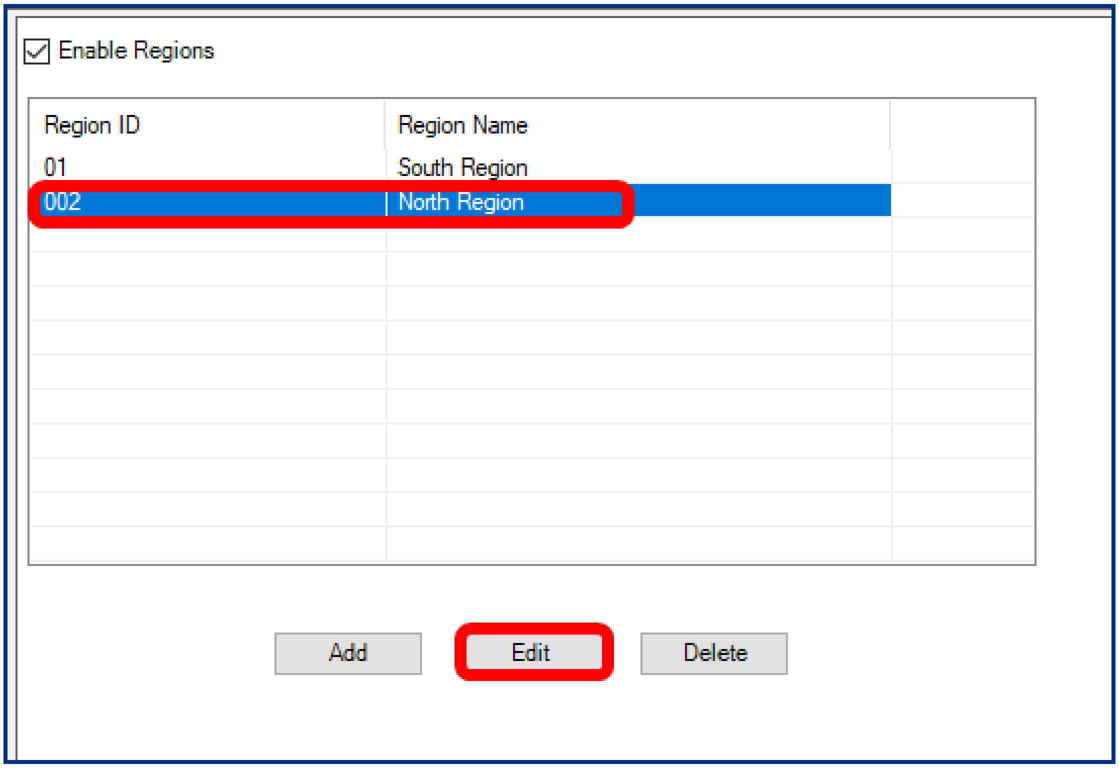


2. Enter a **Region ID**, **Region Name**, and click **OK**.



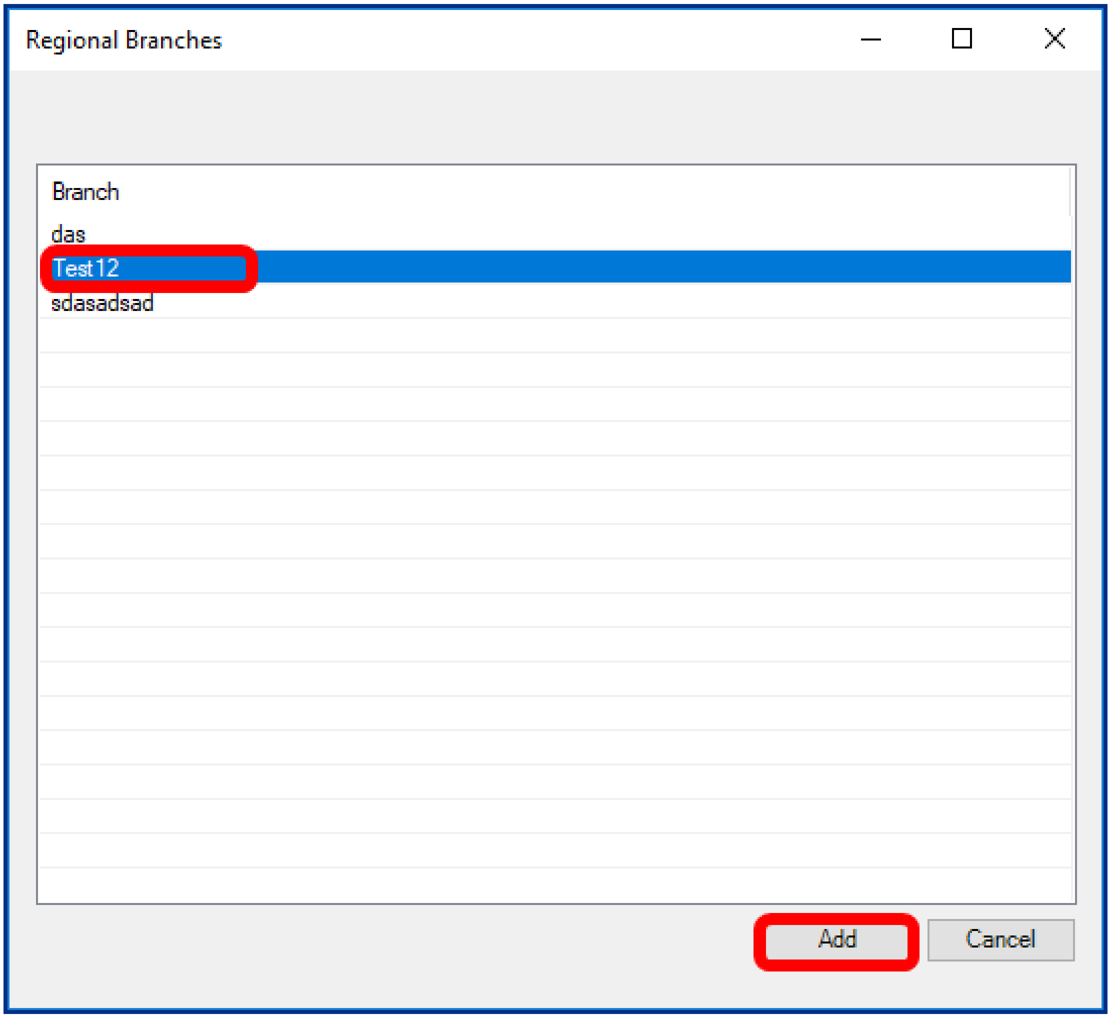
7.4.2 Add a new branch to a region

1. On the Regions configuration screen, select a region and click **Edit**.



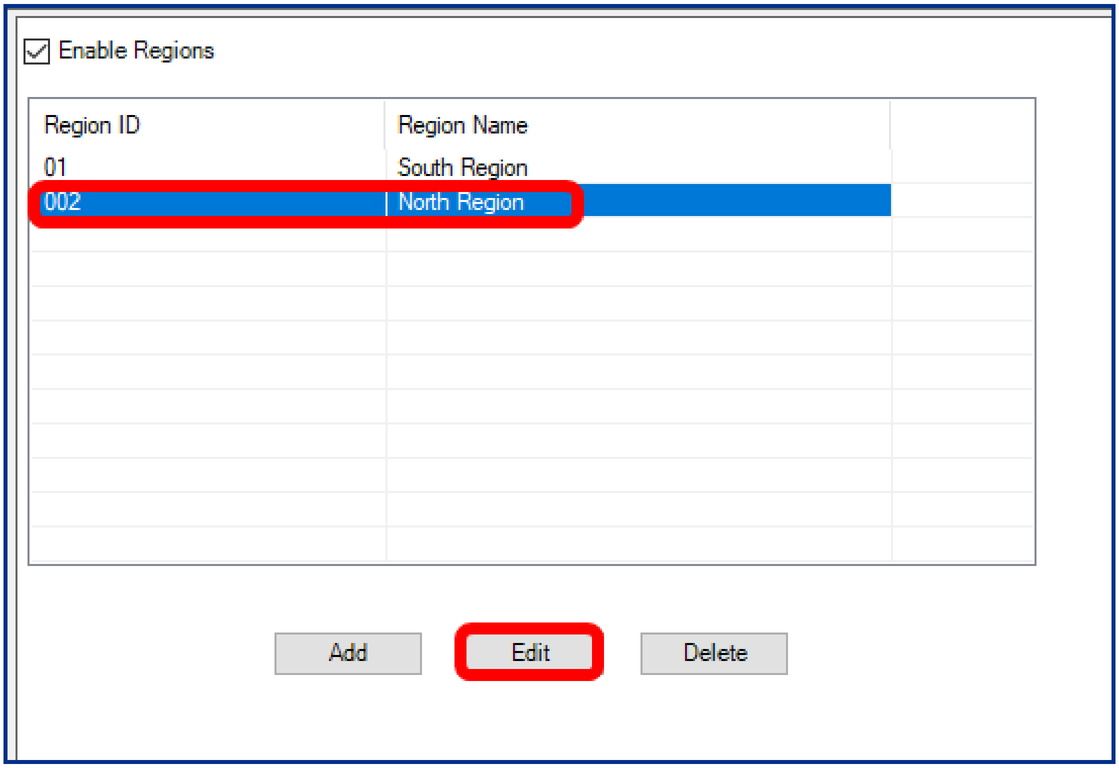
2. On the Edit screen, click **Add**.

3. From the list, select the branch to add to the region and click **Add**.

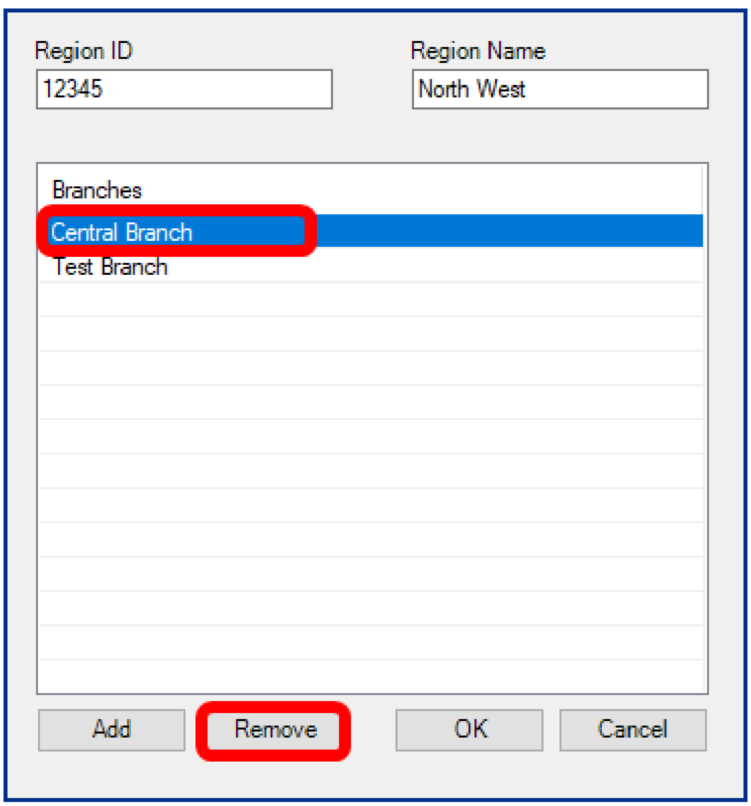


7.4.3 Remove a branch from a region

1. On the Regions configuration screen, select a region and click **Edit**.



2. Select the branch to remove from the region and click **Remove**.



Section 08

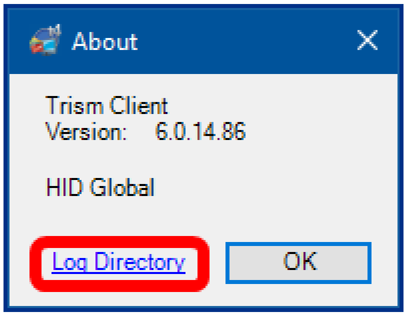
Help

8.1 About

View the version of TRISM 7 currently installed.

On the main menu, click the **Personal icon** > **Help** > **About**.

To view TRISM data and error logs, click **Log Directory**.



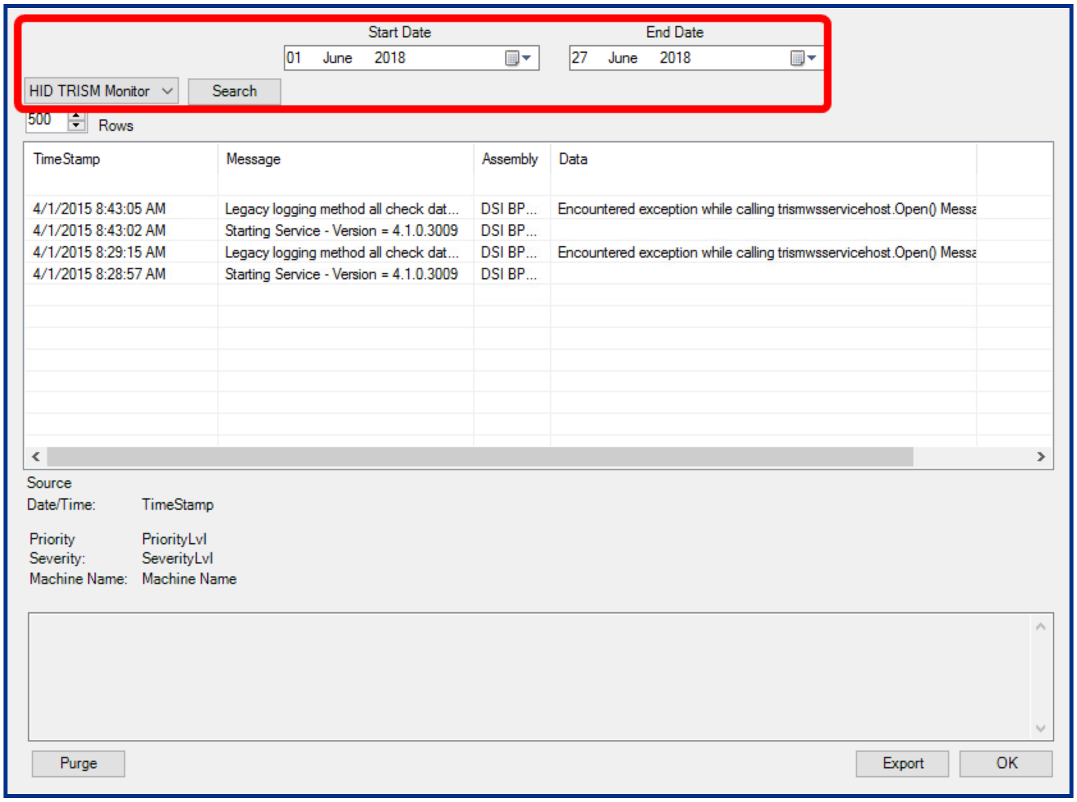
8.2 Support Documents

View TRISM support documents such as the user manual and daily procedures.

8.3 Data Log

View the log of all actions performed by third party services.

1. On the main menu, click the **Personal icon** > **Help** > **Data Log**.
2. Select the dates to search by in the **Start Date** and **End Date** drop-down menus.
3. Select the service in which to view the log. Click **Search**.

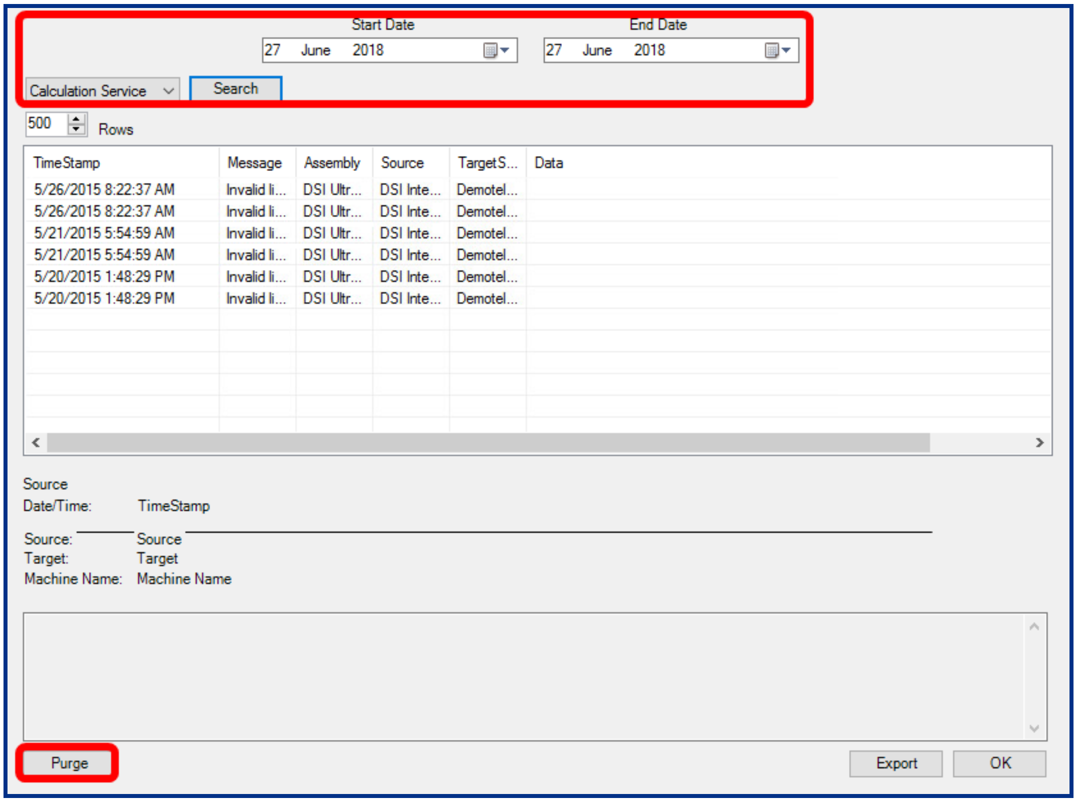


Button	Description
Purge	Deletes the log.
Export	Exports log to a notepad file.

8.4 Error Log

View the log of all errors encountered by third party services.

1. On the main menu, click the **Personal icon** > **Help** > **Error Log**.
2. Select the dates to search by in the **Start Date** and **End Date** drop-down menus.
3. Select the service in which to view the log. Click **Search.**
4. Click **Purge** to delete the log.



8.5 Client Information

On the main menu, click the **Personal icon** > **Help** > **Client Information.**

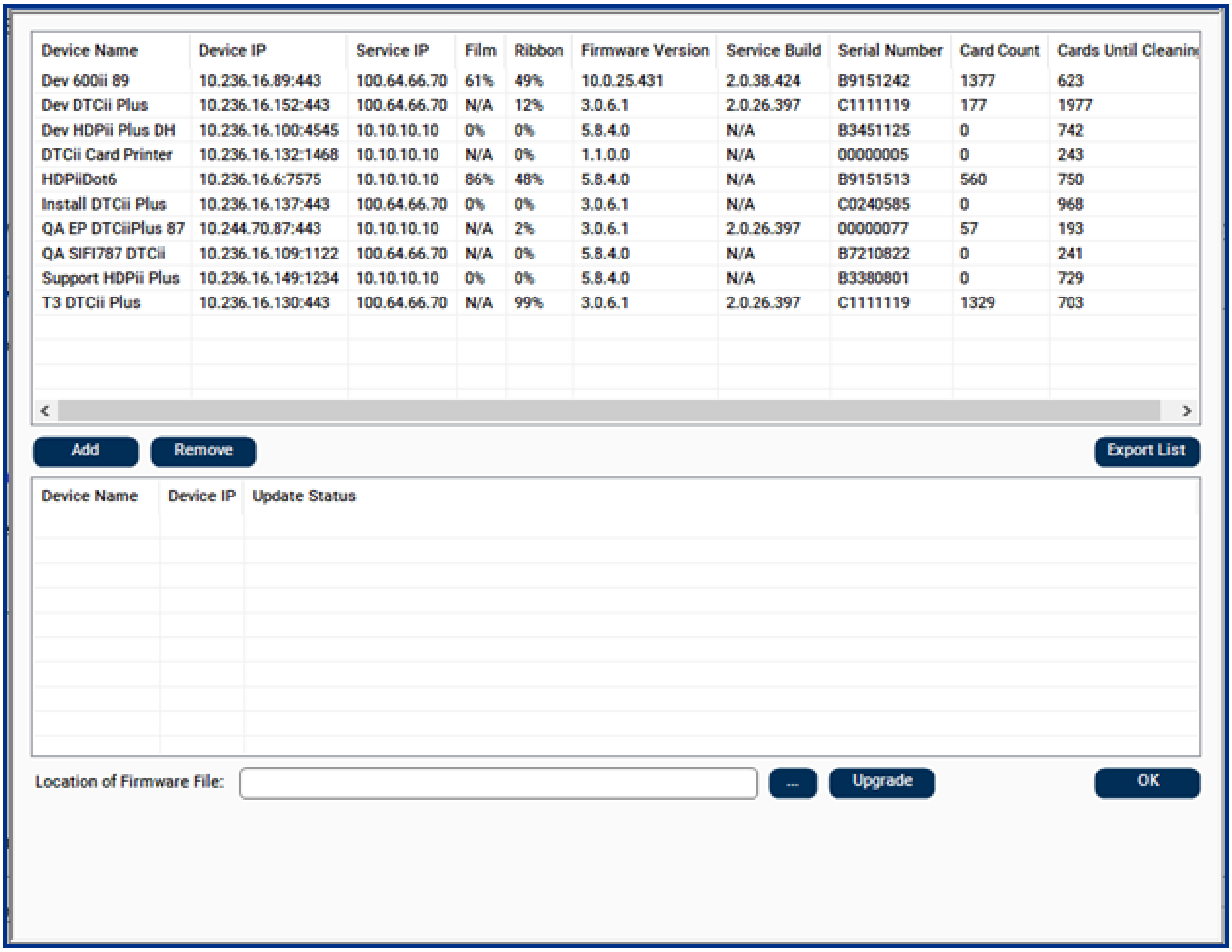
Client Information displays a list of each TRISM workstation and the following information associated with each workstation:

- User ID
- TRISM Version
- Last Login
- Last Logout
- PIN Pad Serial Number

8.6 Device Information

The Device Information screen is used to display information about currently configured driverless printers such as the HDP600ii and DTCii Plus.

On the main menu, click the **Personal icon** > **Help** > **Device Information**.



Device Name	Device IP	Service IP	Film	Ribbon	Firmware Version	Service Build	Serial Number	Card Count	Cards Until Cleanin
Dev 600ii 89	10.236.16.89:443	100.64.66.70	61%	49%	10.0.25.431	2.0.38.424	B9151242	1377	623
Dev DTCii Plus	10.236.16.152:443	100.64.66.70	N/A	12%	3.0.6.1	2.0.26.397	C1111119	177	1977
Dev HDPii Plus DH	10.236.16.100:4545	10.10.10.10	0%	0%	5.8.4.0	N/A	B3451125	0	742
DTCii Card Printer	10.236.16.132:1468	10.10.10.10	N/A	0%	1.1.0.0	N/A	00000005	0	243
HDPiiDot6	10.236.16.6:7575	10.10.10.10	86%	48%	5.8.4.0	N/A	B9151513	560	750
Install DTCii Plus	10.236.16.137:443	100.64.66.70	0%	0%	3.0.6.1	N/A	C0240585	0	968
QA EP DTCiiPlus 87	10.244.70.87:443	10.10.10.10	N/A	2%	3.0.6.1	2.0.26.397	00000077	57	193
QA SIFI787 DTCii	10.236.16.109:1122	100.64.66.70	N/A	0%	5.8.4.0	N/A	B7210822	0	241
Support HDPii Plus	10.236.16.149:1234	10.10.10.10	0%	0%	5.8.4.0	N/A	B3380801	0	729
T3 DTCii Plus	10.236.16.130:443	100.64.66.70	N/A	99%	3.0.6.1	2.0.26.397	C1111119	1329	703

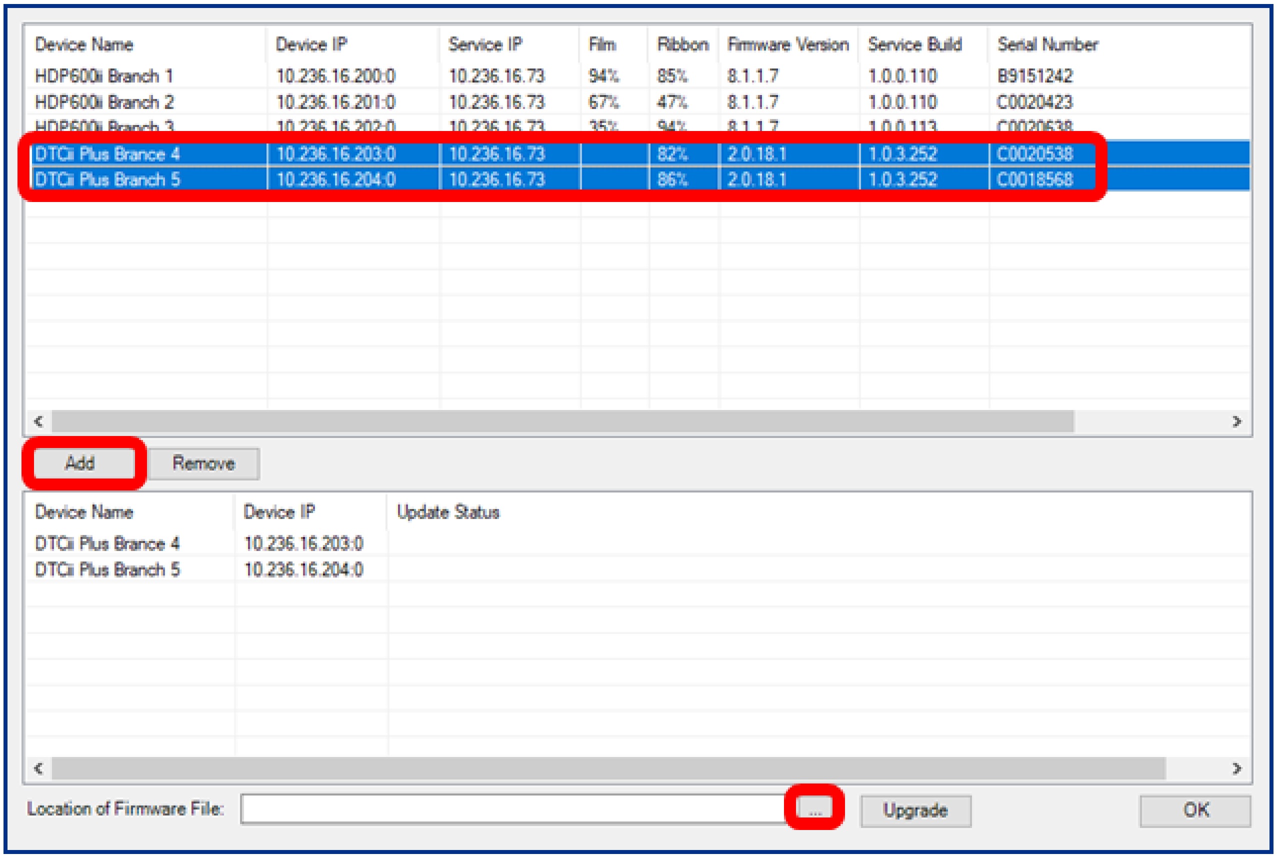
Device Information lists each printer and the following information associated with each printer:

- Device Name: The logical printer name in TRISM
- Device IP: The network IP address of the printer
- Service IP: The network IP address of the print server. (The server running the Card Printer Service.)
- Film: The percentage of transfer film left on the spool
- Ribbon: The percentage of ribbon left on the spool
- Firmware Version: The printer firmware version
- Service Build: The printer software build version
- Serial Number: The serial number of the printer
- Card Count: The number of cards currently in the printer
- Cards Until Cleaning: The number of cards that can be printed before the printer must be cleaned.

8.6.1 Upgrading the printer firmware

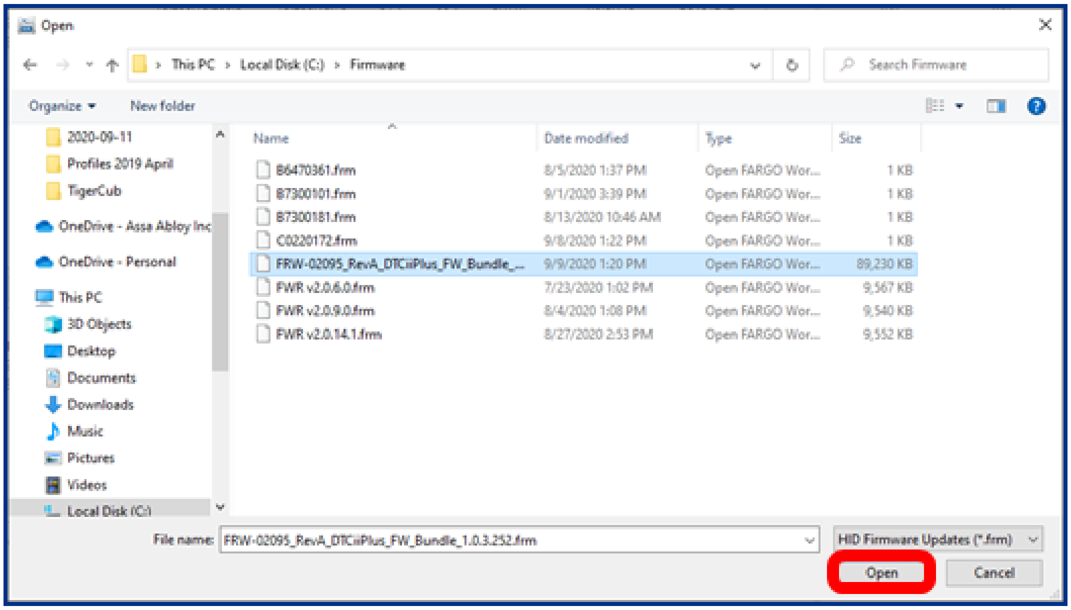
To upgrade the printer to a new firmware version, you need to have the firmware file on the system running the TRISM Client.

1. Select the printers to be updated and click **Add**. The selected printers are added to the update list that is displayed in the lower table.



2. Select the firmware file to install on the printers. Click **...** (Browse) to navigate to the firmware file on the TRISM Client.

3. Select the firmware file to install and click **Open**.



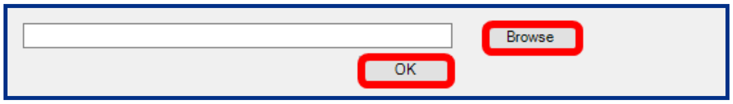
4. Once the printers and firmware are selected, click **Upgrade** to begin the upgrade.

Note: During the upgrade process, a status meter displays the percent completed of the firmware package to the device being upgraded. In additionm if you attempt to exit the **Device Information** screen an error message is dispayed until all selected devices are fully upgraded.

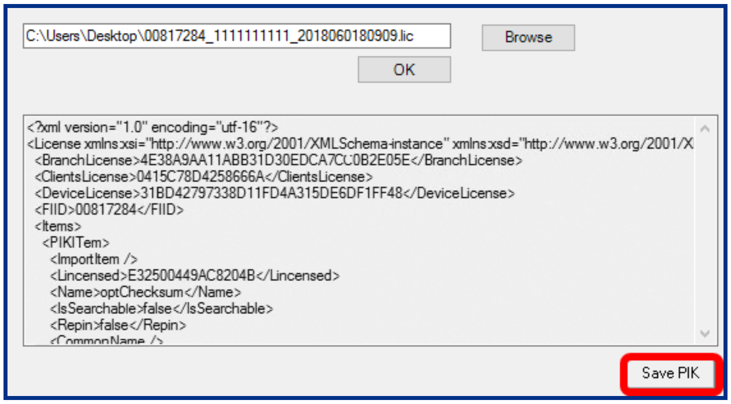
8.7 License

All licenses (for example, device, PIN pad, MSR, workstation, and so on) are loaded into TRISM in this window.

1. On the main menu, click the **Personal icon** > **Help** > **License**.
2. Click **Browse** to navigate to the license file.
3. Click **OK**.



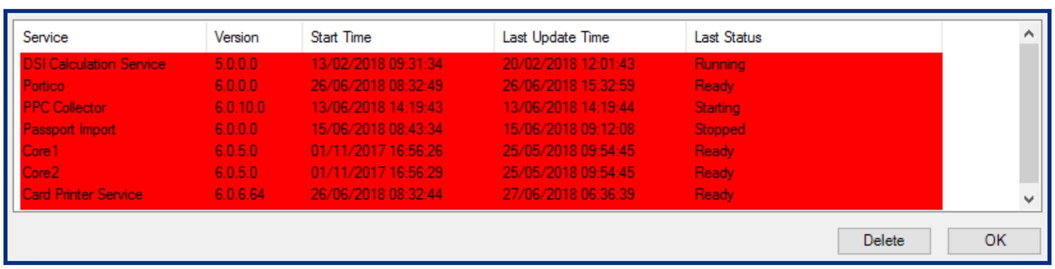
4. Click **Save PIK**.



8.8 System Status

Displays the **Version**, **Start Time**, **Last Update Time**, and **Last Status Time** of each service.

On the main menu, click the **Personal icon** > **Help** > **System Status**.



Service	Version	Start Time	Last Update Time	Last Status
DSI Calculation Service	5.0.0.0	13/02/2018 09:31:34	20/02/2018 12:01:43	Running
Portico	6.0.0.0	26/06/2018 08:32:49	26/06/2018 15:32:59	Ready
PPC Collector	6.0.10.0	13/06/2018 14:19:43	13/06/2018 14:19:44	Starting
Passport Import	6.0.0.0	15/06/2018 08:43:34	15/06/2018 09:12:08	Stopped
Core1	6.0.5.0	01/11/2017 16:56:26	25/05/2018 09:54:45	Ready
Core2	6.0.5.0	01/11/2017 16:56:29	25/05/2018 09:54:45	Ready
Card Printer Service	6.0.6.64	26/06/2018 08:32:44	27/06/2018 06:36:39	Ready

Delete OK

- **Green**: status table in database is running.
- **Red**: status table has not been updated for five minutes. Red status does not indicate that the service is down.

Appendix A

Reference

A.1 System requirements

A typical TRISM installation consists of a server or virtual machine (Host) and one or more workstations. A dedicated server or VM is strongly recommended to prevent network downtime, as aspects of installation, setup, configuration, and updates may require system reboots. The server must be provided by the financial institution. The hardware and software requirements for TRISM installations are listed in the following table.

	Server (Host)	**Workstation (Client)**
Minimum processor speed	2.0 GHz	2.0 GHz
Minimum available RAM	16 GB	4 GB
Available hard disk space	50 GB	10 GB
Video resolution	SVGA (1024 × 768)	SVGA (1024 × 768)
Operating system	Microsoft Windows Server 2016, 2019, 2022	Windows 10, 11
Database software	SQL Server 2016 (SP2), 2017, 2019, Standard, Express, or Enterprise Edition	N/A

Note:

- A dedicated server and SQL instance is strongly recommended on the server. High volumes of printers, mixed printer environments or embossers may require a separate printer server.
- It is recommended to use the Standard or Enterprise edition of SQL Server in a system containing 25 or more branches.

A.2 Card layouts

Refer to the following guidelines when setting up card formats.

Card Layouts	
Card size	3 3/8" × 2 1/8"
Bleed	1/8" optimal; 3/32" minimum
Clearance	Text/logos at least 3/32" from edge of card, brand marks, magnetic stripe, EMV chip, or signature panel
Visa Specifications	
Visa brand mark	9.75 mm × 20.5 mm
Distance from right of brand mark to right edge of card	2 mm
Distance from bottom of brand mark to bottom edge of card	2 mm
MasterCard Specifications	
MasterCard brand mark	11.3 mm × 19.25 mm
Distance from right of brand mark to right edge of card	2 mm
Distance from bottom of brand mark to bottom edge of card	3 mm
Custom Images	
Image file type	.jpeg, .bmp
Aspect ratio	3:2
Minimum resolution	1015 × 640

A.3 Custom image guidelines

Your financial institution reserves the right to determine, in its sole discretion, whether a submitted image is accepted or rejected. All images submitted must have the consent of the owner including those images downloaded from the internet.

Any images that contain the following items are not accepted:

- Company names, logos, slogans, third party brands, trademarks, copyrighted items, or any image which may be protected by trademark or copyright.
- Professional athletes, politicians, celebrities, public figures (excluding permission-based photos of you, your family members, or friends photographed with a famous person).
- Depictions of illegal activities or otherwise inappropriate behavior.
- Addresses, phone numbers, social security numbers or other personal identification numbers, URL addresses.
- Items that may be considered obscene, offensive, indecent, provocative, nude, semi-nude, lewd, or otherwise inappropriate images, including profanity.
- Political affiliations or other socially sensitive images.
- Racially sensitive material.
- Artwork which was created by a third party for which you have not obtained permission from the owner to use.
- Cartoon or other characters for which express permissions have not been obtained. This includes images that you have not created and do not have permission to use.
- Any other image which is deemed unacceptable and reflects negatively on the branding message of your financial institution.

A.4 Permission descriptions

A.4.1 Security

Permission	Description
Template Security Level	Determines if you can reset a user's password when you have the Add User permission or locks the account if you have the Edit User permission.
Edit Security Template (Add/Edit/Delete)	Allows you to add, edit, or delete templates.
Edit Security Permissions	Allows you to edit a template. This is specifically for modifying the templates without having the ability to add or remove the templates.
View All Branches	Allows you to access all branches even if the system is configured to only show your branch. This is useful for users who float.
Log in to Thost	Allows you to log in to the T-Host server.
License File	Allows you to see the License Section and allows you to add/update the licenses with the supplied file.
Reset Other User Passwords	Allows you to reset other user's passwords. **Note:** This does not apply to systems configured with Active Directory.
Import Configuration	Allows you to import a saved configuration file.
Export Configuration	Allows you to export and save a configuration file to import later.
View Regional Branches (Regional Queue)	Allows you to access regional branches even if the system is configured to only show your branch. This is useful for users who float.

A.4.2 Order cards

Permission	Description
View Order Card	Allows you to access the **Order Card** option from the **Request** menu on the main toolbar and to access the **Order Card** button on the quick launch toolbar.
View Actions	Allows you to access the **Request** menu on the main toolbar.
Edit Permissions	Allows you to access the **Request** > **Edit Permissions** option on the main toolbar.
RePIN a Card	**With PIN Verification**: Allows you to see the **Request** > **Re-PIN** option. **Override**: No longer used. **Enforce Card**: Allows you to see the Re-PIN screen. Card must be swiped to re-PIN. Re-PIN is not possible if card is not present.
Order Card Express	Order Card screen opens automatically upon log in.
PIN Mailer Only	Allows you to access the **Request** > **PIN Mailer** option on the main toolbar.
Print Transaction Report	Allows you to access the Transactional Print screen when you successfully order a card. The Transactional Report is a sign off sheet the customer signs to state they had a card made. Many financial institutions do not use this or have their own.
Hide Customer Info on Transaction Report	Allows you to access the **Print Transactional Report** option to mask the customer data on the report. This is for security.
Read a Card	Allows you to access the **Request** > **Read a Card** option on the main toolbar.
CVV2 Calculator	Allows you to access the **Request** > **CVV2 Calculator** option on the main toolbar.
Auto Select First Card Status	Allows you to have the Card Status in Order Card to automatically be populated with the first option. This is for improved automation.

A.4.3 Queue

Permission	Description
View Queue	Allows you to access the **Queue** menu on the main toolbar and to access the **Queue** button on the quick launch toolbar.
Edit Card	Allows you to edit card records in the Queue.
Delete Cards	Allows you to delete card records in the Queue.
Delete from any Branch	Allows you to delete cards from other branches and requires you to have the View All Branches permission.
Purge Queue Requests	Allows you to access the **Purge Queue Request** button on the quick launch toolbar to delete all pending queue requests. This is used to troubleshoot systems that have a lot of traffic in the queue.

A.4.4 Reports

Permission	Description
View Reports	Allows you to access the **Reports** menu from the main toolbar and the **Reports** button on the quick launch toolbar.
View Local Reports	Allows you to see the predefined reports as well as custom reports that have been saved.

Permission	Description
Run End of Day Reports	Allows you to access the **End of Day** option in the **Reports** menu of the main toolbar and the **End of Day button** on the quick launch toolbar.
Use Classic View	Allows you to view the End of Day report in the classic format. This is the default view.
Run End of Day Reports	**User:** Allows you to run the End of Day report in user mode. This report displays individual branch options only. **Admin:** Allows you to run the End of Day report in Admin mode which shows all branches and formats.
Show Mask Card Number	Shows masked card numbers through the entire TRISM system. This does not include some logs that have this data.
Force EOD Masked Card Number	Allows you to have all card numbers on the end of day report masked. This is for security.
View Non-Financial Reports	Allows you to have access to the Non-Financial report in the **Reports** menu of the main toolbar.
View Individual Reports	Allows you to access the Management Reports Section that allows you to save/load reports created by the financial institution.
View Existing Reports	Allows you to see the Historical Card Balance Report in the **Reports** menu of the main toolbar.
Print Reports	Allows you to print reports.
View Data Log	Allows you to access the **Data Log** option in the **Help** menu of the main toolbar.
View Error Log	Allows you to access the **Error Log** option in the **Help** menu of the main toolbar.
View Client Information	Allows you to access the **Client Information** option in the **Help** menu of the main toolbar.
Device Access	Allows you to access the Device Access report in the **Reports** menu of the main toolbar.
Vault Supply	Allows you to access the Vault Supply Tracking report in the **Reports** menu of the main toolbar.
Device Error	Allows you to access the Device Error report in the **Reports** menu of the main toolbar.
Spoiled Card	Allows you to access the Spoiled Card report in the **Reports** menu of the main toolbar.
Spoiled Card For all Branches	Allows you to access the Spoiled Card report with all branches available in the **Reports** menu of the main toolbar.
Branch Activity	Allows you to access the Branch Activity report in the **Reports** menu of the main toolbar.
Device Access Report (CardStock)	Allows you to access the Device Access report from the **Profile** > **Reports** menu.
Background	Allows you to have access to the Background report from the **Profile** > **Reports** menu.
Historical Transfers	Allows you to have access to the Historical Transfers report from the **Profile** > **Reports** menu.
Historical Vault	Allows you to have access to the Historical Vault report from the **Profile** > **Reports** menu.
Historical Central Vault	Allows you to have access to the Historical Central Vault report from the **Profile** > **Reports** menu.
Customer Removal	Allows you to have access to the Customer Removal tool from the **Profile** > **Reports** menu.
Device Cleaning Report	Allows you to have access to the Device Cleaning Report from the **Profile** > **Reports** menu.

A.4.5 Inventory

Permission	Description
View Inventory	Allows you to access the **Profile** > **Inventory** menu.
Device Unlock	Allows you to access the **Device Unlock** function (card add and removal) from the **Profile** > **Inventory** menu.
View Card Stock	No longer used.
View Vault Inventory	Allows you to access the **Inventory** > **Vault Inventory** option from the **Profile** > **Inventory** menu. **Central View:** Allows you to access the left side of the Vaults which contain all the Central Vaults in the Vault Inventory screen. • **Central Admin**: Allows you to access the **CardStock** options (add, edit, or remove) and allows you to Send Transfers. This also allows you to add more Central Vaults. • **Central User**: Allows you to have access to Central Branch Transfers in the transfers section of the Vault Inventory screen. **Branch View:** Allows you to view the right side of the Vaults which contain Branch Level Vaults in the Vault Inventory screen.
View all Vaults	Allows you to view all vaults in the Vault Access screen.
Show Alerts (Notifications)	**Ribbon/Film Alert:** Allows you to be notified once the film or ribbon has fallen below a certain percentage. **Cardstock Alert:** Allows you to get notified once the cardstock inventory amount drops below a given value.

A.4.6 Configure

Permission	Description
View Settings	Allows the user to access the Configure option on the main toolbar
User Editing	**Add User:** Allows you to access the Add User button in the User section of the Configuration screen. **Edit User:** Allows you to access the Edit User button in the User section of the Configuration screen. **Delete User:** Allows you to access the Delete User button in the User section of the Configuration screen.
Card Stock	**Add**: Allows you to add cardstock to vaults in the Vault Inventory screen. **Delete**: Allows you to delete cardstock to vaults in the Vault Inventory screen. **Edit**: Allows you to edit cardstock to vaults in the Vault Inventory screen. **Rename**: No longer used. **Process:** No longer in used.
General Edit	Allows you access to the **General** option on the left side of the Configuration screen.
User Editing	Allows you access to the **Users** option on the left side of the Configuration screen.
Template Editing	Allows you access to the **Templates** option on the left side of the Configuration screen.
Format Editing	Allows you access to the **Formats** option on the left side of the Configuration screen.
Device Editing	Allows you access to the **Devices** option on the left side of the Configuration screen.
Active Directory Edit	Allows you access to the **Active Directory** option on the left side of the Configuration screen.
Interface Editing	Allows you access to the **Interfaces** option on the left side of the Configuration screen.
CardStock Editing	Allows you access to the **CardStock** option on the left side of the Configuration screen.
Branch Editing	Allows you access to the Branches option on the left side of the Configuration screen. **Add**: Allows you to add branches in the Branch section of the Configuration screen. **Edit**: Allows you to edit branches in the Branch section of the Configuration screen. **Delete**: Allows you to delete branches in the Branch section of the Configuration screen.
Printers	**Add**: Allows you to add printers in the Devices section of the Configuration screen. **Edit**: Allows you to edit printers in the Devices section of the Configuration screen. **Remove**: Allows you to remove printers in the Devices section of the Configuration screen.
Formats	**Add**: Allows you to add formats in the Formats section of the Configuration screen. **Edit**: Allows you to edit formats in the Formats section of the Configuration screen. **Remove**: Allows you to remove formats in the Formats section of the Configuration screen.
Show Healthbar	Allows you to see the red and green status lights in the main toolbar.
Show System Status Table	Allows you to access the **Help** > **System Status** option of the main toolbar.
Crystal Reports Editing	Allows you to enable or disable Crystal Reports licensing when used in a Citrix, Terminal Services, or VDI environment.

Permission	Description
Region Editing	Allows you to add, remove, or edit regions. Branches can be set to belong to certain regions. **View all Branches** option in the **Security** tab must not be selected to use this option. **Add:** Allows you to add new regions. **Edit:** Allows you to edit existing Region(s): • Region name • Branches in region - add/remove **Delete:** Allows you to delete Regions.

Appendix B

TRISM Monitor Service

B.1 Introduction

The TRISM Monitor Service is designed to be the “heartbeat” of the HID service modules. This service sends notification emails when TRISM modules, such as HSM cores or interface services, become unresponsive.

TRISM Monitor monitors the communication between the individual HID Service Modules and the SQL Database. This gives you peace of mind knowing that if a HID-Level service stops working, an email defining the current state of all HID services is delivered.

The logic implemented polls the SQL database every minute for service activity. If there has been no response from any service during a specified time, an email is generated letting the user-specified recipient know that there has been a change to the services status. The monitoring time is configurable to meet each unique environment’s needs via the TRISM Client Interface settings option.

The easy-to-setup email template uses an efficient format, which allows for a quick determination of what monitored services are up and what services may be down. Every time a change in service has been identified by TRISM Monitor, the email content shows the current status of all services, so no guesswork is required.

```
TRISM Module Status:
HID Card Printer Service 4.0 – UP HID Calculation Service – DOWN Core1 – DOWN
Core2 – DOWN
Card Service – DOWN
```

B.2 HID TRISM Monitor service configuration

To configure the HID TRISM Monitor service you will need to know the following information:

- Host address: example – smtp.gmail.com
- Host Port: example - 123
- Password: example – password123456
- Username: example – TrismTestingEmail@gmail.com

B.3 Settings

Installing and starting the service adds several settings in the **Personal icon** > **Configure** > **Interfaces** > **Interface Settings** > **Interface** drop-down menu > **HID TRISM Monitor**:

Interface setting	Description
EmailHostAddress	The hostname or IP address of the server used to send email.
EmailHostPort	The port on which the email server is listening.
Email Password	The password for the email account used to send email.
EnableSSL	Enables Secure Sockets Layer (SSL) connections.
Email Username	The username of the email account used to send email.
SenderName	The sender's name that is displayed in all outgoing email.
SenderAddress	The sender's email address that is displayed in all outgoing email.
Recipients	The recipient's email addresses (separate multiple addresses with commas).
Monitor "Service Name"	Enables monitoring of the selected Service Module.
Monitor "Core 1"	Enables monitoring of the selected HSM Core Module.
AlertAfterMinutesDown	Sets how long to wait before sending an email once an unresponsive service is detected. Default 10 minutes. Minimum value = 1 minute, maximum value = 60.

Revision history

Date	Description	Revision
June 2024	Initial release.	A.0

hidglobal.com

For technical support, please visit: https://support.hidglobal.com

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