ASURE ID®

Exchange

User Manual

ASURE iD®
Exchange

User Manual

Welcome

Welcome to the exciting world of Asure ID! We have worked hard to create an application that brings the most powerful identification and verification technologies to our customers in a friendly, intuitive and easy-to-use manner. We hope that you will find that Asure ID is the perfect match for your needs.

This electronic manual covers all of the features and functions of Asure ID, and is intended to serve as a reference when working with the software. We recommend that all new users begin with the **Installation Guide** and then the **Asure ID Quick Start Guide** portions of this manual. These chapters will help you to become familiar with the Asure ID concept, and will guide you through examples of the most common tasks. After you have read through these chapters, you will find more detailed information on the various features and functions in the '**Details**' sections in later chapters of this manual.

Asure ID has been designed with ease-of-use as a primary objective, and we feel that many users will want to learn by 'exploring' the software instead of reading a large manual. We encourage this approach, and this is one of the reasons that this manual was designed with a **Quick Start** guide preceding the detailed explanations of each function.

We hope that the **Quick Start** guide will give you a familiar enough understanding of the way our software works so that you can treat the rest of the manual as a detailed reference, ready to consult whenever you need further information about a specific feature.

Quick Start Guide - Installation

Thank You For Purchasing Asure ID…
Let's Get Started!

This easy to use QuickStart Guide provides you with all the information you will need to quickly get the Asure ID software working for you. This guide is divided into the following four sections:

1. Installing Asure ID
2. Registering Your Purchase
3. A Step-By-Step Tutorial
    - Adding Users And Defining Privileges
    - Designing A Card Template
    - Creating A Cardholder Record
    - Printing A Card
4. Using An Asure ID Card Service Bureau For Back-Up Or Primary Card Printing
5. Getting started with the Live Link feature (For Asure ID Exchange users)

Full Asure ID online and offline product documentation can be obtained from within the application by clicking on the 'Help Menu' or by clicking on the 'Help' button at the top of each of the 'Admin Center', 'Card Design Center' and 'Data Entry Center' modules of Asure ID.

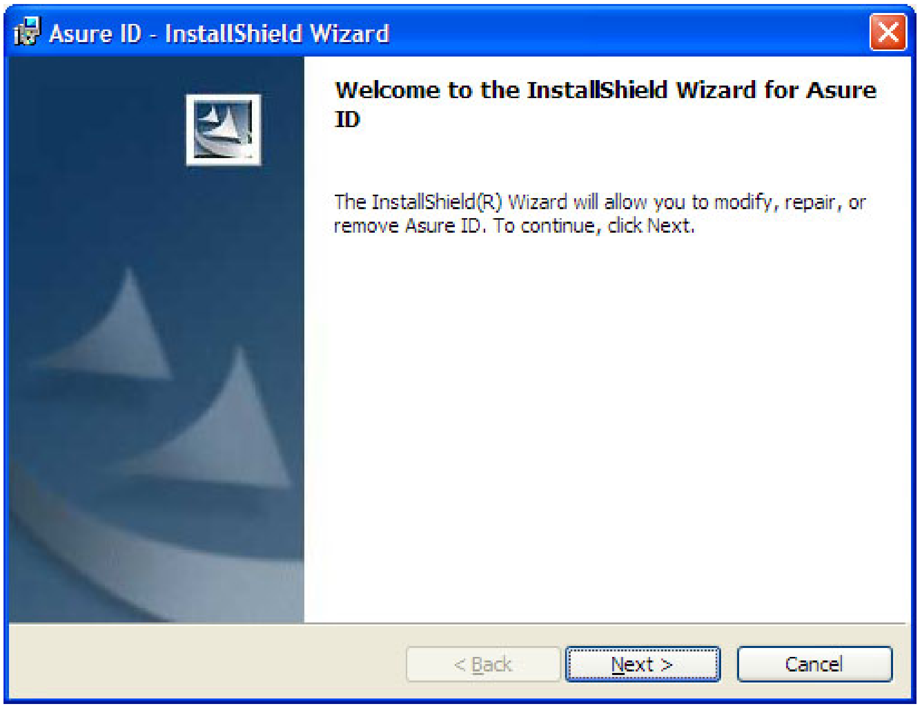
Installing Asure ID

Before you begin the installation, please ensure that your computer meets the minimum system requirements for Asure ID. System requirements are printed on the case that your software came in.

Please note that you will need to be logged onto your computer with Administrative rights in order to install Asure ID successfully. If you are the only person who uses your computer, by default you probably already have administrative rights on your machine. If you need to have a network administrator come to your machine in order to install software or to make changes to your system, you probably do not have administrative rights. If you are unsure about having these rights, please contact your network administration staff, or Asure ID's Customer Support Team.

Step 1

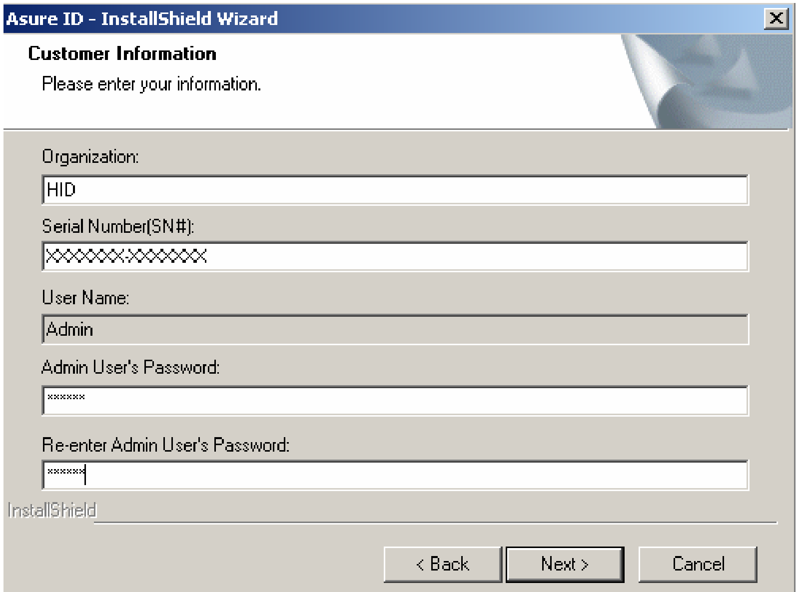
To begin the Asure ID setup, simply place the Asure ID CD into your computer's CD-ROM drive. Within a few moments the install wizard will begin and welcome you to the installation of Asure ID. If you have CD Autoplay disabled, simply browse to the CD-ROM and launch "setup.exe".



After selecting "Next", the software license agreement will appear. Select the "I accept the terms in the license agreement" button, and press next to continue, or select "Cancel" if you would like to exit the installer.

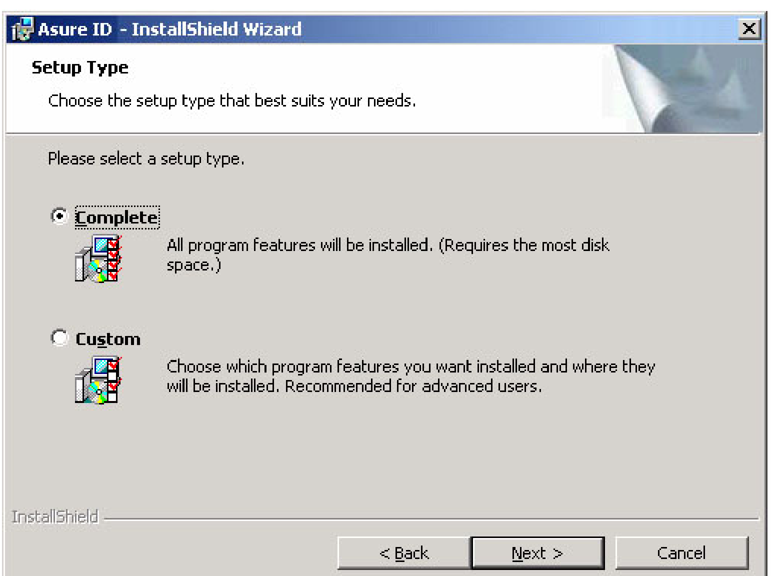
Step 2

Next, the customer information page will appear. Enter your company name, product serial number (as printed on your CD case), and the password for the Asure ID 'Admin' user login. Enter the password again to confirm your choice. Please choose a password that you will remember, as you will need it to login to Asure ID after the install has completed.



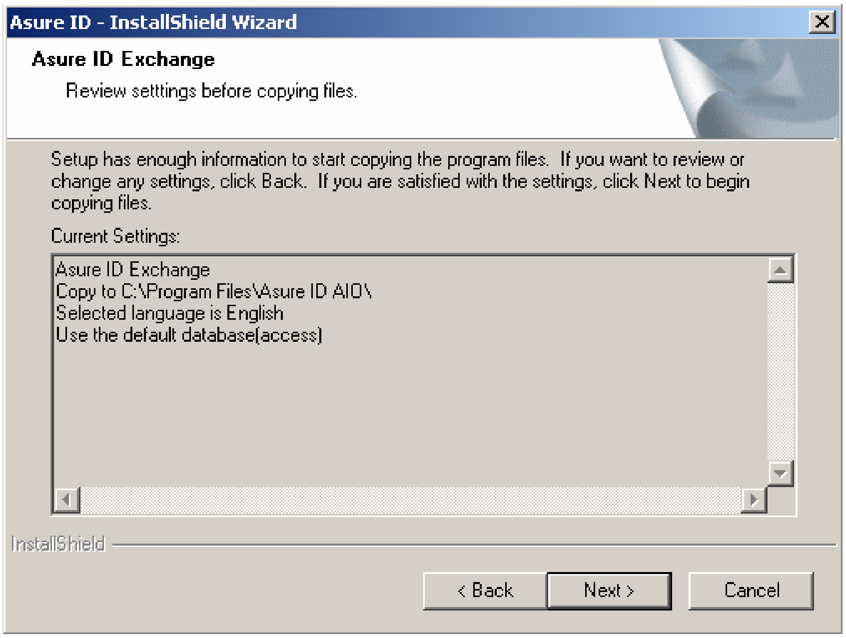
Step 3

Next, the "Setup Type" page will appear, and you may choose either a "Complete" or a "Custom" installation. Select Complete Installation if you would like the software automatically installed with all of the default options, or select Custom Installation if you would like to choose the installation path, language and database configuration.



Step 4

If a Custom Installation has been selected, you will see the installation options on the following page.



If multiple languages are available on your installation CD, you may choose from the available options. If you would like to change the installation path, press the "Change" button where the current install path is shown, and select the new location where you would like Asure ID installed.

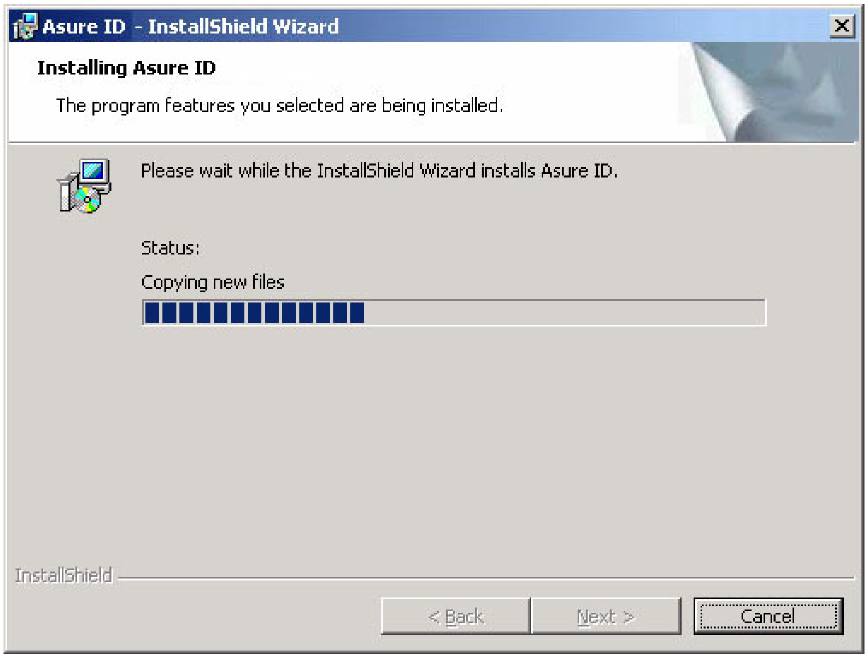
Custom Database Options – "Data Source Configuration" section

Select either "Use default Asure ID database", or "Use custom database configuration". Choose "Use default Asure ID database" to create a new Microsoft Access database for Asure ID Exchange. If a custom database is selected, it will be configured after the installation is complete and the computer rebooted.

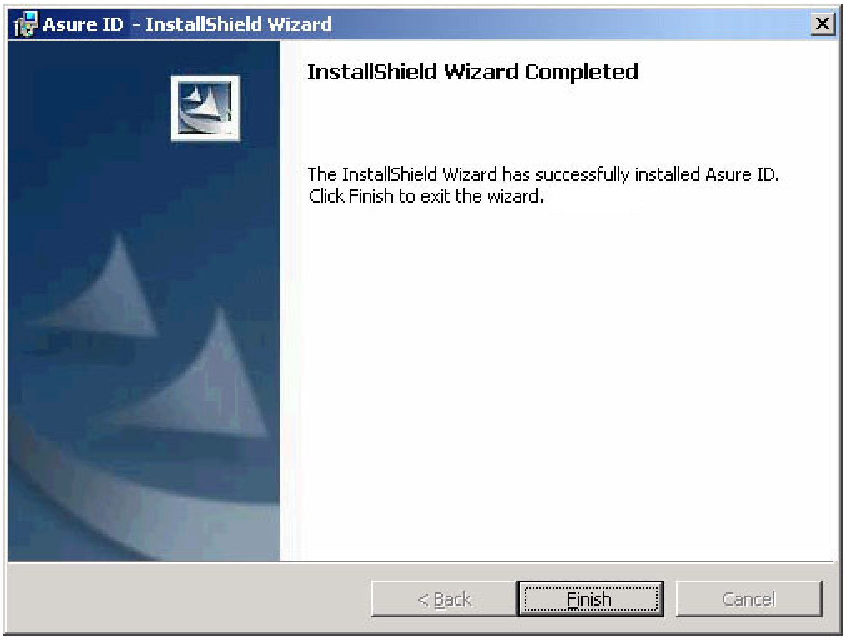
When you have made the appropriate custom installation options, press the "Next" button to continue.

Step 5

After selecting your installation settings, the installer will present a page stating that it is ready to begin the install. Press “Next” to begin the installation or, “Cancel” to halt it and return to Windows without installing Asure ID. When the installation begins you will see a progress window as files are copied to your computer.



When the install has completed successfully, you will see an “InstallShield Wizard Completed” window, as shown below. Press “Finish” to exit the installer.



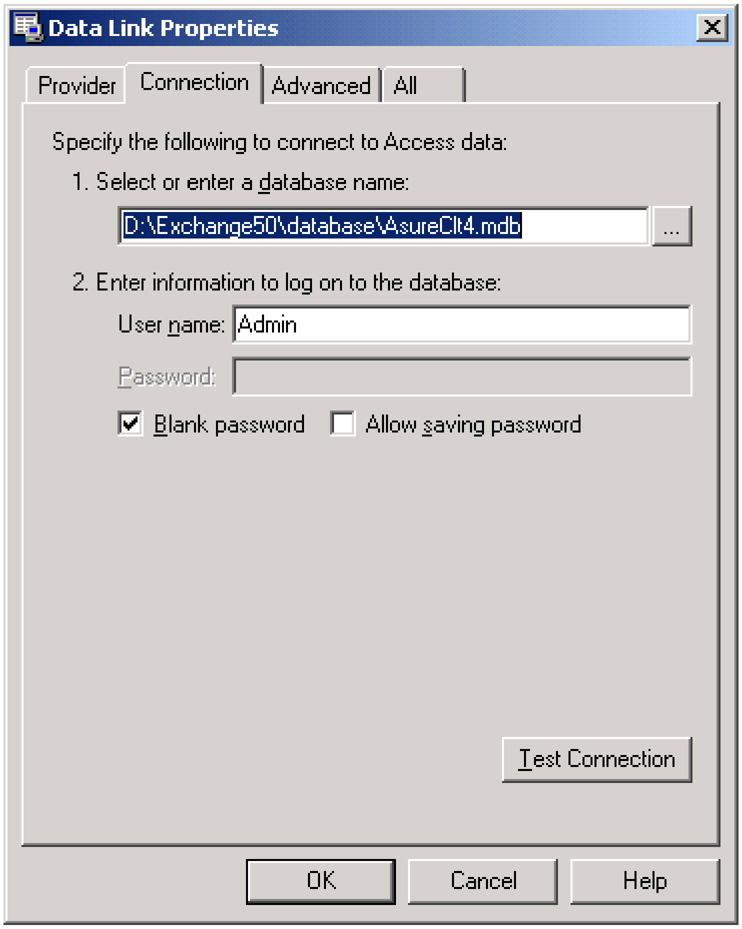
Step 6

Depending on your system and the install type you selected, you may be informed that you need to reboot your computer before the installation will be complete, as displayed below. If you see this message, you must reboot your computer before you can use Asure ID. Press "Yes" if you want to automatically reboot immediately, or "No" if you will reboot the computer yourself at a later time. If you do not see this message, you may launch Asure ID immediately, using the shortcuts that have been placed on the Windows Start Menu, in the "Programs -> HID -> Asure ID…" folder.

Step 7

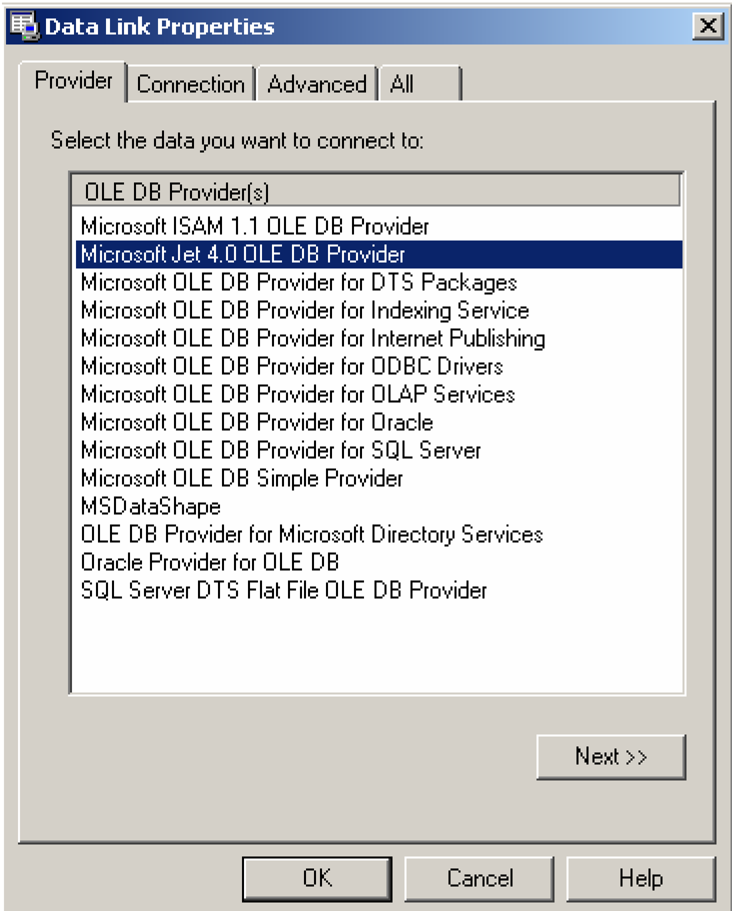
For users who chose a "Custom Data Source Configuration" in the installation options, the Data Link Properties page (shown below) will appear after you reboot the computer.

If you would like to use Asure ID's standard Microsoft Access database, simply press the "OK" button to accept the default settings, and the window will close with Asure ID now ready to use.

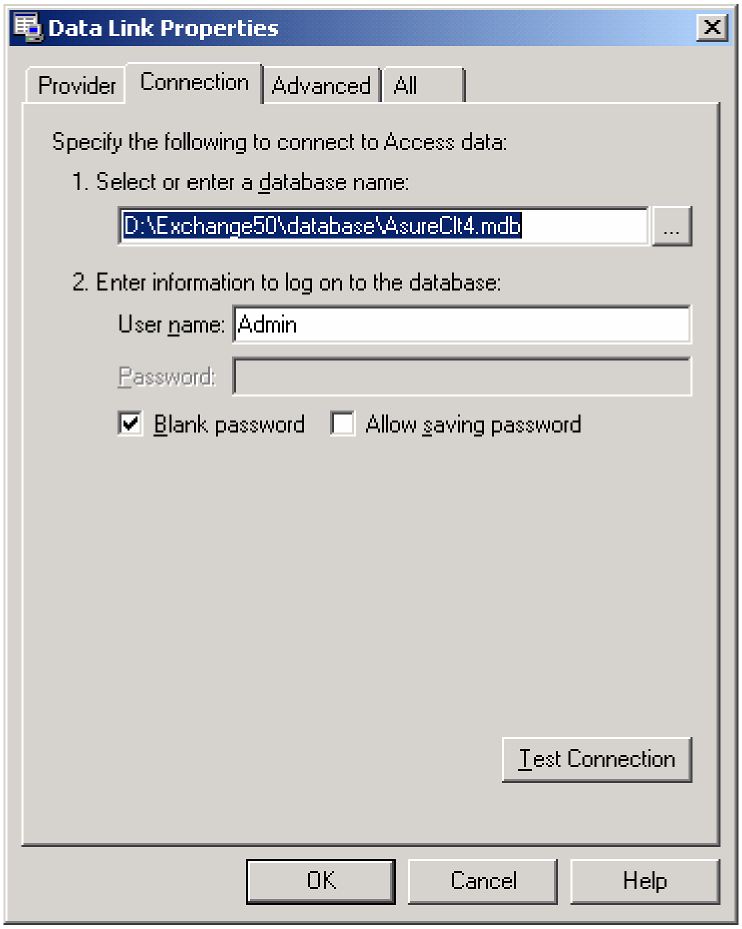


If you would like to use a different database, select the “Provider” tab at the top of the window, and select the appropriate data source driver from the list provided.

The entries listed under “OLE DB Provider(s)” are all the ADO data source types that are registered with your computer. For example, if you would like to use an existing ODBC source, select “Microsoft OLE DB Provider for ODBC Drivers”. If you would like to use SQL Server, select “Microsoft OLE DB Provider for SQL Server”. For a Microsoft Access database, select “Microsoft Jet 4.0 OLE DB Provider”. After making the appropriate selection, press the “Next” button to continue.



After selecting the appropriate data source, press “Next” to setup the database instance (path or source name, depending on selected driver), authentication information, etc. For SQL Server, you will need to enter the name of the Server (hostname or IP address), as well as the username and password for the ‘sa’ (or equivalent) account. The options presented on this page will differ depending on the data source driver selected. For example, if the ODBC driver has been selected, under “Database Name” there will be a drop-down menu showing all available ODBC connections. If you have chosen the Microsoft Jet driver, there will be a “Browse” button that can be used to select an existing Microsoft Access database.



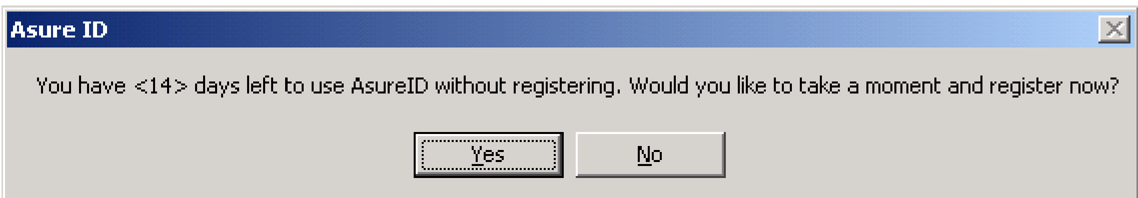
When you have made the appropriate database and authentication settings, press the “Test Connection” button to test the settings. If you see a message stating that the database connectivity tests were successful, you have made the correct settings, and can press “OK” to save the database configuration and close the window – Asure ID is now ready to use. If the database connectivity test fails, you will need to check the settings and ensure that you have configured the database correctly. The “Advanced” and “All Fields” tabs of the window may be used to access all configuration options specific to the selected Data Source, and may be used by system administrators and advanced users to troubleshoot connection problems resulting from the choices made on the standard options presented by this window.

When you press “OK”, a new Asure ID database structure of tables, fields and data will be created within the chosen database. If an Asure ID structure already exists in the chosen database, no changes will be made to the data set, and your installation will be configured to work with this existing database instance. In this case, the Admin user password that you entered into the Install Wizard will not be saved to the database – instead you will need to login using the previously existing Asure ID Admin account, or be given a different (existing) account to by the Asure ID system administrator.

After configuring the custom database, testing the connection, and pressing “OK”, you have completed the installation process and will now be able to run Asure ID by using the shortcuts that have been placed on the Windows Start Menu, in the “Programs -> HID -> Asure ID” folder.

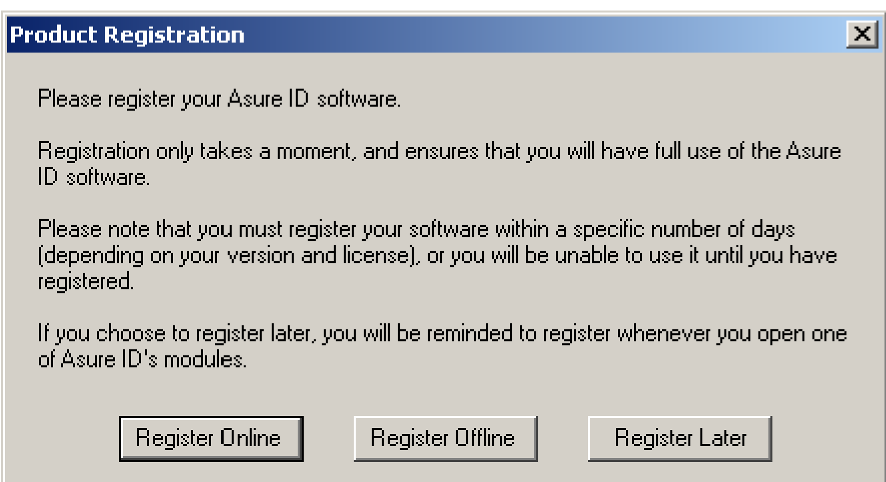
Registering Your Purchase

When you launch Asure ID, you will be asked to register the software. You will be able to use the software for a fixed number of days (depending on the version of the product) before registering, after which time you must register before you can use the product again.



If you would like to register at this time, select “Yes”, and if you would like to register at a later time, select “No”.

When you choose to register the software, you will be given the option to register online, register offline, or register later. If you select register later, the product registration options will close, and you may still use Asure ID within the time limit before you need to register.



Register Online

Select "Register Online" if you would like to use the built-in product activation. This is the standard registration procedure that is recommended for the majority of users who are connected to the Internet.

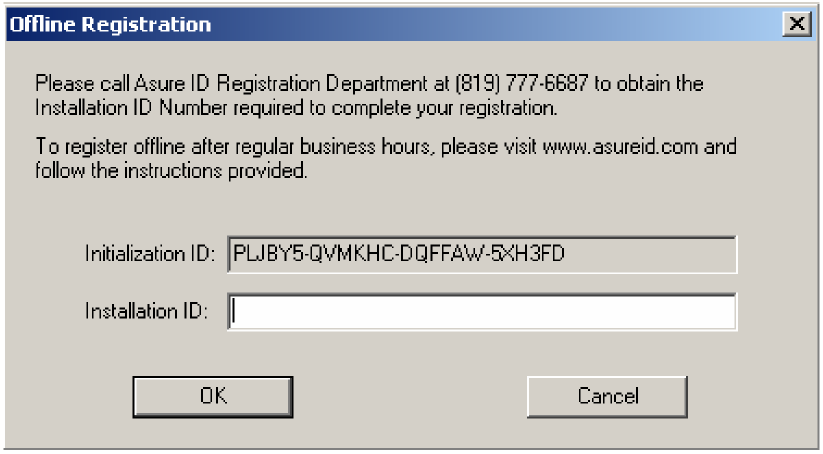
After selecting "Register Online", you will see a customer information page. Please fill out the different items and press "Next" to continue – as long as your computer has web access, you should be registered automatically.

If the Online Registration program is unable to communicate with the registration servers, you will see a communication error message. Please check your Internet connection, disable any firewalls if needed (just for the duration of the registration) and press the "Try Again" button. If the communication failure persists, press "Cancel" and use "Register Offline" instead.

If the product license has already been registered multiple times, you will see a message stating that the product cannot be automatically activated. Exit the Online Registration application, and select "Register Offline" when next prompted to register.

Register Offline

If you select "Register Offline" for the registration option, you will see the Offline Registration window. Please phone the number shown on the window, and select the option for Asure ID Product Registration. You will have to read the number displayed in the "Initialization ID" column to the operator, who will issue you a corresponding number to enter into the "Installation ID" column. This number pair is unique to your current installation, and cannot be used again, even if the same product is reinstalled onto the same computer. After you enter the number issued by the operator, press "OK" to save your registration data. The window will close and you may now run Asure ID using the shortcuts that have been placed on the Windows Start Menu, in the "Programs -> HID -> Asure ID…" folder.



Web Registration

If you are unable to register your software using Online Registration, and are calling to register offline outside of business hours, you may use the “Register Offline” function in conjunction with any computer that has Internet access, even if it is not the same computer you are installing Asure ID onto. Please select “Register Offline” when prompted by Asure ID, and then using any computer, go to our web-based registration page located at:
http://www.AsureID.com/support/registration.asp

You will need to fill out the form on the webpage, and enter the Initialization ID (displayed when you select “Register Offline” in the Asure ID software) into the appropriate box on the web form. When you have filled out all of the requested items, press the “Submit” button at the bottom of the page, and our servers will process your registration request. If the registration is successful, you will be presented with an “Installation ID” that you can type into the appropriate box in Asure ID’s Offline Register window.

Please note that this web-based registration will not re-activate products that have been registered multiple times and thus cannot be activated by the standard “Register Online” function. If you cannot register your product because it has already been activated, please call Asure ID’s product registration team on the phone number that is displayed on the “Register Offline” window.

Launching Asure ID

After Asure ID has been installed, you may login to either the Admin Center, or the Card Design Center. The Data Enter Center module cannot be used until at least one card design has been created or imported into Card Design Center and then saved to the database.

When you login to any of Asure ID’s modules, you will be presented with a login box.

After a new installation, the only User Name available is "Admin", as displayed when setting up the installation of Asure ID and described above. Other User Names can be created in the Admin Center module. To login, enter "Admin" (without the quote marks) in the "User Name" box, enter the password that you created when setting up the installation into the "Password" box, and then press "OK" to login to Asure ID.

Quick Start Guide - A Step-By-Step Tutorial

Adding Users Accounts

The Admin Center of Asure ID is where accounts for additional Asure ID users can be created and privileges assigned.

Step 1

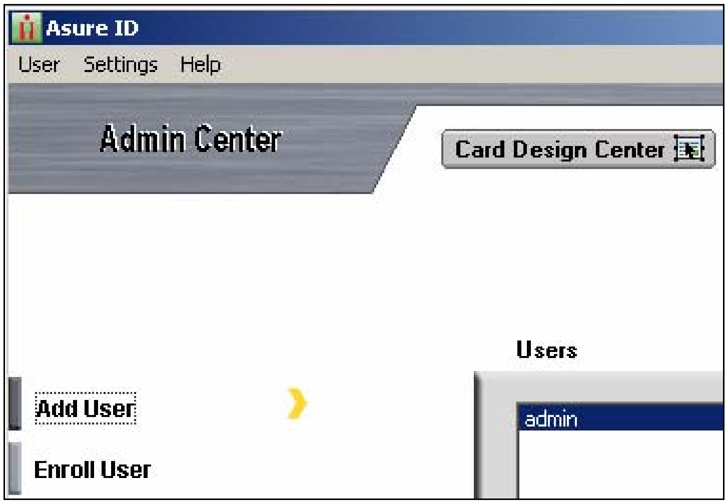
Launch the Admin Center application by selecting the Admin Center shortcut located on your Start Menu under Programs\HID\Asure ID…\Admin Center.

Step 2

You will be prompted to enter a user name and password - type 'Admin' (without the quotation marks) and the password that you created during the setup routine process, and press "OK".

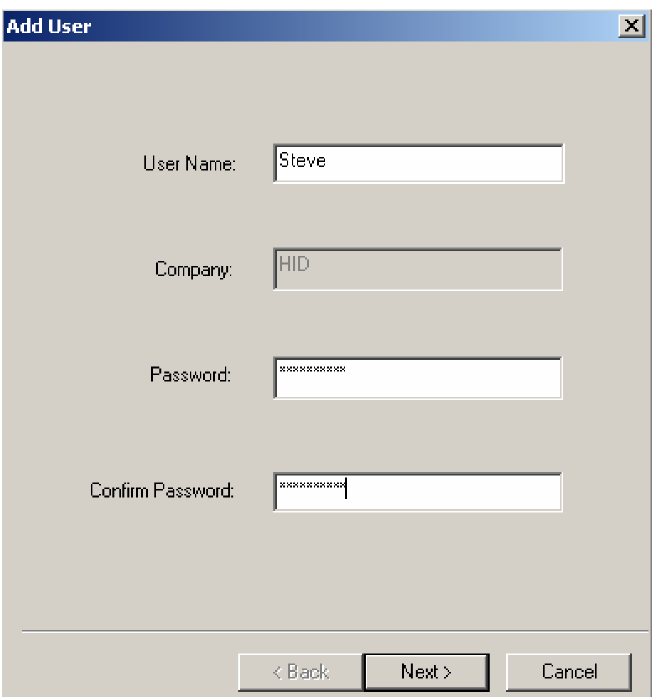
Step 3

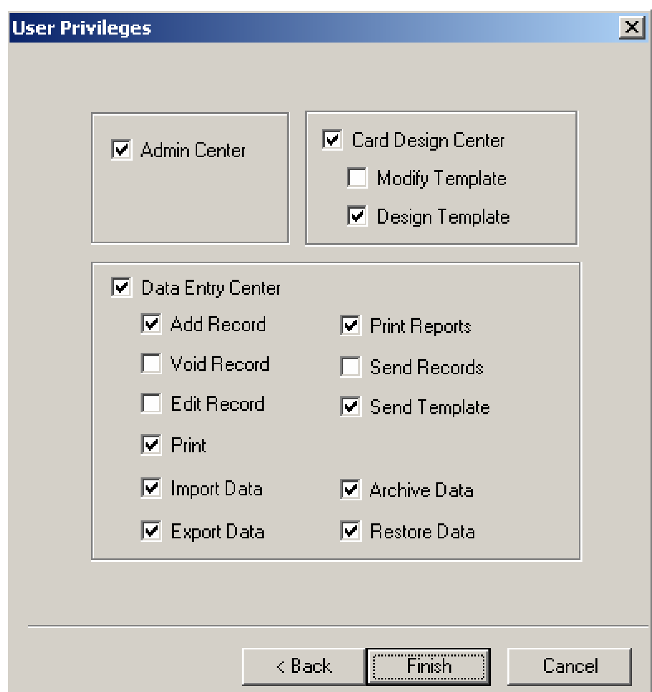
To add a new user, press the 'Add User' button on the left side of the screen.



Step 4

In the ‘User Properties’ dialog box, enter the user name and password, and then press the ‘Next’ button. An option window entitled ‘User Privileges’, shown below, will appear next. Here you can select which functions of Asure ID your new user will have access to. Select the options you want to allow by checking the various items, and press ‘OK’ when you are finished. Remember that you can always change or update options in a user’s profile at a later date.





That's all there is to creating new users and assigning permissions. To modify a currently existing user, simply select their name from the 'User List' displayed in the Admin Center's main window, and press the 'Update User' button. You will see the same 'User Properties' and 'User Privileges' windows as shown above. Simply change the options you want and then press 'OK'. Deleting a user is just as easy. Select the user's name you want to delete from the 'User List', and press the 'Delete User' button.

Designing a Card Template

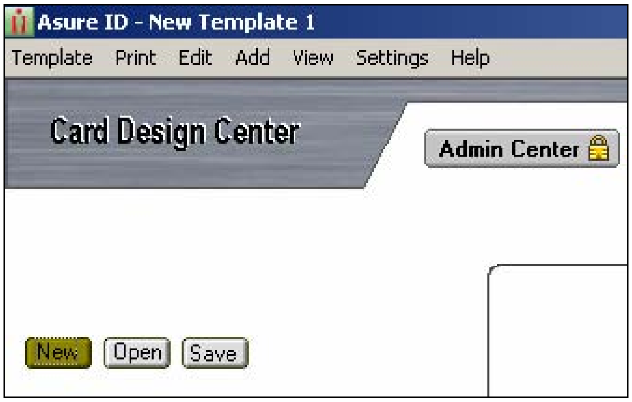
The Card Design Center is where you create templates for cards, either from scratch or by modifying existing templates. It is here that you decide what your cards will look like, what types of text and data they will hold and display, and what types of special features (such as barcodes, magnetic stripes or chips) they will incorporate. This is all done through a simple drag-and-drop visual interface, while Asure ID takes care of creating a custom database for you 'behind the scenes'. The best part is that no database programming knowledge or skills is needed. To fully appreciate the powerful features of the Card Design Center, take a look at the simple steps involved with creating a new card template.

Step 5

You are already in the Asure ID Admin Center, so press the 'Card Design Center' button at the top of the screen (you will of course need to have Card Design Center privileges assigned in your user profile).

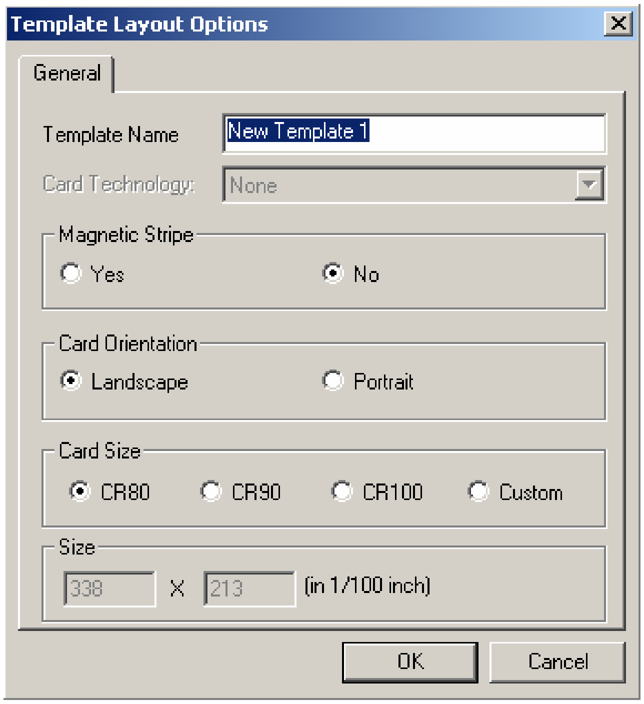
Step 6

To create a new card template, press the 'New' button on the upper left of the main window.



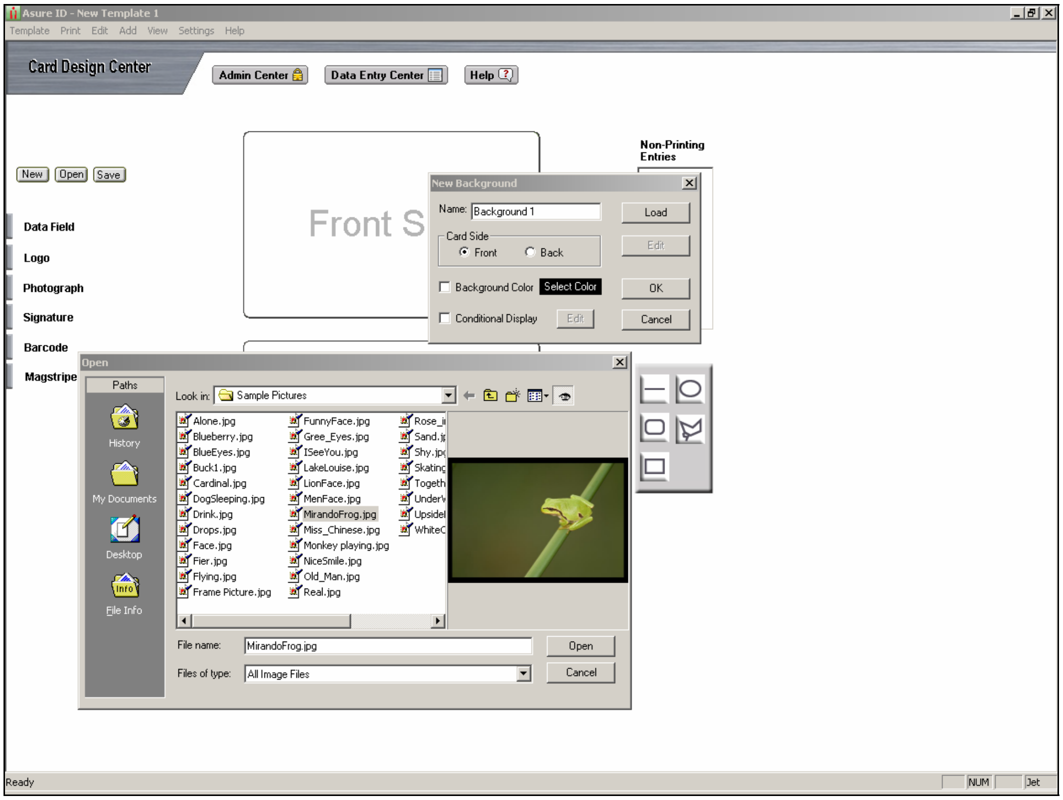
Step 7

After pressing the 'New' button, a 'Template Layout Options' window will appear asking you to specify the 'Template Name' (We've used 'Employee Card' for our example), as well as other basic details about the physical structure of the card that is going to be used, such as 'Card Technology' (smart chips and contactless cards), 'Orientation' and 'Card Size'. These are fundamental aspects of the card's appearance and structure, and must be selected before the layout of the new card can be displayed. For this tutorial, select 'CR80' (credit card size - by far the most common card size in use today) for 'Card Type' and select 'Portrait' for the 'Orientation'. Leave 'Magnetic Stripe' to 'No', and 'Card Technology' set to 'None'.



Step 8

After you select the basic properties, a new blank template appears within the workspace. Now you should select a background image or a color for the front of your card. Double-clicking on the white area of the front of the card allows you to add a background. A 'New Background' dialog box will appear, giving you the option to browse your computer and network for a background image, or to select a custom color from the Windows color palette. To add a background image click on the 'Load' button and an 'Open' dialog box will appear, allowing you to choose an image. When you have located the image that you would like to use, press the 'Open' button.



Step 9

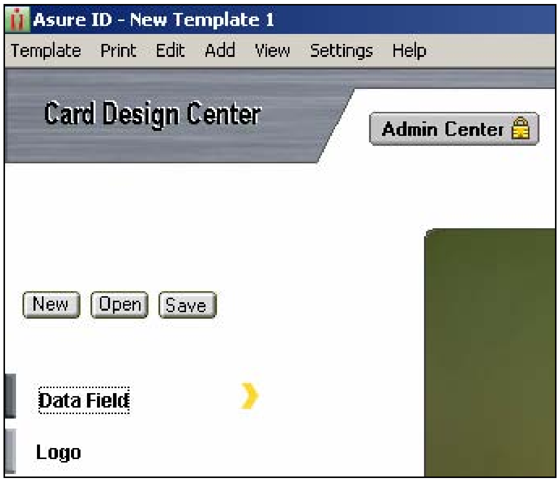
Edit the image by clicking on the 'Edit' button. An 'Edit Image' window will appear giving you the option to crop (selecting the area of image to be used) the image. To crop the image, simply resize the crop selection frame over the portion of the image you wish to use as the background. When you are satisfied with your selection click 'OK', and then 'OK' again to close the 'New Background' dialog box, and load your image onto the card area.

Repeat steps 8 and 9 to choose a background color or image for the back of the card if required. You can change the background appearance at any time within the Card Design Center simply by double-clicking on the background and following the steps described above.

A look at the Card Design Center's main button panel (on the left side of the screen) shows buttons for 'Data Field', 'Logo', 'Photograph', 'Signature', 'Barcode', 'Magstripe' and 'Chip'. Although there are a wide variety of options, they are all added to the card in the same simple fashion. Simply press the button of the item that you want to add, and then click within the card area to place the selected item.

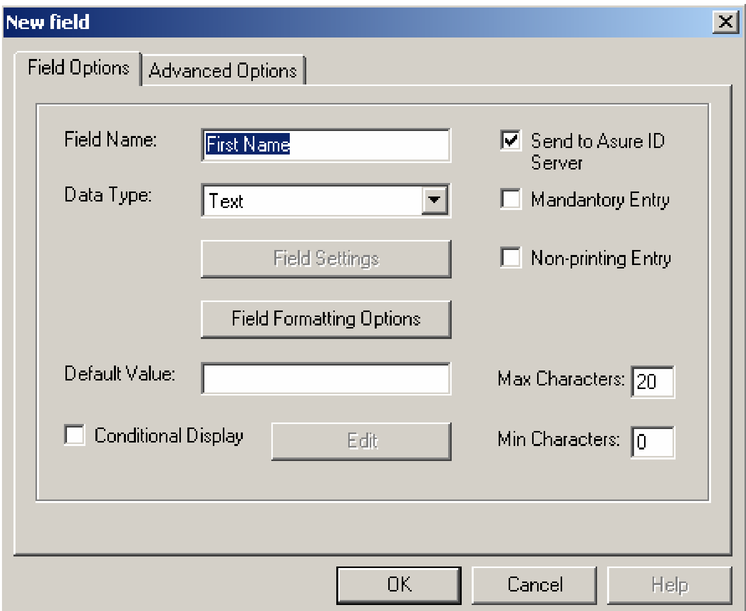
Step 10

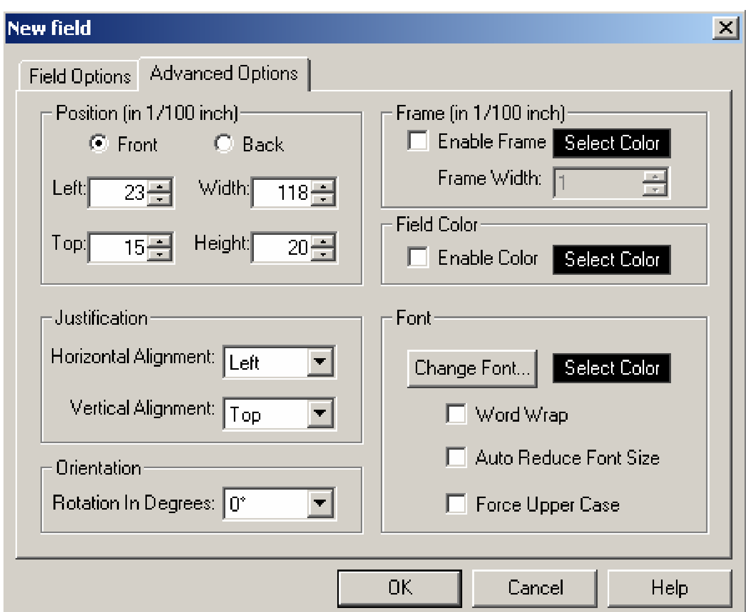
We will next add a 'First Name' field to your card. Begin by simply pressing the 'Data Field' button on the left hand side of the screen and clicking on the area of the card where you would like the field to appear.



Step 11

Within the ‘New Field’ dialog box that appears you will see a field titled ‘Field Name’. In this area, type the field name; in this case we will use ‘First Name’. Browse through the rest of the fields on both the ‘General’ and ‘Advanced’ tabs and try to replicate the options shown in the picture below. When you are satisfied with your field choices click ‘OK’.



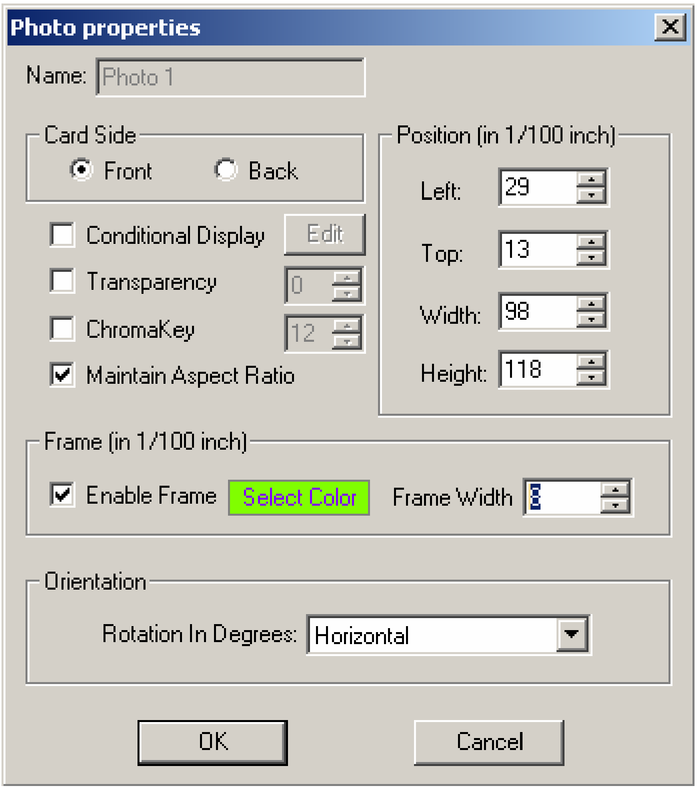


Step 12

Add another data field and repeat the steps in steps 10 and 11. This time, instead of ‘First Name’, type ‘Last Name’ into the ‘Field Name’ area.

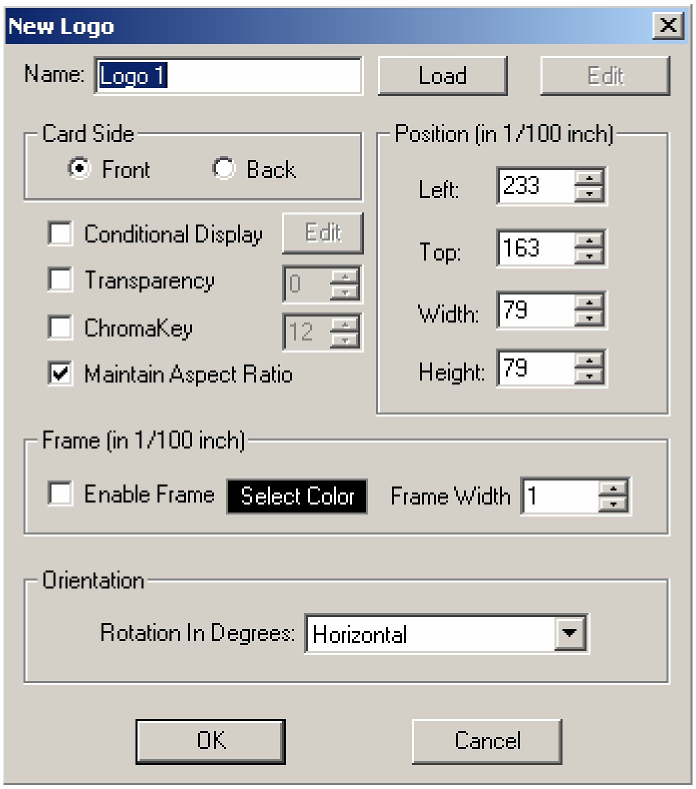
Step 13

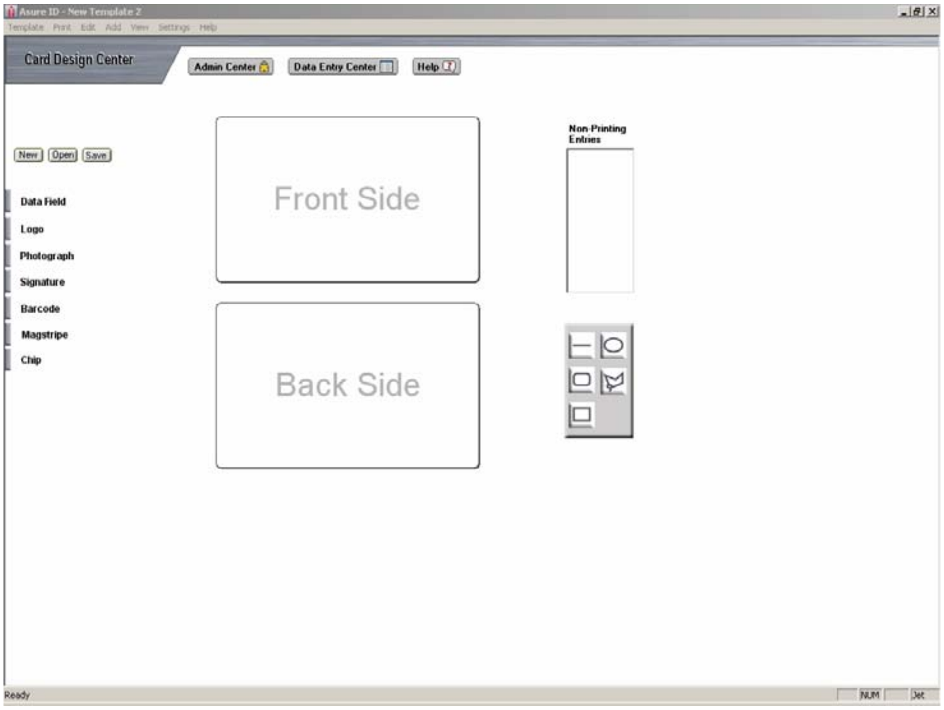
Add a field for a photograph by pressing the ‘Photograph’ button on the left hand side of the screen and positioning the cursor on the front side of the card, and clicking the left mouse button. Name the new photograph field ‘Employee’ and enable a frame by selecting the box next to the words ‘Enable Frame’, and set the ‘Frame Width’ to ‘8’. When you have completed your selections, click ‘OK’.



Step 14

To finish our card template, add a logo image to the front of the card by clicking on the ‘Logo’ button, positioning the cursor on the front side of the card and clicking the left mouse button. From within the ‘Logo’ dialog box that appears, press the ‘Load’ button to locate and load an image in the same way that you selected the background image for the card. If you would like to crop or edit the image (again, in the same manner as with the background image), press the ‘Edit’ button to open the image editor. Select any other desired options such as a frame, and then press ‘OK’ when you are satisfied with the settings. You will see the logo appear on the card, and you may resize it by clicking on any of the image’s corners and dragging the edge of the logo. Like any other field on the card, clicking on the center of the image and dragging it to a different location on the card can easily reposition the logo.





Step 15

When finished, save your card template by clicking the ‘Save’ button on the upper left of the main window.

Congratulations! You have just created your very first custom card template!

Creating a Cardholder Record

Data Entry Center is the part of Asure ID that you will use most often. This is where the individual cardholder’s photograph, signature, biometric and personal data can be captured and added to the card template’s database. The Data Entry Center is very simple to use.

Let’s take a look at how the Data Entry Center functions by opening the card template we created in the last section, and then adding a few cards to the database.

Step 16

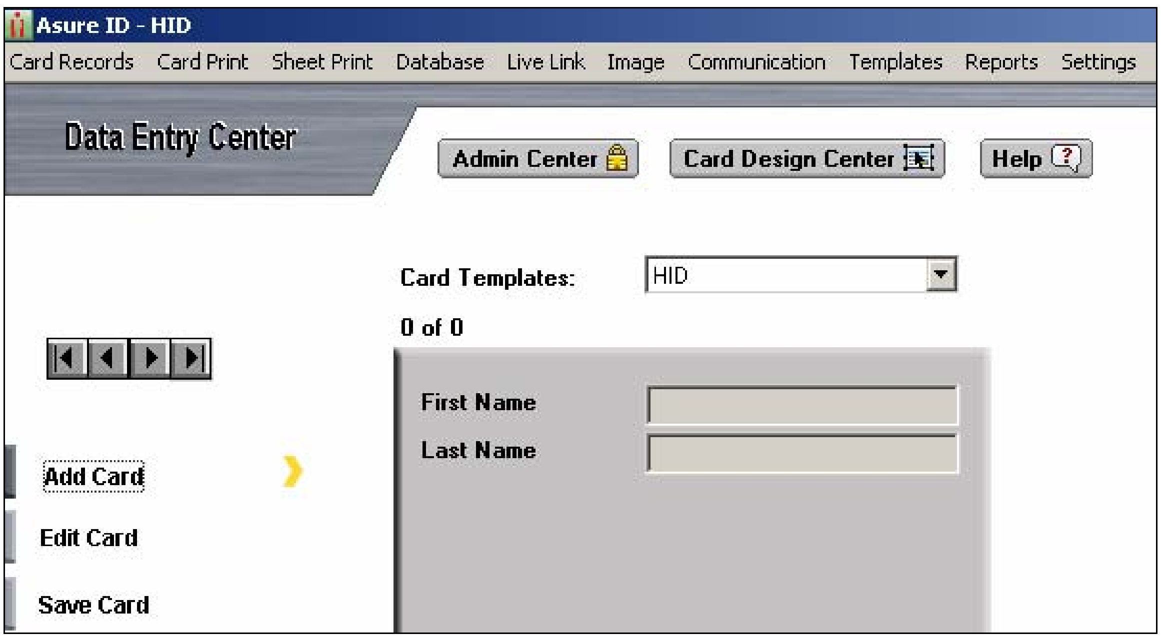
If you are still in the Card Design Center, enter the Data Entry Center by clicking the ‘Data Entry Center’ button at the top of the screen.

Step 17

You first must select the ‘Card Template’ that you want to use. Data Entry Center provides you with any templates that you have created in the Card Design Center. Select the template from the drop-down ‘Card Template’ menu at the top of the Data Entry Center main window.

Step 18

After you have selected the template, click on the ‘Add Card’ button. You will notice that all of the data fields on the card will include an area to enter values into (these fields are grayed out until you press the Add Card button).



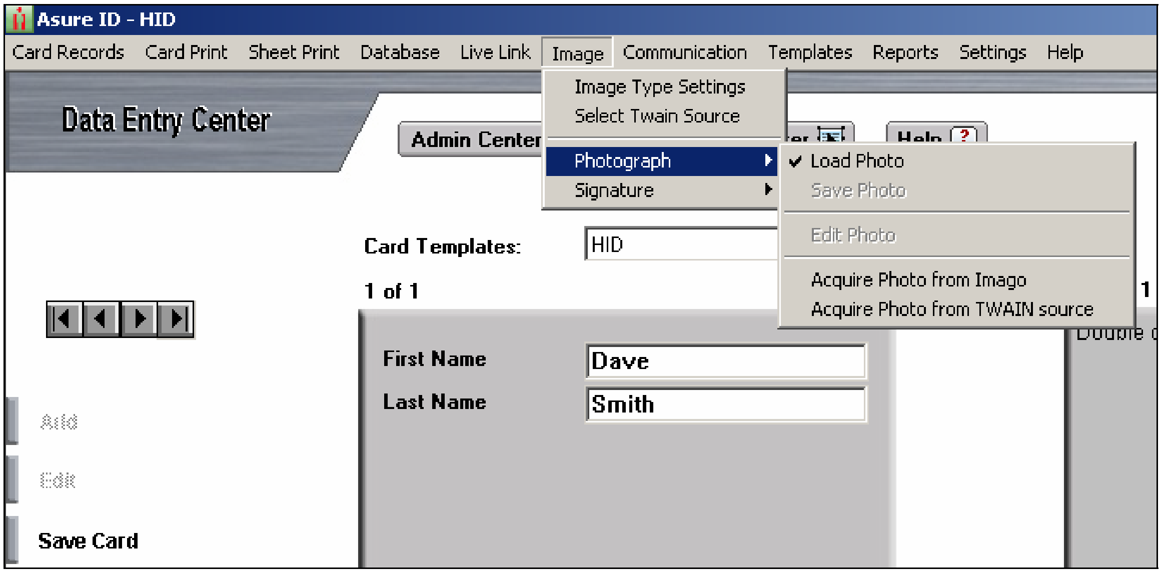
Step 19

Simply click in each field and type in the appropriate data. You may also use the <TAB> key to move from one field to the next.

Step 20

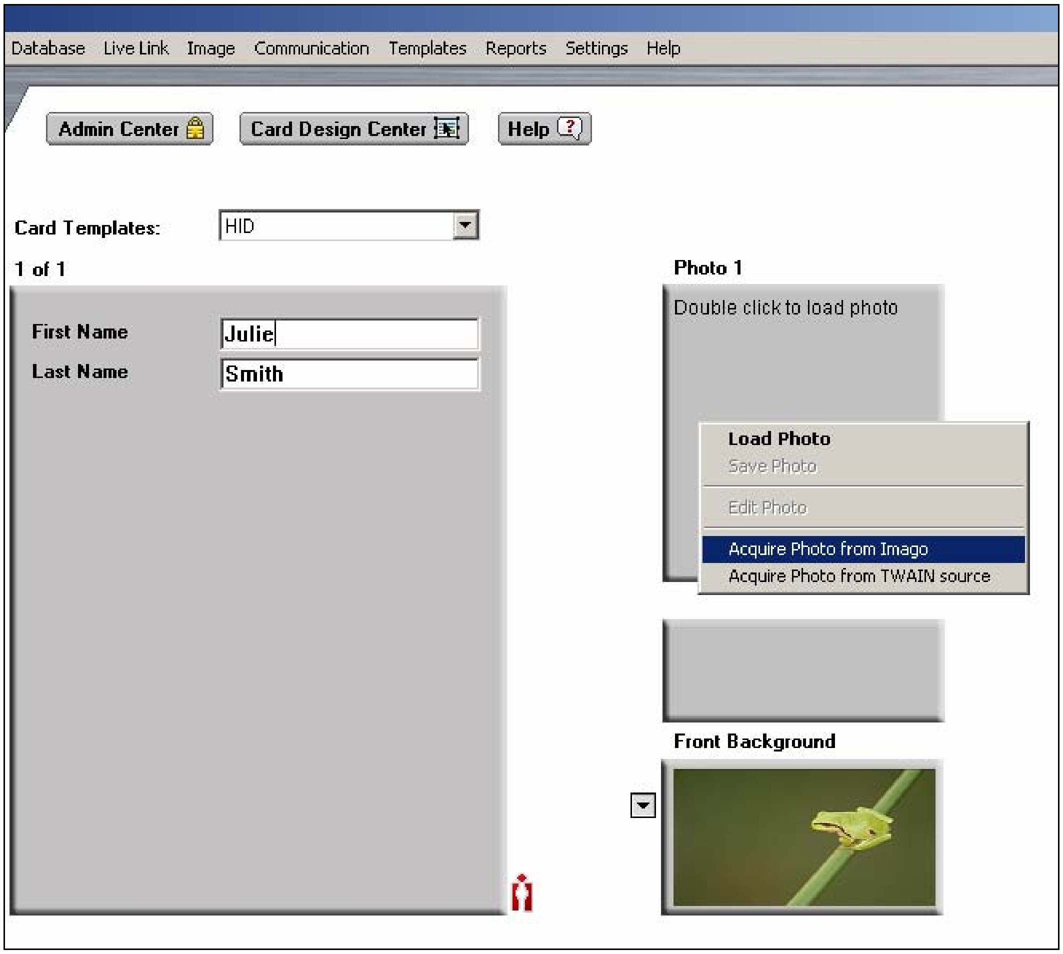
If the cardholder you wish to add is with you and you have an Imago or TWAIN compliant digital camera attached to your computer, click on ‘Image’ on the main menu bar at the top of the screen and select either ‘Photograph’ and then select ‘Acquire Photo from Imago’ or simply choose ‘Select Twain Source’ to configure your TWAIN camera. If you selected ‘Select Twain Source’, from the ‘Select

Source' window that appears highlight the source you would like to set as the default photograph capture device and then press 'Select'. You are only required to configure your TWAIN capture device once unless you wish to change the default device at some point in the future.



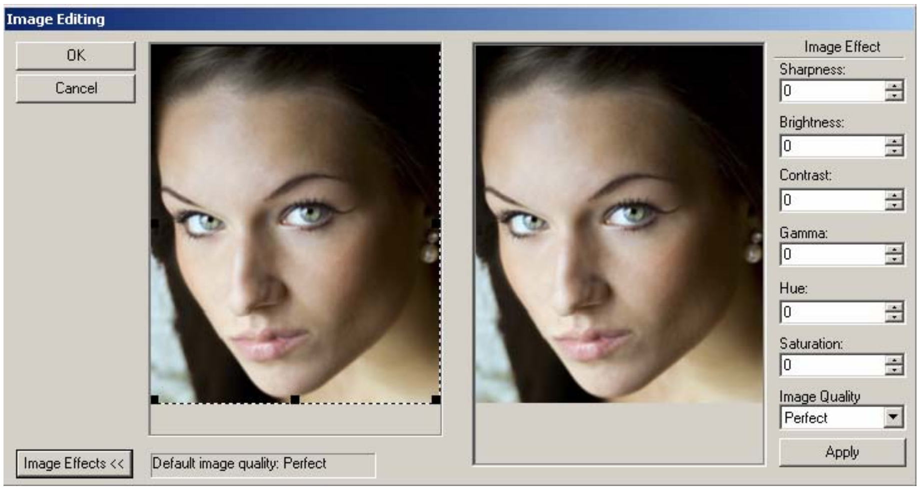
Step 21

Once your camera (or scanner) is configured, right-click the large Photograph area in the upper right corner of the Data Entry Center's window and select 'Acquire Photo from TWAIN Source' to capture the photo of your cardholder.



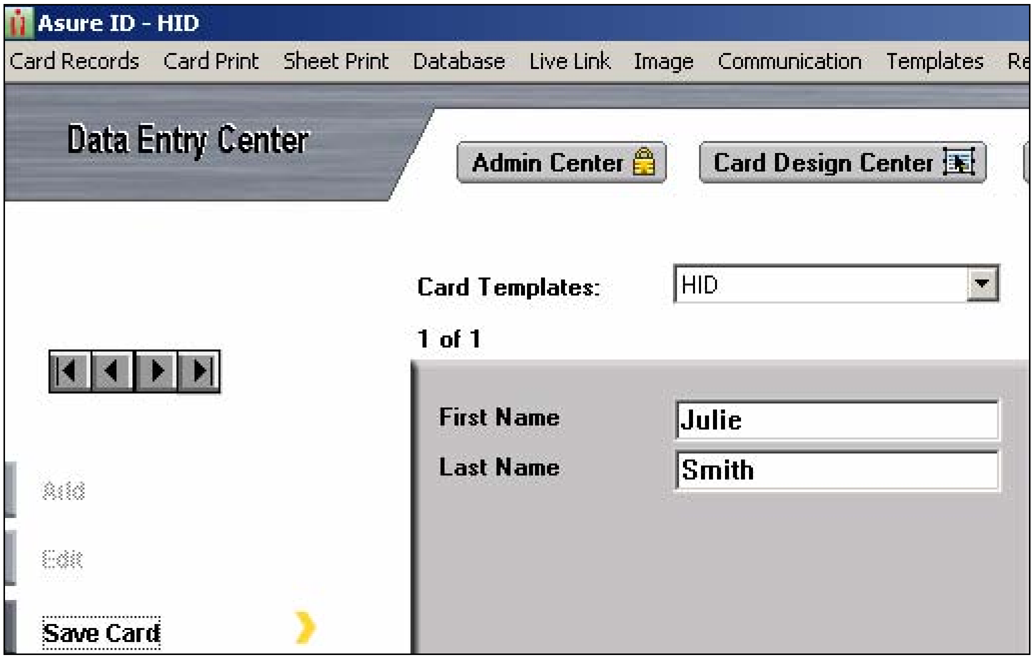
Step 22

After you load (from file) or capture (Asure ID Imago, TWAIN camera or scanner) the photograph, you have the option to edit the image. To crop the image simply right-click on the photograph display, and select 'Edit Photo'. Next, resize the crop selection frame that appears. When you are satisfied with your selection, click 'OK'.



Step 23

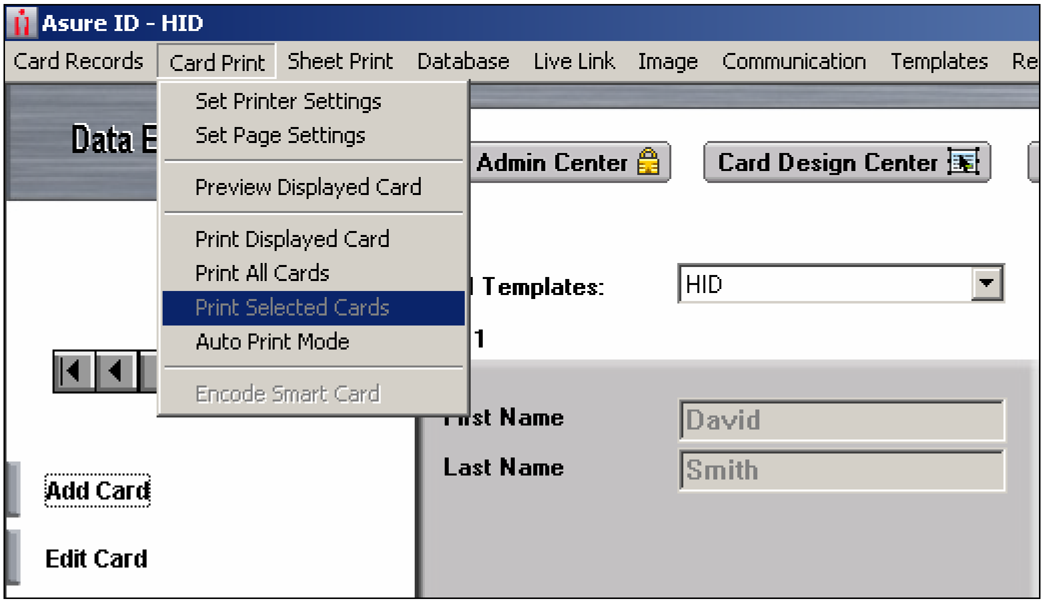
When you have filled the fields on your card template with all the data for the cardholder, press the ‘Save Card’ button to add this record to the database.



Printing a Card

Step 24

You are now ready to print your first card. This can be done in one of two ways. Either by clicking on the ‘Print’ button on the left hand side of the main window, or by selecting ‘Card Print’ from the main menu at the top of the screen. If you choose the ‘Card Print’ menu, you will be given three printing options; ‘Print Displayed Card’, ‘Print All Cards’, or ‘Print Selected Cards’.



Step 25

To end this tutorial let’s take a look at the finished card by selecting ‘Card Print’ from the main drop-down menu, and then choosing ‘Preview Displayed Card’.

Congratulations! You have reached the end of the Asure ID Quick Start guide. Full Asure ID product documentation can be obtained from within the application by clicking on the ‘Help Menu’ or by clicking on the ‘Help’ button at the top of each of the ‘Admin Center’, ‘Card Design Center’ and ‘Data Entry Center’ modules of Asure ID.

Quick Start Guide - Live Link

Introduction

Asure ID Exchange includes the brand new Live Link feature, designed to let users work with existing third party databases instead of the standard Asure ID database.

Some situations where Live Link would prove useful include –

- Any organization that already has their cardholder info stored in an existing database, and wants to work with this existing information instead of re-entering it. This database may have been a custom creation for the organization, or it could have been created by an Access Control or Human Resources software application.

- Any organization that wants to 'share' the cardholder data between multiple different applications, without having to add new records to one application and then manually updating the other one.

- Any organization that wants to use different database types other than the native Asure ID MS Access or MS SQL database.

The Live Link feature is intended for integrators and advanced users with some database experience, and allows for Asure ID to be configured to no longer read and write from its own native database, and instead be directed to an external database to read existing records as well as storing new records.

All Live Link configurations are 'per template', that is, only affect a single template within Asure ID. When a Live Link configuration is established for a given template, other templates will still read and write from Asure ID's default database, unless they have also been given their own Live Link configuration. A user may create as many Live Link configurations as they would like – every template can have its own unique database relationship. In fact, within a given template, multiple Live Link configurations may be created and saved, and the user can switch between them at will. Please note that for a given template, each Live Link configuration represents a unique set of cardholder records. If you save multiple Live Link configurations to a single template, switching between them is similar to switching templates – each configuration will bring up a set of records that is unique to the chosen Live Link configuration and not necessarily related to the data stored in other Live Link configurations.

Finally, when establishing a new Live Link configuration to a given template, no records are discarded from the default Asure ID database, or the other Live Link configurations. Within a given template, a user may have a set of records stored within Asure ID's own database (the 'No Live Link' option), as well as separate and unrelated sets of records stored in external databases and accessed through each saved Live Link configuration. The user may switch between these record sets at will.

This Quick Start guide for Live Link will explain the procedure to establish a new Live Link configuration, and how to work with multiple Live Link settings for a given template.

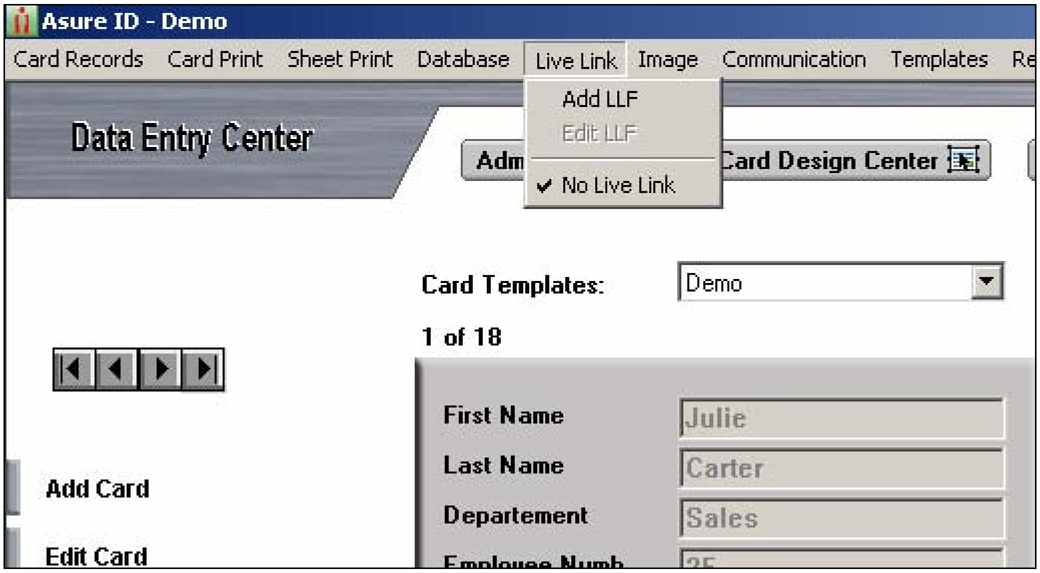
There are two main steps to creating a new Live Link configuration – selecting the database and mapping the template fields. We'll take a closer look at each of these steps as we set up a basic Live Link configuration.

Selecting a Database

To begin setting up a Live Link configuration, launch Data Entry Center, and select the template that you want to build a Live Link configuration for. All new Asure ID templates are by default connected to the native Asure ID database, however after we have created and saved a Live Link configuration, we will be able to switch the template's 'data path' from the native Asure ID database to the external Live Link database(s). Any ADO or ODBC compliant database may be selected, with only two limitations:

- The database must have a 1:1 relationship between entries within its tables
- The database must have a consistent sequential primary key field across all of its tables.

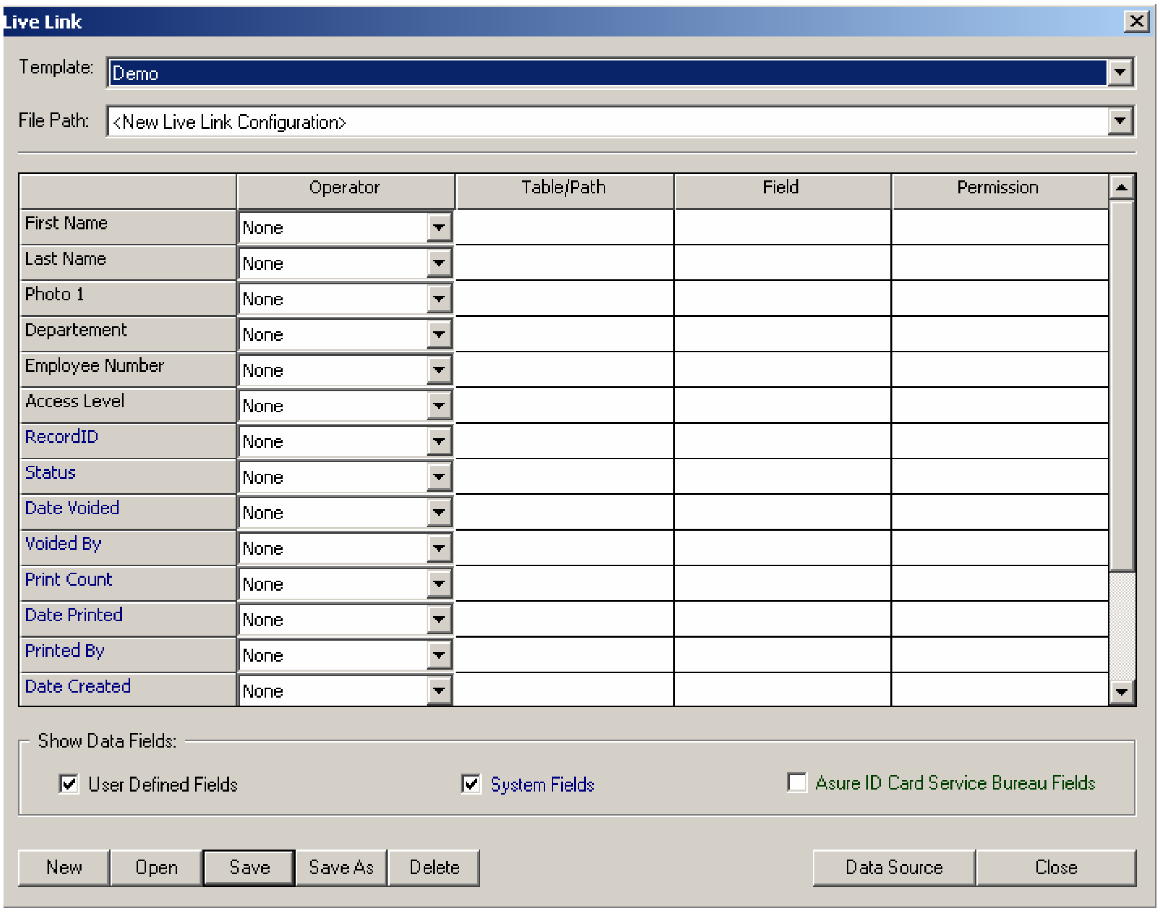
After selecting the template you want to work with, click on the "Live Link" drop down menu at the top of the main Data Entry Center screen.



You will see three items on the menu – Choose “Add LLF” to create a new Live Link File, or “Edit LLF” to modify an existing Live Link File. The “No Live Link” item (which is checked by default when there is no active Live Link File) is used both to denote when there is no active Live Link File, as well as an option that can be selected to ‘switch’ the card record set from an active Live Link File back to the original Asure ID database.

Please note your Asure ID account must have been granted permissions to use the Live Link tool in order to access the items on this menu. If you do not have the appropriate rights, ask your Asure ID administrator to edit your account in Asure ID’s Admin Center so that you will have the appropriate permissions.

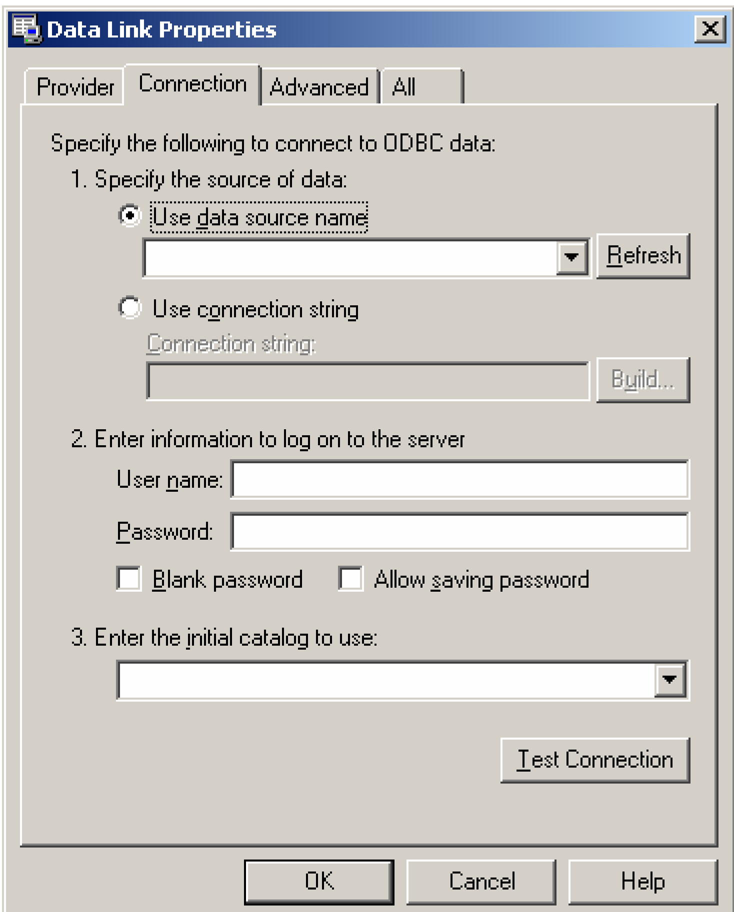
To get started, we will want to add a new Live Link File, so select “Add LFF” from the menu, and the Live Link configuration tool will appear.



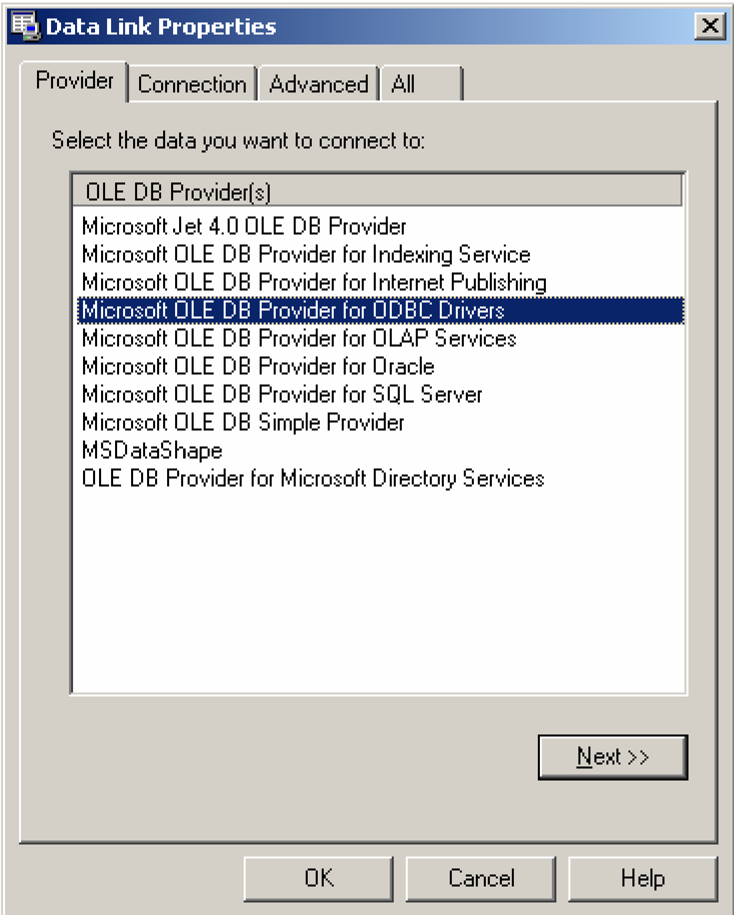
The Live Link configuration tool includes drop-down menus to select the template that the Live Link File will apply to, as well as the path to save the Live Link configuration file to. The main section of the window lists all of the fields that are included with the template, and after configuration, this area will also list the external database mapping that is assigned to each field. There are three check boxes that allow the user to 'mask' certain field types that they may not want to configure with Live Link, and finally there are some buttons at the bottom of the window that are used to load, save, delete and create Live Link Files.

Since we have launched the tool by selecting "Add LLF", we are by default working with a new configuration, so all of the mapping fields are empty. When starting a new Live Link configuration, the first thing that we must do is to select the database we want to work with. Press the "Data Source" button on the lower right of the window to configure the database selection.

A “Data Link Properties” window (shown below) will appear. We will use this window to accomplish two essential tasks – selecting the database, and providing authentication information.



First, we will want to select the type of database we will work with. Select the “Provider” tab at the top of the window, and a list of database drivers will appear listed under “OLE DB Provider(s)”.



The list may be different from one computer to the next, as the entries are all the ADO data source types that are installed and registered with your computer. If there is not an entry for the database type you want to work with, you will need to either install a registered ADO driver from your database vendor, or configure a functioning ODBC connection to the database, and then restart the Live Link configuration tool.

If the database type you wish to link to is displayed, select it and then press the “Next” button on the lower left to continue. If you wish to use an existing ODBC connection to your database instead of a registered ADO driver, select “Microsoft OLE DB Provider for ODBC Drivers”.

SQL Server and MS Access are some of the most commonly used databases. If you would like to use SQL Server, select “Microsoft OLE DB Provider for SQL Server”, or if you wish to use a Microsoft Access database, select “Microsoft Jet 4.0 OLE DB Provider”.

After selecting the appropriate data source, press “Next” to setup the database instance (path or source name, depending on selected driver) and authentication information. The page that appears will be somewhat different depending on the database driver you have selected, and will show options appropriate to that data type.

If you selected a SQL Server driver, you will need to enter the name of the Server (hostname or IP address) in the ‘1’ box, as well entering the username and password for the ‘sa’ (or equivalent) account in the ‘2’ box, and finally use the drop-down menu under the ‘3’ item to select the database instance within the SQL Server that you will link to.

If you have selected the ADO Provider for ODBC Connections, under “Use Data Source Name” there will be a drop-down menu showing all available ODBC connections, and you may select the one that is configured for the database you wish to link to.

If you have chosen the Microsoft Jet driver, there will be a “..” button beside the ‘1’ box that can be used to browse to select an existing Microsoft Access database on your computer or network.

Whatever database driver you have selected, you will need to select the database itself (or Server and database for a SQL Server, as described above), as well as any authentication information that may be required by the database. If your database does not use authentication, check the ‘Blank Password’ box.

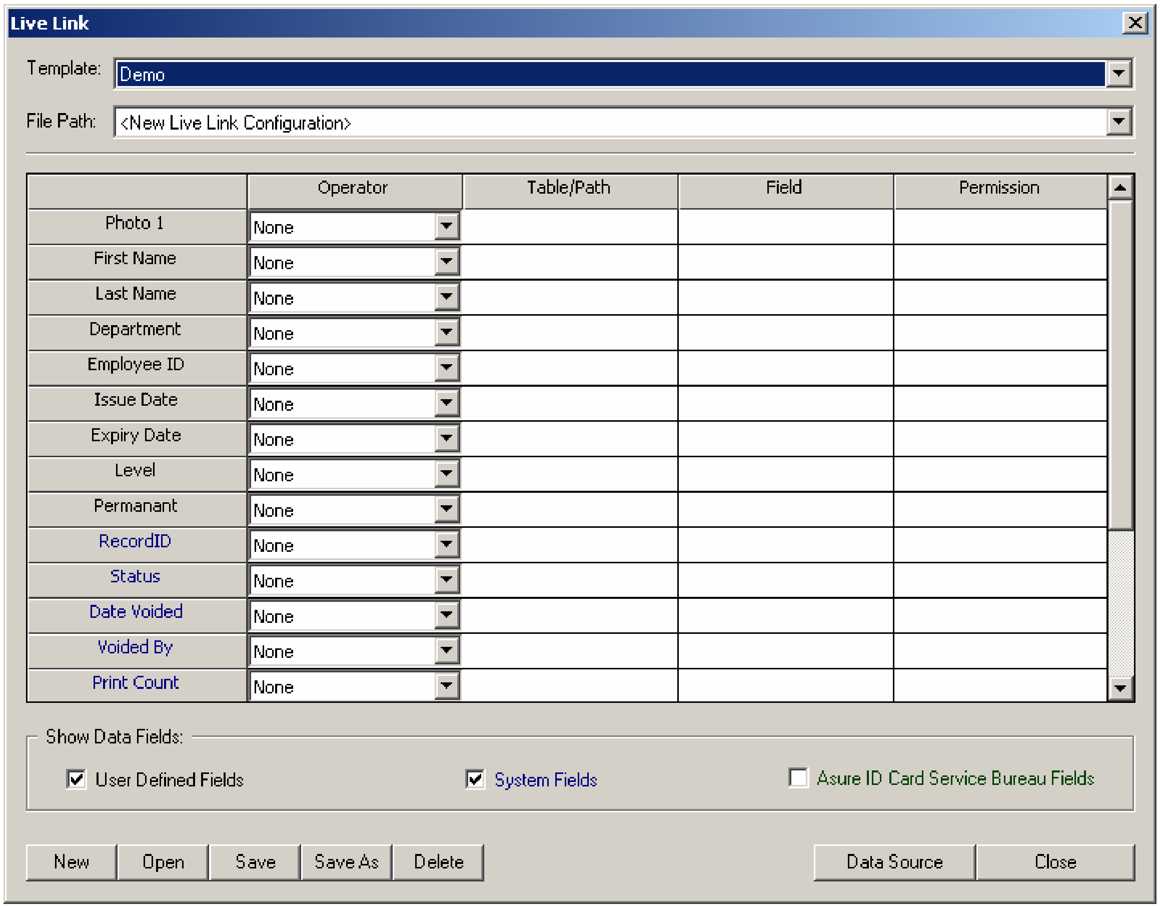
When supplying authentication information in this window, please note that Asure ID’s ability to access tables, fields, as well as read and write from the database will be governed by the permissions granted to the user name that is supplied for authentication. If you are using a ‘read only’ account, Asure ID will be unable to write new records into the linked database. We recommend that you use an Administrator account with full database access when configuring the authentication information. After entering in the correct authentication information, check the “Allow Saving Password” box before you continue.

When you have made the appropriate database and authentication settings, press the “Test Connection” button to test the settings. If you see a message stating that the database connectivity tests were successful, you have made the correct settings, and can press “OK” to save the database configuration and close the window – you have now successfully selected and authenticated your database for Live Link operations, and may move on to the second step – mapping the fields.

If the database connectivity test fails, you will need to check the settings and ensure that you have configured the database correctly. The “Advanced” and “All Fields” tabs of the window may be used to access all configuration options specific to the selected Data Source, and may be used by system administrators and advanced users to troubleshoot connection problems resulting from the choices made on the standard options presented by this window.

Mapping the Fields

Now that we have successfully chosen, authenticated and tested the database path, we need to link the template fields to the external database before our Live Link configuration is complete and can be applied. After testing the data source connection and then pressing “OK” in the “Data Link Properties” window, we will be brought back to the main Live Link interface.



There are three types of fields contained in any Asure ID template – ‘User Defined Fields’, ‘System Fields’ and ‘Asure ID Card Service Bureau Fields’, and check boxes at the bottom of the Live Link configuration window allow for some or all of these categories to be displayed or hidden.

User Defined Fields are all of the fields that have been added to the template in Card Design Center when it was designed. Typically each of these will be linked to the external database – if one of these fields is not linked, it will not display or store any data within Data Entry Center when the Live Link File is activated.

System Fields are Asure ID's internal administration and tracking fields that are used for every template. Fields such as 'Status', 'Date Voided', 'Date Printed' etc. are included in this group. If you wish to be able to use Asure ID features such as Voiding Cards, Printed Card Reports, etc., you will need to link these fields into your selected database. If you do not link them, these features of Asure ID will not be available. You may need to create some new fields in your external database to store these values.

IMPORTANT NOTE ON PRIMARY KEYS

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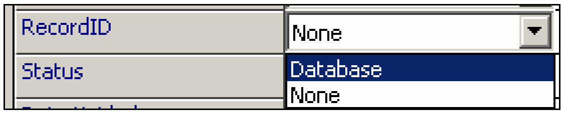
*One of the **System Fields** is very important, and requires further discussion for anyone working with Live Link configurations. The "**RecordID**" field is the default Primary Key (database index) field for all Asure ID templates and records. A user in Card Design Center may override this primary key (for a given template) by marking one of the User Defined Fields as a primary key. If a new primary key is established on one of the User Defined Fields, the user may safely ignore the "RecordID" System Field; however they **must** make sure they have linked their User Defined primary key field to the primary key (unique) field of the external database. If the template does not supply a User Defined primary key, the **RecordID** System Field **must** be linked to a unique key field within the external database. Failure to link the primary key will prevent the Live Link configuration from functioning. Please note that the primary key in the external database must be an 'auto-incrementing' field, containing unique sequential values.*

Asure ID Card Service Bureau Fields are internal administration and tracking fields that are only used if the user will be transmitting cards from Asure ID to an external Asure ID Server Internet-based Card Service Bureau for printing. If you are using an external Card Service Bureau with Asure ID Exchange, you must also link these fields into appropriate space in your external database. If you are not using a Card Service Bureau, you may safely ignore these fields.

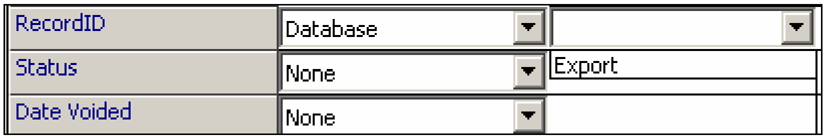
Now that we have examined the different field types, let's perform the linking. Start by checking **User Defined Fields** as well as **System Fields**, but not **Asure ID Service Bureau Fields**.

As discussed above, it is extremely important to ensure that the primary key is linked before we apply a Live Link configuration, so we should start with this field. If your card template has a custom primary key field set by the designer, locate this field in the list, otherwise, begin with the **RecordID** field. Remember, you must choose a field containing incremental, unique numbers. If your database does not have one, you can simply create an 'autonumber' field within the selected table, and link to that.

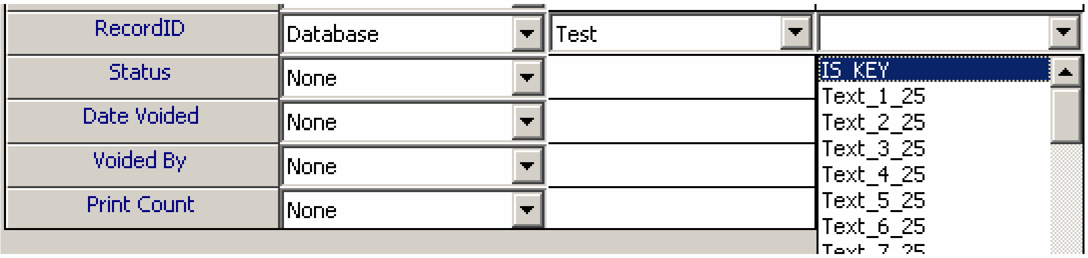
Beside each field name in the Live Link window, there is an **Operator** column with a drop-down menu. The items on the menu are **Database**, **Folder** and **None**. The **Folder** option is only applicable to photograph, signature and biometric images, all other values must be stored within a database. Because we are linking a primary key field that **must** be linked, we cannot select **None** for this field, so choose **Database** from the drop-down menu.



Whenever a field is being linked and **Database** is selected in the **Operator** column, the next column, marked **'Table/Path'** will refresh to display a list of all tables within the linked database. Select the table that contains the external database field you wish to link to the **RecordID** field (or other primary key if dictated by the template design).



After selecting a table, the next column, marked **'Field'** will refresh to list the database fields within the selected template – choose the field you wish to link to the template's primary key.



After you have selected the field, the final column, marked '**Permission**' will update to show you the database permission you have for the external database. '**Read/Write**' means you have full control within the field, while '**Read Only**' means that you cannot write new values into the field. A primary key field **must** allow full access for the Live Link configuration to function properly.

	Operator	Table/Path	Field	Permission
Photo 1	None			
First Name	None			
Last Name	None			
Department	None			
Employee ID	None			
Issue Date	None			
Expiry Date	None			
Level	None			
Permanant	None			
RecordID	Database	Test	IS_KEY	Read/Write

We have now configured the first field for Live Link! Hopefully you are starting to get a feel for what a powerful yet intuitive tool Live Link is. All other fields will be configured in the same manner, that is: Select the Operator, then the Table, and then the Field. This procedure allows any of Asure ID's template fields to be linked intuitively to an external database. Within a given Live Link configuration, you may link to as many different tables as you would like, however they all must be within the same database instance.

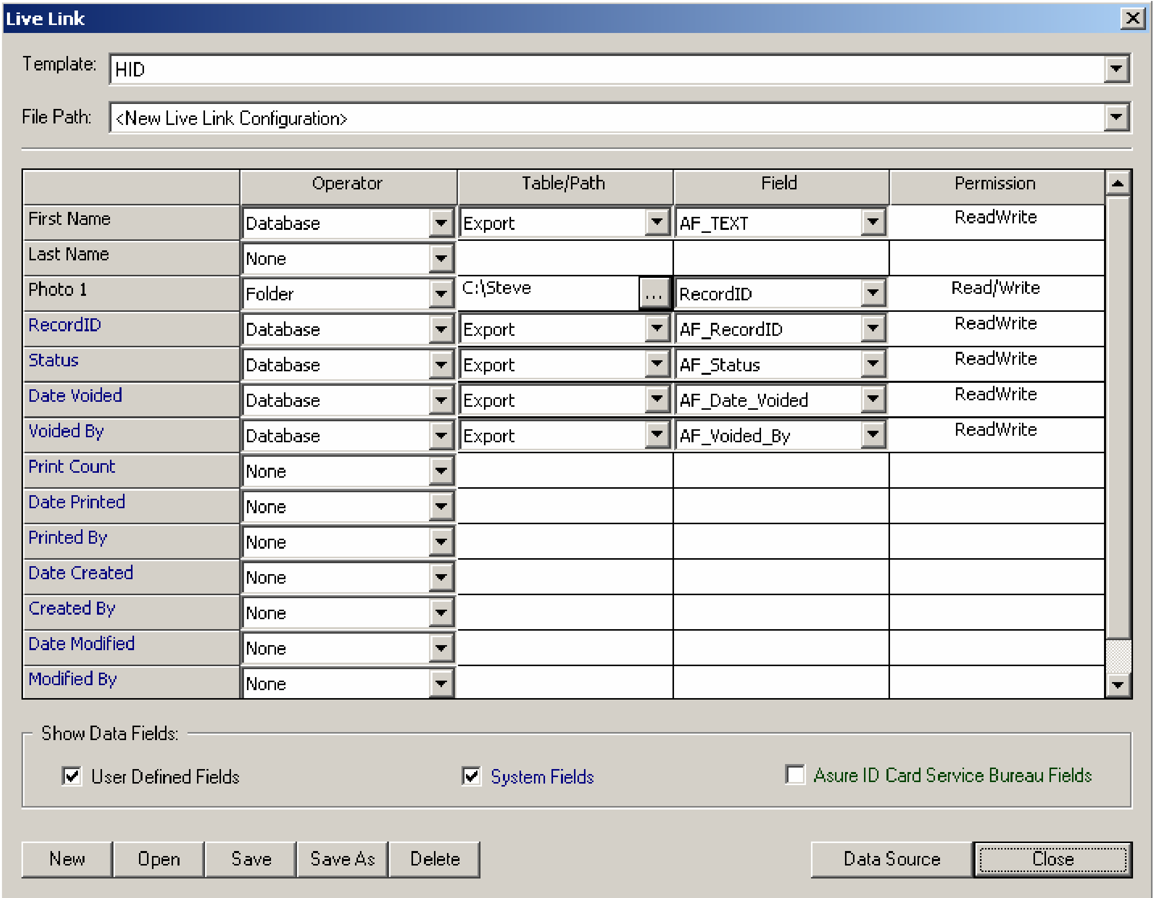
You may now link any or all of the other fields to your database in the same manner that you used for the primary key field.

The 'Folder' Operator

The only difference you may encounter from the above procedure is with the '**Folder**' option found on the **Operator** column. As stated above, this option may **only** be used for image fields – that is photograph, signature or biometric images. The purpose for this operator is to allow the storage of image files within a file folder instead of a database. If you select **Folder** for an image field, you will have a '..' button in the **Table/Path** column that can be used to browse for a folder in which to store the files. Additionally, when selecting a **Folder** operator, the **Field** column will refresh to show all of the template fields – since Asure ID needs to know the filename of the image file to use for each database record, you will need to supply a template field that will provide the naming convention of your image files. For example, if the image files will have the same name as the Employee ID for a given cardholder, select this field in the **Field** column. This naming convention will also be used when storing new images files to the folder, so ensure that you choose a field that will contain a **unique** value for each cardholder.

	Operator	Table/Path	Field	Permission
Photo 1	Folder	C:\temp ...	Employee ID	Read/Write

Once you have linked all of the fields you wish to use, the Live Link configuration window should look something like the screenshot below.



Once you have configured the linking in the manner you desire, press the '**Save**' or **'Save As**' buttons to save your configuration. Once it is saved, you can press the '**Close**' button to exit the Live Link configuration window.

At this point, your Live Link configuration is saved, however it is not yet applied, and Asure ID is still reading and writing cardholder records from its own default database.

To switch to the set of records that your Live Link configuration will provide, again click on the '**Live Link**' drop-down menu at the top of the screen. You will now see that below the '**No Live Link**' option is a new entry for the Live Link File that you just saved. Any saved Live Link Files for the active template will be shown on this list, and you may use this menu to switch between them. Select the Live Link File that you saved, and Asure ID will refresh the cardholder set – instead of showing you records in the default Asure ID database, you will now see the record set provided by the external database that you configured Live Link with.

You may switch back to the default record set at any point by choosing '**No Live Link**' from the '**Live Link**' drop-down menu, and can switch to any previously saved Live Link configuration by selecting it from the same menu.

Congratulations! You have reached the end of the Live Link quick start guide. Hopefully you are now comfortable enough to begin exploring this new tool, and are able to easily set up any external database linking that you desire.

Quick Start Guide - Using An Asure ID Card Service Bureau

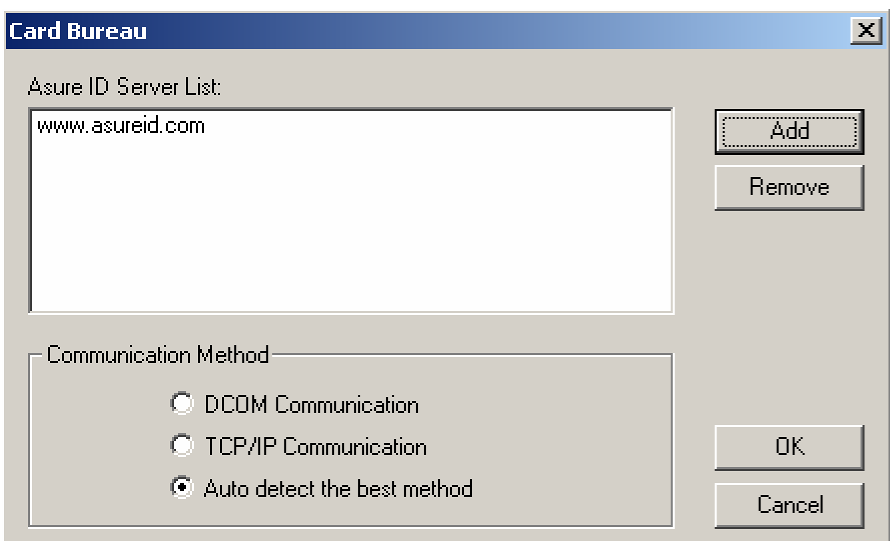
Introduction

Asure ID allows you to easily use the Internet to securely transfer card data in a '**ready to print**' format to an Asure ID Card Service Bureau for primary or backup card production. It's easy and means that you can produce cards no matter what. Let's take a look at the simple steps involved so that you can see how simple and convenient using an Asure ID Card Service Bureau is.

Connecting to a Card Bureau

From within the Asure ID Admin Center you will see a button on the lower left labeled '**Card Bureau**'. If you click on it, you will be able to enter the IP address or URL of the Asure ID Card Service Bureau (Asure ID Partner) that you would like to have produce (print/personalize) your cards.

In the screen that appears, simply click the '**Add**' button, type in the IP address (example: 209.146.244.66) or URL (example: www.asureid.com) of your Asure ID Card Service Bureau into the space provided, press the '**OK**' button and then press '**OK**' again to close the window and save your settings.



If you do not have the IP address or URL you will need to contact your Asure ID Card Service Bureau for this information. If the Asure ID Partner who sold you the Asure ID software does not support this service then you will need to contact Asure ID technical support to obtain the contact information of the Asure ID Card Service Bureau nearest you.

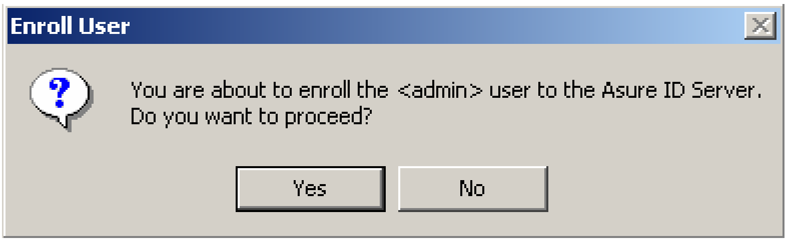
Now that the IP address or URL is properly entered you will need to enroll the user(s) who will be responsible for sending card data to the Asure ID Card Service Bureau.

Enrolling With An Asure ID Card Service Bureau

It is important to note that any user you enroll must have both the 'send record(s)' and 'send template(s)' privileges in their user profile if they are to be successful in sending card data.

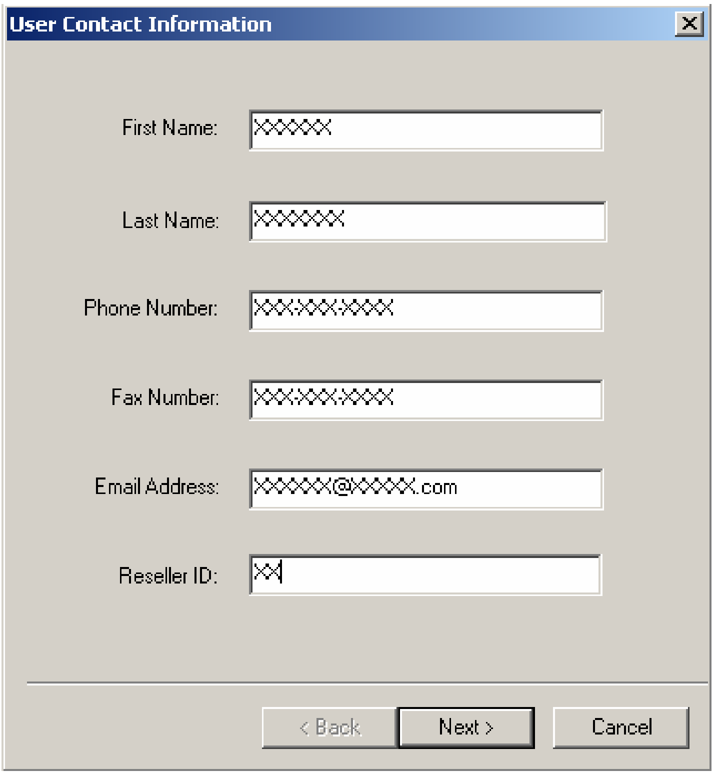
To enroll a user, simply click on that user's name to highlight it, and then press the '**Enroll User**' button on the left hand side of the main **Admin Center** screen.

A confirmation window will appear confirming the user name you are about to enroll, press '**OK**' if you are certain you want to proceed.



User Contact Information

You will now see the same '**User Properties**' dialog box you filled out when you originally added this user. Confirm this is the user account you would like to register and press '**Next**' to move to the '**User Billing Information**' dialog box.



User Billing Information

To finish the registration process you will need to fill out the billing and shipping information associated with the user being enrolled in the '**User Billing Information**' dialog box. When you are finished, press the '**OK**' button to complete the enrollment.

In a few seconds you should get a response on your screen from the Asure ID Card Service Bureau notifying you that the enrollment was successful.

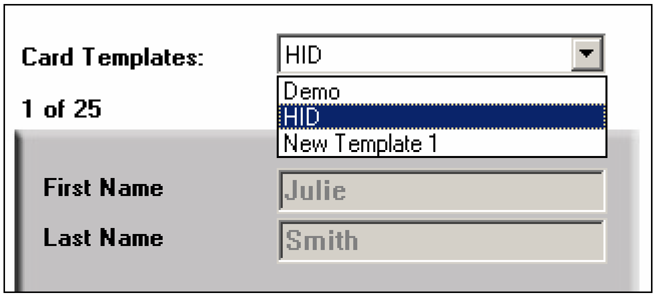
That's all there is to enrolling a user with an Asure ID Card Service Bureau! If you already have cardholder records in Data Entry Center, you can move on to the next step to send them to the Card Service Bureau for production.

Sending cards to a Card Bureau

When you have finished designing your card template and have used Data Entry Center to add the card records, you will find that sending cards to an Asure ID Card Service Bureau is just as simple as everything else about Asure ID!

From within the Data Entry Center you will need to select the template to be sent to the Asure ID Card Service Bureau. You will only have to send this template once unless the template is modified, in which case Asure ID will notify the user the next time card data associated with this template is sent.

Select the desired template from the drop-down '**Card Template**' menu at the top of the Data Entry Center main screen.



Next, in the main menu bar at the top of the screen click on the '**Communication**' drop down menu and select '**Send Template Data**'. This will send the card template to the Asure ID Card Service Bureau. Within a few seconds (depending on the template file size and the speed of the Internet connection) you will get a confirmation receipt on the screen, which you may discard or print for later reference.

Now all that is left to do is to send the card data. You have several options when sending card data to the Asure ID Card Service Bureau which are as follows: '**Send Displayed Card**', '**Send Selected Cards**' or '**Send All Unsent Cards**'.

You may choose which one you would like to do in one of two ways.

- Click on the '**Send Cards**' button on the left hand side of the Data Entry Center screen, which will automatically send all unsent cards to the Asure ID Card Service Bureau.

- Alternatively, you may use the '**Communication**' drop down menu (at the top of the screen) and make your selection from the three options presented.

Within a few seconds (depending on the quantity of cards sent and the speed of the Internet connection) you will be presented with a receipt including the name of the user, the date, the number of cards sent, and a card transaction number for future reference.

You will also notice a '**Sent Card**' icon appear to the left hand side of any card record that has been successfully sent to an Asure ID Card Service Bureau.

Use this '**pay as you print**' card bureau service for backup or primary card production – no matter how big or small the print job may be.

iDIRECTOR

Introduction

The iDIRECTOR technology platform, allows multiple applications to be loaded onto a smart card via a single, seamless process. In addition to the card selection and configuration tools provided, iDIRECTOR offers the following application modules:

- Logical access control (RF IDeas Air ID),
- Electronic Purse (QI Purse)
- Biometrics (Bioscrypt Fingerprint).

These applications are accessible on a drop down menu. This means that multiple applications can be loaded onto a smart card in one easy step at the time of issuance.

iDIRECTOR also allows users to load database information (e.g., first name, last name, photo) into their cards.

Document Section	Use when…
Installation and Registration Overview	…you are installing Asure ID for the first time.
General Note about Field Sizes for Fields Linked in iDIRECTOR	…you want general information about field sizes for fields linked in iDIRECTOR
Logical Access Control (RFIDeas Air ID) – General	…you wish general information about the required and optional fields of this application
Logical Access Control (RFIDeas Air ID) – Required	…you wish to add only the Required Template fields.
Logical Access Control (RFIDeas Air ID) - Required plus Optional	…you wish to add both the Required Template fields and the Optional Template fields.
Logical Access Control (RFIDeas Air ID) – Customized	…you wish to customize the Template fields.
Electronic Purse (QI Purse) – Required	…you wish to add only the Required Template fields.

Document Section	Use when…
Electronic Purse (QI Purse) – Required plus Optional	…you wish to add both the Required Template fields and the Optional Template fields.
Electronic Purse (QI Purse) – Customized	…you wish to customize the Template fields.
Biometrics (Bioscrypt Fingerprint) – Required	…you wish to add only the Required Template fields.
Biometrics (Bioscrypt Fingerprint) - Required plus Optional	…you wish to add both the Required Template fields and the Optional Template fields.
Biometrics (Bioscrypt Fingerprint) – Customized	…you wish to customize the Template fields.
Capture, Load, or Verify Biometrics	…you want to capture, load or verify biometrics. You want view the system names for each biometric.
Chip Properties - Custom Tab	…you want information about using the “Custom” tab of the “Chip Properties” box.
Field Properties Box	…you wish to view or change field properties. **Note:** Some fields have preset values.
Memory Maps	…you wish to view or move memory blocks. **Note:** Some memory blocks have preset values.
Card Brand and Type	…you wish to view the Brand and Type field options you have for cards used with iDIRECTOR.
Remove application from Chip Properties Box	…you want to remove an application from the Chip Properties Box.
Remove Fields from Non-Printing Entries Box	…you installed fields you did not require.

Installation and Registration Overview

Refer to the “Quick Start Guide – Installation” for details about installing and registering Asure ID programs.

If you have purchased Asure ID Exchange because of the iDIRECTOR component, we suggest that you also refer to the “Quick Start Guide – A Step by Step Tutorial” to learn about other components with which iDIRECTOR can interface.

If you are an existing Asure ID Exchange client, proceed to the iDIRECTOR component you want to learn more about.

General Note about Field Sizes for Fields Linked in iDIRECTOR

The following applies to field sizes for fields linked in iDIRECTOR.

Linked Fields Created in the CDC

When creating a field that will be linked to a field on an iDIRECTOR application, ensure that the maximum size limits of the field you are linking to are reflected in the field you are creating.

Please note that you will be able to increase the size of your created field so that it is greater than the maximum size of the iDIRECTOR field, however the following will occur in the DEC.

Working with Linked Fields in the DEC

When entering a value into a field that was linked in the CDC and, where that value exceeds the maximum field size of the field to which you linked, your data will be truncated to the length of the maximum field size for the iDIRECTOR field.

Logical Access Control (RFIDeas Air ID) – General

There are three fields associated with Logical Access Control (RFIDeas Air ID). They are briefly described in the table below.

Field	Field is available as a Required / Optional / Customized field	Description
Credential1	R/C	This is the first credential information that is written to the contactless card. Examples: • User Name • Other Logon Identifier
Credential2	R/C	This is the second credential that is written to the contactless card. Examples: • Password • Other Logon code
Card Gone	O/C	The value of the Card Gone field is the keystrokes that are to be invoked for a card when it is removed from a reader device. And example of keystrokes might be CRTL+ALT+DEL, ENTER to sign off a program or terminal. **Note:** This field is an optional field and the action specified in the field keystrokes is only invoked if the field is selected to be added to a card.

Example:
Entity (A) wants to give their users Logical Access Control for signing into Windows. They choose the required fields for Logical Access Control (RFIDeas Air ID).

Credential1 might be set up as “User Name” and the “Pre-keystrokes” field on the “Properties box” might be equal to CRTL+ALT+DEL, ALT+u. The “Post-Keystrokes” field might be equal to TAB.
Credential2 might be set up as “Password” and the Post-keystrokes field on the “Properties box” might be equal to ENTER.

In the above example, when the user places their card on the reader device the following will occur:

The reader device will read the card and invoke the CRTL+ALT+DEL commands. It will then invoke ALT+U to call up the sign in screen. It will read the User Name from the card and then invoke the TAB command. It will then read the password from the card and open Windows for the user.

Logical Access Control (RFIDeas Air ID) – Required

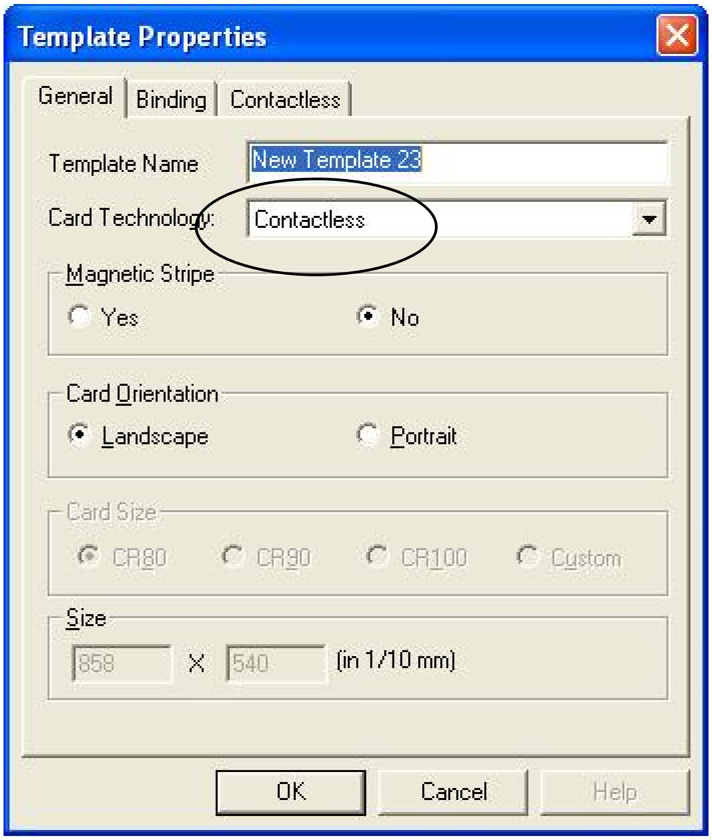
This section contains the steps to take to add the “Logical Access Control” component to a card where only the Logical Access Control “Required Template” fields will be added to the card.

1. Logon to Asure ID.

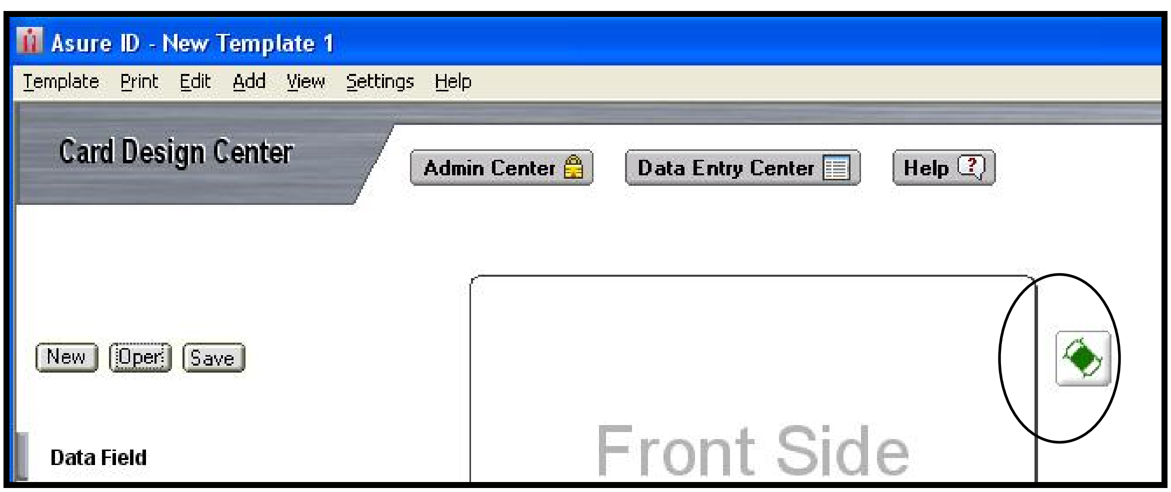
2. Go to “Card Design Center” (CDC).

3. Click on the “New” button located in the top left quadrant of the screen.

   The “Template Properties” screen displays:

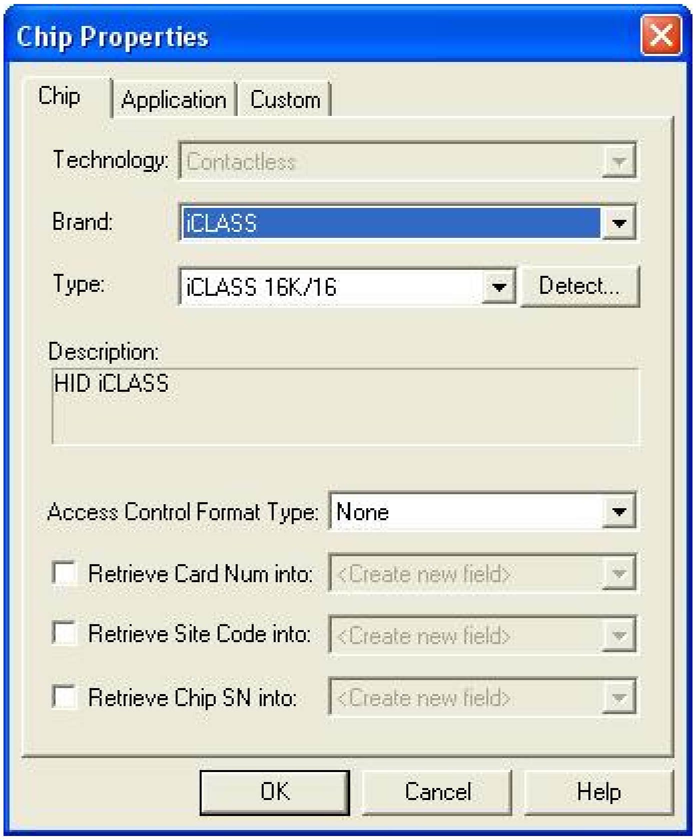


4. From the drop down menu under the “Card Technology field” select “Contactless” and click “OK” to return to the “Card Design Center” screen. A chip icon now appears to the right of the “Front Side” of the card.



5. Click on the “Chip Icon”. The “Chip Properties” box displays.

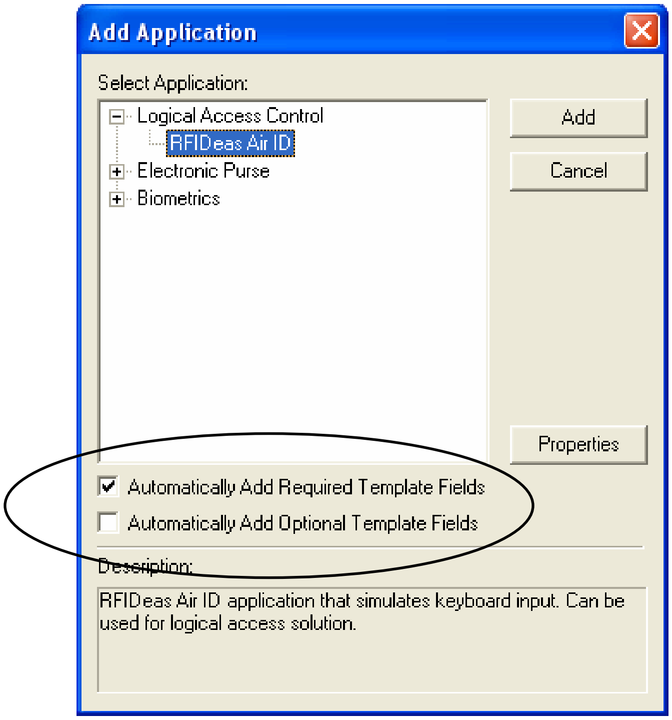
6. Ensure that the Brand and Type fields reflect the correct values for your “Technology Contactless” cards. Refer to section “Card Brand and Type” for more information.



7. Select the “Application Tab” of the properties box.

8. Highlight the “iClass” folder.

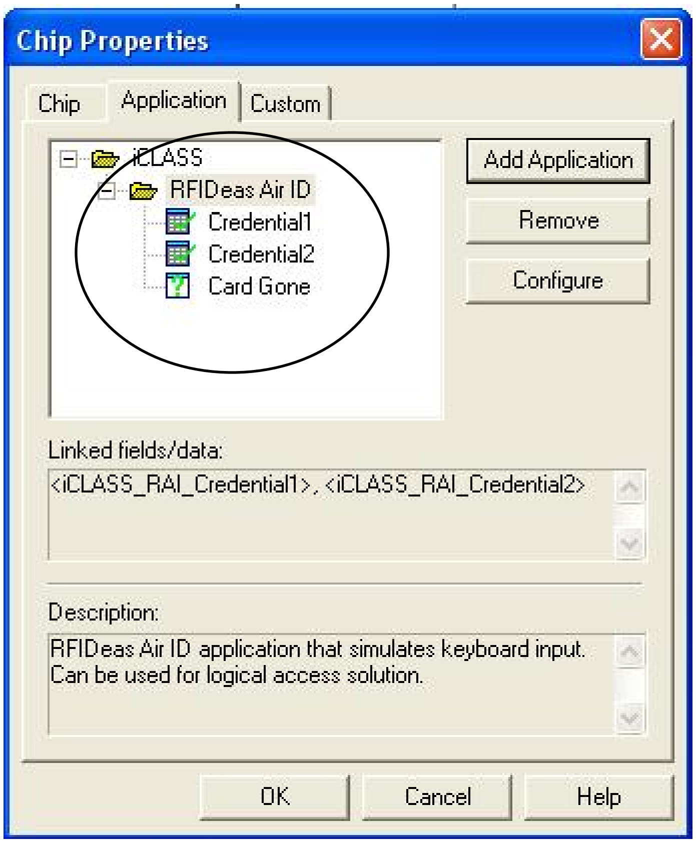
9. Click on the “Add Application” button. The “Add Application” box displays.



Note: Ensure that **only** the “Automatically Add Required Template Fields” box contains a check mark.

10. Click on “Logical Access Control” and select RFIDeas Air ID”.

11. Click on the “Add” button to go to the “Chip Properties” box.

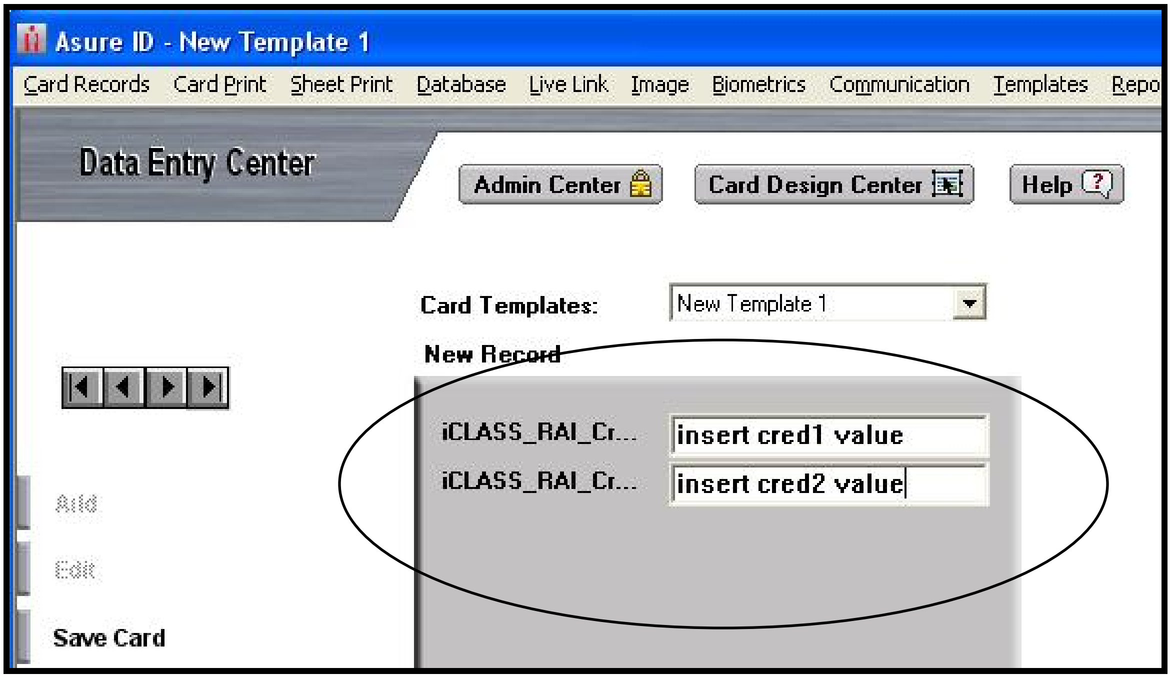


Note: **Only** the two required fields (Credential1 and Credential2) are checked off.

12. Click “OK” on the “Chip Properties” box. You are returned to the “Card Design Center”.

13. Design and save your card. (Refer to the Quick Start Guide – A Step by Step Tutorial for more information about designing a card.) Once your card is designed and saved, go to the “Data Entry Center” screen.

14. Click on “Add Card”. The following displays:



15. Enter the credentials in the fields where:
    - iCLASS_RAI_Credential1 equals the credential1 value as set by the client (e.g., User Name).
    - iCLASS_RAI_Credential2 equals the credential 2 value as set by the client (e.g., User Password).

16. Click on “Save Card”.

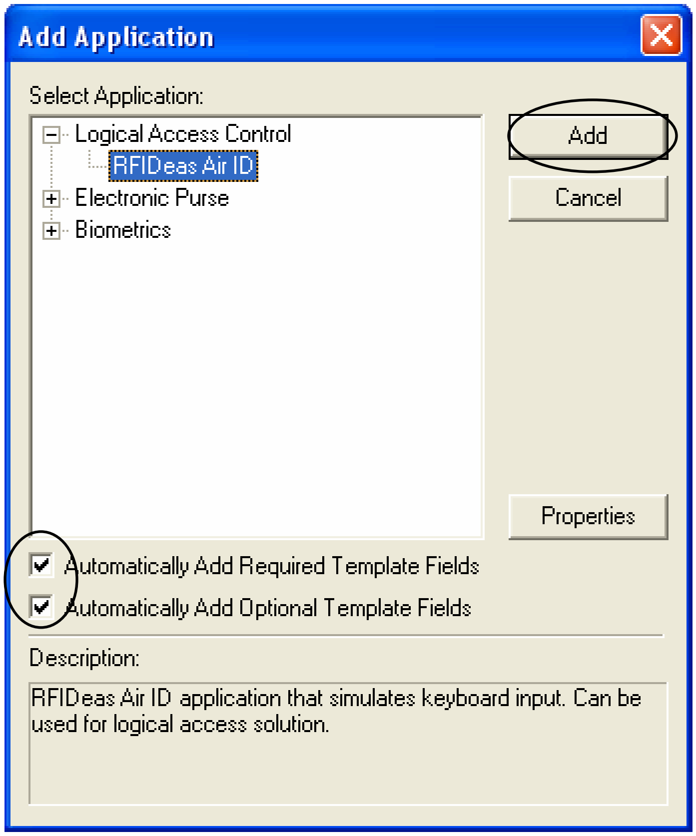
Logical Access Control (RFIDeas Air ID) – Required plus Optional

This section contains the steps to take to add the Logical Access Control component to a card where both the required and optional template fields will be added to the card.

The optional field is the Card Gone field. This field is set to a value that indicates the action to be taken using Credential 1 and Credential 2. **Example:** If Credential 1 and 2 are set to "User Name" and "User Password" then the Card Gone value may be set to a value such as "CTRL+ALT+DEL, ENTER".

Perform steps 1 – 8 from the **Logical Access Control (RFIDeas Air ID) – Required** section and then continue with the steps below.

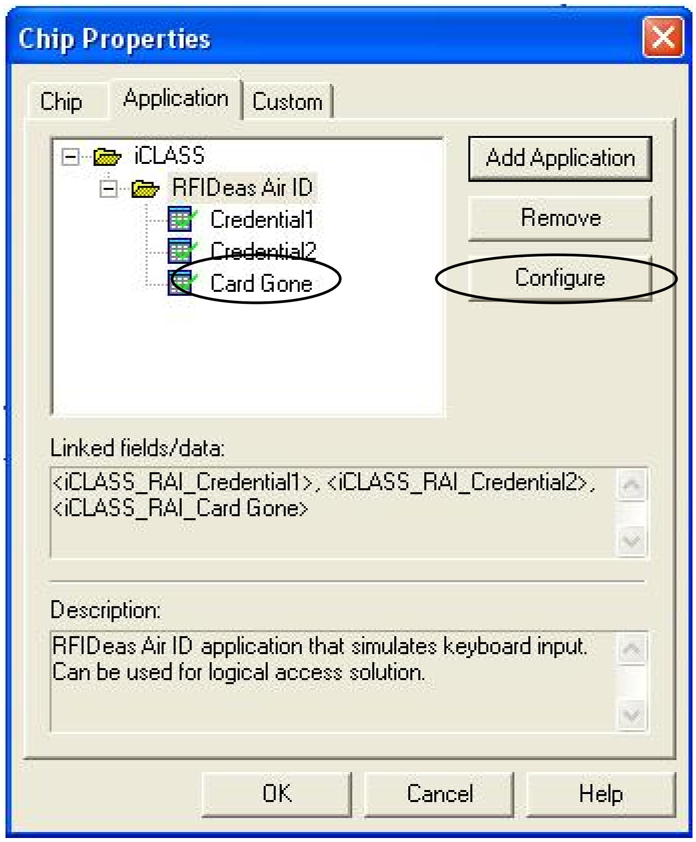
9. Click on the "Add Application" button. The "Add Application" box displays.



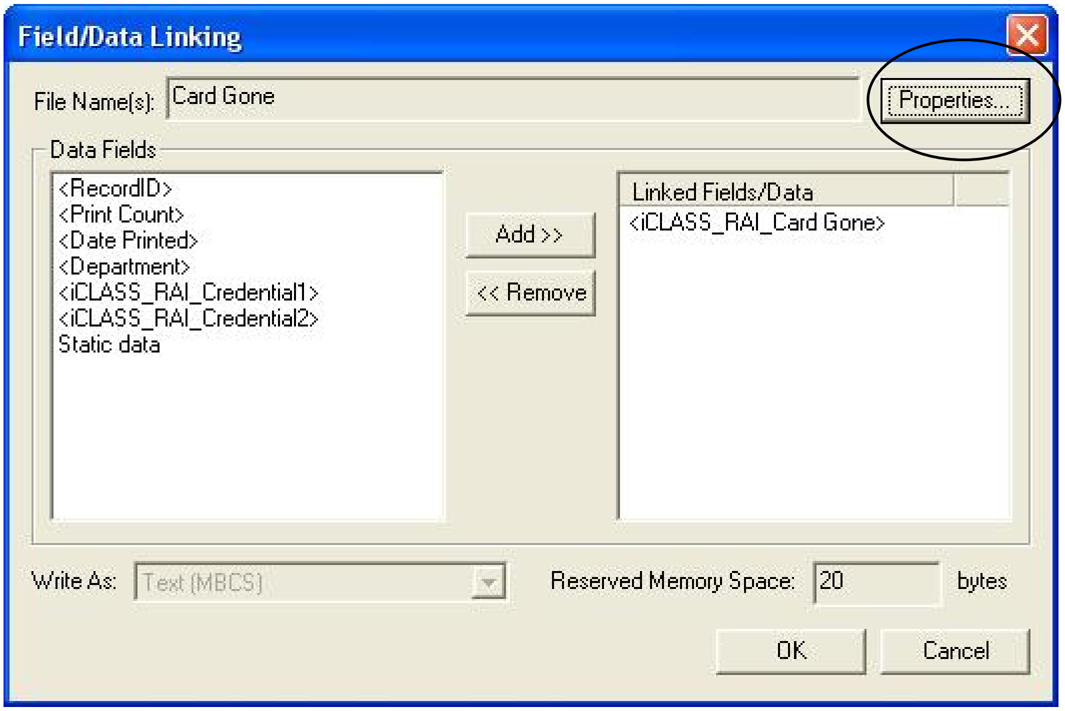
10. Double click on the Logical Access Control selection.

11. Highlight “RFIDeas Air ID” and if required, check the box entitled “Automatically Add Optional Template Fields”.

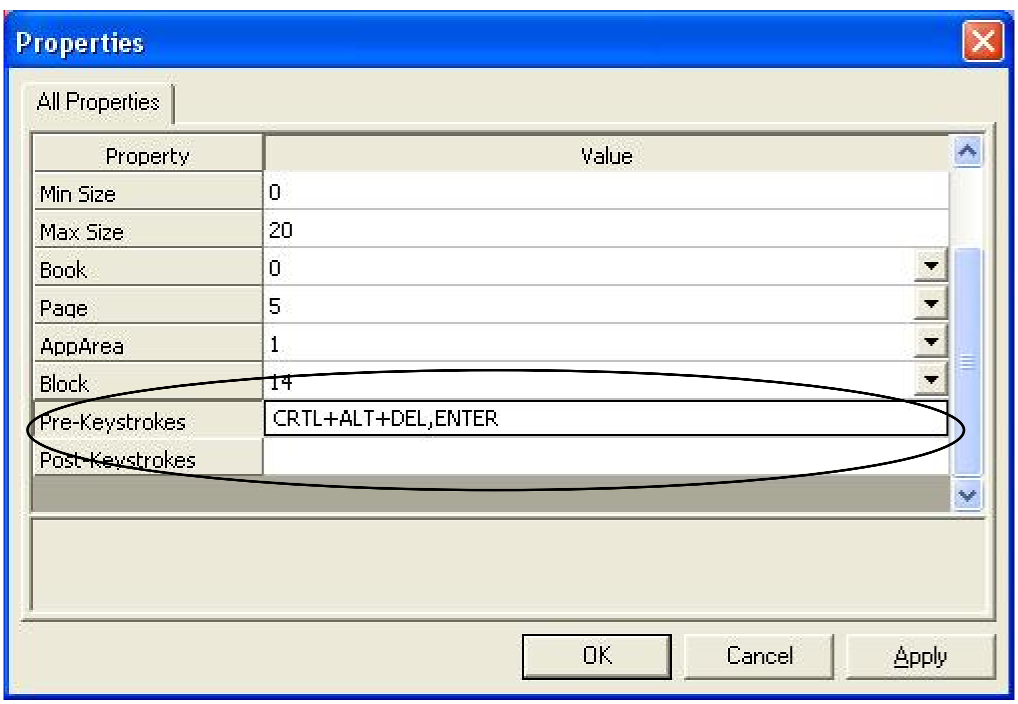
12. Click on the “Add” button to return to the “Chip Properties” box. The following box displays:



13. Highlight “Card Gone” and click on the “Configure” button. The “Field/Data Linking” box displays.



14. Click on the "Properties" button. The properties screen for the "Card Gone" displays:



15. In the “Pre-Keystrokes” field, enter your keystrokes. **Note:** These keystrokes will be the keystrokes required for whatever is to occur when the card is used at a card reader (e.g., lock/unlock a computer station, open a door, print a document).

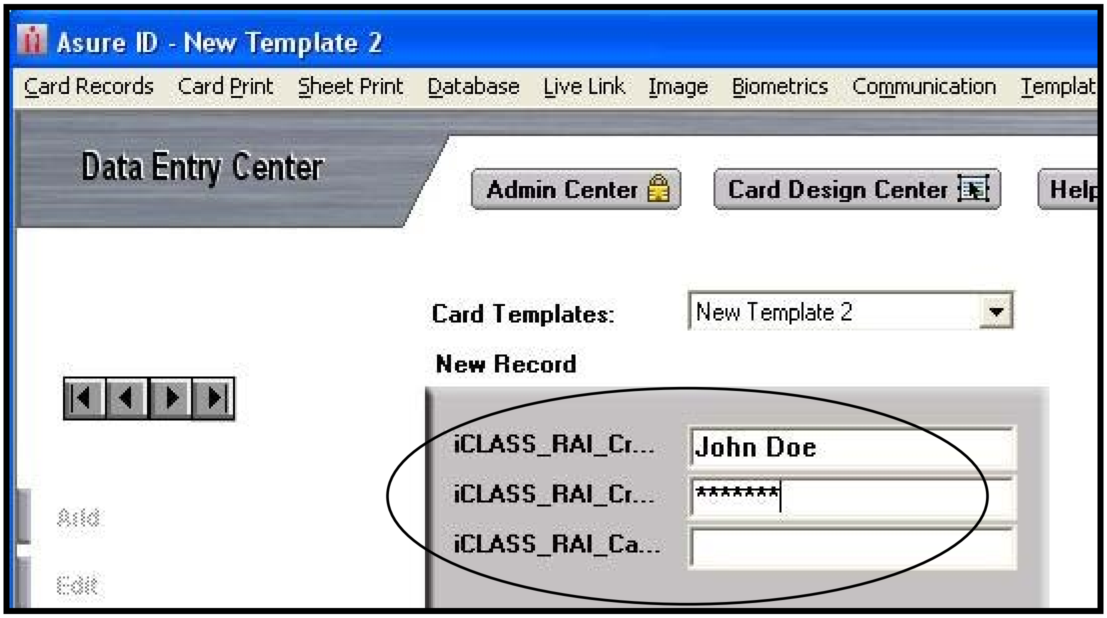
16. Click “OK” on the “Properties” box.

17. Click “OK” on the “Field/Data Linking” box.

18. Click “OK” on the “Chip Properties” box. You are returned to the “Card Design Center” screen.

19. Design and save your card. (Refer to the “Quick Start Guide – A Step by Step Tutorial” for more information about designing a card.) Once your card is designed and saved, go to the “Data Entry Center” screen.

20. Click on “Add Card”. The following screen displays.



21. Enter the credentials in the fields where:

- iCLASS_RAI_Credential1 equals the credential1 value as set by the client (e.g., User Name).

- iCLASS_RAI_Credential2 equals the credential 2 value as set by the client (e.g., User Password).
- iCLASS_RAI_Card Gone is an optional field in the "Data Entry Center" and can be left blank. This is the field that was configured earlier in steps 14-16. However, if you want to enter a value in this field, you can enter characters that are less than or greater than but not equal to the length of credential2.

Note: The maximum characters for a value are set on the "Field Properties" tab of the "Data Field Options Dialog" box.

22. Save the card.

Logical Access Control (RFIDeas Air ID) – Customized

This section contains the steps to take to add the Logical Access Control component to a card where customized Template fields will be added to the card. Refer to the "Field Properties Box" topic and the "Memory Mapping" topic for more information.

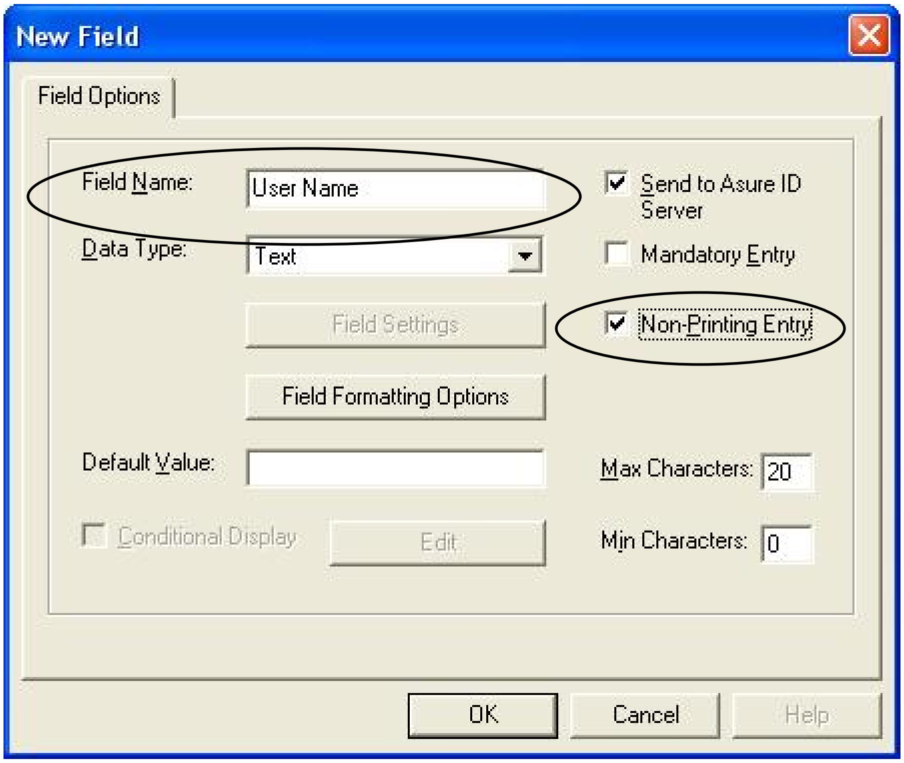
Perform steps 1 – 4 from the **Logical Access Control (RFIDeas Air ID) – Required** section then perform step 5 below.

5. Create and Link Your Customized Fields

There are three fields associated with the Logical Access Control RFIDeas Air ID application. They are iCLASS_RAI_Credential1, iCLASS_RAI_Credential2, and iCLASS_RAI_Card Gone.

To customize these fields you must first create your custom data fields on your card and later link them to the fields above.

a. On the "Card Design Center" screen, click on the "Data Field" button.



b. In the “Field Name” box, enter your customized name for your field (e.g., User Name).

c. In the “Data Type” field, select the data type for your field (e.g., Text).

d. In the “Non-Printing Entry” box, select the check mark to make the field a non-printing field. **Note:** Your field will display on the “Card Design Center” screen in the box entitled “Non-Printing Entries”.

e. Click “OK” when you are done.

f. Repeat the steps a-e for your other two customized fields.

Perform steps 6 – 9 from the **Logical Access Control (RFIDeas Air ID) – Required** section then perform step 10 below.

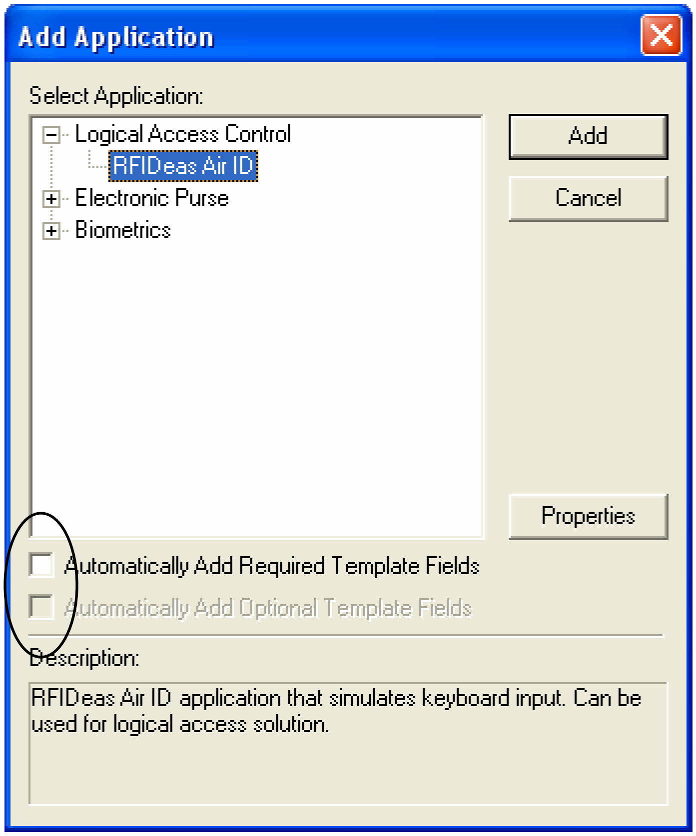
Note: After step 10, the Logical Access Control (RFIDeas Air ID) template fields are being customized and only general guidance can be provided.

10. Add the "Logical Access Control | RFIDeas Air ID Application

In this step you have to add the Logical Access Control (RFIDeas Air ID) application.

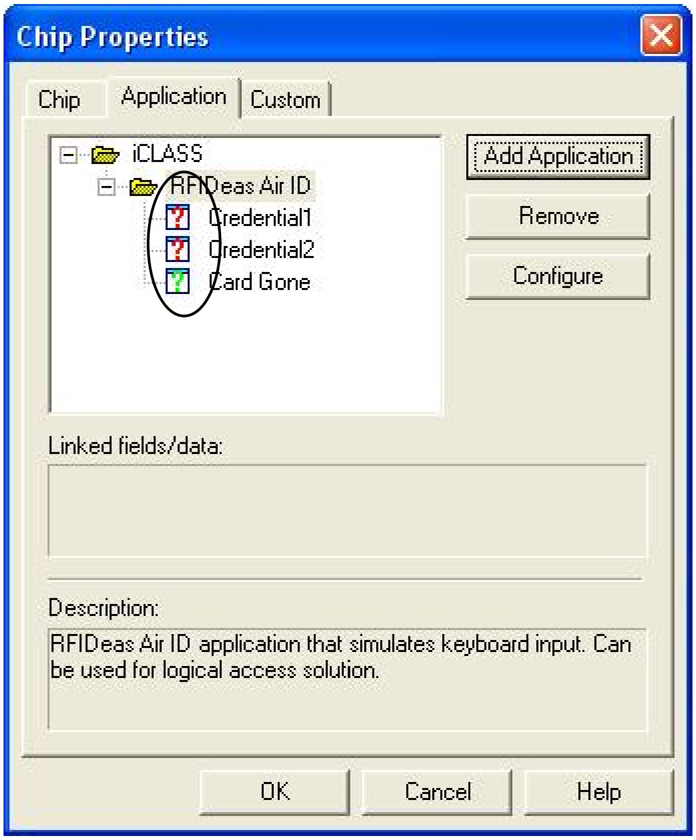
a. Click on the Chip icon located on the right hand side of the "Card Design Center" screen.

b. Click on the "Add Application" button. The "Add Application" box displays.



c. Ensure that the "Automatically Add Required Template Fields" box does not contain a check mark. Deselect it if needed.

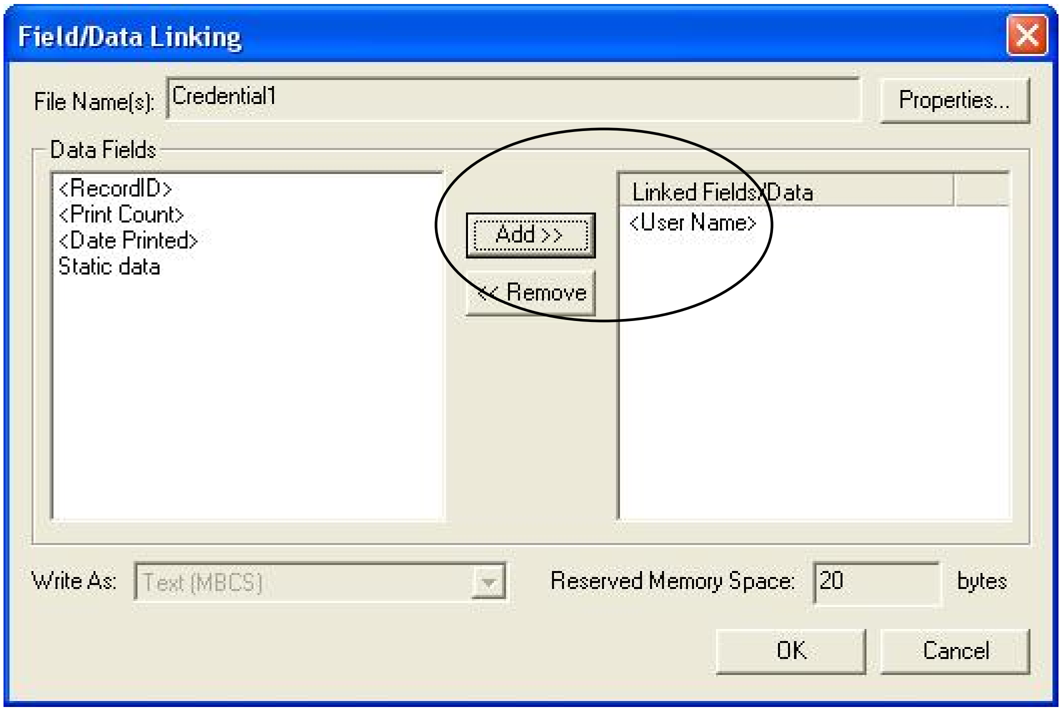
d. Click the "Add" button. The "Chip Properties" box displays.



Note1: All the fields contain a question mark. This is because you will be configuring them in a further step.

Note2: Credential1, Credetial2 contain a red question mark because they represent the required fields of the RFIDeas Air ID application.
Card Gone contains a green question mark because it represents the optional field of the application.

e. Highlight the first field to be configured and click on the “Configure” button. The “Field/Data Linking” box displays.

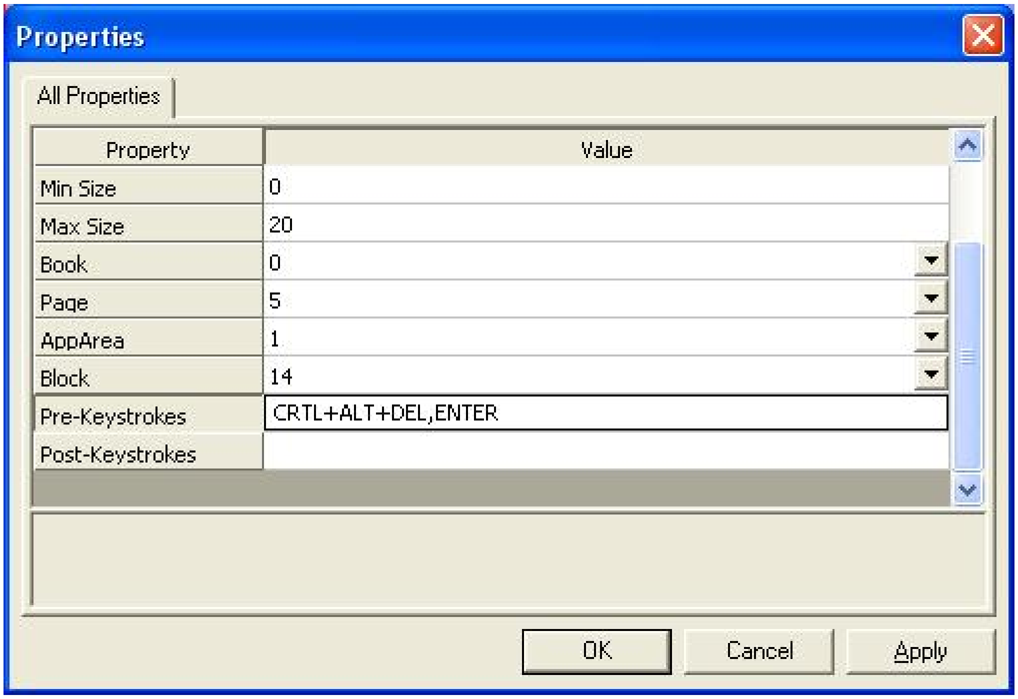


f. Link the “RFIDeas Air ID” fields to your created fields.

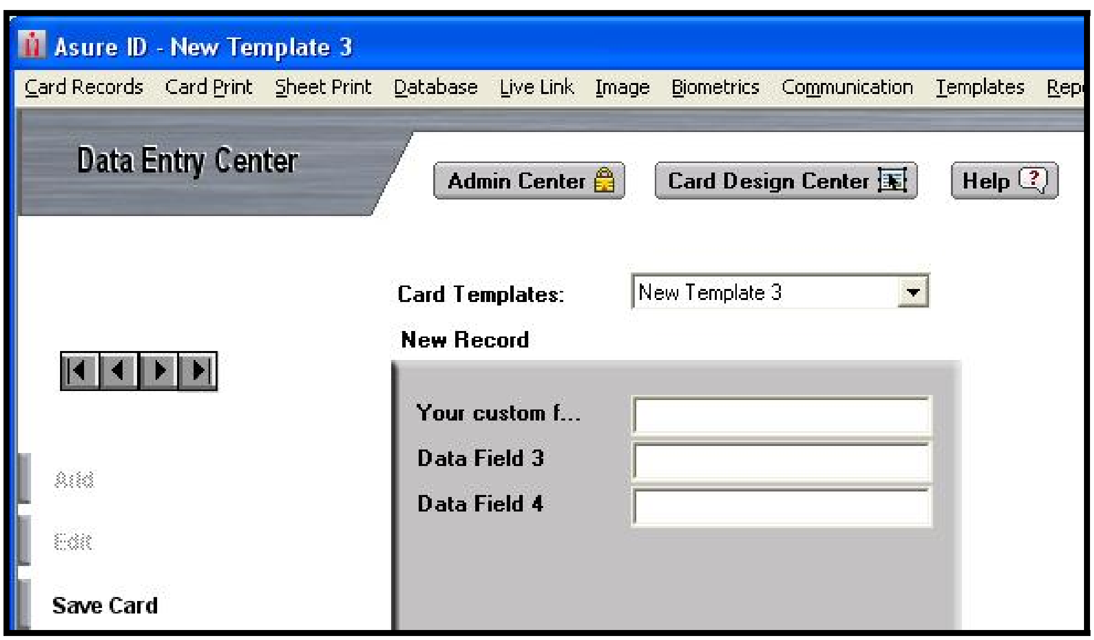
IMPORTANT: Regarding the customized field for “Card Gone” field only:

When you link your customized field to the Card gone field, you must also do the following:

Click on the “Properties” button on the “Field/Data Linking” box and enter the value for the Pre-keystrokes” field (e.g., CRTL+ALT+DEL,ENTER) and click OK.



g. Once your card is designed and saved, go to the "Data Entry Center" screen. Click on "Add Card". The following screen displays.



h. Enter the credentials in the fields where:

“Your custom field 1” equals the credential1 value as set by you (e.g., User Name).
“Your custom field 2” equals the credential 2 value as set by you (e.g., User Password).
“Your custom field 3” is an optional field for data entry, i.e., you do not need to enter data in order for the “Card Gone” action to take place. The action that takes place when the card is removed from the reader is based on what was entered into the “Pre-keystrokes” field on the Properties screen.

i. Save the card.

Electronic Purse (QI Purse) – Required

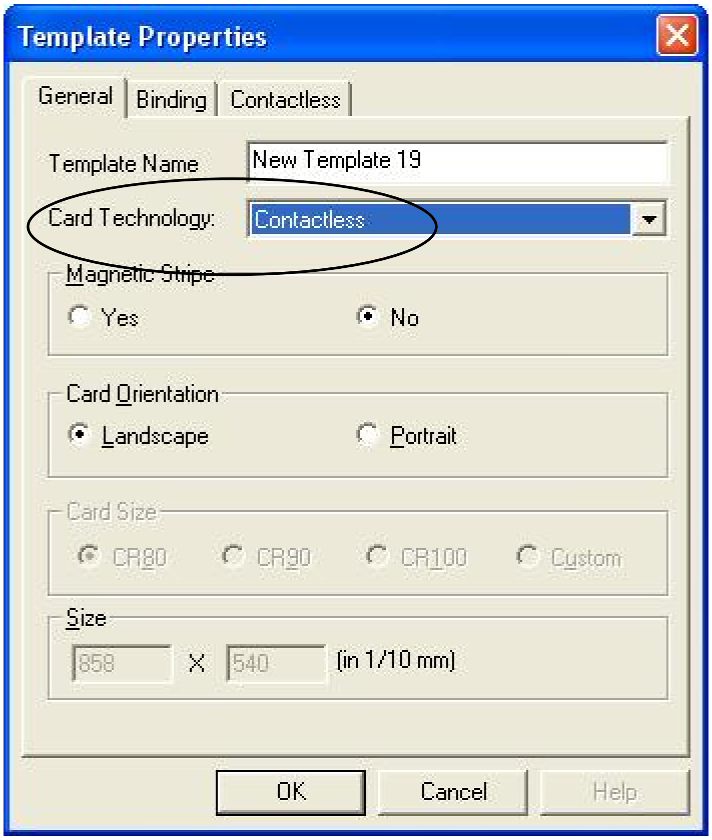
This section contains the steps to take to add the Electronic Purse component to a card where only the Required Template fields will be added to the card.

1. Logon to Asure ID.

2. Go to “Card Design Center” (CDC).

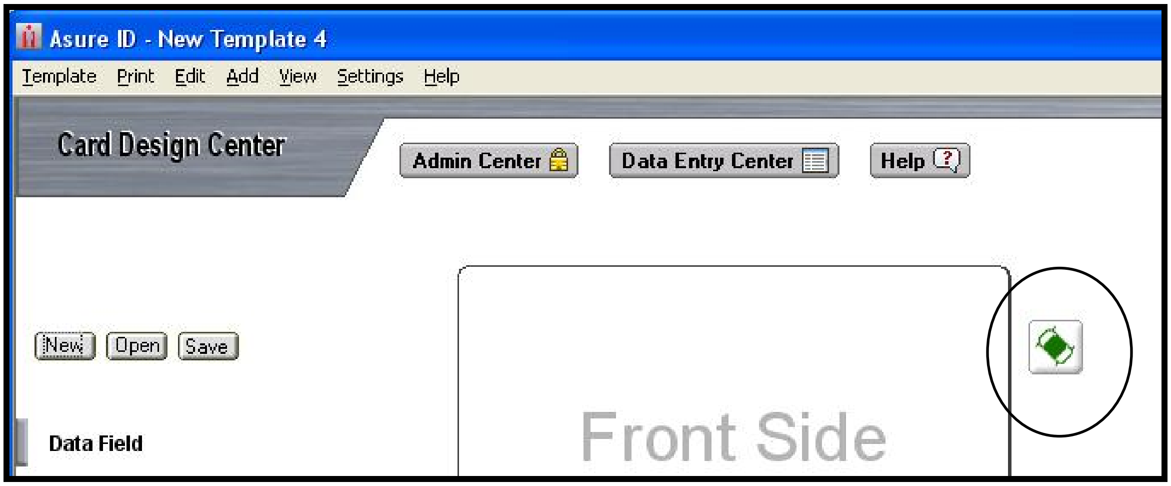
3. Click on the “New” button located in the top left quadrant of the screen.

   The “Template Properties” screen displays:



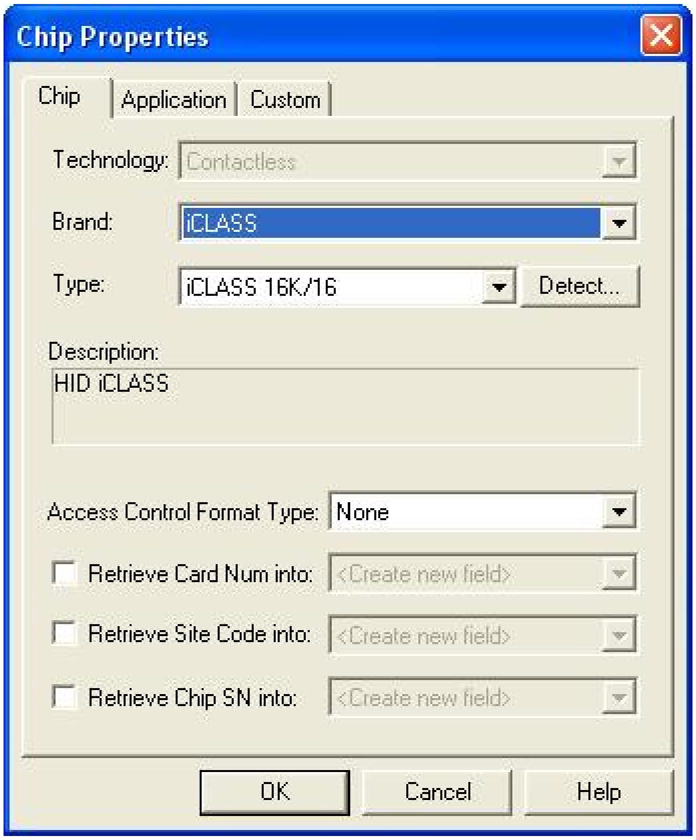
4. From the drop down menu under the “Card Technology field” select “Contactless”

5. Click “OK” to return to the “Card Design Center” screen. A chip icon now appears to the right of the “Front Side” of the card.



6. Click on the “Chip Icon”. The “Chip Properties” box displays.

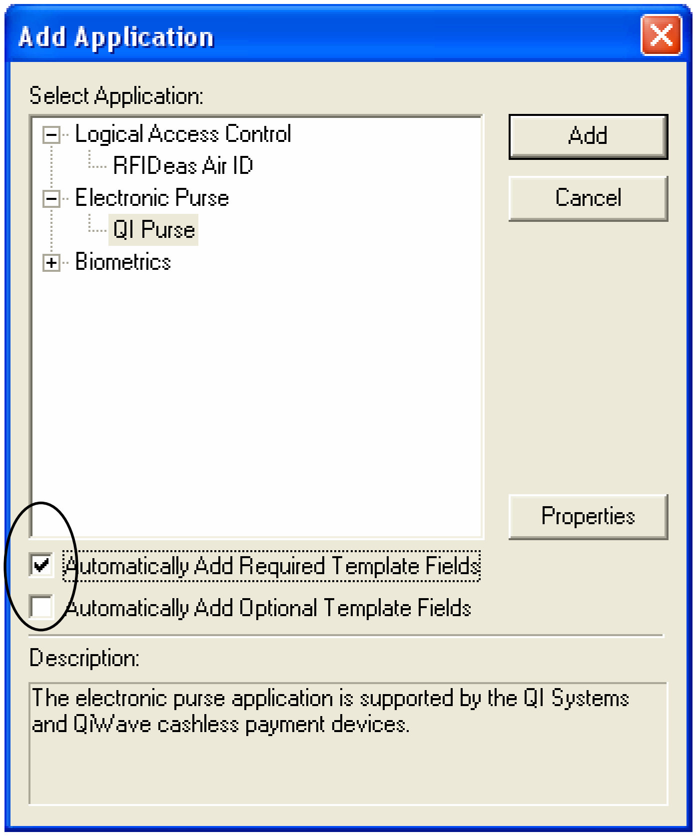
7. Ensure that the Brand and Type fields reflect the correct values for your “Technology Contactless” cards. Refer to section “Card Brand and Type” for more information.



8. Select the “Application” tab of the properties box.

9. Highlight the “iClass” folder.

10. Click on the “Add Application” button. The “Add Application” box displays.

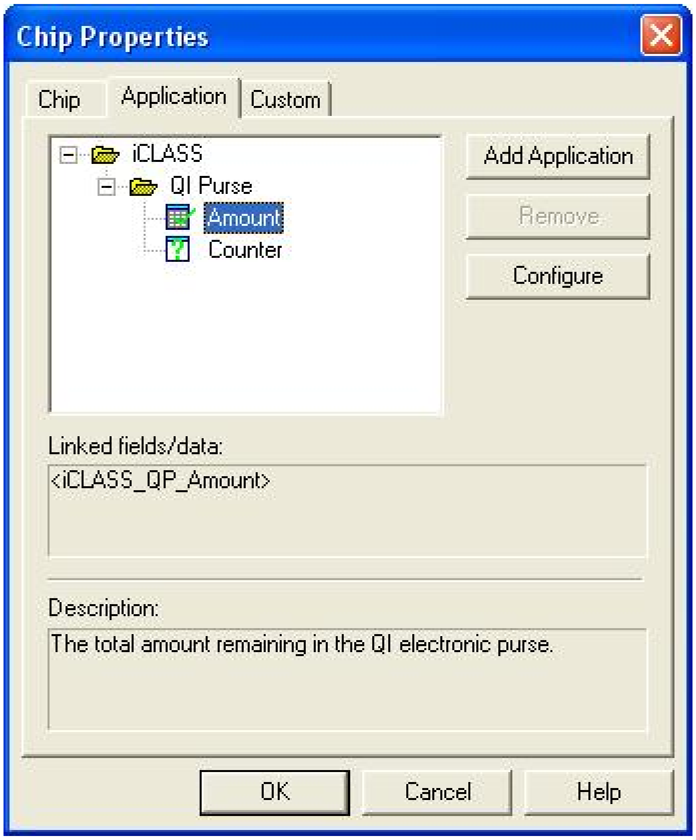


Note: Ensure that **only** the "Automatically Add Required Template Fields" box contains a check mark.

11. Double click on the "Electronic Purse" selection.

12. Click to highlight "QI Purse".

13. Click on the "Add" button to return to the "Chip Properties" box. The following box displays:



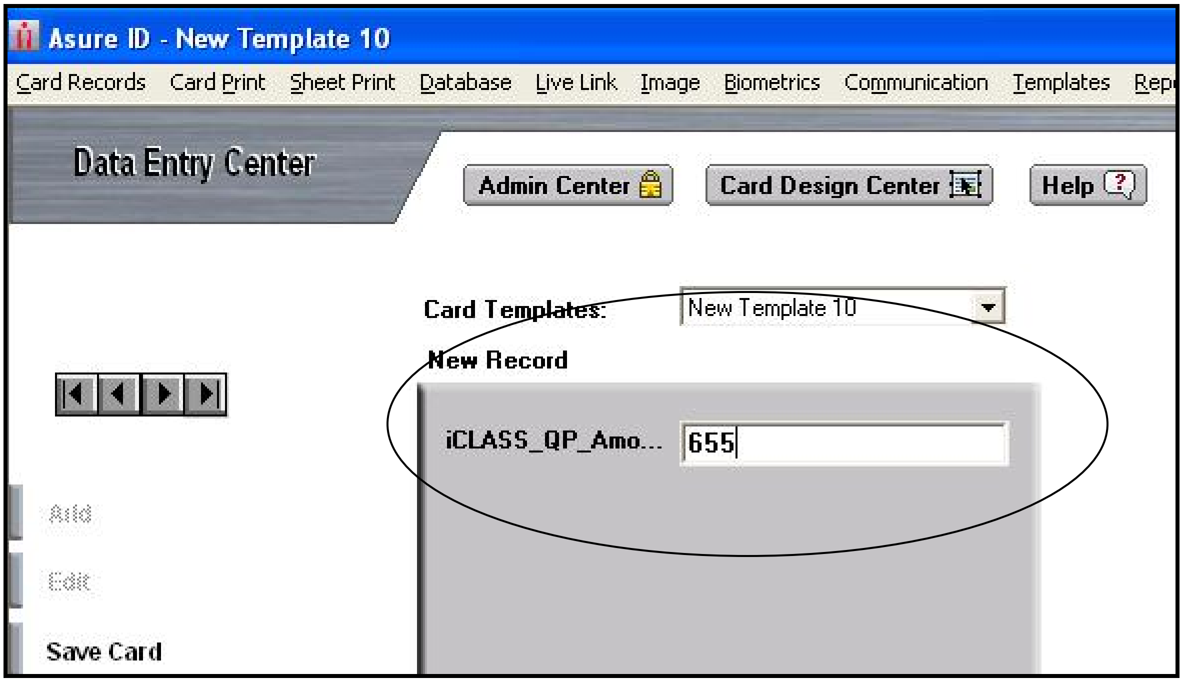
Note1: **Only** the required field (Amount) is checked off.

Note2: The Counter field in this case defaults automatically to 255 times that the card may be refilled. If you wish it to be set to another value, refer to the **Electronic Purse (QI Purse) – Required plus Optional** section of this document.

14. Click "OK" on the "Chip Properties" box. You are returned to the "Card Design Center".

15. Design and save your card. (Refer to the **Quick Start Guide – A Step by Step Tutorial** for more information about designing a card.) Once your card is designed and saved, go to the "Data Entry Center" screen.

16. Click on "Add a card". The following screen displays.



17. Enter the data in the fields where:
    - iCLASS_QP_Amount equals a numerical value from 0 (i.e., no value at all) to the maximum amount $655.00. (**Note:** The maximum character length for a value are set on the Field Properties tab of the “Data Field Options Dialog” box.)

18. Save the card.

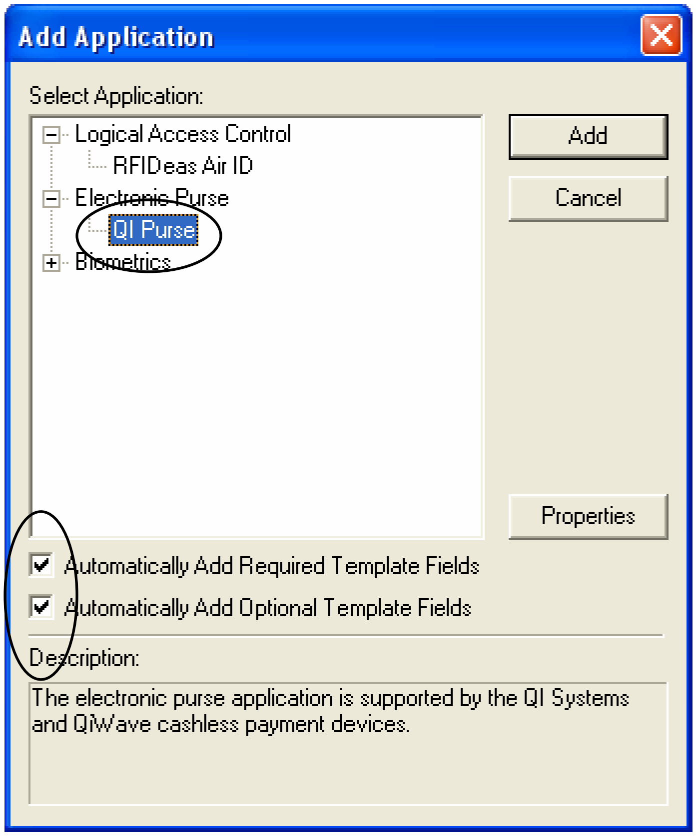
Electronic Purse (QI Purse) – Required plus Optional

This section contains the steps to take to add the Electronic Purse component to a card where both the required and optional template fields will be added to the card.

The Counter field is the optional Template field. The value of this field determines the number of times that the card can be refilled. **Example:** A card with a Counter field set to 10 can only be refilled 10 times.

Perform steps 1 – 7 from the **Electronic Purse (QI Purse) – Required** section and then continue with the steps below.

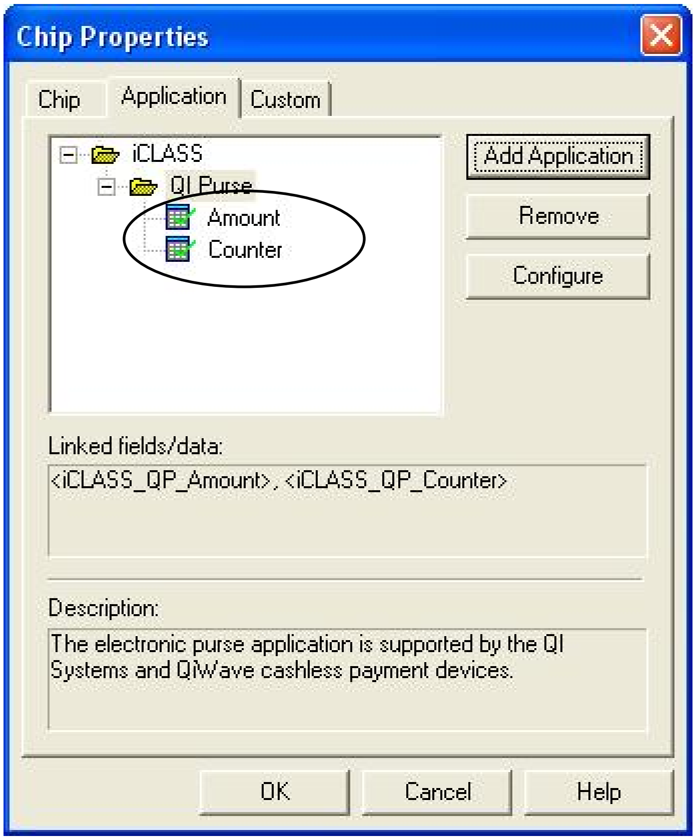
8. Click on the “Add Application” button. The “Add Application” box displays.



9. Double click on the “Electronic Purse” selection.

10. Click to highlight “QI Purse” and if required, check the box entitled “Automatically Add Optional Template Fields”.

11. Click on the “Add” button to return to the “Chip Properties” box. The following box displays:

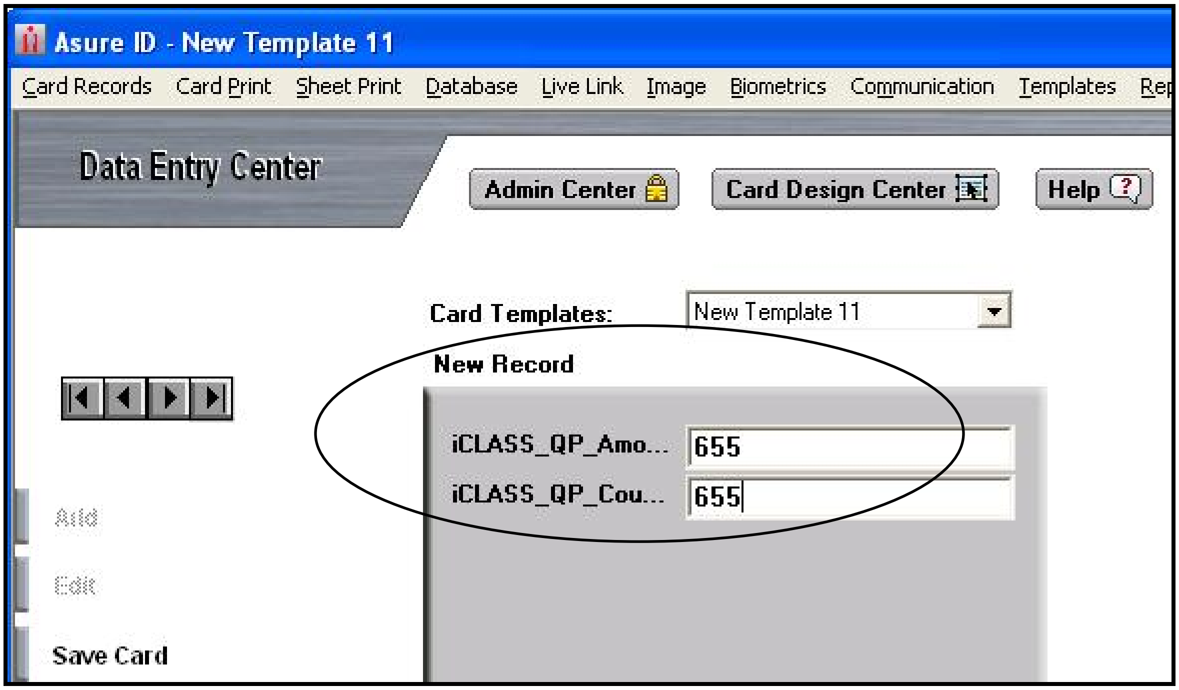


Note: **Both** the required and the optional template fields are checked off.

14. Click “OK” on the “Chip Properties” box. You are returned to the “Card Design Center”.

15. Design and save your card. (Refer to the Quick Start Guide – A Step by Step Tutorial for more information about designing a card.) Once your card is designed and saved, go to the “Data Entry Center” screen.

16. Click on “Add a card”. The following screen displays.



17. Enter the values in the fields where:
    - iCLASS_QP_Amount equals a value from nil (i.e., no value at all) to a maximum value of $655.00.
    - iCLASS_QP_Counter has a maximum value of 655. However, the value can be set from nil (i.e., no value at all) to whatever value you determine is necessary for your cards.

      Note: The maximum characters for a value are set on the Field Properties tab of the “Data Field Options Dialog” box.

18. Save the card.

Electronic Purse (QI Purse) – Customized

This section contains the steps to take to add the Electronic Purse component to a card where customized Template fields will be added to the card.

Perform steps 1 – 7 from the **Electronic Purse (QI Purse) – Required** section.

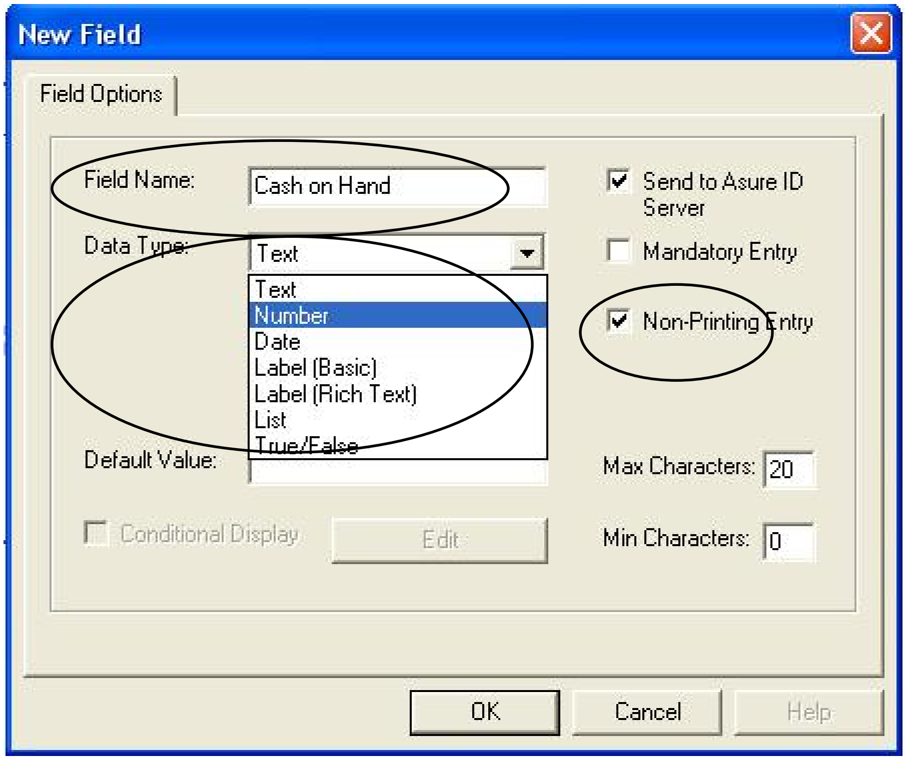
Note: After step 7, the Electronic Purse (QI Purse) template fields are being customized and only general guidance can be provided.

8. Create and Link Your Customized Fields

There are two fields associated with the Electronic Purse (QI Purse) application. They are “Amount” and “Counter”.

To customize these fields you must first create your custom data fields on your card and later link them to the fields above.

a. On the “Card Design Center” screen, click on the “Data Field” button.



b. In the “Field Name” box, enter your customized name for your field.

c. In the “Data Type” field, select the data type for your field.

d. In the “Non-Printing Entry” box, select the check mark to make the field a non-printing field. **Note:** Your field will display on the “Card Design Center” screen in the box entitled “Non-Printing Entries”.

Note: The data type for these fields is “Number”.

e. Click “OK” when you are done.

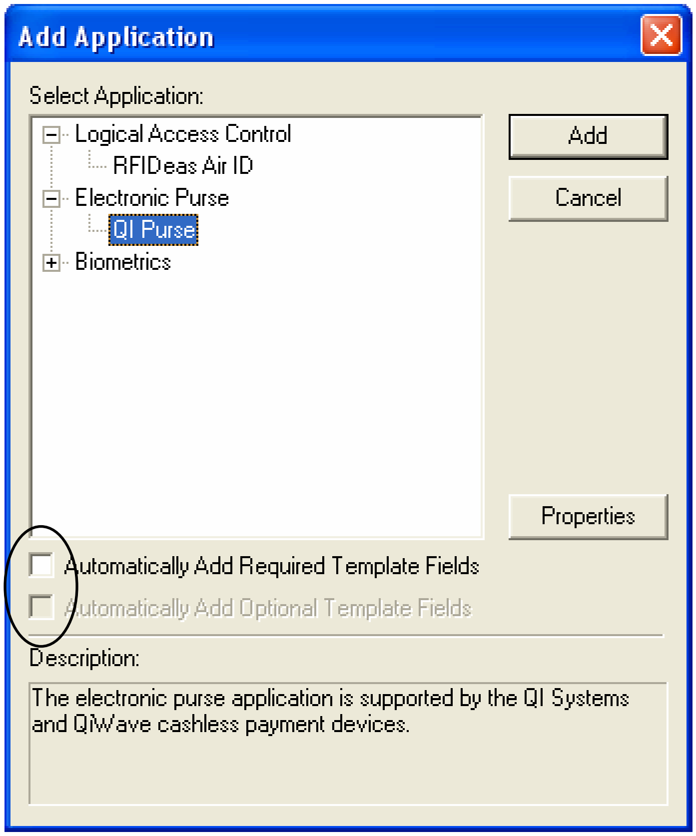
f. Repeat the steps a-e for your other customized field.

9. Add the “Electronic Purse | QI Purse Application”

In this step you have to add the “Electronic Purse (QI Purse)” application.

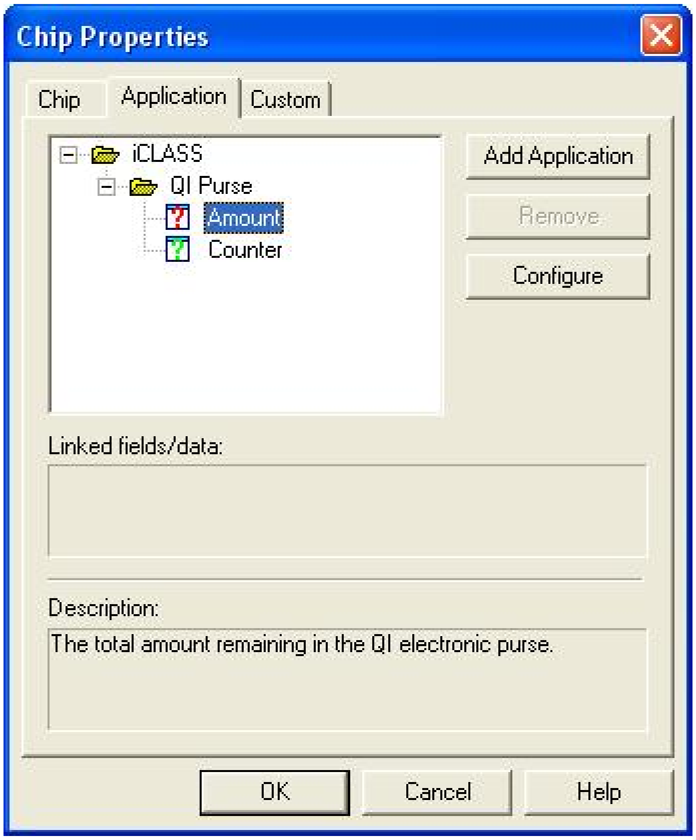
a. Click on the Chip icon located on the right hand side of the “Card Design Center” screen.

b. Click on the “Add Application” button. The “Add Application” box displays.



c. Ensure that the “Automatically Add Required Template Fields” box does not contain a check mark. Deselect it if needed.

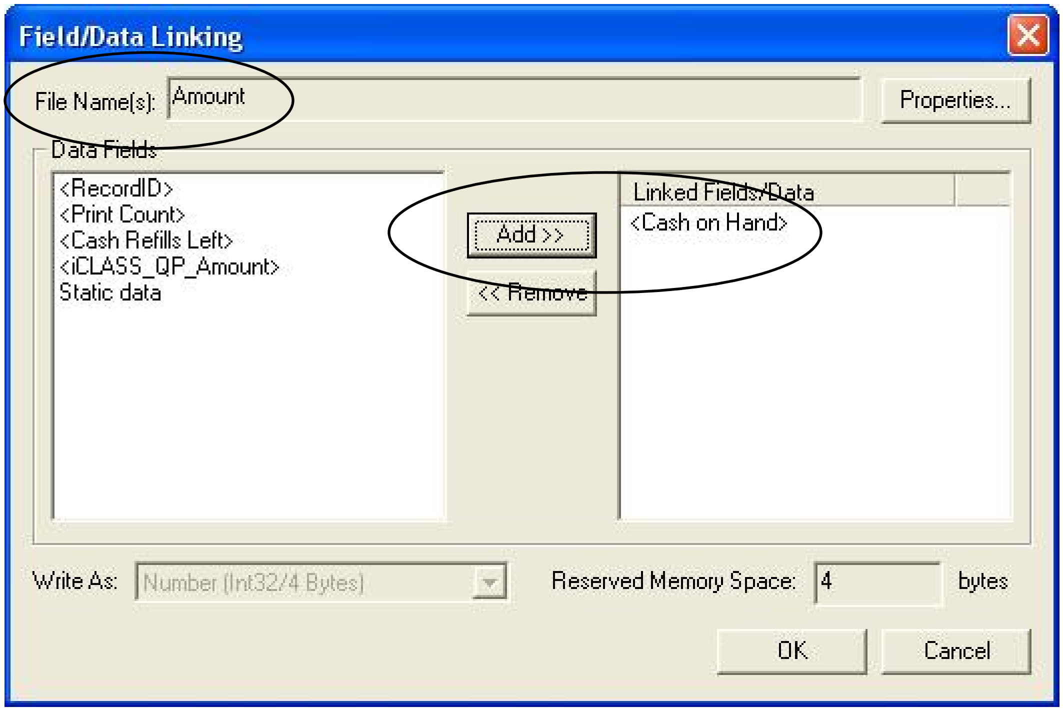
d. Click the “Add” button. The “Chip Properties” box displays.



Note1: All the fields contain a question mark. This is because you will be configuring them in a further step.

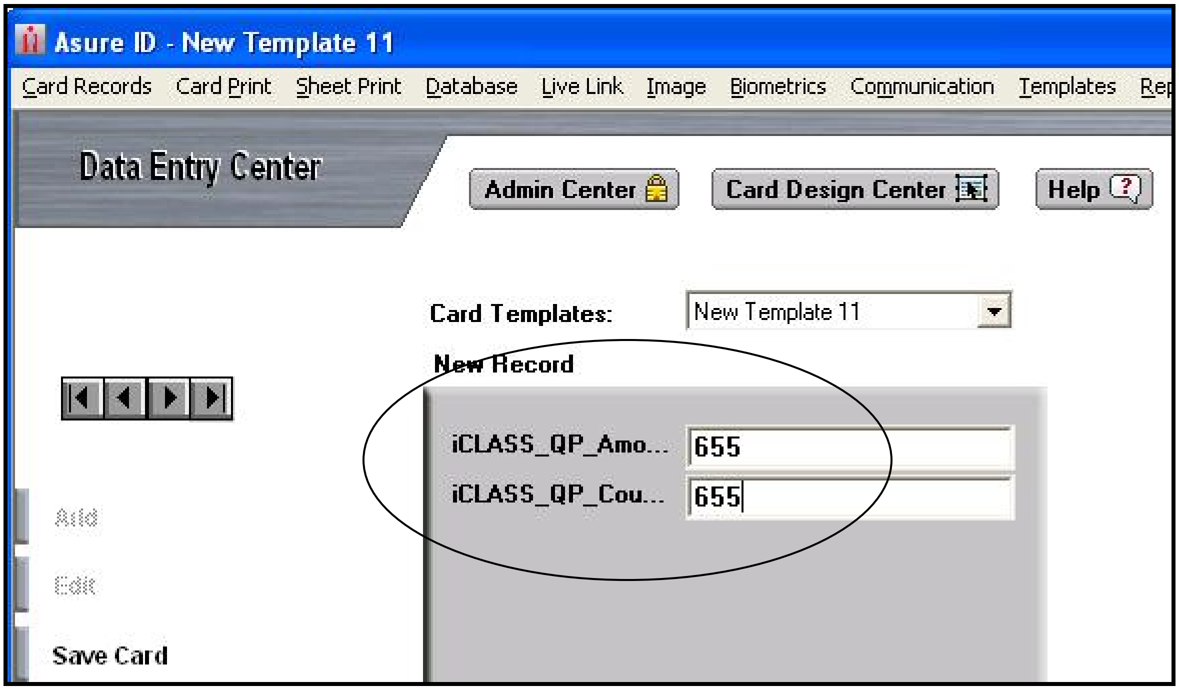
Note2: The “Amount” field contains a red question mark because it represents the required fields of the QI Purse application.
The “Counter” field contains a green question mark because it represents the optional field of the application.

e. Highlight the first field to be configured and click on the “Configure” button. The “Field/Data Linking” box displays.



f. Link the QI Purse fields to your created fields (e.g., Cash on Hand to Amount).

g. Once your card is designed and saved, go to the “Data Entry Center” screen. Click on the “Add Card” selection. The following screen displays.



h. Enter the values in the fields where:

"Your custom field 1" (i.e., "Cash on Hand" in the screen above) equals the value you set for your cards to a maximum of $655.00.

Note: The values for this field are expressed only in dollars. Value 1 = $1.00 Value 655 = $655.00.

"Your custom field 2" (i.e., "Refills" in the screen above) equals the value you set for your cards to a maximum of 655 times.

i. Save the card.

Biometrics (Bioscrypt Fingerprint) – Required

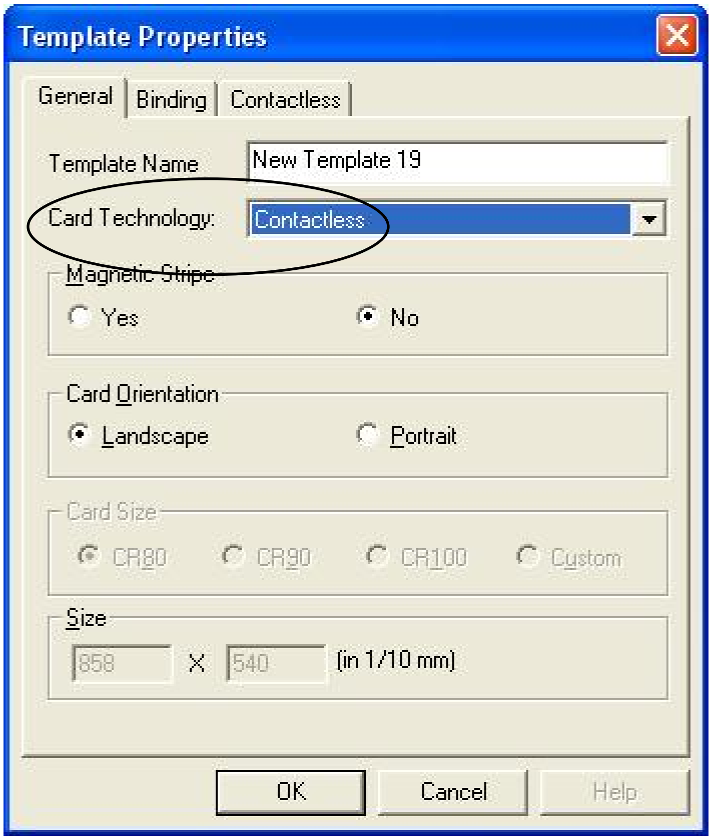
This section contains the steps to take to add the Biometrics component to a card where only the Required Template fields will be added to the card.

1. Logon to Asure ID.

2. Go to "Card Design Center" (CDC).

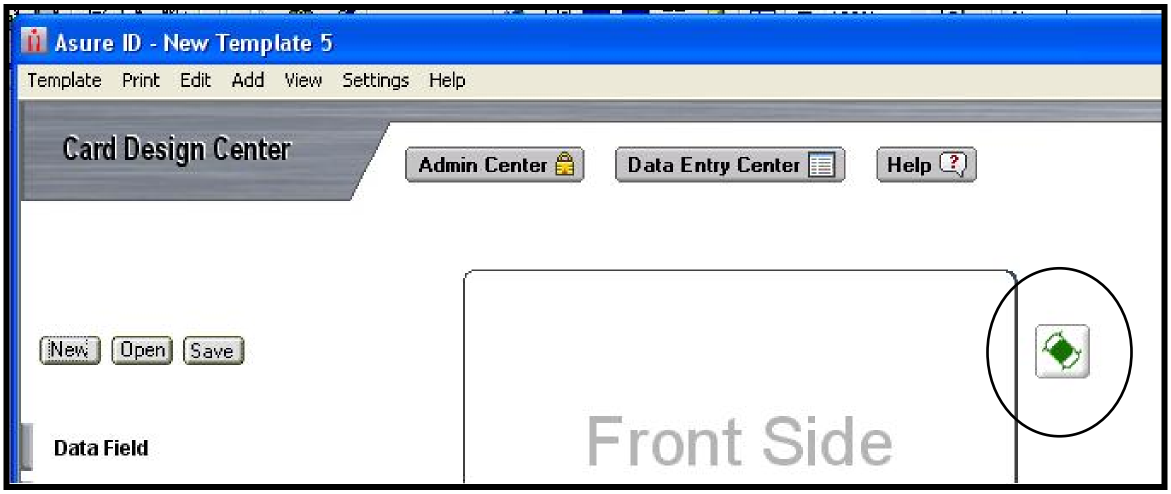
3. Click on the "New" button located in the top left quadrant of the screen.

The "Template Properties" screen displays:



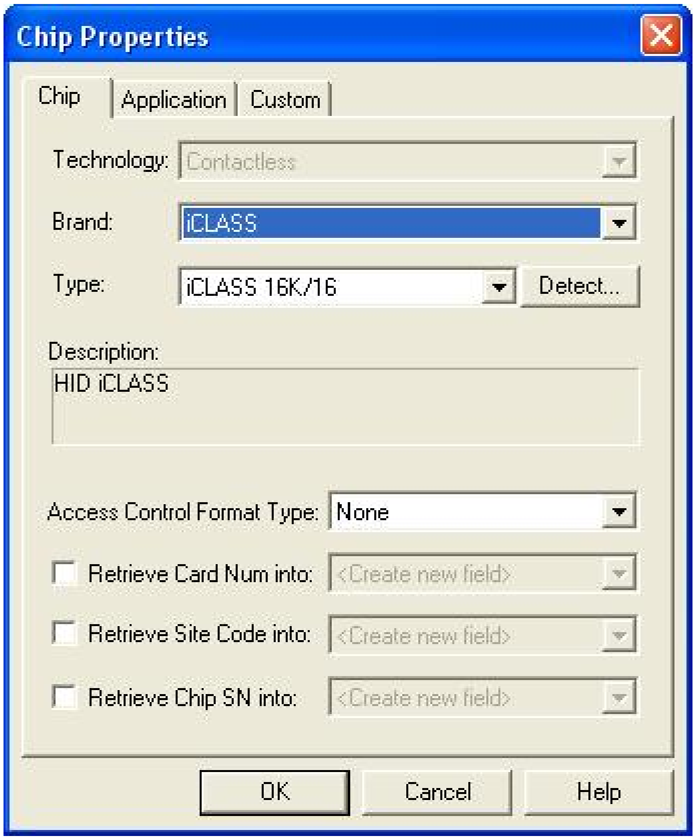
4. From the drop down menu under the "Card Technology field" select "Contactless"

5. Click “OK” to return to the “Card Design Center” screen. A chip icon now appears to the right of the “Front Side” of the card.



6. Click on the “Chip Icon”. The “Chip Properties” box displays.

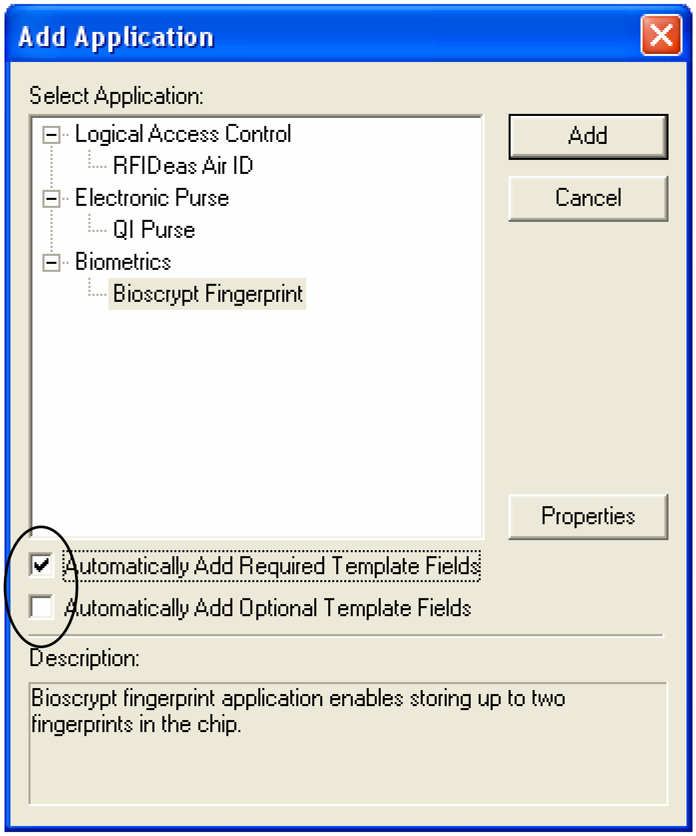
7. Ensure that the Brand and Type fields reflect the correct values for your “Technology Contactless” cards. Refer to section “Card Brand and Type” for more information.



8. Select the Application Tab of the properties box.

9. Highlight the iClass folder.

10. Click on the “Add Application” button. The “Add Application” box displays.

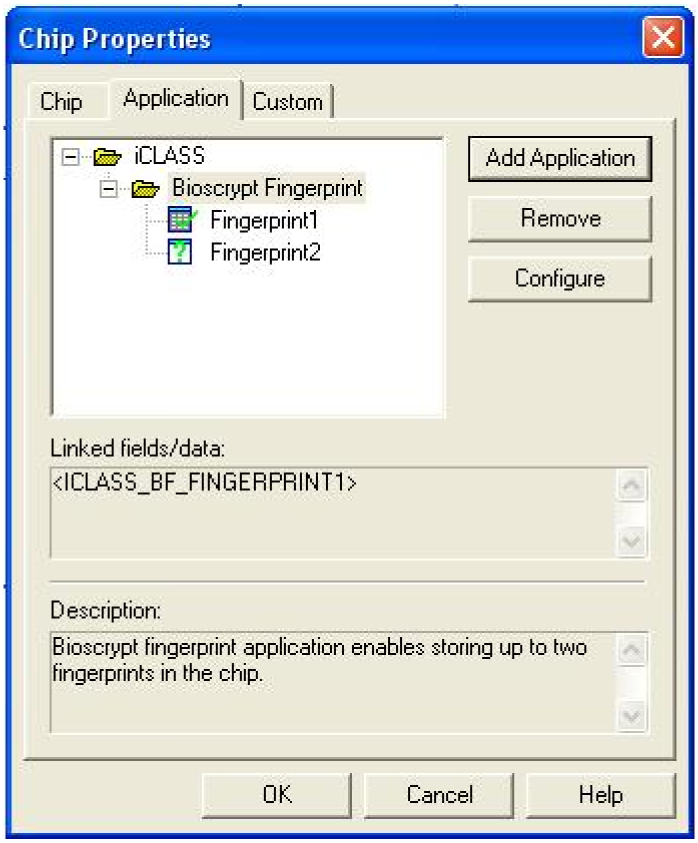


Note: Ensure that **only** the "Automatically Add Required Template Fields" box contains a check mark.

11. Double click on the "Biometrics" selection.

12. Click to highlight "Bioscrypt Fingerprint".

13. Click on the "Add" button to go to the "Chip Properties" box. The following box displays:

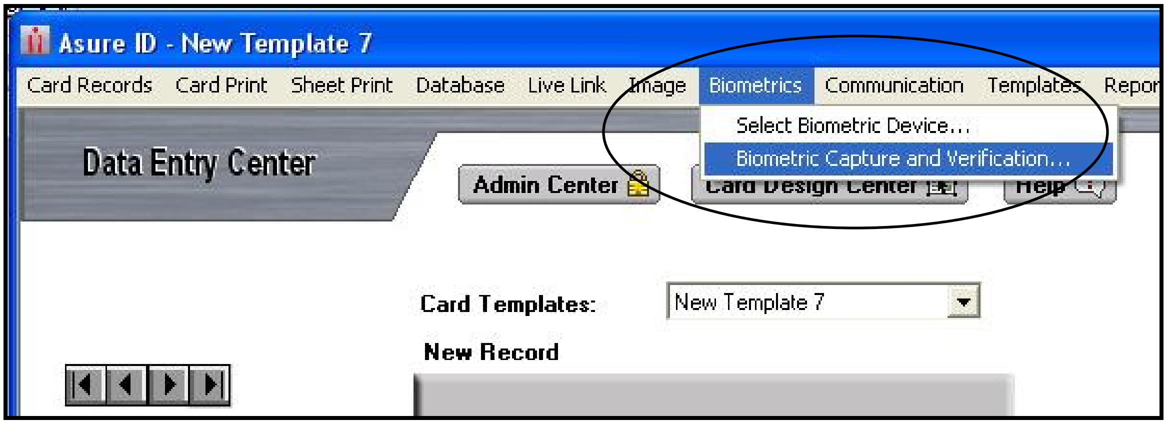


Note: **Only** the required field (Fingerprint1) is checked off.

14. Click "OK" on the "Chip Properties" box. You are returned to the "Card Design Center".

15. Design and save your card. (Refer to the "Quick Start Guide – A Step by Step Tutorial" for more information about designing a card.) Once your card is designed and saved, go to the "Data Entry Center" screen.

16. Click on “Add Card”. The following screen displays.



17. Click “Biometrics” on the menu bar.

18. Click “Biometric Capture and Verification…”.
    Note: Ensure your capture device is installed and ready.

19. Capture the Fingerprint using your capture device. When you are done return to the “Data Entry Center” screen.
    Note: For more information on capturing fingerprints refer to the Section “Capture, Load, or Verify Biometrics”.

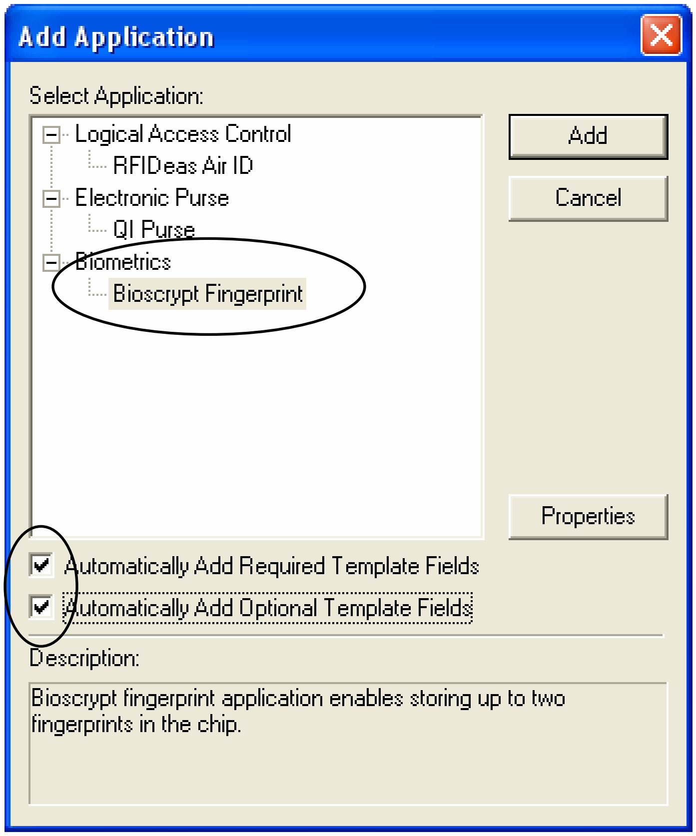
20. Save the card.

Biometrics (Bioscrypt Fingerprint) – Required plus Optional

This section contains the steps to take to add the Biometrics component to a card where both the required and optional template fields will be added to the card.

Perform steps 1 – 9 from the **Biometrics (Bioscrypt Fingerprint) – Required** section and then continue with the steps below.

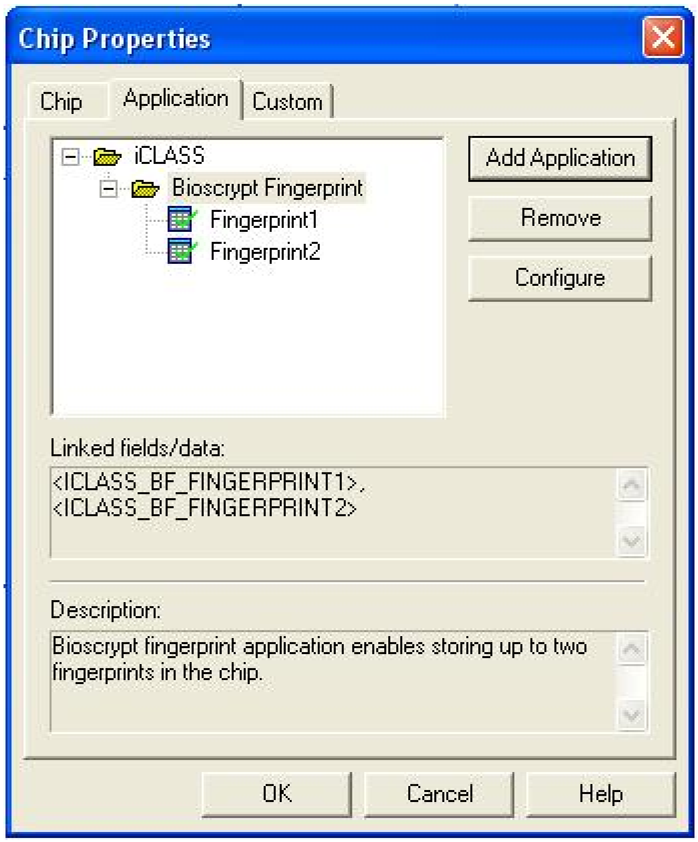
10. Click on the “Add Application” button. The “Add Application” box displays.



11. Double click on the Biometrics selection.

12. Click to highlight “Bioscrypt Fingerprint” and if required, check the box entitled “Automatically Add Optional Template Fields”.

13. Click on the “Add” button to return to the “Chip Properties” box. The following box displays:

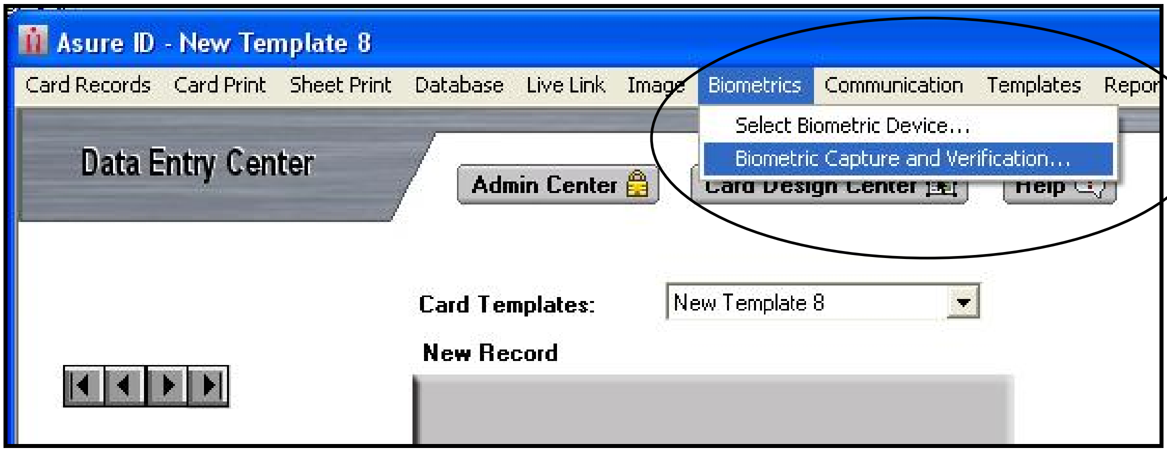


Note: **Both** the required and the optional template fields are checked off.

14. Click “OK” on the “Chip Properties” box. You are returned to the “Card Design Center”.

15. Design and save your card. (Refer to the Quick Start Guide – A Step by Step Tutorial for more information about designing a card.) Once your card is designed and saved, go to the “Data Entry Center” screen.

16. Click on “Add Card”. The following screen displays.



17. Click “Biometrics” on the menu bar.

18. Click “Biometric Capture and Verification…”.
    Note: Ensure your capture device is installed and ready.

19. Capture the Fingerprint using your capture device. When you are done return to the “Data Entry Center” screen.
    Note: For more information on capturing fingerprints refer to the Section “Capture, Load, or Verify Biometrics”.

20. Save the card.

Biometrics (Bioscrypt Fingerprint) – Customized

This section contains the steps to take to add the Biometrics component to a card where customized Template fields will be added to the card.

Perform steps 1 – 7 from the **Biometrics (Bioscrypt Fingerprint) – Required** section.

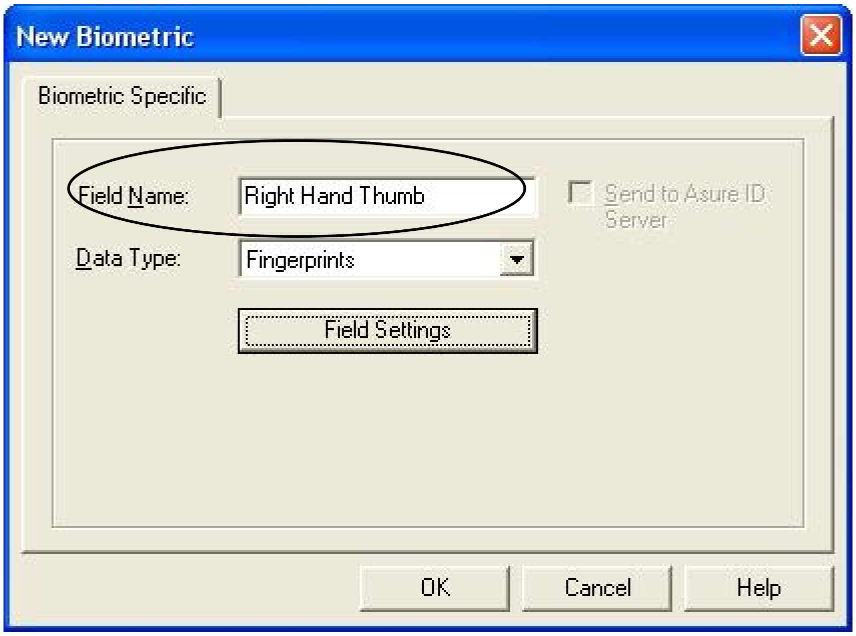
Note: After step 7, the Biometrics (Bioscrypt Fingerprint) template fields are being customized and only general guidance can be provided.

8. Create and Link Your Customized Fields

There are two fields associated with the “Biometrics (Bioscrypt Fingerprint)” application. They are “Fingerprint1” and “Fingerprint2”.

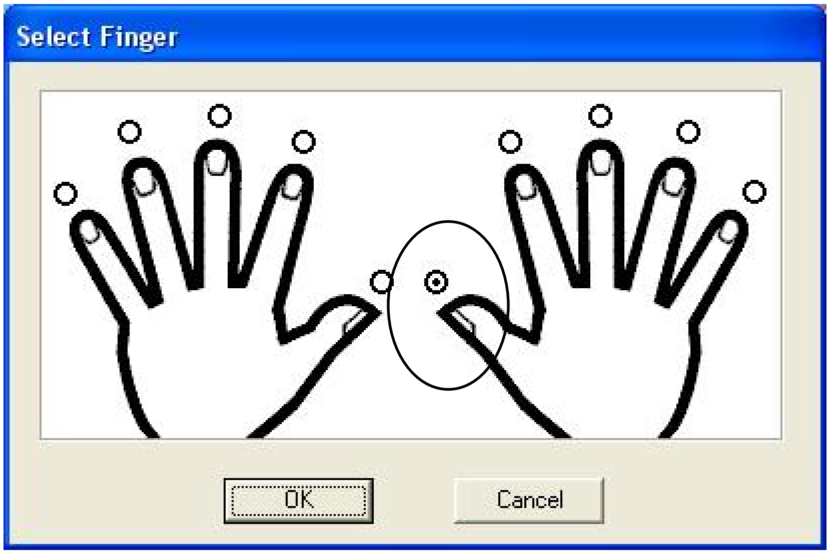
To customize these fields you must first create your custom data fields on your card and later link them to the fields above.

a. On the “Card Design Center” screen, click on the “Biometrics” button (located on the left hand side of the screen). The following screen displays.



b. In the “Field Name” box, enter your customized name for your field (e.g., Right Hand Thumb).

c. Click on the “Field Settings” button and the following screen displays. This is the step where you can select the finger you want to read via your card reader device.



Note1: The default setting for the “Select Finger” box is the right index finger.

Note2: For this procedure the right hand thumb has been selected.

d. Click "OK" to save your selection.

Note: Biometric fields default to "Non-Printing" fields.

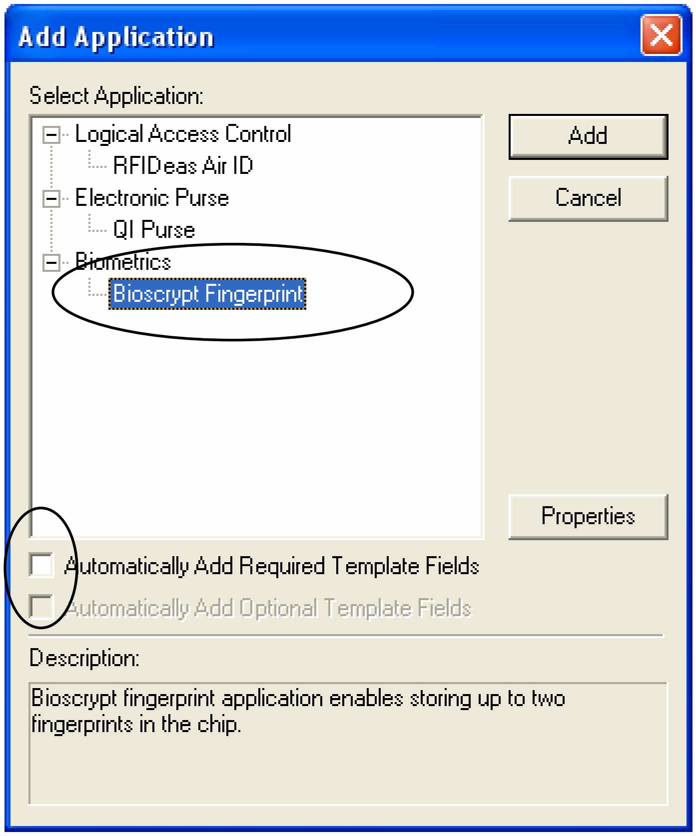
e. Repeat the steps a-d for the other customized field.

9. Add the "Biometrics | Bioscrypt Fingerprint"

In this step you have to add the "Biometrics (Bioscrypt Fingerprint)" application.

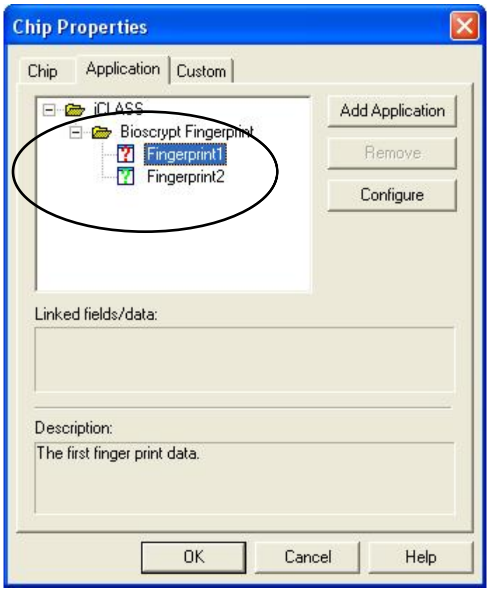
a. Click on the Chip icon located on the right hand side of the "Card Design Center" screen.

b. Click on the "Add Application" button. The "Add Application" box displays.



c. Ensure that the “Automatically Add Required Template Fields” box does not contain a check mark. Deselect it if needed.

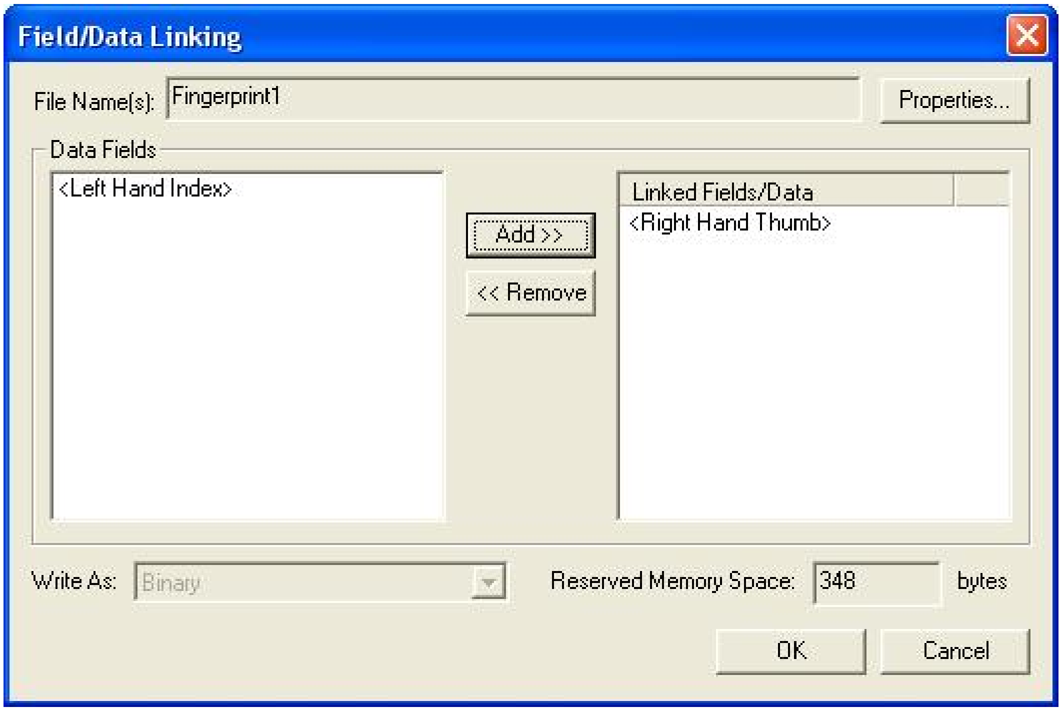
d. Click the “Add” button. The “Chip Properties” box displays.



Note1: All the fields contain a question mark. This is because you will be configuring them in a further step.

Note2: The “Fingerprint1” field contains a red question mark because it represents the required fields of the “Bioscrypt” application.
The “Fingerprint2” field contains a green question mark because it represents the optional field of the application.

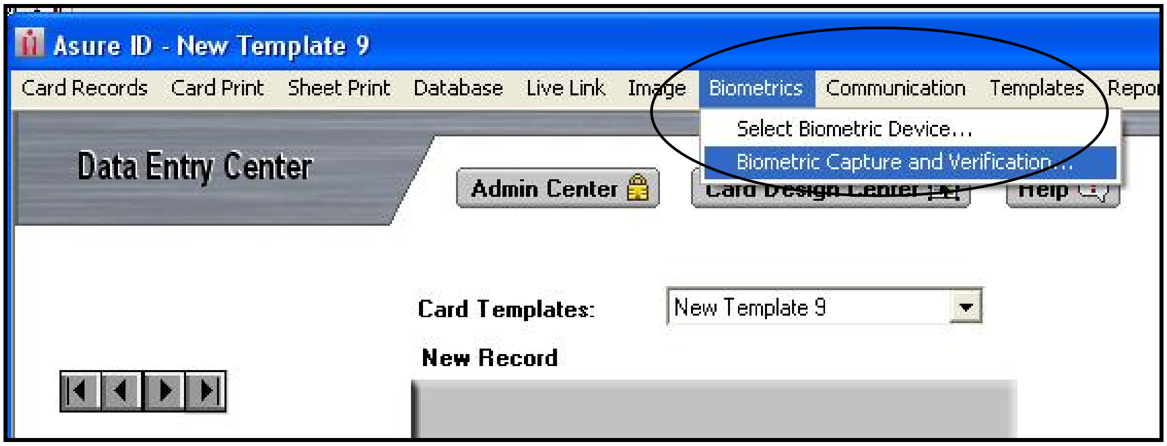
e. Highlight the first field to be configured and click on the Configure button. The “Field/Data Linking” box displays.



f. Link the Bioscrypt fingerprint fields to your created fields (e.g., Right Hand Thumb to Fingerprint1).

g. Once your card is designed and saved, go to the “Data Entry Center” screen and click “Add” from the right hand screen.

h. Select “Biometrics” from the Menu Bar. The following displays.



i. Click “Biometric Capture and Verification…”.
   Note: Ensure your capture device is installed and ready.

j. Capture the Fingerprint using your capture device. When you are done return to the “Data Entry Center” screen.
   Note: For more information on capturing fingerprints refer to the Section “Capture, Load, or Verify Biometrics”.

k. Save the card.

Capture, Load, or Verify Biometrics

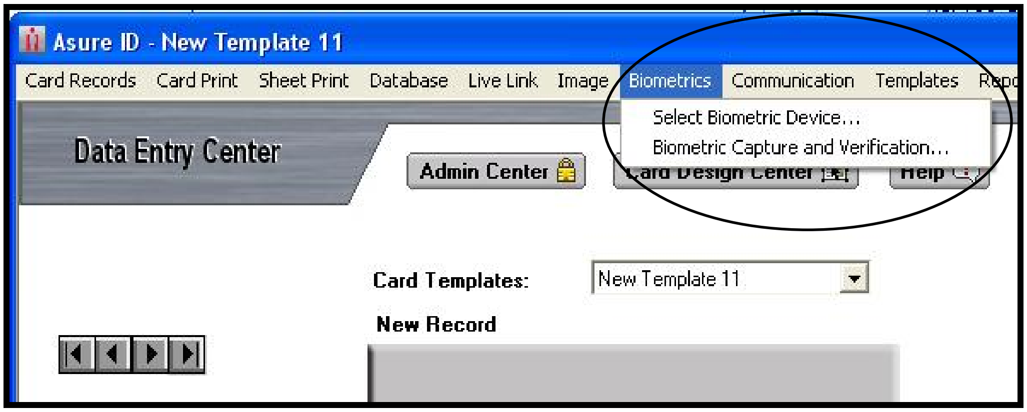
This section contains the steps to capture, load or verify biometrics to a card.

Selecting the Biometric Device

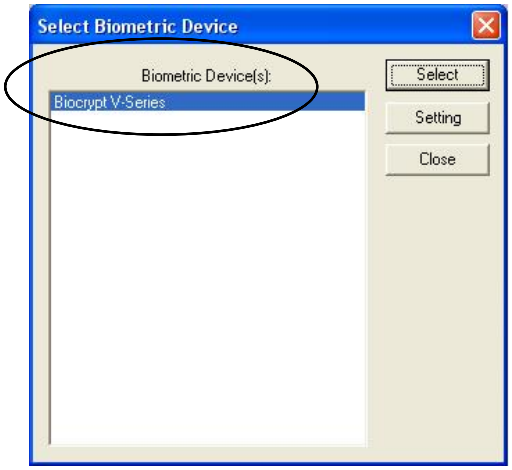
Before you perform the capture, load or verify steps, you must ensure that the biometrics device is selected.

1. Open the “Data Entry Center”.

2. Click on the “Biometrics” selection on the menu bar. The following selections display:

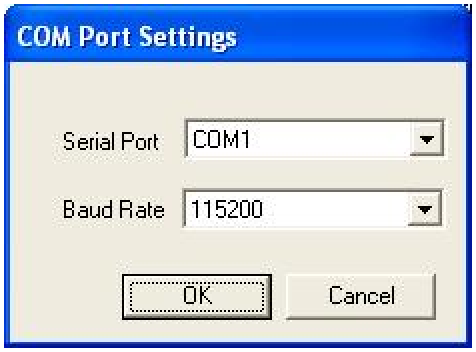


3. Click the “Select Biometric Device…” selection and the following screen displays:



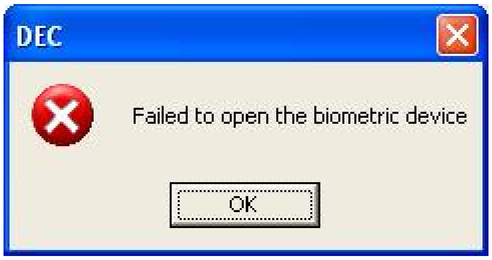
4. If there is more than one device listed, highlight the device you are going to use to perform your task (e.g., capture fingerprints).

5. If you want to confirm or change your device settings click the “Setting” button. The following screen displays:



Field Name	Description
Serial Port	Use the drop down menu to choose the serial port as per the requirements of your system (e.g., COM1).
Baud Rate	Use the drop down menu to choose the baud rate as per the requirements of your system (e.g., 115200, 57600).

Note: If you have no device connected, you will receive the following message:



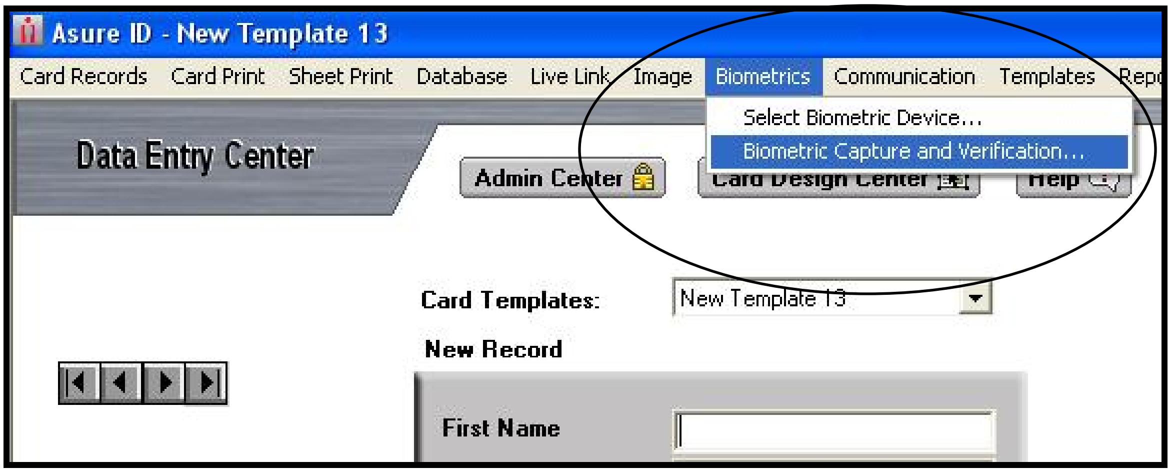
6. Once you have confirmed or changed your settings, click on the “Select” button to select the device. The following dialog box displays.

Your device is ready to capture biometrics.

Capturing Biometrics

Use this procedure to capture Employee fingerprints. This procedure requires interaction by the Employee (i.e., the person who will be using the card). To ensure you capture a fingerprint that is readable, it is recommended that you verify the print after it has been captured while the Employee is still present with you.

1. Open the “Data Entry Center”.

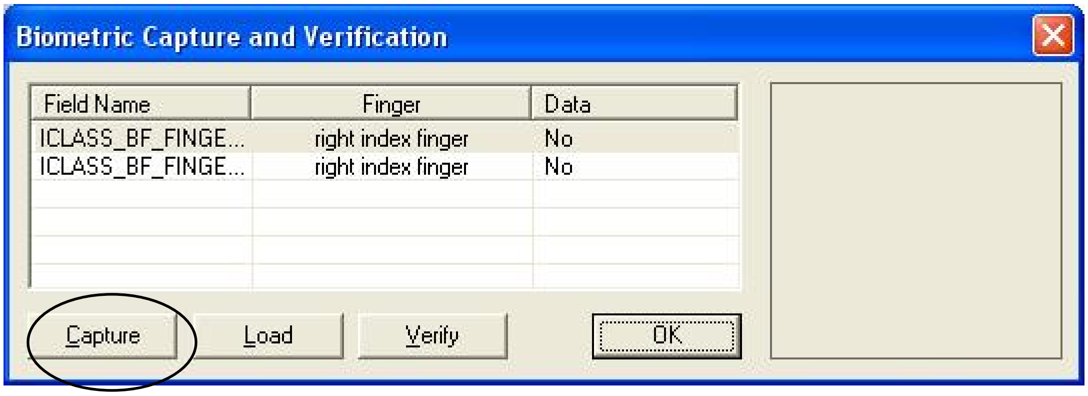


2. Select the “Card Template” from the drop down menu.

3. Select the “Record” for the Employee using the right and left arrow keys and click “Add Card” for a new record or “Edit Card” for an existing card.

4. Click “Biometrics” from the menu bar.

5. Click the “Biometric Capture and Verification...” selection and the following dialog box displays:



6. Highlight the “Field Name” to be captured and click on the “Capture” button. The following dialog box displays:

Note: The message will change depending on the fingerprint to be collected.

7. Have the Employee place the selected digit (e.g., right index finger) on the capture device.

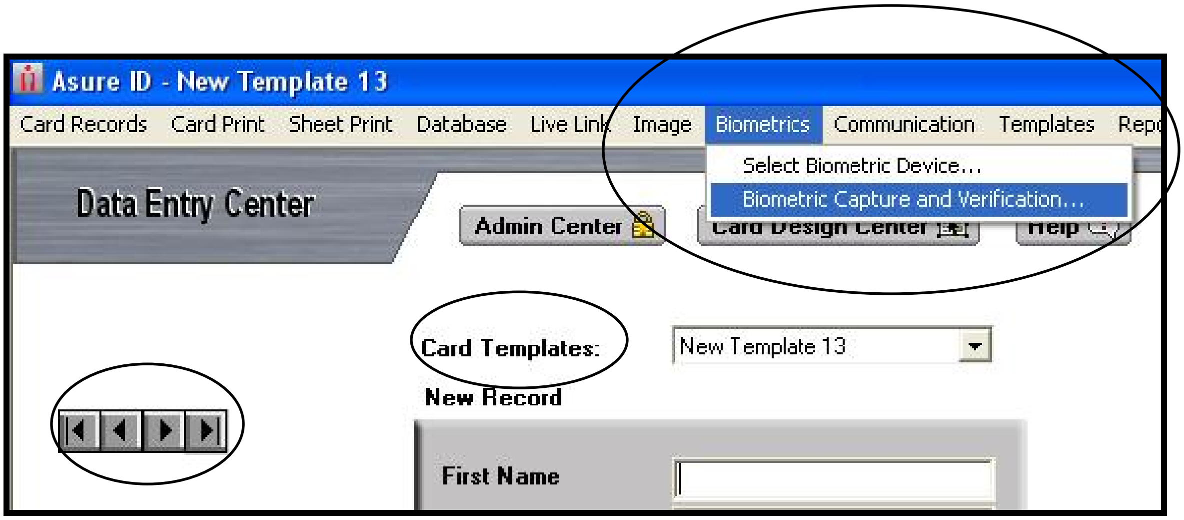
8. Click “OK”. The device captures the print and inserts it into the box at the right of the dialog box.

9. Click the “Capture” button to obtain the fingerprint again or click “OK” to exit the dialog box.

Note: It is recommended that you verify the print while the Employee is still present. See the next subtopic below for instructions on how to verify a captured fingerprint.

Verifying Biometrics

1. Open the “Data Entry Center”.

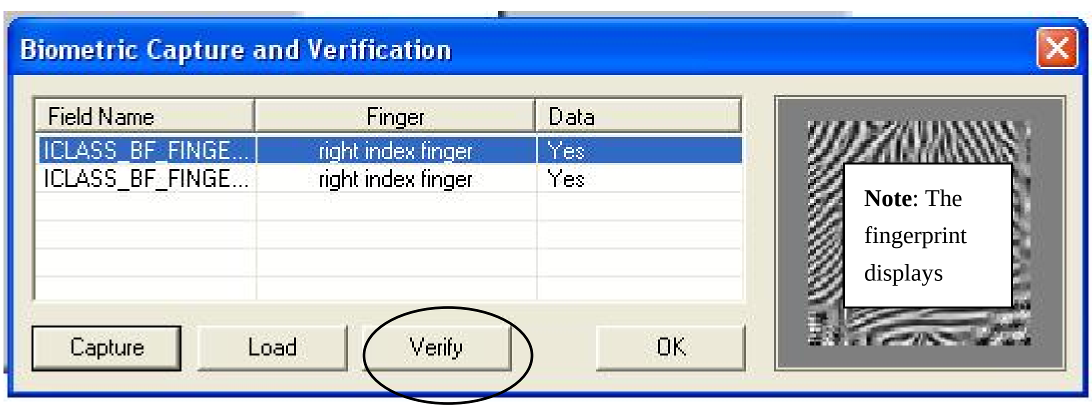


2. Select the “Card Template” from the drop down menu.

3. Select the “Record” for the Employee using the right and left arrow keys.

4. Click “Biometrics” from the menu bar.

5. Click the “Biometric Capture and Verification...” selection and the following dialog box displays:



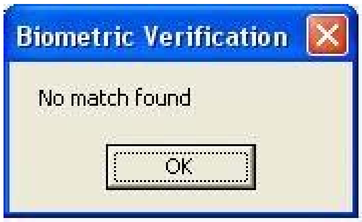
6. Highlight the “Field Name” to be captured and click on the “Verify” button. The following dialog box displays:

7. Have the Employee place their finger on the capture device.

8. Click “OK”. The device verifies the print to the one that was previously captured.

   If the prints match the following dialog box displays:

   If the prints do not match the following dialog box displays:



9. Click OK to exit either of the dialog boxes.

Note: Where no match is found, do the following:

- Check that the template and record are correct.

  If they are **not correct** then open the correct template and record and retry the verification.

  If they are **correct** then the capture may not have taken well. Capture the fingerprint again.

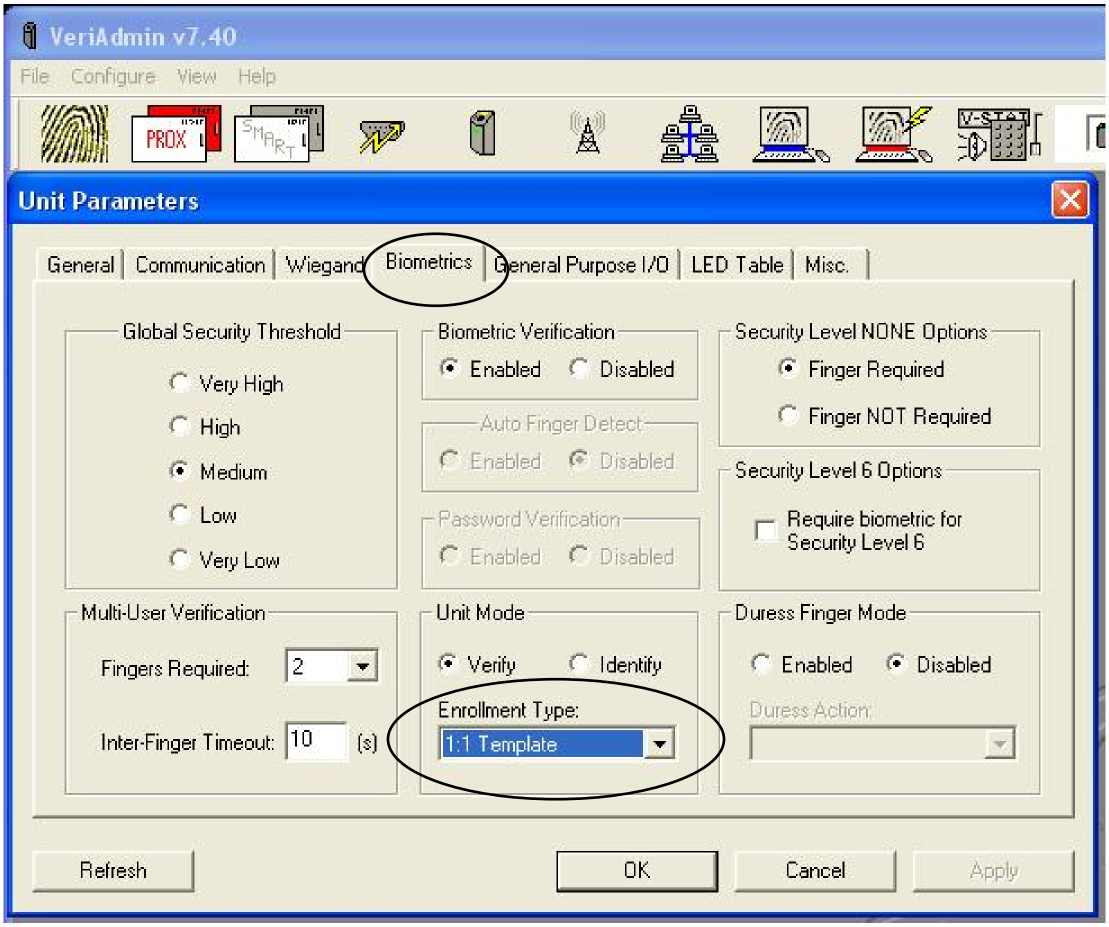
10. Click “OK” to exit the “Biometric Capture and Verification” dialog box.

Loading Biometrics

Use this procedure to load Employee fingerprints to their records. **Example:** You can use the Load feature if you have a database that already contains the fingerprints of your Employees and you now wish to link them to their Asure ID card as a biometric. **Note:** Each fingerprint will have to be individually loaded to each Employee record.

Before you begin:

Ensure that your V-Series Bioscrypt fingerprint scanner device has the following field value set i.e., “Enrollment Type:” = 1:1 Template. See the screen capture below for an illustration.

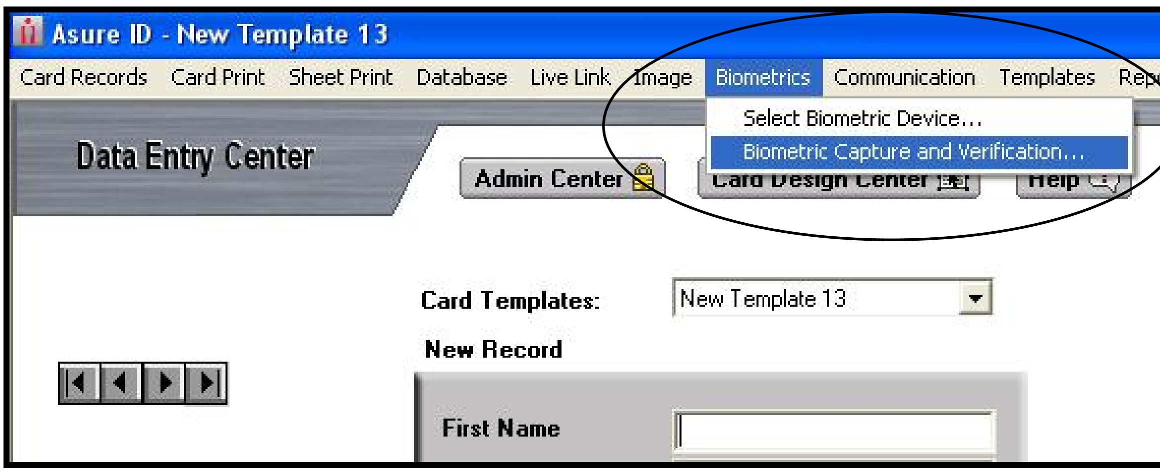


The Procedure

1. Open the “Data Entry Center”.

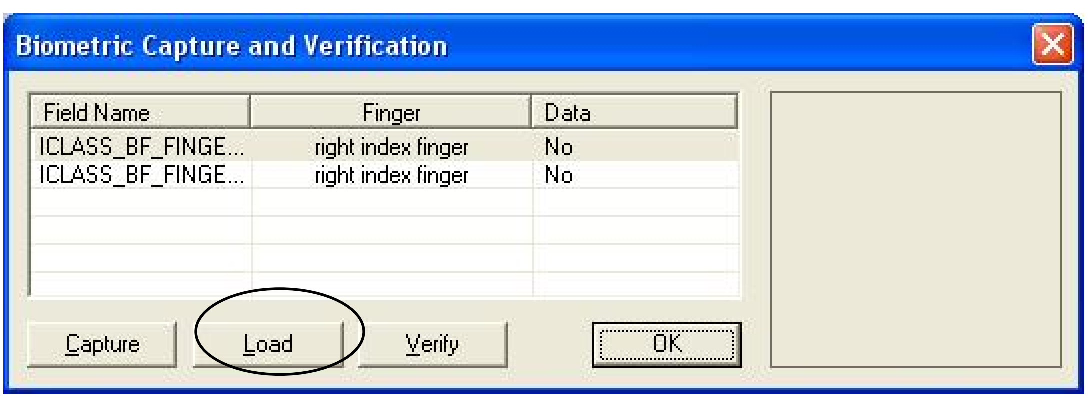
2. Open the Template and Record for the first Employee for whom you are adding a fingerprint.

3. Click on the “Add Card” button.

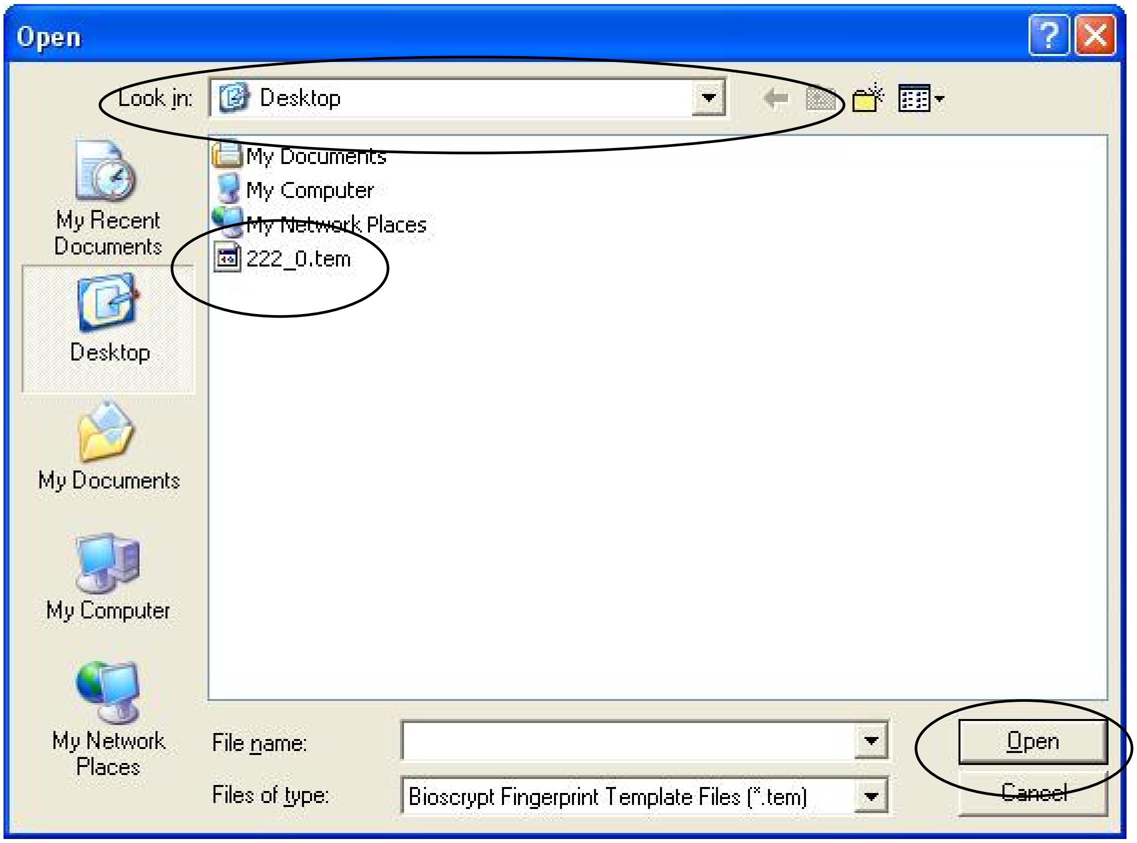


4. Click “Biometrics” from the menu bar.

5. Click the “Biometric Capture and Verification...” selection and the following dialog box displays:



6. Highlight the “Field Name” to be captured and click on the “Load” button. The following dialog box displays:



7. Locate the directory where the .tem files are located.

8. Highlight the .tem file you want to add to your record and click on the “Open” button OR double click the file. The fingerprint displays on the “Biometric Capture and Verification” dialog box.

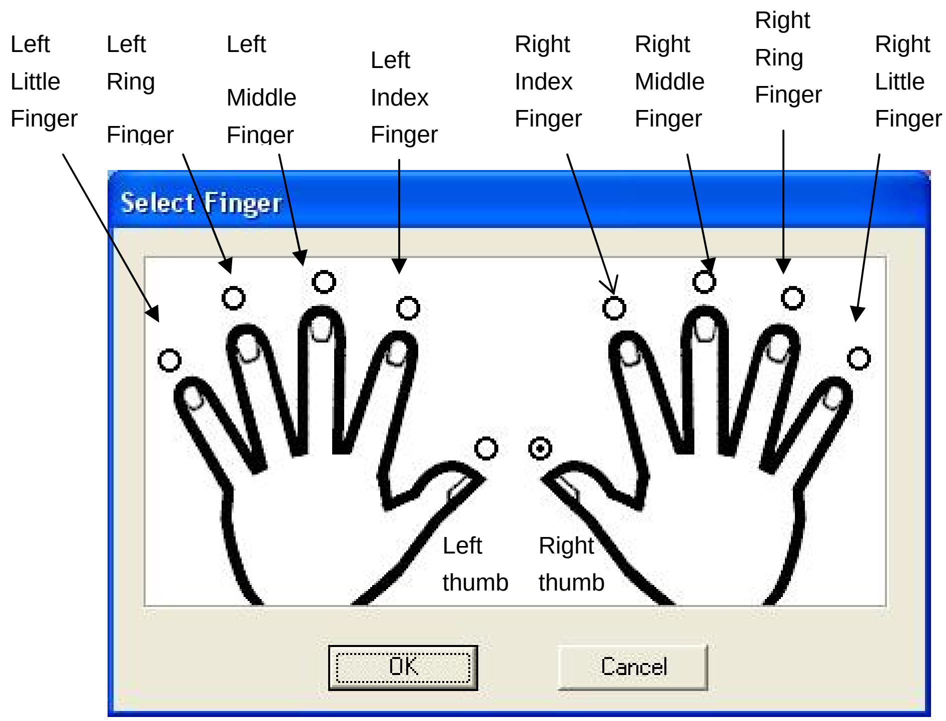
9. Click “OK” on the dialog box.

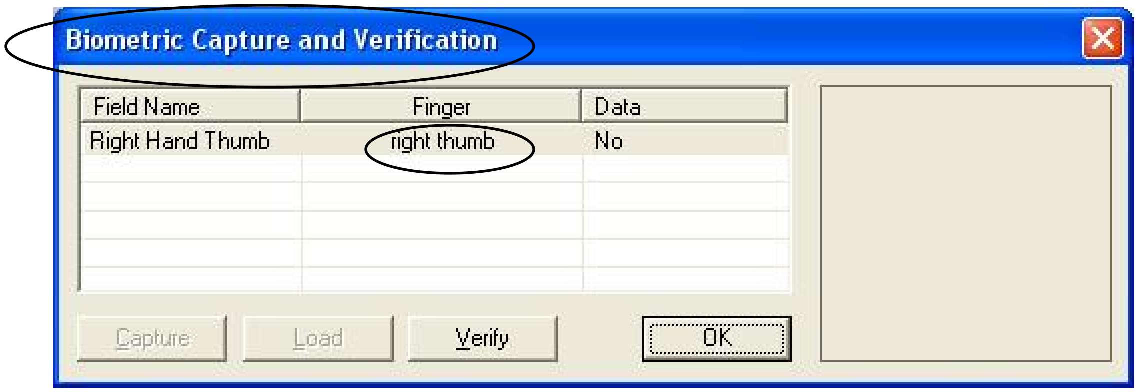
10. Choose the next Record in the Template in the DEC and repeat procedure steps two through nine (2 – 9) for each of the Employee fingerprints you wish to load.

System Names of Fingerprints Displayed on Select Finger Screen

The following diagrams illustrate the system names for each biometric. These names are listed under the “Finger” column of the “Biometric Capture and Verification” Screen. Refer to the sample illustration of this screen further below.

Note: The “Select Finger” screen defaults to the right index finger until you select a finger and click “OK”.





Chip Properties - Custom Tab

Custom data can be configured using the “Custom” tab of the “Chip Properties” box.
This type of configuration allows you to configure and add your own data along with one or more of the pre-defined iDIRECTOR applications (e.g., RFIDeas, QI Purse, Bioscrypt Fingerprints). The limitation of what you can add is dependent on the type of card you use (e.g., iCLASS 2K/2, iCLASS 16K/2, iCLASS 16K/16) and the size of the data you wish to add.

CAUTION: It is highly recommended that technical staff with smart card knowledge provide the necessary configuration support when working with the Custom Tab of the Chip Properties box.

Note: If the required technical knowledge is not available in-house then HID Identity’s Professional Services are available to provide the level of expertise required.

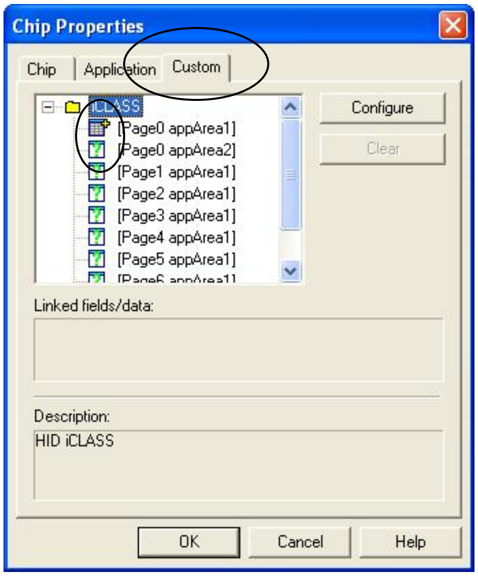
Because the use of this feature is dependent on what data is being added to the card chip, only general guidance can be provided for this section.

Procedure to call up the Custom Tab of the Chip Properties Box

1. Create a “contactless” card in the “Card Design Center”. A chip icon will appear to the right hand side of the card.

2. Double click on the chip icon to open the “Chip Properties” box.

3. Click once on the “Custom” tab to open it. The following screen displays:



Legend:

- •The icon with the plus symbol signifies a configured file (i.e., one that is already in use).
- •The icon with the green question mark signifies that a file can be configured (i.e., one that is not in use). Once configured the question mark icon disappears and a check mark icon displays.

Note:By default, Page0 appArea1 is reserved for the HID access control format.

Procedure to configure a Page and appArea.

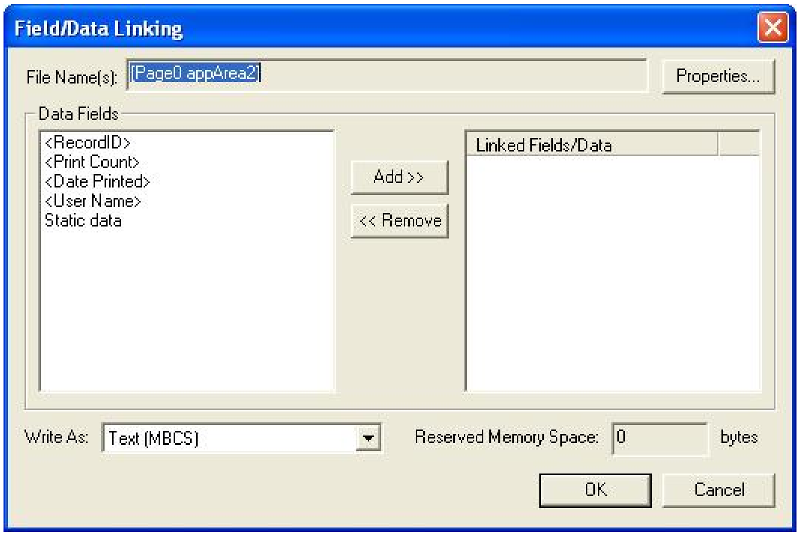
IMPORTANT: If you are configuring files within the custom tab and you wish to also add other applications, please note that an application may require a defined space. Example: Electronic Purse requires a specific location on the Memory map in order to function.

1. Add to your card template the fields that you want to encode to the card. These can be printing and non-printing fields.

2. Design and save your card template.

3. Open the “Chip Properties” box and click on the “Custom” tab.

4. Select the file (i.e.,) that you wish to configure.



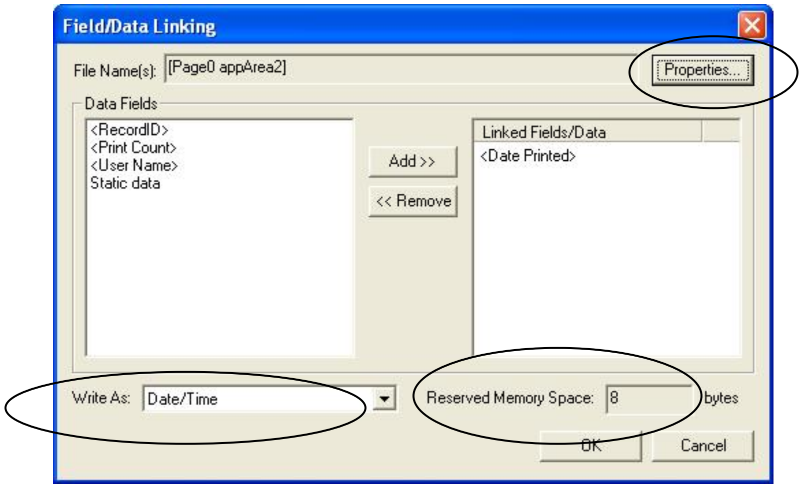
5. Click on the field you wish to add in the "Data Fields" column and then click the "Add>>" button to move that field to the "Linked Fields/Data" column.

IMPORTANT: If you wish to add another field into the same file it must be compatible with the parameters of the first field selected (e.g., .date/time requires that any subsequent fields are date/time fields as well).

6. Click the down arrow for the "Write As:" field to select the type of information being configured in the field. The value you select is dependent on the data field you add to the "Linked Fields/Data" column.

"Write As:" Field Value	Comments
Text	Text refers to alpha characters and integer numbers.
Number	Number refers to integer numbers.
Float	Float refers to decimal numbers.
Date/Time	Refers to values of date and time.
Image	Image refers to pictures in jpg format.
Binary	Binary refers to any binary including bioscrypt.

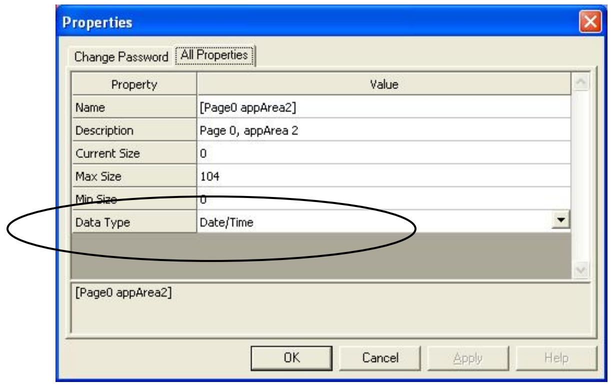
Example: Using the screen below, if you add "<Date Printed> "to the "Linked Fields/Data" column, then you would select "Date/Time" as the value for the "Write As:" field. **Note:** In some cases the value of the "Write As:" field defaults to the value required for a field.



Note1: Using the example above, if you try to add another field to the above screen, it must also be a “Date/Time” field or data. Other wise, the following error message will display:

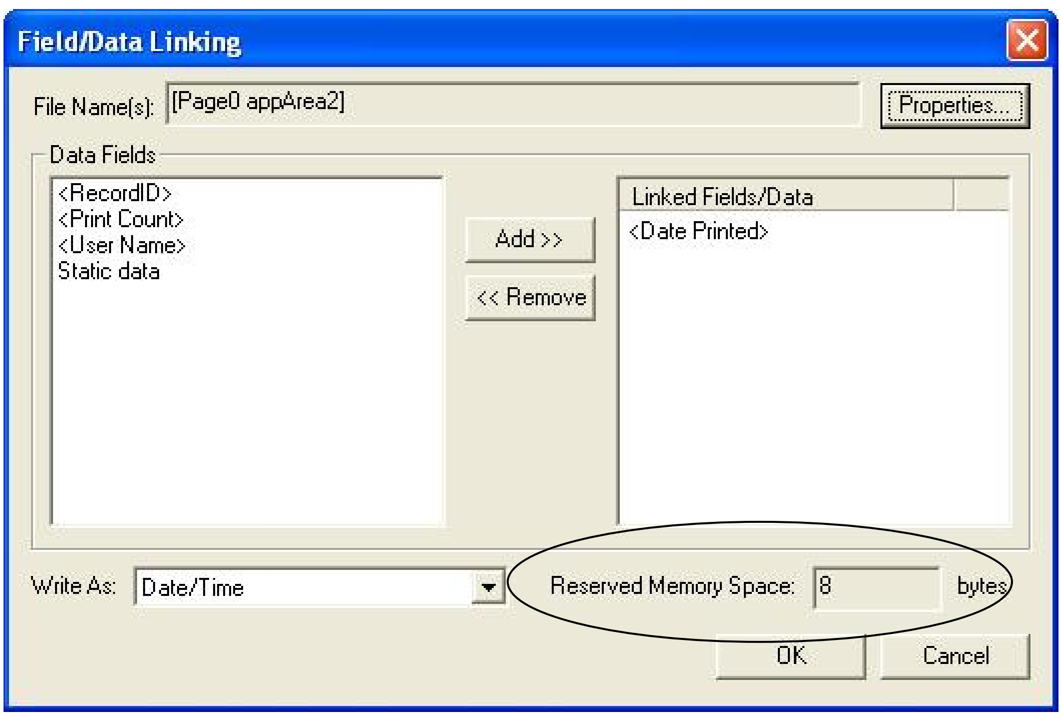
Note2: The above “Write As:” field value is also reflected in the “Data Type” field when you click the Properties button above and click on the All Properties tab.

Note3: The “Reserved Memory Space” value increases as each field is added to the “Linked Fields/Data” column.

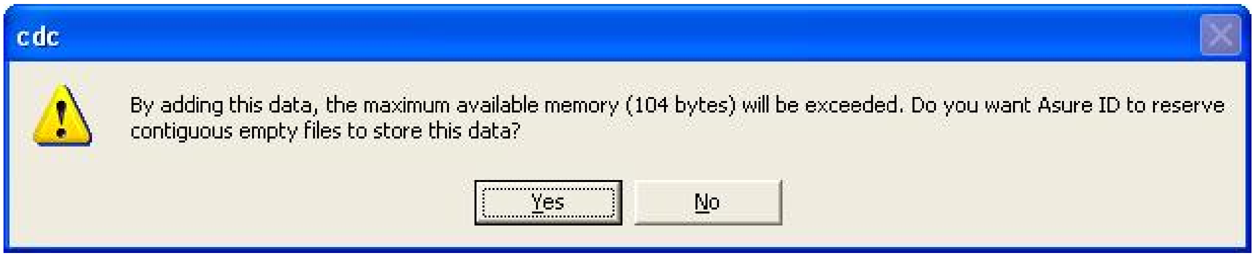


The Reserved Memory Space Field

The “Reserved Memory Space” box indicates how much memory is being reserved for the fields in the “Linked Fields/Data” column. This number grows as each new field is added.

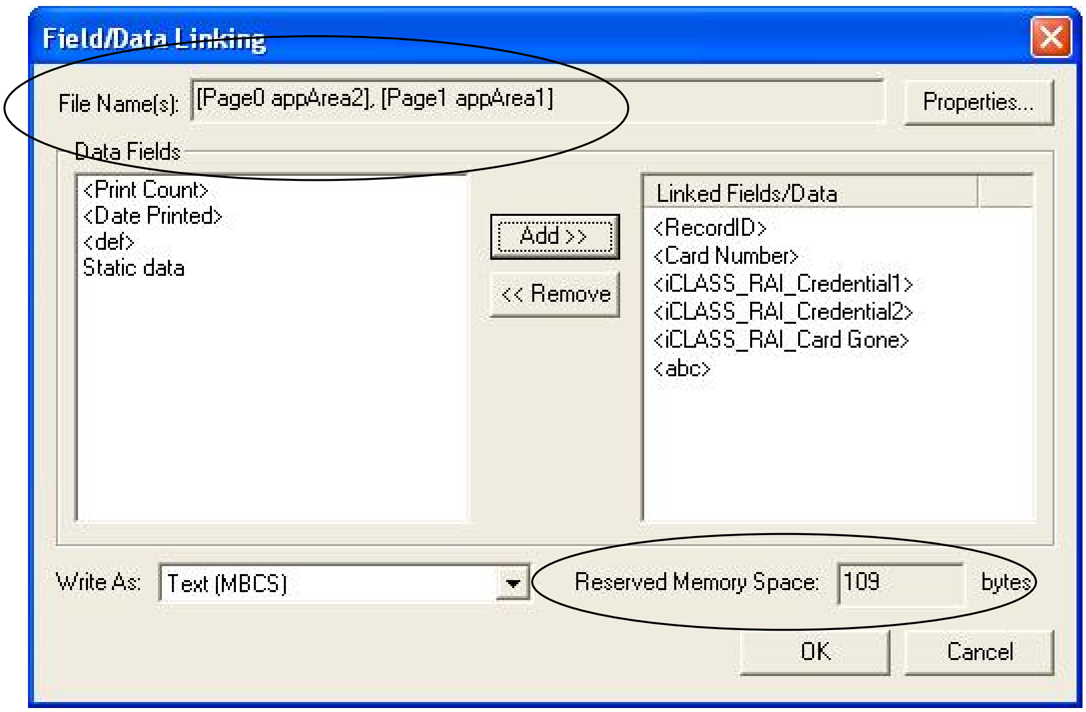


If a field is added that will exceed the maximum size allotted for the file (in this case Page0 appArea2), then the following message displays:



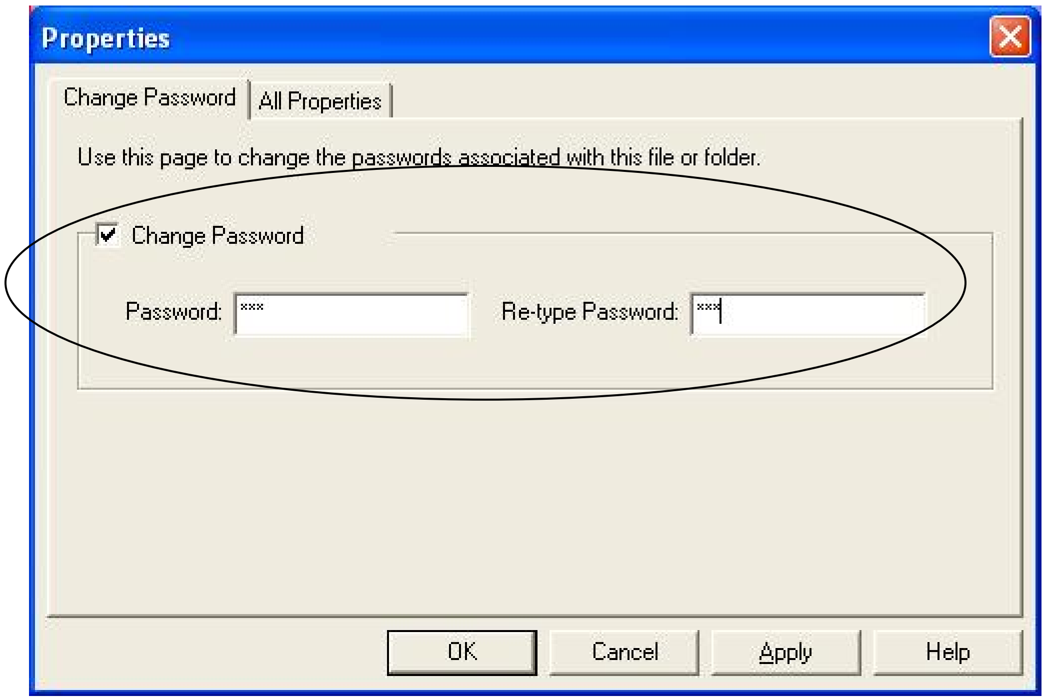
If you click “No”, the addition of the new field is cancelled.

If you click “Yes” then the next contiguous empty file is reserved and the “File Name(s)” field is updated with the name of the reserved file.



The Change Password Tab

This is the tab where you can add or change a password that is associated with a “File Name(s)” field.



Change a Password Procedure

1. Ensure that there is a checkmark in the “Change Password” checkbox.
2. Enter the new password in the “Password” field.
3. Re-type the new password to confirm it.
4. Click the “Apply” button to apply the password and remain in the dialog box or click “OK” to apply the password and exit the dialog box.

Note: Contiguous files will use the same password.

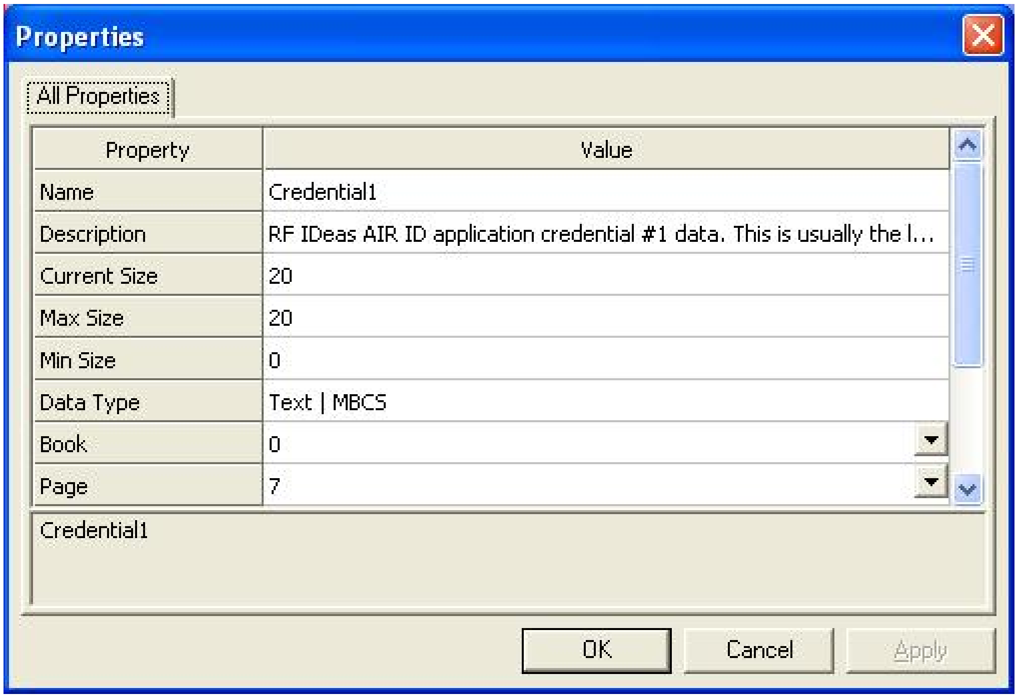
Field Properties Box

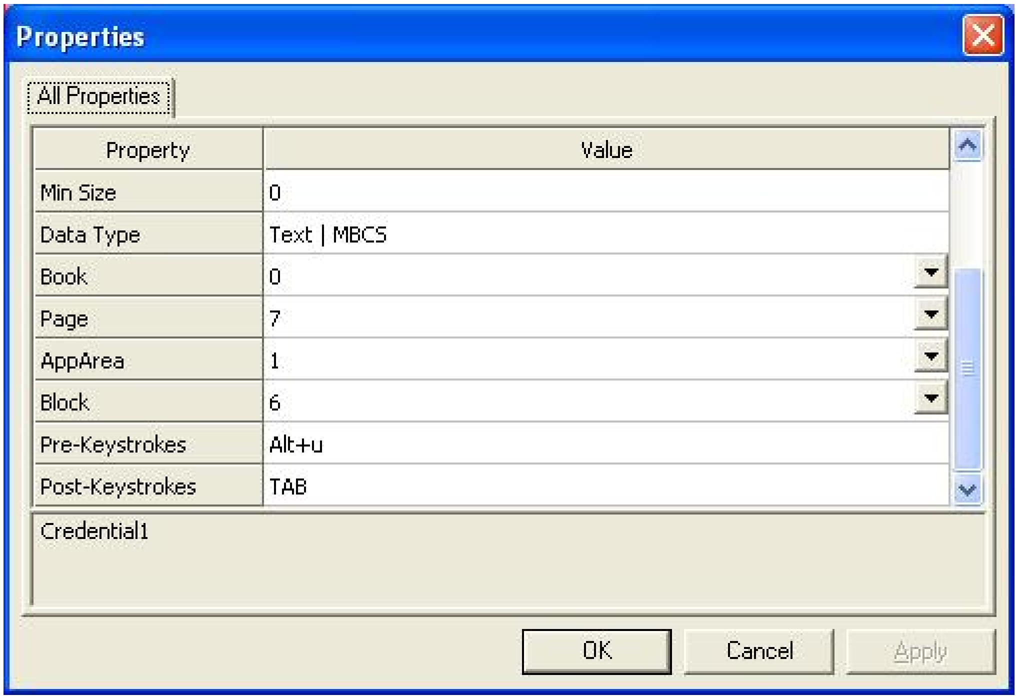
Advanced customization of the iDIRECTOR fields, where available, is done via the Field Properties Box. The “All Properties” tab for QI Purse and Biometrics contain fields with preset values. Logical Access allows for certain fields to be changed. See also the “Memory Maps” topic. It discusses another aspect of the Properties Box.

CAUTION: It is highly recommended that technical staff with smart card knowledge provide the necessary information for any new values to be entered in fields in the properties box.

Logical Access

The next two screens show the Logical Access Properties. **Note:** Some fields from the first screen repeat on the second because of the scroll function.





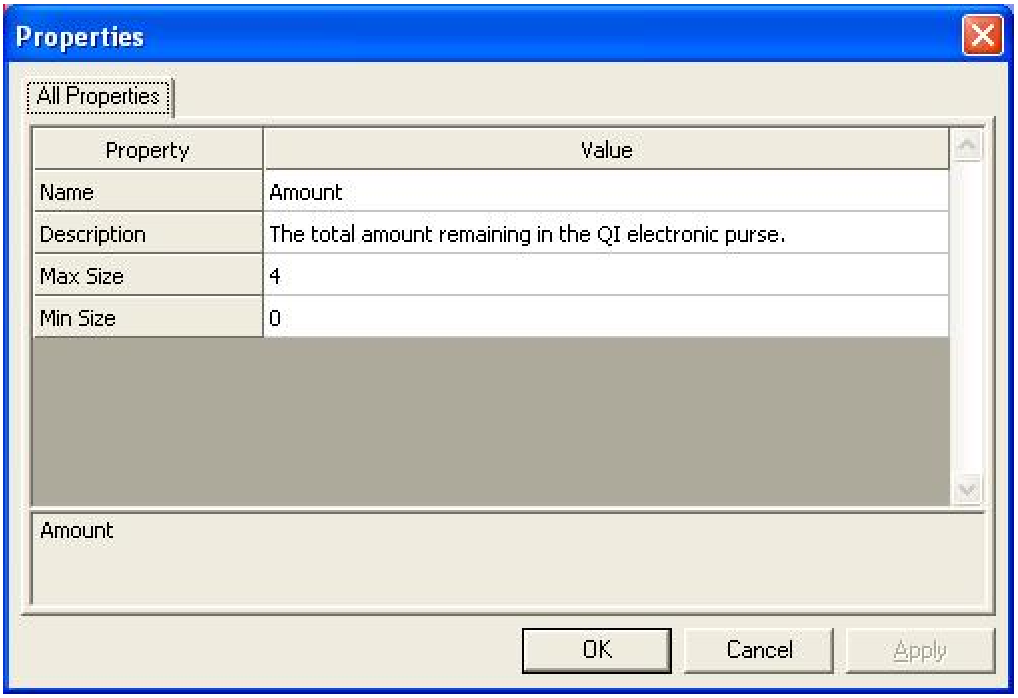
The table following gives a brief description of each field. **Note:** You can also click on some of the fields online to see many of the descriptions below.

Field	Description	Alternate Values? Y/N
Name	The name of the item (e.g., Credential1).	N – System Default value.
Description	The description of the current item.	N – System Default value
Current Size	The current data size, in bytes, of the current object.	N – System Default value
Max Size	The maximum size, in bytes, of the current object. (-1) – Unlimited (Limitation is dependent on the hardware storage capacity). (-2) – Unknown.	N – System Default value
Min Size	The minimum size, in bytes, of the current object.	N – System Default value
Data Type	Sets and returns the format type of the data stored in the file (e.g., Text, Number).	N – System Default value

Field	Description	Alternate Values? Y/N
Book	The “Book” number combining with “Page”, “App Area”, and “Block” denotes the location to which the data information is stored. The “Book” field has a value of 0 or 1 depending on the chip format you selected in the Chip Properties box. For iCLASS 16 k the value is 0 For iCLASS 32 k the value can be either 0 or 1.	Y depending on chip format. Select from values offered in the drop down menu. See **CAUTION** note before making a change.
Page	The “Page” number combining with “Book”, “App Area”, and “Block” denotes the location to which the data information is stored.	Y – Select from values offered in the drop down menu. See **CAUTION** note before making a change.
AppArea	The “AppArea” combining with “Book”, “Page”, and “Block” denotes the location to which the data information is stored.	Y – Select from values offered in the drop down menu. See **CAUTION** note before making a change.
Block	The “Block” number combining with “Book”, “Page”, and “App Area” denotes the location to which the data information is stored.	Y – Select from values offered in the drop down menu. See **CAUTION** note before making a change.
Pre-Keystrokes	The keystrokes that will be sent to the system before the field data is processed. Example: ALT+u will occur before Credential1 is processed.	Y – See description for example.
Post-Keystrokes	The keystrokes that will be sent to the system after the field data is processed. Example: TAB will occur after Credential1 is processed.	Y – See description for example.

QI Purse

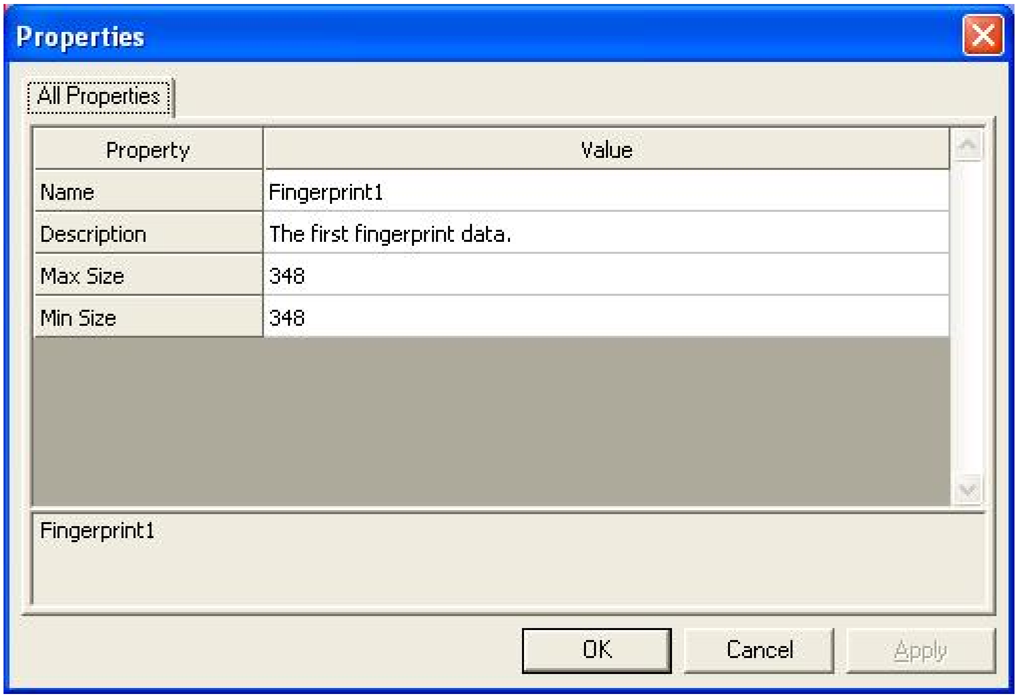
The next screen shows the QI Purse Properties.



Field	Description	Alternate Values? Y/N
Name	The name of the item (e.g., Amount).	N – System Default value
Description	The description of the current item.	N – System Default value
Max Size	The maximum size, in bytes, of the current object. (-1) – Unlimited (Limitation is dependent on the hardware storage capacity). (-2) – Unknown.	N – System Default value
Min Size	The minimum size, in bytes, of the current object.	N – System Default value

Biometrics

The next screen shows the Biometrics Properties.



Field	Description	Alternate Values? Y/N
Name	The name of the item (e.g., Fingerprint1).	N - Default value.
Description	The description of the current item.	N - Default value.
Max Size	The maximum size, in bytes, of the current object. (-1) – Unlimited (Limitation is dependent on the hardware storage capacity). (-2) – Unknown.	N – System Default value
Min Size	The minimum size, in bytes, of the current object.	N – System Default value

Memory Maps

Advanced customization of the iDIRECTOR Memory Maps, where available, is done via the Field Properties Box. The "Memory Maps" for Logical Access and QI Purse are preset and cannot be configured to another location. Biometrics allows for certain memory mappings to be configured. See also the Field Properties Box topic. It discusses another aspect of the Properties Box.

CAUTION: It is highly recommended that technical staff with smart card knowledge provide the necessary configuration support for file memory mapping.

Note: If the required technical knowledge is not available in-house then HID Identity's Professional Services are available to provide the level of expertise required.

Important notes concerning the following iCLASS cards: 16K/2 or the 16K/2 book of the 32K.

a) Page0 appArea1 is generally reserved for HID applications.

b) The 16K2 card and the 16K2 book of the 32K card can currently be used for two of the iDIRECTOR applications (Bioscrypt and/or the Logical Access).

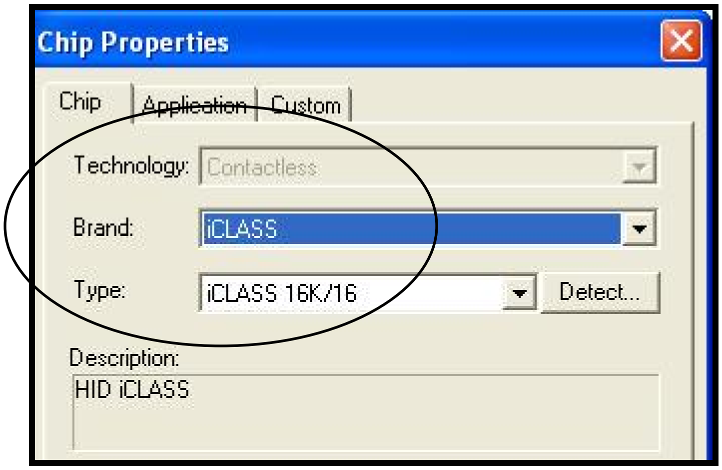
c) If you use passwords for your applications that reside on the appArea2 book of your card, please note that all passwords must be identical.

Implications to the Memory Map When all Three Applications are Loaded to a Card

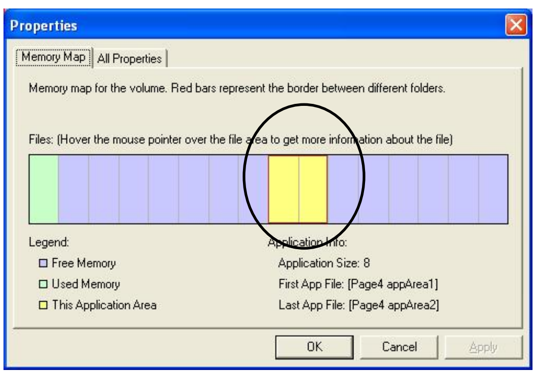
Memory maps tell the user where the applications (e.g., RFIDeas, QI Purse and Bioscrypt) are located on the card chip. Below are examples of the same screen as each of the three applications is added. **Note:** In this example both the required as well as the optional fields were added for each application. The applications were added in the following order:

- QI Purse
- RFIDeas
- Bioscrypt

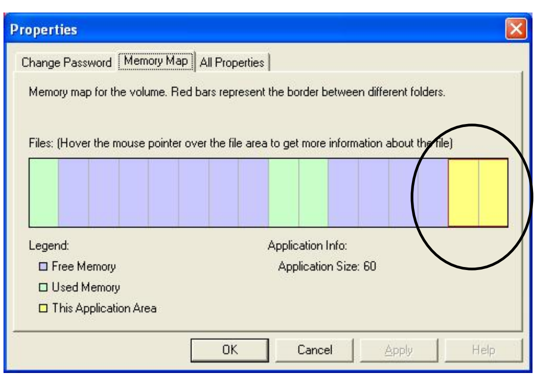
This was done on a card with the following Chip Properties:



Take note of the placement of each application as it is added on the screen below. These are the system default placements for each application. Theses placements occur when the applications are added in the order above (i.e., QI Purse, RFIDeas, Bioscrypt).



QI Purse. There is a red line around the two application blocks. This red line indicates that this application cannot be moved from this location using any feature of the Memory Map. QI Purse also cannot be moved using any other feature of Asure ID.

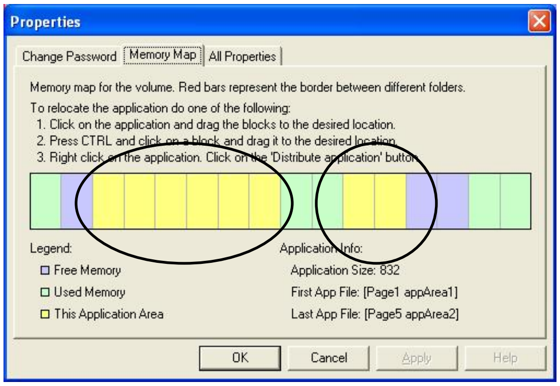


RFIDeas. There is a red line around the two application blocks. This red line indicates that this application cannot be moved from this location using any feature of Memory Map.

Note: The QI Purse application is now shaded in light green.

EXCEPTION: This application will move to another location:

1) if the default location for this application contains another application (e.g., if the location shown in the screen contained the Bioscrypt application then this application would move to the next available opening on the Memory Map.
2) if the specific items for the application (e.g., Credential1) are moved using the Properties Box. Refer to the Properties Box topic for more information.



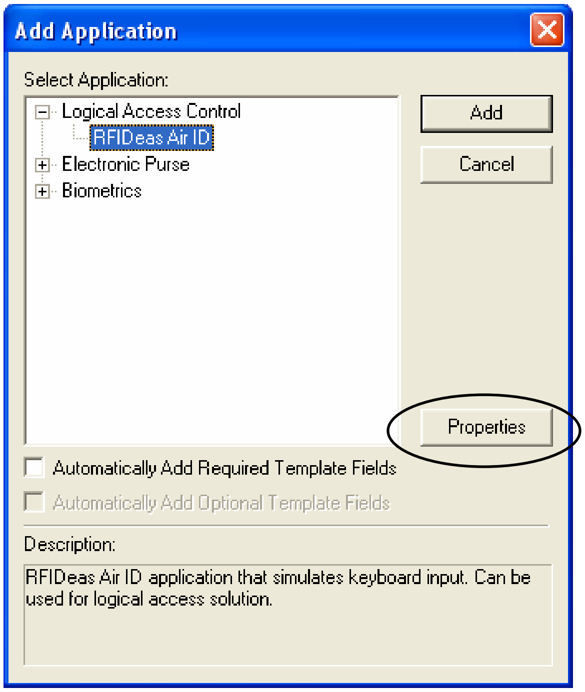
Bioscrypt. There is no red line around the eight applications blocks. This indicates that this application can be moved/distributed from its default location. Moving/distributing can be done using the Memory Map feature or via the Properties Box for the specific item. Refer to the Biometrics Box topic further in this section or the Properties Box topic located before this section.

Call up Memory Map

To call up any of the Memory Maps of any of the iDIRECTOR applications, follow one of the two procedures outlined below:

Before the application has been added to the chip:

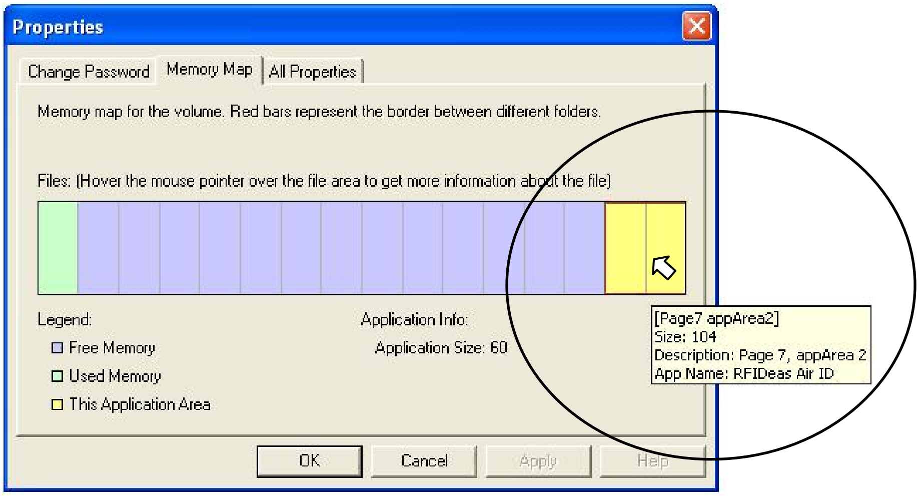
1. From the “Chip Properties” box, click on the “Add Application” tab. The “Add Application” box displays.



2. Click on “Logical Access Control” and select RFIDeas Air ID”.

3. Click on the “Properties” button. **Note:** Until you click on the application (e.g., RFIDeas Air ID, QI Purse or Bioscrypt Fingerprint) the Properties button is “grayed” out.

4. When the screen below displays, click on the Memory Map tab. **Note:** In this example this is the “Memory Map” tab for the “RFIDeas Air ID” application.



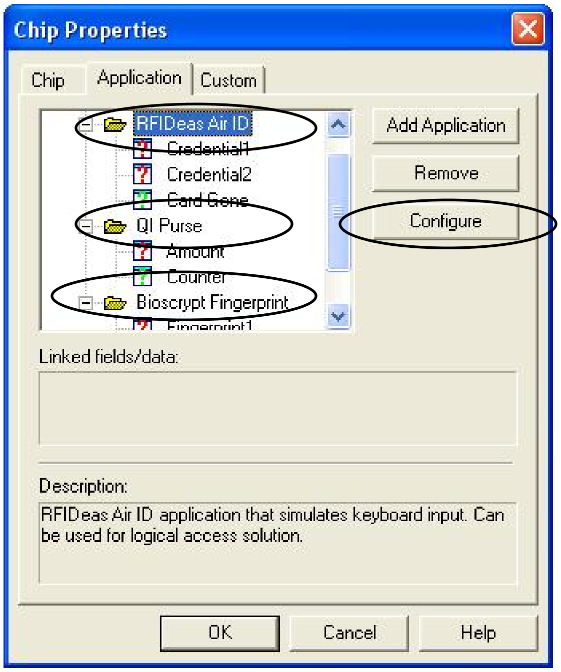
In the screen displayed above the cursor is hovering over the “RFIDeas Air ID” application’s file area. Specific details about the application (i.e., “Size”, “Description” and “App Name”) are displayed in the box just below the cursor. The **red** line around the application area means that the application cannot be moved from this position on the map.

After the application has been added to the chip.

1. Go to the “Card Design Center” screen.

2. Click on the Chip icon. The “Chip Properties” box displays.

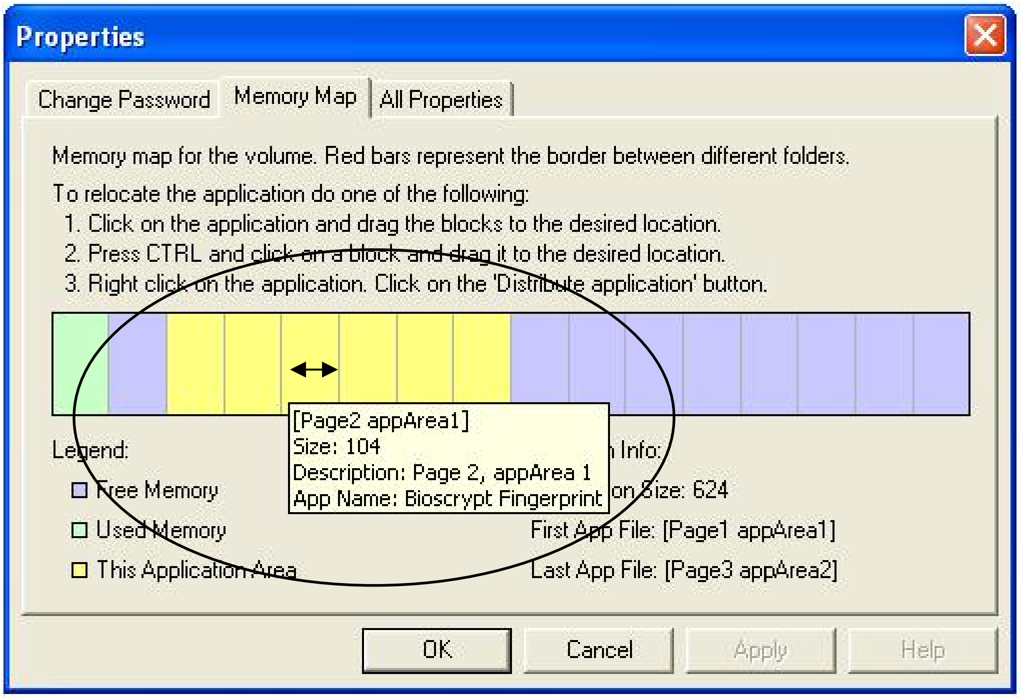
3. Highlight the application you want to look at (i.e., one of RFIDeas Air ID [under Logical Access], QI Purse [under Electronic Purse], Bioscrypt Fingerprint [under Biometrics]).



4. Click on the “Configure” button. The “Properties” box displays.

5. Click on the “Memory Map” tab.

Biometrics



The area circled above illustrates what you see when you hover your cursor over a file area.

Note: The cursor displays as a two ended arrow. This signifies that you can right click to distribute this application. Refer to the relocation steps on the screen above.

Note: Refer to the **caution** note above regarding moving and splitting blocks.

Biometrics allows file memory maps to be moved using the CRTL+DRAG feature. The Legend at the bottom of the screen illustrates how much of the memory is free, how much is used and how much is taken up by the application (e.g., Bioscrypt Fingerprint application). **Note:** When changes are made the "Starts At" and "Ends At" values may change information.

The application can also be split. Splitting allows for the application to be placed in the other areas of the memory.

To perform a split:

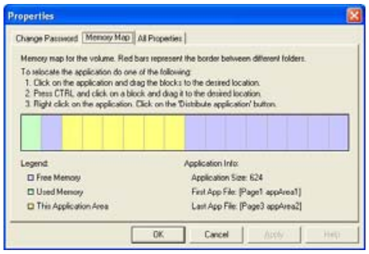
Right click the Bioscrypt application. The following button appears on the screen:

If you click on the “Distribute Application” button, you can then click on free memory locations to distribute your application.

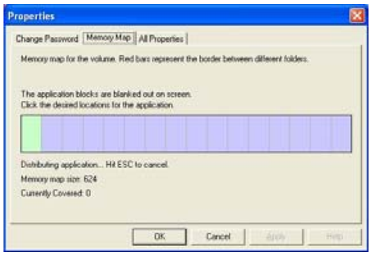
Note: When you click the application will blank out form the screen. Each click you make will insert the file memory maps where you have chosen.

The screen shots below illustrate this point.

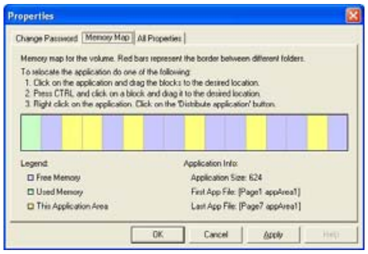
Refer to the **Caution Note** at the beginning of this topic for information configuration support for file memory mapping.



Before you relocate



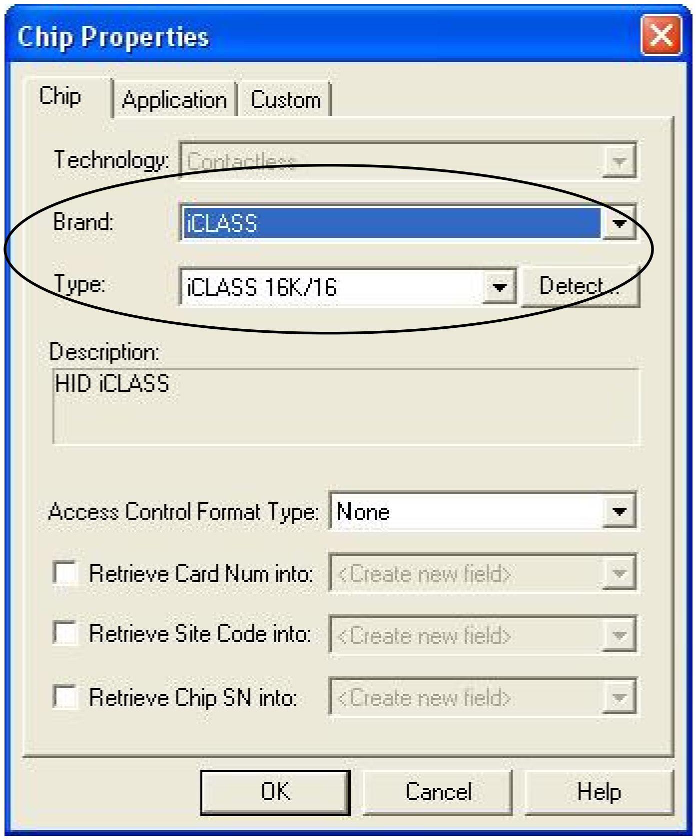
When you first click to relocate



After you relocate

Card Brand and Type

The following table illustrates the options for the card brand and type fields that are located on the Chip Properties template.



For Brand…	You can select…	This allows you to add the following applications…
iCLASS	iCLASS 2K/2	RFID only
	iCLASS 16K/2	RFID and/or Bioscrypt
	iCLASS 16K/16	RFID, and/or Bioscrypt, and/or QI Purse
	iCLASS 32K (16K/2 + 16K/2)	RFID and/or Bioscrypt
	iCLASS 32K (16K/16 + 16K/2)	RFID, and/or Bioscrypt, and/or QI Purse
	iCLASS 32K (16K/2 + 16K/16)	RFID and/or Bioscrypt
	iCLASS 32K (16K/16 + 16K/16)	RFID, and/or Bioscrypt, and/or QI Purse

Important notes concerning the following iCLASS cards: 16K/2 or the 16K/2 book of the 32K.

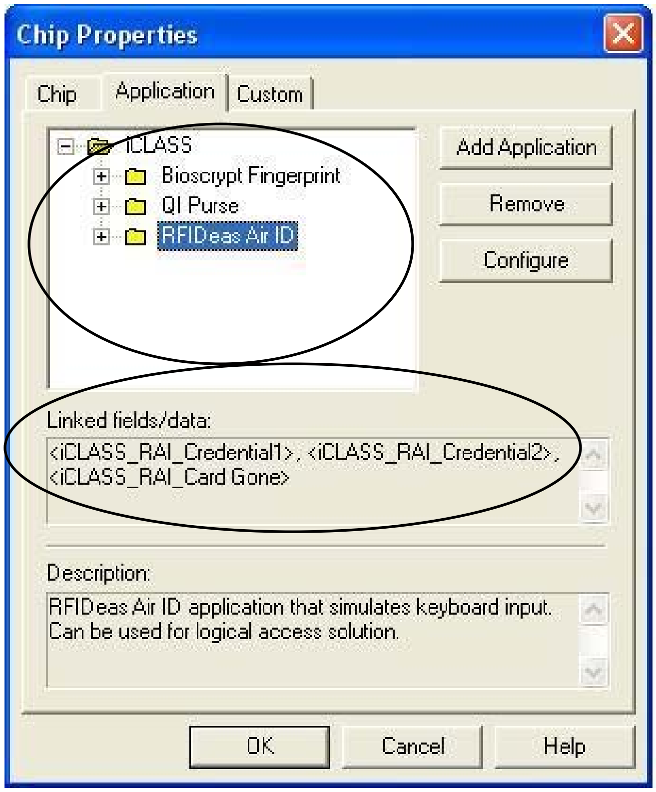
a) Page0 appArea1 is generally reserved for HID applications.

b) The 16K2 card and the 16K2 book of the 32K card can currently be used for two of the iDIRECTOR applications (Bioscrypt and/or the Logical Access).

c) If you use passwords for your applications that reside on the appArea2 book of your card, please note that all passwords must be identical.

Remove application from Chip Properties Box

1. Go to the “Card Design Center” screen.
2. Open the design for which you want to remove the template fields.
3. Click on the chip icon. The “Chip Properties” box displays.



4. Click on the “Application Tab”.
5. Click on the iCLASS folder.
6. Highlight the application you want to remove (in the above diagram it is the RFIDeasAir ID subfolder that is highlighted for removal).

Note: The Linked fields/data field lists the names of the fields included in the application (in this case the RFIDeasAir ID application. You can make note of the field names at this point for reference in the second part of this removal process.)

7. Click on the Remove button.

8. Respond yes when the “Asure ID” dialog box appears.

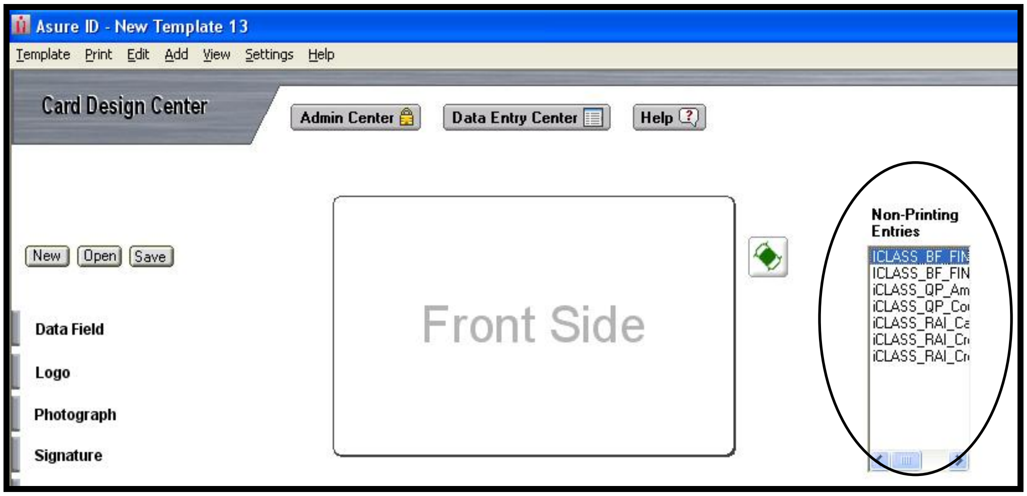
9. Click “OK”.

The application is now removed from the “Chip Properties” box.

Remove Fields from Non-Printing Entries Box

To delete the fields from the “Non-Printing Entries” box, follow the steps below.

1. Go to the Non-Printing Entries box on the “Card Design Center” screen. **Note:** The “Non-Printing Entries” box is to the right of the screen.

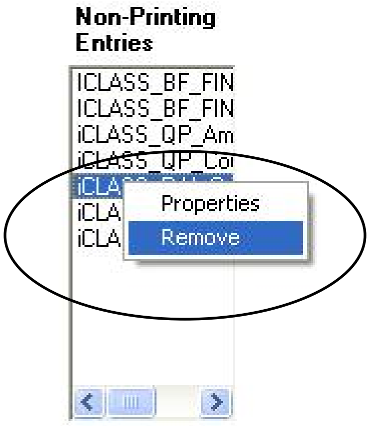


2. Highlight each of the field names to be removed.

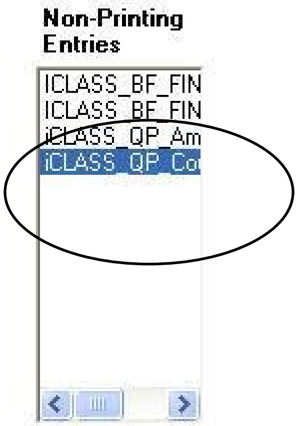
3. Right click on the field name.

4. Click on Remove.

Note: Repeat steps 2-4 for the number of fields to be removed.



with entries



after removal of entries

Importing from ID Card Maker

Introduction

ID Card Maker technology platform, allows Asure ID users to import data and templates from ID Card Maker releases 4 - 4.02. These imported data and templates can then be used in the creation of Asure ID cards.

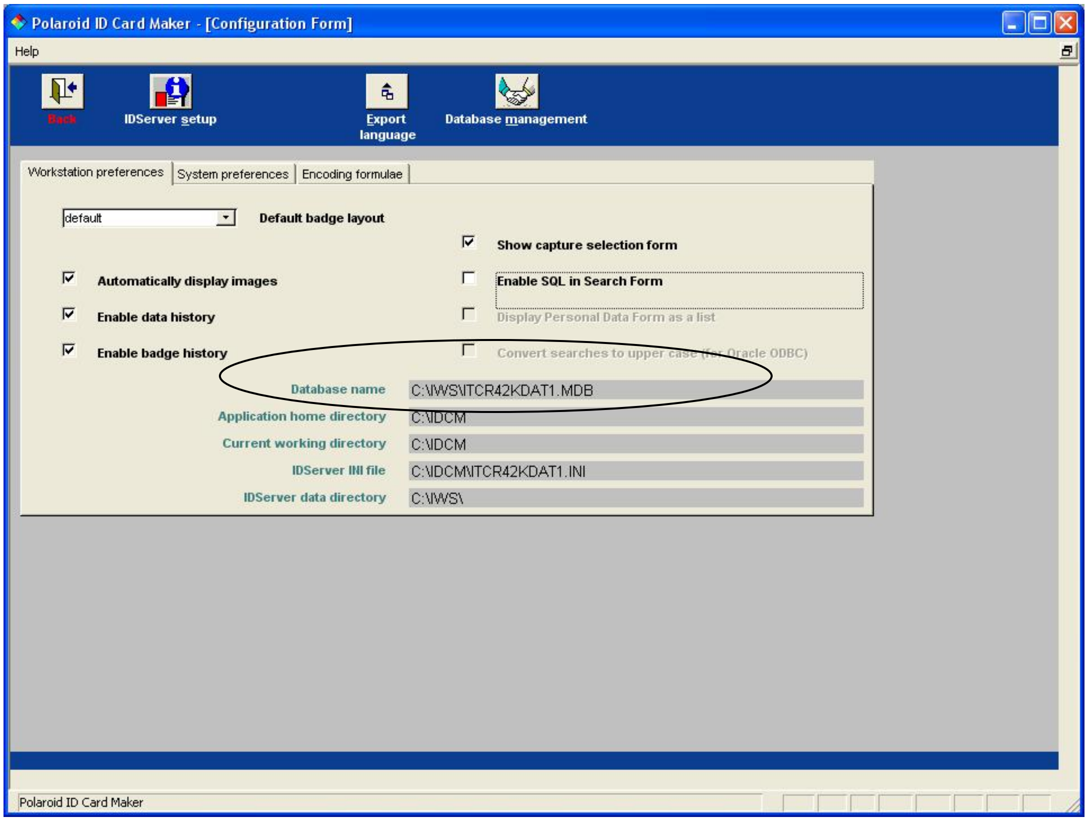
Note: There must be at least one saved template (created the Card Design Center) in order to open the Data Entry Center screen.

Document Section	Use when…
Locating the path for the ID Card Maker Database	…you wish to find the path for the database
Preparing the Database	…you wish to prepare for the import of the database from ID Card Maker to Asure ID.
Importing Card Data into Asure ID	…you wish to perform the actual import of the database from ID Card Maker to Asure ID.
Working with Imported Data	…you wish to work with the imported data. This section contains details that are specific to the imported data.

Locating the path for the ID Card Maker Database

This section contains the steps to take to locate the path for the ID Card Maker Database.

1. Start the ID Card Maker application.
2. Click on the tools button.
3. Click on the Configuration button. The following screen displays:



Note: The “Database Name” field displays the full database path.

4. Open “Windows Explorer”.

5. Using the path name from the previous screen, locate the ITCD42Kdat.mdb file.
   Caution: There may be several files with similar names in the same location. Ensure you choose the “dat” file. DO NOT choose the “app” or “sys” file.

6. Double click the file to open it. The Microsoft Access screen opens.

7. Go to the next section “Preparing the Database”.

Preparing the Database

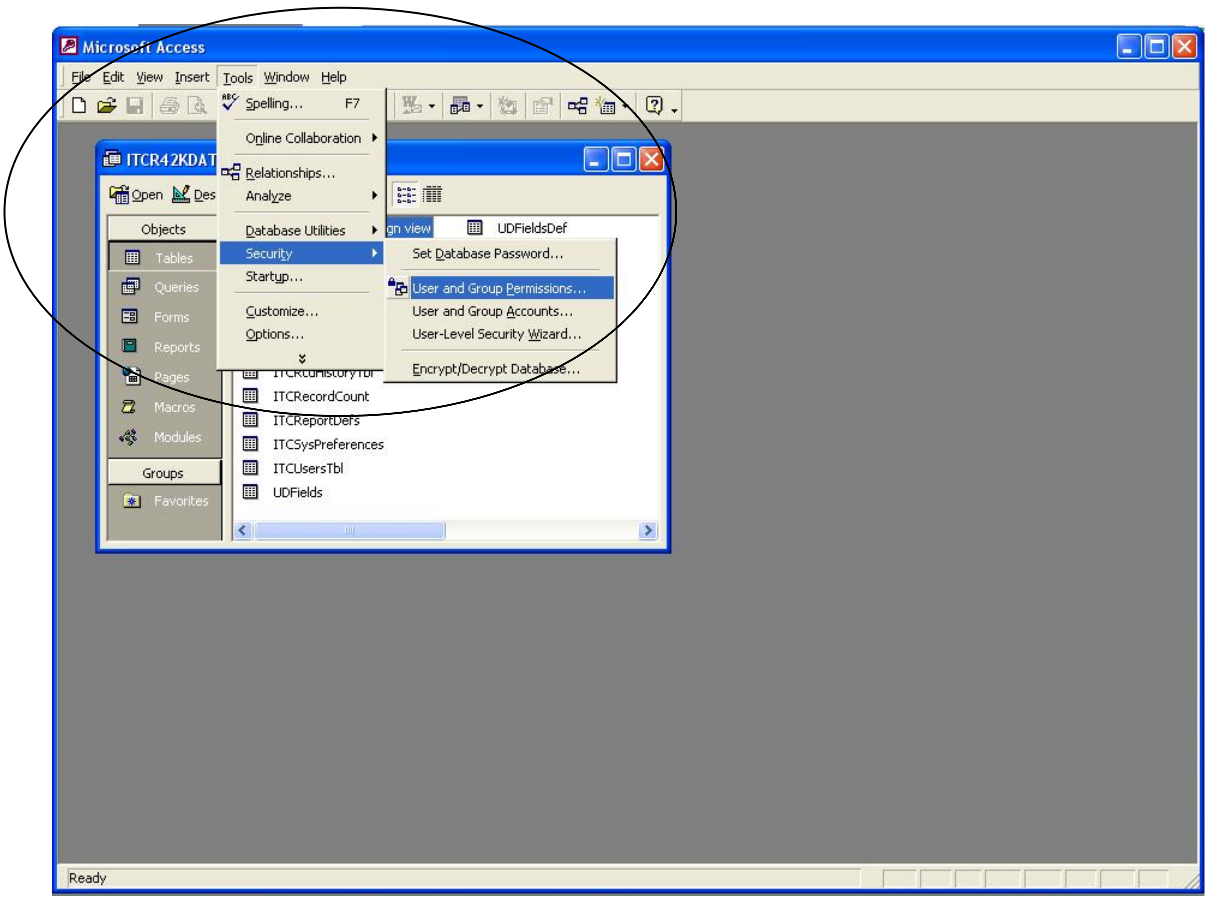
From the previous section “Locating the Database” you opened the database file ITCR42Kdat.mdb. The following steps will help you prepare the database for importing into Asure ID.

These steps begin at the Microsoft Access screen.

1. In Microsoft Access, select “Tools” on the menu bar.

2. Select “Security” from the Tools dropdown list.

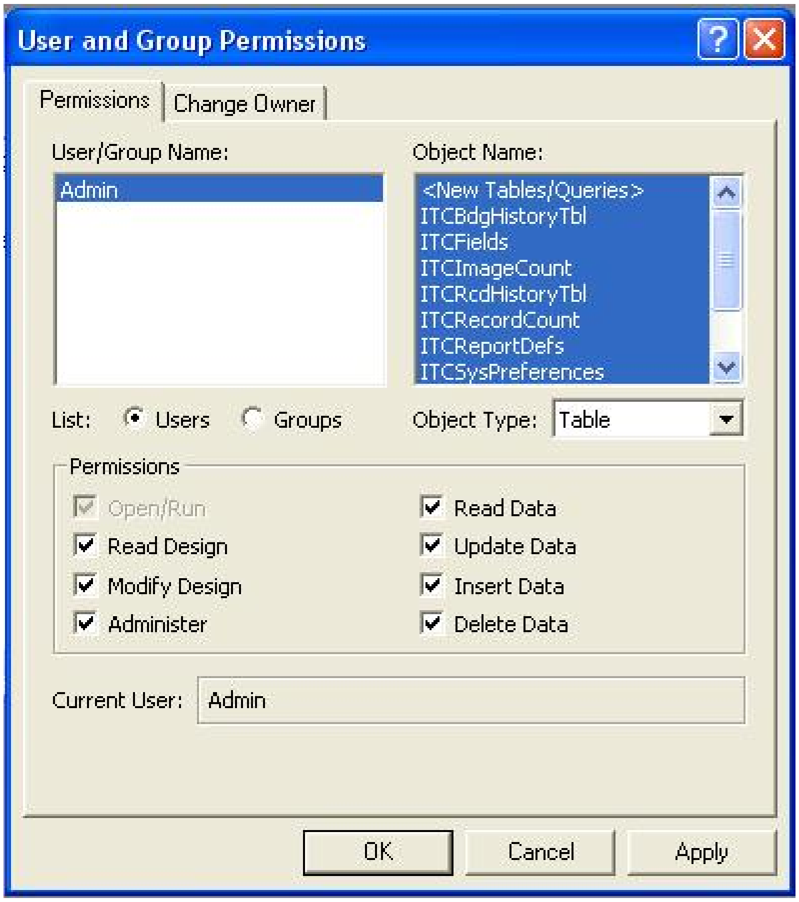
3. Select “User and Group Permissions”. Your screen should appear similar to the one shown below:



4. Click your selection. The “User and Group Permissions” box displays.

5. Using the shift or control key select all the items under “Object Name”

6. Ensure that all the check boxes are ticked under “Permissions”. Your screen should look similar to the following:



7. Click OK.

8. Exit Microsoft Access.

Importing Card Data into Asure ID

This section contains the steps to take to import Card Data into Asure ID.

1. Open the Asure ID "Data Entry Center".

2. Click on the "Database" menu item.

3. Select "Import from ID Card Maker". Your screen should look similar to the one shown here.

4. The import proceeds automatically. A progress bar displays.

5. When the “OK” button is enabled, click on it to complete the import.

The result of the import - the “IDCardMakerMasterTable” template is added to Asure ID:

The “IDCardMakerMasterTable” is the host template to which the other imported ID Card Maker templates (e.g., default, corp, dossier and flower) are bound. This master table contains all the data fields that were in the original ID Card Maker database. The “IDCardMakerMasterTable” does not have a card layout defined. No cards with vital information can be printed from the “IDCardMakerMasterTable”.

Note: Because the ID Card Maker templates are bound, then any data changed in a field used by any/or all of these bound templates will be changed for the same field of the other template(s). Example: If both the “corp” and “flower” templates share the “Badge ID” data field then a change to the data in the “corp” template’s “Badge ID” field will change the data in the “flower” template’s “Badge ID” field as well.

The appearance of these templates is very similar to the original badge layouts. However due to differences in how certain features are implemented between the applications, these templates may not be identical. It is recommended that the newly created templates be opened in Asure ID Card Center Design to check the layout and make any adjustments as may be necessary.

Working with Imported Data

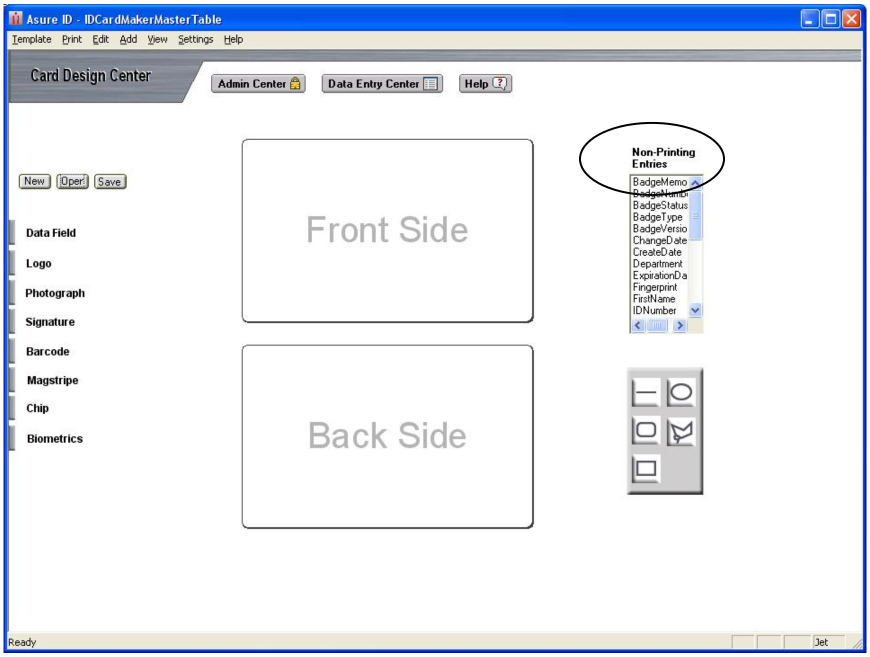
This section contains details that are specific to working with the imported data.

The templates and data imported from the ID Card Maker can be worked on as you would with any other Asure ID templates for data. However, there are some specific details for working with the imported data.

Steps to add an existing IDCardMakerMasterTable field to a bound template

1. Open the “Card Design Center”.

2. Open the “IDCardMakerMasterTable” template.



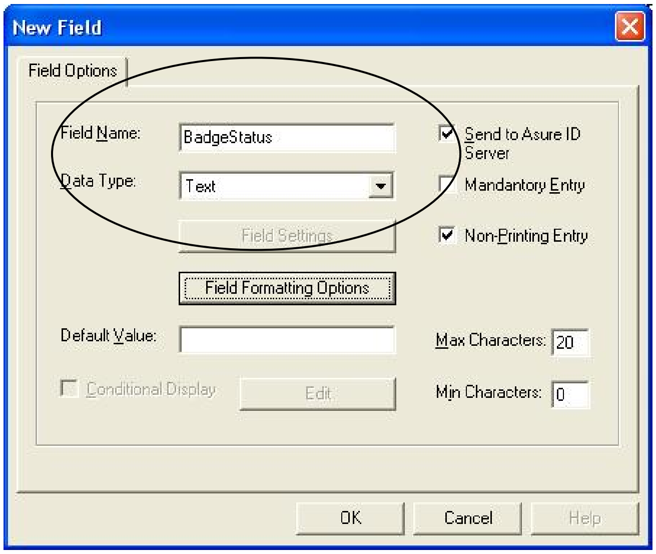
3. In the “Non-Printing Entries” box, double click on the field you want to add to a bound template. Take note of the spelling of this field name. Ensure that you obtain the exact spelling.

4. Still in the “Card Design Center”, open the template to be modified.

5. Click on “Data Field” to add a data field to your card.

6. In the “New Field” dialog box that appears, change the name of the field so that it matches the field name in the “IDCardMakerMasterTable”. (See sample screen below.)

7. From the drop down menu, select the “Data Type” that corresponds to the existing data (e.g., text, number).



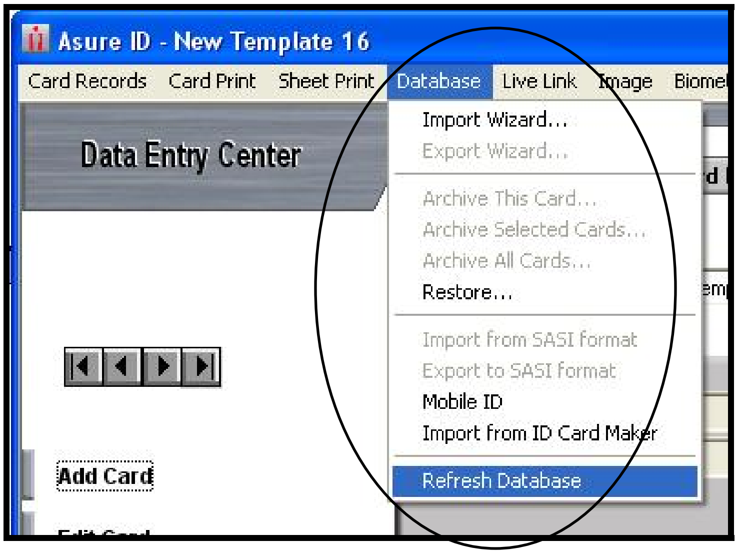
8. Click “OK”.

Asure ID automatically finds the existing data to use for the field added to the bound template.

9. Save the template.

10. Open the “Data Entry Center” (DEC).

11. Select “Database” on the menu bar and click on “Refresh Database”.



The data image field has been added to your template and both the field and the template have been bound to the "IDCardMakerMasterTable".

Steps to use existing ID CardMaker Photographs, Signatures and Fingerprints in an Asure ID template

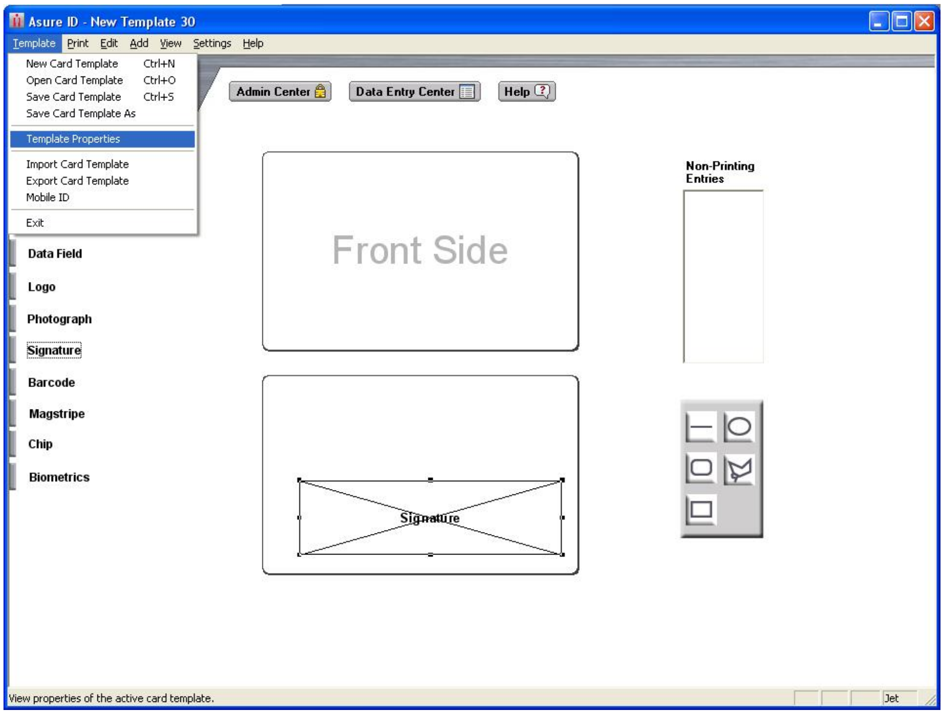
1. Open the "Card Design Center".
2. Open the "IDCardMakerMasterTable" template.
3. Take note of the spelling of the field name you wish to add to your new or existing unbound template (e.g., Signature field).
4. Open the template where the specific data field (i.e., Photograph, Signature, Fingerprint) is to be added.
5. Add the image data field for the Photograph, Signature or Fingerprint to the unbound template.

   Note1: Ensure that you obtained the exact spelling. Misspelled field names are not bound to their counterparts.

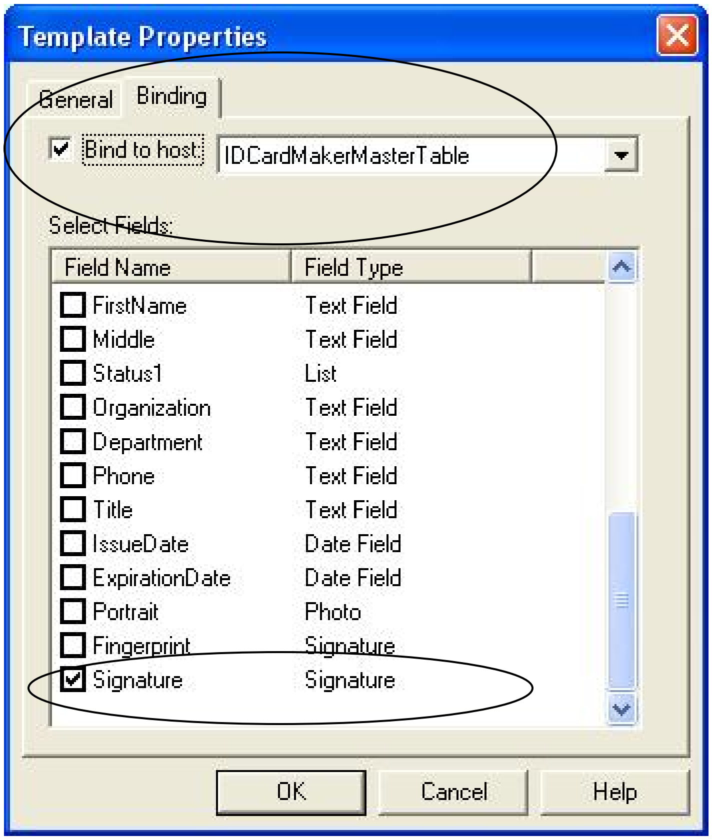
Note2: Fingerprints imported from ID Card maker become signature fields in Asure ID. To add a fingerprint image to an Asure ID layout, add a signature field with the name "Fingerprint".

6. Click "Template" on the menu bar.

7. Click the "Template Properties" selection.



8. The dialog box displays. Click on the "Binding" tab.



9. Select the “IDCardMakerMasterTable” template.

10. Check the “Bind to host” selection.

11. Verify that the desired data image field has been checked. **Example:** In the screen shot above it is the “Signature” box that is checked.

12. Click “OK”.

13. Save the template.

14. Open the “Data Entry Center” (DEC).

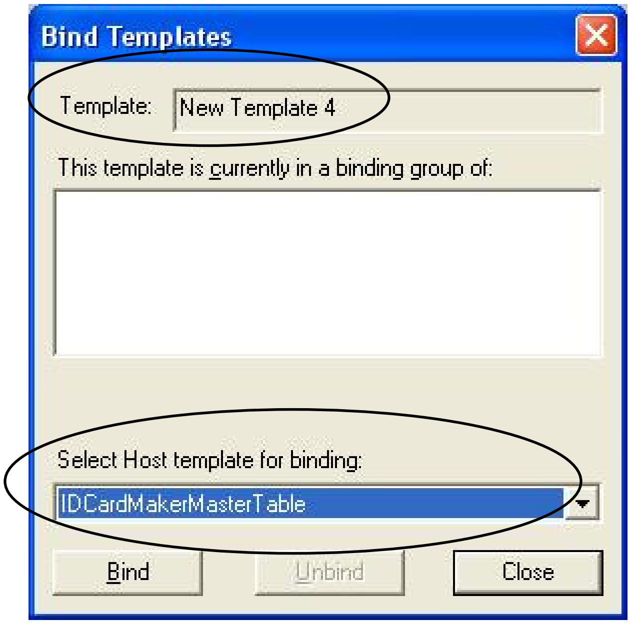
15. Click on the “Database” selection on the menu bar.

16. Click on the selection “Refresh Database”.

The data image field has been added to your template and both the field and the template have been bound to the “IDCardMakerMasterTable”.

Steps to add other “IDCardMakerMasterTable” fields to a template

1. Open “Card Design Center”.
2. Open the “IDCardMakerMasterTable” template.
3. Take note of the spelling of the field name you wish to add to your unbound new or existing template.
4. Create your new template or open your existing unbound template in the “Card Design Center”.
5. Add at least one data field that matches a field from the “IDCardMakerMasterTable”.
6. Save your template.
7. Open the “Data Entry Center”.
8. Select your unbound template.
9. Select “Templates” from the menu bar.
10. Select “Bind” Templates



11. In the section "Select Host template for binding" select "IDCardMakerMasterTable" from the drop down list.

12. Click the "Bind" button.

13. Click the "Close" button to return to the DEC.

14. Select "Database" on the menu bar and click on "Refresh Database".

Your newly bound template can now be used in the same manner as the templates imported from "ID Card Maker".

Importing and Exporting SASI Formats

The Import and Export SASI Format selections are designed to allow you to import and export SASI and Lifetouch school data formats into/from Asure ID.

Before you begin:

1. Ensure that you have purchased and installed the license(s) for the plug-in(s).

2. Design your card template that you will import your SASI and Lifetouch formats to.

   Note1: The Import and Export SASI Format selections are only available for selection from the DEC after cards have been created using your template.
   Note2: The template you create in step 2 above must have at least one text field, one number field and one photo field.

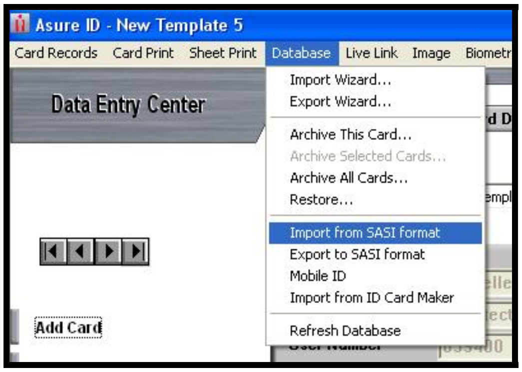
Import SASI Format

Use this procedure when you want to import the SASI format from

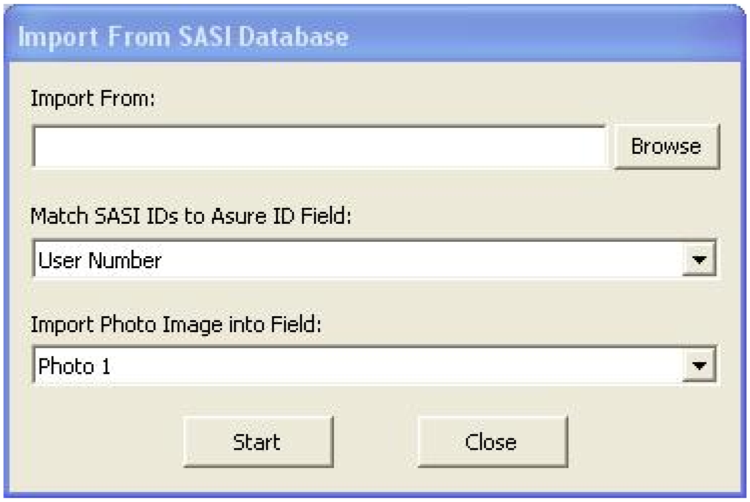
17. Open the "Data Entry Center" (DEC).

18. Open the template you designed in the "Card Design Center" (CDC).

19. Select Database from the menu bar and click on "Import from SASI format".



The following dialog box displays:



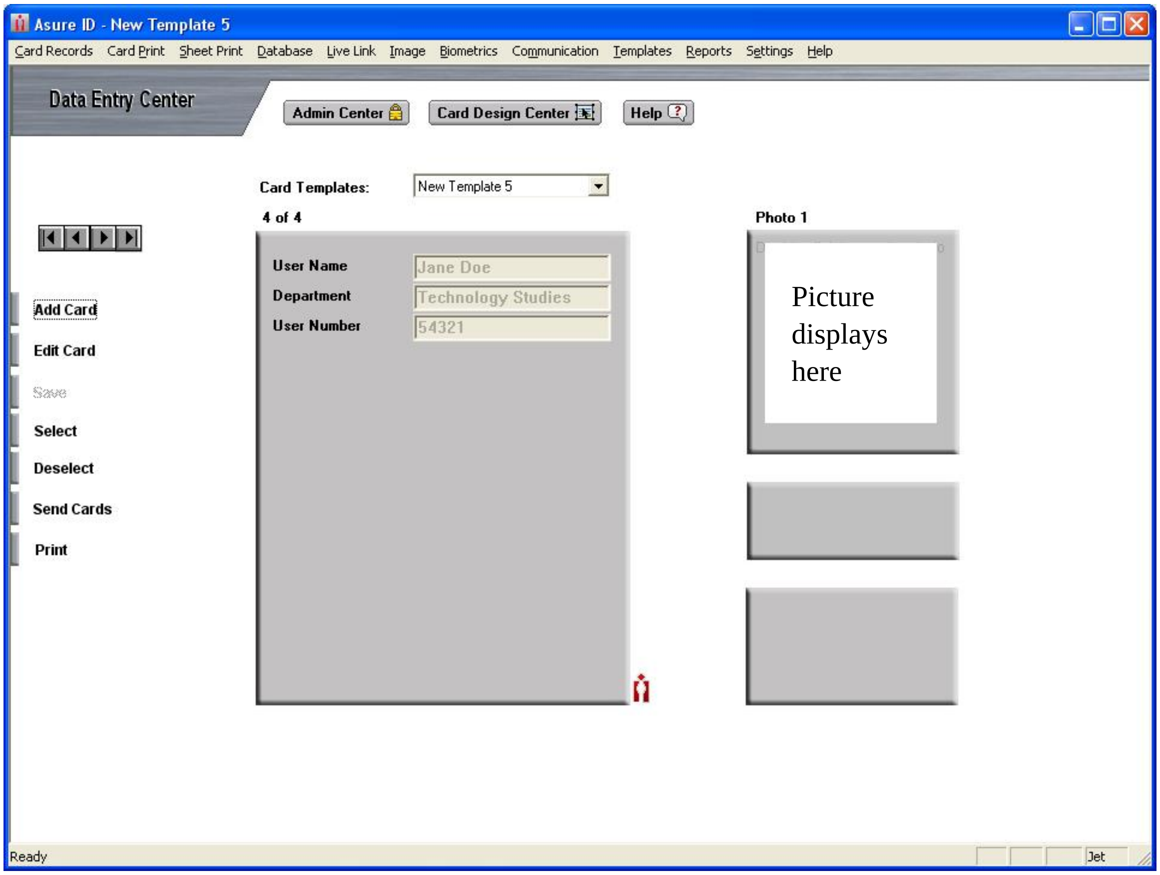
20. Complete the following fields:

Field Name	**Field Value / Description**
Import From	Type in the location of the SASI database the import will be done from. OR Use the browse button to locate the SASI database.
Match SASI Ids to Asure ID field.	Use the drop down menu to choose your Asure ID field to be used in the match. The value of your Asure ID field will be used to locate a matching record in the Asure ID database. If a match is found the corresponding picture will be inserted into the next field you have to select (i.e., “Import Photo Image into Field”). **Note:** The default value for this field is “Created by”.
Import Photo Image into Field	Use the drop down menu to choose the field into which the photo image is to be imported.

21. Click the “Start” button to begin the import.

22. Click “OK” when the dialog box similar to the one below displays. This dialog box signifies that the import is complete.

The record looks similar to the one below. The SASI format picture has been imported.



Export SASI Format

Use this procedure when you want to export Asure ID photos into the SASI format.

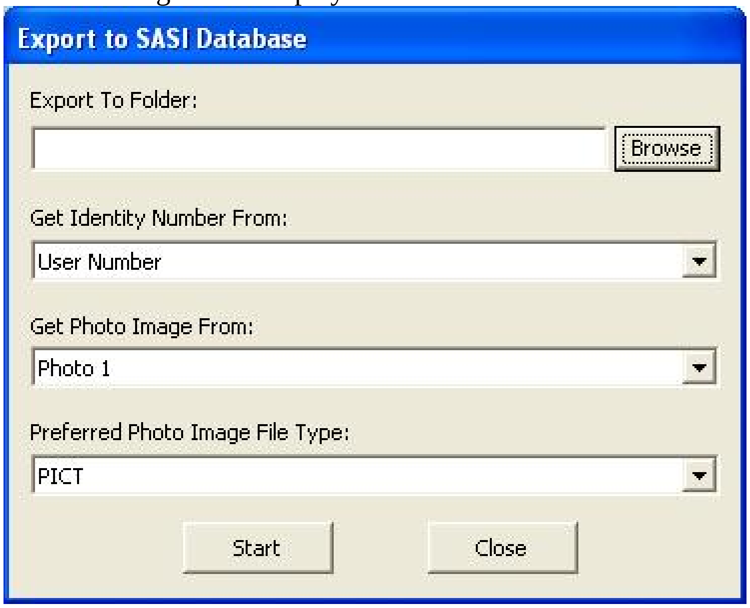
Before you begin, create the folder into which your exported data will go, OR check the name and the path for this folder if it has already been created.

15. Open “Data Entry Center”.

16. Call up the template from which you want to perform the export.

17. Select “Database” from the menu bar and click on “Export Import to SASI format”.

    The following screen displays:



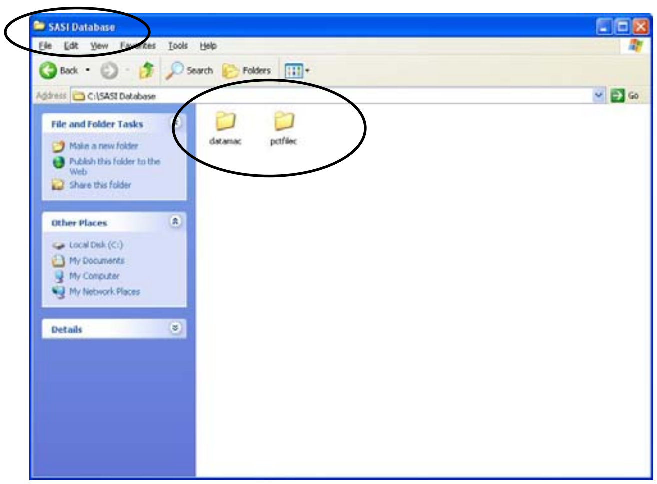
18. Complete the following fields:

Field Name	Field Value / Description
Export to Folder	Type in the name of the folder where the exported photos are to be placed. OR Click on the Browse button to select the folder. **Note:** You may have to create this folder before you begin this procedure.
Get Identity Number From	Use the drop down menu to choose the Asure ID field from which the identity number will be taken. The value in this field will be exported to a .txt file in the datamac folder of the newly created SASI Database. The values in this file will then have a one to one correspondence with each photo loaded in the pctfilec folder. **Note:** The default value for this field is “Created by”.
Get photo image from	Use the drop down menu to choose the Asure ID photo field from which the photos will be taken. The value in this field will be exported to a .pic (or jpg) file in the pctfilec folder in the newly created SASI Database. The values in this file will then have a one to one correspondence with each identity number in the file in the datamac folder.
Preferred Photo Image File Type	Use the drop down menu to choose the file type for the photos that will be exported. The values may be file type PICT (i.e., .pic) or JEPG (i.e., .jpg).

5. Click the “Start” button to begin the export.

6. Click “OK” when the dialog box similar to the one below displays. This dialog box signifies that the import is complete.

Note: The files in the newly created SASI database may look similar to those shown below. The SASI format pictures have been exported.



Mobile ID

Introduction

Mobile ID provides Asure ID users a method of verifying a cardholder using a Handheld PC device. This methods is:

- **Read Data on Card** – This method allows the information on the chip contained to be read using a Handheld PC device. The information contained within the chip is then displayed on Handheld PC device.

IMPORTANT: To use Mobile ID you require an SMI license key. To obtain the key visit SMI's website at

www.smi-global.co.uk

SMI also provides a manual of steps for operating the handheld reader device. It is recommended that these steps be reviewed in conjunction with this Asure ID manual.

Asure ID and SMI Mobile Integration – Process Flow

Customer has requirement for Mobile ID solution

Customer contacts Dealer who determines:

1. Card Technology
2. Software Type required
3. Reader Type required
4. Handheld Device required

Dealer goes to Website: www.smi-global.co.uk

1. If Dealer already has username & password, they log-on to secure site. If not, they use link to apply for credentials.
2. Dealer downloads appropriate software type (refer to Product Selector flow chart on next page).
3. Dealer orders Readers and if required, Handheld Devices.

Dealer:

1. Installs software on each Handheld Device.
2. Runs software on each Handheld Device. This action generates a "seedkey" which is required for Handheld Device activation.

Dealer goes to website: www.smi-global.co.uk

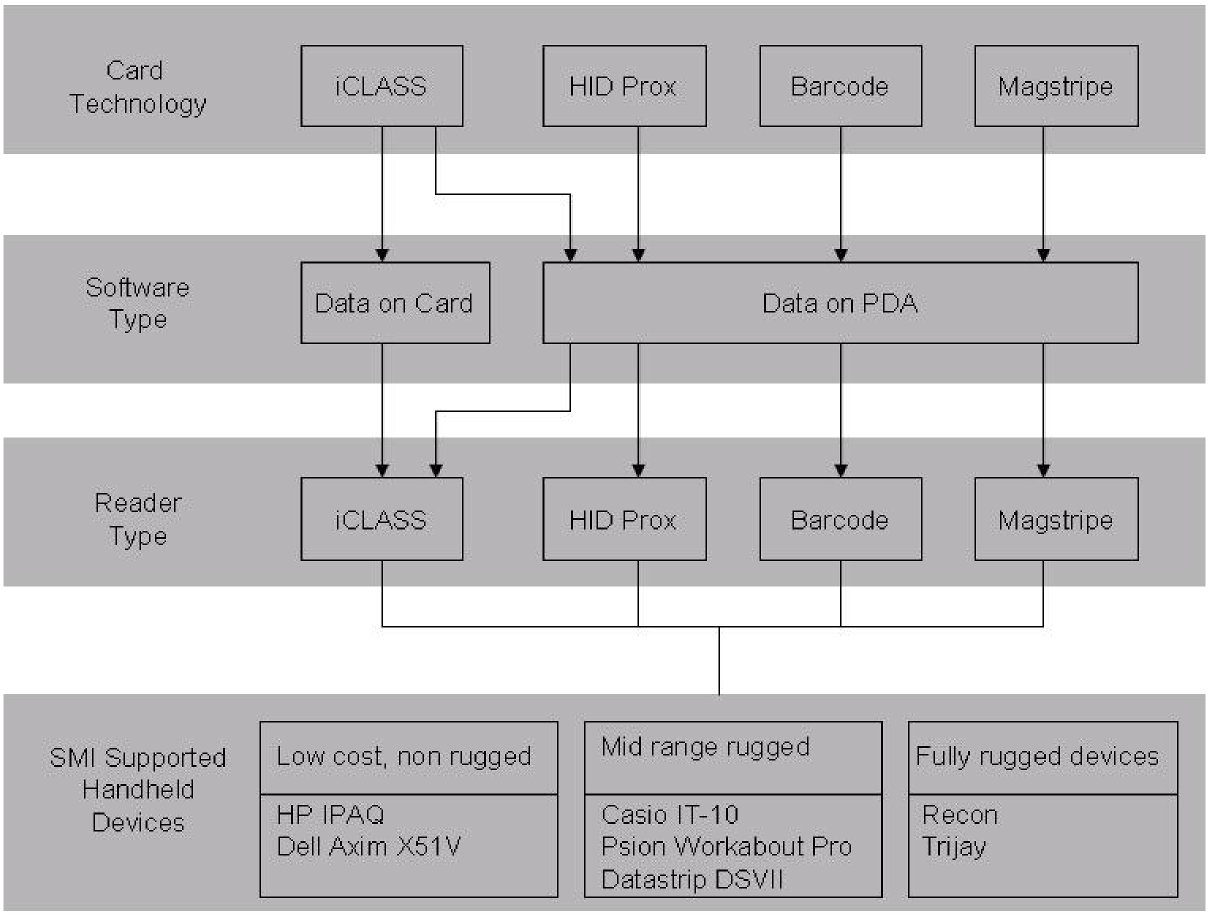
1. Dealer enters "seedkey" for each Handheld Device. This action generates a unique license file.
2. Dealer loads license file onto each Handheld Device to activate the software.

Dealer delivers configured Hand-helds to Customer

Customer uses Asure ID to:

1. Select required fields from database, and design the Mobile ID template. The customer then selects "Data-on-Card" which prints the card surface and encodes each iCLASS chip with cardholder data.

- - Product Selector - -



Create a Card

To create a card for use with the Mobile ID feature, use the “Quick Start Guide – A Step by Step Tutorial” and follow the general steps to create cards (i.e., Designing a Card Template, Creating Card Holder Record, and Printing a Card).

The following points apply specifically to data fields that you may want to add to Mobile ID. You can use these points to configure the layout of your card with respect to creating a Mobile ID template.

1. The Mobile ID template loads all fields that exist on the created card.

   Note: A field can be non-printing on a card but be seen on the Mobile ID template.
2. The data field types not supported by Mobile ID include:
   a. Label Rich Text
   b. Special Characters
   c. Logo
   d. Clone fields
   e. Bold
   f. Italics

Note: For “iCLASS” and “Prox”, the unique id can be either the HID 26 bit or the HID Corporate 1000 format. Please refer the manufacturer’s coupler/reader specifications to ensure compatibility between the format chosen and the coupler/ reader being used.

“iCLASS” couplers/readers supplied by SMI will read both the 26bit and Corporate 1000 formats.

Other manufactures will read the 26 bit format and may or may not read the Corporate 1000 format. Please refer to the specifications from other manufacturers concerning the HID access control formats they support.

Mobile ID Setup Steps

The steps below are the steps that apply to the Mobile ID Data on Card method.

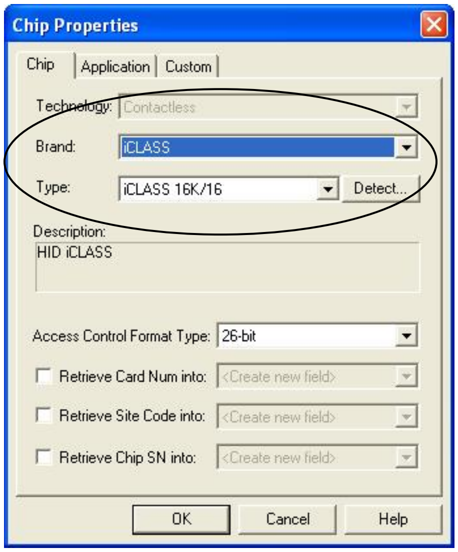
- Configure the unique identifier on the card template in the Card Design Center (CDC).
  Note: The Mobile ID data automatically utilizes any remaining free space on a chip. Please also note that any space occupied by other applications or data may affect the quality of the Mobile ID data displayed.
- Create the Mobile ID Template in the CDC
- Set the Mobile ID Device Properties
- Synchronize the MTP file
- Add the record information (DEC) (i.e., perform the Data Entry Center steps) and Encode the Smart Card (DEC)

Configure the unique identifier in the Card Design Center (CDC)

After designing your card template, please follow these steps to configure the unique identifier on your card template.

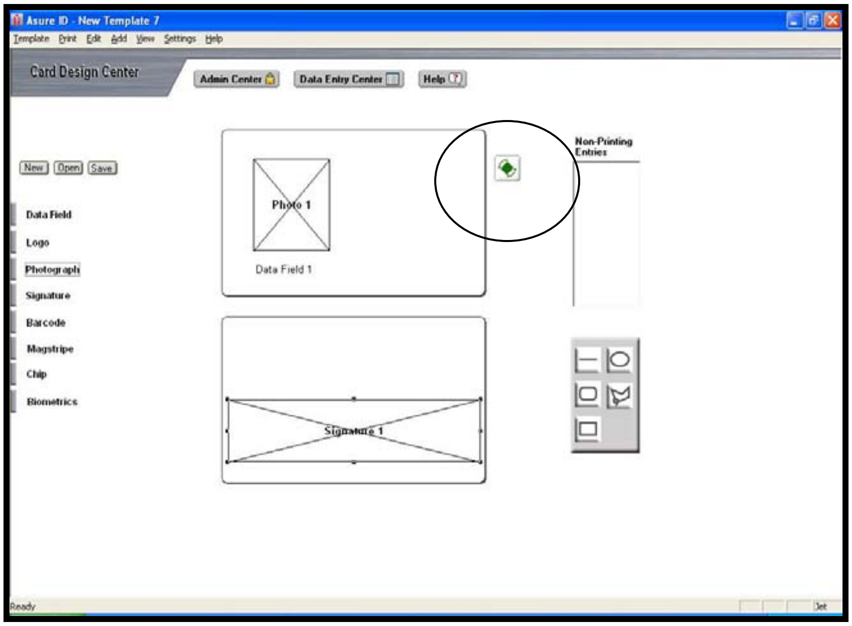
1. In the “Card Design Center”, ensure that you have a chip set up on your card template.

2. Call up the Chip Properties screen by clicking on the chip icon to the right of the front face of your card. The following screen displays:



3. Choose values from the “Brand” and “Type” fields for the type of cards you are using. **Example:** In the screen above the iCLASS brand and the iCLASS 16K/16 type were selected.

4. Click “OK” to save your choices. A chip will appear on your Card Design Center screen (see sample screen below). It is in this chip that your card data will be encoded.

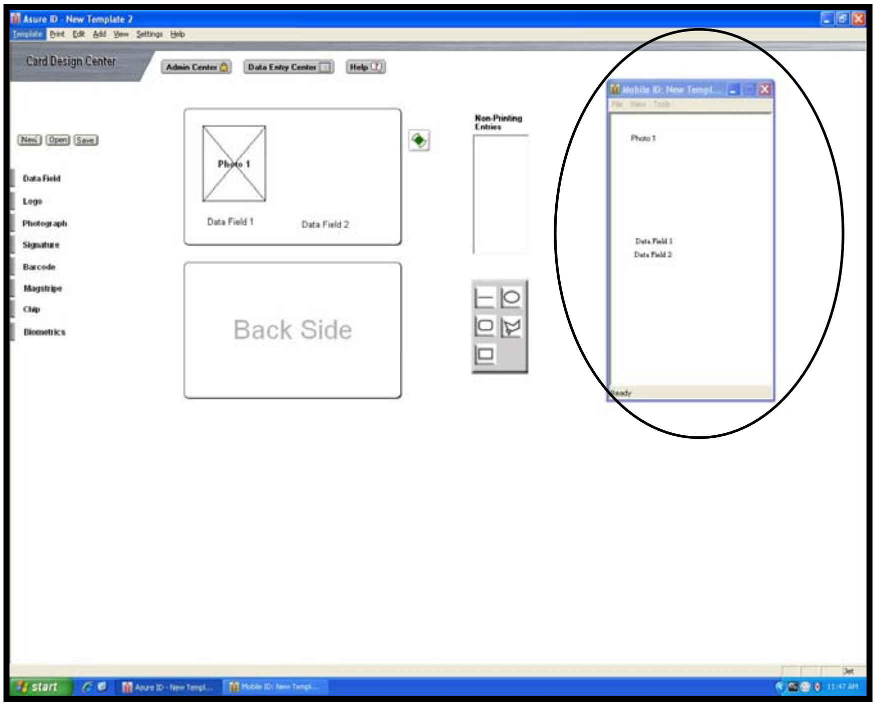


5. Click the "Save" button to save your card design template and proceed to section – "Create the Mobile ID Template".

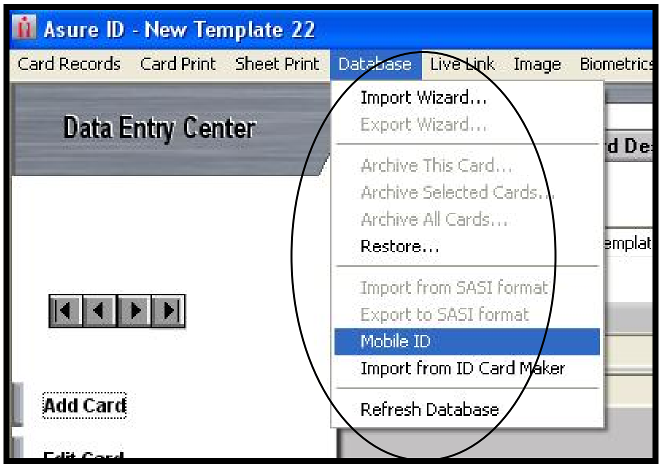
Create the Mobile ID Template

The Mobile ID template is the template that your handheld PC device will use to display the information that you encode into the card chip.

1. Click on "Template" then select "Mobile ID" on the "Card Design Center" menu bar. The "Mobile ID" screen displays.



Note: The Mobile ID template can also be called from the Data Entry Center. Use the menu bar to call up the Mobile ID template by selecting Database and then clicking on Mobile ID.



2. Fields from your card design will populate the Mobile ID template. You can move these fields around the Mobile ID template screen to create the layout you would like to see on your Handheld PC device. If you do not see a field that you created and you want to display it on your Mobile ID template, do the following:

   a. Click “View” on the Mobile ID Template menu bar.
   b. Click “Show Non-printing Fields…” from the drop down list.
   c. Select the desired field from the list of non-printing fields and click the “Show” button. The field is now displayed on your Mobile ID template.

Note: Only one of “Photo” field or “Signature” field can be displayed on the Mobile ID template. Mobile ID displays whichever of the two fields were added to your card design template first.

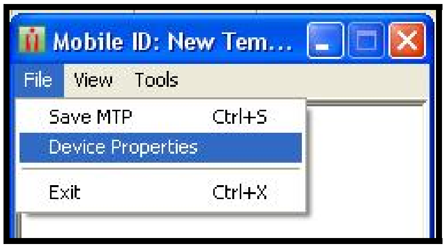
EXAMPLE: If you added your “Photo” field before you added your “Signature” field and you wish to display the “Signature” field on your Mobile ID template, complete the following steps:

1. On your “Mobile ID” template, right click the “Photo” field and click “Mobile ID: Hide”. Your “Photo” field is now hidden.
2. Click “View” | “Show Non-printing fields…” on the menu bar of your “Mobile ID” template.
3. Select the “Signature” field from the list of non-printing fields and click the “Show” button. Your Mobile ID template now displays the “Signature” field.

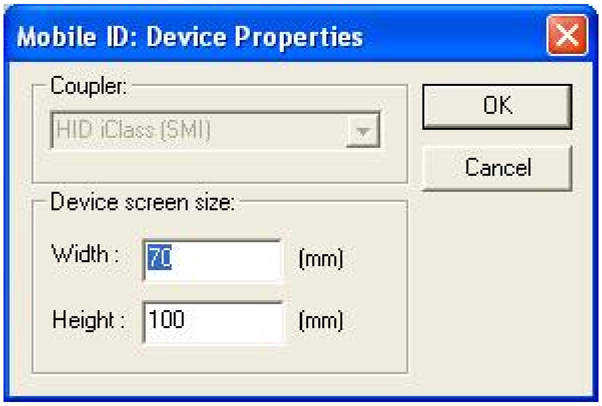
Set Mobile ID device properties

You can adjust the Mobile ID template properties to make the screen take on the layout of your Handheld PC device.

1. Click “File” and select “Device Properties” from the “Mobile ID” menu bar.



The following screen displays:



2. Complete the fields on the screen using the field chart below.

Field	Description
Coupler	This field is used to select the reader that will read the card. This field defaults to HID iCLASS (SMI).
Width	This field can be set to a value of 0 – 99999 mm. Set it to the value of the width of your Handheld PC.
Height	This field can be set to a value of 0 – 99999 mm. Set it to the value of the height of your Handheld PC.

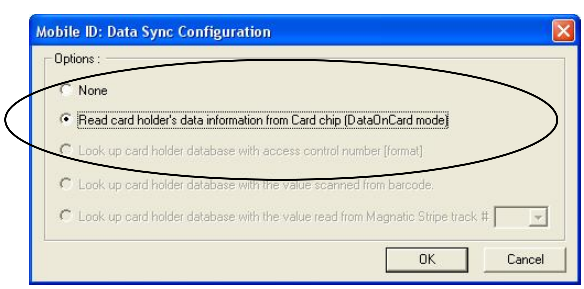
3. Save your Mobile ID Template. There are two ways to do this:
   - On the Mobile ID menu bar, select “File” and click on “Save MTP”.
   - Click CTRL + S from your keyboard.

Synchronize the MTP file

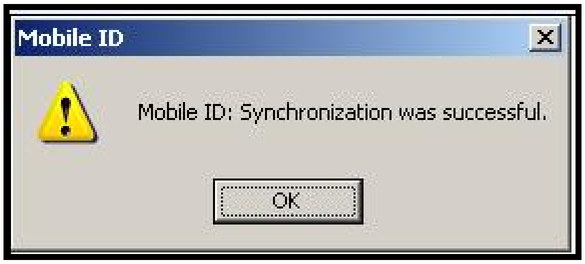
Note 1: Ensure that “Microsoft ActiveSync 4.5” is installed and configured and that a partnership has been established between the handheld PC device and your computer.
Note 2: Ensure that your handheld PC device is connected to your computer.

This procedure lists the steps to synchronize your MTP file to your handheld device.

1. Ensure your MTP file has been saved.
2. Select “Tools” from the menu bar and click on “Mobile Data Sync Configuration…” and select option “Read card holder’s data information from Card chip (Data on Card mode).



3. Select “Tools” from the menu bar and click on “Synchronize MTP file”. When the sync is complete the following dialog box displays.

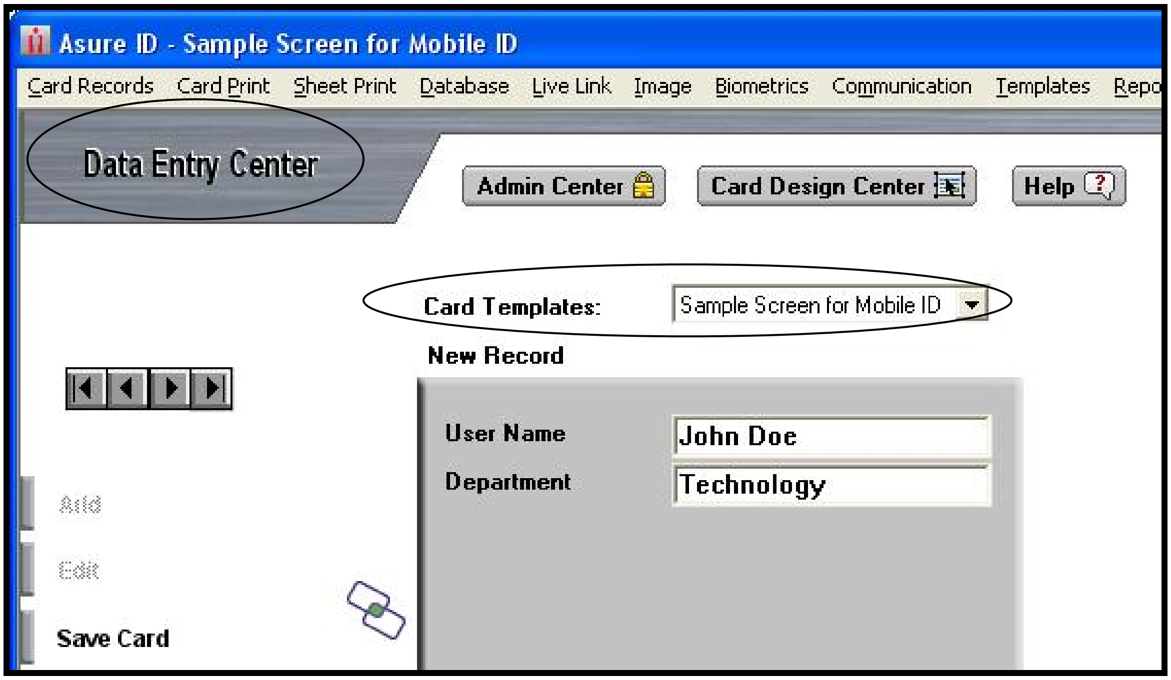


Perform Data Entry Center Steps

The Data Entry Center is where you add the cardholder records and personalized cards.

1. Open the Data Entry Center

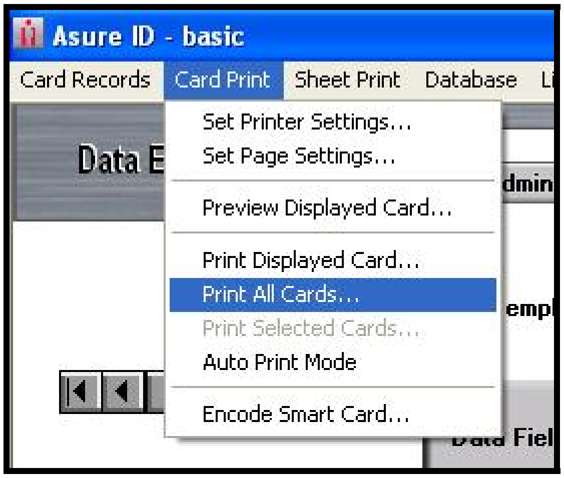
2. Select your card template from the drop down list in the "Card Templates" field.



3. Click "Add Card" to add the record information.

4. Click "Save Card" to save the information.

5. Click “Card Print” on the DEC menu bar and select “Print All Cards…”.



6. Complete steps 3-6 if you are issuing cards one at a time.

Note1: The steps to add the records and personalize the cards are not interdependent steps. You can separately add all the card holder records (e.g., step 3 and 4) and then personalize each card (step 6). Use the method that best suits your card setup needs.

Note2: If required, you may need to check your encoding settings before you print. To do this select “Settings” from the menu bar and click on “Advanced Encoding Settings”. Check that your encoding settings reflect the type of card you are using.

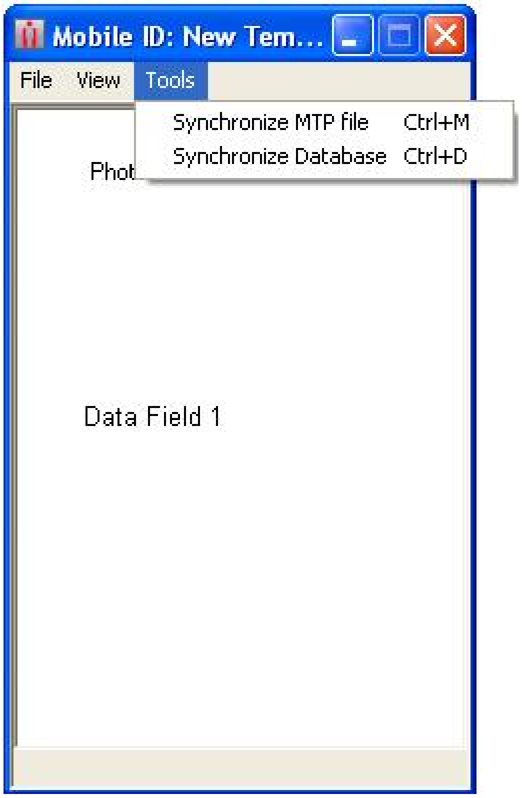
Request a Report

This section lists the steps you can take to request a report of the scans that were done on a handheld device.

1. Connect the handheld PC device to the PC where the database resides.

2. Go to the Mobile ID template.

3. Click on Tools and select "Synchronize Database"



4. When the syncing is complete, go to the Data Entry Center (DEC) screen.

5. Select "Reports" from the Menu bar and click on "Custom Reports". The "Report Writer Options" screen displays.

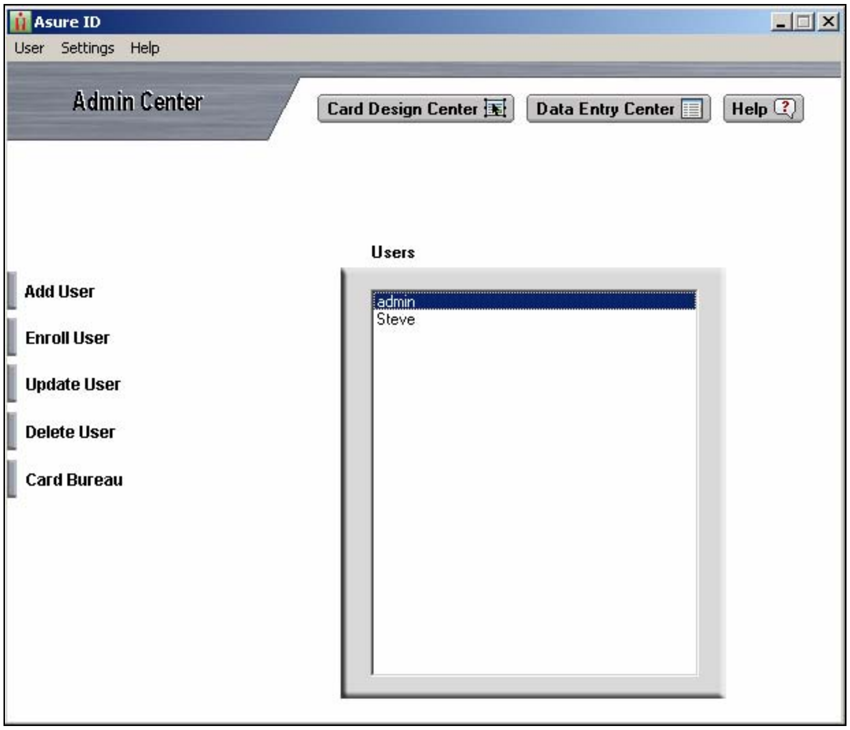
6. Complete the fields as follows:

Field Name	Value/Description
Report Name	Enter the name that you want to give your report.
Select by date	Click to add a checkmark to this field. Doing so enables you to select more options.
Select by	Click on the down arrow to the right of the field and select “Scanned on Handheld”
From	Click the date you wish to scan from. **Note**: The “from” and “to” dates will depend on how often you wish to report (daily, weekly, etc.)
To	Click the date you wish to scan to. **Note**: The “from” and “to” dates will depend on how often you wish to report (daily, weekly, etc.)
User Name	This field is grayed out for this report type.

7. Click on one of Run, Save, Save and Run to create your report.

Admin Center Detail

This section is designed to complement the information provided in the Quick Start Guide. Please ensure that you begin by reading the Quick Start Guide, and then proceed to this section if you need to find more detailed information. In this section you will find a comprehensive listing of all the options found in Admin Center, and their various functions.

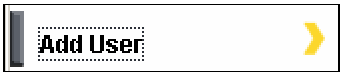


Admin Center Main Interface & Functionality

As described in the Quick Start Guide, the Admin Center of Asure ID is where you manage both your users and your communication with the Asure ID Card Service Bureau.

As you add users to the Asure ID system, the main '**Users**' area of Admin Center begins to fill, listing your users. You may have an unlimited number of users on the system, and they may (but do not have to) each have their own individual smart card.

Admin Center Function Buttons



Press this button to add a new Asure ID user and set his or her privileges. Please see below for more details.

Select to enroll the highlighted user with an Asure ID Card Service Bureau. An enrollment form will appear for you to fill out and submit.

Use to change privileges for a currently selected user. Any of the options that were set when the user was created may be modified.

Press to remove the currently selected user from the Users list, deleting his or her account.

Select this option to configure Asure ID to communicate with an Asure ID Card Service Bureau by entering the Server's IP address or URL (Such as 209.146.244.66, or perhaps asureserver.Asure ID .com).

Admin Center Navigation Buttons

Card Design Center: Use this button to quickly go from the Admin Center to the Card Design Center. Please note that you must have Card Design Center privileges assigned to your user profile for this to work. For more information on permissions, please see 'Asure ID Users and Privileges' below.

Data Entry Center: Press this button to quickly go from the Admin Center to the Data Entry Center. Please note that you must have Data Entry Center privileges assigned to your user profile for this to work.

Help: Select this button to launch the Asure ID online manual.

Admin Center Drop-Down Menu Items

Additionally in Admin Center, there is a drop-down menu bar found at the top of the screen. All of the Admin Center's function buttons have an identical menu item found here, useful for operators who like to memorize and use keyboard shortcuts. Some additional advanced options are also be found here.

- On the '**Settings**' drop-down menu, the '**Set Card Reader**' item may be used if you would like to change the smart card reader that you will use with Asure ID.

  You will be presented with a listing of the available (installed) card readers, and be able to change your active selection. Use this menu to add a reader for a user who was not using one, to remove a reader for a user who no longer wishes to use a smart card, or to change the active reader for an existing user.

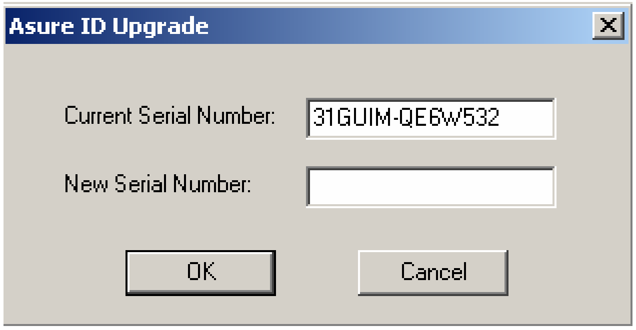
- Additionally on the ‘**Settings**’ menu, ‘**Choose Language**’ can be used to select from a list of available languages to see Asure ID button and menu labels in.

- On the '**Help**' drop down menu you will find three additional items:
  - **Asure ID User's Manual -** launch the User's Manual that was installed along with your software
  - **www.AsureID.com** - this item will take you to Asure ID’s webpage.
  - **About -** display the version and copyright information for your copy of Asure ID.

Asure ID Users & Privileges

As you learned in the Quick Start Guide, adding users to the Asure ID system is quite simple. This section will describe all of the options available when adding users. Please note that after you have created a user, you may change any of the user's attributes at a later time by using the '**Update User**' function button in Admin Center. The following dialog box sequence will appear for both the '**Add User**' and '**Update User**' operations.

Add or Update Users



User Name - This will be the name that the new user will use to login to the Asure system. User Names must be unique, so when creating a new user, you cannot use the User Name of an existing user.

Company - This field lists the Company name that was used when Asure ID was installed and configured. Please ensure that all copies of Asure ID within any one organization use that same company name if they will use an Asure ID Card Service Bureau. The value in this field cannot be changed.

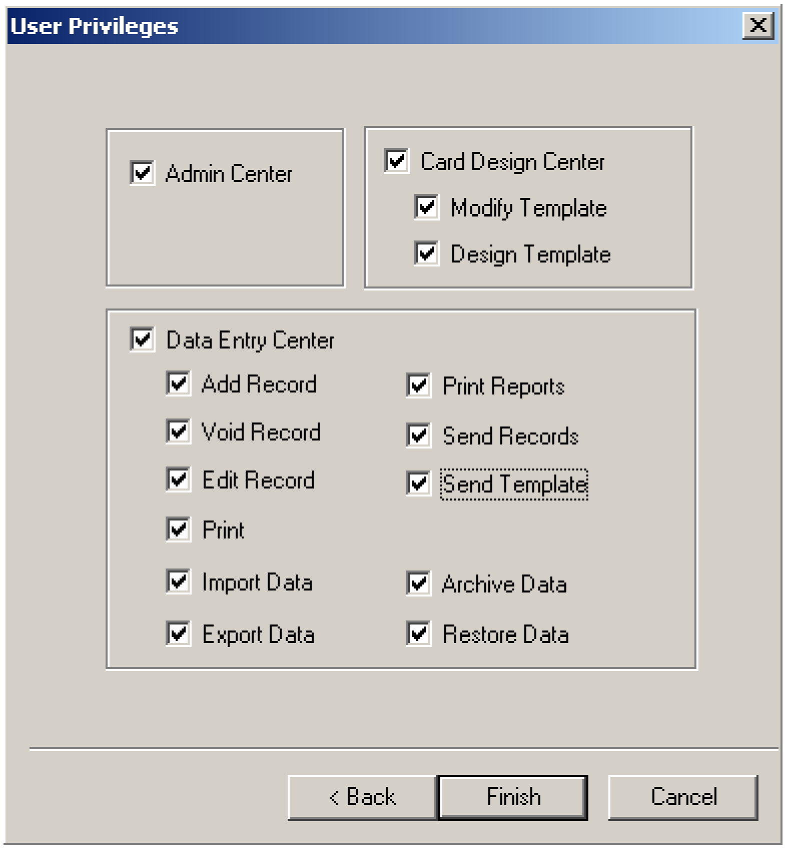
Password - Enter the password that the user will use when logging into Asure ID.

Confirm Password - Re-type the password again to ensure that you did not mistype it on the original entry.

After filling out these fields, press the '**Next**' button to set the User privileges.

User Privileges

In the User Privileges dialog box that will appear, you can assign or revoke access to almost every facet of Asure ID's operation. A check mark in the corresponding box grants access to the function, and a cleared box means that the feature will be unavailable to the selected user.



Admin Center: Grants the user access to the Admin Center and use of all the functions available there (i.e. Add User, Update User).

Card Design Center: Grants the user access to the Card Design Center.

Modify Template: Allows the user to modify a currently existing card template while in the Card Design Center.

Design Template: Allows the user to design and save a new card template while in the Card Design Center.

Data Entry Center: Grants the user access to the Data Entry Center.

Add Record: Allows the user to create new card entries for an existing template while in the Data Entry Center.

Void Record: Allows the user to void existing card entries while in the Data Entry Center.

Edit Record: Allows the user to edit previously entered cards within Data Entry Center.

Print: Allows the user to print the currently selected card on a local printer without submitting in to an Asure ID Server. Additionally this privilege allows the user to perform a print preview operation.

Print Reports: Allows the user to request and print activity reports for users of the Asure ID software.

Send Record: Allows the user to send card records to the Asure ID Server.

Send Template: Gives the user rights to send new card template data to the Asure ID Card Service Bureau.

Import Data: Allows the user to import information from an external source into the card template database.

Export Data: Allows the user to export information from the card template database into an external source.

Archive Data: Allows the user to archive and delete card records from the card template database.

Restore Data: Allows the user to restore card records that have been previously archived from the template database.

When working with the User Privileges, please be aware that if you would like to enforce any specific set of privileges for a given user, it is important that you do not grant that user access to the Admin Center. If you do, the user will always be able to update his or her User Profile, this nullifying any attempt that was made at revoking specific functions.

When you are satisfied with the configuration of your User Privileges, press the '**Finish**' button to save the changes to your user, thus completing the Add User or Update User operation.

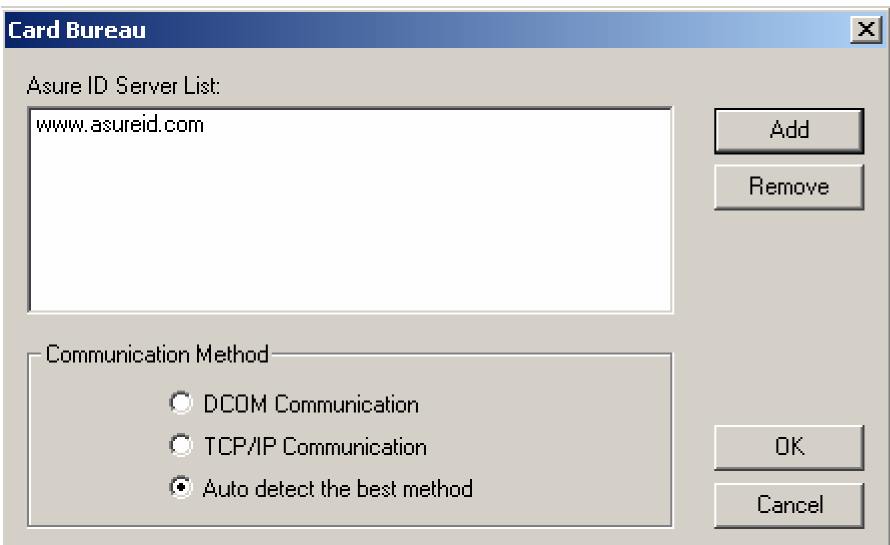
Asure ID Card Service Bureau Enrollment

Along with letting you add and manage your Asure ID users, Admin Center is also the place where you will manage communication with the Asure ID Card Service Bureau. These Bureaus make it a snap to securely transmit your cards over the Internet and have them printed on professional equipment within minutes! Your Asure ID Authorized Partner will give you the necessary information to help you decide which card bureau you should use, or you may contact Asure ID technical support directly for further information on the availability of additional Asure ID Card Service Bureaus.

After you have contacted an Asure ID Card Service Bureau and received the necessary information, there are two things you need to do before you will be able to send cards to the Bureau - set up the communication parameters, and register your users.

Setting Up Communications

As described in the Quick Start Guide, pressing the ‘Card Bureau’ Function Button in Admin Center configures communication with the remote Asure ID Card Service Bureau. This will bring up the dialog box shown below:



You will need to press '**Add**' to enter the address of the bureau (which you would receive when you contact them) into the space provided, and then press "**OK**" to save the setting.

This needs to be done so that your Asure ID software will know where to send the cards to! The address may be entered in any one of three formats:

- IP Address - ex. 209.146.244.55
- URL - ex. www.yourservicebureau.com
- Hostname - ex. \\Computer1

Please note that the '**Hostname**' format will only work if the Card Service Bureau's Asure ID Server computer is on the same network as your computer.

The IP Address format is recommended, as it is the most reliable.

After you have set the Service Bureau Address, your Communication configuration is complete. You will not need to set it again unless you need to use an Asure ID Card Service Bureau at a different address.

Using the '**Card Bureau**' dialog, you may also configure the communication method to be used with the Asure ID Server. The options are **DCOM Communication**, **TCP/IP Communication** and **Auto Detect**.

DCOM provides the most security, however also has a lot of overhead (resulting in slower transmission), and can be difficult to configure for use if you are behind a firewall or proxy server. **DCOM** is recommended only for users who are directly connected to the Internet, and are not using a firewall or proxy.

TCP/IP communication is the most compatible, and uses port 80 and 1281 (bidirectional). This communication method is recommended for users who are on a corporate network, behind a firewall, or behind a proxy.

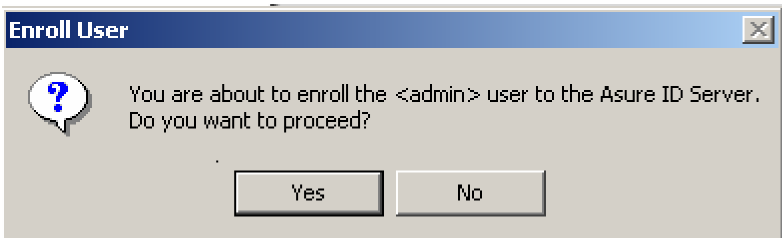
If you are unsure about which communication method to select, please choose **Auto Detect**. When this setting is selected, Asure ID will attempt to connect to the Asure ID Server using first DCOM, and then TCP/IP protocols.

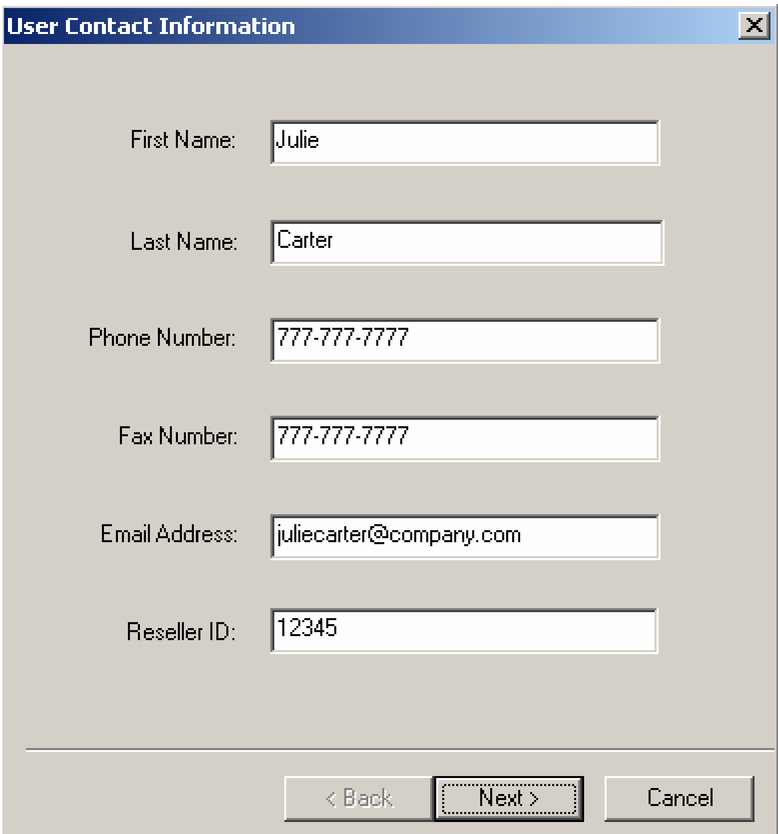
Enrolling Users

Before any user of the Asure ID system will be able to transmit cards to the Card Service Bureau, they will need to enroll with that bureau first.

Unless you change Card Service Bureaus, this is a '**one time only**' operation for each Asure ID User, and it is required in order to provide the Card Service Bureau operators with some information (such as shipping and billing addresses, contact numbers, etc.) about the person transmitting cards.

To begin the user enrollment process, select the user that you want to register from the User List, and then press on the '**Enroll User**' Function Button found on the main Admin Center window. The following sequence of dialog boxes will appear:



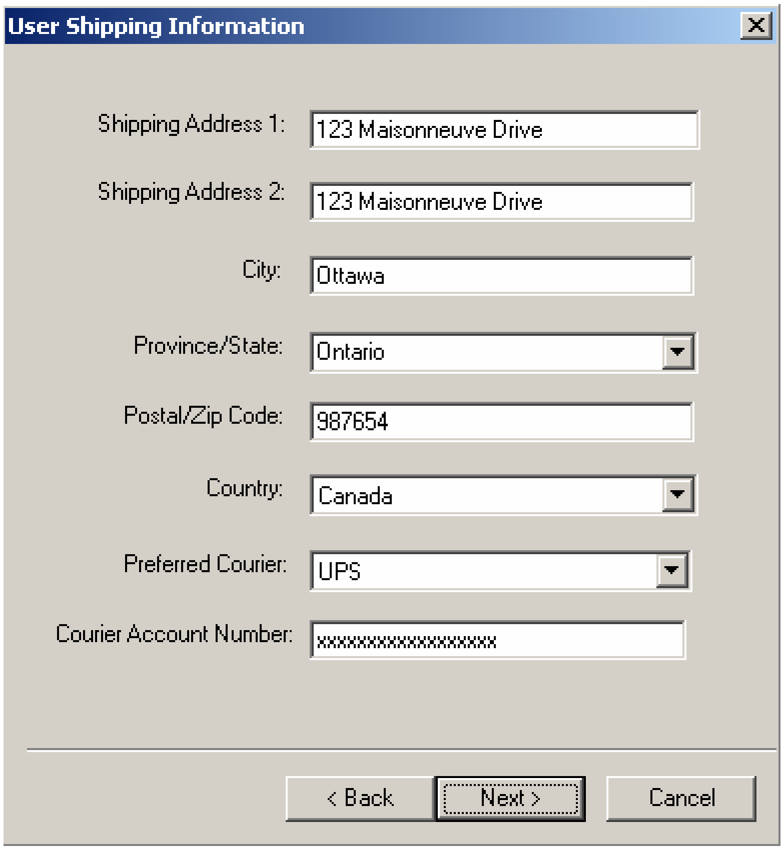


User Contact Information

You must enter the correct contact information for the user being enrolled, so that the Asure ID Card Service Bureau can get in touch with this user if needed.

Fill in all the fields (note that Fax Number is optional) and then press '**Next**' to continue to the User Shipping Information window.

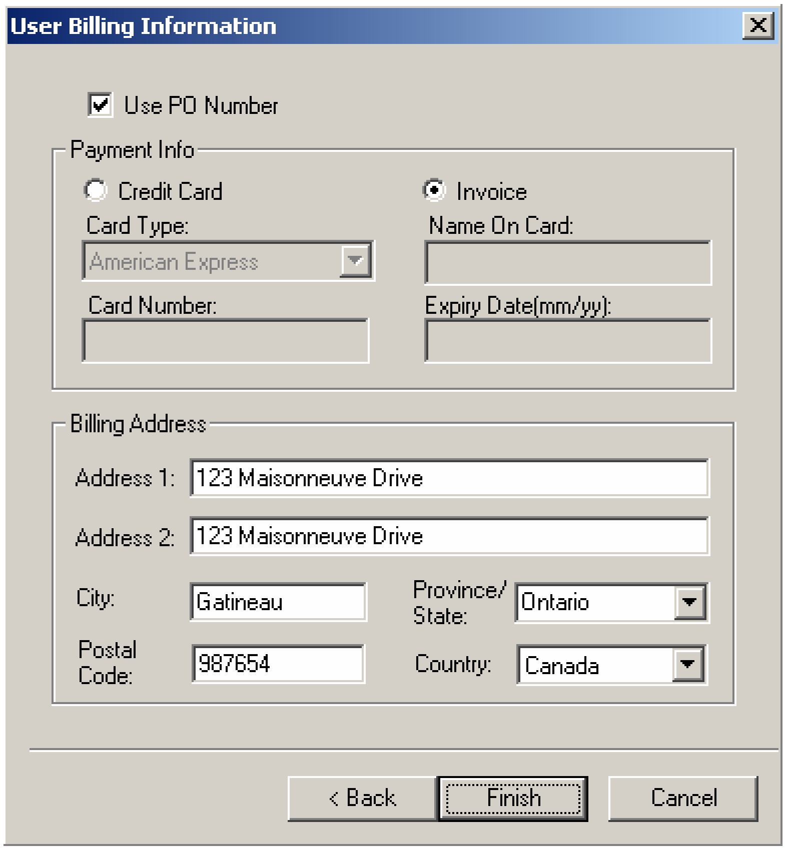
User Shipping Information



This page allows for precise shipping information, including courier and account information, to be transmitted to the Card Service Bureau. Fill out the form with the appropriate information, and press ‘Next’ to continue to the Billing Information page.

User Billing Information

In this section you can set the options for how you would like to be billed by the Asure ID Card Service Bureau for your produced cards. If you have already come to an arrangement with the Card Service Bureau, please choose the options here that reflect that agreement.



If you select '**Invoice**', then a bill will be shipped to the billing address for the production of your cards. If '**Credit Card**' is selected, you may choose from various card types, and enter a cardholder name, card number and expiry date. In this case your credit card will be billed for the card production. Please note that the information in this form will be encrypted before being sent from your computer and that you can rest assured that your credit card number is safe to transmit in this format.

The third option is '**Use P.O. Number**', and when this is selected, the user will have the option to enter a P.O. number for billing at the time that each card transaction is sent to the Asure ID Card Service Bureau.

When you have entered all of the correct information, press the '**Finish**' button to transmit your enrollment request to the Card Service Bureau.

Please note that you must have an active Internet Connection, as well as have completed the Admin Center Communication configuration (as discussed above) for the enrollment request to be sent to the Card Service Bureau.

Within a few seconds you should receive a message stating that the user has been successfully enrolled. Congratulations! This user is now able to send cards from Asure ID's Data Entry Center to the remote Asure ID Card Service Bureau for printing!

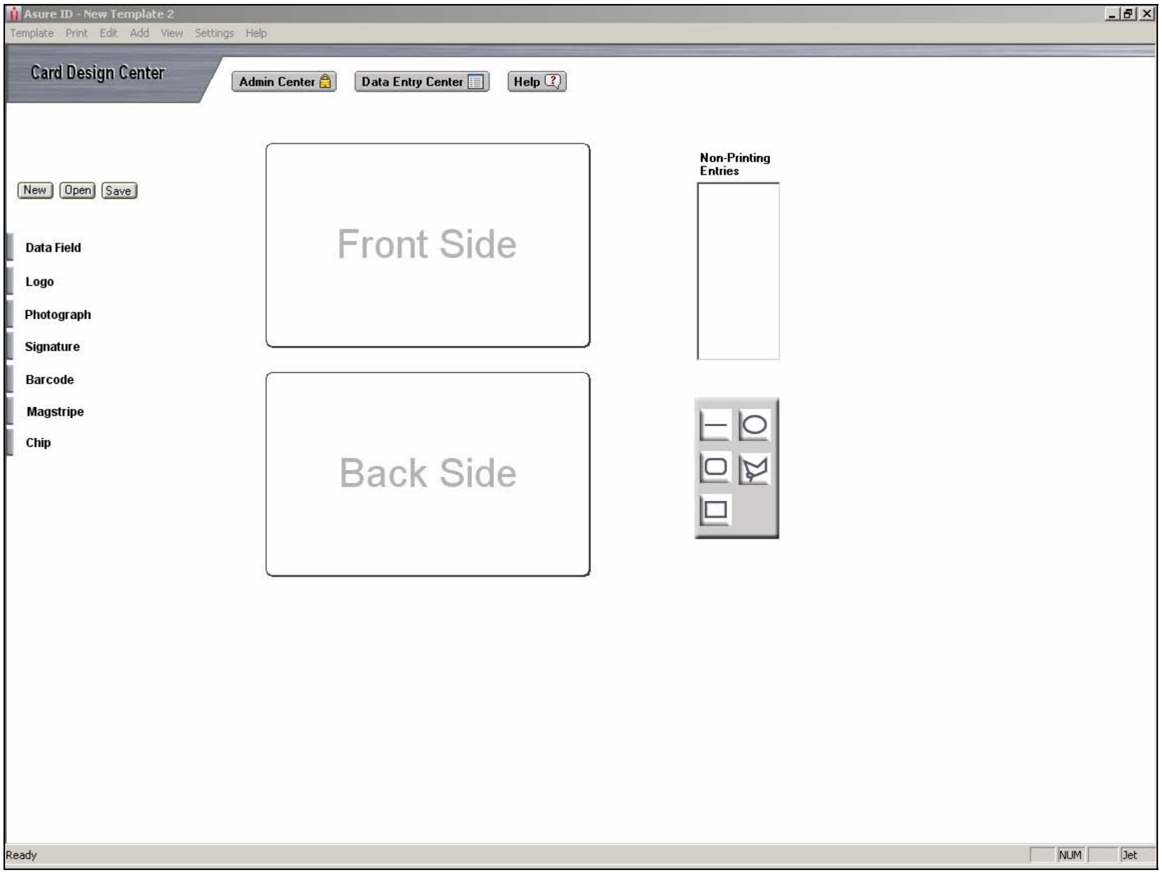
Card Design Center Detail

This section is designed to complement the information provided in the Quick Start Guide. Please ensure that you begin by reading the Quick Start Guide, and then proceed to this section if you need to find more detailed information. In this section you will find a comprehensive listing of all the options found in Card Design Center, and their various functions

Introduction

Asure ID's Card Design Center is where you will create templates for new cards, either from scratch or by modifying existing templates. It is here that you decide what your cards will look like, what types of text and data they will hold and display, and what types of special features (such as magnetic stripes or barcodes) they will incorporate.

This is all done through a simple drag-and-drop visual interface, while Asure ID takes care of creating a custom database for you 'behind the scenes'. The benefit of this approach is that no database programming knowledge or skills is needed to use Asure ID. In this section you will find a comprehensive listing of all the options found in Card Design Center and their various corresponding functions.

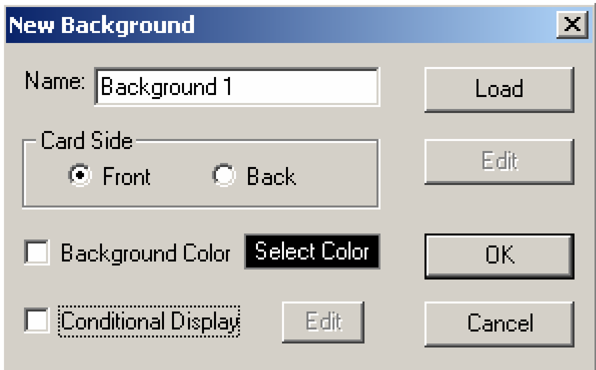


About Card Templates

Card Template **Front** and **Back**: These two areas represent the appearance of the card you are designing, and will be used to place your photo, signature, logos, data fields, magstripes, barcodes, and any other elements in your card's design. After any of these elements have been placed on the card, they may be repositioned by dragging them while holding down the left mouse button, or by single-clicking to select one and using the arrow keys on your keyboard. If you hold down the <**SHIFT**> key while using the arrow buttons, you will resize the selected field without moving it.

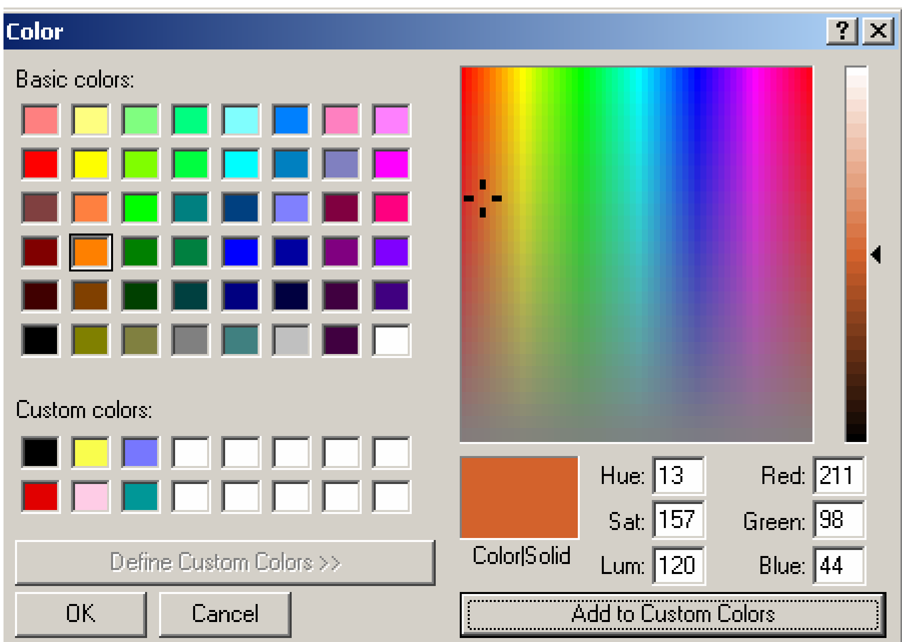
Add a Background

There are three different ways to add a background to the card. You may simply double-click on the card area as shown, right-click on the card and select '**Add Background**' or choose '**Add**' then '**Background**' from the drop-down menu bar at the top of the screen.



When the '**New Background**' window appears, press the '**Load**' button to load an image file for the background, or check the '**Background Color**' box to use a color instead.

If you select this box, you will need to click on the '**Select Color**' area to choose a custom color from the Windows color palette.

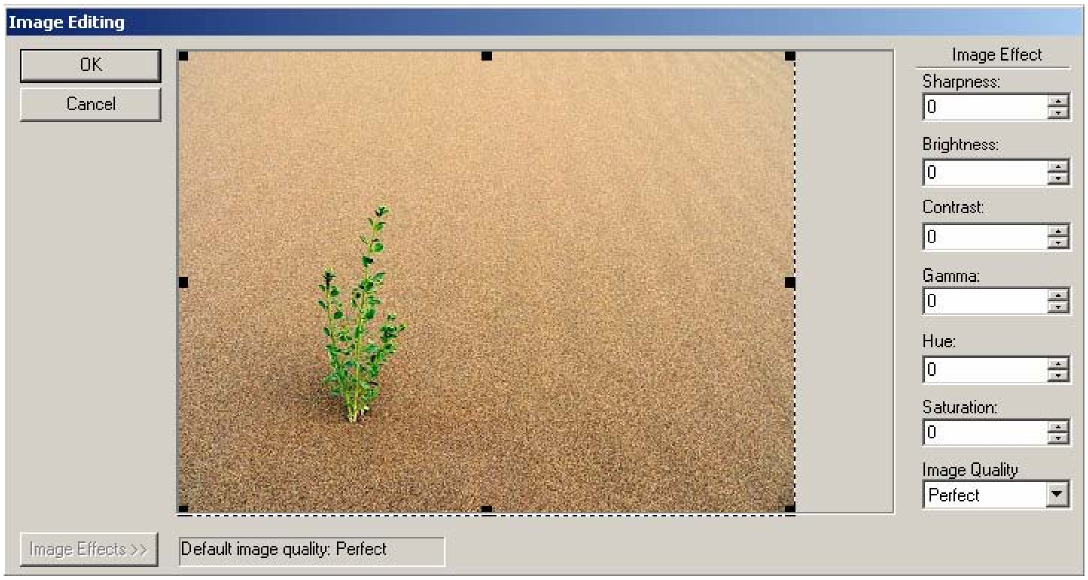


If you would like to use '**Conditional Display**' in conjunction with one or more background images, select the '**Conditional Display**' option in the '**Add Background**' dialog box. More information about configuring Conditional Display is available further on in this chapter.

Additional backgrounds (for use with conditional display) may be added by right clicking on your card and choosing '**Add Background**' again, and when multiple backgrounds are in use, this right-click menu will list them, allowing a different background to be chosen for display. If you are using multiple backgrounds with conditions, it is a good idea to add one that does not use a condition. This background will display when none of the set conditions have been matched for a given cardholder.

Editing Images

After you have loaded an image, you can press the '**Edit**' button to perform various image enhancements such as cropping and adjusting contrast, brightness, etc. A window will appear (shown below) giving you various image editing options, including image cropping. You can change the size of the area you wish to crop (select) by holding down the left mouse button, dragging the outline '**frame**' over the area you want to select, and then releasing the mouse button. If you do not want to crop the background image at this time, simply press the '**Cancel**' button to use the entire image un-cropped.



Additionally, on the cropping window, you see a number of control items along the right-hand side of the window. These controls allow you to adjust various elements of the background, and provide greater control over the appearance of your image. This cropping-window, along with it's adjustments, are a '**common dialog**' within Asure ID, and the identical options are also available in Data Entry Center whenever you add any image-based item (such as Photographs, Signatures, Fingerprints and Retina Scans), or in Card Design Center when adding logos and background images.

When working with this dialog, all adjustments are made with the available controls, and the changes are in real-time, updating your image as the adjustments are made. It is important to note that any time you load an image file into Asure ID, the software automatically makes a copy of the original image, and will only work with this copy. Under no circumstances do you need to worry about making edits or changes to an original image file!

Below you will find a description for the various adjustments made on the common image editor window:

Sharpness - Adjusts the sharpness, or 'crispness' of the image. Adjustment range is between 0 (lowest possible) and 100 (maximum sharpness.)

Brightness - Controls the amount of brightness in the image. Adjustment range is between 0 (complete darkness) and 100 (full brightness - a white image).

Contrast - Regulates the amount of contrast in the image, or, the amount of median difference between light (white) and dark (black) colors. Adjustment range is between 0 (no contrast) and 100 (full contrast).

Gamma – Gamma controls the white balance of the image.

Hue - The hue adjustment allows for the adjustment of colors in the image. For example if you are capturing images in an area with too much blue light (giving an undesired bluish tint to the image), then this discoloration may be compensated for with the Hue adjustment. Different levels of this control will affect different colors in the image. Adjustment is made between 0 and 100.

Saturation - Saturation controls the amount of white color used in the image. It is similar in function to brightness, but when using saturation even very dark images can be made to look '**white**' without increasing brightness. Adjustment range for this control is from 0 (no saturation) to 100 (full saturation).

Transparency - Adjusting this control allows you to create a transparent or '**see-through**' image. This will allow items that are behind the image in your card design show through, at least partially. Adjustment is made from 0 to 100, and the selection is represented as '**percentage transparency**'. For example, setting this control to '**50**' makes your image 50% transparent. Setting it to 90 would mean that your image is 90% transparent, or in other words, barely visible! You can use the transparency adjustment to achieve '**ghosting**' effects on your card designs.

Chromakey - The Chromakey adjustment allows for '**color matching**' when adding images to your card in Asure ID. This control will adjust the main background color in the image you supply, to match the color of other items on the card. Adjustments are made between 0 and 100, and represent the amount (or '**strength**') that the Chromakey feature will use to override the default colors in your image.

When selecting Chromakey, you will notice two radio buttons below the Chromakey item, asking you tell the software what color should be matched. The options here are '**Auto**' and '**Manual**'.

If '**Auto**' is selected, the Chromakey function will attempt to detect the color that is immediately behind your image, or if none, the color that is the most commonly used around the image, and use this color for matching.

If '**Manual**' is selected, you can press the '**Pick Color**' button, to select a color to be used for matching. Upon the configuration of the Chromakey item, the background color of the supplied image will be adjusted in an attempt to match the selected color.

Keep Ratio - When this check box is selected, the area of the image that is cropped or captured will always be forced to maintain the aspect ratio of the original image. When capturing photos, signatures, fingerprints and retina scans in Data Entry Center, it is strongly recommended that you check this item. Failure to do so will create a situation where you are using an arbitrary (defined by your selection) aspect ratio from one image to the other and you will end up with inconsistent image sizes from one card to another.

Non-printing Entries

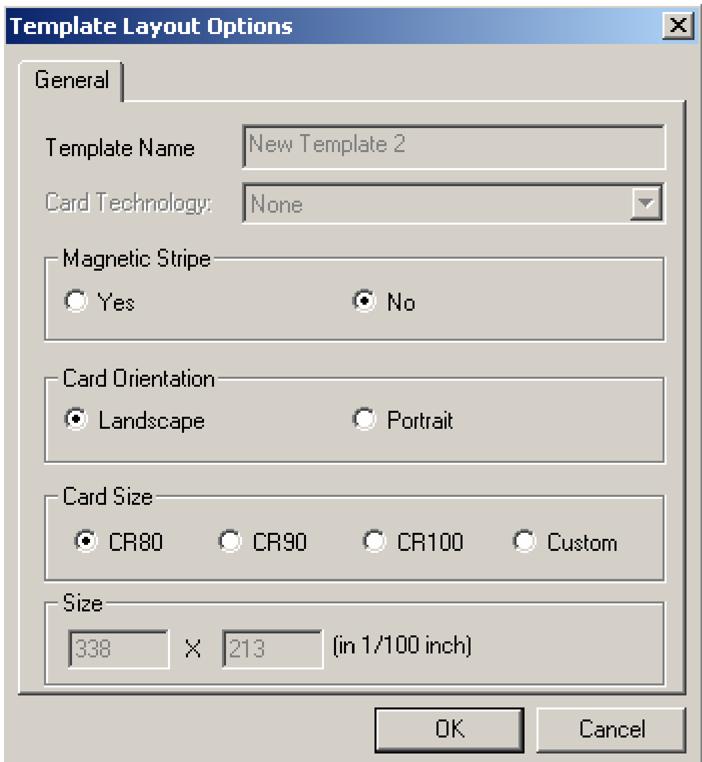
This area, found in the upper-right hand area of the main Card Design Center window, lists the data fields your card can hold that are not printed on the card itself. This feature makes it possible to use Asure ID's database to track sensitive information about a cardholder that should not necessarily be displayed on the card's surface. These fields are not transmitted to the Asure ID Server when (and if) card records are sent for remote printing, but these fields may be used with database operations from within Asure ID. To create a **non-printing entry**, simply click in this area rather than on the card itself after selecting the 'Data Field' button (or you may select the 'Non-Printed Entry' option on the dialog box for new text fields).

Card Design Center Function Buttons

In this section you will find a complete description of the functionality provided by the main Function Buttons, found along the top and left-hand edge of the main Card Design Center interface.

New Template Button

Select this button to begin creating a new card template. It is important to remember that the template data for new templates must be sent to the Asure ID Server before you send any card records entered into that template. After selecting the '**New**' option, you will be prompted to choose the layout of your new card design (Portrait or Landscape), the size of card you want to create (CR-80 - standard size, CR-90 - larger, CR-100 - oversized card, or ‘Custom’), any technology components (such as contactless smart chips) and a name for the new card template. If you select ‘Custom’, you may enter the dimensions that you would like to use.



Open Template Button

Select this button to continue working on or to edit an existing card template. After selecting the 'Open' option, you will be presented with a list of all the current templates, and may choose the one you would like to open.

Save Template Button

Select this button to save the current template. If it has already been saved, you will be prompted to confirm that you want to overwrite the existing template. If you would rather save it under a new name, press '**Cancel**', and select '**Save Template As…**' from the '**Template**' drop-down menu.

Data Field Button

Select this button to add a data field either onto the card itself, or into non-printed entries. After clicking on the '**Data Field**' button, the cursor will change to a 'crosshair' cursor, and you can place the field by clicking either on the front or backside of the card, or in the non-printed entries area. You may place up to 200 data fields on any individual card template. After selecting where you want to place the field, a dialog box will appear detailing various options for the new data field. These options will be described in detail below.

Editing and Moving Data Fields

After a data field has been placed on the card, its options dialog box can be reopened by double-clicking on the field itself (either on the card surface, or in the non-printed entries area), or by right-clicking and selecting '**Properties**'. Also, after data fields have been placed, they can be resized by clicking on the border of the field and dragging it while holding down the mouse button, or by holding down <**SHIFT**>while using the arrow keys: **left** and **right arrows** to adjust the width, and the **up** and **down arrows** to adjust the height.

Existing data fields can also be moved to a different position by clicking in the center of the field and dragging it to a new location while holding down the mouse button, by single-clicking and using the arrow keys on your keyboard, or by adjusting '**Screen Parameters**' within the fields options dialog box. When moving data fields around on the card, the field will jump, or '**snap to**' the closest grid point on the card. The snap-to function can be disabled, or the grid points adjusted, by using the '**Grid Settings**' item found on the '**Settings**' drop-down menu at the top of the screen.

The data field can be removed from the template (as long as no cardholder data has been entered into the database for this template) by selecting it with a mouse click and pressing the <**DEL**> key, or by right clicking on it and choosing '**Remove Field**'.
Finally, all individual items on the card (such as data fields, logos, etc.) may be viewed in a database table format by selecting '**View**', '**Show All Objects**' (from the drop-down menu at the top of the screen). Items in this table view may be selected for editing by clicking on the item, then the **Edit** button.

Note that if you make a mistake at any point in Card Design Center (whether moving, adding or changing items), it can be easily fixed by selecting '**Edit**' and then '**Undo**' from the drop-down menu bar at the top of the main Card Design Center window.

Layering Fields

Data fields, along with all other fields created within the Card Design Center (such as **logos**, **signatures**, and **photograph fields**), may be layered either above or below another field that is either partially or completely overlapping it. To set the layering option for a field, select the field by single clicking on it, then right click over the field and select either '**Layer Above**' or '**Layer Below**'. You can set the layering options for any number of fields that overlap each other.

Please note that the field layered at the top ('**Above**') will print and display in its entirety, while fields layered below will only display that portion of themselves not covered by a higher layered field (Assuming that there is no transparency enabled for the uppermost item). When layering multiple fields, it is a good idea to perform '**Print Preview**' operations to ensure that the fields are being displayed the way that you have intended.

Copying Fields

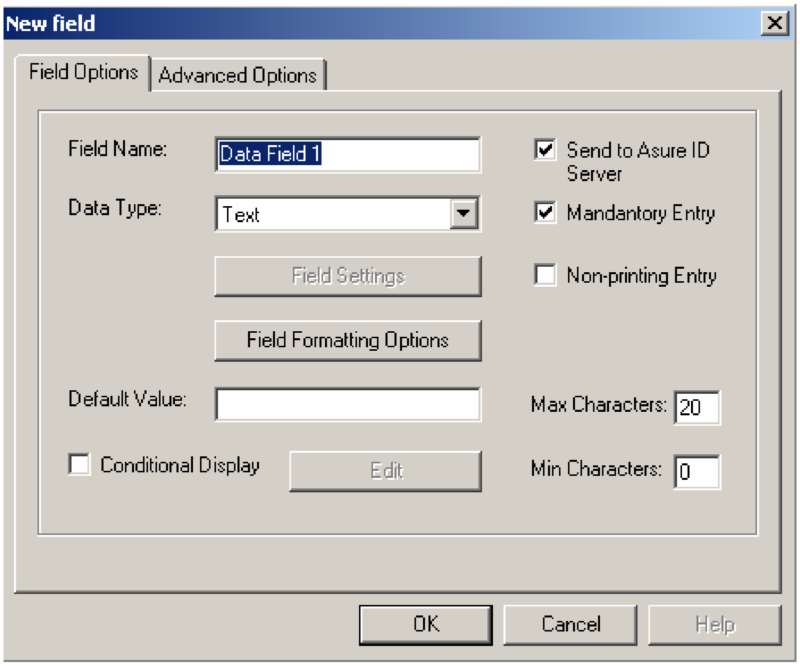
After a data field has been placed on the card, it may be copied to a new location. Please note that this will create a **new** data field, which has simply copied the properties of the original, and you will need to enter a new name for this field.

To copy a field, simply right-click on the field, select '**Copy**', then right-click on a different area of the card and select '**Paste**'. After selecting '**Paste**', the properties menu for the new copy will appear, allowing you to type a new field name.

Data Field Options Dialog Box

This box appears when entering a new data field, or when editing an existing one (either by double-clicking on any existing data field, or by right-clicking and selecting '**Properties**'). The contents of the options dialog box are broken into two '**tabbed**' sections as displayed below:

- Field Options
- Advanced Options



Field Options

On the '**Field Options**' tab, the following functions are available:

Field Name - Type the name, or label, of the new field you are creating here. This will be the label used to prompt the user for what type of data should be entered into the field. For example, if you were creating a field to hold an employee's card number, it would be a good idea to use '**Card Number**' for the '**Field Name**'.

Data Type - Please refer to the subtopic below for further detailed information on each of the available 'Data Types'.

Field Settings - This item is normally grayed-out, unless you have selected the ‘Label’ data type, in which case this button will launch the Label Text Editor.

Field Formatting Options - Pressing this button brings up the '**Field Options**' dialog box (refer to subtopic below for further details), which allows for advanced formatting options for your data field.

Default Value - You can use this option to create a default value for a field. This can potentially save a lot of time when entering card data in the Data Entry Center if many cardholders will have a common entry. A good example of the '**Default Value**' at work would be for a department field - if you know when designing your card that 90% of the cardholders are in the 'Sales' department, it would make good sense to set 'Sales' as a default value for this field, thus saving time for the data entry operators who will be entering cardholder data.

Conditional Display - This option is available for almost all items that can be placed on the card template: data fields, photographs, signatures, logos, backgrounds and barcodes. Using conditional display creates a rule so that the item will only be displayed on the card if certain criteria are met. When you select this item, you will be presented with a dialog box (refer to subtopic below for further details) that can be used to configure the conditional display.

Send to Asure ID Server - This item is enabled by default. Deselecting it will prevent the data contained within a field from being transmitted to the Asure ID Server. Note that disabling this option for fields that appear on the card itself will cause the cards to look different (i.e. the field will not be displayed) when the Asure ID Server prints them.

Mandatory Entry - When this item is checked, the field is required to contain a value for each card in Data Entry Center before the card can be saved. Clearing this item will allow the field to be left blank when entering card records.

Non-Printed Entry - If you have a data field that is not to be placed on the card itself, you may move it to a non-printed entry by checking this box.

Max Characters - This option can be used to specify the maximum number of characters allowed in a field. Please note that Data Entry Center will not allow more characters than set here to be entered into the field.

Min Characters - This option can be used to specify the minimum number of characters allowed in a field. Please note that Data Entry Center will not allow a card to be saved less characters than set here are entered into the field.

Data Types

When adding a new Data Field to the card design, the following ‘Data Types’ are available to the user:

Text - (supporting all characters)

Number - (numerical characters only)

Date - (with options for various formats)

Label (Basic) - (simple static text - no data entry for this type)

Label (Rich Text) - (RTF compatible static text - no data entry for this type)

List - (creates a configurable drop-down menu)

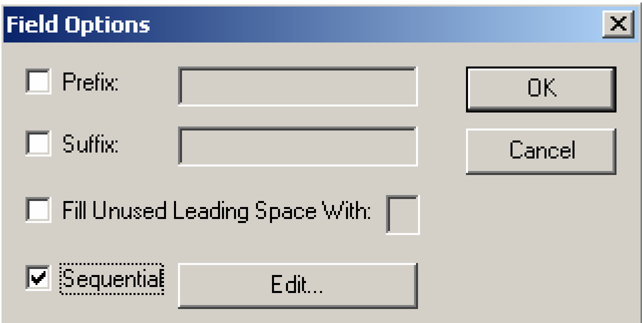
True/False – (creates a ‘yes/no’ or ‘true/false’ Boolean field)

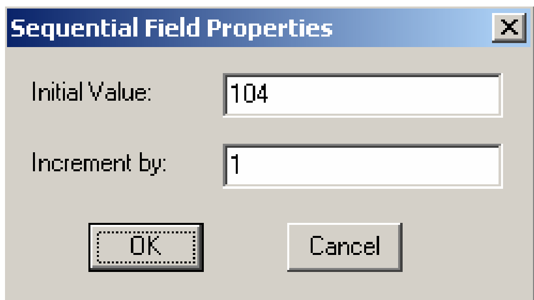
Further details on these data types can be found below.

Number Data Type

Selecting the '**Number**' data type presents one additional option:

A button labeled '**Field Formatting Options**' will become available. Selecting this option will bring up a box entitled ‘**Field Options**’ (shown below). The settings found on this page allow the user to configure an auto-incrementing (or '**global counter**') field, which is unique to the Number data type. To create a global counter, check the ‘**Sequential**’ check box to bring up the ‘**Sequential Field Properties**’ dialog box as shown in the second screenshot below.



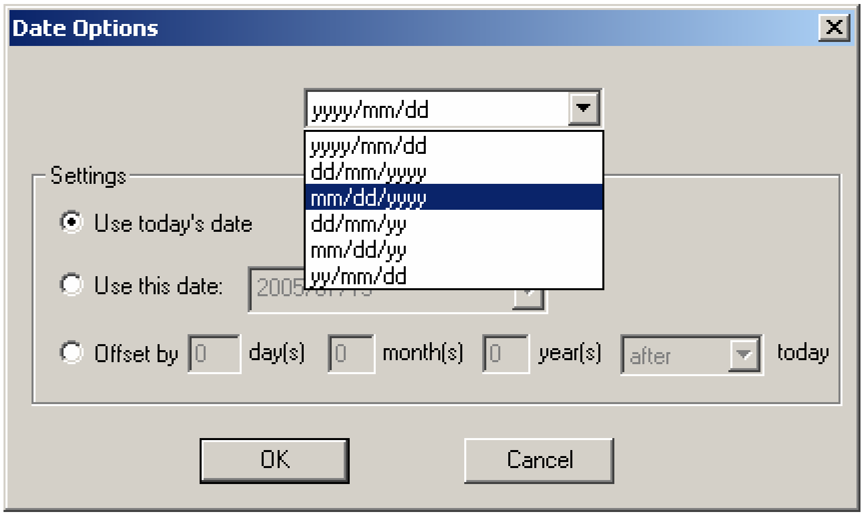


Configuring this item will force the value contained within a field to automatically increment with each card record that is added to the database in Data Entry Center. When setting the '**Sequential Field Properties**', you need to specify the initial value (for the first card), as well as the numerical amount that you wish this value to be incremented with each successive card record entry. Additionally, this dialog gives the user the option to specify the final value used by the counter, after which point no further cards may be added to the template database.

When working with the global counter, there are a couple of things that the user needs to keep in mind: If a global counter is added to a card template that already has records saved to the database from Data Entry Center, those records that were entered '**prior**' to the addition of the counter should not be edited after the addition of the counter. Doing so will cause for inaccuracies with the values assigned by the counter. Secondly, when performing archive/restore or import/export operations on a template with a global counter, if identical global counter values are imported back into Data Entry Center they will have a decimal point followed by a zero appended to their global counter values (so as not to create duplicate entries).

Date Data Type

If you select the '**Date**' data type, a dialog box (shown below) will appear, giving you options to configure the '**Date**' field.



From the drop-down menu on the '**Date Settings**' window, you can choose the date format that you would like to use with the new field. All popular date formats are available, and the software will ensure that this format is maintained when entering dates. Additionally, there are various other settings that are available on this configuration screen:

Use Today's Date - Selecting this item will ensure that the current date will automatically be entered into the date field whenever a new card is added to the template's database in Asure ID's Data Entry Center.

Use This Date - Selecting this item will let you enter a specific date value, which will then by default be used for all newly created cards in Asure ID's Data Entry Center.

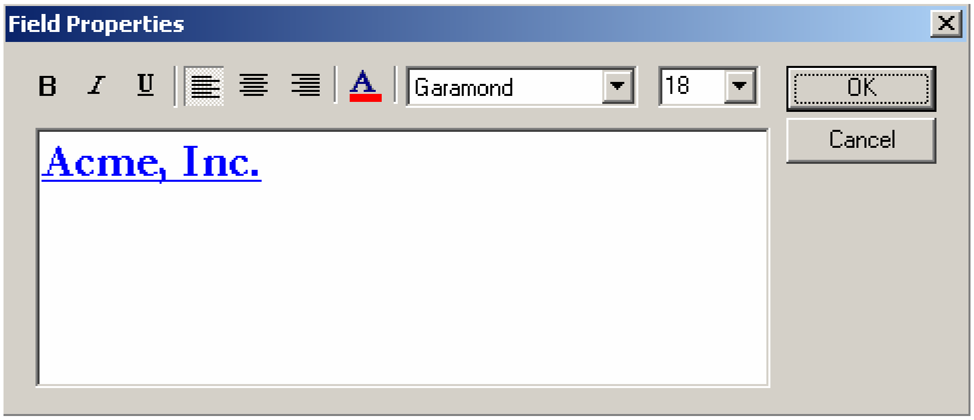
Offset By… - Selecting this item will allow you to use some advanced logic when entering dates in Asure ID's Data Entry Center. You can set the offset in **days**, **months** and **years** from the current date, either before or after. This is very useful for expiry dates where you want cards to automatically have an expiry date that is (for example) two years from the date the card was issued.

Label Data Type

The '**Label**' data type is the only data type that can be placed on the card that will **not** create a field for data entry in the Data Entry Center. If you would like your card to have 'fixed text', (for example, to say '**Acme Inc.**'), without having to enter this on a card-by-card basis, then the Label is the data type you should choose.

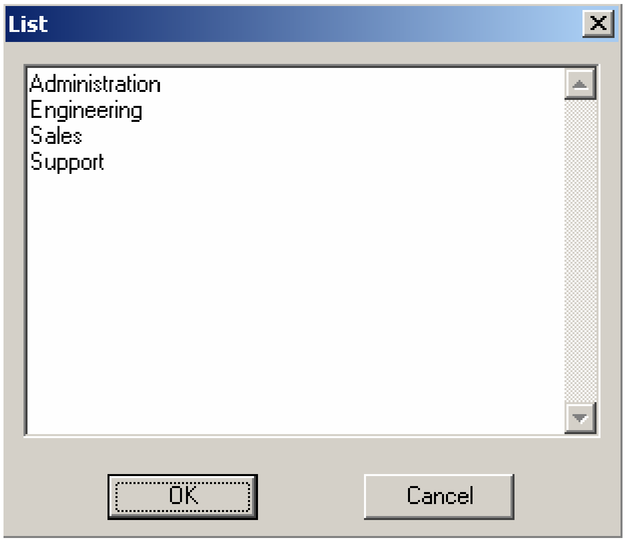
When you select '**Label**' from the drop-down '**Data Type**' menu, a Label Editor dialog box (shown below) will appear, letting you type in the Label's text. When entering this text, please bear in mind that you may use spaces and carriage returns to achieve the formatting of the text that you desire. After you have created the label, pressing the '**Field Settings** ' button on the '**Field Parameters**' properties page will reopen the list values editor.

You may choose from two types of labels – a simple 'plaintext' label, or a more flexible RTF-compliant Rich Text format label.



List Data Type

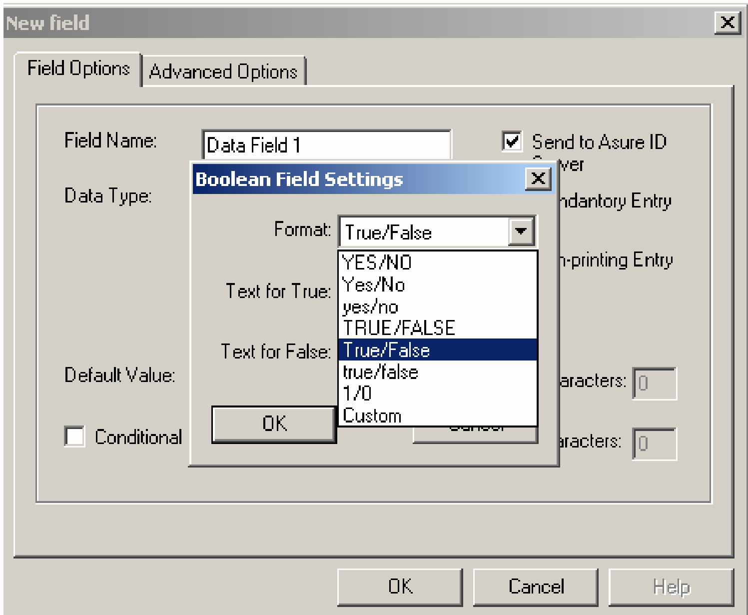
Selecting '**List**' brings up a dialog box that allows you to create a drop-down list of pre-defined values available to fill in the field (see illustration below). When the '**List**' data type is chosen, all entries created for the list will be available in Data Entry Center under a drop-down menu for the data field (as opposed to keyboard-based text entry for '**Text**' or '**Date**' data types.



After you have created the list, pressing the '**Field Options**' button will bring back up the '**List**' properties page that lets you configure the items on the list. When working with the '**List**' configuration menu, you can add items to the list simply by clicking in the list dialog box, and typing the text you want. You can use the <**Enter**> key on your keyboard to enter an item on the following line, and the text from each line will comprise each item on the drop-down list.

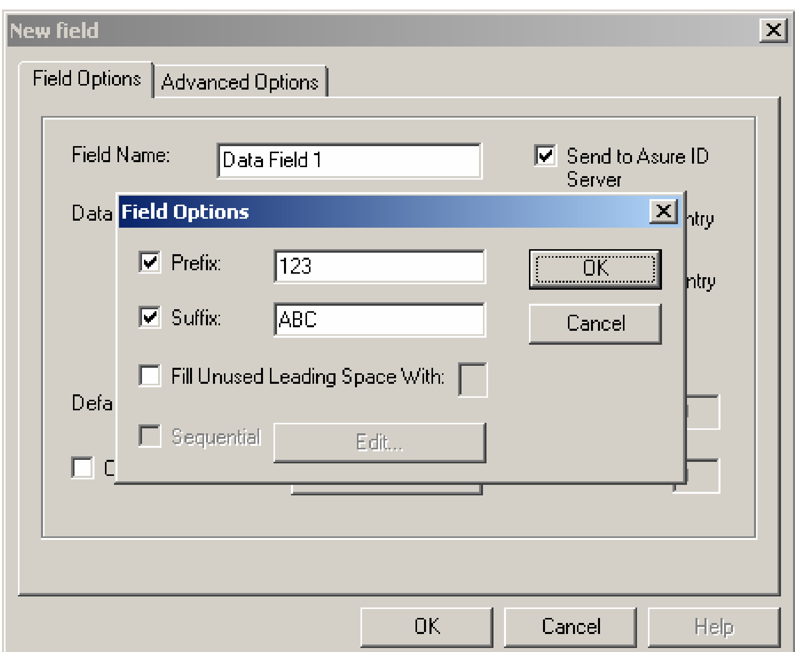
True/False Data Type

Selecting the '**True/False**' data type will present a pop-up menu allowing the user to define custom text for a Boolean (true/false) data field type.



Field Formatting Options

This button is used to configure special formatting for the appearance of a data field, which will be consistent for all cardholders. An example is if an employee number will always begin with a fixed ‘Site Code’, it can be configured as a field **Prefix**, and thus not need to be entered for each cardholder.



On this dialog, the following items can be configured:

Prefix - This item, when checked, allows for a fixed string of text to be used as a prefix before the data entered into your field. This string needs to be entered in the line beside this check box, and will appear exactly as it is entered before the data in the selected field, for each card created in Data Entry Center.

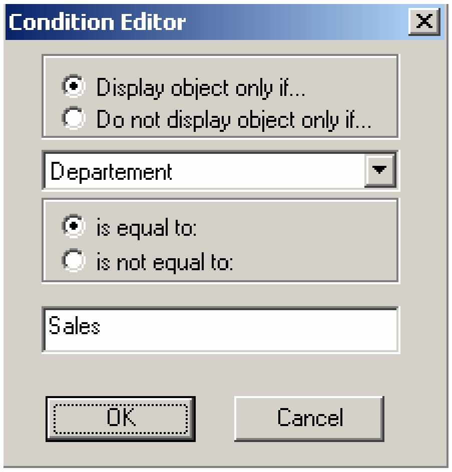
Suffix - Identical to the '**Prefix**' item discussed above, but '**Suffix**' will append the fixed string after the field's variable data.

Fill Unused Leading Space With: - this option gives you the ability to have the field's value always use the maximum number of characters set for the field. When you check this box you can specify a character (such as a zero) that will 'fill' the field up to the beginning of the cardholder's variable data, so that the entries will be the same length for all cardholders.

Sequential - This item, when pressed will bring up a sequential field properties dialog, identical to the one used for Global Counter number fields (discussed earlier). One fundamental difference is that text may be used in addition to numbers, and in fact this text will automatically increment! If you set the initial value to '**A**', and the incremental value to '**2**', your first card will used the letter '**A**', the second card the letter '**C**', the third card the letter '**E**', and so on.

Conditional Display

This option is available for almost all items that can be placed on the card template: **data fields**, **photographs**, **signatures**, **logos**, **backgrounds** and **barcodes**. Using conditional display creates a rule so that the item will only be displayed on the card if certain criterion is met. When you select this item, you will be presented with a dialog box (shown below) that can be used to configure the conditional display.



When configuring the conditional display, there are four items that can be adjusted:
The first determines if the object '**will**' or '**will not**' be displayed if the condition is met. The following three items define the condition itself. Next, choose from the drop-down menu what field (from the available fields on the template) will supply the condition being met, and then choose if the value from this field should be '**equal**' or '**not equal**' to your target value. Finally, type the target value into the final field and hit '**OK**'. After you have defined the conditional display, press the '**Edit**' button on the Field Parameters dialog box for the item, to make any changes.

The '**Conditional Display**' feature can be very useful in a number of different situations. As a good example of how to apply this functionality, let's examine how we can use '**Conditional Display**' to show a different logo depending on what department a cardholder belongs to.

Let’s assume we have a card template that has a '**list**' data field entitled '**Department**'. The list values specify different departments within a company, i.e. Admin, R&D, Finance, and Marketing etc. Next let’s assume that we have a different logo image for each department, an image of a book for admin, a calculator logo for finance, an image of a TV for marketing. The challenge is to create a single card template that will display the correct corresponding logo for each department. Here's how we can use Conditional Display to provide the functionality:

First, add a '**logo**' field, and browse to the book logo that will be used for the admin employees. Drag the logo to the correct location on the card, and then open its properties and check the '**Conditional Display**' box.

In the configuration dialog that appears (shown above), select the '**Display Object Only If...**' button, and choose '**Department**' from the drop-down menu.

Next make sure that the '**is equal to**' radio button is selected, and then type '**Admin**' into the final field.

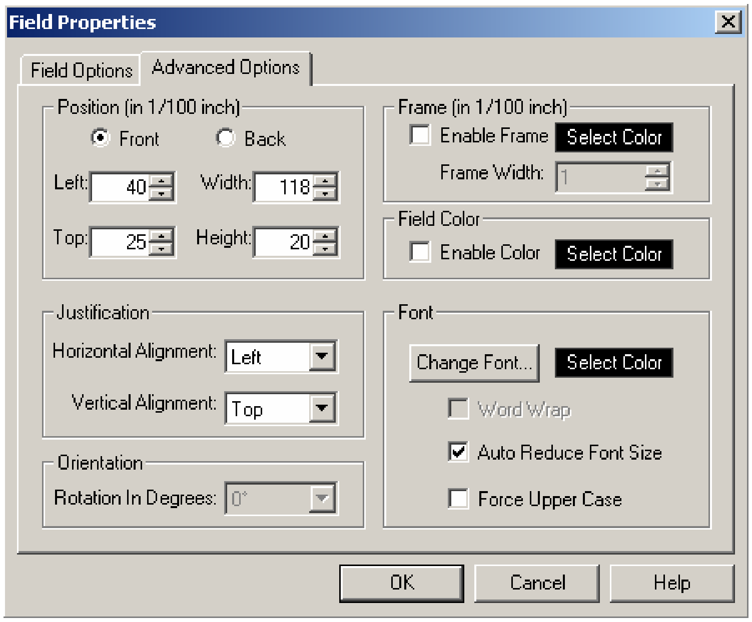
You have now created a logo that will only appear for '**Admin**’ employees.

To create the additional conditional logos, repeat the same steps above, dragging each successive logo on top of (in the exact same location as) the original logo. Create the appropriate conditional display settings, and you now have a card that will display a different logo depending on the department of the cardholder.

When creating conditional display items, it is always a good idea to add an item (at the bottom of any ‘layered’ stack of objects) that does **not** have a condition associated with it. This will be used so that something will appear even if no condition is met. It’s important to realize that, because there is not a condition associated with this object, the software will always consider it to be drawn on the card. For this reason, you should layer it at the bottom of your layered objects, so that if a condition **IS** met, the conditional item will draw **ABOVE** the 'non-conditional' item, and you will only see your conditional item on the card.

Advanced Field Options

The '**Advanced Options**' tab of a Data Field's properties box is used to configure the appearance of the field on your card. The configurable items are broken into six distinct areas: **Position**, **Justification**, **Orientation**, **Frame**, **Field Color** and **Font**.



Position

Card Side (Front/Back): Select either the front or back of the card. Changing this option is the easiest way to move a logo or signature from one side of the card to the other.

Left/Top/Width/Height: These items allow you to fine-tune the position of fields within your template. Manually setting these values allows for much more precise lining up of fields compared to simply dragging them into position. For example, to vertically line up (left-justify) two data fields, make sure that the '**Left**' screen parameter value is the same for both.

Justification

Horizontal Alignment - Configuring this item allows for the control over how your field's text is horizontally aligned within its own allotted space (the 'frame' around the field. The options are '**Left**' (left justify), '**Center**' (centered within its frame) and '**Right**' (right justified). If you would like your text to be centered horizontally on the card, the easiest way to do it would be to stretch the field to the entire width of the card, and then choose the '**Center**' option for '**Horizontal Alignment**'.

Vertical Alignment - Configuring this item allows for the control over how your field's text is vertically aligned within its own allotted space (the '**frame**' around the field. The options are '**Top**' (top justification), '**Center**' (centered within its frame) and '**Bottom**' (bottom justification). If you would like your text to be centered vertically on the card, the easiest way to do it would be to stretch the field to the entire height of the card, and then choose the '**Center**' option for '**Vertical Alignment**'.

Orientation

Rotation in Degrees - This option provides control for the '**Rotation**' of your data field. By default, all data fields are, as you have seen, laid out horizontally on the card. This item allows for the rotation of the field to be set in degrees by choosing a setting from the drop down menu. The options are given in five-degree increments, from 5 to 355 degrees. A setting of 90 or 270 will make the field completely vertical, either up-to-down or down-to-up. Please note that when using this item, the degree measurements will rotate the data field counter-clockwise.

Frame

Enable Frame: Place a check in this box if you would like a frame drawn around the selected field. Please note that the default thin black frame that is apparent on all data fields (before you choose '**Enable Frame**') is not actually a '**drawn frame**' (one that is shown when cards are printed), but rather used simply to show the card designer how much space on the card template area is being used by the field. This can easily be verified by performing a print preview on your card template. Clearing the '**Enable Frame**' item is also handy for when you want to disable a frame without losing your color and line width settings. After enabling a frame, you can select the color of the frame by clicking on the '**Select Color**' button, and the width of the frame (in 0.11mm increments) can be configured with the '**Frame Width**' item.

Field Color

Enable Color - Selecting this item allows for a background '**fill**' color to be used for your data field. Please note that data fields by default have transparency, or no fill color, thus allowing the card's background image to show through behind the data field's text. Using this item will draw the selected color into the field's background. After enabling this item, the fill color can be selected by clicking on the '**Select Color**' button.

Font

The items found in this section of the 'Advanced Options' tab allow for flexible control over the appearance of text within your data field.

Change Font - Clicking on this item will bring up a font selection window, which will allow the user to select the font they would like to use for the text in the data field from any TrueType font installed on the system. This window will also allow for the user to select a font script and size for their field. Please note that Asure ID only supports TrueType fonts, and not the Type II ATM fonts.

Select Color - Pressing this button will bring up the Windows color palette, allowing the user to select the color that they would like to use for the text in this data field.

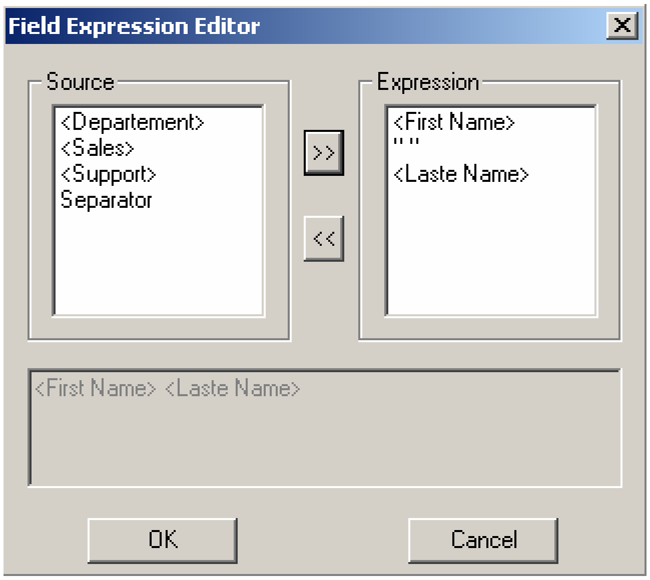
Word Wrap - selecting this item will cause the data contained within the field to occupy multiple lines if needed, or if the width of the field is manually decreased.

Auto Reduce Font Size - Checking this box will automatically adjust the font size as the field itself is resized. This will ensure that the text always fits within the field's parameters, regardless of the screen parameters. The default setting for this option is '**disabled**', which means that the field's width must be manually configured to allow enough space within the field for the selected text.

Force Upper Case - Choosing this option will force the text entered into this field to always be saved in the database and printed on produced cards in uppercase, regardless of the case that the data was entered into. This option will have no use at all for fields that use the 'Number' data type.

Building Expressions from Data Fields

The '**Concatenate**' option allows you to merge multiple existing data fields into a single, new field (often referred to as an '**Expression**'). Before you can choose this item, you need to have at least two data fields already set on your card. When you use the '**Concatenate**' function, you can create a new field out of the two existing ones, and although the fields will remain separated in the database (and thus provide for separate data entry, reporting, querying, import and export operations), they will always be displayed on the card as a single item, with proper formatting maintained. To concatenate two fields, simply right-click on one of them, and select “**Concatenate With….**”. A dialog box (shown below) will appear, allowing you to configure the new field.



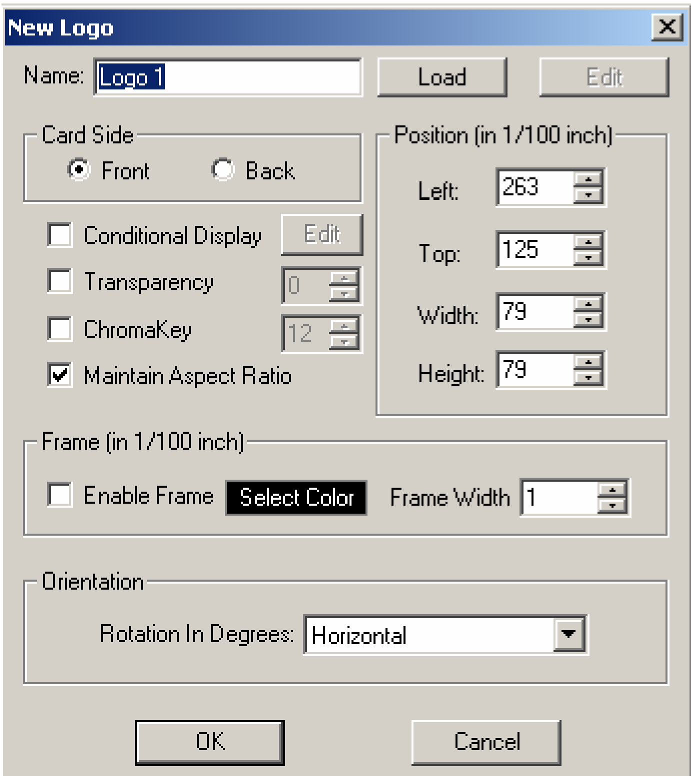
Building expressions can be very useful for a variety of applications. A common usage is to merge the '**First Name**' and '**Last Name**' fields so that the cardholder's names will print along the same line, without the need to manually adjust field spacing. To accomplish this using the expression editor, add the fields you want from the '**Source**' column on the left. This column contains all the data fields that are currently on the card template. Between each field that is added to the expression, it is usually a good idea to add a '**Field Separator**'. This will generally be simply a space, but any text can be used. After selecting Field Separator you will be presented with a dialog box that allows you to enter the desired text for the separator.

As you build the expression, you will see a preview of what it will look like at the bottom of the dialog box. After you are satisfied with the configuration of the expression, press the '**OK**' button. You will see that the fields chosen for use in the expression disappear from the card template (you will see that they re-appear in the 'Non-printed Entries' area), and a single new field, the expression, appears.

It is important to note that although the data is now being written as one field, the Asure ID database still tracks the individual database fields, and the multiple fields will each appear individually in Data Entry Center, and can be still be used normally for import/export activities.
Asure ID has been designed to offer the most flexibility when building data entry fields. Choosing the data type carefully can help ensure that less erroneous data will be accidentally entered when card records are being added to your new template in Asure ID's Data Entry Center.

Logo Button

Select this button to place a logo (fixed image) onto your card. After pressing the '**logo**' button, single-click on the card in the area where you would like to place your logo. After you click on the card, the logo's properties dialog box will appear (shown below) - select the '**Load**' button, and then browse to the image you want to use and select '**Open**'.

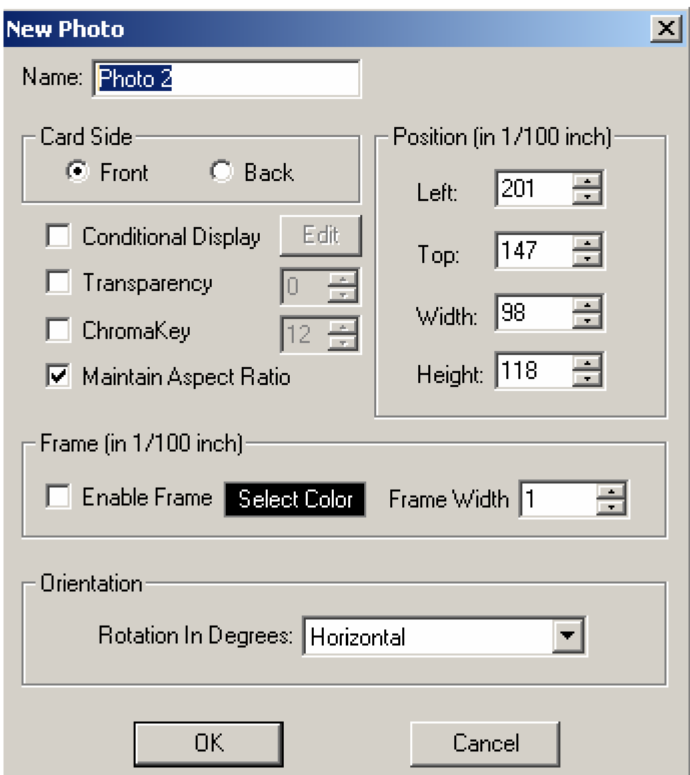


When browsing for an image file, a preview is available to help you choose what file to select. After the image is loaded you may press the '**Edit**' button to crop the selected logo. This cropping feature is identical to that described for card background images. Also on the logo's properties dialog you will have the option to control 'Conditional Display', 'Transparency', 'Keep Aspect Ratio' and 'Chromakey' (discussed above).

Additionally you will find 'Frame', ‘Orientation’ and 'Position' items that function identically to those previously described for Data Fields. After you have chosen the options for your logo, they can be changed at any time by double-clicking on the logo field to reopen the item's options dialog box, or by right-clicking and selecting ‘Properties’.

Photograph Button

Select this button to add a field to the template that will contain the cardholder's photograph. After selecting the '**Photograph**' button, single-click on the area of your card where you would like the photograph to appear. Like logos and data fields, the photograph field can be resized or repositioned by dragging it around the template (or by using the arrow keys), and the options dialog box can be opened by either double-clicking on the field, or right-clicking and selecting '**Properties**'. This dialog box is almost identical to the one presented for **Logo** items, and you should by now recognize many of Asure ID's 'common controls' presented on this window.



Multiple photos of different sizes may be placed on the card, up to five per card template, and they can be identified for capture within the Data Entry Center by entering a field identifier into the '**Name**' area of the photograph properties box.

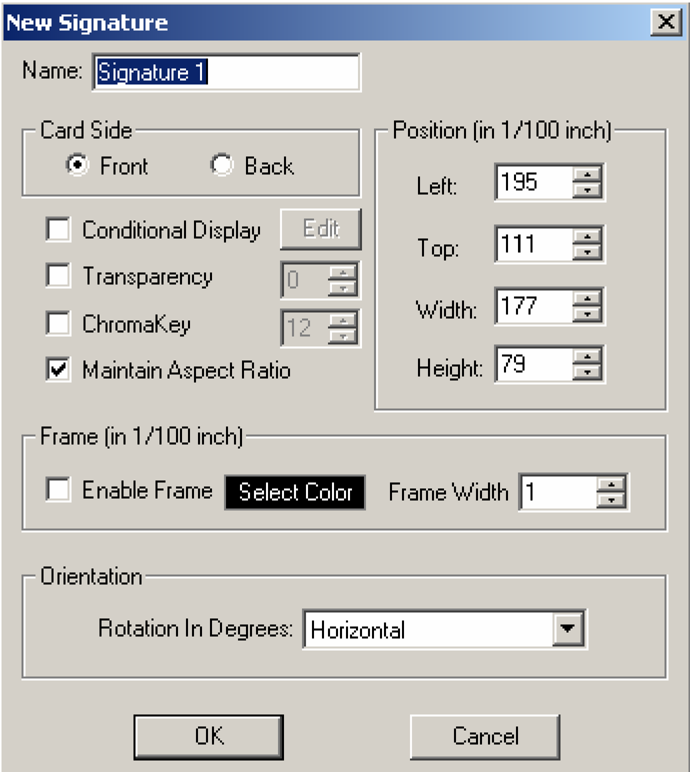
A good example of this would be for a child's daycare card. Many organizations like to have the child's photo on the front of the ID card, and a smaller photo of each person who is authorized to pick up the child on the back. In this case, it would make good sense to use '**Child**' or '**Main**' for the '**Name**' of the first photo field, placed on the front of the card, and a '**Name**' such as '**Father**', '**Mother**', '**Guardian1**', or '**Guardian2**' for the subsequent (most likely smaller) photo fields placed on the back. The value entered for '**Name**' will be the text used as a prompt when capturing multiple photos in the Data Entry Center.

Signature Button

Selecting this button allows you to place a field on the card template that will contain the cardholders' signature.

You will need some form of signature capture hardware (Asure ID supports the Penware® 1100 and 1400 Pad, as well as any pad supporting either the TWAIN or the WinTab Interface) to enter the signature in Asure ID's Data Entry Center, or you can load signatures from a file on your computer.

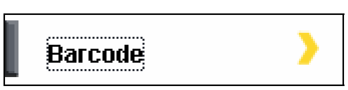
After selecting the '**Signature**' button, click on the card in the area where you want the signature to appear. Signature fields can be repositioned or resized by dragging them while holding the mouse button down (or by using the arrow keys on the keyboard, <**SHIFT**>+arrow keys to resize), and their options dialog box can be opened by double-clicking on the signature field or right-clicking and selecting '**Properties**'.



Note that this dialog box is identical in features and layout to the Photograph dialog box.

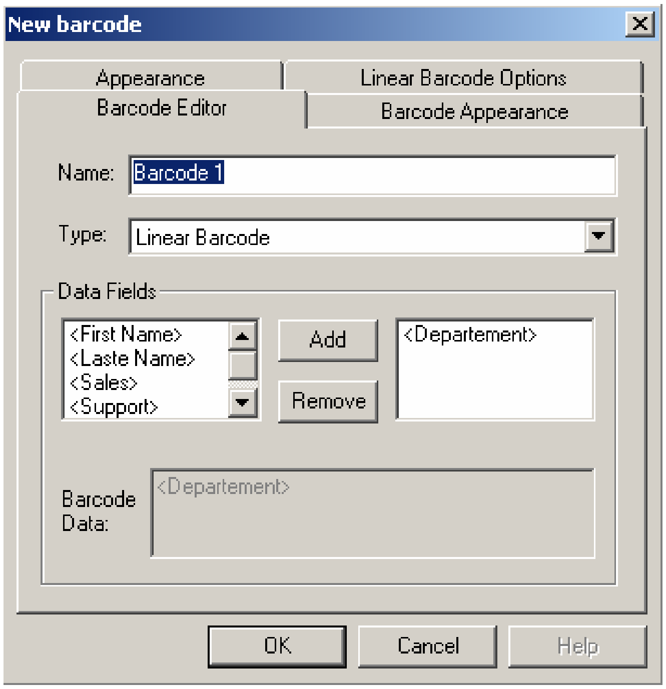
When working with the signature field, it is useful to note that up to **five** unique signatures can be placed on the card, and each can be assigned a different '**Name**'. This is similar to the support for multiple photographs as described above. Your signature fields can be resized to any size or proportion that you would like, and since they support image capture from any **PenWare**, **WinTab** or **TWAIN** compatible device (in addition to loading images from file), this field is ideal to use if you would also like to capture fingerprints, retinal scans, etc. for your cardholders.

Barcode Button



Select this button to add a barcode to your card template. Asure ID gives you the option of encoding the information from any of your data fields (either printed or non-printed entries) into a barcode, so make sure that you have already created the data field(s) you want to encode before you select the '**Barcode**' option.

After pressing the '**Barcode**' button, click on the card to specify where you would like your barcode to appear. A '**Barcode Editor**' dialog box will appear with various options for your barcode.



This window is divided into four sections: '**Barcode Editor**', '**Barcode Appearance**', '**Appearance**' and '**Linear Barcode Options**'.

Barcode Editor Tab

The following items are available on the '**Barcode Editor**' tab of the barcode's properties window:

Name - Enter the name that you would like to use to identify your barcode here.

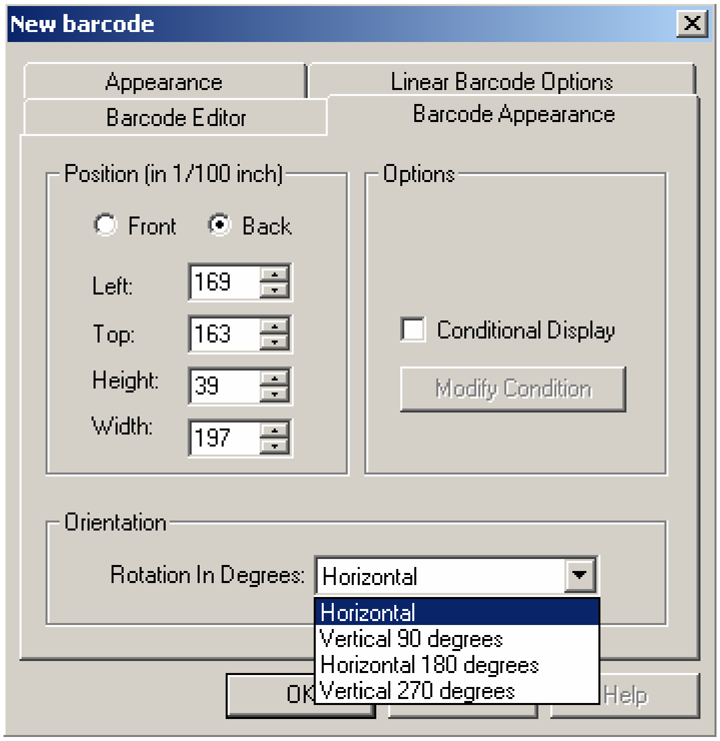
Type - Choose the type of barcode that you would like to create from the drop-down menu. The options are 'Linear Barcode', 'PDF417 (2D) Barcode' and 'Datastrip Barcode'. More detailed information on different barcode styles (or '**symbologies**') and their various considerations and limitations can be found in Appendix 'C' - Barcode Limitations and Considerations.

Data Fields/Barcode Data - After you have chosen the type of barcode you want to create, you must choose what fields will supply the data to be encoded. On the left hand side you will see all of the data fields that are currently on your card template. To add a field to the barcode, double-click on the field in the left column (or select it and then press the '**Add**' button). You will see a copy of the field appear in the right hand column, which is used to list the fields selected for, and the ordering of, the data in the barcode.

It is important to understand that if you add the '**First Name**' data field to the barcode, the words '**First Name**' will not appear in the barcode, but rather the **value** of the '**First Name**' field (entered in Data Entry Center) is what will be encoded, hence the need for a test string (described below) when previewing barcodes in Card Design Center.

Fields that have already been added to the barcode may be removed by selecting them on the right-hand column, and then pressing the 'Remove' button. Please note that this will only remove the field from the barcode's structure, not from your template design. As you build your barcode by adding fields, you will see a preview of the data's structure in the bottom preview pane of the properties page.

Barcode Appearance Tab



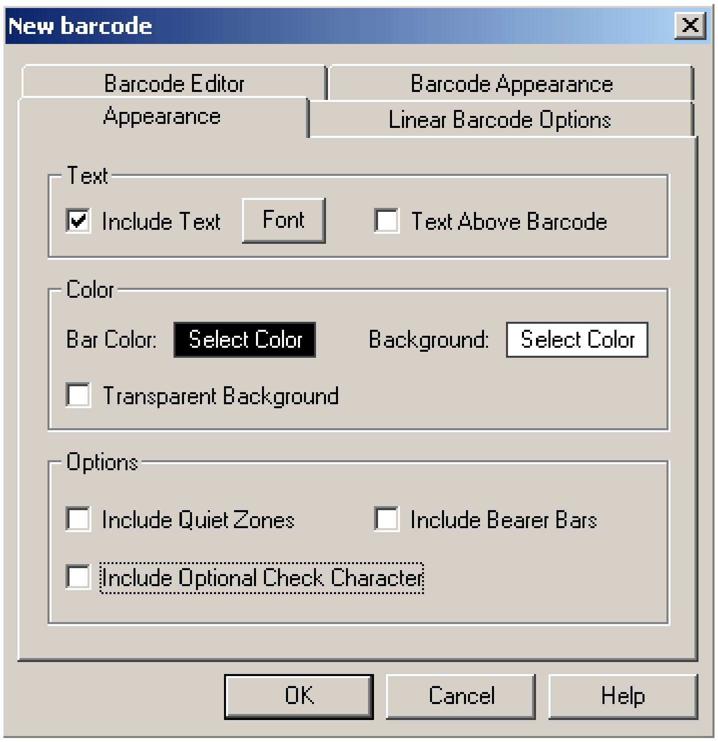
The following items are available on the '**Barcode Appearance**' page of the barcode's properties window:

Position - These items are identical to the '**Position**' controls found on data fields, and allow for adjustment of the position and size of the barcode on your card.

Options - This area allows for the configuration of Conditional Display (as described above under Data Fields).

Orientation - This allows you to specify the degrees of rotation for your barcode, and is identical to the Orientation option discussed above for Data Fields.

Appearance Tab



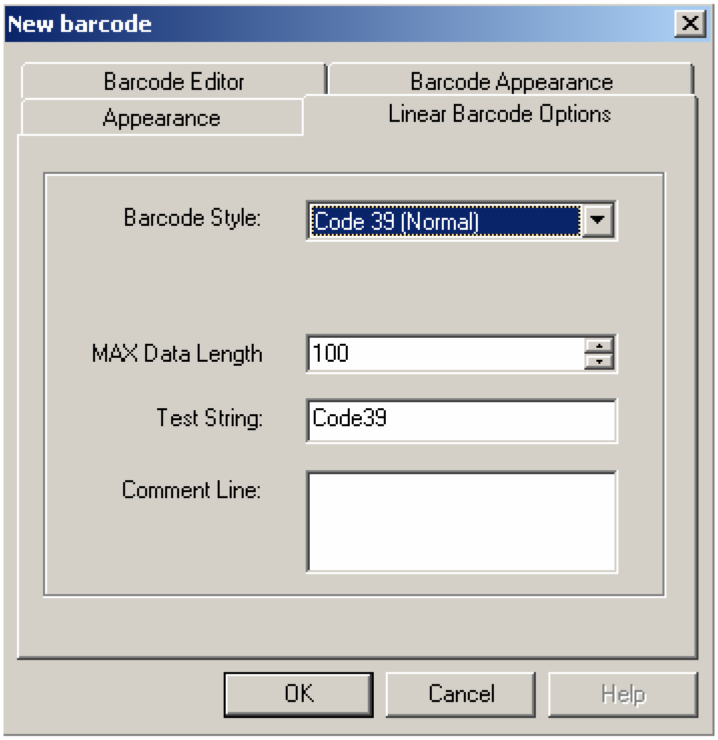
Text - This area provides three controls, '**Include Text**', '**Text Above Barcode**' and '**Font**'. When '**Include Text**' is selected, the data that is encoded to the barcode is printed in 'human readable' form directly below the barcode. The '**Text Above Barcode**' function provides the same functionality, but not surprisingly, forces the text to be printed directly above the barcode, rather than below it. If either of these options has been selected, the '**Font**' button will become available, and may be used to select the font and font options that this human readable text will use.

Color - This area provides three controls that determine the colors used in the barcode. By default barcodes are printed with black bars over a white background, but like most aspects of Asure ID this is completely customizable. Pressing the '**Select Color**' option next to '**Bar Color**' will allow you to configure the color that will be used for the bar, and pressing the '**Select Color**' option next to '**Background**' will let you configure that color that is used behind the bars.

The '**Transparent Background**' check box will override the '**Background**' color selection, and will force any items on the card design to 'show through' between the bars of your barcode. Please exercise caution when using the '**Transparent Background**' item, as cards with a 'noisy' background image on them could interfere with the proper readability of your barcode.

Options - Selecting '**Include Quiet Zones**' will create a barcode with a 'quiet zone', or an area around the barcode that is intentionally left blank to ensure readability. The '**Include Bearer Bars**' item adds bearer bars to both ends of the barcode. This can help differentiate the beginning and the end of the barcode, and is required by certain (usually older) barcode readers. '**Include Optional Check Character**' will, when selected, add a check digit to the barcode. This is use to verify data integrity, and is required by certain barcode readers.

Linear Barcode Options Tab



The items on this tabbed page will only be accessible if Linear Barcode has been selected in the '**Type**' drop-down menu on the Barcode Editor properties page, as none of these items have any functionality when working with **PDF417** (2D) or **Datastrip** barcodes.

Barcode Style - Select the barcode symbology (barcode style) that you would like to use for your barcode. There are many types available, so if you are working with some specific barcode reader or access control system, please check the specification to determine what type of barcode to implement. More information on the various barcode symbologies and considerations is available in Appendix 'C' - Barcode Limitations and Considerations.

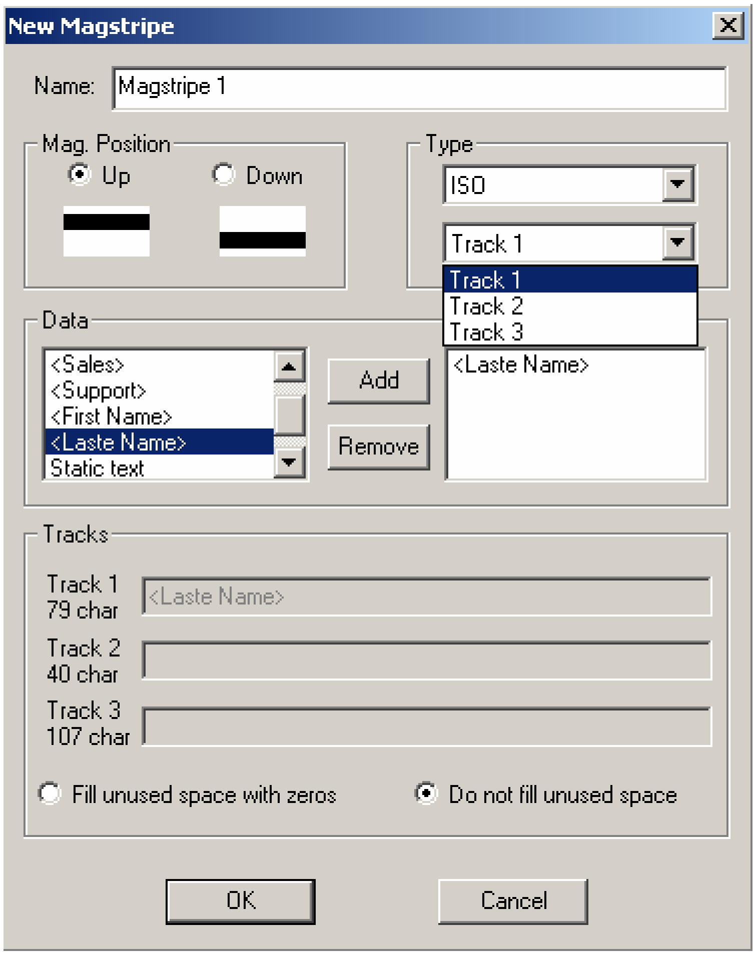
Max Data Length - Specify the maximum number of characters the barcode will be able to use. Note that the higher you increase this number, the wider the barcode will be. It is possible to create a barcode that is too wide to fit on a card template.

Test String - Since the barcode is designed using the available data fields on your template, there will be no data within these fields if you preview the barcode from within Card Design Center. The '**Test String**' allows for the inclusion of any desired characters, simply for the purpose of generating a barcode that can be viewed for layout purposes from within Card Design Center.

Comment Line - At the bottom of the properties menu is a comment line. This area allows the user to type any text in as a '**comment**' that will be displayed in the barcode properties menu. Any text may be placed into this field, with a limit of 100 characters. It is important to realize that this comment is **not** data that will be encoded into the barcode, but rather a string of fixed text that will be displayed alongside the barcode's configuration, possibly as a useful note or reminder to anyone who may be working with your barcode's configuration at some time in the future.

Magstripe Button

Choose this option to add a magnetic stripe to your card. Like a barcode, the magstripe encodes information from your existing data fields. Magstripes have three '**tracks**' that can each contain separate data, so Asure ID allows you to encode information from any of your data fields (either printed or non-printed) into the magstripe. After selecting the Magstripe button, click on the card in the area where you would like the magnetic stripe to appear. An options dialog box will appear asking you to specify the following information:



Name

You can use this area to type a name for your magstripe. By default, '**Magstripe** ' is used here, but it can be changed to any desired name. This is simply a label used to identify the magstripe in the 'Show All Objects' drop-down menu (described in the following section on Card Design Center Drop-Down Menu Items).

Mag. Position

Select the position on the card for the magstripe. Your options are **Up** (top of card) and **Down** (bottom of card) for a landscape card, or **Left** and **Right** for a portrait layout. As the orientation of the magstripe encoder varies from printer to printer, please ensure that your choice matches the capabilities of your encoding hardware.

Type

Choose this option if you would like your magstripe to conform to ISO standards, or if you would like to build a custom magstripe format (non-ISO). Please note that choosing ISO will impose certain requirements when choosing what fields to encode into which track. The magstripe editor will inform you if you are not maintaining ISO compliance with your selections. A third option, entitled '**Custom**' will allow you to input ANY characters into any magstripe track, without checking for compliancy. This has been added for user convenience, however please note that it is possible using this format to create magstripe layouts that will not encode or read back.

Also in the Type box is a drop-down menu that is used to choose which of the three available tracks are currently being edited.

Data Source

Here you will see the data fields from your template that are available for encoding, as well as an item for adding a static text field to each magstripe track.

Adding a static text field prompts you for a unique string of data to encode into the track. The length and data type are useful when building ISO-compliant magstripes. To add a field to the currently selected track, either double-click on the field name or single-click it and press the '**Add**' button.

Any fields that have been added will appear in the right-hand '**Data**' window, and in the track display at the bottom of the magstripe editor window. To remove a previously added field, either double click on it or single-click to select and press the 'Remove' button. Multiple fields can be encoded to a single track, as long as the track stays within the maximum character length as specified in the track display at the bottom of the magstripe editor window (Track 1 - 79 characters, Track 2 - 40 Characters, Track 3 - 107 characters).

Fill/Do Not Fill Unused Space with Zeros

These two options provide a control for how the magstripe encoder should handle unused space in the magstripe. By default, unused space in the magstripe (ex. the maximum of 107 characters for Track 3) will be left empty, but this control allows an option to be selected that will force any unused characters in each magstripe track to be filled with zeros.

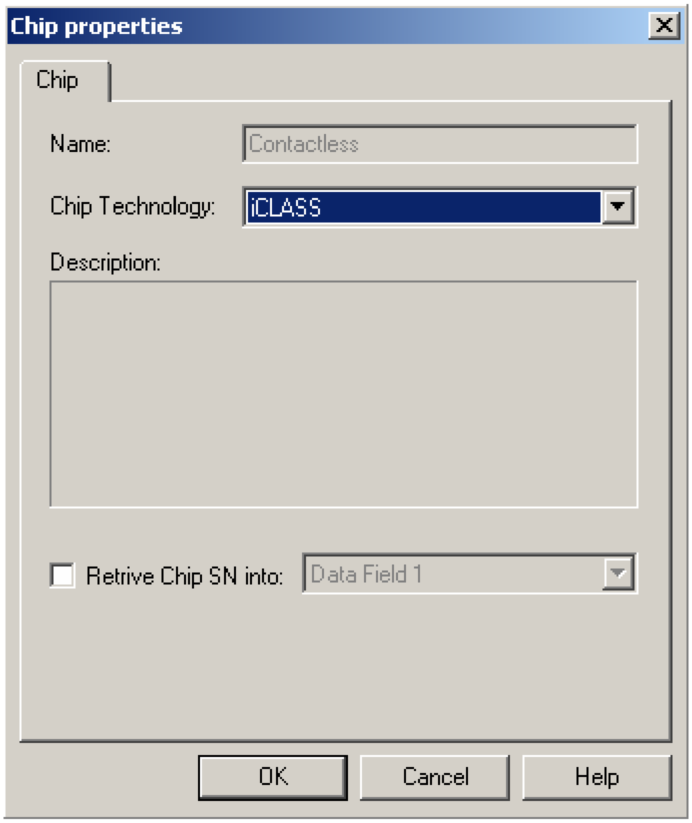
When you have finished making your selections, press the '**OK**' button to add the magstripe to the card. Unlike other fields, magstripes cannot be layered, moved or resized after they have been placed on the card template. The general position or track encoding of the stripe can however be modified by re-opening the magstripe dialog box (by double-clicking on the stripe itself) and editing the various options. This stripe can be removed from your card layout by right-clicking it and choosing the '**Remove**

Magstripe' option. Please note that since they are encoded and not printed, magstripes do not appear in print preview screens. Instead, a code for the data that the stripe holds will be shown.

Chip Button

Asure ID allows the user to read the value stored in certain types of smart cards, and store them in the Asure ID database.

When you add a '**Chip**' to the card layout, the Chip Properties dialog box (shown below) will appear, giving you control over the various chip options.



Chip Technology

Here you will select the type of chip that will be read. All supported chip types are listed on the drop-down menu. Please note that in order to read the chip, there must be a compatible coupler available, either inside your printer, or as a standalone unit connected to the computer. More information on configuring your coupler for use with Asure ID can be found in ‘Advanced Encoding Settings’, in the ‘Drop-down Menu Items’ section of the Data Entry Center Details chapter of this manual.

Retrieve Into:

If you place a check mark beside any of these item, the assigned value such as unique serial number (or 'Chip ID'), card ID or site code of each smart card will be 'read' as the card is encoded, and this number will be added into the current user's record within the Asure ID cardholder database. To select the field from Asure ID's database to save this serial number into, use the drop-down menu. This menu will show all database fields that have been added to the current template, so if you are going to be saving the Chip ID into the database, you will want to create a field to store it first.

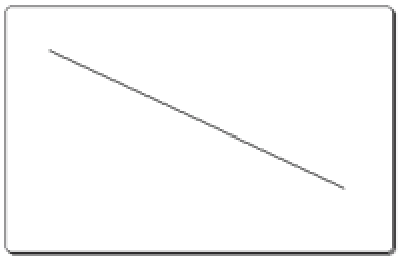
Drawing Tool Buttons

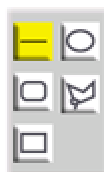
At the bottom right corner of the main Card Design Center screen, you will see a button bar containing five '**drawing tool**' buttons. These buttons are for '**Line**', '**Rectangle**', '**Round Rectangle**', '**Ellipse**' and '**Polygon**'. Using these tools you can draw many different items on your card. To use the tools, simply click the tool you would like, and then click on your card to begin placing the drawing. Depending on the tool you have selected, you will need to place at least one more click on the card to set the second edge of the drawn object.

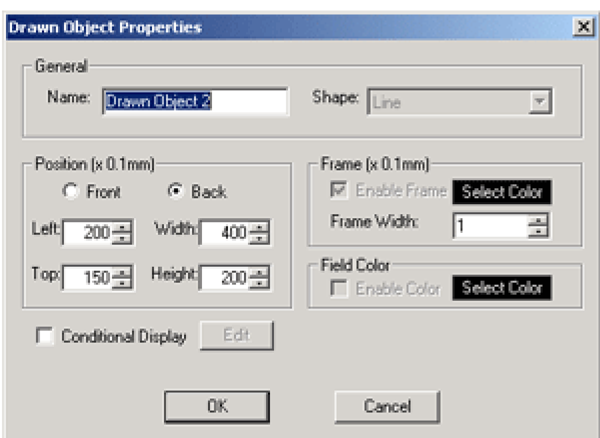
The Polygon tool supports as many '**clicks**' as you would like, allowing the user to draw an object of any imaginable size and shape. After you have placed a drawn object on the card, it can be resized by clicking and dragging the '**handles**' that appear when it is selected. Additionally you may double click (or right click and select properties) on the object to bring up its properties dialog box, which will allow you to configure a '**fill color**', '**frame color**', '**location**' and '**name**' for the object. These drawn objects act like any other item on your card, and can be moved, resized, deleted or opened just like a data field, logo or photo.

Line

Select this item to draw a line on your card. This feature is also accessed by clicking '**Add**' on the drop-down menu bar at the top of the screen, and selecting '**Line**' from the options. The line object is created by clicking on the card where you would like the line to begin, and then clicking again where you would like it to end. After the first click, you will see the line '**following**' your mouse as you move to the second point in the line. After the line has been set, its properties can be opened by double clicking on it (or right clicking and selecting '**Properties**'), and will allow you to control the color, line width and location.

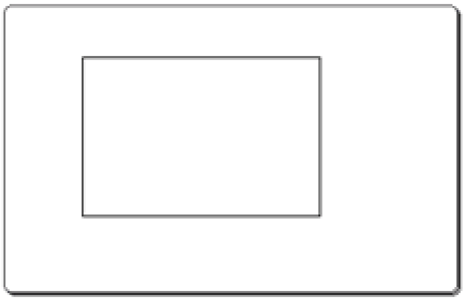


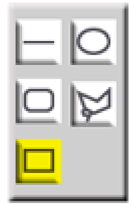


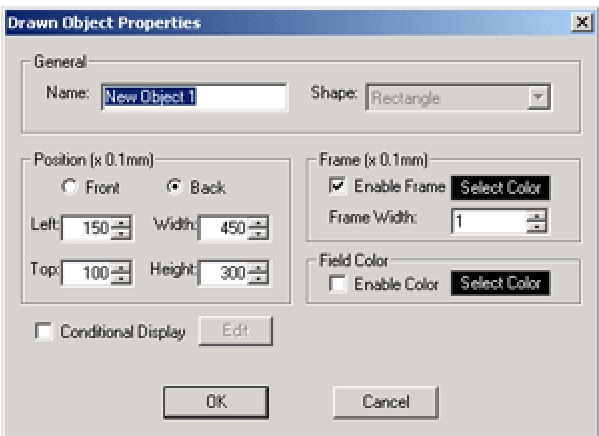


Rectangle

Similar to the Line object, this option allows you to place a rectangle onto the card. This feature is also accessed by clicking the heading '**Add**' from the drop-down menu bar, and then selecting '**Rectangle**' from the options.

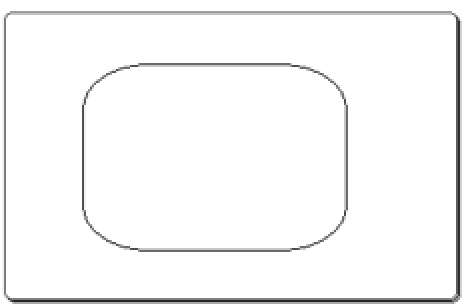


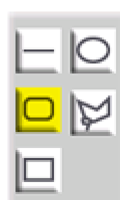


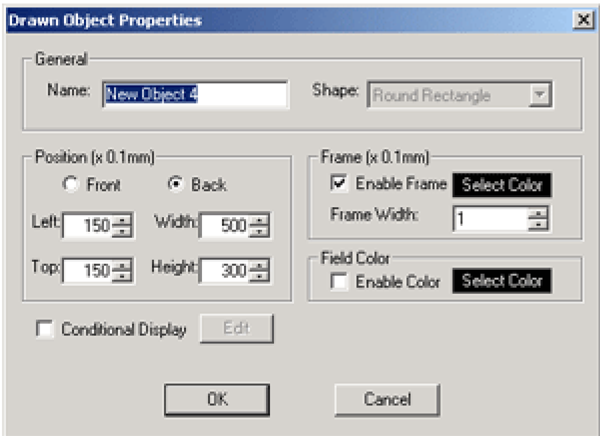


Round Rectangle

Again, similar to the Line object, this allows you to place a rectangle with rounded corners on the card template. This feature is also accessed by clicking the heading 'Add' on the top Drop-Down menu bar, and then selecting '**Round Rectangle**' from the options.

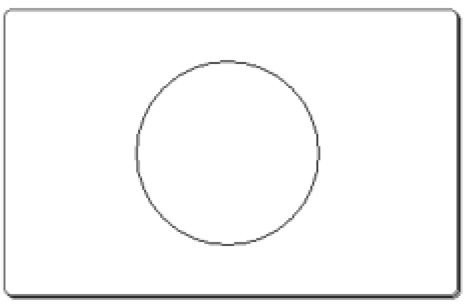


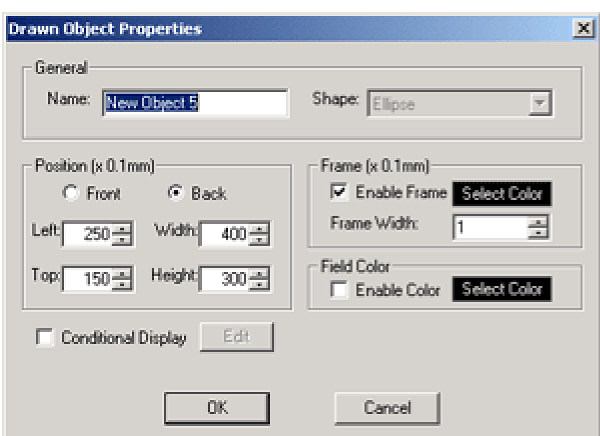




Ellipse

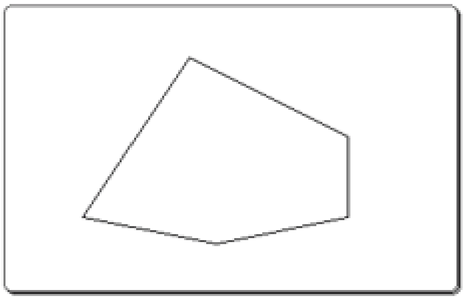
Much like the Rectangle object, this lets you create an ellipse (oval or circle) on the card template. This feature is also accessed by clicking the heading 'Add' on the top Drop-Down menu bar, and then selecting '**Ellipse**' from the options.

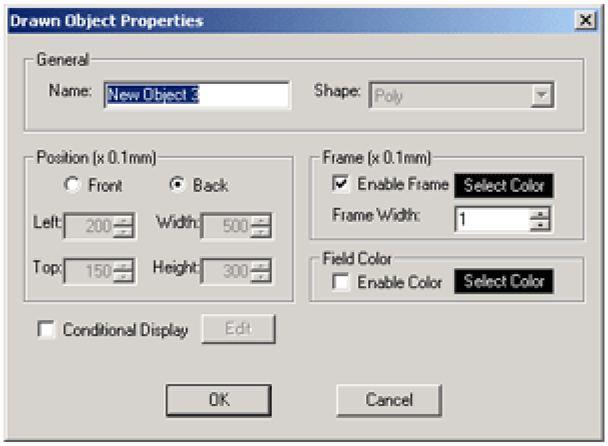




Polygon

Similar in function to the other drawing objects, the Polygon tool lets the user create a flexible, multi-sided polygon object on the card. After setting the first point with a mouse click, additional clicks will create multiple '**anchor points**' for the polygon's corners on your card. After you have designed the object you want, double clicking on the template will let you exit the Polygon tool. After the polygon has been set, its dimensions can be rearranged by dragging any of the '**handles**' (often referred to as vertices or corners) while holding down the mouse button. This feature is also accessed by clicking the heading 'Add' on the top Drop-Down menu bar, and then selecting '**Polygon**' from the options.





Card Design Center Navigation Buttons

Data Entry Center: Press this button to quickly go from the Card Design Center to the Data Entry Center. Please note that you must have Data Entry Center privileges assigned to your user profile for this to work.

Admin Center: Use this button to quickly go from the Card Design Center to the Admin Center. Please note that you must have Admin Center privileges assigned to your user profile for this to work. For more information on permissions, please see 'Asure ID Users and Privileges'.

Help: Select this button to jump to Asure ID's online help file.

Card Design Center Drop-Down Menu Items

The following items are found at the top of the Card Design Center's interface, under the headings **Template**, **Print**, **Edit**, **Add**, **View**, **Settings** and **Help**.

Template

New Card Template - Select this item to begin working on a new card template. This is the same as pressing the '**New**' button on the main Card Design Center window.

Open Card Template - Select this item to open a previously saved template. This is identical to pressing the '**Open**' button on the main Card Design Center window.

Save Card Template - Select this item to save the current card template to the database. The template will be saved under the name that was specified under Template Properties when the template was started.

Save Card Template As - Select this to save your current template and specify a filename. This is the same as pressing the '**Save**' button on the main Card Design Center window.

Template Properties - Select this item to review the properties for the current template; card size and template name.

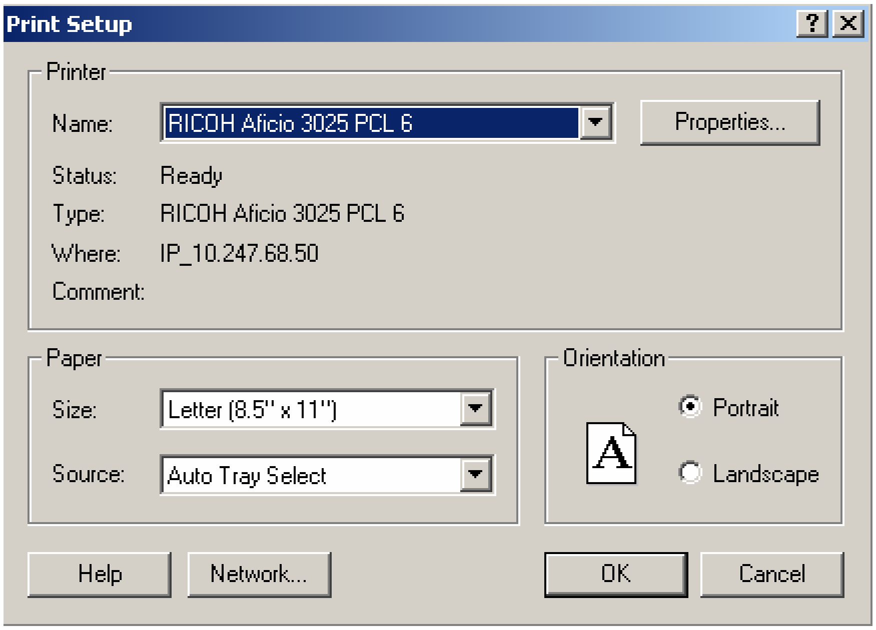
Import Card Template - Select this item to browse for a template file to import into Asure ID's database. The template may be either an Asure ID v4.0 (or higher) template that was exported using the '**Export Template**' function. When you Import a template, it will not be automatically added to the database, so be sure to press the '**Save**' button if you want to store this template in your Asure ID database for later use.

Export Card Template - Select this item to export the currently selected template to a stand-alone file. This is useful if you want to back up the templates that you have created or if you want to move your template to another computer running Asure ID. Please note that exported templates will not work with earlier versions of Asure ID – make sure that anyone you send the template to has updated their software to at least the same version that you are using.

Exit - Choose this item to end your current Card Design Center session.

Print

Set Printer Settings - Select this item to choose from any available printers, and to set various options provided with your printer driver.



Print Preview - Select this item to view a print preview of the current template. You must have a card printer driver installed on your local computer to use this option.

Print... - Choose this item to print the current template on a local printer.

Edit

Undo - Select this item to reverse the last action performed in the Card Design Center. Selecting '**Undo**' again will reverse the action previous to the one just reversed, and so on.

Redo - Select this item to duplicate the last action performed by Card Design Center, or to reverse the effects of an '**Undo**' operation.

Cut - Select this item to '**cut**' the currently selected object on the card's design, and place it on the Windows clipboard. You need to select either '**Cut**' or '**Copy**' if you want to paste an object to a different location. You can also perform a '**Cut**' operation by right clicking on the object you would like to cut, and selecting '**Cut**'.

Copy - Select this item to place a copy of the currently selected object (from the card's design) onto the Windows clipboard. A copy of the object can then be placed on a different location on the card by choosing the '**Paste**' option. You can also perform a '**Copy**' operation by right clicking on the object you would like to cut, and selecting '**Copy**'.

Paste Clone - Select this item after performing a '**Cut**' or '**Copy**' operation to paste the selection from the Windows clipboard to the currently selected area on the card. You can also perform a '**Paste**' operation by right clicking on the object you would like to cut, and selecting '**Paste**'. This will paste a copy of the selected object on the card.

Paste Properties – Selecting this option will paste the properties of the last copied object, onto the currently selected object.

Properties - Select this item to open the properties dialog box for the currently selected object on the card template's design. You can also access the object's properties right clicking on the object, and selecting '**Properties**', or simply by double clicking the object.

Add

Background - Select this item to add an image or a color to the background of your card template. After choosing this item you will be prompted to select which side of the card you want to add the background to. Make your selection, then either browse to an image file to load for the background, or choose a background from the Windows color palette. For more information, see ‘Card Template - (Front and Back)’ earlier in this section. Choosing this drop-down menu item provides the same functionality as double-clicking on the front or back of the card template.

Data Field - Select this item to add a data field to the card template. More information on data fields is available under Data Field. Selecting this item provides identical functionality as pressing the 'Data Field' button on the main Card Design Center window.

Logo - Select this item to add a logo to your card template. More information on Logos is available in the section on Function Buttons. Selecting this item provides identical functionality to pressing the ‘Logo’ button on the main Card Design Center window.

Photo - Select this item to add a photograph field to your card template. For more information see 'Photograph' in the section on Function Buttons. Selecting this item provides the same functionality as clicking on the 'Photograph' button on the main Card Design Center window.

Signature - Select this item to add a signature field to your card template. For more information see 'Signature' in the section on Function Buttons. Selecting this item provides identical functionality to pressing the Signature button on the main Card Design Center window.

Barcode - Select this item to add and set the options for a barcode on your card template. For more information on barcodes see 'Barcodes' in the section on Function Buttons. Choosing this item provides identical functionality as pressing the Barcode button on the main Card Design Center interface.

MagStripe - Select this item to add and set the options for a magstripe on your card template. For more information see 'Magstripe' in the section on Function Buttons. Choosing this item provides identical functionality as pressing the large Magstripe button on the main Card Design Center window.

Chip - Select this item to add and set the options for a smart chip on your card template. For more information see 'Chip' in the section on Function Buttons. Choosing this item provides identical functionality as pressing the large Chip button on the main Card Design Center window.

Line - Select this item to draw a line on your card. This feature may also be accessed by clicking on the ‘Line’ button within the ”Drawing Tools” button bar (at the lower right of the Card Design Center screen). The line object is created by clicking on the card where you would like the line to begin and then drag and release where you would like it to end. After the first click, you will see the line 'following' your mouse as you move to the second point in the line. After the line has been set, its properties can be opened by double clicking on it (or right clicking and selecting 'Properties'), and will allow you to control the color, line width and location.

Rectangle - Similar to the '**Line**' object discussed above, this option allows you to place a rectangle onto the card. The Rectangle button on the drawing objects button bar provides the same functionality.

Round Rectangle - Again, similar to the '**Line**' object discussed above, this allows you to place a rectangle with rounded corners on the card template. The Round Rectangle button on the drawing objects button bar provides the same functionality.

Ellipse - Much like the '**Rectangle**' object, this lets you create an ellipse (oval or circle) on the card template. The Ellipse button on the drawing objects button bar provides the same functionality.

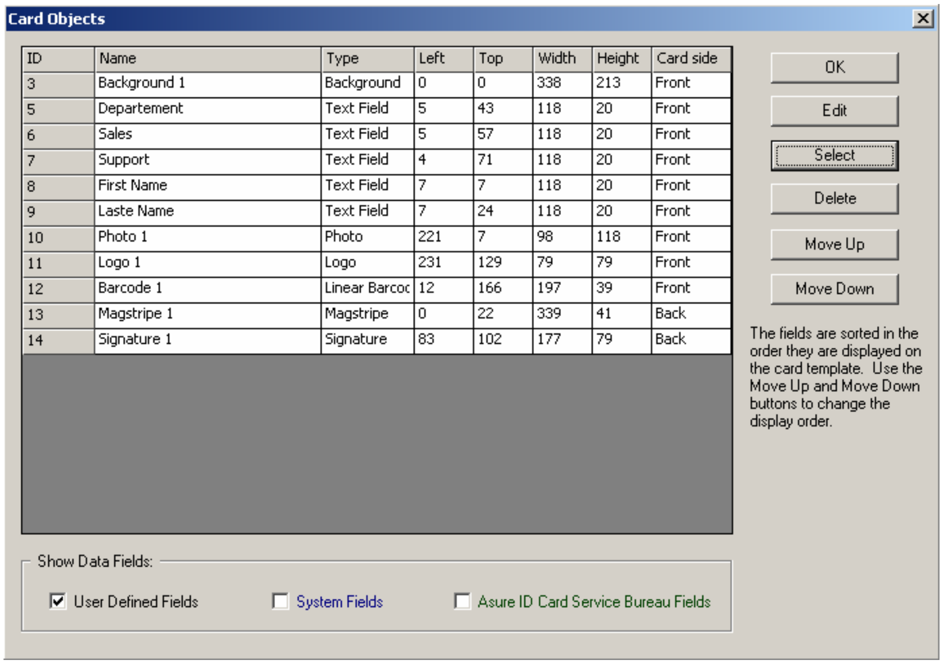
Polygon - Similar in function to the other drawing objects, the Polygon tool lets the user create a flexible, 'multi-sided polygon' object on the card. After setting the first point with a mouse click, additional clicks will create multiple 'anchor points' for the polygon's corners on your card. After you have designed the object you want, holding down while clicking will let you exit the Polygon tool. After the polygon has been set, its dimensions can be rearranged by dragging any of the 'handles' (often referred to as vertices or corners) while holding down the mouse button. The Polygon button on the drawing objects button bar provides the same functionality.

View

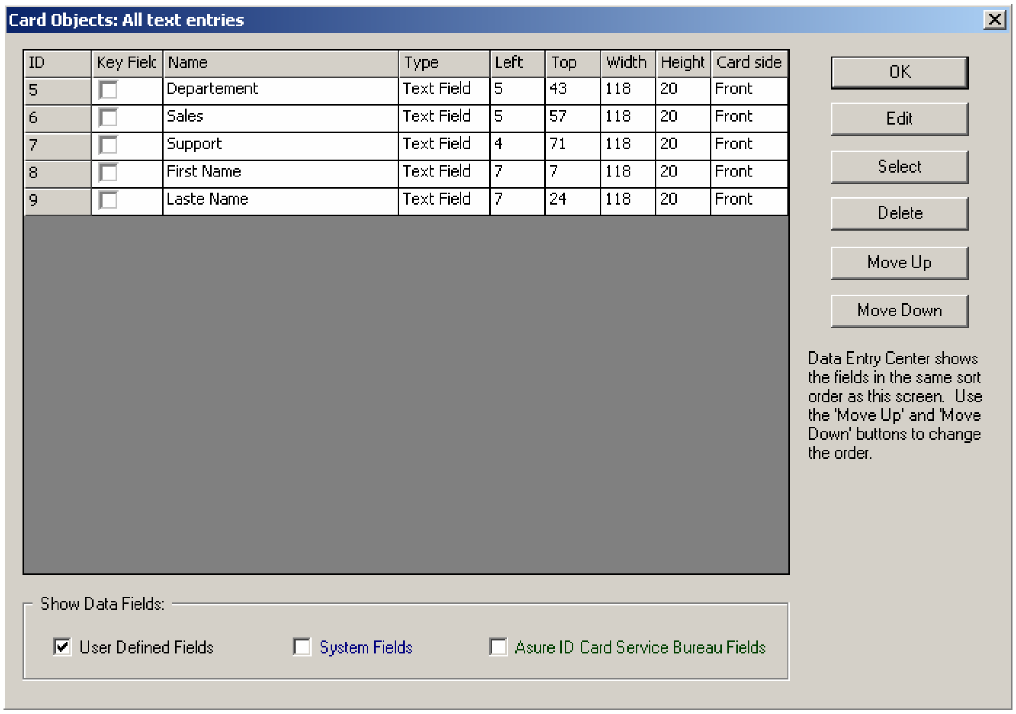
Show Grid - Select this item to toggle on and off the superimposing of a 'grid' on the card template's surface. This grid is provided for use as a visual reference to help line up fields on the card template. It will not show in your card's print preview, nor will it print on the finished card. To remove the grid, simply select this item again to deselect the grid. The amount of space between the points on the grid, as well as the disabling of the 'Snap-to' feature can be adjusted by selecting the 'Grid Settings' option, found under the Settings drop-down menu.

Show Internal Circuit – For cards which have an internal smart chip (contact or contactless) specified in their properties, this item can be used to toggle a ‘view’ of the chip and internal wiring layout. This can be very useful when determining where to leave space on the card design for a hole punch for example.

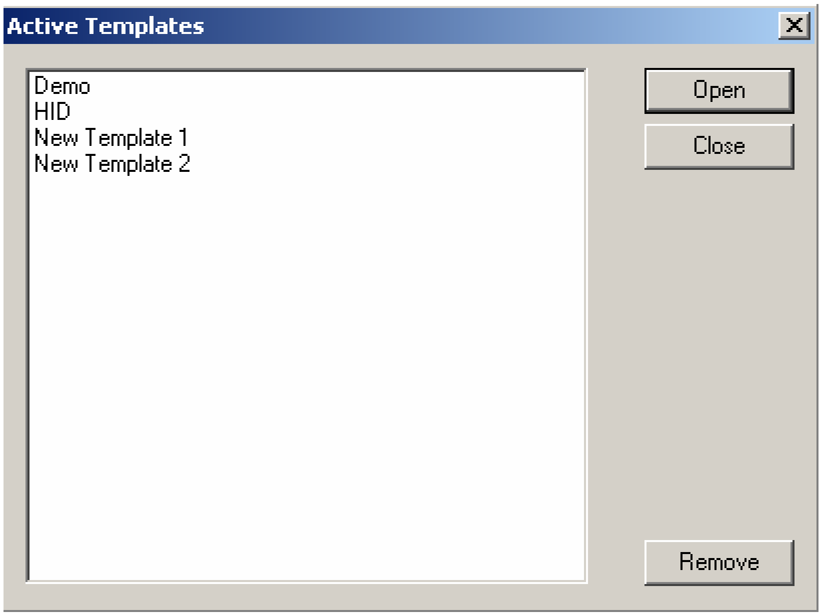
Show All Objects - Choosing this item creates a table style report of all the items (logos, photos, data fields, etc.) on the card template. This can be useful for selecting items 'hidden' underneath layers without having to move the upper-layer items aside. You may select any item in this report and press the ‘Delete’ button to delete it from the card template, or press the ‘Edit’ button to open the item's properties menu, or you may use the supplied controls to adjust the layering of objects on your card.


ID	Name	Type	Left	Top	Width	Height	Card side
3	Background 1	Background	0	0	338	213	Front
5	Departement	Text Field	5	43	118	20	Front
6	Sales	Text Field	5	57	118	20	Front
7	Support	Text Field	4	71	118	20	Front
8	First Name	Text Field	7	7	118	20	Front
9	Laste Name	Text Field	7	24	118	20	Front
10	Photo 1	Photo	221	7	98	118	Front
11	Logo 1	Logo	231	129	79	79	Front
12	Barcode 1	Linear Barcoc	12	166	197	39	Front
13	Magstripe 1	Magstripe	0	22	339	41	Back
14	Signature 1	Signature	83	102	177	79	Back

Show All Data Entries - Choosing this item will bring up a table style report of all the Data Fields on the card. This is a useful aid in the configuration of especially busy card templates. Once selected from the report that appears, the properties of any Data Field can be adjusted by pressing the 'Edit' button. Additionally, selecting a field from this menu, and pressing the ‘Move Up’ or ‘Move Down’ button can control the order that the fields will appear in the Data Entry Center. The uppermost field in this window will be the first field in Data Entry Center, and you may reorder fields at will within this dialog. When you are happy with the field ordering, press the 'OK' button to set your selections and close the menu.



Show All Templates - Selecting this item will bring up a list of all the templates saved in the database. This menu can be used to delete any of the active templates, simply by selecting the template, and pressing the ‘Remove’ button. Please note that deleted templates will no longer be available – you may want to export a copy of the template before you remove it from the database.



Refresh - Select this item to '**refresh**' the template database and the display of the active card template. Use this if another networked user has made changes to the templates that you would like to see.

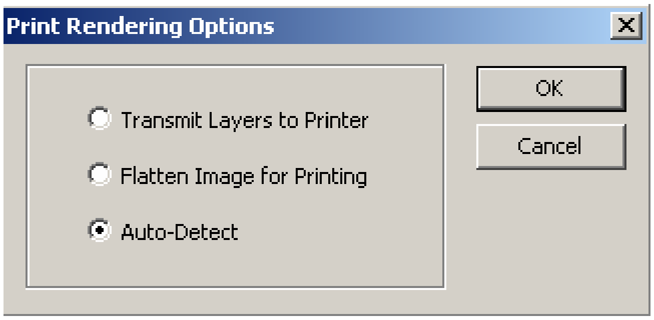
Settings

Rendering Options - "Rendering" is the act of converting all of the layout, imaging and cardholder information that is to be printed on the card into a graphic image that can be sent to the printer. Because different printers 'expect' that the information will be presented to them in different ways, Asure ID has had to place 'rendering options' within the software. These settings are global, and will affect the way in which your card appearance will be translated for printing, print-preview, and onscreen display.

An example of where rendering options are needed is if you are having problems getting K-Panel printing to work with your printer. By default, Asure ID sends all printed information in 'layers', which are passed to the printer for printing. This approach is useful to attain K-Panel printing on printers that 'look for' different objects on the card when setting up K-Panel printing. If your printer driver's K-Panel options include items like "Use only on Barcode", "Use everywhere except color photo" etc., then your printer is expecting the information to arrive in layers, and not as a single image file. In this case, with default Asure ID settings, the K-Panel options in your printer should work.

As a counterpoint however, some printers do not care about 'layers', and treat everything on the card as a whole. In this case, our default 'layer' approach should still work, however some advanced imaging features, such as transparency and ChromaKey, may not work if their command sets are not supported by your printer. By enabling 'pre-rendering' of the card image, these imaging operations are taken care of by Asure ID, rather than by the printer driver. When pre-rendering is enabled, all printed items on the card are ‘flattened’ into a single image file, which is then passed to the printer.

Selecting the ‘Rendering Options’ item from the ‘Settings’ drop-down menu will open a dialog box (shown below) where all of Asure ID’s rendering options can be controlled.

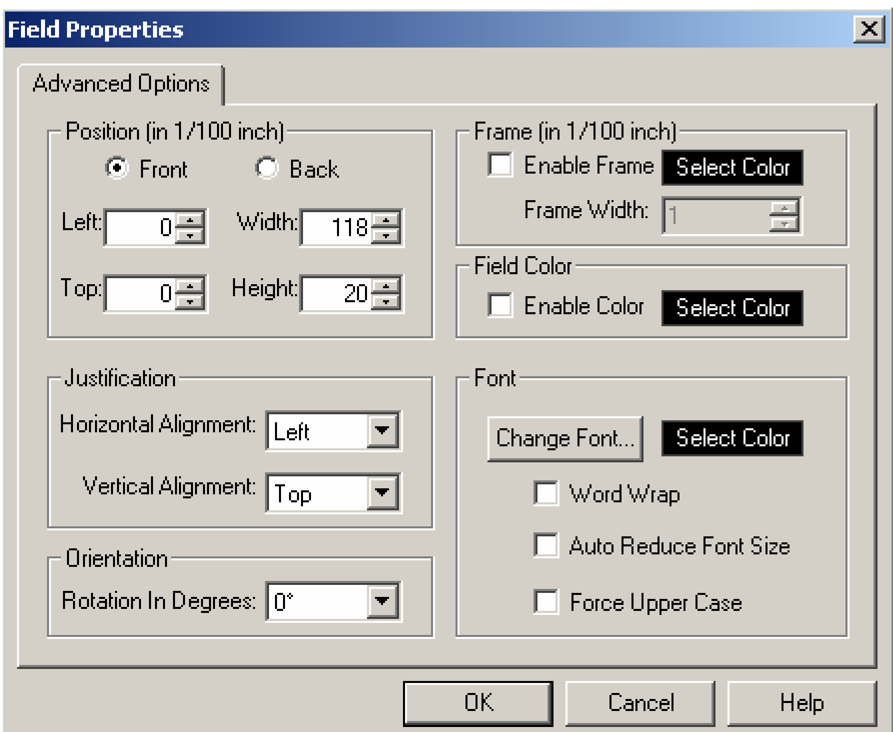


There are three possible rendering options for use with Asure ID:

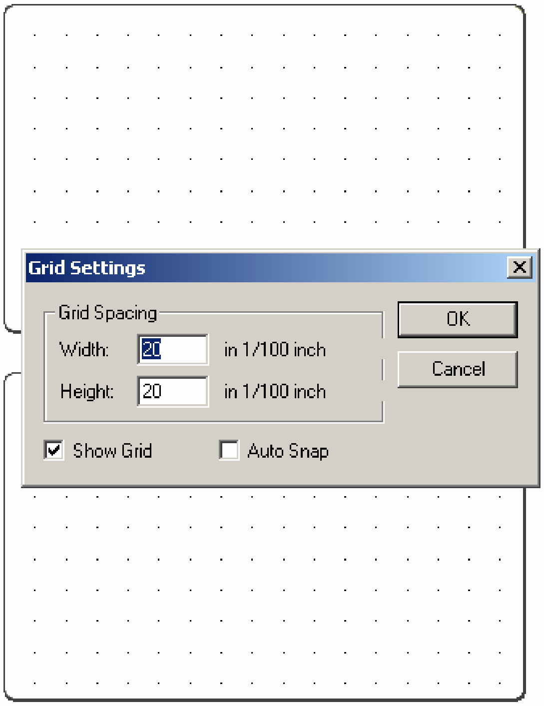
- **Transmit Layers to Printer** – no pre-rendering is performed
- **Flatten Image for Printing** – all card objects are pre-rendered into a ‘flattened’ image. This option is used when a printer has trouble working with Asure ID’s commands for transparency, layering, or ChromaKey.
- **Auto-Detect** – Asure ID will determine when to pre-render, based on the type of objects on your card, and the capabilities of your printer. This is the default setting which should be used for the majority of printing operations.

Name Card Record By… - Within Asure ID’s database, by default records are identified using a hidden ‘RecordID’ system database field, which acts as the ‘Primary Database Key’ inside the database. In some cases, such as the use of Live Link, users may wish to override this indexing convention, and utilize a different field as the record ‘Name’. Selecting this item will bring up a dialog box (shown below) with a single drop-down menu, which contains all data fields from the card design. Users may select any one as the new ‘Name’ key field; however it is extremely important that the selected field contain a unique value for all cardholders. Fields like ‘First Name’ and ‘Department’ would not make acceptable candidates for a new primary key. We recommend that only advanced users who are aware of the implications of changing the Primary Key field make changes to this setting.

Default Field Parameters - Selecting this item allows the user to configure (using the dialog box shown below) default settings for the various font and frame parameters available for data fields, logos, photos and signatures. You will notice that this presents the same options that are found on the 'Advanced' tab of any Data Field on your card, and this menu item can be used to override the program's default settings for these functions. The selected settings will automatically be applied to all new items, although they may be changed at any time as needed. Additionally, these items may be set by configuring the parameters of a new field, pressing 'OK' to set the field on the card, and then right-clicking the field and choosing 'Set As Default'.



Grid Settings - Select this item to define the parameters for the grid using the dialog box that appears (shown below). You can adjust the space between grid markings both vertically and horizontally effectively making the grid seem more or less dense. Two additional items on this window are 'Show Grid' and 'Auto Snap'. Toggling the 'Show Grid' item on and off will alternatively turn the grid on and off (note that the grid is for layout purposes only, and will not be shown on printed cards or in print preview operations). When the 'Auto Snap' item is turned on, objects on the card will 'snap', or jump to the nearest grid point when moved. If you disable this feature, the objects may be moved to any location on the card and will not 'snap'.



Help

Asure ID User's Manual - launches the locally installed copy of this document, the Asure ID User's Manual.

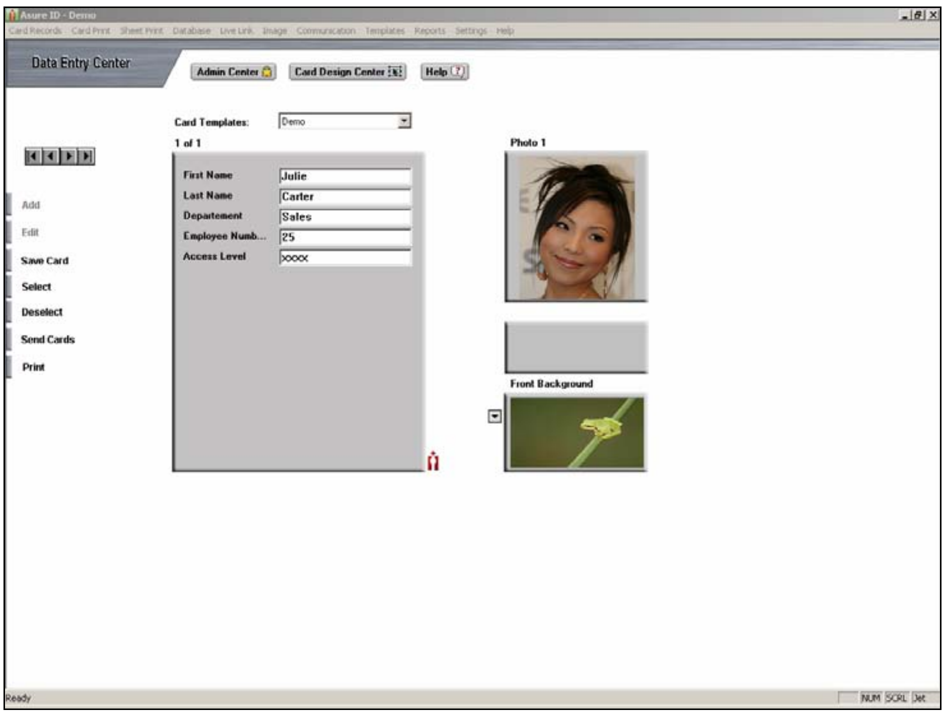
www.AsureID.com - launches your web browser and directs you to Asure ID's webpage.

About - Displays about, copyright and version information for your copy of Asure ID.

Data Entry Center Detail

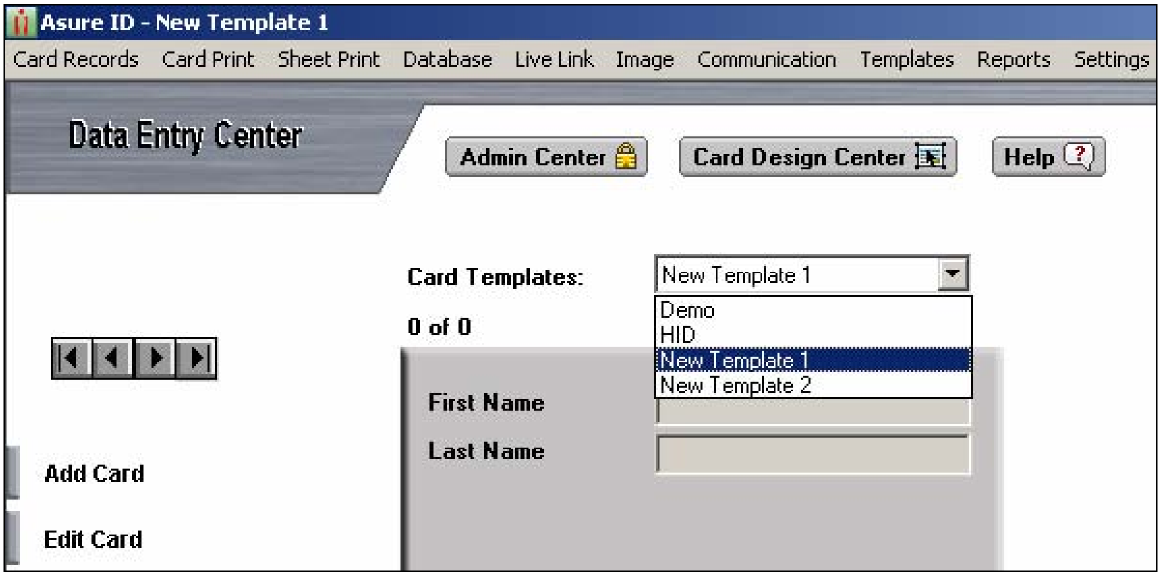
This section is designed to complement the information provided in the Asure ID Quick Start Guide. Please ensure that you begin by reading the Quick Start Guide, and then proceed to this section if you need to find more detailed information. In this section you will find a comprehensive listing of all the options found in Data Entry Center, and their various functions.

Note: There must be at least one saved template (created the “Card Design Center”) in order to open the “Data Entry Center”.

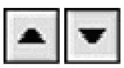


Card Template

Select the template you wish to add cards to from the drop-down menu. When a template is selected, all fields that require data entry will be visible in the center of the Data Entry Center window. These data fields will be grayed out until either the 'Add Card' or 'Edit Card' button is pressed. Depending on the data type (as defined when constructing the template in Card Design Center), information will either be typed in by keyboard ('Text', 'Numerical', and 'Date' fields) or selected from a drop-down menu ('True/False' and 'Lists').



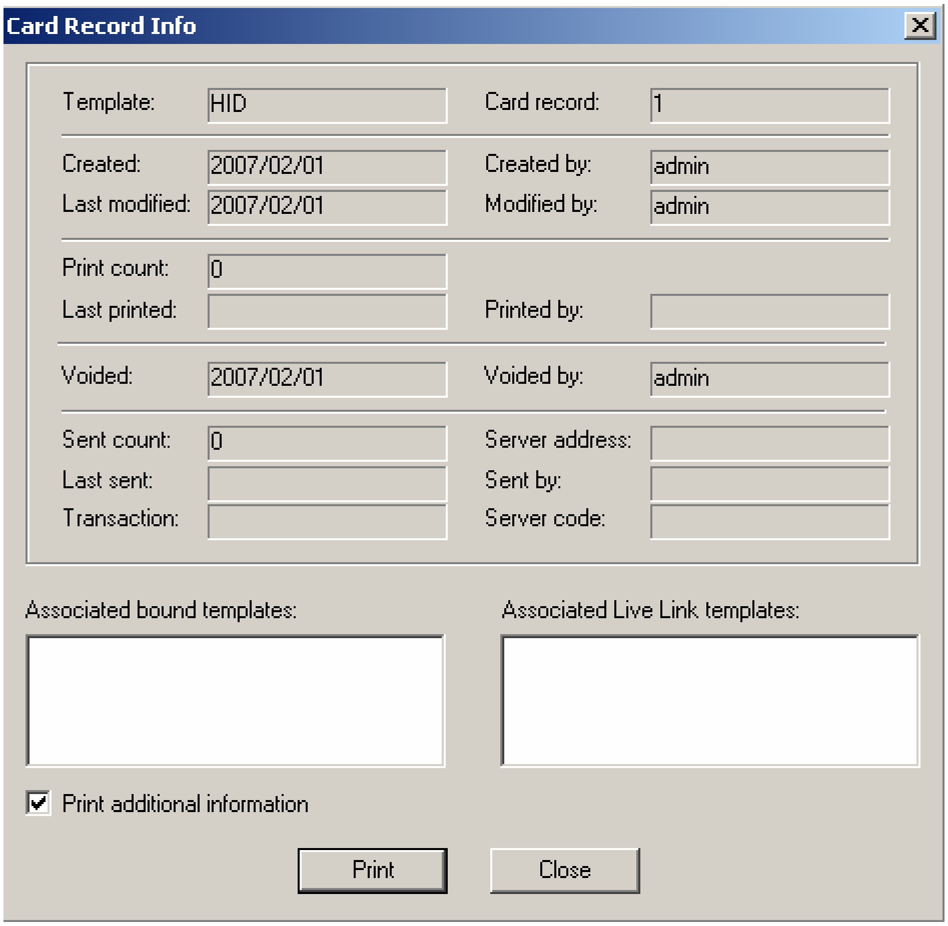
Field & Image Up/Down Buttons



To the left of both the data entry fields and the photograph & signature areas, you **may** see two arrow buttons, used to scroll through either various pages of data entry fields, as well as through multiple photos or signatures. These buttons will only appear if you are using a card template that has more data entry fields than can fit down the length of your screen, or if your template has multiple photographs or signatures on it. When working with the data entry fields, these buttons can be used to move between various 'pages' of fields (which can be filled out in any order), and when working with multiple photos or signatures, the buttons are used to toggle between the various photo and signature capture fields for the card. When switching between different photos and signatures, the 'Name' of the image to capture (as entered when the field was configured in Card Design Center) will be displayed above the image capture area, so that the data entry operator will know which image should be captured or loaded.

Quick Card Info Button

Beside the lower right-hand corner of the data field list in Data Entry Center is the Quick Card Info button. Clicking on this button launches the ‘Card Record Info’ box (shown below) that will provide useful statistics about the card record that is currently displayed.



The information shown by the Card Record Info box is specific to the individual card record that is being displayed in Data Entry Center when the Quick Card Info button is pressed. At the top of the screen, you will see the name of the template that the card record belongs to, as well as the sequence number that the record uses in the database.

The next section down shows the date and time that the record was created, as well as the Asure ID login name of the user who created the card record. Additionally, if the record had been edited (modified) at any point after its initial creation, the time, date, and Asure ID user will be logged here.

Next is a section that shows the number of times the record has been printed, as well as the date and time of the most recent print, as well as the Asure ID user name that issued the print job.

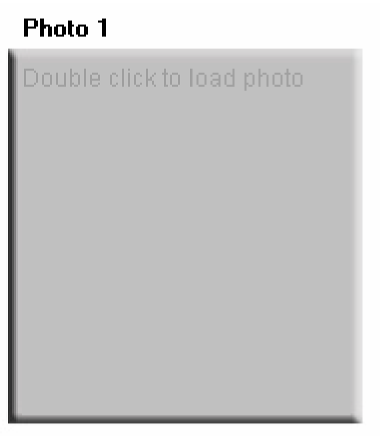
Likewise for a voided card, the date and time, as well as the user that issued the void command, will be displayed on the following line.

Below the void section is a grouping of six fields that are used when card records are sent to a remote Asure ID Server for printing. If the card record has been sent, a counter will show the number of times it was transmitted, as well as some statistics for the most recent transmission: the date and time, transaction number, sender's user login name, record number on the remote server, and the address of the server the card was sent to.

Below the statistical fields in the window are two white boxes, which indicate if the record is part of a 'template binding' relationship, or if it is part of a Live Link configuration. The left-hand box shows the names of any other card templates that the current record is bound to. This would indicate that the record exists in each of these templates. To 'jump' to the corresponding record in one of the bound templates, simply double-click on the name of the bound template you wish to view.

The right-hand box shows any Live Link configurations that the template is connected to. In a similar fashion to the bound templates, you may double-click an entry to 'jump' to the corresponding record in the selected configuration.

Photograph Window



This window will display the photo that goes with each entered card. When entering new or editing existing cards, double-click in this area to import an image from any TWAIN compliant device. To define the default TWAIN device, select 'Image' from the drop-down menu at the top of the screen, then choose 'Select TWAIN Source'.

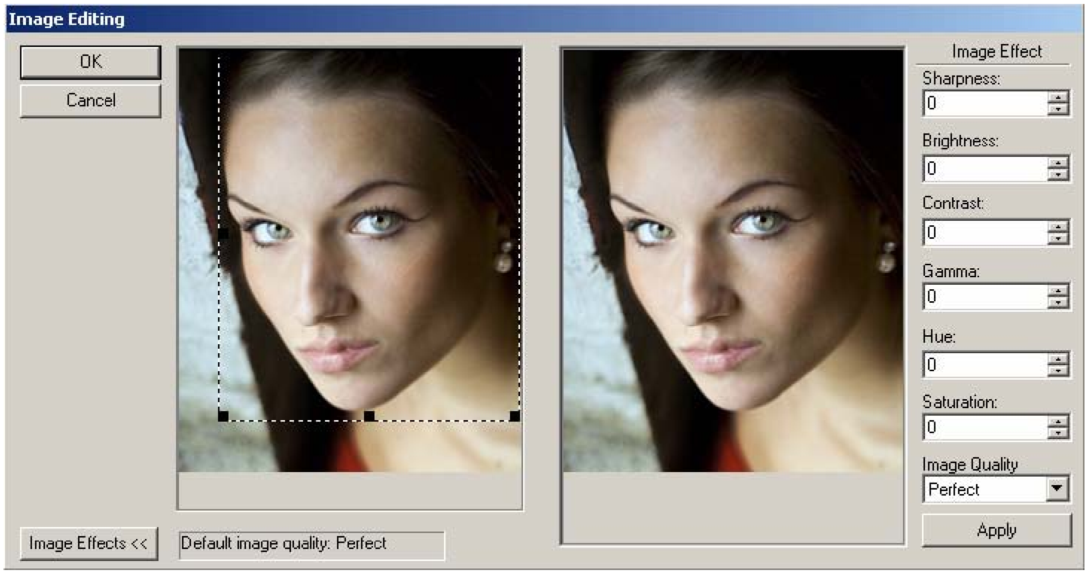
Alternatively, you may load an image file into the photograph field by right clicking on the photograph area, and selecting 'Load Photo'. You will be asked to browse to the image you would like to load, and a preview is available before you make your selection. If you load an image from a file, this will become the default means of image capture, and double clicking the photo field will subsequently launch the 'Browse' dialog letting you load a file.

To restore the TWAIN capture as the default, simply choose the 'Image' drop-down menu, and select 'Photograph' and then 'Acquire photo from TWAIN Source'. After you have captured the TWAIN photo successfully, this will again become the default action when double-clicking the photo area.

Additionally, Asure ID Imago camera users can right-click the photograph area, and select 'Acquire photo from Asure ID Imago' to launch the camera interface. In a similar fashion to loading from a file, a successful photo capture using the method will automatically set the Asure ID Imago to be the default device, launched in subsequent operations by simply double-clicking on the Photograph area.

After an image has been entered into this field (either imported via TWAIN or loaded from a file), the photo can be cropped by right clicking on it and selecting 'Edit Photo', or saved to a standalone file by right-clicking and selecting 'Save Image'.

When cropping with the 'Edit Photo' option, a window will open showing the active selection (see screenshot below). This window provides similar functionality to the Image Editor window described previously, and allows the user to perform both cropping and image enhancement operations. To crop, simply resize the highlighted selection by dragging on the edges of the selection box, and reposition the selection as needed by clicking in the center of the selection box and dragging it (releasing the mouse button when it is in the correct location). When you are satisfied with the selection, press the 'OK' button to import the edited image back into Data Entry Center. This cropping window will automatically appear after an image has be imported via TWAIN, but this behavior can be disabled by choosing the 'Settings' drop-down menu, and choosing 'Auto Crop'. If you do not wish to crop the image at this time simply press the 'Cancel' button.



In addition to cropping, Asure ID provides the user with the ability to fine-tune the appearance of any image file after it has been loaded from disk or imported via TWAIN. To perform image enhancement operations (or to crop your image again), right-click on the photograph in the main Data Entry Center window and select 'Edit Photo', and the press the 'Image Effects' button. On the Image Editing window that appears, there will be adjustments for all the supported image enhancements - Sharpness, Brightness, Contrast, Gamma, Hue, Saturation, and Image Quality.

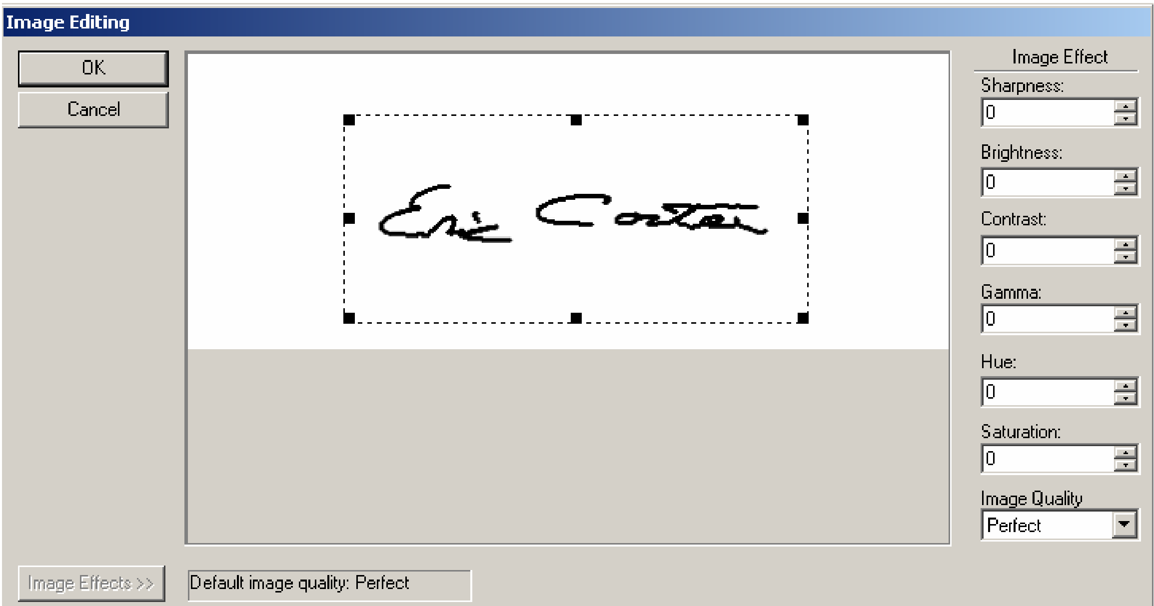
More detailed information on these image enhancement operations can be found in the sub section on Editing Images, in the chapter on Card Design Center Details. When you are satisfied with the appearance press the '**OK**' button to save your changes to the database.

Signature Window

If you have Penware, WinTab or TWAIN compliant signature capture hardware installed on your computer, you can import a signature from it by double-clicking in this area. A window will open showing you the signature as received by the hardware, with an option to 'Clear Display' and try again if the signature is unsatisfactory. When you are happy with the captured results, press the 'OK' button.

Alternatively, to load a signature image from a file on your computer's disk, right-click on the Signature area and select 'Load Signature' to browse for a file. Finally, you may also import a signature image from any TWAIN device. Select 'Image', 'Signature', and 'Import Signature from TWAIN Source' from the drop-down menu bar (at the top of the Data Entry Center screen) to launch the default TWAIN device. Of the three options to load signatures (TWAIN, Penware and Load from File), whichever was last performed will by default be launched by subsequently double-clicking the Signature area in Data Entry

Center. To change this default behavior, simply choose to capture a signature in the manner you wish from the drop-down menu bar, and this will become the default.

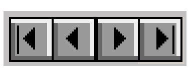


After a signature file has been imported, you may right-click on it and select 'Edit Signature', giving you the option to crop and perform image enhancements on the signature. This cropping and enhancement feature is identical to the one described for photographs.

Data Entry Center Function Buttons

In this section you will find a complete description of the functionality provided by the main Function Buttons, found along the top and left-hand edge of the main Data Entry Center interface.

Card Navigation Buttons



When a template is selected that has more than one card entered into its database, you can use these buttons to navigate through the selected cards. The 'First' button will take you to the first card in the series of selected cards, and the 'Last' button will take you to the last one. These navigation buttons are used when finding a previously entered card that needs to be edited or voided. Between the ‘First’ and ‘Last’ buttons are ‘Previous’ and ‘Next’ buttons that can be used to move one card at a time through the database.

Add Card Button

Add Card - Press this button to add a new card record to the database and enter the relevant data. You may also add a card by right clicking on any of the data entry fields and selecting 'Add Card'.

Edit Card Button

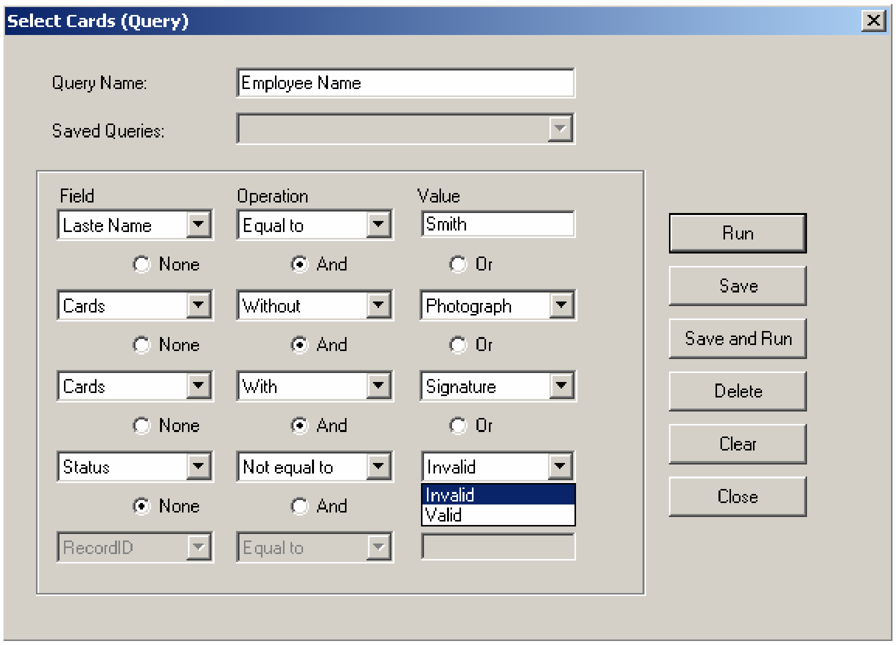
Edit Card - Press this button to 'open' a saved card so that you may edit the information again.

Save Card Button

Save Card - Press this button when you are finished entering the data for a card and want to save it into the active template's database. This button will only be available if you have selected either the 'Add Card' button or by right clicking on any of the data entry fields and selecting 'Add Card' or 'Edit Card' first. You may also save a card by right clicking on any of the data entry fields and selecting 'Save Card'

Select Button

Select - You can use this button to narrow the available selection of cards within a query. By default, all the cards for a given template are 'selected' when the template is chosen. This button gives the user the ability to have only specific cards from a given template selected. After pressing this button, the user will be asked to define the criteria for selecting cards from the template's database.



In the 'Select Records' dialog box that appears, the Fields item lists the various data fields available for the current template. Build your query by selecting the field that matches the criteria you wish to isolate.

Next, define the relationship between the selected field and your selection by choosing an operator (i.e. 'Equal to', 'Less than', 'Greater than', 'Not Equal To', 'And' and 'Or'). After the operator has been selected, enter the value of what is being matched in the 'Value' field (note: the '*' character may be used as a 'wildcard' when entering values, and queries are not case sensitive).

For example, if you wanted to select all the cards from a given template with the last name 'Smith', you would choose 'Last Name' for Field, 'Equal to' for Operation and enter 'Smith' for Value. When you are satisfied with the structure of your query, you can save it for future use by typing a name in the 'Query Name' area and then pressing the Save button.

Saved queries are available from the drop-down 'Saved Queries' field. You can run the query to make your selection by pressing the 'Run' button. The 'Select Records' dialog makes it easy to build even complex custom queries using standard logical operators.

Some examples of properly constructed queries using the information in the illustration above are as follows:

First Name = Linda
First Name =Lin*
Card # < 562

Additionally, after building a one-line query as illustrated above, you may wish to further isolate specific cards. You may follow your first query line by selecting either the 'And' or the 'Or' operation underneath the first line of your query. In this manner, you may create a query built of up to 5 specific expressions. When creating the queries, the 'Field' area also includes the 'Cards' and 'Card Status' items, which can be used to search for cards 'with' or 'without' 'photographs' or 'signatures', or cards that 'have' or 'have not' been 'voided', 'edited' or 'sent'.

Deselect Button

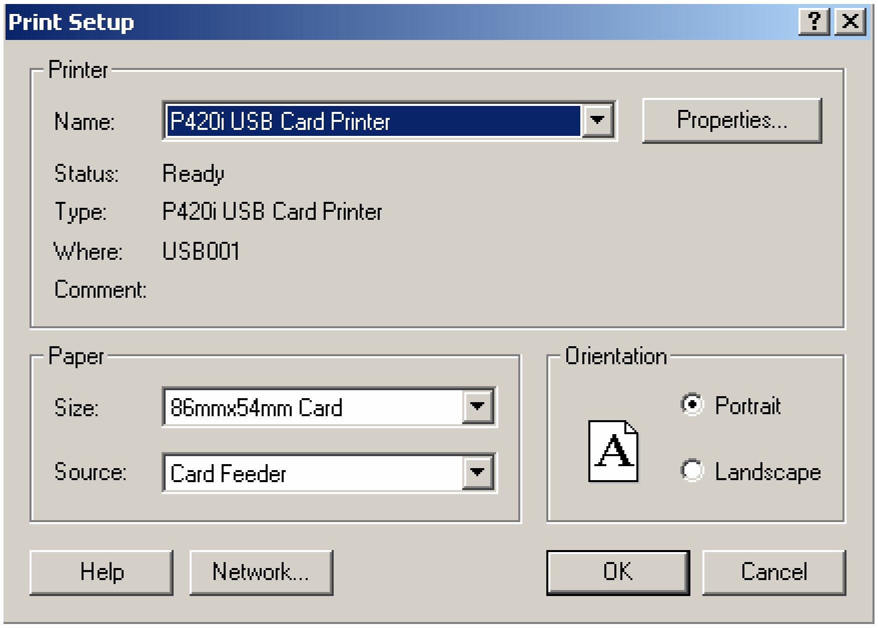
Deselect - If the selection of cards for a given template has been narrowed down with a 'Select' operation (also known as a Query), pressing this button deactivates the selection, and makes all entered cards for the current template active again.

Send Cards Button

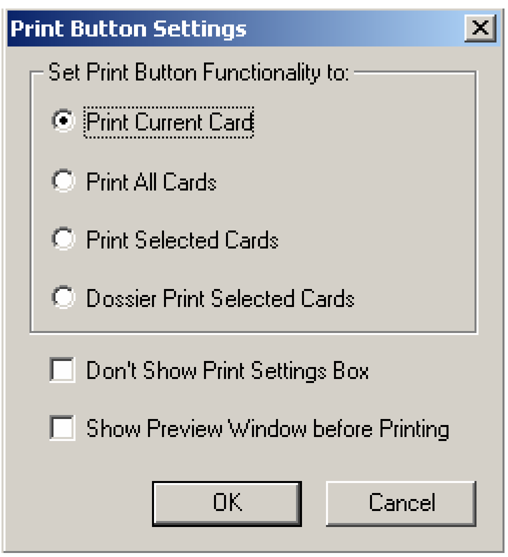
Send Cards - Pressing this button sends all unsent card records to the Asure ID Server. Further options to resend cards, send individual cards, etc. are available in the communications drop down menu at the top of the Data Entry Center screen.

Print

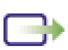
Print - Pressing this button will perform a local print operation of all selected cards. A printer dialog box will appear letting you select and configure the printer that you want to use.



The behavior of this button can be customized to print either 'All Cards', 'All Unprinted Cards', 'Current Card' or 'Dossier Printing Selected Cards', as well as enabling or disabling the printer selection dialog, by using the ‘Settings’ drop down menu and selecting 'Set Print Button'.

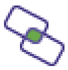


Sent, Void, Printed & Linked Tags

 - Sent

 - Void

 - Printed

 - Linked

Sent, Void, Printed & Linked Tags - After any card record has been successfully transmitted to the Asure ID Server, the 'Sent' tag is displayed with that card's record. This makes it easy to keep track of which cards have and have not been transmitted. A similar tag, marking a 'Void' card, will be displayed with the record of any card that has been voided. Similarly, card records that have been printed will be indicated as such by the ‘Printed’ tag, and for any card record that is linked (or bound) between more than one card template, a 'Linked' tag will appear beside the card. As described above when discussing the Quick Card Info button, when a record is linked, you may ‘Jump’ to the associated record by opening the Card Info box, and double-clicking on the entry for the associated template.

Data Entry Center Navigation Buttons

Card Design Center: Press this button to quickly go from the Data Entry Center to the Card Design Center. Please note that you must have Card Design Center privileges assigned to your user profile for this to work.

Admin Center: Use this button to quickly go from the Data Entry Center to the Admin Center. Please note that you must have Admin Center privileges assigned to your user profile for this to work.

Help: Select this button to jump to Asure ID’s online help file.

Data Entry Center Drop-Down Menu Items

The following items are found at the top of the Data Entry Center's interface, under the headings 'Card Records', 'Card Print', 'Sheet Print', 'Database', ‘Live Link’, 'Image', 'Communication', 'Templates', 'Reports', 'Settings' and 'Help'.

Card Records

The following items are found in the Drop-Down Menu heading '**Card Records**' located at the top of the Data Entry Center main interface.

Select Cards - Makes a selection available from the currently selected cards or template by performing a query. This is the same as pressing the ‘Select’ button on the main Data Entry Center window, and more details on the Select operation are available above, in the section on Data Entry Center Function Buttons.

Deselect - Returns a user from a selected group of cards (within a given template) to the default selection of all cards in the template. This is the same function as pressing the ‘Deselect’ button on the main interface.

First Card - This option selects the first card in a selected series for the current template and selection. This is the same as pressing the ‘First’ button on the main Data Entry Center window.

Previous Card - Selects the record before the currently displayed entry for the current template and selection. This is the same as pressing the ‘Previous’ button on the main window.

Next Card - Selects the next record for the current template and selection. This is the same as pressing the ‘Next’ button on the main window.

Last Card - Selects the last record in the current template and selection. This is identical to pressing the ‘Last’ button on the main window.

Add Card - Create a new card in the active template's database. This is identical to selecting the ‘Add Card’ button on the main window.

Edit Card - Opens the current card record for editing provided it has been saved. You can also perform an Edit Card operation by right clicking over any gray data entry field on a saved card records, and selecting 'Edit Card'.

Save Card - Saves the currently displayed card into the template's database. This is identical to pressing the ‘Save Card’ button on the main interface.

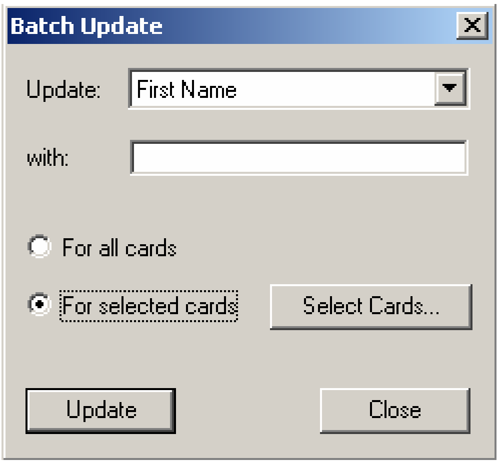
Void Card - Voids the currently displayed card. Cards that have been voided will display a void tag beside the record in the Data Entry Center screen.

Discard Card Changes - This can only be selected when a card record is open, either for editing, or when creating a new record. Selecting this function closes the current record, discarding any changes since it was last saved, or discarding the entire record if it is an unsaved new card. This same functionality is also be achieved by right clicking over any data entry field (on the open card record) and selecting 'Discard Card Changes'.

Delete Card – Deletes the current card record from the database.

Batch Record Creation – This option is used to create a set of empty card records within the database. Selecting this option will launch a prompt asking for the number of cards you would like to create. Enter the number and press ‘OK’. The Data Entry Center will add this number of empty records to the database.

Batch Record Update - Selecting this option will perform a 'Batch Update' operation on the currently selected template. When you choose this function, the 'Batch Update Options' dialog (shown below) will appear, giving you various options for performing the update. The 'Batch Update' feature is ideal in situations such as 'updating all Grade 2 cardholders to Grade 3', or when you need to replace the value in a single field for all cardholders.



To use the batch update, first select the field you want to perform the update on (only one field can be used - if you want to update multiple fields, please perform the 'Batch Update' operation for each field you want to update) from the drop-down 'Update' menu (all data fields on the currently selected card template will be available).

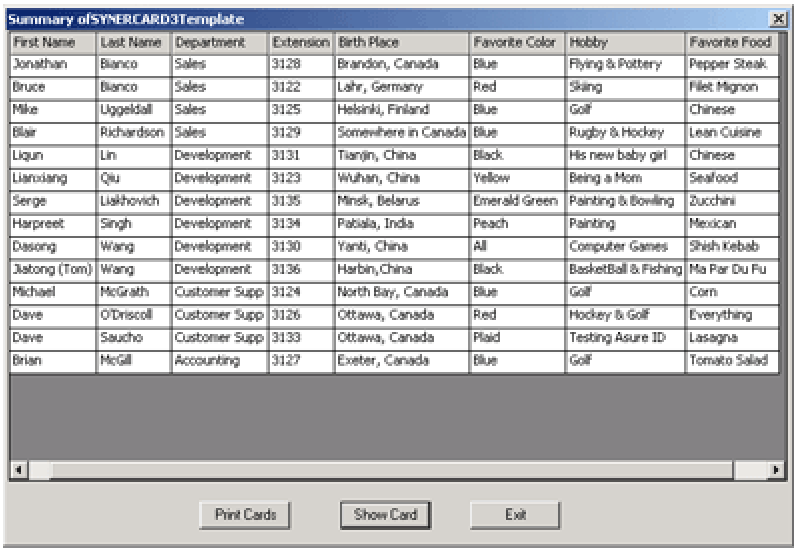
Next, in the 'With' field, enter the text that you would like to use to replace the values in the selected field for all saved cards. If you would like to only perform the batch update on specific cards, and not all the cards in the template, select the 'For Selected Cards' option, and then press the 'Select Cards' button to perform a query (identical to the main Select function described above). After you have configured your selections, press the 'Update' button to perform the update operation.

Show Selected Cards - When chosen after performing a Select (also known as a Query) operation, this option displays a listing of all the selected records. This feature is identical to the listing that is provided under Show All Cards (described below) except that it will only display the records contained within the selected set.

Show All Cards - Displays a listing (example shown below) of all the existing cards and cardholder data for the current template. Data from all the available fields on your card template will be displayed, and the listing can be reordered alphabetically or numerically by clicking on the heading (at the top of the window) you wish to sort by. Clicking on the heading once will sort the data in ascending order, while clicking a second time will sort in descending order.

Selecting an individual record in this window and then pressing the 'Show Card' button will select and display the chosen card in the main Data Entry Center window. If you press the 'Print Cards' button, the displayed records will be printed out in the order that they are currently displayed.

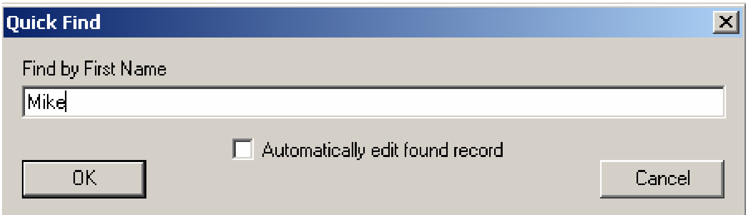
Note that choosing the 'Show All Cards' option after narrowing down the template selection with a Select operation (also known as a Query) will revert the template selection back to display all records for the template. If you would like to see a similar display of all the cards that match your Select operation, select 'Show Selected Cards' from the 'Cards' drop-down menu.


Summary ofSYNERCARD3Template

First Name	Last Name	Department	Extension	Birth Place	Favorite Color	Hobby	Favorite Food
Jonathan	Bianco	Sales	3128	Brandon, Canada	Blue	Flying & Pottery	Pepper Steak
Bruce	Bianco	Sales	3122	Lahr, Germany	Red	Skiing	Filet Mignon
Mike	Uggeldall	Sales	3125	Helsinki, Finland	Blue	Golf	Chinese
Blair	Richardson	Sales	3129	Somewhere in Canada	Blue	Rugby & Hockey	Lean Cuisine
Liqun	Lin	Development	3131	Tianjin, China	Black	His new baby girl	Chinese
Lianxiang	Qiu	Development	3123	Wuhan, China	Yellow	Being a Mom	Seafood
Serge	Liakhovich	Development	3135	Minsk, Belarus	Emerald Green	Painting & Bowling	Zucchini
Harpreet	Singh	Development	3134	Patiala, India	Peach	Painting	Mexican
Dasong	Wang	Development	3130	Yanti, China	All	Computer Games	Shish Kebab
Jiatong (Tom)	Wang	Development	3136	Harbin,China	Black	BasketBall & Fishing	Ma Par Du Fu
Michael	McGrath	Customer Supp	3124	North Bay, Canada	Blue	Golf	Corn
Dave	O'Driscoll	Customer Supp	3126	Ottawa, Canada	Red	Hockey & Golf	Everything
Dave	Saucho	Customer Supp	3133	Ottawa, Canada	Plaid	Testing Asure ID	Lasagna
Brian	McGill	Accounting	3127	Exeter, Canada	Blue	Golf	Tomato Salad

Quick Find - Selecting this item brings up a 'Quick Find' dialog, similar to a Select (or Query) operation, only much simpler. The 'Quick Find' will bring up a simple dialog box (shown below) asking for a line of text, and it will search for matches to this text in the 'Quick Find Field', selecting the cards that match.

Please note that you must first configure the 'hot' Quick Find Field before you can use this feature. The field can be chosen using the 'Quick Find Settings' option found on the Settings drop-down menu. If you have not configured the 'hot field', you will be prompted to do so the first time you select 'Quick Find'. The 'Quick Find' feature can be accessed at any time within Data Entry Center from the keyboard by pressing <CTL>+<F>.

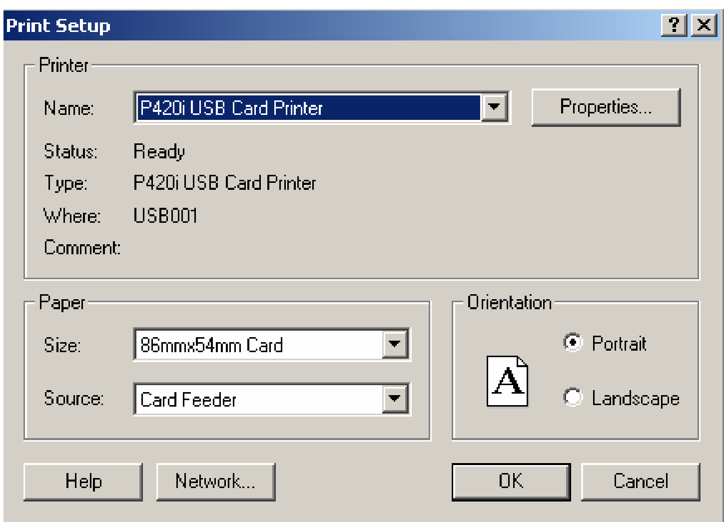


Exit - Exits the Data Entry Center. You will be asked to confirm this choice in order to protect your data and prevent accidentally leaving the application.

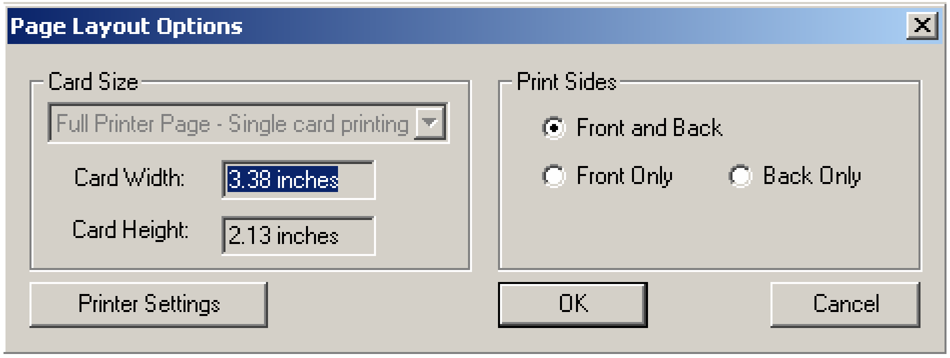
Card Print

The following items are found in the Drop-Down Menu heading '**Card Print**' located at the top of the Data Entry Center main interface.

Set Printer Settings - Choose this option to select a printer and configure the various options available for your printer driver. Asure ID will remember any settings that you make here, and will use these instead of the Windows default settings, whenever you print cards from within Asure ID.



Set Page Settings - Select this option to configure full page printing settings for your printer. This feature is not needed for ID Card printers (single card at a time), but if you will be printing full sized sheets (single or multi-card) you must configure the page dimensions first using this tool. When you select the 'Set Page Settings' item, a configuration menu (shown below) will appear, giving you the option to configure the various dimensions of your sheet.



The options on this dialog are organized into two areas, 'Card Size', 'Print Sides'.

- Card Size - Using the provided drop-down menu, choose the type of page printing you would like to perform. There are various presets for popular card sizes and sheet sizes, as well as an item for a 'Custom Page', allowing the various elements to be entered in by the user. If you choose the custom setting, all items on the dialog must be must be configured.
  - Width - Enter the width of the individual cards on your sheet in this area. If you have selected one of the presets, this item will be grayed out.
  - Height - Enter the height of the individual cards on your sheet in this area. If you have selected one of the presets, this item will be grayed out.
- Print Sides - Use this item to configure single or double-sided printing for your cards. The options are:
  - Front and Back - will print both sides of each card.
  - Front Only - will print only the front sides of each card.
  - Back Only - will print only the back sides of each card.

Preview Displayed Card - Performs a print preview operation of the currently displayed card in the Data Entry Center's main screen. This will allow you to see what the card will look like when it is outputted on the currently selected (or default) printer. Various controls are available on the print preview's screen to zoom in, zoom out, toggle between front side, backside and both sides, and to print the card.

Print Displayed Card - Prints the currently displayed card on a local printer. After selecting this item, a Printers dialog box will appear, letting you select the desired print device, and set any driver-specific settings for the printer.

Print All Cards - Prints all cards in the currently selected template on a local printer. After selecting this item, a Printers dialog box will appear, letting you select the desired print device, and set any driver-specific settings for the printer.

Print Selected Cards - Prints all cards matching a Select (query) operation on a local printer. After selecting this item, a Printers dialog box will appear, letting you select the desired print device, and set any driver-specific settings for the printer.

Encode Smart Card – If you are reading or encoding smart cards using a standalone card coupler (as opposed to a coupler that has been integrated inside a card printer), this item is used to manually encode/read the card for the currently displayed record in Data Entry Center. After selecting this item, the user will be prompted to insert the card into the reader/encoder unit, and then press 'OK' to proceed. Before using this item, the standalone reader/encoder unit must be configured using the 'Advanced Encoding Settings' option, found on the 'Settings' drop-down menu, and discussed in detail below.

Auto Print Mode Procedure

"Auto Print Mode" is a feature in the Card print menu in Data Entry Center. The feature allows the monitoring of the current template's live link database table and automatically prints all unprinted cards. Auto Print will automatically print all unprinted cards added from other software or locations as well. Auto Print monitors the selected template that you open in the Data Entry Center (DEC).

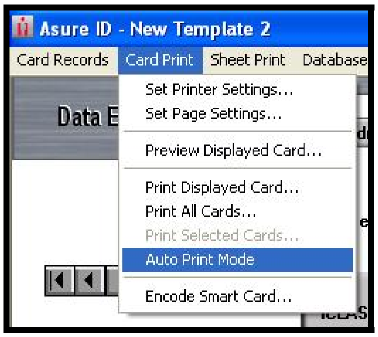
Invoke "Auto Print Mode"

Before you begin, ensure that your printer is set up and that blank cards are loaded in the hopper.

1. Go to the "Data Entry Center" (DEC) screen.

2. Open the template you want to monitor in the background.

3. Select "Card Print" from the Menu bar and click on "Auto Print Mode" on the drop down selection list.



4. "Auto Print Mode" minimizes the DEC screen into an icon in the bottom right hand side of your computer screen.

Note1: Auto Print Mode is invoked and continues until you cancel it or quit the DEC.

Note2: From time to time a progress box may flash quickly across your screen. This indicates that a new card has been located and is being printed.

Stop "Auto Print Mode"

Use the method that best suits your needs.

1. To stop "Auto Print Mode" and return to the DEC screen do one of the following:

   - Double click the "Auto Print Mode" icon located in the bottom right hand corner of your computer screen. "Auto Print Mode" cancels and you are returned to the DEC screen.

   - Right click the "Auto Print Mode" icon located in the bottom right hand corner of your computer screen. Click once on the "Stop Auto Print" selection. "Auto Print Mode" cancels and you are returned to the DEC screen.

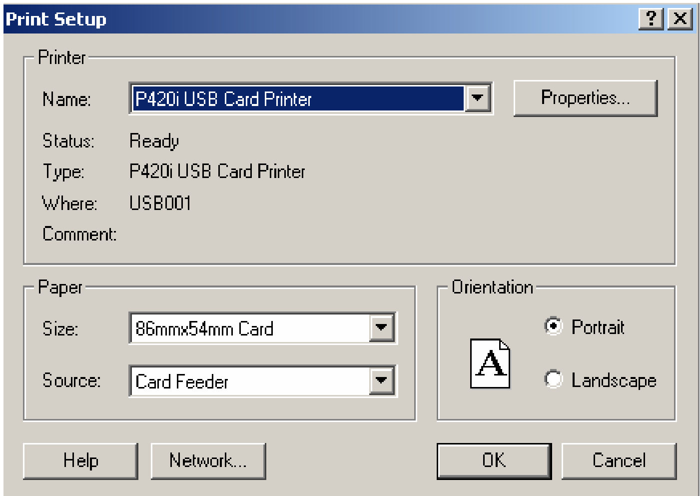
2. To stop "Auto Print Mode" and exit the DEC screen.

   - Right click the "Auto Print Mode" icon located in the bottom right hand corner of your computer screen. Click once on the "Exit DEC" selection. "Auto Print Mode" cancels and the DEC quits.

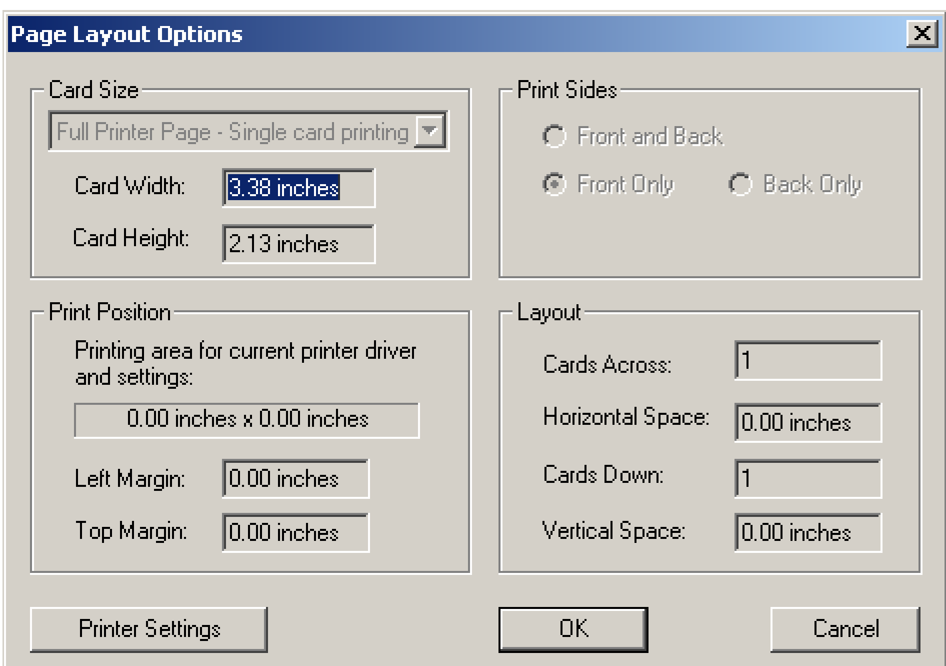
Sheet Print

The following items are found in the Drop-Down Menu heading '**Sheet Print**' located at the top of the Data Entry Center main interface, and are used when performing multi-card/sheet printing (as opposed to single card printing).

Set Printer Settings - Choose this option to select a printer and configure the various options available for your printer driver. Asure ID will remember any settings that you make here, and will use these instead of the Windows default settings, whenever you print cards from within Asure ID.



Set Page Settings - Select this option to configure full page printing settings for your printer. This feature is not needed for ID Card printers (single card at a time), but if you will be printing full sized sheets (single or multi-card) you must configure the page dimensions first using this tool. When you select the 'Set Page Settings' item, a configuration menu (shown below) will appear, giving you the option to configure the various dimensions of your sheet.



The options on this dialog are organized into four areas, 'Card Size', 'Print Sides', 'Print Position' and 'Layout'.

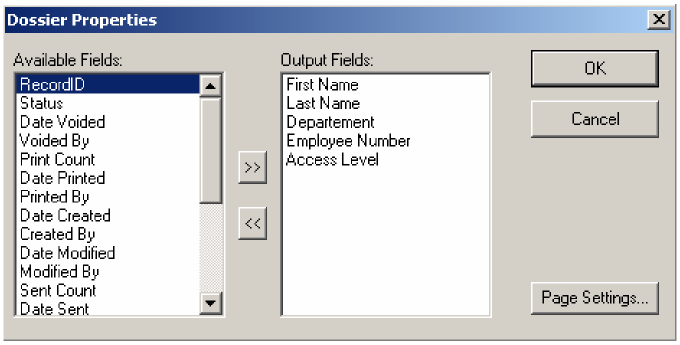
- Card Size - Using the provided drop-down menu, choose the type of page printing you would like to perform. There are various presets for popular card sizes and sheet sizes, as well as an item for a 'Custom Page', allowing the various elements to be entered in by the user. If you choose the custom setting, all items on the dialog must be must be configured.
    - Width - Enter the width of the individual cards on your sheet in this area. If you have selected one of the presets, this item will be grayed out.
    - Height - Enter the height of the individual cards on your sheet in this area. If you have selected one of the presets, this item will be grayed out.
- Print Sides - Use this item to configure single or double-sided printing for your cards. The options are:
    - Front and Back - will print both sides of each card.
    - Front Only - will print only the front sides of each card.
    - Back Only - will print only the back sides of each card.

- Print Position - The dimensions shown in this dialog box are taken from the print driver, which returns measurements of the per-card printing area. Additionally, two items become available for configuration when working with custom print layouts:
    - Left Margin - Enter the measurement (in inches) from the extreme left-hand edge of the page, to the extreme left-hand edge of the leftmost cards on the page. The software needs this to know the spacing of the cards for custom printed sheets.
    - Top Margin - Enter the measurement (in inches) from the extreme top edge of the page, to the extreme top edge of the uppermost cards on the page. The software needs this to know the spacing of the cards for custom printed sheets.
- Layout – The items in this section are used to configure the number of cards, as well as the spacing for those cards, on your printed sheet.
    - Cards Across - When working with custom printed sheets, enter the number of cards across (from left to right) the sheet of paper. The software needs this to know the spacing of the cards for custom printed sheets.
    - Horizontal Space - When working with custom printed sheets of more than one card across, enter the space (in inches) between the right-hand edge of the left card, and the left-hand edge of the right card. The software needs this to know the spacing for cards on a custom printed sheet.
    - Cards Down - When working with custom printed sheets, enter the number of cards down (from top to bottom) the sheet of paper. The software needs this to know the spacing of the cards for custom printed sheets.
    - Vertical Space - When working with custom printed sheets of more than one card down, enter the space (in inches) between the bottommost edge of the top card, and the

uppermost edge of the card below it. The software needs this to know the spacing for cards on a custom printed sheet.

- Printer Setting - Select this button to choose a printer (and set printer options) for outputting your sheet printing. When you are satisfied with the settings, press the 'OK' button to save your settings.

Dossier Printing Settings - If you are going to print a dossier report of your current or selected cards, you must first select this item to specify the properties for the dossier print. A 'Dossier Properties' dialog box (shown below) will appear, allowing you to configure the settings for your dossier.



On the left hand side of the 'Dossier Properties' dialog box is a column entitled 'Available Fields'. This column lists all the fields on the currently selected template, and you may choose the fields you would like represented in your dossier print. To add a field to the dossier's output, select the field from the 'Available Fields' column, and add it to the 'Output Fields' column by pressing the '>>' button. To remove a field from the 'Output Fields' column, simply select the field from the right hand column, and press the '<<' button. When you are satisfied with your selections, press the 'OK' button to save the settings.

Preview All Cards - Performs a print preview of the sheet output for all cards. Please note that you must first configure the ‘Set Page Settings’ option (discussed above) before you can use this item.

Preview Selected Cards - Performs a print preview of the sheet output for all cards meeting a selection (query) operation. Please note that you must first configure the ‘Set Page Settings’ option (discussed above) before you can use this item.

Dossier Preview Selected/All Cards - Performs a print preview of the dossier output for all cards (or for those meeting a ‘Select’ (query) operation). Please note that you must first configure the ‘Dossier Printing Settings’ (discussed previous) before you can use this item.

Print All Cards - Prints all cards in the currently selected template on a local printer in the sheet print format. After selecting this item, a Printers dialog box will appear, letting you select the desired print device, and set any driver-specific settings for the printer. Please note that you must first configure the 'Set Page Settings' option (discussed above) before you can use this item.

Print Selected Cards - Prints all cards matching a 'Select' (query) operation in the currently selected template on a local printer in the sheet print format. After selecting this item, a Printers dialog box will appear, letting you select the desired print device, and set any driver-specific settings for the printer. Please note that you must first configure the 'Set Page Settings' option (discussed above), as well as perform a 'Select' (query) operation before you can use this item.

Dossier Print Selected/All Cards - Prints all cards in the currently selected template on a local printer in the 'Dossier' sheet print format. After selecting this item, a Printers dialog box will appear, letting you select the desired print device, and set any driver-specific settings for the printer. Please note that you must first configure the 'Set Page Settings' option (discussed above), as well as the 'Dossier Printing Settings' (also discussed above) before you can use this item.

Batch Print Record Info – Selecting this option will batch print the 'Card Record Info' (shown with the 'Quick Card Info' button, discussed above) sheets for the selected cards in the template.

Database

The following items are found in the Drop-Down Menu heading '**Database**' located at the top of the Data Entry Center main interface.

NOTE: These descriptions provide a basic overview only. For complete details on using the database input/output features, please refer to the chapter on Database Details.

Import Wizard - Launches the Import Wizard to import records from an existing database file.

Export Wizard - Launches the Export Wizard to export existing records into a new database file.

Archive This Card - Creates a copy of the data contained in a currently displayed card record in a new database file, and then provides the option to delete the card record from Data Entry Center. When creating an archive, you will be prompted for a location to write the archive file into, as well as a name for the archive.

Archive Selected Cards - Creates a copy of the data contained in currently selected card records in a new database file, and then provides the option to delete the records from Data Entry Center. This can only be used after performing a Select (query) operation. When creating an archive, you will be prompted for a location to write the archive file into, as well as a name for the archive.

Archive All Cards - Creates a copy of the data contained in all card records for the selected template in a new database file, and then provides the option to delete the records from Data Entry Center. When creating an archive, you will be prompted for a location to write the archive file into, as well as a name for the archive.

Restore - Selecting this item will restore all card records contained in a database file that was created with one of the 'Move to Archive' options described above. You will be asked to browse to the archive file that was created, and then the records will automatically be restored to the template database that they were archived from, and as such this template must exist prior to performing this operation.

Refresh Database - When working with a shared database, choosing this option reloads the database to the local computer so that any changes by other networked users can be seen.

Live Link

The following items are found in the Drop-Down Menu heading '**Live Link**' located at the top of the Data Entry Center main interface.

NOTE: These descriptions provide a basic overview only. For complete details on using the database input/output features, please refer to the chapter on Database Details.

Add LLF – Select this item to create a new Live Link configuration.

Edit LLF – Select this item to edit an existing Live Link configuration.

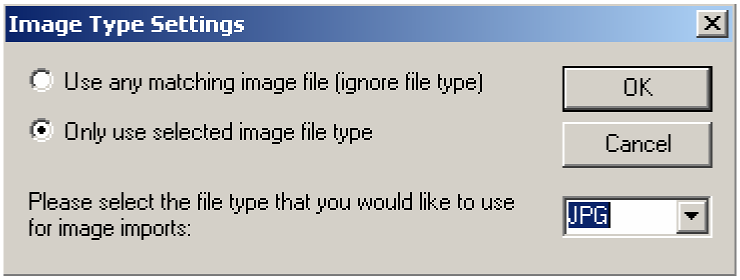
No Live Link – If there is currently a Live Link configuration active, selecting this option will disable the Live Link configuration, and return Asure ID Exchange to its own native database for the reading and storage of cardholder data.

Live Link Saved Entries – If you have previously configured and saved a Live Link configuration, all recently used configurations will be listed in this section. You may ‘switch to’, or enable one of the configurations simply by clicking on it in this menu. Please note that this will disconnect Asure ID Exchange from the current database, and instead read/write cardholder records using the database specified in the Live Link configuration. The previous cardholder records are not deleted; they are simply no longer shown, as the software is now looking to a different database.

Image

The following items are found in the Drop-Down Menu heading '**Image**' located at the top of the Data Entry Center main interface.

Image Type Settings – This item is used to select the format of images that are to be used when performing external image saves under Live Link, as well as to set the default image type for Import Wizard operations. Selecting this item will bring up an 'Image Type Settings' window (shown below). On this window, the default setting is to 'Use any matching image file (Ignore type). This option will be used most of the time, however if you have multiple image types with conflicting filenames and need to perform an Import Wizard operation, it will be valuable to set the default image type. The Import Wizard engine will then ignore the other file types. To set a default image format, select the 'Only use selected image file type' button, and then use the drop-down menu to select your default file type.



Select TWAIN Source - Allows the user to select the default image capture device from any installed TWAIN-compliant hardware (i.e. Digital Camera, Scanner, Video Capture Device etc.). After selecting this option, a TWAIN menu will appear, listing all of the TWAIN compliant hardware that has been installed on the system. Simply select the device that you wish to be the default, and press 'OK'.

Photograph

- Load Photo - Allows the user to load a photograph image from a file on your computer rather than importing via TWAIN. This is the same as right clicking in the Photograph field on the main window and selecting 'Load Image'. After successfully capturing your image using this method, it will become the default image capture operation when you double click the photograph area in Data Entry Center.
- Save Photo - Lets the user save the current photo image to a standalone file on the computer's disk. This is the same function as right clicking on the Photograph field of the main window and selecting 'Save Image'.
- Edit Photo - Allows the user to perform cropping and image enhancement operations on the photograph image, as discussed previously in the 'Photograph' section of this chapter.
- Acquire Photo from Asure ID Imago - Capture an image from the Asure ID Imago integrated camera. After successfully capturing your image using this method, it will become the default image capture operation when you double click the photograph area in Data Entry Center. Please note that you must have an Asure ID Imago camera installed in order to use this item.
- Acquire Photo from TWAIN Source - Capture an image from the default TWAIN-compliant device. After successfully capturing your image using this method, it will become the default image capture operation when you double click the photograph area in Data Entry Center.

Signature

- Load Signature - Allows the user to load a signature image from a file on the computer's disk. This is the same feature as right clicking in the Signature field on the main window and selecting 'Load Signature Image'. After successfully capturing your image using this method, it will become the default image capture operation when you double click the signature area in Data Entry Center.
- Save Signature - Allows the user to save the current signature image to a standalone file on the computer's disk. This is the same feature as right clicking in the Signature field on the main window and selecting 'Save Signature Image'.
- Edit Signature - Allows the user to crop and perform image enhancements on the current signature image. This is the same feature as right clicking in the Signature field on the main window and selecting 'Edit Signature'.
- Acquire Signature from TWAIN Source - Import a signature image from the default TWAIN device. After successfully capturing your image using this method, it will become the default image capture operation when you double click the signature area in Data Entry Center.
- Acquire Signature from Penware -Allows the user to capture a signature from a Penware brand signature capture unit (Asure ID supports the Penware® 1100 & 1400). You must have the device properly installed and configured for use with your computer before this option will work. After successfully capturing your image using this method, it will become the default image capture operation when you double click the signature area in Data Entry Center.
- Acquire Signature from WinTab -Allows the user to capture a signature from a WinTab-based signature capture unit. You must have the device properly installed and configured for use with your computer before this option will work. After successfully capturing your image using this method, it will become the default image capture operation when you double click the signature area in Data Entry Center.

Communication

The following items are found in the Drop-Down Menu heading '**Communication**' located at the top of the Data Entry Center main interface.

Send Displayed Card - Sends the currently displayed card to the Asure ID Server. Please note that you must have both registered with the remote server, as well as have the 'Send Cards' privilege assigned to your user profile before you can use this option.
Send Selected Cards - Sends all cards in the currently active selection (after performing a Select, or query, operation) to the Asure ID Server. Please note that you must have both registered with the remote server, as well as have the 'Send Cards' privilege assigned to your user profile before you can use this option.

Send Selected Cards - Sends the currently ‘seclected’ group of cards to the Asure ID Server. This is either the full set of records in the database, or a subset resulting from running a ‘Select’ or ‘QuickFind’ operation.

Send All Unsent Cards - Sends all cards in the current selection that have not yet been submitted to the Asure ID Server. This is the same functionality as pressing the Send Cards function button on the main Data Entry Center screen. Please note that you must have both registered with the remote server, as well as have the Send Cards privilege assigned to your user profile before you can use this option.

Send Template Data - Sends all template-specific data such as design & layout, background images and logos from the currently selected template to the Asure ID Server. When a new card template is designed, the template data must be sent to the Asure ID Server before cards can be submitted. Template data only needs to be sent to an Asure ID Server once, unless cosmetic changes are made to the template file in Card Design Center. Templates which have cards already sent to the Asure ID Server cannot be modified in such a way as to change their database structure.

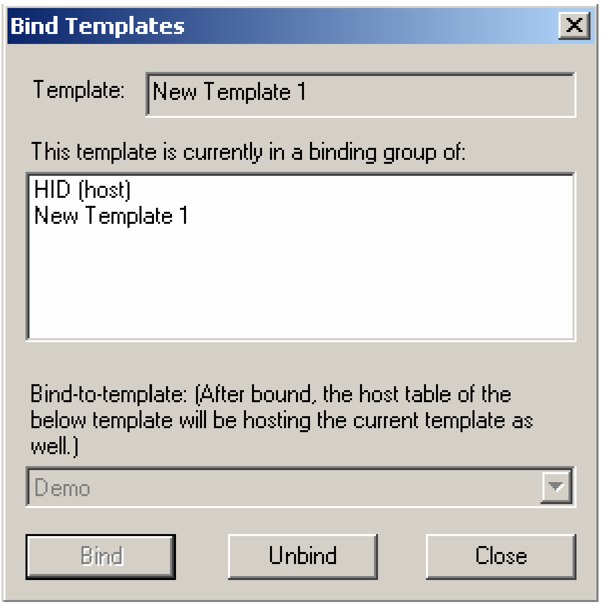
Templates

The following items are found in the Drop-Down Menu heading '**Templates**' located at the top of the Data Entry Center main interface.

Show All Templates - Displays a listing of all templates available on Data Entry Center's drop-down template selection menu. This list includes the date that the template was created, the user that created it, as well as the date that it was last modified. Additionally, you may select any template file and press the 'Delete' button to remove it from the Asure ID database. This will simply remove the template file itself, and not any card database records which have been added to the template.

If you have cards saved to the template database, and want to completely delete everything relating to the template, please Archive the records and delete them from the database before removing the template using this function.

Bind Templates - Select this item to bind multiple templates together. When in use, any data entered into any field on one template will be duplicated into any field with the same name and data type for any template it is bound to. Template binding is only available for templates that do not have Live Link activated.



If the template is not yet bound, you may use this dialog to bind it to additional templates. Using the drop-down menu at the bottom of the screen, select a template to bind to, and then press the ‘Bind’ button. Please note that if there are records in one (or more) of the templates before binding, the records in the ‘Host’ template will remain, and those in the subsequent bound templates will be ignored, reading instead the records from the Host database table.

If you currently have templates in a binding configuration, you may also use this menu to break a binding. Select the binding you wish to remove, and then press the ‘Unbind’ button. Please note that unbinding templates will not cause records to be removed – the host template will continue to read and write from the same record set that was available during the binding relationship, and any secondary bound templates will revert back to their original data set (that was preset before the binding took place).

Binding/Unbinding Templates Procedure

A host template is the template that contains fields that you want to reuse in another template.
A bound template is the subordinate template that you bind to the host. When binding is applied to templates, the bound template shares selected fields of the host template.

Host and bound templates cannot be deleted while they are bound. If you want to delete a host or one or more of its bound templates you will have to “unbind” the templates before deleting them.

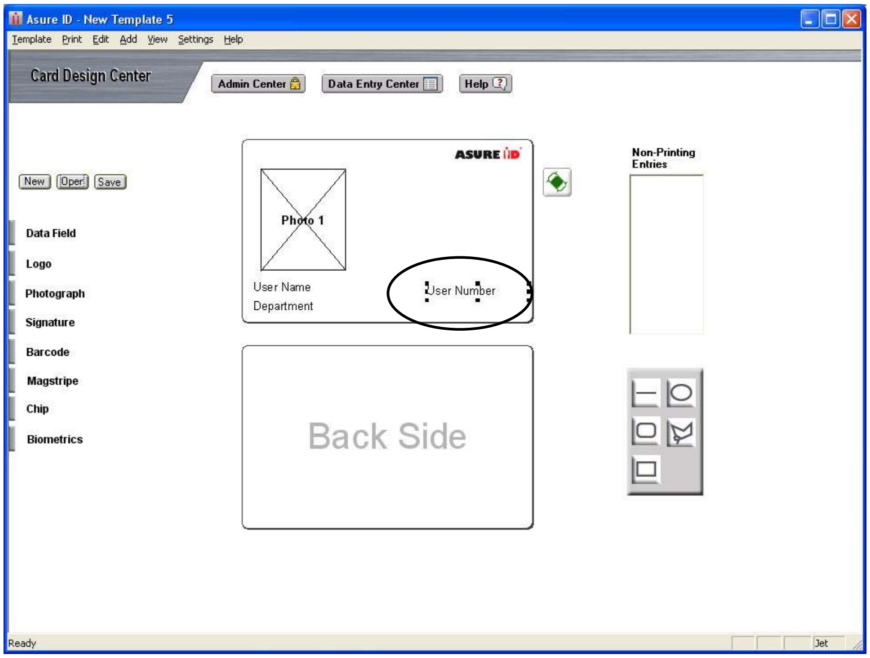
Note: Binding is only available for templates that do not have Live Link activated.

Binding in the Card Design Center

Use this procedure when you want to bind only selected fields from a host template to another template. This other template becomes a bound template when this procedure is complete.

23. Open the “Card Design Center” (CDC).

24. Open the template you wish to use as your host template. **Note:** In our example it is template 5.

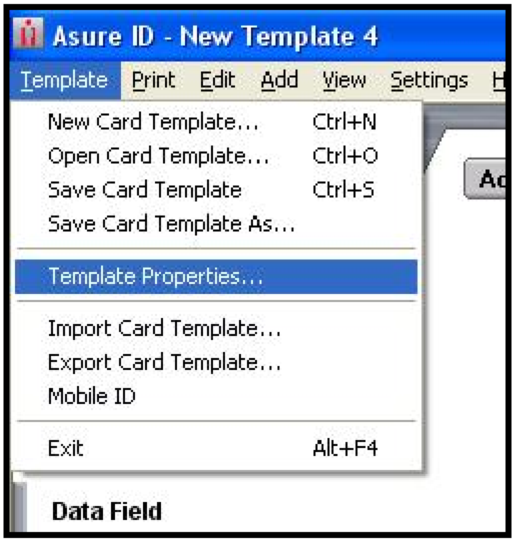


25. Take note of the spelling of the field name (e.g., User Number) you wish to add to your new or existing unbound template.

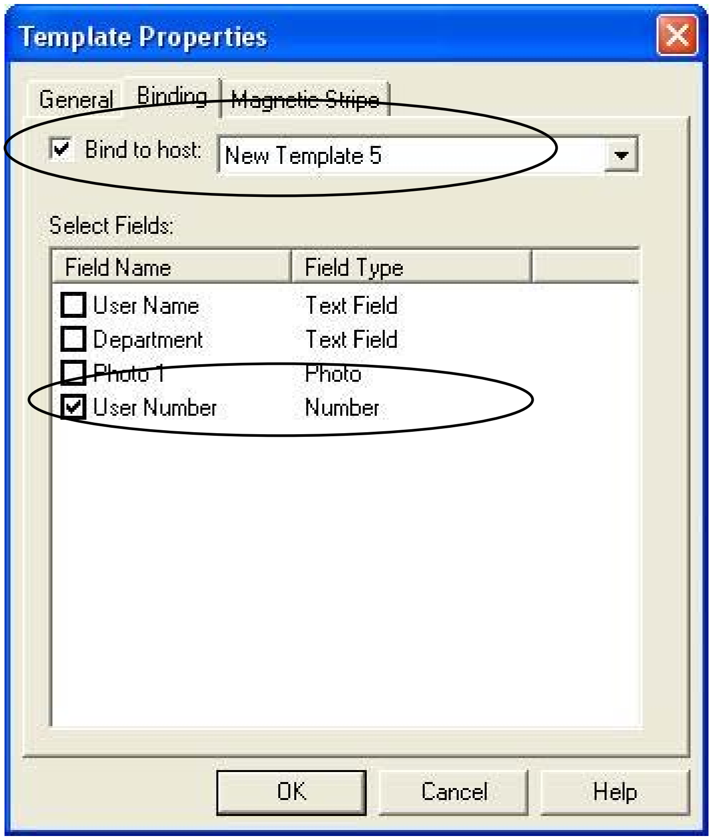
26. Open the unbound template where the field is to be added. **Note:** In our example it is template 4.

27. Click “Template” on the menu bar.

28. Click the “Template Properties” selection.



29. The dialog box displays. Click on the "Binding" tab.



30. Select the host template (e.g., New Template 5).

31. Check the “Bind to host” selection.

32. Verify that the desired data field has been checked. **Example:** In the screen shot above it is the “User Number” box that is checked.

33. Click “OK”.

34. Save the template.

35. Open the “Data Entry Center” (DEC).

36. Click on the “Database” selection on the menu bar.

37. Click on the selection “Refresh Database”.

The data image field has been added to your template and both the field and the template have been bound to your selected host template.

Binding in the Data Entry Center

1. Open “Card Design Center”.

2. Open the template that you are designating as your host template.

3. Take note of the spelling of the field name(s) you wish to add to your unbound new or existing template.

4. Create your new template, if you have not already done so. This is the template you ant to bind to your host template.

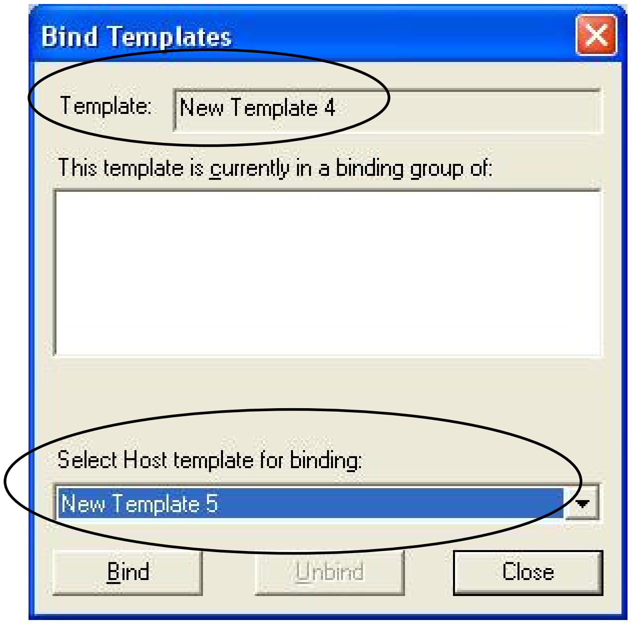
5. Save your new template.

6. Open the “Data Entry Center”.

7. Select your unbound template.

8. Select “Templates” from the menu bar.

9. Select “Bind Templates…”



10. In the section “Select Host template for binding”, select the template you want to use as the host template from the drop down list. **Note:** In the example this is New Template 5.

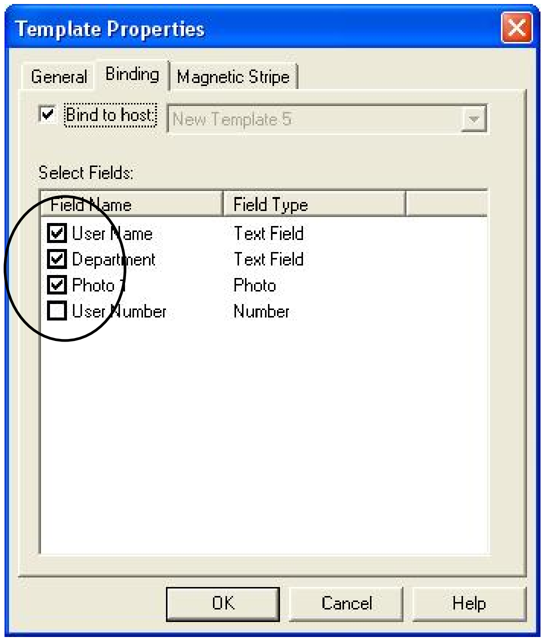
11. Click the “Bind” button. **Note:** The host template is designated on this binding group.

12. Click the "Close" button to return to the DEC.

13. Select "Database" on the menu bar and click on "Refresh Database".

14. In the Card Design Center, click on "Template Properties" and then click on the "Binding" tab.

The fields you created that matched the host template are checked.


Template Properties
General
Binding
Magnetic Stripe
Bind to host:
New Template 5
Select Fields:
Field Name
Field Type
User Name
Text Field
Department
Text Field
Photo 1
Photo
User Number
Number
OK
Cancel
Help

Notes on Unbinding Templates

If you have templates in a binding configuration, you may also use the Templates Properties feature in the CDC and the Bind Templates feature in the DEC to break a binding.

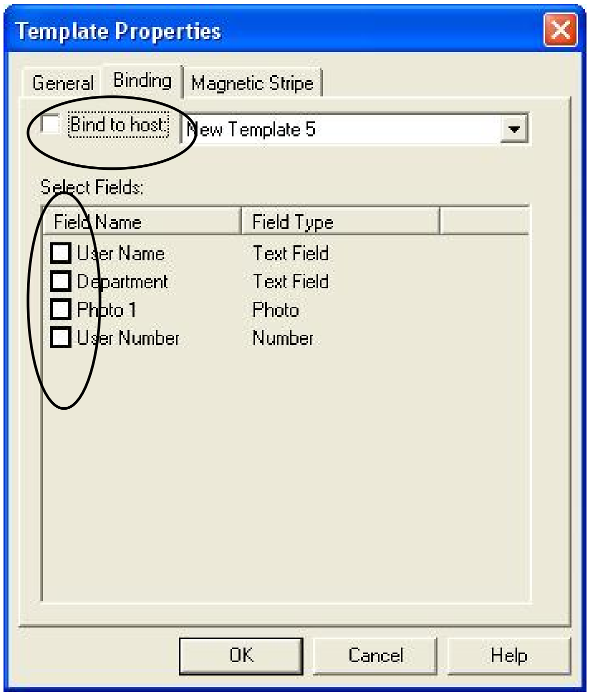
Note: Unbinding templates will not cause records to be removed – the host template will continue to read and write from the same record set that was available during the binding relationship and any secondary bound templates will revert back to their original data set (i.e., the data set that was preset before the binding took place).

In the CDC:

1. Call up the “Template Properties” screen for your bound template and deselect the “Bind to host” selection

2. Click OK.

   The field names are deselected and the binding is broken.



In the DEC:

1. Display your bound template.

2. Click on Templates and select “Bind Templates” on the drop down menu.

3. Click the “Unbind” button on the screen.

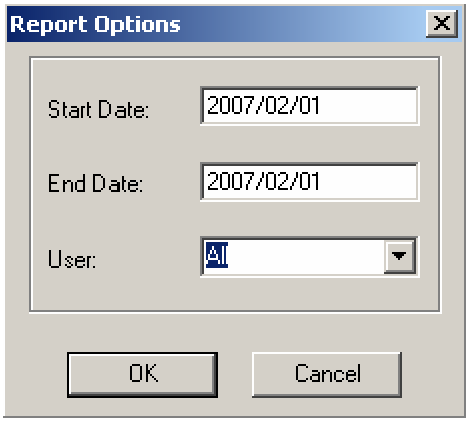
4. Respond yes when the dialog box asks you if you want to break the binding relationship.

   Your templates are now unbound.

Reports

The following items are found in the Drop-Down Menu heading '**Reports**' located at the top of the Data Entry Center main interface.

Selecting one of these items will display a report of Asure ID activity matching the operation you have chosen for the selected template. When requesting a report, you will be asked to supply the 'Start Date' and the 'End Date' for the time period you wish the report to represent, as well as the 'User' you wish to view a report on. When selecting a 'User', a drop-down menu provides a list of all Asure ID users on your machine, as well an option for 'All Users'.



All Activity - Displays a report on all activity within the Data Entry Center for the selected user(s) between the selected dates. The report will show details (including date and time) for any 'Add Card', 'Edit Card', 'Print Card(s)', 'Void Card', 'Sent Card' or 'Send Template Data' operation.

Cards Entered - Displays a report of all cards entered to the selected template database by the chosen user between the selected dates.

Cards Edited - Displays a report of all cards entered in the selected template database that have been edited by the chosen user between the selected dates.

Cards Printed - Displays a report of all cards entered in the selected template database that have been printed by the chosen user between the selected dates.

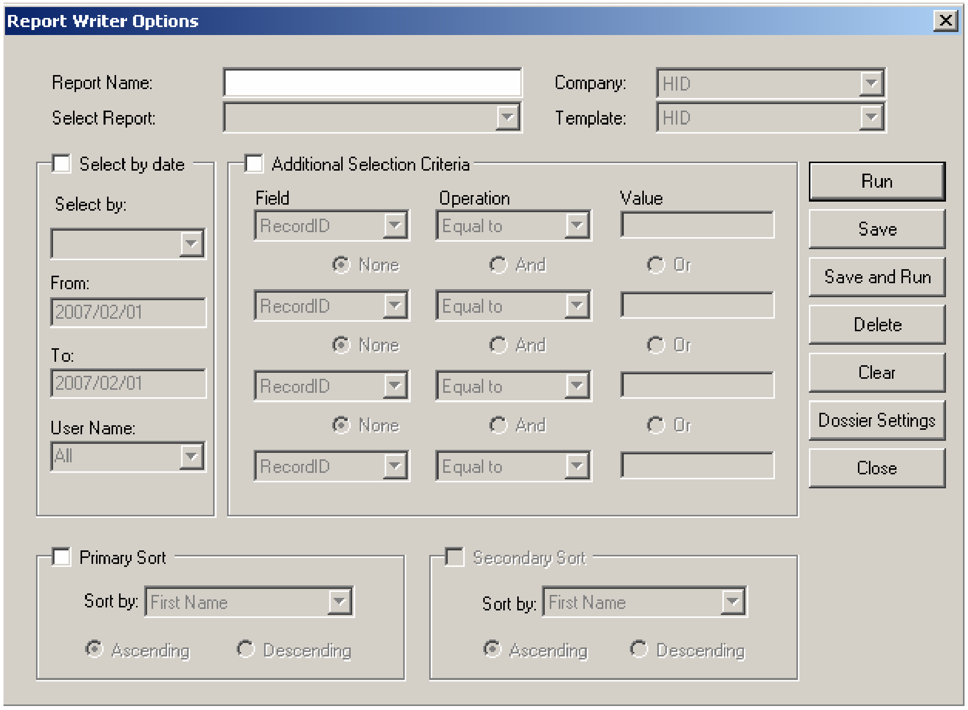
Cards Voided - Displays a report of all cards entered in the selected template database that have been voided by the chosen user between the selected dates.

Cards Sent - Displays a report of all cards entered in the selected template database that have been sent by the chosen user between the selected dates.

Cards Without:

- Photo - Displays a report of all cards entered in the selected template that do not have any photographs saved with their record(s).
- Signature - Displays a report of all cards entered in the selected template that do not have any signatures saved with their record(s).
- Photo & Signature - Displays a report of all cards entered in the selected template that do not have any photographs or any signatures saved with their record(s).

Custom Report - Choosing this item launches the custom report writer (shown below). This ad hoc reporting tool functions in a very similar manner to the 'Select' tool (described previously), but includes extra options to select cards that have had specific operations (such as '**edit card**', '**void card**', etc.) performed between specified dates.



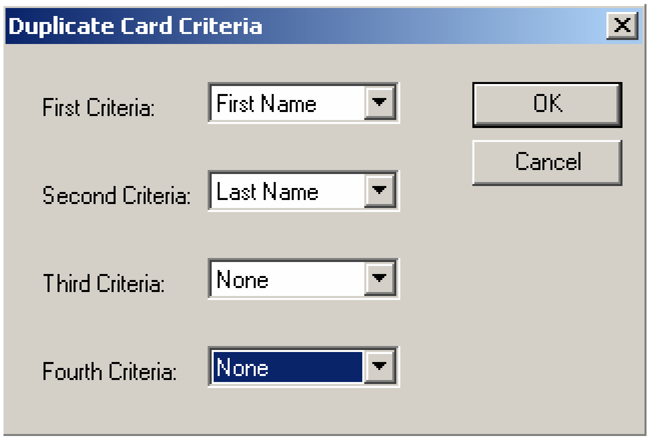
Additionally, the ordering (sorting) of the displayed results can be configured to provide the results in a variety of fashions. When the report appears, it may be printed, or the '**Print as Dossier**' option chosen to output a dossier-style report of the selected cards, including photographs. If you are going to select this item, first press the 'Dossier Settings' button, to configure the dossier print output fields.

Settings

The following items are found in the Drop-Down Menu heading '**Settings**' located at the top of the Data Entry Center main interface.

View Status Bar - Deselecting this item removes the 'status bar' from the bottom of the Asure ID interface.

Define Duplicate Card Criteria - Select this item to define the duplicate card criteria for your current template. The 'Duplicate Card Criteria' selection gives you the option to choose up to four different values (based on the data fields you have created for your card) that will override Data Entry Center's ability to create a new card when a duplicate value is entered. Simply choose from the data fields you want to monitor for duplicate entries.



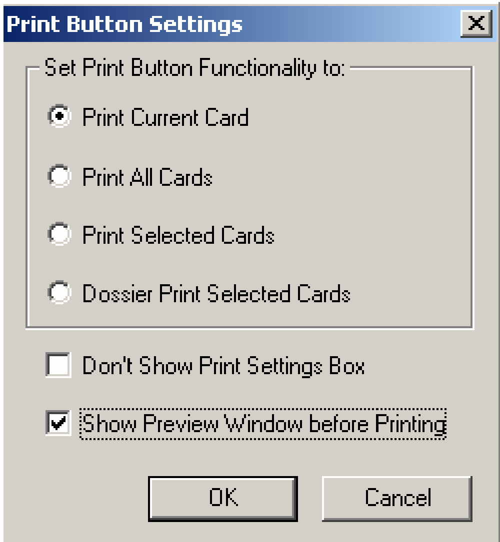
If you define a single duplicate card criterion, such as 'First Name', then Data Entry Center will not allow more than one card to be entered into the template's database with the same first name. If you configure multiple duplicate card criterions, then all must be met before the new card will be forbidden. In the example illustrated by the above screenshot, it will be possible to have multiple card records with the same 'Last Name', 'First Name', and 'Card Number', but a card with duplicate values in all these fields, as well as in the 'Expires' field will be forbidden as a duplicate card.

Auto Crop - When this item is selected, the Edit Image dialog box (described above), which lets the user crop and perform image enhancements, will automatically appear every time a photograph or signature image is loaded or captured in the Data Entry Center. When this item is turned off, the 'Edit Image' dialog will not appear, and the user can launch the 'Edit Image' dialog manually by right clicking on the photograph (or signature) field, and selecting 'Edit Image'.

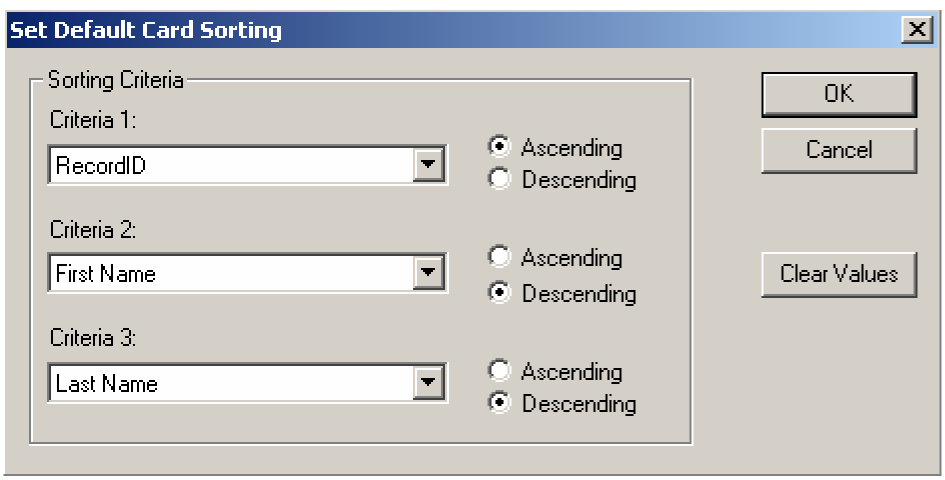
Activate Smart Card Security - If your Asure ID System has had a smart card reader enabled using Admin Center, you may use this item to toggle the use of the Smart Card on and off within Data Entry Center. When enabled, the smart card is required to be in the reader to perform any Data Entry Center operations, and as such the card protects the Asure ID software from unauthorized use.

Set Print Button - Use this item to configure the behavior of the main Print function button on the Data Entry Center screen. When selected, a dialog box (shown below) will appear, and allow you to set the options. By default, the 'Print' function button will print all cards in the current template that have not yet been printed, and will first bring up the 'Printers' dialog, allowing the user to choose a printer and print driver settings for the current job.

Using the 'Set Print Button' function, it can be configured to print 'All Cards', 'Selected Cards', 'Unprinted Cards' or the 'Currently Displayed Card'. Additionally this option can be used to override the automatic appearance of the 'Printers' dialog, by clearing the available option box, and can also be used to have the 'Print Preview' window automatically appear prior to printing.



Set Sorting Order – This option opens up a dialog box (shown below) that can be used to change the order that Data Entry Center lists the card records. By default the first record that was entered is shown first, and the most recent one shown last. This corresponds to using the ‘RecordID’ field as the first criteria in this window.



To configure this item, three drop-down menus are available, each with the same options. The ‘Criteria 1’ drop-down specifies the main sort criteria, and ‘Criteria 2’ is only used to prioritize multiple cards that have matching values for ‘Criteria 1’. Likewise, ‘Criteria 3’ will only be used if the system needs to sort multiple cards that have the same value for both ‘Criteria 1’ and ‘Criteria 2’.

Each drop-down menu lists all of the database fields (user-created as well as internal system fields) available to the template.   For each criterion, simply select the field you would like to use for sorting, and then using the radio buttons, determine if you want the results sorted in ascending or descending order. Press the ‘Clear Values’ button to clear all the menus and start fresh

Quick Find Settings - Select this item to configure the 'hot field' for the 'Quick Find' feature (described previously). You will see a list of all the fields on the template, and will be able to mark one as the 'Quick Find Field' by placing a check mark in the box. Please note that for 'Quick Find', only one field may be used as the 'hot' field. If you would like to perform more complex 'Find' operations (referred to as a Select operation, often called a 'query'), please use the Select function, described in more detail in Data Entry Center Function Buttons.

Show Communication Confirmation - Enables confirmations of all communication with the Asure ID Card Service Bureau when in use.

Rendering Options – Launches the configuration menu for Asure ID’s image rendering options. These options are described in detail under ‘Rendering Options’ in the chapter on Card Design Center details.

Advanced Encoding Settings – Launches the ‘Advanced Encoding Settings’ window where all magstripe and smart card encoder settings are configured.
Complete details on these options are found below in the chapter on ‘Advanced Encoding & Printing Settings’.

Advanced Printer Settings – Launches the magnetic stripe configuration section of the ‘Advanced Encoding Settings’ dialog box. Select this item if you would like to configure magstripe encoding, but will not be setting up smart card reading or encoding.

Complete details on these options are found below in the chapter on ‘Advanced Encoding & Printing Settings’.

Help

The following items are found in the Drop-Down Menu heading '**Help**' located at the top of the Data Entry Center main interface.

Asure ID User's Manual - launches the locally installed copy of this document, the Asure ID User's Manual.

www.AsureID.com - Opens a web browser to Asure ID’s webpage.

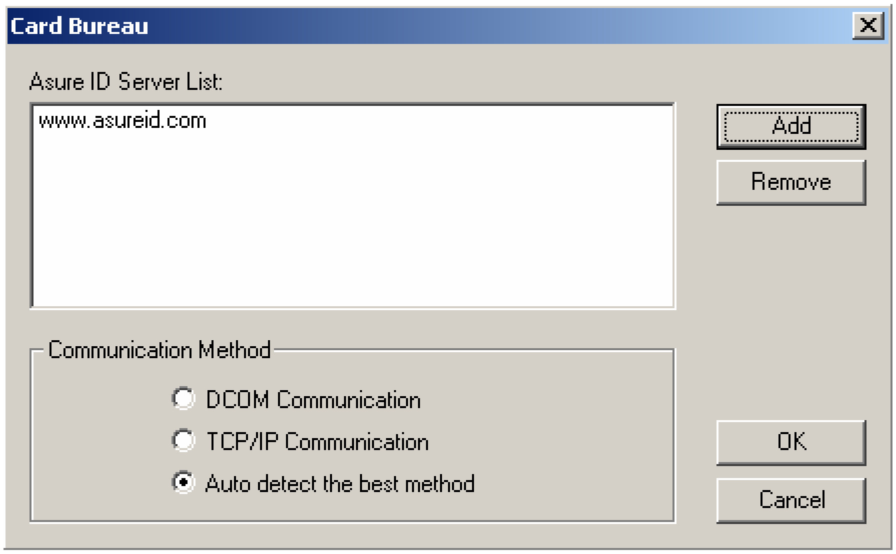
About - Displays about, copyright and version information for your copy of Asure ID.

Appendix A - Using An Asure ID Card Service Bureau

Asure ID allows you to easily use the Internet to securely transfer card data in a 'ready to print' format to an Asure ID Card Service Bureau for primary or backup card production. It's easy and means that you can produce cards no matter what. Let's take a look at the simple steps involved so that you can see how simple and convenient using an Asure ID Card Service Bureau is.

Connecting to a Card Bureau

From within the Asure ID Admin Center you will see a button on the left labeled 'Card Bureau'. If you click on it, you will be able to enter the IP address or URL of the Asure ID Card Service Bureau (HID Partner) that you would like to have produce (print/personalize) your cards.



In the screen that appears, simply click the 'Add' button, type in the IP address (example: 209.146.244.66) or URL (example: www.asureid.com) of your Asure ID Card Service Bureau into the space provided, press the 'OK' button and then press 'Close'.

If you do not have the IP address or URL you will need to contact your Asure ID Card Service Bureau (Asure ID Partner) for this information. If the Asure ID Partner who sold you the Asure ID software does not support this service then you will need to contact Asure ID technical support by either phone, fax, email or through our online customer support to obtain the contact information of the Asure ID Card Service Bureau nearest you.

Web: www.AsureID.com/online_support.htm

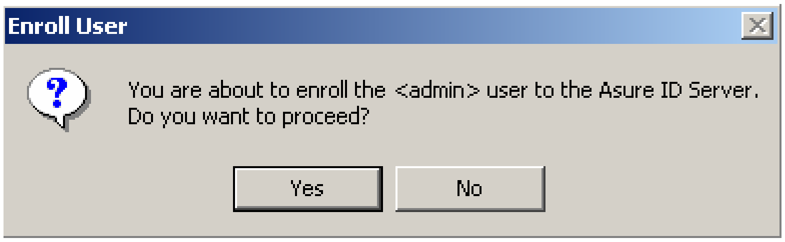
Now that the IP address or URL is properly entered you will need to register (this should not be mistaken with software registration) the user(s) who will be responsible for sending card data, including template information to the Asure ID Card Service Bureau.

Enrolling With An Asure ID Card Service Bureau

It is important to note that any user you enroll must have both the 'send record(s)' and 'send template(s)' privileges in their user profile if they are to be successful in sending card data.

To enroll a user, simply click on that user's name to highlight it, and then press the '**Enroll User**' button on the left hand side of the main 'Admin Center' screen.

A confirmation window will appear confirming the user name you are about to enroll, press 'OK' if you are certain you want to proceed.



You will now see the same 'User Contact Information' dialog box you filled out when you originally added this user. Confirm this is the user account you would like to register and press 'Next' to move to the 'User Contact Information' dialog box.

You will now be presented with the 'User Shipping Information' dialog box and are required to fill in all the fields, giving details about the user being enrolled. This is for the use of the Asure ID Card Service Bureau. After filling in the fields, press ‘Next’ to continue.

To finish the enrollment process you will need to fill out the billing and shipping information associated with the user being enrolled in the '**User Billing Information**' dialog box. When you are done press '**OK**' to enroll.

In a few seconds you will get response on your screen from the Asure ID Card Service Bureau notifying you that the enrollment was successful.

Sending cards to an Asure ID Server Card Service Bureau

When you have finished designing your card template and have used Data Entry Center to add the card records, you may use your Internet connection to send cards to an Asure ID Server based Internet Card Service Bureau for production.

From within the Data Entry Center you will need to select the template to be sent to the Asure ID Card Service Bureau. You will only have to send this template once unless the template is modified, in which case Asure ID will notify the user the next time card data associated with this template is sent.

Select the desired template from the drop-down 'Card Template' menu at the top of the Data Entry Center main screen.

Next, in the main menu bar at the top of the screen click on the 'Communication' drop down menu and select 'Send Template Data'. This will send the card template to the Asure ID Card Service Bureau. Within a few seconds (depending on the template file size and the speed of the Internet connection) you will get a confirmation receipt on the screen, which you may discard or print for later reference.

Now all that is left to do is to send the card data. You have several options when sending card data to the Asure ID Card Service Bureau which are as follows: 'Send Displayed Card', 'Send Selected Cards' or 'Send All Unsent Cards'. You may choose which one you would like to do in one of two ways.

- Click on the 'Send Cards' button on the left hand side of the Data Entry Center screen, which will automatically send all unsent cards to the Asure ID Card Service Bureau.
- Alternatively, you may use the 'Communication' drop down menu (at the top of the screen) and make your selection from the three options presented.

Within a few seconds (depending on the quantity of cards sent and the speed of the Internet connection) you will be presented with a receipt including the name of the user, the date, the number of cards sent, and a card transaction number for further reference. You will also notice a 'sent card' icon appear to the left hand side of any card record that has been successfully sent to an Asure ID Card Service Bureau.

Use this 'pay as you print' card bureau service for backup or primary card production and start to enjoy the benefits of Internet based card production today.

Appendix B - Database Function Details

Asure ID provides many advanced database options and functions to the user. Although these have all been designed with ease of use as a primary goal, many of these features require a deeper discussion. This chapter will examine the various database options available in Asure ID.

The subsections of this chapter will examine installation database options, database import/export, archive/restore, and Live Link functions.

Database Installation Options

Asure ID Exchange provides various options for the system database during the installation. While a complete set of step-by-step instructions are available in the install guides for both applications, this section will discuss the main differences between the various types of choices available.

Asure ID will create either a Microsoft Access or a Microsoft SQL Server (7.0 or 2000) database when it is installed, or it may use a network database created by another installation of Asure ID on the network. The database is created by the installer, and is a specific format and structure designed for use with Asure ID. If a SQL Server support is required, the user must have a SQL Server on their network that they have administrative access to. No third party software support is required for the MS Access option.

Asure ID Exchange has the ability to create its own structured database in any database format that conforms to either the ODBC or ADO open standards. While the possibilities are very large, the majority of users will use MS Access or SQL Server support. The SQL Server option requires that there be a SQL Server on the network with administrative access, however the MS Access option does not require any third party software to be available.

Before beginning the installation of your Asure ID software you must determine which database is best suited for your needs. Both MS Access and network-based RDBM Systems like SQL Server offer unique features, and selecting the right one for your situation is critical to maximizing the benefits of Asure ID. Following is a quick break down of what advantages each database offers.

MS Access - MS Access is the native database that comes with all versions of the Asure ID Family of Products and does not require any other specific application support outside of Asure ID. It is able to house 10,000 records without a noticeable decline in performance, and maxes out at approximately 50,000 records; this is a limitation of the database and not a reflection of the Asure ID software. The actual record count may vary depending on the number of templates, and the size of the photographs in the database. The ‘hard’ limit on a MS Access database is 1.0 GB.

MS Access may also be configured as a local or network database; in addition, Asure ID provides the ability to have multiple users enter records simultaneously. MS Access wasn't conceived with this operation in mind so if network performance is an issue we strongly recommend that users upgrade to SQL Server support. That being said, using Access as a shared database is not a problem if users will not be entering records simultaneously.

MS SQL Server - SQL Server is a very robust and fast multi-threaded, multi-user database that provides a plethora of benefits. It is mostly intended for mission-critical, heavy load production systems. It is able to hold up to 10 Gigabytes (for SQL 7.0 – the SQL 2000 version is unlimited!) of data, which translates into approximately ¾ of a billion records, without any noticeable decline in performance. SQL also supports an unlimited number of connections and won't bog down networks even if the users are connected across the Internet. Overall, SQL is a superior choice for Asure ID users who plan on having many users connected simultaneously or who will be storing large amounts of cards at any one time.

Database Input/Output

Asure ID is equipped with powerful database connectivity tools that can be used to import and export data to and from archives and external data sources. This section provides a complete explanation of the functionality behind the 'Archive', 'Restore', 'Import' and 'Export' functions found under the ‘Database’ menu in Data Entry Center.

Summary

This section provides an overview of the difference between the Import, Export, Archive and Restore operations. More detailed information on each of these topics is available in the following section ‘Details’.

- Archive - This feature is used to create a backup of card records that are currently saved within the Data Entry Center. Archiving will write a Microsoft Access compatible database file that contains all the information from the selected records, and provides an option to delete the card records from Data Entry Center's database. Unlike an Export operation, the data fields contained on your cards will maintain their data type after an Archive operation is completed.

  It is recommended that you perform an Archive operation rather than an Export if you will need to restore the information back into Data Entry Center at a later date.

- Restore - This feature is used to restore records from a database file that was previously created using the Archive feature. Since Archive retains the data types of each field, a Restore operation will import your card records in the identical form that they were originally in. When performing a Restore operation, the template file that the cards belong to must already exist in Data Entry

Center. If it does not, then load the template file into the Card Design Center and save it. If you need to import data from a database source that was not created with Asure ID's Archive feature you must use Import rather than the Restore feature.

- Import - This feature provides the ability to merge data from any ODBC compliant data source into Asure ID's template database. When performing an Import, you will have the option of selecting the template that you want the records to be imported into, or you may choose to create a new template. Select Import when you need to merge information from a data source that was not prepared by Asure ID.
- Export - This feature provides the ability to create an external data file that contains the data from the selected cards. You will have the choice of creating an MS Access database, a text file, an HTML page, or HTML tags. Unlike the Archive function, running an Export operation will convert all the data types on your card template to text for compatibility purposes, and you will not be given the option to delete the records from Data Entry Center. Use Export when you want to create a data file to be used by an application other than Asure ID.

Performance

When working with the import/export tools, the level of performance you will experience is very much determined by the speed of your computer and network. It is important to note that when working with a database in a remote network folder, the speed of the import and export operations will be significantly slower then when working with a local database.

The following statistics were taken on a Pentium II 600mhz computer with 128mb RAM, using a local Access database. This should give you a rough idea of what levels of performance to expect when working with the database.

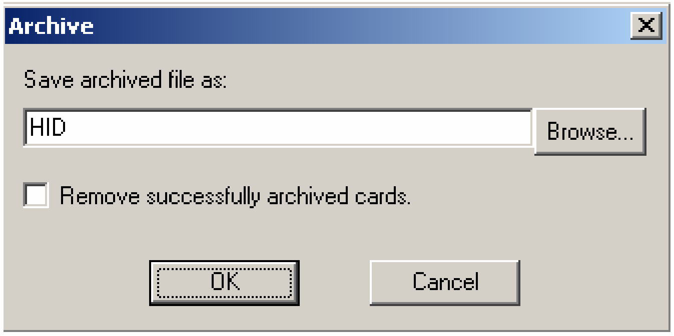
Import 2560 Records - 5 Minutes
Export 5120 Records - 1 Minute
Import 5120 Records - 10 Minutes
Export 10240 Records- 1.2 Minutes
Import 10240 Records - 20 Minutes

As you can see, the amount of time it takes to perform these operations scales evenly as you increase the number of records in use.

Details

Archive

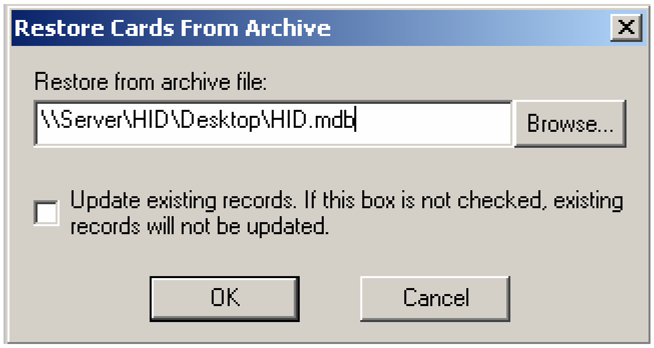
To archive the selected cards, select 'Database' and then one of the Archive options from the Data Entry Center's dropdown menu bar. You will be presented with an Archive dialog asking for the name of the file you would like to create. There is also a Browse button on the dialog box that can be used to select a location for the new file to be written to.



After the Archive operation has been successfully completed, you will see a summary of how many cards were archived, and then be given the option to delete the records from Data Entry Center's database. Please note that doing so will remove the records completely from within the Data Entry Center. Once removed, these cards can only be brought back by running a Restore operation, and selecting the file that was created when you performed the Archive.

Restore

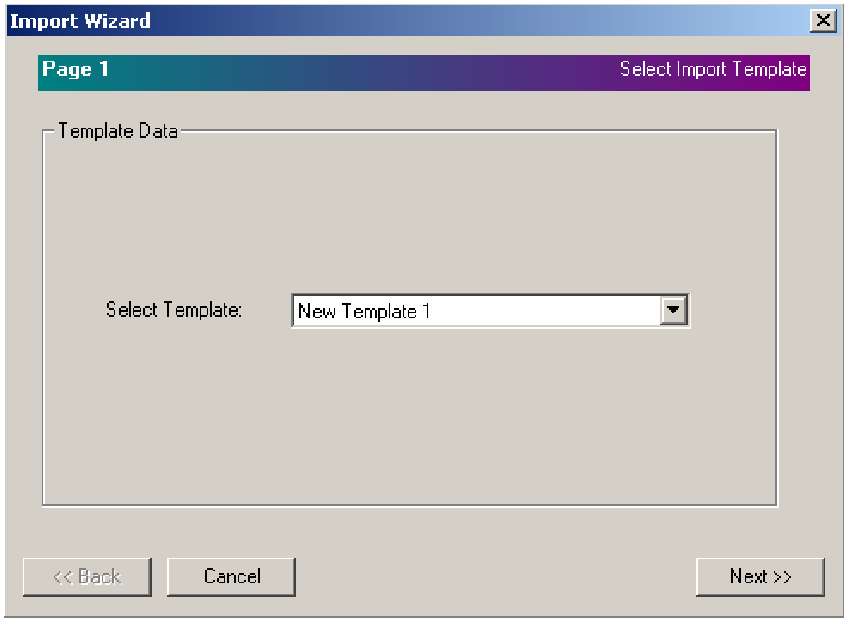
This is the reverse of the Archive operation, and can only be performed using files that were created with the Archive function described above. Perform a Restore operation by selecting 'Database' and then 'Restore Cards From Archive' from the drop-down menu bar at the top of the Data Entry Center screen. You will be presented with a Restore dialog box asking for the location and name of the file that contains the archive. There is also a Browse button that can be used to manually find the path to the file.



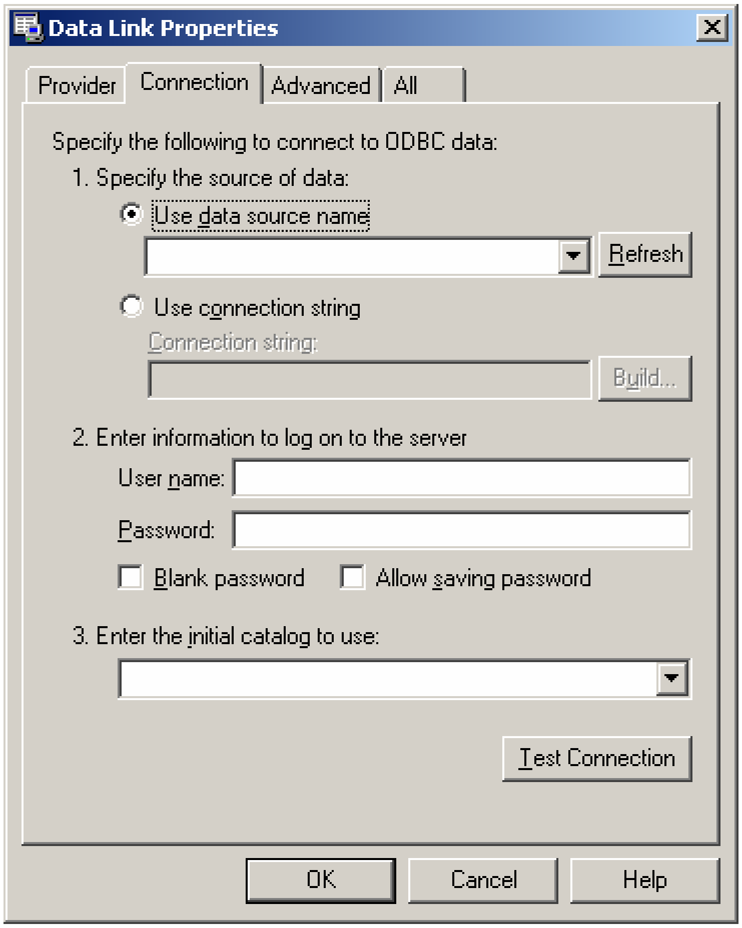
After the Restore operation has been successfully completed, you will be presented with a summary of how many card records were restored. Please note that you must know which Asure ID template files various archives are associated with. These templates must be available in Data Entry Center before performing the Restore function. Restore operations will always move card records back into the same template that they originally came from. If the template file is not available in the Data Entry Center (and you have a previously exported or backed-up copy), you can initialize it into the database by going into Card Design Center, loading the template file, and then re-saving it.

Import

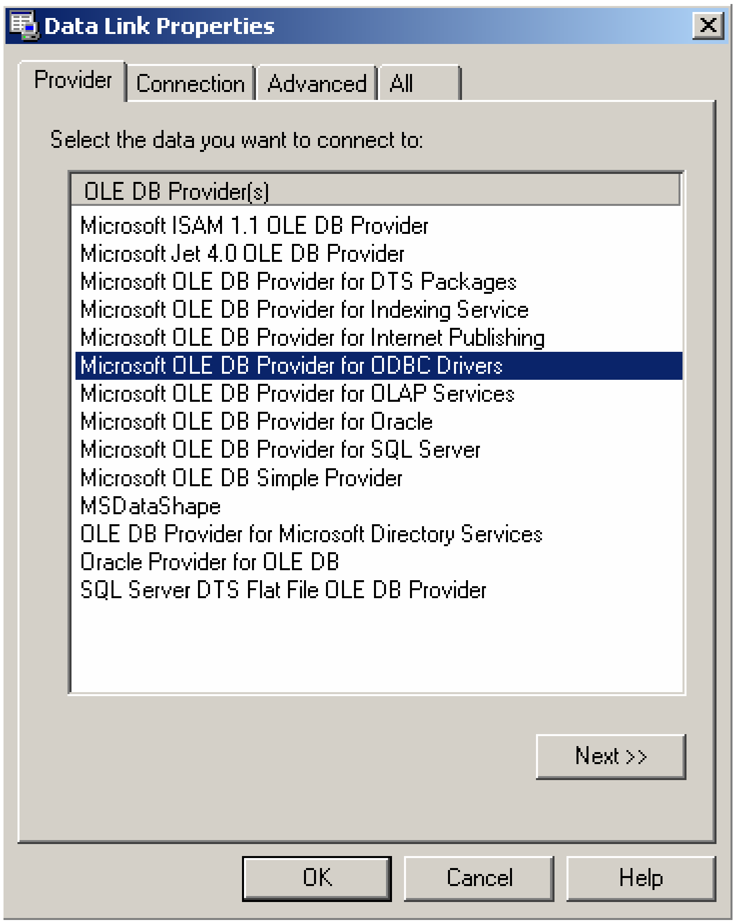
To perform an Import, select 'Database' and then 'Import Wizard' from the drop-down menu bar at the top of the Data Entry Center screen. The Import Wizard will open, and guide you through the process:



First, select which template (choose from the available templates in the drop-down menu) you would like to import the data into. After you have made your selection, press the 'Next' button. This will bring up the second page of the Import Wizard, which is where you select the type of data source you will be importing from.



A “Data Link Properties” window will appear. We will use this window to accomplish two essential tasks – selecting the database, and providing authentication information.
First, we will want to select the type of database we will work with. Select the “Provider” tab at the top of the window, and a list of database drivers will appear listed under “OLE DB Provider(s)”.



The list may be different from one computer to the next, as the entries are all the ADO data source types that are installed and registered with your computer. If there is not an entry for the database type you want to work with, you will need to either install a registered ADO driver from your database vendor, or configure a functioning ODBC connection to the database, and then restart the Import Wizard.

If the database type you wish to link to is displayed, select it and then press the “Next” button on the lower left to continue. If you wish to use an existing ODBC connection to your database instead of a registered ADO driver, select “Microsoft OLE DB Provider for ODBC Drivers”.

SQL Server and MS Access are some of the most commonly used databases. If you would like to use SQL Server, select “Microsoft OLE DB Provider for SQL Server”, or if you wish to use a Microsoft Access database, select “Microsoft Jet 4.0 OLE DB Provider.

After selecting the appropriate data source, press “Next” to select the database instance (path or source name, depending on selected driver) and authentication information. The page that appears will be somewhat different depending on the database driver you have selected, and will show options appropriate to that data type.

If you selected a SQL Server driver, you will need to enter the name of the Server (hostname or IP address) in the ‘1’ box, as well entering the username and password for the ‘sa’ (or equivalent) account in the ‘2’ box, and finally use the drop-down menu under the ‘3’ item to select the database instance within the SQL Server that you will link to.

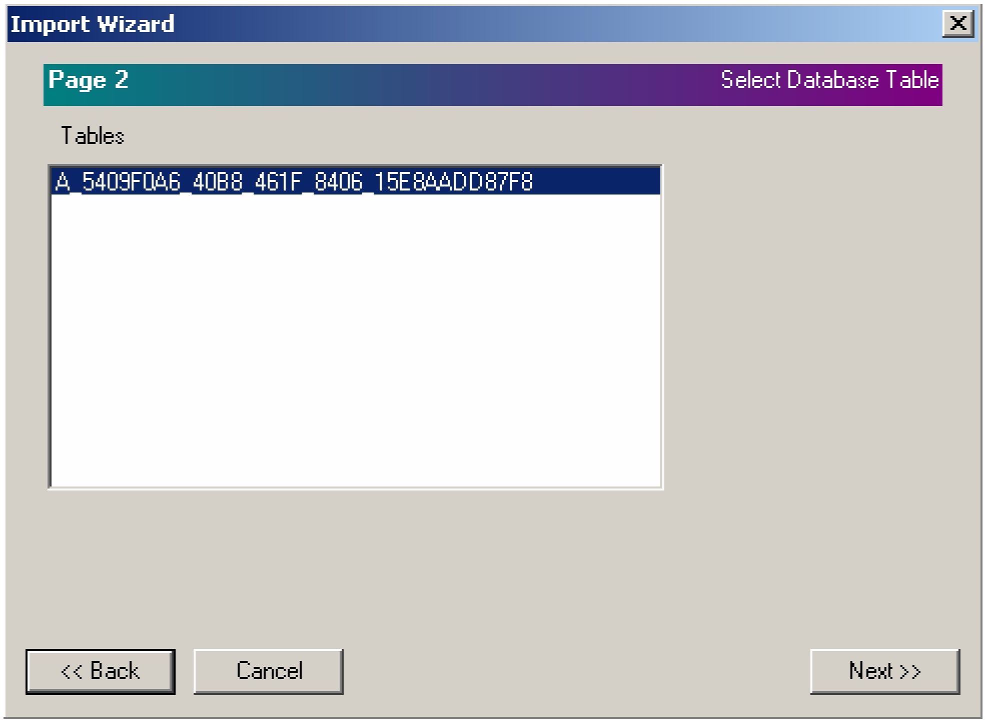
If you have selected the ADO Provider for ODBC Connections, under “Use Data Source Name” there will be a drop-down menu showing all available ODBC connections, and you may select the one that is configured for the database you wish to link to.

If you have chosen the Microsoft Jet driver, there will be a “..” button beside the ‘1’ box that can be used to browse to select an existing Microsoft Access database on your computer or network.

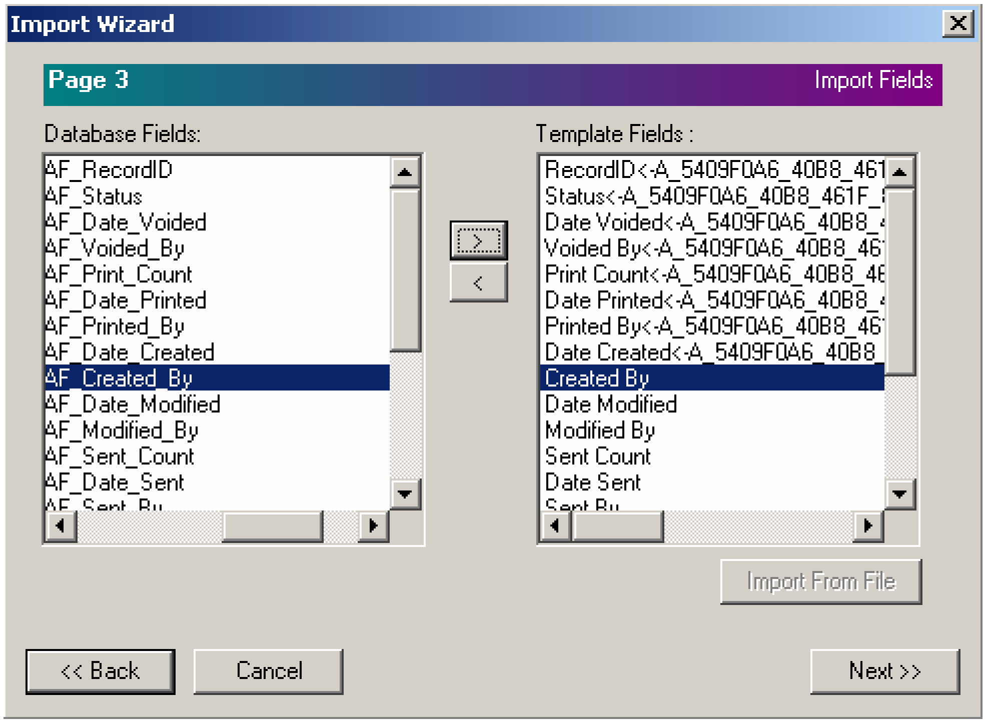
Whatever database driver you have selected, you will need to select the database itself (or Server and database for a SQL Server, as described above), as well as any authentication information that may be required by the database. If your database does not use authentication, check the ‘Blank Password’ box.

When you have made the appropriate database and authentication settings, press the “Test Connection” button to test the settings. If you see a message stating that the database connectivity tests were successful, you have made the correct settings, and can press “OK” to save the database configuration and close the window – you have now successfully selected and authenticated your database for Import Wizard operations, and may move on to the second step – mapping the fields.

If the database connectivity test fails, you will need to check the settings and ensure that you have configured the database correctly. The “Advanced” and “All Fields” tabs of the window may be used to access all configuration options specific to the selected Data Source, and may be used by system administrators and advanced users to troubleshoot connection problems resulting from the choices made on the standard options presented by this window.



Page two of the Import Wizard will now appear, listing the tables that have been detected as available in the selected data source file. Note that you can only select one table with each Import operation. Choose the table that contains the data you wish to import, and press 'Next'.

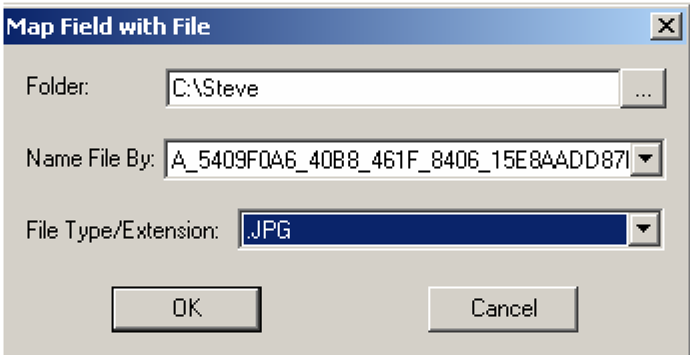


Next page 3 of the Import Wizard will appear. This contains two columns - the left-hand side displays all data fields in the selected table of the chosen data source, and the right-hand side shows all fields on the card template. Define a relationship by choosing which fields from the data source should relate to which field in the template by clicking the field on each side (to select), and then pressing the '>' button. Please note that the data type (i.e. number, text, date) must be the same for each of the two fields you are associating.

To view information about each field, including data type, right-click on the field's name and select 'Properties'. To undo a relationship that has been defined in this dialog box, choose the field in the right-hand side and then press the '<' button.

This page is also used to setup the import of photo and signature images. In the right-hand column, you will see a ‘Photo 1’ field if you have a photo on your card (and a ‘Photo 2’ field if you have a second photo, and so on), and a ‘Signature 1’ field if you have a signature. You may link these to database fields from your source database, or you may import images from a folder of standalone files.

If you would like to import the Photo or Signature images from standalone files, select the item on the right-hand ‘Template Fields’ list without first selecting an entry from the ‘Database Fields’ column on the left. When you do so, an ‘Import From File’ button will appear below the ‘Template Fields’ list. Press this button to setup the image import options.



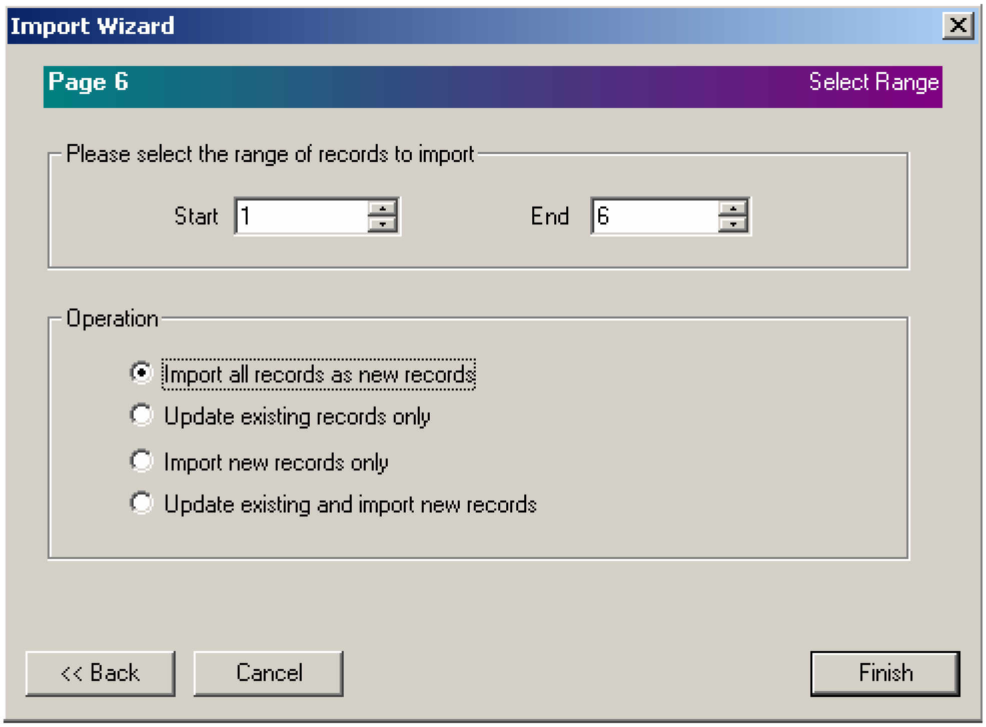
On the first line, click the '…' button to browse to the folder that contains your image files. When you have selected it, press 'OK' to return to the image import options screen.

Next, click on the 'Name File By:' drop-down menu. This lists all of the database fields from your import source. The Import Wizard needs to know what photo file corresponds with a given database record, so the photos must be named according to one of the unique database fields in order for the import to be successful. Select the database field which provides the naming convention for your image files from this menu.

Finally, select the image type to import from the final menu. When you are satisfied with your selections, press the 'OK' button to return to the field-mapping page of the Import Wizard.

When you are satisfied with all of your field assignments in the Import Wizard mapping page, press the 'Next' button to continue.

The final page of the Import Wizard will now appear, asking you to specify the range of records that you wish to import, and how duplicates should be handled.



First, select the range of records to import using the ‘Start’ and ‘End’ value counters. By default, you will see the largest number possible - this is based on the total number of entries in the data source.

Next, choose how the Import Wizard should handle duplicate records. There are four options:

- Import All Records As New Records – This option will simply import all the selected records from the external data source, adding them all to the current database without monitoring for duplicates.
- Update Existing Records Only – This option will compare the value of each incoming record to the ‘Key Field’ (set in the Card Design Center for the current template) of your template. A record will only be imported if it matches the Key Field value of an existing record. In this case, the existing record will be overwritten with the new values in the database being imported.
- Import New Records Only - This option will compare the value of each incoming record to the ‘Key Field’ (set in the Card Design Center for the current template) of your template. A record will only be imported if it does not match the Key Field value of an existing record.
- Update Existing and Import New Records - This option will compare the value of each incoming record to the ‘Key Field’ (set in the Card Design Center for the current template) of your template. All records will be imported, however if the Key Field value matches an existing card record, the existing record will be overwritten with the new values in the database being

imported. If the key field does not match an existing record, the values will be imported as a new record for your template.

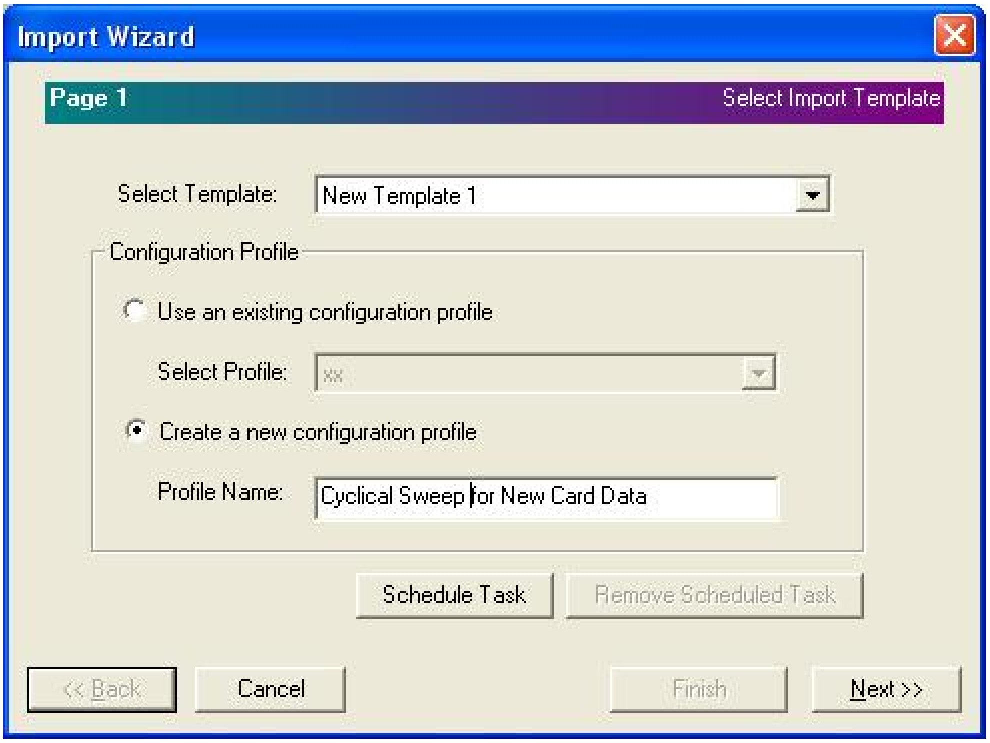
When you have made the desired settings, press the 'Finish' button to perform the import. You will see a progress indicator, followed by a summary of how many cards were imported. Your imported records will appear in the card record database of the template you selected in Page 1 of the Import Wizard.

Schedule an Import

As described in the previous section, importing a database provides the ability to merge data from any ODBC compliant data source into Asure ID's template database. If importing is to be done on a cyclical basis you can schedule your imports to occur when you require them.

This section provides the steps to take to schedule your import.

1. In the Data Entry Center (DEC) select Database from the menu bar and click on the Import Wizard selection. The following screen displays:



2. From the drop down box at the top of the screen select the template you wish to schedule an import for.

3. In the Configuration Profile box, highlight the button to select a profile.

4. Click the radio button beside “Use an existing configuration profile”, if you have a profile already. Once you click on the radio button you will be able to select the profile from a drop down box.

5. Click the radio button beside “Create a new configuration profile”, if you want to set up a new profile. Enter the name of your profile in the “Profile Name” box. **Hint:** Make it descriptive enough in case you need to find it quickly at a later date.

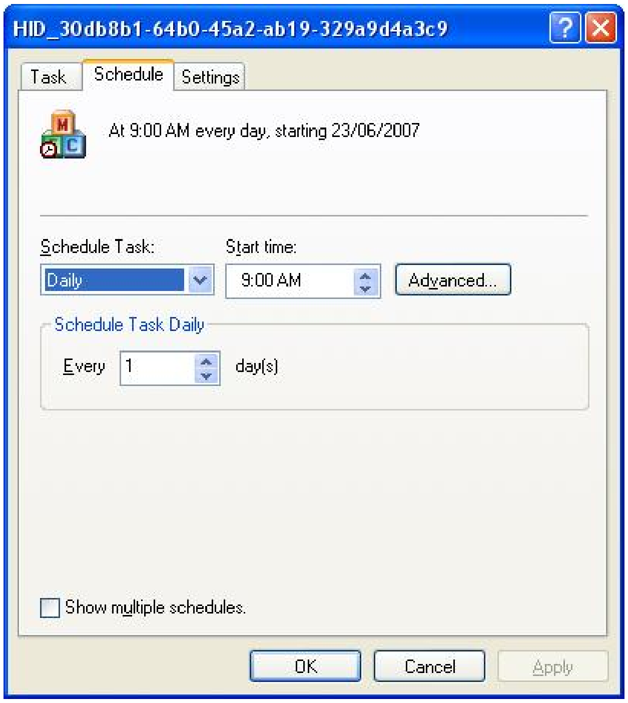
6. Click the “Schedule Task” button to go to the next step in the scheduling process.
   The “Task” tab displays.

For this tab the following Asure ID information applies:

Field	Description
Run	This dialog box displays the profile information required for your scheduled task. It describes the task to take place to import records from one place (e.g., a CSV file) to your Asure ID database.
Run as…	This field reflects the name of the entity (e.g., admin group) or person (e.g., Jane Doe) setting up the scheduled task. If this is not the person or entity that should be reflected in the field, you can change the field information.
Set password…	When you click OK to set up your task you will be prompted to input the password information of the entity or person reflected in the "Run as:" field.

Note: For information about any of the fields on the screen, click the question mark in the upper right hand corner of the screen and then click the field for which you required more information.

7. Click the "Schedule Task" tab.

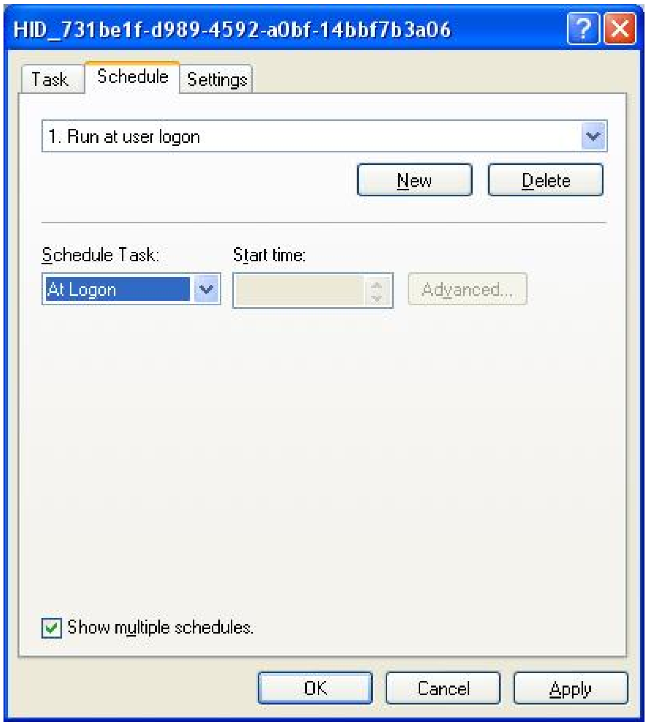


For this tab the following Asure ID information applies:

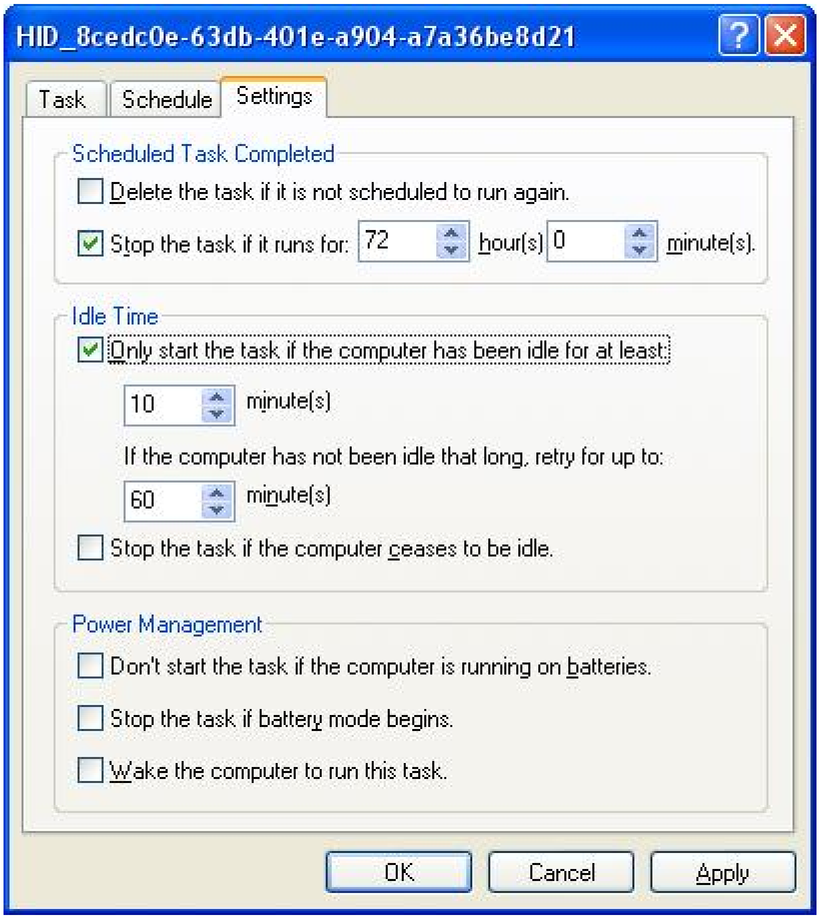
Field	Description
Schedule Task	Choose the frequency of the task (e.g., Daily, Weekly, Monthly)
Start Time	This is a twenty-four hour clock. Select the start time for your task.
Schedule Task Daily	This field changes according to the value of the Schedule Task field. Complete this field according to how you would like to run your task. For another example of the Schedule Task when the At Logon value is selected in the Schedule Task field see below. ***

Note: For information about any of the fields on the screen, click the question mark in the upper right hand corner of the screen and then click the field for which you required more information.

*** When you select "At Logon" the following screen displays:



8. Click the “Settings” Tab.

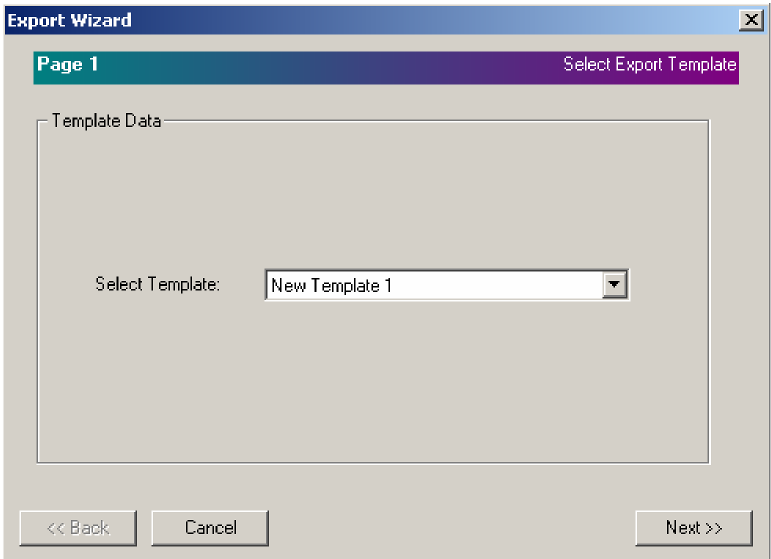


Complete any fields that apply to your task.

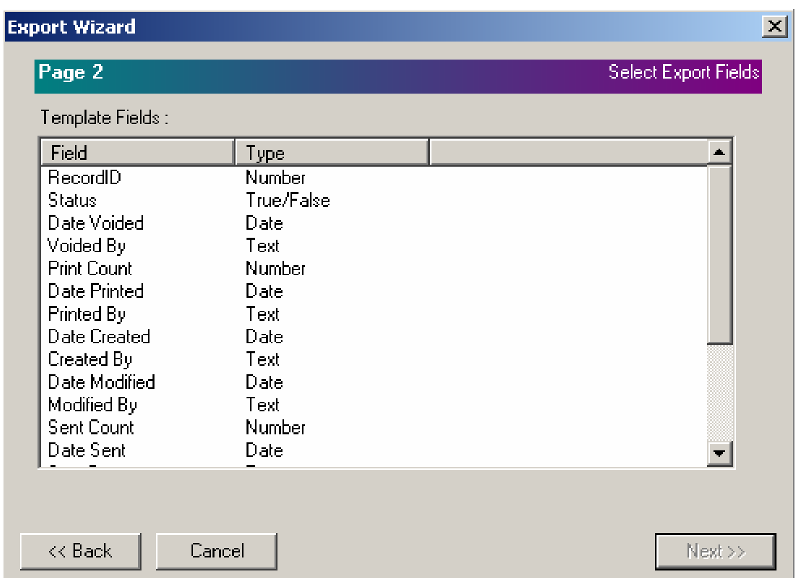
Note: For information about any of the fields on the screen, click the question mark in the upper right hand corner of the screen and then click the field for which you required more information.

Export

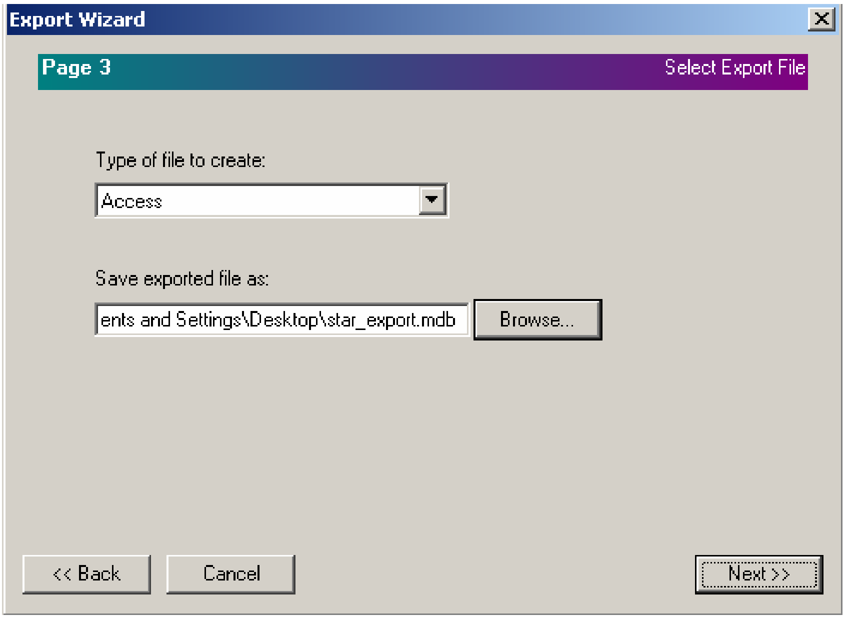
To perform an Export, select 'Database' and 'Export Wizard' from the drop-down menu bar at the top of the Data Entry Center screen. The Export Wizard will open, and guide you through the process:



First, select the template you wish to export data from. All templates available in Data Entry Center will be displayed on the drop-down list. When you are satisfied with your selection, press the 'Next' button.

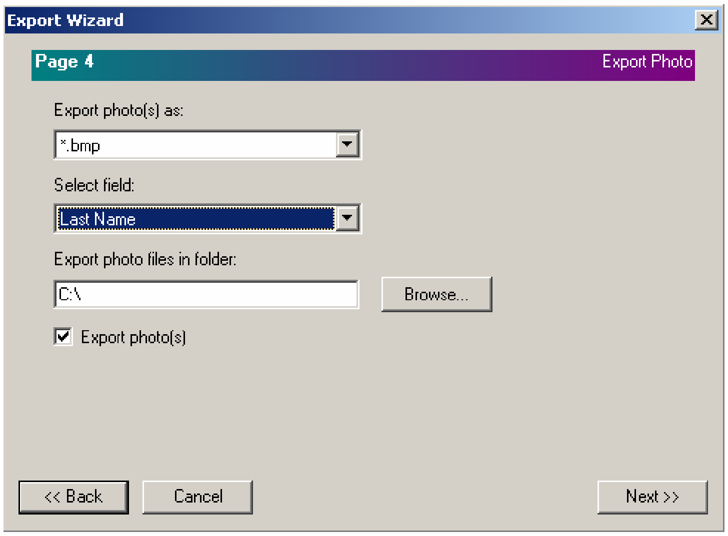


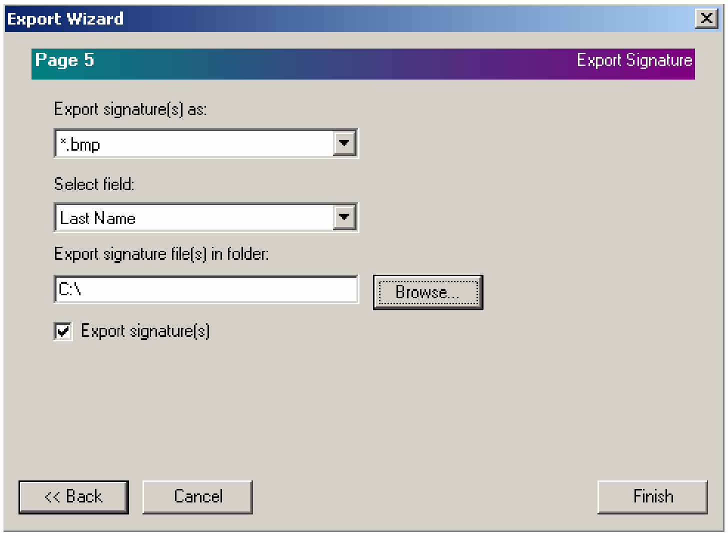
You will then see a listing of all the fields contained in the chosen template. Select the fields you wish to export by holding down the <CTRL> key and clicking the available fields. When you are satisfied with your selection press the 'Next' button.



You will be prompted to select the file type and location of the file that will be exported. Choose the file type (Access, HTML, text) from the dropdown menu, and press the 'Browse' button to select your location. Please note that in the 'Browse' window that appears you will need to select the file type again in the 'Save As...'drop-down menu. When you have made your selection, press the 'Finish' button to perform the export.

After the Export has completed you will be presented with a summary of how many records were exported. Unlike an Archive operation, Export will convert all data types to text and will not provide the option of deleting the records from within the Data Entry Center. After selecting the file type and location to save as, you will be prompted for a location to save first photo, and then signature images (shown below). The image export option is only available during an Export operation, and not during Archives, where it is handled automatically.





Database Input/Output Notes

The following information is important to keep in mind when performing database input/output operations with Asure ID:

- Text files prepared with the Export Wizard do not have 'headers' that define field names. These can be easily added, however, by editing the text file and adding a line to the very top of the file in the format: <fieldname>, <fieldname2>, <fieldname3>, etc. This line must be written in exactly this format, with the quotation marks and commas. Note that etc. should be replaced with the desired field names.

- If you select an existing file when performing an Archive or an Export Wizard operation it will be completely overwritten with the new information, erasing what was previously contained within the file.
- While using Import Wizard and Restore functions, it is possible to merge cards into Data Entry Center that will 'break' the duplicate card criteria (if a duplicate card criterion has been defined for the selected template). This will happen without any messages or warnings from the Data Entry Center, so please exercise caution when duplicate cards are a consideration.
- When a template is configured to use the Live Link functionality, the Import, Export, Archive and Restore features are disabled.

Live Link

Asure ID Exchange includes the brand new Live Link feature, designed to let users work with existing third party databases instead of the standard Asure ID database.
Some situations where Live Link would prove useful include:

- Any organization that already has their cardholder info stored in an existing database, and wants to work with this existing information instead of re-entering it. This database may have been a custom creation for the organization, or it could have been created by an Access Control or Human Resources software application.
- Any organization that wants to 'share' the cardholder data between multiple different applications, without having to add new records to one application and then manually updating the other one.
- Any organization that wants to use different database types other than the native Asure ID MS Access or MS SQL database.

The Live Link feature is intended for integrators and advanced users with some database experience, and allows for Asure ID to be configured to no longer read and write from its own native database, and instead be directed to an external database to read existing records as well as storing new records.

All Live Link configurations are 'per template', that is, only affect a single template within Asure ID. When a Live Link configuration is established for a given template, other templates will still read and write from Asure ID's default database, unless they have also been given their own Live Link configuration. A user may create as many Live Link configurations as they would like – every template can have its own unique database relationship. In fact, within a given template, multiple Live Link configurations may be created and saved, and the user can switch between them at will. Please note that for a given template, each Live Link configuration represents a unique set of cardholder records. If you save multiple Live Link configurations to a single template, switching between them is similar to switching templates – each configuration will bring up a set of records that is unique to the chosen Live Link configuration and not necessarily related to the data stored in other Live Link configurations.

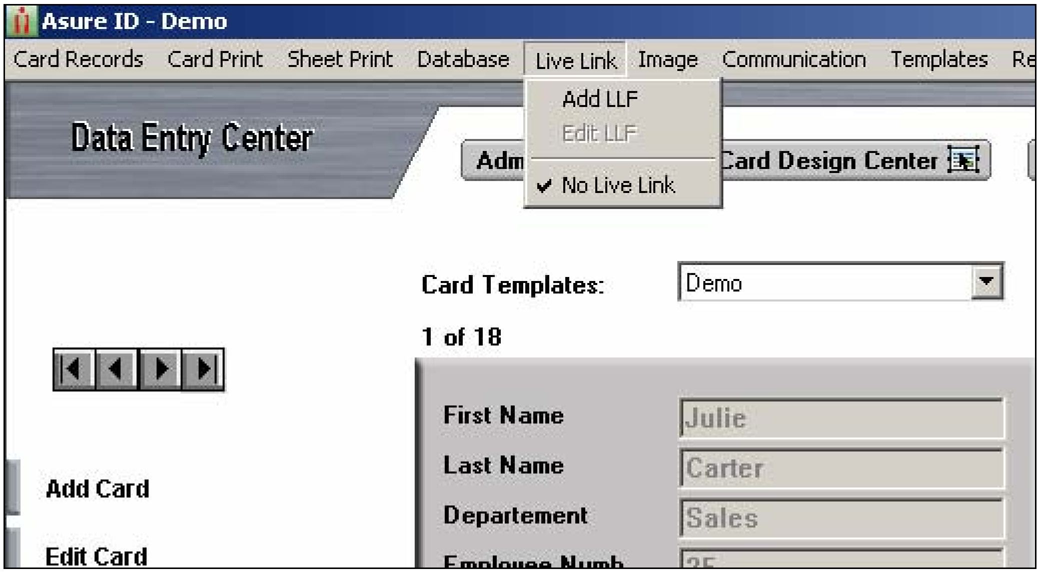
Finally, when establishing a new Live Link configuration to a given template, no records are discarded from the default Asure ID database, or the other Live Link configurations. Within a given template, a user may have a set of records stored within Asure ID's own database (the 'No Live Link' option), as well as separate and unrelated sets of records stored in external databases and accessed through each saved Live Link configuration. The user may switch between these record sets at will.

This Quick Start guide for Live Link will explain the procedure to establish a new Live Link configuration, and how to work with multiple Live Link settings for a given template.
There are two main steps to creating a new Live Link configuration – selecting the database and mapping the template fields. We'll take a closer look at each of these steps as we set up a basic Live Link configuration.

Selecting a Database

To begin setting up a Live Link configuration, launch Data Entry Center, and select the template that you want to build a Live Link configuration for. All new Asure ID templates are by default connected to the native Asure ID database, however after we have created and saved a Live Link configuration, we will be able to switch the template's 'data path' from the native Asure ID database to the external Live Link database(s).

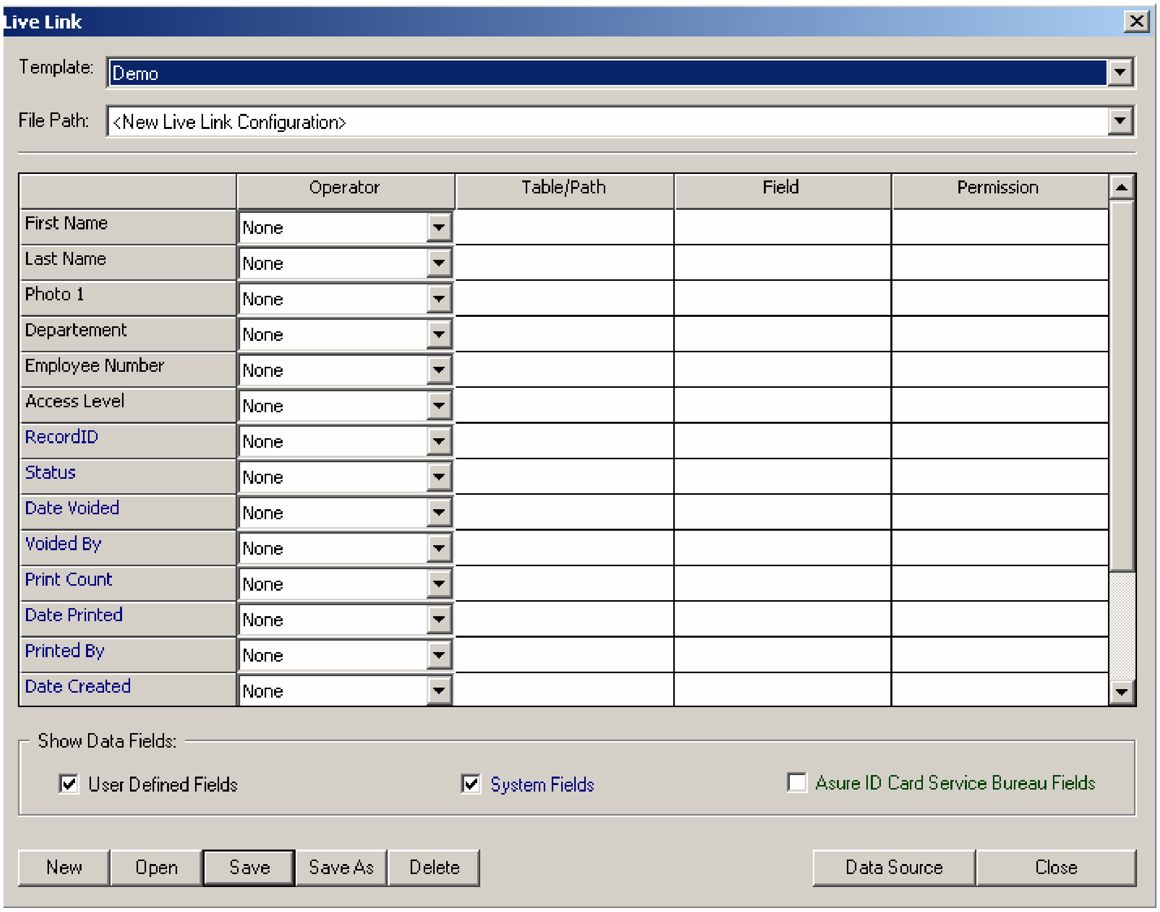
After selecting the template you want to work with, click on the "Live Link" drop down menu at the top of the main Data Entry Center screen.



You will see three items on the menu – Choose "Add LLF" to create a new Live Link File, or "Edit LLF" to modify an existing Live Link File. The "No Live Link" item (which is checked by default when there is no active Live Link File) is used both to denote when there is no active Live Link File, as well as an option that can be selected to ‘switch’ the card record set from an active Live Link File back to the original Asure ID database.

Please note your Asure ID account must have been granted permissions to use the Live Link tool in order to access the items on this menu. If you do not have the appropriate rights, ask your Asure ID administrator to edit your account in Asure ID’s Admin Center so that you will have the appropriate permissions.

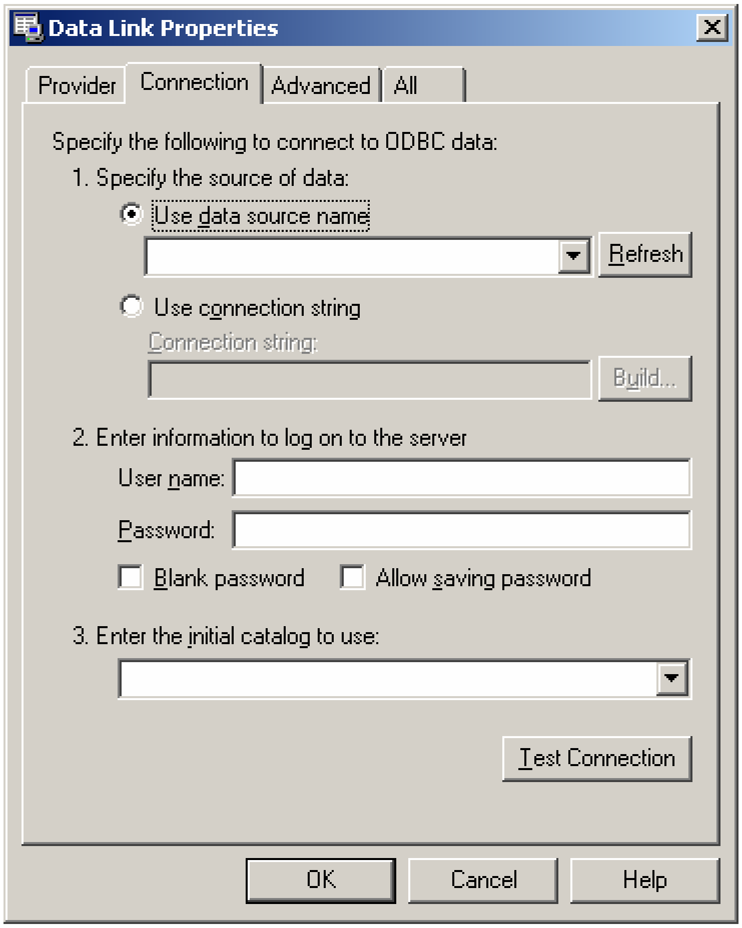
To get started, we will want to add a new Live Link File, so select “Add LFF” from the menu, and the Live Link configuration tool will appear.



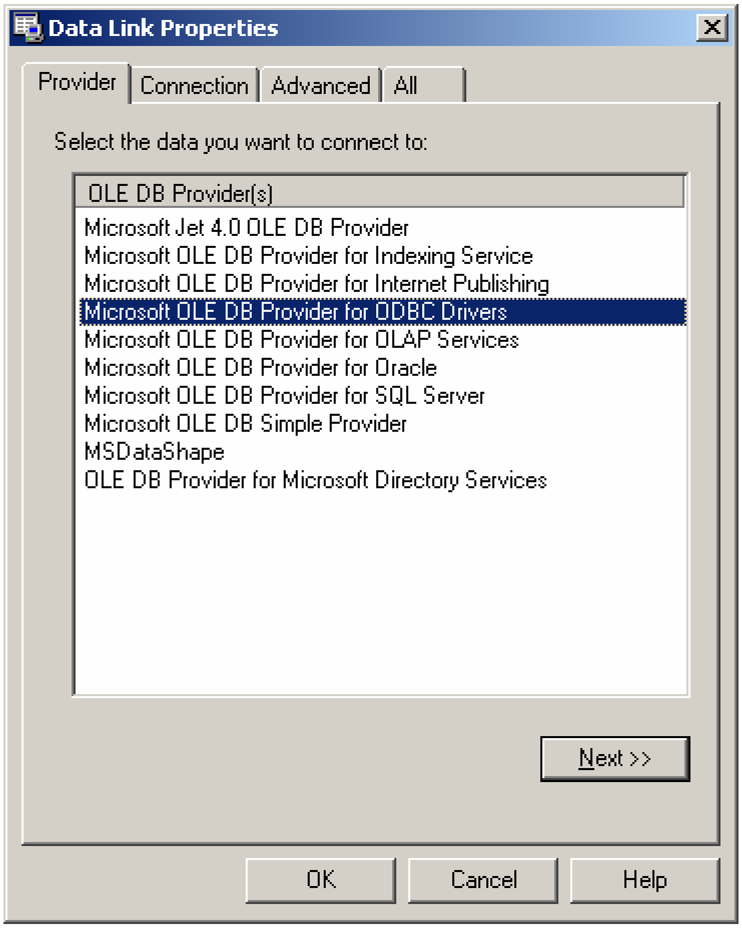
The Live Link configuration tool includes drop-down menus to select the template that the Live Link File will apply to, as well as the path to save the Live Link configuration file to. The main section of the window lists all of the fields that are included with the template, and after configuration, this area will also list the external database mapping that is assigned to each field. There are three check boxes that allow the user to 'mask' certain field types that they may not want to configure with Live Link, and finally there are some buttons at the bottom of the window that are used to load, save, delete and create Live Link Files.

Since we have launched the tool by selecting "Add LLF", we are by default working with a new configuration, so all of the mapping fields are empty. When starting a new Live Link configuration, the first thing that we must do is to select the database we want to work with. Press the "Data Source" button on the lower right of the window to configure the database selection.

A "Data Link Properties" window (shown below) will appear. We will use this window to accomplish two essential tasks – selecting the database, and providing authentication information.



First, we will want to select the type of database we will work with. Select the “Provider” tab at the top of the window, and a list of database drivers will appear listed under “OLE DB Provider(s)”.



The list may be different from one computer to the next, as the entries are all the ADO data source types that are installed and registered with your computer. If there is not an entry for the database type you want to work with, you will need to either install a registered ADO driver from your database vendor, or configure a functioning ODBC connection to the database, and then restart the Live Link configuration tool.

If the database type you wish to link to is displayed, select it and then press the “Next” button on the lower left to continue. If you wish to use an existing ODBC connection to your database instead of a registered ADO driver, select “Microsoft OLE DB Provider for ODBC Drivers”.

SQL Server and MS Access are some of the most commonly used databases. If you would like to use SQL Server, select “Microsoft OLE DB Provider for SQL Server”, or if you wish to use a Microsoft Access database, select “Microsoft Jet 4.0 OLE DB Provider”.

After selecting the appropriate data source, press "Next" to setup the database instance (path or source name, depending on selected driver) and authentication information. The page that appears will be somewhat different depending on the database driver you have selected, and will show options appropriate to that data type.
If you selected a SQL Server driver, you will need to enter the name of the Server (hostname or IP address) in the '1' box, as well entering the username and password for the 'sa' (or equivalent) account in the '2' box, and finally use the drop-down menu under the '3' item to select the database instance within the SQL Server that you will link to.

If you have selected the ADO Provider for ODBC Connections, under "Use Data Source Name" there will be a drop-down menu showing all available ODBC connections, and you may select the one that is configured for the database you wish to link to.

If you have chosen the Microsoft Jet driver, there will be a ".." button beside the '1' box that can be used to browse to select an existing Microsoft Access database on your computer or network.

Whatever database driver you have selected, you will need to select the database itself (or Server and database for a SQL Server, as described above), as well as any authentication information that may be required by the database. If your database does not use authentication, check the 'Blank Password' box.

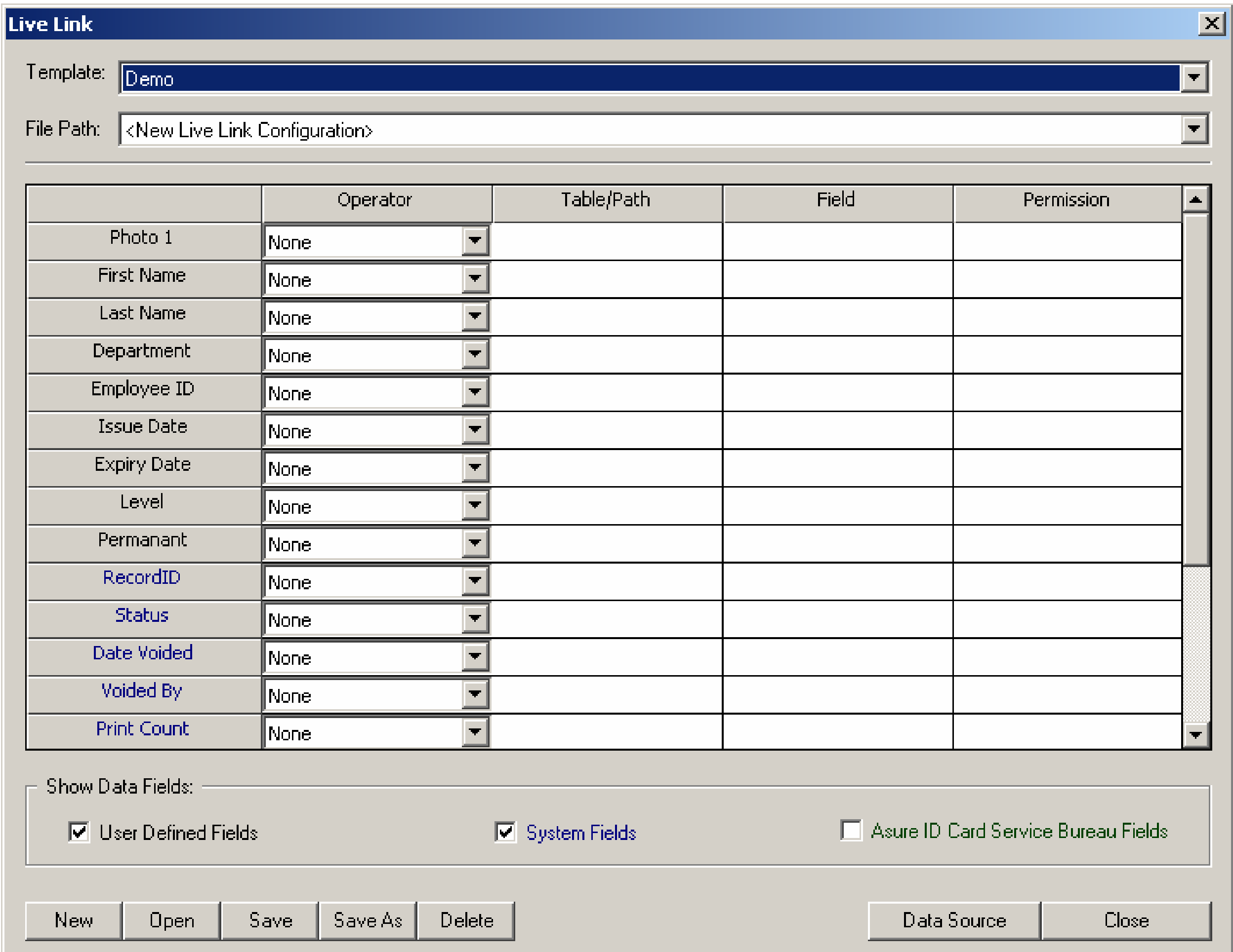
When supplying authentication information in this window, please note that Asure ID's ability to access tables, fields, as well as read and write from the database will be governed by the permissions granted to the user name that is supplied for authentication. If you are using a 'read only' account, Asure ID will be unable to write new records into the linked database. We recommend that you use an Administrator account with full database access when configuring the authentication information. After entering in the correct authentication information, check the "Allow Saving Password" box before you continue.

When you have made the appropriate database and authentication settings, press the "Test Connection" button to test the settings. If you see a message stating that the database connectivity tests were successful, you have made the correct settings, and can press "OK" to save the database configuration and close the window – you have now successfully selected and authenticated your database for Live Link operations, and may move on to the second step – mapping the fields.

If the database connectivity test fails, you will need to check the settings and ensure that you have configured the database correctly. The "Advanced" and "All Fields" tabs of the window may be used to access all configuration options specific to the selected Data Source, and may be used by system administrators and advanced users to troubleshoot connection problems resulting from the choices made on the standard options presented by this window.

Mapping the Fields

Now that we have successfully chosen, authenticated and tested the database path, we need to link the template fields to the external database before our Live Link configuration is complete and can be applied. After testing the data source connection and then pressing "OK" in the "Data Link Properties" window, we will be brought back to the main Live Link interface.



There are three types of fields contained in any Asure ID template – 'User Defined Fields', 'System Fields' and 'Asure ID Card Service Bureau Fields', and check boxes at the bottom of the Live Link configuration window allow for some or all of these categories to be displayed or hidden.

User Defined Fields are all of the fields that have been added to the template in Card Design Center when it was designed. Typically each of these will be linked to the external database – if one of these fields is not linked, it will not display or store any data within Data Entry Center when the Live Link File is activated.

System Fields are Asure ID's internal administration and tracking fields that are used for every template. Fields such as 'Status', 'Date Voided', 'Date Printed' etc. are included in this group. If you wish to be able to use Asure ID features such as Voiding Cards, Printed Card Reports, etc., you will need to link these fields into your selected database. If you do not link them, these features of Asure ID will not be available. You may need to create some new fields in your external database to store these values.

IMPORTANT NOTE ON PRIMARY KEYS

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*One of the **System Fields** is very important, and requires further discussion for anyone working with Live Link configurations. The "**RecordID**" field is the default Primary Key (database index) field for all Asure ID templates and records. A user in Card Design Center may override this primary key (for a given template) by marking one of the User Defined Fields as a primary key. If a new primary key is established on one of the User Defined Fields, the user may safely ignore the "RecordID" System Field; however they **must** make sure they have linked their User Defined primary key field to the primary key (unique) field of the external database. If the template does not supply a User Defined primary key, the **RecordID** System Field **must** be linked to a unique key field within the external database. This field must contain sequential, unique values. Failure to link the primary key will prevent the Live Link configuration from functioning.*

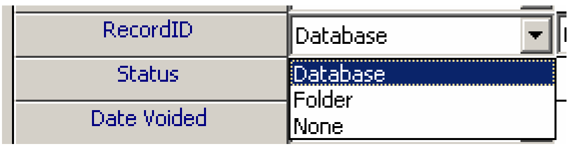
***Tip:** If you do not have a suitable field in the database to act as a primary key, it is recommended that you simply add an 'AutoNum' field to the table you are trying to link to, and then use this as the primary key to link to the **RecordID** system field.*

Asure ID Card Service Bureau Fields are internal administration and tracking fields that are only used if the user will be transmitting cards from Asure ID to an external Asure ID Server Internet-based Card Service Bureau for printing. If you are using an external Card Service Bureau with Asure ID Exchange, you must also link these fields into appropriate space in your external database. If you are not using a Card Service Bureau, you may safely ignore these fields.

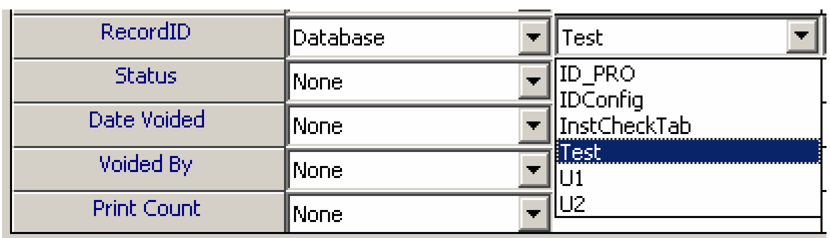
Now that we have examined the different field types, let's perform the linking. Start by checking **User Defined Fields** as well as **System Fields**, but not **Asure ID Service Bureau Fields**.

As discussed above, it is extremely important to ensure that the primary key is linked before we apply a Live Link configuration, so we should start with this field. If your card template has a custom primary key field set by the designer, locate this field in the list, otherwise, begin with the **RecordID** field.

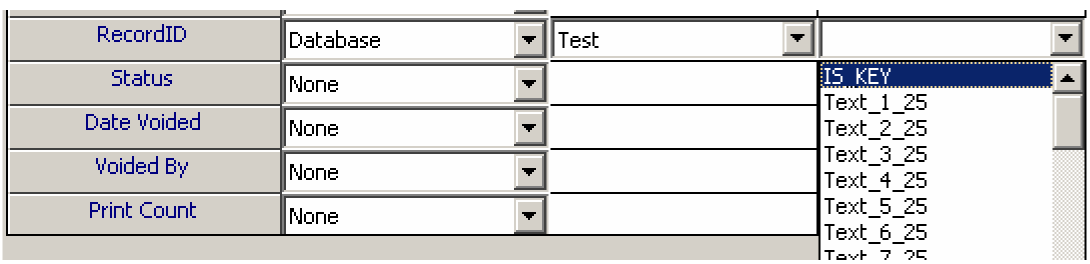
Beside each field name in the Live Link window, there is an **Operator** column with a drop-down menu. The items on the menu are **Database**, **Folder** and **None**. The **Folder** option is only applicable to photograph, signature and biometric images, all other values must be stored within a database. Because we are linking a primary key field that **must** be linked, we cannot select "**None"** for this field, so choose **Database** from the drop-down menu.



Whenever a field is being linked and **Database** is selected in the **Operator** column, the next column, marked '**Table/Path**' will refresh to display a list of all tables within the linked database. Select the table that contains the external database field you wish to link to the **RecordID** field (or other primary key if dictated by the template design).



After selecting a table, the next column, marked '**Field**' will refresh to list the database fields within the selected template – choose the field you wish to link to the template's primary key.



After you have selected the field, the final column, marked '**Permission**' will update to show you the database permission you have for the external database. '**Read/Write**' means you have full control within the field, while '**Read Only**' means that you cannot write new values into the field. A primary key field **must** allow full access for the Live Link configuration to function properly.

	Operator	Table/Path	Field	Permission
Photo 1	None			
First Name	None			
Last Name	None			
Department	None			
Employee ID	None			
Issue Date	None			
Expiry Date	None			
Level	None			
Permanant	None			
RecordID	Database	Test	IS_KEY	Read/Write

We have now configured the first field for Live Link! Hopefully you are starting to get a feel for what a powerful yet intuitive tool Live Link is. All other fields will be configured in the same manner, that is: Select the Operator, then the Table, and then the Field. This procedure allows any of Asure ID's template fields to be linked intuitively to an external database. Within a given Live Link configuration, you may link to as many different tables as you would like, however they all must be within the same database instance.

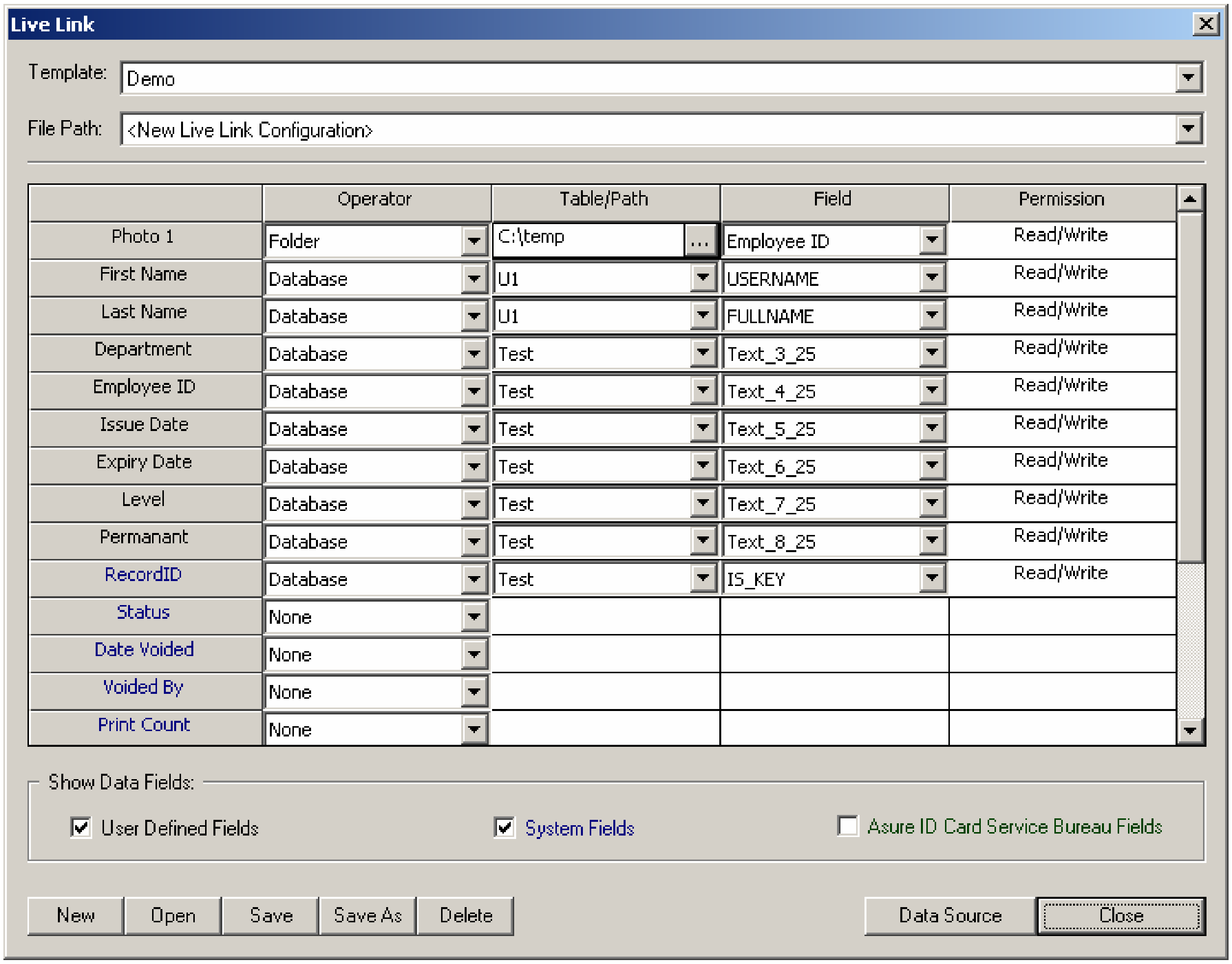
You may now link any or all of the other fields to your database in the same manner that you used for the primary key field.

The 'Folder' Operator

The only difference you may encounter from the above procedure is with the '**Folder**' option found on the **Operator** column. As stated above, this option may **only** be used for image fields – that is photograph, signature or biometric images. The purpose for this operator is to allow the storage of image files within a file folder instead of a database. If you select **Folder** for an image field, you will have a '…' button in the **Table/Path** column that can be used to browse for a folder in which to store the files. Additionally, when selecting a **Folder** operator, the **Field** column will refresh to show all of the template fields – since Asure ID needs to know the filename of the image file to use for each database record, you will need to supply a template field that will provide the naming convention of your image files. For example, if the image files will have the same name as the Employee ID for a given cardholder, select this field in the **Field** column. This naming convention will also be used when storing new images files to the folder, so ensure that you choose a field that will contain a **unique** value for each cardholder.

	Operator	Table/Path	Field	Permission
Photo 1	Folder	C:\temp …	Employee ID	Read/Write

Once you have linked all of the fields you wish to use, the Live Link configuration window should look something like the screenshot below.



Once you have configured the linking in the manner you desire, press the '**Save**' or '**Save As**' buttons to save your configuration. Once it is saved, you can press the '**Close**' button to exit the Live Link configuration window.

At this point, your Live Link configuration is saved, however it is not yet applied, and Asure ID is still reading and writing cardholder records from its own default database.

To switch to the set of records that your Live Link configuration will provide, again click on the '**Live Link**' drop-down menu at the top of the screen. You will now see that below the '**No Live Link**' option is a new entry for the Live Link File that you just saved. Any saved Live Link Files for the active template will be shown on this list, and you may use this menu to switch between them. Select the Live

Link File that you saved, and Asure ID will refresh the cardholder set – instead of showing you records in the default Asure ID database, you will now see the record set provided by the external database that you configured Live Link with.

You may switch back to the default record set at any point by choosing '**No Live Link**' from the '**Live Link**' drop-down menu, and can switch to any previously saved Live Link configuration by selecting it from the same menu.

Limitations on Live Link

When working with Live Link configurations, it is important to understand that there are some limits to the functionality of Asure ID, as well as some limits on the types of databases that can be used.

- The Live Link engine is only able to connect to a single database instance at one given time. Multiple tables and fields within the database are supported, however all data entries must be contained within the same database instance.
- The Live Link engine is only able to address multiple tables within a database if there is a consistent index key across all tables that will be used.
- When working with multiple tables, a 1:1 relationship between the data in the tables is required. This means that if an entity has one record in one table, there is a corresponding single record, matched by index key, in the other tables that will be addressed.
- When using a Live Link configuration with a template, the 'Import', 'Export', 'Archive' and 'Restore' functions will be disabled.

Appendix C - Barcode Limitations and Considerations

Barcodes are seemingly on everything we purchase and are becoming increasingly more and more common on ID badges. They allow us the flexibility to store much more information than would be possible from printing data on the card directly, as well as giving us added security by preventing sensitive information from being displayed in a human readable fashion.

While the benefits of barcodes are quickly apparent, which barcode is best suited to a particular need isn't always as crystal clear.

This reference guide will provide you with the information you need to select the appropriate barcode for your desired results. Please bear in mind that barcodes require the proper reader to decipher the information, so ensuring that you have the proper equipment beforehand is a must.

There are a variety of barcode styles to choose from in Asure ID, the three main ones being:

- Linear
- PDF 417
- Datastrip

The first one that we will take a look at is the linear barcode. It is the most common of the barcode family and has several subsets, each one having its own rules and encoding abilities. Second, we will examine the PDF 417, which is much denser and can encode a lot more information. Finally, we will look at the Datastrip Barcode, which is even more powerful than the PDF 417 and allows for photos to be encoded into it.

Linear Barcodes

It is important to note that while most of the linear barcodes support up to 100 characters there will be a practical limit determined by the physical size of the resulting barcode and the scanning equipment. Bear in mind that an ID Card is not the largest surface to be placing a barcode on!

Code 39 - The Code 39 barcode symbology supports 43 characters plus an additional character used as a delimiter or start/stop character. The 43-character set includes the following:

1234567890ABCDEFGHIJKLMNOPQRSTUVWXYZ - . $ / + %

Note that the alphabetic characters are all upper case. If you wish to use lower case letters or other ASCII characters then Code 39 Full ASCII (sometimes referred to as Extended Code 39) must be used.

The maximum data size is 100 characters.

Code 93 - Code 93 was designed to complement and improve upon Code 39 Full ASCII. It encodes the same character set and the only difference is that Code 93 is a continuous symbology and produces denser code.

Code 128 - Code 128 allows the full ASCII 128 character set to be encoded. It may also be scanned bi-directionally and there is no restriction on the number of characters allowed.
Interleaved 2 of 5 - Interleaved 2 of 5 is capable of encoding numeric data only. The maximum data size is 100 characters.

CodaBar - CodaBar, (sometimes referred to as Code 2 of 7), is a discrete, width-modulated barcode that provides a character set for encoding numeric data plus six special characters. The supported characters are as follows:

1234567890 $ - : / . +

UPC - The Uniform Product Code (UPC) family of codes is typically used for product identification, and includes UPCA and UPCE. These are numeric codes only, supporting only the characters **1234567890.**

- UPCA (12 digit) is limited to 12 characters.
- UPCE (6 digit) is limited to 6 characters.

EAN - European Article Numbering (EAN) codes are an extension of the UPC system. A barcode scanner set to read EAN could also read UPC; however, a scanner set for UPC may not be able to read EAN. This is also a numeric encoding system, which supports the characters **1234567890**.

- EAN-8 is limited to 8 characters
- EAN-13 is limited to 13 characters

Booklan - The Booklan barcode is really an EAN-13 barcode that follows a specific format and is used exclusively with books. The Booklan barcode therefore supports the same character set as the EAN family.

EAN/UCC 128 - This barcode was created through joint cooperation between EAN International and the Uniform Code Council. It incorporates functionality from both barcode styles and is able to encode both alpha and numeric characters. The maximum number of encoded data characters is 48.

PDF 417 Barcodes

PDF 417, or Portable Data File 417, is a two-dimensional stacked bar code symbology capable of encoding over a kilobyte of data per label. This is important for applications where a bar code must be more than merely an identifier such as an index to reference a database. In Asure ID applications, users can place up to 2000 characters of text (often using non-printed entries) into a barcode that takes up less than a quarter of a CR-80 sized card.

The "portable data file" approach is well suited to applications where it is impractical to store item information in a database or where the database is not accessible when and where the item's bar code is read. Because a PDF417 symbol can store so much data, item data such as medical history or digital identifiers can be carried on the item, without requiring access to remote data storage.

In addition, PDF417 is an error-correcting symbology designed for real-world applications where portions of labels can get destroyed in handling. It performs error correction by making calculations, if necessary, to reconstruct un-decoded or corrupted portions of the symbol.
The PDF417 barcode is capable of encoding the full ASCII character set and the amount of data that is capable of being encoded is limitless. Again, the practical limits will be the size of the barcode and scanner.

Datastrip Barcodes

Datastrip's 2D Superscript is ideal for storing multiple biometrics, photographs and text. Some larger bar codes can contain up to 3K of data and also offer aggressive error correction with full data recovery when as much as 50% of the barcode has been damaged.

It is capable of encoding the full ASCII character set as well as photos and biometrics. . In Asure ID Applications, photos, signatures and database values can be placed into the Datastrip barcode. The practical limits of barcode size and scanner will again be the defining factor for the amount of data being stored.

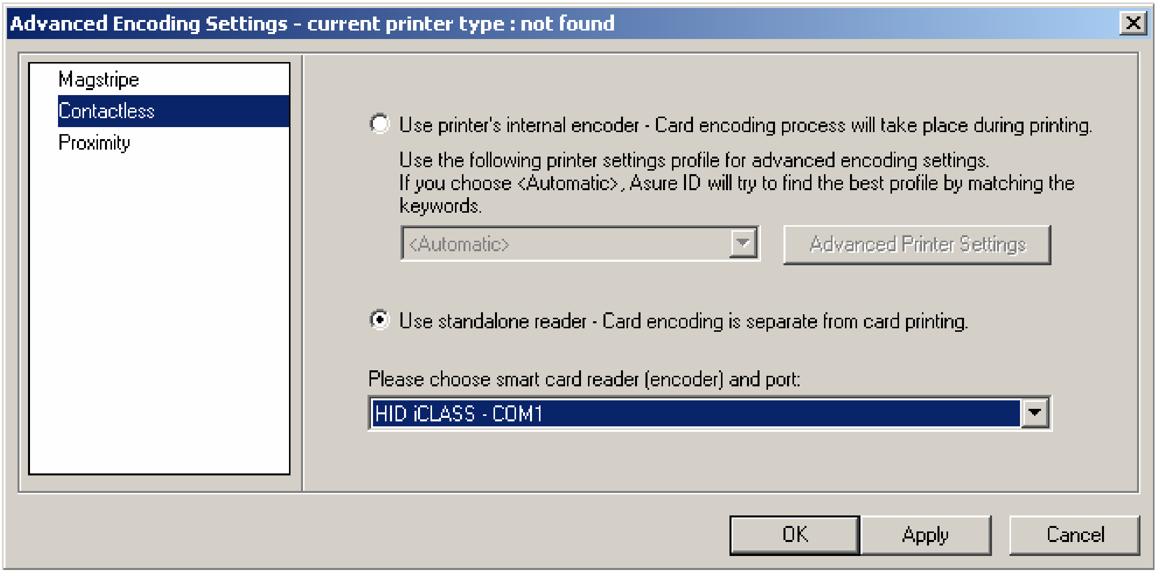
Appendix D - Advanced Encoding & Printing Settings

Asure ID has the ability to communicate with a wide variety of magstripe encoders and smart card couplers. Because these units can either be standalone or integrated within a printer, and additionally the many different settings for addressing all these devices can be very different, we have designed a powerful configuration screen for setting up all of your encoding hardware.

If you need to setup smart card reading or encoding, launch the menu by clicking on ‘Advanced Encoding Settings’ from the ‘Settings’ drop-down menu in Data Entry Center. If you only need to setup magnetic stripe encoding, select ‘Advanced Printer Settings’ from the same menu. Both options will be described in detail below.

When you select ‘Advanced Encoding Settings’, the configuration screen (shown below) will appear.

The window is broken down into tabs, one tab for each type of encoder technology. The tabs are ‘Magstripe’, ‘Prox’, ‘iClass’, ‘MiFare’ and ‘Contact’. Select the tab that corresponds with the type of technology you are configuring. You may configure as many as you require, or return to this menu at any point to change or make new settings.



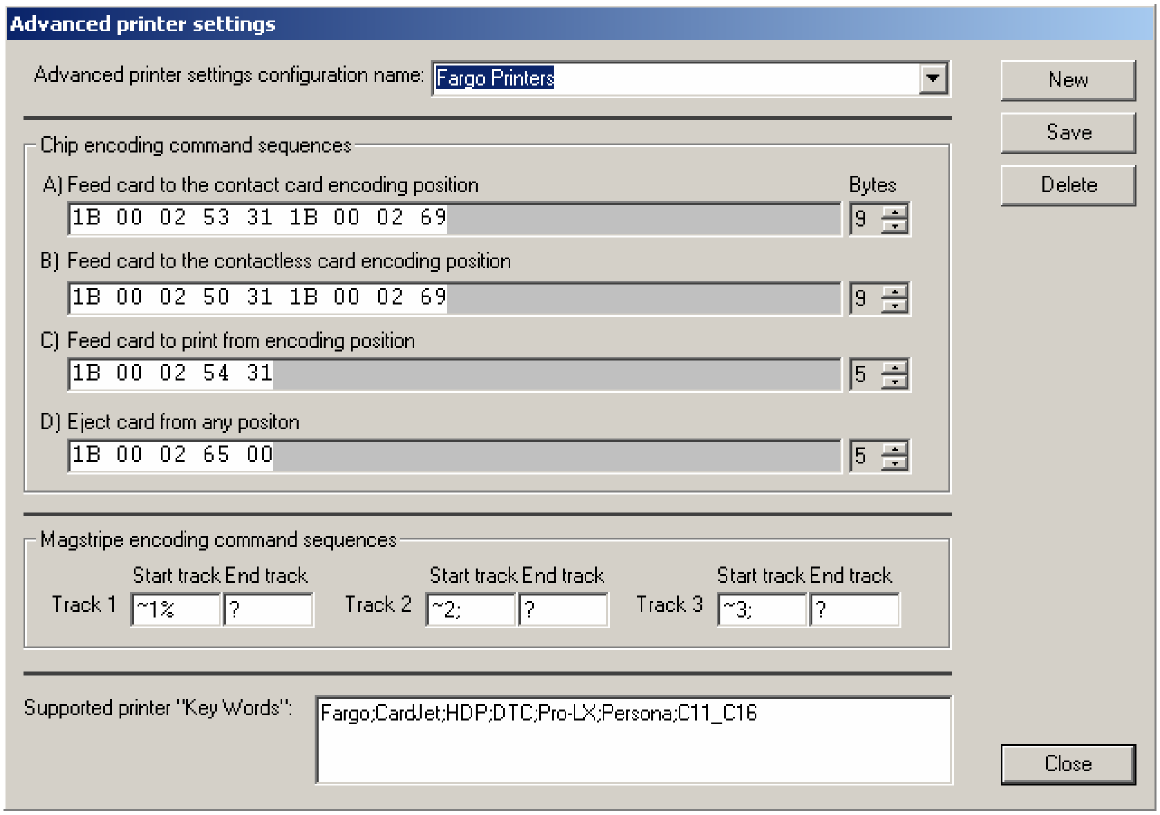
Magstripe

The first tab we will examine is the magstripe tab. There are two global options for this page, ‘Use printer profile encoding settings’ and ‘Use the following encoding settings’. Select the first item if your printer model is on the list, and Asure ID will automatically use the correct settings for your printer. If your printer is not on the list, or your magstripe encoder does not operate correctly with the default setting, select the second item, ‘Use the following encoding settings’.

When selecting this option, the user must manually input the ‘escape characters’ or ‘sentinel characters’ that their encoder uses to initialize magstripe encoding. These can be found in the programming manual for your printer, or obtained by contacting your printer manufacturer.

The settings are made ‘per track’. For each of the three tracks on the magstripe, enter the escape command for both ‘Start track’ and ‘End Track’ commands. When you are happy with your selection, press ‘OK’ to close the window and save your settings.

If your printer has a retrofit encoder, the printer itself may have to be ‘told’ to move the card in and out of the encoder unit. Asure ID knows how to control most printers, however if your printer is not accepting the card movement commands, you may need to manually setup these commands. This is done by pressing the ‘Advanced Printer Settings’ button found on the ‘Advanced Encoding Settings’ window.



The command flow window that appears has a drop-down menu at the top with a variety of presets for different printer models. If your printer is listed, simply select it and Asure ID will handle the rest. If your printer is not listed, or if it is not responding properly to Asure ID's default commands, you may need to manually configure the card movement commands.

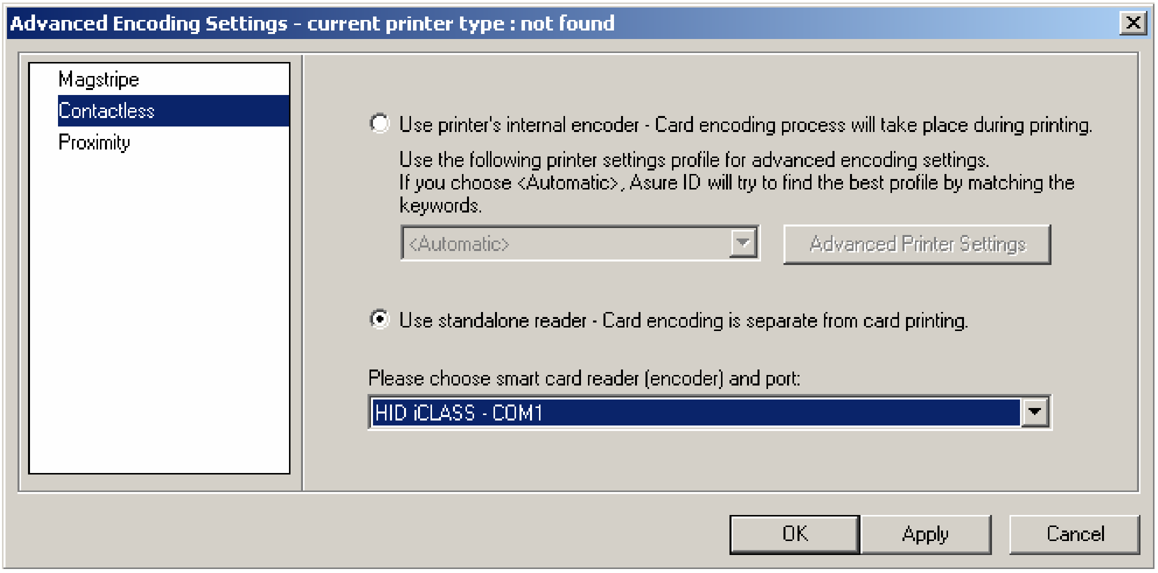
The second item from the top of the page is used to configure the timing of the encoding operation within the print job. You may select to have the encoding performed before printing, after printing, after printing the front of the card, etc. Make the desired setting by clicking on the appropriate radio button.

Next are sets of hardware binary commands used to perform operations such as 'Feed card to encoder module', 'Eject card from encoder module', etc. Each of these needs to be configured for the commands that your printer has been designed to use. Information on the correct values for these items will be available in the programming manual for your printer, or by contacting your printer manufacturer.

Below the binary commands section is an area that is used to set the escape characters that should be sent to the printer's magstripe encoder unit. These are configured in the same manner as described above.

Finally, there is a ‘Supporting Printer Key Words’ section. After configuring the items on this menu, you may save your settings as a preset. Any words entered into this ‘key words’ box will be matched against the name of your print driver – if you have the same word in the print driver name, Asure ID will automatically use this preset. After configuring the window, if you would like to save the settings as a preset, press the ‘Save’ button.

Contactless

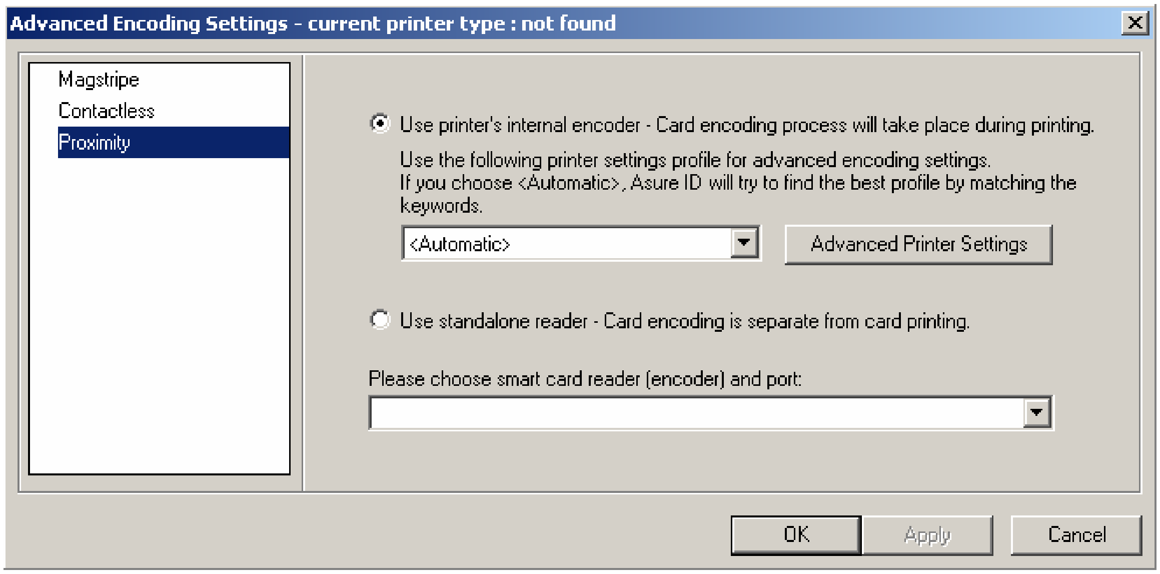


This tab is used to setup the reading of contactless smart card formats, such as HID iCLASS. There are two global options for this page, ‘Use printer internal encoder’ and ‘Use standalone reader’. If you are using an internal coupler within your printer, select the first item, and then select your printer model from the list. If your printer is not listed, or if it is not responding properly to Asure ID’s default settings, you may need to manually setup the printer’s command flow, by pressing the ‘Advanced Printer Settings’ button. Information on configuring these options is described above in the ‘Magstripe’ section.

If you will be using a standalone reader, select ‘Use standalone reader’, and then choose the type of reader from the drop-down list provided. All standalone smart card read/write operations are initialized by selecting ‘Encode Smart Card’ from Data Entry Center’s ‘Card Print’ drop-down menu.

At the bottom of the encoding settings window is a check box marked ‘Use ATP chip configuration’. By default this is selected and it forces Asure ID’s encoding engine to use the card type that was specified when the card template was designed in Card Design Center. If you would like to override this and work with a different card type, clear the check box and select the card type from the provided drop-down menu.

Proximity



This tab is used to setup the reading of proximity type card, such as HID Prox (and compatible) card formats. There are two global options for this page, ‘Use printer internal encoder’ and ‘Use standalone encoder’. If you are using an internal coupler within your printer, select the first item, and then select your printer model from the list. If your printer is not listed, or if it is not responding properly to Asure ID’s default settings, you may need to manually setup the printer’s command flow, by pressing the ‘Advanced Printer Settings’ button. Information on configuring these options is described above in the ‘Magstripe’ section.

If you will be using a standalone reader, select ‘Use standalone reader’, and then choose the type of reader from the drop-down list provided. All standalone smart card read/write operations are initialized by selecting ‘Encode Smart Card’ from Data Entry Center’s ‘Card Print’ drop-down menu.

At the bottom of the encoding settings window is a check box marked ‘Use ATP chip configuration’. By default this is selected and it forces Asure ID’s encoding engine to use the card type that was specified when the card template was designed in Card Design Center. If you would like to override this and work with a different card type, clear the check box and select the card type from the provided drop-down menu.