



# **HID Global Asure ID 7.2<sup>®</sup> Software Application User Guide (Rev. 1.7)**

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Revision Control Number	Date	Document Title
Revision 1.7	December 2011	HID Global Asure ID 7.2 Software Application User Guide (Rev. 1.7)
Revision 1.6	August 2011	HID Global Asure ID 7.1 Software Application User Guide (Rev. 1.6) Addition: Appendix C: iCLASS Programming Platform guide Section 4.6: Third Party Encoding
Revision 1.5	February 2011	HID Global Asure ID 7.0 Software Application User Guide (Rev. 1.5) Addition: Report (Generating and Custom Reporting) and iDIRECTOR
Revision 1.4	February 2010	HID Global Asure ID 2009 Software Application User Guide (Rev. 1.4) Addition: Section 5.2.2: Open Data View
Revision 1.3	November 2009	HID Global Asure ID 2009 Software Application User Guide (Rev. 1.3) SP3 Addition: Section 7.7.1: Creating an iCLASS Card using the MERGE function
Revision 1.2	July 2009	HID Global Asure ID 2009 Software Application User Guide (Rev. 1.2) SP2
Revision 1.1	March 2009	HID Global Asure ID 2009 Software Application User Guide (Rev. 1.1) SP1
Revision 1.0	1 January 2009	HID Global Asure ID 2009 Software Application User Guide (Rev. 1.0)

These reference documents were thoroughly reviewed to provide HID Global with professional and international standards, requirements, guidelines and models for our technical, training and user documentation. At all times, the *Copyright Protection Notice* for each document was adhered to within our HID Global documentation process. This reference to other documents does not imply that HID Global is an ISO-certified company at this time.

ANSI/ISO/ASQ Q9001-2000 American National Standard, (sub-title) Quality Management Systems - Requirements (published by the American Society of Quality, Quality Press, P.O. Box 3005, Milwaukee, Wisconsin 53201-3005)

The ASQ ISO 9000:2000 Handbook (editors, Charles A. Cianfrani, Joseph J. Tsiakals and John E. West; Second Edition; published by the American Society of Quality, Quality Press, 600 N. Plankinton Avenue, Milwaukee, Wisconsin 53203)

Juran's Quality Handbook (editors, Joseph M. Juran and A. Blanton Godfrey; Fifth Edition, McGraw-Hill)

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# Section 1: Introduction to Asure ID 7 Software

Asure ID 7 changes the paradigm of how ID card personalization software looks and feels. The new user interface and simplified processes make ID card template design and data entry an efficient, user friendly application.

## 1.1 Interface

Behind the friendly interface, Asure ID 7 is a productivity powerhouse with tools and capabilities to support the most sophisticated ID card applications.

Whether you are new to ID badging or a power user, Asure ID 7 helps you design and produce ID cards and other secure credentials with unprecedented ease and efficiency.

## 1.2 Navigating Asure ID

If you have used the latest version of Microsoft® Office, the Asure ID 7 user interface will seem familiar. This is because it is based on the Microsoft Ribbon. Tab-driven navigation with convenient tools and fly-out control palettes makes using Asure ID 7 an efficient tool.

### 1.2.1 Reviewing the Routine Tasks (designed within the software)

The new Asure ID 7 user interface provides an excellent speed boost to designing cards and entering cardholder data. Everything you need to design and populate a card is right in front of you, and routine tasks can be performed with a couple of mouse click.

### 1.2.2 Reviewing the Data Entry Center

With this application, you can capture or load a photo, or add a digitized signature. a Data Entry Center with configurable on-screen data fields lets you set up an efficient data entry sequence independent of how the data appears on a card, or is structured in a database.

### 1.2.3 Reviewing the Internal Database

With the Asure ID 7 internal database, you can store card templates and cardholder information.

### 1.2.4 Reviewing the Live Link Capabilities

With Live Link™, you can also print card data from external databases such as HR, security or ERP. The Live Link Wizard sets up real time data exchanges with a few mouse clicks. At print time, Live Link accesses and delivers the data that populates the external data fields on each card.

## 1.3 Product Overview

Asure ID 7 is just one part of a complete, integrated system for the issuance, management and authentication of secure IDs. Your HID Global dealers can custom design a secure identity system using proven HID components including:

- Fargo ID Card Printer/Encoders
- Cards, ribbons, films and overlaminates
- ID card production management software
- Digital cameras and photo accessories
- ID card holders, lanyards and clips
- ID card production services
- HID contact and contactless card readers, including iCLASS® smart card readers

#### **Four Editions – Asure ID 7**

Asure ID 7 comes in four editions with increasing levels of sophistication.

- For ID card applications that call for even greater control and integration into your organization, an Asure ID 7 SDK is also available.
- This User Guide is designed to be used with all versions of Asure ID 7.

#### **Reviewing the Asure ID Solo™ Edition**

Ideal for smaller businesses looking for entry level ID card solutions.

This edition provides an enhanced user experience for photo ID card design and data entry. Card data fields can be populated from the internal Microsoft Access™ database.

#### **Reviewing the Asure ID Express™ Edition**

Includes the advanced card design and batch printing capabilities.

This edition adds features such as compound data fields, batch printing and conditional design and print rules. It can connect to an external Microsoft database.

#### **Reviewing the Asure ID Enterprise™ Edition**

Designed for larger organization that requires multiple operators and database applications.

This edition offers expanded database connectivity and networking for enterprise class card issuance. It works with Microsoft Access and SQL databases and supports ODBC import and export. It supports School Interoperability Framework (SIF).

The Enterprise edition can work with multiple tables within a single database.

#### **Reviewing the Asure ID Exchange™ Edition**

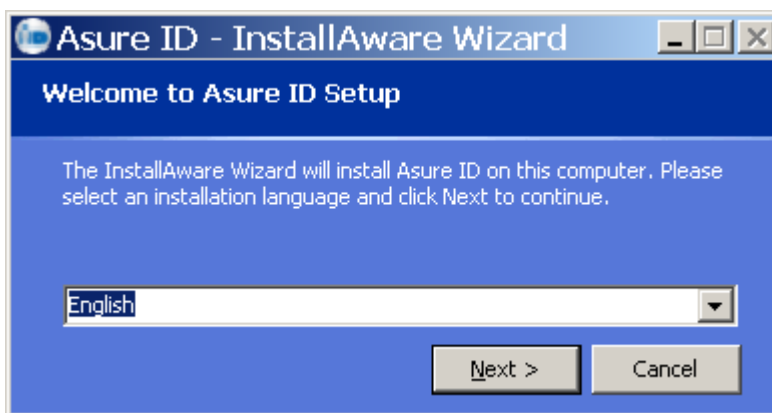
Advanced encoding, design and printing application with integration into enrolment, network and database applications. This edition is designed for the most sophisticated secure credential applications. It adds Oracle, MySQL, LDAP, SIF and DVTel® database support and works with multiple tables within multiple databases.

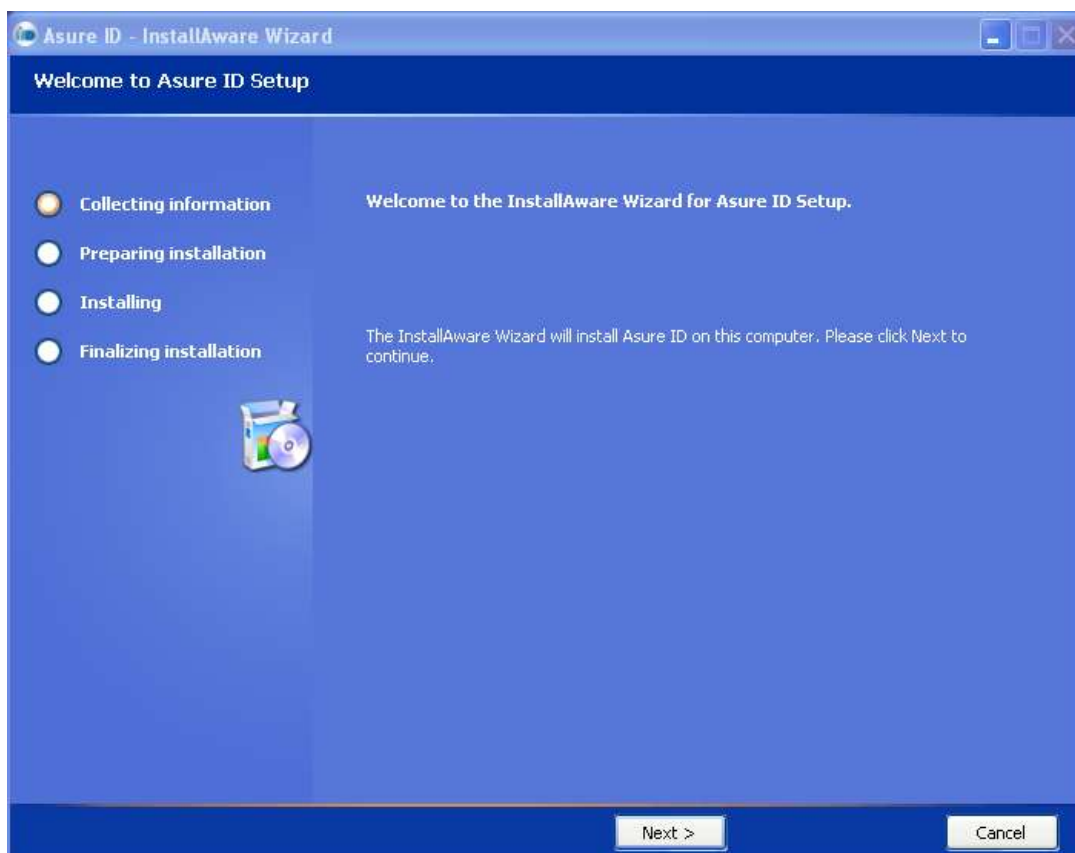
- The iDIRECTOR™ encoding and management module improves smart card deployment and development.
- iDIRECTOR manages how smart card applications are loaded onto cards, including card memory management in one encoding pass.
- Third Party Encoding Option

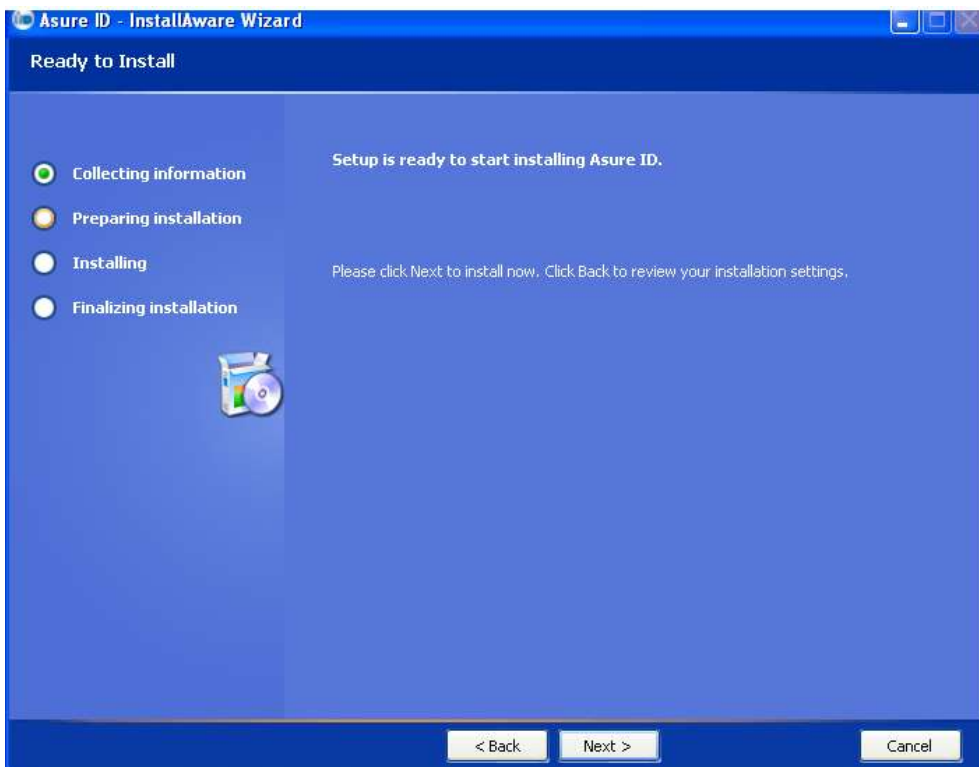
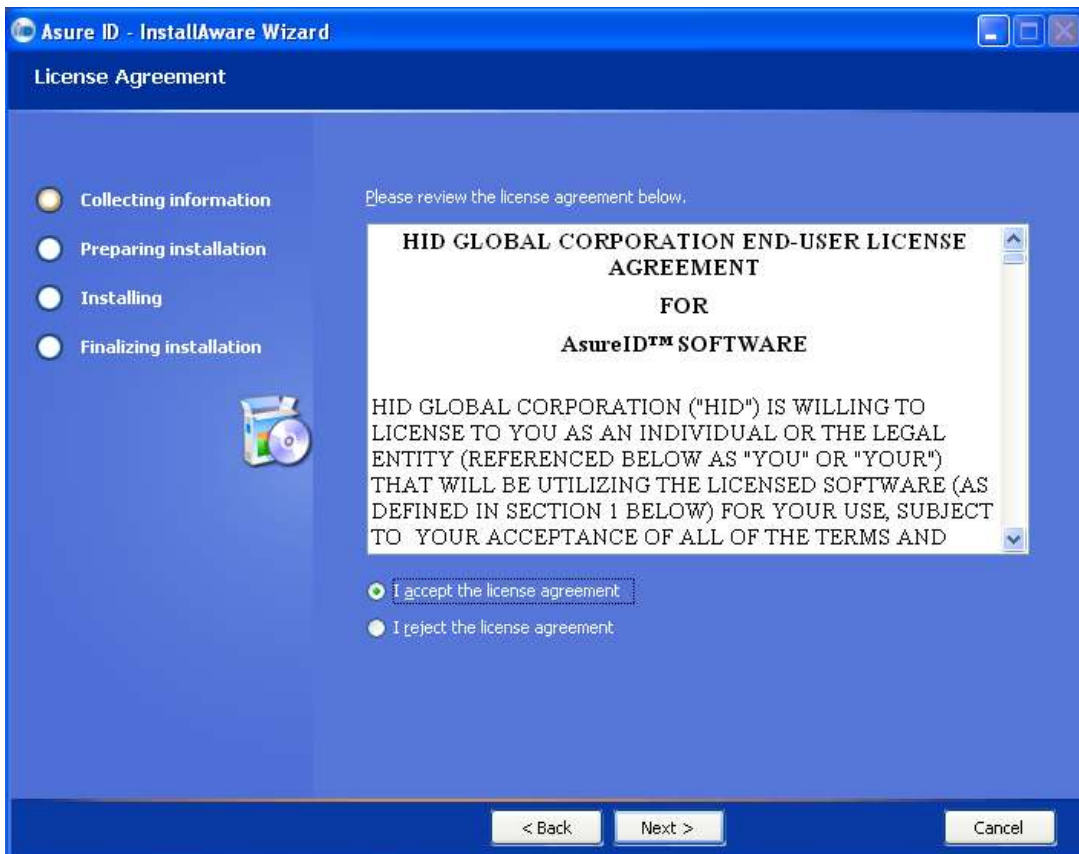
## Section 2: How to Install the Asure ID 7 Software

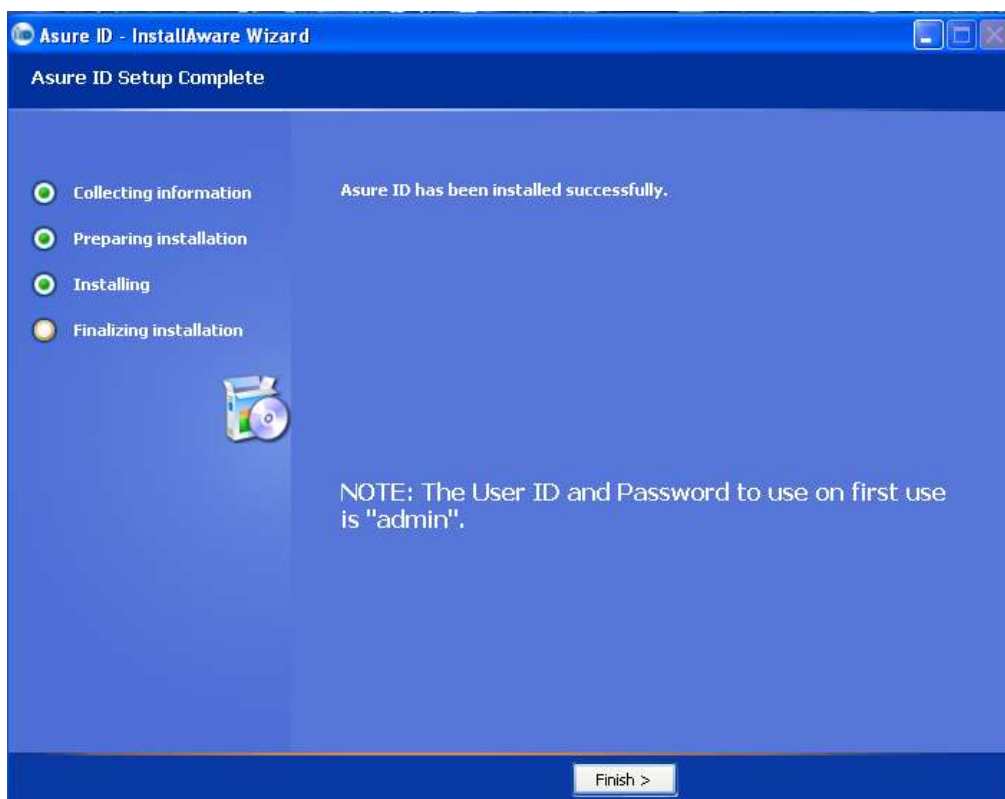
### 2.1 Installation Procedure

Step	Procedure
1	Insert the Asure ID 7 CD and follow the instructions. Browse to the Setup.exe file if the CD does not autorun.
2	Select the language for this installation in the Select Setup Language dialog. Click on <b>Next</b> to continue with the installation. Follow the prompts to FINISH the installation.
3	First time setup: use <b>admin / admin</b> for the User Name and Password.





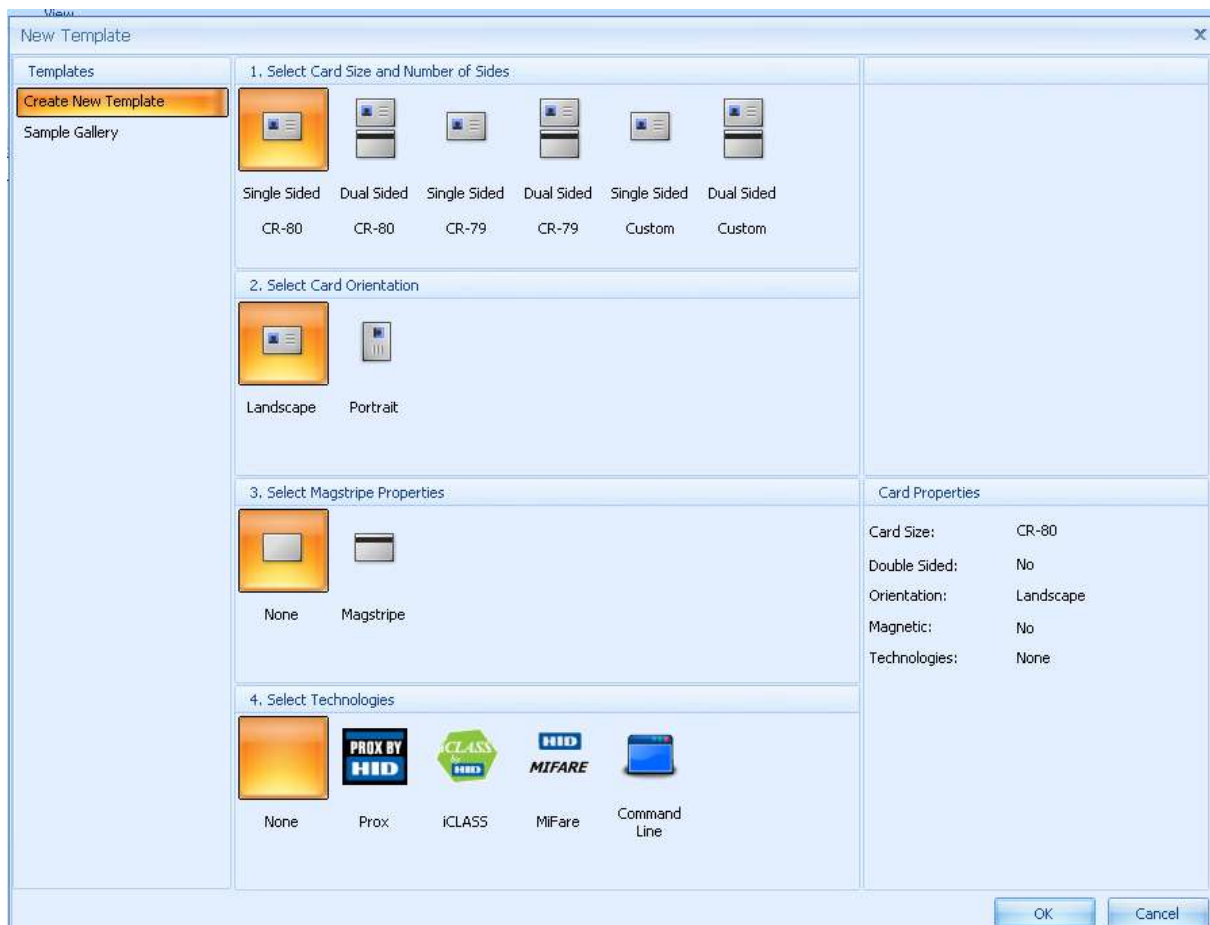




## 2.2 Step-by-Step Tutorial

### 2.2.1 Designing a Card Template

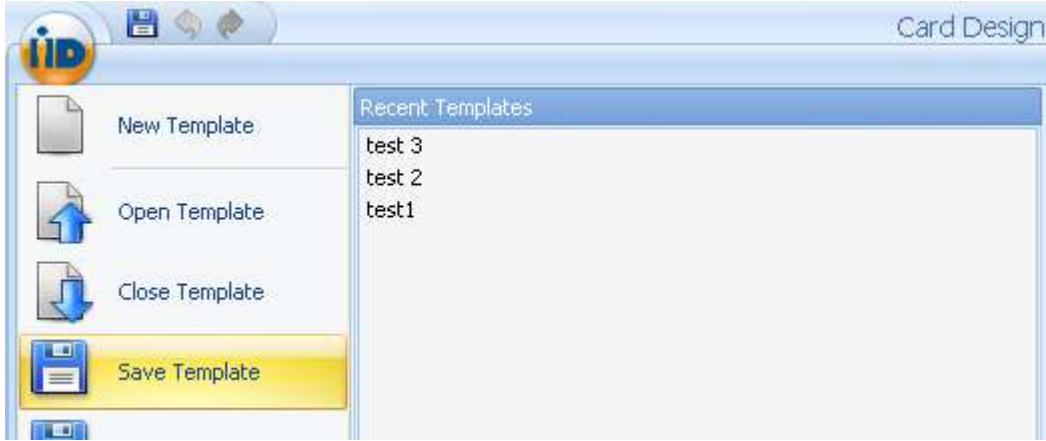
Step	Procedure
1	<p>From the Application Icon, select the <b>New Template</b> selection.</p> <p>For Card Size, select <b>Single Sided CR-80</b>.</p> <p>For Orientation, select <b>Portrait (Vertical)</b>.</p> <p>For Magstripe properties, select <b>Magstripe</b>. (<b>Note:</b> The magnetic stripe is similar to a barcode and encodes information from your existing data fields.)</p> <p>For Technologies, select <b>iCLASS</b>.</p> <p>When completed, click <b>OK</b>. (<b>Note:</b> If using a printer without a magnetic stripe encoder, select <b>None</b> for the Magstripe Properties selection.)</p>



Step	Procedure
2	<p>Select <b>Single Card View</b> on the lower Right-hand corner of the task bar. (<b>Note:</b> The Card Front should now be displayed.)</p> <p>If not, adjust the Zoom percentage next to the card view.</p>
3	<p>Right-click on the background of the front the card and select <b>Add Background</b>.</p> <p>Select one of the default background images or select <b>Browse...</b> to choose one of your own.</p> <p>Once selected, click <b>OK</b>.</p>
4	All of the following Steps will be selected from the <b>Home</b> tab.
5	<p>From the Imaging group, select <b>Photo</b>. Click on the background image.</p> <p>Within the <b>Image Properties</b> dialog both the <b>Border Color</b> and <b>Border Width</b> can be modified at this time.</p> <p>When completed, click <b>OK</b> to close the Image Properties dialog. (<b>Note:</b> Position the Photo precisely upon the background image.)</p>
6	<p>From the Imaging group, select <b>Image</b>. Click on the background image.</p> <p>Within the <b>Image Properties</b> dialog, click the <b>Load new Image from File</b> link. The link will open a standard Windows <b>Browse</b> dialog.</p> <p><b>Browse</b> and then, select the desired image. Click <b>Open</b>.</p> <p>Click <b>OK</b> to close the Image Properties dialog. (<b>Note:</b> Position the Image on the background image.)</p>
7	<p>From the Text group, select <b>Text Label</b>. Click on the background image. (<b>Note:</b> The <b>Text Label</b> Properties window will appear.)</p> <p>Type in some text, for this example we will use <b>ABC Electronics, Inc.</b> (<b>Note:</b> Within this dialog, the <b>Font</b>, <b>Color</b>, <b>Height</b> and <b>Style</b> can be changed to your liking.)</p> <p>When completed, click <b>OK</b> to close the dialog. (<b>Note:</b> Position the item precisely upon the background image.)</p>
8	<p>From the Text group, select <b>Data Field</b>. Click on the background Image. The <b>Data Field</b> Properties dialog will appear. Within the <b>Field Name:</b> field type in the word <b>First and Last Name</b>.</p> <p>Make sure that <b>Text</b> is selected as the <b>Field Type</b>. Make any necessary changes to the <b>Font</b> properties.</p> <p>Under <b>Options</b>, select the <b>Reduce to Fit</b> (or adjusted to fit your dimensions).</p> <p>Under the Data Field, select the Advanced Data Field Options link.</p>



	<p>Type in a First and Last name within the <b>Default Value:</b> field.</p> <p>Change the <b>Max Characters</b> (maximum characters required): setting to 25.</p> <p>Click <b>OK</b> to close this dialog and then <b>OK</b> again to close the <b>Data Field Properties</b>. (<b>Note:</b> Position the item precisely upon the background image.)</p>
9	<p>From the Text group, select <b>Data Field</b> a second time. Click on the background Image. The <b>Data Field Properties</b> dialog will appear.</p> <p>Within the <b>Field Name:</b> field type in the word <b>Position</b>. Make sure that <b>Text</b> is selected as the <b>Field Type</b>. Make any necessary changes to the <b>Font</b> properties.</p> <p>Under <b>Options</b>, select the <b>Reduce to Fit</b> (or adjusted to fit your dimensions) selection.</p> <p>Under the <b>Data Field</b>, select the <b>Advanced Data Field Options</b> link. Type in a Position within the <b>Default Value:</b> field.</p> <p>Change the <b>Max Characters</b> (maximum characters required): setting to 25.</p> <p>Click <b>OK</b> to close this dialog and then <b>OK</b> again to close the <b>Data Field Properties</b>. Position the item precisely upon the background image.</p>
10	<p>From the Text group, select <b>Data Field</b> a third time. Click on the background image. (<b>Note:</b> The <b>Data Field Properties</b> dialog will appear.)</p> <p>Within the <b>Field Name:</b> field type in the word <b>Employee Number</b>.</p> <p>Make sure that <b>Numeric</b> is selected as the <b>Field Type</b>.</p> <p>Make any necessary changes to the <b>Font</b> properties.</p> <p>Under <b>Options</b>, select the <b>Reduce to Fit</b> (or adjusted to fit your dimensions) selection.</p> <p>Under the Data Field, select the Advanced Data Field Options link.</p> <p>Type in a 5 digit number within the <b>Default Value:</b> field.</p> <p>Change the Max (maximum) Characters (required): setting to 5.</p> <p>Click <b>OK</b> to close this dialog and then <b>OK</b> again to close the <b>Data Field Properties</b>.</p> <p>Position the item precisely upon the background image.</p>
11	<p>From the Barcode group, select Barcode. Click on the background image. (<b>Note:</b> The Barcode Properties dialog will appear.)</p> <p>Make sure that <b>Code 39</b> is selected under the <b>Type:</b> designation.</p> <p>Under <b>Select Fields</b>, click on <b>Employee Number</b> within <b>Available:</b>. Click <b>Add&gt;&gt;</b>. (<b>Note:</b> The number entered within the Employee Number field during enrollment will automatically populate the barcode.)</p> <p>Position the item precisely upon the background image.</p>
12	<p>If using a printer without a magnetic stripe encoder disregard the next step, Save</p>

	<p>your work and proceed to <b>Data Entry</b>.</p> <p>To save your work, select <b>Save Template</b> from the <b>Application</b> icon.</p> <p>Name the file and click <b>OK</b> to close the <b>Save Template</b> dialog.</p> 
13	<p>Click the Card Setup tab and then the <b>Magstripe</b> option from the Technology Group. This will launch the Magstripe Properties dialog. Select the <b>Track 1</b> tab. (<b>Note:</b> The magnetic stripe is similar to a barcode and encodes information from your existing data fields.)</p> <p>Under <b>Select Fields</b>, select <b>First and Last Name</b>. Click <b>Add&gt;&gt;</b>. Next, select the <b>Track 2</b> tab.</p> <p>Under Select Fields, select Employee Number. Click Add&gt;&gt;.</p> <p>Click <b>OK</b> to close the Magnetic Properties dialog.</p> <p>The name entered within the First and Last Name field during enrollment will automatically populate Track 1 within the magstripe.</p> <p>The number entered within the Employee Number field during enrollment will automatically populate Track 2 within the magnetic stripe.</p>
14	<p>Save your work and proceed to <b>Data Entry</b>.</p> <p>To save your work, select <b>Save Template</b> from the <b>Application</b> icon.</p> <p>Name the file and click <b>OK</b> to close the <b>Save Template</b> dialog.</p>

## 2.2.2 Creating a Card with Data Fields

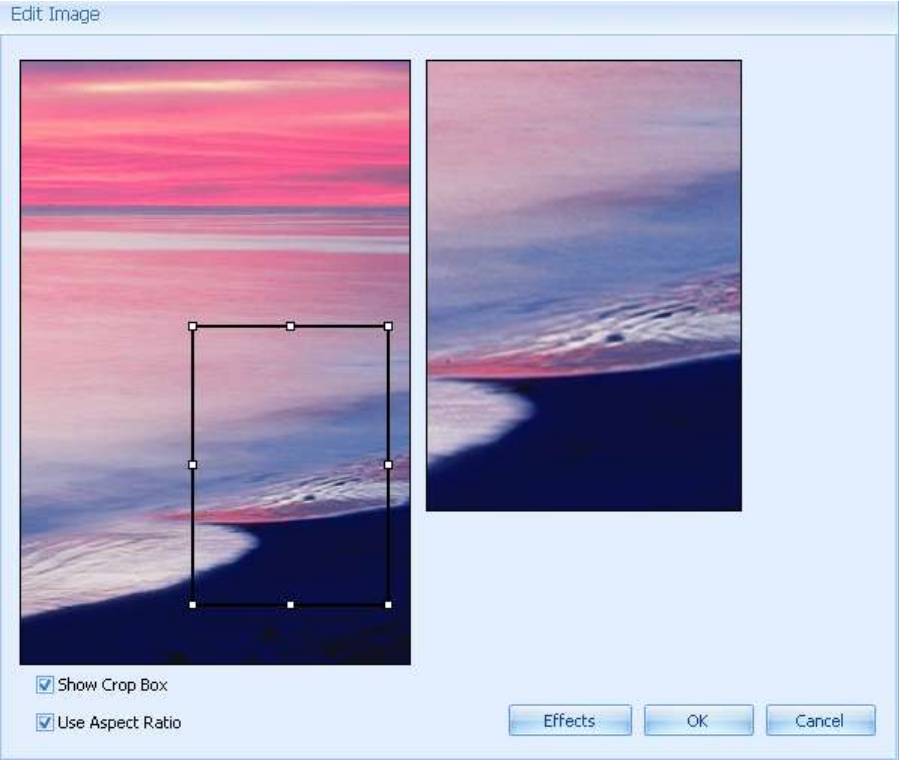
The purpose of this Card Design is to enter data into **Data Fields**.

Step	Procedure
1	Verify the following: Asure ID is installed on your PC. a printer is connected to the customers. The PC User is set up in the application.
2	Launch the Asure ID 7 software.
3	Enter your User ID and Password in the appropriate areas.
4	Access the Card Design Center application.
5	Access the Application Menu and select <b>New Template</b> from the dropdown menu.
6	Select the attributes for the card (you want to create). Click <b>OK</b> . ( <b>Note:</b> The card surface will display the attributes of the card properties selected.)
7	Navigate to the <b>Text</b> section on the Ribbon and select <b>Data field</b> .
8	Drag/drop data object onto the card surface.
9	Designate a Field Name for the object that will be displayed on the card surface, as well as in the data entry screen in the Data Entry application.
10	Specify the data type by selecting from the list of radio buttons. ( <b>Note:</b> The default is text.)
11	Specify additional property values or use the default values. Click <b>OK</b> .
12	Select <b>Print on Fluorescing Panel</b> if this data should be viewed only with ultra-violet light.
13	Select <b>Save Template</b> in the Application dropdown menu.

## 2.2.3 Creating a Card Template with an Image from file

The purpose of this Card Design is to enter an image from a file.

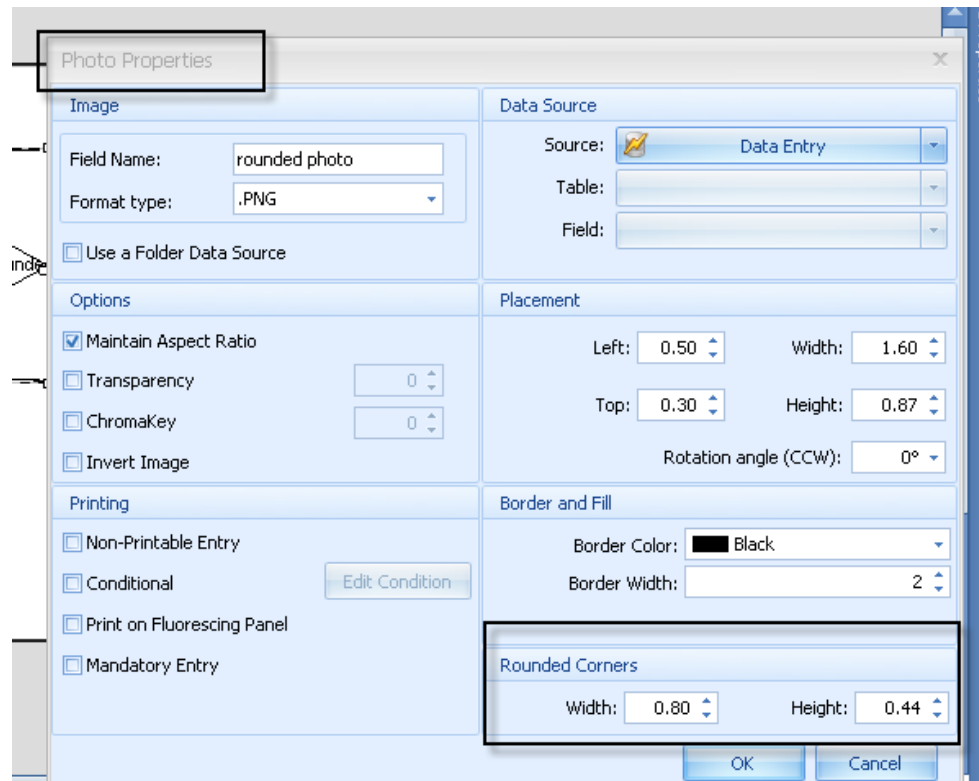
Step	Procedure
1	Access the Card Design Center application.
2	Access the Application Menu and select <b>New Template</b> from the dropdown menu.
3	Select the attributes for the card (you want to create). Click <b>OK</b> . ( <b>Note:</b> The card surface will display the attributes of the card properties selected.)
4	Navigate to the <b>Imaging</b> section on the Ribbon and select <b>Image</b> .
5	Drag/drop the Image object onto the card surface in desired shape of field.
6	Load the image from file by selecting to load the new image from the File link on the Properties window and (then) navigate to where the file is located. Select the file. ( <b>Note:</b> The image will be displayed in the preview box in the Properties window box.)
7	Specify additional property values or use the default values. Click <b>OK</b> . ( <b>Note:</b> The image object will be displayed with the parameters established when the object was drawn onto the card surface.)

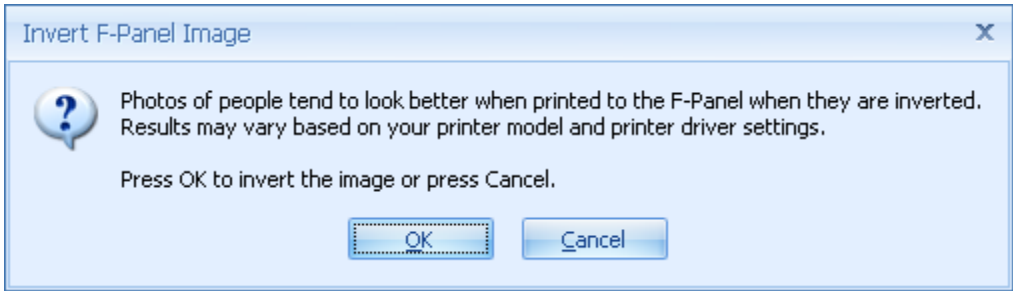
Step	Procedure
8	<p>The image may be edited or proportionally cropped.</p> <ol style="list-style-type: none"> <li>Click the “Edit Image” hyperlink</li> <li>Check the “Show Crop Box” checkbox.</li> </ol> <p>In Card Design, the aspect ratio used for cropping an image is now proportionate to the shape of the Image object placed on the card, instead of proportionate to the shape of the image loaded in.</p> 
9	<p>Select <b>Print on Fluorescing Panel</b> if this data should be viewed only with ultra violet light.</p> <p>Select <b>Invert Image</b> if this effect is required.</p>
10	<p>Select <b>Save Template</b> in the dropdown menu.</p>

## 2.2.4 Creating a Card with Photo Field

The purpose of this Card Design is to enter a Photo Field from a database.

Step	Procedure
1	Launch the software.
2	Enter your User ID and Password in the appropriate areas.
3	Access the Card Design Center application.
4	Access the Application Menu and select <b>New Template</b> from the dropdown menu.
5	Select the attributes for the card (you want to create). Click <b>OK</b> . ( <b>Note:</b> The card surface will display the attributes of the card properties selected.)
6	Navigate to the <b>Imaging</b> section on the Ribbon and select <b>PHOTO</b> .
7	Drag/drop the photo object onto the card surface in desired shape of field. Option for rounded edges available in Properties.



Step	Procedure
8	<p>Designate a field name for the photo object that will be displayed on the card surface.</p> <p>Set up the Data Source or the Folder Data Source for image retrieval.</p> <p>Click <b>OK</b> to save the Photo properties.</p>
9	<p>Select <b>Print on Fluorescing Panel</b> if this data should be viewed only with ultra violet light.</p> <p>Select <b>Invert Image</b> if this effect is required.</p> 
10	<p>From the <b>Card Setup</b> tab, select the <b>Add a Data Source</b> to connect to the Live Link data source. (<b>Note:</b> This starts the Live Link Wizard to access the database where the photos are stored.)</p>
11	<p>Follow the Wizard to establish connection to database.</p>
12	<p>Select the specific table from the database.</p>
13	<p>Select the specific field from the database. (<b>Note:</b> The photo object will be displayed with the parameters established when the object was drawn onto the card surface.)</p>
14	<p>Drag/drop data field object onto the card surface.</p> <p>Check the box for designating object as key field.</p>
15	<p>Access the <b>Advanced</b> options to select table and field in linked database.</p>
16	<p>Select <b>Save Template</b> in the dropdown menu.</p>

## 2.2.5 Creating Magnetic Stripe Cards

The purpose of this Card Design is to add Magnetic Encoded data to the card.

Step	Procedure
1	Launch the Asure ID 7 software.
2	Enter your User ID and Password in the appropriate areas.
3	Access the Card Design Center application.
4	Navigate to the <b>Card Setup</b> tab on the menu Ribbon. Select the <b>Dual-Sided Card</b> icon in the technology section.
5	Select <b>Magstripe</b> . ( <b>Note:</b> The Magstripe Properties are set for Type (ISO or Non-ISO or Custom) and Options.)
6	Drop data objects onto the card surface based on the information required to be encoded on the magnetic stripe. ( <b>Note:</b> These may be set as non printable within the Properties window of that object.)
7	Select the <b>Magstripe</b> tab to access Tracks 1, 2, and 3 (Properties).
8	Select fields to be added to each track of the magnetic stripe. ( <b>Note:</b> The current field options are in the Available box.) Use Add to make that field active.
9	Select <b>Save Template</b> in the dropdown menu.



## 2.2.6 Creating a Card with Compound Data field

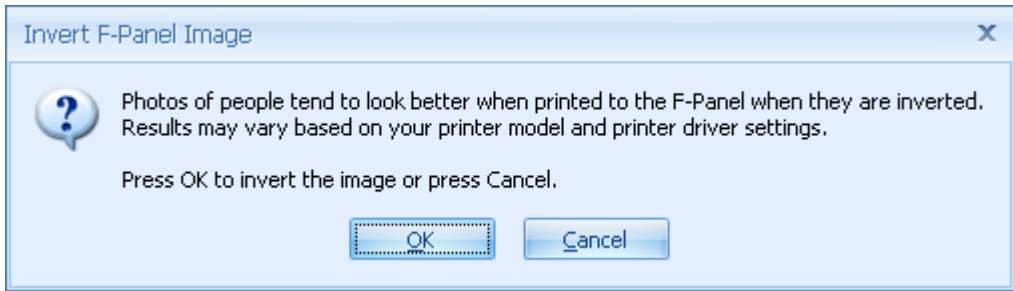
The purpose of this Card Design is to enter Compound **Data Fields** at Data Entry.

Step	Procedure
1	Launch the Asure ID 7 software.
2	Enter your User ID and Password in the appropriate areas.
3	Access the Card Design Center application.
4	Access the Application Menu and select <b>New Template</b> from the dropdown menu.
5	Select the attributes for the card (you want to create). Click <b>OK</b> . ( <b>Note:</b> The card surface will display the attributes of the card properties selected.)
6	Navigate to the <b>Text</b> section on the Ribbon and select <b>COMPOUND Data field</b> .
7	Drag/drop data object onto the card surface popping up the Properties window box.
8	Designate a <b>Field Name</b> for the object that will be displayed on the card surface.
9	Click on the <b>Insert Data field</b> link to add data to the field through the next Properties window box or click on the <b>Insert existing data field</b> link to use a data field that is already set up on the card template.
10	Designate the field name for a field inside of the <b>Compound Field</b> and designates the type of field.
11	Designate the Data Source as either a Data Entry or a Live Link Entry.
12	Specify additional property values or use the default values. Please note that the font properties for each field inside of the <b>Compound Field</b> can set individually. Click <b>OK</b> .
13	Continue with Steps 11 to 14 until all fields within the <b>Compound Field</b> are set up.

Step	Procedure
14	Specify any additional options for the compound field (as needed) or use default values.
15	Select <b>Print on Fluorescing Panel</b> if this data should be viewed only with ultra violet light.
16	Select <b>Save Template</b> in the dropdown menu.

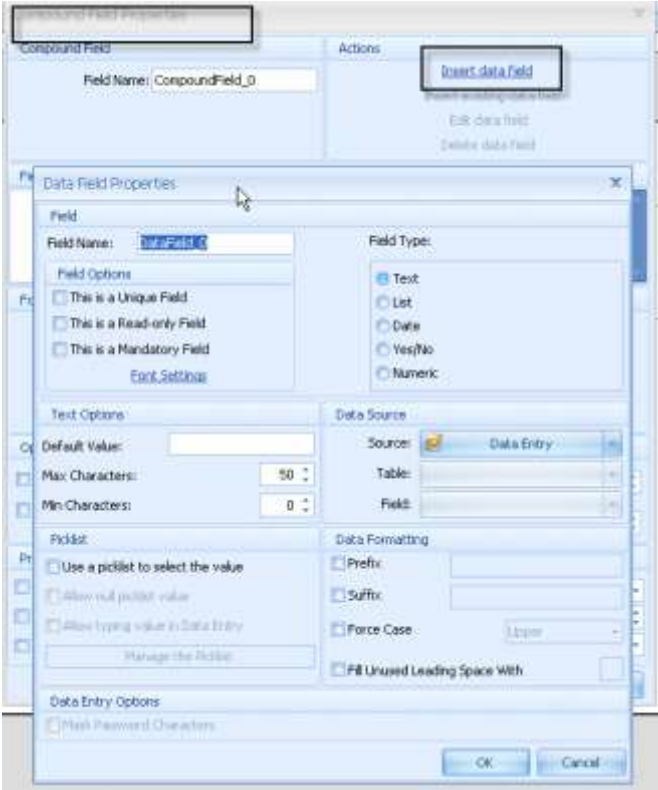
## 2.2.6 Creating a Card with a Photo Field

The purpose of this Card Design is to enter a Photo Field from a file.

Step	Procedure
1	Launch the Asure ID 7 software.
2	Enter your User ID and Password in the appropriate areas.
3	Access the Card Design Center application.
4	Access the Application Menu and select <b>New Template</b> from the dropdown menu.
5	Select the attributes for the card (you want to create). Click <b>OK</b> . ( <b>Note:</b> The card surface will display the attributes of the card properties selected.)
6	Navigate to the <b>Imaging</b> section on the Ribbon and select <b>Photo</b> .
7	Drag/drop the photo object onto the card surface.
8	Designate a field name for the photo object that will be displayed on the card surface in the Data Entry screen in the Data Entry application.
9	Specify additional property values or use the default values. Click <b>OK</b> . ( <b>Note:</b> The photo object will be displayed with the predefined parameters. This is accomplished when the object was drawn onto the card surface.)
10	Select <b>Print on Fluorescing Panel</b> if this data should be viewed only with ultra violet light. Select <b>Invert Image</b> if this effect is required. 
11	Select <b>Save Template</b> in the dropdown menu.

## 2.2.7 Using the Clone Feature

Cloning is the act of linking a Data Field to another Data Field on the same Template. It is very similar to Template Binding, except that all Data Fields exist on the same Template and in the same card database.

Step	Procedure
1	<p>Clone a field by following these instructions:</p> <p>Create a field.</p> <p>Right click on the field and choose [Create a clone]. (<b>Note:</b> This will work for Data Fields, Photos and Signatures, but not Compound Fields. Compound Fields themselves cannot be cloned, but they can create clone references to Data Fields. See below.)</p> <p>Clone fields will be read ONLY in Data Entry.</p> <p>a Data Fields that contains Clone references cannot be deleted until the Clone is deleted. (<b>Note:</b> a clone can be deleted at any time.)</p> <p>The Fluorescing option may be used by checking the <b>Print on Fluorescing Panel</b>.</p> <p>(<b>Note:</b> The field will appear on the template with the same name as the field that was cloned; however, it will also have the term <i>clone</i> and a number appended.)</p> 

## Section 3: Using the User Config Application

### 3.1 Accessing User Config functions

Click on the User Config icon to bring up this application. You can work with the Home tab or the View tab functionality. You can save your work by clicking on the **Save** icon in the upper left corner, as shown below.

We have presented the functions in this application in a left-to-right Menu Bar review throughout this section.



### 3.1.1 Setting User Privileges

These options may be set by the Administrator for each user account:

Access Asure ID 7 via your Windows User ID and password.

Access the Card Design application.

Access the Data Entry application.

Access the card printing function with in the Data Entry application.

Access the User Configuration application.

Access the Report application.

Access the Program Options settings located under the application button.

## 3.2 Selecting Home tab



### 3.2.1 Selecting Clipboard – Cut, Copy, and Paste



### 3.2.2 Selecting Asure ID Users – Add User, Remove User, and Save Users

To save all users in the user profile table, click the **Save Users** button on the ribbon. To delete a user, move the cursor to highlight the user in the user profile table, and then click the **Remove User** button on the ribbon.



### 3.2.3 Adding Users

Enter the appropriate User Name and Password to access the application. Use the appropriate upper and lower case. Check to ensure that the **Caps Lock** is turned off. (**Important:** You should change the password for security reasons.)

User ID (default): admin


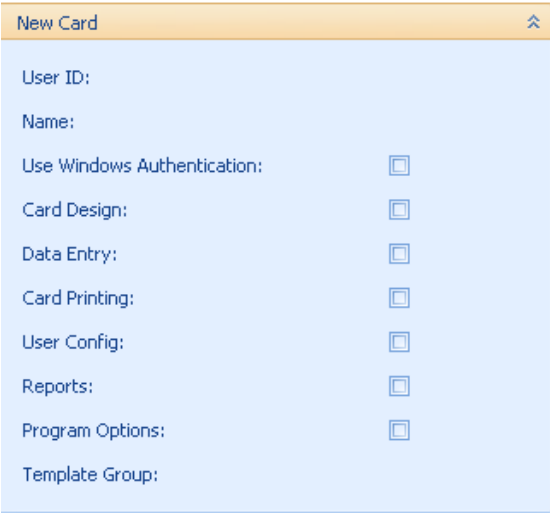
Password (default): admin







### 3.2.4 Adding Users (2)

The User Configuration application allows the Administrator to create users for Asure ID and to set the profiles of what functions each user can access in the application.

Step	Procedure
1	<p>To create a new user, the Administrator would click on the <b>Add User</b> button on the ribbon.</p>  <p>The Administrator may enter the user name, set the user ID and password, and set the appropriate privileges for this new user.</p> <p>When this is done, a blank row is added to the user profile table.</p> 

Step	Procedure
2	<p>The Administrator can set the following:</p> <p>Customizable security settings per user and per groups.</p> <p>Security settings for users and groups on fields and templates.</p>
3	You can utilize Windows Authentication for the User Name and Password import.
4	<p>Open the <b>VIEW</b> to set how the layout will look.</p> <p>Record or Table view, Carousel or Single Row and Customize Layout.</p> 
5	<p>To use <b>Customize Layout</b> drag and drop the options in the order you prefer. This is done under the <b>Template Card</b> tab.</p> <p>See the <b>View Layout</b> to preview the data page.</p>
6	<p>Select the <b>Save</b> icon to save the user profile.</p> 

### 3.2.5 Selecting Password – Change Password

The purpose of this case is to change the Password.

Step	Procedure
1	From the Password tab, enter and confirm the password for the user.
2	Select the <b>Save</b> icon to save the user profile.
3	To change a password, locate the record to be updated and make the changes. Click <b>OK</b> .



## 3.3 Selecting the View tab



### 3.3.1 Selecting View – Record and Table



Record 1 of 1

User ID:	admin
Name:	Administrator
Use Windows Authentication:	<input type="checkbox"/>
Card Design:	<input checked="" type="checkbox"/>
Data Entry:	<input checked="" type="checkbox"/>
Card Printing:	<input checked="" type="checkbox"/>
User Config:	<input checked="" type="checkbox"/>
Reports:	<input checked="" type="checkbox"/>
Program Options:	<input checked="" type="checkbox"/>
Template Group:	

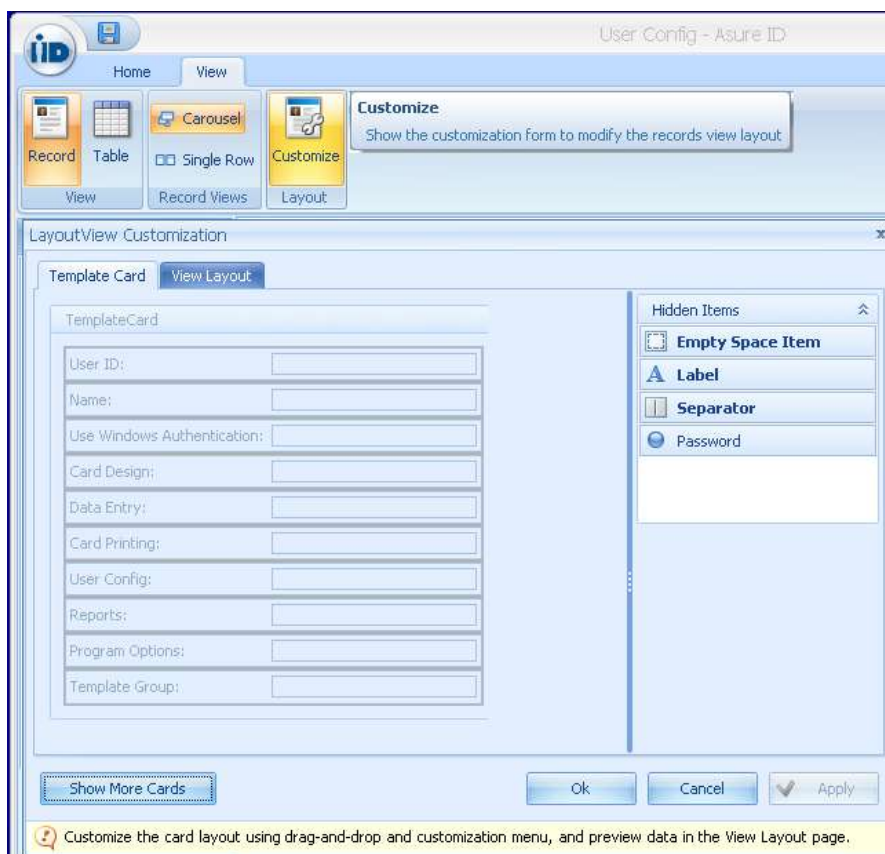
Drag a column header here to group by that column

User ID	Name	Use Windo...	Card Design	Data Entry	Card Printing
> admin	Administrator	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### 3.3.2 Selecting Record Views – Carousel and Single Row



### 3.3.3 Selecting Layout – Customize



## Section 4: Using the Card Design Application

You can use the Card Design Center to create the card layout for both printing and encoding objects. We have gone to great lengths to make this a user friendly, easy-to-follow application. (**Note:** Each card layout is saved as a template for use by the Data Entry application for enrollment and printing.)

### 4.1 Reviewing the Card Design Window

You can use a simple drag-and-drop visual interface, while Asure ID takes care of creating a custom database for you behind the scenes. Controls are organized into logical groups. Groups are organized onto tabs Home, Card Setup and View as shown below.

With the Asure ID's Card Design Center, you can:

- Layout and design a card template.

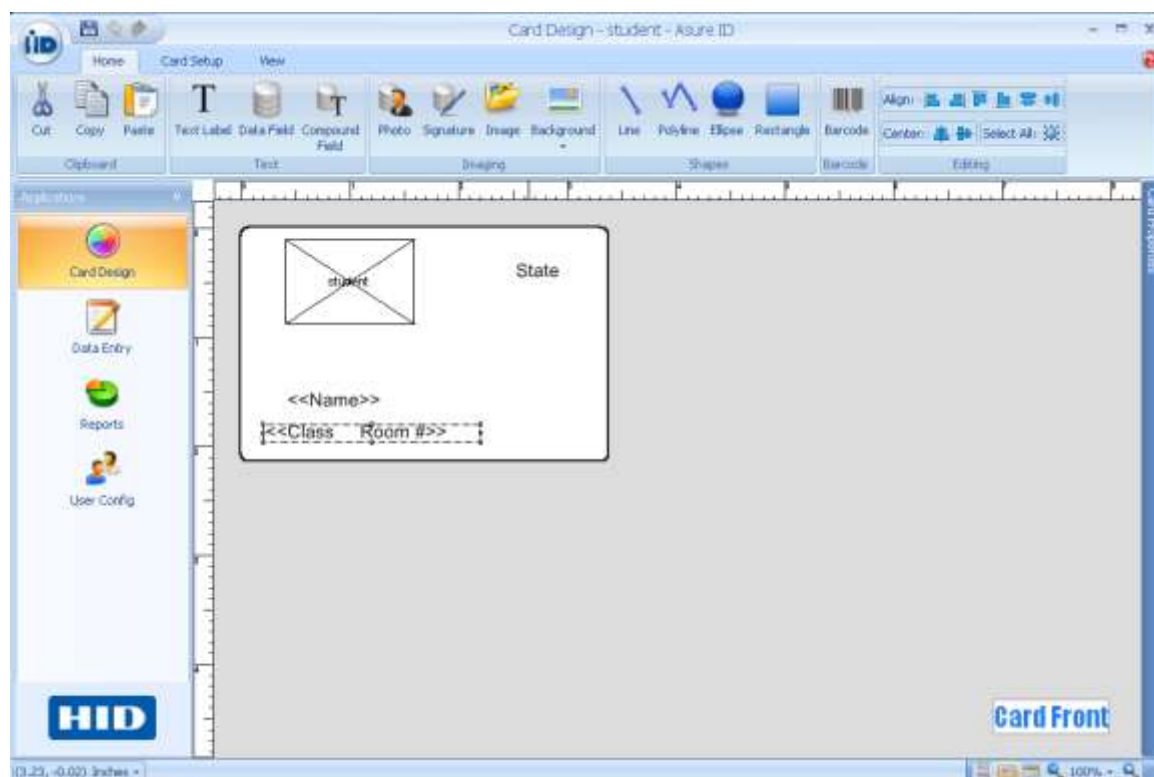
- Add technologies including barcode.

- Personalize your work environment including adding and removing Grid lines and Rulers as well as modifying the Card View, Orientation, Zoom Level and Properties.

- Link **Data Fields** to external data sources.

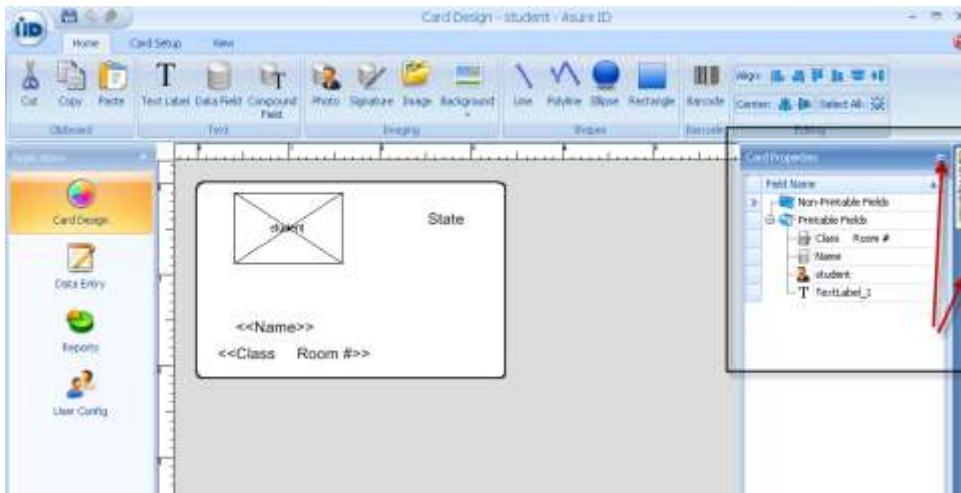
- Save, edit and export your work.

In this section, you will find a comprehensive listing of all the options found in Card Design Center and your various corresponding functions.



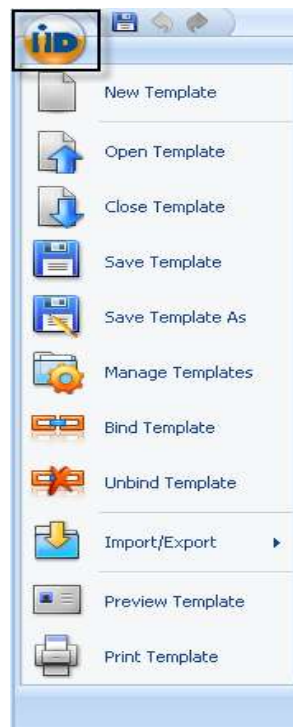
#### 4.1.2 Toggling the Card Properties window

Click on this sidebar or the PIN display the Card Properties pane on the right side of the screen. (**Note:** This is where the technology information, and any other card related information can be viewed.)



## 4.2 Accessing the Card Design Application Menu

You can click on the **Application Menu** button (located in the upper left corner of the window) to bring up the dropdown menu, as shown below.



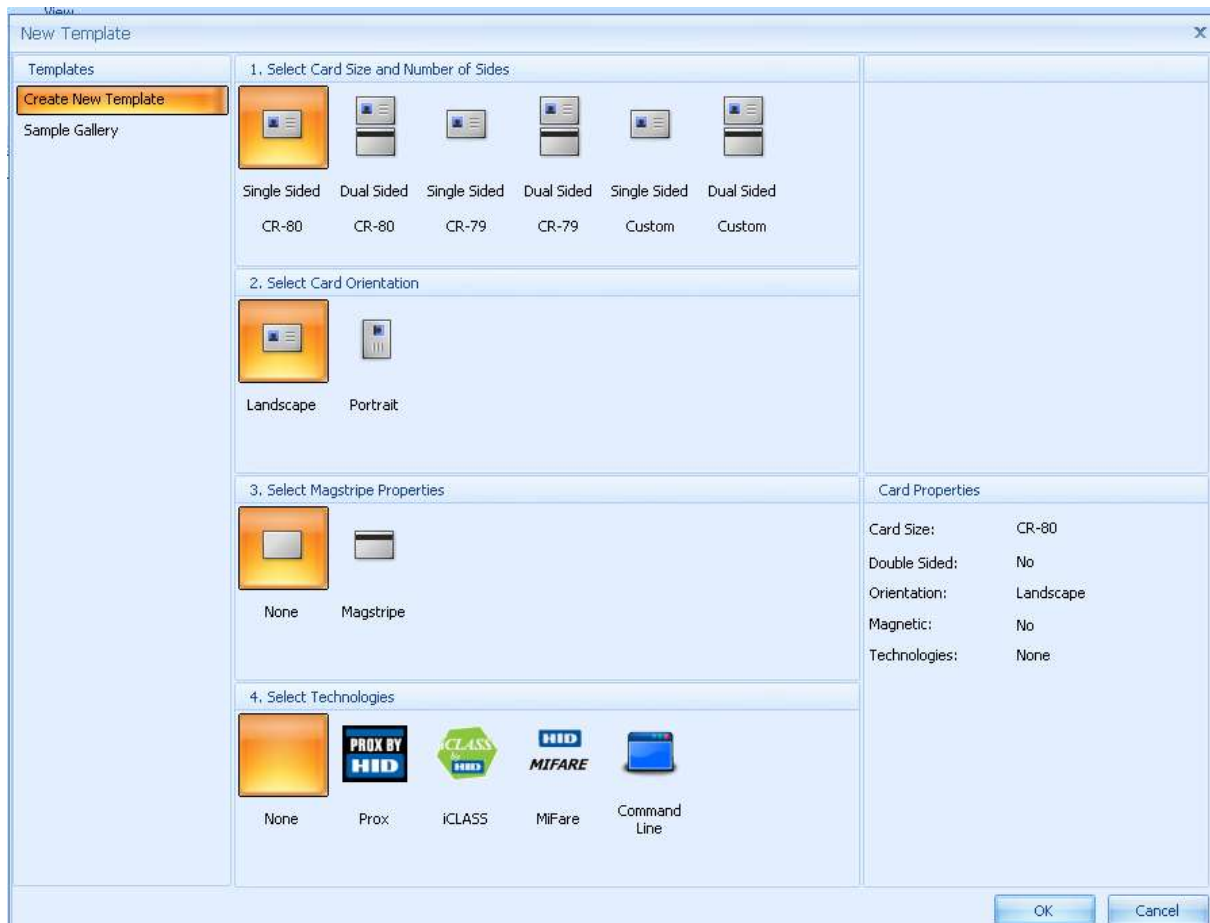
### 4.2.1 Creating a New Template- Card Design



Select **New Template** on the Application dropdown menu to bring up the **New Template** window and access the **Create New Template** or **Sample Gallery** capabilities.

Select the **Card Size**. (**Note:** The magnetic stripe is similar to a barcode and encodes information from your existing data fields.)

Click on **OK** to save your work. Click on **Cancel** to exit without saving your work.





### 4.2.1.1 Selecting the CR-80 Card Size (Single Sided)

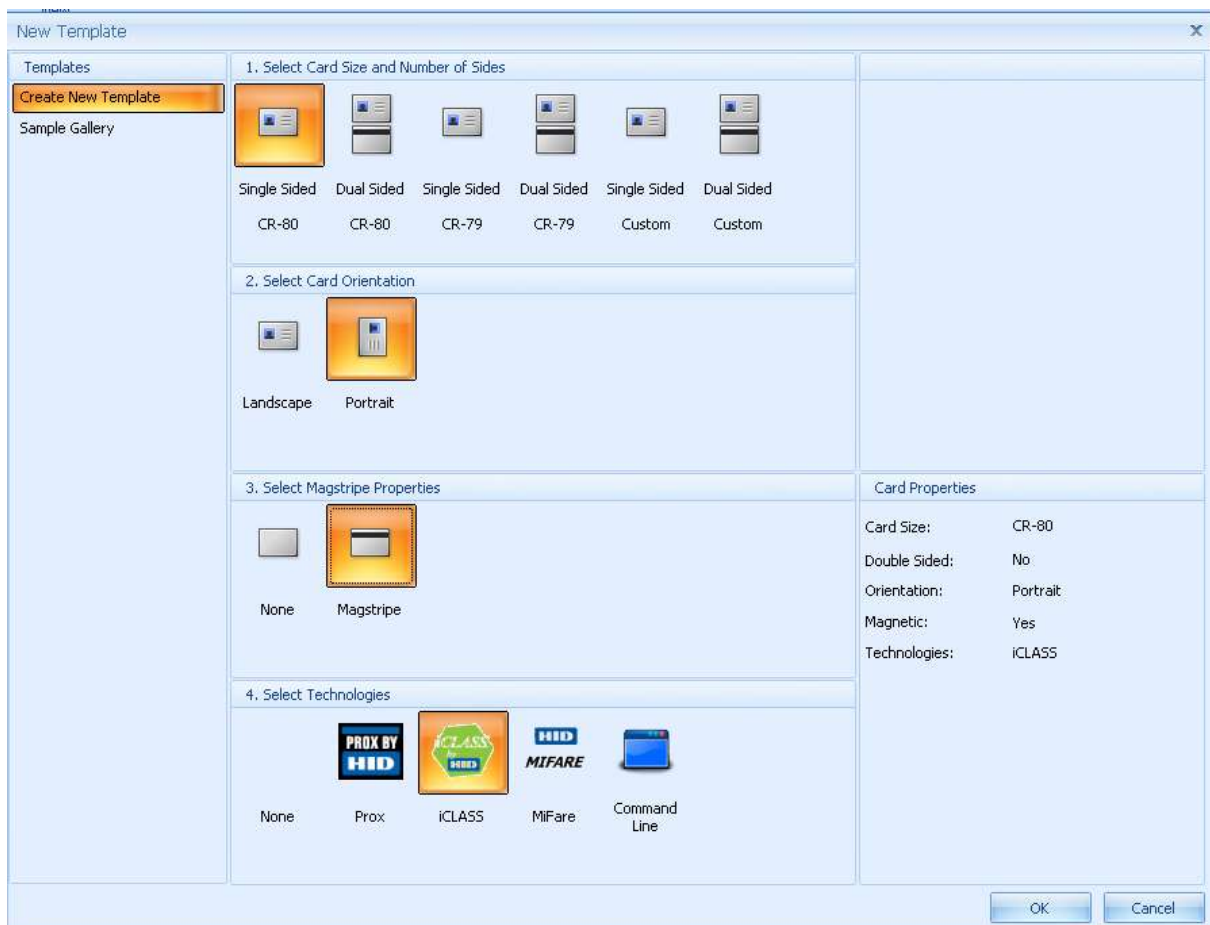
Select the CR-80 (Single Sided) card size to meet your specific card requirements. Here is an example of a selection.

Note the boxes that indicate specific requirements (that need to be met).

Those requirements are indicated under Card Properties in the lower right corner of the window.

C-80 is the typical size of most identification and credit cards.

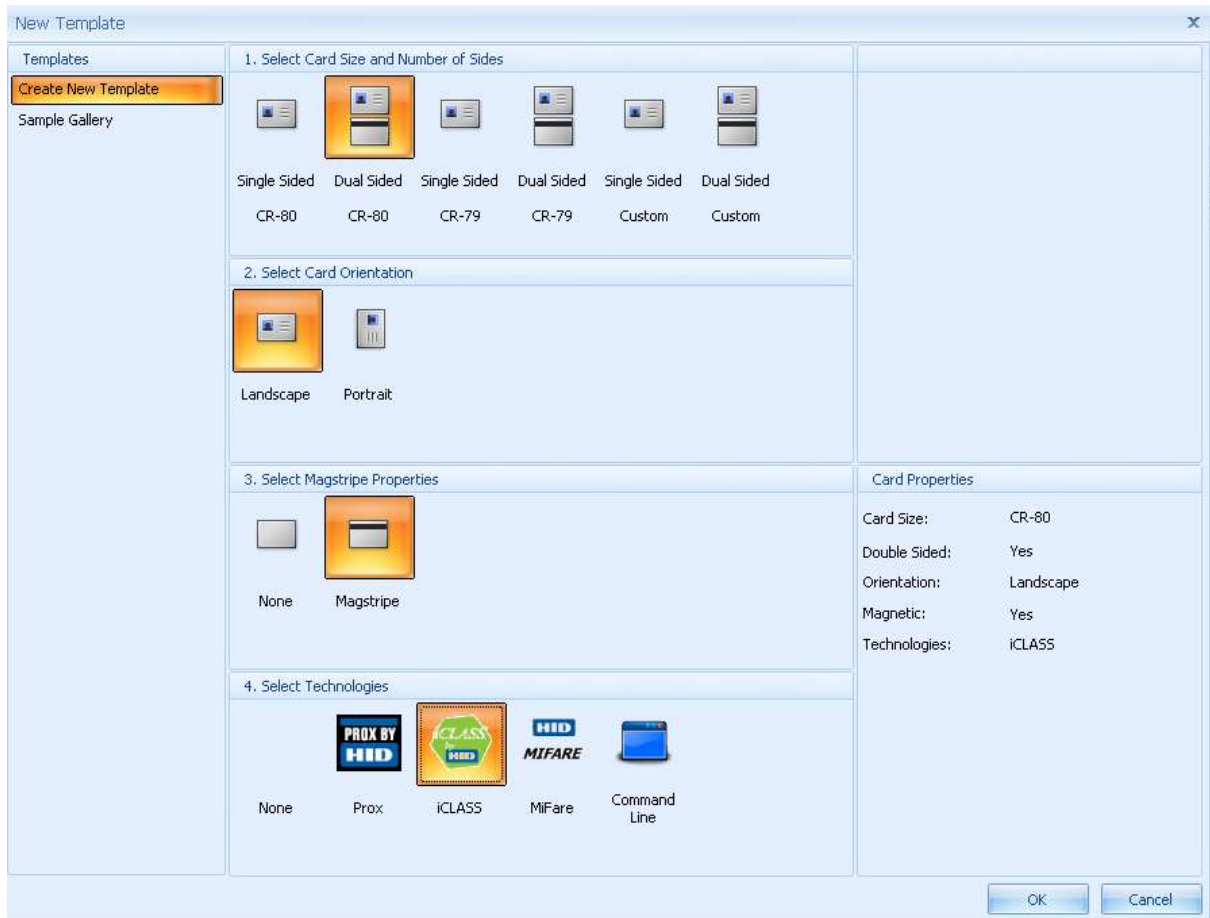
Example – CR-80 (Single Sided, Portrait, Magnetic stripe, and iCLASS)



### 4.2.1.2 Card Size (Dual Sided)

Select the CR-80 (Dual Sided) card size to meet your specific card requirements. Here is an example of a selection. Note the boxes that indicate specific requirements (that need to be met). Those requirements are indicated under Card Properties in the lower right corner of the window.

Example – CR-80 (Dual Sided, Landscape, Magnetic stripe, and HID Prox)



### 4.2.1.3 Selecting the CR-79 Card Size (Single Sided)

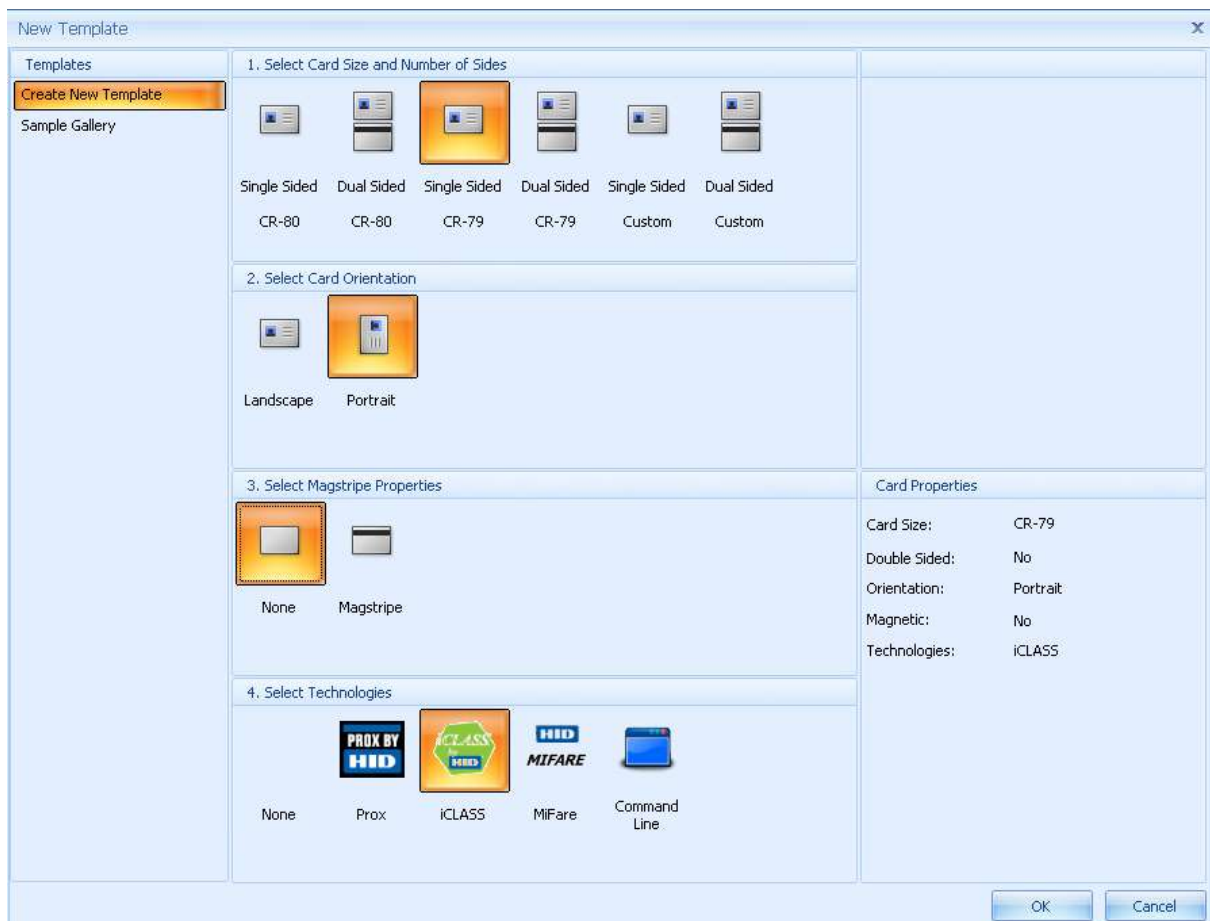
Select the CR-79 (Single Sided) card size to meet your specific card requirements. Here is an example of a selection.

Note the boxes that indicate specific requirements (that need to be met).

Those requirements are indicated under Card Properties in the lower right corner of the window.

CR-79 is slightly smaller than the CR-80 and is usually adhesive-backed.

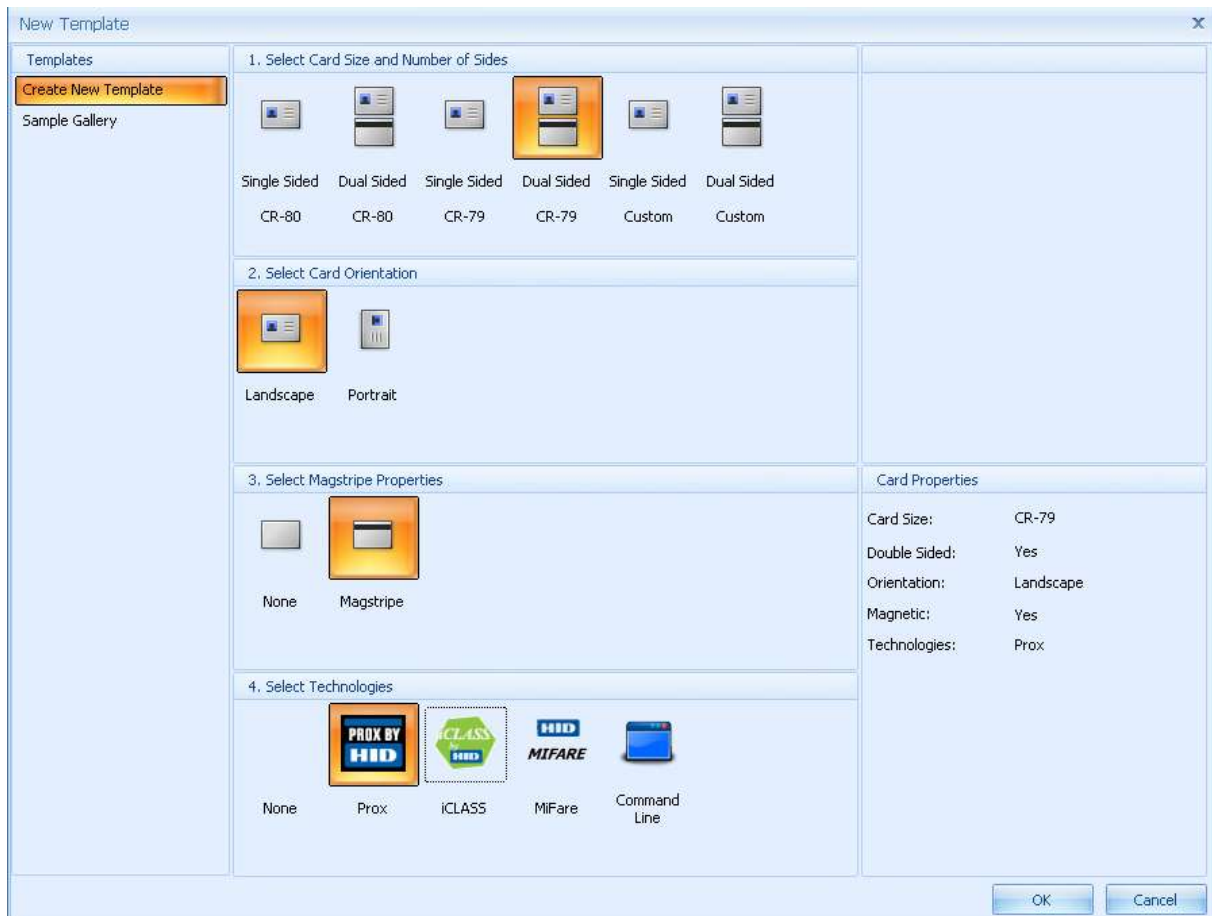
Example – CR-79 (Single Sided, Portrait, None, and iCLASS)



#### 4.2.1.4 Selecting the CR-79 Card Size (Dual Sided)

Select the CR-80 (Dual Sided) card size to meet your specific card requirements. Here is an example of a selection. Note the boxes that indicate specific requirements (that need to be met). Those requirements are indicated under Card Properties in the lower right corner of the window.

Example – CR-79 (Dual Sided, Landscape, Magnetic stripe, and HID Prox)



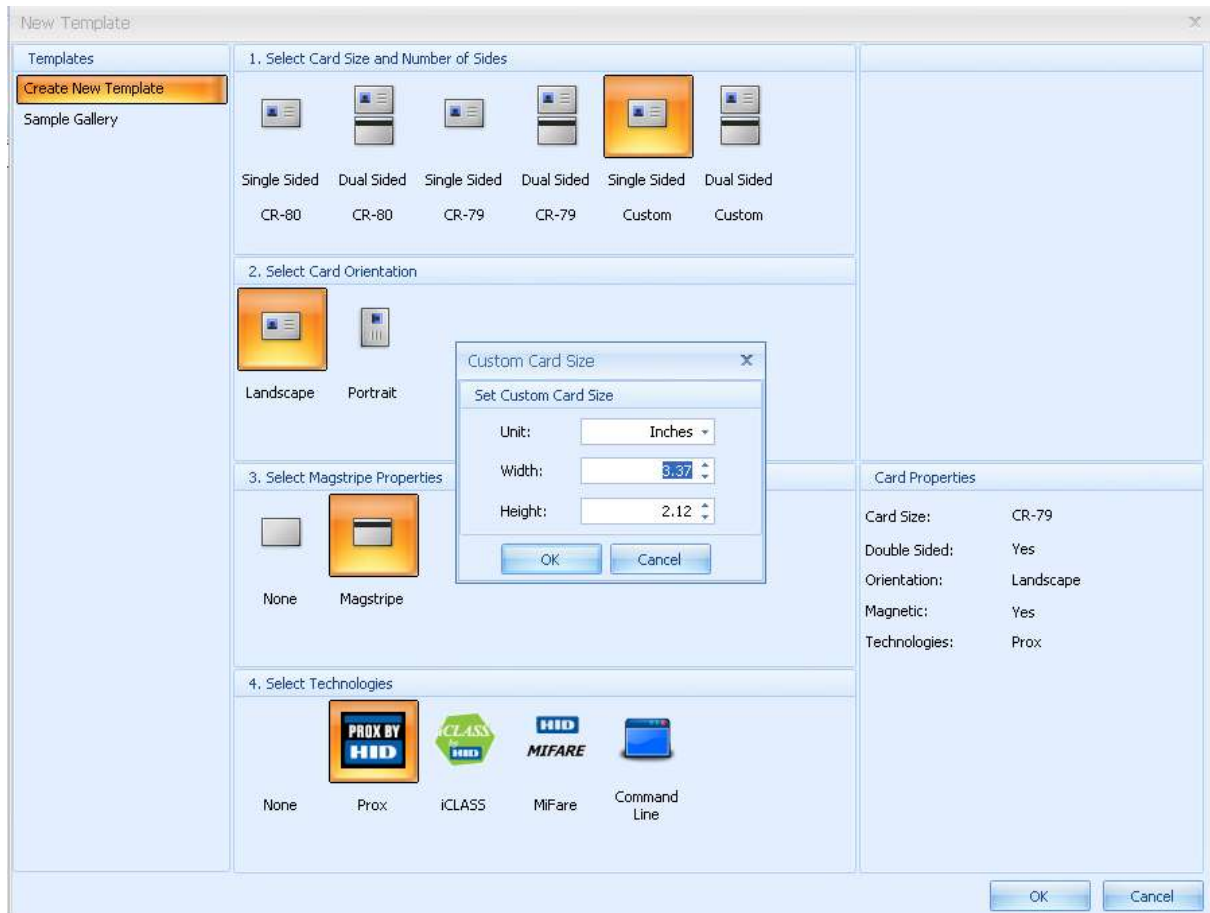
### 4.2.1.5 Selecting the Custom Card Size (Single Sided)

Select the Custom (Single Sided) card size to meet your specific card requirements. Here is an example of a selection.

Note the boxes that indicate specific requirements (that need to be met). Those requirements are indicated under Card Properties in the lower right corner of the window.

Note the Custom Card Size dialog where you specify Unit, Width, and Height for your card requirements.

Example – Custom (Single Sided, Landscape, Magnetic stripe, and HID Prox)



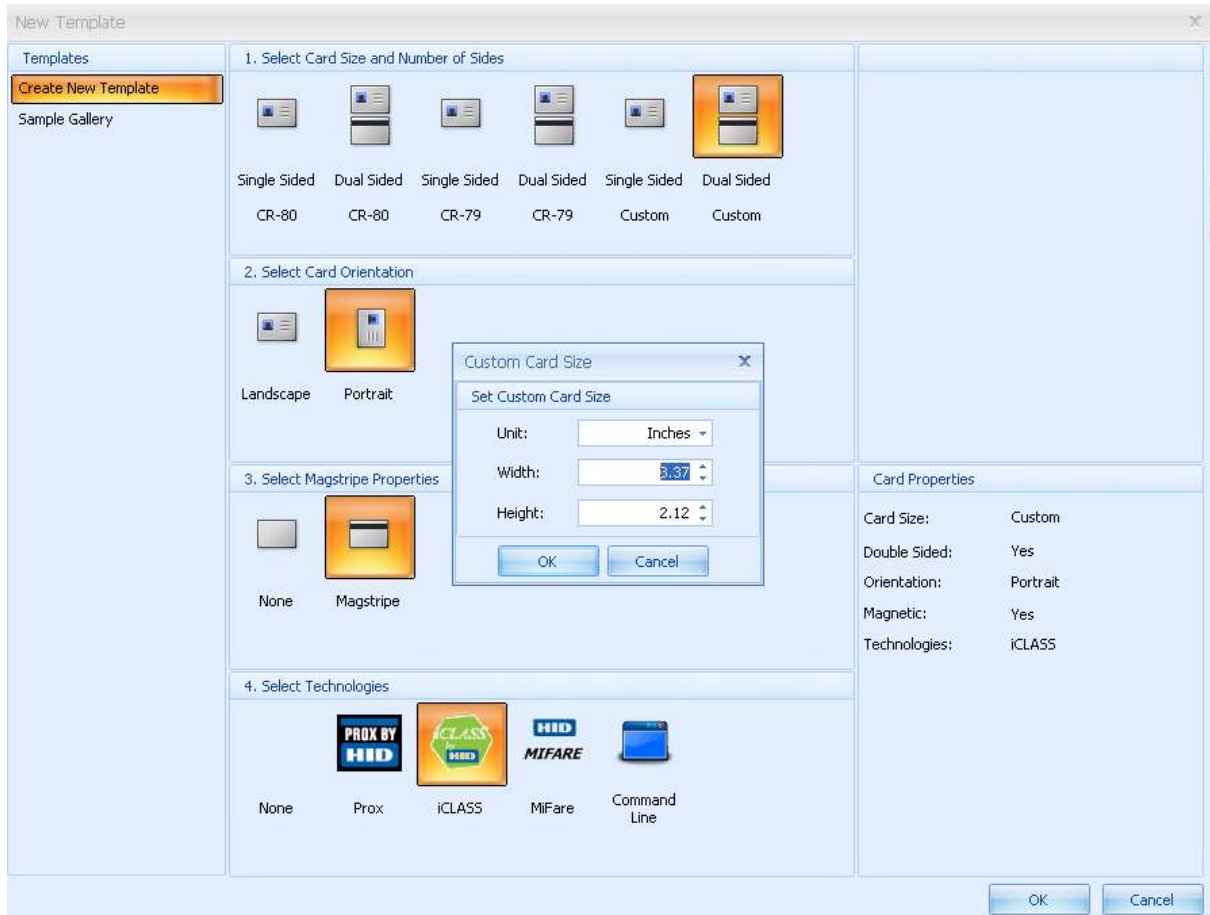
### 4.2.1.6 Selecting the Custom Card Size (Dual Sided)

Select the Custom (Dual Sided) card size to meet your specific card requirements. Here is an example of a selection.

Note the boxes that indicate specific requirements (that need to be met). Those requirements are indicated under Card Properties in the lower right corner of the window.

Note the Custom Card Size dialog where you specify Unit, Width, and Height for your card requirements.

Example – Custom (Dual Sided, Portrait, Magnetic stripe, and iCLASS)



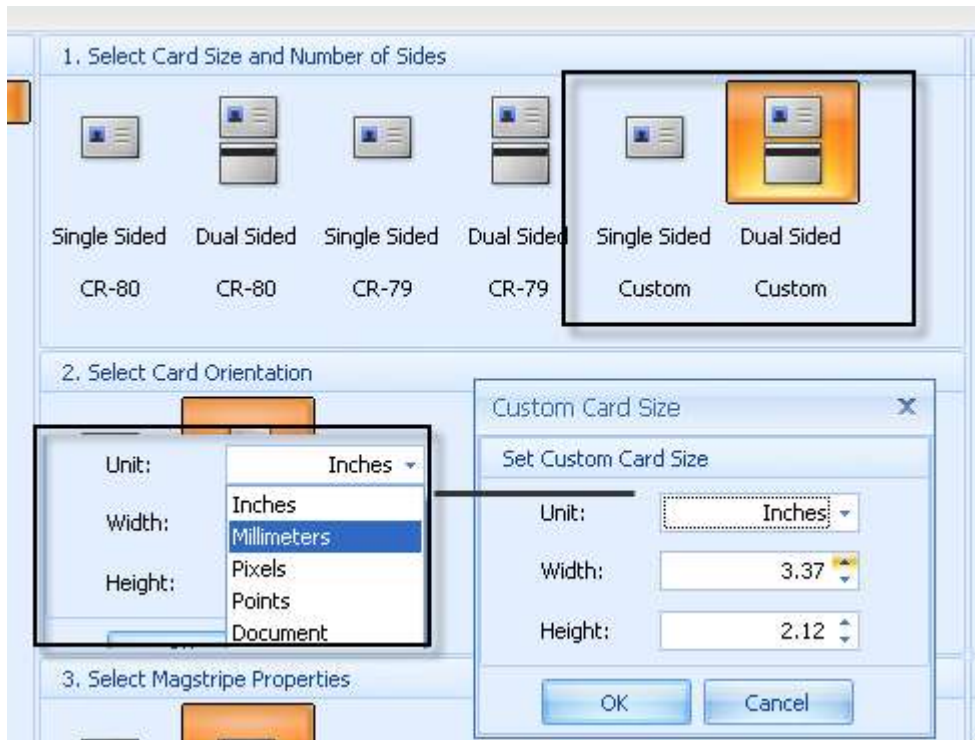
### 4.2.1.7 Selecting Unit, Width, and Height (Custom Card Size)

If you select **Custom**, you will be prompted to set the card size accordingly. You can bring up the same dialog for Single Sided or Dual Sided Custom Card Size.

Select your **Unit** measurement by clicking on the DOWN arrow.

Select your **Width** measurement by clicking on the UP or DOWN arrow.

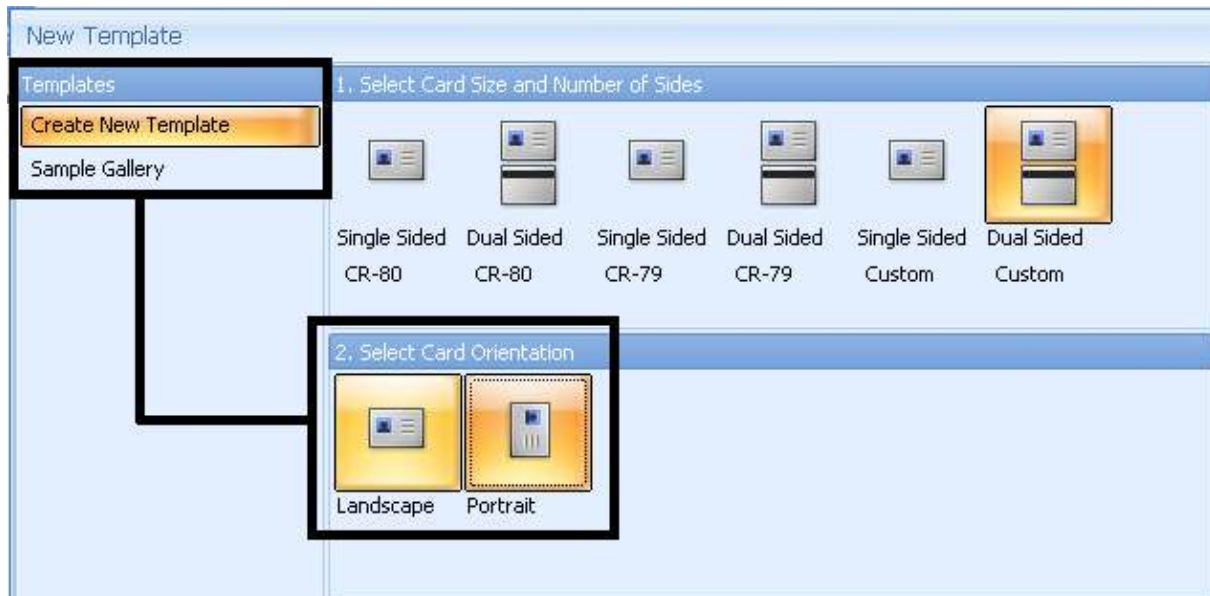
Select your **Height** measurement by clicking on the UP or DOWN arrow.





#### 4.2.1.8 Selecting Card Orientation (Horizontal or Vertical)

Select **Landscape** (horizontal) or **Portrait** (vertical) for your card orientation requirement. Before you make this selection, determine whether you want your card to be designed in a horizontal or vertical presentation.

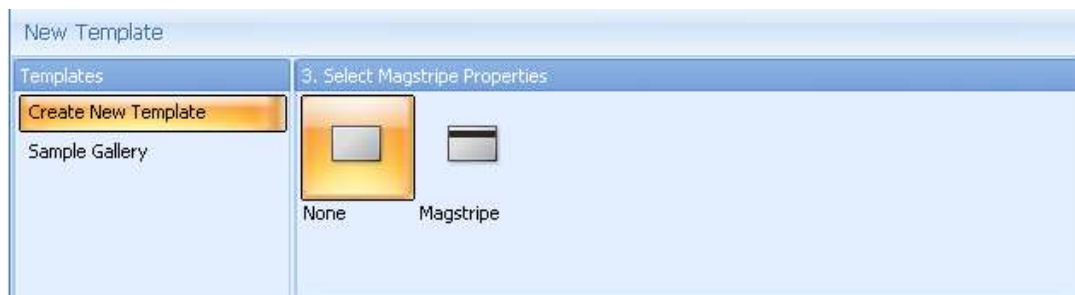


#### 4.2.1.9 Selecting Magnetic stripe Properties (None or Magnetic stripe)

Follow these instructions:

Select **Magnetic stripe** if using magnetic stripe cards. (**Note:** This card type has a magnetic stripe on your card with tracks that contain separate data.)

Select **None** if not using magnetic stripe cards





#### 4.2.1.10 Selecting Technologies (None, HID Prox, ICLASS, MiFare, or Command Line)

Select **None** if you are not using HID iCLASS, Prox, MiFare, or Command Line (Third Party Encoding) cards.



Select **iCLASS** if using a HID iCLASS card or compatible card formats.

Select **HID Prox** for a proximity card or a compatible card format.

Select **MiFare** for a MiFare card or a compatible card format.

Select **Command Line** for a Third Party Encoding card format.

After selecting the correct card the iDIRECTOR wizard will open. See [4.5 iDIRECTOR Access and Usage](#)

#### 4.2.1.11 Confirming Template Changes

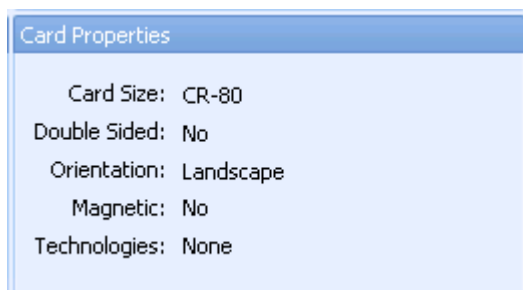
Follow these instructions. (**Note:** This allows you to confirm template changes that are made after you select **New Template**.)

Confirm the template changes under the Card Properties.

Click on **OK**, name and select **Save Template** to save your file.

Click on **Cancel** to exit without saving your work.

View a – Card Properties (lower right corner)



## 4.2.2 Opening an Existing Template

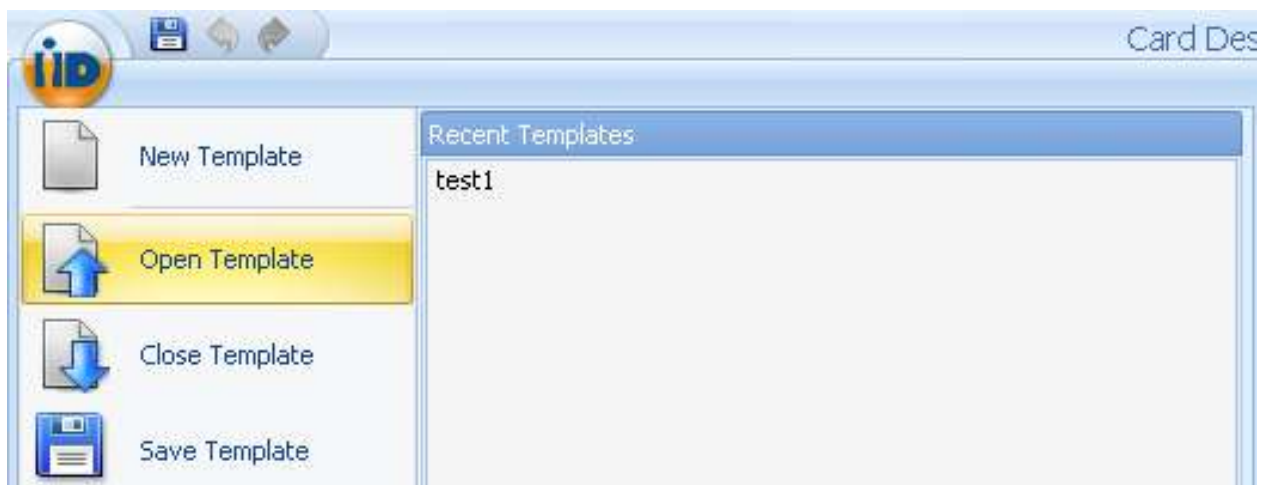
Open Template allows you to select any previously-saved or imported templates. (**Note:** This allows you to work from pre-existing and predefined templates. Be sure and save your work after you make additions to your template.)

Click on the **Application Menu** icon to open the Application Menu.

Click on **Open Template** to bring up the Open Template window and access an existing, predefined template (for your use).

Select the required template and click on **OK** to open up a template file.

Click on **Cancel** to close out the window without accessing a template file.



## 4.2.3 Closing a Template

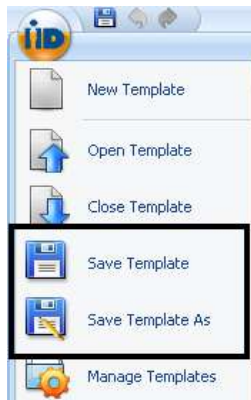
You can close a template by clicking on this icon after saving your template.

## 4.2.4 Saving a Template

Follow these instructions to save your template at any given time. (**Note:** Be sure and save your template periodically to avoid loss if your computer shuts down or locks up.)

Click on the **Application Menu** icon to open the Application Menu.

Click on **Save Template** to bring up the **Save Template** window. (**Note:** This allows you to name (only if not previously named) and to save the Asure ID templates and their files.)

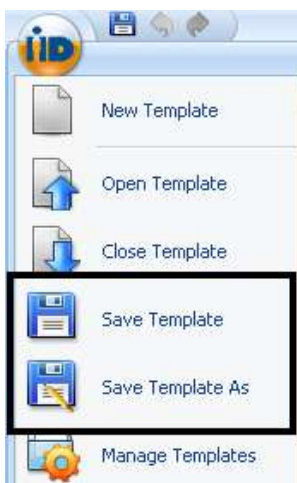


## 4.2.5 Selecting Save Template As

Follow these instructions to save your template at any given time. (**Note:** Be sure and save your template periodically to avoid loss if your computer shuts down or locks up.)

Click on the **Application Menu** icon to open the Application Menu.

Click on **Save Template As** to save a new template or save an existing file as another file name. Click on **Cancel** to close out the window without saving a template file.



## 4.2.6 Managing a Template

Managing a **Template** option allows you to rename or delete a selected template. Follow these instructions to bring up, select, rename, delete or alter a template or templates. (**Note:** This allows you to make changes or additions quickly and efficiently to your templates. Be sure and save your work.)

Click on the **Application Menu** icon to open the Application Menu.

Click on **Manage Template** to bring up the existing template window.

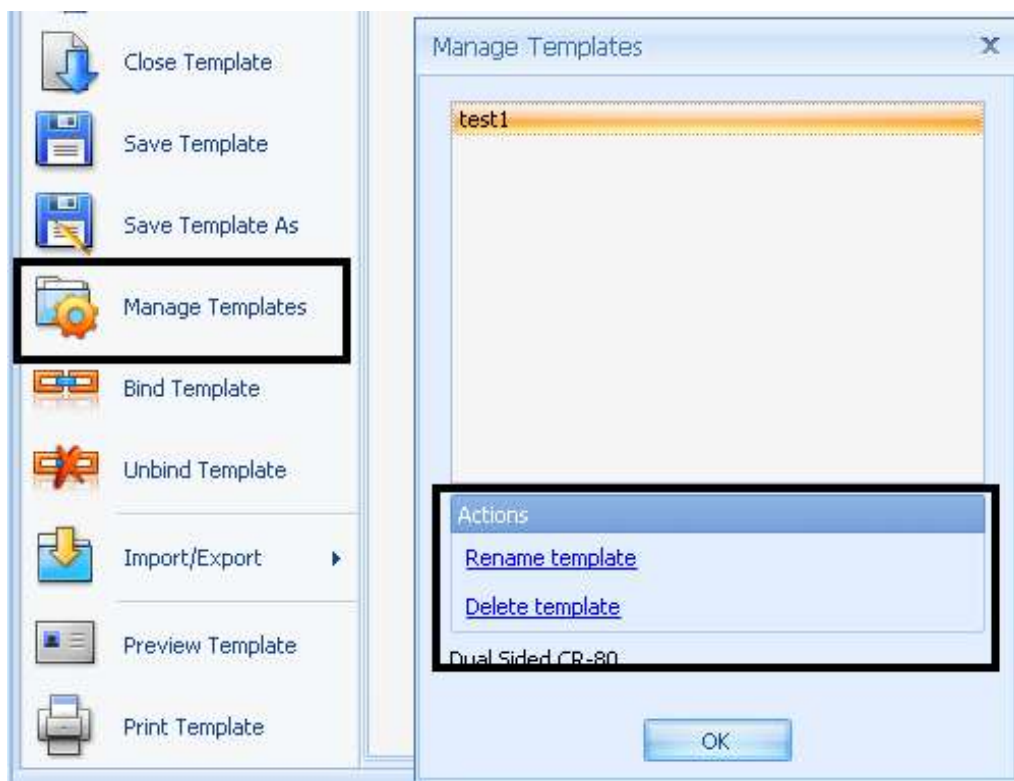
Under **Manage Templates**, select the appropriate template.

Select **Rename template** under **Actions** to rename the template (currently selected). Select **Delete template** under **Actions** to delete the template (currently selected).

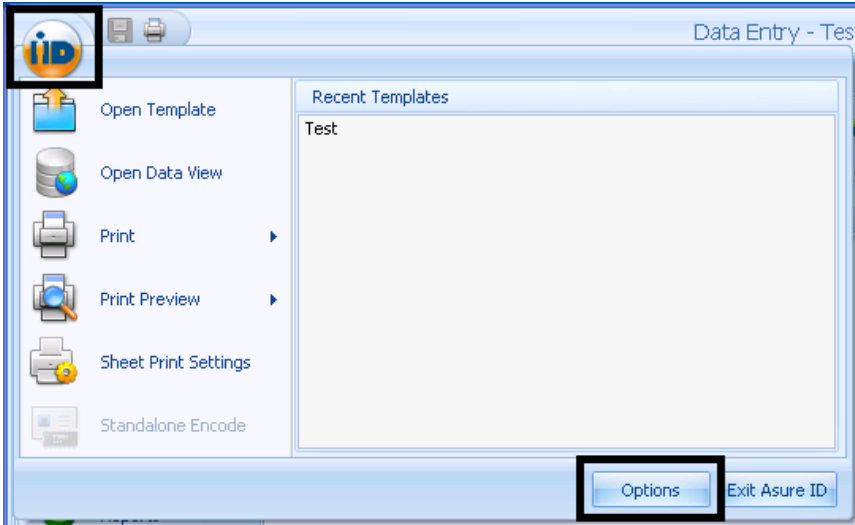
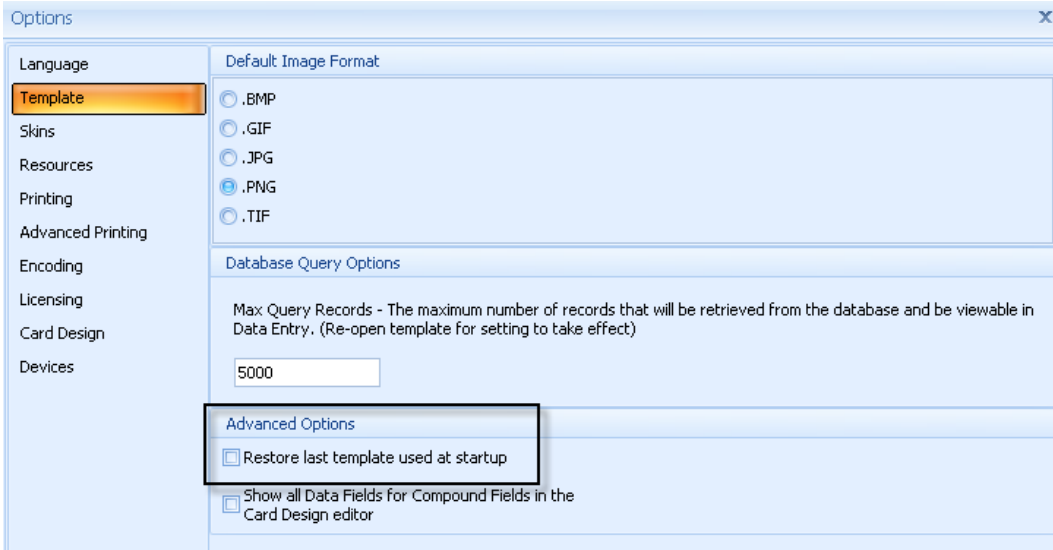
Click **OK** when you complete the procedure.

OR

Click **Cancel** to exit with out saving your work.



### 4.2.6.1 Setting up Asure ID (to load the last template on startup)

Step	Procedure
1	<p>Open Asure ID 7 and go to the <b>Options</b> menu.</p> 
2	<p>Choose the required <b>Template</b> in the column on the left side.</p> <p>Under Startup options, check the box for Restore last template used at startup.</p> 

## 4.2.7 Using the Bind and Un-Bind Template Option

**Template Binding** is the act of linking to data from another Template.

The purpose is to increase data consistency and reduce the number of times that the same data must be entered.

A good example would be a School ID Card Template that contains a student ID, Name and Photo and a School Parking Permit Template. (**Note:** This contains the same ID, Name and Photo, but with a totally different card layout/graphics.)

Step	Procedure
1	The types of objects (that can be bound) include the following: Data Fields Compound Fields Photos Signatures
2	In order to bind to a template, that template must have at least one (1) non-LiveLink Data Field defined; it must have been previously opened in Data Entry (so the Data Fields have been created in the card database). If the template has not been opened previously and you attempt to bind to it, you will be prompted to open the template in Data Entry and then try again to bind to it.
3	When binding to a template, all the non-LiveLink Data Field will be copied from the Parent template to the Child template and the proper linkages will be set up in the Advanced Data Field Properties for each field to connect to the Parent. These linkages will be designated by a DataSource called "Template Bind".
4	Child Templates can contain Data Fields that are <i>not</i> bound to the Parent Template. These will be created in the Native database.
5	Once a template has been bound to, the bound Data Fields cannot be deleted from the Parent, until all Child Templates are "Unbound". The Parent Template cannot be deleted until all of its Child Templates have been "Unbound". Child Template Data Fields and Child Templates themselves can both be deleted at any time. The act of Unbinding a Template will cause the link to the Parent Template to be severed; also, it will make the Native database the Primary DataSource for the formerly bound Data Fields.
6	a Template that is already bound to another Parent Template, cannot be bound to by other Templates. ( <b>Note:</b> Basically, a Child Template cannot be used as a Parent Template.)

Step	Procedure
7	Open the BIND Template from the Application icon. Select the <b>Template to Bind</b> .  Select the fields to BIND and delete the fields not needed for your application. Save this template with a different name.
8	In Data Entry, the fields (you retained) will show up and will be filled with the appropriate data.

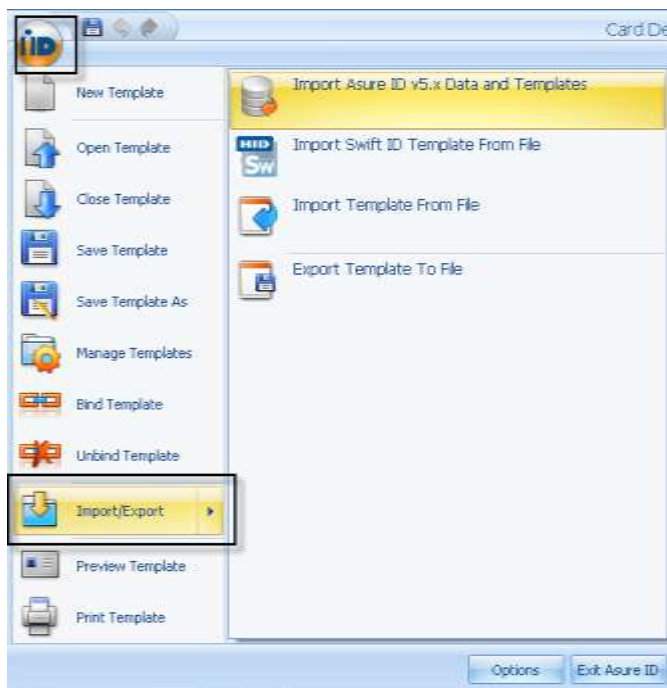
### 4.2.8 Selecting the Import/Export option

Follow these instructions. (**Note:** This option allows you to choose one of four options relating to your templates.)

Click on the **Application Menu** icon to open the Application Menu.

Click on **Import/Export** to bring up the selection window.

Select Import Asure ID 5.X Data and Templates, Import a Template, Import a Swift ID Template or Export a Template from the four choices, as shown below.



## 4.2.9 Selecting Import Asure ID 5.X Data

Follow the instruction for **Import Asure ID 5.x** by clicking on this Welcome screen. (**Note:** This wizard will guide you through upgrading your templates and data for use with Asure ID 6.)

Click **Next** to continue.



Select your Import Source by choosing a Source for importing templates and/or data.

Click on the **From File** radio button to select an exported Asure ID 5.x Template (to import).

Click on the **From Database** radio button to select an existing Asure ID 5.x Database (to import).

Click on **Next** to continue.



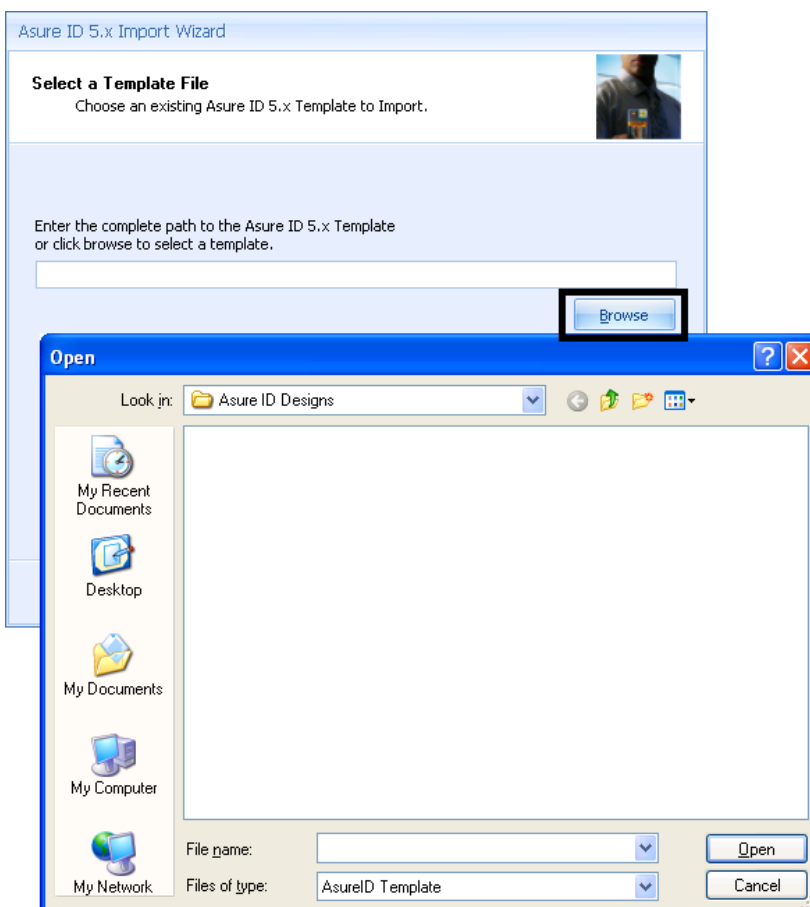


Select a Template file by choosing an existing Asure ID 5.x template to import.

Enter the complete path to the Asure ID 5.x Template.

Click on **Browse** to select a template. (**Note:** You must **select** a template in order to continue with this process.)

Click **Next** to continue



### 4.2.9.1 Selecting Import Template from Swift ID

Asure ID has the ability to import templates that were created by Swift ID, the integrated badging application in the DTC1000/4000/4500 card printers, into an Asure ID template.



Click on the Application Menu icon to open the Application Menu.

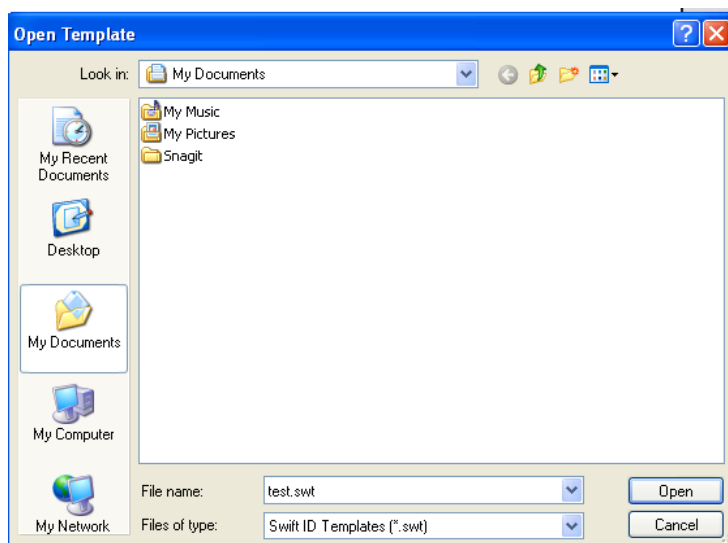
Select a file from the Import Swift ID Template from File.

Then select your (.swt) file.

Click on Open to view the file.

From here minor changes may be made.

Save the template.



### 4.2.9.2 Selecting Import Template from File

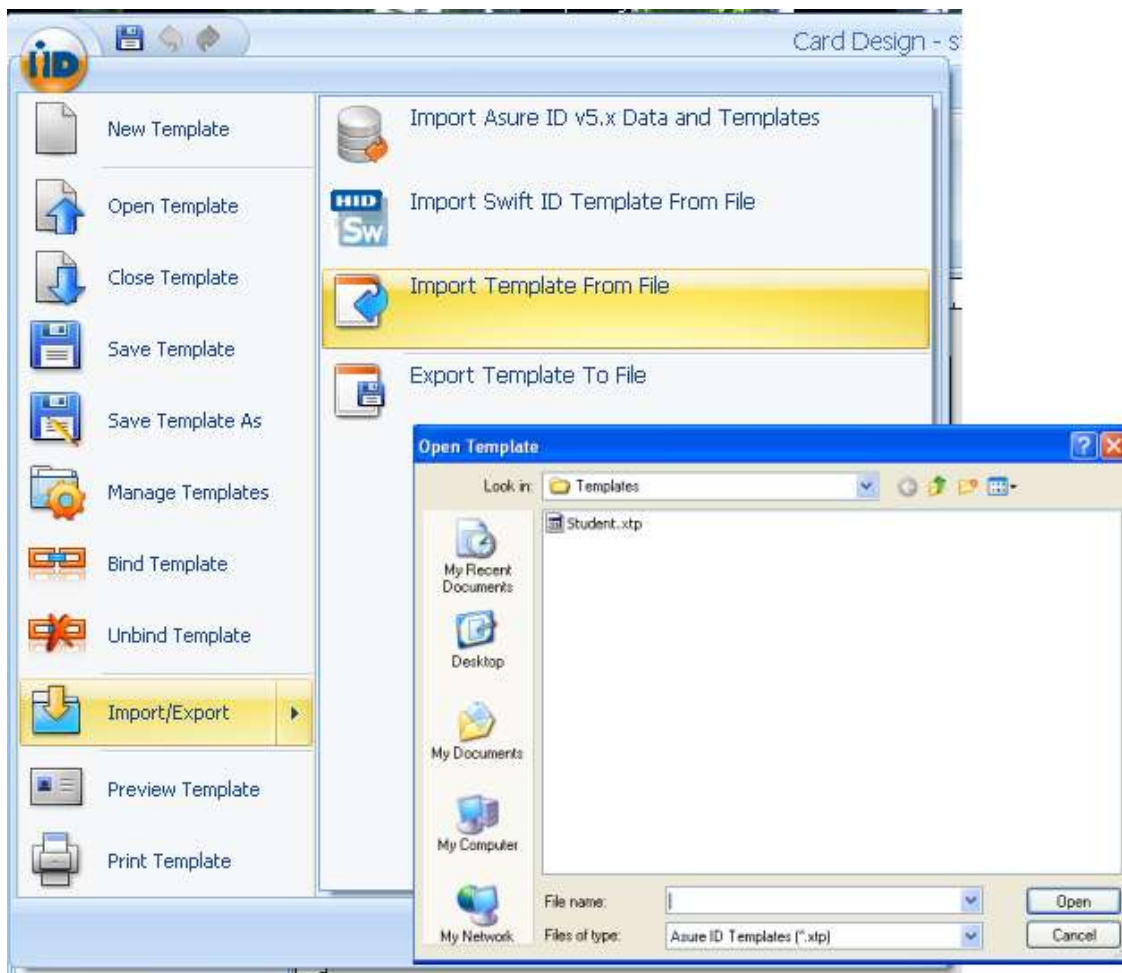
Follow these instructions to import a pre-existing and predefined template from a designated folder. (**Note:** This allows you to make changes, corrections, and additions to existing templates in a quick, efficient manner.)

Click on the **Application Menu** icon to open the Application Menu.

Select a file from the **Import Template from File**, as shown below.

Then select your (.xtp) file.

Click on **Open** to view the file.



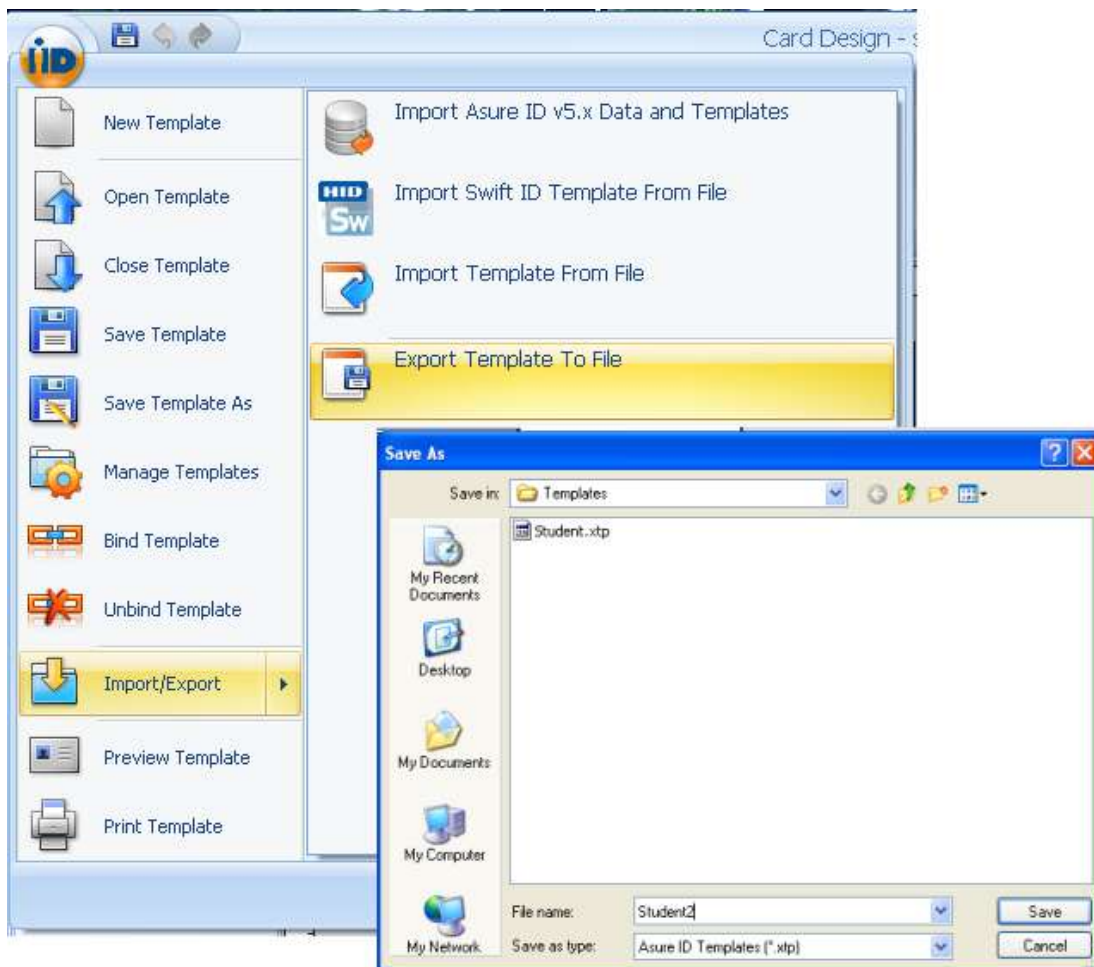
### 4.2.9.3 Selecting Export Template to File

Follow these instructions to export a template from an existing folder. (**Note:** This allows you to make changes, corrections, and additions to existing templates in a quick, efficient manner.)

Click on the **Application Menu** icon to open the Application Menu.

Select the file to export.

Click on **Save** to export the file.



## 4.2.10 Previewing a Template

Follow these instructions to review your template or templates. (**Note:** This allows you to thoroughly inspect each template for corrections, additions, upgrades, and changes.)

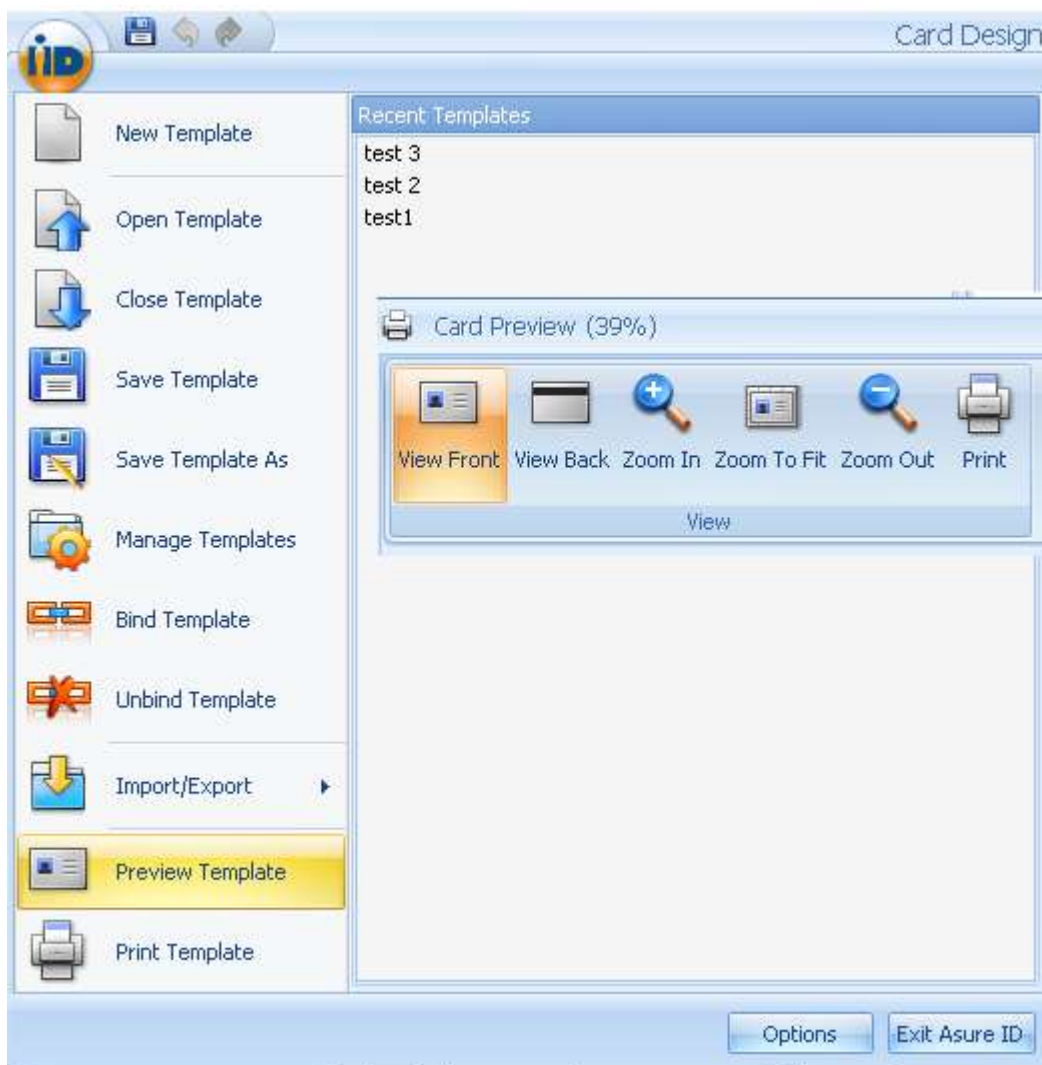
Click on the **Application Menu** icon to open the Application Menu.

Click on **Preview Template** to bring up the Card Preview window.

Select **View Front**, **View Back**, **Zoom In**, **Zoom to Fit**, **Zoom Out** or **Print** (as needed). (**Note:** This window is for preview only and is not active to make changes.)

If you select **Print**, the file will be sent to the default printer. (**Note:** This is for previewing only.)

Close the preview window from the upper right **X** when finished.



## 4.2.11 Printing a Template

Follow these instructions to test how the template will look at review time. Follow these instructions to print a template. (**Note:** The completed card is printed in the Data Entry section after all the information has been added.)

Click on the **Application Menu** icon to open the Application Menu.

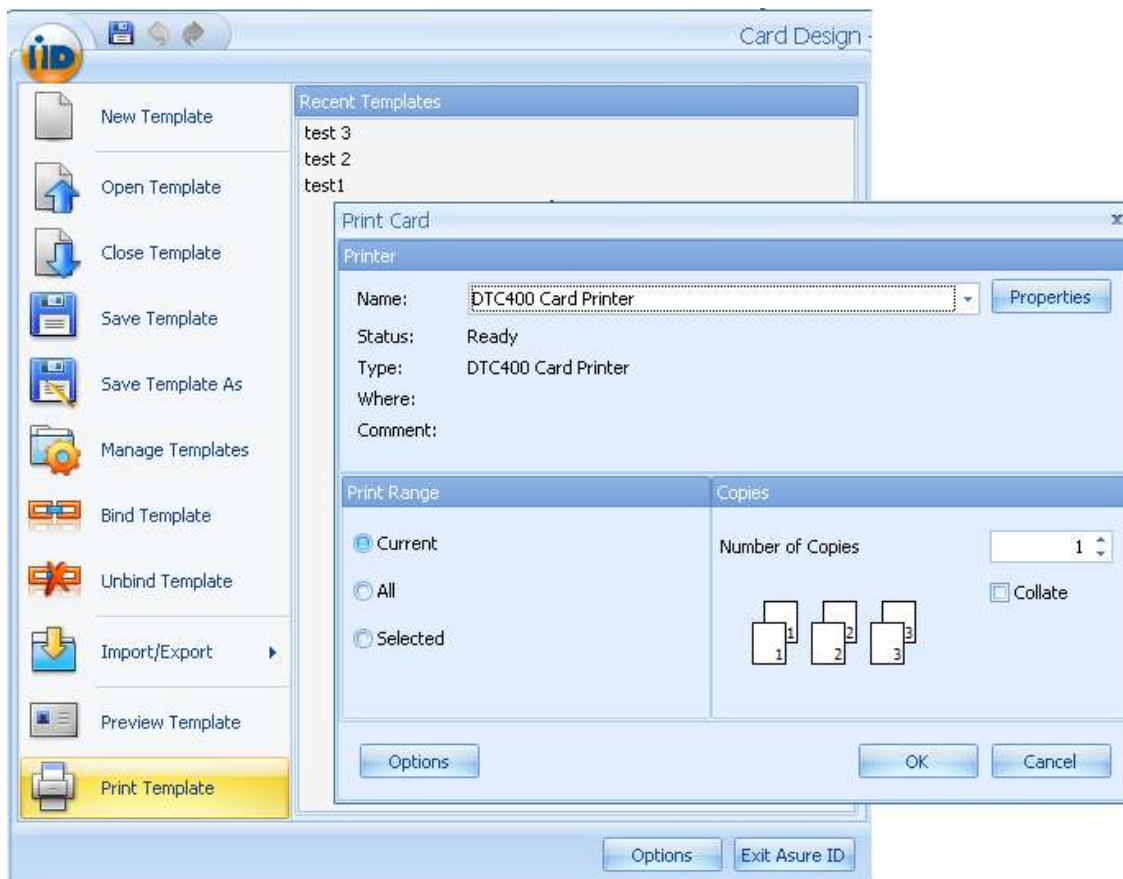
Select the desired Template from the Recent Template window.

Click on **Print Template** to bring up the Print window.

Click on the dropdown printer arrow and select the **Printer** option.

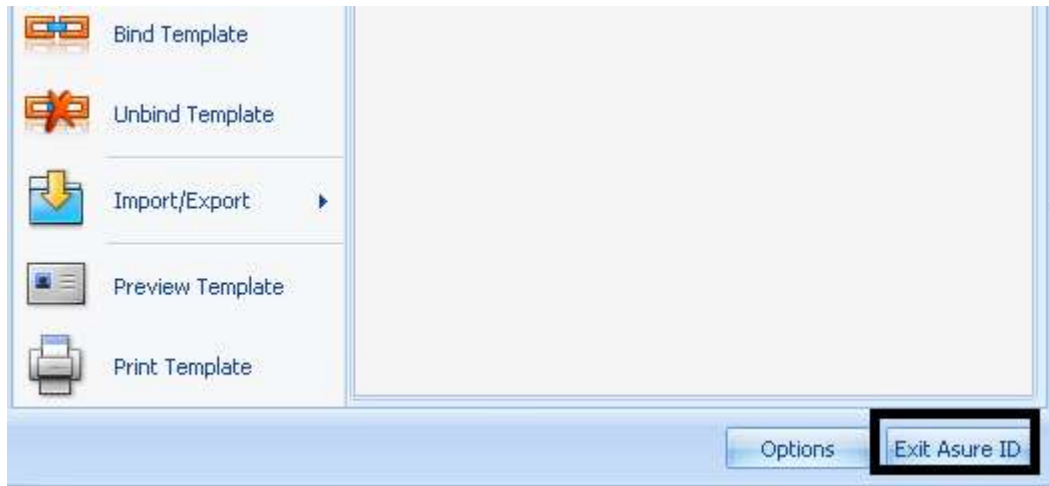
Set up the Properties for the Printer Driver.

Click on **OK** to print.



## 4.2.12 Exiting Asure ID (System Options)

**Caution:** This selection terminates the execution or closes the program for Asure ID. See the **Exit Asure ID** button in the lower right corner of the window.





## 4.3 Home Tab

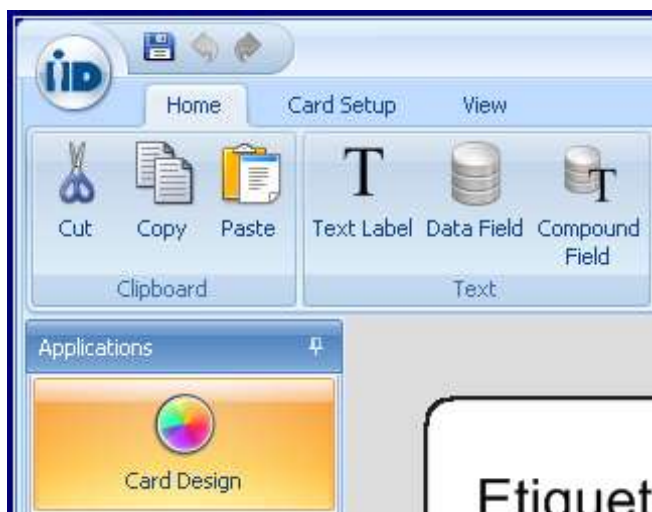
The Home tab allows you to configure how that user data will be displayed.

The Table view (shown above) is the default view and is used to show all users and all user settings.

The Record view (shown below) is used to show individual records, either in a “carousel” view or in a single row view:

Both views allow you to scroll through the data records and edit the appropriate data for the user’s profile similarly to the table view.

Select the required option by clicking on the Menu Bar icon then on the card. The property window will appear for editing. Using the items on the Home tab, you can perform these functions. Highlight the icon for the definition of each function.



Each is described below.

The Clipboard offers the Cut, Copy and Paste options.

The Text offers the Text Label, Data Field and Compound Field used to edit the card.

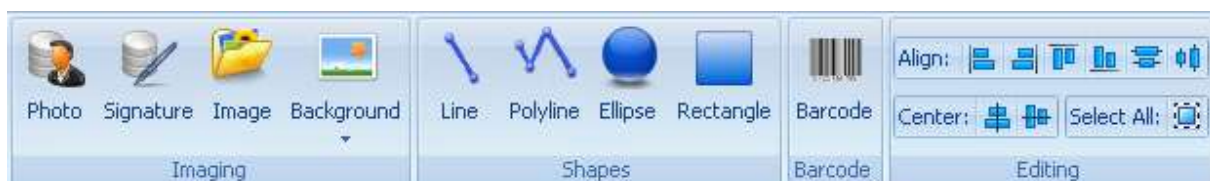
The Imaging offers the Photo, Signature, Image and Background options.

The **Shapes** offers four (4) different drawing tools.

The **Barcode** offers options to set up the Bar Code on the card.

The **Editing** offers tools for object placement.

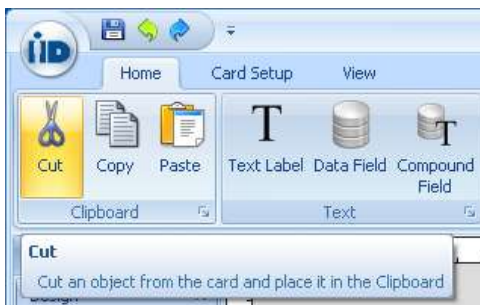
These options are used by clicking on the icon and then on the card surface. (**Note:** This brings up the properties menu for editing.)





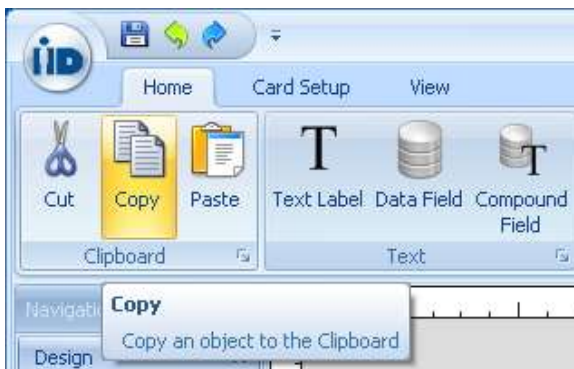
## 4.3.1 Copying an Object to Clipboard

### Cutting and Removing an Object from the Card Template



### 4.3.1.1 Copying an Object to Clipboard

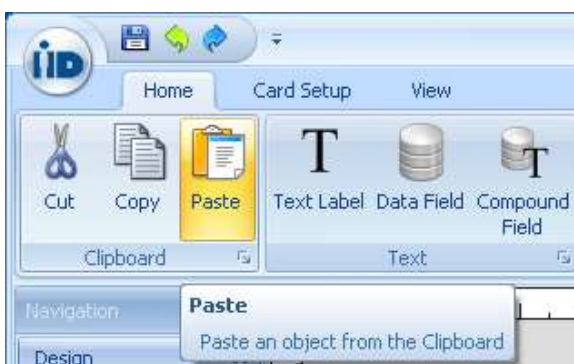
This can be used for duplicating an existing object on the Card Template.



### 4.3.1.2 Pasting an Object from Clipboard

These two functions (above and below) can be used for copying and pasting an image from another application.

Once an object has been cut or copied to the clipboard, place your cursor where you want it inserted and press the **Paste** icon.



### 4.3.1.3 Adding Text Fields

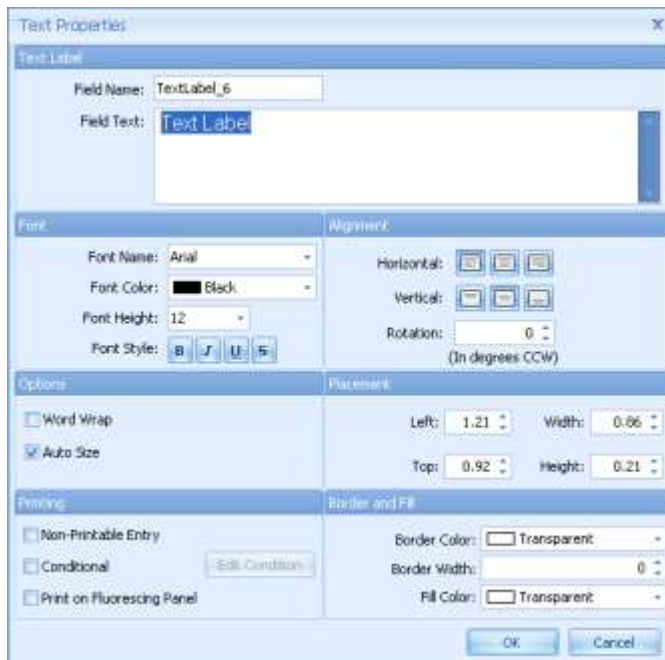
You can use the **Text Label** object to place static text on the card. (**Note:** Static text is fixed and is not variable.) Select Text Label and click on card to place and find the properties box. Set properties as needed.

Select the **Text Label**. Click on the card drawing surface and drag the text box to the desired size. When the mouse button is released, the application will then display the Properties window.


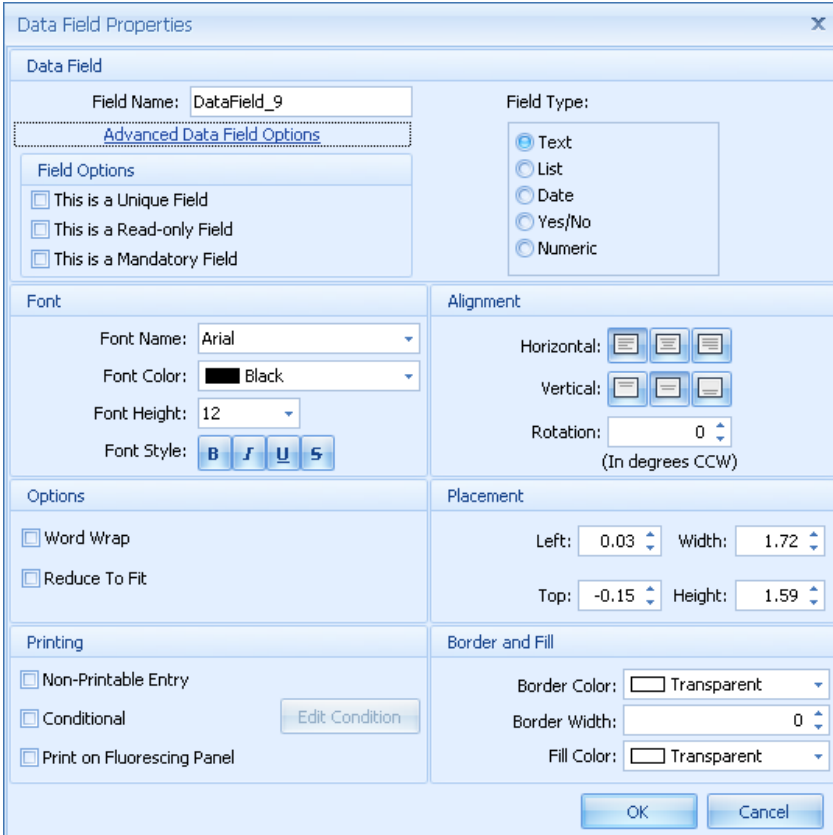
At this point, you can enter the static text inside the Field Text box. In addition, you can set other properties of the text box by choosing the appropriate fields that are displayed by this window.

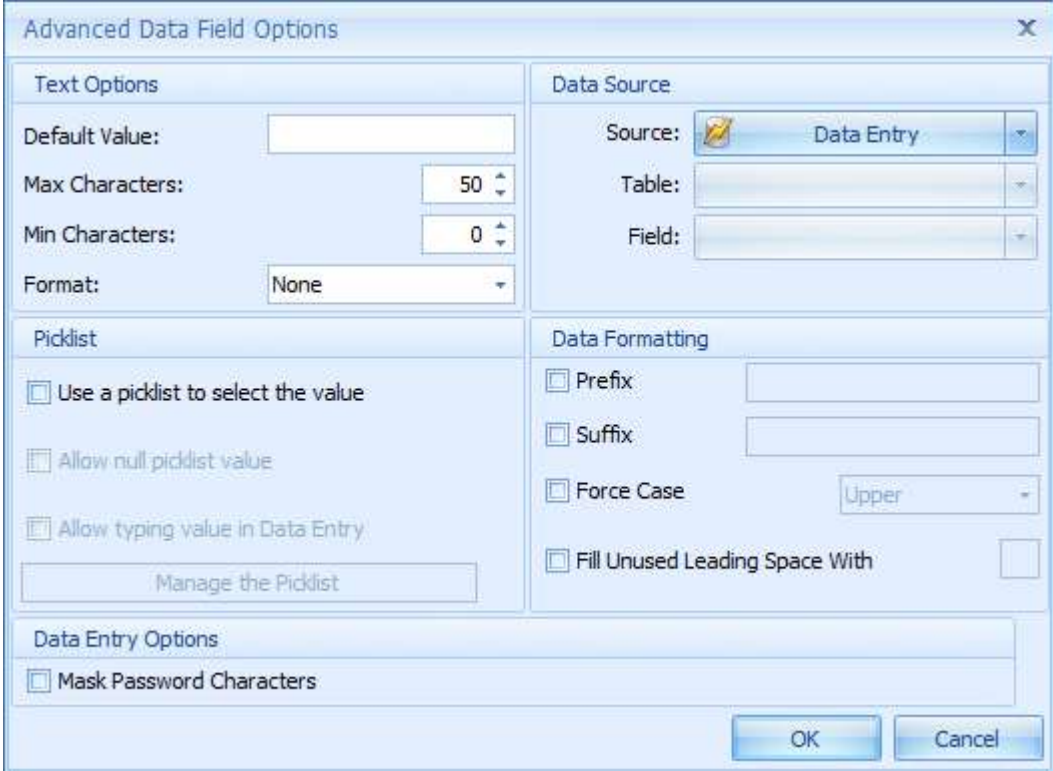
After all options have been set correctly, you can return to the Card Design application by clicking on the **OK** button.

This may be a Non Printable Entry, Conditional or to be printed with the Fluorescing Panel of the ribbon.



### 4.3.1.4 Masking Data Field Characters

Step	Procedure
1	<p>In the Data Field Properties window, select the <b>Advanced Data Field Options</b> window. See below.</p>  

Step	Procedure
2	<p>Check the box for <b>Mask Password Characters</b>, located at the bottom of the Advanced Data Field Options window. See below.</p> 

### 4.3.2 Adding Image Fields

The four (4) types of images (that can be added to the card design) are Portraits, Signatures, the images from files, and Backgrounds.

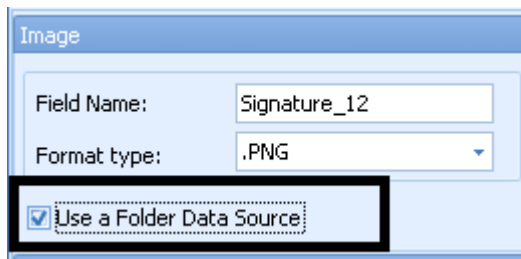
The image files for the Photo or the Signature may come from the Data Entry database OR from files on the local PC file system. A checkbox will be provided on the Photo and Signature properties dialogs, which will hide the normal Data Source configuration controls and activate the controls for configuring a Folder Data Source.

The folder path will be chosen by the user in the Photo and Signature properties dialogs. This offers the ability to store captured photos externally and save them to the local drive.

The name of the Photo or image that will be associated with a folder image will be based another field on the template. Choose this field from a dropdown list on the Photo and Signature properties dialogs.

You can use the **Folder Data Source** button to select the path from a standard Windows Folder Browser Dialog. (**Note:** The Folder Data Source will not need to be configured in the Data Source Wizard like the other Data Sources in Card Design. The format of the image that will be used when an image is captured or loaded into Data Entry and saved will also be configured in the Photo or Signature properties dialog via a dropdown list.)

See from below for each setup procedure.



### 4.3.2.1 Adding a Photo

You can use the Portrait object to add a photo to the card template design. To begin the process, select the Portrait object in the Ribbon.



Follow these instructions.

Click on the **Photo** icon and then on the card drawing surface and drag the box to the desired size.

When the mouse button is released, the application will then display this window. At this point, you can set the properties of the Portrait Field, including the source of the data used for the image.

In addition, you can set other properties of the Portrait by choosing the appropriate fields that are displayed by this window.

Select the Data Source or the Folder Data Source to retrieve the photos depending on where they are located.

After all options have been set correctly, you can return to the Card Design application by clicking on the **OK** button.

DISPLAY A: DATA SOURCE will retrieve images from the database when in the Data Entry application.

The screenshot shows the 'Photo Properties' dialog box with the 'Data Source' tab selected. The 'Image' section has 'Field Name' set to 'Photo\_1' and 'Format type' set to '.PNG'. The 'Options' section has 'Maintain Aspect Ratio' checked. The 'Placement' section has 'Left' at 2.00, 'Width' at 0.97, 'Top' at 0.20, 'Height' at 1.17, and 'Rotation angle (CCW)' at 0°. The 'Border and Fill' section has 'Border Color' set to 'Black' and 'Border Width' set to 2. The 'Rounded Corners' section has 'Width' and 'Height' both set to 0.00. The 'Data Source' section has 'Source' set to 'Data Entry', 'Table' set to 'Data Entry', and 'Field' set to 'Clone Data Source'. The 'Printing' section has 'Non-Printable Entry', 'Conditional', 'Print on Fluorescing Panel', and 'Mandatory Entry' all unchecked.

DISPLAY B: FOLDER DATA SOURCE will retrieve images from the local file system.

The screenshot shows the 'Photo Properties' dialog box with the 'Folder Data Source' tab selected. The 'Image' section has 'Field Name' set to 'Photo\_1' and 'Format type' set to '.PNG'. The 'Options' section has 'Maintain Aspect Ratio' checked. The 'Placement' section has 'Left' at 2.00, 'Width' at 0.97, 'Top' at 0.20, 'Height' at 1.17, and 'Rotation angle (CCW)' at 0°. The 'Border and Fill' section has 'Border Color' set to 'Black' and 'Border Width' set to 2. The 'Rounded Corners' section has 'Width' and 'Height' both set to 0.00. The 'Folder Data Source' section has 'Select a folder which will contain the images for these photos' with a 'Browse...' button. The 'Path' field is empty, and the 'Key Field' is set to 'Record ID (default)'. The 'Printing' section has 'Non-Printable Entry', 'Conditional', 'Print on Fluorescing Panel', and 'Mandatory Entry' all unchecked.



### 4.3.2.2 Adding a Signature

The Signature object is used to add a bitmap of a signature to the card template design. To begin the process, you would select the Signature object in the Menu Bar.

Click on the **Signature** icon; then click on the card drawing surface and drag the box to the desired size. (**Note:** When the mouse button is released, the application will then display this Properties window.)

Select the Data Source or the Folder Data Source to retrieve the signatures depending on where they are located.



At this point, you can set the properties of the Signature Field, including the source of the data used for the image.

In addition, you can set other properties of the Signature by choosing the appropriate fields that are displayed by this window.

After all options have been set correctly, you can return to the Card Design application by clicking on the **OK** button.



DISPLAY A: DATA SOURCE will retrieve images from the database when in the Data Entry

The screenshot shows the 'Signature Properties' dialog box with the 'Data Source' tab selected. The 'Image' section has 'Field Name' set to 'Signature\_1' and 'Format type' set to '.PNG'. The 'Data Source' section shows 'Source' as 'Data Entry', 'Table' as 'Data Entry', and 'Field' as 'Clone Data Source'. The 'Options' section includes 'Maintain Aspect Ratio' (checked), 'Transparency' (0), 'ChromaKey' (0), and 'Invert Image'. The 'Placement' section shows 'Left' (0.30), 'Width' (1.54), 'Top' (1.60), 'Height' (0.26), and 'Rotation angle (CCW)' (0°). The 'Printing' section includes 'Non-Printable Entry', 'Conditional' (with an 'Edit Condition' button), 'Print on Fluorescing Panel', and 'Mandatory Entry'. The 'Border and Fill' section shows 'Border Color' as 'Black' and 'Border Width' as '2'. The 'Rounded Corners' section shows 'Width' (0.00) and 'Height' (0.00). The 'OK' and 'Cancel' buttons are at the bottom right.

application.

DISPLAY B: FOLDER DATA SOURCE will retrieve images from the local file system.

The screenshot shows the 'Signature Properties' dialog box with the 'Folder Data Source' tab selected. The 'Image' section has 'Field Name' set to 'Signature\_1' and 'Format type' set to '.PNG'. The 'Folder Data Source' section shows 'Select a folder which will contain the images for these photos' with a 'Browse...' button. The 'Path' field is empty, and the 'Key Field' is set to 'Record ID (default)'. The 'Options' section includes 'Maintain Aspect Ratio' (checked), 'Transparency' (0), 'ChromaKey' (0), and 'Invert Image'. The 'Placement' section shows 'Left' (0.30), 'Width' (1.54), 'Top' (1.60), 'Height' (0.26), and 'Rotation angle (CCW)' (0°). The 'Printing' section includes 'Non-Printable Entry', 'Conditional' (with an 'Edit Condition' button), 'Print on Fluorescing Panel', and 'Mandatory Entry'. The 'Border and Fill' section shows 'Border Color' as 'Black' and 'Border Width' as '2'. The 'Rounded Corners' section shows 'Width' (0.00) and 'Height' (0.00). The 'OK' and 'Cancel' buttons are at the bottom right.

### 4.3.2.3 Adding a Static Image

The images from files object are used to add a static bitmap to the card template design. To begin the process, select the images object in the Menu Bar.



### 4.3.2.4 Adding a Data Field

You can use the **Data Field** object to create a text object that contains variable content. (**Note:** The content will be either entered in the Data Entry application or alternatively will be linked to a database field.)

Use this field to place a database-driven object. (**Note:** This can be accomplished via the Asure ID internet database or connected to external database Live Link functionality.)

Click on **Data Field** to insert a data field on the card. (**Note:** Data Fields are Date Entry points connected to both internal and external databases.) This brings up the properties window.



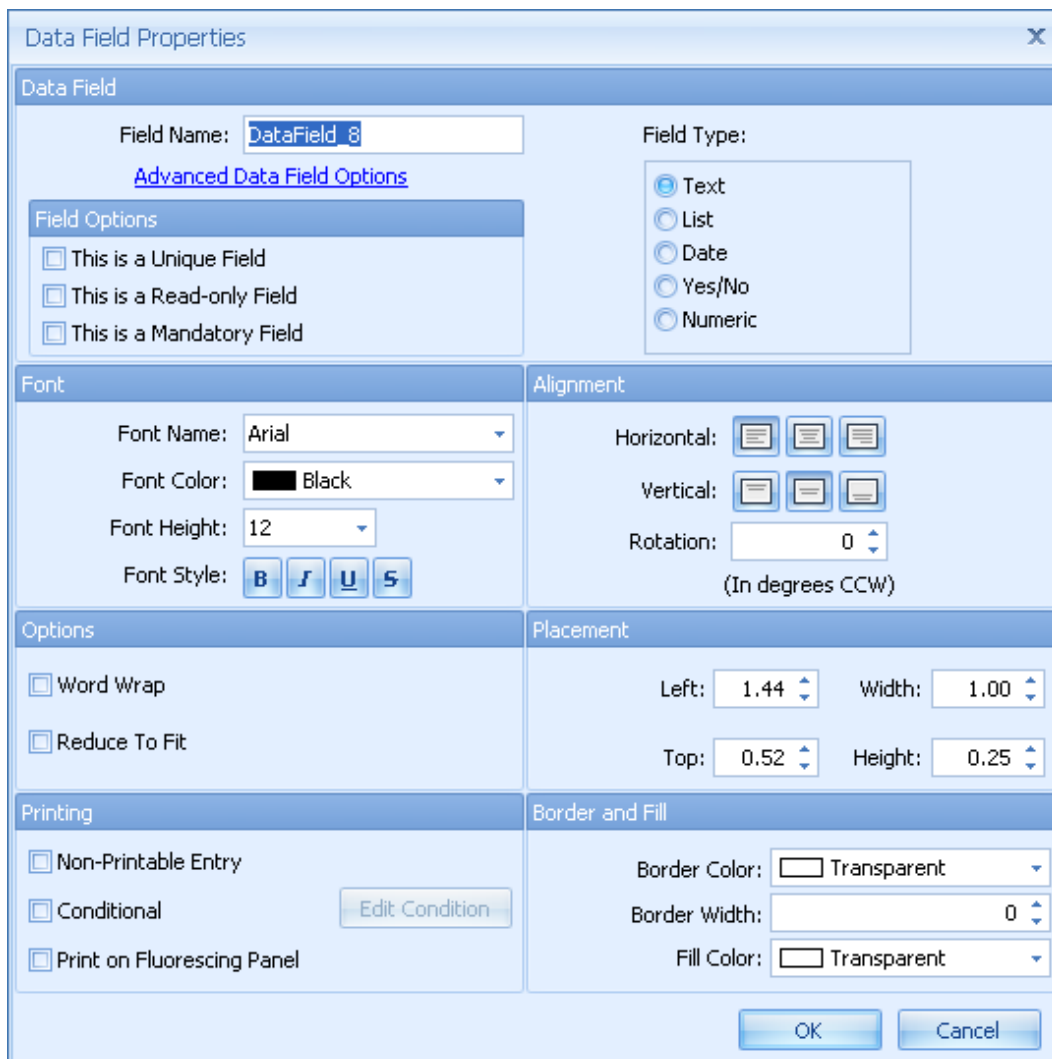
### 4.3.2.5 Setting the Data Field Properties

Click on the **Data Field**; then click on the card drawing surface and drag the text box to the desired size. (**Note:** When the mouse button is released, the application will then display this window.)

At this point, you can set the properties of the **Data Field**, including the type of data that will be contained in the field as well as the source of the data. (**Note:** In addition, you can set other properties of the text box by choosing the appropriate fields that are displayed by this window.)

After all options have been set correctly, you can return to the Card Design application by clicking on the **OK** button.

This may be a Non Printable Entry, Conditional or to be printed with the Fluorescing Panel of the ribbon.



The **Data Field Properties** dialog box is used to configure the appearance and behavior of a data field on a card. It is organized into several sections:

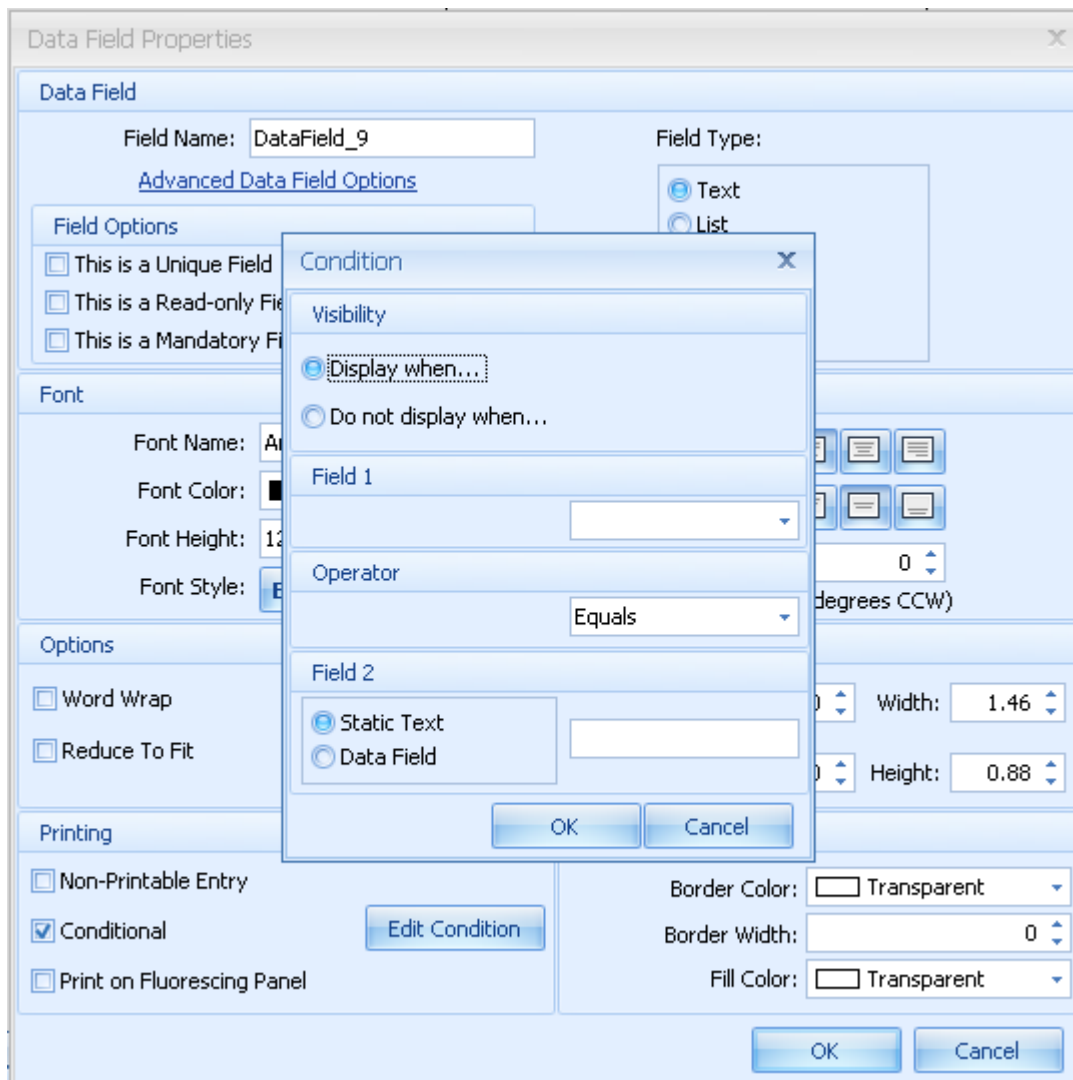
- Data Field**: Contains the **Field Name** (DataField\_8) and **Field Type** (Text, List, Date, Yes/No, Numeric). A link for **Advanced Data Field Options** is also present.
- Field Options**: Includes checkboxes for **This is a Unique Field**, **This is a Read-only Field**, and **This is a Mandatory Field**.
- Font**: Specifies **Font Name** (Arial), **Font Color** (Black), **Font Height** (12), and **Font Style** (Bold, Italic, Underline, Strikethrough).
- Alignment**: Controls **Horizontal** and **Vertical** alignment, **Rotation** (0 degrees CCW), and a note "(In degrees CCW)".
- Options**: Includes checkboxes for **Word Wrap** and **Reduce To Fit**.
- Placement**: Sets **Left** (1.44), **Width** (1.00), **Top** (0.52), and **Height** (0.25) coordinates.
- Printing**: Includes checkboxes for **Non-Printable Entry**, **Conditional** (with an **Edit Condition** button), and **Print on Fluorescing Panel**.
- Border and Fill**: Sets **Border Color** (Transparent), **Border Width** (0), and **Fill Color** (Transparent).

Buttons for **OK** and **Cancel** are located at the bottom right.

### 4.3.2.6 Editing a Condition in Data Field Properties

This allows you to put conditions for a given field (e.g., the field “janitor” could be linked to one color background and “nurse” could be linked to another background.)

Complete your selections below (as needed).

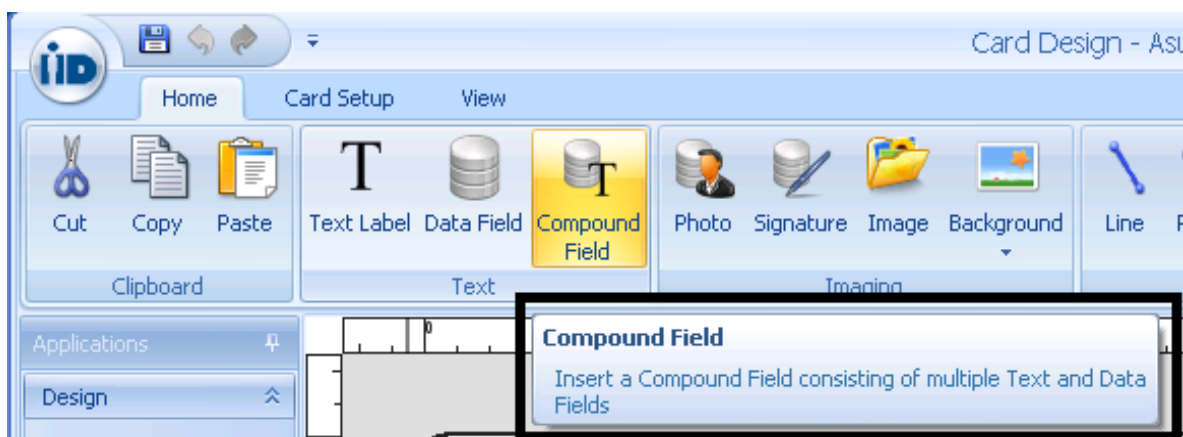


### 4.3.2.7 Using the Compound Field

Compound Field allows you to concatenate multiple data fields into a single string. This can work with both **Text Label** and **Data Fields**. For example: combining **First** and **Last Name** together into a single field. (**Note:** This allows you to combine multiple text and/or Data fields into a single string (e.g., first name, last name, so on).

Use the **Compound Field** object to create a text object that contains variable content that consists of multiple data fields. (**Note:** The content can be entered in the Data Entry application or alternatively linked to a database field.)

Click on **Compound Field** to insert multiple text and data. Click on the card to place the compound field, the properties window will appear.



### 4.3.2.8 Setting the Properties (Compound Field)

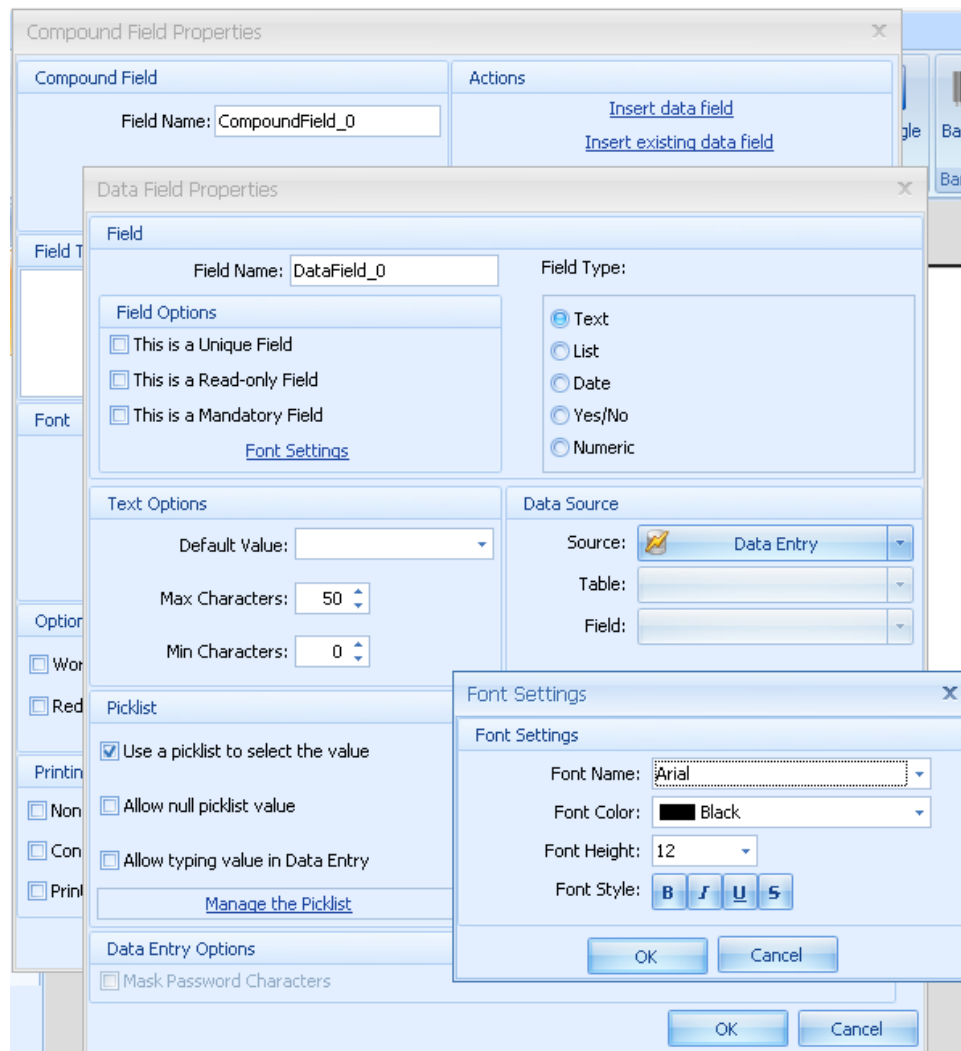
Once selected in the Ribbon, click on the card drawing surface and drag the text box to the desired size. When the mouse button is released, the application will then display this window

At this point, you can set the properties of the **Compound Field**, including the data fields that will be included. In addition, you can set other properties of the text box by choosing the appropriate fields that are displayed by this window.

After all options have been set correctly, you can return to the Card Design application by clicking on the **OK** button.

This may be a Non Printable Entry, Conditional or to be printed with the Fluorescing Panel of the ribbon.

Use the FONT SETTINGS hyperlink in the Data Field Properties for each individual field added to the Compound Field to set specific font details.

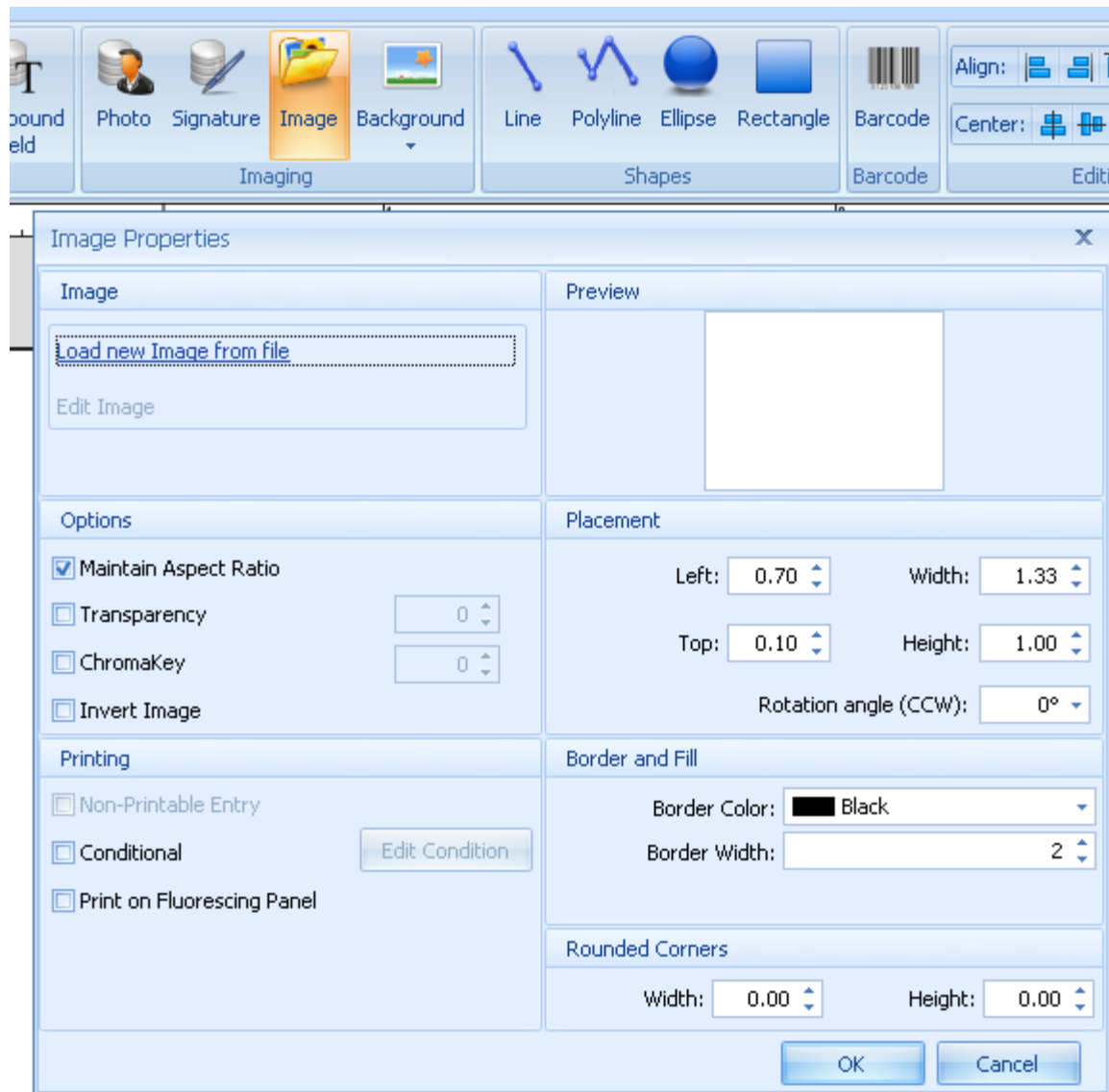


### 4.3.2.9 Using the Image Properties window

This is a static object such as a corporate logo or another image. Follow these instructions:

Click on the card drawing surface and drag the box to the desired size.

When the mouse button is released, the application will then display this window.



#### 4.3.2.10 Adding a Static Bitmap (to Card Template design)

a static bitmap is an image which does not change. Company logos are examples. With this window, browse to the proper image file **Load new Image from File**.

Search for the image file and then click the **Open** button.

Select **EDIT Image** to find edit features for this image file.

At this point, you can set the properties of the Image field, including the source of the data used for the image. In addition, you can set other properties of the Image by choosing the appropriate fields that are displayed by this window.

After all options have been set correctly, you can return to the Card Design application by clicking on the **OK** button.

**Image Properties**

**Image**

[Load new Image from file](#)

Edit Image

**Options**

☒ Maintain Aspect Ratio

☐ Transparency

☐ ChromaKey

☐ Invert Image

**Placement**

Left:  Width:

Top:  Height:

Rotation angle (CCW):

**Printing**

☐ Non-Printable Entry

☐ Conditional

☐ Print on Fluorescing Panel

**Border and Fill**

Border Color:

Border Width:

**Rounded Corners**

Width:  Height:

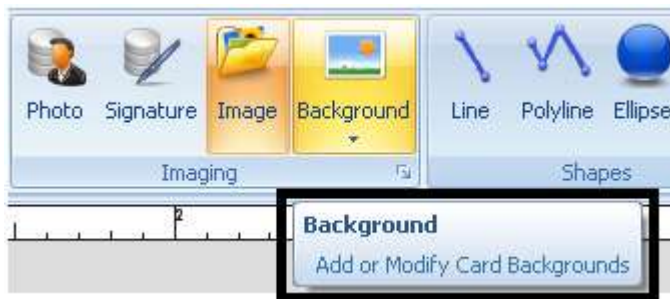


### 4.3.2.11 Using the Background Object

The background object is used to add a static bitmap to the card template design for use as a background for the card. To begin the process, select the background object in the menu bar.

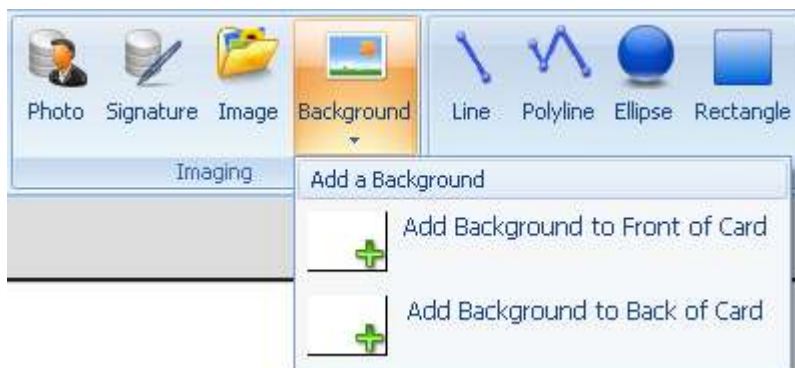
### 4.3.2.12 Using the Background button

Add or modify the card backgrounds as needed.



### 4.3.2.13 Using the Background dropdown

Add background to the front or back of the card, as needed.

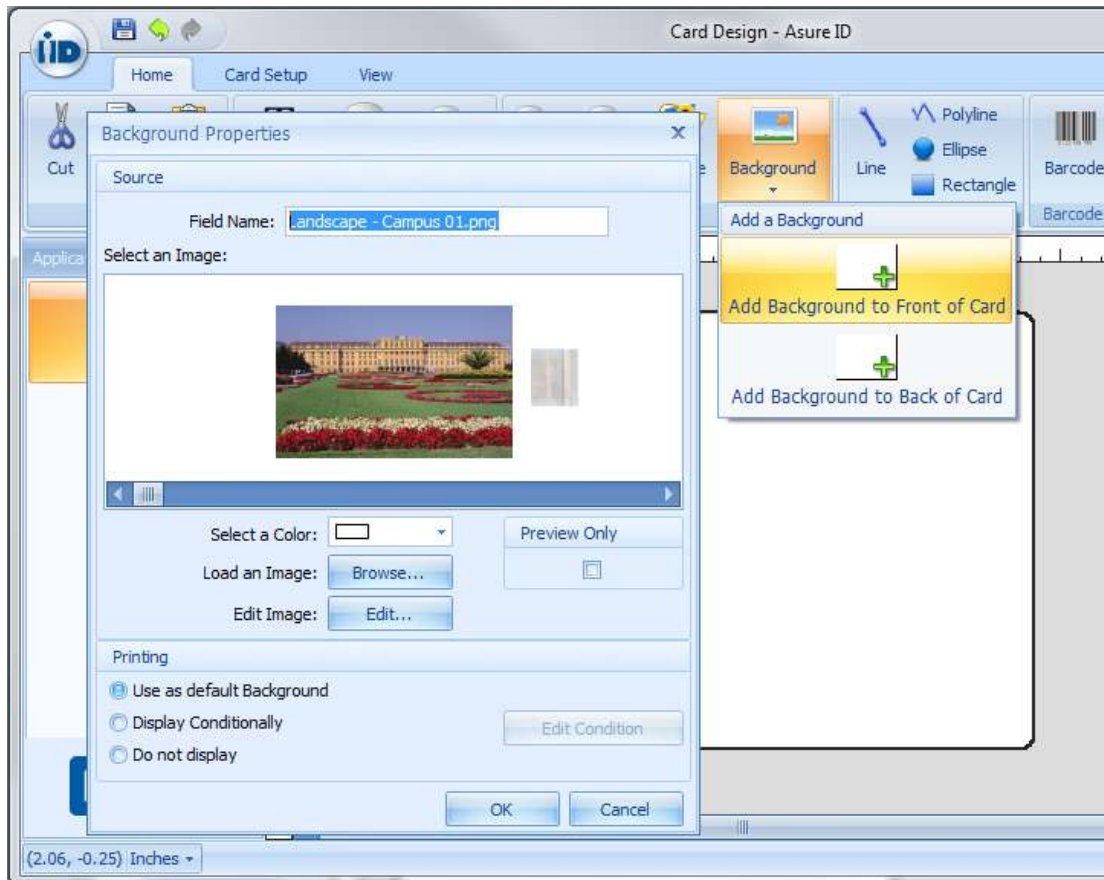


### 4.3.2.14 Using the Add a Background

Follow these instructions:

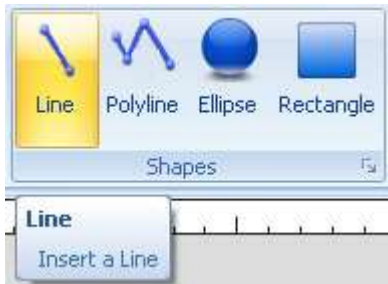
Click on the **Background > Add a background** to Front or Back to bring up the Background Properties window (being displayed).

Select **Browse** to load a new background Image file.



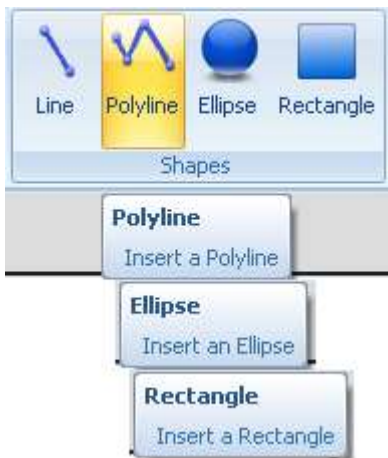
### 4.3.3 Adding Image Shapes

To add image of geometric shapes (i.e., lines, ellipses, rectangles) to the card, select the specific item in the Shapes group on the menu bar; then click on the Card Template to begin drawing.



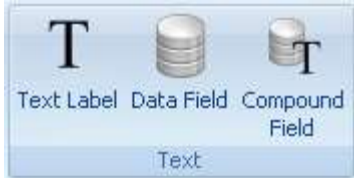
#### 4.3.3.1 Selecting and Applying Lines

Select the line from the menu bar and apply to the card surface. Once on the surface, the line can be resized and the properties can be displayed by double clicking on the line.



### 4.3.3.2 Creating Cards with Non-printable Objects

The purpose of this Card Design is to use non-printable objects on the card.

Step	Procedure
1	Launch the Asure ID 7 software.
2	Enter your User ID and Password in the appropriate areas.
3	Access the Card Design Center application.
4	Access the Application Menu and select <b>New Template</b> from the dropdown menu.
5	Select the attributes for the card (you want to create). Click <b>OK</b> . ( <b>Note:</b> The card surface will display the attributes of the card properties selected.)
6	From the Home tab, select any <b>Text</b> option.
7	Select the <b>Text Label</b> , <b>Data Field</b> or <b>Compound Field</b> option and drop it onto the card surface. ( <b>Note:</b> The Properties window box will be displayed.)  
8	Type in the name of the object in the Field Name.
9	Select non-printable field checkbox in dialog.
10	Make any additional changes to other attributes as needed. Click <b>OK</b> . ( <b>Note:</b> The object is displayed in the Card Properties right pane but not on the card surface.)
11	Select <b>Save Template</b> in the dropdown menu.

### 4.3.4 Adding Barcodes

To add a barcode to the card, select the Barcode item on the menu bar. Once selected, drop the barcode onto the card surface and this properties window box will be displayed.

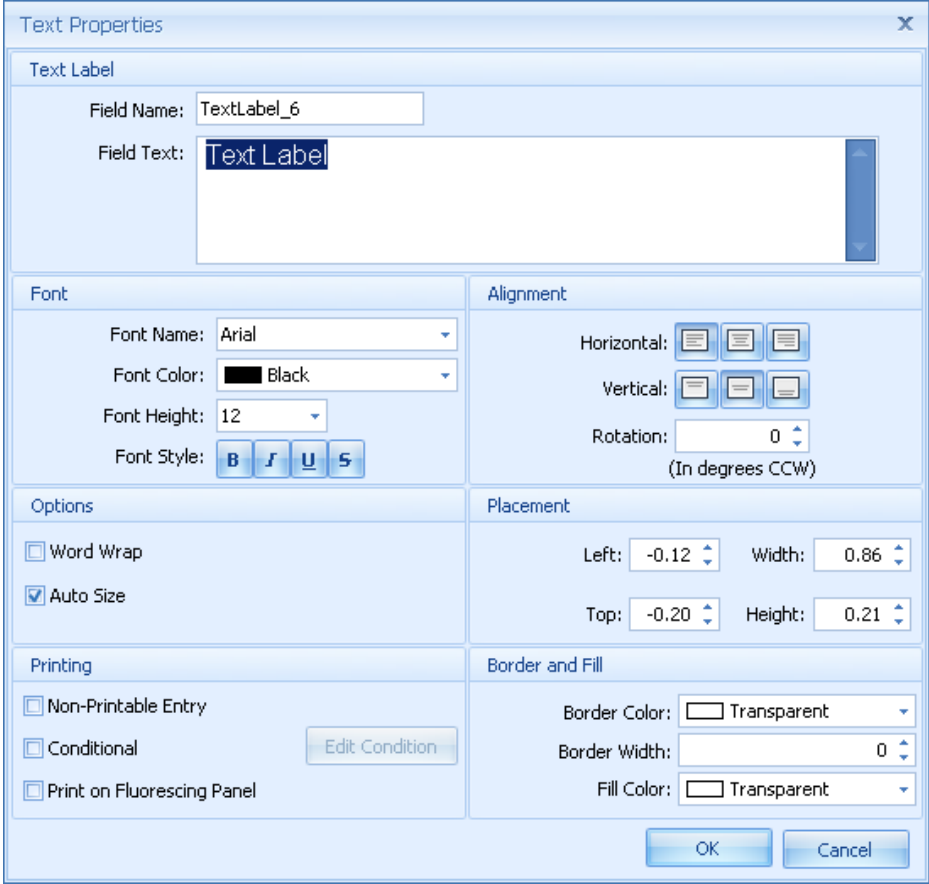
The screenshot shows the 'Barcode Properties' dialog box with the 'Barcode Options' tab selected. The dialog is divided into several sections:

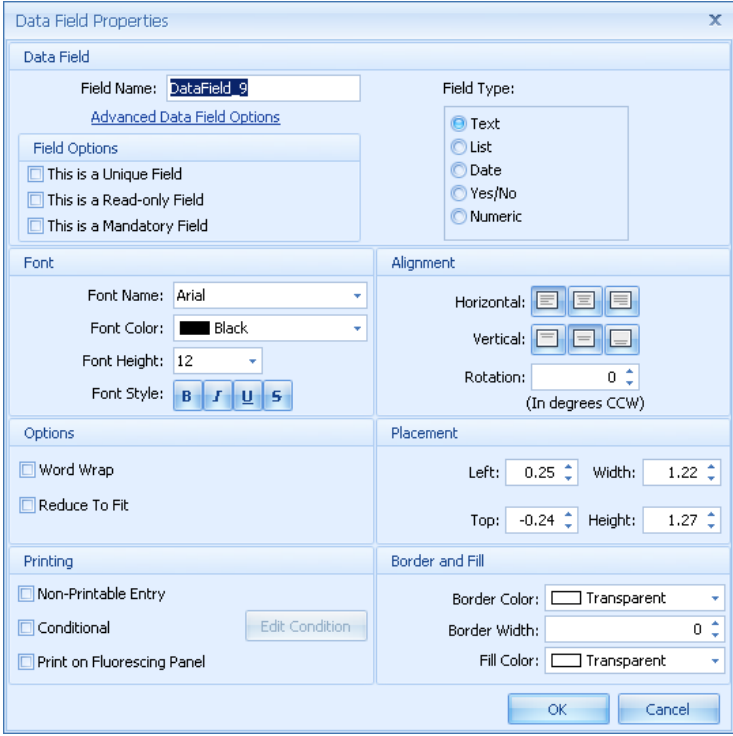
- Barcode Section:**
  - Field Name: Barcode\_0
  - Type: Code 39
  - Test String: 1234567890
  - Font: Arial
  - Font Size: 12
  - Rotate (CCW): 0°
  - ☒ Maintain Aspect Ratio
- Quiet Zone Section:**
  - ☒ Include Quiet Zones
  - Width: 1
- Placement Section:**
  - Left: 0.57
  - Width: 1.65
  - Top: -0.07
  - Height: 1.91
- Bar and Fill Color Section:**
  - Bar Color: Black
  - Fill Color: Transparent
- Printing Section:**
  - ☐ Non-Printable Entry
  - ☐ Conditional
  - ☐ Print on K Panel
  - [Edit Condition](#)
- Create Fields Section:**
  - [Create a new Data Field](#)
  - [Create a new Text Label](#)
- Select Fields Section:**
  - Available:
    - Etiqueta de texto
    - Foto\_1
  - Active: (empty)
  - Buttons: Add >>, << Remove

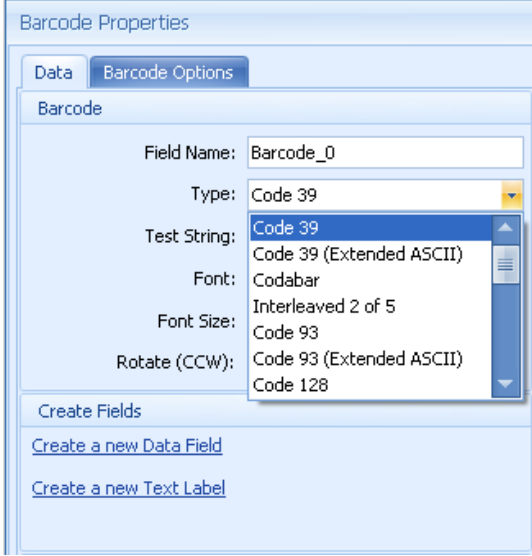
At the bottom of the dialog are 'OK' and 'Cancel' buttons.

### 4.3.4.1 Creating Cards with a Barcode

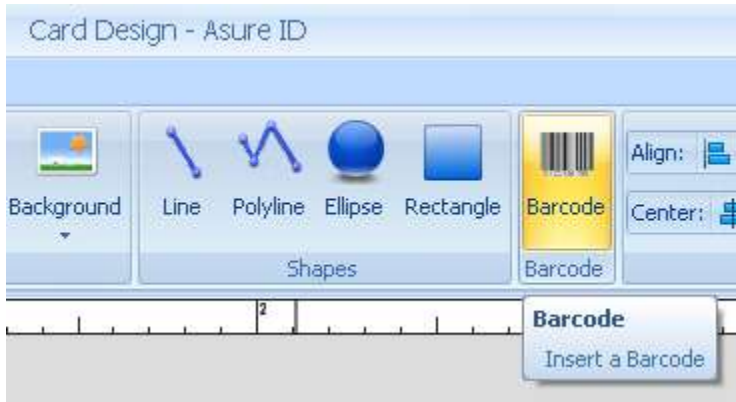
The purpose of this Card Design is to use add a barcode to the card.

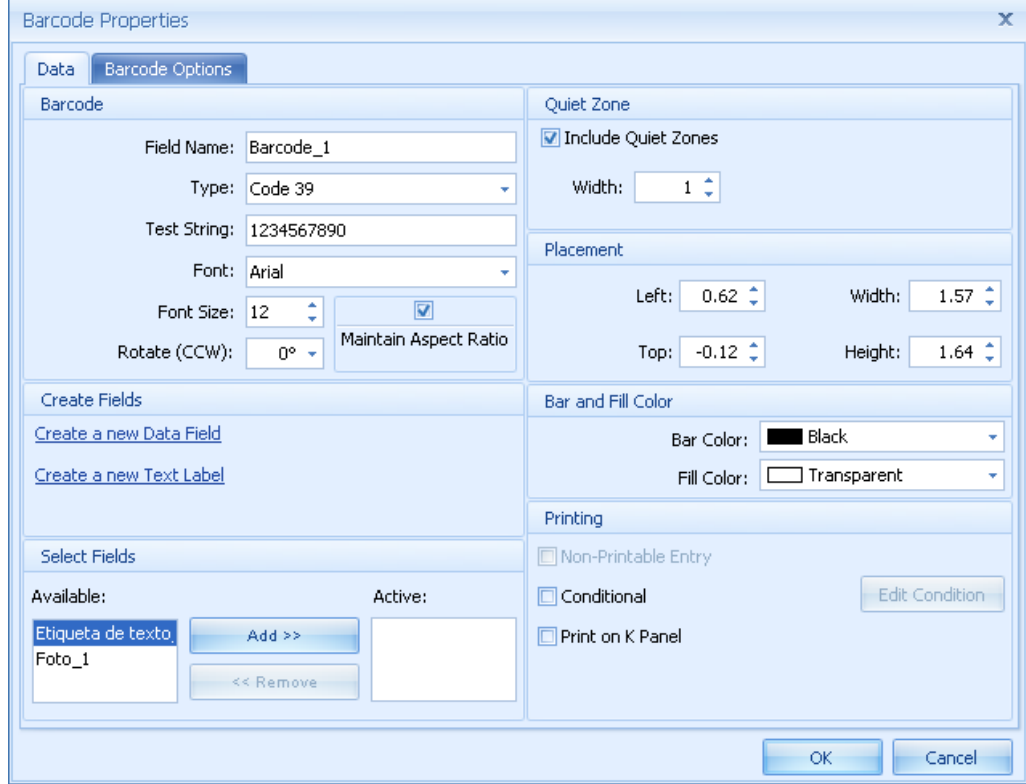
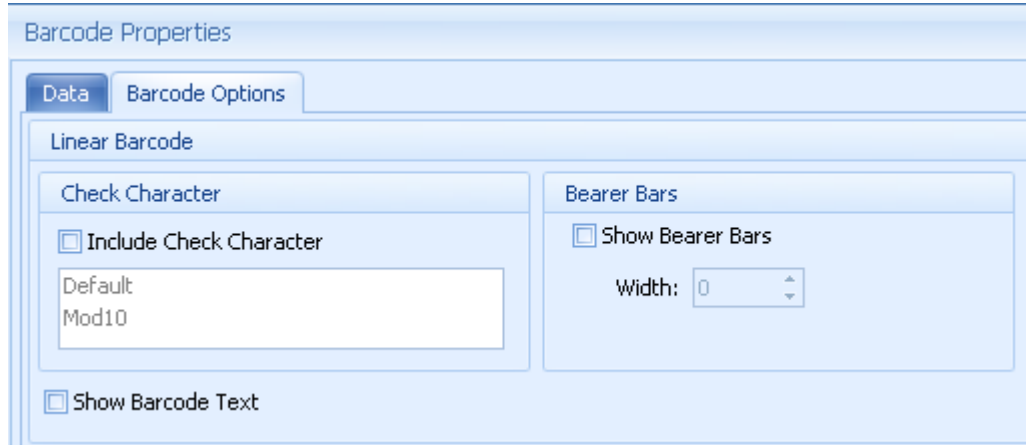
Step	Procedure
1	Launch the Asure ID 7 software.
2	Enter your User ID and Password in the appropriate areas.
3	Access the Card Design Center application.
4	Access the Application Menu and select <b>New Template</b> from the dropdown menu.
5	Select the attributes for the card (you want to create). Click <b>OK</b> . ( <b>Note:</b> The card surface will display the attributes of the card properties selected.)
6	Navigate to the Home tab on the Ribbon.
7	<p>Select any Text option and drop it onto the card surface based on the information to be represented in the barcode. (<b>Note:</b> Your card may already be designed and have the fields already setup.)</p> 

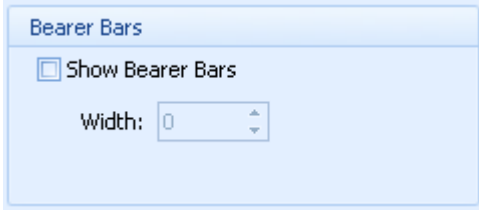

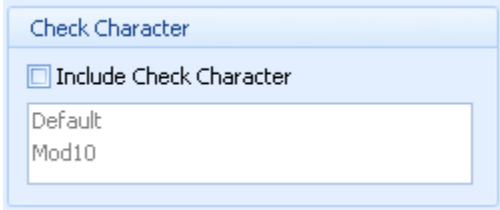
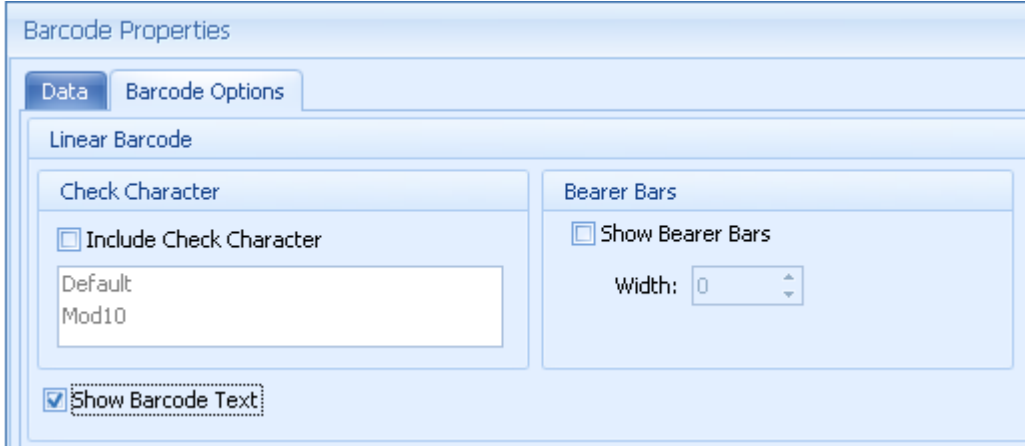
Step	Procedure
8	<p>Barcode values are not visible on the card.</p> <p>Select non-printable field by clicking on the non-printable checkbox in the printing section of the <b>Data Field Properties</b> window.</p> 
9	Type in field name to represent the barcode field.
10	Select the type of barcode desired for the card. See full list of options in Step 11.

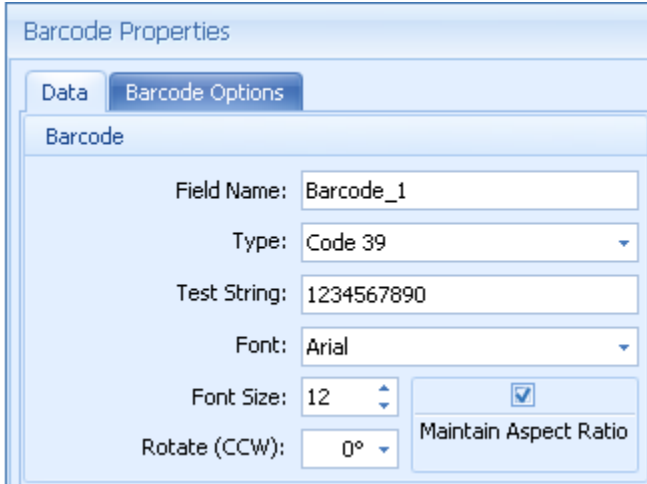

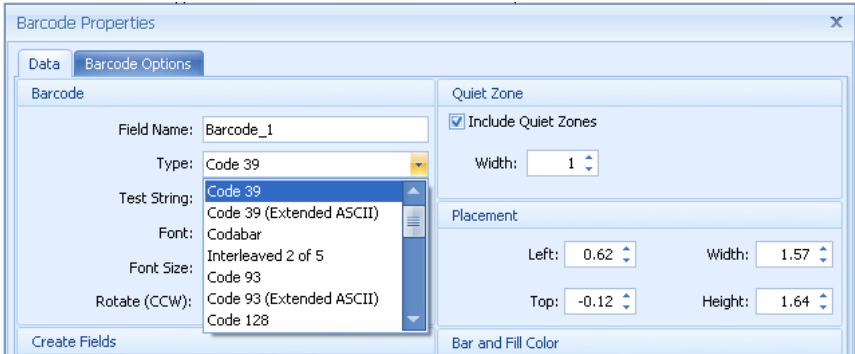
				
Step	Procedure			
11	Barcode Support Matrix provided below.			
	Barcode Type	Number/type of characters	Check Digit Types	
	2 of 5	any numbers	NONE	
	Codabar/NW-7	any		Optional
	Code 11	any	MOD11	Optional
	Code 128	any	MOD103	Automatic
	Code 39	any	MOD43 MOD10	Optional
	Code 93	any	MOD47	Optional
	EAN/UCC-128	any		Automatic
	EAN13	13 numbers	MOD10	Optional
	EAN13+2	15 numbers	MOD10	Optional
	EAN13+5	18 numbers	MOD10	Optional
	EAN-8	8 numbers	MOD10	Optional
	EAN8+2	10 numbers	MOD10	Optional

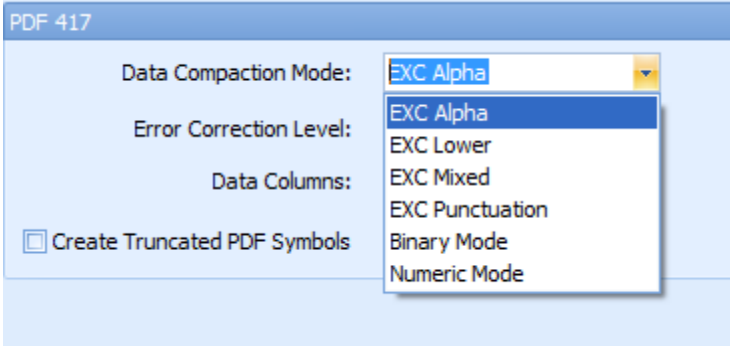
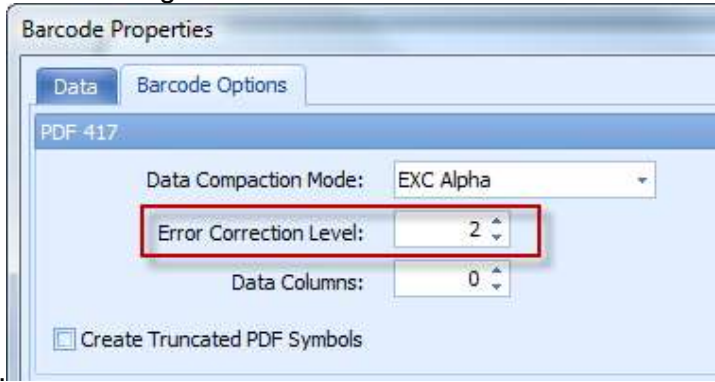
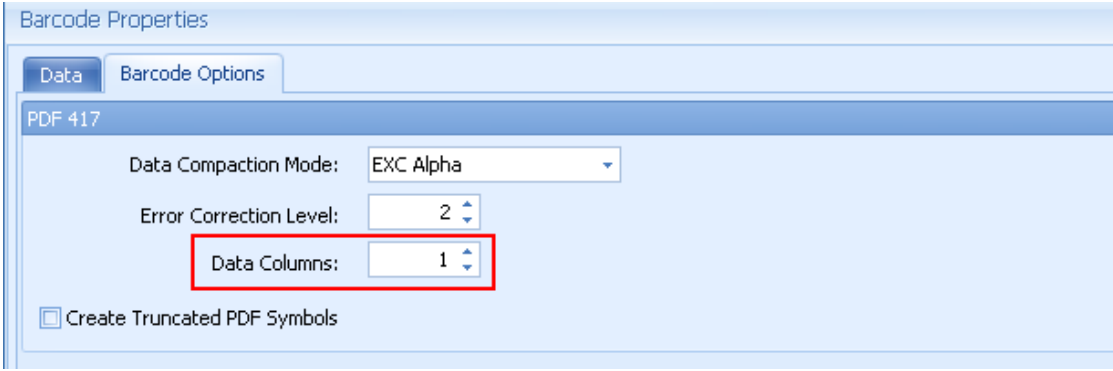


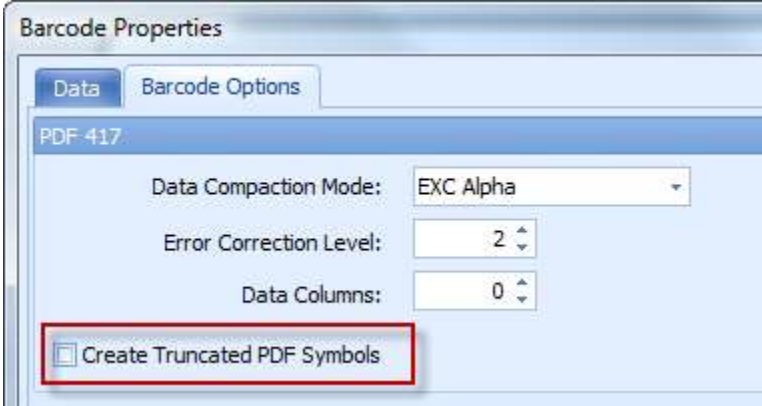

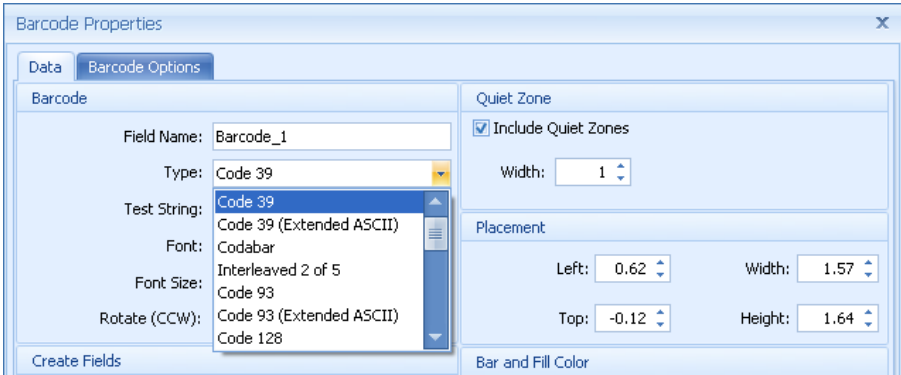
	EAN8+5	13 numbers	MOD10	Optional
	Ext. Code 93	any (full ASCII)	MOD43	Optional
	Ext. Code 39	any (full ASCII)	MOD47	Optional
	Interleaved-2 of 5	number pairs	MOD10	Optional
	ISBN	10/13 digit ISBN		Automatic
	UPC-A	12 numbers	1	Optional
	UPCA+2	14 numbers	1	Optional
	UPCA+5	17 numbers	1	Optional
	UPC-E	7 numbers	1	Optional
Step	Procedure			
12	<p>Select the barcode icon on the Ribbon and drop it onto the card surface to bring up the Properties window.</p> 			
13	<p>Select fields to be added to the active section in the dialog. (<b>Note:</b> This data will be represented by the barcode.)</p>			

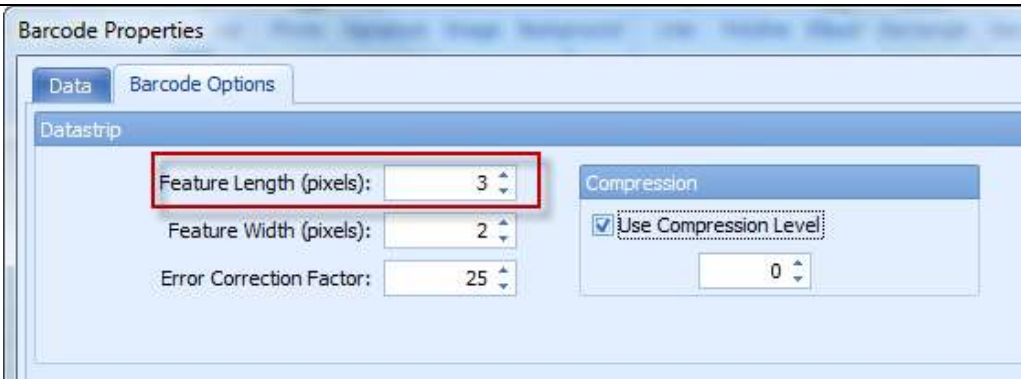
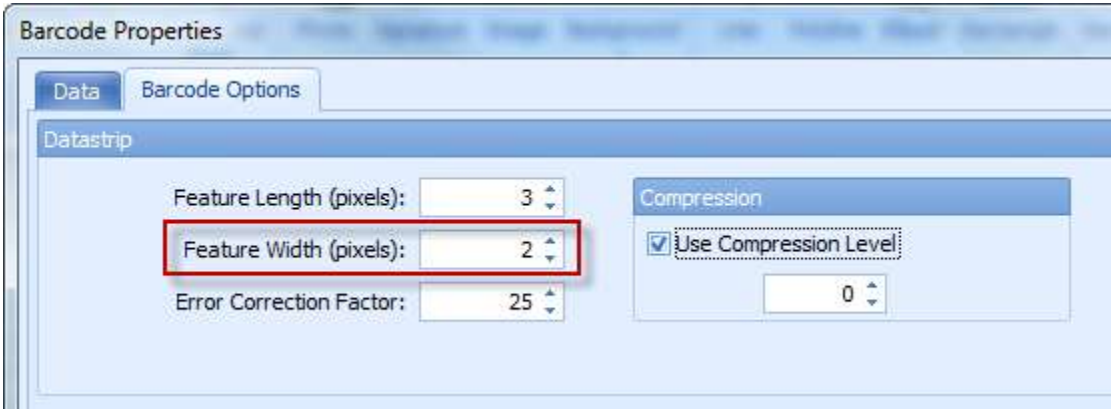
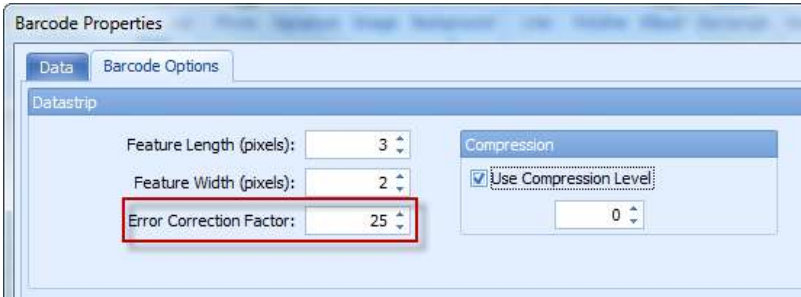
	 <p>The image shows the 'Barcode Properties' dialog box with the 'Barcode Options' tab selected. The 'Barcode' section includes fields for 'Field Name' (Barcode_1), 'Type' (Code 39), 'Test String' (1234567890), 'Font' (Arial), 'Font Size' (12), and 'Rotate (CCW)' (0°). There is a 'Maintain Aspect Ratio' checkbox. The 'Quiet Zone' section has an 'Include Quiet Zones' checkbox and a 'Width' field (1). The 'Placement' section has 'Left' (0.62), 'Width' (1.57), 'Top' (-0.12), and 'Height' (1.64) fields. The 'Bar and Fill Color' section has 'Bar Color' (Black) and 'Fill Color' (Transparent) dropdowns. The 'Printing' section has checkboxes for 'Non-Printable Entry', 'Conditional', and 'Print on K Panel', with an 'Edit Condition' button. The 'Create Fields' section has links for 'Create a new Data Field' and 'Create a new Text Label'. The 'Select Fields' section has 'Available' and 'Active' lists, with 'Etiqueta de texto' and 'Foto_1' in the available list, and 'Add &gt;&gt;' and '&lt;&lt; Remove' buttons. 'OK' and 'Cancel' buttons are at the bottom right.</p>
Step	Procedure
14	<p>Select the <b>Barcode Options</b> tab in the Properties window box.</p>  <p>The image shows the 'Barcode Properties' dialog box with the 'Barcode Options' tab selected. The 'Linear Barcode' section has a 'Check Character' checkbox (unchecked) and a list with 'Default' and 'Mod10'. There is a 'Show Barcode Text' checkbox (unchecked). The 'Bearer Bars' section has a 'Show Bearer Bars' checkbox (unchecked) and a 'Width' field (0).</p>
15	Changing Barcode Options- Bearer Bars

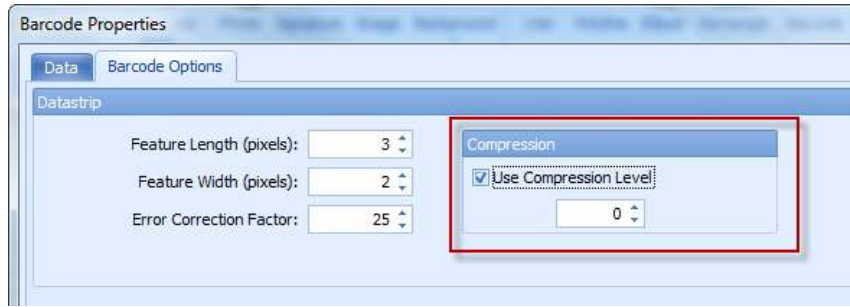

	<p>Check <b>Show Bearer Bars</b> to include bars on the top and bottom of the barcode.</p>  
16	<p>Changing Barcode Options- Check Character</p> <p>Check <b>Include Check Character</b> to add a check digit to the barcode. Select the type of check character to include from the available types.</p> <p>See Step 11 to view the Check Character support for the available barcode types.</p> 
Step	Procedure
17	<p>Changing Barcode Options- Show Barcode Text</p> <p>Check <b>Show Barcode Text</b> to add the text used in the barcode below it.</p> 

18	<p><b>Changing Barcode Options</b></p> <p>The text properties for the barcode can be changed using the Font and Font Size menus on the Data tab.</p>  
Step	Procedure
19	<p><b>PDF 417 Barcode Options</b></p> <p>Select the PDF 417 for 2 Dimensional Barcode.</p> 
20	<p><b>PDF 417 Barcode Options-Data Compaction Mode</b></p> <p>Select a <b>Data Compaction Mode</b> to define how the data will be encoded into the</p>

	<p>barcode.</p> 
21	<p>PDF 417 Barcode Options-Error Correction Level</p> <p>Set the <b>Error Correction Level</b> to set the amount of redundancy built in to the barcode image to allow for errors to be</p> 
Step	Procedure
22	<p>PDF 417 Barcode Options-Data Columns</p> <p>Set the Data Columns to define the number of data/words included in the row of symbols within the barcode.</p> 

23	<p>PDF 417 Barcode Options-Create Truncated PDF Symbols</p> <p>Check Create Truncated PDF Symbols to create a smaller, more compact version of the PDF417 barcode.</p>  
Step	Procedure
24	<p>DATASTRIP Type Options</p> 
25	<p>Changing the Datastrip Options-Feature Length</p> <p>Use the <b>Feature Length</b> option to set the length of the individual elements of the barcode.</p>

	
26	<p>Changing the Datastrip Options-Feature Width</p> <p>Use the <b>Feature Width</b> option to set the width of the individual elements of the barcode.</p> 
Step	Procedure
27	<p>Changing the Datastrip Options-Error Correction Factor</p> <p>Set the Error <b>Correction Factor</b> to set the amount of redundancy built in to the barcode image to allow for errors to be corrected.</p> 
28	<p>Changing the Datastrip Options-Compression</p> <p>Select <b>Use Compression Level</b> to compress the data that is encoded into the</p>

	<p>barcode. This can be used to include additional information in the barcode itself.</p> 
29	<p>Printing Option for all Barcode Types: To print the barcode using the K panel of the ribbon only, select this option.</p> 
30	<p>Select <b>Save Template</b> in the dropdown menu.</p>



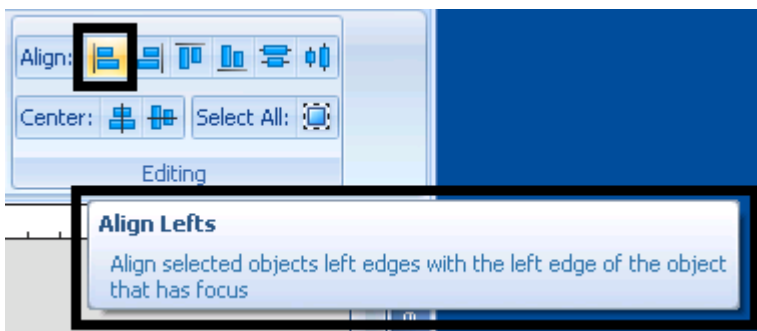
## 4.3.5 Editing

You can use the **Arrange** function in the menu bar to group objects together on the card surface and perform alignment between the objects. You can choose to align objects based on left edge, right edge, upper edge, or bottom edge.



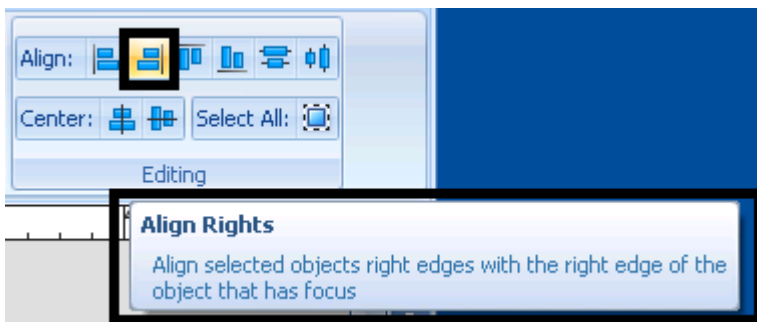
### 4.3.5.1 Aligning Lefts

Use this section to align the left side of selected objects. Draw a box around the images which need to be aligned or click and hold **Shift** to group the multiple items.



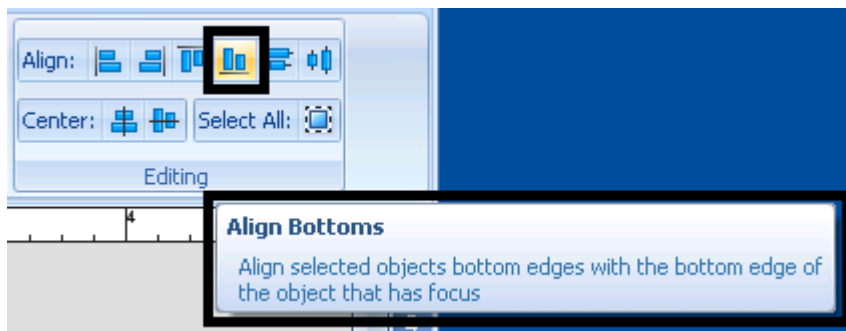
### 4.3.5.2 Aligning Rights

Align the right edges of the selected objects with the right edge of the selected object.



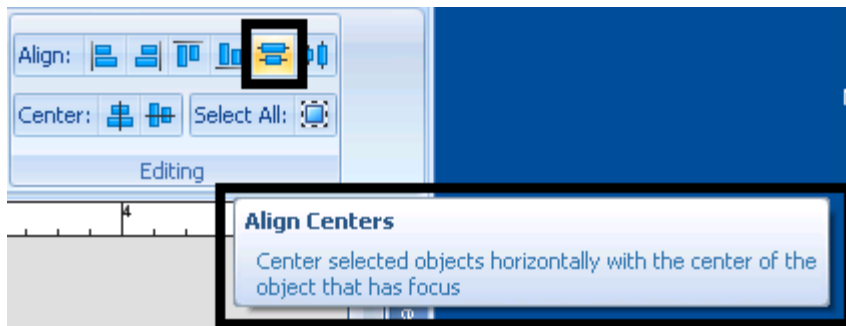
### 4.3.5.3 Aligning Bottoms

Align the bottom edges of the selected objects" with the bottom edge of the selected object.



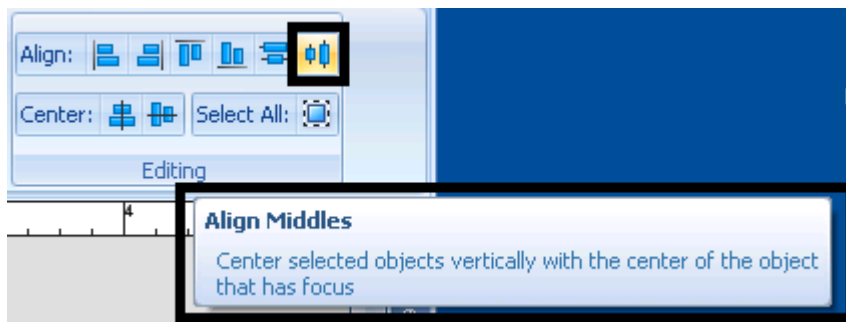
### 4.3.5.4 Aligning Centers

Align the objects horizontally with the center of the selected object.



### 4.3.5.5 Aligning Middles

Align the objects vertically with the center of the selected object.



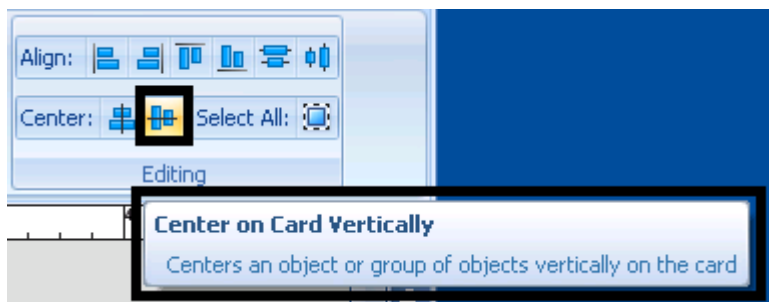
### 4.3.5.6 Center on Card Horizontally

Center an object or a group of objects horizontally on the card.



### 4.3.5.7 Center on Card Vertically

Center an object or a group of objects vertically on the card.



## 4.3.6 Fluorescing Panel Option

Using the F-Panel (Fluorescing Panel) allows for the printer to print secure images that are invisible except when viewed under ultra-violet light.

These Ribbons contain a yellow (**Y**), magenta (**M**), cyan (**C**), and resin black (**K**) panels to create a full color over-the-edge printing identification card.

In addition, the Ribbon contains a dye-based fluorescing panel (**F**) which will allow you to print a standard or one-to-one personalized grayscale fluorescing image that is completely invisible until exposed to ultraviolet light.

### 4.3.6.1 Listing the Object Types (F-Panel)

**The object types that are supported by the F-Panel are:**

Text Label  
Data Field  
Compound Field  
Photo  
Signature  
Image  
Line  
Polyline  
Ellipse  
Rectangle

**Objects that are NOT supported on F-Panel are:**

Backgrounds  
Barcodes  
Magstripe

(**Note:** Refer to this guide for this Object Type description and how to use these options.)

### 4.3.6.2 Required for Printer Support (F-Panel)

Please see below:

DTC400 & DTC 550 support 1-bit pixel, or monochrome images only.

HDP5000 support 24-bit color images only.

For non-Fargo brand printers and Fargo printers that do not support printing objects to the F-Panel, a message box will be displayed alerting the user that these objects will NOT be rendered.

In order for this F-Panel option to function in a Fargo brand printer, the F-Panel ribbon and supported Driver & Firmware must be used.

See the printer's user guide or HELP file for driver setup instruction.

Text Properties dialog box with **Print on Fluorescing Panel** checkbox will allow the FIELD TEXT to print with the Fluorescing Panel viewed only with Ultra-Violet light.

The screenshot shows the 'Data Field Properties' dialog box with the following settings:

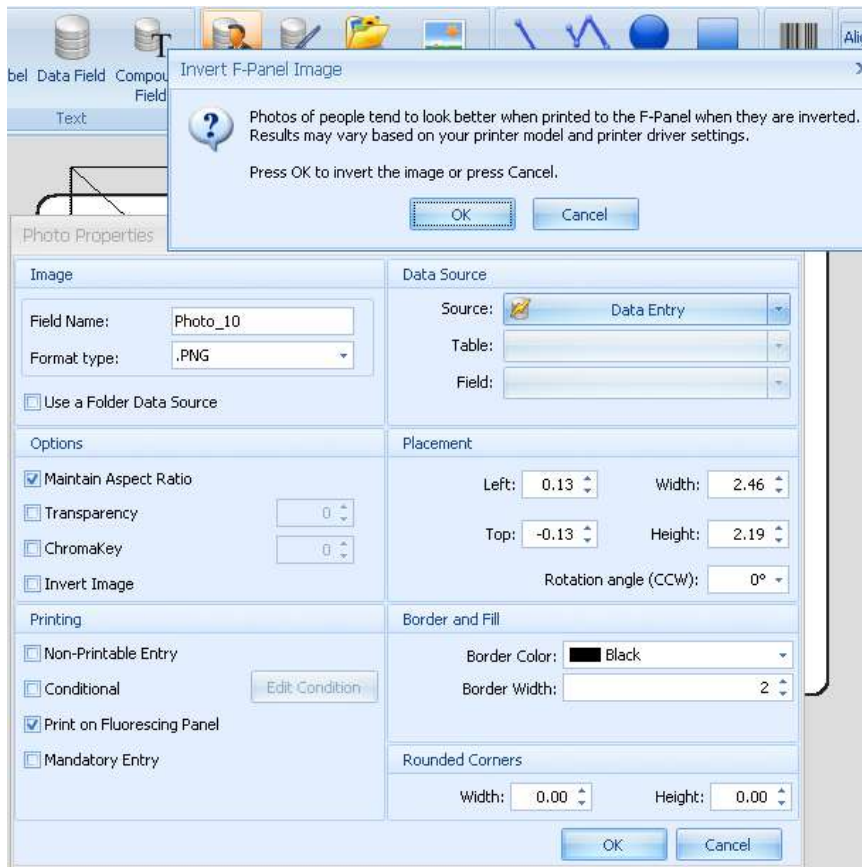
- Data Field:** Field Name: DataField\_10, Field Type: Text
- Field Options:**
  - ☐ This is a Unique Field
  - ☐ This is a Read-only Field
  - ☐ This is a Mandatory Field
- Font:** Font Name: Arial, Font Color: Black, Font Height: 12, Font Style: B, I, U, S
- Alignment:** Horizontal: Left, Vertical: Top, Rotation: 0 (In degrees CCW)
- Options:**
  - ☐ Word Wrap
  - ☐ Reduce To Fit
- Placement:** Left: 0.16, Width: 1.41, Top: -0.14, Height: 1.00
- Printing:**
  - ☐ Non-Printable Entry
  - ☐ Conditional (with 'Edit Condition' button)
  - ☒ Print on Fluorescing Panel
- Border and Fill:** Border Color: Transparent, Border Width: 0, Fill Color: Transparent

Buttons at the bottom: OK, Cancel

The text will appear in a „bluish“ tone on the preview so it can be differentiated from objects on the YMC panel.



Photo Properties dialog box with **Print on Fluorescing Panel** checkbox will allow the PHOTO to print with the Fluorescing Panel viewed only with Ultra-Violet light. When the Print on Fluorescing Panel is checked the message box **Invert F-Panel Image** will appear checked. (**Note:** This box may be turned off however the photos tend to look better when they are inverted.)



The photo will appear in a „bluish” tone on the preview so it can be differentiated from objects on the YMC panel.



A



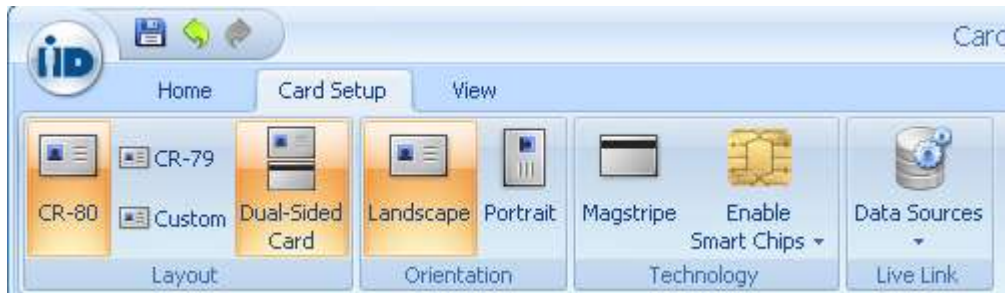
B

This preview shows both the image being printed with YMC ribbon and the same image being printed with the F-Panel portion of the ribbon. Display B.

## 4.4 Card Setup Tab

### 4.4.1 Layout

You can use the Card Setup tab to set various properties of the physical card, including card layout, technology chip options and data sources used on the card.



#### 4.4.1.1 Selecting the Card Size (CR-79)

As stated, select the Card Size (CR-79) as needed.



#### 4.4.1.2 Selecting the Card Size (CR-80)

As stated, select the Card Size (CR-80) as needed.



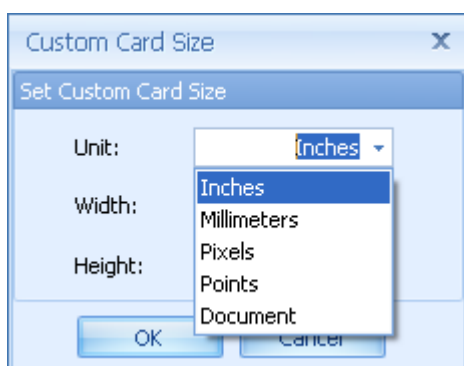
#### 4.4.1.3 Selecting the Card Size (Custom)

Click on **Custom** to bring up the Custom Card Size dialog.

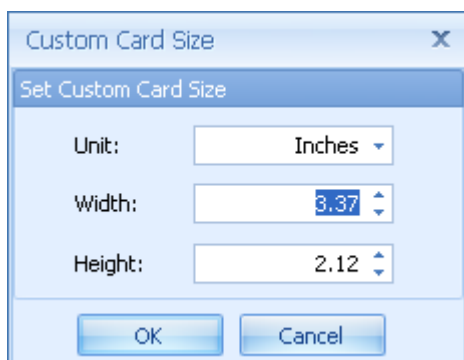


#### 4.4.1.4 Using the Custom Card Size window

Select the unit of measurement.



Choose the unit, width, and height from these options.





## 4.4.2 Orientation Options

The Layout function is used on the Menu Bar to accomplish two functions. Select the **Dual Sided Card** if applicable. Select the orientation of the card as landscape (default) or portrait.

You can change the card orientation to **Landscape** (horizontal orientation) or **Portrait** (vertical orientation).



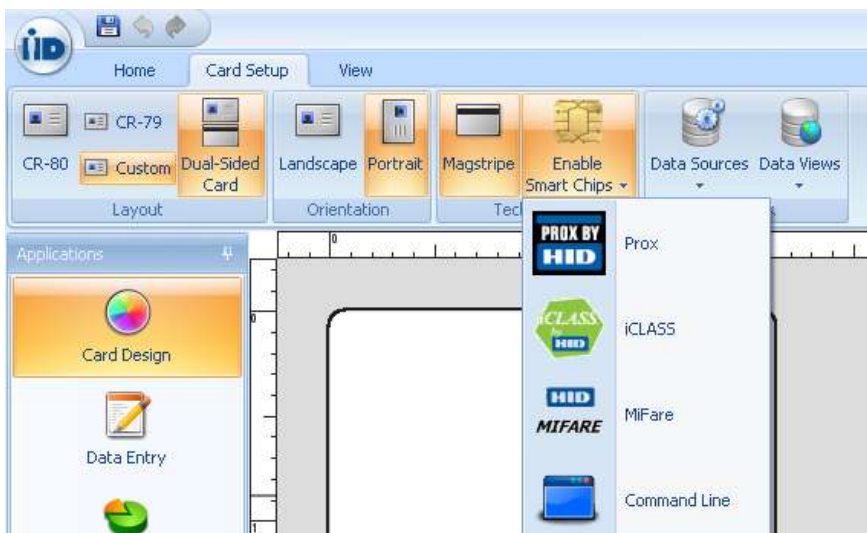
## 4.4.3 Technology Options

The options here give the ability to describe what technology features exist on the card. Asure ID supports magnetic stripe cards and also supports smart cards that contain a solid-state device (such as a memory chip) on which data can be stored.

Select Magnetic stripe or Enable Smart Chips from the Technology options.



Select iCLASS, MiFare, HID Prox, or Command Line from the Enable Smart Chips option.



### 4.4.3.1 Magstripe

Select the **Magnetic stripe** option to bring up the magnetic stripe Properties window, shown below. See the below for additional information on this option.



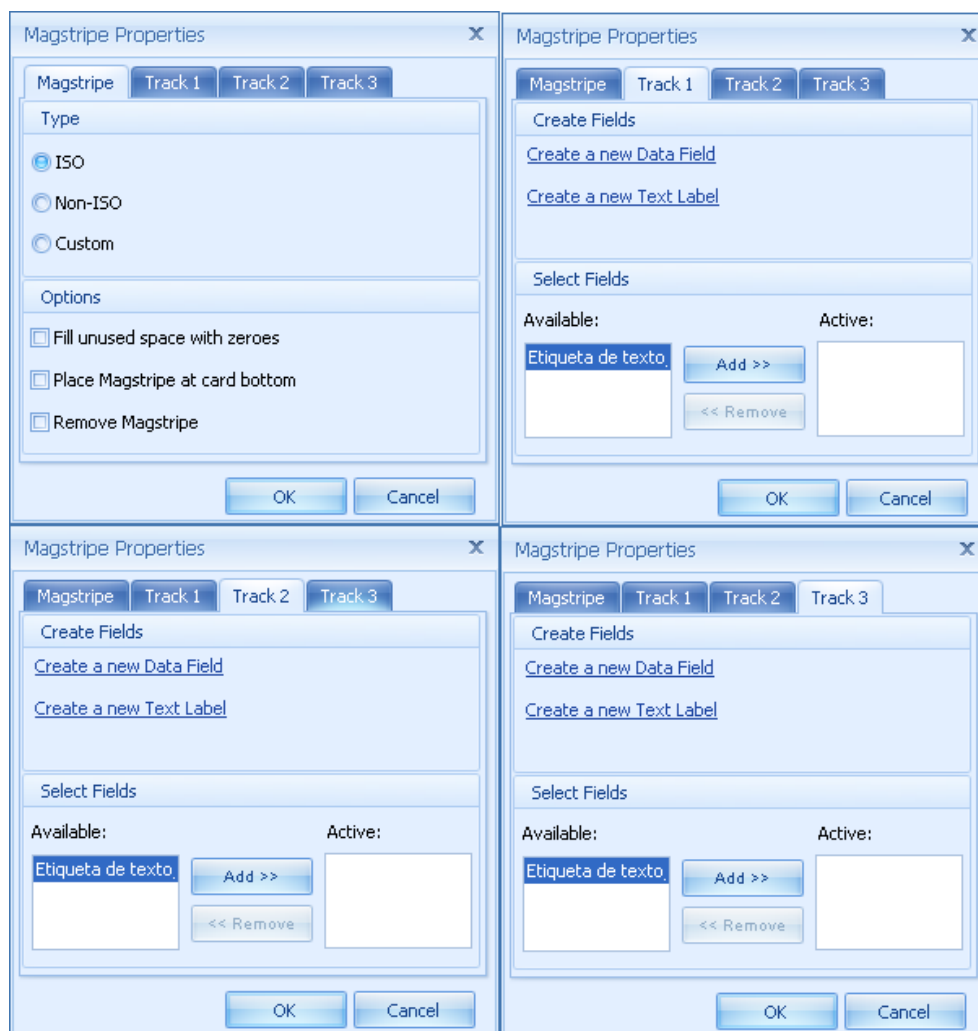
### 4.4.3.2 Setting the Magnetic Stripe Properties

Set the properties in this window.

Select **ISO**, **Non-ISO** or **Custom** under magnetic stripe Type.

Select either Fill used space with zeros, Place Mag Stripe at bottom of the card or Remove the magnetic stripe from the card under Options.

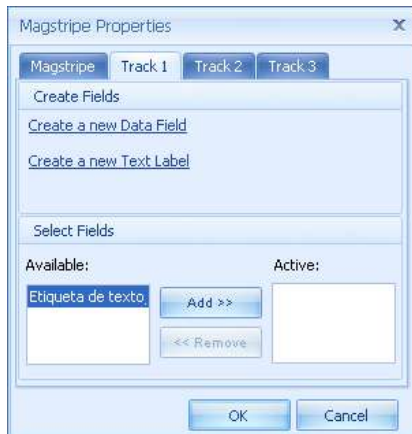
Enter data for each track by selecting the appropriate tab (Track 1, 2, or 3). Select the appropriate data field (that is to be used to supply the data).



### 4.4.3.3 Adding or Removing under Track

To add a track, select from the left column and select the **Add** button. To remove a track, select from the right and select the **Remove** button.

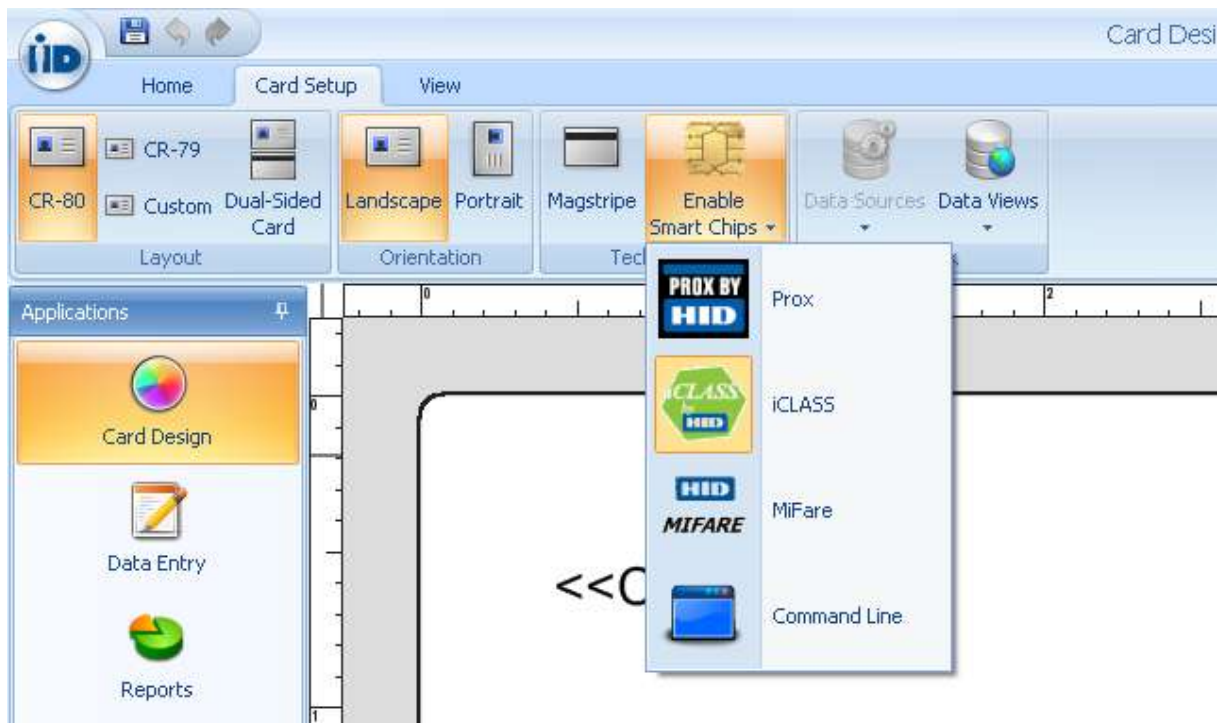
Add or remove a **Data Field** or a **Text Label**, as shown below.



### 4.4.3.4 Enabling the Smart Chips

You can use this option to designate which chip type is contained in the card (that will be used to produce the output).

Click **Enable Smart Chip** to bring up the dropdown (shown below).



#### 4.4.3.5 Selecting a Chip Type

Asure ID currently supports HID Prox, MiFare, and iCLASS. After selecting a chip type, the application opens a side panel on the right portion of the PC's monitor.

This panel is used to display the current chip type designated for this card and also is used to display the applications that are loaded onto this chip.

Note that multiple chips can be configured for the card template (as needed) (i.e., HID Prox, MiFare, and iCLASS).

**SAM (Secure Access Module):** **SAM (Secure Access Module):** Contact card, a SLE 88 chip from Infineon, which holds the iCLASS keys and the iCLASS encryption/decryption algorithm. This contact smart card holds encryption & decryption algorithms required for this procedure.

**Command Line:** Third Party Encoding Option:

## 4.5 iDIRECTOR Access and Usage

This section provides the background, processes, and procedures to work with the iDIRECTOR feature. You will learn how to:

### 4.5.1 Introduction

With iDIRECTOR, you can use Asure ID to dynamically handle the addition of new Chip types.

- iDIRECTOR allows other applications besides the SAM application to handle Key Management in Data Entry (Enter passwords prior to encoding).
- Use application IDs, instead of application names (which can change) to manage iDIRECTOR objects in Card Design UI (formerly unavailable).
- For more information on iCLASS Programming refer to: [Appendix C- iCLASS Programming Guide](#)
- For more information on Command Line (Third Party Encode) refer to Section 4.6

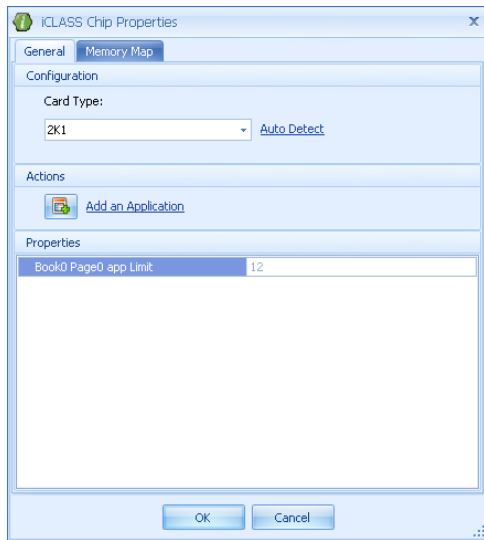
### 4.5.2 Description

#### 4.5.2.1 Adding an application for HID Prox , iCLASS, MiFare, or Command Line

This uses the iDIRECTOR.



(**Note:** The Tooltip is shown when you hover over any property in the Properties section of the General tab.)



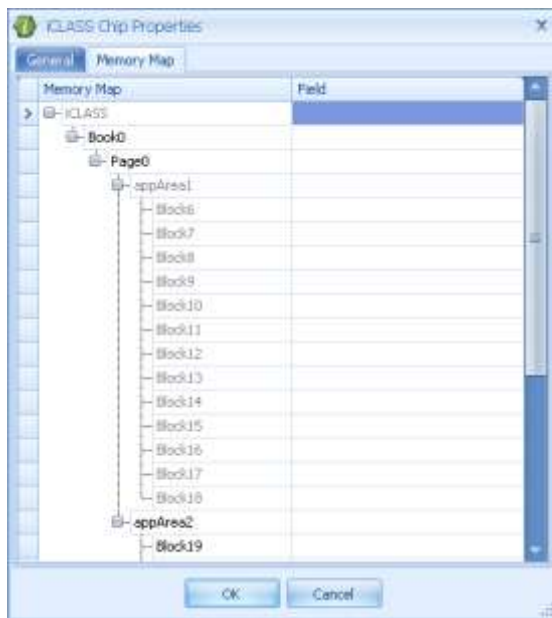
### 4.5.2.2 Memory Mapping

For applications that support Memory Mapping (currently RFIDEas and Custom Application's), you can move a Fields Memory Mapping location with the Memory Mapping tab.

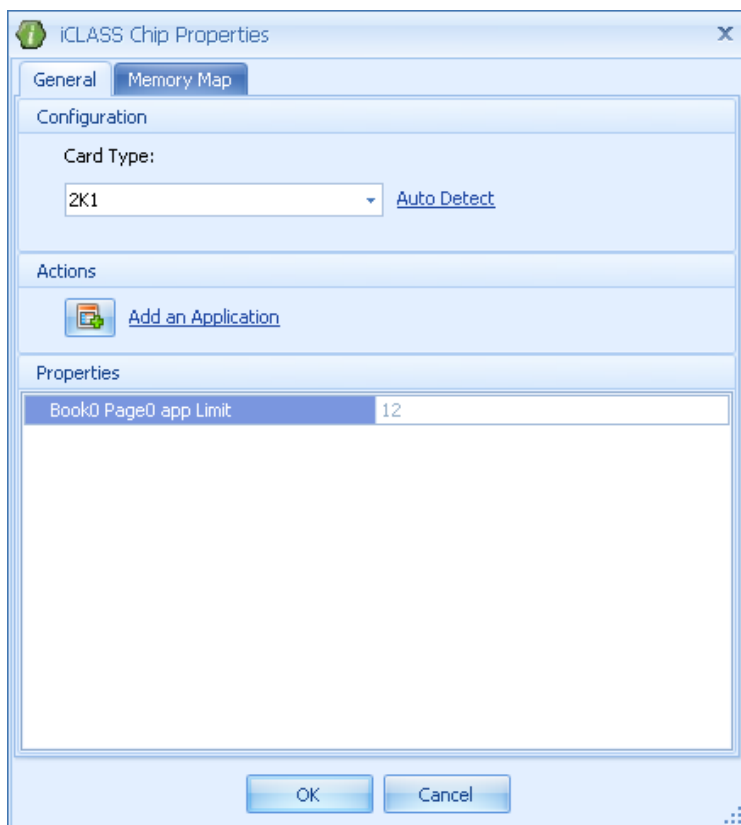
You can drag and drop fields from one memory location to another

Unavailable Memory Map locations will appear "grayed out".

Feedback is provided when the field is dragged over an invalid memory location.

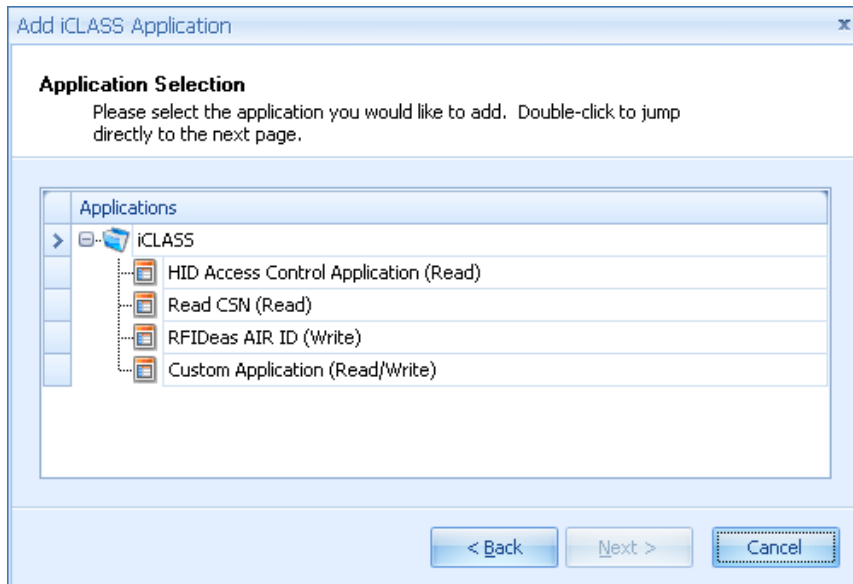


Click on **Add an Application** to start the iDIRECTOR Wizard.

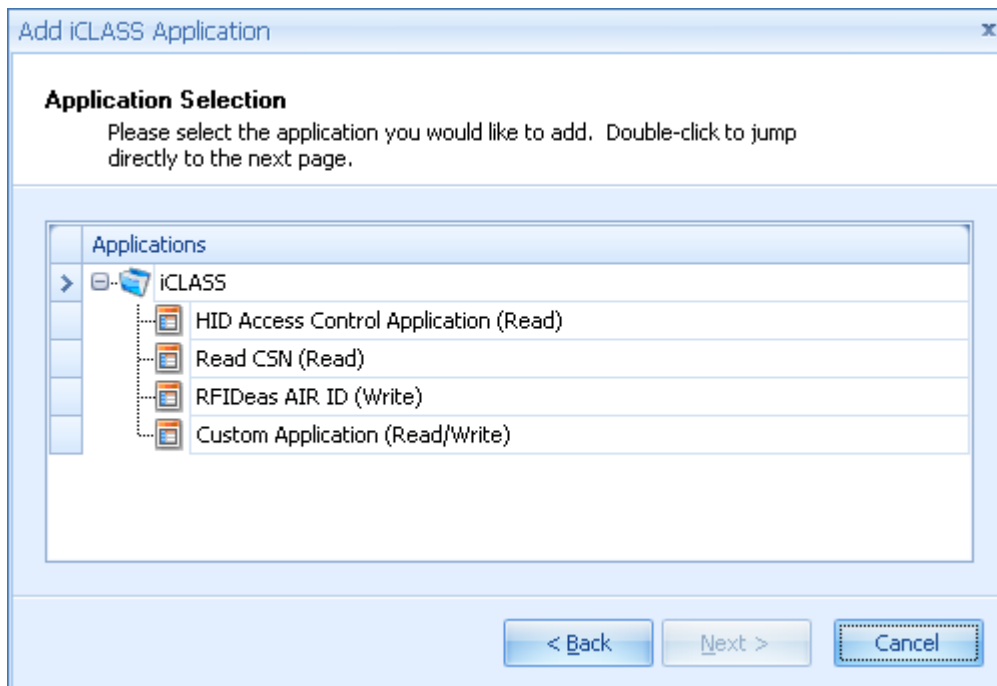


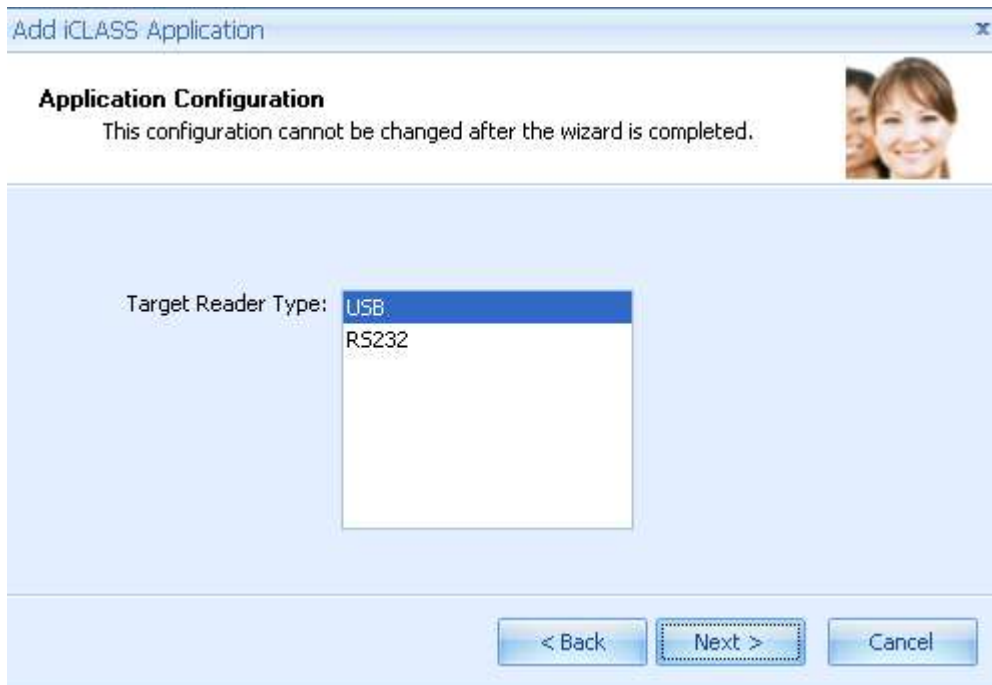


Choose the application you would like to add on at this time.



The Configuration Type for the application are chosen if the application has one; otherwise, this step is not followed. Each option has specific Applications that may be added. RFIDEas Air ID (Write) is shown in the display below.





The application's properties can be configured if the application has any; otherwise, this step is not followed.

You can finish the Wizard or cancel the add operation with the final screen.

You can automatically create and Data Fields to each iDIRECTOR field with the "Create a Data Field for each iDIRECTOR Field" check box will allow. (**Note:** If you choose not to do this, then you can manually create and link each field.)

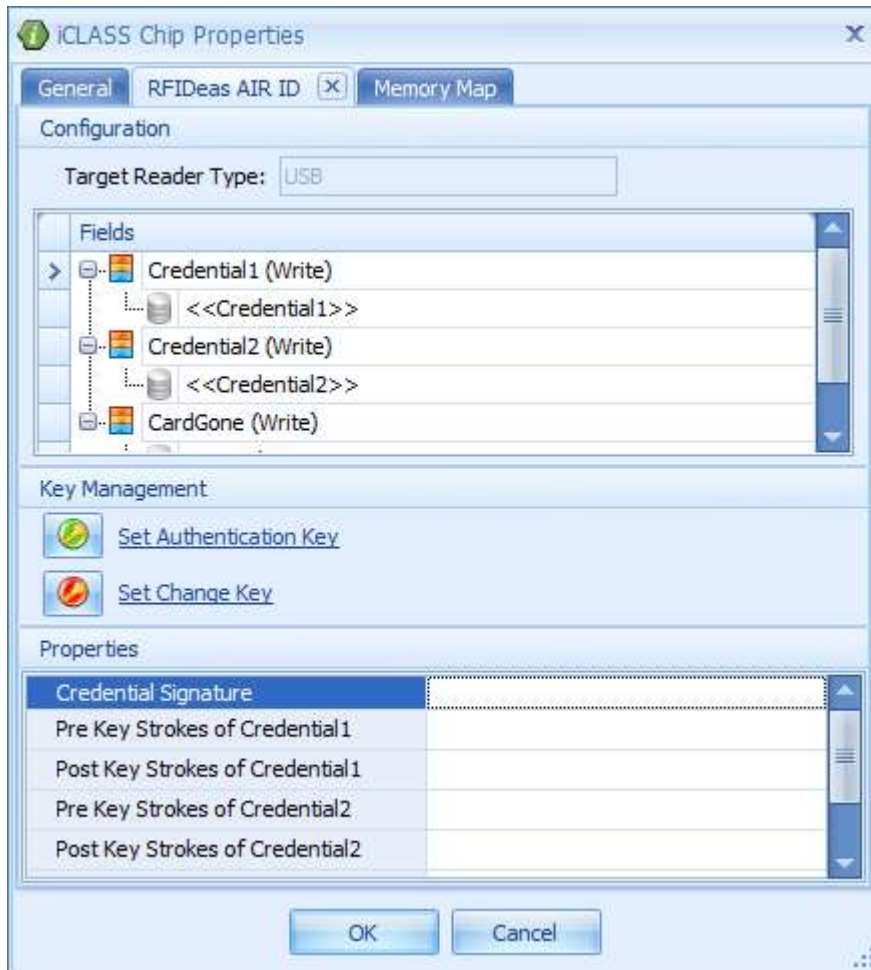


### 4.5.2.3 Application Tabs

Each Application (that is added in the Add Applications Wizard) has its own tab in the Properties dialog, which is used to access its settings.

Each application's iDIRECTOR object properties are integrated into the application's tab in the Properties dialog.

A set of hyperlinks for Password Management are available from the application's tab. (**Note:** See the Key Management section below for more details.)

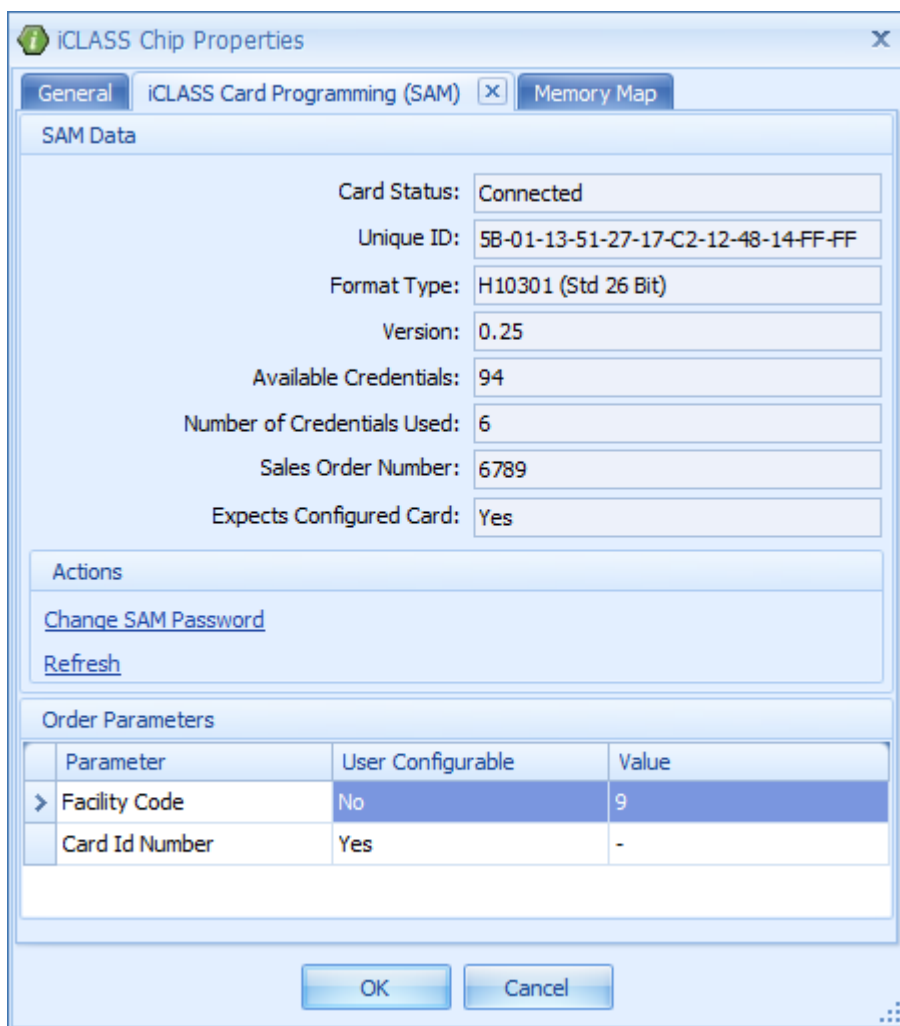


A Tooltip is shown when you hover over any property in the Properties section of an Application tab.

Pressing the 'X' button on an application's tab will remove the application from the chip.

Since the iCLASS Card Programming (SAM) Application has some special functionality, the Sam Status and password control are embedded into a tab, instead of using the standard application tab.

Refer to iCLASS Programming: [Appendix C- iCLASS Programming Guide](#)



The image shows a Windows-style dialog box titled "iCLASS Chip Properties". It has three tabs: "General", "iCLASS Card Programming (SAM)", and "Memory Map". The "iCLASS Card Programming (SAM)" tab is selected. The dialog is divided into several sections: "SAM Data", "Actions", and "Order Parameters".

**SAM Data**

Card Status:	Connected
Unique ID:	5B-01-13-51-27-17-C2-12-48-14-FF-FF
Format Type:	H10301 (Std 26 Bit)
Version:	0.25
Available Credentials:	94
Number of Credentials Used:	6
Sales Order Number:	6789
Expects Configured Card:	Yes

**Actions**

[Change SAM Password](#)

[Refresh](#)

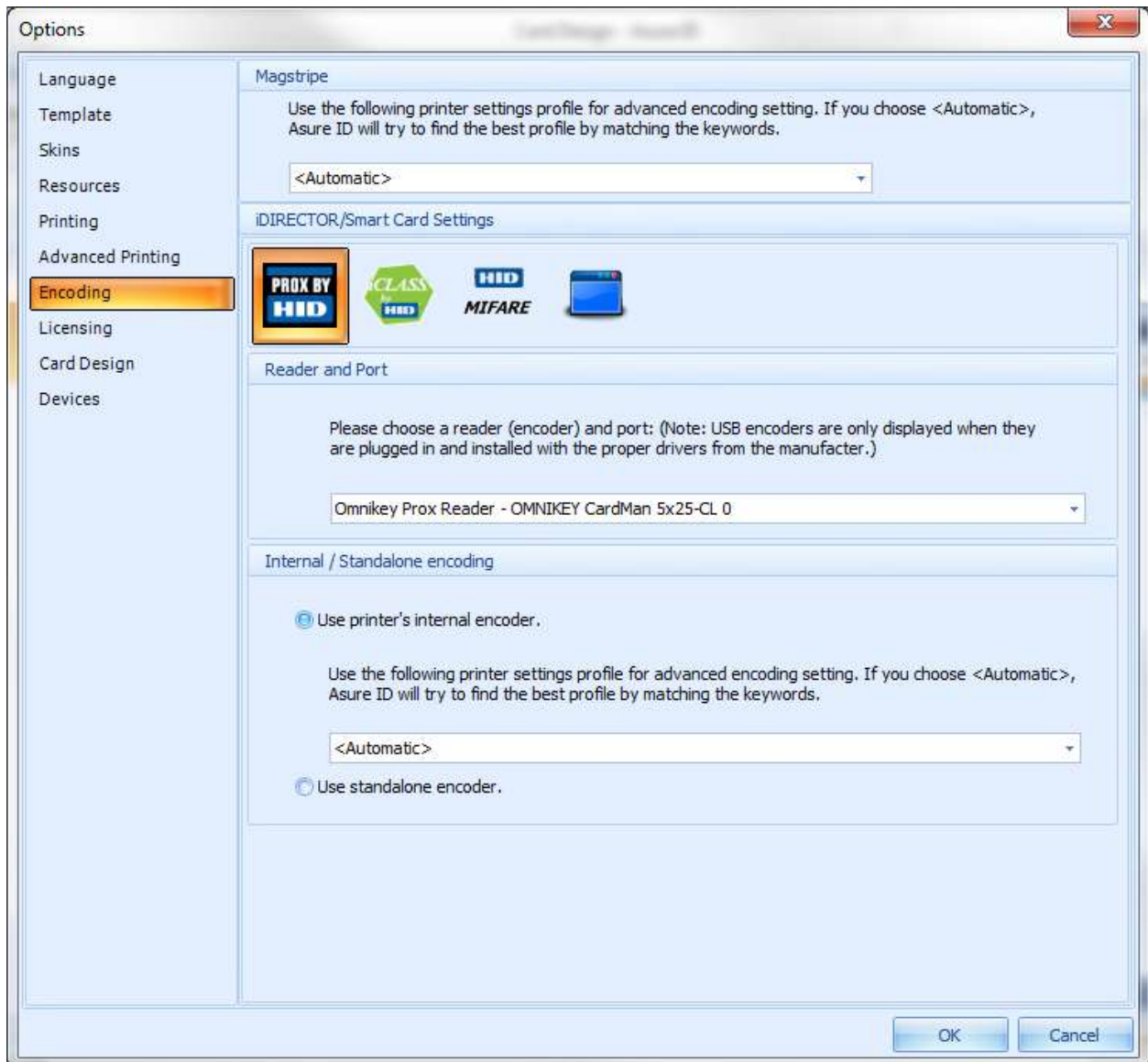
**Order Parameters**

Parameter	User Configurable	Value
> Facility Code	No	9
Card Id Number	Yes	-

At the bottom of the dialog are "OK" and "Cancel" buttons.

### 4.5.2.4 Advanced Encoding Options

You can use this option to select the button for a card technology in order to view and edit the settings for that particular technology. (**Note:** The setting names are different for iCLASS and Prox technologies; consequently, when upgrading from a previous version of Asure ID, those settings must be reapplied - before attempting to encode in Data Entry.)



### 4.5.2.5 RFIDeas

You can change each field's Book, Page, AppArea and Block location. (**Note:** This is done using the Memory Mapping tab described in the **Memory Mapping** section, above.)

### 4.5.2.6 Custom Application Fields

You must specify the Data Field Type, the Name of the field and whether this field are used to Read or Write data (in earlier versions of Asure ID, only Write Access was allowed).

All Asure ID Data Field types except for Lists can be linked to a Custom iDIRECTOR Field.

For Text fields, you can specify how the characters are written to the card. (**Note:** This is done either as ASCII (1 byte) or Unicode (2 byte) characters.)

For Text fields, a character limit will force you to choose a minimum number of blocks. This character limit will also be used when the Data Field is created as the Max Characters for the field. (**Note:** This way you can never attempt to write more memory than you have mapped.)

For Photo and Signature Fields, Max Bytes are used to force you to choose a minimum number of blocks.

**Add iCLASS Application**

**Custom Field Properties**  
Select what Type of Data Field will be linked to this iDIRECTOR field and choose if the field will be written to or read from the card.

**Data Field Type**

- ☒ Text (ASCII)
- ☐ Text (Unicode)
- ☐ Date
- ☐ Yes/No
- ☐ Number
- ☐ Photo
- ☐ Signature

**Field Attributes**

Name: CustomField1

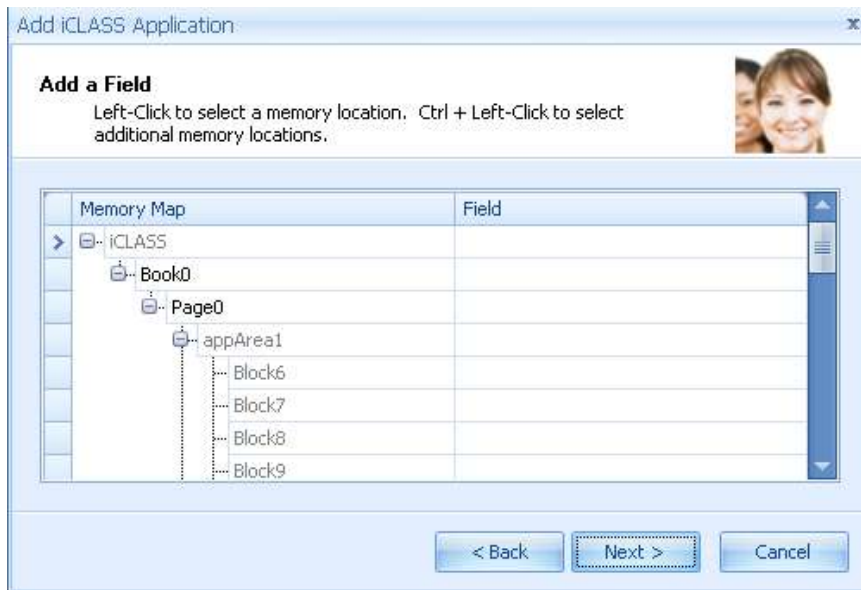
Text Character Limit: 40

**Field Access**

- ☒ Write
- ☐ Read

< Back   Next >   Cancel

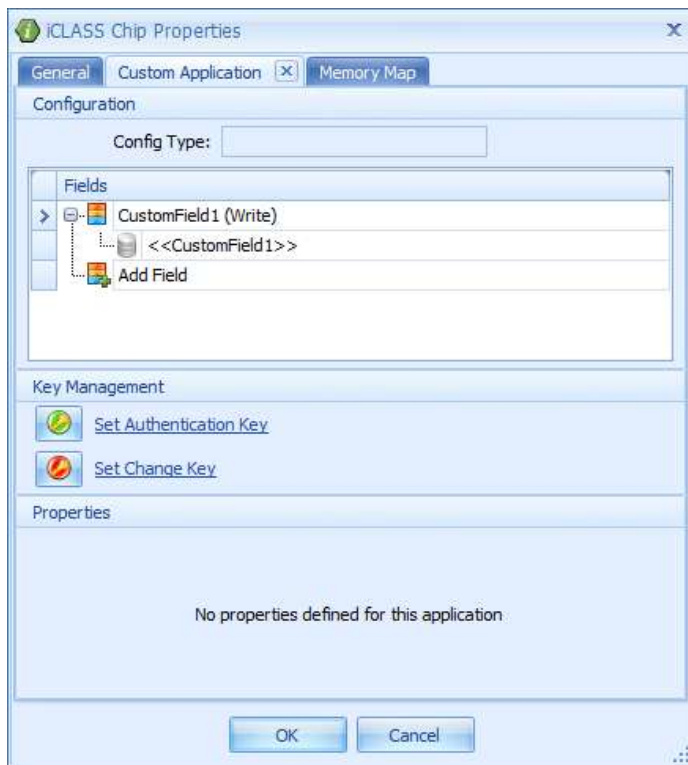
You must specify the Memory Map locations. If you do not select enough blocks to meet the Text Character Limit or the Max Bytes, you are prompted with an error message when you attempt to move on to the next page of the wizard. (**Note:** You cannot proceed until the minimum Max Bytes are met.)



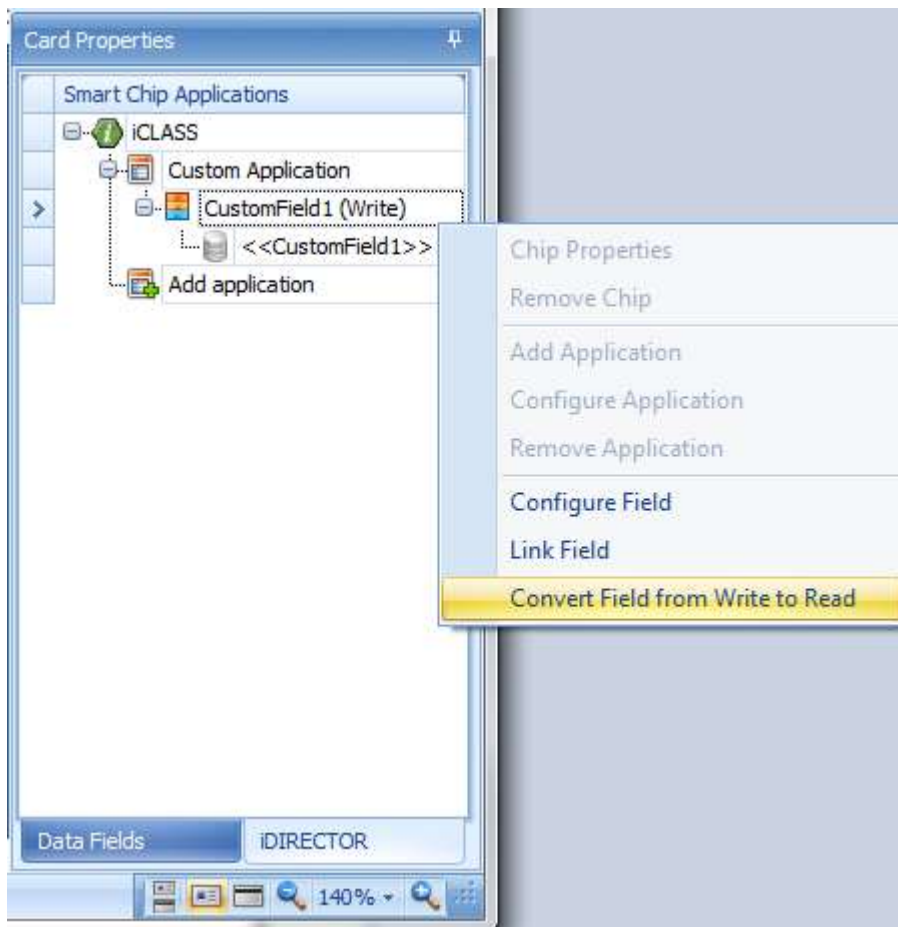
You can add additional fields by double-clicking on the Add Field item in the Fields section of the Custom Application's tab in the iCLASS Chip Properties Dialog (below).

You can remove a field by right-clicking on a field and choosing the "Remove Field" menu item.

You can change each field's Book, Page, AppArea and Block location using the Memory Mapping tab, as described in the **Memory Mapping UI** section (above).



After a Custom Field is added it can later be changed from a field that is written to the card to a field that is read from the card in the iDIRECTOR section of the Card Properties window by right-clicking on the Field and selecting the “Convert Field from Write to Read” menu item.





### 4.5.2.7 Key Management

With this function, you can store the key(s) in the template in Card Design. A key can be applied at the Application level (across all Pages/AppAreas/Blocks) or at specific Page, AppArea or Block.

You have the option to store keys with the template, or provide it at print time.

You have the option to "Activate" or "Deactivate" a key embedded into the template in Card Design.

You can choose how the key entered are used to authenticate the following:

ASCII (single-byte) characters

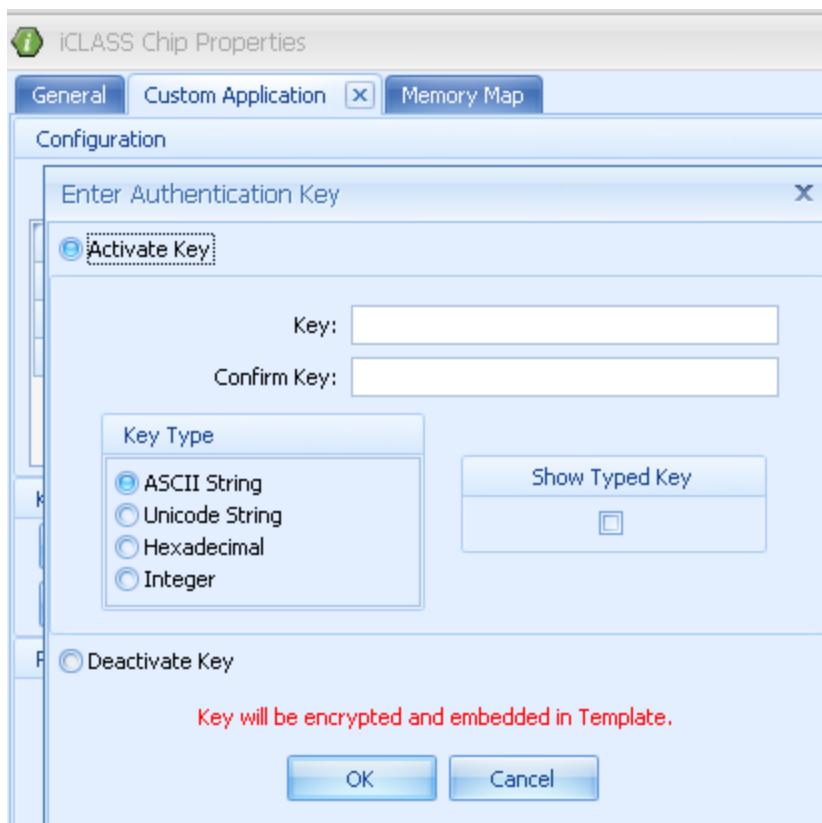
Unicode (two-byte) characters

Hexadecimal - Indicates the string is interpreted as hexadecimal binary input.

Integer - Indicates the string is converted to an unsigned 64-bit integer.

You can check the "Show typed key" checkbox to see the key that you are typing. Each time you opens the Key Management dialog the key will still be masked. So there are no way to "see" a key after it has been entered (once the button **OK** has been pressed).

To accommodate this in Data Entry, enter the key at print time if you do not want to store the key in the template.



### 4.5.2.8 SAM Status and Password Change

If the SAM Status expects a configured card to be used, select YES. If not, select NO.

Add the SAM Data and click **OK** to close the dialog.

For more SAM Status information, refer to: [Appendix C- iCLASS Programming Guide](#)



**SAM Status and Password Change**

**SAM Data**

Card Status: Connected

Unique ID: 5B-01-13-51-28-6E-32-14-35-0F-FF-f

Format Type: H10301 (Std 26 Bit)

Version: 0.22

Available Credentials: 995

Number of Credentials Used: 5

Sales Order Number: 999

Expects Configured Card: Yes

**Actions**

[Change SAM Password](#)

[Refresh](#)

**Order Parameters**

Parameter	User Configurable	Value
> Facility Code	No	9
Card Id Number	No	1

OK

### 4.5.2.9 Backward Compatibility

Old iDIRECTOR objects (from templates created in Asure ID 6.4 and older) will automatically be removed to prevent any unknown side-effects. (Note: No data shall be lost.)


Only the iDIRECTOR objects will need to be re-added and re-linked to the Data Fields on the template, before any encoding operations can be performed.

### 4.5.3 Step by Step Tutorial

Follow these procedures as needed to use the iDIRECTOR feature.

#### 4.5.3.1 Reading the HID Access Data from a Prox card

Step	Procedure
1	From the Enable Smart Chip menu, select the HID Prox menu item.
2	When the Prox Properties dialog appears, press the “Add an Application” hyperlink.
3	From the Add Application Wizard, press the <b>Next</b> button to get started.
4	Choose the HID Access Control application from the list and press the <b>Next</b> button.

	
5	Select the format of the data to be read or press the “Auto Detect...” hyperlink to read the format directly from the Prox card.
6	Press the <b>Next</b> button.
7	<p>If you press the <b>Finish</b> button at this point, a Data Field will be created and mapped to each field defined for the format selected in step 5.</p> <p>Press the <b>Finish</b> button to automatically create the Data Fields and exit the wizard.</p>

### 4.5.3.2 Writing the RFIDEas application to an iCLASS card

Step	Procedure
1	From the Enable Smart Chip menu, select the iCLASS menu item.
2	When the iCLASS Properties dialog appears, select the iCLASS card type (2k, 16k, etc.) or press the “Auto Detect...” hyperlink to determine the card type directly from the iCLASS card. ( <b>Note:</b> This cannot be changed after an application is added, so be sure that this is correct, before proceeding.)
3	Press the “Add an Application” hyperlink.
4	From the Add Application Wizard, press the <b>Next</b> button to get started.
5	Choose the RFIDEas Air ID application from the list and press the <b>Next</b> button.
6	Select the Target Reader Type and press the <b>Next</b> button.
7	Modify the Post Keystroke options in the Application Properties section as in the image below, to get the application to function properly when the card is presented for logical access.
8	If you press the <b>Finish</b> button at this point, a Data Field will be created and mapped for all 3 fields used by the RFIDEas application.  Press the <b>Finish</b> button to automatically create the Data Fields and exit the wizard.

**Add iCLASS Application**

**Application Properties**  
View or modify the applications properties.

Credential Signature	
Pre Key Strokes of Credential1	
Post Key Strokes of Credential1	TAB
Pre Key Strokes of Credential2	
Post Key Strokes of Credential2	TAB
Pre Key Strokes of Card Gone	
Post Key Strokes of Card Gone	ENTER

< Back    Next >    Cancel

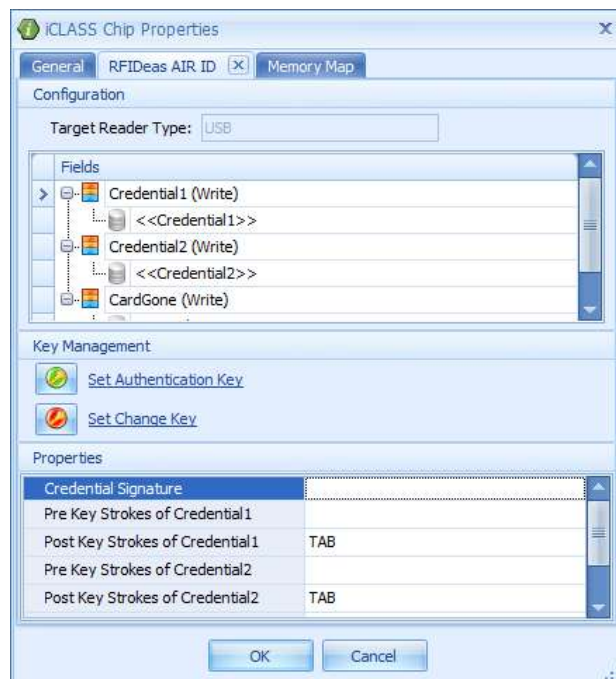
### 4.5.3.3 Changing the MemoryMap for the RFIDEas application

Step	Procedure
1	After an RFIDEas application is added, then fields for the RFIDEas application will appear in the Memory Map tab of the iCLASS properties dialog.
2	Select the Memory Map tab.
3	Click and drag the field to its desired new memory location. ( <b>Note:</b> Invalid memory locations will be restricted.)  Depending on the card type (2k, 16k, etc.), the field may take up more memory slots when moved to an application area with more memory available, or less when moved to a memory location with less memory available.
4	When the <b>OK</b> button is pressed on the iCLASS properties dialog, the changes will be applied.

### 4.5.3.4 Setting an Authentication Key

This is used by Asure ID to authenticate an iCLASS application area. This should only be used for cards that have had application areas or sectors written to previously and have had the default key(s) for those application areas or sectors changed.

Step	Procedure
1	After an application is added press the Set Authentication Key hyperlink.



Step	Procedure
2	Select the <b>Activate Key</b> radio button and enter the key into the Key and Confirm Key text fields.

Enter Authentication Key

☒ Activate Key

Key:

Confirm Key:

Key Type

☒ ASCII String

☐ Unicode String

☐ Hexadecimal

☐ Integer

Show Typed Key ☐

☐ Deactivate Key

Key will be encrypted and embedded in Template.

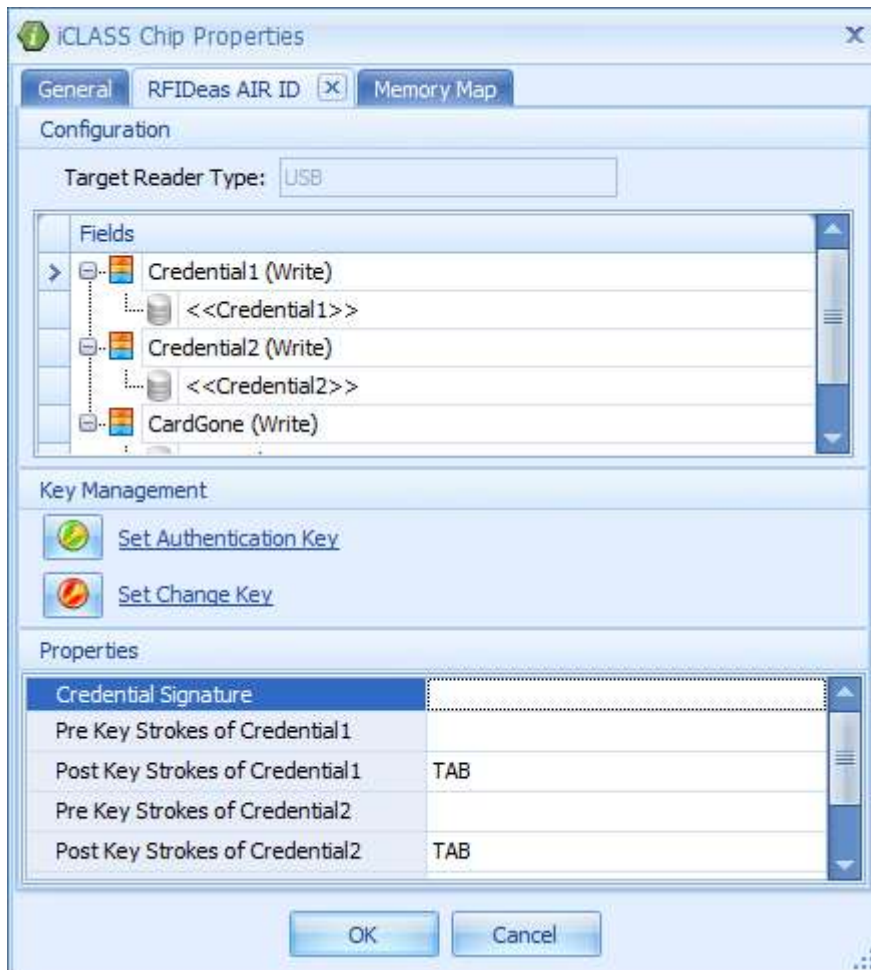
OK Cancel

Step	Procedure
3	Use the options in the Key Type group to set how the key will be encoded for authentication.
4	Press <b>OK</b> to embed this key into the template (encrypted). ( <b>Note:</b> This ensures that you will not be prompted to enter the key when the card is printed/encoded. If the key is entered incorrectly, you will be prompted at print/encode time for the proper key.)

### 4.5.3.5 Setting the Change Key

This will be applied to an iCLASS application area when the card is printed/encoded.

Step	Procedure
1	After an application is added press the Set Change Key hyperlink.



Step	Procedure
2	Select the <b>Activate Key</b> radio button and enter the key into the Key and Confirm Key text fields.



Enter Authentication Key

☒ Activate Key

Key:

Confirm Key:

Key Type

☒ ASCII String

☐ Unicode String

☐ Hexadecimal

☐ Integer

Show Typed Key ☐

☐ Deactivate Key

Key will be encrypted and embedded in Template.

OK Cancel

Step	Procedure
3	Use the options in the Key Type group to set how the key will be encoded to the application area.
4	<p>Press <b>OK</b> to embed this key into the template (encrypted). (<b>Note:</b> This is the key that will be written to the card, when the card is printed/encoded.)</p> <p>(<b>Note:</b> If a key already exists at this application area, it must be authenticated to, prior to writing the new key. See the section “Setting the Authentication Key used by Asure ID to authenticate an iCLASS application area” for more information on this.)</p>

## 4.6 Using a 3<sup>rd</sup> Party Command-Line Application to Encode Data to a Card

As an extension to iDIRECTOR Smart Card Encoding, this feature is intended to allow for a stand-alone encoding or encoding and printing, via an established command line interface of a third-party provider. Without this capability, all encoding of cards with Asure ID must happen through the built in iDIRECTOR driven encoding functionality.

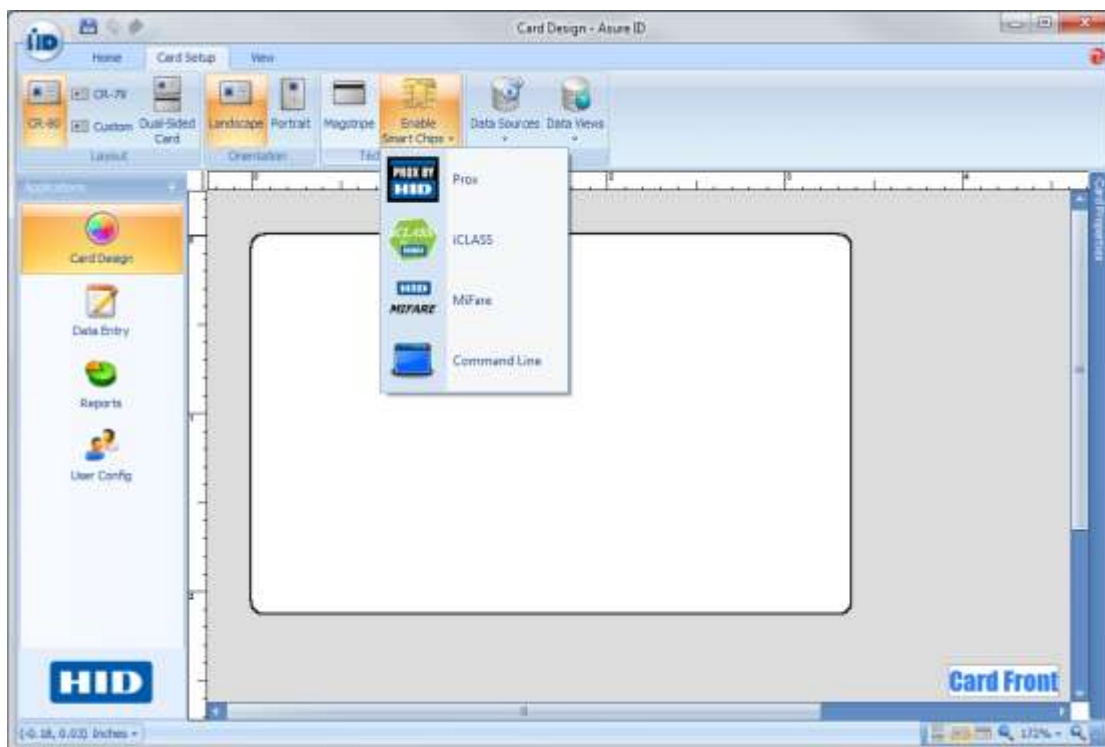
This feature supports the sending of a configurable card docking command, prior to the encoding operation. In addition to PROX, Contactless (iCLASS and MiFare), move commands, 3<sup>rd</sup> party command-line applications support move to Contact station.

Feedback from the 3<sup>rd</sup> party application is used to determine success or failure of the encoding operation as well as optional error messages that can be displayed to the user, in the event of a malfunction.

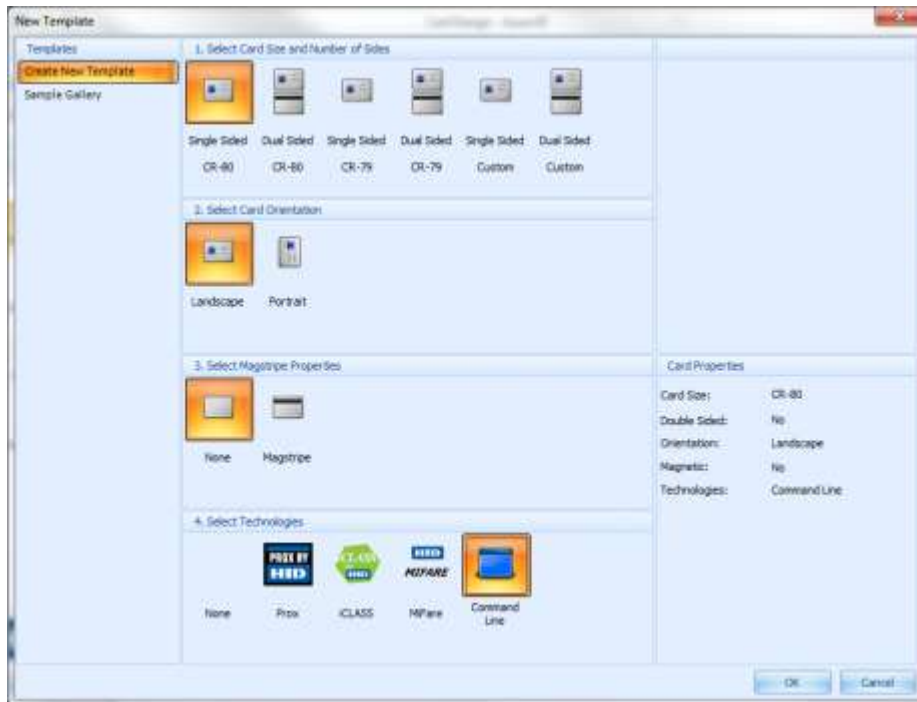
Input to the application can be configured using optional parameters to mine data from Asure ID and send it to the application.

### Card Design Configuration

A command line application can be added to a template in card design in 2 ways. Via the Enable Smart Chips menu on the Setup tab:



Or, by selecting the Command-Line icon in the New Template dialog.



Selecting either of these icons will present the user with a wizard for adding the 3<sup>rd</sup> party technology to the template.



1. Press Next on the wizard's welcome page.
2. You will be presented with the Application Configuration page.

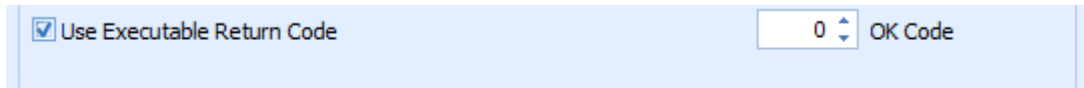
The screenshot shows a window titled "Command-Line Application Wizard" with a close button (X) in the top right corner. The main heading is "Application Configuration" with the instruction "Configure the application you would like to add." Below this, there are several input fields and options:

- Executable Path:** A text box with a "Browse..." link to its right.
- Return File Path:** A text box with a "Browse..." link to its right.
- Printer Feed Command:** A dropdown menu currently showing "Contact".
- Post Feed Delay:** A numeric spinner box set to "0" followed by the text "in milliseconds".
- Options:** A section containing several checkboxes:
  - ☒ Add quotation marks around parameters
  - ☐ Suppress error messages
  - ☐ Continue on User Prompt
  - ☐ Use Executable Return Code
  - ☐ Space Character Before Parameter Value
- OK Code:** A numeric spinner box set to "0" with the text "OK Code" to its right.

At the bottom of the window are three buttons: "< Back", "Next >" (which is highlighted with a dashed border), and "Cancel".

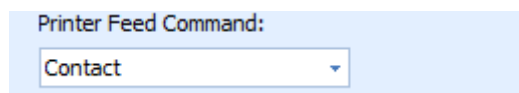
3. Specify the location of the third-party executable program that performs encoding as installed on the machine running Asure ID in the "Executable Path" text box. Use the Browse link to surf to the location of the third party executable if that is easier.
4. Specify the "Return File Path" if a Windows File will be used as the mechanism for returning the results of the encoding operation. If the Windows File is to be used, it will need to contain the text "OK" when the encoding operation is successful. On encoding operation failure, this same return file can be used as the source for an error message to be displayed to the user (if "Suppress error messages checkbox is **not checked**).
5. Check the "Suppress error messages" check box, if you would **not** like any error feedback presented to the user (not recommended)

6. Check the “Continue on User Prompt” to force the user to press a button on a popup dialog to continue the print process after encoding is completed (regardless of error status)



A screenshot of a software interface showing a checkbox labeled "Use Executable Return Code" which is checked. To its right is a text box containing the number "0" and a label "OK Code".

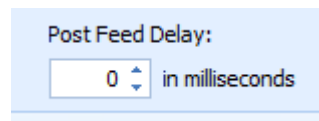
7. Check the “Use Executable Return Code” check box to use the command line executable RETURN code to determine success or failure, instead of using the return file. Read the vendor documentation, to determine what, if any, return codes the application uses. The OK Code text box shown above allows the user to configure the value that will be interpreted as “success”. If this box is not checked, then the “Return File Path” must be used to determine success or failure of the encoding operation.
8. Check the “Space Character Before Parameter Value” checkbox, if a space is required between the Command Prefix and the command’s value.



A screenshot of a software interface showing a dropdown menu labeled "Printer Feed Command:". The dropdown is open, showing the option "Contact".

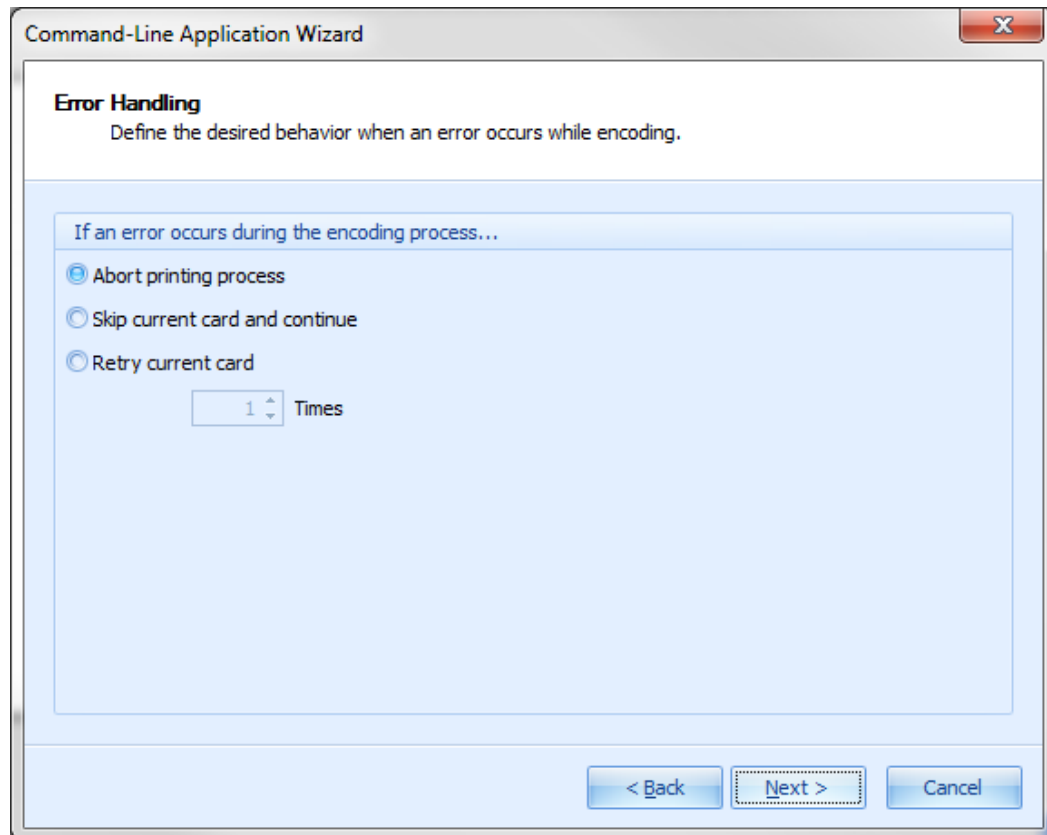
9. Choose which printer feed command will be sent to the printer to dock the card, prior to calling the command-line encoding application. The options are as follows
  - a. Prox
  - b. Contactless (iCLASS and MiFare)
  - c. Contact
  - d. None

If the 3<sup>rd</sup> party application will send the move command to the printer, then select “None” from the list.

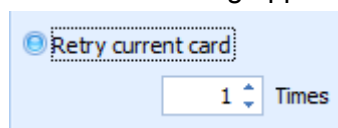


A screenshot of a software interface showing a spinner control labeled "Post Feed Delay:". The spinner is set to "0" and has a label "in milliseconds".

10. The timing of the encoding operation following the feed operation can be configured (in milliseconds) in the “Post Feed Delay” section above. Asure ID does not wait until the card is docked to call the 3<sup>rd</sup> party after application after issuing the feed command. If this delay is not specified, the application may be called before the card is docked.
11. Press “Next” to go to the Error Handling page.



- a. Select the “Abort printing process” radio button to abort the current and all subsequent cards (during batch prints), in the event an error is returned from the encoding application.
- b. Select the “Skip current card and continue” radio button to skip the current card and continue printing the subsequent cards (during batch prints), in the event an error is returned from the encoding application.



- c. Select the “Retry current card” radio button to retry the encoding operation a specified number of times in the event an error is returned from the encoding application. Use the number edit field, pictured above, to specify the number of times to retry the card.

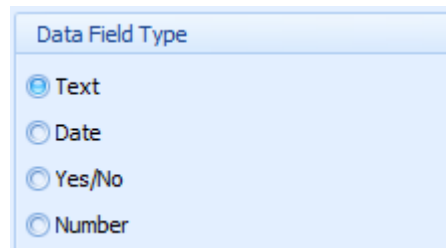
12. Press Next to go to the Add Parameter page of the wizard. Select the type of parameter to output to the command line after the application's executable path.

The screenshot shows a window titled "Command-Line Application Wizard" with a close button in the top right corner. The main heading is "Add Parameter" with a subtitle "Add a parameter which will be output to the command-line at encoding time." Below this, there are two sections. The first section, "Parameter Type", contains five radio button options: "Static Text" (which is selected), "Database", "User Prompt", "Batch Print Counter", and "Global Print Counter". The second section, "Parameter Configuration", contains two text input fields: "Command Prefix:" and "Command Text:". At the bottom right of the window are three buttons: "< Back", "Next >", and "Cancel".

**Static Text** is a parameter that will be output to the command-line and will not change for all encoded cards. The Command Prefix and the Command Text will be output with a space between them.

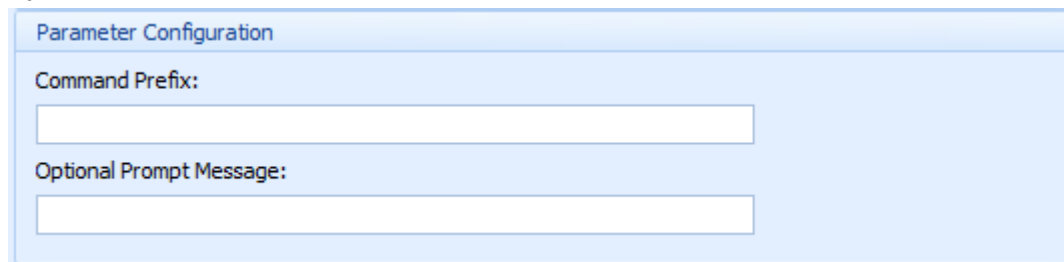
This is a close-up of the "Parameter Configuration" section from the wizard. It shows two text input fields. The first is labeled "Command Prefix:" and the second is labeled "Command Text:". Both fields are currently empty.

**Database** is for a parameter that is retrieved from the card record data at run time, and is based on a field name matching the template field name from the card template. This will fetch the specific data item from the template's values for a card and pass that as if it were literal text directly to the third party encoding application on the command line through a named parameter. Select the type of data field to use. This field will be automatically created when the wizard is complete.

A dialog box titled "Data Field Type" with a light blue background. It contains four radio button options: "Text" (selected), "Date", "Yes/No", and "Number".

Data Field Type
<input checked="" type="radio"/> Text
<input type="radio"/> Date
<input type="radio"/> Yes/No
<input type="radio"/> Number

**User Prompt** allows for the user to be prompted to enter a value at runtime, for each card being encoded. This value will not be stored in the Asure ID database. Enter the "Optional Prompt Message" to present the user with a custom message when they are prompted for the input.

A dialog box titled "Parameter Configuration" with a light blue background. It contains two text input fields. The first is labeled "Command Prefix:" and the second is labeled "Optional Prompt Message:".

Parameter Configuration
Command Prefix: <input type="text"/>
Optional Prompt Message: <input type="text"/>

**Batch Print Counter** will pass in the value of the current batch print counter. This counter is reset prior to each batch print operation.

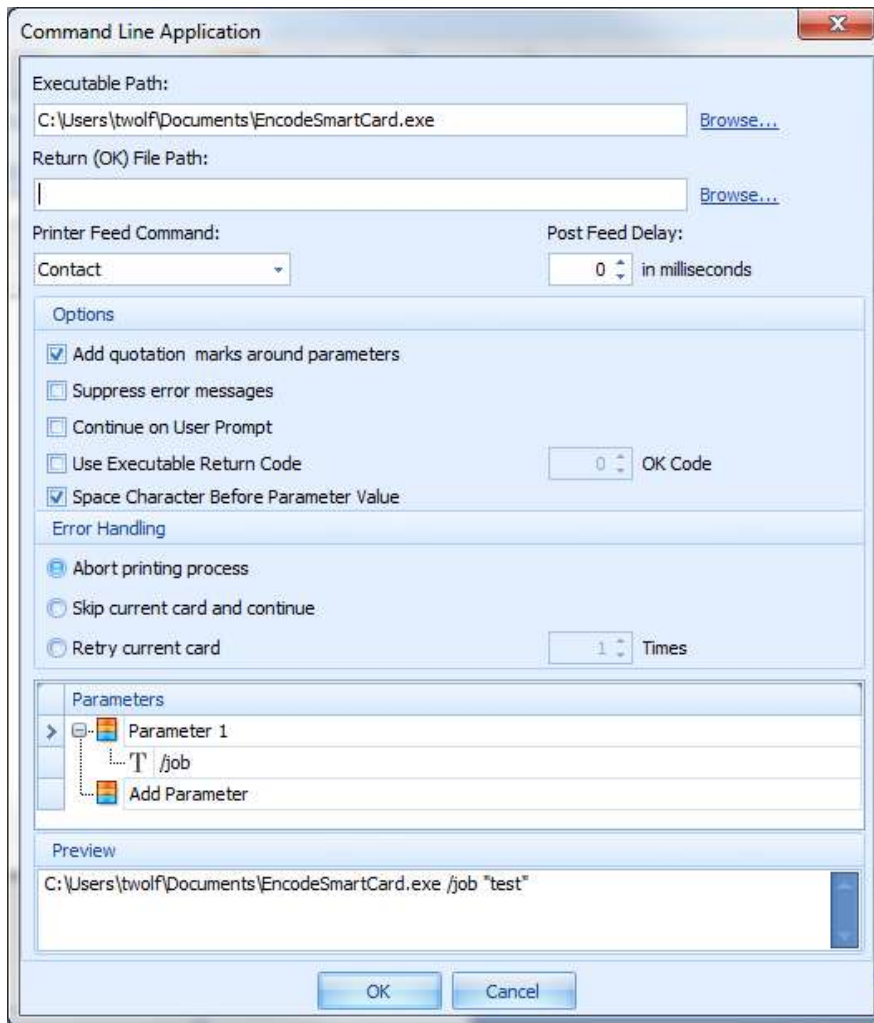
**Global Print Counter** will pass in the value of the global print counter. This counter is *not* reset prior to each batch print operation, but *is* reset each time the application is restarted.

13. After choosing a parameter type and configuring the parameter, Press Next.
14. Press Finish to complete the wizard.





15. You will be presented with the Command-Line application dialog.
16. Add any additional parameters needed by double-clicking the "Add Parameter" link in the Parameters section. Remove incorrect or unnecessary parameters by right clicking and selecting "Remove Parameter".
17. Review your changes in the sample Preview section to see how the output will likely be output to the command-line.



18. Press OK to add the Command-Line application technology object to the template.

19. Notice the object is added to the Smart Chip Applications area of the Card Properties window.




## 4.7 Live Link

Follow this procedure.

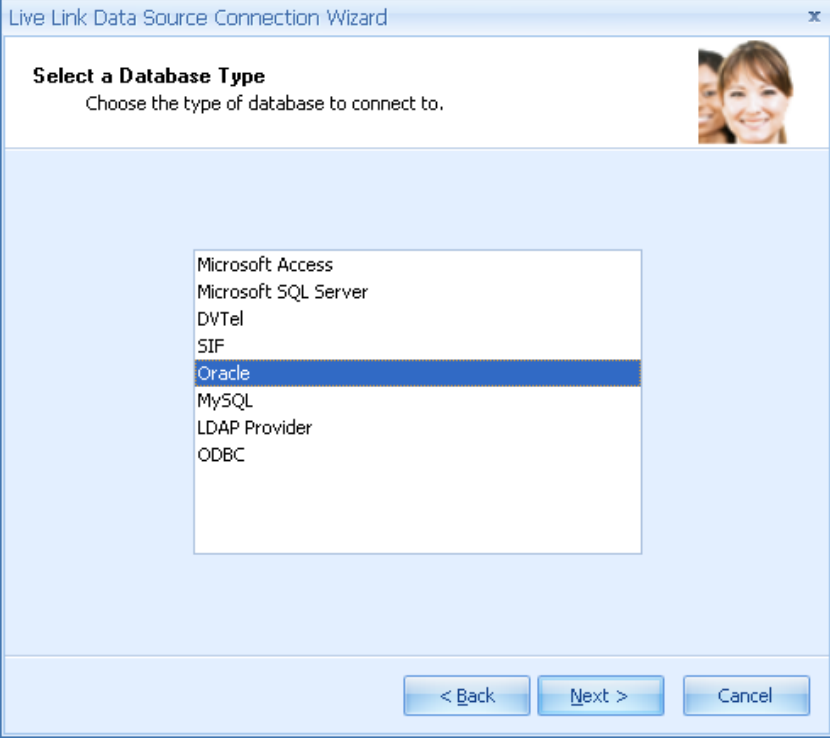
Step	Procedure
1	<p>You can add, edit and delete records for these specific scenarios:</p> <p>A single data source exists on the template. (<b>Note:</b> This can be native database or Live Link.)</p> <p>One Live Link table has been identified as primary and the Native database.</p> <p>Multiple Live Link tables and or data sources on the same template will be for <u>edit only</u>. (<b>Note:</b> No adds or deletes will be allowed into the database in these Live Link tables.)</p> <p>You should include any number of fields that will be appended or added to the existing data using the native database. (<b>Note:</b> These fields can be added, updated or deleted.)</p> <p>DVTel solution allows adds (new records), edits and deletes. (<b>Note:</b> You can delete a record without removing the data, but changes the status of the card holder. No other data source can be used with DVTel, including the Native database.)</p> <p>LDAP will be read only and it cannot be used with any other data source, including Native database.</p>

## 4.7.1 Setting up Live Link

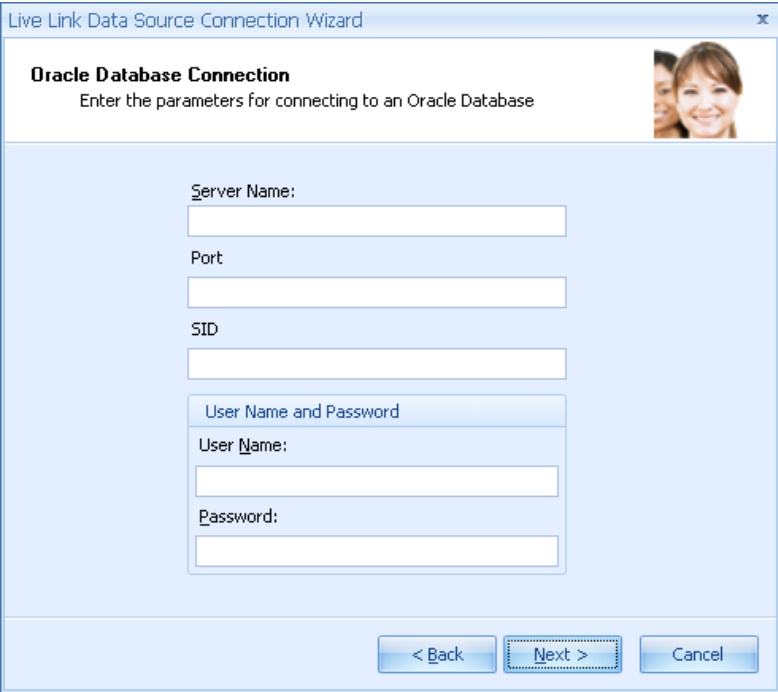
Step	Procedure
1	<p>Information needed to SETUP Live Link</p> <p>Contact the database administrator to get connection string parameters for Live Link connections.</p> <p>Have the database user/password for the database you want to use.</p> <p>The defined users can have Select, Update, Insert and/or Delete privileges for the tables they will use with Asure ID 7. No other privileges are needed.</p> <p>The administrator will decide if the user can modify data through Asure ID or not modify it; and assign privileges to the database user to manage data integrity.</p> <p>In every Live Link connection users will see whatever objects have been assigned to the database username. Security is managed on the database side not within AsureID.</p> 

**Oracle and DVTel** will require client installations in order for Live Link to work.

Oracle can use any client package that works with your version of DB for either 9i or 11g.

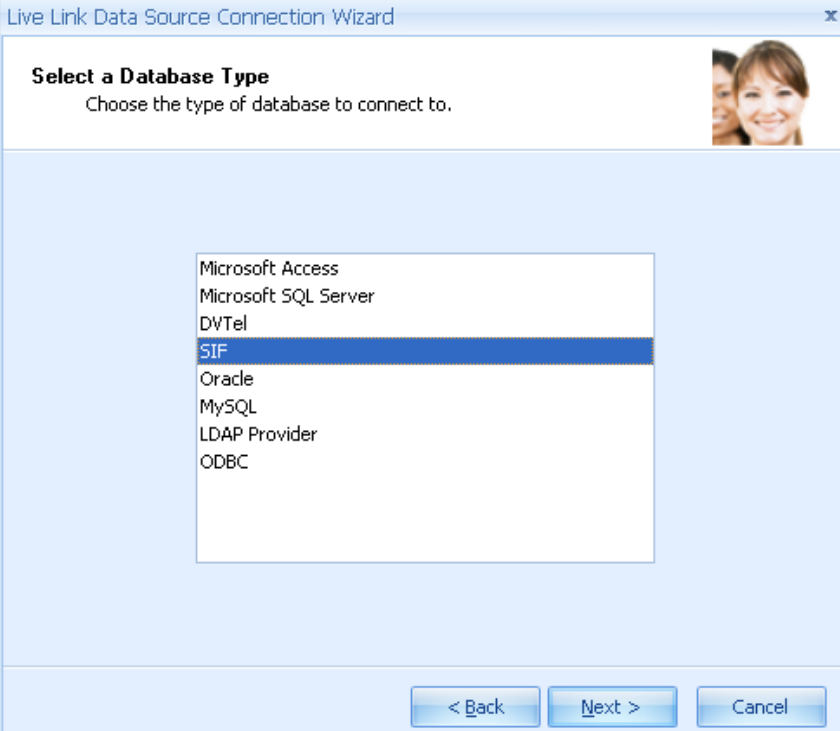


The screenshot shows the 'Live Link Data Source Connection Wizard' dialog box. The title bar reads 'Live Link Data Source Connection Wizard'. The main heading is 'Select a Database Type' with the instruction 'Choose the type of database to connect to.' Below this is a list box containing the following options: Microsoft Access, Microsoft SQL Server, DVTel, SIF, Oracle (highlighted with a blue selection bar), MySQL, LDAP Provider, and ODBC. At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.



The screenshot shows the 'Live Link Data Source Connection Wizard' dialog box at the 'Oracle Database Connection' step. The title bar reads 'Live Link Data Source Connection Wizard'. The main heading is 'Oracle Database Connection' with the instruction 'Enter the parameters for connecting to an Oracle Database'. Below this are several input fields: 'Server Name:', 'Port', 'SID', and a section titled 'User Name and Password' containing 'User Name:' and 'Password:' fields. At the bottom right are three buttons: '< Back', 'Next >' (which is highlighted with a dashed border), and 'Cancel'.

SIF is purchased as a separate program to support the School Interoperability Framework.

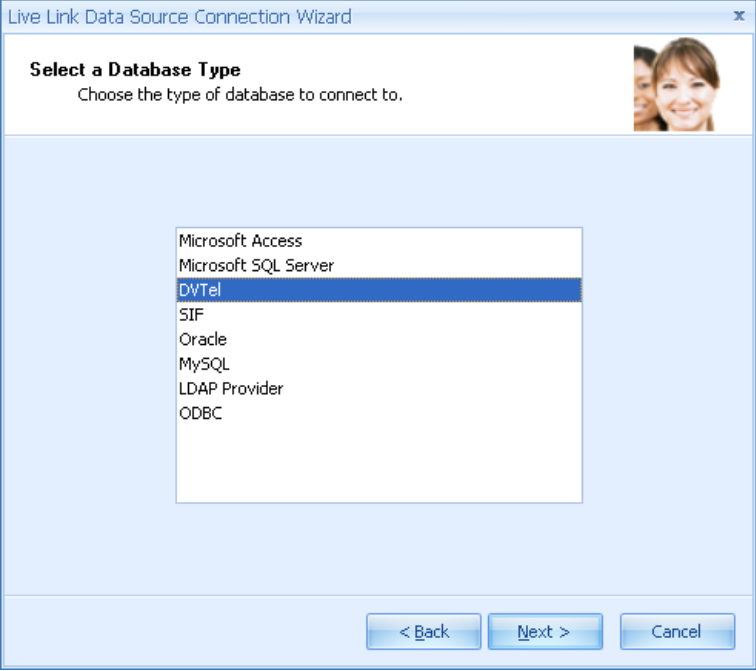


The screenshot shows the 'Live Link Data Source Connection Wizard' dialog box. The title bar reads 'Live Link Data Source Connection Wizard'. The main heading is 'Select a Database Type' with the instruction 'Choose the type of database to connect to.' Below this is a list box containing the following options: Microsoft Access, Microsoft SQL Server, DVTel, SIF (which is highlighted with a blue selection bar), Oracle, MySQL, LDAP Provider, and ODBC. At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

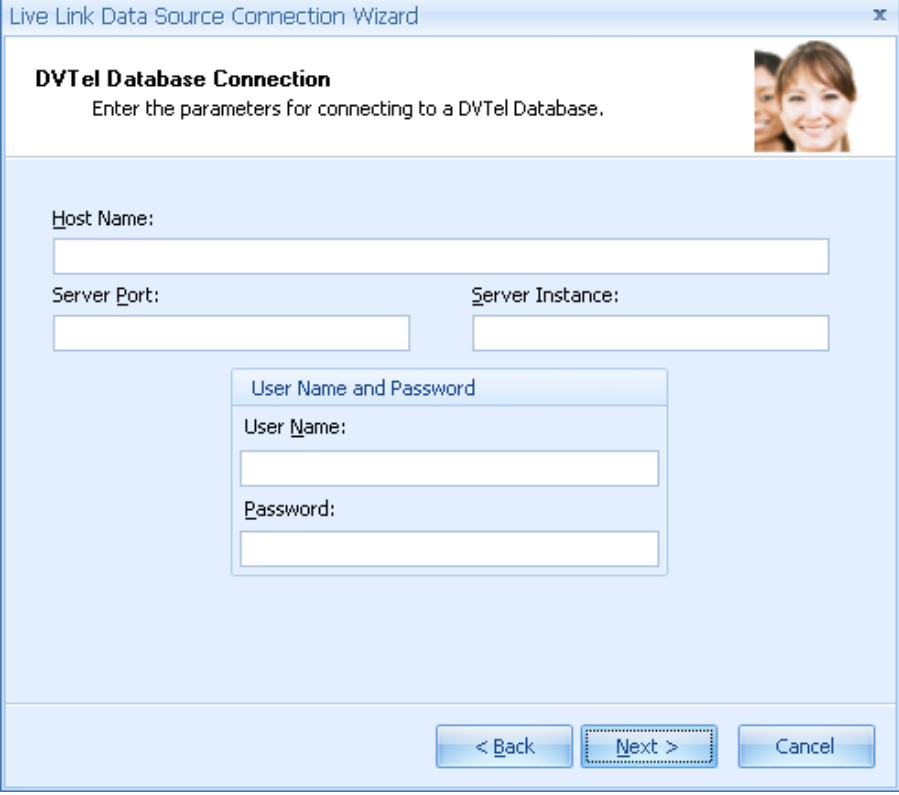


The screenshot shows the 'Live Link Data Source Connection Wizard' dialog box at the 'SIF Connection' step. The title bar reads 'Live Link Data Source Connection Wizard'. The main heading is 'SIF Connection' with the instruction 'Enter the parameters for connecting to a SIF Database'. The form contains the following fields and controls: 'Server Name:' with a dropdown menu showing 'HJS-FARGO\'; 'Initial Catalog:' with an empty text box; a checkbox labeled 'Use Integrated Security' which is unchecked; a section titled 'User Name and Password' containing 'User Name:' and 'Password:' labels, each followed by an empty text box. At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

DVTel will provide the client package to your users. DVTel will use a Sybase 9.02 client provided by DVTel.

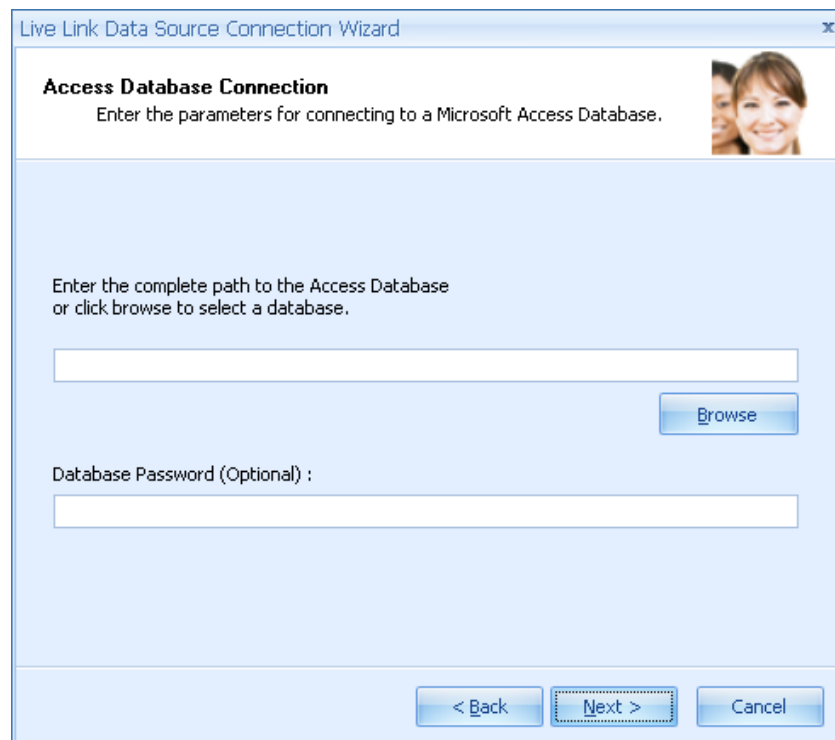
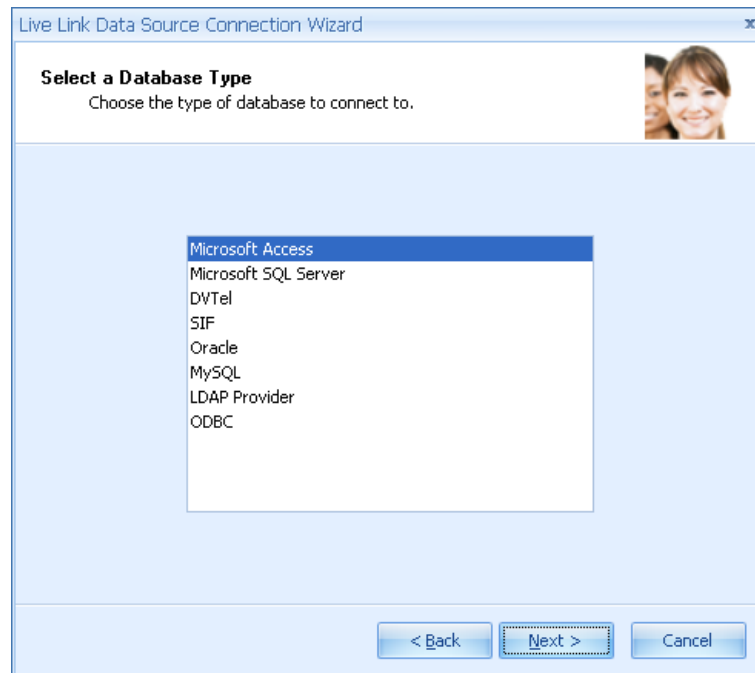


The screenshot shows the 'Live Link Data Source Connection Wizard' window. The title bar reads 'Live Link Data Source Connection Wizard'. The main heading is 'Select a Database Type' with the instruction 'Choose the type of database to connect to.' Below this is a list box containing the following options: Microsoft Access, Microsoft SQL Server, DVTel (which is highlighted with a blue selection bar), SIF, Oracle, MySQL, LDAP Provider, and ODBC. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.



The screenshot shows the 'Live Link Data Source Connection Wizard' window at the 'DVTel Database Connection' step. The title bar reads 'Live Link Data Source Connection Wizard'. The main heading is 'DVTel Database Connection' with the instruction 'Enter the parameters for connecting to a DVTel Database.' Below this are several input fields: 'Host Name:' with a text box, 'Server Port:' with a text box, and 'Server Instance:' with a text box. A sub-section titled 'User Name and Password' contains 'User Name:' and 'Password:' text boxes. At the bottom right, there are three buttons: '< Back', 'Next >' (which is highlighted with a dashed border), and 'Cancel'.


Access, MySQL and SQLServer will not need additional client installs.





Live Link Data Source Connection Wizard

**Select a Database Type**  
Choose the type of database to connect to.



Microsoft Access  
Microsoft SQL Server  
DVTel  
SIF  
Oracle  
**MySQL**  
LDAP Provider  
ODBC

< Back   Next >   Cancel

Live Link Data Source Connection Wizard

**MySQL Database Connection**  
Enter the parameters for connecting to a MySQL database



Server Name:

Database Name:

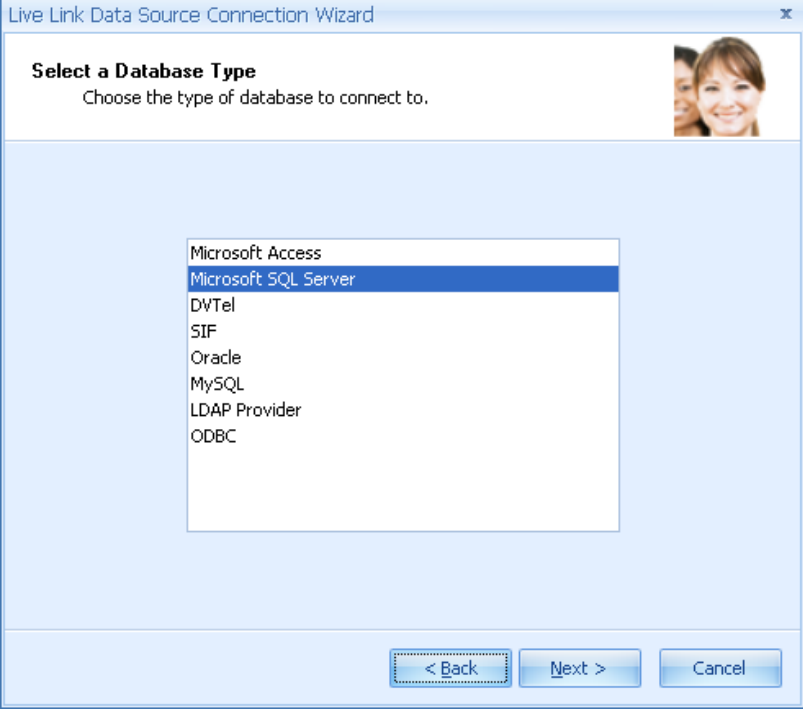
Port:

User Name and Password

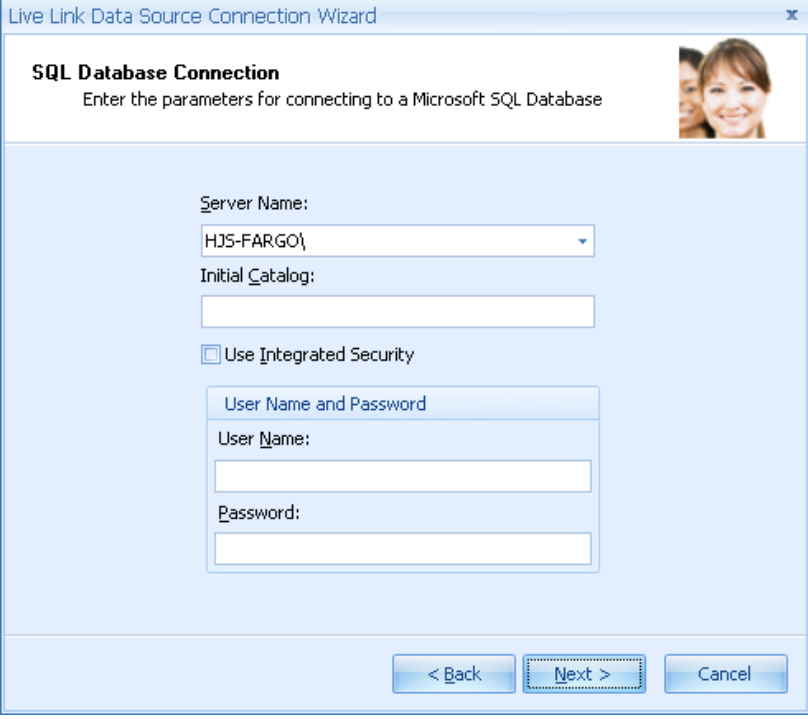
User Name:

Password:

< Back   Next >   Cancel

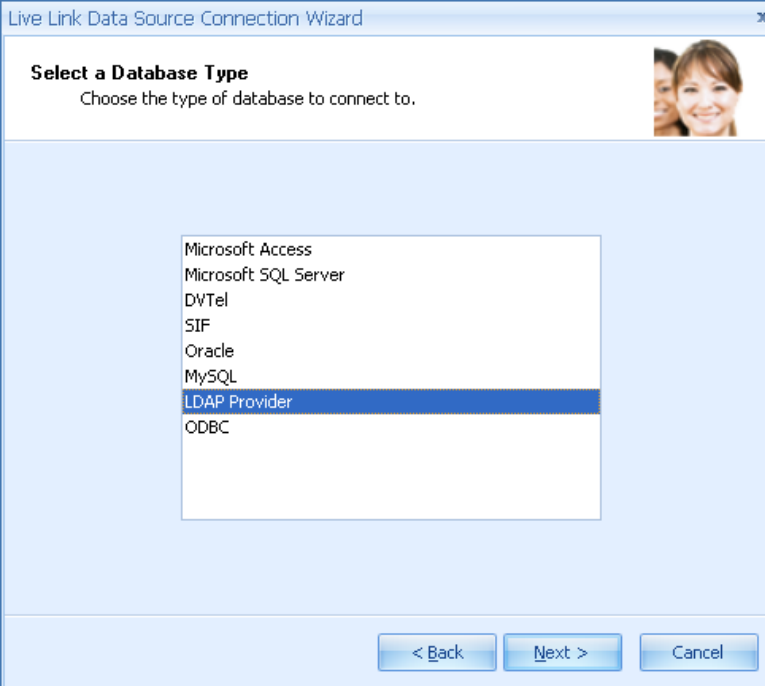


The screenshot shows the 'Live Link Data Source Connection Wizard' window. The title bar reads 'Live Link Data Source Connection Wizard'. The main heading is 'Select a Database Type' with the instruction 'Choose the type of database to connect to.' Below this is a list box containing the following options: Microsoft Access, Microsoft SQL Server (which is highlighted), DVTel, SIF, Oracle, MySQL, LDAP Provider, and ODBC. At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

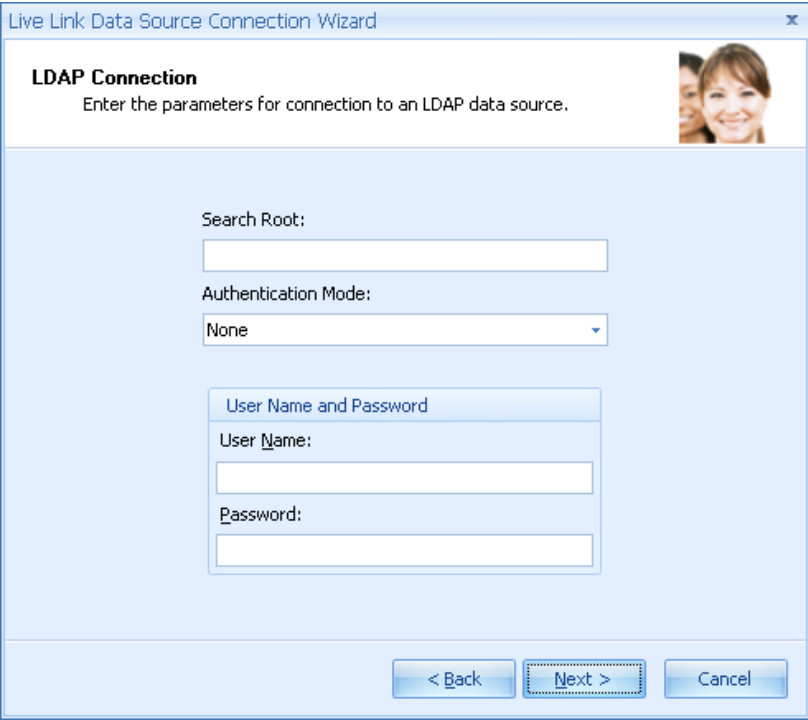


The screenshot shows the 'Live Link Data Source Connection Wizard' window at the 'SQL Database Connection' step. The title bar reads 'Live Link Data Source Connection Wizard'. The main heading is 'SQL Database Connection' with the instruction 'Enter the parameters for connecting to a Microsoft SQL Database'. Below this are several input fields: 'Server Name:' with a dropdown menu showing 'HJS-FARGO\'; 'Initial Catalog:' with an empty text box; a checkbox labeled 'Use Integrated Security' which is unchecked; a section titled 'User Name and Password' containing 'User Name:' and 'Password:' text boxes. At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

LDAP will not need any additional client software.



The screenshot shows a Windows-style dialog box titled "Live Link Data Source Connection Wizard". The main heading is "Select a Database Type" with the instruction "Choose the type of database to connect to." Below this is a list box containing the following options: Microsoft Access, Microsoft SQL Server, DVTel, SIF, Oracle, MySQL, LDAP Provider (which is highlighted with a blue selection bar), and ODBC. At the bottom right are three buttons: "< Back", "Next >", and "Cancel".



The screenshot shows the same dialog box, now at the "LDAP Connection" step. The instruction is "Enter the parameters for connection to an LDAP data source." The form contains the following fields: a "Search Root:" text box, an "Authentication Mode:" dropdown menu currently set to "None", and a section titled "User Name and Password" which includes a "User Name:" text box and a "Password:" text box. At the bottom right are three buttons: "< Back", "Next >" (which is highlighted with a dashed border), and "Cancel".

The image displays two sequential screenshots of the 'Live Link Data Source Connection Wizard' application window.

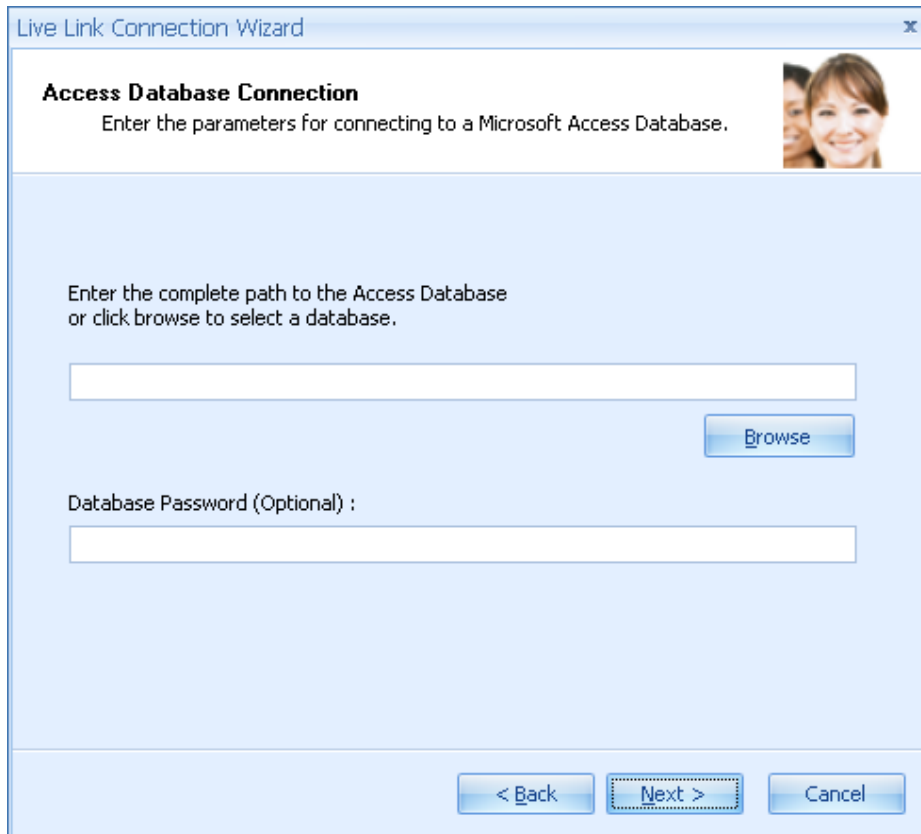
**Top Screenshot: Select a Database Type**

The window title is 'Live Link Data Source Connection Wizard'. The main heading is 'Select a Database Type' with the instruction 'Choose the type of database to connect to.' A small photo of a smiling woman is in the top right corner. A list box contains the following options: Microsoft Access, Microsoft SQL Server, DVTel, SIF, Oracle, MySQL, LDAP Provider, and ODBC. The 'ODBC' option is currently selected and highlighted in blue. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

**Bottom Screenshot: ODBC Data Connection**

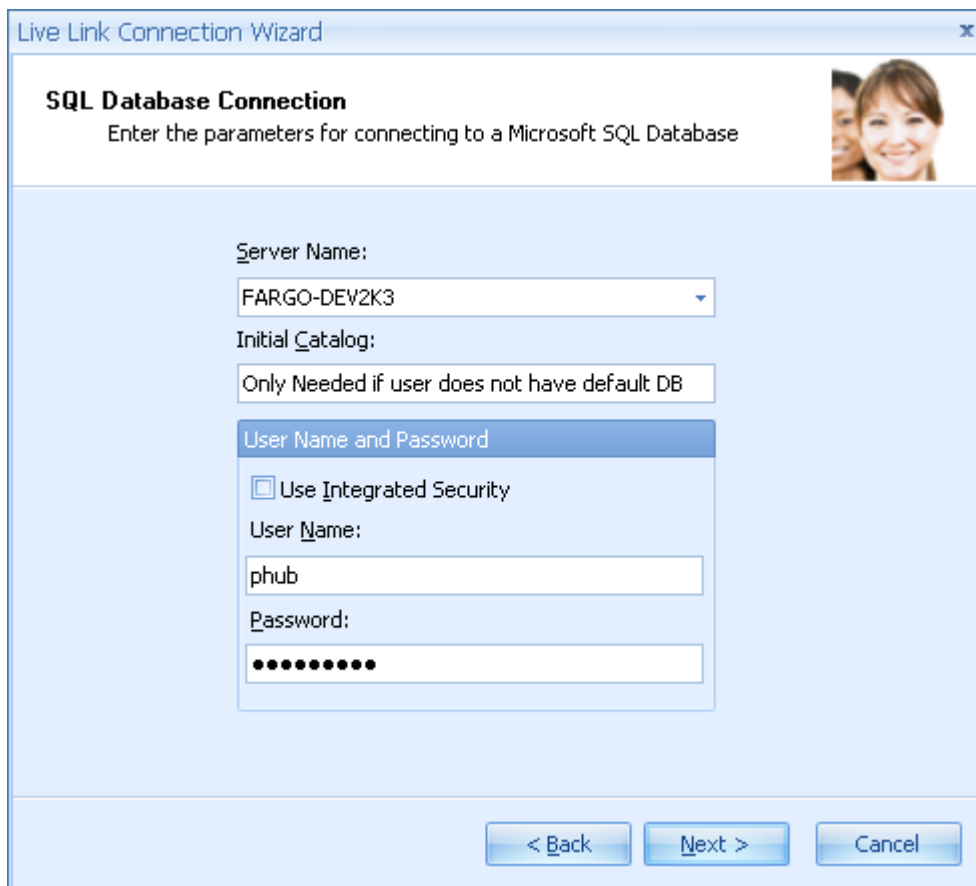
The window title is 'Live Link Data Source Connection Wizard'. The main heading is 'ODBC Data Connection' with the instruction 'Select an ODBC Connection.' The same photo of the smiling woman is in the top right corner. Below the heading is a label 'Select an ODBC Connection:' followed by a dropdown menu. Below the dropdown is a checked checkbox labeled 'Requires User Name and Password:'. Underneath this checkbox is a section titled 'User Name and Password' containing two input fields: 'User Name:' and 'Password:'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

2	From Card Setup, select <b>Add a Data Source</b> .
3	Click <b>Next</b> to continue.
4	Select the Database Type from the list for your appropriate connection.
5	When using the <b>Access</b> Database Type, other than the Native Database. ( <b>Note: Browse</b> to the database using your appropriate password (optional).)



The screenshot shows a window titled "Live Link Connection Wizard" with a close button (X) in the top right corner. The main heading is "Access Database Connection" with a sub-instruction: "Enter the parameters for connecting to a Microsoft Access Database." To the right of the text is a small image of a smiling woman. Below the instruction, there is a text box for the database path with the prompt "Enter the complete path to the Access Database or click browse to select a database." To the right of this text box is a "Browse" button. Below the path text box is another text box for the "Database Password (Optional) :". At the bottom of the window are three buttons: "< Back", "Next >" (which is highlighted with a dashed border), and "Cancel".

Step	Procedure
6	<p>When using <b>SQL Server</b> Database Type, you will need the following:</p> <p><b>Server Name:</b> This is where the SQLServer database resides.</p> <p><b>Initial Catalog:</b> This is needed if you do not have a default database. This may be left empty. (optional)</p> <p><b>User Name:</b> This is the database username defined by the data administrator at the site.</p> <p><b>Password:</b> This is the password associated with the username.</p>



Live Link Connection Wizard

**SQL Database Connection**  
Enter the parameters for connecting to a Microsoft SQL Database

Server Name:  
FARGO-DEV2K3

Initial Catalog:  
Only Needed if user does not have default DB

User Name and Password

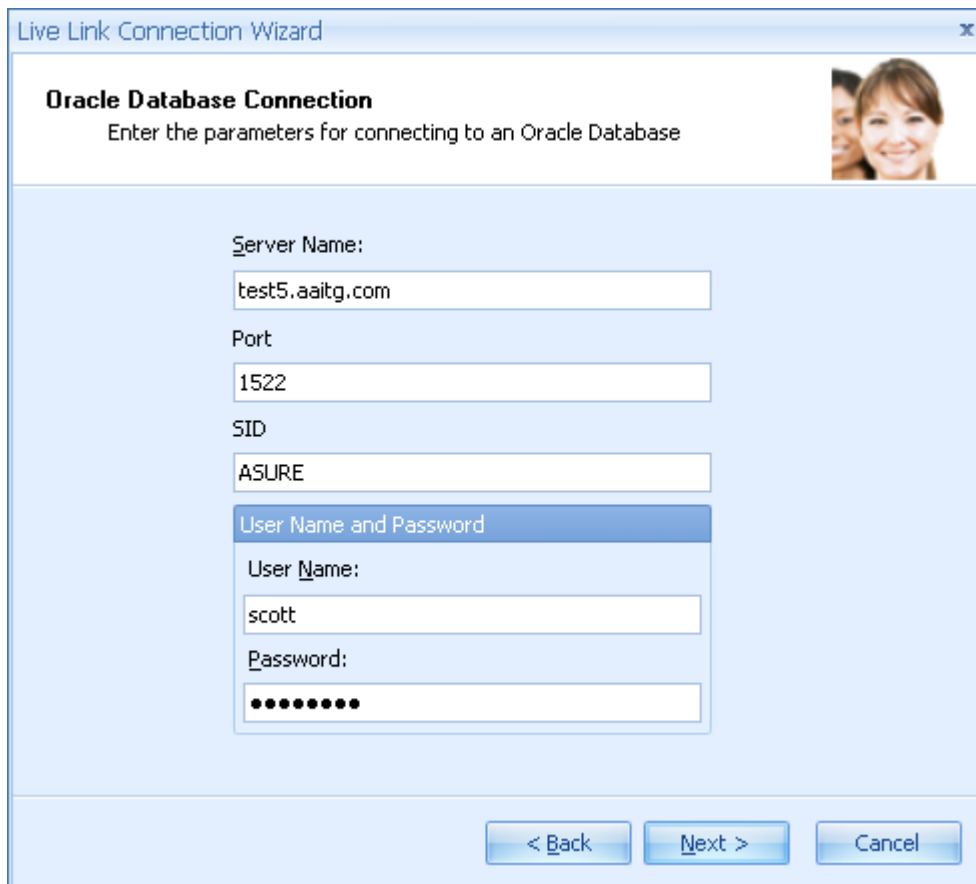
☐ Use Integrated Security

User Name:  
phub

Password:  
••••••••

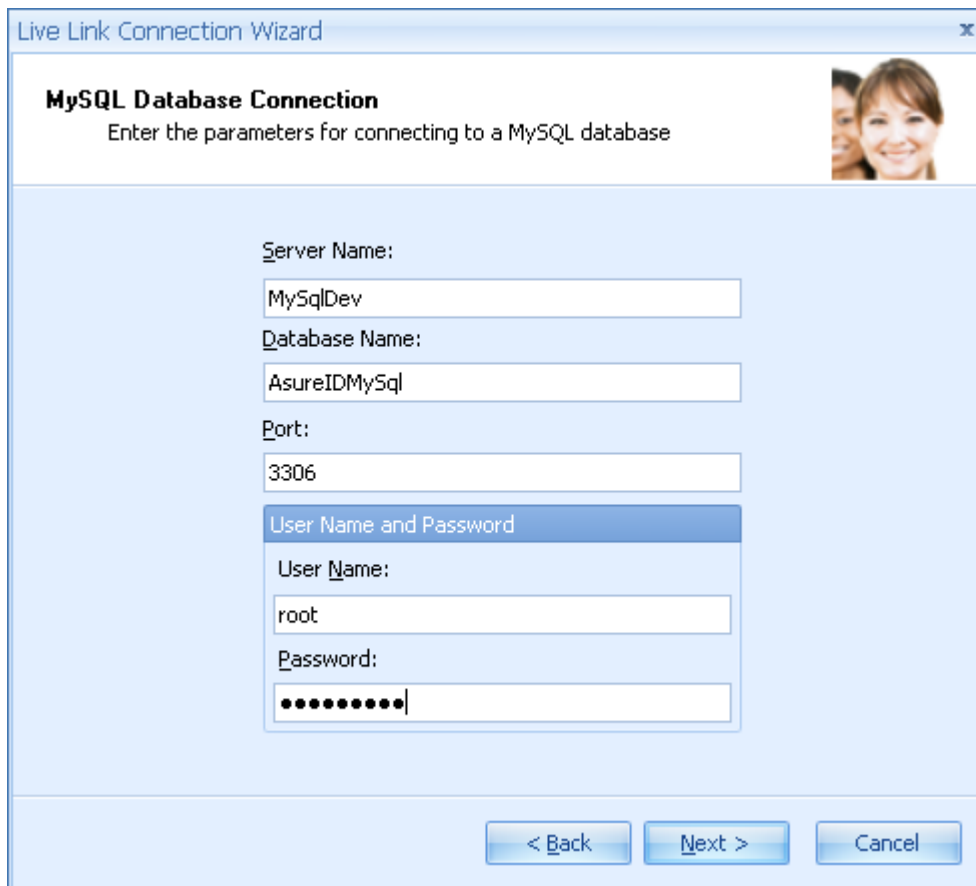
< Back   Next >   Cancel

Step	Procedure
7	<p>When using <b>Oracle 9i or 11g</b> Database Type, you will need the following:</p> <p><b>Server Name:</b> This is the server name or IP address where the Oracle instance resides.</p> <p><b>Port:</b> This is the open port for this database instance</p> <p><b>SID:</b> This will be provided by Oracle Admin person at client site. (SID is a unique name for an Oracle database instance)</p> <p><b>User Name:</b> This is the database username defined by the Oracle data administrator at the site.</p> <p><b>Password:</b> This is the password associated with the username.</p>



The screenshot shows a Windows-style dialog box titled "Live Link Connection Wizard". Inside, there's a section titled "Oracle Database Connection" with the instruction "Enter the parameters for connecting to an Oracle Database". The form contains several input fields: "Server Name" with the value "test5.aaitg.com", "Port" with "1522", and "SID" with "ASURE". Below these is a collapsed section titled "User Name and Password", which is currently expanded to show "User Name" with the value "scott" and "Password" with a masked input (dots). At the bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

Step	Procedure
8	<p>When using <b>MySQL</b> Database Type you will need the following:</p> <p><b>Server Name:</b> This is the name or IP address of where the SQLServer database resides.</p> <p><b>Database Name:</b> This is the actual database the user needs to access.</p> <p><b>Port:</b> This is associated to the desired database.</p> <p><b>User Name:</b> This is the database username defined by the data administrator at the site.</p> <p><b>Password:</b> This is the password associated with the username.</p>



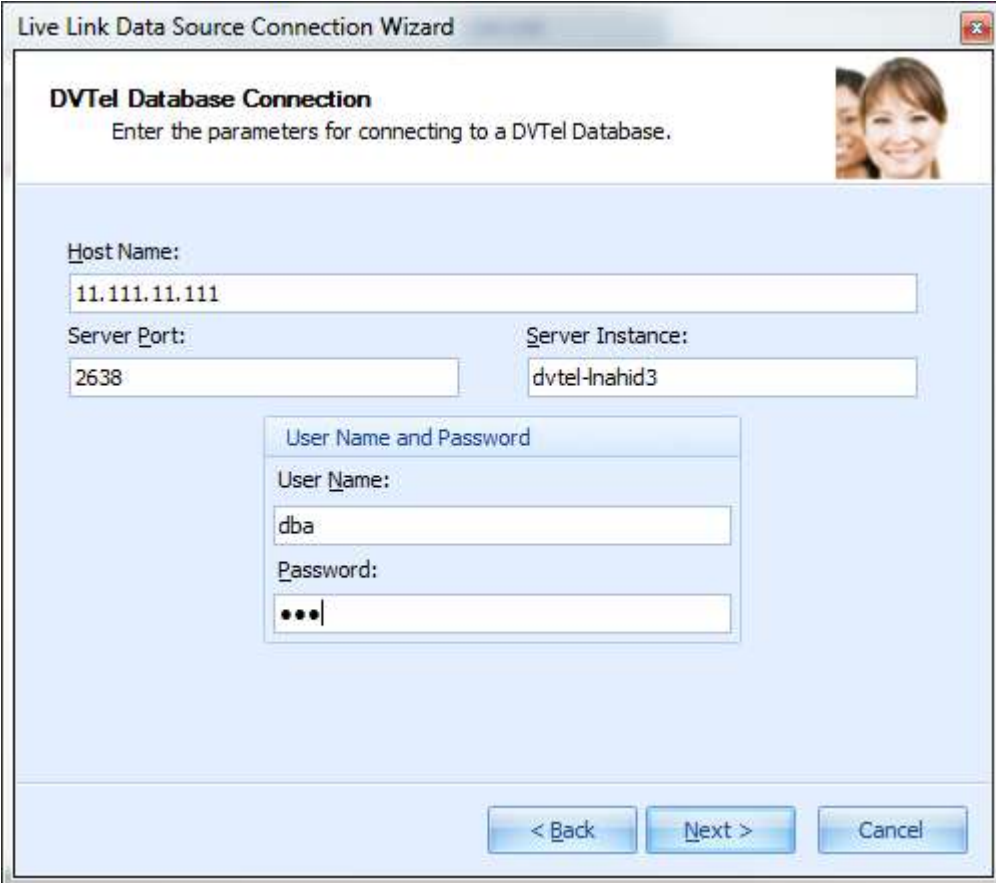
The screenshot shows a window titled "Live Link Connection Wizard" with a close button (X) in the top right corner. The main heading is "MySQL Database Connection" with a sub-instruction: "Enter the parameters for connecting to a MySQL database". To the right of the text is a small image of a smiling woman. Below the heading, there are several input fields:

- Server Name:** A text box containing "MySqlDev".
- Database Name:** A text box containing "AsureIDMySql".
- Port:** A text box containing "3306".
- User Name and Password:** A section header with a blue background. Below it are two text boxes:
  - User Name:** A text box containing "root".
  - Password:** A text box containing ten black dots, indicating a masked password.

At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel".



Step	Procedure
9	<p>When using <b>DVTel</b> Database Type.</p> <p>DVTel is an AsureID partner who uses our application to enhance/support your application. This solution has limited functionality and is a more scaled down Live Link connection. DVTel Live Link will be setup by DVTel personnel. Questions related to this connectivity should go through DVTel support.</p>



The screenshot shows a Windows-style dialog box titled "Live Link Data Source Connection Wizard". Inside, the "DVTel Database Connection" section is active, with the instruction "Enter the parameters for connecting to a DVTel Database." and a small photo of a smiling woman. The form contains the following fields:

- Host Name:** A text box containing "11.111.11.111".
- Server Port:** A text box containing "2638".
- Server Instance:** A text box containing "dvtel-hnahid3".
- User Name and Password:** A sub-section containing:
  - User Name:** A text box containing "dba".
  - Password:** A text box with three dots, indicating a masked password.

At the bottom of the wizard are three buttons: "< Back", "Next >", and "Cancel".

Step	Procedure
10	<p>The DVTel has these requirements:</p> <p>Asure ID 7 users must have a template group number set.</p> <p>When users are mapping a template that already has a name (ie: imported template) and both the template name and AsureID users template group number match an existing data source from DVTel, it will automatically be assigned and users will not be required to pick the primary data source.</p> <p>Employee ID is a mandatory field on every template. It can be a non-printable field.</p> <p>Status is also a mandatory field on every template and can also be non-printable, if users intend on adding, suspending and/or deleting records.</p> <p>Need to have installed Sybase client. This would come from DVTel.</p> <p>All data fields on a DVTel template must be mapped to a DVTel data source.</p>
11	<p>When using <b>LDAP</b> Database Type, apply the following:</p> <p>Search root is the suffix or desired root you want.</p> <p>The LDAP Authentication Support module determines whether a simple password is sufficient or other challenges are required.</p> <p>Implementation of the module in Dynamic Server takes advantage of the fact that for explicit connections, a password is sent to the server by the client.</p> <p>This password can be used to satisfy the LDAP Authentication Support module in cases where a simple password is used.</p> <p>When the authentication mode involves responding to single or multiple challenges, the applications must be able to respond to the challenges.</p> <p>Users will need to get user/password as well as above information from your LDAP System Administrator.</p>
12	<p>SIF is purchased as a separate program to support the School Interoperability Framework.</p>
13	<p>Once the database has been connected, two more windows need to be addressed: these are optional setups.</p> <p>Identify the Default Table (optional). (<b>Note:</b> This table will automatically show whenever you map data from the dropdown box. Once set it will be saved.)</p> <p>Select the Primary Table (optional). (<b>Note:</b> This table will be the driver for data retrieved regardless of how many other data sources and tables are added.)</p> <p>When adding multiple data sources, the primary table will be overridden with each choice.</p> <p>Selecting <b>&lt;None&gt;</b> means that the native database will be primary.</p>

	Click on <b>Next</b> .
14	Click the <b>Test</b> button to verify the connection is successful. Click <b>Finish</b> .
15	<p><b>Dynamic Lists are available only through Live Link.</b></p> <p>Dynamic lists are a list of values that comes from a second table.</p> <p>Setup will require establishing the relationship in two places. Dynamic lists do not work using the same table for the data source and the list source.</p> <p>Determine which field on the card will be a list field and choose the List datatype for that field.</p> <p>Click on <b>Advanced Data Field Options</b> to perform the mapping.</p>

**Data Field Properties**

**Data Field**

Field Name:

[Advanced Data Field Options](#)

**Field Options**

☐ This is a Unique Field

☐ This is a Read-only Field

☐ This is a Mandatory Field

**Field Type:**

☒ Text

☐ List

☐ Date

☐ Yes/No

☐ Numeric

**Font**

Font Name:

Font Color:

Font Height:

Font Style: ☐ B ☐ I ☐ U ☐ S

**Alignment**

Horizontal:

Vertical:

Rotation:  (In degrees CCW)

**Options**

☐ Word Wrap

☐ Reduce To Fit

**Placement**

Left:  Width:

Top:  Height:

**Printing**

☐ Non-Printable Entry

☐ Conditional [Edit Condition](#)

☐ Print on Fluorescing Panel

**Border and Fill**

Border Color:

Border Width:

Fill Color:

Step	Procedure
16	Under Data Source, identify the field in your cardholder table that will get updated. <b>(Note:</b> The datatype of this field MUST match the key from the Dynamic List Data Source, which is not the text value you can see.)

Advanced Data Field Options

**Text Options**

Default Value:

Max Characters:

Min Characters:

Format:

**Data Source**

Source:

Table:

Field:

**Picklist**

☒ Use a picklist to select the value

☐ Allow null picklist value

☐ Allow typing value in Data Entry

[Manage the Picklist](#)

**Data Formatting**

☐ Prefix

☐ Suffix

☐ Force Case

☐ Fill Unused Leading Space With

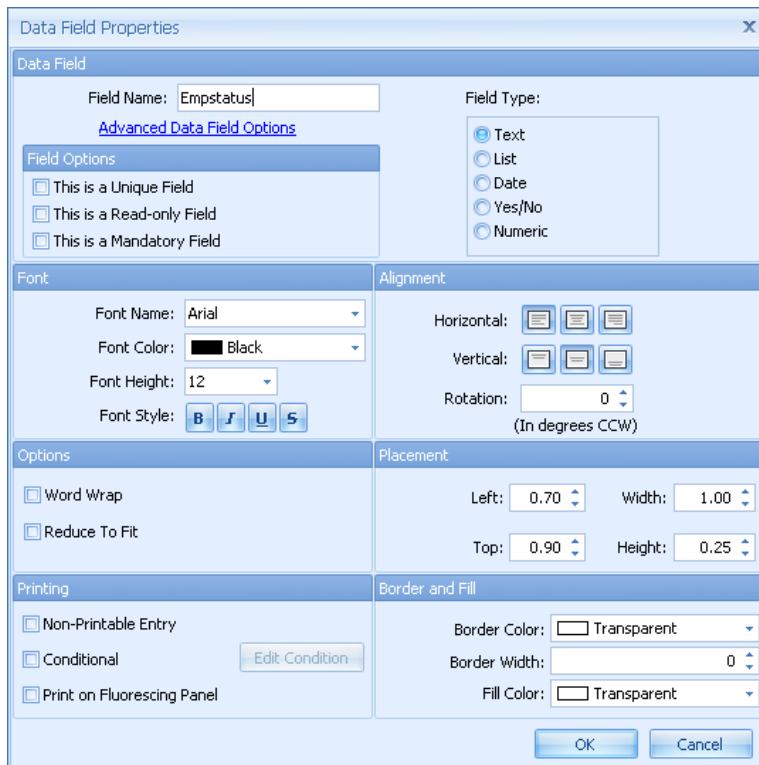
**Data Entry Options**

☐ Mask Password Characters

OK Cancel

Step	Procedure
17	<p>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.</p> <p>If the case is forced it will not affect the data in the database, it will only be rendered to the card and the preview mode in the forced case.</p>

Step	Procedure
18	<p>Pick Lists can be used with or without Live Link. Here is a description of this process.</p> <p>It is the ability to customize a list of values that a you can see for this field when in data entry. The value created is the value that will be stored in the data.</p> <p>This is only available with data fields that have a data type = text.</p> <p>In this example, the user creates a field called status and the field type is set to text.</p> <p>In Advanced Data Field Options select the ALLOW TYPING VALUE IN DATA ENTRY to manually type the text rather than choose from the Picklist. This is set for that record only and is not added to the picklist to be available by any other record.</p>



**Data Field Properties**

**Data Field**

Field Name:  [Advanced Data Field Options](#)

**Field Options**

☐ This is a Unique Field  
☐ This is a Read-only Field  
☐ This is a Mandatory Field

**Field Type:**

☒ Text  
☐ List  
☐ Date  
☐ Yes/No  
☐ Numeric

**Font**

Font Name:   
Font Color:   
Font Height:   
Font Style: **B** *I* U **S**

**Alignment**

Horizontal:     
Vertical:     
Rotation:  (In degrees CCW)

**Options**

☐ Word Wrap  
☐ Reduce To Fit

**Placement**

Left:  Width:   
Top:  Height:

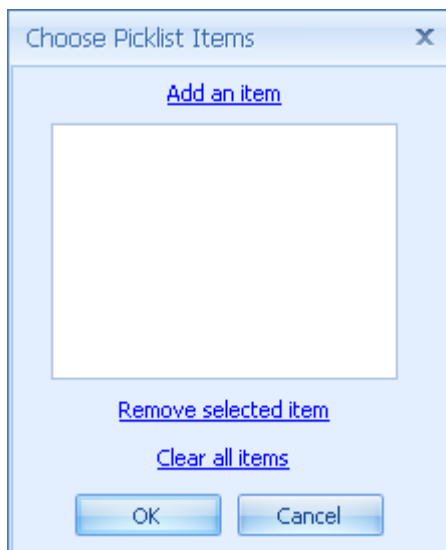
**Printing**

☐ Non-Printable Entry  
☐ Conditional [Edit Condition...](#)  
☐ Print on Fluorescing Panel

**Border and Fill**

Border Color:   
Border Width:   
Fill Color:

Step	Procedure
19	Click on [Manage the Picklist].



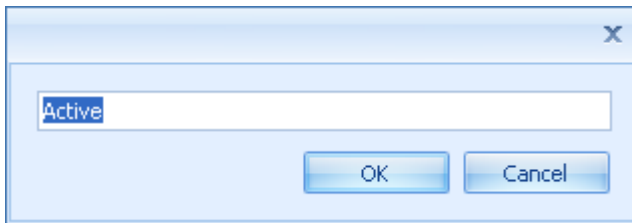
**Choose Picklist Items**

[Add an item](#)

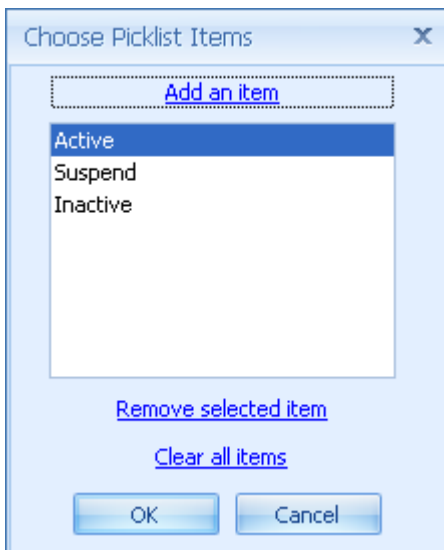
[Remove selected item](#)

[Clear all items](#)

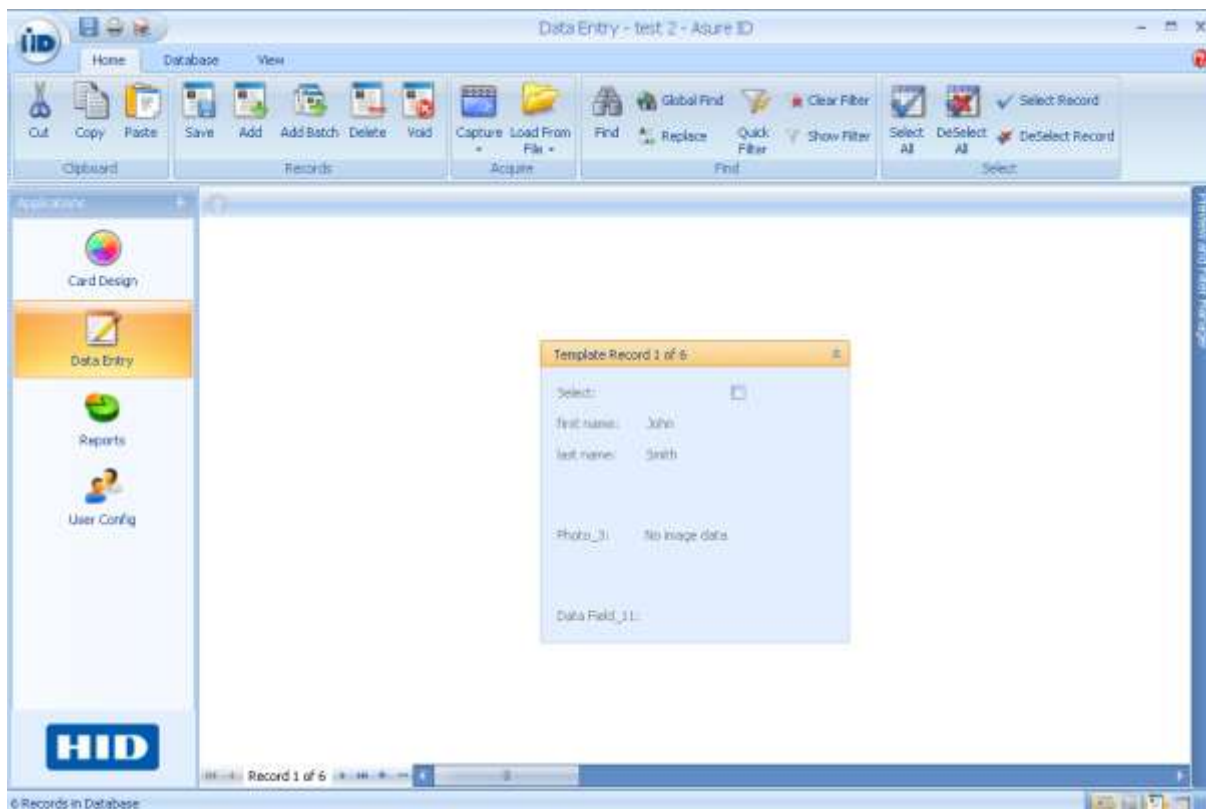
Step	Procedure
20	Click on [Add an item].



Step	Procedure
21	Click <b>OK</b> and continue to build the list.

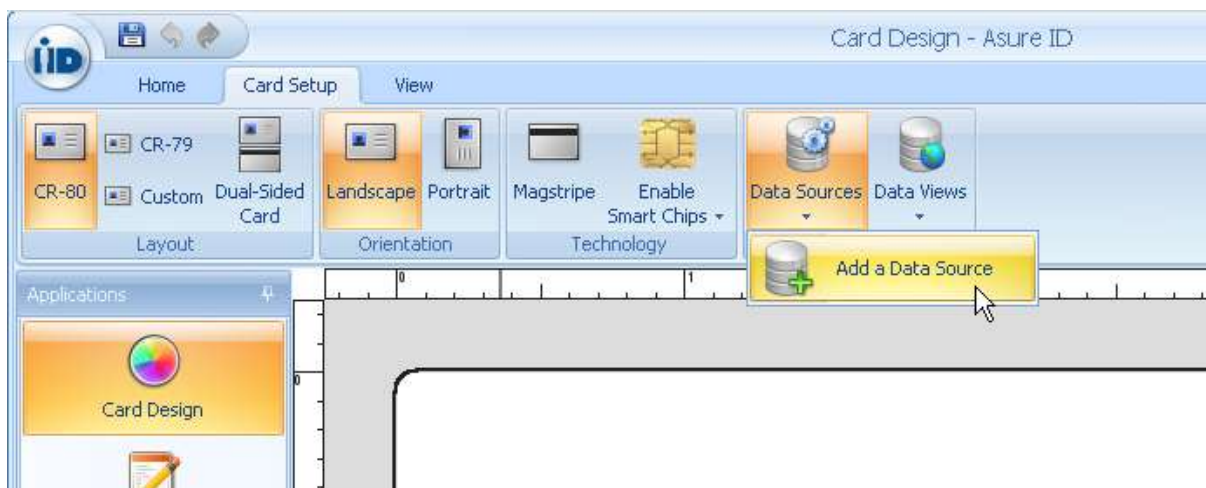


Step	Procedure
22	Click <b>OK</b> and when in Data Entry these are the list of values you can see. Since there was no default set, the field defaults to <NULL> or blank. (Note that other values can be typed in the pick list field, but will not be stored in the actual list that is managed from Card Design.



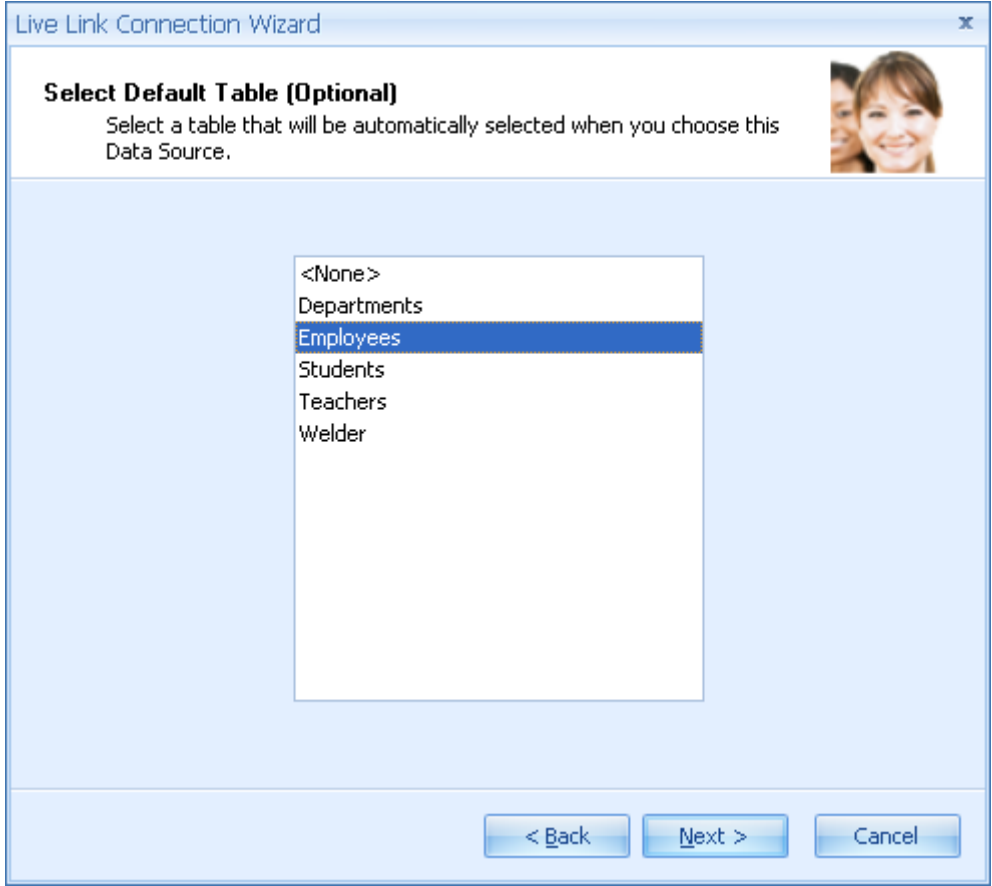
## 4.7.2 Data Sources

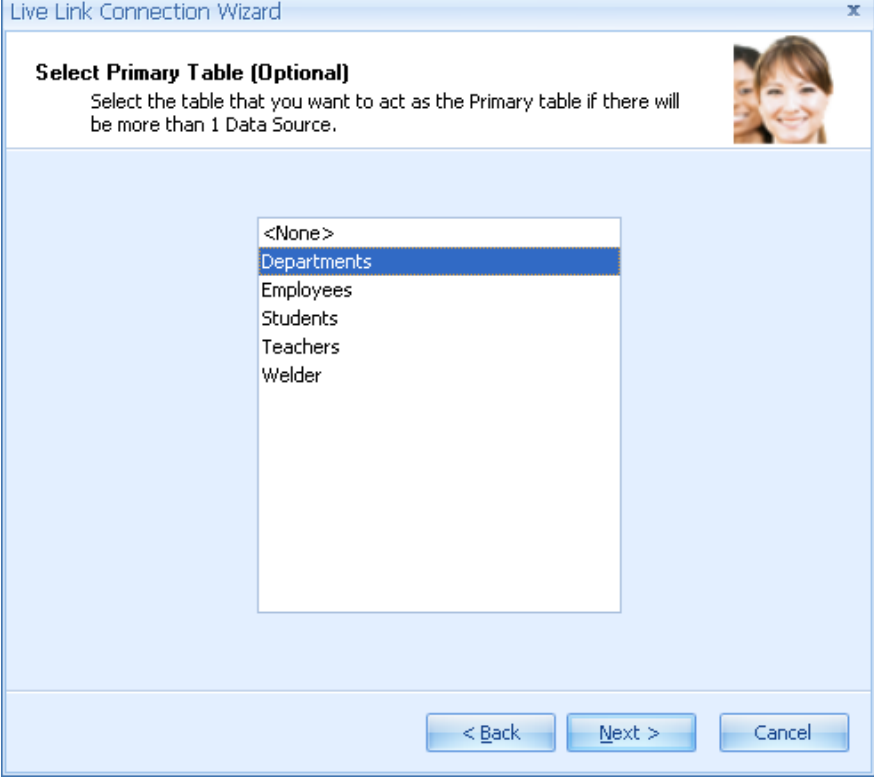
For details, refer to [Using the Multi Live Link Options \(Advanced User Level\)](#)





### 4.7.3 Creating Live Link Connections

Step	Procedure
1	<p>You can use the wizard to create Live Link connections for a template.</p> <p>See Using the Live Link Capability above.</p> <p>Enter database connectivity parameters.</p> <p>Enter a user and password with appropriate privileges.</p>
2	<p>Once connected to the chosen data source, choose a Default Table. (<b>Note:</b> This will appear in dropdowns when they map to their respective Data Fields.)</p> 
3	<p>Choose the Primary table. (<b>Note:</b> Once chosen, this table will be the source of all records and can be thought of as the <b>parent table</b>. The key field to this table will need to exist in any other Live Link tables used in the template.)</p>

	
4	<p>When you add multiple Live Link sources, the Primary Source must be the <b>last</b> addition. If this does not occur, return to the wizard and change the primary source.</p> <p>The values in the keys <b>must</b> match for every data source used on the template. (<b>Note:</b> The field names do not need to match.)</p> <p>Fields left unmapped will automatically get created in the Native database, using the key field from the Primary table. (<b>Note:</b> This happens when the template gets saved.)</p>
5	<p>Review these Primary Rules and <u>how</u> they apply:</p> <p>The table defaults to Primary <b>IF</b> you add one Live Link table to the template and do not choose a Primary table, when the template is saved.</p> <p>a warning will state that a Primary data source is needed <b>IF</b> you add multiple Live Link tables to the template and do not choose a Primary table (when saving the template). Correct this before proceeding with procedure.</p> <p>(<b>Note:</b> The template will be saved; however, Data Entry will not function until a Primary table is chosen.)</p>
6	<p>Review <u>how</u> keys are defined in the native database template table.</p>

7	<p>You can add multiple Live Link data sources and put fields on the template that are not linked to Live Link. These fields get stored in the Native database in a table with the same name as the template name.</p> <p>The key to this table is defined in one of three ways:</p> <p>The Record ID becomes the key with these conditions: No other auto incremented fields are defined on the template, using Data Entry as the data source.</p> <p>No Live Link-mapped fields exist on the template.</p> <p>The auto incremented field will be the Primary key with these conditions: An auto incremented field is defined, using Data Entry as the data source.</p> <p>No Live Link-mapped fields exist on the template. The template key will be defined as the key on the last Live Link table/field added to the template <b>IF</b> a Live Link table/field is on the template.</p>
---	---

#### 4.7.4 Using the Multi Live Link Options (Advanced User Level)

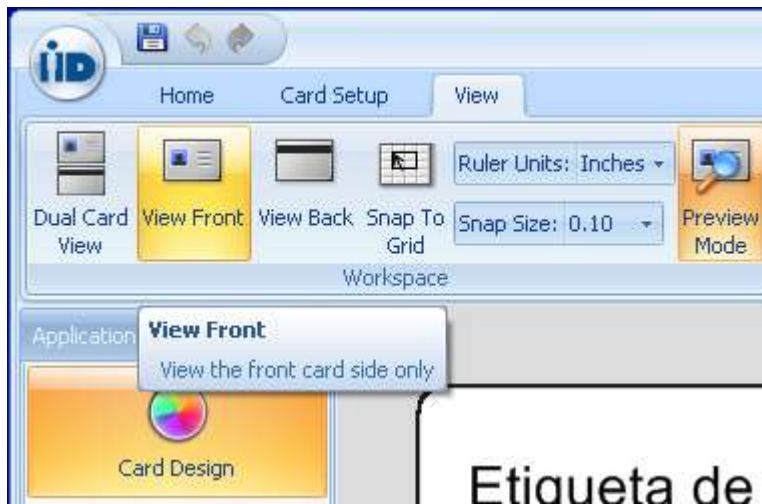
This allows you to link to multiple databases in Live Link.

Step	Procedure
1	<p>You can add and edit records for these specific scenarios: a single data source exists on the template. (<b>Note:</b> This can be native database or Live Link.) One Live Link table has been identified as Primary and the Native database.</p> <p>Multiple Live Link Tables and/or data sources on the same template will be for <u>edit only</u>. (<b>Note:</b> No adds or deletes will be allowed into the database in these Live Link tables.)</p> <p>You should include any number of fields that will be appended or added to the existing data using the native database. (<b>Note:</b> These fields can be added, updated or deleted.)</p> <p>DVTel solution allows adds (new records), edits and deletes. (<b>Note:</b> You can delete a record without removing the data, but this changes the status of the card holder. No other data source can be used with DVTel, including the Native database.)</p> <p>LDAP will be read only; also, it can be used with the Native database.</p>

## 4.8 Using the View Tab in Card Design

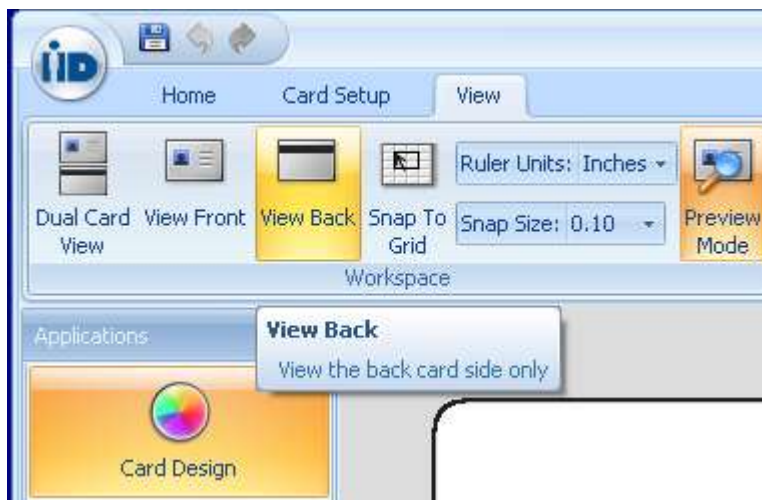
### 4.8.1 Viewing Front

Select **View Front** under View. (**Note:** This allows you to view only the front of the card.)



### 4.8.2 Viewing Back

Select **View Back** under View. (**Note:** This allows you to view only the back of the card.)



### 4.8.3 Snap To Grid

Toggle the **Snap To Grid** when the objects are moved or resized with this option. (**Note:** This allows you to snap to the grid.)



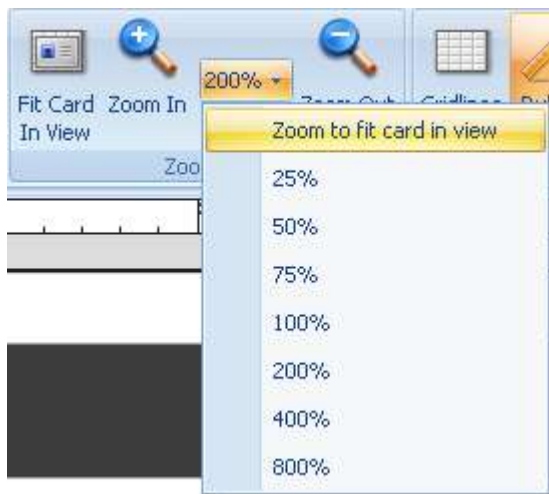
### 4.8.4 Using Rulers To Fit the Card into View

Zoom in on the card as much as possible to fit the current view. (**Note:** This allows you to obtain a complete, accurate view of your card design).



## 4.8.5 Zooming in on the active Card Side

Zoom in on the active card side (as needed). You can enlarge the image from 25% to 800%. As a general rule, 100% and 200% zoom is ideal. (**Note:** This allows you to efficiently zoom in or out as needed for viewing and editing purposes.)



## 4.8.6 Zooming Out on the Active Card Side

Zoom out on the active card side (as needed). (**Note:** This allows you to view your entire card layout and design for further editing purposes.)

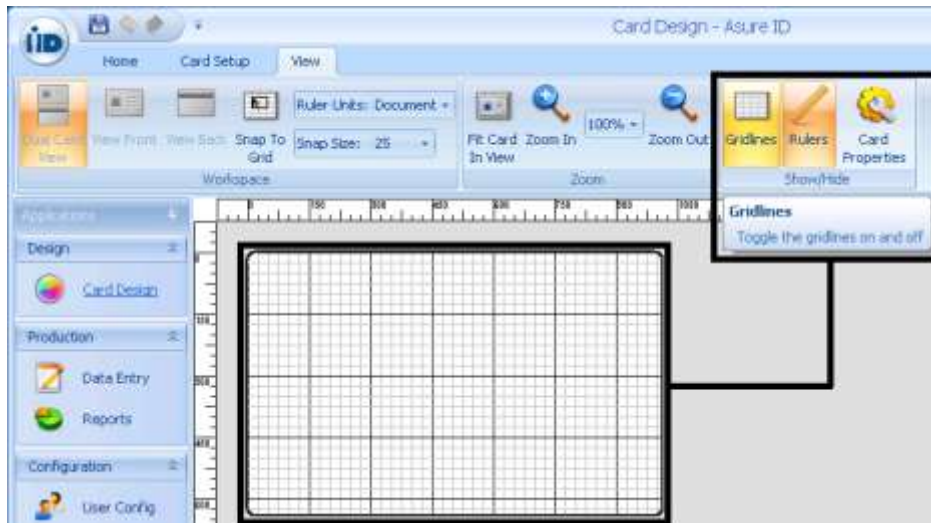


## 4.8.7 Selecting Show / Hide

Toggle to turn on or off the options for Gridlines, Rulers or Card Properties.

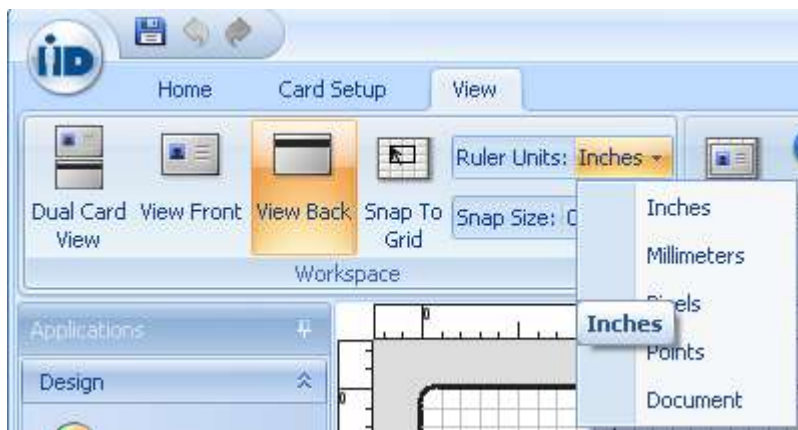
## 4.8.8 Selecting Gridlines

Toggle the gridlines on and off with this capability. (**Note:** This allows you to choose whether or not to display gridlines on the card surface)



## 4.8.9 Selecting Ruler Units

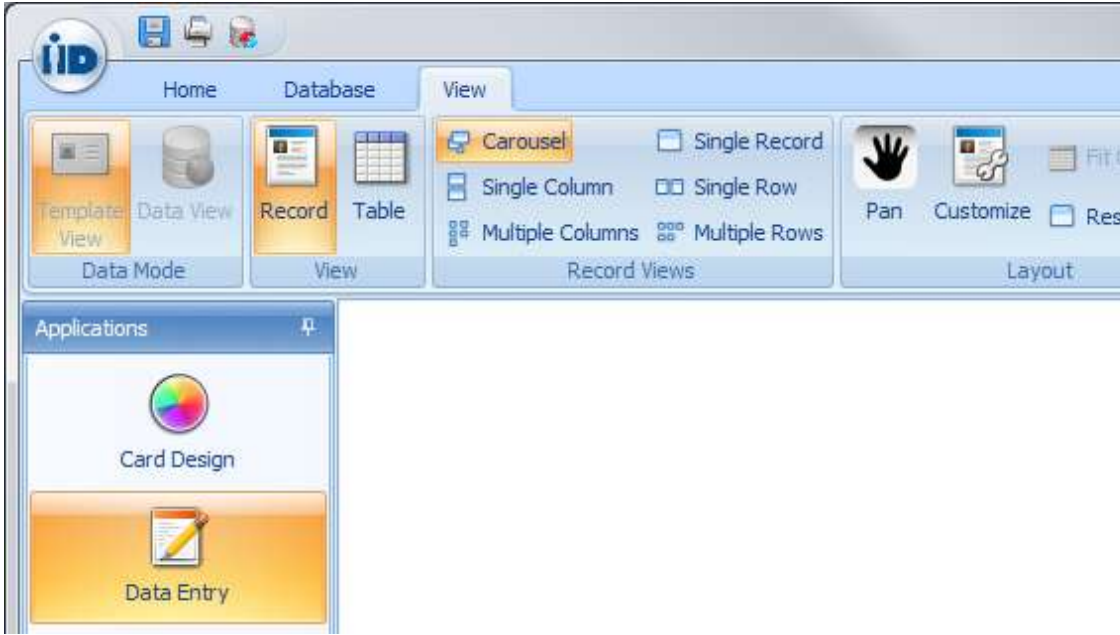

Select **Inches**, **Millimeters**, **Pixels**, **Points** or **Document** under **Ruler Units** with this option. (**Note:** This allows you to choose whether or not to display the horizontal and vertical ruler in the card design center. This is a full ON or OFF function.)





## 4.9 Using Record Views in Data Entry

Follow this procedure.

Step	Procedure
1	<p>Select <b>Data Entry</b>, and then select the <b>View</b> tab. See below.</p> 
2	<p>View the <b>Record Views</b> options and select as needed.</p> 



## Section 5: Data Entry Application

The Data Entry application allows you to populate the database created in the Card Design Center with the appropriate data for the card and then print the designated cards.

You can access the workspace for this application. (**Note:** It is divided into two sections, which are the record display area and the preview area. The record display area occupies the middle portion of the screen and the preview area occupies the right side of the display area.)

You have two views in the Data Entry application. (**Note:** The default view shows a single record in a form layout. Upon entering the application, the form will be populated with the first data record from the data set (if there is data in the data set).)

You can navigate through the data records by using the **Next**, **Last**, **Previous**, and **First** buttons. (Next to the Record X of X at the bottom)

### 5.1 Selecting the Home tab

You can use the items on the Home tab to perform these functions. Highlight the icon for the definition of each function.

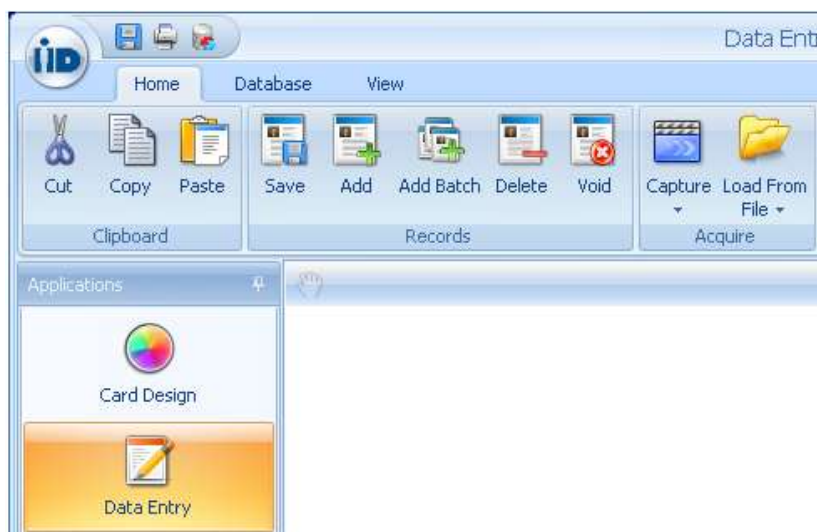
The Clipboard offers the Cut, Copy and Paste options.

The **Records** offers the **Save**, **Add**, **Add Batch** and **Delete** for managing the records in the database.

The Acquire offers the Capture and Load from File options.

The Find offers Find, Replace and Filter tools.

The **Select** offers options to **Select** and **Deselect All** records.



### 5.1.1 Selecting Clipboard – Cut, Copy, and Paste

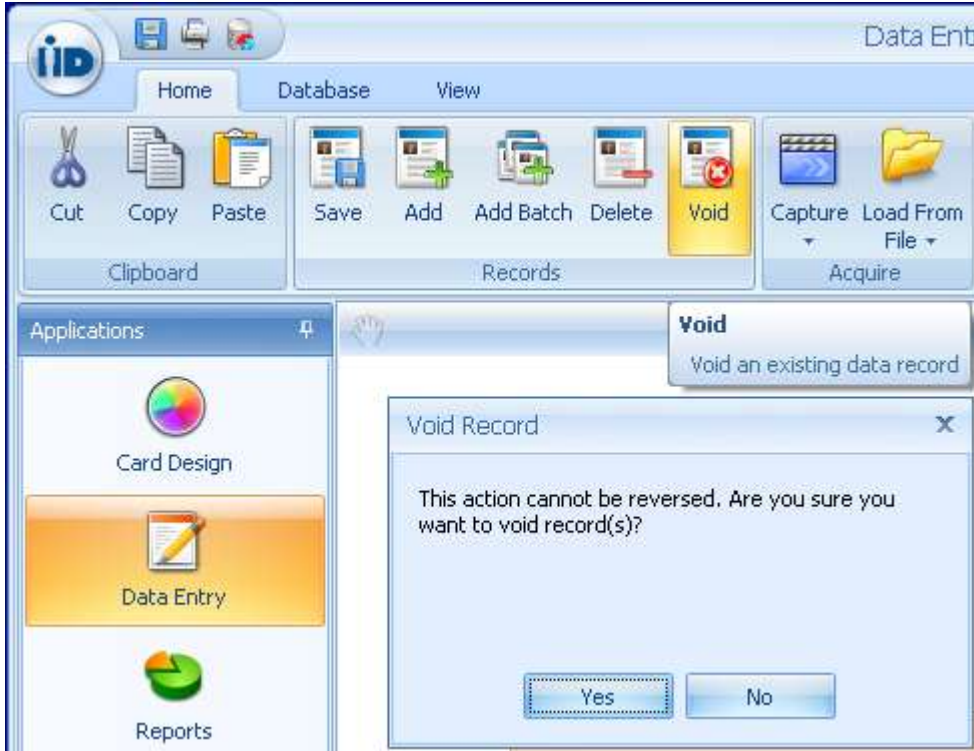
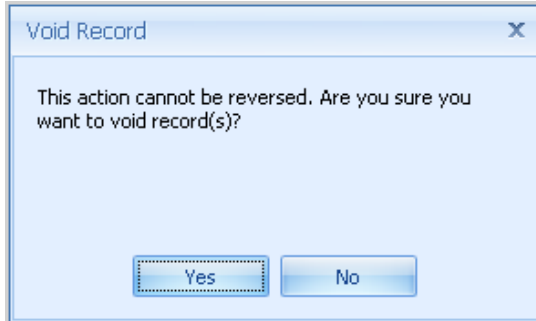



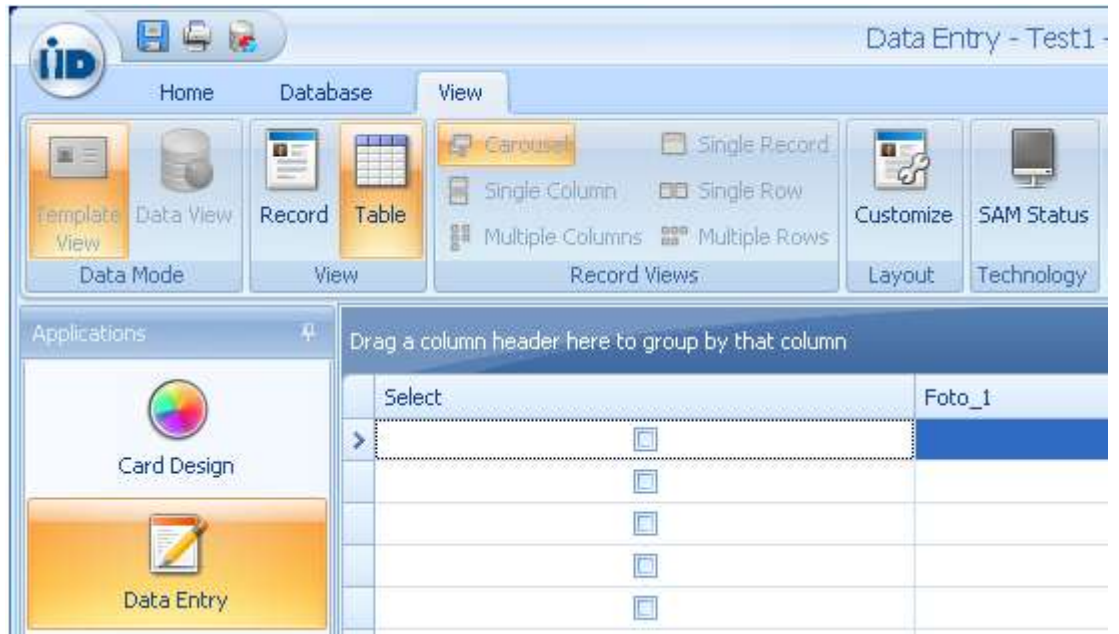
### 5.1.2 Selecting Records – Save, Add, Add Batch, Delete, and Void



### 5.1.2.1 Voiding a Record (Data Entry)

The Records group contains the VOID function. There is no function to “un-void” a record, so the void action is permanent. Select All and Select Record do not select voided records. Voided records cannot be printed.

Step	Procedure
1	<p>Select the record to be voided from Data Entry Application.</p>  <p>Confirm the Void Record verification window. There is no function to “un-void” a record.</p> 

	<p>If the record is needed again, it must be added again. If unique fields are used, the voided record should be deleted before it is added again.</p> <p>Select All and Select Record does not select voided records.</p>
2	<p>Voided records cannot be printed. After a record has been voided, it can no longer be edited. The data fields are disabled, and shown dimmed gray. The preview will also show “Void” across the card.</p> 
3	<p>By default, the Voided column is not displayed. Right-click on the column names to open the Column Chooser.</p> <p>All the internal database fields are listed, including Voided, and can be dragged from the Customization window and dropped onto the grid to be displayed.</p> <p>To remove the column from the display, open the Column Chooser and drag the column off the grid into the Customization window.</p> 

4

All the internal database fields are listed, including Voiced, and can be dragged from the Customization window and dropped onto the grid to be displayed.

To remove the column from the display, open the Column Chooser and drag the column off the grid into the Customization window.



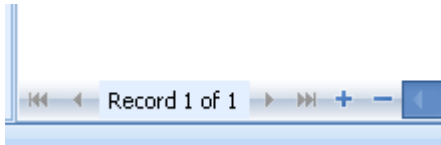
### 5.1.3 Selecting Acquire – Capture and Load From File



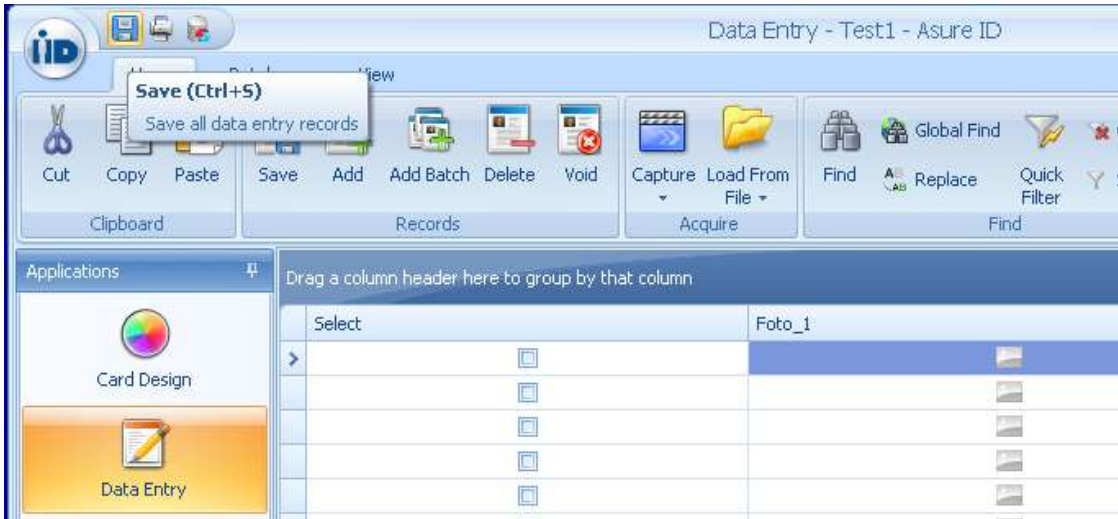


### 5.1.3.1 Load from File

The purpose of this case is to print a card using Photo Capture.

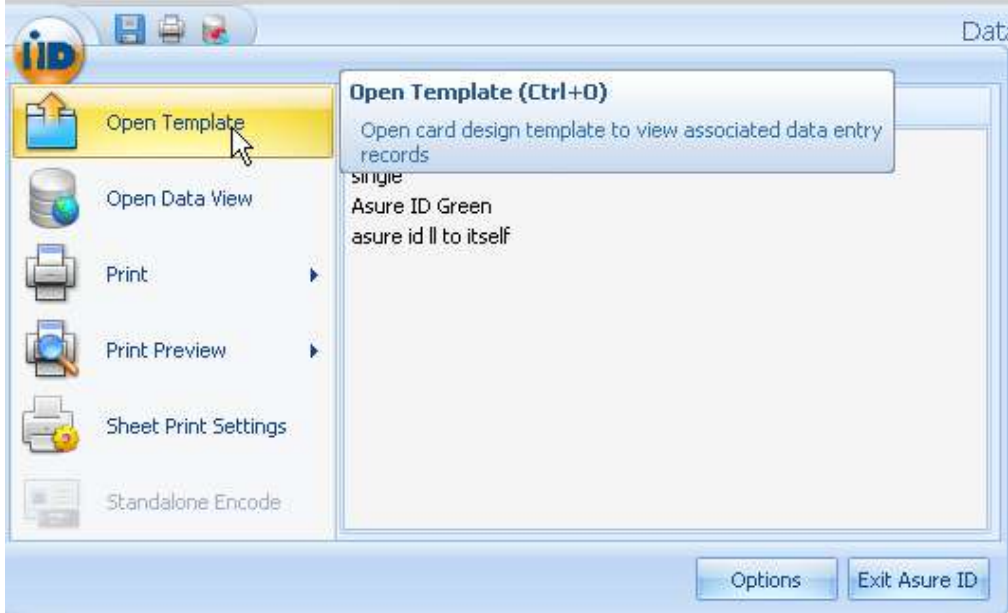
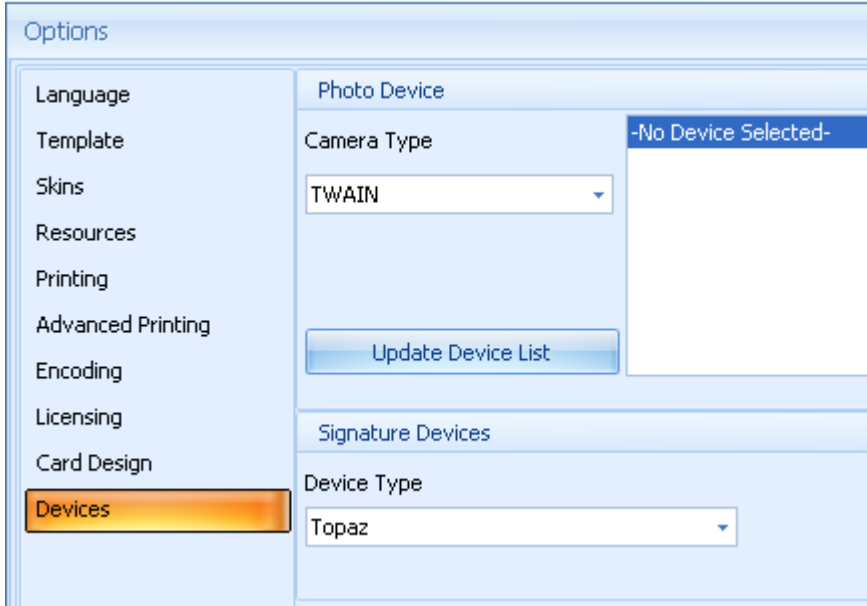
Step	Procedure
1	Launch the Asure ID 7 software.
2	Enter your User ID and Password in the appropriate areas.
3	Go to the Data Entry application.
4	From the Application menu, select Open Template from the dropdown menu.
5	<p>Add a record by going to the <b>Records</b> option on the lower bar using the + or – sign to either add or delete a record.</p> 
6	Click on Photo Field in the added record.
7	From <b>LOAD from FILE</b> icon the select the desired photo. Or right click into the <b>PHOTO</b> box and select from the dropdown.



8	Select the picture and modifies the location of picture box (if necessary) for the dimensions established in the card template. ( <b>Note:</b> This allows you to get the proper placement of the person's face in the field.)
9	Click <b>OK</b> and the photo is imported into the photo field.
10	Click the <b>Save</b> icon on the <b>Records</b> option. ( <b>Note:</b> a preview rendering of the card will display on the right hand preview pane.)  
11	Click on the <b>Print</b> icon next to the Application Menu or open the menu for the print options.

### 5.1.3.2 Photo File

Step	Procedure
1	From the <b>Application</b> icon, select <b>Open Template</b> . ( <b>Note:</b> From the Open Template dialog choose the template and click <b>OK</b> .)

	
2	<p>If capturing a photo from a digital camera (or similar) click on the <b>Application</b> icon. Click <b>Options</b> and then <b>Devices</b>.</p> <p>Select <b>Camera Type</b>, <b>TWAIN</b> or <b>WIA</b>. Click on the camera from the list of capture devices, when completed click <b>OK</b> to close the Options dialog.</p> 
3	<p>From the Records group, select <b>Add</b>. (<b>Note:</b> The enrollment dialog will appear.)</p>



4

Right-click in the **Photo** field to Capture Image, Load Image from File, Edit Image, Delete Image or Save Image to File.

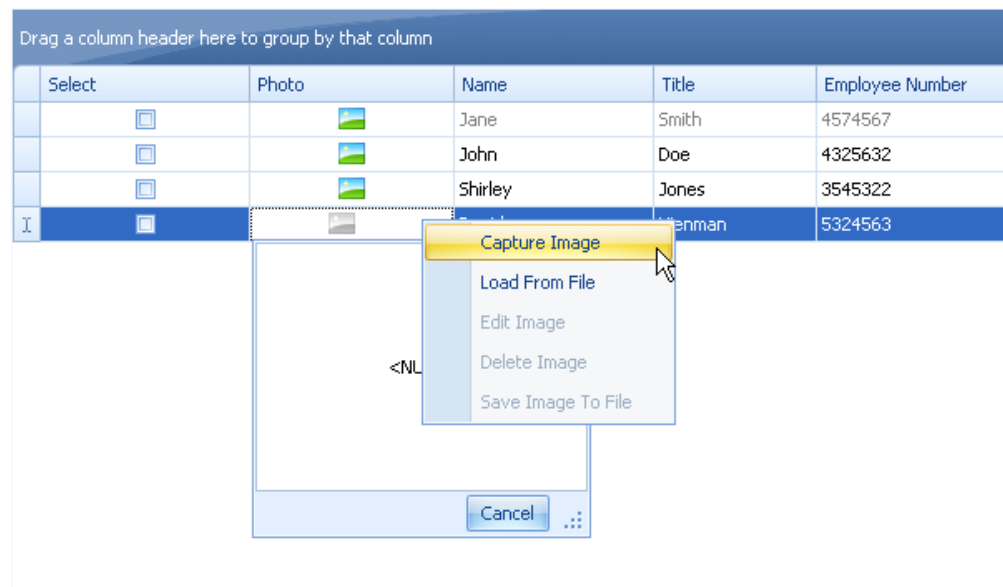
Select **Capture Image** if working with a digital camera. The **Select Source** dialog may appear.

Choose the camera and click **Select** to close the dialog.

Take the Photo.

Double click on the photo to display the **Edit Image** dialog.

Click and drag the Crop tool, redraw the rectangle around the image and click **OK** to close the Edit Image dialog.

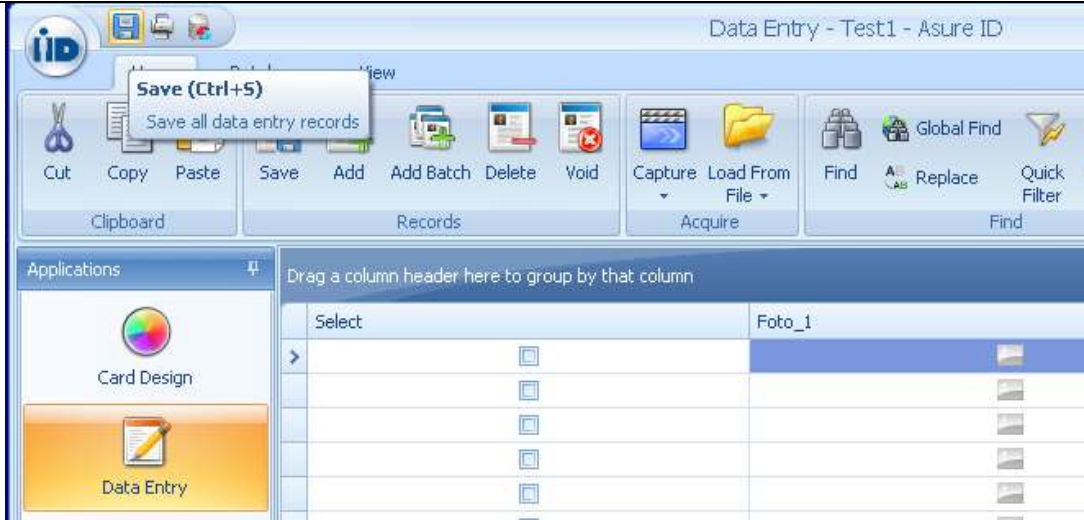
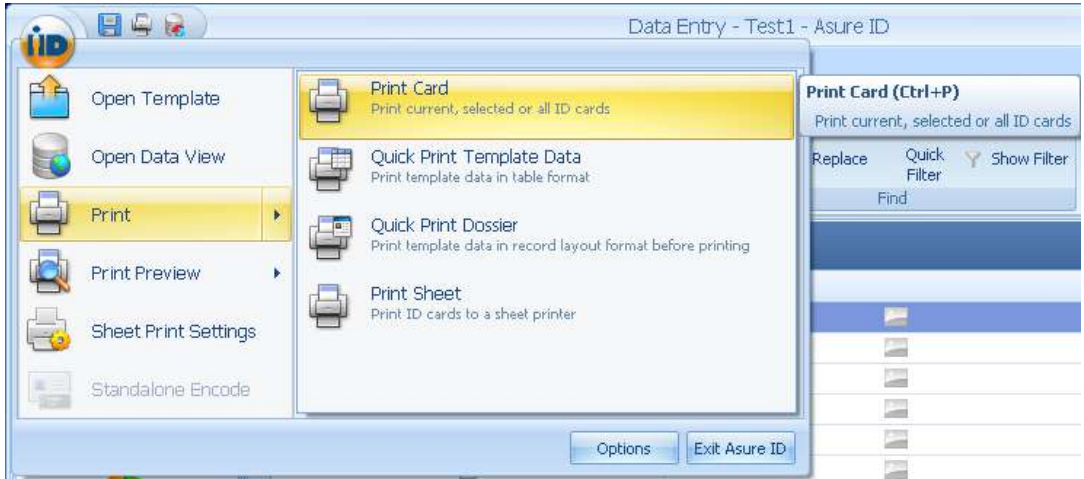


5

Enter Data for the rest of your data fields.


6

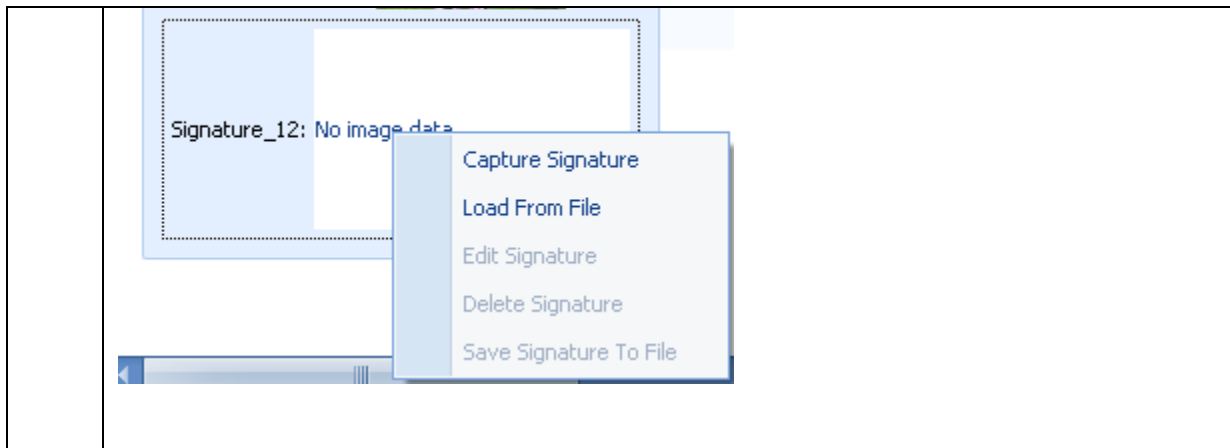
Click **Save** within the Records group. (**Note:** Once the **Save** button has been selected the fields with the Preview will all be filled in.)

	
7	Repeat Steps 4 to 6 as many times as wanted.
8	<p>Select <b>Print / Print Card</b> icon from the application menu to print a card.</p> <p>Select the printer from the <b>Name:</b> dropdown menu.</p> <p>Select <b>Properties</b> to change the card orientation or any other settings relevant to the card design.</p> <p>When completed, click <b>OK</b> to print a card and close the Print Card dialog.</p> 

### 5.1.3.3 Signature File

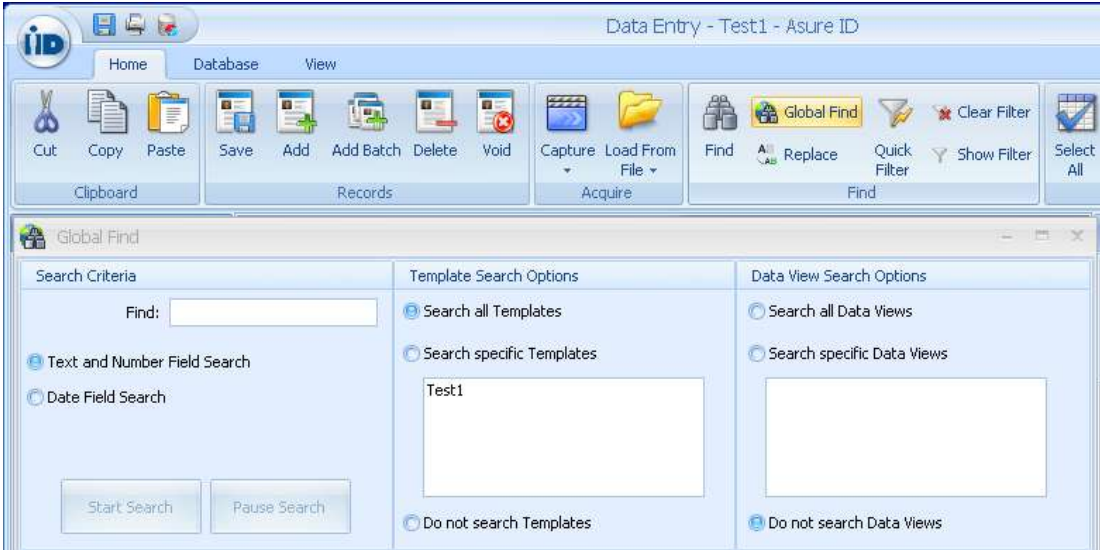
The purpose of this case is to print a card with a Signature.

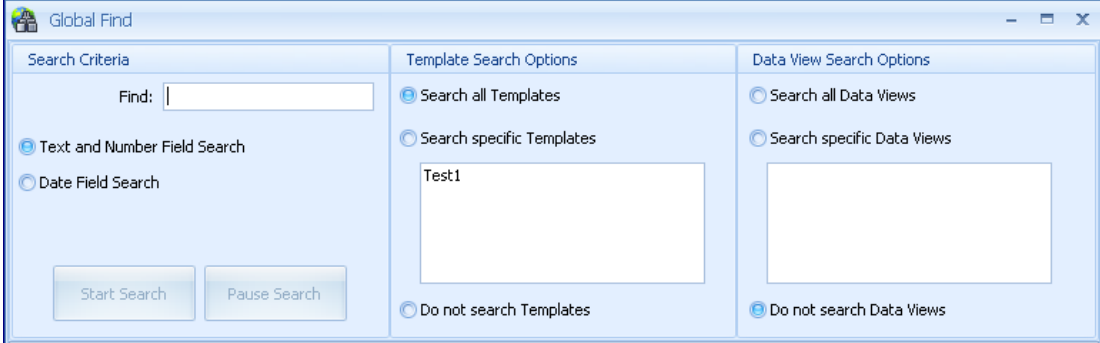
Step	Procedure
1	Launch the Asure ID 7 software.
2	Enter your User ID and Password in the appropriate areas.
3	Go to the Data Entry application.
4	From the Application menu, select Open Template from the dropdown menu.
5	Add a record by going to the <b>Records</b> option on the Home Tab.
6	From the <b>AQUIRE</b> option click on the <b>Capture</b> (select Signature) or <b>LOAD from FILE</b> icon the select the desired photo. Or right click into the <b>SIGNATURE</b> box and select from the dropdown. If you set up the FOLDER DATA SOURCE option refer to <a href="#">Adding a Signature</a>
7	Select the signature and modifies the location of picture box (if necessary) for the dimensions established in the card template. This allows you to get the proper placement of the signature in the field.
8	Click <b>OK</b> and signature is imported into the signature field.
9	Click the <b>Save</b> icon on the <b>Records</b> option. A preview rendering of the card will display on the right hand preview pane. 
10	Click on the <b>Print</b> icon next to the Application Menu or open the Application Menu for the print options
11	To edit the Signature field, right click on the signature to bring up the option box.

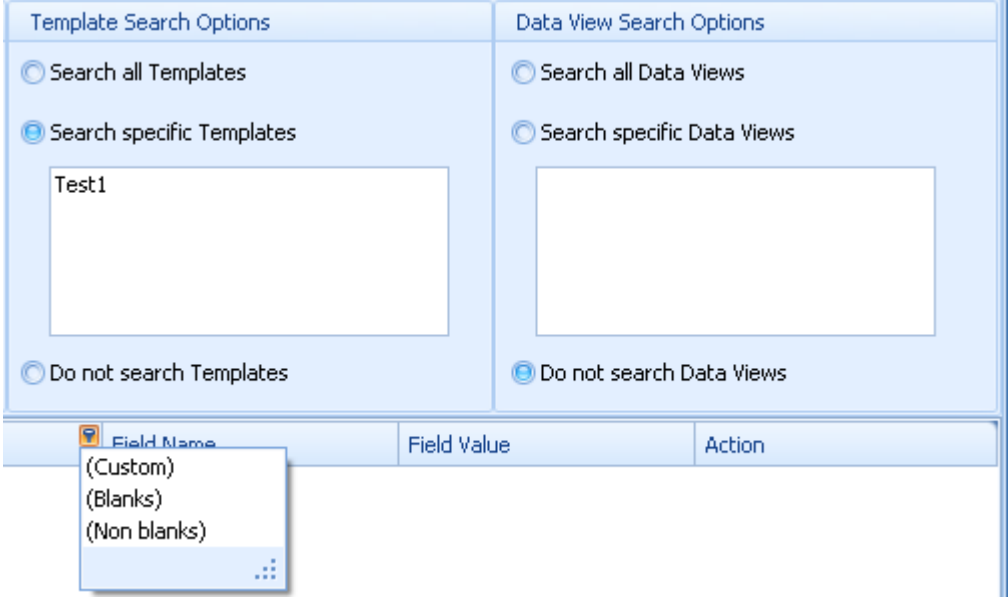



## 5.1.4 Selecting Find – Find, Global Find, Replace, Quick Filter, Clear Filter, and Show Filter

### 5.1.4.1 Global Find

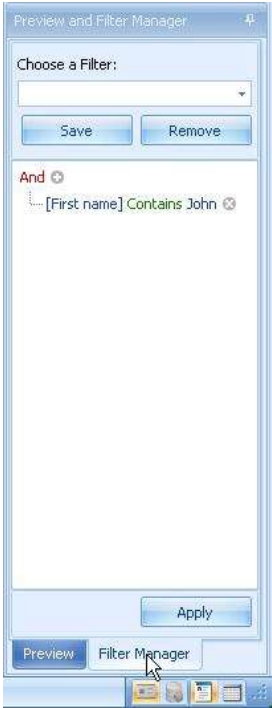
Step	Procedure
1	<p>In the Data Entry application, select the <b>Home</b> tab to view the <b>Global Find</b> icon in the Ribbon. See below for navigation to this specific function.</p>  <p>The screenshot shows the "Data Entry - Test1 - Asure ID" application window. The "Home" tab is selected in the ribbon, and the "Global Find" icon is visible. Below the ribbon, the "Global Find" dialog box is open, displaying search criteria and options. The dialog box has three main sections: "Search Criteria", "Template Search Options", and "Data View Search Options".</p> <p><b>Search Criteria:</b> A "Find:" text box is present. Below it, there are two radio buttons: "Text and Number Field Search" (selected) and "Date Field Search". At the bottom of this section are "Start Search" and "Pause Search" buttons.</p> <p><b>Template Search Options:</b> There are two radio buttons: "Search all Templates" (selected) and "Search specific Templates". Below "Search specific Templates" is a text box containing "Test1". At the bottom of this section is a radio button labeled "Do not search Templates".</p> <p><b>Data View Search Options:</b> There are two radio buttons: "Search all Data Views" (selected) and "Search specific Data Views". Below "Search specific Data Views" is a large empty text box. At the bottom of this section is a radio button labeled "Do not search Data Views".</p>

2	<p>In the <b>Global Find</b> search window, you have two choices:</p> <p>Perform a simple search on a single table.</p> <p>OR</p> <p>Search for a piece of information throughout selected templates or throughout all templates. (<b>Note:</b> You can also search through all of the Data Views, which are saved.)</p> <p>The proper options for each search are defined within the Global Find window.</p> <p>Click on the <b>Start Search</b> button to begin the process (once all search criteria is filled out).</p> <p>Use the <b>Pause Search</b> button to stop the search at the next break in the search. (<b>Note:</b> This window can be minimized to run the requested search in the background.)</p> <p>If searching for a specific date, the <b>Date Field Search</b> option will need to be used (due to the different ways that dates can be formatted).</p> 
3	<p>View the displayed results of the search. (<b>Note:</b> These results can be filtered in order to find the required information.)</p> <p>Click in the upper left corner (of each column header) in order to open the filter for that column.</p>

	
4	<p>Use these available tools to edit or clear filters in the <b>Global Find</b>.</p> 


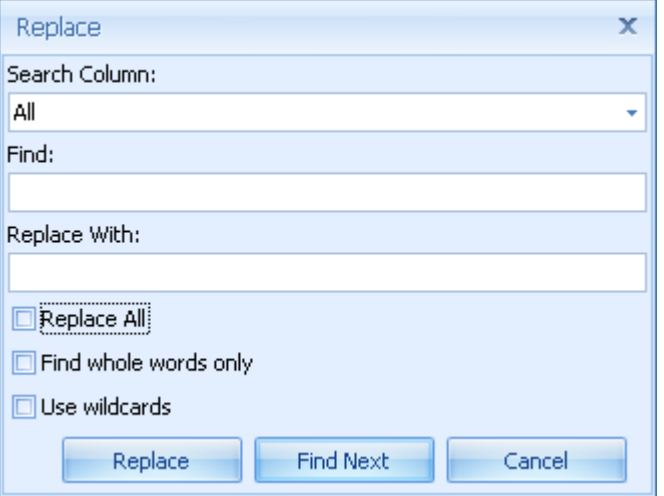
### 5.1.4.2 The Filter Manager

Step	Procedure
1	Use the <b>Filter Manager</b> , displayed in the lower right. See below. ( <b>Note:</b> To change the view to the Filter Manager, click on the appropriate tab at the

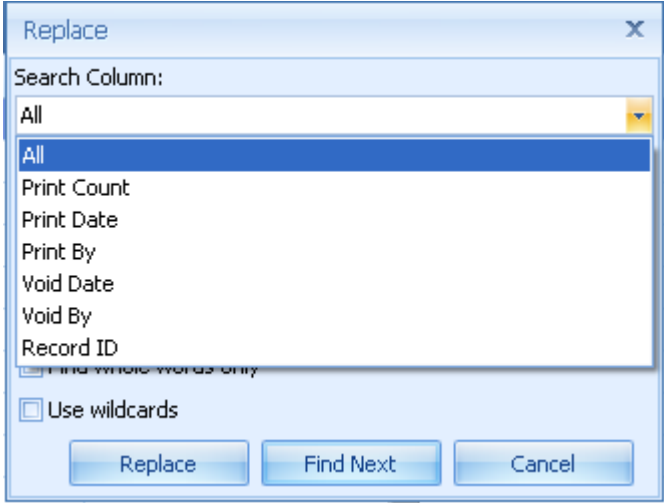
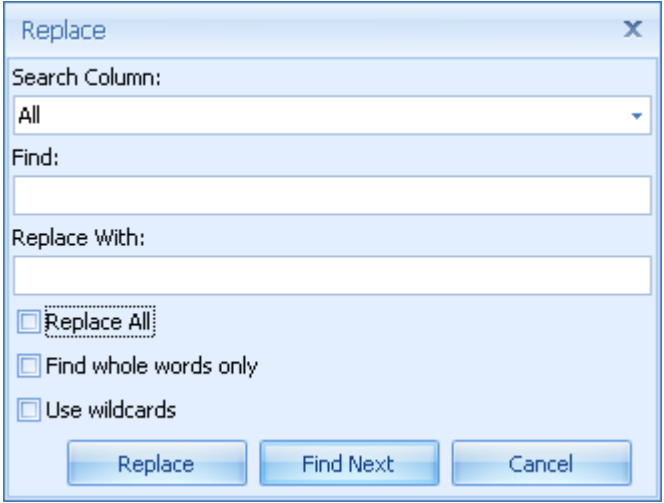
	<p>bottom.)</p> 
2	Modify the <b>Filter Settings</b> or cancel the <b>Filter</b> . ( <b>Note:</b> This includes the Quick Filter.)

### 5.1.4.3 Find and Replace



Step	Procedure
1	Select Data Entry, then select Home > FIND or REPLACE.

	
2	<p>Using the FIND function:</p> <p>Select the Search Column.</p> <p>Fill in the data to search for in FIND.</p> <p>Select the option for Whole Word or use a Wildcard.</p> <p>Use the FIND NEXT button to scroll through records.</p> 



	
3	<p>Using the REPLACE tab</p> <p>Select the Search Column.</p> <p>Fill in the data to FIND and REPLACE WITH.</p> <p>Select the option for Replace All, Find Whole Words, or use Wiildcard.</p> <p>Use the FIND NEXT button to scroll through records in order to change only specific records not all of them. Then click REPLACE, only that record is changed.</p> 

#### 5.1.4.4 Quick Filter

Step	Procedure
1	<p>Select Data Entry, then select Home &gt; Quick Filter.</p> 
2	<p>Access the <b>Quick Filter</b> window to view and search through the data fields in your designated template.</p> 
3	<p>Fill out the different fields (required for the search). Click <b>OK</b>.</p>

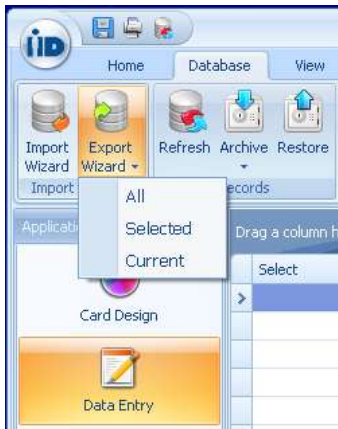
### 5.1.5 Selecting Select – Select All, DeSelect All, Select Record, and DeSelect Record



## 5.2 Selecting the Database tab

**Import/Export** allows you to import data from prior 5.x versions of Asure ID using the Wizard. (**Note:** This allows you to import data into the template from external sources and/or save data from the template into an external database format. This manages the records.)

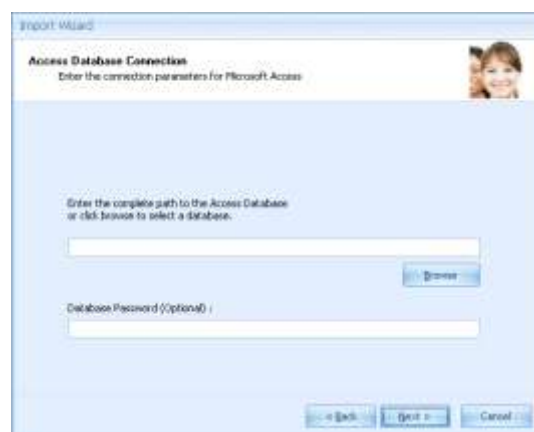
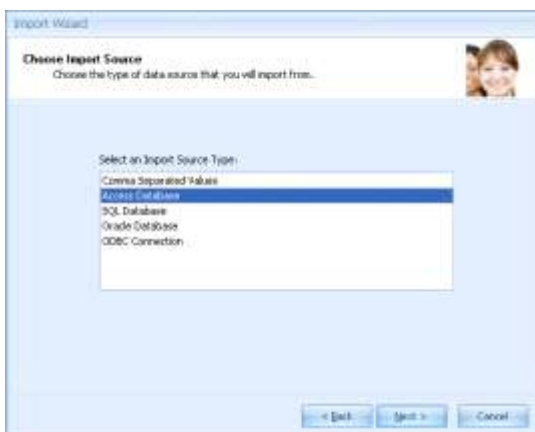
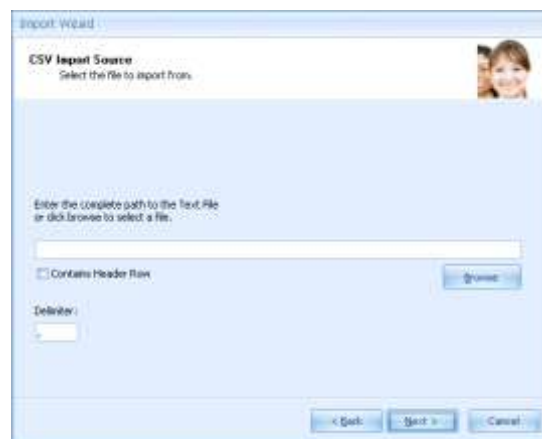
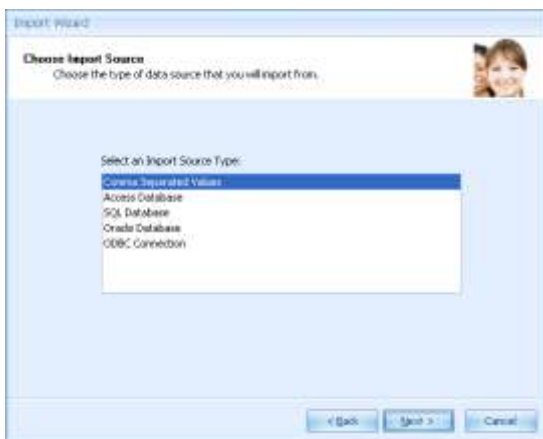
You can export templates and data by selecting the specified templates in the Export Wizard. Options for exporting include ALL, SELECTED OR CURRENT records.

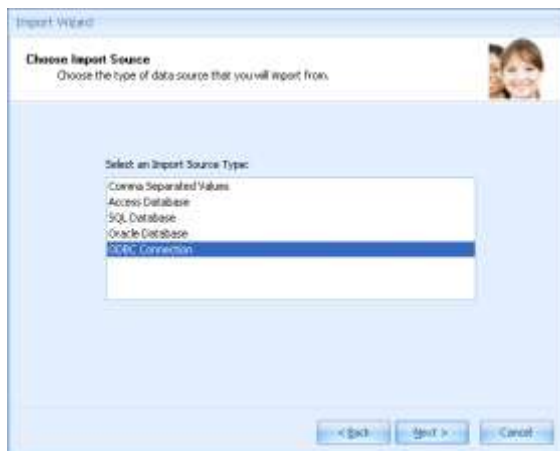
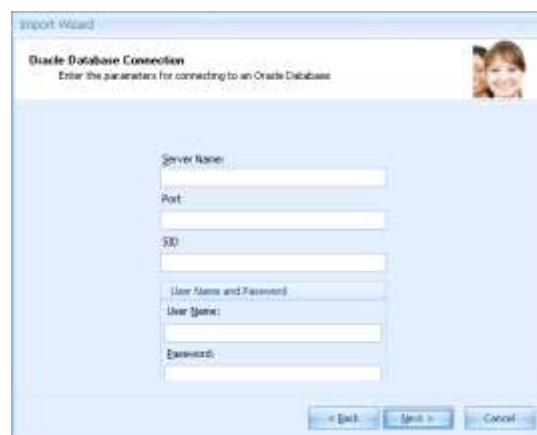
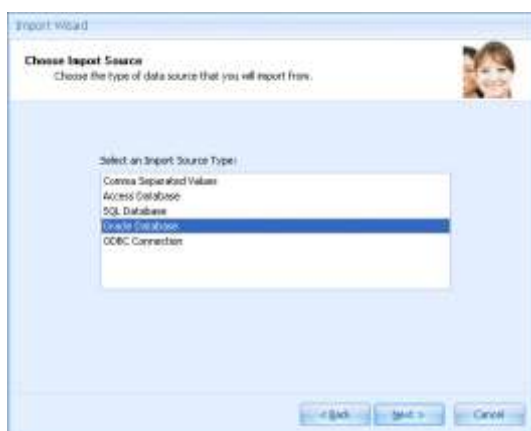
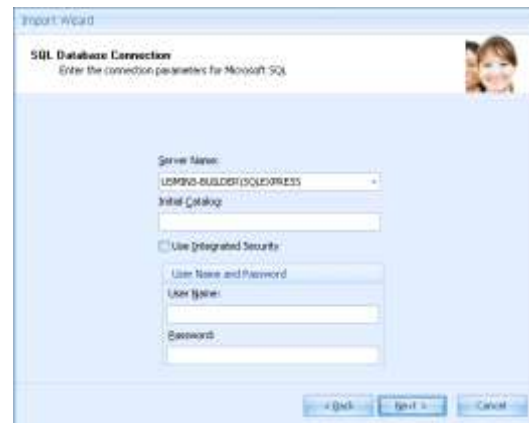
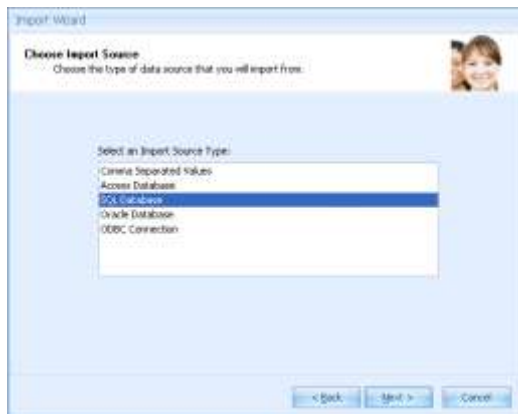


The **Records** offers the **Refresh**, **Archive** and **Restore** options for managing the records in the database.



## 5.2.1 Selecting Import Wizard





## 5.2.2 Selecting Export Wizard



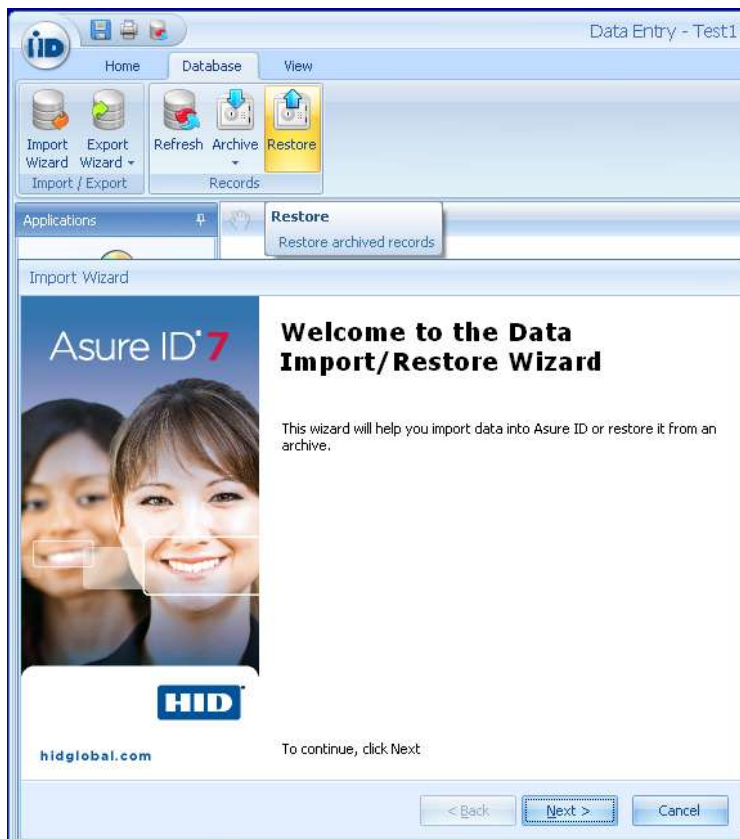
## 5.2.3 Selecting Refresh



## 5.2.4 Selecting Archive



## 5.2.5 Selecting Restore



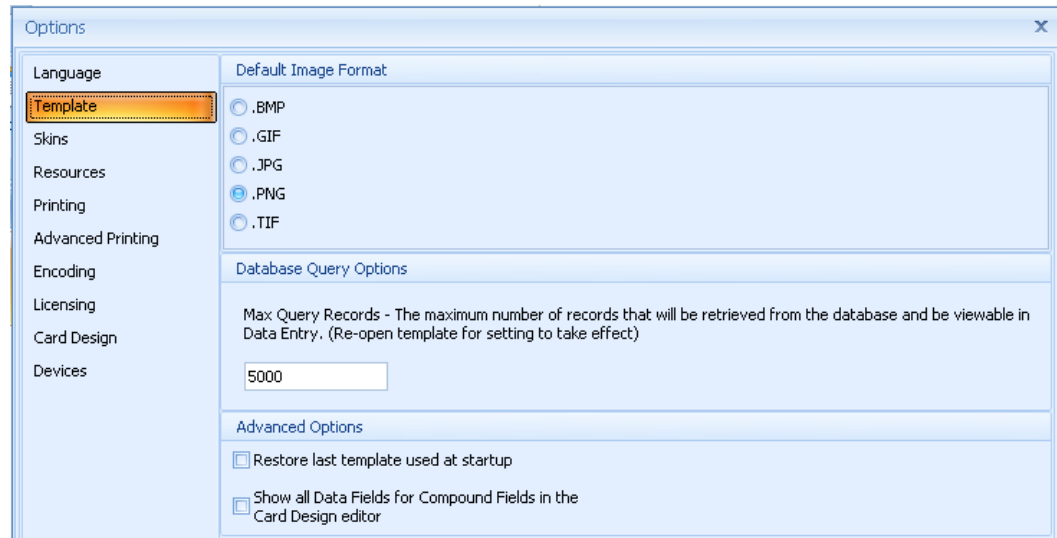
## 5.2.6 Setting up Asure ID (to only load X number of records)

Step	Procedure
1	<p>Open Asure ID 7 and access the <b>Options</b> menu.</p>



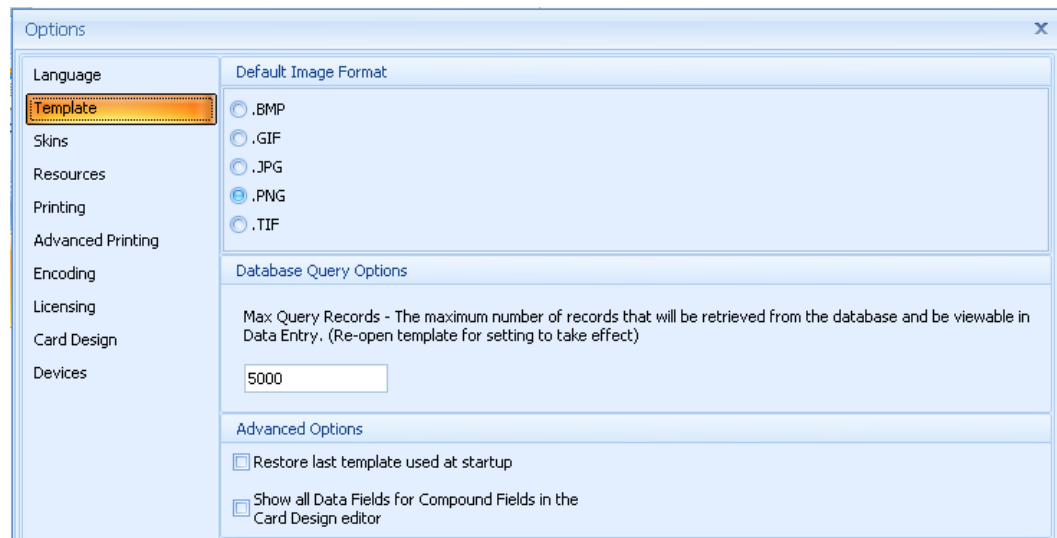
2

Choose the required **Template** in the column on the left side. See below.




3

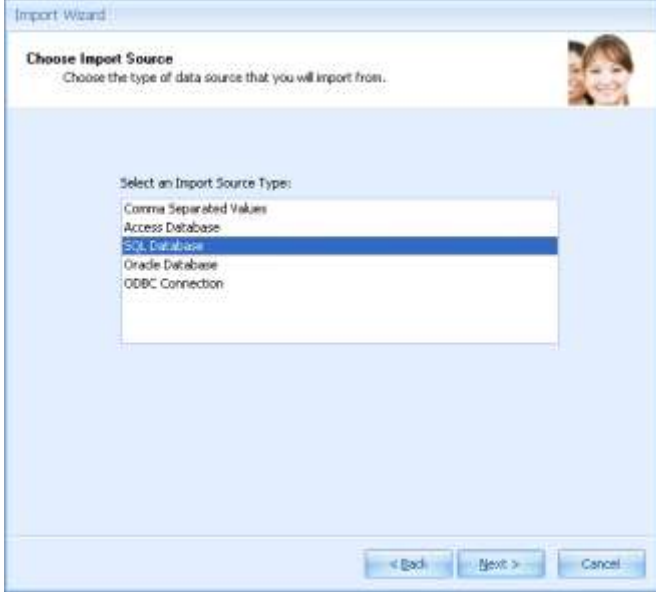
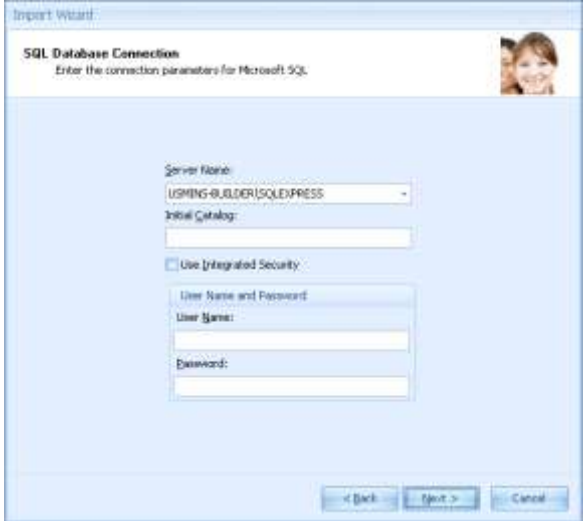
Under **Database Query Options**, set the value to the number of records (that you want the software to load when the templates are opened).  
You must select a value greater than 50 and less than 500,000.


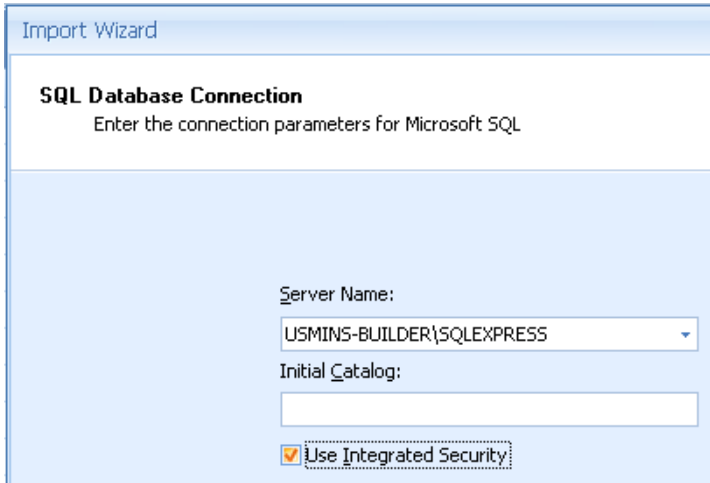


## 5.2.7 Importing Card Data (for SQL DB in Data Entry)

The purpose of this is to Import card data for SQL DB in Data Entry

Step	Procedure
1	Launch the Asure ID 7 software.
2	Enter your User ID and Password in the appropriate areas.
3	Access the Data Entry application.
4	Select template associated with data to be imported.
5	Access the <b>Database</b> tab on the Ribbon and select Import Wizard. 
6	After clicking <b>Next</b> in the initial Import Wizard dialog, select the SQL Import Source Type for the list.

		
7	<p>Specify the Server Name from dropdown.</p> 	



	
8	Specify the Initial Catalog name.
9	Specify the User Name and Password.
10	<p>Check the Use Integrated Security Checkbox if necessary. (<b>Note:</b> This feature uses the Windows Login information not assigned Login information.)</p> 
11	Select <b>Next</b> .
12	Select the specific table from the provided list that contains the specified data.
13	Select the template from the dropdown that contains the data.
14	In the <b>Field Links</b> dialog, you can map the data fields from Import Source fields to the fields on the template by highlighting a field from each box and clicking add.

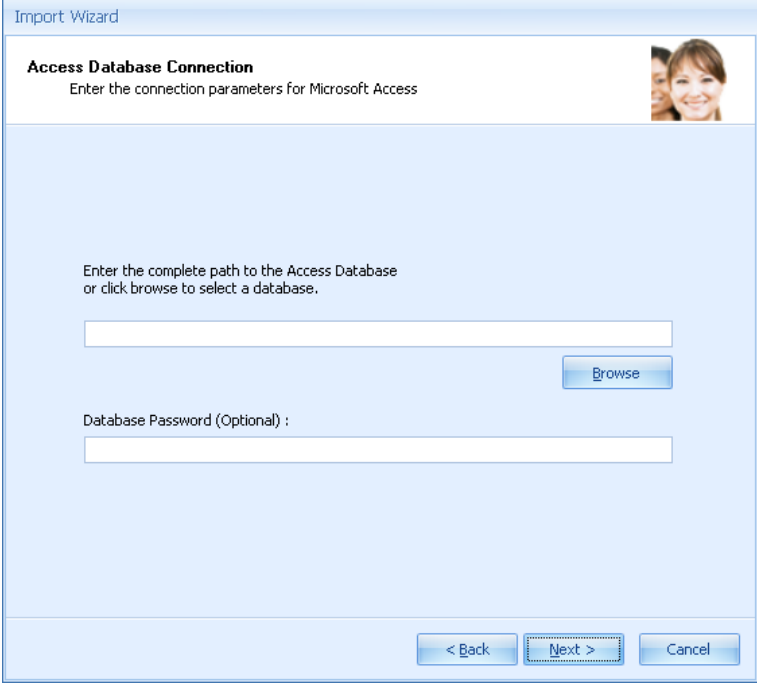
15	After all required fields are mapped, click <b>Next</b> .
16	In the <b>Import Options</b> dialog, you have these <b>Import</b> options: Update Existing Records Import New Records Import New Records Only Update Existing Records Only
17	Click <b>Next</b> .
18	Clicks <b>Begin Import</b> and <b>Next</b> . The records are imported.
19	Click <b>Finish</b> .
21	From the Application Menu, open that template to refresh the records.

### 5.2.8 Importing Card Data (for Access DB in Data Entry)

The purpose of this case is to Import card data for Access DB in Data Entry

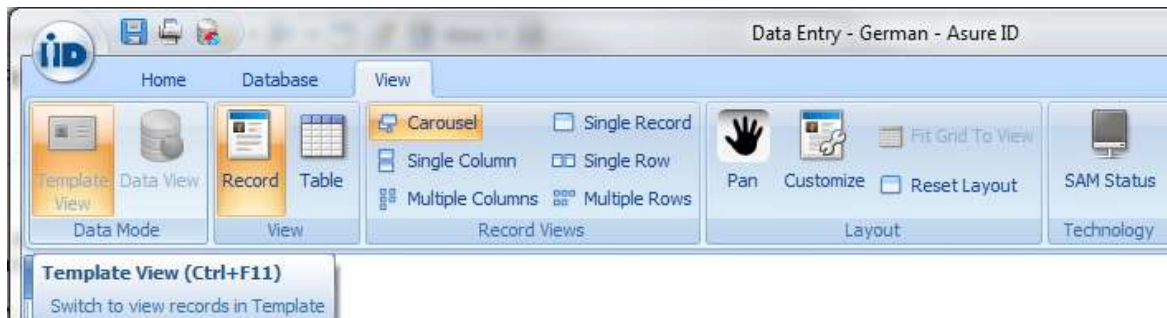
Step	Procedure
1	Launch the Asure ID 7 software.
2	Enter your User ID and Password in the appropriate areas.
3	Access the Data Entry application.
4	From the Application menu, select <b>Open Template</b> from the dropdown menu then select the template associated with data to be imported.
5	Access the <b>Database</b> tab on the Ribbon and select Import Wizard.

	
6	<p>After clicking next in the initial <b>Import Wizard</b> dialog the select the Access Import Source Type from the list.</p> 
7	<p>Select <b>Browse</b> button to locate the database to be imported.</p>

		
8	<p>Specify database password if necessary.</p> <p>Database Password (Optional) :</p> <input type="text"/>	
9	Select Table from list.	
10	Select the Table to import into.	
11	In the field links dialog, you can map the data fields from import source to the fields on the template by highlighting a field from each box and clicking <b>Add</b> .	
12	After all required fields are mapped, click next.	
13	In the Import Options dialog, you can choose to import all records as new records and (then) click on <b>Begin Import</b> .	
14	Records are imported.	
15	Click <b>Finish</b> .	
16	From the Application Menu, open that template to refresh the records.	

## 5.3 Selecting the View tab

### 5.3.1 Selecting Data Mode, View, and Record Views



Under the View tab, you can change how the data records are displayed in the workspace.

Select **View** to see the card in two formats.

Select **Record** to view records by template with all data presented to user. (**Note:** The images are visible in this record format.)

Select **Table** to view records in a grid / table format. You can see all records. (**Note:** The images are not visible.)

Select **Record View** for the Carousel or Single Row viewing.

Select **Carousel** to view one record at a time in a view. (**Note:** This view moves when you use the arrows or you click on the navigation items at the bottom of the application. The images are visible.)

Select **Single Row** to view multiple records in a row based on the entire record view. The images are visible.

Select **Layout to Customize**. (**Note:** With this function, you can customize views by selecting objects and moving the order or location of the items

**Template card** allows you to move data fields around in the view by selecting a field and moving it up or down. (**Note:** Hidden Items can be moved into or out of the view.)

**View layout** allows you to preview your newly customized view.



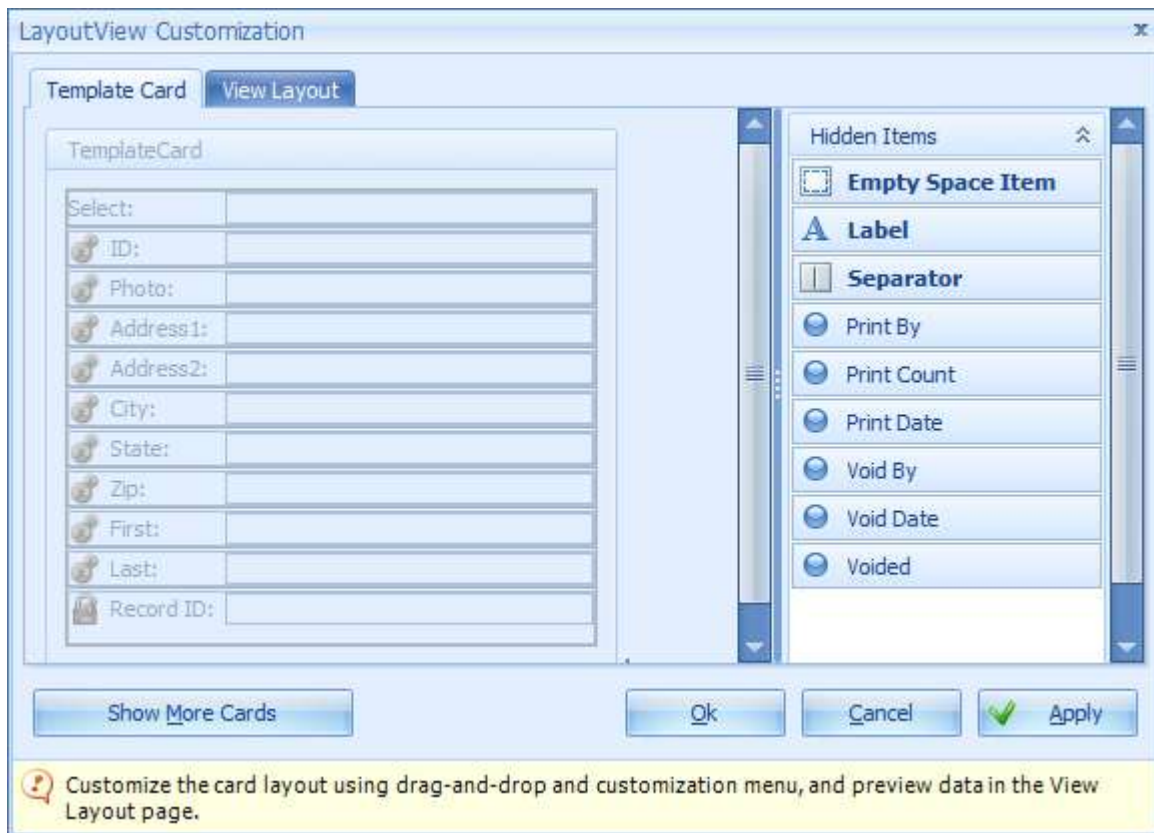
### 5.3.2 Selecting Layout, Pan, Customize, Fit Grid to View and Reset Layout



Selecting **Pan** allows user to scroll templates with large numbers of data fields, which do not fit in the current viewing area of the screen, vertically to see and manipulate fields that are not currently in view.



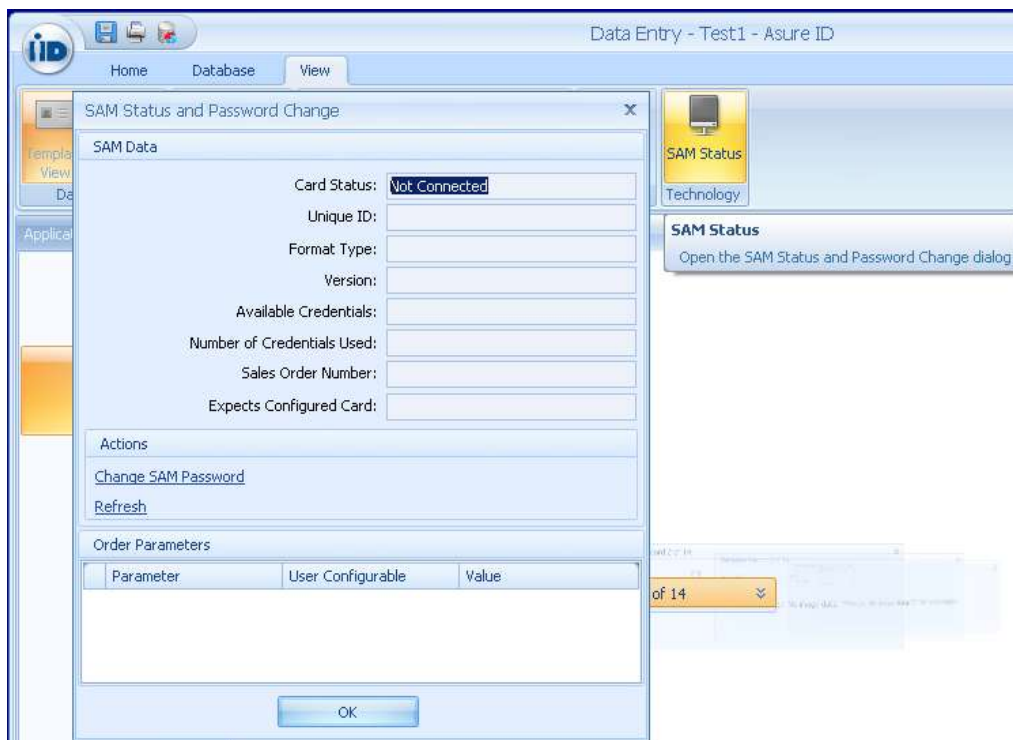
Selecting **Customize** allows users to define how the fields and photos and signatures in the template are formatted in the Layout View. These changes are saved and will be recalled the next time the template is loaded.



Selecting **Fit Grid To View** can be used to toggle if the user can scroll horizontally to view columns not currently in view or if all the columns will be condensed into the current view. Recommended to be off for templates that contains a large number of data fields.

Selecting **Reset Layout** clears any user customizations to the current view.

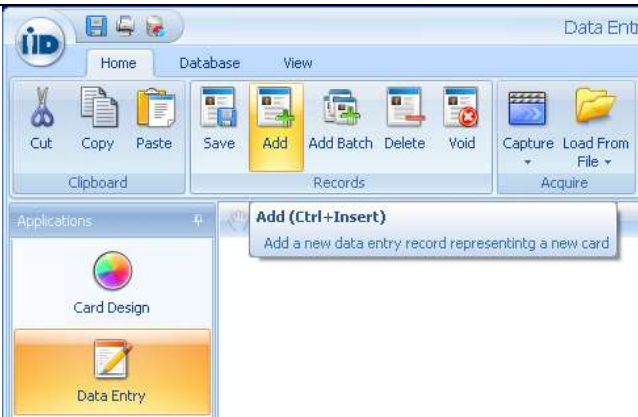

### 5.3.3 Selecting Technology – SAM Status



### 5.3.4 Adding Cards without Printing in Data Entry

The purpose of this Data Entry is to add a card without printing

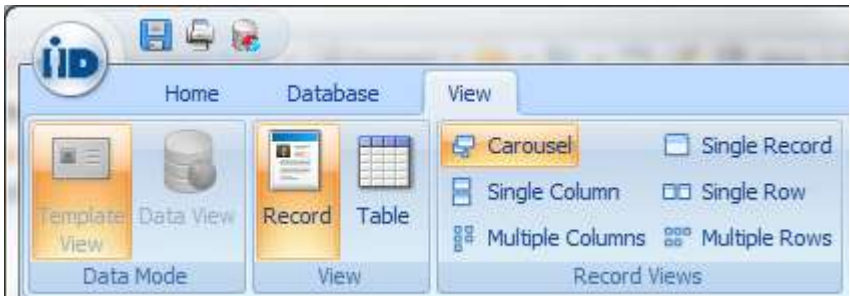
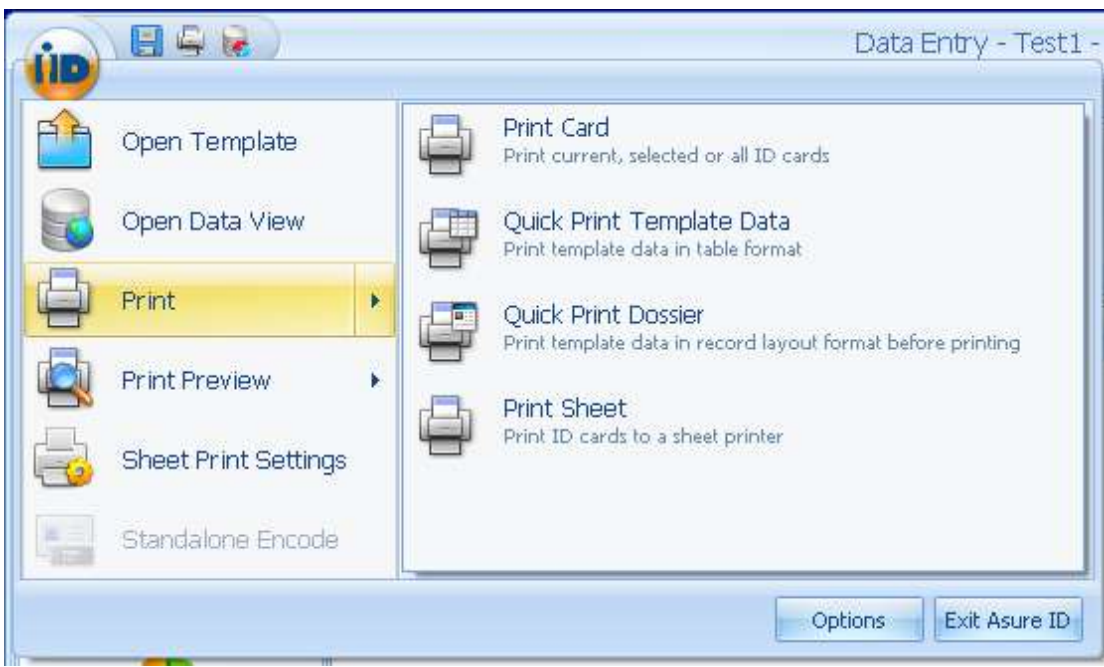
Step	Procedure
1	Launch the Asure ID 7 software.
2	Enter your User ID and Password in the appropriate areas.
3	Access the Data Entry application.
4	Access the Application Menu and select Open Template from the dropdown menu.
5	Add a record by going to the <b>Record</b> section on the Ribbon and clicking on <b>Add</b> .

	
6	Click on each field where data entry is required and fills in the appropriate data.
7	<p>Click the <b>Save</b> icon on the Ribbon. (<b>Note:</b> a preview rendering of the card will display on the right hand preview pane.)</p> 

### 5.3.5 Using the Carousel View to reprint cards


The purpose of this Data Entry is to reprint an existing card.

Step	Procedure
1	Launch the Asure ID 7 software.
2	Enter your User ID and Password in the appropriate areas.
3	Access the Data Entry application.
4	Access the Application Menu and select Open Template from the dropdown menu.
5	Access the <b>Find</b> section on the Ribbon and select <b>Find</b> .
7	In the <b>Find</b> dialog, select the specific field for data on the record to be found or

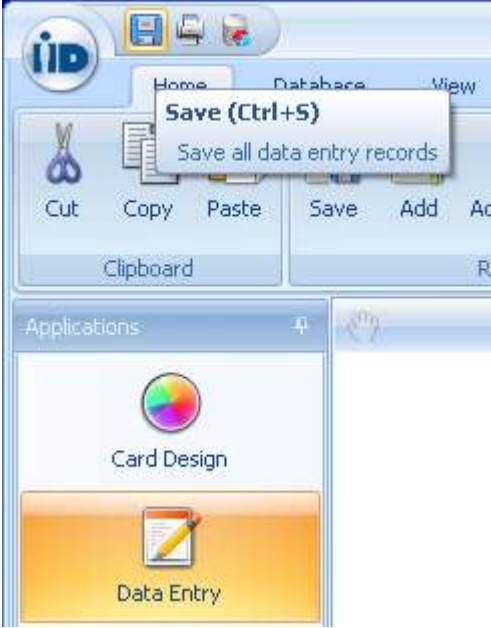

	leaves Search Column at ALL.
8	Type in the specific record data in the find field and click <b>Find Next</b> .
9	Carousel view spins to a specific record, if set up to use Carousel View. 
10	Click <b>Cancel</b> to view the record.
11	Click on the <b>Print</b> icon next to the Application Menu or open the Application Menu for the print options. 

### 5.3.6 Printing Cards for New Employees

The purpose of this case is to print a card for a new employee

Step	Procedure
1	Launch the Asure ID 7 software.
2	Enter your User ID and Password in the appropriate areas.
3	Go to the Data Entry application.
4	Open the Template through the Application Menu.
5	From the <b>Records</b> tab, select <b>Add</b> .
6	Fill out the <b>Name</b> and add a Photo by right clicking in the Photo area. The Photo may be captured from a camera or loaded from a file. The Photo may be edited.
8	The Photo may also be captured using the Acquire tab.  
9	Select <b>Save</b> .



	 <p>The screenshot shows the HID software interface. At the top, there is a toolbar with icons for Home, Database, and View. Below the toolbar is a menu bar with options: Cut, Copy, Paste, Save, Add, and Add Batch. A tooltip for the 'Save' option is displayed, showing the text 'Save (Ctrl+S)' and 'Save all data entry records'. Below the menu bar is a section labeled 'Applications' with two icons: 'Card Design' and 'Data Entry'.</p>
10	<p>Click on the <b>Print</b> icon next to the Application Menu or open the Application Menu for the print options.</p>  <p>The screenshot shows the HID software interface. At the top, there is a toolbar with icons for Home, Database, and View. Below the toolbar is a menu bar with options: Cut, Copy, Paste, Save, Add, and Add Batch. A tooltip for the 'Print' option is displayed, showing the text 'Quick Print' and 'Print with current Quick Print settings'. Below the menu bar is a section labeled 'Applications' with two icons: 'Card Design' and 'Data Entry'.</p>

## 5.4 Screen Layout

The Application button gives the user the ability to select the following general functionalities with options in each. Highlight the icon for the definition of each function.

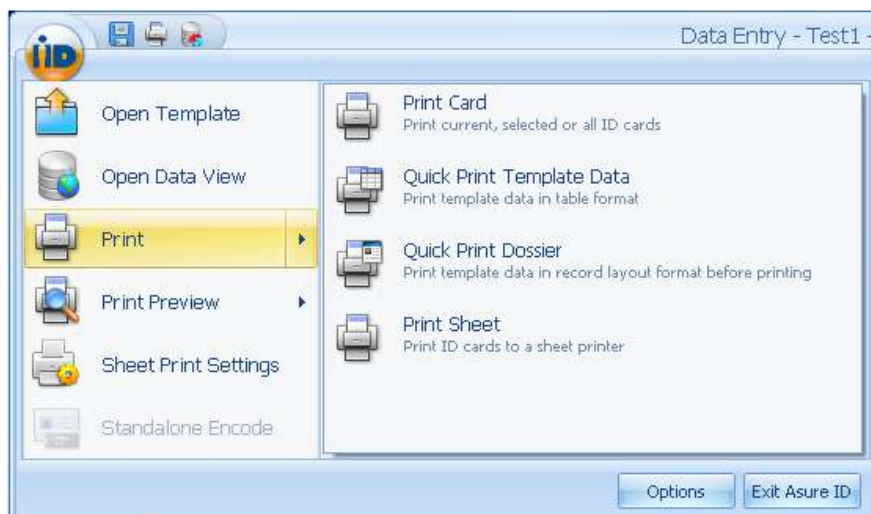
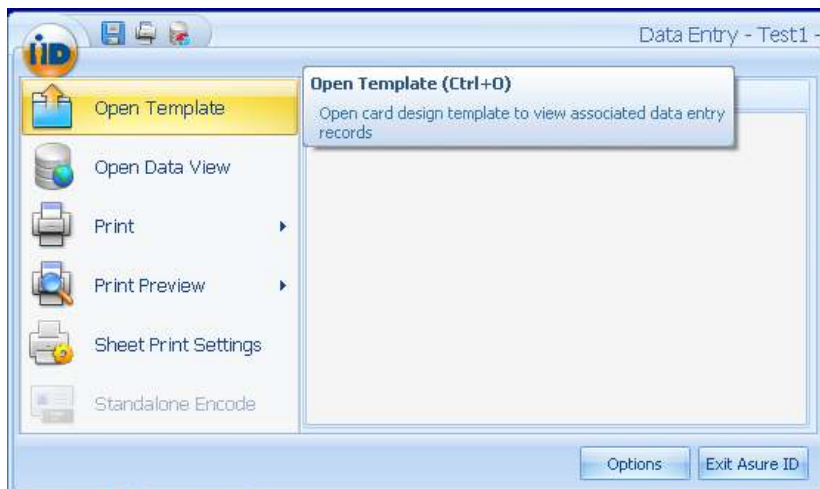
Select **Open** to display recently opened templates in right half of pane.

Select **Print** to display print options such as Print Cards, Template Data and Sheet printing.

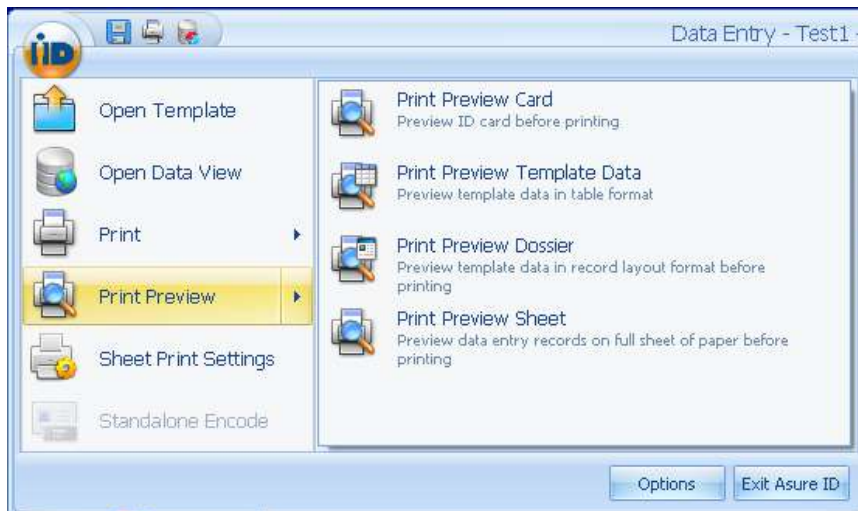
Select **Preview** to display preview options before printing the final card.

Sheet **Printing Settings** for printing test cards to a page printer for review.

Select Standalone Encode is used in iDIRECTOR to read encoded data to be printed on the card or stored in the database.







## 5.5 Application Menu

### 5.5.1 Open Template

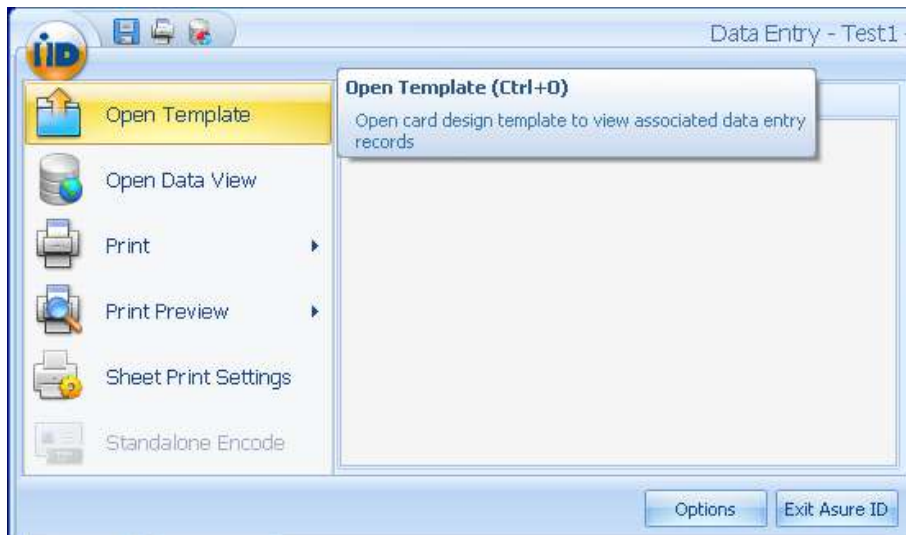
**Open Template** allows you to select any previously-saved or imported templates. (**Note:** This allows you to work from pre-existing and predefined templates. Be sure and save your work after you make additions to your template.)

Click on the **Application Menu** icon to open the Application Menu.

Click on **Open Template** to bring up the Open Template window and access an existing, predefined template (for your use).

Select the required template and click on **OK** to open up a template file.

Click on **Cancel** to close out the window without accessing a template file.



## 5.5.2 Record Viewing

You can select the Data Entry application (Multiple Record view) to display a data grid.

**Presentation:** Each individual data field is presented in the horizontal axis. Each data record in the data set is presented in the vertical axis.

**Preferred Viewing:** The view is preferable when entering large numbers of dates.

**Sample Window:** See the Data Entry application Window Table view (below).


## 5.5.3 Open Data View

Data Views are similar to Live Links. (**Note:** However, a Live Link is just for one template. Once a Data View is created, it can be used across multiple templates.)

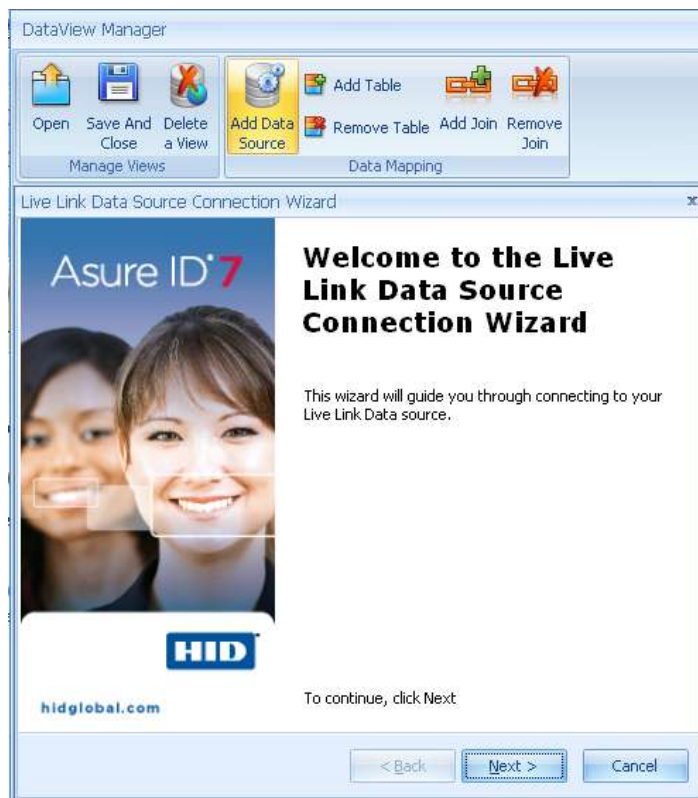
Data Views allows you to set up relationships between tables.

Data Views must be set up before you can create a template to use this data source.

Once a Data View is set up for a template, the **Live Link** option is no longer available for that template.

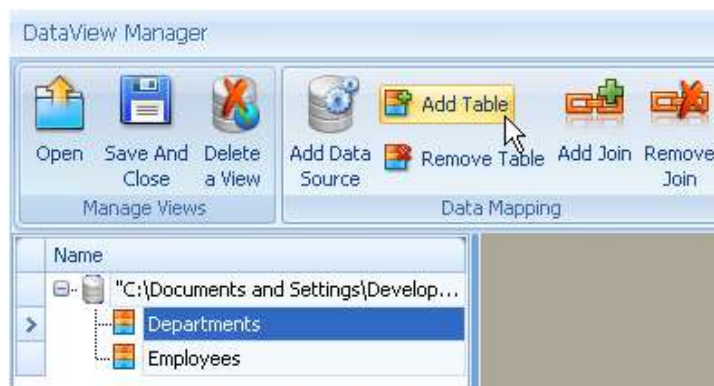
Step	Procedure
1	To create a <b>Data View</b> , in the Card Design application, click on the Card Setup tab.
2	<p>In the <b>Live Link</b> portion of the Ribbon, choose <b>Data View</b>. Select Create or Edit a Data View. See below.</p> 
3	View the Data View Manager window.

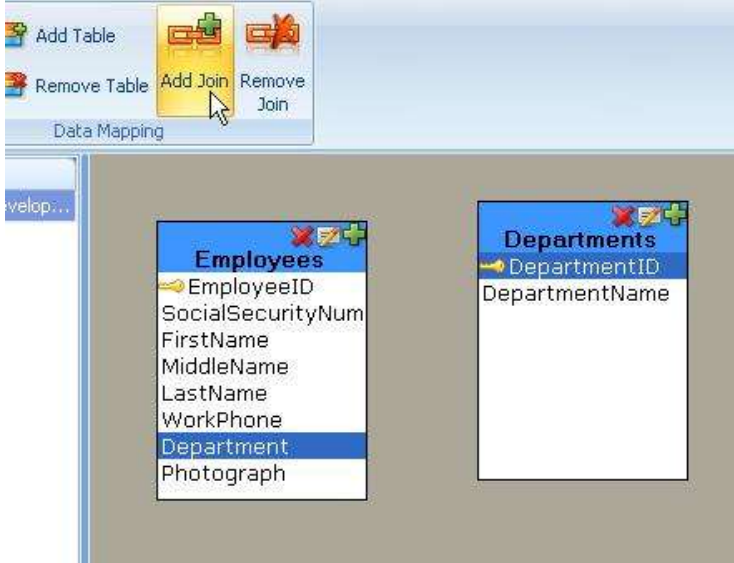

- 4 Add a Data Source by clicking on the **Add Data Source** icon in the Ribbon. (**Note:** The process here is the same as setting the data source for a Live Link.)

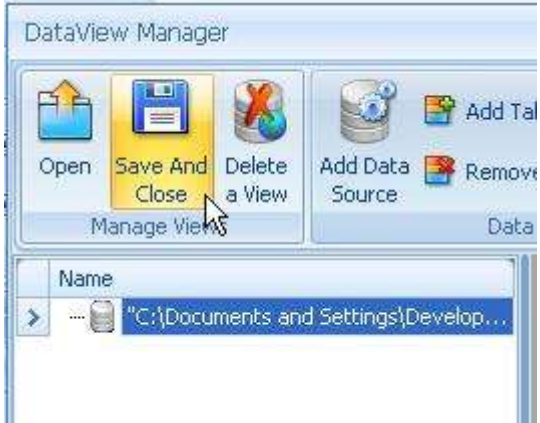



- 5 View the tables for that Data Source along the left side of the window (once that Data Source has been set up).

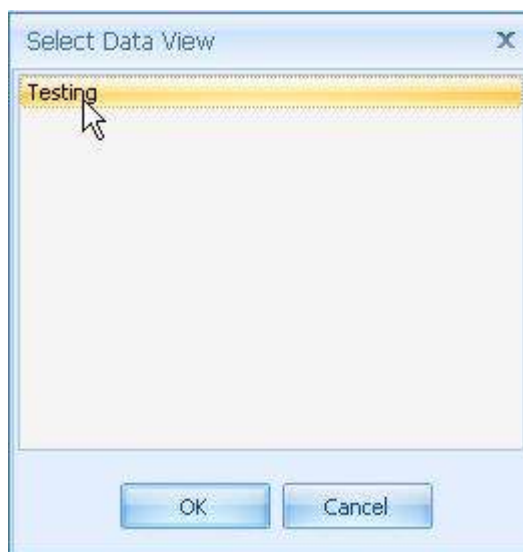
- 6 Add these tables to the Data View.  
Highlight the table (you would like to add).  
Click the **Add table** button.



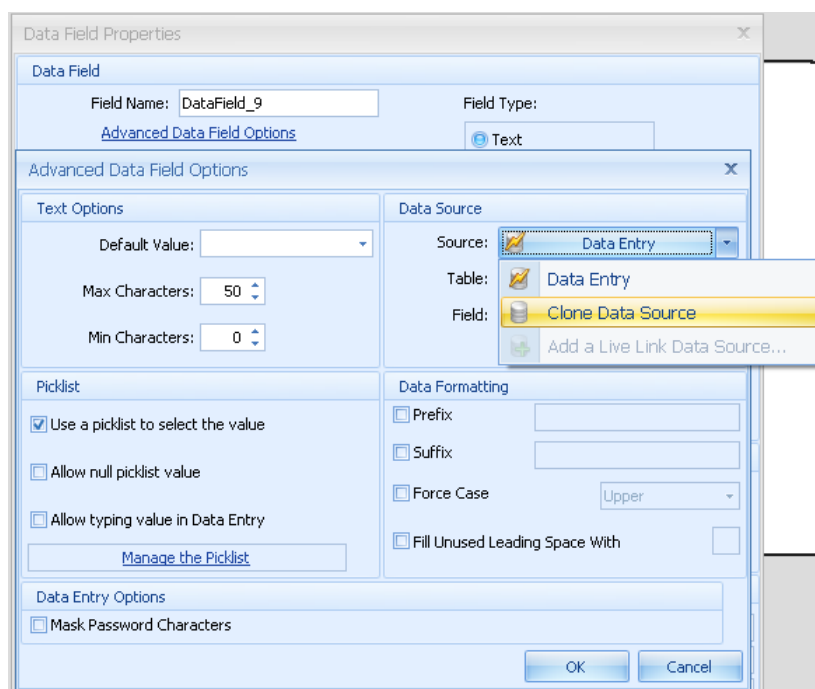
7	<p>Join the tables once they (the tables) are added to the <b>Data View</b>. (<b>Note:</b> The tables must be related by the field in the primary table, as it relates in turn to the Key field in the secondary table.) See below.</p> <p>Example (procedure):</p> <p>Select the Department field in the <b>Employees</b> table.</p> <p>Select the DepartmentID (key field) in the <b>Departments</b> table.</p> <p>Click on the <b>Add Join</b> button in the Ribbon.</p> 
8	<p>Note in the Data View.</p> <p>All the table fields are listed, which allows you to use those fields, as required.</p> <p>You may need to remove, rename, or add back in fields by using the three (3) small icons in the table headers. See below.</p> 
9	<p>Save the <b>Data View</b> once you set it up. (<b>Note:</b> This will close the Data View Manager window.)</p>

	
10	<p>Link the <b>Data View</b> to your template. (<b>Note:</b> It will be used in your template as a <b>Data Source.</b>)</p> 

- 11 Select the **Data View** to link to your template. Click **OK**.



- 12 In the **Advanced** options of data fields, you can change the source to the Data View. (**Note:** The name of the source is listed here. It is not the name of the Data View.)



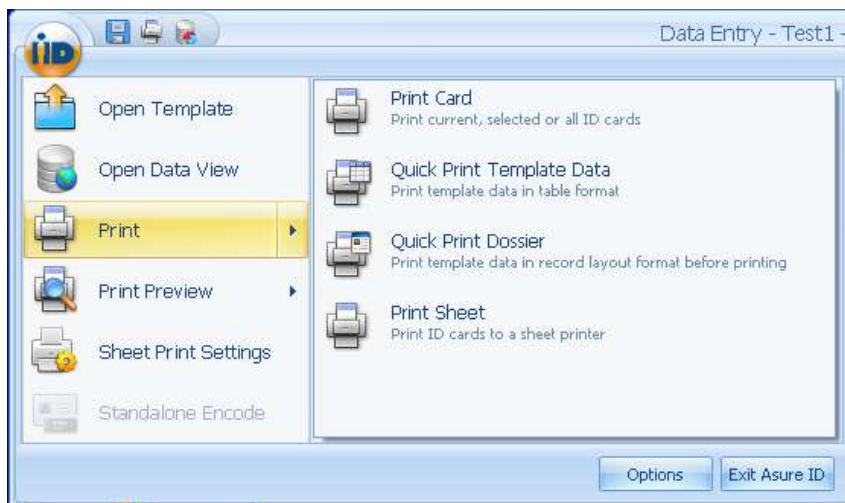
## 5.5.4 Print

Printing from the Data Entry application is accomplished by clicking the application button (upper left corner of the screen) and selecting the **Print** option or **Print** button.

If you are in the single record view, the data record displayed will be printed on the card printer.

If you are in the multiscard view, all selected records will be printed on the card printer.

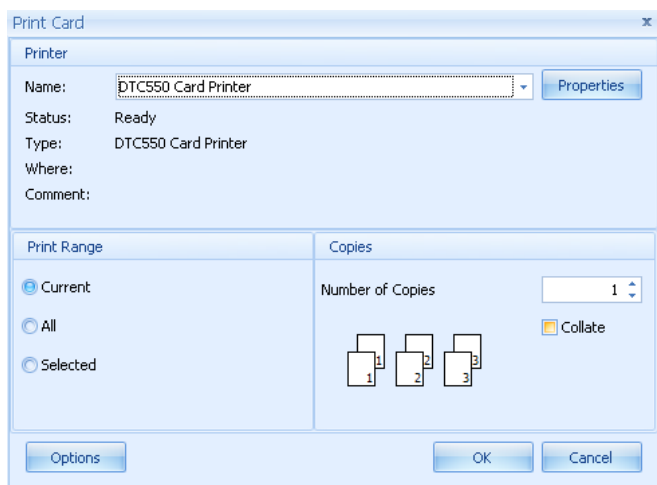
Printing options appear in the dropdown menu. Select the required option.



Follow these instructions:

Select the printer.

Set the driver properties.

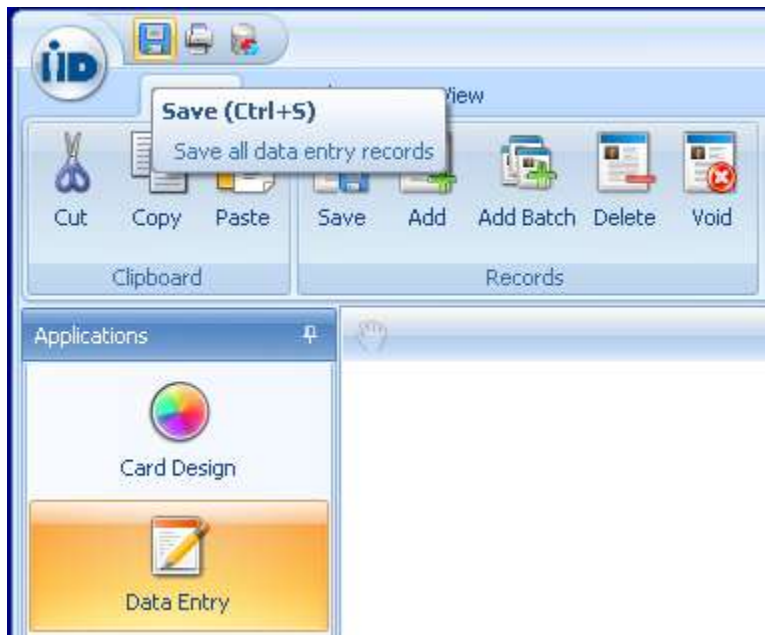


start here



### 5.5.5 Printing Cards with Data in Data Entry

The purpose of this case is to print a card with data

Step	Procedure
1	Launch the Asure ID 7 software.
2	Enter your User ID and Password in the appropriate areas.
3	Go to the Data Entry application.
4	From the Application menu, select Open Template from the dropdown menu.
5	From the <b>Records</b> option on the Home tab click on <b>Add</b> .
6	Click on each field where data entry is required and fill in the appropriate data.
7	<p>Click the <b>Save</b> icon on the Ribbon. a preview rendering of the card will display on the right hand preview pane.</p>  <p>1.</p>
8	<p>1. Click on the <b>Print</b> icon next to the Application Menu or open the Application Menu for the print options.</p>



## Section 6: Using the Reports Application

The Reports application supplies you with a number of preformatted report options dealing with the operation of the application.

Launch the Asure ID 7 software.

Enter your User ID and Password in the appropriate areas.

The Reports are broken down into 3 Categories.

User Reports

Data Entry Reports

Card Design Reports



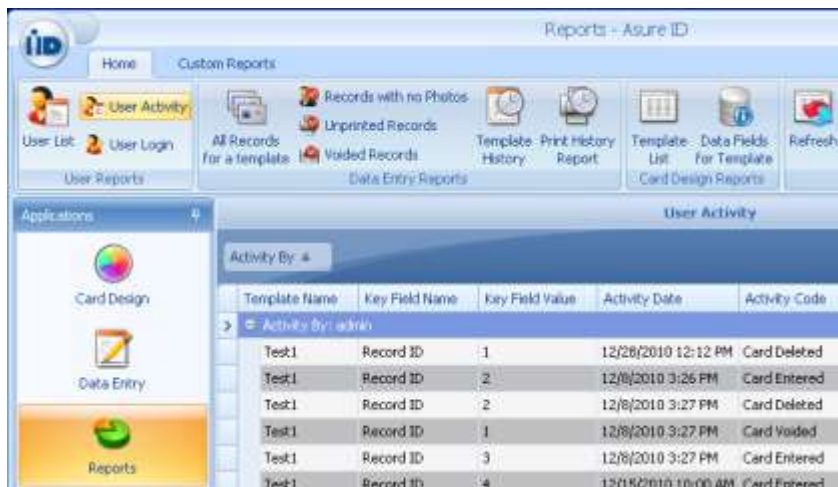
### 6.1 Selecting the Home tab



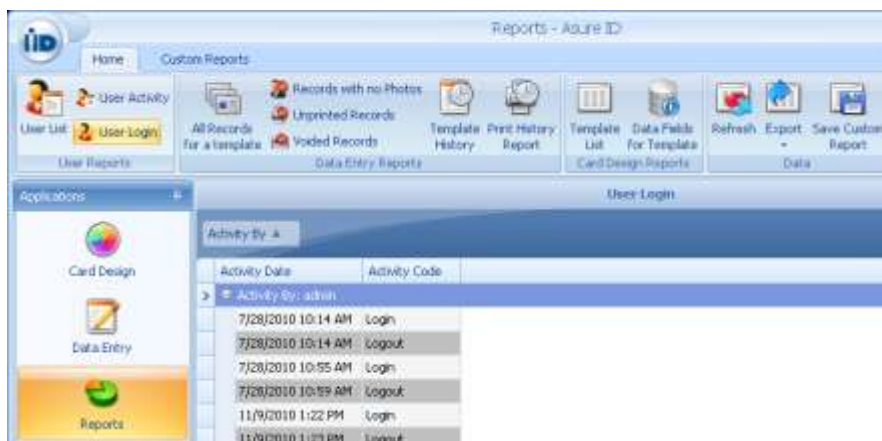
### 6.1.1 Selecting User List – User Reports



### 6.1.2 Selecting User Activity – User Reports



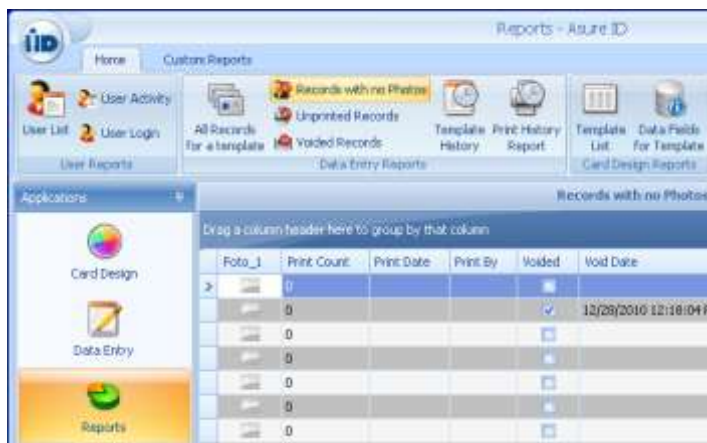
### 6.1.3 Selecting User Login – User Reports



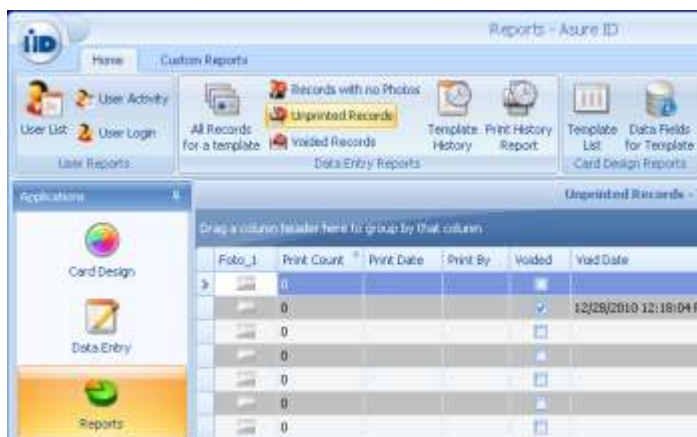
## 6.1.4 Selecting All Records for a template – Data Entry Reports



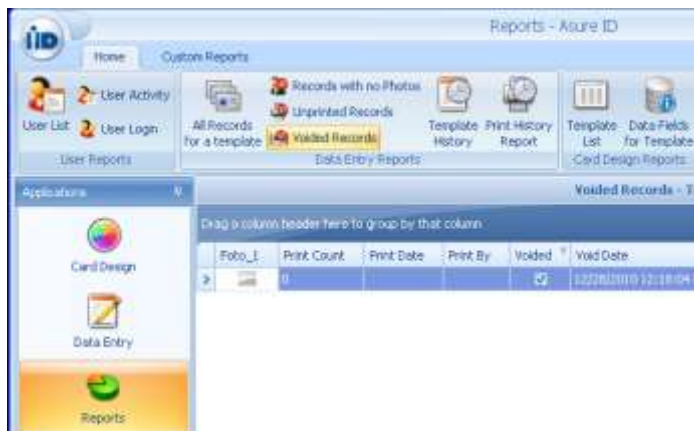
## 6.1.5 Selecting Records with no Photos – Data Entry Reports



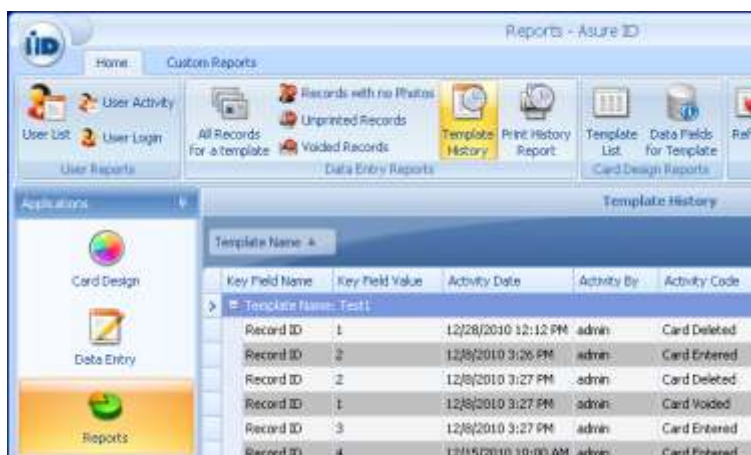
## 6.1.6 Selecting Unprinted Records – Data Entry Reports



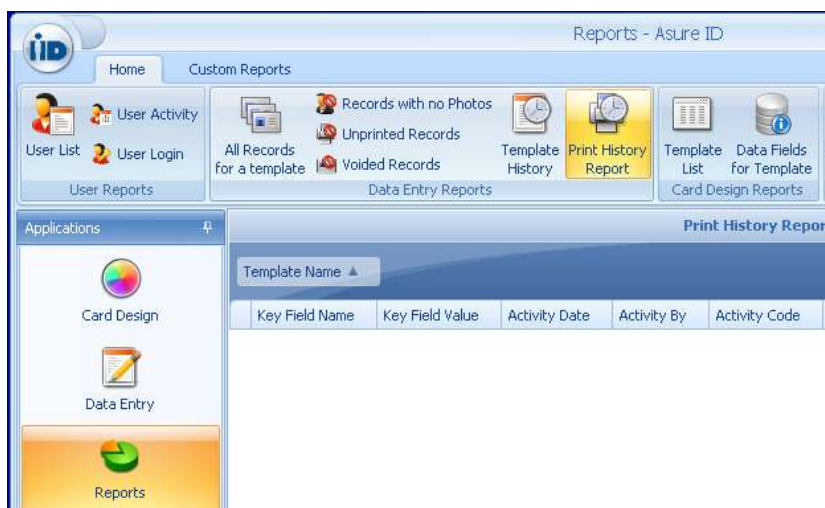
## 6.1.7 Selecting Voiced Records – Data Entry Reports



## 6.1.8 Selecting Template History – Data Entry Reports

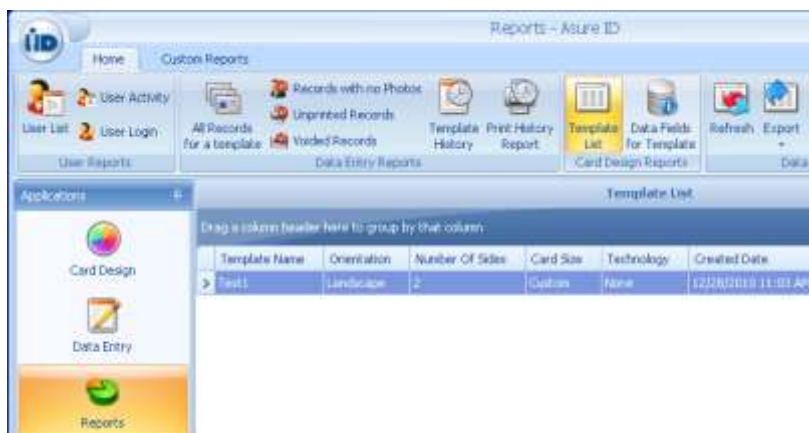


## 6.1.9 Selecting Print History Report – Data Entry Reports

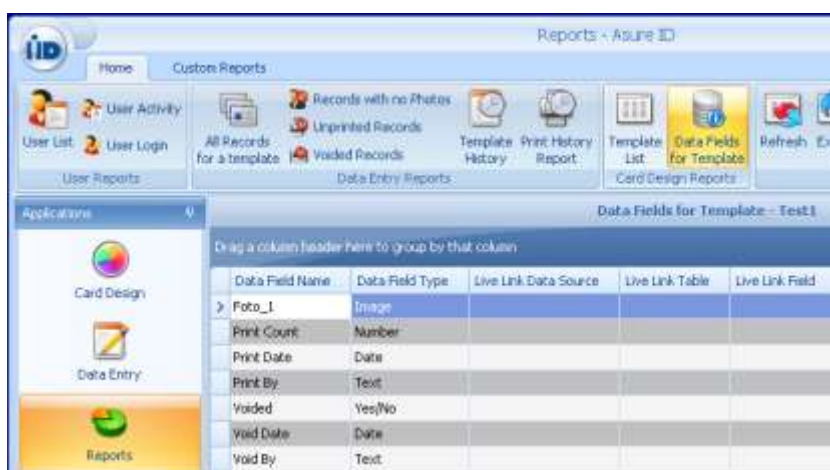




## 6.1.10 Selecting Template List – Card Design Reports



## 6.1.11 Selecting Data Fields for Template – Card Design Reports



## 6.1.12 Selecting Refresh – Data

Once a report has loaded into the preview window, the data being displayed can be refreshed using the **Refresh Data** button. (**Note:** Report exports in the DevExpress reports format.)



### 6.1.13 Selecting Export – Data

Once a report has loaded into the preview window, it can be exported to one of several formats. The available formats include:

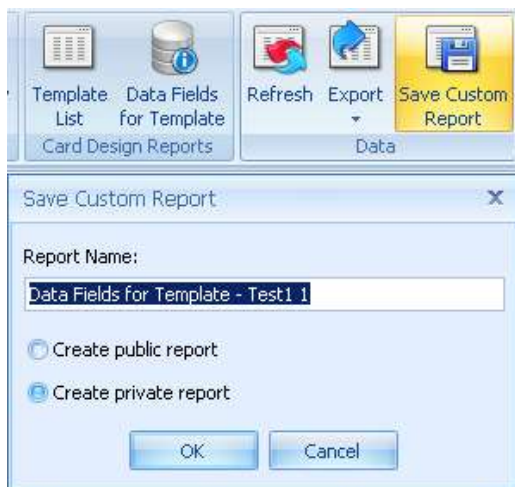
PDF (requires Adobe Acrobat to view)

RTF (rich text format)

Excel (Requires Microsoft Excel or equivalent viewer to view)



### 6.1.14 Save Custom Report – Data

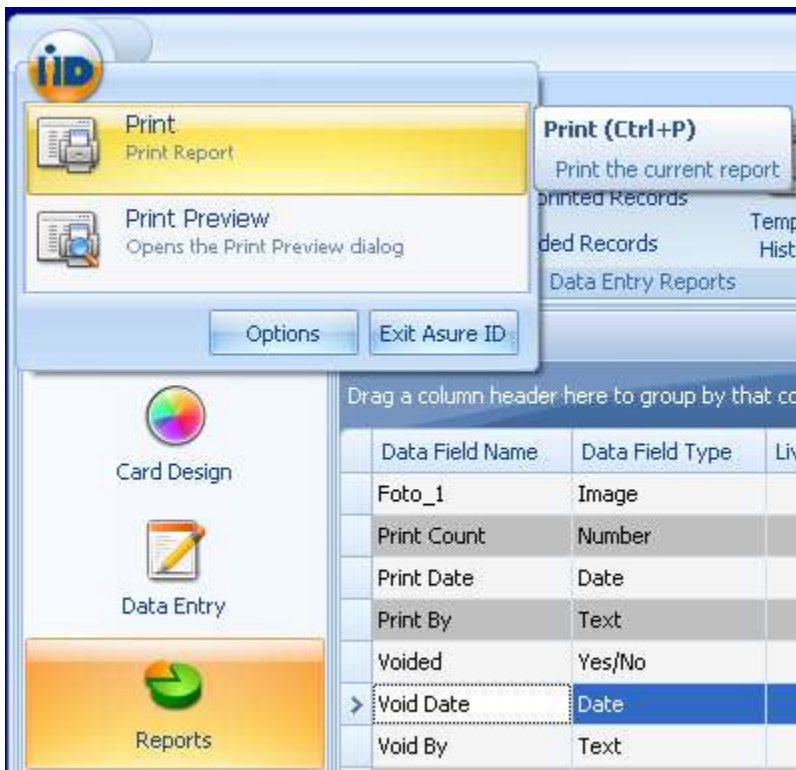


## 6.2 Selecting Custom Reports – Private Reports





## 6.3 Selecting Print Report

With a report loaded in the preview window, click **Print Report** from the application menu.

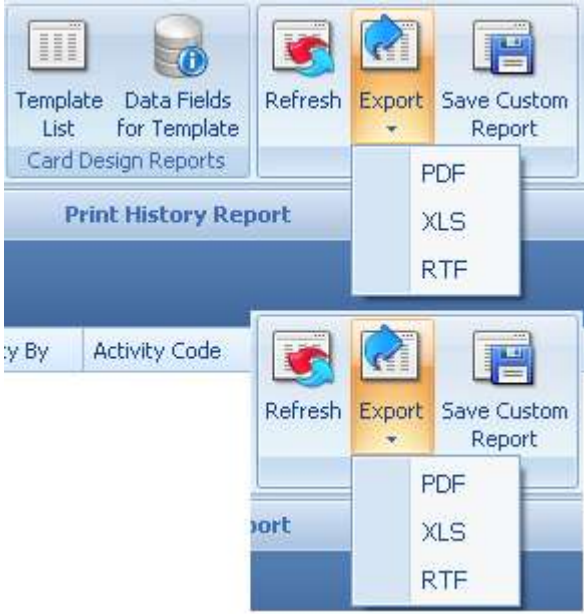
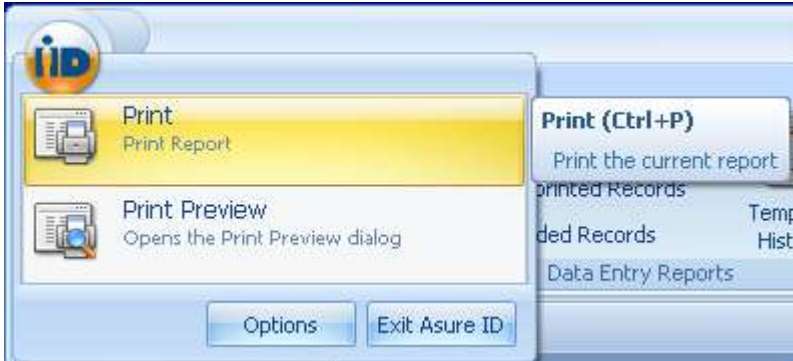


## 6.4 Generating Reports

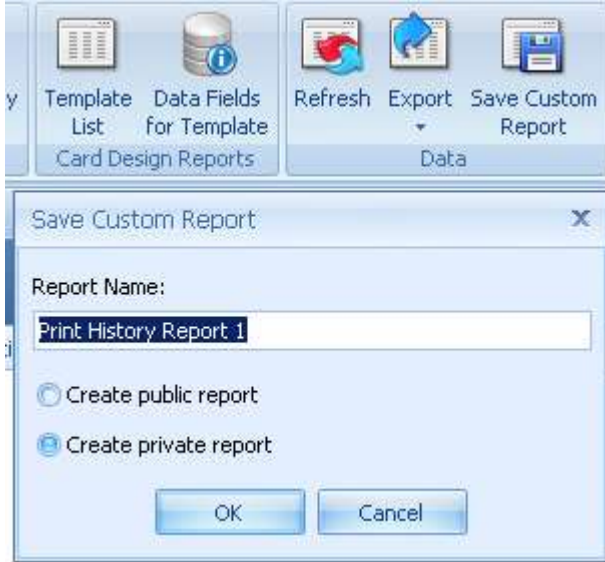
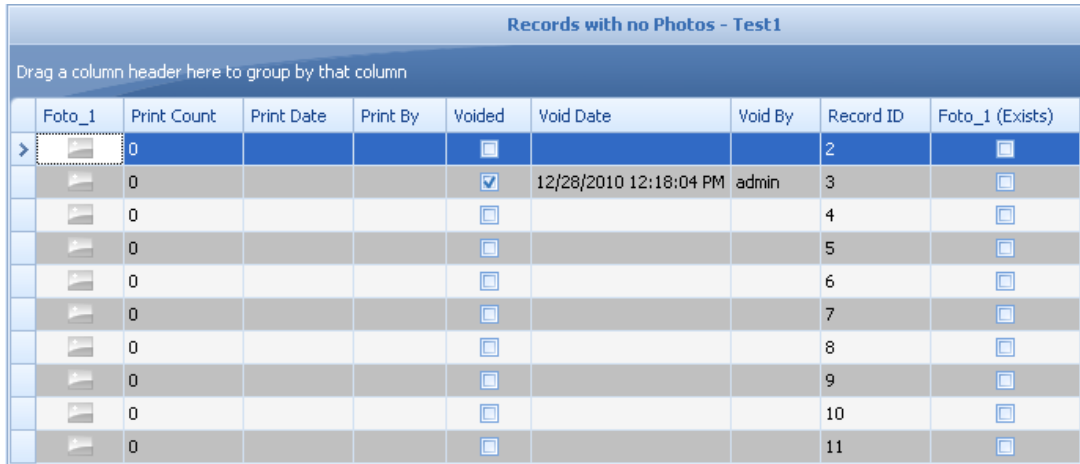
The purpose of this case is to generate a Report.


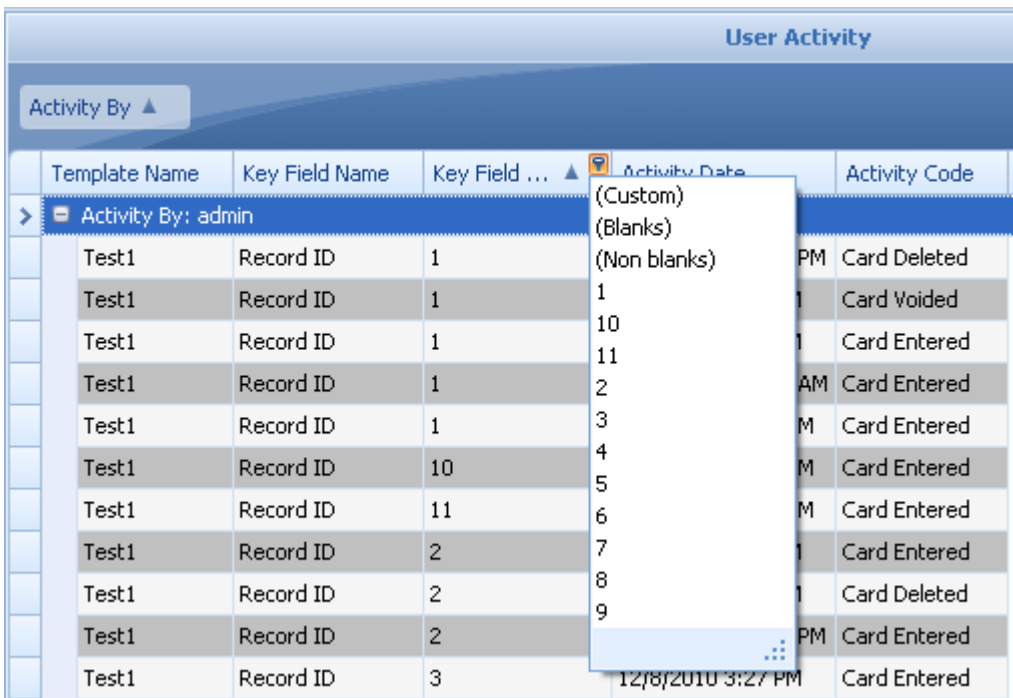
Step	Procedure
1	Launch the Asure ID 7 software.
2	Enter your User ID and Password in the appropriate areas.
3	Go to the Reports application.
4	Select the Report Type for User Reports, Data Entry Reports, Card Design, or Data Reports.
5	<p>Select the Report Name –Print History Report for this example.</p> 
6	<p>Once a report has loaded into the preview window, the data being displayed can be refreshed using the <b>Refresh Data</b> button. (<b>Note:</b> Report exports in DevExpress Reports format.)</p> 





7	<p><b>Exporting the Report</b></p> <p>Once a report has loaded into the preview window, it can be exported to one of several formats. The available formats include:</p> <p>PDF (requires Adobe Acrobat to view)</p> <p>RTF (rich text format)</p> <p>Excel (Requires Microsoft Excel or equivalent viewer to view)</p> 
8	<p>When selecting an <b>Export</b> option, you will be prompted for a location to save the file. Choose a folder and click the <b>Save</b> button to continue.</p>
9	<p><b>Printing a Report</b></p> <p>With a report loaded in the window, click <b>Print Report</b> from the application menu.</p> 

## 6.5 Using the Custom Report Feature

Step	Procedure
1	<p>An existing or new report may be edited or filtered and saved for future use as a Custom Report. (<b>Note:</b> You can create a unique name for the report. It may be saved as a public or private report.)</p> 
2	<p>Any report column may be grouped by left clicking and dragging the column header up above the grid to the Grouping section. This allows for your unique sequence of lining up the headers for the report.</p> 
3	<p>Select the Button to filter and view the report data. This will further customize your report.</p>

	
4	<p>Right click on the TAB to sort the Report data. Each column may be altered with these options, as shown below.</p> 
5	<p>Once the Custom Report is Saved, it is available for viewing from the Home Ribbon.</p>

	
	<p>The Custom Report may be Run again or Deleted or Renamed.</p> 

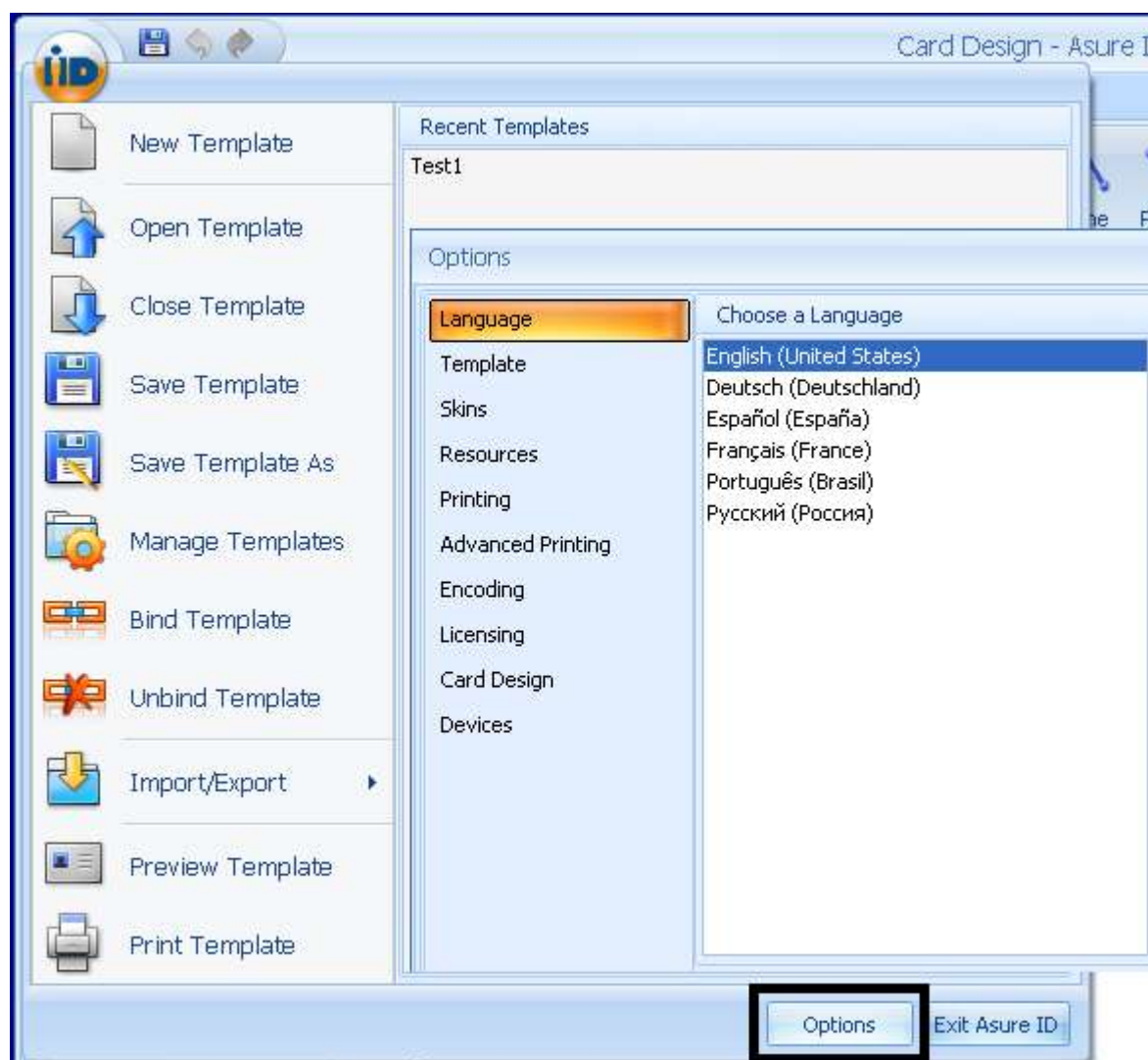
## Section 7: Options Menu

This menu displays controls used to perform actions like **Save** and **Print**. It also provides a list of recent documents, access to application options for changing user settings and preferences and application exit.

The OPTIONS section provides instructions on Language, Rendering, Skins, Resources, Printing, Advanced Printing, Encoding, Licensing, Card Design and Devices.

From the Application Menu, click on **Options** to bring up the choices, as shown below. You will be using the processes or functions on this dropdown menu repeatedly.

Select the appropriate work task or process by clicking on the icon. You will bring up the respective dialog in order to work within that task or process.

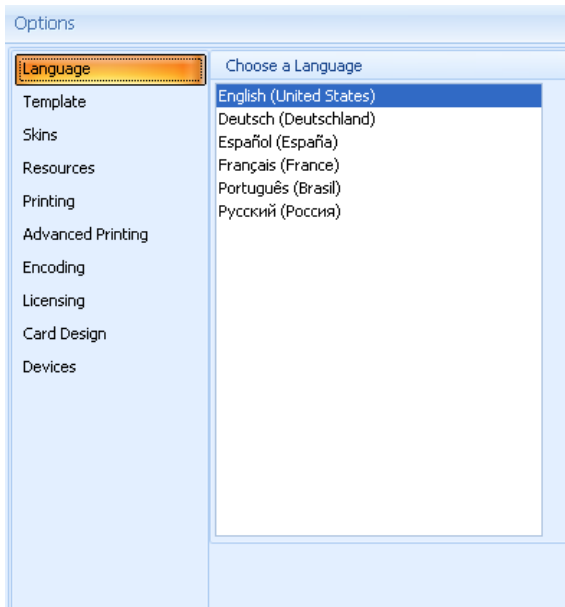


## 7.1 Choosing a Language (Options)

Follow these instructions:

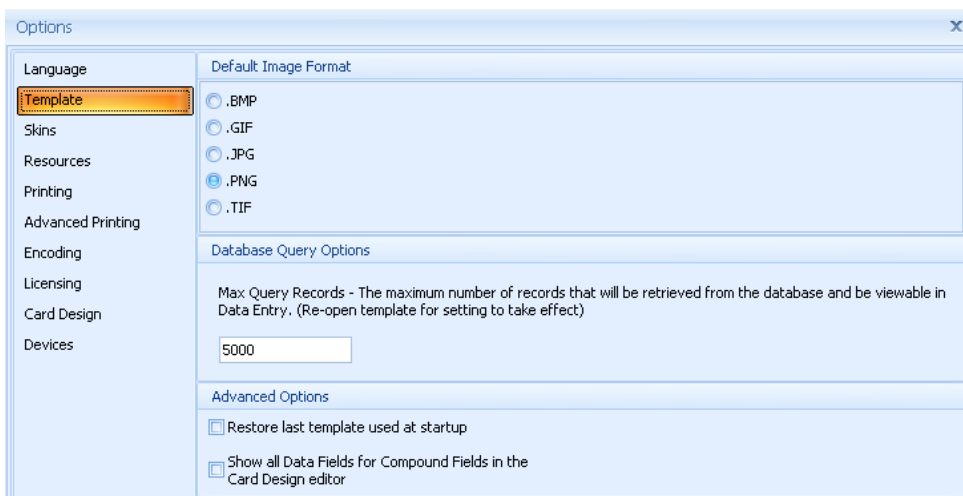
Select the required (available) language, as shown below.

Click **OK** to accept the option. Click on **Cancel** to exit without saving your work.



## 7.2 Selecting the Template options

**Default Image Format:** Png is the default image format used in Asure ID 7. This option provides the ability to override this default image format from within the Photo and Signature property dialog. Set up the desired format for your image. This will be applied when you use the PHOTO or SIGNATURE option in CARD DESIGN.



## 7.3 Choosing Skins (Option)

Follow these instructions:

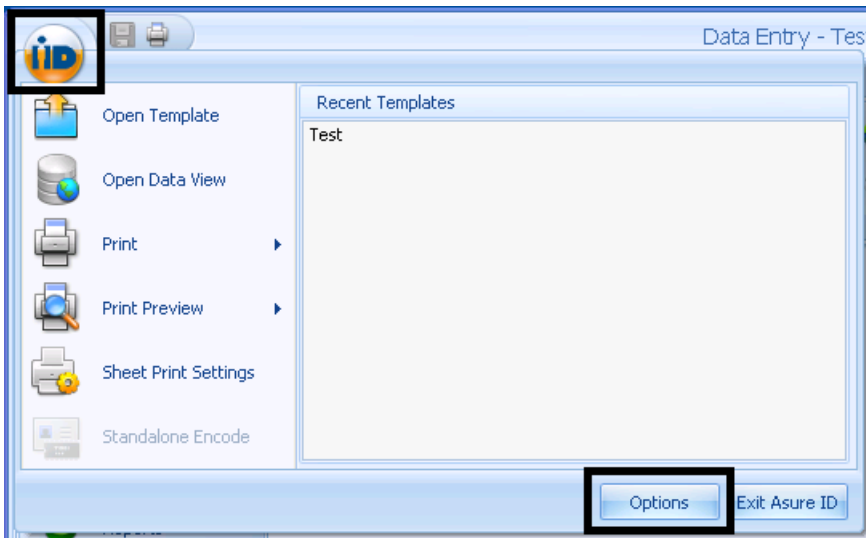
Select the radio button for the **Skins** or background, as shown below.

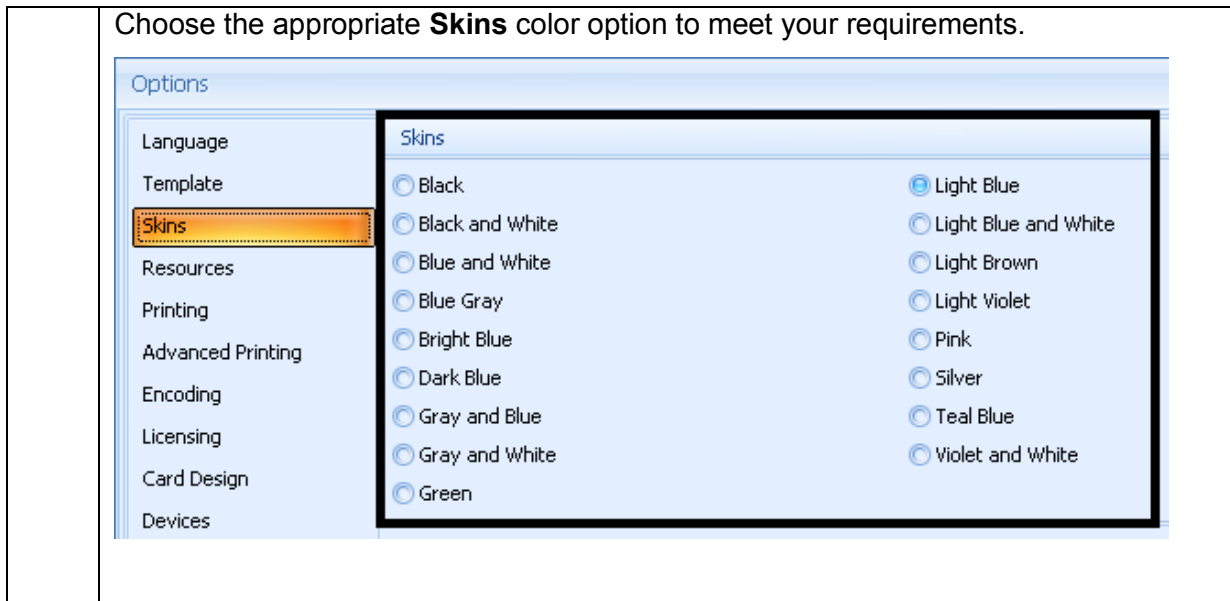
Select different skin to change the background colors and theme of Asure ID 7.

Click **OK** to accept the option. Click on **Cancel** to exit without saving your work.



### 7.3.1 Choosing a Different Skin (Upper Left Icon > Options > Skins)

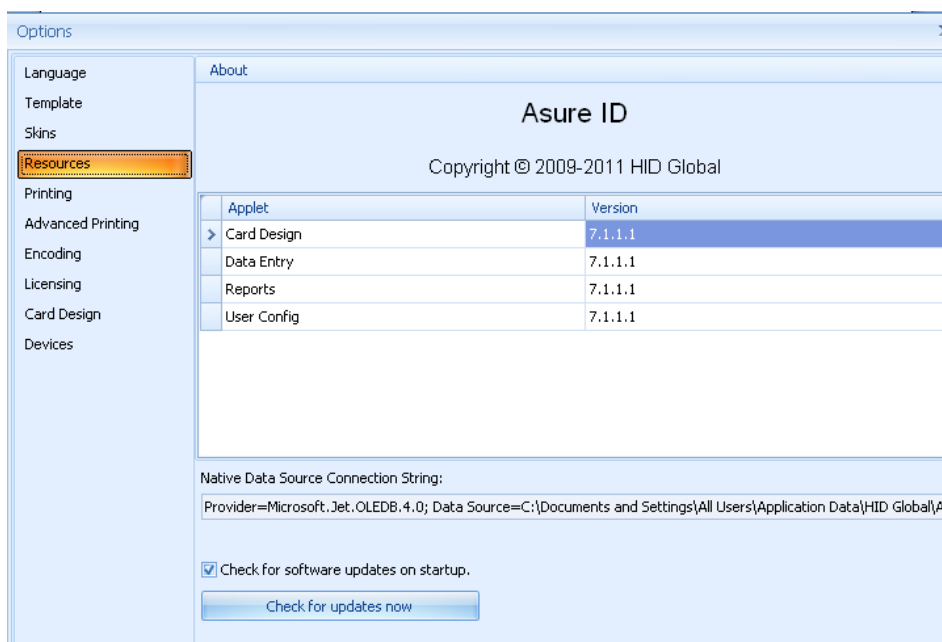
Step	Procedure
1	<p>Open Asure ID 7 and go to the <b>Options</b> menu.</p> 
2	<p>Choose <b>Skins</b> in the LEFT SIDE column.</p>



## 7.4 Viewing the Resources window

This About window has the specific version number for Card Design, Data Entry, Reports, and User Config.

Select the checkbox for automatic software updates when the program is opened. Internet access is required for this process.





## 7.5 Choosing Printing Settings

**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 you 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.

Follow these instructions. See the display on the below for a reference.

Select Auto-detect, Native Commands, Flatten Image for Printing, Stretch, Center, and No Adjustment options (shown below).

The left side is the rendering method used for printing.

**Auto Detect:** Asure ID will determine when to pre-render, based on the type of objects on the card, and the capabilities of the printer. This is the default setting which should be used for the majority of printing operations. In this mode the system will evaluate the objects and look for alpha channel values or chroma key values that might not render properly if drawn directly to the printer and if found it will then flatten the image.

**Native Commands:** Draws the GDI+ commands directly to the printer's device context.

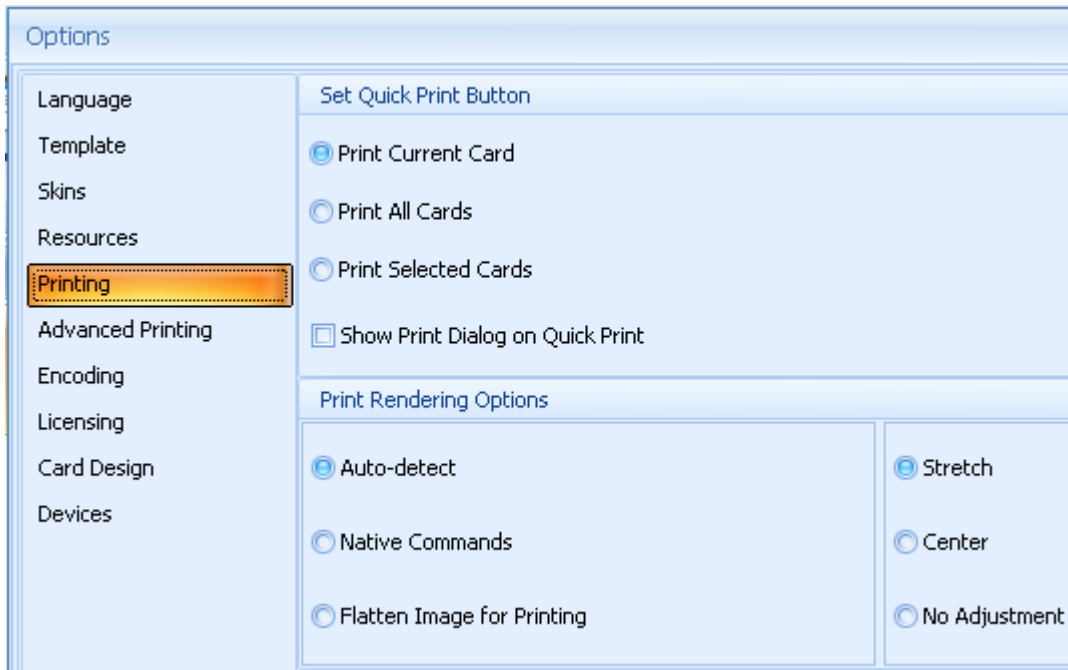
**Flatten Image for Printing:** Renders all the objects to a bitmap in memory and then sends down the bitmap to the printer.

The right side is the position that the image will be rendered to the printer. This is only applicable when the page size of the printer is larger than the card size, such as on our HDP series printers. On DTC printers, where the page size is equal to the card size, all 3 options will print the exact same.

**Stretch:** The background (if there is one) will be stretched to fill the page size (basically so our HDP printers will print edge to edge) while centering the other objects so that they should print where they are expected to on the card design.

**Center:** The background is not stretched and everything else is centered so that the objects are printed where it is expected in the card design. Many times this method won't quite print edge to edge.

**No adjustment:** All objects are rendered from the corner (which on the HDP printer is actually off the card). Basically "No Adjustment" will not try and compensate for the page size to card size discrepancy and will have the effect of shifting the entire card (on a portrait image) up and to the left.



## 7.6 Choosing Advanced Printing Settings

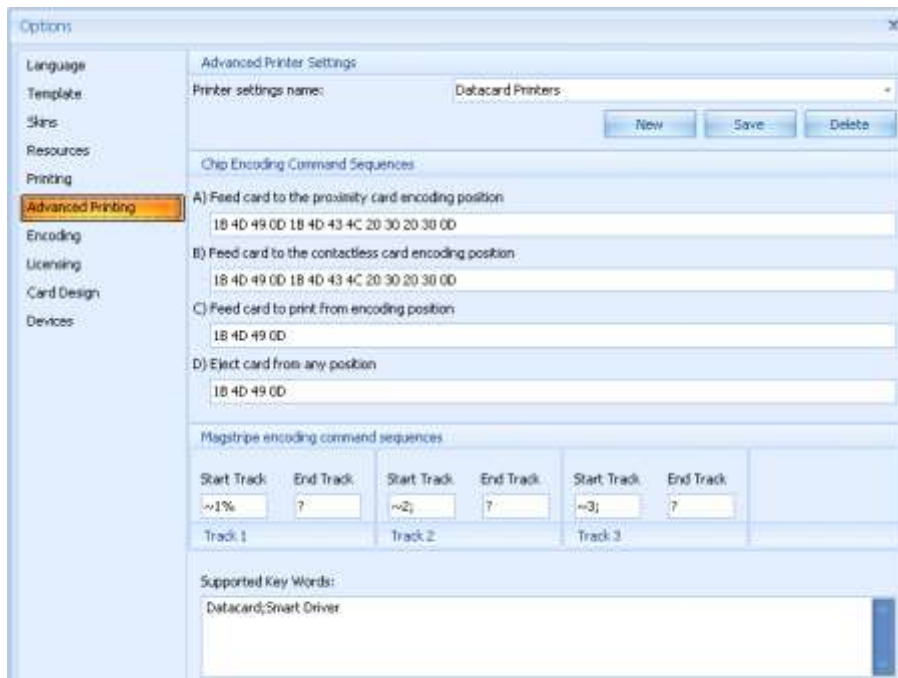
This dialog is used to configure the printer's chip encoding and magnetic encoding command sequences. Follow these instructions:

Input the appropriate Feed Card to Proximity Card Encoding position, Feed Card to Contactless Card Encoding position, Feed Card to Encoding position, and Eject Card from any position.

Set up the magnetic stripe Encoding commands.

Click on **Update Device List** to update the list (as needed).

Click **OK** to accept the option. Click on **Cancel** to exit without saving your work.



## 7.7 Selecting Encoding

Follow these instructions:

Under **Magnetic stripe**, select the printer used for an advanced encoding setting. (**Note:** Asure ID will try to find the best profile by matching the keywords. The magnetic stripe is similar to a barcode and encodes information from your existing data fields.)

iDIRECTOR/Smart Card Settings are used to configure the reader and port assignments.



New pic

## 7.8 Choosing Licensing Settings

This stores user information and license keys that will aid in troubleshooting and providing assistance if you forget or misplace your key. (**Note:** This must be done prior to using software or to convert from trial software to fully activated software.)

Follow these instructions:

Click Licensing to bring up the **Licensing** button and window.

Fill in the fields.

Check box for the option to Subscribe to product newsletter or anonymous surveys.

Click either Phone Activation or Activate Online.

Click **OK** when complete.

Options

Language  
Template  
Skins  
Resources  
Printing  
Advanced Printing  
Encoding  
**Licensing**  
Card Design  
Devices

**Activate License**

First Name:

Last Name:

Email:

Company Name:

State / Province:

Country:

License Key:

☐ Subscribe to product newsletter

☐ Subscribe to anonymous surveys

Phone Activation    Activate Online

**Asure ID**

System License: **None**

License Level: **Trial**

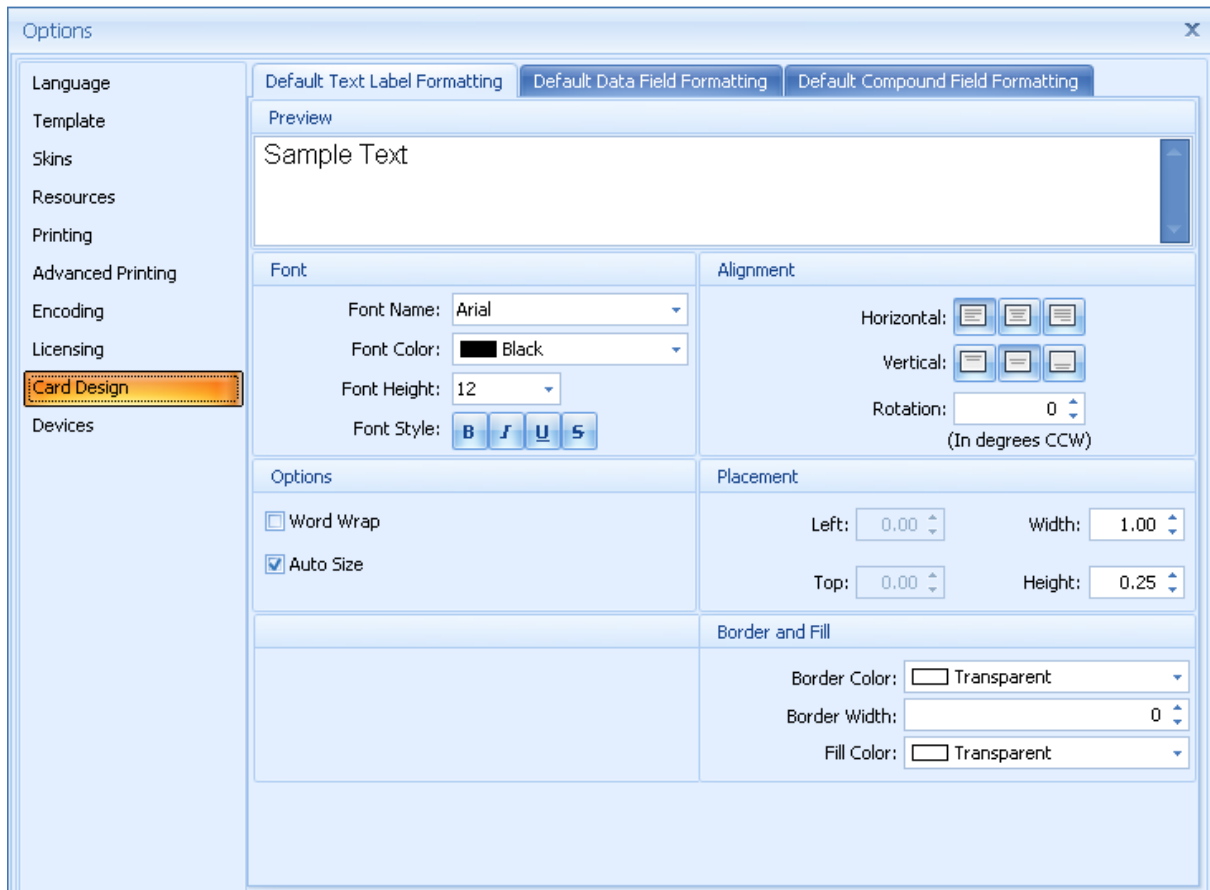
Additional Licenses:

## 7.9 Choosing the Card Design option

Use this option to set the default parameters for the Text Label, Data Field, and Compound Field formatting.

The options for Font, Alignment, Placement and Border/Fill will use these default settings in CARD DESIGN when TEXT LABEL, DATA FIELD AND COMPOUND FIELD are selected.

You can test the TEXT SAMPLE in the Preview box.



## 7.10 Choosing the Devices option

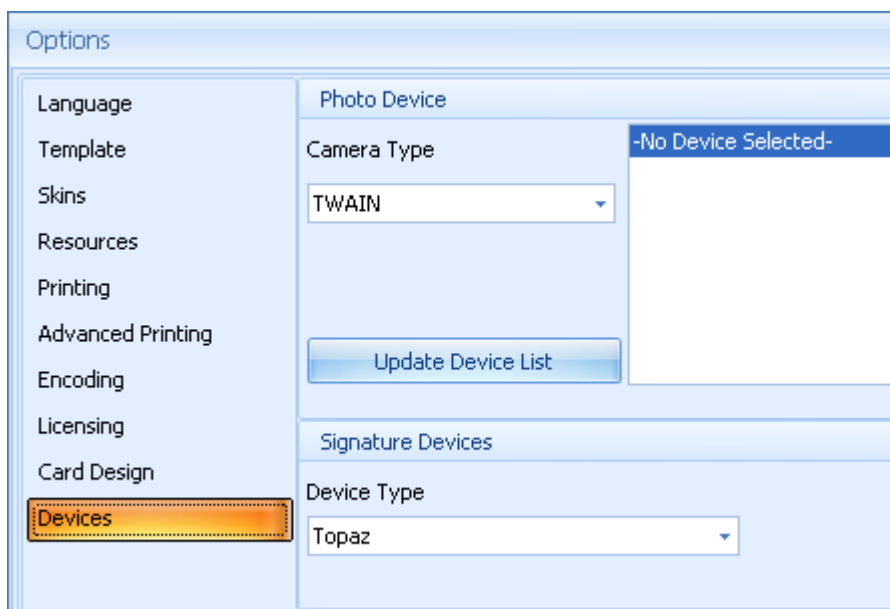
Use this section to set up your camera and/or signature pad devices. Follow these instructions after clicking the **Devices** button:

Select the **Camera Type** under Photo Device.

Click on **Update Device List** to update the list (as needed).

Select the **Device Type** option under Signature Devices, as shown below.

Click **OK** to accept the option. Click on **Cancel** to exit without saving your work.



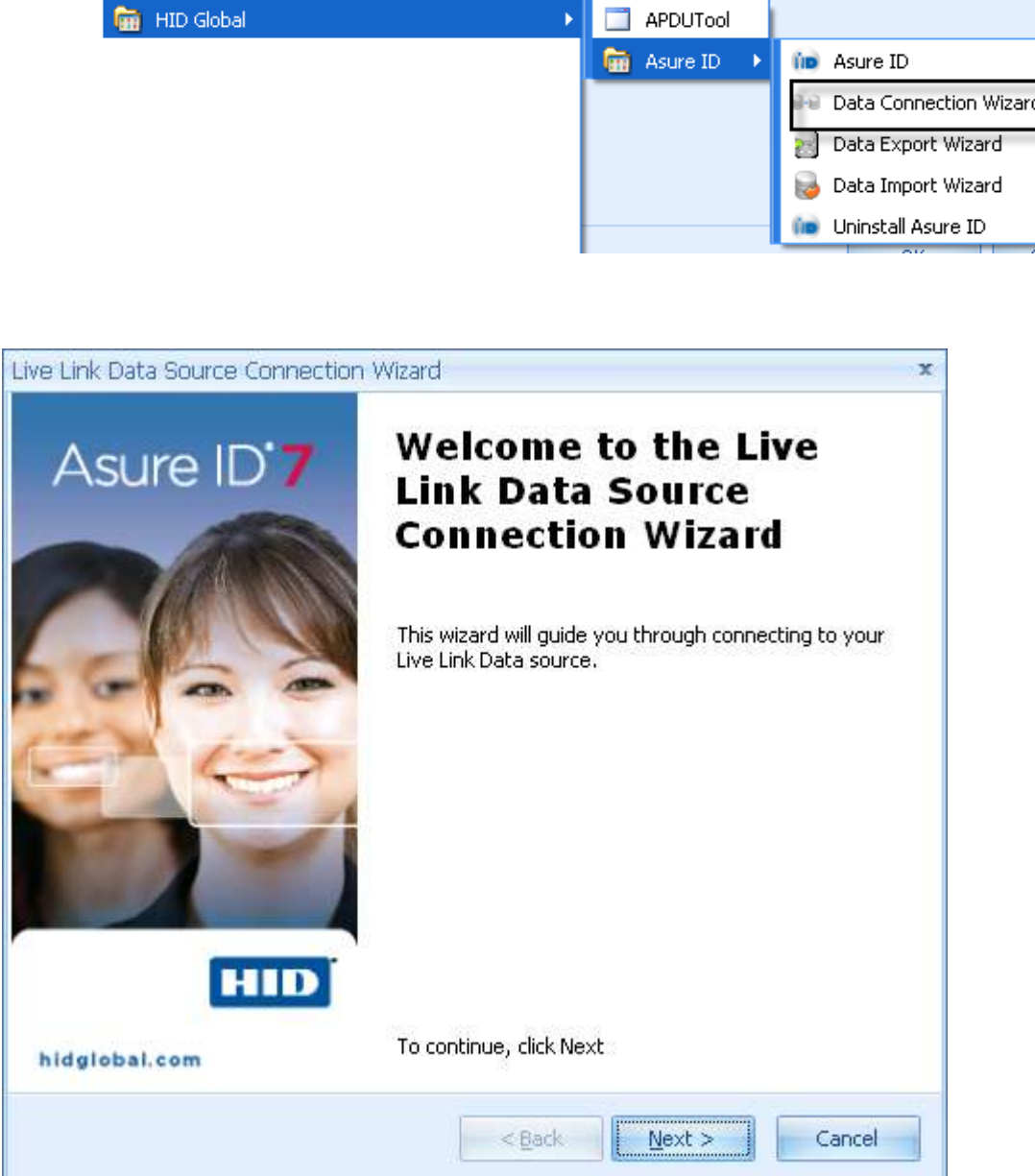
## Section 8: Data Connection

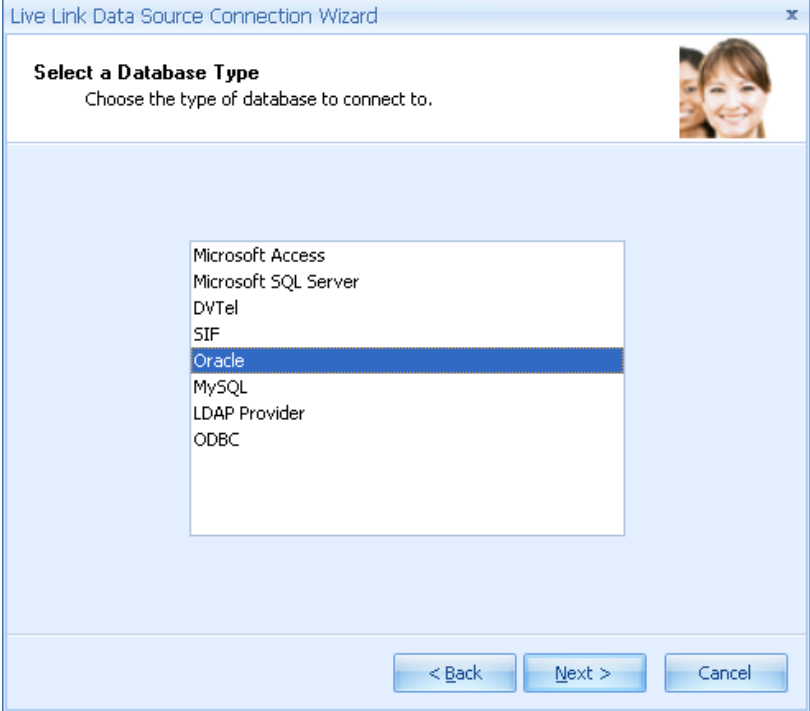
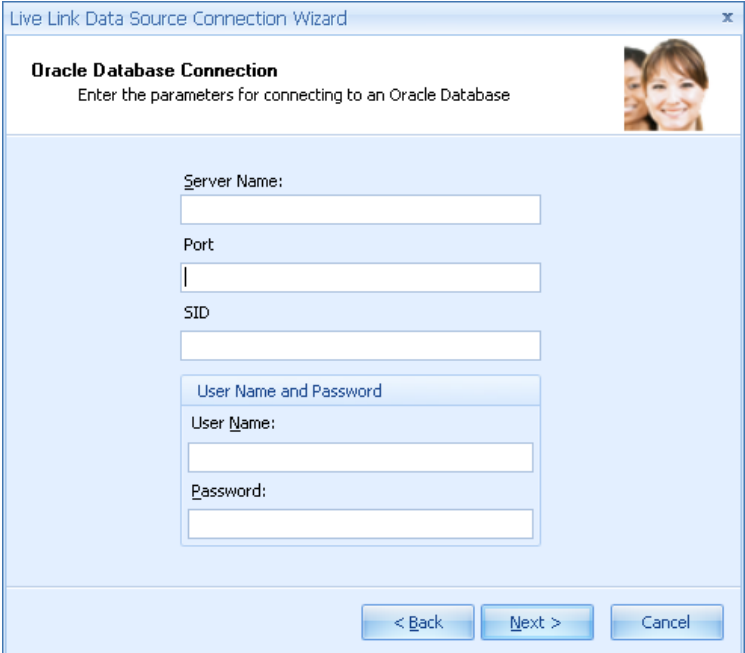
### 8.1 Creating a new Native Database (Access, SQL, and Oracle)


When Asure ID 7 is installed, it will use an Access database. This database stores some configuration tables, as well as template and cardholder data. If using SQL Server or Oracle as the native database, follow these steps.

Step	Procedure
1	Your system admin or dba will need to execute a set of scripts to create all the database objects needed for Asure ID 7. ( <b>Note:</b> The application needs to be pointed to the new database. If the database is not found you have the option to generate a new database by choosing the required path. With the next startup the new database will be accessed)
2	<p>To install the scripts:</p> <p>Go to the Asure ID installation directory (the default folder is <b>C:\Program Files\HID Global\Asure ID\Scripts</b> on 32-bit operating systems and <b>C:\Program Files (x86)\HID Global\Asure ID\Scripts</b> for 64-bit operating systems). You will find two files:</p> <p>AsureID_MSSQL.sql</p> <p>AsureID_Oracle.sql</p> <p>The Admin authority will need to run whichever set of scripts is applicable in the chosen database.</p> <p>They will also need to create a user that has SELECT, INSERT, UPDATE, DELETE and CREATE privileges.</p>
3	<p>Once objects are created in the database, access the following:</p> <p>[start]</p> <p>[All Programs]</p> <p>[HID Global]</p> <p>[Asure ID]</p> <p>[Data Connection Wizard]</p>



	
4	Click <b>Next</b> .
5	Select the correct database. ( <b>Note:</b> Access is only listed so that in the event you want to re-point the system back to the Access database that was installed with the application. Any other Access databases are not a valid option for a native datasource.)

		
6	<p>Enter the parameters needed to connect to the newly created database.</p> <p>This is where the user/password will be needed and is the user that will connect with all Asure ID users. (<b>Note:</b> In other words, they will only need one database user/password.)</p> <p>ALL users added to Asure ID 7 will use this user/password when working in Asure ID 7. (<b>Note:</b> This will not be visible to Asure ID users.)</p> 	

7	<p>This information now resides in the PC registry and will remain persistent (unless it is changed using the Data Connection Wizard).</p> <p>Re-pointing the database does not migrate data. (<b>Note:</b> This will need to be done manually.)</p> <p>Now any new templates added in Asure ID 7 will be saved in the new datasource. (<b>Note:</b> The Access database installed with the system will no longer be used.)</p> <p>When using Asure ID 7 for the first time after making this change, the only valid user will be the “admin” user.</p> 
8	<p>Click <b>Finish</b>. This will test connection and show message.</p>

# Appendix A- Data Entry Keyboard Shortcuts

## Data Entry Keyboard Shortcut List for Asure ID 7

<CTRL> + A	Select All
<CTRL> + <SHIFT> + A	Deselect All
<CTRL> + C	Copy to Clipboard
<CTRL> + F	Find
<CTRL> + H	Replace
<CTRL> + I	Capture Photo
<CTRL> + L	Load Photo from File
<CTRL> + O	Open Template
<CTRL> + P	Print Card
<CTRL> + Q	Quick Filter
<CTRL> + R	Set View to Record View
<CTRL> + S	Save Record
<CTRL> + T	Set View to Table View
<CTRL> + V	Paste from Clipboard
<CTRL> + X	Cut to Clipboard
<CTRL> + <Delete>	Delete Record
<CTRL> + <Insert>	Add Record
<CTRL> + <Space>	Toggle Select
<CTRL> + <F2>	Open Preview
<CTRL> + <F11>	Switch to Template View Mode
<CTRL> + <F12>	Switch to DataView Mode
<ALT> + <F4>	Exit Application
<F3>	Find Next
<F5>	Refresh Database

## Appendix B – Card Design Keyboard Shortcuts

### Card Design Keyboard Shortcut List for Asure ID 7

<CTRL> + A	Select All
<CTRL> + C	Copy to Clipboard
<CTRL> + N	Show New Template Dialog Box
<CTRL> + H	Replace
<CTRL> + O	Open Template
<CTRL> + P	Print Template
<CTRL> + S	Save Template
<CTRL> + T	Toggle Preview Mode
<CTRL> + V	Paste from Clipboard
<CTRL> + W	Close Template
<CTRL> + X	Cut to Clipboard
<CTRL> + Y	Redo
<CTRL> + Z	Undo
<CTRL> + <F2>	Open Preview
<ALT> + <F4>	Exit Application

## Appendix C- iCLASS Programming Guide

### Creating an iCLASS Card

The purpose of this procedure is to program and personalize an HID iCLASS card with HID's Physical Access application. Required for this procedure are:

Configured iCLASS Credentials

iCLASS Programming Platform Encoder (SDI) installed within a Fargo HDP 5000 Printer

iCLASS Programming Platform Smart Card (SAM) containing a specific facility code and the number of credential credits purchased

The iCLASS Programming Platform Smart Card (SAM) enables access to the HID Access Control Application on the iCLASS card. It does not enable applications to be written to any other areas within the iCLASS card.

Fargo HDP 5000 or HDPii Printer

Asure ID 7+ Card Personalization Software (Exchange Edition)

In order to use the iCLASS Programming Platform, the system should meet the same minimum requirements as stated by Asure ID.

An external OMNIKEY contact reader (3121, 5321 or 5325 USB)

Configured, non-programmed iCLASS Credentials: Please order these cards through your normal order process.

The programming information is added to the card through the use of this product.

The iCLASS Programming Platform utilizes configured but non-programmed cards as its base.

iCLASS Programming Platform Encoder (SDI) installed within a Fargo HDP Printer. Please verify if you already have an HDP 5000 printer. If yes, then just order the appropriate encoder upgrade module off the iCLASS Programming Platform order guide. If you do not have a HDP 5000 printer then please order the printer with the encoder already installed. Please contact your HID sales manager for the appropriate part numbers.

Please Note: The iCLASS Programming Platform Encoder can only be used to prepare an iCLASS card for usage by completing the programming of PAGE 0. This encoder cannot be used to add application data to other pages of the iCLASS card. Another encoder must be used to add applications to an iCLASS or MiFare card.

iCLASS Programming Platform Smart Card (SAM) containing a specific facility code and the number of credential credits purchased

The Smart Card enables access to the HID Access Control Application on the iCLASS card. It does not enable applications to be written to any other areas within the iCLASS card.

#### Asure ID 7+ Card Personalization Software (Exchange Edition)

In order to use the iCLASS Programming Platform, the system should meet the same minimum requirements as stated by Asure ID.

An external OMNIKEY contact reader (3121, 5321 or 5325 USB)

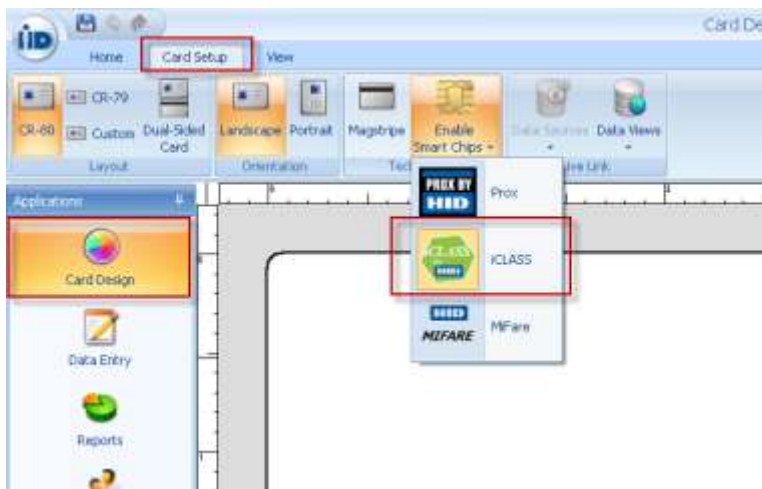
## Creating a template in Card Design

Make sure the SAM card is inserted into an external OMNIKEY contact reader (3121, 5321 or 5325 USB)

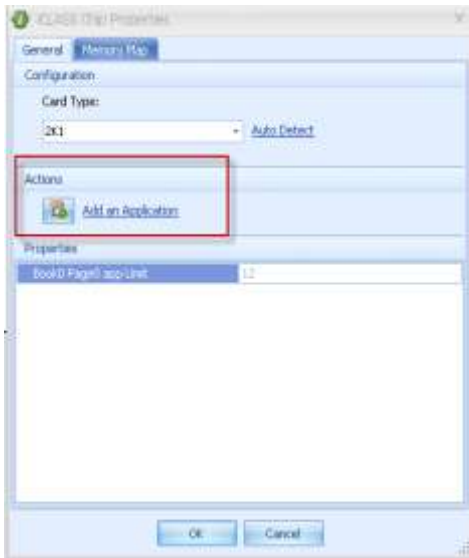
Access the Card Design Center application in order to create a new template or open an existing template for use with the SAM write capability.

Add the iCLASS Smart Chip to the template

From Card Setup tab, select Enable Smart Chips and select iCLASS from the dropdown list.



- 4) The iCLASS Chip Properties dialog is displayed.
- 5) From the Actions group in the iCLASS Chip Properties dialog, select Add an Application.

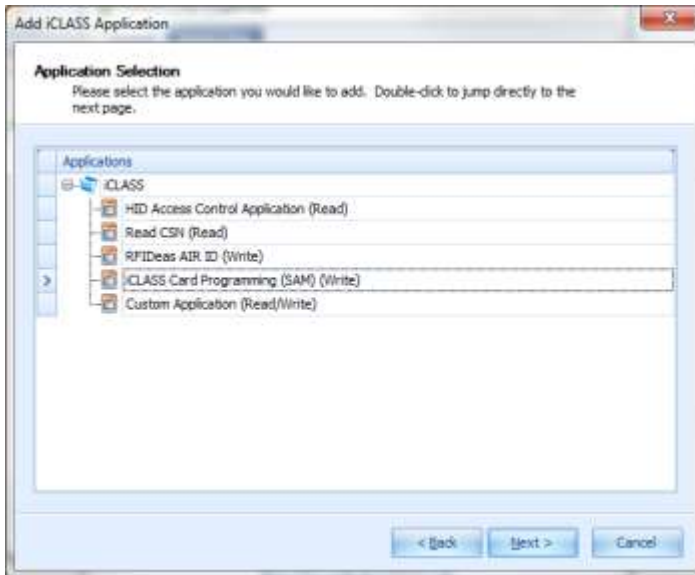


- 6) An iDIRECTOR wizard will open. Select **Next**
  - a. Using the new application called **iCLASS Card Programming (SAM)**, you can specify that the SAM will program the card once the card is encoded.

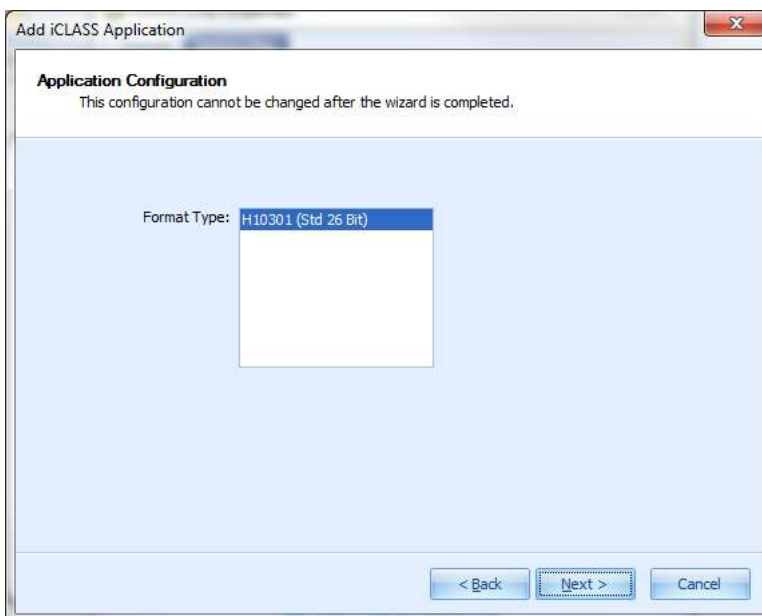
This option will only be available if a SAM card is inserted into a supported external contact chip reader at the time the application is added.

- 7) Select iCLASS Card Programming (SAM), and press the **Next** button.





8) On the Application Configuration page, only one format will be listed (the configuration supported by the SAM). Make sure it is selected and press the **Next** button.



9) On the Application Properties page press the **Next** button.

The screenshot shows the 'Add iCLASS Application' dialog box with the 'Application Properties' tab selected. The dialog has a title bar with a close button (X). Below the title bar, the text 'Application Properties' is followed by 'View or modify the applications properties.' Below this is a table with various application properties.

SAM UID	58-01-13-51-27-17-C2-12-48-18-FF-FF
SAM Version	25
Number of Available Credentials	100
Number of Credentials Left	96
Number of Credentials Used	4
Sales Order Number	12345678
Time Out	0
Expect Configured Card	<input checked="" type="checkbox"/>
Require New Password	<input type="checkbox"/>
Initial Card Number	10
Card Number Field ID	1
Encrypt Password	<input checked="" type="checkbox"/>

At the bottom of the dialog are three buttons: '< Back', 'Next >', and 'Cancel'.

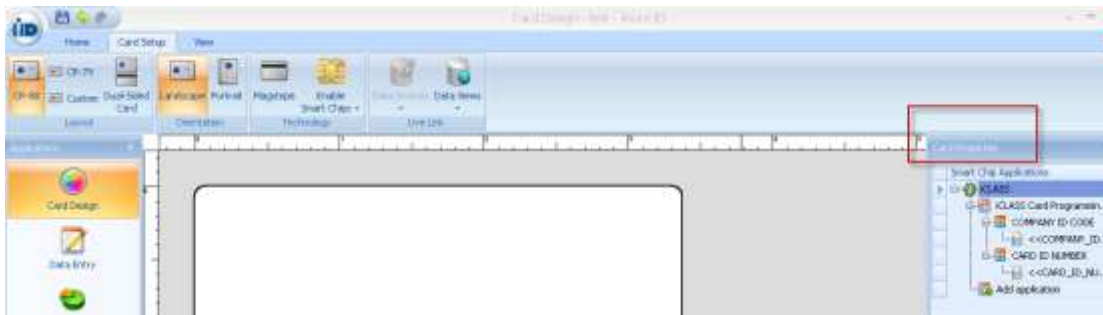
10) Verify the “Create a Data Field for each iDIRECTOR field” box is checked and press the **FINISH** button.

The screenshot shows the 'Add iCLASS Application' dialog box with the 'Application Added' tab selected. The dialog has a title bar with a close button (X). On the left side, there is a graphic with the text 'Asure ID 7' and a photo of two smiling women. Below the photo is the HID logo and the website 'hidglobal.com'. The main area of the dialog contains the text 'Application Added' followed by 'You have successfully added an application to the card technology.' Below this is a checked checkbox with the label 'Create a Data Field for each iDIRECTOR Field'. At the bottom, there is a message 'To complete this operation, click Finish' and three buttons: '< Back', 'Finish', and 'Cancel'.

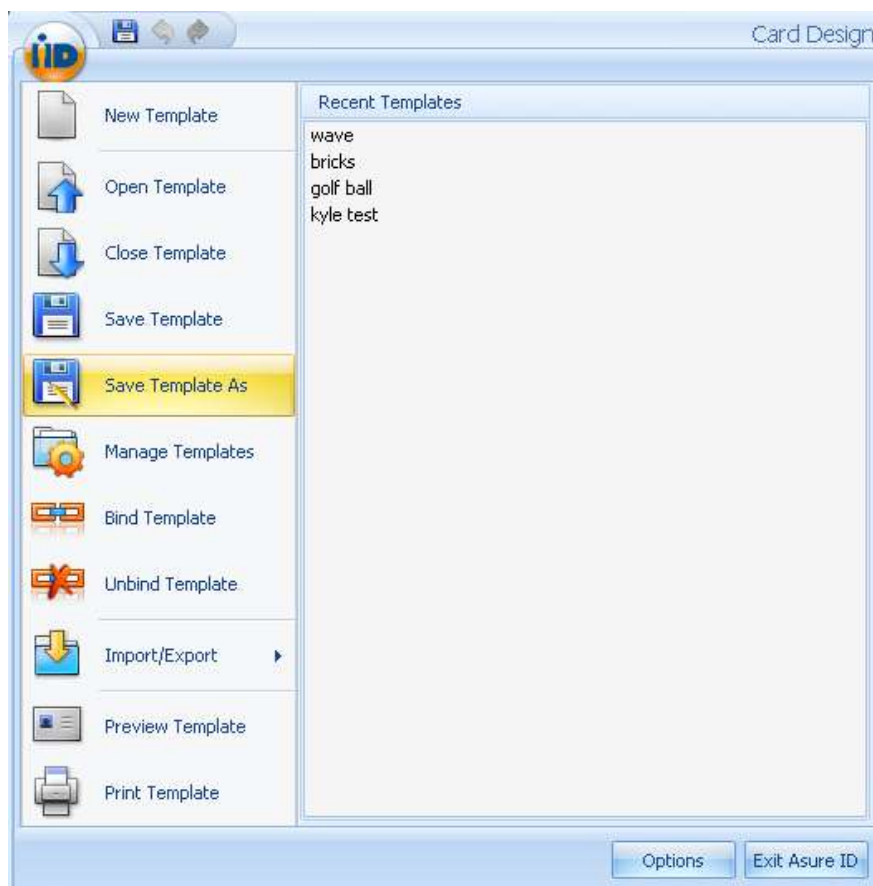
11) At this point the application has been added and will appear as a new tab in the iCLASS Chip Properties dialog. Press **OK** to confirm the change.



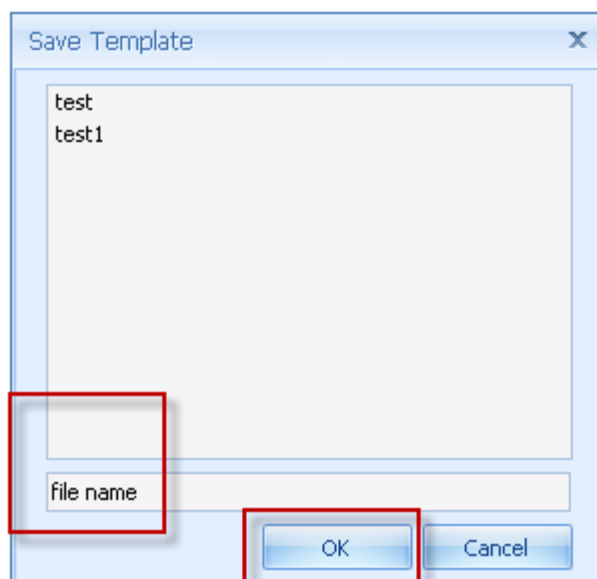
12) Once added, the iCLASS SAM application becomes visible in the Card Properties window on the iDIRECTOR tab in the Smart Chip Applications tree.



Make any changes or updates to the template and then **SAVE** the template



Name the file and select OK

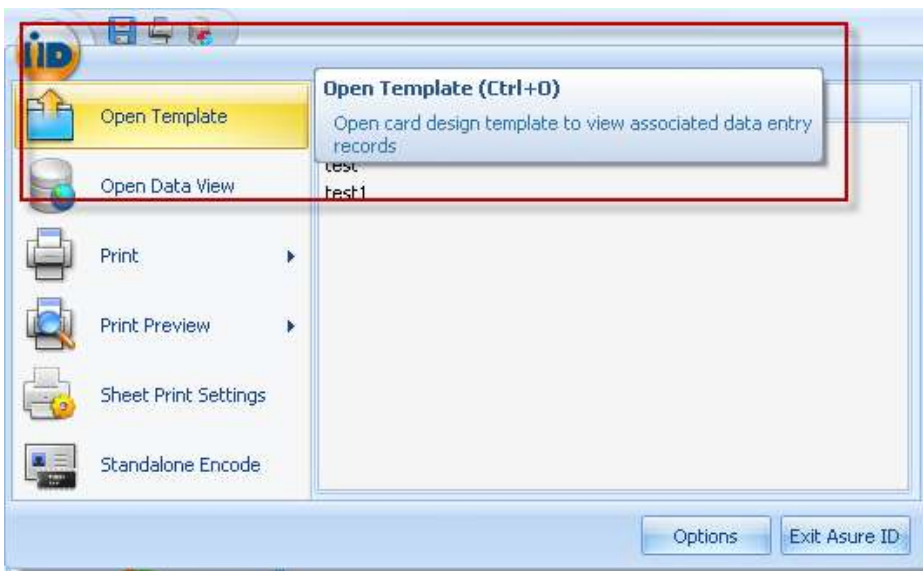


## Encoding iCLASS cards using the SAM in Data Entry

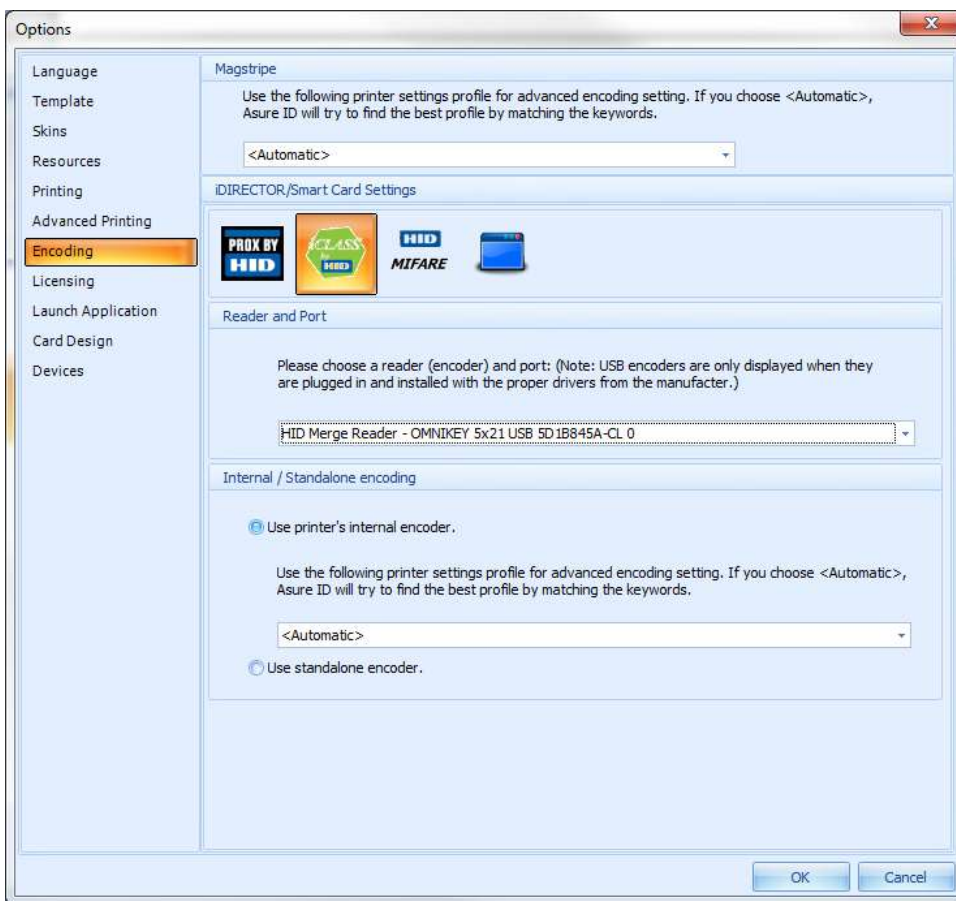
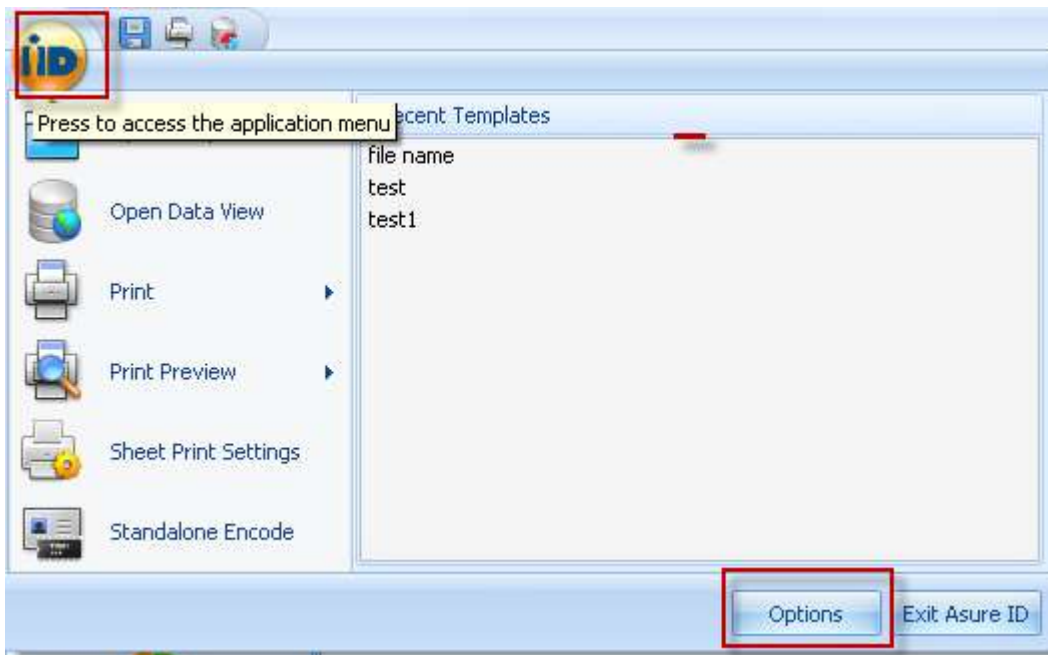
Select the ID icon to access the OPEN TEMPLATE and OPTIONS.



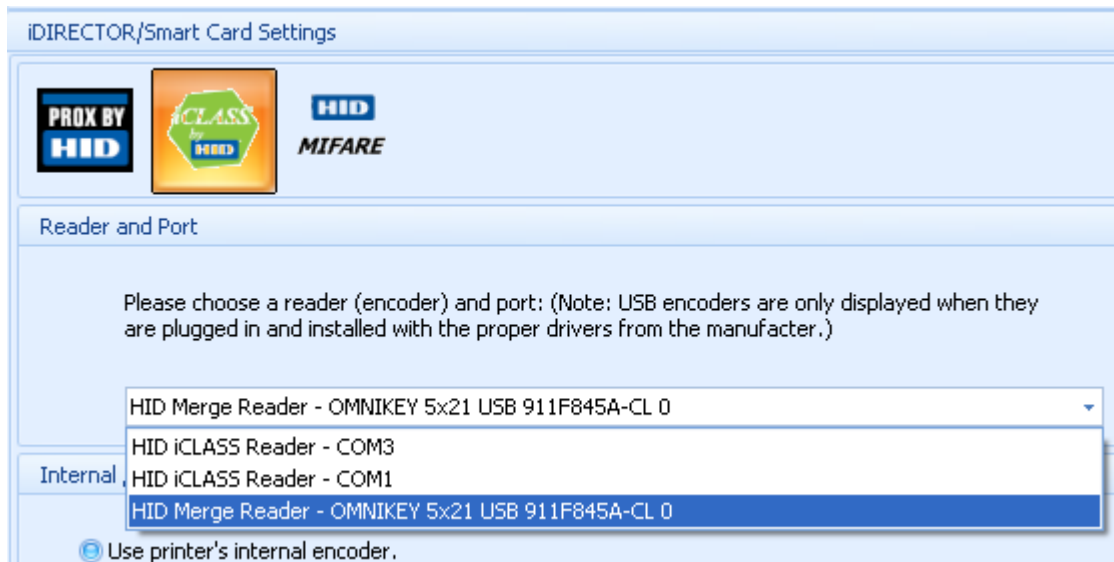
From the ID icon- open the template created in the previous section.



From the ID icon open the **Options** dialog and select the **Encoding** tab.



Select the iCLASS icon and choose an **HID iCLASS Programming Platform Reader** from the Reader and Port section.



Make sure the **Use printer's internal encoder** option is selected.

Press **OK** to confirm the Reader and Port selection and **exit** the dialog.

An additional setting may need to be modified in the Asure ID database. (EncodeDelay entry to the Asure ID HDP 5000 printer table).

Contact HID Technical Support for questions and assistance configuring the Asure ID database for your specific printer model.

Add records and data field values in Data Entry. (Note: In addition to the template data fields, the parameters (required for the iCLASS credentials) are shown in this view.)



(Add single or batch records)

If the parameter is User Configurable, as determined by the SAM order parameters, the field is enabled and the value can be entered in Data Entry.

**SAM Status and Password Change**

**SAM Data**

Card Status: **Connected**

Unique ID: 5B-01-13-51-27-17-C2-12-48-18-FF-4

Format Type: H10301 (Std 26 Bit)

Version: 0.25

Available Credentials: 10

Number of Credentials Used: 0

Sales Order Number: 123456

Expects Configured Card: Yes

**Actions**

[Change SAM Password](#)

[Refresh](#)

**Order Parameters**

Parameter	User Configurable	Value
> Facility Code	No	9
Card Id Number	Yes	-

OK

*SAM Status dialog showing SAM card with User Configurable Card Id Number*

If the parameter is not User Configurable, the field will be indicated as Read Only. (**NULL**)  
Check the **SELECT** box for each record to encode.

**Template Record 5 of 5**

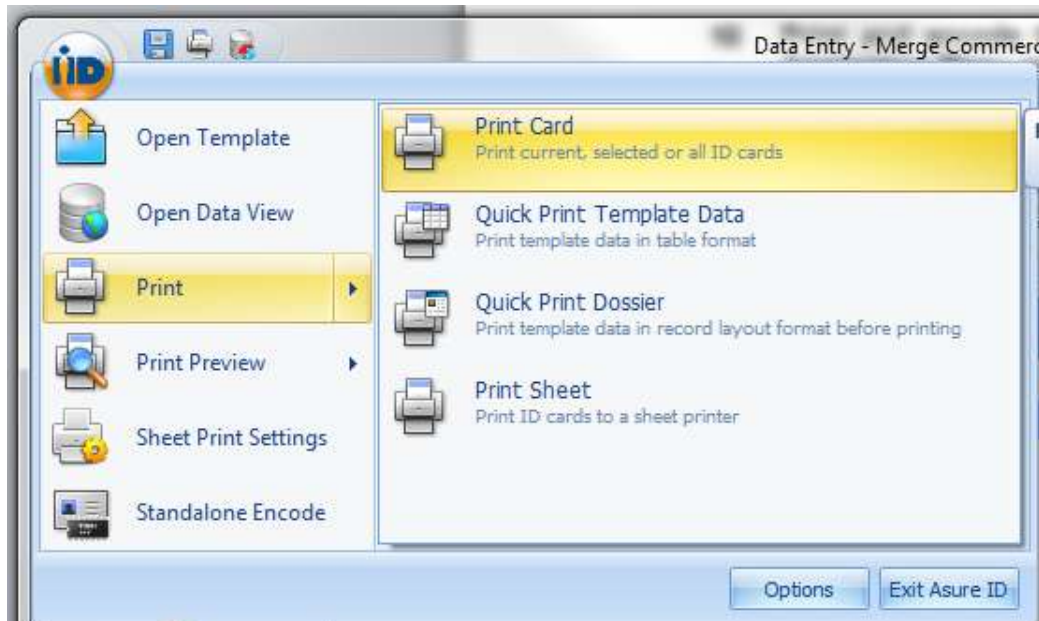
Select: ☒

COMPANY\_ID\_CODE: <NULL>

CARD\_ID\_NUMBER: <NULL>



Print and encode the selected card(s) with the Print option from the Application Menu.



The first time the SAM is used it still contains the default (factory) password from HID. In this case you are prompted to change the SAM password.

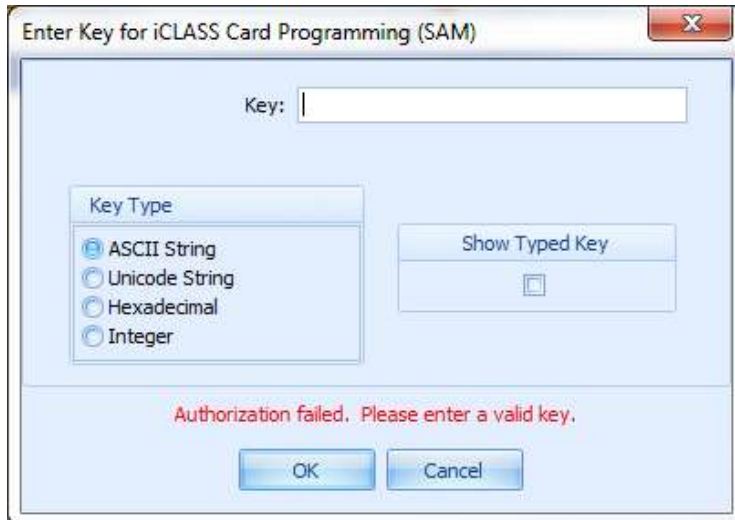


The Old Password field will be disabled and does not need to be entered.

Enter your unique password in the **New Password** and **Confirm New Password** fields.  
(Note: If these fields are left blank, the default (factory) password will be retained and you will not be prompted to enter the password prior to printing/encoding.)

Press the **OK** button to accept the password change. (Note: Alternatively, the password can be changed from SAM Status on the View tab in both Card Design and Data Entry.)

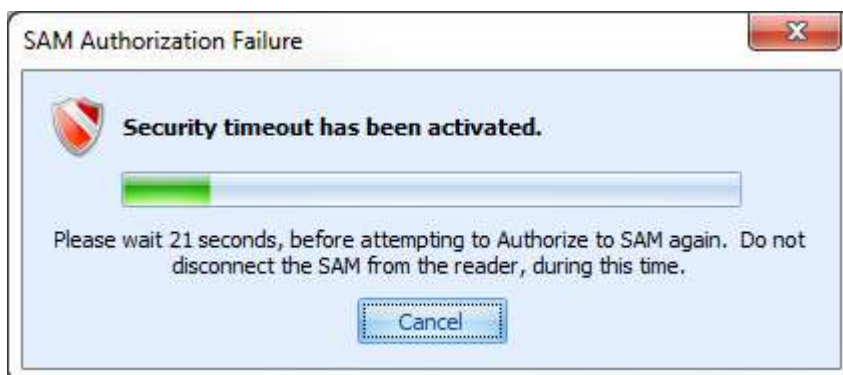
You will be asked for the SAM password when a card is encoded in a Data Entry session.



Enter the SAM password. ( Note: **KEY** box for password entry)

Press **OK**. (Note: The password will be cached, and it will not be required again during this session of Data Entry.)

If the password is entered incorrectly, the SAM will be “locked” for several seconds. (Note: Each subsequent invalid authentication attempt will add additional locking time.)



A progress bar indicating the Status of the printing and/or encoding process is displayed.



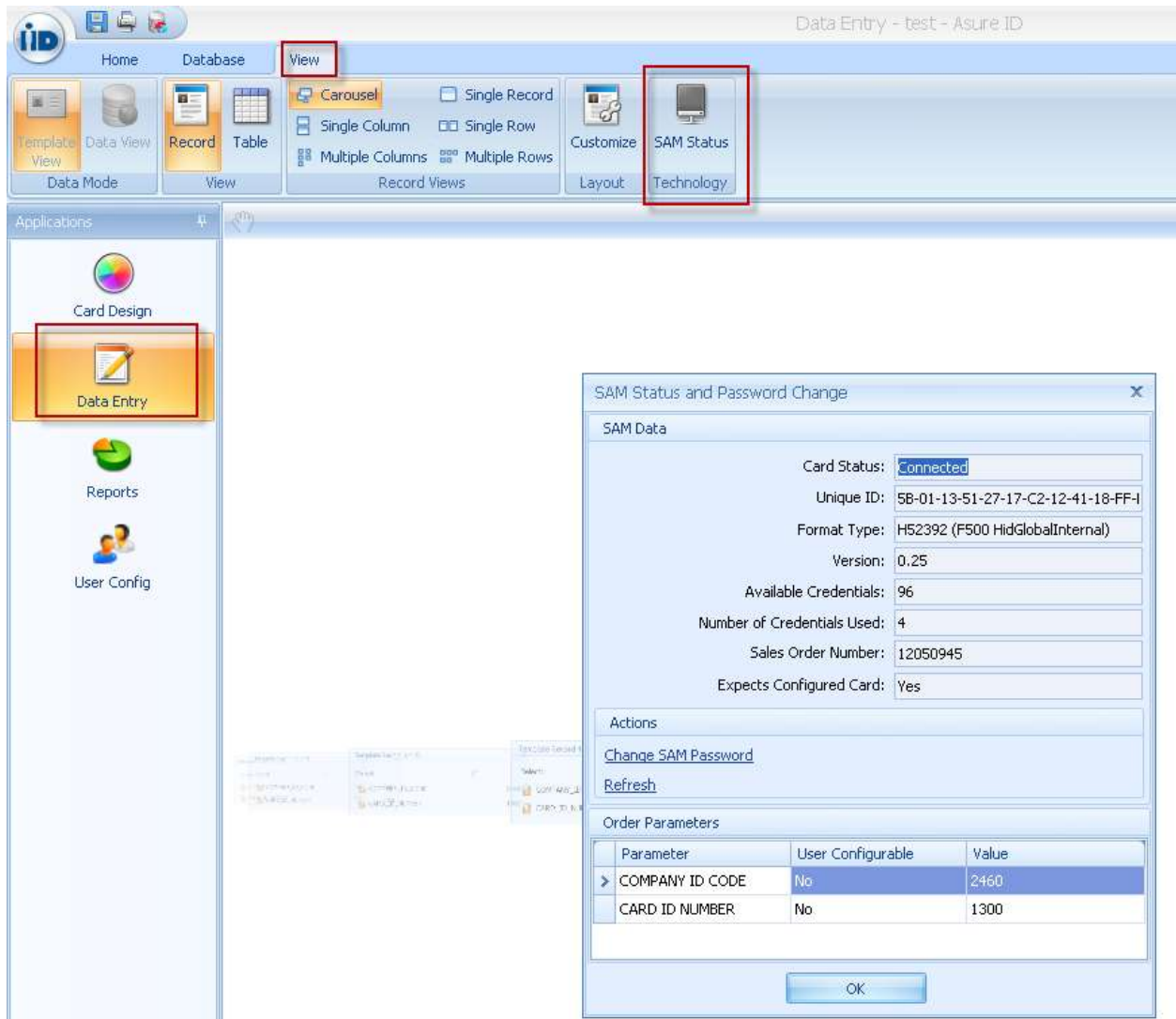
An error message will be displayed if there was an error during the printing and/or encoding process.

(Note: If the card fails to encode the card, the card must be ejected from the printer before the process is started over again.)



## SAM Status

From the View tab in either Card Design or Data Entry, select SAM Status button to view the current SAM data. Note: The SAM card contains the credential information (iCLASS keys and format) purchased from HID.



**Card Status:** Indicates if the SAM card is connected with the contact reader and communicating with Asure ID.

**Unique ID:** Represents a 12 byte field that will be displayed in a hexadecimal format (e.g., 1A-2B-3C-4D).

**Format Type:** Indicates the encoding algorithm used to encode the iCLASS card.

**Version:** version of the SAM card

**Available Credentials:** Indicates how many of the purchased credentials are still available to encode iCLASS cards.

When there are no available credentials, the SAM card can no longer be used to encode iCLASS cards.

A new SAM must be purchased from HID.

**Number of Credentials Used:** Indicates how many of the purchased credentials have already been used to encode iCLASS cards.

Sales Order Number: HID sales order

Expects Configured card: Entry is Yes or No

**Change SAM Password button:** Allows the SAM password to be modified. The SAM comes with a default password from HID that is the same for all SAM cards purchased.

The user is prompted to change this default password to a more secure password the first time a SAM is used to print/encode a card in Data Entry.

**Refresh button:** Reads the SAM and updates the dialog with the current information contained on the SAM

**SAM Status and Password Change**

**SAM Data**

Card Status: Connected

Unique ID: 5B-01-13-51-27-17-C2-12-48-18-FF-4

Format Type: H10301 (Std 26 Bit)

Version: 0.25

Available Credentials: 96

Number of Credentials Used: 4

Sales Order Number: 12345678

Expects Configured Card: Yes

**Actions**

[Change SAM Password](#)

[Refresh](#)

**Order Parameters**

Parameter	User Configurable	Value
> Facility Code	No	9
Card Id Number	No	10

OK

The **Order Parameters** section indicates all fields that will be written to the iCLASS card.

**Parameter column:** Displays the iDIRECTOR field name.

**User Configurable column:** Indicates Yes if you can enter values for the parameter in Data Entry or No if the parameter is Read Only.

**Value:** Indicates the Read Only value that will be written to the card. (Note: The parameters and their configurable status are managed in the SAM order process with HID.)

The value for a User Configurable parameter is entered into Data Entry prior to the print/encode operation.



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