HID

15370 Barranca Parkway
Irvine, CA 92618

FARGO®
Asure ID 7.4

Trademarks

HID GLOBAL, HID, the HID logo, FARGO, Asure ID, are the trademarks or registered trademarks of HID Global Corporation or its licensors in the U.S. and other countries.

Other trademarks and registered trademarks are the property of their respective owner.

Trademark Acknowledgments

Other trademarks and trade names may be used in this document to refer to either entities claiming the marks and names or their products.

Document History

Revision Control Number	Date	Document Title
Revision 1.9	June 2013	HID Global Asure ID 7.4 Software Application User Guide (Rev. 1.9) Addition: Language Support
Revision 1.8	August 2012	HID Global Asure ID 7.3 Software Application User Guide (Rev. 1.8) Addition: Laser Engraver Interface for HDP8500 Card Printer
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

Contacts

North America

15370 Barranca Parkway,
Irvine, CA 92618,
USA

866 607-7339, #6

M-F 7am-6pm CST

Europe, Middle East and Africa

Phoenix Road,
Haverhill, Suffolk CB9 7AE,
England

+44 1440 711 822

M-F 8:30 - 17:30 GMT
(17:00 Friday)

Asia Pacific

19/F 625 King's Road,
North Point, Island East,
Hong Kong

+852 3160 9833

M-F 9am – 6pm GMT +8

Brazil

Av Guido Caloi 1985 Prédio 18
São Paulo – SP,
CEP: 05802-140

55 11 5514-7110

M-F 9am – 6pm ATC

support.hidglobal.com
www.hidglobal.com

Table of Contents

1   Getting Started

1.1   Installation

Your license key is located on the back of the CD package.

The set-up procedure may take several moments to complete.

Step	Procedure
1	Insert the Asure ID CD and follow the instructions or download the software from the HID Global webpage, www.hidglobal.com/AsureID. **Asure ID 7** **Install Asure ID** **View User's Guide** **Browse Omnikey Drivers** Browse to the **Setup.exe** file if the CD does not run automatically.
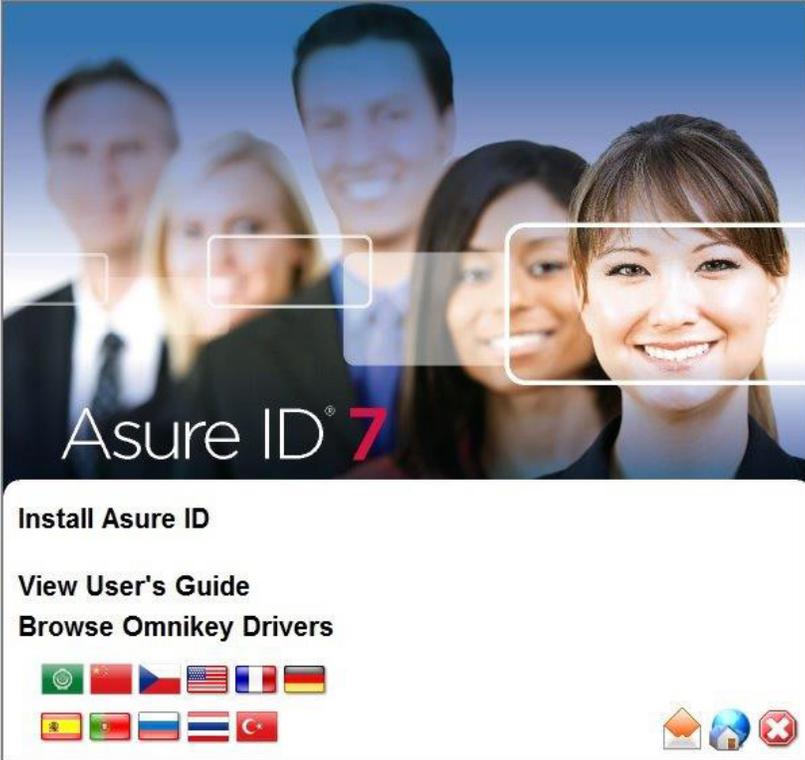
Step	Procedure
2	Click **Install Asure ID** and select your language. Click **Next** to continue. The Asure ID – InstallAware Wizard guides you through the installation. Follow the on-screen instructions. **Asure ID** **Welcome to Asure ID Setup** The InstallAware Wizard will install Asure ID on this computer. Please select an installation language and click Next to continue. English Next > Cancel
3	**Read** the License Agreement and click **I accept the license agreement.** Click **Next** to continue. **Asure ID** **License Agreement** • Collecting information • Preparing installation • Installing • Finalizing installation Please review the license agreement below. **HID GLOBAL CORPORATION END-USER LICENSE AGREEMENT** **FOR** **AsureID™ SOFTWARE** HID GLOBAL CORPORATION ("HID") IS WILLING TO LICENSE TO YOU AS AN INDIVIDUAL OR THE LEGAL ENTITY (REFERENCED BELOW AS "YOU" OR "YOUR") THAT WILL BE UTILIZING THE LICENSED SOFTWARE (AS DEFINED IN SECTION 1 BELOW) FOR YOUR USE, SUBJECT TO YOUR ACCEPTANCE OF ALL OF THE TERMS AND ◉ I accept the license agreement ○ I reject the license agreement < Back Next > Cancel
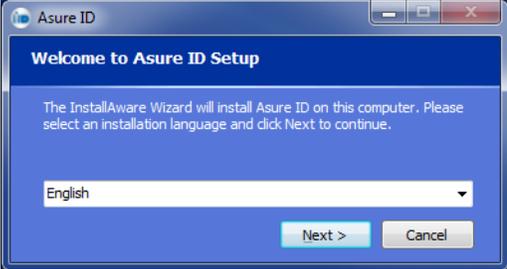
Step	Procedure
4	Select a path to the destination for the software installation. Click **Next** to continue through the installation process. Follow on-screen instructions.

Step	Procedure
5	When installation is complete, Asure ID allows you to perform the following installation options: 1. **Activate Asure ID** – If you have a license key available you can activate the Asure ID software upon installation. If you don't then Asure ID will be installed in trial mode and will remain active for 30 days. 2. **Select Alternate Native Data Source –** Select this if you would like to configure the native data source which stores card templates and Asure ID system information. By default Asure ID will set the native source to an embedded MS Access data source. **Helpful Hint:** We recommend configuring this for installations where Asure ID will be used on multiple PC's and all template and reporting information needs to be consistent. 3. **Enable Asure ID to Automatically Check for Updates** – This allows the Asure ID software to notify you of product updates that can be applied Click **Finish** to run the selected installation options. ![Asure ID Setup Complete window showing Asure ID has been installed successfully. Installation steps: Collecting information, Preparing installation, Installing, Finalizing installation. Installation Options: Activate Asure ID (unchecked), Configure Native Data Source (unchecked), Automatically check for updates (checked), Run Asure ID (checked). NOTE: The User ID and Password to use on first use is "admin". Finish > button.]

Step	Procedure
6	If **Activate Asure ID** was selected, Asure ID will prompt you to enter your user information and the license key. The license key is located on the back of the CD case. Click **Phone Activation** or **Activate Online**.
8	If you selected **Select Alternative Native Data Source**, Asure ID will walk you through the Data Connection Wizard to complete this process. For details on this please refer to section 9 of this user guide.
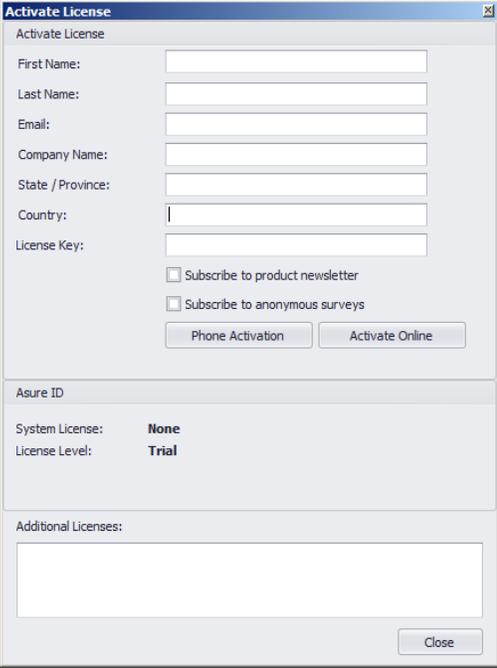
1.2   Initial Login

Step	Procedure
1	Open Asure ID 7 by double-clicking the Asure ID 7 icon. If the software has not been activated the **Activation Required** dialog displays. For users that have already activated their software, proceed to step 5.
2	Click **Activate**. The Activate License screen displays. **Helpful Hint:** For a Trial version, click **Continue**. **Activation Required** **Activation Required** Activation is required to use this product. Once a license has been activated on a computer, it cannot be used on another computer. By Activating this license you will lock it to the current computer. To start the activation process, click on the Activate button. To continue using this product during the trial period, select a version below and click on the continue button. **Version:** Exchange **Trial Period** Days Left: 30 Activate Continue
3	To activate the software refer to step 9 and 10 in the installation section of the user guide – sect. 1.1.
4	For Asure ID Express editions and above, enter **admin** (lower case) for both the User ID and Password to log onto the software. **Login** User ID: admin Password: •••• Starting Application: Card Design OK Cancel **Helpful Hint:** Asure ID Solo users are not required to enter a **User ID** or **Password**.
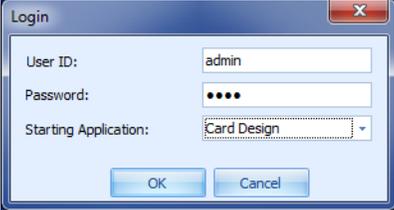
2 Introduction to Asure ID Software

2.1 Product Overview

Asure ID 7 includes a full line of card personalization applications that are simple to learn. They are loaded with useful features and are flexible enough to improve the issuance and management of basic-to-advanced photo ID credentials for virtually any size or type of enterprise. Asure ID 7 is available in the following editions for new and existing installations.

	Solo	Express	Enterprise	Exchange	Developers Edition	Developers Exchange Edition
General						
Operating System Supported: Windows® 8 / 7 / Vista / XP, including Windows 8 Pro Tablets	x	x	x	x	x	x
Language Support (Arabic, Czech, English, French, German, Indonesian, Portuguese (Brazil), Russian, Simplified Chinese, Spanish, Thai, Turkish	x	x	x	x	x	x
Microsoft® Access® (2000 and 2003)	Native	Native, Live Link	Native, Live Link	Native, Live Link		
Password Log-on with definable user privileges		x	x	x		
Microsoft® SQL Server® (2000, 2005, 2008)			Native, Live Link	Native, Live Link		
DVTEL®			x	x		
Networkable[6]			x	x		
MySQL® (version 5)				Live Link		
Oracle® (9i and 11g)				Native, Live Link		
Mircrosoft Active Directory / LDAP				x		
Card Design						
Dual-sided Template Designs	x	x	x	x	x	x
Add Text Field (Variable, Static)	x	x	x	x	x	x
Add Photo Fields	x	x	x	x	x	x
Import Images (such as, logos and graphics)	x	x	x	x	x	x
Add a Linear Barcode	x	x	x	x	x	x
Add Magnetic Stripe	x	x	x	x	x	x
Fluorescing Panel (F-Panel) Support	x	x	x	x	x	x

|	Solo	Express	Enterprise	Exchange	Developers Edition	Developers Exchange Edition
Various Card Sizes	CR-80 Only	x	x	x	x	x
Add Data Fields	8	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
Add Compound Data Field		x	x	x	x	x
Add Signatures		x	x	x	x	x
Add 2D Barcodes (PDF417, QR Code and Datastripe)		x	x	x	x	x
Set Conditional Design and Print Rules		x	x	x	x	x
Smart Card Encoding and Management (iDIRECTOR®)[1]				x		x
Add Laser Engraved Text, Data and Photo Fields						x^2
Data Entry						
Integrated Photo Capture (TWAIN, DirectShow® & WIA	x	x	x	x	x	x
Save and Search Records	200	x^3	Unlimited	Unlimited		
Global Find		x	x	x		
Integrated Signature Capture		x	x	x		x
Batch Printing		x	x	x		x
Sheet Printing		x	x	x		
Reports (Standard and Custom)		x	x	x		
Export Reports		x	x	x		
ODBC Import/Export		Import	x	x		
Live Link (Real-time data exchange)[4]		Single DB, Single Table	Single DB, Multi-Table	Multi-DB, Multi-Table		
SIF (Student Interoperability Framework) Agent			Optional[5]	Optional[5]		
Educational import/ export (Student Photo CD)[5]			Optional[5]	Optional[5]		
Asure ID Protect Plans						
Free Updates	x	x	x	x	x	x
Annual/multi-year support packages	Optional	Optional	Optional	Optional	Upon Request	Upon Request

(1) Manage and control card access formats, smart cards and card applications.
(2) Available when used with FARGO HDP8500LE.
(3) Storage limitations based on MS Access.
(4) Bi-directional data exchange with third party databases and applications.
(5) Available as a purchasable add-on option.
(6) Asure ID site license enable sharing of networked database information on multiple workstations

2.2 Navigation within Asure ID

If you have used the latest version of Microsoft® Office, the Asure ID user interface seems familiar. Asure ID is based on the Microsoft Ribbon. Tab-driven navigation with convenient tools and fly-out control palettes make Asure ID an efficient tool.

High Level Workflow:

1. Asure ID enables you to create a card template for each card type (for example, employee card, contractor or student).
Helpful Hint: Individual cards are not printed from the Card Design application. Printing typically occurs in the Data Entry application.
2. After a card template is complete, you change from the Card Design module to the Data Entry application so you can add, modify and delete card records. This stage includes acquiring photos through a webcam and printing selected cards.
3. The Reports application allows you to view standard reports (for example, user activity and template activity reports) and custom reports.
4. The User Config application enables you to manage user privileges and login credentials for editions of Express and above.
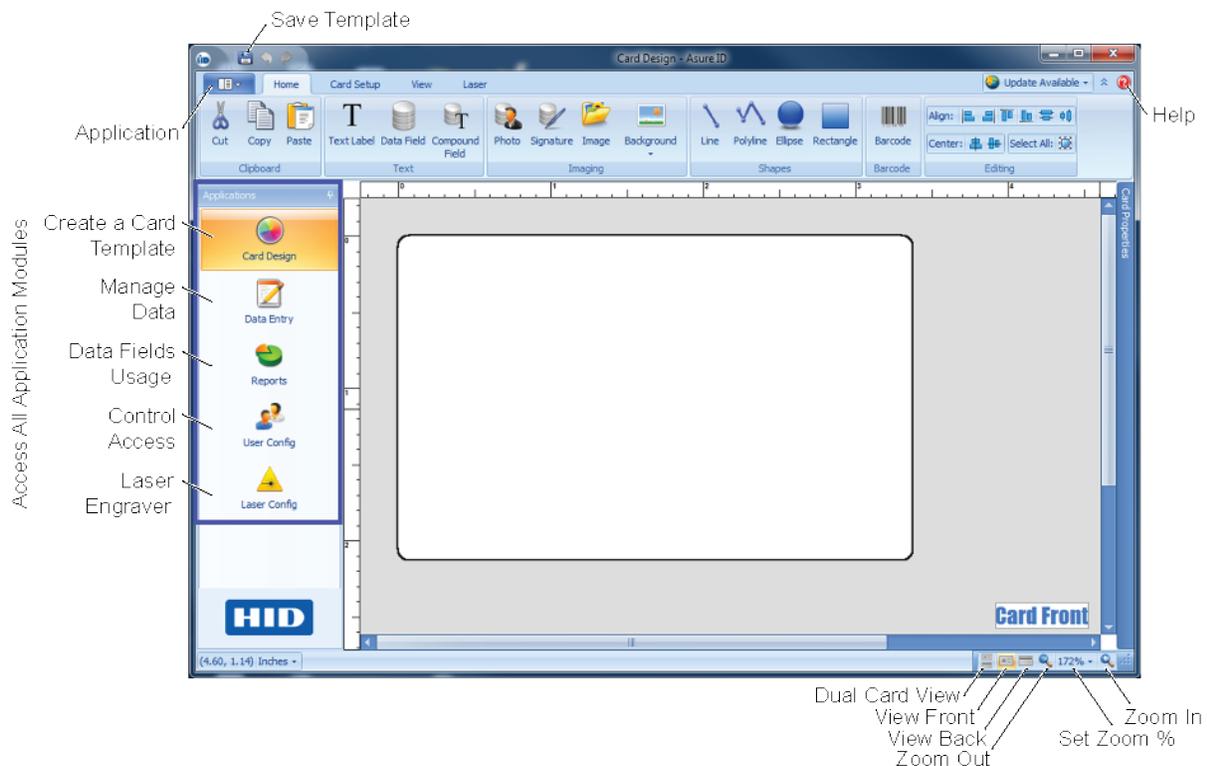
2.3   Asure ID Keyboard Shortcuts

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

3   Card Design

You can use the Card Design application to create the card layout for printing and encoding objects. **(Note:** Each card layout is saved as a template for use by the Data Entry application for enrollment and printing.)

Helpful Hints:

- The Asure ID Solo edition is limited to 200 records. (See **Product Overview** for a full list of features and capabilities for each edition.)

- The native database for Asure ID has a size limitation of 2GB when using MS Access, which is a limitation of MS Access. If you have large photo files, the database may reach its limitation and prevent the addition of records. Asure ID recommends that you store photos in a folder and use a photo field in your template, as illustrated below.
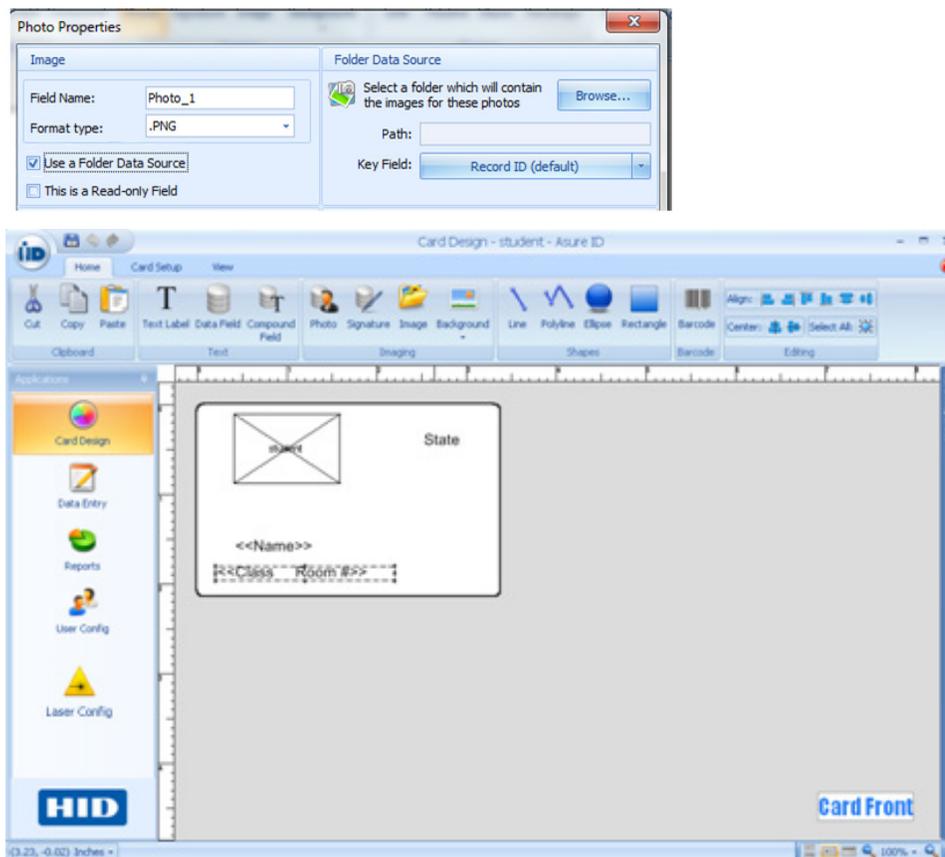
3.1   Card Design Area

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

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

- Layout and design a card template.
- Add technologies, including a 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.

3.2   Basic Card Design Tutorial

This tutorial walks you through the process of creating a basic ID card. Activities include the following.

- Card design area
- Text labels to illustrate the company name
- Image for the organization's logo
- Data fields for record information, such as employee name or number
- Photo field

Additional capabilities, such as data sources connected with Live Link or smart card creation with iDIRECTOR, are discussed in the Advanced Card Tutorial in section 3.3.

3.2.1   Design a Basic Card

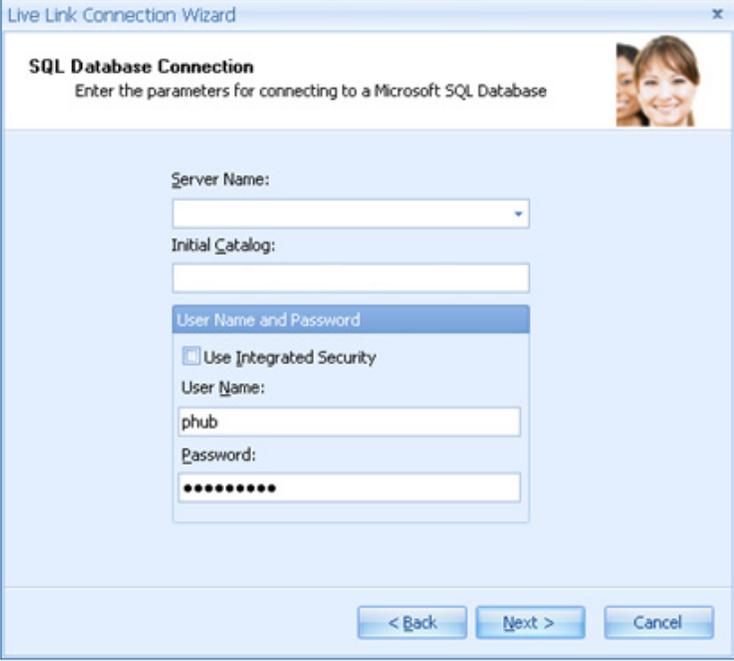| Step	Procedure
1	Click the **Application** icon [icon] and select **New Template**. Select **Create New Template** and **Single Sided CR-80**. • Select CR-80 for Card Size. • Select the **Portrait** (vertical) button for Orientation. • Click **OK**. If using a printer without a magnetic stripe encoder, select **None** for the **Magstripe Properties** selection.
2	Click **Background** and select **Add Background**. Select a default background or click **Browse…** to choose your own background. Click **OK**.
3	From the **Text** group, click **Text Label.** Click the card design area. The **Text Label Properties** window displays. Enter your text, such as **ABC Electronics, Inc**. Change the Font, Color, Height and Style, as preferred. Click **OK**. Position the item on the card design area.

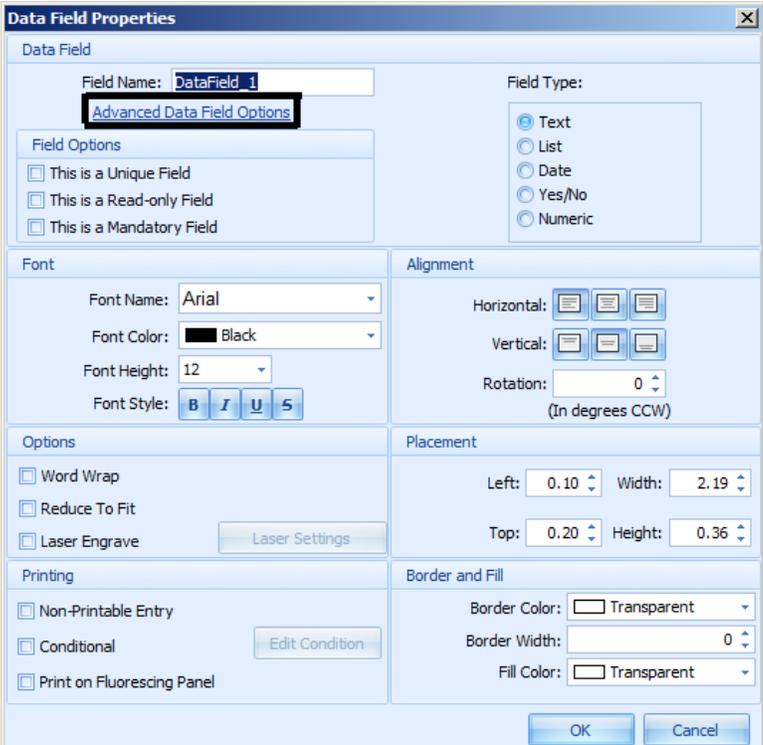| Step	Procedure
4	From the **Imaging** group, click **Image**. Click the background image. In the **Image Properties** dialog, click **Load new Image from File**. A standard **Browse** dialog displays. Click **Browse** and select the image file. Click **Open**. Click **OK**. Position the image precisely on the card design area.
5	From the Imaging group, select **Photo**. Click the card design area. Within the **Image Properties** dialog, change the **Border Color** and **Border Width**, as preferred. Click **OK**. Position the photo precisely on the card design area.
6	From the **Text** group, select **Data Field** to add unique data fields to the card record, such as Employee Name. Click the card design area. The **Data Field Properties** dialog displays. Enter **First Name** in **Field Name**. Select **Text** in **Field Type**. Change the **Font** properties as preferred. Select **Reduce to Fit** or adjust the size to the correct dimensions from **Option**. Click **Advanced Data Field Options** from **Data Field.** Set **Max Characters** to **25**. Click **OK** to close the dialog. Click **OK** to close **Data Field Properties**. Position the text field precisely on the card design area. **Helpful Hints:** • If you would like a default value to appear in the text field if nothing is entered (such as N/A), enter a default **First Name** into the **Default Value** field. • Select **This is a Mandatory Field** from **Field Options** to ensure that a user adds the field to the card record when in **Data Entry**.
7	From the **Text** group, select **Data Field** to add another unique data field to the card record (i.e. employee number). Click the card design area. The **Data Field Properties** dialog displays. Enter the **Employee Number** from **Field Name**. Select **Numeric** as the **Field Type**. Make any changes to the **Font** properties. Select **Reduce to Fit** in **Options**. Click **Advanced Data Field Options**. Set **Max Characters** to **5**. Click **OK** to close the dialog. Click **OK** to close **Data Field Properties**. Position the item precisely on the card design area.
8	Click the **Save** icon, 💾 or press **Ctrl + S** to save your work. Name the file and click **OK**.

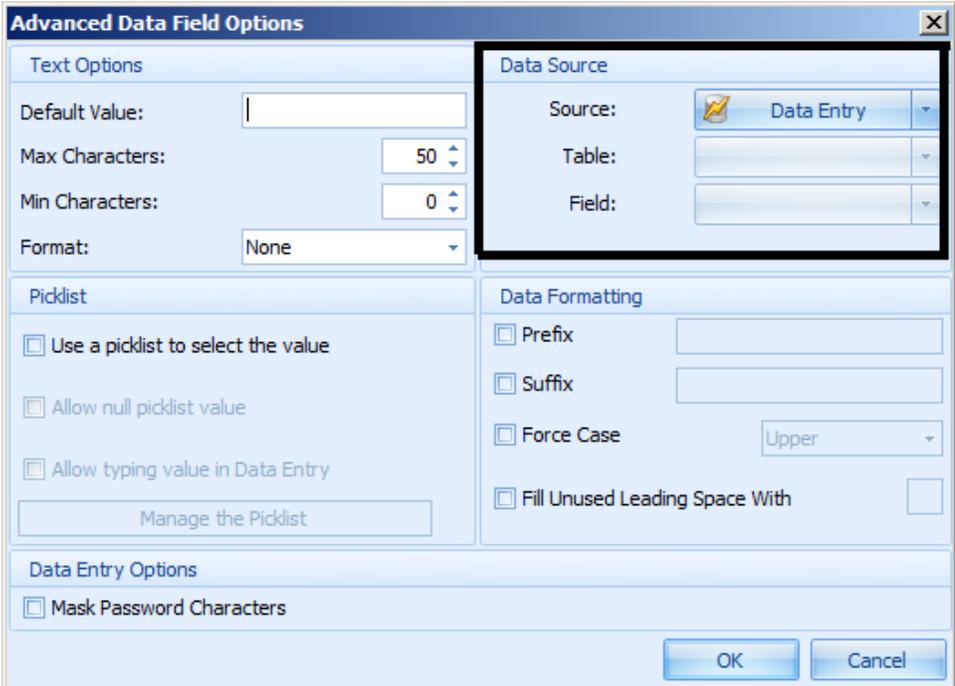## 3.3   Advanced Card Design Tutorial

This tutorial walks you through the design of an advanced ID card template that links to a networked database through Live Link for record information. The design also manages smart cards through iDIRECTOR in a single in-line personalization process within a card printer.
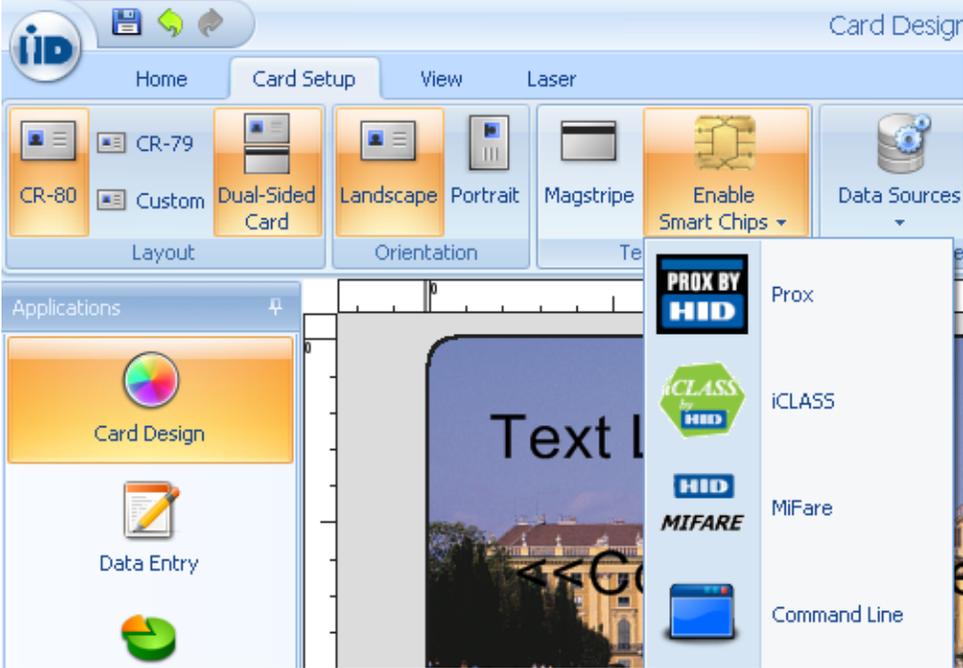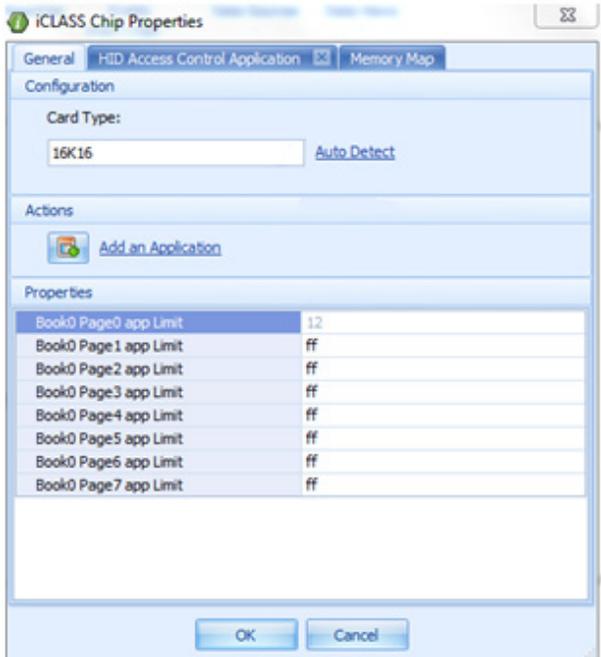
3.3.1   Design an Advanced Card Template

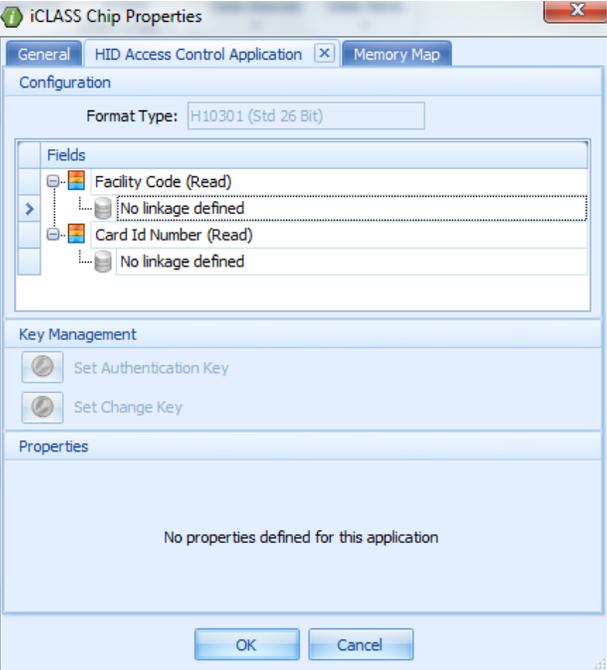| Step	Procedure
1	Ensure a network database exists and all database information is available. Information for Live Link includes the following. • Acquire connection string parameters for Live Link from the Database Administrator • Database userID / password Users may have Select, Update, Insert and/or Delete privileges. The Administrator assigns the user Asure ID privileges to manage data integrity. In every Live Link connection, users have access to the objects assigned. Security is managed within the database and not within Asure ID.
2	Decide to retrieve data records from a local database or store the Asure ID system information in a centrally networked location. The following combinations are possible: • A single data source is associated with the template. The source can be a native database or a Live Link table. • One Live Link table is the primary data source with a secondary native database. • Multiple Live Link tables and/or data sources are edit only. You cannot add or delete data. • Multiple Live Link tables and/or data sources are editable. You can add, append and delete fields using the native database application. **(Note:** The DVTel solution allows for adds (new records), edits and deletes. You can delete a record without removing the data, but the transaction changes the status of the cardholder. Do not use other data sources with DVTel, including the native database.) **(Note:** LDAP retrieval is read-only and cannot be used with any other data source, including native database.)
3	Click **Card Setup**. Click **Data Sources**. Select **Add a Data Source**. The **Live Link Data Source Connection** wizard displays. Click **Next**.
4	Select the appropriate database type from the list. Follow the on-screen instructions from the **Live Link** wizard to set up the connection to the database.
5	In this example, we link to a Microsoft® SQL Server database. For information on connecting to additional data sources, see Import/Export the Asure ID Advanced User Guide (English only).

Step	Procedure
6	When using Microsoft® SQL Server, you must have the following entries: • **Server Name** – **I**ndicates the SQLServer database name. • **Initial Catalog** – Enter the Initial Catalog if you do not have a default database. This field may be empty. (Optional) • **User Name** – This is the username defined by the Database Administrator. • **Password** – This is the password associated with the username. Live Link Connection Wizard **x** **SQL Database Connection** Enter the parameters for connecting to a Microsoft SQL Database Server Name: [▼] Initial Catalog: [ ] User Name and Password ☐ Use Integrated Security User Name: [phub] Password: [•••••••••] [< Back] [Next >] [Cancel]
7	When the database is connected, address two more dialogs, as necessary: • **Default Table** – Displays automatically whenever you map data from the dropdown box. When set the table is saved. • **Primary Table** – **I**s the driver for data retrieved, regardless of the number of additional data sources and tables. The primary table is overridden with each additional data source. When **<None>** is selected, the native database becomes primary. Click **Next**.
8	Click **Test** to verify the connection is successful. Click **Finish**.
9	From the **Text** group, select **Data Field**. Click the card design area. The **Data Field Properties** dialog displays. Within **Field Name**, type the word or friendly name that you intend to link in the connected database.

Step	Procedure
10	Click **Advanced Data Field Options** to access the LiveLink capability**.**

Step	Procedure
11	Select the **Source**, **Table** and **Field** entries to link the data field to the networked data source.
12	The data field is now linked to a networked data source. If you would like additional data fields or photos, refer to **Card Design**. Repeat Step 10 to link the new data fields or photos to the networked data source.
13	Inline Smart Card Personalization with iDIRECTOR enables you to read the HID Access Control Information from a smart card (iCLASS, MIFARE, and/or Prox) and save this to a data source of your choosing. **Helpful Hint:** Ensure that a data field exists in the external data source where you would like to store the card number from the card being personalized.

Step	Procedure
14	With an external data source setup properly, click on **Enable Smart Chips** under the **Card Setup** tab within the **Card Design** module. Select the appropriate card technology that you would like to read/write. For this example, we read the HID Access Control Application information and store the Card ID number into an external data source.

Step	Procedure
15	Manually select the card type, if you know it. Otherwise, use the Auto Detect feature to automatically detect the card type. iCLASS Chip Properties General HID Access Control Application Memory Map Configuration Card Type: 16K16 Auto Detect Actions Add an Application Properties Book0 Page0 app Limit 12 Book0 Page1 app Limit ff Book0 Page2 app Limit ff Book0 Page3 app Limit ff Book0 Page4 app Limit ff Book0 Page5 app Limit ff Book0 Page6 app Limit ff Book0 Page7 app Limit ff OK Cancel
16	With the card type selected click the Add Application link to open the iDIRECTOR Wizard, which will walk you through the process of reading/writing information from the card. In this example, we read the **HID Access Control Application** information.
17	To read the HID Access Control Application information, iDIRECTOR must know what format the information is stored in. Select the format manually, if you know it, or click **Auto Detect**. Click **Next** to continue.
18	To read HID Access Control Application information and write it to an external data source, deselect the **Create a Data Field for each iDIRECTOR Field** checkbox. **Helpful Hint:** If you do not remove the check from the checkbox, Asure ID creates a data field for the Facility Code and Card ID Number to be stored within the Asure ID native source.

Step	Procedure
19	Within the application configuration tab, double-click the text underneath **Card ID Number** that states No Linkage Defined to link the Card ID Number to the external data source. iCLASS Chip Properties General	HID Access Control Application	Memory Map Configuration Format Type: H10301 (Std 26 Bit) Fields Facility Code (Read) No linkage defined Card Id Number (Read) No linkage defined Key Management Set Authentication Key Set Change Key Properties No properties defined for this application OK Cancel
20	Click **Create New Data**. Refer back to step 8 for how to properly link the data field within the external data source.
21	Duplicate this process link the Facility Code to an external data source. **Helpful Hint:** If you do not need to use the Facility Code, you can simply create a new data field that is not linked to the external data source. Asure ID stores this information in the native data source.
22	When both data fields are linked to the data source, click **OK** to complete the process for Inline Smart Card Personalization with iDIRECTOR. **(Note:** If the either the Facility Code or Card ID Number are not linked to any data fields Asure ID cannot complete the in-line personalization process at the time of issuance.)
23	For information on how to issue cards with Asure ID using the Data Entry module, proceed to Data Entry.

3.4 Card with a Barcode Data Field Tutorial

The purpose of this **Card Design** element is to create a barcode.

3.4.1 Design a Card with a Barcode

Step	Procedure
1	Select **Barcode** from the **Barcode** group.
2	Click the card design area. The **Barcode Properties** dialog displays.
3	Select the barcode type in the **Type** field under **Barcode**.
4	Click the pre-existing data field to link within **Available** or create a new field in **Select Fields**.
5	Click **Add>>**. The information entered within the data field during enrollment automatically populates the barcode.
6	Click **OK**.
7	Position the item precisely on the card design area.

3.5 Card with a Magnetic Stripe Tutorial

The purpose of this tutorial is to add magnetic encoded data to a card.

3.5.1 Design a Card with a Magnetic Stripe

Step	Procedure
1	Launch the Asure ID software.
2	Enter your userID and password in the entry fields.
3	Click **Card Design**.
4	Click **Card Setup** on the menu ribbon. Select the **Dual-Sided Card** icon in the **Layout** group.
5	Select **Magstripe** in the **Technology** group. The **Magstripe Properties** are set for **Type** (**ISO** or **Non-ISO** or **Custom**) and **Options**.
6	Drop data objects to the card design area based on the information to be encoded on the magnetic stripe. Designate the objects as non-printable within the **Properties** window of the object.
7	Select **Magstripe** in the **Technology** group to access Tracks 1, 2, and 3 (Properties).
8	Select fields to be added to each track of the magnetic stripe. The current field options are displayed in the **Available** box. Click **Add** to make the field active.
9	Click the **Save** icon 🖫. Name the file and click **OK** to close the **Save Template** dialog.

3.6 Card with a Compound Field Tutorial

The purpose of this card design is to enter a **Compound Field** at data entry. A compound data field is useful for when you would like multiple data fields to be aligned next to each other.

Helpful Hint: Use a compound data field to perfectly place a last name one space after the first name

3.6.1 Design a Card with a Compound Field

| Step	Procedure
1	Launch the Asure ID software.
2	Enter your userID and password in the appropriate areas.
3	Click the Application icon.
4	Select **New Template.**
5	Select the attributes for the new card. Click **OK**. The card design area displays the attributes of the card properties selected.
6	In the **Text** group, click **Compound Field.**
7	Drag-and-drop a data object onto the card design area. The **Compound Field Properties** dialog displays.
8	Designate a **Field Name** for the object.
9	Click **Insert Data field** to add data to the field through the next **Properties** display. An alternative method is to click **Insert existing data field** 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 **Compound Field** and designate the **Field Type**.
11	Select the **Data Source** as **Data Entry**, **Clone Data Source** or **Add a Live Link Data Source…**.
12	Specify additional property values or use the default values. The font properties for each field inside of the **Compound Field** can be set individually. Click **OK**.
13	Repeat Steps 11-12 until all fields within the **Compound Field** are set.
14	Specify any additional options for the compound field (as needed) or use default values.
15	Select **Print on Fluorescing Panel** if this data should be viewed only with ultra violet light.
16	Click the Save icon or press **Ctrl + S** to save your work. Name the file and click **OK**.

4   Data Entry

The **Data Entry** module enables you to populate the database created in **Card Design** with the appropriate data for the card and then print the designated cards.

4.1   Data Entry Window

Controls are organized into logical groups. Groups are organized onto tabs, as shown below: **Home, Database, View** and **Laser**.

With the Asure ID's **Data Entry**, you can:

- Add, delete, modify, and void card records.
- Capture or load photos and signatures.
- Quickly find card records with the Global Find and Quick Filter functionality.
- Archive, import and export card record data.
- Set record viewing options with the capability to rearrange layout for the most efficient data entry process.
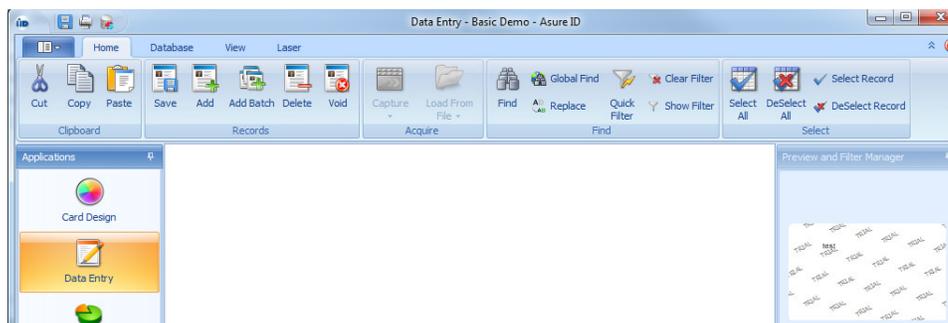
4.2   Sample Data Entry Workflow

The following section provides an overview of how to effectively manage and print card records within Asure ID. We start by adding a record with a photo and printing the cards.

4.2.1   Add and Print a Record with Data and Photo Fields

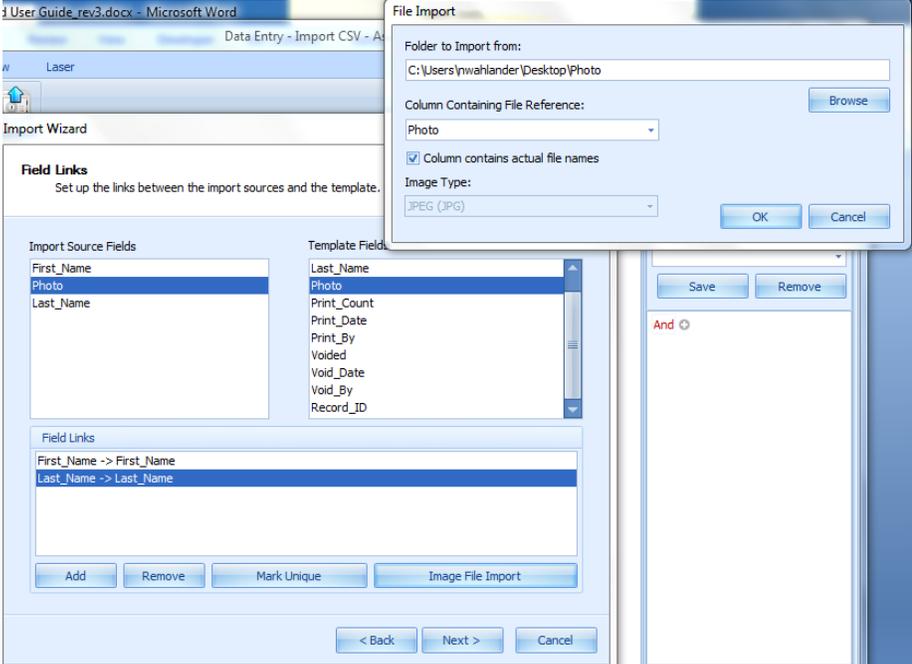| Step	Procedure
1	To add a record, begin by clicking **Add record**.
2	When capturing a photo from a digital camera (or similar) Click the **Application** icon. Click **Options** and then **Devices**. Select **Camera Type**, **TWAIN** or **WIA**. Click the camera from the list of capture devices, when completed click **OK** to close the Options dialog.
3	Right-click in the Photo field to select **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 and then click and drag the **Crop** tool, redraw the rectangle around the image and click **OK** to close the Edit Image dialog.
4	Enter data for the remainder of the data fields.
5	Click **Save** within the Records group. When the **Save** button is selected, the fields with the Preview are prefilled. To see a larger preview of the card, press **Ctrl + F2**.
6	Repeat Steps 3 - 5 to create all records.
7	Click the application icon and select the **Print** button. If information is read or written to a smart card during the print process, select the encoder in the **Printer Properties Selection** window.

Step	Procedure
8	The records are sent to the printer. If a smart card read or write occurs, the user selects the encoder installed in the printer. Additionally, the user is locked out of Asure ID to ensure proper synchronization of the print and smart card personalization information for each card.
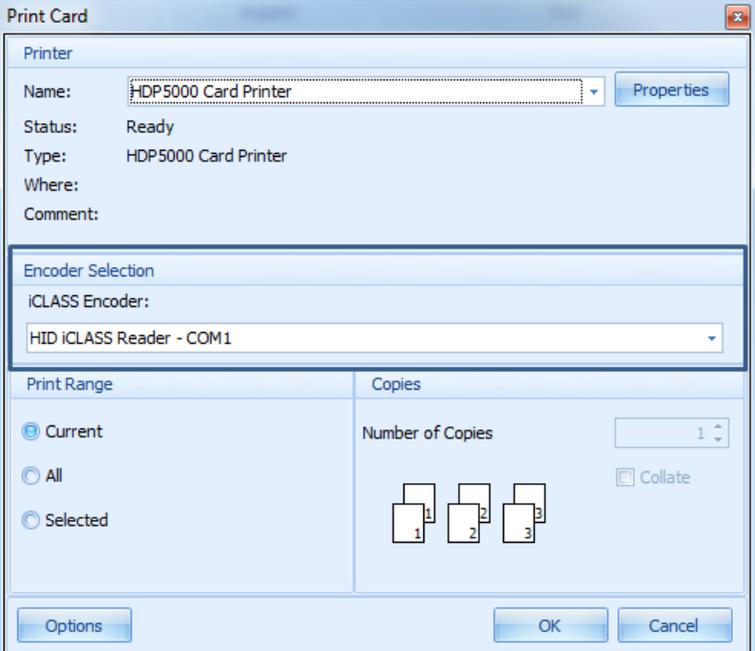
4.3   Additional Data Entry Elements

4.3.1   Import/Export

You can Import or export record information from a MS Access database, SQL Server Database, Oracle Database, and a comma-separated values (CSV) file.

Step	Procedure
1	MS Access database, SQL Server Database, Oracle Database, and a From the **Database** tab, select **Import Wizard**. Click **Next**.
2	Select the CSV type from the list. Click **Next**.
3	Click the **Browse** button to locate the database to be imported.
4	Specify the delimiter in the file and whether the file has a header row.
5	In the **Import Wizard**, map the data fields from the import source (that is, the CSV file) to the fields of the template by highlighting a field from each box and clicking **Add** (if they are not listed in the **Field Links** summary).
6	Import photos at this time, remove any pre-existing links that came into the wizard as photos. For a CSV source, import the photos to be retrieved from an external folder.
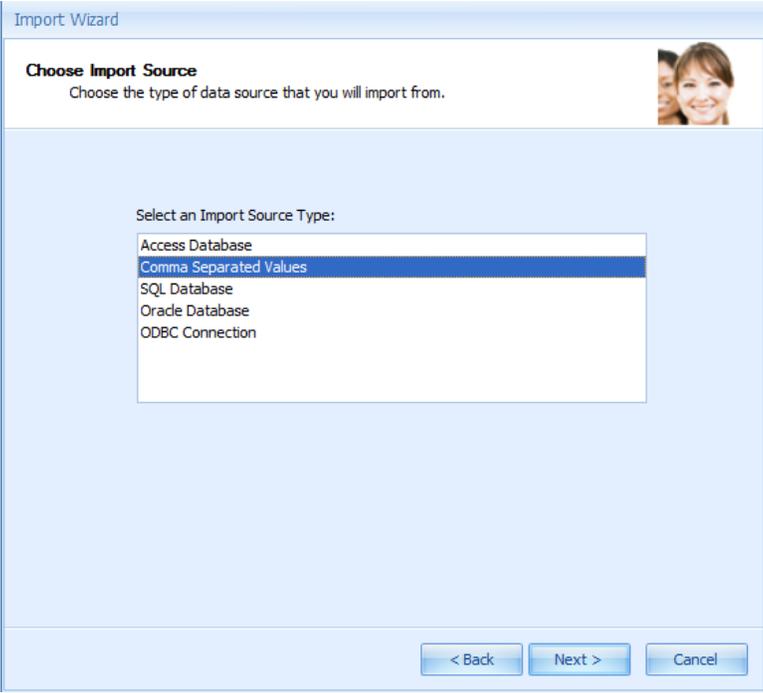
Step	Procedure
7	Within **Template Fields**, highlight the field that pertains to the photos; click **Image File Import** to open the **File Import** window. Browse to the photo location. Identify the column within the CSV file that references the photo name. If the name contains the full name of the file, including file type (for example, john.jpg), click **Column contains actual file names**.
8	Mark one field as Unique.
9	After all required fields are mapped and a unique field is identified, click **Next**.
10	In the **Import Options** dialog, choose to update existing records, import new records, or both. Click **Next**.
11	Click **Begin Import**.
12	Records are imported.
13	Click **Finish**.
14	The data entry view updates with your changes.

4.3.2   Layout View

Customize allows users to define how the fields, photos and signatures in the template are formatted in **View Layout**. When saved, these changes are recalled the next time the template loads.
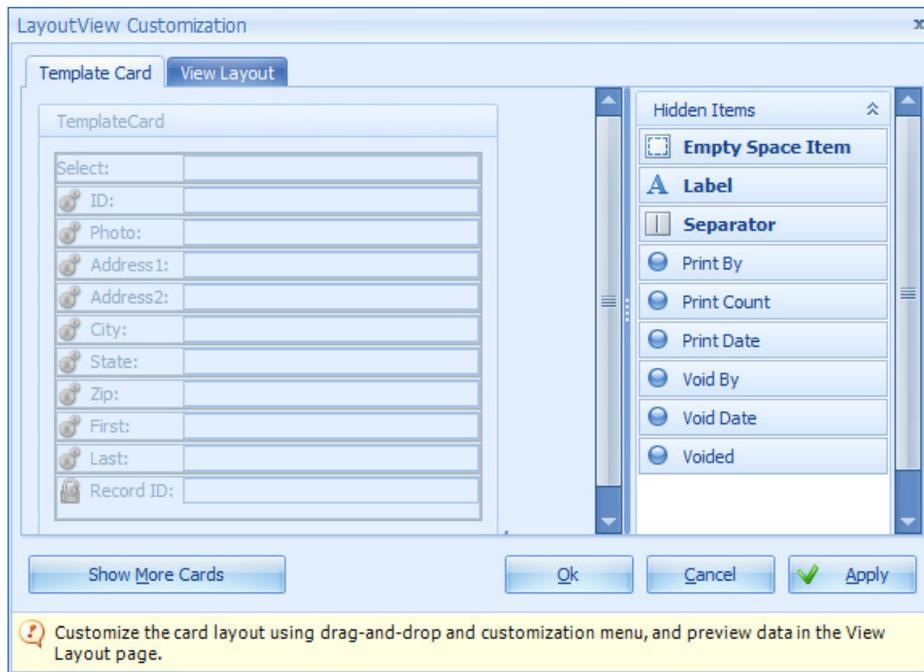
4.3.3 Void

The **Records** group on the **Home** tab contains the **Void** function. There is no function to un-void a record, so the void action is permanent. **Select All** and **Select Record** options do not select voided records. Voided records cannot be printed.

Step	Procedure
1	Select the record to be voided from the Data Entry application. Confirm the **Void Record** verification window. There is no function to un-void a record. If record is required later, it must be added as if it is new. If unique fields are included, delete the voided record before adding. The **Select All** and **Select Record** options do not include voided records.
2	Voided records cannot be printed. After a record has been voided, it can no longer be edited. The data fields are disabled. The preview includes **Void** written across the card.
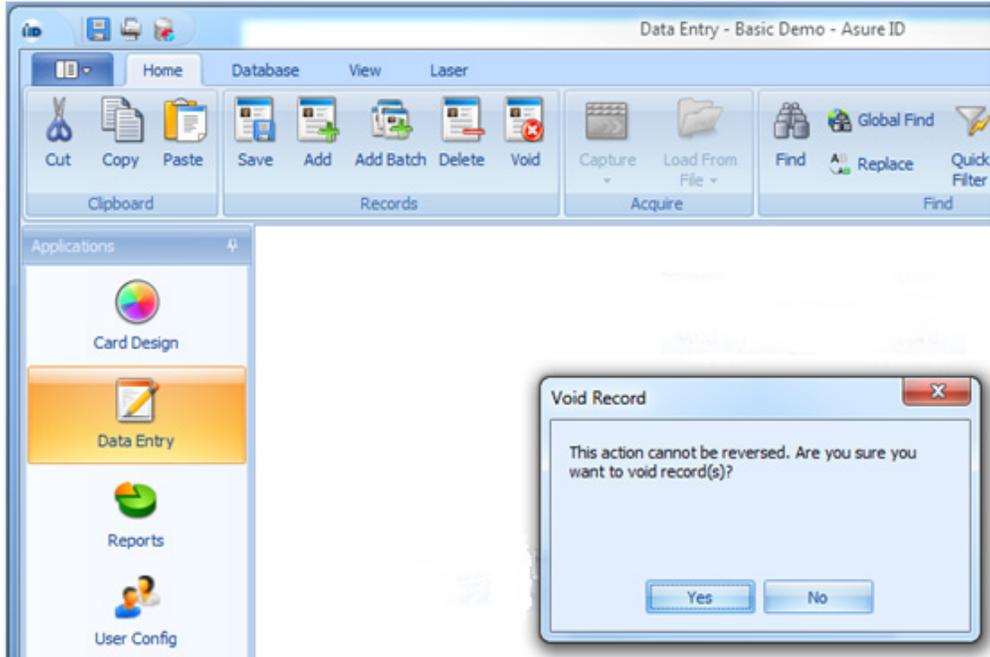
5   User Config Application

The Asure ID user configuration module manages user definable privileges with a username and password for setting each user profiles. This capability is only available in Asure ID Express and above. Administrators limit or enable user privileges for the following Asure ID capabilities.

- Create a userID with a friendly name
- Access the Card Design application.
- Access the Data Entry application.
- Access the card printing function within the Data Entry application.
- Access the User Configuration application.
- Access the Report application.
- Access to the Laser Engraving application (only available with Asure ID Exchange)
- Access the Program Options settings located under the application button.

5.1   Add User

Store your passwords in a secure location. For security reasons, the HID support team is unable to retrieve your password if lost.

Step	Procedure
1	To create a new user the Administrator, click **Add User**. Enter the user name, set the user ID, password and privileges for the new user.
2	Click **Save**.
3	Click **Change Password** to set the password for the user
4	Repeat as necessary.

6   Reports Application

The **Reports** application supplies you with a number of preformatted reports for application operation. Customize preformatted reports in terms of layout, columns, and filters. When the reports are customized, save them for quick access. The preformatted reports are grouped into the several sections.

6.1   User Reports

- **User List** – This report outlines all of the Asure ID users and their capabilities.
- **User Activity** – This report outlines all of the activities performed by the user, which includes adding or modifying a record.
- **User Login** – This report outlines the date and time of when a user logs in and out of Asure ID.

6.2   Data Entry Reports

- **All Records for a Template** – This report outlines all of the records for a particular template and its associated data fields.

- **Records with no Photos** – This report outlines all of the records for a particular template which do not have a photo, if applicable.

- **Unprinted Records** – This report outlines all of the records for a particular template which have not been printed.

- **Voided Records** – This report outlines all the records for a particular template which have been set as void. **(Note:** You may not set records back that have been voided.)

- **Template History** – This report outlines all of the user activity for all of the templates that are stored within Asure ID

- **Template Print History** – This report outlines all of the user print activity for all of the templates stored within Asure ID

6.3   Card Design Reports

- **Template List** – This report outlines all of the details for each of the card templates stored within Asure ID

- **Data Fields for Template** – This report outlines all of the data fields and their type for a given template

7 Selected Asure ID Options

The **Application** drop-down menu includes controls for actions like **Save Template** and **Print Template**. This window also provides a list of recent documents, access to application options and application exit.
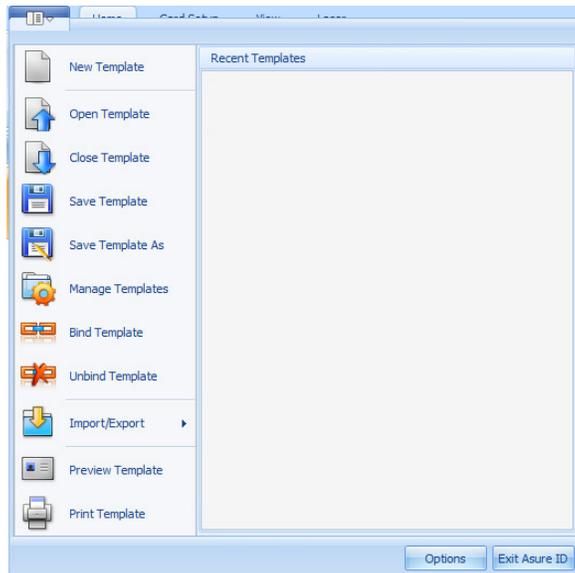
**Options** provide instructions for setting or modifying settings and preferences.
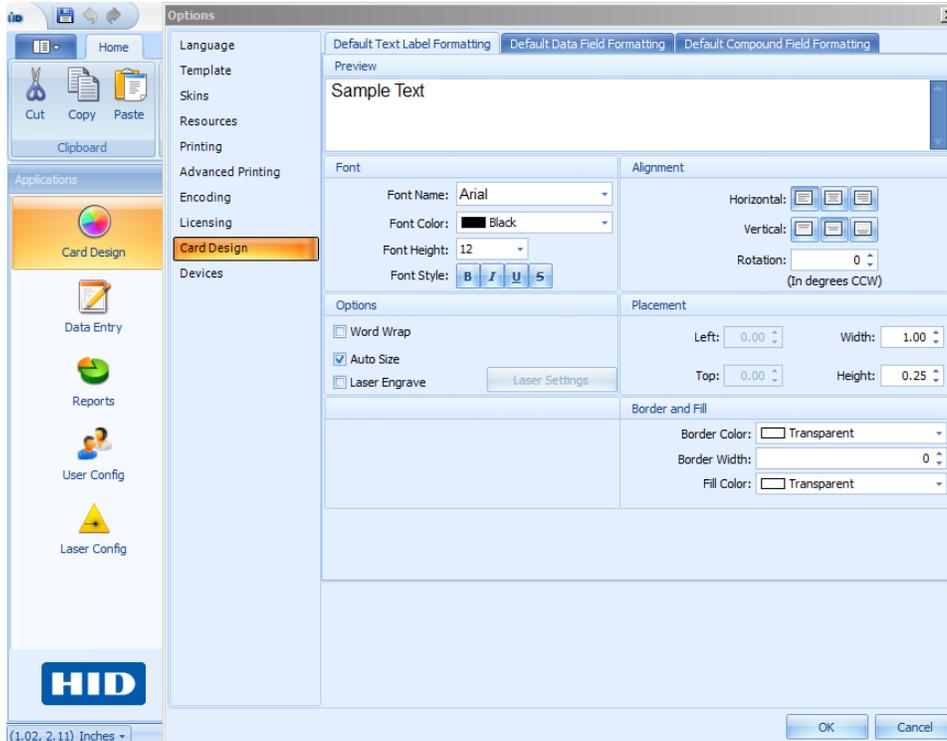
7.1 Template Options

The **Template** screen includes the **Default Image Format**, **Database Query Options** and **Advanced Options**.

The **Default Image Format** provides the capability to override this default image format from within the **Photo and Signature** property dialog. Select the preferred format for your image. It is applied when you use the Photo or Signature imaging in Card Design.

PNG is the default image format in Asure ID 7.
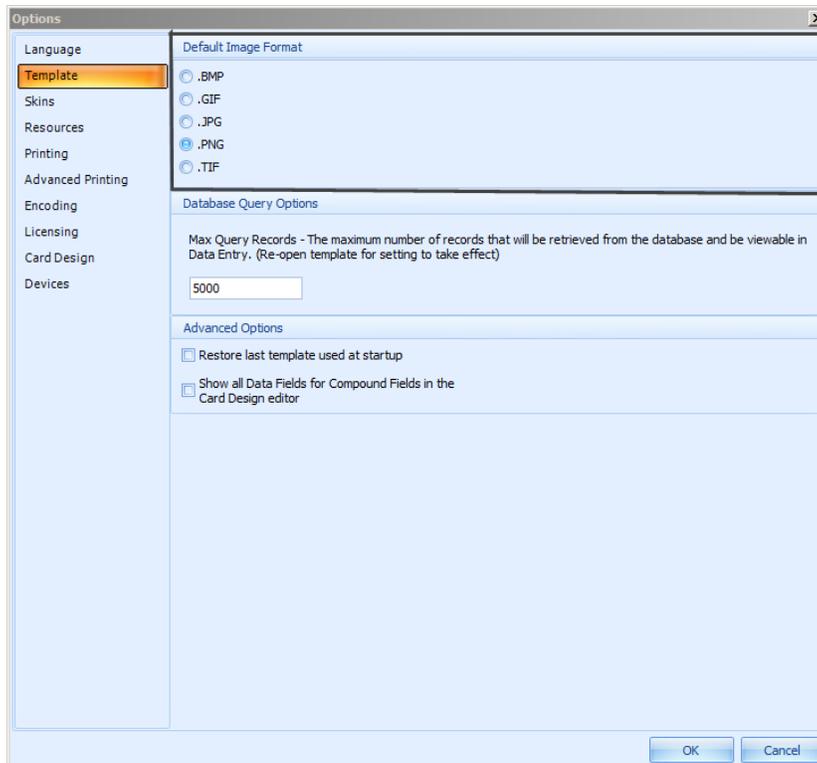
7.2   Resources and Check for Updates

The **About** window has the specific version numbers for **Card Design**, **Data Entry**, **Reports**, and **User Config**.
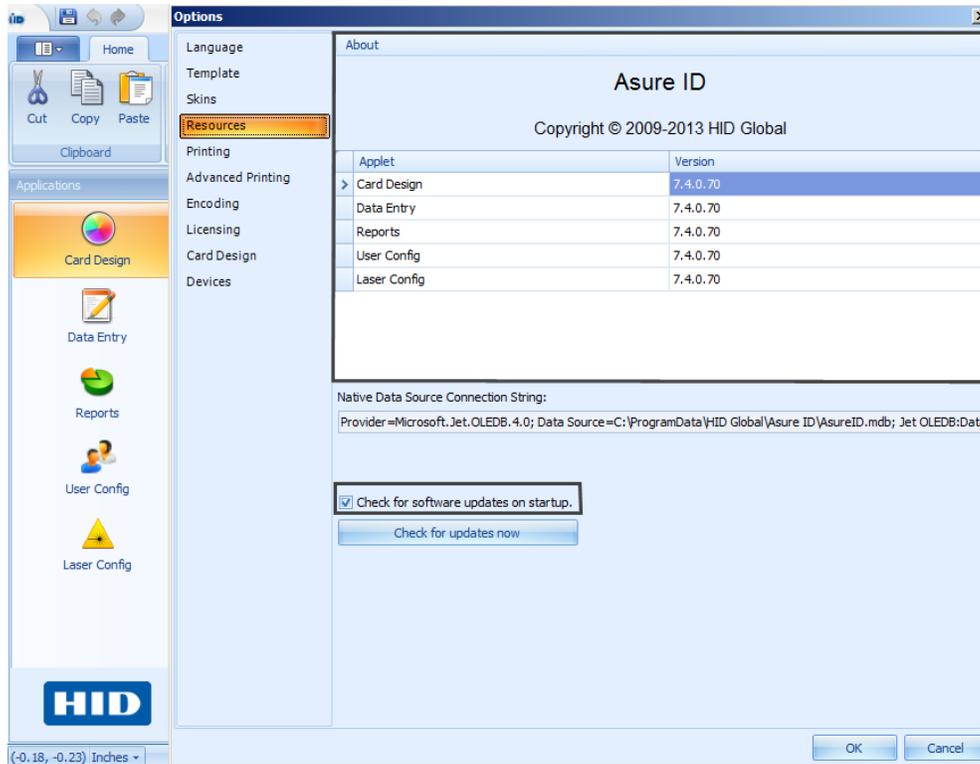
Select **Check for software updates on startup** to automatically search for software updates when you start Asure ID.
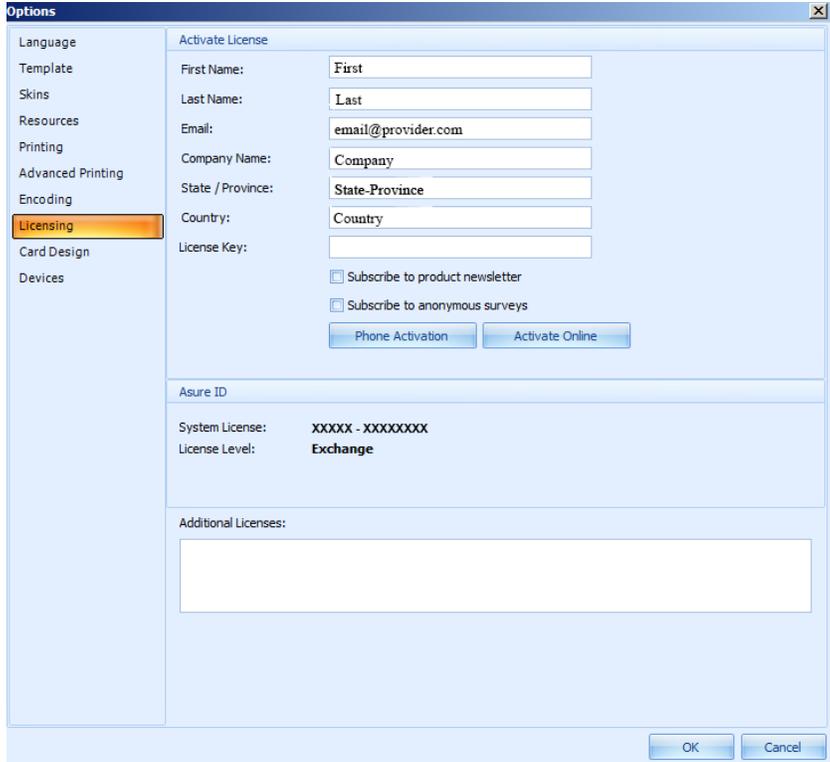
You can manually check for updates at anytime by clicking **Check for updates now**. If updates are available, the updates are installed. This update does not delete or modify any of the card templates and card records.

(Note: Internet access is required to check for updates.)

8 Licensing

Licensing stores user information and license keys that aide in troubleshooting and providing assistance if you misplace your key.

(Note: Set this option prior to using the software.)

Step	Procedure
1	Click **Licensing** to display the **Licensing** window.
2	Select your subscription options.
3	Click **Phone Activation** or **Activate Online** if you would like to upgrade your Asure ID edition or add additional license key configurations
4	Click **OK**.

9 Data Connection

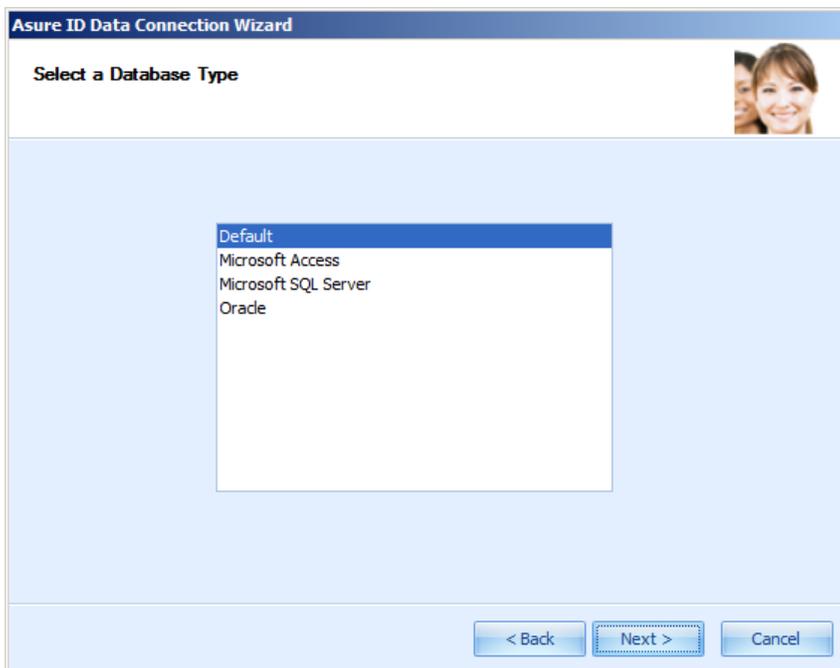## 9.1 Create a New Native Database – Access, SQL, Oracle

When you install Asure ID, it uses an Access database that stores configuration tables, templates and cardholder data. To use SQL Server or Oracle as the native database, follow these steps.
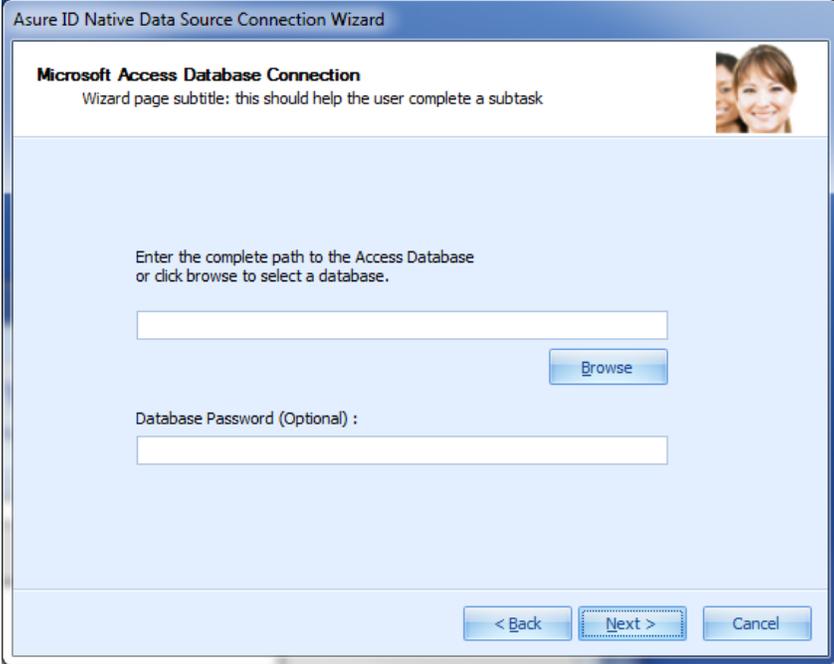
Step	Procedure
1	Your System or Database Administrator runs a set of scripts to create all the database objects required for Asure ID 7. The Administrator directs the application to the database. If not finding the database, generate a new database by selecting the required path. Upon the next start up, the new database is accessed.
2	To install scripts: Go to **Program Files\HID Global\Asure ID\Scripts**. Found are the following two files. • AsureID_MSSQL.sql • AsureID_Oracle.sql The Administrator runs whichever set of scripts is applicable for the chosen database. Furthermore, the Administrator creates a user that has Select, Insert, Update, Delete and Create privileges.
3	After creating the required objects in the database, access the following. **[start]** **[All Programs]** **[HID Global]** **[Asure ID]** **[Data Connection Wizard]**
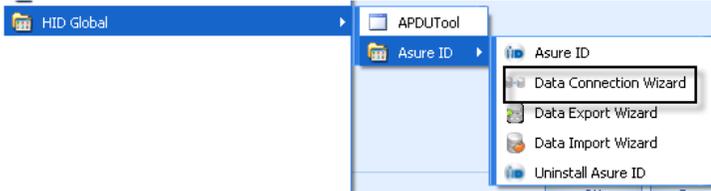
4	Click **Next**.
5	Select the correct database. Listed is the Access database for directing the system back to the Access database installed with the application. Any other Access databases are not a valid option for a native data source.

6	Enter the parameters required to connect to the newly created database.
	You must know the userID and password. They are used by all Asure ID users to connect to the database. All users need one database userID and password. This userID and password are not visible to Asure ID users.
	Asure ID Native Data Source Connection Wizard **Microsoft Access Database Connection** Wizard page subtitle: this should help the user complete a subtask Enter the complete path to the Access Database or click browse to select a database. [_____] Browse Database Password (Optional) : [_____] < Back Next > Cancel
7	This information resides in the computer registry and remains persistent, unless it is changed using the Data Connection Wizard.
	Re-linking the database location does not migrate data, you must complete data migration manually.
	Any new templates added in Asure ID are saved in the new data source.
	(Note: You should no longer use the Access database installed with the system.)
	When using Asure ID for the first time after making the change, the only valid user is the Admin user.

8	Click **Finish**. The connection is tested and a message is displayed.

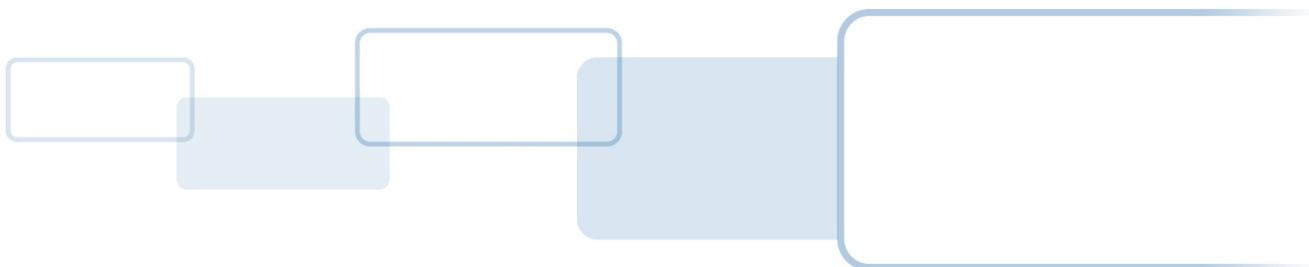**HID Global Headquarters:**

North America: +1 949 732 2000

Toll Free: 1 800 237 7769
Europe, Middle East, Africa: +49 6123 791 0

Asia Pacific: +852 3160 9800

Latin America: +52 477 779 1492

support.hidglobal.com

hidglobal.com