

ASURE **iID**™

QuickStart Guide



Use this handy booklet to help you get up and running with Asure ID Express and Asure ID Enterprise.

Syner**card**
www.synercard.com

Protect Your Investment In Asure ID

Asure ID™ Protect is a comprehensive customer care program designed to ensure that you receive the highest level of priority support, latest enhancements and major new version releases for your Asure ID products.

For only a small annual fee you will receive:

- Priority support via Synercard's automated online case management system;
- Priority support via telephone, fax and email;
- Product enhancement packs; and,
- Version upgrades on new product releases.

To sign up for **Asure ID Protect**,
contact your Synercard Partner or call
1-819-777-6687.

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

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

1. Installing Asure ID

- Step 1
- Step 2 (Asure ID Setup)
 - i. For Asure ID Express Users
 - ii. For Asure ID Enterprise Users

2. Registering Your Purchase

3. A Step-By-Step Tutorial

- Adding Users And Defining Privileges
- Designing A Card Template
- Creating A Cardholder Record
- Printing A Card

4. Using An Asure ID Card Service Bureau For Back-Up Or Primary Card Printing

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

Section 1

Installing Asure ID

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

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

Step 1

To begin the Asure ID setup, simply place the Asure ID CD into your computer's CD-ROM drive. Within a few moments the install wizard will begin and guide you through the installation of Asure ID.

During the installation routine you will be given the option to choose between a 'Complete' and 'Custom' installation. If you select 'Complete', the software will automatically be installed with the default options. If you select 'Custom', you will be given the option to choose a custom install location, as well as be given an option to select an alternative language.

When the installer has completed copying the files to your computer, press 'Finish' to complete the install wizard.

Please note that after pressing the 'Finish' button you may be prompted to reboot your system. If a reboot is required, you will not be able to use the Asure ID software until you have rebooted.

Step 2 (For Asure ID Express Users)

Please note that the information in this section is specific to Asure ID Express.

After completing the install wizard (after a reboot if prompted), you will see a screen appear that says **'Asure ID Setup'** in the title bar. This is the **'starter.exe'** setup utility.

On the first screen, you will see two fields that you must fill in. These fields are **'Company'** and **'Serial Number'**. Enter the name of your company in the first field. Next, enter your Asure ID serial number into the second field. The serial number can be found on the back of your Asure ID case. Please ensure that you enter the serial number **exactly** as it is printed on the sticker. When you have entered both the company name and the serial number, press the **'Next'** button to proceed.

Next the setup utility will ask you for a password for the **'Admin'** user account. When Asure ID is newly installed, only one account name is created for logging into the software. The username for this account is always **'Admin'**. This account will **always have full rights and access** in the Asure ID software, and it may be used to login to the Admin Center to create additional user accounts, logins, and permissions.

Type the password that you would like to use for the **'Admin'** account, and retype to confirm your choice in the **'Re-type password'** area. Press the **'Finish'** button to set the password on the account.

Congratulations! You have successfully completed the Asure ID installation.

Step 2 (For Azure ID Enterprise Users)

Please note that the information in this section is specific to Azure ID Enterprise.

After completing the install wizard (after a reboot if prompted), you will see a screen appear that says ‘**Azure ID Setup**’ in the title bar. This is the ‘**starter.exe**’ setup utility.

On the first page, you will see two fields that you must fill in. These fields are ‘**Company**’ and ‘**Serial Number**’. Enter the name of your company in the first field. Please note that if you are sharing a database and have multiple computers running Azure ID, it is essential to use the **exact same** company name for all of them. Next, enter your Azure ID serial number into the second field. The serial number can be found on the back of your Azure ID case. Please ensure that you enter the serial number **exactly** as it is printed on the sticker. When you have entered both the company name and the serial number, press the ‘**Next**’ button to proceed.

The next page of the setup utility lets you configure the database that you will use with Azure ID. You may select to use either an MS Access database (no external software required), or a Microsoft SQL Server database (Microsoft SQL Server 7.0 or 2000 required).

If you select an MS Access database, you may choose an existing database created from either a previous install of Azure ID v4.0 (or higher), or by another network user of Azure ID (in this manner you will ‘**share**’ the database created by the other user) by pressing the ‘**Browse**’ button, and navigating to the database you want to use.

Alternatively, you can create a new database by checking the ‘**Use Access Database**’ option, and leaving the ‘**Link to existing Database**’ checkbox clear. After making your selection, press the ‘**Next**’ button to proceed.

If you would rather use an SQL Server database, you must select **'Use SQL Server'**, and enter the name of the server (hostname, IP address, or machine name), as well as the username and password of an account with full permissions on the SQL Server (typically the **'SA'** account). Depending on the configuration of the SQL Server, you may need to place a check in the box marked **'Trusted Connection'** before pressing **'Next'** to connect to the SQL Server.

When using the SQL Server support, the setup utility will talk to the SQL Server, and determine if it already contains a database for your current version of Asure ID. If the database does exist, no changes will be made to it, and your Asure ID software will be configured to read and write to and from that database. You will need to have the Asure ID Administrator (who created the SQL database) create an Asure ID user account for you. If the Asure ID SQL Server database does not already exist, the setup utility will create it for you, and set up your account as the Asure ID Administrator.

Next the setup utility will ask you for a password for the **'Admin'** user account. When Asure ID is newly installed, only one account name is created for logging into the software. The username for this account is always **'Admin'**. This account will **always have full rights and access** on the Asure ID software, and it may be used to login to the Admin Center to create additional user accounts, logins, and permissions.

Type the password that you would like to use for the **'Admin'** account, and retype to confirm your choice in the **'Re-type password'** area. Press the **'Finish'** button to set the password on the account.

Congratulations! You have successfully completed the Asure ID installation.

Section 2

Registering Your Purchase

When registering your purchase of Asure ID you may choose from two types of registration - '**Online Registration**' and '**Offline Registration**'. Online Registration is the easiest method, and if you have a connection to the Internet, it is strongly recommended that you choose this option.

Selecting '**Online Registration**' will take you to a customer details page. Enter the required information, and then press the '**Register Now**' button. In a few seconds you will see a message stating that the registration has been successfully completed. Your software is now fully set up and ready to use.

Use of firewalls or the lack of an Internet connection could cause the '**Online Registration**' to fail, in which case you should perform the '**Offline Registration**'.

If you have chosen 'Offline Registration', you will see a dialog box asking you to call 1-819-777-8229, as well as an area to enter an Installation ID (IID) number (supplied by Synercard's customer registration team when you phone). Please call us between the hours of 9:00am and 5:30pm EST, Monday to Friday (excluding holidays). **Please note that the Asure ID software will not allow you to print until you have registered your purchase.**

Section 3

A Step-By-Step Tutorial

Adding Users Accounts And Defining Privileges

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

1 Launch the Admin Center application by selecting the Admin Center shortcut located on your '**Start Menu**' under **Programs\Asure ID\Express\Admin Center** or **Programs\Asure ID\Enterprise\Admin Center**.

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



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



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



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

Designing A Card Template

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

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



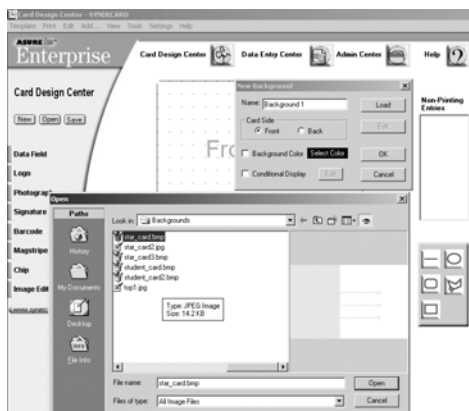
To create a new card template, press the 'New' button on the upper left of the main window.



After pressing the 'New' button, a 'Card Profile' window will appear asking you to specify the 'Template Name' (We've used 'SYNERCARD' for our example), 'Card Type' and 'Orientation' of the new card. These are fundamental aspects of the cards' appearance, and must be selected before the layout of the new card can be displayed. For this tutorial, select 'CR80' (credit card size - by far the most common card size in use today) for 'Card Type' and select 'Landscape' for the 'Orientation'.



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



Edit the image by clicking on the **'Edit'** button. An **'Edit Image'** window will appear giving you the option to crop (selecting the area of image to be used) the image. To crop the image simply resize the crop selection frame over the portion of the image you wish to use as the background. When you are satisfied with your selection click **'Capture'**.



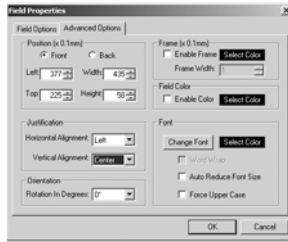
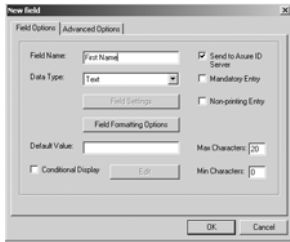
Repeat steps 8 and 9 to choose a background color or image for the back of the card if required. You can change the background appearance at any time within the Card Design Center simply by double-clicking on the background and following the steps described above.

A look at the Card Design Center's main button panel (on the left side of the screen) shows buttons for **'Data Field'**, **'Logo'**, **'Photograph'**, **'Signature'**, **'Barcode'**, **'Magstripe'** and **'Chip'** (the **'Chip'** option is not available in Asure ID Express). Although there are a wide variety of options, they are all added to the card in the same simple fashion. Simply press the button of the item that you want to add.

We will next add a **'First Name'** field to your card. Begin by simply pressing the **'Data Field'** button on the left hand side of the screen and positioning your cursor over the area (on the displayed **'front'** side of the card) where you would like the field to appear.



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

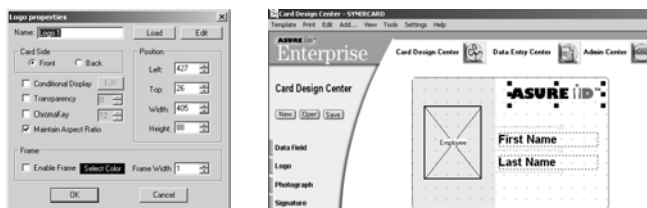


Add another data field and repeat the steps in sections 10 and 11 but instead of 'First Name' type 'Last Name' into the 'Field Name' area.

Add a field for a photograph by pressing the 'Photograph' button on the left hand side of the screen and positioning the cursor on the front side of the card, and clicking the left mouse button. Name the new photograph field 'Employee' and enable a frame (choose the same 'Frame Color' as you used for the 'First' and 'Last Name' fields) by selecting the box next to the words 'Enable Frame' and set the 'Frame Width' to '4'. When you are satisfied click 'OK'.



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



When finished, save your card template by clicking the **'Save'** button.

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

Creating A Cardholder Record

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

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

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

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



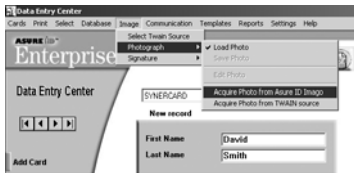
After you have selected the template, click on the **'Add Card'** button. You will notice that all of the data fields on the card will include an area to enter values into (these fields are grayed out until you press the Add Card button).



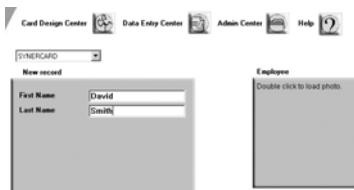
Simply click in each field and type in the appropriate data. You may also use the <TAB> key to move from one field to the next.



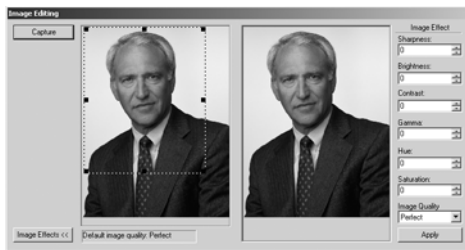
If the cardholder you wish to add is with you and you have an Asure ID Imago or TWAIN compliant digital camera attached to your computer, click on **'Image'** on the main menu bar at the top of the screen and select either **'Photograph'** and then select **'Acquire Photo From Asure ID Imago'** or **'Select Twain Source'** to configure your TWAIN camera. If you selected **'Select Twain Source'**, from the **'Select Source'** window, highlight the source you would like to set as the default photograph capture device and then press **'Select'**. You are only required to configure your TWAIN capture device once unless you wish to change the default device at some point in the future.



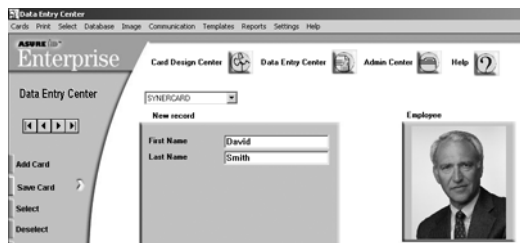
Once your camera (or scanner) is configured, double click within the large Photograph area in the Data Entry Center to capture the photo of your cardholder.



23 After you load (from file) or capture (Asure ID Imago, TWAIN camera or scanner) the photograph, you have the option to edit the image. To crop the image simply resize the crop selection frame that appears. When you are satisfied with your selection click **'Capture'**.

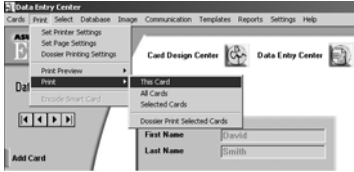


23 When you have filled the fields on your card template with all the data for the cardholder, press the **'Save Card'** button to add this record to the database.

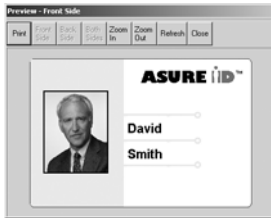


Printing A Card

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



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



Section 4

Using An Asure ID Card Service Bureau For Back-Up Or Primary Card Printing

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

Connecting To A Card Bureau

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

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

If you do not have the correct IP address or URL, you will need to contact your Asure ID Card Service Bureau (Synercard Partner) for this information. If the Synercard Partner who you purchased the Asure ID software from does not support this service then you will need to contact Synercard, by either phone, fax, email or through our online customer support option, to obtain the contact information of the Asure ID Card Service Bureau nearest you.

Tel: 1 (819) 777-6687

Fax: 1 (819) 777-8114

Email: sales@synercard.com

Web: www.synercard.com

Now that the IP address or URL is properly entered you will need to register (this should not be mistaken with software registration) the user(s) who will be responsible for sending card data, including template information, to the Asure ID Card Service Bureau.

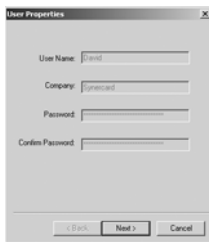
Registering With An Asure ID Card Service Bureau

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

3 To register a user, simply click on that user’s name to highlight it, and then press the **‘Register User’** button on the left hand side of the main **‘Admin Center’** screen.

4 A confirmation window will appear confirming the user name you are about to register, press **‘OK’** if you are certain that you want to proceed.

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



You will now be presented with the **'User Contact Information'** dialog box and are required to fill in all the fields, giving details about the user being registered.



To finish the registration process you will need to fill out the billing and shipping information associated with the user being registered in the **'User Billing Information'** dialog box. When you are done press **'Finish'** to register.



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

That is all that there is to registering a user with an Asure ID Card Service Bureau!

Before you can send card records, you will first need to transmit the template data for your card design.

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

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

10 Now all that is left to do is to send the card data. You have several options when sending card data to the Asure ID Card Service Bureau: '**Send Displayed Card**', '**Send Selected Cards**' or '**Send All Unsent Cards**'. You may choose which one you would like to do in one of two ways.

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

12 Alternatively, you may use the '**Communication**' drop down menu (at the top of the screen) and make your selection from the three options presented. Within a few seconds (depending on the quantity of cards sent and the speed of you Internet connection) you will be presented with a receipt including the name of the user, the date, the number of cards sent, and a card transaction number for future reference. You will also notice a '**sent card**' icon appear to the left hand side of any card record that has been successfully sent to an Asure ID Card Service Bureau.

Use this '**pay as you print**' card bureau service for backup or primary card production and see for yourself why using the Asure ID software really does mean peace of mind.

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