

**ASURE *i*ID<sup>®</sup>**

# QuickStart Guide

## Protect Your Investment In Asure ID

Save Valuable Time And Money With Asure ID Protect!

Asure ID Protect™ is a comprehensive customer care program designed to ensure that you receive the highest level of priority customer support with your Asure ID products.

For only a few dollars per year you will receive:

- **A guaranteed response time**
  - Support cases received during regular business hours will be responded to within two (2) hours
- **Unlimited priority customer support using Synercard's Automated Online Case Management and Service Portal.**
  - View top solutions used by Synercard's Customer Support Team
  - Search a real-time knowledge base for a specific solution
  - Log a case directly into Synercard's Automated Case Management System
  - Submit a feature request and track its status
  - View open cases and get real-time status and solution updates
  - Add comments or attachments to cases
  - View cases submitted by your colleagues
- **Unlimited priority customer support via telephone and fax.**
  - Telephone Support:  
(877) ASURE ID (Within North America)  
(819) 777-6687 (Outside North America)
  - Fax Support: (819) 777-8114

To sign up for **Asure ID Protect**,  
contact your Synercard Partner or call  
**1 877 ASURE ID or 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 software working for you. This guide is divided into the following three sections:

### 1. Installing Asure ID

### 2. Registering Your Purchase

### 3. A Step-By-Step Tutorial

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

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

## 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, a splash screen will appear, asking you to select the product you would like to install. Click on the image of the appropriate software to continue. If you have CD Autoplay disabled, simply browse to the CD-ROM and launch "setup.exe".



## Step 2

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

## Step 3

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

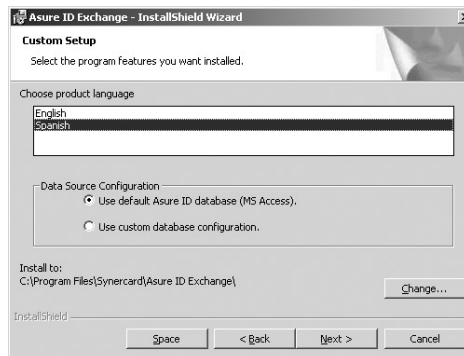


## Step 4

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

## Step 5

If a Custom Installation has been selected, you will see the installation options, which may be slightly different from one Asure ID product to another.



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

**Asure ID Enterprise** users will be able to choose either “Microsoft Access” or “SQL Server” for the software’s database.

If “SQL Server” is selected, you will be presented with a setup page to enter “Server” (SQL Server network name or IP Address), User Name (“sa” or equivalent Administrator account on the SQL Server), and Password (the password for the supplied SQL Administrator account).

If “Microsoft Access” is selected, the database will be installed and configured automatically.

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, with the password you selected on the previous page of the Install Wizard.

**Asure ID Exchange** users will be able to select either “Use default Asure ID database”, or “Use custom database configuration”. Select “Use default Asure ID database” to create a new Microsoft Access database for Asure ID Exchange. If a custom database is selected, it will be configured after the installation is complete and the computer rebooted. This procedure is described in Step 9 of this section. When you have made the appropriate custom installation options, press the “Next” button to continue.

## Step 6

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

## Step 7

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



## Step 8

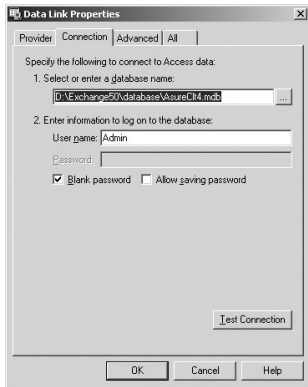
Depending on your system and the install type you selected, you may need to reboot your computer before the installation will be complete. If a message is presented, you must reboot your computer before you can use Asure ID. If you do not see a message, you may launch Asure ID immediately, using the shortcuts that have been placed on the Windows Start Menu, in the “Programs\Syncercard\Asure ID...” folder.

## Step 9

For Azure ID Exchange users who chose a “Custom Data Source Configuration” in the installation options, the Data Link Properties page will appear after you reboot the computer.

## Step 9A

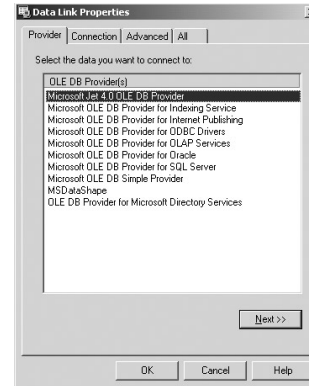
If you would like to use Azure ID Exchange’s standard Microsoft Access database, simply press the “OK” button to accept the default settings, and the window will close with Azure ID Exchange now ready to use.



## Step 9B

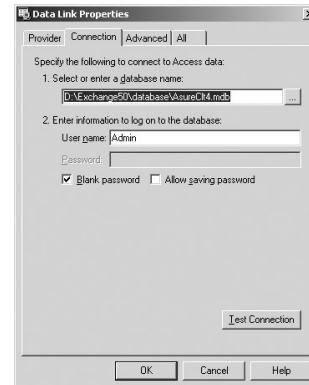
If you would like to use a different database, select the “Provider” tab at the top of the window, and select the appropriate data source driver from the list provided.

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



## Step 9C

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



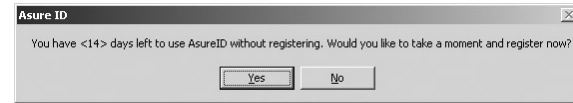
When you have made the appropriate database and authentication settings, press the “Test Connection” button to test the settings. If you see a message stating that the database connectivity tests were successful, you have made the correct settings, and can press “OK” to save the database configuration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

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

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

## Section 2 – Registering Your Purchase

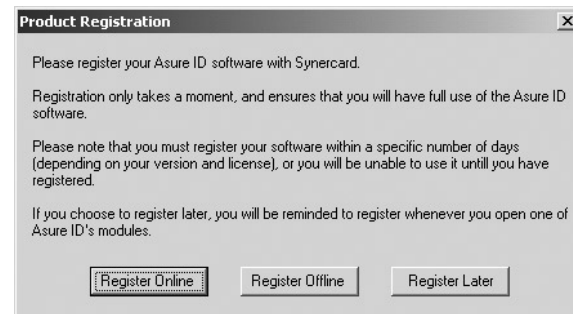
When you launch Asure ID, you will be asked to register the software. You will be able to use the software for a fixed number of days (depending on the version of the product) before registering, after which time you must register before you can use the product again.



PLEASE NOTE THAT YOU WILL NOT BE ABLE TO USE THE PRINT FEATURE WITHIN ASURE ID UNTIL YOU HAVE REGISTERED THE SOFTWARE.

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

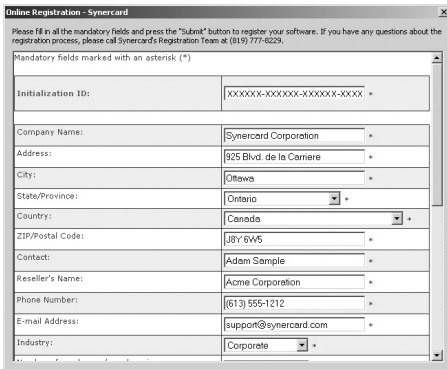
When you choose to register the software, you will be given the option to register online, register offline, or register later. If you select register later, the product registration options will close, and you may still use Asure ID within the time limit before you need to register.



## REGISTER ONLINE

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

After selecting “Register Online”, you will see a customer information page. Please fill out the different items and press “Submit” to continue.



The screenshot shows a web form titled "Online Registration - Synercard". At the top, there is a message: "Please fill in all the mandatory fields and press the 'Submit' button to register your software. If you have any questions about the registration process, please call Synercard's Registration Team at (819) 777-6687." Below this, a note states: "Mandatory fields marked with an asterisk (\*)". The form contains the following fields:

Initialization ID:	XXXXXXXX-XXXXXX-XXXXXX-XXXXXX *
Company Name:	Synercard Corporation *
Address:	825 Blvd. de la Carriere *
City:	Ottawa *
State/Province:	Ontario *
Country:	Canada *
ZIP/Postal Code:	J8Y 6W5 *
Contact:	Adam Sample *
Reseller's Name:	Acme Corporation *
Phone Number:	(613) 555-1212 *
E-mail Address:	support@synercard.com *
Industry:	Corporate *

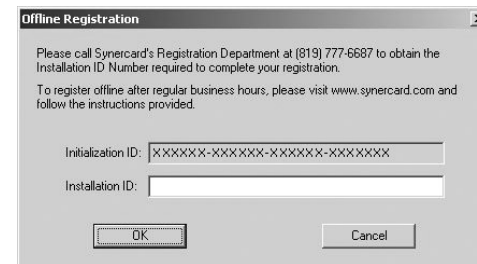
The Online Registration program will communicate with Synercard’s registration servers over the Internet, and you will see a progress meter as this occurs. Once the registration has been accepted and confirmed, you will see a “Registration Successful” message. The window will automatically close after a couple of seconds, and your Asure ID registration is complete.

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

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

## REGISTER OFFLINE

If you select “Register Offline” for the registration option, you will see the Offline Registration window. Please phone the number shown on the window, and select the option for Asure ID Product Registration. You will have to read the number displayed in the “Initialization ID” column to the operator, who will issue you a corresponding number to enter into the “Installation ID” column. This number pair is unique to your current installation, and cannot be used again. After you enter the number issued by the operator, press “OK” to save your registration data. You may now run Asure ID using the shortcuts that have been placed on the Windows Start Menu, in the “Programs\Synercard\Asure ID...” folder.



The screenshot shows a dialog box titled "Offline Registration". It contains the following text:

Please call Synercard's Registration Department at (819) 777-6687 to obtain the Installation ID Number required to complete your registration.

To register offline after regular business hours, please visit [www.synercard.com](http://www.synercard.com) and follow the instructions provided.

Initialization ID: XXXXXX-XXXXXX-XXXXXX-XXXXXX

Installation ID: \_\_\_\_\_

Buttons: OK, Cancel

## WEB REGISTRATION

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

## LAUNCHING ASURE ID

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

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



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

## Step 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.

#### Step 1

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

#### Step 2

You will be prompted to enter a user name and password — type ‘Admin’ (without the quotation marks) and the password that you created during the setup routine process, and press “OK”.



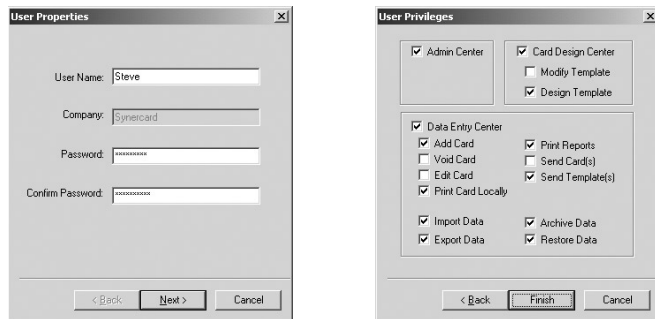
### Step 3

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



### Step 4

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



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

### DESIGNING A CARD TEMPLATE

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

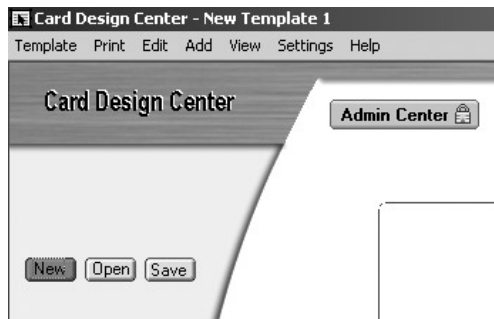
### Step 5

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



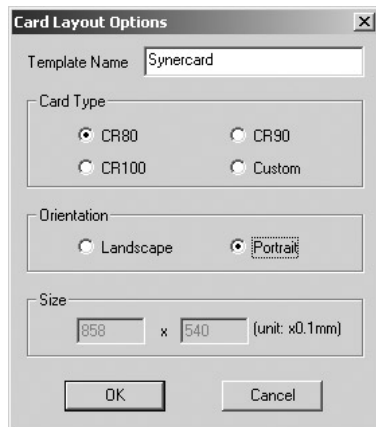
## Step 6

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



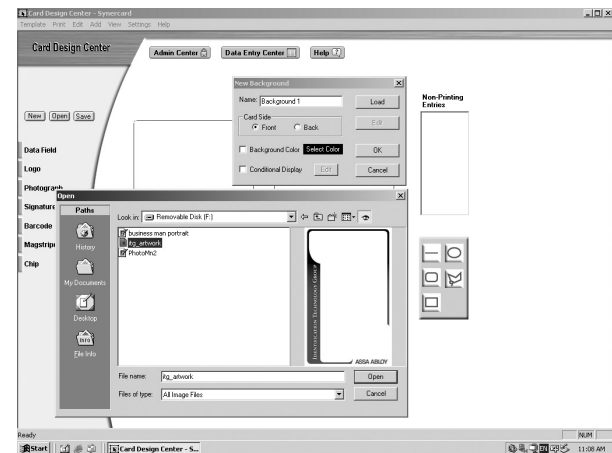
## Step 7

After pressing the 'New' button, a 'Card Layout Options' 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 card's 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 'Portrait' for the 'Orientation'.



## Step 8

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 a 'Open' dialog box will appear, allowing you to choose an image. When you have located the image that you would like to use, press the 'Open' button.



## Step 9

Edit the image by clicking on the 'Edit' button. An 'Edit Image' window will appear giving you the option to crop (selecting the area of image to be used) the image. To crop the image, simply resize the crop selection frame over the portion of the image you wish to use as the

background. When you are satisfied with your selection click 'OK', and then 'OK' again to close the 'New Background' dialog box, and load your image onto the card area.

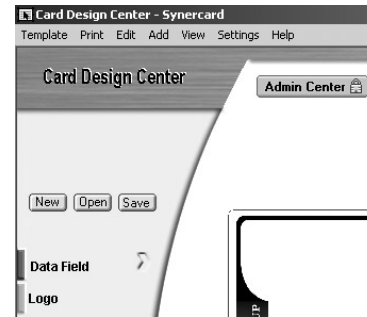


Repeat steps 8 and 9 to choose a background color or image for the back of the card if required. You can change the background appearance at any time within the Card Design Center simply by double-clicking on the background and following the steps described above.

A look at the Card Design Center's main button panel (on the left side of the screen) shows buttons for 'Data Field', 'Logo', 'Photograph', 'Signature', 'Barcode', 'Magstripe' and 'Chip' (the 'Chip' option is not available with Asure ID Express or Asure ID Enterprise). 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, then click within the card area to place the selected item.

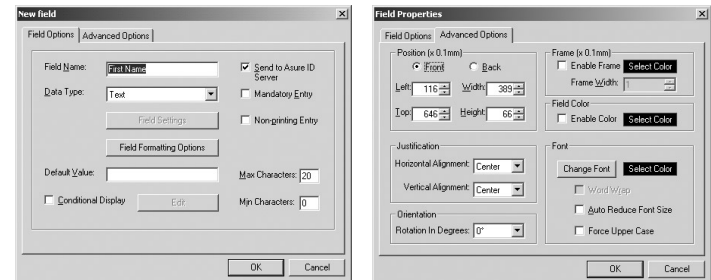
## Step 10

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



## Step 11

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

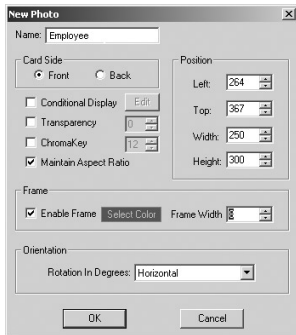


## Step 12

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

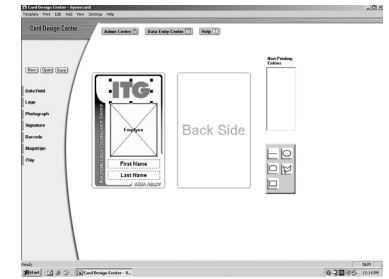
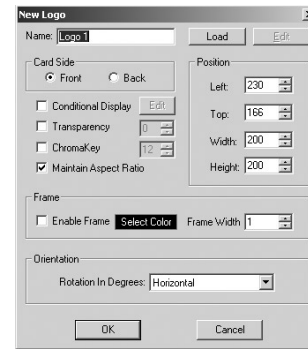
## Step 13

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



## Step 14

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



## Step 15

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

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

## CREATING A CARDHOLDER RECORD

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

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

## Step 16

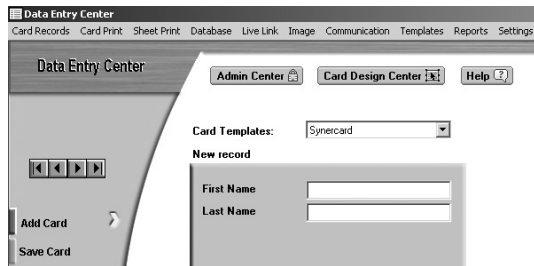
If you are still in the Card Design Center, enter the Data Entry Center by clicking the ‘Data Entry Center’ button at the top of the screen.

## Step 17

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

## Step 18

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



## Step 19

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

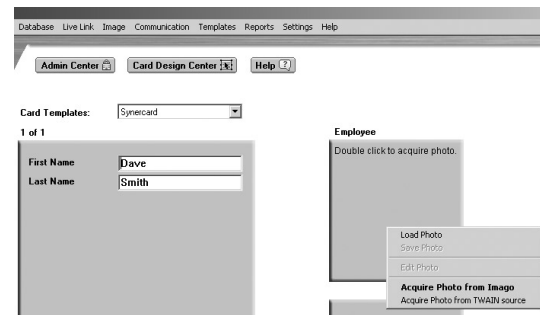
## Step 20

If the cardholder you wish to add is with you and you have a TWAIN compliant digital camera attached to your computer, click on 'Image' on the main menu bar at the top of the screen and choose 'Select Twain Source' to configure your TWAIN camera. Next, from the 'Select Source' window that appears highlight the source you would like to set as the default photograph capture device and then press 'Select'. You are only required to configure your TWAIN capture device once unless you wish to change the default device at some point in the future.



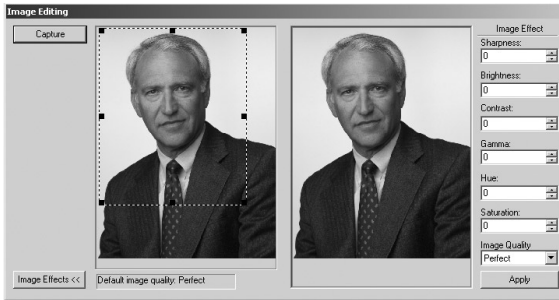
## Step 21

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



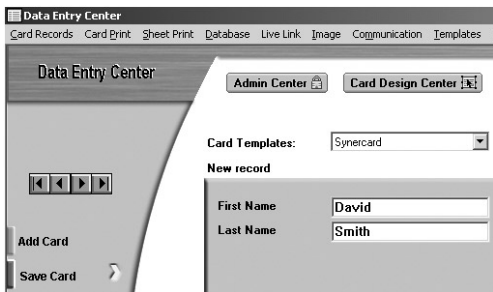
## Step 22

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



## Step 23

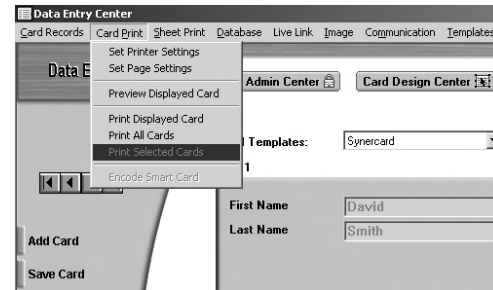
When you have filled the fields on your card template with all the data for the cardholder, press the 'Save Card' button to add this record to the database.



## PRINTING A CARD

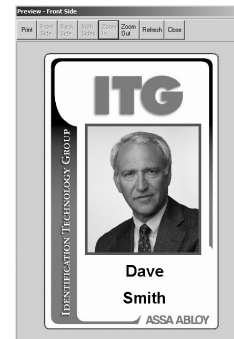
### Step 24

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



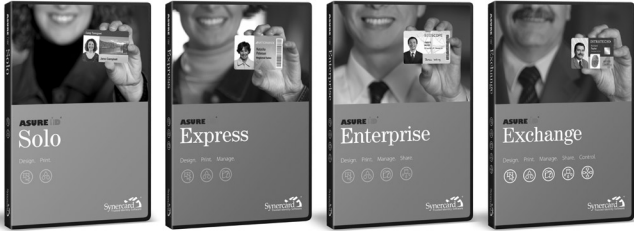
### Step 25

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



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

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