

ASURE iID[®]

Exchange

Live Link

QuickStart Guide

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Introduction To Live Link™

Designed for integrators and users with some database knowledge, the Live Link toolset provided within Asure ID Exchange enables real-time data communication with most any third party database application.

Use Live Link to quickly add the power and functionality of Asure ID Exchange to your chosen Access Control, Logical Access, Time & Attendance, HR or Enterprise solution with only a few simple clicks.

Background

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

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

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

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

Getting Started

This easy to use QuickStart Guide provides you with the information you will need to quickly configure and use the Live Link tools. This guide is divided into three main sections:

1. Selecting A Database

2. Mapping Fields

3. Activating A Live Link Configuration

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 – Selecting A Database

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

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

Step 1

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

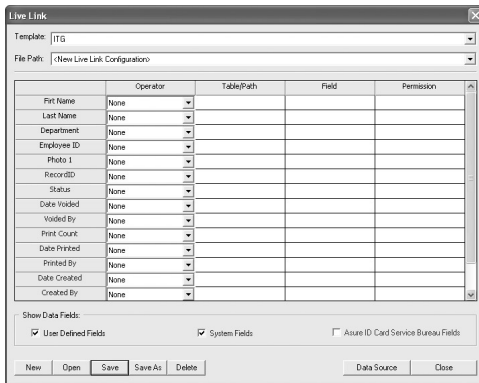


You will see three items on the menu – Choose 'Add LLF' to create a new Live Link File, or 'Edit LLF' to modify an existing Live Link File. The 'No Live Link' item (which is checked by default when there is no active Live Link File) is used both to denote when there is no active Live Link File, as well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

Please note your Azure ID account must have been granted ‘Admin’ privileges to use the Live Link tools. If you do not have the appropriate rights, ask your Azure ID administrator to edit your account in Azure ID’s Admin Center so that you will have the appropriate permissions.

Step 2

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

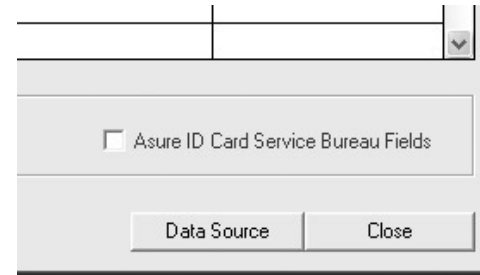


The Live Link configuration tool includes drop-down lists to select the template that the Live Link File will apply to, as well as the path to save the Live Link configuration file to. The main section of the window lists all of the fields that are included with the template, and after configuration,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

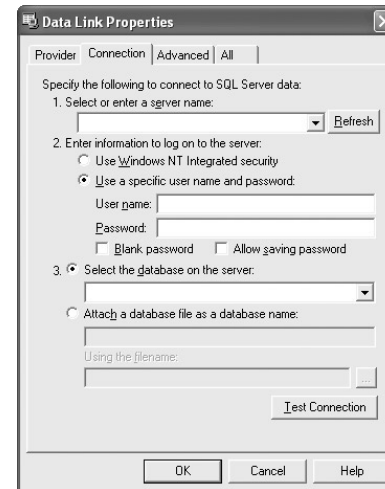
Step 3

Since we have launched the tool by selecting ‘Add LLF’, we are by default working with a new configuration, so all of the mapping fields are empty. When starting a new Live Link configuration, the first thing that we must do is to select the database we want to work with. Press

the ‘Data Source’ button on the lower right of the window to configure the database selection.

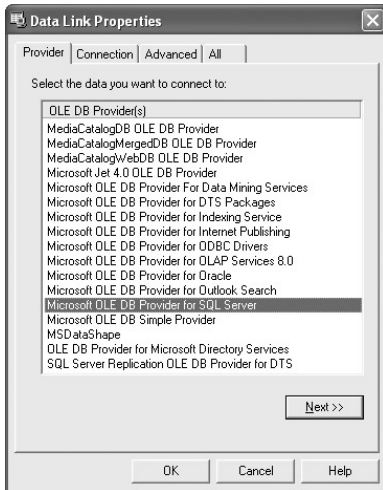


A ‘Data Link Properties’ window (shown below) will appear. We will use this window to accomplish two essential tasks – selecting the database, and providing authentication information.



Step 4

First, we want to select the type of database we will be working with. Select the ‘Provider’ tab at the top of the window, and a list of database drivers will appear under ‘OLE DB Provider(s)’.



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

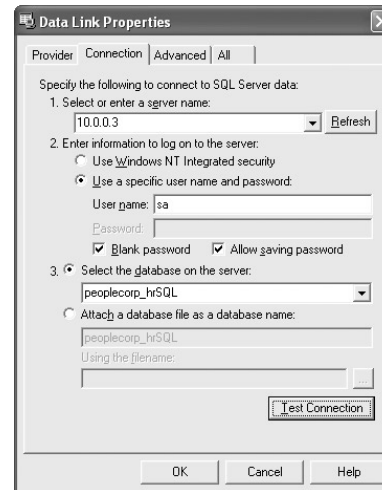
If the database type you wish to link to is displayed, select it and then press the 'Next' button on the lower left to continue. If you wish to use an existing ODBC connection to your database instead of a registered ADO driver, select 'Microsoft OLE DB Provider for ODBC Drivers'.

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

Step 5

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

If you selected a SQL Server driver, you will need to enter the name of the Server (hostname or IP address) in the '1' box, as well entering the username and password for the 'sa' (or equivalent) account in the '2' box, and finally use the drop-down menu under the '3' item to select the database instance within the SQL Server that you will link to. If you have selected the ADO Provider for ODBC Connections, under 'Use Data Source Name' there will be a drop-down menu showing all available ODBC connections, and you may select the one that is configured for the database you wish to link to.



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

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

WHEN SUPPLYING AUTHENTICATION INFORMATION IN THIS WINDOW, PLEASE NOTE THAT ASURE ID'S ABILITY TO ACCESS TABLES, FIELDS, AS WELL AS READ AND WRITE FROM THE DATABASE WILL BE GOVERNED BY THE PERMISSIONS GRANTED TO THE USER NAME THAT IS SUPPLIED FOR AUTHENTICATION. IF YOU ARE USING A 'READ ONLY' ACCOUNT, ASURE ID WILL BE UNABLE TO WRITE NEW RECORDS INTO THE LINKED DATABASE. SYNERCARD RECOMMENDS THAT YOU USE AN ADMINISTRATOR ACCOUNT WITH FULL DATABASE ACCESS WHEN CONFIGURING THE AUTHENTICATION INFORMATION.

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.

Step 6

After entering in the correct authentication information, check the 'Allow Saving Password' box before you continue.

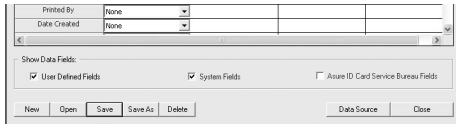
Step 7

When you have made the appropriate database and authentication settings, press the 'Test Connection' button to test the settings. If you see a message stating that the database connectivity tests were successful, you have made the correct settings, and can press 'OK' to save the database configuration and close the window.

You have now successfully selected and authenticated your database for Live Link operations, and may move on to the next section – Mapping Fields.

Section 2 – Mapping Fields

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

The screenshot shows a software window titled 'Data Link Properties'. At the top, there are two rows: 'Printed By' with a dropdown menu set to 'None', and 'Date Created' with a dropdown menu set to 'None'. Below these is a search bar with a magnifying glass icon. Underneath is a section labeled 'Show Data Fields:' containing three checkboxes: 'Use Defined Fields' (checked), 'System Fields' (checked), and 'Asure ID Card Service Bureau Fields' (unchecked). At the bottom of the window are buttons for 'New', 'Open', 'Save', 'Save As', 'Delete', 'Data Source', and 'Close'.

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

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

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

Important Note on Primary Keys

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

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

Step 1

Now that we have examined the different field types, let's perform the linking. Start by checking User Defined Fields as well as System Fields.

Step 2

As discussed above, it is extremely important to ensure that the primary key is linked before we apply a Live Link configuration, so we should start with this field. If your card template has a custom primary key field set by the designer, locate this field in the list, otherwise, begin with the RecordID system field.

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

The screenshot shows the 'Live Link' window with the following configuration:

- Template: ITG
- File Path: <New Live Link Configuration>
- RecordID: Operator is set to 'None'.
- Status: Operator is set to 'Database'.
- Date Voided: Operator is set to 'None'.

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

The screenshot shows the 'Live Link' window with the following configuration:

- Template: ITG
- File Path: <New Live Link Configuration>
- RecordID: Operator is 'Database' and Table/Path is 'A_ITG'.

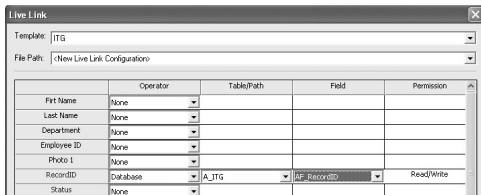
Step 3

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

The screenshot shows the 'Live Link' window with the following configuration:

- Template: ITG
- File Path: <New Live Link Configuration>
- RecordID: Operator is 'Database', Table/Path is 'A_ITG', and Field is 'AF_RecordID'.

After you have selected the field, the final column, marked 'Permission' will update to show you the database permission you have for the selected field within the external database. 'Read/Write' means you have full control within the field, while 'Read Only' means that you cannot write new values into the field.



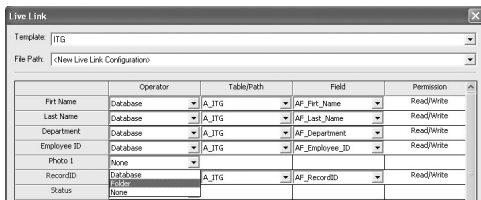
We have now configured the first field for Live Link! All other fields will be configured in the same manner, that is: Select the Operator, then the Table, and then the Field. This procedure allows any of Asure ID's template fields to be linked intuitively to an external database. Within a given Live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

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

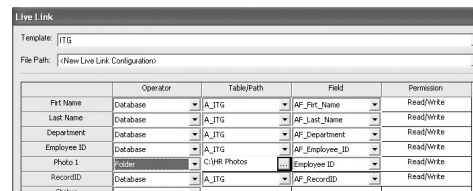
Step 4

The 'Folder' Operator

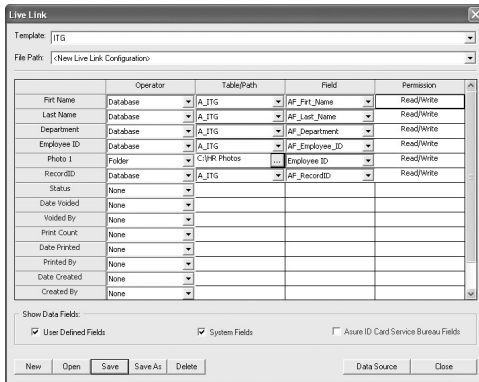
The only difference you may encounter from the above procedure is with the 'Folder' option found on the Operator column. As stated above, this option may be used for image fields – that is photograph, signature or biometric images. The purpose for this operator is to allow the storage of image files within a file folder instead of a database. If you select Folder for an image field, you will have a '...' button in the Table/Path column that can be used to browse for a folder in which to store the files.



Additionally, when selecting a Folder operator, the Field column will refresh to show all of the template fields – since Asure ID needs to know the filename of the image file to use for each database record, you will need to supply a template field that will provide the naming convention of your image files. For example, if the image files will have the same name as the Employee ID for a given cardholder, select this field in the Field column. This naming convention will also be used when storing new images files to the folder, so ensure that you choose a field that will contain a unique value for each cardholder.

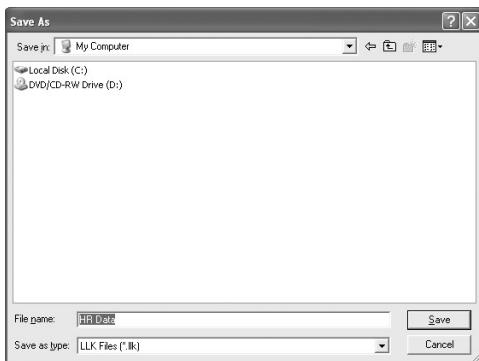


Once you have linked all of the fields you wish to use, the Live Link configuration window should look something like the screenshot below.



Step 5

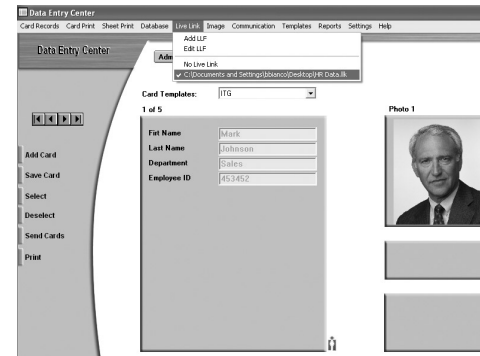
Once you have configured the linking in the manner you desire, press the 'Save' or 'Save As' buttons to save your configuration. Once it is saved, you can press the 'Close' button to exit the Live Link configuration window.



Activating A Live Link Configuration

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

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



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

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

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