

ASURE ID™
Connect ^{Version}
4.0
QuickStart Guide



Use this handy booklet to help get you up and running with **Asure ID Connect** in no time at all.

Asure ID Connect™ is the revolutionary FREE photo ID software that allows small organizations to easily design their own photo ID cards and have them securely sent via the Internet to an Asure ID Card Service Bureau in a “ready to print” format.

Affordable For Any Size Of Company.

Until Asure ID Connect, smaller organizations were unable to justify the cost of using photo ID cards. Now, with free software and a "pay as you print" approach to photo ID cards, any company can affordably implement a card program.

Big Security For Smaller Organizations.

Asure ID Connect puts the ability to produce photo ID cards in the hands of all organizations and contributes to more effective security systems. It can also open up a long list of other card application possibilities.

Any Questions? Contact Synercard Customer Support Team

Calling from within North America: **1-877-ASURE ID**,
when prompted by the voice attendant press the number 5

Calling from outside North America: **1-819-777-6687**,
when prompted by the voice attendant press the number 5

Fax: **1-819-777-8114** Email: **support@synercard.com**
Web: **www.synercard.com/online_support.htm**

Thank You For Choosing Asure ID Connect... 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 Connect software working for you. This guide is divided into the following six sections:

- 1. Minimum System Requirements**
- 2. Installing Asure ID Connect**
- 3. Registering Asure ID Connect**
- 4. A Step-By-Step Tutorial**
 - Designing A Card Template
 - Creating A Cardholder Record
 - Registering A User With An Asure ID Card Service Bureau
 - Sending A Card Template And Card Data To An Asure ID Card Service Bureau
- 5. Adding Enhanced Security And Transaction Status Capability With A Smart Card.**
- 6. What To Do Later If You Want To Produce Cards At Your Location?**

Full Asure ID Connect 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 Connect.

Section 1 Minimum System Requirements

- 233Mhz MMX Intel or, AMD CPU
- 32MB RAM (64MB recommended)
- 2MB Video Card
- SVGA Monitor at 800 x 600 resolution
- CD-ROM Drive
- Microsoft Internet Explorer 5.5 SP1
- MS Windows 95 (requires MS Winsock 2.0 Update) or,
- MS Windows 98 or,
- MS Windows NT4.0 (requires Service Pack 6a or higher) or,
- MS Windows 2000 (requires Service Pack 2) or,
- MS Windows ME or,
- MS Windows XP
- Internet connection (used for communication with Asure ID Card Service Bureau (Asure ID Server))

Optional Requirements For Enhanced Security

USB port or Mini PS/2 Keyboard port and one available COM port (for smart card reader). See **Section 5: Adding Enhanced Security And Transaction Status Capability With A Smart Card.**

Section 2 Installing Asure ID Connect

To begin the installation, simply place the Asure ID Connect CD-ROM into your computer's CD-ROM or DVD-ROM drive. Within a few moments the installation will begin and guide you through the simple steps to install Asure ID Connect. For systems that have CD-ROM AutoPlay disabled, please begin the setup by launching Windows Explorer, and then running the setup.exe program found on the Asure ID Connect CD-ROM.

Depending on your operating system, setup may launch the **'Data Access Objects'** installation. If you see this package appear, please mark your acceptance of the license agreement, and press the **'Next'** button **twice** to install this package with its default options.

During the install procedure, you may see a dialog box appear telling you that an existing file is newer than the one being copied, and asking you if you want to replace the existing file anyway. Please ensure that you select 'No to All' if you see this message.

Congratulations!

You have successfully completed the Asure ID Connect installation.

Please note that you will not be able to use Asure ID Connect until you have rebooted, and completed the program registration and setup routine (which will automatically appear after you reboot).

Section 3 Registering Asure ID Connect

After the computer has rebooted, 'Asure ID Setup' ('starter.exe') will automatically launch, and guide you through the registration and setup process.

Please note that if you will have multiple computers running Asure ID Connect, it is important to enter the **exact same** company name for all of them.

The required serial number can be found on a sticker on the inside back cover of your Asure ID Connect booklet. Please ensure that you enter the serial number **exactly** as it is printed on the sticker.

When prompted by the software you may choose from two types of **optional** 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.

Section 4 A Step-By-Step Tutorial

Designing A Card Template

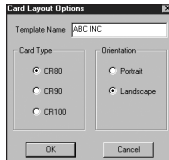
The Card Design Center is where you create templates for cards, either from scratch or by modifying existing templates. To fully appreciate the powerful features of the Card Design Center, take a look at the simple steps involved with creating a new card template.

1 Launch the Card Design Center application by selecting the Card Design Center shortcut located on your Start Menu under **Programs\Asure ID\Connect\Card Design Center**. 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 set-up process and press 'Ok'.

2 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 appears asking you to specify the **'Template Name'** (We've used ABC INC for our example), **'Card Type'** and **'Orientation'** of the new card. For this tutorial, select **'CR80'** (credit card size—by far the most common card size in use today) for **'Card Type'** and **'Landscape'** for **'Orientation'**.



You should now 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.

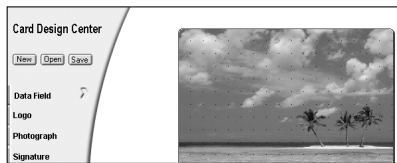


Edit the image by clicking on the **'Edit'** button. An **'Edit Image'** window will appear giving you the option to crop (selecting the area of image to be used) the image. To crop the image simply resize the crop selection frame over the portion of the image you wish to use as the background. When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

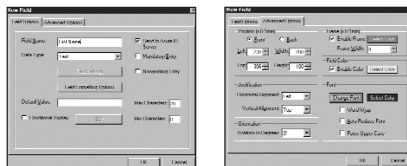


Repeat the steps in sections 4 and 5 to choose a background color or image for the back of the card if required.

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

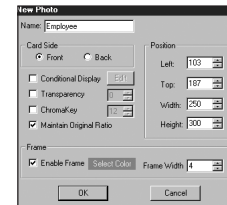


Within the **'New Field'** dialog box that appears, you will see a field titled **'Field Name'**. In this area, type the field name; in this case we will use **'First Name'**. Browse through the rest of the fields on both the **'General'** and **'Advanced'** tabs and try to replicate the options shown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

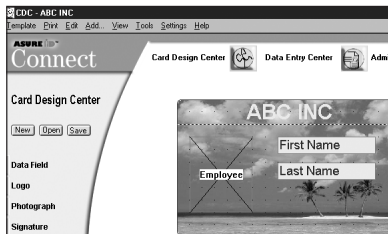


Add another data field and repeat the steps in section 6 and 7 but instead of **'First Name'** type **'Last Name'** into the **'Field Name'** area.

Add a field for a photograph by pressing the **'Photograph'** button and positioning the cursor on the front side of the card. Name our 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 with the selections, click **'OK'** to set the field on the card.



10 To finish our card template let's add a label titled ABC INC to the front of the card by clicking on the **'Data Field'** button and positioning the cursor on the front side of the card. From within the **'New Field'** dialog box choose **'Label'** from the **'Data Type'** dropdown list. A **'Label'** dialog box will appear and allow you to type in **'ABC INC'**. When you are finished, press the **'OK'** button. Choose an appropriate font size by clicking the **'Font'** button and then center the words in the new field. When you are satisfied with your field choices click on the **'OK'** button.



11 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

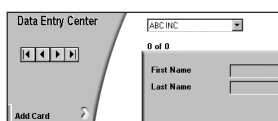
Data Entry Center is the part of Asure ID Connect that you will use most often. This is where the individual cardholder's photograph, signature, biometric and personal data are captured, and added to the card template's database.

12 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.

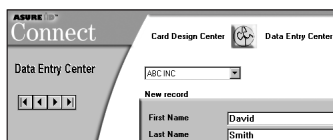
13 You first must select the **'Card Template'** that you want to use. Asure ID Connect provides you with pre-designed templates, and any that you have created in the Card Design Center are available as well. Select the **'ABC INC'** template from the drop-down **'Card Template'** menu at the top of the Data Entry Center main screen.



14 After you have selected the template, click on the **'Add Card'** button.



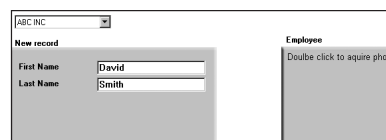
15 Simply click in each field and type in the appropriate data.



16 Next, click on **'Image'** on the main menu bar at the top of the screen and select **'Select Twain Source'** to configure your camera. From the **'Select Source'** window highlight the source you would like to set as the default photograph capture device and then press **'Select'**.



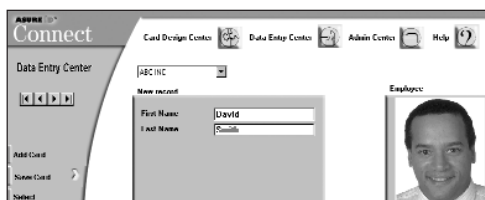
17 Once your camera (or scanner) is configured, double click within the large Photograph area in the upper right corner of the Data Entry Center window to capture the photo of your cardholder.



18 After you load (from file) or capture the photograph (from your TWAIN camera or scanner), 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'**.



19 When you have filled out 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.



20 We can see what the finished card will look like by selecting **'Print'** from the main drop-down menu, and then choosing **'Print Preview/This Card'**.



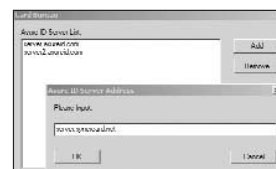
Registering A User With An Asure ID Card Service Bureau

Now that you have finished designing your card template and have used Data Entry Center to add some card records, you will find that registering a user with an Asure ID Card Service Bureau is just as simple as everything else about Asure ID Connect!

By using the Internet to securely transfer card data in a **'ready to print'** format to an Asure ID Card Service Bureau, Asure ID Connect puts the ability to produce photo ID cards in the hands of all companies and contributes to more effective security systems.

21 From within the Asure ID Connect 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.

22 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'**.



You may find the IP address or URL of your Asure ID Card Service Bureau on a sticker on the bottom of the back cover of this Asure ID Connect booklet.

If you have not already been in contact with an Asure ID Card Service Bureau, please contact Synercard by phone, fax, email or through our online customer support to obtain the contact information of the Asure ID Card Service Bureau nearest you.

*Calling from within North America: **1-877-ASURE-ID**, when prompted by the voice attendant **press the number 4***

*Calling from outside North America: **1-819-777-6687**, when prompted by the voice attendant **press the number 4***

Fax: 1-819-777-8114

Email: sales@synercard.com

Web: www.synercard.com/online_support.htm

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 in sending card data.

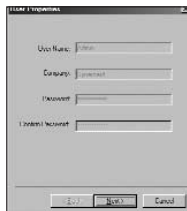
23 To register a user, simply click on that user's name to highlight it (for this example select the **'Admin'** user), and then press the **'Register User'** button on the left hand side of the main **'Admin Center'** screen.



24 A confirmation window will appear confirming the user name you are about to register, press **'OK'** if you are certain you want to proceed.



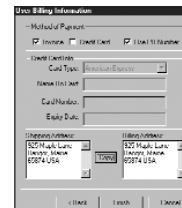
25 You will now see a **'User Properties'** dialog box containing the company name and password you filled out for the Admin user during the installation and setup procedure. Confirm this is the user account you would like to register and press **'Next'** to move to the **'User Contact Information'** dialog box.



26 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.



27 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 **'OK'** to register.



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

That is all there is to registering a user with and Asure ID Card Service Bureau.

Sending A Card Template And Card Data To An Asure ID Card Service Bureau

From within the Data Entry Center you will need to select the template to be sent to the Asure ID Card Service Bureau.

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

29 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.



30 Within a few seconds (depending on the template file size and the speed of the Internet connection) you will get a confirmation receipt on the screen, which you may discard or print for later reference.

You now have several options when sending card data to the Asure ID Card Service Bureau which are as follows: **'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.

31 You can 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.

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 the 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 further reference (see **'Transaction Status Center'** in the Online and Offline **'Help'** provided with Asure ID Connect). 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 all your photo ID card production and see for yourself why using Asure ID Connect really does mean peace of mind.

Card prices may vary from Asure ID Card Service Bureau to Asure ID Card Service Bureau.

Section 5 Adding Enhanced Security And Transaction Status Capability With A Smart Card

Did you know that you can enhance the security and add transaction status capabilities to Asure ID Connect by purchasing a smart card and smart card reader from your Asure ID Card Service Bureau (Synercard Partner)?

It's easy to install and means that Asure ID Connect users can benefit from technology that brings secure communication to the next level, ensures secure log-on to the software and allows users to connect to their Asure ID Card Service Bureau to get real time information about the status of their card transactions.



Contact your Synercard Partner or a member of Synercard's Sales Team directly for information on how to purchase and install a smart card and smart card reader for use with Asure ID Connect.

Section 6

What To Do Later If You Want To Produce Cards At Your Location?

Upgrading to Asure ID Express™ and Asure ID Enterprise™ has never been easier, allowing user who's card demands and system requirements may change, a way to easily upgrade their software without the hassles and expense of learning new products or re-inputting data. Both Asure ID Express and Asure ID Enterprise work with most all Windows compliant card printers and provide easy to use tools for even the most demanding card applications. With the same look and feel as Asure ID Connect you'll hardly notice you're using a different product.

Contact your Synercard Partner or a member of Synercard's Sales Team directly for information on how to upgrade from Asure ID Connect to Asure ID Express and Asure ID Enterprise.

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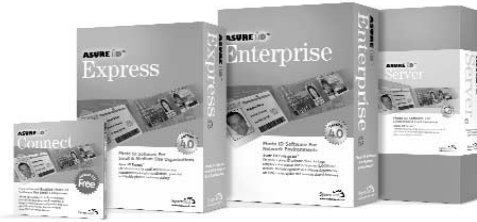
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Printed in Canada



**Asure ID Connect Was Designed To Be
Photo ID Software That Comes
With Many Valuable Features.
What It Doesn't Come With Is A Price.**

The Asure ID Family of Products™ offers a complete line of Internet enabled photo ID software products that are simple to learn, more powerful, loaded with useful features and flexible enough to improve the issuance of advanced photo ID cards for virtually any size and any kind of enterprise.

Asure ID Connect™

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Asure ID Server™

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