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USER GUIDE

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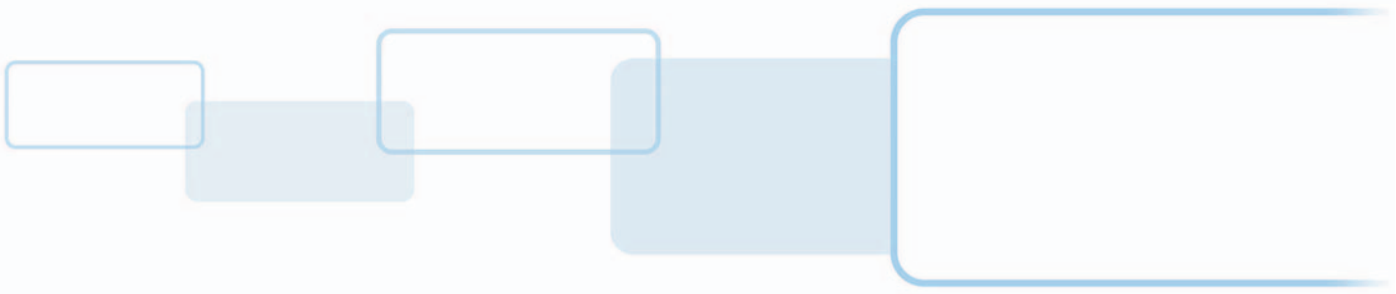

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Revision history

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July 2017	Updated screen captures and hyperlinks	2.4
May 2016	Updated to version 7.7	2.3
June 2015	Updated to version 7.6	2.2
December 2014	Added new features, CP1000 information, updated screen shots. New format for document.	2.1

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Section 1

1 Getting started

The Asure ID® User Guide covers the basics of the Asure ID user interface, installation, and configuration. For a more in-depth explanation of Asure ID, see the *Asure ID Reference Guide* (PLT-01797). This reference guide can be downloaded from the HID Global® web site **http://www.hidglobal.com/documents**.

1.1 Supported OS and database engines

	Solo	Express	Enterprise	Exchange	iCLASS SE® Encoder	Developers Edition	Developers Exchange Edition
Supported Operating Systems							
Windows 7 (32-bit and 64-bit) Windows 8 (32-bit and 64-bit) including Windows 8 Pro Tablets Windows 10 (32-bit and 64-bit)	All Asure ID Editions						
Supported Database Engines							
Microsoft Access (2000 and 2002/2003)	Native	Native, Live Link	Native, Live Link	Native, Live Link	Native		
SQL Server (2000, 2005, 2008, 2012, 2014, 2016, and 2017)			Native, Live Link	Native, Live Link	Native		
Networkable[1]			X	X			
MySQL (version 5)				Live Link			
Oracle (9i and 11g)				Native, Live Link	Native		
Microsoft Active Directory / LDAP				Live Link			
ODBC				Live Link			

1. Asure ID site license enable sharing of networked database information on multiple workstations.

1.2 System requirements

- 1 GHz or faster processor
- 1 GB RAM
- 1 GB available hard disk space
- Supported operating systems

1.3 Installation

The Asure ID installation files can be accessed in either of the following:

- The Asure ID CD. Insert the CD into the PC and follow the instructions.

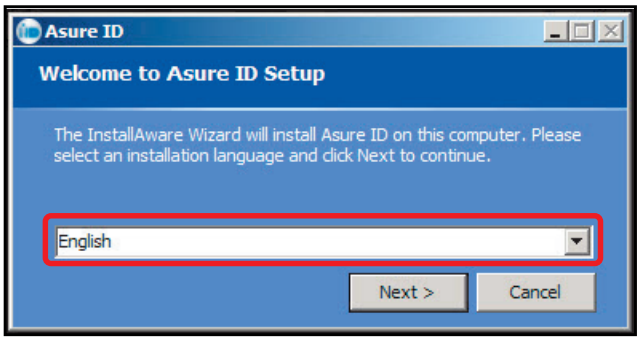
  Note: If the CD does not run automatically, browse to the **Setup.exe** file.

- Download the software from the HID Global web page, **www.hidglobal.com/AsureID**.

1.3.1 Installation wizard

1. The Installation Wizard opens and starts the installation.
2. Select a language from the pull-down list, and click **Next**.

   Note: To install the software in Indonesian you download/install the English version of Asure ID, then use the **Change Language** option to change the program to Indonesian. See *Section 2 The Options window*.

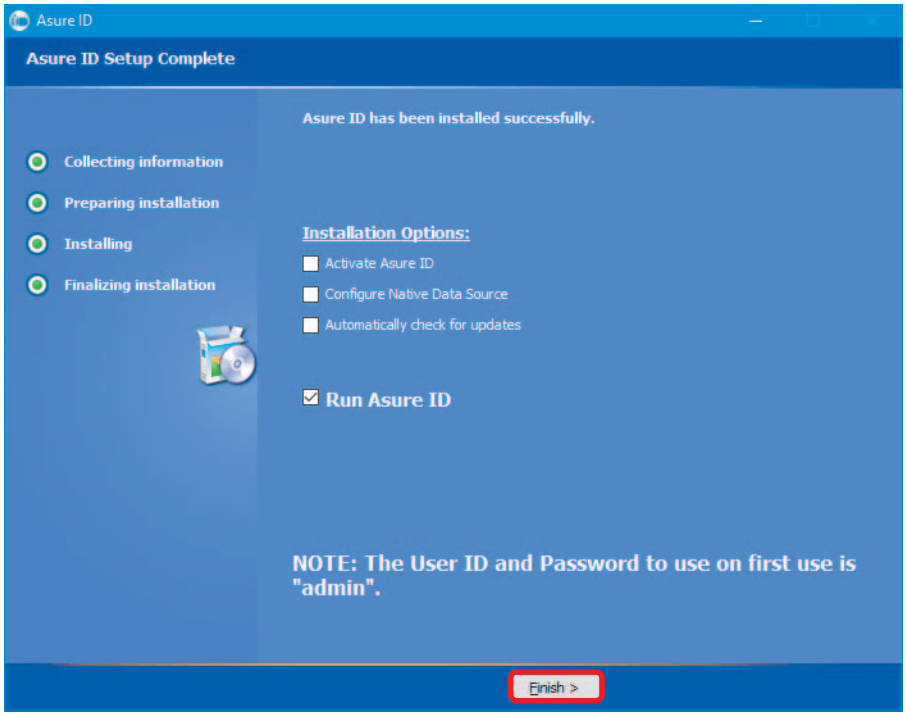


3. Read and accept the License Agreement, and click **Next**.
4. Select a folder to install the software, and click **Next**.
5. When installation is complete, Set the Installation Options:
   - **Activate Asure ID** – With a license key you can activate the Asure ID software. If this option is not selected, Asure ID is installed with a 30-day trial license. See *Section 1.3.2 Activate Asure ID*.
   - **Configure Native Data Source** – Allows you to configure the native data source which stores card templates and Asure ID system information. By default Asure ID sets the native source to an embedded Microsoft Access data source.

     Note: This option is recommended for installations where Asure ID is used on multiple PCs, where all template and reporting information needs to be consistent.

   - **Automatically Check for Updates** – Notifies you of product updates.

6. Click **Finish**.



1.3.2 Activate Asure ID

If **Activate Asure ID** is selected, Asure ID prompts you to enter the following information and the license key.

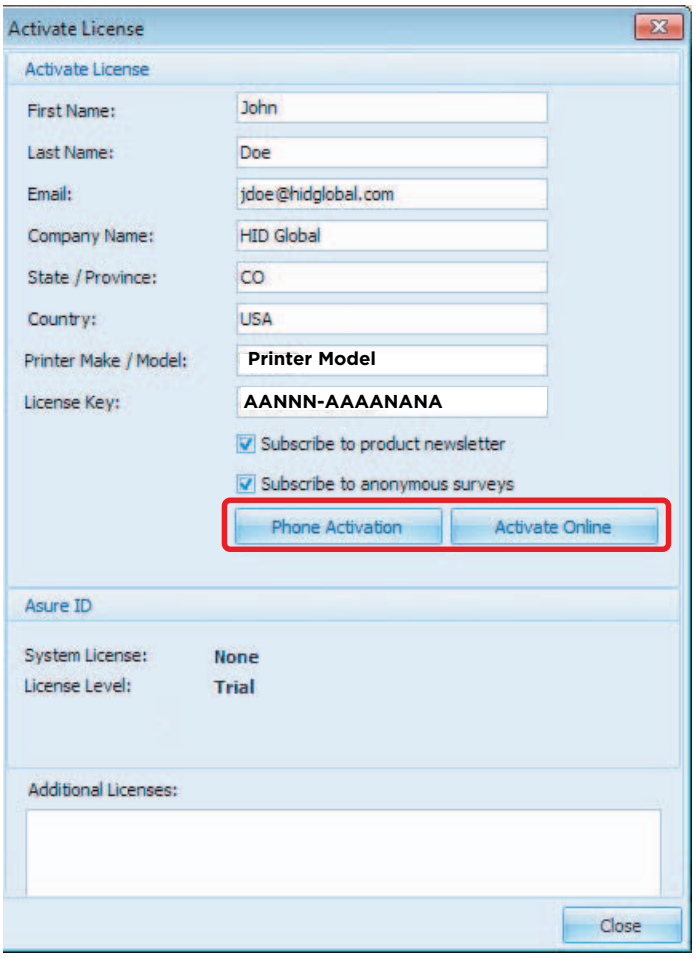
Note: The license key is located on the back of the CD case.

1. Click **Phone Activation** or **Activate Online**.

   Note: Online activation requires an Internet connection.

2. Click **OK**.

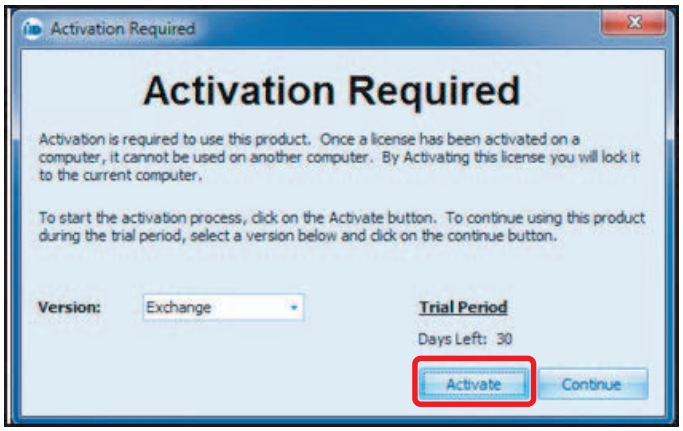
   Note: If **Phone Activation** is selected, you are directed to call a provided number and provide this information to HID Global.



1.4 Initial login

1. Open Asure ID by double-clicking the Asure ID icon.

Note: If the software has not been activated the Activation Required window opens. Select a version of Asure ID. Click **Activate**. For a 30 day trial version, click **Continue**.



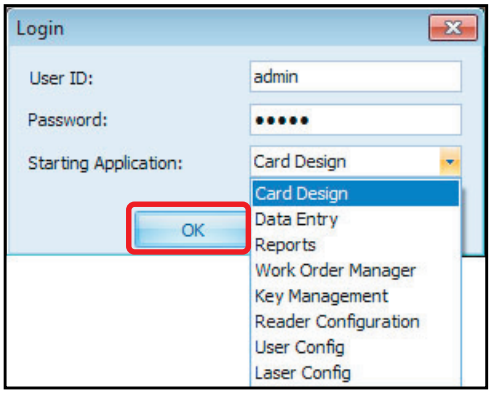
2. For Asure ID Express editions and above, enter:

   User ID: **admin**
   Password: **admin**

   Note: Asure ID Solo users are not required to enter a user ID or password.

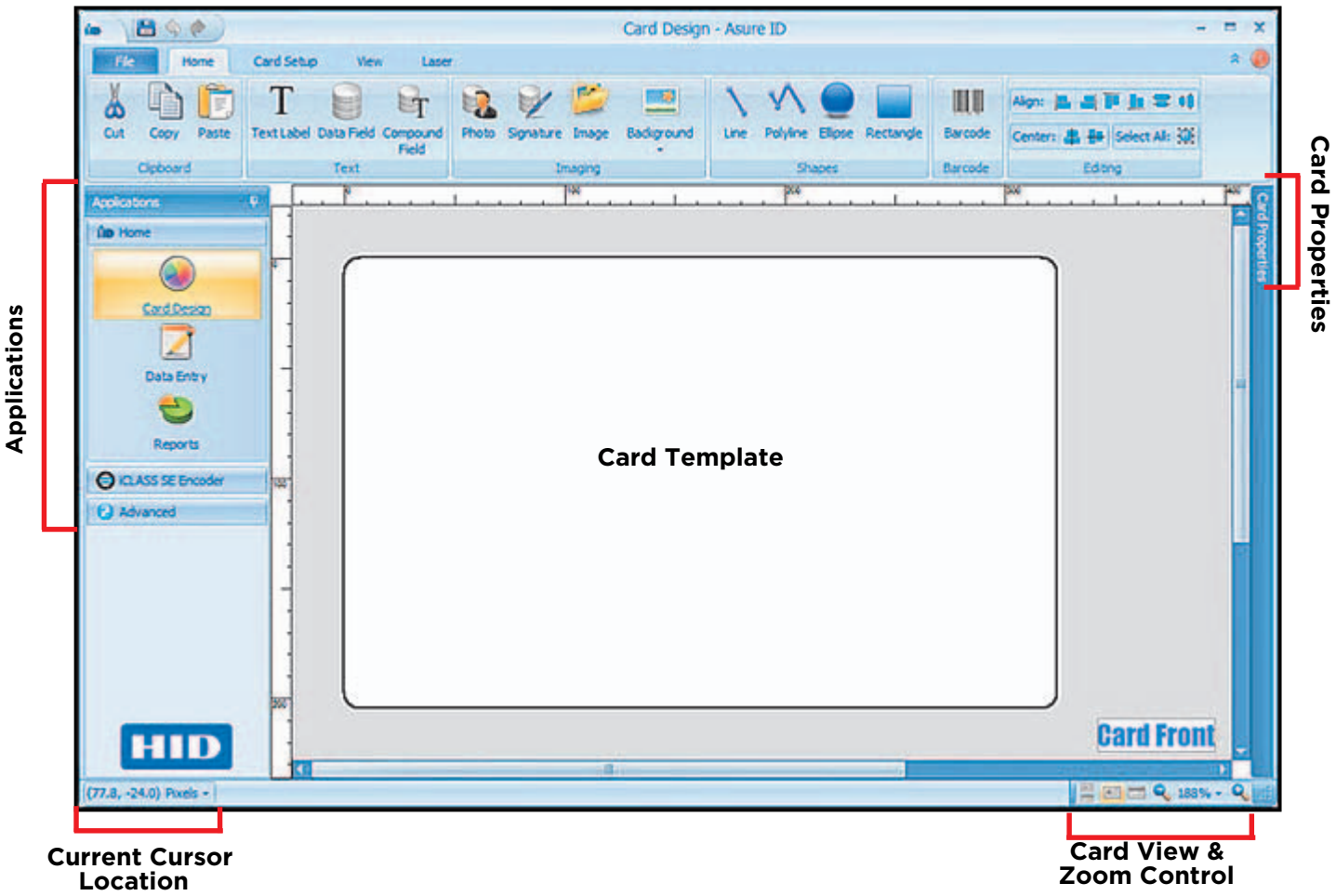
   Note: To identify the Asure ID edition purchased, see the Licensing window (**File** > **Options** > **Licensing**). The edition is displayed under the Asure ID section with the license key.

3. You can modify the Starting Application option if needed.
4. Click **OK**.



1.5 Window layout of Asure ID

With each Application that is selected there is a corresponding set of tabs, tools and display screens. Each of these Application windows are described in detail in the following sections.



Applications: This side panel contains all the applications modules used to design, create and manage security issuance cards. See *Section 1.5.1 Asure ID application modules*.

Card Properties: When accessed, the data fields of the cards (Data Field tab) as well as Smart Chip Applications (iDIRECTOR® tab) are displayed.

Current Cursor Location: The X/Y coordinates show the current position of the cursor. If rulers are displayed, the markers also show this position.

Card View & Zoom Controls

- **Card View:** You can toggle between showing both sides of the card and either front or back. These views are only enabled if the card is dual-sided.
- **Zoom Controls:** You can zoom in and out as well as set specific zoom levels.

1.5.1 Asure ID application modules

1.5.1.1 Home

- **Card Design** enables you to create a card template for each card type (for example, employee card, contractor or student).
- **Data Entry** allows you to add, modify, and delete card records, including acquiring photos and printing cards.
- **Reports** allows you to view standard reports (for example, user activity and template activity reports) and custom reports.

1.5.1.2 iCLASS SE encoder

The **iCLASS SE Encoder** application allows you to create work instructions and embed them into a template.

- **Work Order Manager**
- **Key Management**
- **Reader Configuration**

1.5.1.3 Advanced

- **User Config -** Allows you to manage user privileges and login credentials for Asure ID Editions of *Express* and above.
- **Laser Config -** Allows configuration of numerous laser settings.

Note: With the Asure ID internal database, you can store card templates and cardholder information.

Note: With Live Link, you can also print card data from external databases such as HR, security or ERP. The Live Link wizard sets up real time data exchanges with a few mouse clicks. At print time, Live Link accesses and delivers the data that populates the external data fields on each card. For detailed information on the Live Link, see the *Asure ID Reference Guide* (PLT-01797).

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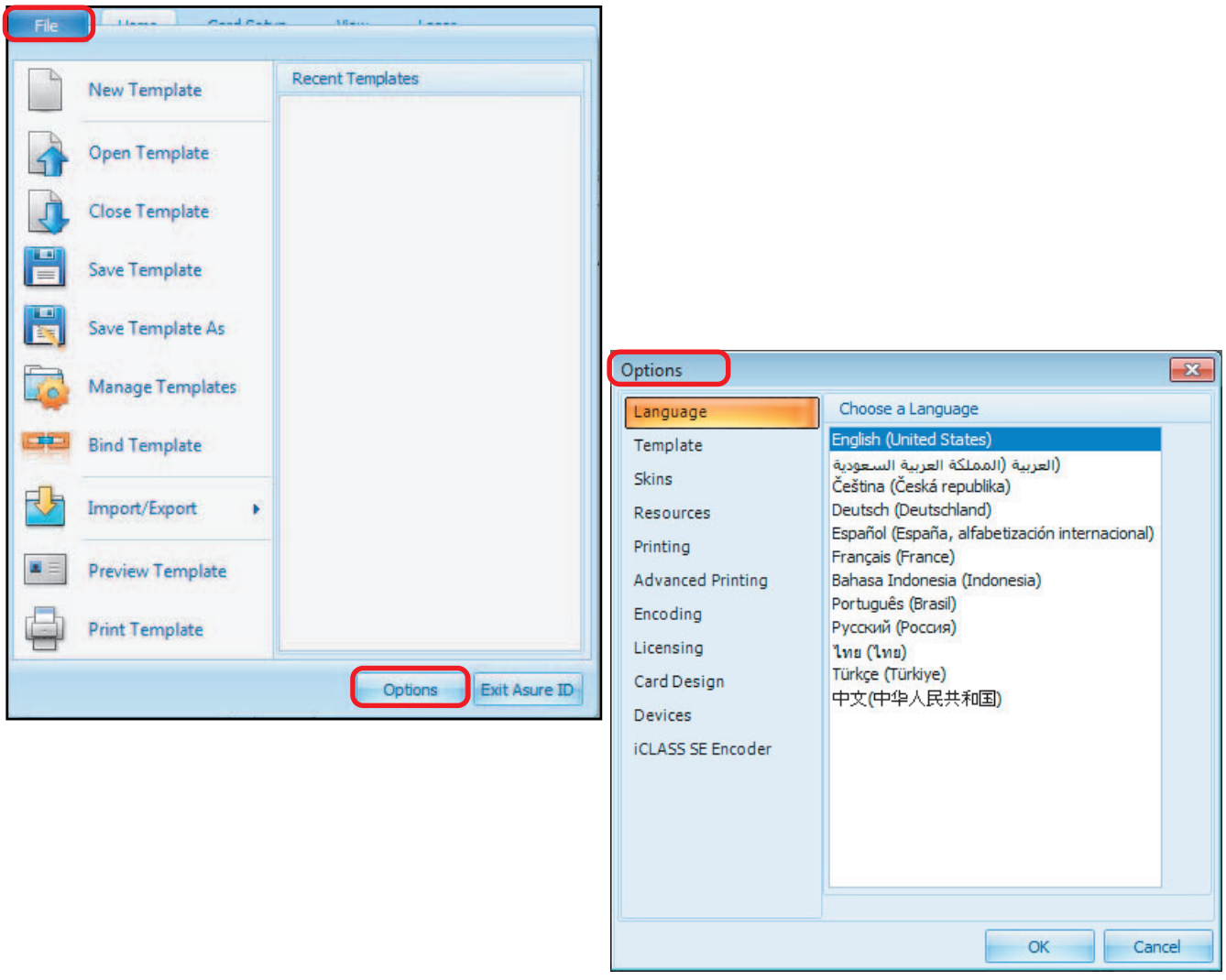
Section 2

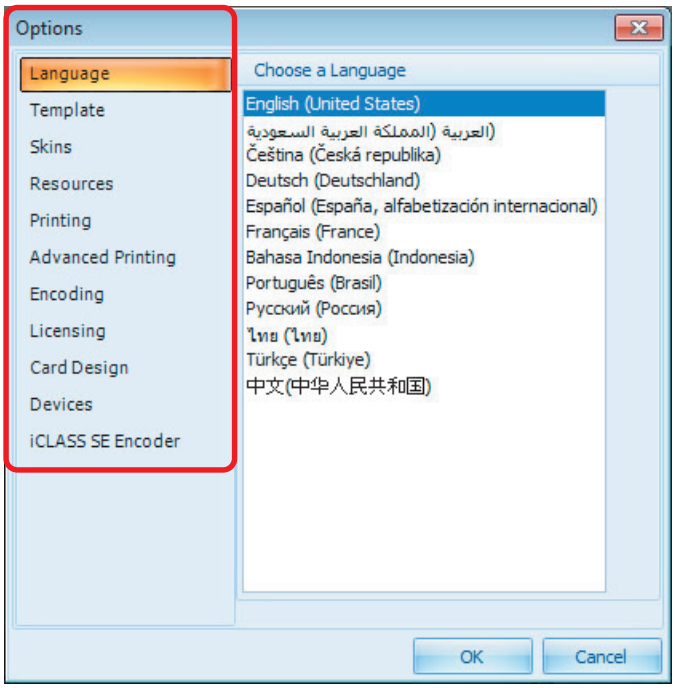
2 The Options window

The **Options** window is available on every **File** tab, and allows you to manage the iCLASS SE® Encoder Formats, Plugins, Database, Options, and User Options.



2.1 Configurable options

The Options window has the following configurable sections. For detailed information on each option, see the *Asure ID Reference Guide* (PLT-01797).



- **Language:** Allows you to set the default language of the application.
- **Template:** Allows you to set the basic template options for the Asure ID application.
- **Skins:** Allows you to customize the look of the Asure ID application by selecting a predefined skin.
- **Resources:** Allows you to access resource information for the application.
- **Printing:** Allows you to define all of the printing options for the application.
- **Advanced Printing:** This option is used to configure the printer chip encoding and magnetic encoding command sequences. The parameters auto-fill for the selected printer.
- **Encoding:** Allows you to manage all the encoding settings within the printer.

  Note: There is a desktop encoder available, that allows you to encode cards with a separate device.
- **Licensing:** Allows you to view, modify, and activate the licensing information of the Asure ID application.
- **Card Design:** Allows you to set the Card Design default settings for the text labeling, field formatting and compound field formatting.
- **Devices:** Allows you to select from available Photo and signature devices.
- **iCLASS SE Encoder:** Allows you to modify iCLASS SE Encoder options on the Asure ID application.

  Note: This option has multiple tabs; Format, Plugins, Database, Options, and About.

Section 3

3 Card Design application

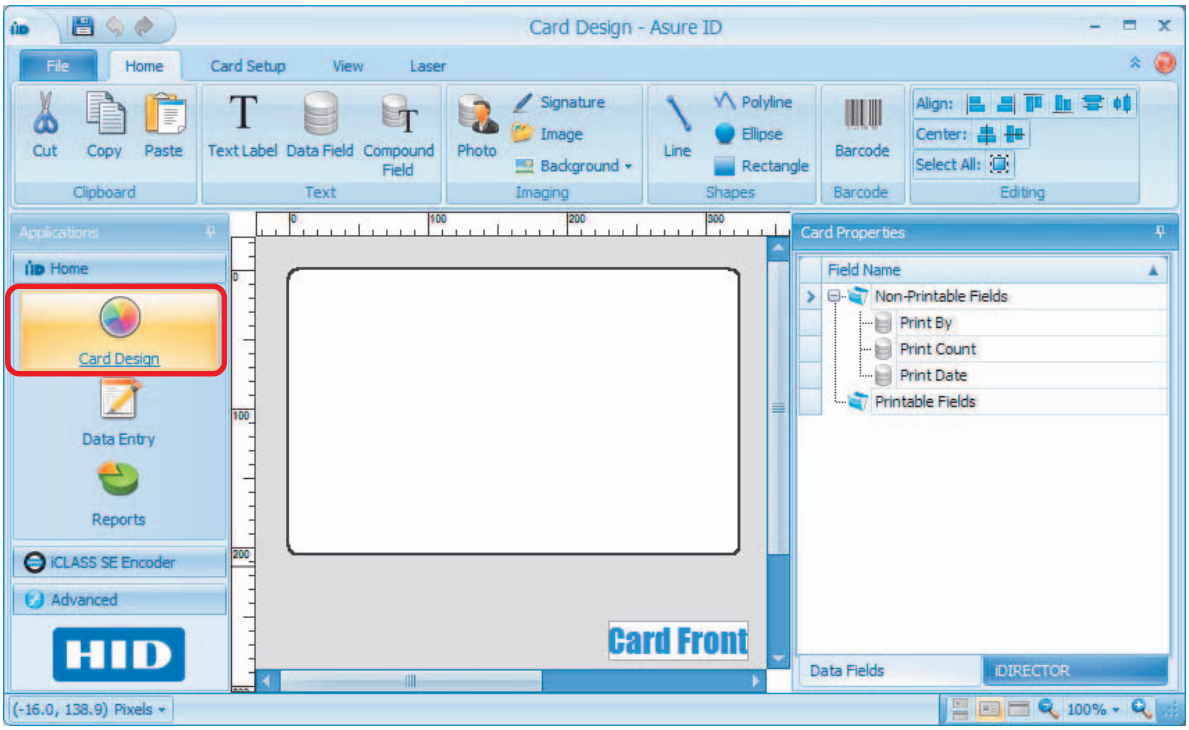
The Asure ID **Card Design** application allows you to:

- Lay out and design a card template.
- Add technologies, including a barcode.
- Personalize the work environment, including adding and removing grid lines and rulers as well as modifying the card view, orientation, zoom level and properties.
- Link data fields to external data sources.
- Save, edit and export work.

The **Card Design** application is used to create the card layout for printing and encoding. Each card layout is saved as a template for use by the **Data Entry** application.

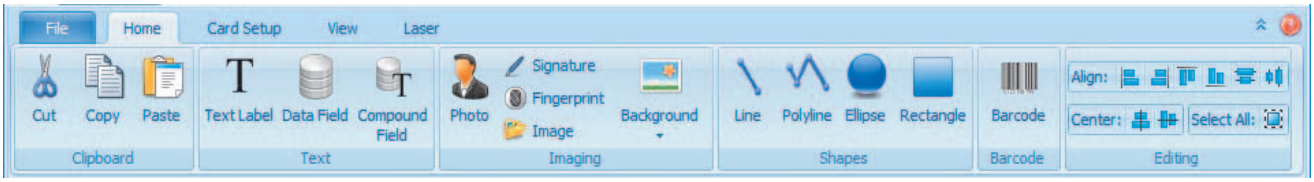
Important: After the template is saved with the links to the data source, you cannot add additional fields. The existing fields can be modified, but if a new field is needed, a new template needs to be created.

For detailed information on the **Card Design** application, see the *Asure ID Reference Guide* (PLT-01797).



3.1 Card Design overview

The **Card Design** application has the following tabs, with a corresponding toolbar.



- **File:** This tab allows you to perform template operations.
- **Home:** This tab contains all the tools to create/modify a card template.
- **Card Setup:** This tab displays the current card layout, and additional tools for card configuration.
- **View:** This tab allows you to display and modify the current view.

3.2 Basic Card Design tutorial

The tutorial walks through the process of creating a basic ID card. From this example, you should be able to create their own templates, import data, and print cards.

The basic **Card Design** is as follows:

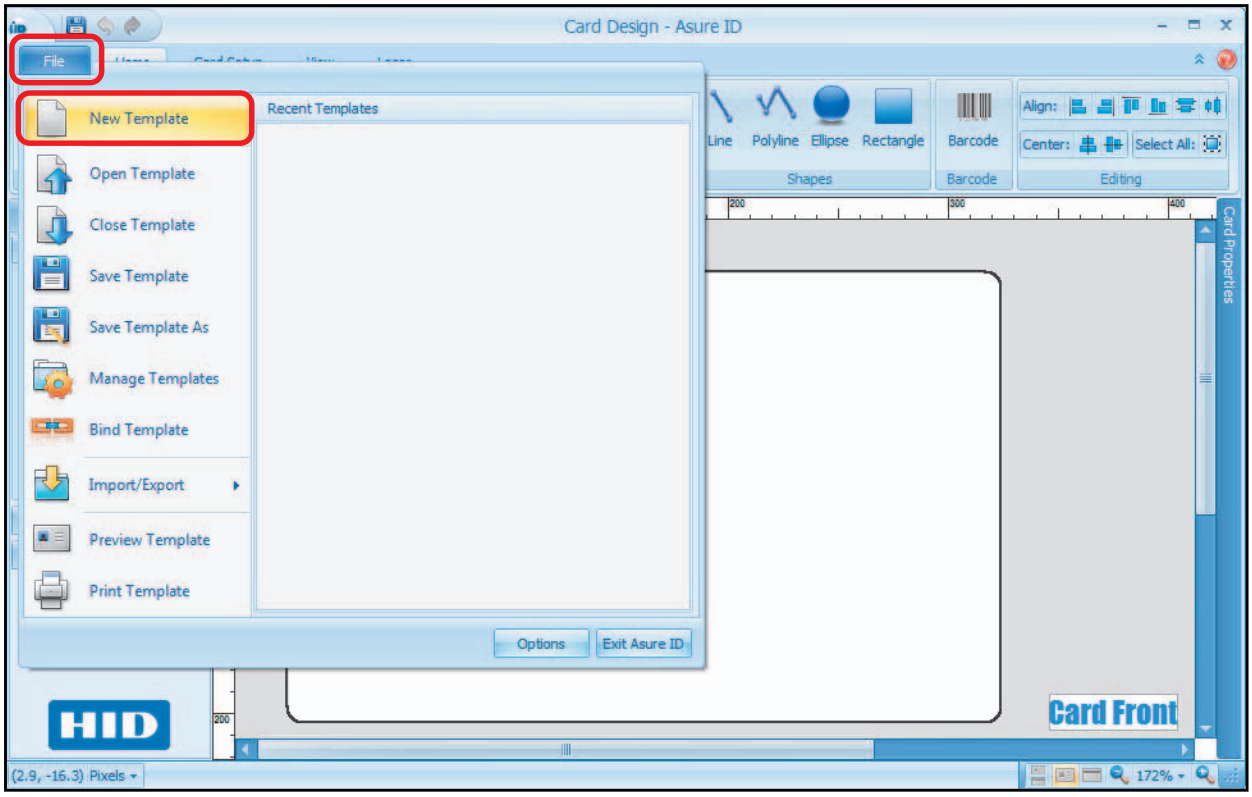
- *Section 3.2.1 Create a template*
- *Section 3.2.2 Add a text label (company name)*
- *Section 3.2.3 Add a data field (employee number)*
- *Section 3.2.5 Compound field (last name, first name)*
- *Section 3.2.6 Add a photo*
- *Section 3.2.8 Add image (logo)*
- *Section 3.2.7 Add a signature*

Additional capabilities, such as magstripes, barcodes and Smart Chips are covered in *Section 3.3 Advanced card design tutorial*.

3.2.1 Create a template

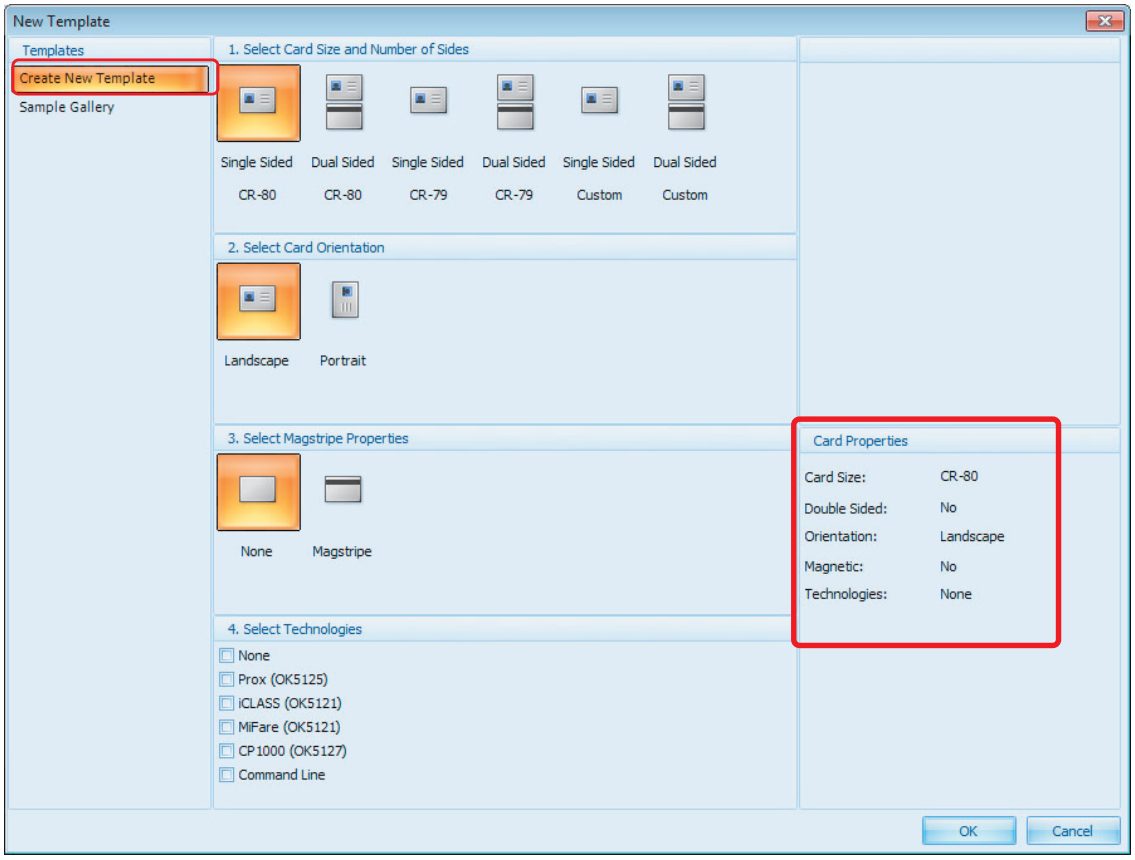
Note: For detailed information on **Card Design** see the *Asure ID Reference Guide* (PLT-01797).

1. Select **Card Design** applications > **File** tab > **New Template**.



2. Select **Create New Template**.

   Note: Selections are indicated with an orange background and selected options are displayed in the **Card Properties** pane.



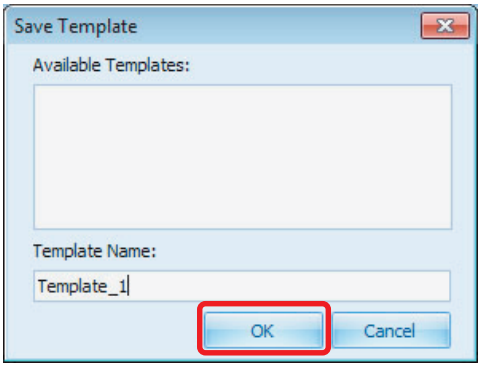
3. The window displays each step to create a new template. Set the following options:

Field	Setting
Select Card Size and Number of Sides	**Single Sided CR-80**
Select Card Orientation	**Landscape**
Select Magstripe Properties	**None**
Select Technologies	**None**

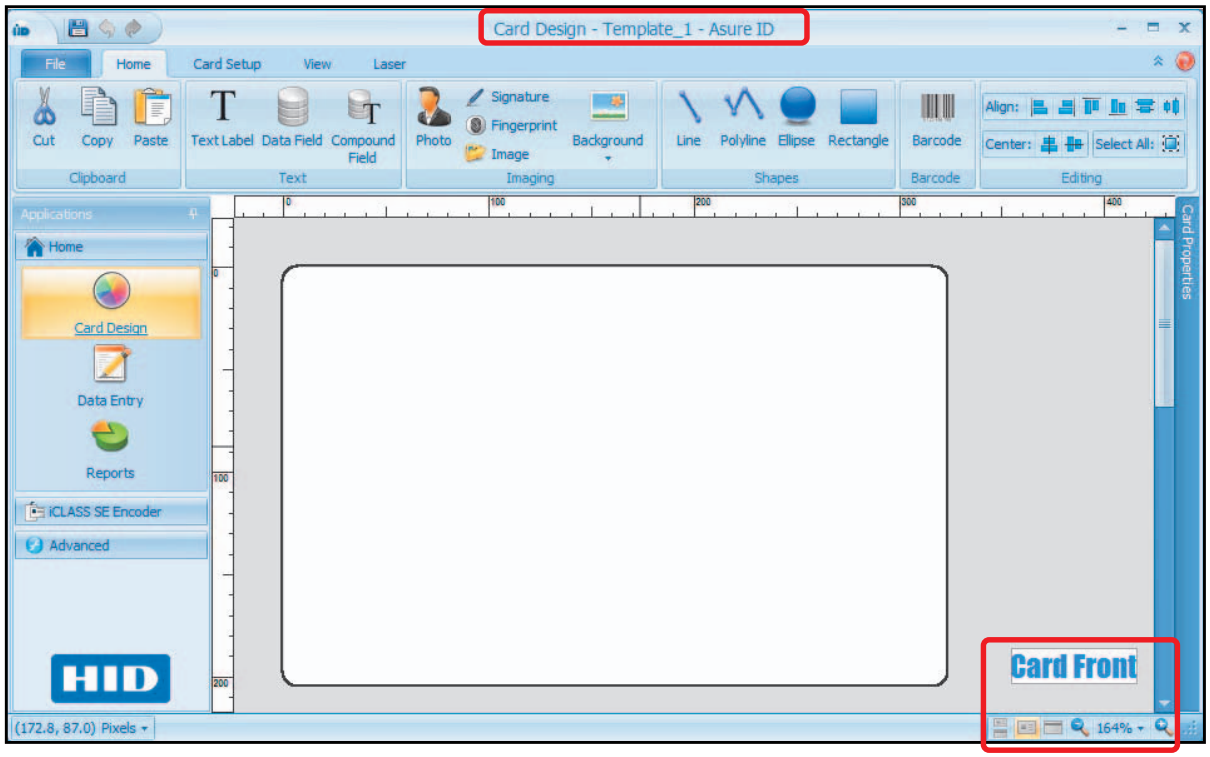
   Note: The selected options are displayed in the **Card Properties** pane.

4. Click **OK**. The new template opens in the display window.

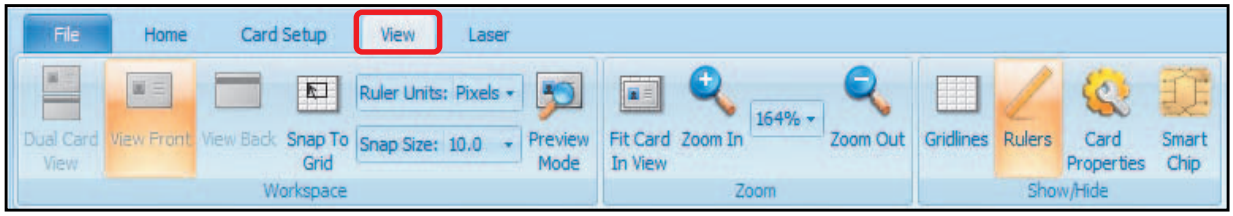
5. Select **File** tab > **Save Template**. Enter a Name for the template and click **OK**.



6. The template name displays on the top of the window, and the card information and view controls are at the bottom of the window.



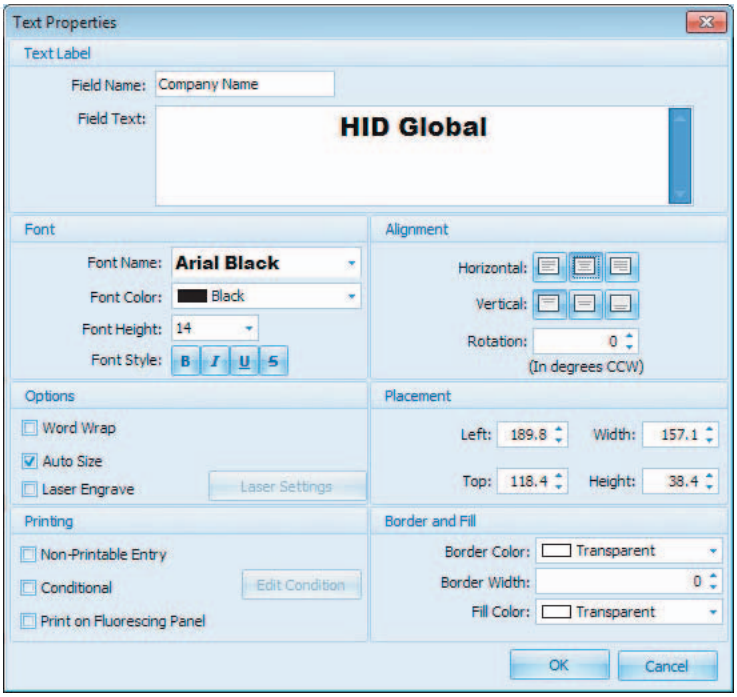
Note: You can adjust the view displayed from the **View** tab options.



3.2.2 Add a text label (company name)

A text label prints the same on every card. There is no data entry or database that feeds into this field. For this example a Company Name is added.

1. Select **Card Design** application > **Home** tab > **Text Label**.



2. Click in the **Card Display** pane to open **Text Properties** and set the following:

Field	Setting
Text Label	Define the field name and enter the text to display in this field. **Note:** The Field Name should be a name that can be associated to the actual field text. **Field Name:** Enter **Company Name** **Field Text:** Enter your company name (example is **HID Global**).
Font	Set the font options. In this example the following was set: **Font Name:** Arial Black **Color:** Black **Font Height:** 14 **Font Style:** No selection was made.
Alignment	Select alignment options. In this example both options were set as **Center**.
Options	Select the following options as needed. In this example **Auto Size** is selected. **Word Wrap** **Laser Engrave**

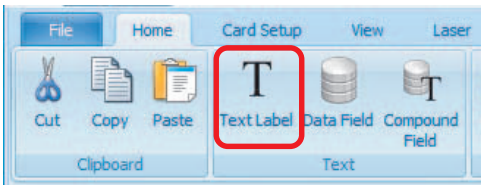
Field	Setting
Placement	Enter a specific location for the label. The text box can be moved using drag/drop.
Printing	Select the following options as needed. In this example no options were selected. **Non-Printable Entry, Conditional,** and **Print on Fluorescing Panel**
Border and Fill	Select the following options as needed. In this example the following was set: **Border Color:** Transparent **Border Width:** 0 **Fill Color:** Transparent

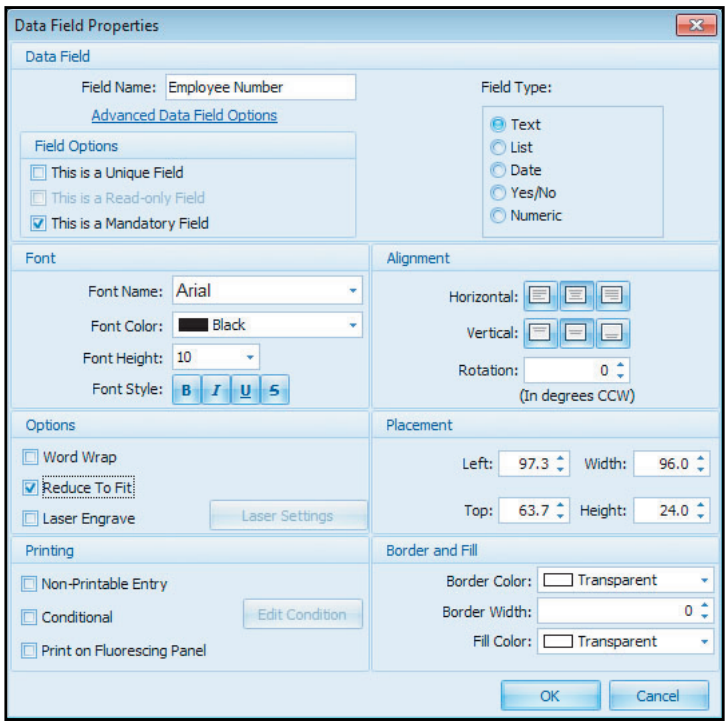
3. Click **OK** and **Save** (**File** tab > **Save Template**).

3.2.3 Add a data field (employee number)

The data field adds a unique data field to the card record (i.e. employee number). See *Section 4 Data Entry application* for information on populating the Data field.

1. Select **Card Design** application > **Home** tab > **Data Field**.



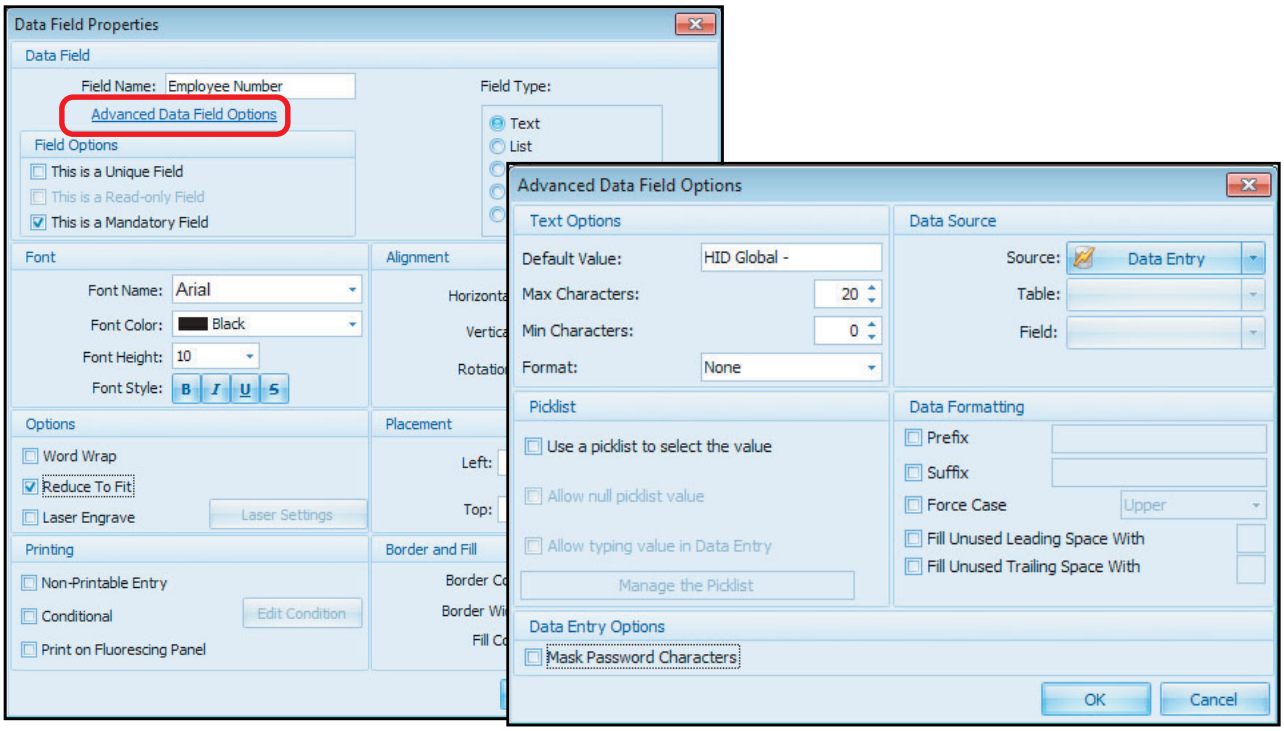


2. Click in the **Card Display** pane to open **Data Field Properties**, set the following:

Field	Setting
Data Field	Define the field name and enter the text to display in this field. **Note:** The Field Name should be a name that can be associated to the actual field text. **Field Name:** Enter **Employee Number** **Field Type:** Text **Field Options:** This is a Mandatory Field
Font	Set the font options. In this example the following was set: **Font Name:** Arial **Color:** Black **Font Height:** 10 **Font Style:** No selection was made.
Alignment	Select alignment options. In this example Both options were set as **Center**.
Options	Select the following options as needed. In this example the option **Reduce to Fit** is selected.
Placement	Leave whatever data is populated. The text box can be moved using drag/drop.
Printing	Select the following options as needed. In this example no options were selected. **Non-Printable Entry, Conditional,** and **Print on Fluorescing Panel**
Border and Fill	Select the following options as needed. In this example the following was set: **Border Color:** Transparent **Border Width:** 0 **Fill Color:** Transparent

3. Click **Advanced Data Field Options**.

   Note: The Advanced Data Field Options window shown below is for a Data Field that has the Field Type of **Text** selected. For information on other Field Types **Advanced Data Field Options**, see the *Asure ID Reference Guide Section 3 Card Design Application* (PLT-01797).

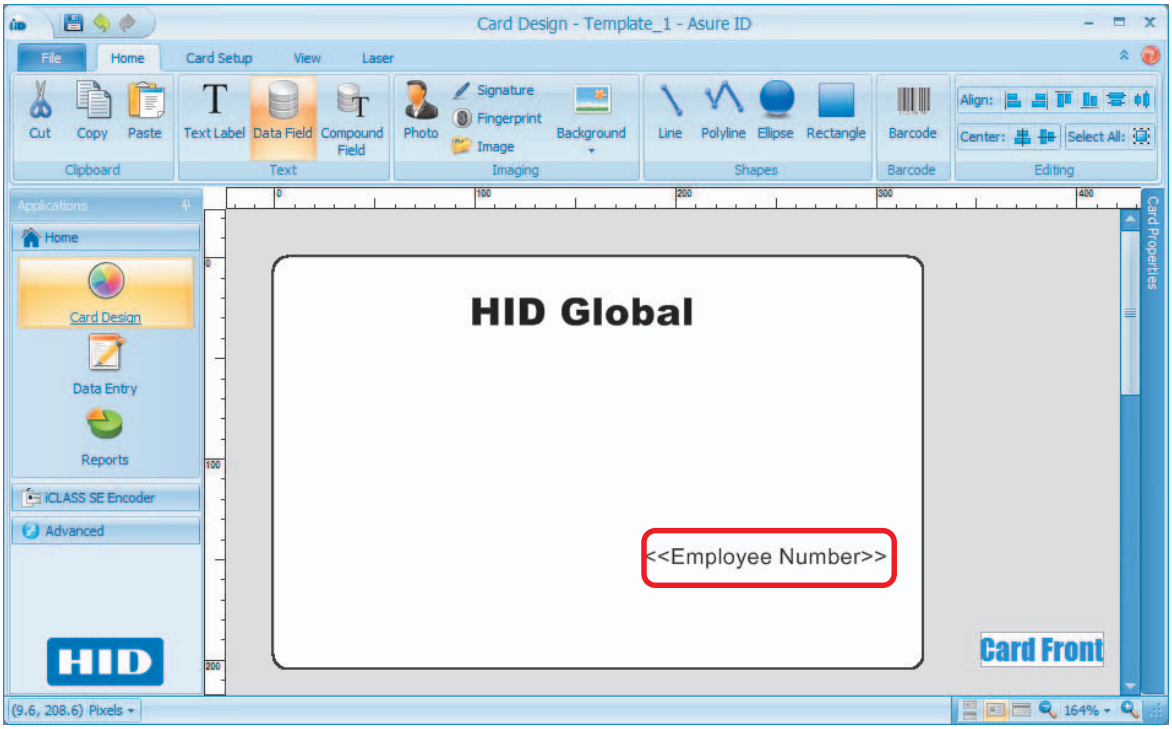


4. Set the following:

Field	Setting
Text Options	Set the following Text Options: **Default Value:** Enter a default value (in this example we entered **HID Global -**). This displays on all cards prior to any data entered during Data Entry. **Note:** This field is not required. **Max Characters:** 20 **Min Characters:** 0 **Format:** None
Data Source	**Source:** Data Entry
Picklist	No options selected.
Data Formatting	No options selected.
Data Entry Options	No options selected.

5. Click **OK** to close the window.
6. Click **OK** to close the **Data Field Properties** window.

7. The newly created Data Field can be positioned on the card, by simply selecting and dragging.

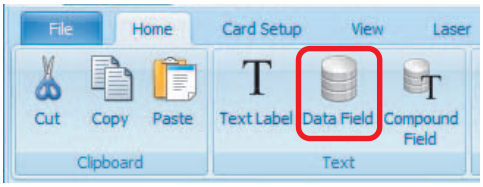


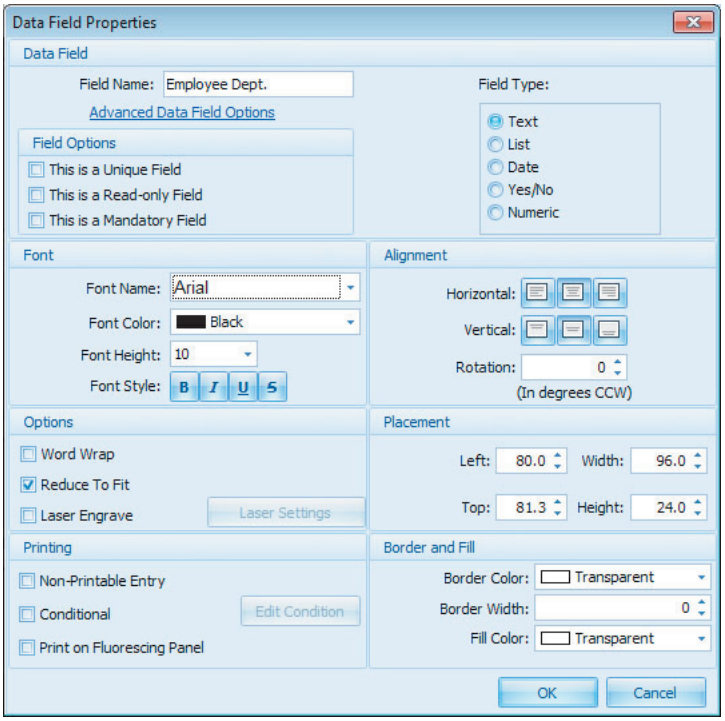
8. Select **File** tab > **Save Template**.

3.2.4 Add a data field picklist (employee dept.)

The **Data Field Picklist** allows you to select a requirement from a list. See *Section 4 Data Entry application* for information on populating the Data field.

1. Select **Card Design** application > **Home** tab > **Data Field**.





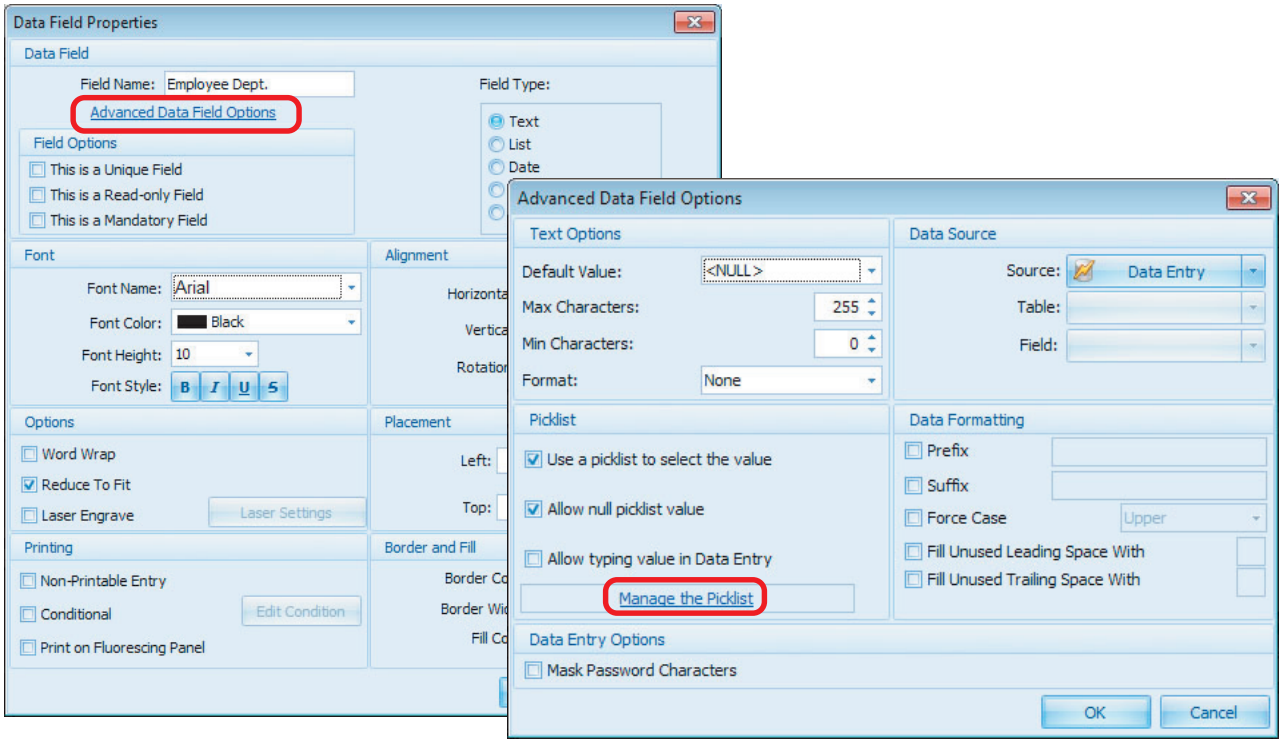
2. Click in the Card Display pane to open **Data Field Properties**, set the following:

Field	Setting
Data Field	Define the field name and enter the text to display in this field. **Note:** The Field Name should be a name that can be associated to the actual field text. **Field Name:** Enter **Employee Dept.** **Field Type:** Text **Field Options:** Do not select any options.
Font	Set the font options. In this example the following is set: **Font Name:** Arial **Color:** Black **Font Height:** 10 **Font Style:** No selection was made.
Alignment	Select alignment options. In this example Both options are set as **Center**.
Options	Select the **Reduce to Fit** option.

Field	Setting
Placement	Leave whatever data is populated. The text box can be moved using drag/drop.
Printing	Do not select any options.
Border and Fill	Select the following options as needed. In this example the following was set: **Border Color:** Transparent **Border Width:** 0 **Fill Color:** Transparent

3. Click **Advanced Data Field Options**.

Note: The Advanced Data Field Options window shown below is for a Data Field that has the Field Type of **Text** selected. For information on other Field Types **Advanced Data Field Options**, see the *Asure ID Reference Guide, Section 3 Card Design Application* (PLT-01797) .

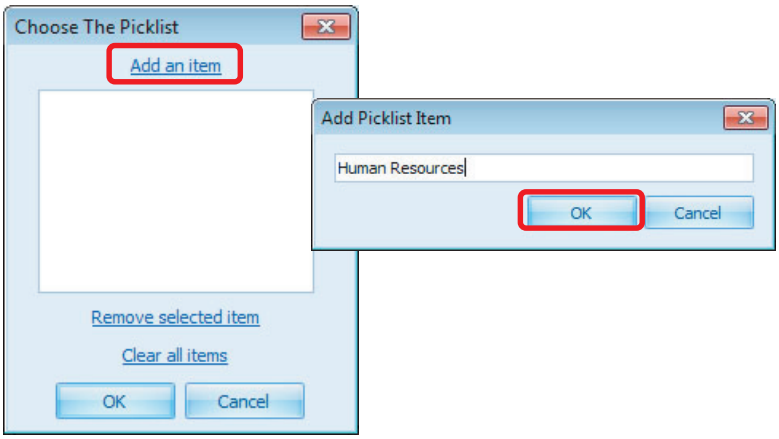


4. Set the following:

   Note: Set the **Picklist** options first, to enable the correct **Default Value** field.

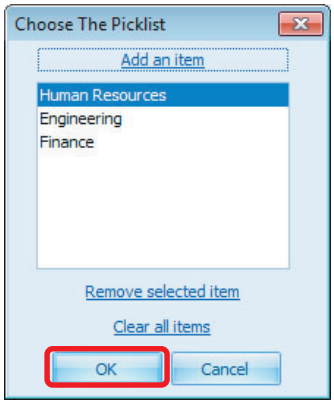
Field	Setting
Text Options	Set the following Text Options: **Default Value:** <NULL> **Max Characters:** 255 **Min Characters:** 0 **Format:** None
Data Source	**Source:** Data Entry
Picklist	Select the following options: **Use a picklist to select the value** **Allow null picklist value**
Data Formatting	Do not select any options.
Data Entry Options	Do not select any options.

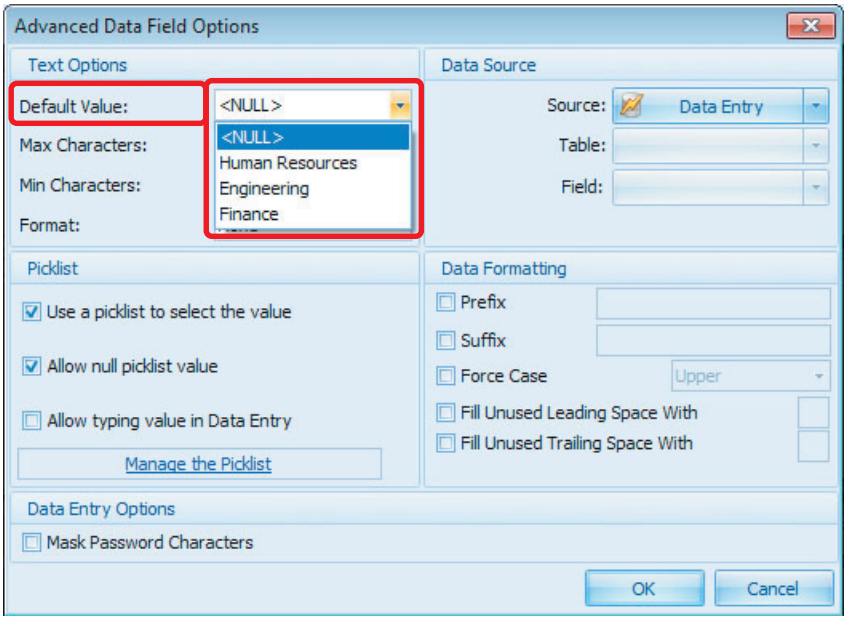
5. Select the **Manage the Picklist** link.
6. Click **Add an Item**.
7. Enter **Human Resources** into the field, and click **OK**.



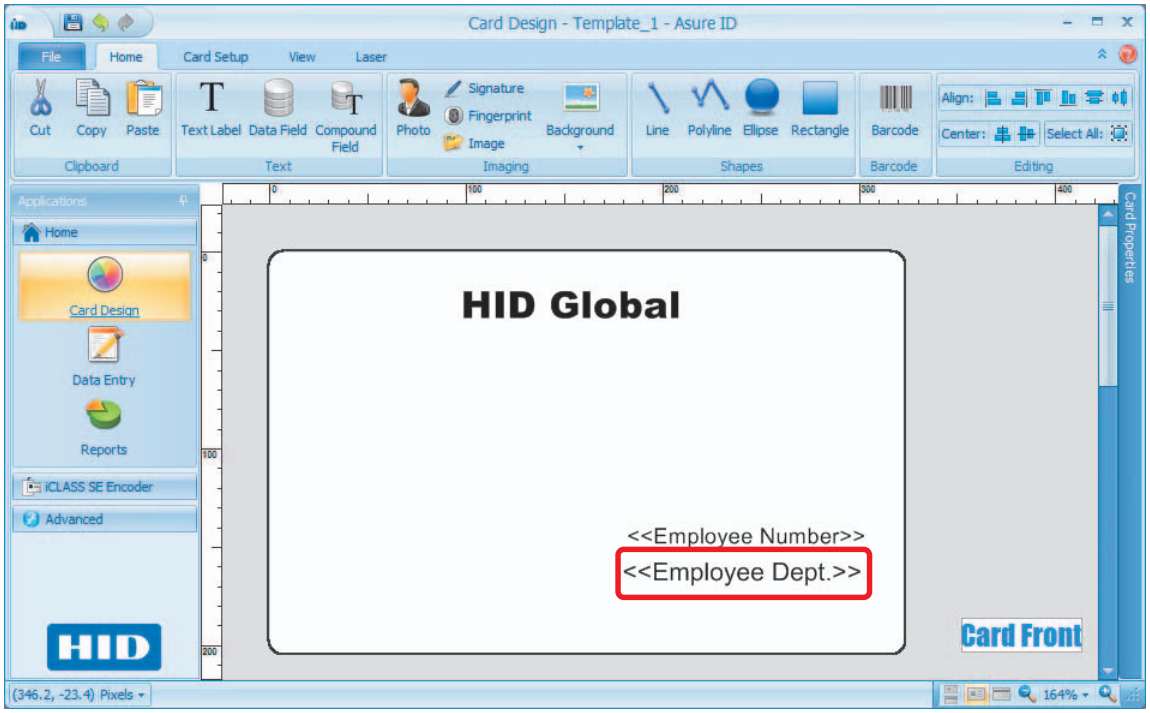
8. Repeat this process entering **Engineering** and **Finance** to the picklist.
9. Click **OK**.

Note: These new items now appear in the drop-down menu for the **Default Value** field.





10. Click **OK** to close the **Advanced Data Field Options** window.
11. Click **OK** to close the **Data Field Properties** window
12. The picklist does not display in the Card Design Application.
13. Position the field on the card design area approximately where shown.

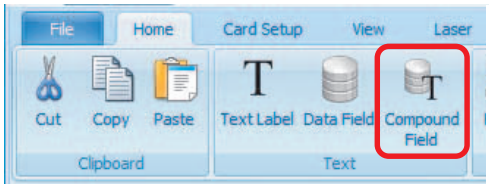


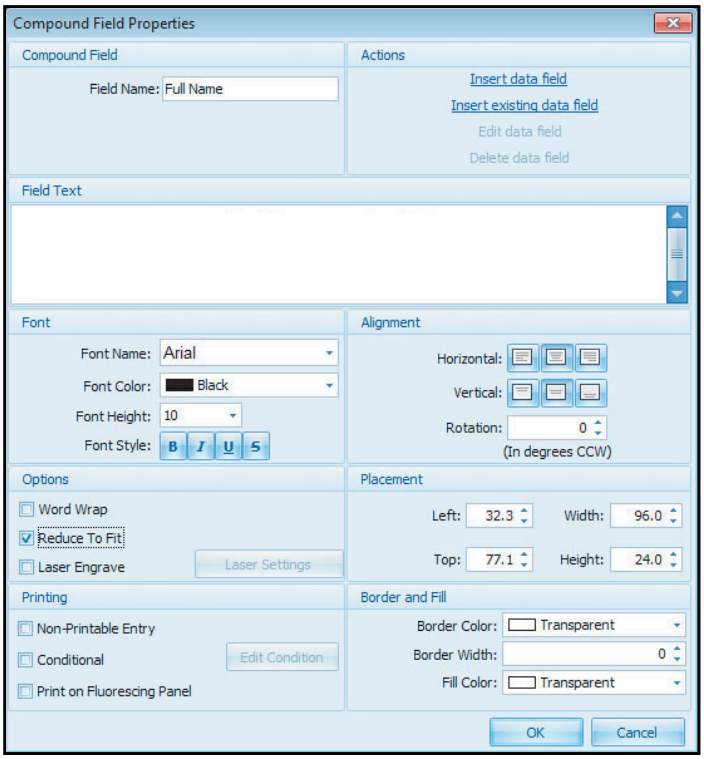
14. Select **File** tab > **Save Template**.

3.2.5 Compound field (last name, first name)

A Compound Field is useful when multiple data fields are to be aligned next to each other. An example of using a Compound Field is placing a last name one space after the first name.

1. Select **Card Design** application > **Home** tab > **Compound Field**.



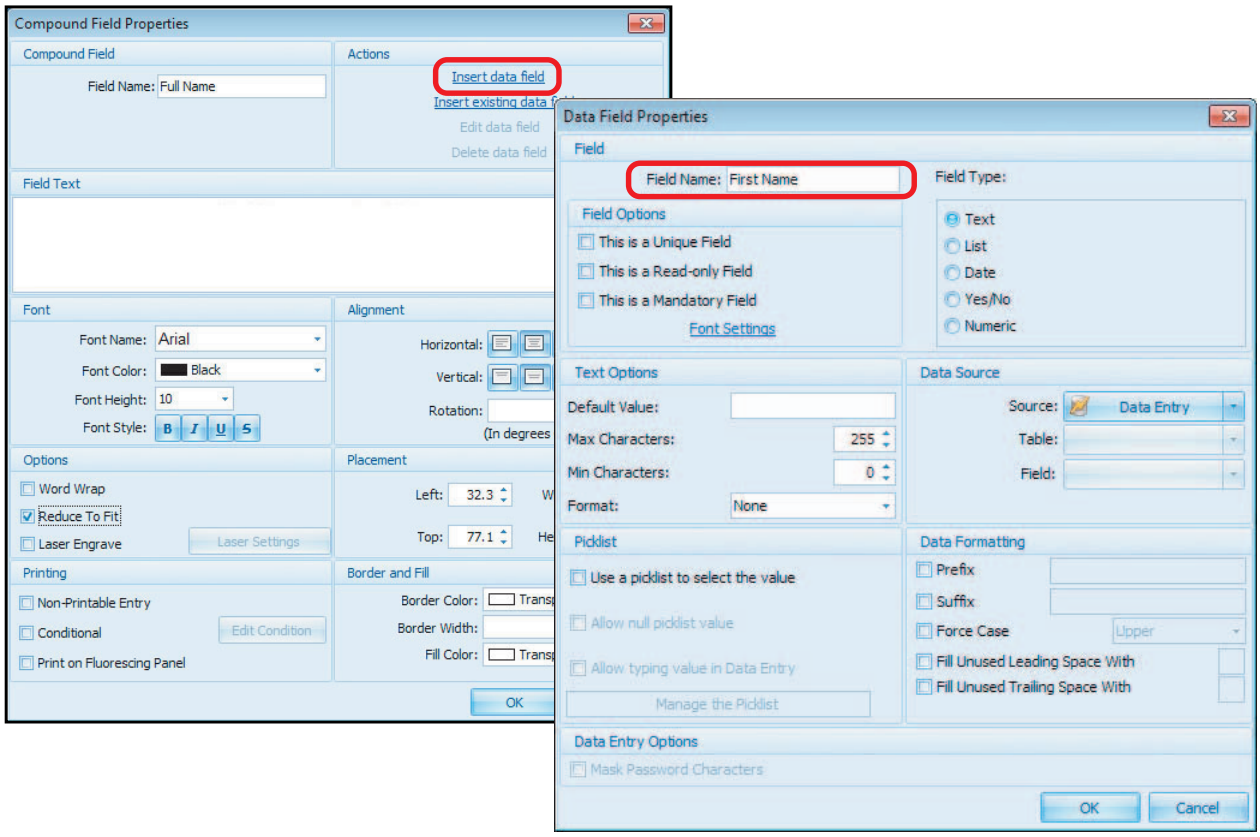


2. Click in the Card Display pane to open **Compound Field Properties**, set the following:

Field	Setting
Compound Field	Define the field name and enter the text to display in this field. **Note:** The Field Name should be a name that can be associated to the actual field text. **Field Name:** Enter **Full Name** **Field Text:** This field auto-populates after the data has been entered.
Actions	Click **Insert Data Field** to add data to the field. Click **Insert Existing Data Field** to use a existing data field set up on the card template.
Font	Set the font options. In this example the following was set: **Font Name:** Arial **Color:** Black **Font Height:** 10 **Font Style:** No selection was made.
Alignment	Select alignment options. In this example Both options were set as **Center**.
Options	Select the **Reduce to Fit** option.

Field	Setting
Placement	Leave whatever data is populated. The text box can be moved using drag/drop.
Printing	Do not select any options.
Border and Fill	Select the following options as needed. In this example the following was set: **Border Color:** Transparent **Border Width:** 0 **Fill Color:** Transparent

3. Select **Insert Data Field**.

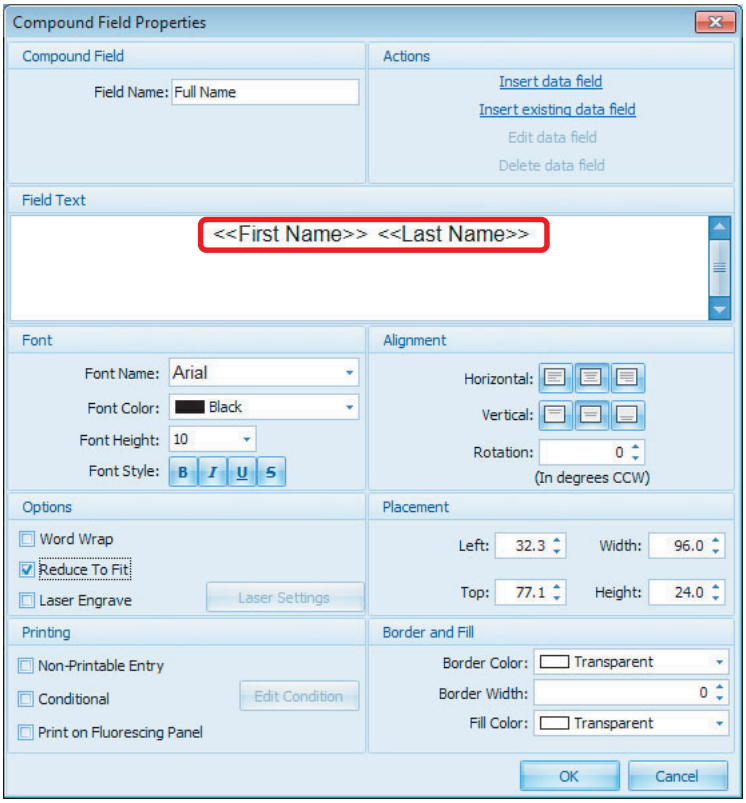


4. Set the following on the **Data Field Properties** window:

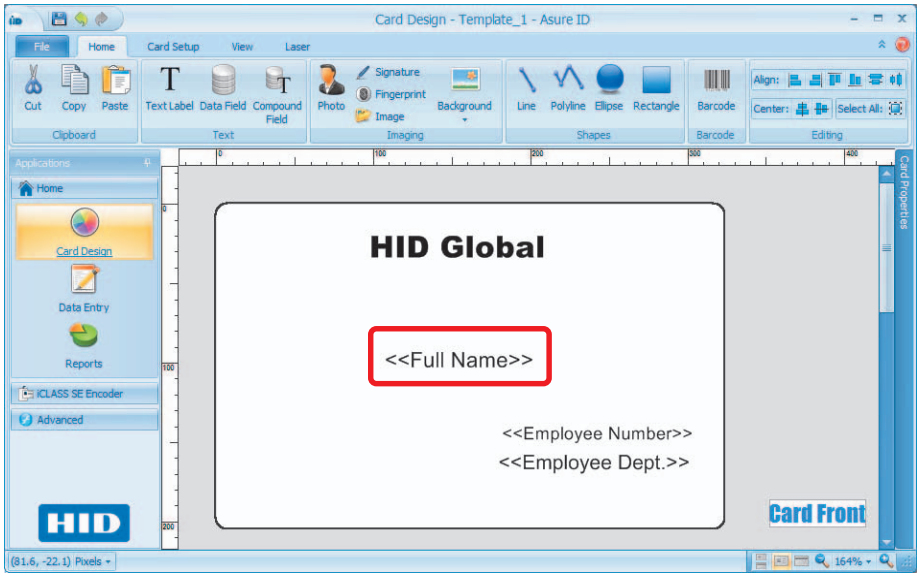
Field	Setting
Field	**Field Name:** Enter **First Name** **Field Type:** Text **Field Options:** Do not select any options.
Text Options	Set the following Text Options: **Default Value:** Leave blank. **Max Characters:** 255 **Min Characters:** 0 **Format:** None
Data Source	**Source:** Data Entry. For information on adding a database source, see *Section 4 Data Entry application*.

Field	Setting
Picklist	Do not select any options.
Data Formatting	Do not select any options.
Data Entry Options	Options disabled.

5. Click **OK**.
6. Repeat steps 3, 4, and 5 with the **Field** name entered as **Last Name**.
7. Enter a space between the first and second data fields, on the **Field Text** display pane. If this is not done, when the data is entered the two text fields are continuous.



8. Click **OK**. Position the field on the card design area approximately where shown.

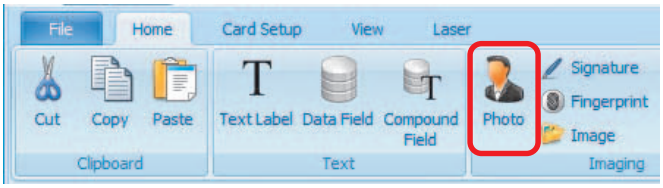


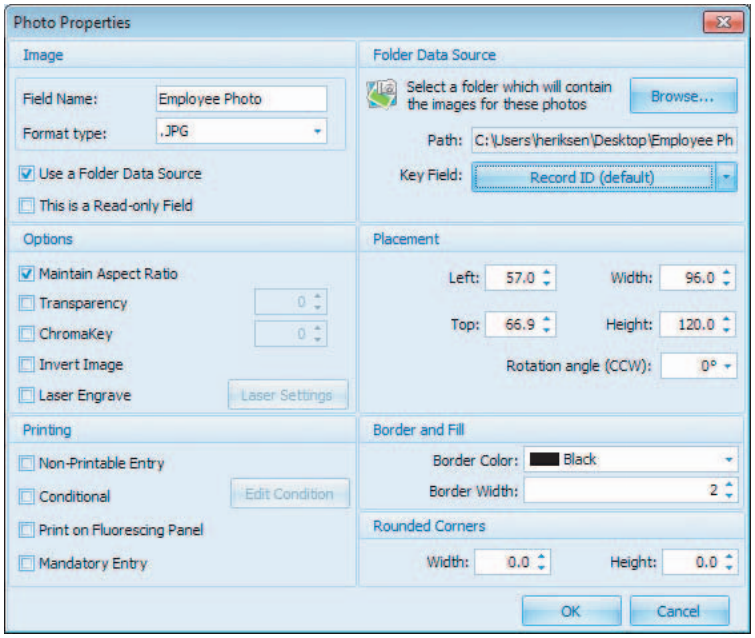
9. Select **File** tab > **Save Template**.

3.2.6 Add a photo

The native database for Asure ID has a size limitation of 2GB when using Microsoft Access (MS Access limitation). Large photo files may cause the database to reach its limitation and prevent the addition of records. It is recommended to place photos in a folder, and using a photo field in the template.

1. Select **Card Design** application > **Home** tab > **Photo**.

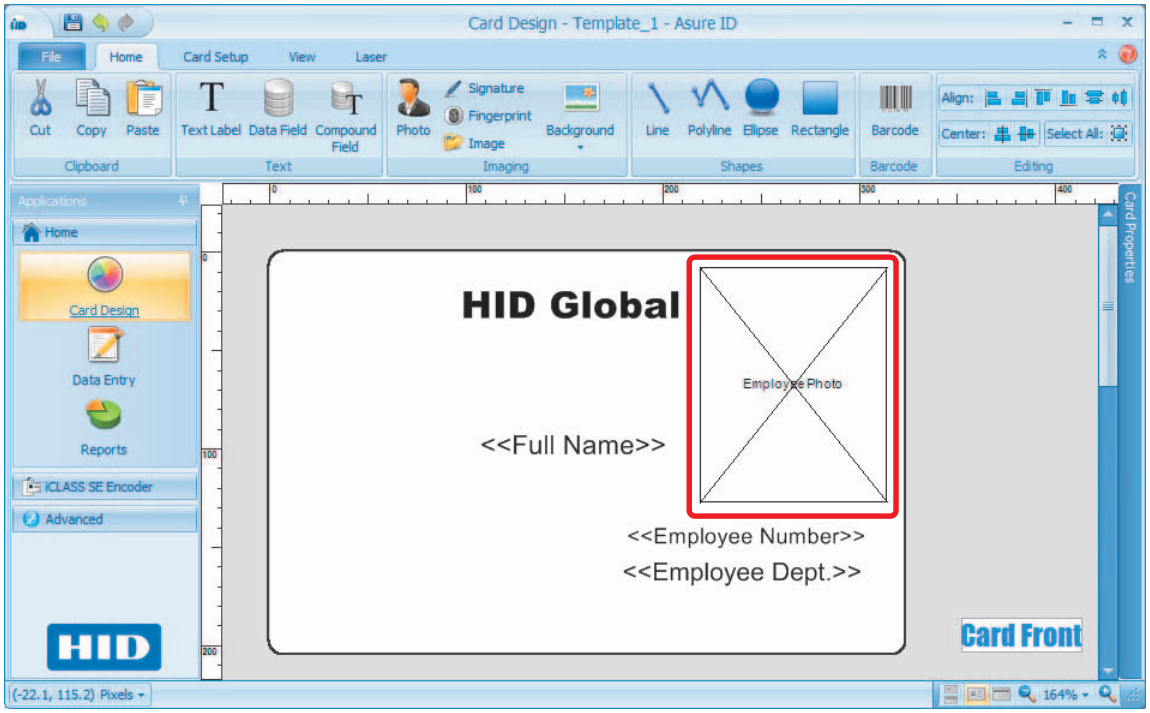




2. Click in the Card Display pane to open **Photo Properties**, set the following:

Field	Setting
Image	Define the field name and select the format type of the graphic. **Field Name:** Enter **Employee Photo** **Format Type:** .JPG Select the **Use a Folder Data Source** option.
Folder Data Source	When the **Use a Folder Data Source** option is selected (in the step above), the **Data Source** pane in the top right, changes to the **Folder Data Source**. **Path:** Select the path to where the photos are stored. **Key Field**: Leave as Record ID (default). **Note:** Key fields are covered in *Section 4 Data Entry application*.
Options	Select the **Maintain Aspect Ratio** option.
Placement	Leave whatever data is populated. The text box can be moved using drag/drop.
Printing	Do not select any options.
Border and Fill	Select the following options as needed. In this example the following was set: **Border Color:** Black **Border Width:** 2 **Rounded Corners:** 0

3. Click **OK**.
4. Position and size the photo field on the card.

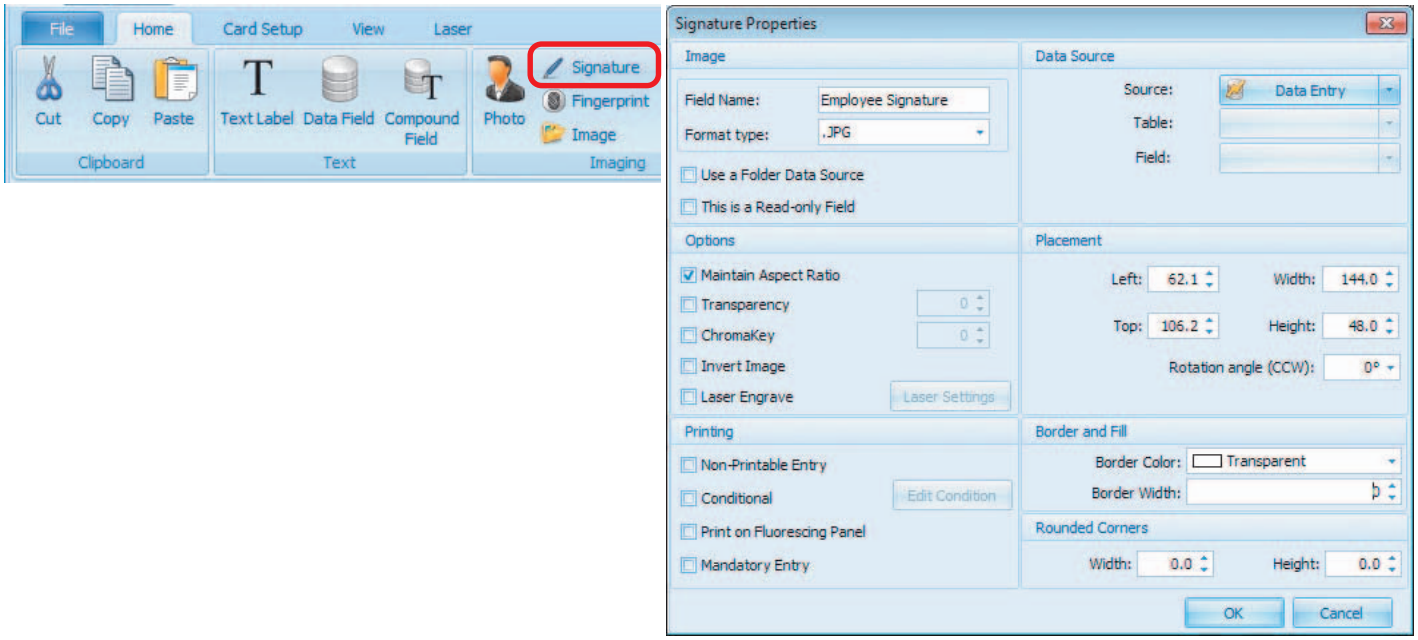


5. Select **File** tab > **Save Template**.

3.2.7 Add a signature

Adding a signature can either be done through a graphic stored in a folder or through a signature capture device.

1. Select **Card Design** application > **Home** tab > **Signature**.

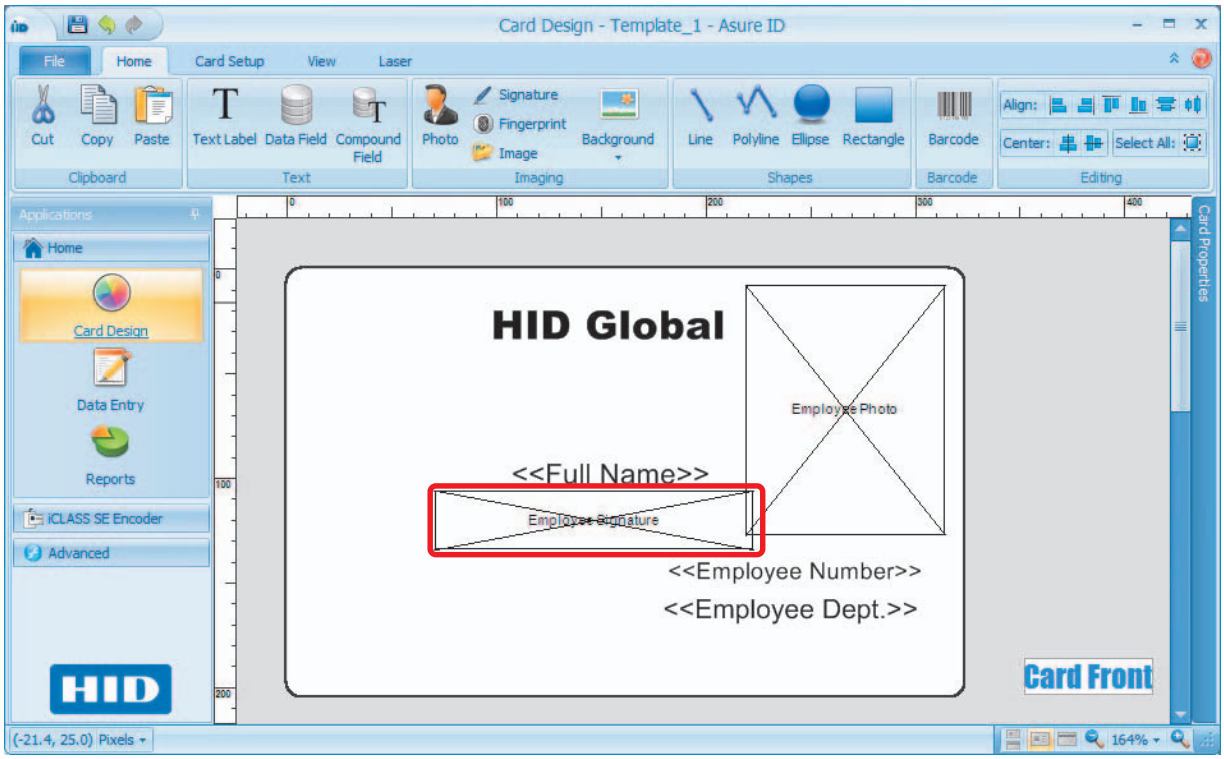


2. Click in the Card Display pane to open **Signature Properties**, set the following:

Field	Setting
Image	Define the field name and select the format type of the graphic. Do not select the options. **Field Name:** Enter **Employee Signature** **Format Type:** .JPG
Folder Data Source	The **Table** and **Field** options are disabled. A signature tablet is used to add the employee signature.
Options	Select the **Maintain Aspect Ratio** option.
Placement	Leave whatever data is populated. The text box can be moved using drag/drop.
Printing	Do not select any options.
Border and Fill	Select the following options as needed. In this example the following was set: **Border Color:** Transparent **Border Width:** 0

3. Click **OK**.

4. Position and size the signature field on the card.

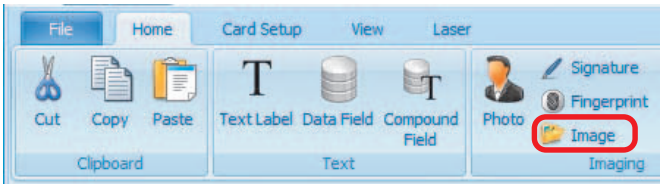


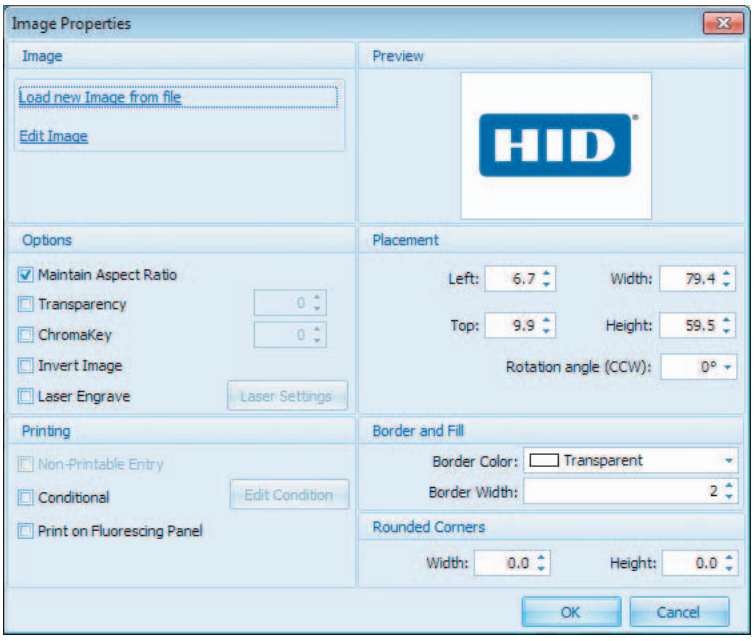
5. Select **File** tab > **Save Template**.

3.2.8 Add image (logo)

The image (such as a logo) displays on every card.

1. Select **Card Design** application > **Home** tab > **Image**.



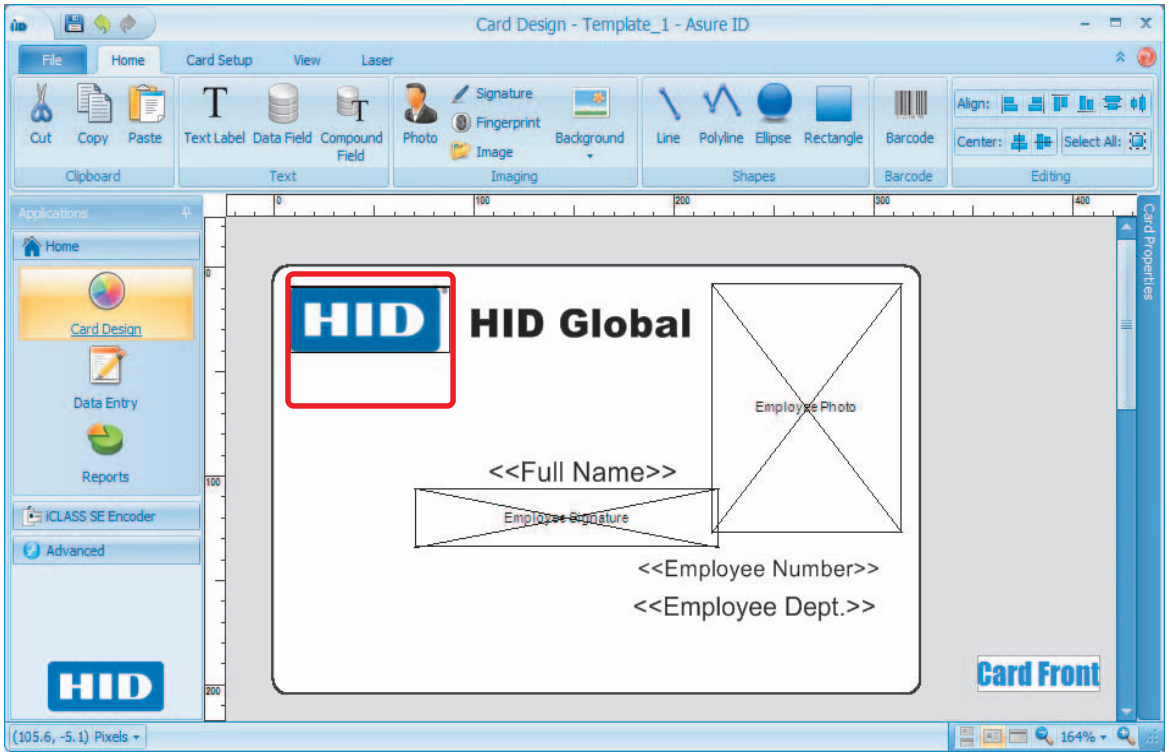


2. Click in the Card Display pane to open **Compound Field Properties**, set the following:

Field	Setting
Image	Click **Load new Image from file**. Browse to locate the file. The graphic appears in the Preview pane. **Note:** If this is not the correct graphic or needs editing, select **Edit Image**.
Options	Select the **Maintain Aspect Ratio** option.
Placement	Leave whatever data is populated. The text box can be moved using drag/drop.
Printing	Do not select any options.
Border and Fill	Select the following options as needed. In this example the following was set: **Border Color:** Transparent **Border Width:** 0
Rounded Corners	Both options (Width and Height) should be left at 0.

3. Click **OK**.

4. Position and size the image field on the card.



5. Select **File** tab > **Save Template**.

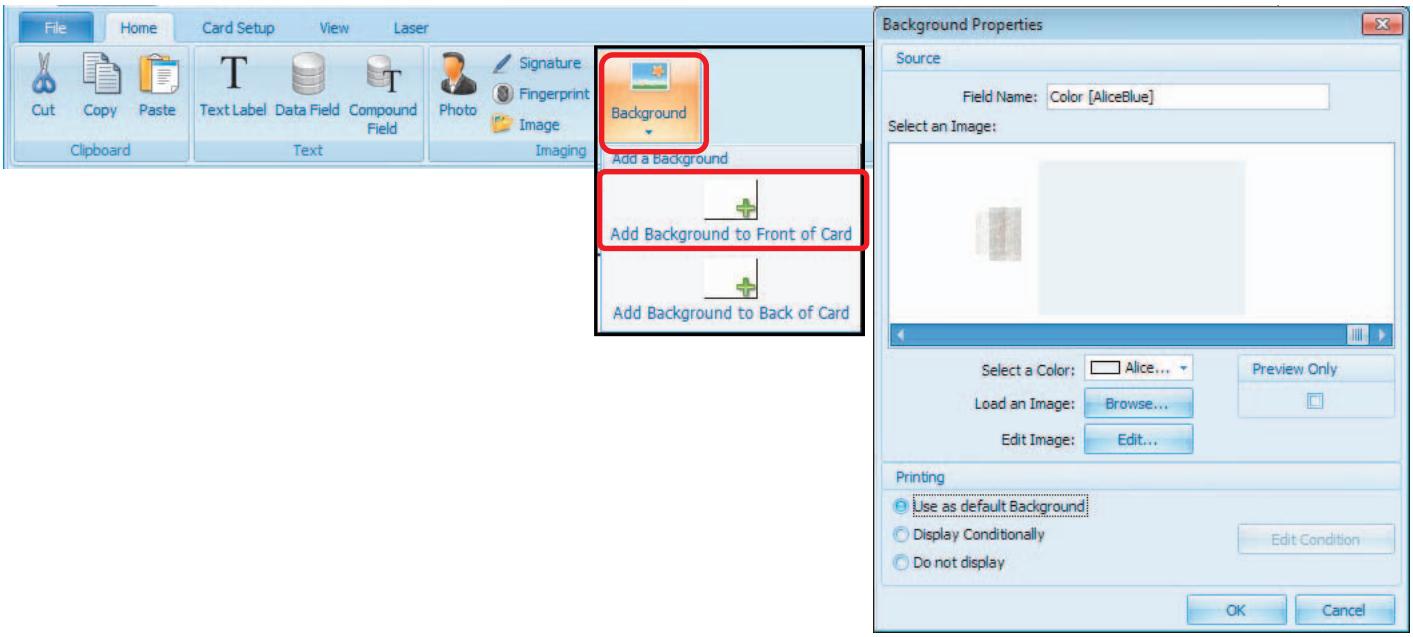
3.2.9 Background

A background displays on every card. This can be customized as a solid color, sample background or you can add your own background to the folder **Asure ID** > **Images** > **Asure ID Backgrounds**.

1. Select **Card Design** application > **Home** tab > **Background**.

   Note: If the card is dual-sided, you can select which side to apply the background. You can also right-click on the card and select **Add Background**.

2. Select **Add Background to Front of Card**.

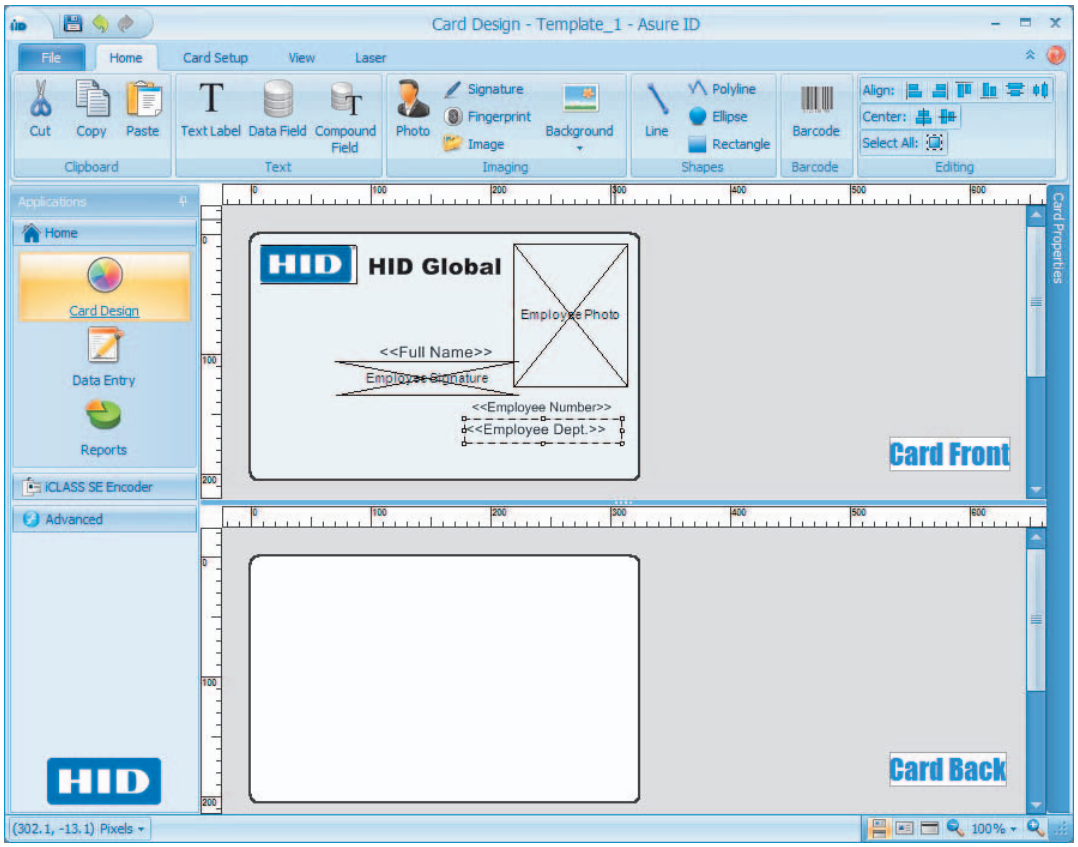


3. Set the following on the Background Properties window:

Field	Setting
Image	Click **Load new Image from file**. The graphic appears in the Preview pane. **Note:** If this is not the correct graphic, or needs editing, select **Edit Image**.
Options	Select the **Maintain Aspect Ratio** option.
Placement	Leave whatever data is populated. The text box can be moved using drag/drop.
Printing	Do not select any options.
Border and Fill	Select the following options as needed. In this example the following was set: **Border Color:** Transparent **Border Width:** 0
Rounded Corners	Both options (Width and Height) should be left at 0.

4. In this example we select a color background. From the **Select a Color** option, click the **Web** tab. Select a color from the pull-down list. The color selection appears in the display window.
5. Click **OK**.

6. The background now displays on the card.



The basic card template is completed.

At this point you can edit any fields by double-clicking on the object and changing the properties in the dialog box.

Fields can also be freely moved by drag-and-drop or by changing the **Placement** properties window (displayed after double-clicking the object).

Resizing of an object can also be done by selecting and dragging by the handle to resize.

7. Select **File** tab > **Save Template**.

3.3 Advanced card design tutorial

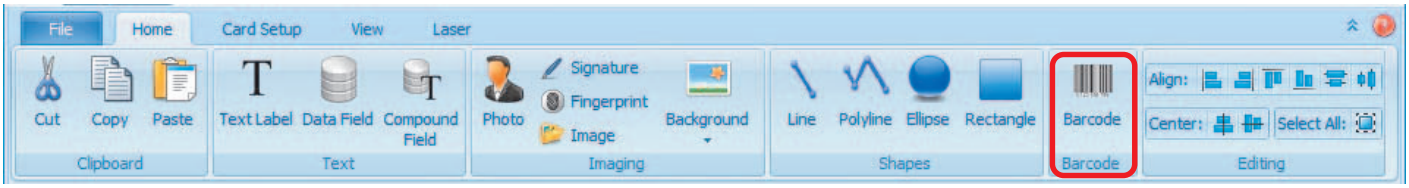
Building upon the basic card template, you can add options such as:

- Shapes - See the Card Design section in the *Asure ID Reference Guide, Section 3 Card Design Application* (PLT-01797), for information on adding shapes.
- Barcode - See *Section 3.3.1 Add a barcode*
- Magnetic Stripe - See *Section 3.3.2 Magnetic stripe (magstripe)*
- Smart Chip - See *Section 3.3.3 Enable smart chips*

Note: For information on the **PACS Registration**, **Laser Writer**, or **Live Link**, see the *Asure ID Reference Guide, Section 3 Card Design Application* (PLT-01797).

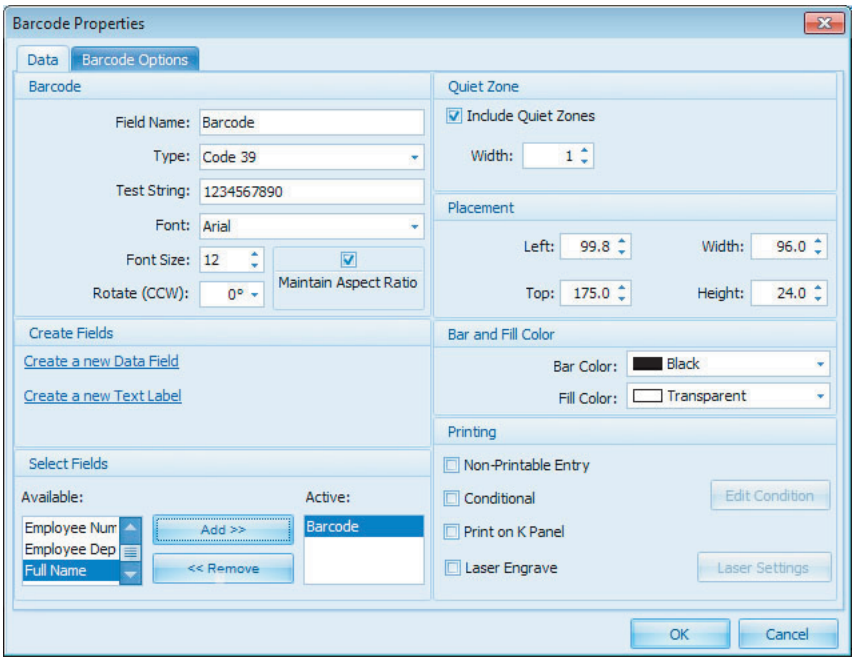
3.3.1 Add a barcode

Select **Card Design** application > **Home** tab > **Image**.



3.3.1.1 Barcode data tab

1. Click in the Card Display pane to open **Barcode Properties** set the following on the **Data** tab.

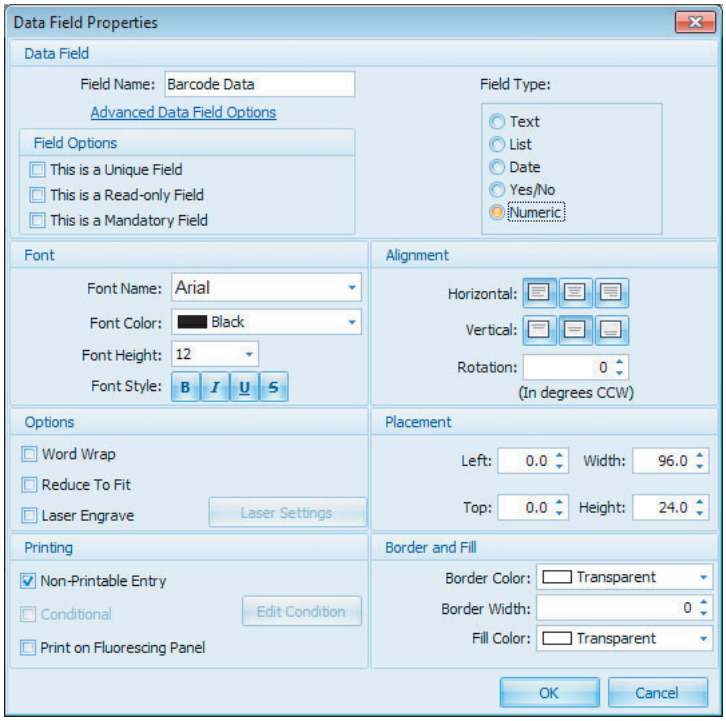


Field	Setting
Barcode	**Field Name:** Enter **Barcode.** **Type:** Leave the default **Code 39**. There are many options available from the drop-down list. See the *Asure ID Reference Guide, Section 3 Card Design Application* (PLT-01797), for information. **Test String:** Leave the test string. **Font:** Arial **Font Size:** 12 **Rotate (CCW):** 0 **Maintain Aspect Ratio:** Select this option.
Create Fields	Select **Create a new Data Field**. See *Section 3.3.1.2 Create a barcode data field*.
Select Fields	Select the **Barcode Data** field from the **Available** pane**,** and click **Add** to move to the **Active** pane. **Note:** This can only be done after the Barcode Data field has been created in the field above.
Quiet Zone	Select the **Include Quiet Zones** option. This leaves a white area around the barcode for ease of reading.
Placement	Leave whatever data is populated. The text box can be moved using drag/drop.
Bar and Fill Color	Select the following options as needed. In this example the following was set: **Bar Color:** Black **Fill Color:** Transparent
Printing	Do not select any options.

2. Click **OK**.

3.3.1.2 Create a barcode data field

1. Select **Create a New Data Field**. This is the information coded into the barcode.
2. The **Data Field Properties** window opens.



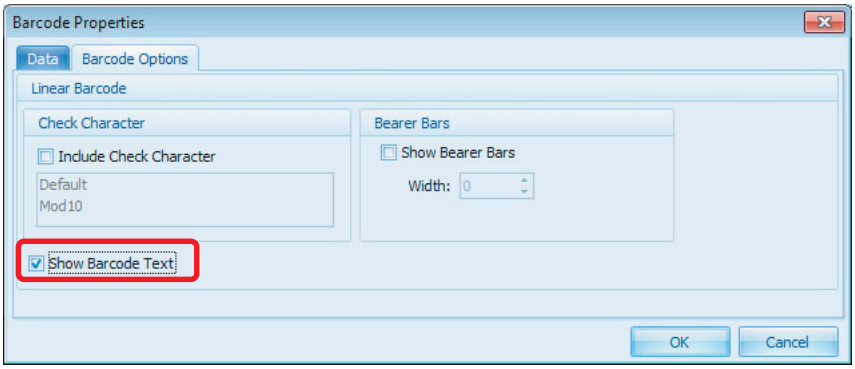
3. Set the following on the **Data Field Properties** window.

Field	Setting
Data Field	Define the field name and enter the text to display in this field. **Note:** The Field Name should be a name that can be associated to the actual field text. **Field Name:** Enter **Barcode Data** **Field Type:** Numeric **Field Options:** Do not select any options.
Font	Set the font options. In this example the following was set: **Font Name:** Arial **Color:** Black **Font Height:** 12 **Font Style:** No selection was made.
Alignment	Select alignment options. In this example Both options were set as **Center**.
Options	Do not select any options.
Placement	Leave whatever data is populated. The text box can be moved using drag/drop.
Printing	Select the **Non-Printable Entry** option.
Border and Fill	Select the following options as needed. In this example the following was set: **Border Color:** Transparent **Border Width:** 0 **Fill Color:** Transparent

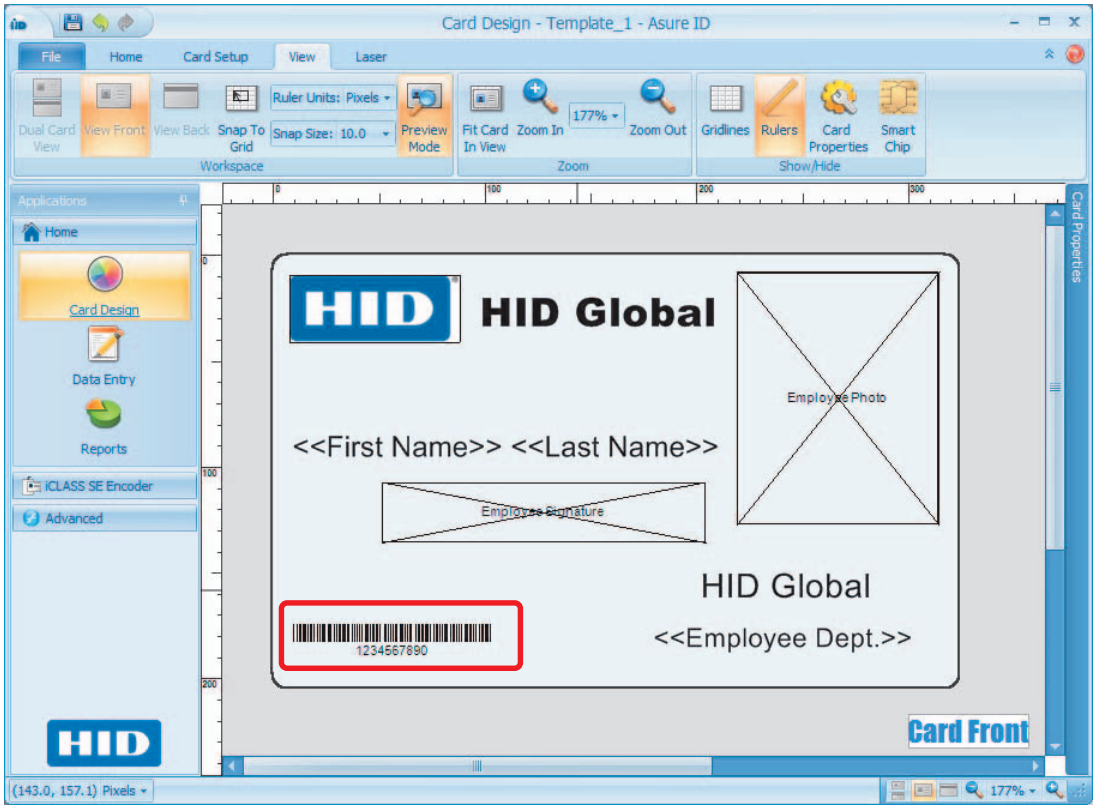
4. Click **OK**. You are returned to the **Barcode Properties** window, and this newly created field is listed on the **Select Fields** > **Available** pane.

3.3.1.3 Barcode options tab

1. Select the **Show Barcode Text**. option.
2. Click **OK**.



3. Position the barcode field on the card design area.

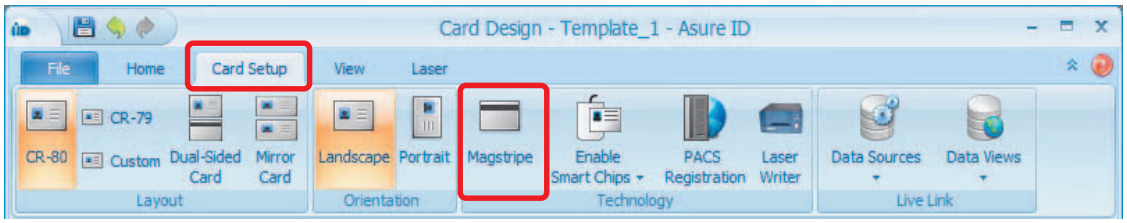


4. Select **File** tab > **Save Template**.

3.3.2 Magnetic stripe (magstripe)

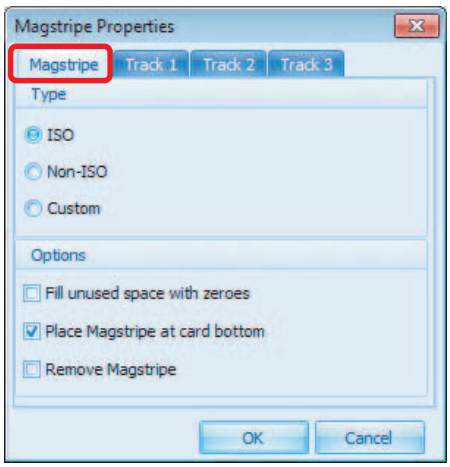
The **Magstripe** option is located on the **Card Setup** tab.

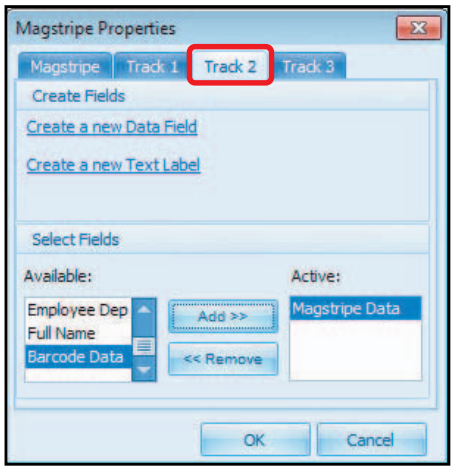
The magstripe is located on the back side of this card template. The default position is the top of the card.



To Add a Magstripe:

1. Select the **Card Design** application > **Card Setup** tab > **Magstripe**.



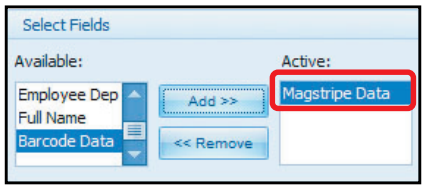


2. On the **Magstripe** tab set the following:

Field	Setting
Type	Select the **ISO** option.
Options	Select the Place Magstripe at card bottom.

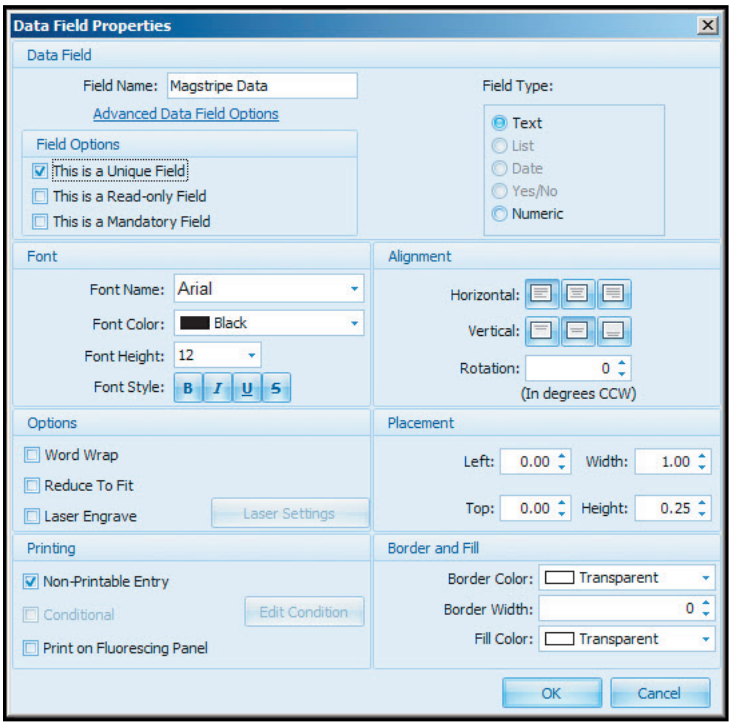
3. On the **Track 2** tab click **Create a new Data Field**.

Field	Setting
Create Fields	Click **Create a new Data Field**. See *Section 3.3.2.1 Create a magstripe data field*.
Select Fields	Select the **Magstripe Data** field from the **Available** pane**,** and click **Add** to move to the **Active** pane. **Note:** This can only be done after the Magstripe Data field has been created in the field above.



3.3.2.1 Create a magstripe data field

1. Set the following on the **Data Field Properties** window.



Field	Setting
Data Field	**Field Name:** Enter **Magstripe Data** **Field Type:** Text **Field Options:** This is a Unique Field
Font	Set the font options. In this example the following was set: **Font Name:** Arial **Color:** Black **Font Height:** 10 **Font Style:** No selection was made.
Alignment	Do not select any options.
Options	Do not select any options.
Placement	Leave whatever data is populated. The text box can be moved using drag/drop.
Printing	Select the **Non-Printable Entry** option.
Border and Fill	Select the following options as needed. In this example the following was set: **Border Color:** Transparent **Border Width:** 0 **Fill Color:** Transparent

2. Click **OK**. The magstripe is added to the bottom of the back of the card.

3.3.3 Enable smart chips

Cards listed under the Enable Smart Chips option, have a smart chip embedded in the card.

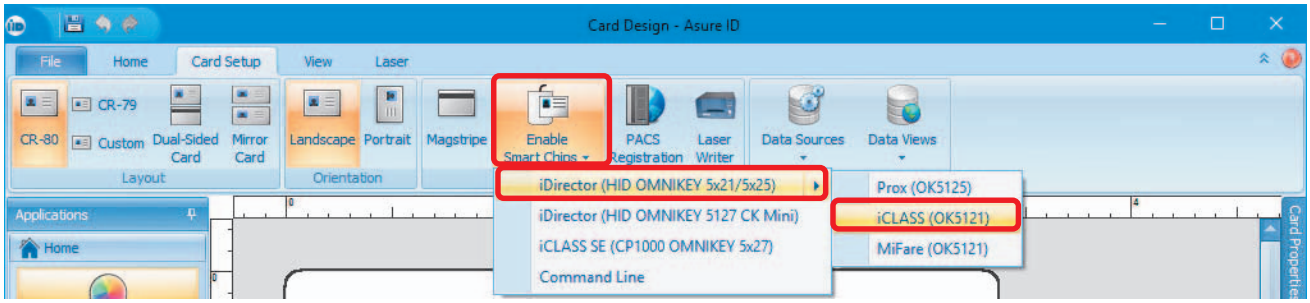
Note: The Smart Chip is not visible on the card template.

For enabling other types of smart chips other than what is shown in this example, see the *Asure ID Reference Guide, Section 3 Card Design Application* (PLT-01797).

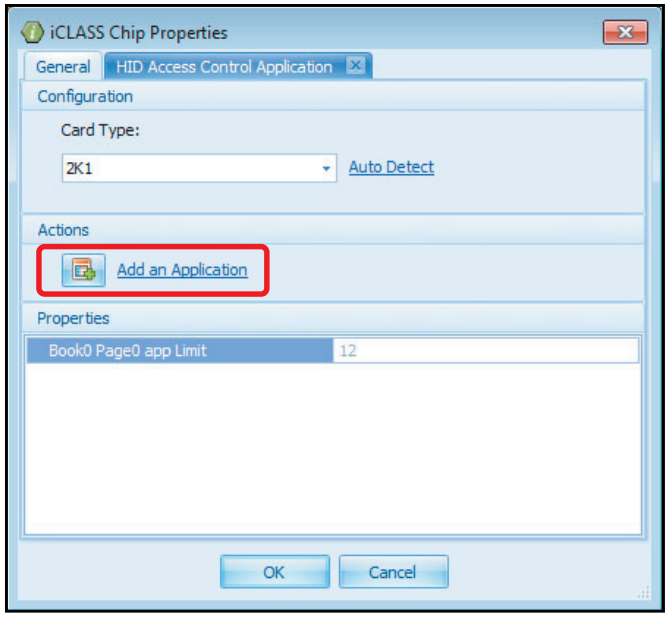
The Card Properties pane shows any applications added. This section is only covering using iDIRECTOR® to enable an iCLASS® smart chip for a read application.

To Enable a Smart Chip:

1. Select the **Card Design** application > **Card Setup** tab > **Enable Smart Chips** > **IDirector** > **iCLASS**.



2. The **iCLASS Chip Properties** dialog box opens.



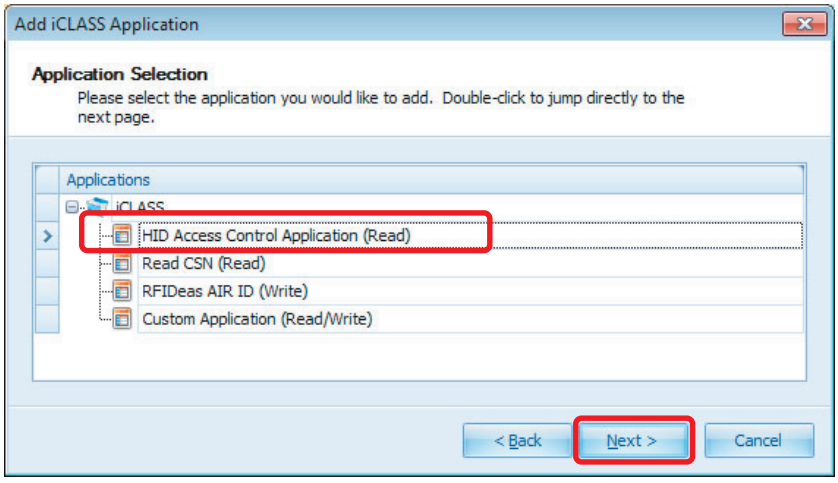
Field	Setting
Configuration	**Card Type:** Select the card type from the pull-down list. **Note:** If the reader is connected, select **Auto Detect**. For this example, leave the default (2K1).
Actions	Click **Add an Application**.
Properties	No settings for this option.

3.3.3.1 iDIRECTOR wizard

The iDIRECTOR® wizard allows you to add an iCLASS® application.

1. On the welcome window click **Next**.

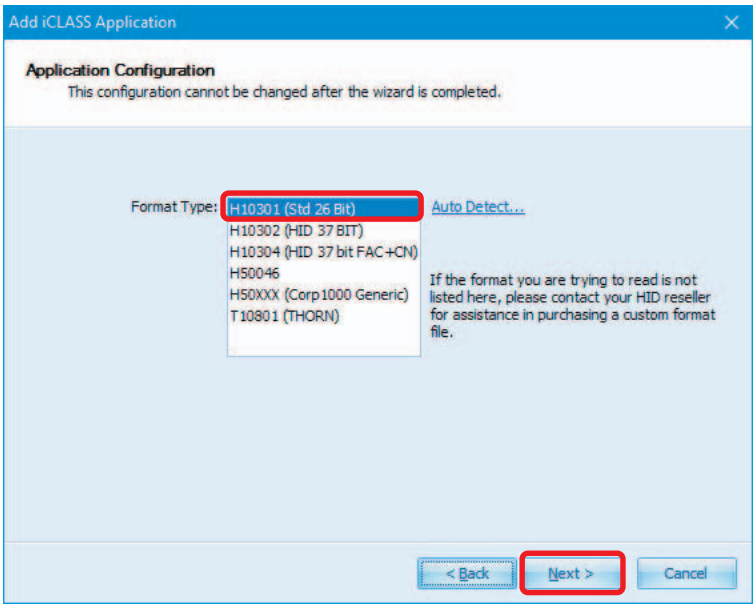
2. Select the **HID Access Control Application (Read)** application.
3. Click **Next**.



4. Select the **H10301 (Std 26 Bit) Format Type**.

Note: This configuration cannot be changed after the wizard is completed. If the application needs to be modified, you must delete the existing application, then add a new one.

5. Click **Next**.



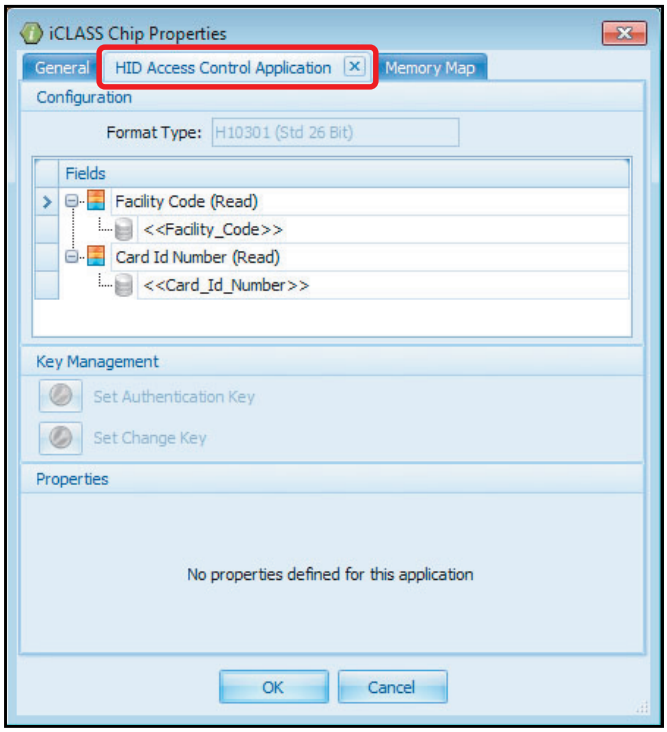
6. Select the **Create a Data Field for each iDIRECTOR Field** option for this example.

   Create a Data Field for each iDIRECTOR Field option:

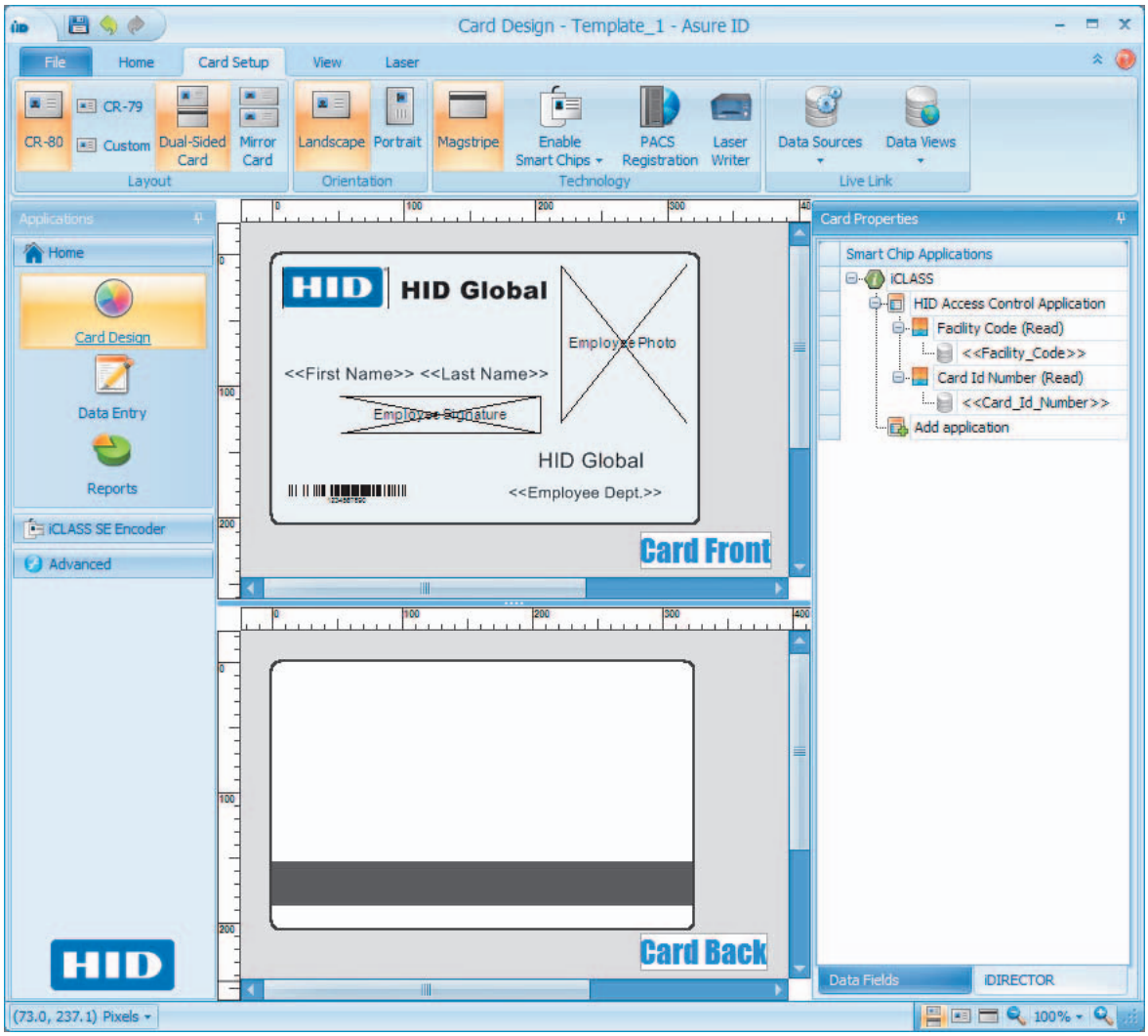
   - **Disabled:** To read HID Access Control Application information and write it to an external data source.
   - **Enabled:** Asure ID creates a data field for the **Facility Code** and **Card ID Number** to be stored within the Asure ID native database.

7. Click **Finish**.

8. A new tab with the new application is added.



9. The advanced card template is completed.



Section 4

4 Data Entry application

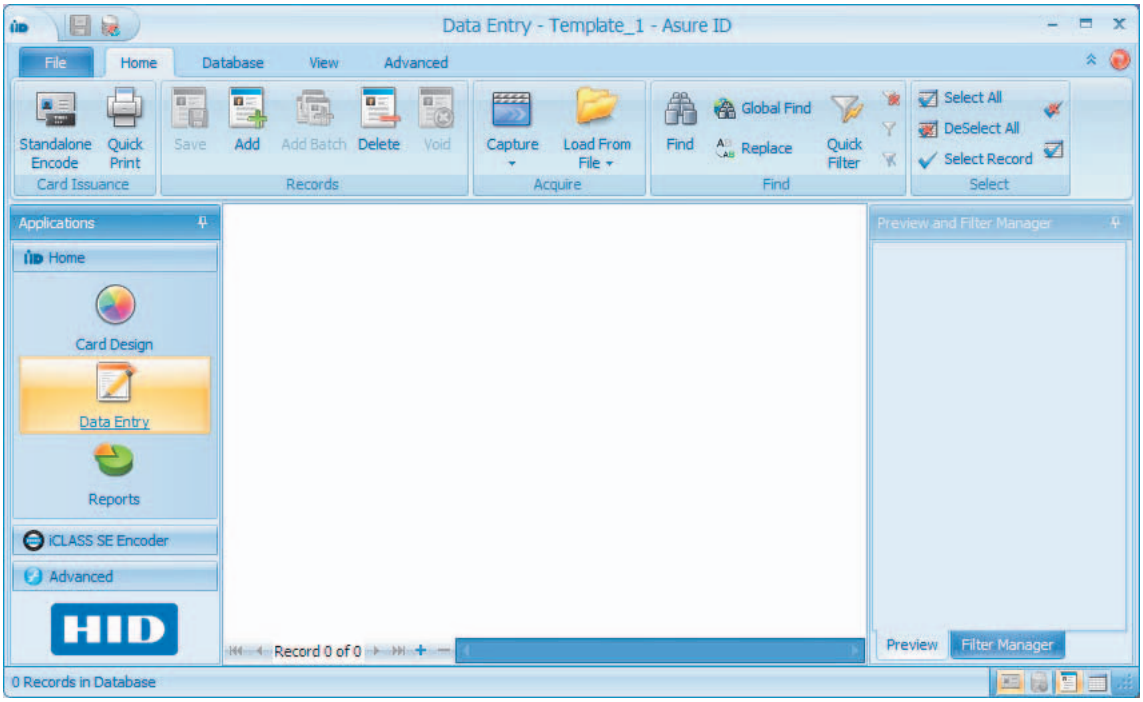
4.1 Data Entry overview

The **Data Entry** application allows you to populate the database created in **Card Design** with the appropriate data for the card, and print the designated cards.

Note: The Asure ID® Solo edition is limited to 200 records.

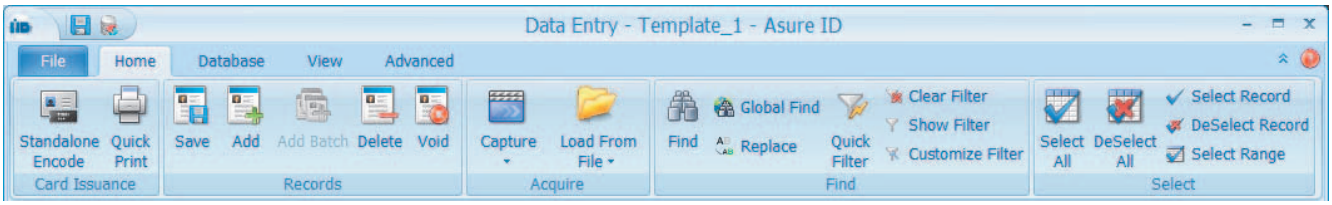
The **Data Entry** application has the following tabs, with a corresponding toolbar.

- **File:** The File tab allows you quick access to open a template or data group, printing, encoding and Laser writer access.
- **Home:** The Home tab allows the configuration of data input, photo and signature acquisition, and record finding/filtering options.
- **Database:** This tab groups import/export and record archive, restore, refresh options.
- **View:** This tab groups the views of current records and record layout options.
- **Advanced:** This tab groups laser controls, encoding, and PACS Integration.



4.2 Data Entry Home tab

The **Data Entry Home** tab contains the basic tools to create a data field. See the *Asure ID Reference Guide, Section 4 Data Entry Application* (PLT-01797) for detailed information on these tools.



4.2.1 Add a record with data, photo, and image fields

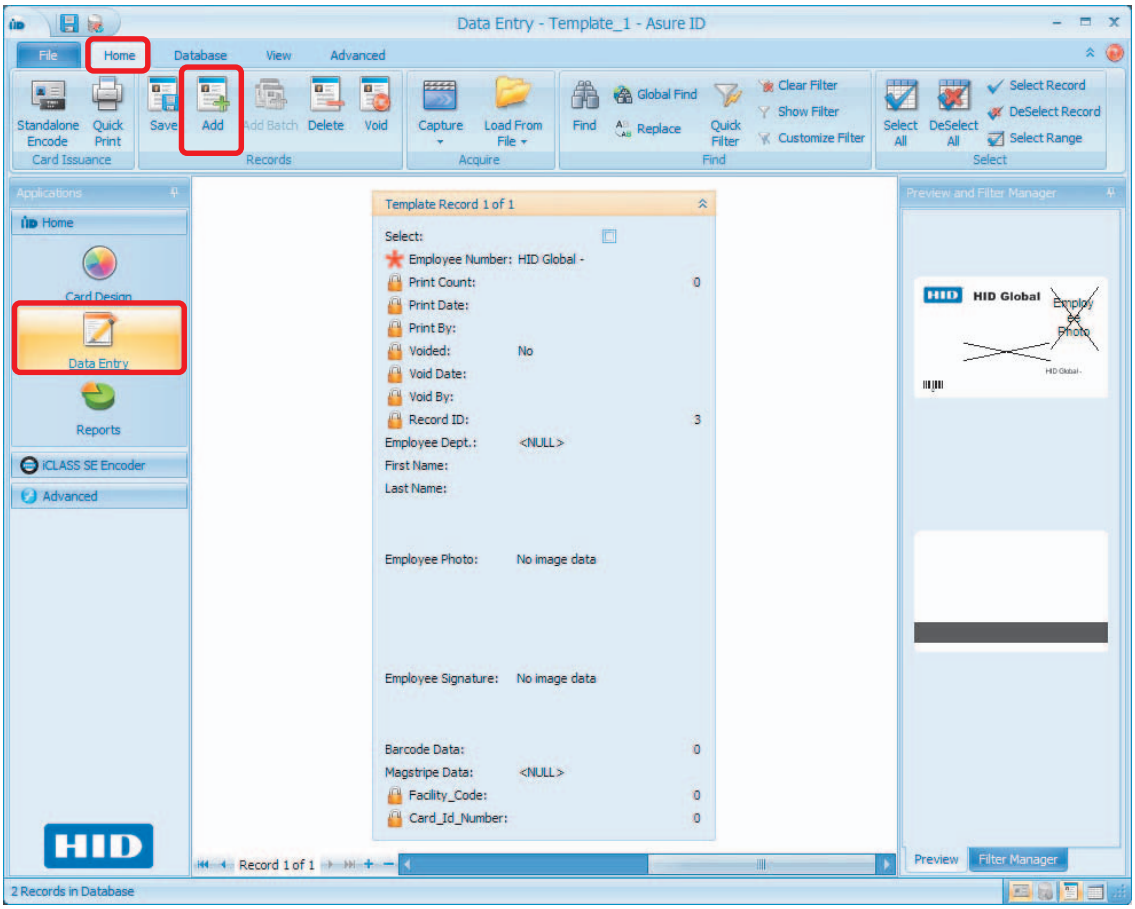
Records can be added individually or in a batch. To add more than one record at a time, select **Add Batch** and input the number of records to add. The window displays these as blank records.

Note: This option cannot be used if:

- The data field is linked with Live Link.
- There are mandatory entries on the template.

Add a Single Record:

1. Select the **Data Entry** application > **Home** tab > **Add**.



2. A new, empty record is displayed.

   Note: The data fields that were added when designing the card template are listed on this new record, ready for the entering information.

3. Enter the following information:

Field	Information
Employee Number	Enter **JDoe 12**. **Note:** The red star indicates the field is required.
Employee Dept.	Select **Engineering** from the pull-down list.
First Name	Enter **Jane**.
Last Name	Enter **Doe**.

4. To add an Employee Photo:

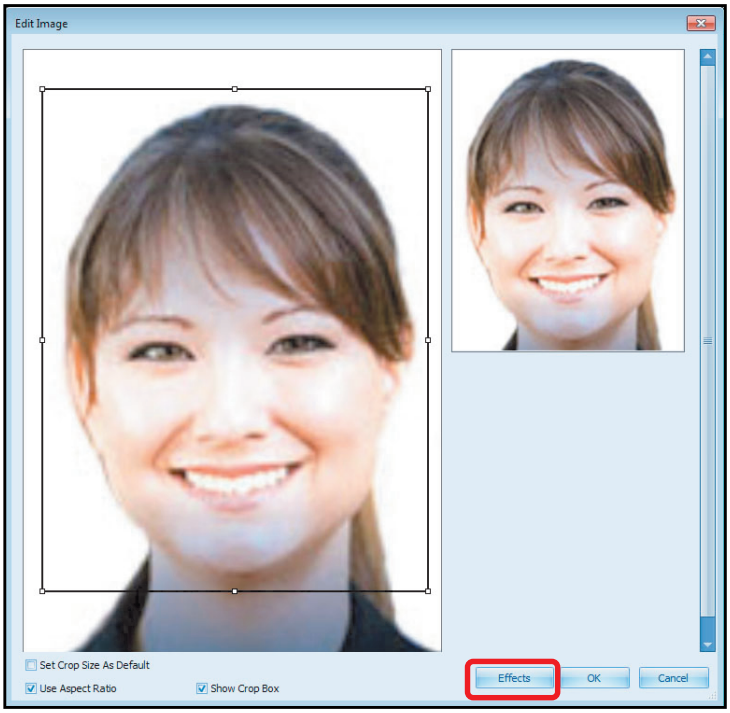
   a. Right-click on the Employee Photo area and select **Load from File**.

      Note: Alternatively you can select the **Load from File** option from the toolbar.

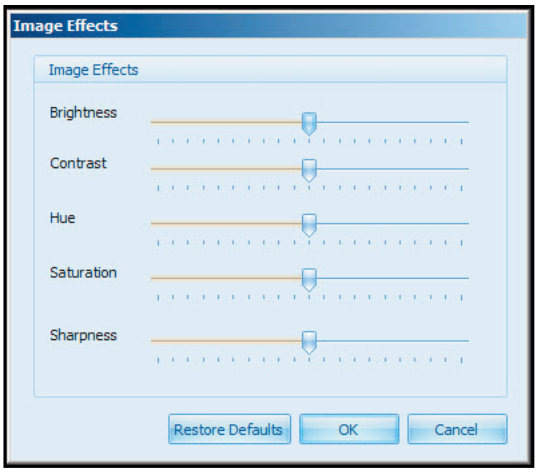
   b. Browse and select the employee image file.

   c. Crop the photo as needed in the **Edit Image** window, and click **OK**.

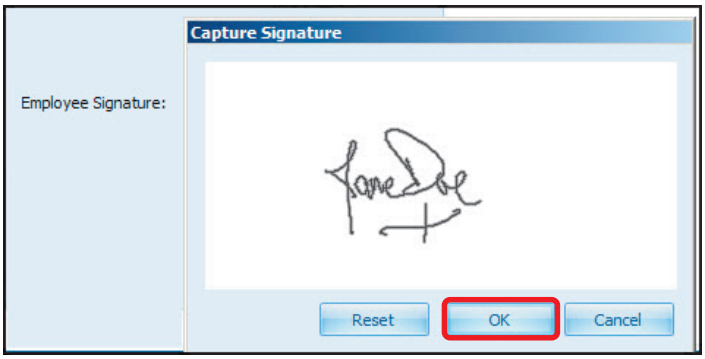
      Note: To re-open the Edit Image window, double-click on the image.



d. The **Effects** option opens a window that allows you to modify the image for best results.



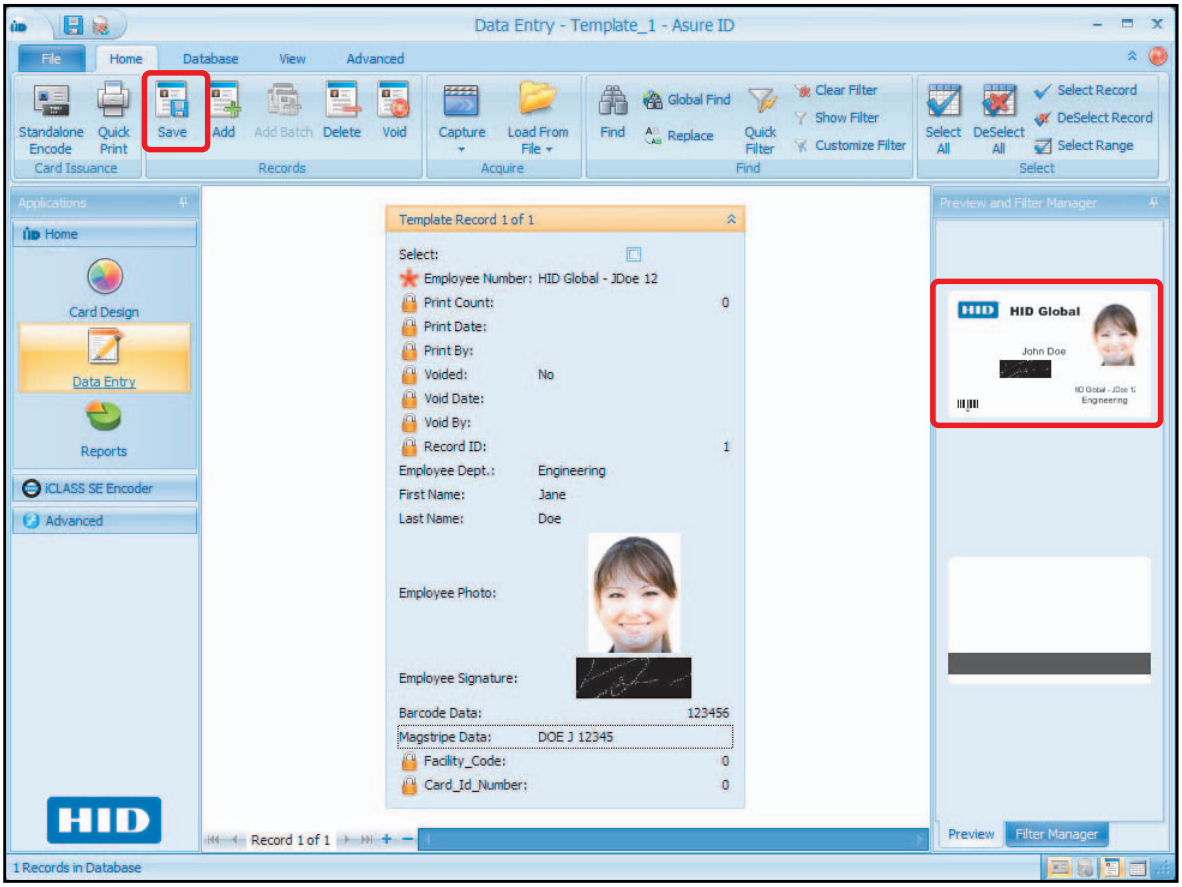
5. To add an Employee Signature:
   a. Right-click in the **Employee_Signature** area and select **Capture Signature**.
   b. You need to use the signature pad for capturing the signature.
   c. Click **OK**.



6. Click **Barcode Data** and type **123456** into the text field.
7. Click **Magstripe Data** and type **12345678** into the text field.

   Note: For Track 2 data requirements, see the *Asure ID Reference Guide* (PLT-01797).

8. Click **Save** within the **Records** group. When the **Save** button is selected, the card previews in the **Preview and Filter Manager** pane.



9. To see an enlarged version you can double-click on the preview.

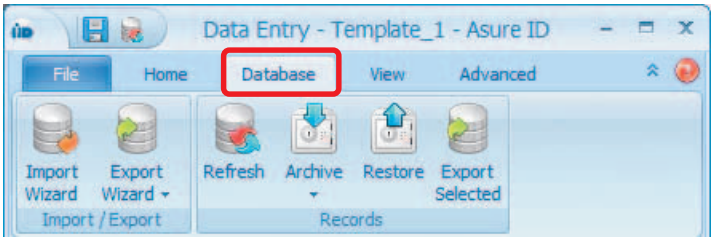
When this card is viewed in the enlarged preview, it is noticeable that the alignment of fields is visually not the best. This is where using the edit tools in the card design comes in handy.

Editing can be done at this stage by returning to the **Card Design** application and moving fields into better positions.

Note: The **Facility_Code** and **Card_ID_Number** cannot be edited.

4.3 Data Entry Database tab

The following section covers the Data Entry application **Database** tab. For additional information on the database and records see the *Asure ID Reference Guide, Section 5 Databases* (PLT-01797).

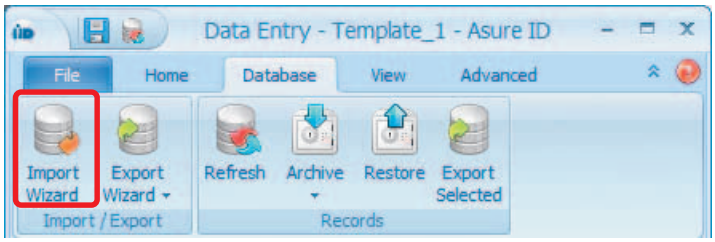


4.3.1 Import/export

Record information can be Imported from a MS Access database, SQL Server database, Oracle database, Excel, or a comma-separated values (CSV) file.

Import record information from a CSV file

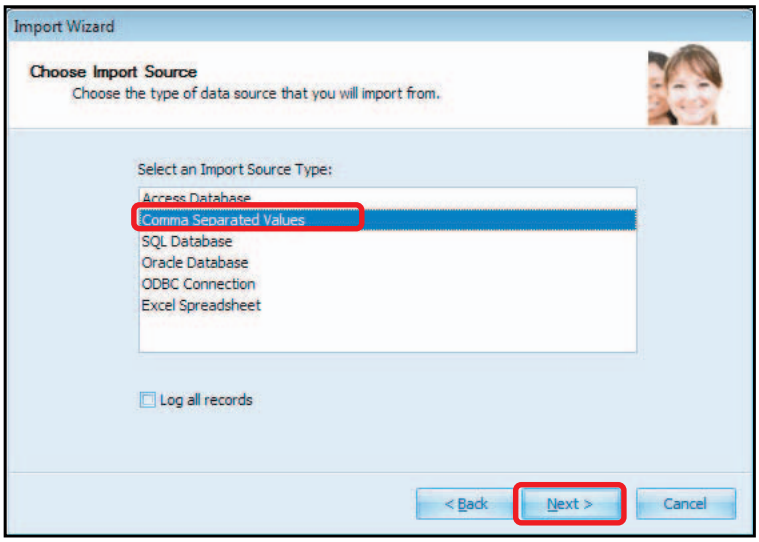
1. Select **Data Entry** application > **Database** tab > **Import Wizard**.



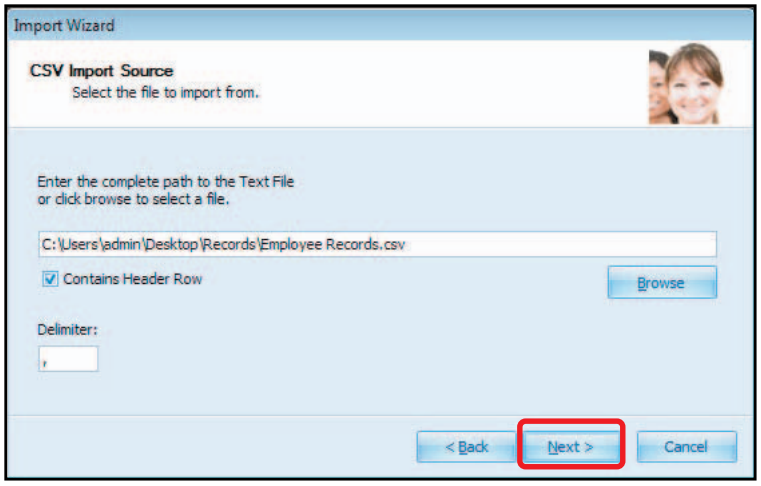
2. The **Import/Restore Wizard** opens. Click **Next**.

3. On the **Choose Import Source** window, select **Comma Separated Values**.

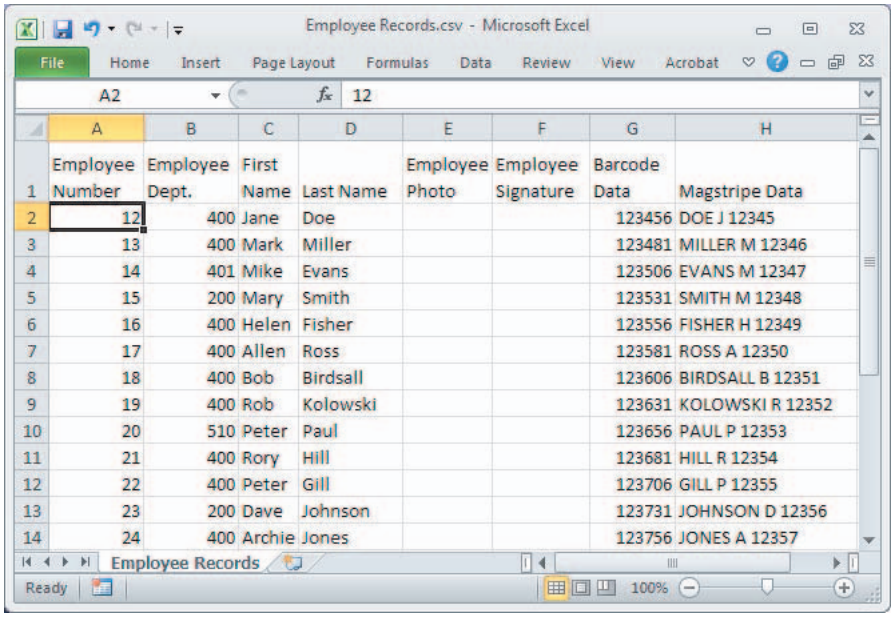
4. Click **Next**.



5. On the **CSV Import Source** window set the following:
   - Click **Browse** to locate and select the database to be imported.
   - Select the **Contains Header Row** option, if this applies.
   - Specify the **Delimiter** in the file.
6. Click **Next**.

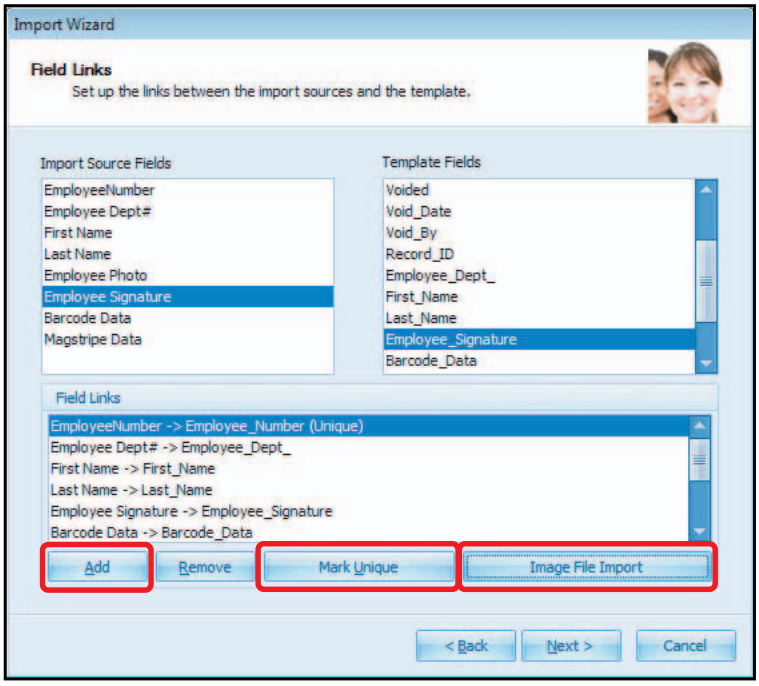


Below is an example of the CSV file.



	A	B	C	D	E	F	G	H
1	Employee Number	Employee Dept.	First Name	Last Name	Employee Photo	Employee Signature	Barcode Data	Magstripe Data
2	12	400	Jane	Doe			123456	DOE J 12345
3	13	400	Mark	Miller			123481	MILLER M 12346
4	14	401	Mike	Evans			123506	EVANS M 12347
5	15	200	Mary	Smith			123531	SMITH M 12348
6	16	400	Helen	Fisher			123556	FISHER H 12349
7	17	400	Allen	Ross			123581	ROSS A 12350
8	18	400	Bob	Birdsall			123606	BIRDSALL B 12351
9	19	400	Rob	Kolowski			123631	KOLOWSKI R 12352
10	20	510	Peter	Paul			123656	PAUL P 12353
11	21	400	Rory	Hill			123681	HILL R 12354
12	22	400	Peter	Gill			123706	GILL P 12355
13	23	200	Dave	Johnson			123731	JOHNSON D 12356
14	24	400	Archie	Jones			123756	JONES A 12357

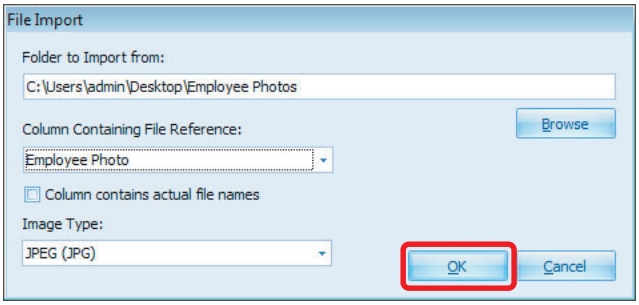
7. On the Field Links window, to map the data fields:
   a. Select a **Import Source Field**, and then the corresponding **Template Field** to link.
   b. Click **Add**.



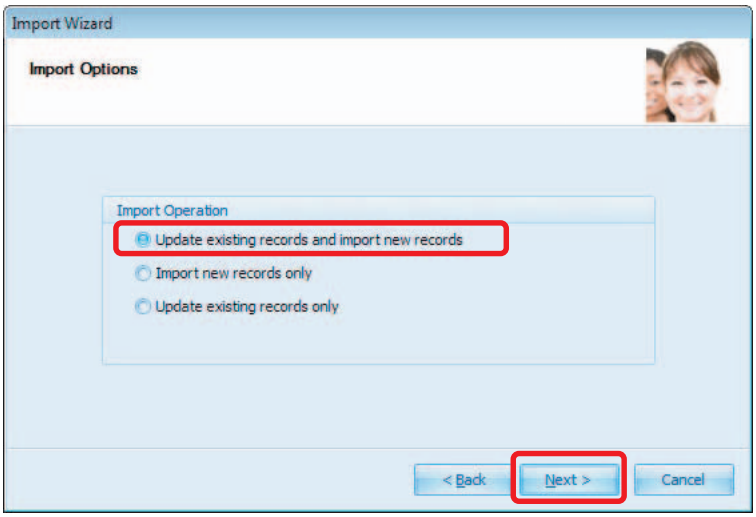
8. Select a Field from the **Field Links** and click **Mark Unique**. A unique field separates each record so there are no duplicates.

9. To import a image:
   a. Select a Image Field.
   b. Click **Image File Import**.
   c. Click **Browse** to locate and select the image file to be imported.
   d. Select the **Column Containing File Reference** option, if this applies.
   e. Specify the image **File Type**.

   Note: Importing an image file in this manner removes any preexisting photo links into the wizard. When importing a CSV source, photos need to be retrieved from an external folder.



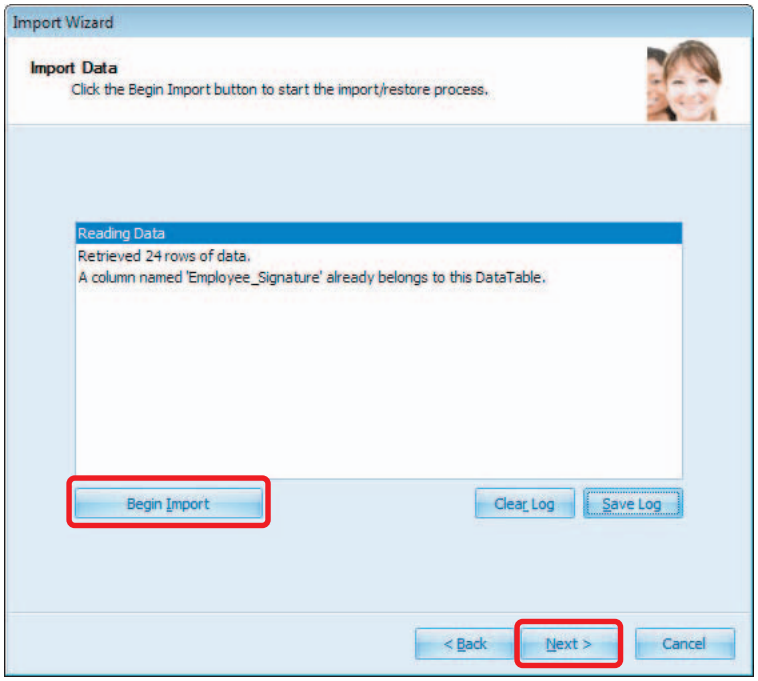
10. Click **Next** on the Wizard Field Links page.
11. On the **Import Options** window, select the Update existing records and import new records option.



12. Click **Next**.
13. Click **Begin Import** to update existing records.

    Note: As the update is performed, the log is displayed in the window.

14. Click **Next** when complete.



15. The import is complete. Click **Finish**.

Note: The Data Entry records are added/updated with these changes.

4.4 Data Entry View tab

The **Data Entry View** tab, contains all the tools to customize the views, including customizing the record layout. For detailed information on the **View** tab, see the *Asure ID Reference Guide, Section 4 Data Entry Application* (PLT-01797)

Records can be viewed as a single/multiple view or in a table format.

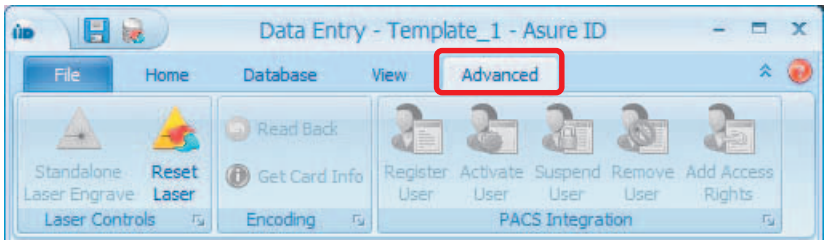
4.5 Data Entry Advanced tab

The **Data Entry Advanced** tab, contains the advanced options that may be installed on the printer. If the options are not installed they are grayed out.

Advanced options are:

- Laser Controls
- Encoding
- PACS Integration

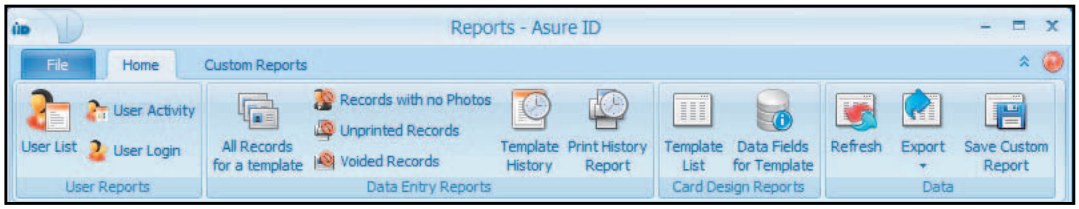
For detailed information on these options see the *Asure ID Reference Guide, Section 4 Data Entry Application* (PLT-01797).



Section 5

5 Reports Application

The **Reports Application** provides you with preformatted reports of application operation. Reports can also customize in terms of layout, columns, and filters, which can be saved for future use.



5.1 User Reports

- **User List:** This report contains all users, capabilities, and general information.
- **User Activity:** This report contains all the detailed user activities.
- **User Login:** This report contains all user login activity.

5.2 Data Entry Reports

Note: Right-click on any column heading in a report, for additional Column options. for more options. Columns can be rearranged or removed as required.

- **All Records for a Template:** This report contains all records (and associated data fields) for a selected template.
- **Records with no Photos:** This report contains all records (and associated data fields without photos) for a selected template.
- **Unprinted Records:** This report contains all records that have not been printed, for a selected template.
- **Voided Records:** This report contains all voided records for a selected template.
- **Template History:** This report contains all user activity for all templates.
- **Print History Report:** This report contains history of all reports printed.

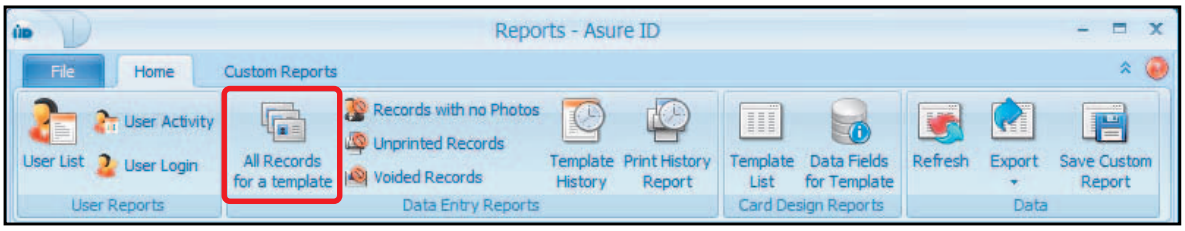
5.3 Card Design Reports

- **Template List:** This report lists all the current templates.
- **Data Fields for Template:** This report lists the data fields for a selected template.

5.4 Create a report

The following is the general process for creating a report.

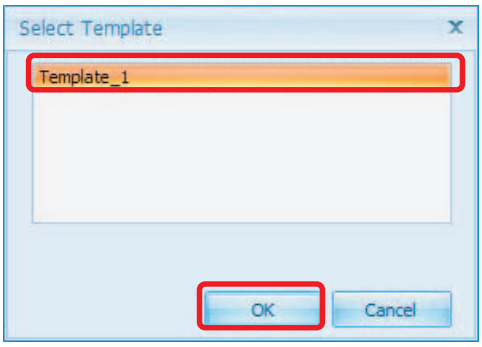
1. Select **Reports** application > **Home** tab > **All Records for a Template**.



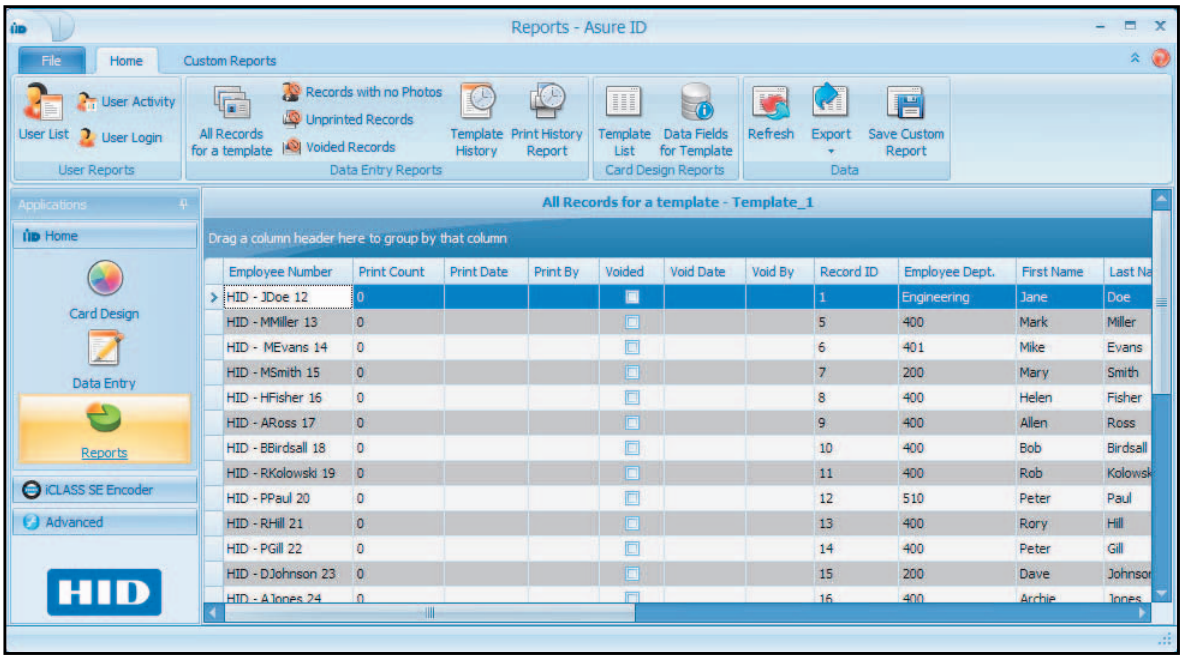
2. Select a template to run the report on.

   Note: This option is only required when needing Record or data entry field information (i.e. Data Entry Reports, or Data Fields for Template report.

3. Click **OK**.



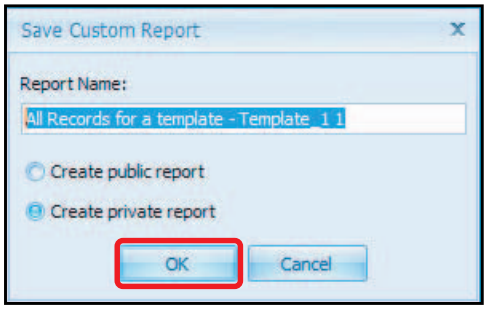
4. The report is displayed. This example is the All Records for a template.



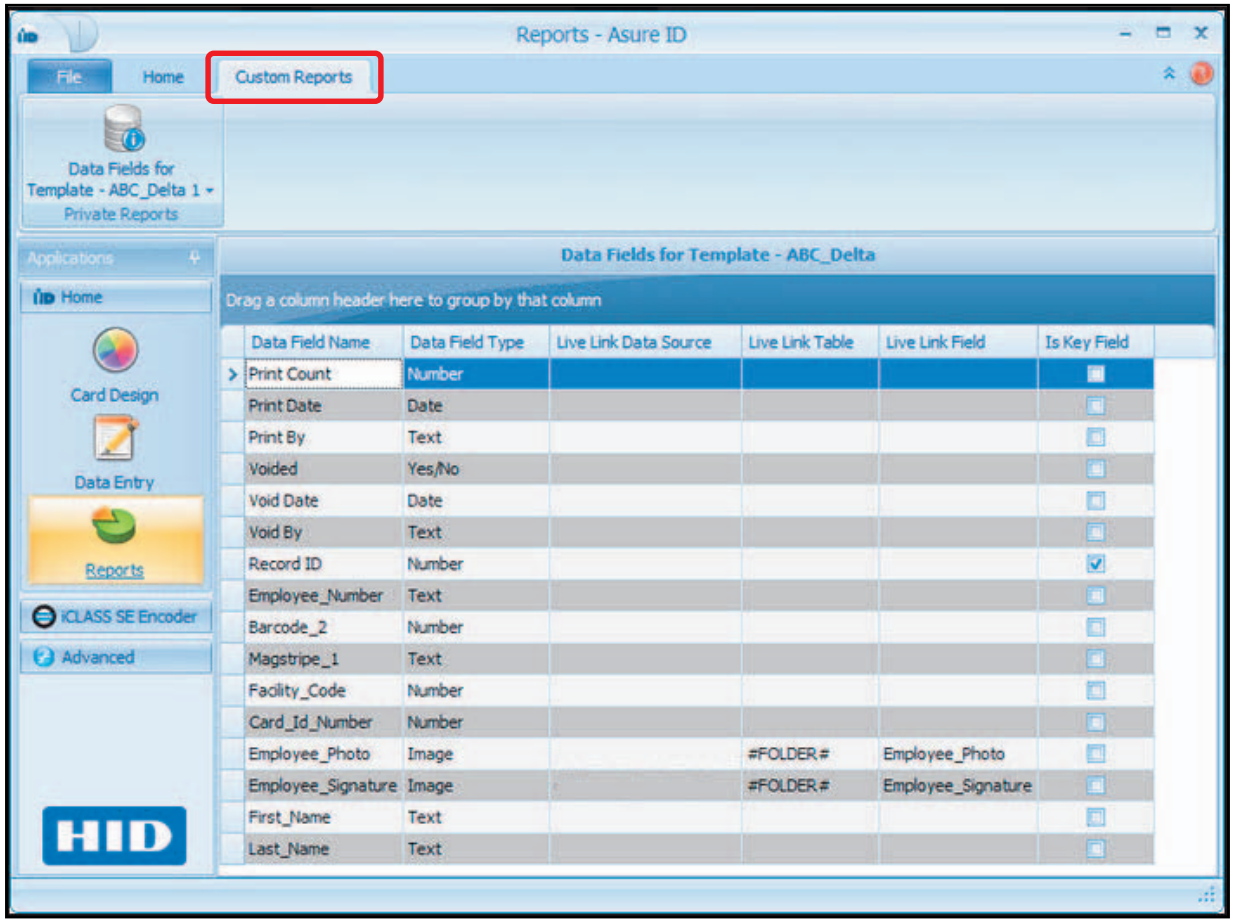
5.5 Custom report

A custom report is any report that you have run, that you have changed the layout (columns, sorting, etc.) To be able to reuse this report configuration the file can be saved for future use.

1. After the report has been modified, select **Save Custom Report** from the toolbar.



2. Name the report and select **Create Private Report**.
3. Click **OK**.
4. The saved report is displayed under the **Custom Reports** tab.



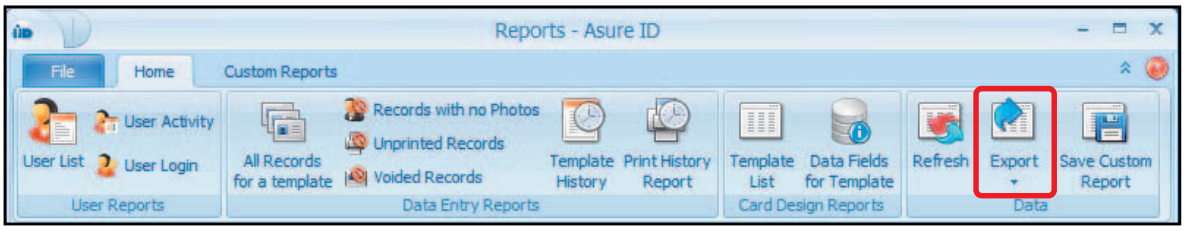
5.6 Export reports

Reports can be exported in the following file types:

- PDF
- XLS
- RTF

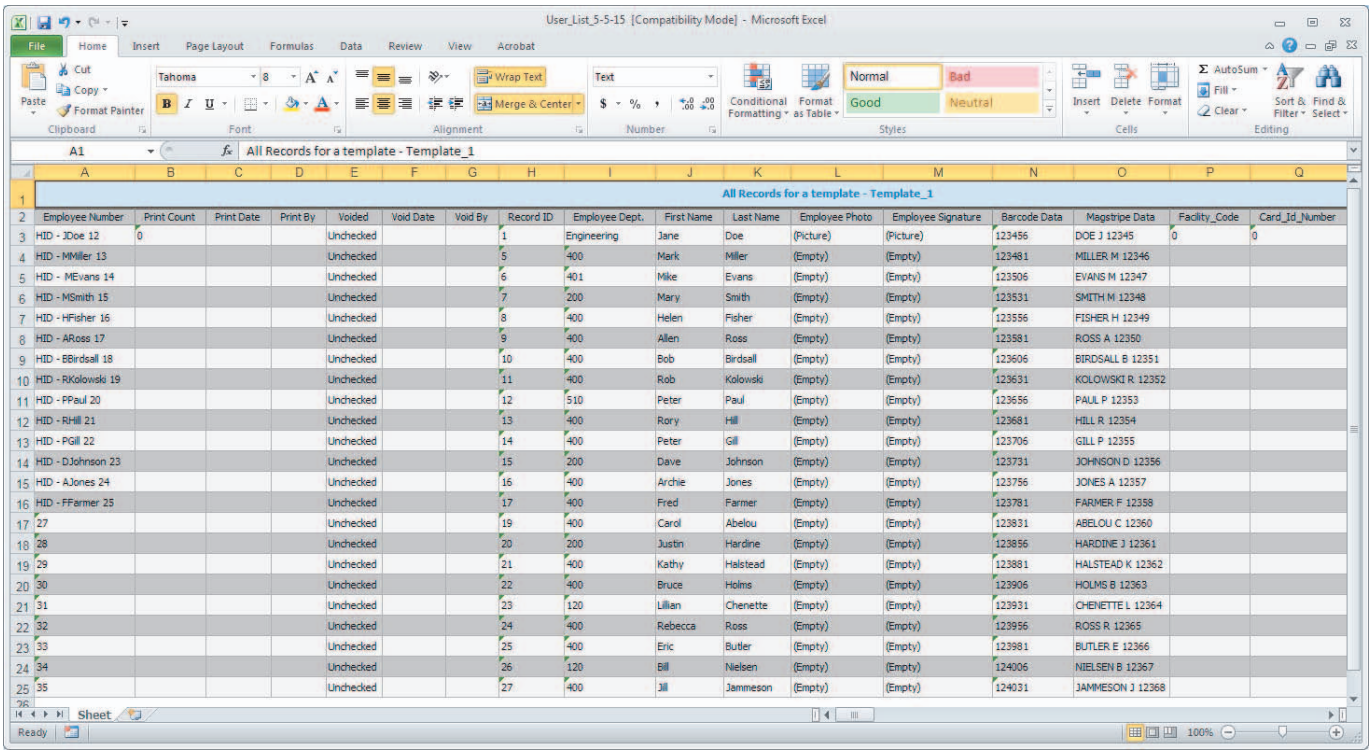
To export a report

1. One a report has been run. Select **Export** from the toolbar.



2. Name and save the file.

   The following example is a user record report exported to XLS (Excel file).



Section 6

6 iCLASS SE Encoder application

6.1 Overview

The **iCLASS SE® Encoder** application is used to encode HID Prox® and read/write applications onto smart cards.

The following matrix illustrates the supported capabilities and card types.

	Program HID Access Control Application			Custom Data		
	Standard PACS Application	**SIO PACS Application**	**Supported Key Types**	**Standard Application**	**SIO Application**	**Supported Key Types**
HID Prox cards and fobs	✓	N/A	N/A	N/A	N/A	N/A
iCLASS®	✓	N/A	Standard/Elite/Custom	✓	Coming Soon	
iCLASS SR	✓	✓	Standard/Elite/Custom	✓		
iCLASS SE	N/A	✓	Standard/Elite/Custom	✓		
iCLASS Seos®	N/A	✓	Standard/Elite/Custom	✓		
MIFARE Classic (not Indala Flexsmart)	✓	✓	Standard/Elite*/Custom*	✓		
MIFARE DESFire EV1	N/A	✓	Standard/Elite*/Custom	✓		

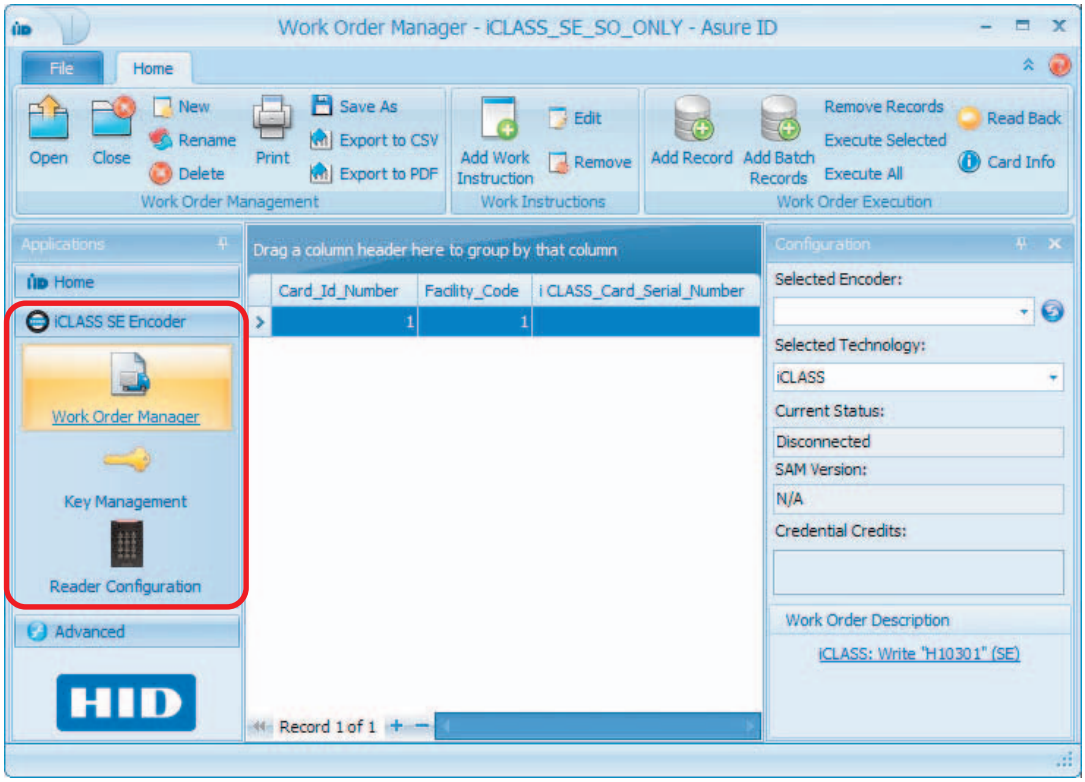
* Only supported for SIO PACS Applications

6.1.1 Credential credit management

All transactions are enabled by credential credits. These are individual credits that are used with every transaction until there are none or until additional credits are ordered and applied to the encoder. For information about ordering credentials, see the HID Global Credential Programmer How to Order Guide, which can be found on **www.hidglobal.com**.

6.2 iCLASS SE® Encoder application modules

The iCLASS SE Encoder application contains three modules.



6.2.1 Work Order Manager module

The Work Order Manager module allows you to define and save an encoding profile for a credential deployment. Each Work Order defines the number of data fields encoded, as well as the data type and field size. These data fields are concatenated into a single data stream and encoded into an application, and are defined by the selected format.

A Work Order is comprised of one or many Work Instructions. A Work Instructions is a single command issued during work order execution. The single work instruction can either read or write to a specific memory location.

6.2.2 Key Management module

The Key Management module of the iCLASS SE Encoder allows you to view and manage the HID and Custom Keys. See the *Asure ID Reference Guide, Section 7 iCLASS SE Encoder application* (PLT-01797) module for information on creating custom keys.

Note: Standard Keys and Key Sets are pre-loaded with the Encoder Configuration Package included on the USB stick.

6.2.3 Reader Configuration module

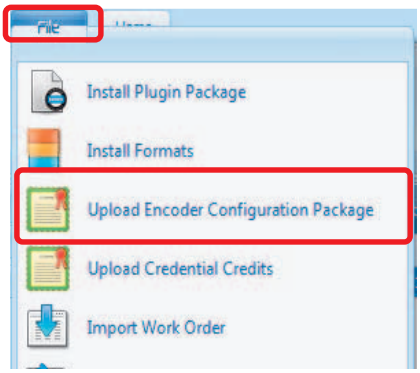
The Reader Configuration window is used to create the Reader Data configuration cards (for both keys and reader limited settings) The application allows you to change the keys or behavior of a Reader.

6.3 Set up the iCLASS SE encoder

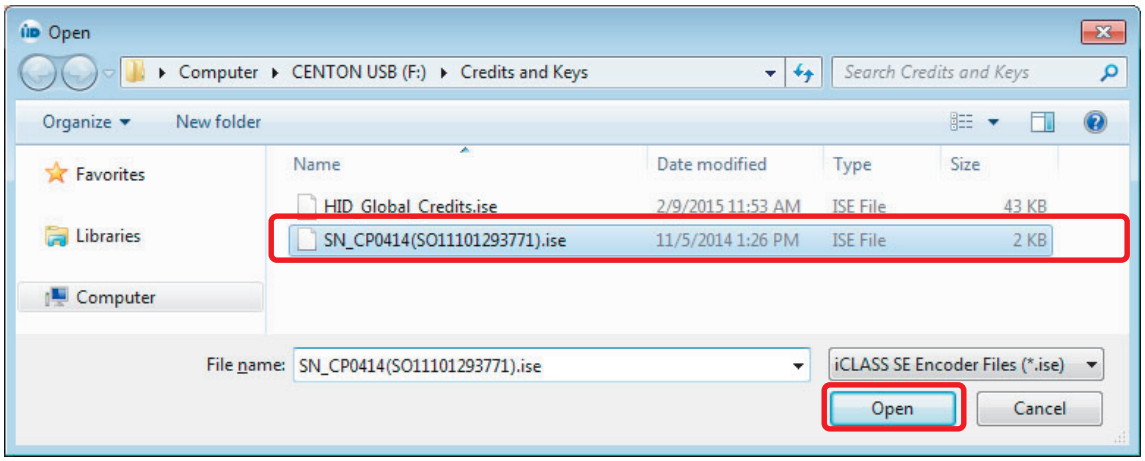
6.3.1 Load the configuration package

Initially you receive the **Credential Credits** and **Keys** either through a configuration package included on the USB stick or in an email. To upload this package:

1. Select **iCLASS SE Encoder** application > **Work Order Manager** module > **File** tab > **Upload Configuration Package**.

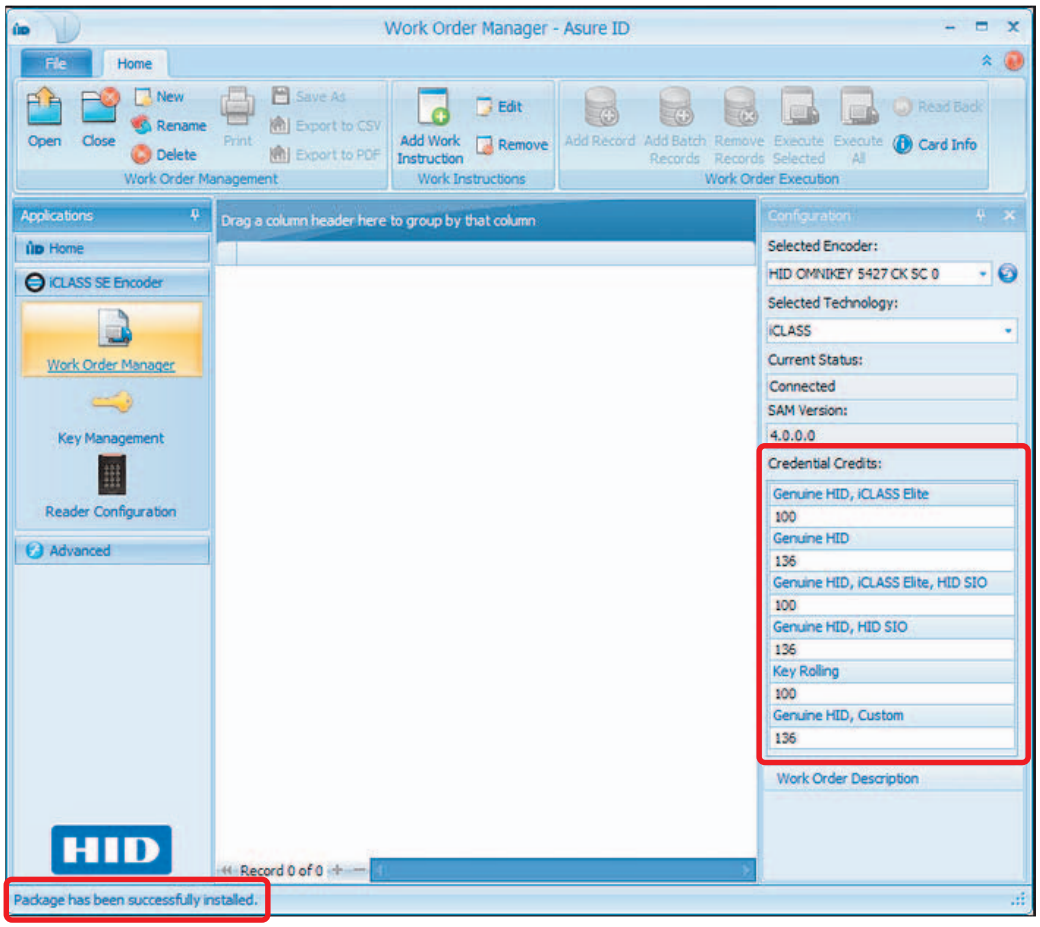


2. Browse to locate the **Configuration Package** from HID.
3. Select the file and click **Open**.



4. A confirmation message is displayed at the bottom of the window and the Credential Credits are displayed in the **Configuration** pane.

   Note: Keys may also be loaded, depending on what was ordered.



6.3.2 Install format

The iCLASS SE Encoder includes a format interpreter capable of parsing all open and custom formats developed and maintained by HID Global.

Format fields are presented to you in the desktop UI for the purpose of assigning data to each field.

Formats must be ordered from Customer Service. Most formats are custom to a specific OEM or end user, and are not freely distributed.

The **H10301** is the default format delivered with the application.

To use a format other than the provided default format.

1. Select **iCLASS SE Encoder** application > **Work Order Manager** module > **File** tab > **Install Formats**.
2. Browse to locate the Format file from HID. Select the file and click **Open**.
3. After the format is successfully loaded, the new format is displayed as an option when creating a Work Order.

6.3.3 Create a work order

A **Work Order** is comprised of one or many **Work Instructions**. A **Work Instruction** is a single command issued during work order execution. The single work instruction can either read or write to a specific memory location.

See *Section 6.4 Use case 1: deploy standard security credentials* or *Section 6.5 Use case 2: deploy HID Prox credentials* for two common Use Case scenarios. For detail information on all Work Order configurations, see the *Asure ID Reference Guide*.

6.4 Use case 1: deploy standard security credentials

This use case addresses the deployment of the legacy HID Access Control Application on iCLASS credentials. This application is the predominant application in use in the market for the last decade. The use case also addresses the lesser used legacy HID MIFARE application.

Note: The procedures in this use case assume readers are already configured with standard security keys for iCLASS and MIFARE SIO and have the iCLASS and MIFARE SIO data model interpreters.

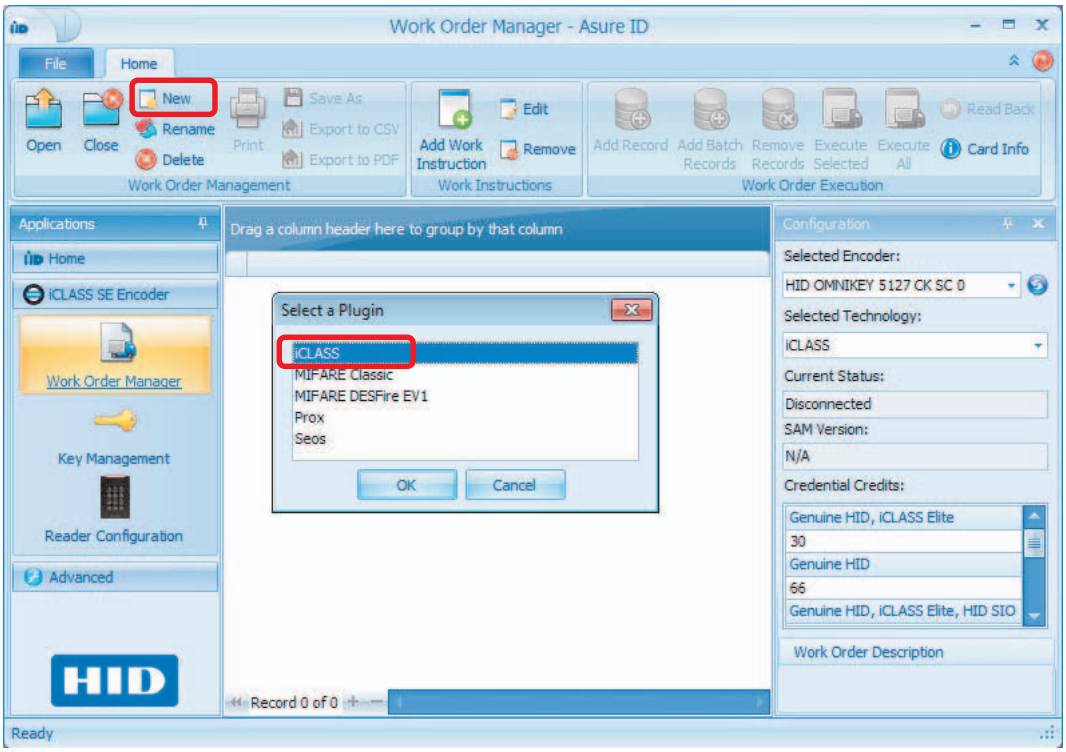
Note: For more detailed information, see the *Asure ID Reference Manual*.

6.4.1 Create a work order to encode iCLASS credentials

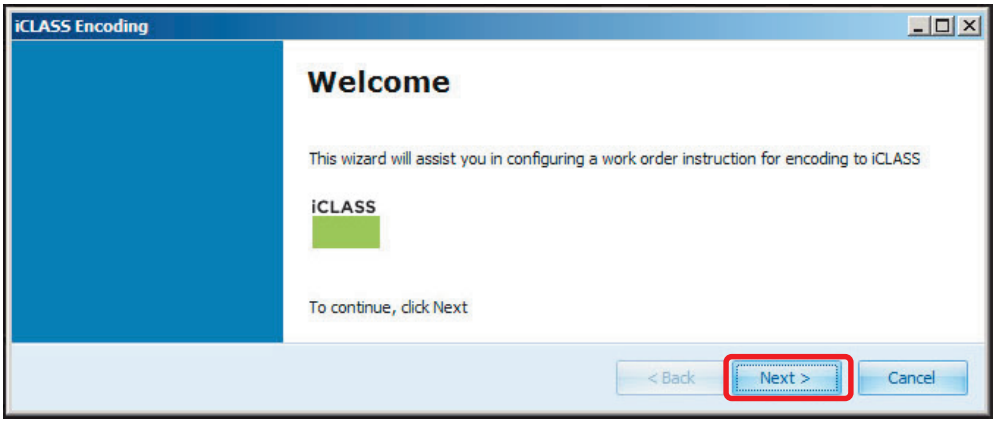
Create a new work order for iCLASS credentials

Creating a new work order begins the definition of a work instruction through a technology specific wizard plugin exposing many user selectable options.

1. Select **iCLASS SE Encoder** application > **Work Order Manager** module > **New**.
2. Select the **iCLASS** plugin and click **OK**.



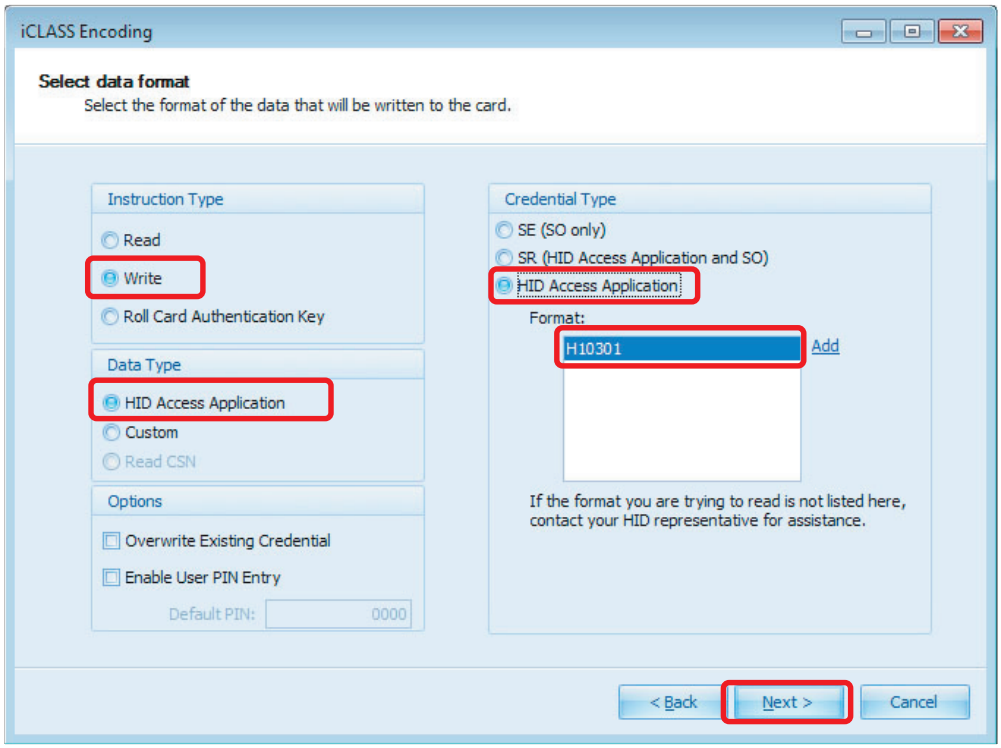
3. The **iCLASS Encoding** wizard opens. Click **Next**.



4. Set the options on the **Select data format** page. This page shows options to set up the instruction.

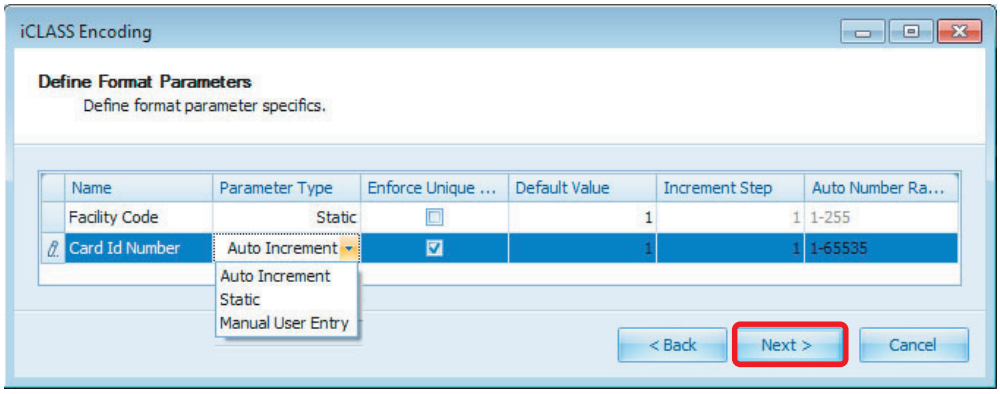
   In this use case we are selecting:

   - **Instruction Type:** Write
   - **Data Type:** HID Access Application
   - **Options:** No selection
   - **Credential Type:** HID Access Application
   - **Format:** H10301



5. Set the options on the **Define Format Parameters** page.

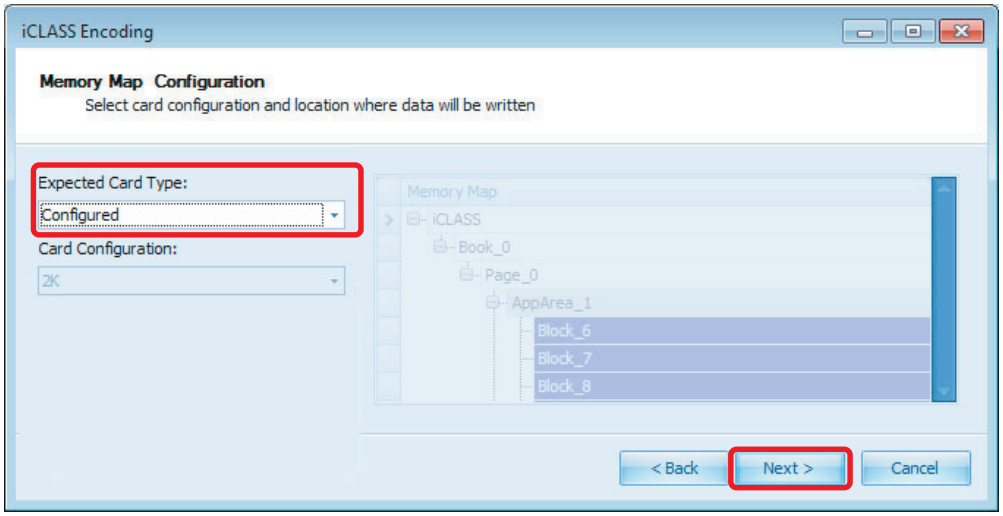
   This page exposes options to customize the selected format. In this use case we are seeing the details of the H10301 format, which is the open, 26-bit SIA Wiegand format.



Field/Column	Description
Name	The name field displays the names of the format parameters as assigned by HID. It is strongly recommended to leave these names as they are.
Parameter Type	This field identifies the rules regarding how the value of a parameter is derived. These are read from the format file and there is typically no need to change.
Static	This parameter type means every encoded credential has the value of the *Default Value* field for that parameter.
Manual User Entry	This parameter type starts with the value of the *Default Value* field and allows you to enter a new number.
Enforce Unique Numbers	This field ensures that a number can never be repeated. For best practice, it is recommended to keep this checked for the Card ID Number.
Default Value	This field only has meaning for the *Static* and *Manual User Entry* parameter types. Auto Increment parameter type uses the *Auto Number Range* field.
Increment Step	This field determines the step for format parameters that are of the *Auto Increment* parameter type.
Auto Number Range	This field shows the allowable numbers that can be encoded for *Auto Increment* parameter Types. In the case of the H10301 format, the Card ID Number is open and untracked. This means all numbers for that parameter (16-bit number) are available. However, all Corporate 1k, proprietary, and open-managed formats have a Card ID parameter with a number range set in the format file that is determined when ordering the format.

6. Set the options on the **Memory Map Configuration** page.

This page shows options to set the memory configuration of the iCLASS card.

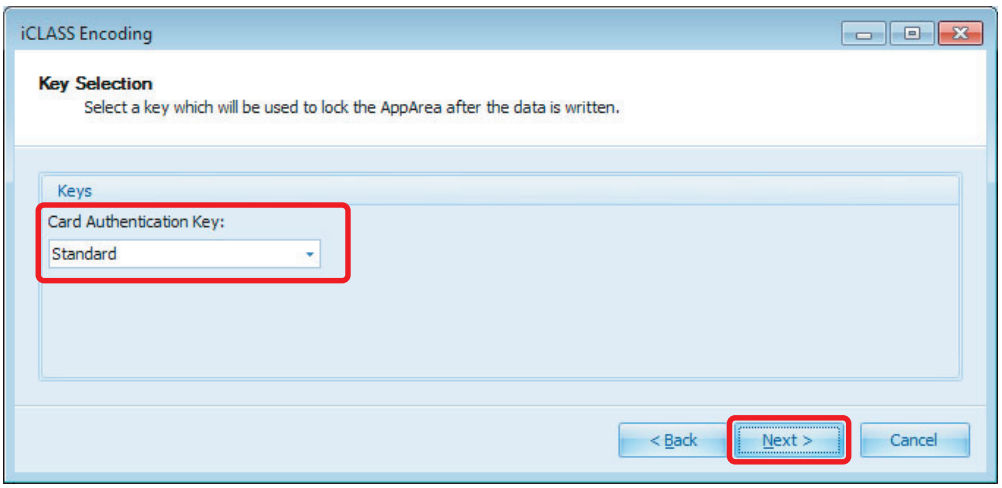


Typically, encoding of iCLASS credentials is done with pre-configured credentials from HID (2k, 16x2k, etc.). In which case, the **Expected Card Type** is **Configured** and there are no further selections to make.

In some rare use cases, the encoder can be used to configure a virgin iCLASS credential. In this case the **Expected Card Type** is set to **Unconfigured** and the **Card Configuration** must be selected from the supported list and match the credential type used.

7. Set the options on the **Key Selection** page.

   This page exposes options to select the media keys used to authenticate with the HID Application on the iCLASS credential.



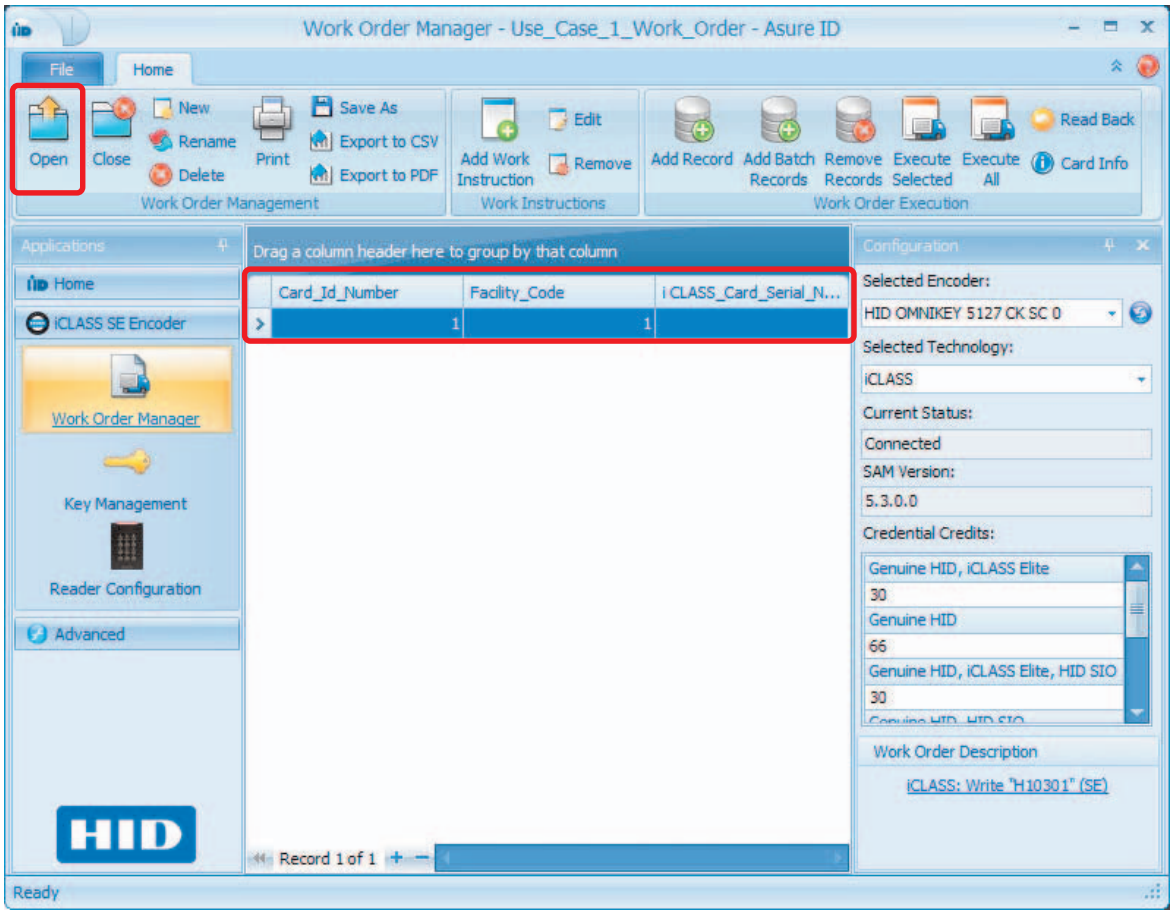
   In this use case we are using **Standard** security media keys. Elite or Custom media keys (if they are loaded) are also selectable at this step.

8. Finish the wizard and save the Work Order.

6.4.2 Encode iCLASS credentials

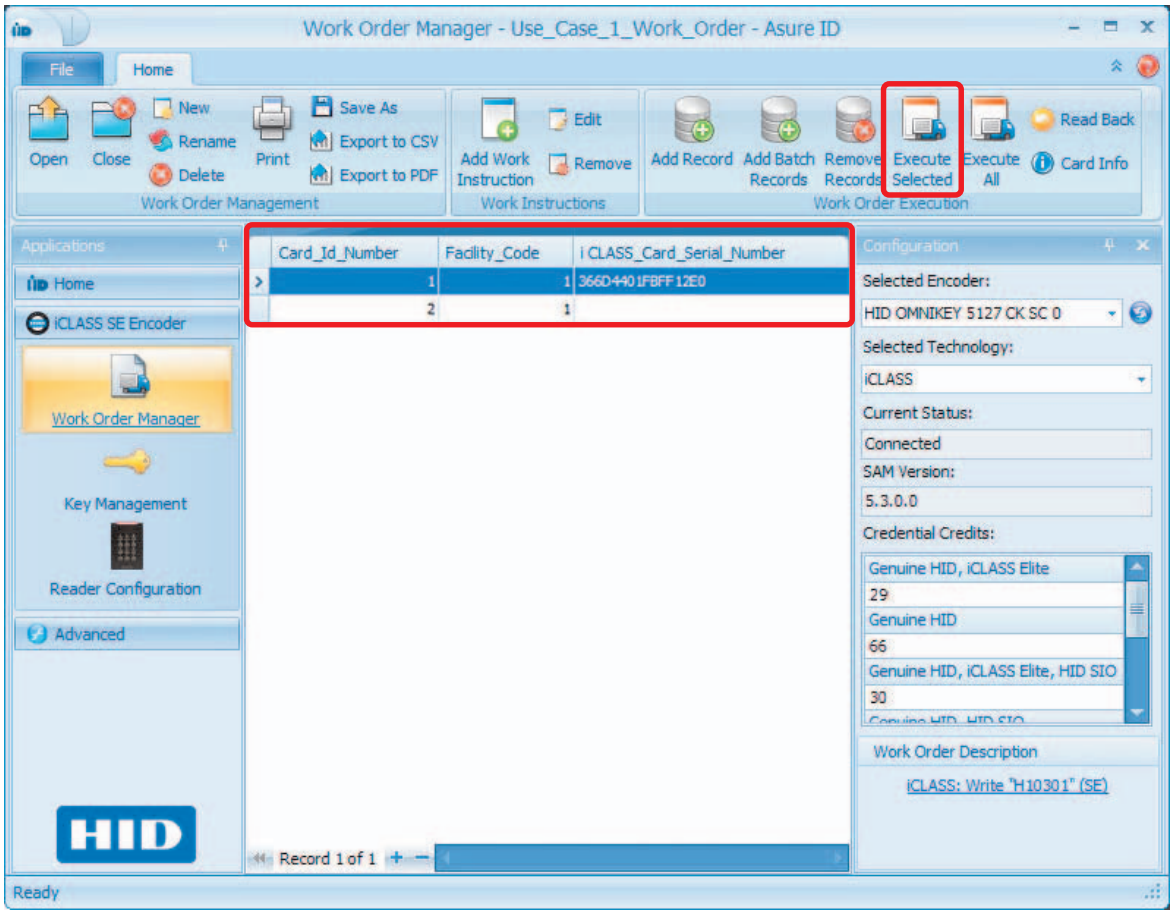
1. When the work instruction(s) are executed, a message displays at the window bottom, the credential serial number displays in the main pane, and a new record becomes available for execution.
2. Open the iCLASS work order to encode from. Select **Open** from the toolbar, and select the Work Order from the list.

   The work order table view shows the first credential ready to be encoded with a Card ID Number value of 1 and a Facility Code of 1.



   In this case, the selected format for the work order is H10301. The Facility Code is a static parameter and we set a default of 1 in the Work Instruction wizard. Every credential is encoded with the value of 1 for this parameter. The **Card ID Number** is *Auto Increment* and increases by one every time a credential is encoded.
3. Select the record and select **Execute Selected** from the toolbar.
4. A status window provides feedback on the progress of the encoding operation.

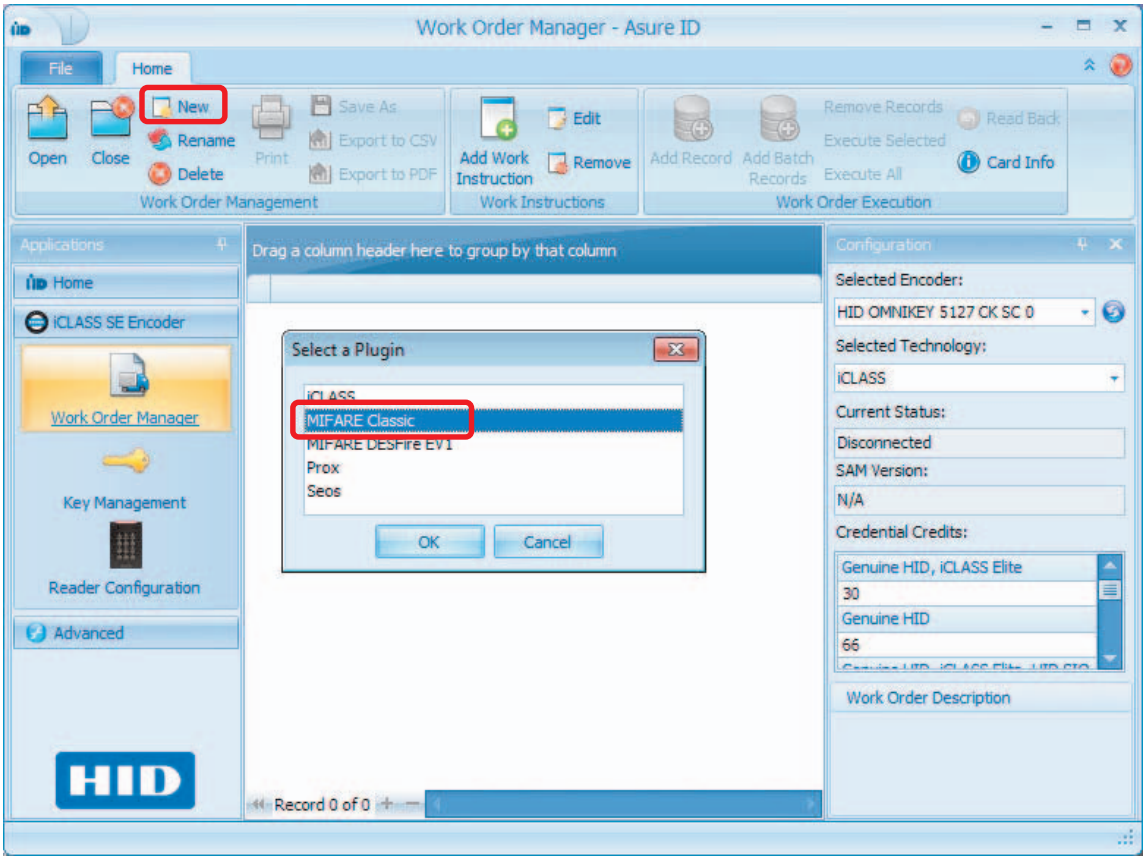
5. After the encoding operation is complete, the work order table view is updated with the **Card Serial Number** and a new record is created with the next **Card ID Number**.



6.4.3 Create a work order to encode MIFARE classic credentials

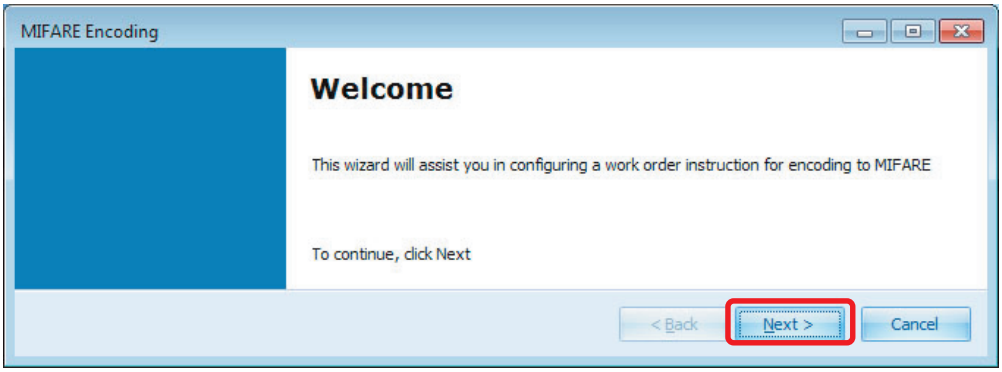
Create a new work order for MIFARE classic credentials

1. Select **iCLASS SE Encoder** application > **Work Order Manager** module > **New**.
2. Select the **MIFARE Classic** plugin and click **OK**.



Creating a new work order begins the definition of one work instruction through a technology specific wizard plugin exposing many user selectable options.

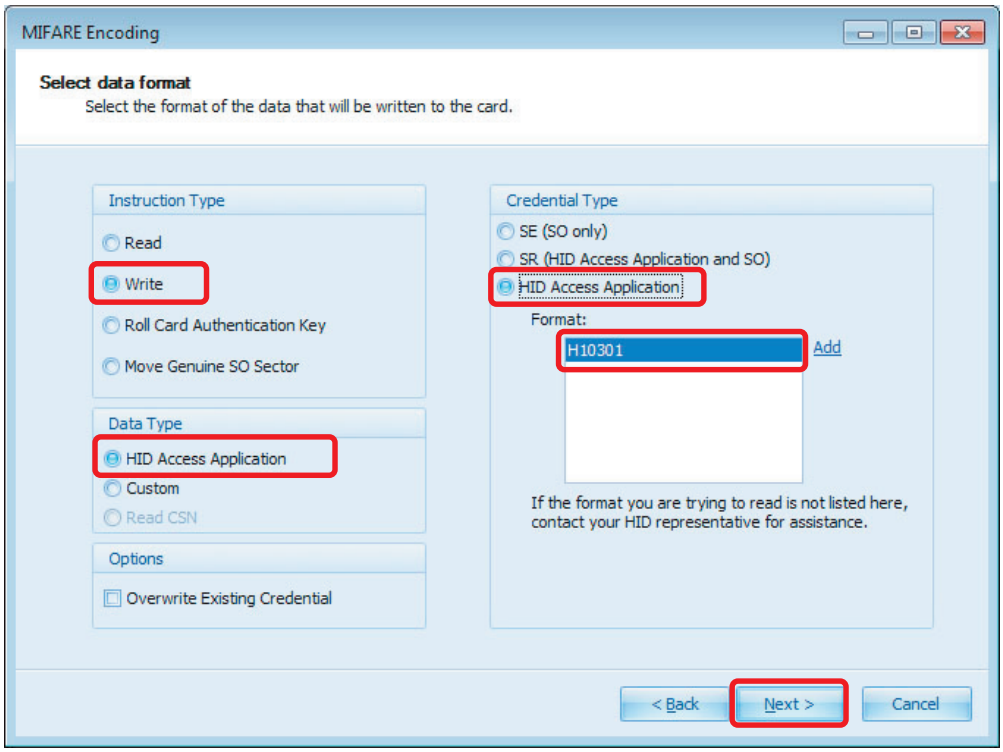
3. The **MIFARE Classic Encoding** wizard opens. Click **Next**.



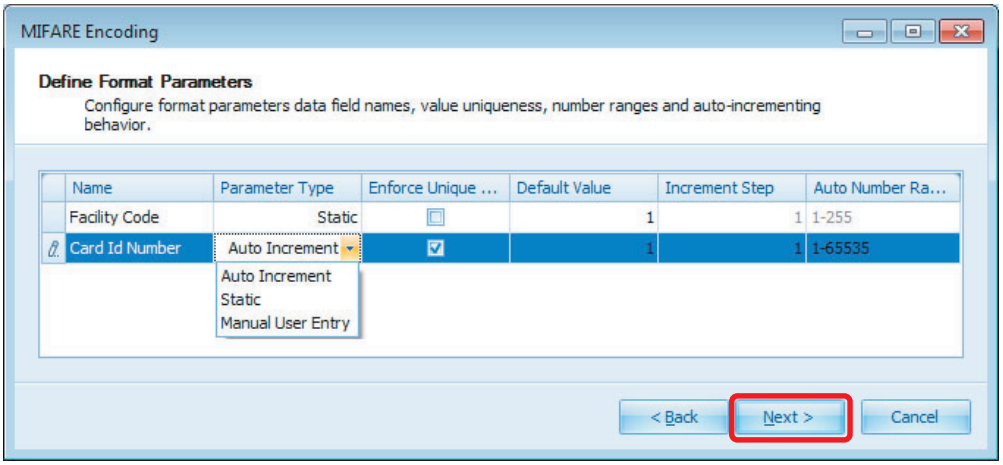
4. Set the options on the **Select Data Format** page.

   This page exposes options to set up the instruction. In this use case we are selecting:

   - **Instruction Type:** Write
   - **Data Type:** HID Access Application
   - **Options:** No selection
   - **Credential Type:** HID Access Application
   - **Format:** H10301



5. Set the options on the **Define Format Parameters** page. See *Section 6.4.1 Create a work order to encode iCLASS credentials*, Step 5.



6. Click **Next** on the **Key Selection** page.

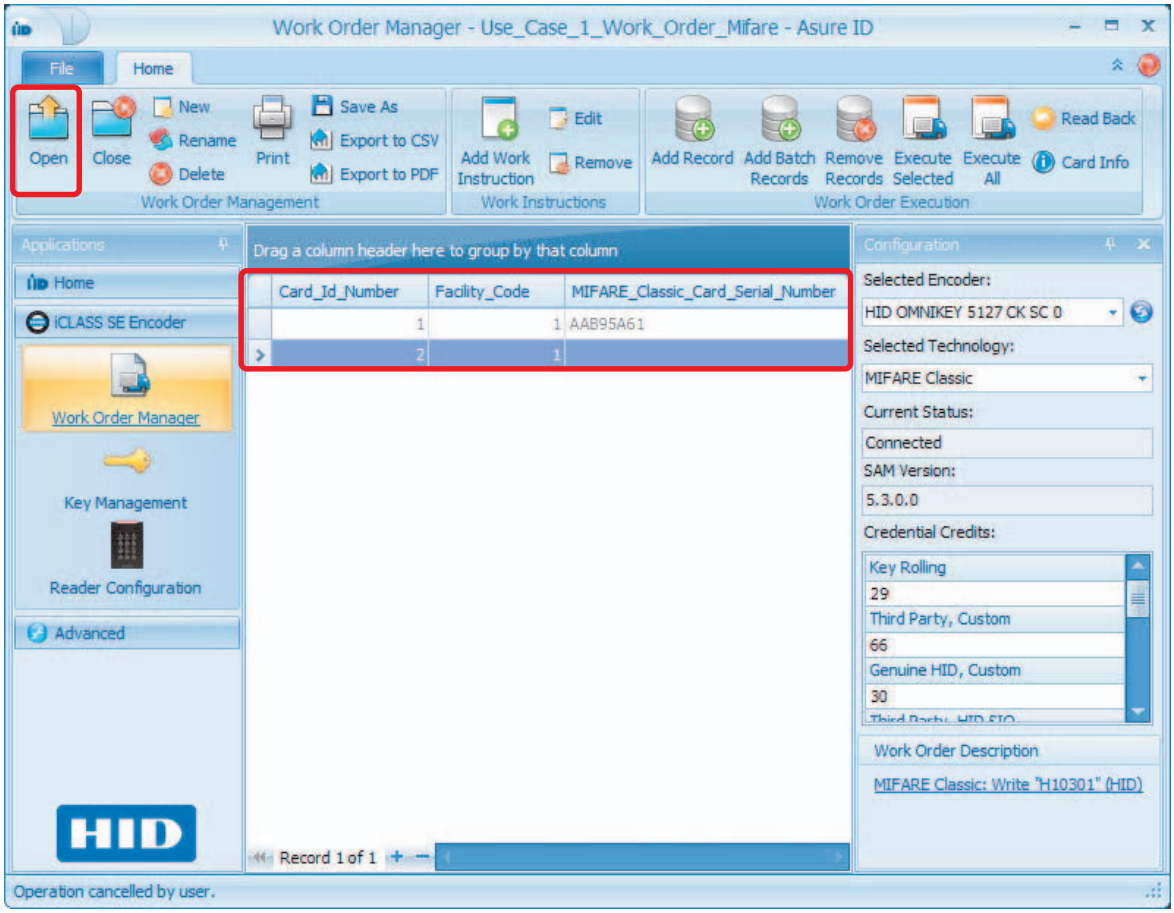
   Note: Sector number and keys used for authentication are fixed and not selectable.

7. Finish the wizard and save the instruction profile.

6.4.4 Encode MIFARE credentials

1. When the work instruction(s) are executed, a message displays at the window bottom, the card serial number displays in the main pane, and a new record becomes available for execution.
2. Open the MIFARE Classic work order to encode from. Select **Open** from the toolbar, and select the Work Order from the list.

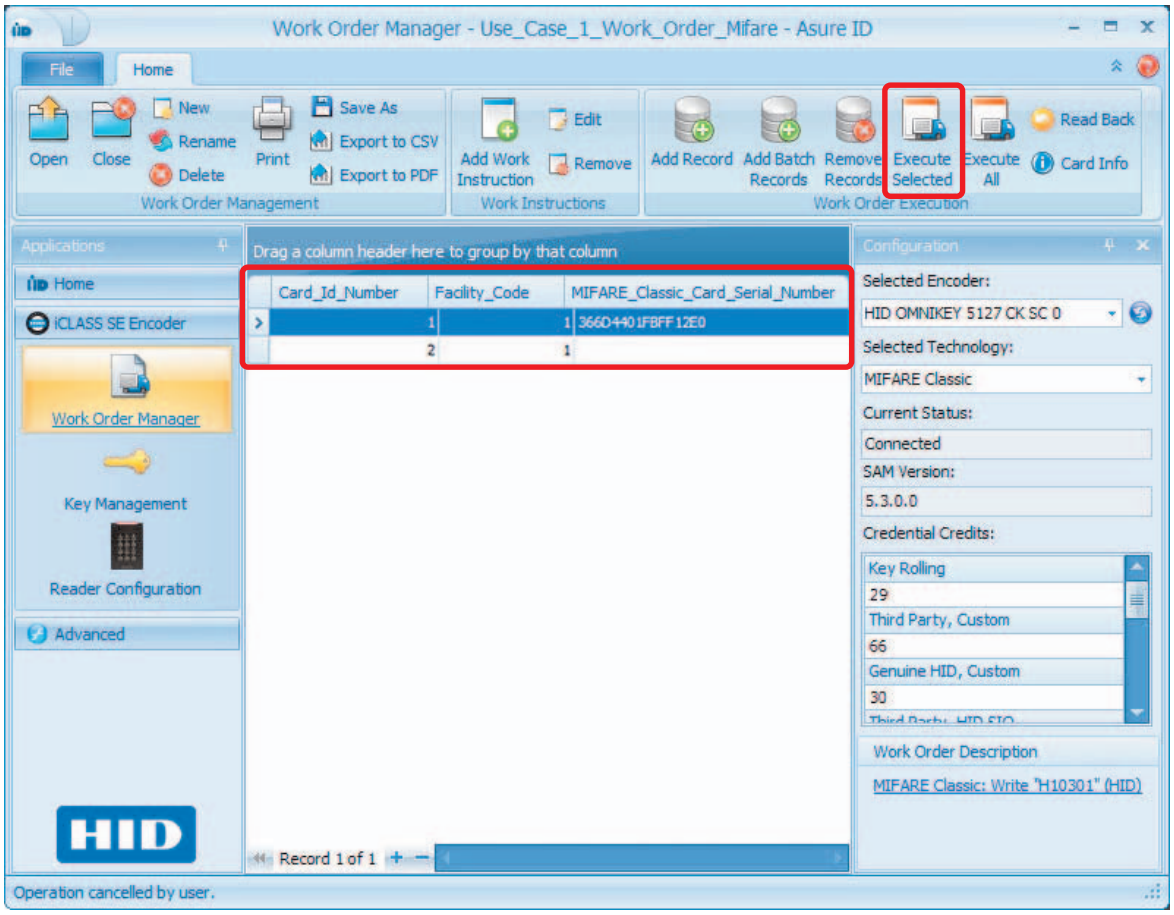
   The work order table view shows the first credential ready to be encoded with a **Card ID Number** value of 1 and a **Facility Code** of 1.



   In this case, the selected format for the work order is H10301. The Facility Code is a static parameter and we set a default of 1 in the Work Instruction wizard. Every credential is encoded with the value of 1 for this parameter. The **Card ID Number** is *Auto Increment* and increases by one every time a credential is encoded. Select the record and select Execute Selected from the toolbar.

3. A status window provides feedback on the progress of the encoding operation.

4. After the encoding operation is complete, the work order table view is updated with the **Card Serial Number** and a new record is created with the next **Card ID Number**.

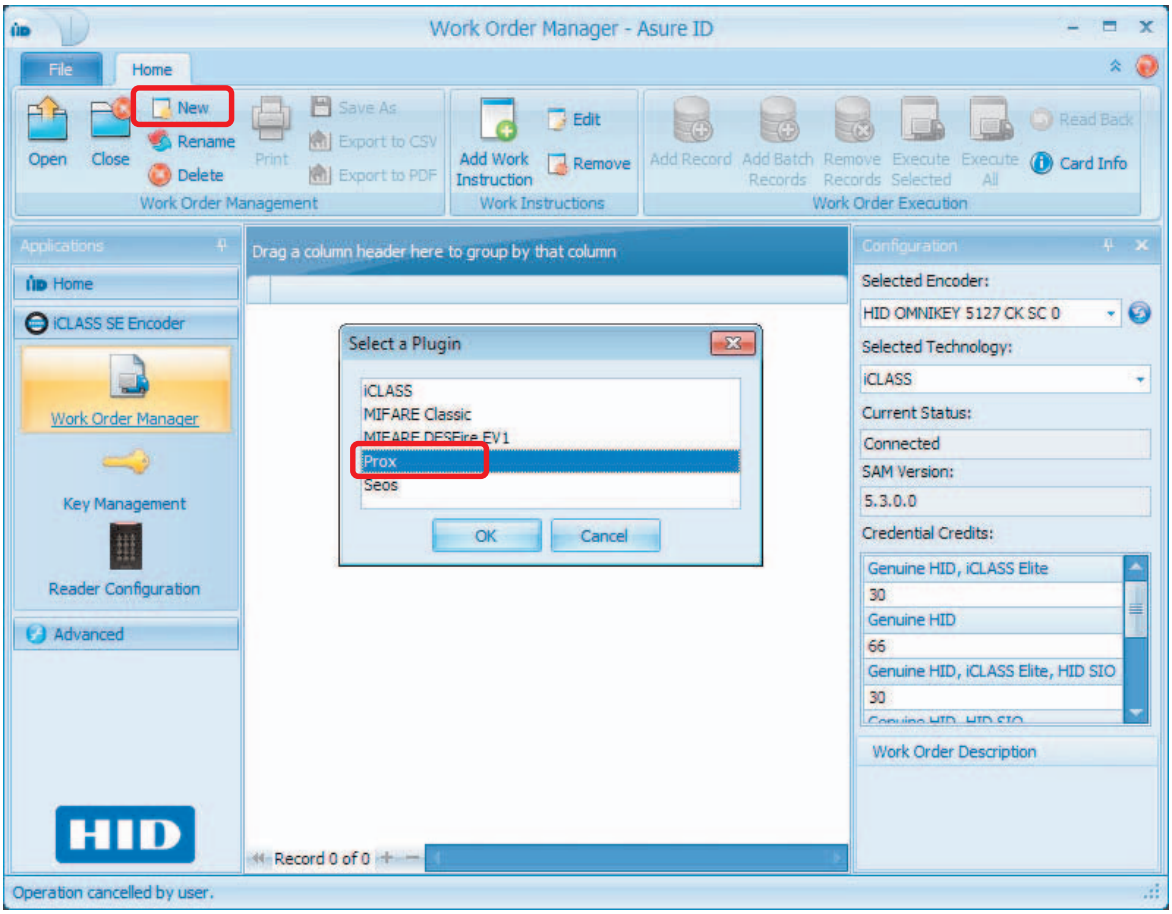


6.5 Use case 2: deploy HID Prox credentials

This use case addresses the deployment of HID Prox cards and fobs.

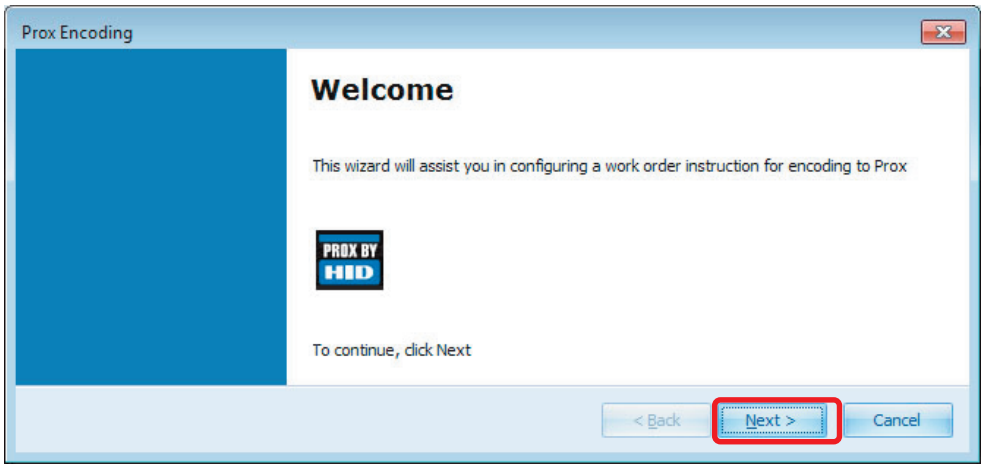
6.5.1 Create a work order to encode HID Prox credentials

1. Select **iCLASS SE Encoder** application > **Work Order Manager** module > **New**.
2. Select the **Prox** plugin and click **OK**.



Creating a new work order begins the definition of a work instruction through a technology specific wizard plugin exposing many user selectable options.

3. The **Prox Encoding** wizard opens. Click **Next**.

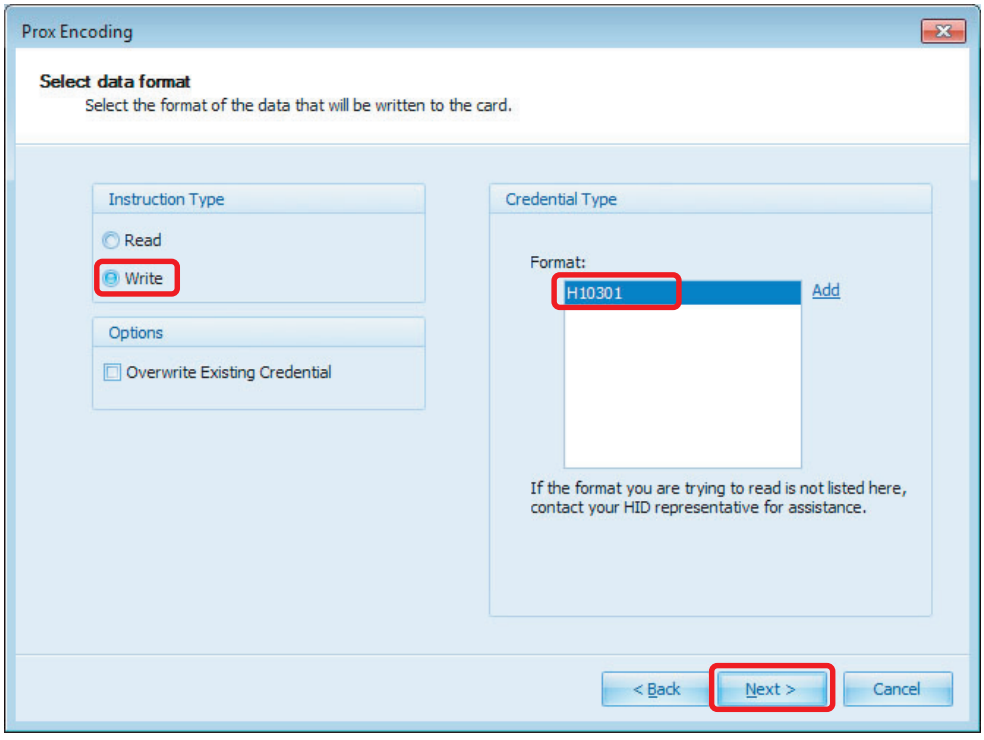


4. Set the options on the **Select Data Format** page.

   This page exposes options to set up the instruction. In this use case we are selecting the H10301 as the **Format**.

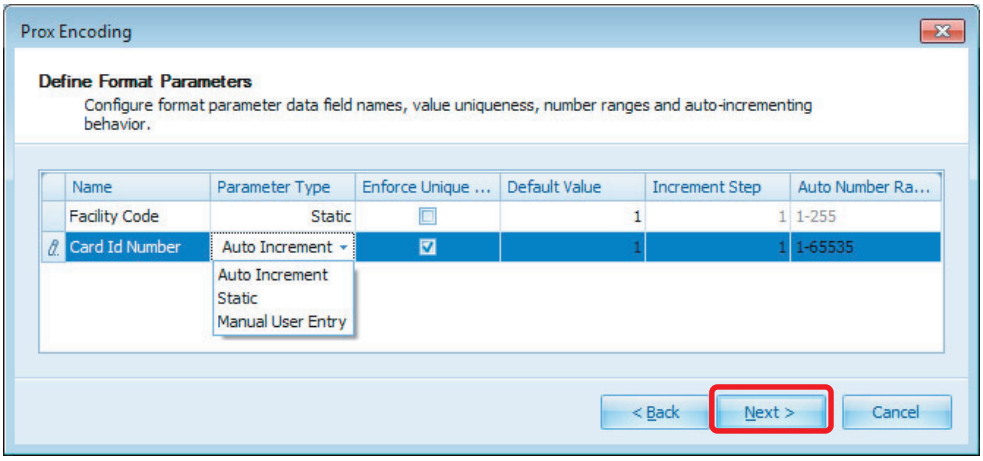
   In this use case we are selecting:

   - **Instruction Type:** Write
   - **Options:** No selection
   - **Format:** H10301



5. Set the options on the **Define Format Parameters** page. See *Section 6.4.1 Create a work order to encode iCLASS credentials*, Step 5.

This page exposes options to customize the selected format. In this use case we are seeing the details of the **H10301** format, which is the open, 26-bit SIA Wiegand format.

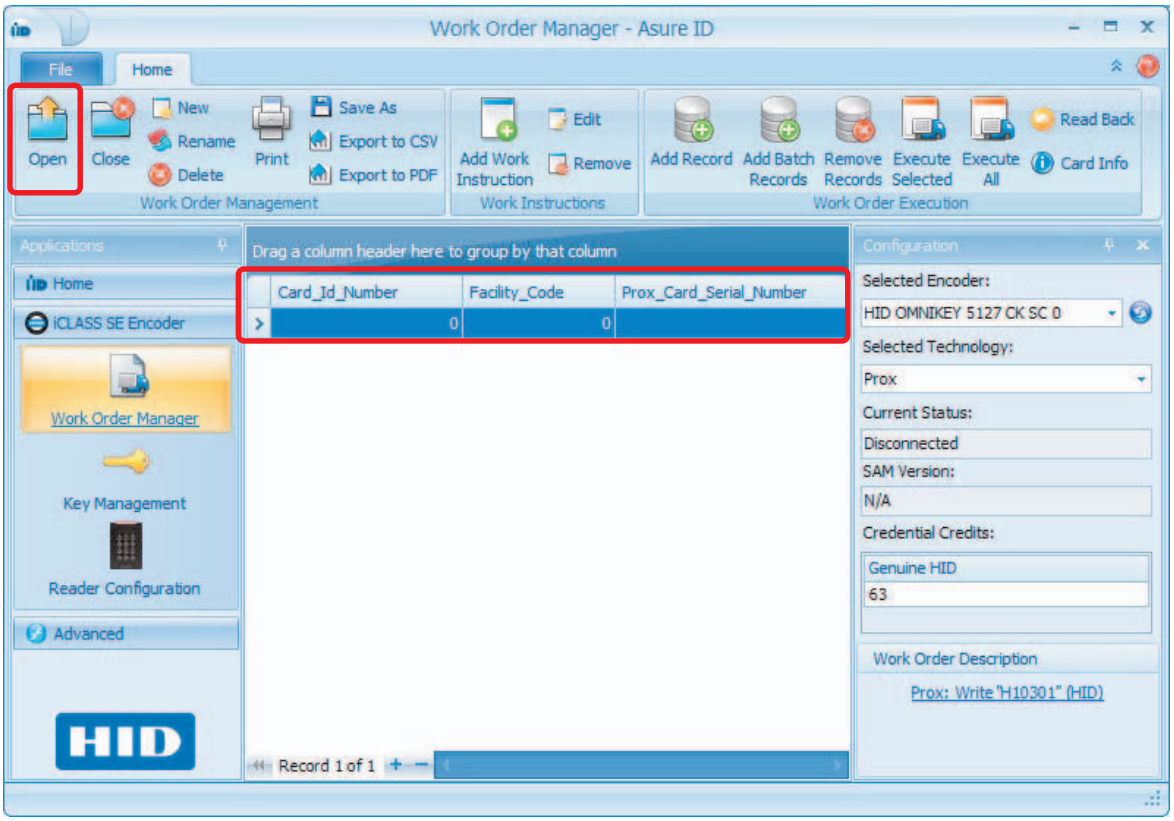


6. Finish the wizard and save the instruction profile.

6.5.2 Encode HID Prox credentials

1. Open the Prox work order to encode from. Select **Open** from the toolbar, and select the Work Order from the list.

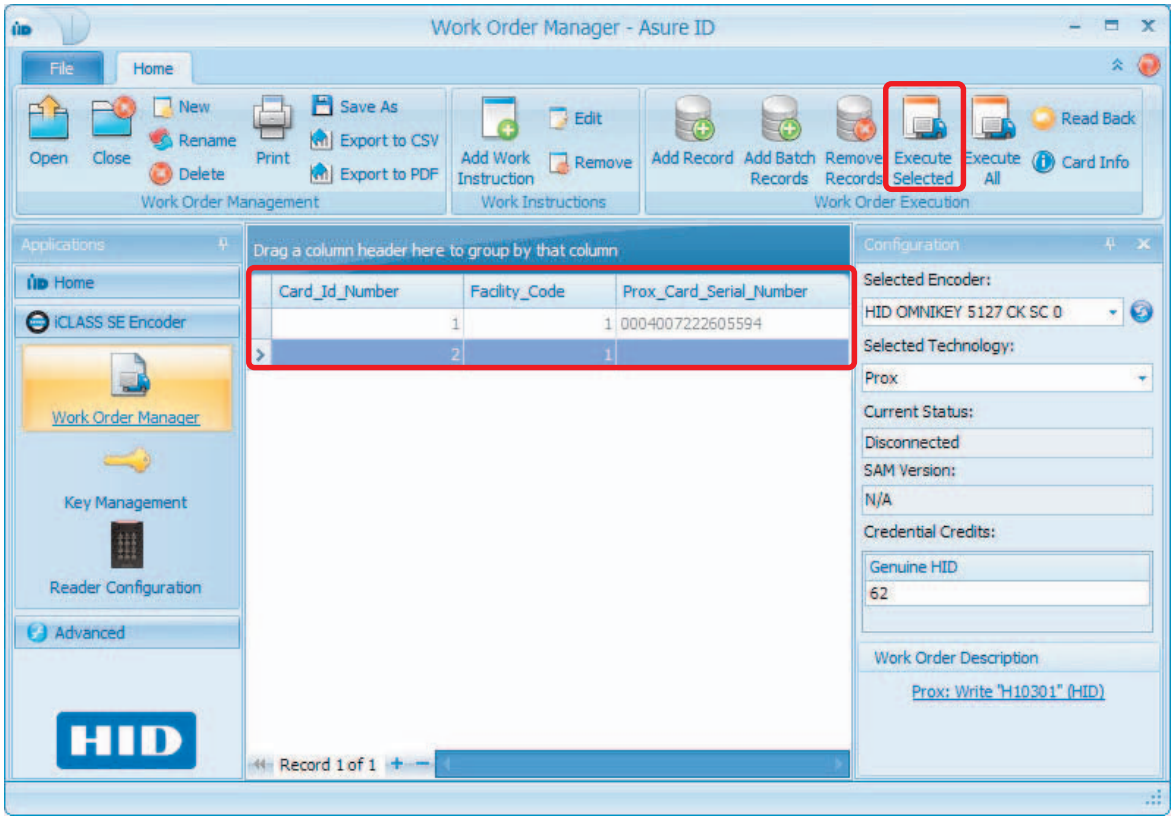
   The work order table view shows the first credential ready to be encoded with a **Card ID Number** value of 1 and a **Facility Code** of 1.



   In this case, the selected format for the work order is H10301. The Facility Code is a static parameter and we set a default of 1 in the Work Instruction wizard. Every card is encoded with the value of 1 for this parameter. The Card ID Number is *Auto Increment* and increases by one every time a card is encoded.

2. Select the record and select **Execute Selected** from the toolbar.
3. A status window provides feedback on the progress of the encoding operation.

4. After the encoding operation is complete, the work order table view is updated with the **Card Serial Number** and a new record is created with the next **Card ID Number**.



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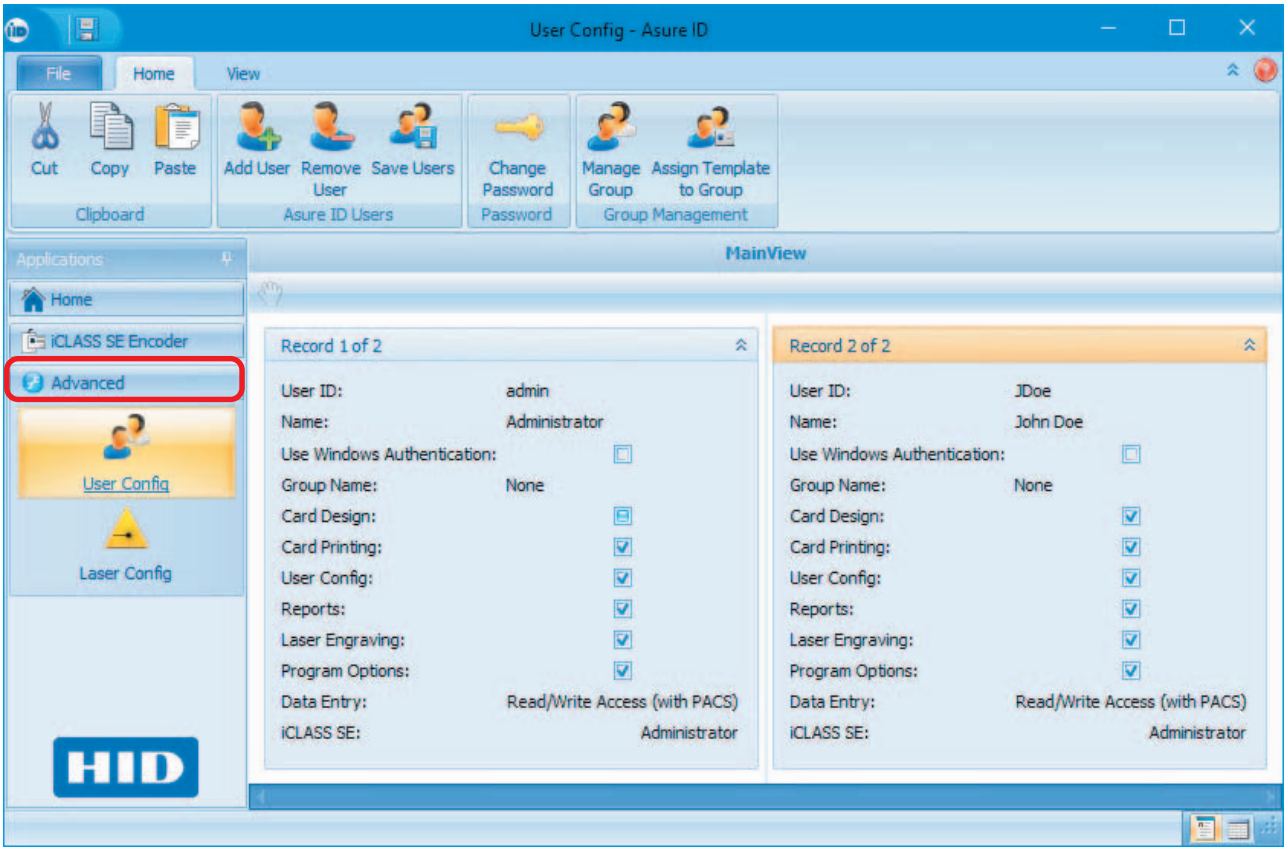
Section 7

7 Advanced application

The Advanced Application is used to manage Users and Laser Printer configurations.

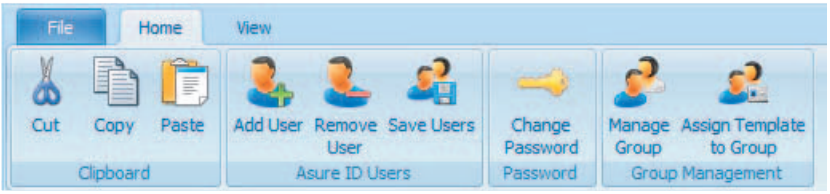
Note: This section covers the basics of the User Config module. For detailed information on the entire Advanced Application, see the *Asure ID Reference Guide*.



7.1 User config module

With the Data Entry application, the Asure ID admin user imports/enters the user information. The Advanced Application allows the Asure ID admin to manage these records.

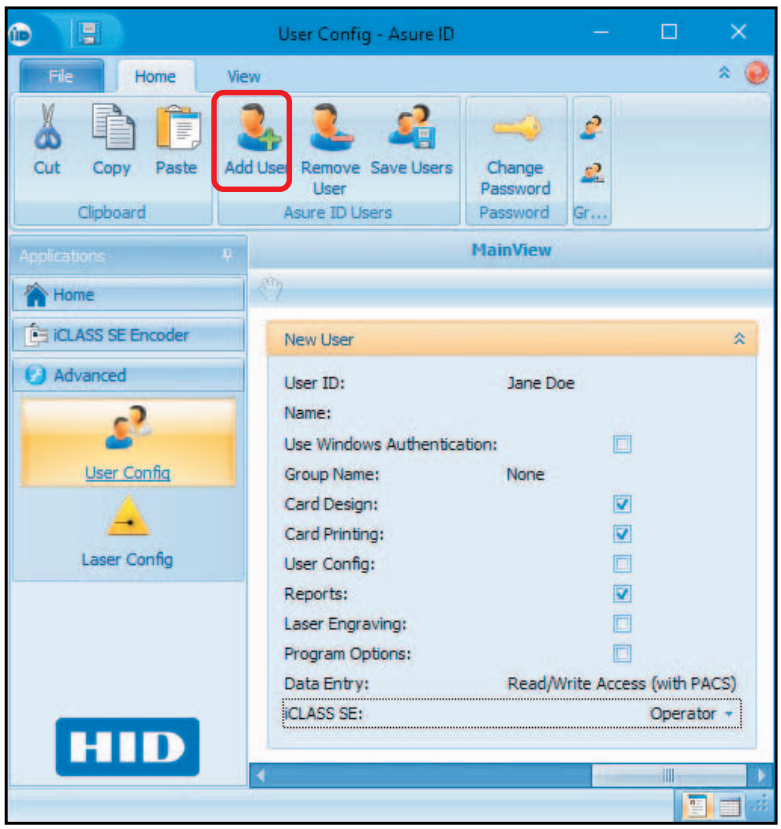
See *Section 4 Data Entry application* for detailed information.



7.1.1 Add a user

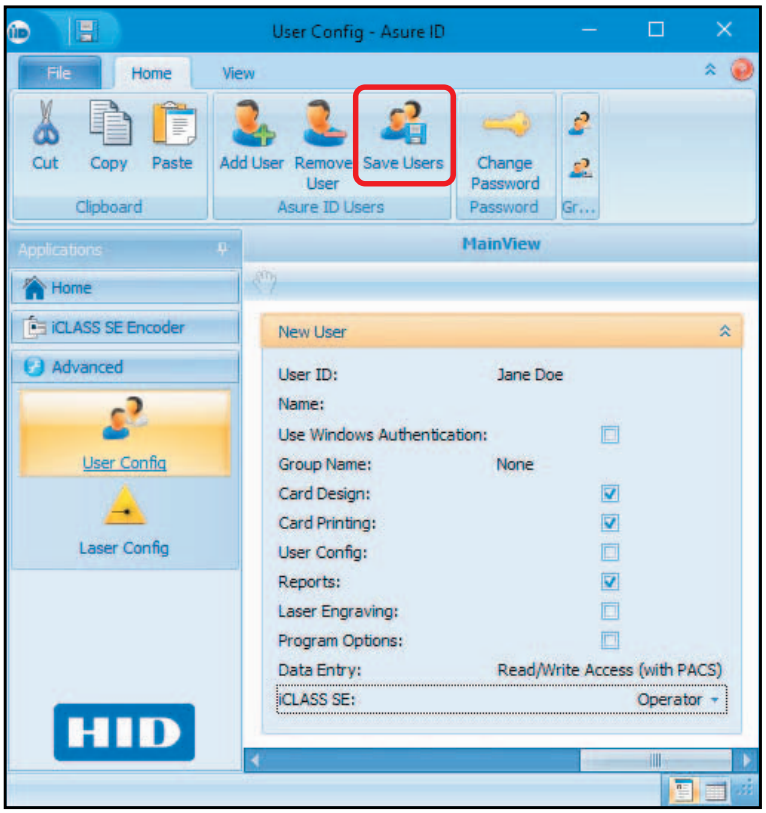
1. Select the **Advanced** application > **User Config** module > **Home** tab > **Add User**.
2. Enter the user information in the blank record.

   Note: Fields become active when the cursor is passed over them.
3. Select the options for this user to have access to. In this example **Card Design**, **Card Printing**, and **Reports** have been selected.
4. In the Data Entry drop-down list, select **Read/Write Access (no PACS)**.
5. In the iCLASS SE drop-down list, select **Operator**.
6. Select **Save Users** from the toolbar. This saves all users that have been modified.



7.1.2 Modify and save a user

1. Select the **Advanced** application > **User Config** module > **Home** tab.
2. Select and modify one or more users as needed.
3. Select **Save Users** from the toolbar. This saves all users that have been modified.

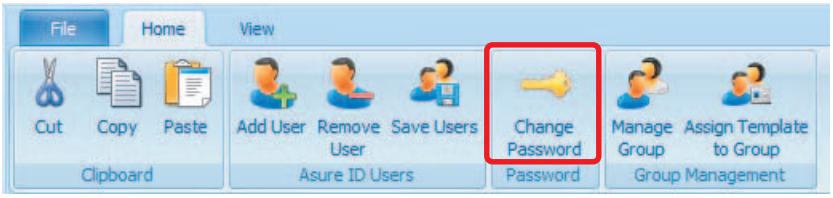


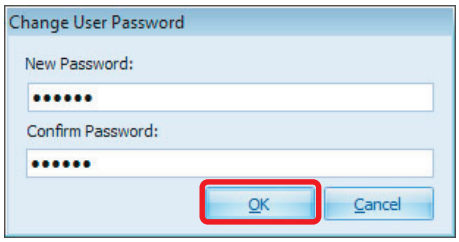
7.1.3 Remove a user

1. Select the **Advanced** application > **User Config** module > **Home** tab.
2. Select a user.
3. Select Remove User from the toolbar, and click Yes to confirm.

7.1.4 Change a user password

1. Select a user record.
2. Select **Change Password** from the toolbar.
3. In the pop-up dialog box, type in the new password and confirm.
4. Click **OK**.



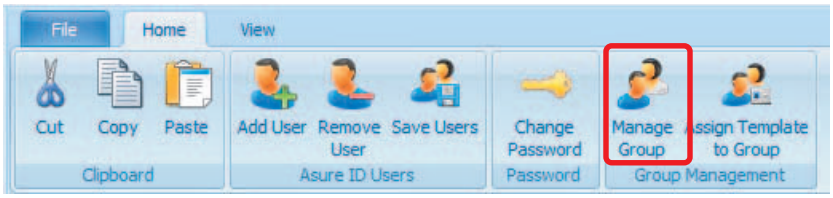


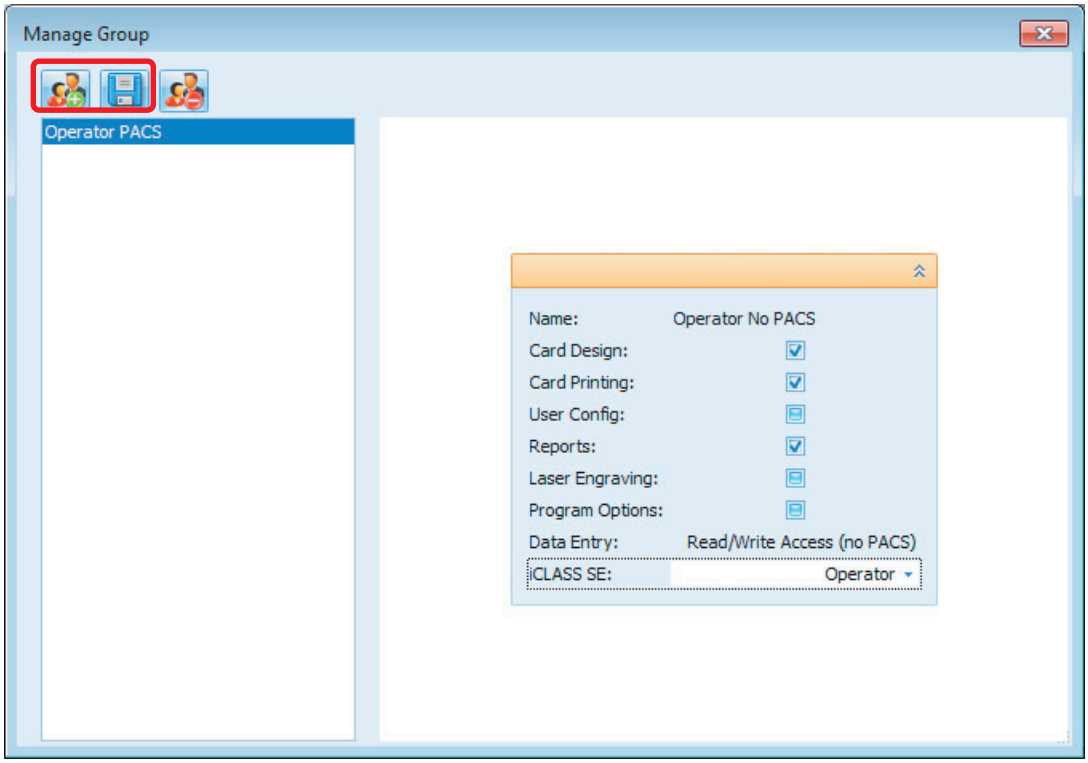
7.1.5 Add a user group

1. Select the **Advanced** application > **User Config** module > **Home** tab > **Manage Group**.
2. In the **Manage Group** window, select the **Add User Group** icon.
3. Enter the group information in the blank record.

   Note: The field becomes active when the cursor is passed over it.
4. Select the options for this group to have access to. In this example **Card Design**, **Card Printing**, and **Reports** are selected.
5. In the Data Entry drop-down list, select **Read/Write Access (no PACS)**.
6. In the iCLASS SE drop-down list, select **Operator**.

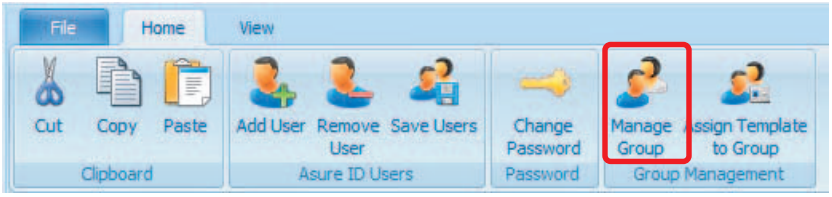
7. Select the **Save** icon. This saves the user group.

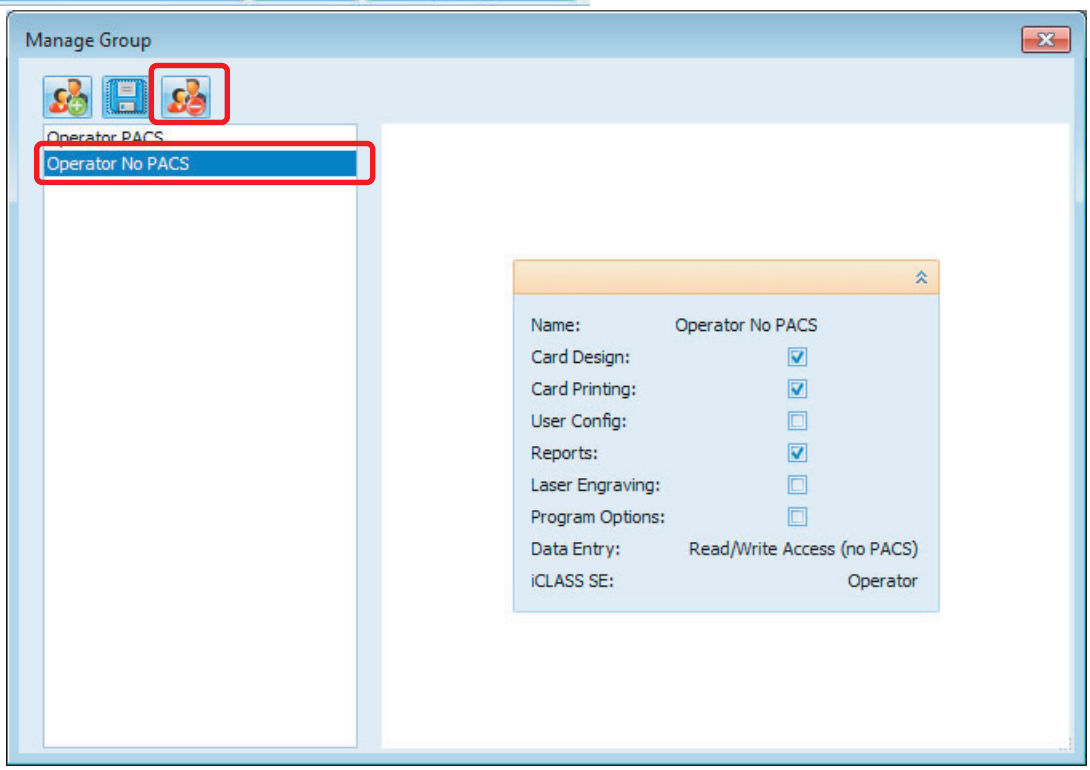


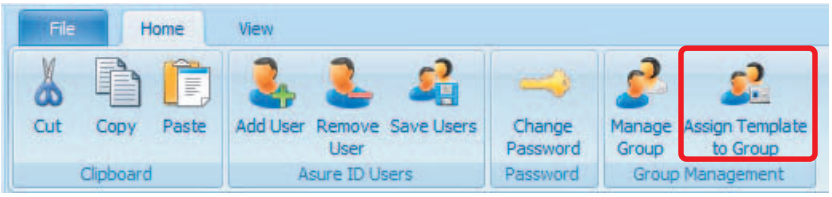
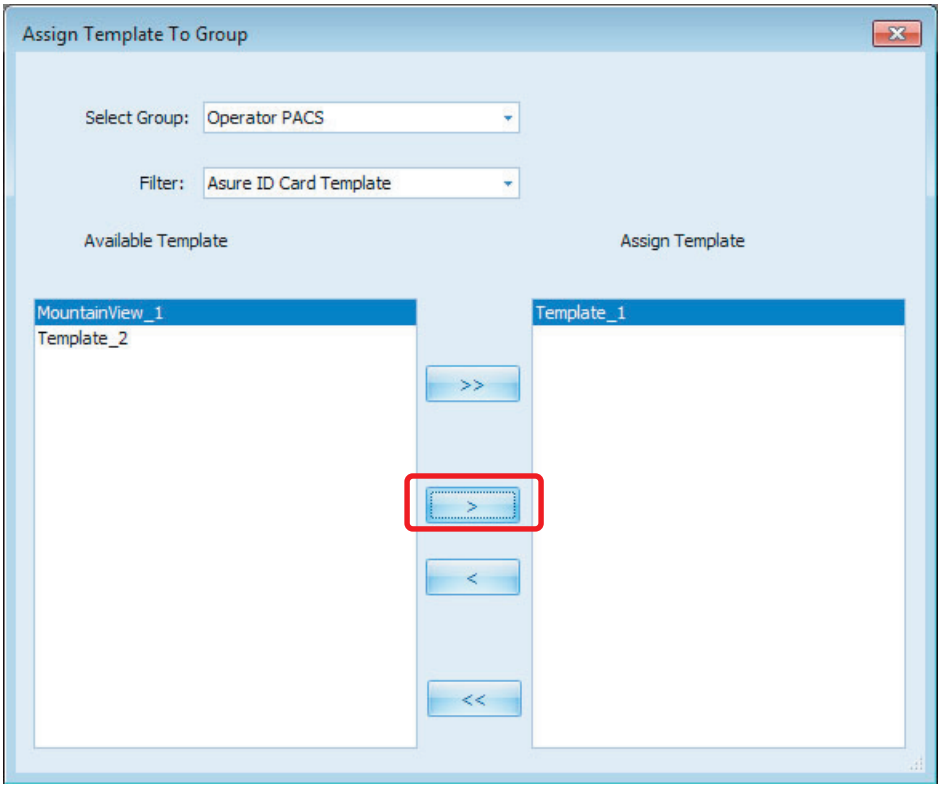
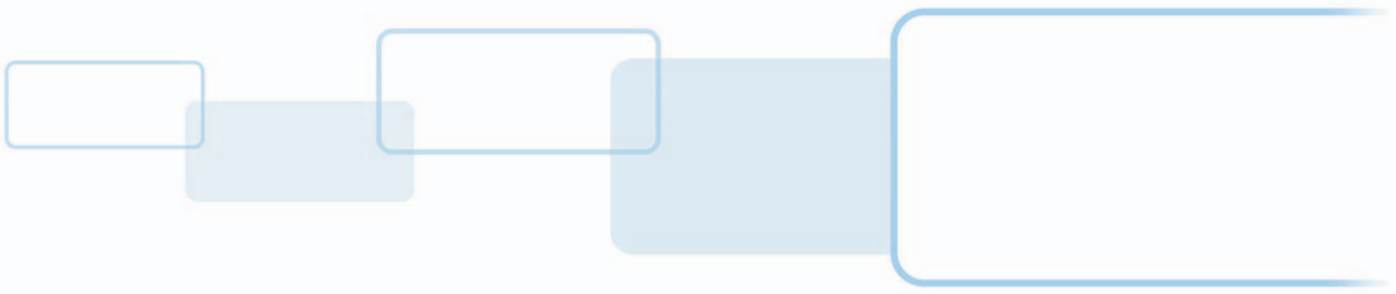


7.1.6 Delete a user group

1. Select the **Advanced** application > **User Config** module > **Home** tab > **Manage Group**.
2. In the **Manage Group** window, select the group to delete and select the **Delete Group** icon.
3. In the Warning pop-up dialog box, click **Yes** to delete the user group.





7.1.7 Assign a template to a group

1. Select the **Advanced** application > **User Config** module > **Home** tab > **Assign Template to Group**.
2. In the **Assign Template To Group** window, select the group to assign the template to. In this example, **Operator PACS**.
3. Select the template type to filter (card templates, work orders or all). In this example **Asure ID Card Template** is selected.
4. Click the arrow key to move the selected Available Template column to the Assign Template column.