CardExchange® Visitor Manual

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1 Welcome

Welcome to the CardExchange® Visitor Management Help File

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1.1 Overview

CardExchange® Visitor Management software allows your organization to take maximum control and minimize security risks.

Within a few steps we make it easy to register, authorize, manage, and track visitors.
Our intuitive interface has a Microsoft look and feel that enables users to navigate our software with ease.
Streamline your visitor process and lobby congestion with our pre-registration feature and provide your visitors a VIP experience.
Reduce visitor back-log, monitor various types of traffic by categorizing visitors, manage events, create watch lists to alert of unwanted guests, and more.
You have all the power you want without the complexity of managing visitors.
Increase efficiency with maximum control over editing, processing, and output of visitor data.
With our badge designer you have all the tools you need to create the perfect card for your needs in a simple and fun way!

Built to meet the industry demand for visitor management applications, CardExchange® Visitor Management software provides a scalable solution to grow and adapt to your needs.

Streamline your visitor's...one step at a time!

Feature Highlights

Enter Edition

- Unlimited Visitor Records
- Returning Visitor Lookup
- On-Demand Evacuation Report
- Pre-Register Visitors
- Print Visitor Badges
- View/Print Reports
- Pre-loaded Badge Templates

Standard Edition

- Pre-Register Groups and Events
- Multiple Images per Record
- Visitor Vehicle Registration
- Badge Expiration Date/Time
- Batch Check-in/Check-out
- ID Scan Record Lookup/Display
- Scan and Auto Populate Record
- Quick View Expired Visitor Lookup

Business Edition

- Event Management
- Kiosk Mode/Multiple Lobbies
- Visitor Watch Lists
- Categorize Event Types
- Multiple Visitor Types
- Visitor Email Notification w/Barcode
- Non-Disclosure/Company Agreements
- Biometric Record Lookup/Display

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- Customize Record Field Labels
- User Login Profiles
- Import CSV files
- Import/Export Database Record Data/Images
- Define User and/or Group Permissions
- Track and Issue Parking Passes
- SMTP Integration
- Advanced Visitor Reports

1.2 System Requirements

Specications

Single License Editions:
Windows 7, 8, 8.1, and Windows 10
(32 and 64 bit)

Network (SBS) License Edition:
Windows 2008 R2, and 2012 Server
(32 and 64 bit)

All Editions:
Microsoft .NET Framework 4.8
Dual Core Processor
1024 MB Internal Memory
200 MB Free Disk Space
Internet Connection required for license activation and use of online help files.

Device Options

Portable:
Microsoft Surface Pro Tablets
Lenovo Windows Tablets

Printers:
ID Card and Label Printers, Windows Printers (i.e. laser or deskjet)

Capture:
Cameras, Signature Pads

Scanners and Readers:
ID Scanners, Biometric Devices, Barcode Scanners, Contactless Readers

For specific device and model information, please visit our
website.

1.3 FAQ

This page contains a selection of our most common and frequently asked questions...

- How can I activate a CardExchange® Visitor license? 16
- What should I do if activation fails?
- How do I create or edit my badge layout? 230

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- How can I add a Photo to my badge layout? 390
- How can I capture an ID photo for a visitor? 167
- How can I capture a signature? 183
- Which Cameras are supported by CardExchange® Visitor?
- Which Signature Pads are supported by CardExchange® Visitor?
- How can I show a variable image on the card layout? 392
- How can I configure magnetic encoding? 337
- How can I protect CardExchange® Visitor with user names and passwords? 234
- How can I find answers to specific questions about CardExchange® Visitor (forum)?
- Using GDI+ printing technology when printing results are poor. 327
- How to use ID scanners with CardExchange® Visitor. 138
- What are the colored circles for next to the visitors name? 135
- How do I add a new visitor? 137
- How do I create a new event? 252
- How can I import or export data? 162
- How do I use filters to show me checked-in visitors? 149
- How do I manage expired badges? 417
- How do I generate an Evacuation report? 419
- How do I view and print visitor reports? 282

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2 Getting Started

To get started with CardExchange® Visitor, it is important to get familiarized with the interface.
CardExchange® Visitor has two main interfaces:

- The Main Interface offering the Visitors view, the Events view etc..
- The Configuration Interface, the Card designer.

Most of the time you will be working from the main interface, shown above is the Visitors view.

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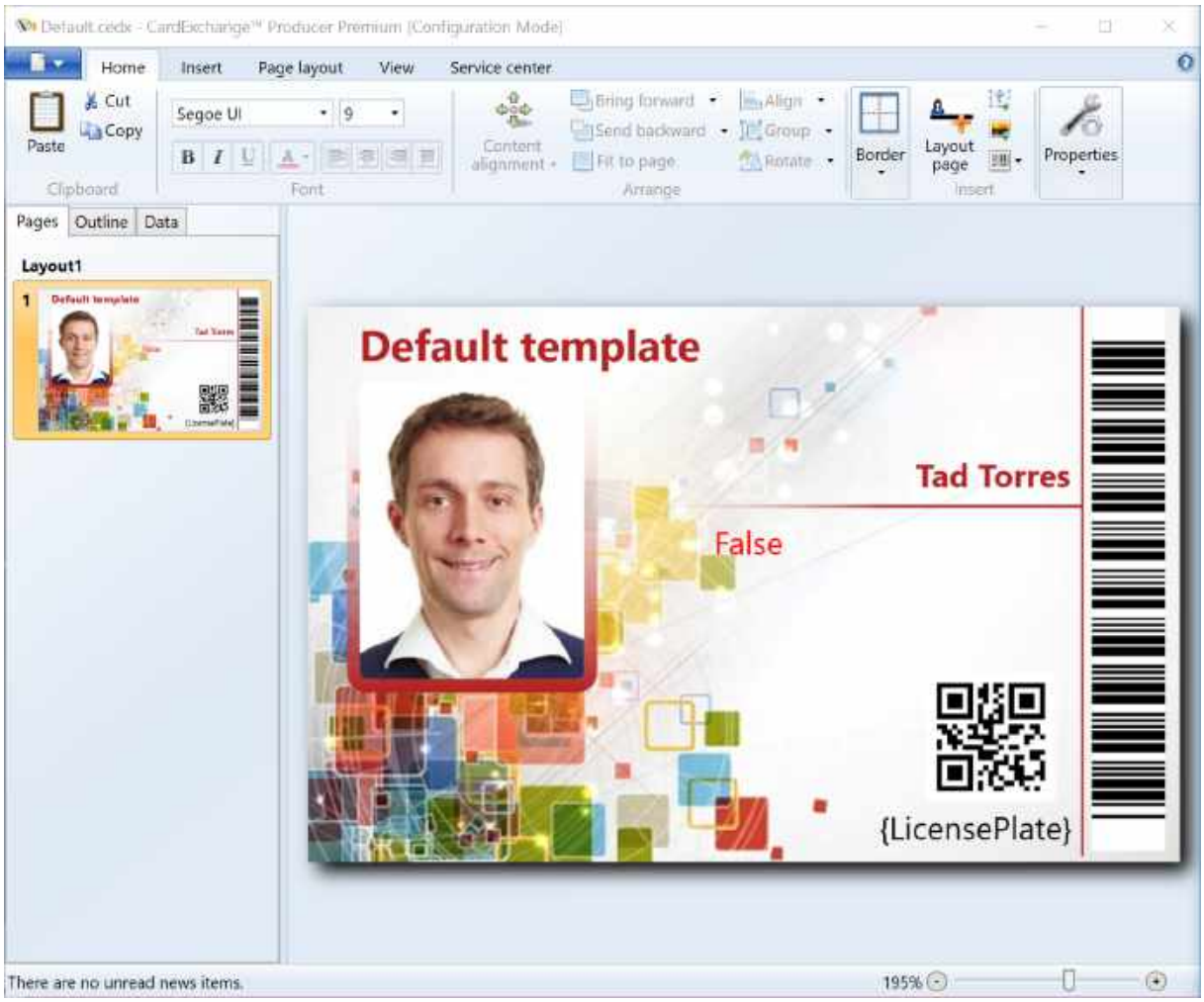

And we then have the Card Designer.

2.1 Our Trial Edition

Our CardExchange® Visitor Trial Version offers you unlimited access to all available functionality within our editions for a period of 30 dayds. When you have installed CardExchange® Visitor for the first time, just select "Evaluate CardExchange® Visitor" and select the edition that you want to try out.

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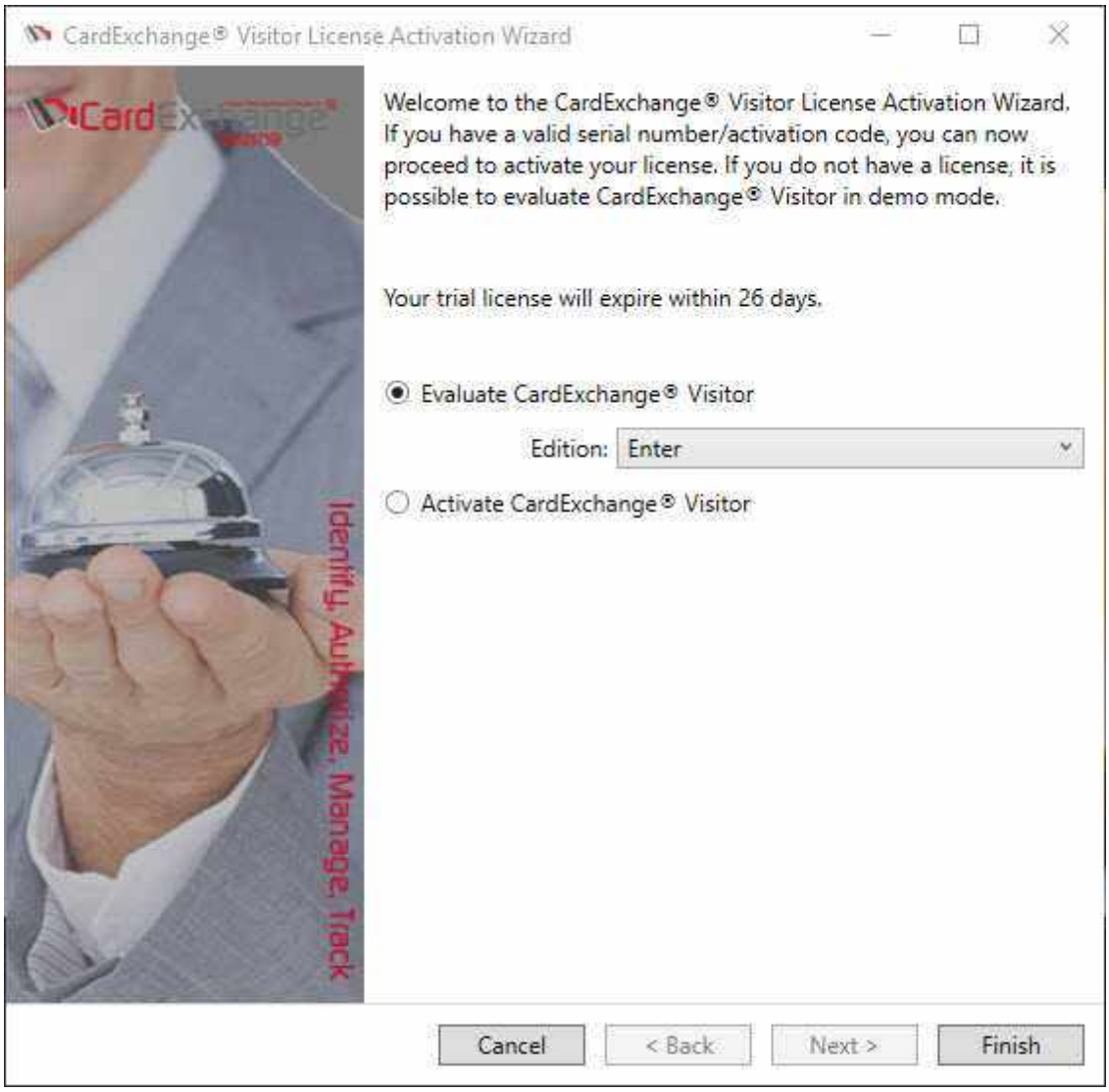

We offer the possibility to try out our Enter, Standard and Business editions. For information about the offered functionality per edition, check out our Overview 10 section in this Help File.

When you have made your selection from the drop down menu, simply click on Finish to start your trial and use all functionality offered. The only limitation of the Trial is that it prints DEMO on the card and on any reports. The nice part is, when you have configured, designed etc., and you like our CardExchange® Visitor application, you simply purchase a license, activate it, and you keep on working. Nothing needs to be redone!

Activating your Trial or your new installation is explained in our Activation and Registration 16 section of this Help file.

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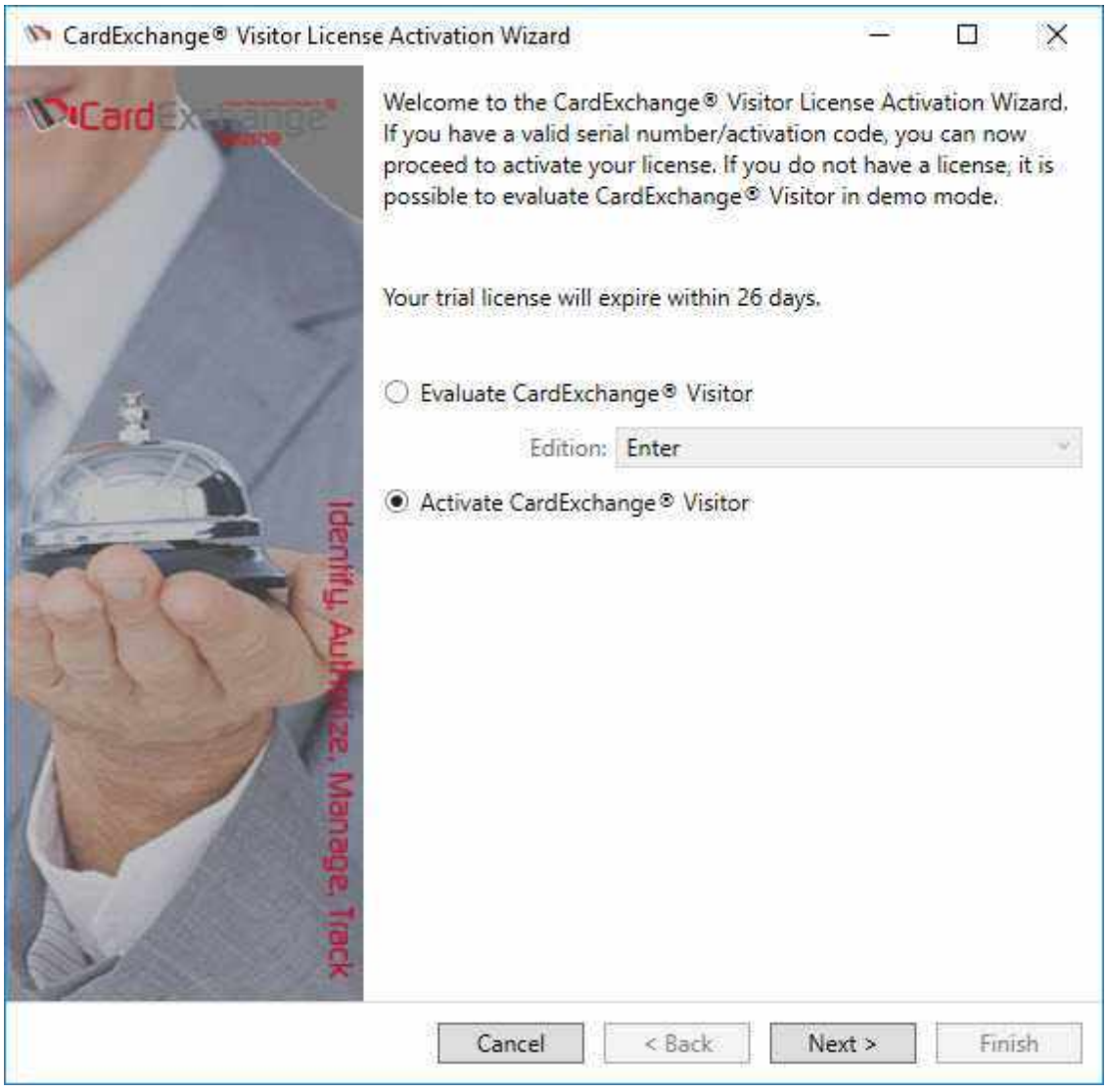
2.2 Activation and Registration

When you have used our Demo Edition and you want to use it, or you directly purchased our CardExchange® Visitor application via one of our resellers, you will have to activate the application.
To activate CardExchange® Visitor you need to have a **Serial Number** and **Activation Code**.

The serial number is a five (6) digit number and looks like 231441. The activation code is a 24 digit number and looks like 017DF-116DA-1ABA4-DDF80-CF05F-32D99-371F.

Activating your license is very easy to do. Just start your new installed CardExchange® Visitor application or start your Trial Edition.



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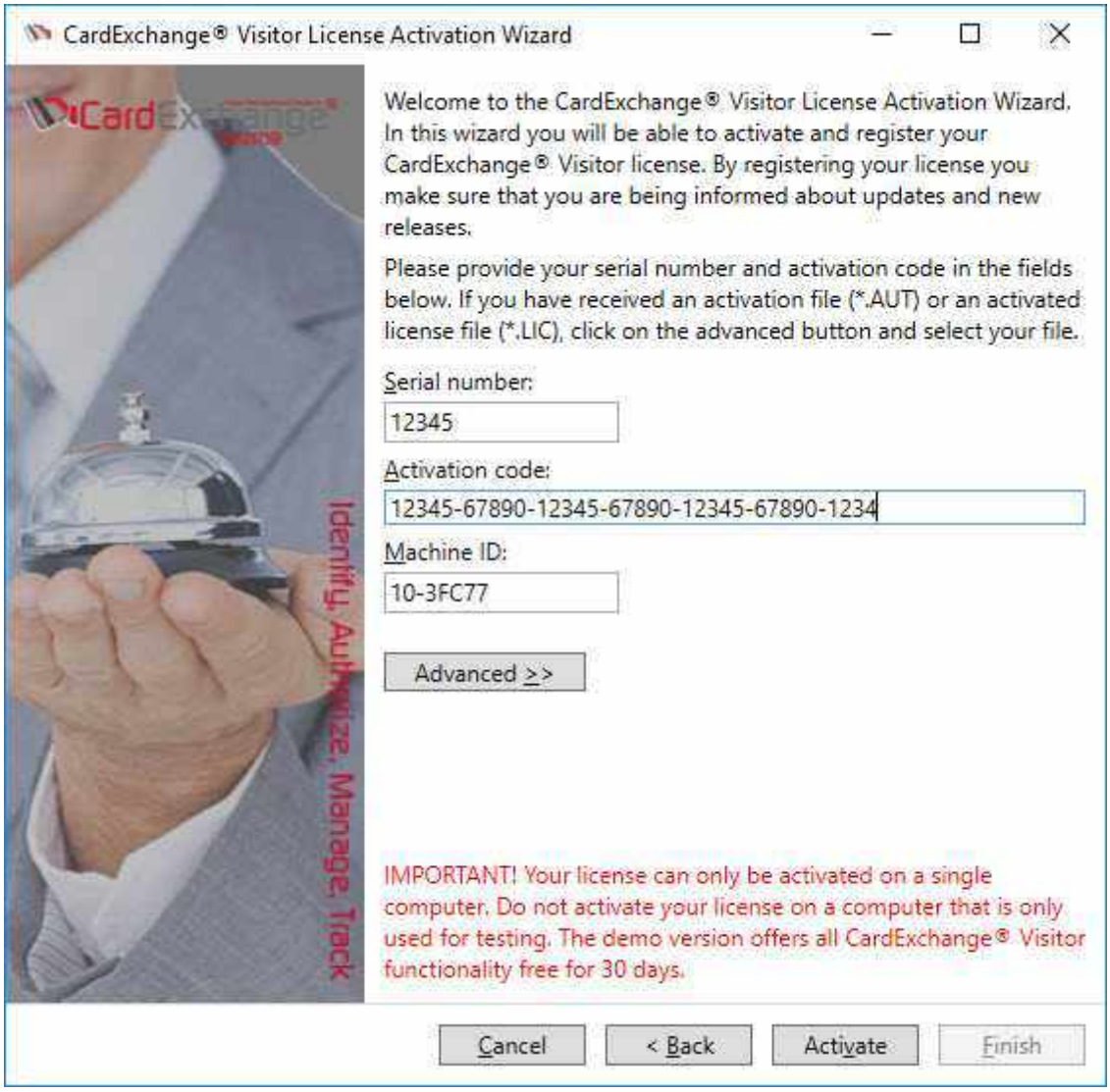
Select the "Activate CardExchange® Visitor" option and click on the Next button.



Enter your **serial number** and **activation code**.

The Machine ID is unique for each computer that CardExchange® Visitor is installed on and is used for activating the license and to identify your computer by our licensing system. The Machine ID is generated based on your internal computer hardware. If activation fails because you have, for example, no internet connection on your computer, your license can also be activated directly via our website but to activate your license via our website, you need to have this unique Machine ID. For more information about activating your license, please view our Video Section on our website where you can find helpful videos about installing and activating CardExchange® Visitor.

When you have entered your license information, you click on Activate to start the Activation process.

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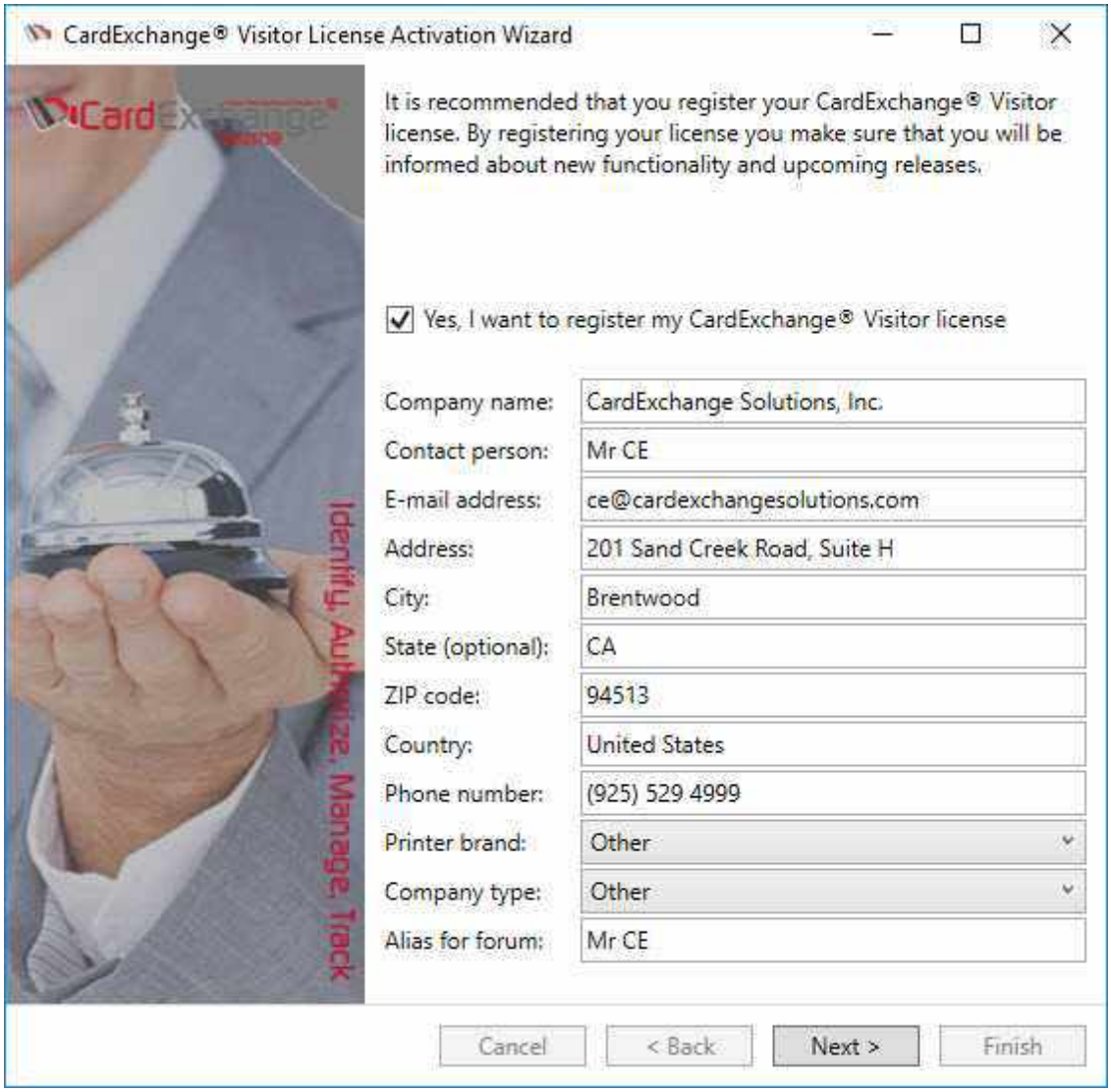
At the moment the activation process starts, you can start registering your license. Registering your license offers a lot of benefits. It offers access to our End-User Help Forum, it informs you about new releases and updates, etc.



In the registration page you can enter all your company and contact information. The fax number is optional, all other fields are required. Select the printer brand you are using, the type of company, and in which language you prefer to communicate. Last but not least, provide an Alias for our End-User Forum. Standard your alias is the same name as the name of the contact person, but you can change this to something else if you do not want to have your name shown in the forum with your post.

IMPORTANT! Your provided information will never be commercially sold and will only be used by CardExchange® Solutions and your reseller to provide you with important information about your software and hardware!

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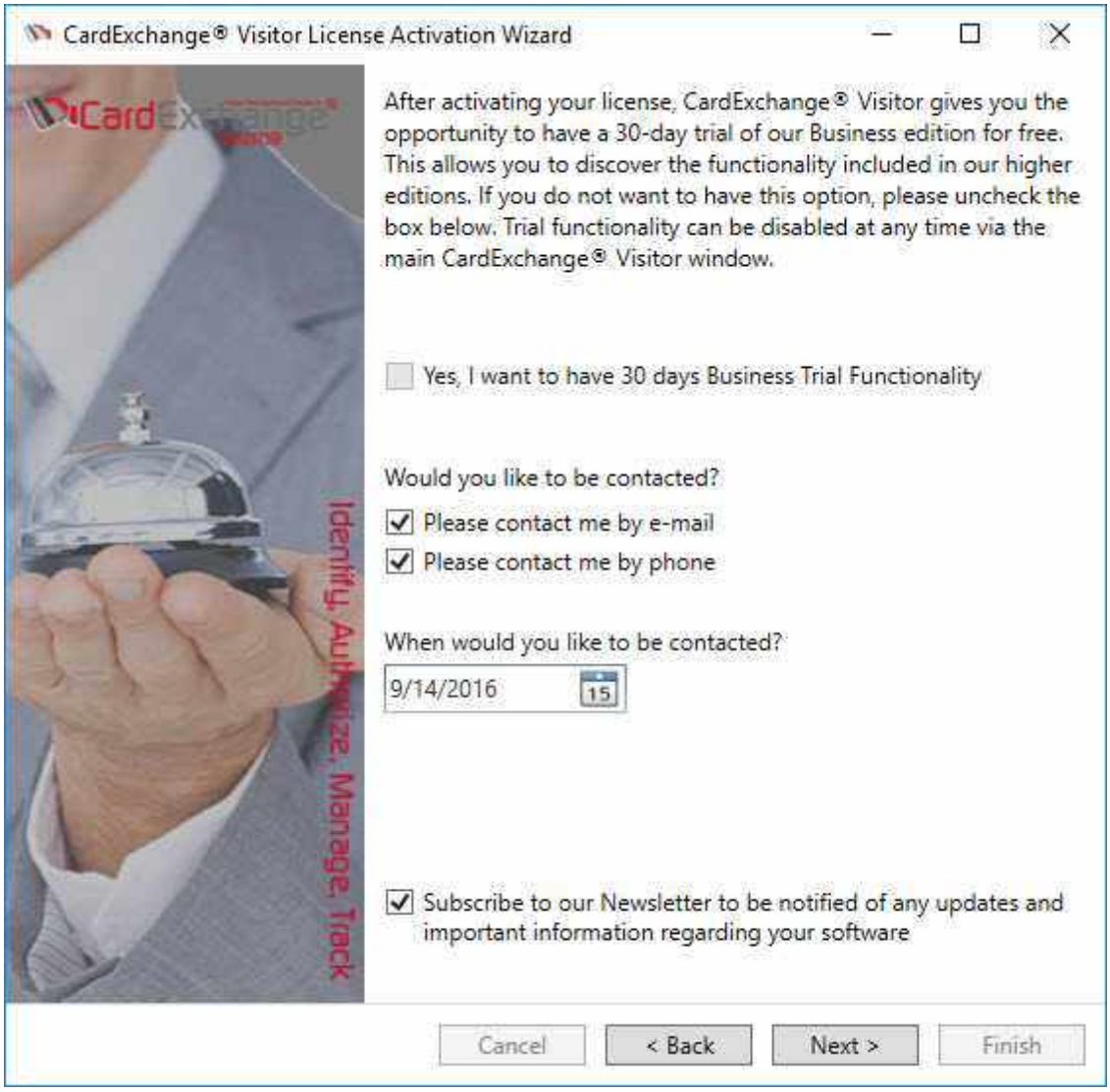
When you have provided all information, click Next to proceed to the next page of the registration.



In this page of the registration process you can first indicate if you want to use 30 days of all functionality available in CardExchange® Visitor, the Enterprise edition. This can be handy if you have, for example, received an Enter edition. Selecting this 30 days trial will offer you an insight to available functionality to determine which edition fits your situation best before buying. All trial functionality will be clearly indicated as TRIAL.

If you would like to be contacted, just select how and when, and your reseller will contact you on the preferred date selected.

Last but not least, subscribing to our newsletter offers you information specific for your software and hardware that you are using.

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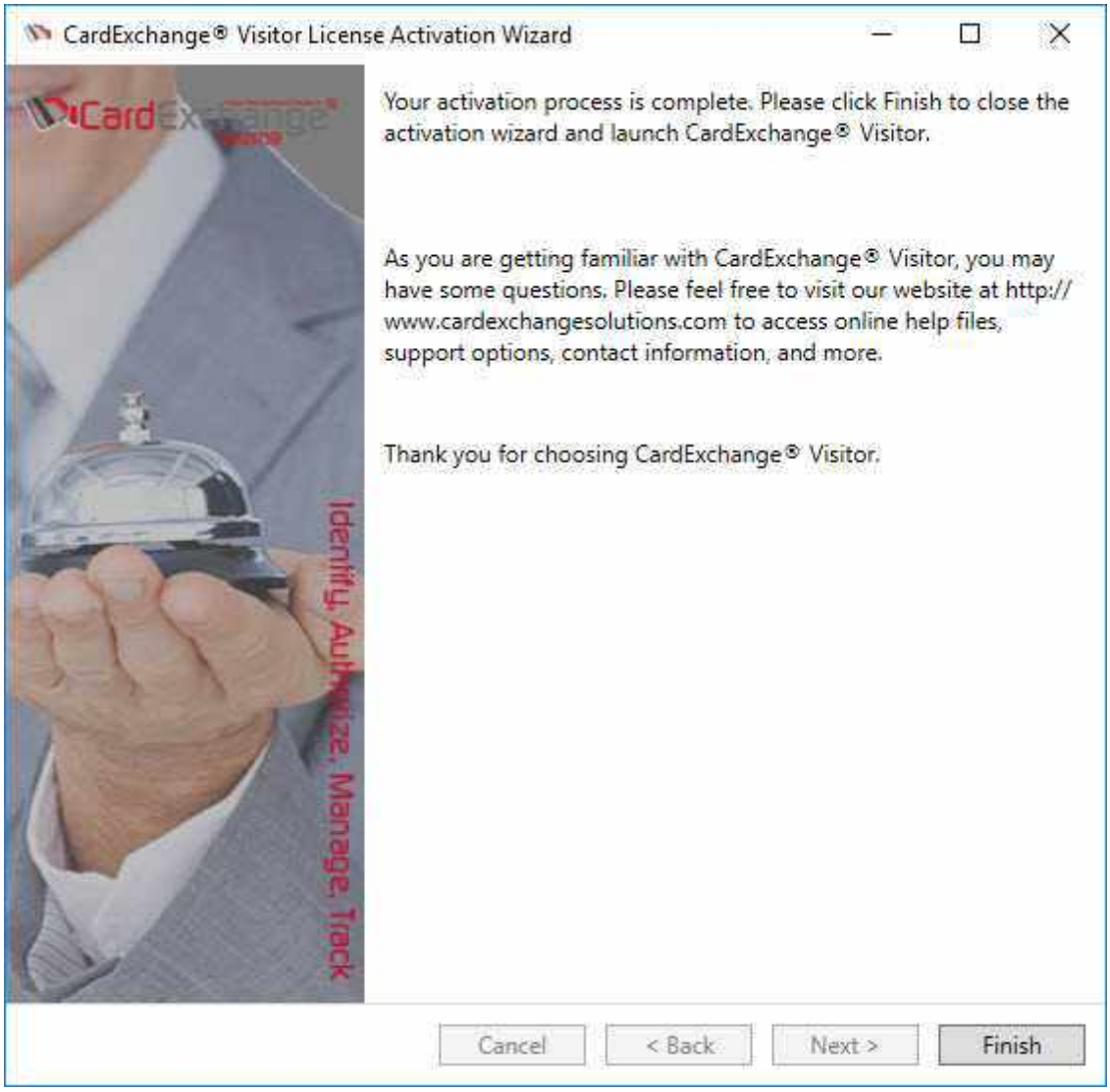
Click Next to proceed to the Final page of the registration process.



During the registration process, your CardExchange® Visitor license has been activated. Click on Finish to finalize the activation and registration and start CardExchange® Visitor.

For more information about updating your registration, please visit our "Update Your Registration Info" 298 section of this Help file. Want to upgrade your license to a higher edition, please visit our "Upgrade Your License" 293 section of this Help file.

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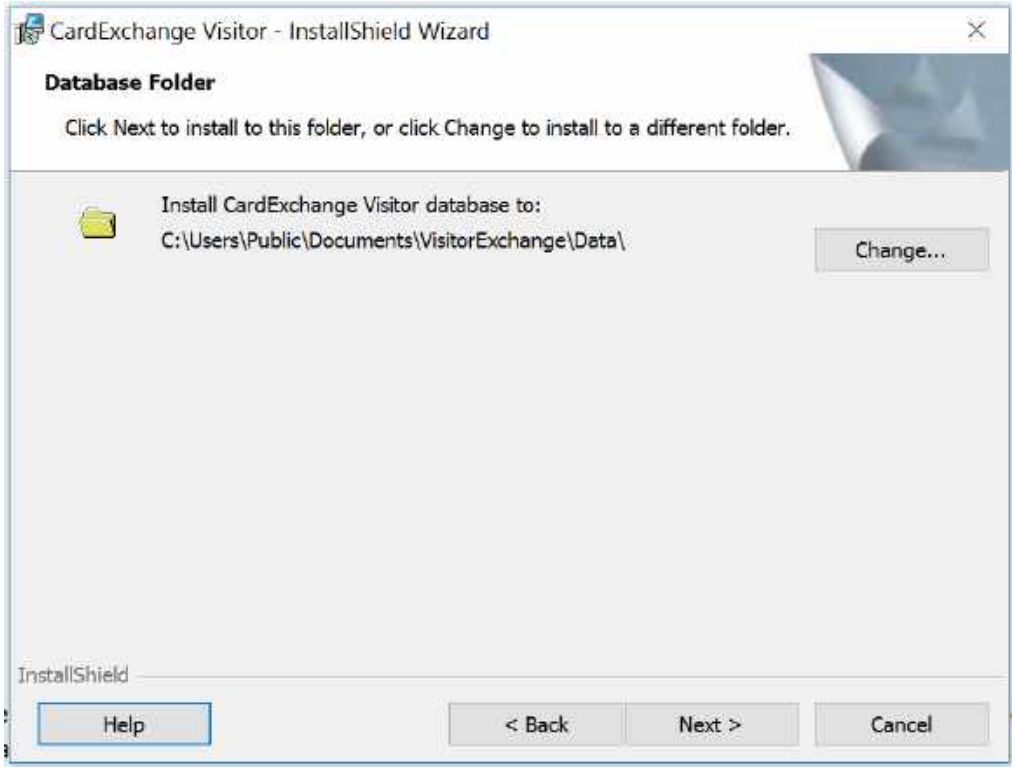
2.3 Data Folder



During the installation of CardExchange® Visitor you are asked to select a location for your Data folder. By default this folder is installed in the Public Documents folder under VisitorExchange.
The Data folder of CardExchange® Visitor contains the database of all your settings, visitors and events.

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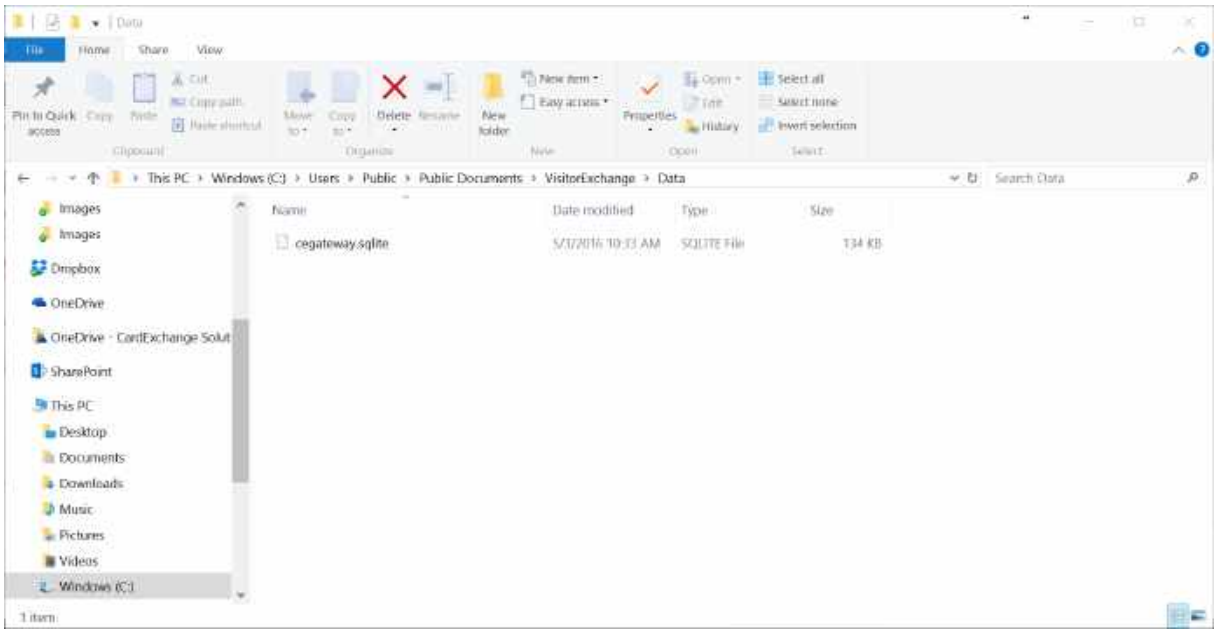
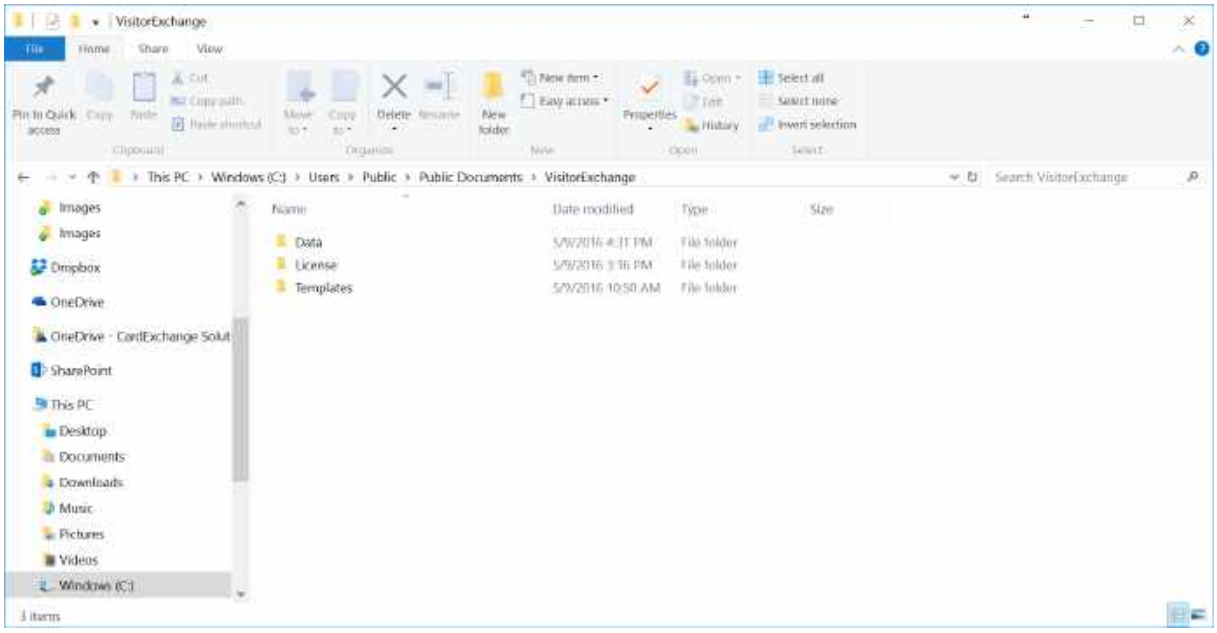


Alongside this Data folder is a Templates folder and a License folder. The Templates folder is where the default template is stored along with any additional templates you create. The License folder contains the license file that is unique for that individual PC.



We strongly advice to make regular backups from this VisitorExchange folder especially when you have made changes in your configuration.

When your computer crashes and you need to reinstall CardExchange® Visitor, after the installation and re-activation, you copy the backup of the VisitorExchange folder back, start

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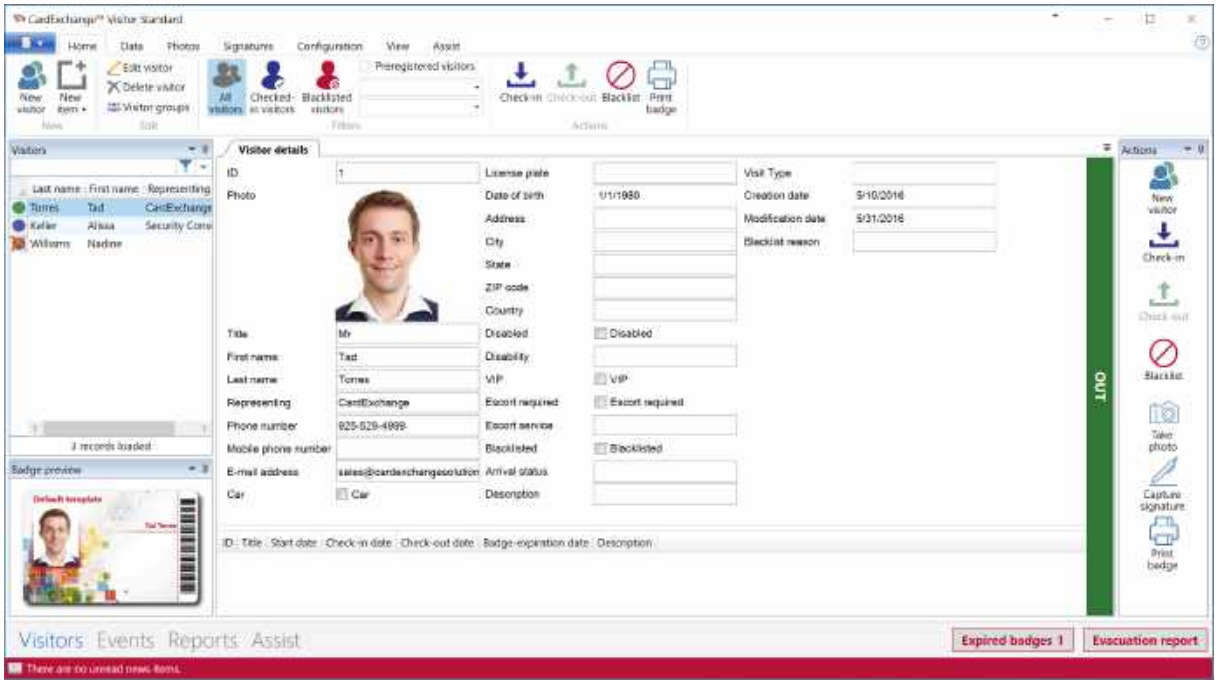
CardExchange® Visitor and all your configurations are restored and you can start working directly again.

2.4 Main Interface



The main interface of CardExchange® Visitor is split into different views available at the bottom of the window, the same as in Microsoft Outlook.
Selecting each view changes the view as well as the ribbon options.

Shown above is the Visitors view.

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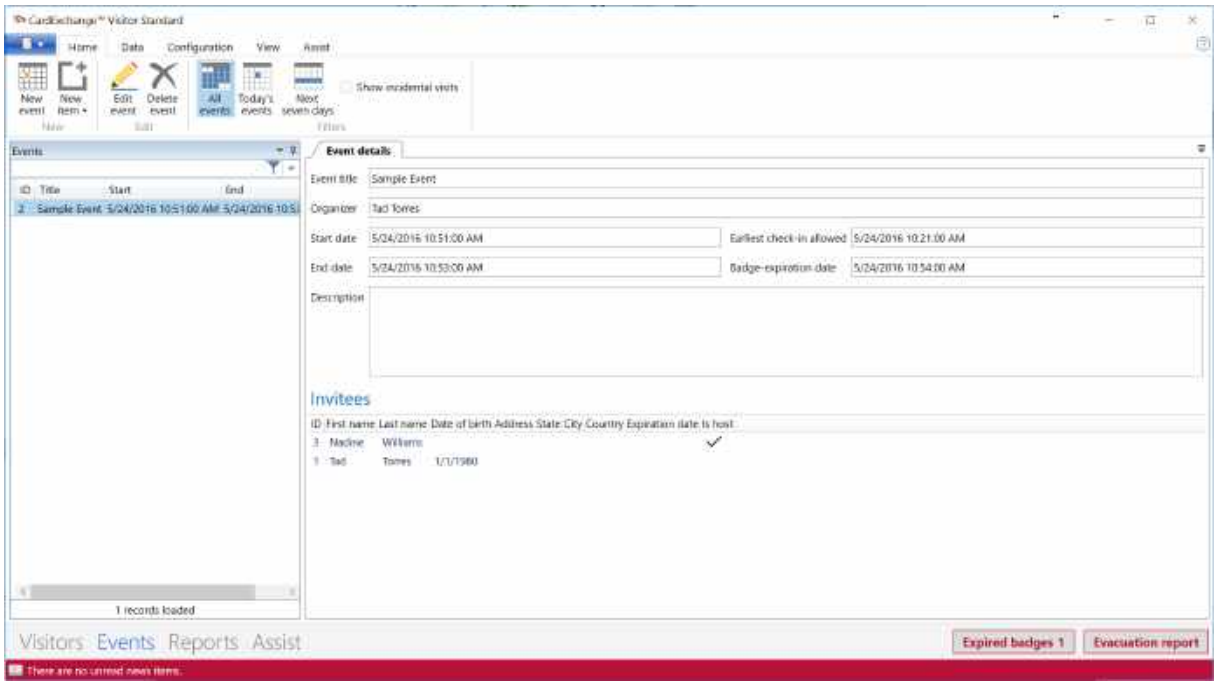
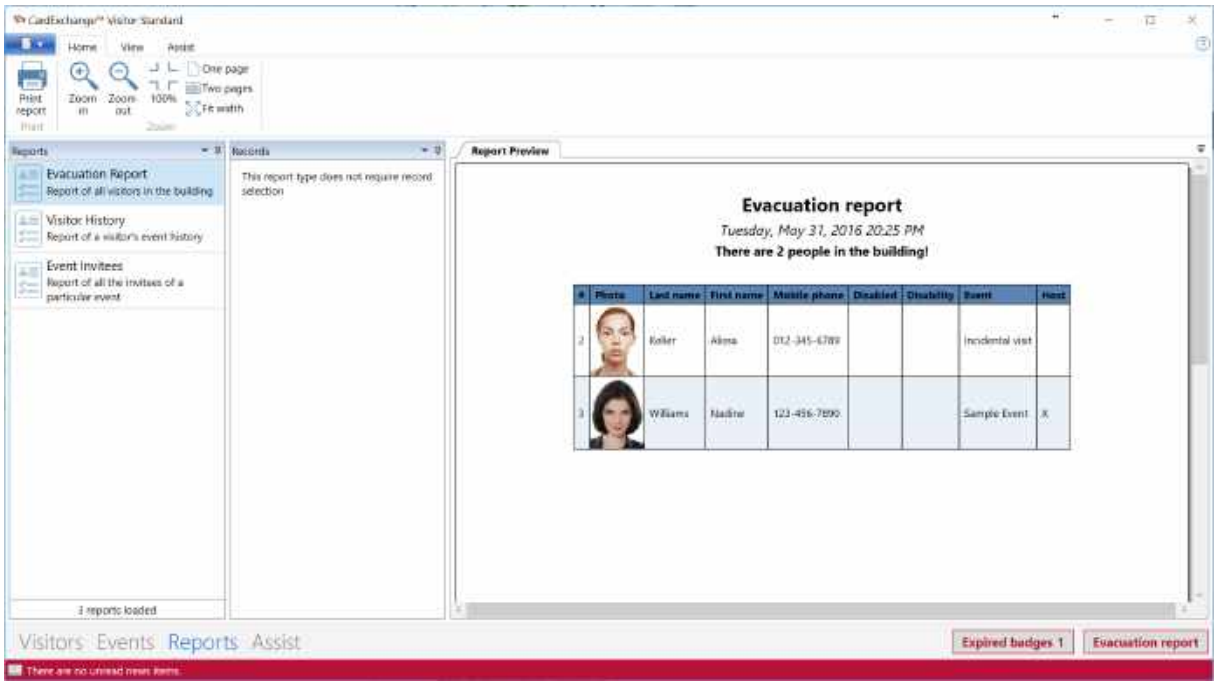


Above is the Events view.



Above is the Reports view.

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And the Assist view.

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3 Installation

There are two different procedures for

Single License Editions 27
Network Editions (SBS) 37

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3.1 Single License Editions

CardExchange® Visitor users a standard InstallShield Wizard, during the installation the installer will start checking the system requirements. The important thing that will be checked by the installer is that the .NET Framework 4.8 is installed. When not available, the installer will automatically start downloading this. If there is no internet connection available, it will automatically install it from DVD. If you are using the downloaded trial version and during the installation no internet connection is available, the installer will stop the installation process and you will be required to install the application manually.

The .NET Framework is normally available on the computer systems so we will not go deeper into this.

The CardExchange® Visitor installation wizard starts with the welcome page, now click Next to proceed:

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In this wizard page, the License Agreement is presented. You can click on the Print button to print out the complete text of the agreement. If you agree to the terms, please select the "I accept the terms in the license agreement" option and proceed with Next. If you do not agree, please select the " I do not accept the terms in the license agreement" and click on Finish. The installation will be canceled:

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In the Customer Information page you can provide specific information like the user name and the organization. More important is to determine who is allowed to use this application. Here you can select the option "Anyone who uses this computer (all users)" which is default and we advice to use for standard installations. Especially important when multiple users have access and accounts on the target computer. Select "Only for me (user name)" if you want to make sure only this user has access to the application. Click Next to proceed:

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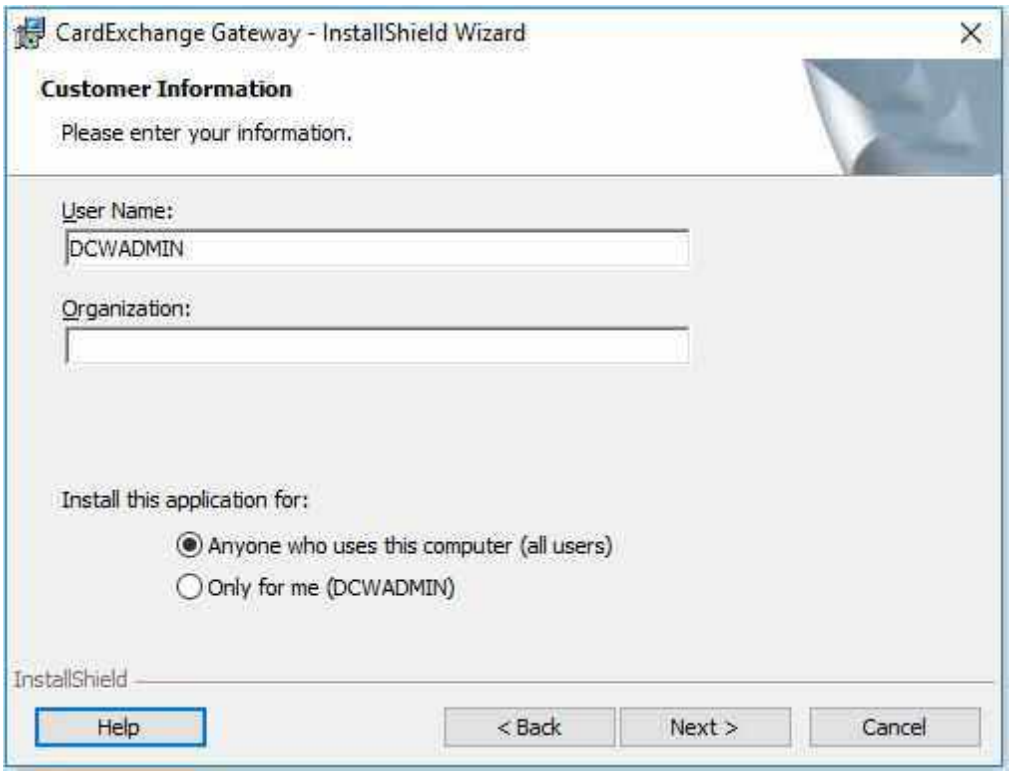

CardExchange® Visitor installations are compliant with Windows standards which means that by default the application is installed in the Program Files (x86) folder as shown in the screen shot below. The folder will be automatically created during the installation. Click on the Change button if you want to install CardExchange® Visitor to a different location. Click Next to proceed:

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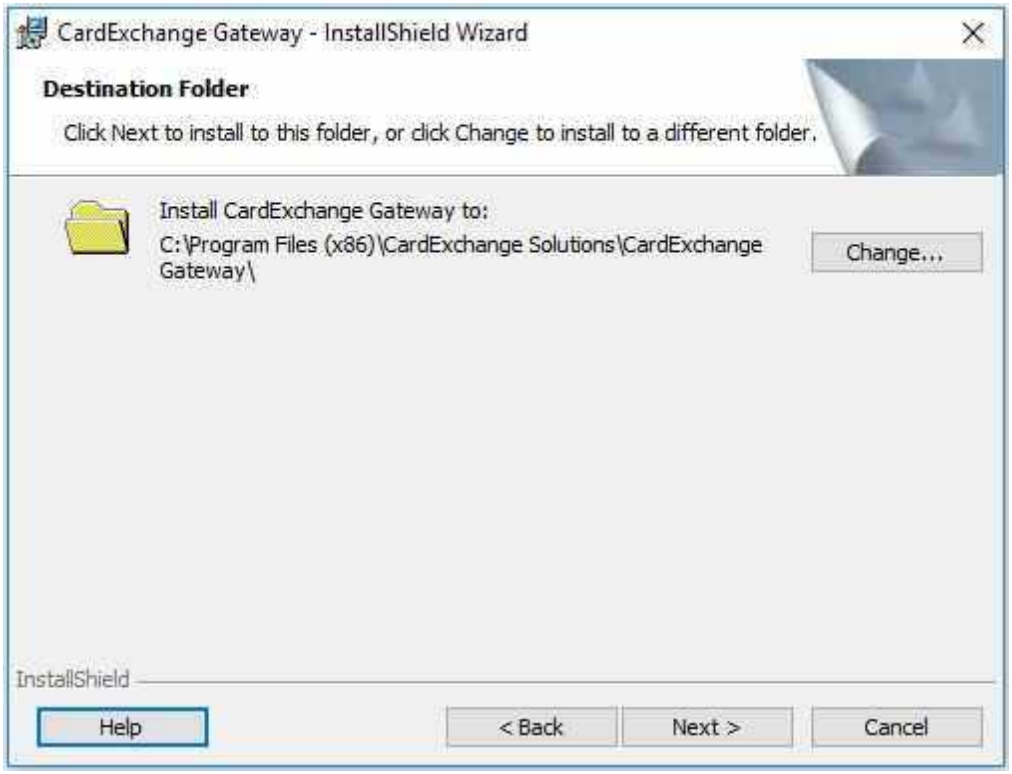

The Database folder of CardExchange® Visitor is one of the most powerful and flexible features of the CardExchange® Visitor application. It contains all your card templates, database, saved documents, etc. It is very important to install this database folder on a location that can be accessed by the user or by more users of the computer. The CardExchange® Visitor application reads and writes information from and to this folder and therefore the user needs to have read and write permissions to this location. By default it will be installed on Public section of your system, like as shown in the screenshot below. If you install this Data folder on a location that is not available for all users of the system, it will result in error messages and not being able to start up!

Make sure that you make regular backups of this Data folder. In case of a computer crash, this backup will save you a lot of work. You only have to install CardExchange® Visitor as normal and after the installation you replace the new Data folder with the backup and your system is up and running again! We advice to make a backup of the Data folder, every time you change something to your configuration. Click Next to proceed with the installation:

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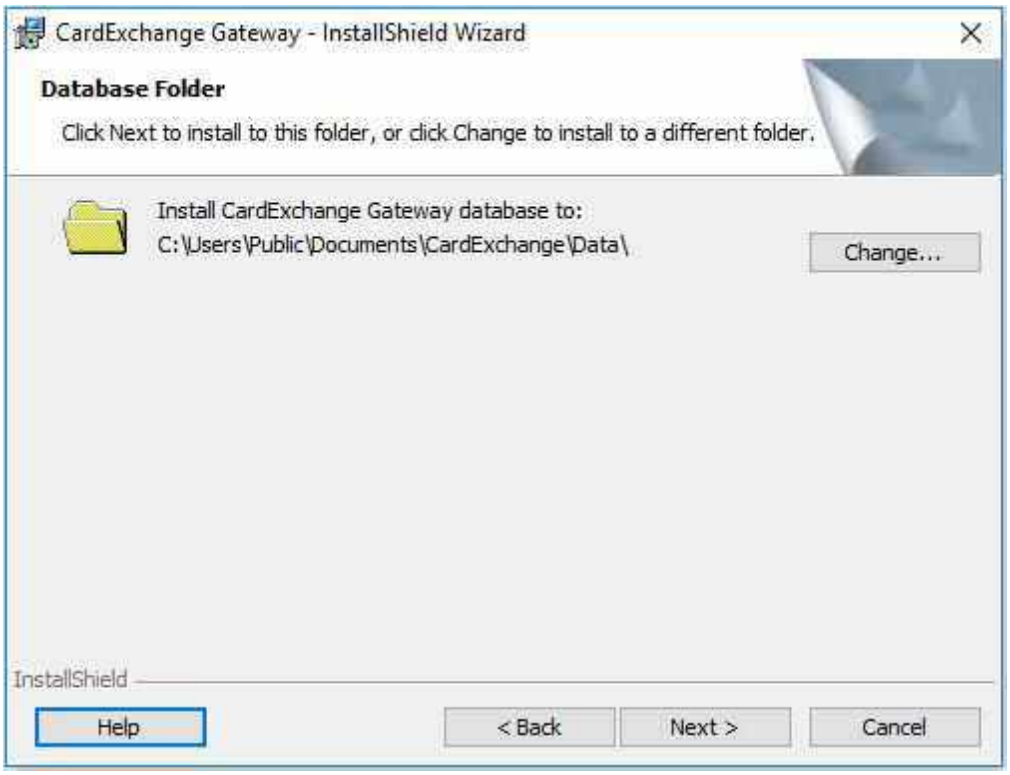
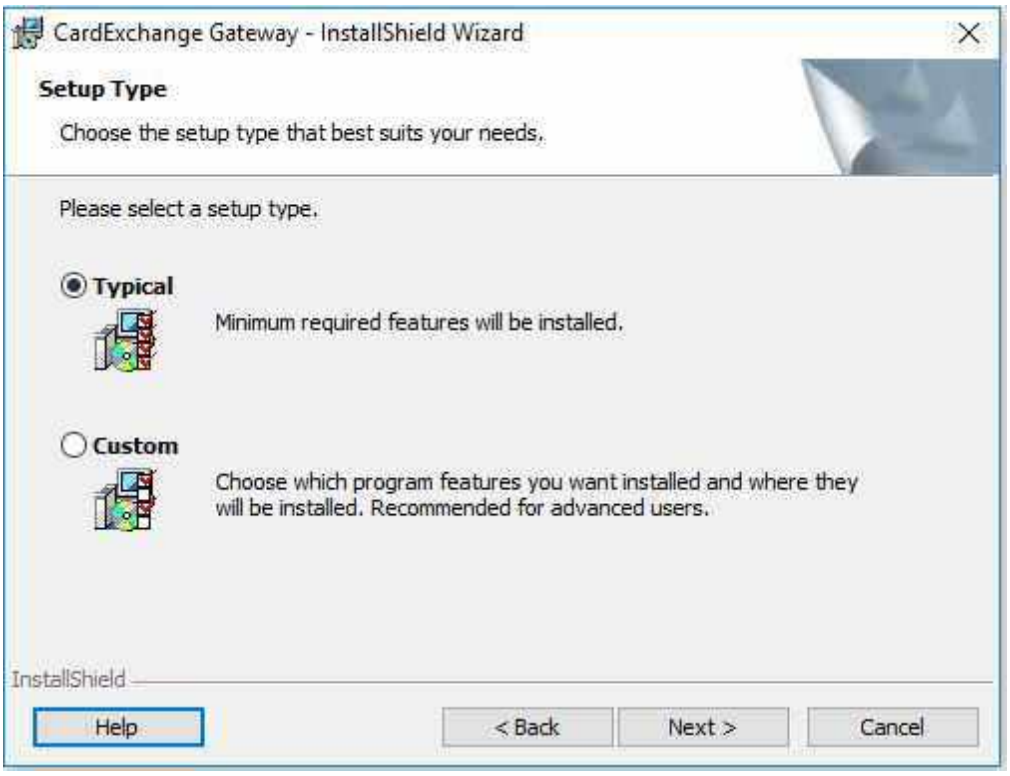


In the Setup type page you are asked to select the type of installation you want to proceed with. For standard installations, please select the Typical option.



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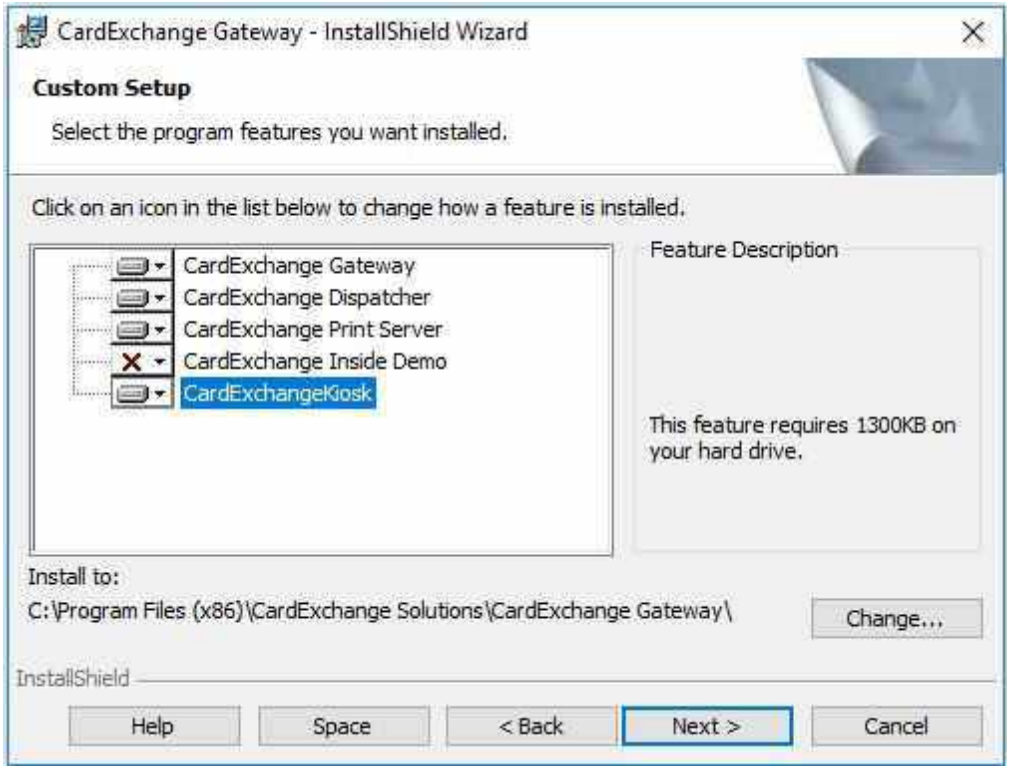
The Custom installation offers additional components that can be installed, these include the Kiosk.
You will require licenses for each of these additional components.



Now the installer has all the information to start installing CardExchange® Visitor on your system. Click Install to proceed:

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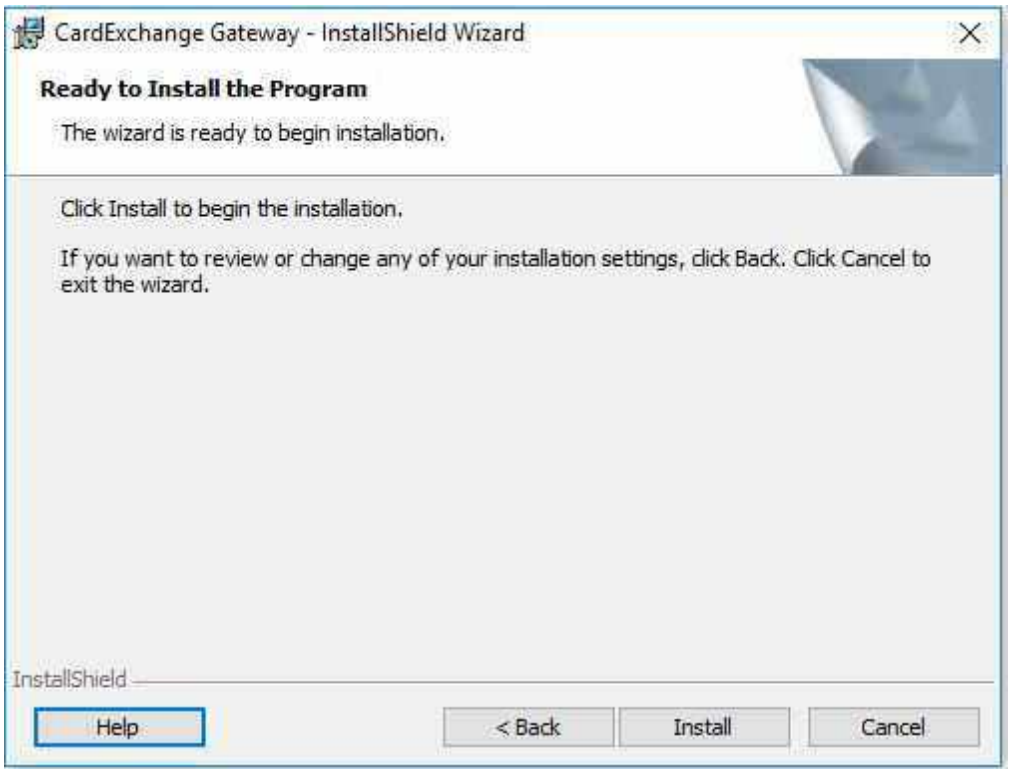

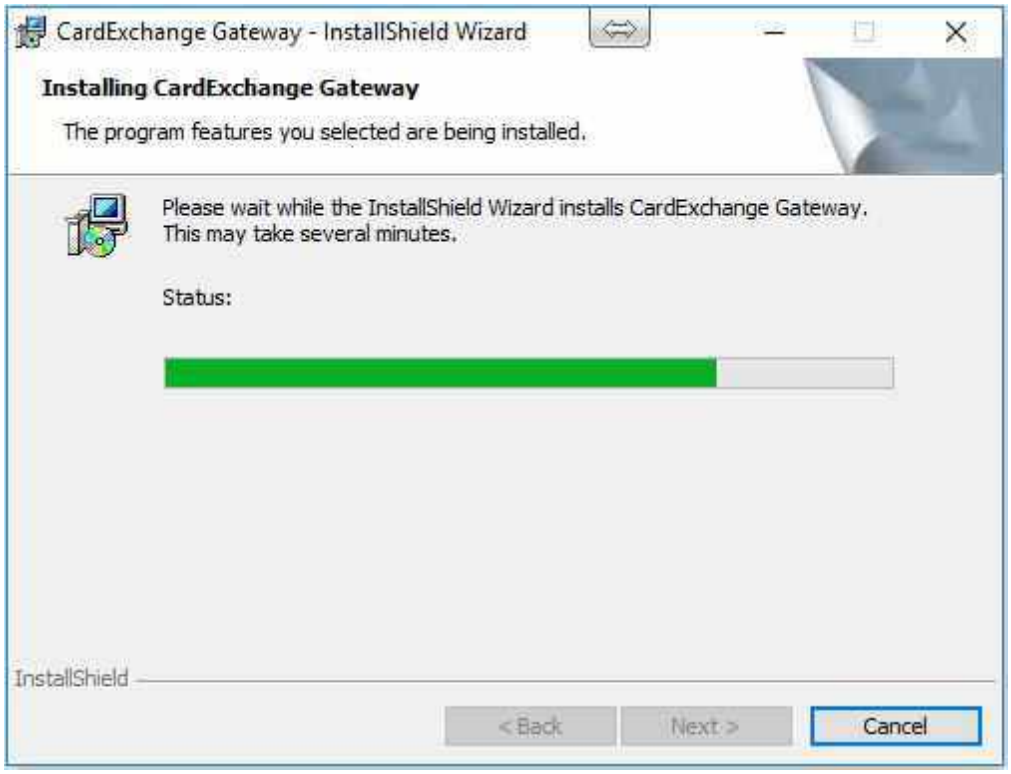

When the installation has succeeded, you can click on Finish to close the installer. Any temporary files will be removed from your system. You can run CardExchange® Visitor by

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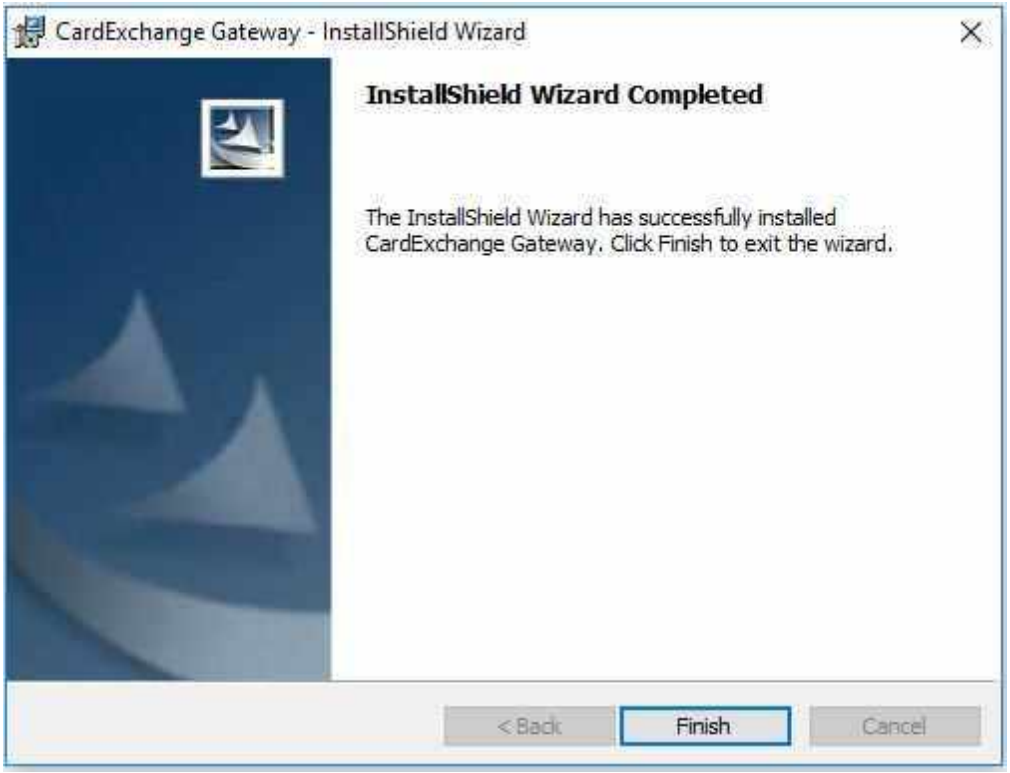
double clicking on the Desktop icon or select the application from the Windows Start menu.



3.1.1 Activation

Once you have installed CardExchange® Visitor, you will see the following screen when you run it for the first time:

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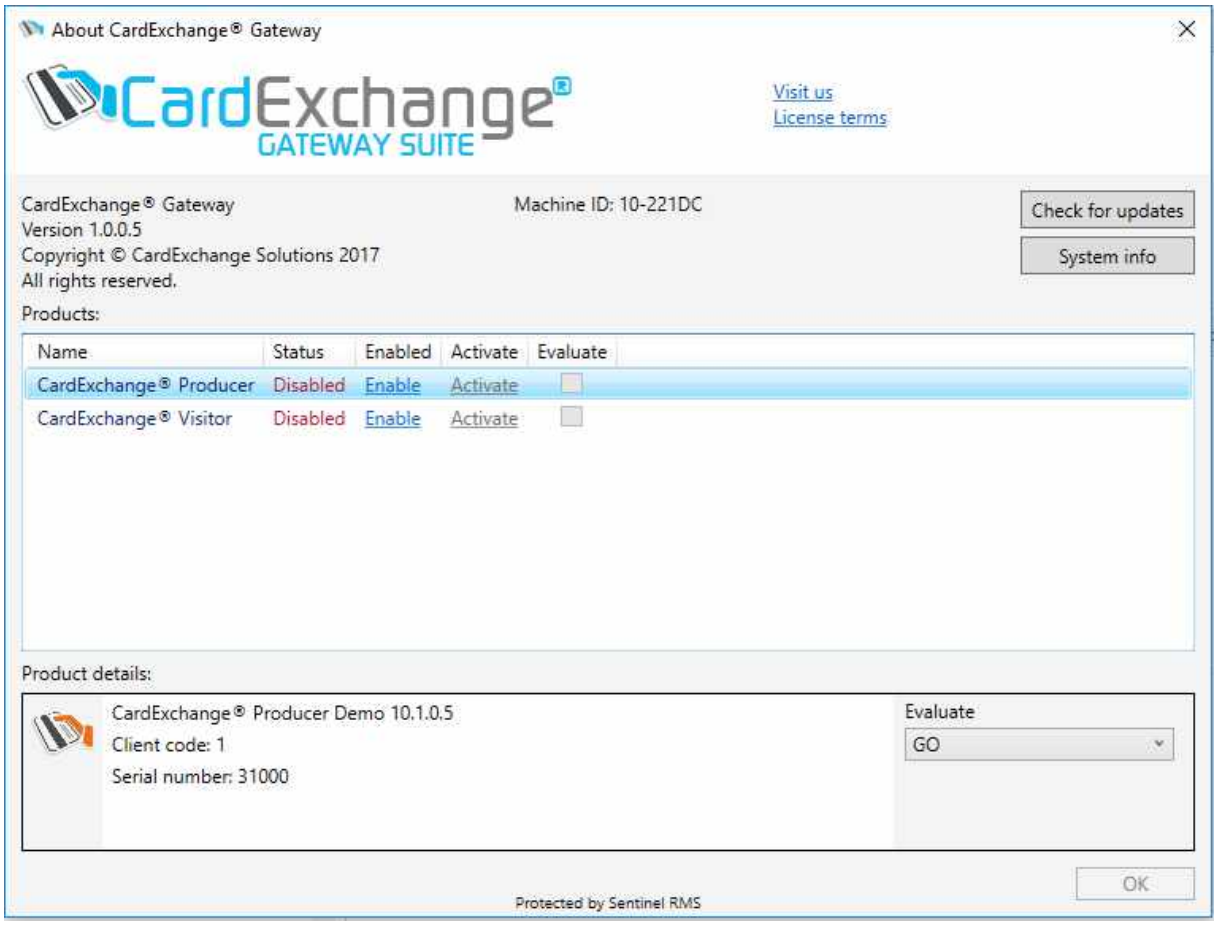

Here you can enable each product, choose to evaluate it in the different editions, and also directly activate each product.

CardExchange® Visitor has a 30 day trial period and will also print "Demo" on all printed badges.

For details on the activation process please see the below sections:

CardExchange® Visitor 16

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3.2 Network License Editions

Starting with the Business edition of CardExchange® Visitor, you can also choose to use the Network License Setup, this allows for concurrent licensing and the ability to run a CardExchange® client on a server operating system.

This would typically have the license manager installed on a server along with the database and configuration. The network client is then installed on the workstations that will be using the software.

For installing a CardExchange® Network License editions, the following operating systems are supported:

- Windows 7, Windows 8, Windows 10
- Windows Server 2008 R2, 2012
- Citrix and Terminal Systems
- Virtual Machines

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All operating systems are supported as 32 and 64 bit systems and need to run the latest available service packs of Microsoft.

For running CardExchange® Network editions on servers or workstations we advice the following minimum specifications:

- 400 MB free disk space for Workstations

- Dual core processor
- 2048 MB internal memory (32bit)
- 4096 MB internal memory (64bit)
- Microsoft .NET Framework 4.8

Specific Firewall information:

Firewall issues are usually solved by adding the Sentinel RMS License Manager to your the firewall exceptions. The provider of the licensing system SafeNet states that:

"The Sentinel RMS License Manager only uses the UDP port 5093 at Server end by default. And at client end the ports are used dynamically and controlled by Operating System i.e. for communication only UDP port 5093 is used at server end and at client end it is used dynamically on the basis of available port."

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3.2.1 Installing License Manager

First we have to install the license manager. CardExchange® products are using the license technology of SafeNet Sentinel by Gemalto. The License Manager is a product developed by SafeNet and not by CardExchange®. This license manager holds all the licenses that can be used by individual clients in your organization and prevents you of activating all clients separately. In this section we will explain how to install the license manager, activate your license, and configure the license manager. Follow the steps one by one to guarantee a successful installation and configuration. Each step will explain in detail what to do, install or configure:

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- Step 1 - License File Location 40
- Step 2 - Install License Manager 46
- Step 3 - License Manager Tools 52
- Step 4 - Activating SBS License 56
- Step 5 - Configuring License Manager 59

3.2.1.1 License File Location

The license manager stores it's license codes in a plain text file. This file can be located anywhere on the system but the Windows user that manages the license manager service process needs to have read and write access to this location. To make sure this is guaranteed, we need to create a specific Environment Variable to set the location.

To create this variable right mouse click on My Computer and select Properties. If you are running Windows 7, or 8, click on Properties and then select Advanced System Settings. If you are using Windows 10, please enter "System" in the search box and click on **System** as shown below:

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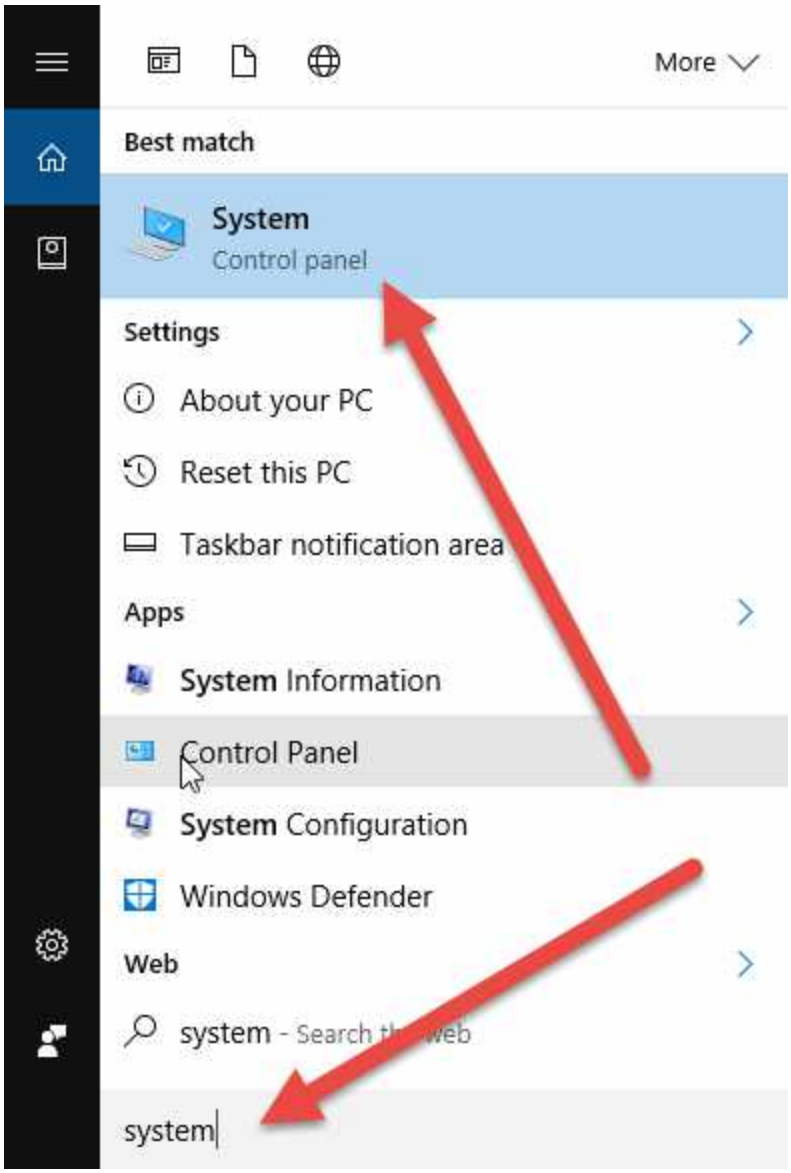

In the System window, click on **Advanced system settings**:

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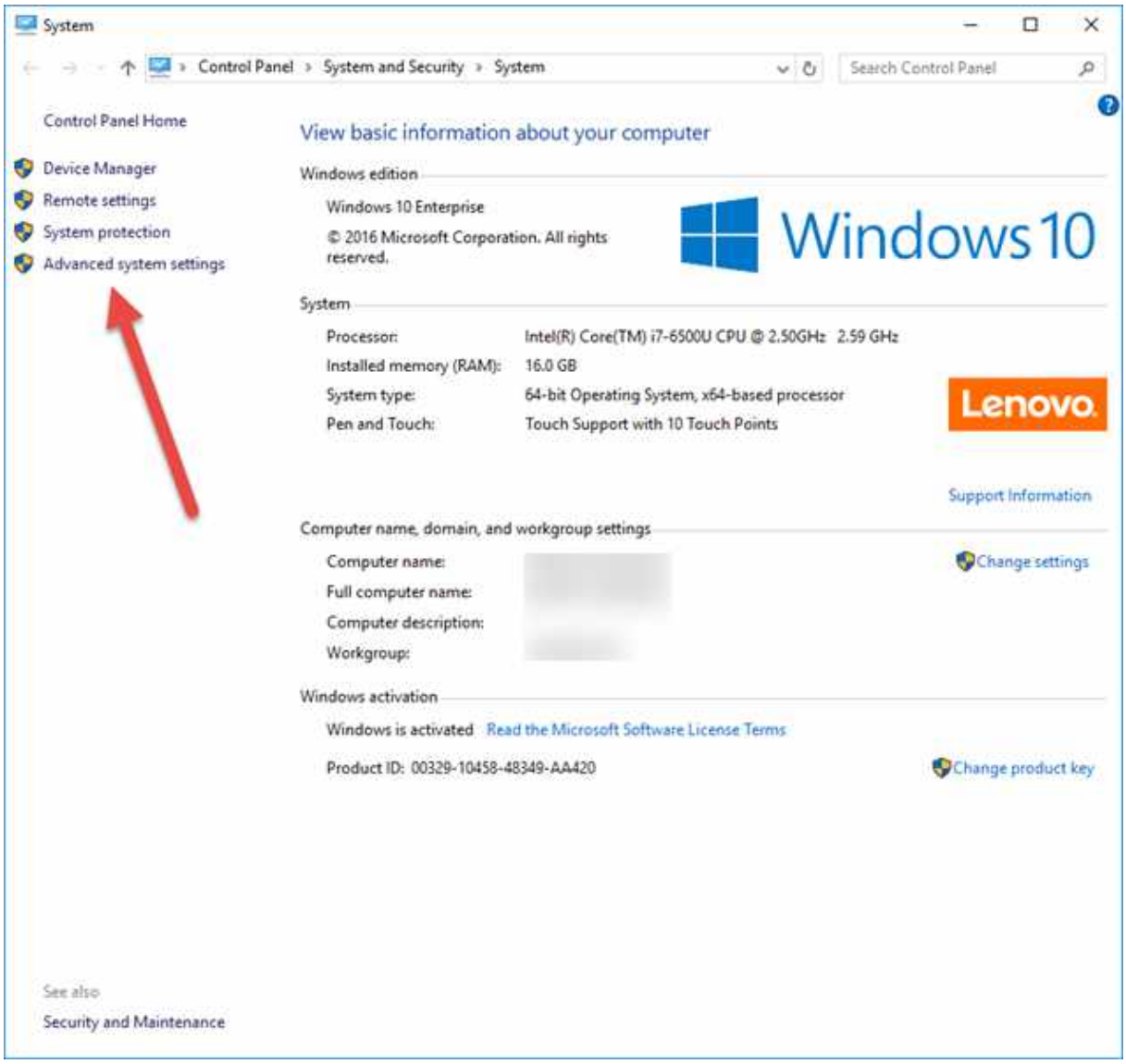

This will open System Properties window with the Advanced tab selected.

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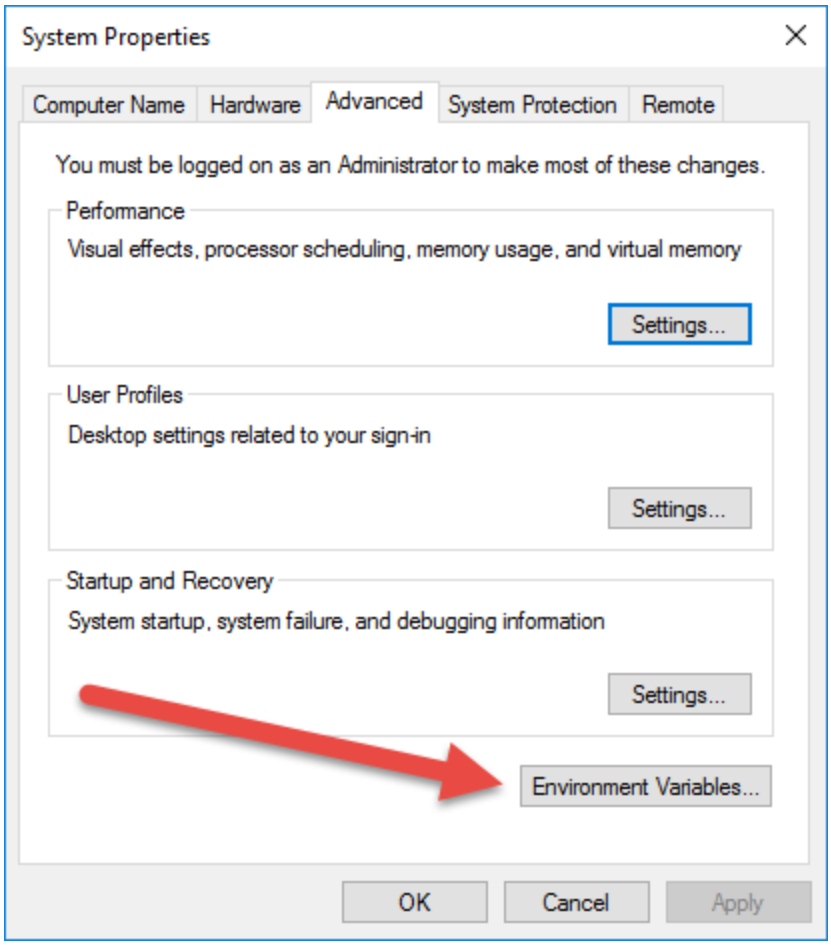

Now click on Environment Variables to open the this window:

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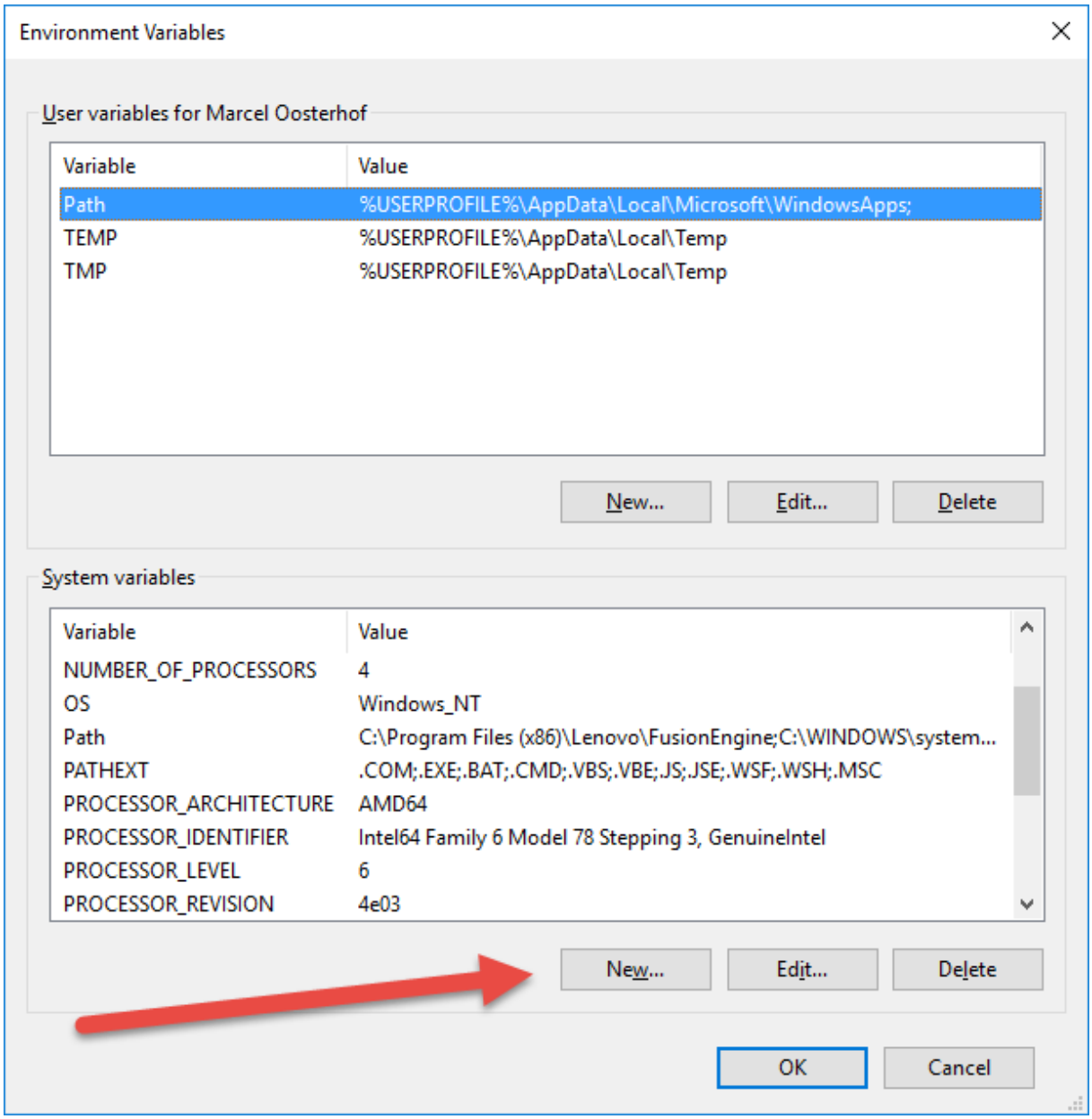
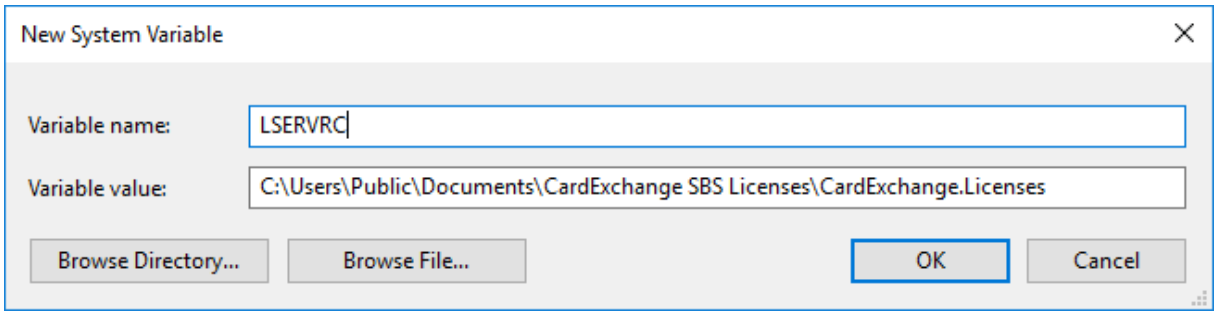


And click on New to create a new variable:



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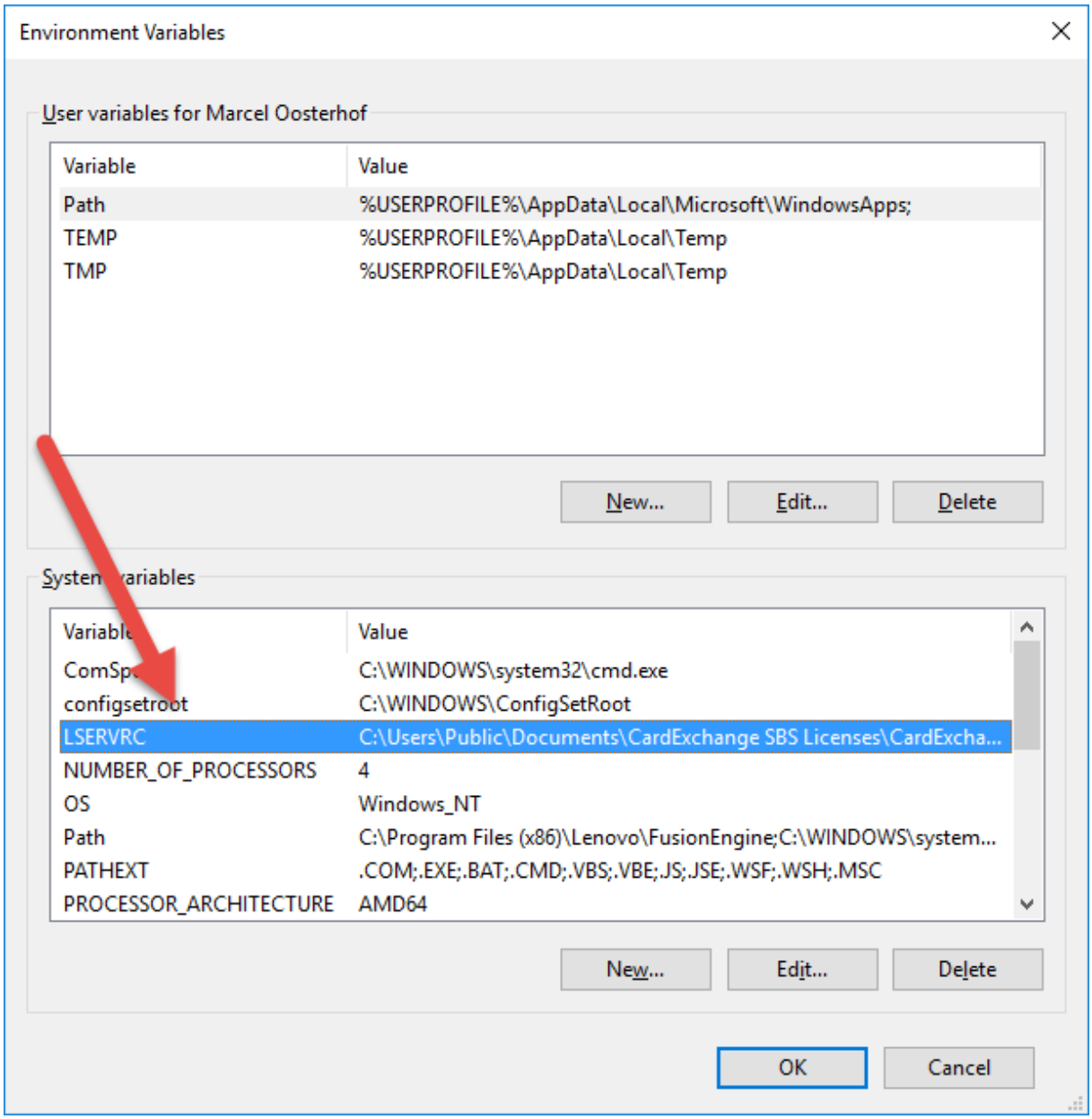
Enter **LSERVRC** as the variable name and enter the complete path of where the license file will be located into the value field.
Please note that the directory of the path should exist, while the file itself should not exist.

The name of the file is arbitrary, for example, **CardExchange.Licenses.**
Also make sure that the path is accessible and has all the rights otherwise it will result in access errors!

Click on **OK** to store the new created Environment Variable.



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3.2.1.2 Install License Manager

We need to install the license manager on the system, to do so click on the Install License Manager button to start the installation:

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When the installation is started, click Next to proceed:

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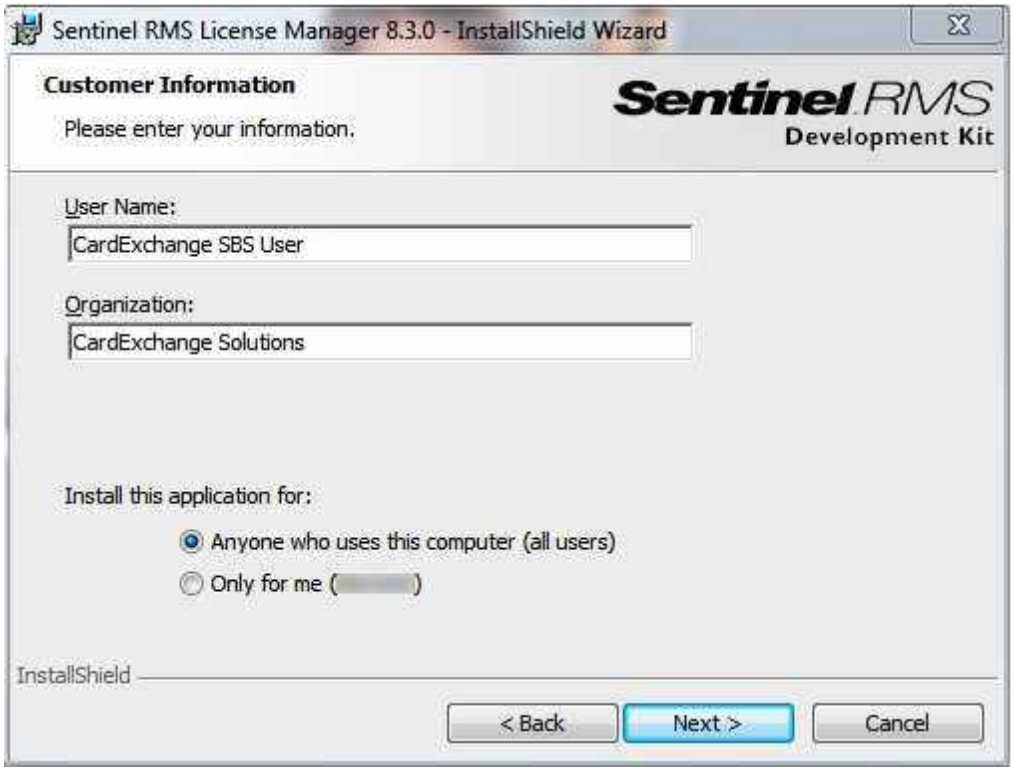
If you agree to the terms of this agreement, select accordingly and proceed by clicking Next:



Enter the user and company information. We advice to install this application so that anyone can use it:

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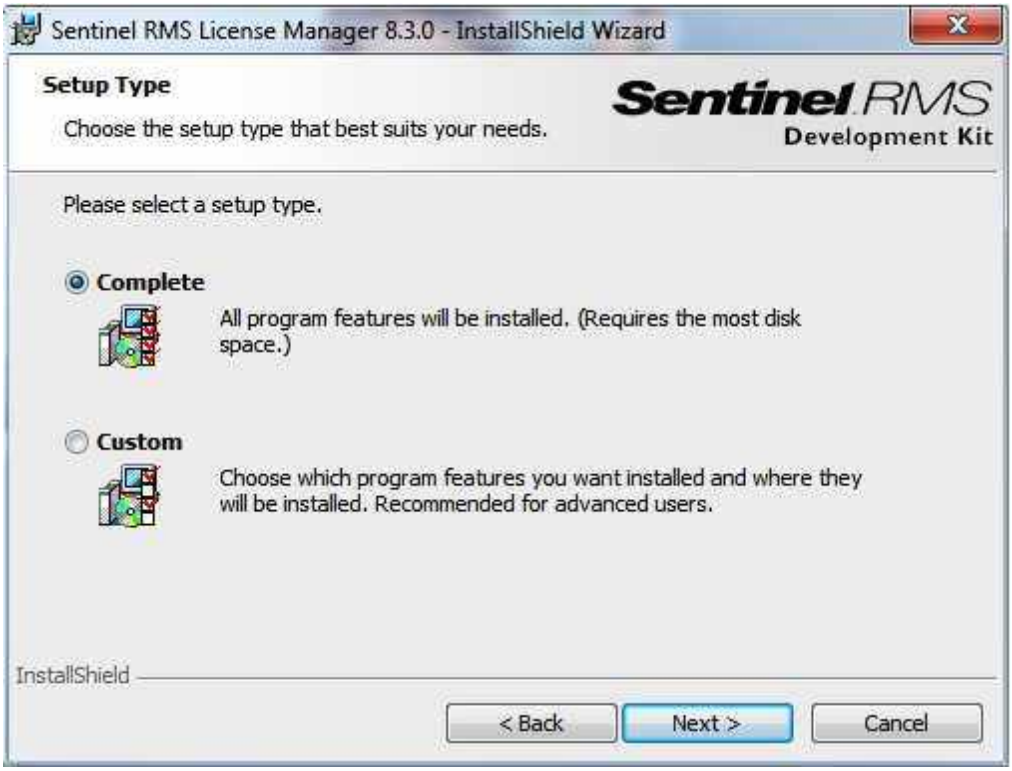
If applicable, change the destination folder of the application by clicking the Change button. However, we do advice to install it into the default installation folder:



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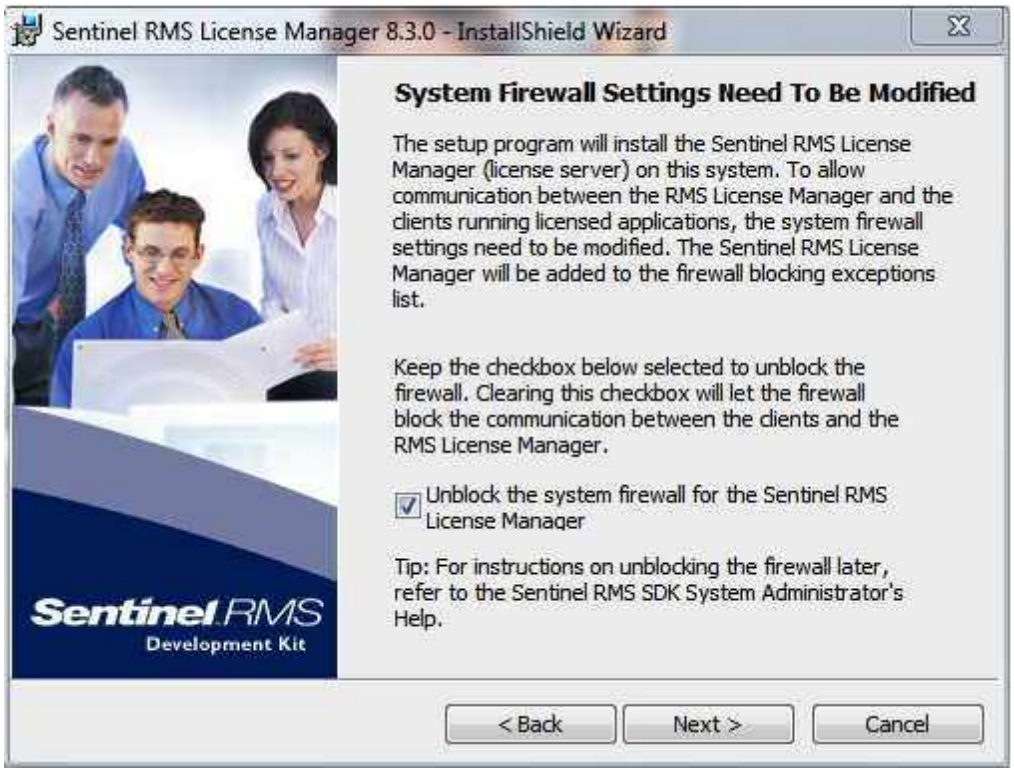
Choose Complete installation and proceed with Next:



License assignment by the license manager goes via UDP protocol over your network. It is important that all the clients can freely communicate with the license manager therefore the license manager needs to address some ports for it's communications. These ports are described and explained in the Requirements section of this manual. When installing, per default the installer can make the firewall modifications for your, as we advice to have the installer do so. If you want to do this manually, please uncheck the check box before proceeding:

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Now you are ready to install the license manager on your system and you can click Install to start the installation. Click on Finish when the installation is done to close the installer.

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3.2.1.3 License Manager Tools

The license manager we just installed is running as a service on your system and has no interface of it's own. As we need to be able to install the licenses and manager the license manager, we need to use additional tools to configure the license manager. These so called tools can be simply copied to a location on the server or workstation the license manager is running on.

To do so just simple click on the Browse CD button and make a copy of the tools folder on the CD.

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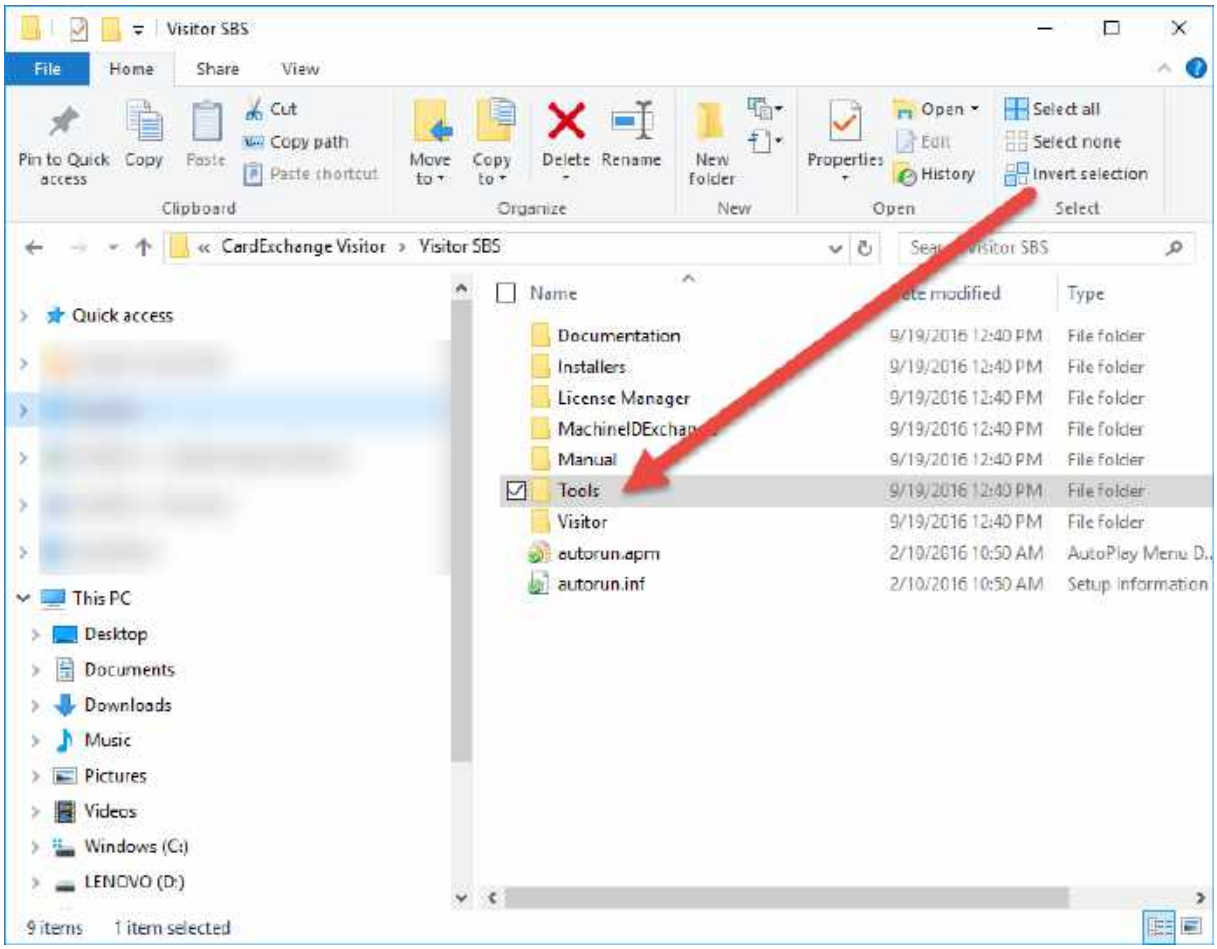

And copy this folder to a location on your server or workstation, for example to the folder **C:\Program Files (x86)\Common Files\SafeNet Sentinel\Tools**

Now browse the Tools folder and create a shortcut for the WlmAdmin.exe application as shown below, to any location that is convenient for you.

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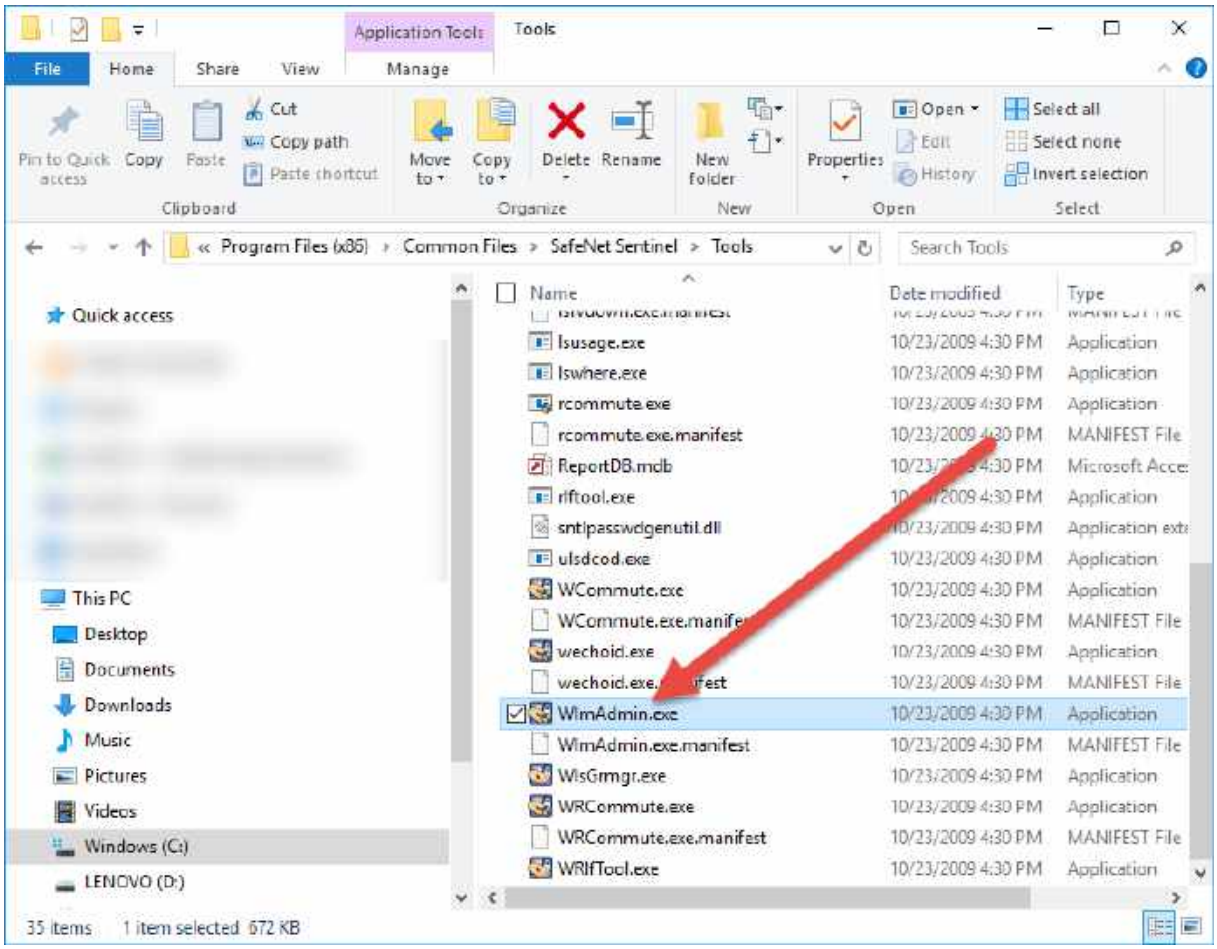

When you execute the **WlmAdmin.exe** application, an interface for the license manager will start.

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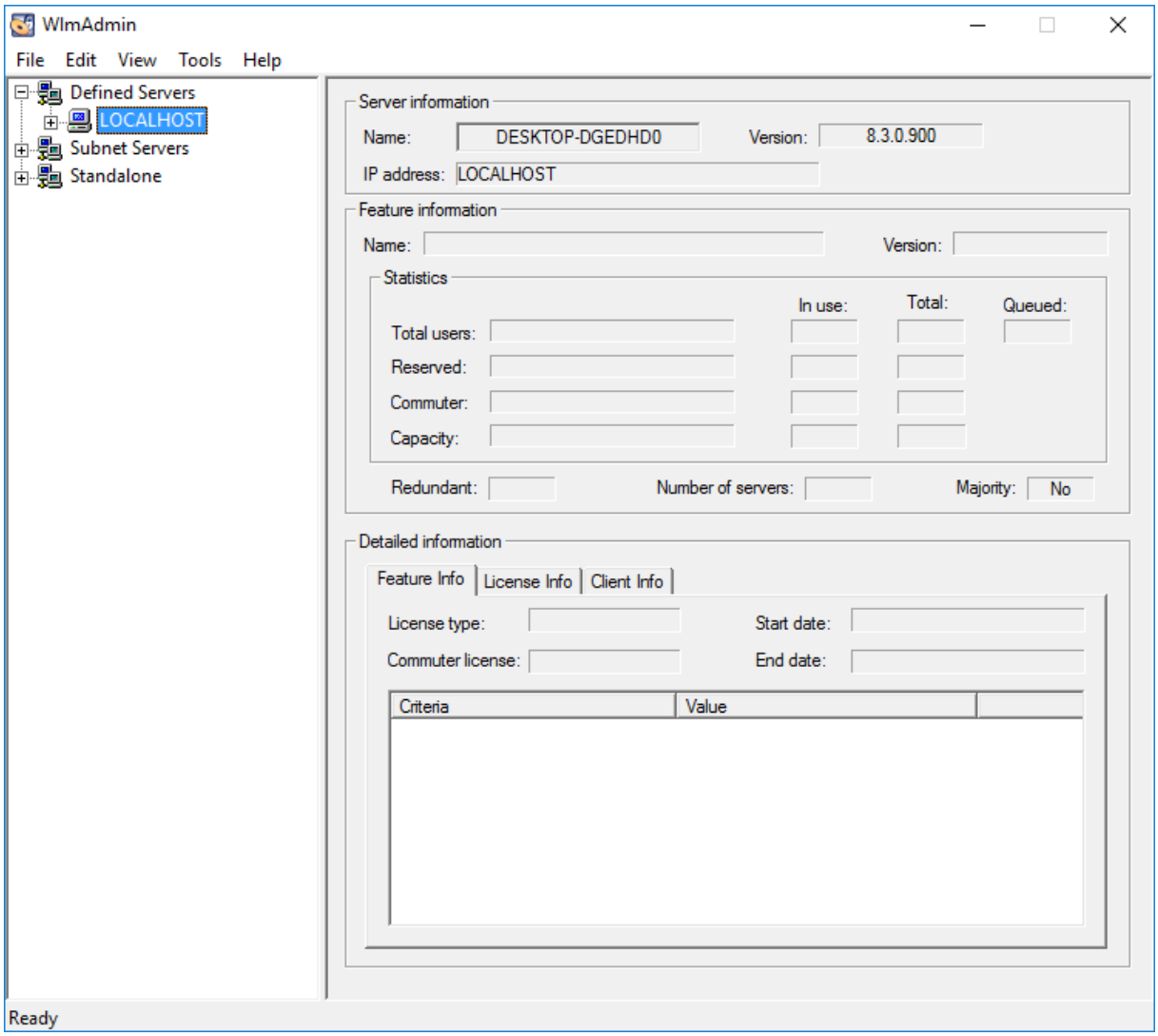

This interface will inform you about the status of all your licenses, servers, and is needed to install your Small Business Server licenses as explained in later steps of this help file.

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3.2.1.4 Activating SBS License

Just like with the standard CardExchange® Visitor licenses, the license manager needs to be activated to the Machine ID of the server or computer too. The only difference is that the network License cannot be activated with a CardExchange® Visitor client, but has to be done online via our website.

For activating the license we need to have the serial number, activation code, and the machine ID. The serial number and activation code are printed on the DVD box or you may have received them digitally via email. The machine ID needs to retrieved with a simple

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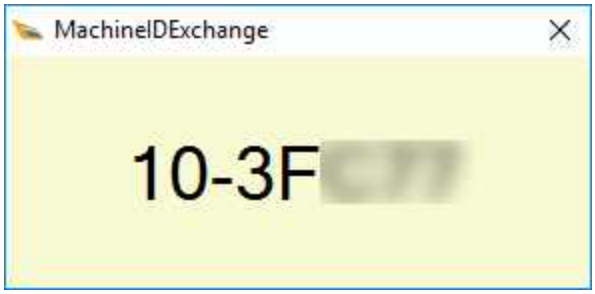
application that is available on this DVD. It is important that you run this application on the server or computer that is going to contain the license manager.

Now click on the Retrieve Machine ID button to start the MachineIDExchange application:



If you are using a external license dongle, the machine ID will start with 80. For using an external license dongle, please install the dongle driver first. For instructions, please see the Using License Dongle 433 section of this manual.

If you have retrieved the Machine ID and written it down. Now open the activation page on our website by clicking on the url below or copy and paste it into your browser:
https://cardexchangesolutions.com/cardexchange-assist/online-license-activation

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Or click the License activation button in the menu.

Now enter all the information like serial number, activation code, and the machine ID into the fields like shown below:

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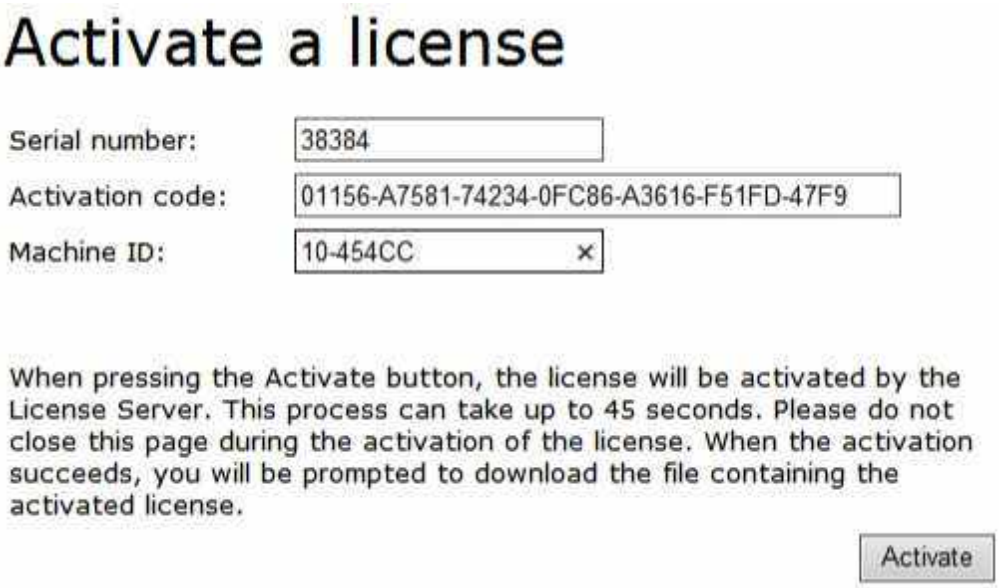

And click on Activate to start the activation process of the license. Activating an SBS license can take up to 45 seconds. do not close the web page during the activation!

When the license has been activated you will be prompted to download the activated license file with the extension *.LIC. This file needs to be saved to a location that can be accessed by the computer that is running the license manager

3.2.1.5 Configuring License Manager

When the license has been activated, you can now configure the License Manager. To do so you have to start the WlmAdmin.exe application as explained in the License Manager Tools 52 section of this manual.

When the application is started we first need to set the Preferences of the license manager. To do so, select Preferences from the Edit menu as shown below:

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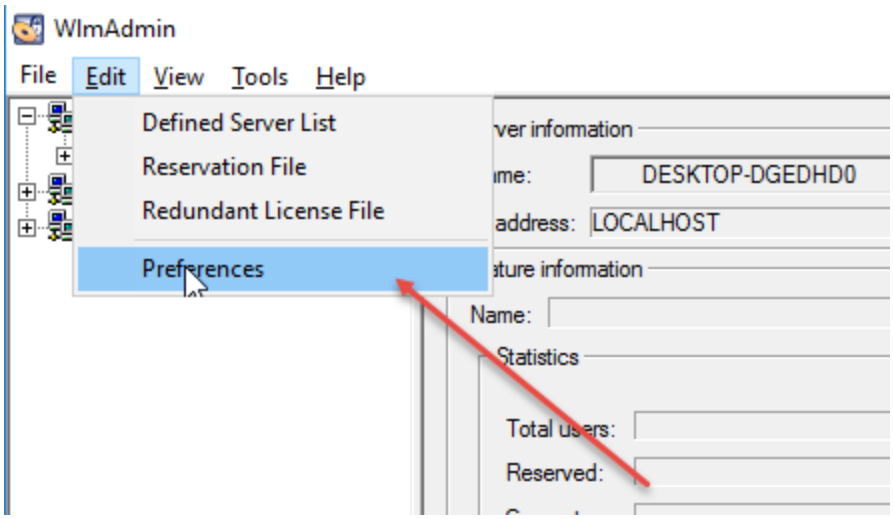
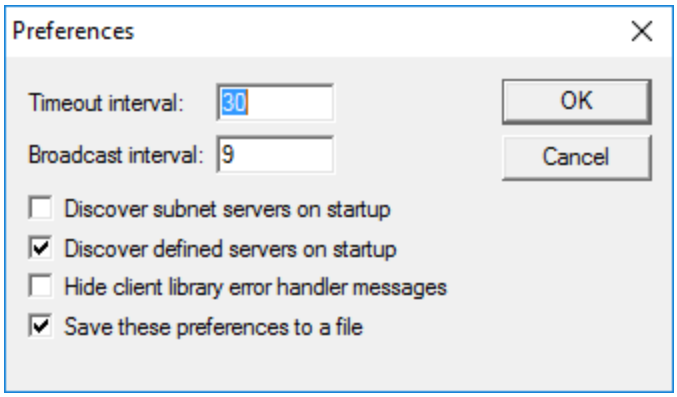


This will open the Preferences window:



Make sure that you set all the options as shown in the screenshot; Check "Discover defined servers on startup" and "Save these preferences to a file". Click on OK to set the preferences and close the Preferences window.

Now we need to define the server that is going to hold the licenses. To do so, select Defined Server List from the Edit menu as shown below:

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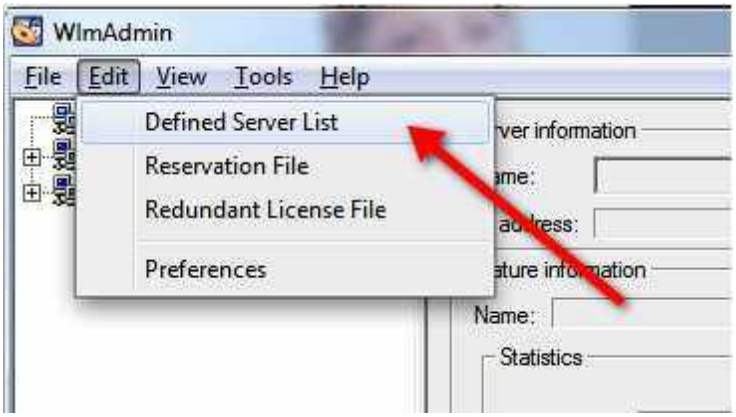
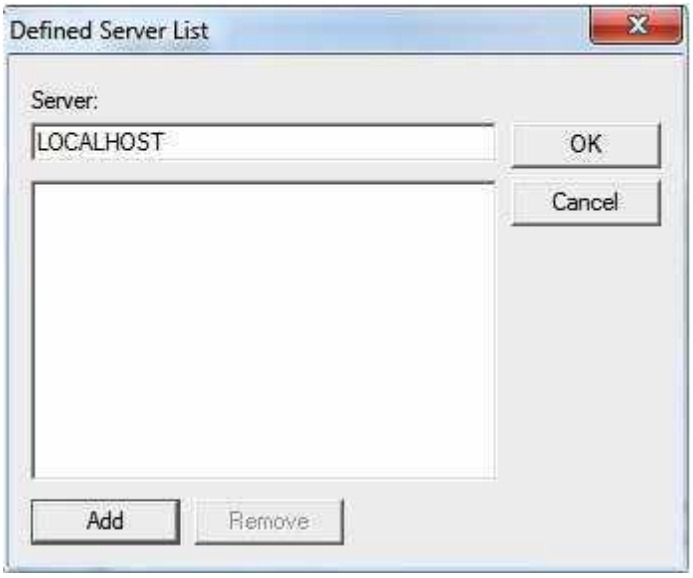
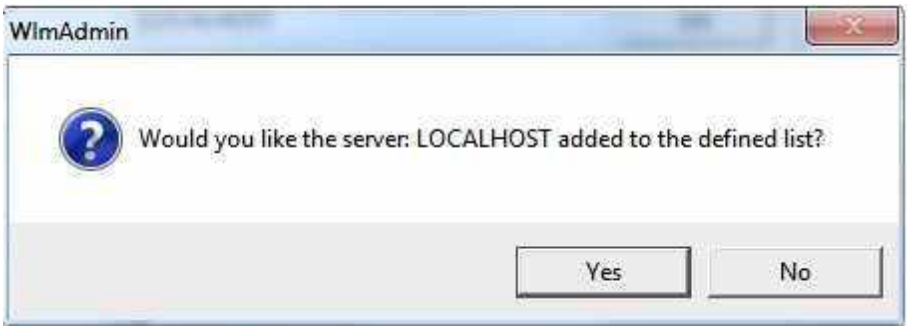


This will open the Defined Server List window:



Now enter "LOCALHOST" and click on Add to add the server name and OK to close the Defined Server List window. You will be asked to add the server to the defined list:



Click Yes to confirm.

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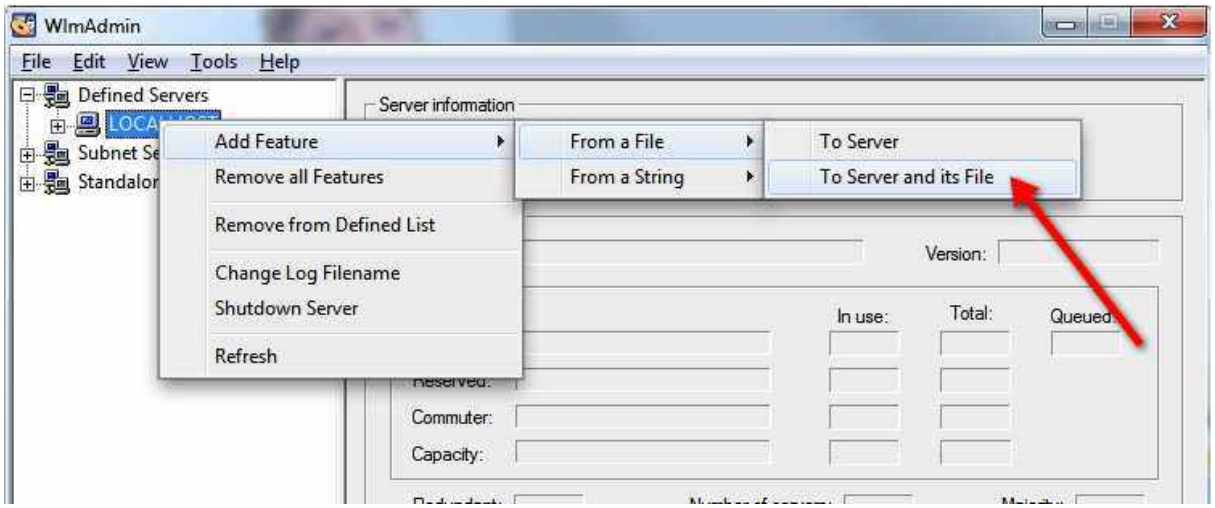
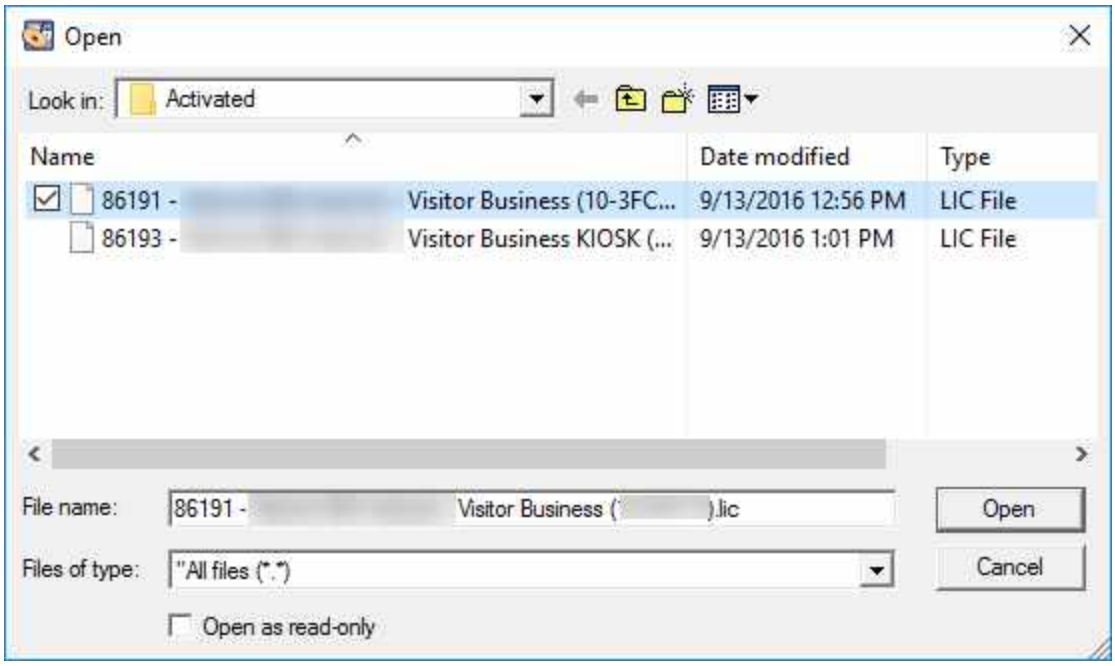
Now we need to add the license file to the license manager. To do so, right click on the LOCALHOST node in the Defined Servers tree and select **Add Feature -> From File -> To Server and its File** as shown below:



Browse to the location of the downloaded license file with the extension LIC, as shown below:



And click on Open. The licenses will now be installed and if the installation succeeds, the window below will be shown:

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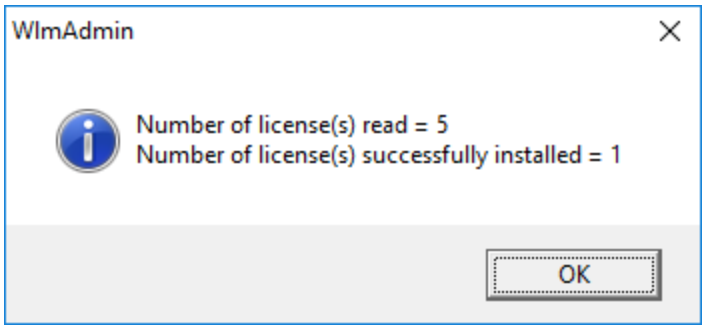

This message box indicates the amount of licenses that it was able to read from the license file and the amount of licenses that was successfully installed. Of course this number is depending on the amount client licenses purchased. Click on OK to confirm the installation.

The **LOCALHOST** node should now have one sub node for each license code as shown below:

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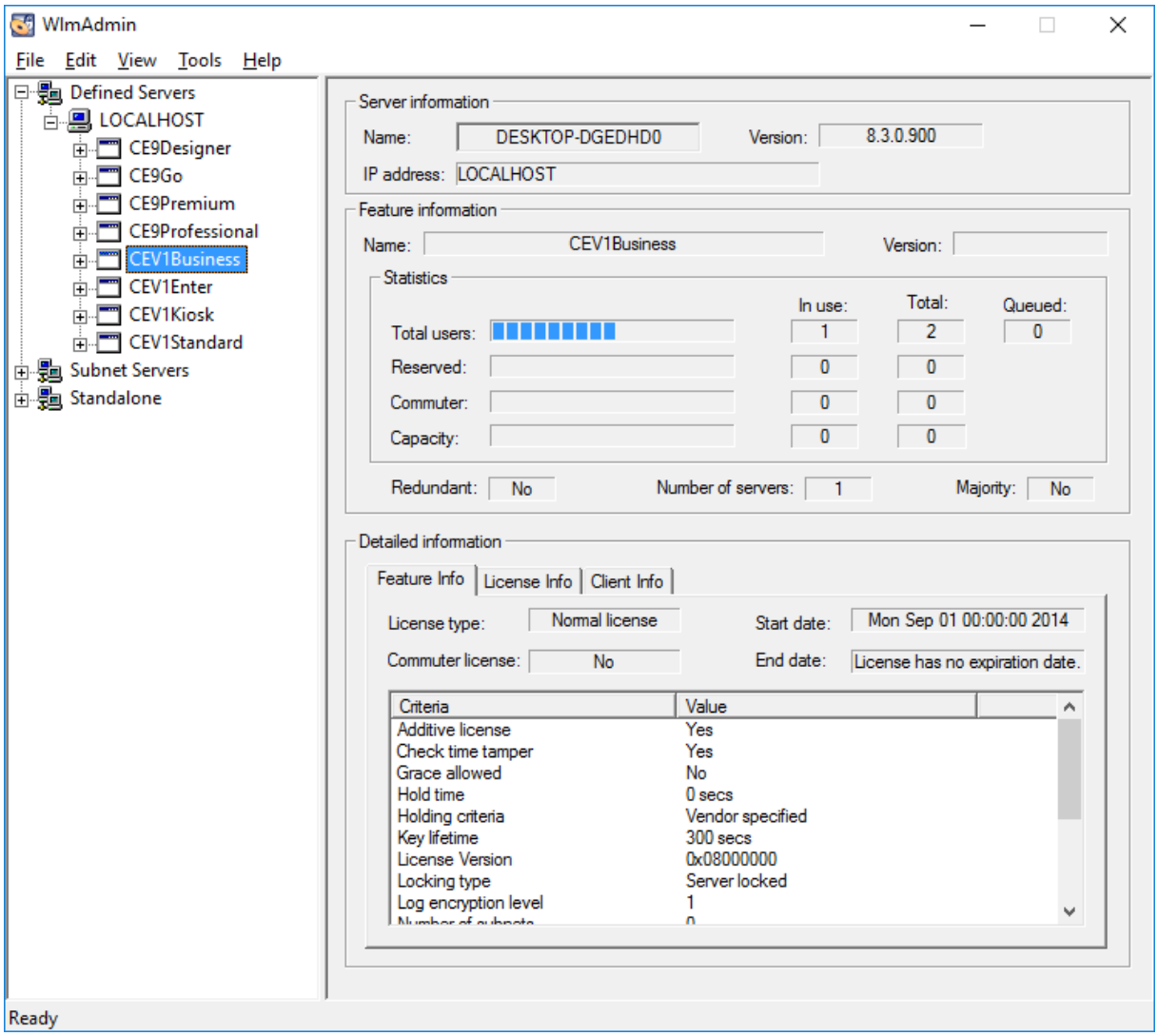

By selecting the license, you can see in the license manager GUI how many licenses are available and how many licenses are in use.

Don't forget, the License Manager is a Windows service and this GUI does not need to be started to have the system working. After you are done with the configuration, you can close this window.

This concludes the installation and configuration of the License Manager and Procedure One. Now we start installing the CardExchange® Visitor clients on the Desktop computers or on the server. This process is explained here 65.

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3.2.2 Installing Gateway Client

In this section we will explain the installation of the CardExchange® Gateway client(s) and how to configure the license:

- Step 1 - Install CardExchange® Visitor Client 66
- Step 2 - Configure Client License 73

Configuring shared folders, and configuring the Database connectivity for CardExchange® Visitor (if applicable) are covered here:

- Step 3 - Configure Shared Folders 88
- Step 4 - CardExchange® Visitor Database Connectivity 88

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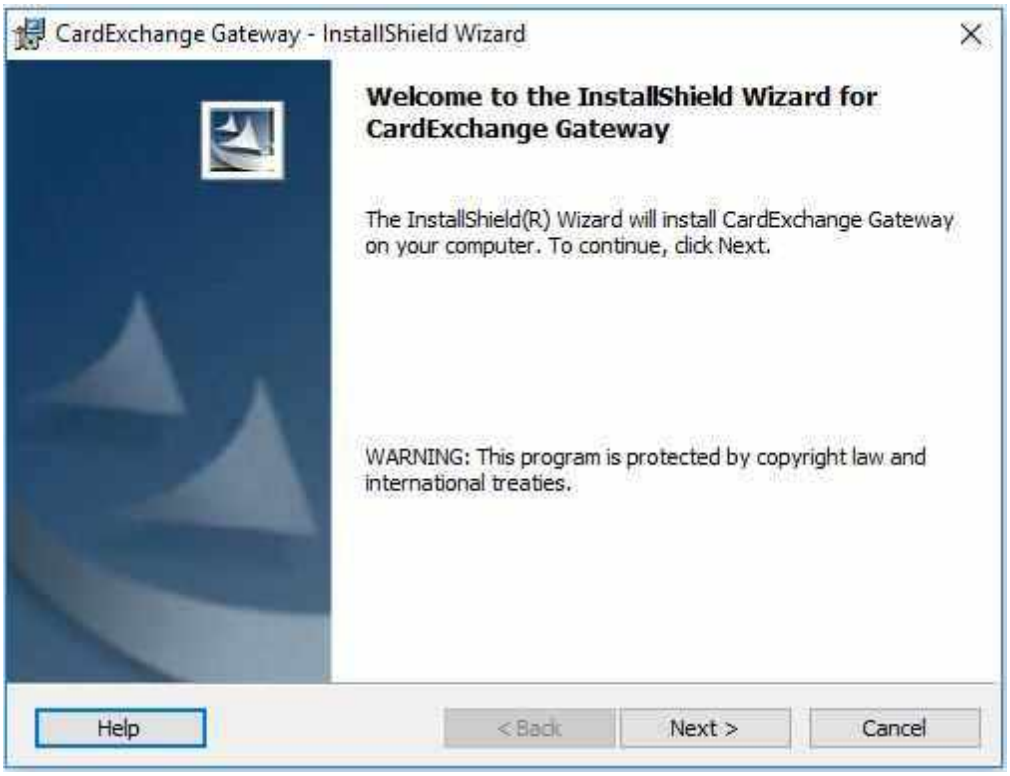
3.2.2.1 Install CardExchange Gateway Client

CardExchange® Visitor users a standard InstallShield Wizard, during the installation the installer will start checking the system requirements. The important thing that will be checked by the installer is that the .NET Framework 4.8 is installed. When not available, the installer will automatically start downloading this. If there is no internet connection available, it will automatically install it from DVD. If you are using the downloaded trial version and during the installation no internet connection is available, the installer will stop the installation process and you will be required to install the application manually.

The .NET Framework is normally available on the computer systems so we will not go deeper into this.

The CardExchange® Visitor installation wizard starts with the welcome page, now click Next to proceed:



In this wizard page, the License Agreement is presented. You can click on the Print button to print out the complete text of the agreement. If you agree to the terms, please select the "I accept the terms in the license agreement" option and proceed with Next. If you do not agree, please select the " I do not accept the terms in the license agreement" and click on Finish. The installation will be canceled:

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In the Customer Information page you can provide specific information like the user name and the organization. More important is to determine who is allowed to use this application. Here you can select the option "Anyone who uses this computer (all users)" which is default and we advice to use for standard installations. Especially important when multiple users have access and accounts on the target computer. Select "Only for me (user name)" if you want to make sure only this user has access to the application. Click Next to proceed:

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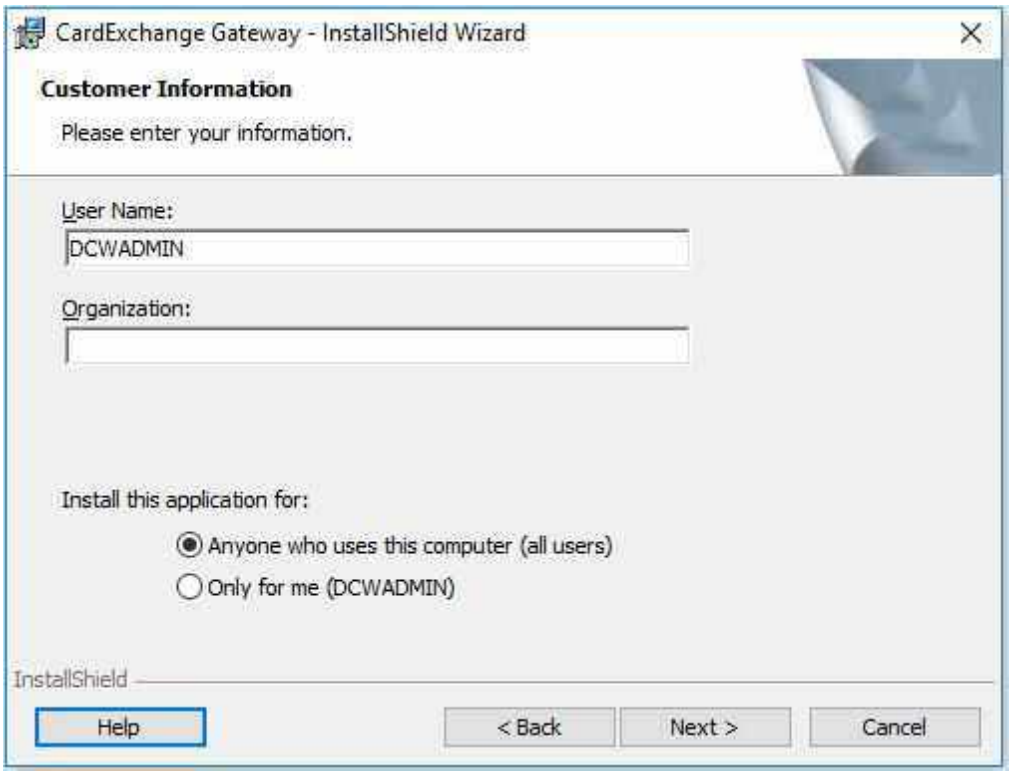

CardExchange® Visitor installations are compliant with Windows standards which means that by default the application is installed in the Program Files (x86) folder as shown in the screen shot below. The folder will be automatically created during the installation. Click on the Change button if you want to install CardExchange® Visitor to a different location. Click Next to proceed:

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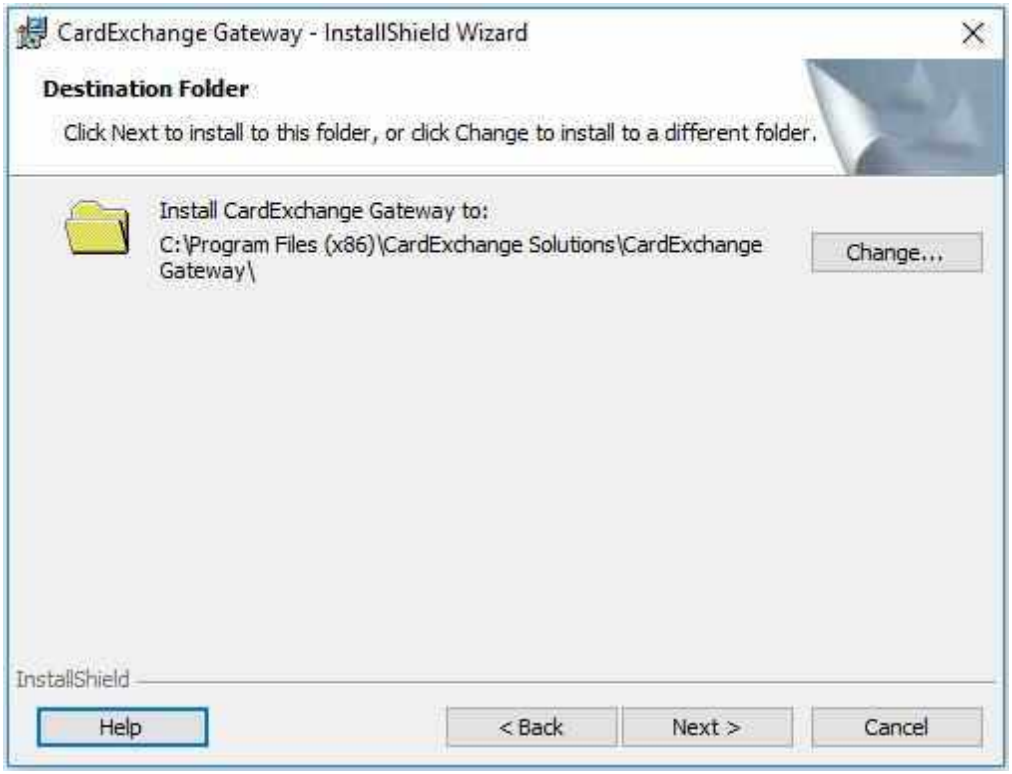

The Database folder of CardExchange® Visitor is one of the most powerful and flexible features of the CardExchange® Visitor application. It contains all your card templates, database, saved documents, etc. It is very important to install this database folder on a location that can be accessed by the user or by more users of the computer. The CardExchange® Visitor application reads and writes information from and to this folder and therefore the user needs to have read and write permissions to this location. By default it will be installed on Public section of your system, like as shown in the screenshot below. If you install this Data folder on a location that is not available for all users of the system, it will result in error messages and not being able to start up!

Make sure that you make regular backups of this Data folder. In case of a computer crash, this backup will save you a lot of work. You only have to install CardExchange® Visitor as normal and after the installation you replace the new Data folder with the backup and your system is up and running again! We advice to make a backup of the Data folder, every time you change something to your configuration. Click Next to proceed with the installation:

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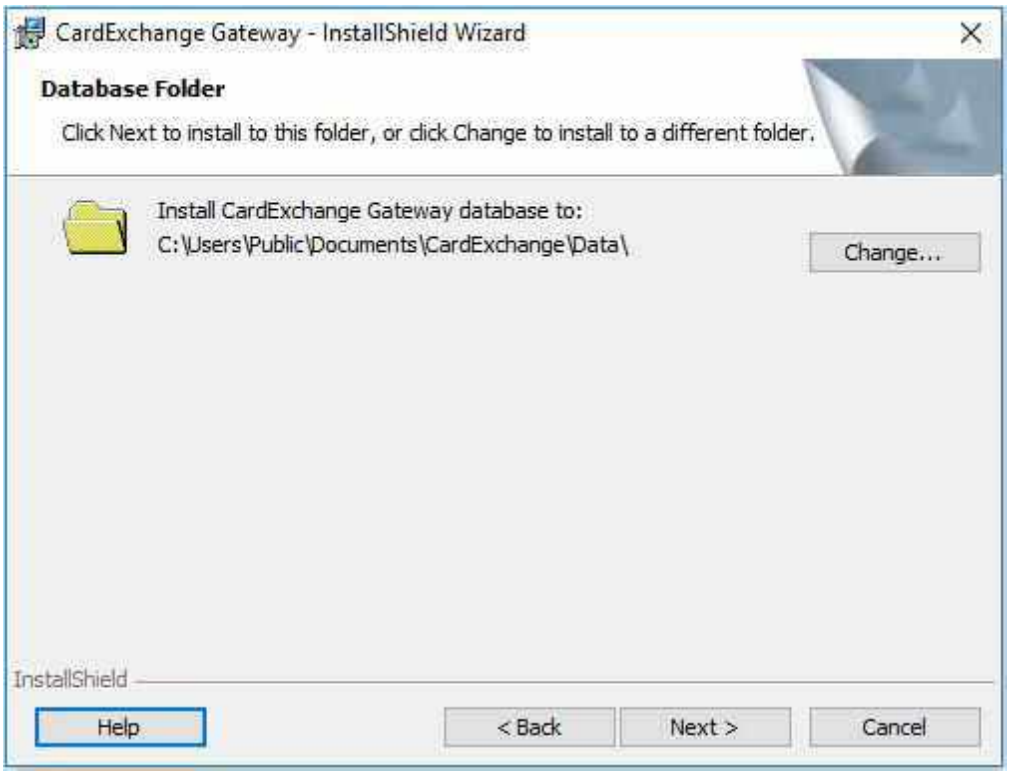
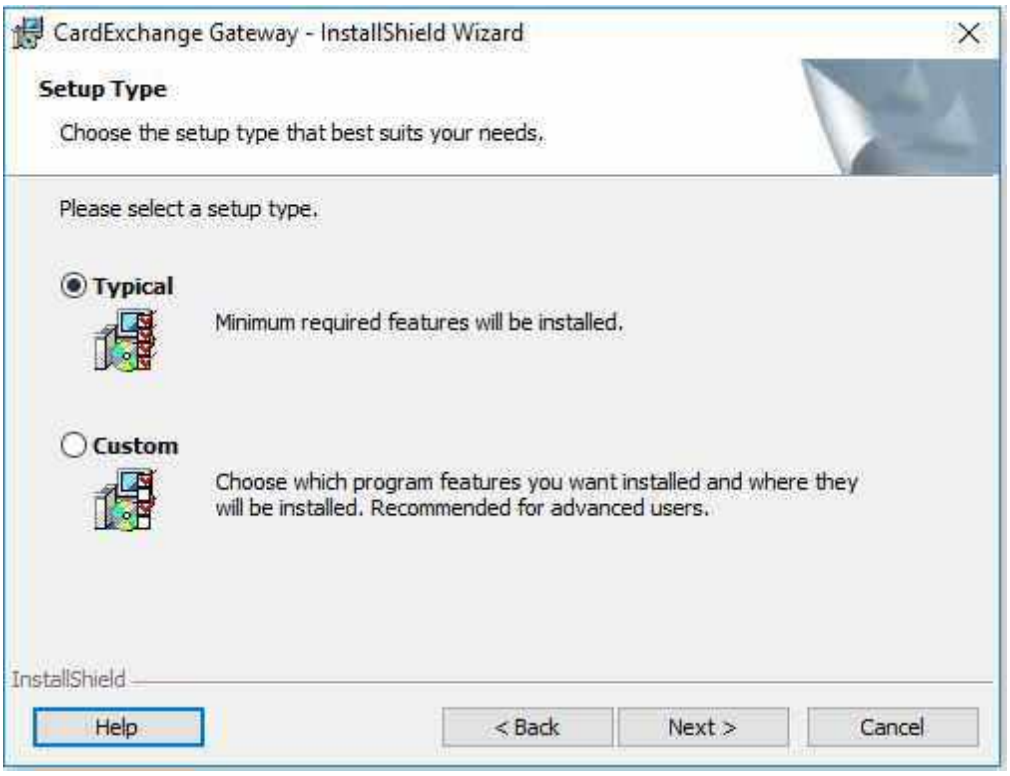


In the Setup type page you are asked to select the type of installation you want to proceed with. For standard installations, please select the Typical option.



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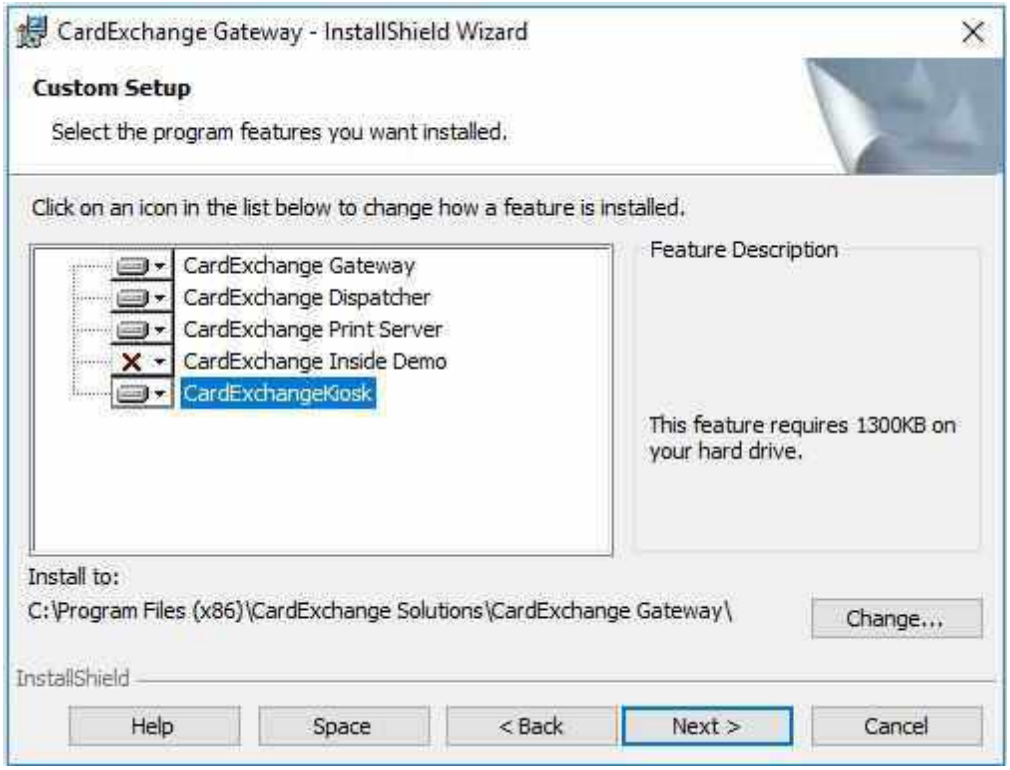
The Custom installation offers additional components that can be installed, these include the Kiosk..
You will require licenses for each of these additional components.



Now the installer has all the information to start installing CardExchange® Visitor on your system. Click Install to proceed:

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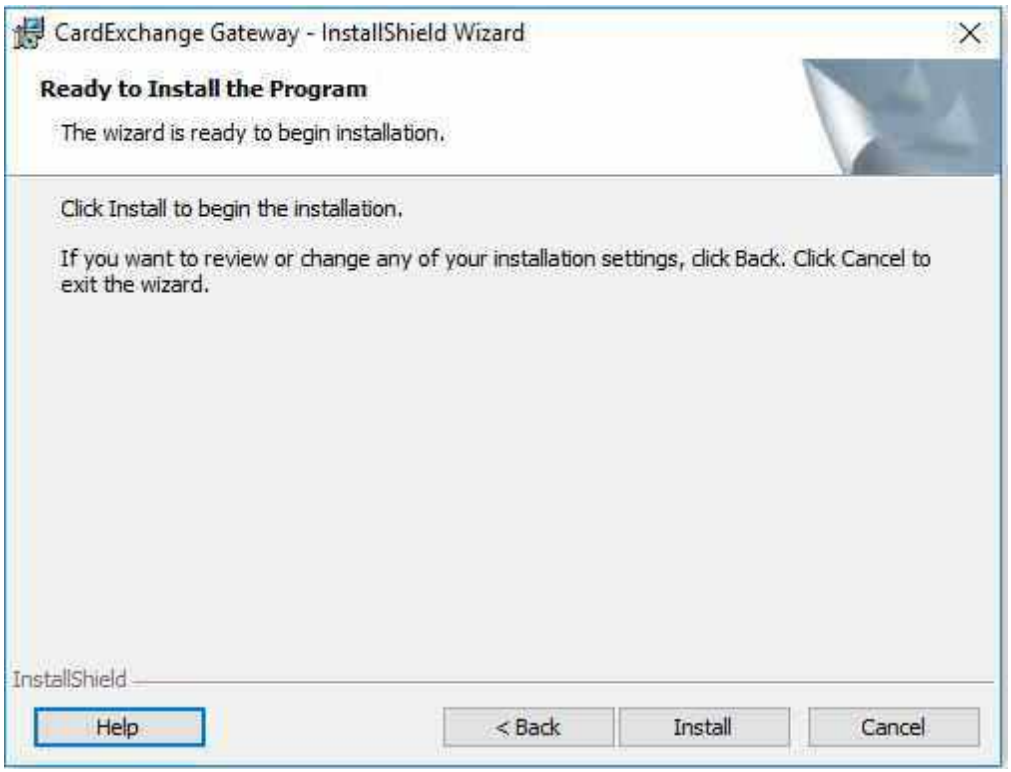

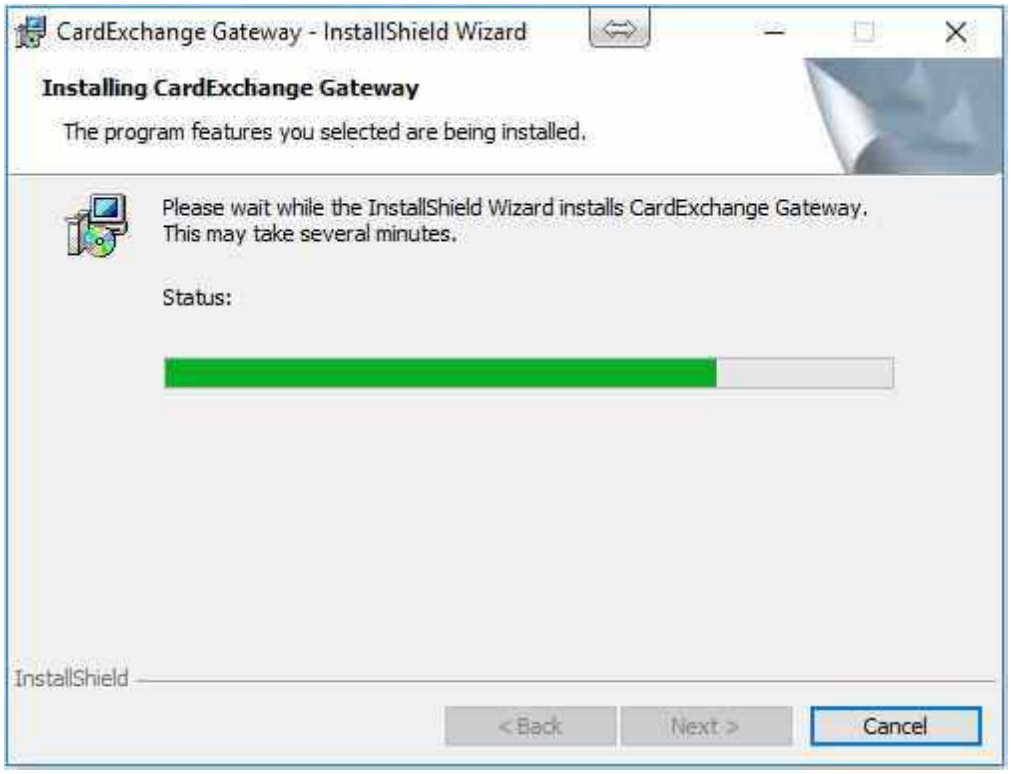

When the installation has succeeded, you can click on Finish to close the installer. Any temporary files will be removed from your system. You can run CardExchange® Visitor by

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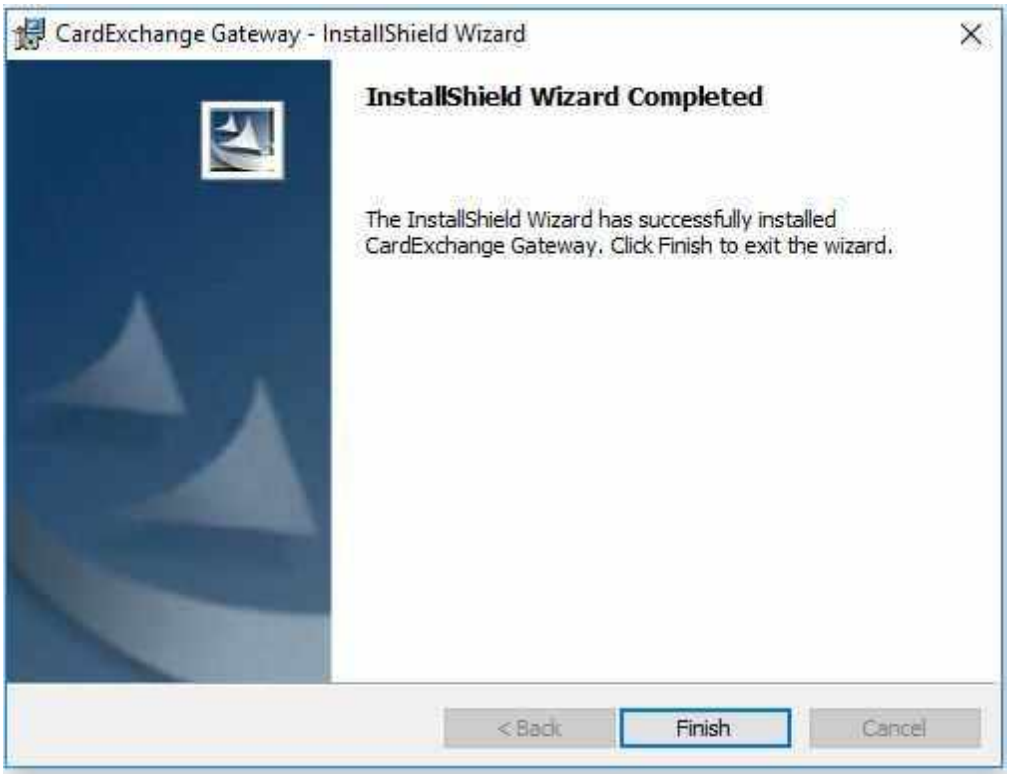
double clicking on the Desktop icon or select the application from the Windows Start menu.



Before running CardExchange® Visitor, please complete the configuration of the client license as detailed here 73.

3.2.2.2 Configure Client License

After you have installed the Client on your system(s), each client needs to be configured to get access to the license server. The location of the license manager is set in the CardExchange® Visitor Configuration file.

This CardExchange.ini file is located in the installation directory you selected during the installation, typically this would be C:\Program Files (x86)\CardExchange Solutions\CardExchange Gateway\ by default.

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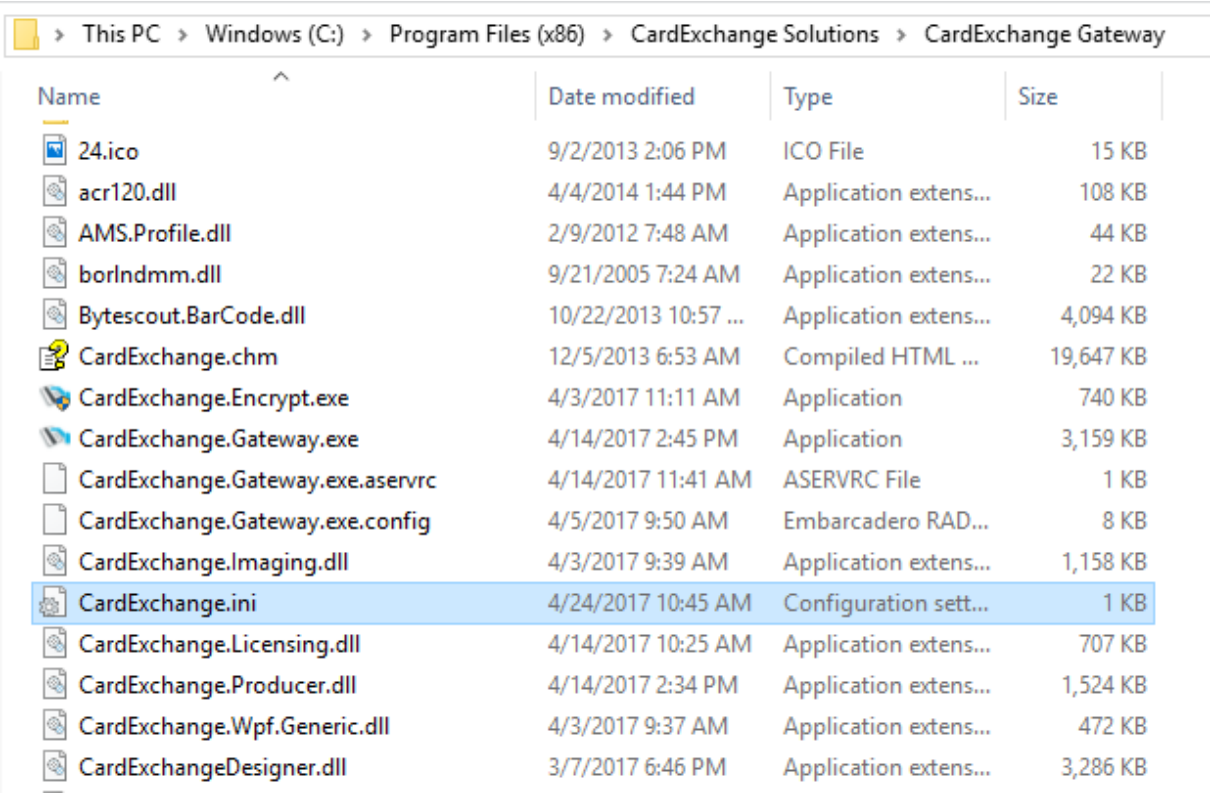

You can open and edit this file using Notepad or Notepad++

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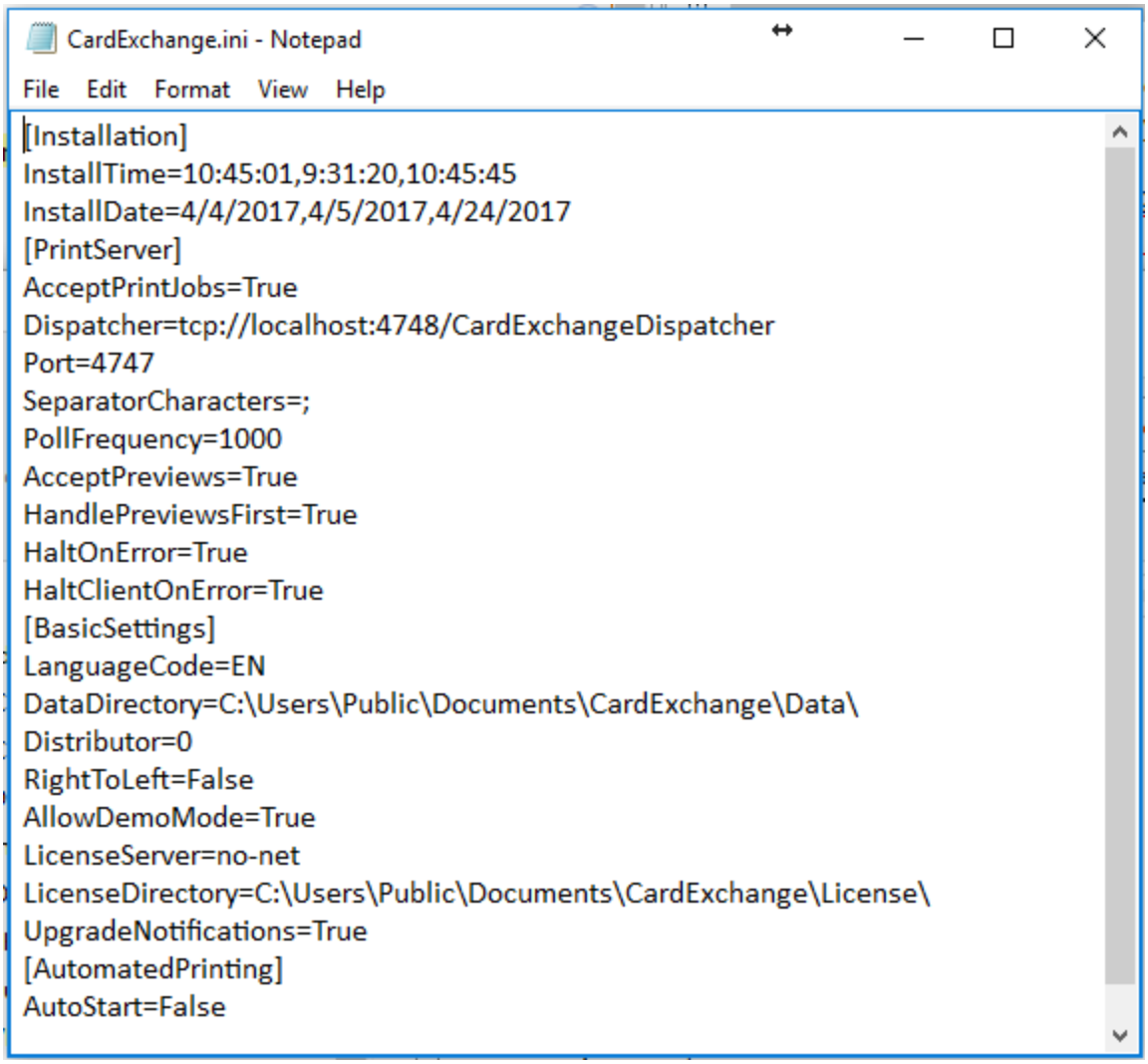

The location of the license server is set as the named entry **LicenseServer**. by default this entry is set to "no-net" and CardExchange® Visitor will use the **LicenseDirectory** during the start up.

Now replace the "no-net" with the name or the IP address of the server or computer that is running the license server.

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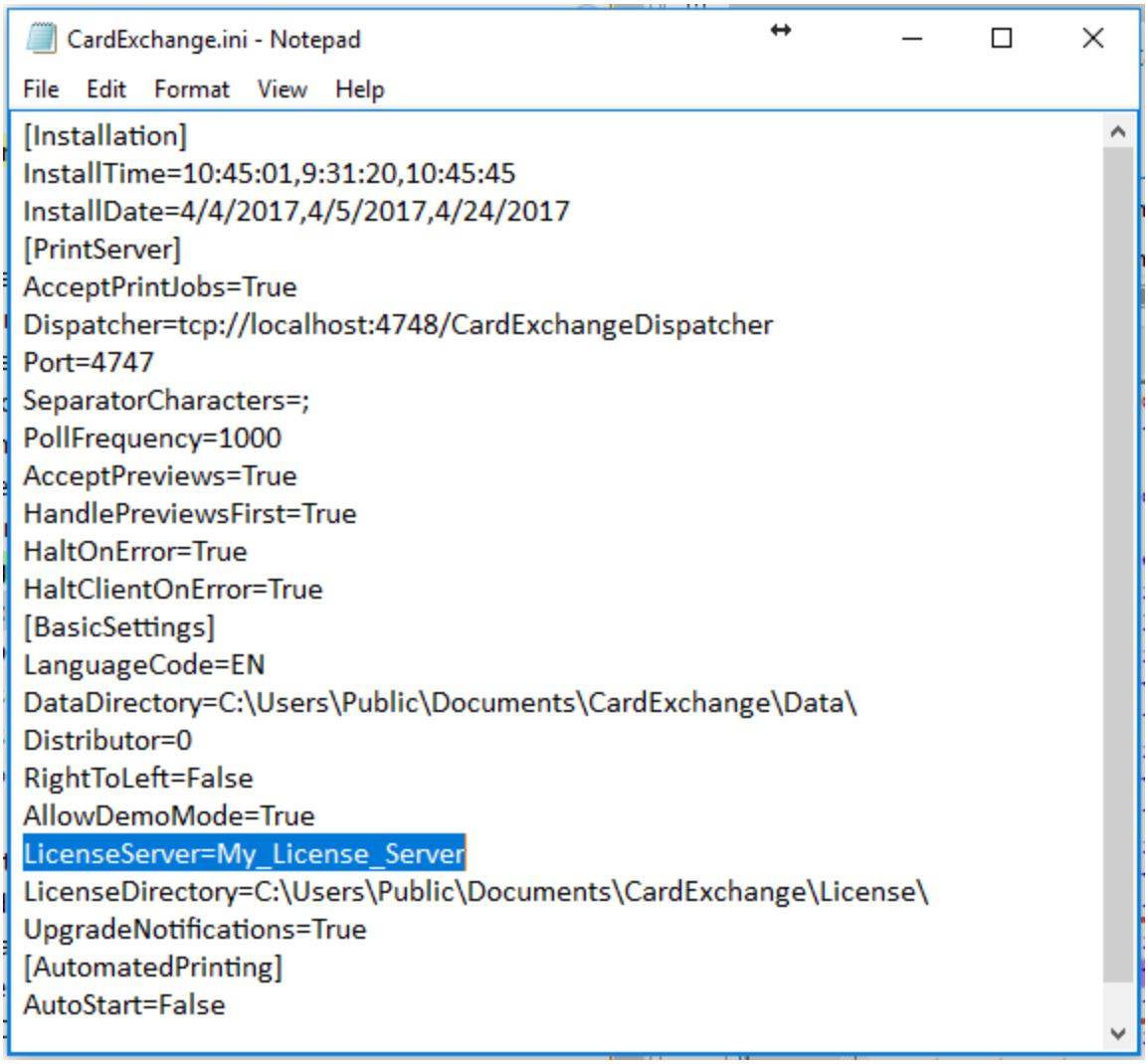

Now save the configuration file and start CardExchange® Visitor. When CardExchange® Visitor is starting, it will request a license from the license manager.

If available it will start directly, if all licenses are in use it will inform the user that all licenses are in use. As soon as another client is closed, the license will become available again.

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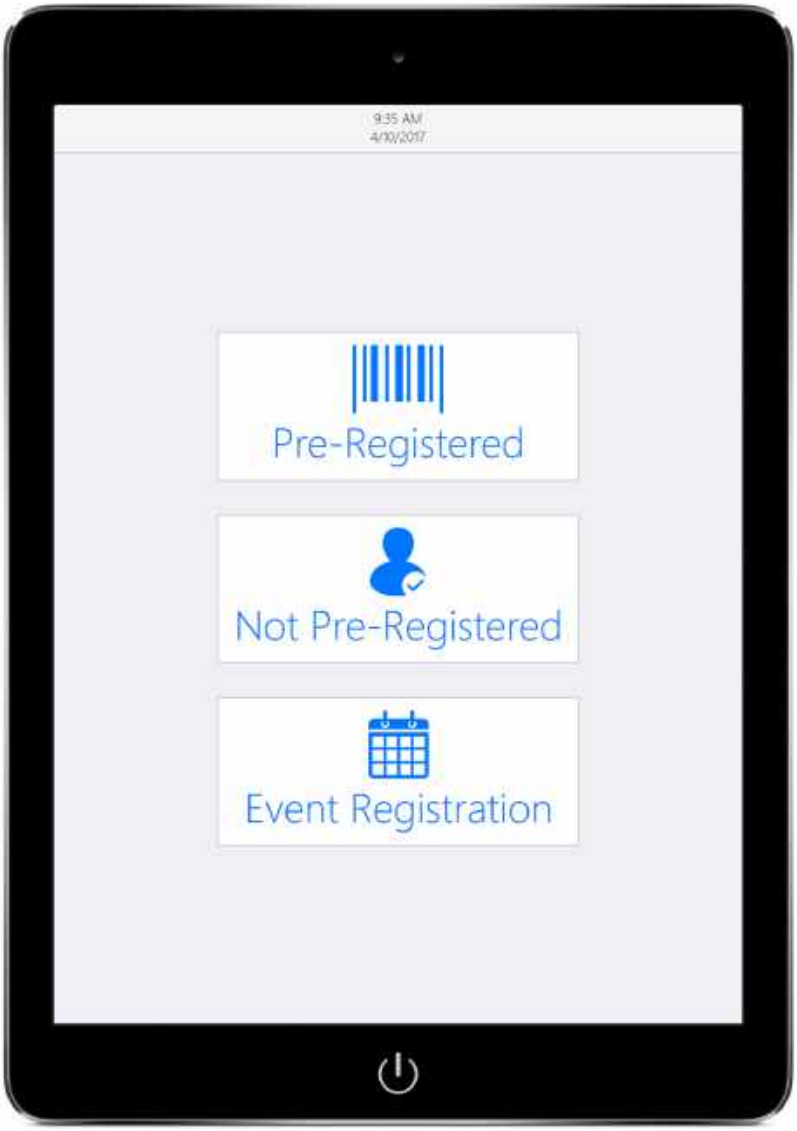
3.3 Installing CardExchange® Visitor KIOSK Client



Starting from the CardExchange® Visitor Business edition it is also possible to use the CardExchange® Visitor Kiosk Client. This is a stand-alone Kiosk application for self check-in and check-out by visitors.

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3.3.1 Installation

To install the Kiosk Client you will need to run the same installer that you used already to install the standard installation.

The CardExchange® Gateway installation wizard starts with the welcome page, now click Next to proceed:

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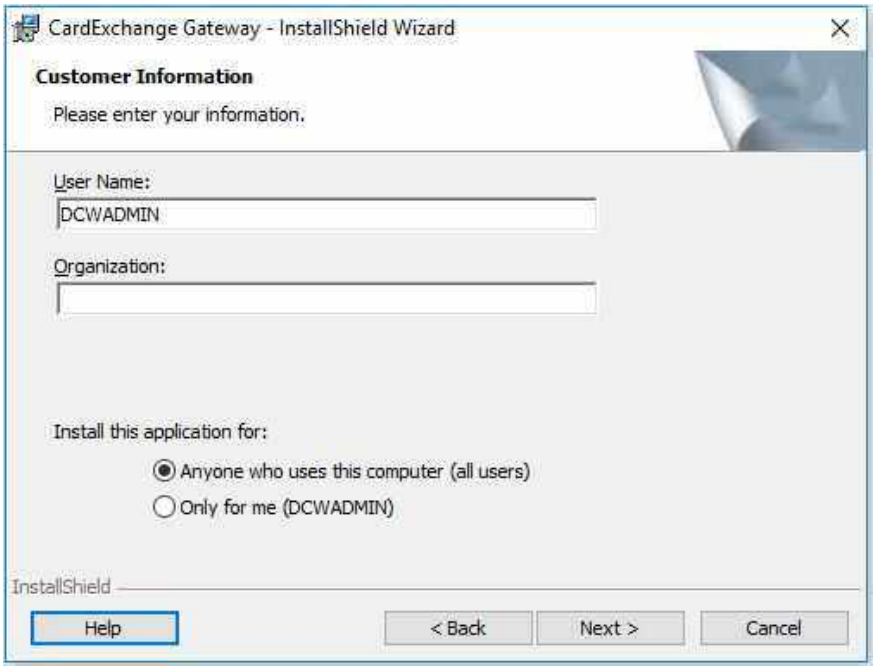
In this wizard page, the License Agreement is presented. You can click on the Print button to print out the complete text of the agreement. If you agree to the terms, please select the "I accept the terms in the license agreement" option and proceed with Next. If you do not agree, please select the " I do not accept the terms in the license agreement" and click on Finish. The installation will be canceled:



In the Customer Information page you can provide specific information like the user name and the organization. More important is to determine who is allowed to use this application. Here you can select the option "Anyone who uses this computer (all users)" which is default and we advice to use for standard installations. Especially important when multiple users have access and accounts on the target computer. Select "Only for me (user name)" if you want to make sure only this user has access to the application. Click Next to proceed:

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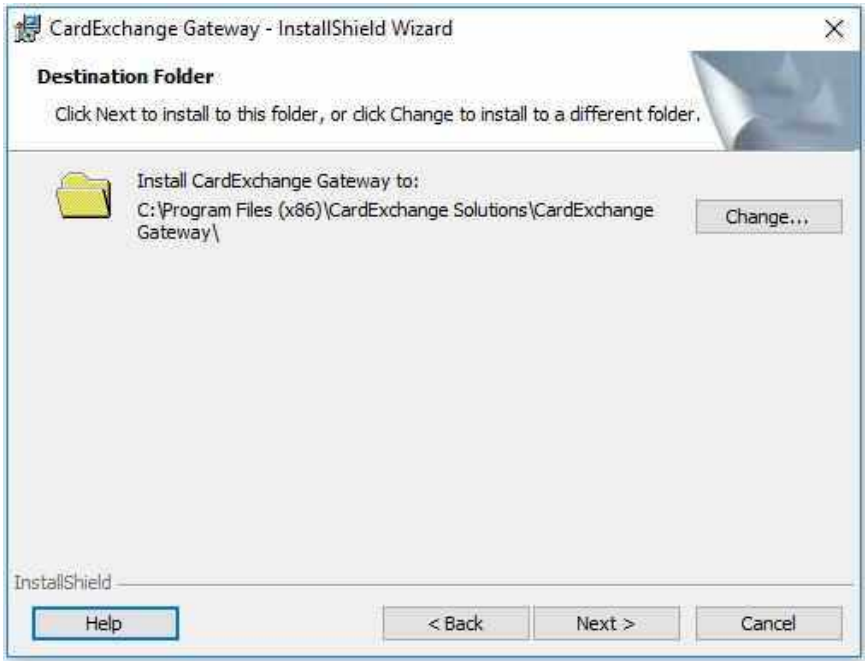
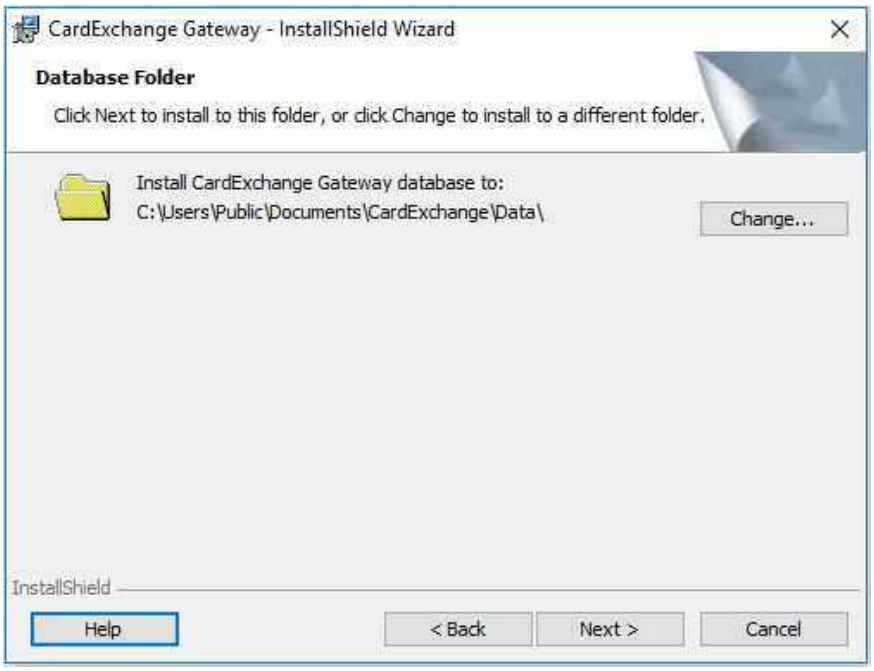


CardExchange® Gateway installations are compliant with Windows standards which means that by default the application is installed in the Program Files (x86) folder as shown in the screen shot above. The folder will be automatically created during the installation. Click on the Change button if you want to install CardExchange® Gateway on a different location. Click Next to proceed:



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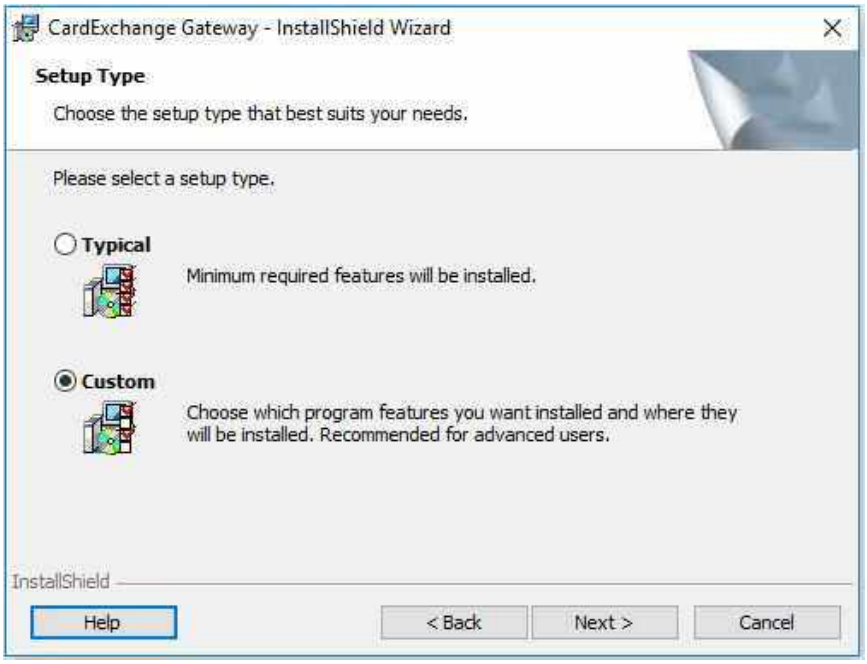
The Database folder of CardExchange® Gateway is one of the most powerful and flexible features of the CardExchange® Gateway application. It contains all your card templates, database, saved documents, etc. When installing the CardExchange® Visitor Kiosk Client, this path must point to the location of an already configured CardExchange® Visitor installation.



In the Setup type page you are asked to select the type of installation you want to proceed with. For CardExchange® Visitor Kiosk Client installations, please select the Custom option.

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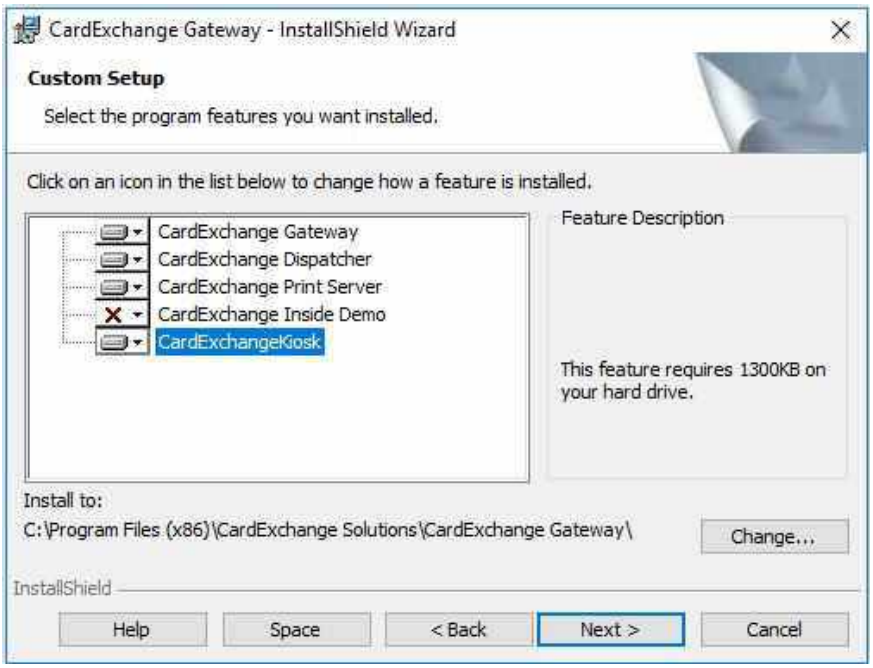
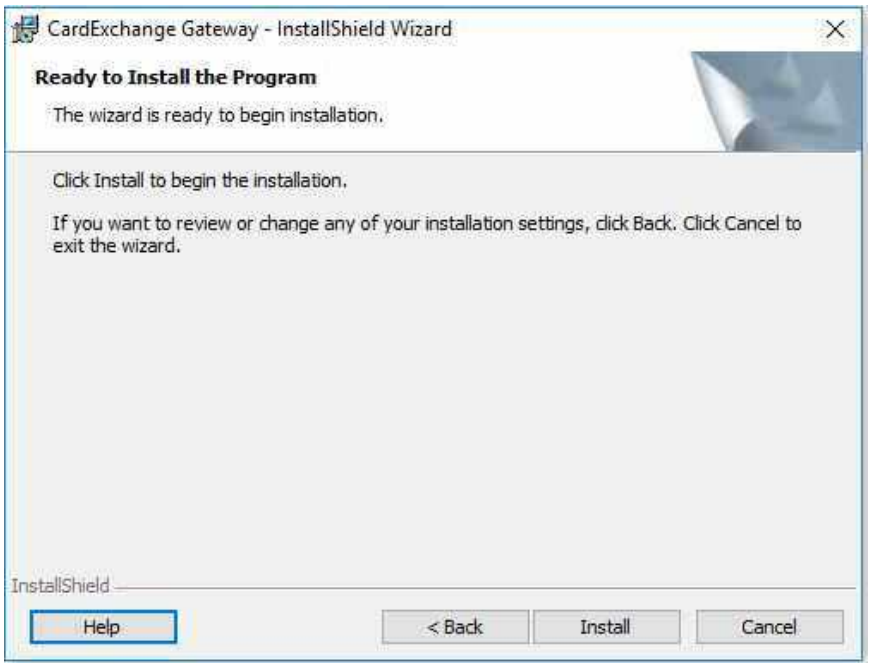


Here you can choose to install the CardExchange® Visitor Kiosk Client, you can also choose not to install CardExchange® Gateway as it is likely that you do not want to also use this on the same kiosk.



Now the installer has all the information to start installing CardExchange® Visitor on your system. Click Install to proceed:

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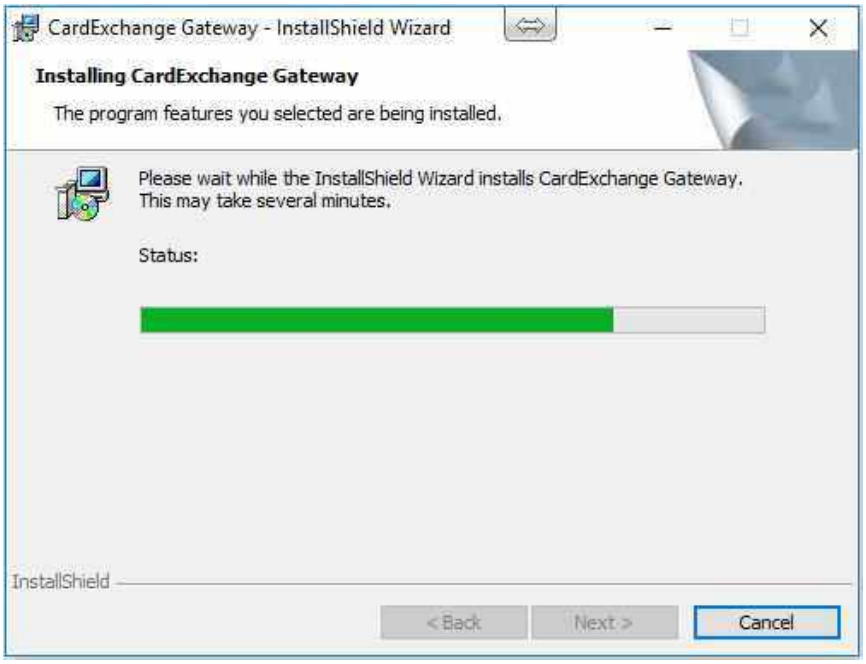

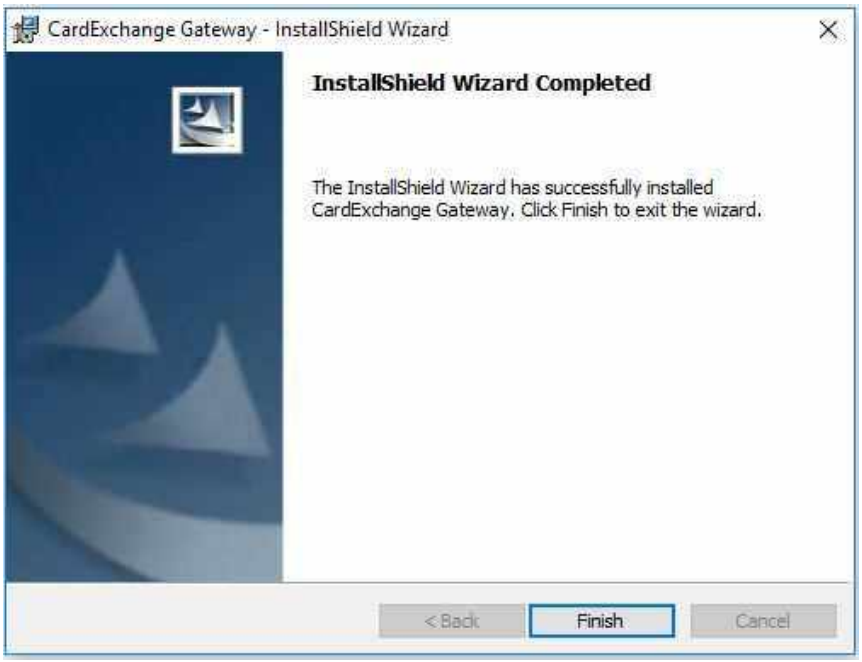

When the installation has succeeded, you can click on Finish to close the installer. Any temporary files will be removed from your system.

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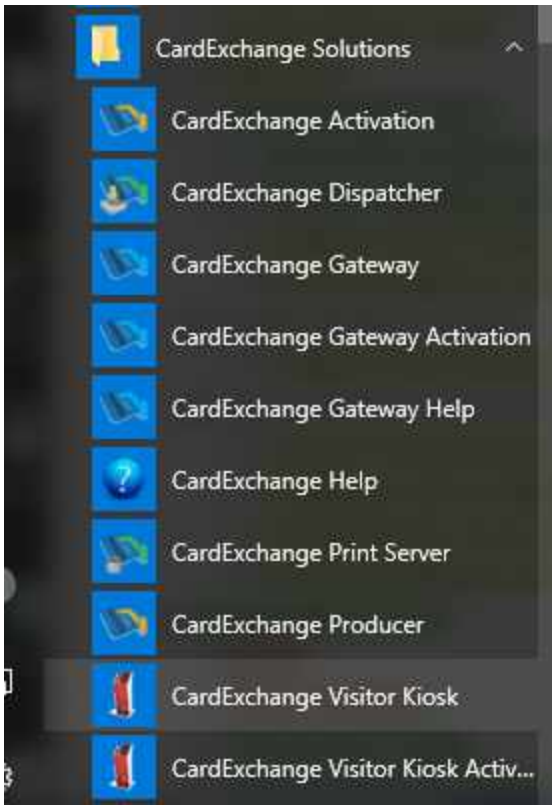

You can run the CardExchange® Visitor Kiosk Client by selecting the CardExchange Visitor Kiosk option in the start menu or by using the desktop shortcut.

3.3.2 Configure Kiosk Client License

The CardExchange® Visitor Kiosk client can be activated either locally to a specific PC as a stand-alone license, or by using a Small Business Server (SBS) license depending on the setup you have and the license type purchased.

To activate a stand-alone license please follow the steps here 35.

To configure a CardExchange® Visitor Kiosk client to work with an (SBS) license, please follow the steps below:

After you have installed the KIOSK client on your system(s), each client needs to be configured to get access to the license server. The location of the license manager is set in the CardExchange® Gateway Configuration file.

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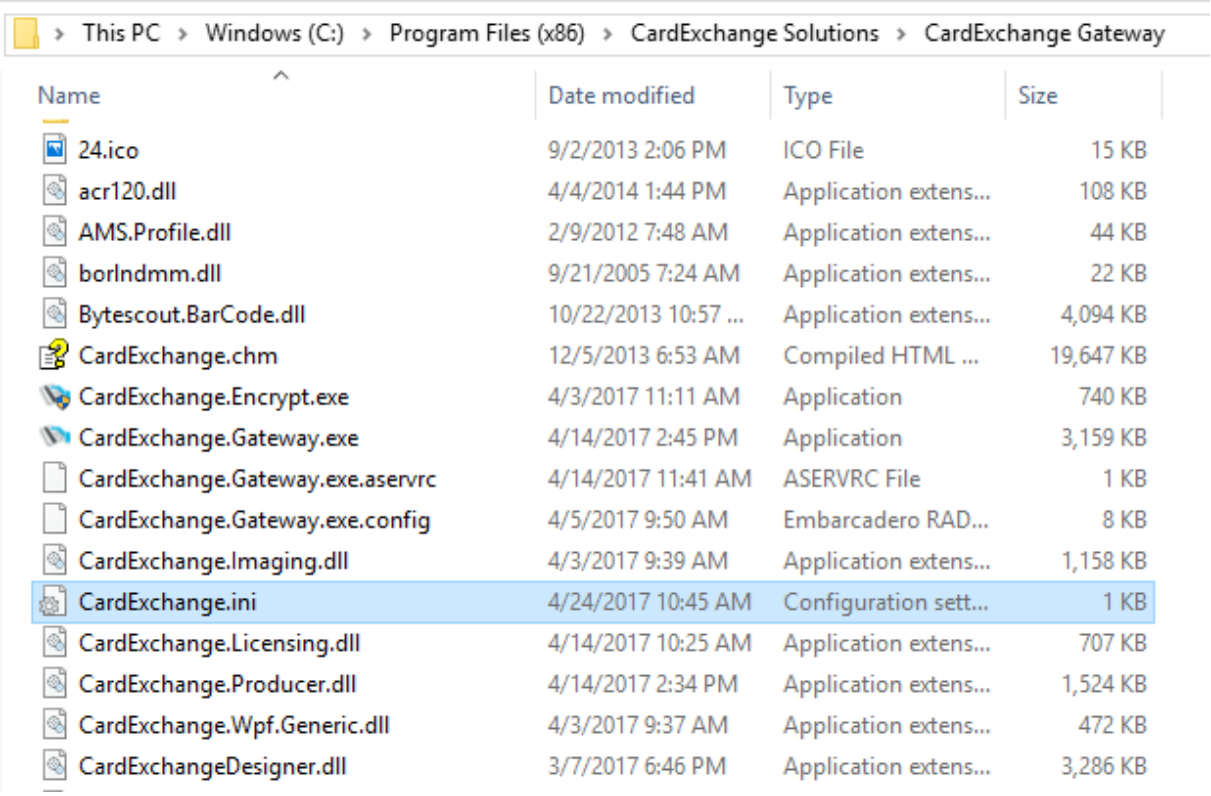
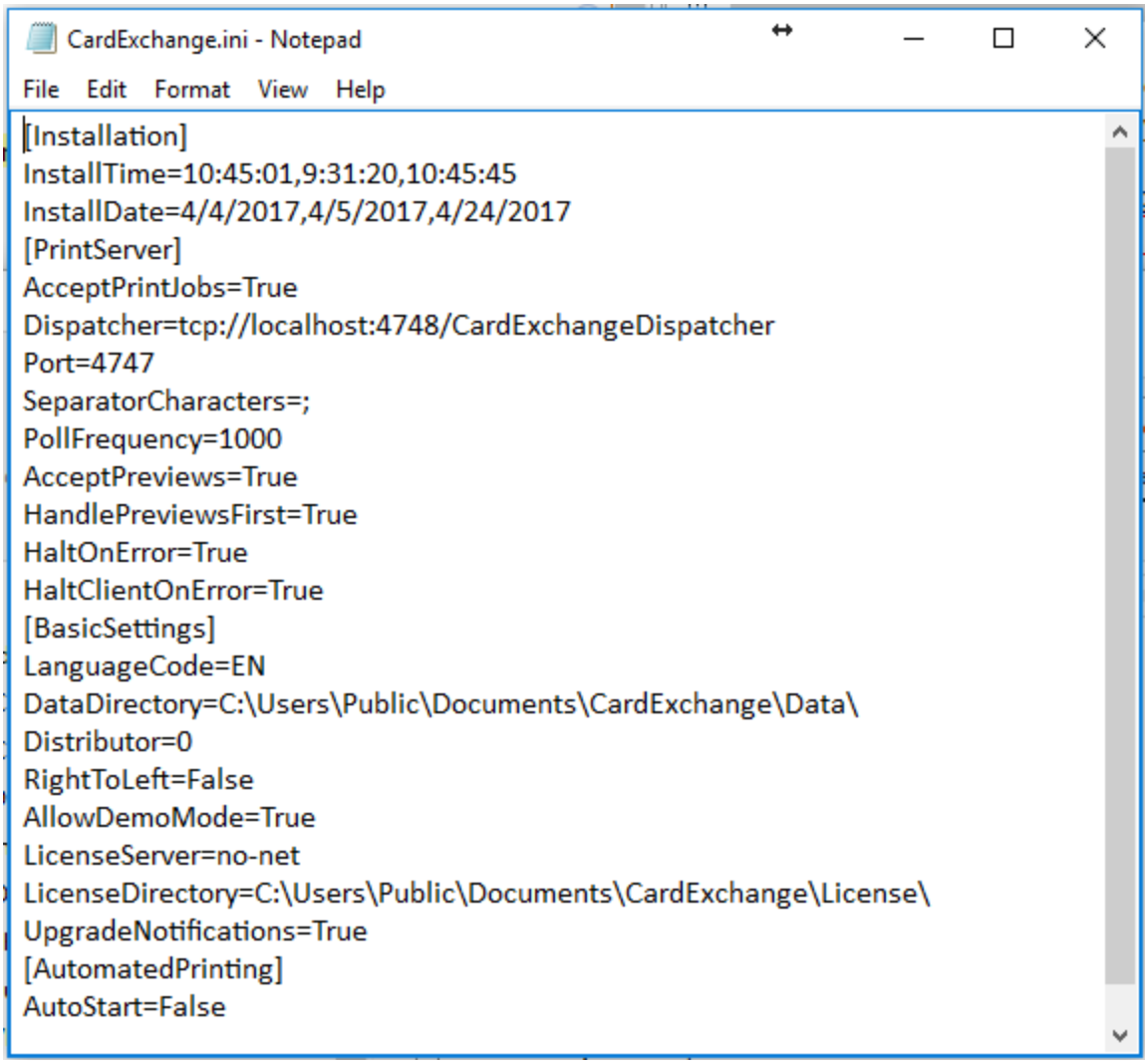
This CardExchange.ini file is located in the installation directory you selected during the installation, typically this would be C:\Program Files (x86)\CardExchange Solutions\CardExchange Gateway\ by default.



You can open and edit this file using Notepad or Notepad++

© 2020 CardExchange Solutions, Inc.



The location of the license server is set as the named entry **LicenseServer**. by default this entry is set to "no-net" and CardExchange® Visitor Kiosk will use the **LicenseDirectory** during the start up.

Now replace the "no-net" with the name or the IP address of the server or computer that is running the license server.

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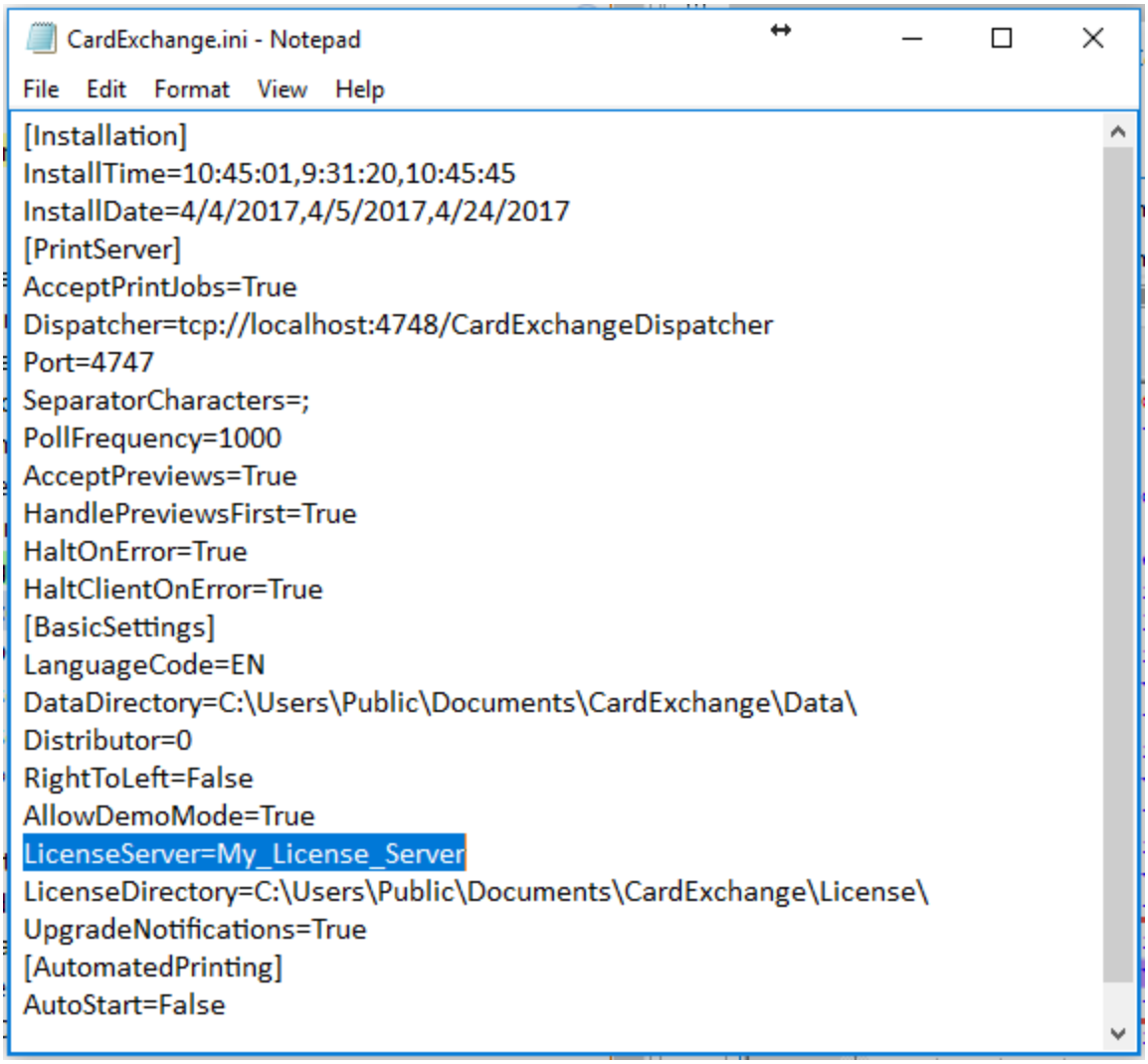

Now save the configuration file and start the CardExchange® Visitor Kiosk client. When CardExchange® Visitor Kiosk is starting, it will request a license from the license manager.

If available it will start directly, if all licenses are in use it will inform the user that all licenses are in use. As soon as another client is closed, the license will become available again.

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4 Configuration

In this section we will cover the configuration of different folder locations for each product as well as database setup and encryption for the configuration files.

For standard installations these steps may not be necessary as the configuration will all be stored locally under the public documents folder.
When using higher editions and sharing configuration between installations, this is when these changes may need to be looked at.

4.1 CardExchange® Visitor

All editions of CardExchange® Visitor come with an internal SQLite database. If you are using each edition as a standalone application and not using multiple clients, then the standard SQLite database will do the job without any problems. If that is the case, you can ignore this section of the installation manual.

Starting from the CardExchange® Visitor Business edition it is also possible to connect to MySQL and SQL Server databases, if you are setting up a multiple client environment on your network with for example, different buildings, lobbies, etc., we strongly advice to use this server based database support.
Although technically SQLite could handle multiple sessions, the database gets locked on the moment a client writes to the database and it can happen that, when another client attempts to write to this database at the same time, data problems or errors can occur.

So if you are using a multiple client environment we strongly advice to use either a MySQL or SQL Server database.

4.1.1 Using MySQL Database Server

This section of the help file will explain how to install the MySQL database server and how to setup and configure the MySQL database. If you already have a MySQL database server running in your organization you can skip the installation step and go directly to the Configuration of the MySQL Database 103 otherwise go to the Installation the Database Server 89 section.

Note: Connection to MySQL and SQL Server databases is only possible with CardExchange® Visitor Business edition.

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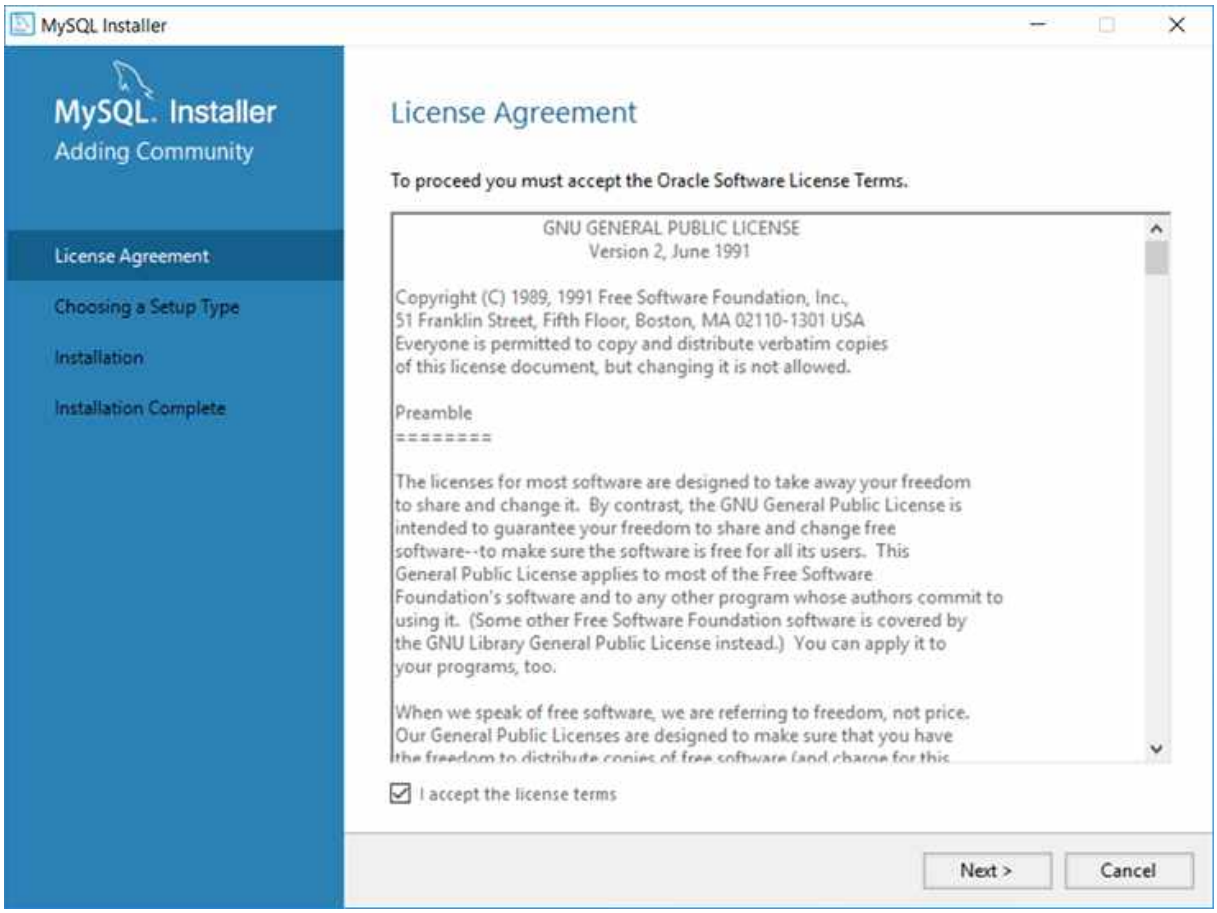
4.1.1.1 Installing MySQL Database Server

The MySQL installer is available on your CD that you received from your reseller. You can also download the installer directly from the MySQL website via the link below:

https://dev.mysql.com/downloads/mysql/

When executing the installer, the first step is to accept the terms and click **Next**.



As we only need the Server functionality, in this manual we will only explain the installation and configuration of the MySQL server. Refer to the MySQL website when other options are selected as described in this manual. Now select **Server only** option and click **Next**

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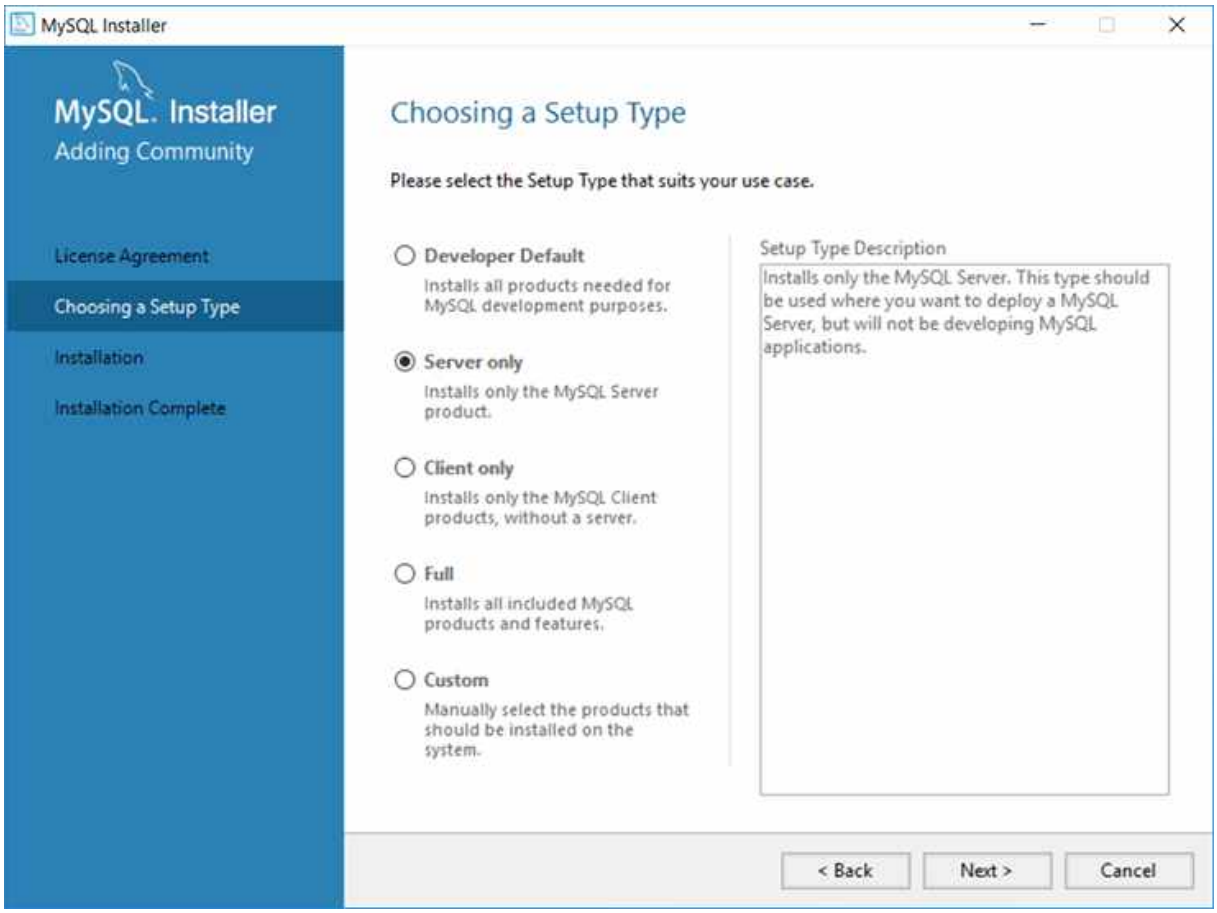

Just confirm what is going to be installed and Execute the installer by clicking **Execute**.

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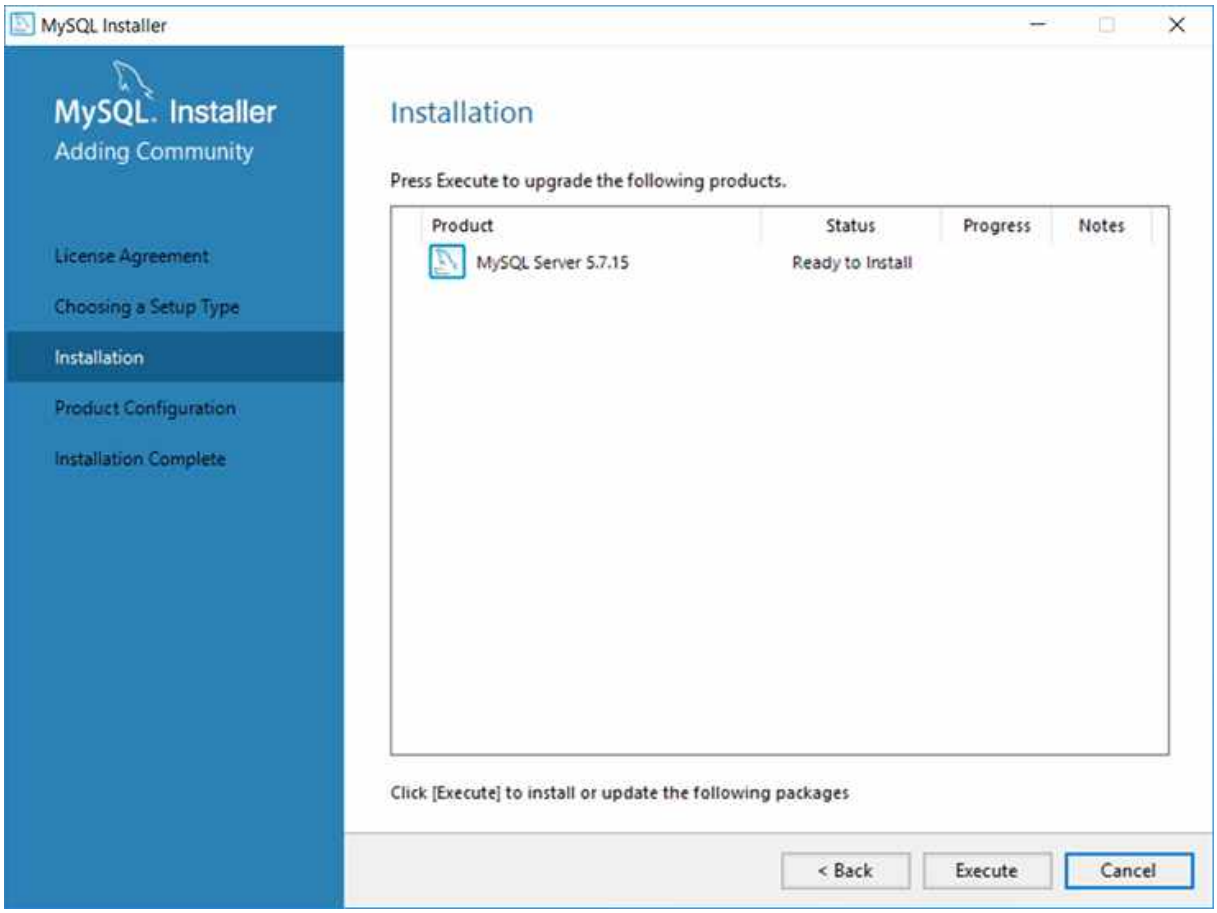

When the Server is installed on your system, the Complete message will be shown. Click **Next** to proceed to the Server configuration.

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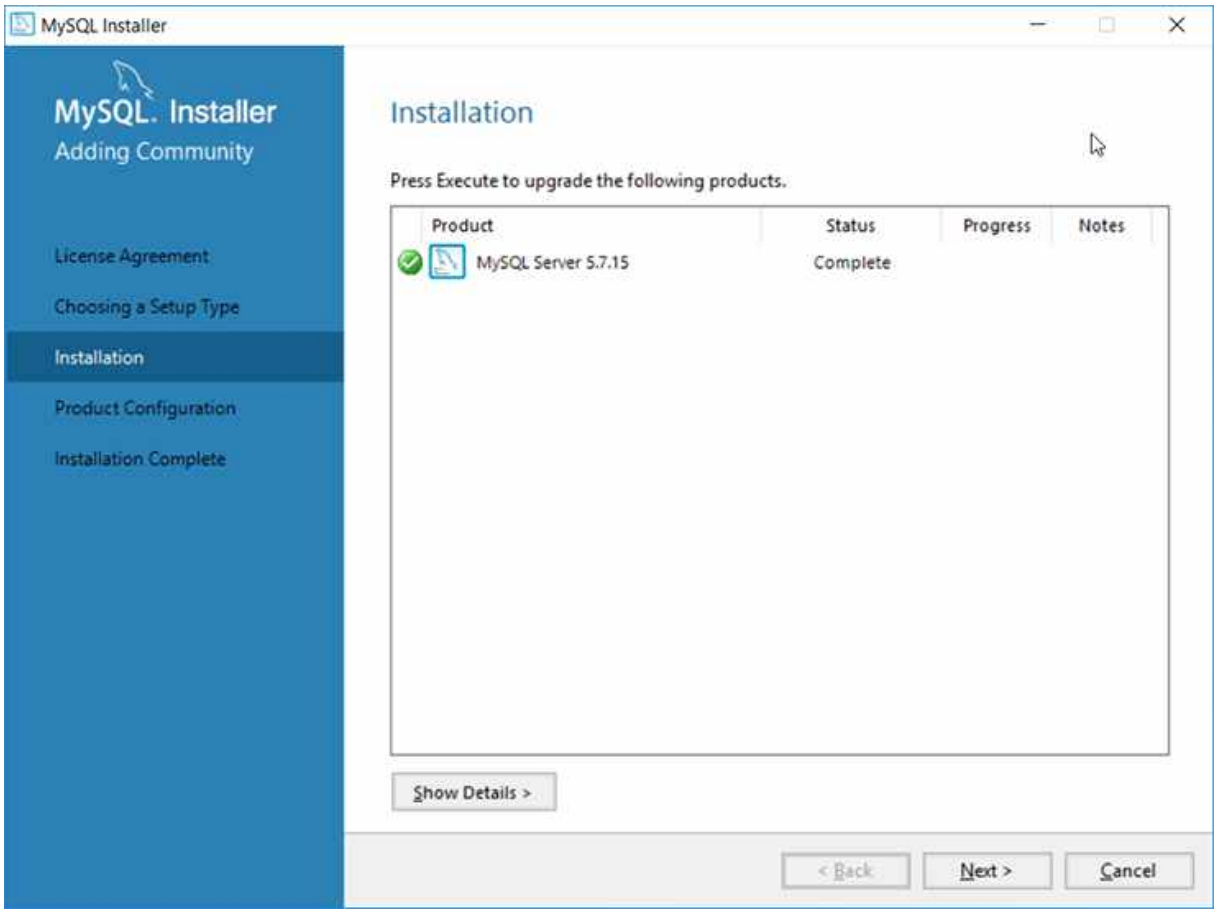

Click **Next** to step into the Product Configuration wizard.

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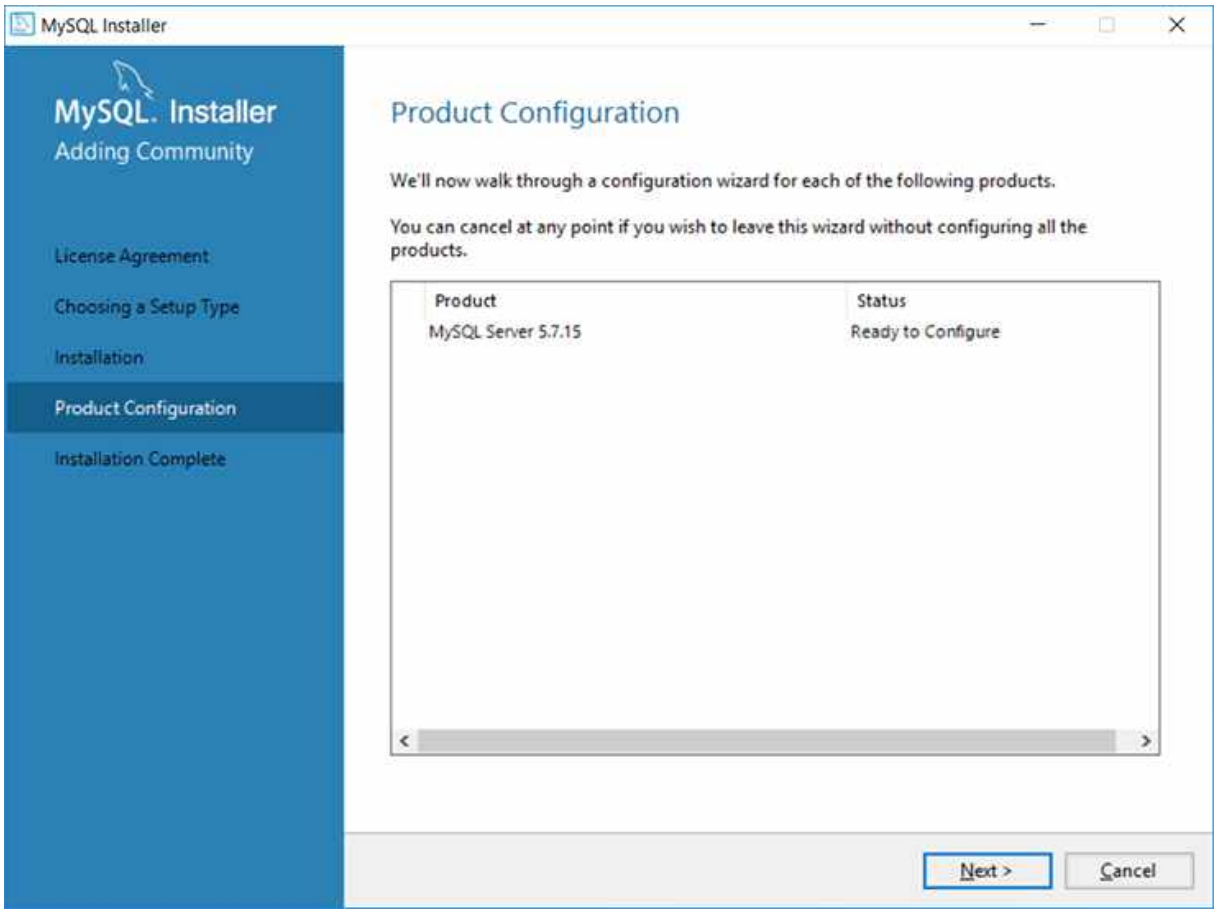

In this section we are providing specific information for the network. It will determine how your server will be accessible in your network.

For the Config Type we select "Server Machine". In the **Connectivity Settings** we enter the port number for the TCP/IP as well we indicate to have firewall network access. The port number is default to 3306. Please contact your system administrator if you need to change the default port number or enter the port number if you know what it needs to be.

You need to give your database a recognizable network name in the section **Named Pipe** and **Shared Memory.** Proceed to the **Accounts and Roles** by clicking **Next**.

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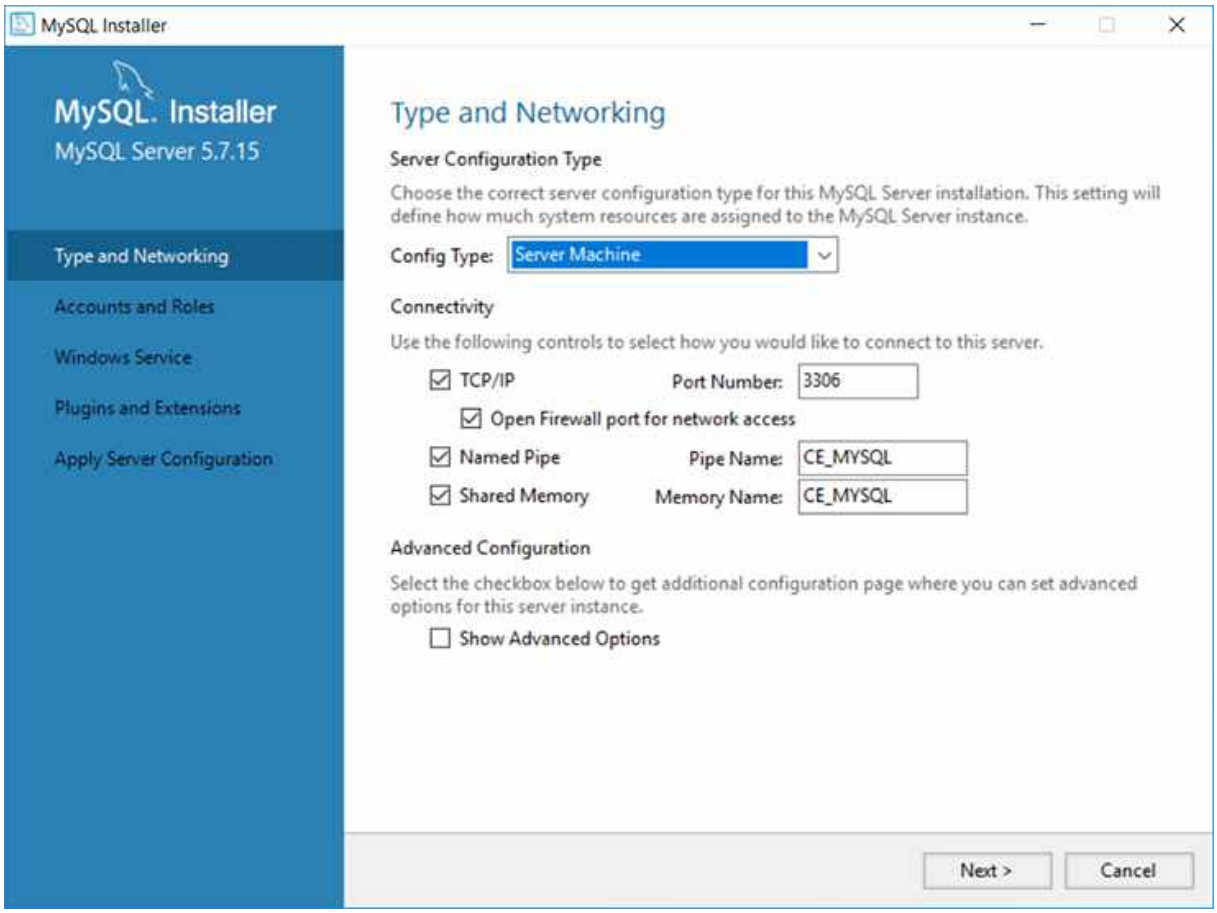

In the Accounts and Roles section we start with providing a Password for the Root Account of the database server. Make sure you store this password in a secure location and make it a strong password.

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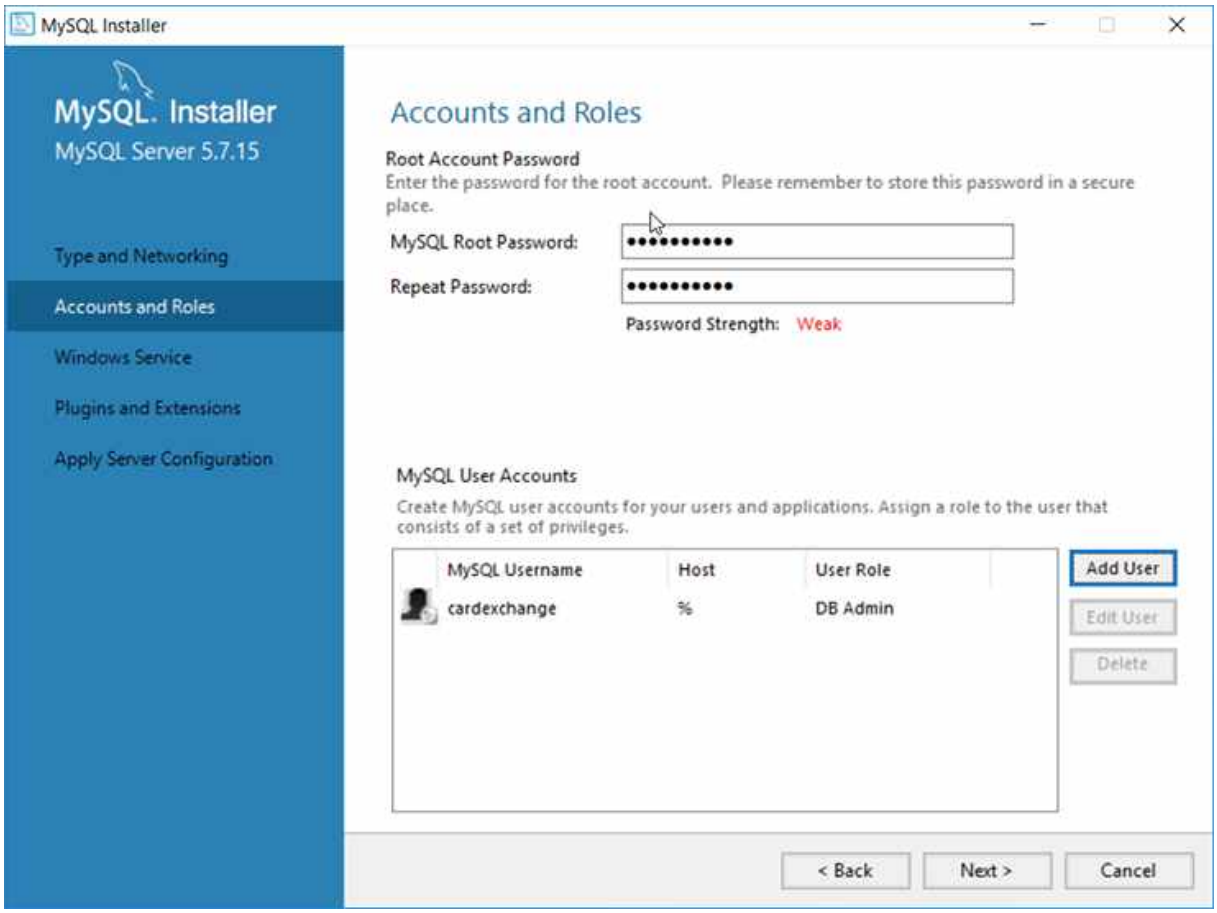

Next you need to add a user account to the database server by clicking **Add User**. In the MySQL User Details window you provide the username and the password. Set the role to DB admin and leave the Host as default and click on OK to confirm the User and press Next to proceed.

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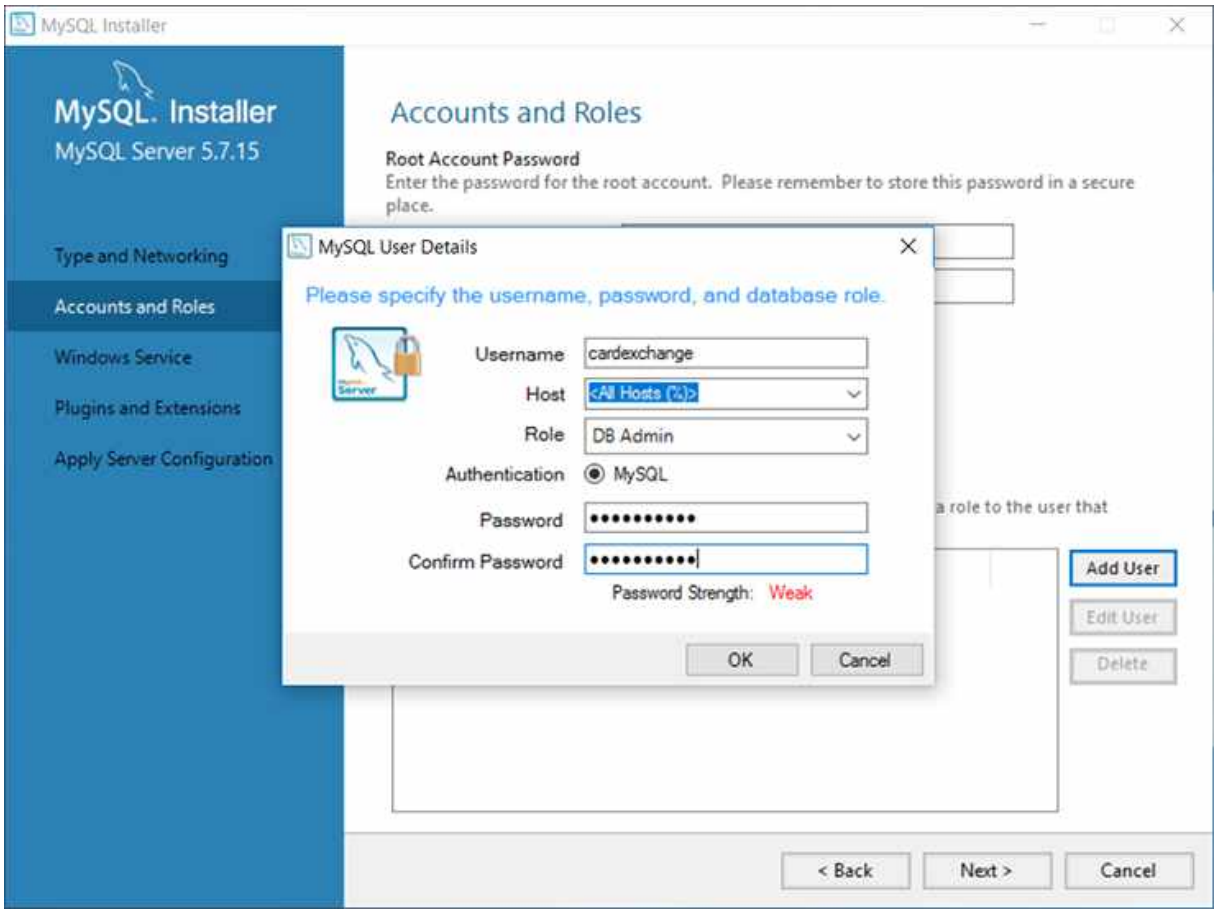

In the Windows Service section of the installation we select that the MySQL server will act as a service and that we want to start this service at system startup. You can change the Windows Service Name but it is not needed for the purpose of CardExchange® Visitor installation. We advice to have the service running as a Standard System Account. When done, click on **Next** to Proceed.

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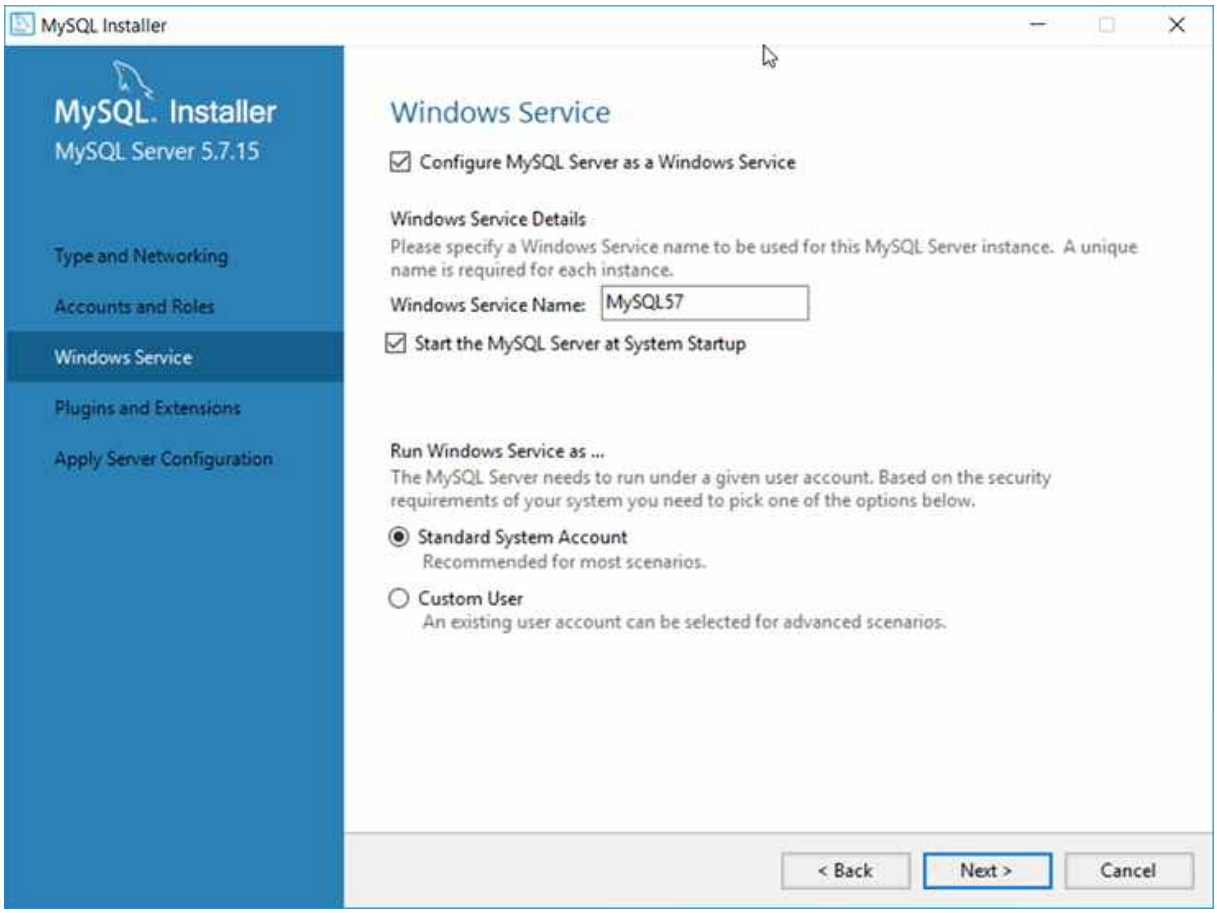

In the Plugins and Extension section, nothing has to be selected or changed for the use of the database server with CardExchange® Visitor so click **Next** to proceed.

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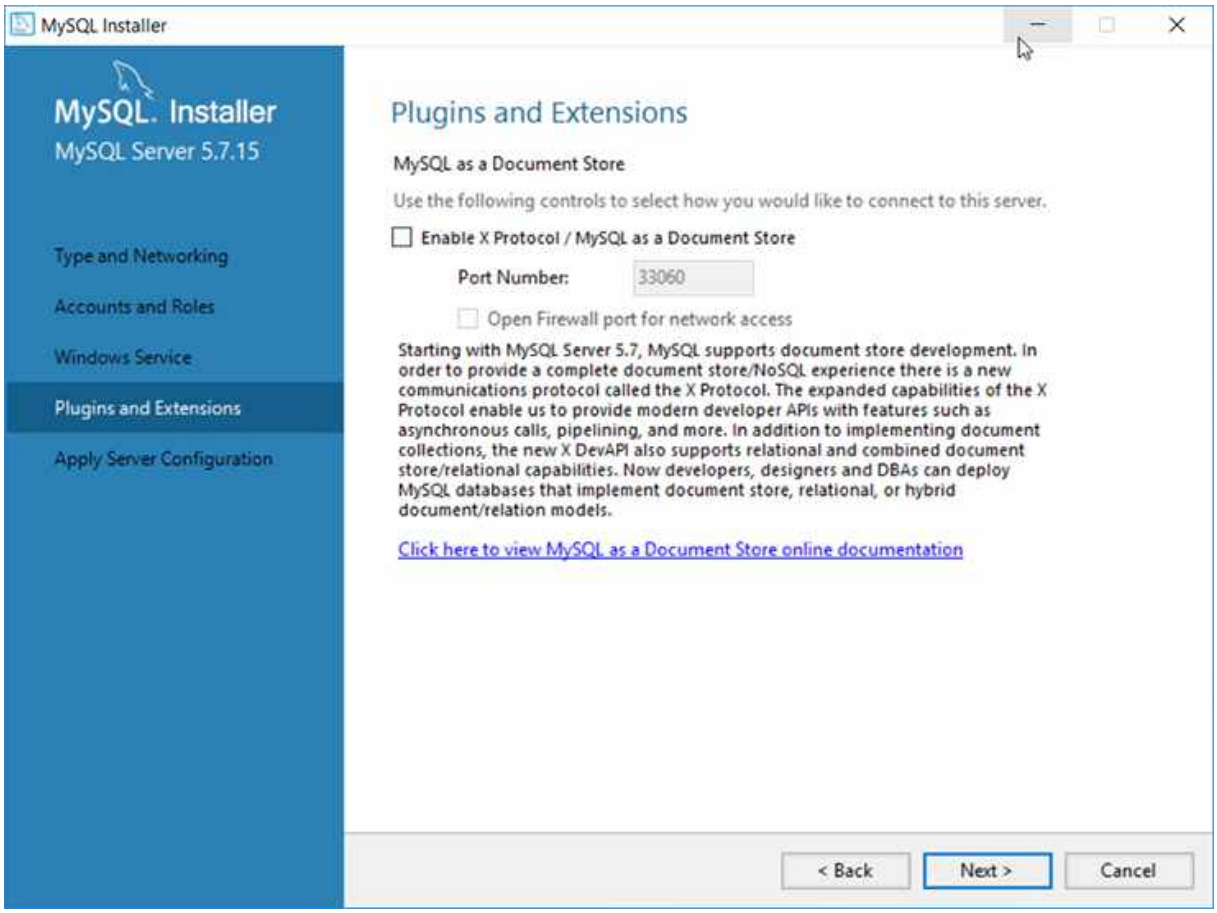

After all the wizard pages are applied, we need to execute this configuration so click **Execute** to proceed.

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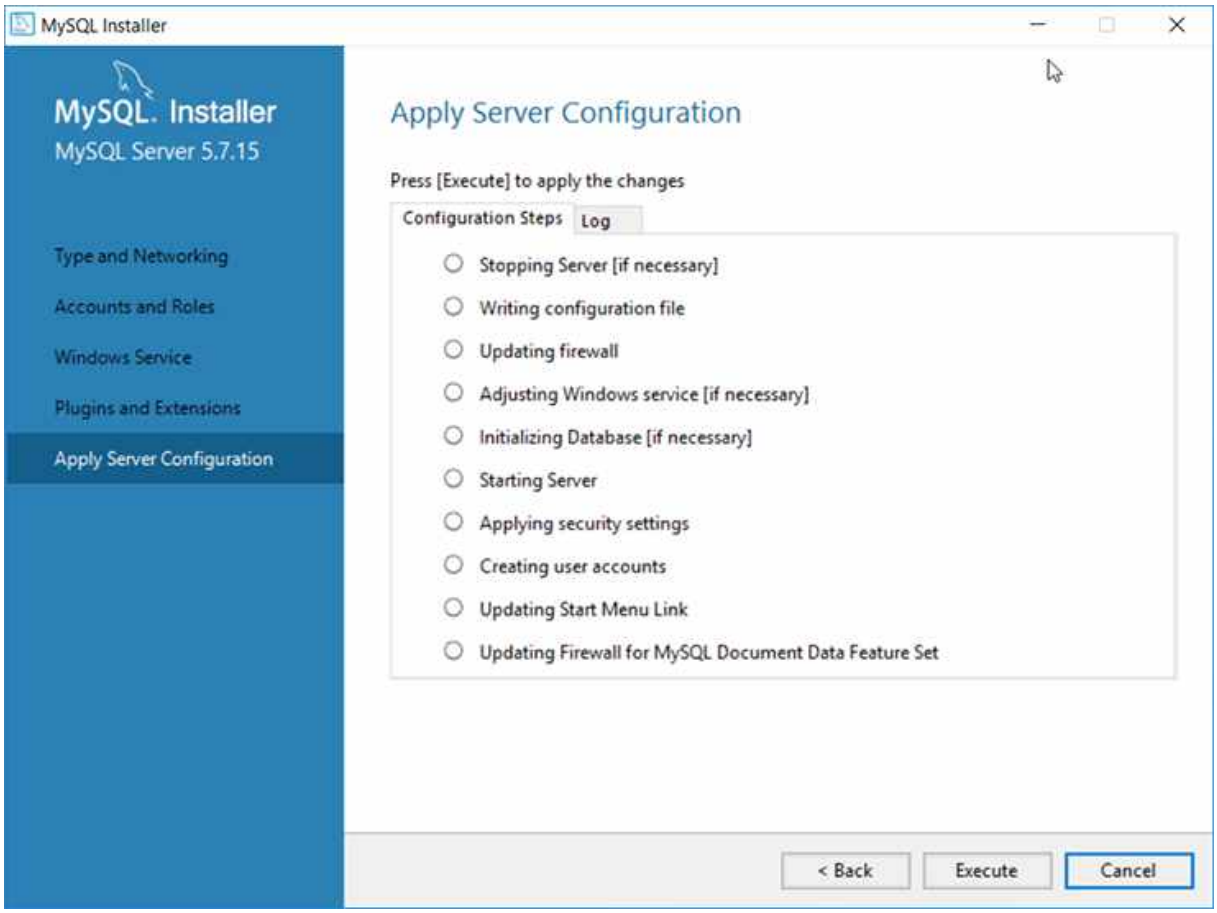

During this process, the wizard will show all the processes being executed.

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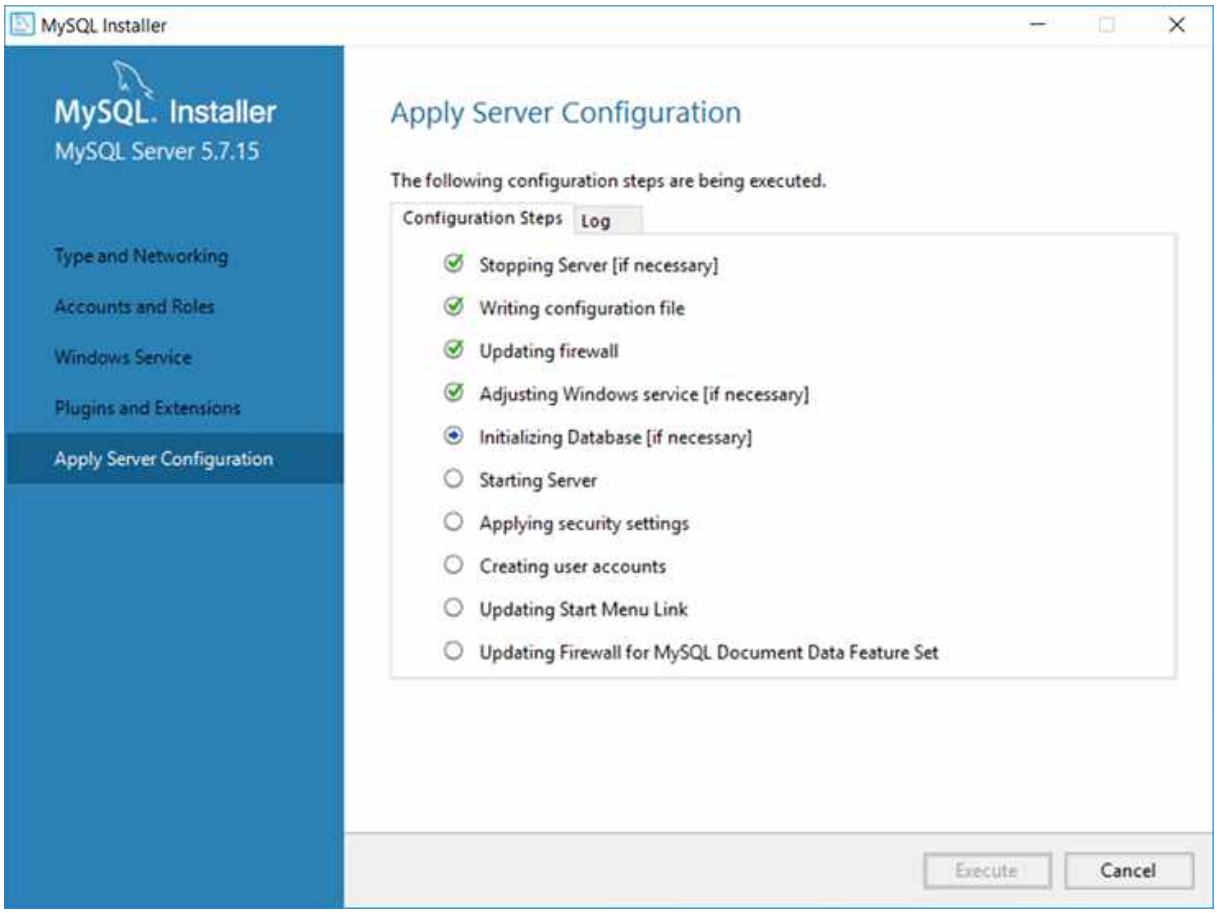

And when all settings are executed, you can click Finish to proceed to the last step of the installation.

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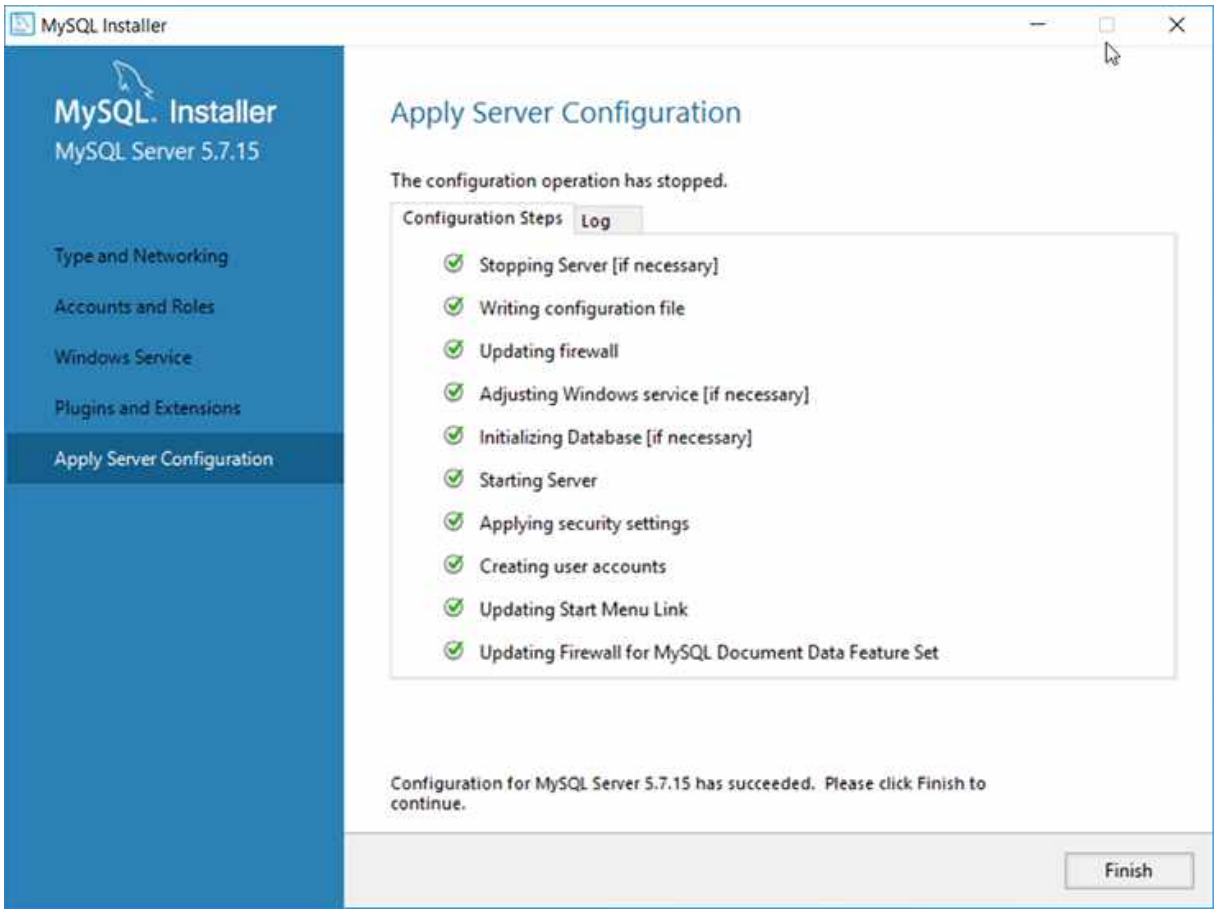

Back in the Product Configuration section, you need to click **Next** to proceed.

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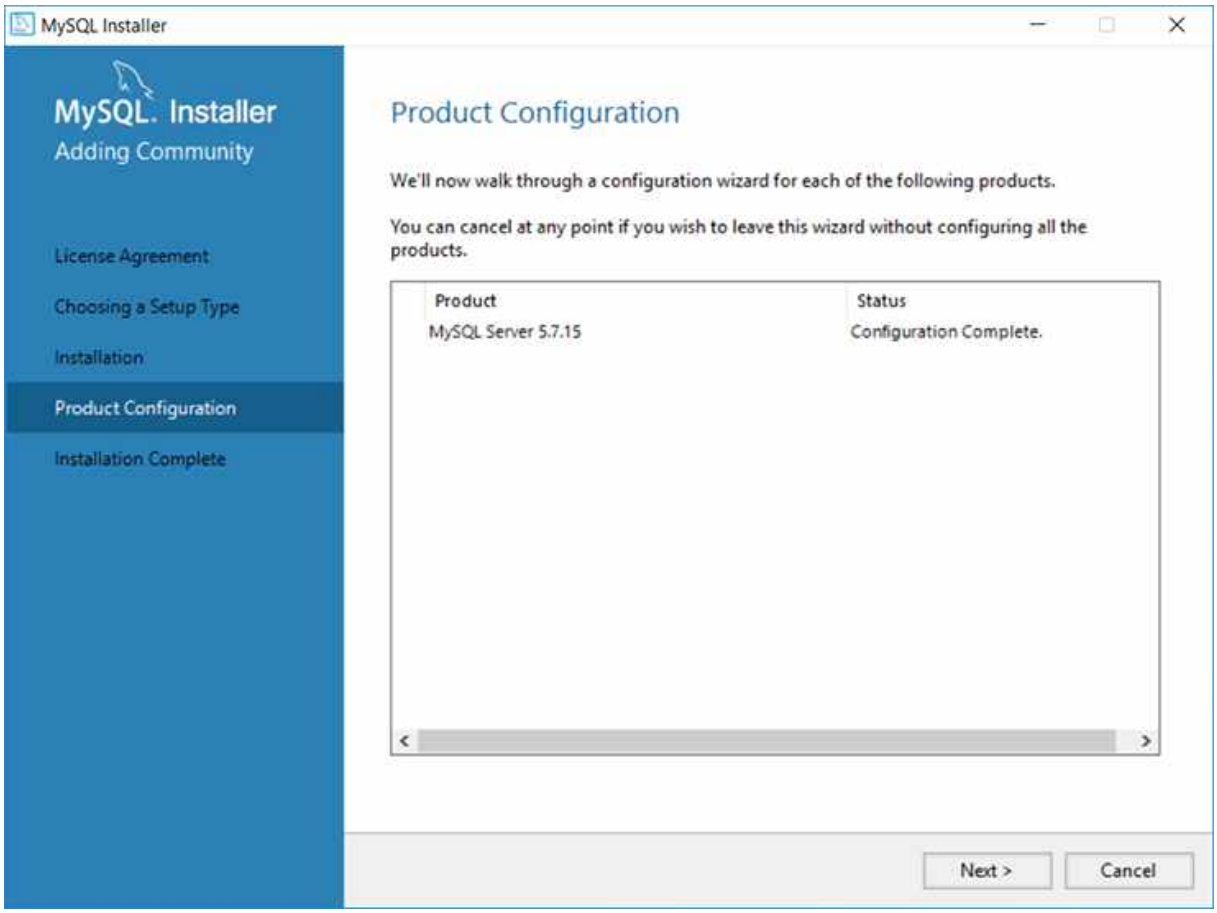

And click Finish to end and close the installation.

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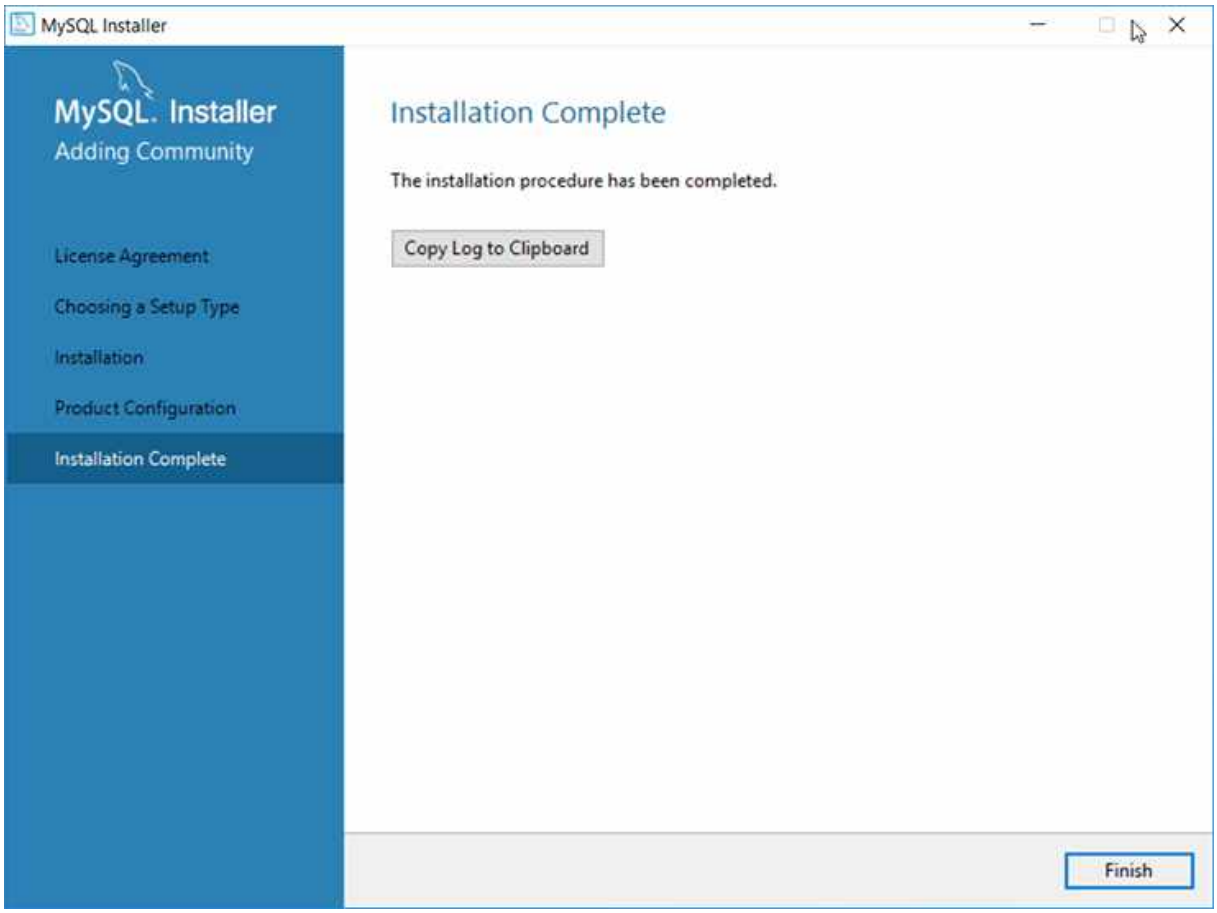

When the installation of the database server is successful, you can proceed to the setup of the database 103.

4.1.1.2 Setup MySQL Database

When you have installed the MySQL Server or if you already had a MySQL Server running, it is now time to prepare the database for CardExchange® Visitor. The creation of the database is very basic as we only have create the database and 1 (one) table, the Migrations table. As soon as this table is available and you start CardExchange® Visitor for the first time, it will then create the complete database needed for the application.

Below is the complete script but we have included step-by-step instructions below as well:

```
CREATE DATABASE `cegateway`;
USE `cegateway`;
CREATE TABLE `tblsystem_migrations` (
  `ID` int(11) NOT NULL AUTO_INCREMENT,
  `Version` int(11) NOT NULL,
  `MigrationDate` datetime NOT NULL,
```

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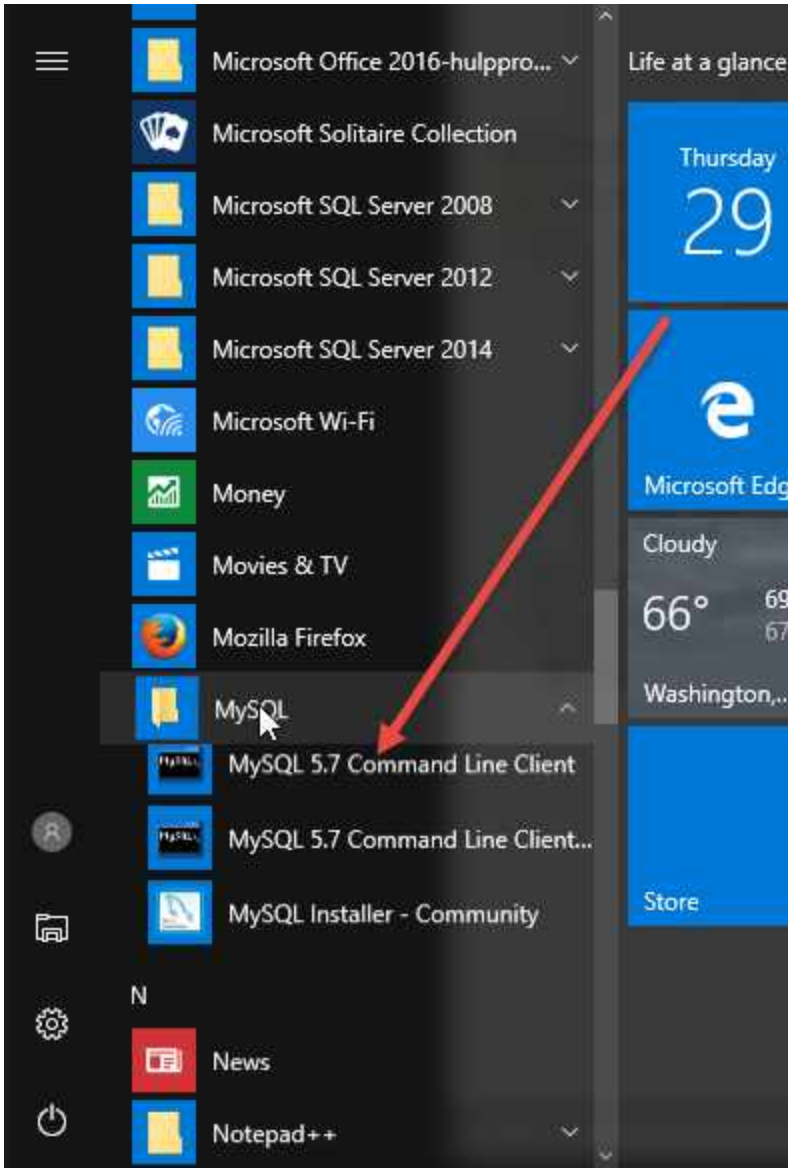
```
  PRIMARY KEY (`ID`)
) ENGINE=InnoDB AUTO_INCREMENT=2 DEFAULT CHARSET=utf8;
```

To setup a database with MySQL, we will have to do some specific command line commands via the MySQL Command Line Client. To start the client, browse your start menu and look for the MySQL folder and select MySQL 5.7 Command Line Client.



The first thing we need to enter when the command line client starts is ROOT password so enter the password and hit Enter.

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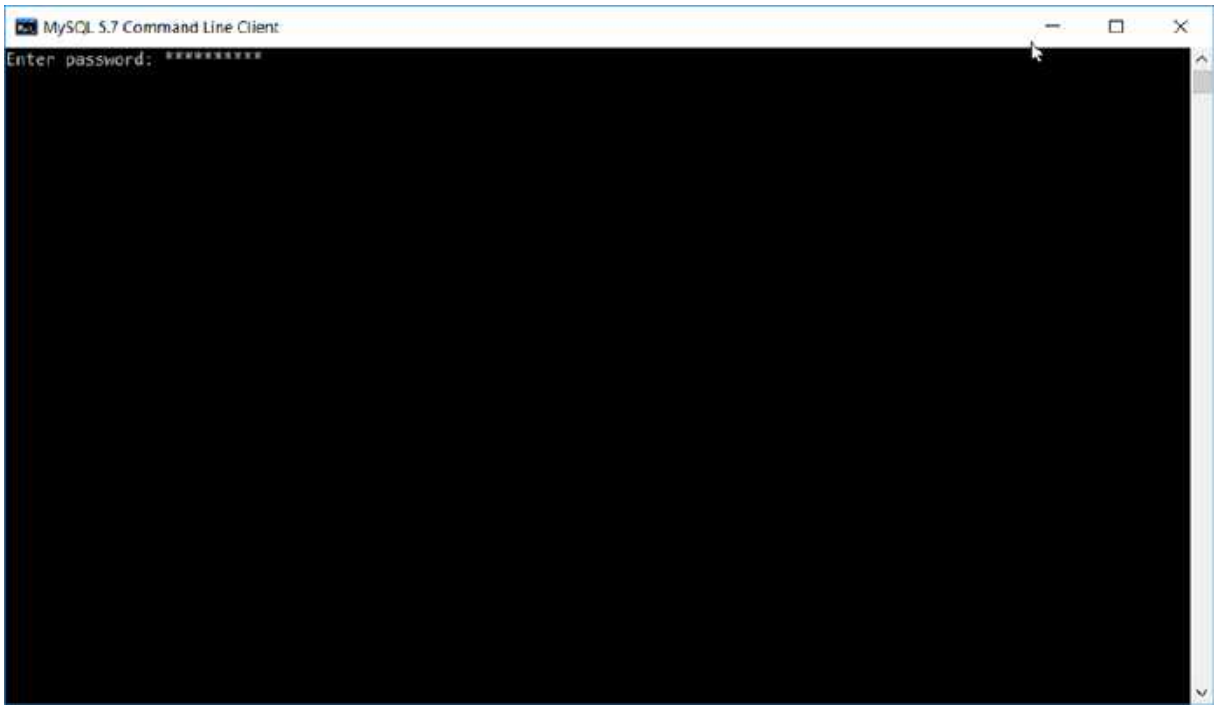
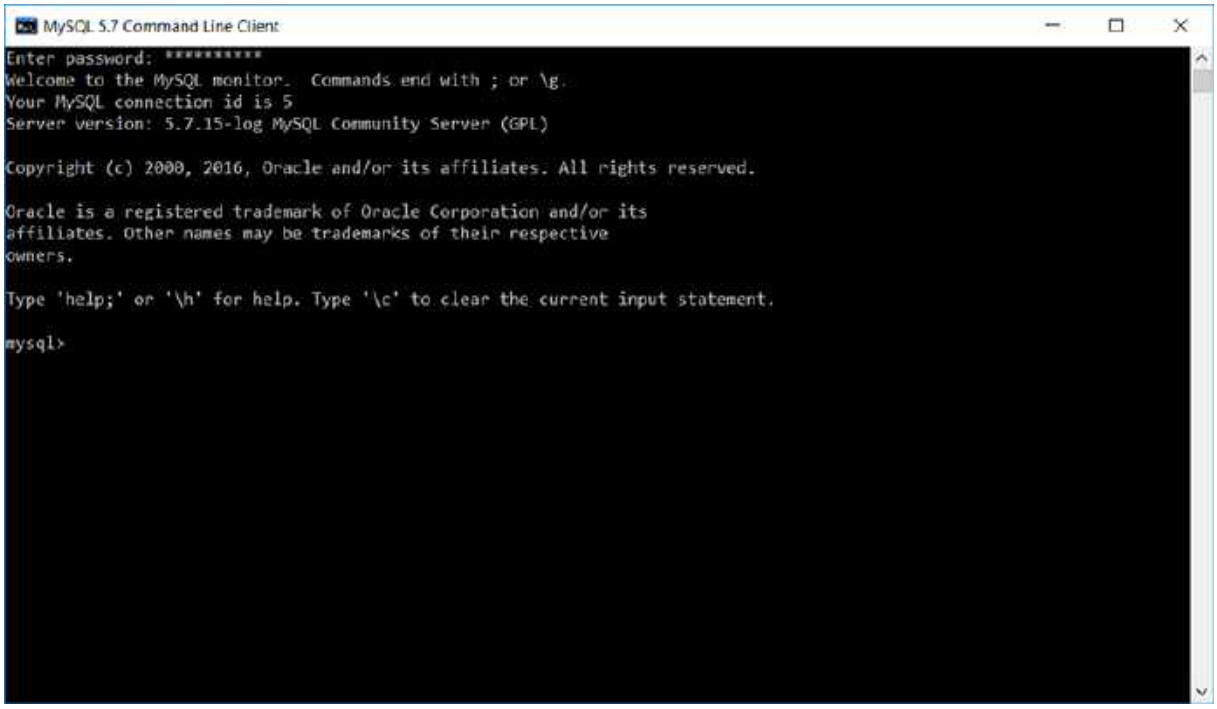


After the password is entered and accepted successfully, the client is ready for commands.



First we have to create the database so enter the exact command below (copy and paste is adviced) and hit Enter:

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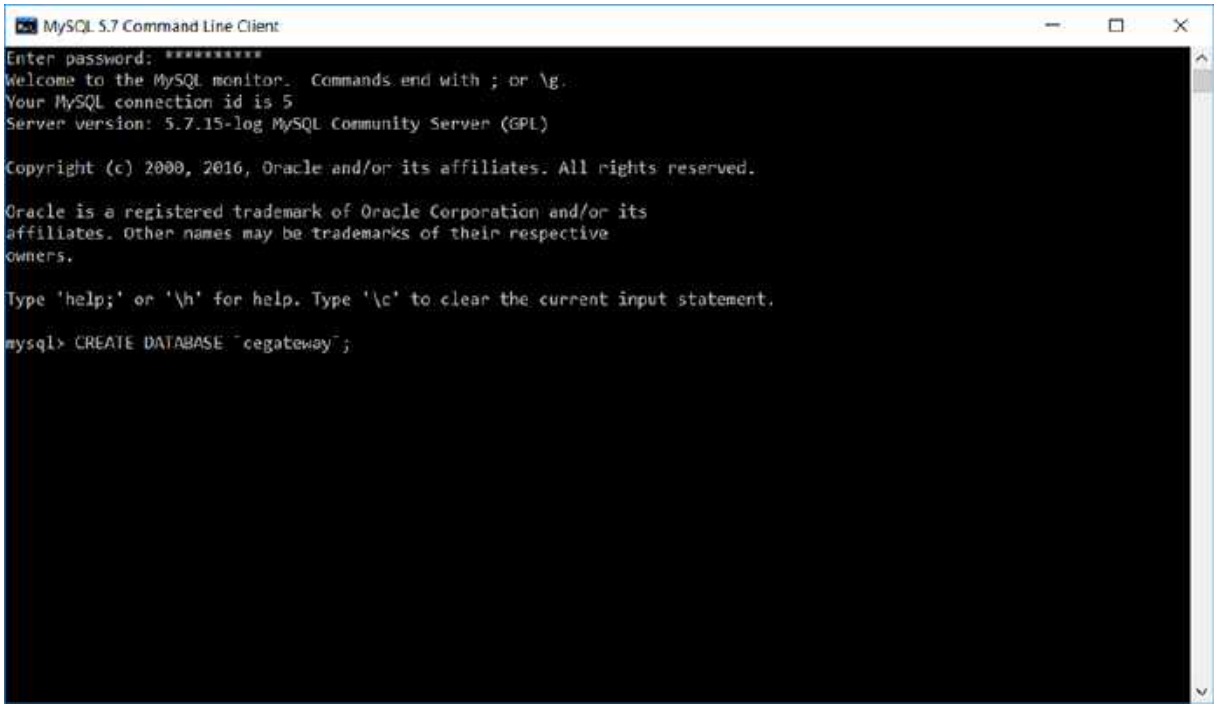
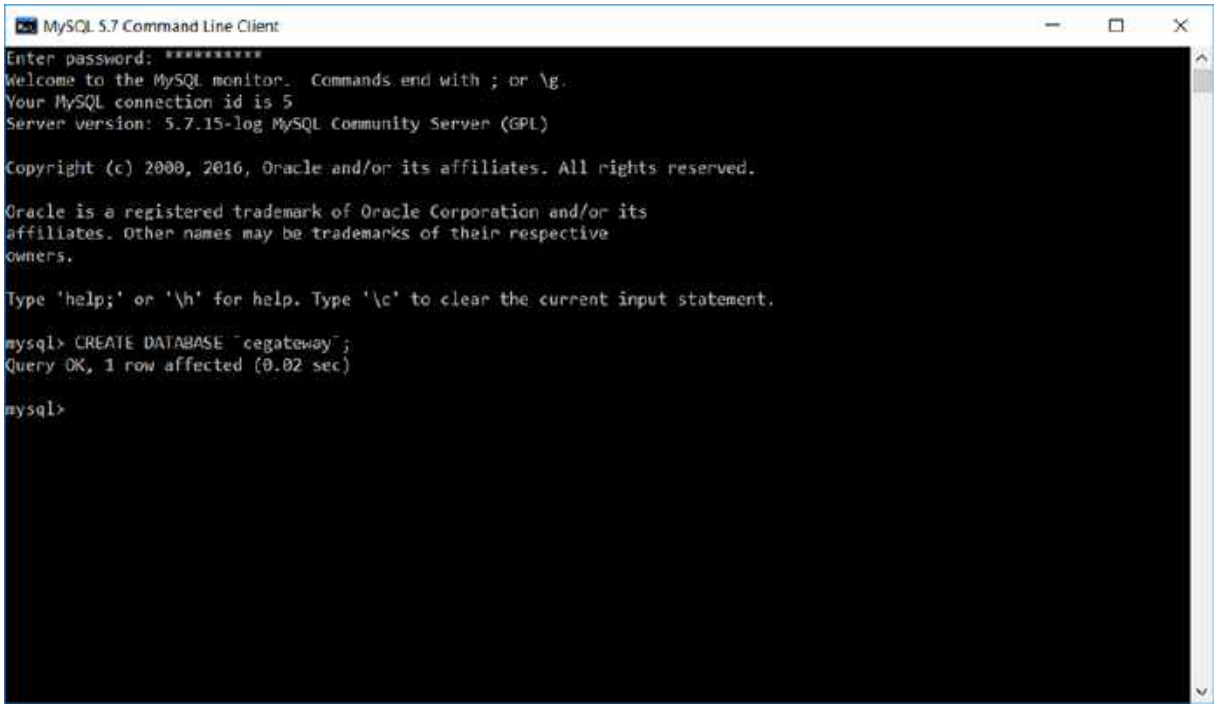
CREATE DATABASE `cegateway`;



When successful, the query should indicate OK, 1 row should be affected.



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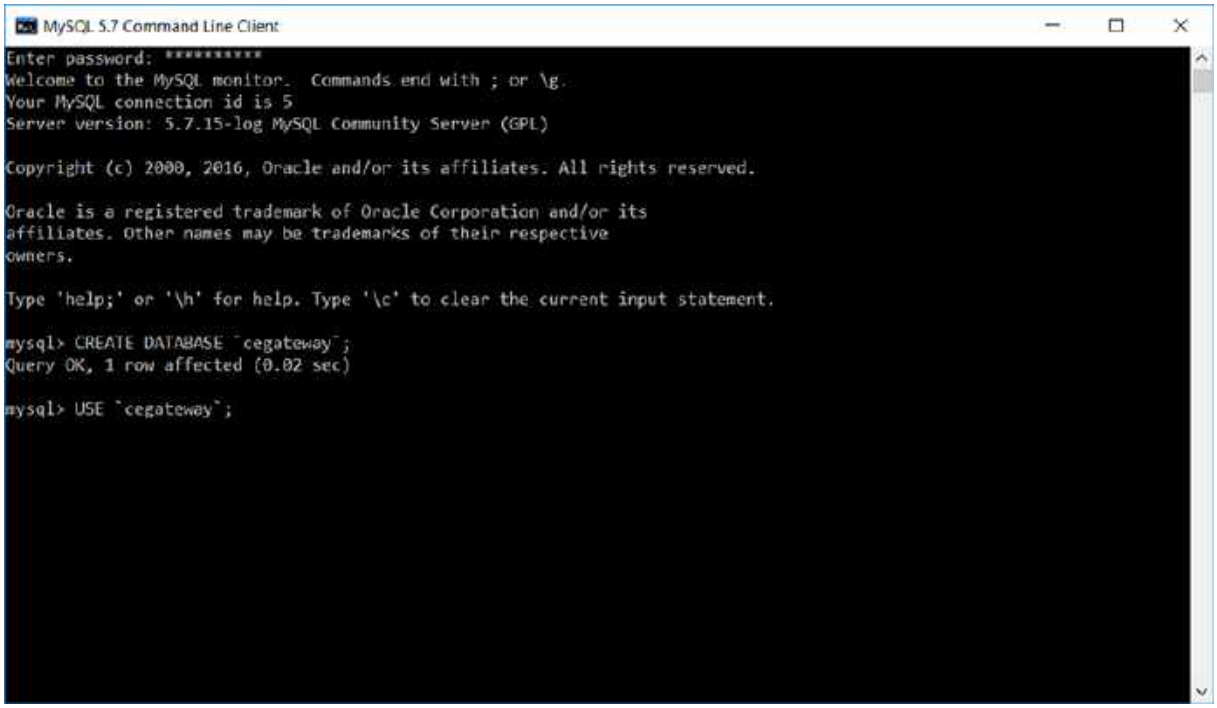
Now we need to tell the system to use the created database for creating the table later. Enter or copy and paste the command below and hit Enter:

```
USE `cegateway`;
```



When successful, it will indicate that the Database has changed. Now we can create the migration table.

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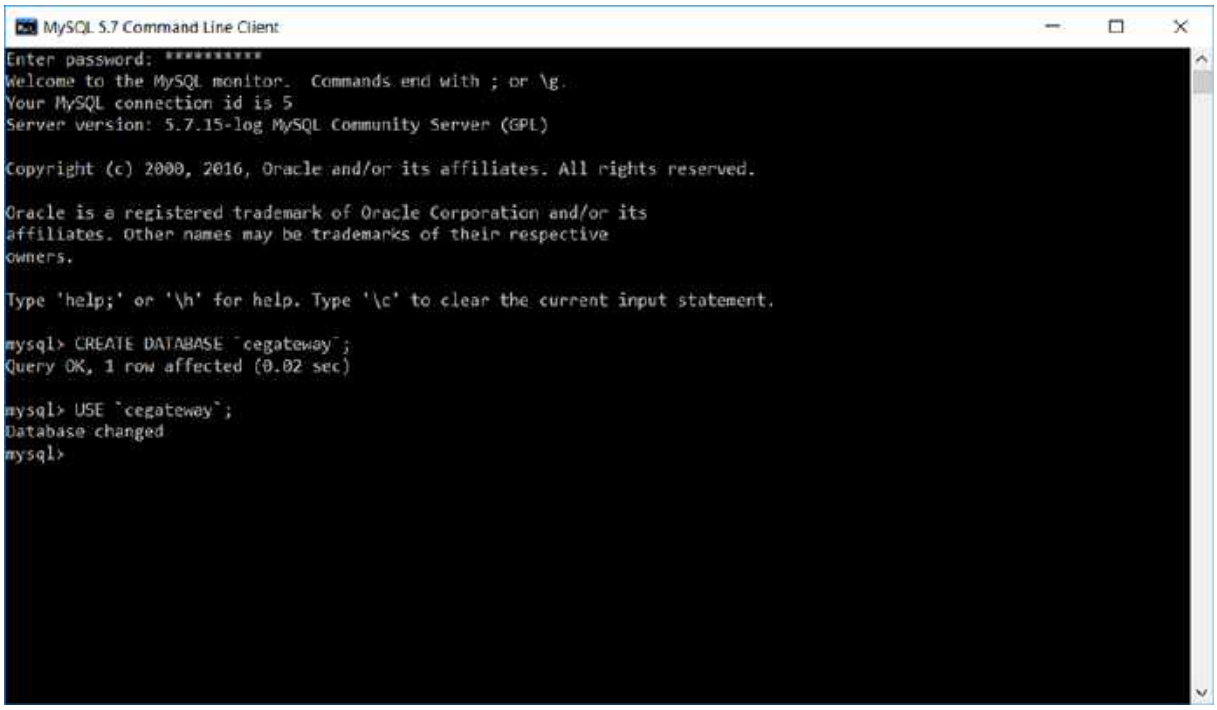

To create the migrations table, please enter (copy and paste advised) the command below and hit Enter:

```
CREATE TABLE `tblsystem_migrations` (
  `ID` int(11) NOT NULL AUTO_INCREMENT,
  `Version` int(11) NOT NULL,
  `MigrationDate` datetime NOT NULL,
  PRIMARY KEY (`ID`)
) ENGINE=InnoDB AUTO_INCREMENT=2 DEFAULT CHARSET=utf8;
```

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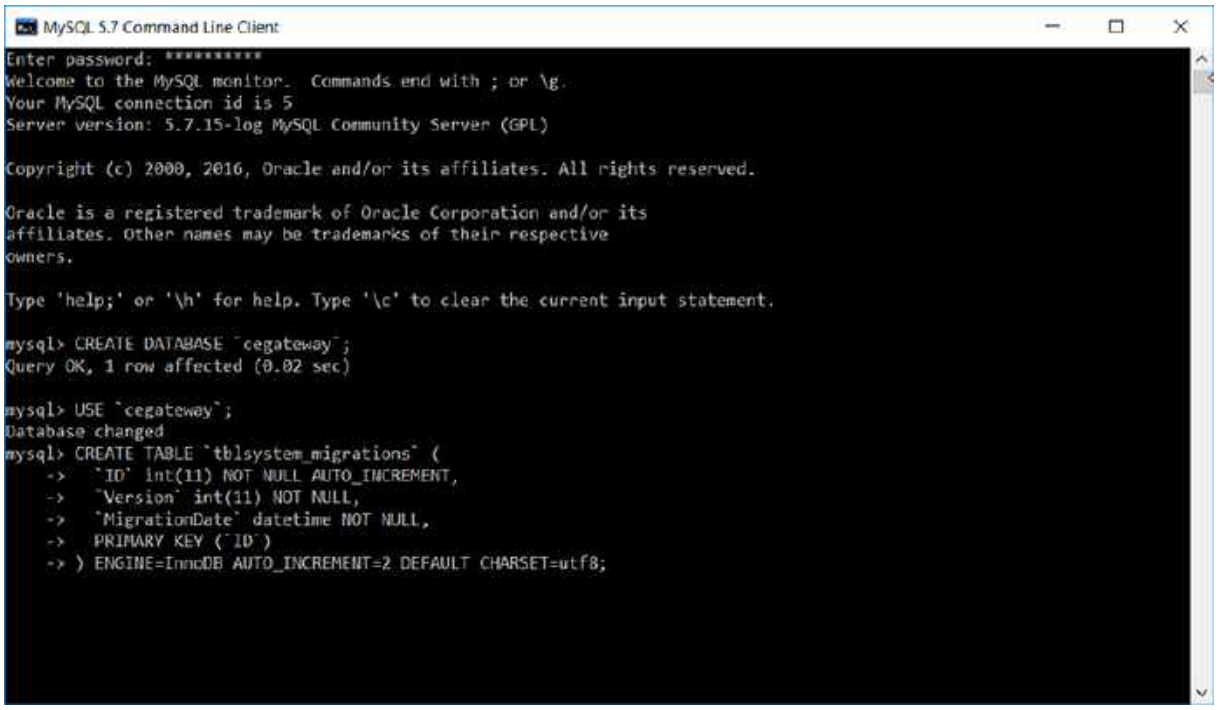
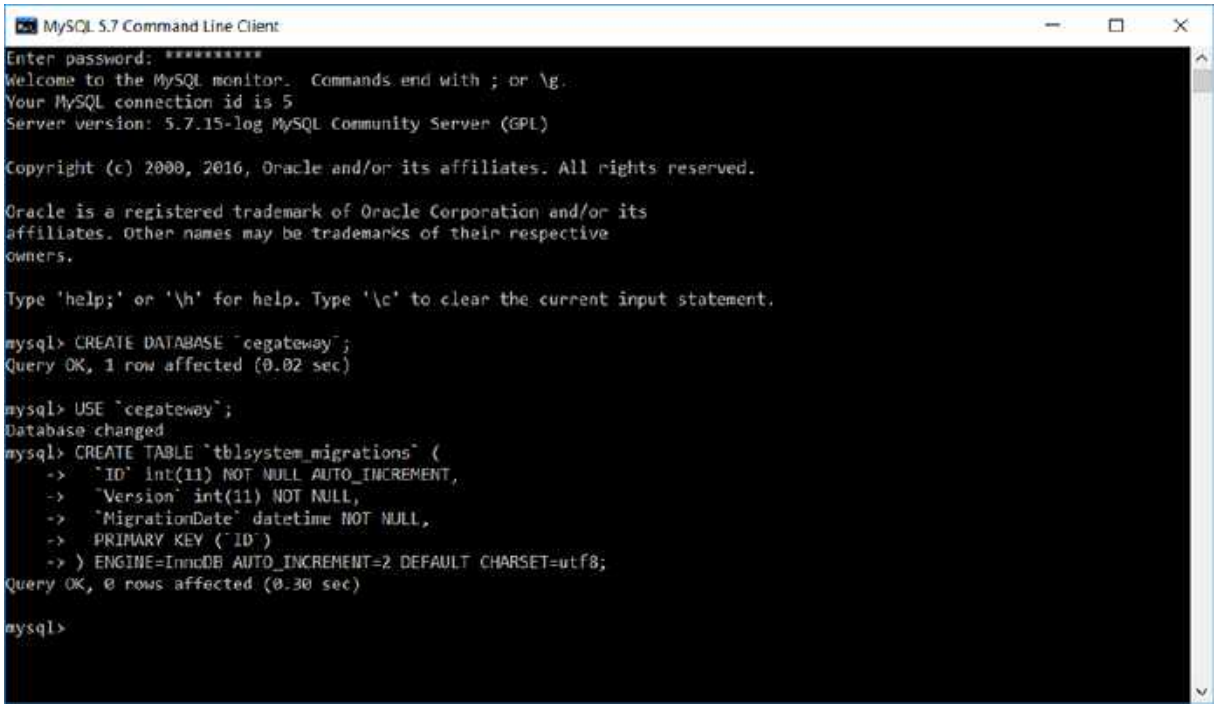


When successful, the query will indicate OK and 0 (zero) rows are affected.



You have now successfully created the database and the migration table. When you run CardExchange® Visitor for the first time, it will create the table structure to be used, also when performing updates we may change the structure within a future release. If this is

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done then a migration table keep track of any changes in future releases of the database and will be fully self maintaining.

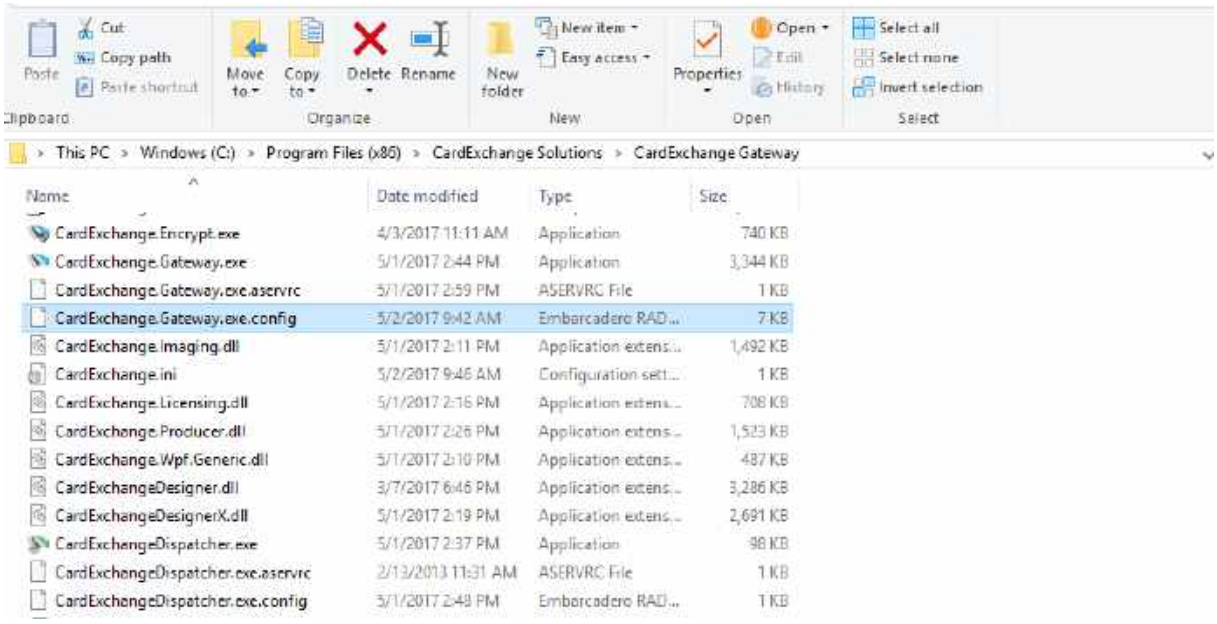
The only think left to do is the configuration of the client(s). To do so, please refer to the specific section of this help file for the configuration of the Client 110 or the KIOSK 123.

4.1.1.3 Configure MySQL Database Connection

To use the Client with a MySQL database, each Client will have to be configured for that. The location of the database is set in the CardExchange® Visitor Configuration file.

This CardExchange.Gateway.exe.config file is located in the installation directory you selected during the installation, typically this would be:

C:\Program Files (x86)\CardExchange Solutions\CardExchange Gateway\ by default.



You can open the CardExchange.Gateway.exe.config file using the CardExchange.Config.exe utility in the install folder.
If you drag the config file onto the config utility it will automatically open in it.

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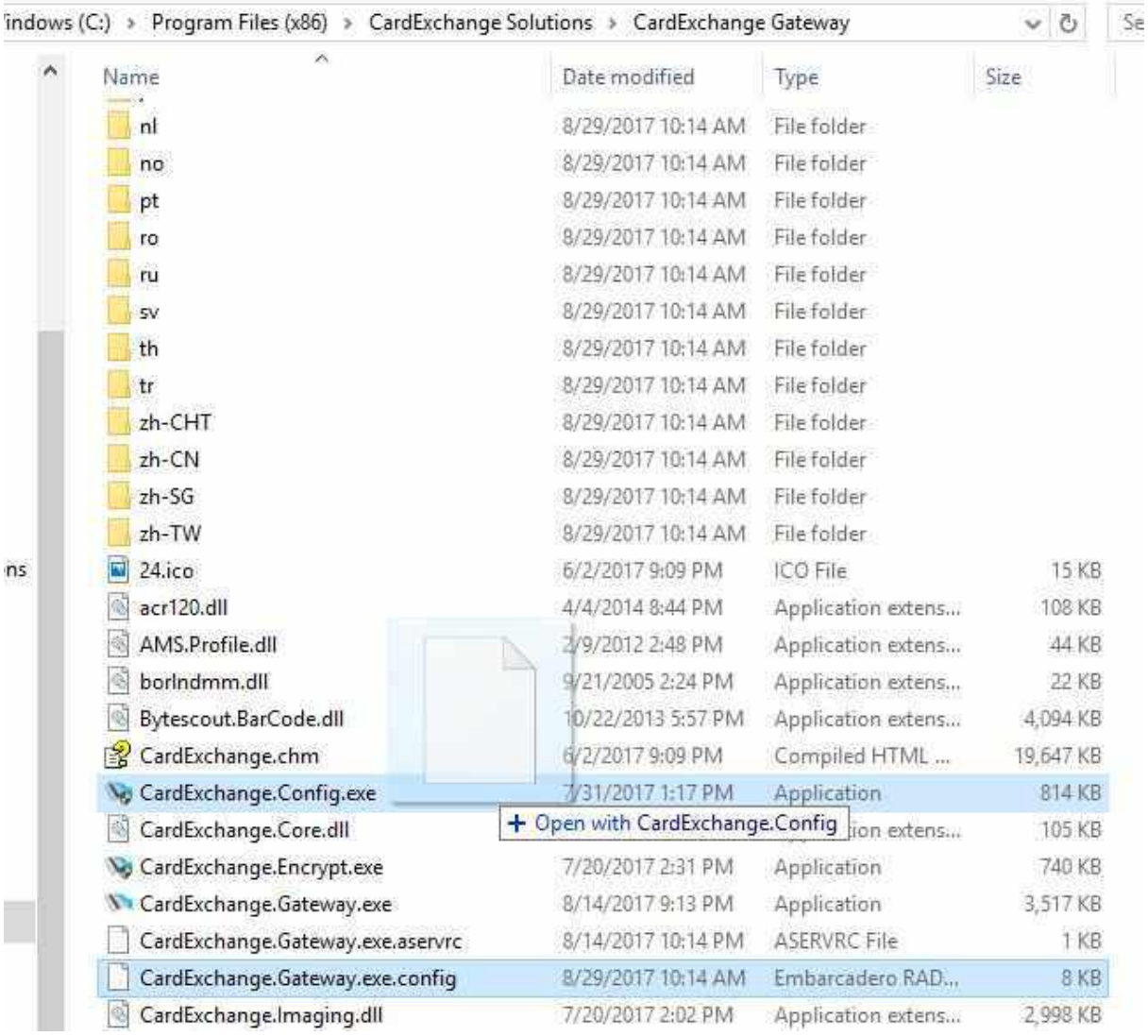

Here you can now change the server/login credentials under the connection strings tab.

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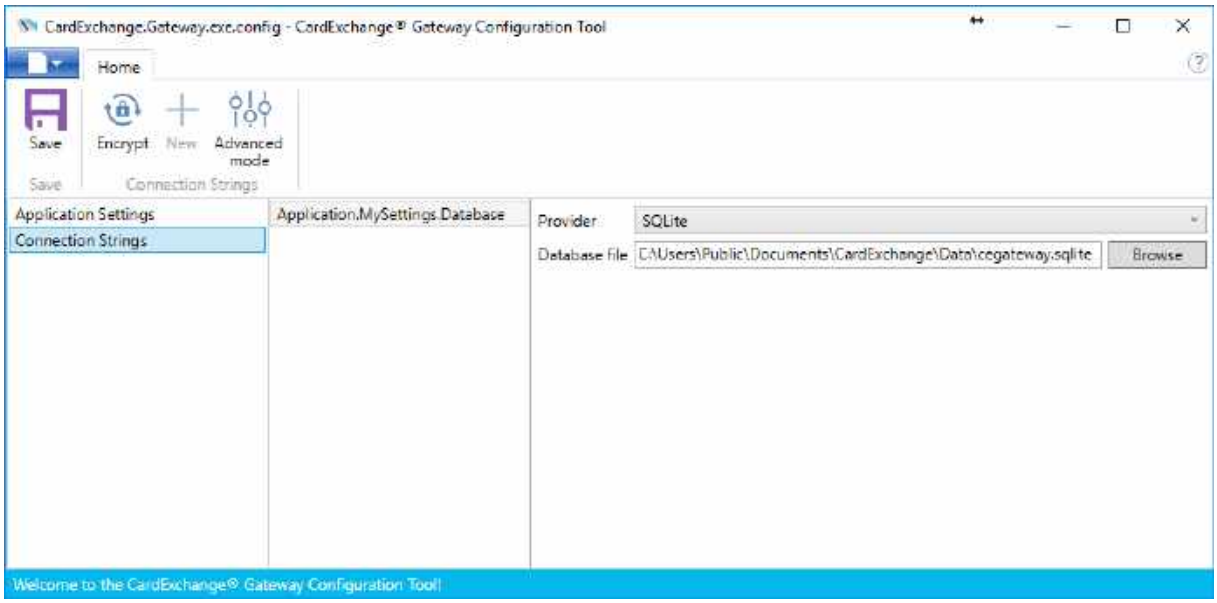

Now save the configuration file and start CardExchange® Visitor. When CardExchange® Visitor is starting, it will now use the MySQL database you have just created.

4.1.1.4 Storing Images

If you are using a MySql database and storing images greater than 1MB in size, you will need to increase the MySql variable "max_allowed_packet" value from 1MB, which is the default value, to something bigger like 5MB.

Some instructions on changing this value can be found on the MySQL website here: https://dev.mysql.com/doc/refman/5.5/en/packet-too-large.html

This is because some images such as photos can be bigger than 1MB and MySQL is defined to only accept 1MB BLOB values by default.

4.1.2 Using SQL Database Server

This section of the help file will explain how to setup and configure the SQL Server database for use with CardExchange® Visitor.
The installation of SQL Server is beyond the scope of this installation manual and will not be covered, if you need help with this please consult your system administrator.

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Note: Connection to MySQL and SQL Server databases is only possible with CardExchange® Visitor Business edition.

4.1.2.1 Setup SQL Database

When you have installed SQL Server or if you already had a SQL Server running, it is now time to prepare the database for CardExchange® Visitor. The creation of the database is very basic as we only have create the database and 1 (one) table, the Migrations table. As soon as this table is available and you start CardExchange® Visitor for the first time, it will then create the complete database needed for the application.

Below is the script to create the database and the migrations table:

```
CREATE DATABASE `cegateway`;
USE cegateway
GO

CREATE TABLE "tblSystem_Migrations"(
  [ID] INT PRIMARY KEY IDENTITY(1,1),
  [Version] INT NOT NULL,
  [MigrationDate] DATETIME NOT NULL
)
```

4.1.2.2 Configure SQL Server Database Connection

To use the Client with a SQL Server database, each Client will have to be configured for that. The location of the database is set in the CardExchange® Visitor Configuration file.

This CardExchange.Gateway.exe.config file is located in the installation directory you selected during the installation, typically this would be:

C:\Program Files (x86)\CardExchange Solutions\CardExchange Gateway\ by default.

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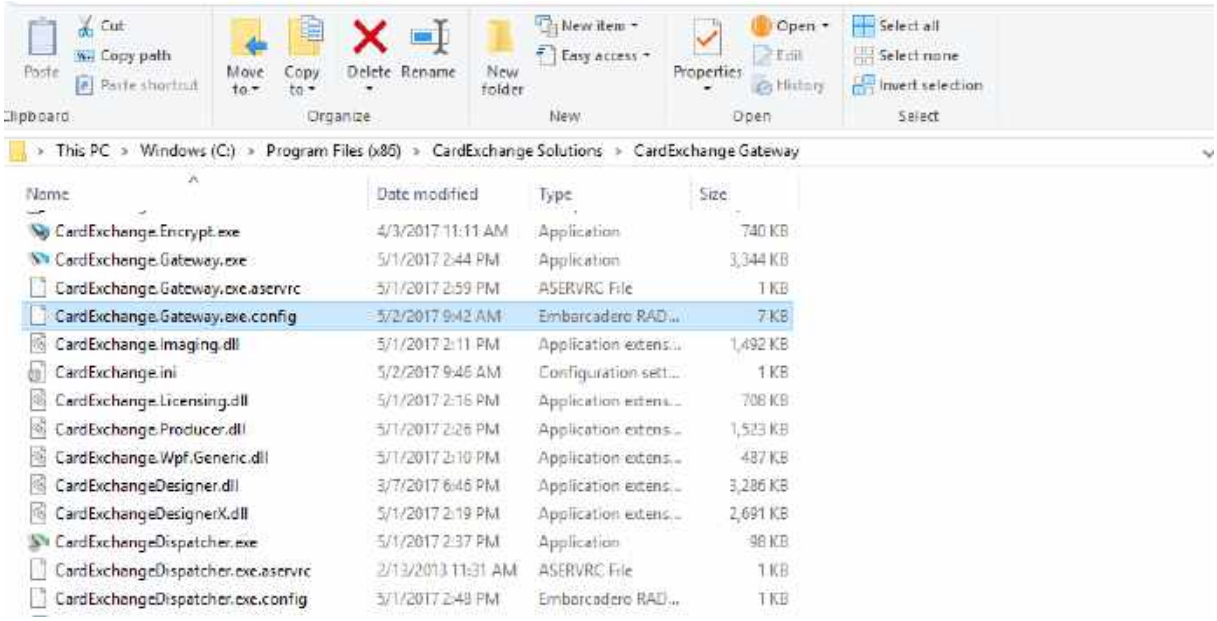

You can open the CardExchange.Gateway.exe.config file using the CardExchange.Config.exe utility in the install folder.
If you drag the config file onto the config utility it will automatically open in it.

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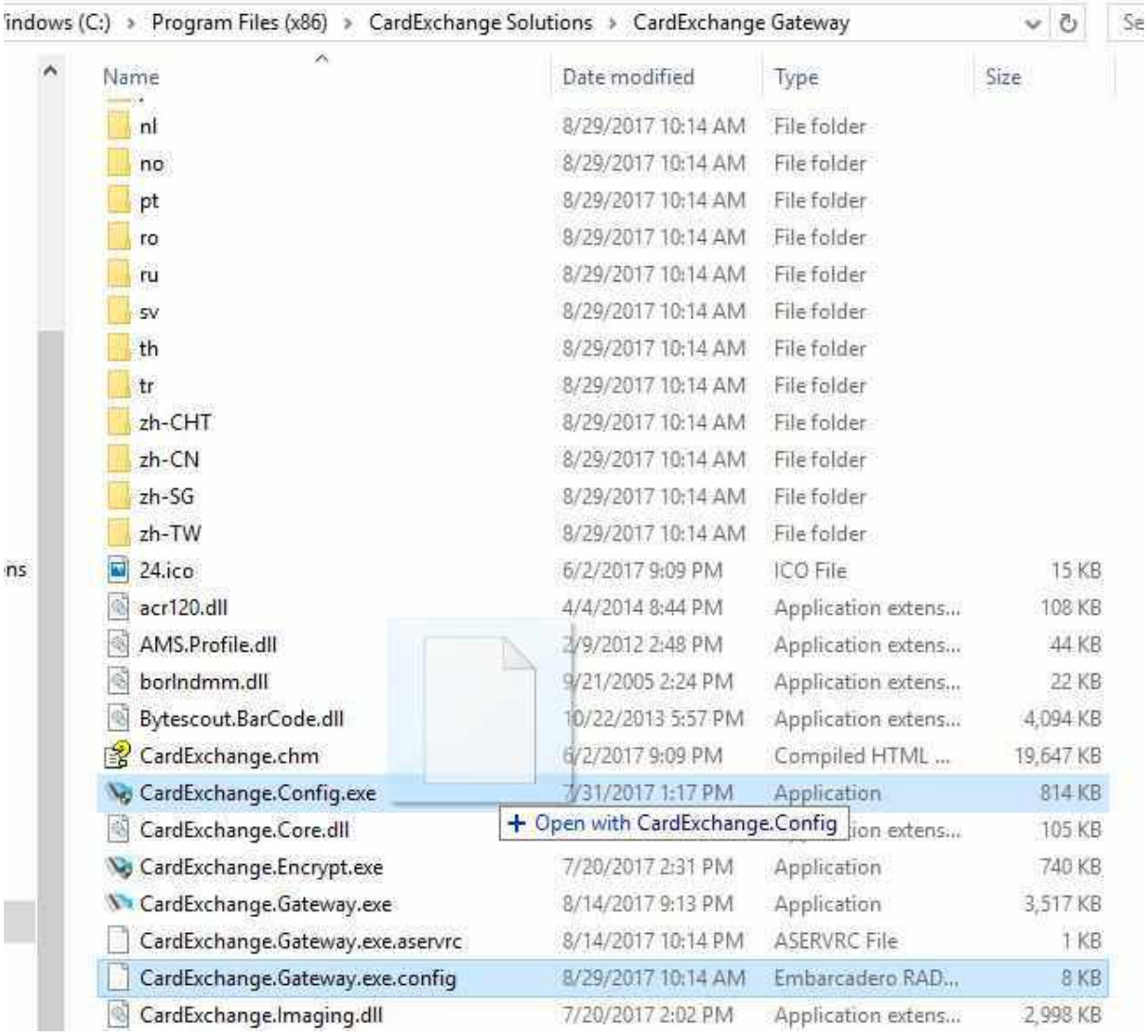

Here you can now change the server/login credentials under the connection strings tab.

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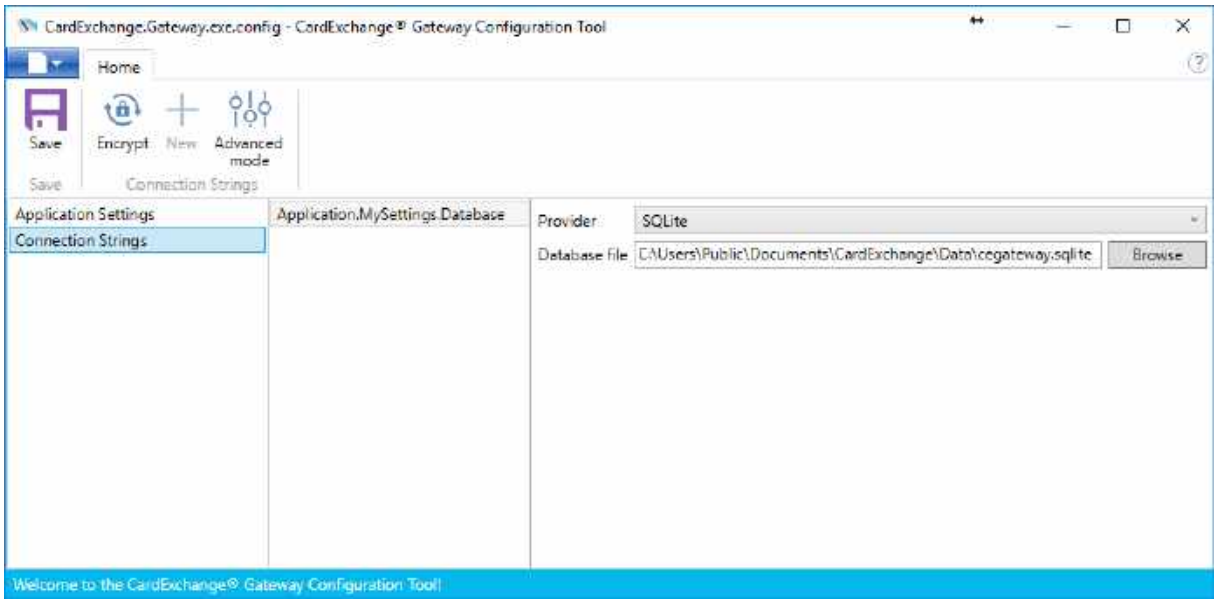

Now save the configuration file and start CardExchange® Visitor. When CardExchange® Visitor is starting, it will now use the SQL Server database you have just created.

4.1.3 Configure Shared Folders

CardExchange® Visitor allows multiple installations to share the same configuration, which in that case will likely be located on a network drive. Therefore all clients need to point to the same folder locations.

Usually you would just have the Data folder in a central location which would be shared with all users, this can be set by editing the CardExchange.ini file and editing the Data Directory line with the correct path.

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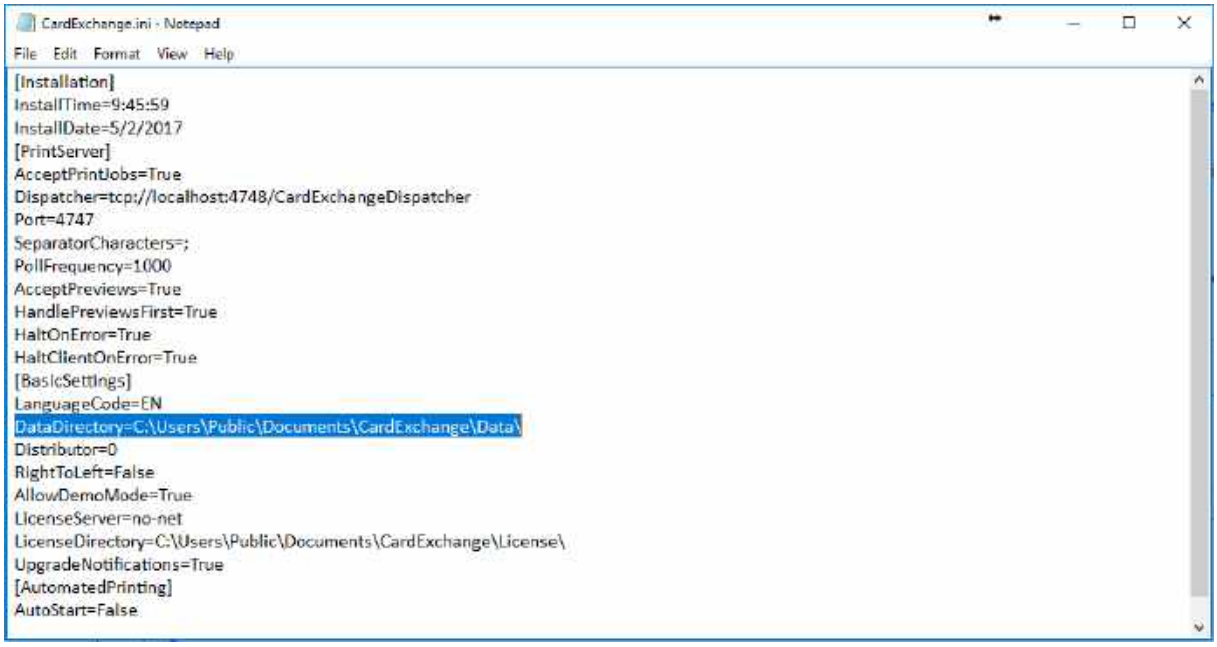

However it is also possible to specify separate paths for two important folders used by CardExchange® Visitor, the Templates folder and the Documents Folder. The documents folder contains all the signed documents like NDA's.

You can open the CardExchange.Gateway.exe.config file using the CardExchange.Config.exe utility in the install folder.
If you drag the config file onto the config utility it will automatically open in it.

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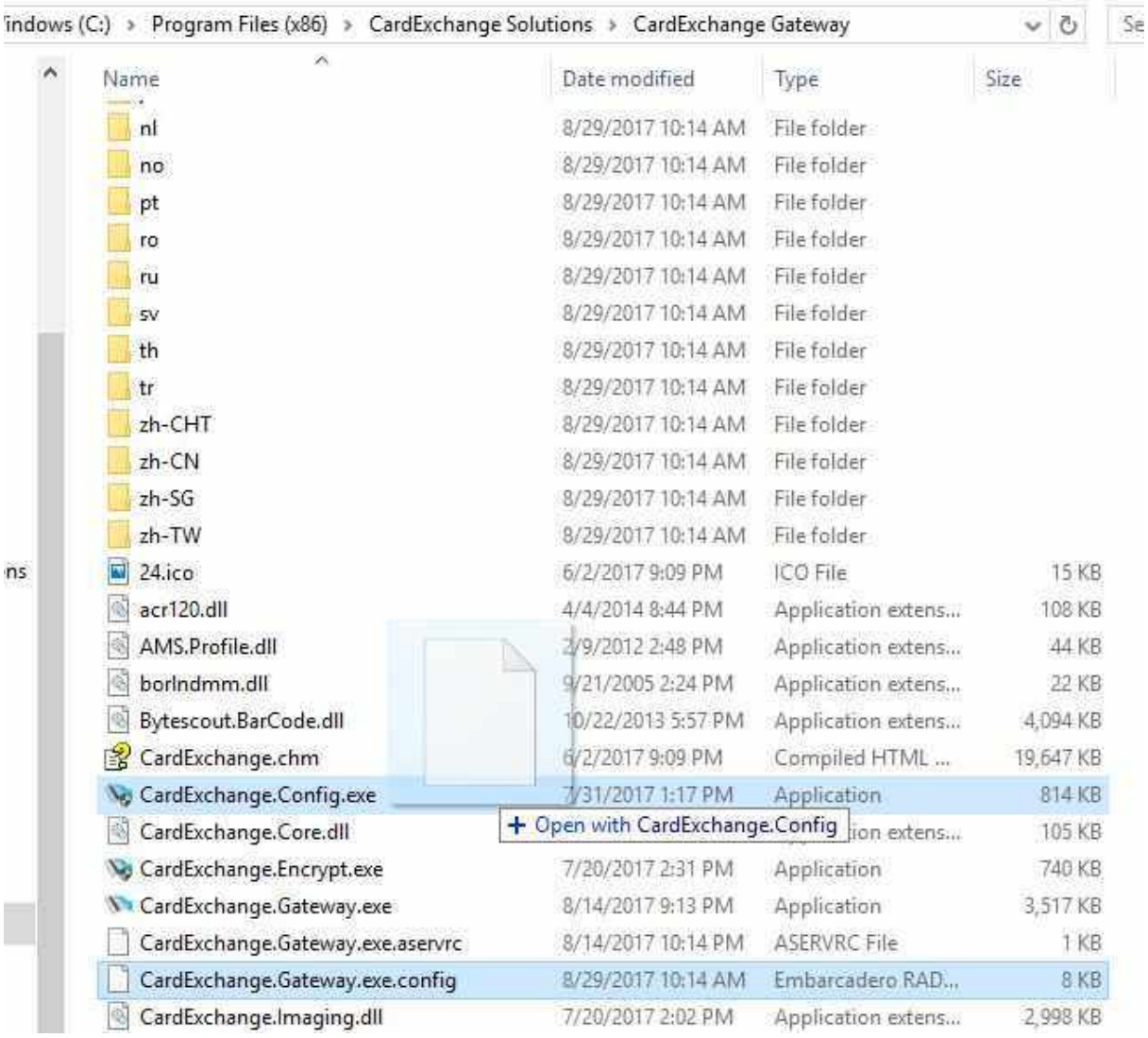

Here you can enter a different path to these folders if required.

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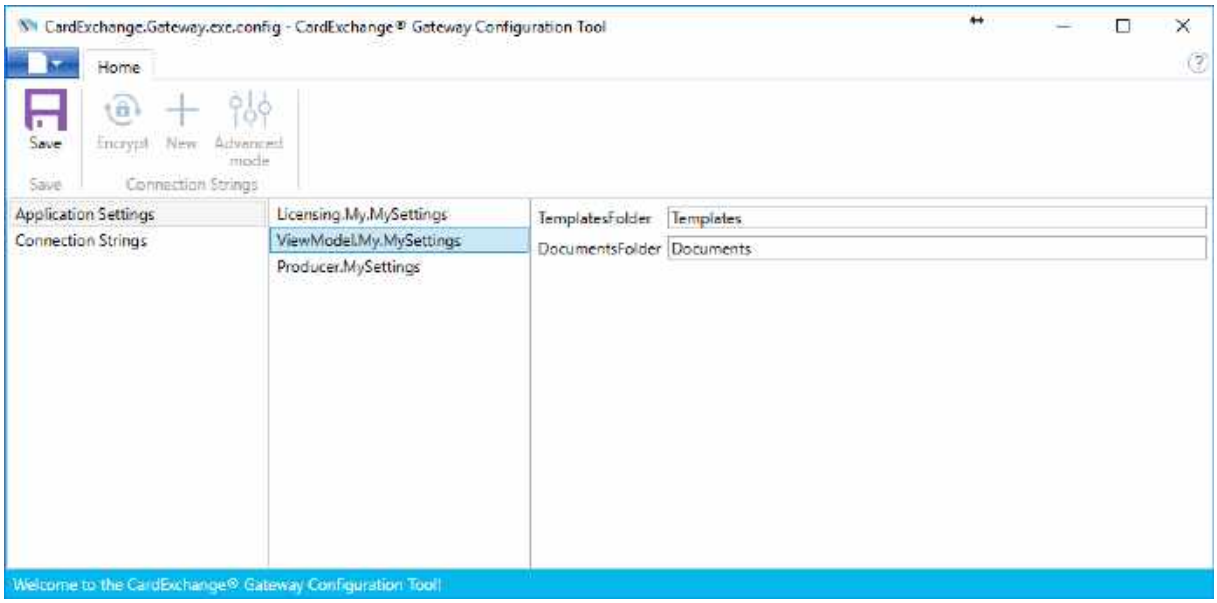
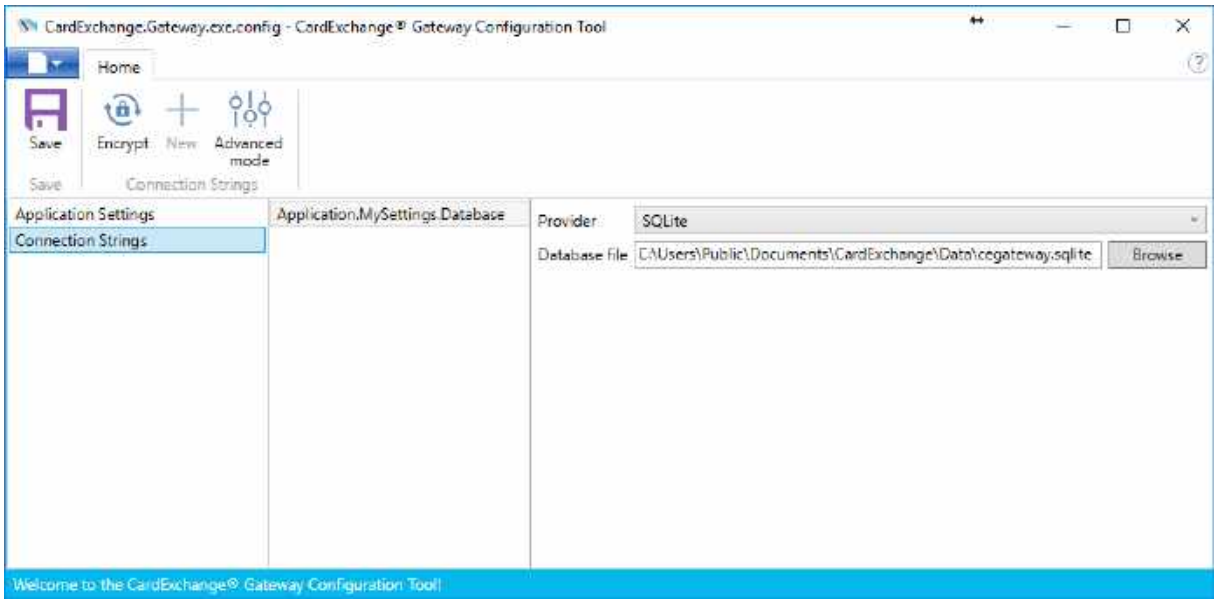


The login and permissions information is stored in the SQLite database within the Data folder, if you are planning on moving the Data folder location or you plan on sharing it among multiple user,s then you will need to change the path to this in the CardExchange.Gateway.exe.config file.

Here you can set the path to the new location under the connection strings tab.



Now save the configuration file and start CardExchange® Visitor. When CardExchange® Visitor is starting, it will now use the folder locations as defined in this file.

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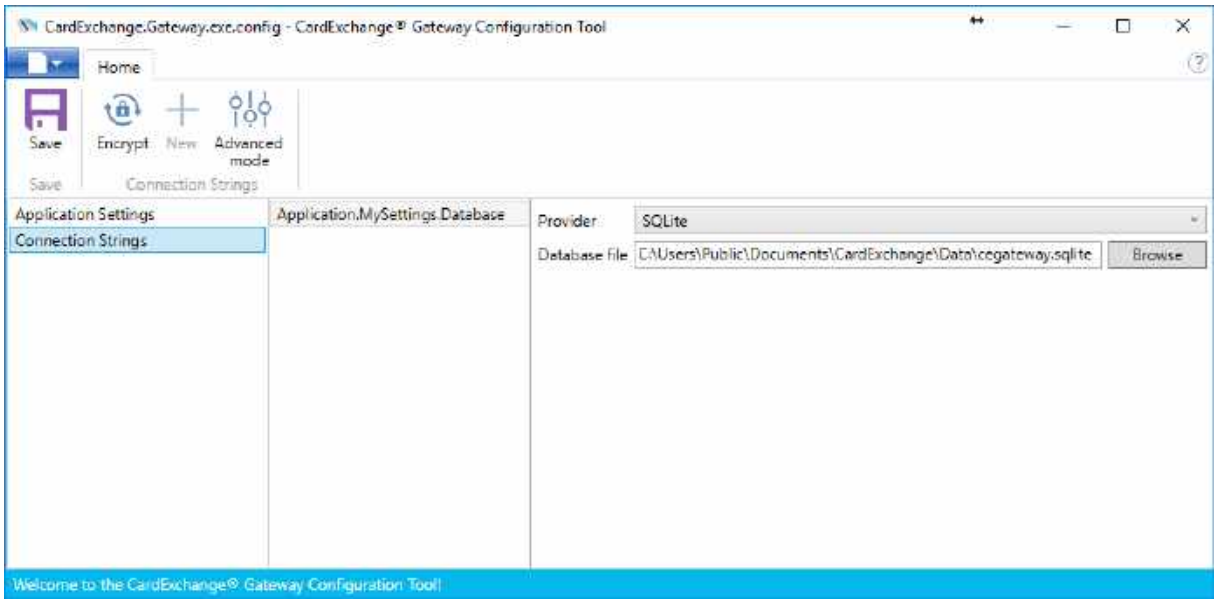
4.1.4 Encrypting Database Connection String_2

When using a MySQL or SQL Server database with CardExchange® Visitor, it is likely that you would want to protect the username and password used to connect to it.
By default these details are stored in a standard xml configuration file, so we also offer the possibility to encrypt the connection strings with this file.



Included in the configuration utility is an Encrypt option that will encrypt the database connection string within the configuration file.
Note: This process cannot be reversed so please make sure that you keep the connection details in case you need to change the connection details at a later time. Also this encrypted file is not portable between installations and can only be used on the machine it was generated on.

You can do this for both the CardExchange.Gateway.exe.config and VisitorExchange.Kiosk.exe.Config files.

4.2 CardExchange® Visitor Kiosk Client

Starting from the CardExchange® Visitor Business edition it is also possible to use the CardExchange® Visitor Kiosk Client (Additional license required).
This is a stand-alone Kiosk application for self check-in and check-out by visitors.

All editions of CardExchange® Visitor come with an internal SQLite database, also starting from the CardExchange® Visitor Business edition it is also possible to connect to MySQL and SQL Server databases.

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If you are setting up a multiple client environment on your network with for example, different buildings, lobbies, etc., we strongly advice to use this server based database support.

Although technically SQLite could handle multiple sessions, the database gets locked on the moment a client writes to the database and it can happen that, when another client attempts to write to this database at the same time, data problems or errors can occur.

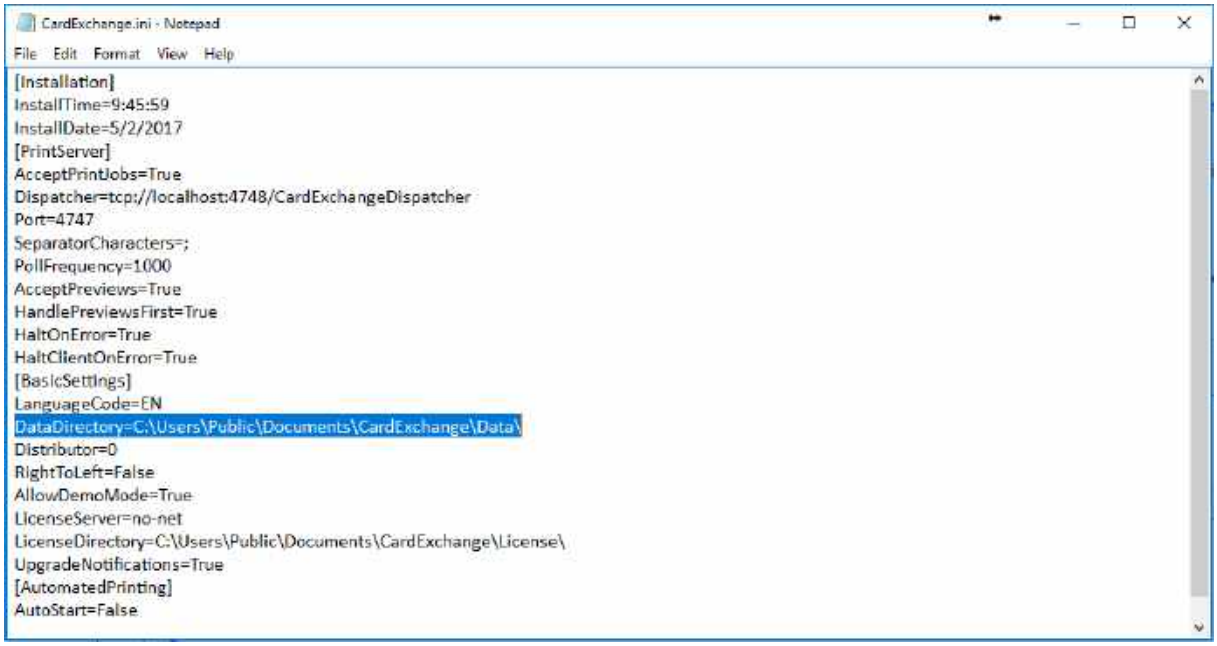
So if you are using a multiple client environment, which will be the case when running Kiosk clients, we strongly advice to use either a MySQL or SQL Server database.

CardExchange® Visitor Kiosk clients share their configuration with a full installation of CardExchange® Visitor Busines edition, which in that case will be located on a network drive. Therefore all KIOSK clients needs to point to the same configuration folder.

4.2.1 Configure Shared Folders

CardExchange® Visitor Kiosk clients share their configuration with a full installation of CardExchange® Visitor Busines edition, which in that case will be located on a network drive. Therefore all KIOSK clients needs to point to the same configuration folder.

Usually you would just have the Data folder in a central location which would be shared with all users, this can be set by editing the CardExchange.ini file and editing the Data Directory line with the correct path.



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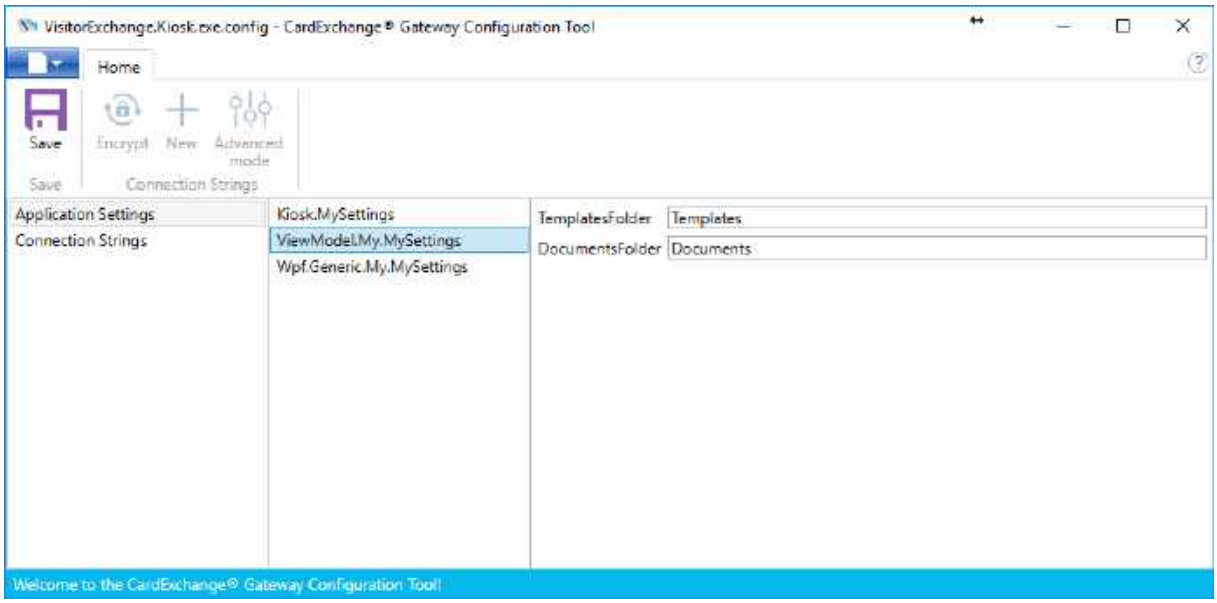
However it is also possible to specify separate paths for two important folders used by CardExchange® Visitor Kiosk, the Templates folder and the Documents Folder. The documents folder contains all the signed documents like NDA's.

The location of the folders needs to be adapted in the configuration file of CardExchange® Visitor Kiosk.
Just like when configuring the Client License, browse to the installation directory and open the VisitorExchange.Kiosk.exe.config file with the CardExchange.Config.exe utility.
If you drag the config file onto the config utility it will automatically open in it.

Here you can enter a different path to these folders if required.



The login and permissions information is stored in the SQLite database within the shared Data folder, so you will also need to change the path to this in the VisitorExchange.Kiosk.exe.config file. Here you can set the path to the new location under the connection strings tab.

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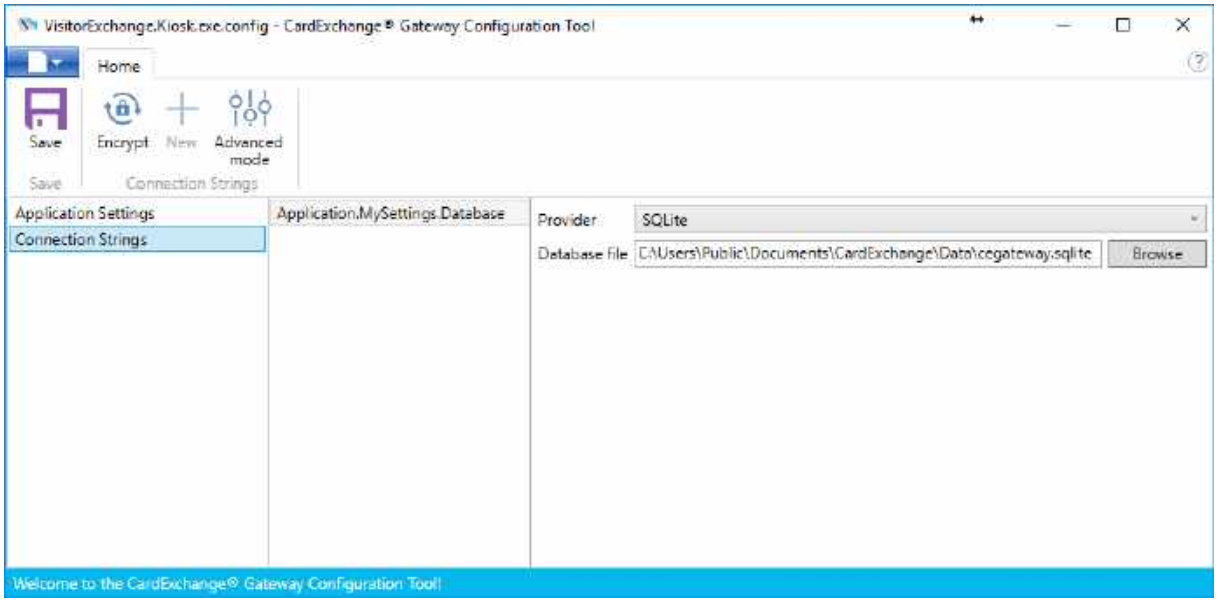

Now save the configuration file and start CardExchange® Visitor KIOSK. When CardExchange® Visitor KIOSK is starting, it will now use the folder locations as defined in this file.

4.2.2 Configuring MySQL Database

To use the KIOSK Client with a MySQL database, each KIOSK Client will have to be configured for that. The location of the database is set in the CardExchange® Kiosk Configuration file.

This VisitorExchange.KIOSK.exe.config file is located in the installation directory you selected during the installation, typically this would be:

C:\Program Files (x86)\CardExchange Solutions\CardExchange Gateway\ by default.

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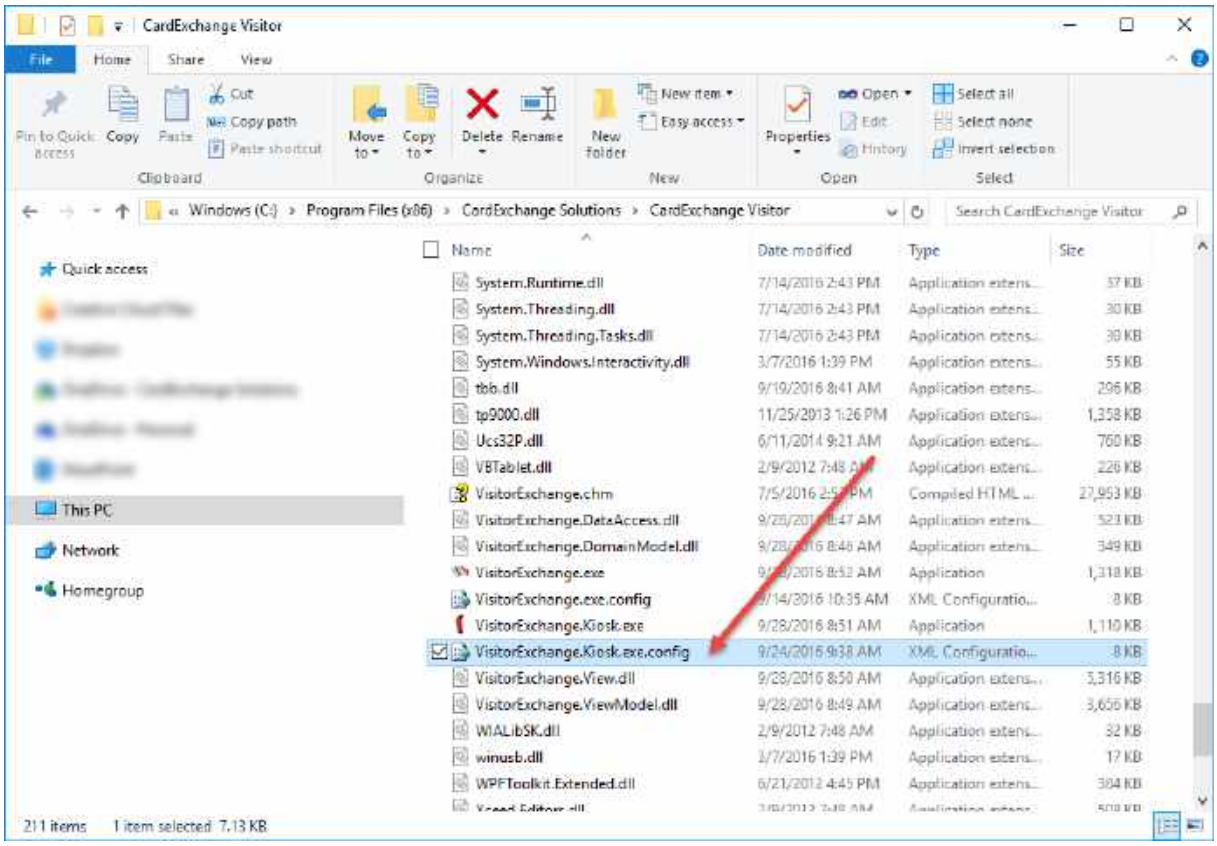
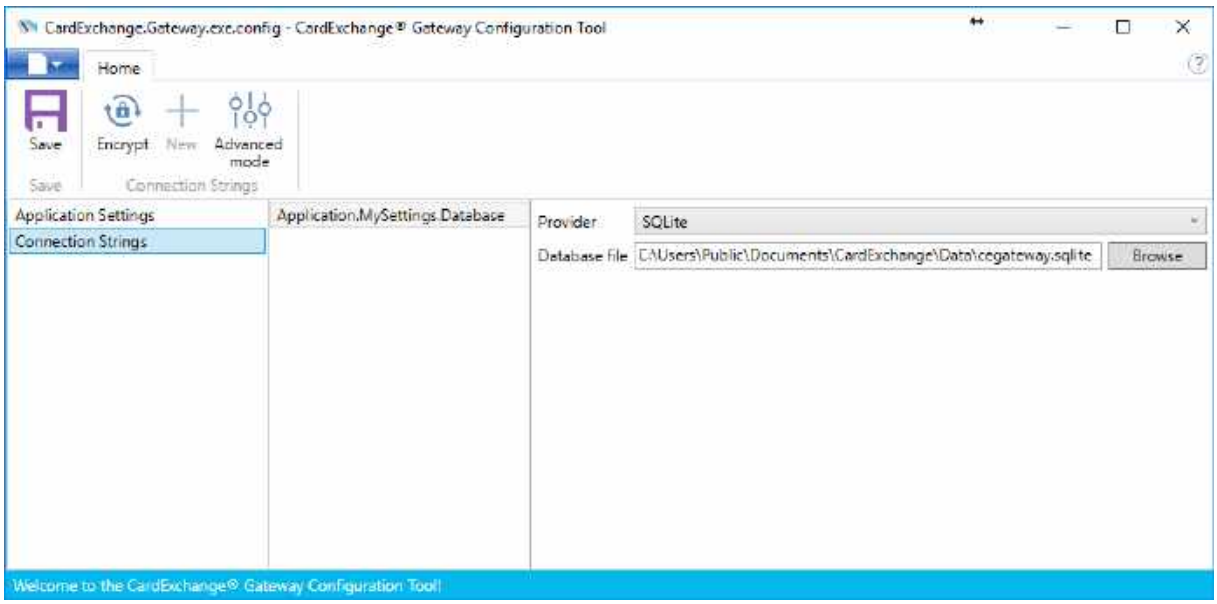


You can open the CardExchange.Gateway.exe.config file using the CardExchange.Config.exe utility in the install folder.
If you drag the config file onto the config utility it will automatically open in it.

Here you can now change the server/login credentials under the connection strings tab.



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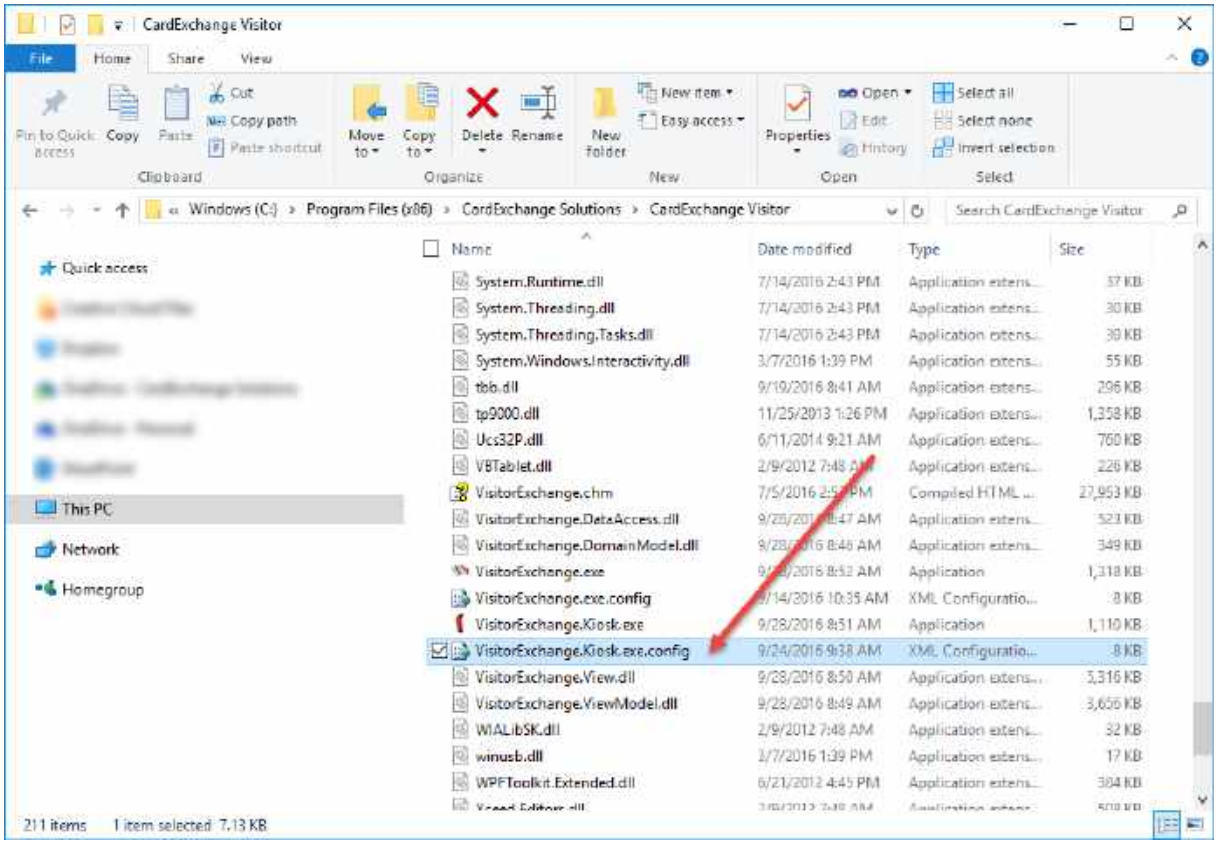
Now save the configuration file and start CardExchange® Visitor KIOSK. When CardExchange® Visitor KIOSK is starting, it will now use the MySQL database you have just created.

4.2.3 Configuring SQL Server Database

To use the KIOSK Client with a SQL Server database, each KIOSK Client will have to be configured for that. The location of the database is set in the CardExchange® Kiosk Configuration file.

This VisitorExchange.KIOSK.exe.config file is located in the installation directory you selected during the installation, typically this would be:

C:\Program Files (x86)\CardExchange Solutions\CardExchange Gateway\ by default.



You can open the CardExchange.Gateway.exe.config file using the CardExchange.Config.exe utility in the install folder.
If you drag the config file onto the config utility it will automatically open in it.

Here you can now change the server/login credentials under the connection strings tab.

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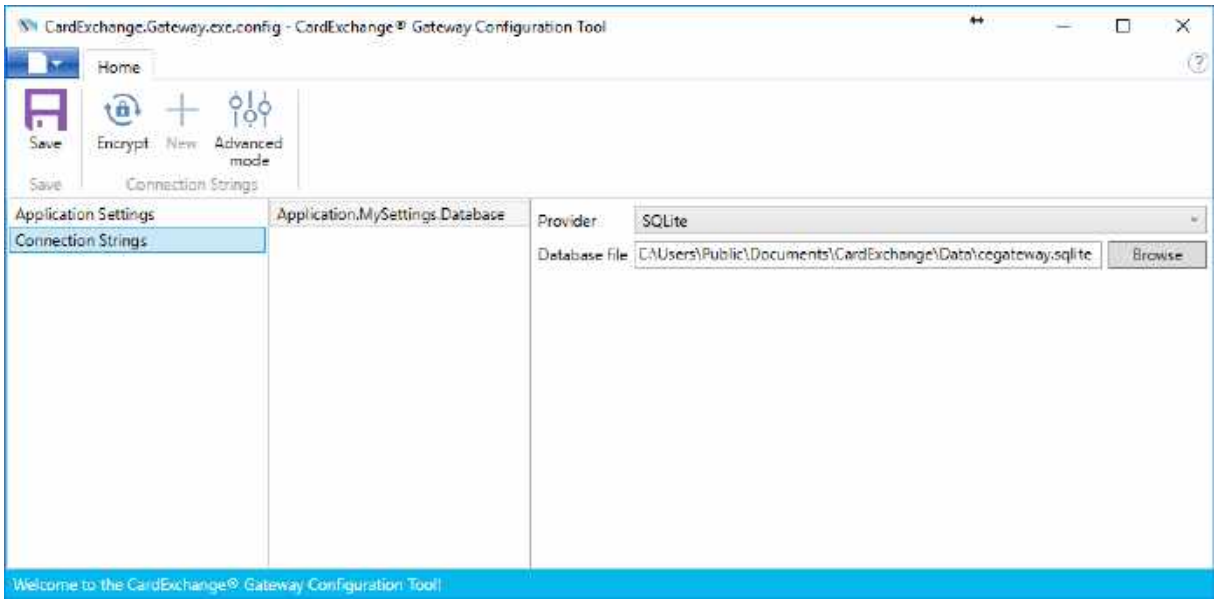
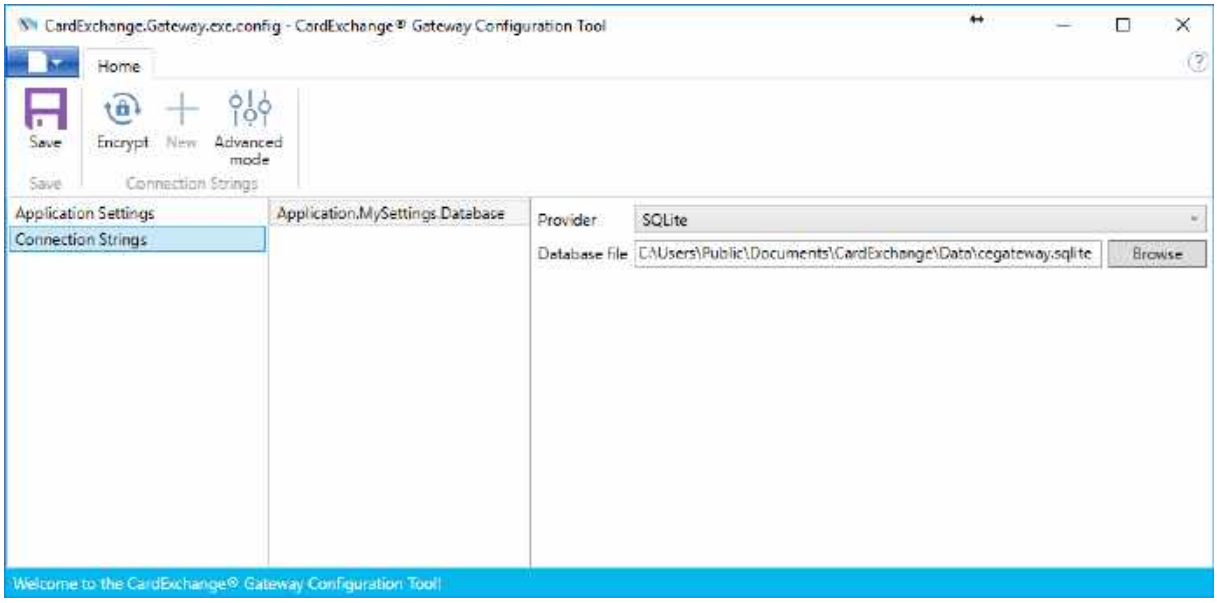


Now save the configuration file and start CardExchange® Visitor KIOSK. When CardExchange® Visitor KIOSK is starting, it will now use the SQL Server database you have just created.

4.2.4 Encrypting Database Connection String

When using a MySQL or SQL Server database with CardExchange® Visitor Kiosk, it is likely that you would want to protect the username and password used to connect to it.
By default these details are stored in a standard xml configuration file, so we also offer the possibility to encrypt the connection strings with this file.



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Included in the configuration utility is an Encrypt option that will encrypt the database connection string within the configuration file.

Note: This process cannot be reversed so please make sure that you keep the connection details in case you need to change the connection details at a later time. Also this encrypted file is not portable between installations and can only be used on the machine it was generated on.

You can do this for both the CardExchange.Gateway.exe.config and VisitorExchange.Kiosk.exe.Config files.

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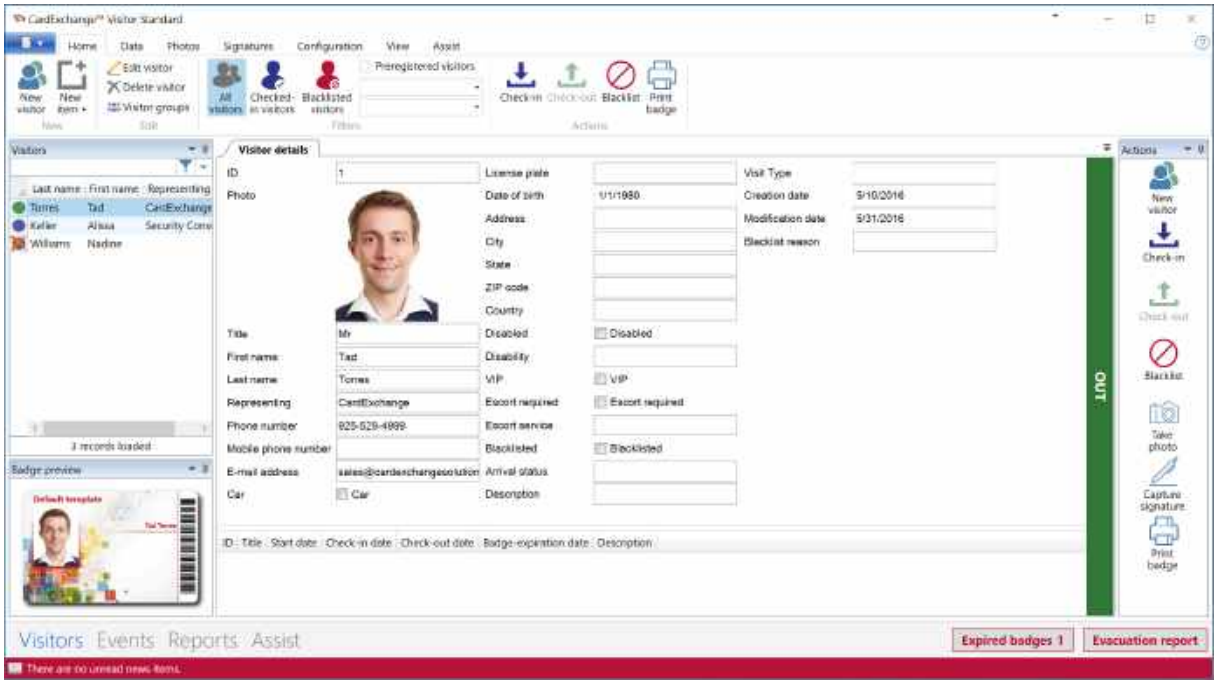
5 Working With Visitors



In the Visitors view you can carry out all the operations associated with Visitors, you can add/edit visitors, Check-in/Check-out visitors, add Events etc...

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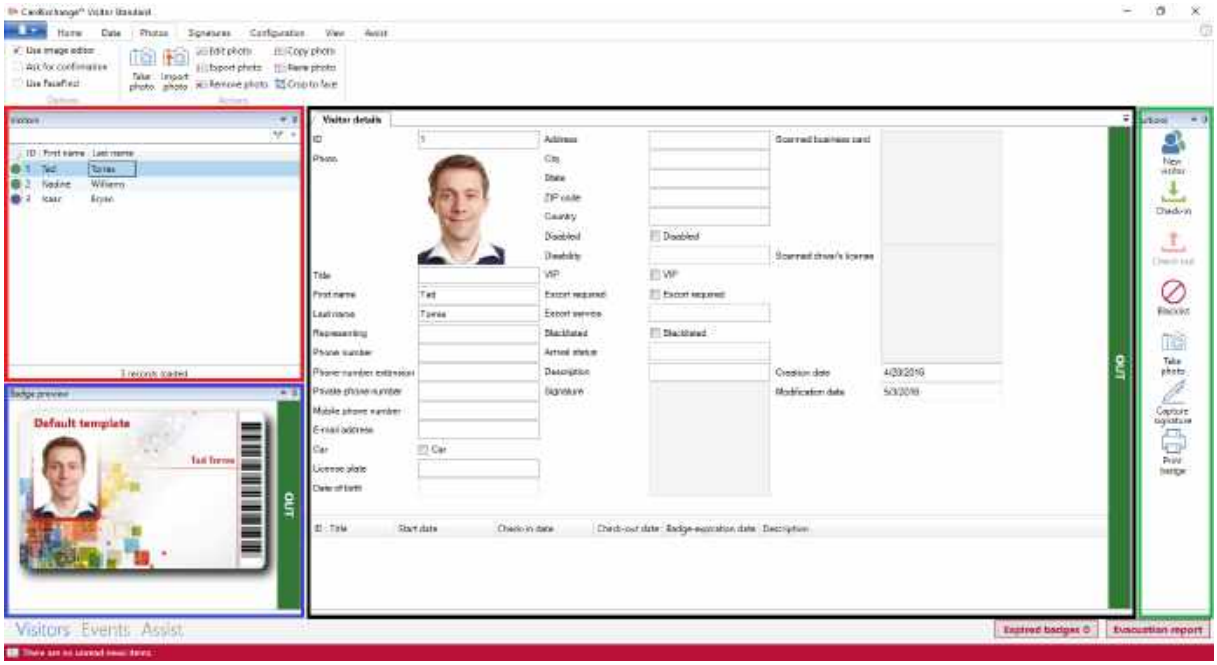
5.1 Layout



The Visitors view has four panes that can be moved, resized or hidden based on the users preferences.

- The Visitors pane (Shown above in red) shows a list of all the visitors.
- The Badge preview pane (Shown above in blue) shows the preview of the visitor badge with the selected visitors details.
- The Visitor details pane (Shown above in black) shows all the available data for the selected visitor including photo/signature.
- The Actions pane (Shown above in green) contains shortcuts to the most common actions such as Check-in, Check-out and Print badge.

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5.1.1 Visitors Pane

In the Visitors pane of CardExchange® Visitor you see all the records presented that are available in the database. In the configuration tab you can set the Look-up columns that are displayed in the Visitors pane.

Also shown here is the current status of the visitor shown by the colored circle next to their name.
These status markers show whether they are currently checked-in/checked-out, pre-regestered for an event etc...
For more info please see the Status Markers 135 section.

Record Sorting

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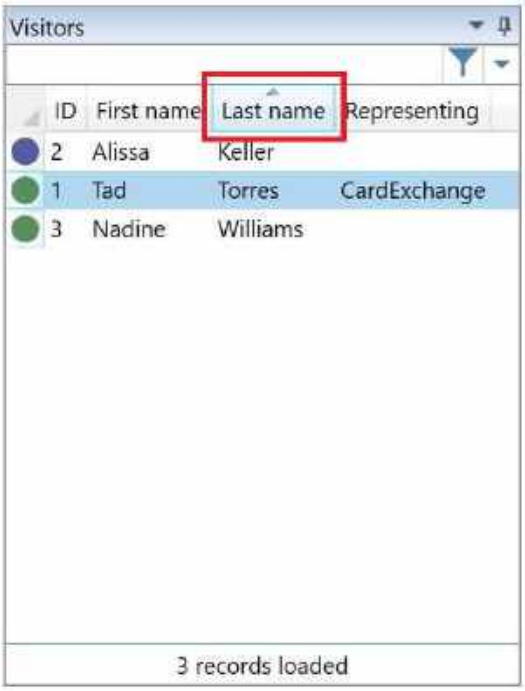
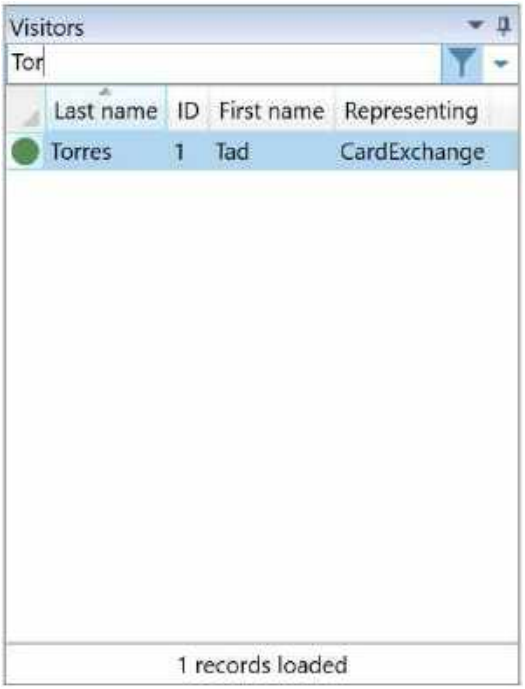


The Visitors pane is a so called data grid showing all your available database records divided by columns. Sorting the records is just as simple as clicking on the column.

Record Look Up



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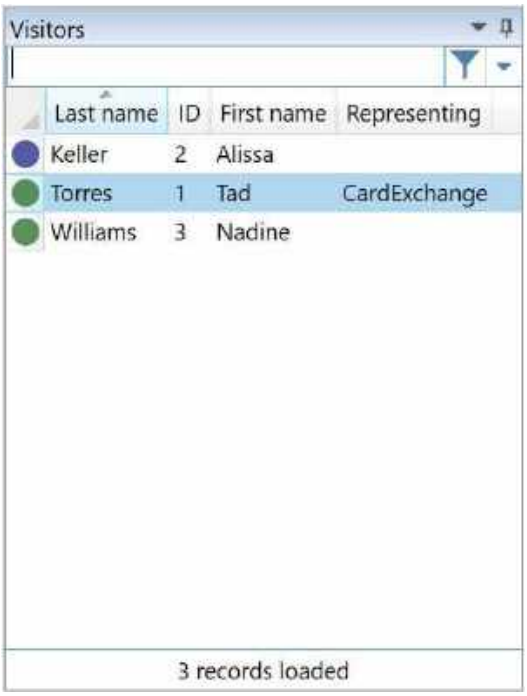
It is very simple to search for records inside the Visitors pane. Enter the text that you want to search for in the text box directly above the columns. The text you enter always applies to the first column in the Visitors pane. If you want to look up records from the Last name column, you have to drag the column to the front.

Loaded Record Information



In the footer of the Visitors pane the total amount of loaded records is shown.

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5.1.2 Badge-Preview Pane

The Badge preview shows a live preview of the visitors badge with the data from the selected visitor.

5.1.3 Visitor Details Pane

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The Visitor details pane shows all of the database fields for the selected visitor including their photo and signature.
From the configuration tab you can select Detail columns to customize which fields you want to make available here.

Also shown is the current status of the visitor in a colored status bar, for example above the visitor is showing as currently checked-out.
For more info please see the Status Markers 135 section.

5.1.4 Actions Pane

In the Actions pane, located at the right side of the main interface, seven different buttons can be shown.

Clicking New visitor will bring up the New visitor window so you can enter the visitor details.

Clicking Check-in will directly check-in the selected visitor(s).

Clicking Check-out will directly check-out the selected visitor(s).

Clicking Blacklist will add the selected visitor(s) to the blacklist to prevent them from being able to be checked in.

When clicking on the Take photo button, the camera that is selected will be previewed in the PhotoExchange window. Configuration of the Photo functionality is explained in the "Using Photos 166" section of this Help file.

If you have the Standard edition or higher, the Capture signature button is show. When clicking it will start the signature pad connected. In the "Use Signatures 182" section of this Help file you can find out how to configure this functionality.

Clicking Print badge will print the visitor badge for the selected visitor(s).

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5.1.5 Status Markers

The current status of a visitor is shown in two places:

- By the colored circle next to their name in the visitors pane
- By the colored bar down the right hand side of the visitor details pane

These status markers show whether they are currently checked-in/checked-out, pre-regestered for an event etc...

We have the following statuses:

	Current Status	Status Marker	Status Bar text
1	Checked-out and not pre-registered	Green circle	OUT
2	Checked-in for an incidental visit	Blue circle	IN
3	Checked-in for an incidental visit and expired	Blue circle with blue cross	EXPIRED
4	Checked-out and pre-registered, but not yet allowed to check-in	Orange circle	PRE-REGISTERED
5	Checked-out, pre-registered and allowed to check-in	Orange circle with green spot	PRE-REGISTERED
6	Checked-in for a pre-registered event	Orange circle with a blue spot	IN
7	Checked-in for a pre-registered event and expired	Blue circle with orange cross	EXPIRED
8	Blacklisted while still checked in (precedes over 2, 3 and 6)	Blue circle with red cross	BLACKLISTED
9	Blacklisted and checked-out (precedes over 1, 4, 6 and 7)	Red circle	BLACKLISTED

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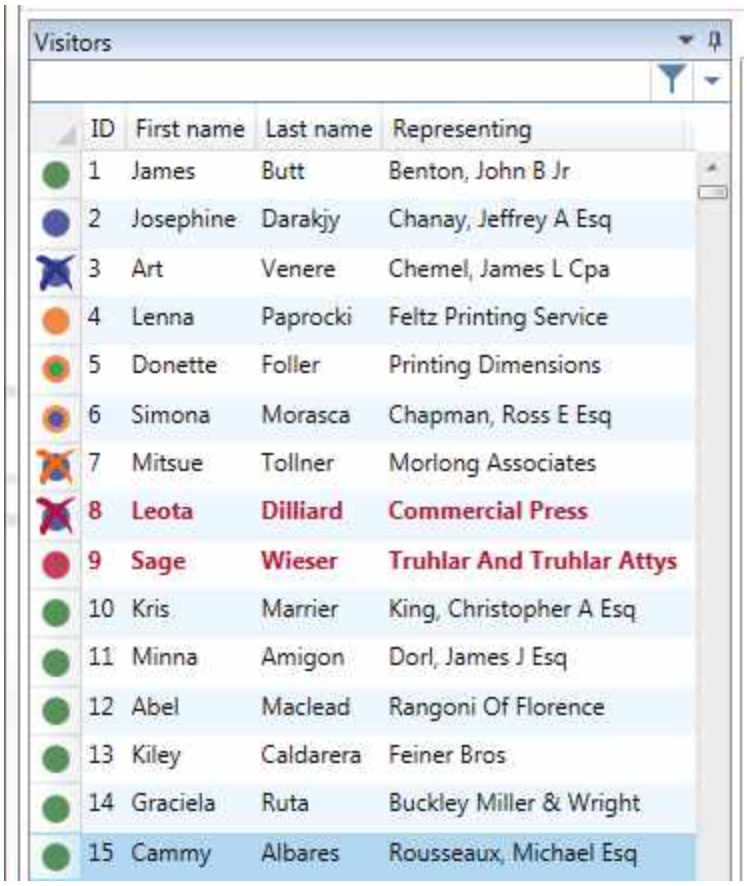

The idea is that the user easily recognizes that:

- All visitors with green in their icon are ready to check-in
- All visitors with blue in their icon are in the building
- All visitors with orange in their icon are pre-registered
- All visitors with red in their icon are blacklisted
- All visitors with a cross should leave the building

5.2 Home

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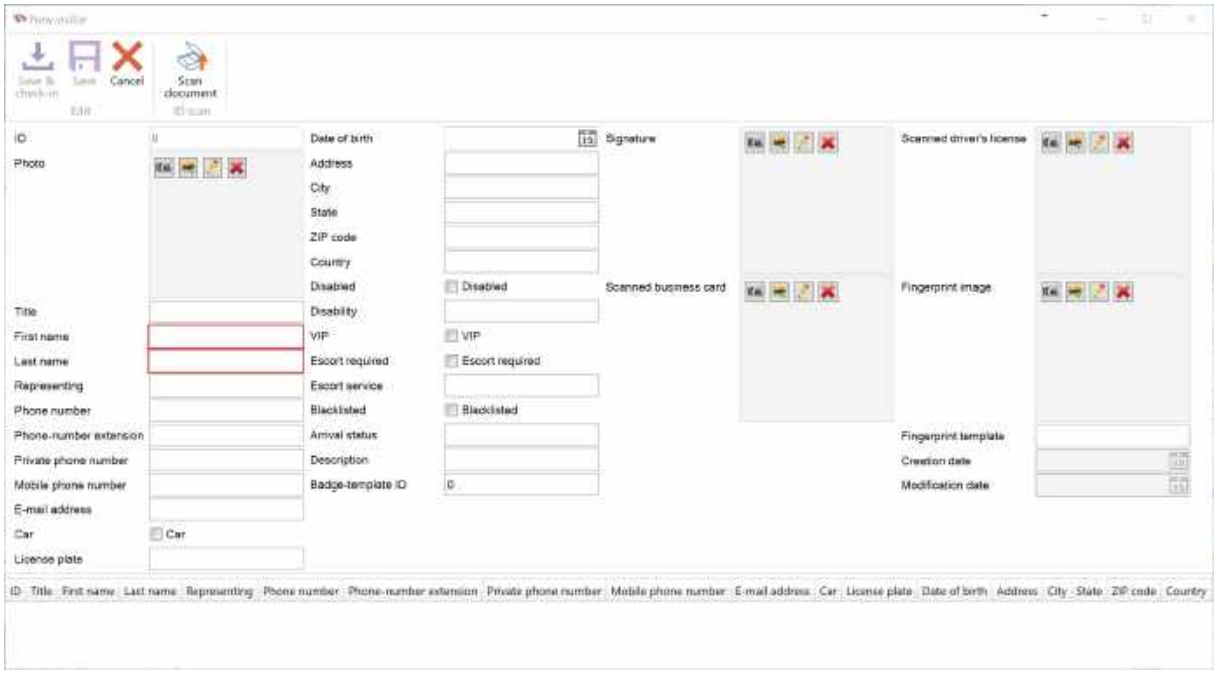
From the Home tab of the Visitors view it is possible to carry out the most common functions required in the use of CardExchange® Visitor.
In this section of the Help file we will go over all the functionality available like adding visitors/events, using Filters, checking-in and checking-out, etc.

5.2.1 New visitor

Clicking on **New visitor** will open the New visitor window.



Here you can enter all the details for the visitor, capture their photo, signature and biometric image (Depending on your edition).
You can also populate the fields by clicking on Scan document 138 and scanning the visitors drivers license or passport.

The First name and Last name fields are required fields, the others are all optional.
You can then either click on Save, Save & check-in or Cancel.

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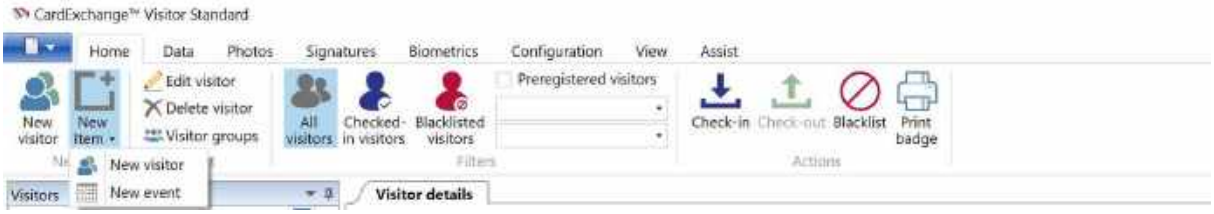
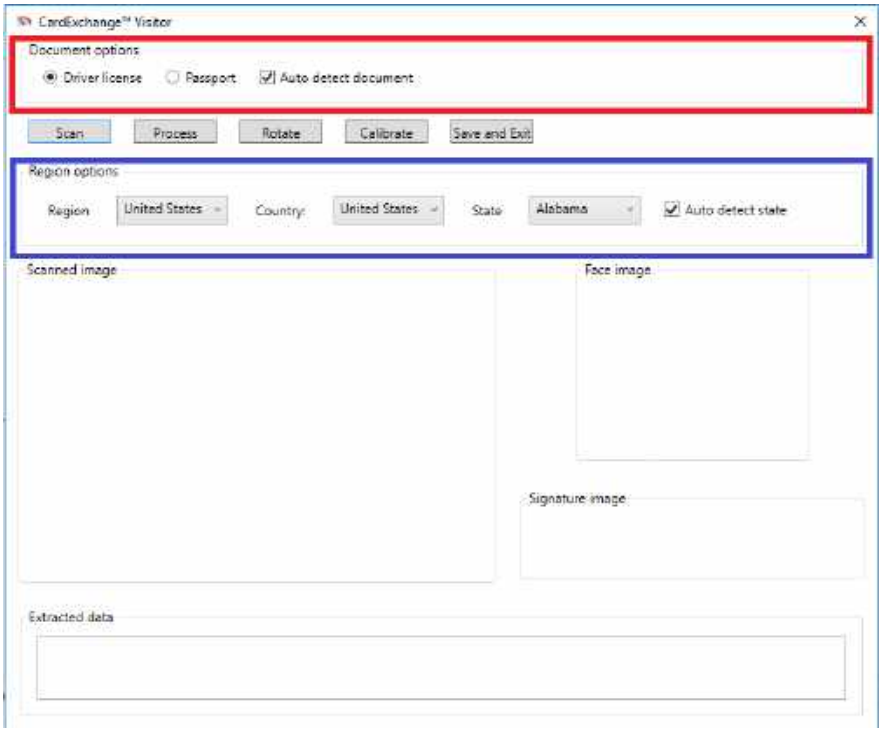


Clicking on **New item** gives you the choice of creating a new visitor or a New event 252.

5.2.1.1 ID Scan

You can populate the fields for a new visitor by clicking on Scan document and scanning the visitors drivers license or passport.



Simply select the document options shown in red and the region options shown in blue, then click on Scan.

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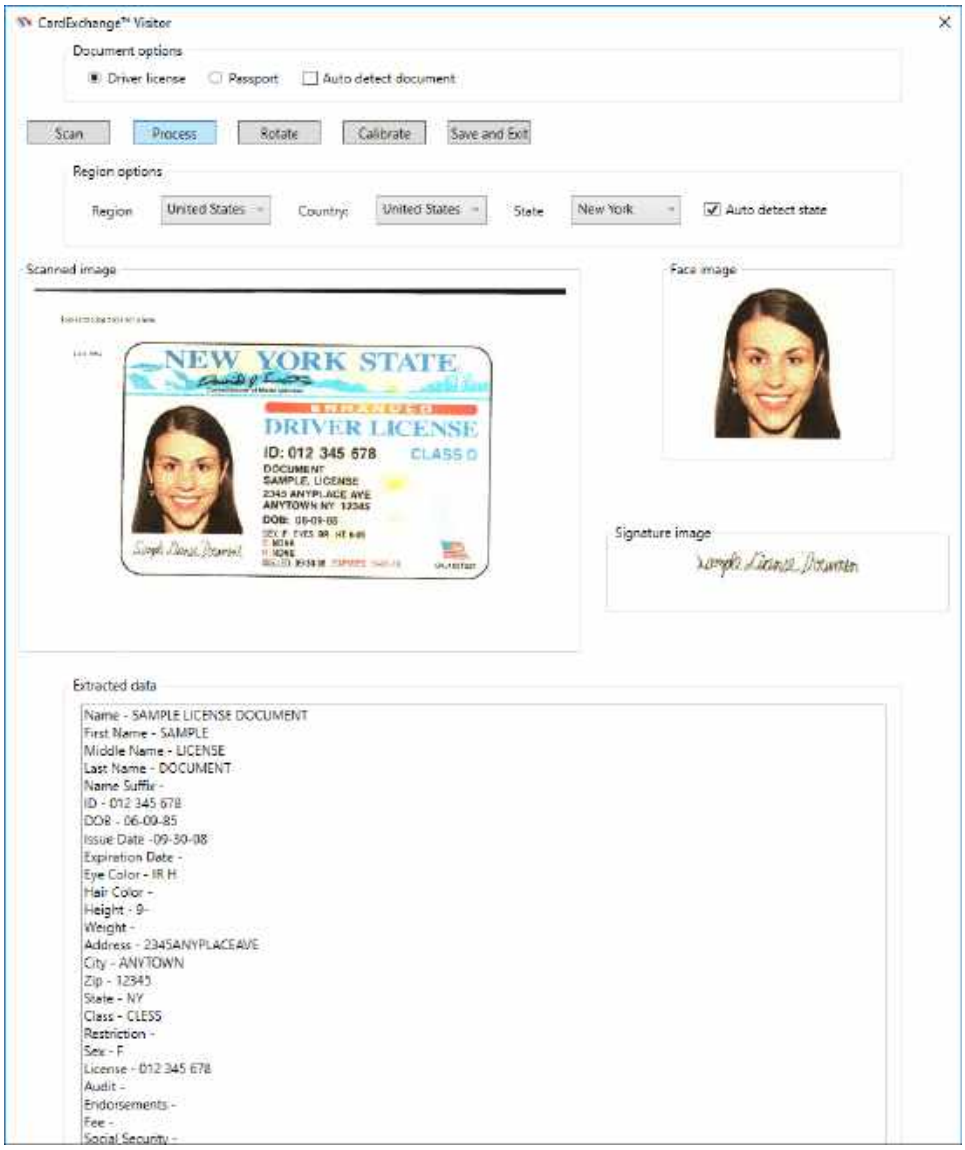

Once scanning is complete click on Process and the data will be extracted as shown above.

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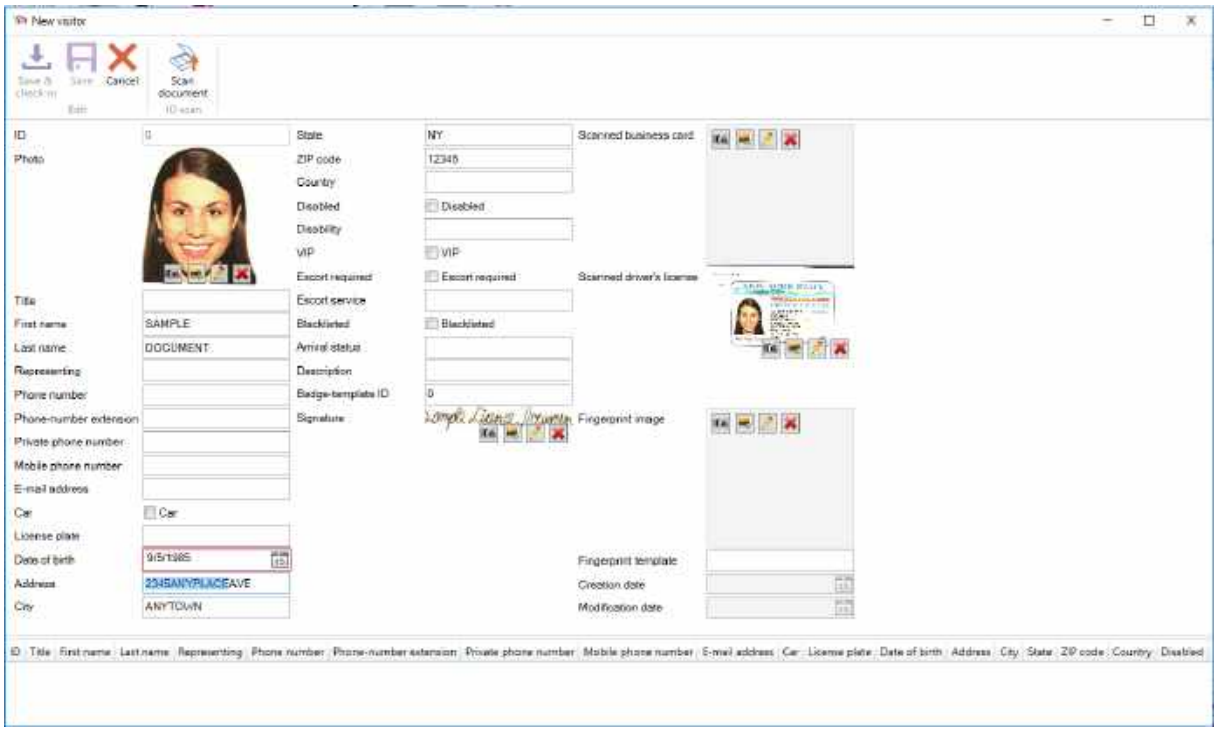

Clicking on Save & Exit will create the new visitor and display the Visitor details pane where you can add/edit any other information.

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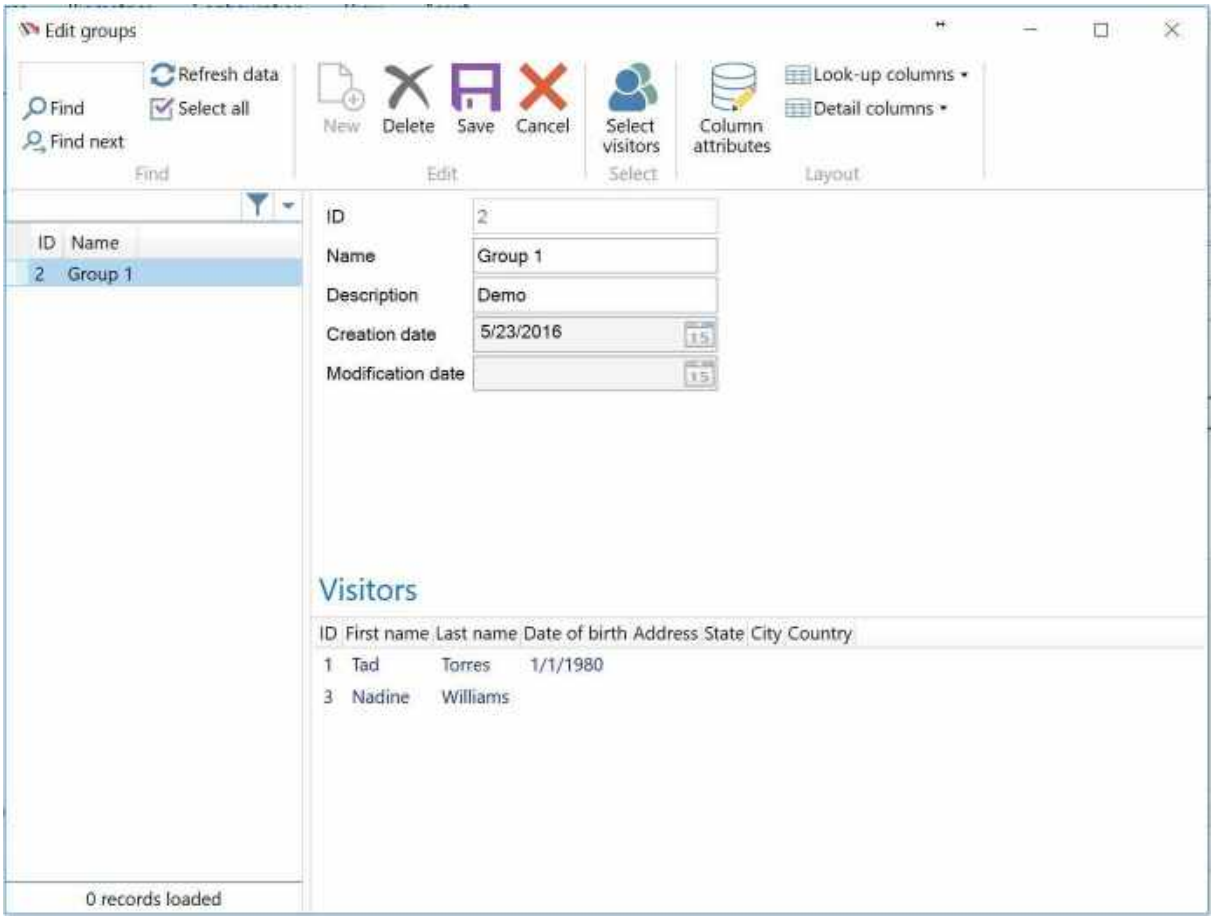
5.2.2 Visitor Groups



Visitor groups can be created so that all visitors within that group can be managed together.
When used with the Group filter from the Filters 149 section, the status of all visitors within that group can easily be seen in the main CardExchange® Visitor window without looking up each visitor individually.
You can also check-in/check-out all visitors within that group as one action instead of individually.

The simplest way of searching for an existing group to edit, is to use the group list that is displayed at the left-hand side of the Visitor groups window. You can use the scroll bar to scroll through the list to find the correct group and then select it by clicking. The group list may be sorted in various ways and is not necessarily alphabetical. You must take this into account when searching for a group.

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In the groups list you will see all of the groups that are available in the database. In the Layout section of the ribbon you can set the Look-up columns that are displayed in the group list.

Group Sorting

The group list is a so called data grid showing all your available groups divided by columns. Sorting the groups is just as simple as clicking on the column.

Group Look Up

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It is very simple to search for groups within the group list. Enter the text that you want to search for in the text box directly above the columns.

Loaded Record Information

In the footer of the group list the total amount of loaded records is shown.

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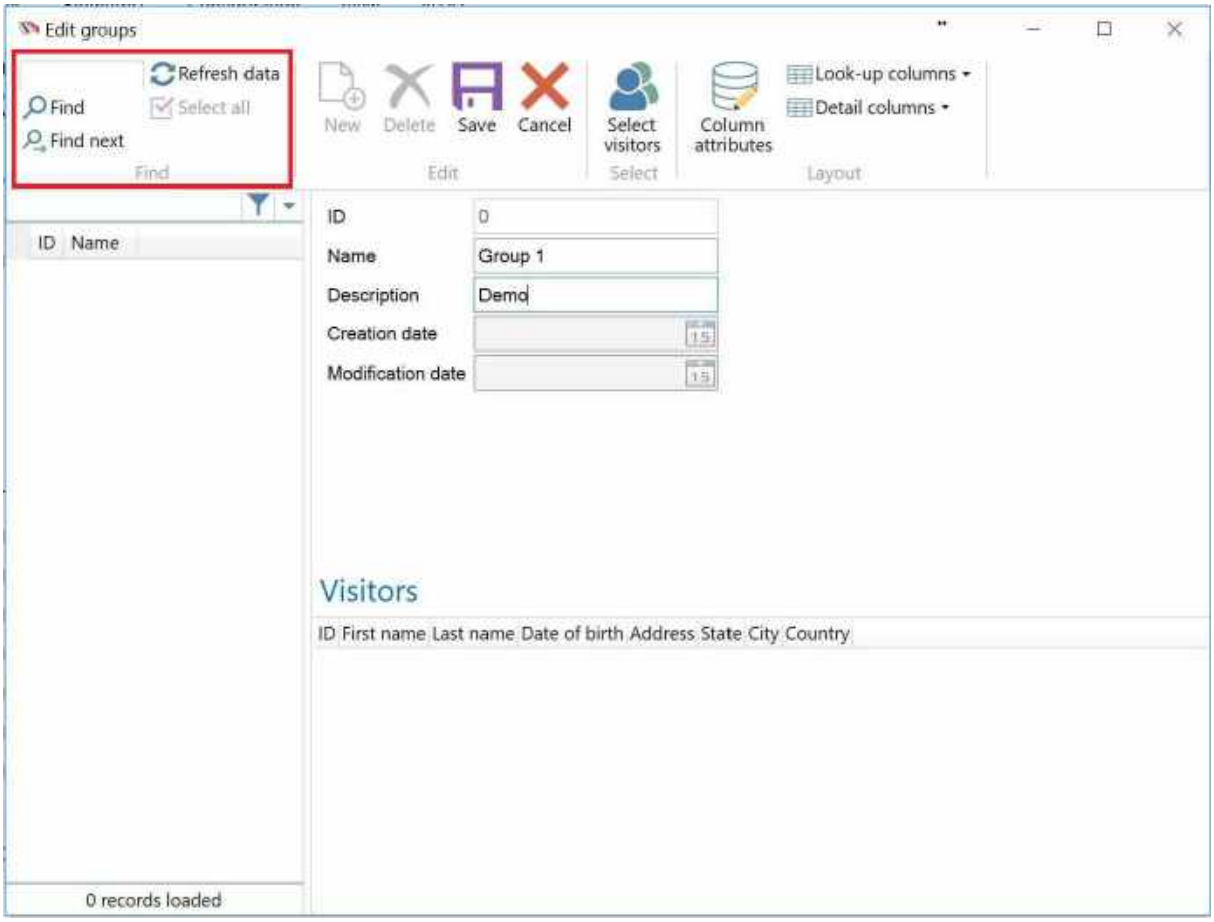
You will notice that this method becomes less attractive if the list is very long and that you need a more directed manner of finding the correct data. Another option for finding groups is to use the Find section of the ribbon as mention in the following section.

5.2.2.1 Find



In the **Find** section you can search for groups to easily find them. If you click on Find, you enter a dialog window in which you can enter a combination of letters or digits to search on (only alphanumeric characters).

If you then click OK, the first element from the list of names that contains the requested combination is selected.

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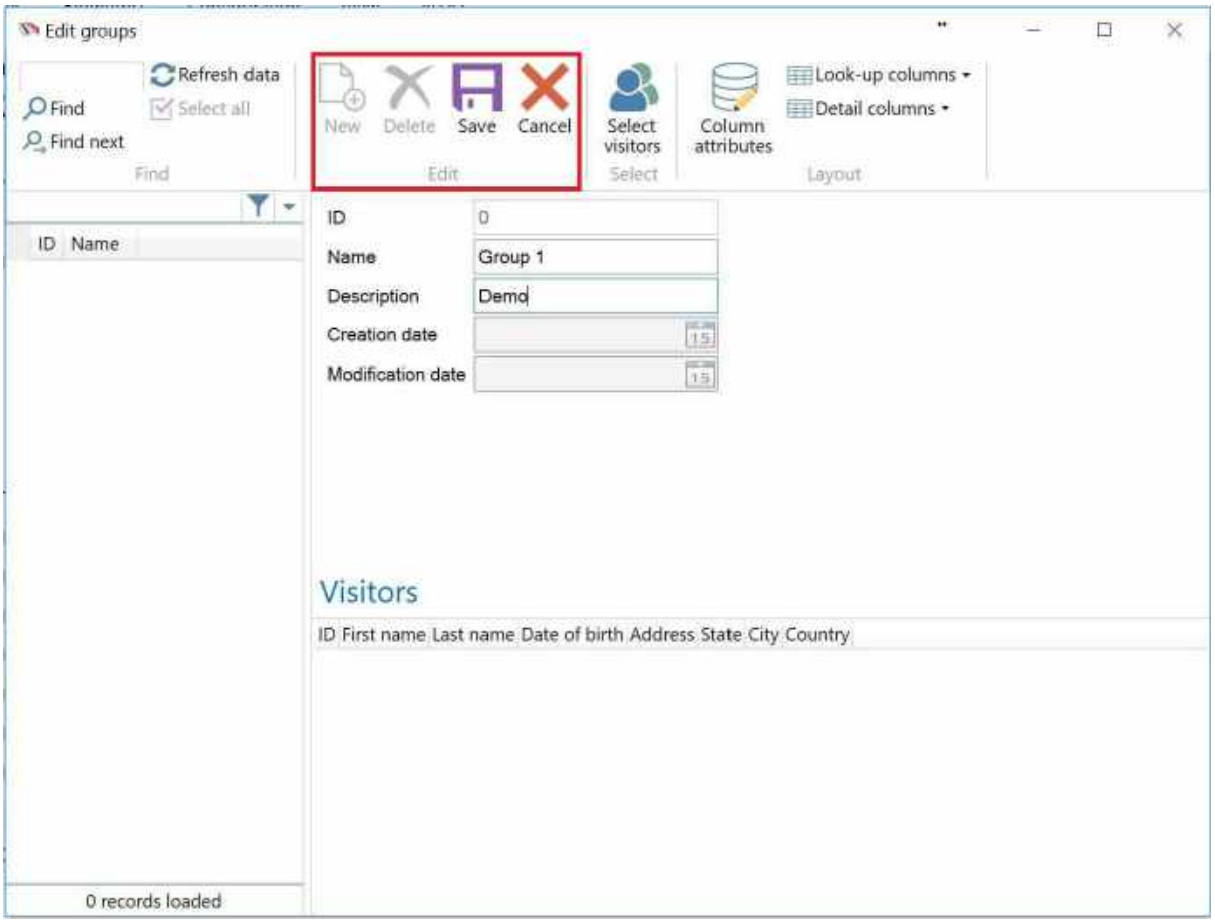
If the first match is not the one you are looking for, you can search on the same combination by clicking the **Find next** button. You can repeat this until you have found the correct person.

The advantage of searching in this way is that the text you enter does not need to be at the start of an element in the groups list. The search does not make a distinction between uppercase and lowercase characters.

With this **Find** function, all elements in the groups list remain visible. Any restrictions to the number of records that are displayed, which would normally apply as a result of what you have entered in the text field, are overruled.

The **find** functions are also available from the keyboard. You can display the window Find by simultaneously pressing the **control key** and the letter **f**. You can repeat the search as often as is required to find the correct person by pressing the **F3** function key.

5.2.2.2 Adding Visitor Groups



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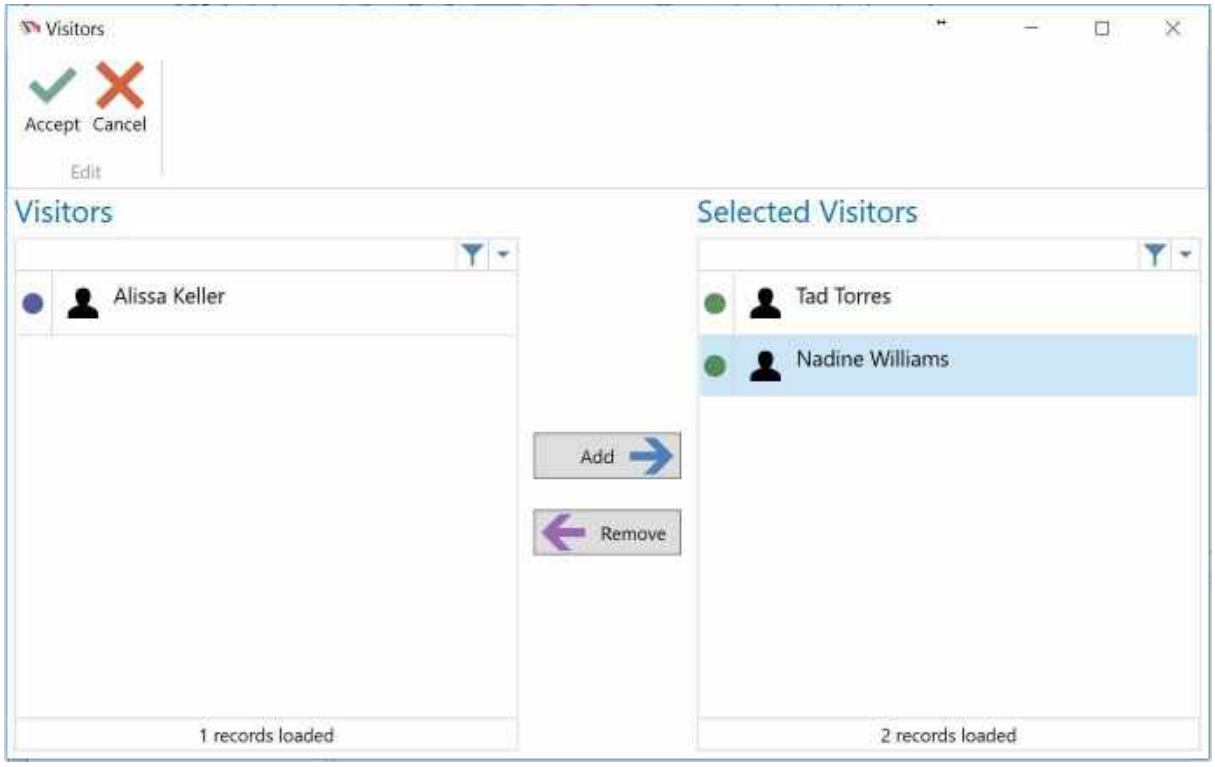
To add a new group, simply click on the New button. You can now specify a name and description for the group.

Once you have done that you need to add some visitors to the group, to do this click on the Select visitors button.



You can search fo visitors and then add or remove them from the group using the Add/Remove buttons.
Once you are done you can click on Accept or Cancel and you will go back to the previous window.

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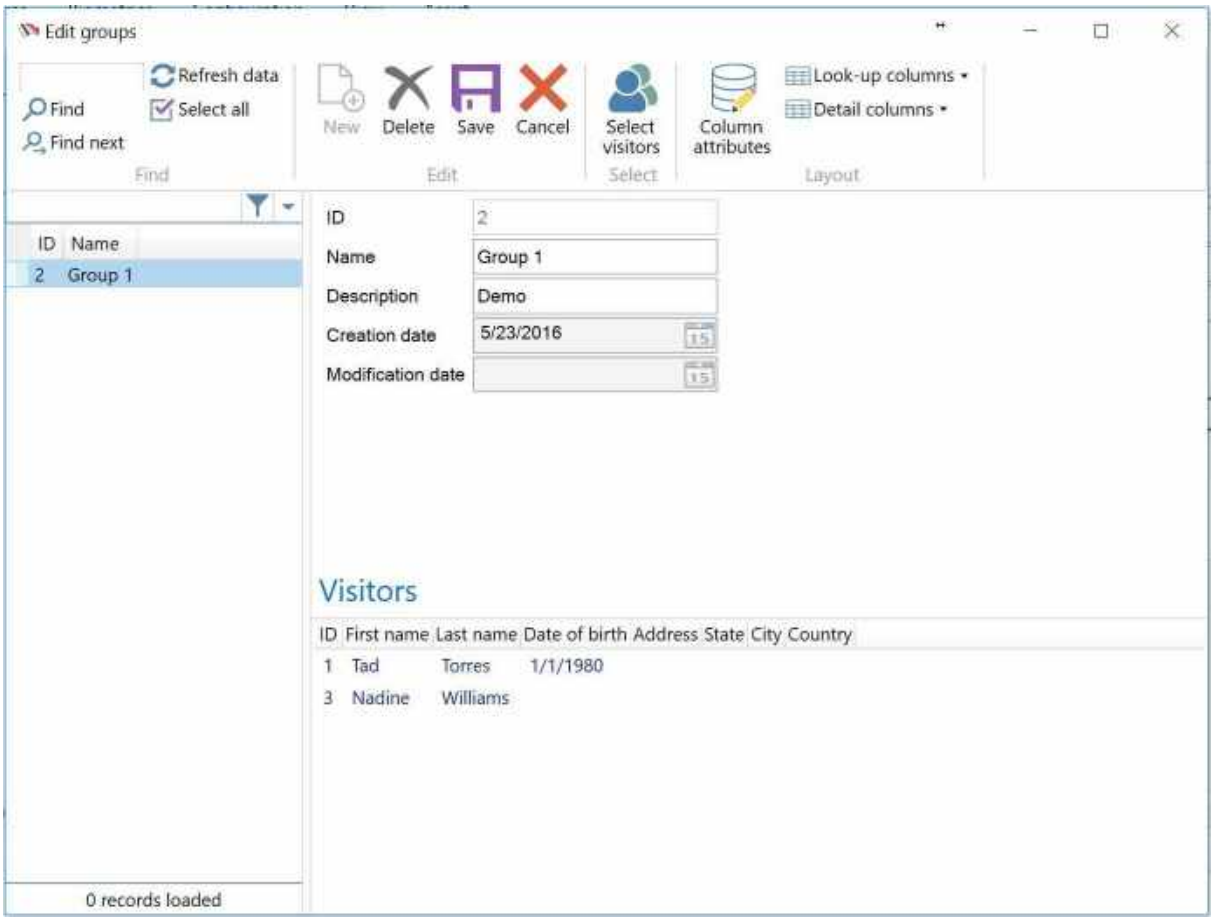

The last step is to click on Save to save the new group, you can also edit groups using the same method above to add/remove visitors.

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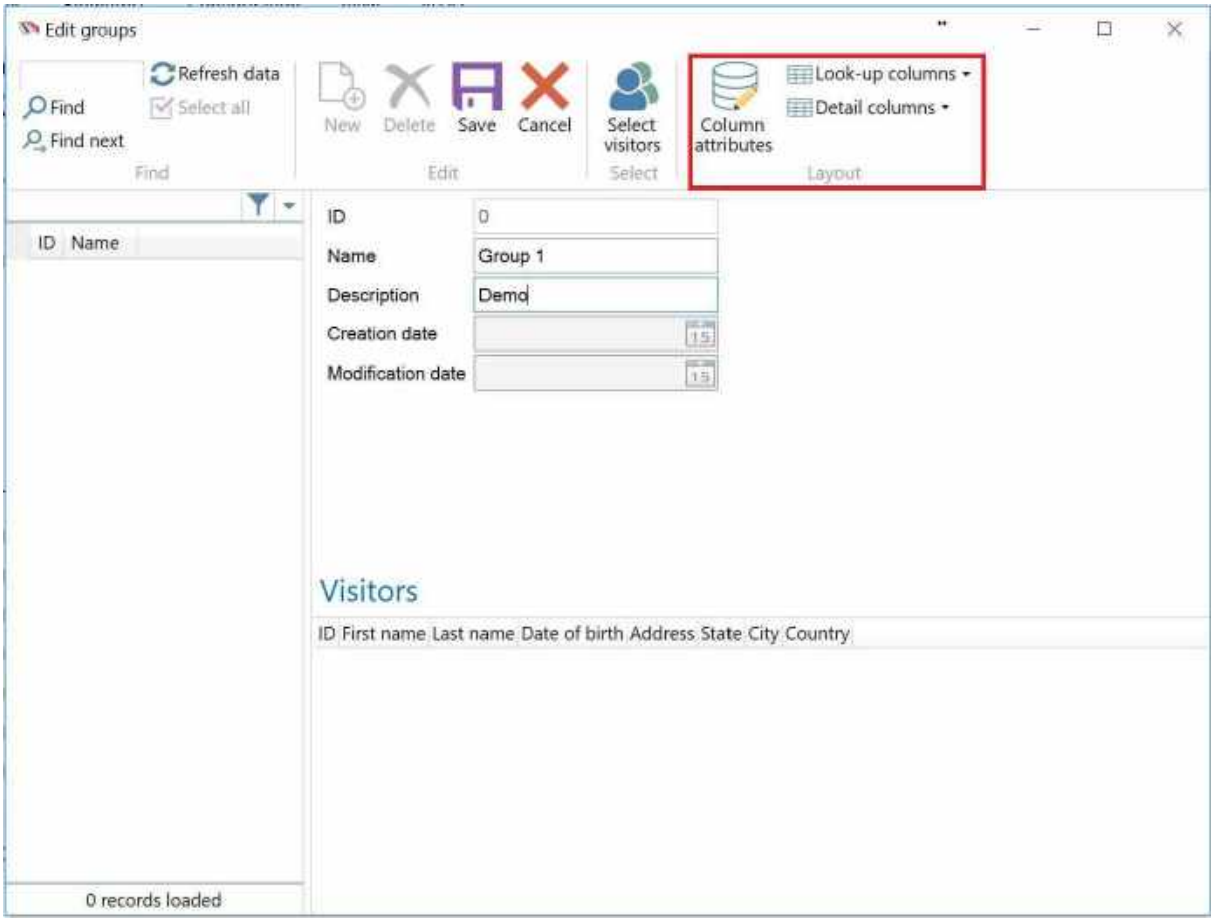
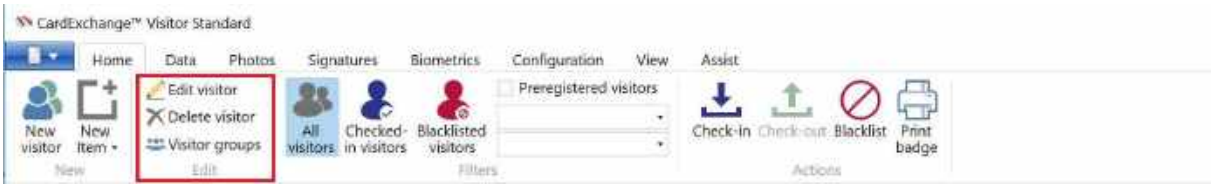
5.2.2.3 Layout



Under the Layout section of the ribbon it is possible to edit the column attributes, as well as the look-up columns and detail columns that are displayed.

5.2.3 Edit



In the Edit section you have options to Edit visitor 160, Delete visitor 161 and Visitor groups 141.

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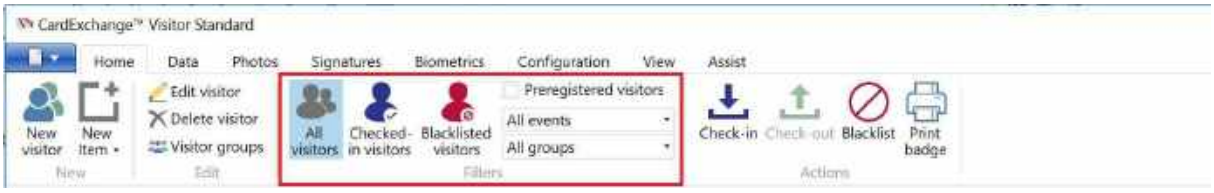
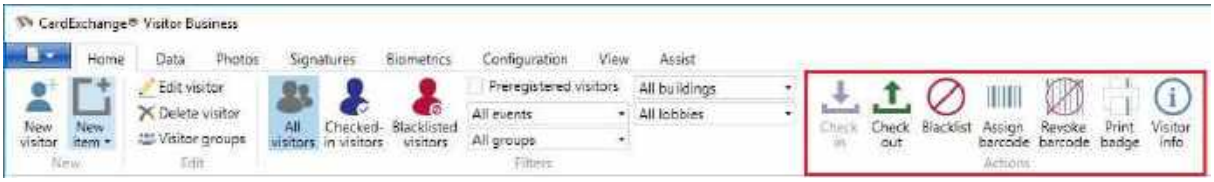
5.2.4 Filters



The filters section allows you to filter the list of visitors that is shown in the visitors pane. The following filters are available and can be used in combination with each other:

All visitors	This is the default option and shows all visitors in the database
Checked-in visitors	Shows all visitors currently checked-in
Blacklisted visitors	Shows all visitors that have been flagged as blacklisted
Preregistered visitors	When checked only Preregistered visitors will show
Events	Select from the available events to only show those visitors (The default is all events)
Groups	Select from the available groups to only show those visitors (The default is all groups)

5.2.5 Actions



The actions section allows

Check-in	Clicking Check-in will directly check-in the selected visitor(s).
Check-out	Clicking Check-out will directly check-out the selected visitor(s).
Blacklist	Clicking Blacklist will add the selected visitor(s) to the blacklist to prevent them from being able to be checked in.
Assign barcode	Assign a personal barcode to the selected visitor, more information on personal barcodes can be found here.
Revoke barcode	Revoke the personal barcode for the selected visitor.
Print badge	Clicking Print badge will print the visitor badge for the selected visitor(s).

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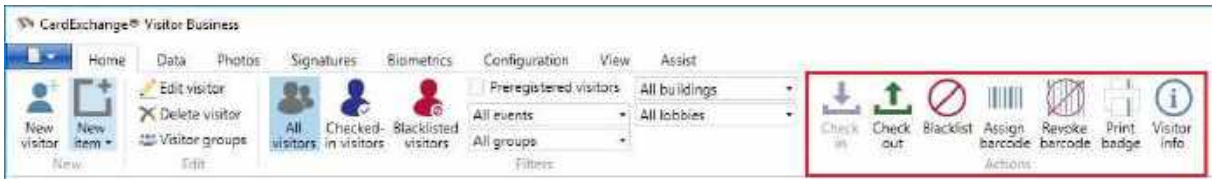
Visitor info Displays information for the selected visitor.

5.2.6 Using Personal Barcodes

Starting from the Standard edition of CardExchange® Visitor, it is possible to assign a personal barcode to a visitor which can be used as well as the Invitee barocde that is auto-generated.

Using the invitee barcode you can only check in once for a planned event.
Using a personal barcode will allow you to check-in for a planned event if there is one available at that time, and check-in incidentally otherwise.

The invitee barcode is generated automatically when creating the invitee, the personal barcode needs to be assigned.
You can assign a personal barcode by clicking on the Assing barcode button in the ribbon of the home tab.



Clicking on assign barcode will give you the following options:

You can scan an existing barcode to assign it to the selected visitor.
You can let CardExchange® Visitor generate a random value.
Or you can use the contents of an existing database column for the barcode value.

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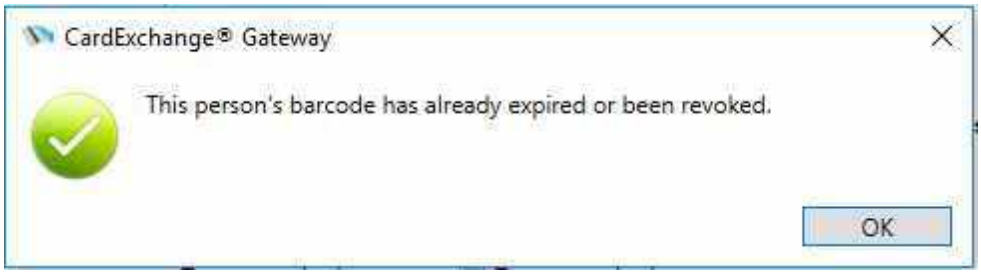
Under advanced options you can control exactly is allowed. If incidental check-ins are not allowed, the personal barcode will only work for planned events.

Both barcodes can be used in the same way.
That is, the system looks up both the Person and the Invitee table when confronted with a bar code

Clicking on Revoke barcode will give you the option to revoke the barcode so that it cannot be used any longer.



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5.2.7 Visitor info

Clicking on Visitor info displays information for the selected visitor regarding their visit.

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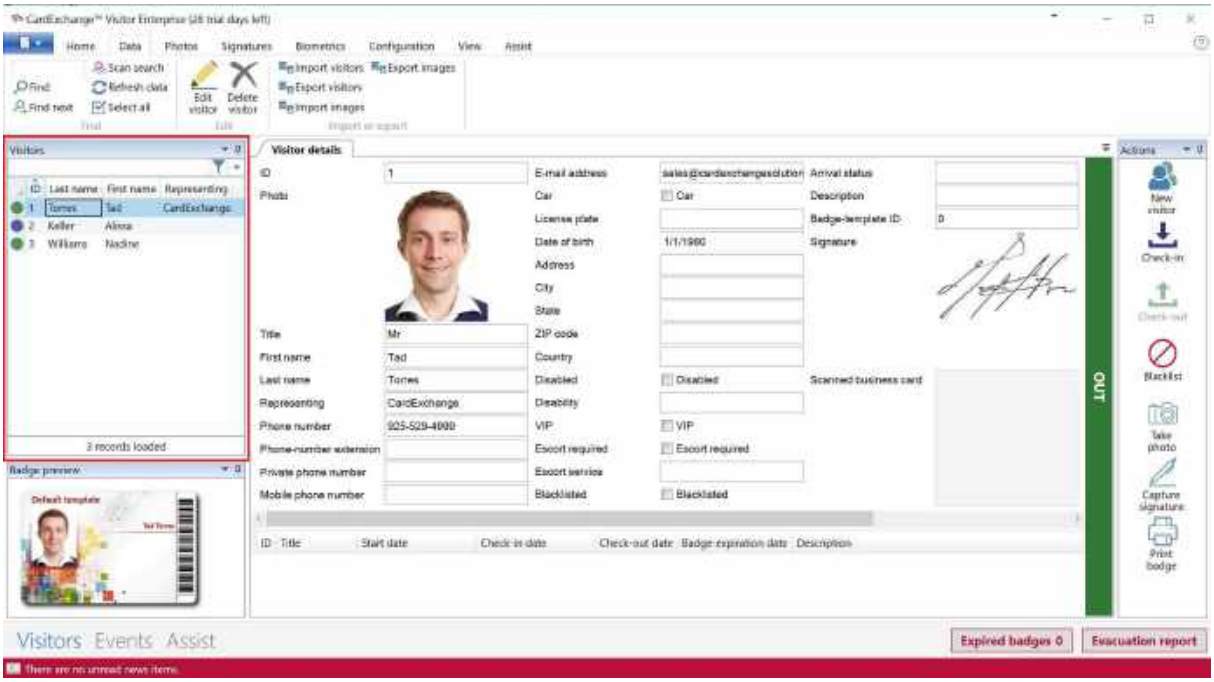
5.3 Data

Viewing and Managing data from the database is very important, CardExchange® Visitor offers many ways to look up data, enrich data, view data, etc.

In this section of the Help file we will go over all the functionality available like searching for and editing visitors, etc.

5.3.1 Record Lookup



The simplest way of searching for the correct record is to use the Visitors pane 130 that is displayed at the left-hand side of the main window.
You can use the scroll bar to scroll through the list to find the correct record and then select it by clicking.

The Visitors pane 130 may be sorted in various ways and is not necessarily alphabetical. You must take this into account when searching for a record.

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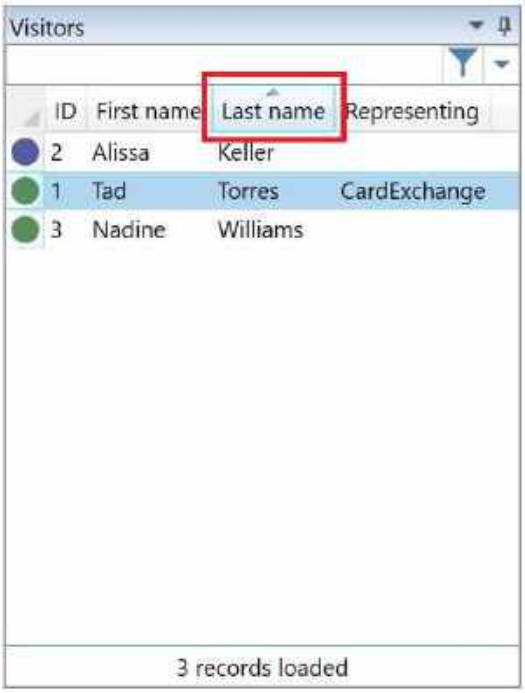
In the Visitors pane of CardExchange® Visitor you see all the records presented that are available in the database. In the configuration tab you can set the Look-up columns that are displayed in the Visitors pane.

Record Sorting



The Visitors pane is a so called data grid showing all your available database records divided by columns. Sorting the records is just as simple as clicking on the column.

Record Look Up

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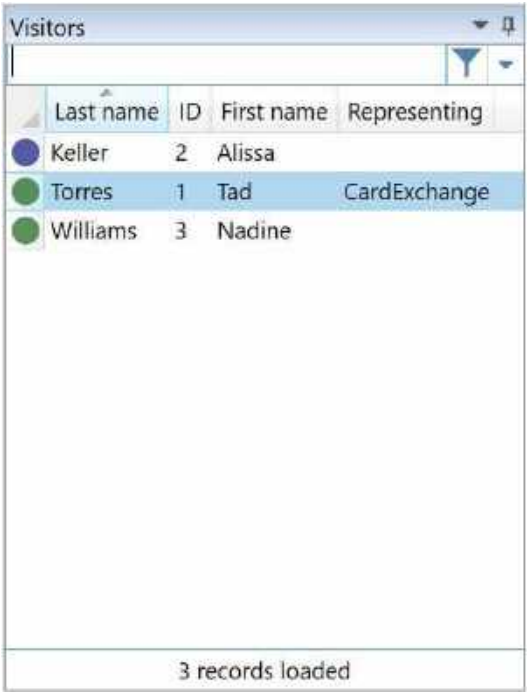
It is very simple to search for records inside the Visitors pane. Enter the text that you want to search for in the text box directly above the columns.

Loaded Record Information



In the footer of the Visitors pane the total amount of loaded records is shown.

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You will notice that this method becomes less attractive if the list is very long and that you need a more directed manner of finding the correct data. The following alternative find methods are available:

- Finding names using the **Find section** in the **Data** tab,
- Finding names using the **Keyboard**
- Finding names using the Database Filters

The first two methods will be explained in the following sections. For an explanation of the database filters, please refer to the section Filters 149 of this Help file.

5.3.1.1 Using Find

In the **Find** section of the Data tab you can find the functionality **Find**. If you select this option, you enter a dialog window in which you can enter a combination of letters or digits to search on (only alphanumeric characters).

If you then click OK, the first element from the list of names that contains the requested combination is selected.

If the first match is not the one you are looking for, you can **search** on the same combination by clicking the **Find next** button in the **Find** section of the Data tab. You can repeat this until you have found the correct person.

The advantage of searching in this way is that the text you enter does not need to be at the start of an element in the events pane. The search does not make a distinction between uppercase and lowercase characters.

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With this **Find** function, all elements in the Visitors pane 130 remain visible. Any restrictions to the number of records that are displayed, which would normally apply as a result of what you have entered in the text field, are overruled.

5.3.1.2 Using Keyboard

The **find** functions that have been discussed in the section Using Find 156 are also available from the keyboard. You can display the window Find by simultaneously pressing the **control key** and the letter **f**. You can repeat the search as often as is required to find the correct person by pressing the **F3** function key.

5.3.1.3 Refresh Data

It is possible that you cannot find the intended record because it has only just been entered into the database. The details of the record in question have already been entered into the database, but CardExchange® Visitor has not yet, as it were, seen it. You can solve this problem by selecting the **Refresh data** option in the Find section (or by pressing the **F5** function key). CardExchange® Visitor will retrieve the list of records from the database again.

Doing this ensures that the most recent data for the record concerned is displayed.

5.3.1.4 Scan Search

It is also possible to search for records by scanning their ID, simple click on Scan search and present their ID to be scanned into the ID scanner.
If a match is found in the database their record will be selected in the Visitors pane and their details displayed in the Visitor details pane, if not you will have the option to add the visitor.

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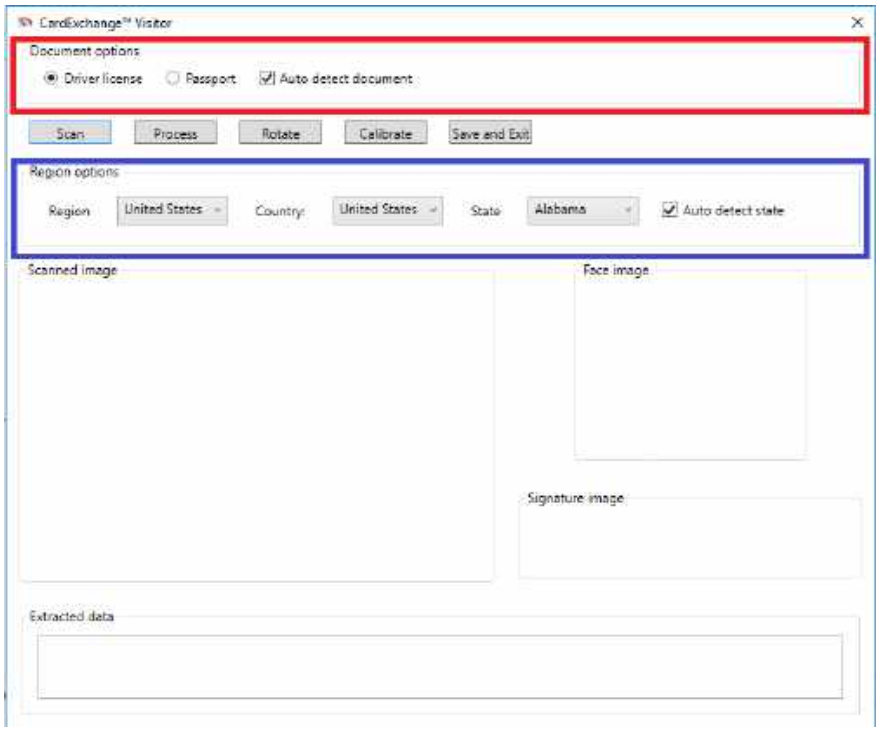
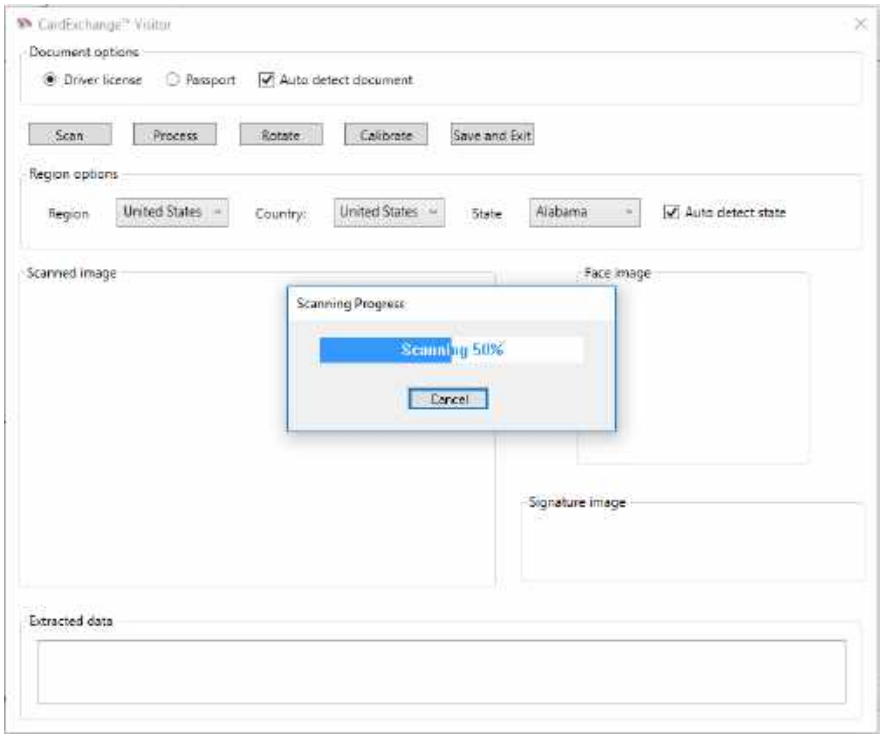


After clicking Scan search the ID scan dialog will show, simply confirm the Document options highlighted in red and the region options highlighted in blue then click Scan.



Once scanning has completed the dialog will close.

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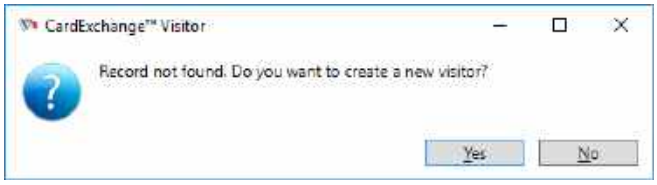
If a match is found then the visitor will be selected in the Visitors pane and their details shown in the Visitor details pane.



If no match is found then you will be asked if you want to create a new visitor.

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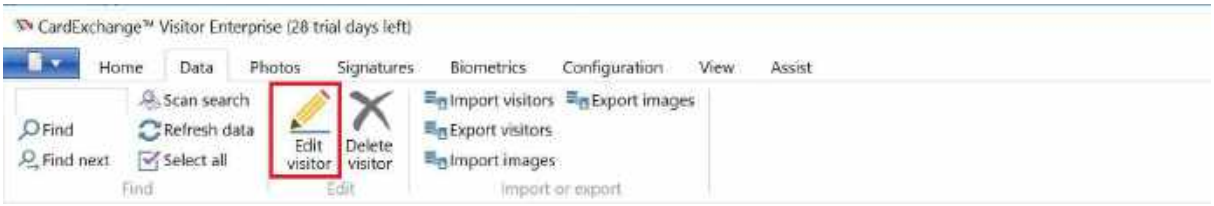
Clicking yes will add the new visitor and select them in the Visitors pane.

5.3.2 Editing Visitor's



Visitor details can be edited in four steps:

- First select the visitor from the Visitors pane that you wish to edit.
- Then either click on Edit visitor from either the Data tab or the Home tab.
- Click on the field you want to edit and change it. Instead of using the mouse, you can also use the Tab key to move through the desired fields. The buttons **Save** and **Cancel** will be enabled as soon as you start typing.
- Click on the **Save** button to save the data into the database, or on the **Cancel** button if you do not want that.

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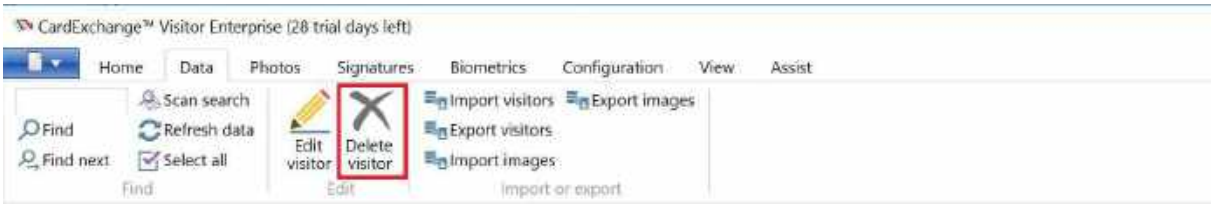
If you clicked on Edit visitor by accident, or you decided that a change was not required you can simply click on the Back button.

5.3.3 Deleting Visitor's



A database record can be deleted in three steps:

- First select the visitor from the Visitors pane that you wish to delete.
- Then either click on Delete visitor from either the Data tab or the Home tab.
- Say **Yes** to the question if you really want to delete the record. Say **No** if you do not want that.

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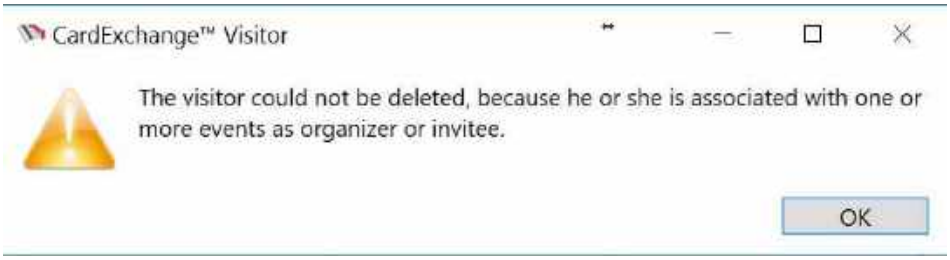
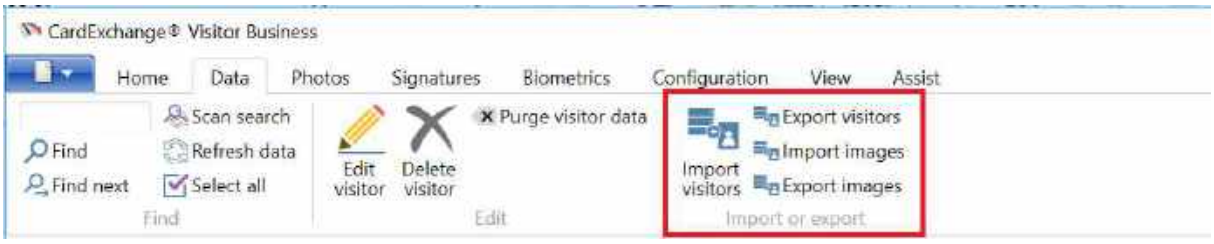


Visitors can only be deleted if they have not been checked-in, once they have been checked-in or assigned to an event they cannot be deleted.
If you try to delete a visitor that has already been checked-in or assigned to an event you will get the above message.

5.3.4 Purge Visitor's Data

Clicking on Purge visitor data will manually purge the personal information from all selected visitors
Please note that this process cannot be undone.

5.3.5 Import or Export



CardExchange® Visitor offers the possibility to import and export visitors as well as images such as photos/signatures.

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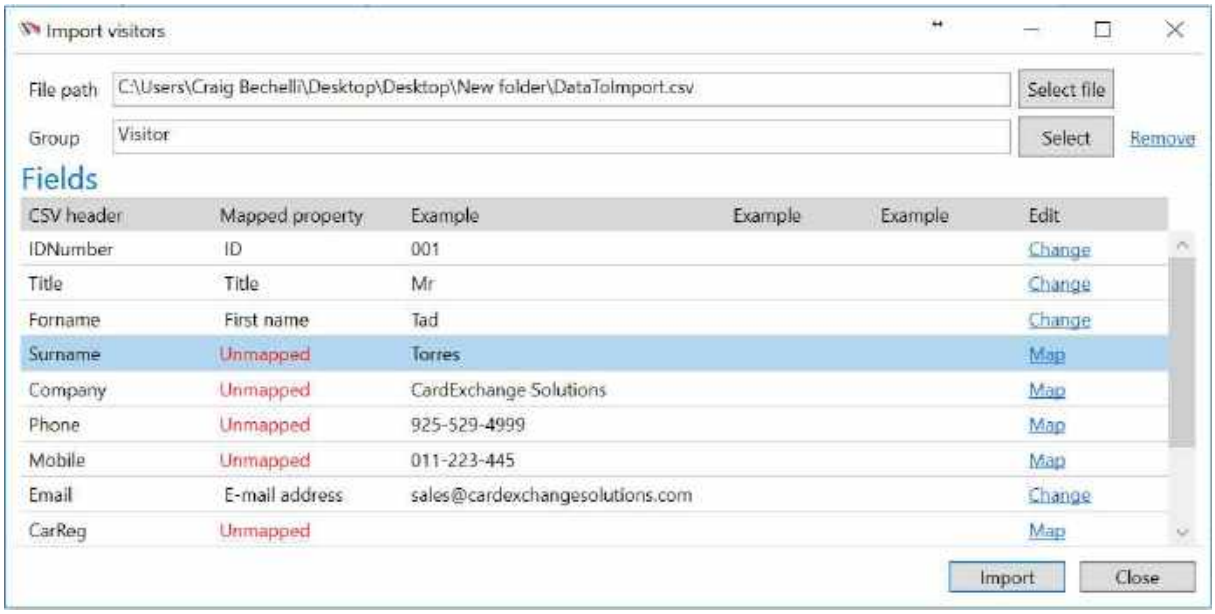
5.3.5.1 Importing Visitors



When clicking on Import visitors you will be prompted to select the location for the csv file to be imported from, you also have the option to select one of the defined groups to import the records into.
Once you have selected the file, any matching column headers found in the csv file will be mapped to the corresponding fields in the database. You will also see examples from the first entry in the csv file so you can make sure the data is matched to the correct columns. Any column names that do not match those withing the CardExchange® Visitor database will show as unmapped, you can then click on map to choose the desired column to map them to.

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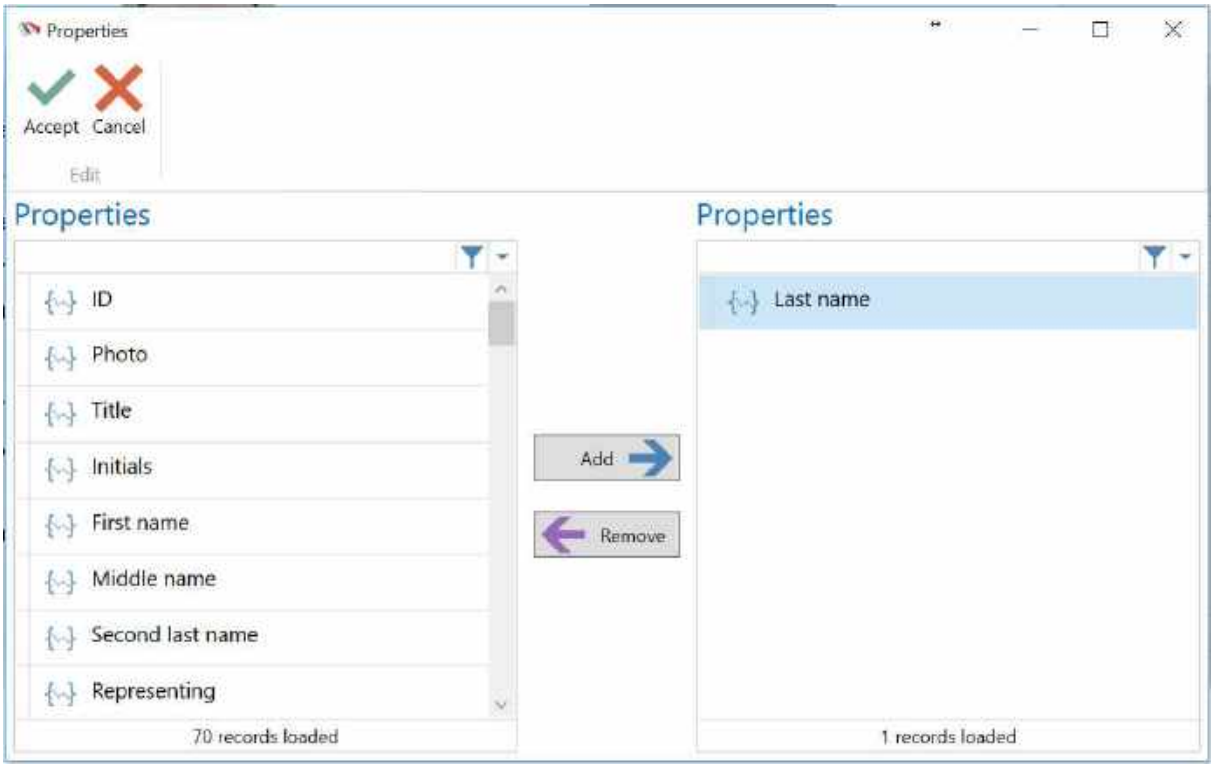
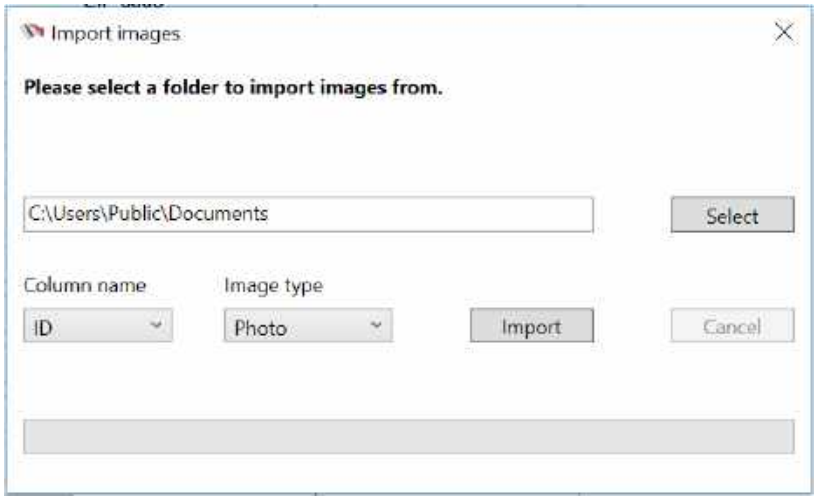


Simply select the desired field from the database and click on add to map the csv column to this field.

5.3.5.2 Importing Images



When clicking on Import images you can choose the location to import the images from. You can choose the column name to use as the reference/name of the images and you can choose the image type. Below are the images that can be imported:

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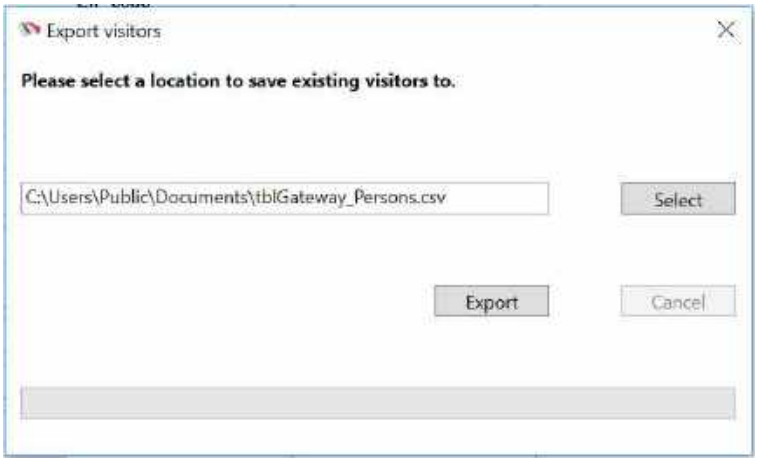
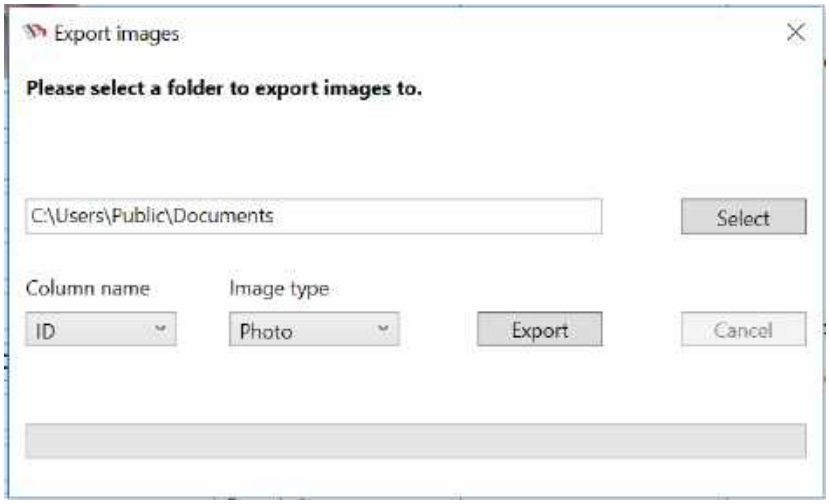
- Photo
- Signature
- Fingerprint
- Business Card
- Driver's License

5.3.5.3 Exporting Visitors



When clicking on Export visitors you will be prompted to select the location for the csv file to be saved, clicking on export will then export all of the records into the csv.

5.3.5.4 Exporting Images



When clicking on Export images you can choose the location to export the images too, images are exported in the .jpg file format.
You can choose the column name to use as the reference/name of the images and you can choose the image type. Below are the images available to export:

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- Photo
- Signature
- Fingerprint
- Business Card
- Driver's License

5.4 Photos

In this section of the help file you can find all the information of how to use photos with CardExchange® Visitor.

5.4.1 Options

Under the options section there are three options depending on your edition.

Use image editor	Automatically display the image editor after capturing the photo
Ask for confirmation	Ask for confirmation before storing the captured photo
Use FaceFind	Use the FaceFind option automatically crop the photo to the persons face

FaceFind is only available from the CardExchange® Visitor Standard edition.

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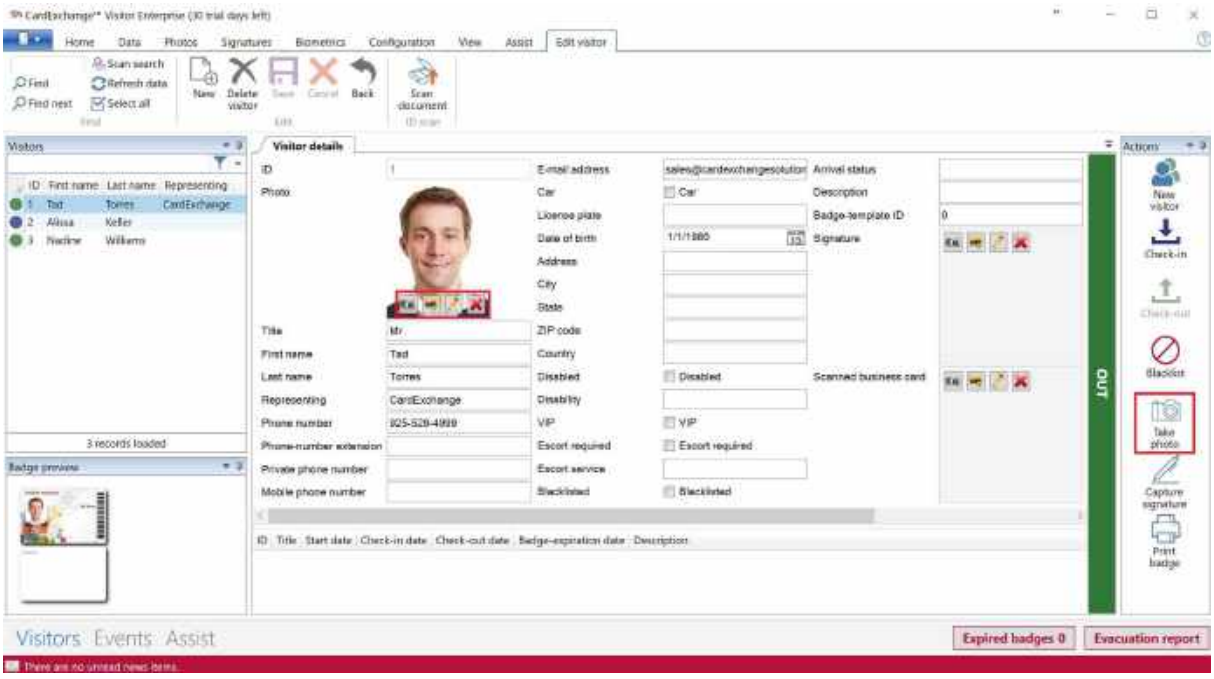
5.4.2 Take Photos

When you have selected the correct record, you can add a photo of the person to the database, or, if you want, replace the existing photo. This function is accessible in the following ways.

- Click **Take photo** button in the photos tab of the ribbon,
- Click **Take photo** button in the Actions pane,
- Click on the **Take photo** icon when adding/editing a visitor.



After you have taken the photo, you will enter the Image Editor window of CardExchange® Visitor, ImageExchange®.

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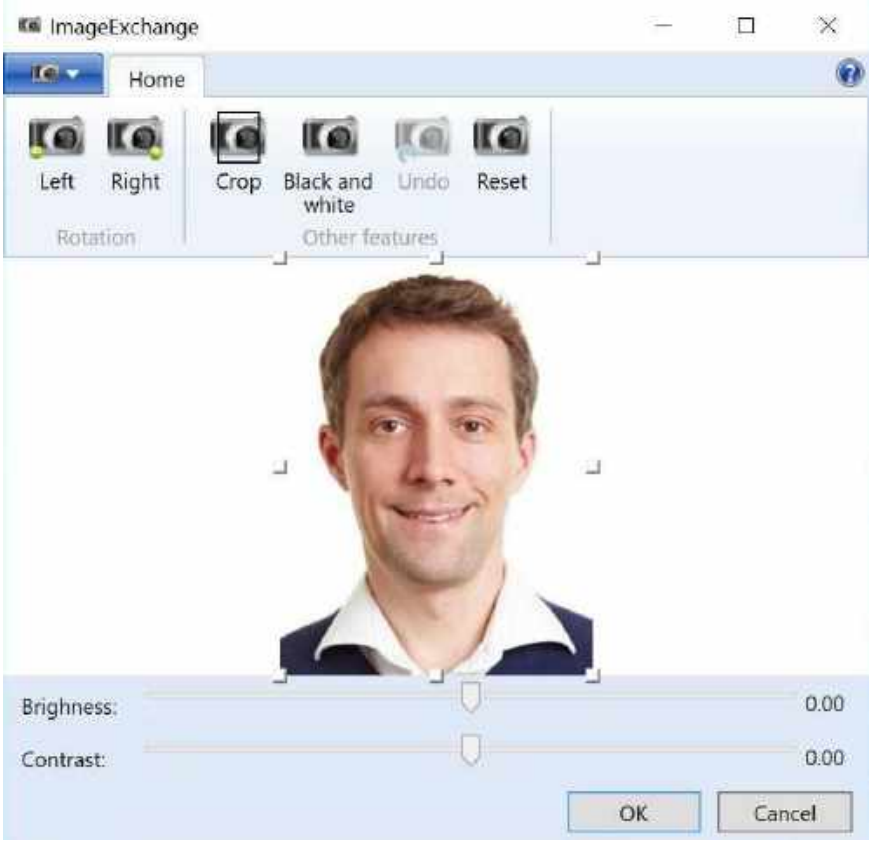

Please see the Using Image Tools 179 section of this Help file for more information about using the ImageExchange® Image Editor.

If you click on the OK button, the photo will be automatically cropped and the Image Editor will be closed. If a photo was already available in the database, CardExchange® Visitor asks whether you want to update it. If you click Cancel, the original photo will be restored on the print preview. You can disable this option in the Photo tab by unchecking the Use Image Editor check box.

5.4.2.1 PhotoExchange

When taking a photo the PhotoExchange window will be shown to handle the acquisition of the image from the connected camera.
PhotoExchange is a separate utility where you can manage the connected camera, camera settings and view a preview of the image to be captured.

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The Preview tabs shows a live preview from the selected camera.

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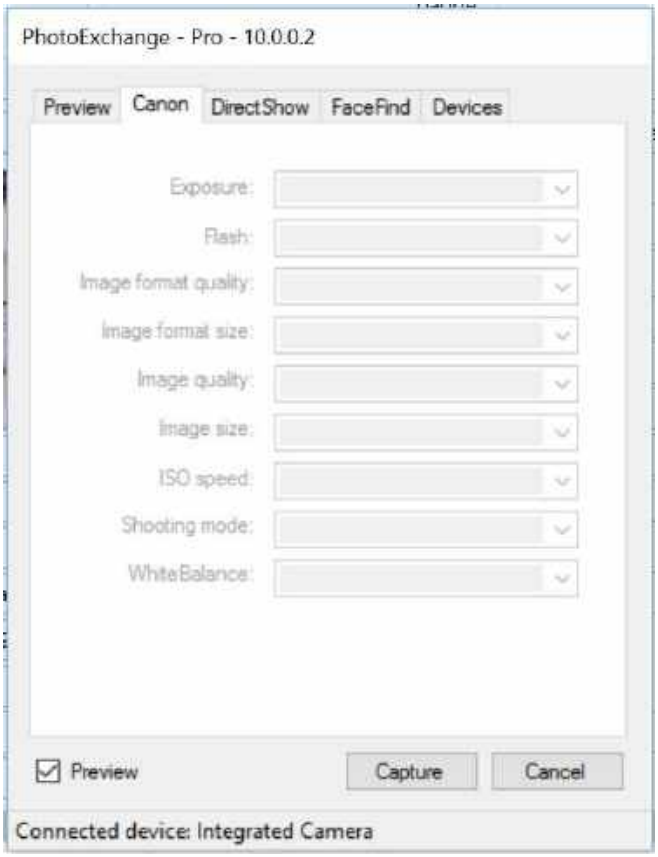

If you are using a supported Canon camera then then some of, or all of the options under the Canon tab will be available depending on the camera model.

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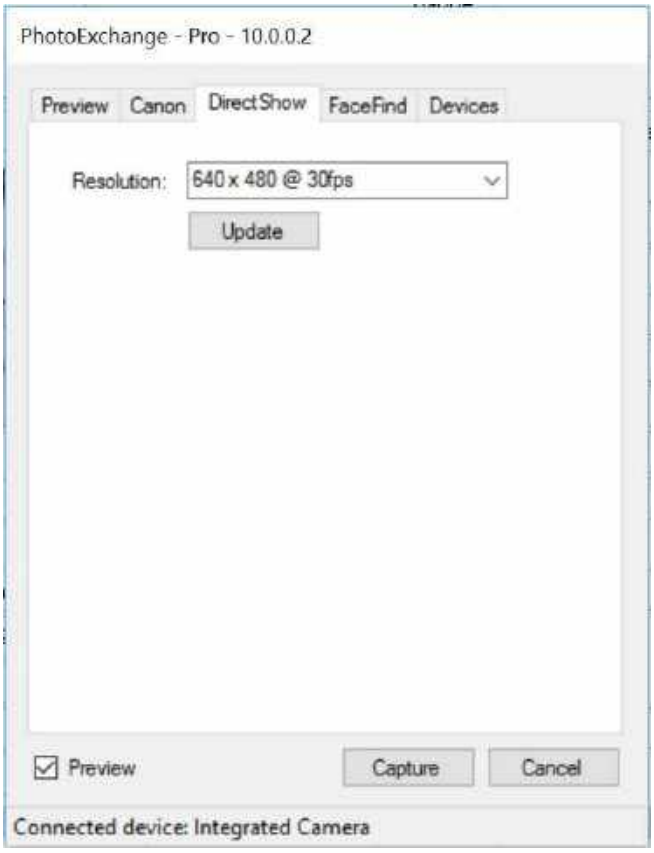

The Direct Show tab shows the settings for any Direct Show device such as webcams

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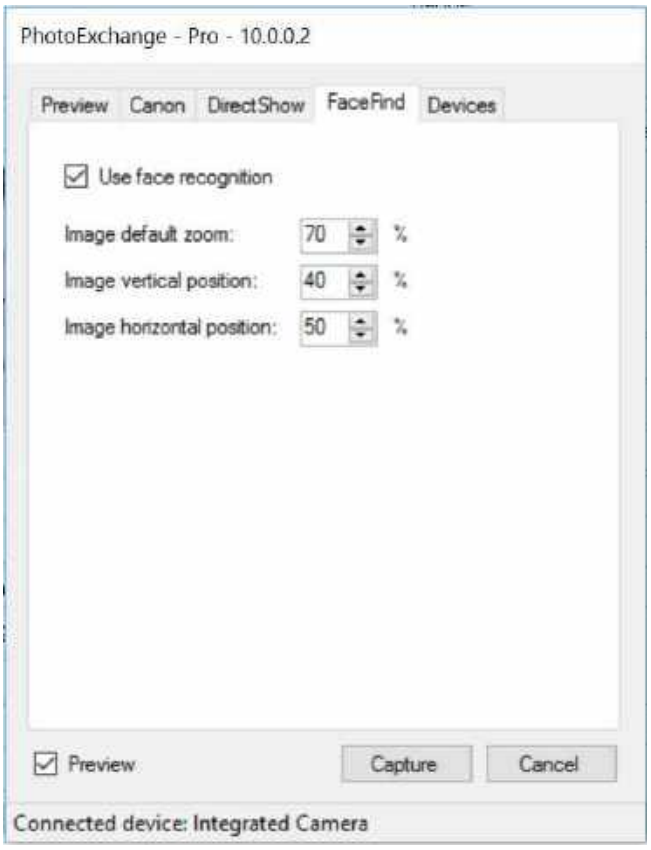

Under the FaceFind tab you can enable/disable automatic face recognition and cropping, you can also change some settings relating to zoom and position.

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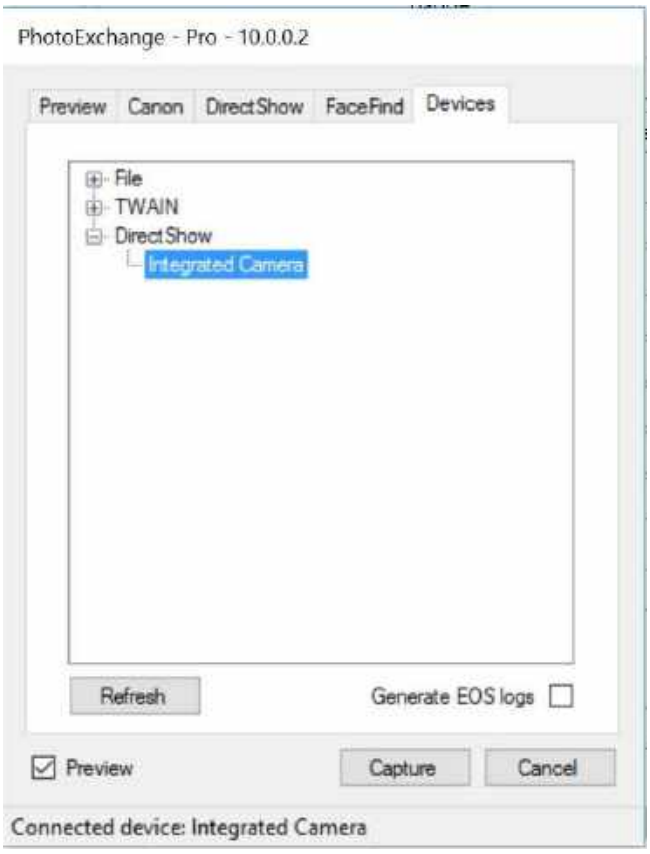

And under the Devices tab you can select the connected device.

5.4.3 Import Photos

It is possible that you do not want to take a photo of someone because you already have his/her photo. If this photo is in one of the usual formats (bitmap, jpeg, png, etc.), you can use the **Import photo** function indicated to import it and store it for the selected record in CardExchange® Visitor.

This function is accessible in the following ways.

- Click **Import photo** button in the photos tab of the ribbon,
- Click on the **Import photo** icon when adding/editing a visitor.

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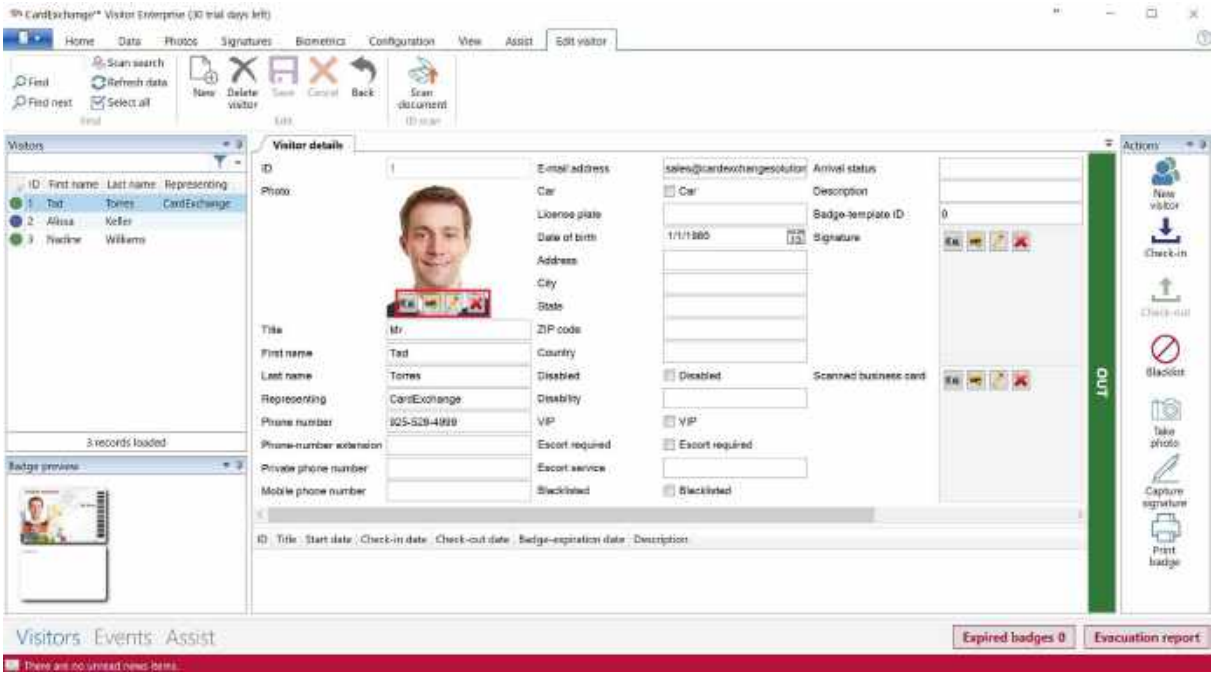
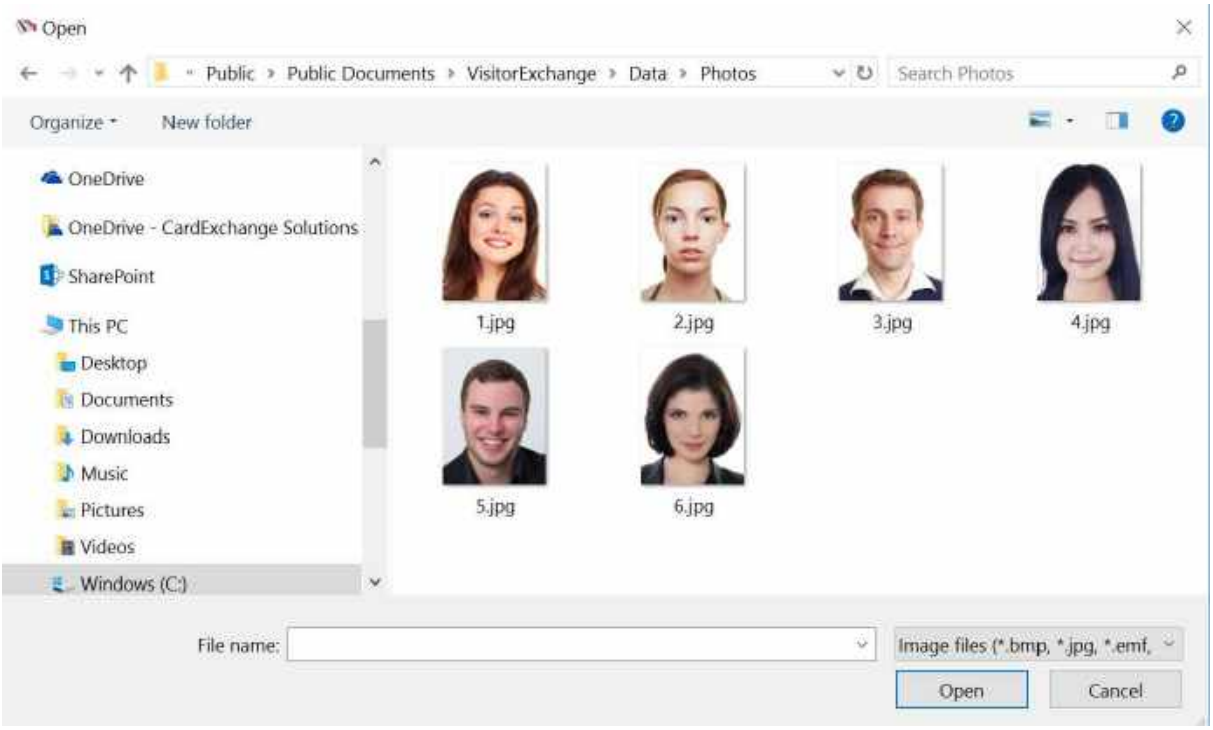


If you click **Import photo**, you enter a dialog window that allows you to select the photo file.



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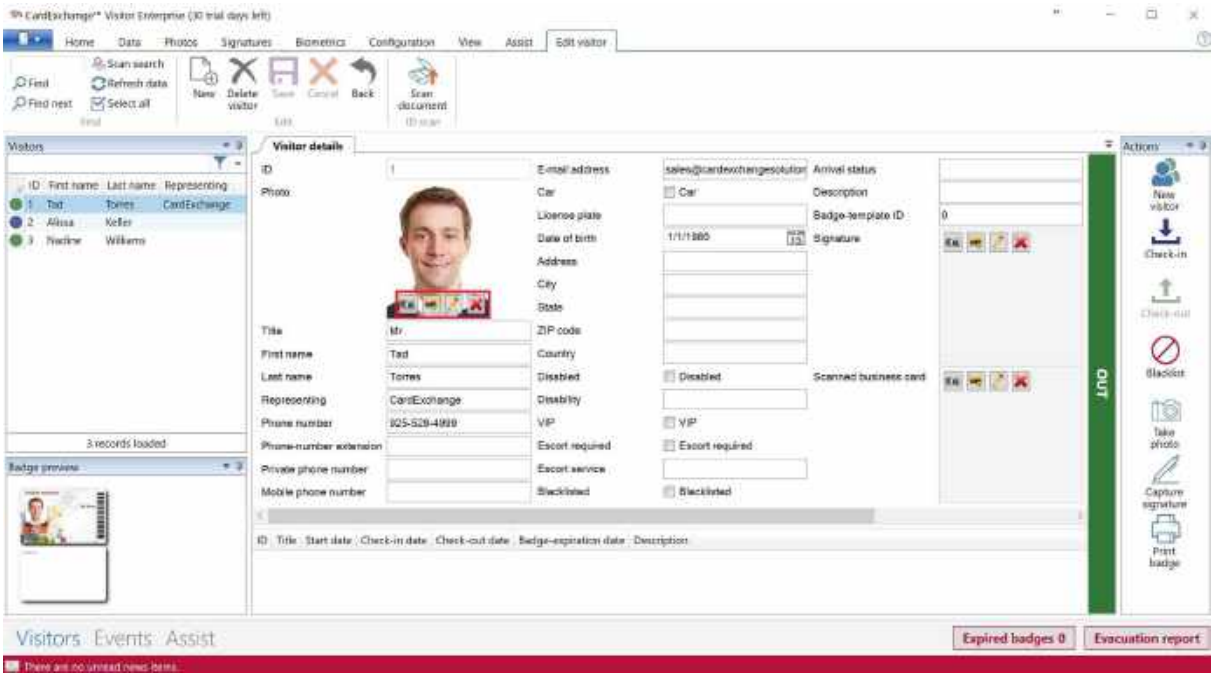
If you have found and selected the file, click **Open** and the photo will be displayed in the Image Editor 179 window. Here you can crop the photo to the right size and perform any other editing operations.

5.4.4 Edit Photos

Photos that were taken earlier can be edited using Image Editor. This function is accessible in the following ways.

- Click **Edit photo** button under the photos tab of the ribbon,
- Click on the **Edit photo** icon when adding/editing a visitor.



After clicking on edit image you will enter the Image Editor window of CardExchange® Visitor, ImageExchange®.

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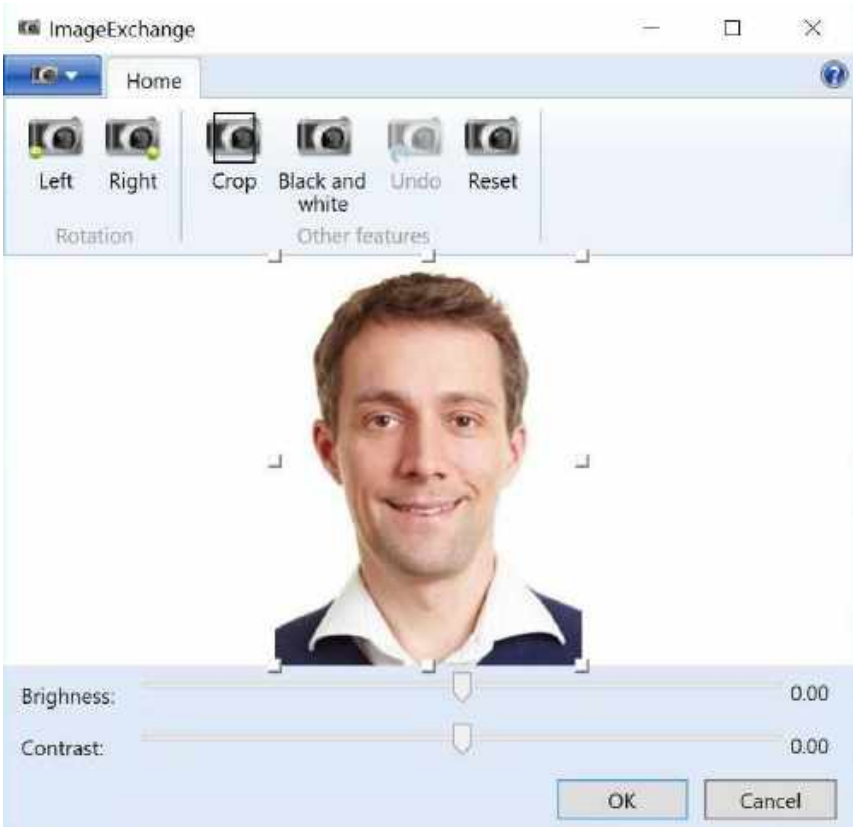

Please see the Using Image Tools 179 section of this Help file for more information about using the ImageExchange® Image Editor.

If you click on the **OK** button, the photo will be automatically cropped and the Image Editor will be closed. If a photo was already available in the database, CardExchange® Visitor asks whether you want to update it. If you click **Cancel**, the original photo will be restored on the print preview. You can disable this option in the Photo tab by unchecking the Use Image Editor check box.

5.4.5 Export Photos

The opposite to import photo is also possible. You can export an existing photo from the database to a file. To do this, click the **Export photo** button indicated in the **Actions**

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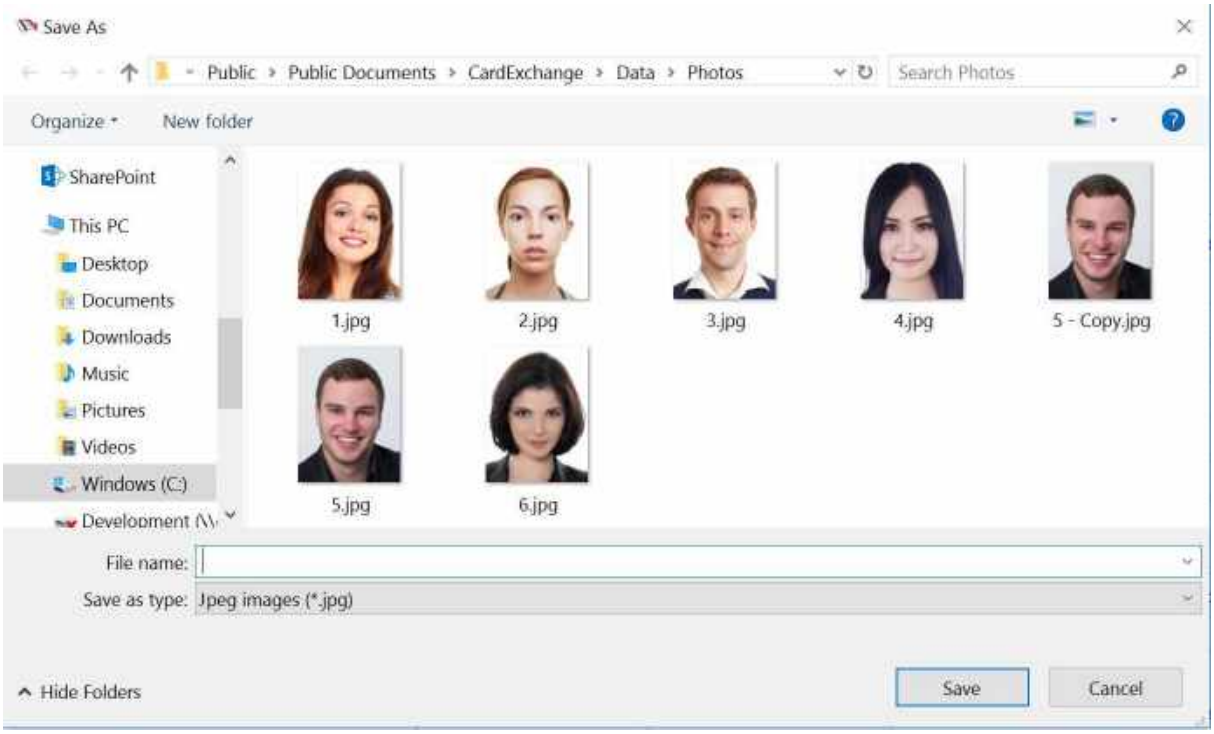
section. Once more a dialog window will be displayed in which you can specify the name and location of the file that must contain the photo.



You can choose the following supported file formats: **Bitmap**, **jpg**, **emf**, **gif**, **png**, and **tiff**.

Click on **Save** and the photo is exported to the selected location.

5.4.6 Remove Photos

Photos can be removed from the database by clicking the **Remove photo** button from the **Actions** section indicated. The user will be asked to confirm the remove operation with the following question.

This function is also accessible by clicking on the **Remove photo** icon when adding/editing a visitor.

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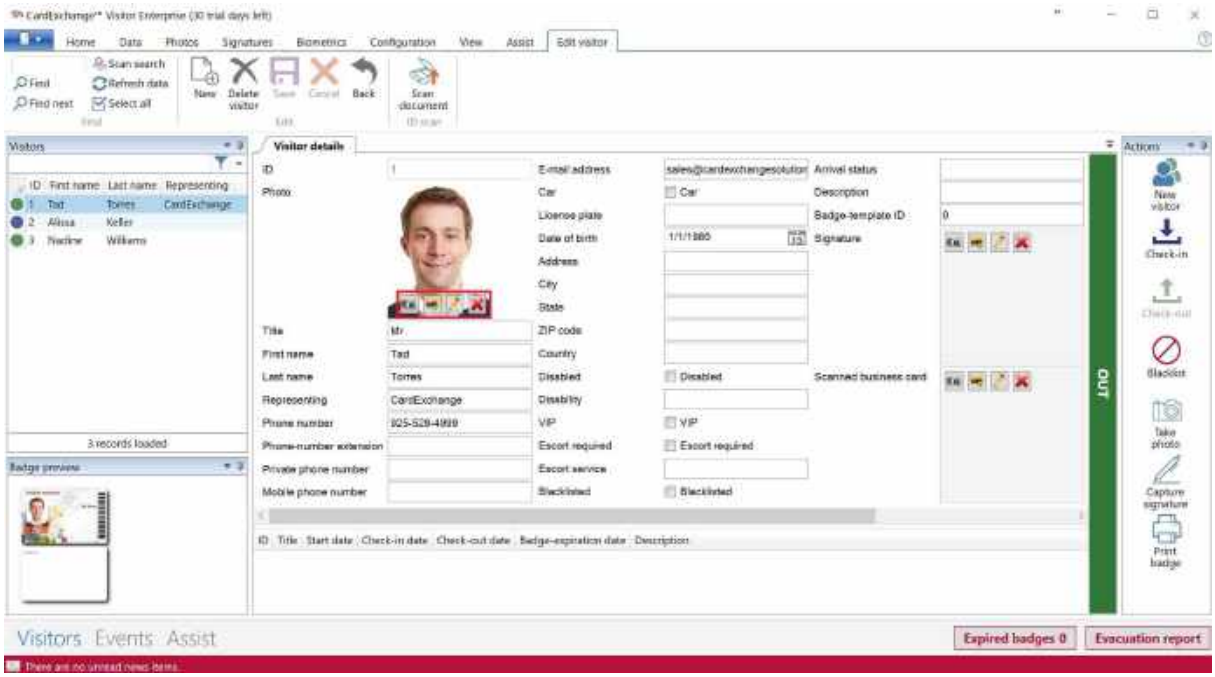

When you click **Yes**, the photo will be removed from the database.

5.4.7 Copy and Paste

The **Actions - Copy photo** option allows you to copy the photo displayed to the photo clipboard of CardExchange® Visitor. You can then choose another record and, by using the **Paste photo** option, link the photo on the clipboard to the selected record.

This function can be handy if the same record must be entered under a different name or company in the database. You do not need to take a new photo. As long as you do not

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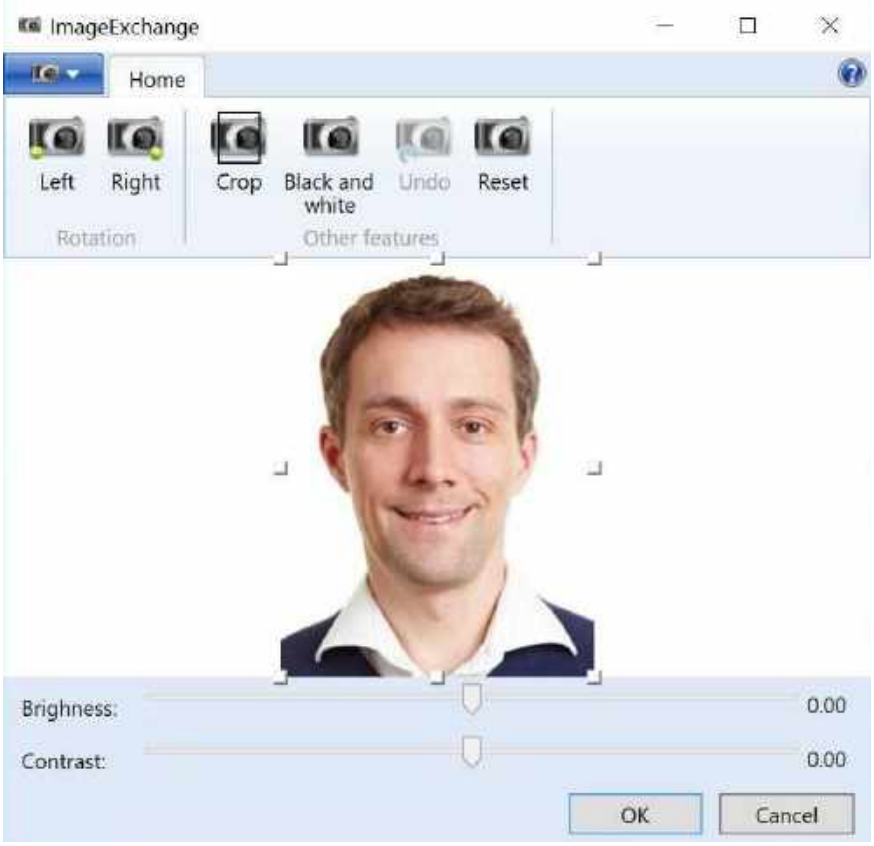
copy another photo and do not shut down CardExchange® Visitor, the copied photo will remain on the clipboard.

5.4.8 Using Image Editor



CardExchange® Visitor offers for all editions an Image Editor tool, ImageExchange®. The ImageExchange® tool offers some interesting functionality to help you upscale your photos or images.

When you **take a photo** or **capture a signature** and the **Use Image Editor** option is checked, this ImageExchange® tool will open. It also opens if you click on the **Edit photo** button.

ImageExchange® has functionality available via the File menu and the ribbon.

The File Menu

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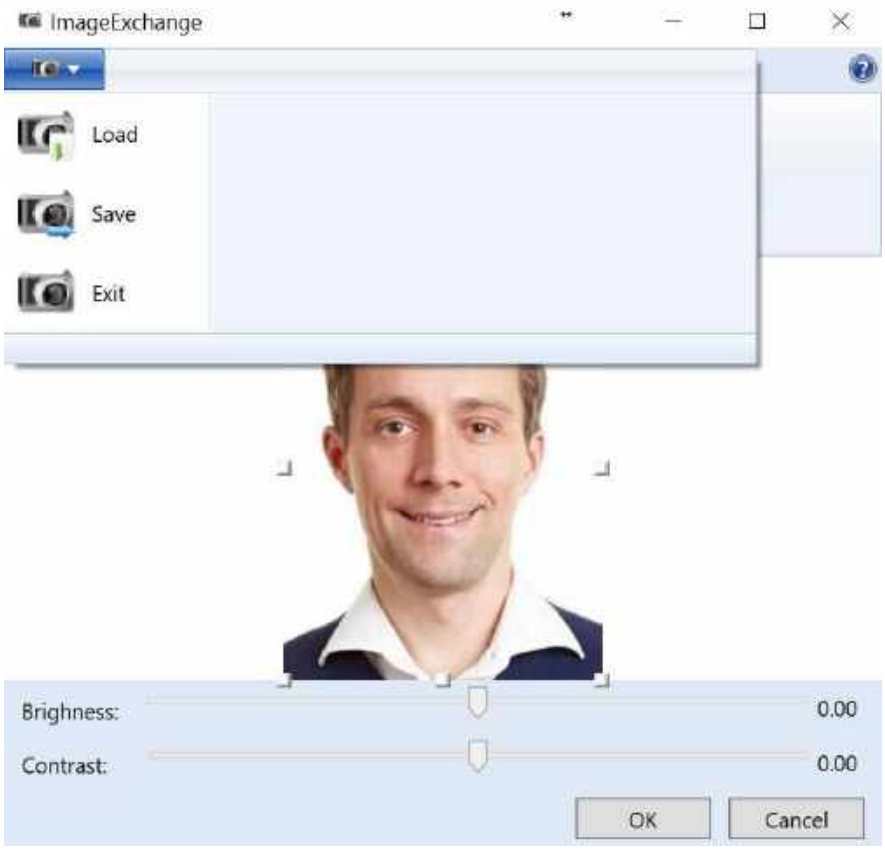
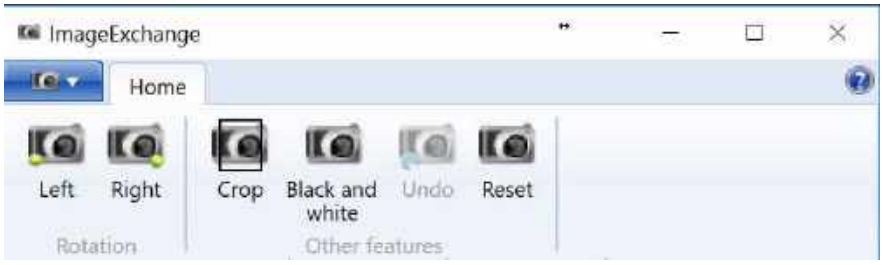


When you take a photo, capture a signature, etc., the image will be automatically be show in the ImageExchange® tool. It is also possible to Load another image via the **Load** function in the **File menu**.

When the image is edited and you click on **OK**, the image will be saved automatically. If you want to store the image to another location just click on **Save** and select the destination in the **File Explorer** and click on **Save**.

Exit just closes the ImageExchange® tool without saving and works as the **Cancel** button.

Overview of the Ribbon



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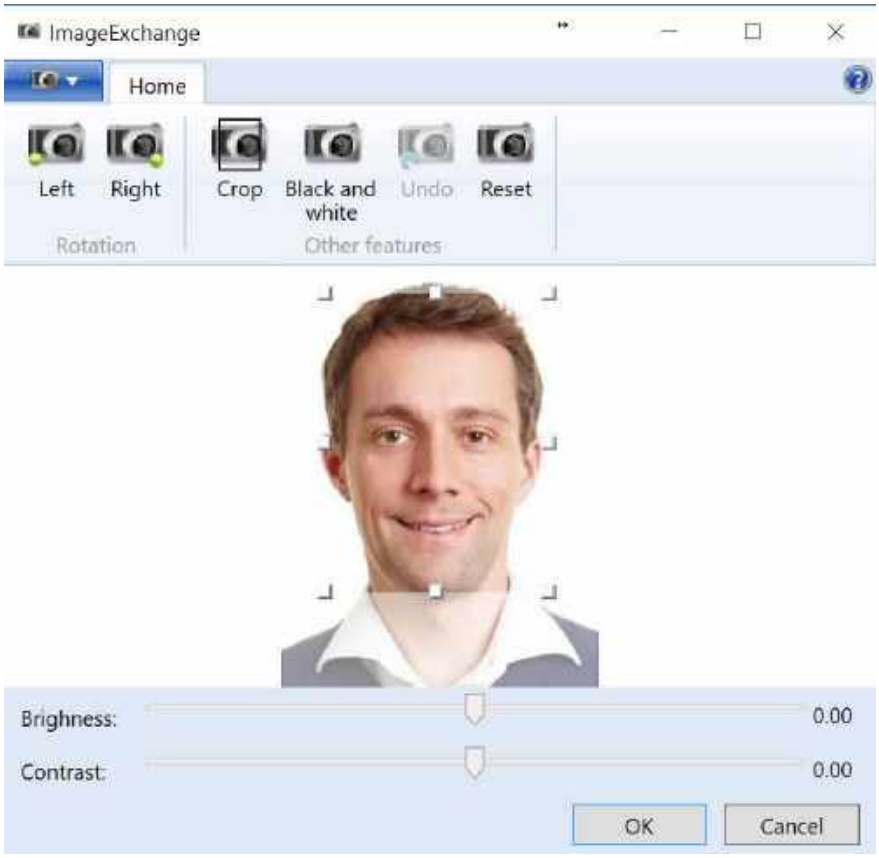
When the image is loaded, you can apply some standard functionality to it. If the image needs to be rotated, just click on the Left or Right buttons in the Rotation section.

You can also crop the loaded image when you have adjusted the size.



When you move the rectangle to required size, and you click on **Crop**, the image will be cropped according to the settings made.

When you click on the **Black and white** button, the whole image is converted to Black and White and of course you can undo all your settings by clicking on the **Undo** button or click on **Reset** to go back to the original loaded image.

Brightness and Contrast

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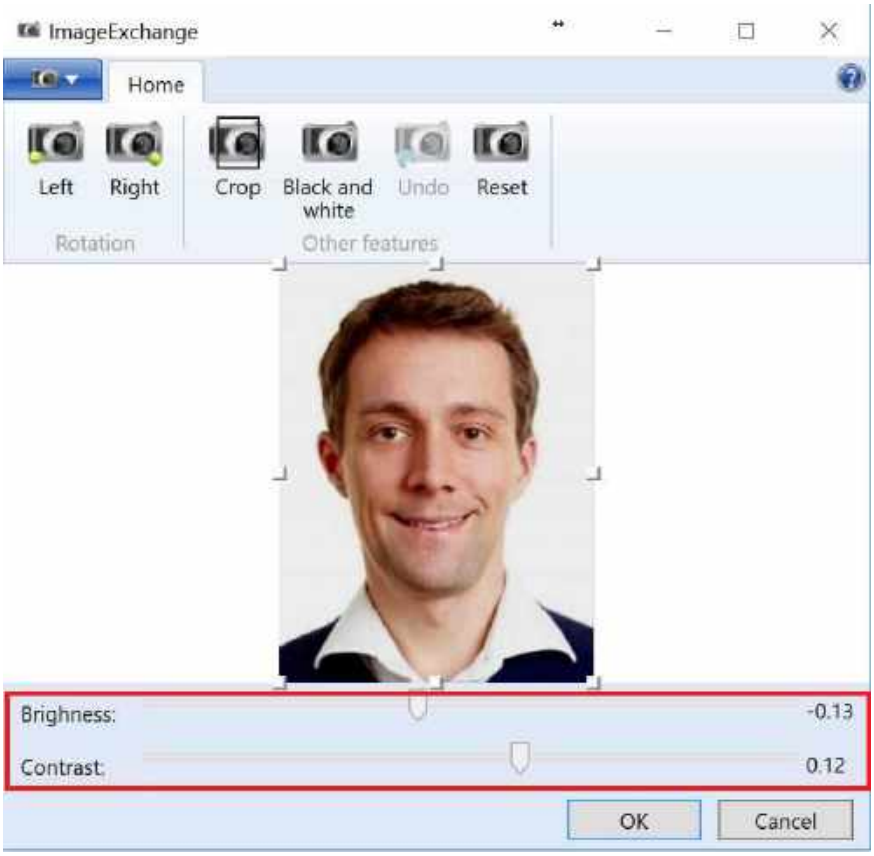

Move the sliders indicated to change the **Brightness** and/or **Contrast** of the loaded image.

Click on **OK** to store the image or click on **Cancel**.

5.5 Signatures

IMPORTANT! Signatures are supported starting from Standard and higher editions!

In this section of the help file you can find all the information of how to use signatures with CardExchange® Visitor.

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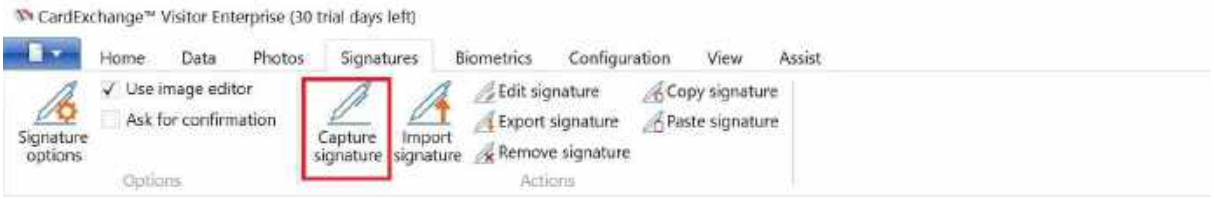
5.5.1 Capture Signatures



When you have selected the correct record, you can add a signature of the person to the database, or, if you want, replace the existing signature. This function is accessible in the following ways.

- Click **Capture signature** button in the ribbon as indicated,
- Click **Capture signature** button in the actions pane,
- Click on the **Capture signature** icon when adding/editing a visitor.

After you have captured the signature , you will enter the Image Editor window of CardExchange® Visitor, ImageExchange®.

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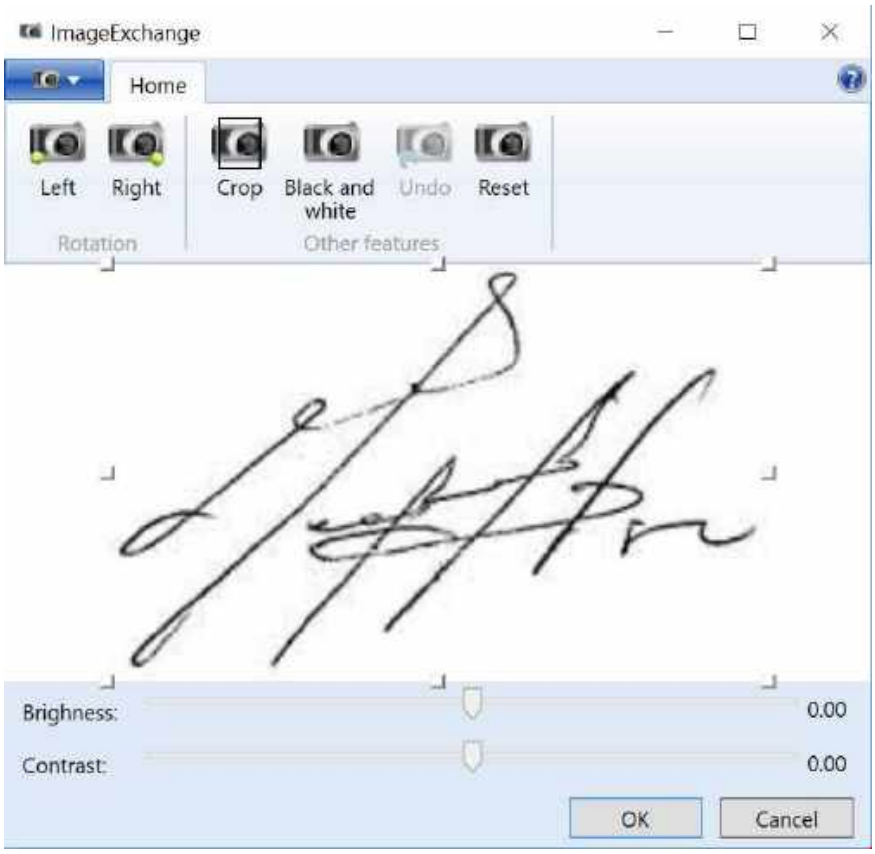

Please see the Using Image Tools 179 section of this Help file for more information about using this ImageExchange® Image Editor.

If you click on the OK button, the signature will be automatically cropped and the Image Editor will be closed. If a signature was already available in the database, CardExchange® Visitor asks whether you want to update it. If you click Cancel, the original signature will be restored on the print preview. You can disable this option in the Signature tab by unchecking the Use Image Editor check box.

5.5.2 Edit Signatures

Signatures that were captured earlier can be edited using Image Editor. This function is accessible in the following ways.

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- Click **Edit signature** button in the ribbon as indicated,
- Click on the **Edit signature** icon when adding/editing a visitor.

After clicking on Edit signature, you will enter the Image Editor window of CardExchange® Visitor, ImageExchange®.

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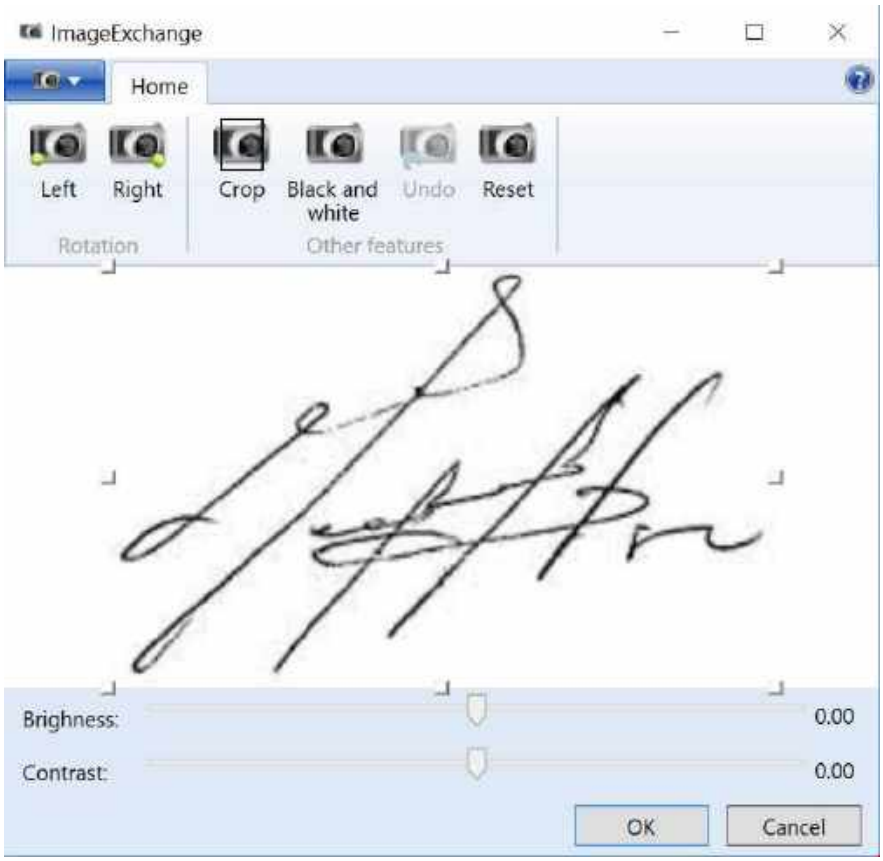

Please see the Using Image Tools 179 section of this Help file for more information about using the ImageExchange® Image Editor.

If you click on the **OK** button, the signature will be automatically cropped and the Image Editor will be closed. If a signature was already available in the database, CardExchange® Visitor asks whether you want to update it. If you click **Cancel**, the original signature will be restored on the print preview. You can disable this option in the Signature tab by unchecking the Use Image Editor check box.

5.5.3 Copy and Paste

The **Actions - Copy signature** option allows you to copy the signature displayed to the signature clipboard of CardExchange® Visitor. You can then choose another record and, by

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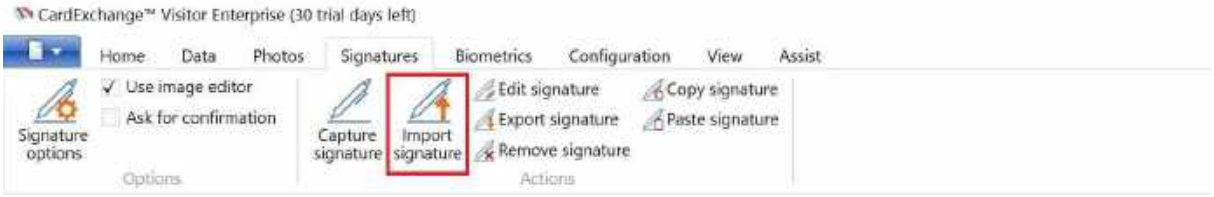
using the **Paste signature** option, link the signature on the clipboard to the selected record.

This function can be handy if the same record must be entered under a different name or company in the database. You do not need to capture a new signature. As long as you do not copy another signature and do not shut down CardExchange® Visitor, the copied signature will remain on the clipboard.

5.5.4 Import Signatures



It is possible that you do not want to capture a signature of someone because you already have his/her signature. If this signature is in one of the usual formats (bitmap, jpeg, png, etc.), you can use the **Import signature** function indicated to import it and store it for the selected record in CardExchange® Visitor.

This function is accessible in the following ways.

- Click **Import signature** button in the photos tab of the ribbon,
- Click on the **Import signature** icon when adding/editing a visitor.

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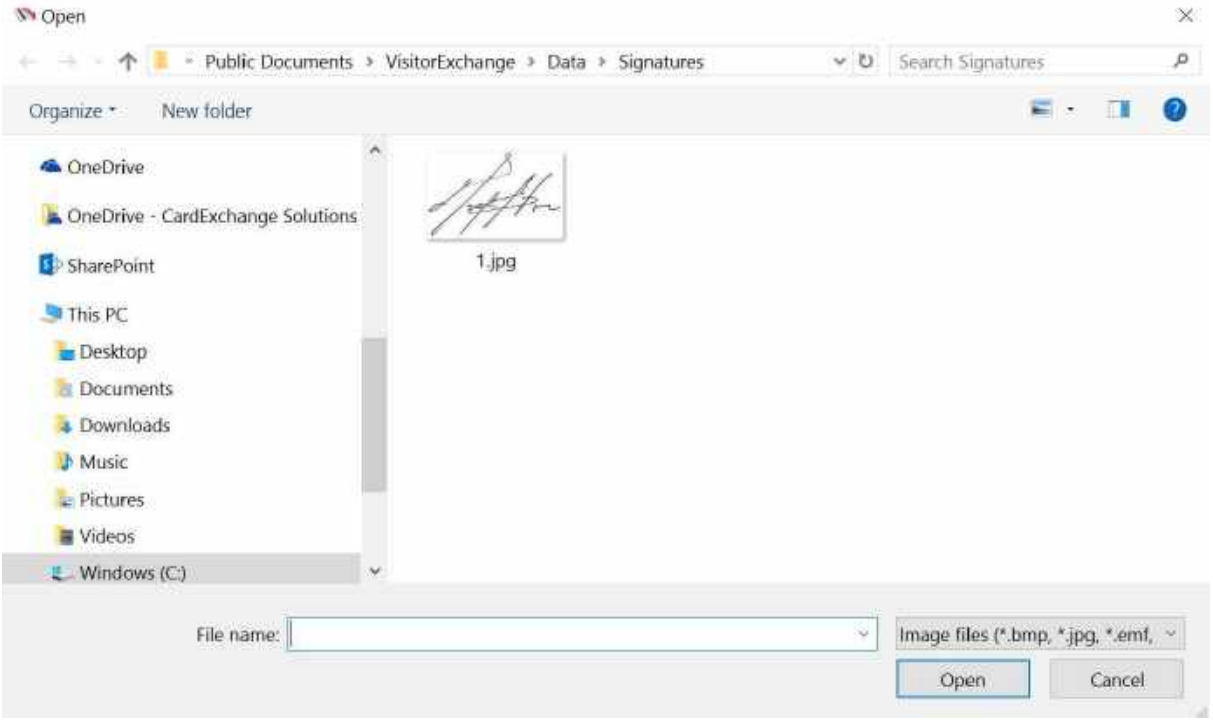
If you click **Import signature**, you enter a dialog window that allows you to select the signature file.



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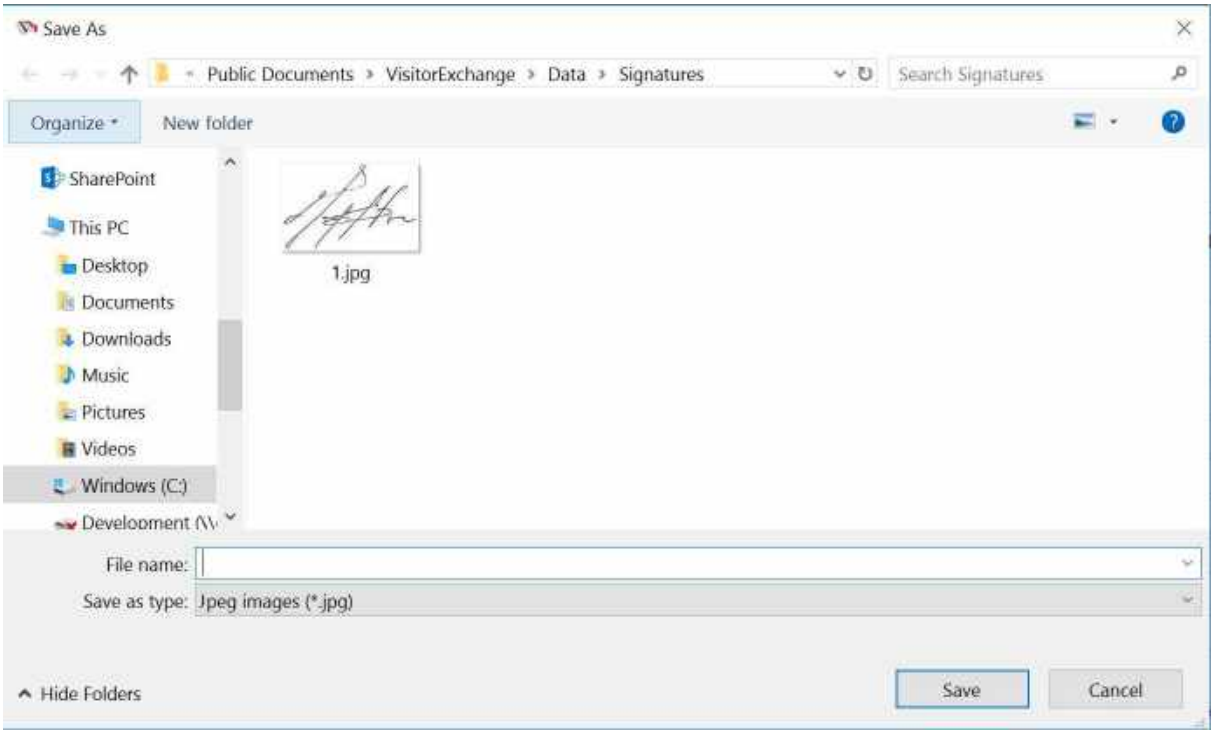
If you have found and selected the file, click **Open** and the signature will be displayed in the Image Editor 179 window. Here you can crop the signature to the right size and perform any other editing operations.

5.5.5 Export Signatures

The opposite to import signature is also possible. You can export an existing signature from the database to a file. To do this, click the **Export signature** button indicated in the **Actions** section. Once more a dialog window will be displayed in which you can specify the name and location of the file that must contain the signature.



You can choose between two supported file formats: **Bitmap**, **jpg**, **emf**, **gif**, **png**, and **tiff**.

Click on **Save** and the signature is exported to the selected location.

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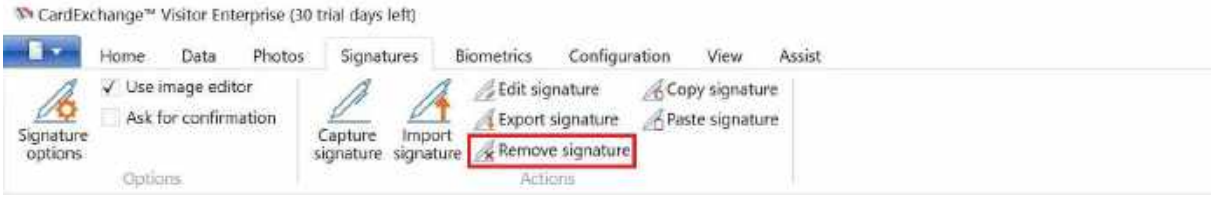
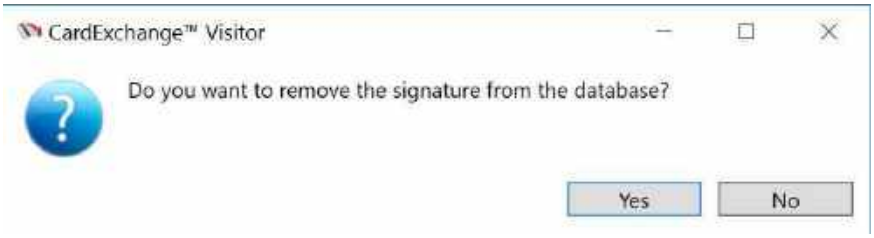
5.5.6 Remove Signatures



Signatures can be removed from the database by clicking the **Remove signature** button from the **Actions** section indicated . The user will be asked to confirm the remove operation with the following question.

This function is also accessible by clicking on the **Remove signature** icon when adding/editing a visitor.



When you click **Yes**, the signature will be removed from the database.

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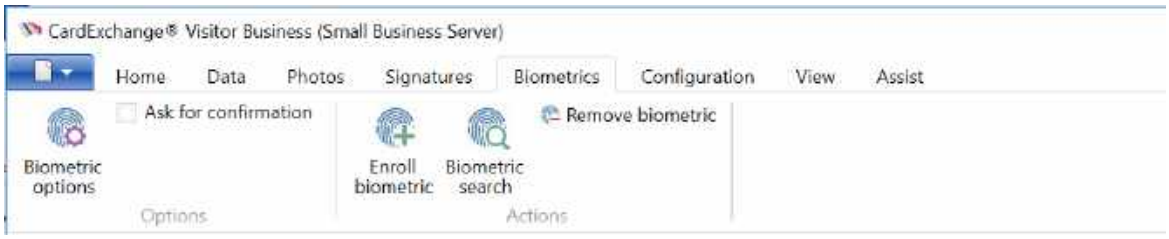
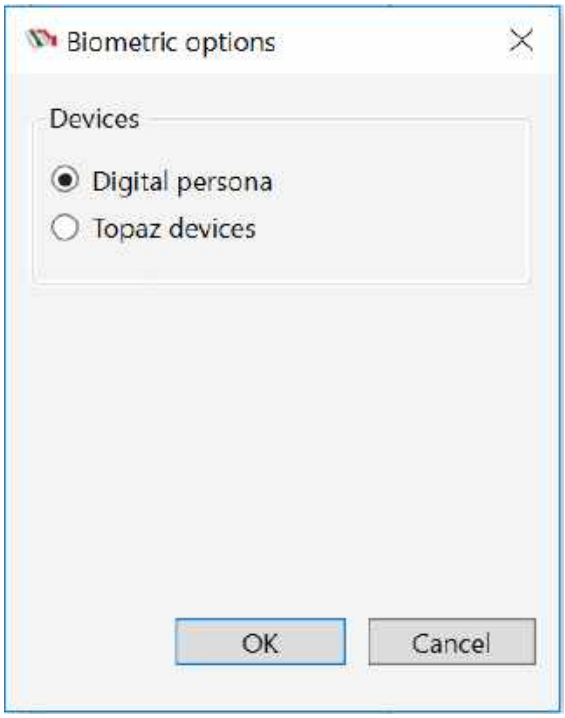
5.6 Biometrics



IMPORTANT! Biometrics are supported starting from Business and higher editions!

In this section of the help file you can find all the information of how to use Biometrics with CardExchange® Visitor.

5.6.1 Biometric options



In the Biometric options you can choose either Digital Persona or Topaz devices depending on the hardware you have.

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5.6.2 Enroll Biometric

When clicking on enroll Biometric you will be prompted to place finger on the reader, once scanned you can click on ok to proceed.

5.6.3 Biometric Search

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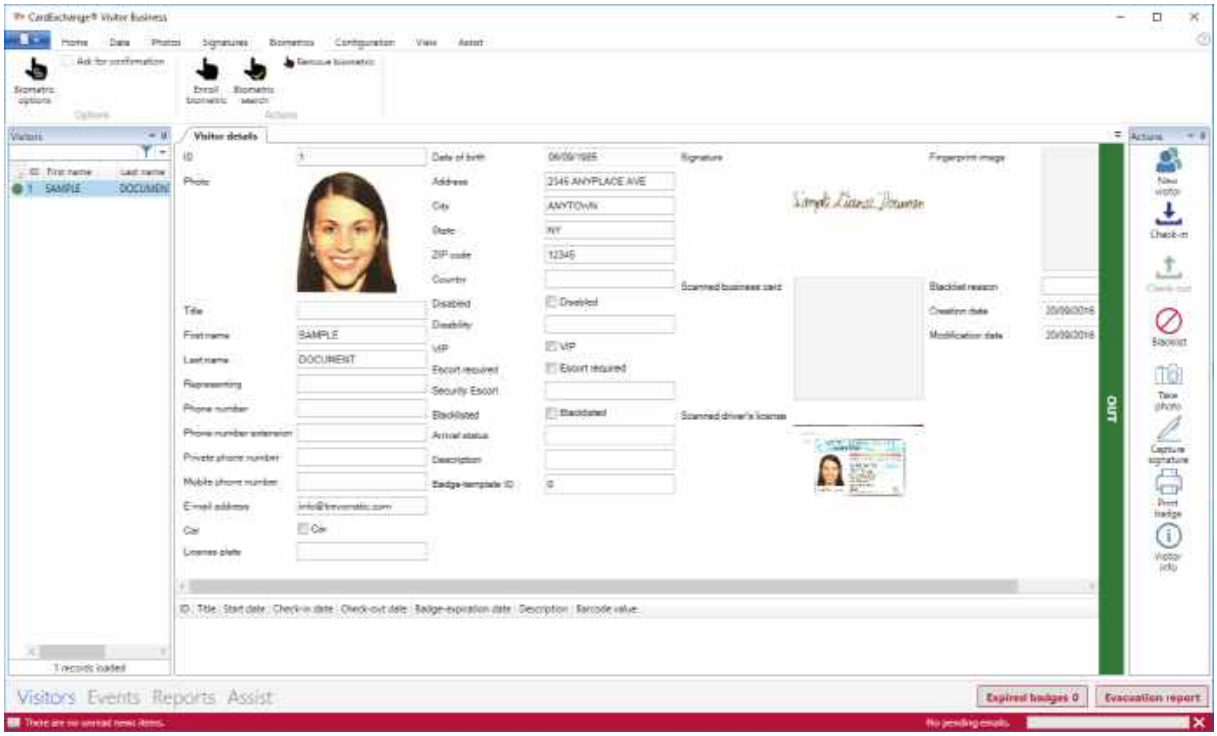
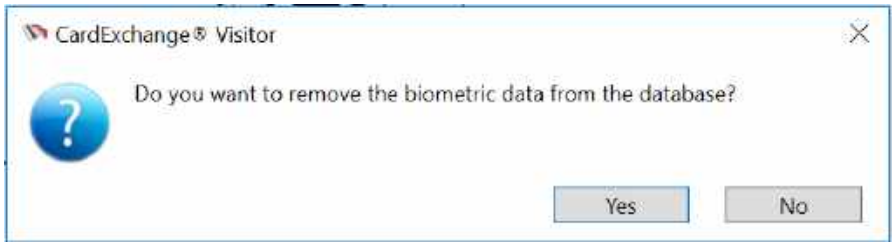
When clicking on Biometric search you will be prompted to place finger on the reader, after a successful read it will attempt to look up the matching record from the database. If sound the record will be displayed.



If no matching record is found the below message is shown, you can then proceed to enroll the new visitor if you wish using the enroll biometric option.

5.6.4 Remove Biometric



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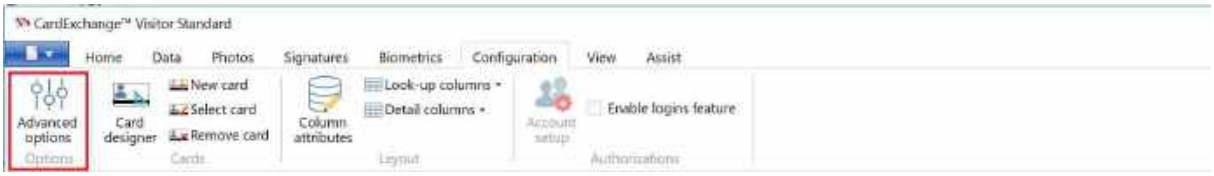
If required, you can also remove the stored biometric template from the database.

5.7 Configuration

Under the configuration tab you can set some advanced options, create/edit the visitor badge design, change settings for the database columns and setup authorizations.

5.7.1 Advanced Options



Clicking on Advanced Options will show a window where you can changes some advanced settings of CardExchange® Visitor.

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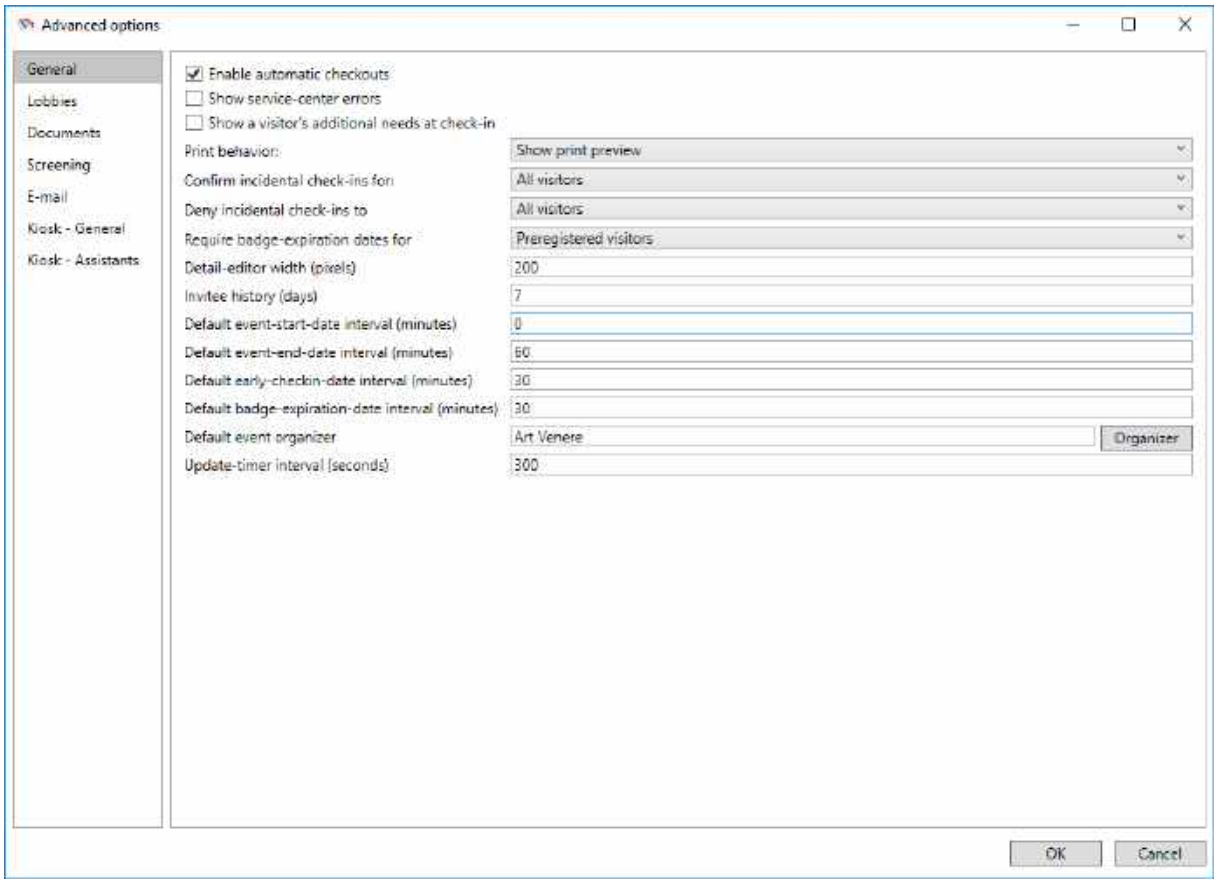

In the Advanced Options window you can set the requirements for each separate discipline of the application, just simply select the tab and change the settings. In this section we explain what the settings are for and how to configure them.

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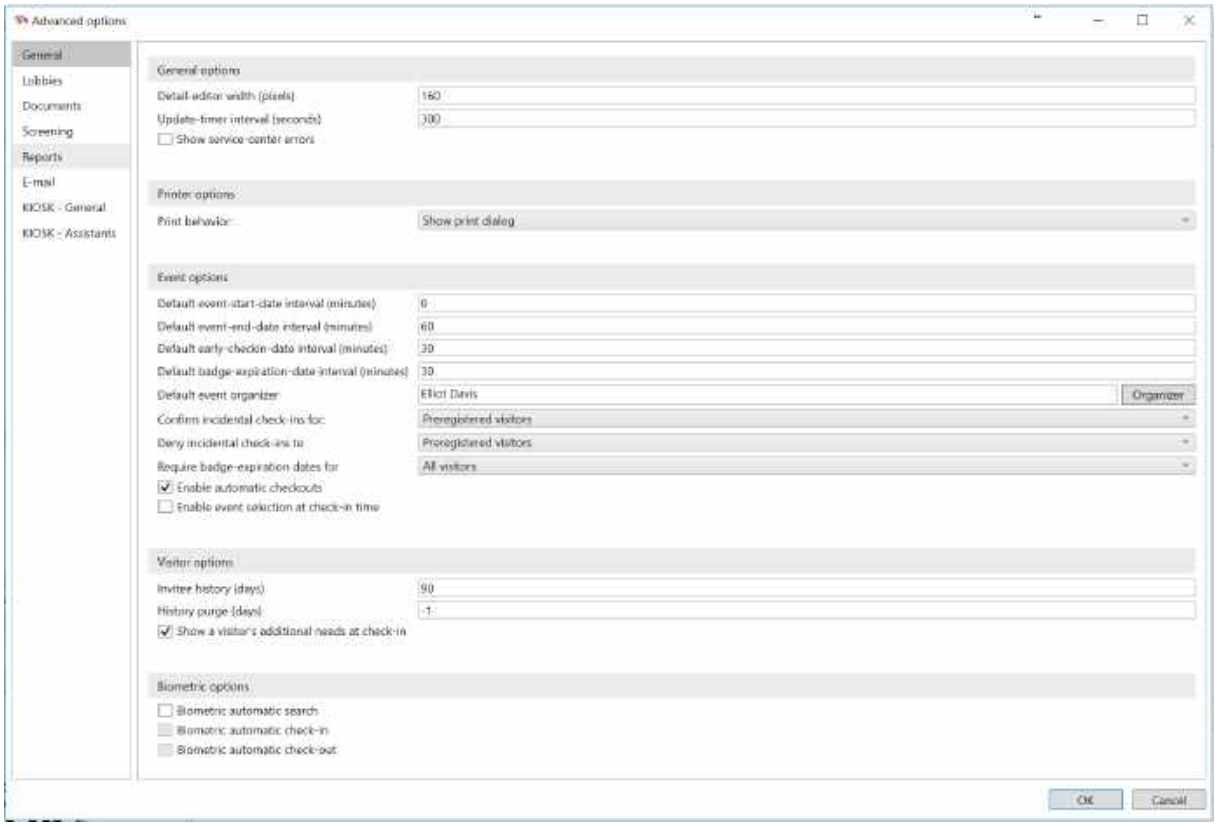
5.7.1.1 General



General options

Detail-editor width (pixels) Set the length of your text boxes, drop down menus, etc., in all the windows that can edit and contain person information.

Update-timer interval (seconds) The time interval in seconds that determines how often changes made by others are uploaded to the current installation. By default this is 300.

Show service-center errors This is a debug setting when no content is shown inside the Assist portal. Standard this is disabled and has no influence on the main application.

Printer options

Print behavior This applies to printing reports. You can select here if you want to show a preview of the report first, directly open the print dialog, or send the report directly to the last selected printer.

Event options

Default event-start-date interval (minutes) Determines how many minutes after the current time should the event start. By default this is 0.

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Default event-end-date interval (minutes)	Determines how many minutes after the start time time should the event end. By default this is 60.
Default early-check in-date interval (minutes)	The default number of minutes before the start date occurs, that users are allowed to check-in for an event. By default this is 30.
Default badge-expiration-date interval (minutes)	The default number of minutes after the end date occurs, that the badges will expire. By default this is 30.
Default event organizer	Select the default event organizer for new events.
Confirm incidental check-ins for	Here you can select if you want to have a confirmation before check-in, or not, and if so, for who.
Deny incidental check-ins to	Here you can select what type of visitor is denied to check-in, when you select all preregistered visitors, they can only check in to the preregistered event and not as an individual visitor.
Require badge-expiration dates for	Badge expiration notices are handy to keep track of who is overstaying in your premisses. You can select here who will receive a badge expiration date.
Enable automatic checkouts	When selected and closing the application, a window will be shown with the current checked in visitors so they can be checked out.
Enable event selection at check-in time	If checked you will be able to select an event to add a visitor to during the check-in process.

Visitor options

Invitee history (days)	Enter the amount of days you want to the history of a visitor. By default 7 days is shown.
History purge (days)	Determines the number of days to retain a visitors personal information. (Default = -1, retain the visitors details indefinately)
Show a visitor's additional needs at check in	Some visitors have special needs like disabilities, VIP, or need to be escorted, when incidental check-in's are done, it can be handy to know this before checking in. When this option is checked, the needs will be shown in the check-in confirmation window.

Biometric options

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Biometric automatic search	When checked, the database will automatically be searched for a matching record when a visitor places their finger on the Biometric reader.
Biometric automatic check-in	When checked, the database will automatically be searched for a matching record when a visitor places their finger on the Biometric reader, if a match is found they will then be automatically checked-in.
Biometric automatic check-out	When checked, the database will automatically be searched for a matching record when a visitor places their finger on the Biometric reader, if a checked-in match is found they will then be automatically checked-out.

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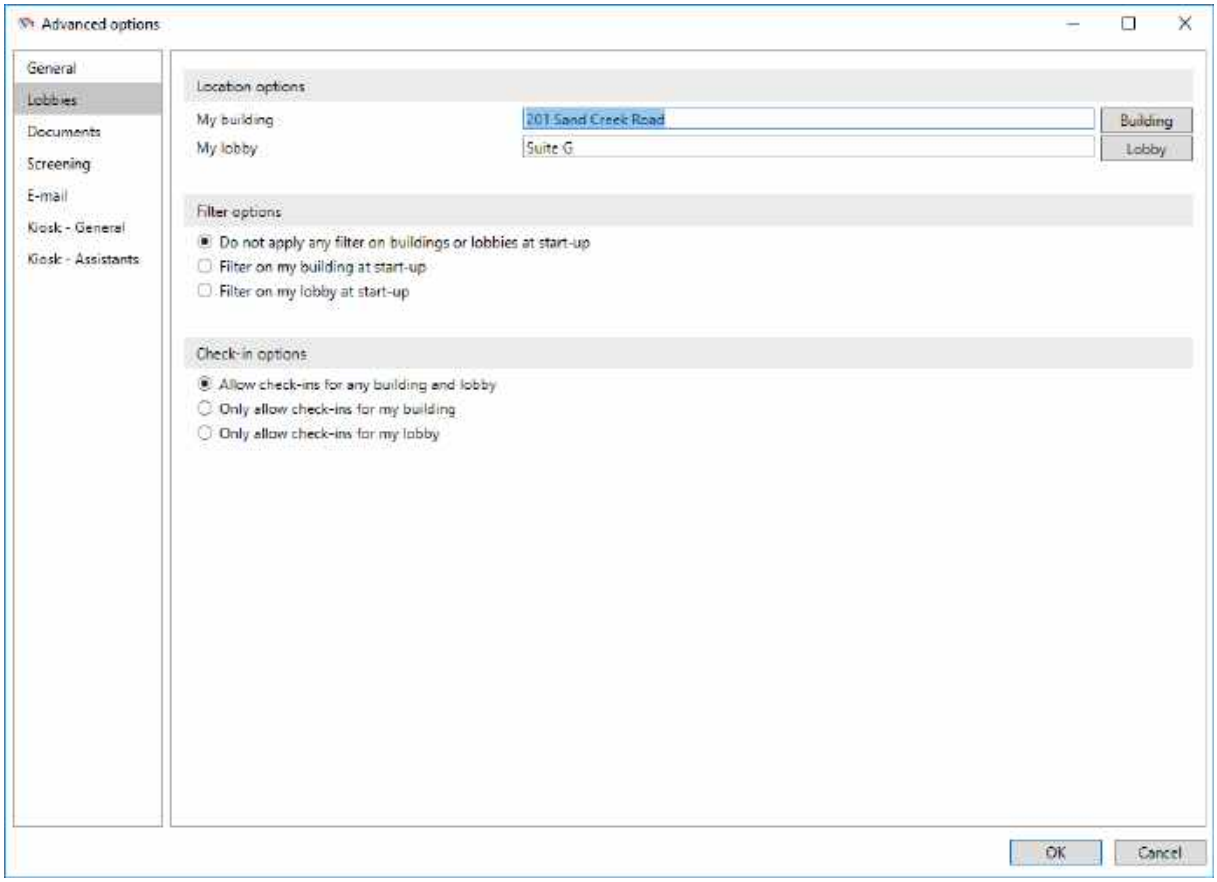
5.7.1.2 Lobbies



Location options:

My building	Here you can select the name of the building that the current installation is in
My lobby	Here you can select the name of the lobby that the current installation is in

Filter options:

Do not apply any filter on buildings or lobbies at start-up	Select this option to show all visitors/events at start-up (Default)
Filter on my building at start-up	Enable the building filter at start-up to only show visitors/events for the current building
Filter on my lobby at start-up	Enable the lobby filter at start-up to only show visitors/events for the current building

Check-in options:

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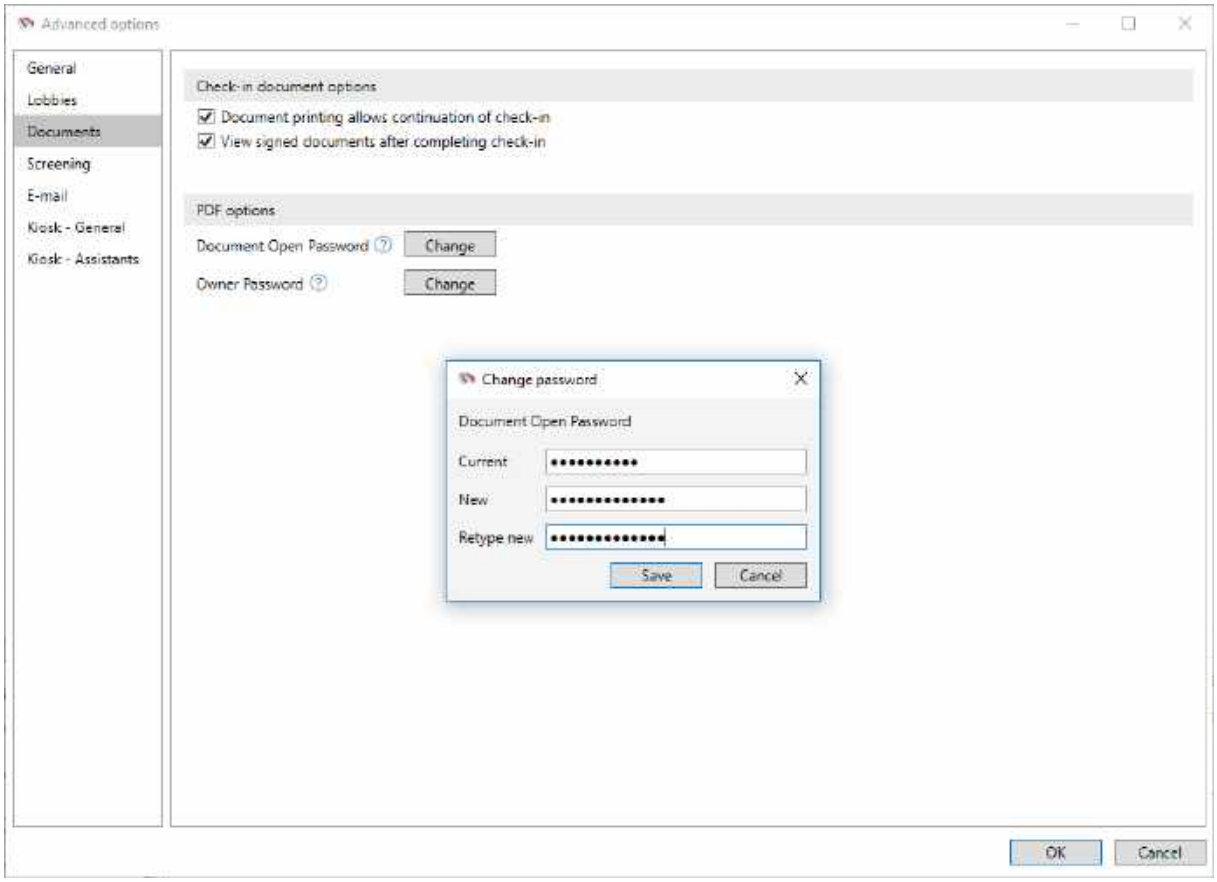
Allow check-ins for any building and lobby	Select this option to allow check-ins for all visitors/events (Default)
Only allow check-ins for my building	Allow only check-ins for the current building
Only allow check-ins for my lobby	Allow only check-ins for the current lobby

5.7.1.3 Documents



Check-in document options

Document printing allows continuation of check-in	When checked, printing of the document to be physically signed will allow the check-in process to continue
View signed documents after completing check-in	When checked, documents signed digitally will be shown after completing check-in

PDF options

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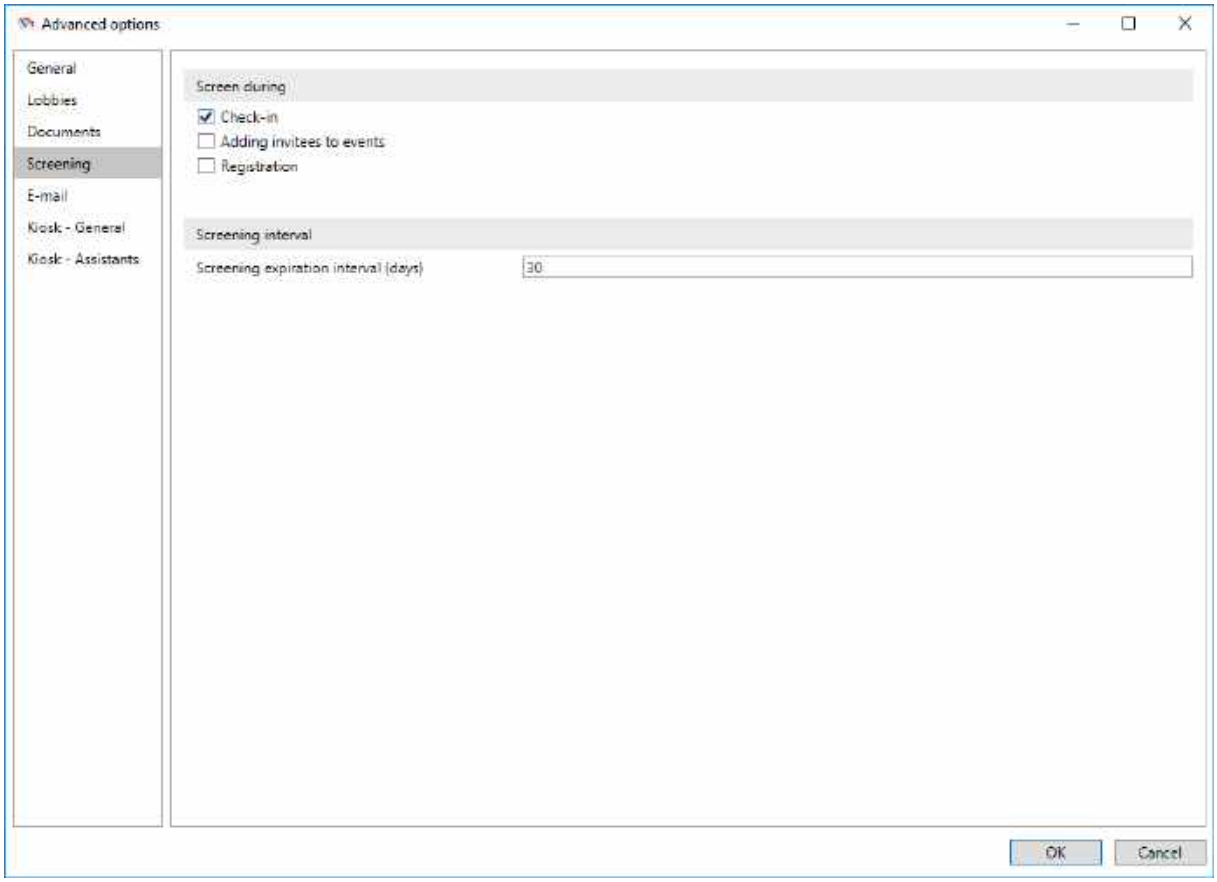
Each document is saved as an encrypted PDF. When attempting to open one of these documents, a prompt is shown asking for a password to be entered.
Two types of passwords can be entered: Document Open Password or Owner Password. Depending on which is entered, different permissions are granted.

Owner password: All permissions (modifying, copying, standard and high-resolution printing, content accessibility) [default: “owner”]
Document Open Password: No permissions [default: “password”]

Here you can change the default password for both options.

5.7.1.4 Screening



CardExchange® Visitor Business Edition is offering visitor screening via criminal and sex offender database systems of Amber Road and MK Data Services. CardExchange Solutions does not provide subscriptions for these screening services.
To use these services, a separate subscription will have to be purchased from these companies. For all available services we offer direct links to their websites.

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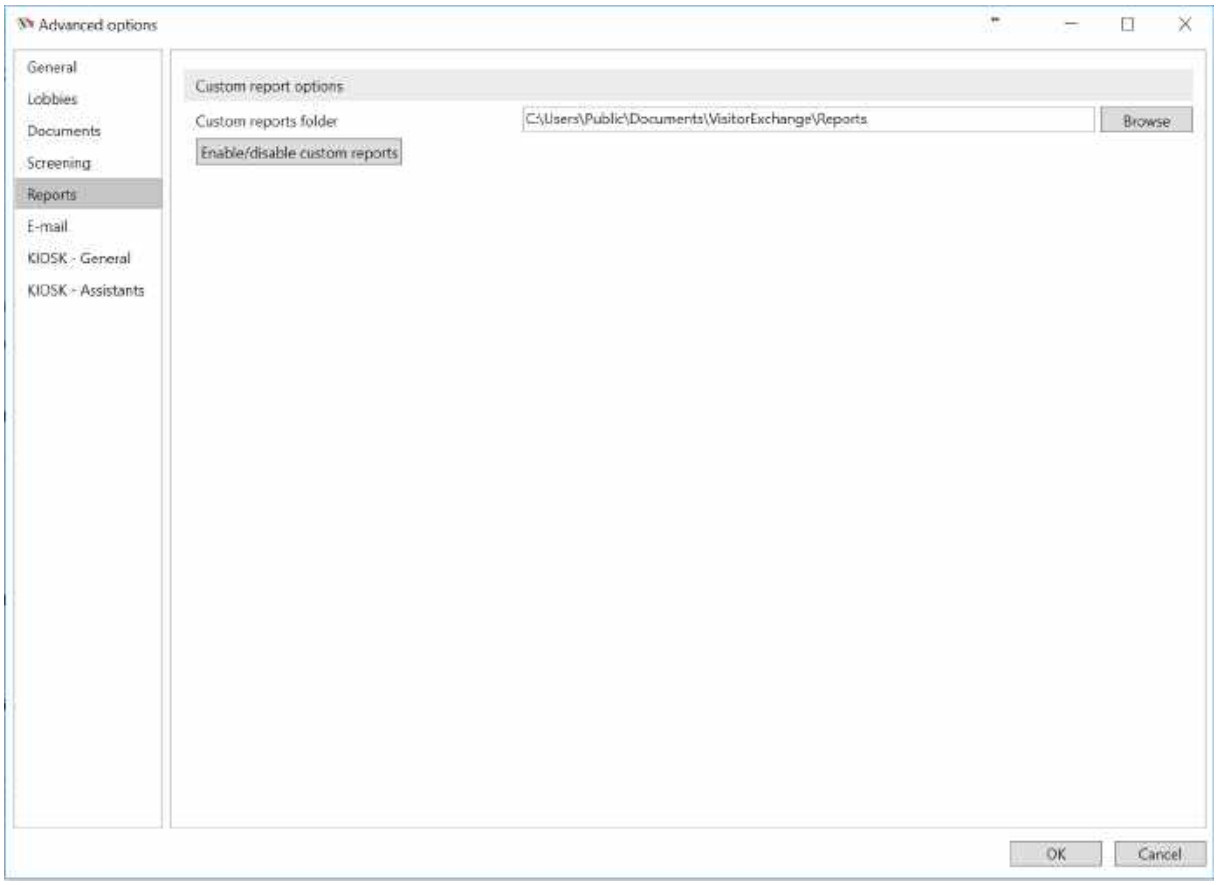
When you are using visitor screening with the Business edition, and you have obtained a subscription for these services, you can define in this window how the services apply to your situation. As default, the screening will always be done before check in.
You can set the screening during check in, when you add invitees to an event, or when you register an new visitor.

You can also specify how long the screening result will be valid for, by default this is 30 days but you can set this to your desired interval or you can set it to 0 to screen the visitors every time.

5.7.1.5 Reports



CardExchange® Visitor Business Edition offers the possibility to use custom reports.
These reports must be designed by CardExchange Solutions and you can contact our sales department to inquire regarding pricing.

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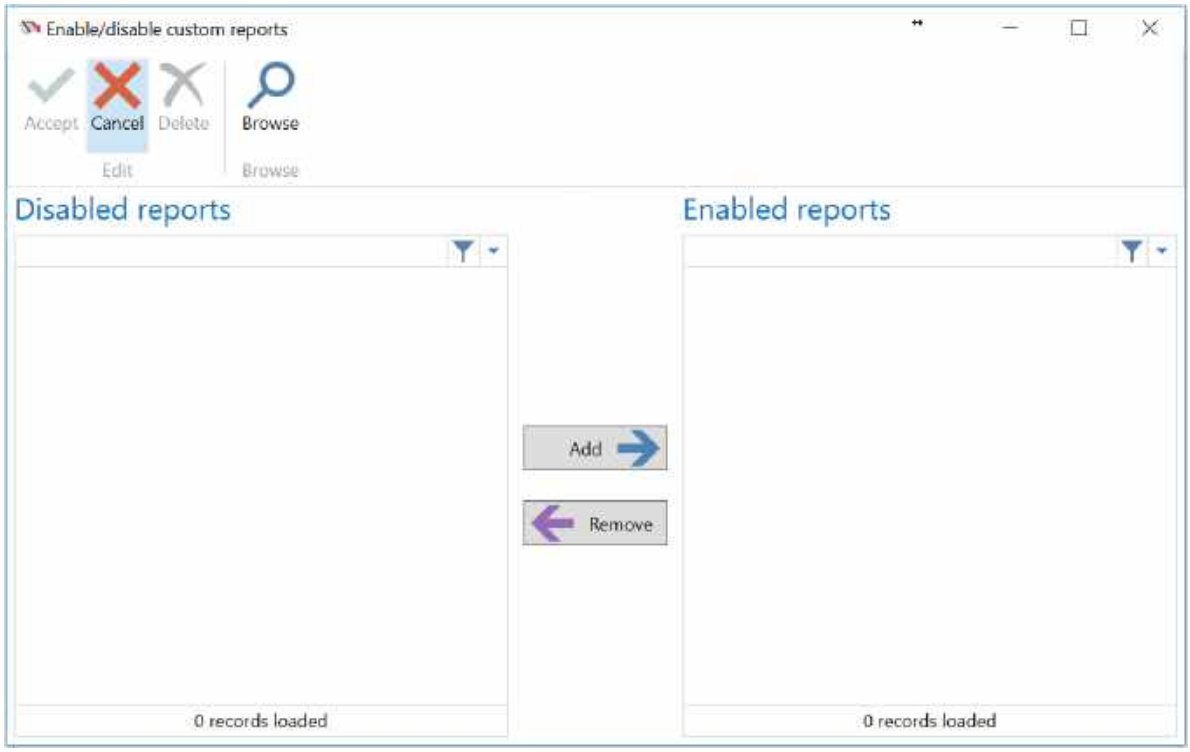
Once you have received your custom report file you will need to copy it into the custom reports folder defined in the above window.



Clicking on the enable/disable custom reports button will then show the above window where you can add the reports that you want to be available under the reports section.

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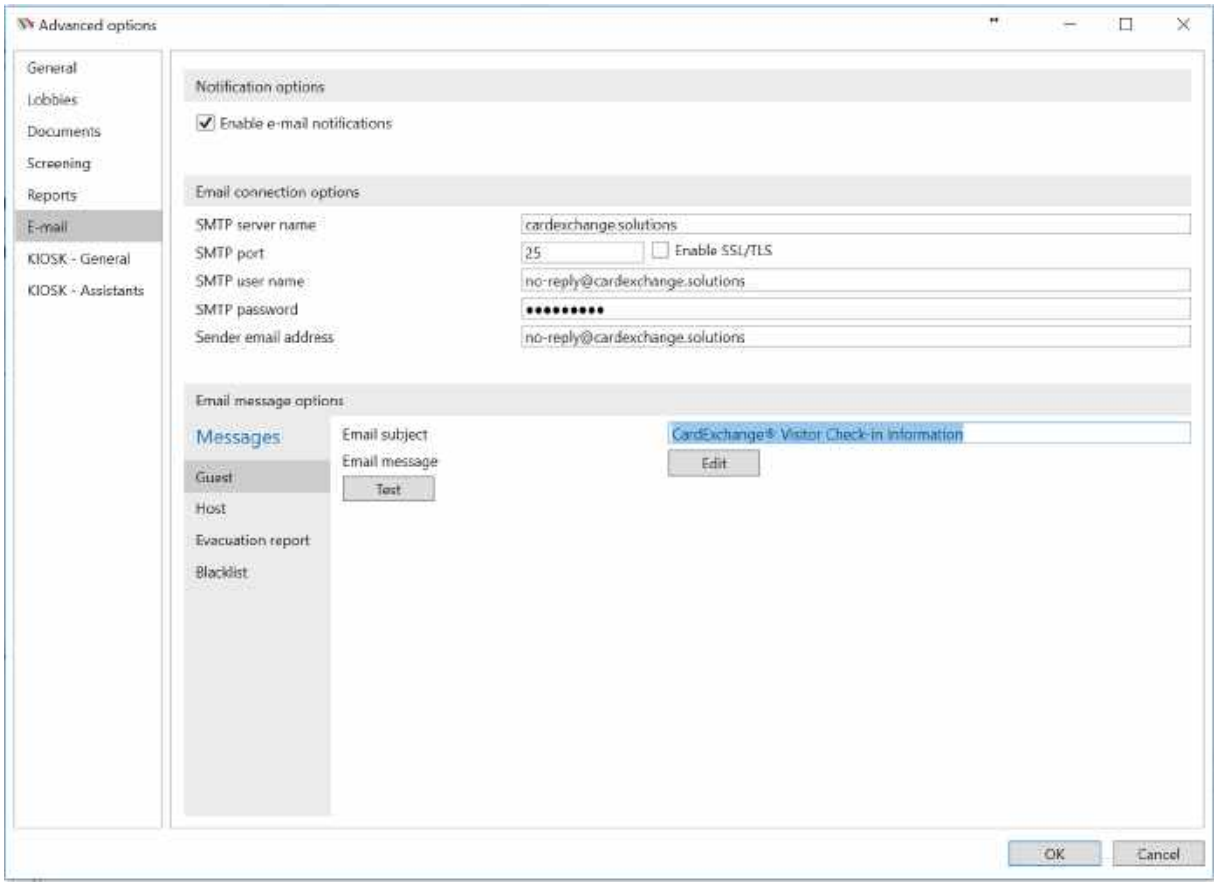
5.7.1.6 Email



CardExchange® Visitor Business Edition is offering email notifications to each Invitee of an event when the event is created, also an email notification is sent to the host of the event each time an invitee checks in to that event.
Evacuation reports can also be emailed if required and there is an option to use a call for help button when a blacklisted visitor tries to check in.

In this section you can enable email notifications, specify the SMTP server settings and customize the messages that are sent for each option.

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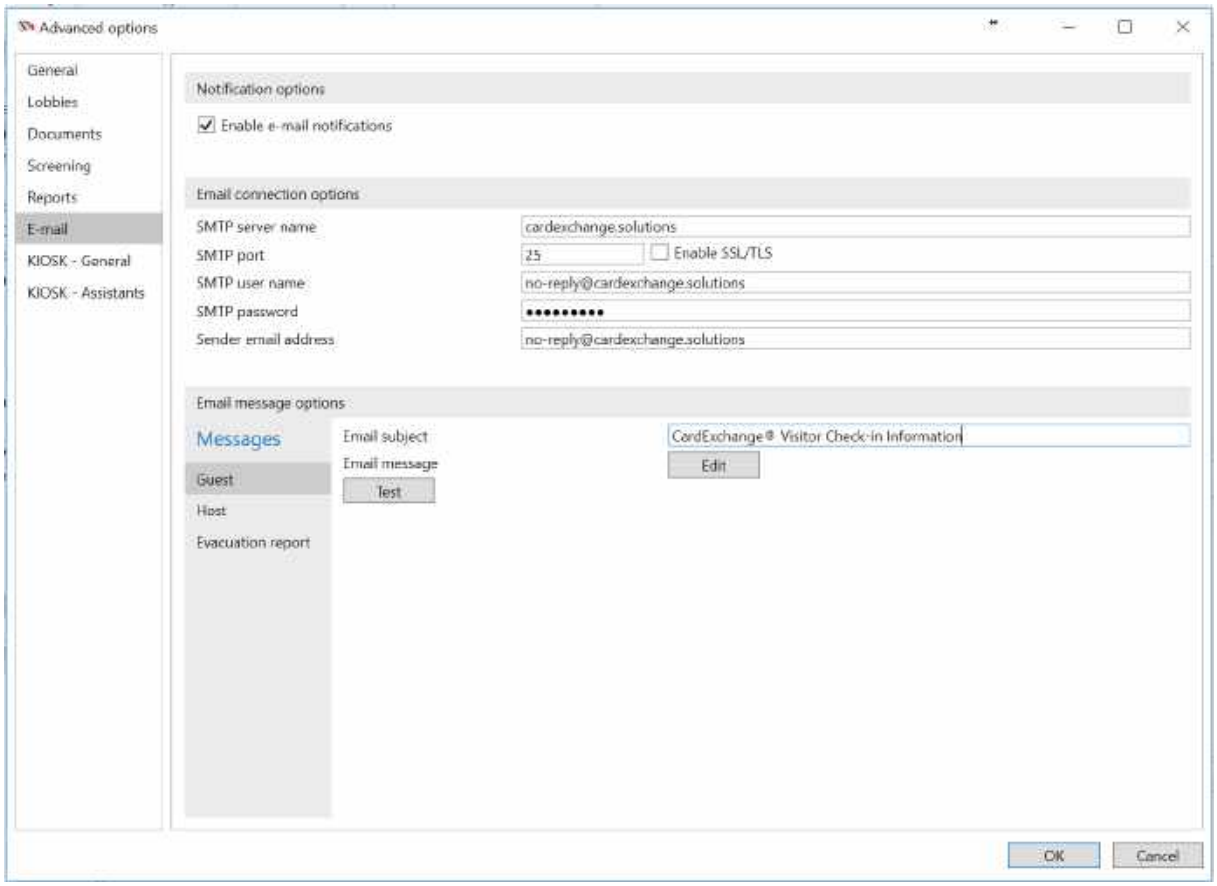
5.7.1.6.1 Guest Notification Email



Here you can change the email subject for the confirmation emails that are sent to visitors when they are pre-registered for events.
You can also send a test email to the specified sender as well as edit the message. An overview of the email editor can be found here 206.

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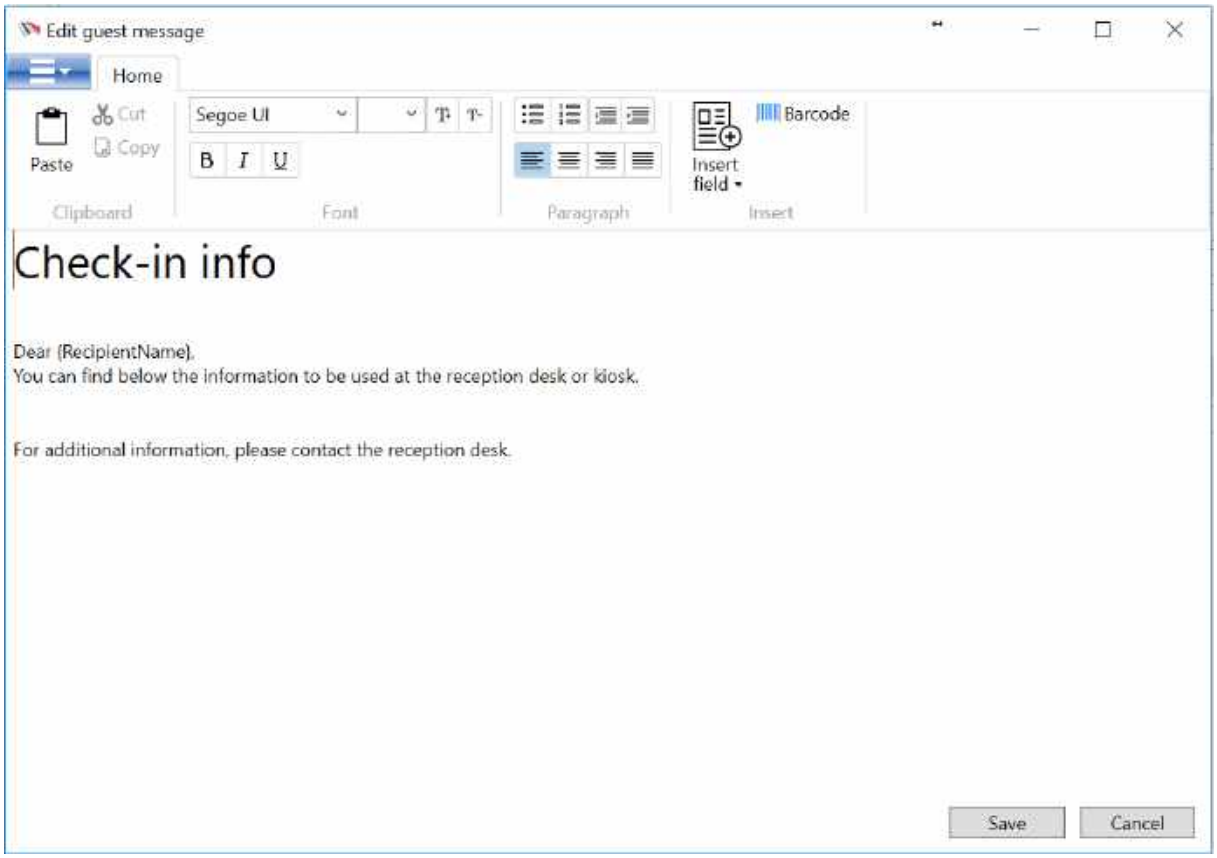
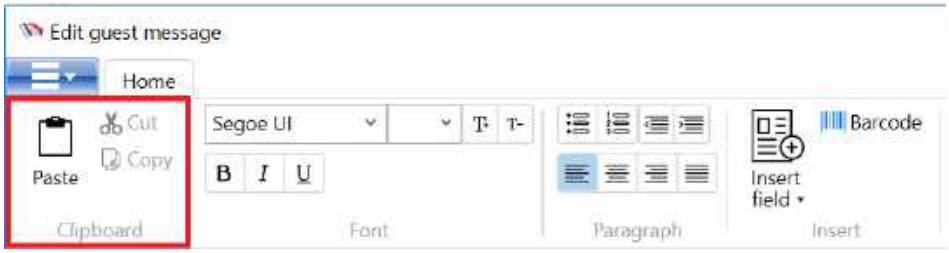
5.7.1.6.1.1 Edit Guest Message



When editing the email message you are presented with the above screen, you can type text directly into the editor and format it using the options in the ribbon.



Under the Clipboard section you can paste in text copied from elsewhere, you can also cut and copy text.

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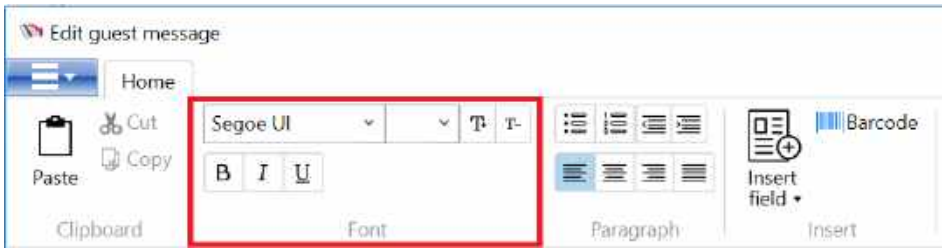
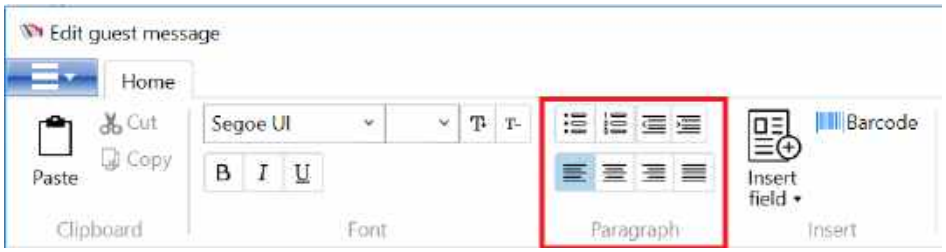
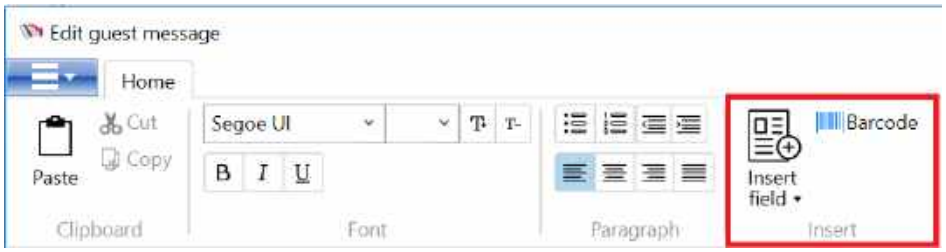


Under the Font section you can set the desired font, size and style.



Under the Paragraph section you can change the formatting/alignment for the selected text.



Under the Insert section you can add a Barcode to the email as well as fields that are linked to the database.

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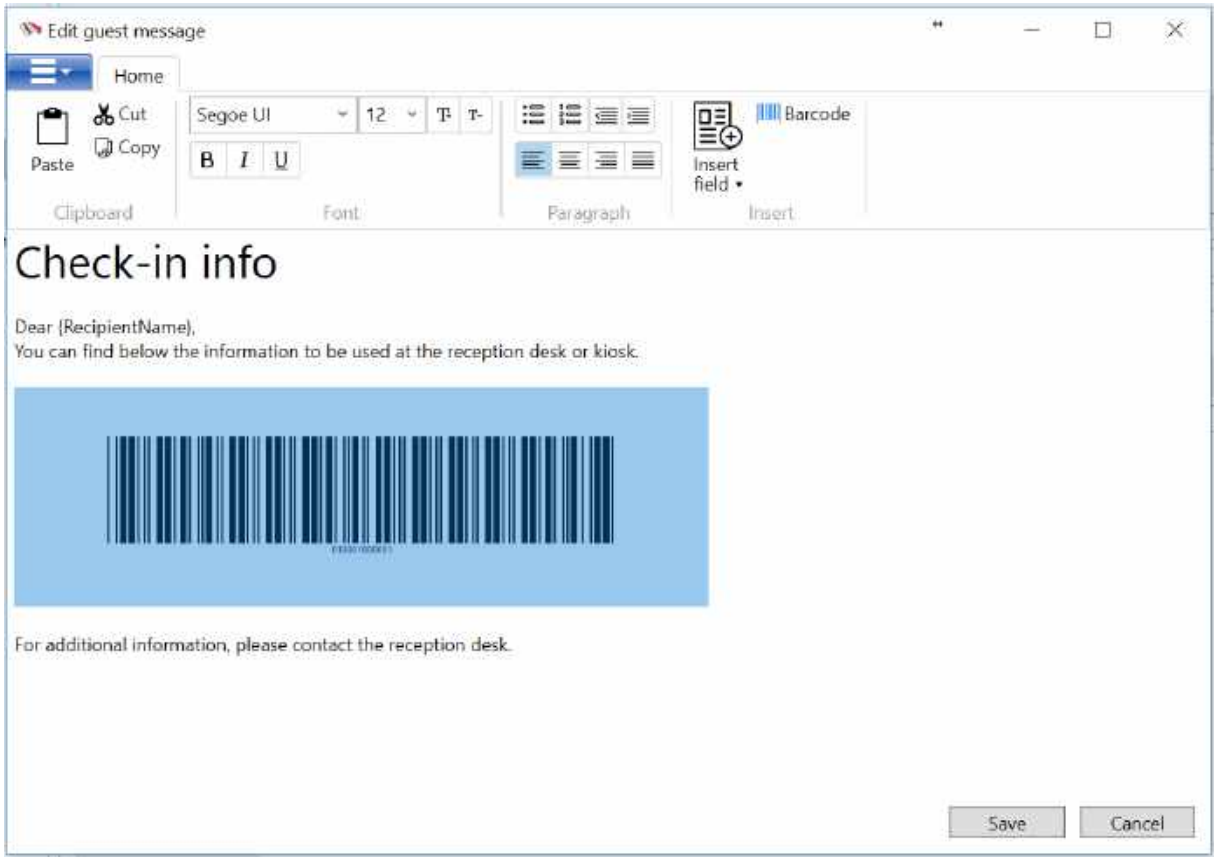

When clicking on Barcode, a Barcode will be added where the cursor is within the email. You can then position it as required by dragging it to the desired location.

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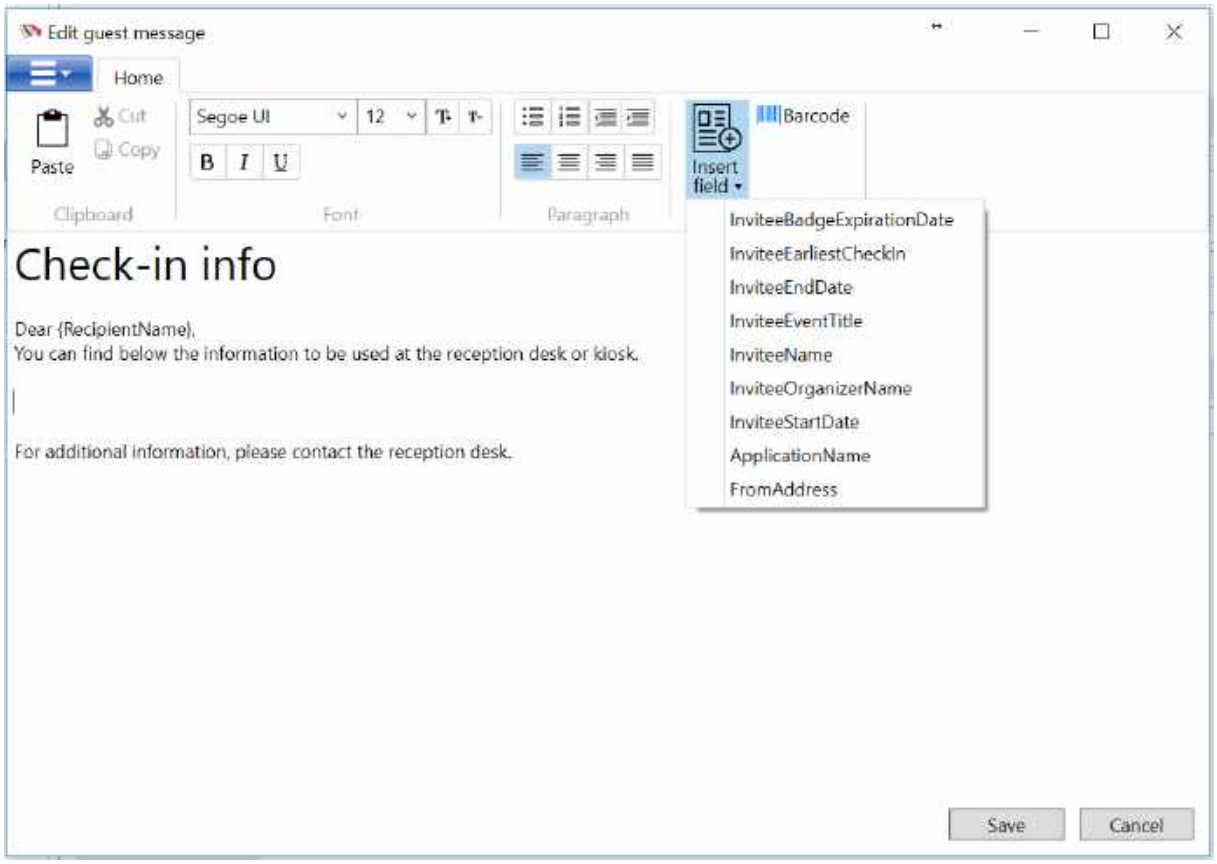

When clicking on Insert field you can choose from the available database columns to include in the email.
An obvious one would be the InviteeName but you can also include details such as the earliest check-in time.

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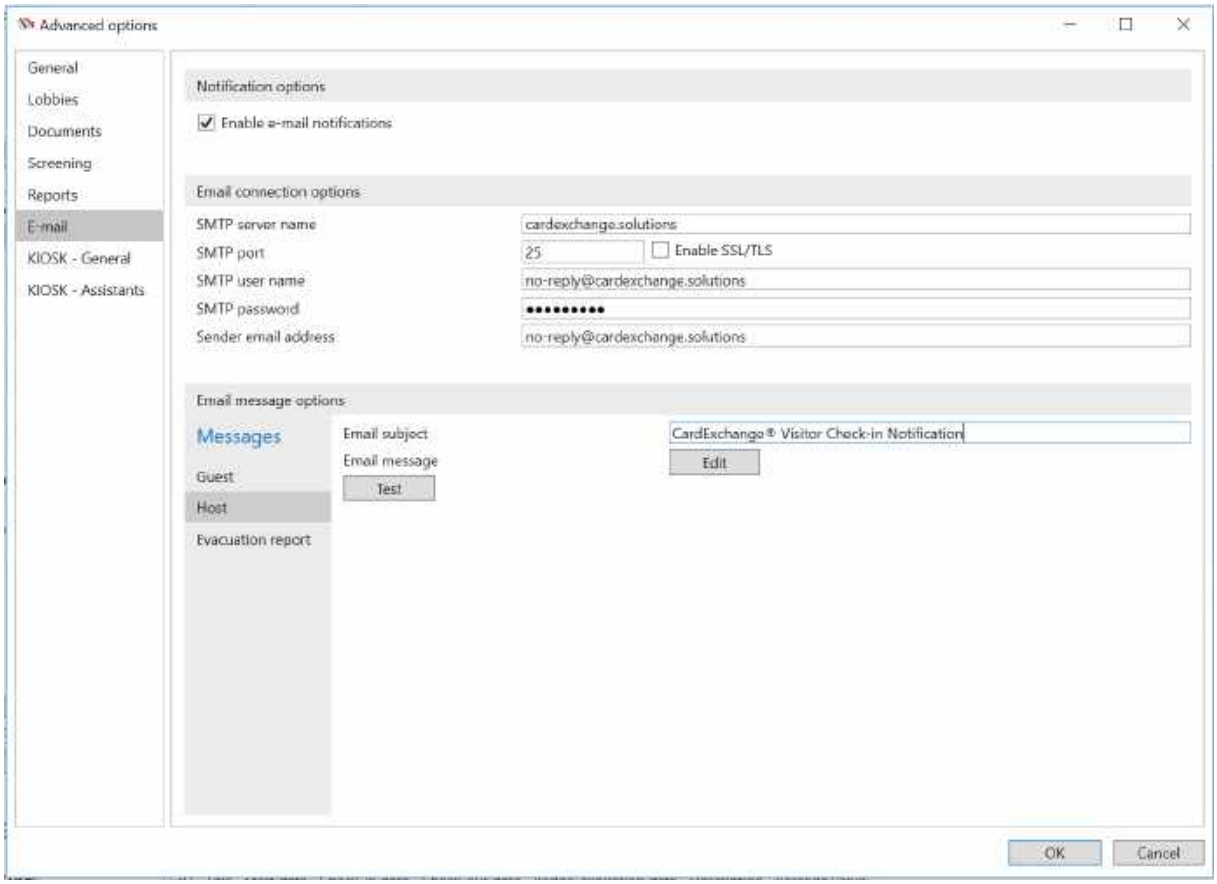
5.7.1.6.2 Host Notification Email



Here you can change the email subject for the confirmation emails that are sent to hosts when a visitor checks in for an event.
You can also send a test email to the specified sender as well as edit the message. An overview of the email editor can be found here 211.

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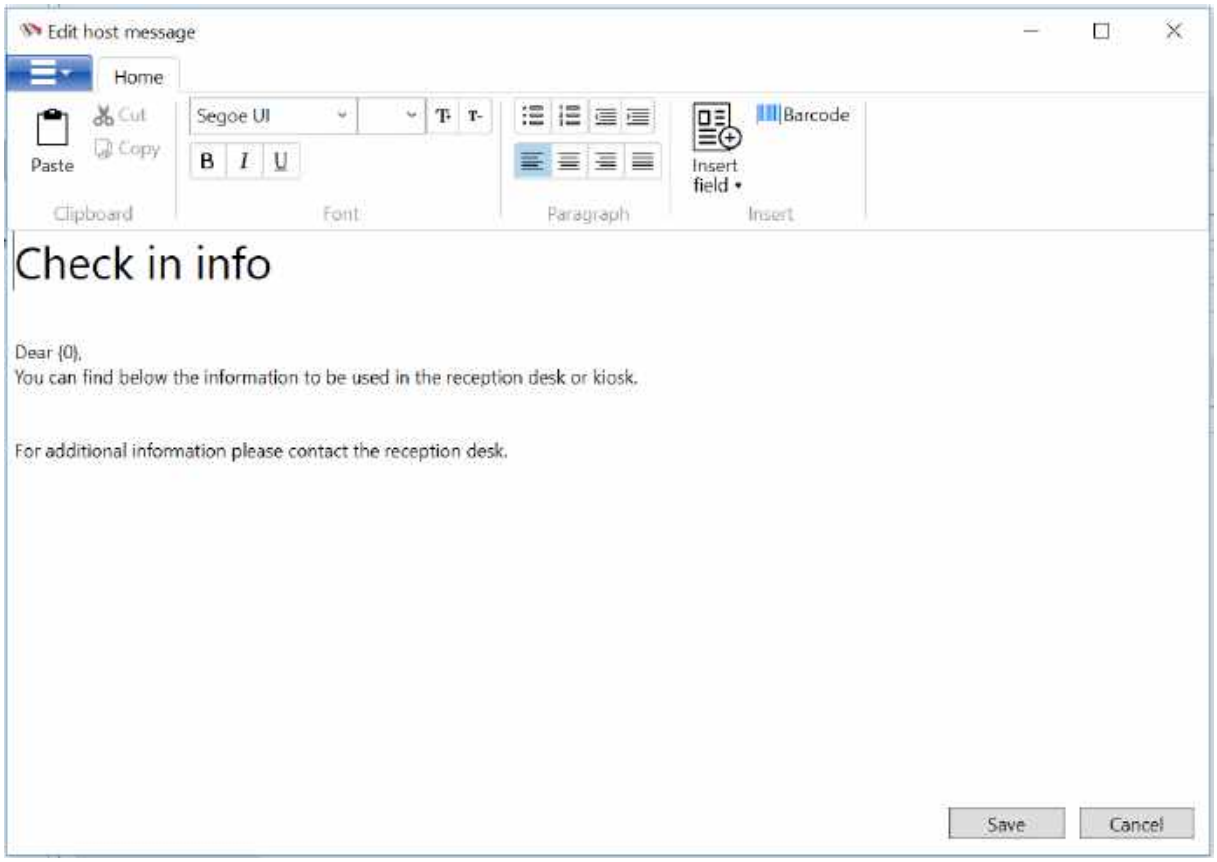
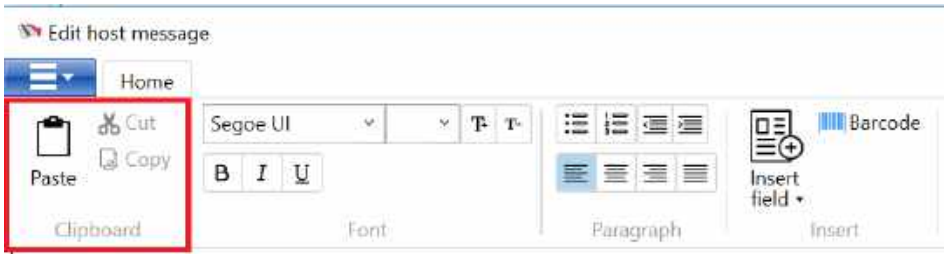
5.7.1.6.2.1 Edit Host Message



When editing the email message you are presented with the above screen, you can type text directly into the editor and format it using the options in the ribbon.



Under the Clipboard section you can paste in text copied from elsewhere, you can also cut and copy text.

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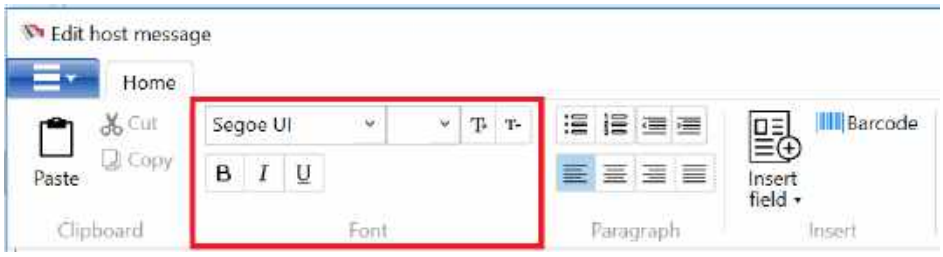
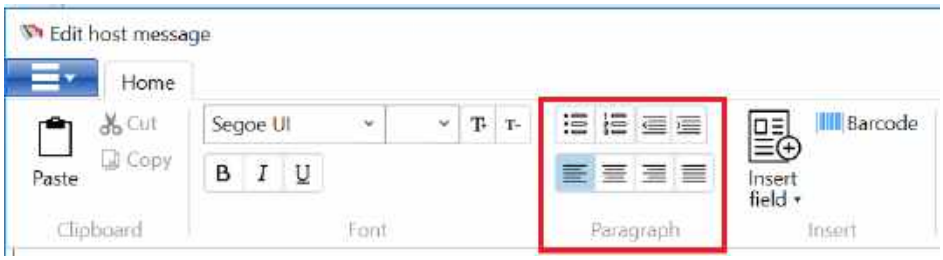
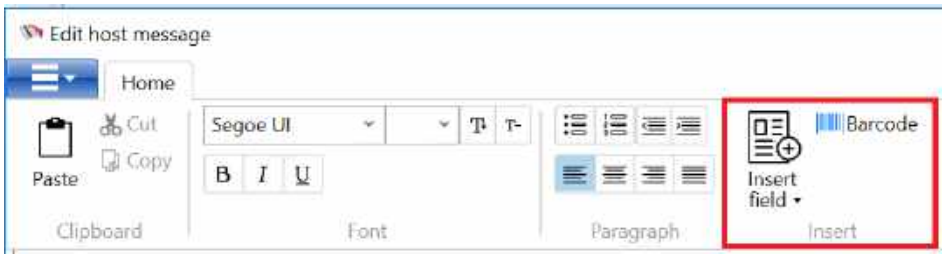


Under the Font section you can set the desired font, size and style.



Under the Paragraph section you can change the formatting/alignment for the selected text.



Under the Insert section you can add a Barcode to the email as well as fields that are linked to the database.

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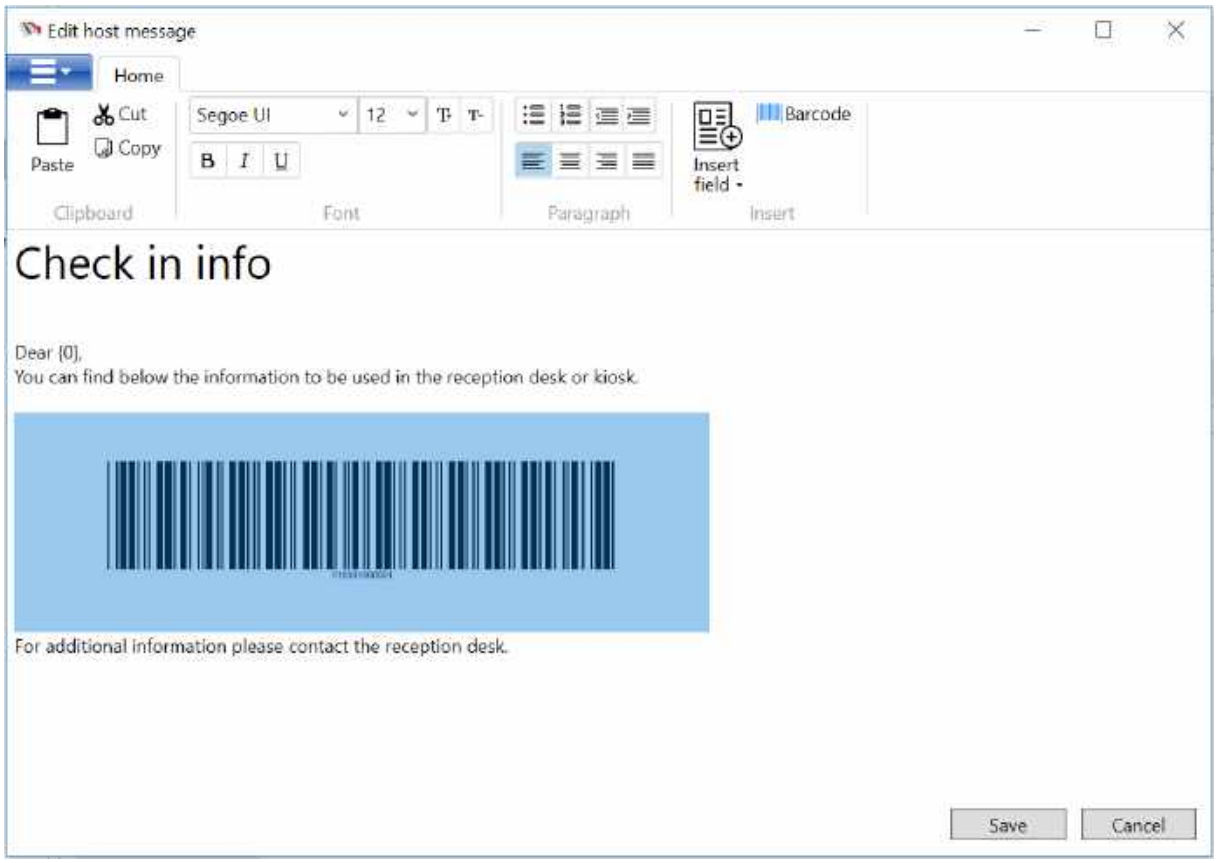

When clicking on Barcode, a Barcode will be added where the cursor is within the email. You can then position it as required by dragging it to the desired location.

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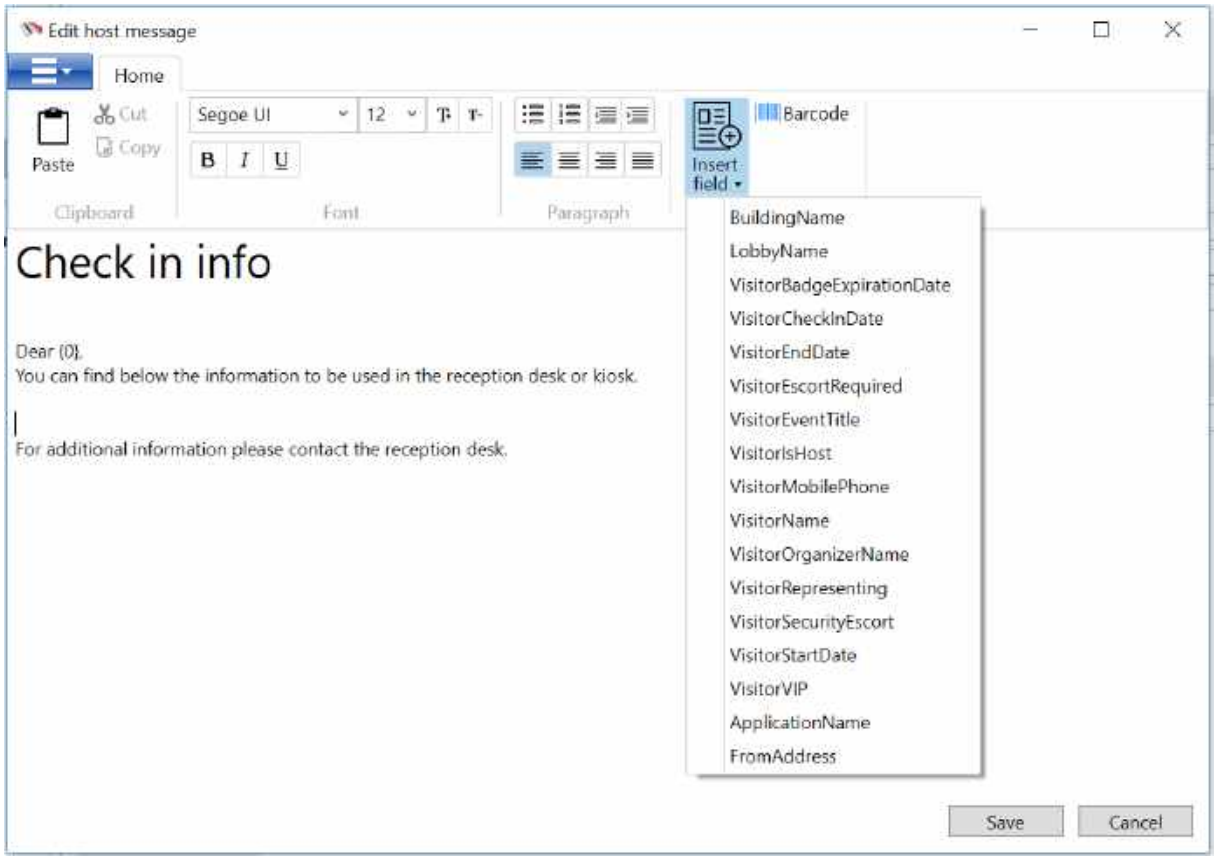

When clicking on Insert field you can choose from the available database columns to include in the email.
An obvious one would be the InviteeName but you can also include details such as the earliest check-in time.

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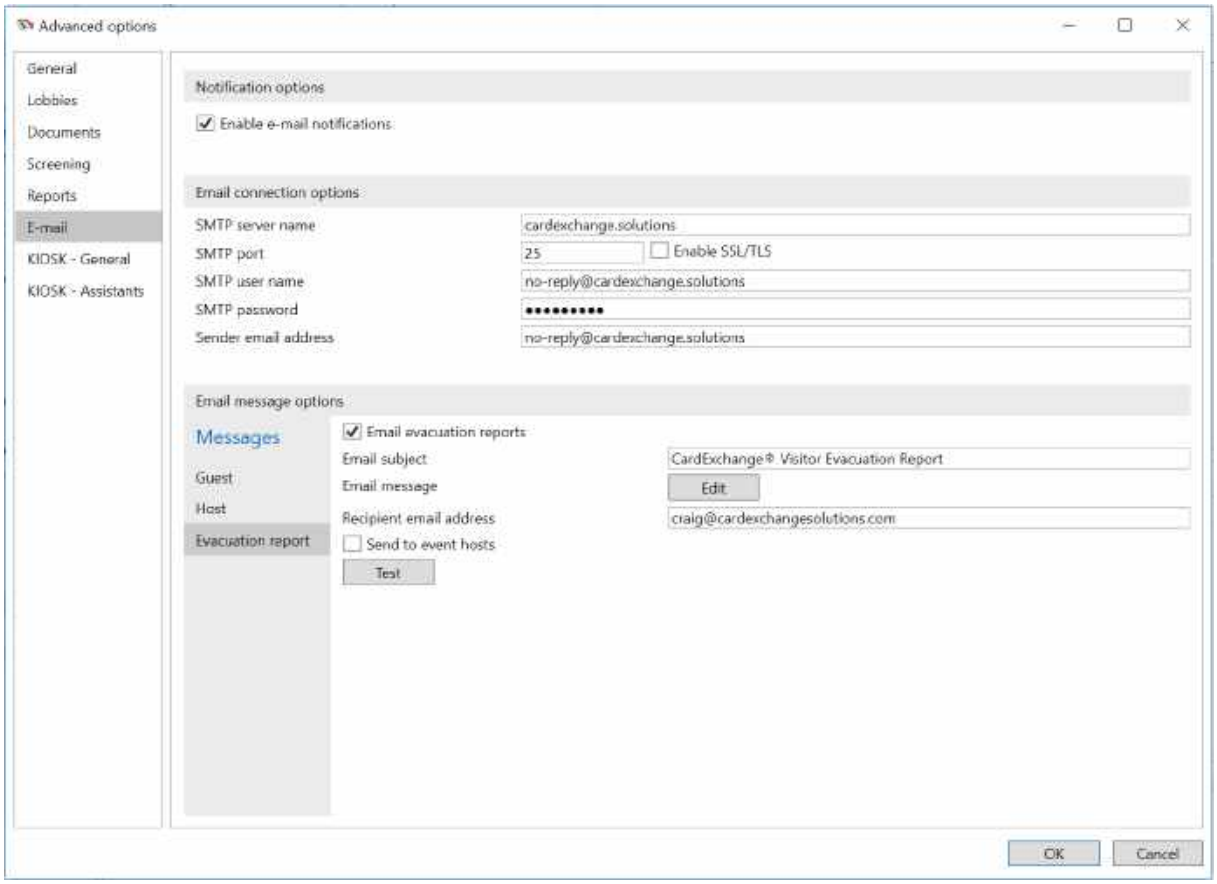
5.7.1.6.3 Evacuation Report Email



Under the evacuation report section you can enable that when generating an evacuation report, it is emailed to the specified recipient.
You can also check the option to send this to event hosts so that they can also see who is in the building for their events in case of an emergency.

You have the option to change the email subject for the evacuation report emails as well as sending a test email to the specified sender and editing the email message.
An overview of the email editor can be found here 216.

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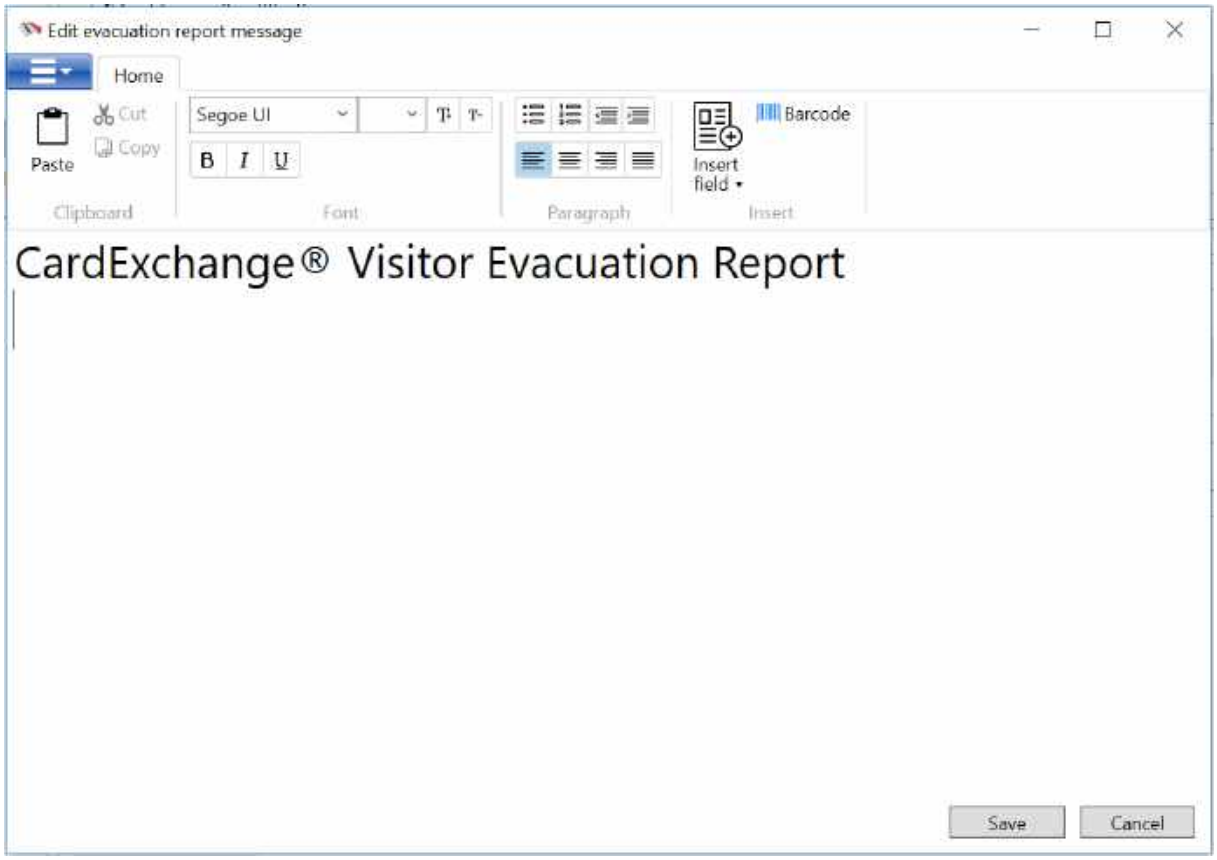
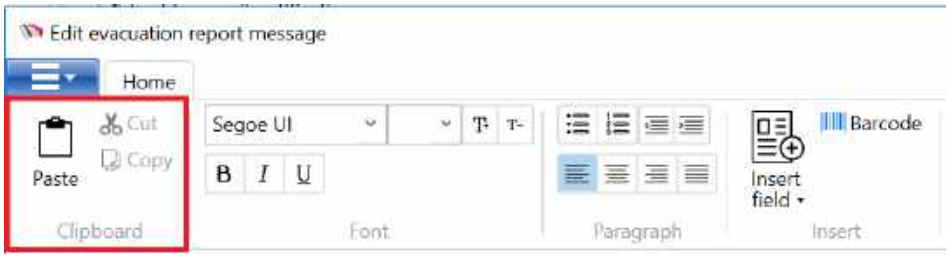
5.7.1.6.3.1 Edit Evacuation Report Message



When editing the email message you are presented with the above screen, you can type text directly into the editor and format it using the options in the ribbon.



Under the Clipboard section you can paste in text copied from elsewhere, you can also cut and copy text.

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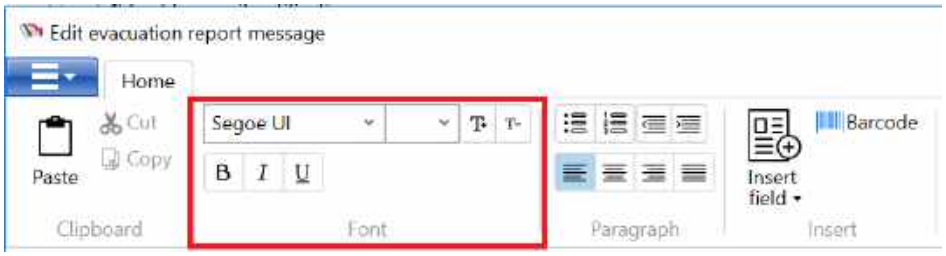
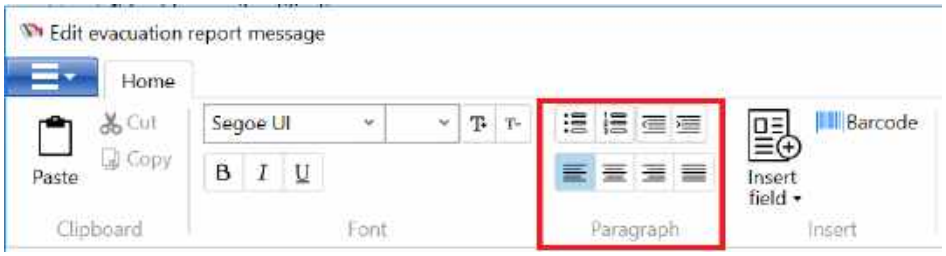
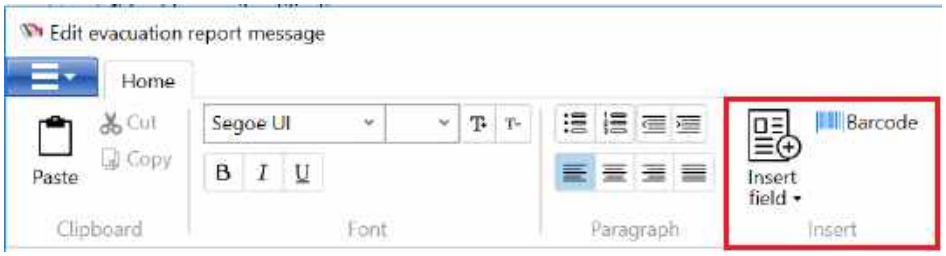


Under the Font section you can set the desired font, size and style.



Under the Paragraph section you can change the formatting/alignment for the selected text.



Under the Insert section you can add a Barcode to the email as well as fields that are linked to the database.

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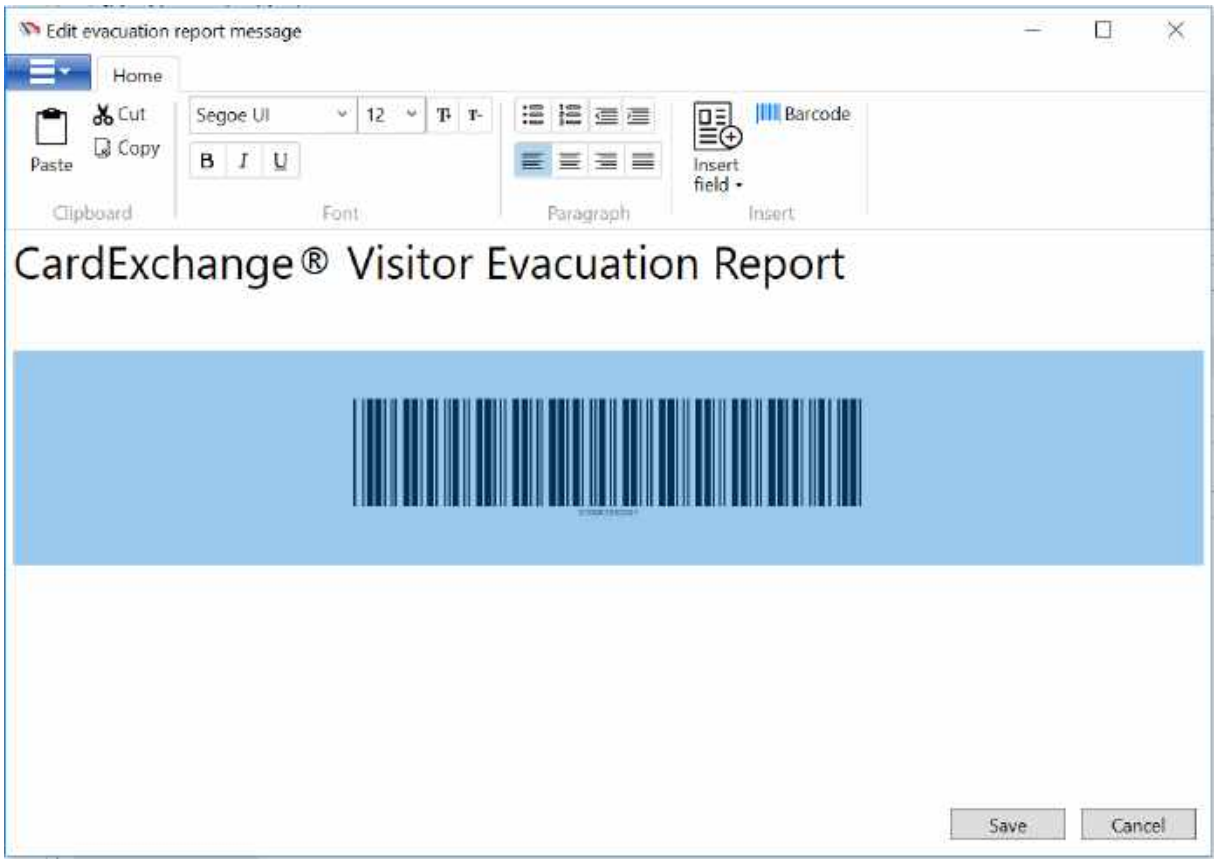

When clicking on Barcode, a Barcode will be added where the cursor is within the email. You can then position it as required by dragging it to the desired location.

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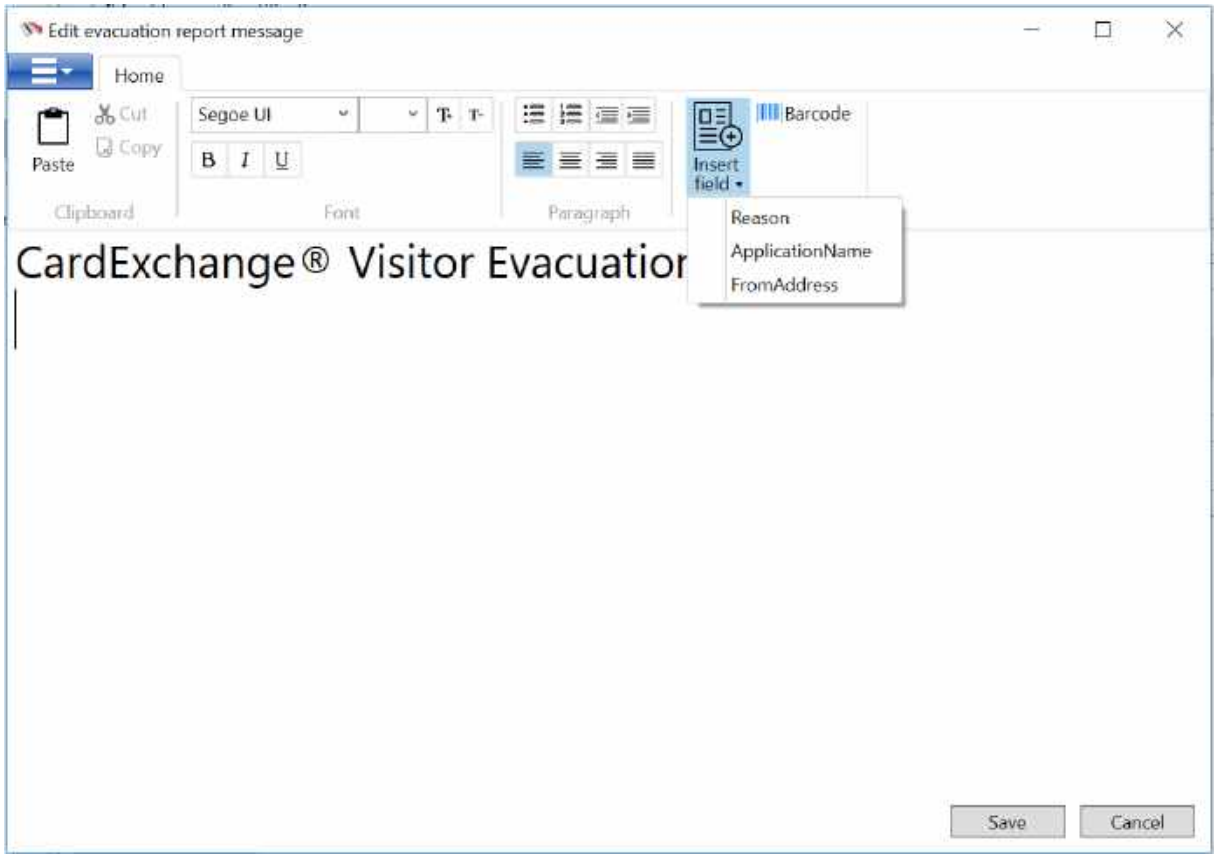

When clicking on Insert field you can choose from the available database columns to include in the email.

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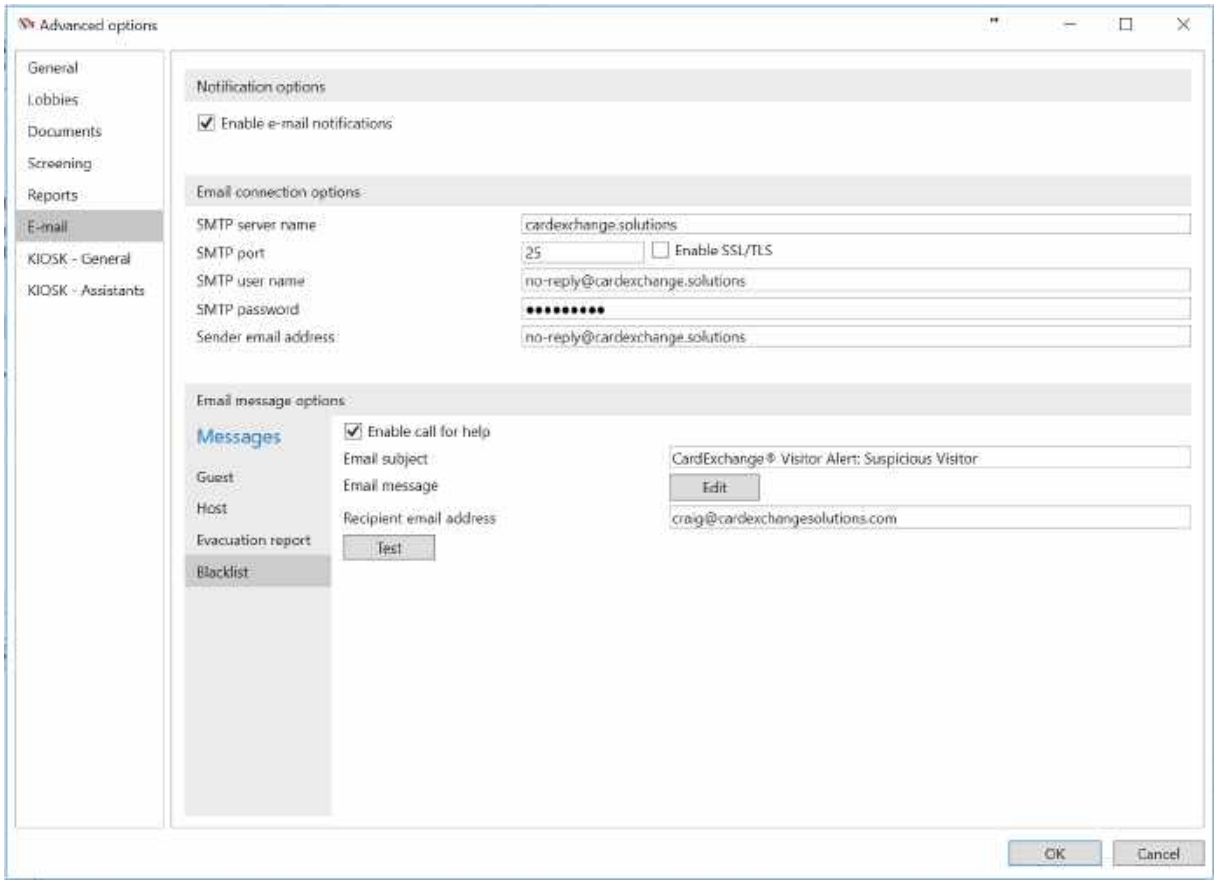
5.7.1.6.4 Call For Help Email



Under the blacklist section you can enable that when a blacklisted visitor tries to check in, a call for help button is enable that when clicked, sends an email to the specified recipient containing the name(s) and location(s) of the blacklisted visitor(s).

You have the option to change the email subject for the blacklist emails as well as sending a test email to the specified sender and editing the email message.
An overview of the email editor can be found here 221.

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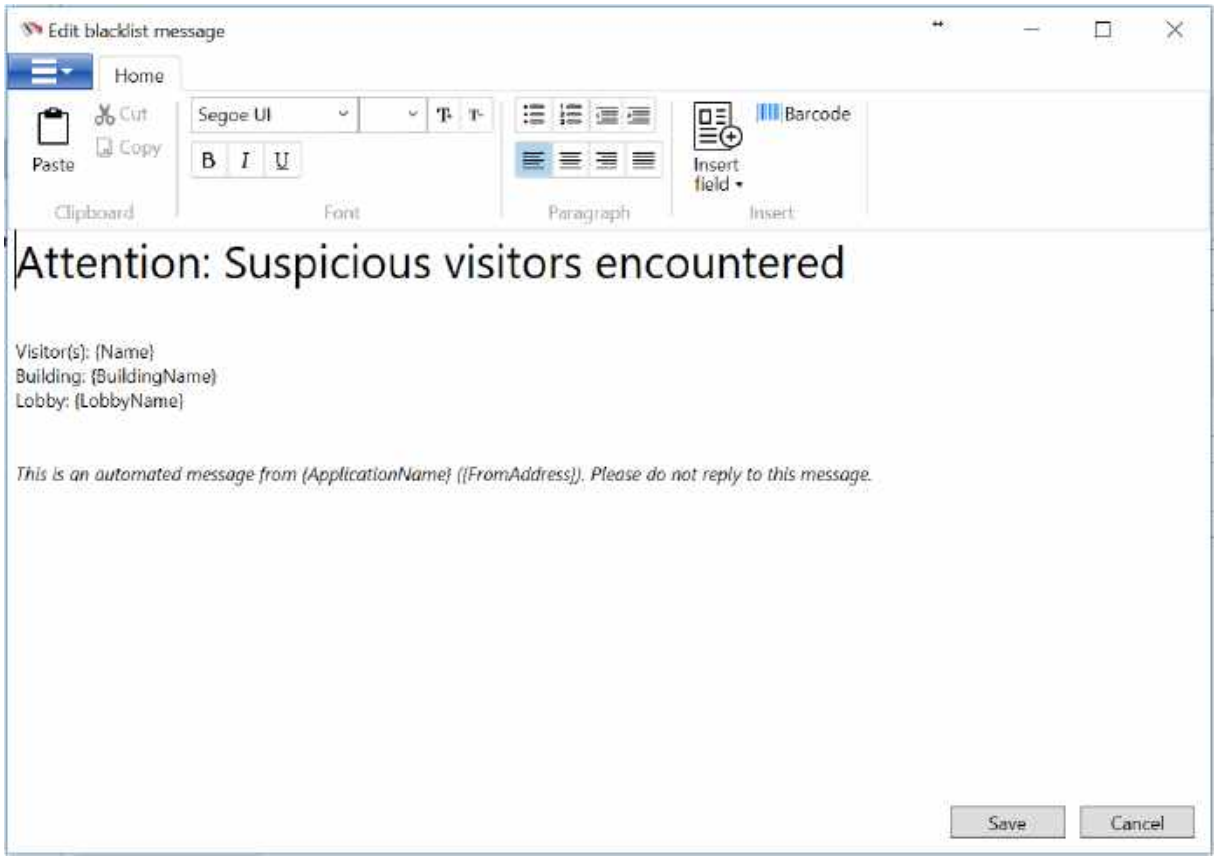
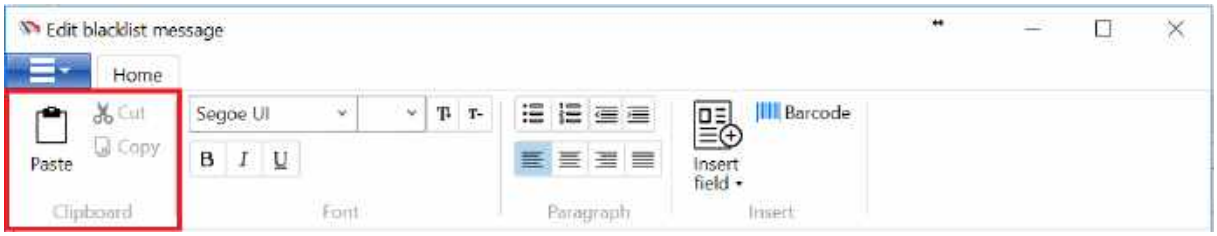
5.7.1.6.4.1 Edit Call For Help Message



When editing the email message you are presented with the above screen, you can type text directly into the editor and format it using the options in the ribbon.



Under the Clipboard section you can paste in text copied from elsewhere, you can also cut and copy text.

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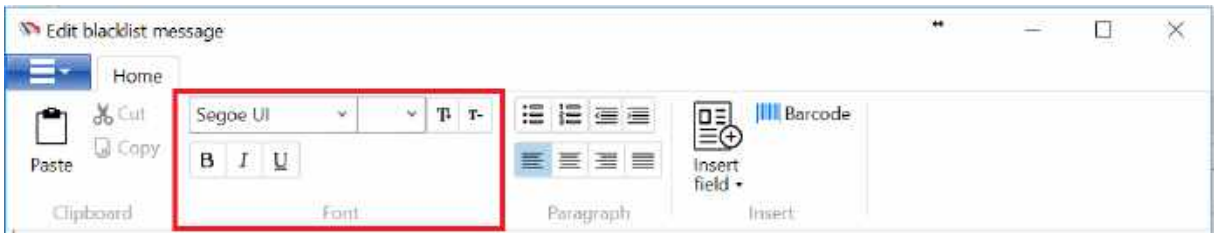
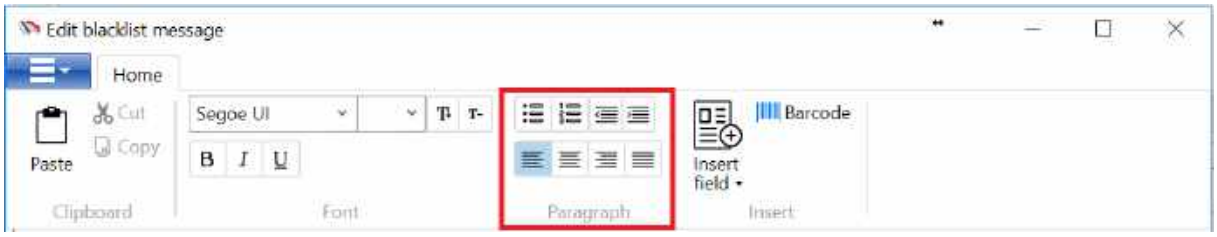


Under the Font section you can set the desired font, size and style.



Under the Paragraph section you can change the formatting/alignment for the selected text.

Under the Insert section you can add a Barcode to the email as well as fields that are linked to the database.

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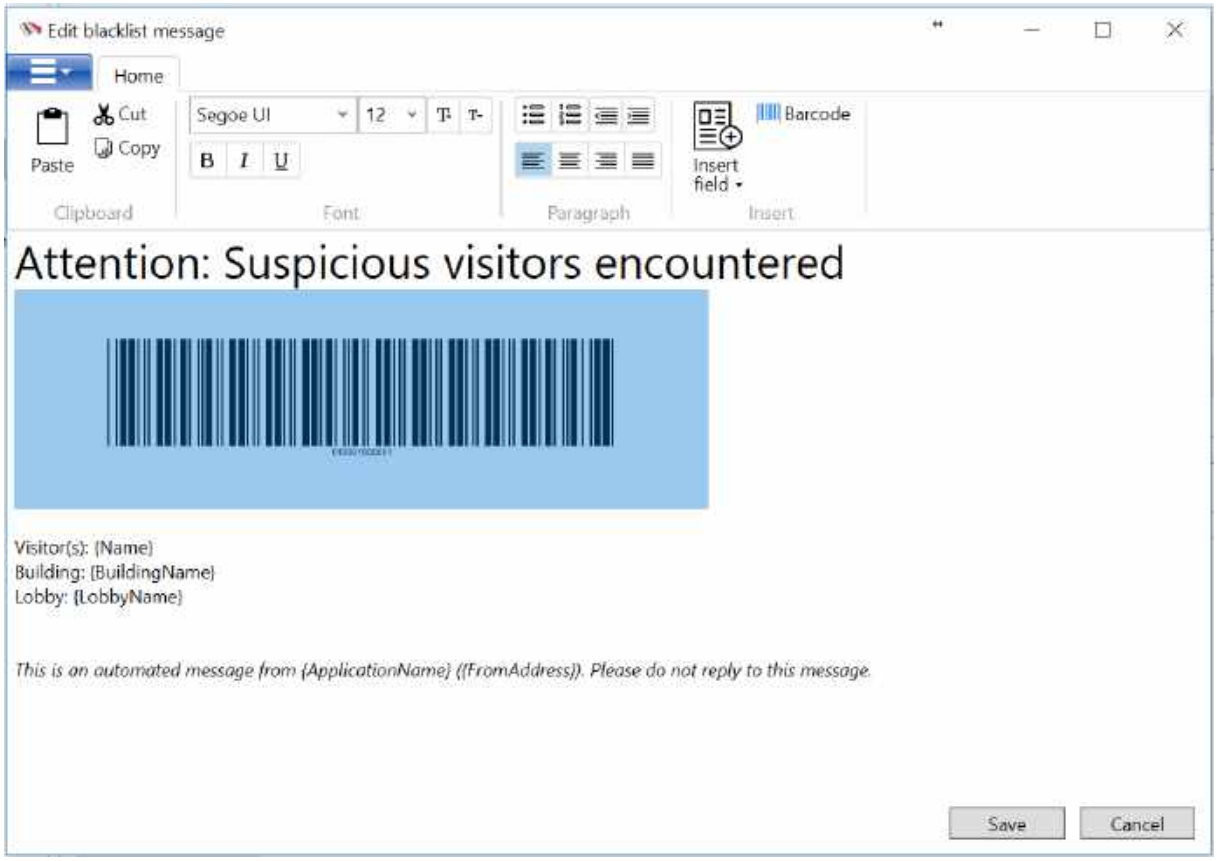

When clicking on Barcode, a Barcode will be added where the cursor is within the email. You can then position it as required by dragging it to the desired location.

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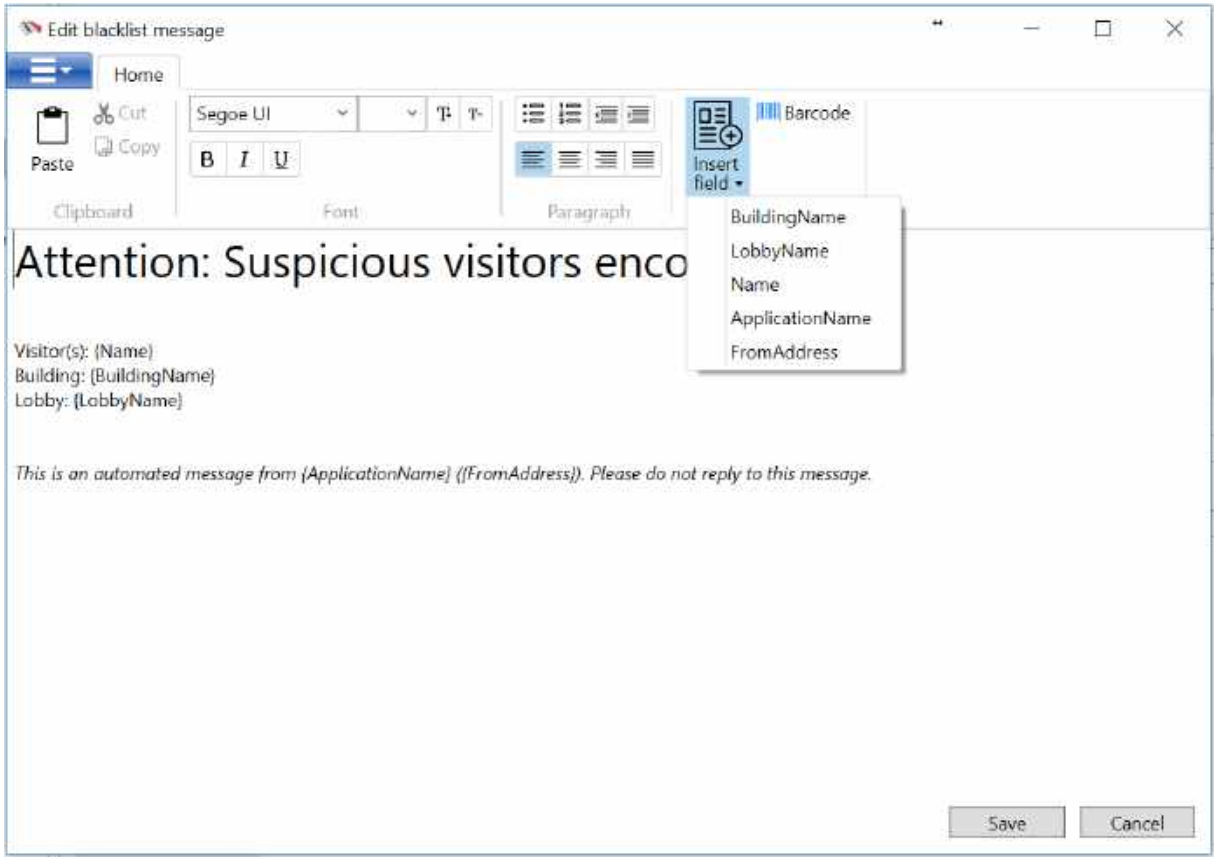

When clicking on Insert field you can choose from the available database columns to include in the email.

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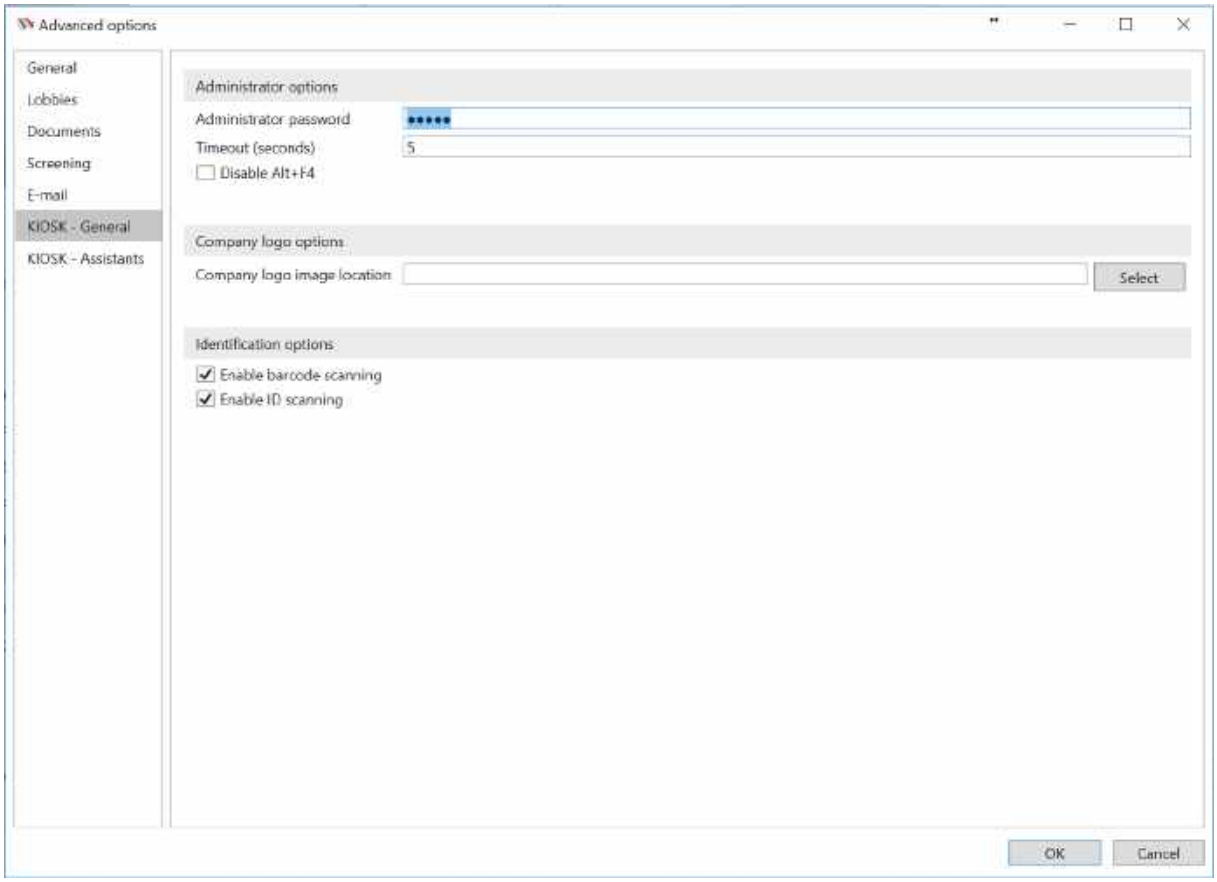
5.7.1.7 KIOSK



The CardExchange® Visitor Kiosk Client can be configured from a standard CardExchange® Visitor client installation.
There are options for the general setup and also the the setup of the assistants which will guide the visitor through the check-in process.

In the general setup you can change the Administrator password for the kiosk client (Default = Admin), you can set the default timeout value and you can disable the key combination that can be used to exit the Kiosk Client (ALT+F4).
You can also select the logo to be displayed on the kiosk screen, a preview is shown so you can check it.

You can also select the identification options that you want to be available for visitors to use when checking in.
By default barcode scanning is selected, but you can also select Id scanning if you have a compatible ID scanner.

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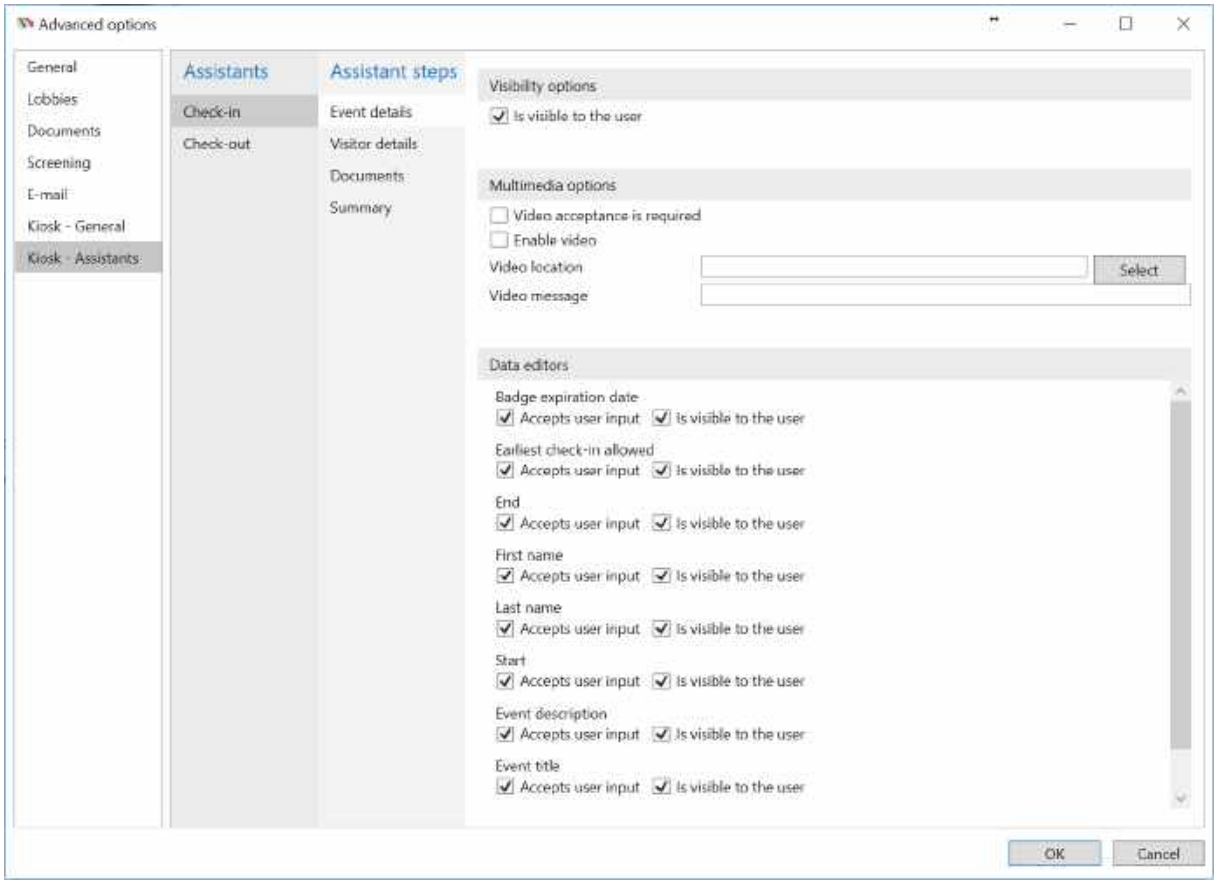
5.7.1.7.1 KIOSK - Check-in Assistants



For each step in the check-in process you have a number of options available, you can also choose not to use certain steps if you have no need for them.

You can specify that a video should be played and that it needs to be accepted by the visitor before they can complete the check-in process, this could be for example a health and safety video or a fire safety video.
You can specify the location for the video along with a message that is displayed.

For each step you can specify whether each available Database field is visible and whether or not it should accept input from the visitor.

You can also specify the same options for the check-out summary step.

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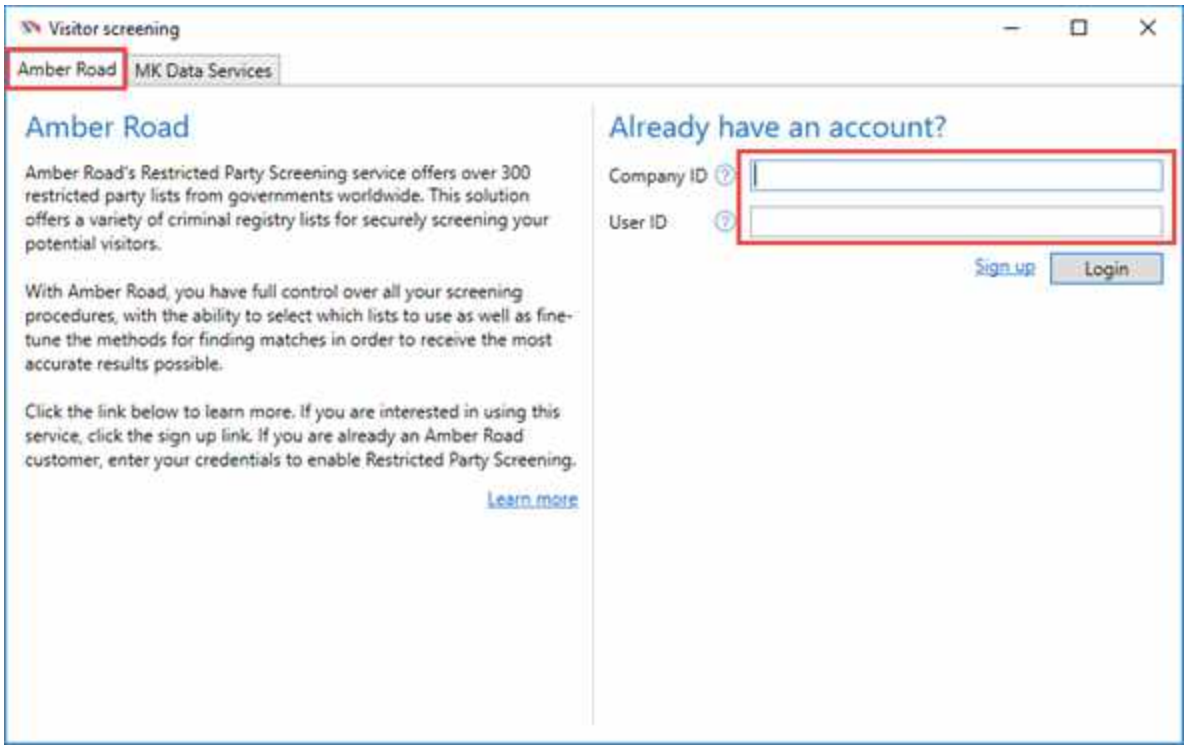
5.7.2 Visitor Screening

CardExchange® Visitor Business Edition is offering visitor screening via criminal and sex offender database systems of Amber Road and MK Data Services. CardExchange Solutions does not provide subscriptions for these screening services. To use these services, a separate subscription will have to be purchased from these companies. For all available services we offer direct links to their websites.

If you have purchased a subscription for one of the supported services, you will receive credentials that will have to be entered into CardExchange® Visitor. To enter the credentials, click the Visitor Screening button in the Configuration tab and the Visitor Screening window, as shown below, will open:



Select the tab offering the services that you subscribed too, enter the credentials, and login:

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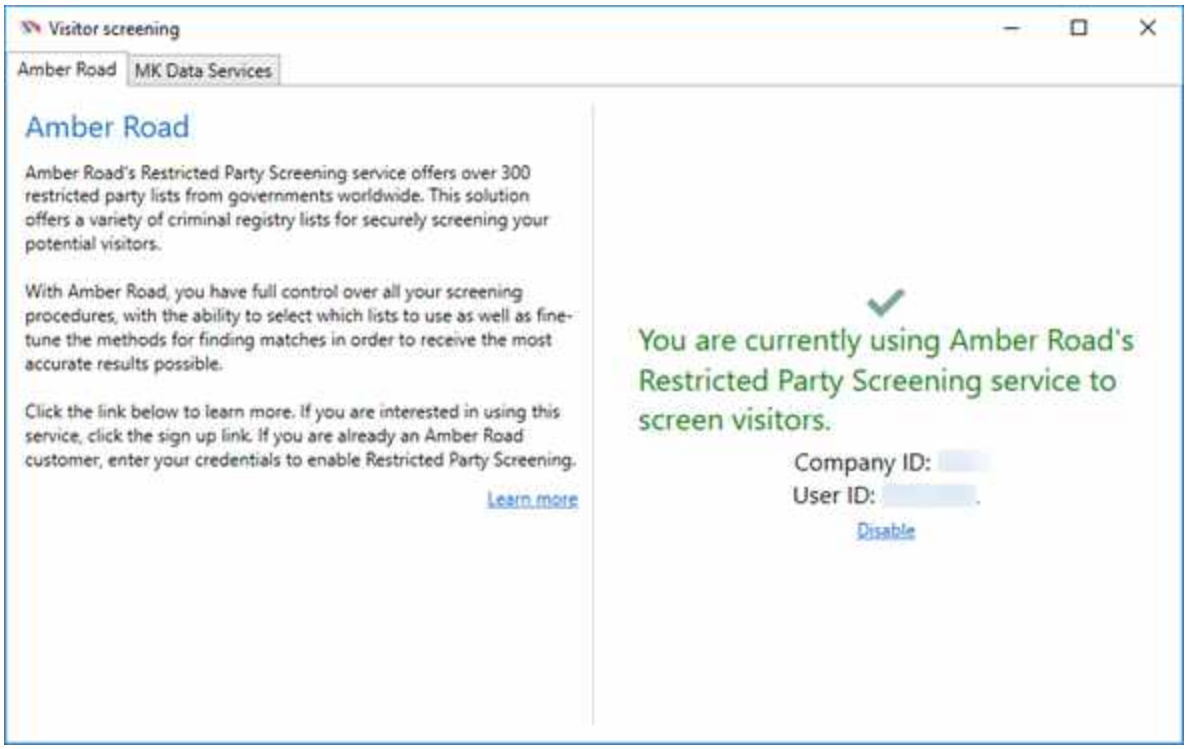

When you are using visitor screening with the Business edition, and you have obtained a subscription for these services, you can define in this window how the services apply to your situation. As default, the screening will always be done before check in.

Before the person is checked in, information of the person will be sent to the screening services and when a possible match is made, the window below will be show:

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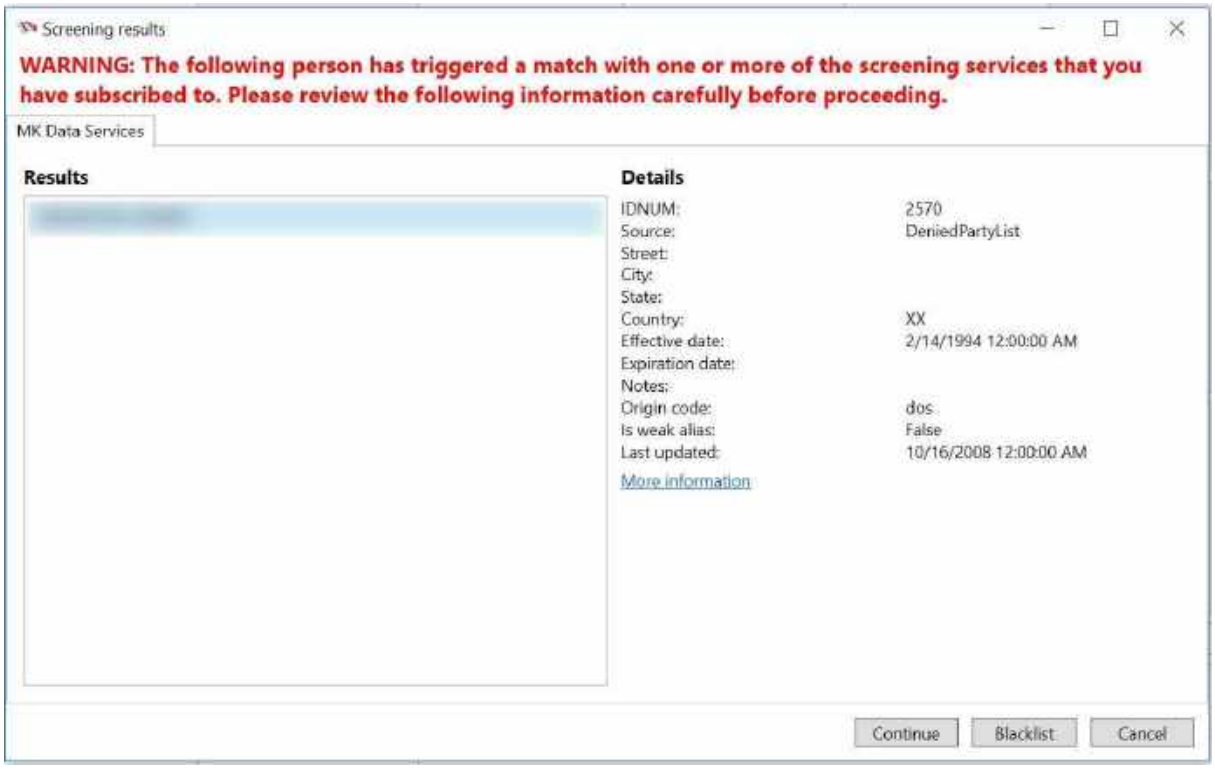

Continue will check the person in, Blacklist will put the person on the Blacklist of the visitor management system, etc.

You can set the screening during check in, when you add invitees to an event, or when you register an new visitor.

The system will continue to be logged in until you disable. When and how you screen your visitors can be defined in the Advanced Options window 201.

5.7.2.1 Call For Help

If you have the call for help option enabled under the email setup, when a visitor is identified using the screening feature you will also have a call for help button on the screening results window as below.
You can configure the call for help email option here 220.

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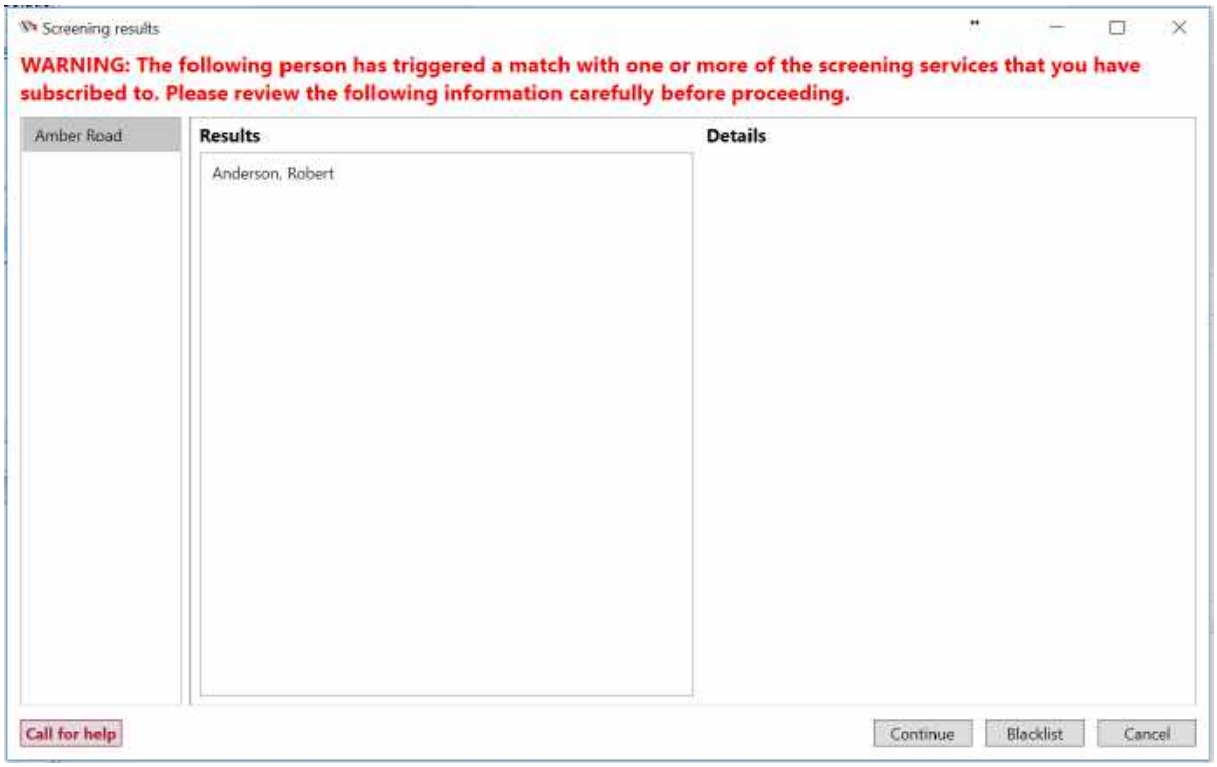
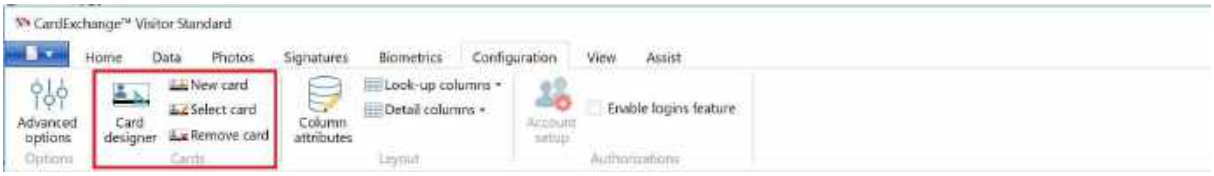


5.7.3 Cards



Under the cards section you can load the Card Designer 314 to edit the existing layout, you can also create a new card, select another existing card or remove the selected card.

5.7.4 Layout

Under the Layout section of the ribbon it is possible to edit the column attributes 233 such labels, font sizes, text masks etc. as well as select the look-up columns and detail columns that are displayed.

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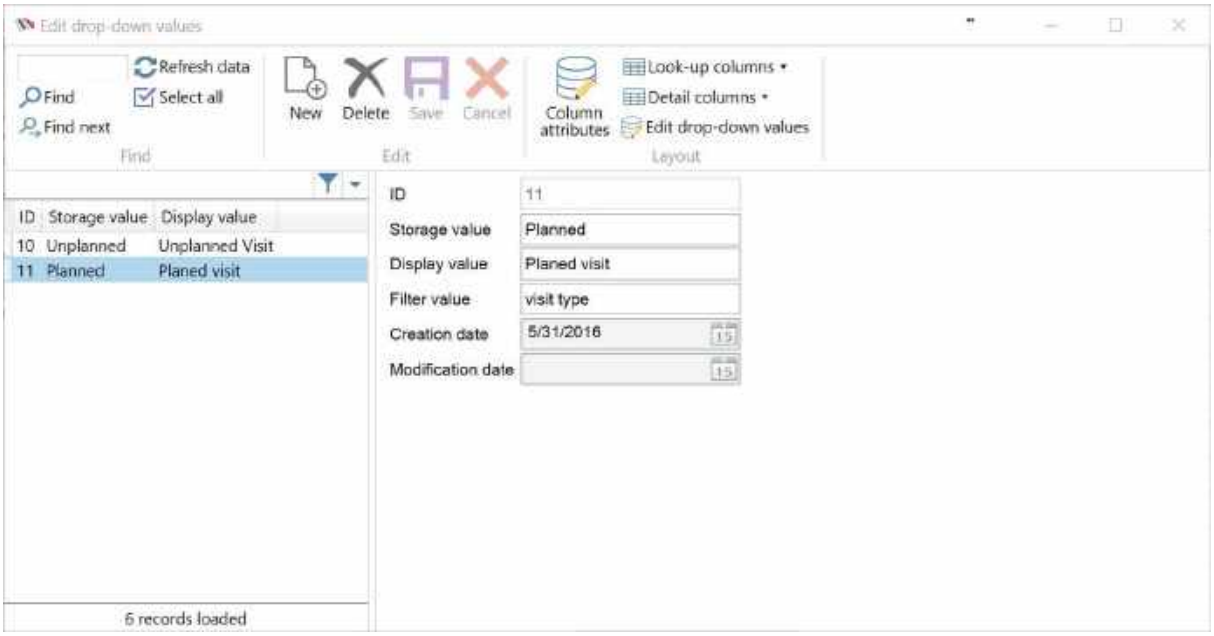
You can also configure drop-down values 231 to be used for columns where data entry is always from a selection of values.

5.7.4.1 Drop-down Values



It is possible to configure drop-down values to be used for columns where data entry is always from a selection of values.
For example you could use a field in the database to record if a visit was planned or not, then instead of typing manually each time you can select from the available options in a drop-down list.

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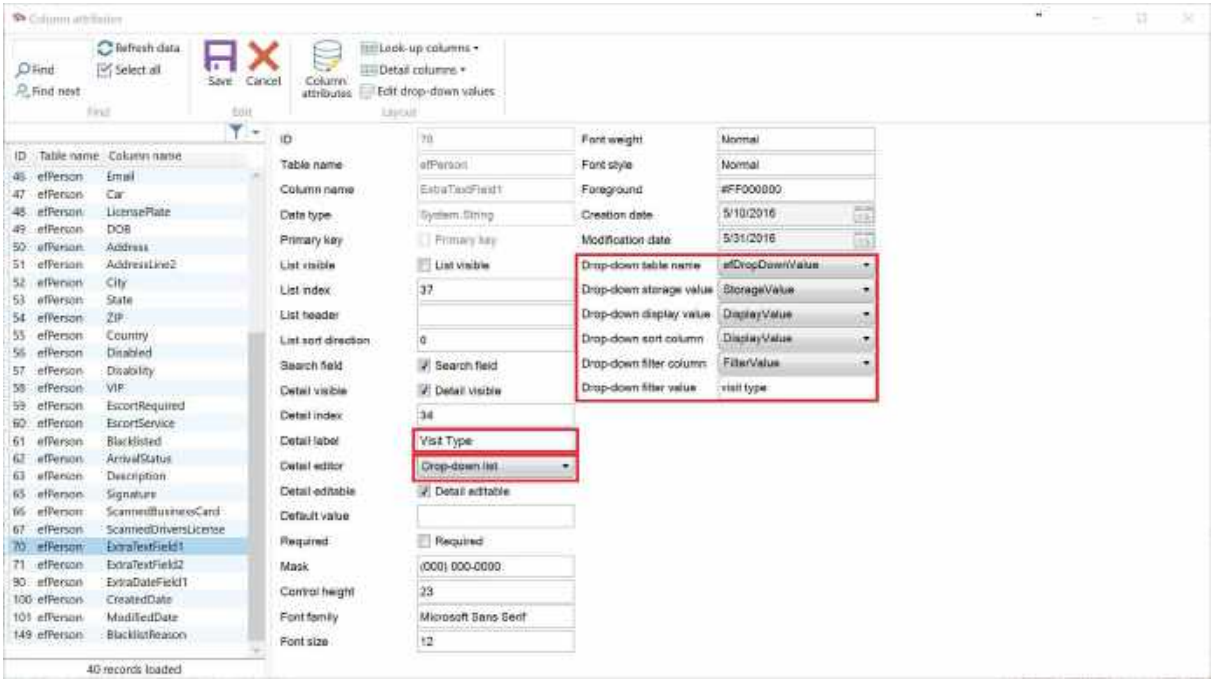

In the example above we have used the ExtraTextField1 field in the database, changed the label to be Visit Type, changed the field to be a Drop-down list and set the drop down properties to the drop-down settings that we set on the previous step.

Now when you either edit or add a visitor you can select the option from the drop-down list in the visitor details pane.

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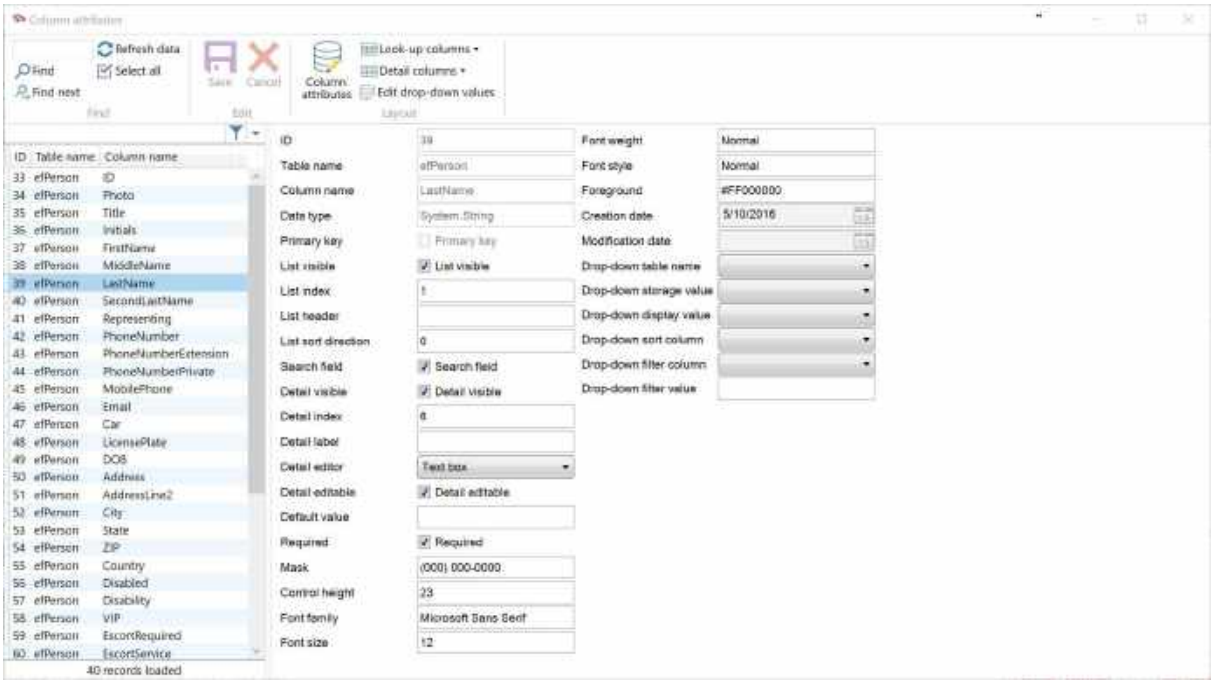
5.7.4.2 Column Attributes



For most tables available within the CardExchange® Visitor database it is possible to customize the column attributes.
Below are the options for the efPerson table used to store all of the visitor details, however the same principal is valid for all of the other available tables as well.

List Options

List visible	Specify whether the column is visible in the names list of the visitors pane
List index	Specify the sort index of the list item
List header	Customize the column header that is shown in the names list
List sort direction	Specify a sort direction if required
Search field	Specify whether to include the column in search from the names list search box

Detail Options

Detail visible	Specify whether the column is visible in the visitor details pane
Detail index	Specify the sort index of the visitor details item
Detail label	Customize the column header that is shown in the visitor details pane

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Detail editor	Specify the type for the column, for example a text box or date/time picker
Detail editable	Spedify whether the column in the visitor details pane should be editable
Default value	Specify a default value for a column when adding a new visitor
Required	Specify whether a column should be a required field when adding a new visitor
Mask	Setup an input mast for a text box, for example a phone number format
Control height	Specify the height of the text box

Font Options

Font family	Specify the font to display for each column
Font size	Specify the font size to display for each column
Font weight	Set the font weight
Font style	Set the font style
Foreground	Specify the text color

Drop-down Options

Drop-down table name	Specify the table to use for looking up the drop-down values
Drop-down storage value	Specify the column to use when storing back the drop-down value
Drop-down display value	Specify the column to use for displaying the drop-down value
Drop-down sort column	Specify the column to sort the drop-down items by
Drop-down filter column	Specify the column to use as the filter for drop-down items
Drop-down filter value	Set the filter value to use to when looking up drop-down items

5.7.5 Authorizations

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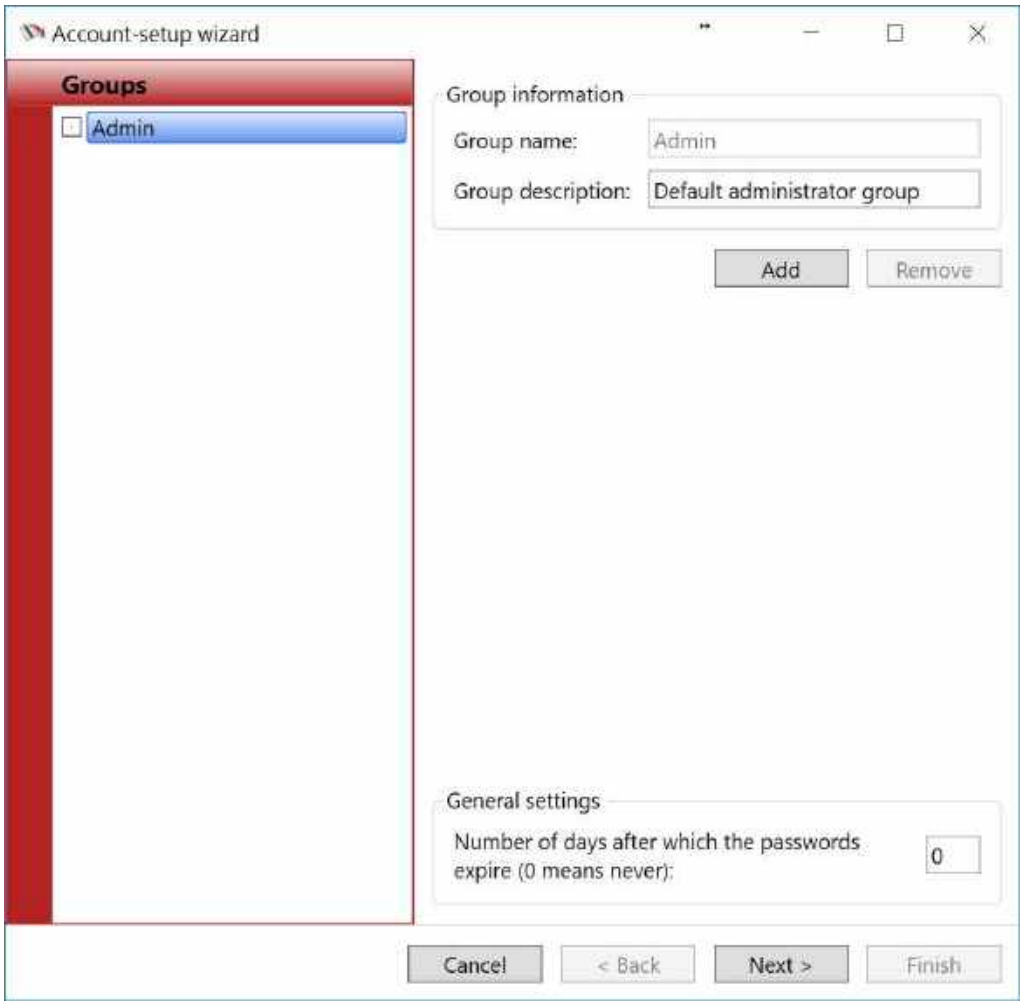
User Authorizations are created and setup for a reason, and that reason is **security**. From the Standard edition of CardExchange® Visitor, we offer advanced user authorizations with **login** functionality.

In order to create more control for the Administrators of CardExchange® Visitor, we offer the ability to create user authorization levels. This helps limit user infractions and protect areas within CardExchange® Visitor that the common user should not be utilizing. This high level security allows you to protect the software and functionality from user errors.

Setting up **User Authorizations** does not make any sense if you are not using a login mechanism therefore the first step is to select the **Enable logins feature** as indicated above.
When selecting a dialog will prompt for confirmation.



When you confirm this feature, the User **Account Setup Wizard** will start.

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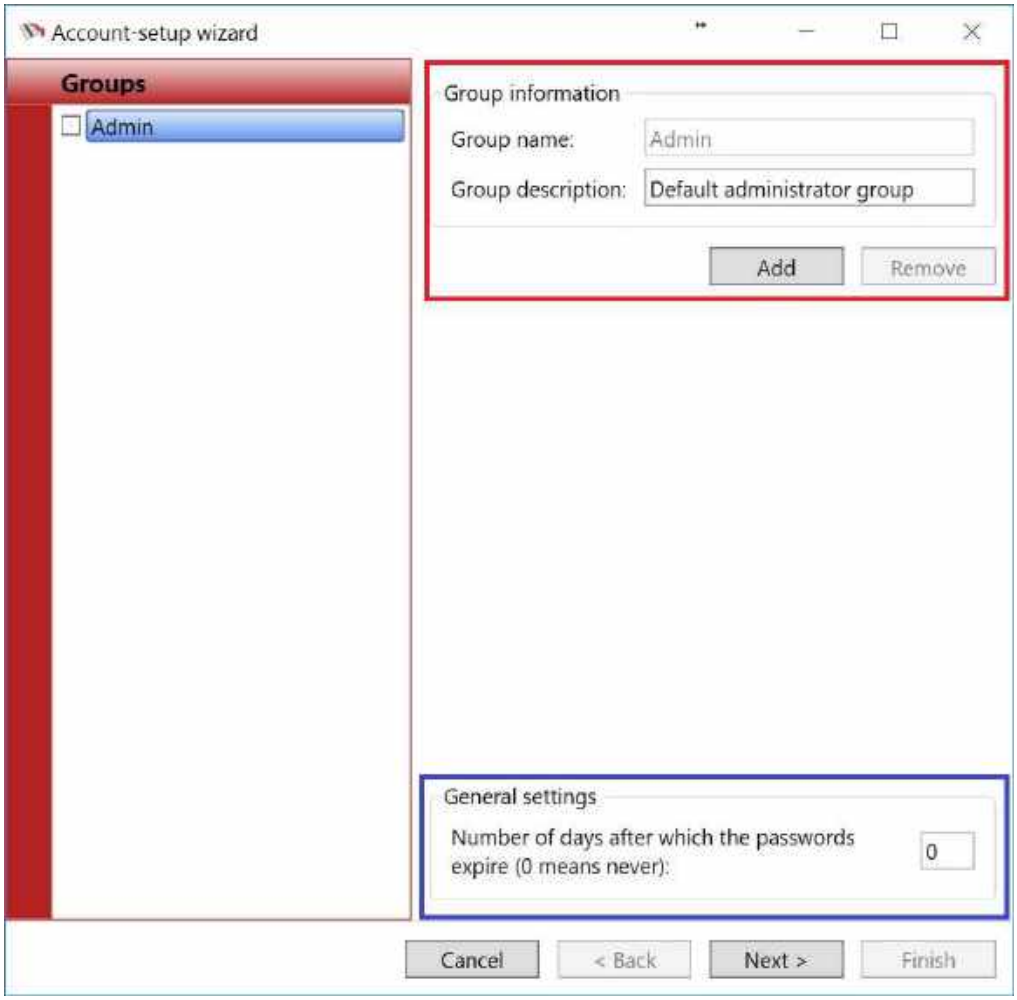
In the section Create User Authorization 236 we will explain how to create the **user groups**, **profiles**, and **users**. To disable the **User Authorizations**, **uncheck** the **Enable logins feature** check box, a dialog will pop up, select **Yes** to disable the functionality.

Authorizations are only available starting with the Standard edition which allows adding/managing users, then from the Business edit you can also add/manage groups.

5.7.5.1 Create User Authorizations



Creating **User Authorizations** starts with creating and/or managing groups. In this first page of the wizard you find two important areas; The **Group information** group, indicated with the **red rectangle**, and the **Authorizations general settings**, indicated with the **blue rectangle**. The explorer on the left side shows all the available and created groups.

*Important! There is always one group available; the **Admin** group. This group cannot be removed.*

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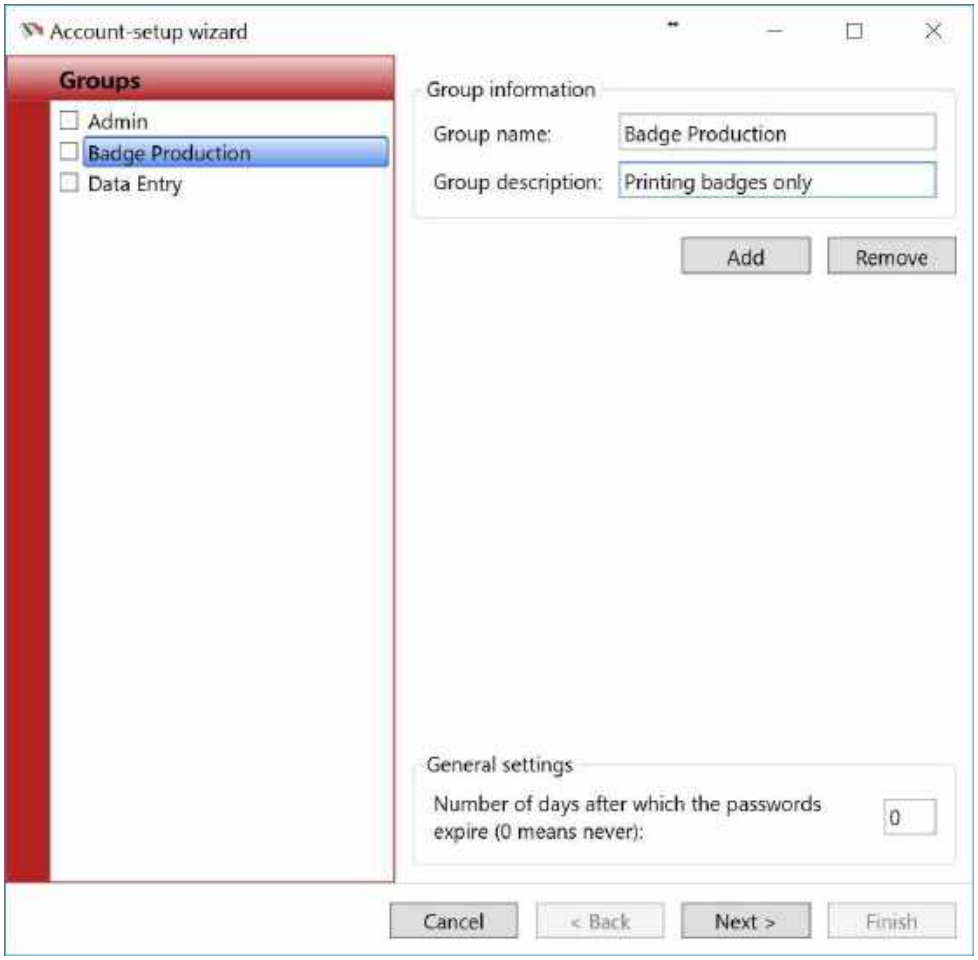
With the **Authorizations general settings** group you can indicate when the passwords need to expire. For example, putting in **30** means that after 30 days all users, when they login, **are requested to change their password**. When leaving it to **0**, **passwords will not expire**.

In the Group information section you see the Group name and the Group description. It also contains the Add and Remove button. To Add a new group, click on the Add button.



You can now enter the Group name, make sure you chose logical names, and a Group description.
The new created group will appear in the explorer on the left side as indicated.

In this example we have created a group for data entry, and a group for badge production. There are no limitations on the amount of groups you can create.

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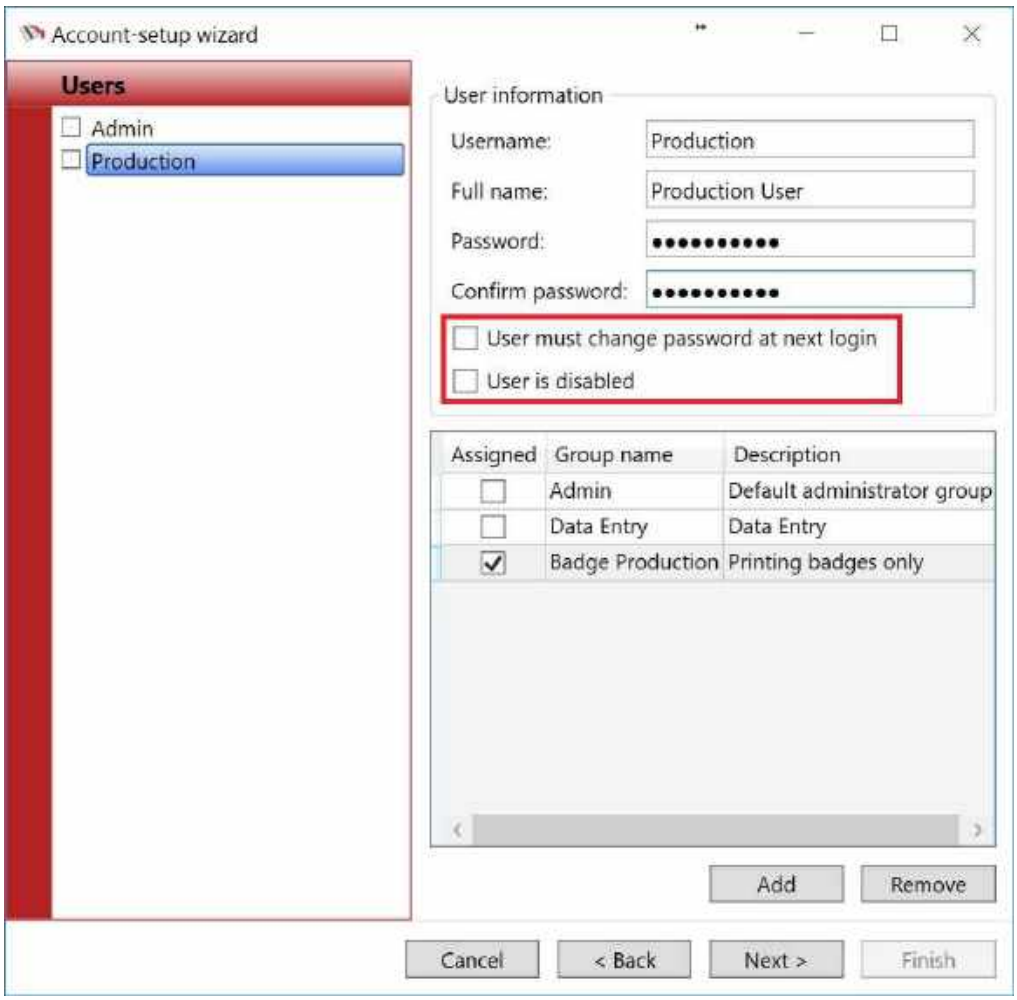
If you want to delete a created group, just select the group in the explorer on the left side and click on remove. Confirm with Yes to delete! Deleting a group does not delete your users!

When you are done adding groups you can proceed to the next level of the wizard by clicking **Next**.

User Management



In this page of the wizard you can create new or edit existing users of the system. On the explorer on the left side you can find all the available users, on the right side you can find all the user information.

When you click on **Add**, to create a **new user**, you will need to provide a **User name**, this is the name used to login to CardExchange® Visitor, enter a **Full name** of the user, and enter a **Password** and **Confirm the password**.

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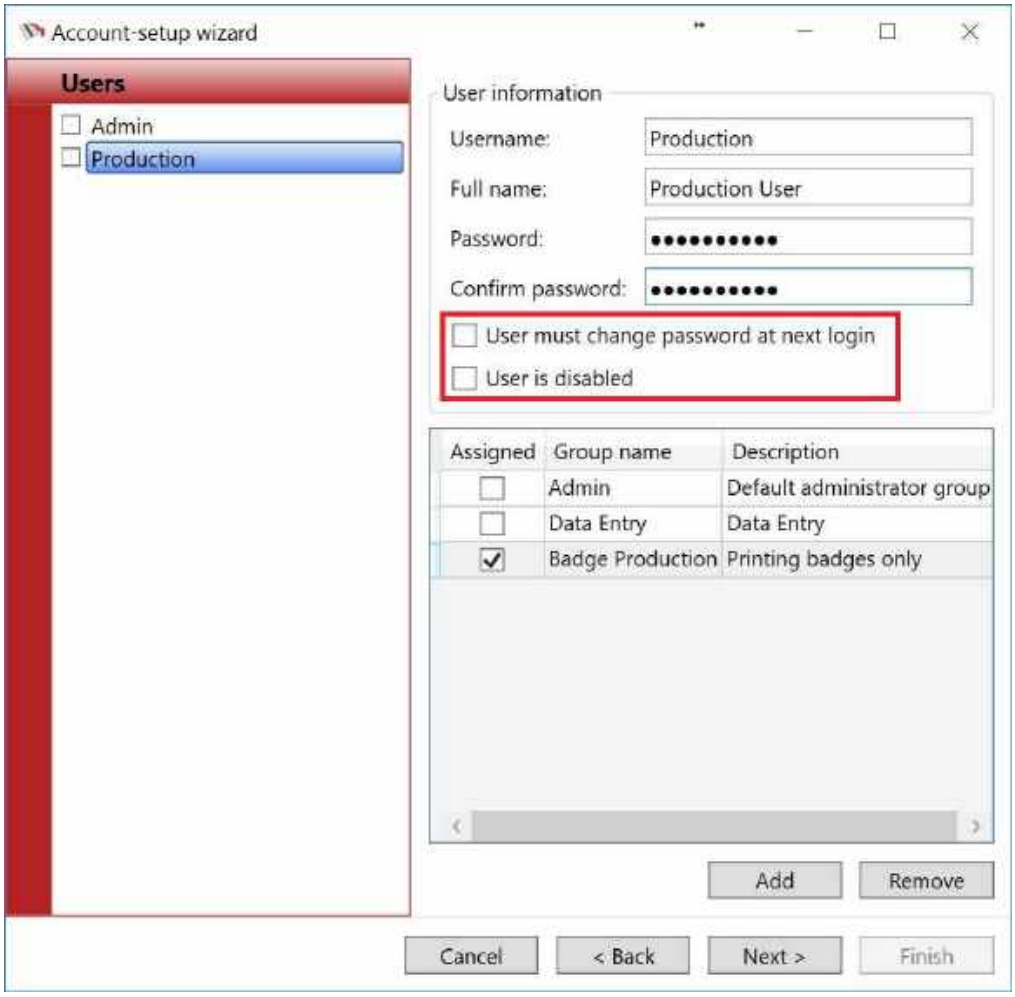
Just like in the Group Management page of the wizard, we also have one special user; Admin. The Admin account cannot be removed! What you can change is the password of the Admin user and we advice to do so but keep in mind changing the password means that you need to remember the password. There is no option to retrieve or reset the Admin password.

The **default user name** for the **Administrator** account is **Admin** and the **Password** is **Admin** too! Passwords are **case sensitive**!

Important! ***The Administrator has always access to all defined groups and users!***



In the area indicated with the red rectangle, you find two special options. If you want the user to generate their own password, just check the box **User must change the password at next login**. This can be handy if you have a lot of different users to create but you do not want to send out all these different passwords. When you select this option, you can simply use a standard password which first needs to be changed before the user can login to the system. If you have, like in this example, a group account it is better not to use.

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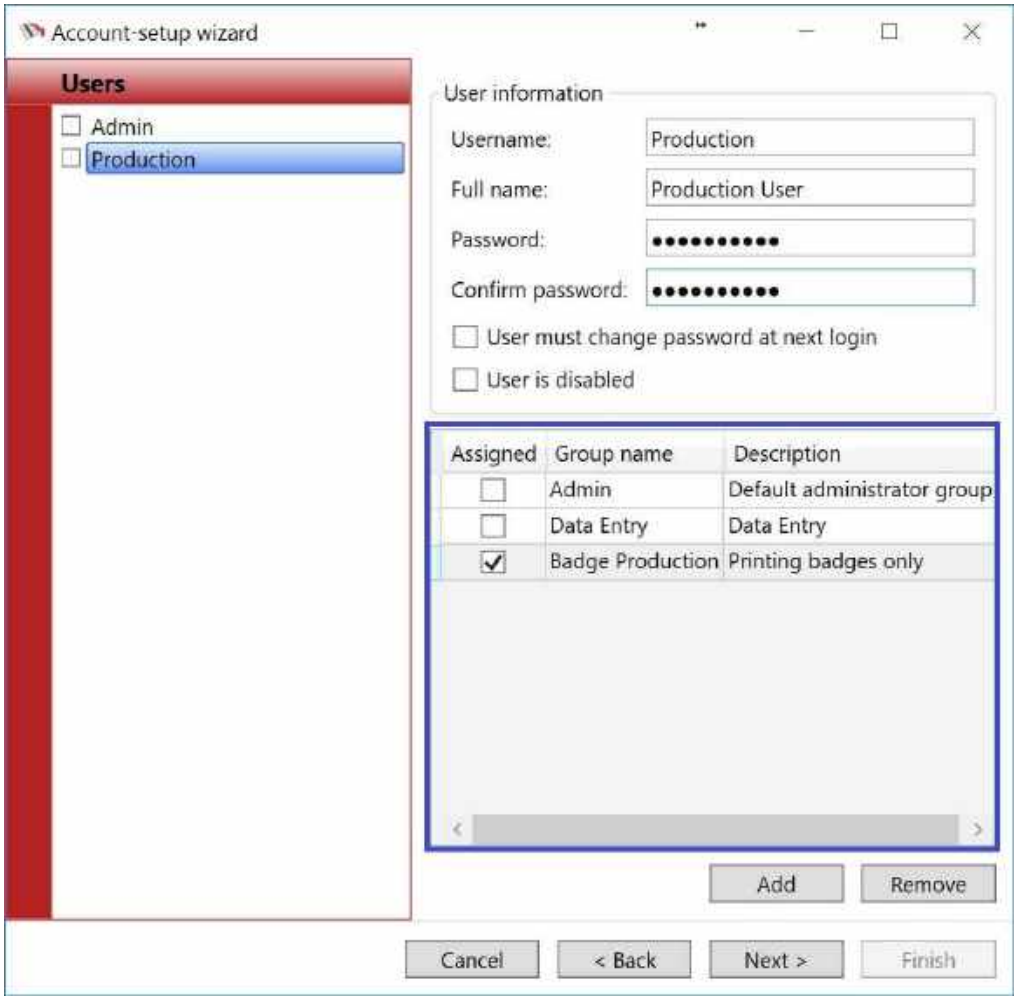
Disabling the user is also a handy option. By checking this box, the user cannot login to the system anymore but is not removed from the system. If later the user needs to get access to the system again, simply uncheck the **User is disabled** box and access is granted again.



In the section indicated with the blue rectangle you can specify per user to which group it will be assigned. Each user can be assigned to one or multiple groups. In this example, it makes sense that the Production user is assigned to the Badge Production group but you can imagine that some users need to have access to multiple groups.

When you have created or edited all your users of the system and assigned them to the correct groups, you can proceed with the **Authorizations management** on the next and final page by clicking **Next**.

Authorizations management

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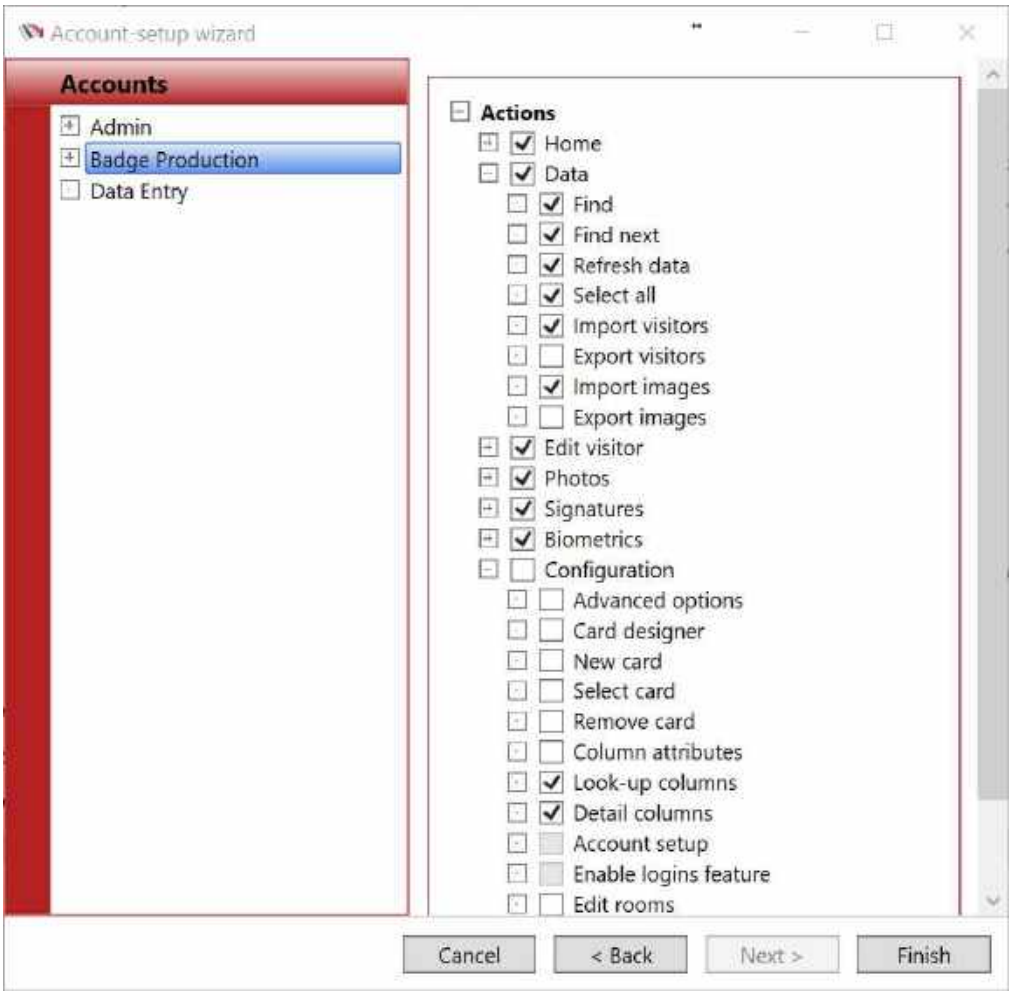

In this last page of the wizard can assign and create the profiles per defined group or specific user. In the explorer on the left side you can see all the created groups. If you click on the expand sign ⊞ you can see the assigned users of the group.

On the right side, you have nine separate sections dividing the available CardExchange® Visitor functionality. When you click on the expand sign for each section, the corresponding functionality will be shown. For example, in the Data section, all options for finding/importing/exporting are shown. Each section and each functionality has a check box indicator. There are basically three options

☐ **No access to functionality**

This means that the functionality is not available in the interface. It is not greyed out, it is totally removed.

☑ **Access to functionality**

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This means that the functionality is available for the user of the system.

Administrator or selected users and groups only

This means that the functionality is either enable at a group level, or it is functionality that cannot be disabled (Such as the "About CardExchange® Visitor" button)

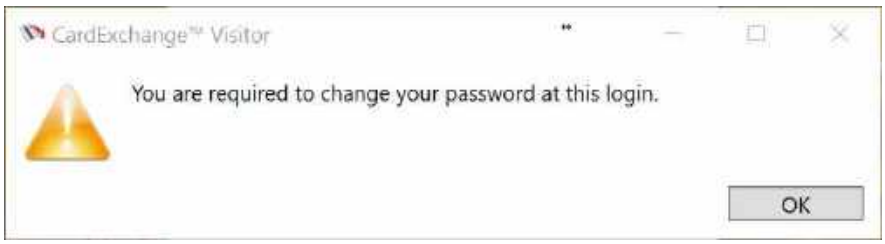
Besides creating the policies for the groups, each separate user can have some aditional rights besides the group profile. Simple select the user name from the explorer on the left and set the aditional authorizations for this user.

When you have defined all the groups, users, and assigned to the functionality allowed for this group and/or user, you can click on Finish to store your account definitions and close this wizard.

5.7.5.2 Users Login Access

When User Authorizations is enabled, every time CardExchange® Visitor starts, the user have to login. If it is a new account, it can be that the Administrator has set the option to change the password at first login. When that is the case, the the standard login window will appear as show below:

When the user enters his User name and password, and the Administrator has set the option to change the password at first login, the message as shown below will appear:



To confirm this action you have to click OK and the Change Password window will appear:

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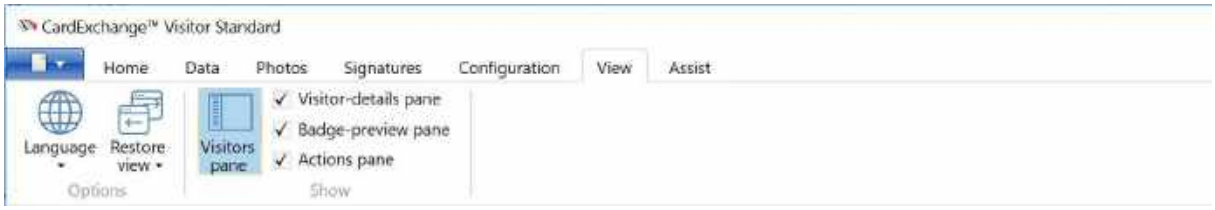
Enter a new password and confirm the new password and click on OK. If the User name and Password match, CardExchange® Visitor will load.

5.8 View



Under the view tab it is possible to set the language for CardExchange® Visitor, restore the view to the previous or default view and to hide the Visitor-details pane,badge-preview pane, Actions pane if it is not required.

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5.9 Assist

With the release of CardExchange® Visitor we bring unique innovation to your desktop by offering everything that you need to produce cards in a fast and secure way at hand in **CardExchange® Visitor Assist**.

Help, Forum, Videos, etc., it is all available in this section of your CardExchange® Visitor product. When you enter the Assist view by selecting the corresponding tab, you will directly see an Outlook style interface showing on the left the available news items and on the right the content of this news item.

CardExchange® Visitor uses this section to keep you informed about new updates and release plans so you will always be able to run the latest version. But also the reseller who has sold the product to you will keep you informed about his latest and greatest.

Take a look at the separate subjects in this 288 section of the Help file and see how this is going to benefit you!

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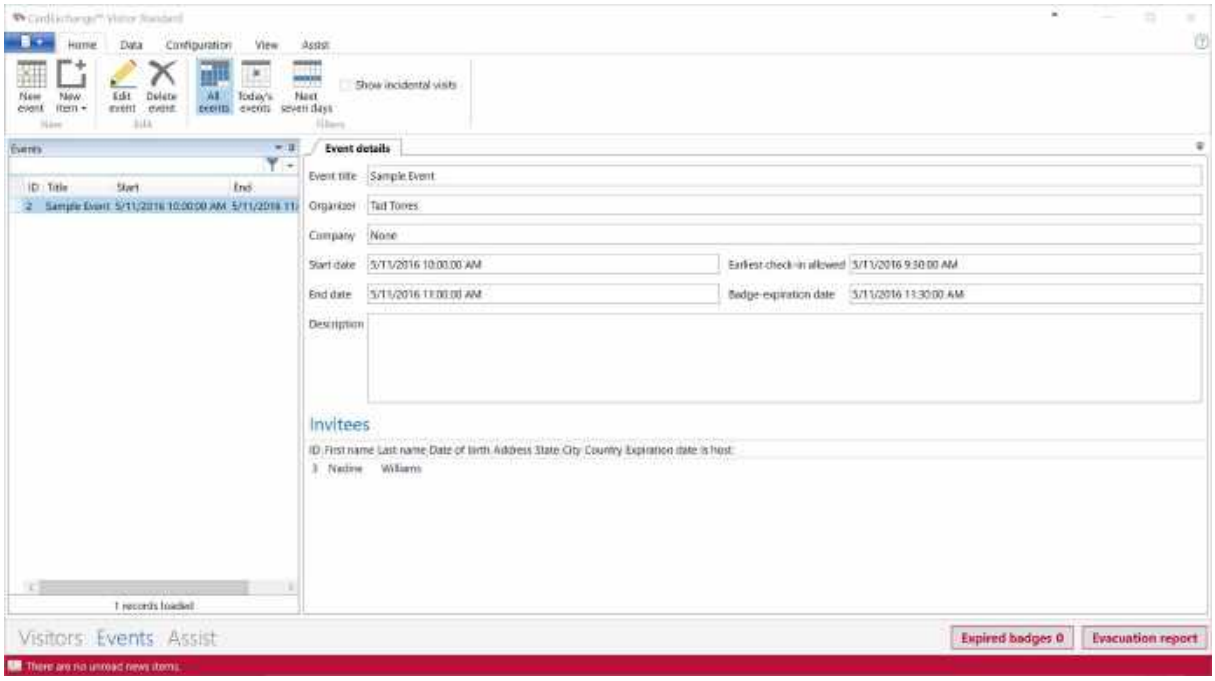
6 Working With Events



In the Events view you can carry out all the operations associated with Events, you can add/edit events, use filters to show upcoming events and add new visitors, etc.

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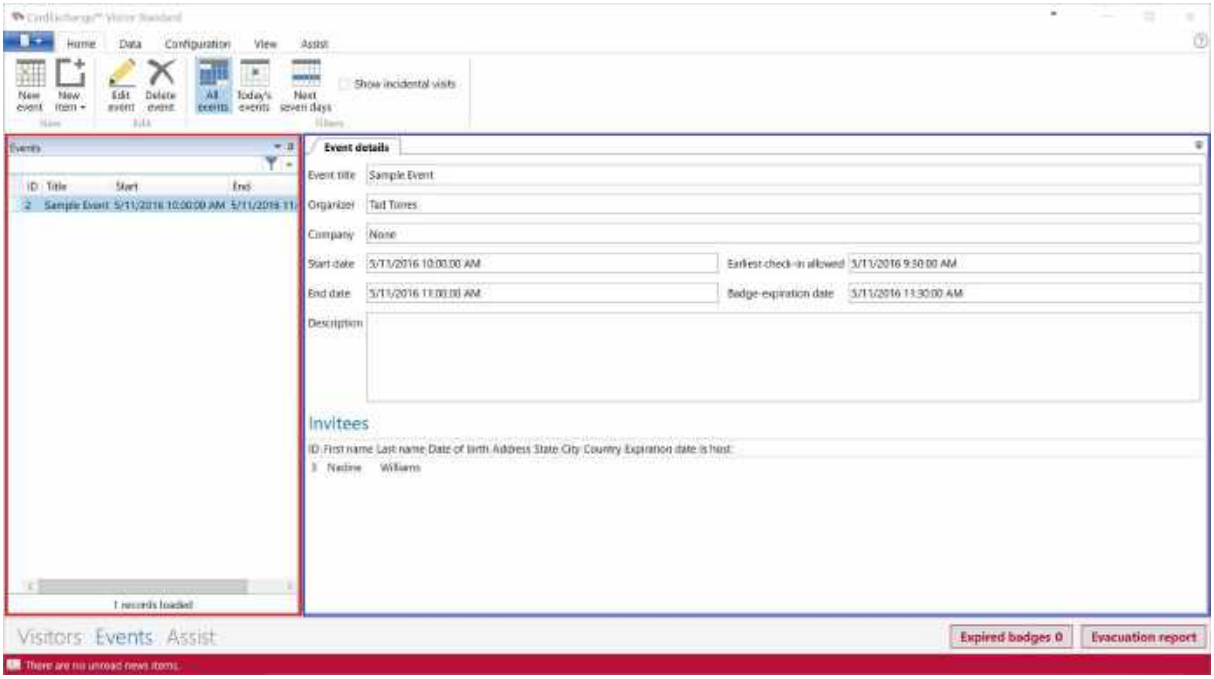
6.1 Layout



The Events view has two panes that can be moved, resized or hidden based on the users preferences.

- The Events pane (Shown above in red) shows a list of all the events.
- The Event details pane (Shown above in blue) shows all the available data for the selected event including Invitees.

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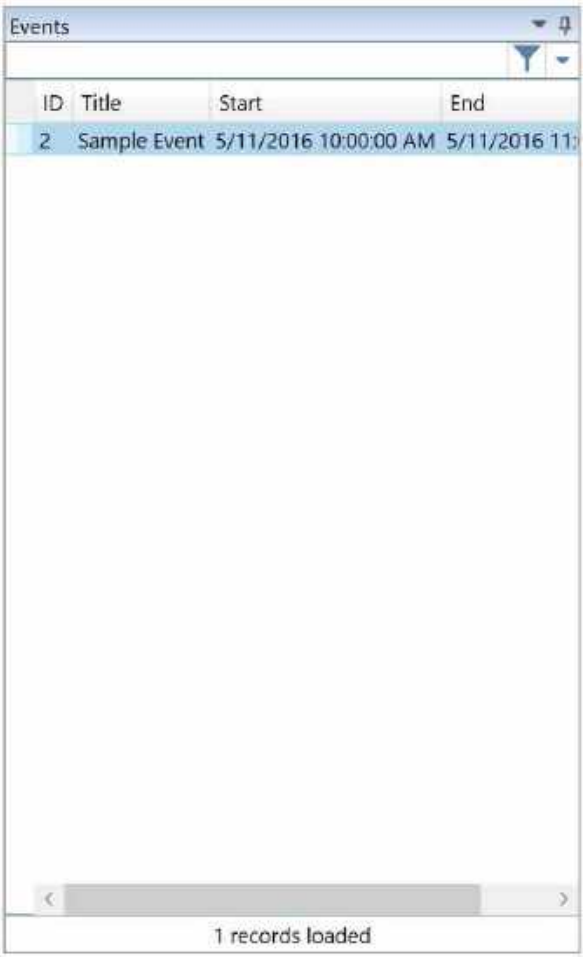
6.1.1 Events Pane



In the Events pane of CardExchange® Visitor you see all the events presented that are available in the database. In the configuration tab you can set the Look-up columns that are displayed in the Events pane.

Record Sorting

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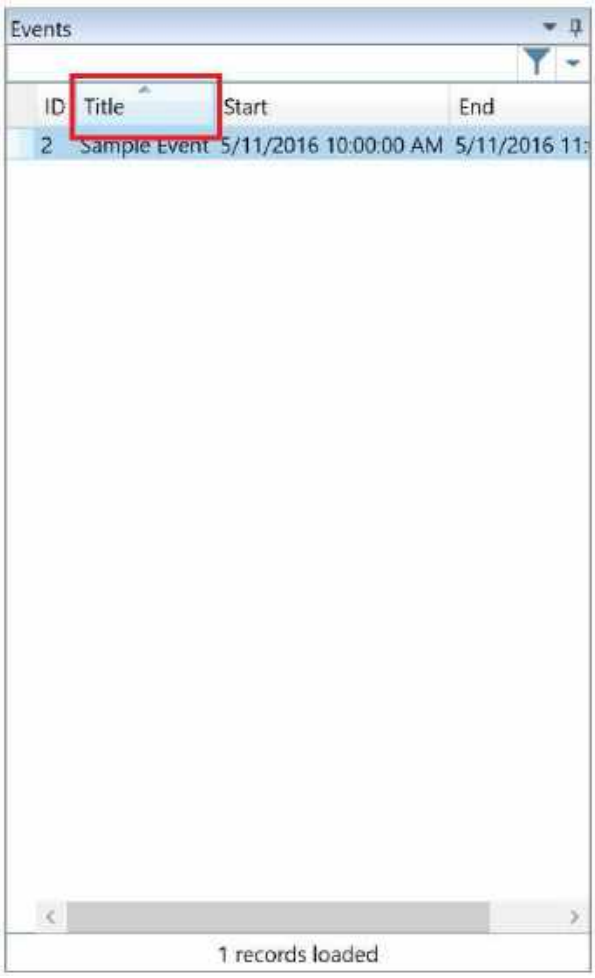

The Events pane is a so called data grid showing all your available events divided by columns. Sorting the events is just as simple as clicking on the column.

Record Look Up

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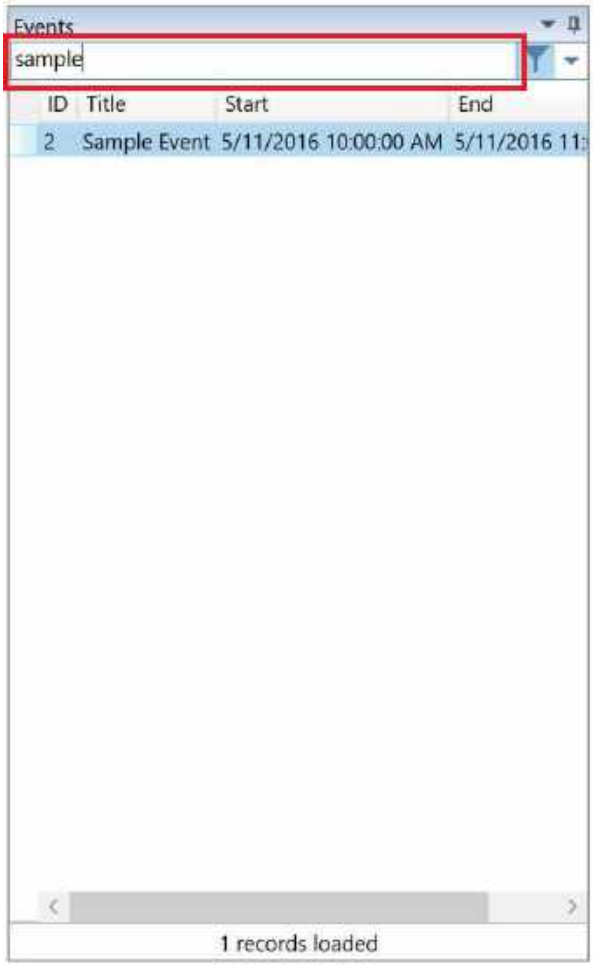

It is very simple to search for records inside the Events pane. Enter the text that you want to search for in the text box directly above the columns.

Loaded Record Information

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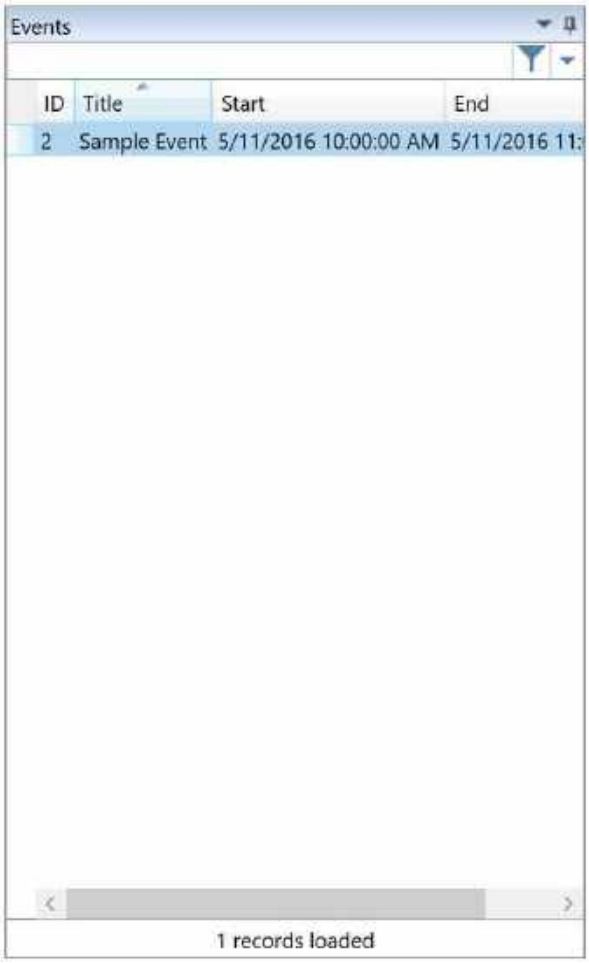

In the footer of the Events pane the total amount of loaded records is shown.

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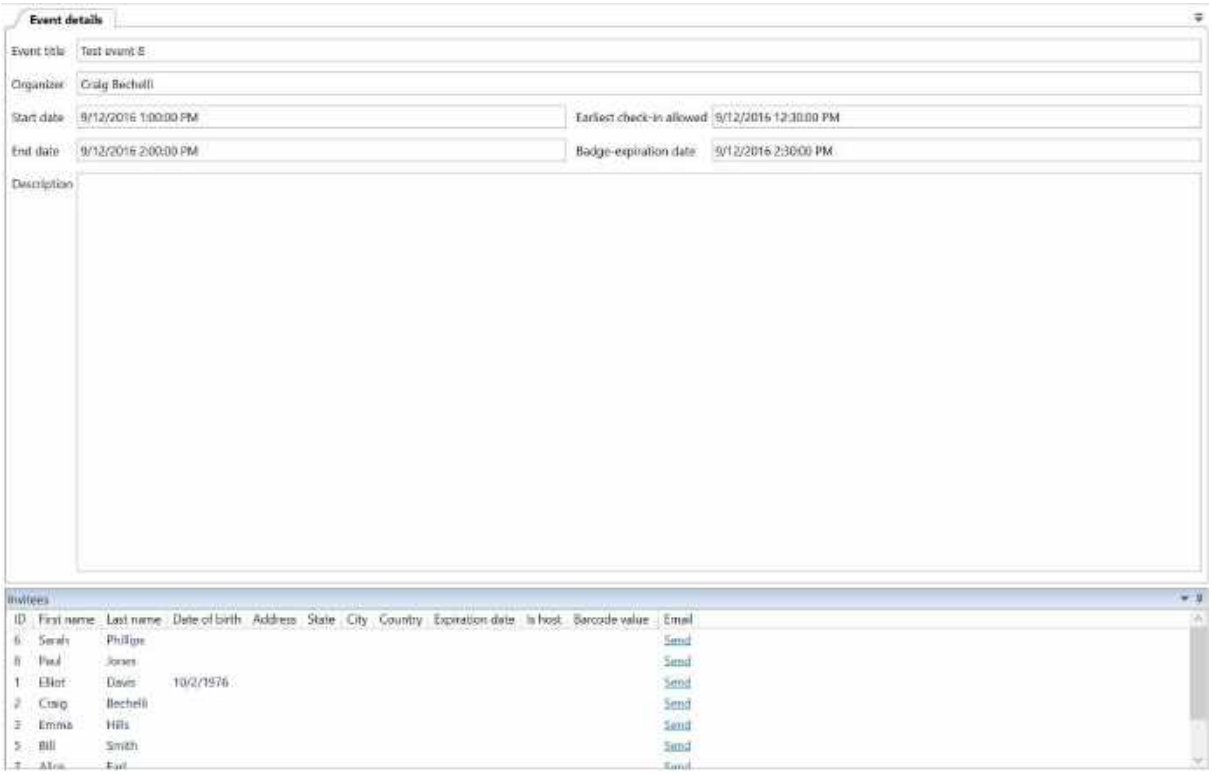
6.1.2 Event Details Pane



The Event details pane shows the main details for the selected event including start/end times, the organizer of the event and earliest check-in/expiration times.
Also shown at the bottom is a list of the invitees, their details including the barcode value and expiration date and an option to resend the invitation email to the individual.

6.2 Home

From the Home tab of the Events view it is possible to carry out the most common functions required in the use of CardExchange® Visitor.
In this section of the Help file we will go over all the functionality available like adding events, using Filters etc.

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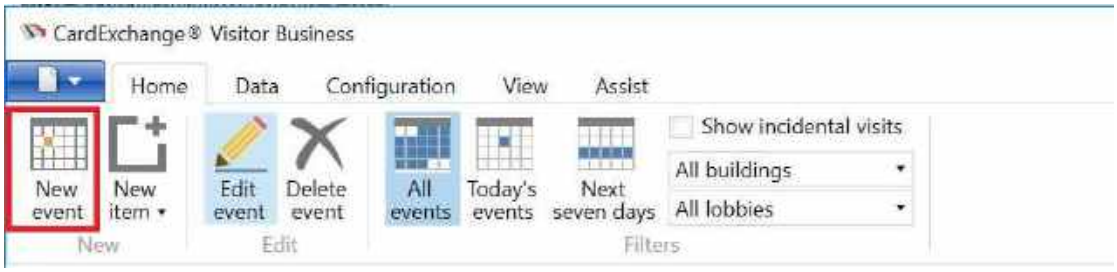
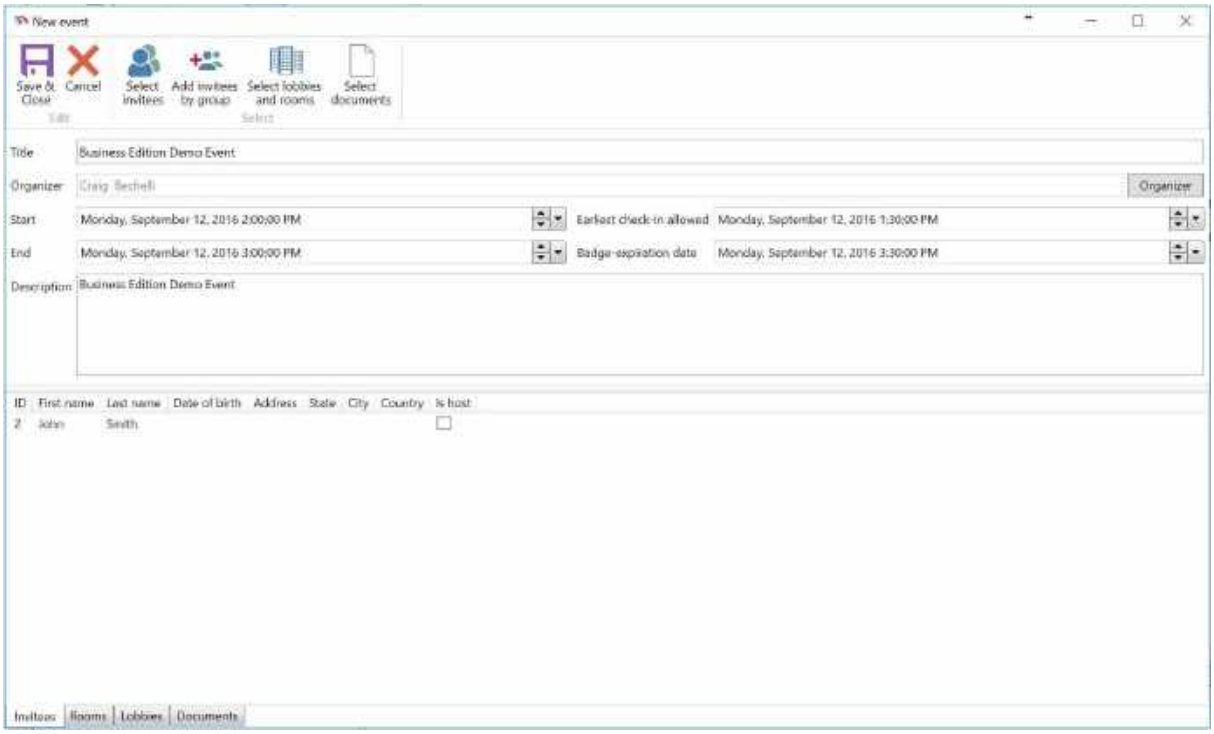
6.2.1 New event



Clicking on new event will open the New event window.



Here you can enter all the details for the event, set start and end dates and select invitees/groups.

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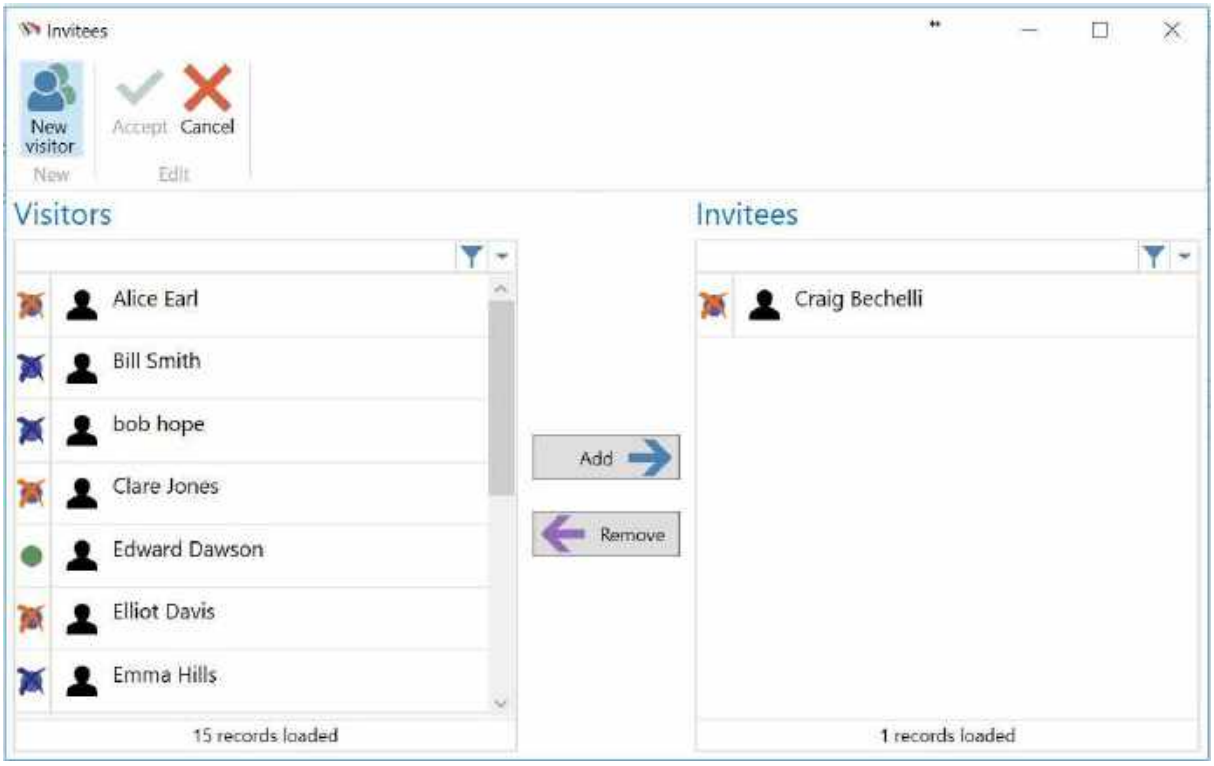
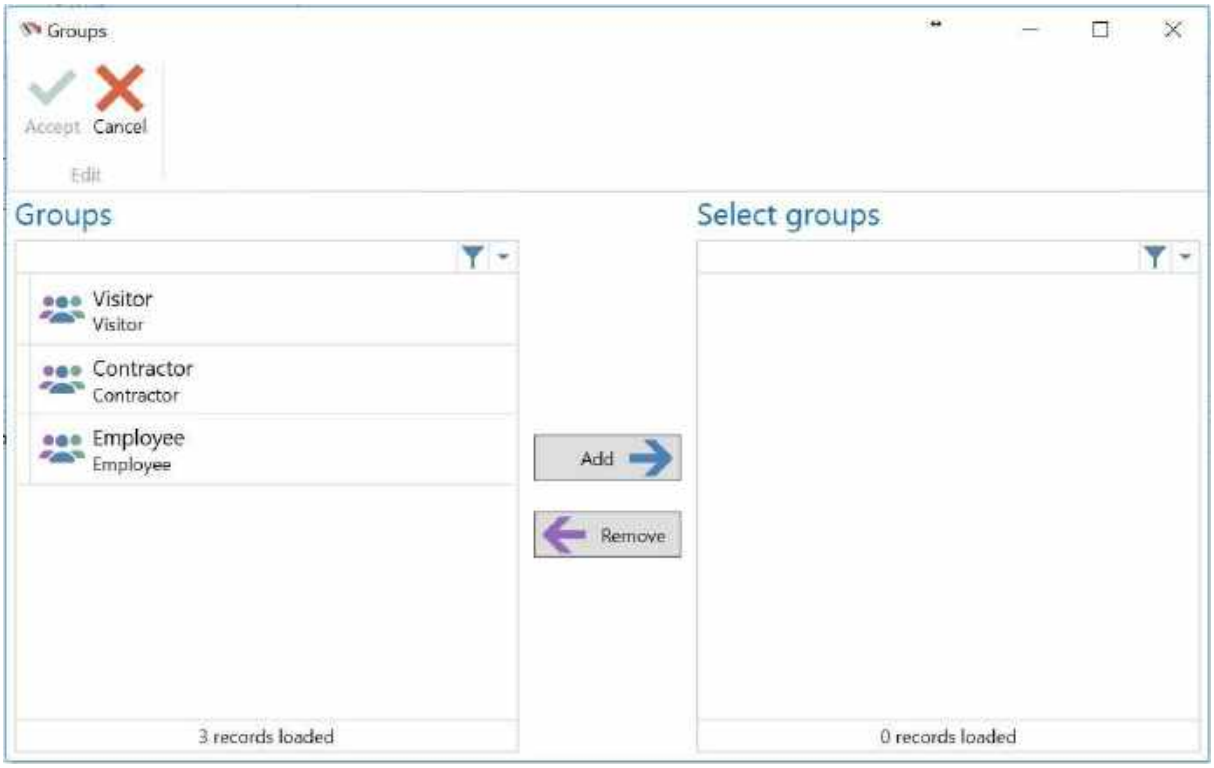


Clicking on Select invitees allows you to select visitors from the list and add them to the event. You can also add new visitors directly by clicking on new visitor.



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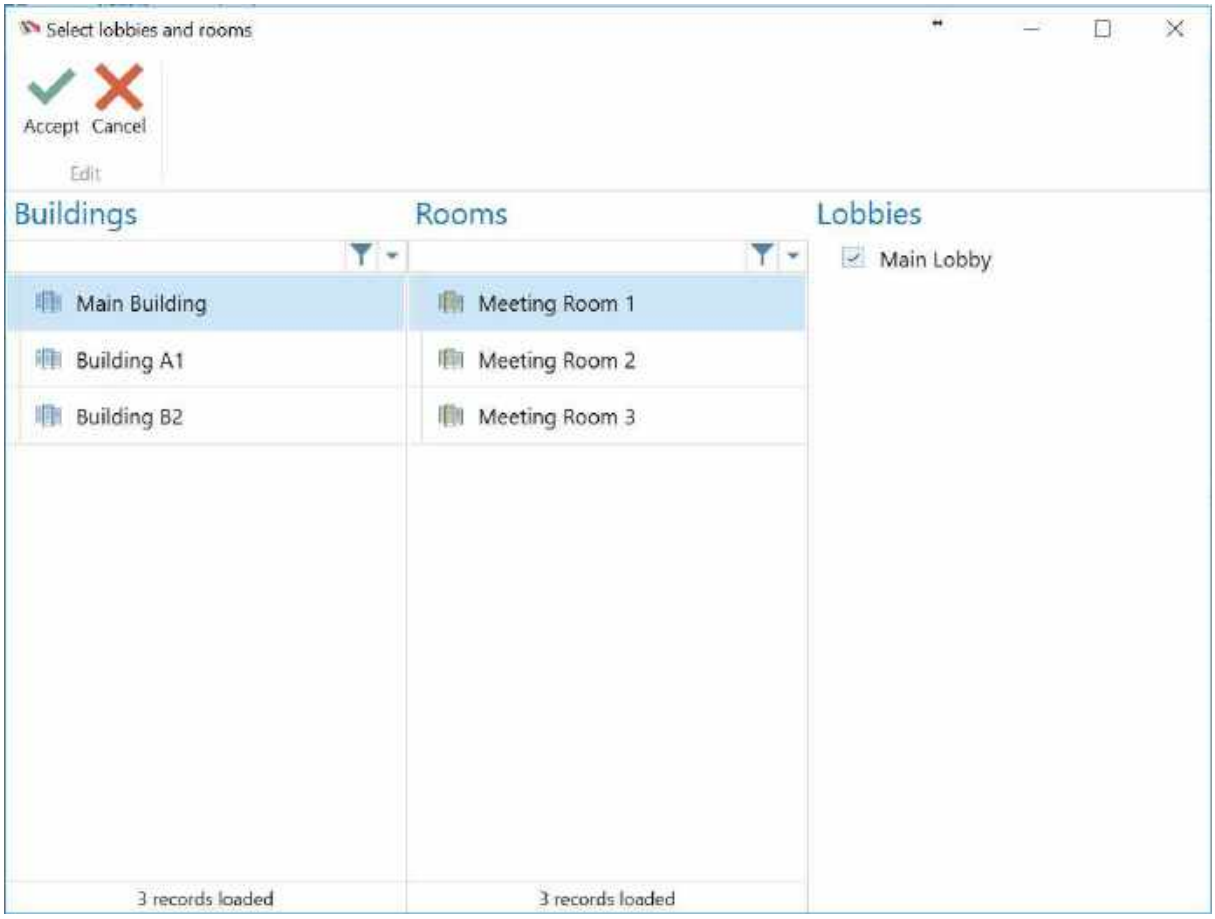
And clicking on Add invitees by group allows you to select groups to add to the event.



When clicking on Select Lobbies and Rooms you can select the building/room where the event will take place and the lobby where the visitors can check-in.

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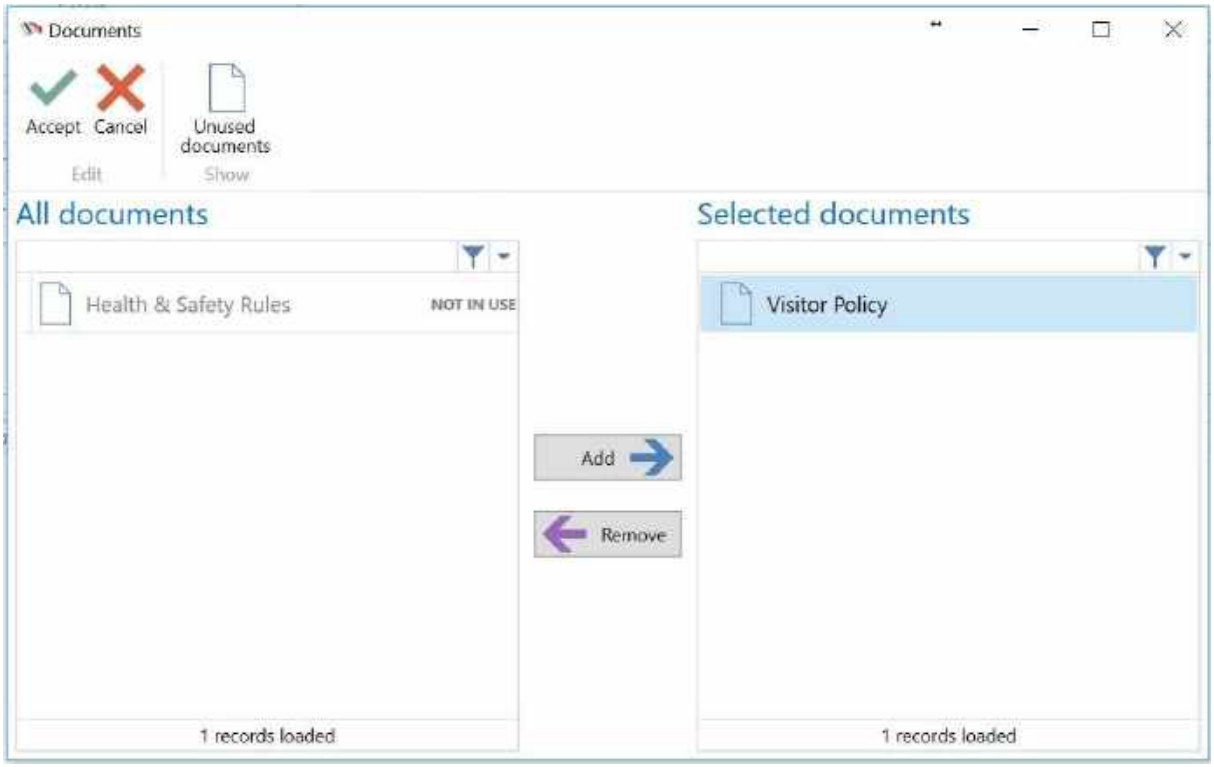
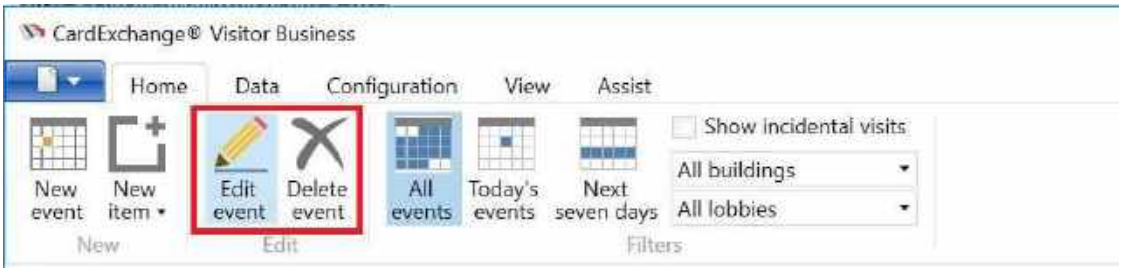


Clicking on Select Documents will allow you to choose documents that are required to be signed for the specified event. More information on this can be found here[274].

6.2.2 Edit



To edit an event you first need to select the desired event from the list, then simply click on edit event.

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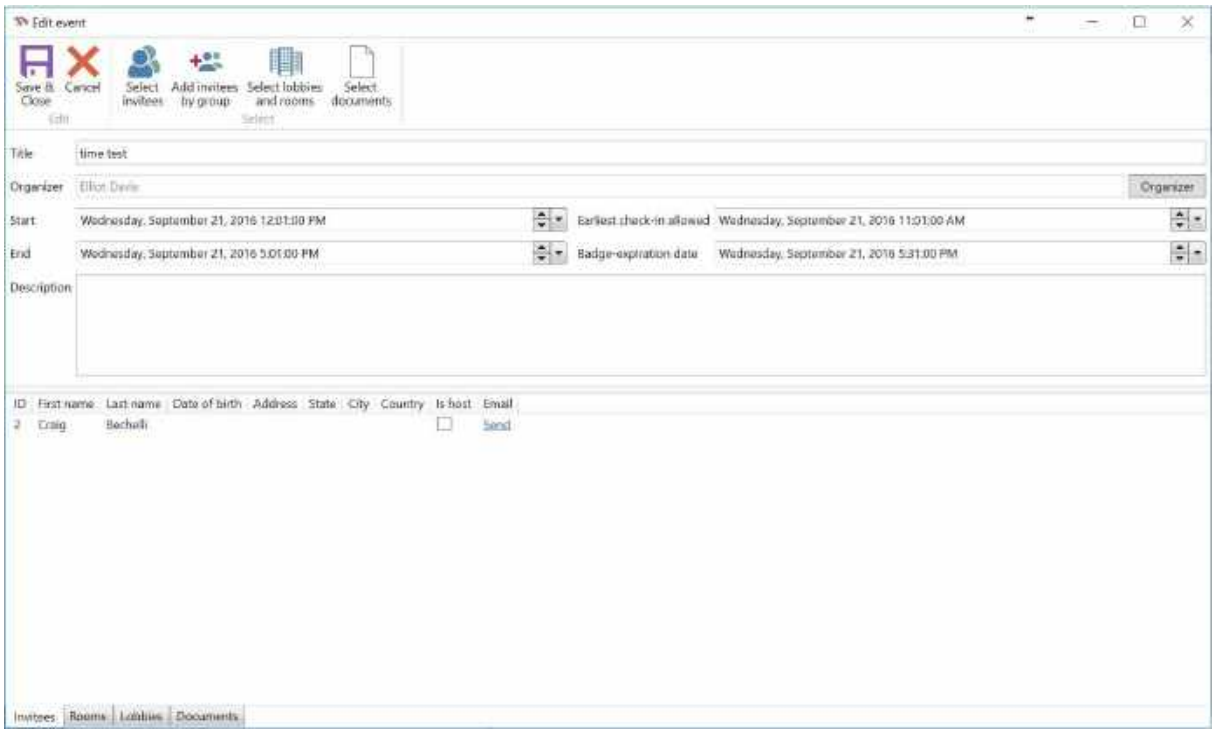

On the edit event screen you will see all the options that were available when creating a new event and you can amend/update any of the details.

After saving any changes to an event you will have the choice to resend the invitation emails to all invitees (In the case the date/time has changed), to just send an email to any added invitees or to not send any email notifications.
Next to each invitee, you also have the option to manually resend the meeting invitation which can be done at any time.

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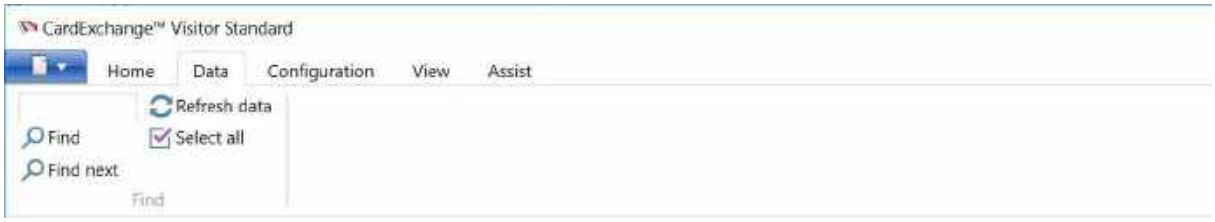
6.2.3 Filters

The filters section allows you to filter the list of events that is shown in the events pane. The following filters are available and can be used in combination with each other:

All events	This is the default option and shows all events in the database
Today's events	Shows all events for the current day
Next seven days	Shows all events for the next seven days
Show incidental visits	Include incidental events in the events list
All Buildings	This is default and will show visitors for all buildings, you can also select to only show visitors that can check in at specific buildings
All Lobbies	This is default and will show visitors for all lobbies, you can also select to only show visitors that can check in at specific lobbies

6.3 Data



CardExchange® Visitor offers many ways to view and Manage events etc.

In this section of the Help file we will go over all the functionality available like searching for and editing events, etc.

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6.3.1 Using Find

In the **Find** section of the Data tab you can find the functionality **Find**. If you select this option, you enter a dialog window in which you can enter a combination of letters or digits to search on (only alphanumeric characters).

If you then click OK, the first element from the list of names that contains the requested combination is selected.

If the first match is not the one you are looking for, you can **search** on the same combination by clicking the **Find next** button in the **Find** section of the Data tab. You can repeat this until you have found the correct person.

The advantage of searching in this way is that the text you enter does not need to be at the start of an element in the events pane. The search does not make a distinction between uppercase and lowercase characters.

With this **Find** function, all elements in the Events pane 247 remain visible. Any restrictions to the number of records that are displayed, which would normally apply as a result of what you have entered in the text field, are overruled.

6.3.2 Using Keyboard

The **find** functions that have been discussed in the section Using Find 258 are also available from the keyboard. You can display the window Find by simultaneously pressing the **control key** and the letter **f**. You can repeat the search as often as is required to find the correct person by pressing the **F3** function key.

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6.3.3 Refresh Data

It is possible that you cannot find the intended record because it has only just been entered into the database. The details of the record in question have already been entered into the database, but CardExchange® Visitor has not yet, as it were, seen it. You can solve this problem by selecting the **Refresh data** option in the Find section (or by pressing the **F5** function key). CardExchange® Visitor will retrieve the list of records from the database again.

Doing this ensures that the most recent data for the record concerned is displayed.

6.4 Configuration

Under the configuration tab you can set some advanced options, create/edit buildings, lobbies and rooms, add documents to be used during checking, change settings for the database columns and setup authorizations.

6.4.1 Advanced Options

Clicking on Advanced Options will show a window where you can changes some advanced settings of CardExchange® Visitor.

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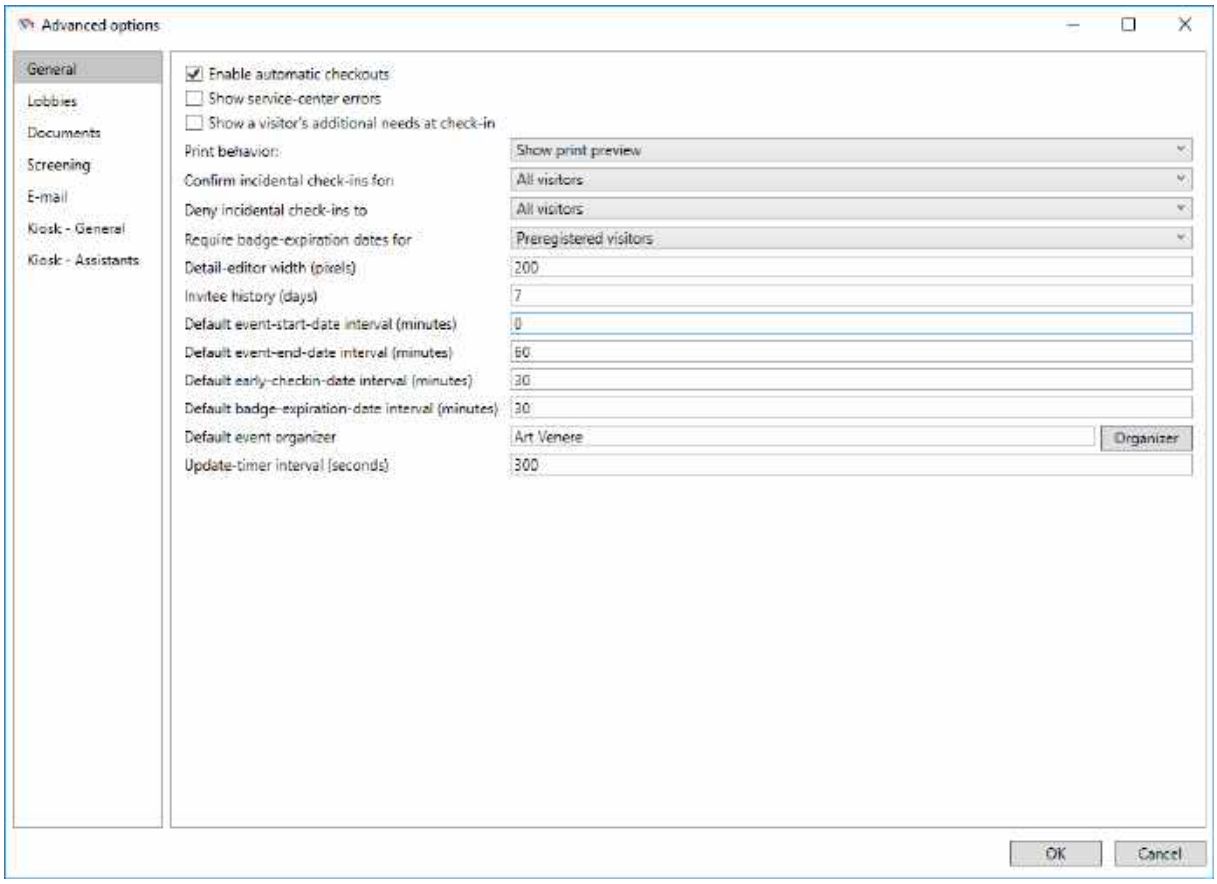

In the Advanced Options window you can set the requirements for each separate discipline of the application, just simply select the tab and change the settings.
Click Here 194 to view the Advanced Options section of this help file where you can find an explanation of what the settings are for and how to configure them.

6.4.2 Layout

Under the Layout section of the ribbon it is possible to edit the column attributes 233 such labels, font sizes, text masks etc. as well as select the look-up columns and detail columns that are displayed.
You can also configure drop-down values 231 to be used for columns where data entry is always from a selection of values.

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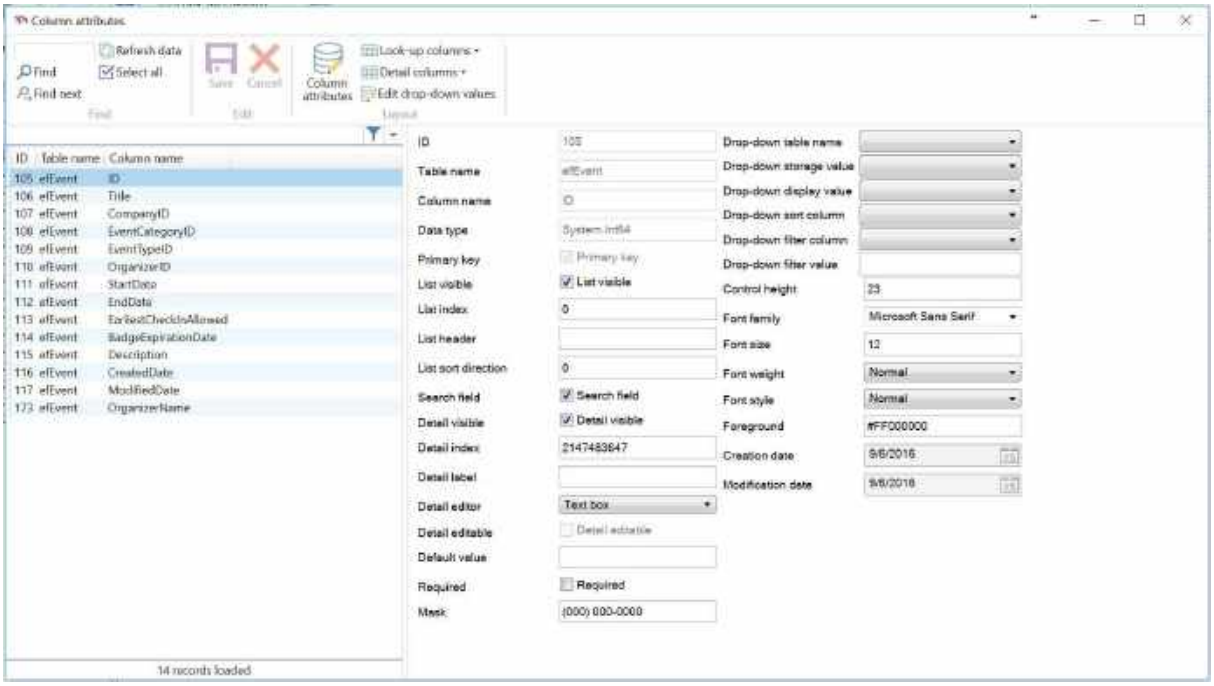
6.4.2.1 Column Attributes



For most tables available within the CardExchange® Visitor database it is possible to customize the column attributes.
Below are the options for the efEvent table used to store all of the event details, however the same principal is valid for all of the other available tables as well.

List Options

List visible	Specify whether the column is visible in the events list of the events pane
List index	Specify the sort index of the list item
List header	Customize the column header that is shown in the events list
List sort direction	Specify a sort direction if required
Search field	Specify whether to include the column in search from the events list search box

Detail Options

Detail visible	Specify whether the column is visible in the events details pane
Detail index	Specify the sort index of the events details item
Detail label	Customize the column header that is shown in the event details pane

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Detail editor	Specify the type for the column, for example a text box or date/time picker
Detail editable	Spedify whether the column in the events details pane should be editable
Default value	Specify a default value for a column when adding a new event
Required	Specify whether a column should be a required field when adding a new event
Mask	Setup an input mast for a text box, for example a phone number format

Font Options

Control height	Specify the height of the text box
Font family	Specify the font to display for each column
Font size	Specify the font size to display for each column
Font weight	Set the font weight
Font style	Set the font style
Foreground	Specify the text color

Drop-down Options

Drop-down table name	Specify the table to use for looking up the drop-down values
Drop-down storage value	Specify the column to use when storing back the drop-down value
Drop-down display value	Specify the column to use for displaying the drop-down value
Drop-down sort column	Specify the column to sort the drop-down items by
Drop-down filter column	Specify the column to use as the filter for drop-down items
Drop-down filter value	Set the filter value to use to when looking up drop-down items

6.4.3 Authorizations

The Authorizations section is the same as mentioned in the Authorizations 234 section of the Working With Visitors.

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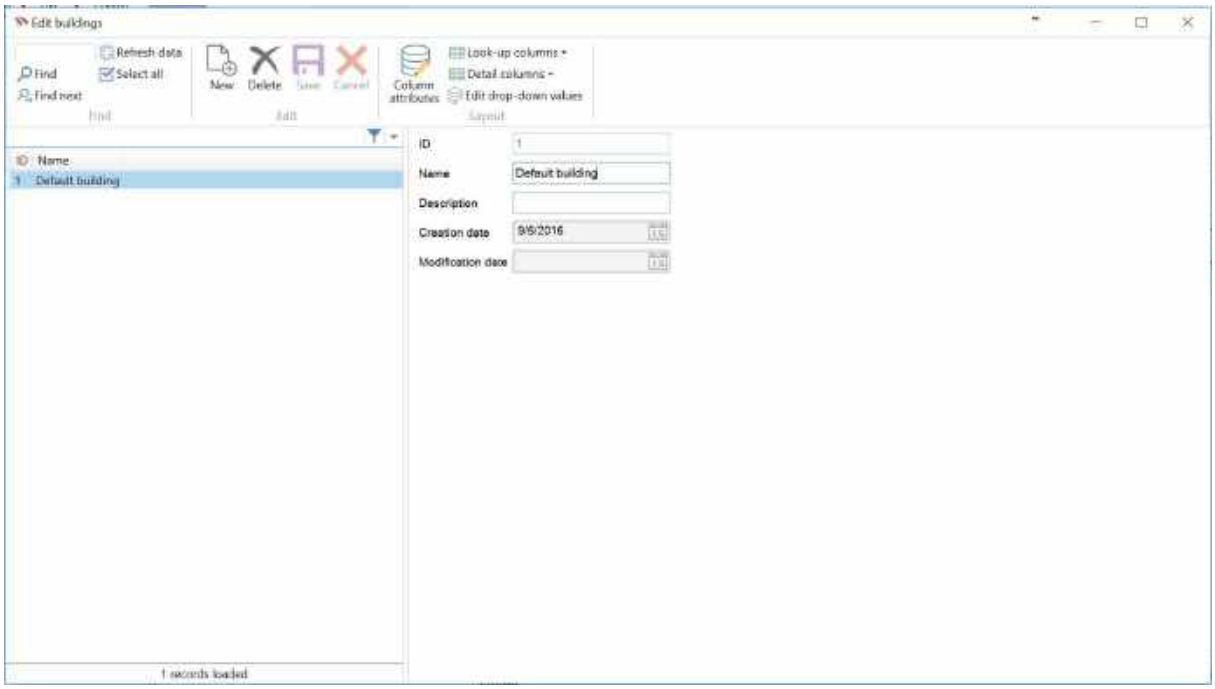
6.4.4 Buildings

CardExchange® Visitor Business Editions support the creation of unlimited buildings for your facility.



When clicking on Edit buildings you can change the name of the default building, as well you can add additional buildings if required.
You can provide a name for the building as well as a description.

6.4.5 Lobbies

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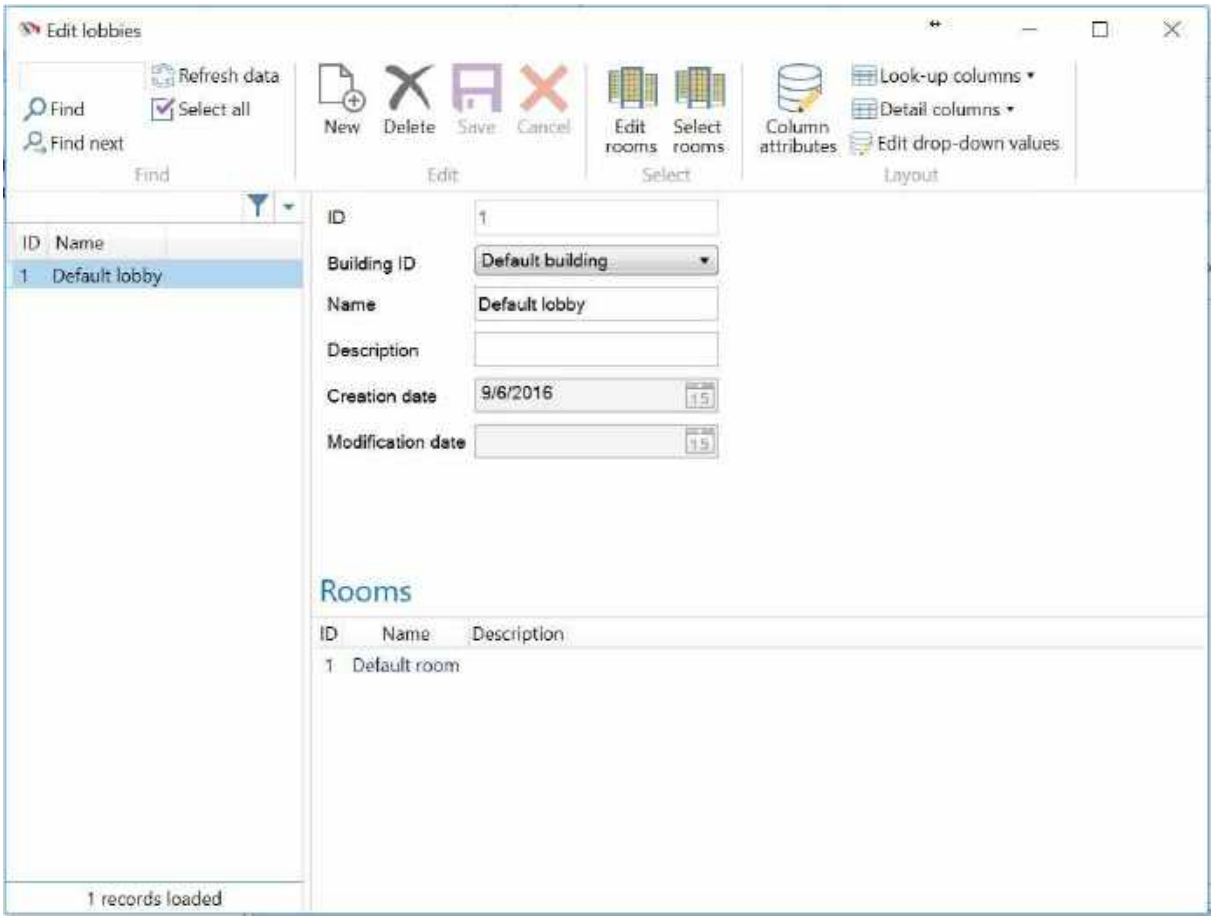
CardExchange® Visitor Business Editions support the creation of unlimited lobbies for your facility.



When clicking on Edit lobbies you can change the name of the default lobby, as well you can add additional lobbies if required.
You can also select the Building ID where the lobby is.

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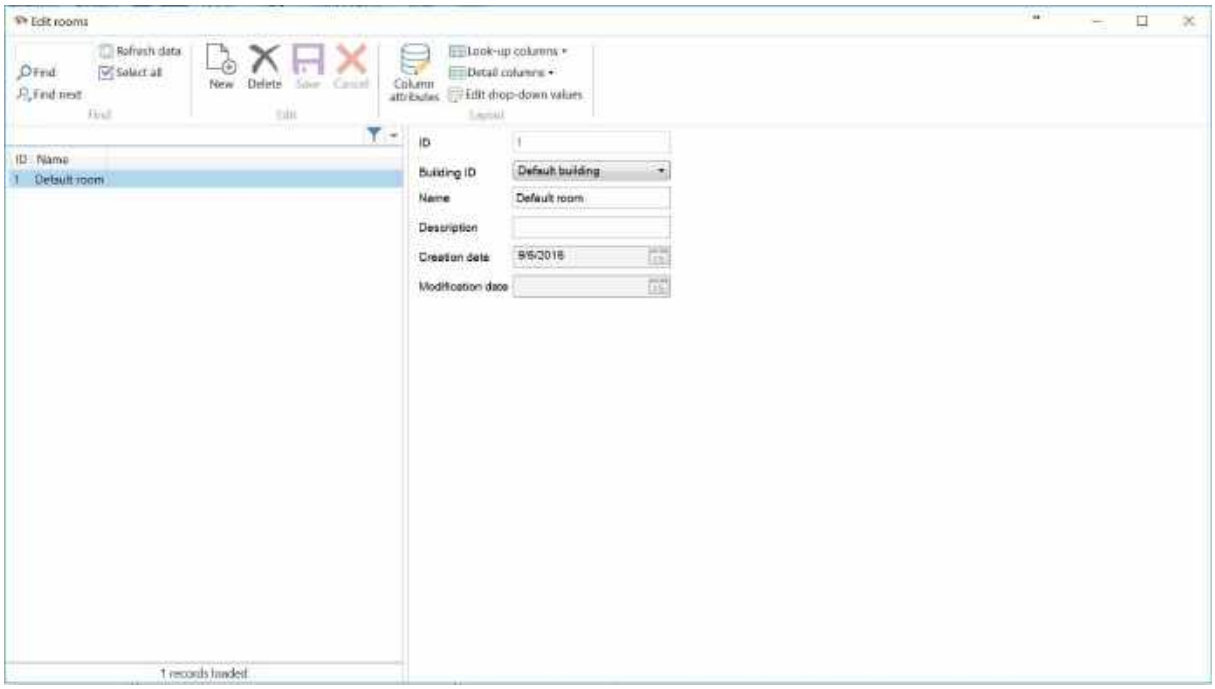
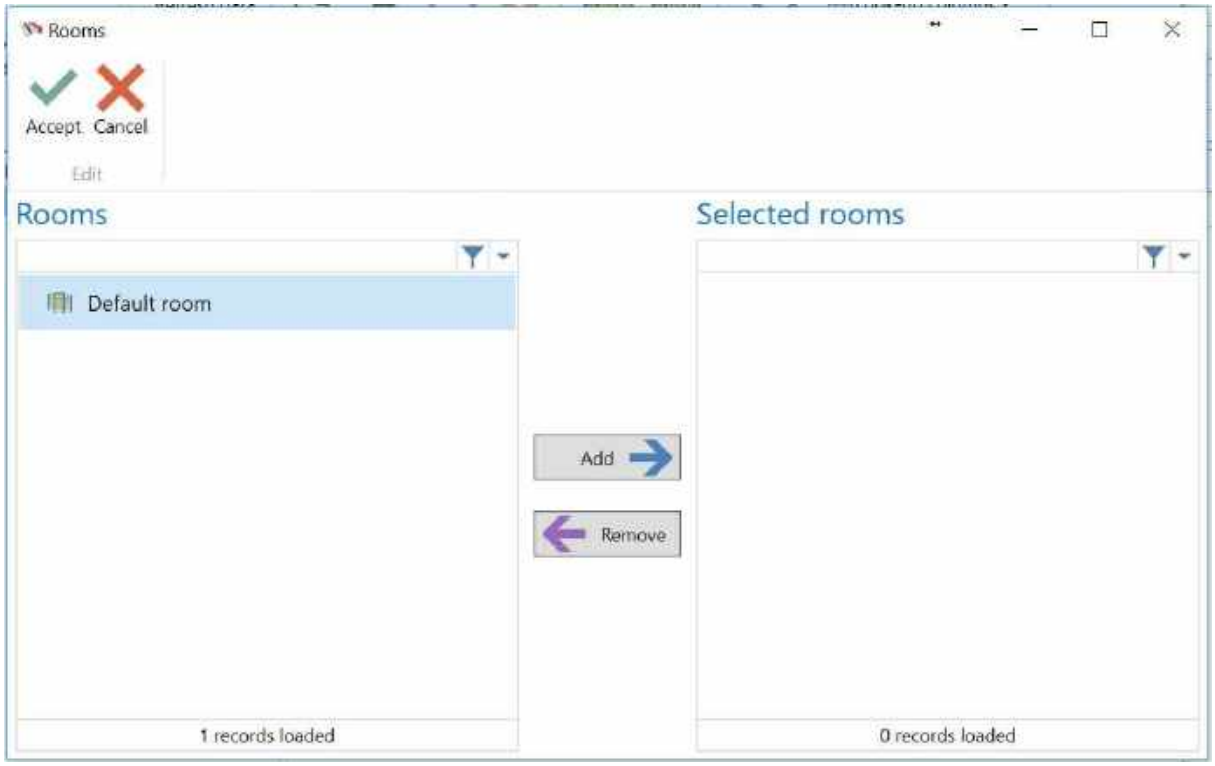


By clicking on Edit rooms you can also edit the rooms that can be accessed through the selected lobby.



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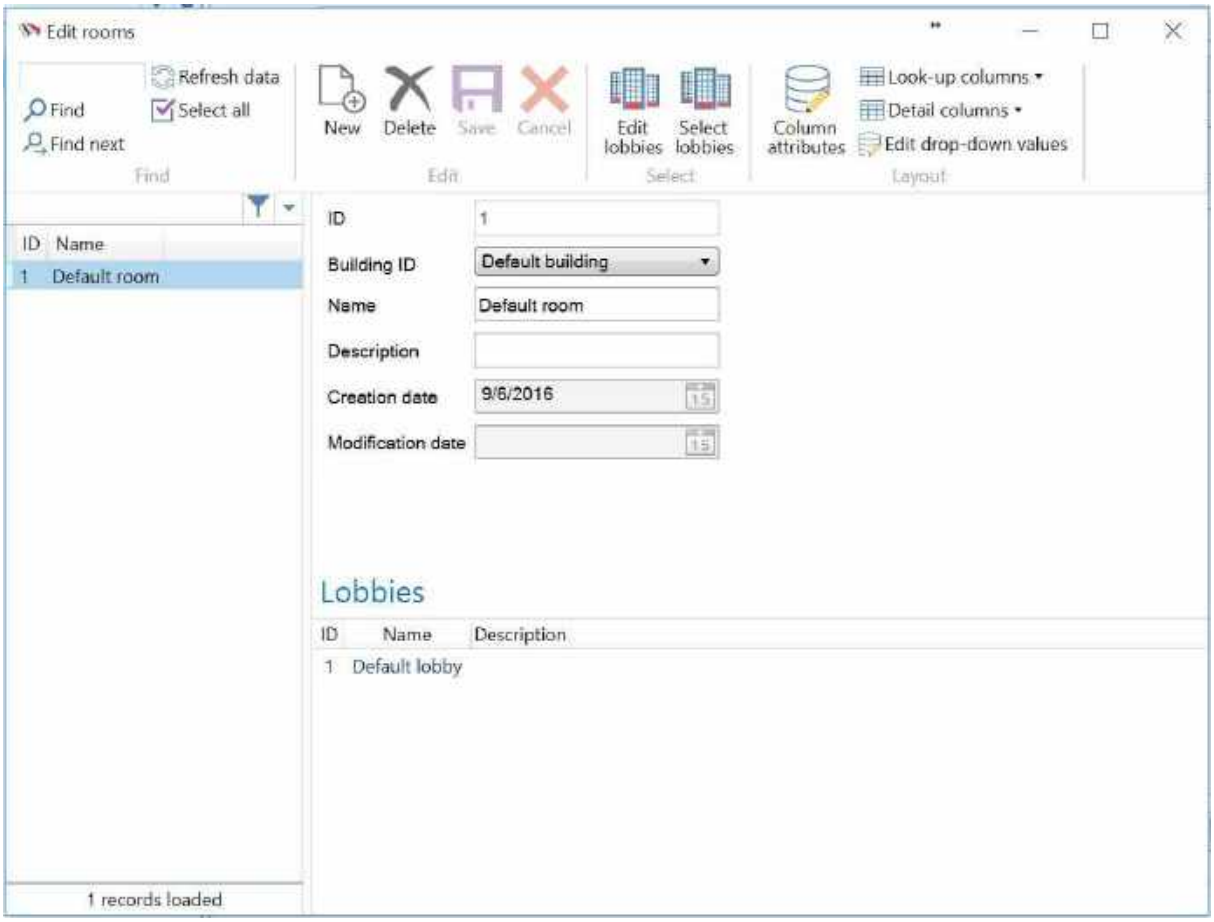
And you can also select those rooms to be available for selection when creating a new event.

6.4.6 Rooms

CardExchange® Visitor Business Editions support the creation of unlimited rooms for your facility.



When clicking on Edit rooms you can change the name of the default room, as well you can add additional rooms if required.
You can also select the Building ID where the room is.

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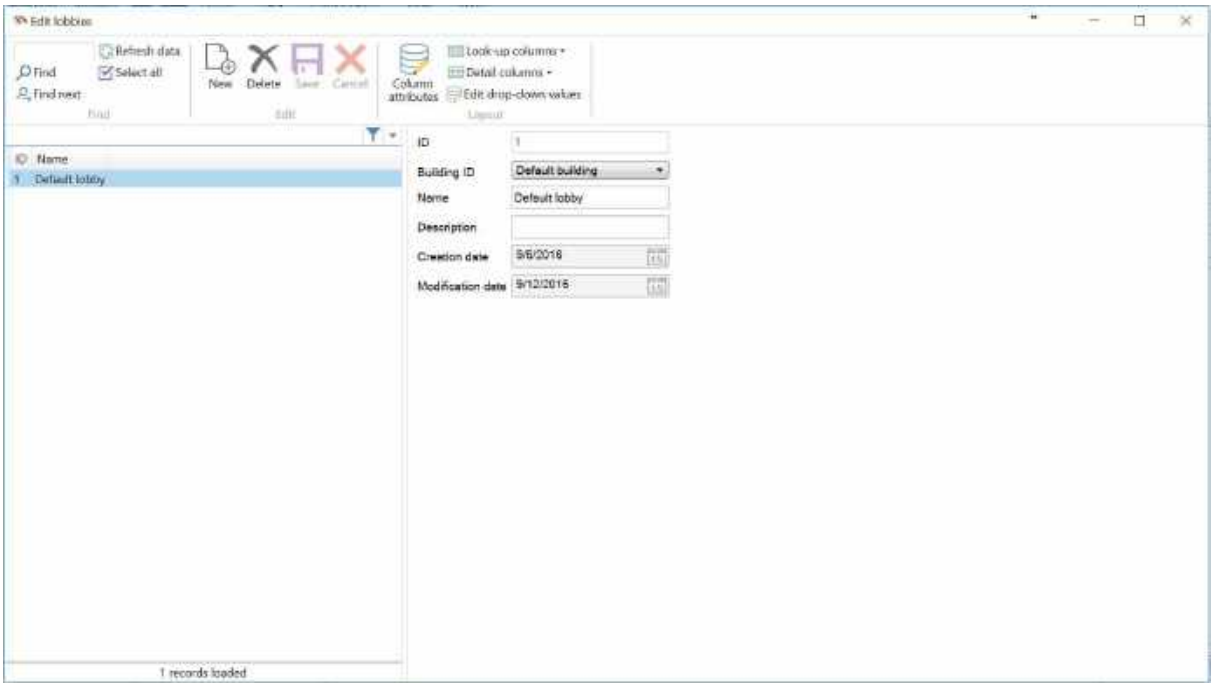
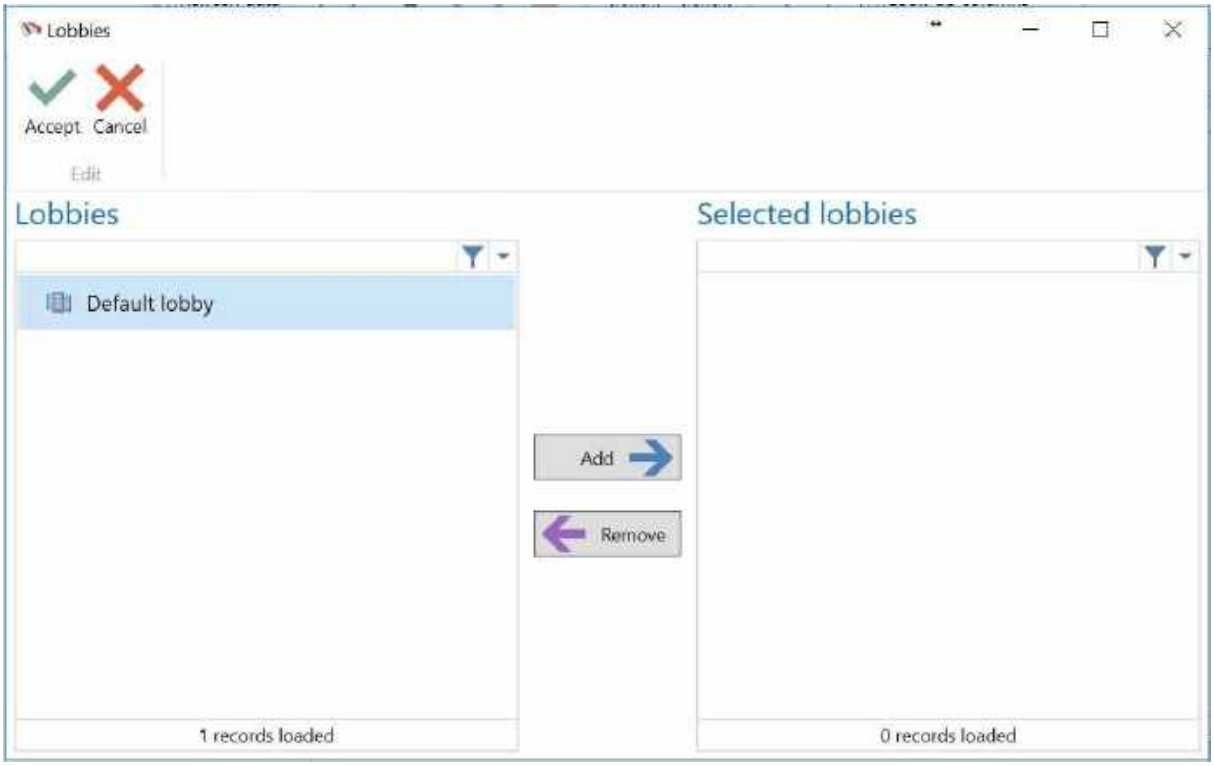


By clicking on Edit lobbies you can also edit the lobbies that allow access to the selected room.



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And you can also select those lobbies to be available for selection when creating a new event.

6.4.7 Documents

With CardExchange® Visitor Business edition you can ensure that your company has every visitor sign required documents, such as a non-disclosure, prior to entering the premises.

6.4.7.1 Designing a Document

CardExchange® Visitor utilizes the powerful Merge fields feature within Microsoft Word to allow for easy merging of data into documents. The user is able to define custom mappings between merge fields and person details.

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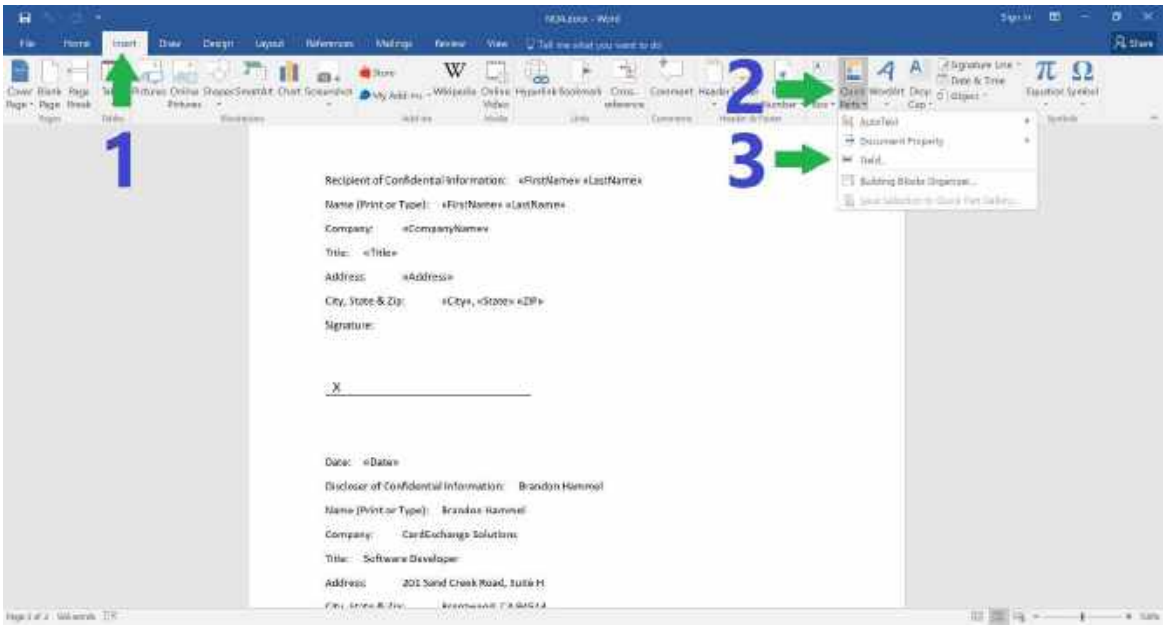

6.4.7.1.1 Adding Merge Fields

Merge fields are a powerful feature within Microsoft Word that allow for easy merging of data into documents. CardExchange® Visitor utilizes this feature by allowing the user to define custom mappings between merge fields and person details.
Use the following procedure to insert merge fields into a Word document:

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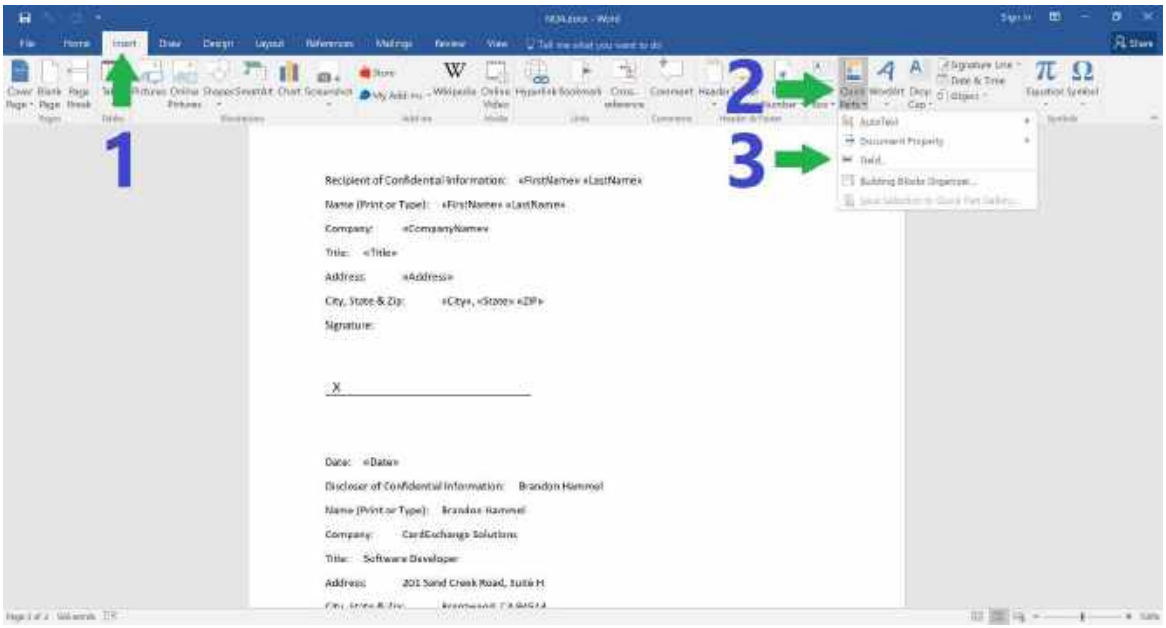

Inside Word, place the cursor in the position where the merge field is to be added. Head to the Insert tab -> Quick Parts -> Field…

The Field dialog window is now shown. Choose “Mail Merge” from the “Categories” combo box.

Choose “MergeField” from the “Field names” list box.

Enter the desired merge field name in the “Field name” text box and click “OK”. The merge field is now displayed in the document as «FieldName» (see “Merge field mapping example” for a detailed example).

Repeat steps 1 – 4 to insert more merge fields.

Note: Refer to “Importing and configuring documents” for steps on defining the mappings between merge fields and person details.

6.4.7.1.2 Adding Signature Lines

Every document used within CardExchange® Visitor must include a signature line so that the person’s digital signature can be inserted into the document. Digital signatures provide proof that the document was signed, by whom it was signed, the signing date and time, and whether the document has been modified since its time of signing. Use the following procedure to insert a signature line into a Word document:

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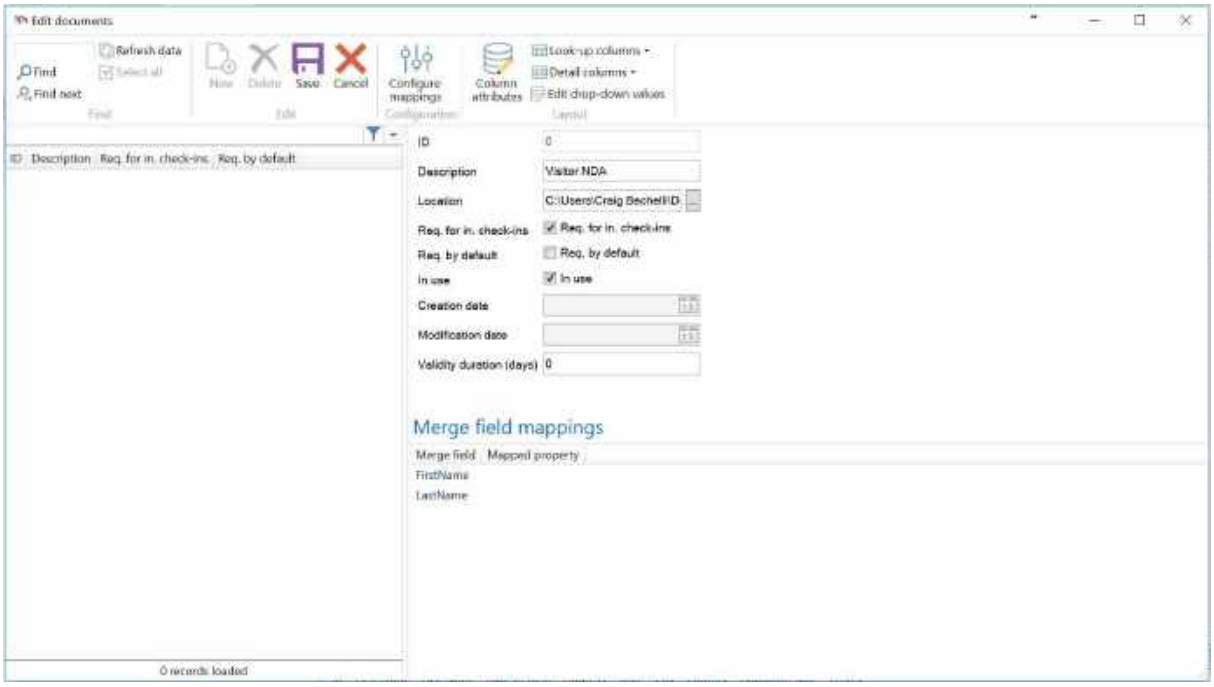
X

Inside Word, place the cursor in the position where the signature line is to be added. Head to the Insert tab -> Signature Line. The signature line is now added. The above is what the signature line looks like.

6.4.7.2 Importing and Configuring Documents

Before documents can be linked to events, they must be imported into the application. To import a document into CardExchange Visitor, head to the Events view -> Configuration tab -> Edit documents.



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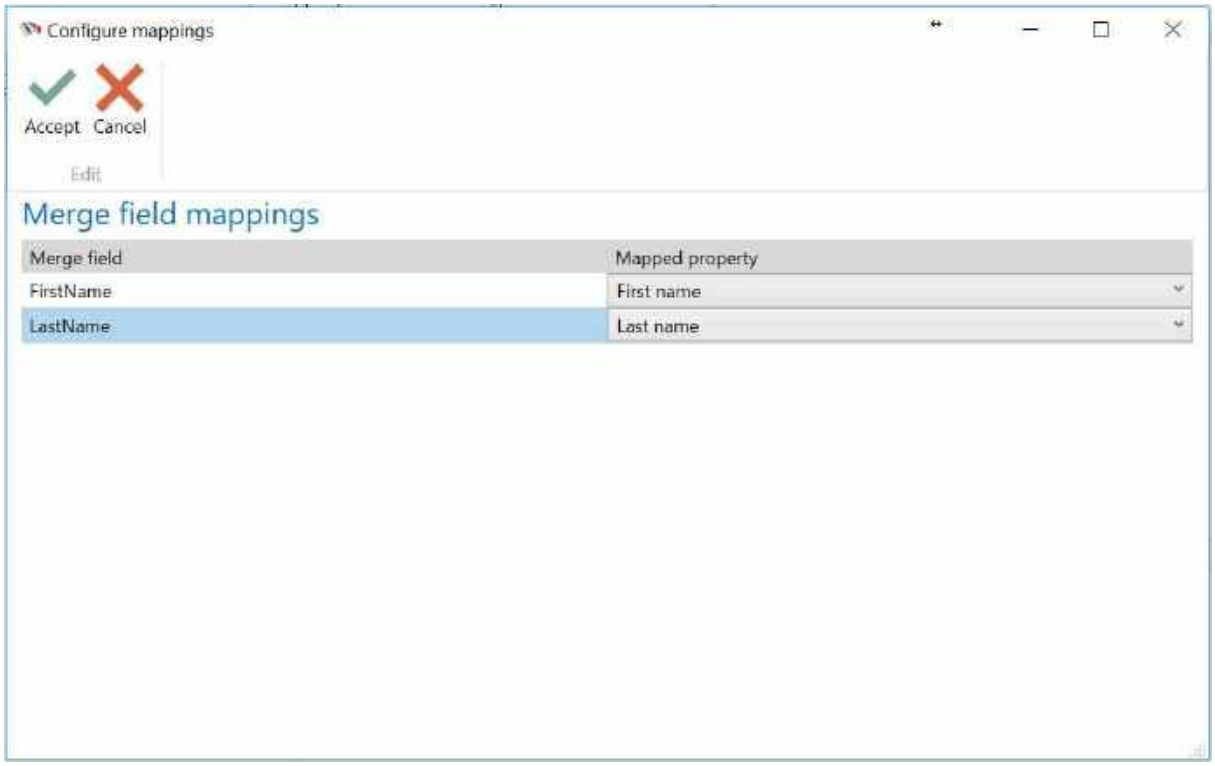
The “Edit documents” window is brought up. This window is used to import new documents into the application and edit existing documents:

1. To begin importing a new document, click the “New” ribbon button.
2. The Location text box is highlighted red—this is because a document location must be specified.
    a. Location is a required field—a new document cannot be added without specifying its location on the computer.
    b. Consequently, the “Save” ribbon button is grayed out, signifying that the document cannot be saved without first choosing a file location.
3. The small button to the right of the Location text box brings up the Open file dialog. Locate the desired document on the computer and click “Open." The Location text box now displays the path to the chosen file.
4. If the document selected in the previous step contains merge fields, the “Merge field mappings” area is now populated with the merge field names.



5. Click the “Configure mappings” ribbon button to bring up the configure mappings dialog.

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a. For each of the merge fields in the left column, choose the desired mapped person property by selecting it from the corresponding combo box.

b. Click "Accept" to save the current mappings or "Cancel" to discard them. The "Merge field mappings" area in the "Edit documents" window is now updated to reflect the changes.

   i. Now when a document is shown during the check-in process, the visitor's information for each of the chosen properties will be shown in place of the corresponding merge field in the document.

6. Now it is time to configure the rest of the document details:

   a. Description—this is a short name for the document that will be shown throughout the application (such as when adding documents to events). Enter something here that will allow the document to be easily identified.

   b. Required for incidental check-ins—when checked, all visitors checking in without a planned visit will be required to sign this document.

   c. Required by default—when checked, this document will automatically be added to all newly-created events, and cannot be removed from events.

   d. In use—this box must be checked in order for this document to be accessible throughout the rest of the application. When left unchecked, this document will not show up in the list of available documents during event creation.
   This is useful for easily hiding documents that may not be used anymore without having to delete them from the application.

7. Once all of the document details have been configured, click the "Save" ribbon button. The document is added to the list in the left column of the window.

8. If needed, repeat steps 1 – 7 to import more documents. When finished, close the "Edit documents" window by clicking the "X" in the top-right corner of the window.

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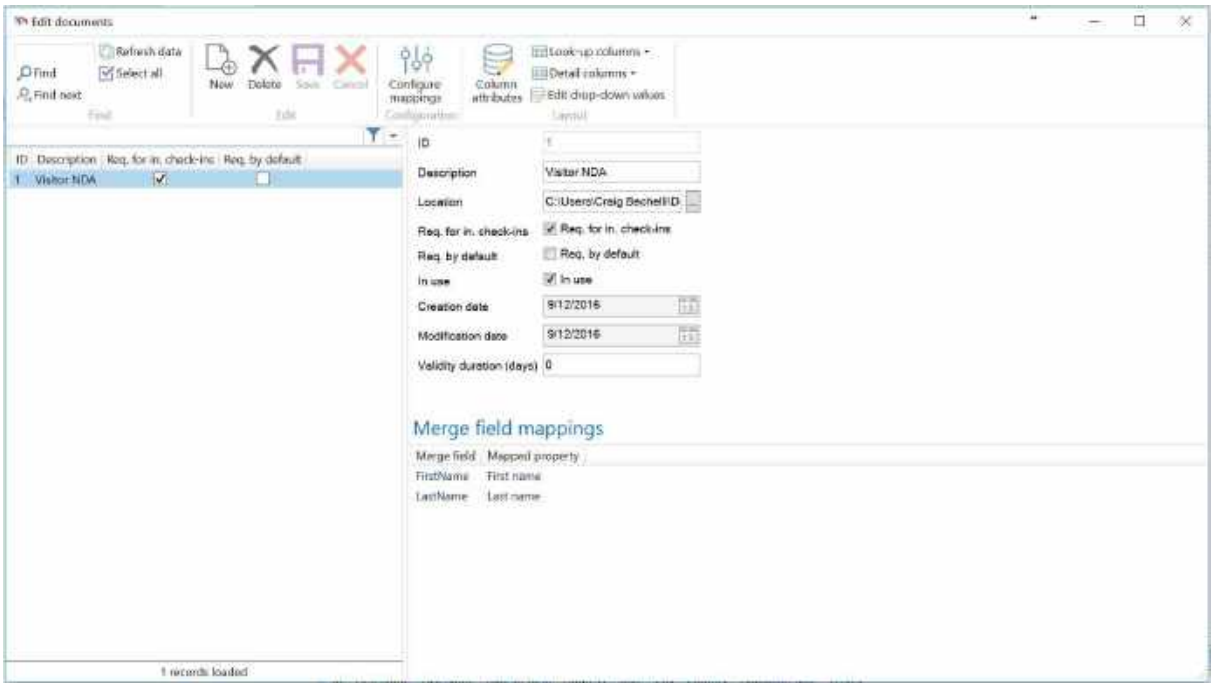
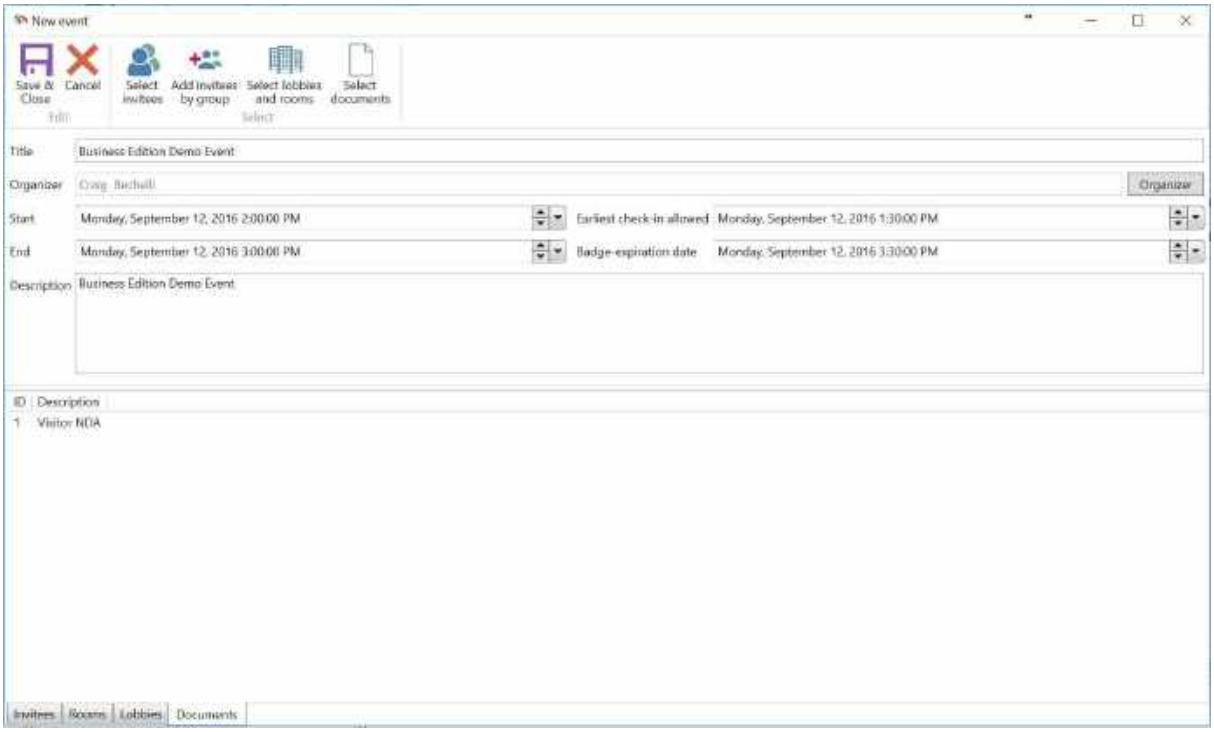


6.4.7.3 Adding Documents To Events



Open the “New event” window by heading to the Visitors view -> New item -> New event (alternatively, go to the Events view -> New event). This brings up the “New event” window.

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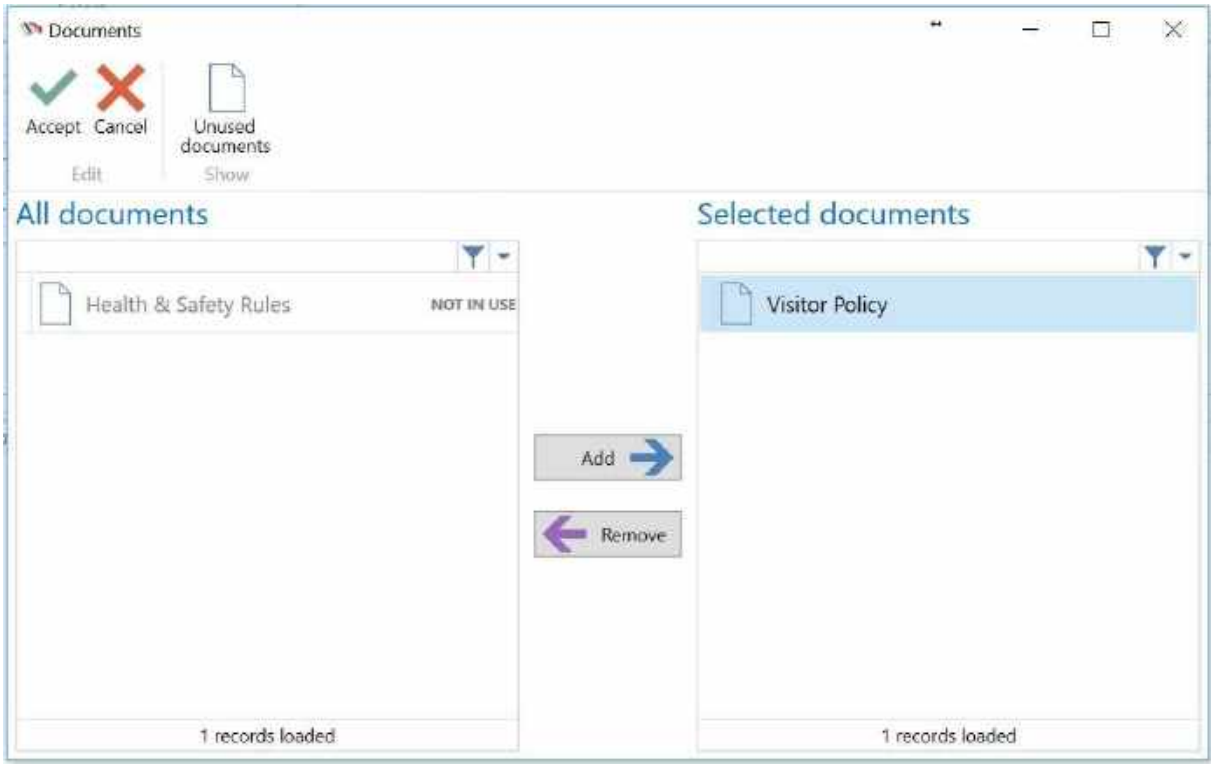
If any documents have been configured as "Required by default", they are automatically linked to the event and displayed in the Documents list.



1. To add documents to this event, click the "Select documents" ribbon button. This brings up the document selection dialog window.
    a. To link a document to this event, select the document in the "All documents" column and click the "Add" button. The document is now moved to the "Selected documents" column.
        i. Note: Documents not configured as "In use" will not show up in this window. If a desired document cannot be found, make sure its "In use" field is checked in the "Edit documents" window (refer to "Importing and configuring documents 271").
        ii. Note: Documents configured as "Required by default" will automatically be displayed in the "Selected documents" column. Additionally, they will be marked with the text "REQUIRED". These documents cannot be removed from the event. Attempting to remove a required document from the event will result in a popup warning, and the document will remain in the "Selected documents" column.

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b. Once the desired documents have been added to the "Selected documents" column, click "Accept" to save the current selection or "Cancel" to discard it. The Documents list in the "New event" window is now updated to reflect the changes.

2. Continue configuring the rest of the event details and click "Save & close" when finished.

6.4.7.4 Check-in Process

The check-in process requires visitors to sign any documents that may be required for the event that they are checking in for.

1. To begin the check-in process, select the visitor in the Visitors list of the Visitors view and click "Check-in" (located in the Actions group of the ribbon or the Actions pane). If any documents are required, the "Sign documents" wizard is shown.

   a. The top-right corner of this wizard displays the index of the current document as well as the total number of documents required for this event.

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b. The current document can be printed by selecting the "Print" button. This brings up two printing options:

i. Quick print—if a default printer has already been selected, the document is immediately sent to that printer. Otherwise, the print dialog is shown, and the selected printer becomes the default printer.

ii. Advanced print—this always shows the print dialog, which allows specifying which printer to send the document to, which pages to print, as well as the number of copies to print.

2. Click the "Sign" button to display the signature pad using the default signature device (to change the default signature device, head to the Visitors view -> Signatures tab -> Signature options and select the desired device). Once the signature is captured, a check mark replaces the "Sign" button.

3. If more documents require signing, click "Next" to continue.

a. You can go back at any point to review previous documents.

b. Clicking "Cancel" at any point will halt the check-in process, and the visitor will not be checked in.

4. Once all documents have been reviewed and signed, click "Finish" to complete the check-in process.

a. Each document is now saved in the configured Documents folder (default: C:\Users\Public\Documents*VisitorExchange*\Documents). The folder structure inside the Documents folder is *Company**Event**Invitee*. Navigate the appropriate company, event, and invitee folders to locate the documents.

b. Each document is saved as an encrypted PDF. When attempting to open one of these documents, a prompt is shown asking for a password to be entered. Two types of passwords can be entered: Document Open Password or Owner Password. Depending on which is entered, different permissions are granted:

i. Owner password: All permissions (modifying, copying, standard and high-resolution printing, content accessibility) [default: "owner"]

ii. Document Open Password: No permissions [default: "password"]

c. Clicking on the signature in the document displays the signature properties:

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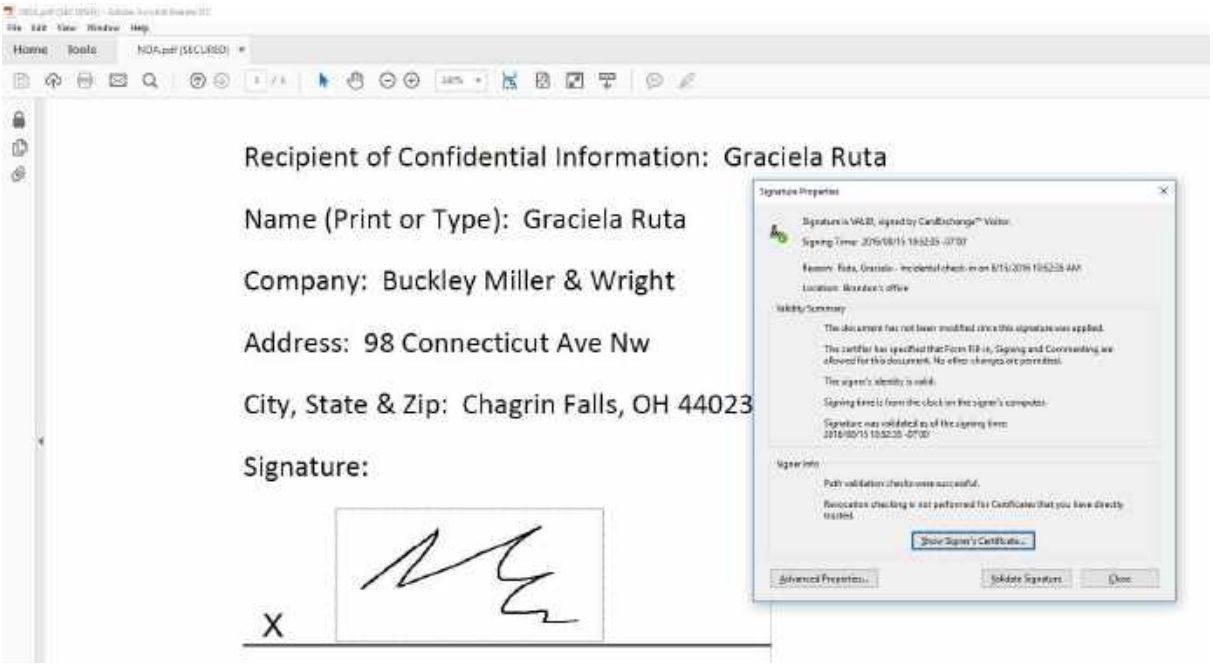

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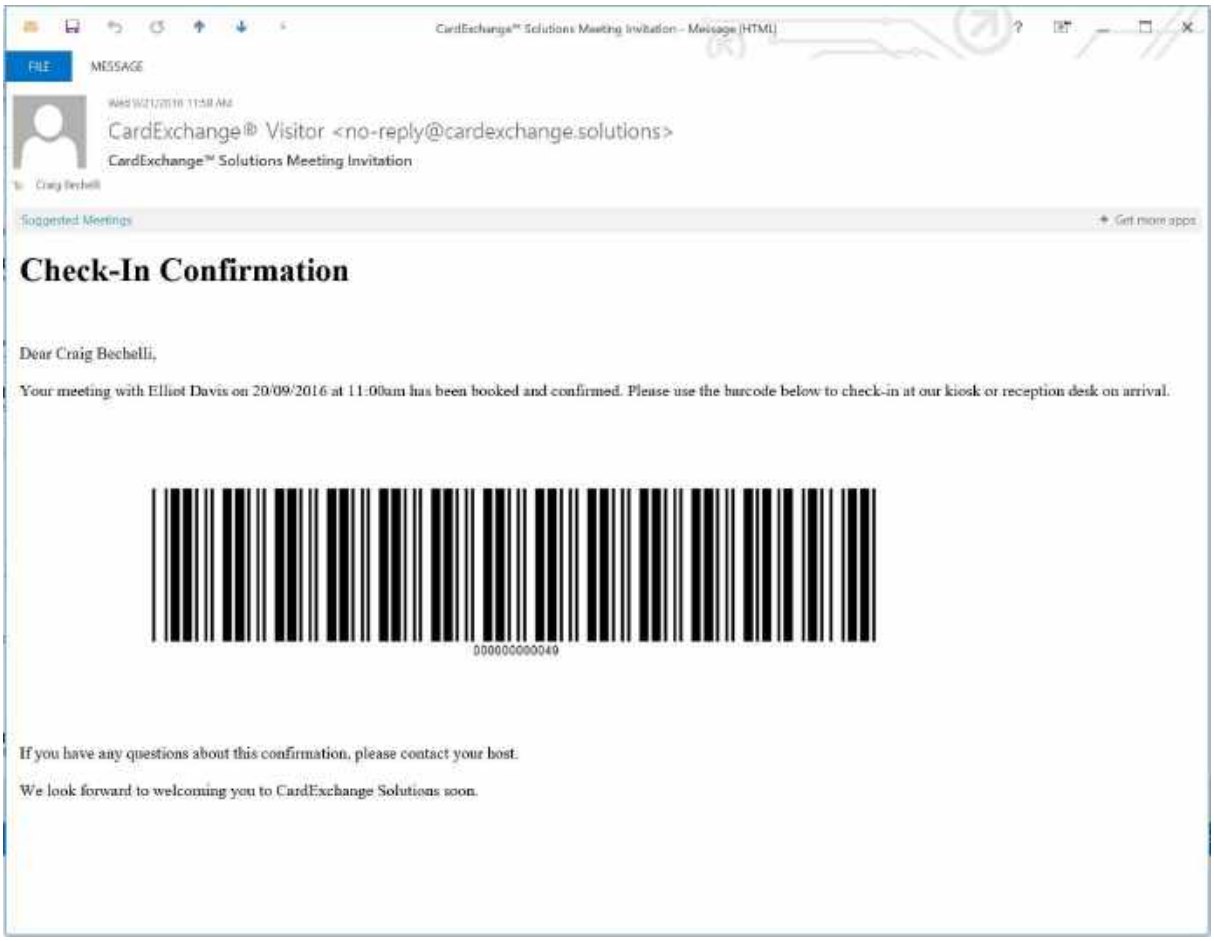
6.4.8 Email Notifications



CardExchange® Visitor Business Edition is offering email notifications to each Invitee of an event when the event is created, also an email notification is sent to the host of the event each time an invitee checks in to that event.

Above is an example of the email that is sent out to the invitee, depending on the barcode scanner being used at the lobby this can either be scanned from a print out or scanned from a phone or tablet device.
Scanning the barcode at the lobby will automatically select the relevant record on the screen so that you can take a photo, edit any details etc.. and check the person in.

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If you also have the CardExchange® Visitor Kiosk application then visitors can self check-in by scanning their barcode at the kiosk and following the on-screen instructions.

6.5 View

Under the view tab it is possible to set the language for CardExchange® Visitor, restore the view to the previous or default view and to hide the Event-details pane if it is not required.

6.6 Assist

With the release of CardExchange® Visitor we bring unique innovation to your desktop by offering everything that you need to produce cards in a fast and secure way at hand in **CardExchange® Visitor Assist**.

Help, Forum, Videos, etc., it is all available in this section of your CardExchange® Visitor product. When you enter the Assist view by selecting the corresponding tab, you will directly see an Outlook style interface showing on the left the available news items and on the right the content of this news item.

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CardExchange® Visitor uses this section to keep you informed about new updates and release plans so you will always be able to run the latest version. But also the reseller who has sold the product to you will keep you informed about his latest and greatest.

Take a look at the separate subjects in this 288 section of the Help file and see how this is going to benefit you!

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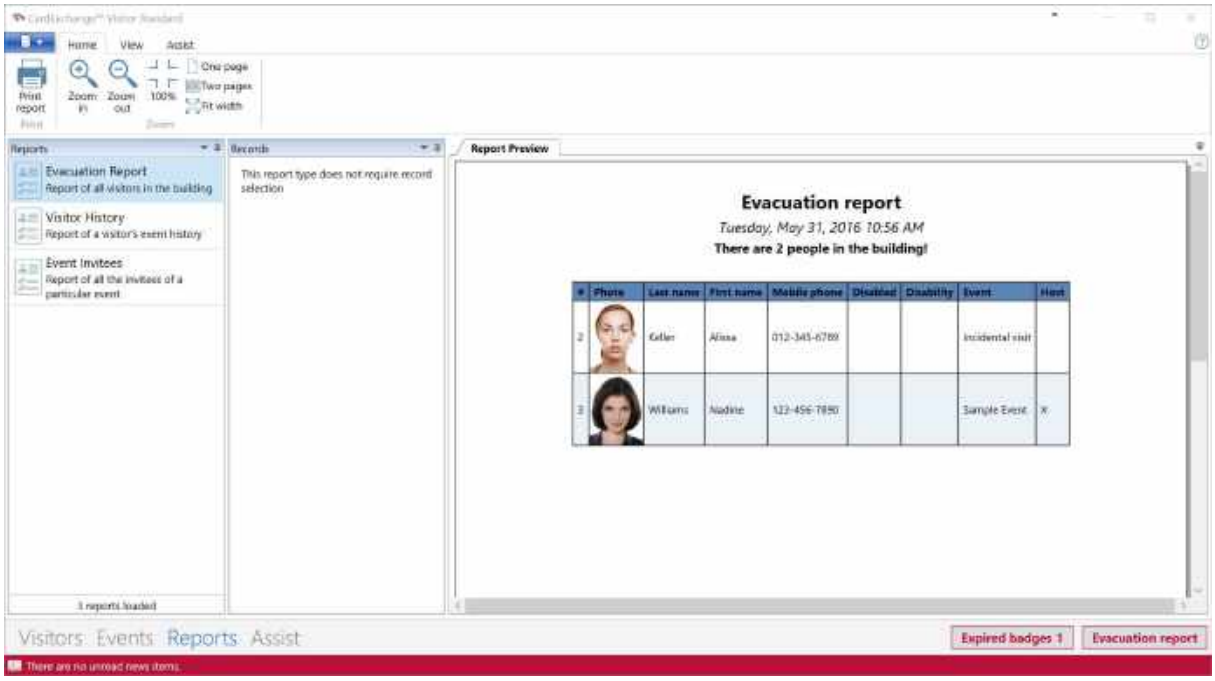
7 Working With Reports



In the reports view you can select one of the available reports to either preview on the screen or to print out.
You also have some settings to control the zoom/width/number of pages etc..

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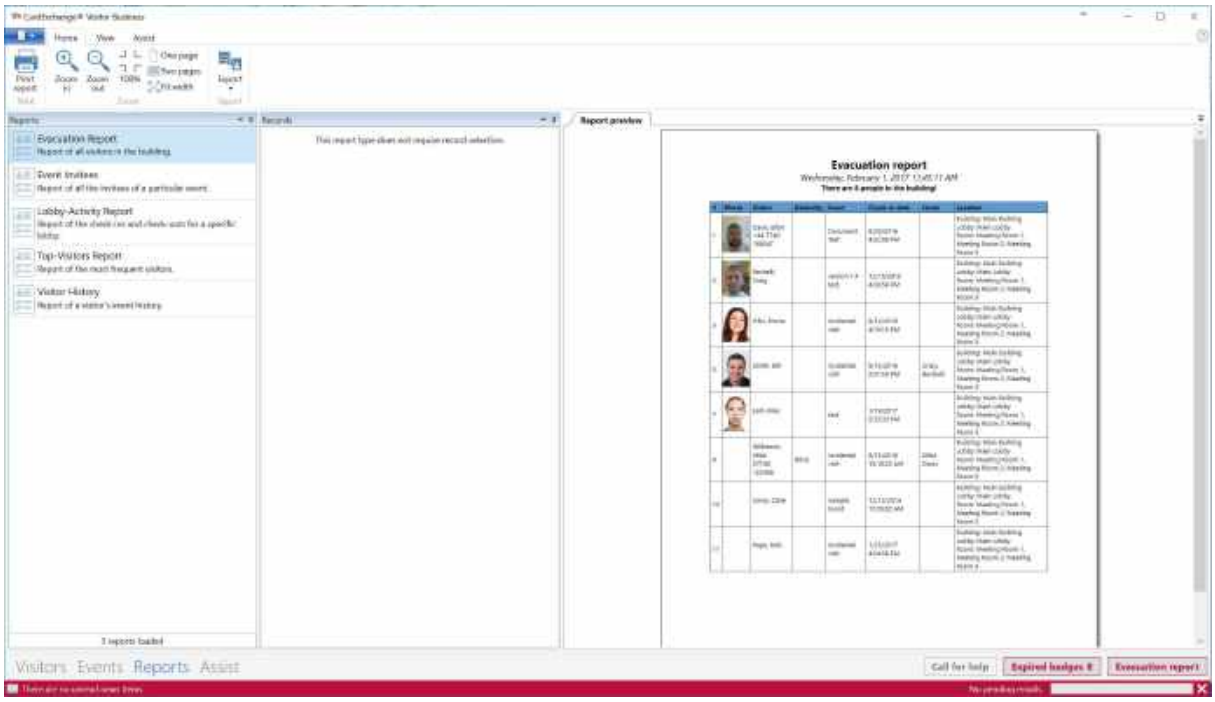
7.1 Evacuation Report



In the event of an emergency you can click select the Evacuation report to quickly preview and print out a report of all visitors currently checked-in.
The Evacuation report shows the key information for each person currently checked-in, this includes the following.

Visitor	Shows the visitors name
Mobile phone	Shows the persons mobile phone number
Location	Shows the building, lobby and room for the event
Disability	If the person is disabled then their disability will be shown
Photo	Shows the persons photo
Event	Shows the event that the person is attending, otherwise it will show Incidental visit
Host	Shows whether the person is the host of an event or not

The evacuation report can either be printed or exported to a .csv/.xlsx file using the corresponding buttons in the ribbon.

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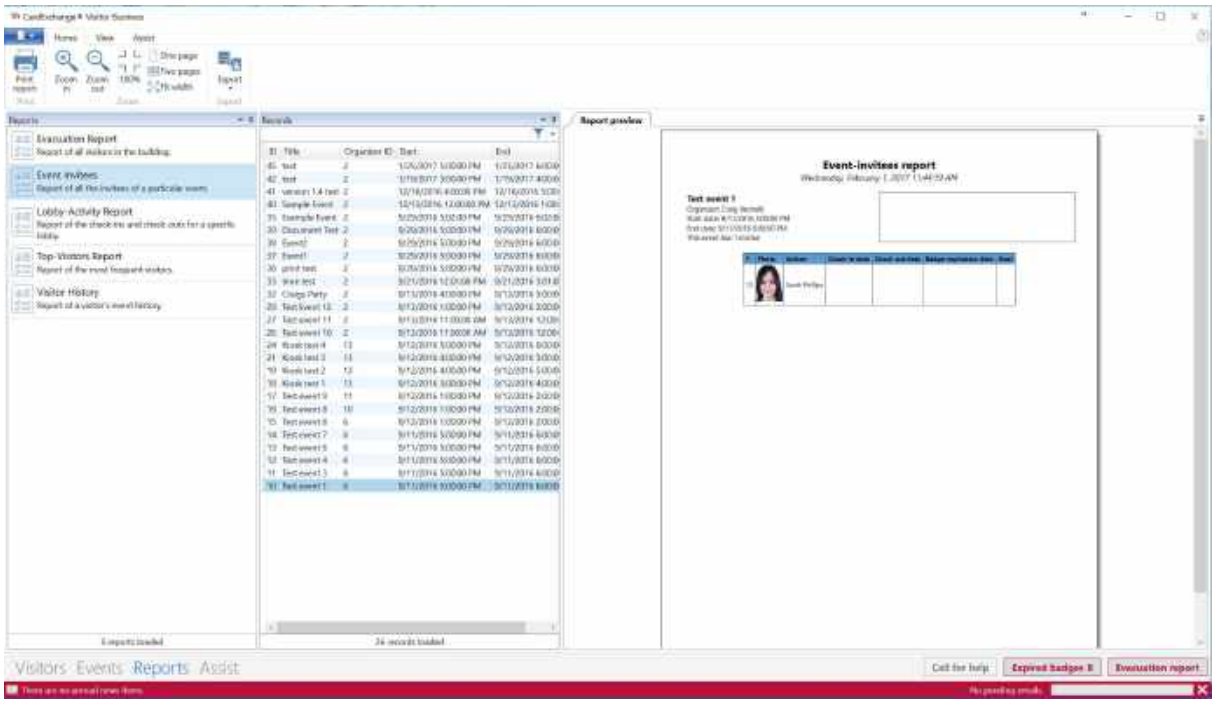
7.2 Event Invitees



The Event Invitees report allows you to select any event and see a list of all Invitees for that event, their check-in/check-out dates and a description of their visit.
The report can either be printed or exported to a .csv/.xlsx file using the corresponding buttons in the ribbon.

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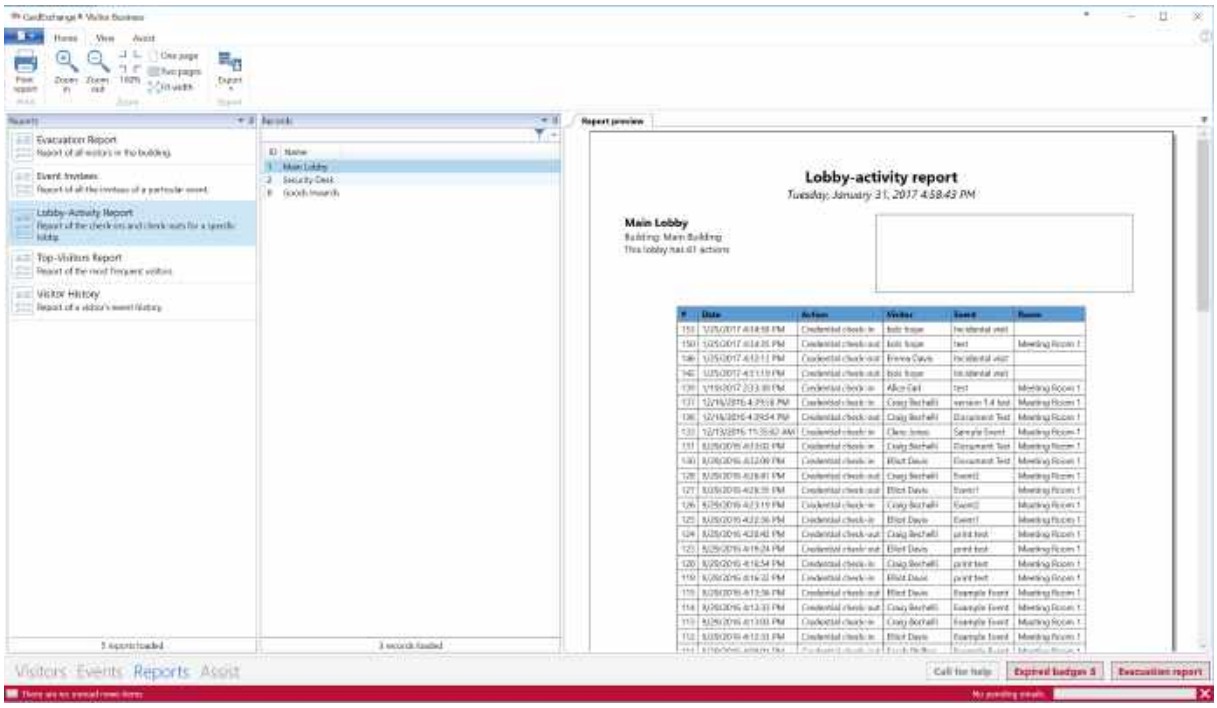
7.3 Lobby Activity



The Lobby-activity report allows you to select any of the defined lobbies and see a history of all activity, the visitor name, event name and check-in/check-out dates/times.
The report can either be printed or exported to a .csv/.xlsx file using the corresponding buttons in the ribbon.

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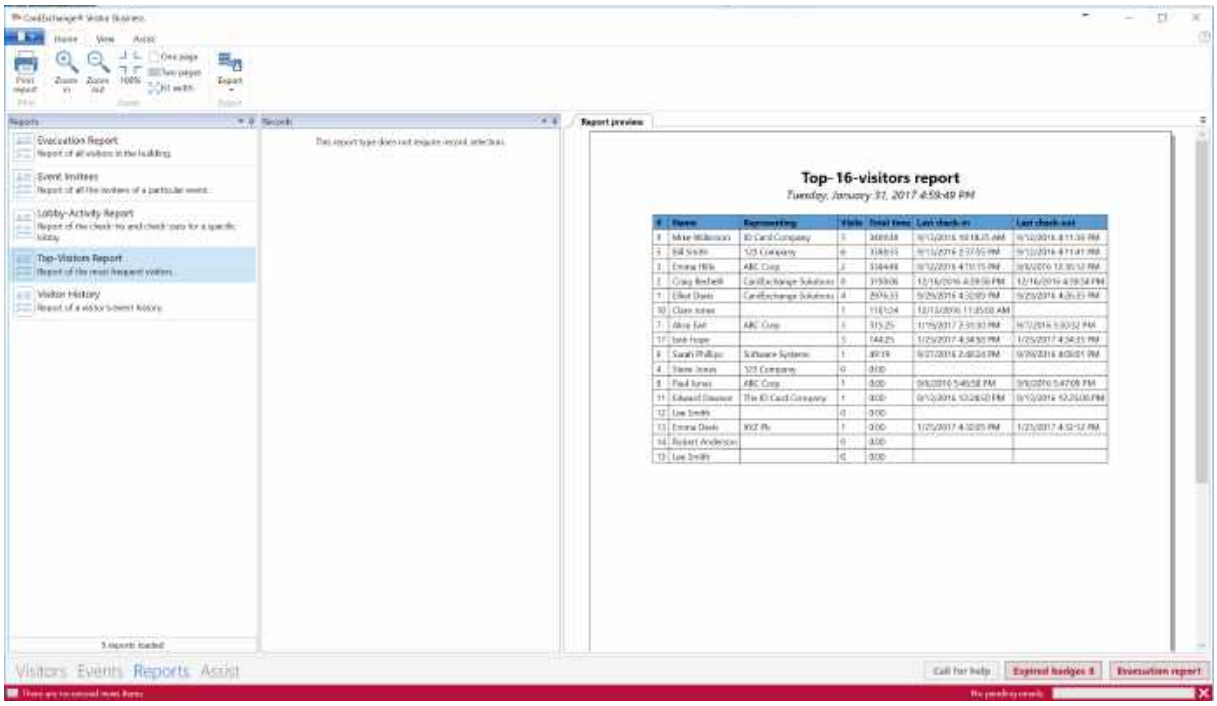
7.4 Top Visitors



The Top visitors report shows you the 16 most frequent visitors, the number of visits each visitor has made, the company they are representing and the last check-in/check-out dates. The report can either be printed or exported to a .csv/.xlsx file using the corresponding buttons in the ribbon.

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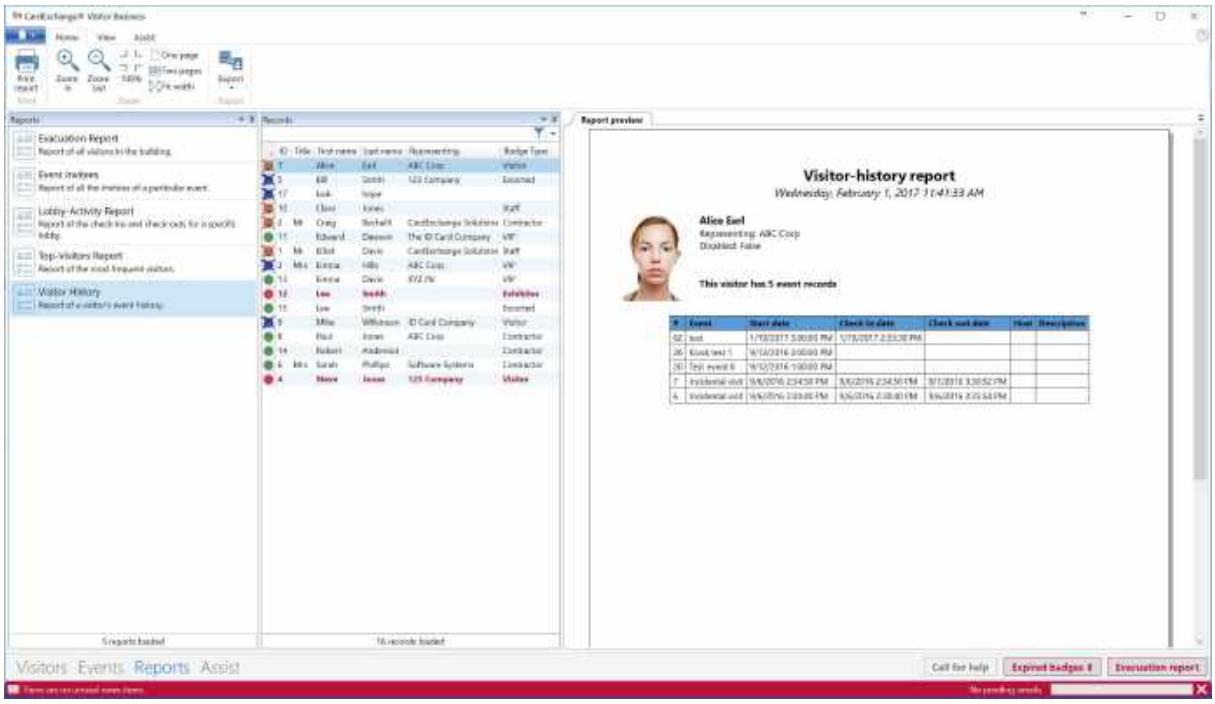
7.5 Visitor History



The Visitor History report allows you to select any visitor and see a history of all their visits including check-in/check-out dates and a description of their visit.
The report can either be printed or exported to a .csv/.xlsx file using the corresponding buttons in the ribbon.

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8 Working With Assist

With the release of CardExchange® Visitor we bring unique innovation to your desktop by offering everything that you need to produce cards in a fast and secure way at hand in **CardExchange® Visitor Assist**.

Help, Forum, Videos, etc., it is all available in this section of your CardExchange® Visitor product. When you enter the Assist view by selecting the corresponding view, you will directly see an Outlook style interface showing on the left the available news items and on the right the content of this news item.

CardExchange® Visitor uses this section to keep you informed about new updates and release plans so you will always be able to run the latest version. But also the reseller who has sold the product to you will keep you informed about his latest and greatest.

Take a look at the separate subjects and see how this is going to benefit you!

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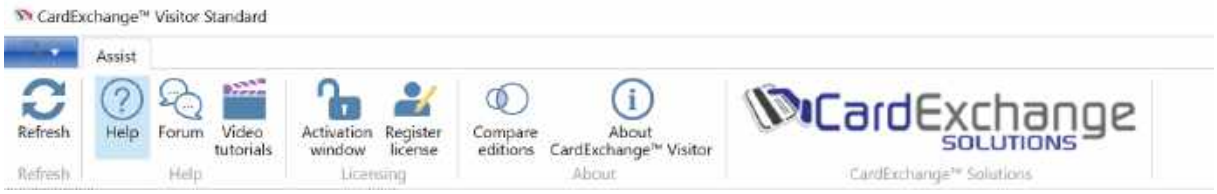
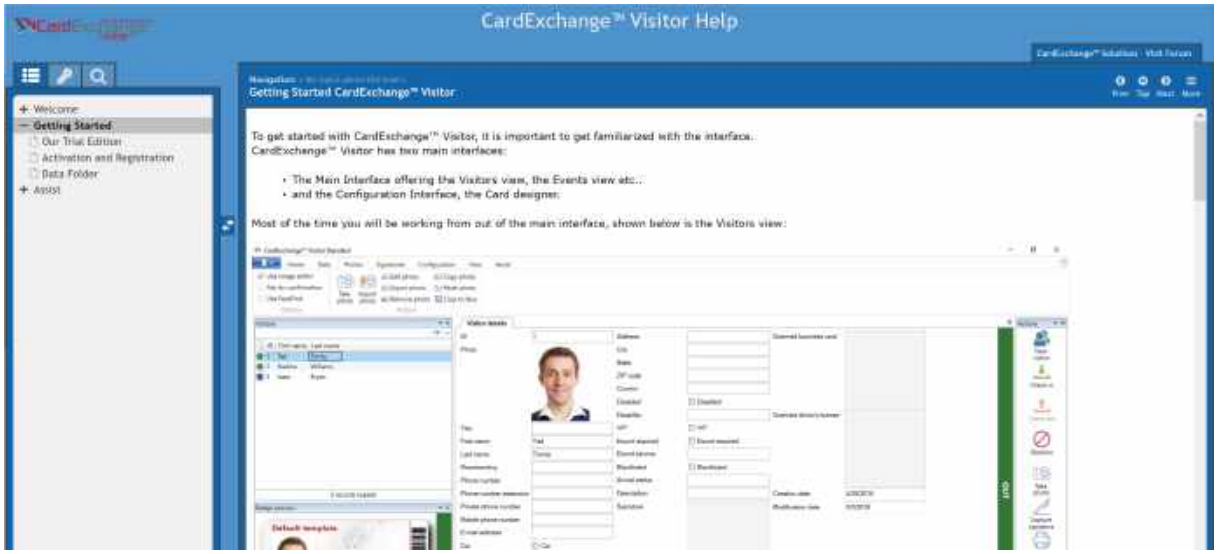
8.1 Help



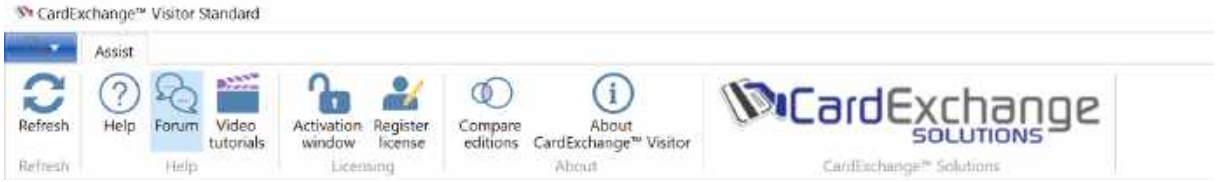
You have access to the online help file directly by clicking on the Help button indicated with in blue.



Our online Help files are always up to date and contain examples with each available functionality. On the left side you see all the available and selectable subjects, and on the right the content of the selected subject. Of course you need to have an online internet connection. When no internet connection is available, the internal Help file will be loaded:

We always strive to have the internal Help file updated to with the latest release but unfortunately we cannot guarantee this.

8.2 Forum



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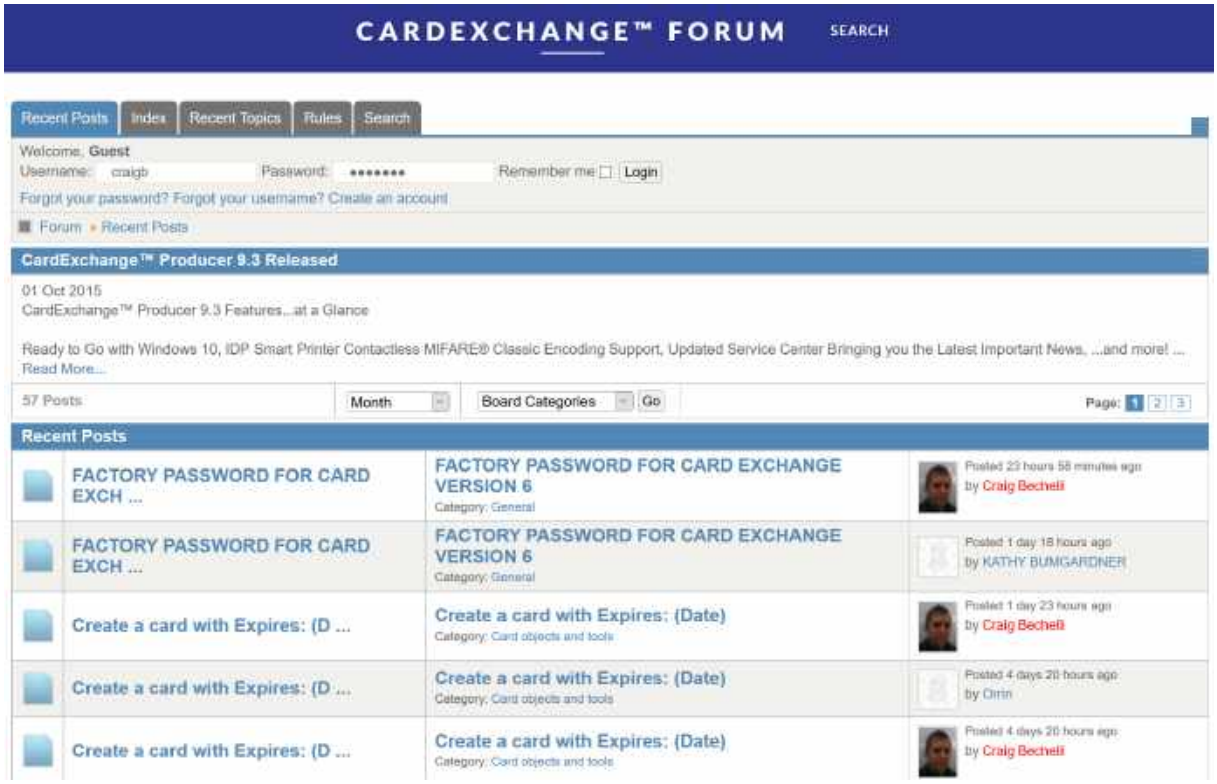
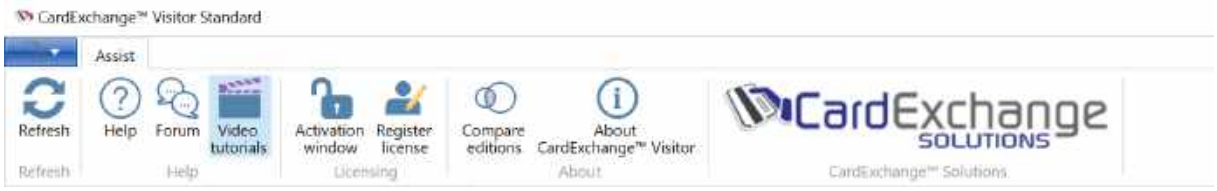
Unique for our industry is our end-user forum. On this forum you can find information from and by other users of CardExchange® Visitor.



Take a look at all the recent topics and search for solutions you need. Is your solution not available, just register yourself and post it on the forum. Besides other high level users of CardExchange® Visitor, all our support and our developers are answering forum questions.

Are you looking for answers and solutions? This is the place to be. Don't forget, by posting your questions you are not only helping yourself, you are also helping other users of CardExchange® Visitor!

8.3 Video Tutorials



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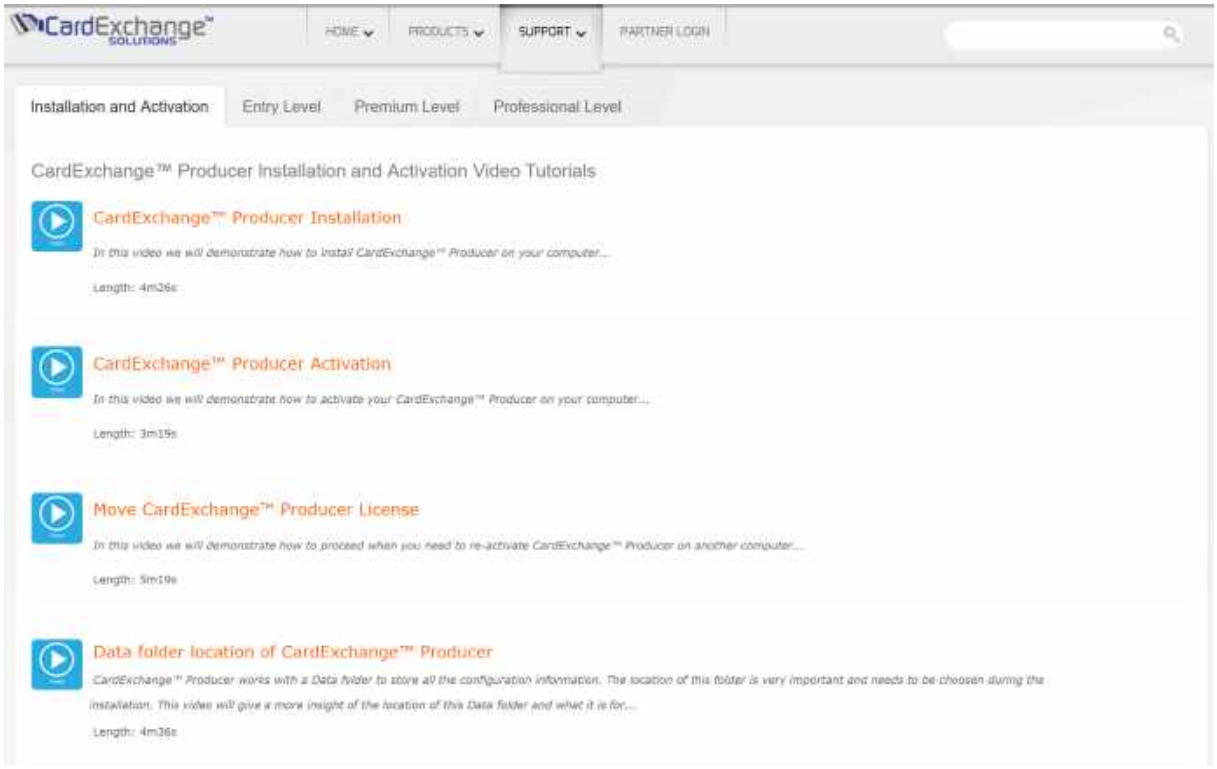
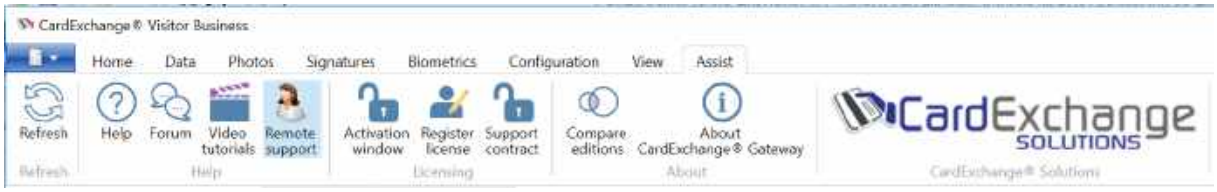
Sometimes it is handy to see how things are done in stead of reading text or other information. Therefore CardExchange® Visitor offers a large selection of How-To Videos in our Video Tutorials section.



In this section you can find videos about **installing CardExchange® Visitor**, **activating your license**, **Adding new visitors, creating new events, taking photos**, **etc**.

8.4 Remote Support



For customers with an active CardExchange® Assist Premium software support plan, we offer the possibility to directly launch a remote support session with us from the Assist tab.

You will need to contact our support department first to arrange this with an available technical support representative.

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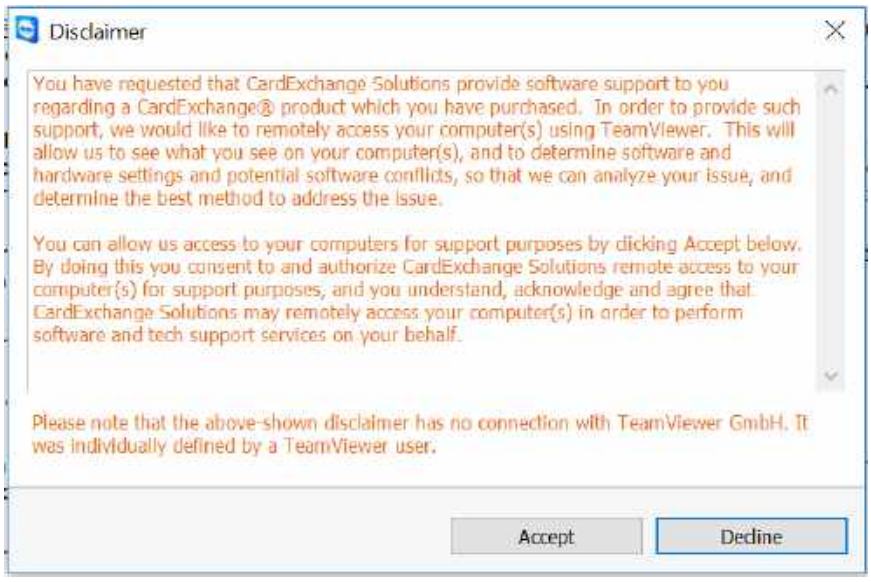

After clicking the remote support button, the disclaimer will be displayed. If happy you can click on accept.

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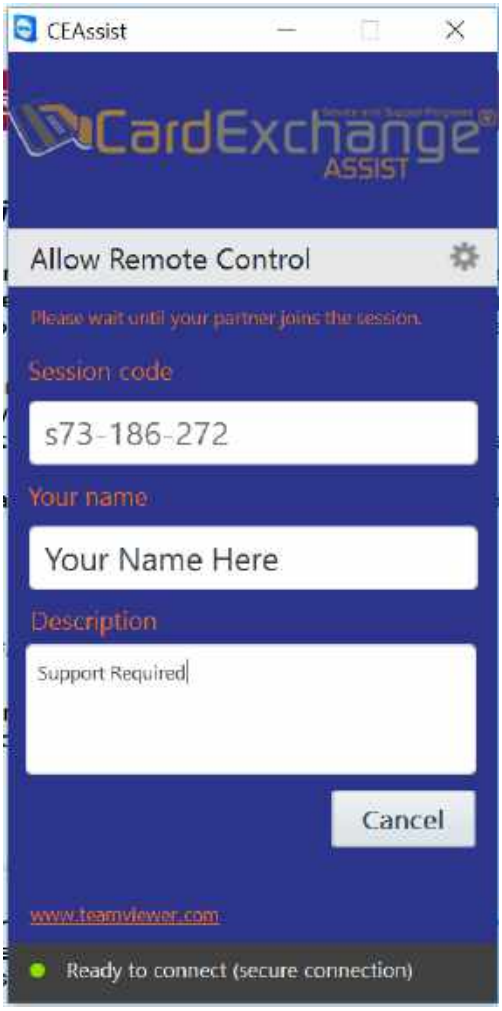
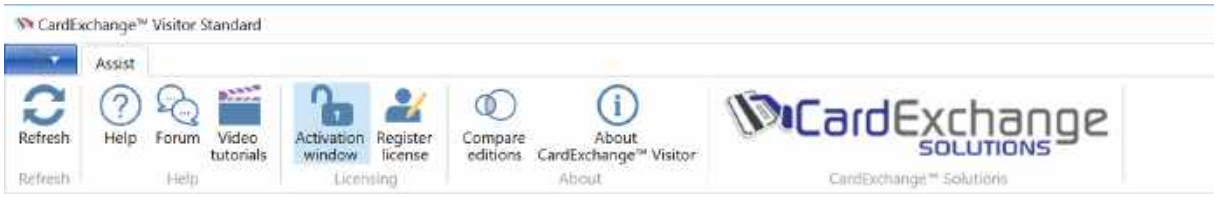


You can then specify your name and a description for the remote session if desired. Once the technical support representative is ready they will initiate the connection automatically.

8.5 Activation Window



In the section Activation and Registration 16 we have explained how you activate your new CardExchange® Producer license. When you decided that you want to upgrade to a higher edition, and you have ordered the upgrade, you have probably received a new serial number and activation code via email from your reseller.

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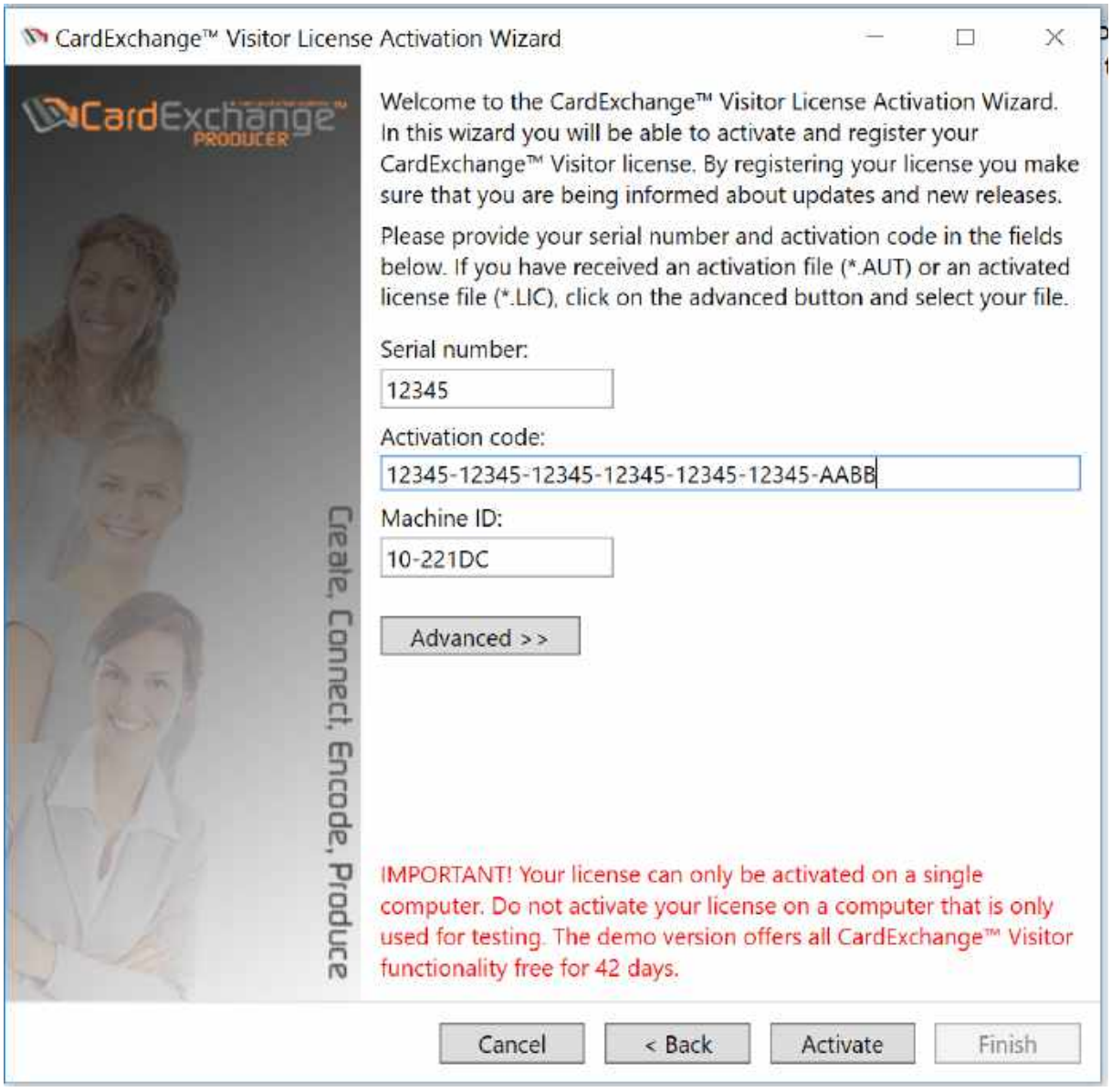
To get to the higher edition, you will have to activate the new license first. To activate your upgrade, click in the **Activation Window** button indicated and the **CardExchange® Visitor License Activation Wizard** will start.



Enter the **serial number** and **activation code** into the text boxes and click on **Activate** to start the process.

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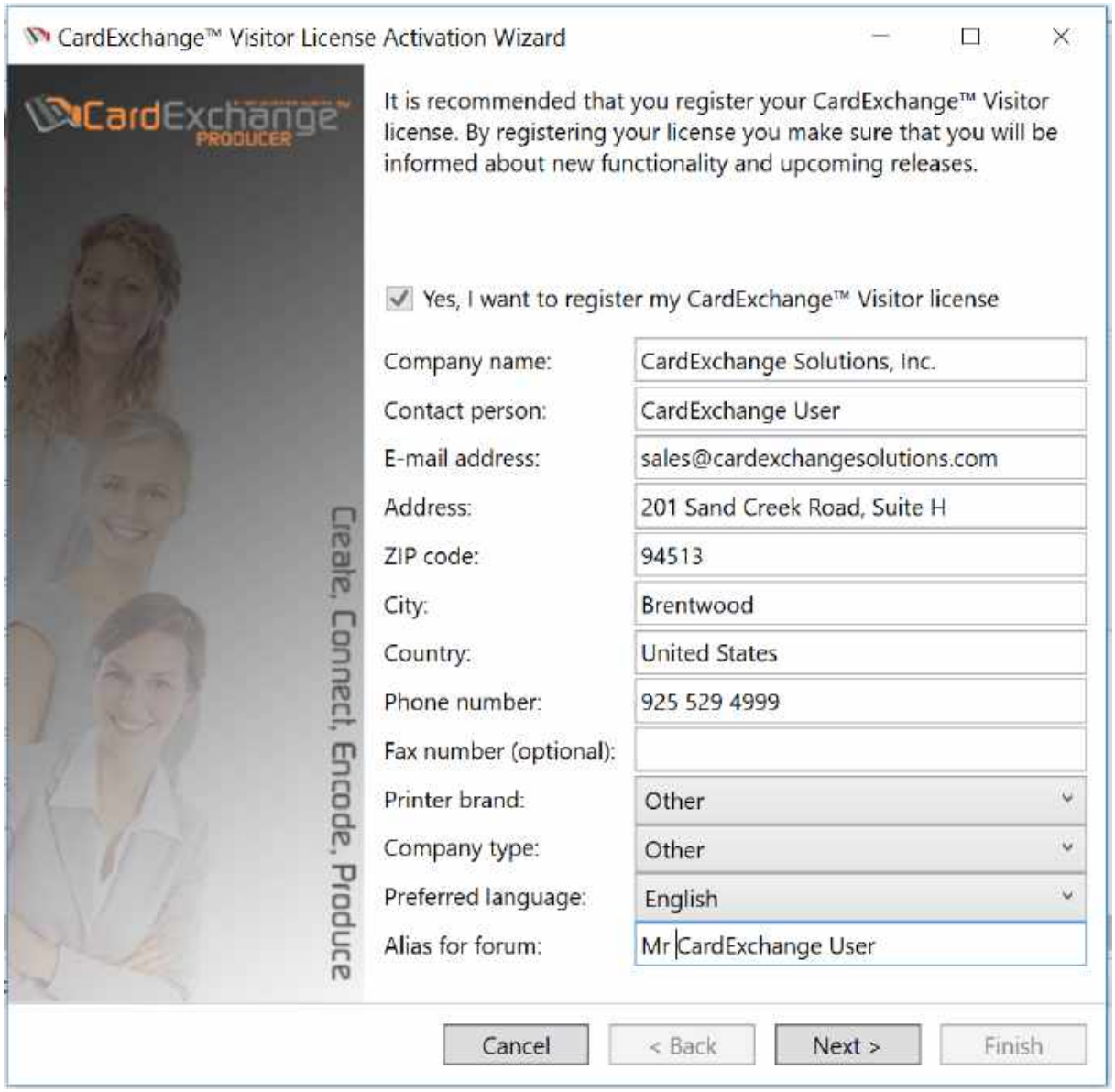

If needed you can make changes to your previous registration information, if not, click **Next** to proceed.

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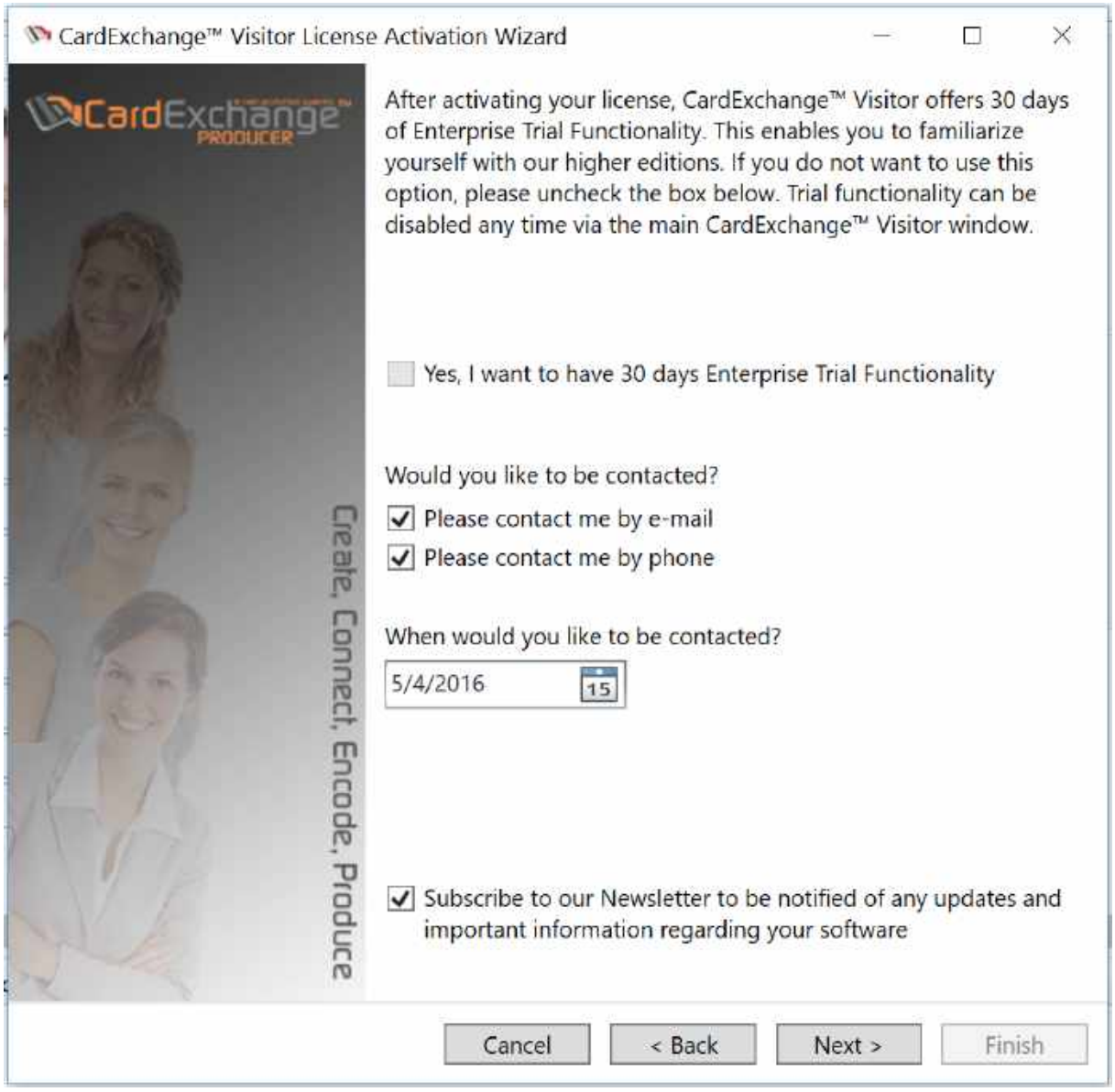

If you would like to be contacted, just select how and when, and your reseller will contact you on the preferred date selected. You can also change your subscription to our newsletter.

Click **Next** to proceed to the Final page of the **activation** process.

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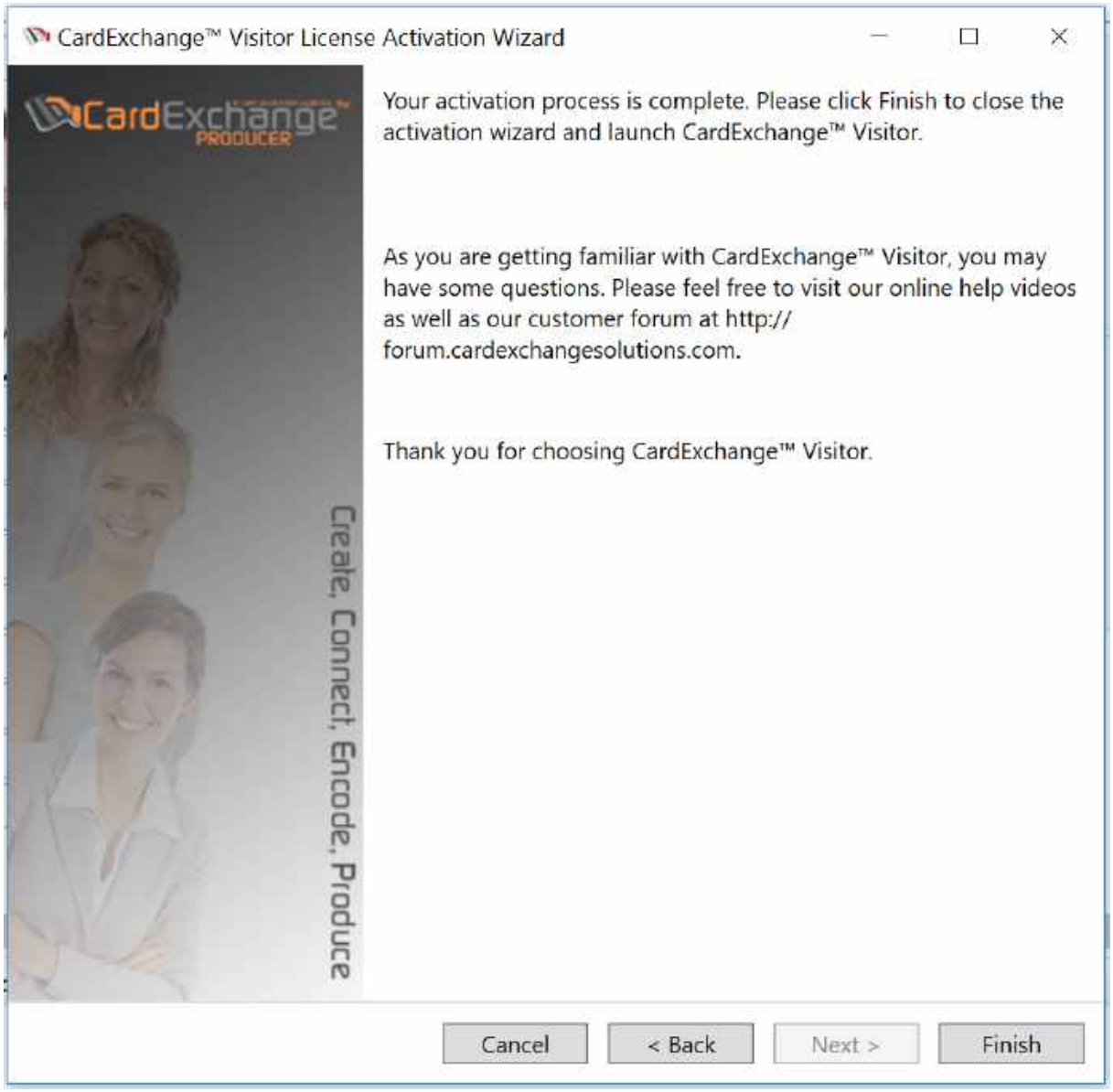

When you click on **Finish**, the dialog below will pop up prompting you to restart. Click on **OK** to confirm and restart CardExchange® Visitor.

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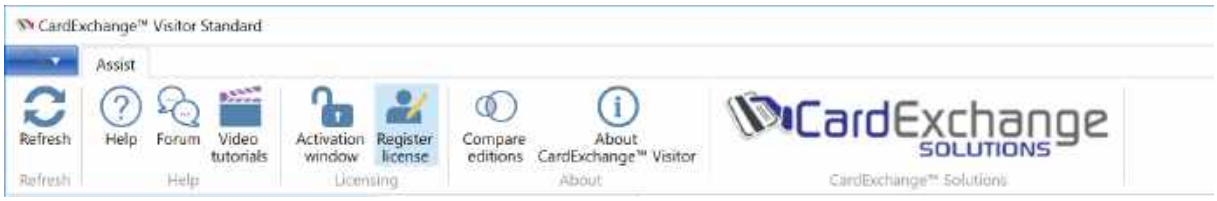
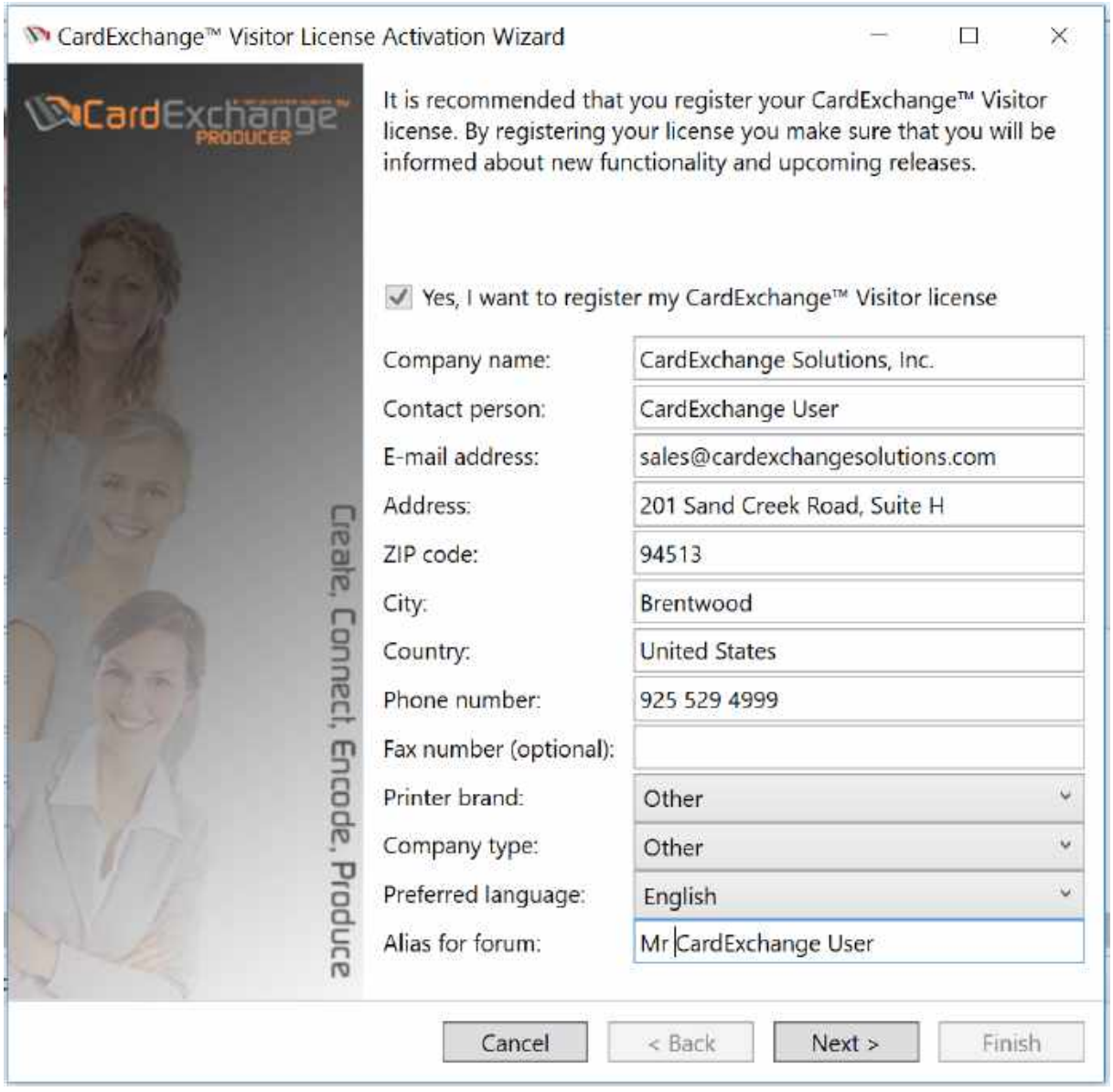
8.6 Register License



When you have registered your software, you can always update your registration information. Click on the Register License button indicated and **CardExchange® Visitor License Activation** Wizard will start.



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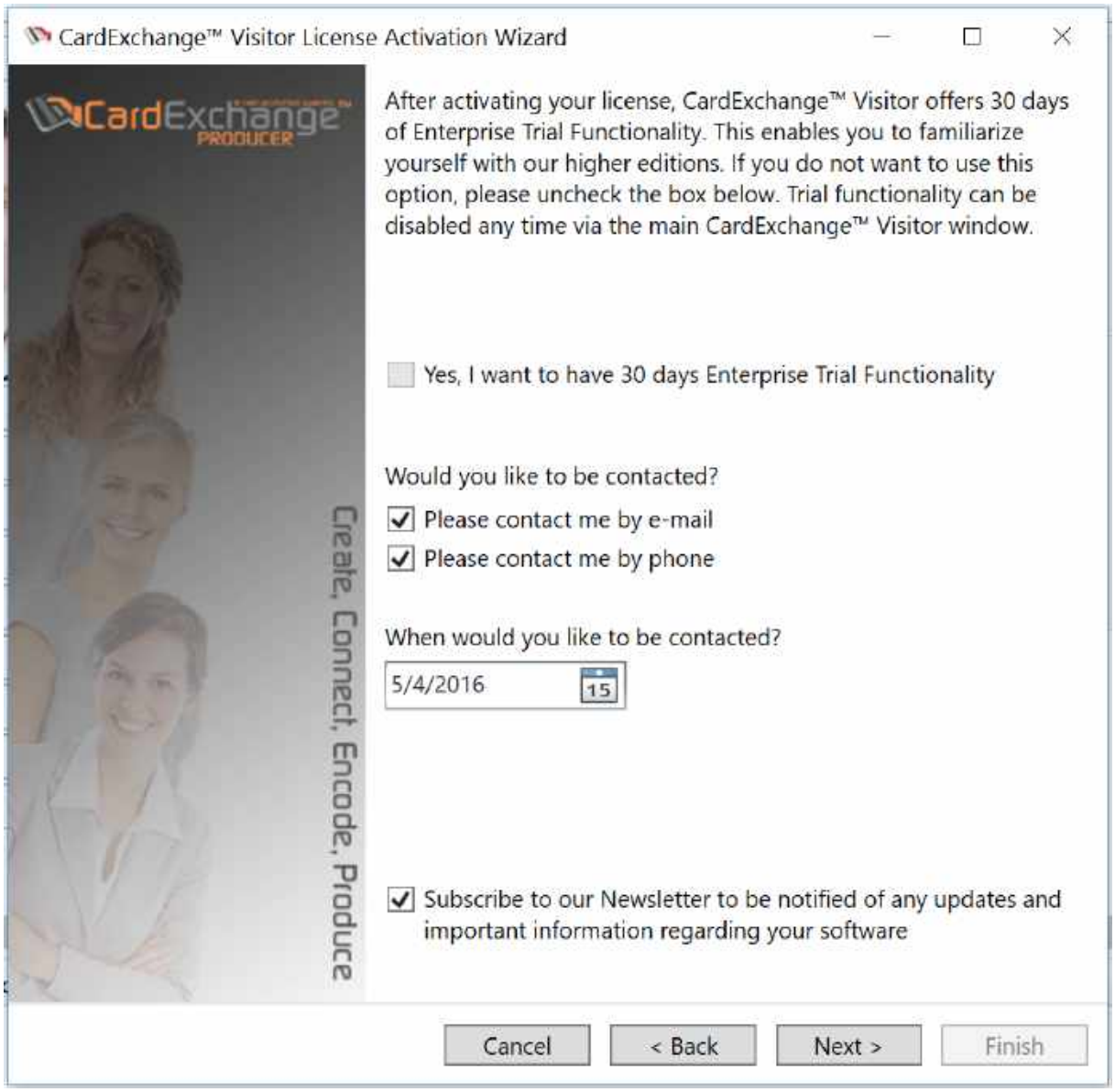
The registration process is a part of the activation process and therefore the same process is used. It does not effect your license information, only your registration information.

Now change the information you want to change and proceed to the Next page when done.



If you would like to be contacted, just select how and when, and your reseller will contact you on the preferred date selected. You can also change your subscription to our newsletter.

Click **Next** to proceed to the Final page of the **Registration** process.

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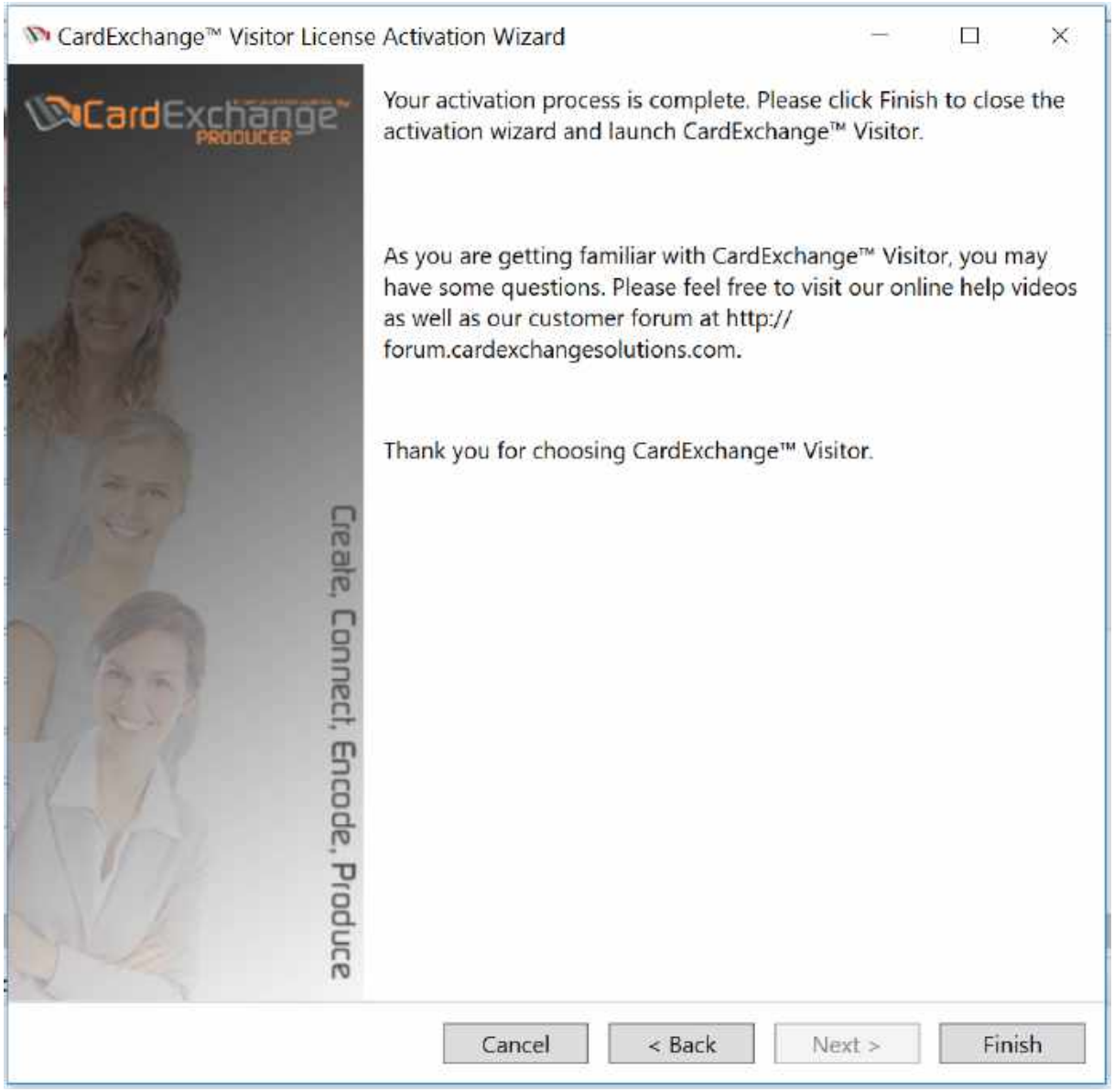
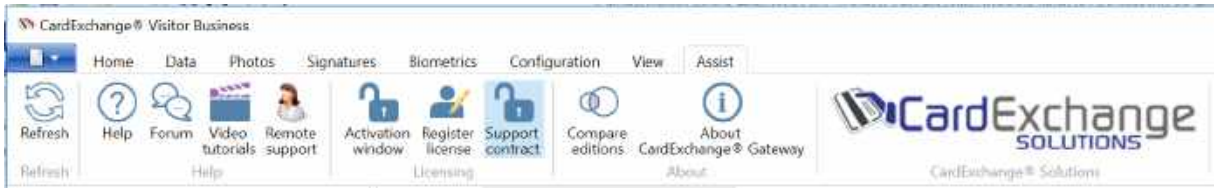


8.7 Support Contract



If you have purchased a CardExchange® Assist Premium support contract, you can activate it by clicking the Support contract button under the Assist tab.

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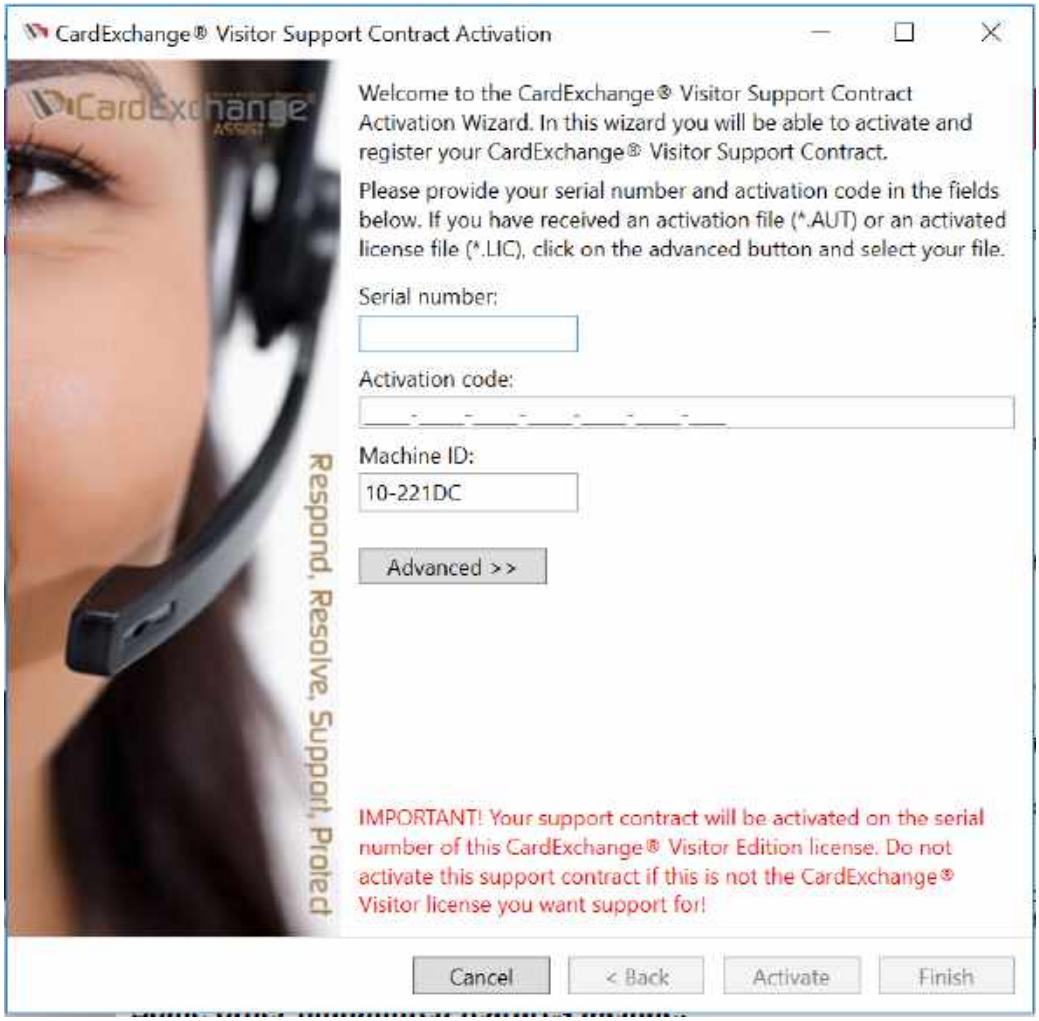

You will be prompted to enter your serial number and activation code that you received when purchasing the support plan.

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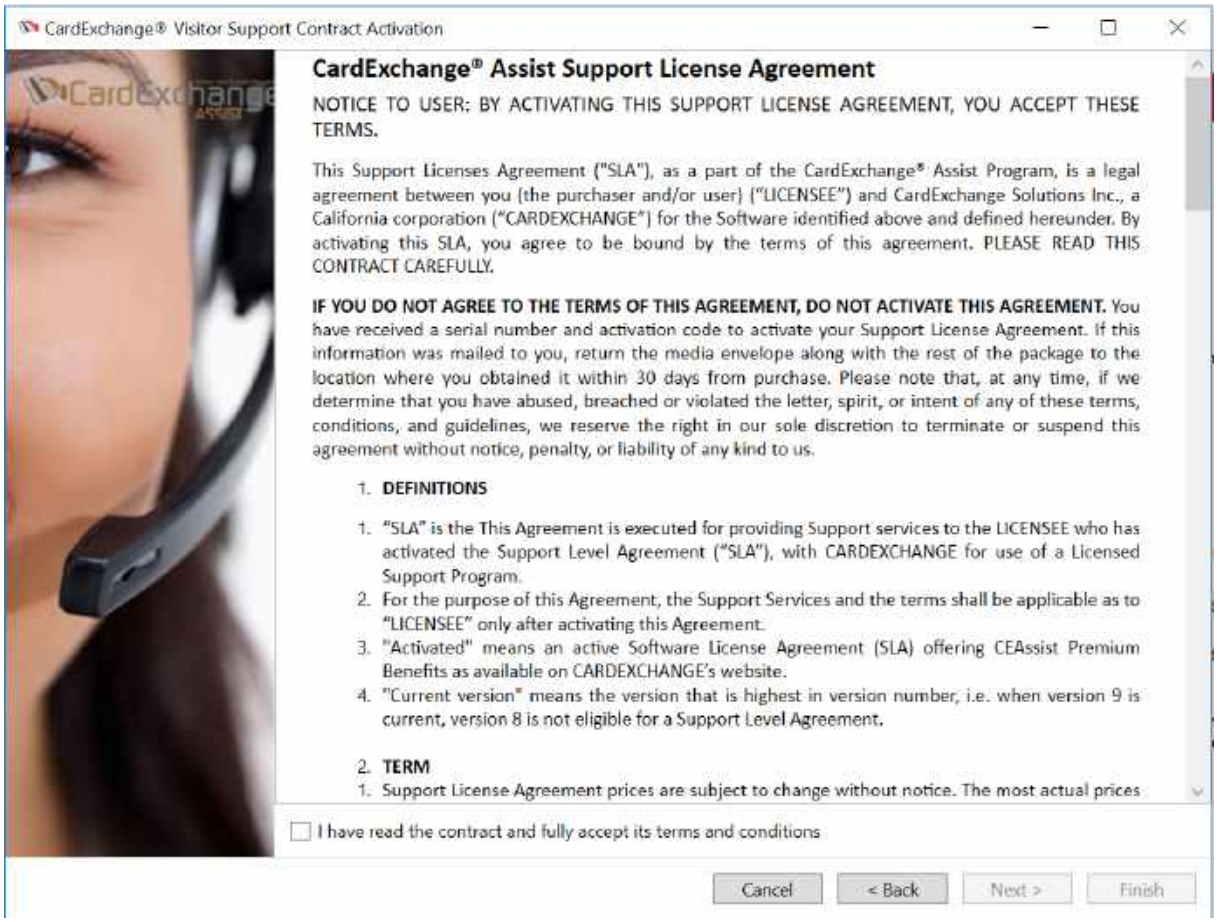

Clicking on Activate will display the license agreement.
A copy of the terms can be found here 305.

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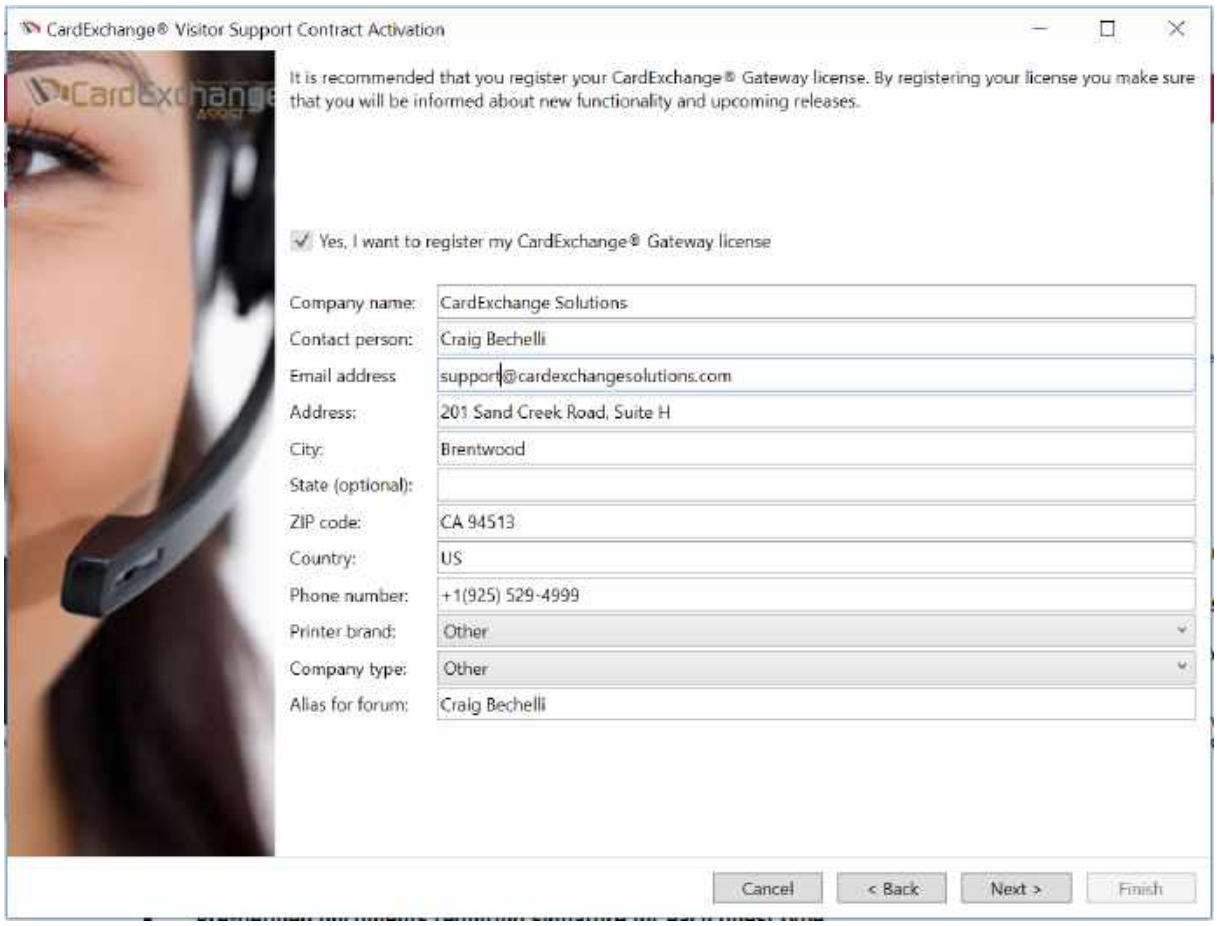

Once you have checked the box to agree the terms and conditions you will be prompted to register (Registration is mandatory for software support plans).
If you have already registered your CardExchange® Producer license then the current registration details will be displayed.

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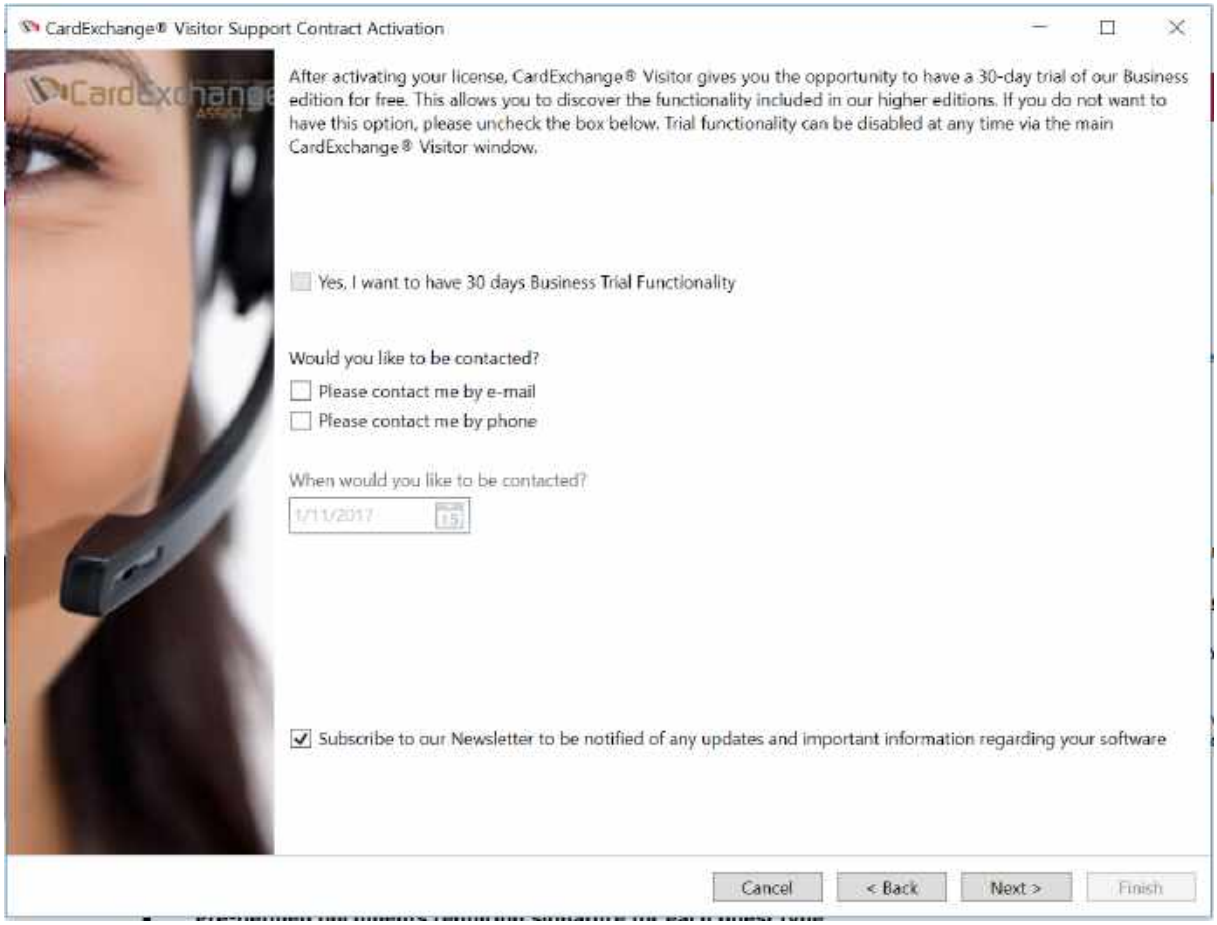

Clicking on next will allow you to subscribe or unsubscribe from our newsletter.

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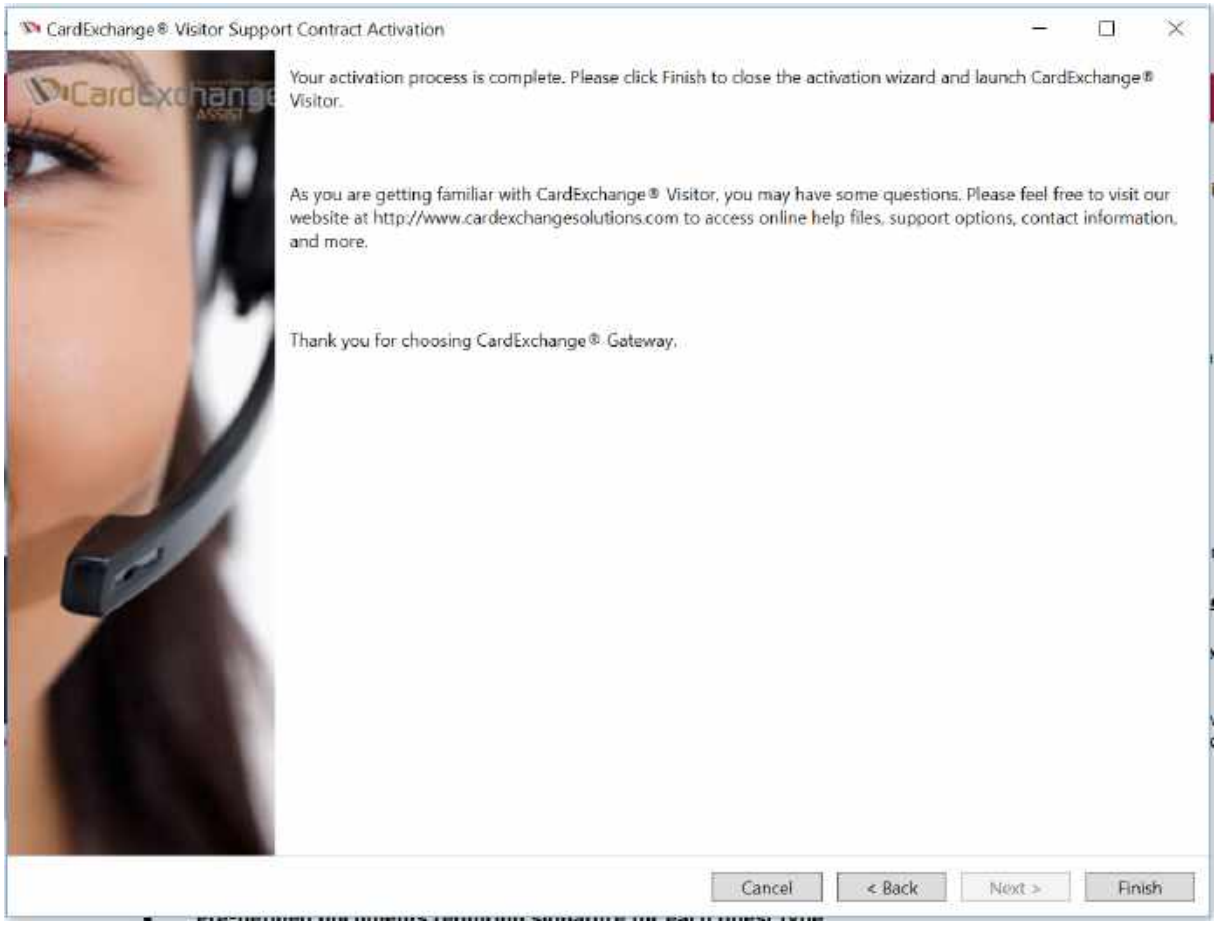
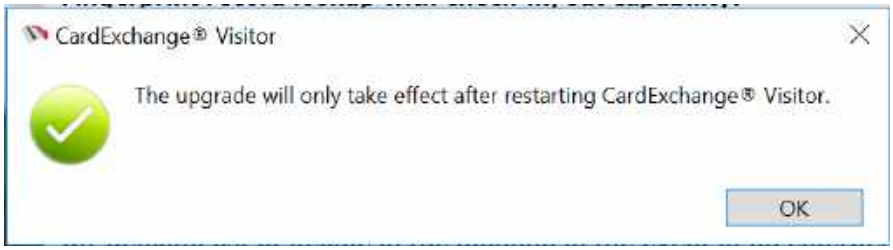


You then just need to click finish to complete the activation.



8.7.1 Support License Agreement

CardExchange® Assist Support License Agreement

NOTICE TO USER: BY ACTIVATING THIS SUPPORT LICENSE AGREEMENT, YOU ACCEPT THESE TERMS.

This Support Licenses Agreement ("SLA"), as a part of the CardExchange® Assist Program, is a legal agreement between you (the purchaser and/or user) (“LICENSEE”) and

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CardExchange Solutions Inc., a California corporation (“CARDEXCHANGE”) for the Software identified above and defined hereunder. By activating this SLA, you agree to be bound by the terms of this agreement. PLEASE READ THIS CONTRACT CAREFULLY.

IF YOU DO NOT AGREE TO THE TERMS OF THIS AGREEMENT, DO NOT ACTIVATE THIS AGREEMENT.

You have received a serial number and activation code to activate your Support License Agreement. If this information was mailed to you, return the media envelope along with the rest of the package to the location where you obtained it within 30 days from purchase. Please note that, at any time, if we determine that you have abused, breached or violated the letter, spirit, or intent of any of these terms, conditions, and guidelines, we reserve the right in our sole discretion to terminate or suspend this agreement without notice, penalty, or liability of any kind to us.

1. DEFINITIONS

1. “SLA” is the This Agreement is executed for providing Support services to the LICENSEE who has activated the Support Level Agreement (“SLA”), with CARDEXCHANGE for use of a Licensed Support Program.
2. For the purpose of this Agreement, the Support Services and the terms shall be applicable as to “LICENSEE” only after activating this Agreement.
3. "Activated" means an active Software License Agreement (SLA) offering CEAssist Premium Benefits as available on CARDEXCHANGE’s website.
4. "Current version" means the version that is highest in version number, i.e. when version 9 is current, version 8 is not eligible for a Support Level Agreement.

2. TERM

1. Support License Agreement prices are subject to change without notice. The most actual prices are always available in CARDEXCHANGE’s web store.
2. This Support Level Agreement does not include installation or configuration support.
3. Support Level Agreements (SLA) are only available for current versions of CARDEXCHANGE’s software products and custom services.
4. Support Level Agreements (SLA) are exclusively activated on the CardExchange® Product and Edition. This SLA cannot be transferred to another product serial number after activation.
5. The term of this Agreement shall commence on the date of activation and shall remain in force for one (1) year. This Agreement will NOT automatically be renewed! 30 days before the expiration of this agreement, the LICENSEE will be notified of renewal options. LICENSEE renewal of this agreement

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before expiration this agreement expires, offers a discount of 10% on the annual fee.

6. When this Support Level Agreements (SLA) is renewed before the Anniversary date, the renewed agreement will be in force for one (1) year plus the remaining time left of the moment of renewal until the Anniversary date.
7. In the event that LICENSEE fails to renew the Annual Support Level Agreement fee on or before the Anniversary Date, this Agreement shall be deemed automatically terminated.

3. SUPPORT SERVICES

1. EXCHANGE will provide LICENSEE with support services as described in our Premium feature overview within business hours on Monday through Friday between 7am and 8pm US Eastern Time, except on holidays.
2. The support services under this SLA do not include any customizations, modifications. It also does not include configuration and installation of the software other than configuration to make the software work as indicated by the software manual. EXCHANGE offers separate installation packages pricing as well paid professional services.

4. RESPONSIBILITIES AND LIMITED WARRANTY

1. The LICENSEE will conduct in a courteous and professional manner with CARDEXCHANGE.
2. The LICENSE will use the provided tools provided by CARDEXCHANGE to maximize efficiency of this Agreement.
3. The LICENSEE will use the channels for communication provided by CARDEXCHANGE like support phone numbers, ticketing system, email addresses, etc.
4. The LICENSE will provide accurate information about the company and contact person during the activation process of the SLA.
5. The LICENSE will update the contact information when changes in the organization or contact person changes.
6. CARDEXCHANGE warrants that the Support Services will be provided in conformance with the terms of this Agreement and CARDEXCHANGE does not make any other warranties, whether expressed or implied, whether regarding the performance of the Licensed Program or the services provided under this Agreement.
7. LICENSEE agrees that CARDEXCHANGE has not warranted recovering any data or other information contained in the Designated System. CARDEXCHANGE shall not be liable for any loss of profits, loss of use, business interruption, loss of data, cost of cover or any indirect, special, incidental, exemplary, punitive or consequential damages of any kind in connection with or arising out of the furnishing, performance or Use of the

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Licensed Program or services performed hereunder, whether alleged as a breach of contract or tort conduct, including negligence even if advised of the possibility of such damages. Subject to the foregoing and notwithstanding anything to the contrary elsewhere contained, in no event shall the maximum aggregate liability of CARDEXCHANGE in connection with this Agreement exceed the Software Level Agreement fee paid by the LICENSEE in the six (6) months preceding the claim.

8. Neither party shall be in default or otherwise liable for any delay in or failure of its performance under this Agreement if such delay or failure arises by any reasons beyond its reasonable control, including any act of God, any acts of the common enemy, the elements, earthquakes, floods, fires, epidemics, riots, failures or delay in transportation or communications or utilities, or any act or failure to act by the other party or such other party's officers, employees, agents or contractors; provided, however, that lack of funds shall not be deemed to be a reason beyond a party's reasonable control.

5. WARRANTY DISCLAIMER

1. CARDEXCHANGE AND ITS SUPPLIERS DISCLAIM ALL WARRANTIES, WHETHER EXPRESS, IMPLIED, OR OTHERWISE, INCLUDING WITHOUT LIMITATION THE WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NON-INFRINGEMENT.

2. OUR SOFTWARE IS PROVIDED ON AN "AS IS" BASIS. YOU ASSUME THE ENTIRE RISK AS TO THE QUALITY AND PERFORMANCE OF THE SOFTWARE. SHOULD THE SOFTWARE PROVE DEFECTIVE, YOU ASSUME THE ENTIRE RISK OR COST ASSOCIATED WITH SUCH DEFECT AND ANY SERVICE AND REPAIR.

CARDEXCHANGE AND ITS LICENSORS DO NOT WARRANT THAT THE SOFTWARE IS FLAWLESS OR WILL OPERATE WITHOUT INTERRUPTION. THE SOFTWARE IS NOT DESIGNED, INTENDED, OR LICENSED FOR USE IN HAZARDOUS ENVIRONMENTS REQUIRING FAIL-SAFE CONTROLS. CARDEXCHANGE SPECIFICALLY DISCLAIMS ANY EXPRESS OR IMPLIED WARRANTY OF FITNESS FOR SUCH PURPOSES.

6. LIMITATION AND RELEASE OF LIABILITY

1. In no event shall CARDEXCHANGE, its licensors, or its suppliers be liable to you for any consequential, special, incidental, or indirect damages of any kind arising out of the delivery, performance, or Use of the software, even if CARDEXCHANGE or its licensors have been advised of the possibility of such damages. You agree that the liability of CARDEXCHANGE and its licensors for any claim, whether in contract, tort, or any other theory of liability will not exceed the amount of the license fee paid by you.

7. EXCLUSION OF ALL DAMAGES

8.

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TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT SHALL CARDEXCHANGE, ITS LICENSORS, OR ITS SUPPLIERS BE LIABLE FOR ANY CONSEQUENTIAL, INCIDENTAL, DIRECT, INDIRECT, SPECIAL, PUNITIVE, OR OTHER DAMAGES WHATSOEVER (INCLUDING, WITHOUT LIMITATION, DAMAGES FOR ANY INJURY TO PERSON OR PROPERTY, DAMAGES FOR LOSS OF BUSINESS INTERRUPTION, PROFITS, LOSS OF BUSINESS DATA, FOR NEGLIGENCE, OR FOR ANY OTHER LOSS WHATSOEVER) ARISING OUT OF OR IN ANY WAY RELATED TO THE USE OF OR INABILITY TO USE THE SOFTWARE, WHETHER BASED IN CONTRACT, TORT, NEGLIGENCE, STRICT LIABILITY OR OTHERWISE, EVEN IF CARDEXCHANGE, ITS LICENSORS, OR ANY SUPPLIER HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. THIS EXCLUSION OF DAMAGES SHALL BE EFFECTIVE EVEN IF ANY REMEDY FAILS OF ITS ESSENTIAL PURPOSE.

9. ASSIGNMENT AND AMENDMENT

LICENSEE may assign its obligations under this Agreement to a third party individual or entity subject to the prior written consent of CARDEXCHANGE. No amendment to this Agreement shall be valid unless the same is in writing and signed by both parties. Both parties agree that they are not bound to any oral representations and warranties made concerning the services under this Agreement.

10. APPLICABLE LAW AND DISPUTES

1. This SLA, and any further agreements resulting therefrom, including any question regarding the existence, validity, or termination thereof, shall exclusively be governed by and construed in accordance with California law without regard to any choice of law rules thereunder.
2. All disputes arising in connection with this agreement, or any further agreements resulting therefrom, including any question regarding the existence, validity or termination thereof, shall be submitted to the exclusive jurisdiction of the Contra Costa County, California, courts. The parties further agree that this Agreement was entered into in Contra Costa County, and is to be performed in Contra Costa County.

11. PRIVACY POLICY

1. USE OF DATA

When you download, use, or activate our Software or Support License Agreement (SLA), browse our website, or participate in our online forums, your IP address, the time and duration of your visit and use, the web browser you are using, the pages you view, and other information like how you are using the software, are sent to our servers. This information can be used to compile statistical reports about how you use our products and our website in order to improve our products, services, and support. If you choose to register for our forums, a valid email address is required. Our forums are

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moderated, and we reserve the right to remove anything we deem inappropriate and to restrict or delete any user account being used inappropriately.

2. FRAUD/PIRACY

We aim to keep your information safe. Credit card fraud, identity theft, and software piracy will not be tolerated. We may release any information necessary to comply with the law, protect our software licenses, and foremost to protect our valued customers. We will also work with law enforcement and fraud/credit agencies to ensure the safety of your information.

Should you have any questions concerning this SLA please contact us via:

Email: sla@cardexchangesolutions.com
Web: http://cardexchangesolutions.com/sla

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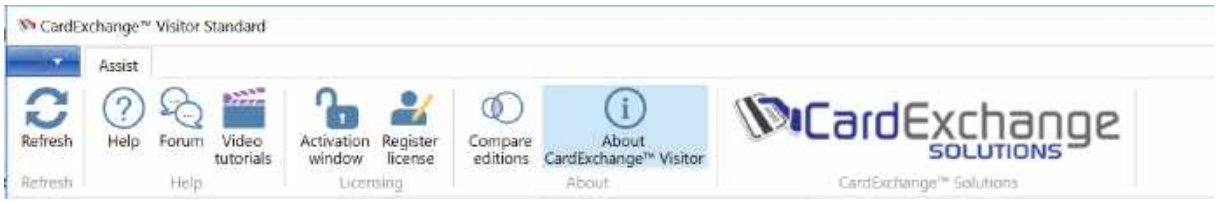
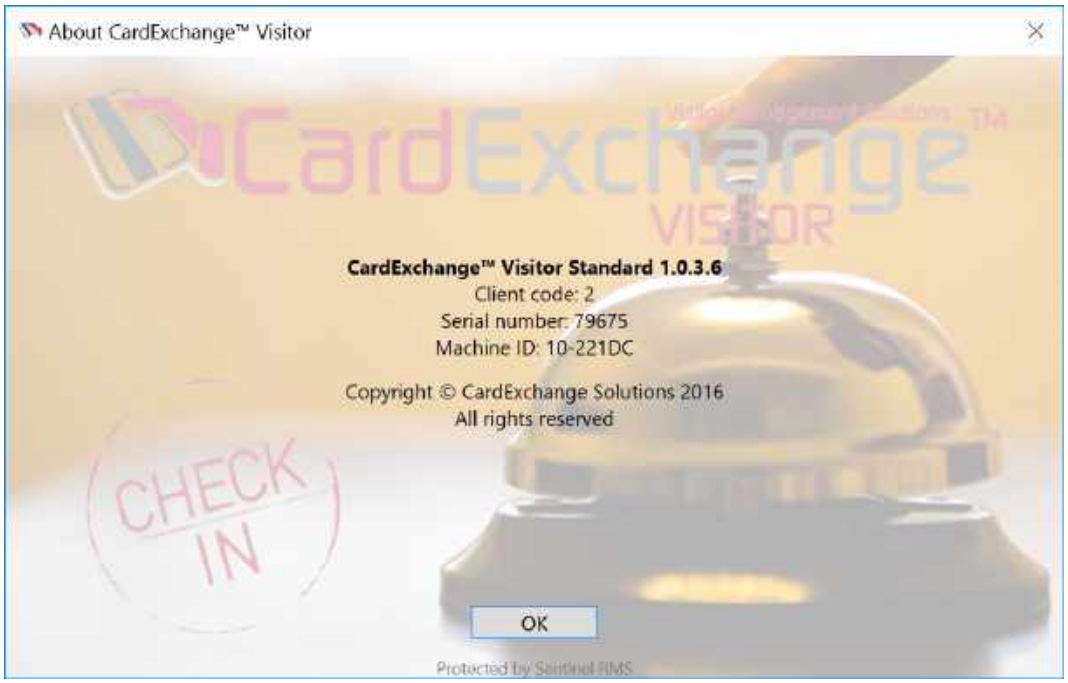
8.8 About CardExchange® Visitor

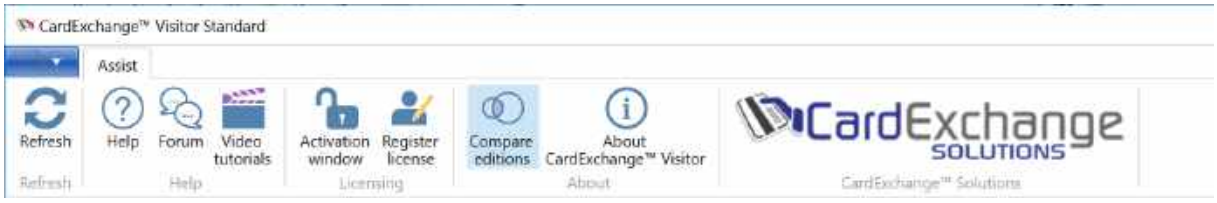


Sometimes when you need support you will be asked which edition and version you are running of CardExchange® Visitor. All this type of information can be found in the **About CardExchange® Visitor** section. Just click on the button indicated , and the window below will be presented:



In this window you can find the **edition** and **version** you are running. This can be important to see if you are running the latest version with regards to solved bugs.

You also can see your **serial number** which enables us or your reseller to request your **activation code**, if needed. It also contains the **Client code** of your license. The **Client code** indicated who has supplied your license. Last but least, it shows the **Machine ID**, the digital fingerprint of your computer for your CardExchange® Visitor license.



When you are running an Enter edition for example and you would like to know what type of functionality is offered in other editions of CardExchange® Visitor, just click on the **Compare editions** button indicated and it will bring you to the **Compare editions** section on our website:

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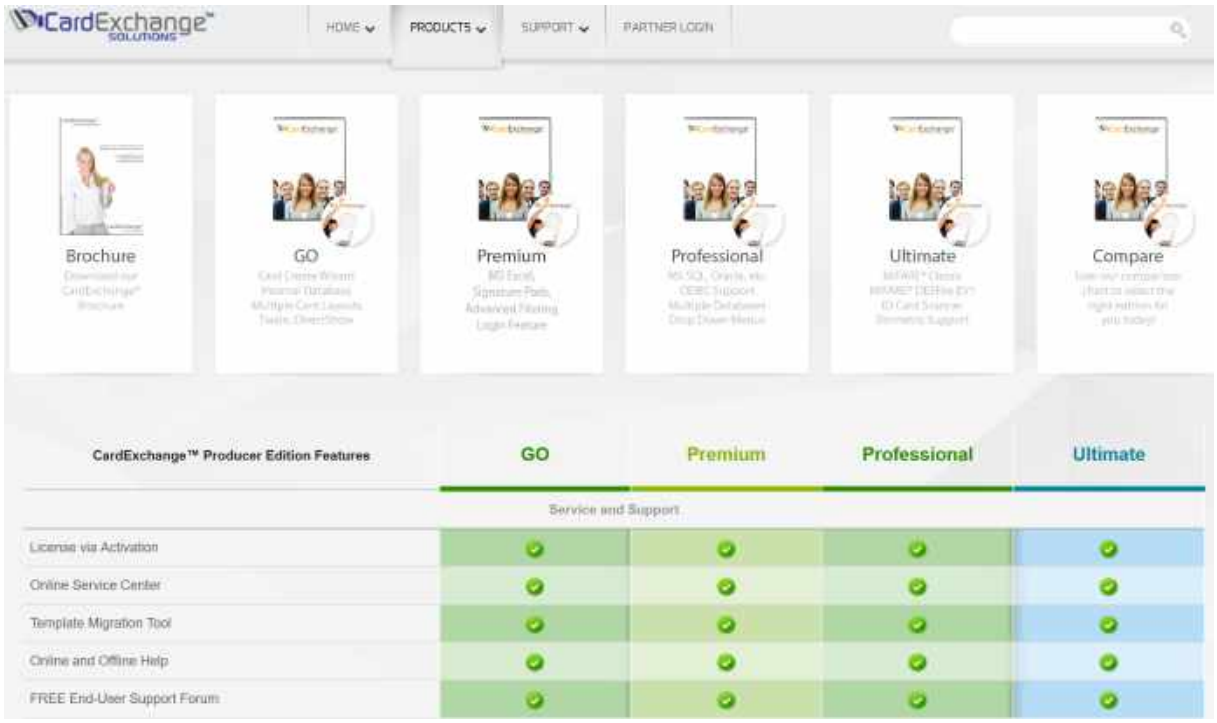
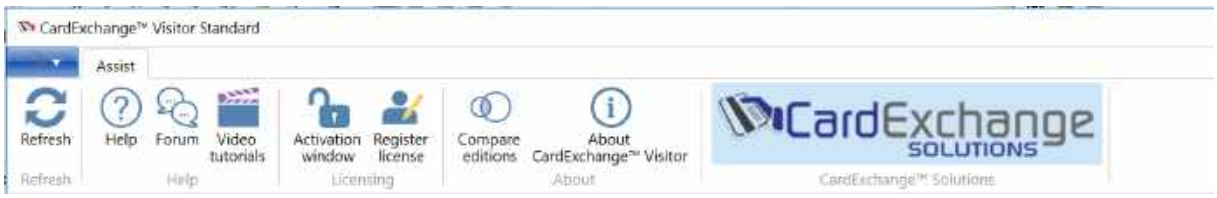


Here you can see all the offered functionality available for each separate edition.

8.9 Contact Information



All CardExchange® Visitor Resellers and Distributors have a long history in the Visitor Management market and can advice and help you to make the right choices. But unfortunately it is not always easy to know for the user of our software who supplied the software and were to go to for support.

With the release of CardExchange® Visitor we have solved that problem for you. At the section indicated you always find one button, this button contains the Company Logo of the CardExchange® Visitor partner that supplied you the software and if you click on the button, it will directly take you to their home page so you can find their contact information.

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When applicable, in the same section you can find a second button, that will take you directly to the web shop of our partner so you can buy upgrades, supplies, etc.

Together with all the other functionality offered in our Assist section, we strive to offer **high quality** with **high service** without limitations.

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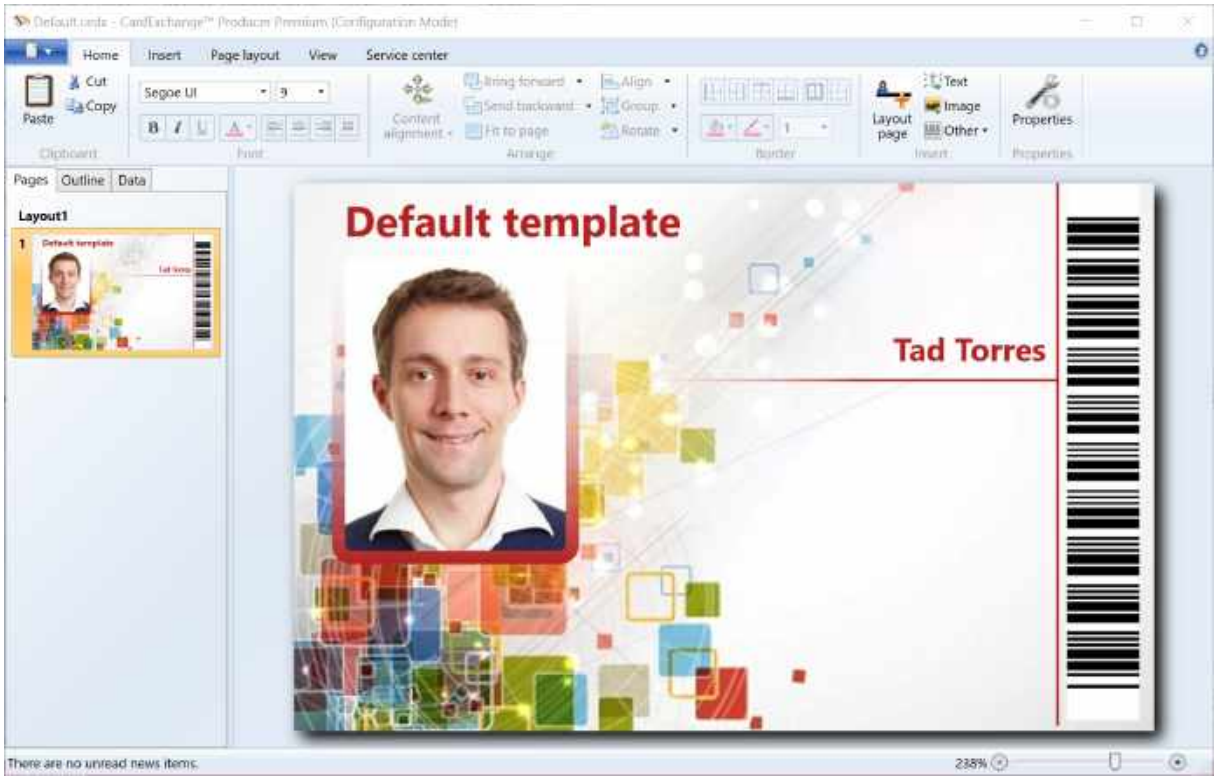
9 Using the Card Designer

With CardExchange® Visitor we use the same powerful designer interface that we developed for CardExchange® Producer. This card designer follows the latest Windows technology and is completely developed under the Windows Presentation Foundation (WPF) platform. For printing graphically, XPS printing technology is used.



The interface look and feel follows the latest Windows and Office look and feel. For the setup of the functionality we have chosen to follow flow of Microsoft PowerPoint which will make it very easy to find your way inside of CardExchange® Producer Designer.

CardExchange® Producer Designer is integrated in all editions of CardExchange® Visitor. When clicking on Card Designer, the CardExchange® Producer Designer will open mentioning the edition used, showing in Configuration Mode.

As the edition of CardExchange® Visitor increases it will include a higher edition of CardExchange® Producer Designer, it is also possible to have a higher edition of CardExchange® Producer Designer with lower editions of CardExchange® Visitor with a valid license.

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So for example you could have CardExchange® Visitor Standard edition along with a CardExchange® Producer Professional license, this would allow you to use conditional layouts in the Standard edition of CardExchange® Visitor. Or you could have a CardExchange® Visitor Standard edition with a CardExchange® Producer Ultimate license to allow you to use contactless encoding.

In this "Using the Card Designer" section of the manual we will refer to the editions of CardExchange® Producer.

The following is a guide to the CardExchange® Producer Designer functionality that is available as default in each edition of CardExchange Visitor®.

CardExchange® Visitor Edition	CardExchange® Producer Designer Features
Enter	Go
Standard	Premium
Business	Professional
Enterprise	Ultimate

All configuration is done in the Card Designer via easy drag and drop functionality (click functionality and drag it to the card design, the need for creating variables is limited to only very specific functionality like scripting (Available only in the Ultimate Edition).

Talking about scripting, the Card Designer (Ultimate Edition) contains full Python scripting language. General information about Python can be found by CLICKING HERE. For more detailed information about Python please CLICK HERE.

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9.1 Explorer Menu

Just like in the Main Interface 23, the Card Designer also contains an Explorer menu. Also here the Explorer Menu is based on the Explorer Menu as it is available in Microsoft® PowerPoint.

This Explorer Menu contains three tabs which are described in sub sections of this Help file.

The Explorer Menu gives an overview of all your created layouts, pages, connected data, etc.

9.1.1 Pages

When selecting the Page tab (default) all available and created Layouts and the available pages per layout are shown.

Simply click on the page or the layout header to select. Specific settings for the available Layouts can found in the Page Setup 323 section of this Help file.

How to Add Layouts 385 and Pages 385 can be found in these specific sections.

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9.1.2 Outline

When the Outline tab is selected you find a quick overview of all the available objects on the pages, in the Layouts, in the Template.

It is presented as a tree view and by hovering over each available object, a preview of the object is shown like in the screen shot, hovering over the Photo object shows the preview of the Photo.

9.1.3 Data

The Data tab is offering, depending on the edition used, four sub tabs:

- Database columns 318
- Manual Entries 319
- Variables 347

Not all tabs are available in every edition.

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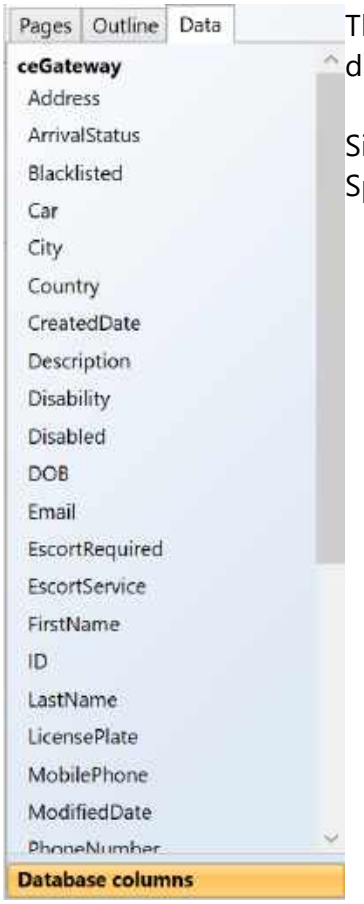
9.1.3.1 Database Columns



This tab contains all the available columns of the connected database.

Simply select the item and drag and drop it on your card design. Specific Properties can be set in the Properties 347 window.

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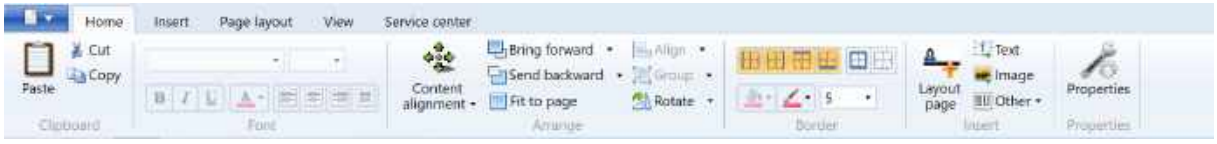
9.1.3.2 Manual Entries

All defined Manual entries are available in the Manual entries tab. You can drag and drop these fields onto your Page layout.

Please visit the Manual Entries 374 section of this Help file for more information about creating and configuring Manual Entries.

9.2 Ribbon Overview



Following the structure of Microsoft® Office, the Home tab reflects all the most common functionality needed.

Clipboard functionality for easy Copy, Cut, and Pasting. In the Font group you can easily set the font type, size, color, and outline the text.
CardExchange® Producer offers almost unlimited possibilities to outline your text and objects. Also borders can be easily set and colors can chosen.
The main objects for inserting are also available from the Home tab in the Insert group.
Last but not least, the Properties 347 window is called from the Home tab too.

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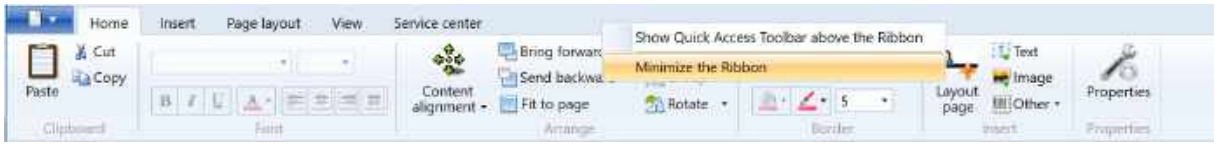
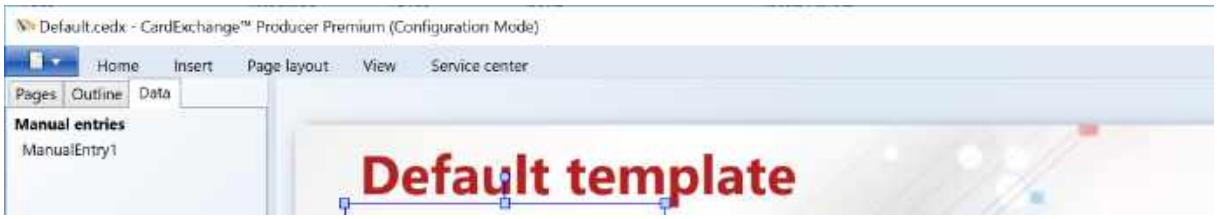
It is also possible to minimize the ribbon if you need more space on your design because you are using a smaller screen.



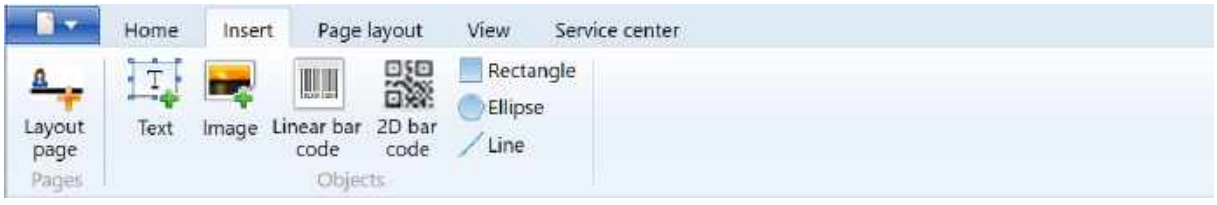
Right mouse click on one of the available tabs to open the context menu and select **Minimize the Ribbon**.



Now you only see the headers of the tabs and more space is offered. Clicking on the tab will have the Ribbon information expand. After selecting the functionality it will close again.

To restore the Ribbon, simple right mouse click on one of the tabs and deselect **Minimize the Ribbon** from the context menu.

9.2.1 Insert



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Just like in the Home tab, objects can be selected here.
When running a Professional or higher edition, it is also possible to add an extra Layout which needs to be selected here. When using multiple layouts you can set a condition for each layout to be automatically shown based on the value of a database column.

Via the Insert tab you can insert the following objects:

- Text 387
- Images 388
- 1D Barcodes 396
- 2D Barcodes 397
- Rectangles 400
- Ellipses 400
- Lines 400

IMPORTANT! The Layout button is not available in the Go and Premium Edition. Multiple Layouts are supported from Professional and higher.

9.2.2 Page Layout

The Page Layout tab reflects the first tab (Page) of the Page Setup window. If you want to add a Background color or Background Image, you can add this via the Background button. More information about the Page Setup can be found in the "Page Setup 323" section from this Help file. More information about how to use Backgrounds, please refer to our "Using Backgrounds 393" section of our Help file.

9.2.3 View

When the View tab is selected, you find two different groups:

Group	Function(s)	Description

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Zoom	Zoom in	Zoom in on the current page
	Zoom out	Zoom out on the current page
	100%	Zoom to 100%
	Fit template	Zooms the page that it fits the window
	Fit width	Zooms the page that the width of the page fits the width of the window
	Fit height	Zooms the page that height of the page fits the height of the window
Options	Language	Change the display language of the Designer (Designer edition only)
	Inches	Change the display units to inches
	Centimeters	Change the display units to centimeters
	Pixel	Change the display units to pixels

.

9.2.4 Service Center

The Service Center tab is organized in different groups with specific functionality.
This is the same as for the Assist tab in the main interface but this time focused around CardExchange® Producer Designer.

Group	Function(s)	Description
Refresh	Refresh	Refreshes the available news items
Help	Help	Opens this online help file
	Forum	Opens our FREE End-User Support Forum
	Video Tutorials	Opens our website at the How-To Video section
Licensing	Activation Window 16	Opens the Activation Wizard window
	Register License 16	Opens the Registration Wizard Window
About	Compare editions	Opens the website at the compare editions section
	About CardExchange	Opens the About dialog containing license and machineID info
[Vendor]	Vendor	Opens the vendor's website
	Vendor store	Opens the vendor's web store (if applicable)

For more detailed information about the Service Center, please visit the "Assist 288" section of this Help file...

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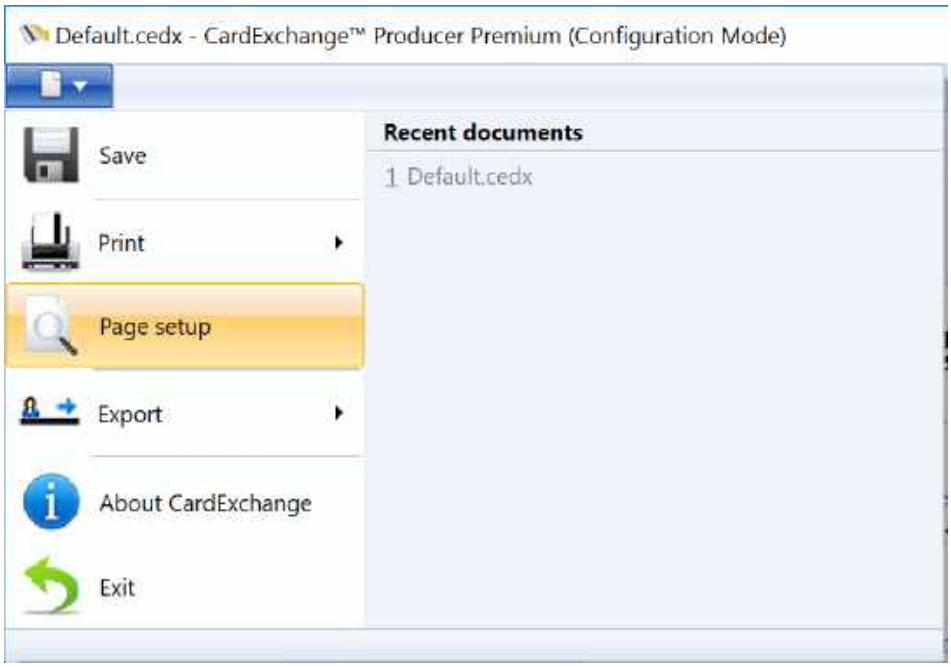
9.3 Page Setup



To start the Page Setup window, click on the Page Setup button in the Main Menu 346.

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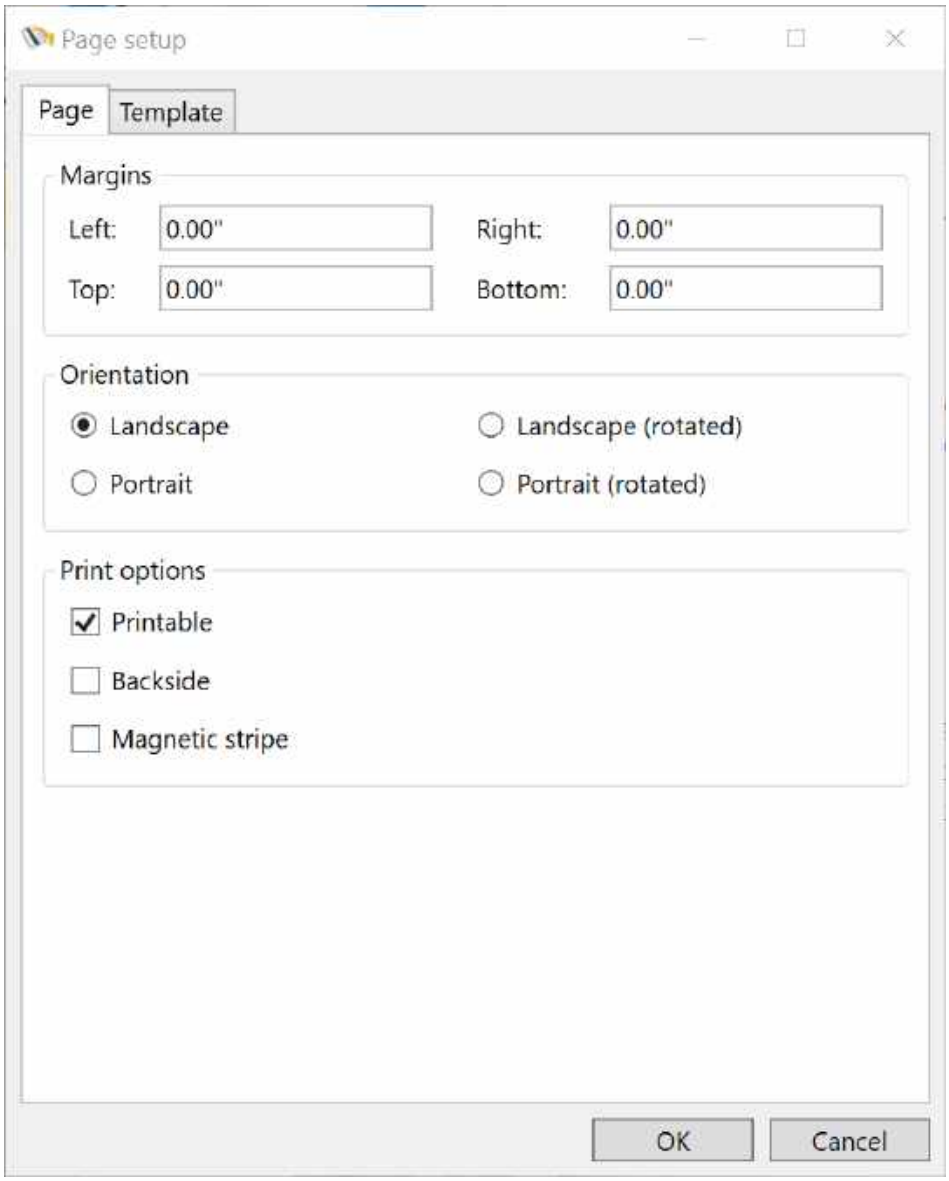

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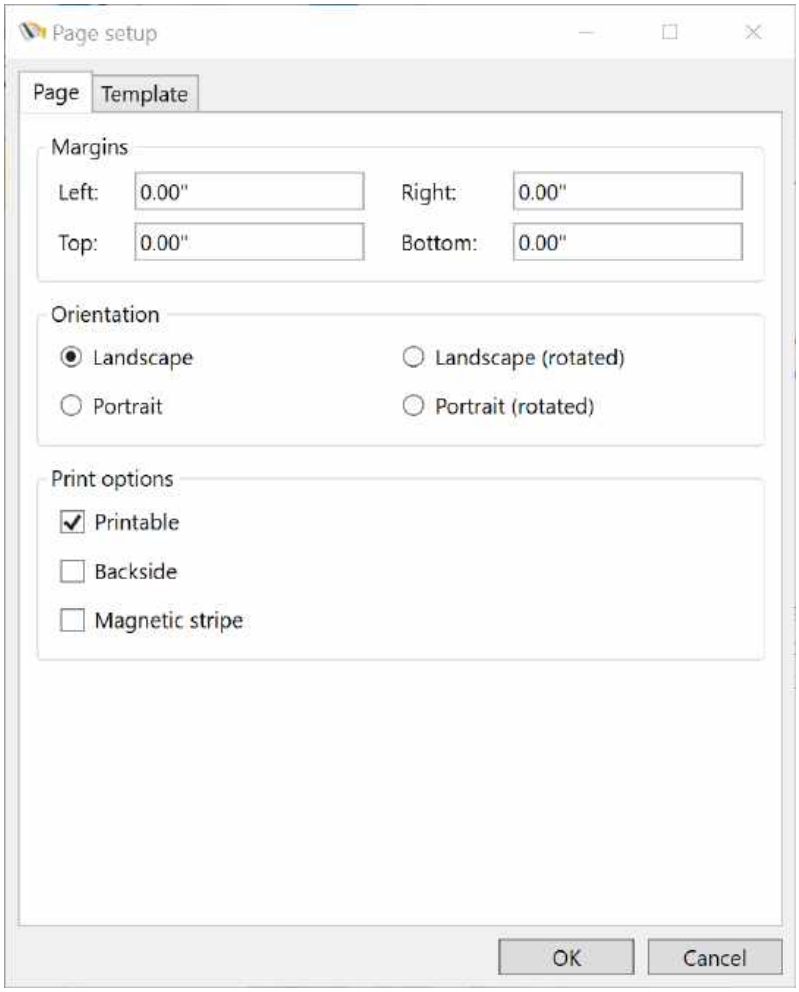
9.3.1 Page



For each selected page in your layout, specific settings can be made. For example, if you are having a double sided print with two pages, the front page can be set to Landscape and the backside can be set to Portrait.

Margins

- Enter the page margins

Orientation

- Change the orientation for landscape or portrait

Print options

- Set the print options for the layout

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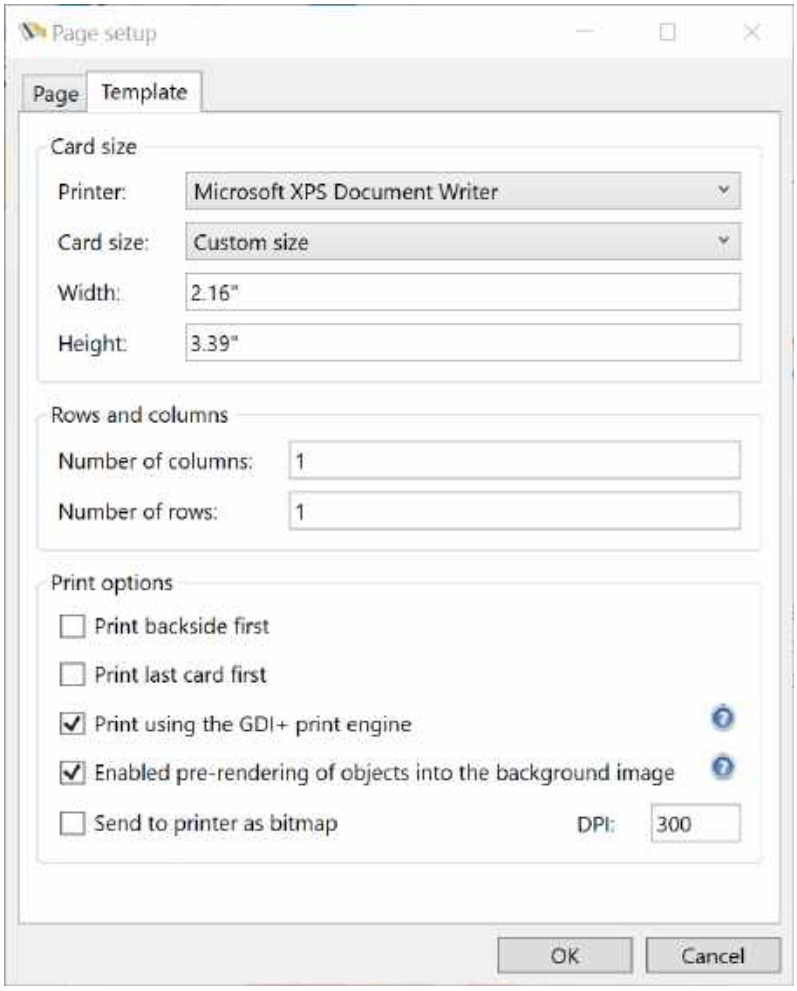
- Select printable for graphical printing the page
- Select or deselect Backside to print or not print the backside
- Select magnetic stripe if magnetic encoding is used

9.3.2 Template



Every Card (Template) designed with CardExchange® Producer can contain multiple layouts and multiple pages. Each Layout 382 and Page 385 can have it specific settings but the template itself holds some specific information like the connected printer being used to print the different pages.

In this section you can define all the specific template settings like selecting the printer being used, card size, etc.;

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Card size

- **Printer** - Select the printer to be used
- **Card size** - Select the specific card size
- **Width, Height** - Enter custom card sizes

Rows and columns

- In this section you can define how many columns and rows need to be printed on one page. If you set the Number of rows to 3, 3 records will be printed on, for example, the front page of the card. This technology can be used to print multiple records for, for example, the use of breakable cards. See more information about how to use Rows and Columns 343.

Print options

- Print backside first - Select this option if the backside of the card needs to be printed first
- Print last card first - Select this option if you want to print the last card from the batch first
- Print using the GDI+ print engine - Select this option for non-compatible XPS printers to ensure highest print quality. For more information CLICK HERE 327.
- Enabled pre-rendering of objects into the background image - For more information CLICK HERE 328.
- Send to printer as bitmap - Select this option if you want to have CardExchange® Producer create a bitmap image first and send it to the printer in stead of sending all objects separately

9.3.2.1 Using GDI+ Printing

CardExchange® Producer is developed using the latest Microsoft technology and uses their XPS printing engine for printing. XPS is the technology that has mostly replaced the printer driver technology as it has been used since the beginning of Windows.

Unfortunately not all ID card printer manufacturers supply drivers that support XPS technology. Therefore CardExchange® Producer also offers a GDI+ print engine.

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When ID card printers do not support XPS printing can this result in bad quality of images and problems with resin printing, to prevent this the GDI+ printing support is enabled as default.

As CardExchange® Producer uses advanced graphical objects that sometimes are not supported by GDI+, you can use this technology in combination with Pre-rendering 328 of objects.

If your printer supports XPS printing then it is recommended to uncheck both the options below:

- "Print using the GDI+ print engine"
- "Enable pre-rendering of background objects"

9.3.2.2 Pre-rendering of Objects

This option enables pre-rendering of objects into the background image of the layout page. When selected, all objects that have been flagged for pre-rendering, together with the background image or brush of the layout page, will be rendered to a bitmap image and sent as such to the printer.

By default, only image objects are flagged for pre-rendering, but on the Visibility 368 tab of the Properties window, pre-rendering can be enabled or disabled for any individual object. Pre-rendering is needed when printing via GDI+ if your design uses graphics that are not supported by the GDI+ print engine.

Pre-rendered objects will always show behind any other objects in the printed result, even if that is not the case on the preview.

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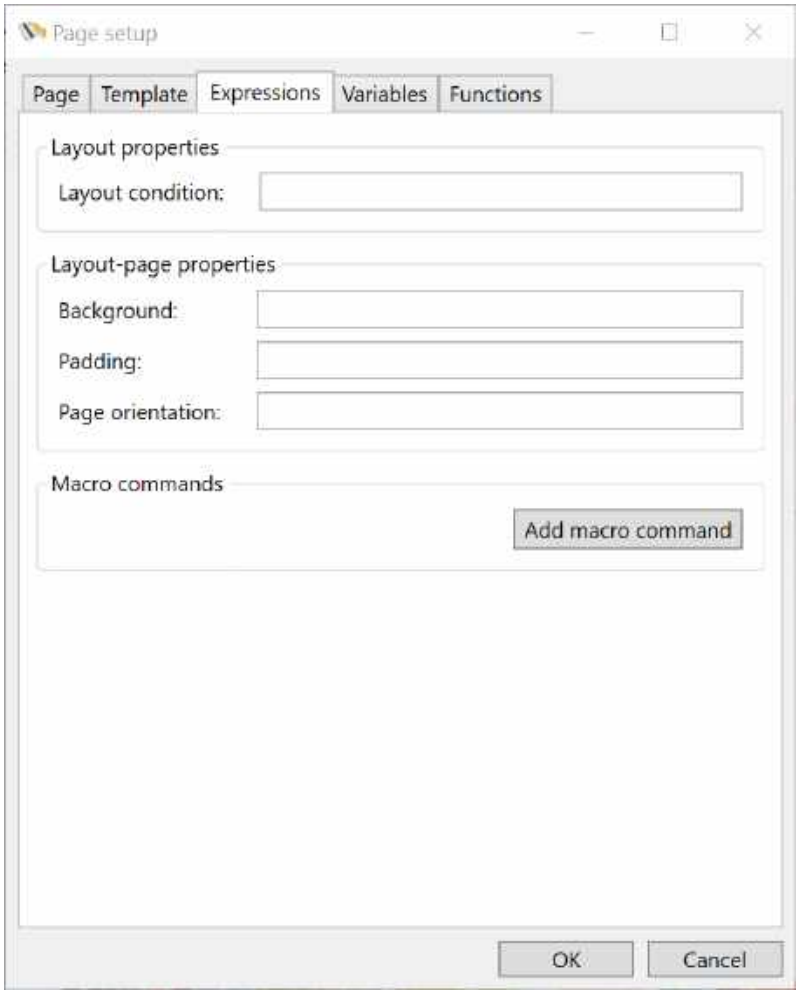
9.3.3 Expressions



The CardExchange® Producer Designer integrates a powerful script language that offers users a high level of flexibility when it comes to personalizing their card layouts. Instead of assigning fixed values to layout or layout-page properties, it is possible to control their values through expressions that yield different results in different circumstances. For example, CardExchange® Producer can inspect a field in the database and then decide to set a different background color, or even show a completely different card layout.

The Expressions tab of the page-setup window allows for specifying expressions for the layout condition, a number of layout-page properties and any number macro commands. **The layout condition is available for the Professional and Ultimate editions.** The layout-page properties and the macro commands are only available in the Ultimate edition.

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Expressions are written in IronPython (see http://ironpython.net), which is the .NET implementation of Python, (see http://www.python.org). Since the documentation of Python is publicly available on these websites, this help file will limit itself to explaining how Python can be used within CardExchange® Producer and giving some practical examples.

Layout condition

When a card template consists of multiple layouts, the layout-condition property can be used to determine whether a layout applies or not. Imagine, for example, that the template has two layouts and that we type

```
layout == 'A'
```

for the layout condition of the first layout. When pressing the Enter or Tab key or clicking OK, CardExchange® Producer will detect that a new variable called 'layout' was introduced and prompt for a default value. You could set the default value to 'A', as shown in the screen shot below.

Now close the page-setup window, select the second layout and open the page-setup window again. Type in the Expressions tab the layout condition

```
layout == 'B'
```

CardExchange® Producer will not prompt for a default value anymore, because the variable 'layout' is already part of the variables collection. Now, when you close the designer, open the mappings window and map the Visible item 'layout' to a field in the database, the first layout will be shown for records that have the value 'A' in that field, while the second layout will only show if that field contains 'B'.

Layout conditions can be controlled by expressions that are much more complex than this. The expressions can contain functions and they can use multiple variables. It is possible to define the layout conditions in such a way, that for some records multiple layouts apply and for others no layout at all. CardExchange® Producer will print multiple cards for the same record if multiple layouts apply. If no layouts apply, CardExchange® Producer will skip the record when executing a print batch.

Background

Three layout-page properties can be controlled by expressions: the background color, the margins and the page orientation. Background colors are specified using HTML color names ('AliceBlue', 'AntiqueWhite', 'Aqua', etcetera) or using HTML color tags, for example,

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'#FFCD853F', specifying the alpha, red, green and blue channels respectively. The simplest way of getting a flexible background color is by just typing a variable name in the expressions box, like

```
backgroundcolor
```

CardExchange® Producer will prompt again for a default value, where you can type, for example, 'AliceBlue'. In the mappings window, the variable name will appear among the visible items and can be mapped to a database column that contains the desired color name for each record.

If the color is determined by a flag that does not reflect the color name directly, it is necessary to define a function in the Functions tab, like for example

```
def getcolor(flag):
    if flag == 'A':
        return 'Red'
    elif flag == 'B':
        return 'Green'
    else:
        return 'Blue'
```

This function can be used in the expression for the background color by typing

```
getcolor(flag)
```

where the variable 'flag' should be mapped to a database column that can contain the values 'A' or 'B'. As a result, CardExchange will show a red or green background if that column contains the value 'A' or 'B' respectively. he background will be blue for all other values.

Padding

The padding is the space between the edge of the card and the printed area, more commonly designated as margin when talking about pages. It is not commonly controlled by expressions. The result of the expressions should be either an integer value that specifies the width of the margin in pixels, or a string containing two or four numbers, optionally separated by a comma. The string '10 20' or '10,20' would set a margin of 10 pixels on the left and right sides and a margin of 20 pixels to the top and bottom sides. The string '1 2 3

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4' or '1,2,3,4' would set a left margin of 1, a top margin of 2, a right margin of 3 and a bottom margin of 4.

Page orientation

For the page orientation, it is still more unlikely that you want to control it with an expression. The value that the expression should return are 'Landscape', 'Portrait', 'ReverseLandscape' or 'ReversePortrait', where the last two refer to an orientation that has been rotated 180 degrees.

Macro commands

Macro commands are text strings that are sent to the printer as printable characters, but that are interpreted by the printer as special commands. The most common application of macro commands is using them for magnetic encoding. The printer recognizes text strings as macro commands by inspecting the first and sometimes the last characters. For example, on certain printer brands, the string '~1%XXXXX?' is interpreted as a command to encode the characters 'XXXXX' on track 1 of the magnetic stripe.

Although you could define macro commands for magnetic encoding in the Expressions tab of the page-setup window, you normally will not do that, because it is much more user friendly to enable the magnetic-stripe object in the Page-layout ribbon and configure it in the properties window. However, some printers support other types of macro commands, for example for defining holographic overlays, in which case you can manually add those commands in the page-setup window.

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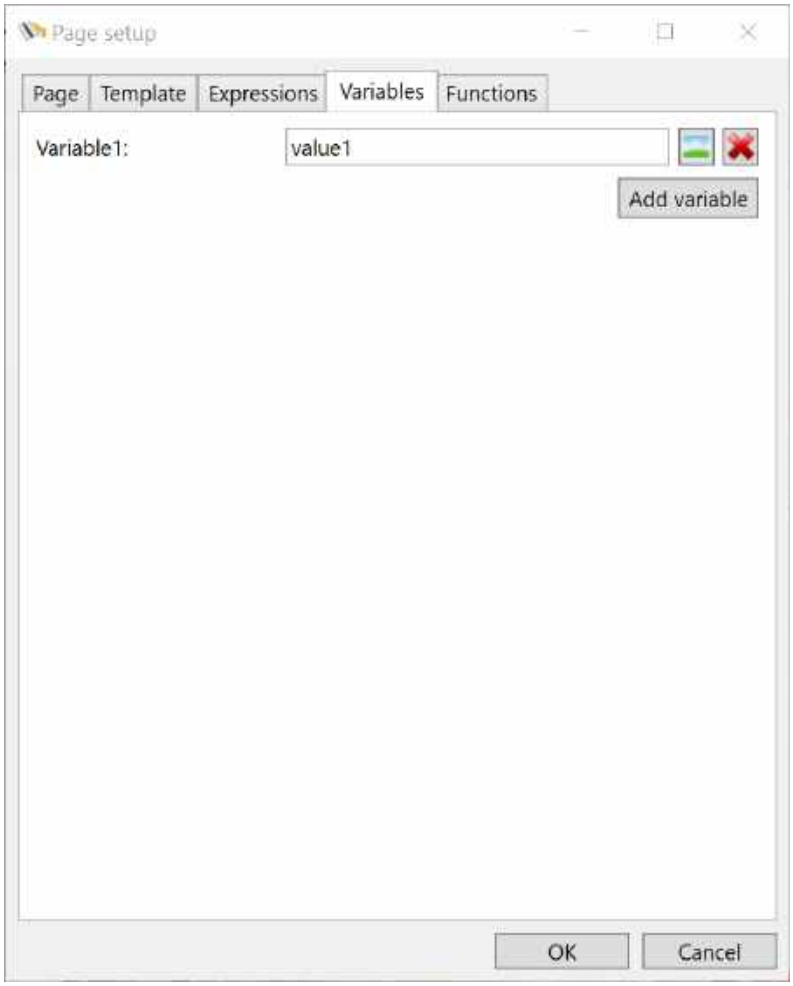
9.3.4 Variables



When expressions are used to determine property values, CardExchange® Producer detects whether any variables were used in the expression. If so, it prompts for default values and adds the variables to the template's variable collection. If you select the Data tab of the Explorer Menu, the template's variables will appear and their values can be mapped to external data, like database columns or manual entries.

The Variables tab in the page-setup window, lists the complete variable collection and allows for following actions:

- Changing a variable name by clicking on it in the list and typing a new name. If you rename a variable, be sure that you also adapt any expressions that are using that variable.

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- Changing the default value of a variable by typing in the value box.
- Removing a variable by clicking on the button with the red cross. You should only do this if you are sure that the variable is not being used by any expressions.
- Adding a new variable by clicking on the Add-variable button.

If you want the default value of a variable to represent an image, you can click in the image button to show some additional controls that helps you defining the image.

The select-image button allows you to select an image file from the computer. The point-to-file check box allows you to set the default value to the file path instead of the image data.

When you hover over the image, you see two additional buttons that are for editing and removing the image respectively. Please, note that edited images cannot be of the point-to-file type. When you edit a point-to-file image, the point-to-file box will be unchecked automatically. On the other hand, if you check the box for an edited image, the image will revert to the original one.

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9.3.5 Functions

The Functions tab in the expressions window shows a single text box where you can type any global definitions you want to use in your Python scripts. When typing here, you need to follow the Python syntax (see http://www.python.org). Normally, you will use this space to define custom functions to be used in expressions. An example shown before was the function we defined to determine the background color

```
def getcolor(flag):
if flag == 'A':
return 'Red'
elif flag == 'B':
return 'Green'
else:
return 'Blue'
```

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It is also possible to define global variables, that is, variables that can be used in expressions or functions, but that will not be listed under the visible items. For example, we could change the above function definition to

```
colorA = 'Red'
colorB = 'Green'
colorC = 'Blue'

def getcolor(flag):
    if flag == 'A':
        return colorA
    elif flag == 'B':
        return colorB
    else:
        return colorC
```

To get a taste of the level of complexity you can achieve with custom functions, see the below definition of a function that converts a string to name casing. It uses the regular-expressions module of Python (see http://www.python.org for more information).

```
import re

def namecase(s):
    return re.sub('\w+', capitalizematch, s)

def capitalizematch(m):
    return capitalize(m.group(0))

def capitalize(s):
    if len(s) > 1:
        return s[:1].upper() + s[1:].lower()
    elif len(s) == 1:
        return s.upper()
    else:
        return s
```

With the name-case function, you can convert a string like 'jOHn SMith' into 'John Smith'.

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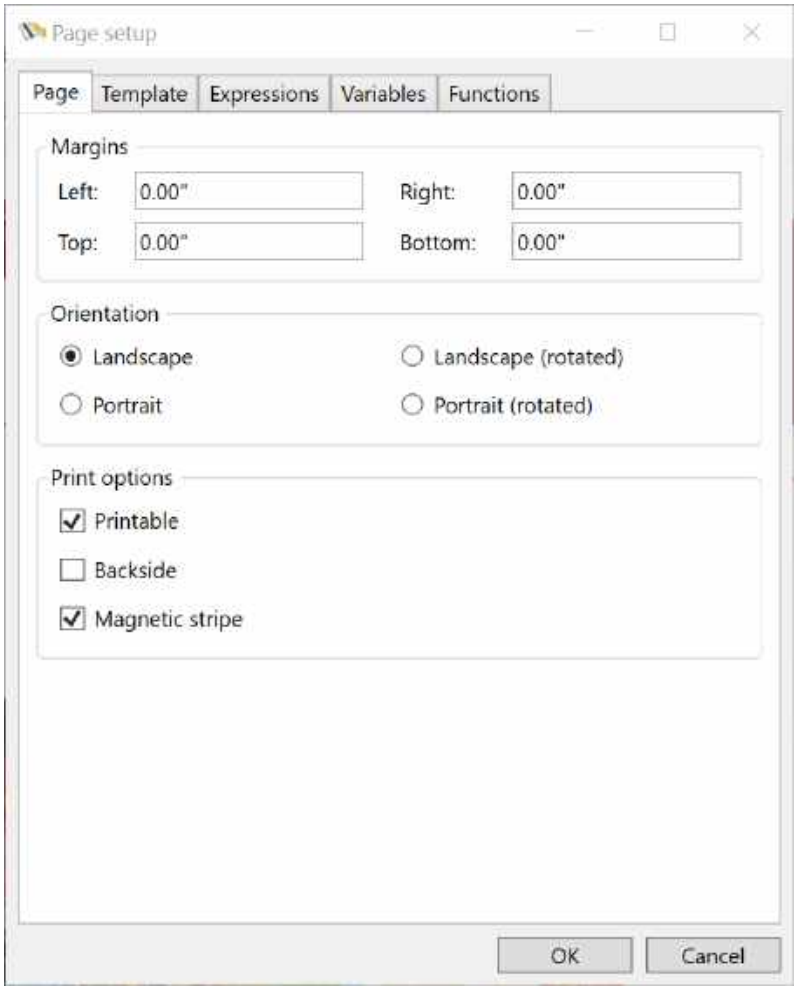
9.4 Magnetic Encoding

Magnetic encoding with CardExchange® Producer is very easy to configure. Just check the **Magnetic stripe** check box in the Page layout tab or select Page Setup from the Menu.



Select the Page tab and check the Magnetic stripe check box.

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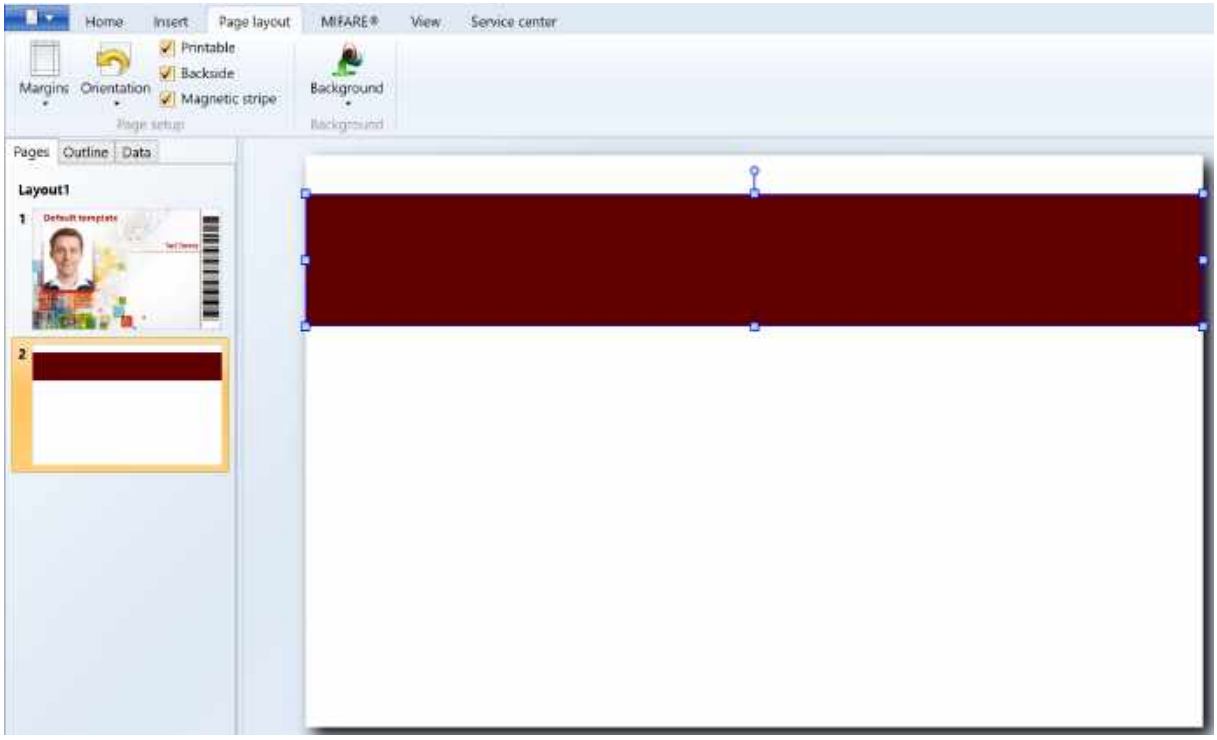

In the Page design you now see a red magnetic stripe rectangle appearing as indicated. Now make sure that you have the Properties 347 window open and make sure the Content 349 tab is selected and that the magnetic area on your page design is selected.

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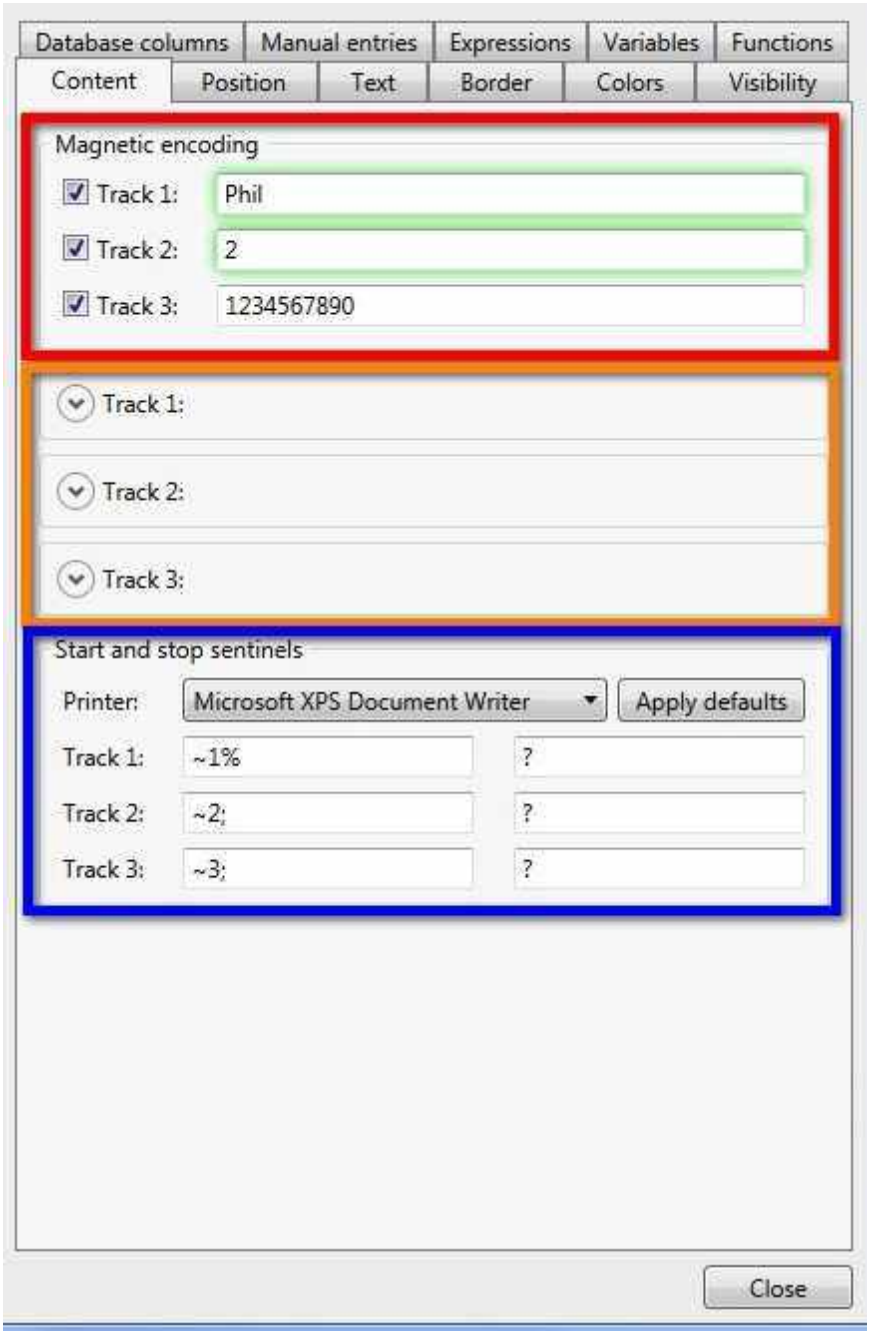

In the Properties window you now see three sections:

- Magnetic encoding
- Track 1, Track 2, and Track 3
- Start and stop sentinels

Magnetic encoding

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In this group, indicated with the **red** rectangle, you select which track you want to write to. Just select the check box for each track to make it available. In the text box next to the Track you can directly enter information (fixed value) or drag a database column into it. For each selected track the track object, indicated in the **orange** rectangle, will become available.

Track 1, Track 2, and Track 3

In this group, indicated with the **orange** rectangle you can set or change the information that is being coded to the magnetic stripe. Click on the to expand the Track info.

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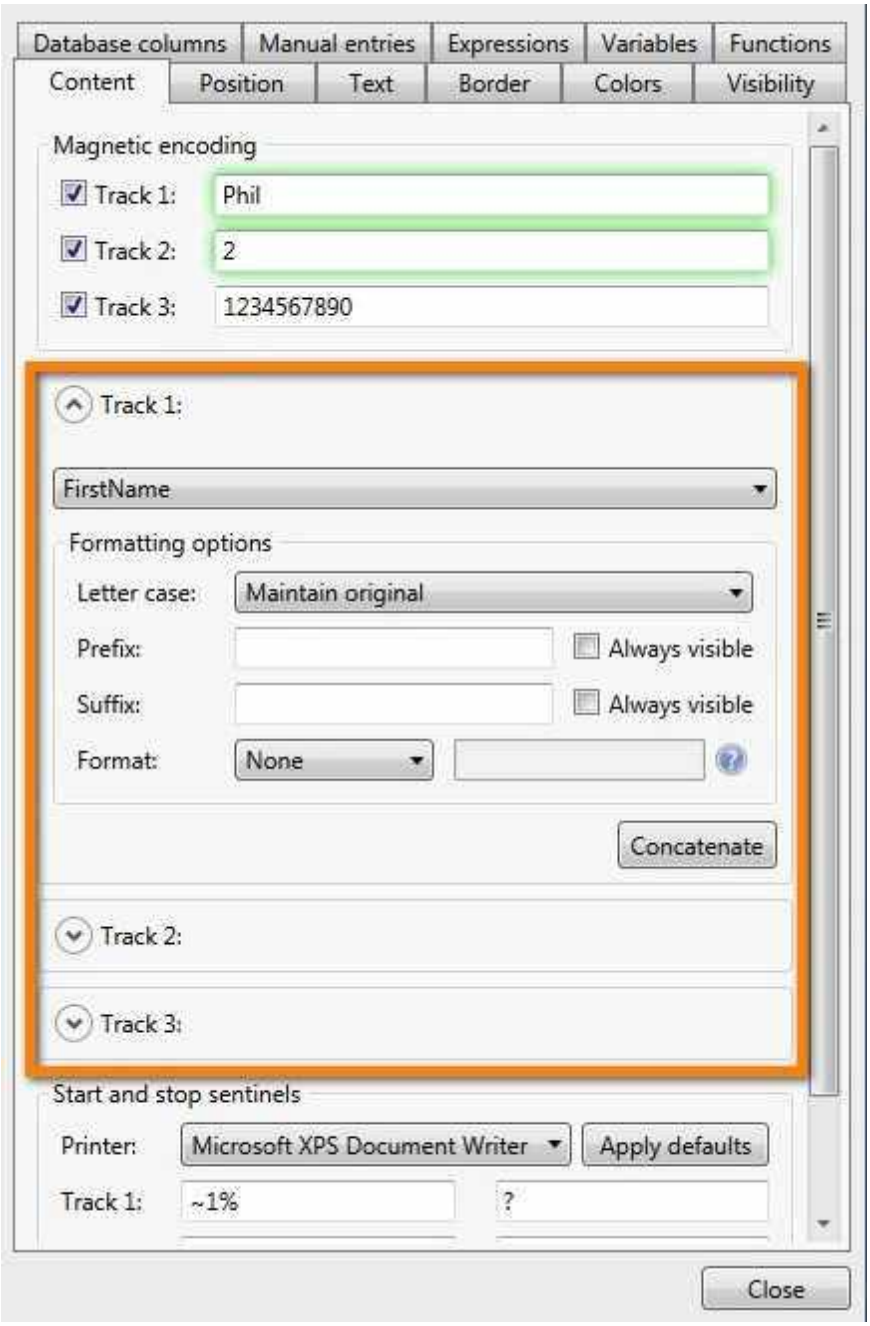

Just like with normal objects, with the Magnetic Encoding you can also use the Standard Object Types 403 to connect.

Start and stop sentinels

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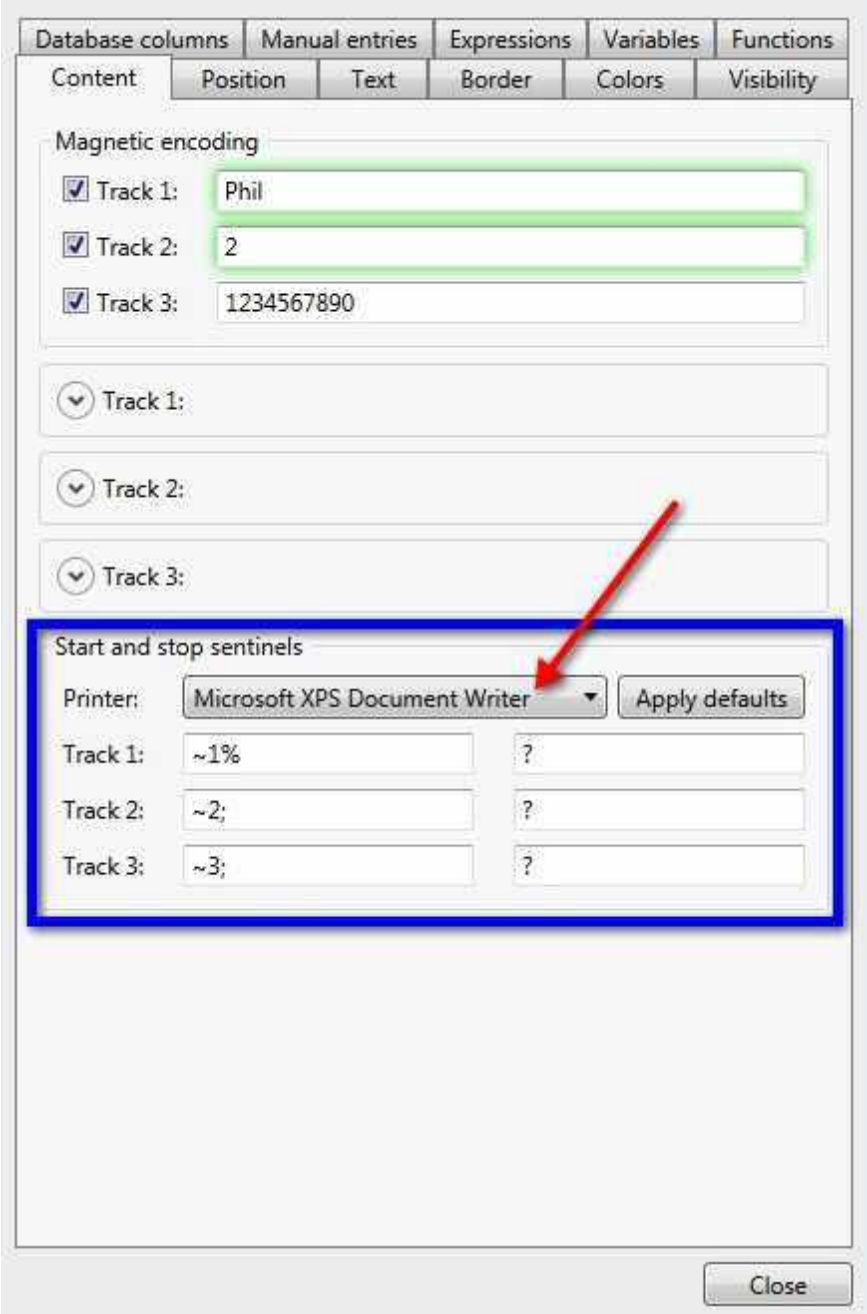

All ID Card Printers are using start and stop sentinels for moving the card into encoding position. Although encoding of magnetic cards is based on an ISO standard, the commands used are mostly different per manufacturers brand.

To make sure you are using the correct start and stop commands, the most common commands are available via CardExchange® Producer directly. Just select the printer you are using from the printer drop down menu and click on Apply defaults.

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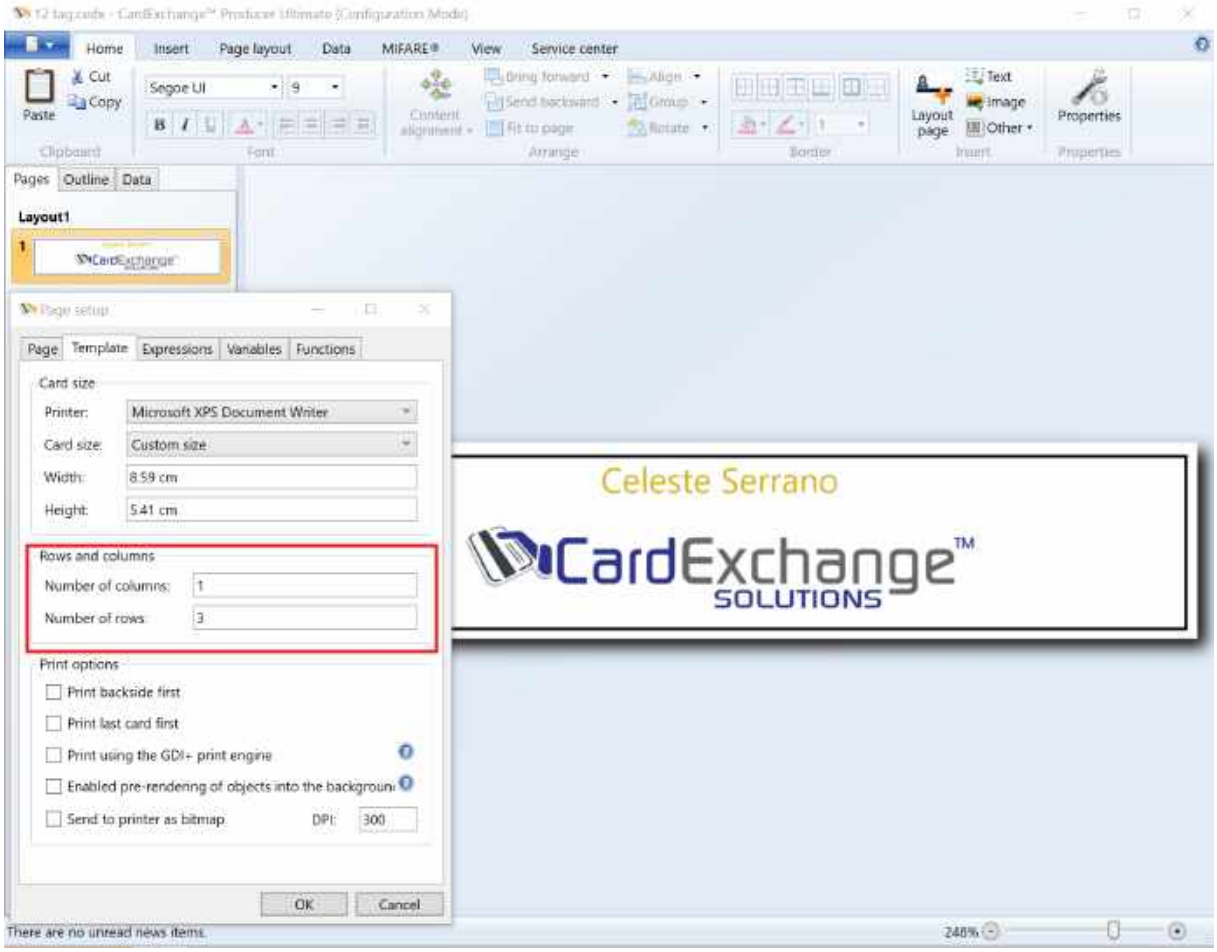
If you are using specific start and stop sentinels, you can directly enter them into the text boxes.

9.5 Rows and Columns



CardExchange® Producer offers the possibility to print multiple records on a your card. This can be very handy when printing, for example, breakable cards for key chains.

Select the Layout 381, open the Page Setup 323 window, and select the Template tab. Here you can find the Rows and Columns section. Enter the amount of columns and rows you want to use. For example, using one column and 3 rows will have the following print result:

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Of course, because CardExchange® Producer supports Windows printers, you can also use this to create face books for your A4 or Letter printers.

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9.6 Templates

As you have read in the Designer Interface 314 section of this Help file, all your configuration is done in the Card Designer. Therefore the CardExchange® Producer Designer works based on templates.

To understand how CardExchange® Producer works, it is important to take special note of this section of the Help file.

Basically every time you create a new card with CardExchange® Producer you are creating a new Template.

With the Designer you always create a new or open the selected **Template**. But it is always ONE **Template**!

Each **Template** has always one ID Card Printer connected, one Database connection, one MIFARE® Classic or DESFire connection, one External Plug In, etc.

Each **Template** can have have Multiple Layouts. In the screen shot you see "Layout1" and "Layout2". These are the layouts inside the template. Each layout can have it's own unique conditions like Magnetic Encoding 337 settings. By selecting the layout, you can simply call the Page Setup 323 window from the Main Menu 346 to set the specific conditions.

This offers very powerful functionality. Using Multiple Layouts inside one Template makes if for example, possible to automatic switch between the different available Layouts within the Template. More information how to create this type of functionality can be found in the Expressions 329 section of this Help file.

More information about Layouts can be found in the "Adding Layout(s) 382" section of this Help file.

Each Layout can have Multiple Pages. You can have a Page for the Front Side, a Page for the Back Side, but also a Page for a UV panel on the Front and/or a UV panel on the Back. Each Page holds all the objects like text, image, barcode, etc., objects.

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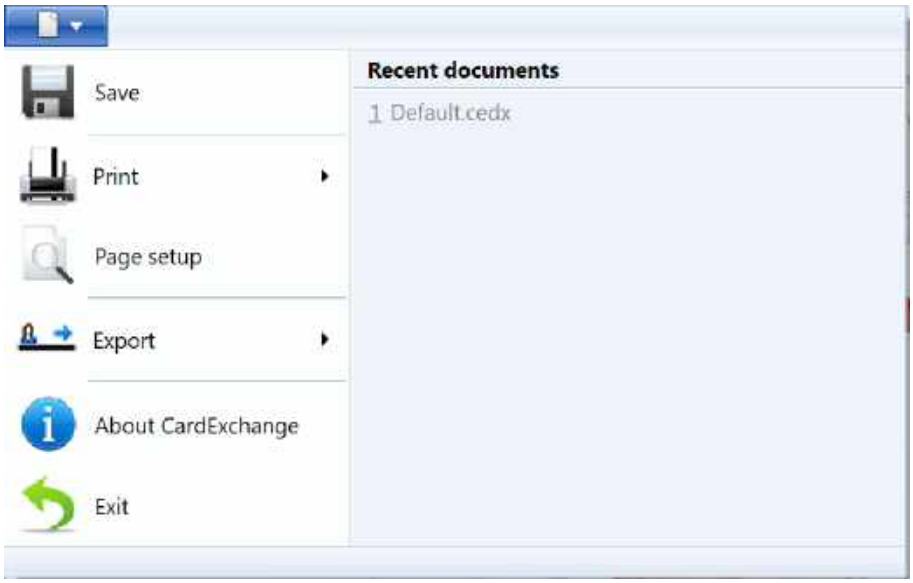
9.7 Menu Overview

In the Main menu of the Designer you can find all common functionality needed to save, print, etc., your card.



In the Designer menu you can load the page setup, print the template, and save the template.

Available functionality

- **Save** — Save the template and/or the modifications you made
- **Print** — This menu has three sub items:
  - **Print** (Select the printer, the amount of copies, etc.)
  - **Quick Print** (Send the template directly to the default printer without making any changes)
  - **Print preview** (Preview and make changes to pages before printing)
- **Page setup** — Opens the Page Setup window. More information about Page Setup can be found in the "Page Setup 323" section of this Help file
- **Export** — This menu has five sub items and allows you to export the card layout as an image. You can export different formats like BMP, JPG, PNG, etc.
- **About CardExchange® Producer** — This opens the about window with version information of CardExchange® Producer

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- **Exit** This will exit the Card Designer and close the Configuration mode

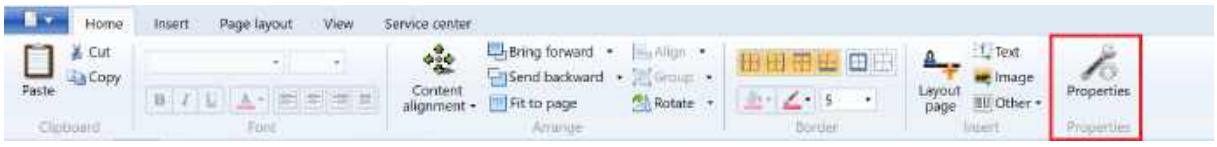
9.8 Variables

The variables in the CardExchange® Producer designer can be used as input for Python scripts and their value can be mapped to for example a database column or a manual entry. Mappings are made via the Content 349 tab in the Properties 347 window.

Please visit the Variables 378 section of this Help file for more information about using Variables.

Variables are available in the Ultimate edition.

9.9 Properties



All objects used with the CardExchange® Producer Designer have way more properties as shown in the Add Object window. All these properties are available in the Properties Windows. Click on the Properties button in the Home tab to open. In the Properties Window you can find specific properties for:

- *Content* 349

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- Position 353
- Text 354
- Border 357
- Colors 361
- Visibility 368
- Database Columns 372
- Manual Entries 374
- Expressions 329
- Variables 333
- Functions 335

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9.9.1 Content

In the content tab you can enter information when you are using a Fixed Value 407 object. This information will then be presented on the Page design in the Text 387 object. Of course when connected to a database, this Content tab will show the data from the connected column. The box around the text area will be **GREEN** when it contains information coming from a connected database, **ORANGE** when it contains Manual Entry information, and **RED** when it contains information from Scripts. When using fixed text, it will have no color and look like the screen shot.

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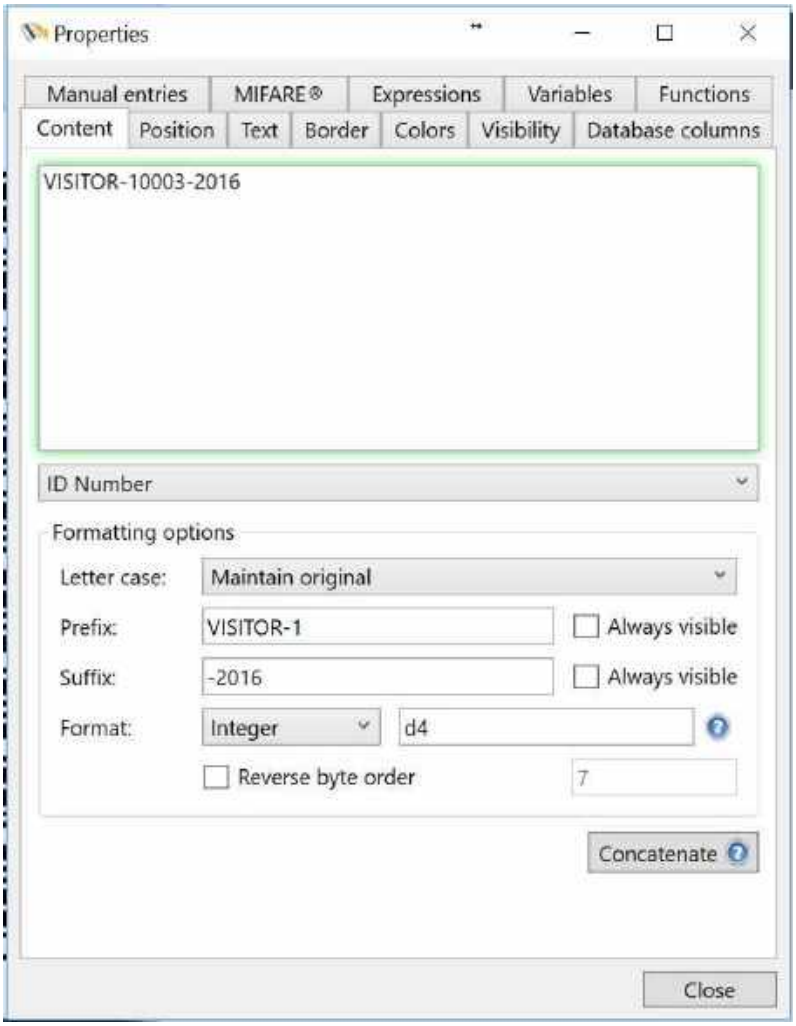
You can change the information by selecting a different Standard Object Type 403. But can also be set for using photos, signatures, etc. More information can be found in the "Using Images 388" section of this Help file.

In stead of selecting a Standard Object, the information can also simply be changed by selecting a database column from the Data Menu 317 in the Explorer Menu 316 and drag and drop this field directly into the Content text area.

Formatting Options



The Content tab also offers the possibility to do some advanced formatting. In the Formatting Options group you can set the Letter case for the content. You have four options for the Letter case:

- **Maintain Original** - No changes to the original
- **Lowercase** - Makes the content Lowercase

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- **Uppercase** - Makes the content Uppercase
- **Namecase** - Makes all the first letters Uppercase

You can add a prefix and a suffix to your content and make it always visible. By default it is unchecked which means that if there is no content available, for example from the database, the prefix or suffix information will not shown.

You can also set the Format of the content. This can be handy if you want to make sure that it is always a integer, date, text, etc., content. You can select the following Formats:

- **Date/Time**
- **Decimal**
- **Floating Point**
- **Integer**
- **None**
- **String**

You can also format the content based on kinda script. For example in the screen shot we entered '**d4**'. That means that the content will be representing four digits. So if the value from the database is 1, setting it to **d4** will show **0001**.

No bringing it all together, the screen shot with the specific settings will represent the follow information on the card to be printed:

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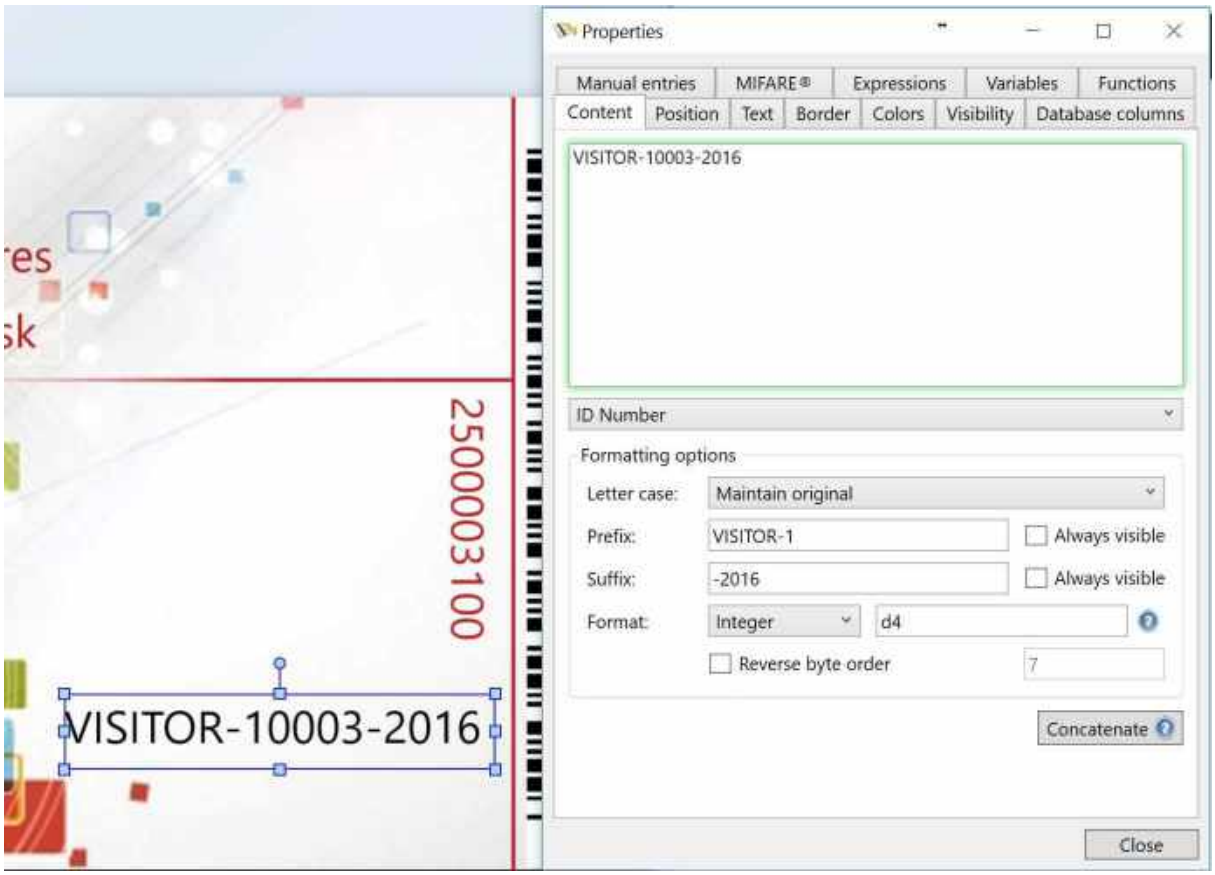

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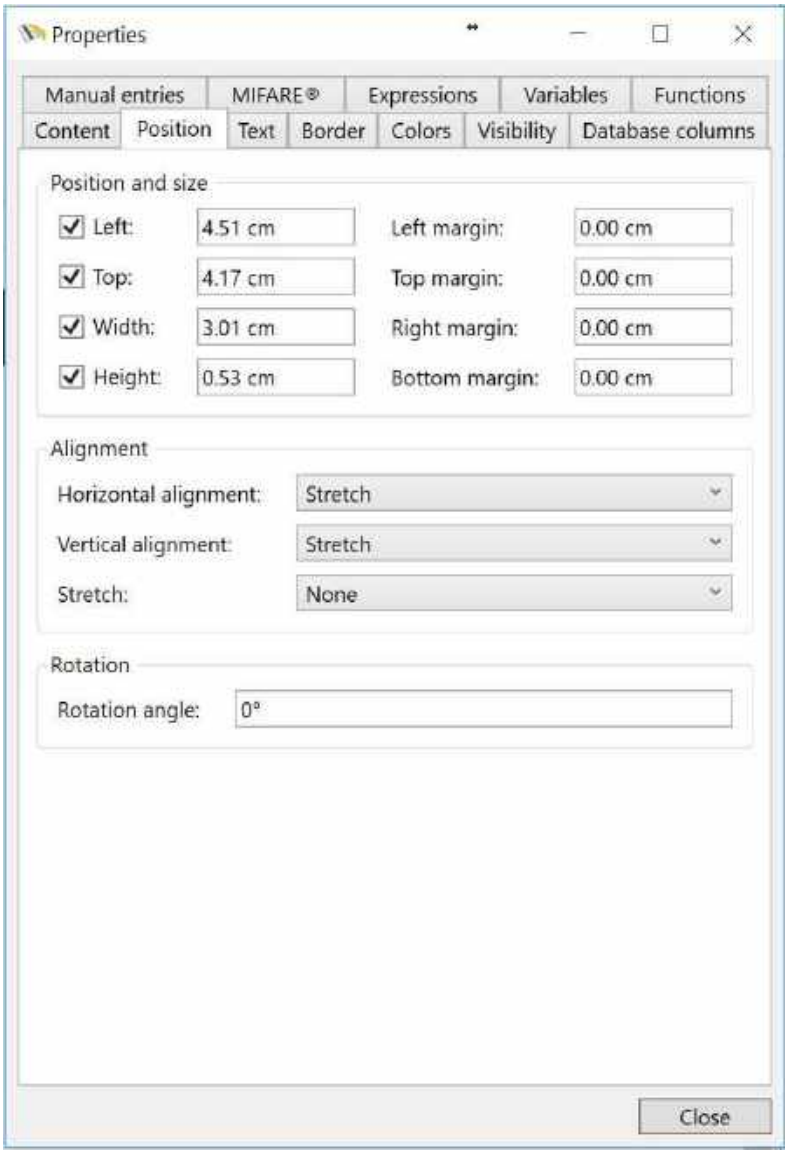
9.9.2 Position



In the Position tab you can set the specific position, sizes, and margins. Of course you this reflects the position on the Page as you dragged and dropped it so what is the need. In some situations you will have to set the positions, sizes, and margins based on specs provided by the customers. In stead of trying to accomplish this with a very stable hand, you can here directly enter the values.

Also the Horizontal and Vertical alignment can be set. Set the preferred stretch setting and, if applicable, enter the rotation angle in degrees.

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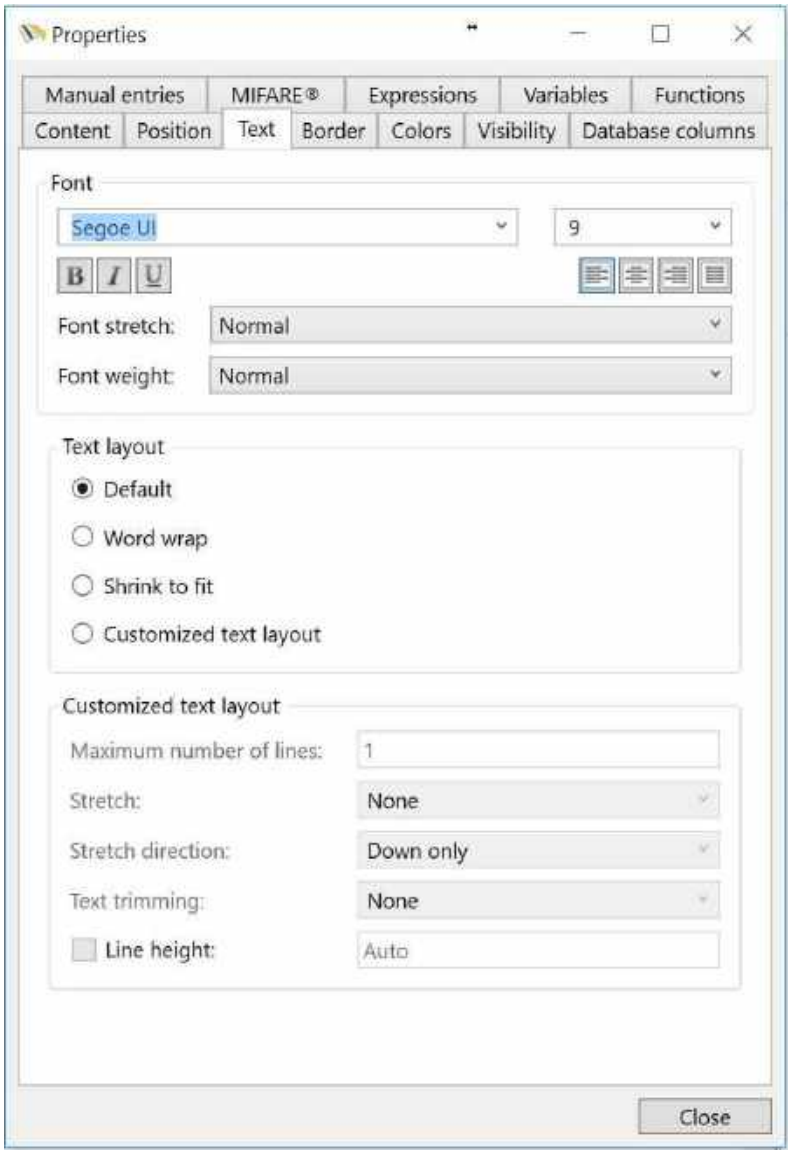
9.9.3 Text



In the Text tab you can set the Font Type and the Font Size in the Font Group. Besides the alignment options, you can set the Font Stretch. The Font Stretch is not the same as the text stretch because it determines the intense of the font when stretching while the standard stretch just make sure the text fits in the text box. With the Font Stretch you can choose from:

- **Normal** *(Default)*
- **Ultra Condensed**
- **Extra Condensed**
- **Condensed**

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- **Semi Condensed**
- **Semi Expand**
- **Expand**
- **Extra Expand**
- **Ultra Expand**

In the Text Layout you can set the Maximum number of lines for the text object. That means if you set, for example, the value to 2, it does not matter how large the text object on the page is, it will only use maximum two lines for the text. If you do not use stretch functionality, it will not fit the box if it over exceeds 2 lines.

Bringing it to the Stretch option. Stretching and Stretch Direction combines the perfect functionality to get good results in your text object on the Page. In the Stretch Drop Down Menu you can select:

- **None** (*default*)
- **Fill**
- **Uniform**
- **Uniform Fill**

In the Stretch Direction you can select:

- **Up Only**
- **Down Only**
- **Both**

Now, for example, when selecting the option **Fill** in the Stretch Drop Down Menu, in combination with the **Down Only** option from the Stretch Direction Menu, the **Font** will be re-sized horizontally only.

Text Object without Stretch

Text Object with Stretch set to Fill, Stretch Direction to Down Only

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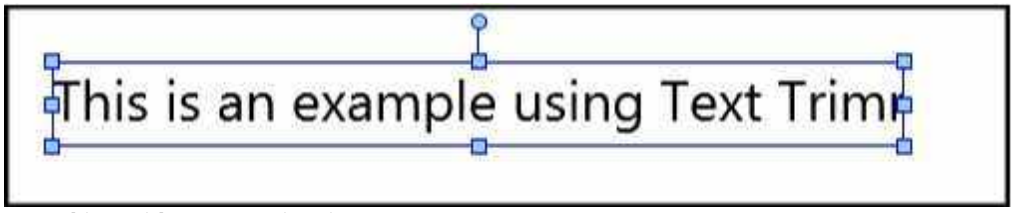
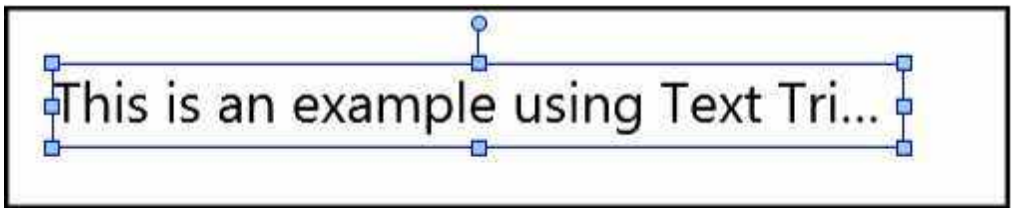
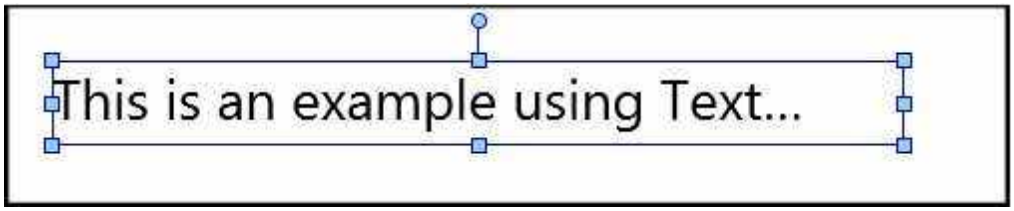
In stead of using Stretch functionality, you can also trim the text. There are basically three options for text trimming:



Text Object without Text Trimming

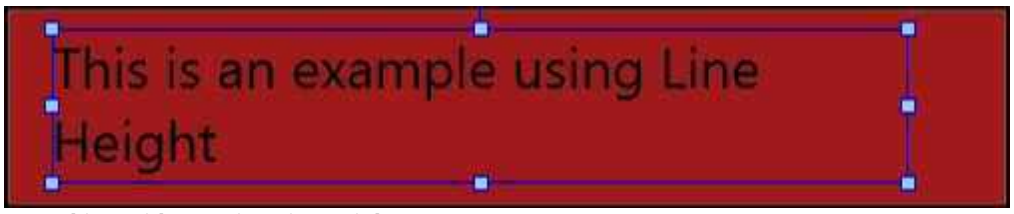


Text Object with Character Ellipsis Text Trimming

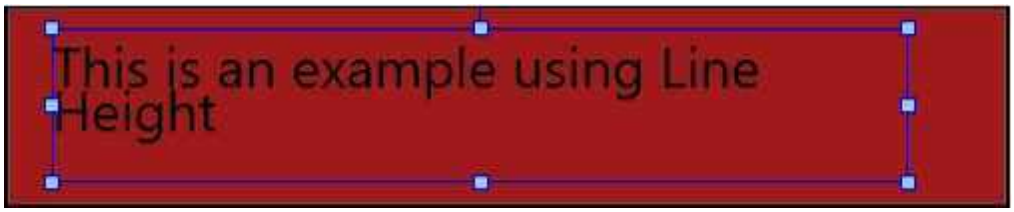


Text Object without Text Trimming

Last option in this Text property is setting the Line Height. By default this is not disabled and it uses the standard line heights for the Font Type. In some situations it can be that the standard will eat up to much space you have available on Page Design. When you select the check box, the text box right next to it becomes available and you can enter a value for the line height. The value used is depending on the settings you made in the Options section in the View 321 tab, centimeters, inches, or pixels. See example below:



Text Object without using Line Height



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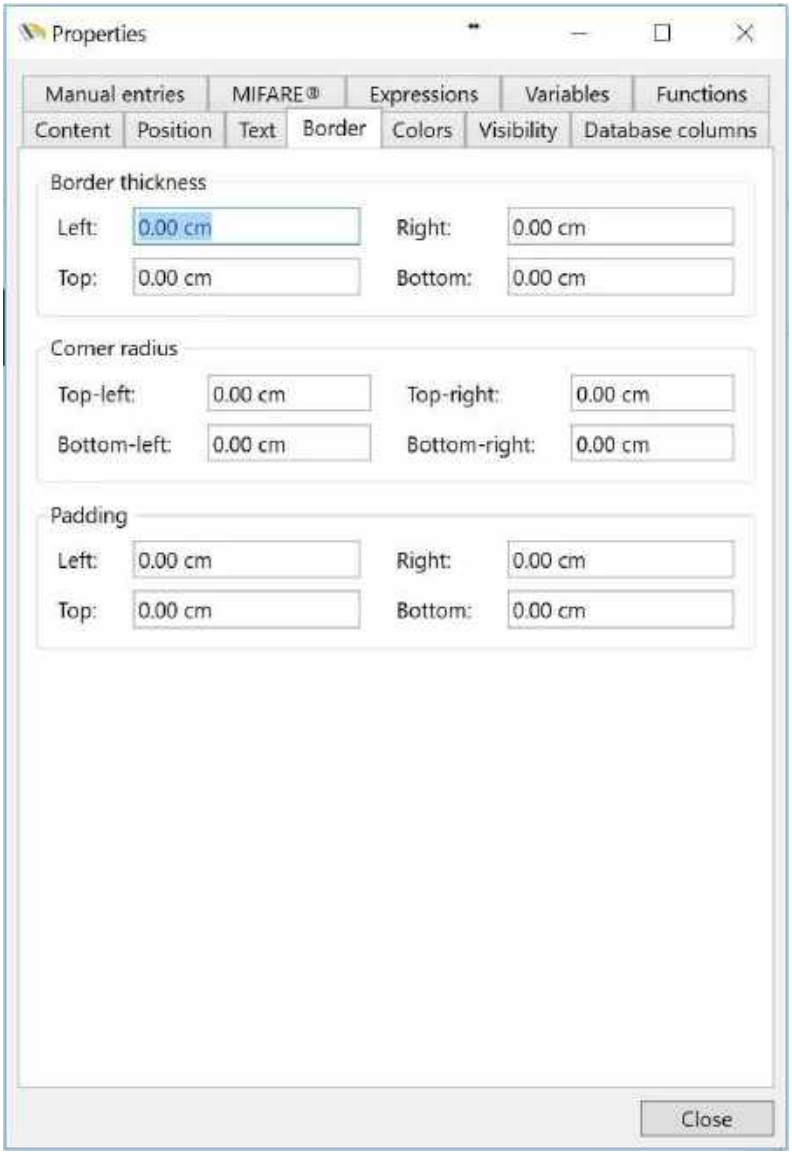
Text Object using 0.10" Line Height

9.9.4 Border



In this section of the Properties Window you can set the properties for the borders of the objects. In the first group you can define all the values for the Border thickness. For example, when adding a rectangle object to your Page Design, you can select the border thickness from the Home menu in the Border section:

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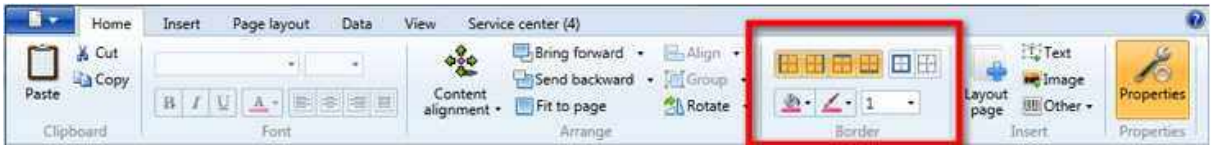

You can also enter this directly in the Border Thickness section of the Border tab. This is handy if you need to set specific values provided by your customer.

For example, we add a photo object on the Page Design and set the values for entering to pixels in the Options section of the View tab. This object looks like below:

Now we set the Border Thickness to 5 pixels for the Right and Bottom:

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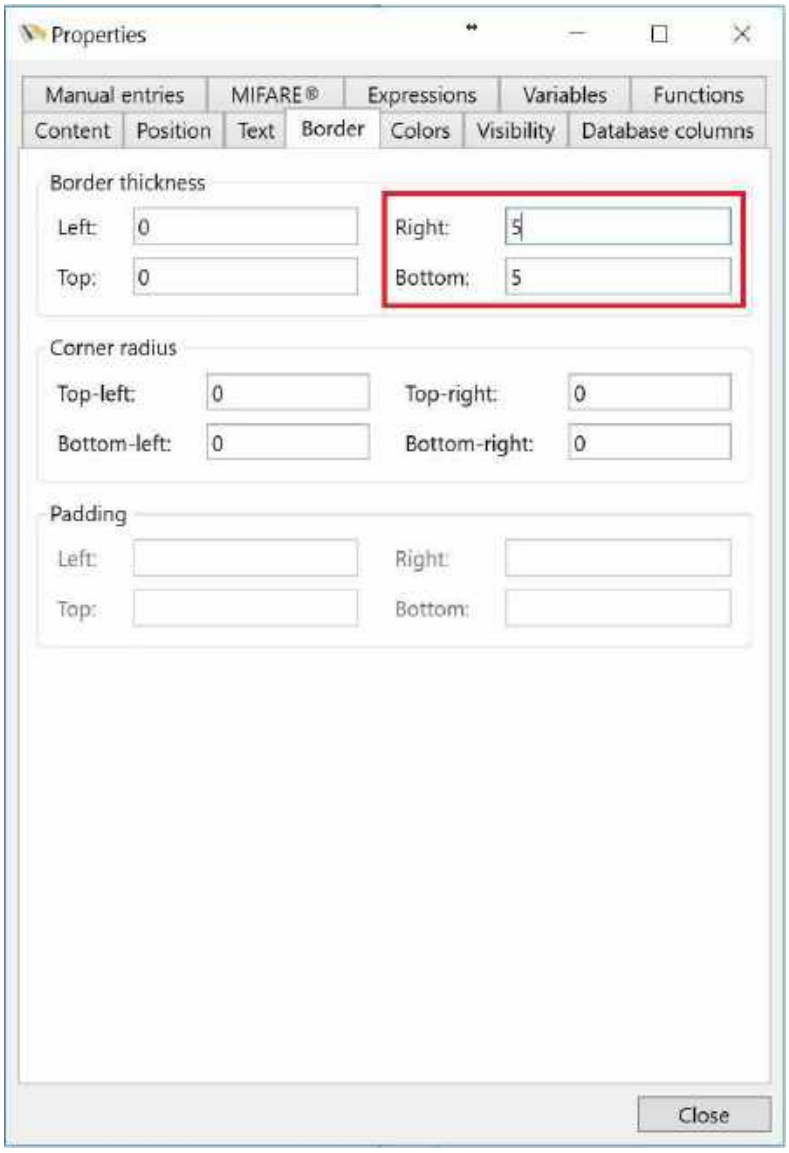

Now the photo object will look as below

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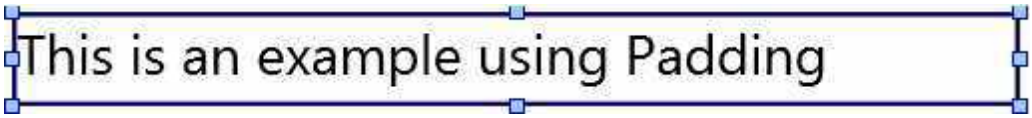
Now you get totally fancy by combining this with the Corner Radius. For example, we set the Corner Radius for the Top-Left and the Bottom-Right to 25 pixels and see the result below:

This can be done with all existing objects available with CardExchange® Producer. It even can become more advanced if we are combining the objects borders with colors and backgrounds. More about this in the Colors 361 section of this Help file.

Last but not least, when using Text Objects you can use padding. Padding is the space inside the object and is therefore not the same as Margin as that is the space outside of the object.



Text Object without Padding

Text Object with Left and Top Padding

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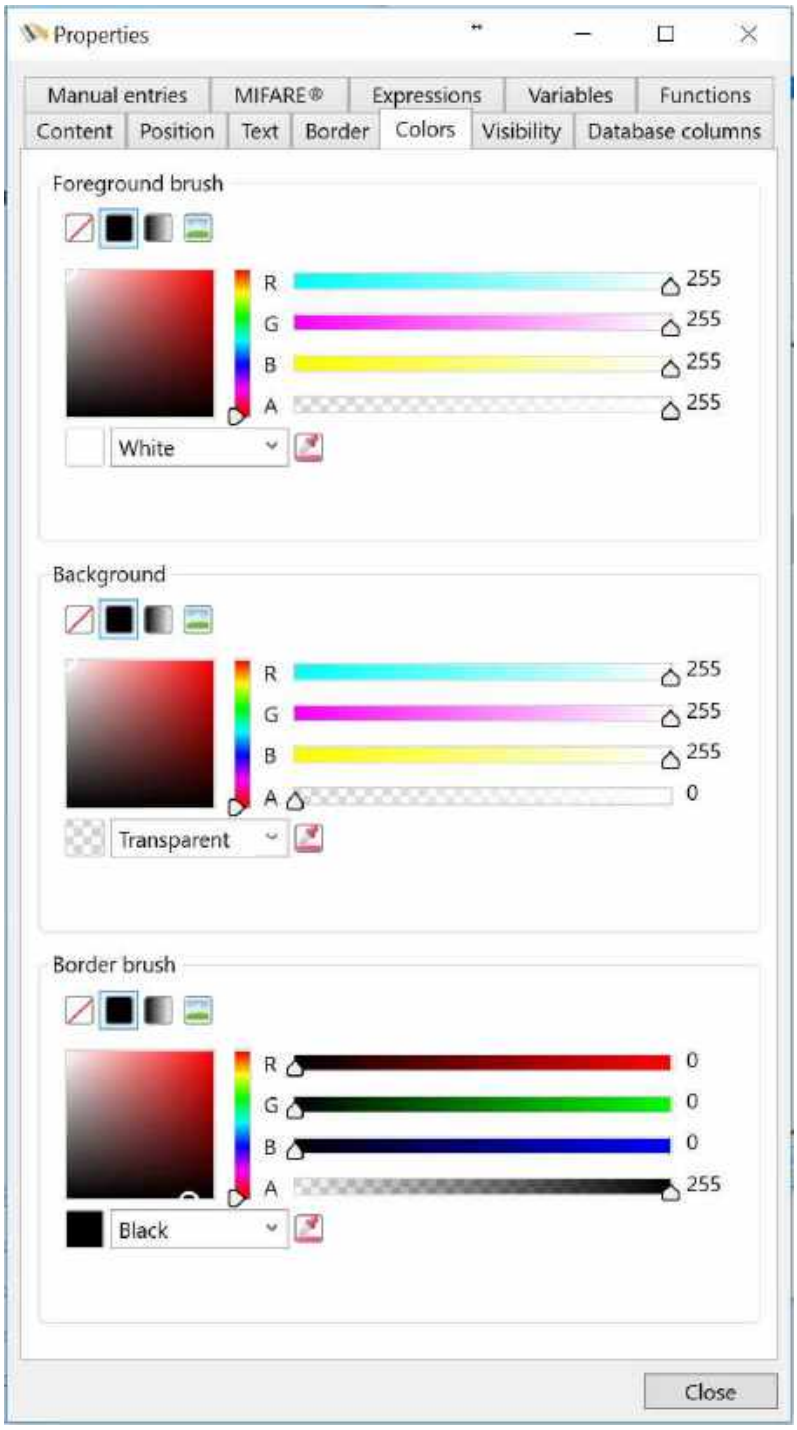
9.9.5 Colors



Depending on the object used on the Page 325 design, different color options are available divided in three different groups:

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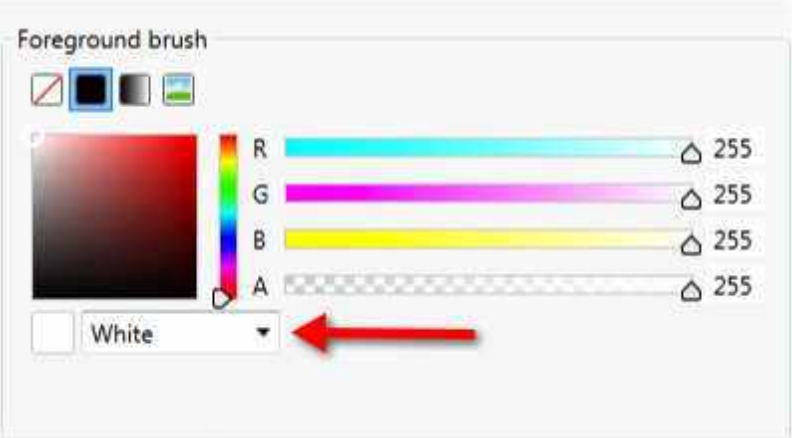
- **Foreground brush** - sets the foreground color of the object
- **Background** - sets the background color for the object
- **Border brush** - sets the border color for the object

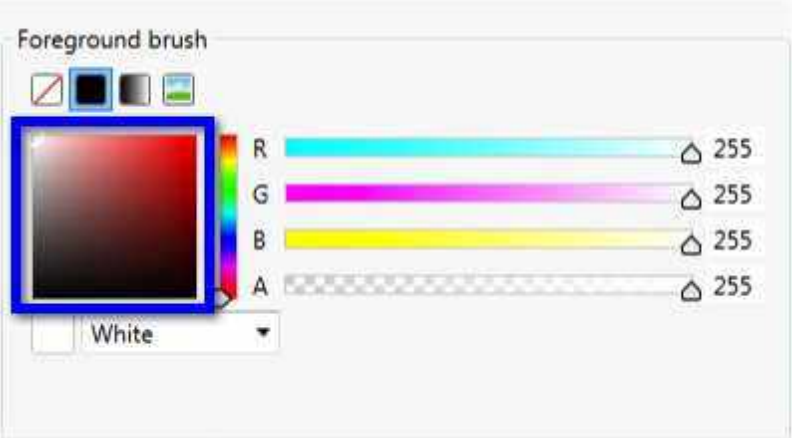
Each group offers four different style options:

- **Transparent**
- **Solid color**
- **Gradient**
- **Image**

Colors can be selected directly from the drop down menu as indicated with the **red arrow**:



Picked from the color selection area as indicated with the blue rectangle:



Created by moving the color sliders to the preferred position as indicated with the orange rectangle:

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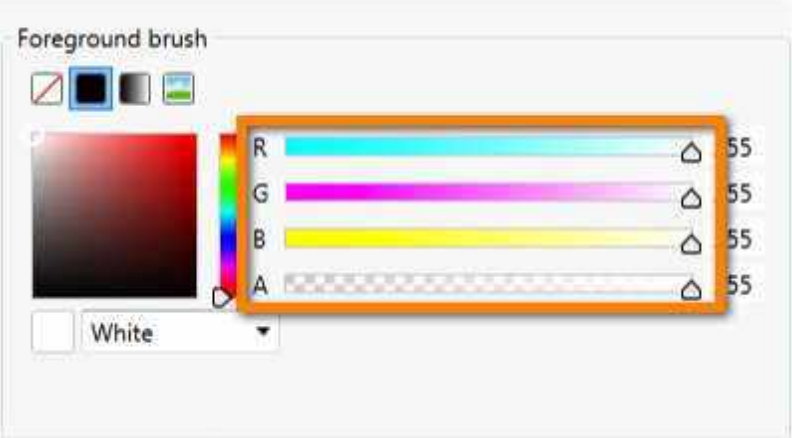
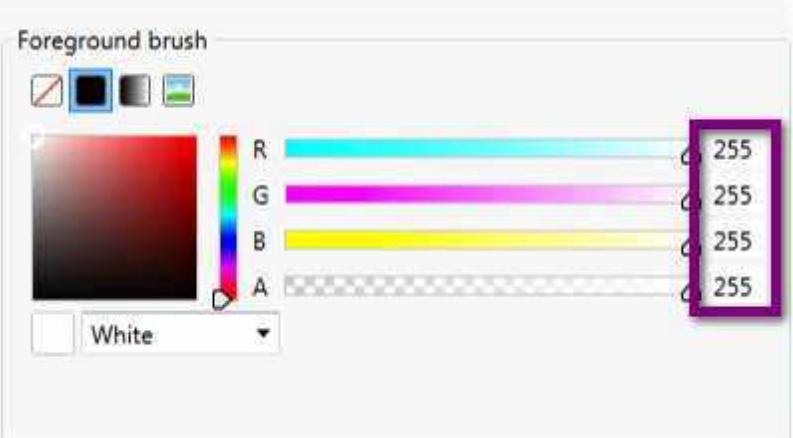


Or directly entered into the text boxes right from the color sliders as indicated with the purple rectangle:



There are so many possibilities to combine that it is impossible to explain them all. We have created a couple of examples which are explained in the sub sections of this Color subject.

9.9.5.1 Text Object Example

For this example we added a text object to the Page design and set the colors as shown below:

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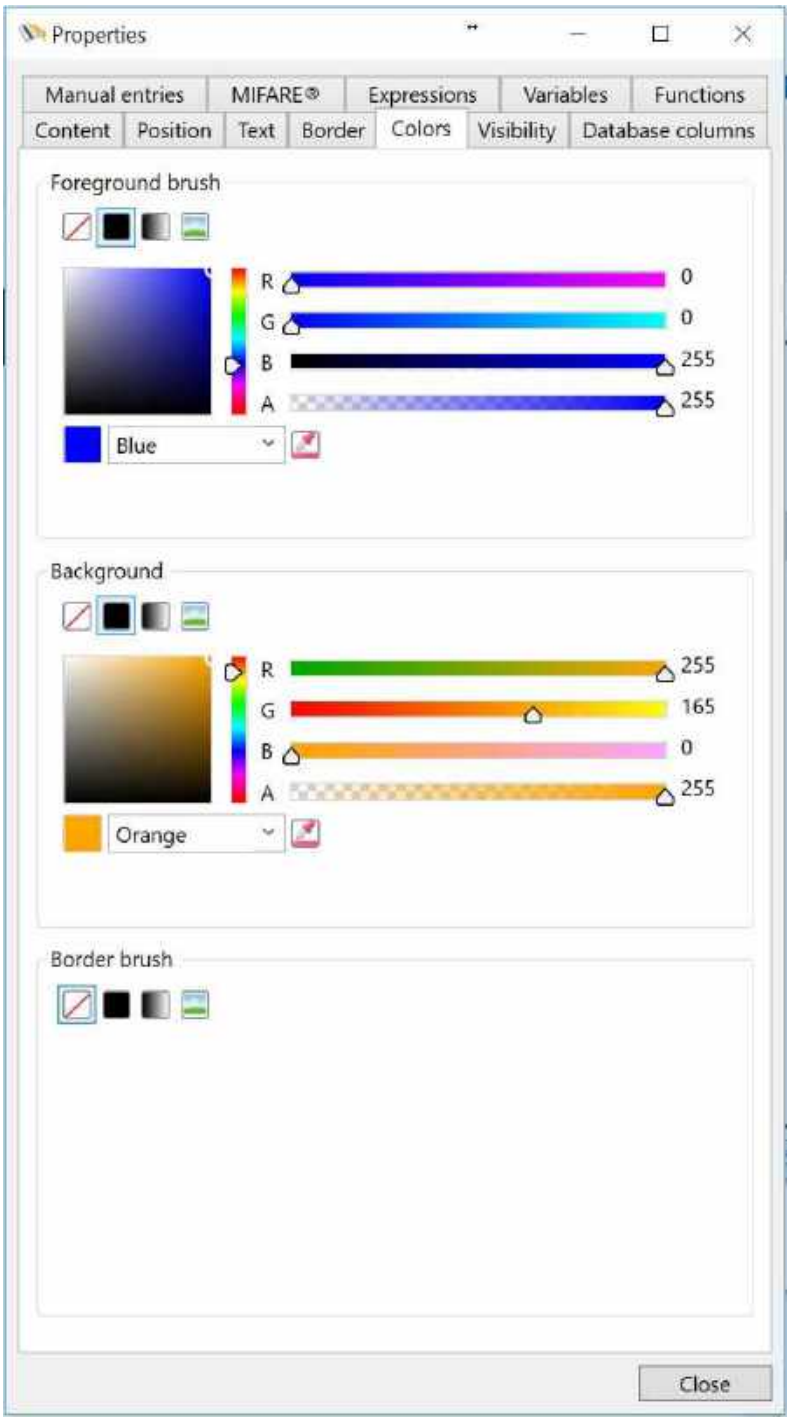

The foreground color is set to blue and for the background color we used orange with a gradient style which creates the result below:

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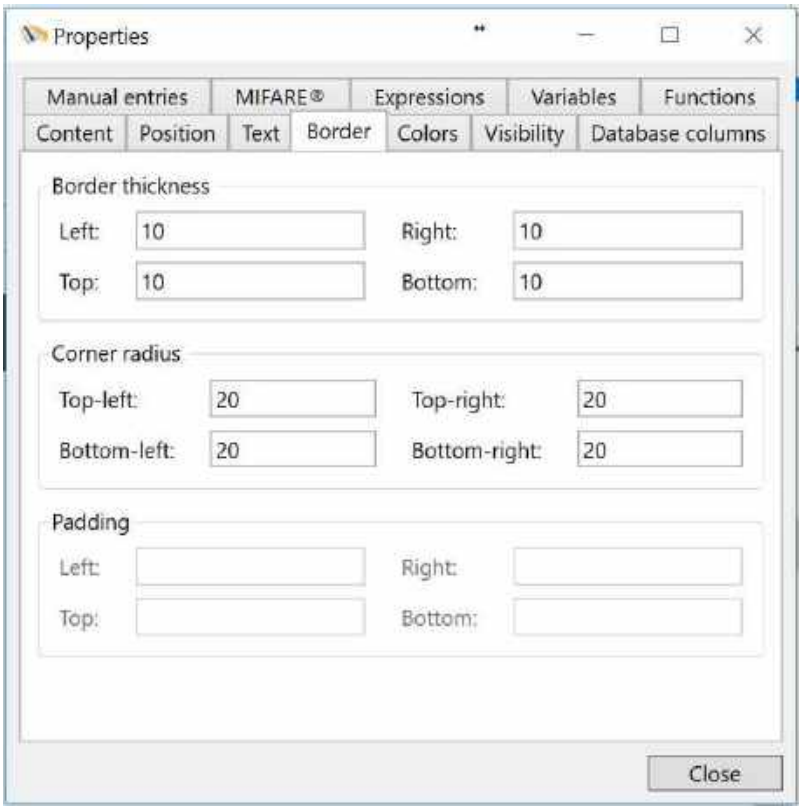
Using Color with an Text object...

9.9.5.2 Image Object Example

For this **Image Object** example we added a **Image** of a photo to the Page 325 design and created a border via the Border 357 tab. We have set the system to use pixels and we have the set the properties as following:



Now the **Image object** on the Page 325 design looks like below:

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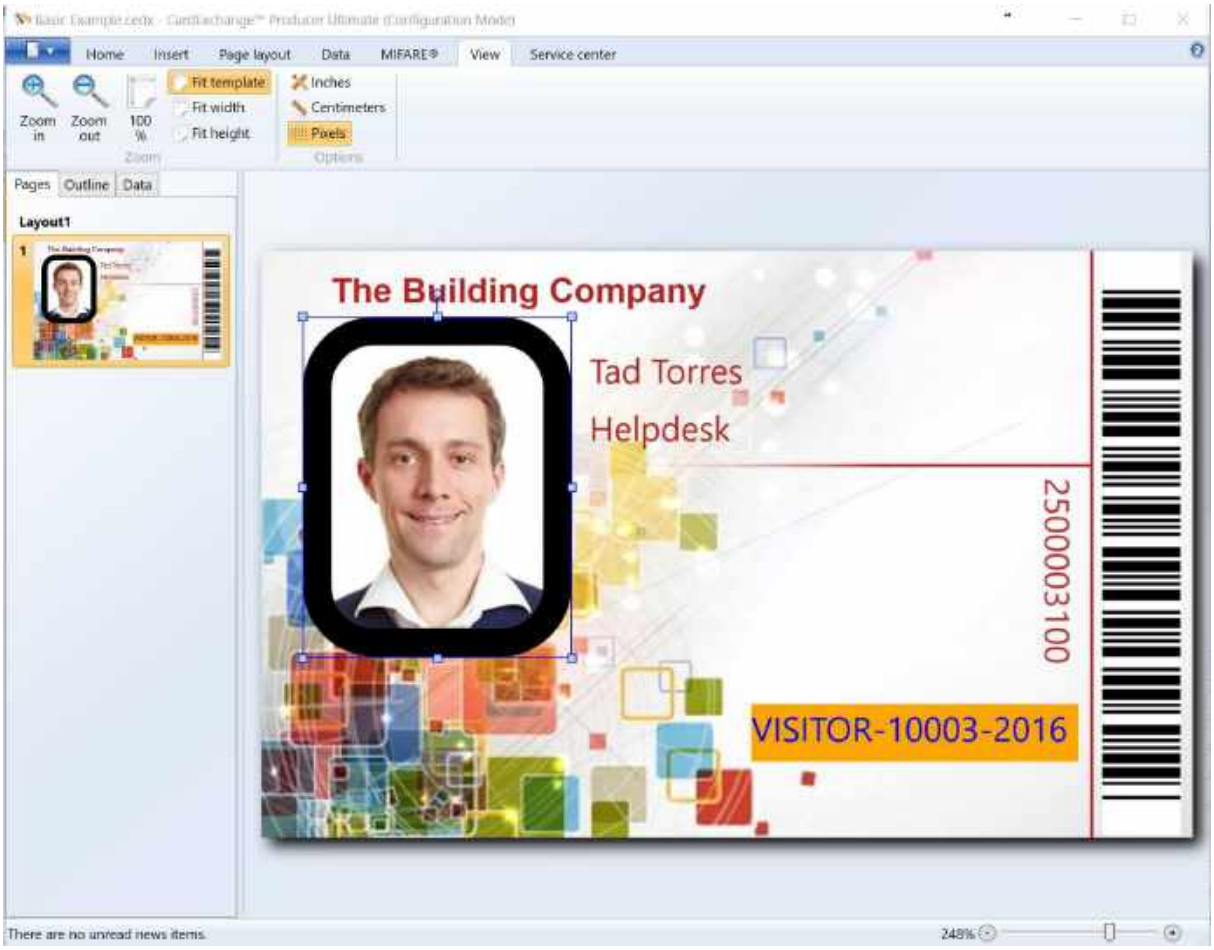
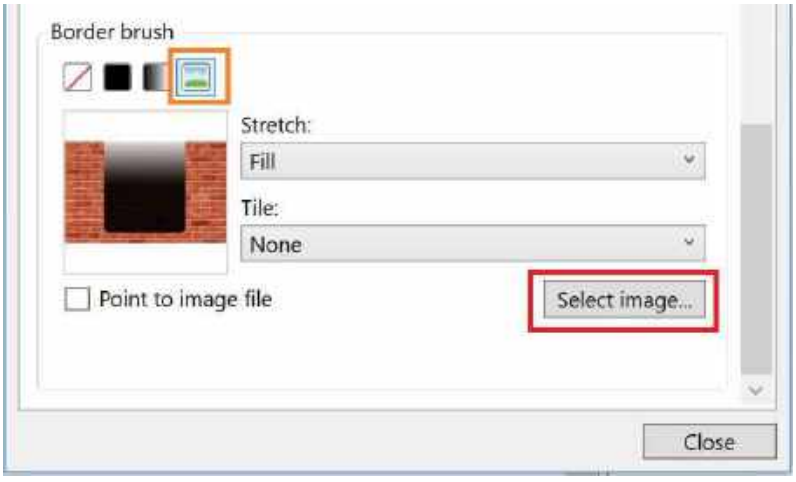


What we will do now is replace the **Solid Color Border** with an Image that we will load.



In the **Border brush** group we select the Image style as indicated with the **orange box** and we select an image by clicking on the **Select image...** button as indicated with the **red rectangle**. When the image is loaded, the Page 325 design will show the following result:

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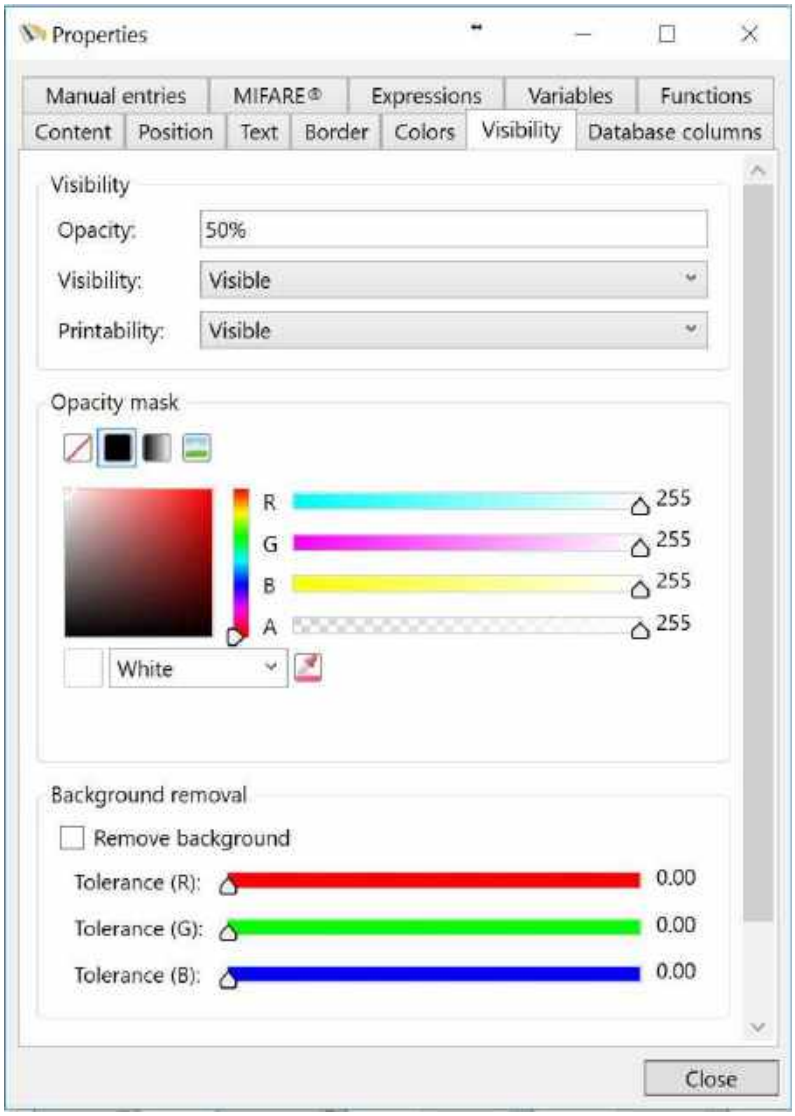
9.9.6 Visibility



The Visibility tab contains three separate group sections:

- Visibility
- Opacity mask
- Background removal

Visibility

In the visibility group you can set the opacity of the image on the Page design. This can be used to create ghosting images. For example, as shown in the screenshot, see the differences in the images shown below:

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No Opacity **Opacity 50%**

Besides setting the opacity for the image, you can also select the visibility of the image as well the printability. Each drop down menu offers three selections:

- Visible
- Hidden
- Collapsed

Opacity Mask

With the Opacity mask you can do some great and advanced stuff. For example, we have created an opacity mask using the gradient tool and the background color orange.

Now take a look at the photo images below. On the left you have the original and on the right the photo with the opacity mask.

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No Opacity

Using Opacity Mask

But you can also load images or use solid colors.

Background Removal

CardExchange® Producer offers advanced background removal. Use the sliders to define the correct removal. You can also enter the values directly into the text boxes right from each color slider. For example, we removed the background based on the slider configuration below.

Now take a look at the photo images below. On the left you have the original and on the right the photo with the background removed.

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No Removal

Background Removed

It is important to realize that the result of the background removal depends on the quality of the image and the used background. Always try to use real blue or green backgrounds when taking photos as this offers the best removal result.

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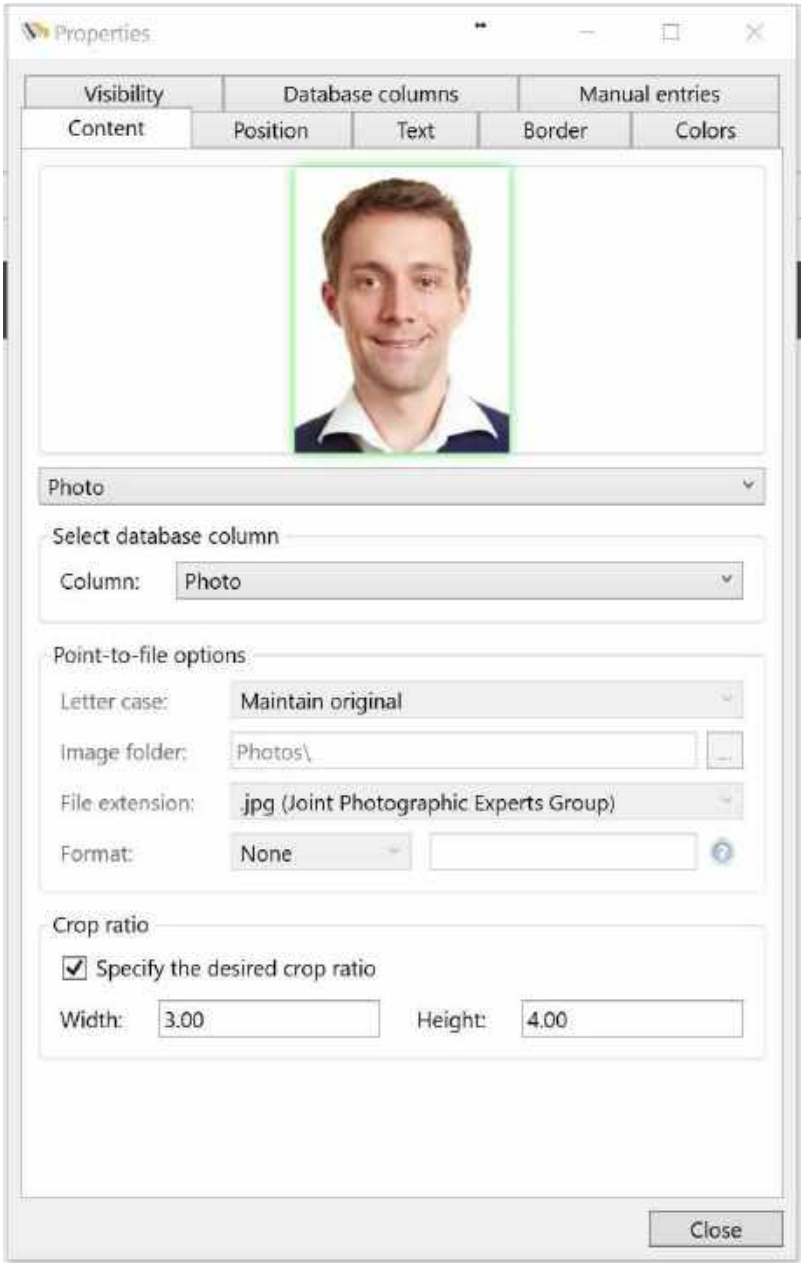
9.9.7 Database Columns



All of the database columns are available in the **Database columns** tab of the Properties 347 window.

Just like with the Manual entries 374, these database columns can be directly drag and dropped to the Page design via the Data tab of the Explorer menu.

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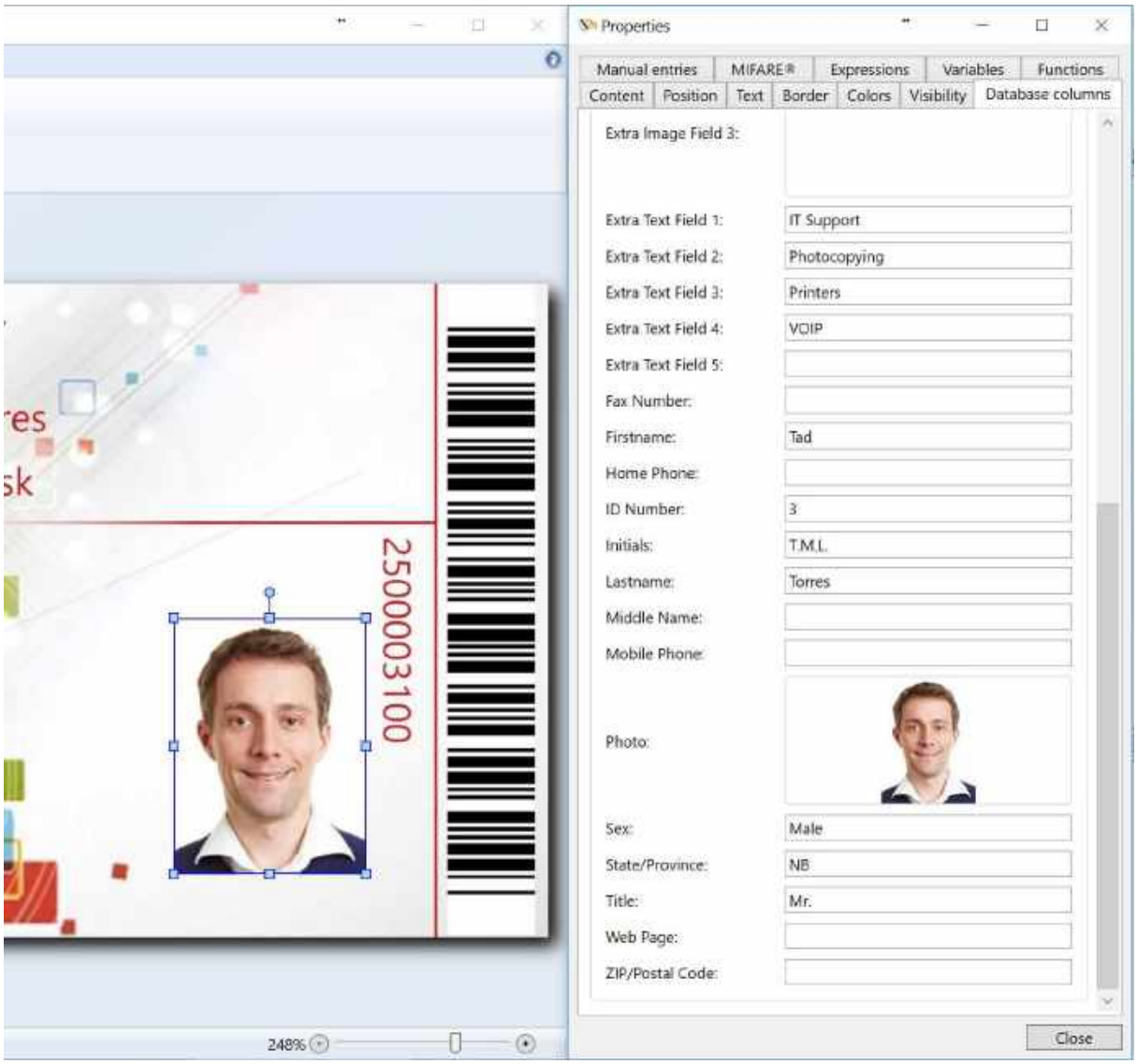

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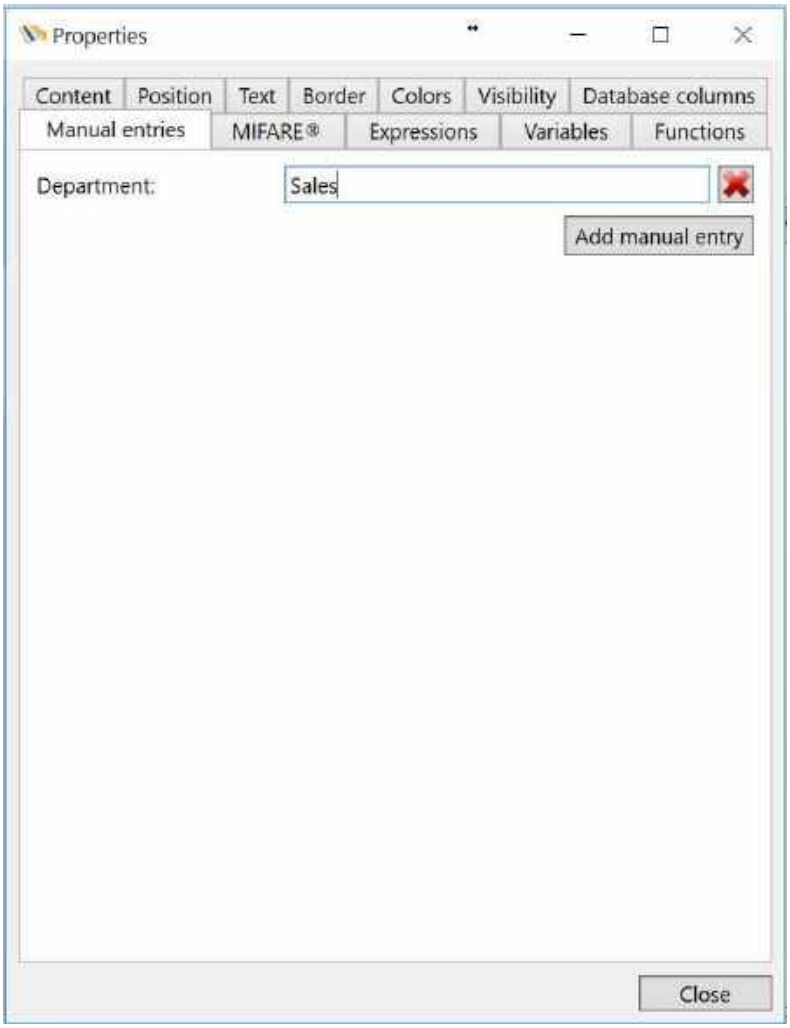
9.9.8 Manual Entries



To add a manual entry, select the Manual entries tab of the Properties window.

And click the **Add manual entry** button indicated with the **red** arrow.

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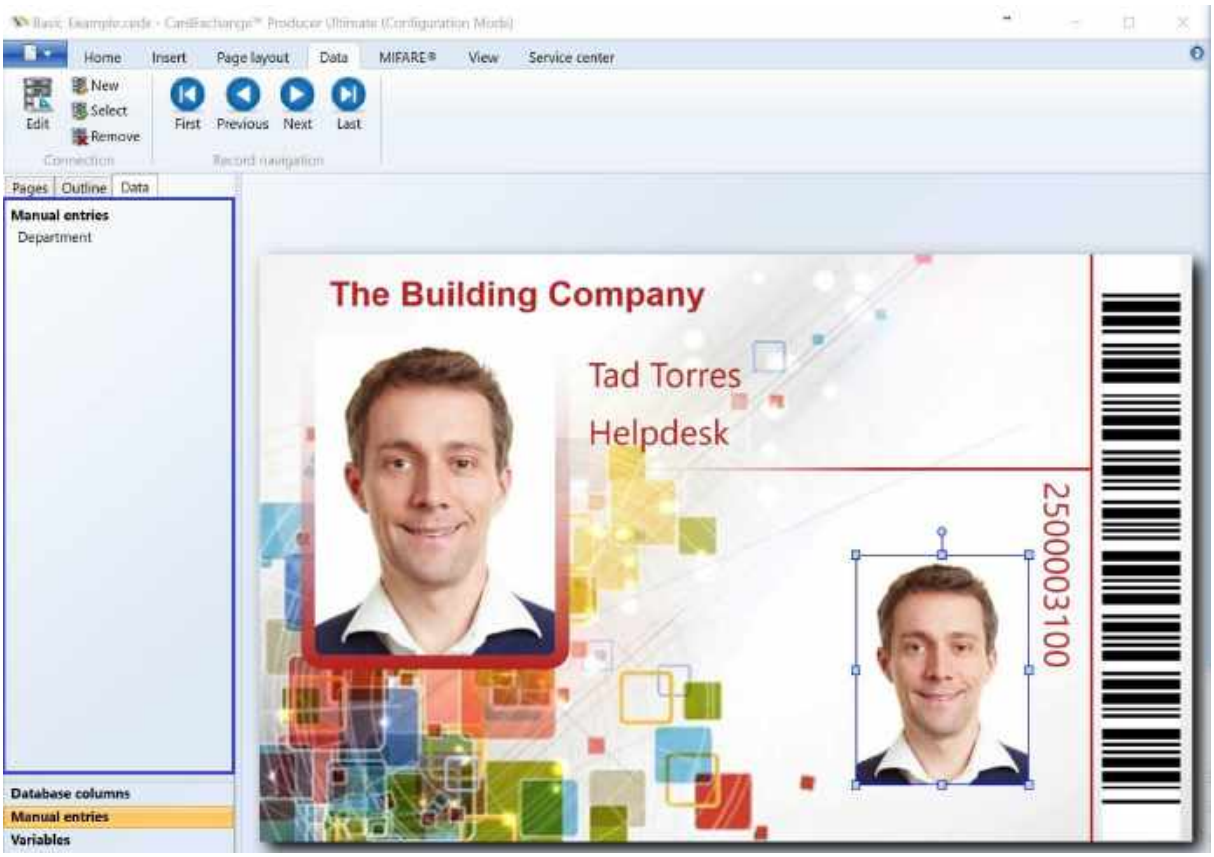
When the Entry is added, you start with entering a name for the label, indicated with **label1**. For example, DOB (Date of Birth). Next you enter a value in the value1 field. This can be, for example, a value like **100** if you are using the entry to always store the same value.

Now when you are done adding your Manual entries, they will become available for adding them to you Page 325 design in the Data 317 tab of the Explorer 316 menu.



When you select the Data 317 tab of the Explorer 316 menu, you will see the Manual entries tab as indicated. When you select this tab, the added Manual entries become available as shown in the blue rectangle. Now you can simply drag and drop them to your Page 325 design.

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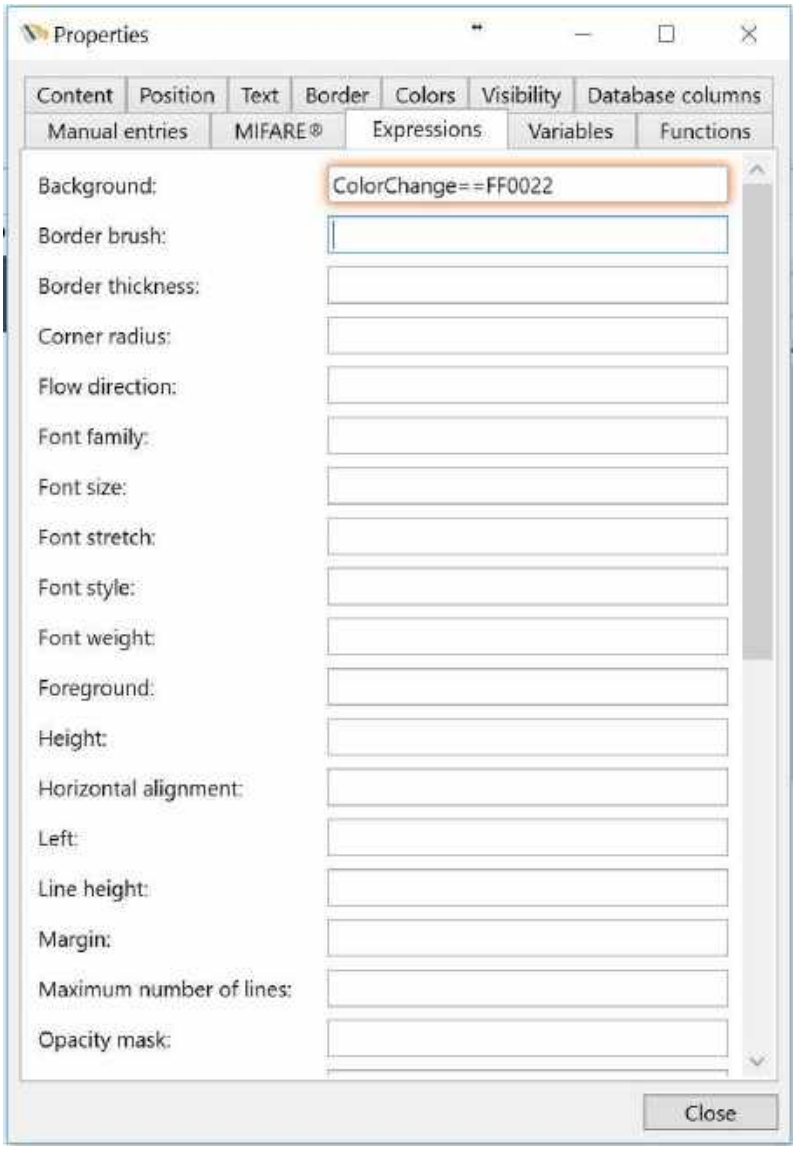
This can also be done from the **Manual entries** tab in the Properties 347 window.

9.9.9 Expressions



IMPORTANT! Expressions are supported in our Ultimate edition only!

The **Expression** tab of the Properties 347 window makes it possible to control any property of a **Page** object by means of a Python script, a **Database** column or a **Manual Entry**.

To control an object property with a script, select the object and enter the Python script in the text box next to the property name. For example, select a text object on the card layout

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and enter the following script for the Background property of that text object (in this case the script is just a single variable name):

vColor

After pressing **Enter**, the designer will prompt for a default value for the script variable *vColor*. Here you can type, for example:

Red

After closing the pop-up window, the background of the text object will be **red**. The text box where the script was entered will show a red glow to indicate that this value is now controlled by a script. Changing the value of the script variable in the Variables 333 tab of the Properties 347 window, will make the background color of the text object change accordingly.

For any script defined in the **Expressions** tab, it is important that the result value can be converted to the correct data type. CardExchange® Producer recognizes many text representations, like '**Red**' in the above example. Please, note that CardExchange® Producer recognizes the standard color names as well as the HTML representation of a 32-bits ARGB color, for example:

#FFFF0000

Scripts can only contain a single line of code. For that reason, it will generally be necessary to define functions in order to get program more complex functionality. For the **Background** property, one can, for example, define the following function in the Functions 335 tab (For more information about Functions 335, please see the Functions 335 section in this Help file).

```
def IsValid(s):
  if s == 'OK':
    return 'Transparent'
  else:
    return 'Red'
```

With this function, the script for the Background property can look like

IsValid(*vStatus*)

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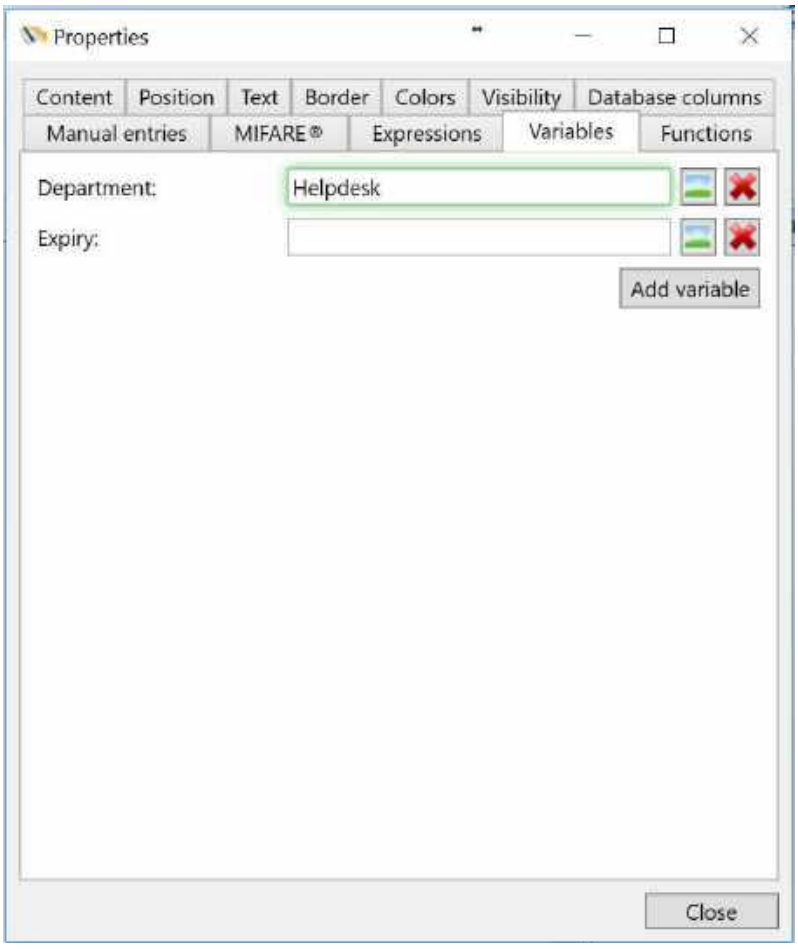
If the variable ***vStatus*** has the value '**OK**', the background of the text object will be **transparent**, and **red** otherwise.

It is also possible to control the **value** of a **property** directly by a **database column** or **manual entry**, without the intervention of a **script**. This can be achieved by dragging and dropping a **database column** or **manual entry** from the Data tab of the main window and drop it on the text box in the **Expressions** tab. Database-column mappings are characterized by a **green** glow and Manual Entries by a **yellow** glow.

9.9.10 Variables



IMPORTANT! Variables are supported in our Ultimate edition only!

Whenever a script is typed in the CardExchange® Producer designer, the **variables** used in that script are automatically added to the **template**. With the **Variables** tab it is possible to

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see all variables that have currently been defined and manage their properties. The following actions are possible:

- **Rename** a variable by clicking on its name and typing a new name.
- **Change** variable's value by typing in the text box next to its name.
- **Set** the variable's value to an image by clicking on its image button and selecting an image.
- **Remove** a variable by clicking on its remove button.
- **Add** a new variable by clicking on the Add-variable button.
- **Connect** a variable to a database column by dragging the column from the Data tab and dropping it in the text box
- **Connect** a variable to a manual entry by dragging the column from the Data tab and dropping it in the text box
- **Create** a text object on the card layout content is mapped to the variable by dragging the variable name from the Variables tab and dropping it on the card layout.

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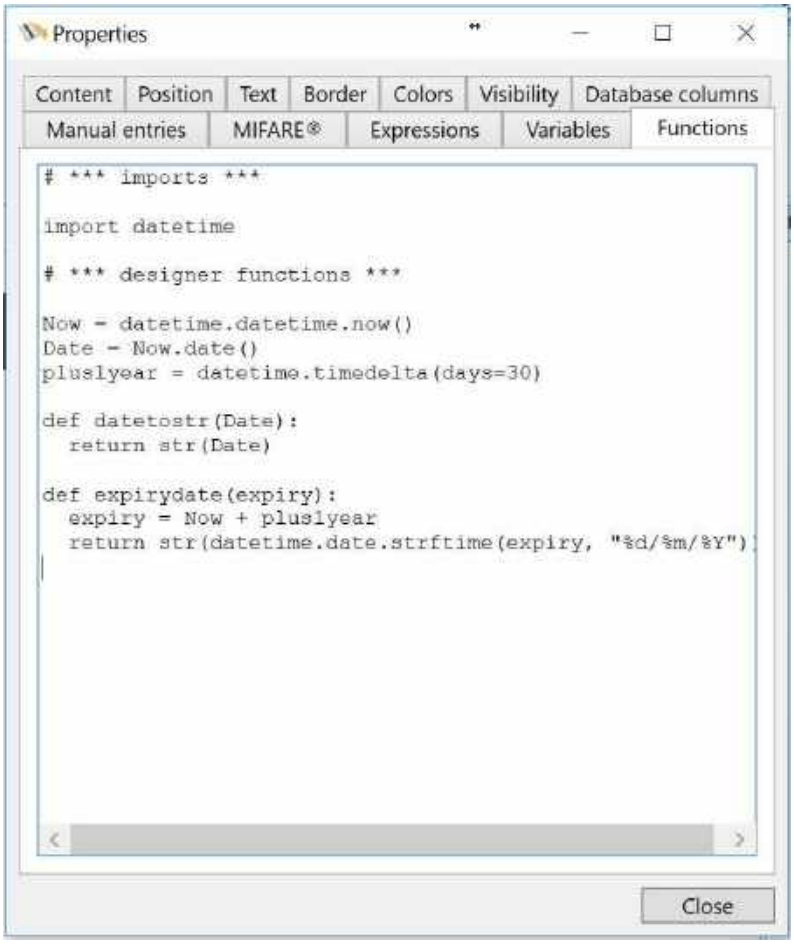
9.9.11 Functions



IMPORTANT! Functions are supported in our Ultimate edition only!

In the **Functions** tab, it is possible to define global **variables**, **functions** and **references** that can be used in **Python scripts**. By using well-defined functions, the scripts in the Content 349 and Expressions 376 tabs can be kept consistent. It would not be possible to use much of the power of **Python** in scripts, if you could not define functions.

A function definition should strictly follow the **Python** syntax as described in the **Python** documentation. An example of a function is:

```
def IsValid(s):
  if s == 'OK':
    return 'Transparent'
```

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```
  else:
    return 'Red'
```

This function returns either '**Transparent**' or '**Red**' depending on the value of the input parameter ***s***.

Global variables can be defined in the **Function** tab with a simple assignment statement. Once defined, they can be used in **functions** and **scripts**. For example, instead of the above function, we could make the following definition, with the global variable ***warningColor***:

```
warningColor = 'Red'

def IsValid(s):
  if s == 'OK':
    return 'Transparent'
  else:
    return warningColor
```

Finally, the **Functions** tab can be used to reference **Python** modules, in order to use them in **functions** and **scripts**. The following example imports the **.NET Framework System** module and uses it to re-format a date string:

```
import System

def FormatDate(s):
  d = System.DateTime.Parse(s)
  return d.ToString('dd-MM-yyyy')
```

CardExchange® Producer uses **IronPython** for executing scripts. **IronPython** is the **.NET Framework** implementation of the well-known **Python scripting language**. For extensive documentation on **IronPython**, please visit www.ironpython.org.

9.10 Layouts

As explained in the Templates 345 section of this Help file, Layouts can contain one ore more Pages. If you are running a Go or Premium edition, only one layout is allowed. When running a Professional or Ultimate edition, you can use multiple layouts within your template.

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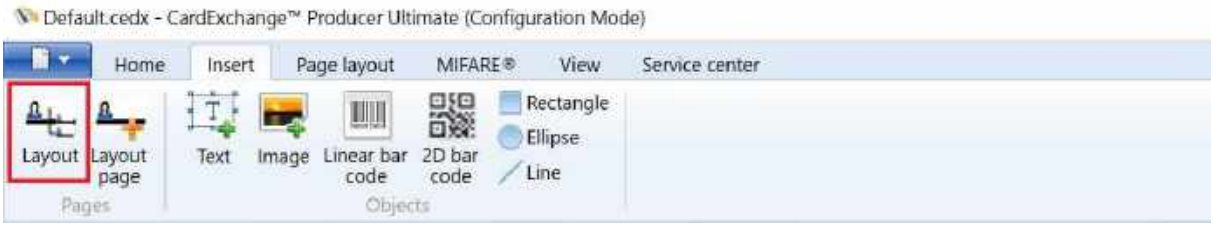
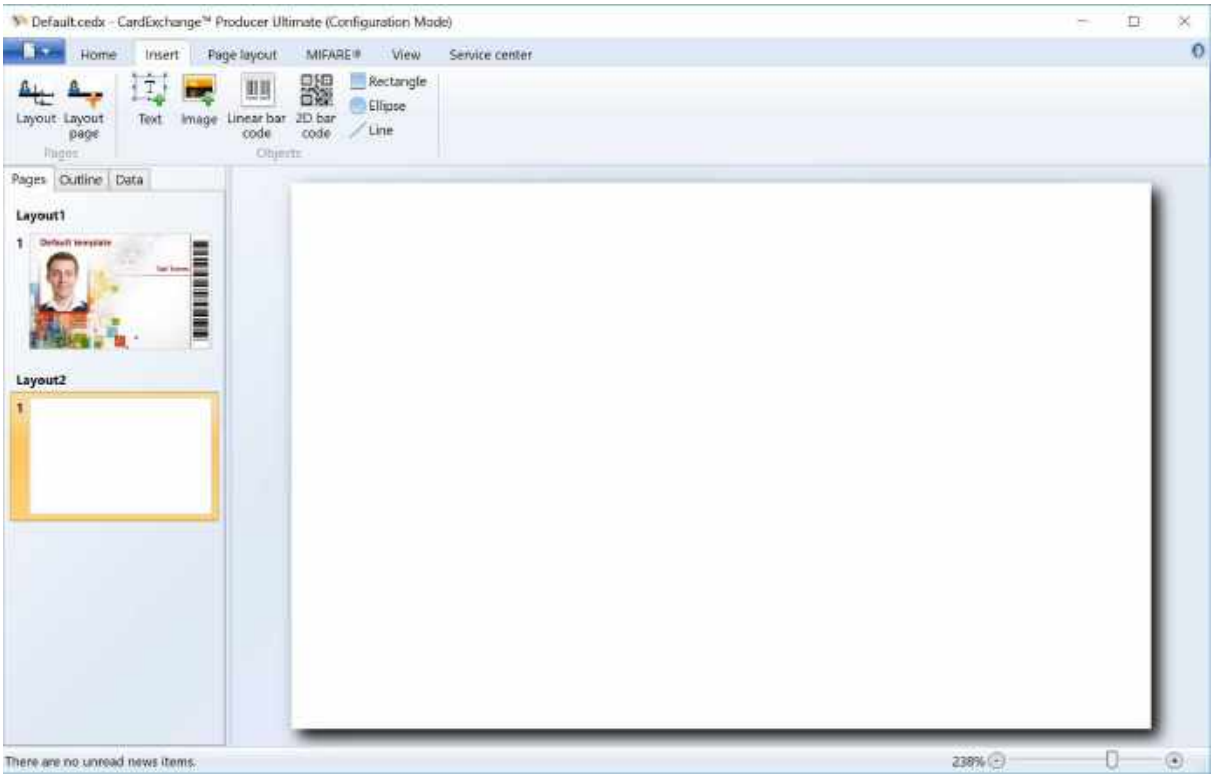
Layouts are very powerful as they offer you the possibility to change based on information out of the connected database. Also each layout can have it's own setting like for example, no magnetic encoding or magnetic encoding.

9.10.1 Adding Layout(s)



Adding a Layout is simple clicking on the Layout button and a new layout will be added.



When adding a layout, it always adds a layout based on the previous layout. So for example in the screen shot Layout2 contains only one page because Layout1 contains only one page. If Layout1 had two pages, Layout2 would also have two pages.

Each page can be setup via the Page Setup 323 window as described in that section of this Help file.

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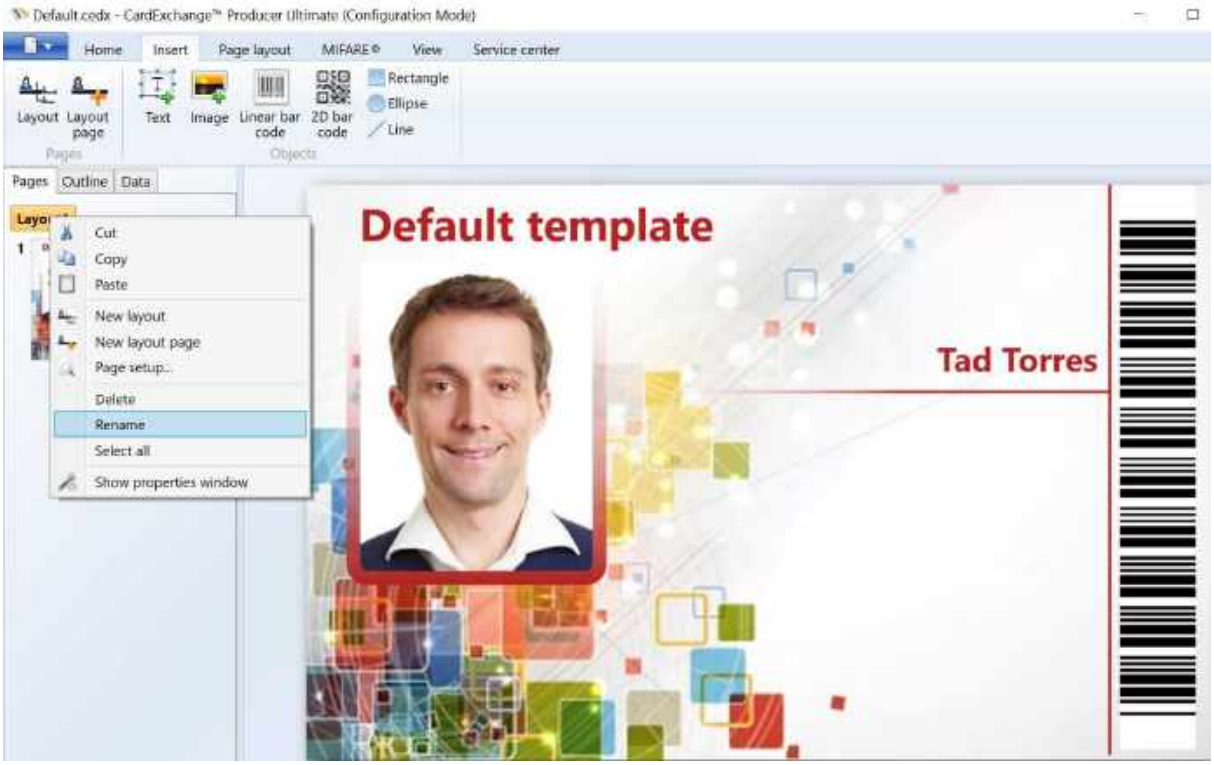
9.10.2 Edit Layout(s)



For your own convenience it is possible and advisable to rename the Layout(s). When you right click on the Layout name a context menu will be show and you select Rename. You can also double click on the Layout name and change it.

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9.10.3 Delete Layout(s)

You can easily delete a Layout from your template by selecting the Layout and press Delete on your keyboard. By selecting the Layout and right click on the mouse, in the presented context menu you choose Delete.

You can always undo your deleting by pressing Ctrl+Z.

9.11 Page(s)

Every Layout can basically have unlimited Pages. A Layout can have for example a Front-side Page, a Back-side Page, a Front-side UV Page, etc.

Each Page can be set to Portrait or Landscape and of course can have it's own unique objects.

In this section of the Help file we will explain how to Add pages to your layout and how to Delete them.

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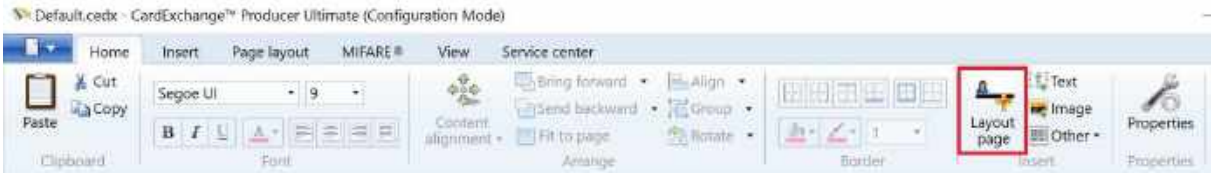
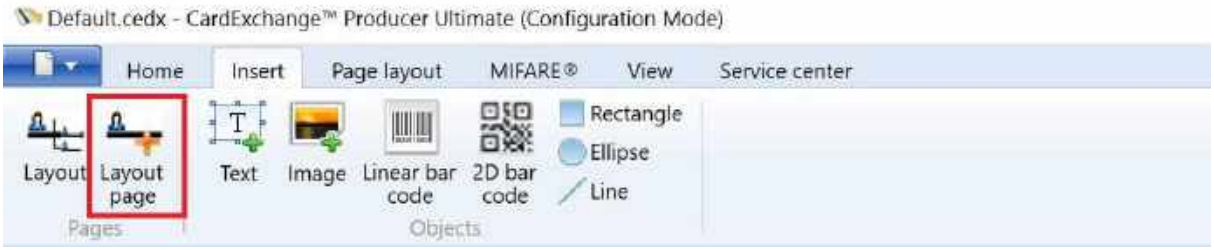
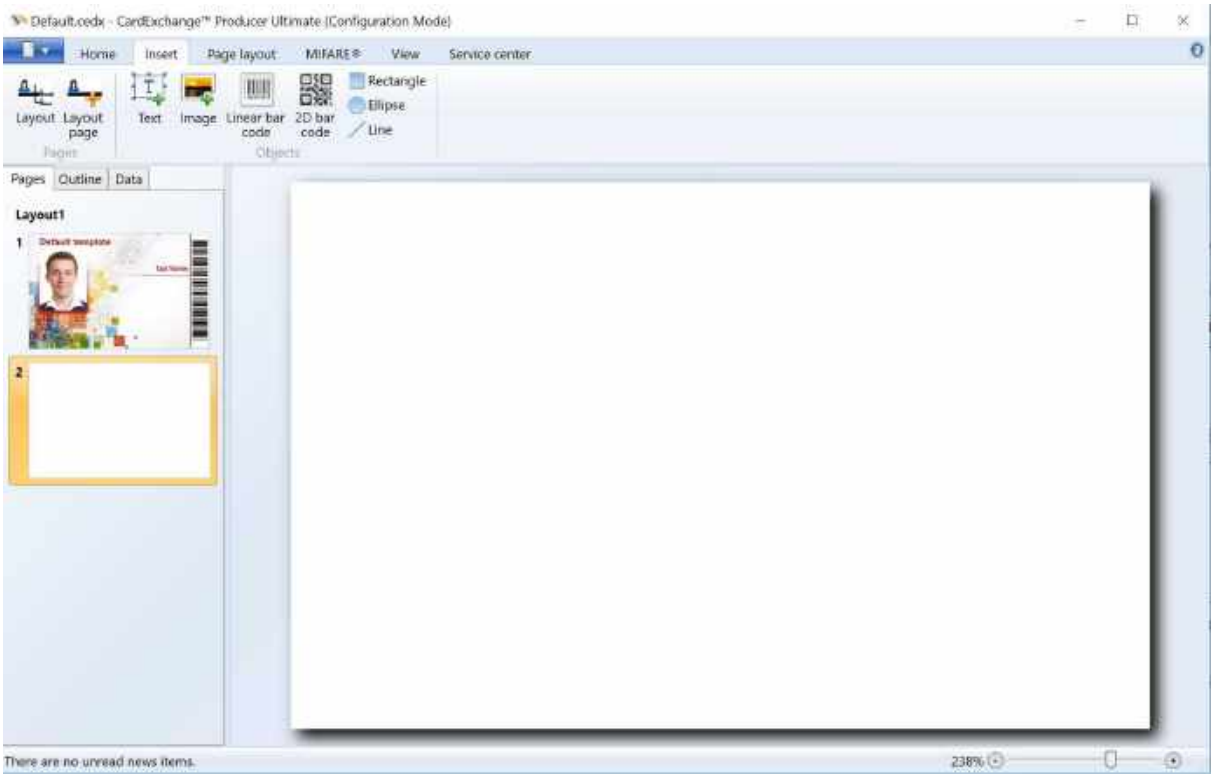
9.11.1 Adding Page(s)



When you have selected your layout, you can add a page by clicking on the Layout Page button in the Home tab.



You can also add a Page via the Layout page button in the Insert tab.



Click on Layout page to add the page as shown in the screen shot.

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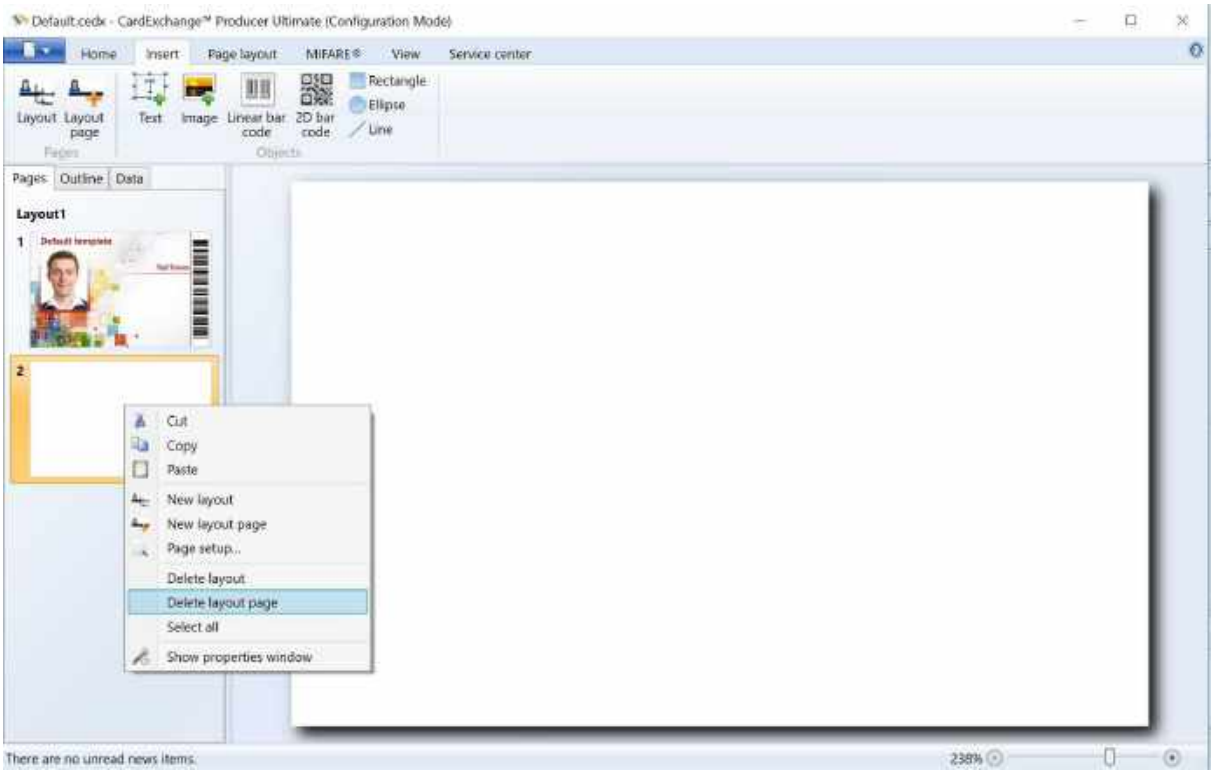
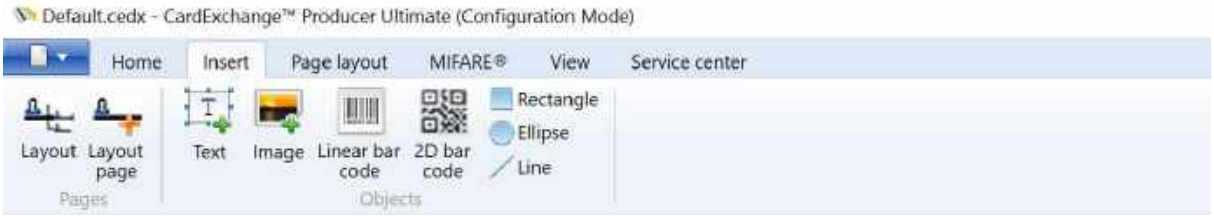
Each page can be setup via the Page Setup 323 window as described in that section of this Help file.

9.11.2 Delete Page(s)



You can delete a page by selecting it and click on Delete on your keyboard or via the right mouse click content menu, selecting Delete layout page.

9.12 Objects



CardExchange® Producer offers a lot of objects to design your card. From standard text objects to image objects for photos and signatures to 1D and 2D barcodes, lines, etc.

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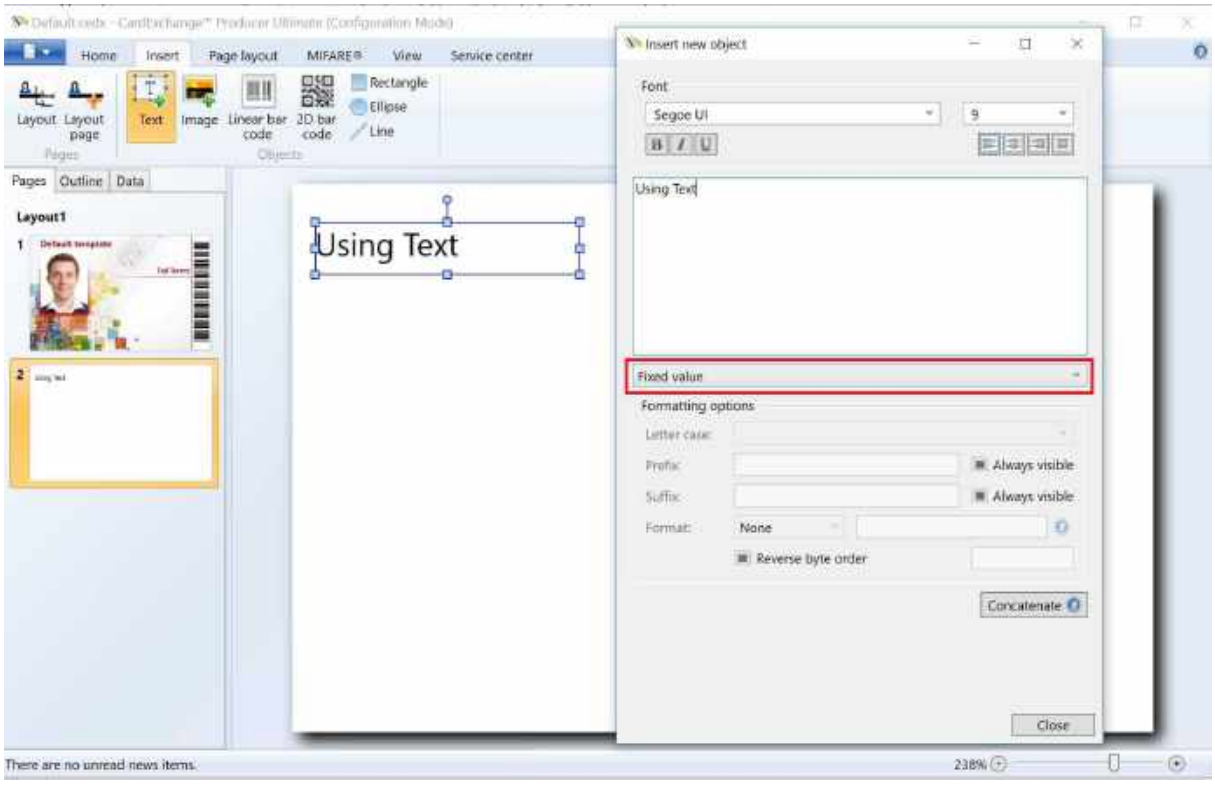
Each object comes with a collection of Properties that can be used to customize your objects to your wishes. The properties of the objects are explained in the Properties 347 section of this Help file.

In this section we will go over each available object and how to use it.

9.12.1 Text



Select the Text object from the Insert tab or from the Insert section of the Home tab. Click with the mouse on a location of the page and select one of the available Standard Object Types from the drop down menu. Select the font type, size, outlining, etc.

For more information about the different Standard Objects, please see the "Using Standard Objects 403" section of this Help file.

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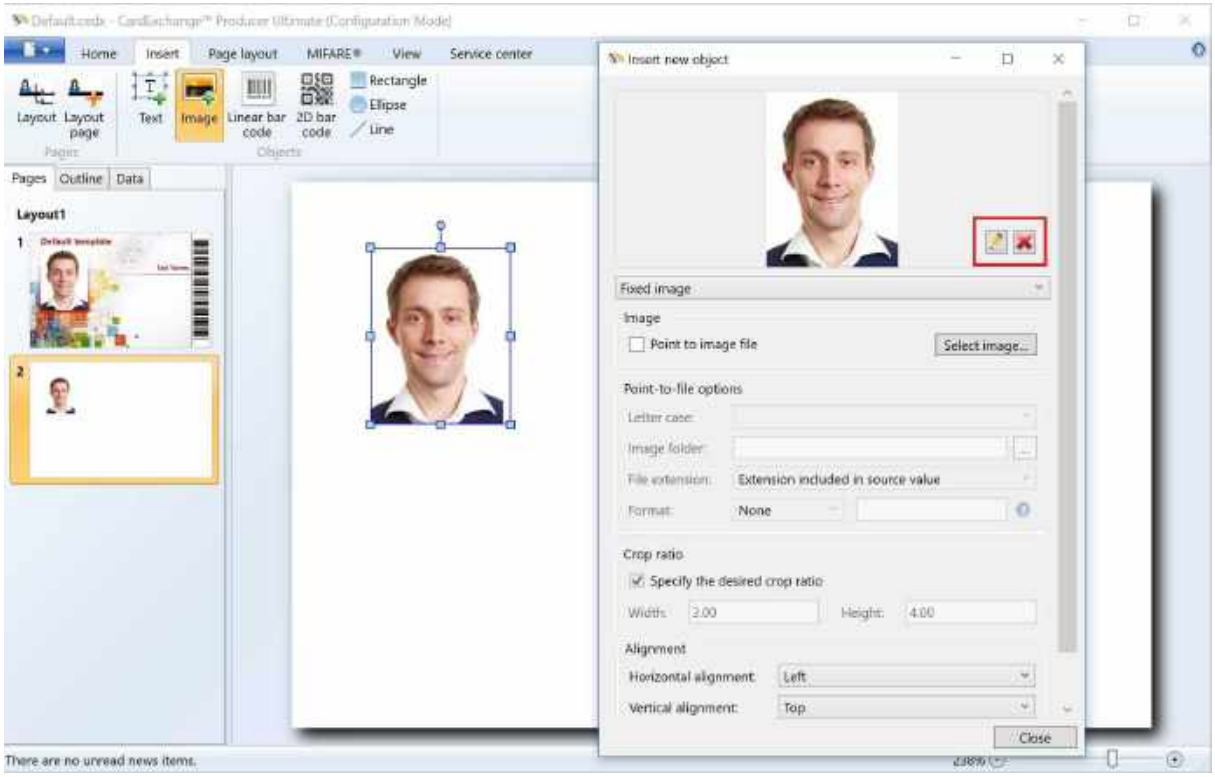
9.12.2 Image(s)



Select the Image object from the Insert tab or from the Insert group at the Home tab and place this on the page by clicking on a location on the page.

When the Insert new object window opens, it is default set to Fixed Image. You can also select Photo 390, Signature 391, Variable Image 392, and Script. You can find more information about these configurations in the specific sections of this Help file.

When using the Fixed image, you can select an Image by clicking on the Select image... button. When the image is presented, you can check the 'Point to image file' check box. By default it is unchecked which means that the image is embedded into the page. If the check box is checked, a reference to the file is made. The advantage of this is that it keeps your templates small because it does not contain images, disadvantage is that if the folder that contains the image is moved or removed, your image will not be shown anymore.

Of course it is also possible to align the image to your wishes. You can align the image horizontal, vertical, and stretch.
When you hover over the presented image, you will see two buttons appearing. The button will delete the previewed image, the button will open the ImageExchange® Editor 179 to make change to the image.

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More information about using the ImageExchange® Editor can be found in the "Using Image Editor 179" section of this Help file.

*IMPORTANT! Every object in CardExchange® Producer has many Properties which are not shown in the **Insert new object** form. Please see the Properties 347 section of this Help file for more information about specific use of functionality.*

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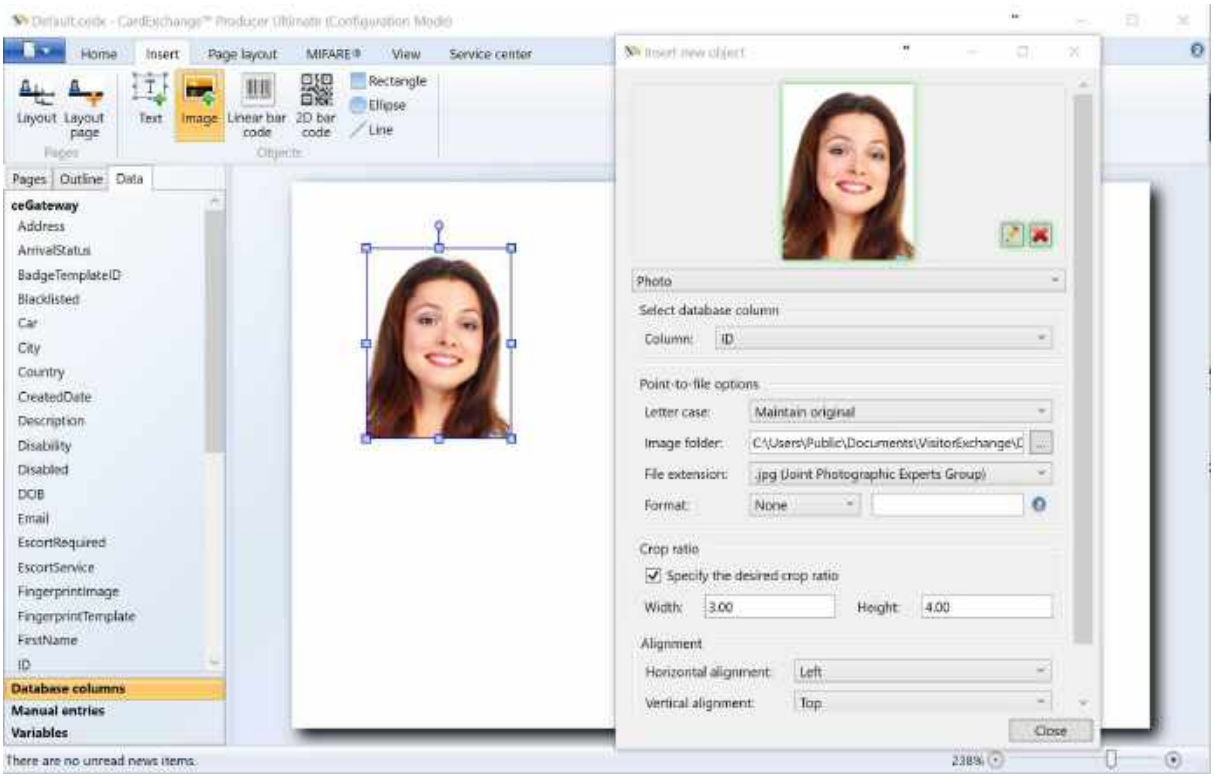
9.12.2.1 Photo(s)



When using photos you can select and dedicate an image to a specific photo field in the database or a reference to a photo in a folder based on a 'Point to image file' reference.

The process for adding the image is exactly the same as explained in the "Using Images 388" section of this Help file.

Select **Photo** from the object drop down box and the Select database column drop down box will become available. If you select the ID field of the connected database, the system will automatically make it a 'Point to image file' connection. It can also that your database contains the complete reference to image file locations if that is the case, please leave the Image folder location empty and set the file extension to 'Extension included in source value'.

The image folder location can be entered directly and it can also be selected by clicking on the ... button. Select the file extension of the image, we currently support bmp, jpg, jpeg, png, gif, tif and tiff.

You can also set the format of the value coming from the database so you know for sure there is no mismatch.

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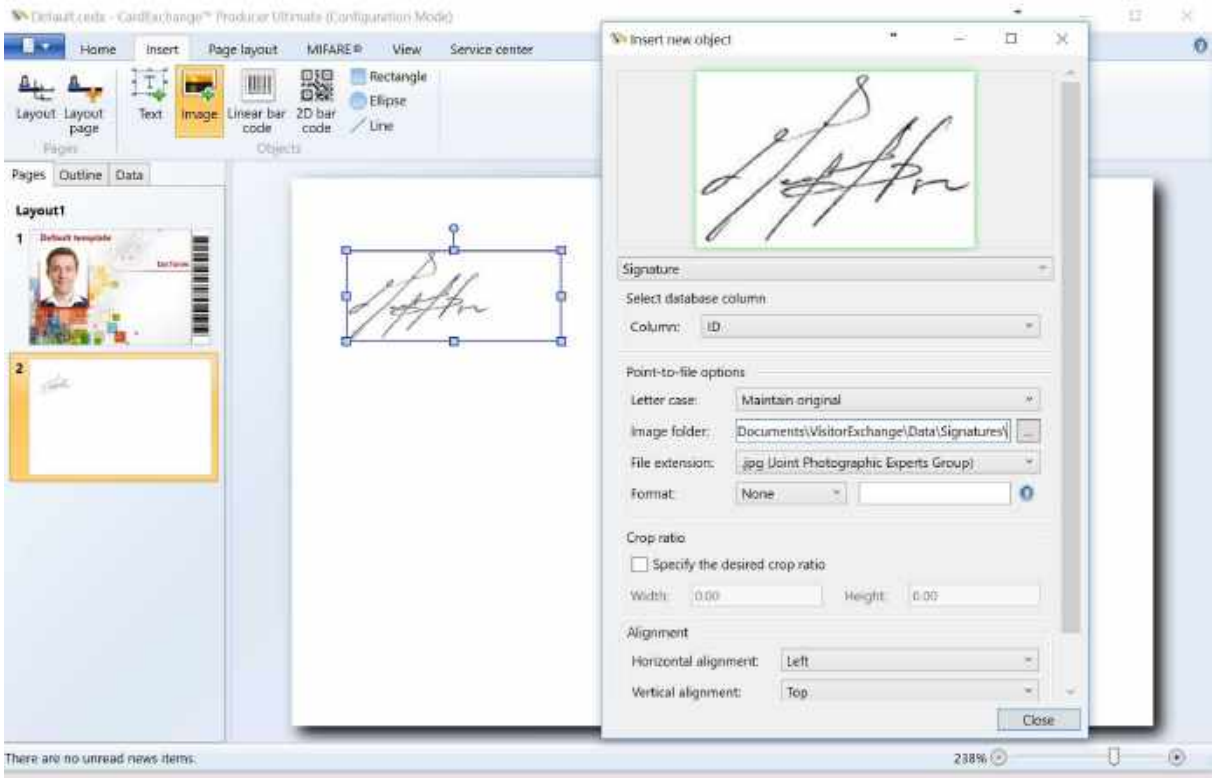
If the database contains the image data and you have selected the image column, the 'Point-to-file options' section will be disabled.

Check for more options like colors, borders, visibility, etc., the Properties 347 section of this Help file.

9.12.2.2 Signature(s)

IMPORTANT! This Signature option is available from Premium editions and higher!



Starting from Premium, you can select and dedicate an image to a specific signature field in the database or a reference to a signature in a folder based on a 'Point to image file' reference.

The process for adding the signature is exactly the same as explained in the "Using Images 388" section of this Help file.

Select **Signature** from the object drop down box and the Select database column drop down box will become available. If you select the ID field of the connected database, the system will automatically make it a 'Point to image file' connection. It can also that your

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database contains the complete reference to image file locations if that is the case, please leave the Image folder location empty and set the file extension to 'Extension included in source value'.

The image folder location can be entered directly as it can also be selected by clicking on the ... button. Select the file extension of the image, we currently support bmp, jpg, jpeg, png, gif, tif and tiff.

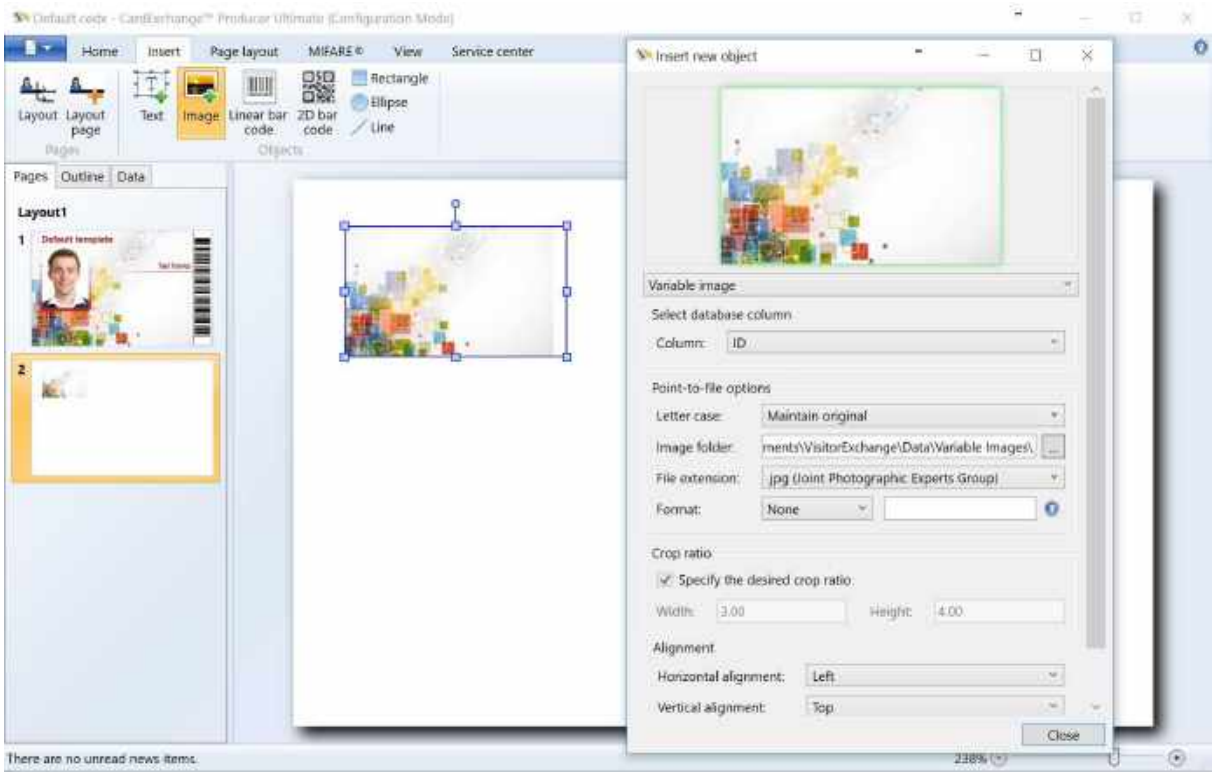
You can also set the format of the value coming from the database so you know for sure there is no mismatch.

If the database contains the image data and you have selected the image column, the 'Point-to-file options' section will be disabled.

Check for more options like colors, borders, visibility, etc., the Properties 347 section of this Help file.

9.12.2.3 Variable Image(s)

IMPORTANT! This Variable Image option is available from Premium editions and higher!



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Our Premium edition offers a unique feature that allows you to switch images based on a value of the database.

The process for adding the Variable Image is exactly the same as explained in the "Using Images 388" section of this Help file.

Select **Variable image** from the object drop down box and the Select database column drop down box will become available. If you select the ID field of the connected database, the system will automatically make it a 'Point to image file' connection. It can also that your database contains the complete reference to image file locations if that is the case, please leave the Image folder location empty and set the file extension to 'Extension included in source value'.

The image folder location can be entered directly as it can also be selected by clicking on the button. Select the file extension of the image, we currently support bmp, jpg, jpeg, png, gif, tif and tiff.

You can also set the format of the value coming from the database so you know for sure there is no mismatch.

If the database contains the image data and you have selected the image column, the 'Point-to-file options' section will be disabled.

Check for more options like colors, borders, visibility, etc., the Properties 347 section of this Help file.

9.12.2.4 Backgrounds

There are basically two ways to use backgrounds on your page. You can simply add an Image object to your Page, select the Image to use, and select Fit to page.

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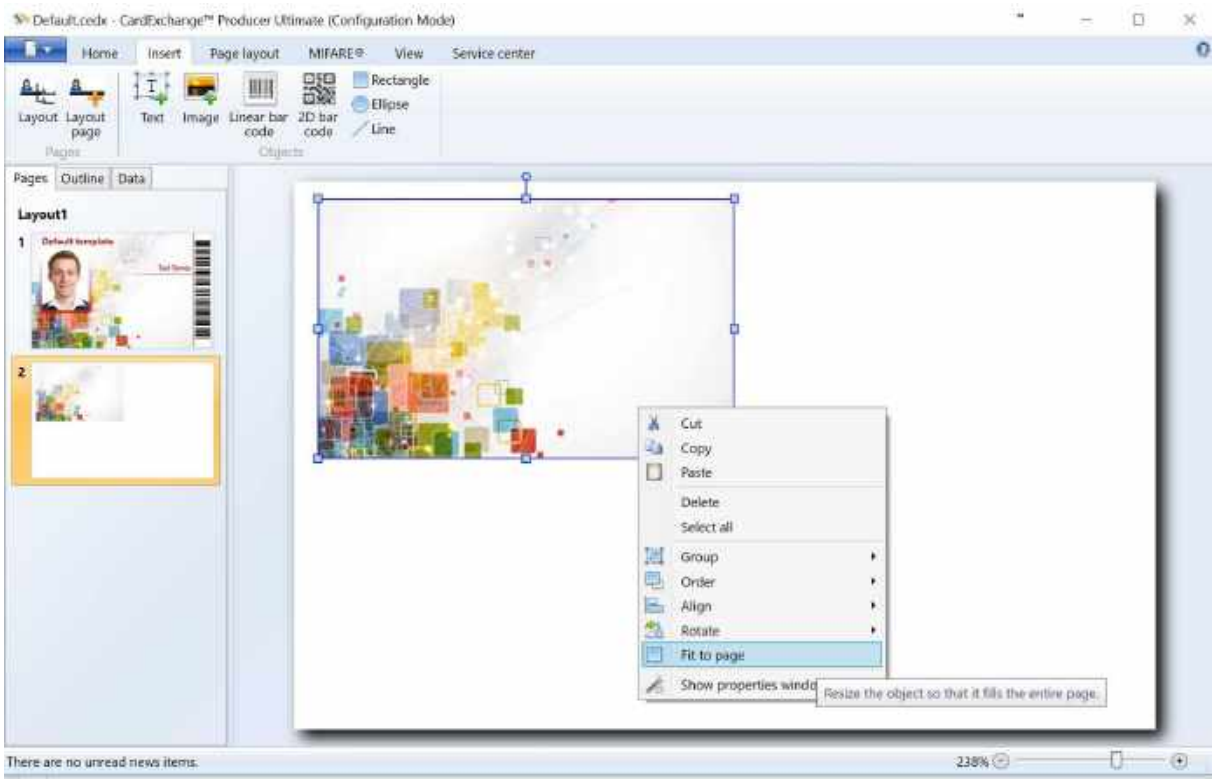

A better way to go is using the Background functionality offered in the Page Layout tab.

When you click on the Background button, four options are offered.

Use no color or image...

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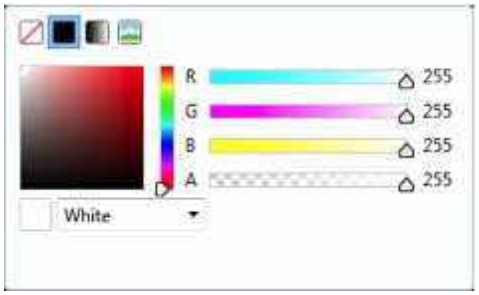
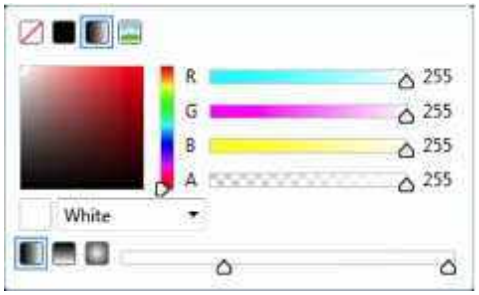


Choose from a one solid color...



Use a Gradient color...

Or use a background image.

The advantage of using a background via the Page Layout tab is that it will always make sure that it completely covers the whole card. As you know, the card sizes vary when using a Direct-to-Card printer or a re-transfer printer. With a re-transfer printer the print size of the page layout is larger and using this Background functionality makes sure that your image is always fitting the page and you will have no white lines with printing.

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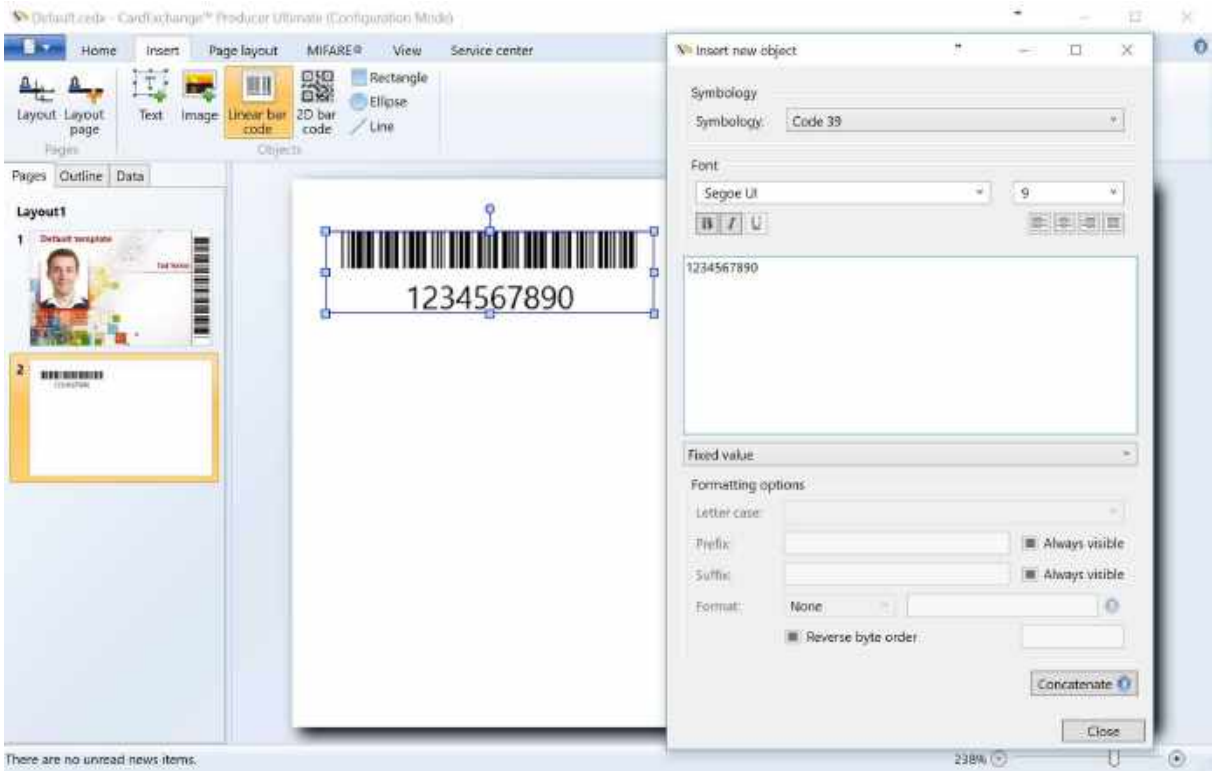
9.12.3 1D Barcode



To add a 1D barcode object to you page, just select the **Linear barcode** button from the Insert tab and click on a location on the page to place it. Now select the Symbology that you want to use from the drop down menu. All most common 1D Barcodes are supported.

Standard the Fixed value is selected, for using other values please see the "Using Standard Object Types 403" section of this help file.

Of course a lot of extra options are available for the 1D Barcodes but they need to be access via the Properties 347 window of the Designer. When the properties window is opened, select the Content tab.

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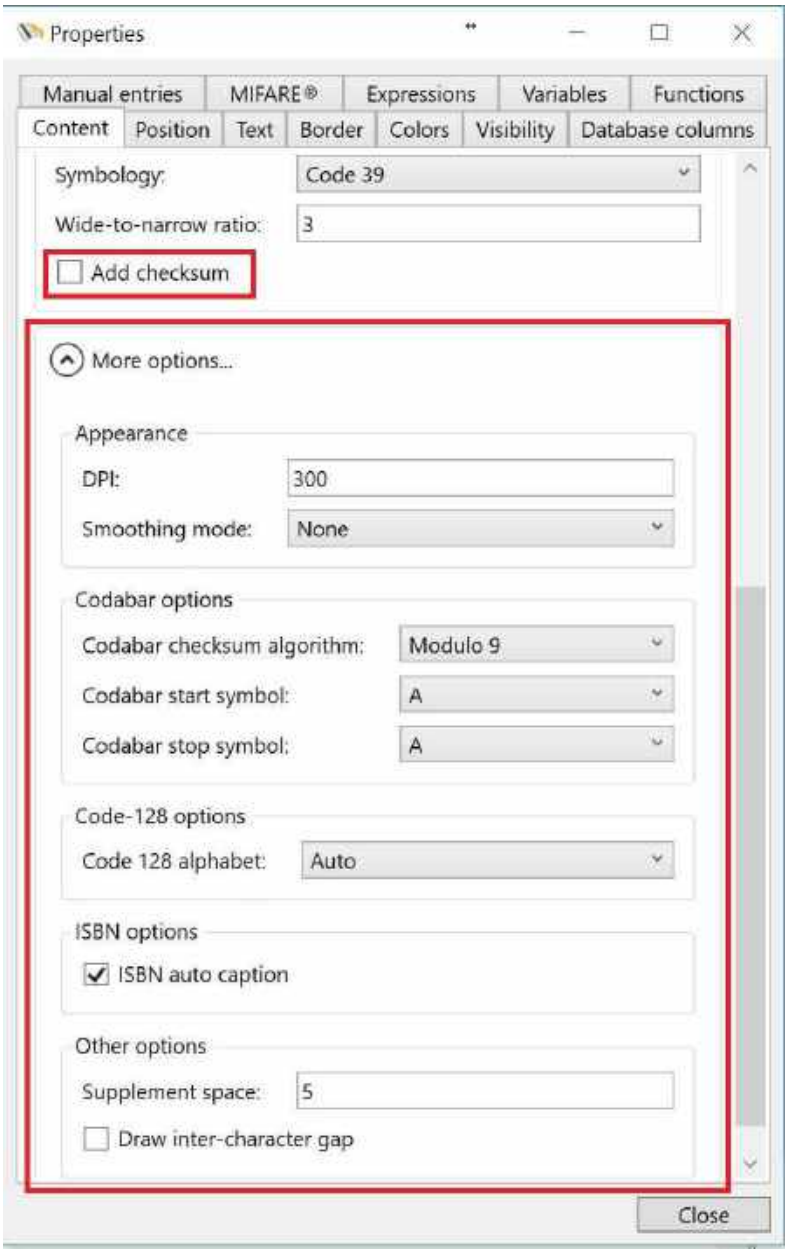

You can add a checksum, set the options for specific barcodes like Codabar, Code-128, etc.

9.12.4 2D Barcode

IMPORTANT! This 2D Barcode option is available from Premium editions and higher!

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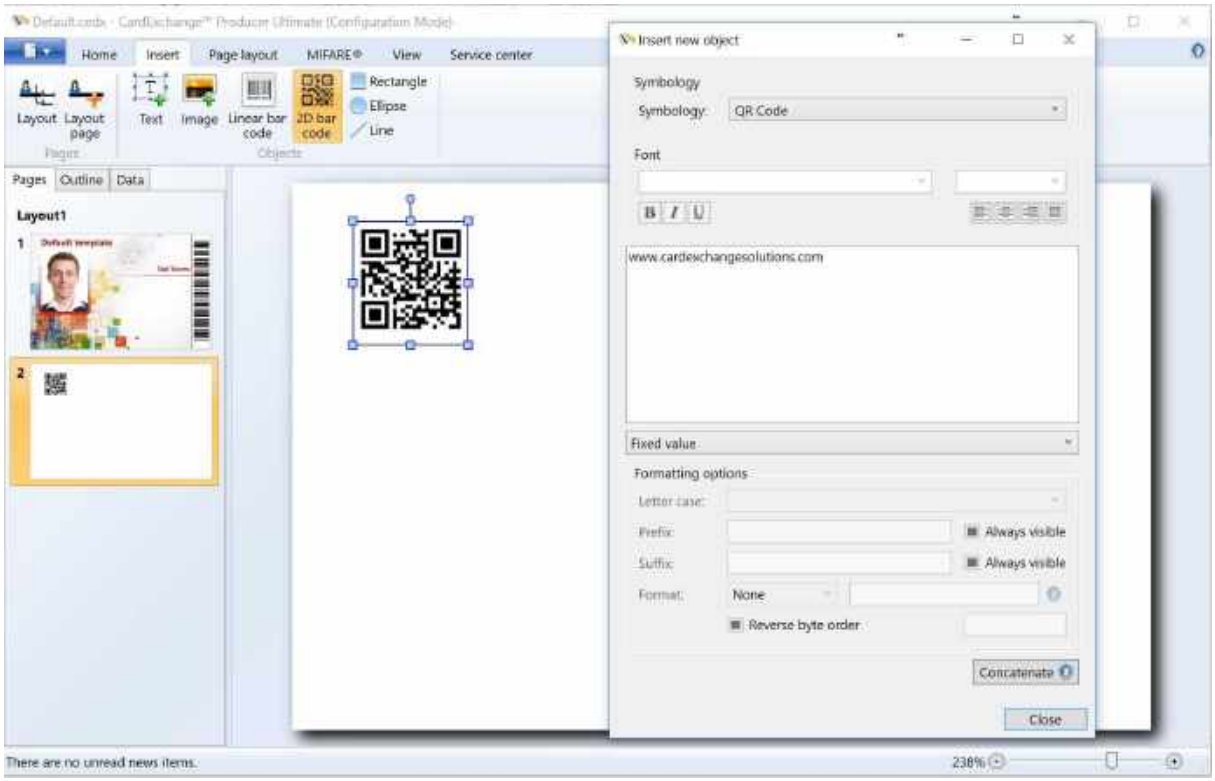

To add a 2D barcode object to you page, just select the **2D barcode** button from the Insert tab and click on a location on the page to place it. Now select the Symbology that you want to use from the drop down menu. All most common 2D Barcodes are supported.

Standard the Fixed value is selected, for using other values please see the "Using Standard Object Types 403" section of this help file.

Of course a lot of extra options are available for the 2D Barcodes but they need to be access via the Properties 347 window of the Designer. When the properties window is opened, select the Content tab.

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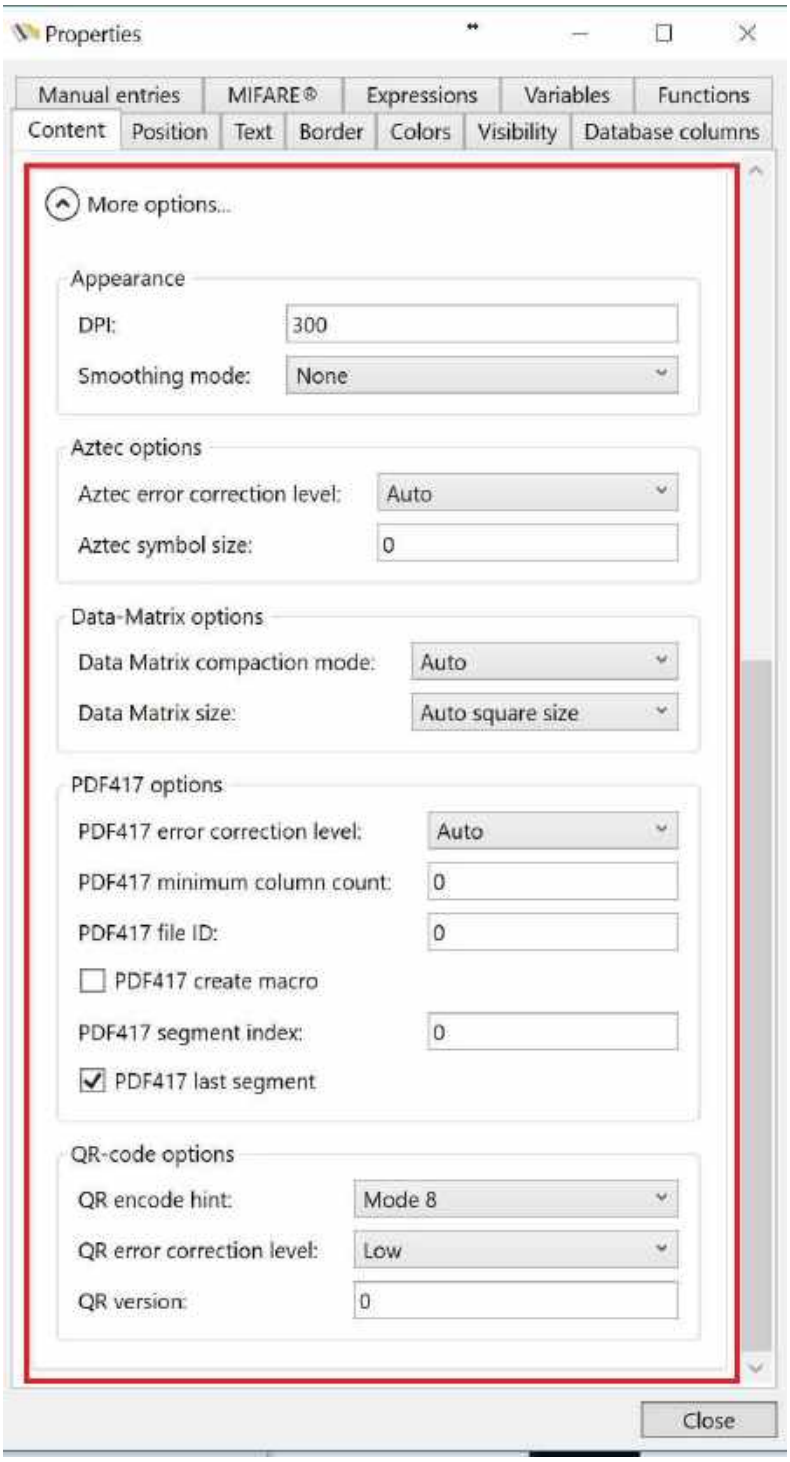

Just like with the 1D barcodes, a lot of specific 2D barcode options can be set.

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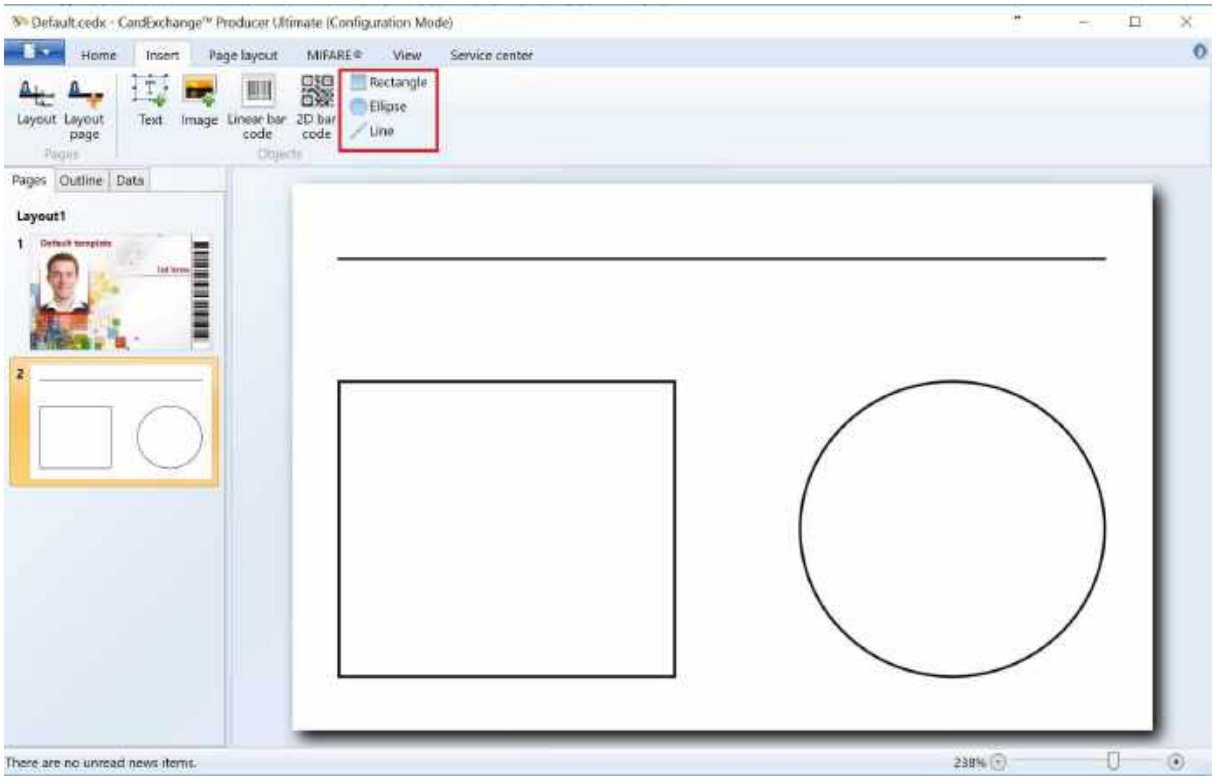
9.12.5 Drawing Objects



Select the Line, Rectangle, or Ellipse button to add it to the page.

Check for more options like colors, borders, visibility, etc., the Properties 347 section of this Help file.

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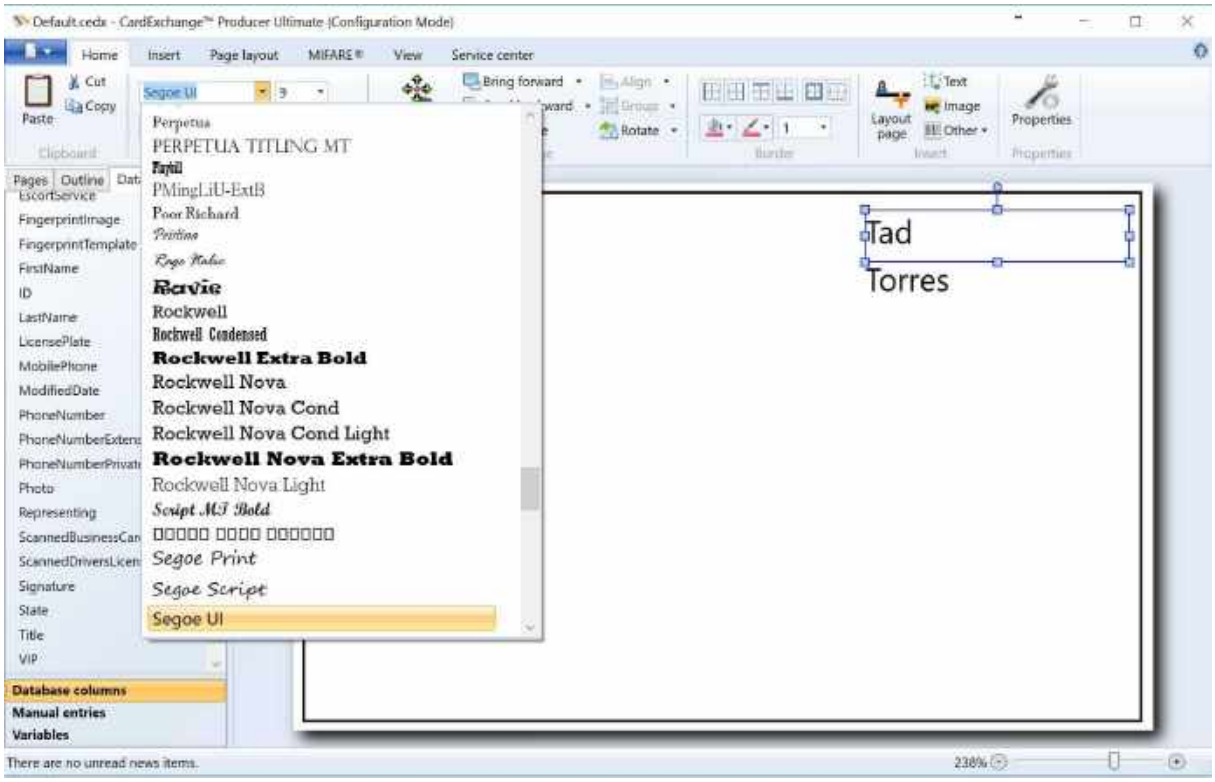
9.12.6 Formating Objects



In the Home tab you can select the font, font size and font color that you want to use for your object. For more information about formatting of objects, please see our "Properties[347]" section of this Help file.

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9.12.7 Arranging of Objects

CardExchange® Producer offers a lot of functionality to arrange your objects on the page. All the arranging functionality is available via the Arrange group in the Home tab or via the Context menu.

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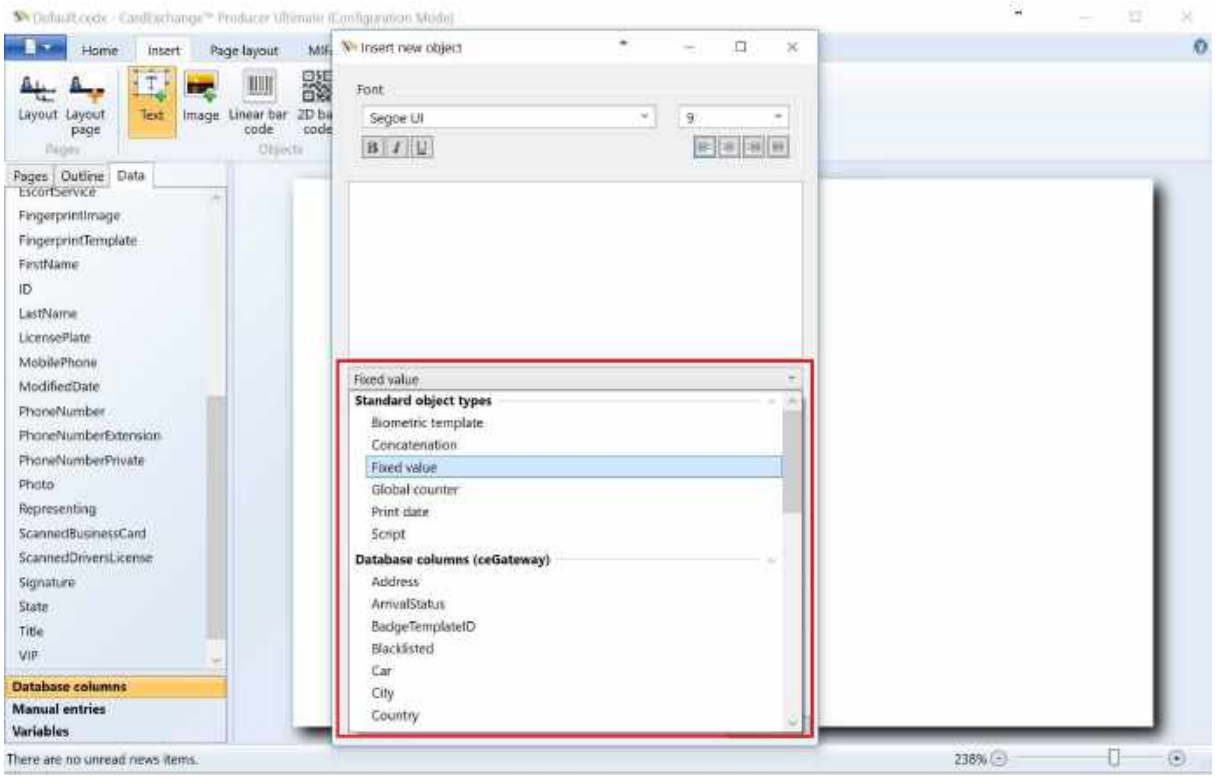
9.13 Standard Object Types



With exception for the Image object, CardExchange® Producer offers Standard Object Types. **Standard Object Types** is functionality that can be connected to the object. In this section we will inform you how to use these **Standard Objects Types**.

Standards Objects Types can be selected when adding a new object to your Page designer or via the Content 349 tab in the Properties 347 window.

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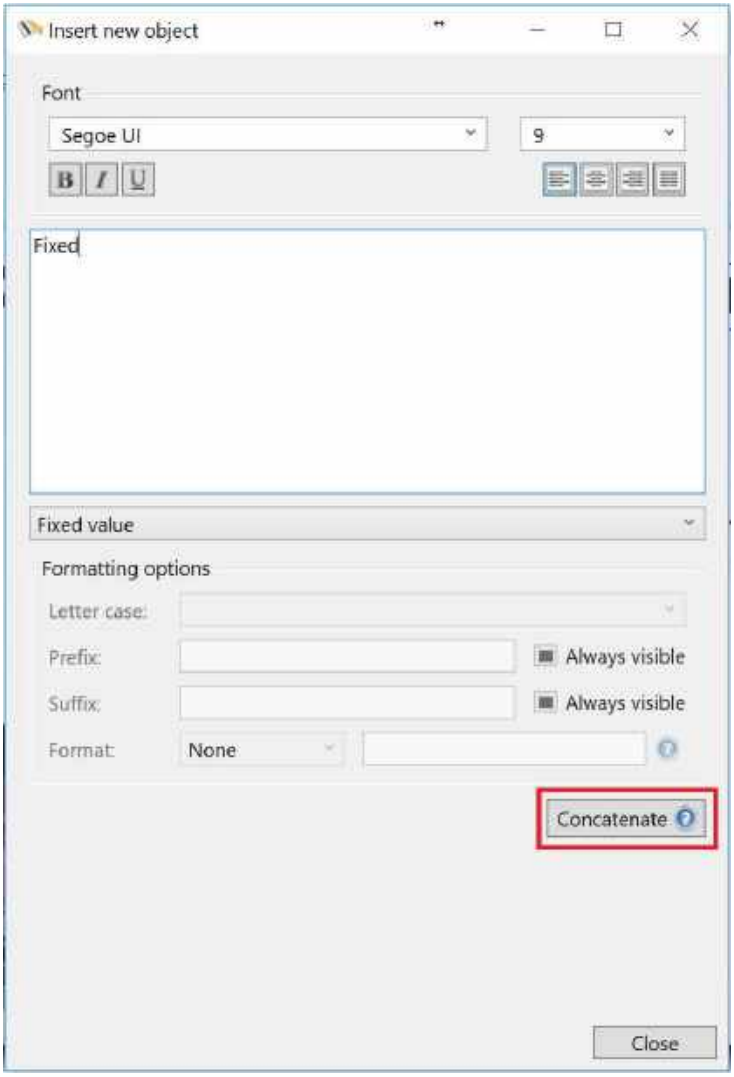
9.13.1 Concatenation



Concatenation is very powerful functionality offered in CardExchange® Producer. It offers you unlimited ways to present or store data.

In this example we are adding a new Text object 387 to our Page 384 design and we have it set to the default **Standard Object Type**, **Fixed Value**, and we enter a name into the text area, in this case "Fixed" Now we click on the **Concatenate** button under the formatting options.

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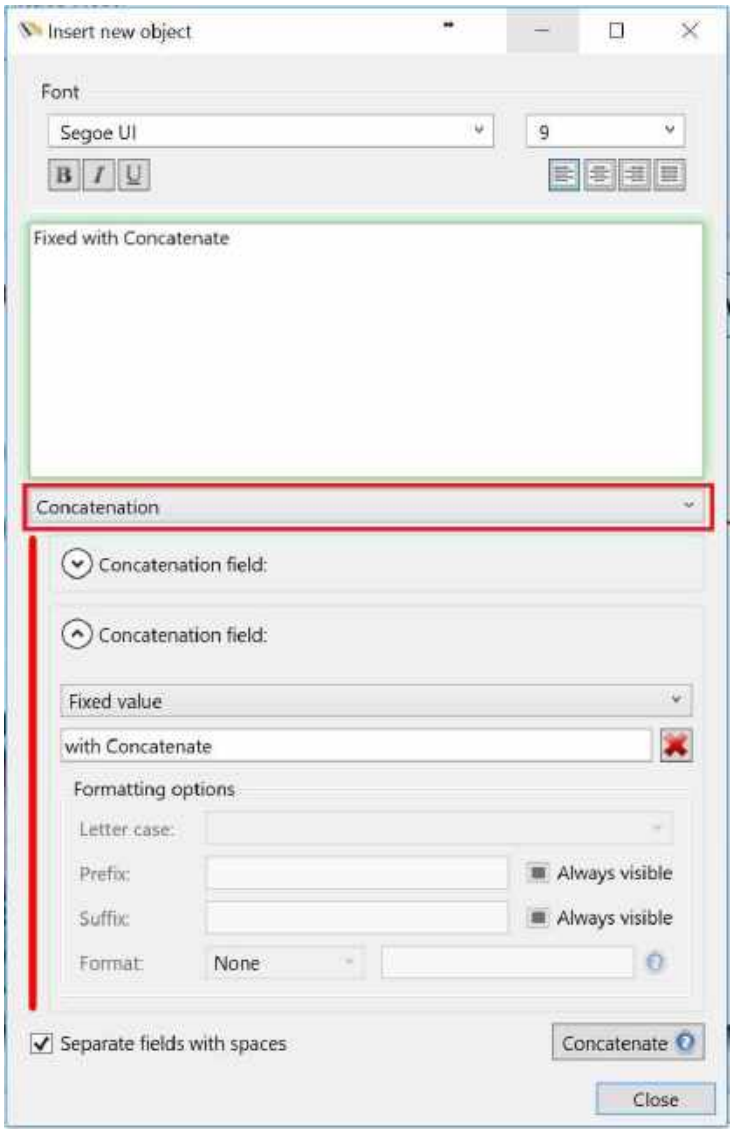

Now we get a new option to select a **Standard Object Type**, in this case, also a **Fixed Value** is used but this can be any **Standard Object Type** available.

Now you see that the **Standard Object Type** is changed from Fixed Value to **Concatenate** as indicated.

The **Concatenations** are divided by expandable tabs. When you click on the left down arrow it will open the selected one and close the previous opened:

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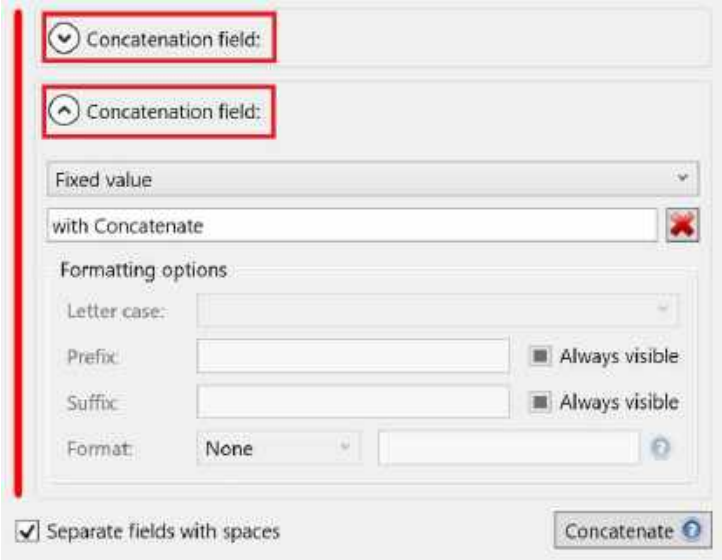

You also see a **red vertical** line on the left. This indicates the group of **Concatenations**. There are no limitations to the amount of **Concatenations** you can make. You can always change your **Concatenations** in the Properties 347 window at the Content 349 section.

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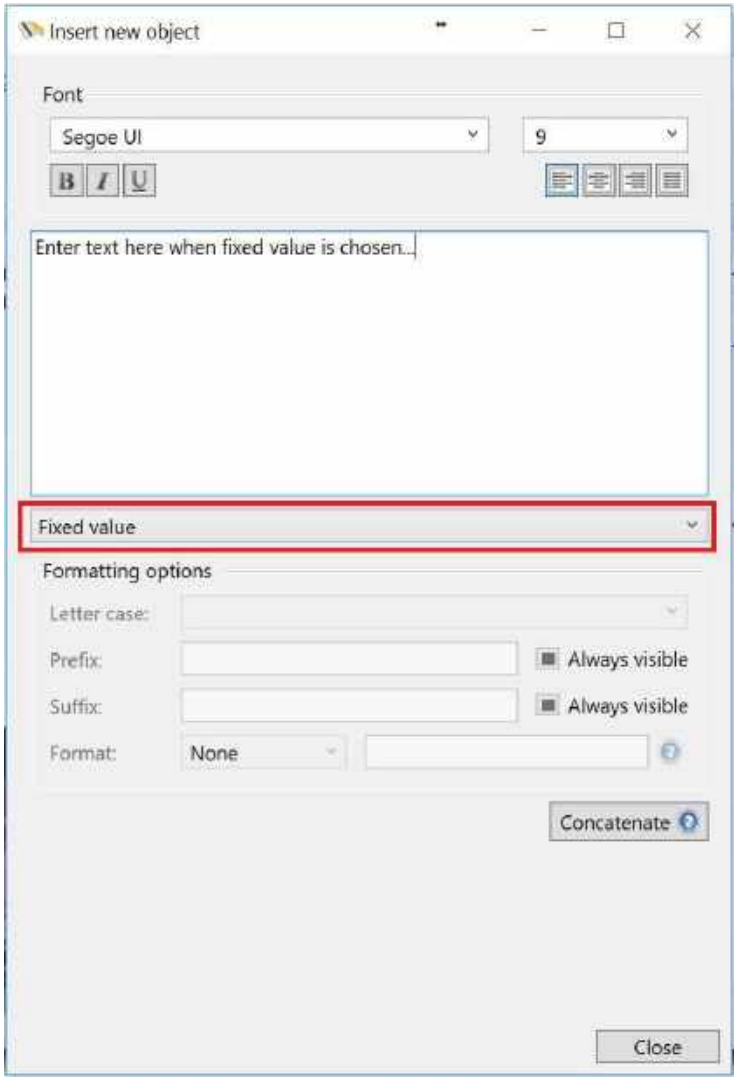
9.13.2 Fixed Value



Select **Fixed Value** from the **Standard Object Type** drop down menu, indicated with the **red rectangle** and enter the text into the text area.

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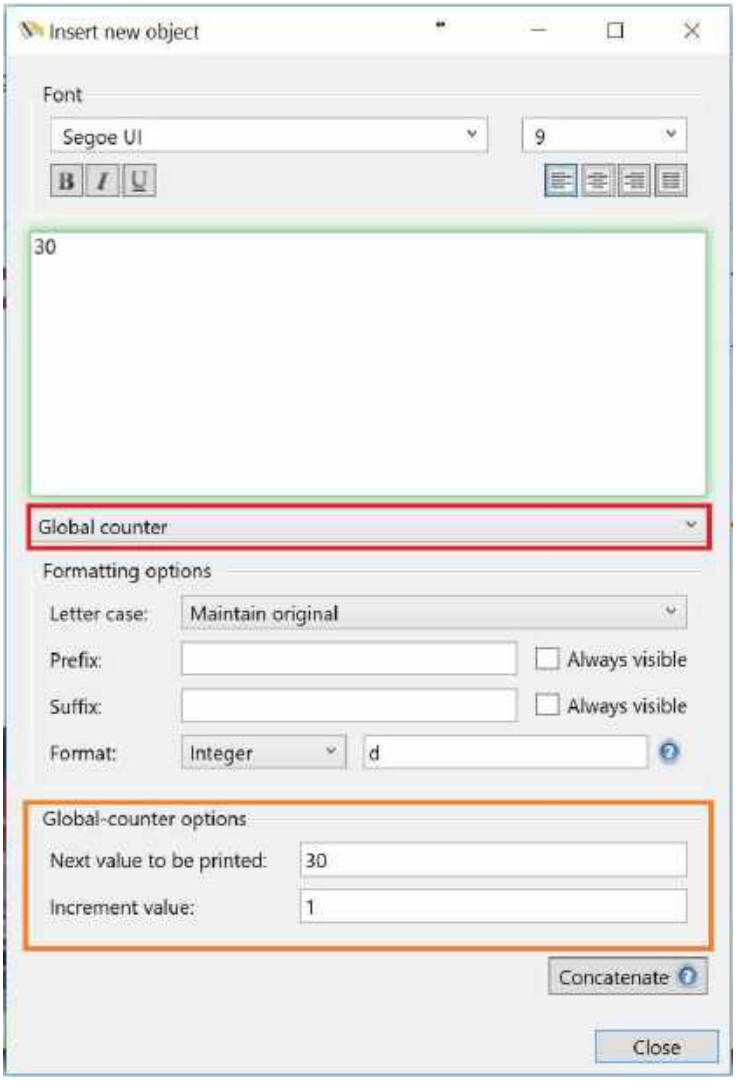
9.13.3 Global Counter



Select **Global Counter** from the **Standard Object Type** drop down menu, indicated with the **red rectangle** and set the **Global Counter** options in the group indicated with the **orange rectangle**. When using the **Global Counter**, you see that the text area is indicated with a **green rectangle**. This means that the value shown is generated based on the settings for the Global Counter and cannot be changed in the text area.

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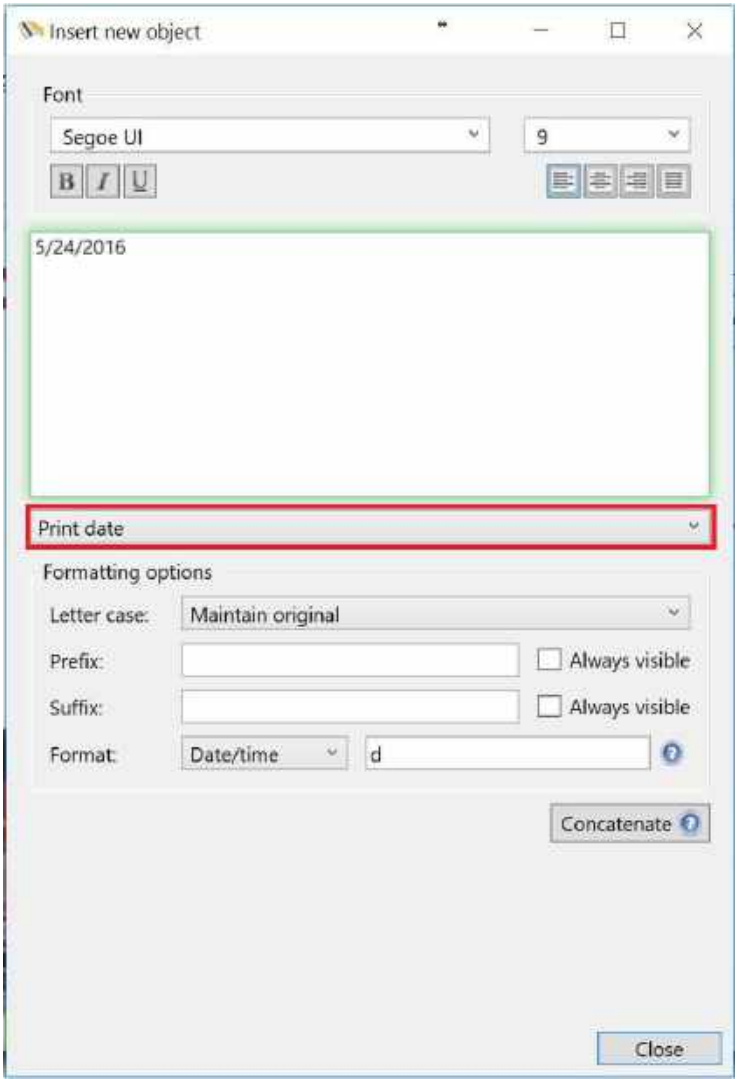
9.13.4 Print Date



Select **Print Date** from the **Standard Object Type** drop down menu, indicated with the **red rectangle** and it will directly present the date. You can also show the date and time or time only by setting the date format options. When using the **Print Date** you see that the text area is indicated with a **green rectangle**. This means that the value shown cannot be changed in the text area.

The date reflect the date and time as available on your computer.

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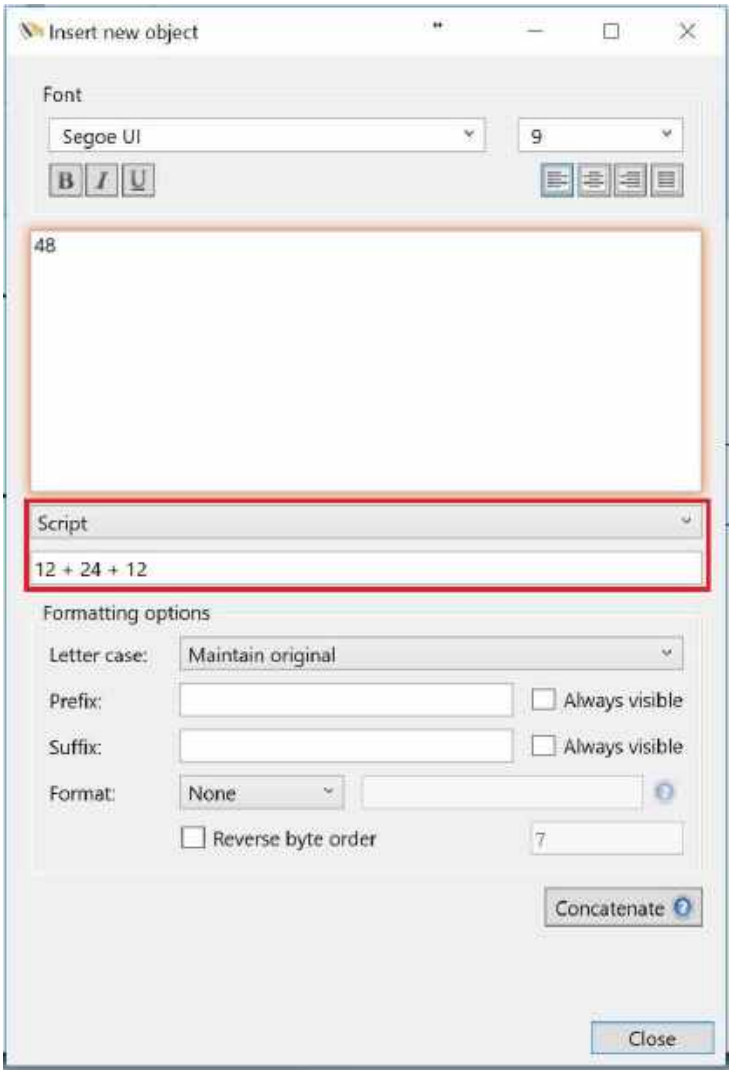
9.13.5 Script



Select **Script** from the **Standard Object Type** drop down menu, indicated with the **red rectangle** and enter the script in the text field under the drop down menu.

You will see that the text area is now indicated with a red/orange color which means that the value shown is calculated based on the script.

IMPORTANT! Scripting is only available in the Ultimate edition.

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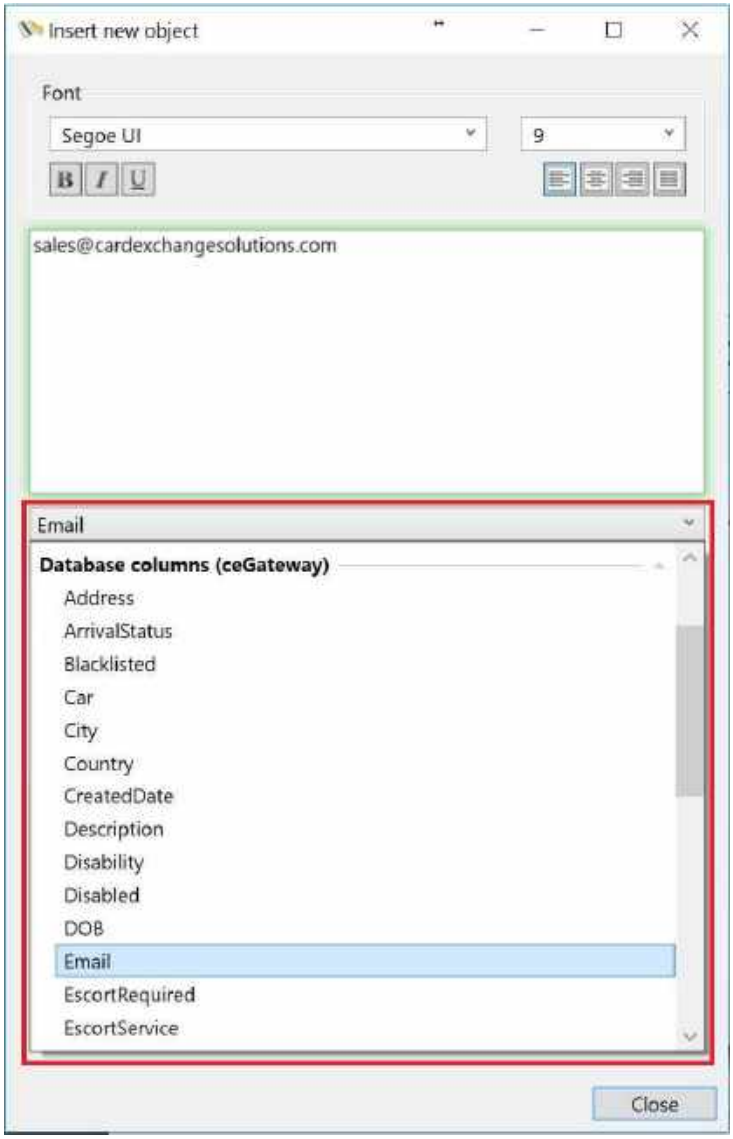
9.13.6 Database Columns



In the **Standard Object Type** drop down menu, all the database columns are available for selecting.

When selecting a database column from the list, you will see that the text area is indicated with a **green rectangle**. This means that the data shown is coming from the connected database and cannot be edited in the text area.

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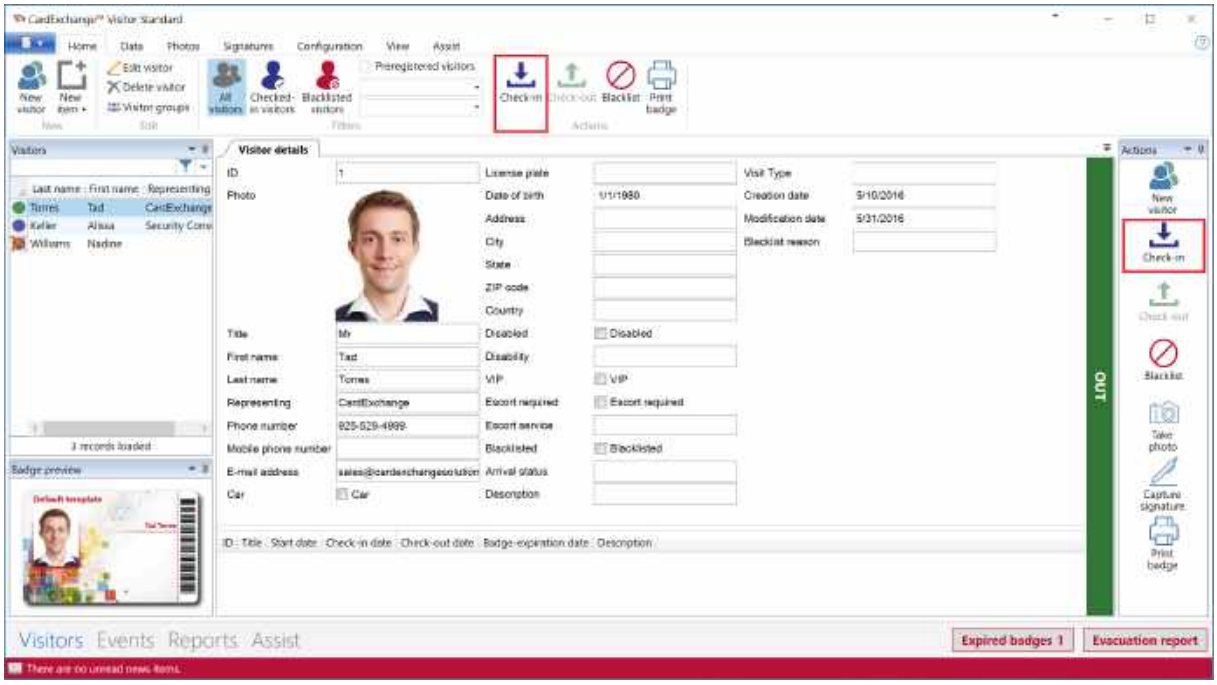
10 Checking-In



When checking on Check-in from either the Home tab or the Actions pane, CardExchange® Visitor will check to see if the visitor is either marked as a VIP or requiring an escort.

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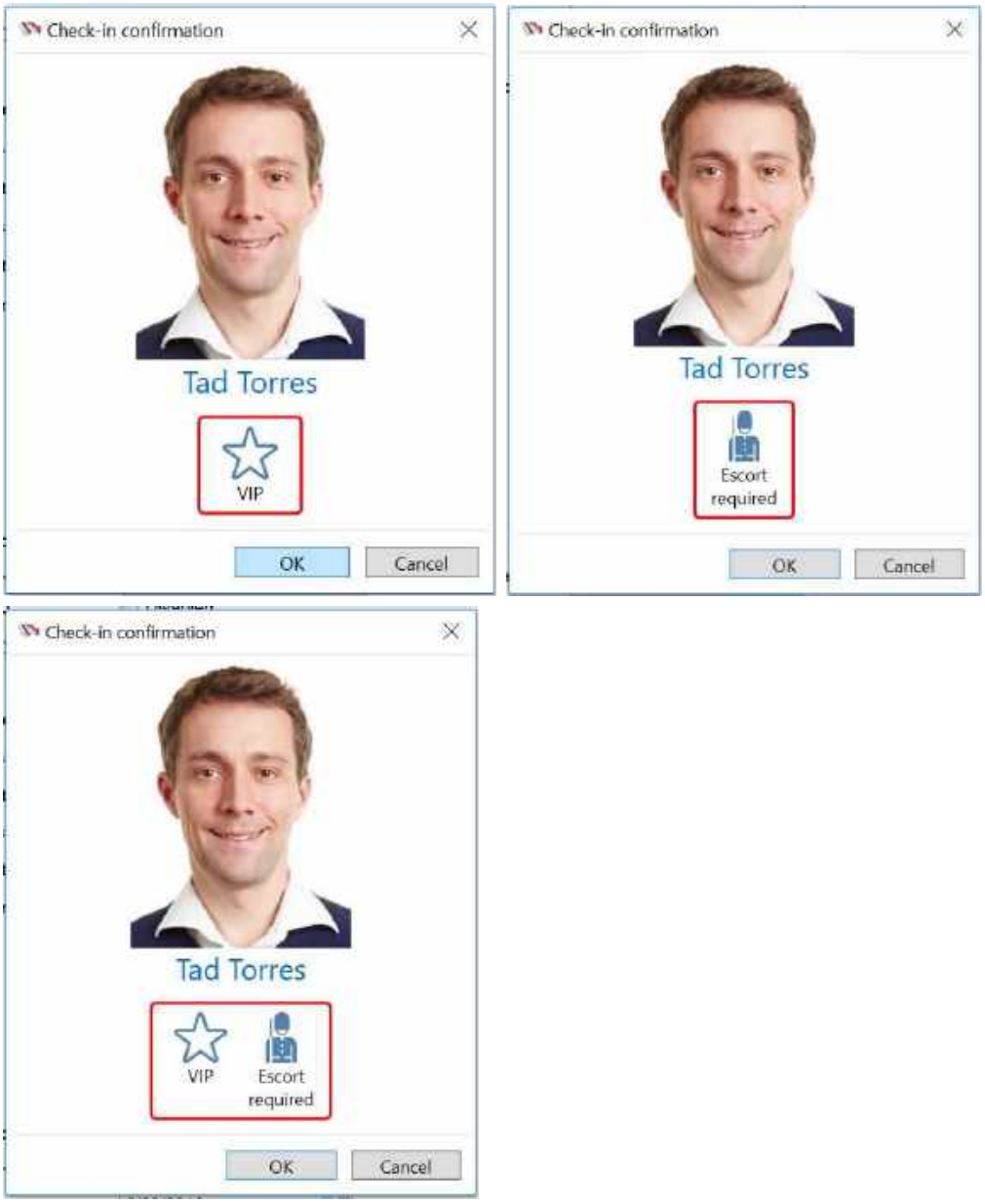

If either option is checked then the corresponding prompt above is displayed, or the prompt containing both if they are both checked.
You can then either click ok to continue, or cancel to arrange the escort before checking them in.

10.1 Visitor Screening

CardExchange® Visitor Business Edition is offering visitor screening via criminal and sex offender database systems of Amber Road and MK Data Services.

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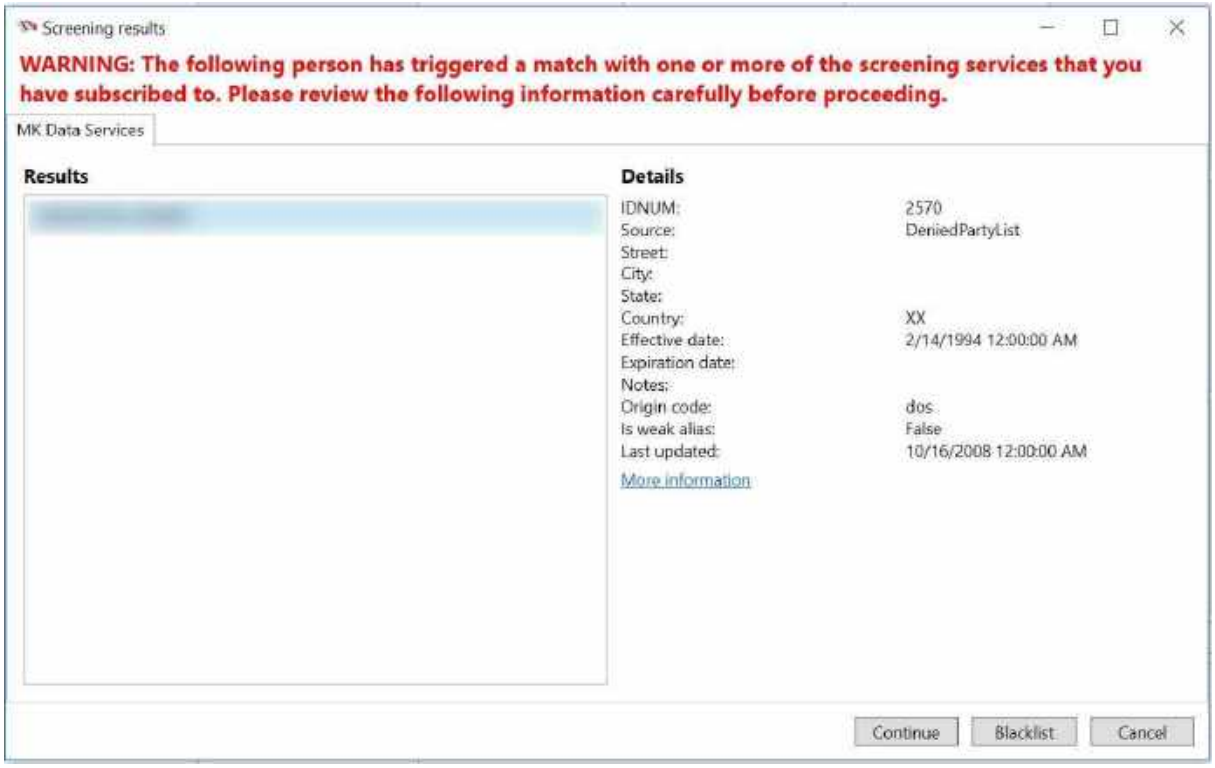
For details on configuring this please see the Visitor Screening 227 section of this manual.

Before a visitor is checked in, information of the visitor will be sent to the screening services and when a possible match is made, the window below will be show:



Clicking on more information will direct you to the website of the screening provider so you can log in and see any additional information that they may hold for that person.

If you choose to continue then you will see a warning asking if you wish to proceed, clicking yes will check the person in.

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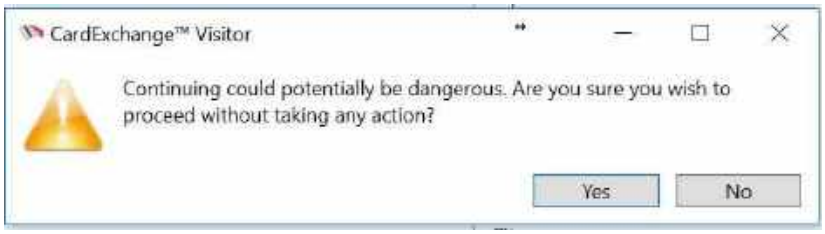

If you choose blacklist then the visitor will be added to the Blacklist of the visitor management system, you can enter a reason and confirm on the window that is shown.

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10.2 Document Signing

If you have added a document either to the event or as a required document then each visitor will need to agree to and sign the document at the time of check-in.
If a signature tablet is being used then the document can be digitally signed, otherwise it can be printed out to be physically signed.

Once the document has been either signed or printed, you can click on finish to complete the check-in.

All digitally signed documents are stored in the following location by default:
C:\Users\Public\Documents\VisitorExchange\Documents\

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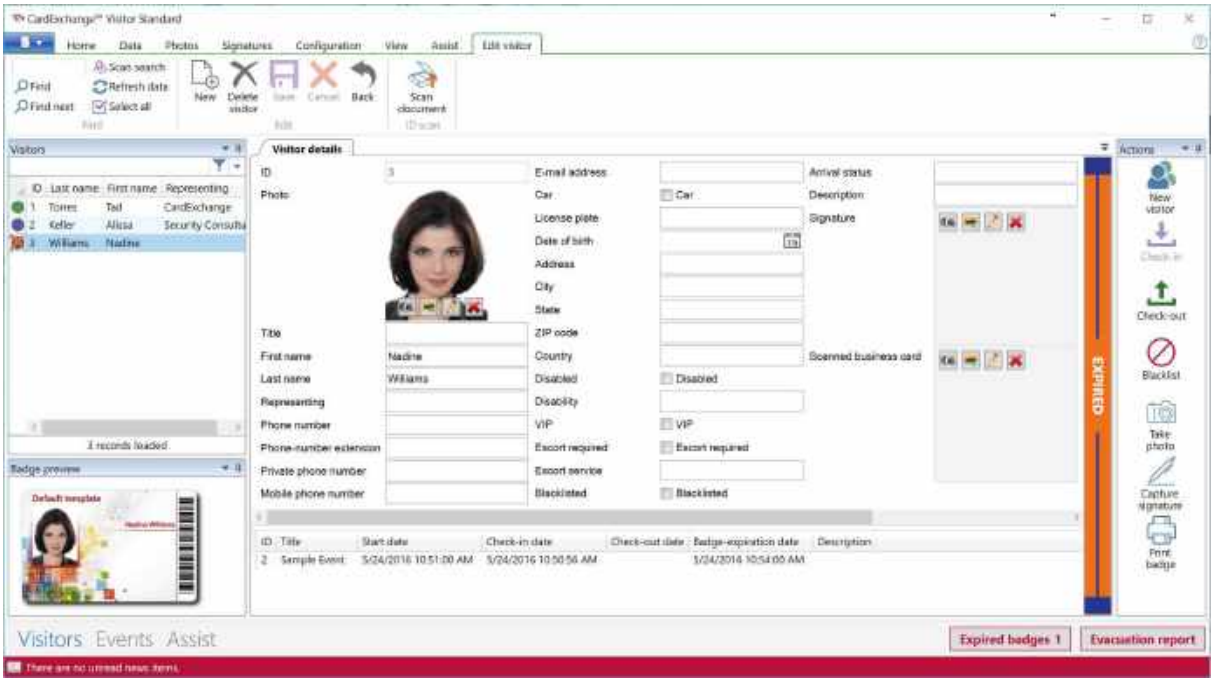
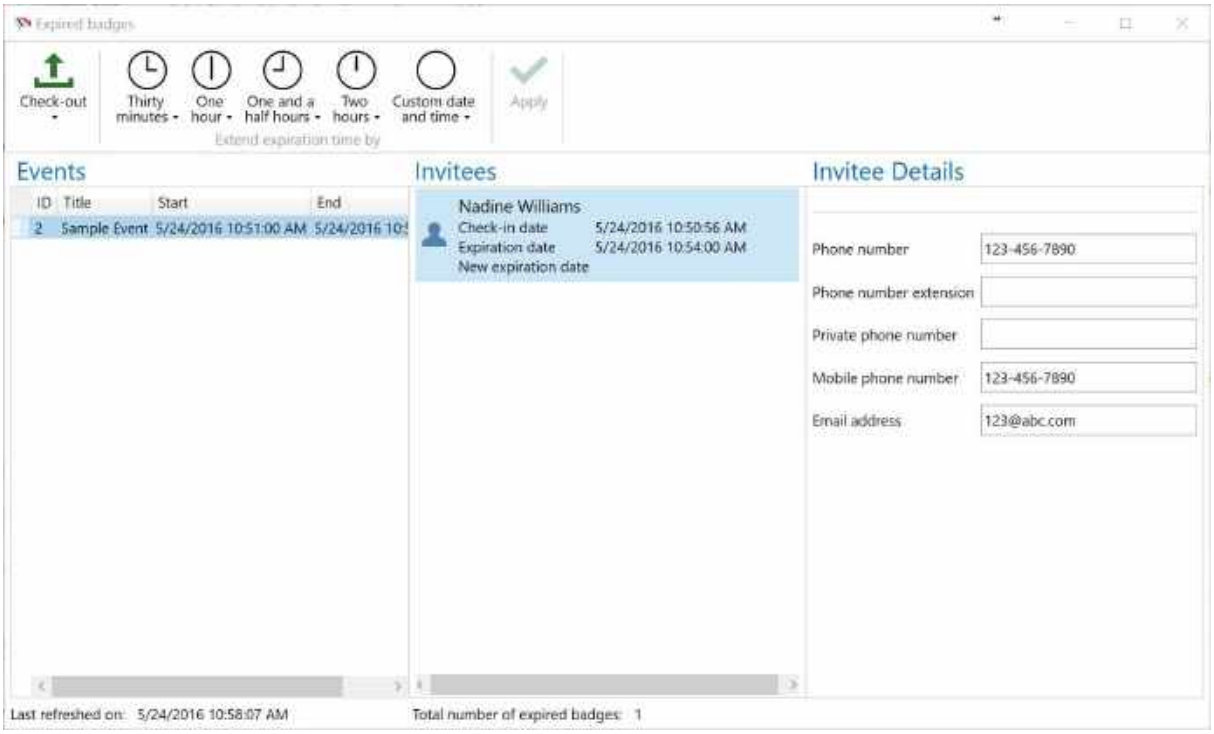
11 Expired Badges



If Expired badges are shown in the bottom right of the main window, you can click on the button to give you a list of all the expired badges.



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Here you can select one or more visitors and either check them out if you know that they have left, or select a time period to extend they stay by.
Some details are also shown for the invitee so that you can try to contact them if needed.
Once you are done click on Apply to save the changes.

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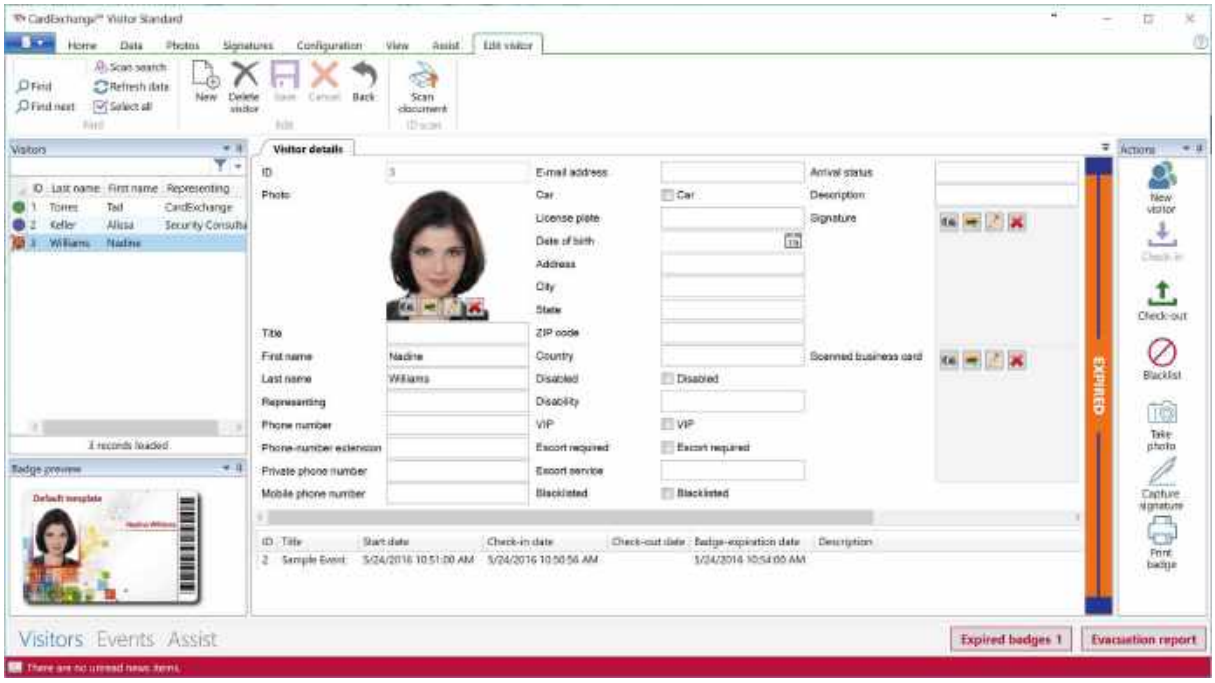
12 Evacuation Report



In the event of an emergency you can click on Evacuation report to quickly print out a report of all visitors currently checked-in.
This button is always shown in the bottom right of all views to allow quick access to it.

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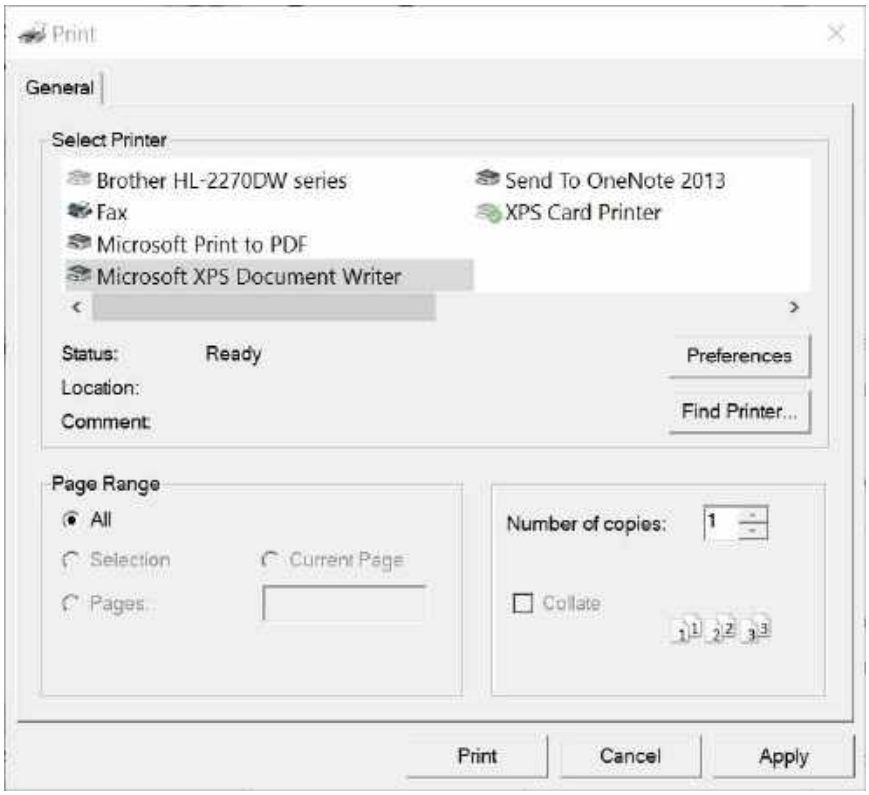

Clicking the Evacuation report button will either prompt you with the print dialog window for you to select the desired printer, or if you have the option selected to email the report it will will send an email instead to the specified email address.
You can configure the email settings for the evacuation report here 215.

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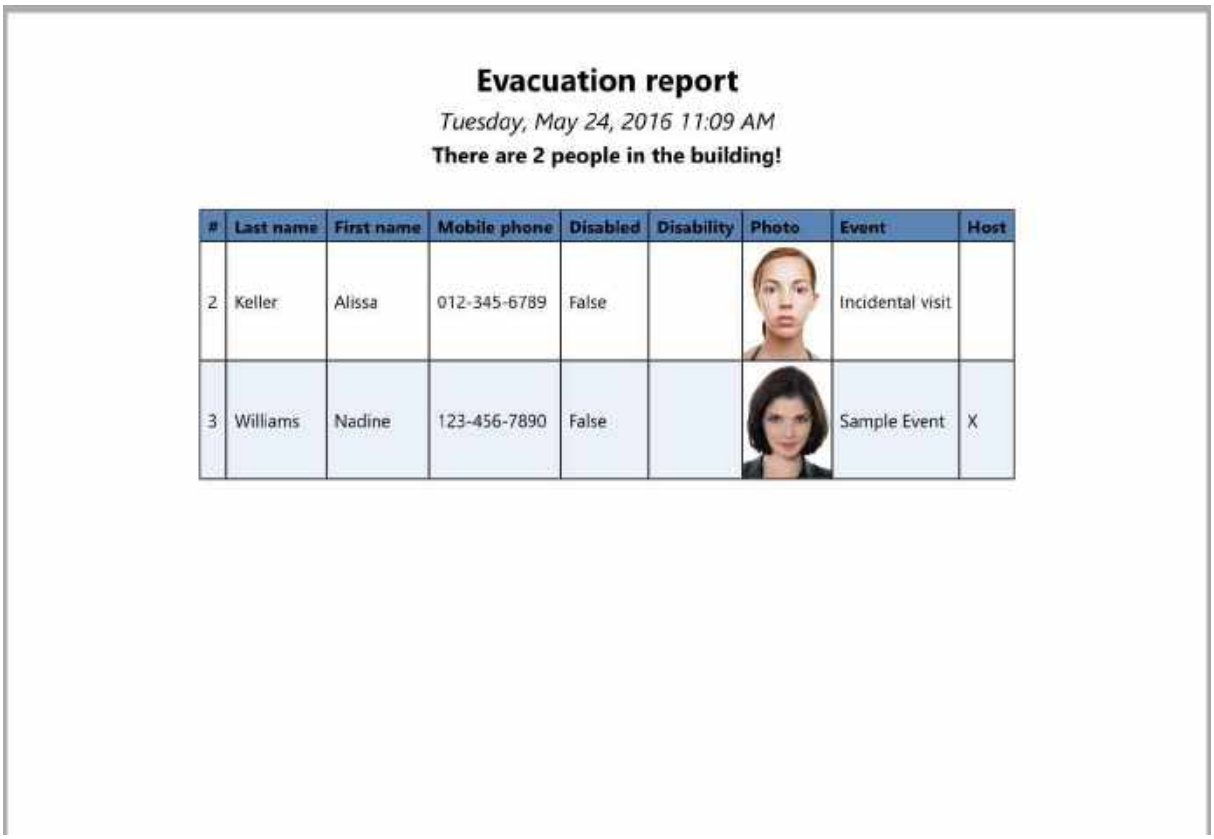

Evacuation report

Tuesday, May 24, 2016 11:09 AM

There are 2 people in the building!

#	Last name	First name	Mobile phone	Disabled	Disability	Photo	Event	Host
2	Keller	Alissa	012-345-6789	False			Incidental visit	
3	Williams	Nadine	123-456-7890	False			Sample Event	X

The Evacuation report shows the key information for each person currently checked-in, this includes the following.

First name	Shows the persons first name
Last name	Shows the persons last name
Mobile phone	Shows the persons mobile phone number
Disabled	Shows whether the person is disabled or not
Disability	If the person is disabled then their disability will be shown
Photo	Shows the persons photo
Event	Shows the event that the person is attending, otherwise it will show Incidental visit
Host	Shows whether the person is the host of an event or not

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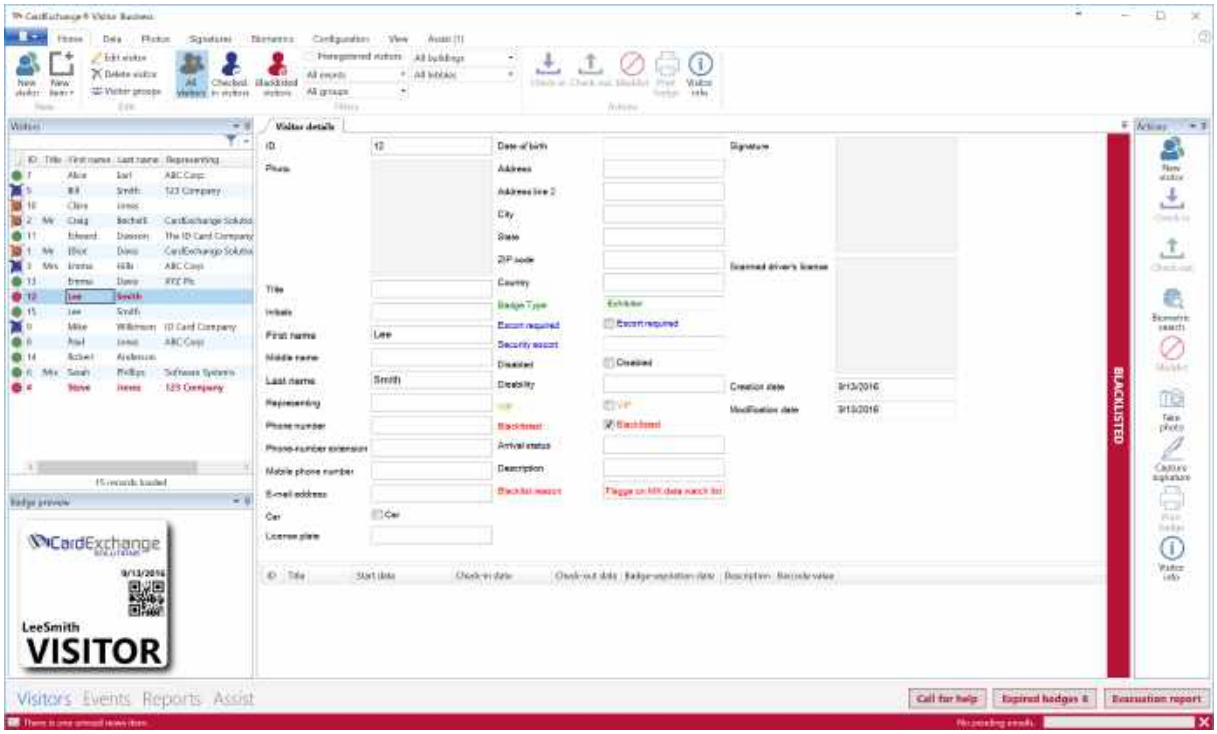
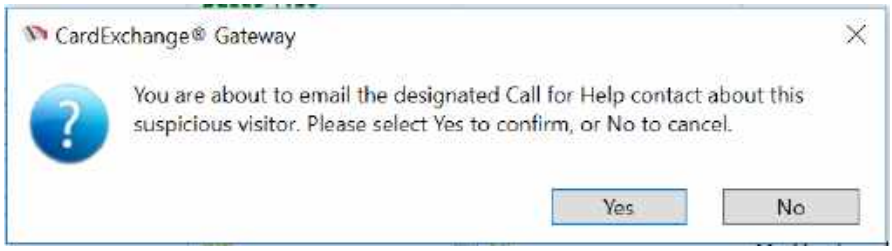
13 Call For Help



In the main interface there is a Call for help button that becomes available whenever a blacklisted visitor is selected.



Clicking on this button sends an email to a designated address containing the name(s) and location(s) of the blacklisted visitor(s).
You can configure the call for help email option here 220.

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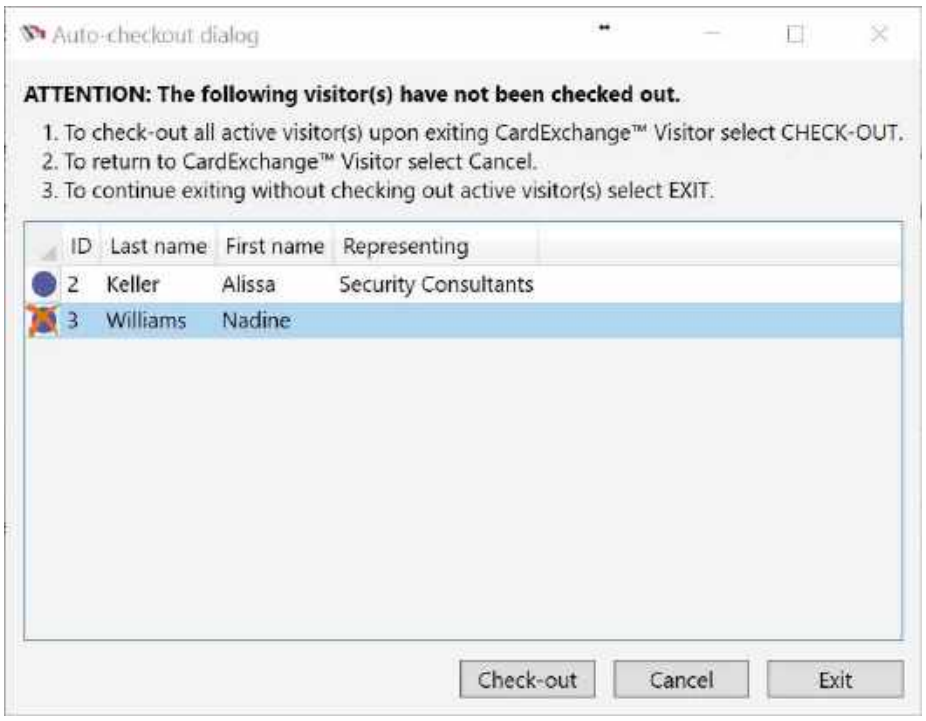
14 Auto-checkout



When closing CardExchange® Visitor you have the option to automatically check-out all active visitors, you can also exit without checking them out or return to the main window.

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15 KIOSK Client

Starting from the CardExchange® Visitor Business edition it is also possible to use the CardExchange® Visitor KIOSK Client. This is a stand-alone KIOSK application for self check-in and check-out by visitors.

15.1 Other

Enter topic text here.

15.2 Check-In

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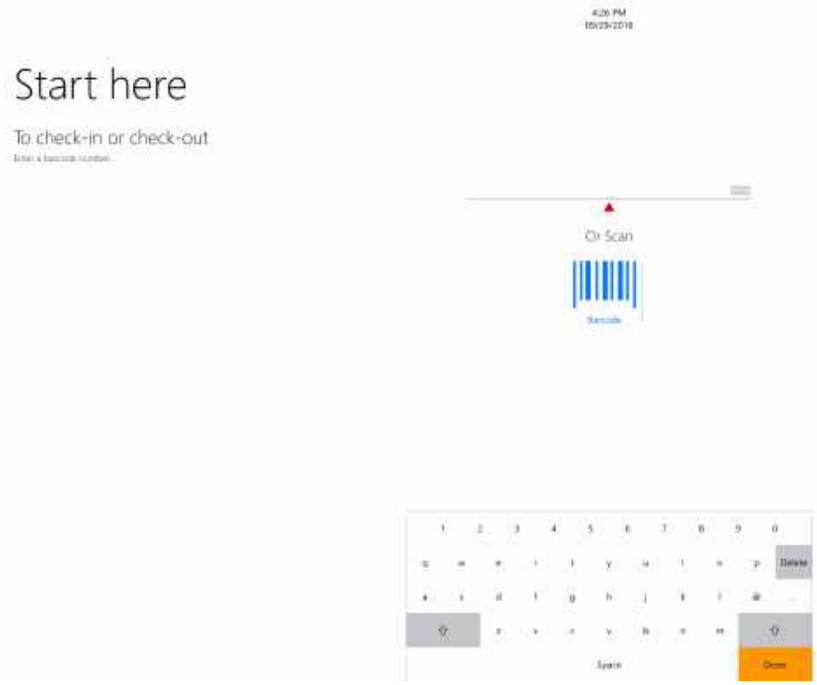
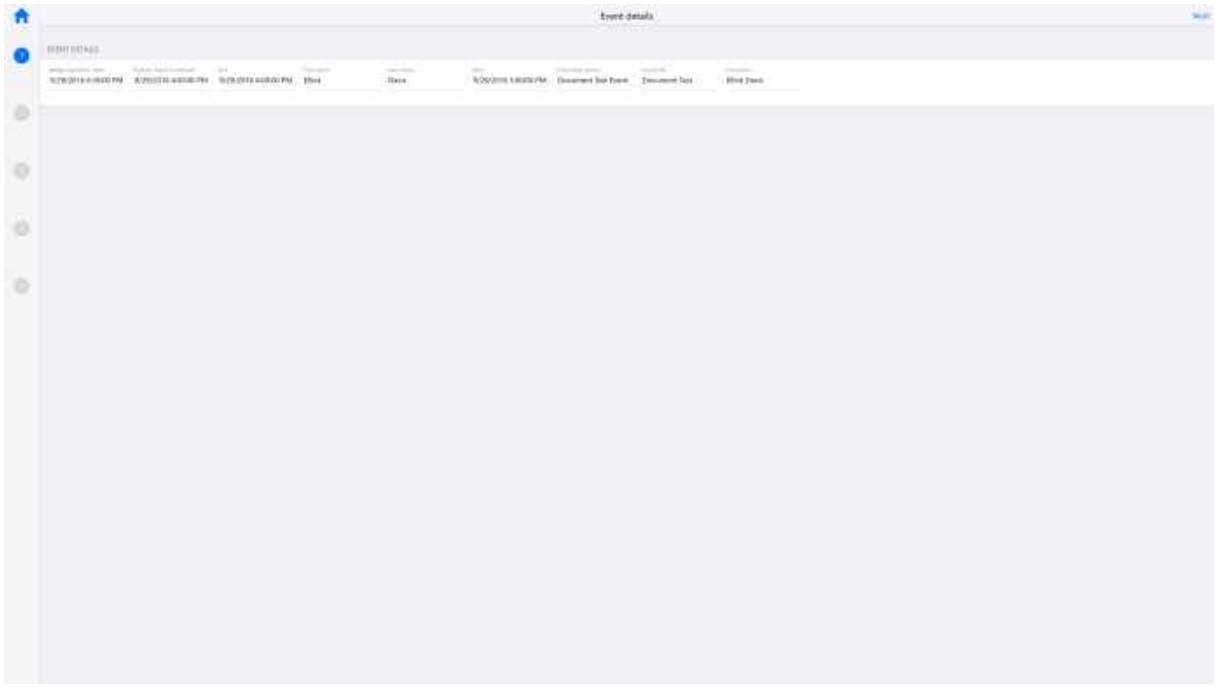


On the main screen you have the option to scan the barcode from the event confirmation email, or if you cannot scan this you can enter the barcode number manually.



If a valid barcode number is either scanned or entered, the details of the event are displayed on the screen.

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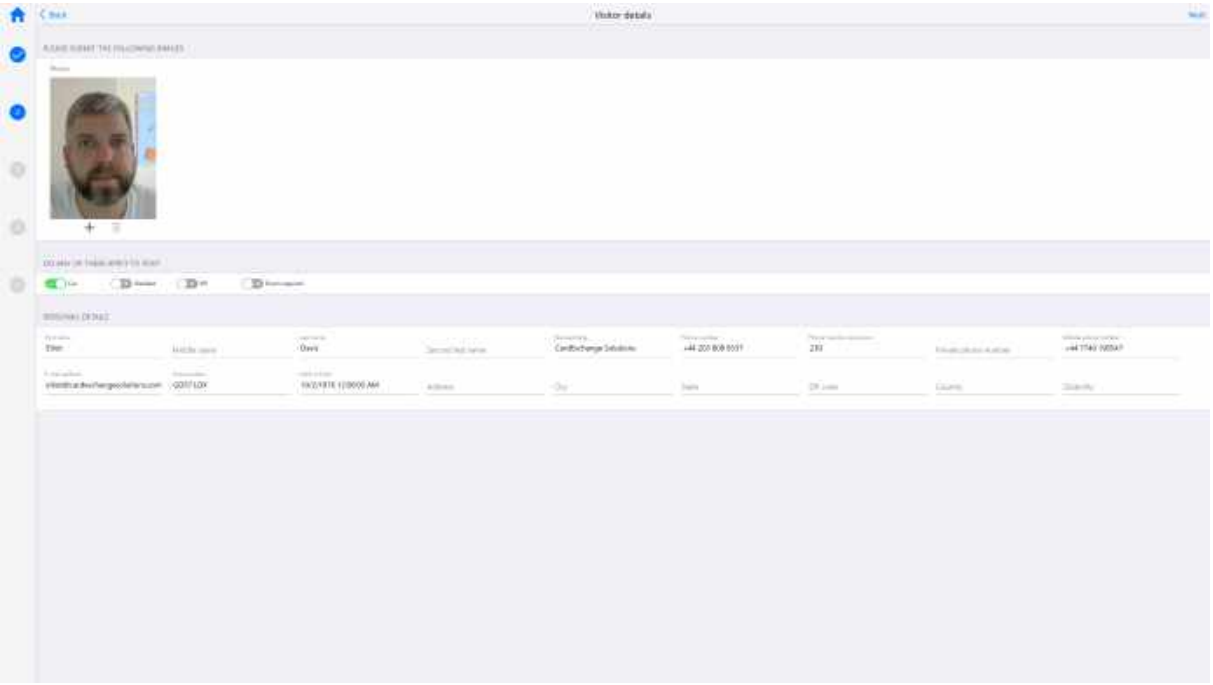

Clicking on next will bring up the visitor details screen, depending on the configuration you can allow visitors to change incorrect details and take/update the photo.

The next screen displays any documents that the visitors are required to sign before checking in, if it is a touchscreen kiosk you can sign directly on the screen in the section under the document.

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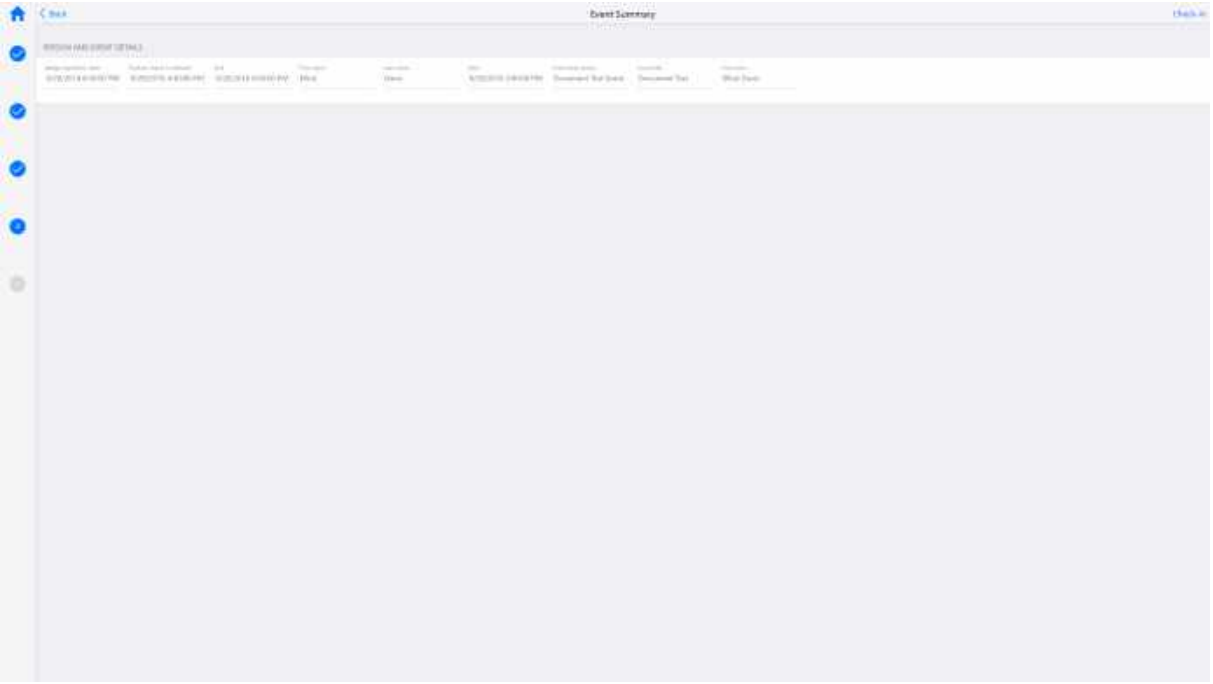
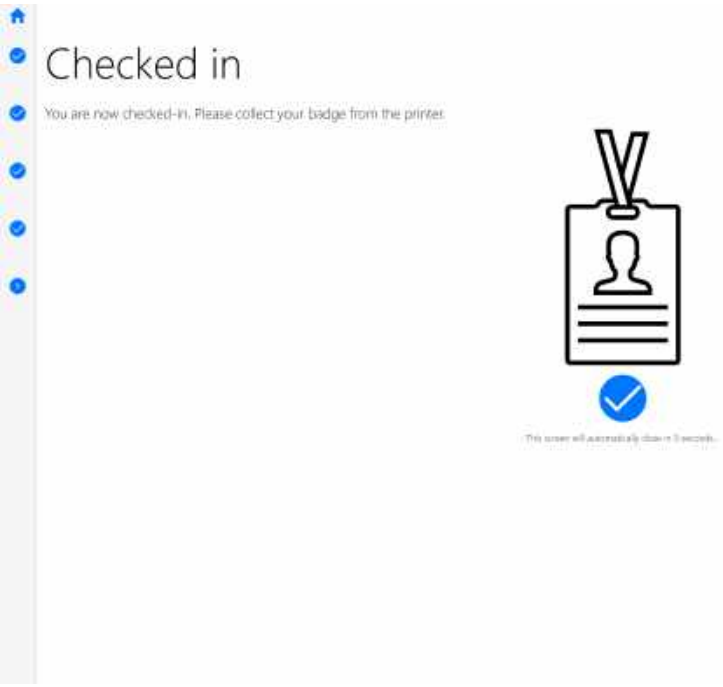


You will then see a summary of the event you are checking in for, to complete the check-in just click on Check-in.



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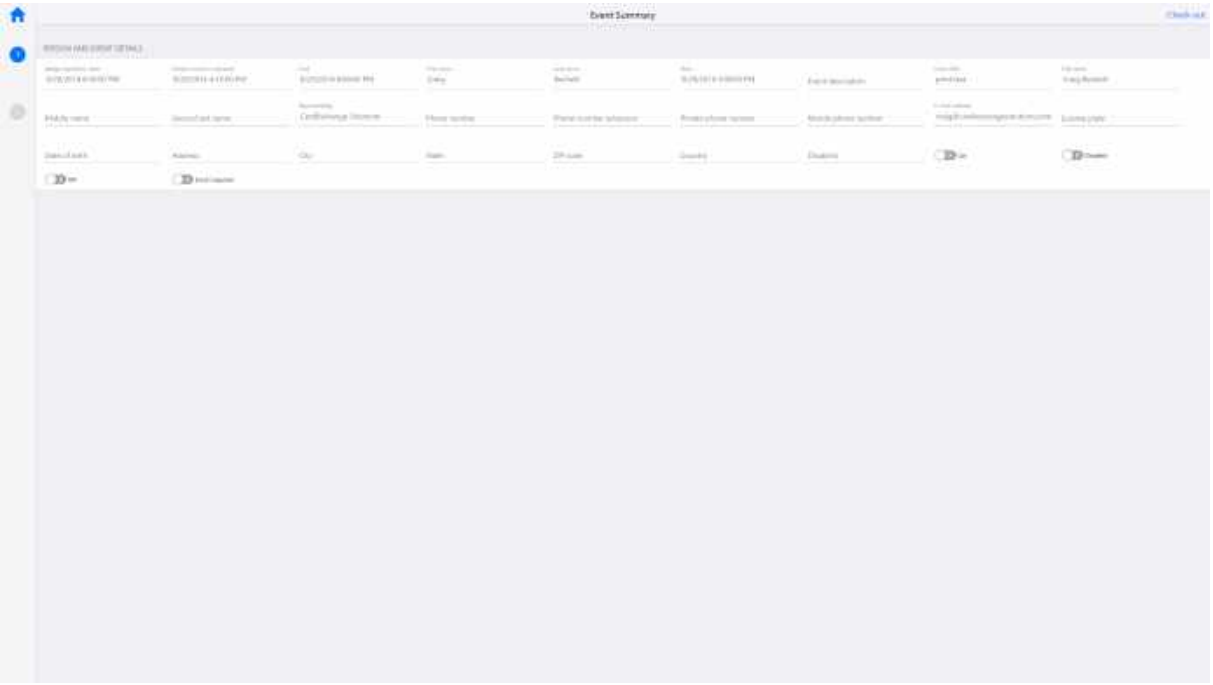
The visitor badge will be printed to the selected printer for the visitor to collect, also if the event host has an email address configured then they will receive an email notification that the visitor has checked in.

15.3 Check-Out



When scanning a barcode on the main screen for a visitor that has already checked-in, they will be presented with the check-out screen displaying a summary of their event. Clicking Check-out will check them out of the building.

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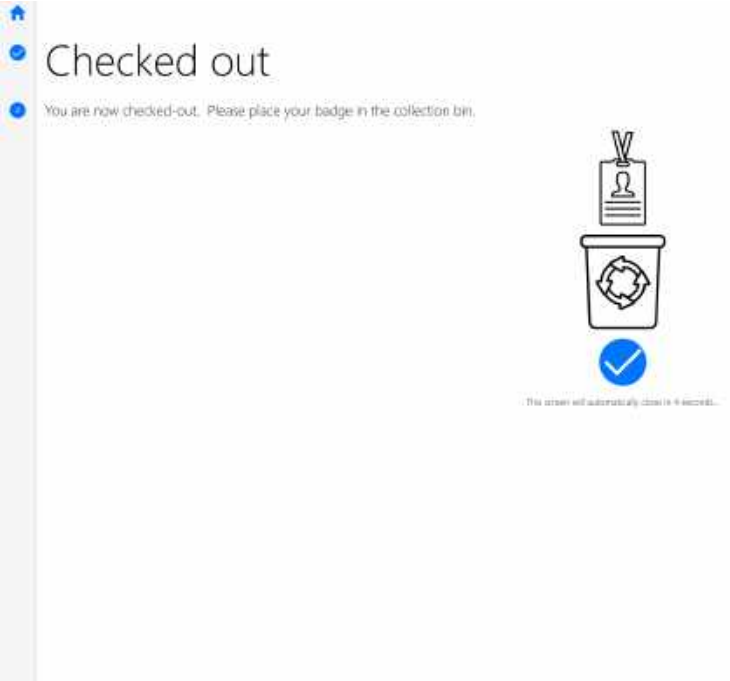
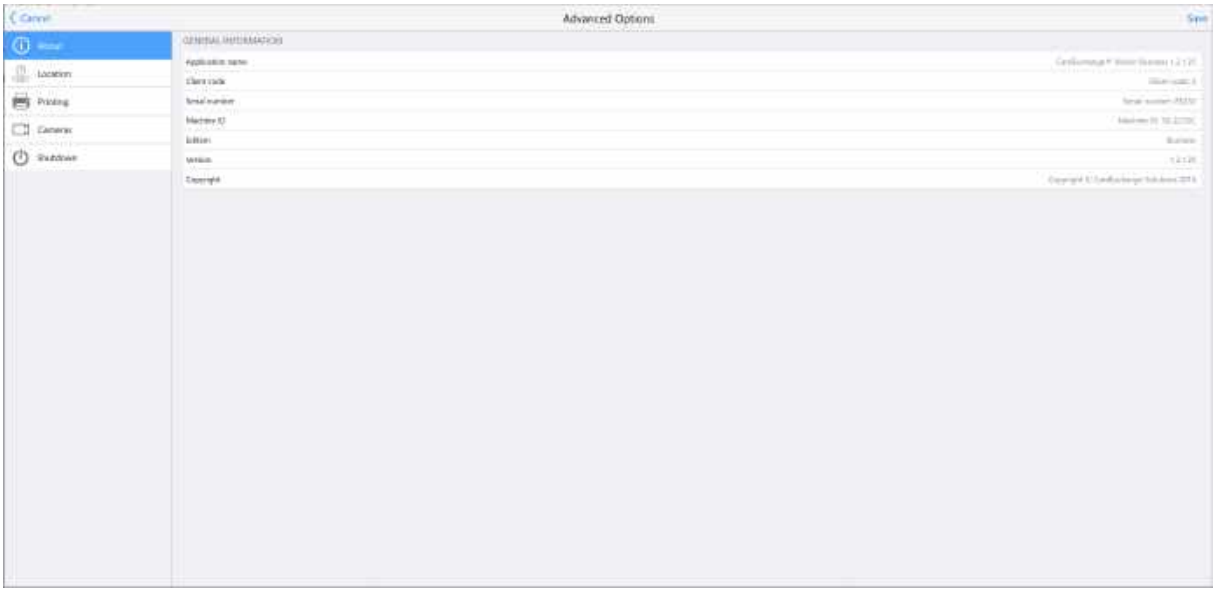


15.4 Configuration



To enter the advanced options you need to enter the administrator password on the main screen, by default this is Admin and can be changed in the general kiosk settings 225 which you can access from the advanced options window in the main CardExchange® Visitor application.
Under the About tab you can see all the detailed information regarding the installed version, Serial number, MachineID, Edition etc...

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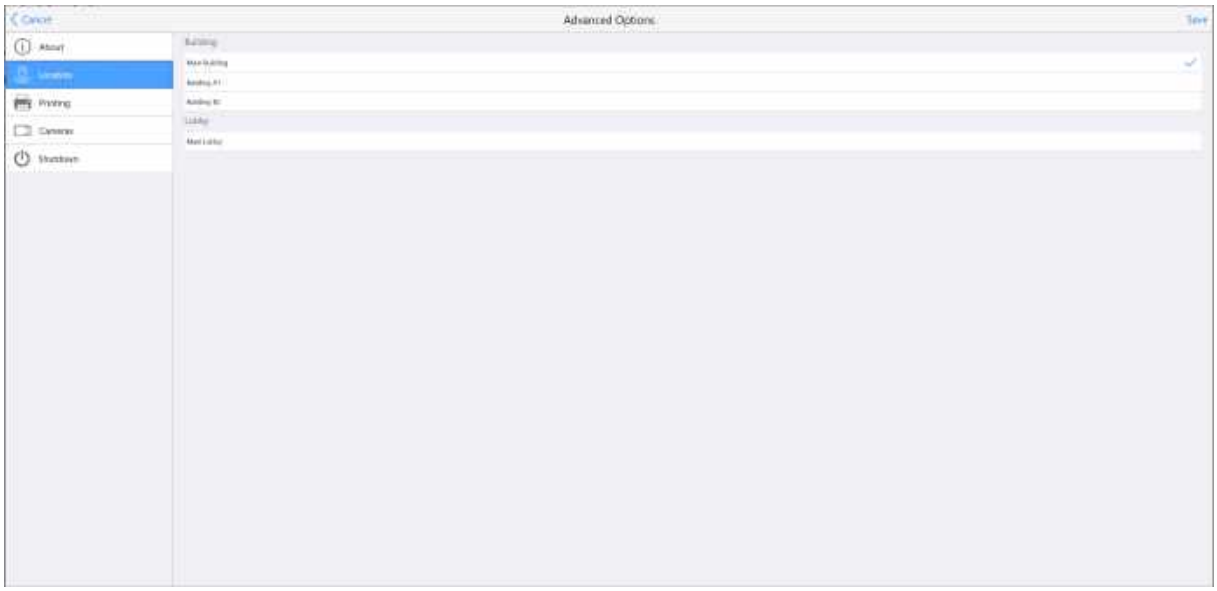
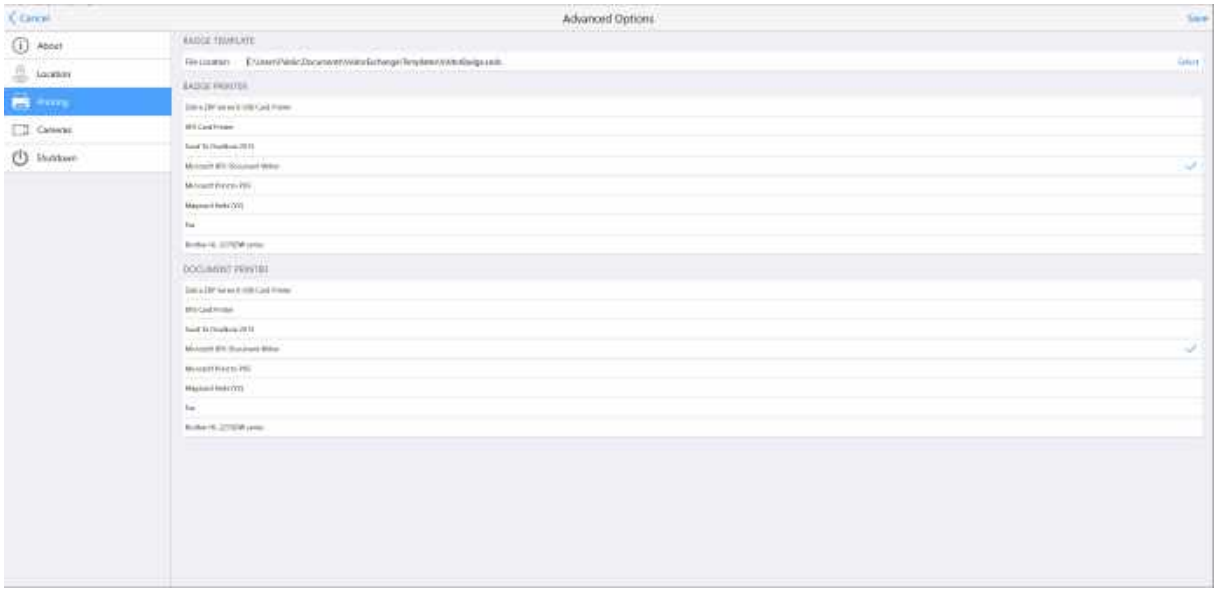


From the location tab you can select the location of the Kiosk client, you can select the current building and lobby.



Under the printing tab you can select the location for the badge template to be used, the badge printer and the document printer.

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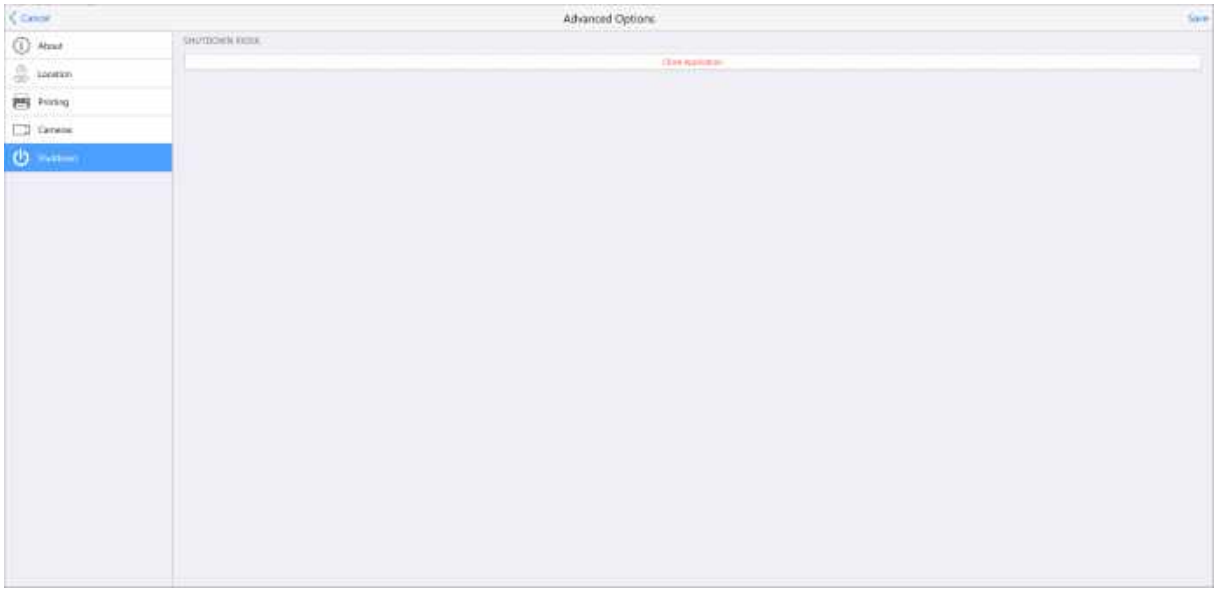
Under the cameras tab you can select the desired camera from the available options.



And you can shutdown the Kiosk client from the shutdown tab.

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16 Other

Enter topic text here.

16.1 Drivers

CardExchange® Visitor supports a lot of external devices like ID Card Scanners, Biometric, as well specific database connections. Adding all these drivers to the installer will create a monster download and because these drivers are not used in so many situations, we have chosen to provide these drivers on DVD and you can download them via our website by CLICKING HERE.

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We provide different types of drivers and all the available drivers are explained below. By simply executing the drivers, they will be installed on your system:

- **USB Dongle** - When you are using your license in combination with a USB dongle, the driver needs to be installed before you activate your CardExchange® license.
- **ID CardScan** - We support the Scanshell ID scanner. You will have to install this driver first before you can use this scanner. CardExchange® will check and indicate if the driver is installed or not.
- **DigitalPersona** - We support two devices that are using the same driver, this is the DigitalPersona and the Topaz. For both scanners one of these drivers needs to be installed. Make sure that you install the correct version, one is for 32 bit OS and one is for 64 bit OS.
- **Signotec Signature Pad** - We support Signotec and Topaz signature pads, the driver needs to be installed before you are able to use them.

16.2 Using License Dongle

If you have chosen to use a USB dongle with your license, it is important that the driver of this dongle is installed first before connecting this dongle to your system and activating the license.

In the main page of the Auto Play Menu you can find the menu option Drivers. When you select this menu item you will enter the driver page. Now click on the USB Dongle button to execute the installer:

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When the installer is started, click on Next to proceed:

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If you agree to the terms of the license agreement, please do select the corresponding option and proceed with Next. If you decline these terms, when selecting the installation will stop and the wizard will be closed after clicking on Finish:

Select Complete as Setup Type and click on Next to Proceed:

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Now you are ready to install the dongle driver on your system. Click Install to proceed:

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To allow access to the server, the firewall has to be modified to allow this. You can always do this manual later, select No to do so. We advice to let the installer do the modifications to the firewall as that guarantees the correct working of the dongle with the server. Click Yes to proceed:

When the installation is successful you can click on Finish to close the installation wizard. Now you can insert the dongle into a free USB port of your system and it will automatically install the driver.

16.3 License Manager Troubleshooting

As is the case with all installation procedures, it is also possible that CardExchange® Visitor Network License edition doesn't obtain a license from the License Manager successfully. This will almost always result in the error message "All licenses are in use. Please try again later." Normally, this message means exactly what it says and you probably need to purchase additional licenses. But if you get the message when there are available licenses, there is probably something else going on.

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You should check with the WlmAdmin tool on the server whether there are valid licenses in the License Manager. If that is not the case, you have to check whether the machine ID has changed (for example because the dongle has been removed or the network card has been changed). Otherwise, the firewall is the most likely cause.

Here are some other suggestions:

- The Sentinel RMS License Manager service is not running on the server.
- The Sentinel RMS License Manager service is running, but no valid license has been loaded.
- The CardExchange.Gateway.exe.config file of the client does not point to the correct server name.
- The firewall is blocking the communication, either on the client or on the server.
- The CardExchange® Visitor version you are running does not match the license codes.
- The license file was not created.
- The environment variable did not contain the correct path, did not have sufficient admin rights or did not include the full file name.

When changing configuration settings, it is often needed to restart the License Manager service.
This is done in the Computer Management window via the Services node. The service is called Sentinel RMS License Manager.

16.4 CardExchange® Visitor Database Logging

Within the configuration file is a commented out section as shown below:

```
  <entityFramework>
    <defaultConnectionFactory
type="System.Data.Entity.Infrastructure.SqlConnectionFactory, EntityFramework" />
    <providers>
      <provider invariantName="System.Data.SqlClient"
type="System.Data.Entity.SqlServer.SqlProviderServices, EntityFramework.SqlServer" />
      <provider invariantName="System.Data.SQLite.EF6"
type="System.Data.SQLite.EF6.SQLiteProviderServices, System.Data.SQLite.EF6" />
      <provider invariantName="MySql.Data.MySqlClient"
type="MySql.Data.MySqlClient.MySqlProviderServices, MySql.Data.Entity.EF6" />
    </providers>
```

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```
    <!--<interceptors>
      <interceptor type="System.Data.Entity.Infrastructure.Interception.DatabaseLogger,
EntityFramework">
        <parameters>
          <parameter value="C:
\Users\Public\Documents\VisitorExchange\VisitorExchange.log"/>
        </parameters>
      </interceptor>
    </interceptors>-->
  </entityFramework>
```

Uncommenting this section will cause all database queries to be logged to the specified file. CardExchange® Visitor produces a lot of SQL queries so database logging is disabled by default, but if there are any issues you can enable logging to help identify the problem.

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16.5 Secure Lock Down

When you are using the CardExchange® Visitor KIOSK client, in a lot of cases these applications will run at locations where you have not a direct view on the visitors attending. To ensure that visitors are not doing unplanned things with the KIOSK, we advice to use an application to secure the KIOSK against closing down, entering the Windows menu, accessing information, etc.

We therefore strongly advice to use Secure Lock down application from Inteset and a 30 day trial edition is available on this CD. We have tested the Standard edition and for $ 19,95 your KIOSK is completely safe and secured.

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For more information, please visit their website:

http://www.inteset.com/secure-lockdown-standard-edition.html

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