

# **CardExchange® 9 Quick Install Guide**

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# 1 Introduction



Thank you for choosing CardExchange® as your ID card production software, we appreciate your business.

In this Quick Install manual we will explain how to install, activate, and register CardExchange® on your system.

You have received a CardExchange® DVD box or you have downloaded the CardExchange® Trial version from the [CardExchangeSolutions.com](http://CardExchangeSolutions.com) website.

If you have received a CardExchange® DVD box from your CardExchange® reseller you need to insert the CD into your available drive. Normally the CD menu will automatically start, if not, just explore the CD content and start the **Autorun.exe** which can be found in the root of the CD. When the CD menu is started you select the preferred language and you will enter the Main Menu. In the **Main Menu** you click on CardExchange® which will bring you to the **CardExchange® Menu**. Click here on Install CardExchange® to start the installation procedure. Now follow the process explained in the [Installing CardExchange®](#) section of this manual.

If you have downloaded our CardExchange® Trial version from the [CardExchangeSolutions.com](http://CardExchangeSolutions.com) website you have a **CardExchange9.exe** file available. This **CardExchange9.exe** file is a Self-Extracting file and contains everything needed for the installation of CardExchange® except the .NET Framework 3.5. This is available on CD or will be downloaded from the internet during the installation if not available on your system.

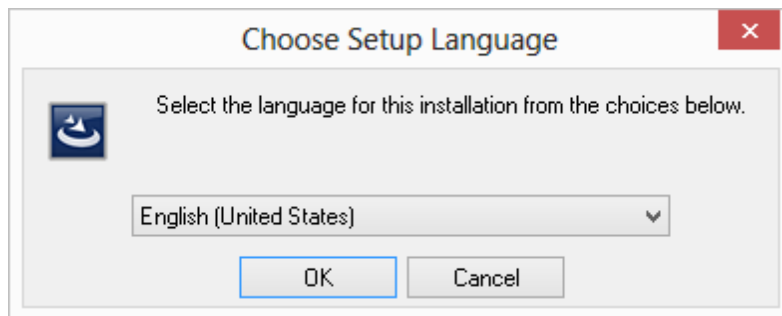
To start installing the downloaded version of CardExchange® just simply execute the **CardExchange9.exe** and follow the instructions. The Self-Extractor will copy the files to your computer and will start the installation of CardExchange® automatically. Now follow the process explained in the [Installing CardExchange®](#) section of this manual.

Before you start installing CardExchange® on your system, please make sure to take notice of the requirements as mentioned below to ensure a successful installation, activation, and registration of CardExchange® on your system:

- You can install CardExchange® on Windows XP, Windows Vista, Windows 7, and Windows 8,
- If you are installing CardExchange® Small Business Server Client, you can also install on Windows 2003, 2005, 2008 R2, and 2012 Servers,
- We support 32 and 64 bits operating systems,
- Internet Explorer 6 or higher needs to be installed,
- We advice to use Intel i3 or higher processors,
- When using 32 bits OS we advice a minimum of 1024 MB internal memory but we advice 2048 MB, especially when using 64 bit OS,
- We need 200 MB of Hard disk space,
- and an internet connection to activate and register your license (not applicable for SBS versions of CardExchange®),
- If you are using the provided CD, a CD or DVD player would be handy,
- and if you are using a hardware license dongle, one free USB port.
- For our Small Business Server installers, make sure you have a location available for the Shared Data folder that is going to be accessible for all your users!
- Last but not least, a nice cup of coffee or thee...

## 1.1 Installing CardExchange®

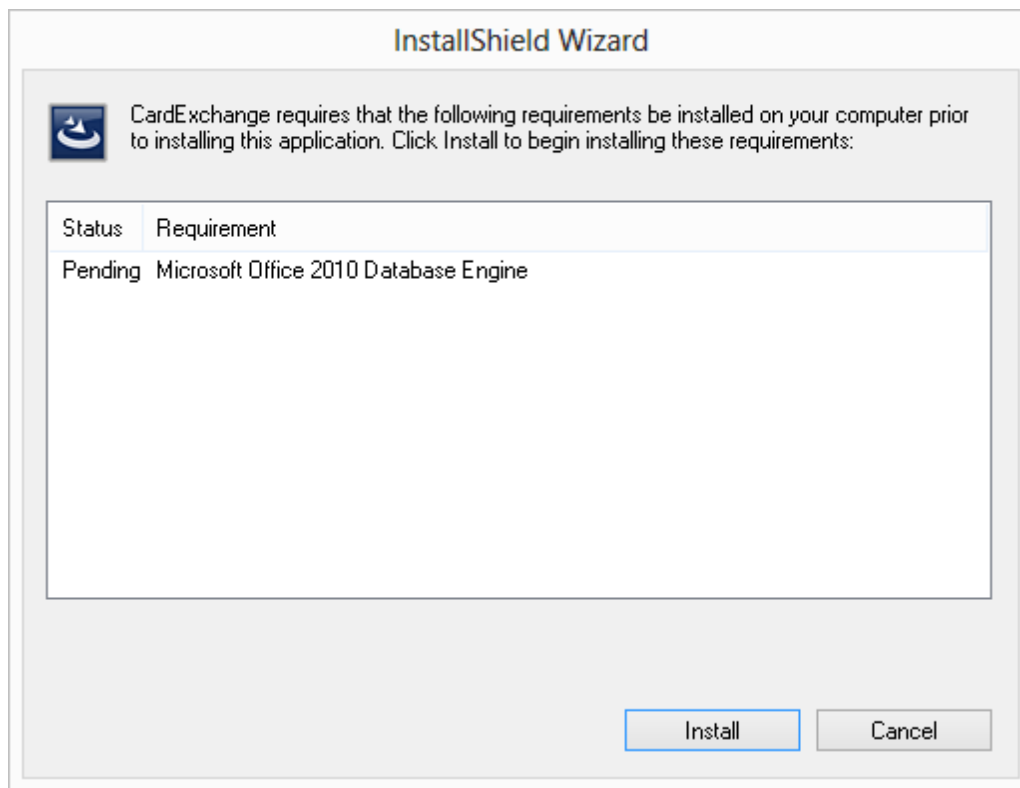
CardExchange® is offered English, Spanish, Portuguese, France, German, and Dutch. When the installer starts, you can also select the preferred language for the installer.



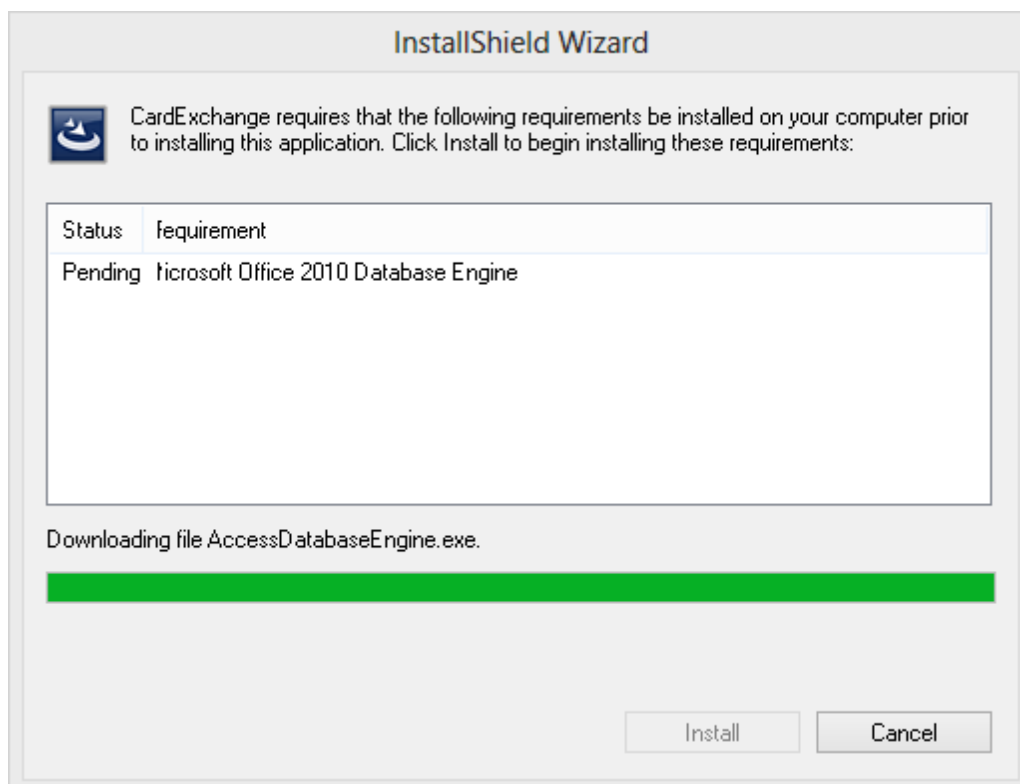
Note: The language that you choose for the installation will also be the default language that CardExchange® start up with. Click on OK to confirm your selection.

When you click on OK, the installer will start checking some of the system requirements. Two major important things will be checked by the installer; it will check if the .NET Framework is installed and it will check if the Database Engine is installed. When not available, the installer will automatically start downloading these applications. If there is no internet connection available, it will automatically installs it from CD. 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 applications manual.

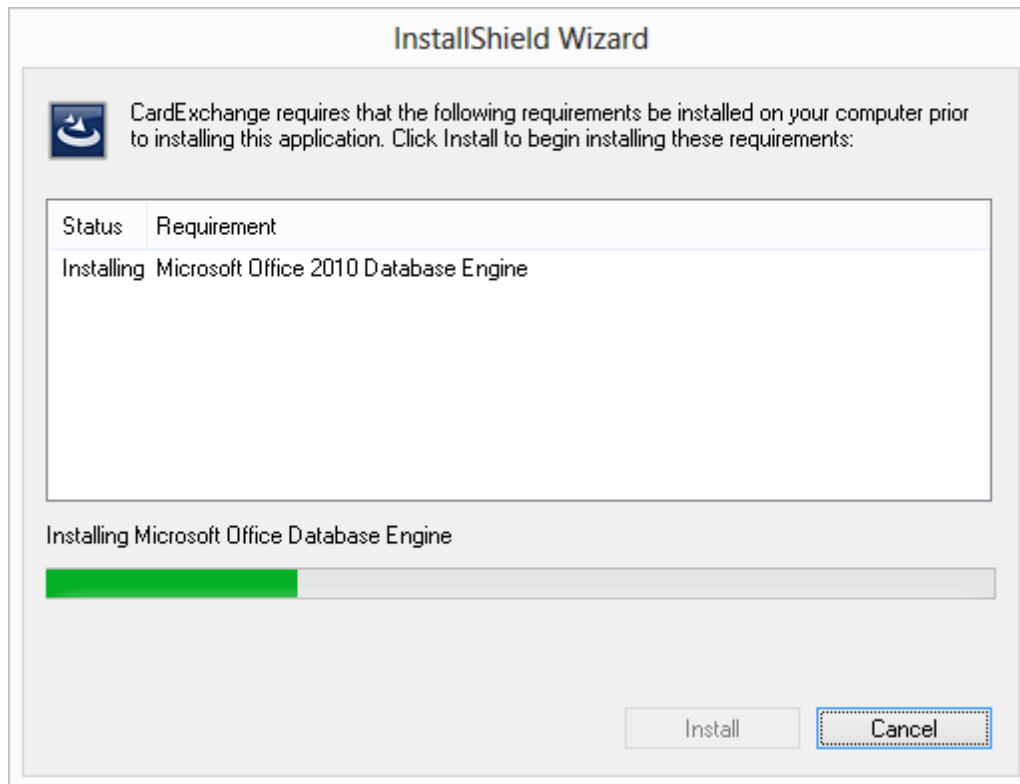
The .NET Framework is normally available on the computer systems so we will not go deeper into this. What is important is that the Database Engine is available. CardExchange® now uses the Database Access engine for storing database information for the Go edition. If you have Microsoft® Office 2010 installed on your system, this engine is already available, if you are running Office 2003, 2007, or you are not using any office products on your system, this Engine will be installed by the installer:



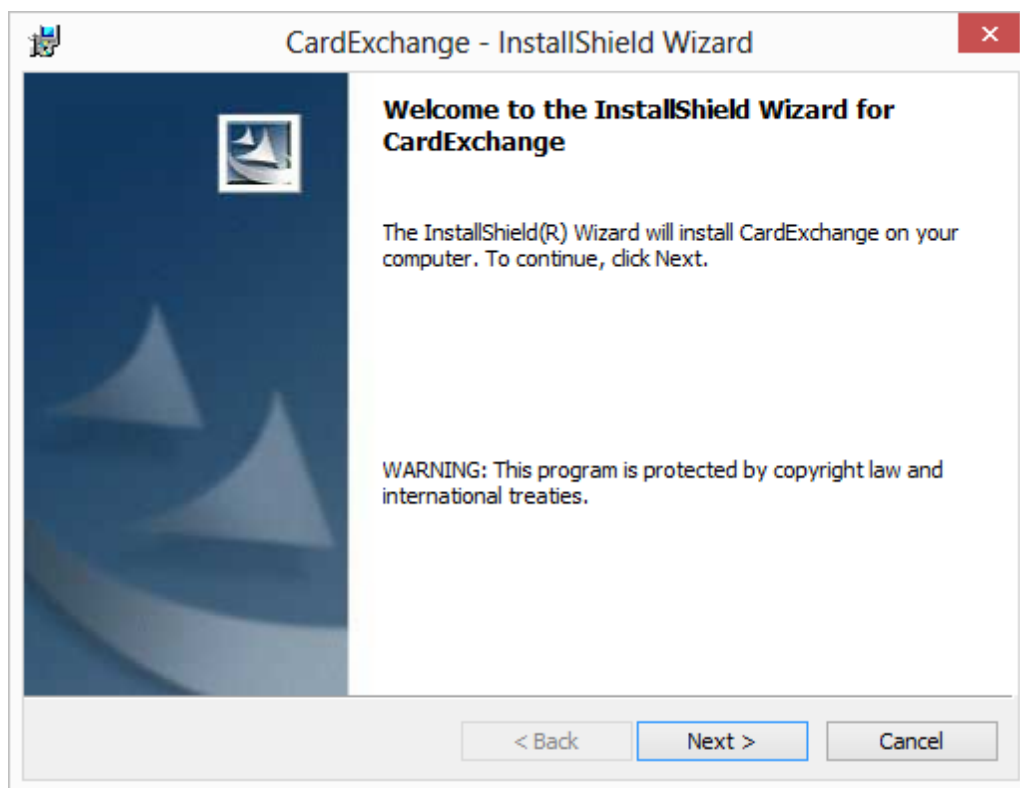
When the Database Engine is not available, the installer as shown will start. Please make sure that you install the Database Engine as it is required and not installing it will result in errors.



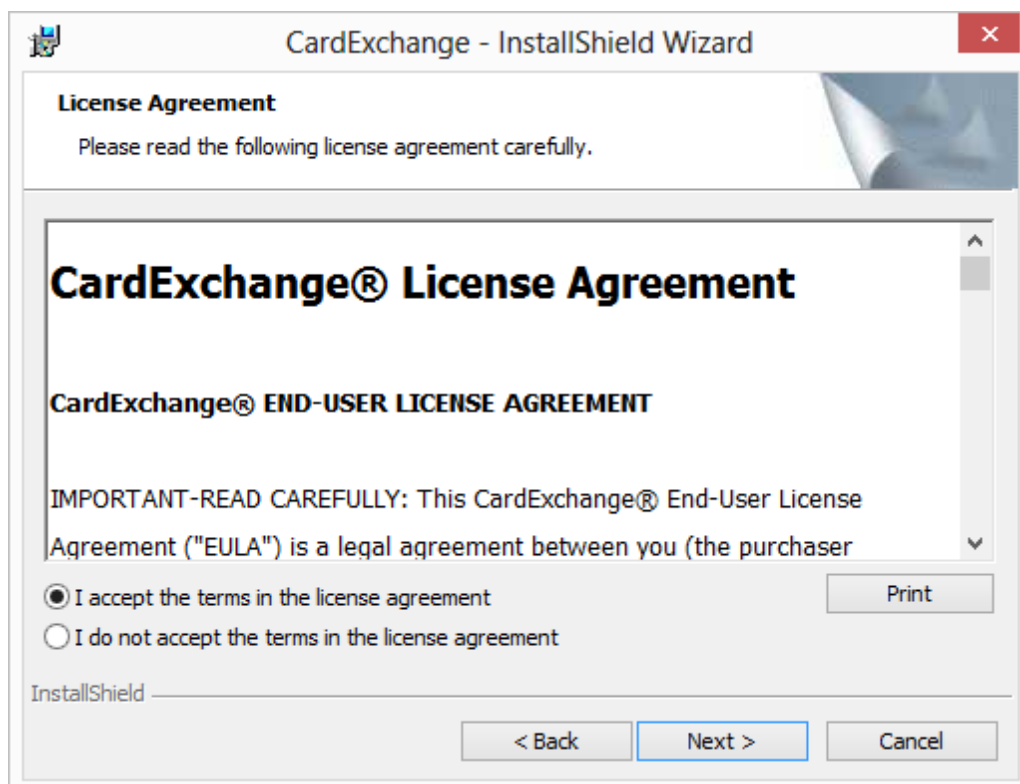
If you are installing the downloaded trial version of CardExchange®, the installer will try to download the Database Engine from the website. If no internet connection is available, this process will stop and the installation will be canceled.



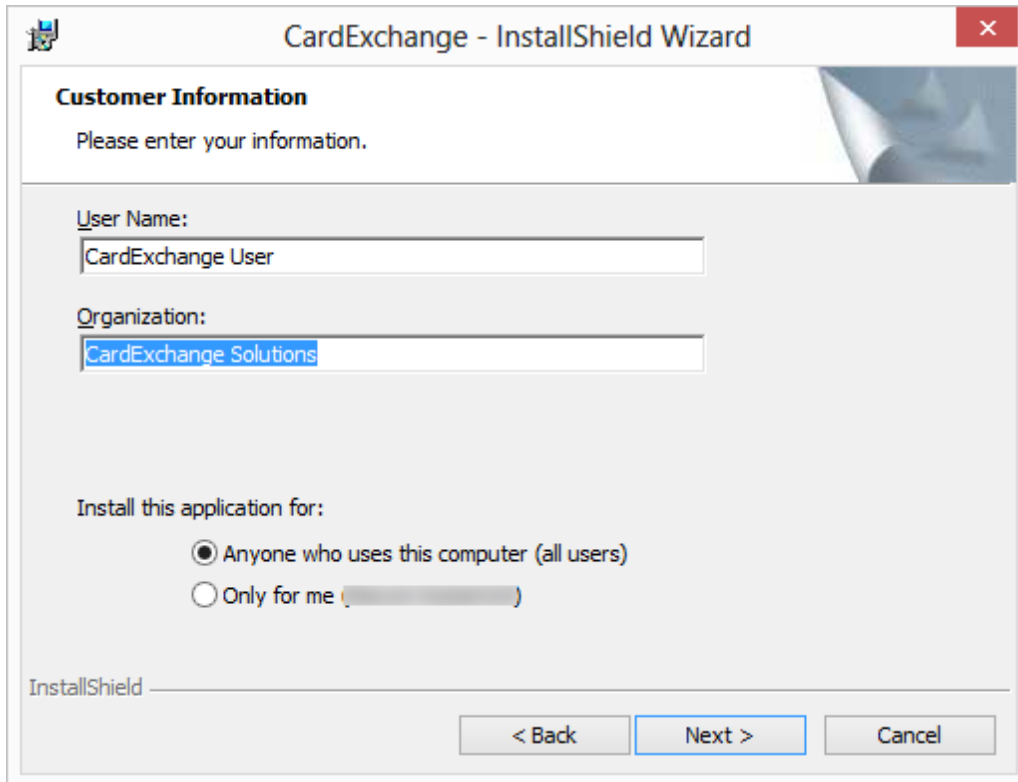
After downloading the Database Engine, or when it is available via the CD, the installer will start installing the Database Engine.



When the installation of the Database Engine is succeeded or the Database Engine was already available on your system, the CardExchange® installation wizard starts with the welcome page, now click Next to proceed:

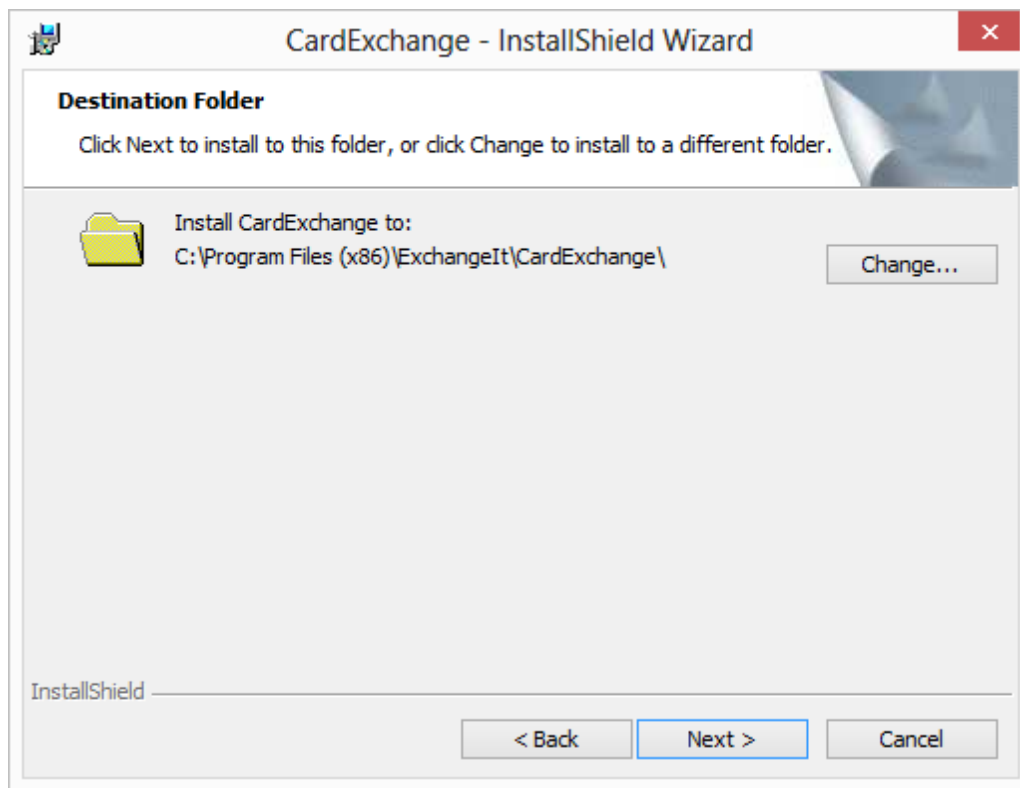


In this wizard page, the License Agreement is presented. You can click on the Print button to print out the complete text of the agreement. If you agree to the terms, please select the "I accept the terms in the license agreement" option and proceed with Next. If you do not agree, please select the "I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

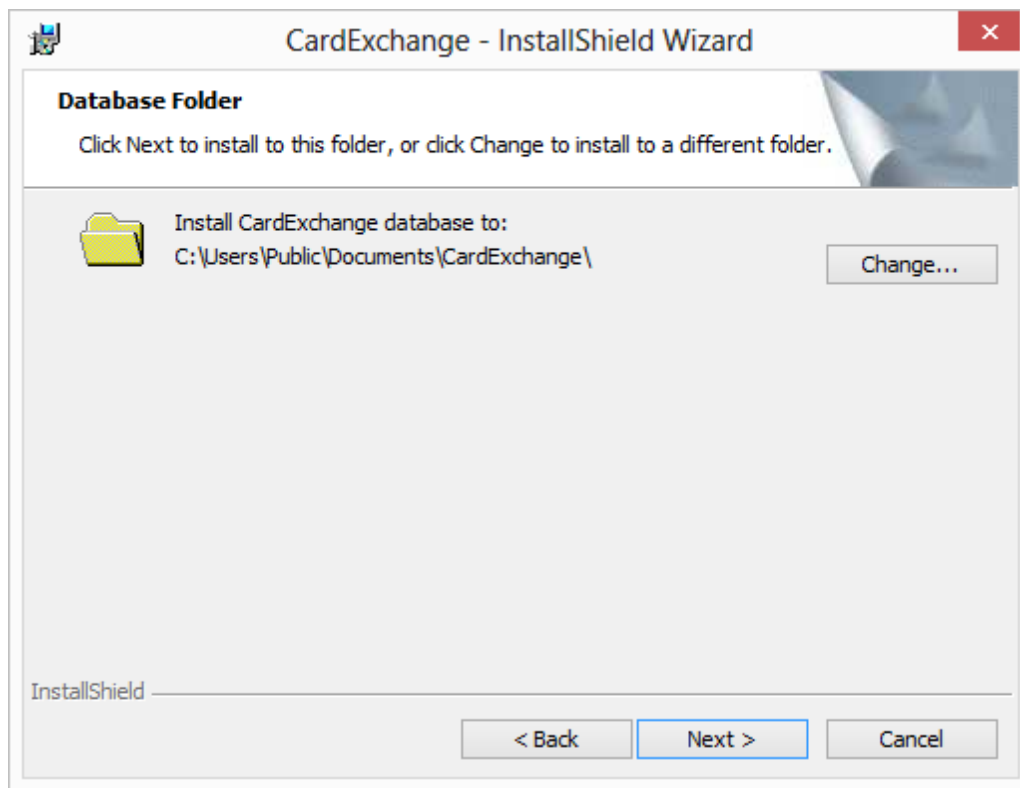
The screenshot shows a Windows-style wizard window titled "CardExchange - InstallShield Wizard". The window has a standard title bar with a close button (X) in the top right corner. The main content area is titled "Customer Information" and includes the instruction "Please enter your information." Below this, there are two text input fields: "User Name:" with the text "CardExchange User" and "Organization:" with the text "CardExchange Solutions". Underneath these fields, there is a section titled "Install this application for:" with two radio button options: "Anyone who uses this computer (all users)" which is selected, and "Only for me (user name: )" which is unselected. At the bottom of the window, there is a progress bar labeled "InstallShield" and three buttons: "< Back", "Next >" (which is highlighted with a blue border), and "Cancel".

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:





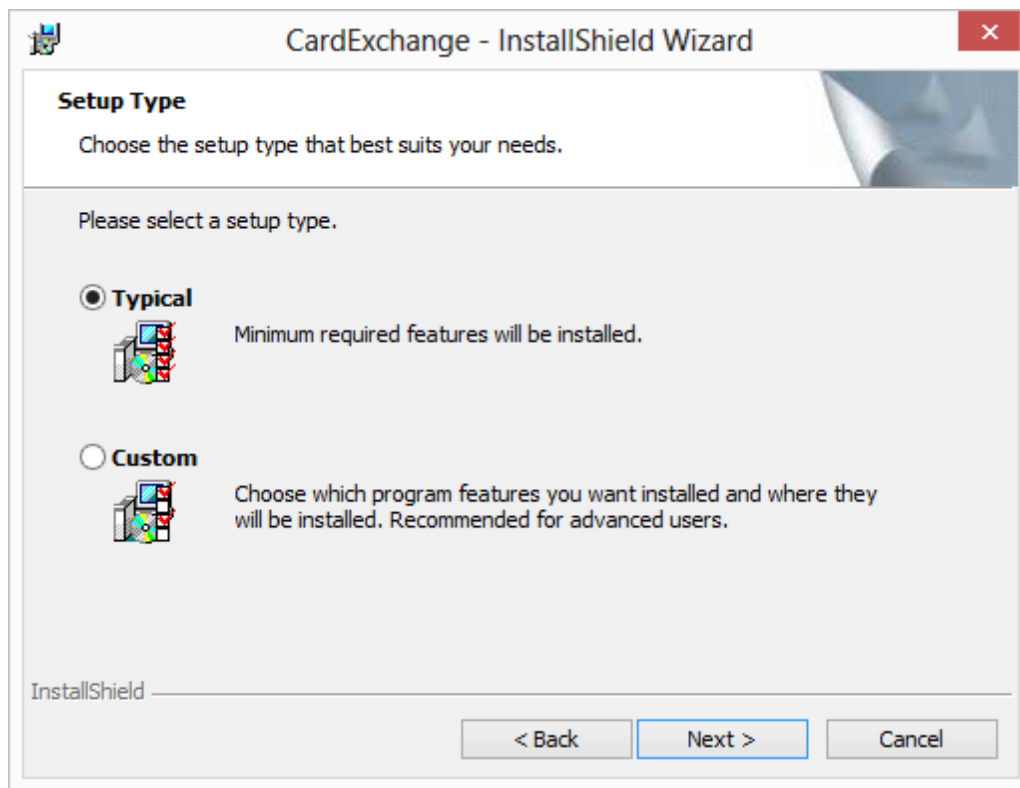
CardExchange® installations are compliant with Windows standards which means that by default the application is installed in the Program Files (x86) folder as shown in the screen shot above. The folder will be automatically created during the installation. Click on the Change button if you want to install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



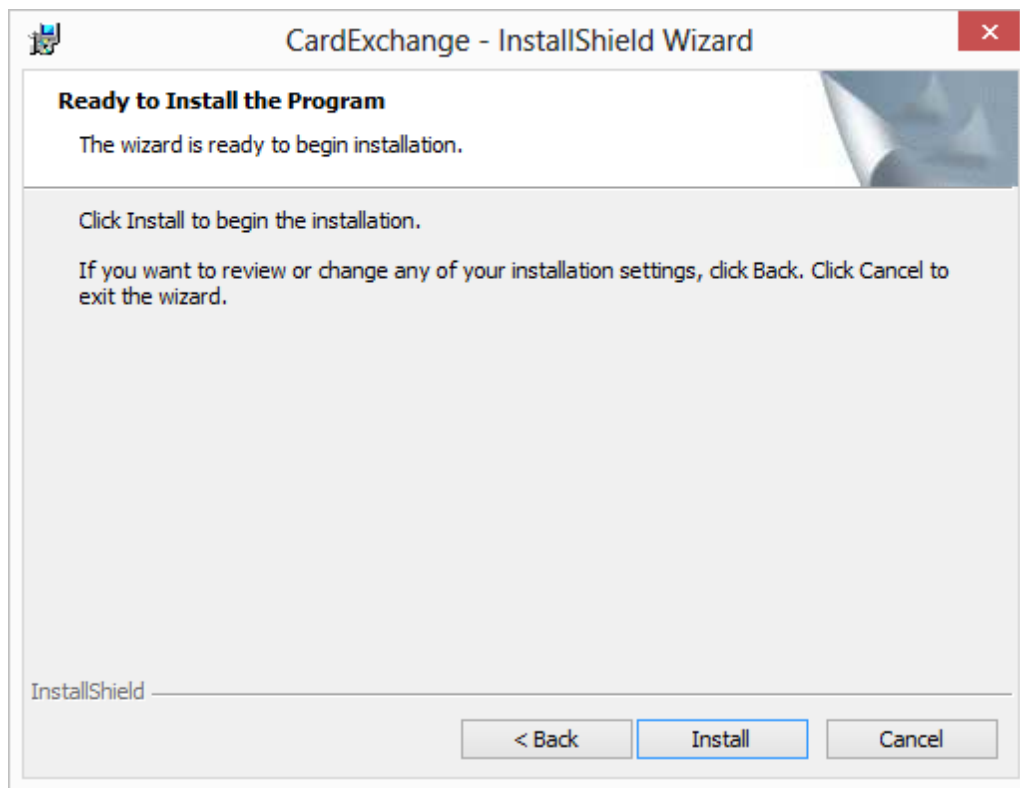
The Database folder of CardExchange® is one of the most powerful and flexible feature of the CardExchange® application. It contains all your card templates, database configuration files, contactless encoding files, etc. It is very important to install this database folder on a location that can be accessed by the user or by more users of the computer. The CardExchange® application reads and writes information from and to this folder and therefore the user needs to have read and write rights to this location. By default it will be installed on Public section of your system, like as shown in the screenshot above. 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!

Note for Small Business Server users: Install this Data folder on a location on your network accessible for all users and part of your backup policies!

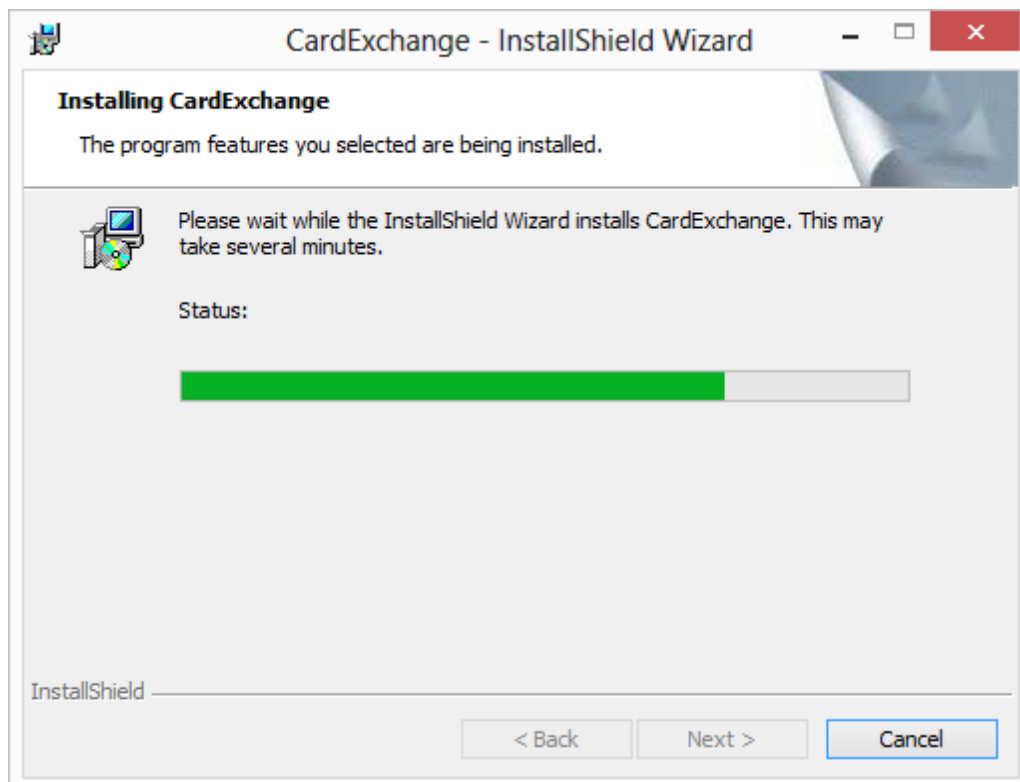
Make sure that you make regular backups of this Data folder. In case of a computer crash, this backup will save you a lot of work. You only have to install CardExchange® as normal and after the installation you replace the new Data folder by the backup and your system is up and running again! We advice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

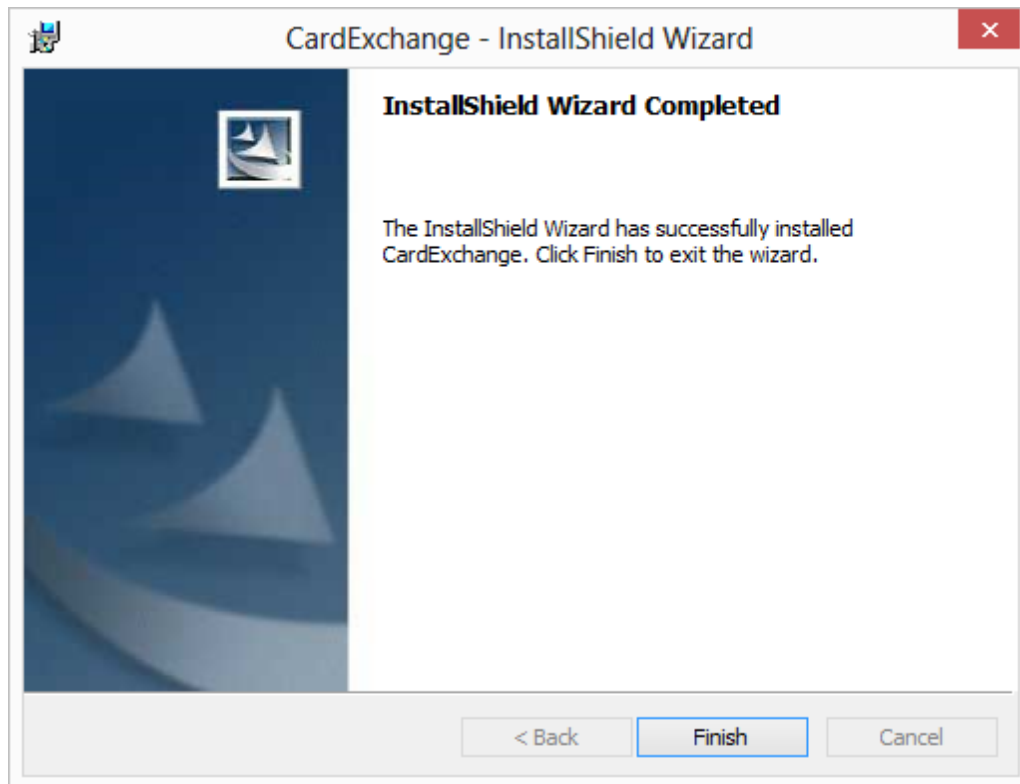


In the Setup type page you are asked to select the type of installation you want to proceed with. For standard installations, please select the Typical option. The Custom installation only applies to Small Business Server installations as there additional Print Server, Dispatchers, and Clients can be needed. For more information about this, please see the Small Business Server Installation Manual.



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



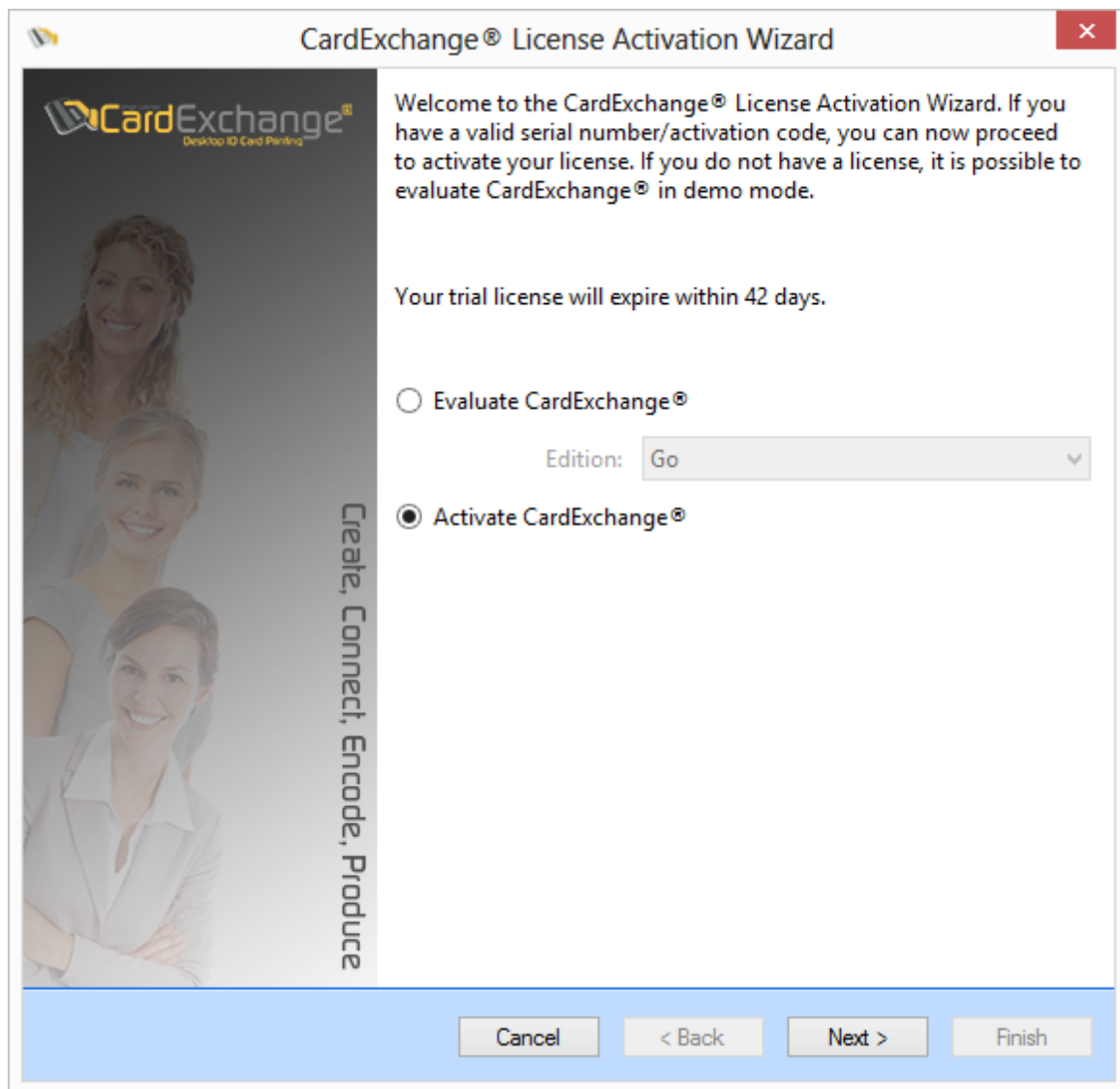


When the installation has succeeded, you can click on Finish to close the installer. Any temporary files will be removed from your system. You can run CardExchange® by double clicking on the Desktop icon or select the application from the Windows Start menu.

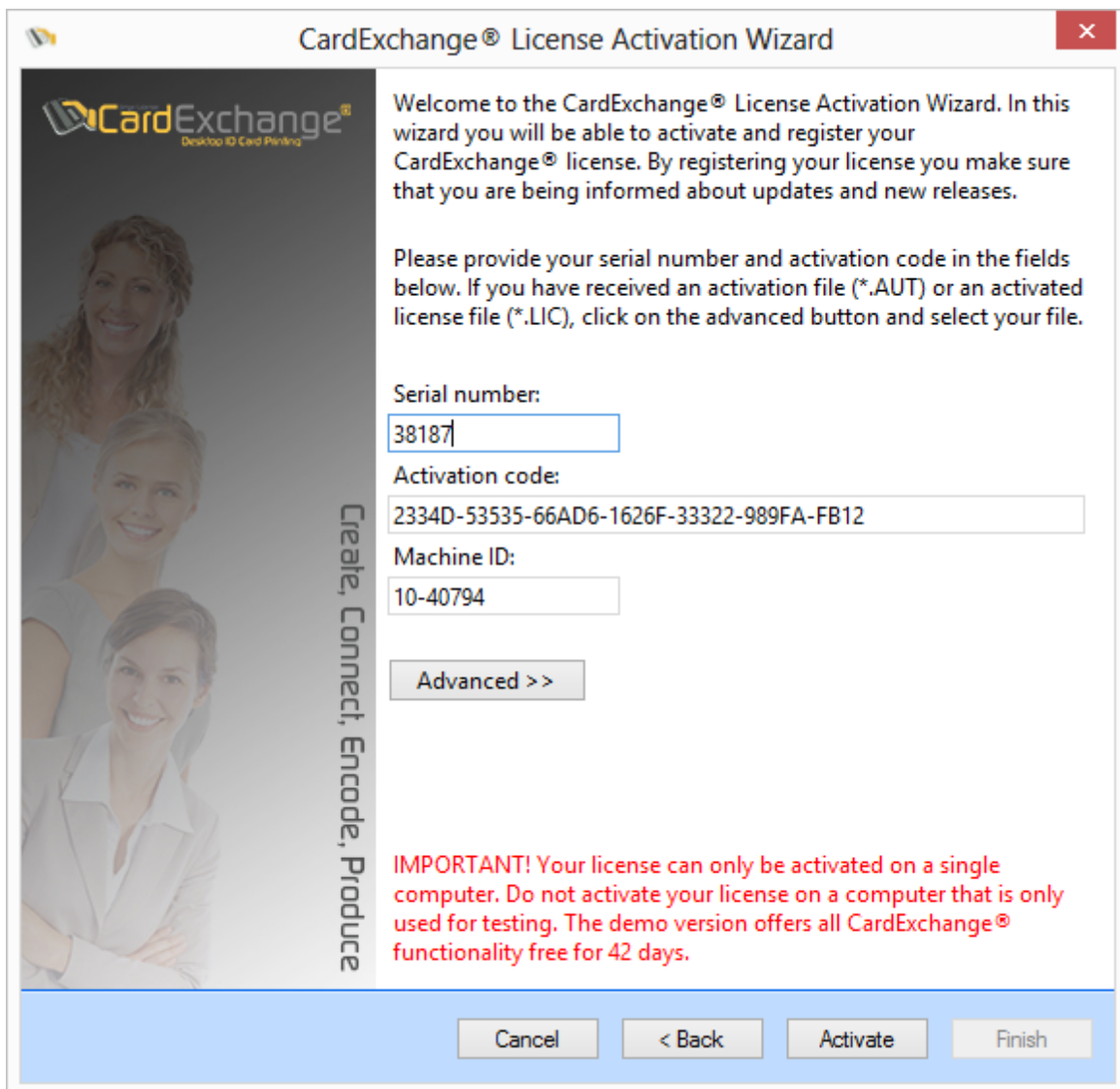
## 1.2 Activating CardExchange®

Activating CardExchange® is very simple to do and only requires an internet connection. Please take note that Small Server Business editions of CardExchange® cannot be activated via this procedure. Please see the Small Server Business Installation Manual for this process!

When CardExchange® is installed on your system and you are running CardExchange® for the first time, CardExchange® will start with the Activation Wizard:



Even if you are using a trial version, you can directly activate it without any loss of data or configurations. This wizard is also used when you upgrading from a edition to a higher edition. You can always open the activation wizard by selecting CardExchange® Activation from the Windows Start Menu or via the Self Service tab in the main window and click on Activation window. Click Next to proceed:



The image shows a screenshot of the 'CardExchange® License Activation Wizard' window. The window has a title bar with the CardExchange logo and a close button. On the left side, there is a vertical banner with the CardExchange logo and the text 'Desktop ID Card Printing' and 'Create, Connect, Encode, Produce' next to a photo of three smiling women. The main area contains a welcome message, instructions, and input fields for 'Serial number', 'Activation code', and 'Machine ID'. There is an 'Advanced >>' button and a red warning message at the bottom. At the very bottom, there are four buttons: 'Cancel', '< Back', 'Activate', and 'Finish'.

**CardExchange® License Activation Wizard**

Welcome to the CardExchange® License Activation Wizard. In this wizard you will be able to activate and register your CardExchange® license. By registering your license you make sure that you are being informed about updates and new releases.

Please provide your serial number and activation code in the fields below. If you have received an activation file (\*.AUT) or an activated license file (\*.LIC), click on the advanced button and select your file.

Serial number:  
38187

Activation code:  
2334D-53535-66AD6-1626F-33322-989FA-FB12

Machine ID:  
10-40794

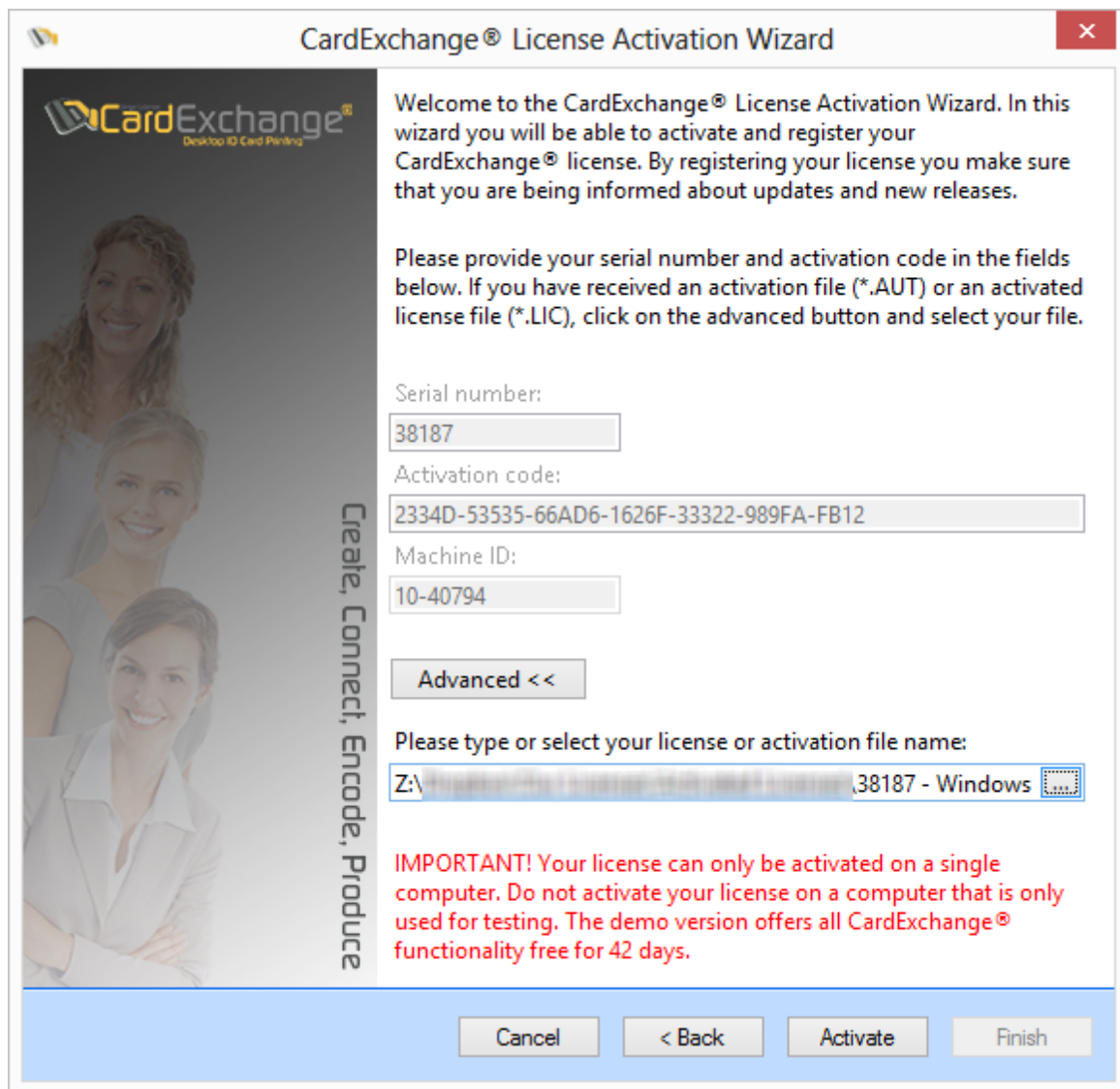
Advanced >>

**IMPORTANT!** Your license can only be activated on a single computer. Do not activate your license on a computer that is only used for testing. The demo version offers all CardExchange® functionality free for 42 days.

Cancel < Back Activate Finish

When you purchased your copy of CardExchange®, you received a serial number and activation code from your reseller via email or printed on a label on the back of a DVD box or CD wallet. In this page of the wizard you need to enter this information. You can also find the Machine ID of your computer. The Machine ID is the digital fingerprint of your computer and is used to activate the license. You do not need to do anything with this Machine ID except if you are activating CardExchange® on a system without internet access. Your reseller or CardExchange® Solutions can activate your license for you. You can also activate the license via our website using a computer that has internet access. [Click HERE](#) to visit the activation page of CardExchange® Solutions. To do so, you will have to send your license information and the Machine ID.

When the license is activated, you will receive a so called LIC file. You need to copy this LIC file to a location on the target system:



The image shows a screenshot of the 'CardExchange® License Activation Wizard' window. The window has a title bar with the CardExchange logo and a close button. On the left side, there is a vertical banner with the CardExchange logo and the text 'Desktop ID Card Printing' and 'Create, Connect, Encode, Produce' next to a photo of three smiling women. The main area contains the following text: 'Welcome to the CardExchange® License Activation Wizard. In this wizard you will be able to activate and register your CardExchange® license. By registering your license you make sure that you are being informed about updates and new releases.' Below this, it says: 'Please provide your serial number and activation code in the fields below. If you have received an activation file (\*.AUT) or an activated license file (\*.LIC), click on the advanced button and select your file.' There are three input fields: 'Serial number:' with the value '38187', 'Activation code:' with the value '2334D-53535-66AD6-1626F-33322-989FA-FB12', and 'Machine ID:' with the value '10-40794'. Below these fields is an 'Advanced <<' button. Then, it says 'Please type or select your license or activation file name:' followed by a text box containing 'Z:\...38187 - Windows' and a browse button (three dots). Below this is a red warning message: 'IMPORTANT! Your license can only be activated on a single computer. Do not activate your license on a computer that is only used for testing. The demo version offers all CardExchange® functionality free for 42 days.' At the bottom, there are four buttons: 'Cancel', '< Back', 'Activate', and 'Finish'.

CardExchange® License Activation Wizard

Welcome to the CardExchange® License Activation Wizard. In this wizard you will be able to activate and register your CardExchange® license. By registering your license you make sure that you are being informed about updates and new releases.

Please provide your serial number and activation code in the fields below. If you have received an activation file (\*.AUT) or an activated license file (\*.LIC), click on the advanced button and select your file.

Serial number:  
38187

Activation code:  
2334D-53535-66AD6-1626F-33322-989FA-FB12

Machine ID:  
10-40794

Advanced <<

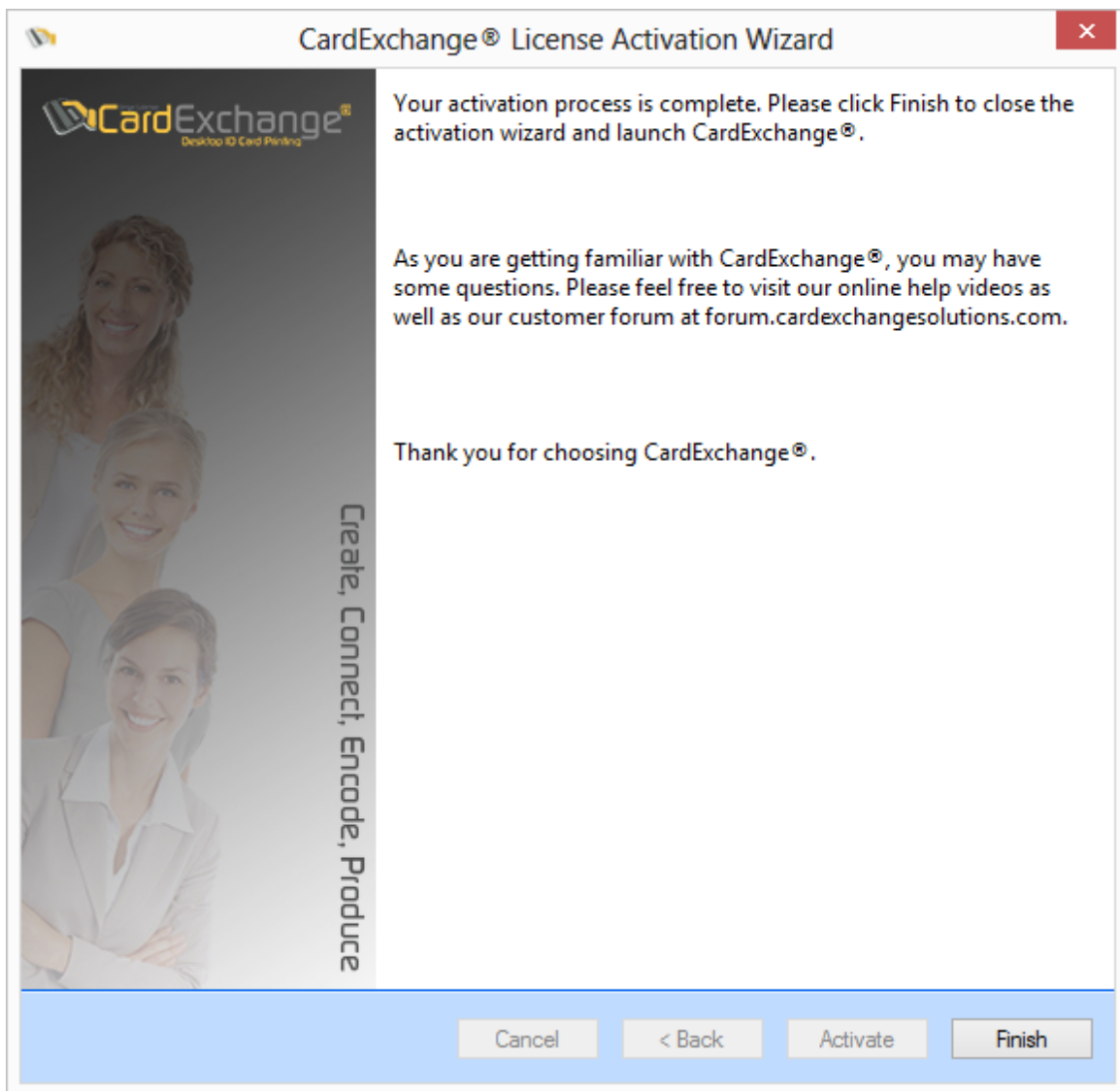
Please type or select your license or activation file name:  
Z:\...38187 - Windows

**IMPORTANT! Your license can only be activated on a single computer. Do not activate your license on a computer that is only used for testing. The demo version offers all CardExchange® functionality free for 42 days.**

Cancel < Back Activate Finish

Click on the Advanced button and select the three dots button on the right to browse to the LIC file location. When you click on Activate the license will be installed on your computer. The only difference is that in situations where internet connection is available, CardExchange® contact the license server and verify the license information and activate the license based on the same Machine ID.





The activation can take up to 60 seconds, depending on the edition you are activating. LIC file activations are done in a second as no connection is needed. During the activation, a progress bar will indicate the time left before activated. When the activation is successful, you can click on Finish to close the activation process. When you activate CardExchange® for the first time, it will directly start after you click on Finish. If you are activating an upgrade, after clicking on Finish you will have to restart CardExchange® to make the license change effective.

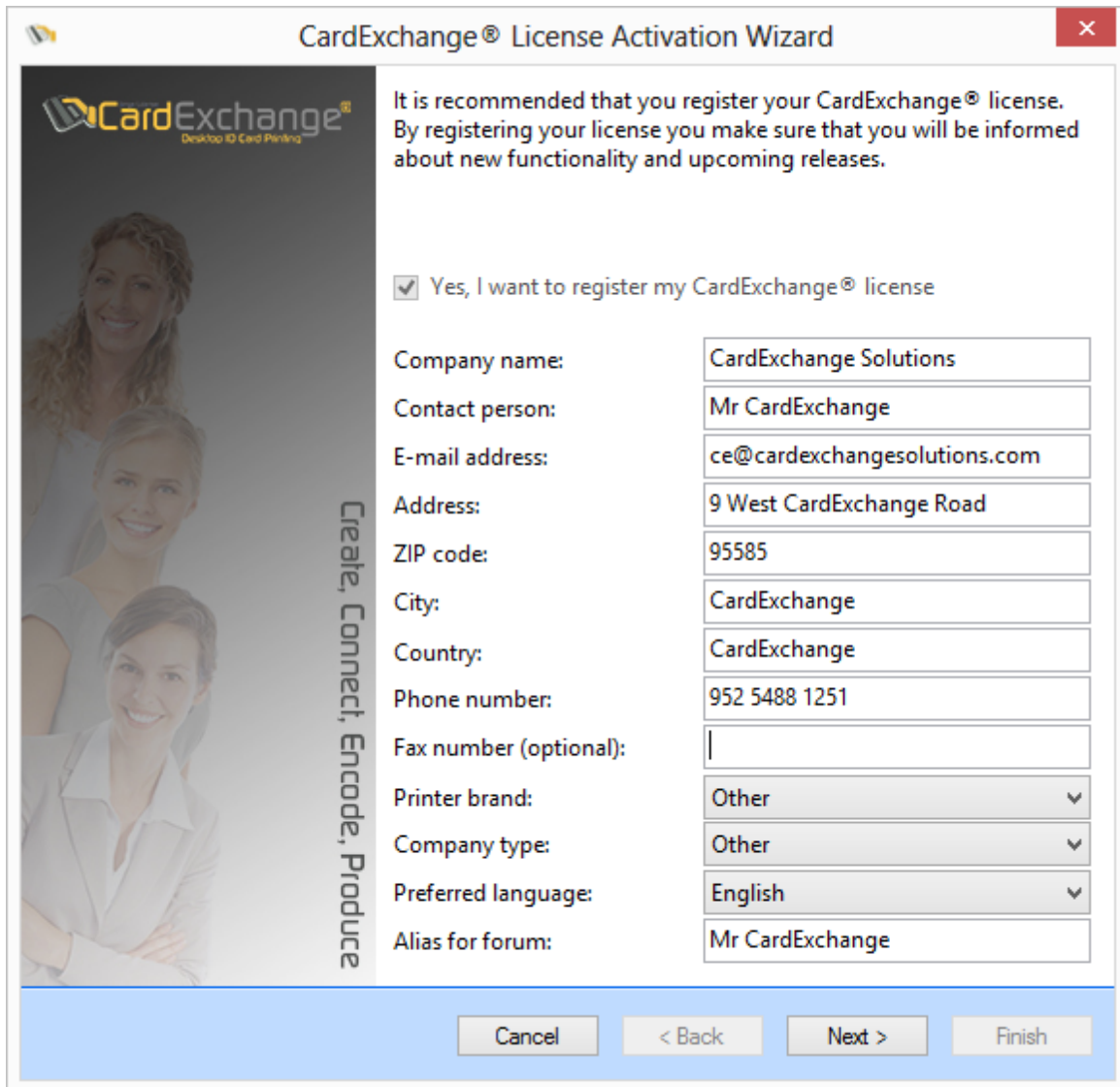
## 1.3 Registration CardExchange®

When you have purchased CardExchange®, you are eligible for free life-time version upgrades if you register your copy of CardExchange®. Please note, this only applies for standard CardExchange® licenses and free upgrades do not apply for Small Business Server Editions.

Registering your CardExchange® is very easy and straightforward. Besides the fact that it gives you life-time free upgrades, it also keeps you up to date about new releases and any other important information of CardExchange® Solutions or your reseller.

You can start the registration process by clicking on the Register license button in the Service center tab in the

main window:



The image shows a screenshot of the 'CardExchange® License Activation Wizard' window. The window has a title bar with the CardExchange logo and a close button. On the left side, there is a vertical banner with the CardExchange logo and the text 'Desktop ID Card Printing' and 'Create, Connect, Encode, Produce'. The main area contains a message: 'It is recommended that you register your CardExchange® license. By registering your license you make sure that you will be informed about new functionality and upcoming releases.' Below this message is a checkbox labeled 'Yes, I want to register my CardExchange® license' which is checked. To the right of the checkbox is a list of input fields for registration information: Company name, Contact person, E-mail address, Address, ZIP code, City, Country, Phone number, Fax number (optional), Printer brand, Company type, Preferred language, and Alias for forum. Each field has a corresponding text box or dropdown menu. At the bottom of the window, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

CardExchange® License Activation Wizard

It is recommended that you register your CardExchange® license. By registering your license you make sure that you will be informed about new functionality and upcoming releases.

☒ Yes, I want to register my CardExchange® license

Company name: CardExchange Solutions

Contact person: Mr CardExchange

E-mail address: ce@cardexchangesolutions.com

Address: 9 West CardExchange Road

ZIP code: 95585

City: CardExchange

Country: CardExchange

Phone number: 952 5488 1251

Fax number (optional):

Printer brand: Other

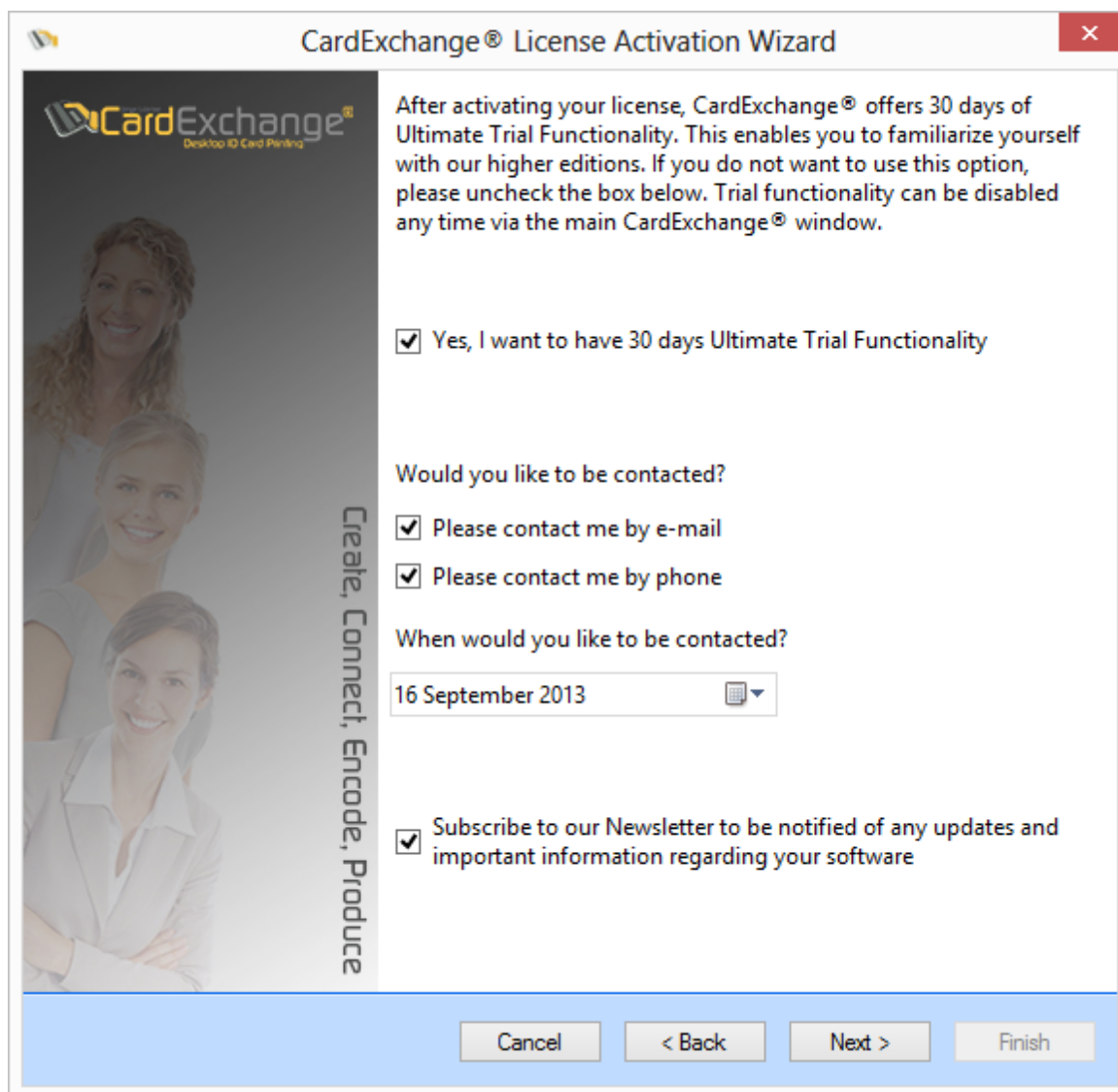
Company type: Other

Preferred language: English

Alias for forum: Mr CardExchange

Cancel < Back Next > Finish

The registration is a part of the Activation Wizard. In this section you simply provide all the requested information. The fax number is optional. The forum automation is a feature that we currently developing and will log you directly into the end-user forum of CardExchange® to get instant support via the CardExchange® community. When all is entered, proceed to the next page:



The image shows a software window titled "CardExchange® License Activation Wizard". On the left is a vertical banner with the CardExchange logo and the text "Desktop ID Card Printing" and "Create, Connect, Encode, Produce" next to a photo of three smiling women. The main area contains the following text: "After activating your license, CardExchange® offers 30 days of Ultimate Trial Functionality. This enables you to familiarize yourself with our higher editions. If you do not want to use this option, please uncheck the box below. Trial functionality can be disabled any time via the main CardExchange® window." Below this is a checked checkbox: "Yes, I want to have 30 days Ultimate Trial Functionality". Then, the question "Would you like to be contacted?" is followed by two checked checkboxes: "Please contact me by e-mail" and "Please contact me by phone". Below that is the question "When would you like to be contacted?" with a date picker set to "16 September 2013". At the bottom is a checked checkbox: "Subscribe to our Newsletter to be notified of any updates and important information regarding your software". The bottom of the window has a blue bar with four buttons: "Cancel", "< Back", "Next >", and "Finish".

CardExchange® License Activation Wizard

After activating your license, CardExchange® offers 30 days of Ultimate Trial Functionality. This enables you to familiarize yourself with our higher editions. If you do not want to use this option, please uncheck the box below. Trial functionality can be disabled any time via the main CardExchange® window.

☒ Yes, I want to have 30 days Ultimate Trial Functionality

Would you like to be contacted?

☒ Please contact me by e-mail

☒ Please contact me by phone

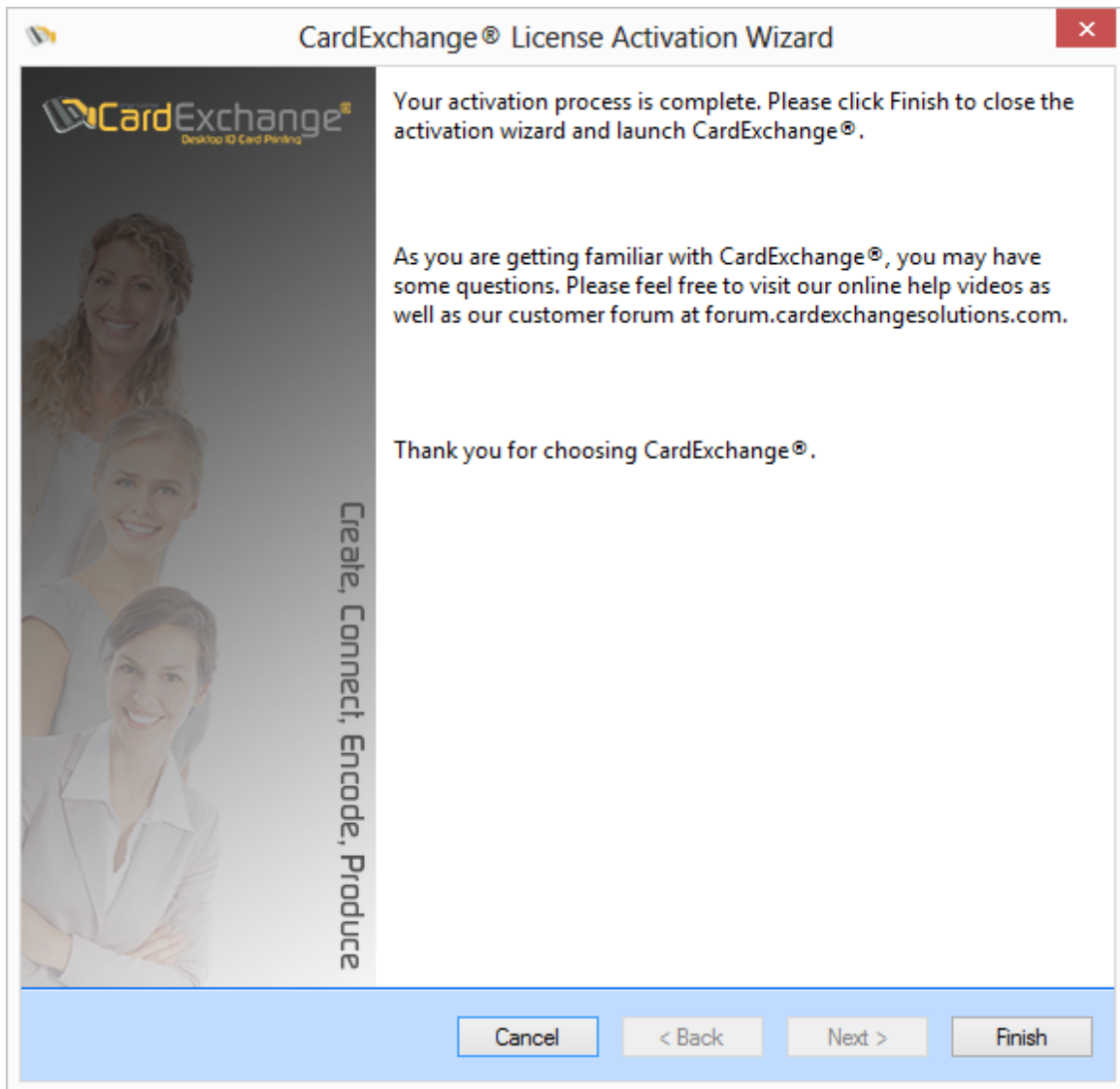
When would you like to be contacted?

16 September 2013

☒ Subscribe to our Newsletter to be notified of any updates and important information regarding your software

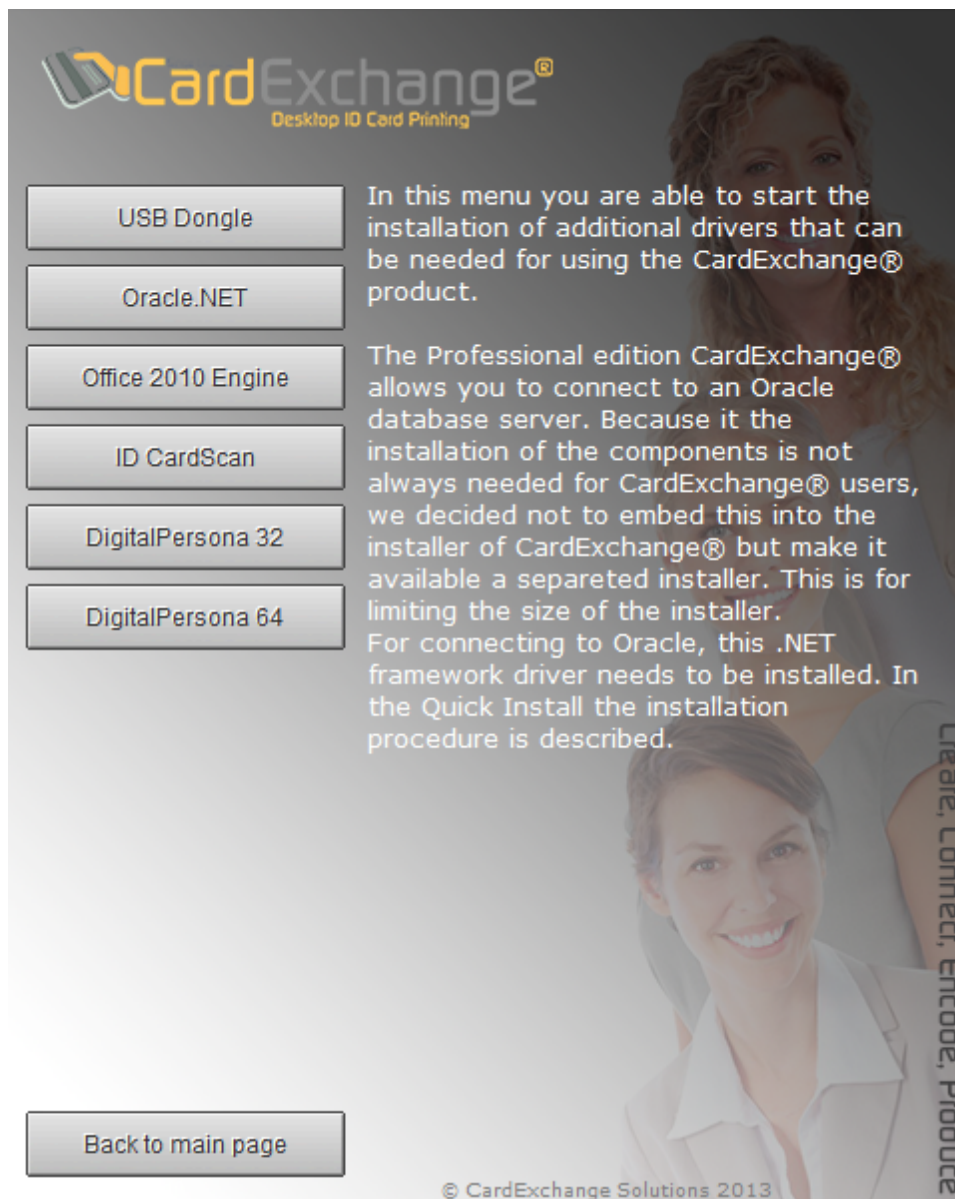
Cancel < Back Next > Finish

CardExchange® offers you the possibility to try out the functionality of higher editions so you can see if there is functionality that you can use and test before purchasing the edition. You can get max 30 days of Ultimate functionality without limitations. If you want to check out other functionality, check this check box. You can also request to be contacted, by email or phone, with a preferred date. Don't forget to subscribe to our newsletter and keep up to date with the latest CardExchange® news. Click next to proceed to the final page:



When you click on Finish, all the information will be stored. All your information will be used to make our products better and to be able to inform you. Your information will not be sold to any commercial marketing company.

## 2 Drivers



CardExchange® 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 CD and you can download them via our website by [clicking HERE](#).

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.
- **Oracle.NET** - When you want to make a native connection to an Oracle database server you need to install this .NET Framework Oracle connector first.

- **Office 2010 Engine** - This is the Database Engine that is being used by CardExchange® for the internal database option. This is normally automatically installed during the CardExchange® installation is the only driver that is always available via the installer. If something goes wrong with the installation, you can always install it manual.
- **ID CardScan** - In the Ultimate edition we now support ID Card Scanners. One of the supported scanners is the CardScan. 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** - Also now supported in our Ultimate edition are biometric devices. 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.



[www.IDZone.com](http://www.IDZone.com)  
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