



Identify

Authorize

Manage

Track

CardExchange® Visitor Manual

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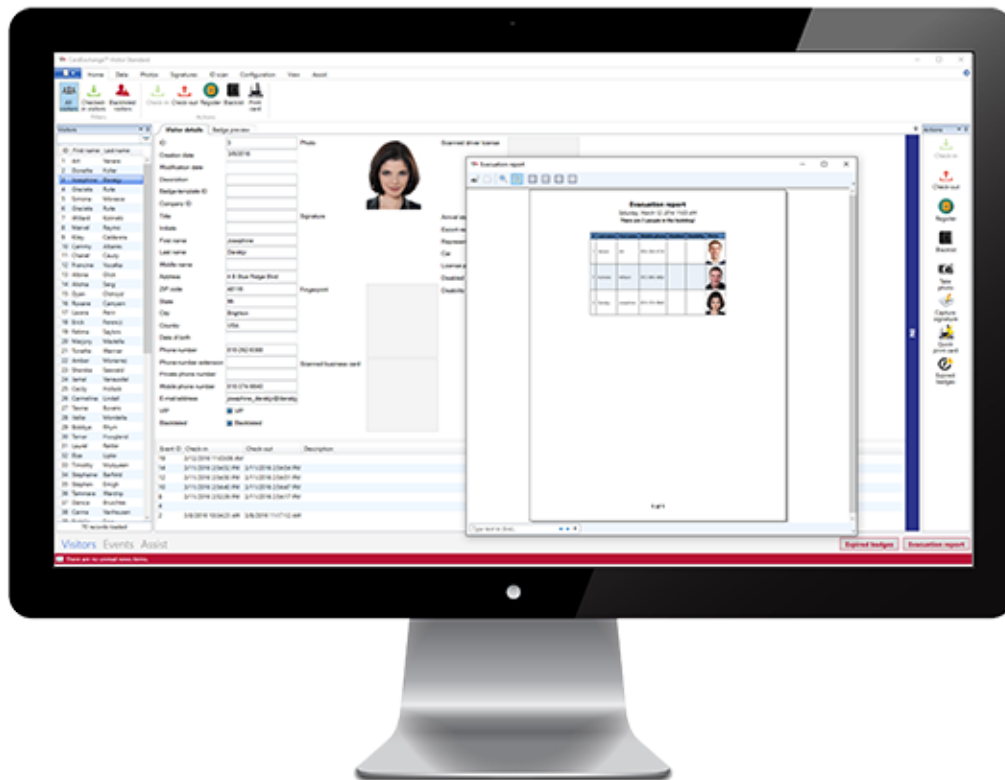
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1 Welcome



Welcome to the CardExchange® Visitor Management Help File

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
- Customize Record Field Labels
- User Login Profiles
- Import CSV files
- Import/Export Database Record Data/Images

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
- Define User and/or Group Permissions
- Track and Issue Parking Passes
- SMTP Integration
- Advanced Visitor Reports

1.2 System Requirements

Specifications

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 4.6
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?](#)  15
- [What should I do if activation fails?](#)
- [How do I create or edit my badge layout?](#)  100
- [How can I add a Photo to my badge layout?](#)  245
- [How can I capture an ID photo for a visitor?](#)  59
- [How can I capture a signature?](#)  76
- [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?](#)  247

- [How can I configure magnetic encoding?](#)  192
- [How can I protect CardExchange® Visitor with user names and passwords?](#)  104
- [How can I find answers to specific questions about CardExchange® Visitor \(forum\)?](#)
- [Using GDI+ printing technology when printing results are poor.](#)  182
- [How to use ID scanners with CardExchange® Visitor.](#)  35
- [What are the colored circles for next to the visitors name?](#)  32
- [How do I add a new visitor?](#)  34
- [How do I create a new event?](#)  122
- [How can I import or export data?](#)  56
- [How do I use filters to show me checked-in visitors?](#)  46
- [How do I manage expired badges?](#)  272
- [How do I generate an Evacuation report?](#)  274
- [How do I view and print visitor reports?](#)  151

2 Getting Started

To get started with CardExchange® Visitor, it is important to get familiarized with the interface.

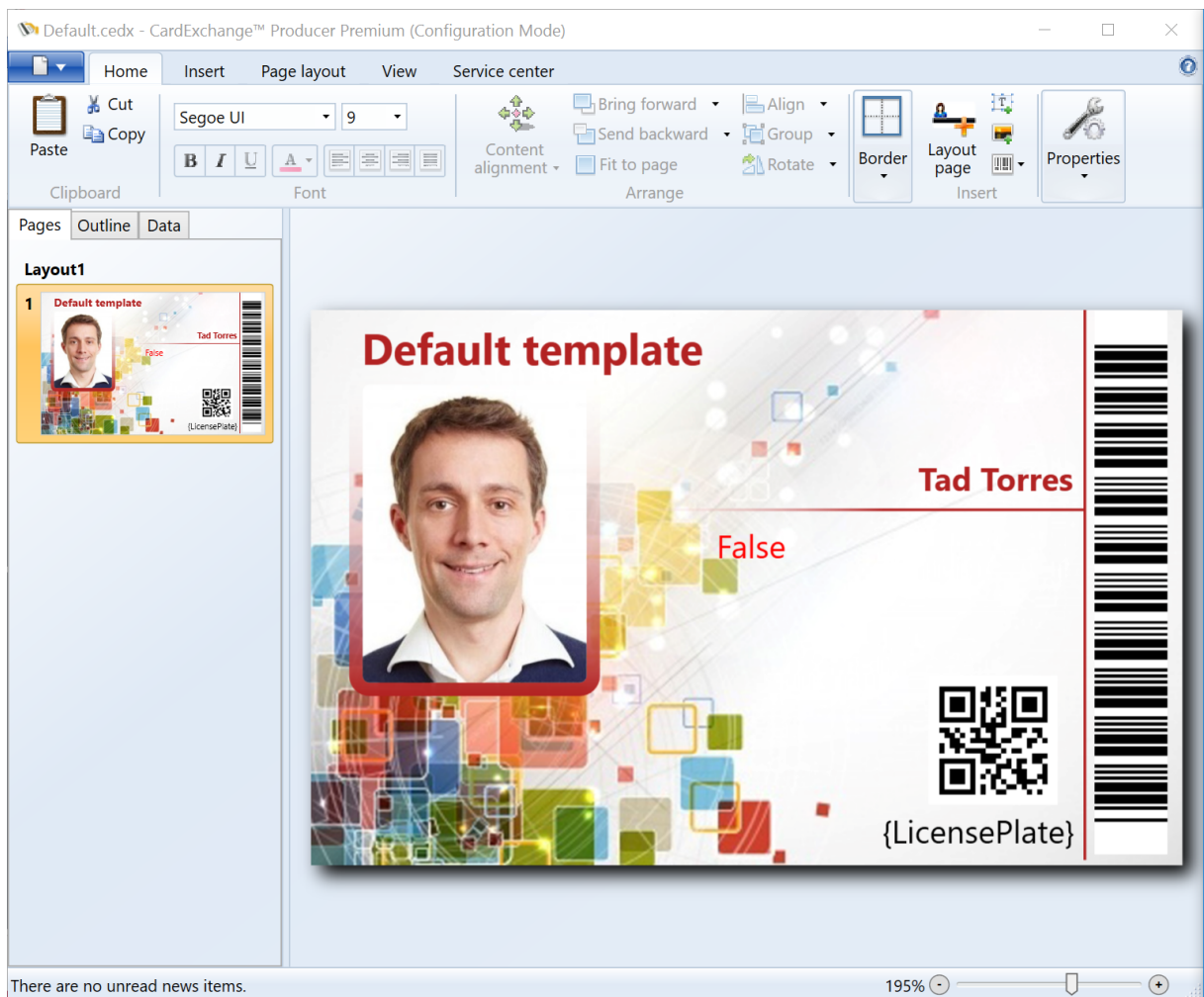
CardExchange® Visitor has two main interfaces:

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

The screenshot displays the CardExchange™ Visitor Standard application window. The interface is divided into several sections:

- Top Menu Bar:** Includes Home, Data, Photos, Signatures, Configuration, View, and Assist.
- Toolbar:** Contains icons for New visitor, New item, Edit visitor, Delete visitor, Visitor groups, All visitors, Checked-in visitors, Blacklisted visitors, Check-in, Check-out, Blacklist, and Print badge.
- Visitors List:** A table on the left showing a list of visitors with columns for Last name, First name, and Representing. The list includes Torres Tad (CardExchange), Keller Alissa (Security Cons), and Williams Nadine.
- Visitor details:** A central form for editing visitor information. It includes fields for ID, License plate, Date of birth, Address, City, State, ZIP code, Country, Title, First name, Last name, Representing, Phone number, Mobile phone number, E-mail address, Car, and various checkboxes for Disabled, VIP, Escort required, Blacklisted, and Arrival status.
- Badge preview:** A section on the bottom left showing a preview of the visitor's badge with a photo and name.
- Actions Panel:** A vertical panel on the right with buttons for New visitor, Check-in, Check-out, Blacklist, Take photo, Capture signature, and Print badge.
- Footer:** Includes tabs for Visitors, Events, Reports, and Assist, along with status indicators for Expired badges (1) and Evacuation report.

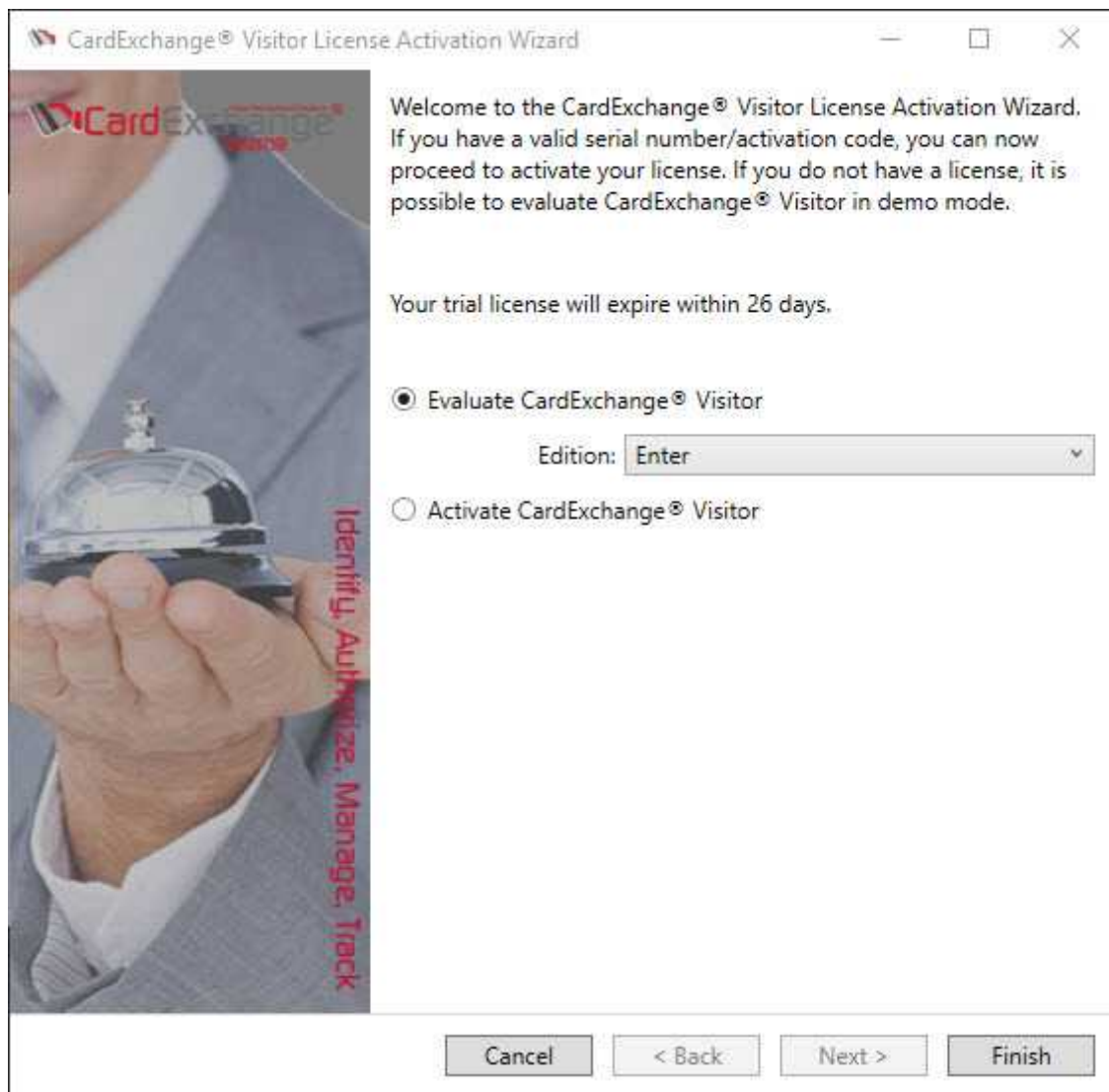
Most of the time you will be working from the main interface, shown above is the Visitors view.



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 days. 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.



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](#) ⁸ 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](#) ¹⁵ section of this Help file.

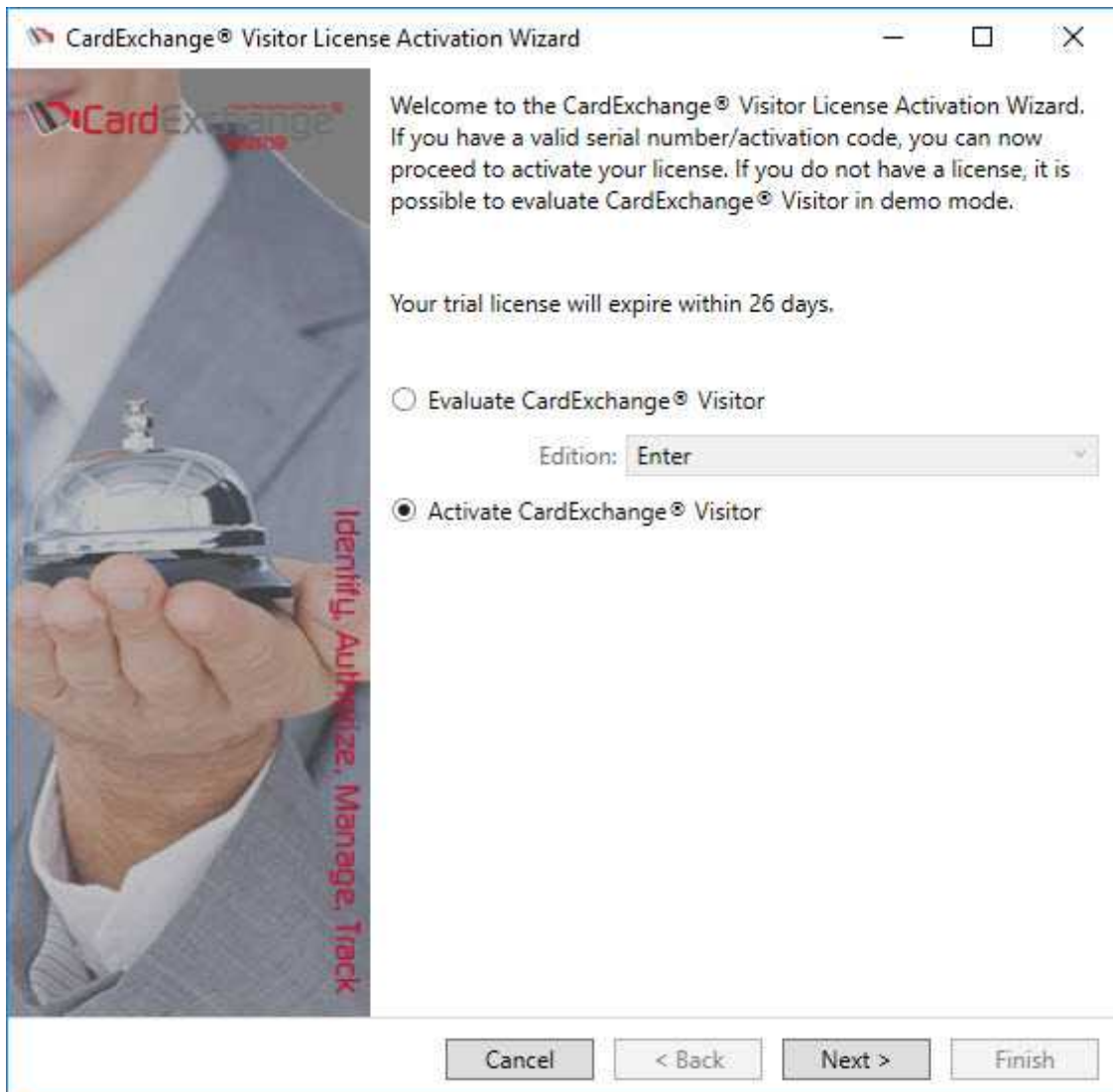
2.2 Activation and Registration

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.

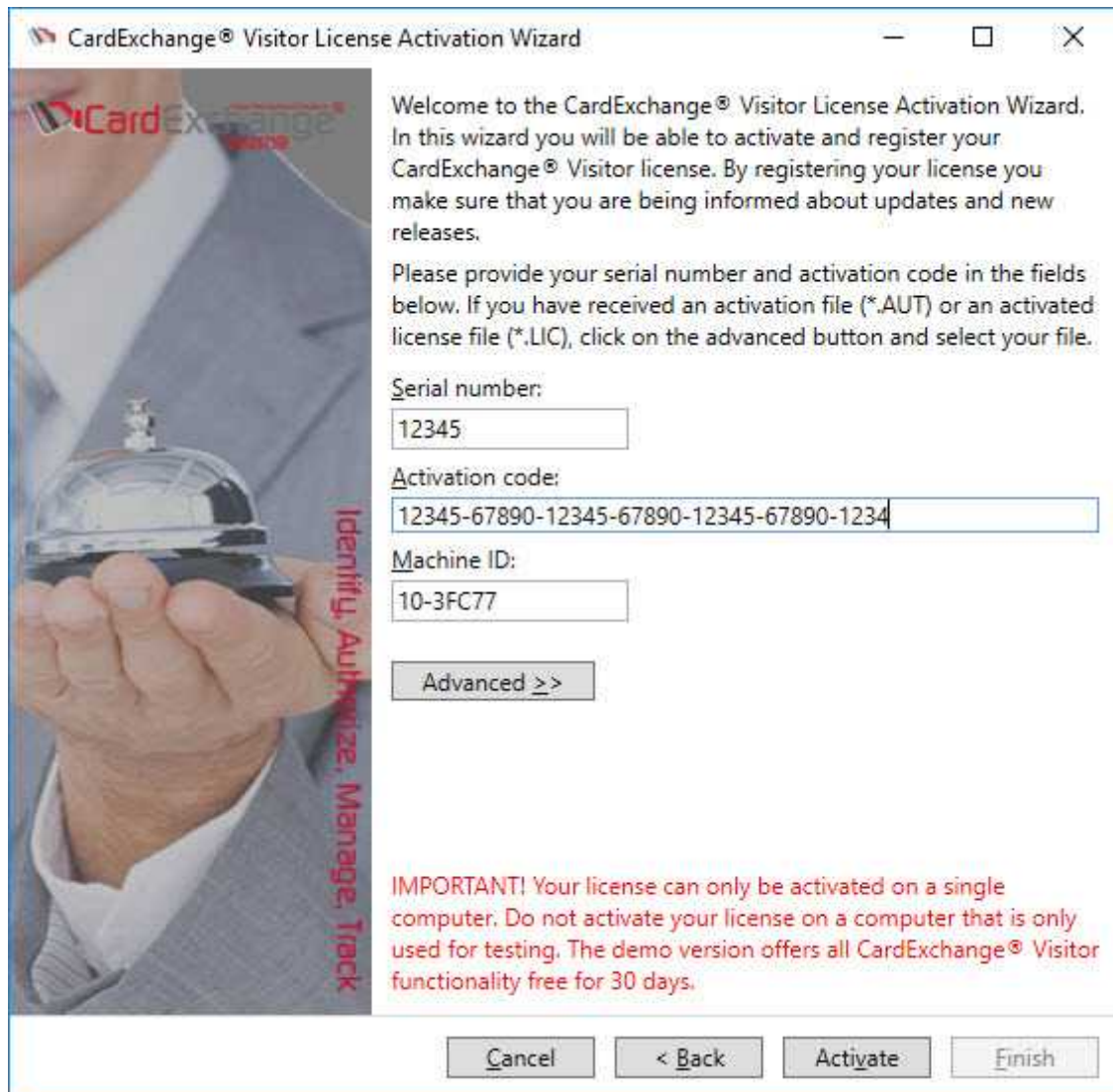
To activate CardExchange® Visitor you need to have a **Serial Number** and **Activation Code**.

The serial number is a five (5) digit number and looks like 23144. 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.



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



CardExchange® Visitor License Activation Wizard

Welcome to the CardExchange® Visitor License Activation Wizard. In this wizard you will be able to activate and register your CardExchange® Visitor 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:
12345

Activation code:
12345-67890-12345-67890-12345-67890-1234

Machine ID:
10-3FC77

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® Visitor functionality free for 30 days.

Cancel < Back Activate Finish

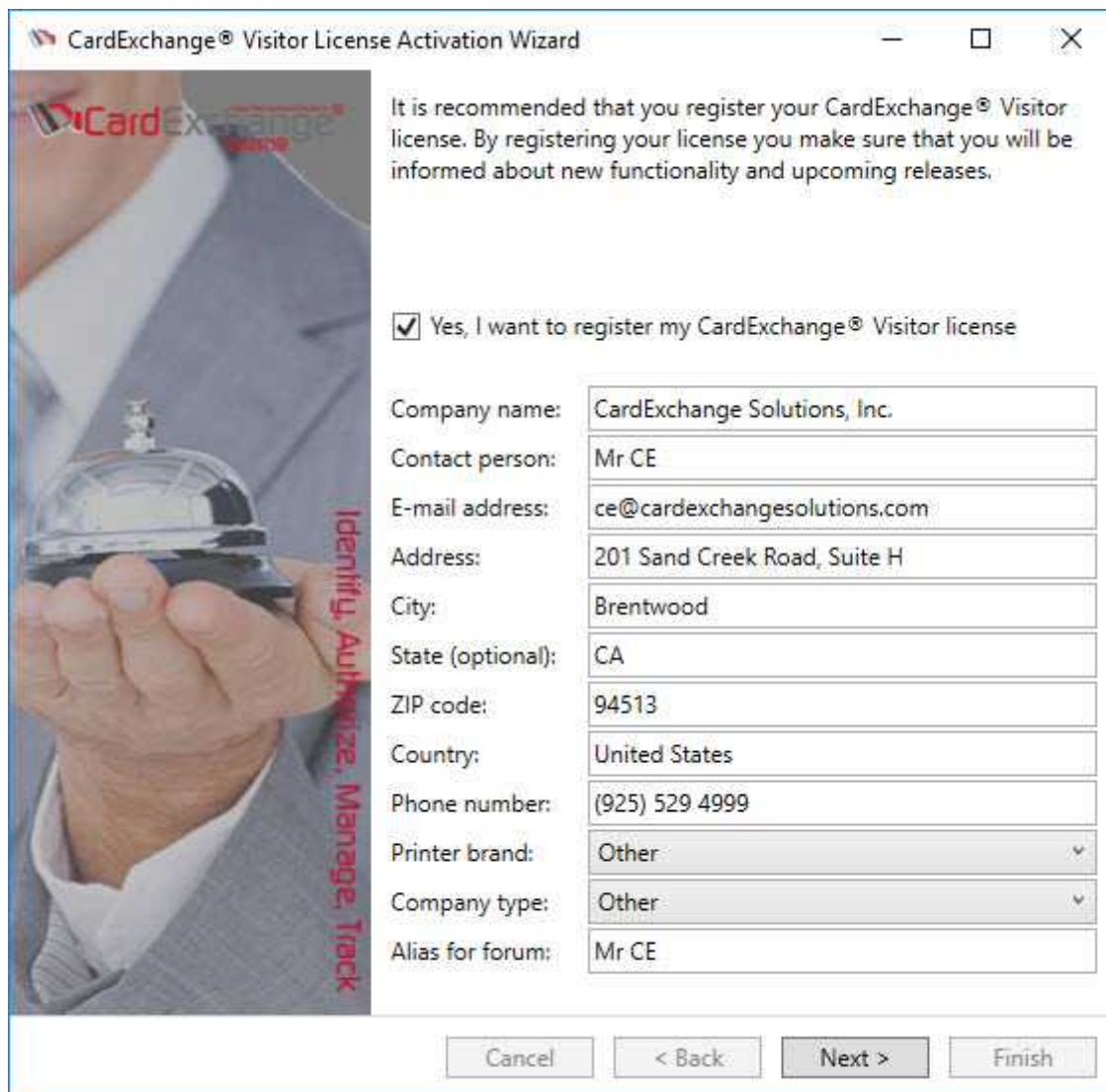
Enter your **serial number** and **activation code**.

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.

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.



The image shows a software window titled "CardExchange® Visitor License Activation Wizard". On the left is a vertical banner with a photo of a hand holding a silver bell and the text "Identify, Authenticate, Manage, Track" in red. The main area contains a message: "It is recommended that you register your CardExchange® Visitor license. By registering your license you make sure that you will be informed about new functionality and upcoming releases." Below this is a checked checkbox labeled "Yes, I want to register my CardExchange® Visitor license". To the right is a form with the following fields: Company name (CardExchange Solutions, Inc.), Contact person (Mr CE), E-mail address (ce@cardexchangesolutions.com), Address (201 Sand Creek Road, Suite H), City (Brentwood), State (optional) (CA), ZIP code (94513), Country (United States), Phone number ((925) 529 4999), Printer brand (Other), Company type (Other), and Alias for forum (Mr CE). At the bottom are four buttons: Cancel, < Back, Next >, and Finish.

Company name:	CardExchange Solutions, Inc.
Contact person:	Mr CE
E-mail address:	ce@cardexchangesolutions.com
Address:	201 Sand Creek Road, Suite H
City:	Brentwood
State (optional):	CA
ZIP code:	94513
Country:	United States
Phone number:	(925) 529 4999
Printer brand:	Other
Company type:	Other
Alias for forum:	Mr CE

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!

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

CardExchange® Visitor License Activation Wizard

After activating your license, CardExchange® Visitor gives you the opportunity to have a 30-day trial of our Business edition for free. This allows you to discover the functionality included in our higher editions. If you do not want to have this option, please uncheck the box below. Trial functionality can be disabled at any time via the main CardExchange® Visitor window.

☐ Yes, I want to have 30 days Business 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?

9/14/2016 15

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

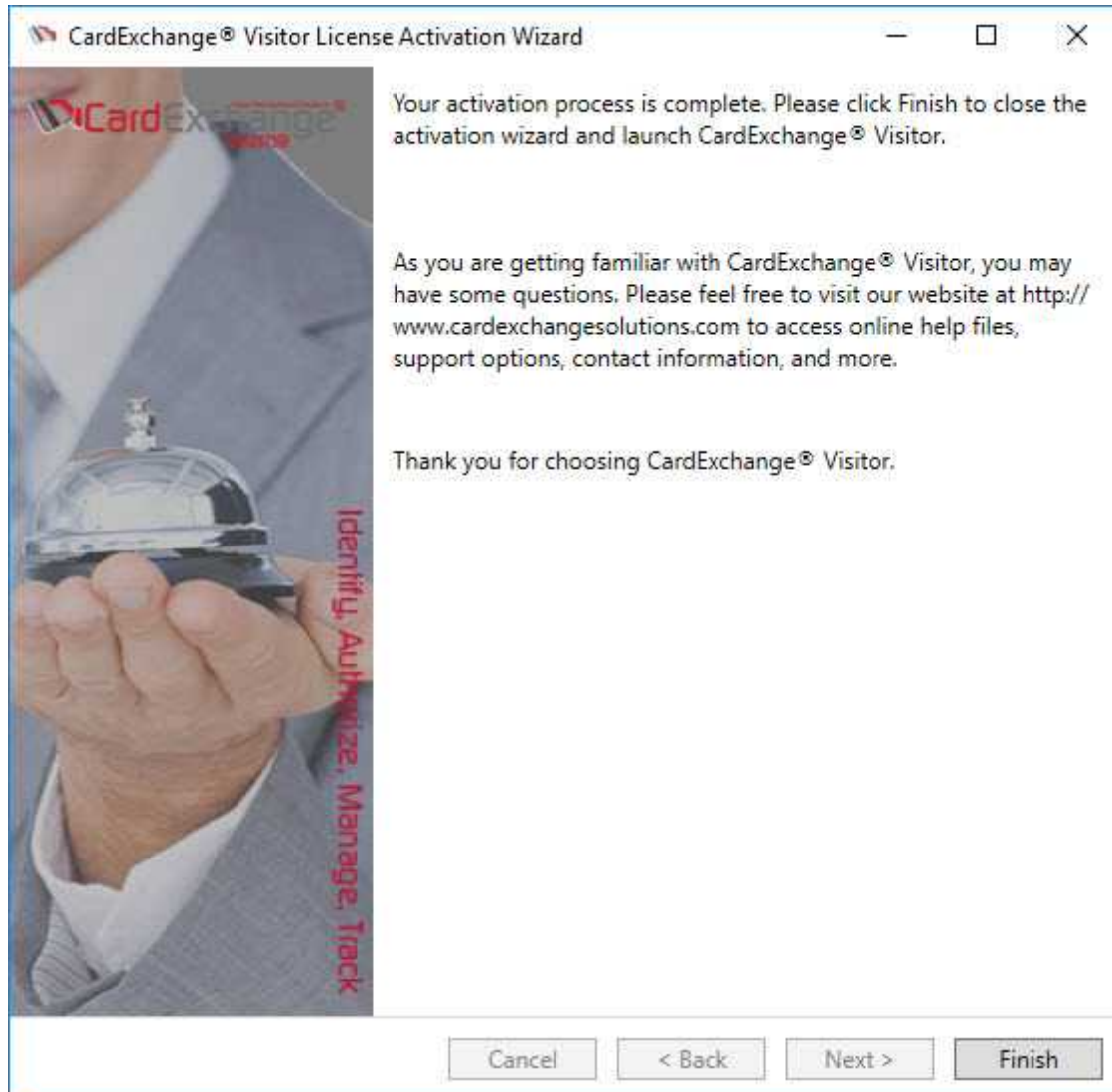
Cancel < Back Next > Finish

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.

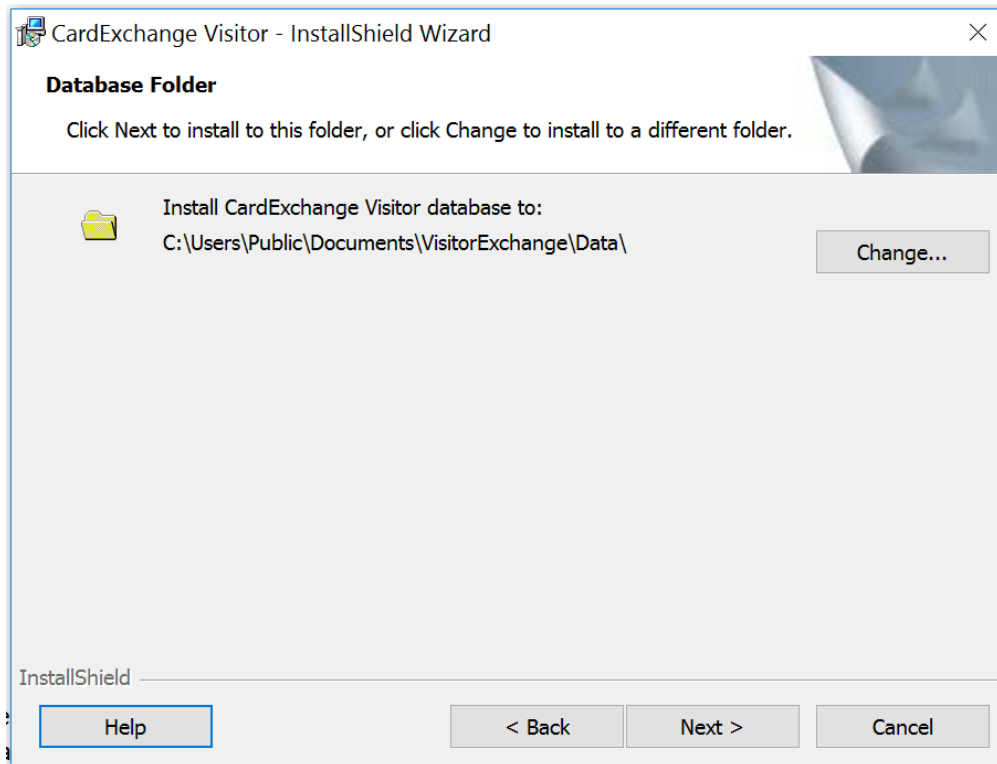
Click Next to proceed to the Final page of the registration process.



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

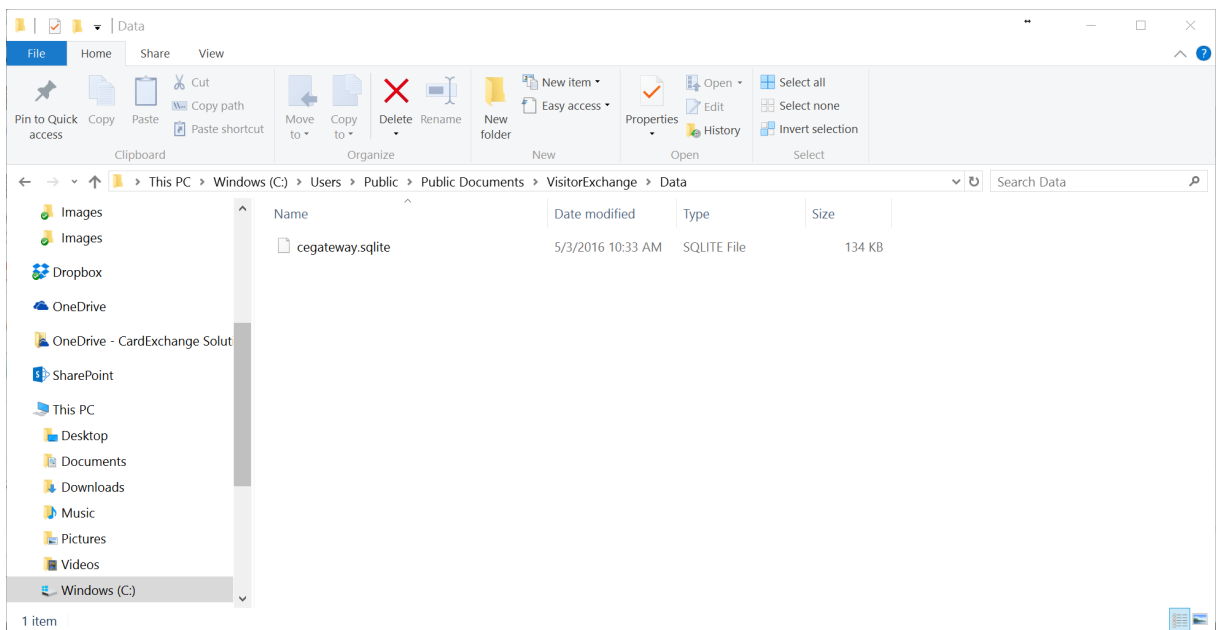
For more information about updating your registration, please visit our ["Update Your Registration Info"](#)¹⁶² section of this Help file. Want to upgrade your license to a higher edition, please visit our ["Upgrade Your License"](#)¹⁵⁸ section of this Help file.

2.3 Data Folder

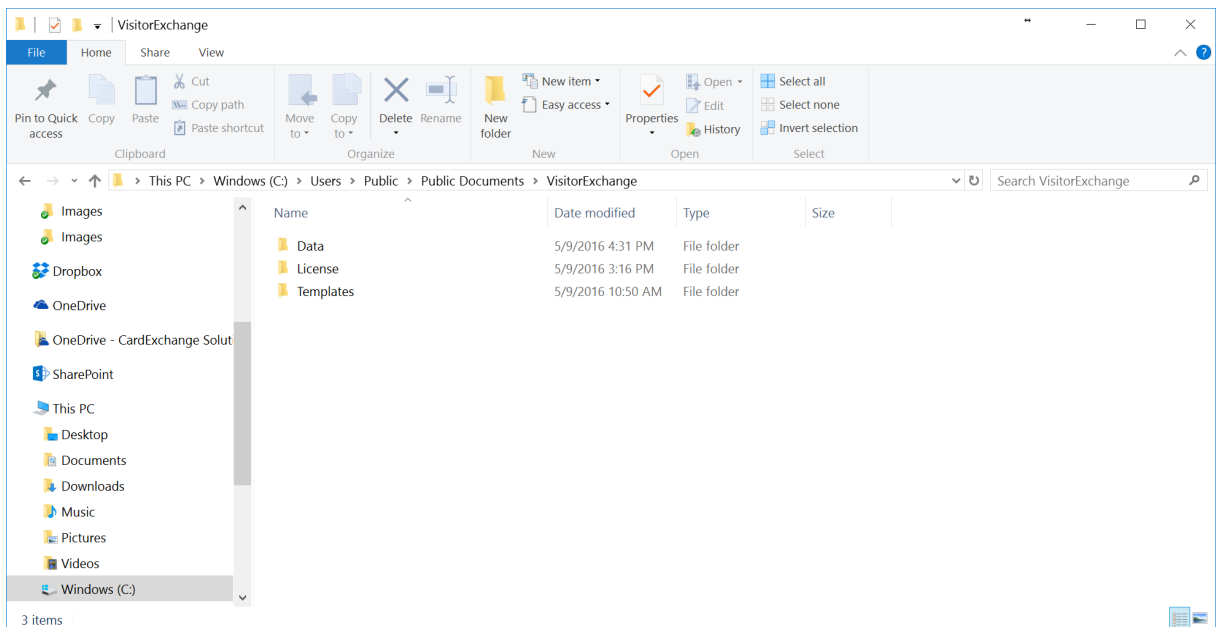


During the installation of CardExchange® Visitor you are asked to select a location for your Data folder. By default this folder is installed in the Public Documents folder under VisitorExchange.

The Data folder of CardExchange® Visitor contains the database of all your settings, visitors and events.



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 advise 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

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

2.4 Main Interface

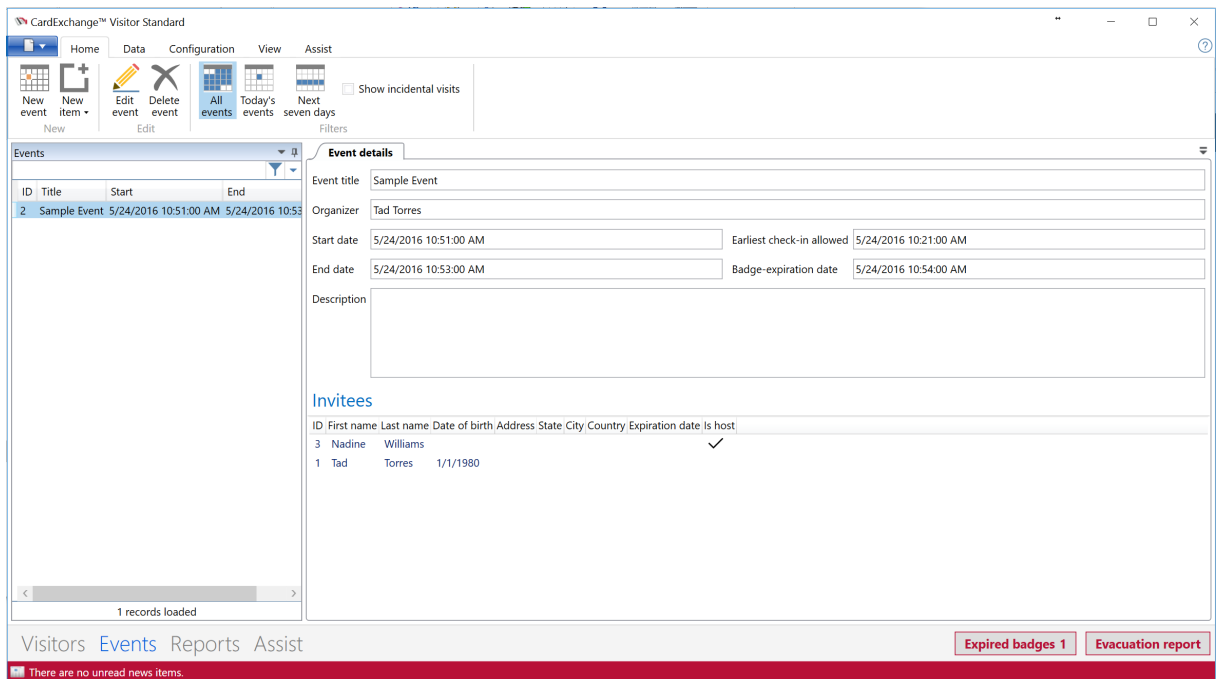
The screenshot displays the CardExchange Visitor Standard application window. The interface is divided into several sections:

- Top Ribbon:** Contains tabs for Home, Data, Photos, Signatures, Configuration, View, and Assist. The Home tab is active, showing buttons for New visitor, New item, Edit visitor, Delete visitor, Visitor groups, All visitors, Checked-in visitors, Blacklisted visitors, Check-in, Check-out, Blacklist, and Print badge.
- Visitors List:** A table on the left showing a list of visitors. The first three rows are:

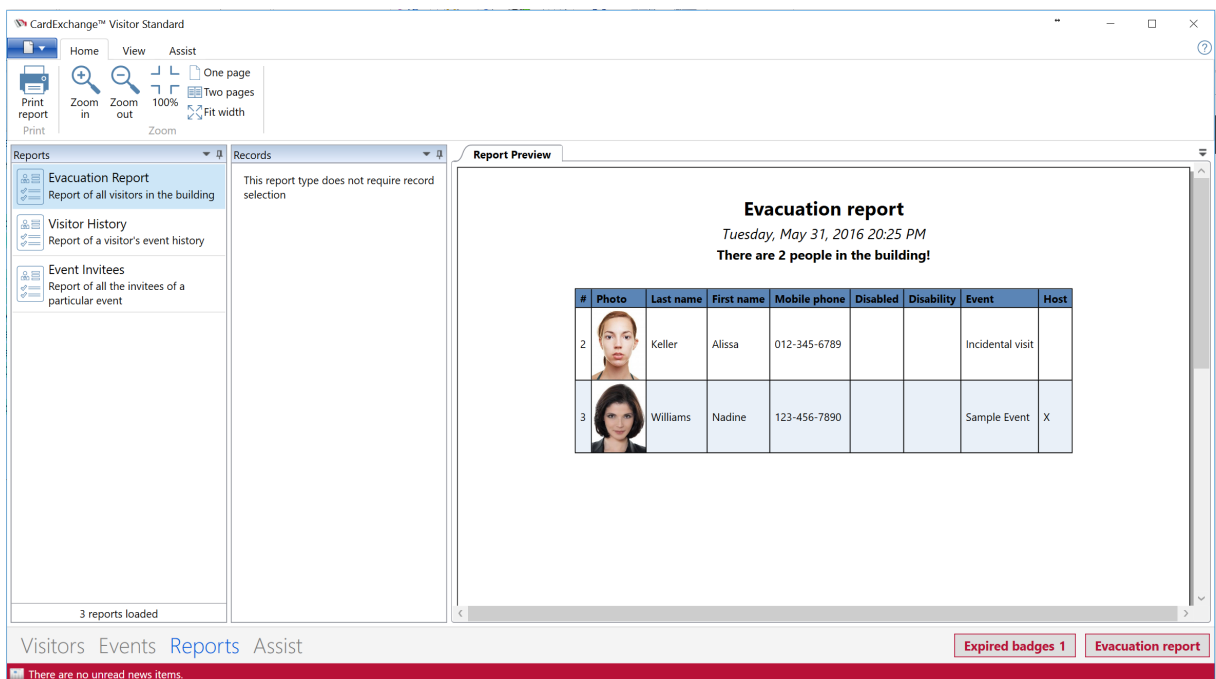
Last name	First name	Representing
Torres	Tad	CardExchange
Keller	Alissa	Security Cons
Williams	Nadine	
- Visitor details:** A form on the right showing details for the selected visitor (ID 1, Tad Torres). It includes fields for License plate, Date of birth (1/1/1980), Address, City, State, ZIP code, Country, Title (Mr), First name (Tad), Last name (Torres), Representing (CardExchange), Phone number (925-529-4999), Mobile phone number, E-mail address (sales@cardexchangesolution.com), Car (checked), and Description. There are also checkboxes for Disabled, VIP, Escort required, Blacklisted, and Arrival status.
- Badge preview:** A section showing a preview of the visitor's badge with the name Tad Torres.
- Actions:** A vertical bar on the right with buttons for New visitor, Check-in, Check-out, Blacklist, Take photo, Capture signature, and Print badge.
- Bottom Bar:** Contains tabs for Visitors, Events, Reports, and Assist. On the right, there are buttons for Expired badges 1 and Evacuation report. A status bar at the bottom indicates "There are no unread news items."

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.



Above is the Events view.



Above is the Reports view.

The screenshot displays the CardExchange™ Visitor Standard web application. The top navigation bar includes links for Refresh, Help, Forum, Video tutorials, Activation window, Register license, Compare editions, and About CardExchange™ Visitor. The main content area is titled "CardExchange™ Visitors Beta Release" and contains a "Known issues" section with a list of guidelines for reporting bugs. Below the text is an image of a hand ringing a bell with a "CHECK IN" stamp. The bottom navigation bar shows links for Visitors, Events, Reports, and Assist (which is highlighted). On the right side of the bottom bar, there are buttons for "Expired badges 1" and "Evacuation report". A status bar at the very bottom indicates "There are no unread news items."

CardExchange™ Visitor Standard

Assist

Refresh Help Forum Video tutorials Activation window Register license Compare editions About CardExchange™ Visitor

CardExchange™ Visitors Beta Release

12/28/2015 11:31:02 PM

Known issues
12/28/2015 11:31:01 PM

CardExchange™ Visitors Beta Release

Published on 12/28/2015 11:31:02 PM

The current release is intended for BETA testing of the Enter edition only. If you find anything that does not look right, is not working as expected or could be done better, please report it on our on-line ticketing system, respecting the guidelines below.

- If the issue is already mentioned in the article "Known issues", you do not need to create a ticket: we know already about it.
- If the issue is already reported by somebody else, please comment on his or her existing ticket, rather than creating a new one.
- Post all new issues in the dedicated category "CardExchange™ Visitor BETA"
- Post unrelated issues in separate tickets; that makes them way easier to manage for us.
- Please, be as clear as possible and include screen shots if that clarifies the issue.

We wish you a happy BETA testing!

Visitors Events Reports Assist

Expired badges 1 Evacuation report

There are no unread news items.

And the Assist view.

3 Working With Visitors

CardExchange™ Visitor Standard

Home Data Photos Signatures Configuration View Assist

New visitor New item Edit visitor Delete visitor Visitor groups All visitors Checked-in visitors Blacklisted visitors Check-in Check-out Blacklist Print badge

Visitors

Last name First name Representing

Torres Tad CardExchange

Keller Alissa Security Cons

Williams Nadine

3 records loaded

Badge preview

Default template

Tad Torres

Visitor details

ID 1 License plate Date of birth 1/1/1980 Visit Type Creation date 5/10/2016 Modification date 5/31/2016 Blacklist reason

Photo

Address City State ZIP code Country

Title Mr Disabled Disabled VIP Escort required Escort service Blacklisted Blacklisted Arrival status Description

First name Tad

Last name Torres

Representing CardExchange

Phone number 925-529-4999

Mobile phone number

E-mail address sales@cardexchangesolution

Car Car

Actions

New visitor Check-in Check-out Blacklist Take photo Capture signature Print badge

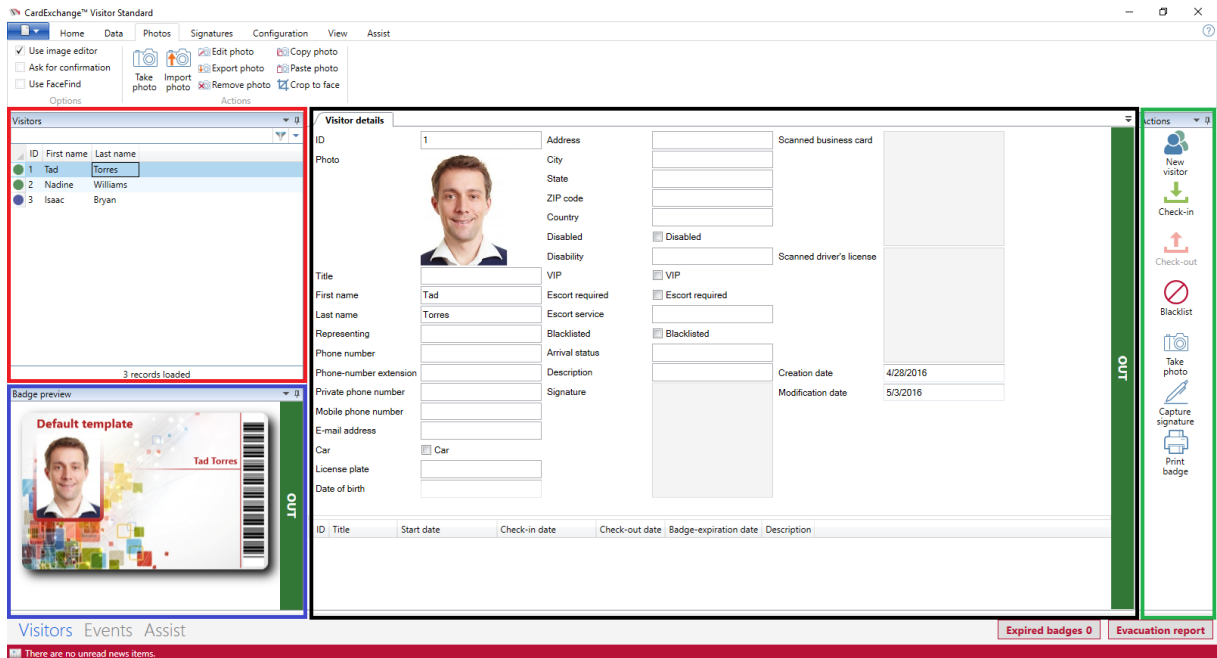
Visitors Events Reports Assist

Expired badges 1 Evacuation report

There are no unread news items.

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...

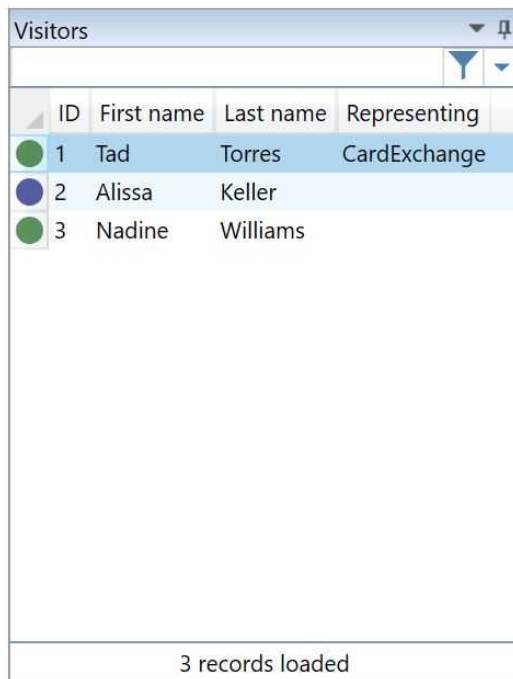
3.1 Layout



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.

3.1.1 Visitors Pane



ID	First name	Last name	Representing
1	Tad	Torres	CardExchange
2	Alissa	Keller	
3	Nadine	Williams	

3 records loaded


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-registered for an event etc...

For more info please see the [Status Markers](#) ³² section.

Record Sorting



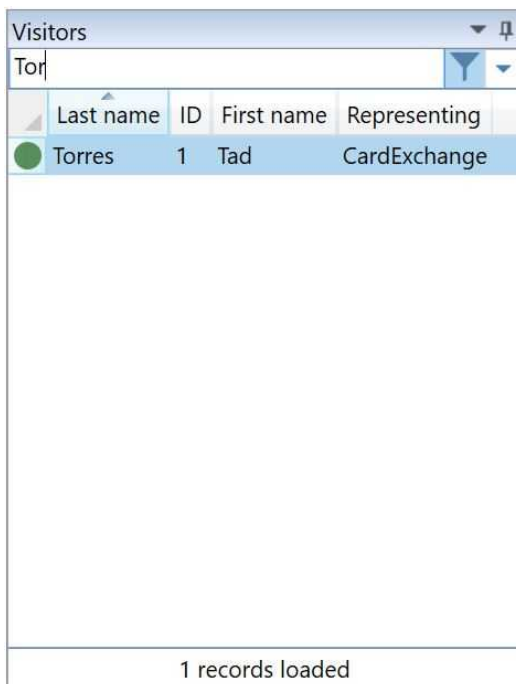
Visitors

	ID	First name	Last name	Representing
2	Alissa	Keller		
1	Tad	Torres	CardExchange	
3	Nadine	Williams		

3 records loaded

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



Visitors

Tor

Last name	ID	First name	Representing
Torres	1	Tad	CardExchange

1 records loaded

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

Visitors			
<input type="text"/>			
Last name	ID	First name	Representing
Keller	2	Alissa	
Torres	1	Tad	CardExchange
Williams	3	Nadine	
3 records loaded			



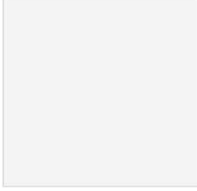
In the footer of the Visitors pane the total amount of loaded records is shown.

3.1.2 Badge-Preview Pane



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

3.1.3 Visitor Details Pane

Visitor details							
ID	1	E-mail address	sales@cardexchangesolution	Arrival status			
Photo		Car	<input type="checkbox"/> Car	Description			
		License plate		Badge-template ID	0		
		Date of birth	1/1/1980	Signature			
		Address					
		City					
		State					
Title	Mr	ZIP code					
First name	Tad	Country					
Last name	Torres	Disabled	<input type="checkbox"/> Disabled	Scanned business card			
Representing	CardExchange	Disability					
Phone number	925-529-4999	VIP	<input type="checkbox"/> VIP				
Phone-number extension		Escort required	<input type="checkbox"/> Escort required				
Private phone number		Escort service					
Mobile phone number		Blacklisted	<input type="checkbox"/> Blacklisted				

ID	Title	Start date	Check-in date	Check-out date	Badge-expiration date	Description

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](#)³²⁾ section.

3.1.4 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](#)"⁵⁹⁾ section of this Help file.

If you have the Standard edition or higher, the Capture signature button is shown. When clicking it will start the signature pad connected. In the "[Use Signatures](#)"⁷⁵⁾ 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).

3.1.5 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-registered for an event etc...

We have the following statuses:

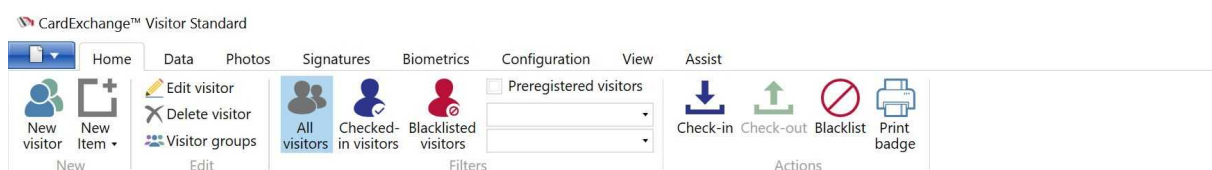
	Current Status	Status Marker	Status Bar text
1	Checked-out and not pre-registered	Green circle	OUT
2	Checked-in for an incidental visit	Blue circle	IN
3	Checked-in for an incidental visit and expired	Blue circle with blue cross	EXPIRED
4	Checked-out and pre-registered, but not yet allowed to check-in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

Visitors				
	ID	First name	Last name	Representing
	1	James	Butt	Benton, John B Jr
	2	Josephine	Darakjy	Chanay, Jeffrey A Esq
	3	Art	Venere	Chemel, James L Cpa
	4	Lenna	Paprocki	Feltz Printing Service
	5	Donette	Foller	Printing Dimensions
	6	Simona	Morasca	Chapman, Ross E Esq
	7	Mitsue	Tollner	Morlong Associates
	8	Leota	Dilliard	Commercial Press
	9	Sage	Wieser	Truhlar And Truhlar Attys
	10	Kris	Marrier	King, Christopher A Esq
	11	Minna	Amigon	Dorl, James J Esq
	12	Abel	Maclead	Rangoni Of Florence
	13	Kiley	Caldarera	Feiner Bros
	14	Graciela	Ruta	Buckley Miller & Wright
	15	Cammy	Albares	Rousseaux, Michael Esq

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

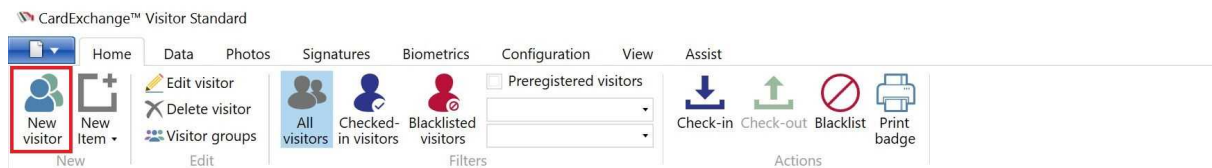
3.2 Home



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.

3.2.1 New visitor



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

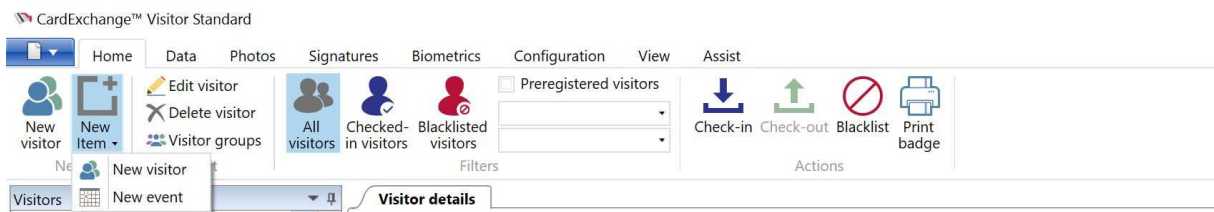
The 'New visitor' window contains the following fields and sections:

- Buttons:** Save & check-in, Save, Cancel, Scan document (ID scan).
- ID:** 0
- Photo:** Image capture area.
- Date of birth:** 15
- Signature:** Image capture area.
- Scanned driver's license:** Image capture area.
- Scanned business card:** Image capture area.
- Fingerprint image:** Image capture area.
- Fingerprint template:** Image capture area.
- Creation date:** 15
- Modification date:** 15
- Form Fields:**
 - Title
 - First name
 - Last name
 - Representing
 - Phone number
 - Phone-number extension
 - Private phone number
 - Mobile phone number
 - E-mail address
 - Car
 - License plate
 - Address
 - City
 - State
 - ZIP code
 - Country
 - Disabled
 - Disability
 - VIP
 - Escort required
 - Escort service
 - Blacklisted
 - Arrival status
 - Description
 - Badge-template ID: 0

Here you can enter all the details for the visitor, capture their photo, signature and biometric image (Depending on your edition).

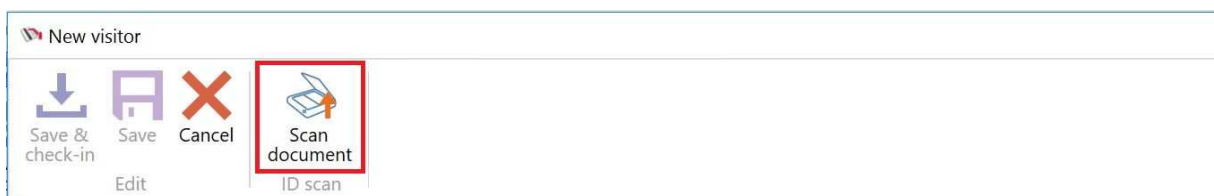
You can also populate the fields by clicking on [Scan document](#)³⁵ and scanning the visitors drivers license or passport.

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.

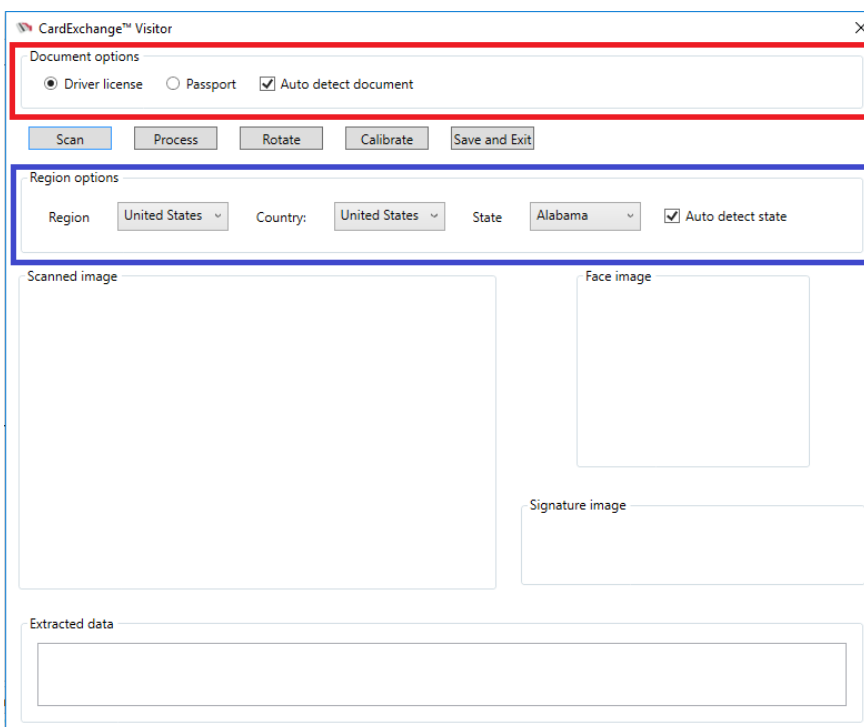


Clicking on **New item** gives you the choice of creating a new visitor or a [New event](#)¹²².

3.2.1.1 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.

CardExchange™ Visitor

Document options

☒ Driver license ☐ Passport ☐ Auto detect document

Scan Process Rotate Calibrate Save and Exit


Region options

Region: United States Country: United States State: New York ☒ Auto detect state


Scanned image

License: 555.jpg 553x341 pixels

1 of 1 photo



Face image



Signature image

Sample License Document


Extracted data


Name - SAMPLE LICENSE DOCUMENT
 First Name - SAMPLE
 Middle Name - LICENSE
 Last Name - DOCUMENT
 Name Suffix -
 ID - 012 345 678
 DOB - 06-09-85
 Issue Date - 09-30-08
 Expiration Date -
 Eye Color - IR H
 Hair Color -
 Height - 9-
 Weight -
 Address - 2345ANYPLACEAVE
 City - ANYTOWN
 Zip - 12345
 State - NY
 Class - CLESS
 Restriction -
 Sex - F
 License - 012 345 678
 Audit -
 Endorsements -
 Fee -
 Social Security -




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

New visitor

Save & check-in | Save | Cancel | Scan document | ID scan

ID: 0
 Photo: 
 Title:
 First name: SAMPLE
 Last name: DOCUMENT
 Representing:
 Phone number:
 Phone-number extension:
 Private phone number:
 Mobile phone number:
 E-mail address:
 Car: ☐ Car
 License plate:
 Date of birth: 9/5/1985
 Address: 2345ANYPLACEAVE
 City: ANYTOWN

State: NY
 ZIP code: 12345
 Country:
 Disabled: ☐ Disabled
 Disability:
 VIP: ☐ VIP
 Escort required: ☐ Escort required
 Escort service:
 Blacklisted: ☐ Blacklisted
 Arrival status:
 Description:
 Badge-template ID: 0
 Signature: 

Scanned business card: 
 Scanned driver's license: 
 Fingerprint image: 
 Fingerprint template:
 Creation date: 1/5
 Modification date: 1/5

ID	Title	First name	Last name	Representing	Phone number	Phone-number extension	Private phone number	Mobile phone number	E-mail address	Car	License plate	Date of birth	Address	City	State	ZIP code	Country	Disabled
0		SAMPLE	DOCUMENT							<input type="checkbox"/>		9/5/1985	2345ANYPLACEAVE	ANYTOWN	NY	12345		<input type="checkbox"/>

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

3.2.2 Visitor Groups

ID	Name
2	Group 1

ID	2
Name	Group 1
Description	Demo
Creation date	5/23/2016
Modification date	

Visitors

ID	First name	Last name	Date of birth	Address	State	City	Country
1	Tad	Torres	1/1/1980				
3	Nadine	Williams					

0 records loaded

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](#)⁴⁶ 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.

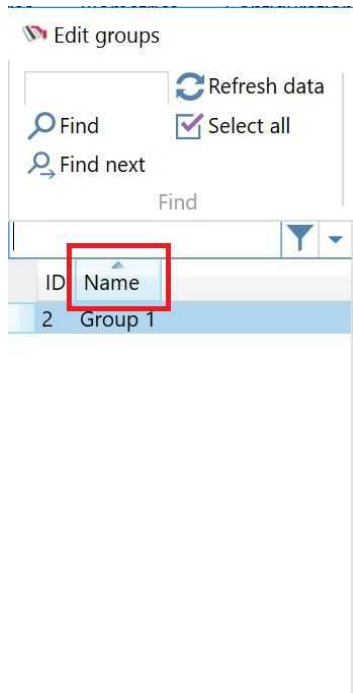
You can also check-in/check-out all visitors within that group as one action instead of individually.

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.

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



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

ID	Name
2	Group 1

1 records loaded

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

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.

3.2.2.1 Find

The screenshot shows the 'Edit groups' window. A red box highlights the 'Find' and 'Find next' buttons in the top-left corner. The window is divided into two main sections. The left section contains a table with columns 'ID' and 'Name', which is currently empty. Below this table, it states '0 records loaded'. The right section contains a form for editing a group. The form fields are: 'ID' (0), 'Name' (Group 1), 'Description' (Demo), 'Creation date' (15), and 'Modification date' (15). Below the form is a 'Visitors' section with a table header: 'ID', 'First name', 'Last name', 'Date of birth', 'Address', 'State', 'City', 'Country'. The table is currently empty. At the bottom left, it says '0 records loaded'.

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).

The screenshot shows the 'Find' dialog box. It has a title bar with a red icon and the word 'Find'. Below the title bar is a text input field labeled 'Find what:'. At the bottom are two buttons: 'OK' and 'Cancel'.

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. 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.

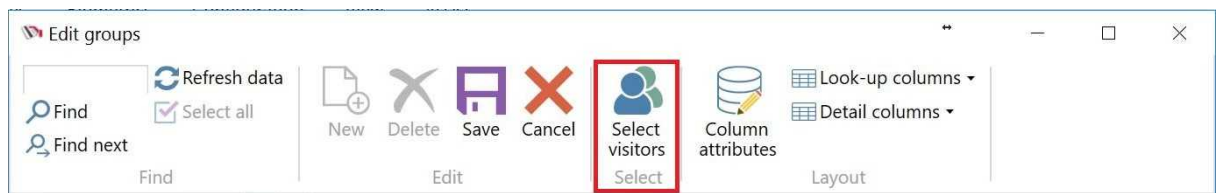
With this **Find** function, all elements in the groups list remain visible. Any restrictions to the number of records that are displayed, which would normally apply as a result of what you have entered in the text field, are overruled.

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.

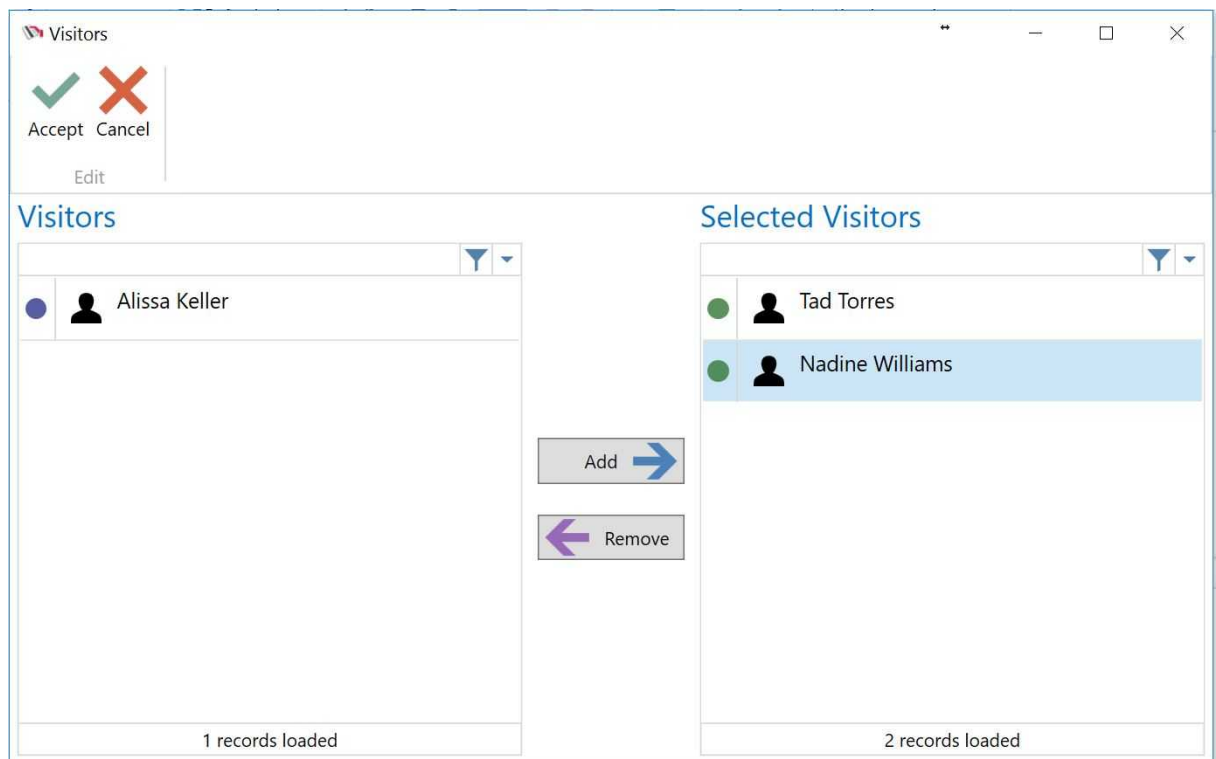
3.2.2.2 Adding Visitor Groups

The screenshot shows the 'Edit groups' window. The toolbar contains the following buttons: New (document with plus), Delete (X), Save (floppy disk), and Cancel (X). These four buttons are enclosed in a red rectangular box. Below the toolbar, there is a form for adding a new group. The form has the following fields: ID (text box with '0'), Name (text box with 'Group 1'), Description (text box with 'Demo'), Creation date (calendar icon with '15'), and Modification date (calendar icon with '15'). At the bottom of the window, there is a section titled 'Visitors' with a table header: ID, First name, Last name, Date of birth, Address, State, City, Country. The table is currently empty. The status bar at the bottom left indicates '0 records loaded'.

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 for 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.

Edit groups

Find: Find, Find next | Refresh data, Select all | New, Delete, Save, Cancel | Select visitors | Column attributes | Look-up columns, Detail columns

ID	Name
2	Group 1

0 records loaded

Details for Group 1:

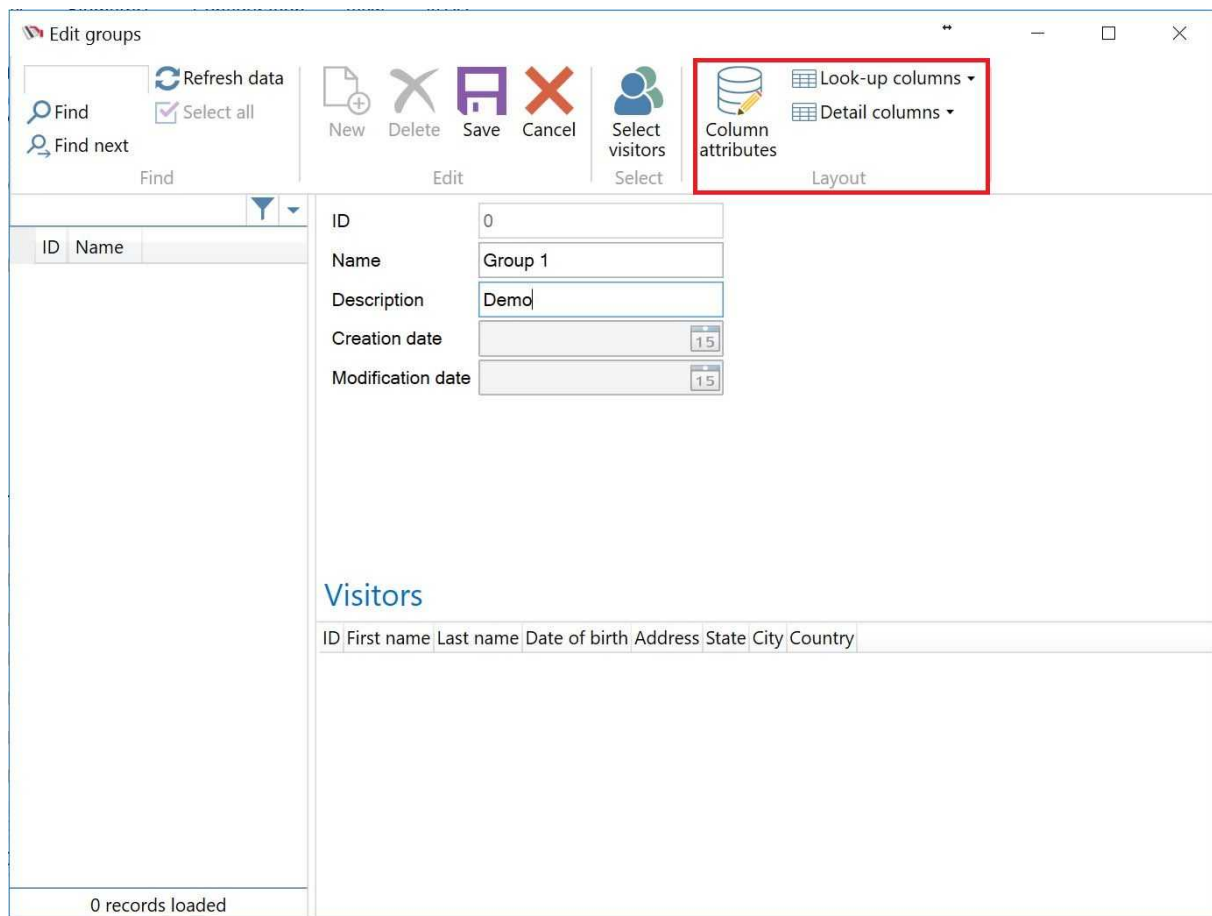
ID: 2
 Name: Group 1
 Description: Demo
 Creation date: 5/23/2016
 Modification date:

Visitors

ID	First name	Last name	Date of birth	Address	State	City	Country
1	Tad	Torres	1/1/1980				
3	Nadine	Williams					

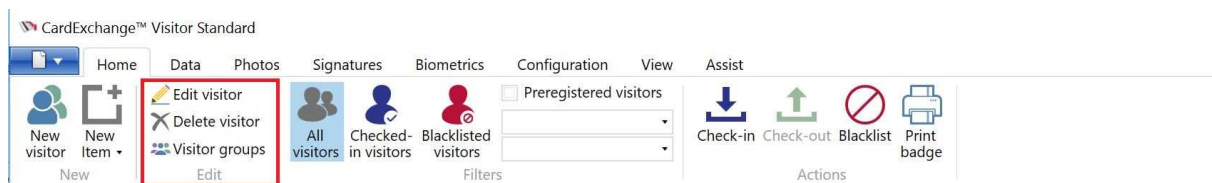
The last step is to click on Save to save the new group, you can also edit groups using the same method above to add/remove visitors.

3.2.2.3 Layout



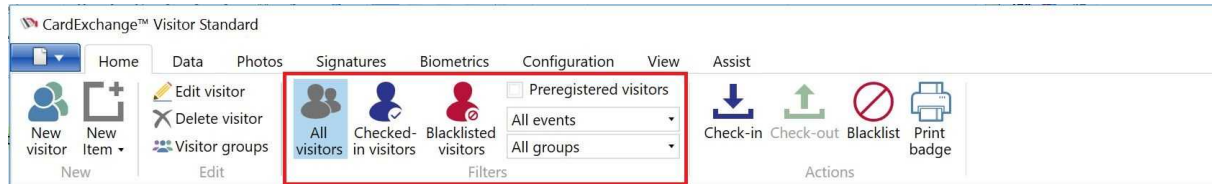
Under the Layout section of the ribbon it is possible to edit the column attributes, as well as the look-up columns and detail columns that are displayed.

3.2.3 Edit



In the Edit section you have options to [Edit visitor](#)^[54], [Delete visitor](#)^[55] and [Visitor groups](#)^[38].

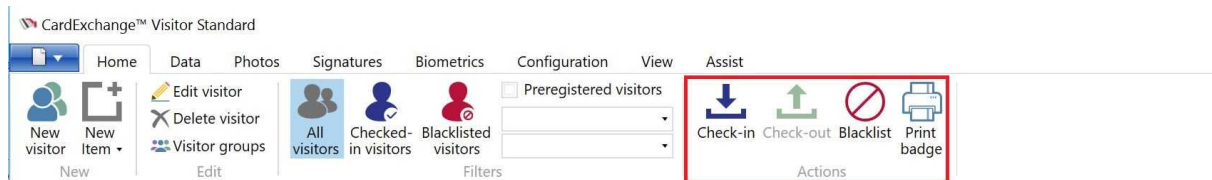
3.2.4 Filters



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)

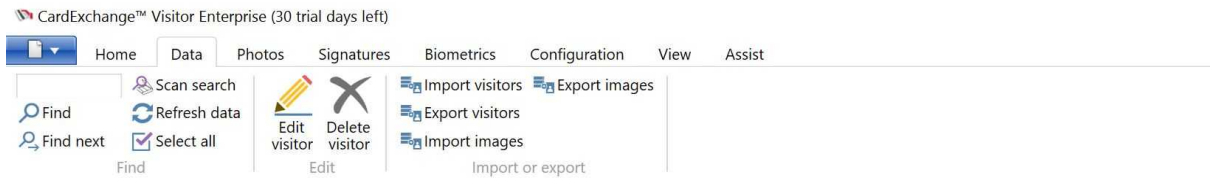
3.2.5 Actions



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

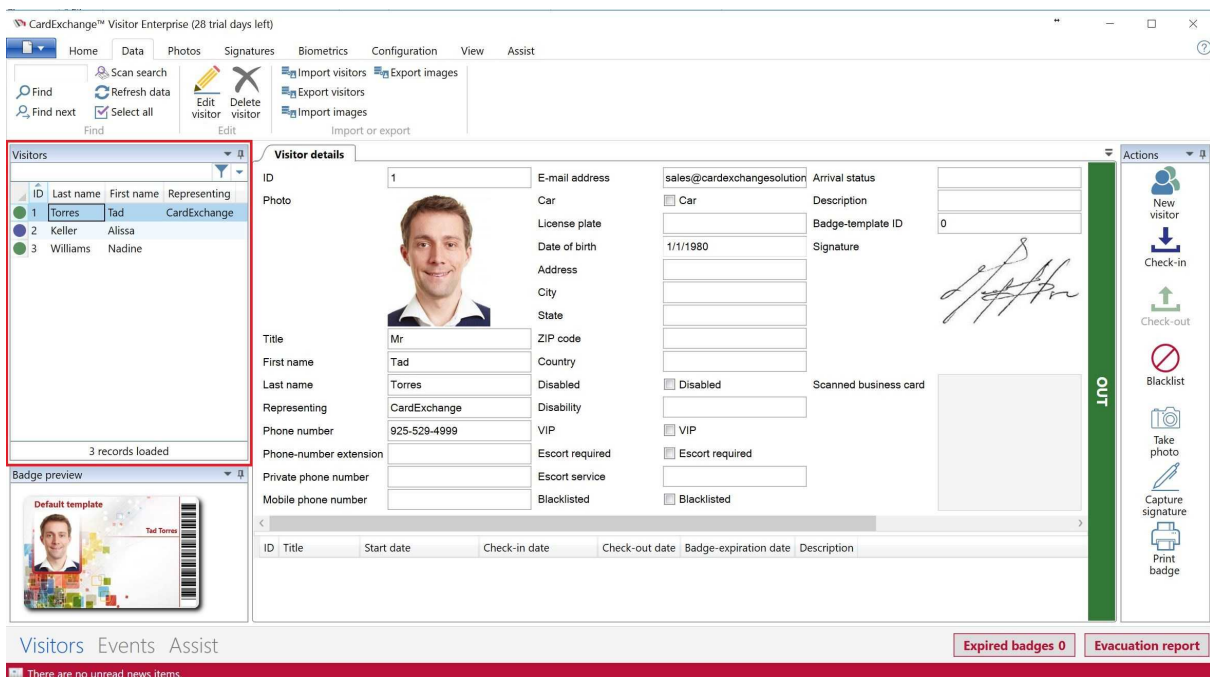
3.3 Data



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.

3.3.1 Record Lookup



The simplest way of searching for the correct record is to use the [Visitors pane](#)²⁷ 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](#)²⁷ may be sorted in various ways and is not necessarily alphabetical. You must take this into account when searching for a record.

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









	ID	First name	Last name	Representing
	2	Alissa	Keller	
	1	Tad	Torres	CardExchange
	3	Nadine	Williams	

3 records loaded







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

Visitors						
Tor						
	Last name	ID	First name	Representing		
	Torres	1	Tad	CardExchange		
1 records loaded						

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

Visitors					
					
	Last name	ID	First name	Representing	
	Keller	2	Alissa		
	Torres	1	Tad	CardExchange	
	Williams	3	Nadine		
3 records loaded					

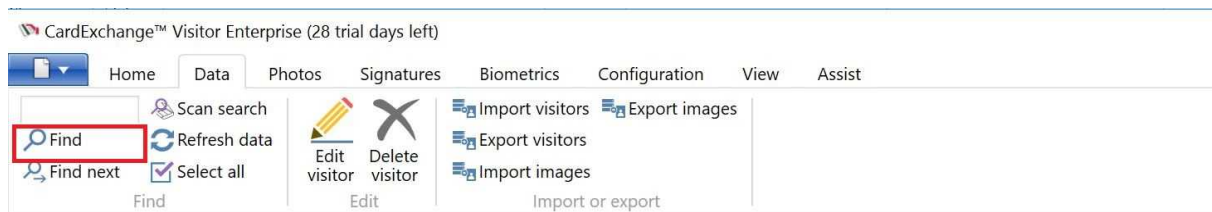
In the footer of the Visitors pane the total amount of loaded records is shown.

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:

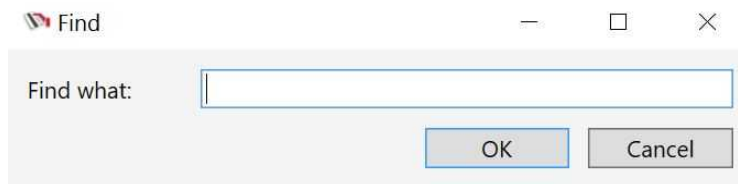
- Finding names using the **Find section** in the **Data** tab,
- Finding names using the **Keyboard**
- Finding names using the Database Filters

The first two methods will be explained in the following sections. For an explanation of the database filters, please refer to the section [Filters](#)⁴⁶ of this Help file.

3.3.1.1 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.

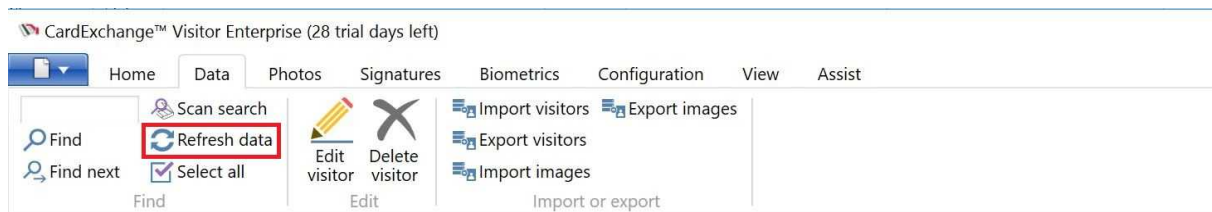
The advantage of searching in this way is that the text you enter does not need to be at the start of an element in the events pane. The search does not make a distinction between uppercase and lowercase characters.

With this **Find** function, all elements in the [Visitors pane](#)^[27] 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.

3.3.1.2 Using Keyboard

The **find** functions that have been discussed in the section [Using Find](#)^[50] 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.

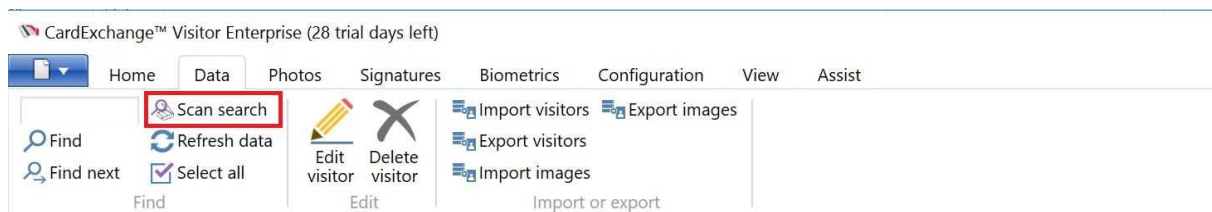
3.3.1.3 Refresh Data



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.

3.3.1.4 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.

CardExchange™ Visitor

Document options

☒ Driver license ☐ Passport ☒ Auto detect document

Scan Process Rotate Calibrate Save and Exit

Region options

Region: United States Country: United States State: Alabama ☒ Auto detect state

Scanned image

Face image

Signature image

Extracted data

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.

CardExchange™ Visitor

Document options

☒ Driver license ☐ Passport ☒ Auto detect document

Scan Process Rotate Calibrate Save and Exit

Region options

Region: United States Country: United States State: Alabama ☒ Auto detect state

Scanned image

Face image

Signature image

Extracted data

Scanning Progress

Scanning 50%

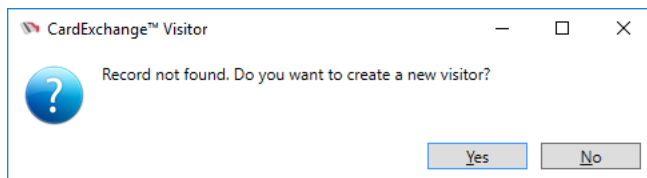
Cancel

Once scanning has completed the dialog will close.

The screenshot displays the CardExchange™ Visitor Business application. The interface includes a menu bar (Home, Data, Photos, Signatures, Biometrics, Configuration, View, Assist) and a toolbar with various actions like Find, Scan search, Refresh data, Select all, Edit visitor, Delete visitor, Import visitors, Export visitors, Export images, Import images, and Import or export. The main area is divided into two panes: 'Visitors' and 'Visitor details'. The 'Visitors' pane shows a list of visitors with columns for ID, First name, Last name, and Re. The 'Visitor details' pane shows the details for visitor 1, including a photo, personal information, and scanned documents. The bottom status bar shows 'Expired badges 0' and 'Evacuation report'.

ID	Title	Start date	Check-in date	Check-out date	Badge-expiration date	Description
1	Incidental visit	5/23/2016 5:31:52 PM	5/23/2016 5:31:53 PM			

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.

CardExchange™ Visitor Business

Home Data Photos Signatures Biometrics Configuration View Assist

Find Find next Refresh data Select all Edit visitor Delete visitor Import or export

Visitors Scan search Search visitor by scanning his document using the selected ID scanner.

1 ID First name SAMPLE

1 SAMPLE

Title

First name SAMPLE

Last name DOCUMENT

Representing

Phone number

Phone-number extension

Private phone number

Mobile phone number

E-mail address

Car ☐ Car

License plate

Date of birth

Address 2345ANYPLACEAVE

City ANYTOWN

State NY

ZIP code 12345

Country

Disabled ☐ Disabled

VIP ☐ VIP

Escort required ☐ Escort required

Escort service

Blacklisted ☐ Blacklisted

Arrival status

Description

Badge-template ID 0

Signature Sample License Document

Scanned business card

Scanned driver's license

Fingerprint image

Fingerprint template

Creation date 5/23/2016

Modification date

ID Title Start date Check-in date Check-out date Badge-expiration date Description

1 Incidental visit 5/23/2016 5:31:52 PM 5/23/2016 5:31:53 PM

0 records loaded

Visitors Events Assist

Expired badges 0 Evacuation report

There are no unread news items.

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

3.3.2 Editing Visitor's

CardExchange™ Visitor Enterprise (28 trial days left)

Home Data Photos Signatures Biometrics Configuration View Assist

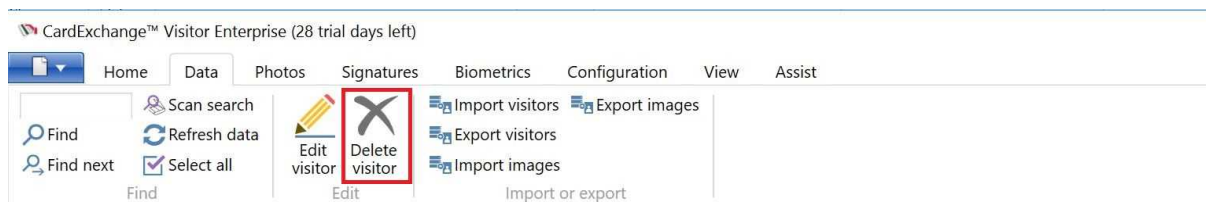
Find Find next Refresh data Select all Edit visitor Delete visitor Import or export

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.

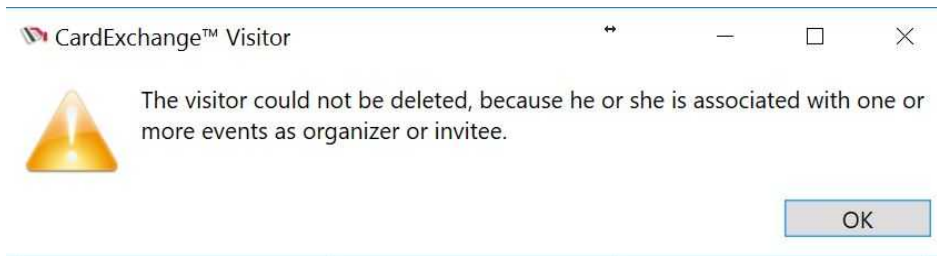
If you clicked on Edit visitor by accident, or you decided that a change was not required you can simply click on the Back button.

3.3.3 Deleting Visitor's



A database record can be deleted in three steps:

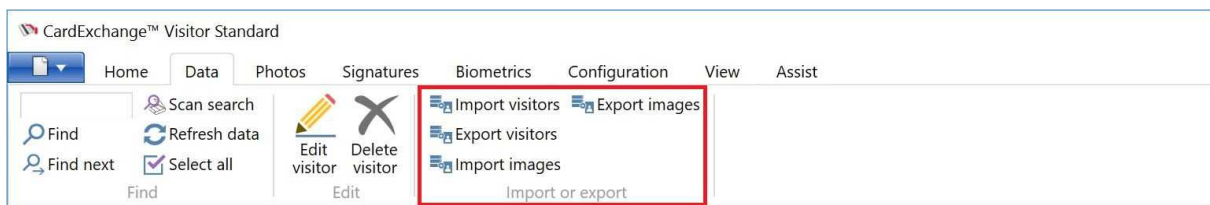
- First select the visitor from the Visitors pane that you wish to delete.
- Then either click on Delete visitor from either the Data tab or the Home tab.
- Say **Yes** to the question if you really want to delete the record. Say **No** if you do not want that.



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.

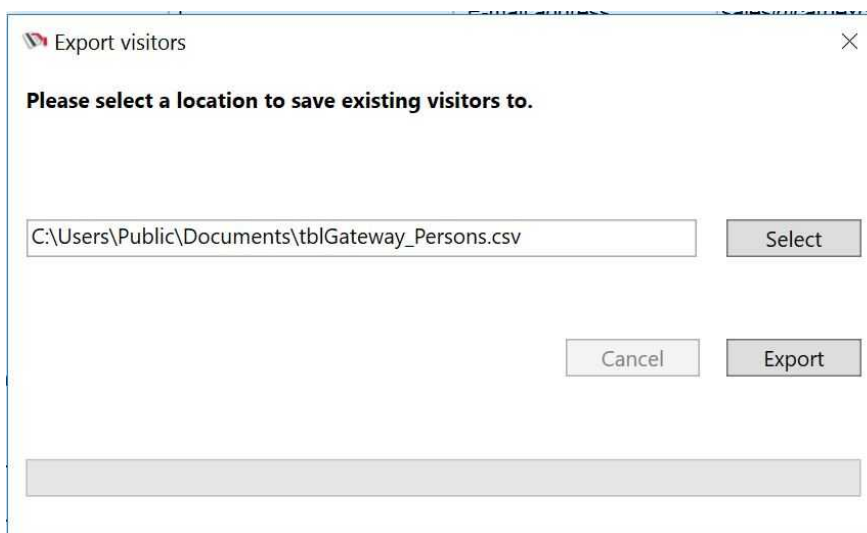
If you try to delete a visitor that has already been checked-in or assigned to an event you will get the above message.

3.3.4 Import or Export



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

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.

Importing Visitors

Bulk records import

File path: C:\Desktop\New folder\DataToImport.csv Select file

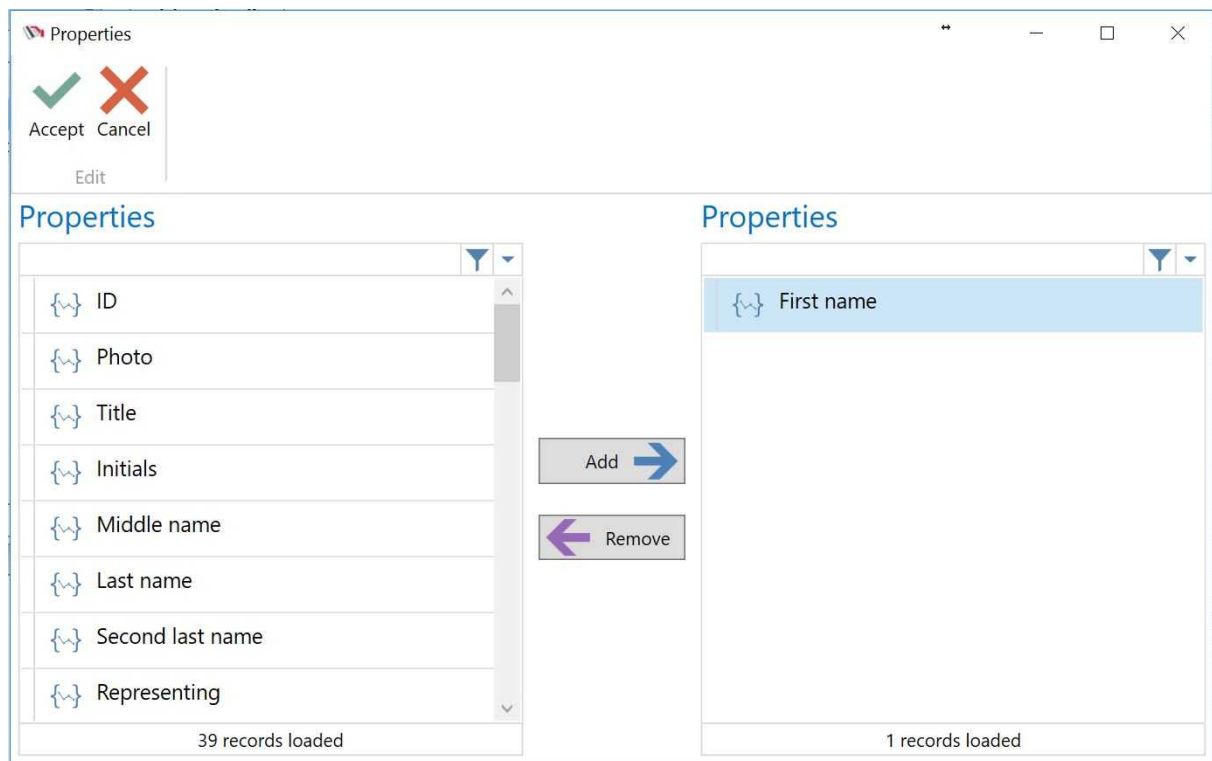
Fields

Edit	Mapped property	CSV header	Example	Example	Example
Change	ID	IDNumber	001		
Change	Title	Title	Mr		
Map	Unmapped	Forname	Tad		
Change	Last name	Surname	Torres		
Change	Representing	Company	CardExchange Solutions		
Change	Phone number	Phone	925-529-4999		
Change	Mobile phone number	Mobile	011-223-445		
Change	E-mail address	Email	sales@cardexchangesolutions.com		
Change	License plate	CarReg			
Change	Date of birth	DOB			

Import Close

When clicking on Import visitors you will be prompted to select the location for the csv file to be imported from, once selected 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 few entries 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.



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

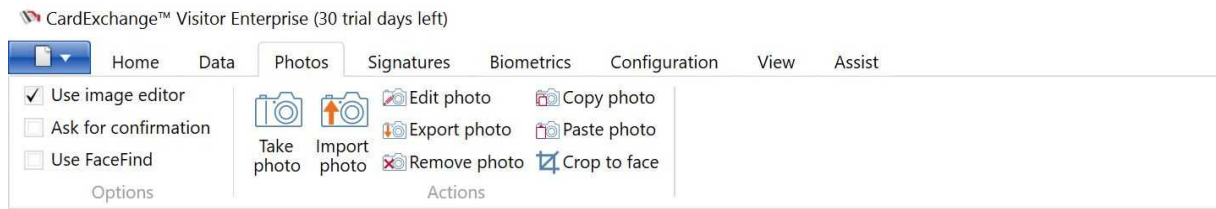
Exporting Images

When clicking on Export images you will get the choice of images to export (Photos/signatures etc..) and you can choose the image location to export them to. Images are exported in the .jpg file format.

Importing Images

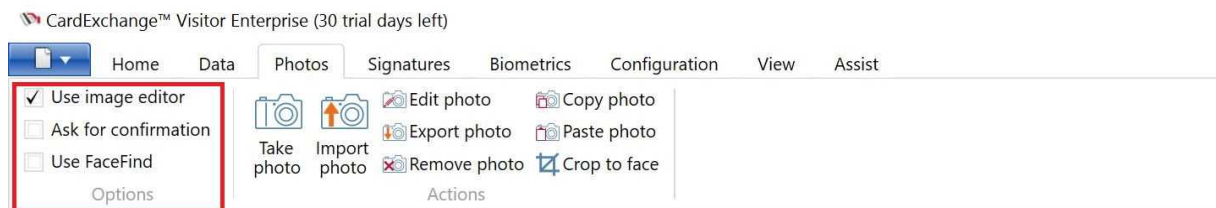
When clicking on Import images you will get the choice of images to import (Photos/signatures etc..) and you can choose the image location to export them from.

3.4 Photos



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

3.4.1 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

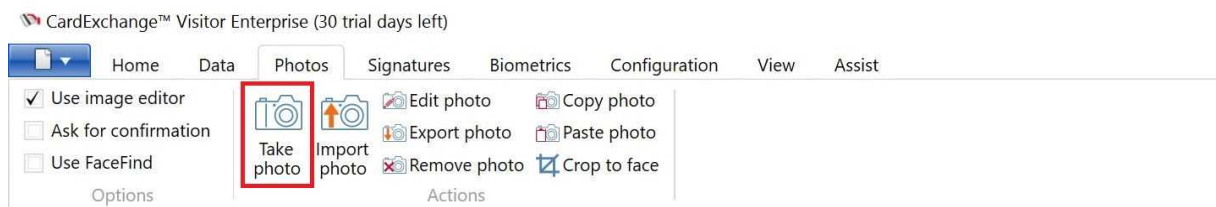
Ask for confirmation before storing the captured photo

Use FaceFind

Use the FaceFind option automatically crop the photo to the persons face

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

3.4.2 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.

CardExchange™ Visitor Enterprise (30 trial days left)

Home Data Photos Signatures Biometrics Configuration View Assist Edit visitor

Find Scan search Find Refresh data Find next Select all New Delete visitor Save Cancel Back Scan document ID scan

Visitors

ID	First name	Last name	Representing
1	Tad	Torres	CardExchange
2	Alissa	Keller	
3	Nadine	Williams	

3 records loaded

Badge preview

Visitor details

ID: 1

Photo:

E-mail address: sales@cardexchangesolution

Car: ☐ Car

License plate:

Date of birth: 1/1/1980

Address:

City:

State:

ZIP code:

Country:

Disabled: ☐ Disabled

Disability:

VIP: ☐ VIP

Escort required: ☐ Escort required

Escort service:

Blacklisted: ☐ Blacklisted

Arrival status:

Description:

Badge-template ID: 0

Signature:

Scanned business card:

Actions

New visitor

Check-in

Check-out

Blacklist

Take photo

Capture signature

Print badge

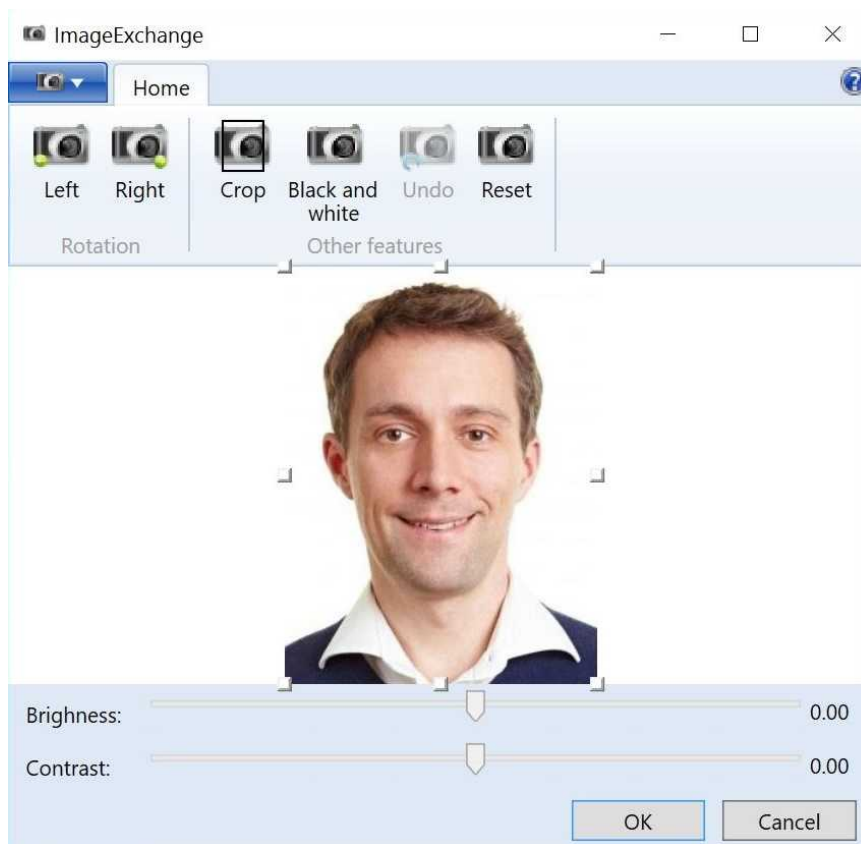
Visitors Events Assist

Expired badges 0

Evacuation report

There are no unread news items.

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



Please see the [Using Image Tools](#)⁷² 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.

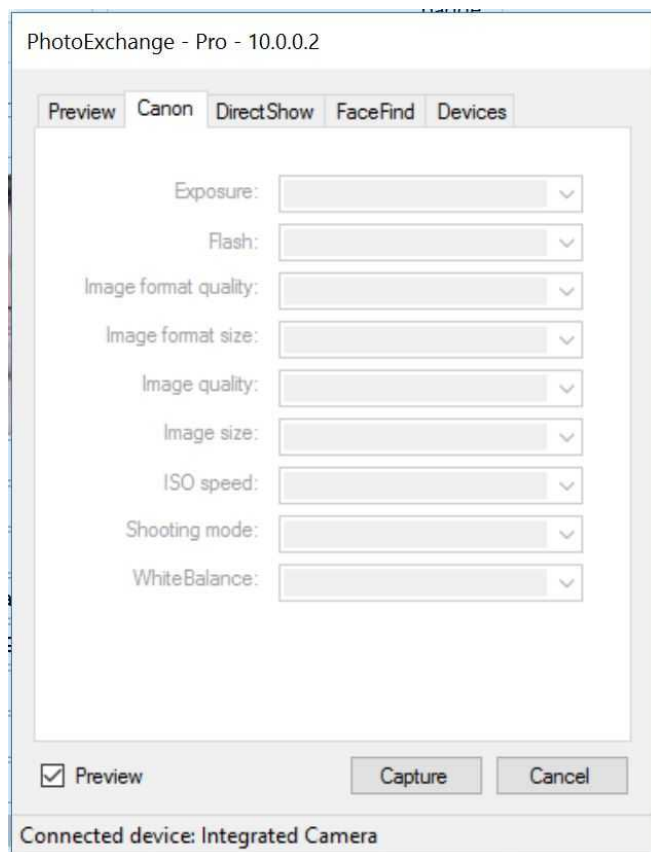
3.4.2.1 PhotoExchange

When taking a photo the PhotoExchange window will be shown to handle the acquisition of the image from the connected camera.

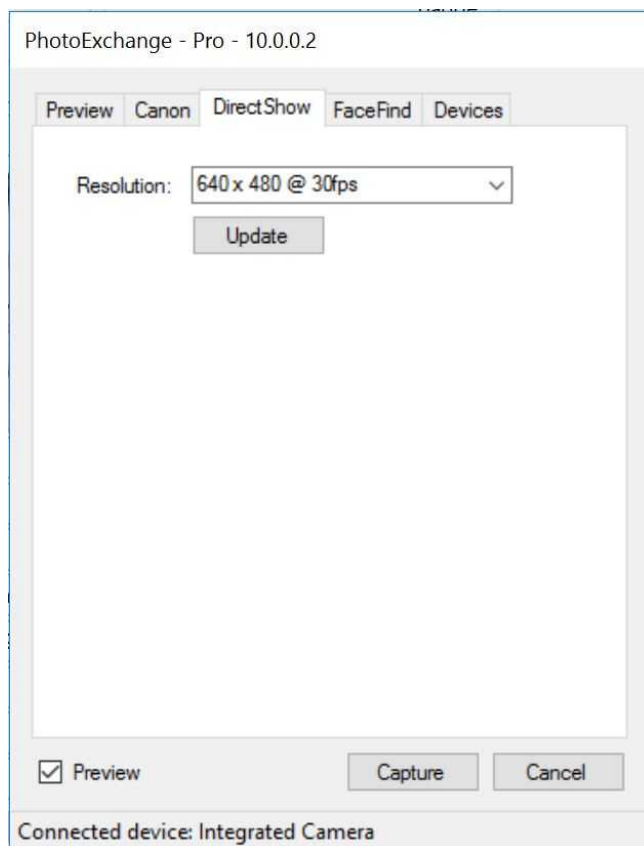
PhotoExchange is a separate utility where you can manage the connected camera, camera settings and view a preview of the image to be captured.



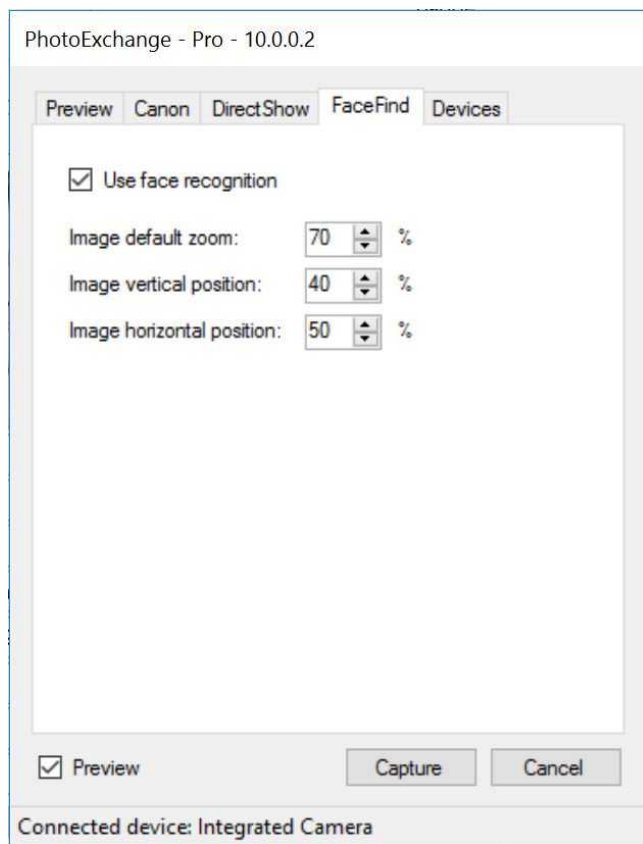
The Preview tabs shows a live preview from the selected camera.



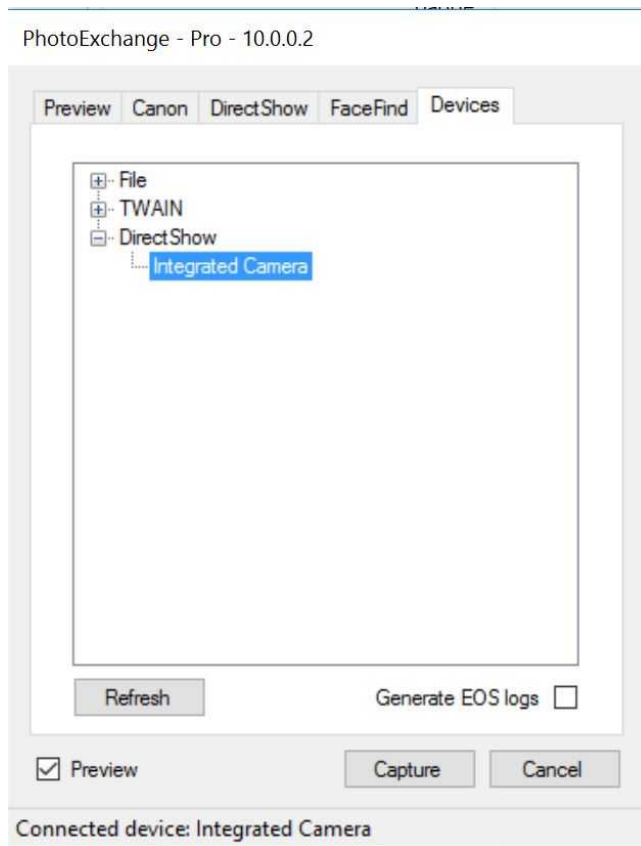
If you are using a supported Canon camera then some of, or all of the options under the Canon tab will be available depending on the camera model.



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

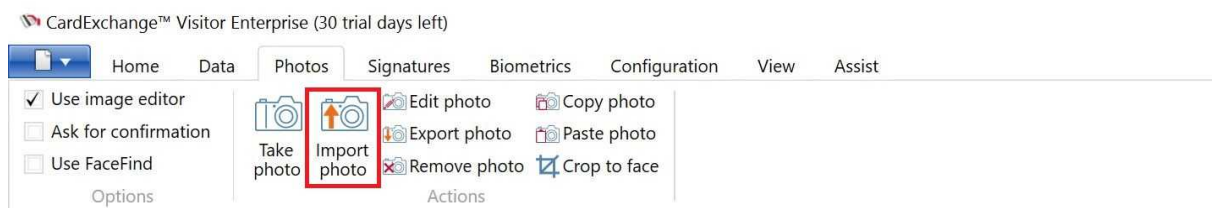


Under the FaceFind tab you can enable/disable automatic face recognition and cropping, you can also change some settings relating to zoom and position.



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

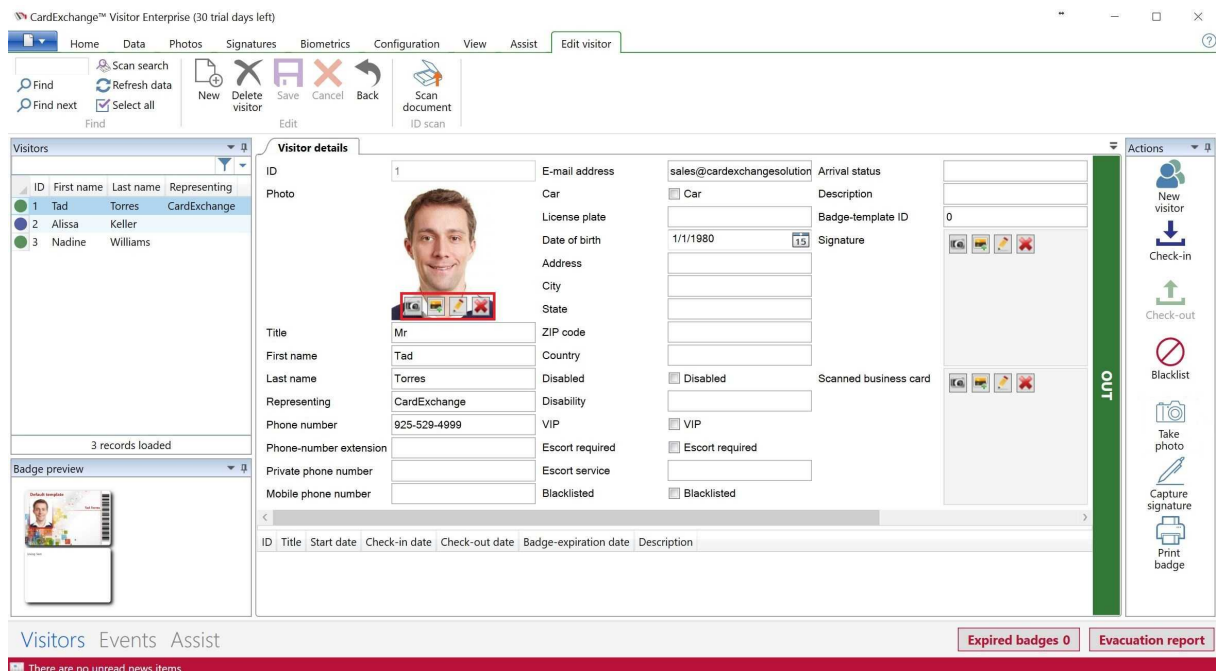
3.4.3 Import Photos



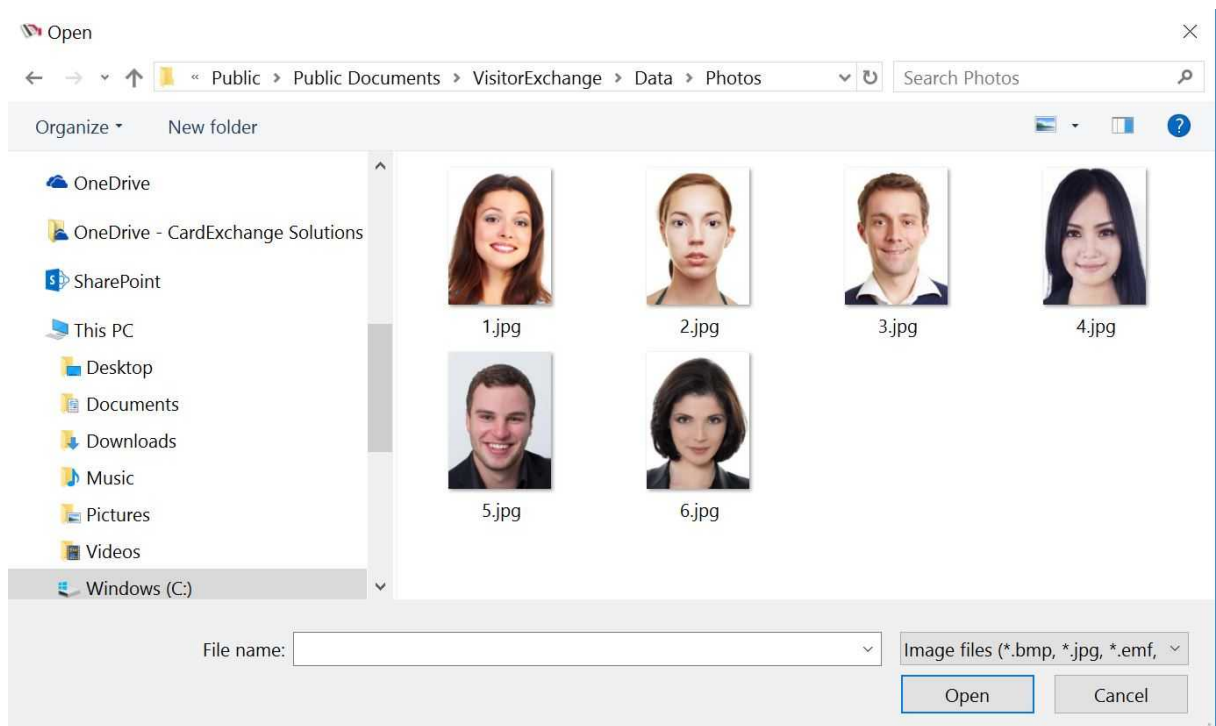
It is possible that you do not want to take a photo of someone because you already have his/her photo. If this photo is in one of the usual formats (bitmap, jpeg, png, etc.), you can use the **Import photo** function indicated to import it and store it for the selected record in CardExchange® Visitor.

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.



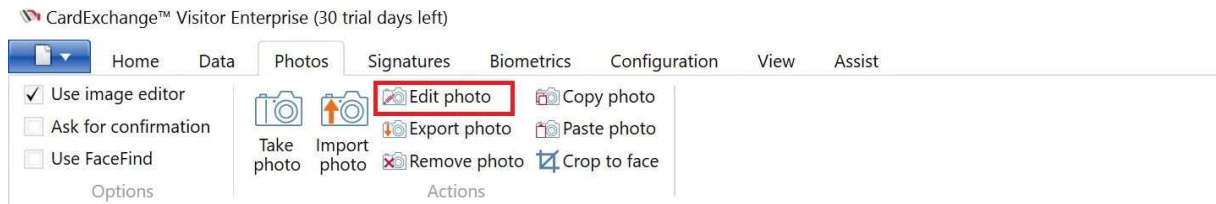
If you click **Import photo**, you enter a dialog window that allows you to select the photo file.



If you have found and selected the file, click **Open** and the photo will be displayed in the

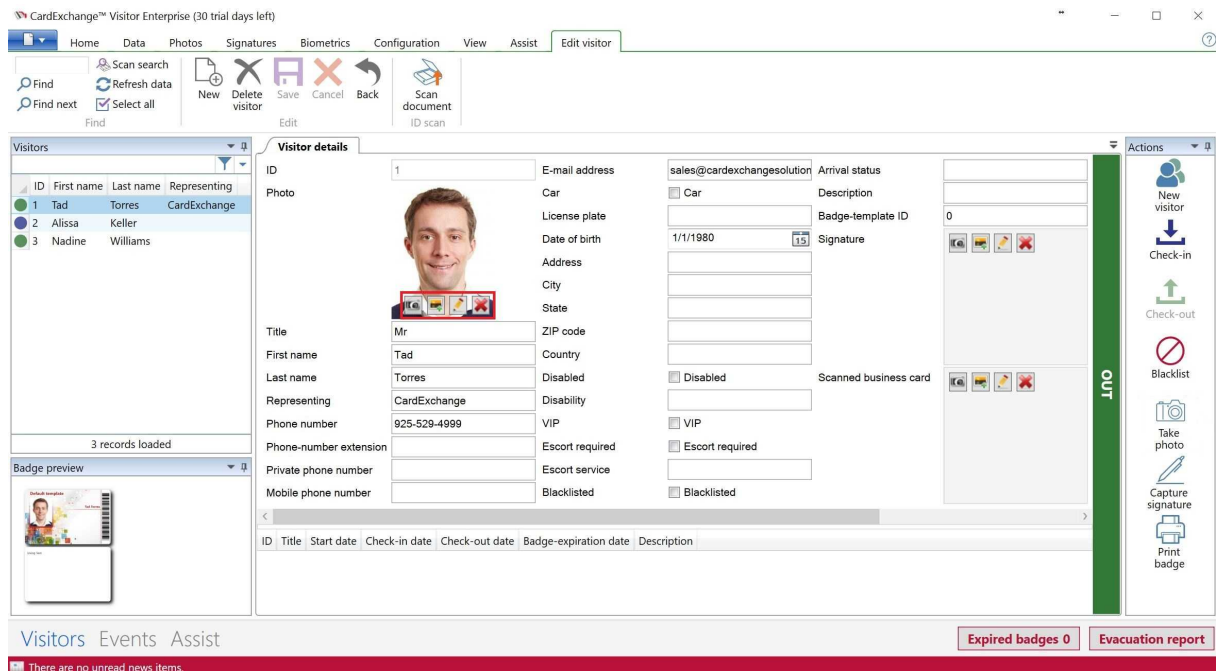
[Image Editor](#) window. Here you can crop the photo to the right size and perform any other editing operations.

3.4.4 Edit Photos

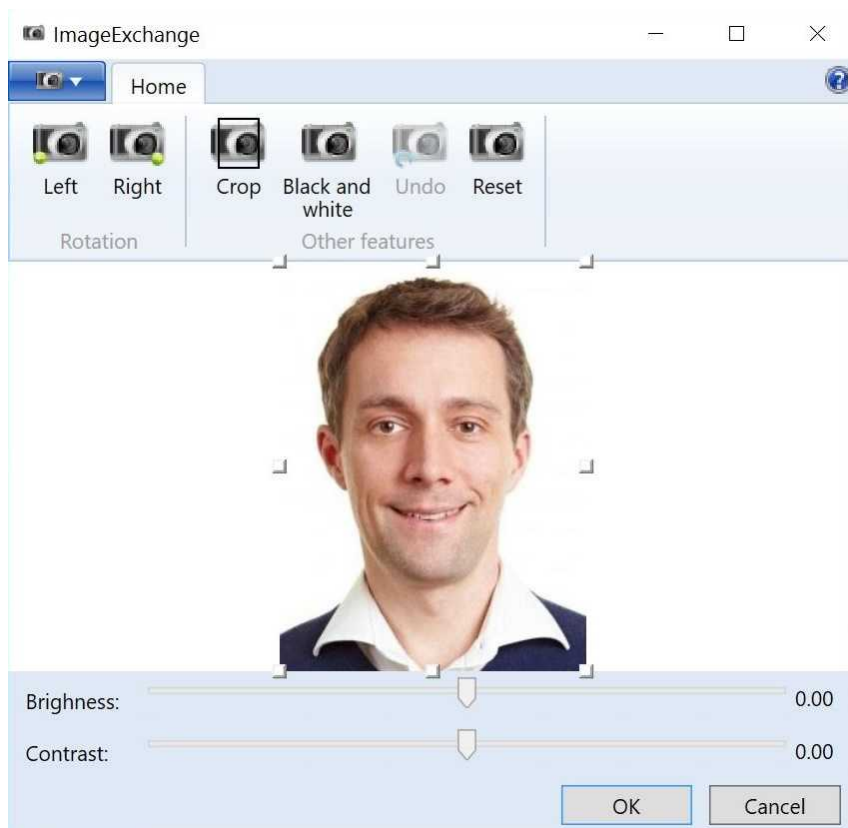


Photos that were taken earlier can be edited using Image Editor. This function is accessible in the following ways.

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



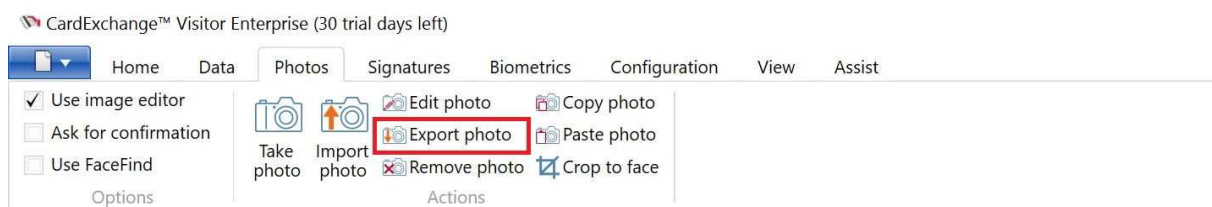
After clicking on edit image you will enter the Image Editor window of CardExchange® Visitor, ImageExchange®.



Please see the [Using Image Tools](#)⁷² section of this Help file for more information about using the ImageExchange® Image Editor.

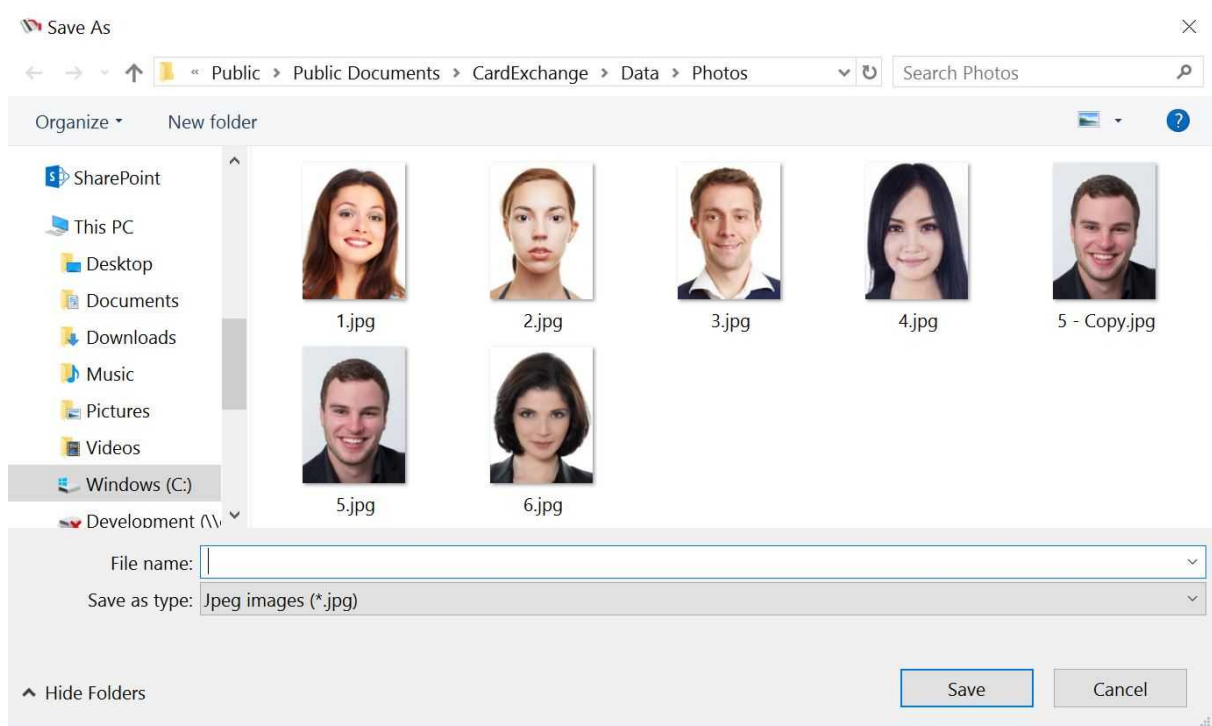
If you click on the **OK** button, the photo will be automatically cropped and the Image Editor will be closed. If a photo was already available in the database, CardExchange® Visitor asks whether you want to update it. If you click **Cancel**, the original photo will be restored on the print preview.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

3.4.5 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**

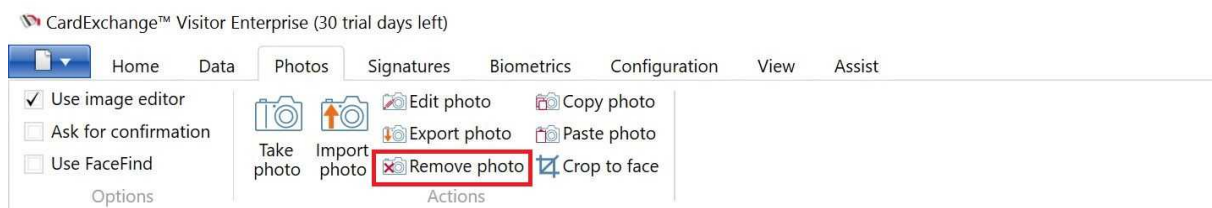
section. Once more a dialog window will be displayed in which you can specify the name and location of the file that must contain the photo.



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

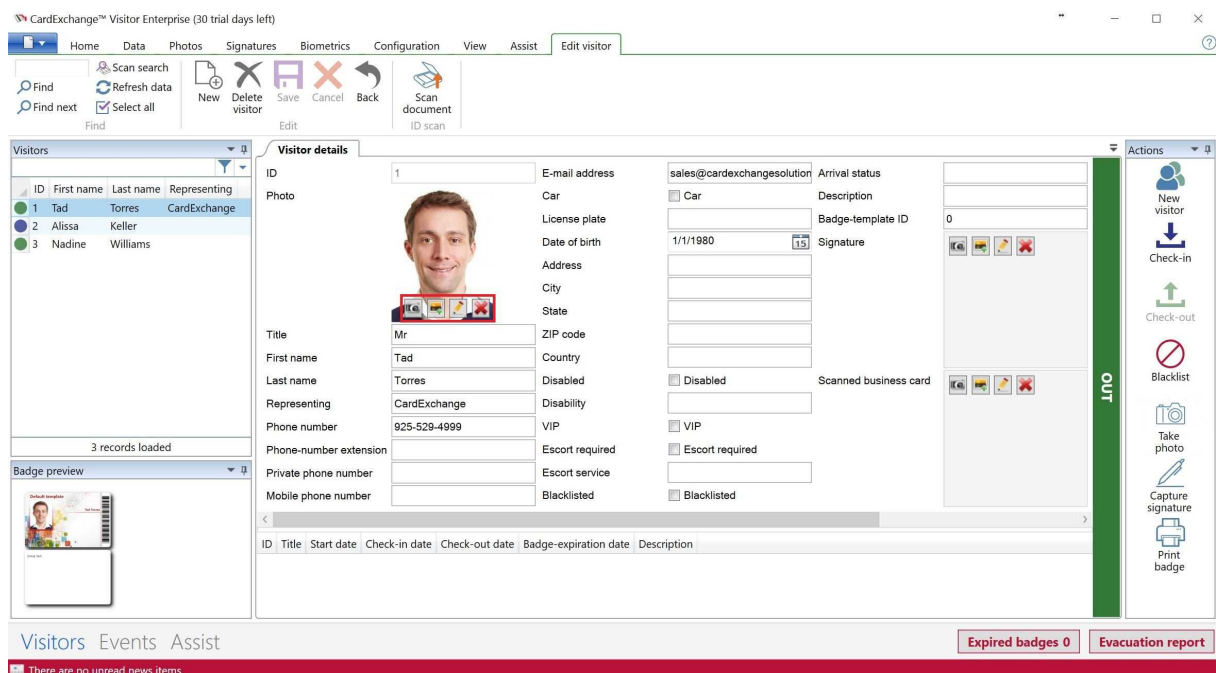
Click on **Save** and the photo is exported to the selected location.

3.4.6 Remove Photos



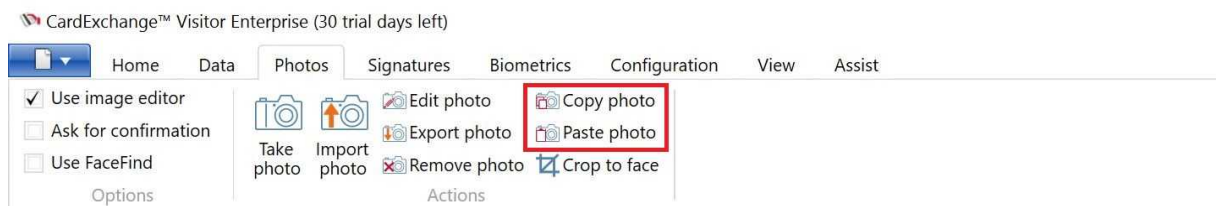
Photos can be removed from the database by clicking the **Remove photo** button from the **Actions** section indicated. The user will be asked to confirm the remove operation with the following question.

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



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

3.4.7 Copy and Paste

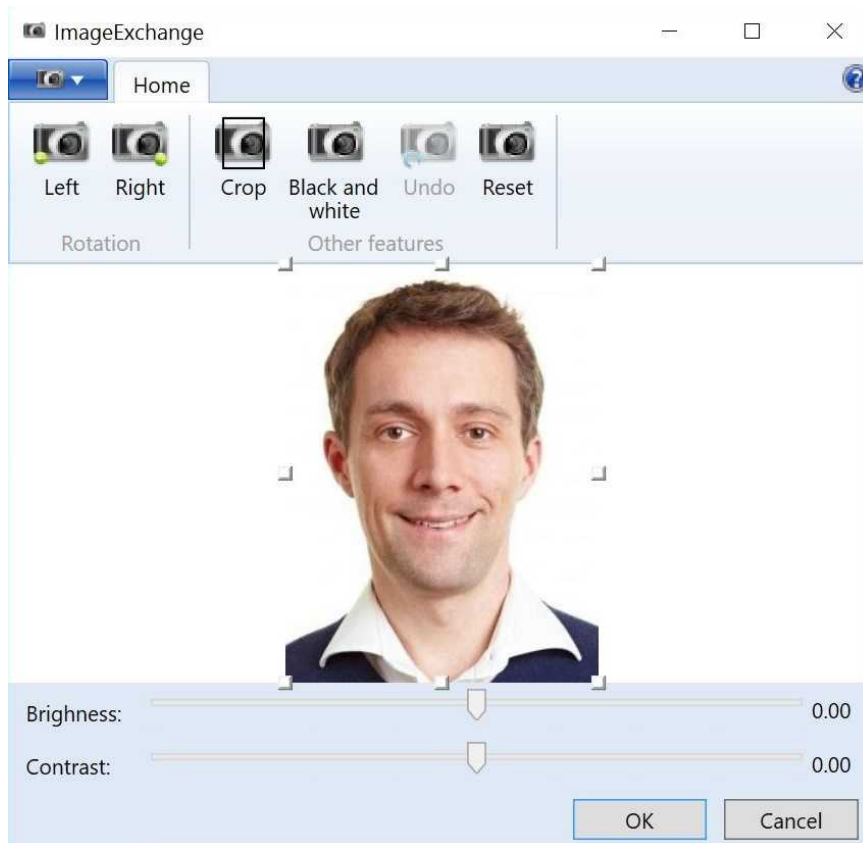


The **Actions - Copy photo** option allows you to copy the photo displayed to the photo clipboard of CardExchange® Visitor. You can then choose another record and, by using the **Paste photo** option, link the photo on the clipboard to the selected record.

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

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

3.4.8 Using Image Editor

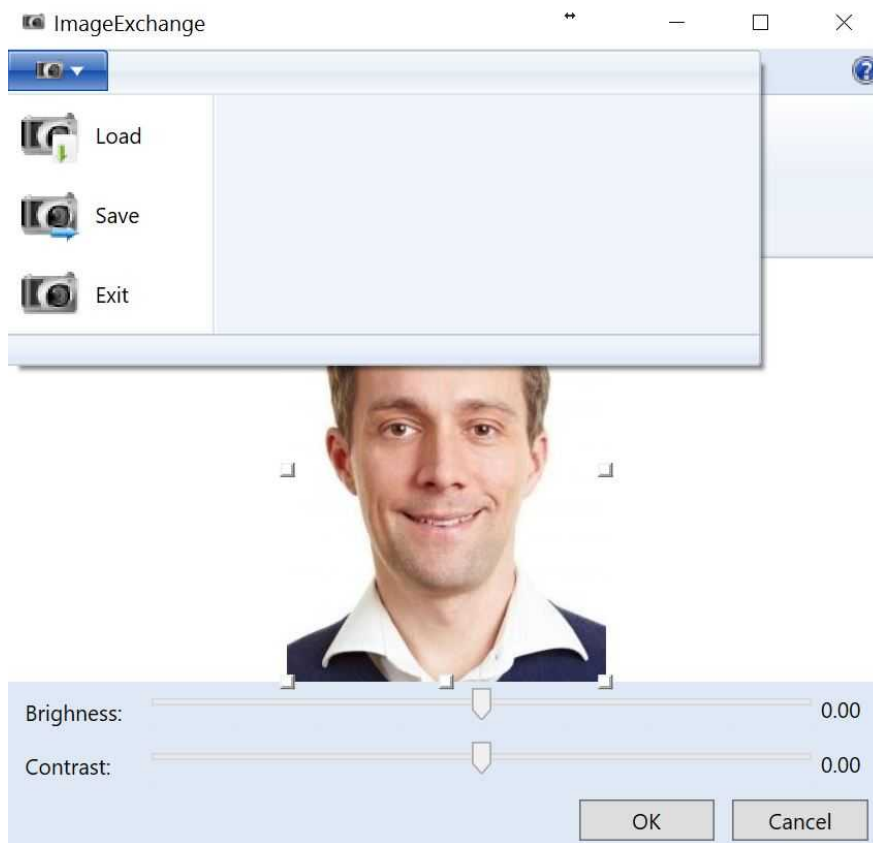


CardExchange® Visitor offers for all editions an Image Editor tool, ImageExchange®. The ImageExchange® tool offers some interesting functionality to help you upscale your photos or images.

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

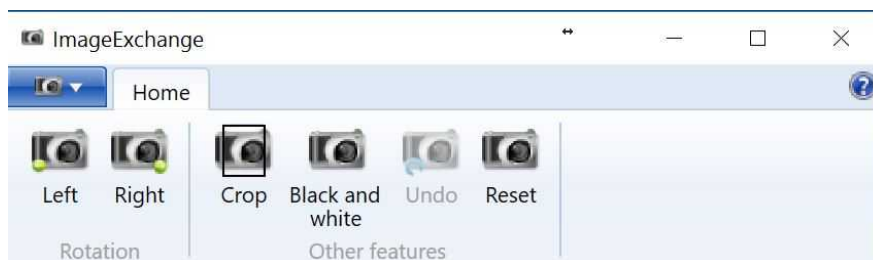


When you take a photo, capture a signature, etc., the image will be automatically be show in the ImageExchange® tool. It is also possible to Load another image via the **Load** function in the **File menu**.

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.

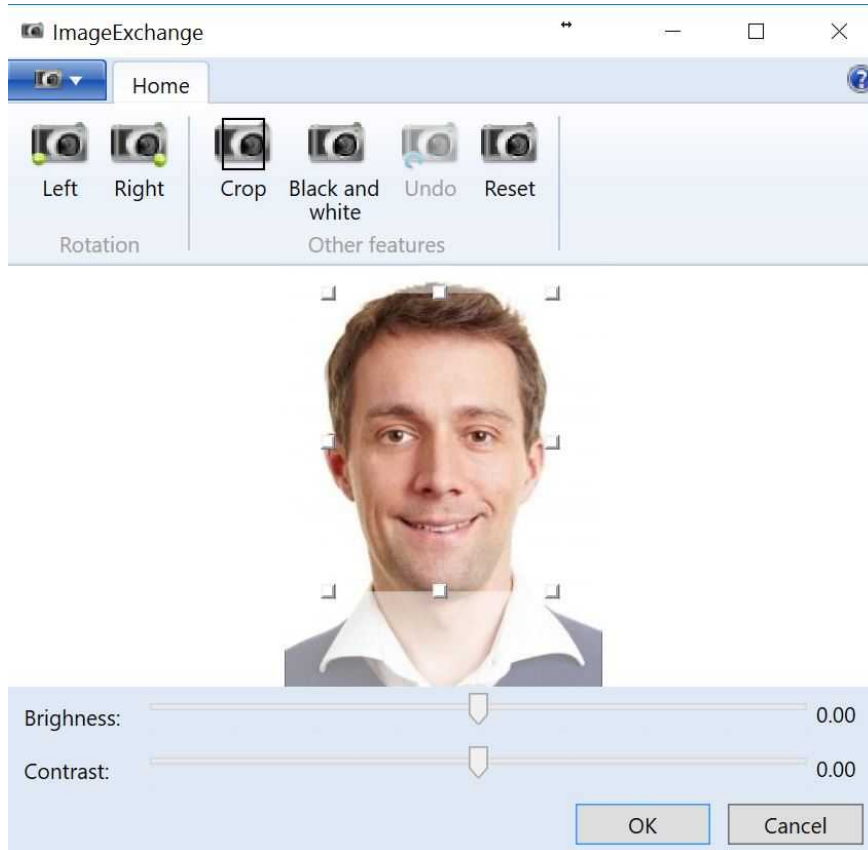
Overview of the Ribbon



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.

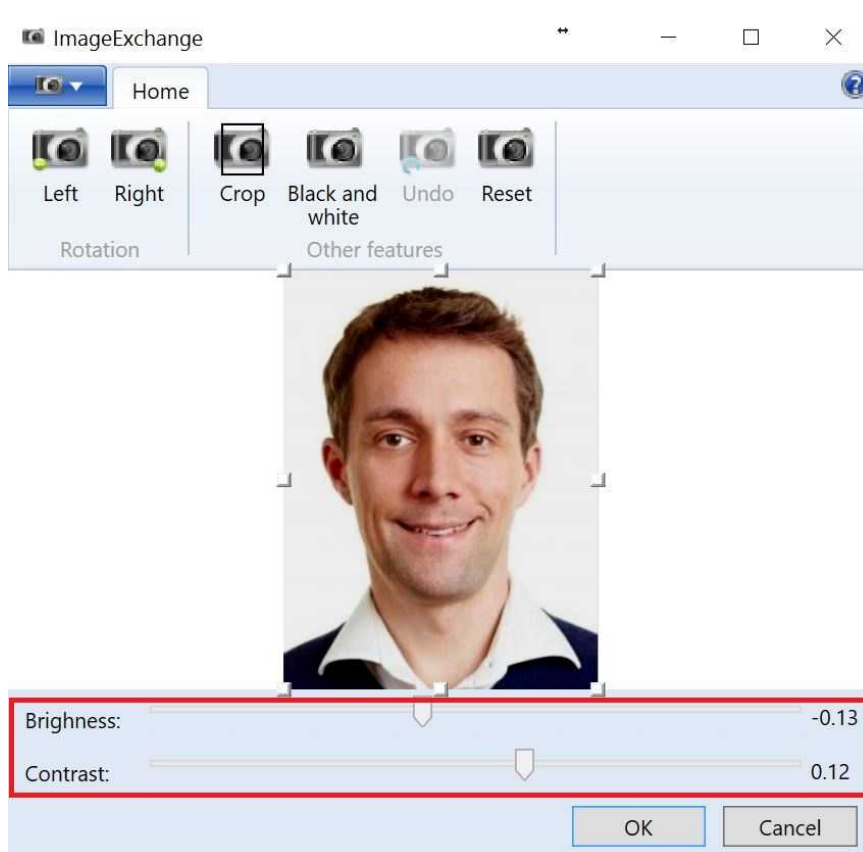
You can also crop the loaded image when you have adjusted the size.



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



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**.

3.5 Signatures



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

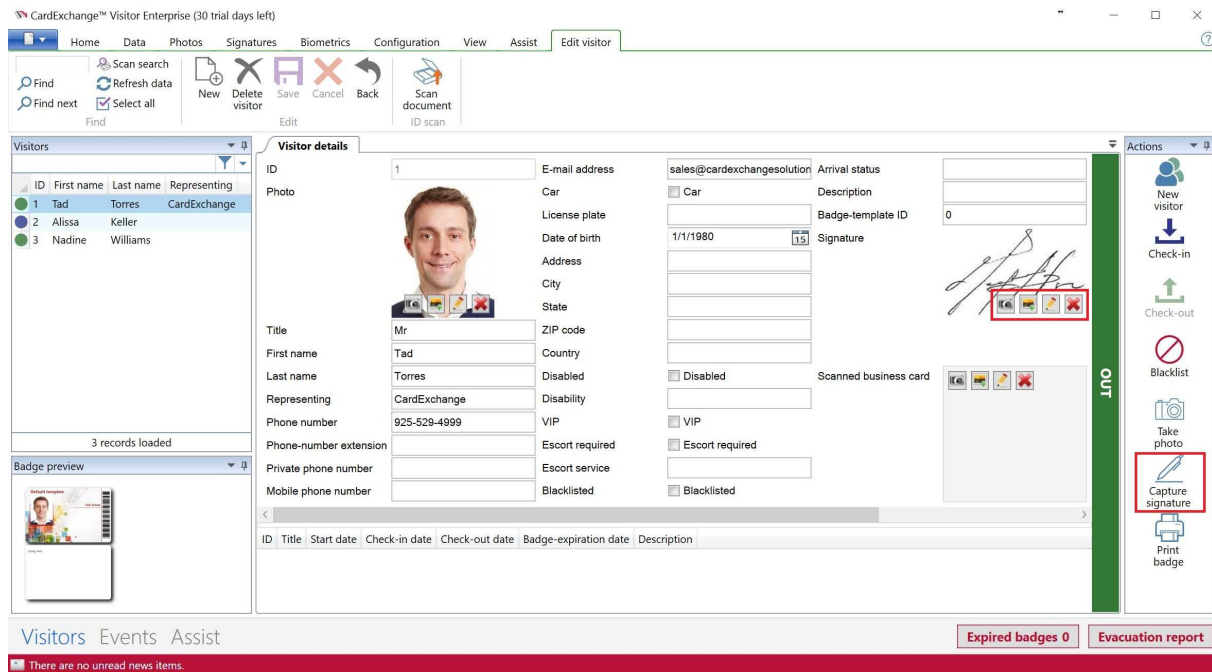
In this section of the help file you can find all the information of how to use signatures with CardExchange® Visitor.

3.5.1 Capture Signatures

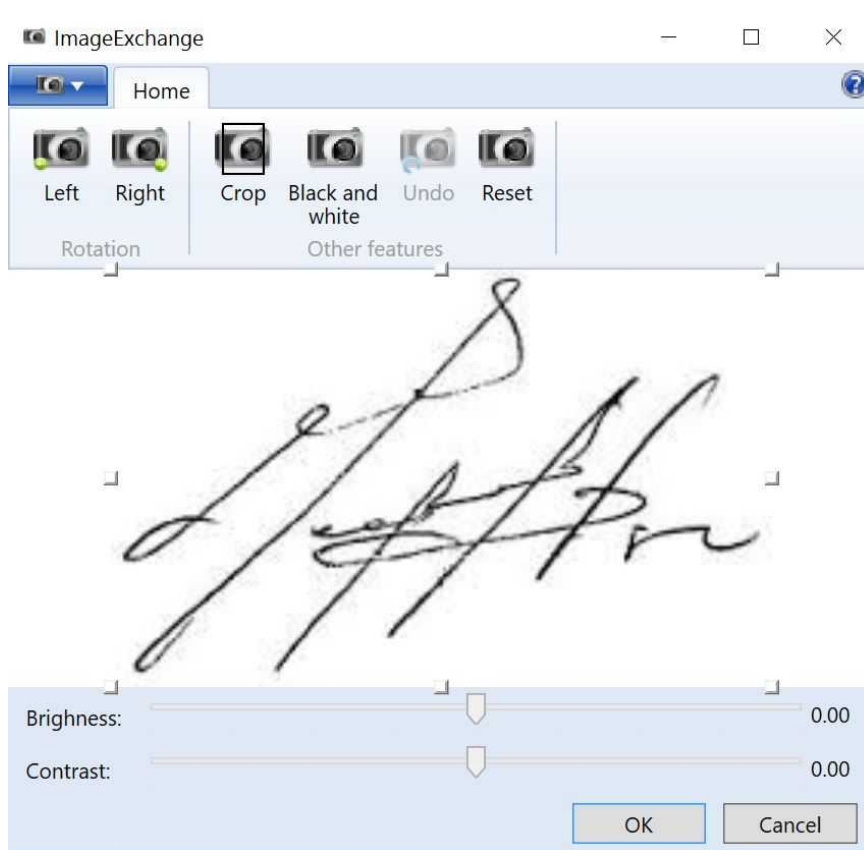


When you have selected the correct record, you can add a signature of the person to the database, or, if you want, replace the existing signature. This function is accessible in the following ways.

- 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®.



Please see the [Using Image Tools](#)^[72] section of this Help file for more information about using this ImageExchange® Image Editor.

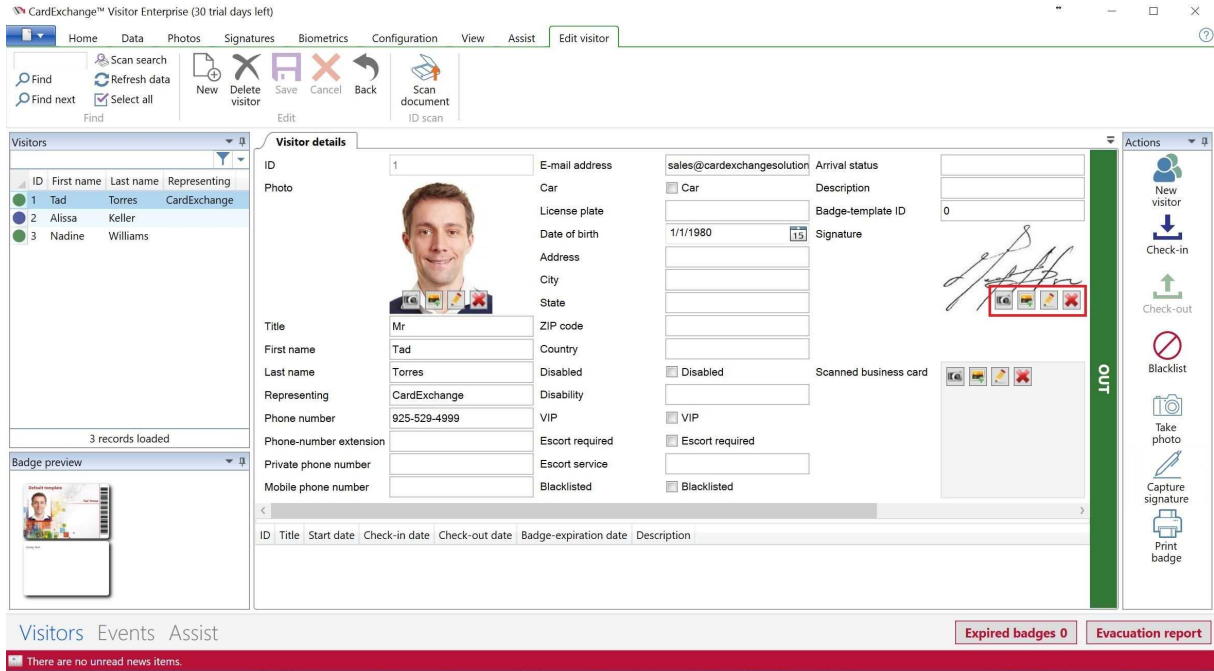
If you click on the OK button, the signature will be automatically cropped and the Image Editor will be closed. If a signature was already available in the database, CardExchange® Visitor asks whether you want to update it. If you click Cancel, the original signature will be restored on the print preview.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

3.5.2 Edit Signatures

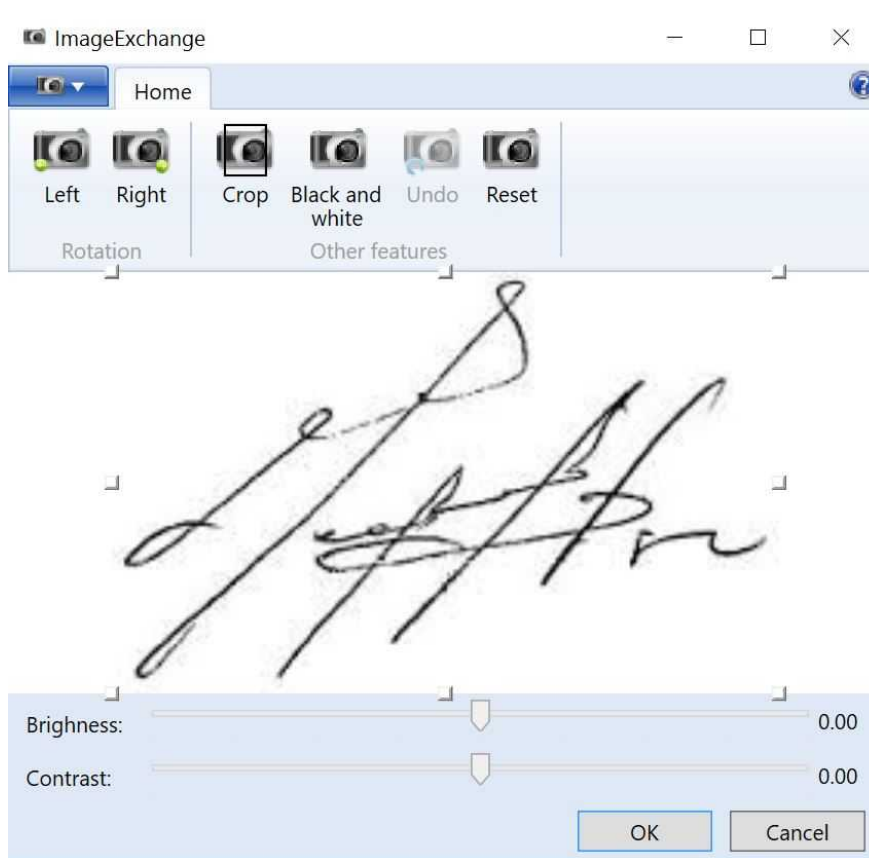


Signatures that were captured earlier can be edited using Image Editor. This function is accessible in the following ways.

- 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®.



Please see the [Using Image Tools](#)⁷² 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.

3.5.3 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

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.

3.5.4 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.

CardExchange™ Visitor Enterprise (30 trial days left)

Home Data Photos Signatures Biometrics Configuration View Assist Edit visitor

Find Find next Refresh data Select all New Delete visitor Save Cancel Back Scan document ID scan

Visitors

ID	First name	Last name	Representing
1	Tad	Torres	CardExchange
2	Alissa	Keller	
3	Nadine	Williams	

3 records loaded

Badge preview

Visitor details

ID: 1 E-mail address: sales@cardexchangesolution.com Arrival status: ☐ Car Description: ☐ Car

Photo:

License plate: Badge-template ID: 0

Date of birth: 1/1/1980 Signature:

Address: City: State:

Title: Mr ZIP code:

First name: Tad Country:

Last name: Torres Disabled: ☐ Disabled

Representing: CardExchange Disability: ☐ VIP

Phone number: 925-529-4999 VIP: ☐ VIP

Phone-number extension: Escort required: ☐ Escort required

Private phone number: Escort service:

Mobile phone number: Blacklisted: ☐ Blacklisted

Scanned business card:

Actions

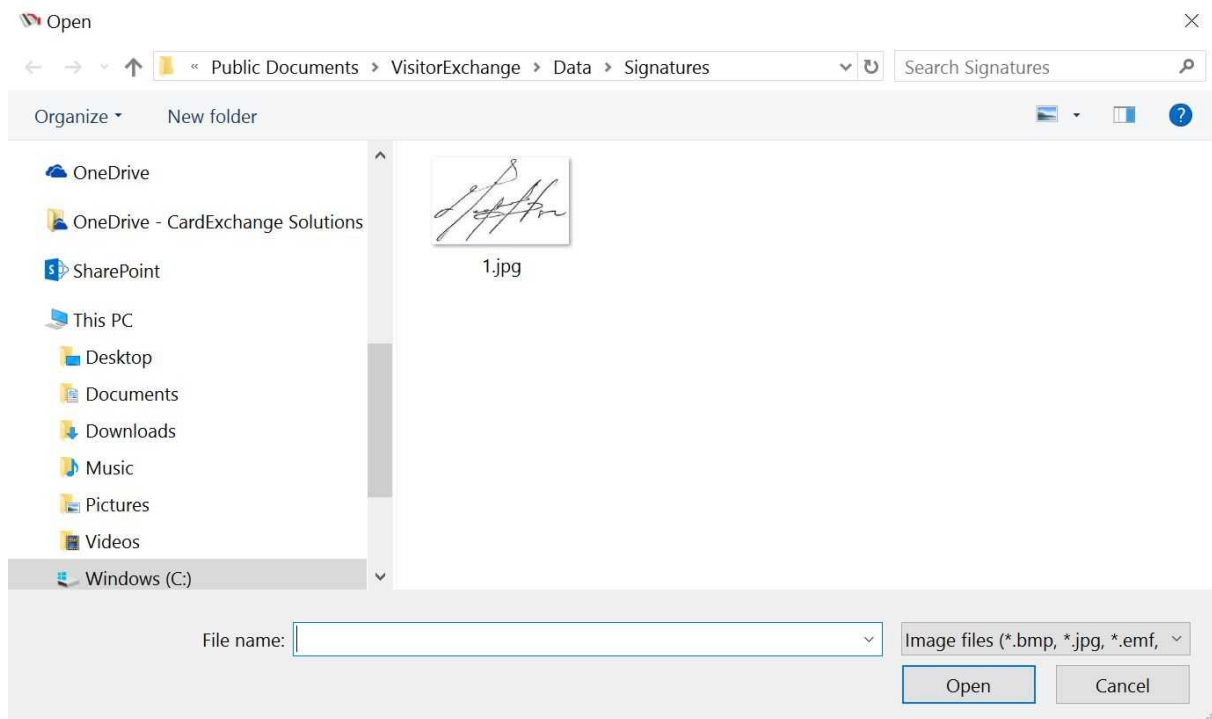
- New visitor
- Check-in
- Check-out
- Blacklist
- Take photo
- Capture signature
- Print badge

Visitors Events Assist

Expired badges 0 Evacuation report

There are no unread news items.

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



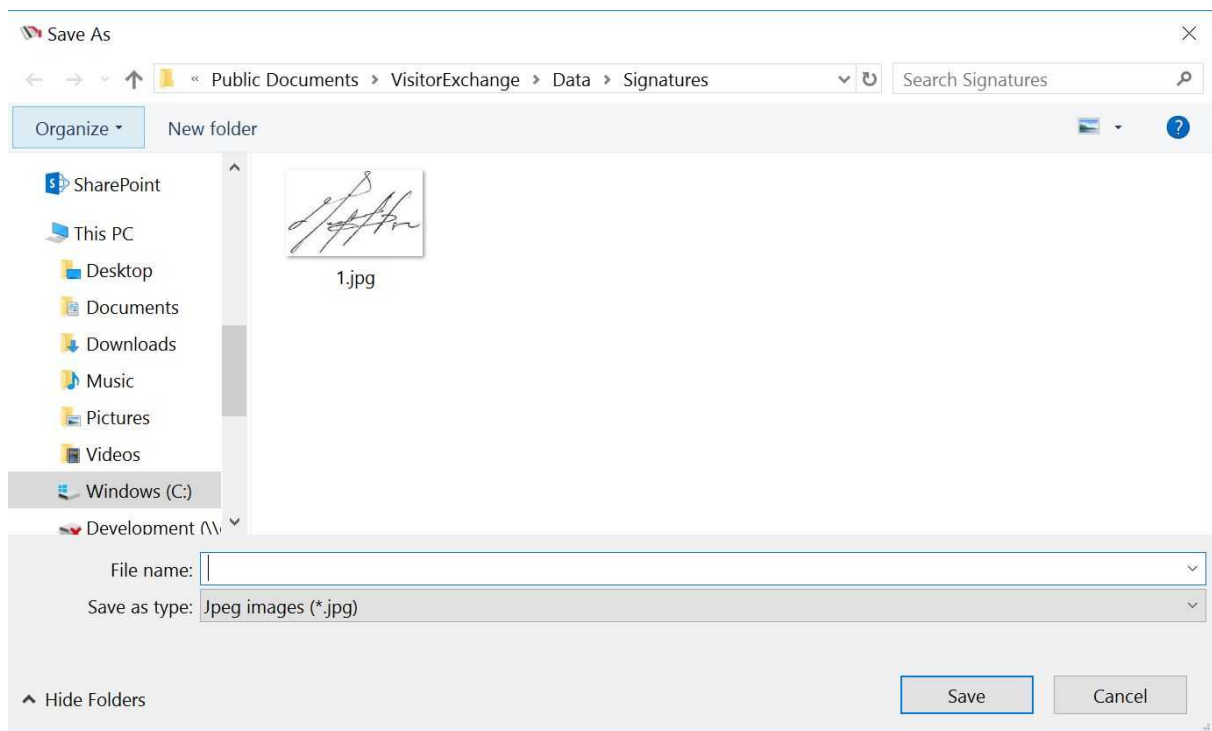
If you have found and selected the file, click **Open** and the signature will be displayed in the [Image Editor](#) ⁷² window. Here you can crop the signature to the right size and perform

any other editing operations.

3.5.5 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**.

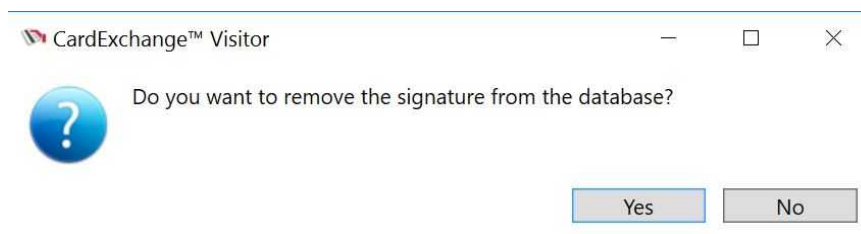
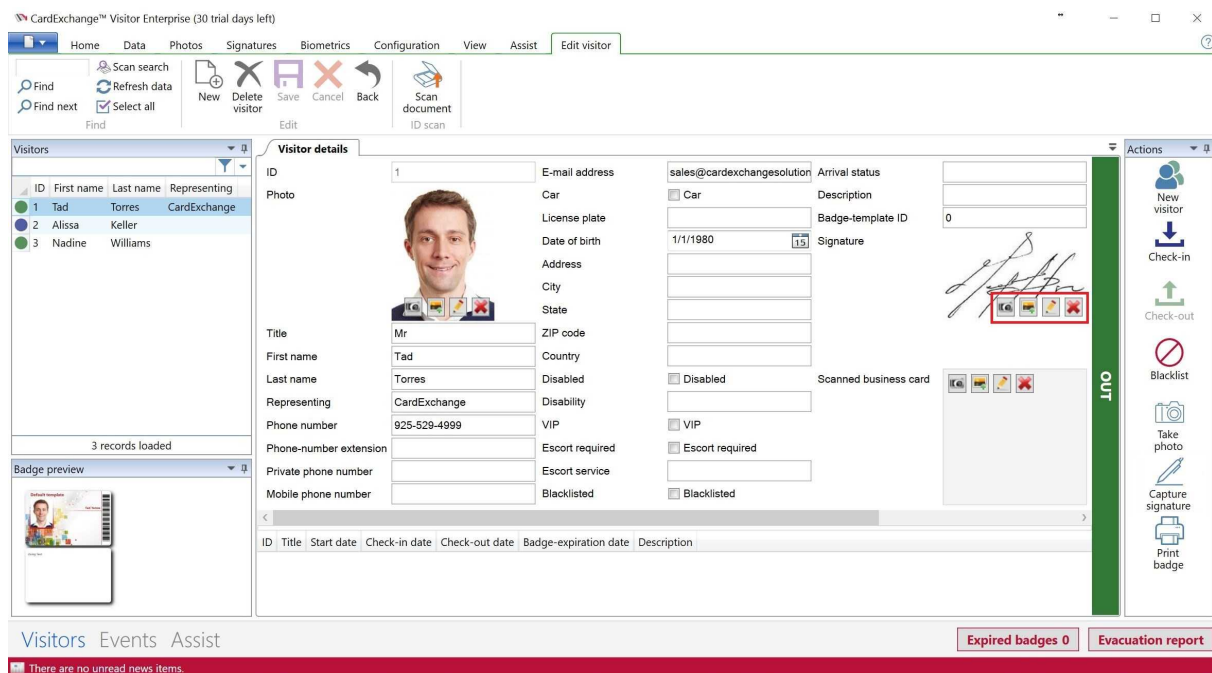
Click on **Save** and the signature is exported to the selected location.

3.5.6 Remove Signatures



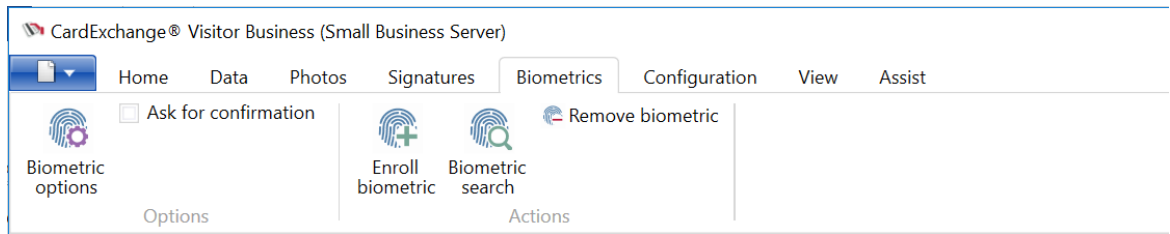
Signatures can be removed from the database by clicking the **Remove signature** button from the **Actions** section indicated. The user will be asked to confirm the remove operation with the following question.

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.

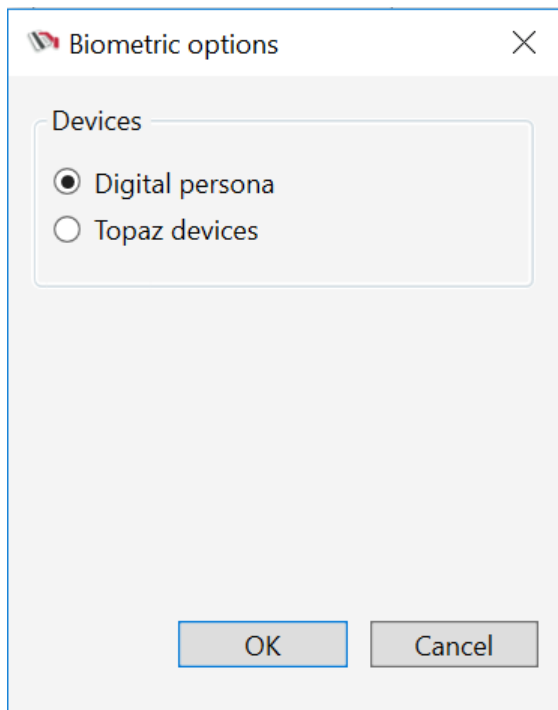
3.6 Biometrics



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

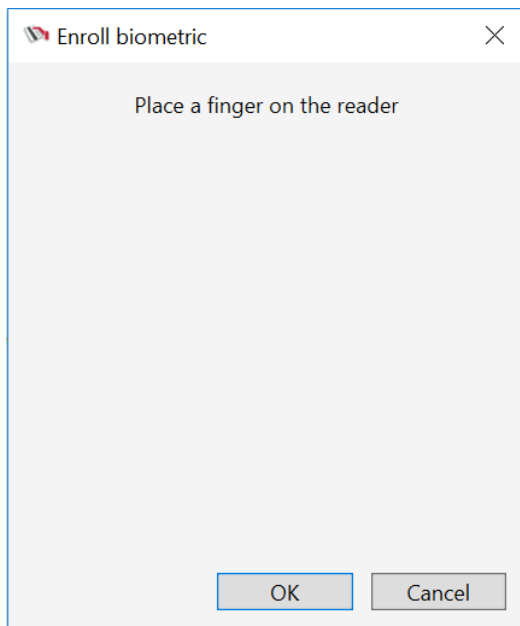
In this section of the help file you can find all the information of how to use Biometrics with CardExchange® Visitor.

3.6.1 Biometric options



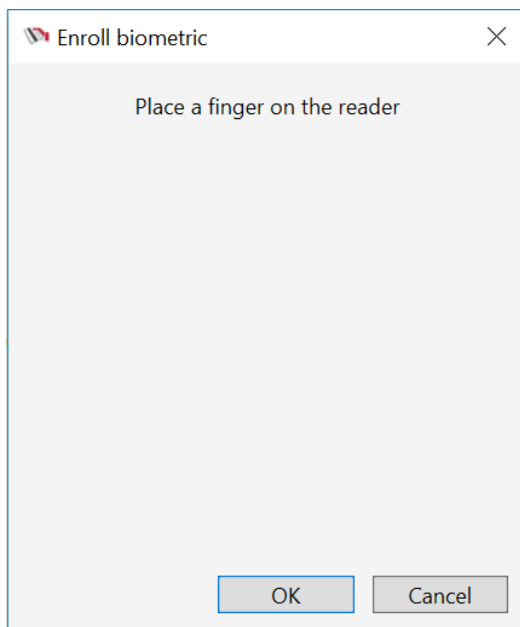
In the Biometric options you can choose either Digital Persona or Topaz devices depending on the hardware you have.

3.6.2 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.

3.6.3 Biometric Search

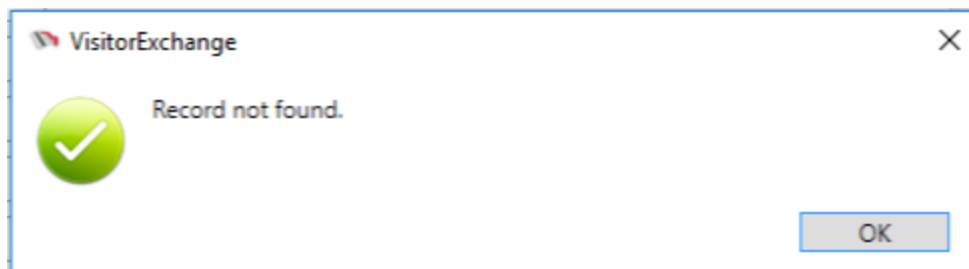


When clicking on Biometric search you will be prompted to place finger on the reader, after a successful read it will attempt to look up the matching record from the database. If

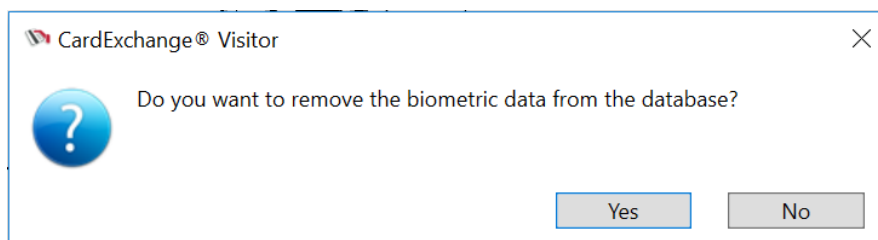
sound the record will be displayed.

The screenshot displays the CardExchange® Visitor Business application window. The interface includes a menu bar (Home, Data, Photos, Signatures, Biometrics, Configuration, View, Assist) and a toolbar with options like 'Ask for confirmation', 'Enroll biometric', and 'Remove biometric'. The main area is divided into sections for 'Visitors' (a list with columns ID, First name, Last name), 'Visitor details' (a form for a specific visitor), and 'Actions' (a vertical bar with icons for New visitor, Check-in, Check-out, Blacklist, Take photo, Capture signature, Print badge, and Visitor info). The 'Visitor details' section shows a photo of a woman, a signature, and various fields for personal and contact information. A table at the bottom shows a list of records with columns for ID, Title, Start date, Check-in date, Check-out date, Badge-expiration date, Description, and Barcode value. The status bar at the bottom indicates 'Expired badges 0' and 'Evacuation report'.

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.

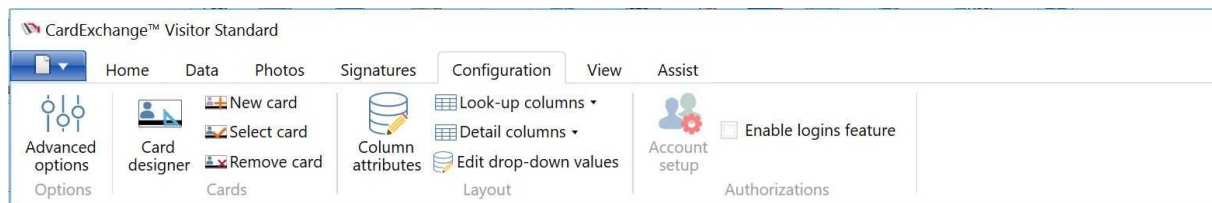


3.6.4 Remove Biometric



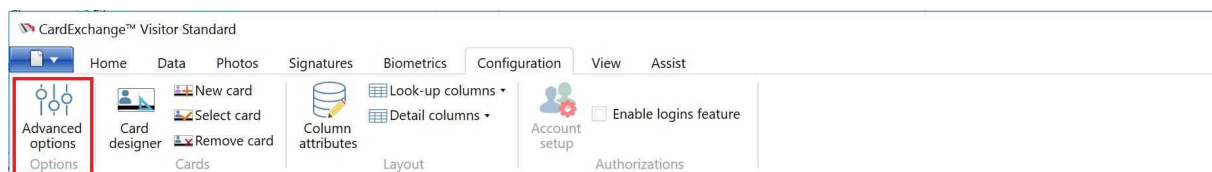
If required, you can also remove the stored biometric template from the database.

3.7 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.

3.7.1 Advanced Options



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

Advanced options

General

Lobbies

Documents

Screening

E-mail

Kiosk - General

Kiosk - Assistants

☒ Enable automatic checkouts

☐ Show service-center errors

☐ Show a visitor's additional needs at check-in

Print behavior: Show print preview

Confirm incidental check-ins for: All visitors

Deny incidental check-ins to: All visitors

Require badge-expiration dates for: Preregistered visitors

Detail-editor width (pixels): 200

Invitee history (days): 7

Default event-start-date interval (minutes): 0

Default event-end-date interval (minutes): 60

Default early-checkin-date interval (minutes): 30

Default badge-expiration-date interval (minutes): 30

Default event organizer: Art Venere Organizer

Update-timer interval (seconds): 300

OK Cancel

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.

3.7.1.1 General

Advanced options

General

- ☒ Enable automatic checkouts
- ☐ Show service-center errors
- ☐ Show a visitor's additional needs at check-in
- Print behavior: Show print preview
- Confirm incidental check-ins for: All visitors
- Deny incidental check-ins to: All visitors
- Require badge-expiration dates for: Preregistered visitors
- Detail-editor width (pixels): 200
- Invitee history (days): 7
- Default event-start-date interval (minutes): 0
- Default event-end-date interval (minutes): 60
- Default early-checkin-date interval (minutes): 30
- Default badge-expiration-date interval (minutes): 30
- Default event organizer: Art Venere Organizer
- Update-timer interval (seconds): 300

OK Cancel

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.

Show service-center errors
Show a visitor's additional needs at check in

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. 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.

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.

Confirm incidental check-ins for
Deny incidental

Here you can select if you want to have a confirmation before check-in, or not, and if so, for who.

Here you can select what type of visitor is denied to check-in, when you

- check-ins to** 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.
- 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.
- Invitee history (days)** Enter the amount of days you want to the history of a visitor. By default 7 days is shown.
- Default event-start-date interval (minutes)** Determines how many minutes after the current time should the event start. By default this is 0.
- 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.
- 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.

3.7.1.2 Lobbies

The screenshot shows a software window titled "Advanced options" with a sidebar on the left containing the following menu items: General, Lobbies (selected), Documents, Screening, E-mail, Kiosk - General, and Kiosk - Assistants. The main area of the window is divided into three sections:

- Location options:** Contains two text input fields. The first, labeled "My building", contains the text "201 Sand Creek Road" and has a "Building" button to its right. The second, labeled "My lobby", contains the text "Suite G" and has a "Lobby" button to its right.
- Filter options:** Contains three radio button options:
 - ☒ Do not apply any filter on buildings or lobbies at start-up
 - ☐ Filter on my building at start-up
 - ☐ Filter on my lobby at start-up
- Check-in options:** Contains three radio button options:
 - ☒ Allow check-ins for any building and lobby
 - ☐ Only allow check-ins for my building
 - ☐ Only allow check-ins for my lobby

At the bottom right of the window are "OK" and "Cancel" buttons.

Location options:

My building

Here you can select the name of the building that the

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

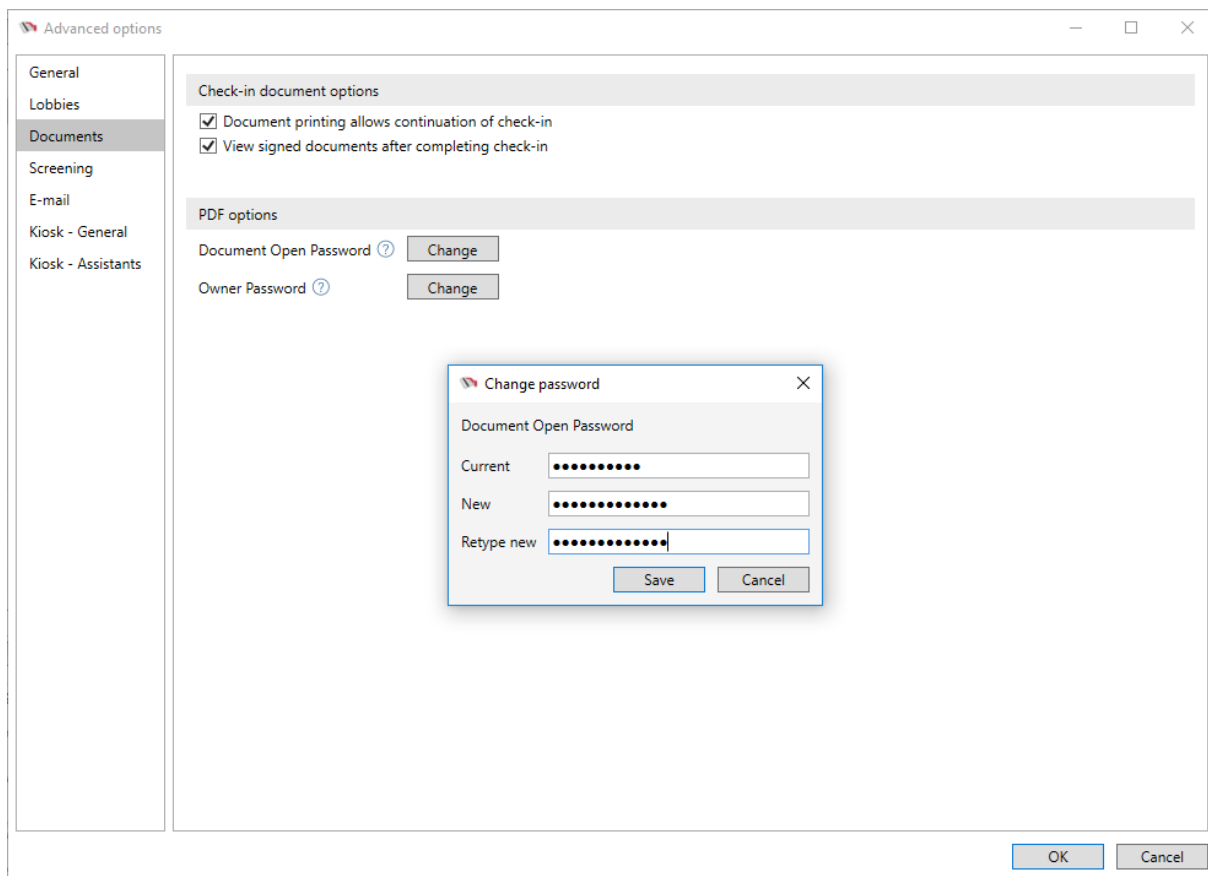
Filter options:

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:

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

3.7.1.3 Documents



Check-in document options

Document printing allows continuation of check-in
View signed documents after completing check-in

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

PDF options

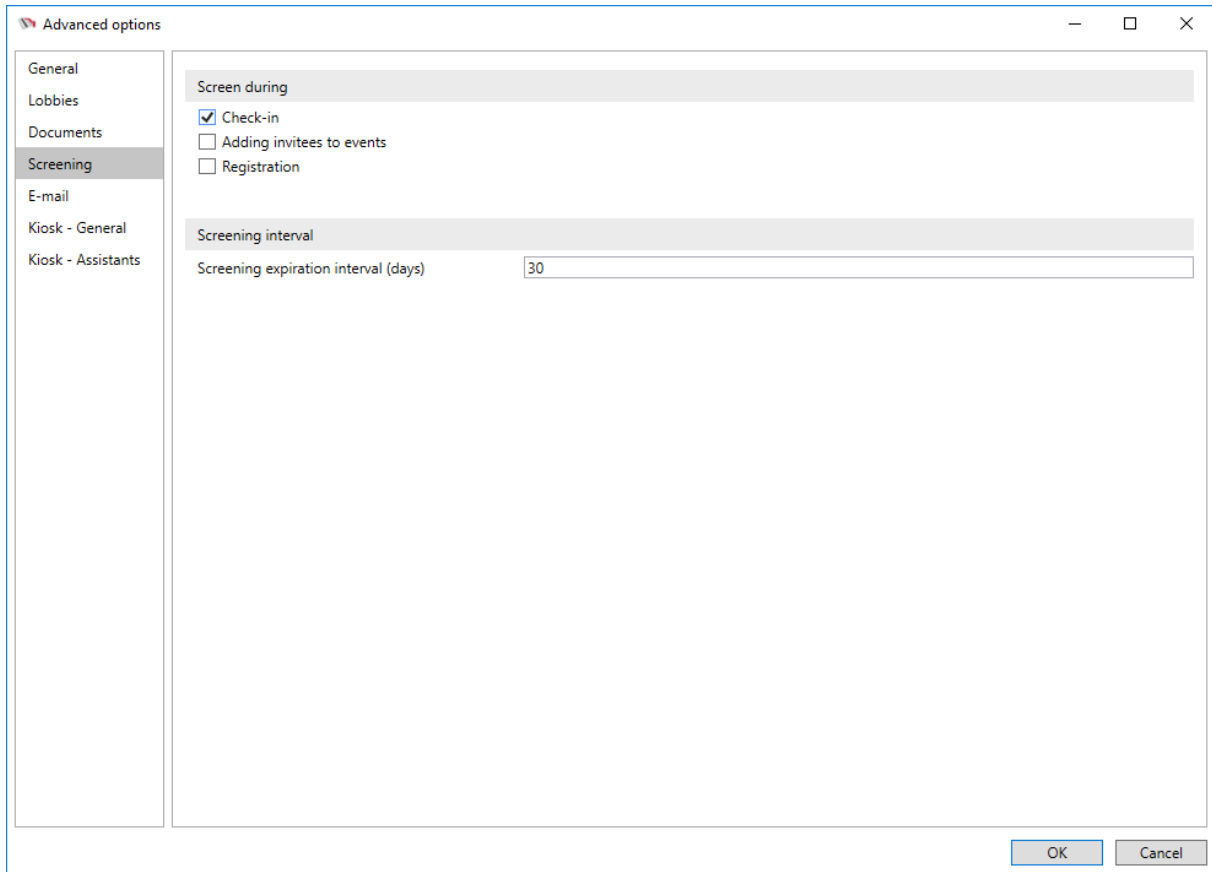
Each document is saved as an encrypted PDF. When attempting to open one of these documents, a prompt is shown asking for a password to be entered. Two types of passwords can be entered: Document Open Password or Owner Password. Depending on which is entered, different permissions are granted.

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.

3.7.1.4 Screening



The screenshot shows a software window titled "Advanced options" with a sidebar on the left containing the following menu items: General, Lobbies, Documents, Screening (highlighted), E-mail, Kiosk - General, and Kiosk - Assistants. The main content area is divided into two sections. The "Screen during" section has three checkboxes: "Check-in" (checked), "Adding invitees to events" (unchecked), and "Registration" (unchecked). The "Screening interval" section contains a text input field labeled "Screening expiration interval (days)" with the value "30" entered. At the bottom right of the window are "OK" and "Cancel" buttons.

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.

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.

3.7.1.5 Email

Advanced options

General
Lobbies
Documents
Screening
E-mail
Kiosk - General
Kiosk - Assistants

Notification options

☒ Enable e-mail notifications

Email connection options

From e-mail address: sales@cardexchangesolutions.com

SMTP server name: cardexchange.solutions

SMTP user name: no-reply@cardexchange.solutions

SMTP password:

SMTP Port: 25 ☒ Enable SSL/TLS

Email message options

E-mail subject: CardExchange™ Visitor Email Notification.

E-mail message:

☒ Guest message:
☐ Host message:

```
<html>
<body>
<h1>Check-In Confirmation</h1>
<br>
<p>Dear {0},</p>
<p>Your meeting has been booked and confirmed. Please use the barcode below to check-in at our
kiosk or reception desk on arrival.</p>

<br>
<p><mark>If you have any questions about this confirmation, please contact your host. We look
forward to welcoming you to CardExchange Solutions soon.</mark></p>
</body>
</html>
```

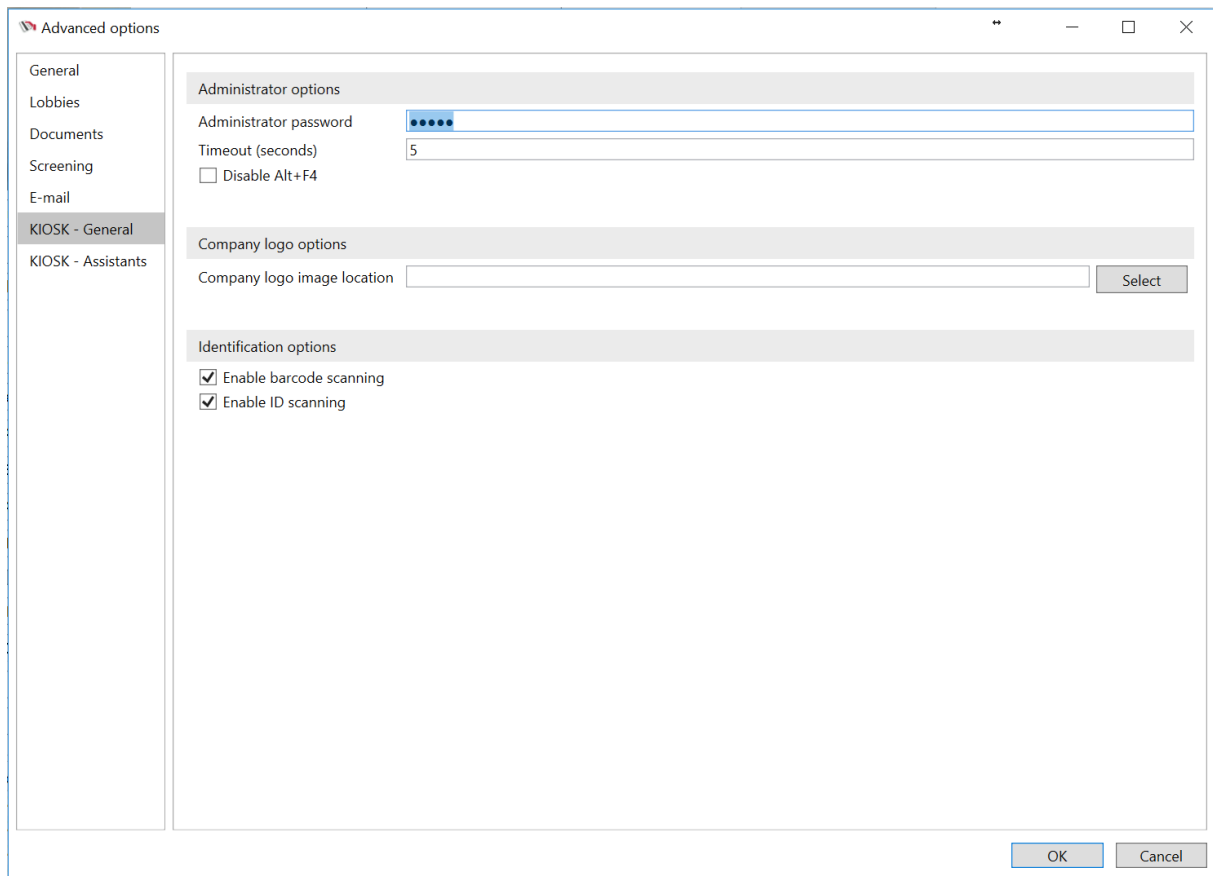
Test

OK Cancel

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.

In this section you can enable email notifications and specify the SMTP server settings along with the messages that are sent.

3.7.1.6 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.

3.7.1.6.1 KIOSK - Check-in Assistants

Advanced options

General
Lobbies
Documents
Screening
E-mail
Kiosk - General
Kiosk - Assistants

Assistants

Check-in
Check-out

Assistant steps

Event details
Visitor details
Documents
Summary

Visibility options

☒ Is visible to the user

Multimedia options

☐ Video acceptance is required
☐ Enable video
Video location
Video message

Data editors

Badge expiration date
☒ Accepts user input ☒ Is visible to the user

Earliest check-in allowed
☒ Accepts user input ☒ Is visible to the user

End
☒ Accepts user input ☒ Is visible to the user

First name
☒ Accepts user input ☒ Is visible to the user

Last name
☒ Accepts user input ☒ Is visible to the user

Start
☒ Accepts user input ☒ Is visible to the user

Event description
☒ Accepts user input ☒ Is visible to the user

Event title
☒ Accepts user input ☒ Is visible to the user

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.

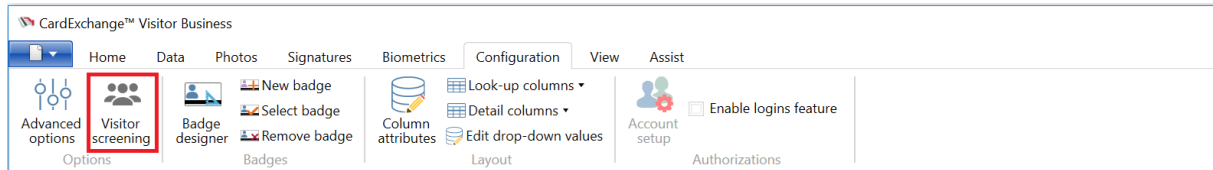
You can specify the location for the video along with a message that is displayed.

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

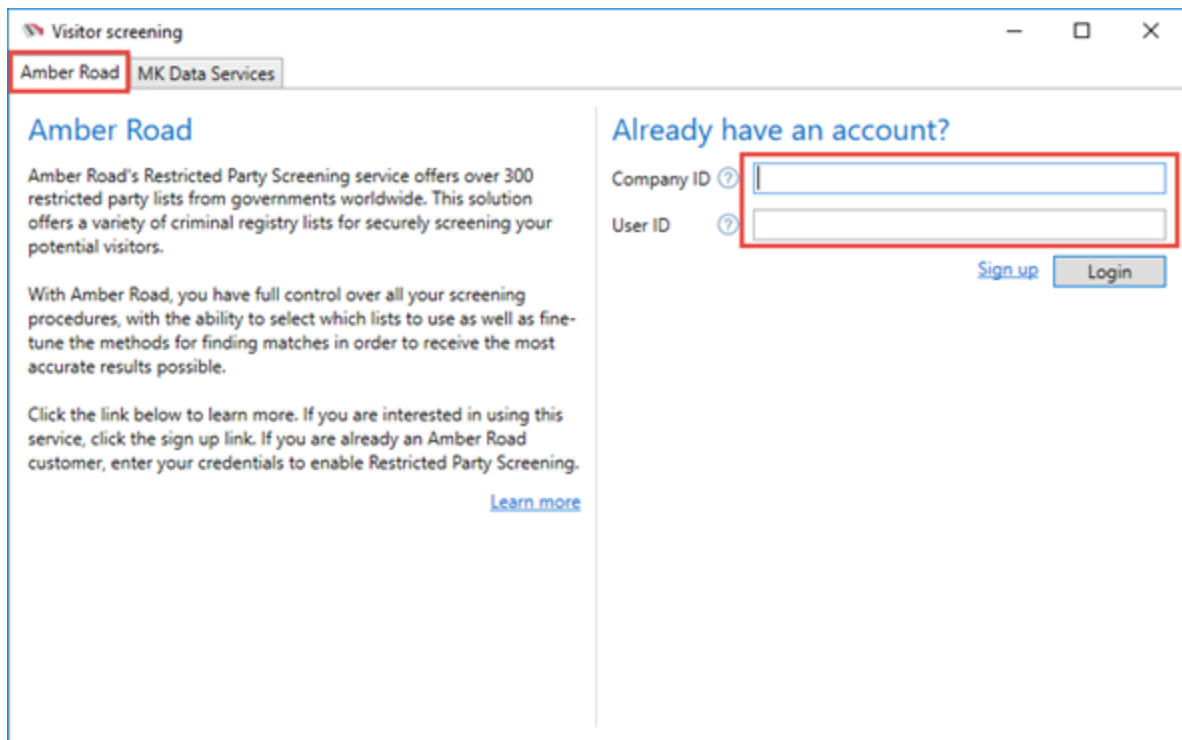
You can also specify the same options for the check-out summary step.

3.7.2 Visitor Screening

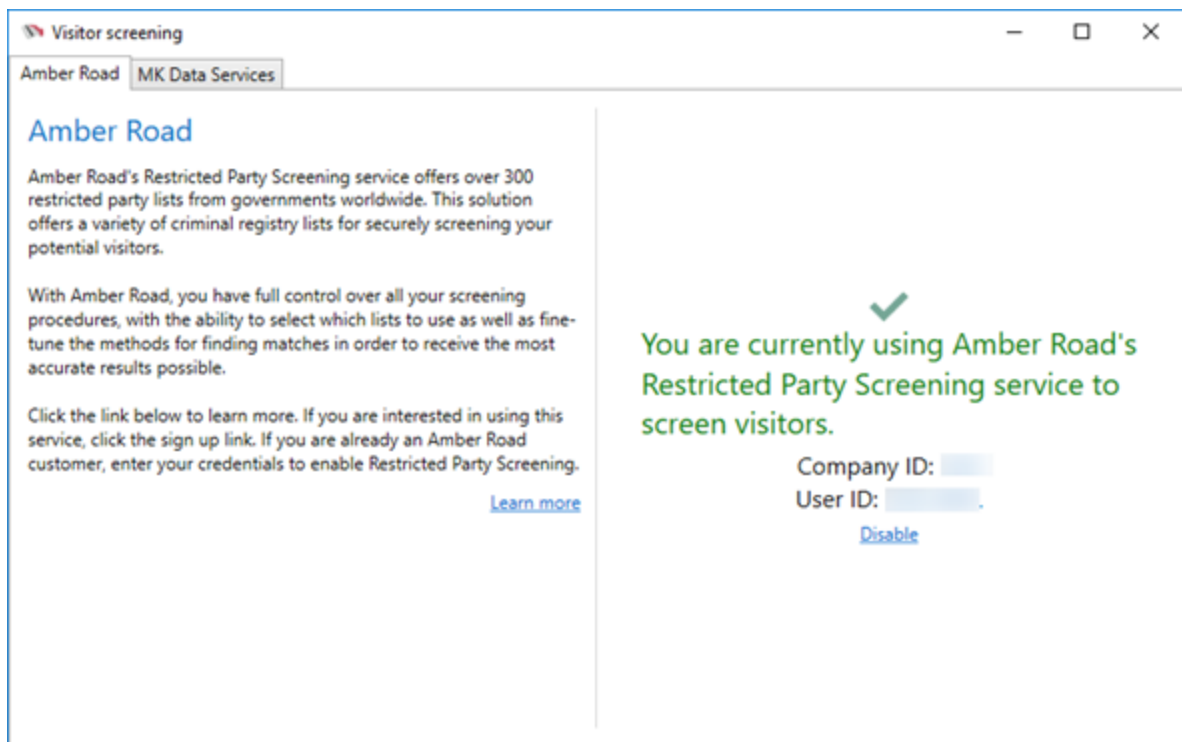
CardExchange® Visitor Business Edition is offering visitor screening via criminal and sex offender database systems of Amber Road and MK Data Services. CardExchange Solutions does not provide subscriptions for these screening services. To use these services, a separate subscription will have to be purchased 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:

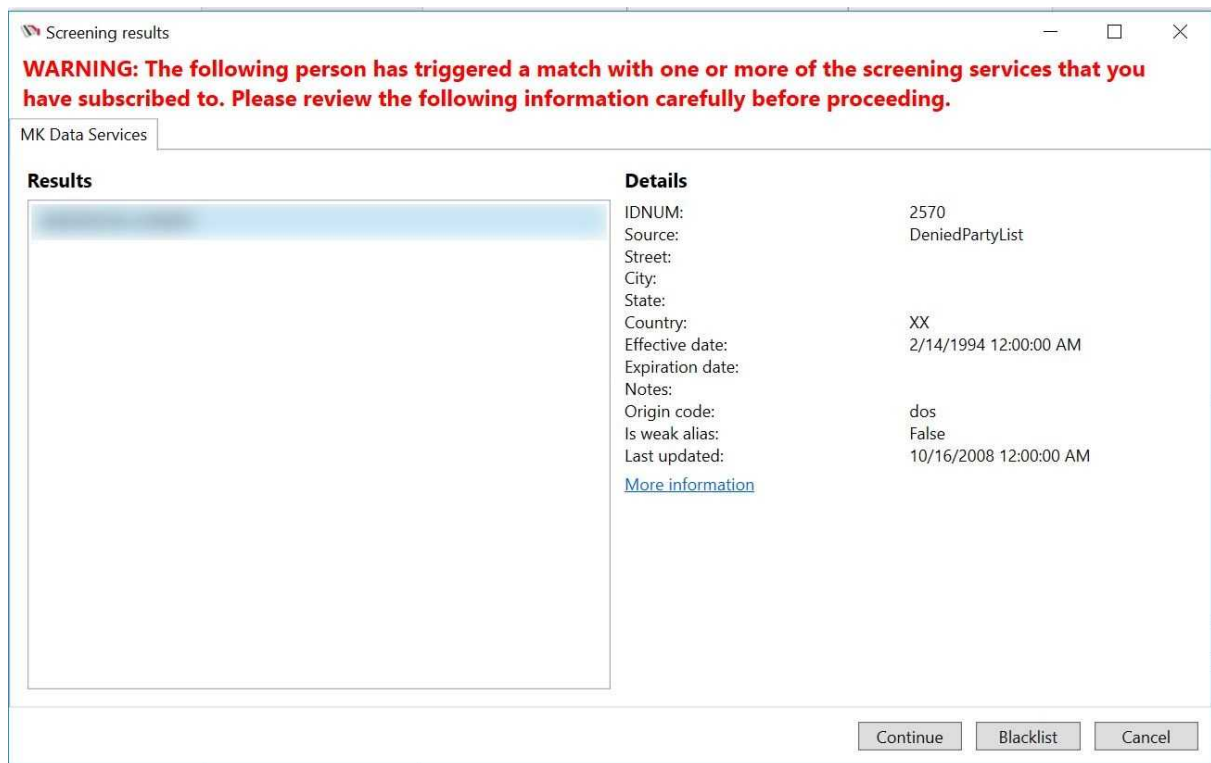


Select the tab offering the services that you subscribed too, enter the credentials, and login:



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:

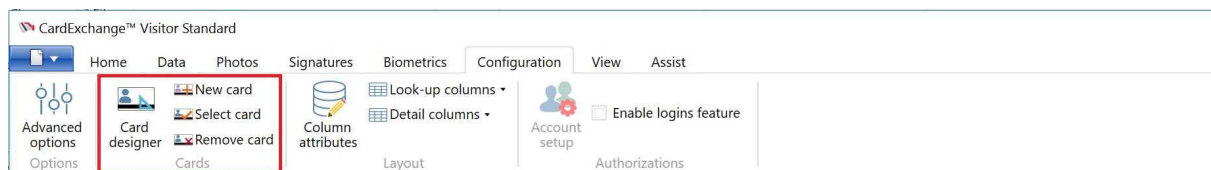


Continue will check the person in, Blacklist will put the person on the Blacklist of the visitor management system, etc.

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

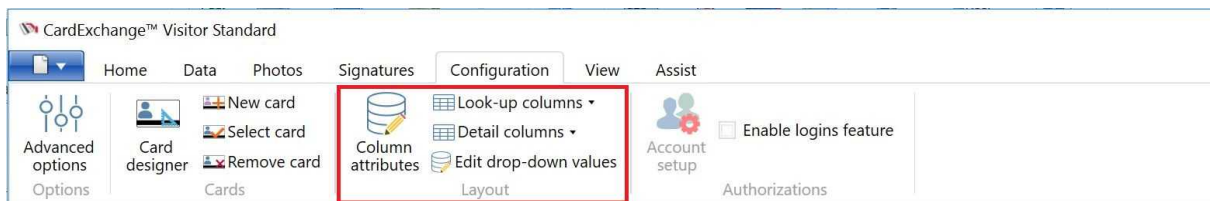
The system will continue to be logged in until you disable. When and how you screen your visitors can be defined in the [Advanced Options window](#)⁹⁴.

3.7.3 Cards



Under the cards section you can load the [Card Designer](#)¹⁶⁹ to edit the existing layout, you can also create a new card, select another existing card or remove the selected card.

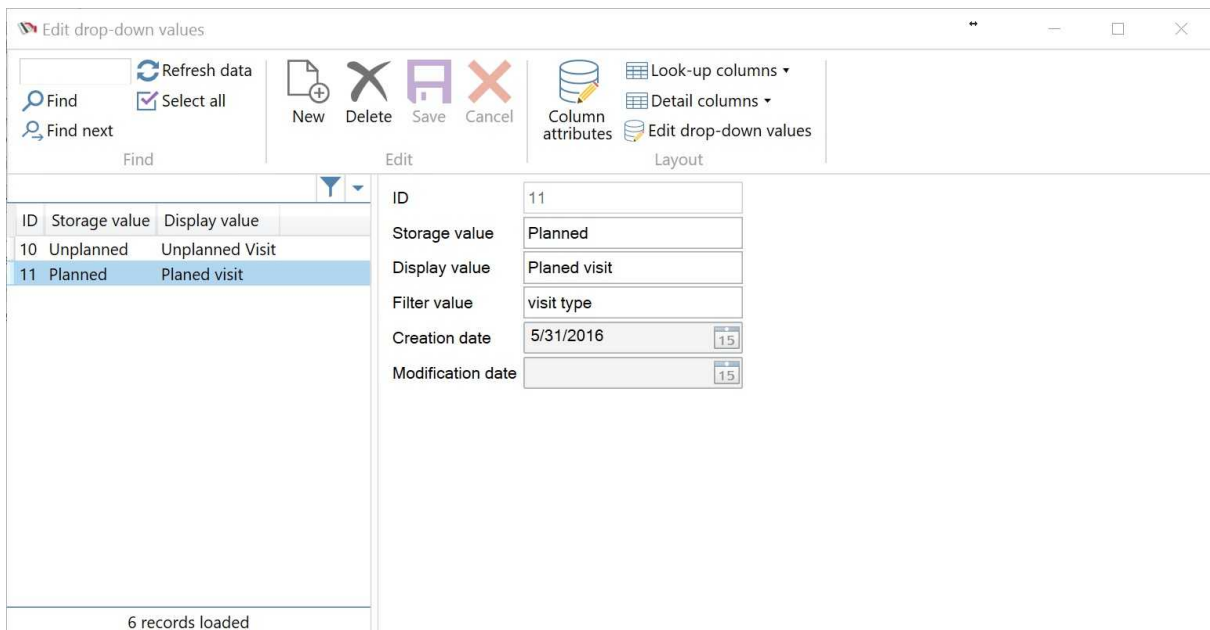
3.7.4 Layout



Under the Layout section of the ribbon it is possible to edit the [column attributes](#)¹⁰³ 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](#)¹⁰¹ to be used for columns where data entry is always from a selection of values.

3.7.4.1 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.

Column attributes

Find: Find, Find next, Refresh data, Select all, Save, Cancel, Column attributes, Look-up columns, Detail columns, Edit drop-down values

ID	Table name	Column name
46	efPerson	Email
47	efPerson	Car
48	efPerson	LicensePlate
49	efPerson	DOB
50	efPerson	Address
51	efPerson	AddressLine2
52	efPerson	City
53	efPerson	State
54	efPerson	ZIP
55	efPerson	Country
56	efPerson	Disabled
57	efPerson	Disability
58	efPerson	VIP
59	efPerson	EscortRequired
60	efPerson	EscortService
61	efPerson	Blacklisted
62	efPerson	ArrivalStatus
63	efPerson	Description
65	efPerson	Signature
66	efPerson	ScannedBusinessCard
67	efPerson	ScannedDriversLicense
70	efPerson	ExtraTextField1
71	efPerson	ExtraTextField2
90	efPerson	ExtraDateField1
100	efPerson	CreatedDate
101	efPerson	ModifiedDate
149	efPerson	BlacklistReason

40 records loaded

ID	70	Font weight	Normal
Table name	efPerson	Font style	Normal
Column name	ExtraTextField1	Foreground	#FF000000
Data type	System.String	Creation date	5/10/2016
Primary key	<input type="checkbox"/> Primary key	Modification date	5/31/2016
List visible	<input checked="" type="checkbox"/> List visible	Drop-down table name	efDropDownValue
List index	37	Drop-down storage value	StorageValue
List header		Drop-down display value	DisplayValue
List sort direction	0	Drop-down sort column	DisplayValue
Search field	<input checked="" type="checkbox"/> Search field	Drop-down filter column	FilterValue
Detail visible	<input checked="" type="checkbox"/> Detail visible	Drop-down filter value	visit type
Detail index	34		
Detail label	Visit Type		
Detail editor	Drop-down list		
Detail editable	<input checked="" type="checkbox"/> Detail editable		
Default value			
Required	<input type="checkbox"/> Required		
Mask	(000) 000-0000		
Control height	23		
Font family	Microsoft Sans Serif		
Font size	12		

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.

Visitor details

ID	1	License plate		Visit Type	Planned visit
Photo		Date of birth	1/1/1980	Creation date	5/10/2016
Title	Mr	Address		Modification date	5/31/2016
First name	Tad	City		Blacklist reason	
Last name	Torres	State			
Representing	CardExchange	ZIP code			
Phone number	925-529-4999	Country			
Mobile phone number		Disabled	<input type="checkbox"/> Disabled		
E-mail address	sales@cardexchangesolutions	Disability			
Car	<input type="checkbox"/> Car	VIP	<input type="checkbox"/> VIP		
		Escort required	<input type="checkbox"/> Escort required		
		Escort service			
		Blacklisted	<input type="checkbox"/> Blacklisted		
		Arrival status			
		Description			

ID	Title	Start date	Check-in date	Check-out date	Badge-expiration date	Description
----	-------	------------	---------------	----------------	-----------------------	-------------

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

3.7.4.2 Column Attributes

The screenshot shows the 'Column attributes' dialog box for the 'efPerson' table. The left pane lists columns, with 'LastName' selected. The right pane shows configuration options for this column. The 'List visible' checkbox is checked, and the 'Detail visible' checkbox is also checked. The 'List index' is set to 1, and the 'Detail index' is set to 6. The 'List header' is 'LastName', and the 'Detail label' is 'LastName'. The 'List sort direction' is 0, and the 'Detail editor' is 'Text box'. The 'List search field' is checked, and the 'Detail editable' checkbox is checked. The 'Default value' is empty, and the 'Required' checkbox is checked. The 'Mask' is '(000) 000-0000', the 'Control height' is 23, the 'Font family' is 'Microsoft Sans Serif', and the 'Font size' is 12.

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
Detail editor	Specify the type for the column, for example a text box or date/

	time picker
Detail editable	Specify 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 mask for a text box, for example a phone number format
Control height	Specify the height of the text box

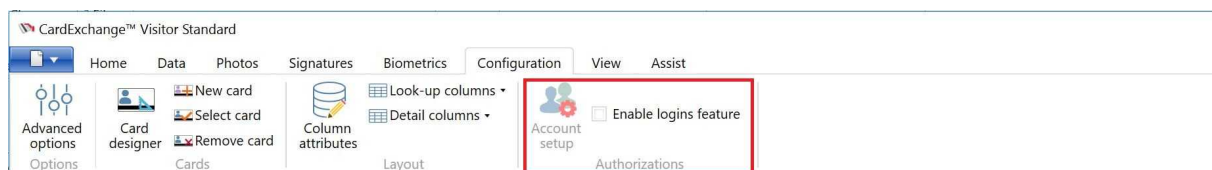
Font Options

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

3.7.5 Authorizations



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.

The screenshot shows the 'Account-setup wizard' window. On the left, under the 'Groups' tab, there is a list with one item, 'Admin', which is selected. On the right, the 'Group information' section contains two text boxes: 'Group name' with the value 'Admin' and 'Group description' with the value 'Default administrator group'. Below these are 'Add' and 'Remove' buttons. At the bottom right, the 'General settings' section has a label 'Number of days after which the passwords expire (0 means never):' followed by a text box containing the value '0'. At the very bottom of the window are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

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

In the section [Create User Authorization](#)¹⁰⁶ 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.

3.7.5.1 Create User Authorizations

Account-setup wizard

Groups

- ☐ Admin

Group information

Group name:

Group description:

General settings

Number of days after which the passwords expire (0 means never):

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.

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.

The screenshot shows a window titled "Account-setup wizard". On the left, there is a "Groups" section with a list of groups: "Admin", "Badge Production" (which is highlighted with a blue selection bar), and "Data Entry". Each group has a checkbox to its left. On the right, the "Group information" section contains two text input fields: "Group name:" with the value "Badge Production" and "Group description:" with the value "Printing badges only". Below these fields are two buttons: "Add" and "Remove". At the bottom right, there is a "General settings" section with a label "Number of days after which the passwords expire (0 means never):" and a text input field containing the value "0". At the very bottom of the window are four buttons: "Cancel", "< Back", "Next >", and "Finish".

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.

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

Account-setup wizard

Users

- ☐ Admin
- ☒ Production

User information

Username:

Full name:

Password:

Confirm password:

☐ User must change password at next login

☐ User is disabled

Assigned	Group name	Description
<input type="checkbox"/>	Admin	Default administrator group
<input type="checkbox"/>	Data Entry	Data Entry
<input checked="" type="checkbox"/>	Badge Production	Printing badges only

Add Remove

Cancel < Back Next > Finish

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**.

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!*

The screenshot shows the 'Account-setup wizard' window. On the left, under the 'Users' tab, there are two checkboxes: 'Admin' and 'Production'. The 'Production' checkbox is selected. On the right, the 'User information' section contains the following fields:

- Username: Production
- Full name: Production User
- Password: (masked with dots)
- Confirm password: (masked with dots)
- ☐ User must change password at next login
- ☐ User is disabled

A red rectangle highlights the last two options. Below this, there is a table with the following data:

Assigned	Group name	Description
<input type="checkbox"/>	Admin	Default administrator group
<input type="checkbox"/>	Data Entry	Data Entry
<input checked="" type="checkbox"/>	Badge Production	Printing badges only

At the bottom of the window, there are buttons for 'Add', 'Remove', 'Cancel', '< Back', 'Next >', and 'Finish'.

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.

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.

The screenshot shows the 'Account-setup wizard' window. On the left, under the 'Users' tab, there are two checkboxes: 'Admin' and 'Production'. The 'Production' checkbox is selected and highlighted with a blue rectangle. On the right, the 'User information' section contains the following fields:

- Username: Production
- Full name: Production User
- Password: (masked with dots)
- Confirm password: (masked with dots)
- ☐ User must change password at next login
- ☐ User is disabled

Below the user information is a table with three columns: 'Assigned', 'Group name', and 'Description'. A blue rectangle highlights the 'Assigned' column and the 'Badge Production' row.

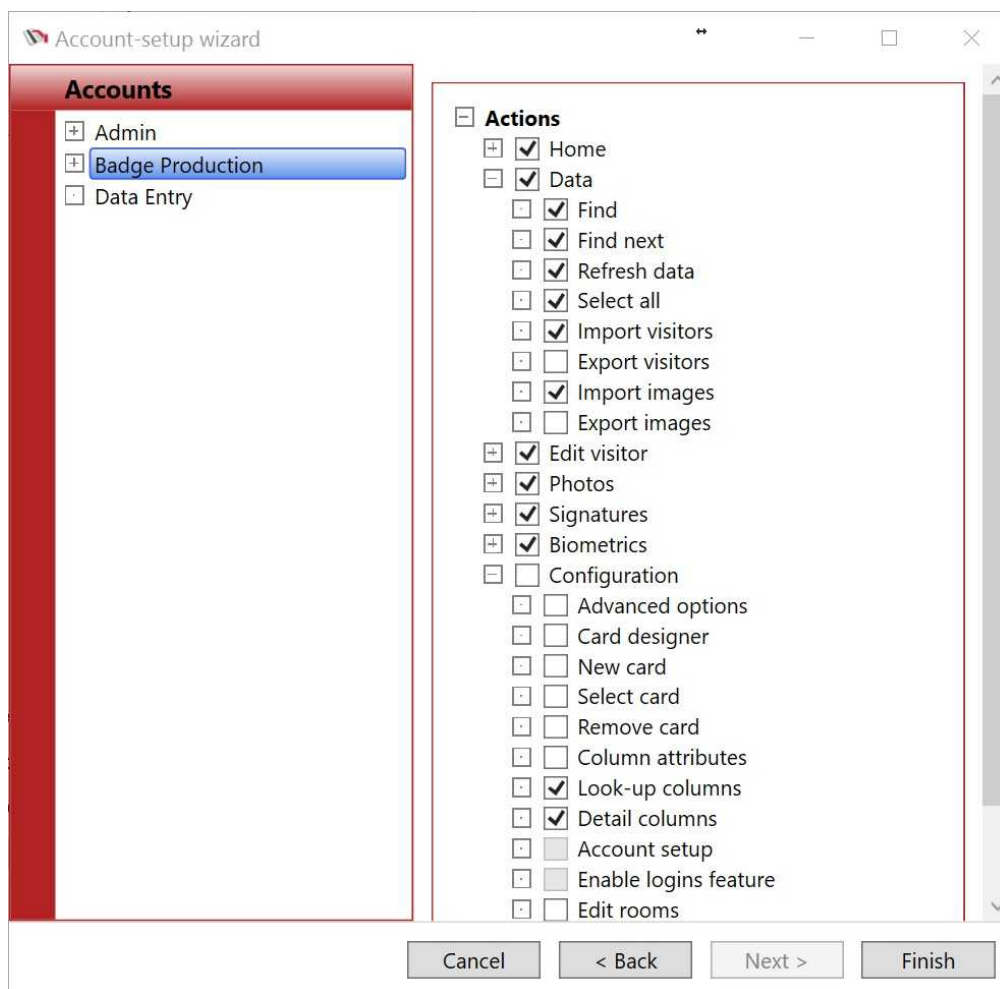
Assigned	Group name	Description
<input type="checkbox"/>	Admin	Default administrator group
<input type="checkbox"/>	Data Entry	Data Entry
<input checked="" type="checkbox"/>	Badge Production	Printing badges only


At the bottom of the table are 'Add' and 'Remove' buttons. At the bottom of the window are 'Cancel', '< Back', 'Next >', and 'Finish' buttons.

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



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**

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



Administrator or selected users and groups only

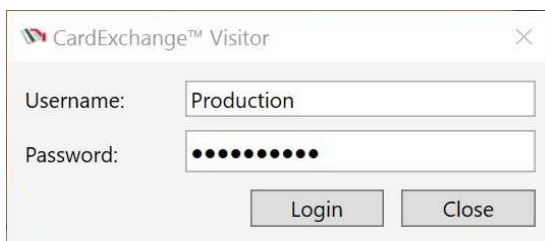
This means that the functionality is either enable at a group level, or it is functionality that cannot be disabled (Such as the "About CardExchange® Visitor" button)

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

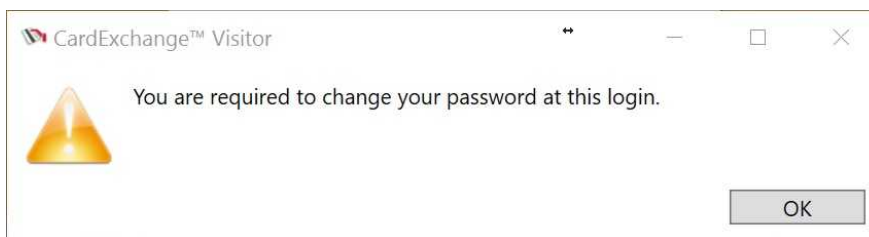
When you have defined all the groups, users, and assigned to the functionality allowed for this group and/or user, you can click on Finish to store your account definitions and close this wizard.

3.7.5.2 Users Login Access

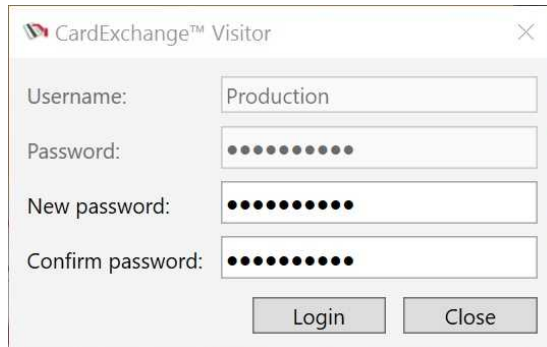
When User Authorizations is enabled, every time CardExchange® Visitor starts, the user have to login. If it is a new account, it can be that the Administrator has set the option to change the password at first login. When that is the case, the the standard login window will appear as show below:



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:



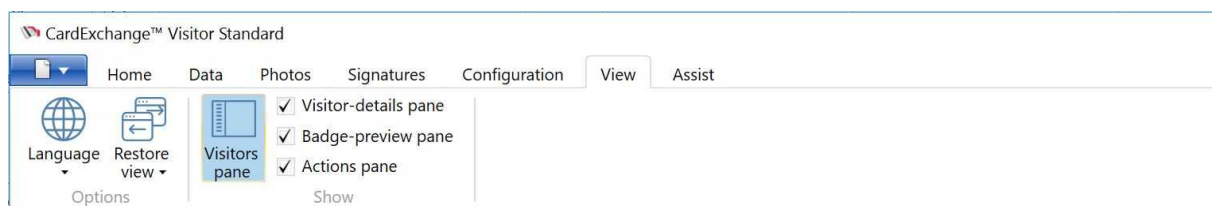
To confirm this action you have to click OK and the Change Password window will appear:



A login dialog box titled "CardExchange™ Visitor". It contains four input fields: "Username:" with the text "Production", "Password:" with masked characters, "New password:" with masked characters, and "Confirm password:" with masked characters. At the bottom are two buttons: "Login" and "Close".

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

3.8 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.

3.9 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](#) ¹⁵⁵ section of the Help file and see how this is going to benefit you!

4 Working With Events

The screenshot displays the CardExchange Visitor Standard application window. The interface is divided into several sections:

- Top Menu:** Home, Data, Configuration, View, Assist.
- Toolbar:** New event, New Item, Edit event, Delete event, All events, Today's events, Next seven days, and a checkbox for "Show incidental visits".
- Events List:** A table with columns ID, Title, Start, and End. It shows one record: "2 Sample Event 5/11/2016 10:00:00 AM 5/11/2016 11:00:00 AM".
- Event details:** A form for editing the selected event. Fields include: Event title (Sample Event), Organizer (Tad Torres), Company (None), Start date (5/11/2016 10:00:00 AM), End date (5/11/2016 11:00:00 AM), Earliest check-in allowed (5/11/2016 9:30:00 AM), and Badge-expiration date (5/11/2016 11:30:00 AM). There is also a Description field.
- Invitees:** A section for adding invitees. It shows a table with columns ID, First name, Last name, Date of birth, Address, State, City, Country, Expiration date, and Is host. One invitee is listed: "3 Nadine Williams".
- Footer:** Visitors, Events, Assist. On the right, there are buttons for "Expired badges 0" and "Evacuation report". A status bar at the bottom indicates "There are no unread news items."

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.

4.1 Layout

CardExchange™ Visitor Standard

Home Data Configuration View Assist

New event New Item Edit event Delete event All events Today's events Next seven days Show incidental visits

Filters

Events

ID	Title	Start	End
2	Sample Event	5/11/2016 10:00:00 AM	5/11/2016 11:00:00 AM

1 records loaded

Event details

Event title: Sample Event

Organizer: Tad Torres

Company: None

Start date: 5/11/2016 10:00:00 AM

Earliest check-in allowed: 5/11/2016 9:30:00 AM

End date: 5/11/2016 11:00:00 AM

Badge-expiration date: 5/11/2016 11:30:00 AM

Description:

Invitees

ID	First name	Last name	Date of birth	Address	State	City	Country	Expiration date	Is host
3	Nadine	Williams							

Visitors Events Assist

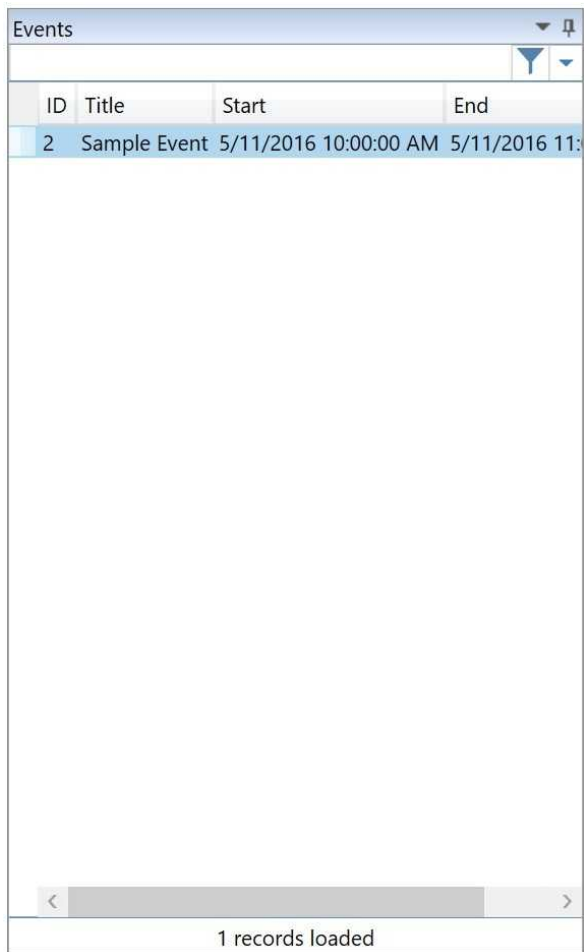
Expired badges 0 Evacuation report

There are no unread news items.

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.

4.1.1 Events Pane

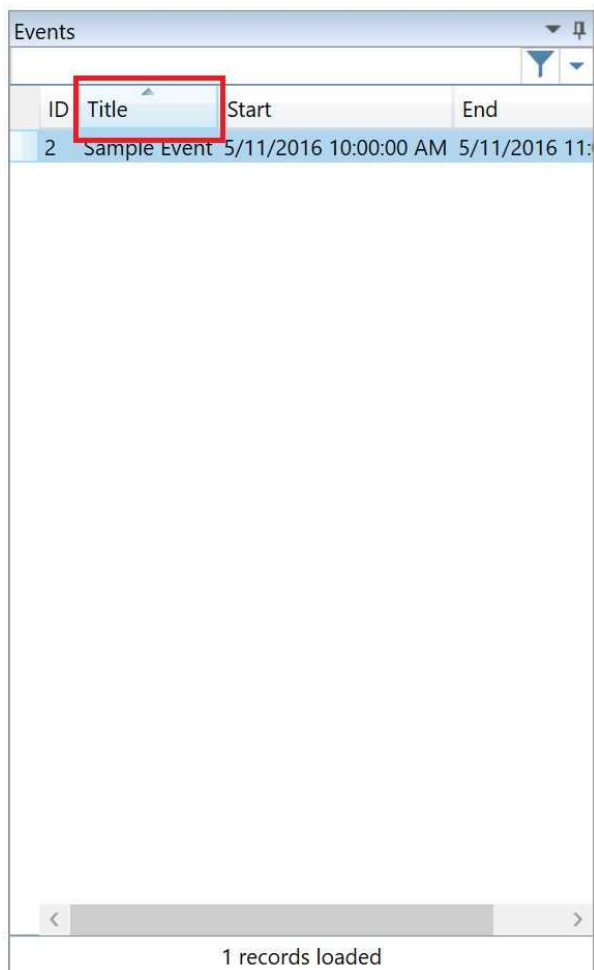


ID	Title	Start	End
2	Sample Event	5/11/2016 10:00:00 AM	5/11/2016 11:00:00 AM

1 records loaded

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

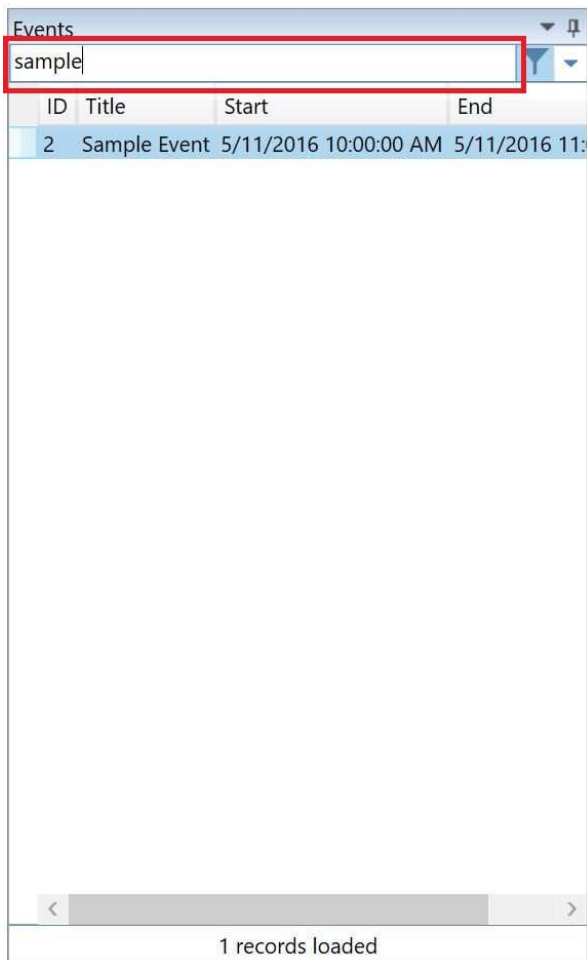


ID	Title	Start	End
2	Sample Event	5/11/2016 10:00:00 AM	5/11/2016 11:00:00 AM

1 records loaded

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

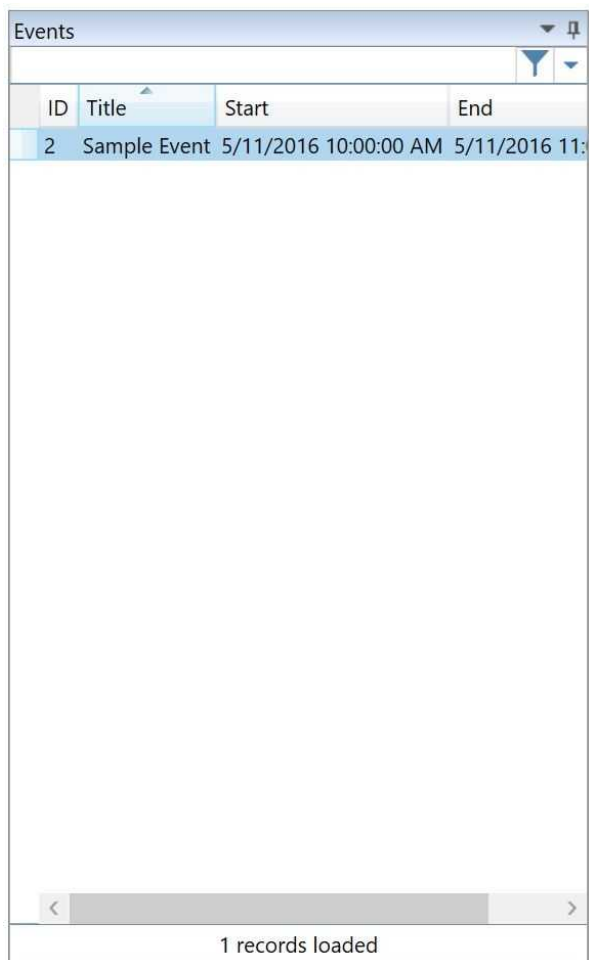


The screenshot shows a software interface titled "Events". At the top, there is a search text box containing the word "sample", which is highlighted with a red rectangular border. Below the search box is a table with four columns: "ID", "Title", "Start", and "End". The table contains one row of data. Below the table is a horizontal scrollbar and a status bar at the bottom that reads "1 records loaded".

ID	Title	Start	End
2	Sample Event	5/11/2016 10:00:00 AM	5/11/2016 11:30:00 AM

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



ID	Title	Start	End
2	Sample Event	5/11/2016 10:00:00 AM	5/11/2016 11:00:00 AM

1 records loaded

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

4.1.2 Event Details Pane

Event details

Event title: Test Event 12

Organizer: Elliot Davis

Start date: 9/13/2016 1:00:00 PM Earliest check-in allowed: 9/13/2016 12:30:00 PM

End date: 9/13/2016 2:00:00 PM Badge-expiration date: 9/13/2016 2:30:00 PM

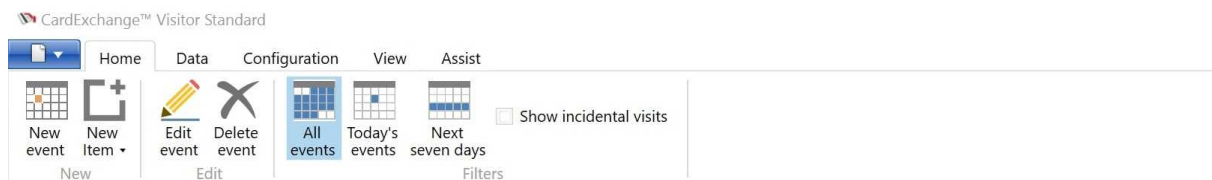
Description:

ID	First name	Last name	Date of birth	Address	State	City	Country	Expiration date	Is host
2	Craig	Bechelli							
1	Elliot	Davis	10/2/1976						

Invitees Rooms Documents Lobbies

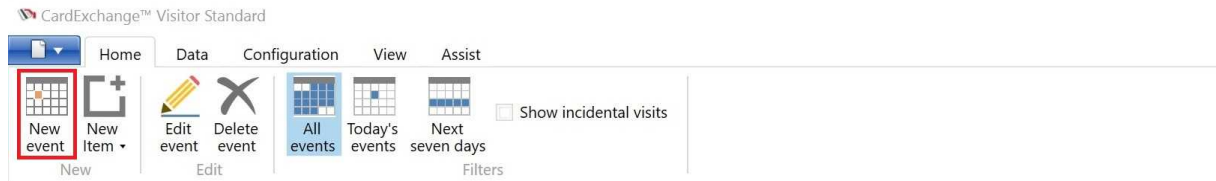
The Event details pane shows the main details for the selected event including start/end times, the organizer of the event and earliest check-in/expiration times. Also shown in the tabs at the bottom are the invitees, the selected rooms for the meeting, any documents that are required to be signed and the lobbies that can be used.

4.2 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.

4.2.1 New event



Clicking on [New event](#) ¹²² will open the New event window.

ID	First name	Last name	Date of birth	Address	State	City	Country	Is host
2	John	Smith						<input type="checkbox"/>

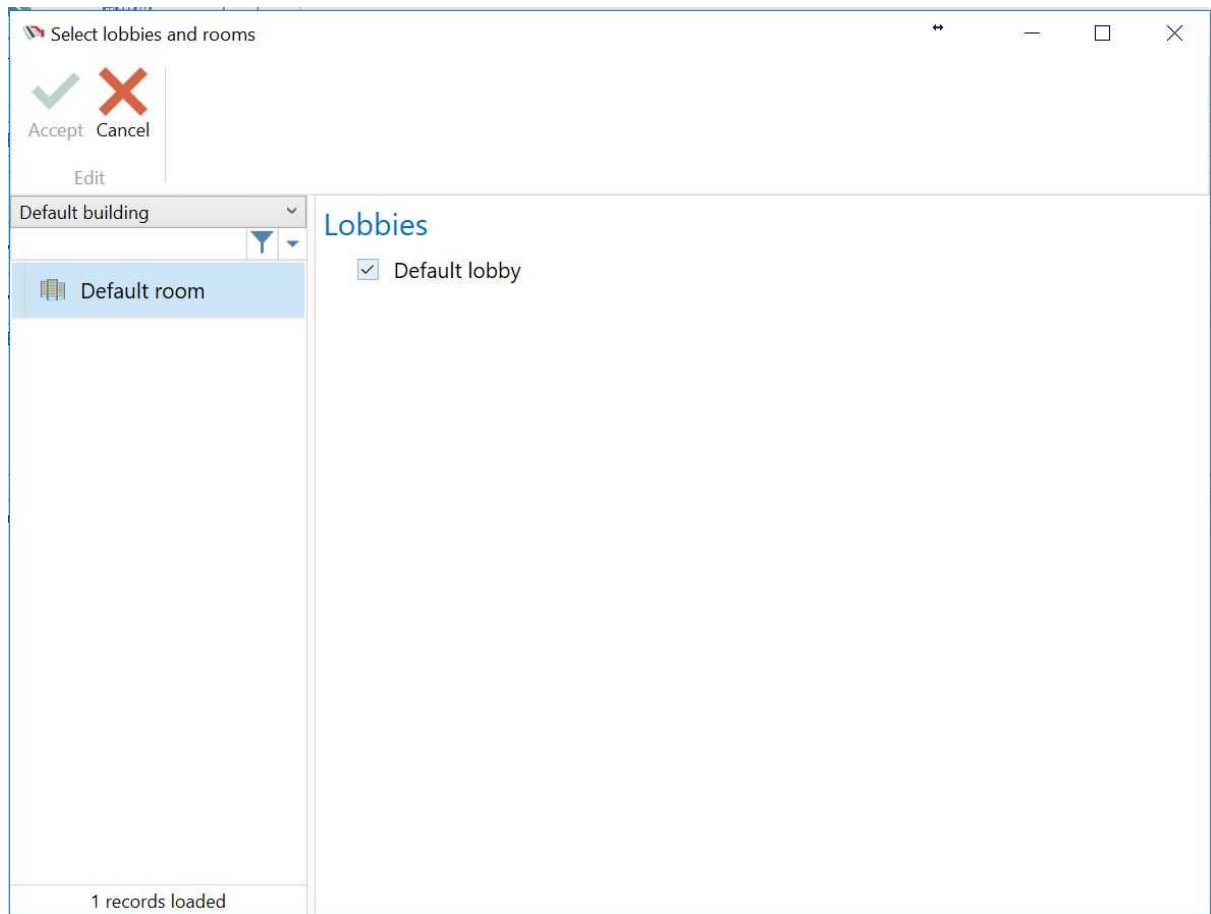
Here you can enter all the details for the event, set start and end dates and select invitees/groups.

The 'Invitees' window has a title bar with standard window controls. Below the title bar is a toolbar with a green checkmark icon labeled 'Accept', a red 'X' icon labeled 'Cancel', and an 'Edit' button. The main area is divided into two panels. The left panel, titled 'Visitors', contains a list of two items: 'Alissa Keller' (with a blue circle icon) and 'Nadine Williams' (with a green circle icon). Below the list is a status bar that says '2 records loaded'. The right panel, titled 'Invitees', contains a list with one item: 'Tad Torres' (with a green circle icon). Below the list is a status bar that says '1 records loaded'. Between the two panels are two buttons: 'Add' with a blue arrow pointing right, and 'Remove' with a purple arrow pointing left.

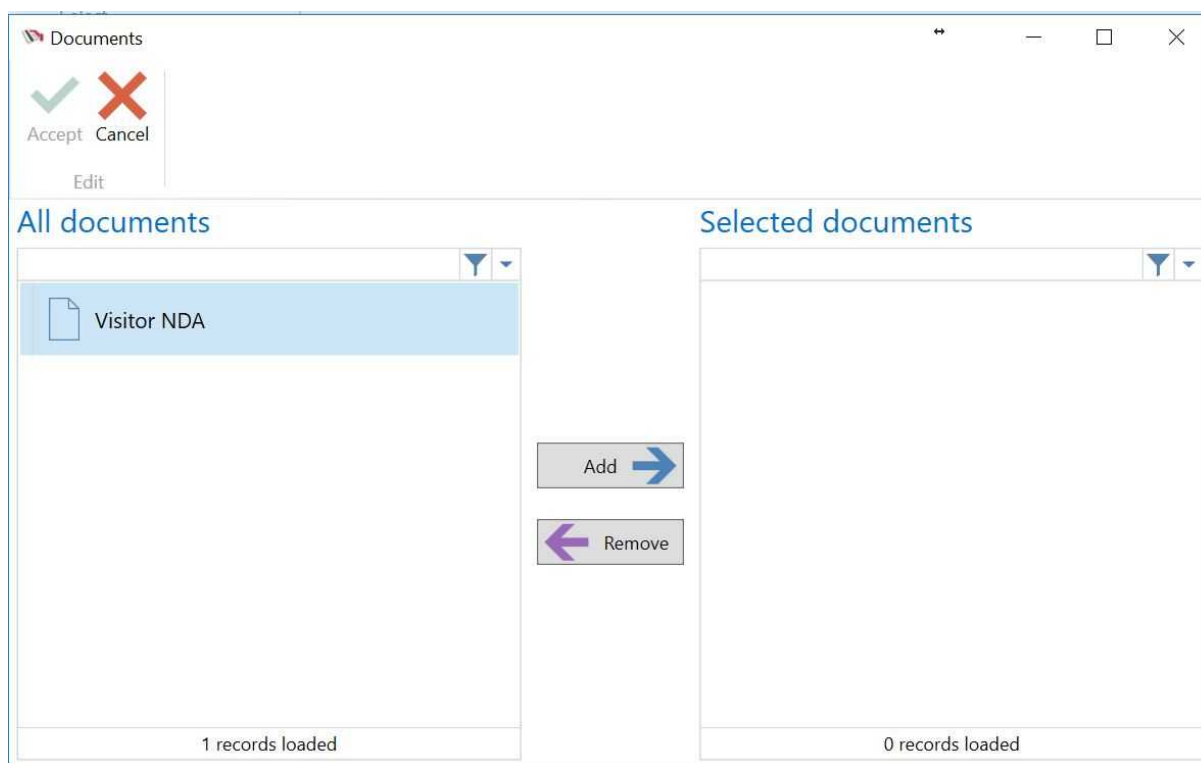
Clicking on Select invitees allows you to select visitors from the list and add them to the event.

The 'Groups' window has a title bar with standard window controls. Below the title bar is a toolbar with a green checkmark icon labeled 'Accept', a red 'X' icon labeled 'Cancel', and an 'Edit' button. The main area is divided into two panels. The left panel, titled 'Groups', is currently empty. Below it is a status bar that says '0 records loaded'. The right panel, titled 'Select Groups', contains a list with one item: 'Group 1 Demo' (with a group icon). Below the list is a status bar that says '1 records loaded'. Between the two panels are two buttons: 'Add' with a blue arrow pointing right, and 'Remove' with a purple arrow pointing left.

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

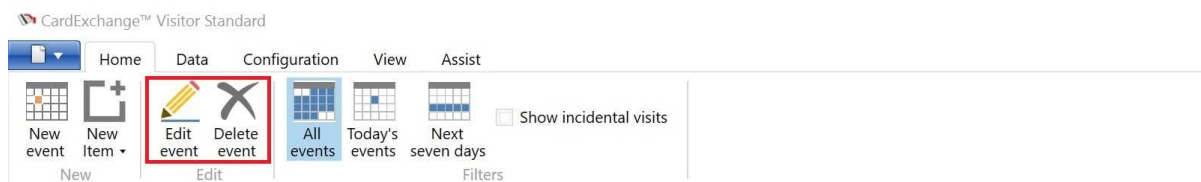


When clicking on Select Lobbies and Rooms you can select the room to be used for the event as well as the lobbies where the visitors can check-in.



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](#).¹⁴³

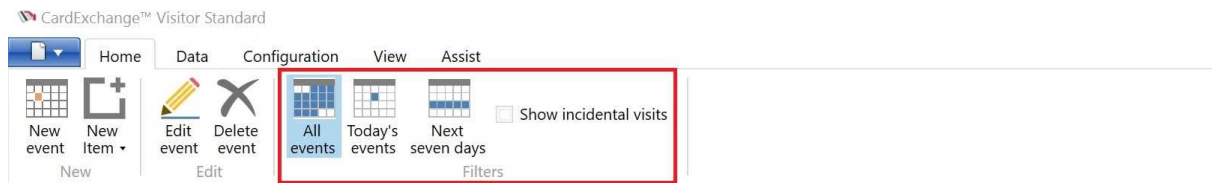
4.2.2 Edit



Event details can be edited in four steps:

- First select the event from the Events pane that you wish to edit.
- Then either click on Edit event from either the Home tab.
- Click on the detail you want to edit and change it, you can also amend the invitees if you need to.
- Click on the **Save & Close** button to save the data into the database, or on the **Cancel** button if you do not want that.

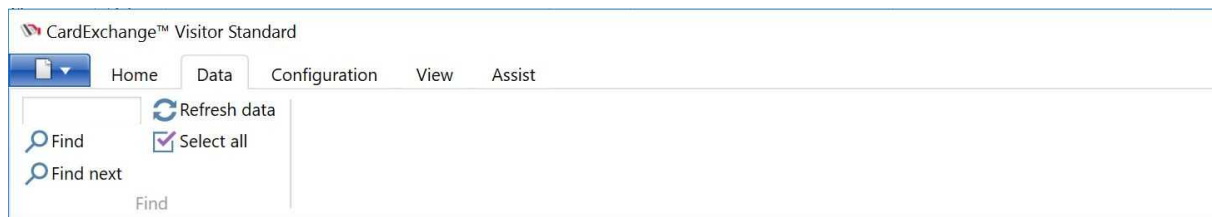
4.2.3 Filters



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

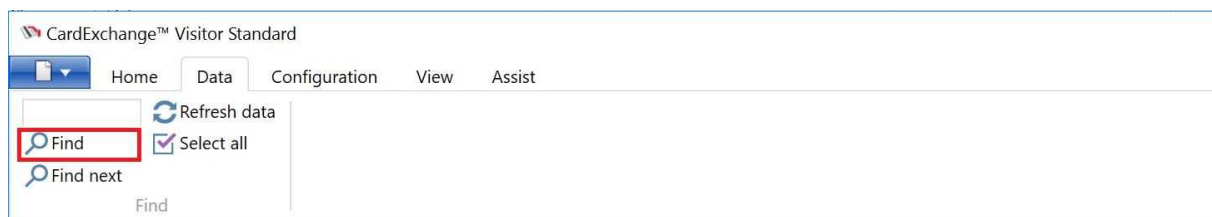
4.3 Data



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.

4.3.1 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.

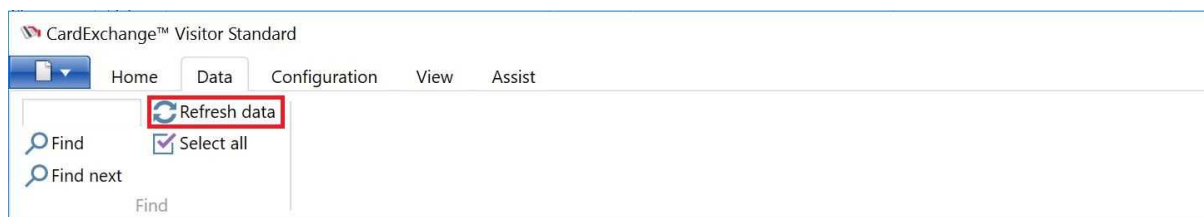
The advantage of searching in this way is that the text you enter does not need to be at the start of an element in the events pane. The search does not make a distinction between uppercase and lowercase characters.

With this **Find** function, all elements in the [Events pane](#)¹¹⁷ 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.

4.3.2 Using Keyboard

The **find** functions that have been discussed in the section [Using Find](#)¹²⁶ 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.

4.3.3 Refresh Data

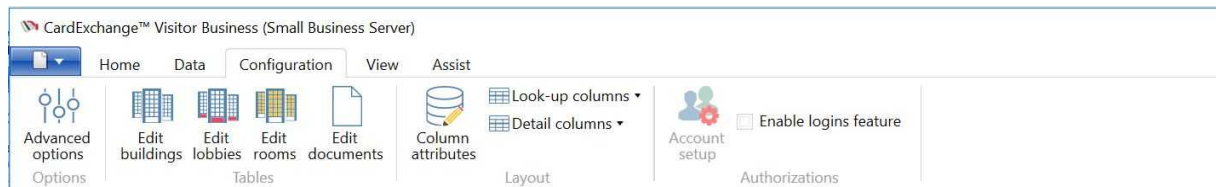


It is possible that you cannot find the intended record because it has only just been entered into the database. The details of the record in question have already been entered into the database, but CardExchange® Visitor has not yet, as it were, seen it. You can solve this problem by selecting the **Refresh 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.

4.4 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.

4.4.1 Advanced Options

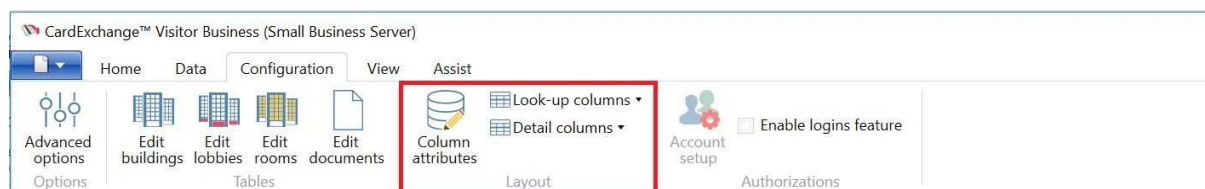


Clicking on Advanced Options will show a window where you can changes some advanced settings of CardExchange® Visitor.

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](#)⁸⁷ 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.

4.4.2 Layout



Under the Layout section of the ribbon it is possible to edit the [column attributes](#)¹⁰³ 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](#)¹⁰¹ to be used for columns where data entry is always from a selection of values.

4.4.2.1 Column Attributes

ID	Table name	Column name
105	efEvent	ID
106	efEvent	Title
107	efEvent	CompanyID
108	efEvent	EventCategoryID
109	efEvent	EventTypeID
110	efEvent	OrganizerID
111	efEvent	StartDate
112	efEvent	EndDate
113	efEvent	EarliestCheckInAllowed
114	efEvent	BadgeExpirationDate
115	efEvent	Description
116	efEvent	CreatedDate
117	efEvent	ModifiedDate
173	efEvent	OrganizerName

ID	105	Drop-down table name	
Table name	efEvent	Drop-down storage value	
Column name	ID	Drop-down display value	
Data type	System.Int64	Drop-down sort column	
Primary key	<input checked="" type="checkbox"/> Primary key	Drop-down filter column	
List visible	<input checked="" type="checkbox"/> List visible	Drop-down filter value	
List index	0	Control height	23
List header		Font family	Microsoft Sans Serif
List sort direction	0	Font size	12
Search field	<input checked="" type="checkbox"/> Search field	Font weight	Normal
Detail visible	<input checked="" type="checkbox"/> Detail visible	Font style	Normal
Detail index	2147483647	Foreground	#FF000000
Detail label		Creation date	9/6/2016 [15]
Detail editor	Text box	Modification date	9/6/2016 [15]
Detail editable	<input type="checkbox"/> Detail editable		
Default value			
Required	<input checked="" type="checkbox"/> Required		
Mask	(000) 000-0000		

14 records loaded

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
Detail editor	Specify the type for the column, for example a text box or date/

time picker	
Detail editable	Specify 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 mask for a text box, for example a phone number format

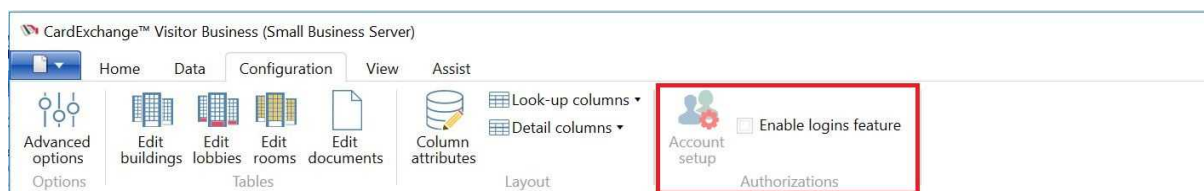
Font Options

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

4.4.3 Authorizations

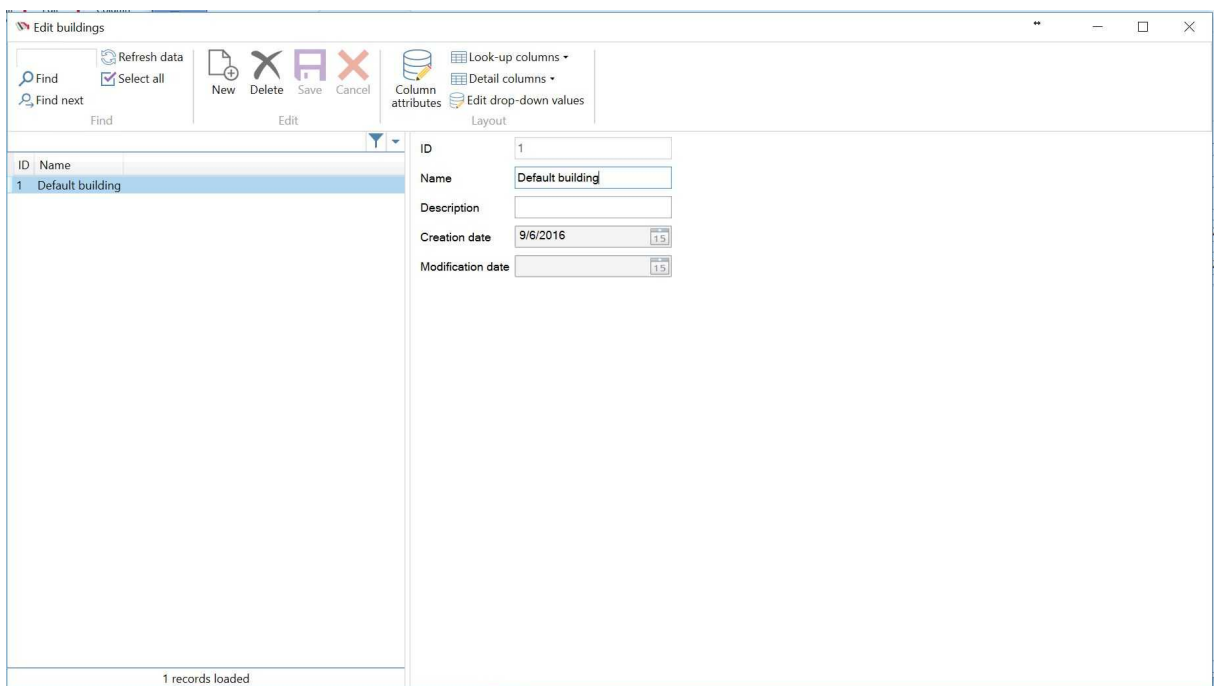


The Authorizations section is the same as mentioned in the [Authorizations](#)¹⁰⁴ section of the Working With Visitors.

4.4.4 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.

4.4.5 Lobbies



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

facility.

Edit lobbies

Find: Find, Find next, Refresh data, Select all

Edit: New, Delete, Save, Cancel

Select: Edit rooms, Select rooms

Layout: Column attributes, Look-up columns, Detail columns, Edit drop-down values

ID	Name
1	Default lobby

1 records loaded

ID 1

Building ID Default building

Name Default lobby

Description

Creation date 9/6/2016

Modification date

Rooms

ID	Name	Description
1	Default room	

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.

The 'Edit rooms' window displays a table of rooms and a form for editing the selected room. The table has columns for ID and Name. The first row is selected, showing ID 1 and Name 'Default room'. The form on the right allows editing the room's details, including Building ID, Name, Description, Creation date, and Modification date.

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

The 'Rooms' window displays two panels: 'Rooms' and 'Selected rooms'. The 'Rooms' panel shows a table of rooms with columns ID and Name. The first row is selected, showing ID 1 and Name 'Default room'. The 'Selected rooms' panel is empty. Between the panels are 'Add' and 'Remove' buttons. The status bar at the bottom indicates '1 records loaded' for the Rooms panel and '0 records loaded' for the Selected rooms panel.

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

event.

4.4.6 Rooms



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

 The 'Edit rooms' window displays a form for editing a room. On the left, a table lists existing rooms:

ID	Name
1	Default room

 The main form area contains the following fields:

- ID:** 1
- Building ID:** Default building (dropdown menu)
- Name:** Default room
- Description:** (empty text box)
- Creation date:** 9/6/2016 (calendar icon)
- Modification date:** (calendar icon)

 Below the main form, there is a section titled 'Lobbies' with a table:

ID	Name	Description
1	Default lobby	

 The status bar at the bottom indicates '1 records loaded'.

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.

1 records loaded

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

1 records loaded

0 records loaded

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

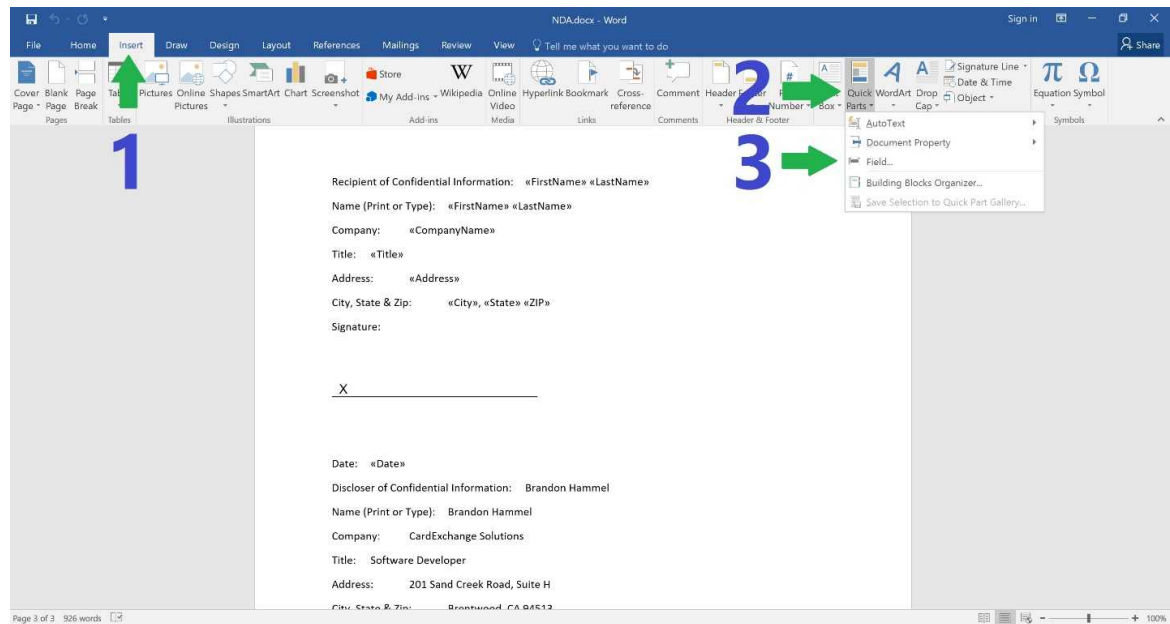
event.

4.4.7 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.

4.4.7.1 Designing a Document

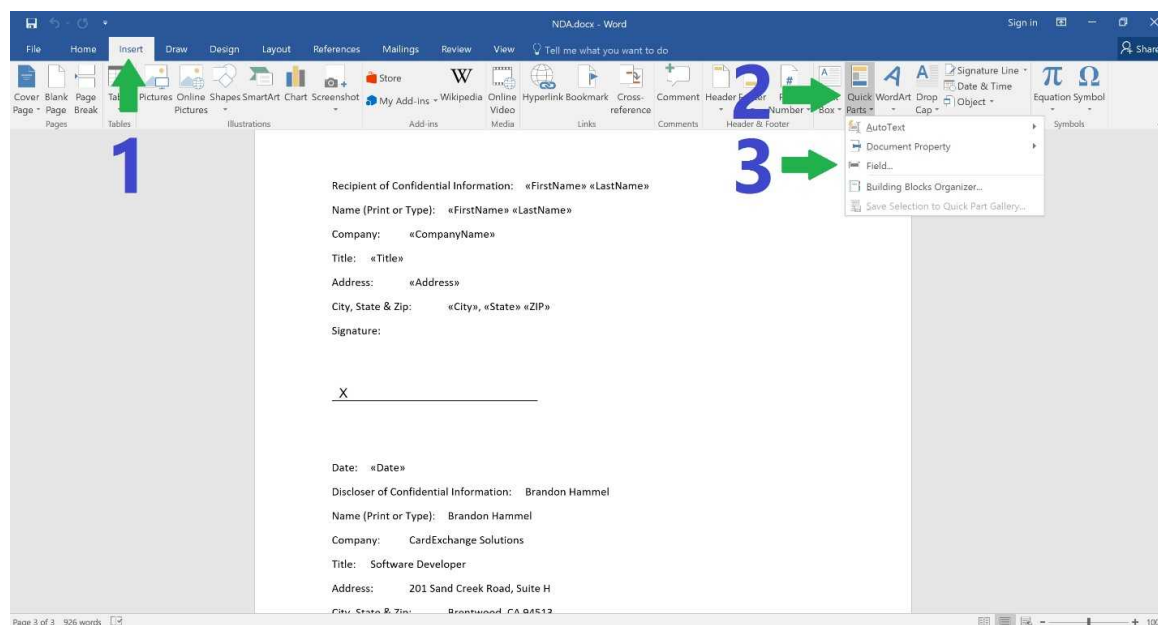
CardExchange® Visitor utilizes the powerful Merge fields feature within Microsoft Word to allow for easy merging of data into documents. The user is able to define custom mappings between merge fields and person details.



4.4.7.1.1 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:



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.

4.4.7.1.2 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:

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.

4.4.7.2 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.

ID	Description	Req. for in. check-ins	Req. by default
0 records loaded			

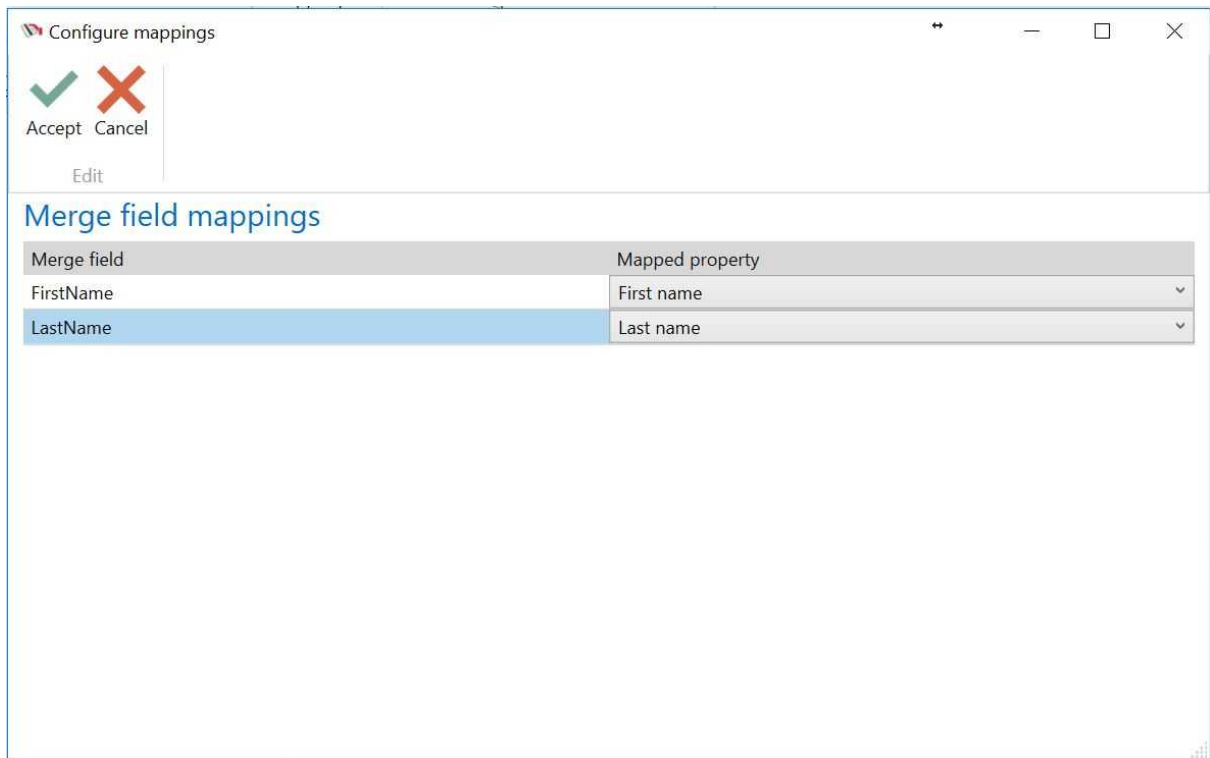
ID: 0
 Description: Visitor NDA
 Location: C:\Users\Craig Bechell\ID ...
 Req. for in. check-ins: ☒ Req. for in. check-ins
 Req. by default: ☐ Req. by default
 In use: ☒ In use
 Creation date:
 Modification date:
 Validity duration (days): 0

Merge field mappings

Merge field	Mapped property
FirstName	
LastName	

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.

- 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.

The 'Edit documents' window displays a table with one record and a form for editing its details.

ID	Description	Req. for in. check-ins	Req. by default
1	Visitor NDA	<input checked="" type="checkbox"/>	<input type="checkbox"/>

1 records loaded

Form Fields:

- ID: 1
- Description: Visitor NDA
- Location: C:\Users\Craig Bechelli\ID
- Req. for in. check-ins: ☒ Req. for in. check-ins
- Req. by default: ☐ Req. by default
- In use: ☒ In use
- Creation date: 9/12/2016
- Modification date: 9/12/2016
- Validity duration (days): 0

Merge field mappings

Merge field	Mapped property
FirstName	First name
LastName	Last name

4.4.7.3 Adding Documents To Events

The 'New event' window displays event details and a list of documents.

Event Details:

- Title: Business Edition Demo Event
- Organizer: Craig Bechelli
- Start: Monday, September 12, 2016 2:00:00 PM
- End: Monday, September 12, 2016 3:00:00 PM
- Earliest check-in allowed: Monday, September 12, 2016 1:30:00 PM
- Badge expiration date: Monday, September 12, 2016 3:30:00 PM
- Description: Business Edition Demo Event

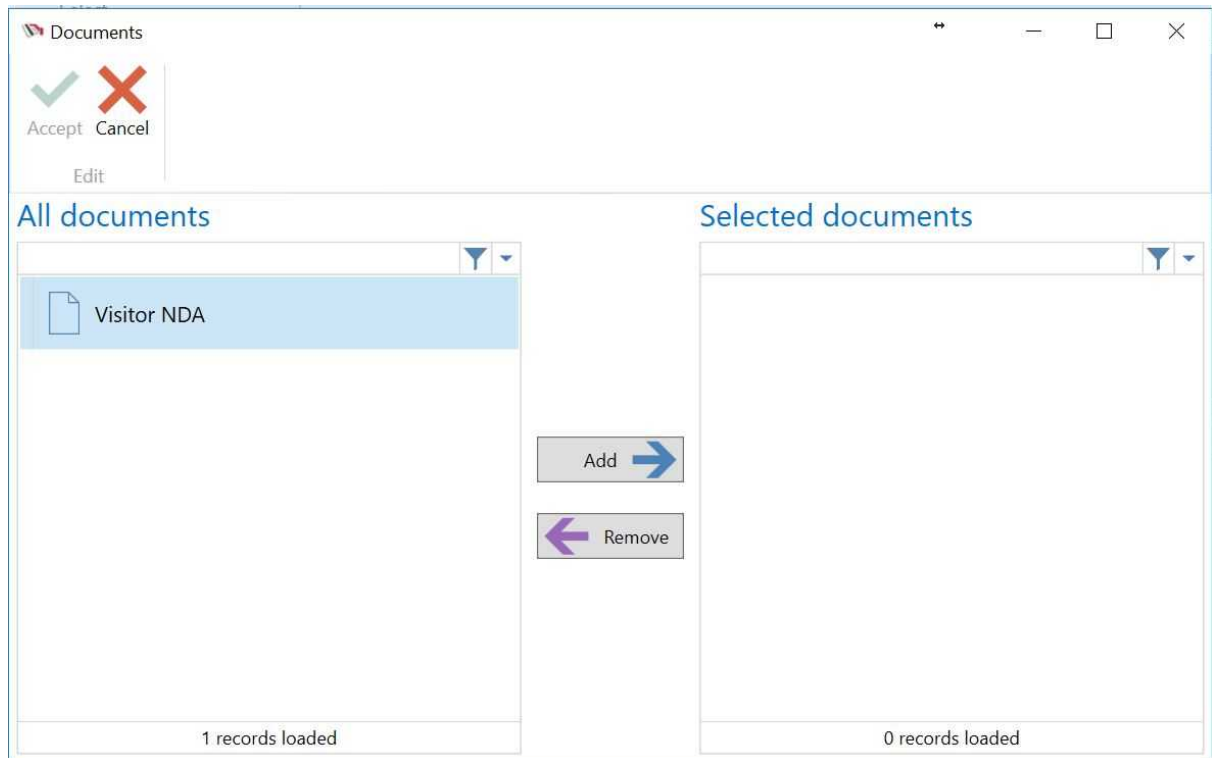
Documents:

ID	Description
1	Visitor NDA

Invites | Rooms | Lobbies | Documents

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.

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”](#)¹⁴⁰).
 - 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 “Selected documents” column will result in a popup warning, and the document will remain in the “Selected documents” column.

- 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.

4.4.7.4 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.

Check-in

Sign documents

Please review and sign the following documents to check-in.

Document 1 of 1: Visitor NDA

CardExchange SOLUTIONS

VISITOR AGREEMENT

This Visitor Agreement for John Smith Agreement (the "Amendment") is effective Saturday, September 10, 2016 (the "Effective Date").

BETWEEN: CardExchange Solutions Inc. ("CARDEXCHANGE"), a company organized and existing under the laws of the United States with its principal office located at 201 Sand Creek Road, Brentwood, CA 94514

AND: John Smith (the "VISITOR"), a person existing under the laws of the United States.

On Saturday, September 10, 2016, CARDEXCHANGE and VISITOR (collectively the "Parties") entered into a Visitor Agreement (the "Agreement"). The Parties hereby agree that the Agreement is as follows:

The following provision shall and hereby does activate Section 2.4 of the Agreement in its entirety:

2.4 POLICIES

VISITOR agrees to comply with CARDEXCHANGE's written policies, as such policies are amended from time to time. VISITOR acknowledges, understands and agrees that failure to comply with CARDEXCHANGE's written policies may result in immediate removal by CARDEXCHANGE.

IN WITNESS WHEREOF, the VISITOR has executed this agreement on the date first set forth above.

John Smith

X

Print Sign

Cancel < Back Next > Finish

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.

- 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:

NDA.pdf (SECURED) - Adobe Acrobat Reader DC

File Edit View Window Help

Home Tools NDA.pdf (SECURED) x

3 / 3 240%

Recipient of Confidential Information: Graciela Ruta


Name (Print or Type): Graciela Ruta

Company: Buckley Miller & Wright

Address: 98 Connecticut Ave Nw

City, State & Zip: Chagrin Falls, OH 44023

Signature:

X 

Signature Properties

Signature is VALID, signed by CardExchange™ Visitor.

Signing Time: 2016/08/15 10:52:35 -07'00'

Reason: Ruta, Graciela - Incidental check-in on 8/15/2016 10:52:35 AM

Location: Brandon's office

Validity Summary

The document has not been modified since this signature was applied.

The certifier has specified that Form Fill-in, Signing and Commenting are allowed for this document. No other changes are permitted.

The signer's identity is valid.

Signing time is from the clock on the signer's computer.

Signature was validated as of the signing time: 2016/08/15 10:52:35 -07'00'

Signer Info

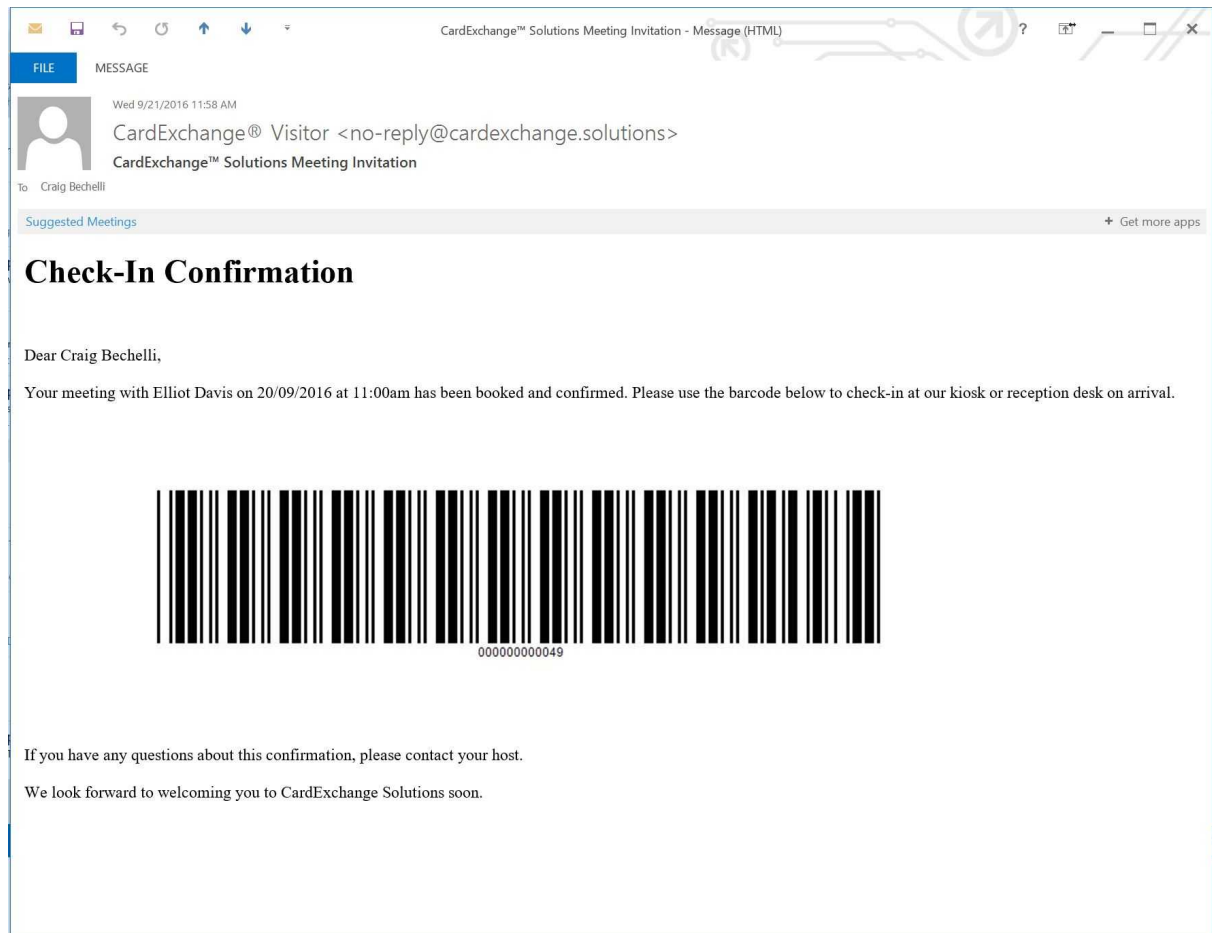
Path validation checks were successful.

Revocation checking is not performed for Certificates that you have directly trusted.

[Show Signer's Certificate...](#)

[Advanced Properties...](#) [Validate Signature](#) [Close](#)

4.4.8 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.

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.

4.5 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.


4.6 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.

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](#)  section of the Help file and see how this is going to benefit you!

5 Working With Reports

CardExchange™ Visitor Standard

Home View Assist

Print report Zoom in Zoom out 100% Two pages Fit width

Reports

- Evacuation Report
Report of all visitors in the building
- Visitor History
Report of a visitor's event history
- Event Invitees
Report of all the invitees of a particular event

Records

This report type does not require record selection

Report Preview

Evacuation report
Tuesday, May 31, 2016 10:56 AM
There are 2 people in the building!

#	Photo	Last name	First name	Mobile phone	Disabled	Disability	Event	Host
2		Keller	Alissa	012-345-6789			Incidental visit	
3		Williams	Nadine	123-456-7890			Sample Event	X

3 reports loaded

Visitors Events Reports Assist

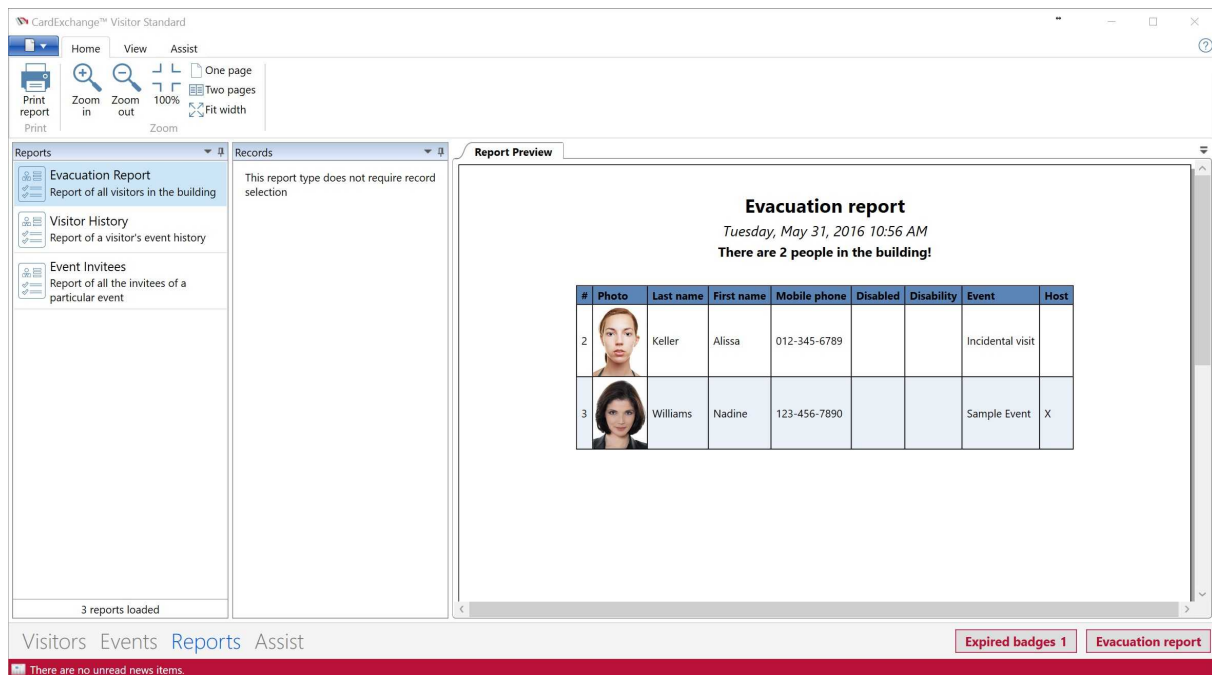
Expired badges 1 Evacuation report

There are no unread news items.

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..

5.1 Evacuation Report

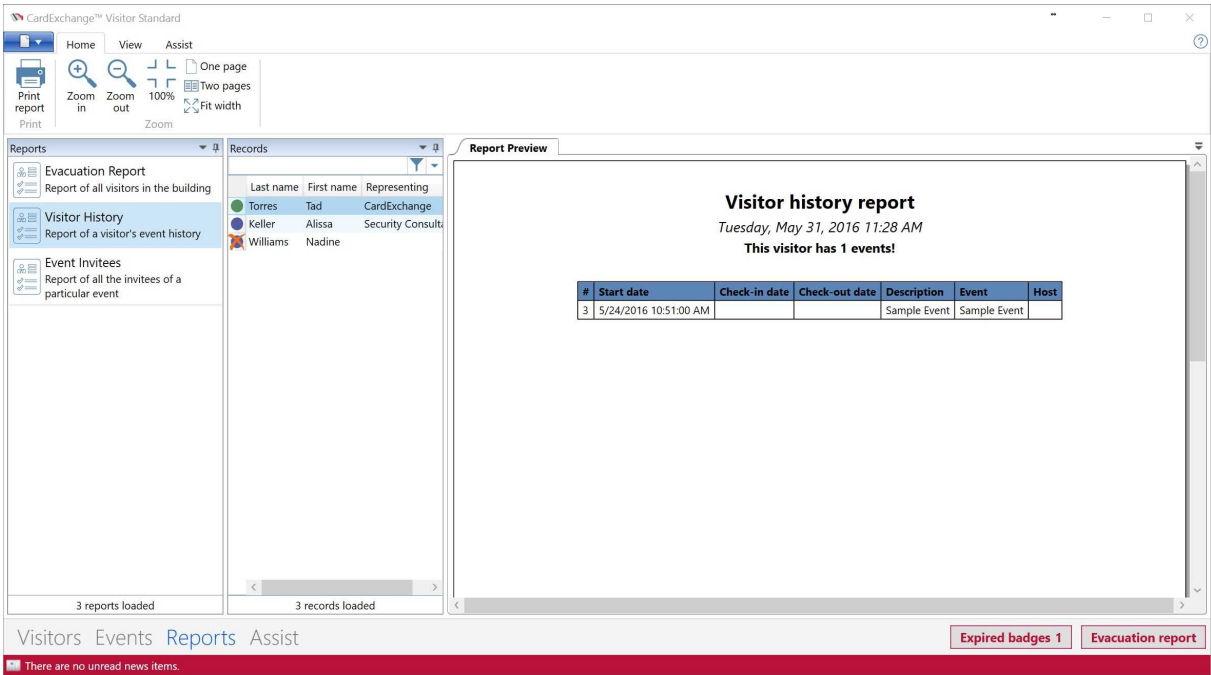


In the event of an emergency you can click select the Evacuation report to quickly preview and print out a report of all visitors currently checked-in.

The Evacuation report shows the key information for each person currently checked-in, this includes the following.

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

5.2 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.

5.3 Event Invitees

The screenshot displays the CardExchange Visitor Standard application window. The interface includes a top menu bar with 'Home', 'View', and 'Assist' options. Below this is a toolbar with icons for 'Print report', 'Zoom in', 'Zoom out', '100%', and 'Fit width'. The main area is divided into three sections: 'Reports', 'Records', and 'Report Preview'. The 'Reports' section on the left lists 'Evacuation Report', 'Visitor History', and 'Event Invitees'. The 'Records' section in the middle shows a table with columns 'ID', 'Title', and 'Start', containing one record: '2 Sample Event 5/24/2016 10:51:00 AM'. The 'Report Preview' section on the right displays the 'Event invitees report' for 'Tuesday, May 31, 2016 11:29 AM', noting 'This event has 2 invitees!'. Below this is a table with columns: '#', 'Full name', 'Start date', 'Check-in date', 'Check-out date', 'Event', 'Description', and 'Host'. The table contains two rows of data for Nadine Williams and Tad Torres. At the bottom, there is a status bar with 'Visitors Events Reports Assist' tabs, a red bar indicating 'Expired badges 1' and 'Evacuation report', and a message 'There are no unread news items.'

#	Full name	Start date	Check-in date	Check-out date	Event	Description	Host
2	Nadine Williams	5/24/2016 10:51:00 AM	5/24/2016 10:50:56 AM		Sample Event	Sample Event	X
3	Tad Torres	5/24/2016 10:51:00 AM			Sample Event	Sample Event	

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.

6 Working With Assist



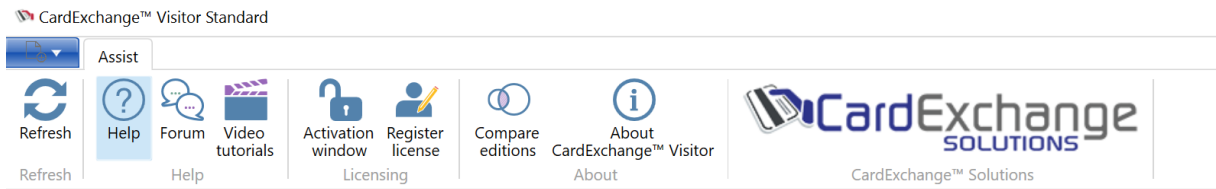
With the release of CardExchange® Visitor we bring unique innovation to your desktop by offering everything that you need to produce cards in a fast and secure way at hand in **CardExchange® Visitor Assist**.

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.

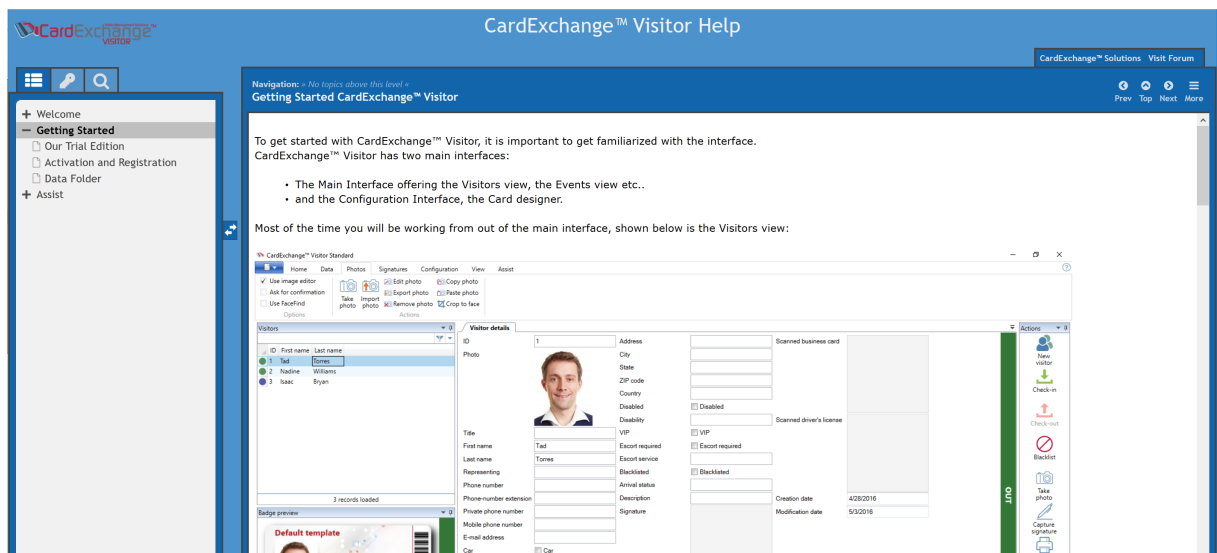
CardExchange® Visitor uses this section to keep you informed about new updates and release plans so you will always be able to run the latest version. But also the reseller who has sold the product to you will keep you informed about his latest and greatest.

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

6.1 Help



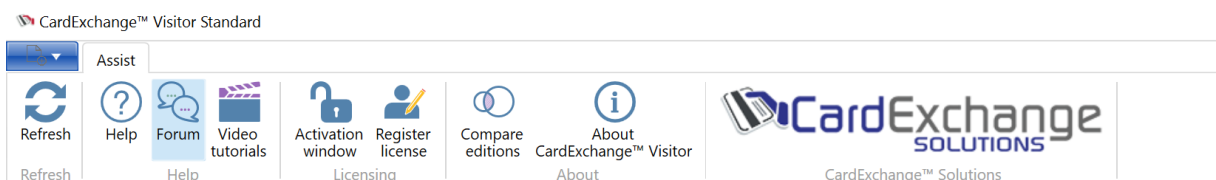
You have access to the online help file directly by clicking on the Help button indicated with in blue.



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.

6.2 Forum



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

CARDEXCHANGE™ FORUM SEARCH

Recent Posts Index Recent Topics Rules Search

Welcome, **Guest**
 Username: Password: Remember me ☐
[Forgot your password?](#) [Forgot your username?](#) [Create an account](#)

Forum Recent Posts

CardExchange™ Producer 9.3 Released
 01 Oct 2015
 CardExchange™ Producer 9.3 Features...at a Glance
 Ready to Go with Windows 10, IDP Smart Printer Contactless MIFARE® Classic Encoding Support, Updated Service Center Bringing you the Latest Important News, ...and more! ...
[Read More...](#)

57 Posts Month Board Categories Go Page: 1 2 3

Recent Posts

	FACTORY PASSWORD FOR CARD EXCH ...	FACTORY PASSWORD FOR CARD EXCHANGE VERSION 6 Category: General	Posted 23 hours 58 minutes ago by Craig Bechelli
	FACTORY PASSWORD FOR CARD EXCH ...	FACTORY PASSWORD FOR CARD EXCHANGE VERSION 6 Category: General	Posted 1 day 18 hours ago by KATHY BUMGARDNER
	Create a card with Expires: (D ...	Create a card with Expires: (Date) Category: Card objects and tools	Posted 1 day 23 hours ago by Craig Bechelli
	Create a card with Expires: (D ...	Create a card with Expires: (Date) Category: Card objects and tools	Posted 4 days 20 hours ago by Orrin
	Create a card with Expires: (D ...	Create a card with Expires: (Date) Category: Card objects and tools	Posted 4 days 20 hours ago by Craig Bechelli

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!

6.3 Video Tutorials

CardExchange™ Visitor Standard

Assist

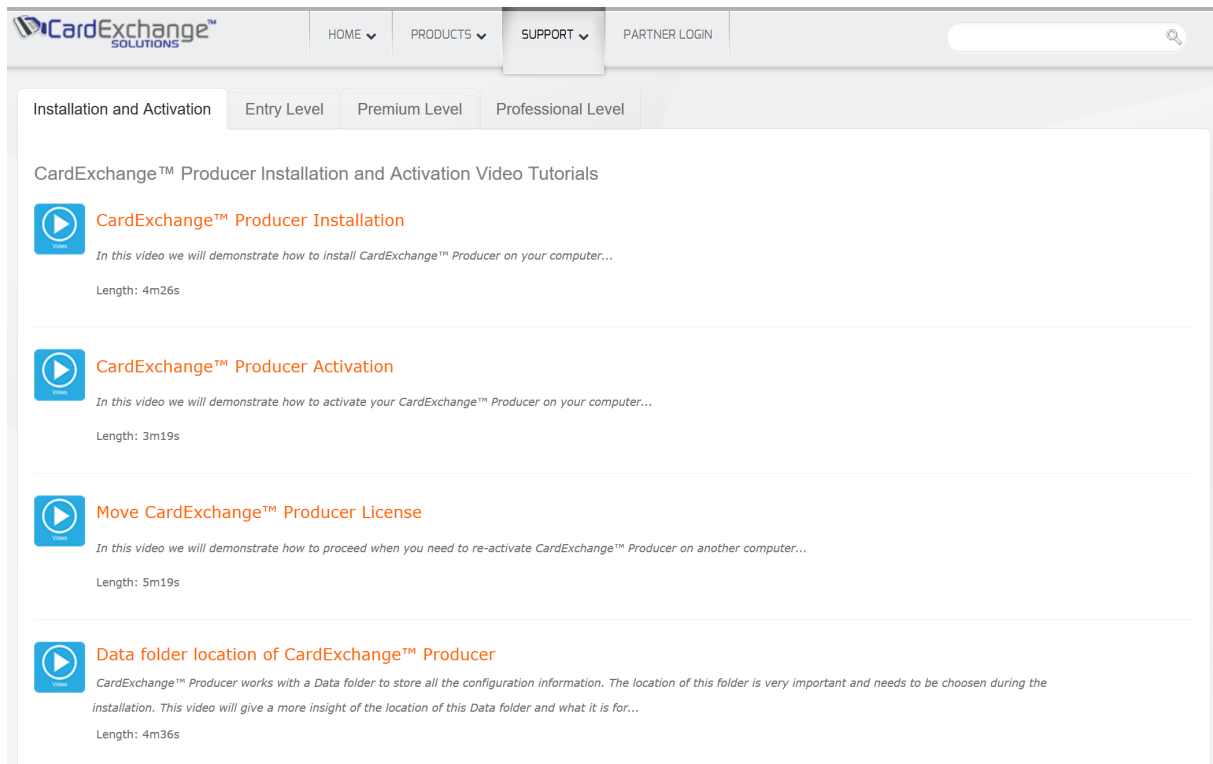
Refresh Help Forum Video tutorials Activation window Register license Compare editions About CardExchange™ Visitor

Refresh Help Licensing About

CardExchange SOLUTIONS
CardExchange™ Solutions

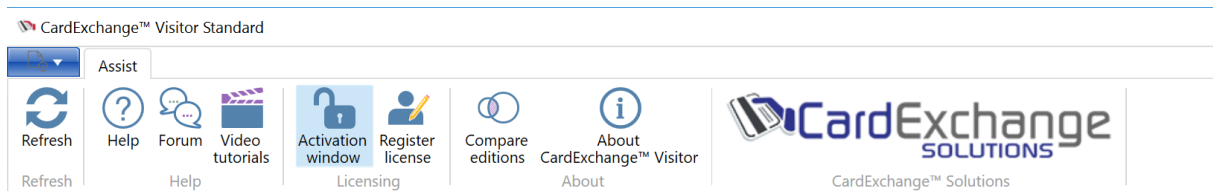
Sometimes it is handy to see how things are done in stead of reading text or other

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.**

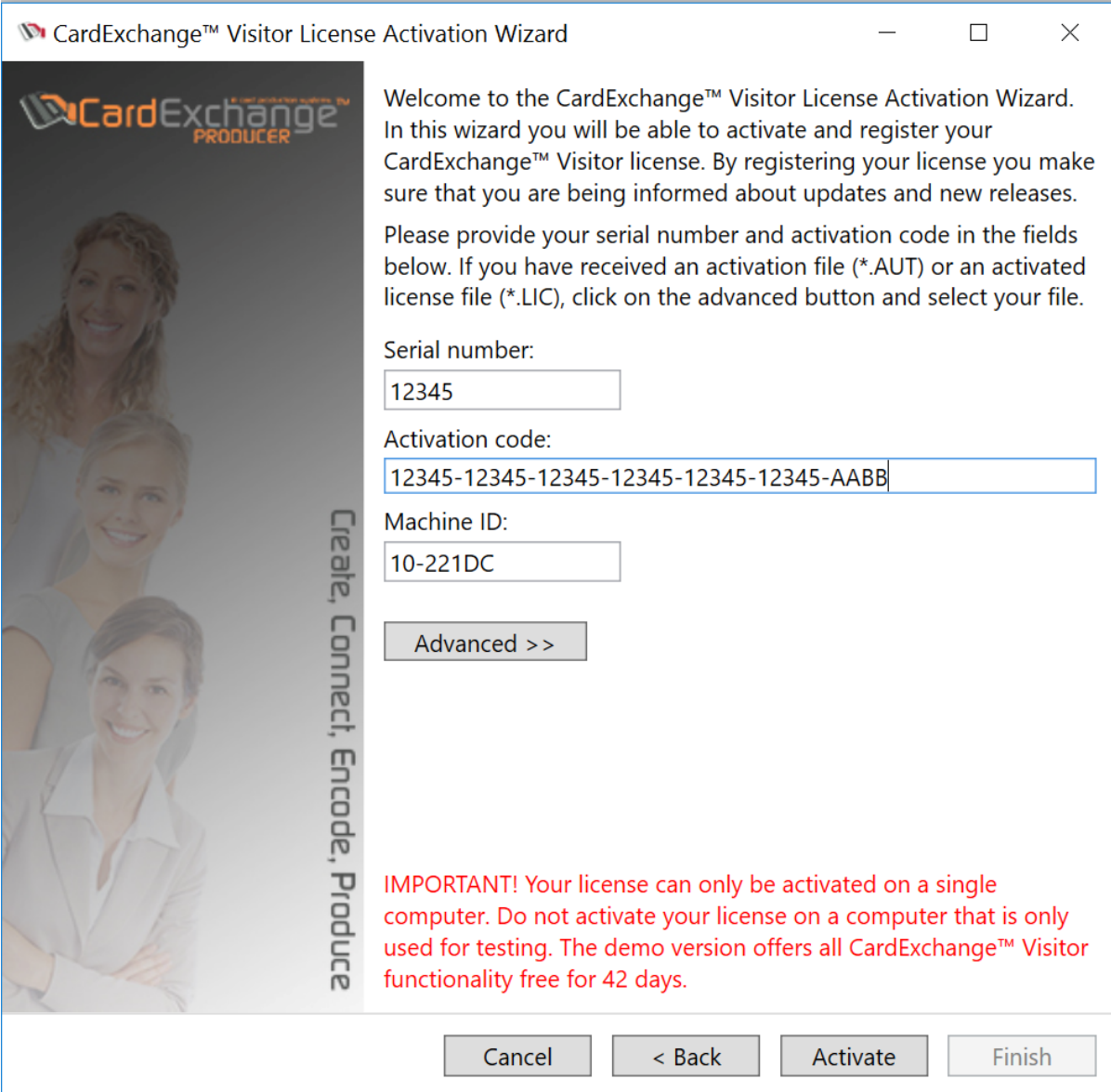
6.4 Upgrade Your License



In the section [Activation and Registration](#)¹⁵ 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.

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.



The image shows a software window titled "CardExchange™ Visitor License Activation Wizard". On the left is a vertical banner with the CardExchange PRODUCER logo and a photo of three women, with the text "Create, Connect, Encode, Produce" written vertically. The main area contains a welcome message, instructions, and input fields for "Serial number" (12345), "Activation code" (12345-12345-12345-12345-12345-AABB), and "Machine ID" (10-221DC). There is an "Advanced >>" button and a red warning message at the bottom. At the very bottom are "Cancel", "< Back", "Activate", and "Finish" buttons.

CardExchange™ Visitor License Activation Wizard

Welcome to the CardExchange™ Visitor License Activation Wizard. In this wizard you will be able to activate and register your CardExchange™ Visitor 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:

Activation code:

Machine ID:

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™ Visitor functionality free for 42 days.

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

CardExchange™ Visitor License Activation Wizard

It is recommended that you register your CardExchange™ Visitor 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™ Visitor license

Company name: CardExchange Solutions, Inc.

Contact person: CardExchange User

E-mail address: sales@cardexchangesolutions.com

Address: 201 Sand Creek Road, Suite H

ZIP code: 94513

City: Brentwood

Country: United States

Phone number: 925 529 4999

Fax number (optional):

Printer brand: Other

Company type: Other

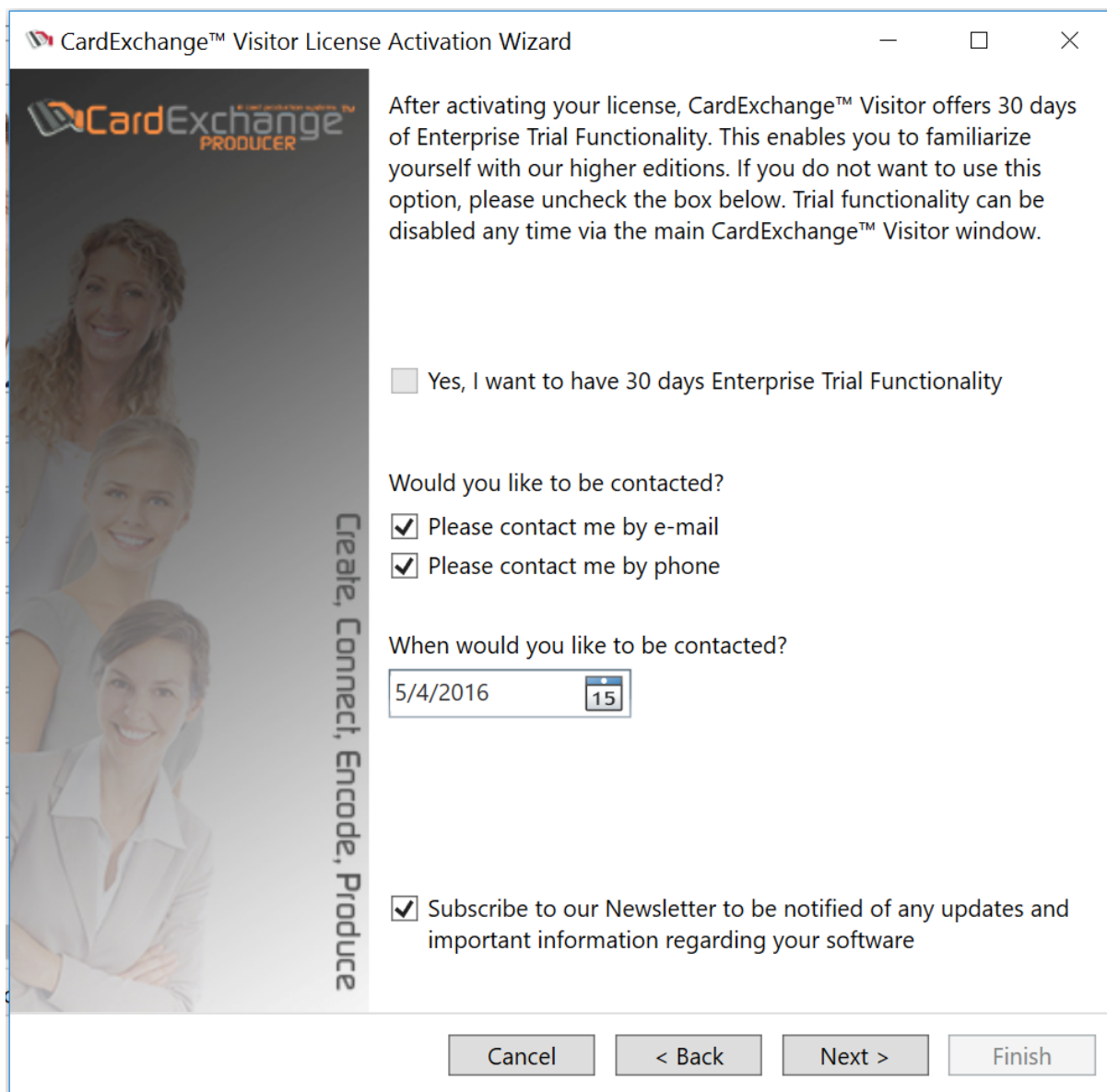
Preferred language: English

Alias for forum: Mr CardExchange User

Create, Connect, Encode, Produce

Cancel < Back Next > Finish

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



The image shows a software window titled "CardExchange™ Visitor License Activation Wizard". On the left is a vertical banner with the CardExchange logo and the text "PRODUCER" and "Create, Connect, Encode, Produce" next to three smiling women. The main area contains the following text: "After activating your license, CardExchange™ Visitor offers 30 days of Enterprise 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™ Visitor window." Below this is a checkbox labeled "Yes, I want to have 30 days Enterprise Trial Functionality" which is currently unchecked. Then, under the heading "Would you like to be contacted?", there are two checked checkboxes: "Please contact me by e-mail" and "Please contact me by phone". Below that, under the heading "When would you like to be contacted?", there is a date field showing "5/4/2016" and a calendar icon with the number "15" selected. At the bottom, there is a checked checkbox labeled "Subscribe to our Newsletter to be notified of any updates and important information regarding your software". At the very bottom are four buttons: "Cancel", "< Back", "Next >", and "Finish".

CardExchange™ Visitor License Activation Wizard

After activating your license, CardExchange™ Visitor offers 30 days of Enterprise 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™ Visitor window.

☐ Yes, I want to have 30 days Enterprise 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?

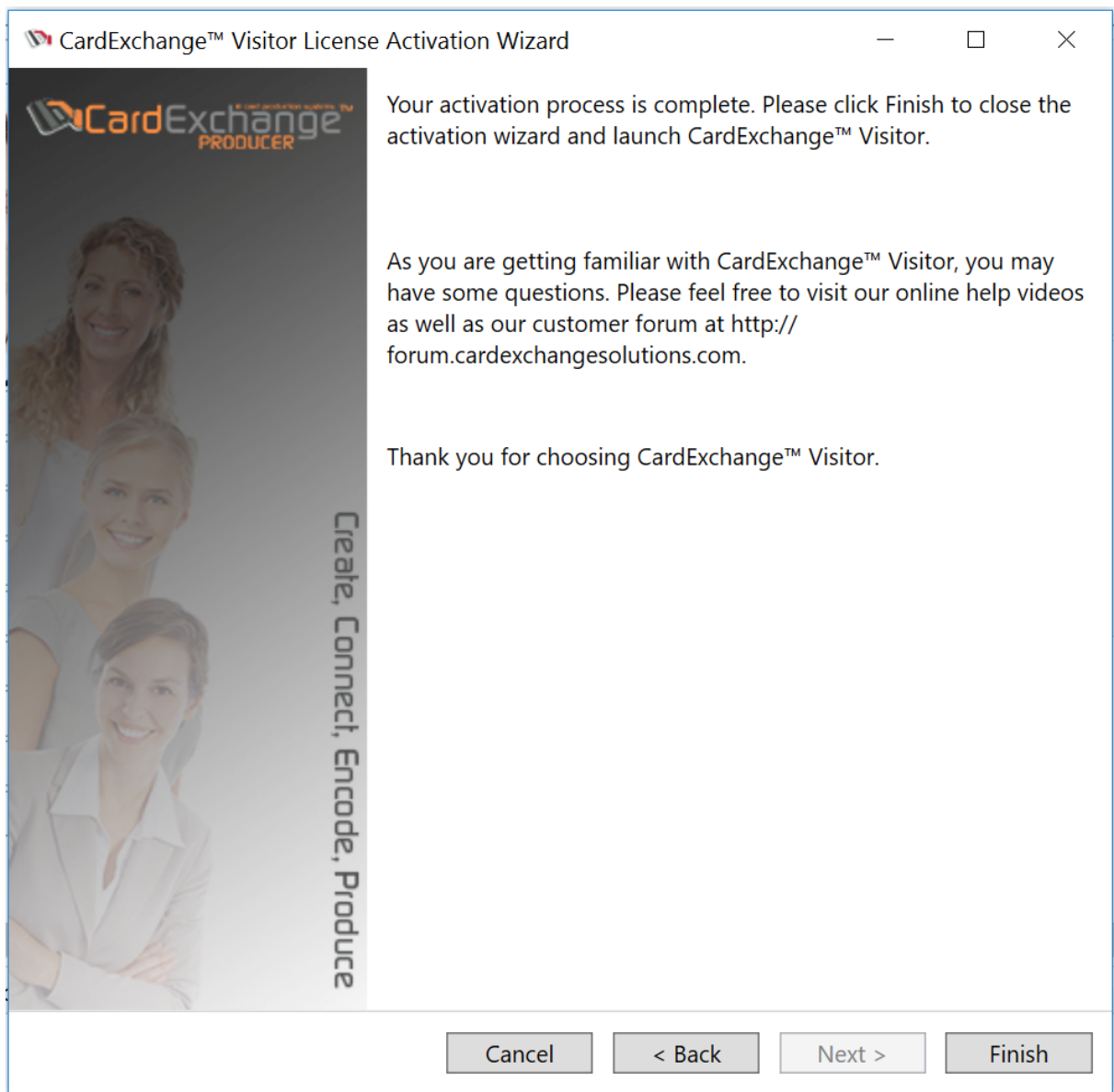
5/4/2016 15

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

Cancel < Back Next > Finish

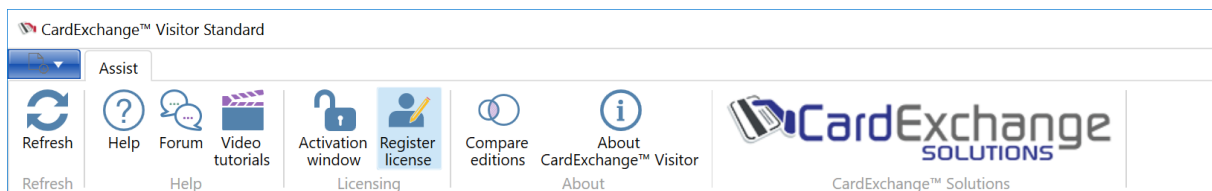
If you would like to be contacted, just select how and when, and your reseller will contact you on the preferred date selected. You can also change your subscription to our newsletter.

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

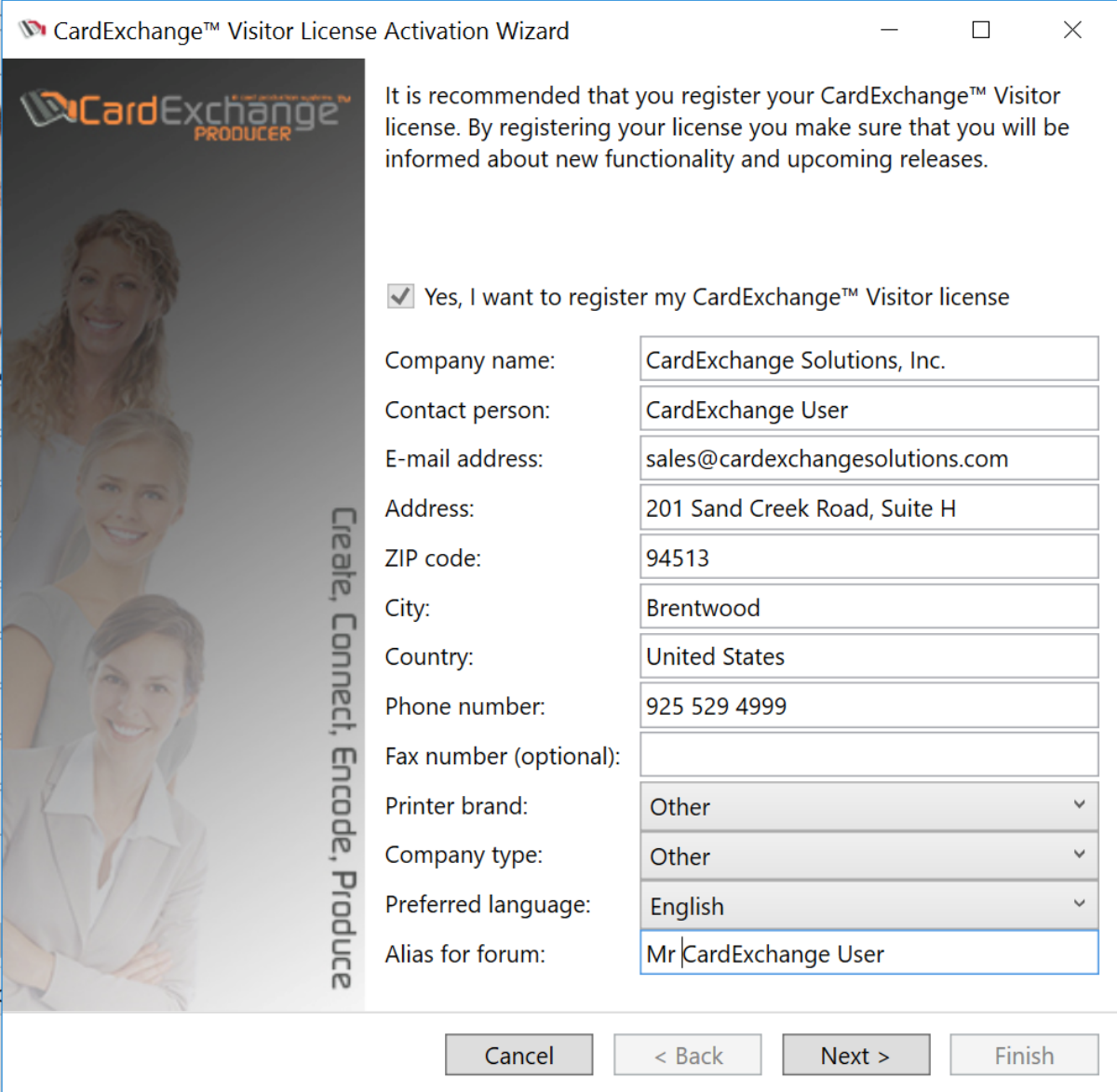


When you click on **Finish**, the dialog below will pop up prompting you to restart. Click on **OK** to confirm and restart CardExchange® Visitor.

6.5 Update Your Registration Info



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.



The image shows a screenshot of the 'CardExchange™ Visitor License Activation Wizard' window. The window has a title bar with the text 'CardExchange™ Visitor License Activation Wizard' and standard window controls (minimize, maximize, close). On the left side, there is a vertical banner with the CardExchange logo and the text 'PRODUCER' and 'Create, Connect, Encode, Produce'. The main area of the window contains a message: 'It is recommended that you register your CardExchange™ Visitor 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™ Visitor license', which is checked. To the right of the checkbox is a form with several fields: 'Company name:' (CardExchange Solutions, Inc.), 'Contact person:' (CardExchange User), 'E-mail address:' (sales@cardexchangesolutions.com), 'Address:' (201 Sand Creek Road, Suite H), 'ZIP code:' (94513), 'City:' (Brentwood), 'Country:' (United States), 'Phone number:' (925 529 4999), 'Fax number (optional):' (empty), 'Printer brand:' (Other), 'Company type:' (Other), 'Preferred language:' (English), and 'Alias for forum:' (Mr CardExchange User). At the bottom of the window are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

CardExchange™ Visitor License Activation Wizard

It is recommended that you register your CardExchange™ Visitor 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™ Visitor license

Company name: CardExchange Solutions, Inc.

Contact person: CardExchange User

E-mail address: sales@cardexchangesolutions.com

Address: 201 Sand Creek Road, Suite H

ZIP code: 94513

City: Brentwood

Country: United States

Phone number: 925 529 4999

Fax number (optional):

Printer brand: Other

Company type: Other

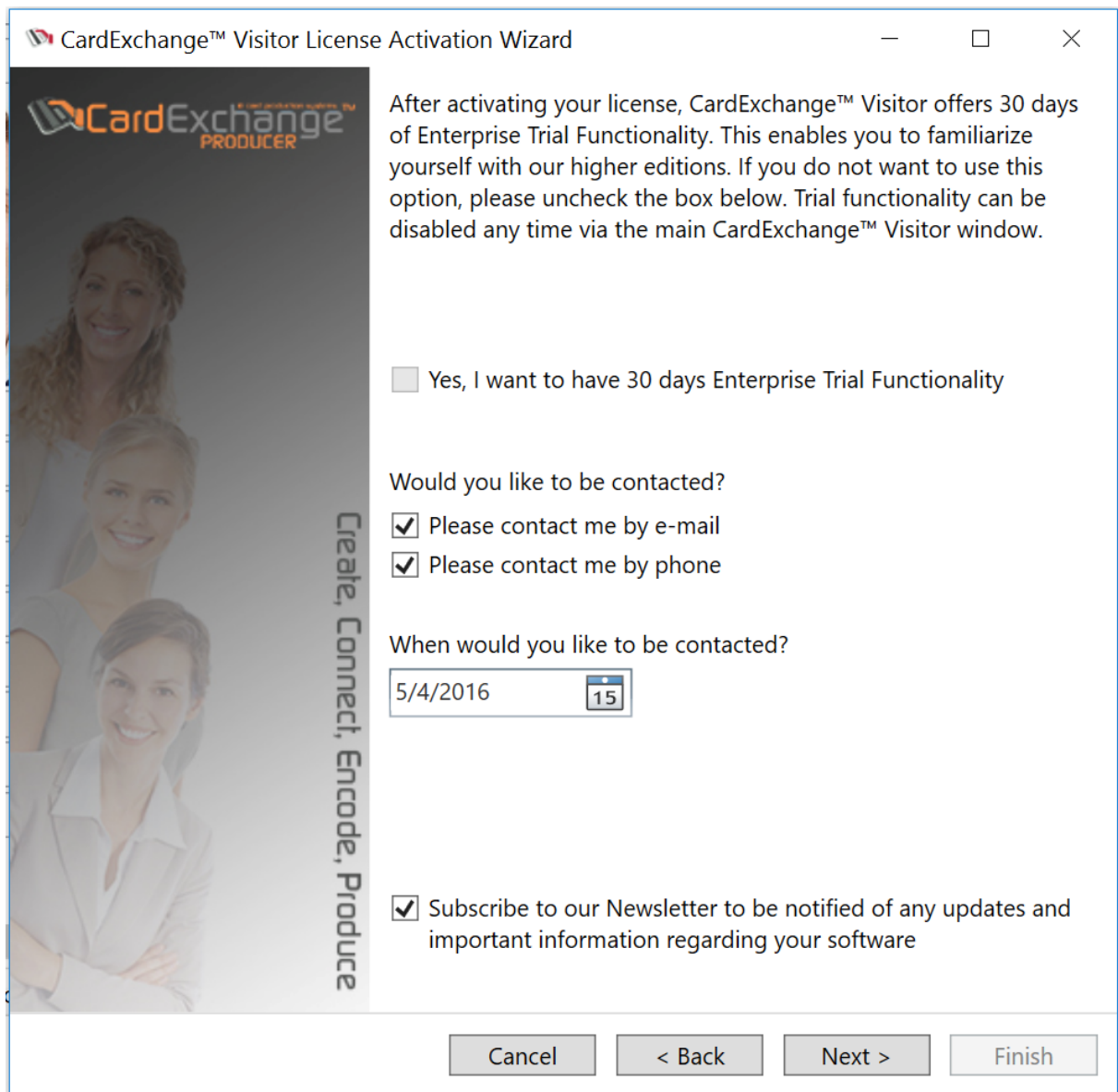
Preferred language: English

Alias for forum: Mr CardExchange User

Cancel < Back Next > Finish

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.



The image shows a software window titled "CardExchange™ Visitor License Activation Wizard". On the left is a vertical banner with the CardExchange logo and the text "PRODUCER" and "Create, Connect, Encode, Produce" next to a photo of three women. The main area contains the following text: "After activating your license, CardExchange™ Visitor offers 30 days of Enterprise 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™ Visitor window." Below this is a checkbox labeled "Yes, I want to have 30 days Enterprise Trial Functionality". Then, under the heading "Would you like to be contacted?", there are two checked checkboxes: "Please contact me by e-mail" and "Please contact me by phone". Under the heading "When would you like to be contacted?", there is a date field showing "5/4/2016" and a calendar icon with "15" selected. At the bottom, there is a checked checkbox labeled "Subscribe to our Newsletter to be notified of any updates and important information regarding your software". At the very bottom are four buttons: "Cancel", "< Back", "Next >", and "Finish".

CardExchange™ Visitor License Activation Wizard

After activating your license, CardExchange™ Visitor offers 30 days of Enterprise 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™ Visitor window.

☐ Yes, I want to have 30 days Enterprise 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?

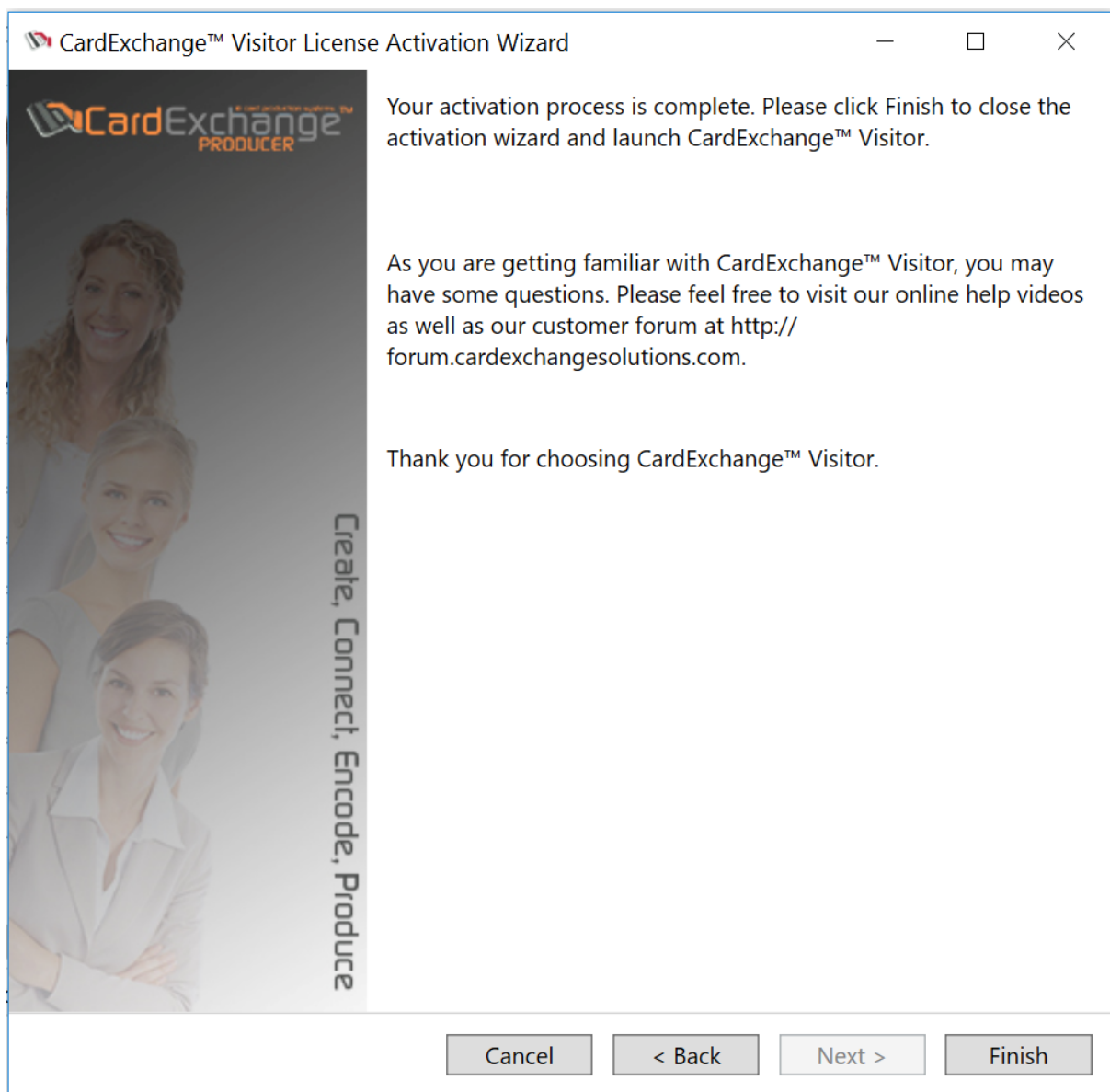
5/4/2016 15

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

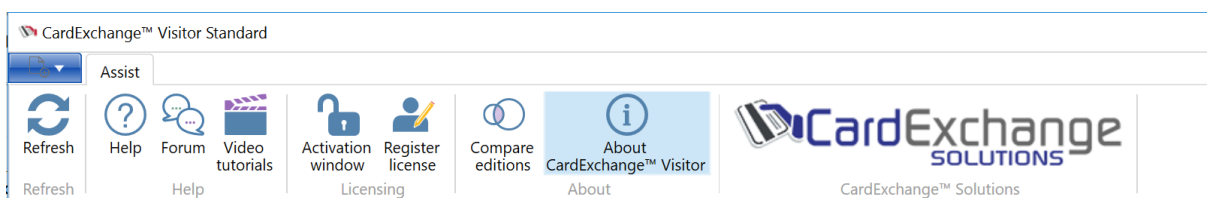
Cancel < Back Next > Finish

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.

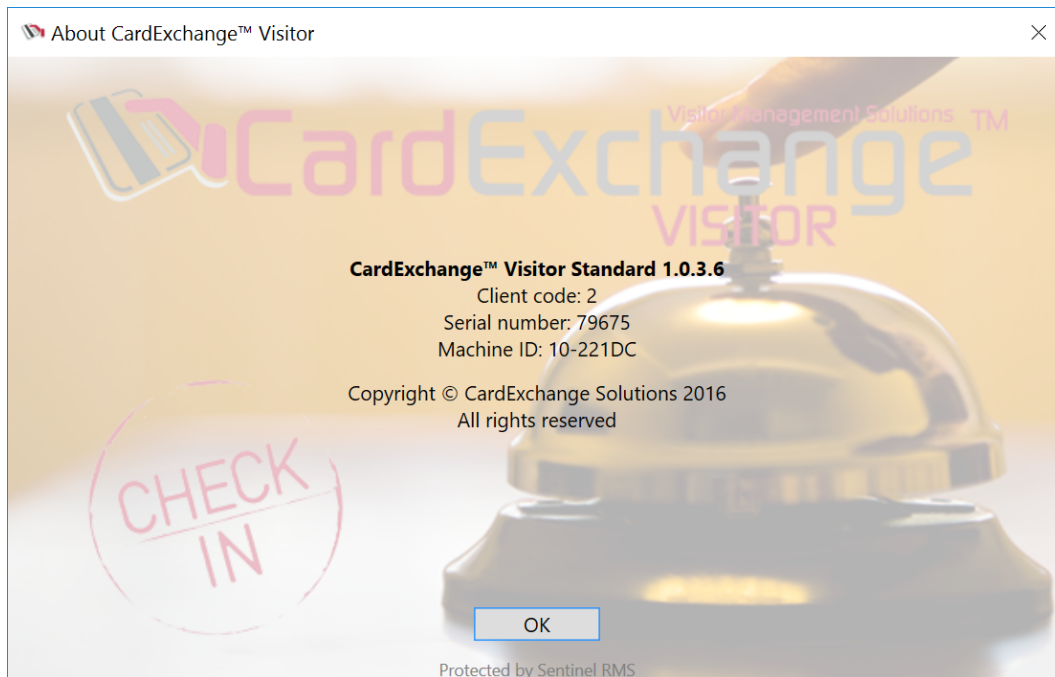


6.6 About CardExchange™ Visitor



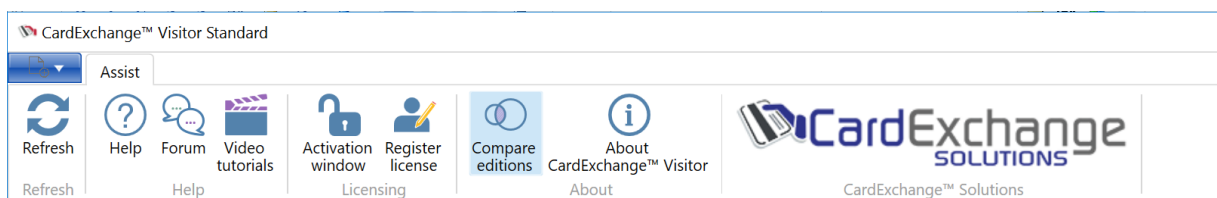
Sometimes when you need support you will be asked which edition and version you are running of CardExchange® Visitor. All this type of information can be found in the **About**

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 not 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:

The screenshot shows the CardExchange Solutions website. At the top, there are navigation links: HOME, PRODUCTS, SUPPORT, and PARTNER LOGIN. Below these are six product cards: Brochure, GO, Premium, Professional, Ultimate, and Compare. Each card has a description of its features. Below the cards is a table titled 'CardExchange™ Producer Edition Features' comparing the GO, Premium, Professional, and Ultimate editions across five categories: License via Activation, Online Service Center, Template Migration Tool, Online and Offline Help, and FREE End-User Support Forum. All editions have a green checkmark in all categories.

CardExchange™ Producer Edition Features	GO	Premium	Professional	Ultimate
Service and Support				
License via Activation	✓	✓	✓	✓
Online Service Center	✓	✓	✓	✓
Template Migration Tool	✓	✓	✓	✓
Online and Offline Help	✓	✓	✓	✓
FREE End-User Support Forum	✓	✓	✓	✓

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

6.7 Contact Information

The screenshot shows the CardExchange Visitor Standard software interface. At the top, there is a title bar 'CardExchange™ Visitor Standard'. Below it is a menu bar with 'Assist'. Under the 'Assist' menu, there are several icons and labels: Refresh, Help, Forum, Video tutorials, Activation window, Register license, Compare editions, About CardExchange™ Visitor, and a large CardExchange Solutions logo. The labels below the icons are: Refresh, Help, Licensing, and About.

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.

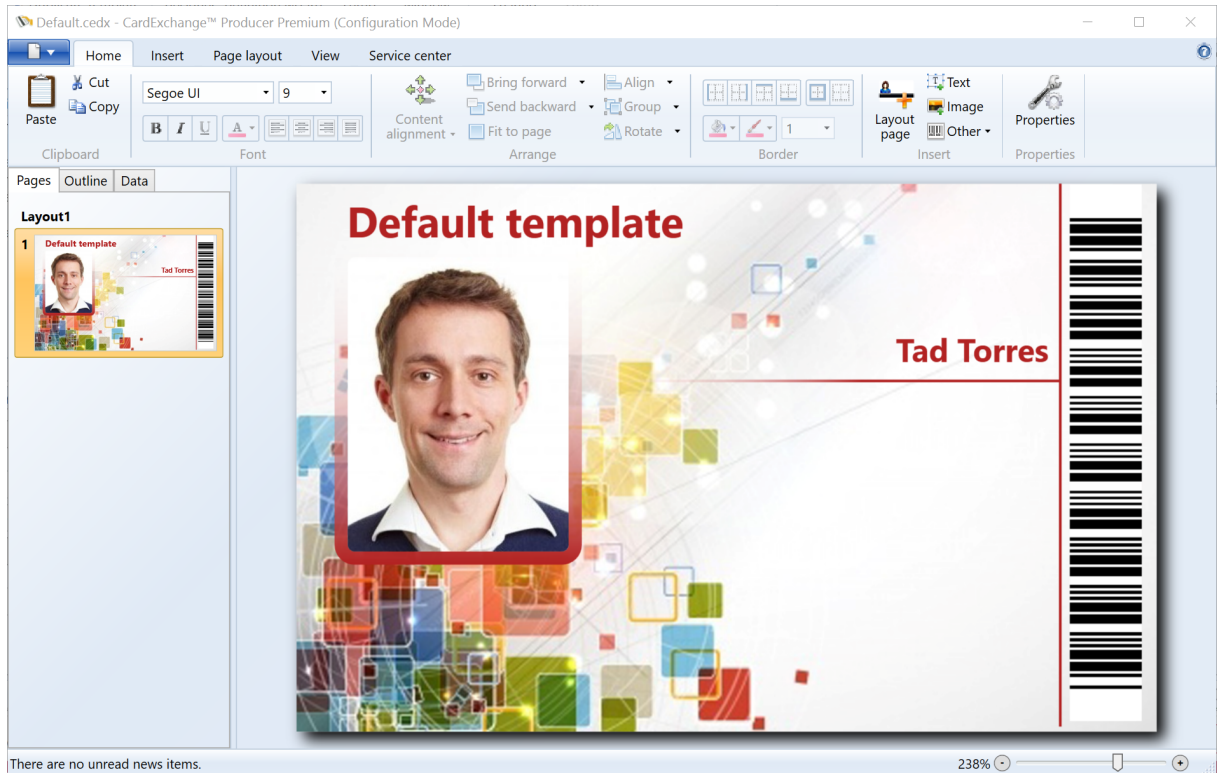
When applicable, in the same section you can find a second button, that will take you

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.

7 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.

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®.

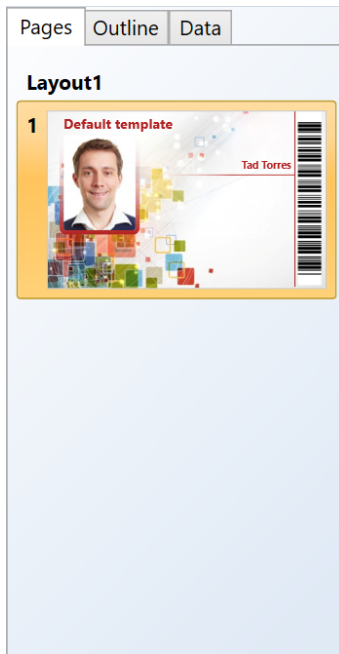
CardExchange® Visitor Edition CardExchange® Producer Designer Features

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](#).

7.1 Explorer Menu

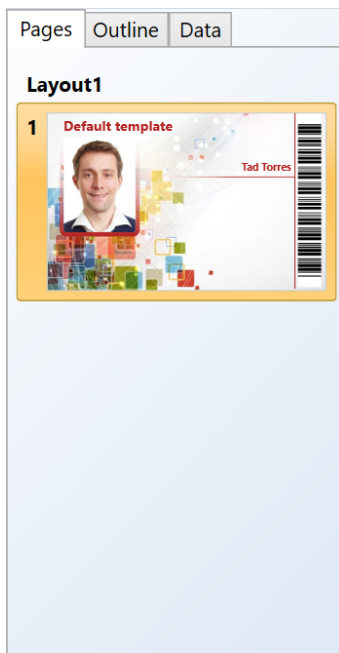


Just like in the [Main Interface](#)^[22], the Card Designer also contains an Explorer menu. Also here the Explorer Menu is based on the Explorer Menu as it is available in Microsoft® PowerPoint.

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.

7.1.1 Pages

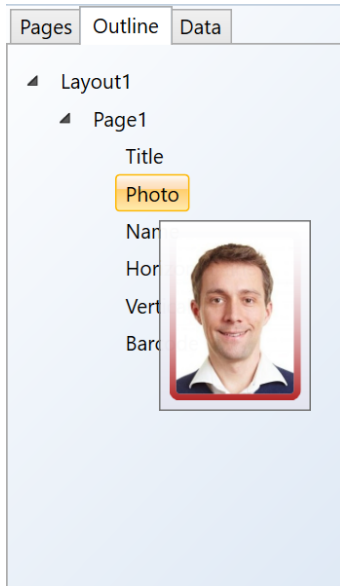


When selecting the Page tab (default) all available and created Layouts and the available pages per layout are shown.

Simply click on the page or the layout header to select. Specific settings for the available Layouts can found in the [Page Setup](#)^[178] section of this Help file.

How to [Add Layouts](#)^[240] and [Pages](#)^[240] can be found in these specific sections.

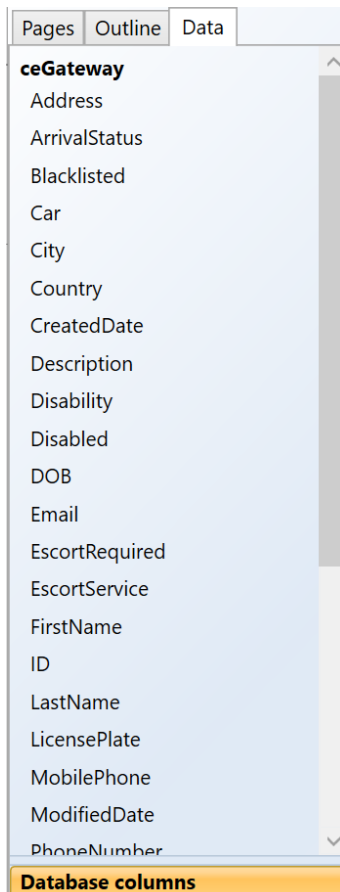
7.1.2 Outline



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.

7.1.3 Data

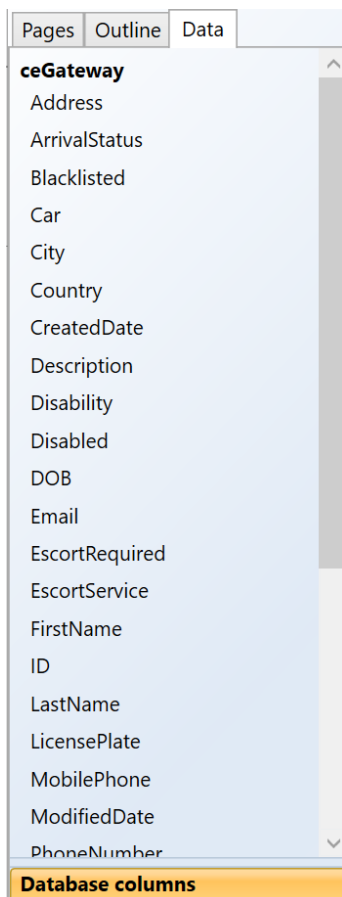


The Data tab is offering, depending on the edition used, four sub tabs:

- [Database columns](#) ¹⁷³
- [Manual Entries](#) ¹⁷⁴
- [Variables](#) ²⁰²

Not all tabs are available in every edition.

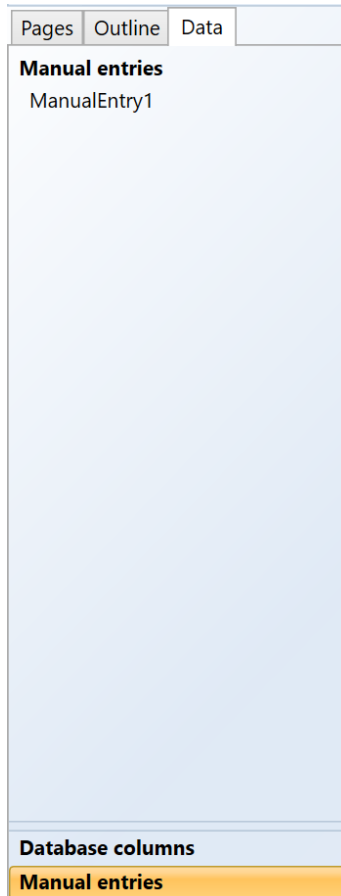
7.1.3.1 Database Columns



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](#) ²⁰² window.

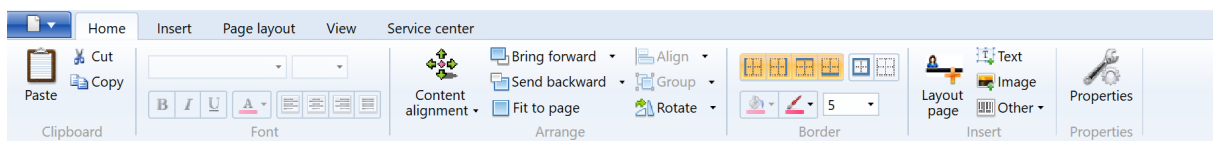
7.1.3.2 Manual Entries



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](#)²²⁹ section of this Help file for more information about creating and configuring Manual Entries.

7.2 Ribbon Overview



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

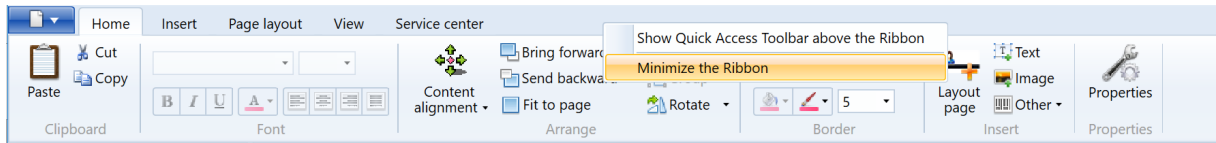
Clipboard functionality for easy Copy, Cut, and Pasting. In the Font group you can easily set the font type, size, color, and outline the text.

CardExchange® Producer offers almost unlimited possibilities to outline your text and objects. Also borders can be easily set and colors can be chosen.

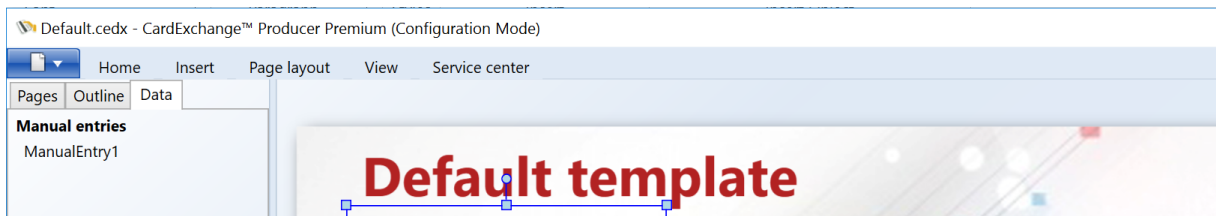
The main objects for inserting are also available from the Home tab in the Insert group. Last but not least, the [Properties](#)²⁰² window is called from the Home tab too.

It is also possible to minimize the ribbon if you need more space on your design because

you are using a smaller screen.



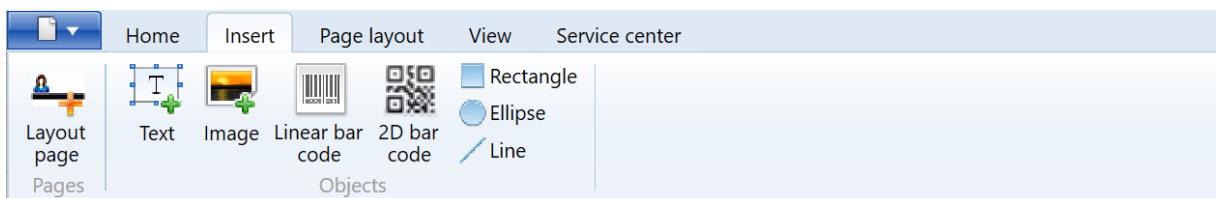
Right mouse click on one of the available tabs to open the context menu and select **Minimize the Ribbon**.



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.

7.2.1 Insert



Just like in the Home tab, objects can be selected here.

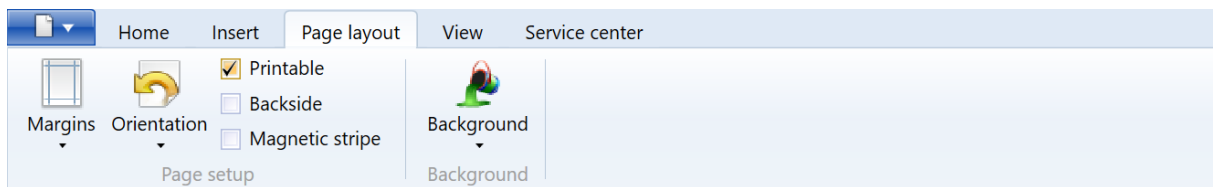
When running a Professional or higher edition, it is also possible to add an extra Layout which needs to be selected here. When using multiple layouts you can set a condition for each layout to be automatically shown based on the value of a database column.

Via the Insert tab you can insert the following objects:

- [Text](#)²⁴²
- [Images](#)²⁴³
- [1D Barcodes](#)²⁵¹
- [2D Barcodes](#)²⁵²
- [Rectangles](#)²⁵⁵
- [Ellipses](#)²⁵⁵
- [Lines](#)²⁵⁵

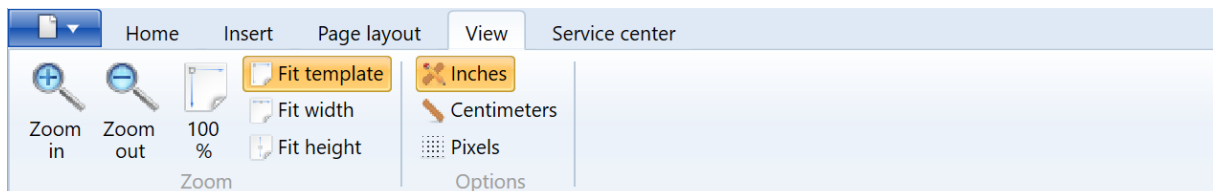
IMPORTANT! The Layout button is not available in the Go and Premium Edition. Multiple Layouts are supported from Professional and higher.

7.2.2 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](#)¹⁷⁸" section from this Help file. More information about how to use Backgrounds, please refer to our "[Using Backgrounds](#)²⁴⁸" section of our Help file.

7.2.3 View

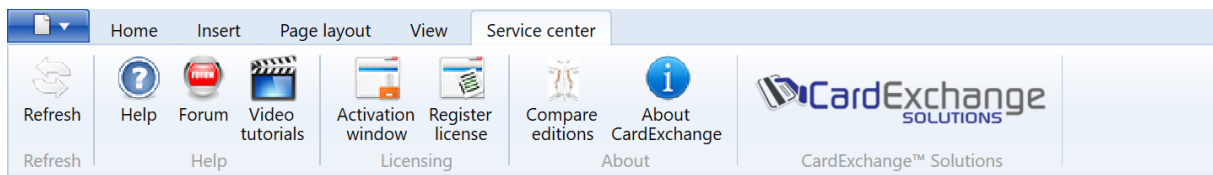


When the View tab is selected, you find two different groups:

Group	Function(s)	Description
-------	-------------	-------------

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

7.2.4 Service Center

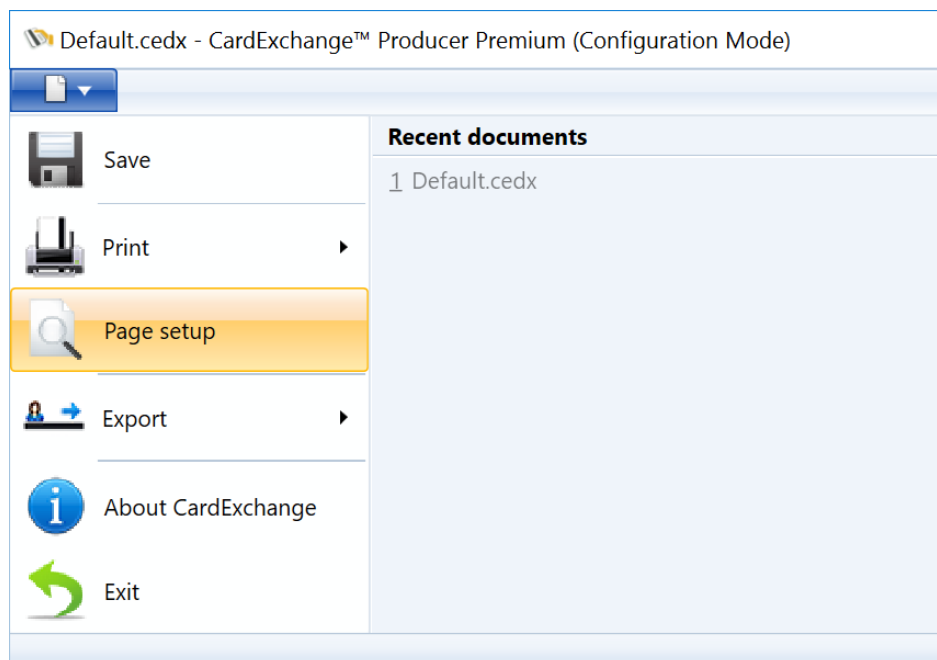



The Service Center tab is organized in different groups with specific functionality. This is the same as for the Assist tab in the main interface but this time focused around CardExchange® Producer Designer.

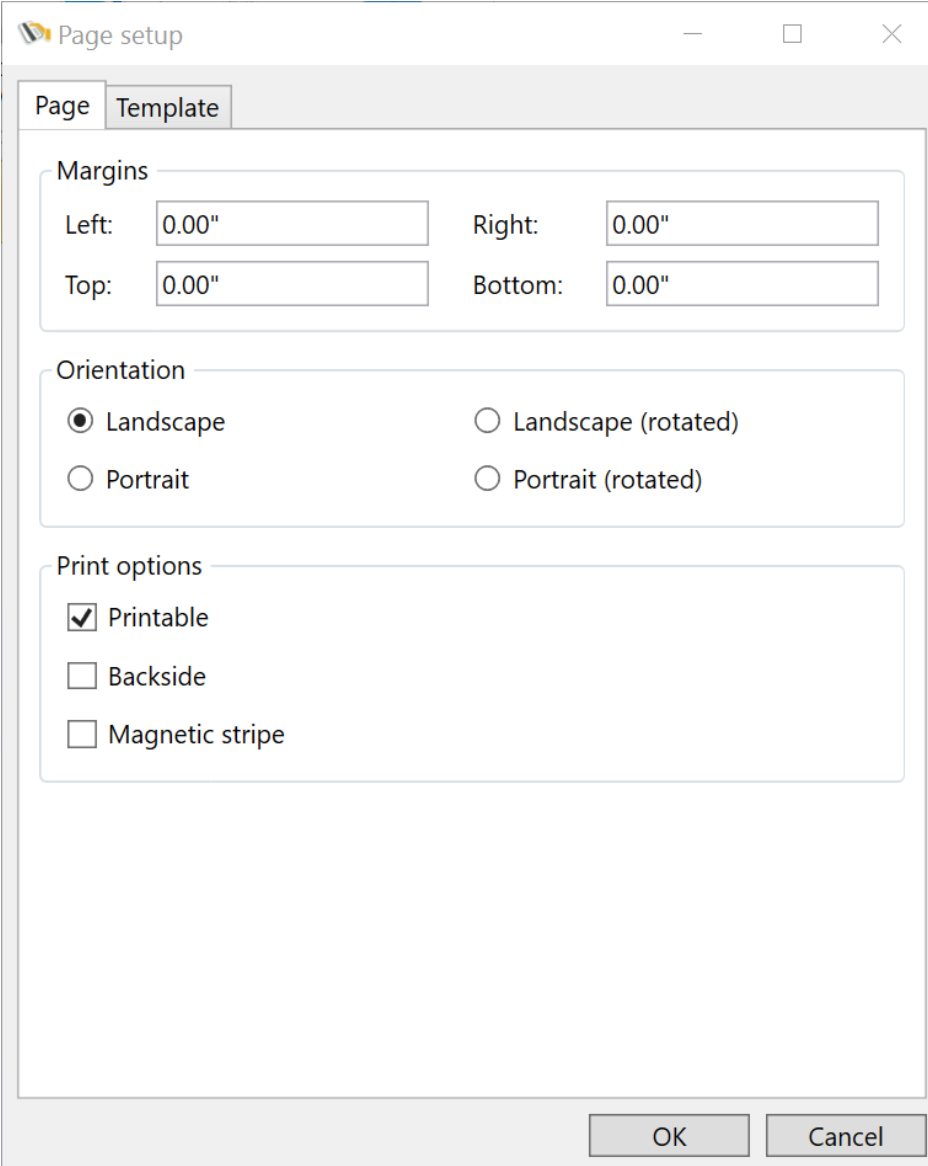
Group	Function(s)	Description
Refresh	Refresh	Refreshes the available news items
Help	Help	Opens this online help file
	Forum	Opens our FREE End-User Support Forum
	Video Tutorials	Opens our website at the How-To Video section
Licensing	Activation Window ¹⁵¹	Opens the Activation Wizard window
	Register License ¹⁵¹	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](#) ¹⁵⁵" section of this Help file...

7.3 Page Setup



To start the Page Setup window, click on the Page Setup button in the [Main Menu](#)  201.



The image shows a 'Page setup' dialog box with a title bar containing a printer icon, the text 'Page setup', and standard window controls (minimize, maximize, close). The dialog has two tabs: 'Page' (selected) and 'Template'. The 'Page' tab contains three sections: 'Margins', 'Orientation', and 'Print options'. The 'Margins' section has four text input fields: 'Left: 0.00"', 'Right: 0.00"', 'Top: 0.00"', and 'Bottom: 0.00"'. The 'Orientation' section has four radio button options: 'Landscape' (selected), 'Landscape (rotated)', 'Portrait', and 'Portrait (rotated)'. The 'Print options' section has three checkboxes: 'Printable' (checked), 'Backside', and 'Magnetic stripe'. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

Page setup

Page Template

Margins

Left: 0.00" Right: 0.00"

Top: 0.00" Bottom: 0.00"

Orientation

☒ Landscape ☐ Landscape (rotated)

☐ Portrait ☐ Portrait (rotated)

Print options

☒ Printable

☐ Backside

☐ Magnetic stripe

OK Cancel

7.3.1 Page

The screenshot shows a 'Page setup' dialog box with the following settings:

- Margins:** Left: 0.00", Right: 0.00", Top: 0.00", Bottom: 0.00"
- Orientation:** Landscape (selected), Landscape (rotated), Portrait, Portrait (rotated)
- Print options:** Printable (checked), Backside, Magnetic stripe

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

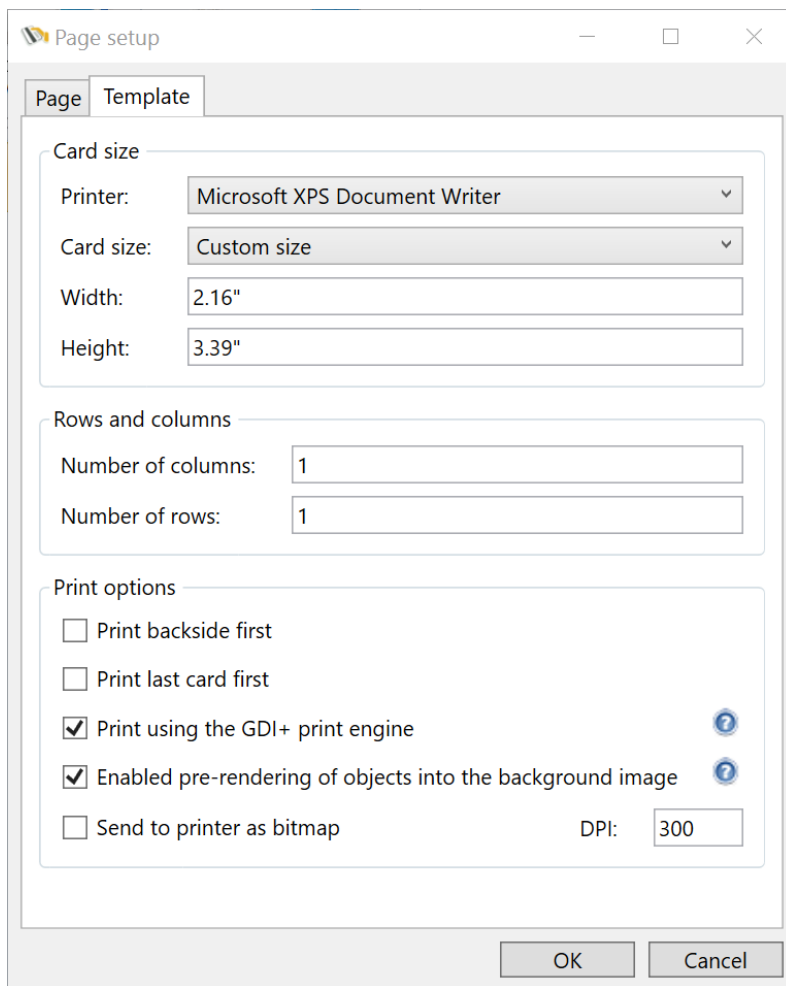
- Change the orientation for landscape or portrait

Print options

- Set the print options for the layout

- 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

7.3.2 Template



The screenshot shows the 'Page setup' dialog box with the 'Template' tab selected. The 'Card size' section includes a 'Printer' dropdown set to 'Microsoft XPS Document Writer', a 'Card size' dropdown set to 'Custom size', and input fields for 'Width' (2.16") and 'Height' (3.39"). The 'Rows and columns' section has input fields for 'Number of columns' (1) and 'Number of rows' (1). The 'Print options' section contains five checkboxes: 'Print backside first' (unchecked), 'Print last card first' (unchecked), 'Print using the GDI+ print engine' (checked), 'Enabled pre-rendering of objects into the background image' (checked), and 'Send to printer as bitmap' (unchecked). A 'DPI' input field is set to 300. The dialog has 'OK' and 'Cancel' buttons at the bottom.

Every Card (Template) designed with CardExchange® Producer can contain multiple layouts and multiple pages. Each [Layout](#)²³⁷ and [Page](#)²⁴⁰ 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.;

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](#)¹⁹⁸.

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](#)¹⁸².
- Enabled pre-rendering of objects into the background image - For more information [CLICK HERE](#)¹⁸³.
- 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

7.3.2.1 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. 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](#)¹⁸³ 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"

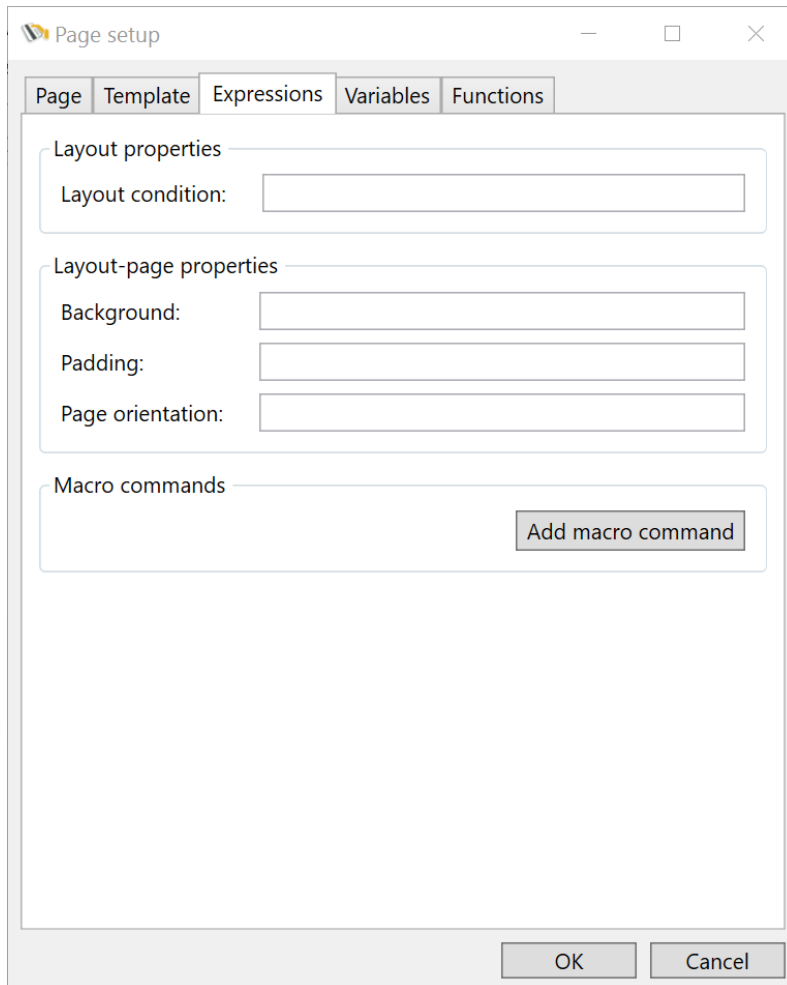
7.3.2.2 Pre-rendering of Objects

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](#)²²³ 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.

7.3.3 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.

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, '#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. The 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 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

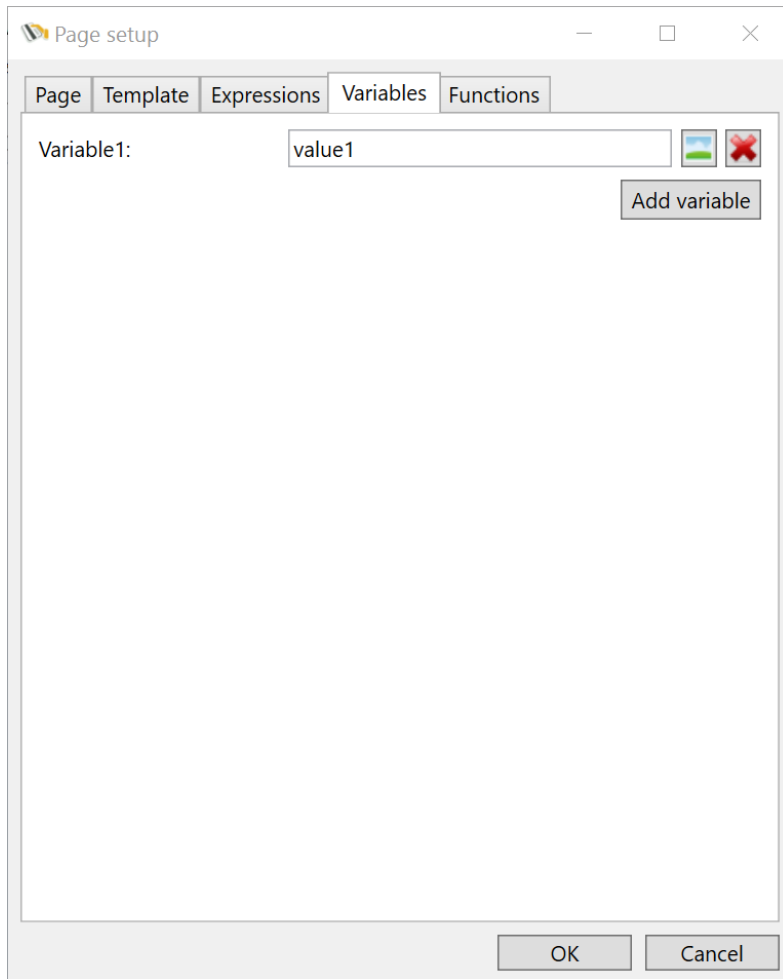
For the page orientation, it is still more unlikely that you want to control it with an expression. The value that the expression should return are 'Landscape', 'Portrait', 'ReverseLandscape' or 'ReversePortrait', where the last two refer to an orientation that has been rotated 180 degrees.

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.

7.3.4 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.

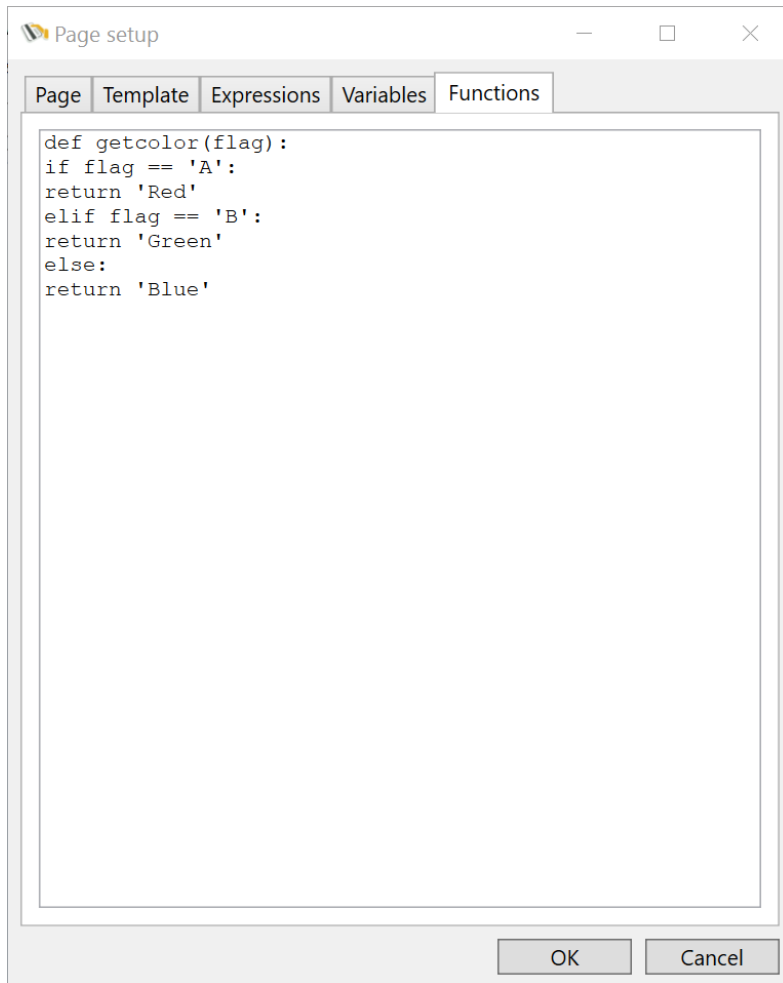
- Changing the default value of a variable by typing in the value box.
- Removing a variable by clicking on the button with the red cross. You should only do this if you are sure that the variable is not being used by any expressions.
- Adding a new variable by clicking on the Add-variable button.

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.

7.3.5 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'
```

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

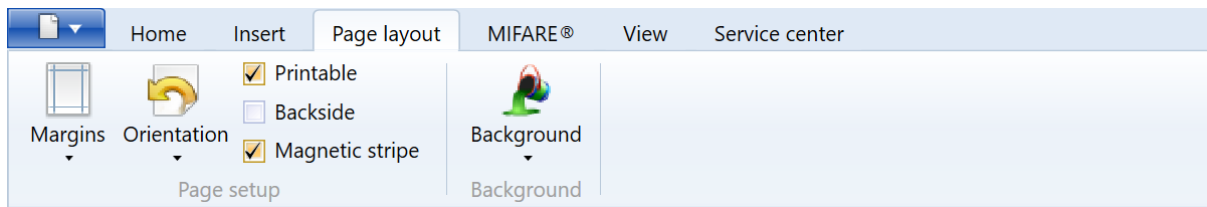
def namecase(s):
    return re.sub("\w+", capitalizematch, s)

def capitalizematch(m):
    return capitalize(m.group(0))

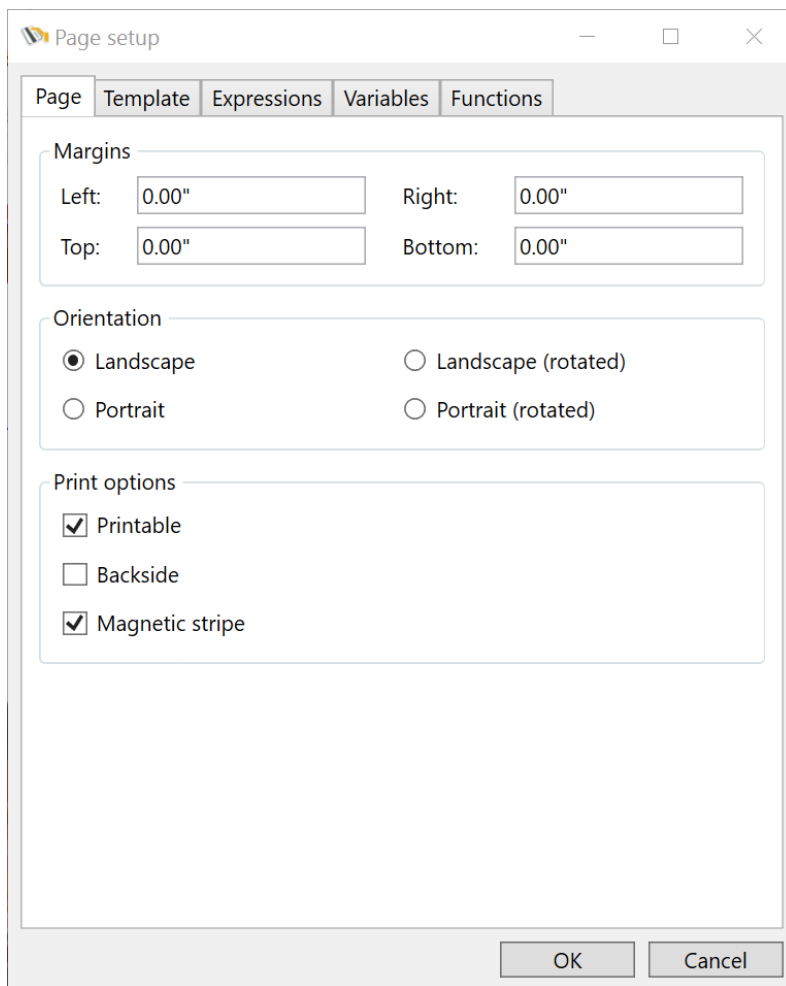
def capitalize(s):
    if len(s) > 1:
        return s[:1].upper() + s[1:].lower()
    elif len(s) == 1:
        return s.upper()
    else:
        return s
```

With the name-case function, you can convert a string like 'jOHn SMith' into 'John Smith'.

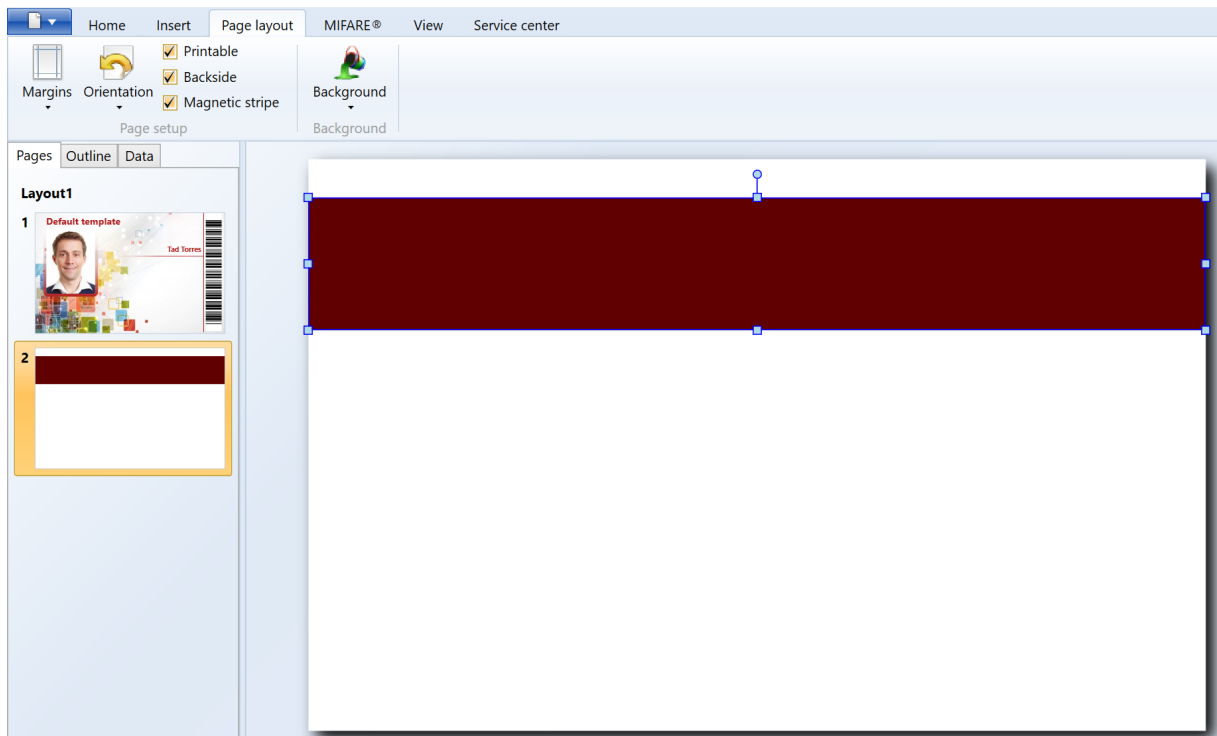
7.4 Magnetic Encoding



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.



In the Page design you now see a red magnetic stripe rectangle appearing as indicated. Now make sure that you have the [Properties](#)²⁰² window open and make sure the [Content](#)²⁰⁴ tab is selected and that the magnetic area on your page design is selected.

The screenshot shows a software window titled 'Properties' with a tabbed interface. The tabs are 'Database columns', 'Manual entries', 'Expressions', 'Variables', and 'Functions'. The 'Manual entries' tab is selected, and within it, the 'Content' sub-tab is active. The window is divided into three main sections, each highlighted with a colored border: a red border for 'Magnetic encoding', an orange border for 'Track 1, Track 2, and Track 3', and a blue border for 'Start and stop sentinels'. The 'Magnetic encoding' section contains three checked checkboxes for 'Track 1', 'Track 2', and 'Track 3', each followed by a text input field containing 'Phil', '2', and '1234567890' respectively. The 'Track 1, Track 2, and Track 3' section contains three collapsed dropdown menus labeled 'Track 1:', 'Track 2:', and 'Track 3:'. The 'Start and stop sentinels' section includes a 'Printer:' dropdown menu set to 'Microsoft XPS Document Writer' with an 'Apply defaults' button, and three rows of input fields for 'Track 1:', 'Track 2:', and 'Track 3:', each with a percentage or number followed by a semicolon and a question mark. A 'Close' button is located at the bottom right of the window.

Database columns	Manual entries	Expressions	Variables	Functions	
Content	Position	Text	Border	Colors	Visibility

Magnetic encoding

☒ Track 1: Phil

☒ Track 2: 2

☒ Track 3: 1234567890

▼ Track 1:

▼ Track 2:

▼ Track 3:

Start and stop sentinels

Printer: Microsoft XPS Document Writer ▼

Track 1: ~1% ?

Track 2: ~2; ?

Track 3: ~3; ?


In the Properties window you now see three sections:

- Magnetic encoding
- Track 1, Track 2, and Track 3
- Start and stop sentinels

Magnetic encoding

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.

Database columns	Manual entries	Expressions	Variables	Functions	
Content	Position	Text	Border	Colors	Visibility

Magnetic encoding

☒ Track 1: Phil

☒ Track 2: 2

☒ Track 3: 1234567890

Track 1:

FirstName

Formatting options

Letter case: Maintain original

Prefix: ☐ Always visible

Suffix: ☐ Always visible

Format: None ?

Concatenate

Track 2:

Track 3:

Start and stop sentinels

Printer: Microsoft XPS Document Writer

Track 1: ~1% ?

Just like with normal objects, with the Magnetic Encoding you can also use the [Standard Object Types](#) ²⁵⁸ to connect.

Start and stop sentinels

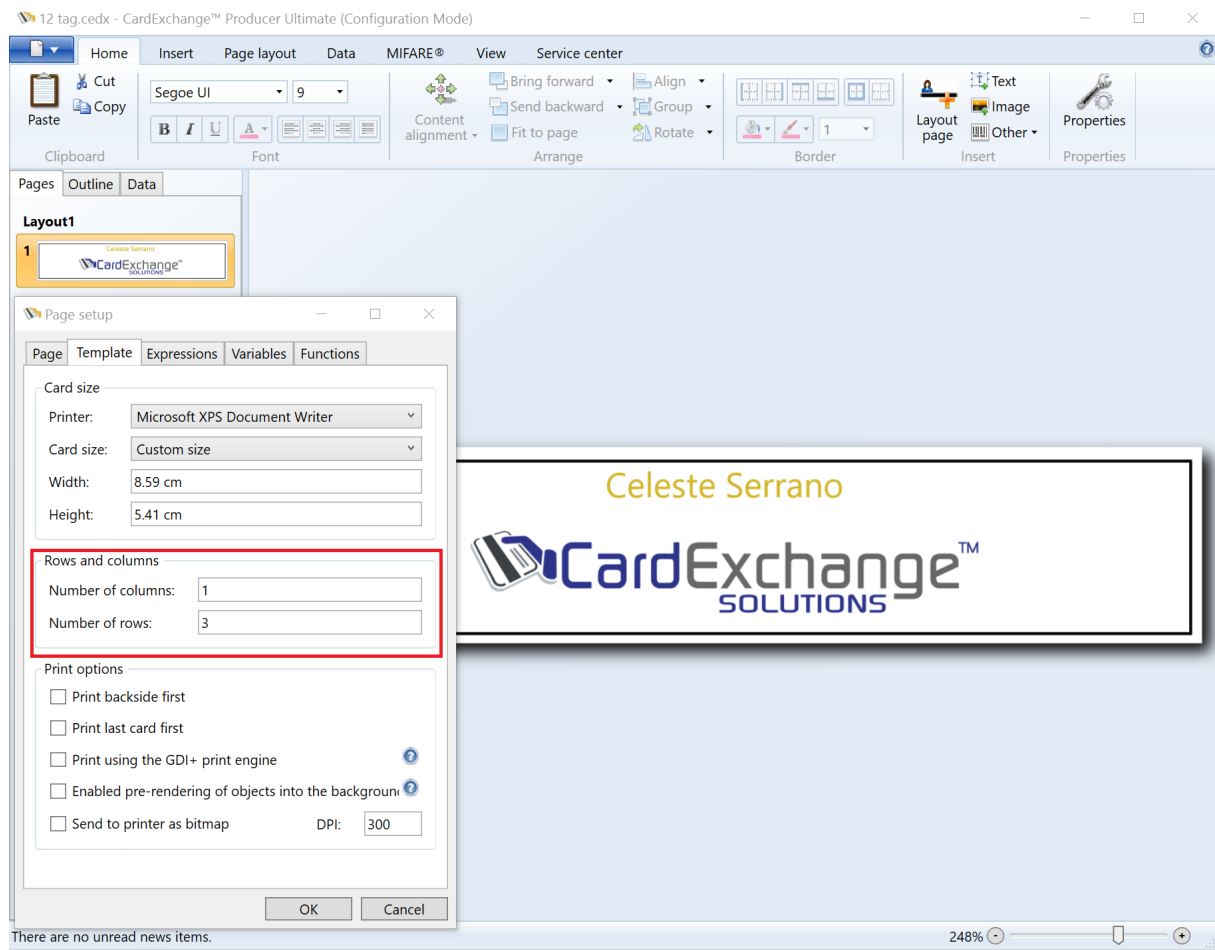
The screenshot shows the 'Card Designer' application window. At the top, there are tabs for 'Database columns', 'Manual entries', 'Expressions', 'Variables', and 'Functions'. Below these are sub-tabs for 'Content', 'Position', 'Text', 'Border', 'Colors', and 'Visibility'. The 'Content' sub-tab is active. The 'Magnetic encoding' section is visible, with three tracks: Track 1 (Phil), Track 2 (2), and Track 3 (1234567890). Below this is the 'Start and stop sentinels' section, which is highlighted with a blue border. It contains a 'Printer:' dropdown menu set to 'Microsoft XPS Document Writer', an 'Apply defaults' button, and three rows for Track 1, Track 2, and Track 3, each with a start sentinel (e.g., ~1%, ~2;, ~3;) and a stop sentinel (?). A red arrow points to the printer dropdown menu. A 'Close' button is at the bottom right.

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.

If you are using specific start and stop sentinels, you can directly enter them into the text boxes.

7.5 Rows and Columns



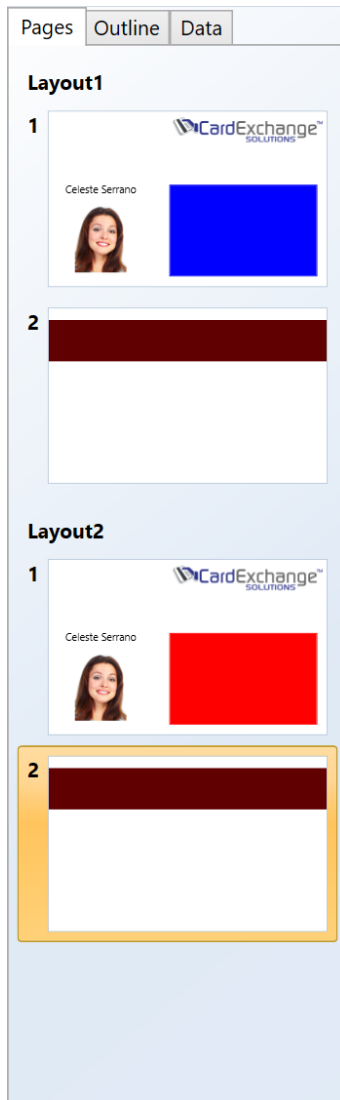
CardExchange® Producer offers the possibility to print multiple records on a your card. This can be very handy when printing, for example, breakable cards for key chains.

Select the [Layout](#) ²³⁶, open the [Page Setup](#) ¹⁷⁸ 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:



Of course, because CardExchange® Producer supports Windows printers, you can also use this to create face books for your A4 or Letter printers.

7.6 Templates



As you have read in the [Designer Interface](#)^[169] 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 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](#)^[192] settings. By selecting the layout, you can simply call the [Page Setup](#)^[178] window from the [Main Menu](#)^[201] to set the specific conditions.

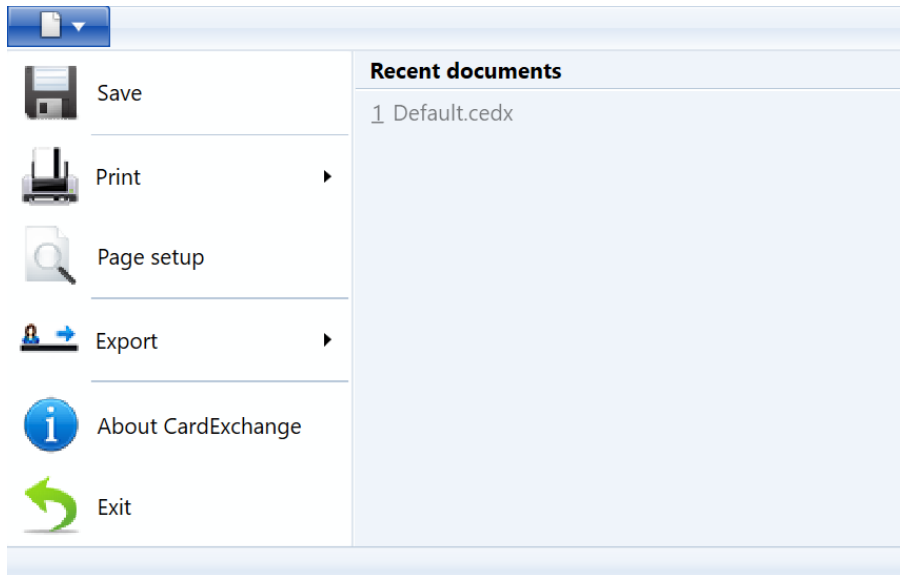
This offers very powerful functionality. Using Multiple Layouts inside one Template makes it for example, possible to automatic switch between the different available Layouts within the Template. More information how to create this type of functionality can be found in the [Expressions](#)^[184] section of this Help file.

More information about Layouts can be found in the "[Adding Layout\(s\)](#)"^[237] 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.

7.7 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.

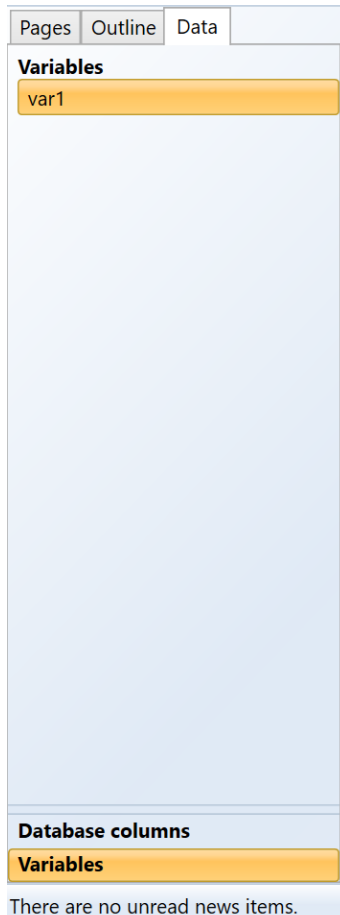
Available functionality

- **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](#)"¹⁷⁸ 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

- **Exit**

This will exit the Card Designer and close the Configuration mode

7.8 Variables

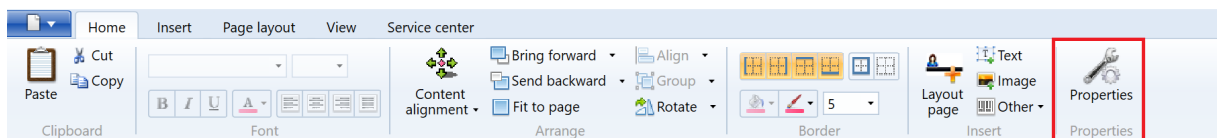


The variables in the CardExchange® Producer designer can be used as input for Python scripts and their value can be mapped to for example a database column or a manual entry. Mappings are made via the [Content](#)²⁰⁴ tab in the [Properties](#)²⁰² window.

Please visit the [Variables](#)²³³ section of this Help file for more information about using Variables.

Variables are available in the Ultimate edition.

7.9 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](#)²⁰⁴

- [Position](#) ²⁰⁸
- [Text](#) ²⁰⁹
- [Border](#) ²¹²
- [Colors](#) ²¹⁶
- [Visibility](#) ²²³
- [Database Columns](#) ²²⁷
- [Manual Entries](#) ²²⁹
- [Expressions](#) ¹⁸⁴
- [Variables](#) ¹⁸⁸
- [Functions](#) ¹⁹⁰

Properties

Manual entries | MIFARE® | Expressions | Variables | Functions

Content | Position | Text | Border | Colors | Visibility | Database columns



Photo

Select database column

Column: Photo

Point-to-file options

Letter case: Maintain original

Image folder: Photos\

File extension: .jpg (Joint Photographic Experts Group)

Format: None

Crop ratio

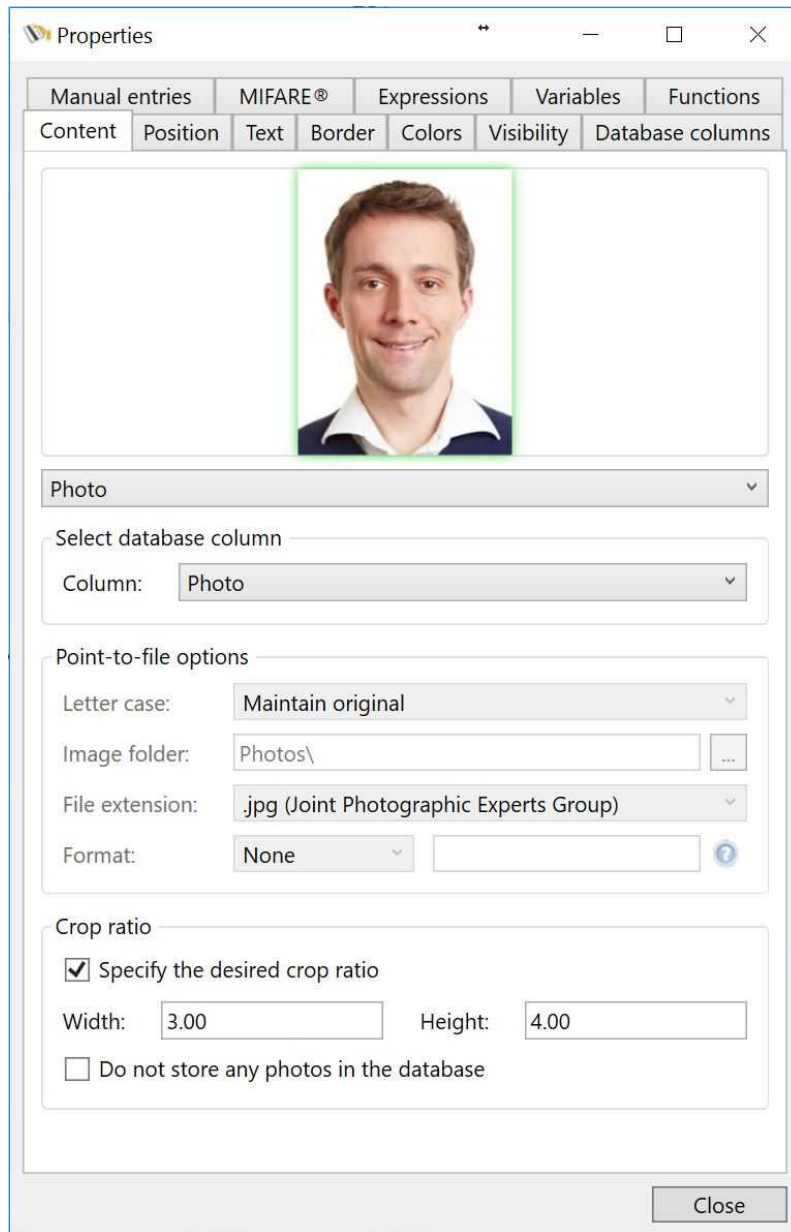
☒ Specify the desired crop ratio

Width: 3.00 Height: 4.00

☐ Do not store any photos in the database

Close

7.9.1 Content



In the content tab you can enter information when you are using a [Fixed Value](#)²⁶² object. This information will then be presented on the Page design in the [Text](#)²⁴² 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.

You can change the information by selecting a different [Standard Object Type](#)^[258]. But can also be set for using photos, signatures, etc. More information can be found in the "[Using Images](#)"^[243] 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](#)^[172] in the [Explorer Menu](#)^[171] and drag and drop this field directly into the Content text area.

Formatting Options

The screenshot shows the 'Properties' dialog box with the 'Content' tab selected. The 'Database columns' sub-tab is also active. The main content area displays 'VISITOR-10003-2016'. Below this, the 'ID Number' dropdown is set to 'ID Number'. The 'Formatting options' section includes: 'Letter case' set to 'Maintain original'; 'Prefix' set to 'VISITOR-1' with an 'Always visible' checkbox; 'Suffix' set to '-2016' with an 'Always visible' checkbox; 'Format' set to 'Integer' with a 'd4' format string and a 'Reverse byte order' checkbox; and a 'Concatenate' button. A 'Close' button is at the bottom right.

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

- **Uppercase** - Makes the content Uppercase
- **Namecase** - Makes all the first letters Uppercase

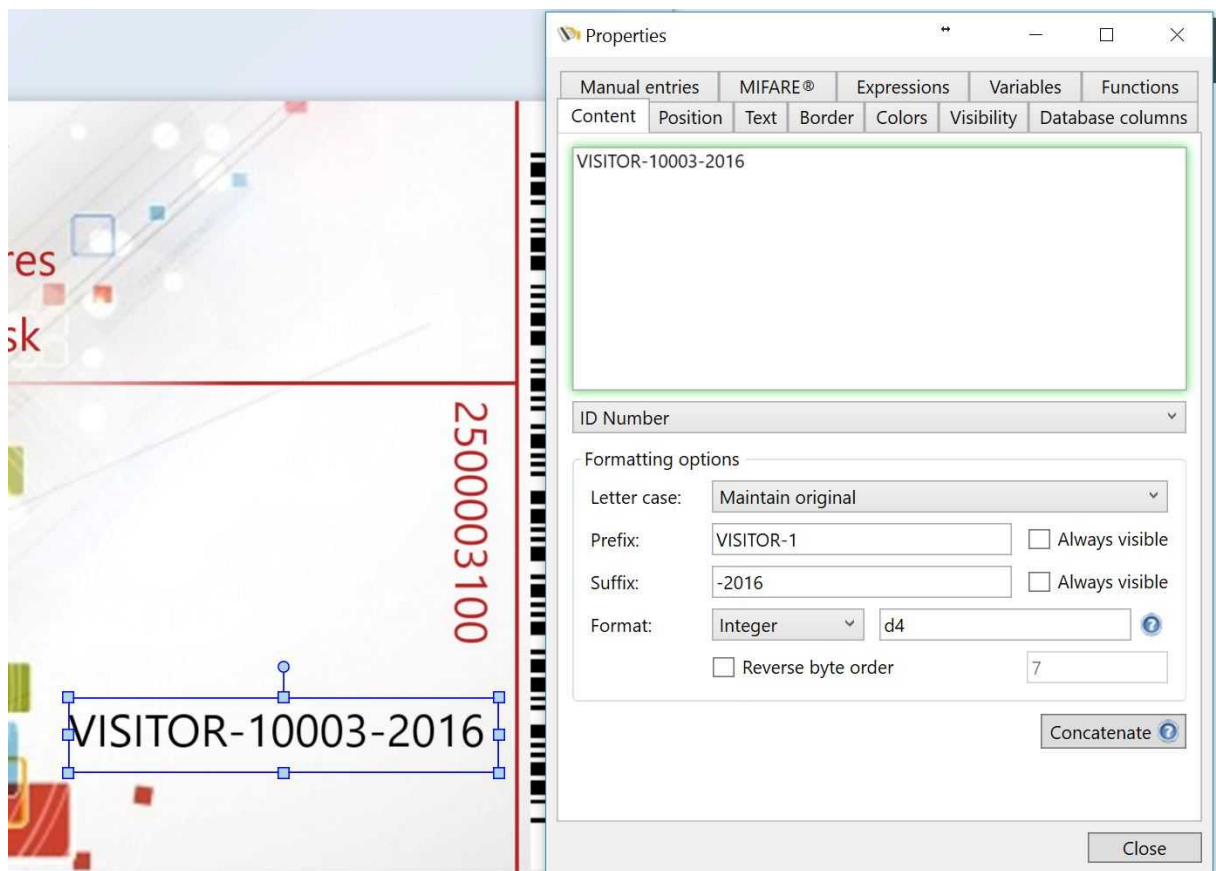
You can add a prefix and a suffix to your content and make it always visible. By default it is unchecked which means that if there is no content available, for example from the database, the prefix or suffix information will not shown.

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:



7.9.2 Position

The screenshot shows the 'Properties' dialog box with the 'Position' tab selected. The dialog has a title bar with standard window controls. Below the title bar are two rows of tabs: 'Manual entries', 'MIFARE®', 'Expressions', 'Variables', 'Functions' in the first row, and 'Content', 'Position', 'Text', 'Border', 'Colors', 'Visibility', 'Database columns' in the second row. The 'Position' tab is active, showing a 'Position and size' section with four checked items: 'Left' (4.51 cm), 'Top' (4.17 cm), 'Width' (3.01 cm), and 'Height' (0.53 cm). To the right of these are four margin fields, all set to 0.00 cm. Below this is an 'Alignment' section with three dropdown menus: 'Horizontal alignment' (Stretch), 'Vertical alignment' (Stretch), and 'Stretch' (None). At the bottom is a 'Rotation' section with a 'Rotation angle' field set to 0°. A 'Close' button is at the bottom right.

Position and size			
<input checked="" type="checkbox"/> Left:	4.51 cm	Left margin:	0.00 cm
<input checked="" type="checkbox"/> Top:	4.17 cm	Top margin:	0.00 cm
<input checked="" type="checkbox"/> Width:	3.01 cm	Right margin:	0.00 cm
<input checked="" type="checkbox"/> Height:	0.53 cm	Bottom margin:	0.00 cm

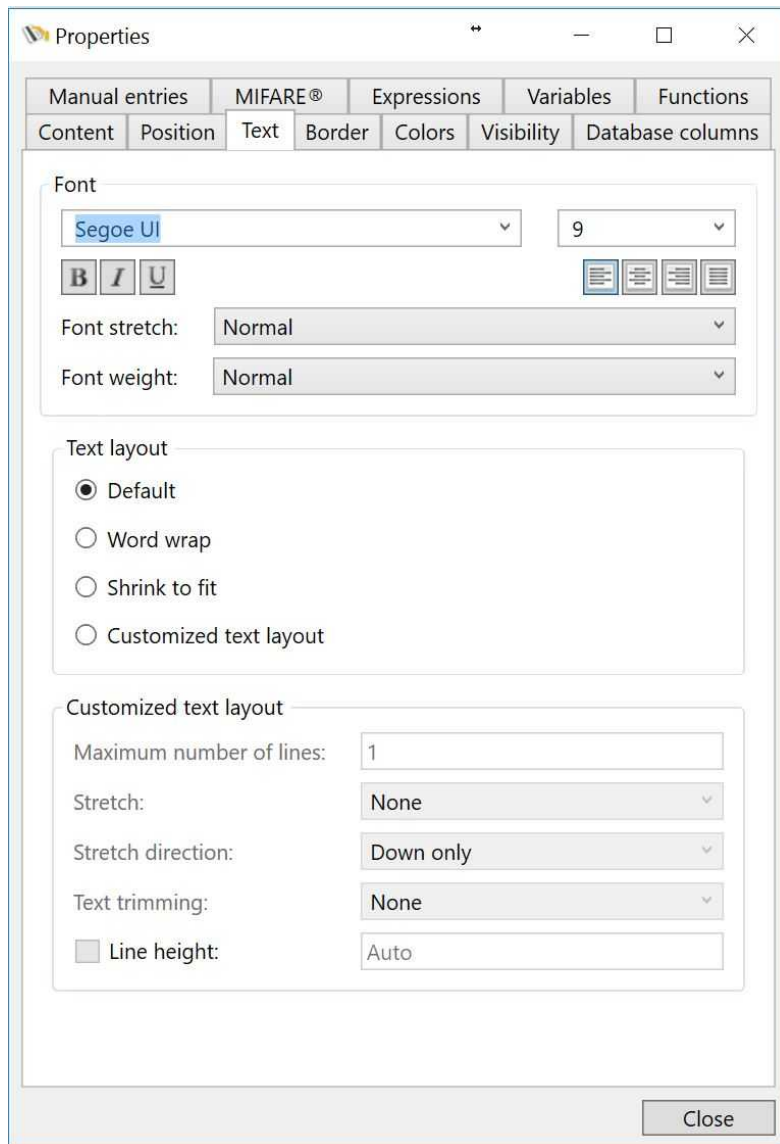
Alignment	
Horizontal alignment:	Stretch
Vertical alignment:	Stretch
Stretch:	None

Rotation	
Rotation angle:	0°

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.

7.9.3 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**

- **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.

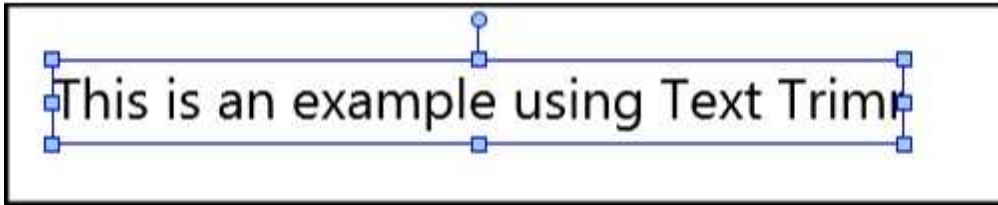


Text Object without Stretch

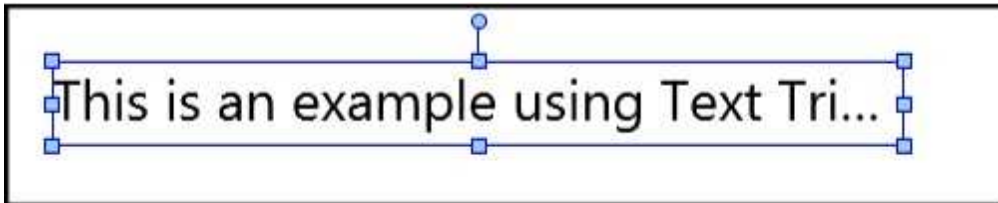


Text Object with Stretch set to Fill, Stretch Direction to Down Only

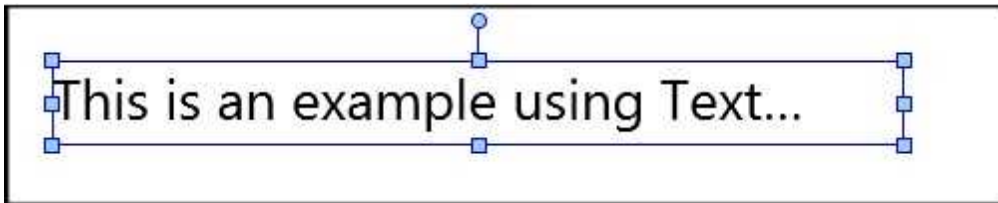
In stead of using Stretch functionality, you can also trim the text. There are basically three options for text trimming:



Text Object without Text Trimming

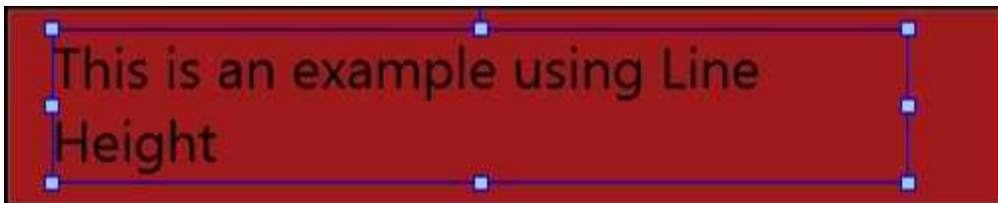


Text Object with Character Ellipsis Text Trimming

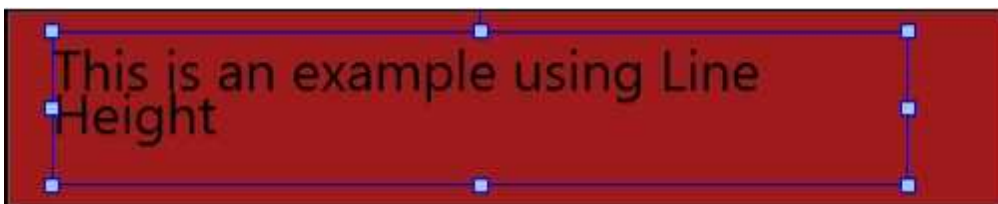


Text Object without Text Trimming

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](#)¹⁷⁶ tab, centimeters, inches, or pixels. See example below:



Text Object without using Line Height



Text Object using 0.10" Line Height

7.9.4 Border

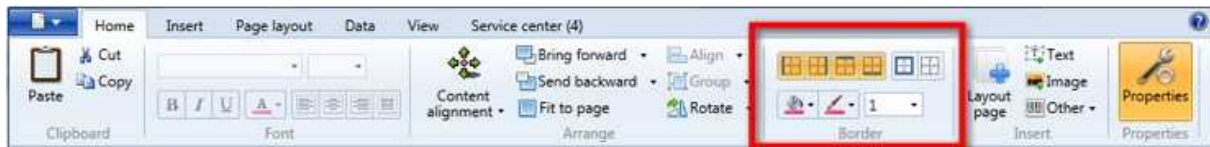
The screenshot shows the 'Properties' window with the 'Border' tab selected. The window has a title bar with standard Windows controls. Below the title bar is a tabbed interface with the following tabs: 'Manual entries', 'MIFARE®', 'Expressions', 'Variables', 'Functions', 'Content', 'Position', 'Text', 'Border' (selected), 'Colors', 'Visibility', and 'Database columns'. The 'Border' tab contains three sections: 'Border thickness', 'Corner radius', and 'Padding'. Each section has four input fields for 'Left', 'Right', 'Top', and 'Bottom' values, all currently set to '0.00 cm'. The 'Left' field in the 'Border thickness' section is highlighted with a blue selection box. A 'Close' button is located at the bottom right of the window.

Border thickness			
Left:	0.00 cm	Right:	0.00 cm
Top:	0.00 cm	Bottom:	0.00 cm

Corner radius			
Top-left:	0.00 cm	Top-right:	0.00 cm
Bottom-left:	0.00 cm	Bottom-right:	0.00 cm

Padding			
Left:	0.00 cm	Right:	0.00 cm
Top:	0.00 cm	Bottom:	0.00 cm

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:



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](#)¹⁷⁶ tab. This object looks like below:



Now we set the Border Thickness to 5 pixels for the Right and Bottom:

Properties

Manual entries MIFARE® Expressions Variables Functions

Content Position Text Border Colors Visibility Database columns

Border thickness

Left: 0 Right: 5

Top: 0 Bottom: 5

Corner radius

Top-left: 0 Top-right: 0

Bottom-left: 0 Bottom-right: 0

Padding

Left: Right:

Top: Bottom:

Close

Now the photo object will look as below

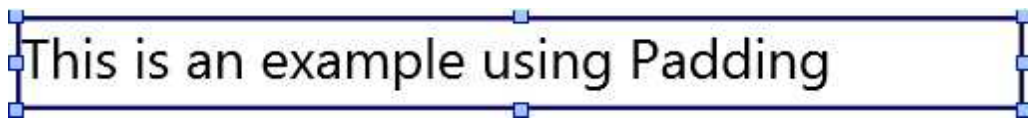


Now you get totally fancy by combining this with the Corner Radius. For example, we set the Corner Radius for the Top-Left and the Bottom-Right to 25 pixels and see the result below:



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](#)²¹⁶ 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.

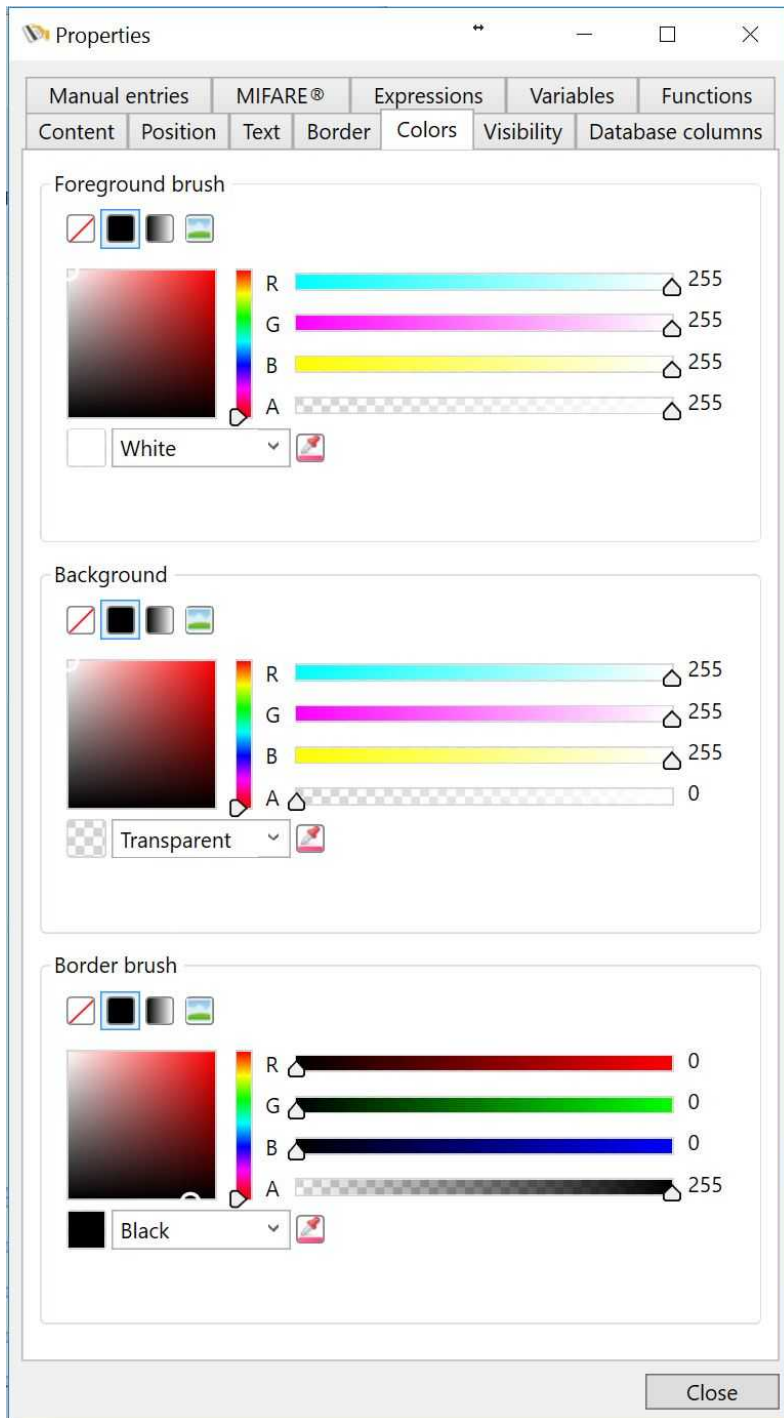


Text Object without Padding



Text Object with Left and Top Padding

7.9.5 Colors



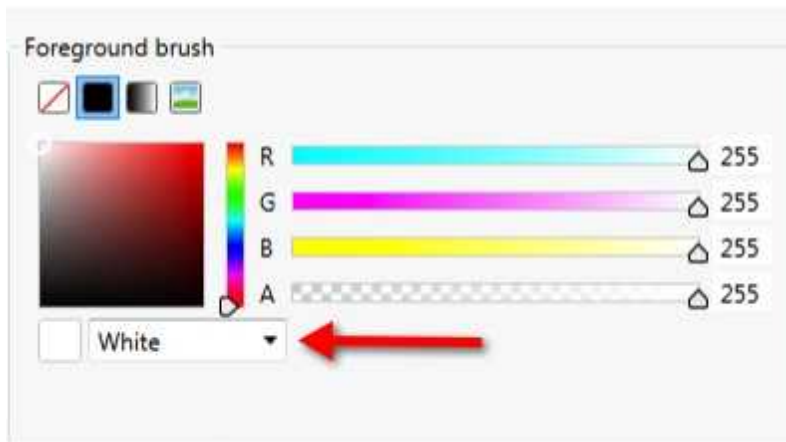
Depending on the object used on the [Page 180](#) design, different color options are available divided in three different groups:

- **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

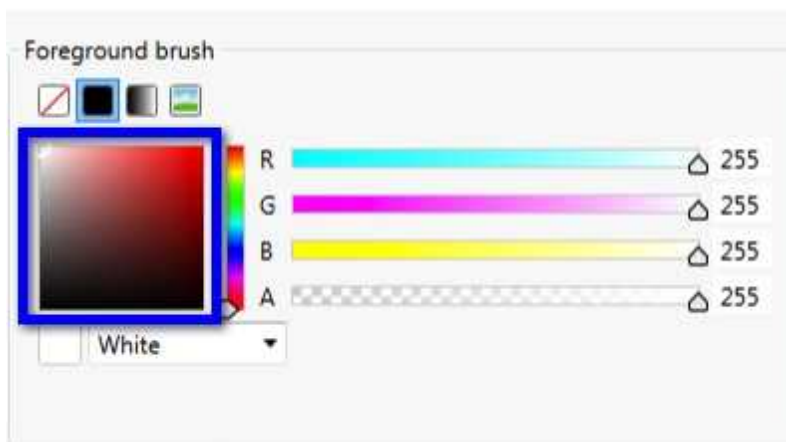
Each group offers four different style options:

-  **Transparent**
-  **Solid color**
-  **Gradient**
-  **Image**

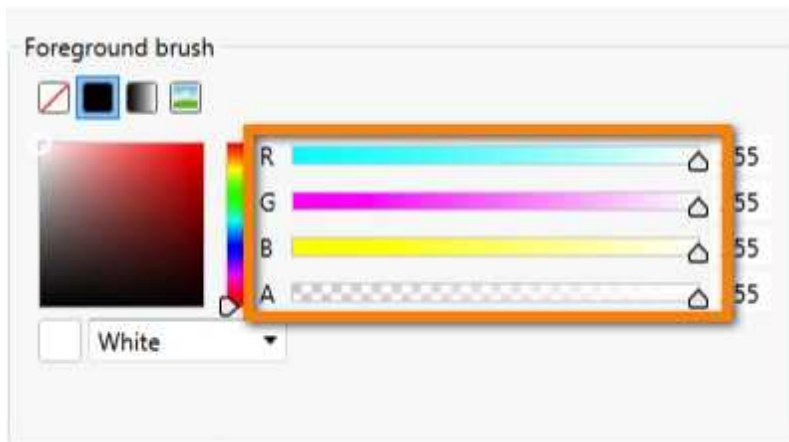
Colors can be selected directly from the drop down menu as indicated with the **red arrow**:



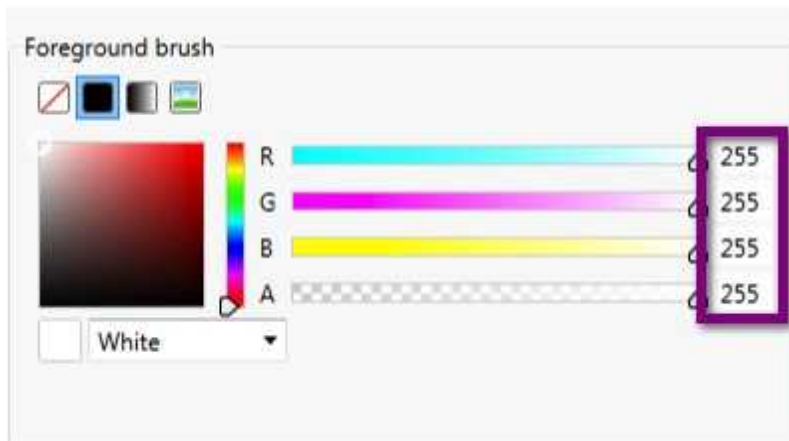
Picked from the color selection area as indicated with the blue rectangle:



Created by moving the color sliders to the preferred position as indicated with the orange rectangle:



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.

7.9.5.1 Text Object Example

For this example we added a text object to the Page design and set the colors as shown below:



The foreground color is set to blue and for the background color we used orange with a gradient style which creates the result below:

Using Color with an Text object...

7.9.5.2 Image Object Example

For this **Image Object** example we added a **Image** of a photo to the [Page](#)¹⁸⁰ design and created a border via the [Border](#)²¹² tab. We have set the system to use pixels and we have the set the properties as following:

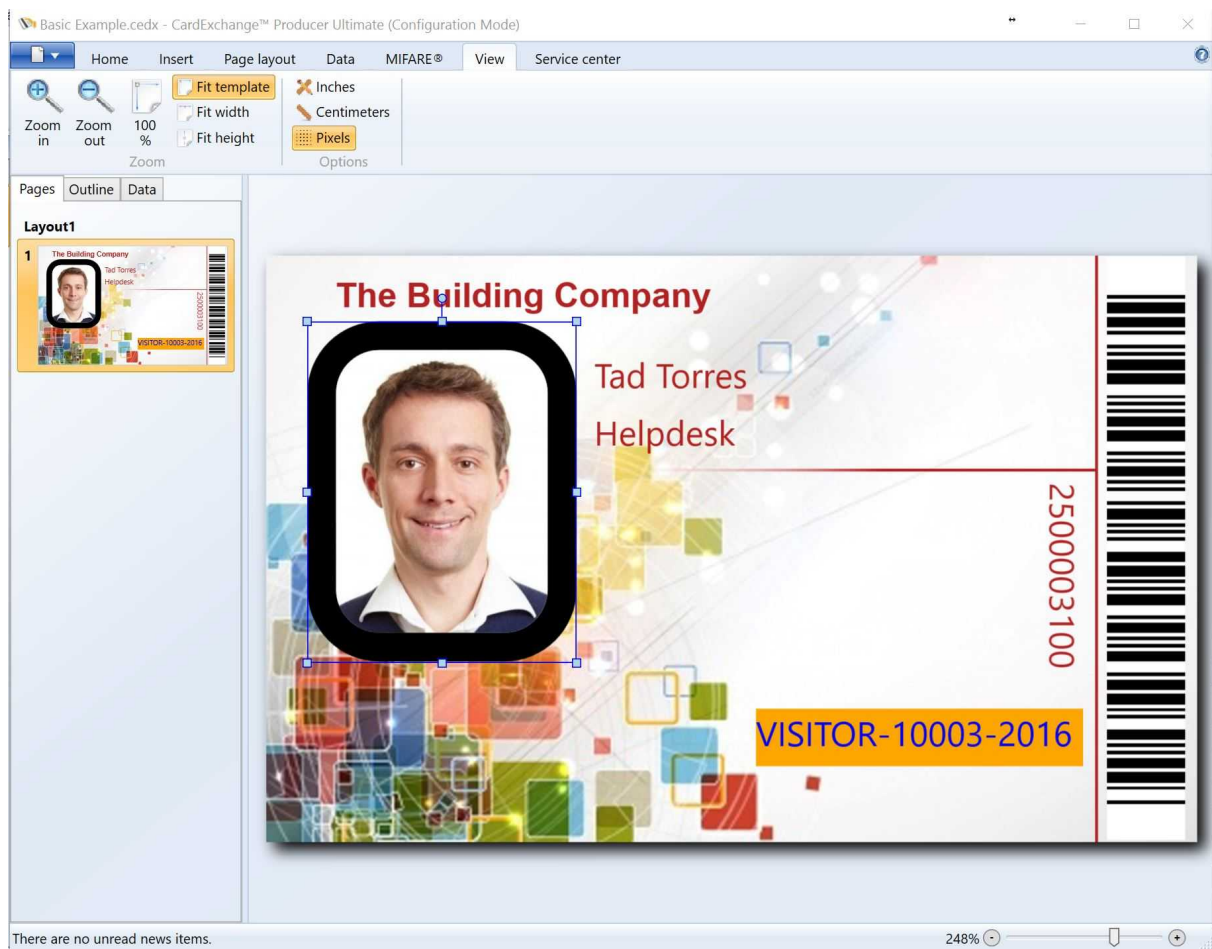
The screenshot shows a 'Properties' dialog box with the 'Border' tab selected. The dialog has a title bar with a maximize button, a close button, and a 'Properties' icon. Below the title bar are two rows of tabs: 'Manual entries', 'MIFARE®', 'Expressions', 'Variables', 'Functions' in the first row, and 'Content', 'Position', 'Text', 'Border', 'Colors', 'Visibility', 'Database columns' in the second row. The 'Border' tab is active, displaying three sections: 'Border thickness' with input fields for Left (10), Right (10), Top (10), and Bottom (10); 'Corner radius' with input fields for Top-left (20), Top-right (20), Bottom-left (20), and Bottom-right (20); and 'Padding' with empty input fields for Left, Right, Top, and Bottom. A 'Close' button is located at the bottom right of the dialog.

Border thickness			
Left:	10	Right:	10
Top:	10	Bottom:	10

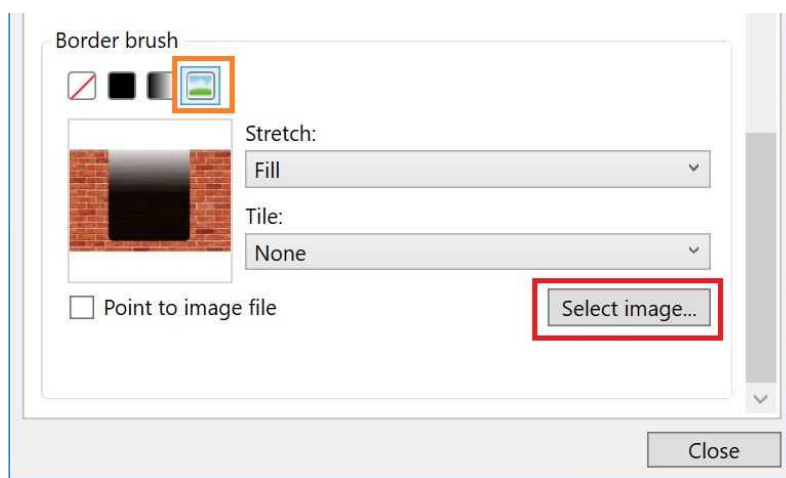
Corner radius			
Top-left:	20	Top-right:	20
Bottom-left:	20	Bottom-right:	20

Padding			
Left:		Right:	
Top:		Bottom:	

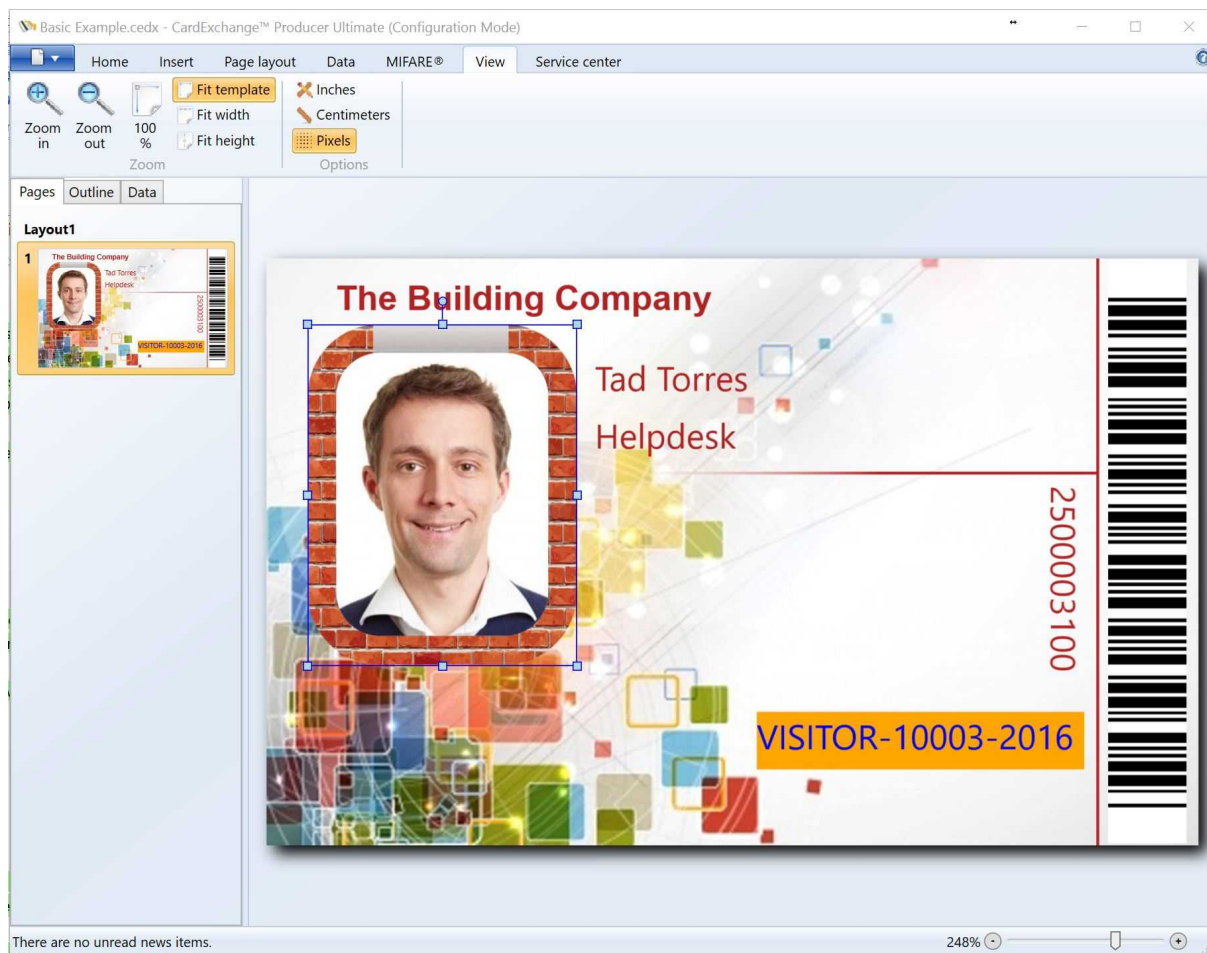
Now the **Image object** on the [Page](#)¹⁸⁰ design looks like below:



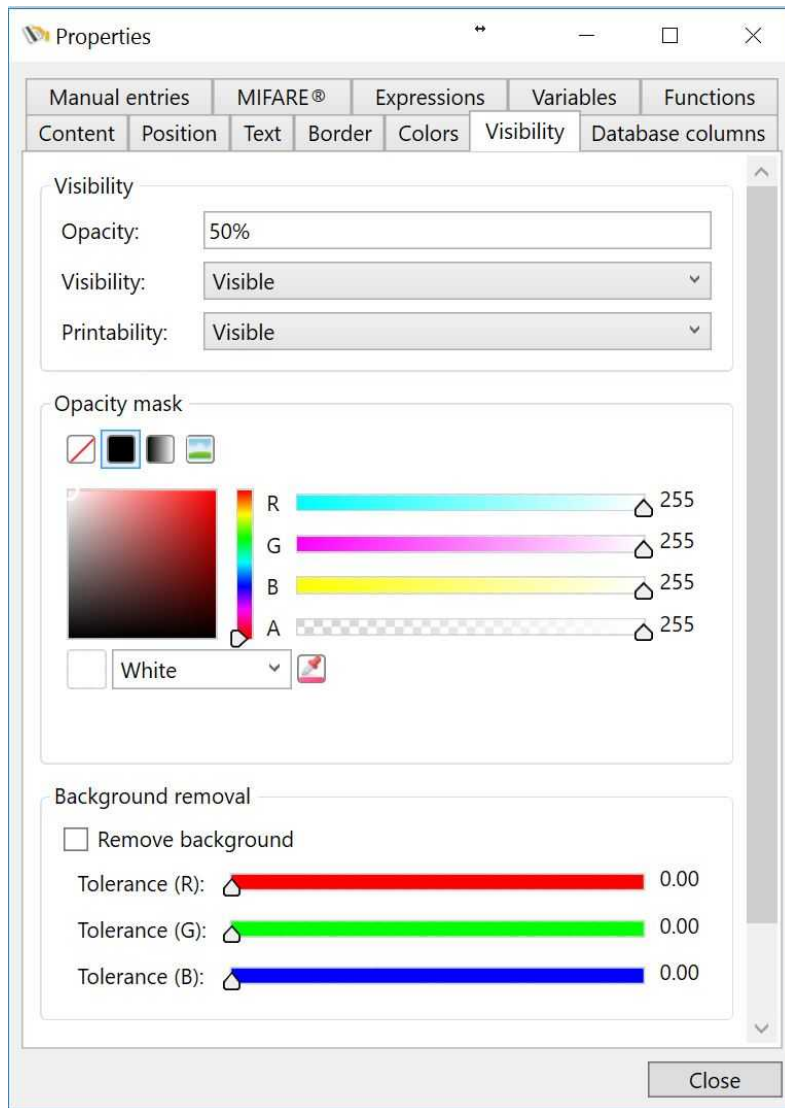
What we will do now is replace the **Solid Color Border** with an Image that we will load.



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 180](#) design will show the following result:



7.9.6 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:

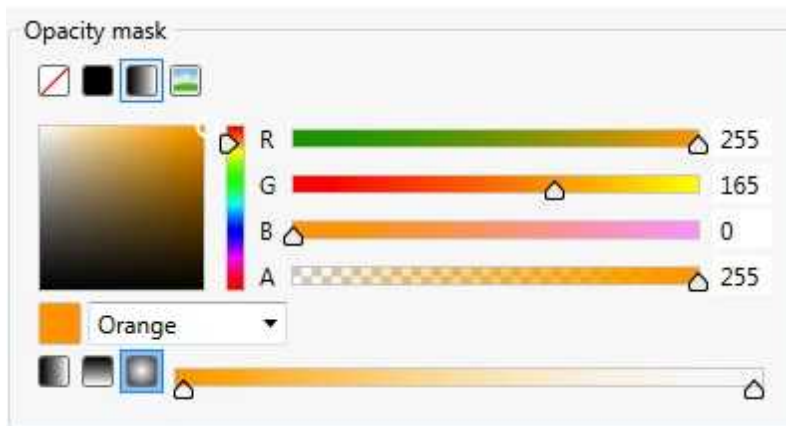
**No Opacity****Opacity 50%**

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.

**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.

Background removal

☒ Remove background

Tolerance (R):  0.10

Tolerance (G):  0.10

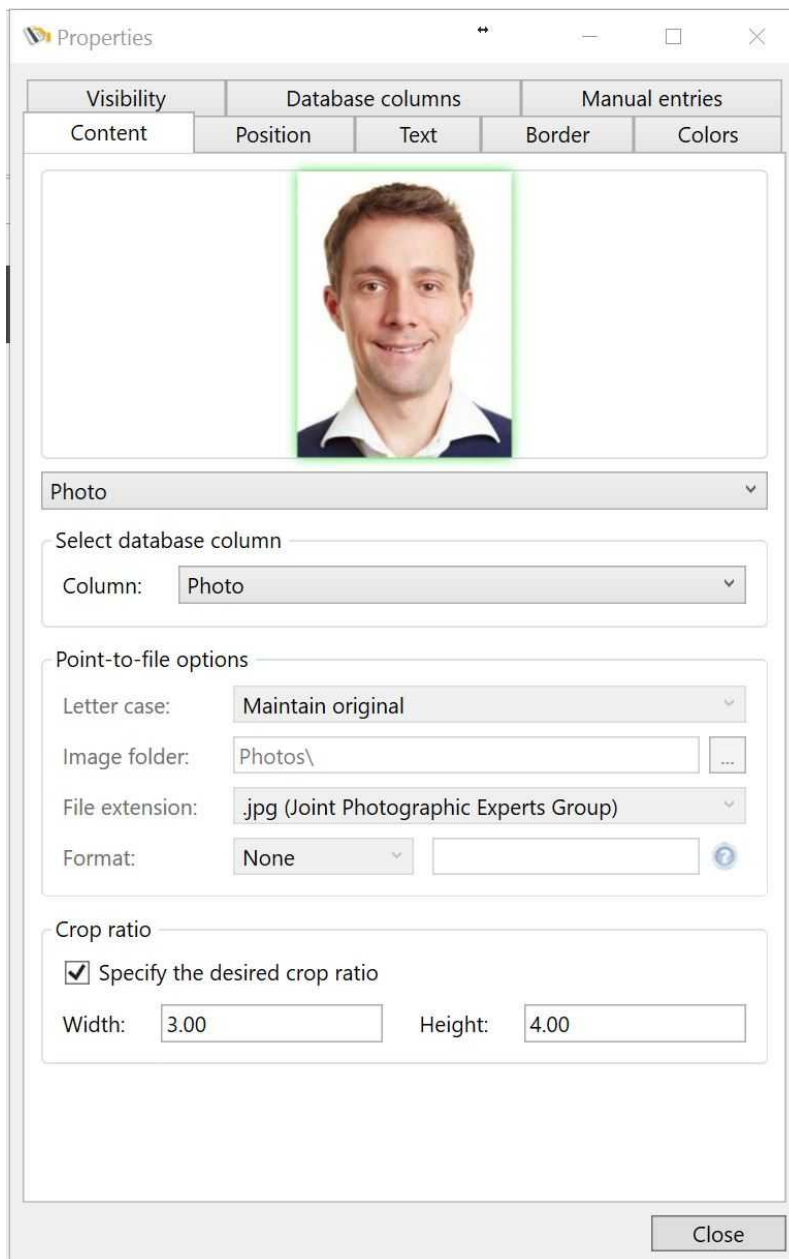
Tolerance (B):  0.12

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.

**No Removal****Background Removed**

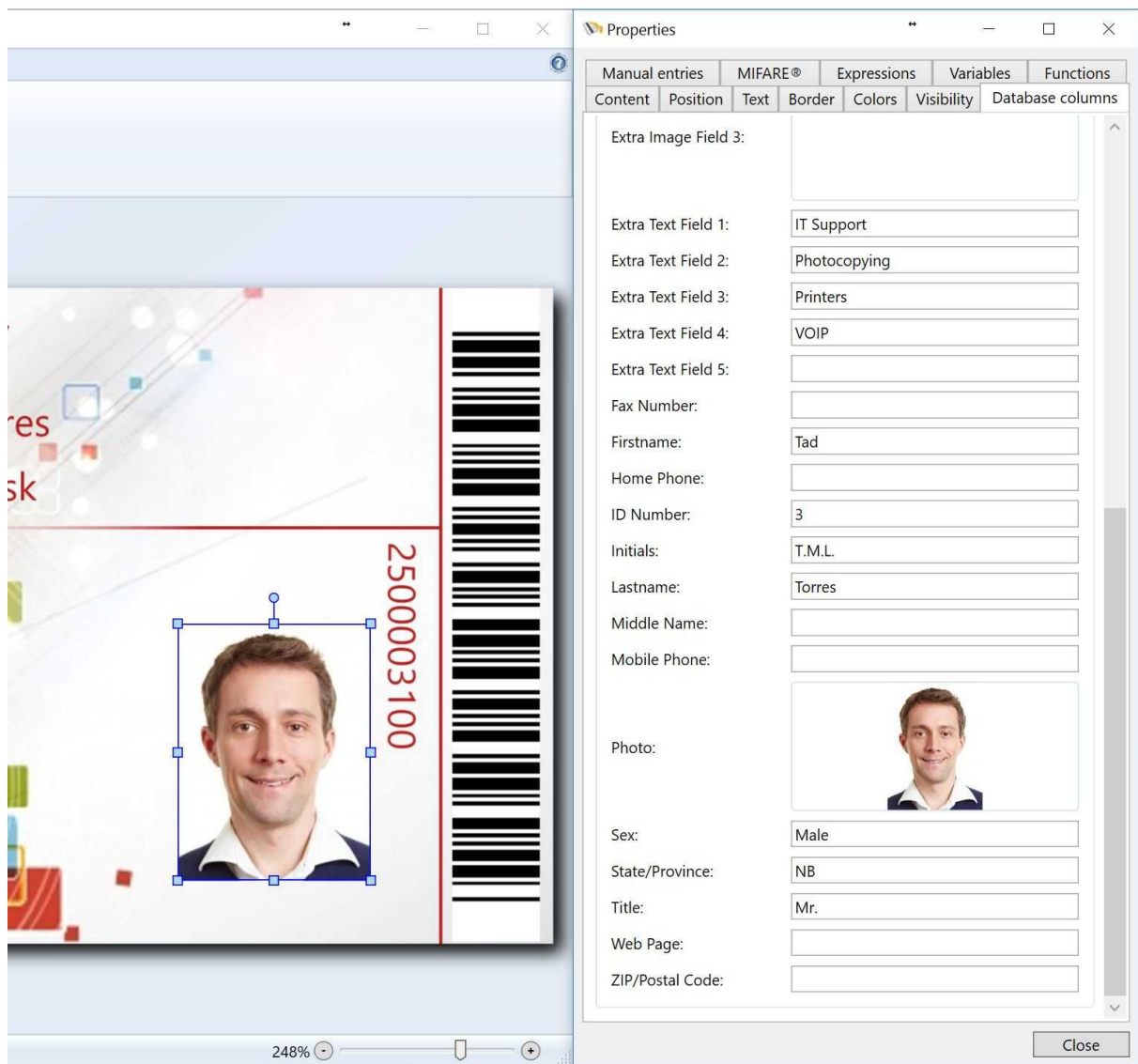
It is important to realize that the result of the background removal depends on the quality of the image and the used background. Always try to use real blue or green backgrounds when taking photos as this offers the best removal result.

7.9.7 Database Columns

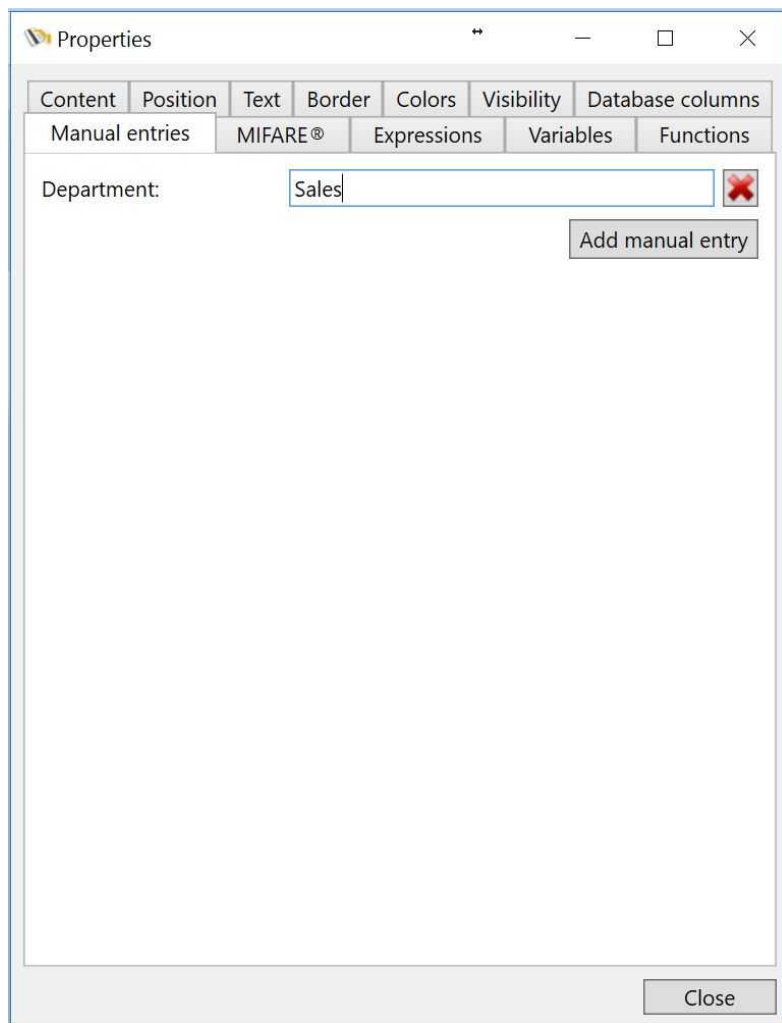


All of the database columns are available in the **Database columns** tab of the [Properties](#) ²⁰² window.

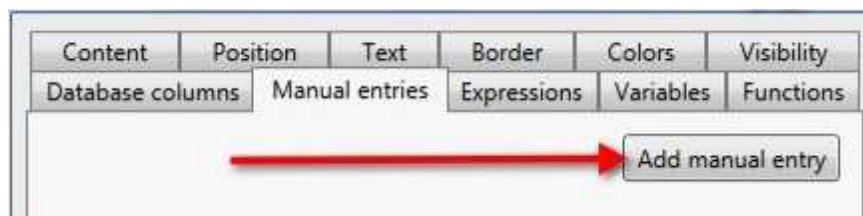
Just like with the [Manual entries](#) ²²⁹, these database columns can be directly drag and dropped to the Page design via the Data tab of the Explorer menu.



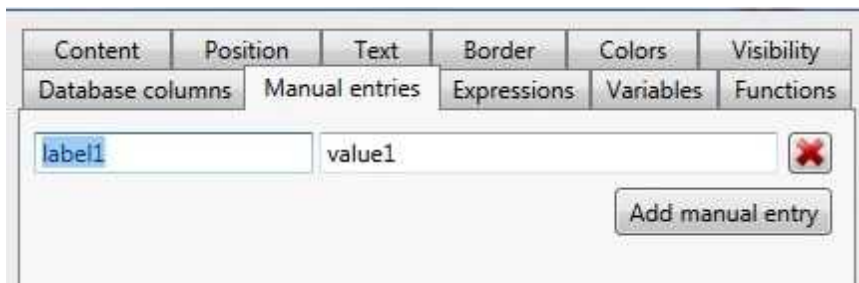
7.9.8 Manual Entries



To add a manual entry, select the Manual entries tab of the Properties window.

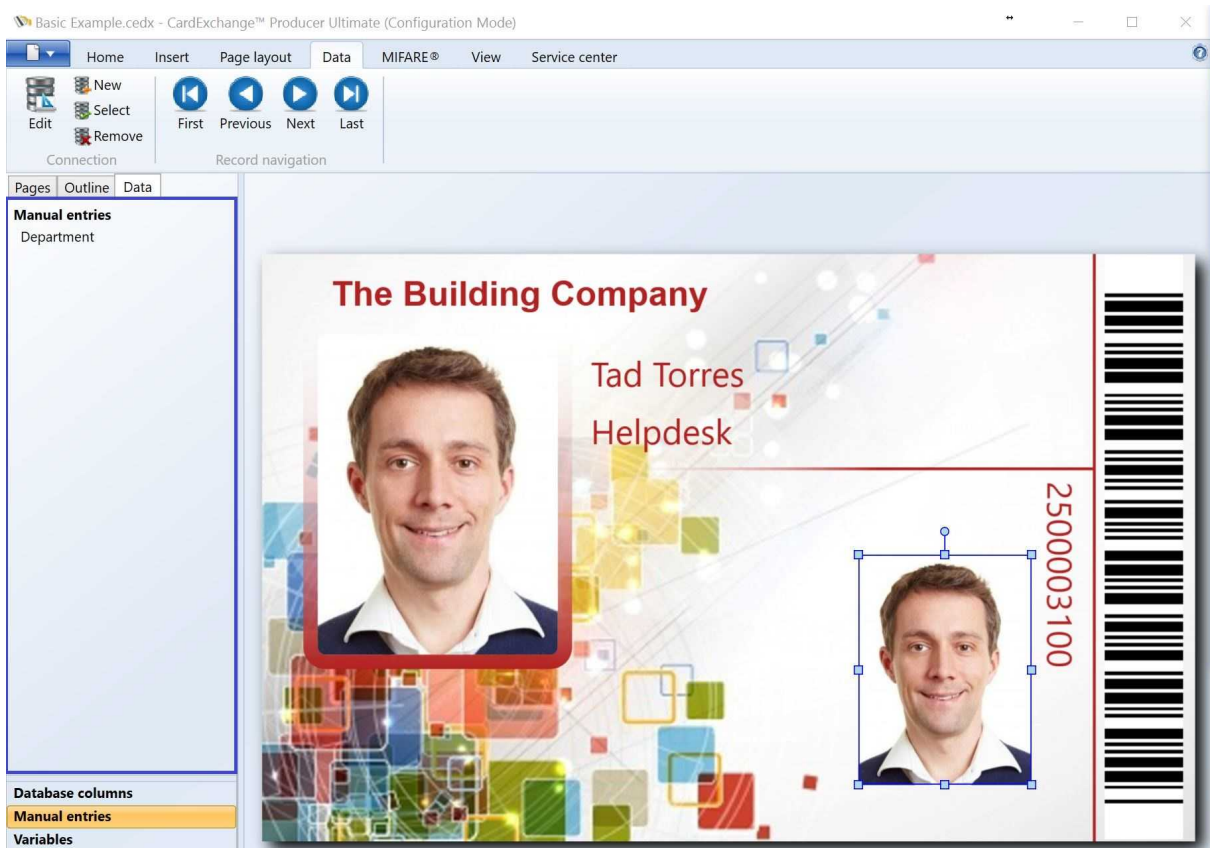


And click the **Add manual entry** button indicated with the **red** arrow.



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.

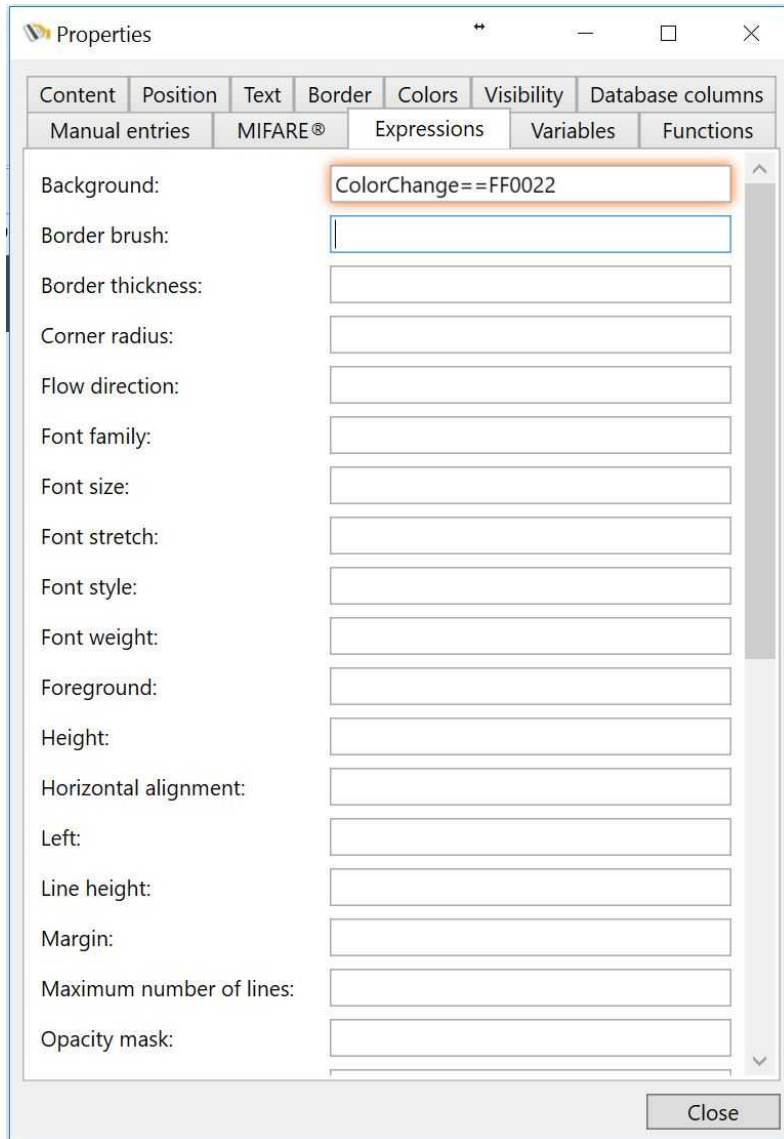
Now when you are done adding your Manual entries, they will become available for adding them to your [Page](#)¹⁸⁰ design in the [Data](#)¹⁷² tab of the [Explorer](#)¹⁷¹ menu.



When you select the [Data](#)¹⁷² tab of the [Explorer](#)¹⁷¹ 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](#)¹⁸⁰ design.

This can also be done from the **Manual entries** tab in the [Properties](#) ²⁰²¹ window.

7.9.9 Expressions



IMPORTANT! Expressions are supported in our Ultimate edition only!

The **Expression** tab of the [Properties](#) ²⁰²¹ 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

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](#)^[188] tab of the [Properties](#)^[202] 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](#)^[190] tab (For more information about [Functions](#)^[190], please see the [Functions](#)^[190] 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

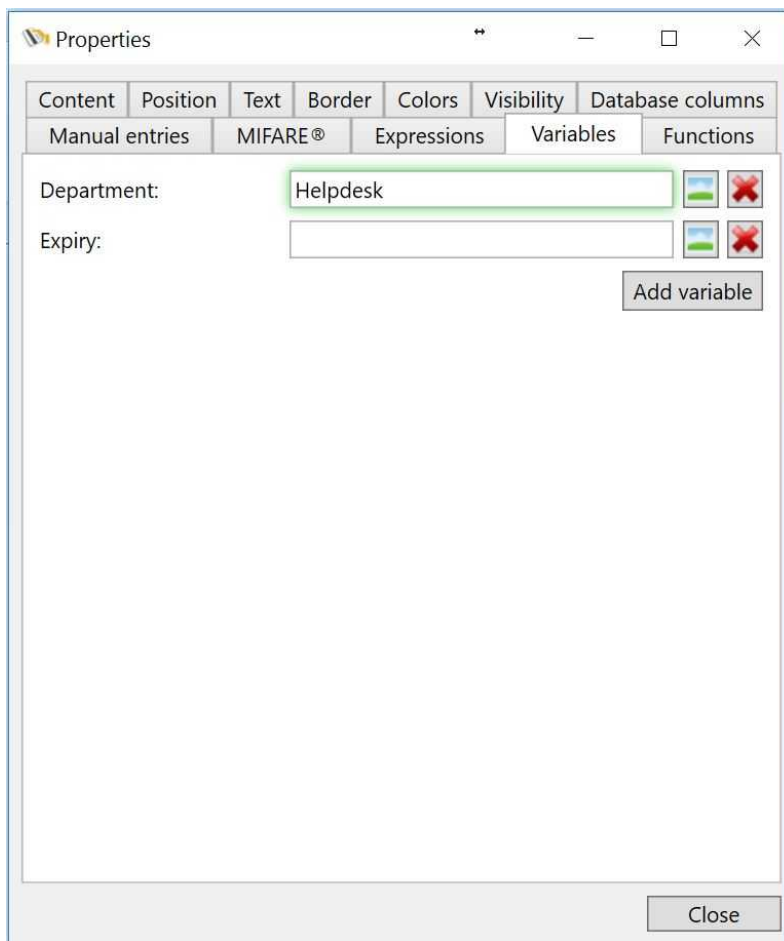
IsValid(vStatus)

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.

7.9.10 Variables



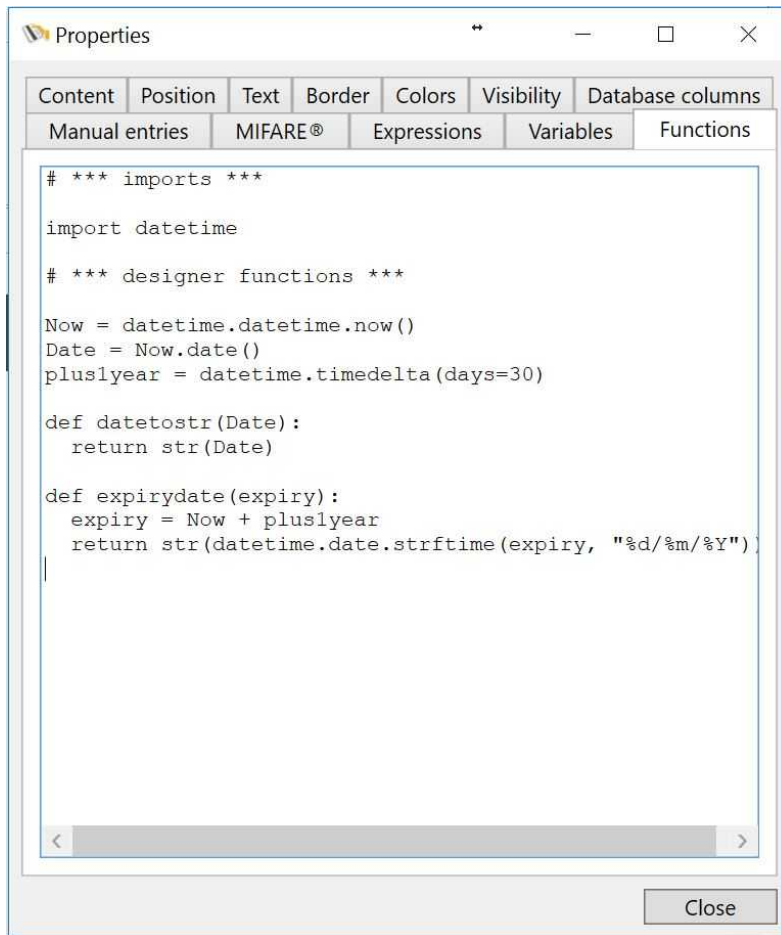
IMPORTANT! Variables are supported in our Ultimate edition only!

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 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.

7.9.11 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](#)²⁰⁴ and [Expressions](#)²³¹ 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'
    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.

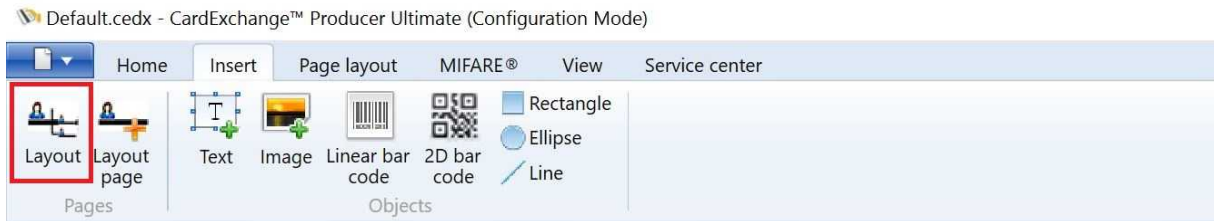
7.10 Layouts

As explained in the [Templates](#)  section of this Help file, Layouts can contain one or 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.

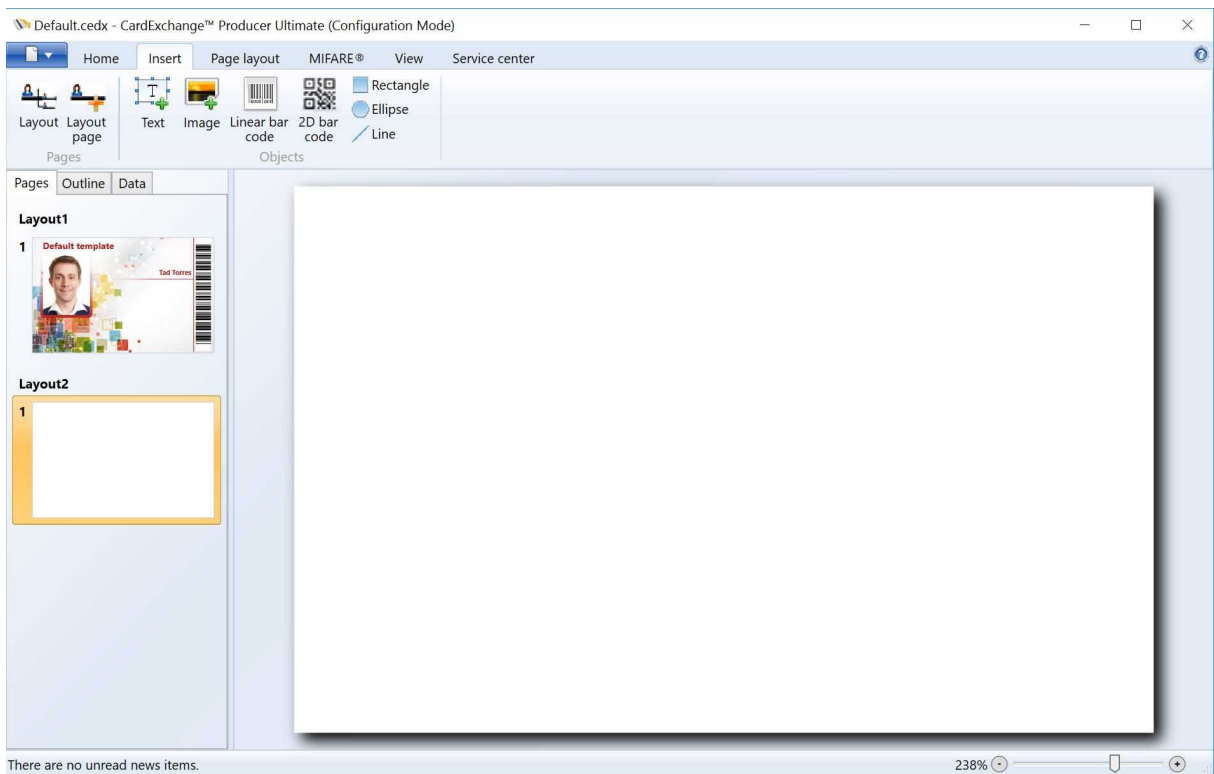
Layouts are very powerful as they offer you the possibility to change based on information out of the connected database. Also each layout can have its own setting like for example,

no magnetic encoding or magnetic encoding.

7.10.1 Adding Layout(s)



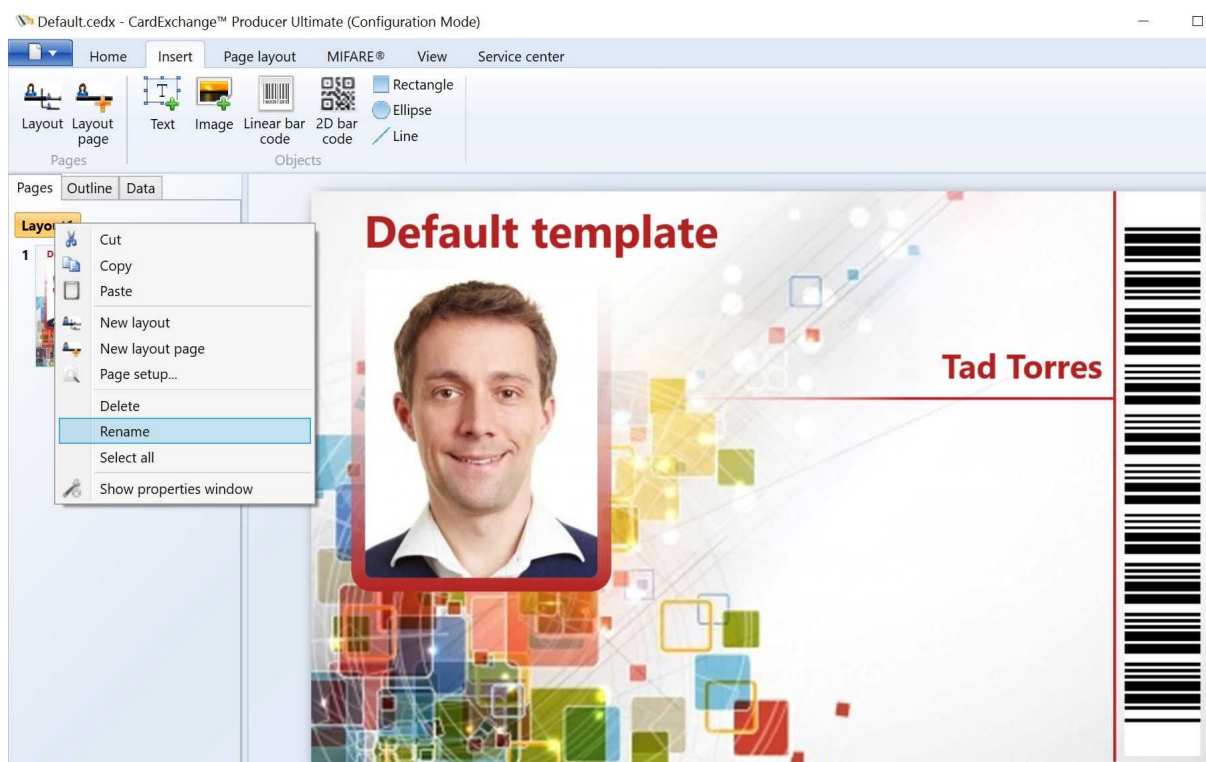
Adding a Layout is simple clicking on the Layout button and a new layout will be added.



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.

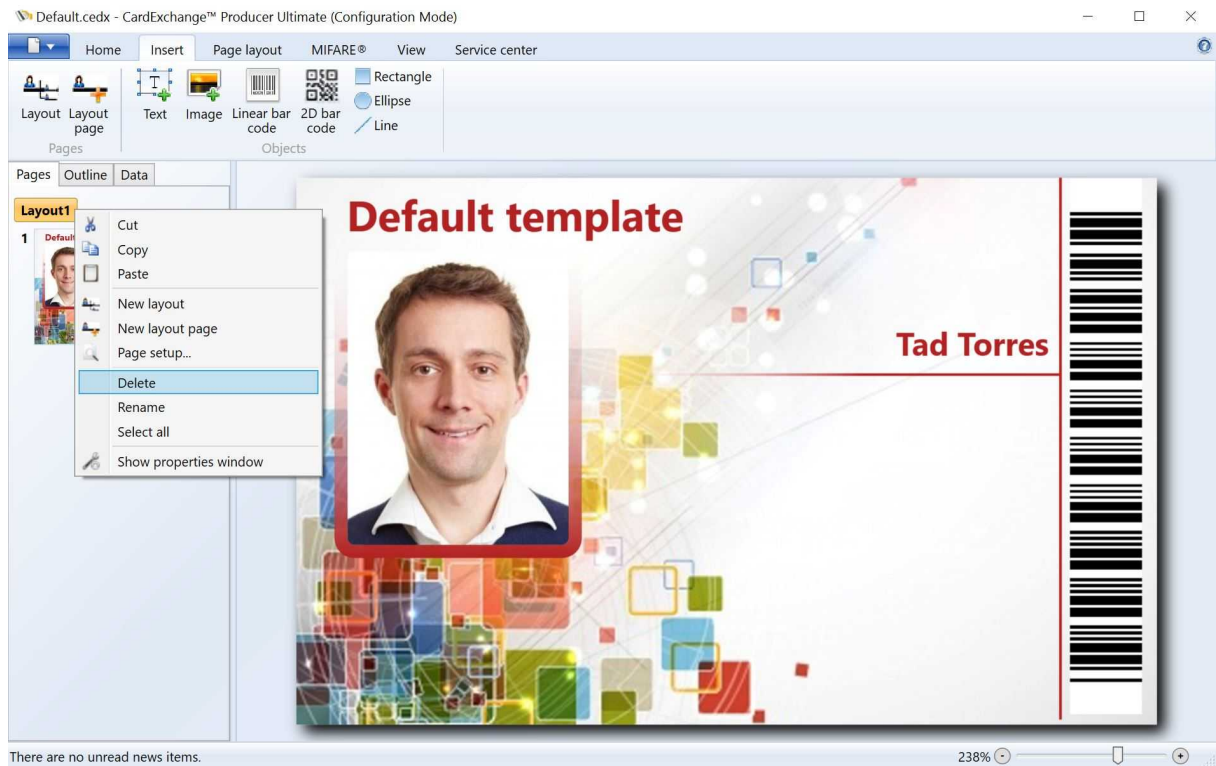
Each page can be setup via the [Page Setup](#) ¹⁷⁸ window as described in that section of this Help file.

7.10.2 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.

7.10.3 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.

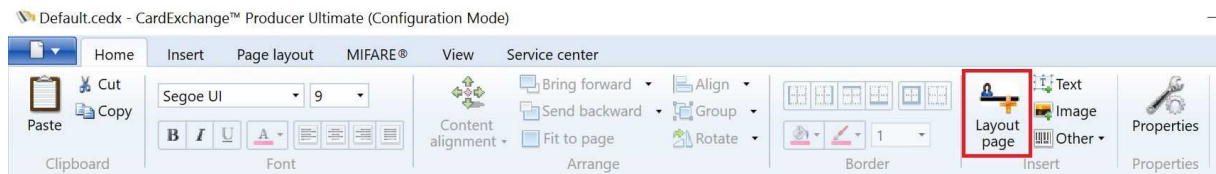
7.11 Page(s)

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.

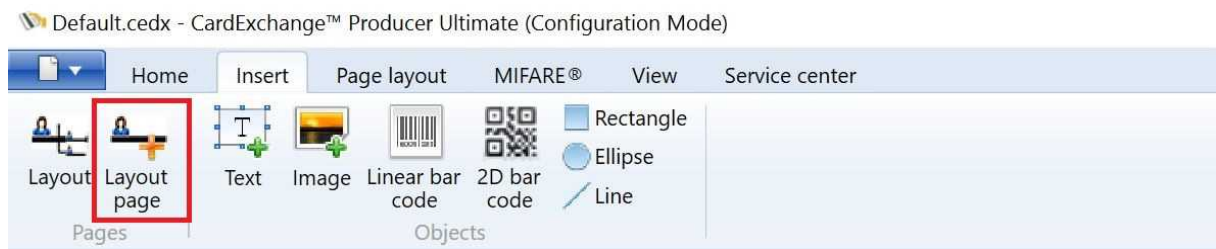
Each Page can be set to Portrait or Landscape and of course can have it's own unique objects.

In this section of the Help file we will explain how to Add pages to your layout and how to Delete them.

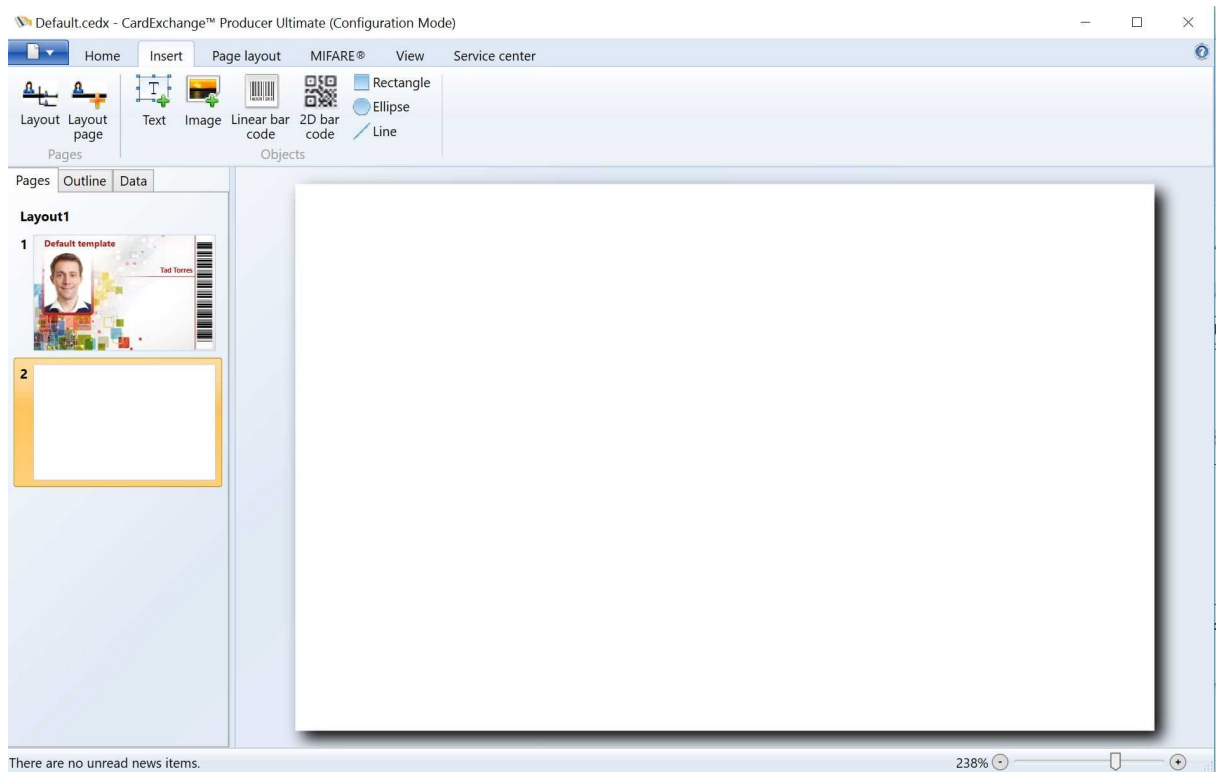
7.11.1 Adding Page(s)



When you have selected your layout, you can add a page by clicking on the Layout Page button in the Home tab.



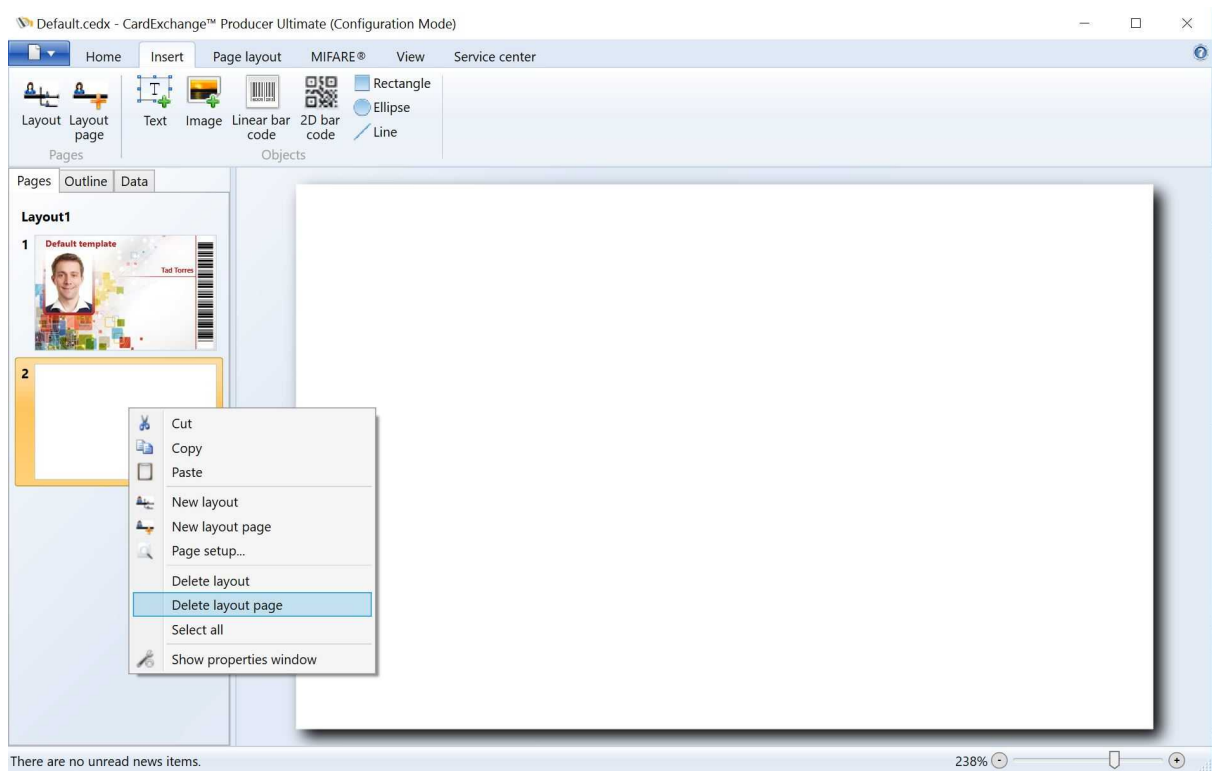
You can also add a Page via the Layout page button in the Insert tab.



Click on Layout page to add the page as shown in the screen shot.

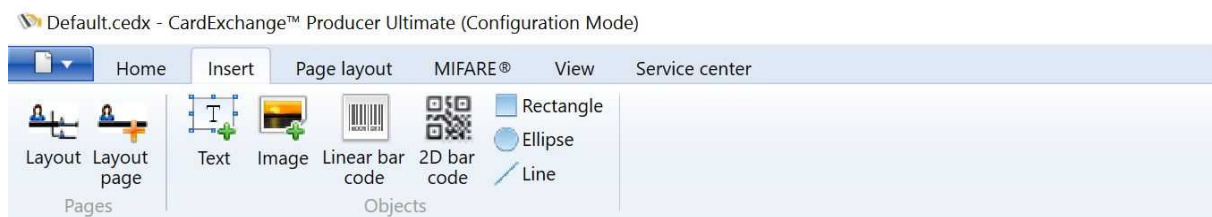
Each page can be setup via the [Page Setup](#)¹⁷⁸ window as described in that section of this Help file.

7.11.2 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.

7.12 Objects

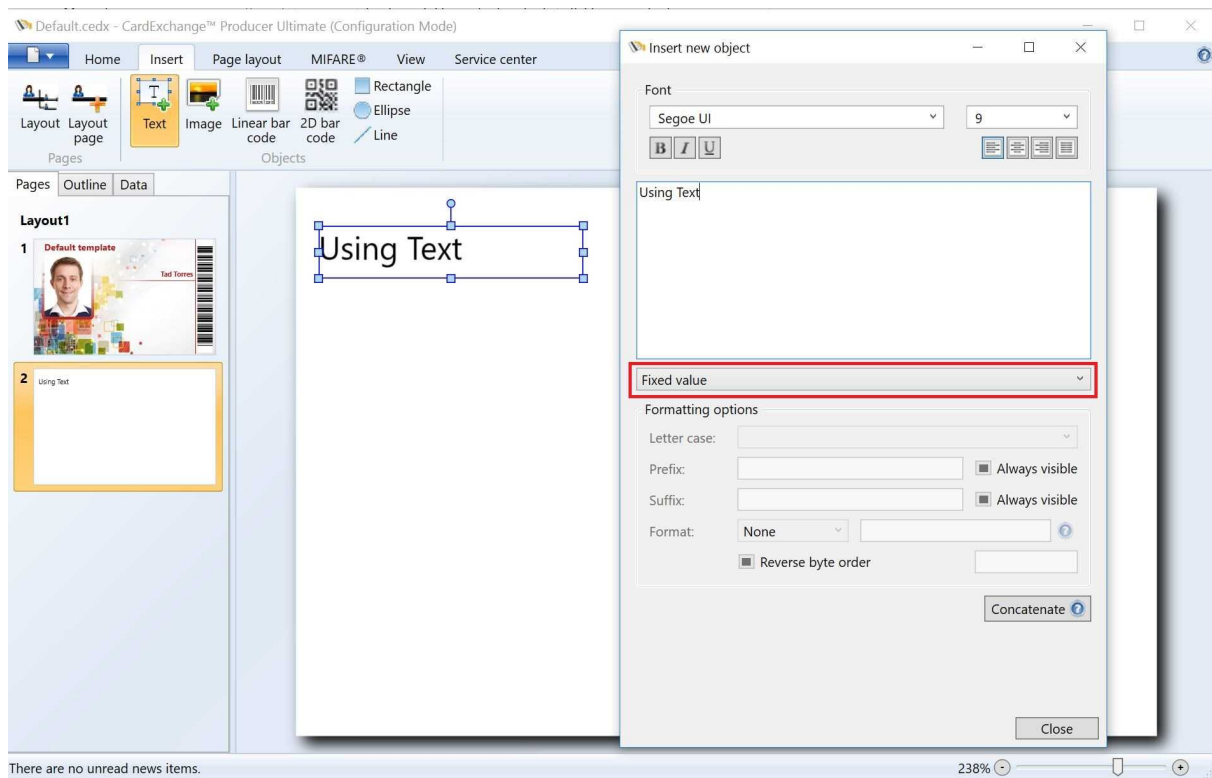


CardExchange® Producer offers a lot of objects to design your card. From standard text objects to image objects for photos and signatures to 1D and 2D barcodes, lines, etc.

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](#) ²⁰² section of this Help file.

In this section we will go over each available object and how to use it.

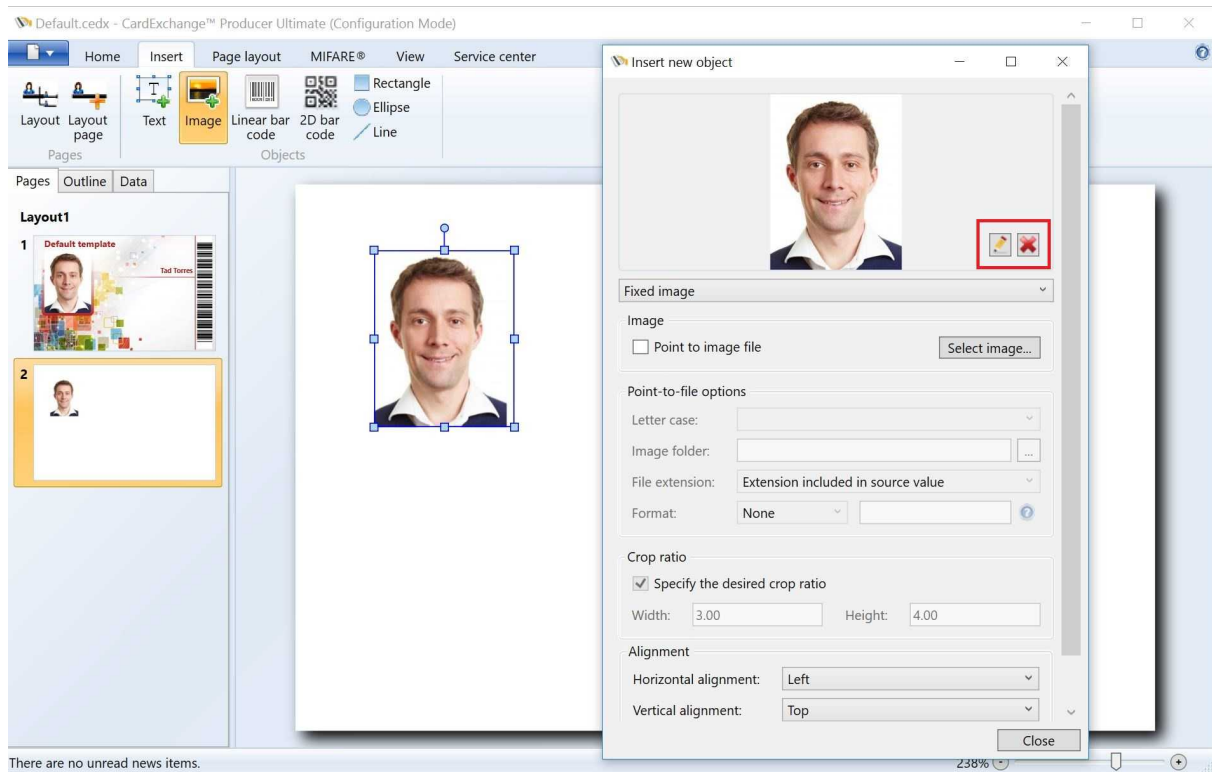
7.12.1 Text



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](#)" ²⁵⁸ section of this Help file.

7.12.2 Image(s)





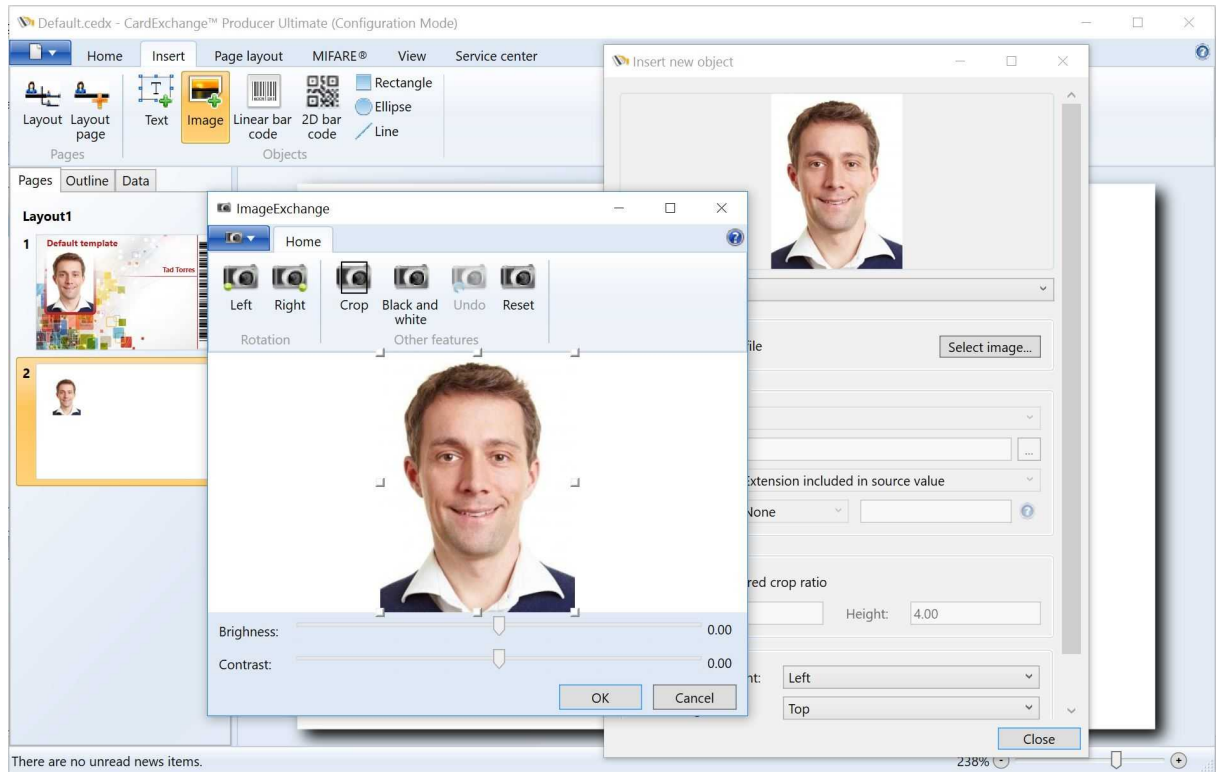
Select the Image object from the Insert tab or from the Insert group at the Home tab and place this on the page by clicking on a location on the page.

When the Insert new object window opens, it is default set to Fixed Image. You can also select [Photo](#)²⁴⁵, [Signature](#)²⁴⁶, [Variable Image](#)²⁴⁷, 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.

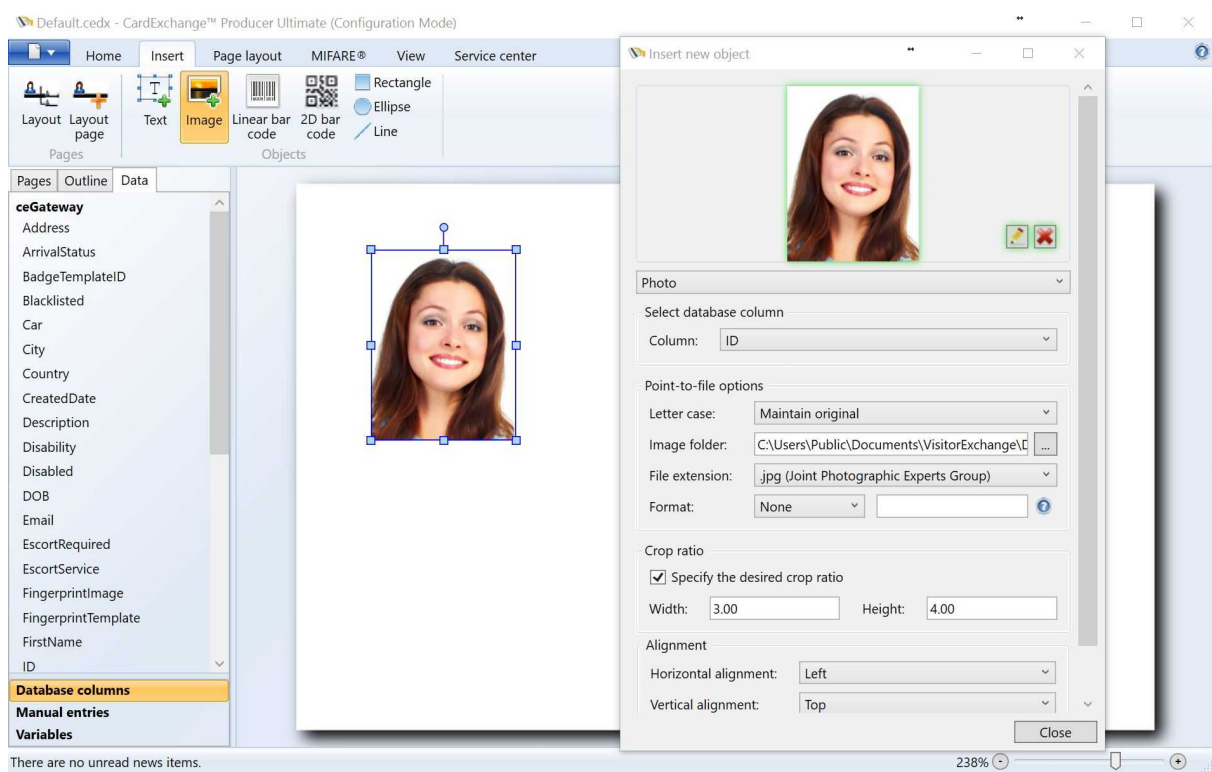
When you hover over the presented image, you will see two buttons appearing. The  button will delete the previewed image, the  button will open the [ImageExchange® Editor](#)⁷² to make change to the image.



More information about using the ImageExchange® Editor can be found in the "[Using Image Editor](#)^[72]" 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](#)^[202] section of this Help file for more information about specific use of functionality.


7.12.2.1 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](#)"²⁴³ 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 be 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.

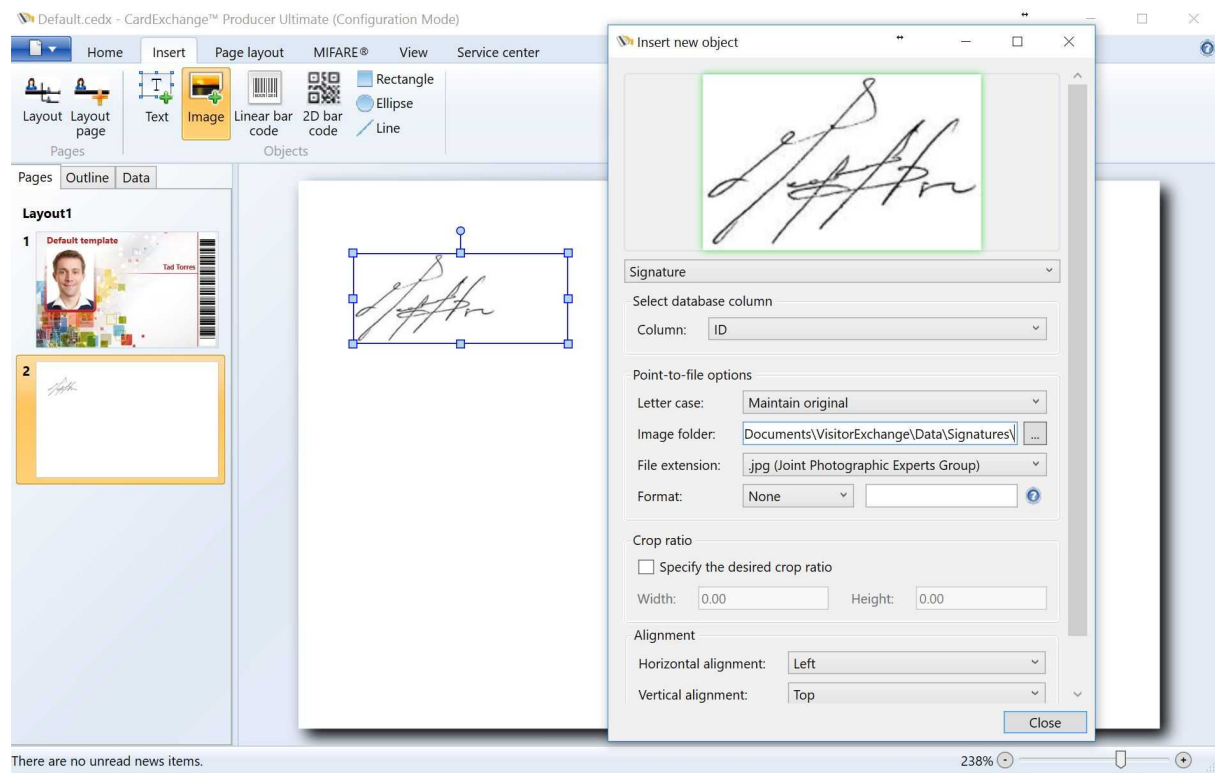
You can also set the format of the value coming from the database so you know for sure there is no mismatch.

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](#)²⁰² section of this Help file.

7.12.2.2 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](#)²⁴³" 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

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.

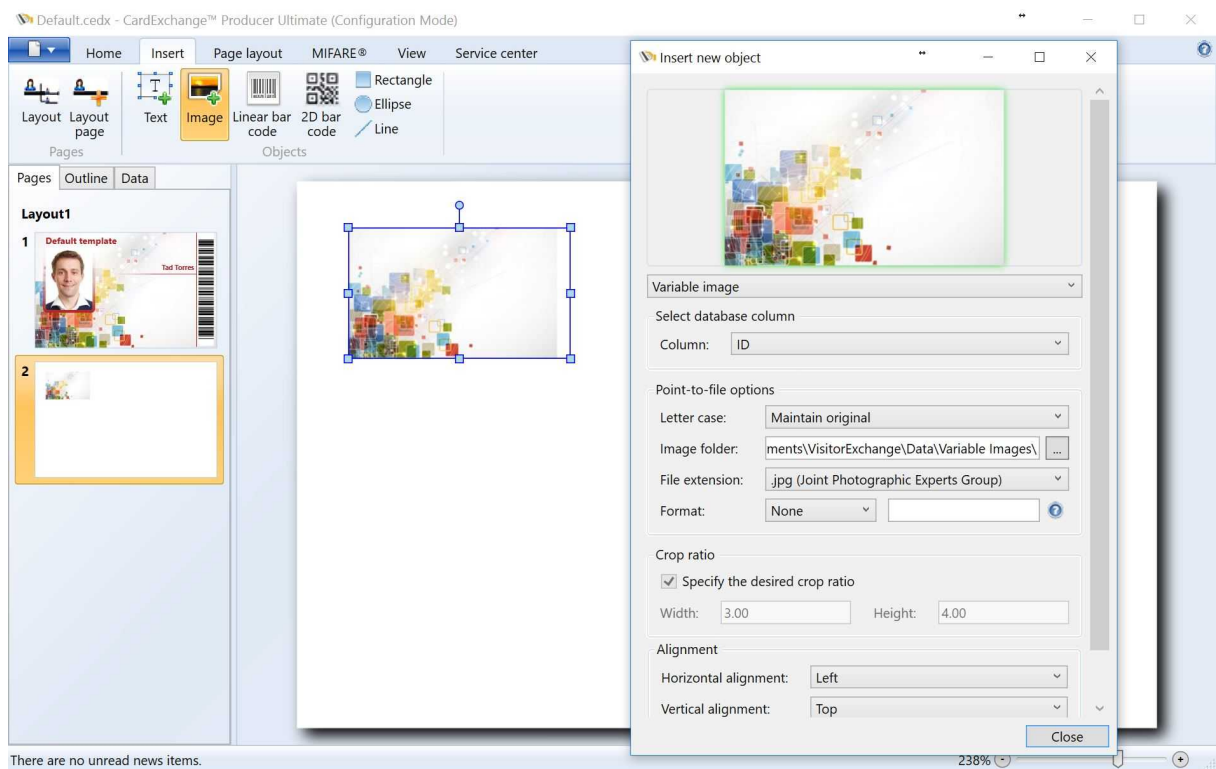
You can also set the format of the value coming from the database so you know for sure there is no mismatch.

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](#)²⁰² section of this Help file.

7.12.2.3 Variable Image(s)


IMPORTANT! This Variable Image option is available from Premium editions and higher!



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](#)²⁴³" 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.

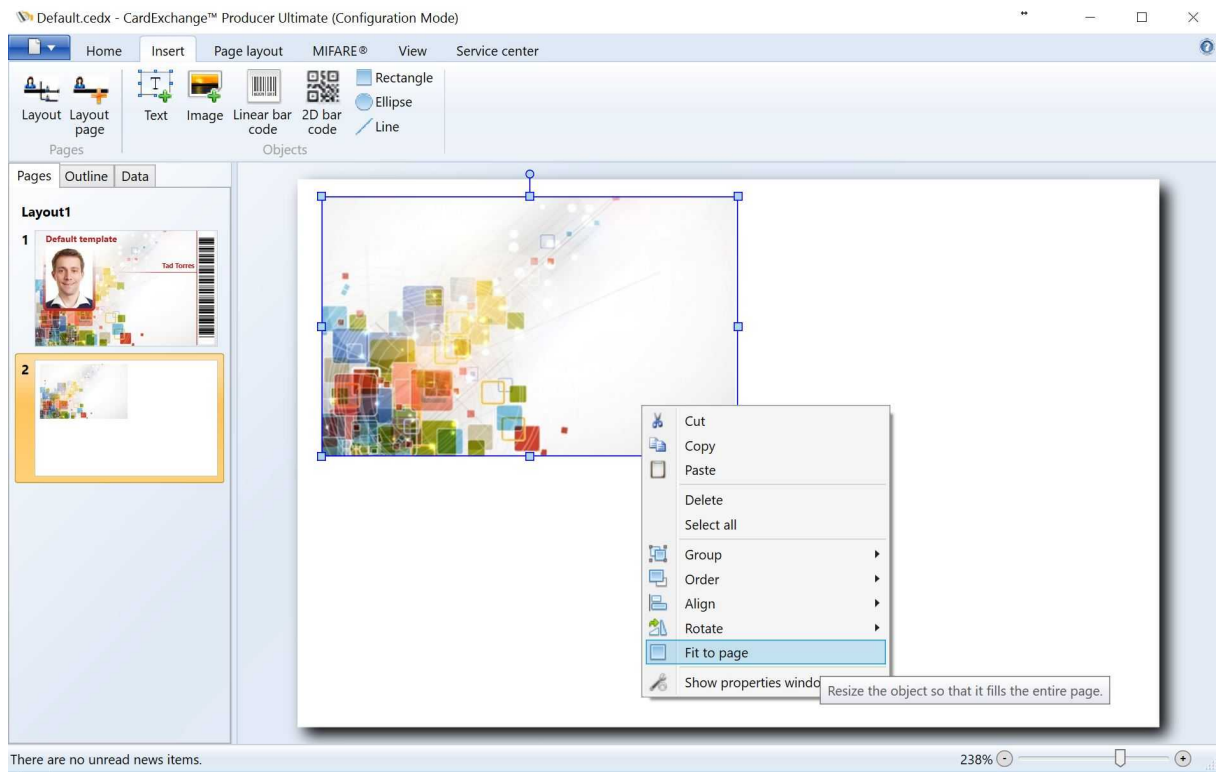
You can also set the format of the value coming from the database so you know for sure there is no mismatch.

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](#)²⁰² section of this Help file.

7.12.2.4 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.



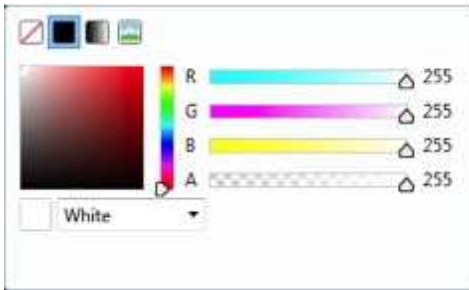
A better way to go is using the Background functionality offered in the Page Layout tab.



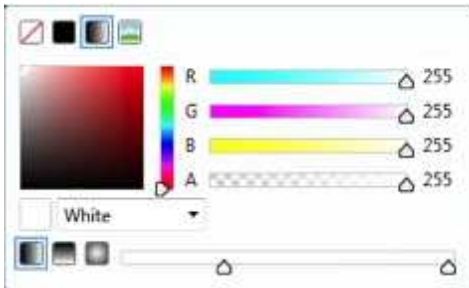
When you click on the Background button, four options are offered.



Use no color or image...



Choose from a one solid color...



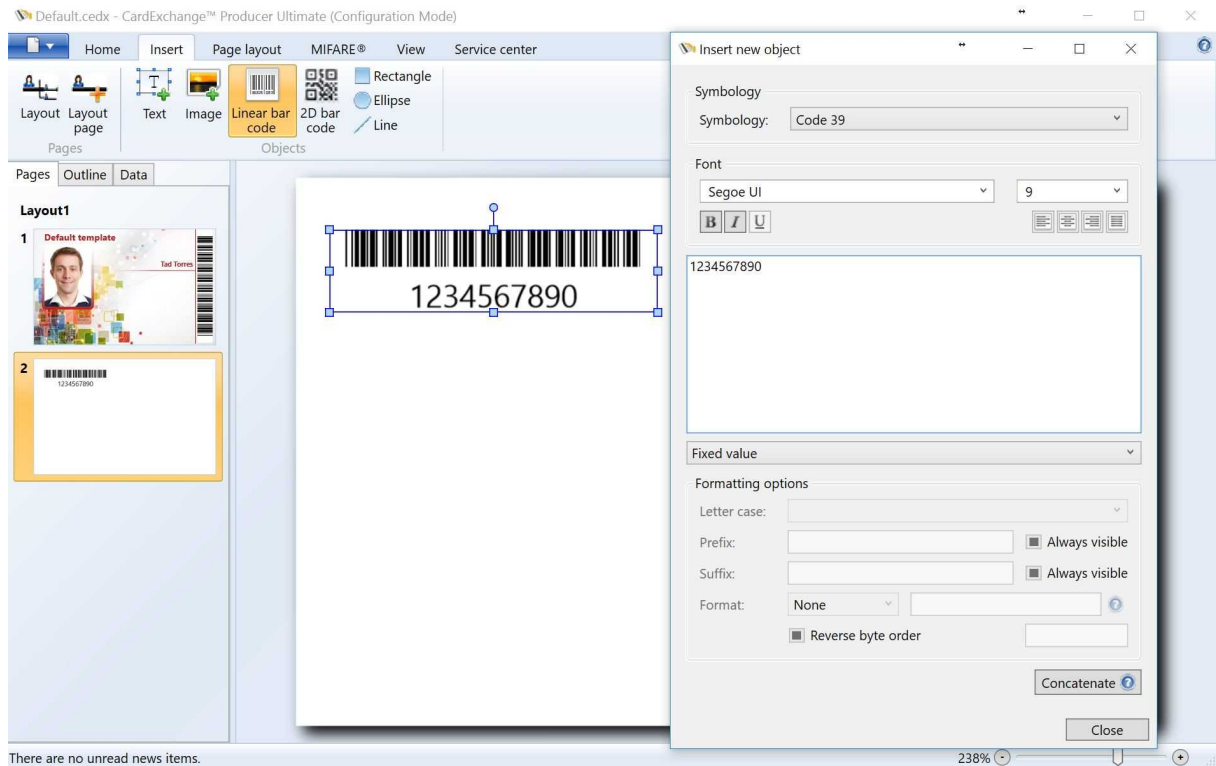
Use a Gradient color...



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.

7.12.3 1D Barcode



To add a 1D barcode object to your 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](#)"²⁵⁸ section of this help file.

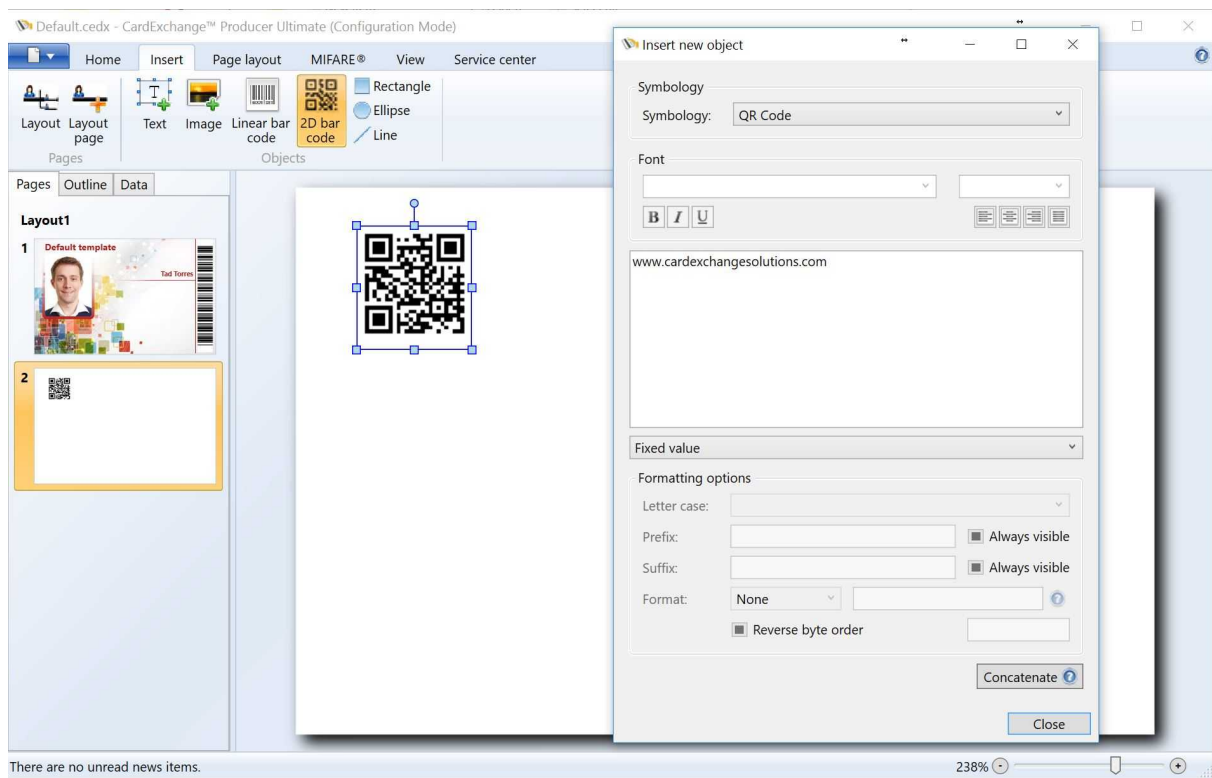
Of course a lot of extra options are available for the 1D Barcodes but they need to be accessed via the [Properties](#)"²⁰² window of the Designer. When the properties window is opened, select the Content tab.

The screenshot shows the 'Properties' dialog box for a barcode. The 'Content' tab is selected. The 'Symbology' is set to 'Code 39'. The 'Wide-to-narrow ratio' is set to '3'. The 'Add checksum' checkbox is checked and highlighted with a red box. Below this, the 'More options...' section is expanded, showing several sub-sections: 'Appearance' (DPI: 300, Smoothing mode: None), 'Codabar options' (Codabar checksum algorithm: Modulo 9, Codabar start symbol: A, Codabar stop symbol: A), 'Code-128 options' (Code 128 alphabet: Auto), 'ISBN options' (ISBN auto caption: checked), and 'Other options' (Supplement space: 5, Draw inter-character gap: unchecked). A red box highlights the entire 'More options...' section. The 'Close' button is at the bottom right.

You can add a checksum, set the options for specific barcodes like Codabar, Code-128, etc.

7.12.4 2D Barcode

IMPORTANT! This 2D Barcode option is available from Premium editions and higher!



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](#)^[258]" 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](#)^[202] window of the Designer. When the properties window is opened, select the Content tab.

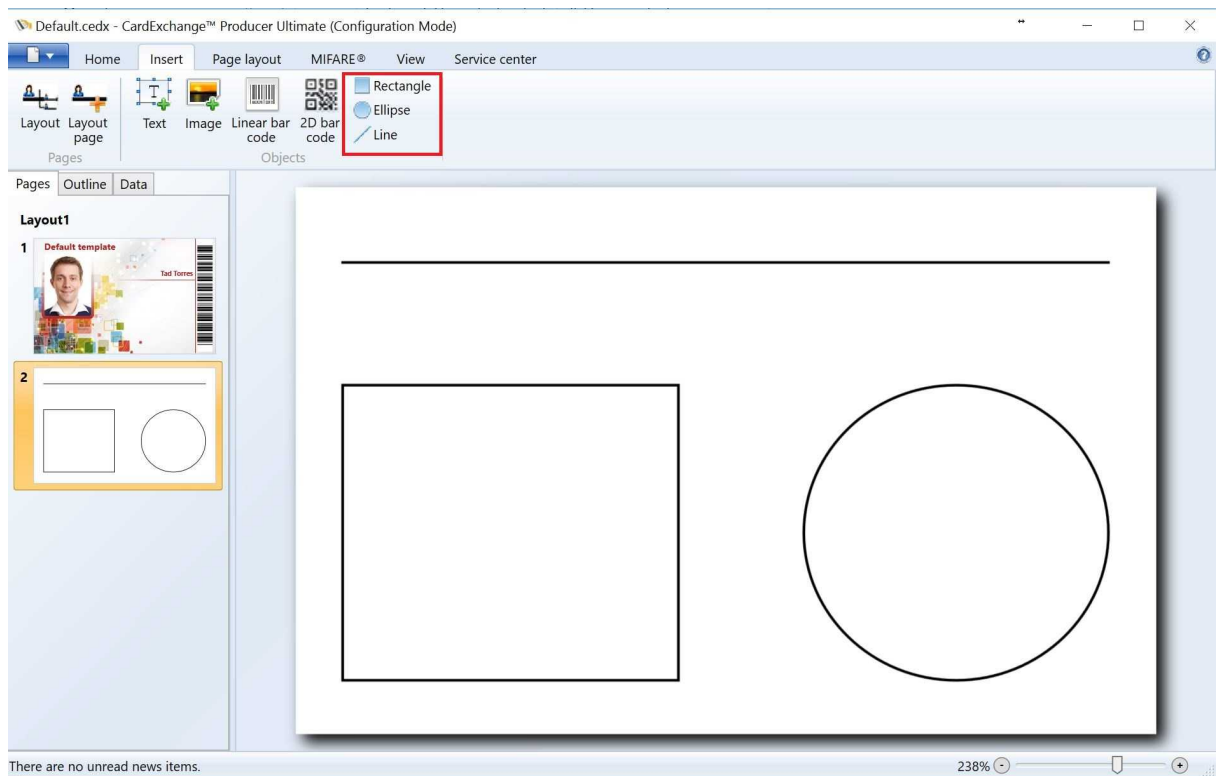
The screenshot shows the 'Properties' dialog box for CardExchange. The 'More options...' section is highlighted with a red border. This section contains several sub-sections with various settings:

- Appearance**
 - DPI: 300
 - Smoothing mode: None
- Aztec options**
 - Aztec error correction level: Auto
 - Aztec symbol size: 0
- Data-Matrix options**
 - Data Matrix compaction mode: Auto
 - Data Matrix size: Auto square size
- PDF417 options**
 - PDF417 error correction level: Auto
 - PDF417 minimum column count: 0
 - PDF417 file ID: 0
 - ☐ PDF417 create macro
 - PDF417 segment index: 0
 - ☒ PDF417 last segment
- QR-code options**
 - QR encode hint: Mode 8
 - QR error correction level: Low
 - QR version: 0

A 'Close' button is located at the bottom right of the dialog box.

Just like with the 1D barcodes, a lot of specific 2D barcode options can be set.

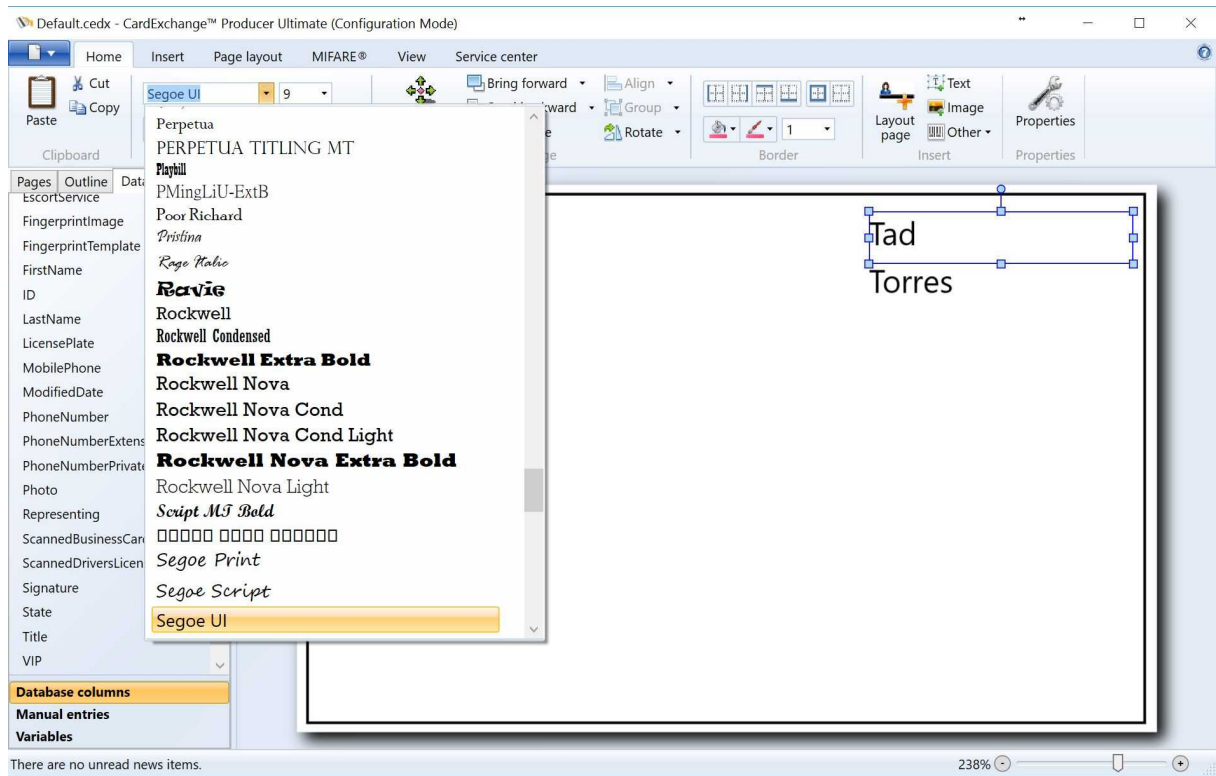
7.12.5 Drawing Objects



Select the Line, Rectangle, or Ellipse button to add it to the page.

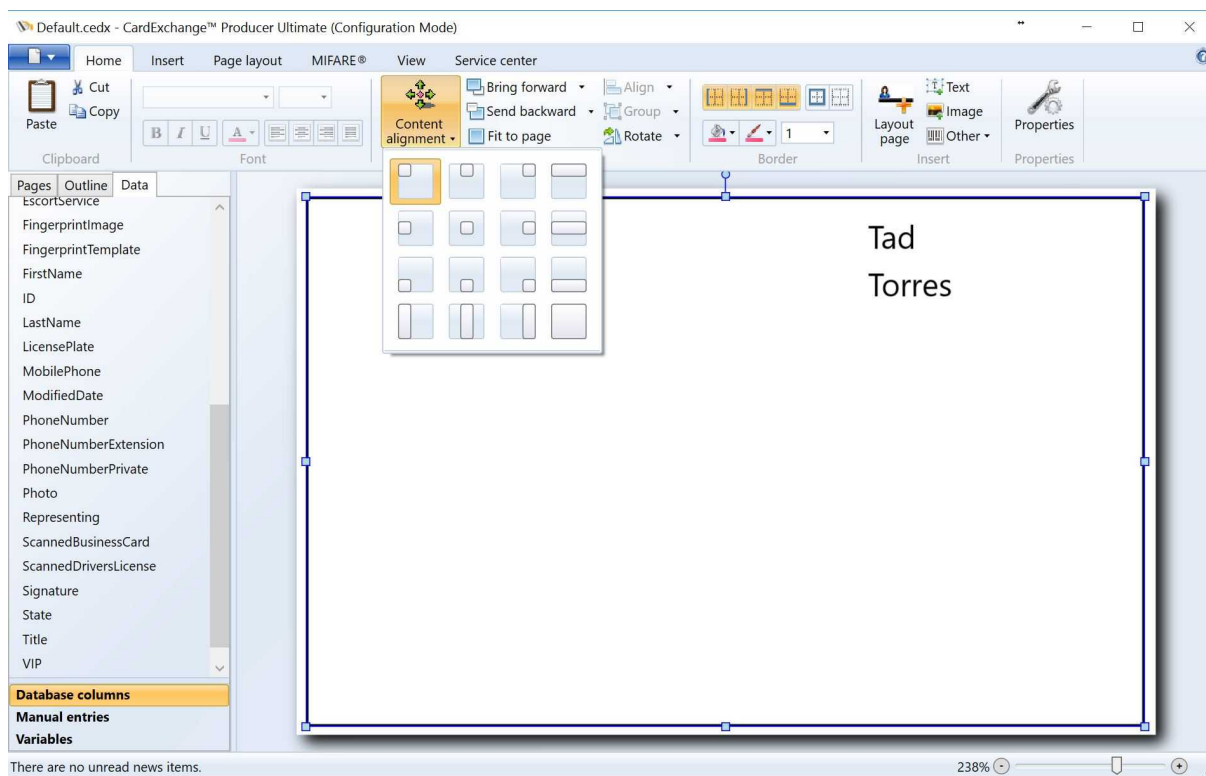
Check for more options like colors, borders, visibility, etc., the [Properties](#) ²⁰² section of this Help file.

7.12.6 Formating Objects



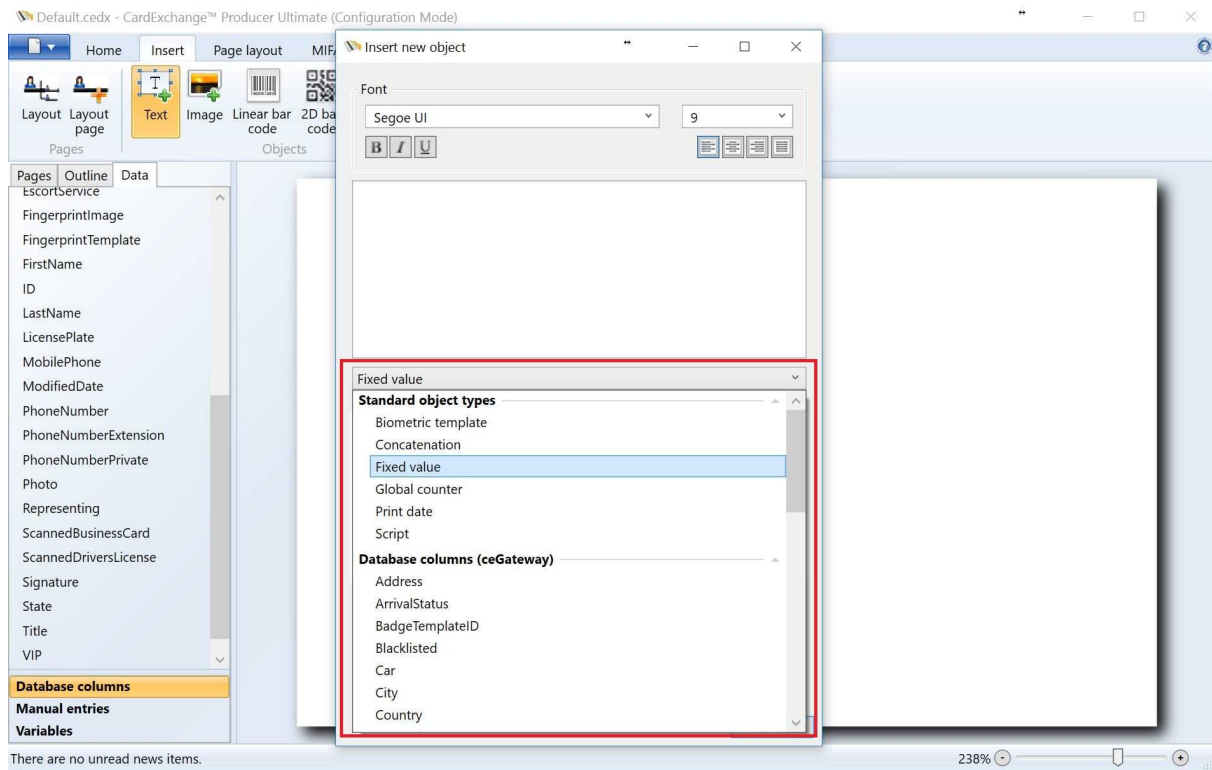
In the Home tab you can select the font, font size and font color that you want to use for your object. For more information about formatting of objects, please see our "[Properties](#)" section of this Help file.

7.12.7 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.

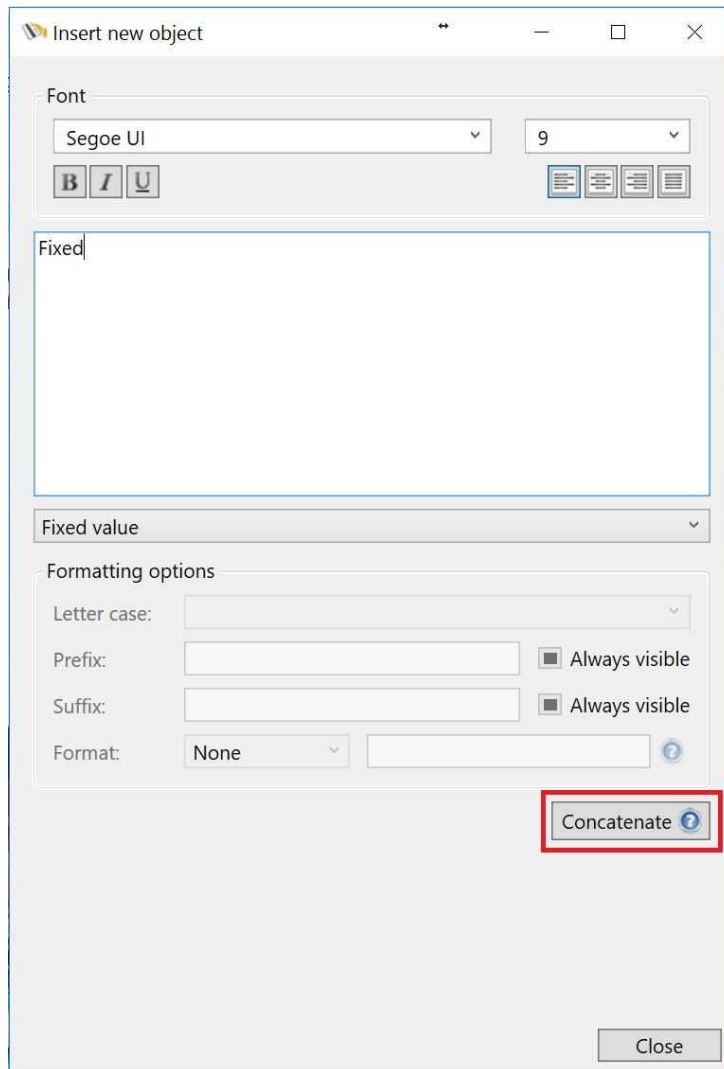
7.13 Standard Object Types



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](#) ²⁰⁴ tab in the [Properties](#) ²⁰² window.

7.13.1 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](#)²⁴² to our [Page](#)²³⁹ 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.

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:

The screenshot shows a configuration window for a 'Concatenation field'. At the top, there are two buttons labeled 'Concatenation field:' with a downward arrow and an upward arrow, both highlighted with red boxes. Below these is a dropdown menu set to 'Fixed value'. Underneath is a text input field containing 'with Concatenate' and a red 'X' icon. A section titled 'Formatting options' contains several controls: a 'Letter case:' dropdown, 'Prefix:' and 'Suffix:' text input fields each with an 'Always visible' checkbox, and a 'Format:' dropdown set to 'None' with an adjacent text input field and a help icon. At the bottom left is a checked checkbox 'Separate fields with spaces', and at the bottom right is a 'Concatenate' button with a help icon. A thick red vertical line is positioned on the left side of the window.

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](#)^[202] window at the [Content](#)^[204] section.

7.13.2 Fixed Value

Insert new object

Font

Segoe UI 9

B *I* U

Enter text here when fixed value is chosen...

Fixed value

Formatting options

Letter case: [v]

Prefix: [] ☒ Always visible

Suffix: [] ☒ Always visible

Format: None [v] [?]

Concatenate [?]

Close

Select **Fixed Value** from the **Standard Object Type** drop down menu, indicated with the **red rectangle** and enter the text into the text area.

7.13.3 Global Counter

Insert new object

Font

Segoe UI 9

B *I* U

30

Global counter

Formatting options

Letter case: Maintain original

Prefix: ☐ Always visible

Suffix: ☐ Always visible

Format: Integer d [?](#)

Global-counter options

Next value to be printed: 30

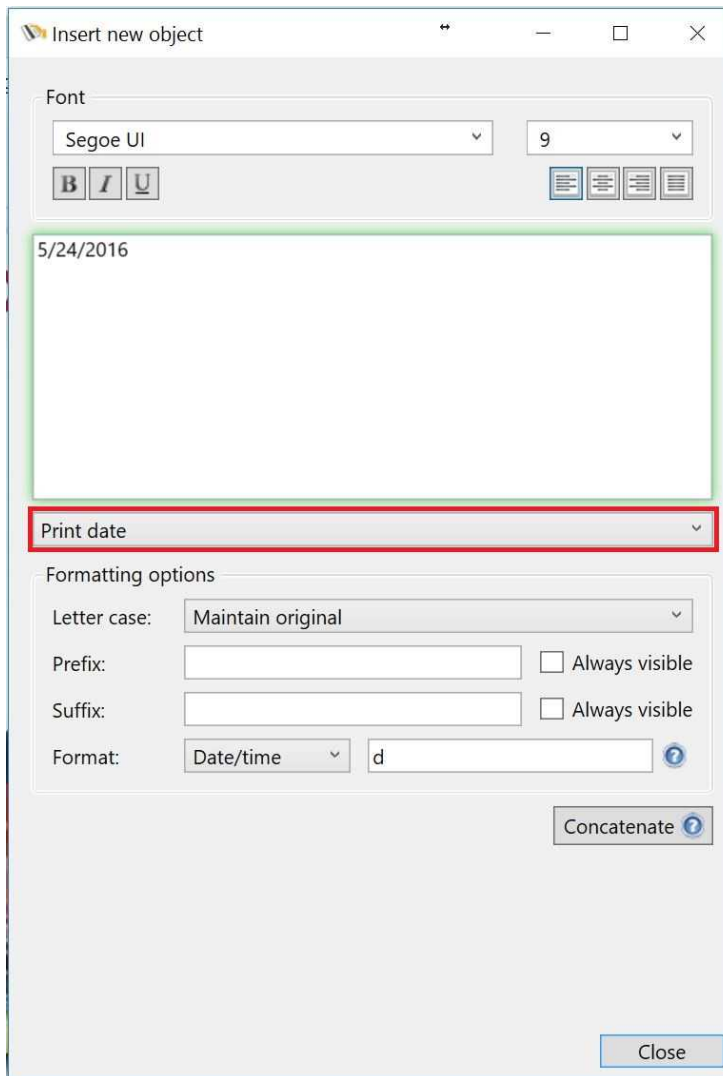
Increment value: 1

[Concatenate](#) [?](#)

[Close](#)

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.

7.13.4 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.

7.13.5 Script

Insert new object

Font

Segoe UI 9

B *I* U

48

Script

12 + 24 + 12

Formatting options

Letter case: Maintain original

Prefix: ☐ Always visible

Suffix: ☐ Always visible

Format: None ?

☐ Reverse byte order 7

Concatenate ?

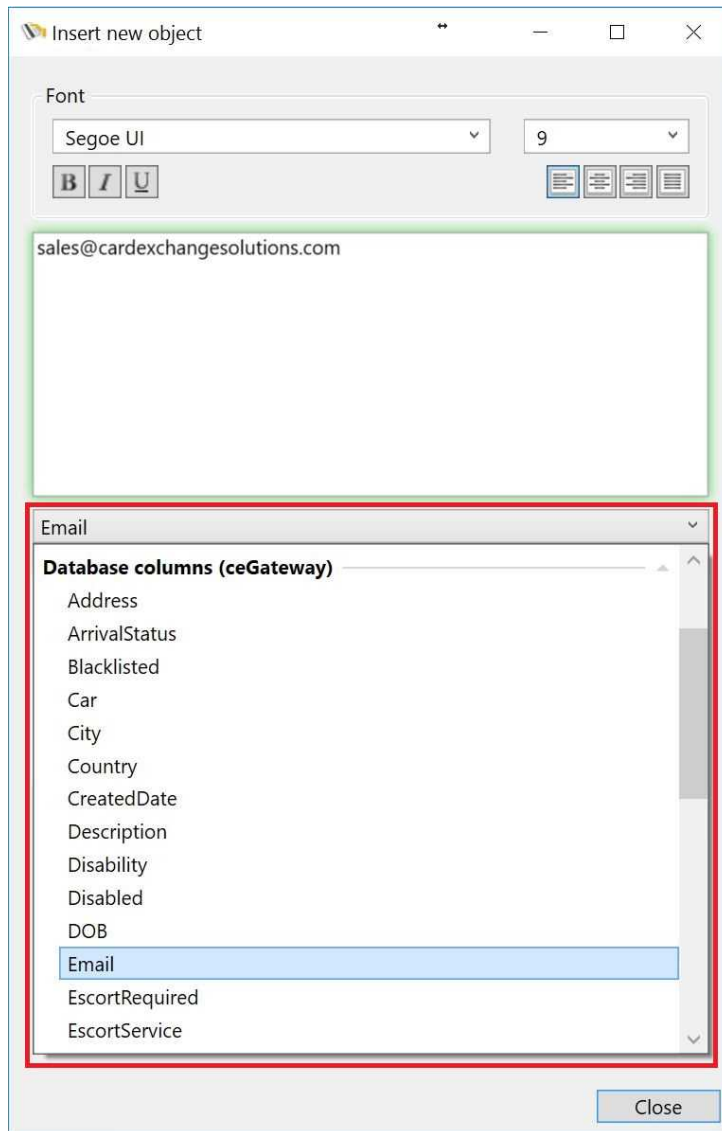
Close

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.

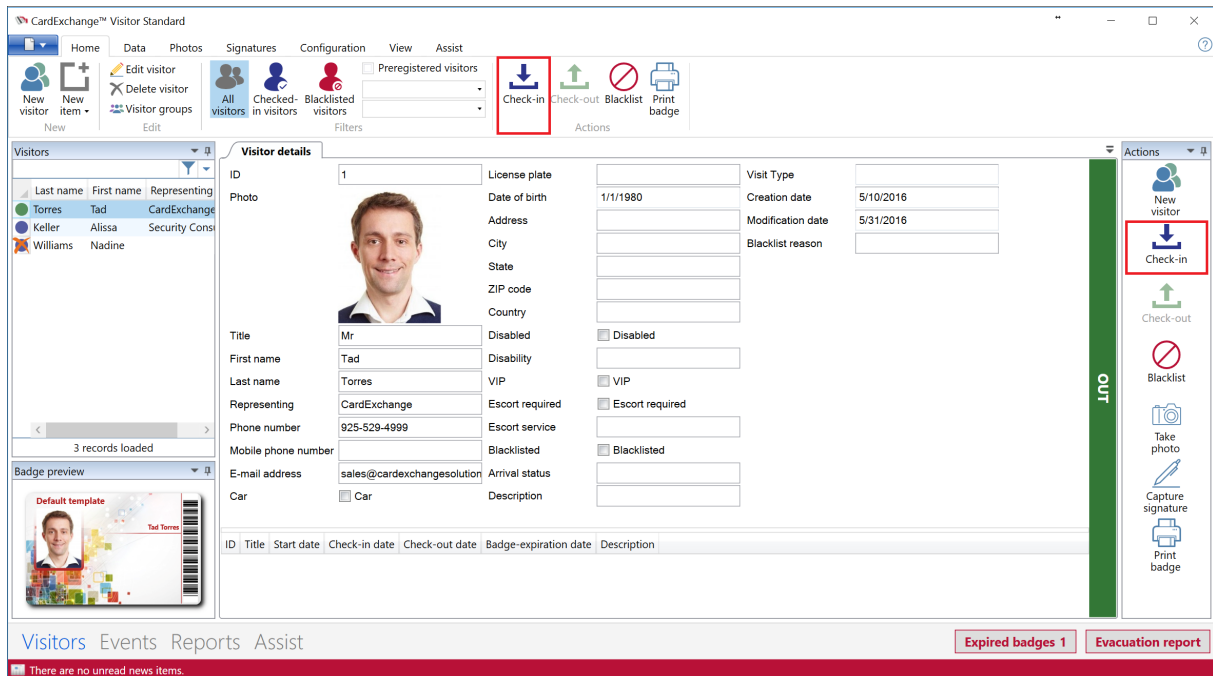
7.13.6 Database Columns



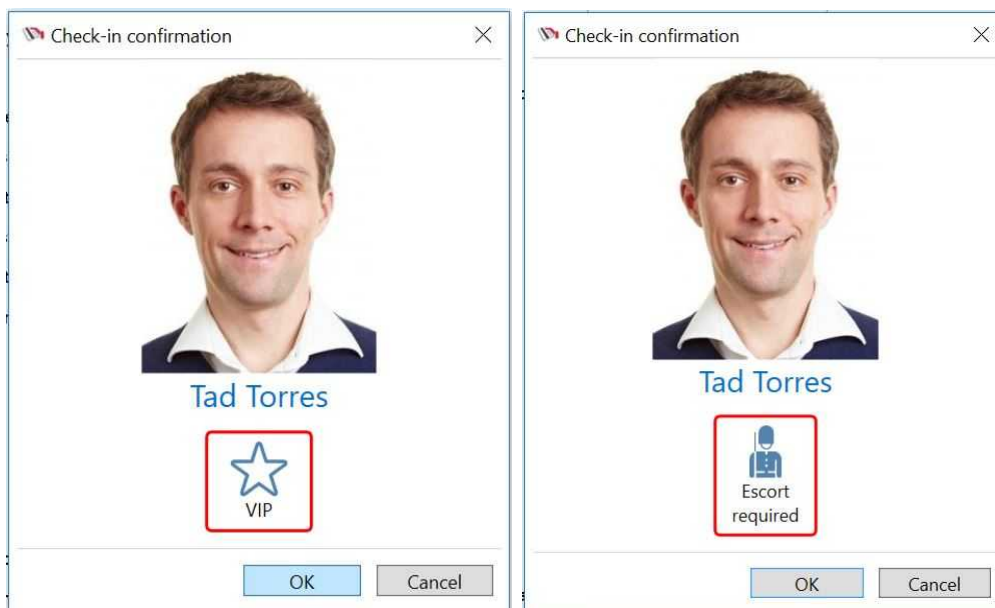
In the **Standard Object Type** drop down menu, all the database columns are available for selecting.

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.

8 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.



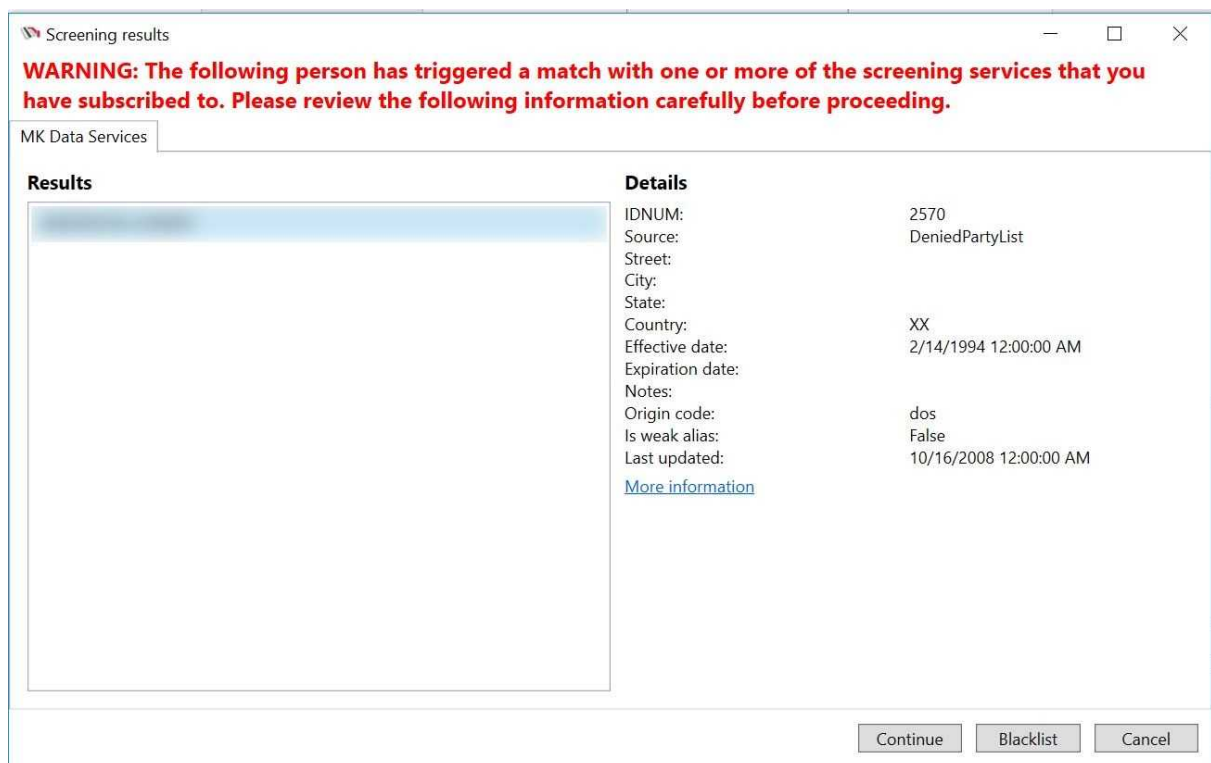


If either option is checked then the corresponding prompt above is displayed, or the prompt containing both if they are both checked. You can then either click ok to continue, or cancel to arrange the escort before checking them in.

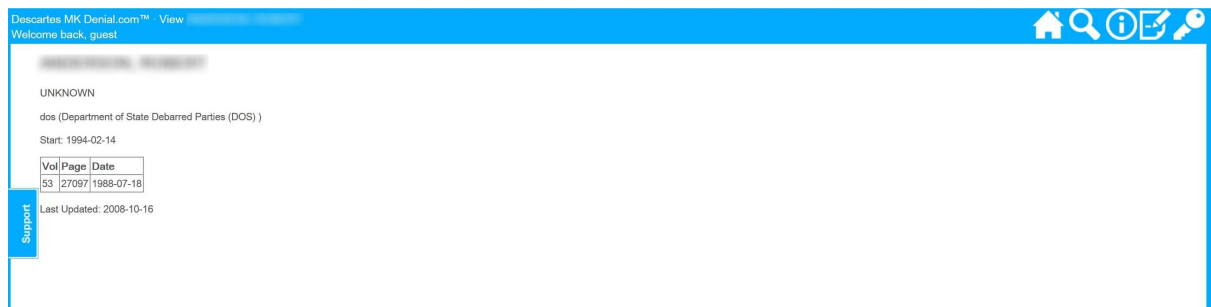
8.1 Visitor Screening

CardExchange® Visitor Business Edition is offering visitor screening via criminal and sex offender database systems of Amber Road and MK Data Services. For details on configuring this please see the [Visitor Screening](#)^[98] section of this manual.

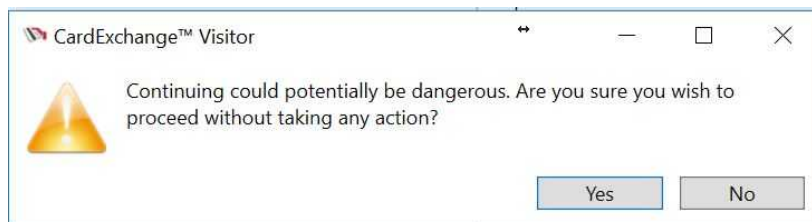
Before a visitor is checked in, information of the visitor will be sent to the screening services and when a possible match is made, the window below will be show:



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.



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.



8.2 Document Signing

Check-in
Sign documents
Please review and sign the following documents to check-in. Document 1 of 1: Visitor NDA

CardExchange SOLUTIONS

VISITOR AGREEMENT

This Visitor Agreement for John Smith Agreement (the "Amendment") is effective Saturday, September 10, 2016 (the "Effective Date"),

BETWEEN: CardExchange Solutions Inc. ("CARDEXCHANGE"), a company organized and existing under the laws of the United States with its principal office located at 201 Sand Creek Road, Brentwood, CA 94514

AND: John Smith (the "VISITOR"), a person existing under the laws of the United States.

On Saturday, September 10, 2016, CARDEXCHANGE and VISITOR (collectively the "Parties") entered into a Visitor Agreement (the "Agreement"). The Parties hereby agree that the Agreement is as follows:

The following provision shall and hereby does activate Section 2.4 of the Agreement in its entirety:

2.4 POLICIES

VISITOR agrees to comply with CARDEXCHANGE's written policies, as such policies are amended from time to time. VISITOR acknowledges, understands and agrees that failure to comply with CARDEXCHANGE's written policies may result in immediate removal by CARDEXCHANGE.

IN WITNESS WHEREOF, the VISITOR has executed this agreement on the date first set forth above.

John Smith

X

Print Sign

Cancel < Back Next > Finish

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.

Print

Cancel < Back Next > Finish

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\

9 Expired Badges

The screenshot shows the CardExchange Visitor Standard application. The main window has a menu bar (Home, Data, Photos, Signatures, Configuration, View, Assist, Edit visitor) and a toolbar with icons for Find, Scan search, Refresh data, Select all, New, Delete visitor, Save, Cancel, Back, Scan document, and ID scan. The left sidebar shows a list of visitors with columns for ID, Last name, First name, and Representing. The main area displays 'Visitor details' for Nadine Williams, including fields for ID, Photo, E-mail address, Car, License plate, Date of birth, Address, City, State, ZIP code, Country, Disabled, Disability, VIP, Escort required, Escort service, and Blacklisted. The bottom right corner of the main window has a red bar with the text 'Expired badges 1' and 'Evacuation report'.

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.

The 'Expired badges' window displays a list of expired badges and details for the selected badge. The top section has a 'Check-out' button and a 'Extend expiration time by' section with options: Thirty minutes, One hour, One and a half hours, Two hours, and Custom date and time. The 'Events' table shows the following data:

ID	Title	Start	End
2	Sample Event	5/24/2016 10:51:00 AM	5/24/2016 10:54:00 AM

The 'Invitees' section shows details for Nadine Williams:

- Check-in date: 5/24/2016 10:50:56 AM
- Expiration date: 5/24/2016 10:54:00 AM
- New expiration date: (empty field)

The 'Invitee Details' section shows the following information:

- Phone number: 123-456-7890
- Phone number extension: (empty field)
- Private phone number: (empty field)
- Mobile phone number: 123-456-7890
- Email address: 123@abc.com

At the bottom, it states: 'Last refreshed on: 5/24/2016 10:58:07 AM' and 'Total number of expired badges: 1'.

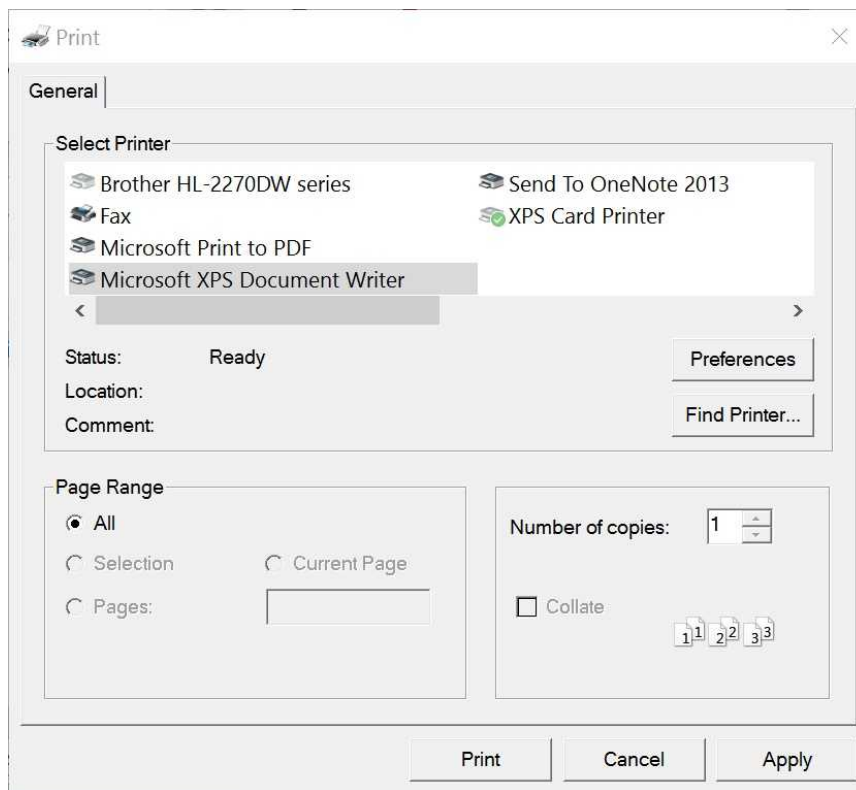
Here you can select one or more visitors and either check them out if you know that they have left, or select a time period to extend they stay by. Some details are also shown for the invitee so that you can try to contact them if needed. Once you are done click on Apply to save the changes.

10 Evacuation Report

The screenshot displays the CardExchange Visitor Standard application window. The interface includes a menu bar (Home, Data, Photos, Signatures, Configuration, View, Assist, Edit visitor), a toolbar with various actions like Find, Scan search, Refresh data, Select all, New, Delete visitor, Save, Cancel, Back, Scan document, and ID scan, and a main workspace. The workspace is divided into several sections: a 'Visitors' list on the left, a 'Visitor details' form in the center, and an 'Actions' panel on the right. The 'Visitors' list shows three records: 1. Torres, Tad (CardExchange), 2. Keller, Alissa (Security Consulta), and 3. Williams, Nadine. The 'Visitor details' form for Nadine Williams is filled out with various fields like ID, Photo, E-mail address, Car, License plate, Date of birth, Address, City, State, ZIP code, Country, Disabled, Disability, VIP, Escort required, Escort service, and Blacklisted. The 'Actions' panel includes buttons for New visitor, Check-in, Check-out, Blacklist, Take photo, Capture signature, and Print badge. At the bottom of the window, there is a status bar with a red background that says 'There are no unread news items.' and two buttons: 'Expired badges 1' and '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.



Clicking the Evacuation report button will prompt you with the print dialog window for you to select the desired printer, all printers on the system appear so you can print to any printer you have.

Evacuation report

Tuesday, May 24, 2016 11:09 AM

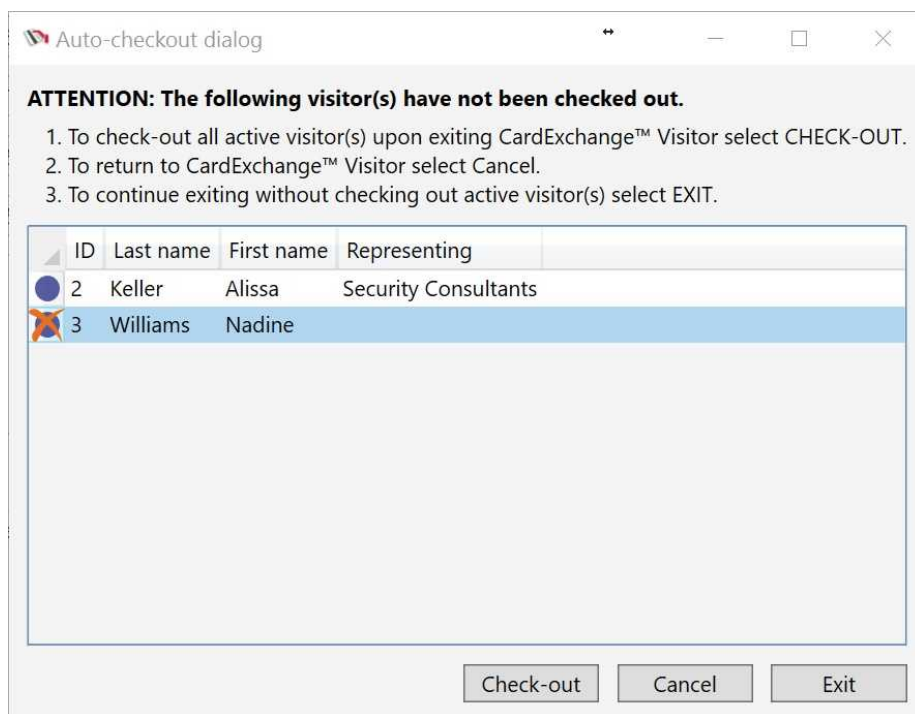
There are 2 people in the building!

#	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

11 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.

12 KIOSK Client



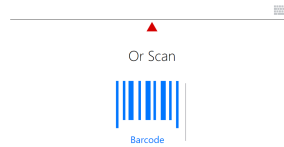
Starting from the CardExchange® Visitor Business edition it is also possible to use the CardExchange® Visitor KIOSK Client. This is a stand-alone KIOSK application for self check-in and check-out by visitors.

12.1 Check-In

4:26 PM
09/29/2016

Start here

To check-in or check-out
Enter a barcode number...



1	2	3	4	5	6	7	8	9	0	
q	w	e	r	t	y	u	i	o	p	Delete
a	s	d	f	g	h	j	k	l	@	.
⬅	z	x	c	v	b	n	m	➡	Done	
Space										

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.

1

2

3

4

5

Event details

Next

EVENT DETAILS

Badge expiration date	Earliest check-in allowed	End	First name	Last name	Start	Event description	Event title	Full name
9/29/2016 6:30:00 PM	9/29/2016 4:30:00 PM	9/29/2016 6:00:00 PM	Elliott	Davis	9/29/2016 5:00:00 PM	Document Test Event	Document Test	Elliott Davis

If a valid barcode number is either scanned or entered, the details of the event are displayed on the screen.

Visitor details

PLEASE SUBMIT THE FOLLOWING IMAGES

Photo

DO ANY OF THESE APPLY TO YOU?

☒ Car ☐ Disabled ☐ MP ☐ Escort required

PERSONAL DETAILS

First name Elliot	Middle name	Last name Davis	Second last name	Accounting CardExchange Solutions	Phone number +44 203 808 9337	Phone number extension 230	Private phone number	Mobile phone number +44 7740 190547
E-mail address elliot@cardexchangesolutions.com	License plate GD57 LDX	Date of birth 10/2/1976 12:00:00 AM	Address	City	State	ZIP code	Country	Disability

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.

Required Documents

DOCUMENTS

CardExchange SOLUTIONS

VISITOR AGREEMENT

This Visitor Agreement for Elliot Davis Agreement (the "Amendment") is effective Saturday, September 10, 2016 (the "Effective Date").

BETWEEN: CardExchange Solutions Inc. ("CARDEXCHANGE"), a company organized and existing under the laws of the United States with its principal office located at 201 Sand Creek Road, Brentwood, CA 94515.

AND: Elliot Davis (the "VISITOR"), a person existing under the laws of the United States.

On Saturday, September 10, 2016, CARDEXCHANGE and VISITOR (collectively the "Parties") entered into a Visitor Agreement (the "Agreement"). The Parties hereby agree that the Agreement is as follows:

The following provision shall and hereby does activate Section 2.4 of the Agreement in its entirety:

2.4 POLICIES

VISITOR agrees to comply with CARDEXCHANGE's written policies, as such policies are amended from time to time. VISITOR acknowledges, understands and agrees that failure to comply with CARDEXCHANGE's written policies may result in immediate removal by CARDEXCHANGE.

IN WITNESS WHEREOF, the VISITOR has executed this agreement on the date first set forth above.

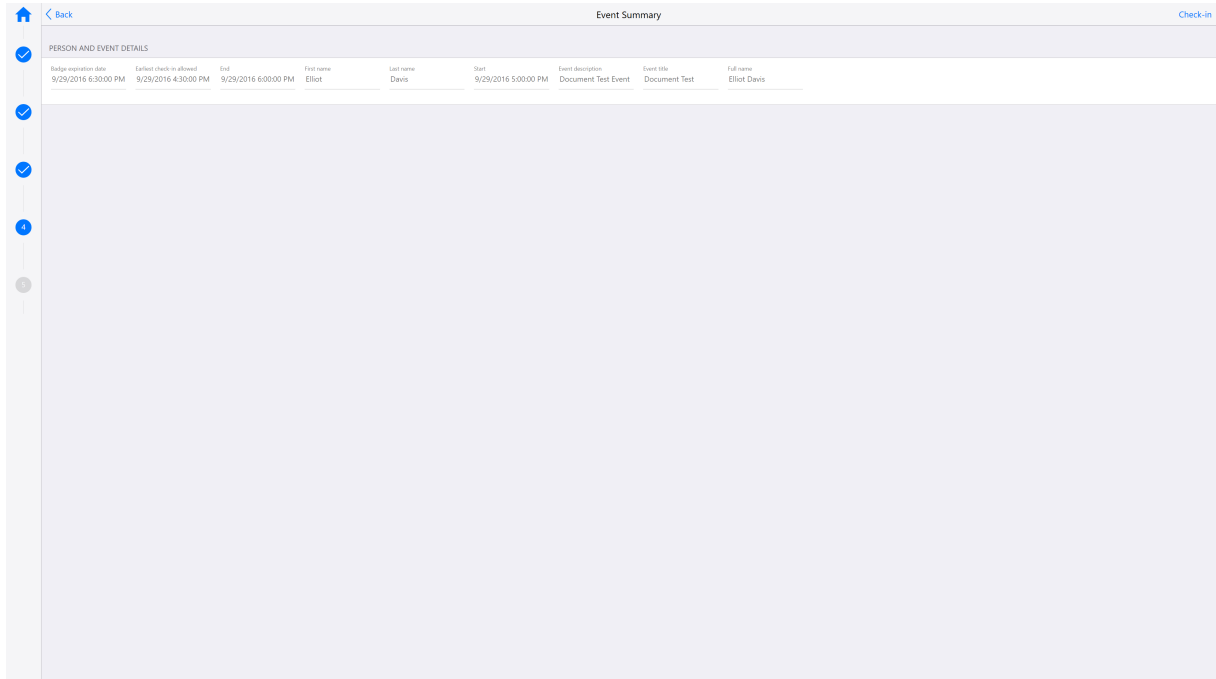
Elliot Davis

X _____

SIGNATURE

Sign above this line

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.

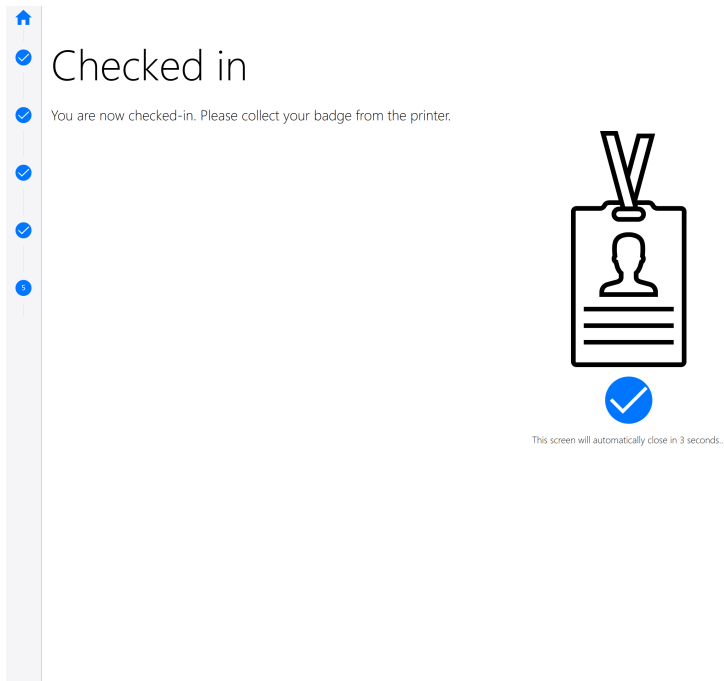


The screenshot shows the 'Event Summary' screen in the Kiosk Client. At the top, there is a navigation bar with a home icon, a 'Back' button, the title 'Event Summary', and a 'Check-in' button. Below the navigation bar is a section titled 'PERSON AND EVENT DETAILS'. This section contains a table with the following data:

Badge expiration date	Earliest check-in allowed	End	First name	Last name	Start	Event description	Event title	Full name
9/29/2016 6:30:00 PM	9/29/2016 4:30:00 PM	9/29/2016 6:00:00 PM	Elliot	Davis	9/29/2016 5:00:00 PM	Document Test Event	Document Test	Elliot Davis

Below the table is a large, empty light blue rectangular area. On the left side of the screen, there is a vertical sidebar with a series of blue circular icons, some of which are checked.

You will then see a summary of the event you are checking in for, to complete the check-in just click on Check-in.



The screenshot shows the 'Checked in' screen in the Kiosk Client. The screen has a light blue background. At the top, there is a navigation bar with a home icon, a 'Back' button, the title 'Checked in', and a 'Check-in' button. Below the navigation bar is a section titled 'Checked in'. This section contains the text: 'You are now checked-in. Please collect your badge from the printer.' Below the text is a large icon of a badge with a person silhouette and a checkmark. Below the icon is a blue circular button with a white checkmark. At the bottom of the screen, there is a small text message: 'This screen will automatically close in 3 seconds...'. On the left side of the screen, there is a vertical sidebar with a series of blue circular icons, some of which are checked.

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.

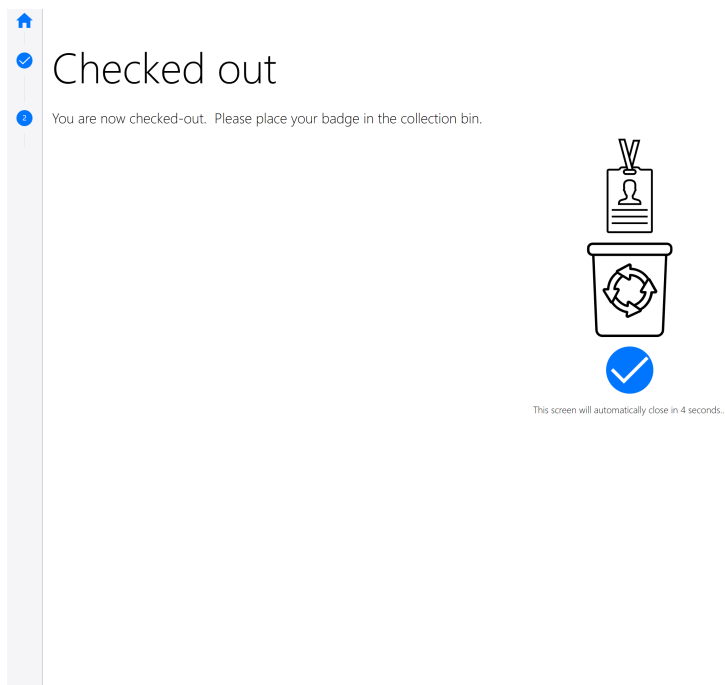
12.2 Check-Out

The screenshot shows the 'Event Summary' screen in the CardExchange Visitor Management System. The screen is divided into two main sections: 'PERSON AND EVENT DETAILS' and a large empty area for additional information or notes. The 'PERSON AND EVENT DETAILS' section contains the following fields:

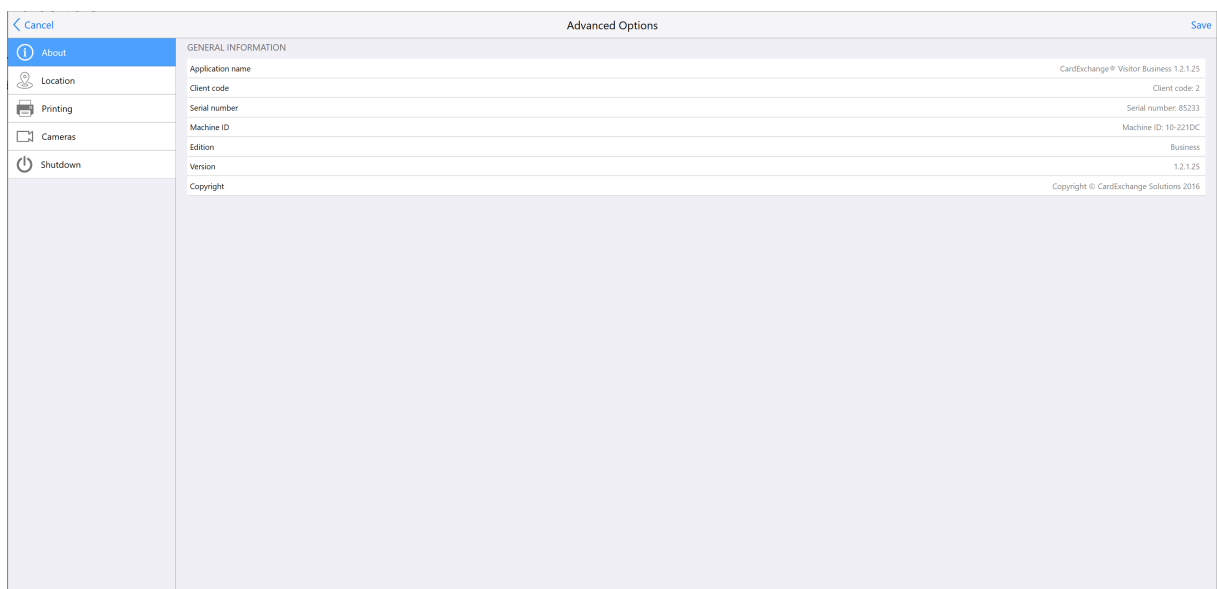
PERSON AND EVENT DETAILS									
Badge expiration date	Earliest check-in allowed	End	First name	Last name	Start	Event description	Event title	Full name	
9/29/2016 6:30:00 PM	9/29/2016 4:15:00 PM	9/29/2016 6:00:00 PM	Craig	Bechelli	9/29/2016 5:00:00 PM		print test	Craig Bechelli	
Middle name	Second last name	Home/office	Phone number	Phone-number extension	Private phone number	Mobile phone number	Email address	License plate	
		CardExchange Solutions					craig@cardexchangesolutions.com		
Date of birth	Address	City	State	ZIP code	Country	Disability	<input checked="" type="checkbox"/> On	<input type="checkbox"/> Disabled	
<input type="radio"/> VP	<input type="radio"/> Escort required								

The 'Check-out' button is located in the top right corner of the screen.

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.



12.3 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](#)⁹⁶ which you can access from the advanced options window in the main CardExchange® Visitor application.

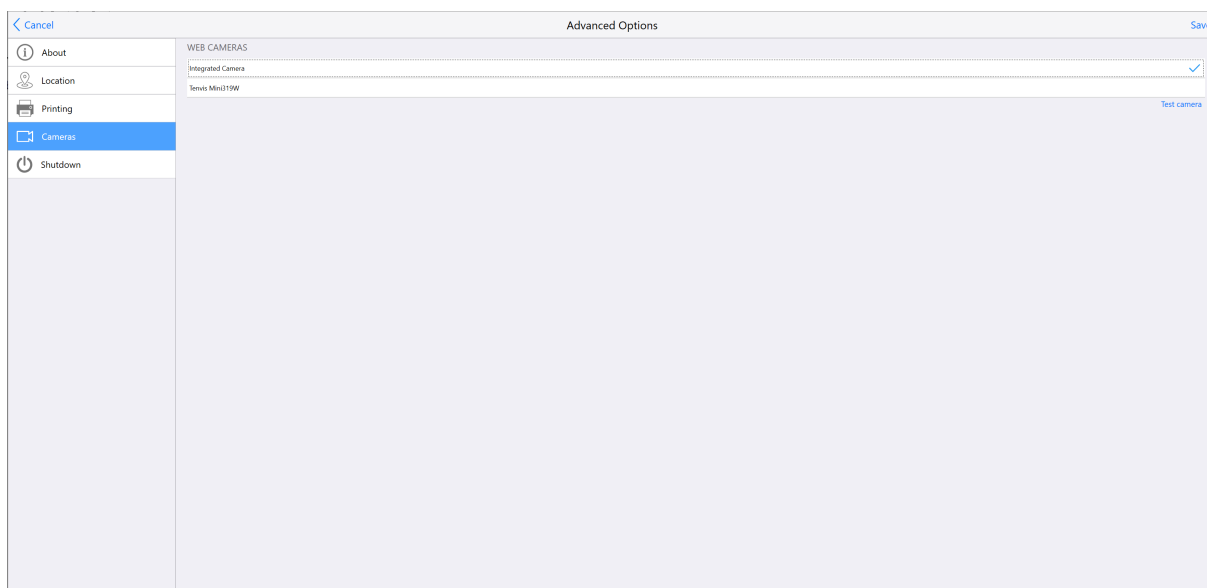
Under the About tab you can see all the detailed information regarding the installed version, Serial number, MachineID, Edition etc...

The screenshot shows the 'Location' tab in the CardExchange Visitor Manual. The left sidebar contains a menu with 'About', 'Location' (selected), 'Printing', 'Cameras', and 'Shutdown'. The main content area is titled 'Advanced Options' and displays a list of locations. Under the 'Building' section, there are three entries: 'Main Building', 'Building A1', and 'Building B2'. Under the 'Lobby' section, there is one entry: 'Main Lobby'. A 'Save' button is located in the top right corner.

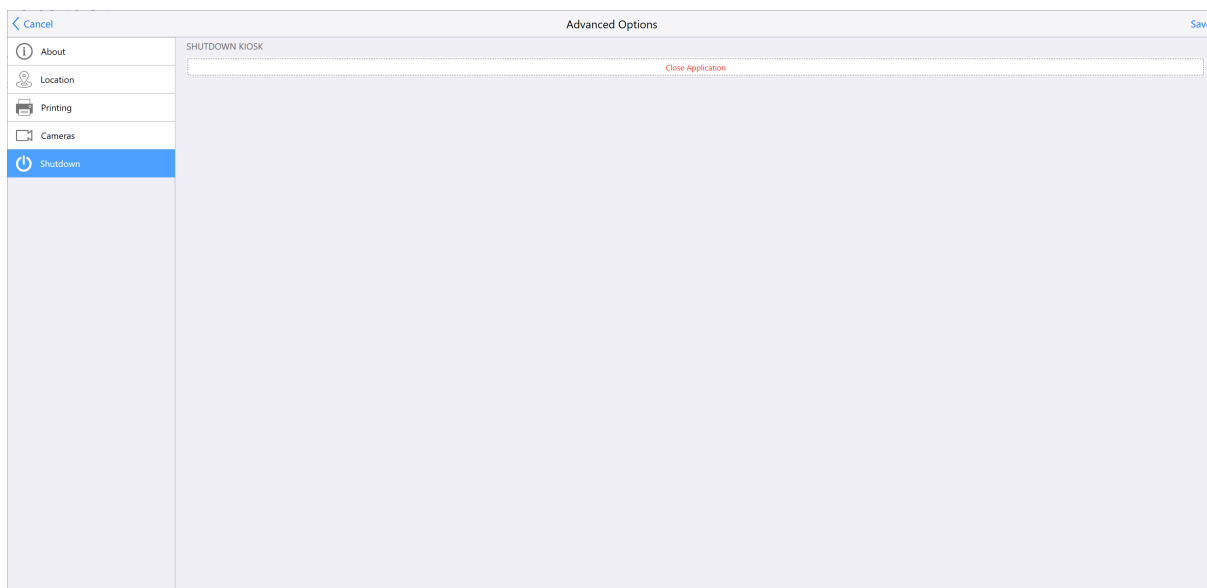
From the location tab you can select the location of the Kiosk client, you can select the current building and lobby.

The screenshot shows the 'Printing' tab in the CardExchange Visitor Manual. The left sidebar contains a menu with 'About', 'Location', 'Printing' (selected), 'Cameras', and 'Shutdown'. The main content area is titled 'Advanced Options' and displays settings for printing. Under the 'BADGE TEMPLATE' section, there is a 'File Location' field with the path 'C:\Users\Public\Documents\VisitorExchange\Templates\VisitorBadge.cedx' and a 'Select' button. Under the 'BADGE PRINTER' section, there are several printer options: 'Zebra ZXP Series 8 USB Card Printer', 'XPS Card Printer', 'Send to OneNote 2013', 'Microsoft XPS Document Writer' (selected with a checkmark), 'Microsoft Print to PDF', 'Magcard Hello (V2)', and 'Fax'. Under the 'DOCUMENT PRINTER' section, there are several printer options: 'Zebra ZXP Series 8 USB Card Printer', 'XPS Card Printer', 'Send to OneNote 2013', 'Microsoft XPS Document Writer' (selected with a checkmark), 'Microsoft Print to PDF', 'Magcard Hello (V2)', 'Fax', and 'Brother HL-2270DW series'.

Under the printing tab you can select the location for the badge template to be used, the badge printer and the document printer.



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.