WorldCard Team - Windows Server Edition Administrator Manual

Versio: v1.2

Relesae: March, 2018

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There may be newer versions of the software that was released during or after this product's manufacturing date. If the content in the User Manual differs from the on-screen interface, please follow the instructions on the on-screen interface instead of the User Manual.

History

<u>v1.2.0</u>

• March, 2018	
Add JRE download instructions.	Page.1-2
Revise JRE set up instructions.	Page.2-1
• Year 2017, first version.	

Chapter 1 Server Build Requirements

1.1 Hardware Specifications

The following is the minimum required hardware specifications:

- Processor: 1.6GHz Quad-Core processor.
- Memory: 8GB.
- Hard Disk: 1TB capacity. It is recommended to build up RAID 1 type to protect data.

1.2 Operating System

Choose one of the following supported versions of operating system to use:

- Microsoft Windows Server 2012 (64 bit).
- Microsoft Windows Server 2012 R2 (64 bit), or later.
- Microsoft Windows 7 Service Pack 1 (64 bit), or later.

1.3 Database Software

Choose one of the following supported database software to use:

- Microsoft SQL Server 2012 (32/64 bit).
- Microsoft SQL Server 2014 (32/64 bit).
- Microsoft SQL Server 2016 (64 bit).
- Microsoft SQL Server 2017 (64 bit).
- PostgreSQL 9.2, 9.3, 9.4, 9.5, 9.6, 10.

Note: Microsoft SQL Server Express version is not supported.

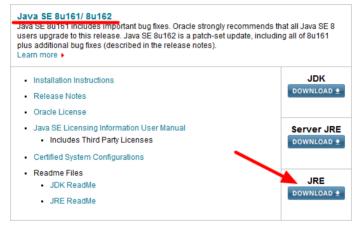
1.4 Essential Environment Kits

Please install the following essential environment kits:

- Java SE Runtime Environment 8 (JRE)
- Microsoft .NET Framework 4.5 or later.

<u>**How to download JRE suite**</u> (The instructions below is only for reference, the real situation might be different.)

Please open the URL (http://www.oracle.com/technetwork/java/javase/downloads/ index.html), fund [Java SE 8u161/ 8u162] item, anf click on [JRE] doenload button.



Find the Java SE Runtime Environment 8u162 version, select [Accept License Agreement] option, and choose [Windows x64 Offline] JRE item to download.

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Solaris SPARC 64-bit	52.24 MB	Fire-8u162-solaris-sparcv9.tar.gz					
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Windows x86 Online	1.78 MB	jre-8u162-windows-i586-iftw.exe					
Windows x86 Offline	61.36 MB	jre-8u162-windows-i586.exe					
Windows x86	64.58 MB	jre-8u162-windows-i586.tar.gz					
Windows x64 Offline	68.27 MB	jre-8u162-windows-x64.exe					
Windows x64	68.58 MB	ire-8u162-windows-x64.tar.gz					

Chapter 2 Install Essential Environment Kits

 After installing the operating system and database software (In this manual, we take Microsoft Windows Server 2012 R2, 64bit, Microsoft SQL Server 2012 (64bit), and PostgreSQL v10 as example), please continue to complete the installations of Microsoft .NET Framework 4.5 or later version, and Java SE Runtime Environment 8 or later version.

Reminder: When installing Microsoft SQL Server, be sure you select to install the [SQL Server Management Studio] suite for creating a new database account for WorldCard Team.

 After compeleting the previous installations, please naviagete to C:\Program Files\ Java\jre1.8.xxxxx\lib\security\policy\unlimited, and copy the [local_policy.jar] and [US_export_policy.jar] files to the C:\Program Files\Java\jre1.8.xxxxx\lib\security directory.

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	Cacerts	12/21/2017 5:26 PM	File
🛤 This PC	java.policy	12/21/2017 5:26 PM	POLICY File
	java.security	12/21/2017 5:26 PM	SECURITY File
年 Network	javaws.policy	12/21/2017 5:26 PM	POLICY File
	local_policy	12/7/2017 7:07 PM	Executable Jar F
	trusted.libraries	12/21/2017 5:26 PM	LIBRARIES File
	US_export_policy	12/7/2017 7:07 PM	Executable Jar F

- 3. Next, please open the web browser, enter the URL (http://download.worldcardteam. com/) to open the download page, select the [Windows Server Edition Download] page, and download [WorldCard Team (Server)] software, and Double-click the file to install after downloading.
- 4. After the installation, please do not tick to run [WorldCard Team Server Control Tools], directly click [Finish] to complete the installation.

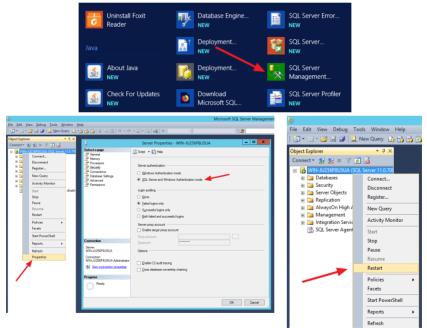


Chapter 3 Database Settings (MSSQL or PostgreSQL)

3.1 Microsoft SQL Server Related Settings

3.1.1 Add Microsoft SQL Server Database Account for WorldCard Team

If you are using Microsoft SQL Server, please open [SQL Server Management Studio] first and log in to access the database with Administrator or sa with the highest permissions. Then right click on the database server and select [Properties]. On the left side of the [Security] page, make sure you have set the server authentication as [SQL Server and Windows authentication mode]; if not, please make changes and right click on the database server and choose [Restart] to restart the database server.



Next, we need to add a Microsoft SQL Server account for WorldCard Team to use, please expand the server folder, and right click on [Security] folder, then click [New \ Login]. Select [SQL Server authentication] in the [General] page, and enter the account / password you want to use (here we take "pptest" as example); Please note that the [Enforce

Б	U	Login - New			
File Edit View Debug Tools Window Help	Select a page	📓 Script 🝷 🚺 Help			
🗄 🔽 🕶 🗃 🚰 💭 🔔 New Query 📭 📸 📸 🐇 🛝 🖏 🔊	Server Roles User Mapping Securables	Login name:	pptest	Sgarch	
Object Explorer 🔹 म 🗙	🚰 Status	SQL Server authentication			
Connect - 🛃 🛃 🔳 🍸 👩 🏹		Password:	•••••	-	
🗉 🔀 WIN-JU256P8U5UA (SQL Server 11.0.70)		Confirm password:	•••••		
I Databases		Specify old password		_	
🗉 🥅 Security		Qld password:		_	
🗉 🗀 New 🕨 Login		Enforce password policy			
Loginin		User must change passy			
Reports Server Role		 Mapped to ceptilicate 		v .	
Tredential		 Mapped to asymmetric key 		v .	
Integration Services C Audit	Connection	Map to Credential		⊻ <u>A</u> dd	
SQL Server Agent (Ag Server Audit Specification	Server: WINJU256P8U5UA	Mapped Credentials	Credential Provider		
	Connection: WIN-JU256P8U5UA\Administrator				
	Wew connection properties				
	Progress			Remove	
	O Ready	Default database:	master	~	
	107	Default language:	<pre>cdefault></pre>	v	
			ОК	Cancel	

password policy] option below must be checked out.

Then click on the [Server Roles] on the left, and check [dbcreator] for this account, the others is not recommended to check to avoid security problems, and then click [OK] to complete.

8	Login - New	_ 🗆 X
Select a page	Script - 🖸 Help	
General Server Roles Server Roles Securables Status Status	Server roles:	
-	Adadana A	
Connection		
Server: WINJU256P8U5UA Connection: WINJU256P8U5UA\Administrator		
1 View connection properties		
Progress		
O Ready		
	ОК	Cancel

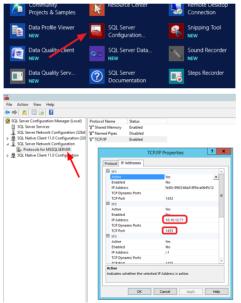
After creating the new account, it is recommended to close the SQL Server Management Studio and re-open it again, and select [SQL Server Authentication] in the [Authentication] field of login windows, then use the account / password you just created to log in to make sure the new account can be logged in correctly.

s ^j	Connect to Server	x
N SQL Sei	rver 2012	
Server type:	Database Engine	~
Server name:	WIN-JU256P8U5UA	~
Authentication:	SQL Server Authentication	~
Login:	pptest	~
Password:		
	Remember password	
Connec	t Cancel Help Option	8 >>

3.1.2 Confirm Microsoft SQL Server Database connection Parameters

To connect the WorldCard Team Services to the database program, you need to create a dedicated database, and also obtain the necessary connection parameters: [SQL Server host], [SQL Server port] and [SQL Server instance name].

To confirm [SQL Server host] and [SQL Server port] information, please go to [Applications] and open [SQL Server Configuration Administrator]. Under [Server Network Configuration], select the protocol that your database uses, and then look at the [IP Addresses] page of [TCP/IP] item on the right to see the IP address and port information of the database server.



Reminder: The default setting of TCP/IP Network Protocol is enabled, if you found it is disable, please right click on it to enable, and then restart the SQL Server.

To confirm [Instance Name] information, open [SQL Server Management Studio], select [Browse] in the [Server name] field, and then expand the [Database Engine] folder, you can see the [Instance Name] right after the computer name and "/". Please note that if you install Microsoft SQL Server without setting the Instance Name, there will be no name information here.

PenPower V 聚恬科技	VorldCard Tea	m-Win	dows Serve	er Edition	
	Java About Java New Check For Updates New		loyment	SQL Server Error NEW SQL Server NEW SQL Server Management SQL Server Profiler NEW	
SQL Serv	Connect to Server		Local Sen	Browse for Servers vers Network Servers ne server to connect to: Network Servers	×
Server type: Server name: Authentication: Login: Password: Connect	Database Engine WINJU25678U5UA WINJU25678U5UA WINJU25678U5UA	Qptions >>		Detabase Engine WINN-U256P8USUA/WCTServe Analysis Services Reporting Services Integration Services	r
				OK Cance	al Help Af

3.2 PostgreSQL Distributed Architecture Service Settings

If you are using PostgreSQL and PostgreSQL is not installed on the same server with WorldCard Team service, be aware that PostgreSQL needs to be set for WorldCard Team server to connect:

- 1. Go to C:\Program Files\PostgreSQL\10\data\ directory and find the [pg_hba.conf] file, and edit it by using Notepad or other software.
- As shown below, please choose one connection parameter to add in the [IPv4 local connections] item: [host all all 10.10.12.0/24 password] or [host all all 0.0.0/0 trust], to enable the computers to connect to this PostgreSQL server.

The first kind of connection parameters:

- Type: host, provide connection.
- Database: all, all databases on PostgreSQL.
- User: all, all accounts on PostgreSQL.
- Address: 10.10.12.0/24, assuming WorldCard Team Server's IP section is

10.10.12.0~10.10.2.255 (the subnet mask is 255.255.255.0), 24 means the server only accept the computer in same network section to connect, which is the computer with IP 10.10.12.xx. Generally speaking, IP address split into 4 sections, the second section is 8bit, the third section is 16bit, the fourth section is 24bit, if you want to allow a computer in other network section to connect, for example, to enable a computer with IP 10.10.xx.xx to connect, you have to change 24 to 16, and also change the third IP section from 12 to 0 to make it become 10.xx.0.0.

Method: password, use password verification.

# TYPE	DATABASE	USER	ADDRESS	METHOD
∉ IPv4 :	local connect	ions:		
host	all	all	127.0.0.1/32	ad5
host	all	all	10.10.12.0/24	password
# IPv6	local connect	ions:		
host	all	all	::1/128	nd5
# Allow	replication	connections f	rom localhost, by a user w	ith the
# replic	cation privil	ege.		
host	replication	all	127.0.0.1/32	nd5
host	replication	all	::1/128	nd5

The second kind of connection parameters:

If you think you setting IP network section is troublesome for you, you can use the second parameter.

• Type: host, provide connection.

.

- Database: all, all databases on PostgreSQL.
- User: all, all accounts on PostgreSQL.
- Address: 0.0.0.0/0, no IP limitation.
- Method: trust, no password verification needed.



Chapter 4 Connect Database via WorldCard Team Control Tool

Next, we need to connect the WorldCard Team program with database software. In [Applications] of Windows, click [WorldCard Team Control Tool] to open.



4.1 JRE Settings

In the [JRE Settings] page, select the path of [JRE HOME], which is the JRE installation directory, for example: C: $\$ Program Files $\$ Java $\$ jre1.8.xxxxx $\$, then click [Set] button below, there will be a check procedure, if all set, the check procedure will close up itself.

WorldCard Team Server Contr			Update config
JRE setting Server Settings Source setting	Server State	-	opulie comig
- JRE path settings JRE HOME: CUProgram Files/Java/jre1.8.0,152 Open	Stop Start Stop	~	Initialize and start updating
- Memory configuration		\checkmark	Experiment set parameter
Memory size 255 Max size: 4095M8		\checkmark	Update config file
		\checkmark	complete
	WorldCard Team web interface		
Set .	Go to the web interface 1. The first time you use this product go to the web interface and follow the support on complete the product registration process. 2. Follow this button to enter the WorldCard Team's web interface.		

4.2 Server Settings

In the [Server Settings] page, the default http and https ports of WorldCard Team services are 9080 and 9443, and you can change to other ports. If your company has its own SSL certificate, please assign the path to the certificate, otherwise, please use [Default

Certificate]. After setting, click [Set] button below, there will be a check procedure, if all set, the check procedure will close up itself.

		WorldCard Tea	am Server Contro			>
.RE setting	Server Settings	Source setting		Server State		
Port Settings				Stop	Start	Stop
http Port:	9060					
https Porti	9443					
https credentials set	ings					
Orfault :	sertificate					
Set up til						
certificate path	C//ProgramData\WorldC	ardTeamServer\keys Open				
password	******					
				WorldCard Team web inte	rface	
					to the web interface	
				 The first time you use t follow the steps to comp Follow this button to e 	lete the product registra	tion process.
			Set			

4.3 Database Settings

The settings of this page is a little mor complicated, and different types of database have different settings.

4.3.1 Microsoft SQL Server

		WorldCard Team Server	Control Tool	
.IRE setting	Server Settings	Source setting	Server State	
SQL Settings			Stop Start	Stop
- Ubrary type set			-	
	(MSSQL	O PostgreSQL		
Server URL: 1	0.10.12.71			
	Default			
	Port 1433			
	Instance Name			
Database name	worldcardteam			
Usemame:	pptest			
Password	•••••			
Note: Please co	nfirm login account has d	bcreator identity		
Business card file str	orage location settings		- World Card Team web interface	
File storage path	C/Wsers/Administr	tor/Pictures Open		
	note:	ss card image storage location, it is	Go to the web interfac	
	recommended that space.	is carb image storage location, it is there is more than 500GB of hard disk	 The first time you use this product, go to the follow the steps to complete the product reg 2. Follow this button to enter the WorldCard 	istration process.
		Connection Test Set		

- 1. Database Type: Please select the database you use, for example, MSSQL.
- 2. Server URL: Please fill in the [SQL Server host] information described in the previous Chapter, it is recommended that you fill in the localhost IP for now to test, then refer to Chpter 5.5 for outbound network settings.
- 3. Connection Parameters: If you use the default settings to install Microsoft SQL

Server, please select [Default] here, if you have changed the port or Instance Name, please select [Port] or [Instance Name] and fill in the [SQL Server port] or [SQL Server Instance name] information described in the previous Chapter.

- 4. Database Name: Please note that it cannot be changed, always named [worldcardteam].
- 5. Database Account / Password: This is the pptest / pptest that created in the previous Chapter, for the WorlCard Team can read and write the database correctly.
- File Storage Path: Please assgin the location where you want to store all the business card images, it is recommended to assign to the location which at least has 500GB of hard disk space.

4.3.2 PostgreSQL

		WorldCard Team Server	Control Tool	
JRE setting	Server Settings	Source setting	Server State	
SQL Settings			Stop Start	Stop
- Library type sele	tico			
	MSSQL	PostgreSQL		
Server URL:	localhost	Port 5432		
Database name	worldcardteam			
Usemane	postgres			
Password:	•••••			
Business card file stor	the forstine ratio or			
	Cillisers/Administrati	of Braum	WorldCard Team web interface	
File storage path		Open Open	Go to the web interfu	
	note The selected business recommended that th space.	card image storage location, it is sere is more than 50008 of hard disk	1. The first time you use this product, go to follow the steps to complete the product m 2. Follow this bottom to enter the WorldCar	the web interface a
		Connection Test Set	11	

- 1. Database Type: Please select the database you use, for example, PostgreSQL.
- 2. If PostgreSQL is installed locally, use the default value of [localhost], otherwise enter the PostgreSQL server's IP or URL. If PostgreSQL is not installed locally, refer to Chapter 3.3 for distributed architecture configuration.
- 3. Port: Please enter PostgreSQL's port, the default will be 5432.
- 4. Database Name: Please note that it cannot be changed, always named [worldcardteam].
- 5. Database Account / Password: Please enter the default administrator account (postgres) and password when installing PostgreSQL.
- File Storage Path: Please assgin the location where you want to store all the business card images, it is recommended to assign to the location which at least has 500GB of hard disk space.

4.3.3 Run WorldCard Team Service

When all the above settings are all done, click the [Set] button below and then click the [Connection Test] button to test. After passing the connection test, start the WorldCard Team service by clicking the [Start] button at the upper right of the [WorldCard Team Control Tool] window, and access WorldCard Team service to activate it by clicking [Go to the web interface] button at the lower right after WorldCard Team serveic succesfully ran.

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wry type sele										
						_		On working	Start	Stop
۲							_			
	MSSQL		> PostgreSQL							
ver URL: 10	1.10.12.71									
۲	Default									
	Port	1433								
	Instance Name									
abase name	worldcardtean	1								
mame:	pptest									
sword:	•••••									
e: Please cor	firm login accou	nt has docre	ator identity							
card file sto	rage location set	tings				- 1				/
torage path	C/Users\Ac	iministrator\	Actures	0	pen		wonduard	ream web interna	ິ 🤺	
	note: The selected recommend space.	l business ca led that then	rd image stora is more than	ge location 500GB of h	, it is ard disk		follow the	time you use thi steps to complet	s product, go to f e the product rep	he web interface stration process.
			Connection T	est	Set					
	abase name mame: word: e: Please cor card file sto	(B) Default (C) Default (C) Default (C) Instance Name (worldcardtean worldcardtean (worldcardtean worldcardtean (worldcardtean worldcardtean (worldcardtean (worldcardtean	Default Default Default Default Port Value Port Value port port port port College College	Contract Contract	B Schult Orst 143 Orst 143	B Cafuet C Funct C Funct	Collault Contact Contact	Cofund Coffee 143 Coffee 144 Coffe	E churat Contract Contract	E Unfault Indicate III Indicate IIII Indicate IIII Indicate IIIII Indicate IIIII Indicate IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII

Chapter 5 Activate WorldCard Team Service

5.1 Register WorldCard Team

Following the previous chapter, when clicking [Go to the web interface], the World-Card Team's initial registration page will open, please follow the instructions to fill in the Activation Code, the Email Address of administrator, and your Company's Information, and **then continue to fill in the User Name and login password of Administrator**.

Step1. Activate WorldCard Team Server.		Step2. Set admin passwo	ord	
Activation code:	1 1 1 1 1 1 1 1 1 1 1	User name: Password: Confirm password:	Prease enter parsword Prease enter Parsword again	· ·
Notes : 1. If you have purchased the WorldCardTeam product, please "Software Startup" card in the loss and enter the activation related information to obtain authorization to get started. 2. If you do not have a WorldCardTeam product activation co- context us.	code and le,please			

5.2 Create User Accounts

Before you create any user, you have to decide to either let different users has their own permissions to share specific information, or just let all users reach all the shared information. When you create a user, you can set the user as General account or Read-Only account, and connect this user with his supervisor if there is any. After setting up, the different users will have different access permissions.

Please enter the first account information that is to be established, and set the level of the account, as well as the permissions and functions the cccount can be used; If you allow a user to export the contact data, or allow a user to help others to scan business cards (special feature on PC version), please choose the related options to enable. After finishing adding the first user, click + to add more users to complete the whole activate process.

If you want to delete the account which is created by mistake, please click 😑 on the account picture to delete.



Step3. Permission settings	Step4. Add user	
 Standard sharing Standard sharing mode: administration can access company-wide data Superior can view subcollariset² data Based sharing setting, users can view other users shared data. Company-wide sharing All contacts has been shared, each account can view the company-wide wide contacts. 		alex.cheng@perpower.com.tw Alex General General Foor Foor Foor Foor Foor Foor Foor Foo
	Amount of users: 1/10	~

Note:

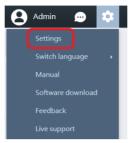
- 1. The default password for the new user is "000000". When the user first logs in, the system will ask the user to reset the password.
- 2. All user settings can be modified in the [Manage Accounts] section of WorldCard Team settings, you may refer to Chapter 6.2.
- 3. Read-only users can add / edit their own contact data, but for [Shared Contacts] data, they can only view it, they cannot be download and edit it.

5.3 Start to Use

WorldCard Team settings can only be changed by administrator logging in on the web page. When the activation is complete, you will see the URL of the WorldCard Team server on the screen. Click [Start] button or enter the URL in the browser to launch WorldCard Team web page.



Note: The port of the WorldCard Team service is 9080 (http) and 9443 (https). If you want to access manually or provide a URL for any user, please add [: 9080 or: 9443] after the URL to connect correctly. After opening, please enter administrator account / password to log in. After that, we recommend you to watch the tutorial to quickly understand the functions; Then please click the final context of screen, and choose [Settings] to enter WorldCard Team Settings.



In the settings, you can use the user account management, or adjust the data sharing settings, or add some customized fields according to the whole company's needs, if you want WorldCard Team users to connect to your company CRM system like Salesforce, please set up here.

If you want to adjust any system-related settings for the WorldCard Team server, go to the System Settings section and click the [System Settings] tab. Click the [Go to WorldCard Team Server Management Interface] button to enter WorldCard Team server system. The login account is [admin], and the password is what you set in the initial step previously. For details, please refer to chapter 3.

If you want to expand the maximum number of user accounts. please click \searrow button in the [System Overview] section to purchase more license, and then click + button to enter the activation code to update.

Please refer to the Chapter 6 for a variety of setup instructions for WorldCard Team.

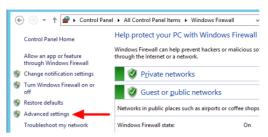
5.4 Firewall Settings

Because WorldCard Team Service uses special connection ports, you have to set up the firewall to open those ports for users to connect.

The following instruction is based on the system's firewall, please set up the system firewall, router firewall and so on accroding to your company's equipments.

1. First of all, please open [Windows Firewall], and click [Advanced settings] on the left.

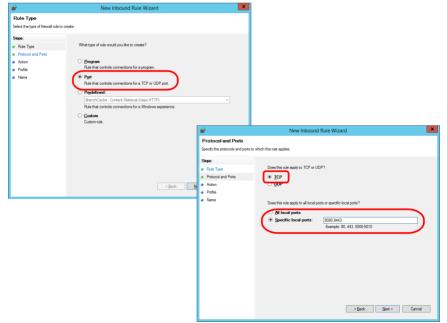
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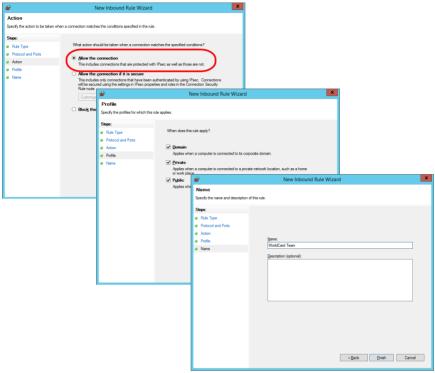
2. Click [Inbound Rules] on the left, then click [New Rules] on the right.

@	Windows	Firewall with Advanced Se	ecurity		_ 🗆 X
File Action View Help					
P Windows Firewall with Advance	Inbound Rules		i.	Actions	
Cuthourd Rules	Name Ø Firefox (C:\Program Files\Mozilla Firefox) Ø Firefox (C:\Program Files\Mozilla Firefox) BranchCache Content Retrieval (HTIP-In) BranchCache Hosted Cache Server (HTI BranchCache Peer Discovery (VSD-In) C CMN - Nework Accessi (DCOM-In) C CMN - Remote Administration (DCOM-In) Ø Core Networking - Destination Umreacha Ø Core Networking - Destination Umreacha Ø Core Networking - Destination Umreacha	BranchCache - Hosted Cach BranchCache - Peer Discove COM+ Network Access COM+ Remote Administrati Core Networking Core Networking	All	Important Rules New Rules. ✓ Fitter by Profile ✓ Fitter by State ✓ Fitter by Group View G. Refresh Boport List ✓ Labort List	• • • •

 Select [Port], and select [TCP] option in the next step, then fill in the ports at [Specific local ports] that used by WorldCard Team, such as [9080, 9443].



4. Then select [Allow the connection], and tick the types of connection that to be applied to this rule in the subsequent steps, and also the name for this rule for future identification.



5. In the last, in the [Outbound Rules] section, add the same rule to open the WorldCard Team external connections, then the whole setup is complete.

5.5 External Connection Settings

If the users need to connect back to company to use WorldCard Team Service from any external network, please refer to the following instructions to set up:

Outbound Network Uses Fixed IP

 No matter using IP address or URL to login WorldCard Team service, please pay attention on the internal IP and external IP conversion issue. Make sure you have set the corresponding IP address of the internal WorldCard Team server on the NAT- enabled device.

- For the URL login, the MIS engineer can set the DNS to assign a URL for WorldCard Team server, but if the DNS setting is difficult to you, you can just using IP address to login.
- 3. Please note the connection ports (9080 and 9443) have to be opened in all the server and internet firewalls. For the related instructions, please refer to Chapter 5.4.

External Network Uses Floating IP

- 1. If your company's external network IP is floating IP, we recommend you to apply for a fixed IP, or obtain a fixed URL by applying DDNS service.
- 2. Please note the connection ports (9080 and 9443) have to be opened in all the server and internet firewalls. For the related instructions, please refer to Chapter 5.4.

Chapter 6 WorldCard Team Settings

6.1 Basic Operations

6.1.1 Change Password / Display Name

Click On top right corner, and then click [Profile]. Click on each field to make changes. If you forgot the password, click [Forgot Password] on the main screen to reset.

6.1.2 Switch Interface Language

Click 🔯 on top right corner, and then click [Switch Language] to choose interface language.

6.1.3 Back to Homepage / Sign Out

Click the word [WorldCard Team] on top left corner to go back to Homepage; to sign out, click (on top right corner, and then click [Sign Out].

6.2 Admin Settings

WorldCard Team settings can only be changed by administrator logging in on the web page, and then click **to** on the upper-right corner of screen, and choose [Settings].

6.2.1 Manage Accounts

Here you can click the icons on the toolbar to add $\stackrel{2}{\leftarrow}$ or edit \swarrow user account, if any user forgot the password, please click to reset the password back to 000000 and inform the user to log in as soon as possible to reset the password, or you can tell the user to click [Forgot Password] button on the login page by themselves to reset password. Reminder: When creating accounts, please make sure you enter the correct Email address, to prevent users can not be logged in properly.

Account:					
Email					
Display Nar	ne:				
User nam	е				
Role:					
General					
Superior:					
None					
Account ab	ility:				
Export					
Scan bus	iness card for	colleagues			
Print					
Notes:					
		ord is "00000		unction, only	supports
	ows / Mac ed		co una princi	unction, only	Supports

If the user account is created by mistake, if this account has never logged in, you can easily click $\boxed{11}$ to delete it. But if this account has already logged in before, it cannot be deleted, you can only click 2 to set this user account as inactive user. If the owner of this user account has no longer in the company, you can also set the account as inactive.

Once the user account is set as inactive, it cannot be activated again, and the contact data belongs to this user account cannot be deleted by this user account as well; If you need to transfer those contact data to new employee, please click [Inactive User] tab, and click ice icon on the toolbar to inherit those contact data to the new user account (employee) who is going to take over this job, and the owner of those contact data will be changed immediatly to that new employee; Or you can click ice to change the data owner one by one, and the new user will be able to continue use the data.

Tips: All the shared contact data that shared by of the disabled user account can be continued use and be continuously used and updated by the users who get shared.

6.2.2 Import Account from AD Server

WorldCard Team also supports the quick import of accounts from an Active Directory Server, for you to quickly create accounts.

Click $\stackrel{2}{\sim}$ on the quick toolbar, and then enter the AD server information that to be imported (server address, server account and password, Base DN), click OK, then you

can read the account information.

If you do not know the connecting information of the AD server you want to import, please refer to the Appendix of this manual.

After ticking the accounts you want to import, press the \rightarrow button to add the accounts to the import list. To remove accounts from the import list, just click on the account and press \leftarrow to remove it.

Import the AD se	erver accoun	ot(10.10.11.2	24)	
Account:		Search		
Account		→	Account	
wct1	<u>م</u> ^	+		
wct3	6 2			
wct4	(3)			
□ wct5	63			
□ wct6	6 3			
wct7	GD			
wct8	(2)			
Wct9	(p)			
□ wct10	6			
			Import	Cancel

When the import process is complete, please edit the imported accounts to set the account's role, level and which function can be allowed, then the whole importation is done. For these imported accounts, the password to login the WorldCard Team service is the same as that settings on AD server, it will not be reset to 000000.

Reminder: The number of AD accounts that can be imported is the remaining number of accounts that you have enabled. For example, if the number of enabled accounts is 30, and 10 accounts have been manually created or imported, then the maximum number of accounts that can be imported this time is 20.

6.2.3 Sharing Rules

You already set up this during the initialization, and you can change it again here.

Standard Sharing

- Administrators can access company-wide data.
- Superior can view Subordinates' data .

Based on sharing settings, users can view the data that shared by other users.

Company-wide Sharing

• All contacts have been shared, each account can view the company-wide contacts.

6.2.4 CRM Settings

If you want WorldCard Team users to connect to your company CRM system like Salesforce, please click [Settings] to enable.

If the administrator enables the feature to connect CRM system, click CRM Settings under General Settings, and input log in information of your CRM system. You can manually export contacts to CRM systems, or have WorldCard Team synced with CRM. WorldCard Team will sync with CRM system every 10 minutes if the sync function is on.

6.2.5 Custom Field

WorldCard Team provides field customization feature, you can add up to 16 customized fields. Please click + to add new field. and then enter the field title and field property to complete.

There are 7 properties for custom fields:

- 1. Text: Can fill in texts and symnols.
- 2. Email: Can only fill in the data with Email format.
- Picklist: Customize menu content to allow users to select, the menu item limitation are 10.
- 4. Number: You can only enter integer numbers.
- 5. Floating-point Number: You can enter a value that contains a decimal point.
- 6. Date: Add date.
- 7. Date Time: Add date and time.
- Reminder: In the contact edit screen, if the input box frame is displayed in red, it means that the input data format is not accepted, please check and correct.

6.2.6 System Overview

Here you will see information about the current usage of the WorldCard Team server, including how many users and how many contacts, and more. To add more user licenses, please click \checkmark to purchase, and then click \dashv to activate.

Reminder: If your administrator account is imported from the AD server, and the AD account does not have Email information, WorldCard Team will remind you to add Email information in [Personal Information] in order to increase the authorization when adding authorization.

6.2.7 Certificate Information

This page displays the SSL certificate information of the https protocol that WorldCard Team server uses. If you need to change it, plesae open [WorldCard Team Control Tool] to change.

6.3 General Settings

6.3.1 Share Settings

Here you can choose whether you want to automatically share the new added contacts with the specific users or not. When Share Settings function is turned on, newly added contacts will be shared with the specified users. Click 🗶 to remove users from the sharing list.

For detailed information regarding Share Settings, please refer to Chapter 2.2.4 of [Web User Manual].

In addition, you can click the [Clear the contacts never being downloaded by any user] button to delete the contacts that belong to you but never downloaded by anyone, and this can let you save more useful information.

6.3.2 Display Settings

Under [Display Map of Address], you can choose an online map to display the address of contacts.

- Auto: System selects map basing on contact country information. Baidu map for China; Google map for other countries.
- Google Map: To display address on Google Map

Baidu Map: To display address on Baidu Map.

Under [Display Name Settings], you can decide the display order of first Name and last Name. Eastern names and western names can have different settings.

6.3.3 CRM Settings

WorldCard Team can work with CRM systems. If the administrator enable the feature to connect CRM system, click CRM Settings under General Settings, and input log in information of your CRM system. You can either manually export contacts to CRM systems, or have WorldCard Team synced with CRM. WorldCard Team will sync with CRM system every 10 minutes if the sync function is on.

6.4 Notification

You will receive notification when someone shares a contact with you, or WorldCard Team settings have been updated. Click ... on the top right corner of the main screen to review messages.

Messages from the system or other users can't be deleted manually. The system has a limit of 500 messages to display. Once it reaches the limit, the oldest messages will be automatically deleted by the system.

If you are notified that someone shared a contact with you, you will see the key information of the contact in the notification, including name and company. You can select the contact and click \square to download the contact to [My Contacts].

Note: You can click Date / Sharer / Description on top of the screen to sort your notification messages.

Chapter 7 WorldCard Team Applications Installation

\bigcirc Windows

To install WorldCard Team application, please open web browser and access (http:// download.worldcardteam.com/) to open download page, then click [WorldCard Team (Windows)] to download. When the dowbload is finished, please double click it to start install.

After installing and launching the WorldCard Team application, please enter the WorldCard Team server URL and key in your account / password to log in.

O Mac

To install WorldCard Team application, please open App Store 🙆 in Mac system, and enter [WorldCard Team] in the upper-right search bar to serach.

Click [Get] button, and enter your Apple account / password to start download. When the dowbload is finished, you will be able to find WorldCard Team application in [Applications].

After launching the WorldCard Team application, please enter the WorldCard Team server URL and key in your account / password to log in.

◎ iOS / Android

To install WorldCard Team app, please open App Store / Google Play in your iOS / Android device, and search [WorldCard Team] to download and install.

Or you can read the QR code below to access the download page:



After downloading and launching the WorldCard Team app, please enter the WorldCard Team server URL and your account / password to log in.

* Reminder: You are advised to log out WorldCard Team to reduce server's loading if you are not accessing it.

Chapter 8 Database Backup / Restore

8.1 Back up Microsoft SQL Server Database

To back up WorldCard Team's database of Microsoft SQL Server, please follow these steps:

- 1. Please open [WorldCard Team Server Control Tool] and stop the WorldCard Team service.
- 2. Click [SQL Server Management Studio] in [Applications] to open the console and login with Administrator or sa account.



3. Expand [Databases] in the left pane and locate WorldCard Team's database [worldcardteam]. Right-click on it and select [Tasks \ Back Up].

5		
File Edit View D	ebug Tools Window Help	,
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 □ Databases ● □ Databases ● □ System ● □ Databa ● □ Databa ● □ Report ● □ Report ● □ Report 	U5UA (SQL Server 11.0.70)	
⊕		 Detach
E integr B SQL S	Policies Facets Start PowerShell	Take Offline Bring Online Shrink
	Reports •	Back Up
	Rename Delete	Kestore Mirror
	Refresh	Launch Database Mirroring Monitor

4. After confirming the path to save the backup file, click the [OK] button to start the backup.

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Ũ	Back Up Database - w	orldcardtea	im	- 🗆 X
Select a page	Script 👻 🚺 Help			
Poptions	Source			
	Daţabase:		worldcardteam	~
	Recovery model:		FULL	
	Backup type:		Full	~
	Copy-only Backup			
	Backup component:			
	 Database 			
	O Files and filegroups:			
	Backup set			
	<u>N</u> ame:	worldcardteam	-Full Database Backup	
	Description:			
	Backup set will expire:			
Connection	After:	0	🗘 days	
Server:	0 <u>0</u> n:	12/27/2017		
WIN-JU256P8U5UA	Destination			
Connection: WIN-JU/256P8U5UA\Administrator		Disk	O Tage	
View connection properties	C:\Program Files\Microsoft SQL S	erver\MSSQL11	.MSSQLSERVER\MSSQL\E	Add
view connection properties				
Progress	< 111		>	<u>R</u> emove
Ready				Contents
			ОК	Cancel

5. After the backup is complete, you can see the file appears in the destination folder your assigned.

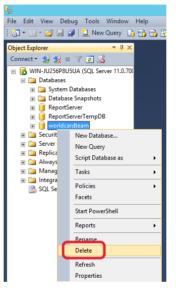
File Home Share	View		~ (
🔄 💿 🔻 🕇 📕 « MS	SQL Backup	🗸 🖒 Search Backup	Q
☆ Favorites	Name	Date modified	Туре
Desktop	worldcardteam.bak	12/27/2017 6:07 PM	BAK File

6. At last, remember to back up the business card images. The business card image's location is where you set in [WorldCard Team Control Tool] previously. Please note to back up the entire business card image folder, and do not change the folder name and structure of it, once any different from the current setting, the card images will not be loaded after restoration. For example, if the path for storing business card images at that time is set to: D:/Card Image, and the whole [Card Image] folder needs to be backed up with the database intact.

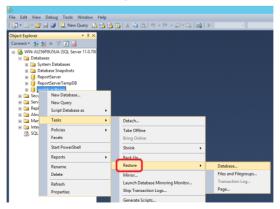
8.2 Restore Microsoft SQL Server Database

To restore WorldCard Team's database of Microsoft SQL Server, please follow these steps:

- 1. Click [SQL Server Management Studio] in [Applications] to open the console and login with Administrator or sa account.
- 2. Expand [Databases] in the left pane and locate WorldCard Team's database [worldcardteam]. Right-click on it and select [Delete] to delete the current database that you don't want to use anymore; If you are willing to retore on the new server, please skip this step.



3. Right-click on [Database] in the left pane and select [Tasks \ Restore \ Database].



4. Select [Device] in [Source] section, and browse the database backup file in thiscomputer, and click [OK] to restore.

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		Restore Database - worl					1
A tail-log backup of the source of			page.				
Select a page General	📓 Script 🔹 🚺 Help	p.					
Piles Options	Source	worldcardteam		II Sana	r/MSSQL11.MSSQLSEF		
				ie serve	101100020111110002000		
	Databa	se: wondcardteam					
	Destination						
	Databases	worldcardteam					,
	Bestore to:	The last backup	taken (Wedne	sday, D	ecember 27, 2017 6:0	Iimelin	ie
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	vorldc	ardteam-Full Database Backup	Database	Full	WIN-JU256P8U5UA	worldcardteam	1
Connection WIN-JU256P8U5UA [V/IN-JU256P8U5UA\Administr ator]							
WN-JU256P8U5UA (WIN-JU256P8U5UA\Administr ator)							
WIN-JU256P8U5UA [WIN-JU256P8U5UA\Administr	5						

- 5. After the restore is complete, please copy the business card image folder which was backed up with the database, and paste to the new location on this server. Please note do not change the folder name and structure of the business card image folder, once any different from the original setting, the card images will not be loaded after restoration. For example, if the entire folder name you backed up is [Card Image], you have to move the entire [Card Image] folder to the new loaction.
- 6. Last step, please open the [WorldCard Team Control Tool], and select [File Path] under the [Source Setting] page, then assign the path to the business card image folder you just placed, and then run the WorldCard Team service to confirm that the business card information and user information are correctly loaded.

		wondcard rea	im Server Contro		
JRE setting	Server Settings	Source setting		Server State	
SQL Settings				On working	Start Stop
Library type set	lection				
	MSSQL	 PostgreSQL 			
server URL: 1	0.10.12.71				
	Default				
	Port 1433				
) Instance Name				
Database name	worldcardteam				
Username:	pptest				
Passwordt	•••••				
Note: Please co	onfirm login account has dbi	creator identity			
Business card file st	orage leveling while ge				
File storage path	C\Users\Administrate	or\Pictures Op	m)	WorldCard Team web interface	
	The selected business recommended that the space.	card image storage location, ere is more than 500G8 of har	t is d disk	1. The first time you use this p follow the steps to complete	he web interface irroduct, go to the web interface ar the product registration process, the WorldCard Team's web interfa
		Connection Test	Set		

8.3 Back up PostgreSQL Database

To back up WorldCard Team's database of PostgreSQL, please follow these steps:

- 1. Please open [WorldCard Team Control Tool] and stop the WorldCard Team service.
- 2. Go to the PostgreSQL console by clicking [pgAdmin4] from [Applications].



3. Expand [Server \ PostgreSQL 10 \ Datebases] in the left pane and locate WorldCard Team's database [worldcardteam]. Right-click and it select [Backup].

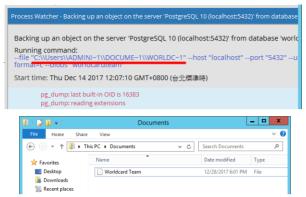
eds.		pgAd	lmin 4		_ 🗆 🗙
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() pgAdmin 4 Flower ■ Brower ● ■ Sever(1) ● PosgreSQL 10 ■ PosgreSQL 10 ● PosgreSQL 10 ■ ■ PosgreSQL 10 ● ■ ■ Occuse ● © ■ ● © Costa ● © ■ ● © Event reg ● © Language ● © Language ● Schemasa ● Event reg ● ● Schemasa ● ● Event reg ● ● Event reg ● ● ● Event reg ●	Create Refresh Delete/Drop CREATE Script Disconnect Dat Maintenance	B Dashboard Type		Z Statistics	Depende Depende De De
대 쇼 Login/Group Roles 대 Tablespaces	Backup Restore Grant Wizard Query Tool Properties				

4. Enter the backup database file name for future to identify, and click the [Backup] button, it will start the backup.

eneral Dump optio	ns	
Filename	WorldCard Team Backup	
Format	Custom	×
Compression ratio		

5. After the backup is complete, the backed up database file will be stored in the [Documents], if you want to check the correct path, you can click [Click here for details] wording on the poped message.

Backing up an object on the server 'PostgreSQL 10 (localhost:5432)' from database	'worldcardteam'. 🗙
Thu Dec 14 2017 12:07:10 GMT+0800 (台北標準時)	
0.673 seconds	
Click here for details.	
Successfully completed.	

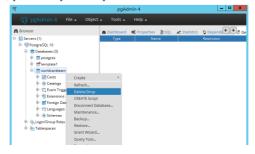


6. At last, remember to back up the business card images. The business card image's location is where you set in [WorldCard Team Control Tool] previously. Please note to back up the entire business card image folder, and do not change the folder name and structure of it, once any different from the current setting, the card images will not be loaded after restoration. For example, if the path for storing business card images at that time is set to: D:/Card Image, and the whole [Card Image] folder needs to be backed up with the database intact.

8.4 Restore PostgreSQL Database

To restore WorldCard Team's database of PostgreSQL, please follow these steps:

- 1. Go to the PostgreSQL console by clicking [pgAdmin4] from [Applications].
- Expand [Server \ PostgreSQL 10 \ Datebases] in the left pane and locate WorldCard Team's database [worldcardteam]. Right-click and it select [Delete] to delete the current database that you don't want to use anymore; If you are willing to retore on the new server, please skip this step.



3. Right-click on [Datebases] in the left pane, select [Create \ Database], and set the new database name to the same [worldcardteam].

ሞ pgAdı	nin 4 📃 🗖 🗙
🞲 pgAdmin 4 File 🗸 Object 🗸 Tools 🗸	Help 🗸
A Browser & Dashboard	📽 Properties 🖹 SQL 🕜 Statistics 🖏 Depende 🗲 🌩 De
Create Create	ependent information is available for the current object.
Create - Database	×
General Definition Security Parame	eters SQL
Database worldcardteam	
Owner 🖉 postgres	~
Comment	

4. Once created, right-click on the new worldcardteam database and select [Restore], then select the previously backed up database file to restore.

ek		pgAd	min 4		_ 0 ×
🙀 pgAdmin 4 🛛 🖡	ile 🗸 Object	🗸 Tools 🗸	Help 🗸		
Opdation 4 P Rooser Servers () Process C() Postgress () Postgress () Postgress ()	Create Create Refresh Delete//rop CREATE Script Disconnet Da Maintenance Backup Grant Wizard Grant Wizard	B Dashboard Type	Help - C Properties Nem	Z Statistics	Coppord C C C C C C C C C C C C C C C C C C C
	Properties				

- 5. After the restore is complete, please copy the business card image folder which was backed up with the database, and paste to the new location on this server. Please note do not change the folder name and structure of the business card image folder, once any different from the original setting, the card images will not be loaded after restoration. For example, if the entire folder name you backed up is [Card Image], you have to move the entire [Card Image] folder to the new location.
- 6. Last step, please open the [WorldCard Team Control Tool], and select [File Path] under the [Source Setting] page, then assign the path to the business card image folder you just placed, and then run the WorldCard Team service to confirm that the business card information and user information are correctly loaded.

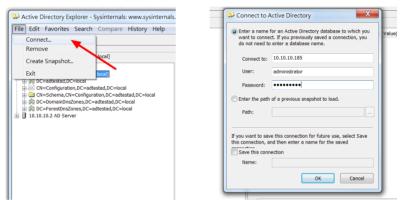


			Server State
JRE setting	Server Settings	Source setting	
- SQL Settings			On working Start Stop
-			
Library type sele			
	MSSQL	PostgreSQL	
10			
Server URL	localhost	Port 5432	
server okc:		Port	
Database name	worldcardteam		
Catabase name			
Username:	postgres		
opername.			
Password:			
Pessword.			
Business card file sto	rage ocation settings		
	C:\Users\Administrato	17.4	WorldCard Team web interface
	Cituseis Woministrato	/Pictures Open	Go to the web interface
File storage path		and income statutes beneficial in it	
File storage path	The selected business		
File storage path		re is more than 500GB of hard	
File storage path	The selected business i recommended that the space.	re is more than 500GB of hard	sk 1. The first time you use this product go to the web interface a follow the steps to complete the product registration process. 2. Follow this button to enter the WorldCard Team's web interf

Appendix: Connecting Information of AD Server

If you are not clear with the connecting information of AD server, please refer to the instructions below:

- 1. Access the URL below to download and install the free AD Exploer tool of Microsoft: https://technet.microsoft.com/en-us/sysinternals/bb963907.aspx
- 2. Execute "ADExplorer.exe", and Click [File] \ [Connect], and enter the IP address/ Account/password of your company's to connect.
- Reminder: This IP address/Account/Password are the required imformation to fill in when you import the AD accounts to WorldCard Team.



3. Then in the left pane, expand the user directory under the server. As shown in the following image, find the [DistinguishedName] item in the user directory. The value of this item is [BaseDN], which is the information to be filled in WorldCard Team software. As a result, all accounts in this user's directory will be imported.

Active Directory Explorer - Sysinternals: www.sysint	ernals	.com [10.10.10.185 [ac	[test.adtestad.local]]		_ — ×
File Edit Favorites Search Compare History He	elp				
≥ ⊄.⊛ ⊟ ≌ +++					
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Active Directory Explorer	testau.i	Attribute			
Active Directory Explorer 10.10.10.185 [adtest.adtestad.local] Active Directory Explorer			Syntax		Value(s)
		🖻 cn	DirectoryString	1	Users
I CN=Builtin		Maescription	DirectoryString	1	Deraut container für upgraueu üser accounts
CN=Computers	=	distinguishedName	DN	1	CN=Users,DC=adtestad,DC=local
CN=Deleted Objects		- an court topogenout			00:01
OU=Domain Controllers		instanceType	Integer	1	4
CN=ForeignSecurityPrincipals		isCriticalSystemObj	Boolean	1	TRUE
CN=Infrastructure		🛤 name	DirectoryString	1	Users
CN=LostAndFound		nTSecurityDescriptor	NTSecurityDescriptor	1	D:AI(A;;CCDCLCSWRPWPDTLOCRSDRCWDWO;;;SY)(A;;CCDCLCSWRPWPLOCRRC
CN=Managed Service Accounts CN=NTDS Ouotas		objectCategory	DN	1	CN=Container,CN=Schema,CN=Configuration,DC=adtestad,DC=local
CN=NTDS Quotas		objectClass	OID	2	top; container
CN=System		objectGUID	OctetString	1	{44C09DFC-1D60-4069-AD3A-143BEA8809AB}
I OU=TESTAD		showInAdvancedVie	Boolean	1	FALSE
CN=Users		systemFlags	Integer	1	-1946157056
K CN=Administrator		JuSNChanged	Integer8	1	0x1640
🗄 🐇 CN=adtest001		JuSNCreated	Integer8	1	0x1640
E & CN=adtest002		whenChanged	GeneralizedTime	1	2014/11/3 下午 12:05:20
EN=adtest003		whenCreated	GeneralizedTime	1	2014/11/3 下午 12:05:20
EN=adtest004					
E & CN=adtest005					
CN=Adtest_group					
CN=ADTESTAD1 CN=ADTESTAD1	~				
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WorldCard Team - Windows Server Edition

v1.2 Administrator Manual

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