

Penpower WorldCard Enterprise Administrator's Manual

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Penpower Technology Ltd.

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Chapter 1 Product Feature

* **Advantages of the WorldCard Enterprise**

Reduce waste of internal resources through resource sharing and improve sales staff's customer management. By using WorldCard Enterprise for customer management, sales can avoid wasting time and resources on duplicate customers. The manager can also easily manage and stay up to date on employees' sales situation, number of customers and current progress. Simple to use and maintain, even a small-and-medium enterprise with no MIS staff can operate this system.

* **Integrated Online Database**

The business card data are stored on a MS SQL 2000 or MS SQL 2005 online database. This allows it to be shared within the enterprise or within departments or by multiple users.

* **MIS Administration Tools**

A comprehensive set of MIS administration tools provided, so groups, user access and categories can all be easily managed.

* **User Access Management**

User access privileges can be set to Read Only or Full Control for ease of management.

* **Business Card Information Sharing**

Business card information can be sorted into categories and shared among multiple people.

* **Reduce Costs with Multi-User License**

Software/Hardware can be shared among multiple users to reduce costs.

* **Unicode Standard**

All new design based on the Unicode standard. Business card information in different languages can now be displayed simultaneously.

* **Multiple Language Business Card Recognition and Display**

Accurately recognize business cards in languages such as English, French, German, Italian, Spanish, Dutch, Swedish, Norwegian, Russian, Polish, Turkish, Hungarian, Traditional Chinese, Simplified Chinese, Japanese and Korean. Business cards in a different language on the opposite side can be handled as well.



* **Business Card Management**

Complete set of management functions provided for business cards such as editing of information, assigning multiple categories, setting up nested categories and also the adding of individual information and photos during editing.

* **Card Reader**

Business cards can be scanned quickly through the card reader and uploaded without going through the complications of a normal scanner.

* **Other Image Sources Supported**

Business card picture files from digital cameras or high-grade camera phones can be used as image sources for business card recognition. Multiple business cards can also be scanned and recognized simultaneously from a flatbed scanner.

* **Data Transfer**

Business card information can be imported and exported to Outlook, Outlook Express, Palm, Pocket PC, Lotus Notes and other PIMs.

* **Business Card Search**

Full text search functions help users quickly find the business card information they need.

* **Business Card Printing**

A wide variety of printing templates provided. Users can also compile their own printing templates so business card information can be easily printed into labels, envelopes, writing paper or memos.

Chapter 2 System Installation

2.1 Preparing to Install

Before installing WorldCard Enterprise, please have MS SQL Server and Query Analyser installed and ensure that the system administrator account SA can be used to log into the database.

2.2 Projected Database Size

The amount of hard disk capacity required corresponds directly to the number of business cards. A text only business card requires about 9K. A business card with a picture file will require around 90K.

Example: 100 users each with 100 business cards means 10,000 business cards in total.

If picture file is retained for all cards, required HDD capacity is: 100 User x 100 NameCards x 90K = 900MB

If picture file is not retained then the required HDD capacity: 100 Users x 100NameCards x 9K = 90MB

2.3 System Requirements for Installation of Database

- Pentium III 800 CPU or above
- 512MB of RAM or above
- 2GB of available hard disk space or above
- Windows 2000/XP/Server 2003

2.4 Installing the WorldCard MIS Tool

Before installing WorldCard client software on each personal computer, the shared database must first be set up on the network server so multiple users can share access to the card information.

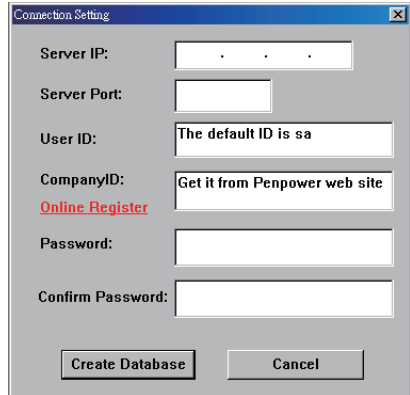
1. Insert the installation CD-ROM in the CD drive and the system will automatically launch the installation program. Please click on **Install WorldCard Enterprise MIS Tool** to Install MIS Tool. Once installation is completed the shortcut WorldCard MIS Tool will appear on the desktop.



2. Launch the WorldCard MIS Tool. You will be asked to select a language version. The available languages are English, Traditional Chinese and Simplified Chinese.



3. Enter the Information Required for Database Setup.



For the server address please enter the IP Address of the computer being used for installation. For the Server Port, please enter the port to connect with. The SQL Server default is 1433 and if no value is provided then port 1433 will be used as the default connection port. For the User ID, please enter the name of an account with administrator access to the SQL Server. The default account name is usually **SA**. For the Company ID, please enter the Company ID generated by the Penpower registration page (<http://www.penpower.net/worldcard/>). For the password, enter the login password for the SQL Server's administrator account (e.g. the password for the **SA** account). Press **Create Database** to proceed.

Setting up a database will require the database administrator **SA** account and password so there should be no security issues. Unless the user account has database administrator access, installing WorldCard MIS Tool using a normal user (client) account is not recommended.

WorldCard MIS Tool is used to maintain the WorldCard system on the server. This includes license management, database connection parameters and management of user accounts. The WorldCard MIS Tool can be installed and run from any computer as long as it can connect to the database. Due to licensing restrictions, we recommend that only the database administrator be permitted to use this administration tool.

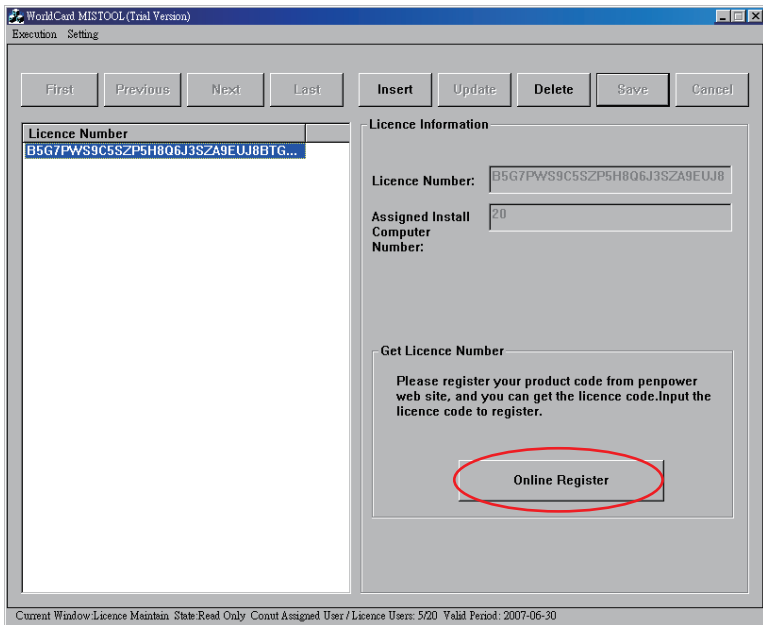
Note: If you wish to install MIS Tool in another PC, you may copy `mistool\ppdbset.pni` from the server to the `mistool` folder of the other PC.

Chapter 3 Launching WorldCard MIS Tool

3.1 Update Registration

When launching the program first time, the **Update Registration** window will be shown. Only after the user enters the License Number will they be given access to the group and user management functions. The License Number you enter will determine the number of allowed users. For the trial version there will also be an expiry date for the trial period.

If the License Number that you enter is for a full version, please connect the included KeyPro to the USB port to activate WorldCard MIS Tool.



Click the **Online Register** button to open the online registration page (shown below). Enter the product serial number, company name and contact person details to acquire the **Company ID** and **License Number**.

The **Company ID** must match the **Company ID** used in the connection parameters for the **License Number** to work.



WorldCard Enterprise Registration

We currently support v6.1,v6.2, and v6.2a for WorldCard Enterprise.

Software Version:	<input type="radio"/> 6.1/6.2 <input type="radio"/> 6.2a (Note:Upgrade licence number)
Company ID:	<input type="text"/> Required for existing users. Leave blank if new user or trial version user.
Product Serial:	<input type="text"/> Please refer Software License Agreement. Leave blank if trial version user.
Company Name:	<input type="text"/>
Contact Person:	<input type="text"/>
Telephone:	<input type="text"/>
E-Mail:	<input type="text"/>
<input type="button" value="Register"/> <input type="button" value="Trial"/>	

Note: Once you have installed WorldCard Enterprise 6.2 version and upgrade 6.2a version or later, when launching the program first time, the Upgrade Key window will be shown. Please click Obtain the new licence code and link the online registration page to get new licence code. After filling out New Licence field and submitting OK, then will renew the registration.

Upgrade Key

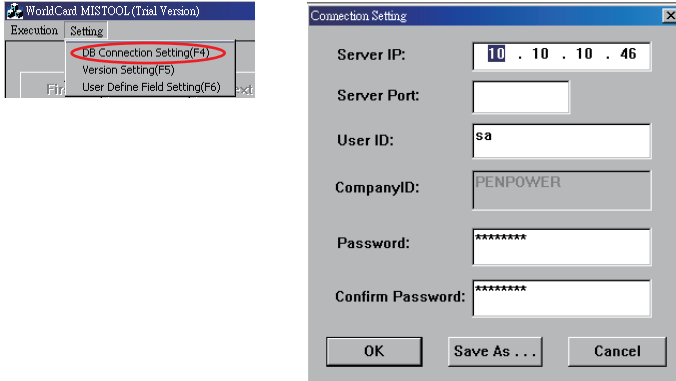
Register system upgraded. Please click the link to get new licence code.

[Obtain the new licence code](#)

New Licence

3.2 Configuring the Connection Parameters

To modify the connection parameters configuration file, by default the file is located under the WorldCard MIS Tool's installation directory at `mistool\ppdbset.pni`.

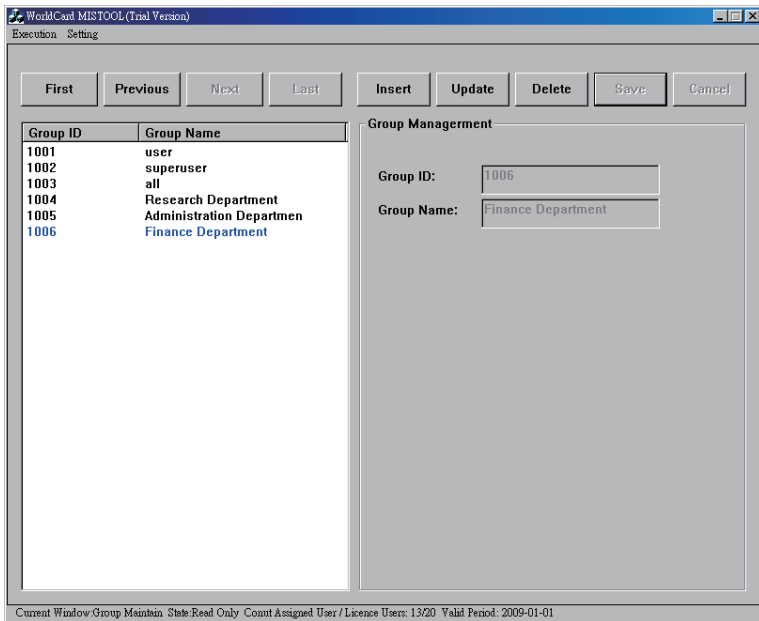


If the user needs to change the database settings after the installation process is complete, the data stored here for the WorldCard MIS Tool must be updated and saved. The `\mistool\ppdbset.pni` in the WorldCard MIS Tool's installation directory must then be copied to all WorldCard clients' installation directories under `WorldCard_Enterprise\Log\` and replace the existing `ppdbset.pni` file. Alternatively, when installing the WorldCard client, point the program to the updated `ppdbset.pni` file.

3.3 Group Management

The **Group Concept** is very important in WorldCard Enterprise. In theory, every piece of data belongs to a certain group and each user may have access to one or multiple groups. For groups to which they have **Full Control** access, users can store data into the database under that group. The database administrator can define each user's access to other groups such as read and write permissions.

From the MIS Tool toolbar, select the **RUN/Group Management** option to create, update or delete user groups. The group forms the basis of data sharing. You can set up groups based on departments or projects, with personnel belonging to the same group sharing access to the data contributed to the group.

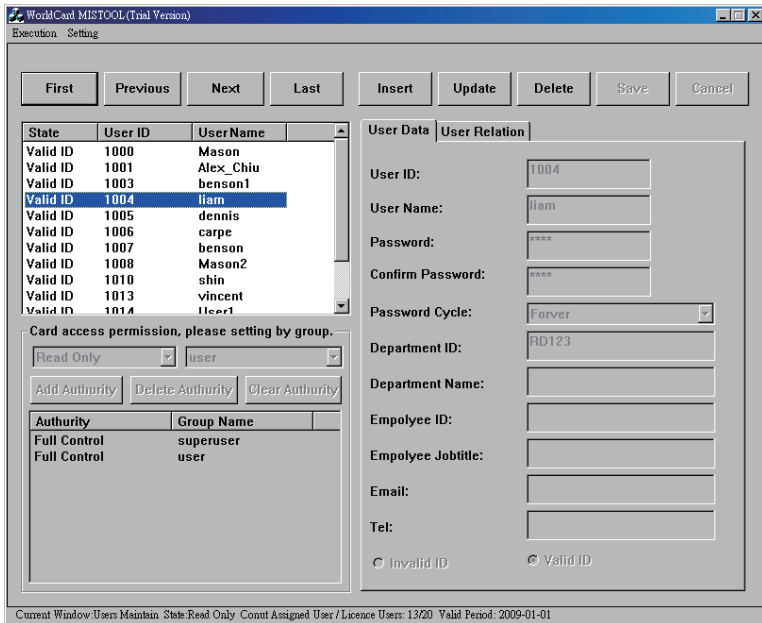


3.4 User Management

This allows the database administrator to create, update or delete user data as well as set the login password, user access and group membership. From the MIS Tool toolbar, select the **RUN/User Management** option.

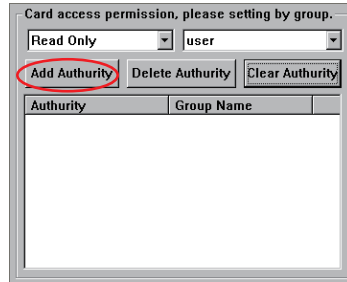
When the database administrator creates a new user it must have **Full Control** or **Read Only** access to at least one group.

For user security, the **Password Cycle** setting can be used so that the user must change to a new password whenever the current password's cycle expires. If users are not required to change their password regularly, the **Password Cycle** can also be set to **Forever**.

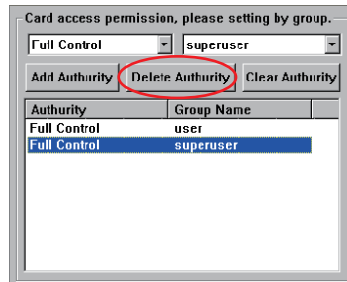




When adding an access permission, select a permission type and the group for this permission then press the **Add Authority** button to add a new group authority for this user. Repeat the steps above to add all the access permissions to give to this user.

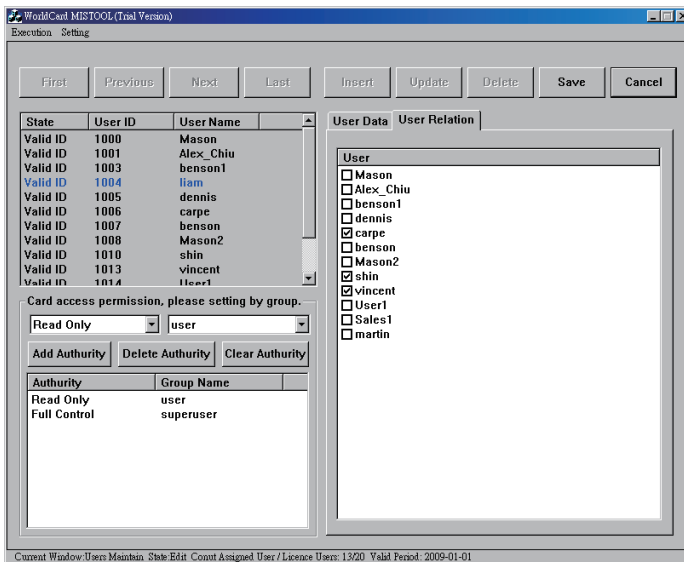


To remove access permission, please select the permission to remove then click on the **Delete Authority** button. Clicking on the **Clear Authority** will remove all access authorities.



To give users Read access, press the **Update** button then select from **User Associations** page. Select the users to give Read permission to then press the **Save** button.

Shown below: To give the user liam read access to carpe, shin and vincent's data.



3.5 Group and User Account Management Example

The example below demonstrates how to set up groups and user accounts. This will help you set up your own groups and access permissions according to your company's own situation.

Current state of the example company:

The company has two departments and one manager using the WorldCard Enterprise:

1. Sales Department: Contains two people: sales1, sales2.
2. Administration Department: Contains two people: User1, User2.
3. Manager: Manager.

Data sharing requirement:

1. Sales Department:

Can create, update, search and delete (Full Control) the Sales Department's business card data and also search (Read Only) the Administration Department's business card data.

2. Administration Department:

Can only create, update, search and delete (Full Control) the Management Department's business card data.

3. Manager:

Can create, update, search and delete (Full access) the Sales Department and Administration Department's business card data.

Online Setup:

1. Set up the appropriate groups:

First, set up a group for each department. This results in three groups: **Sales Department**, **Administration Department** and **Manager**.

Group ID	Group Name
1001	Sales Department
1002	Administrative Dep...
1003	Manager



2. Create Account for Each User and Assign Access:

- (1) Sales Department: Create two user accounts: Sales1 and Sales2. Set their group attributes to the **Sales Department** group. The settings for the Sales Department users are as shown on the right:

Set Read Only for **Administration Department** and Full Control for **Sales Department**. This means that Sales1 and Sales2 can search all business card data in the **Administration Department** and **Sales Department** groups but can only create, update and delete business card data in the **Sales Department** group.

State	User ID	User Name
Valid ID	1001	Sales1
Valid ID	1002	Sales2

Card access permission, please setting by group.

Read Only Sales Department

Add Authority Delete Authority Clear Authority

Authority	Group Name
Read Only	Administrative Dep...
Full Control	Sales Department

- (2) Administration Department: Create two user accounts: User1 and User2. Set their group attributes to the **Administration Department** group. The settings for the Administration Department users are as shown on the right:

Set Full Control for **Administration Department**. This means that User1 and User2 can search, create, update and delete business card data in the **Administration Department** group.

State	User ID	User Name
Valid ID	1001	Sales1
Valid ID	1002	Sales2
Valid ID	1003	User1
Valid ID	1004	User2

Card access permission, please setting by group.

Read Only Sales Department

Add Authority Delete Authority Clear Authority

Authority	Group Name
Full Control	Administrative Dep...

- (3) Manager: Create a user account named Manager and set its group attributes to the **Manager** group. The settings for the user Manager are as shown on the right:

Set Full Control to all business card data in the **Manager**, **Administration Department** and **Sales Department** groups. This means that the Manager can search, create, update and delete business card data in the **Manager**, **Administration Department** and **Sales Department** groups.

State	User ID	User Name
Valid ID	1001	Sales1
Valid ID	1002	Sales2
Valid ID	1003	User1
Valid ID	1004	User2
Valid ID	1005	Manager

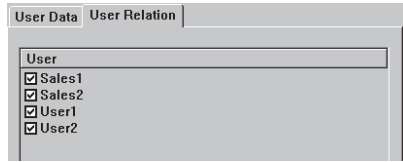
Card access permission, please setting by group.

Read Only Sales Department

Add Authority Delete Authority Clear Authority

Authority	Group Name
Full Control	Manager
Full Control	Administrative Dep...
Full Control	Sales Department

Set the user associations so that the Manager account is associated with Sales1, Sales2, User1 and User2. This setting means that when the Manager account logs into the WorldCard Enterprise Client, it will be able to create, update and delete business card data from Sales1, Sales2, User1 and User2.



The access permissions are therefore as shown below:

	Read Only	Full Control
Manager		Manager, Administration Department, Sales Department
Sales1, Sales2	Administration Department	Sales Department
User1, User2		Administration Department

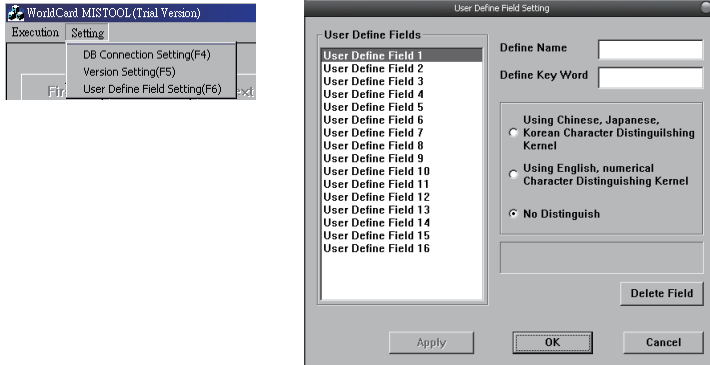
After setting up the groups and user accounts, the WorldCard Enterprise Client can now be used to input and manage business cards.

(For detailed operating instructions please refer to the User Manual)



3.6 User Define Field

Click **Setting** and select **User Defined Field Setting** to open the **User Defined Field Setting** dialog box as following:



You may define up to ten user-specified fields to be displayed in your WorldCard Enterprise screens. To define a field, select a **User Defined Field** from the available fields on the left side of the dialog box. Then, assign the **Define Name** and **Define Key Word** in the text box. Set the language recognition option and click **Apply**.

3.7 Data Backup and Restoration

The data stored by the WorldCard Enterprise contains all of a company's business card data so this must be safeguarded by a complete data backup and restoration mechanism.

This requirement was taken into account at development so all WorldCard data including user settings, users' business cards and associated settings are stored within the database itself. A complete backup of the database is therefore all that's necessary to safeguard all of the data. To restore, simply restore the database and re-install the client (if it was also damaged as well). Please run Microsoft SQL Server's Enterprise Manager and use the included backup and restore function. For detailed instructions, please refer to the Microsoft SQL Server instruction manual.

Attention: It is strongly recommended that you backup your data regularly to safeguard your corporate assets.

If you need to reinstall the WorldCard server, please back up the data first to avoid data loss from the database being recreated.

Chapter 4 Basic Troubleshooting

Q: Unable to login after launching the WorldCard Enterprise MIS Tool and the message **Unable to connect to database** appears.

A: To connect to the database you must have network access and the database must be working properly. Please check that the network is available and that the database you wish to connect to is accessible. If you are using the MIS Tool for the first time, please refer to the Preparing to install section of the Administrator's Manual.

Q: When running the WorldCard Enterprise MIS Tool, the message **The database has run out of space, please check if there is sufficient space available** appears.

A: Please check if the database has sufficient hard disk space remaining. Check if the log file generated by the MS SQL Server is set for regular clearing so that it does not increase in size indefinitely.

Q: Unable to login after launching the WorldCard Enterprise MIS Tool and the message **Incorrect registration** appears.

A: Please confirm that the **License number** and **Company ID** are correct. You may restart WorldCard Enterprise MIS Tool after correction.

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