WorldCard Team - Windows Server Edition

Administrator Manual

Version: v1.8

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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

v1.8.9

- Change the environment kit to OpenJDK. Page 1-2

v1.8.0

- Support Salesforce custom domain login.

v1.7.0

- Add AD account auto-sync function.
- Add company address book access function.

v1.6.0

- Change default password to "penpower".
- Suspending user become unable to log in and cannot be shared.
- Can set conditions to automatically suspend any user account.

v1.5.0

- Add [URL] field option of User Defined Field function.

v1.4.0

- Add user suspension mechanism.

v1.3.0

- Add WorldCard Team Startup tool.
- Add platform restrictions and device binding function.
- Add IP connection restriction.
- Add notification function after database restore.

v1.2.1

- Add JRE download instructions.
- Revise JRE set up instructions.

v1.2.0

- 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.

Reminder: It is recommended to use PostgreSQL version 9.6 and tick to install pgAdmin tool, but no need to install Stack Builder package.

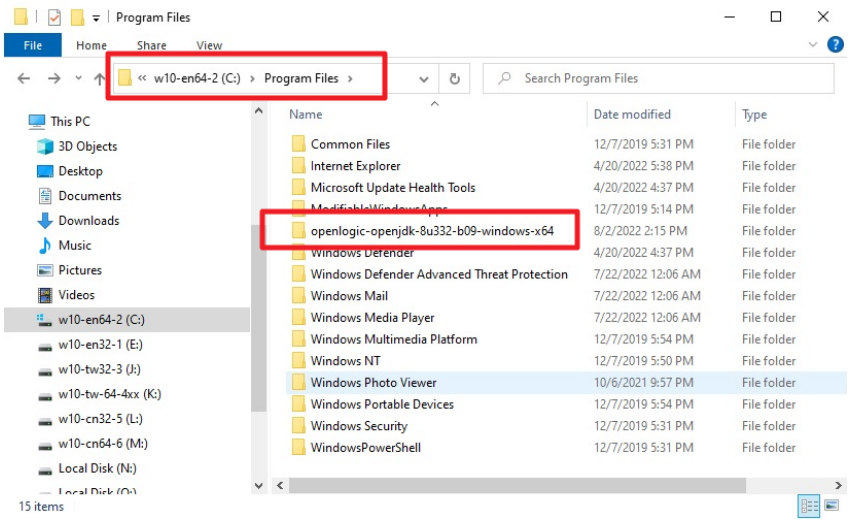
1.4 Essential Environment Kits

Please install the following essential environment kits:

- Java OpenJDK 8
- Microsoft .NET Framework 4.5 or later.

If You Use OpenJDK

Please download the ZIP archive of OpenJDK 8 for Windows platforms. After downloading, please unzip it to: <C:\Program Files\> for the WorldCard Team environment detection program can detect it correctly.

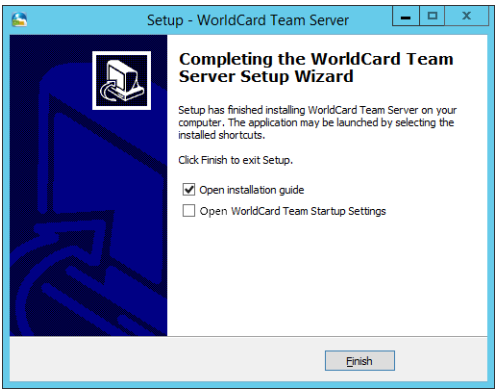


1.4.1 Install Essential Environment Kits

1. 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 v9.6 as example), please continue to complete the installations of Microsoft .NET Framework 4.5 or later version, and Java SE Runtime Environment v1.8 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.

2. 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.
3. After the installation, please do not tick to run [WorldCard Team Server Startup Settings], directly click [Finish] to complete the installation.

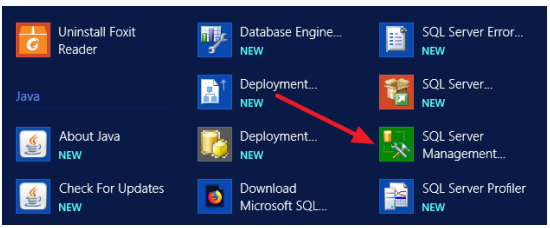


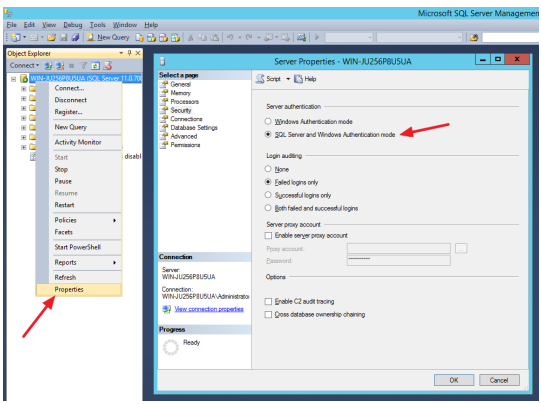
Chapter 2 Database Settings (MSSQL or Postgre)

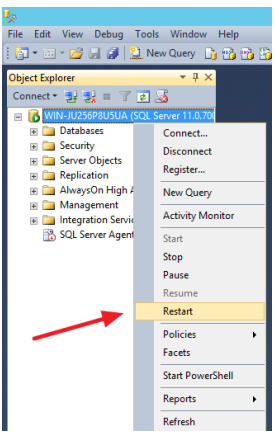
2.1 Microsoft SQL Server Related Settings

2.1.1 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.

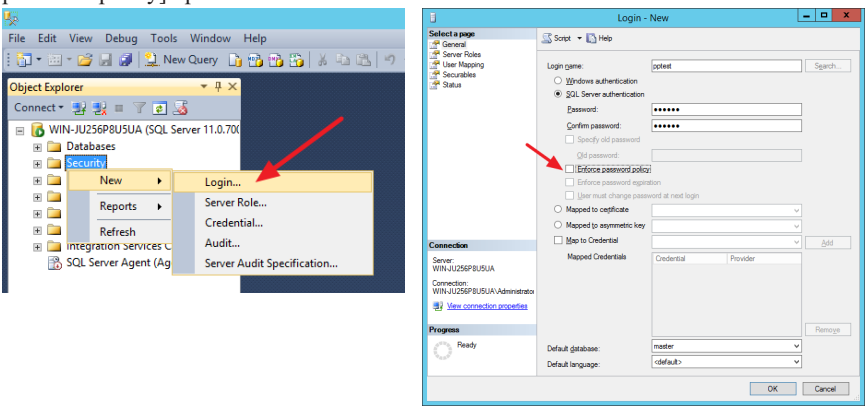




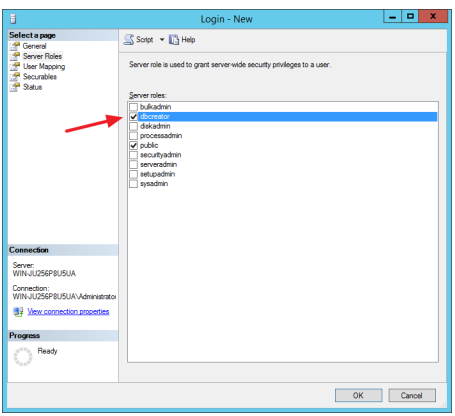


Next, we need to add a Microsoft SQL Server account for WorldCard Team to use, please expand the server folder, and right click on [Security] folder, then click [New \ Login]. Select [SQL Server authentication] in the [General] page, and enter the account / password you want to use (here we take “pptest”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

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.

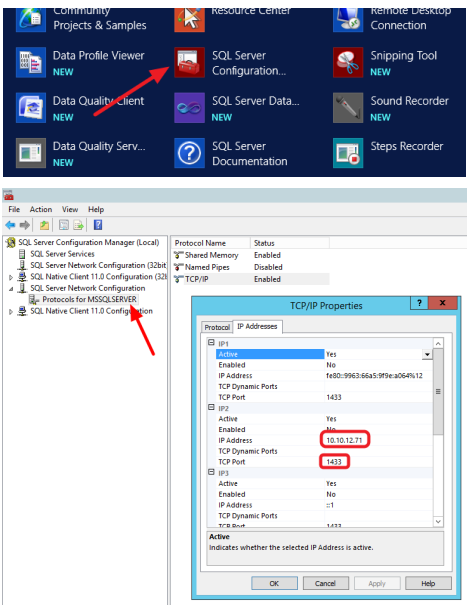


After creating the new account, it is recommended to close the SQL Server Management Studio and re-open it again, and select [SQL Server Authentication] in the [Authentication] field of login windows, then use the account / password you just created to log in to make sure the new account can be logged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

2.1.2 Confirm Microsoft SQL Server Database connection Parameters

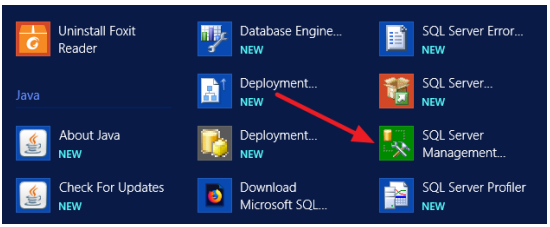
To connect the WorldCard Team Services to the database program, you need to create a dedicated database, and also obtain the necessary connection parameters: [SQL Server host], [SQL Server port] and [SQL Server instance name].

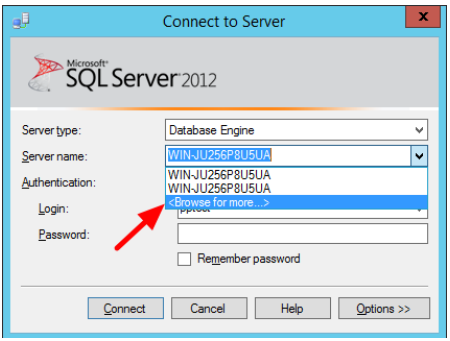
To confirm [SQL Server host] and [SQL Server port] information, please go to [Applications] and open [SQL Server Configuration Administrator]. Under [Server Network Configuration], select the protocol that your database uses, and then look at the [IP Addresses] page of [TCP/IP] item on the right to see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

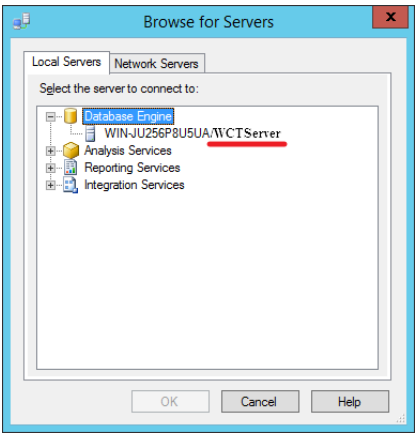


Reminder: The default setting of TCP/IP Network Protocol is enabled, if you found it is disable, please right click on it to enable, and then restart the SQL Server.

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.







2.2 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:

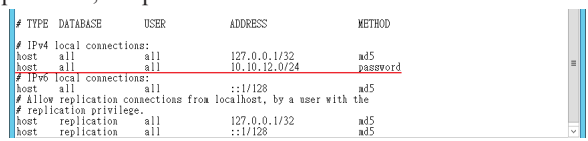
1. Go to C:\Program Files\PostgreSQL\9.6\data\ directory and find the [pg_hba.conf] file, and edit it by using Notepad or other software.
2. As shown below, please choose one connection parameter to add in the [IPv4 local connections] item: [host all all 10.10.12.0/24 password] or [host all all 0.0.0.0/0 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

10.10.12.0~10.10.12.255 (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.

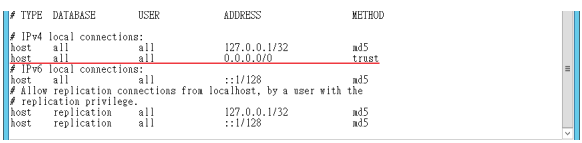
- Method: password, use password verification.



The second kind of connection parameters:

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

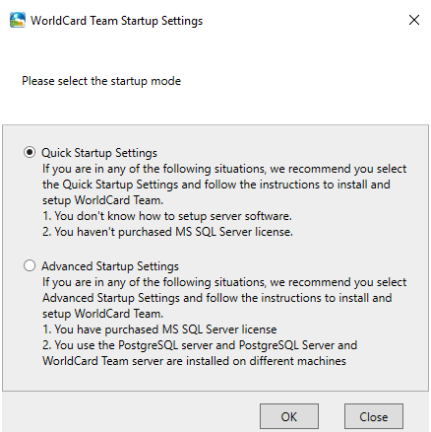
- Type: host, provide connection.
- Database: all, all databases on PostgreSQL.
- User: all, all accounts on PostgreSQL.
- Address: 0.0.0.0/0, no IP limitation.
- Method: trust, no password verification needed.



Chapter 3 Connect Database via WorldCard Team Startup Tool

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

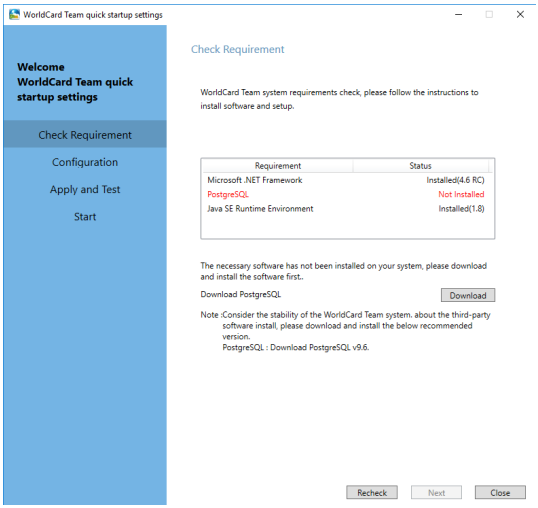
Select whether you want to use [Quick Startup Settings] or [Advanced Startup Settings]. If you are not familiar with the server setup, and install the PostgreSQL database with WorldCard Team service on the same server, we recommend you to choose [Quick Startup Settings]; if you are using the Microsoft SQL Server database, or PostgreSQL database, but not installed on the same server with WorldCard Team Service, it is recommended to use [Advanced Startup Settings].



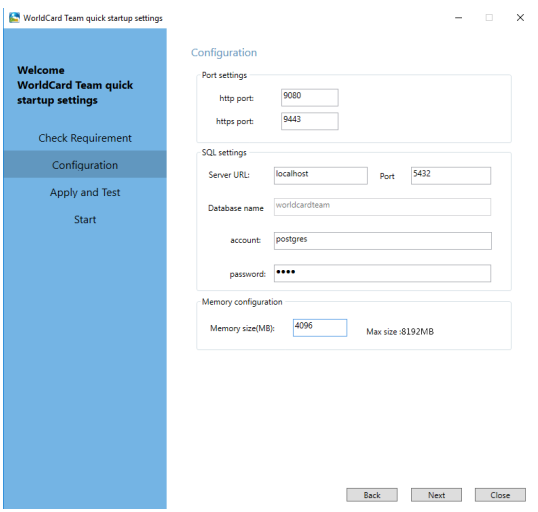
3.1 Quick Startup Settings

After choosing [Quick Startup Settings], it will check if the required environment kit and database software are installed and set. If there is any problem, it will be displayed as

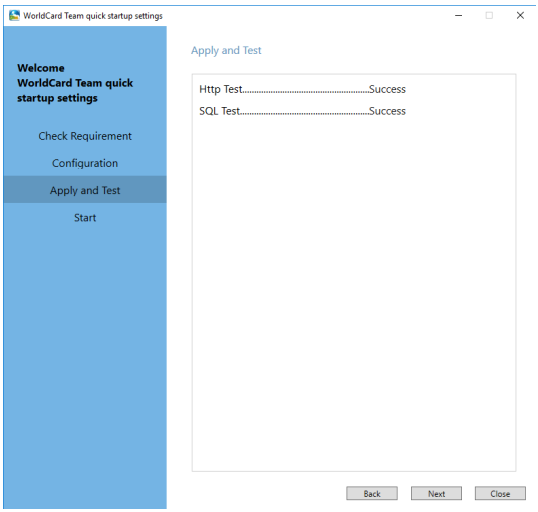
shown in the following figure and provide your corresponding suggestions.



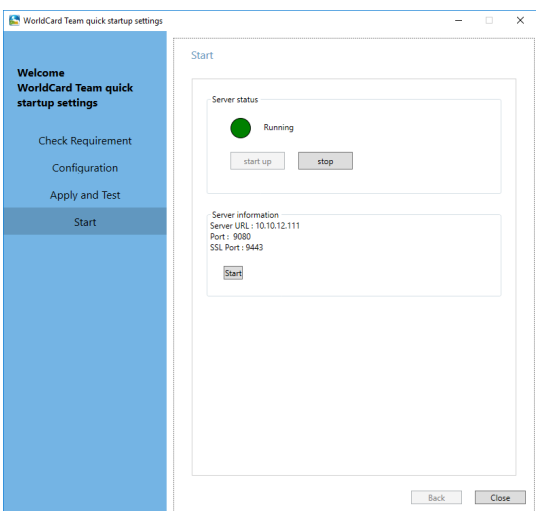
When the check is passed, click [Next] to enter the setting procedure. In the [**Port Settings**] item, the default http and https connection ports of the WorldCard Team service are 9080 and 9443, you can use other ports instead; in the [**SQL Settings**] item, you only need to fill in the administrator password in the [Password] field that set when installing PostgreSQL. If you have modified the connection port value when installing PostgreSQL, please fill in the correct value here. In the [**Memory Configuration**] item, enter at least [4096] MB to ensure that the WorldCard Team service can work properly.



After setting, please click [Next] to continue. At this time, WorldCard Team Server Startup Settings will check to confirm the input information is correct. If there is no error, please click [Next] to continue; if there is any error, please click [Next] to return to correct.

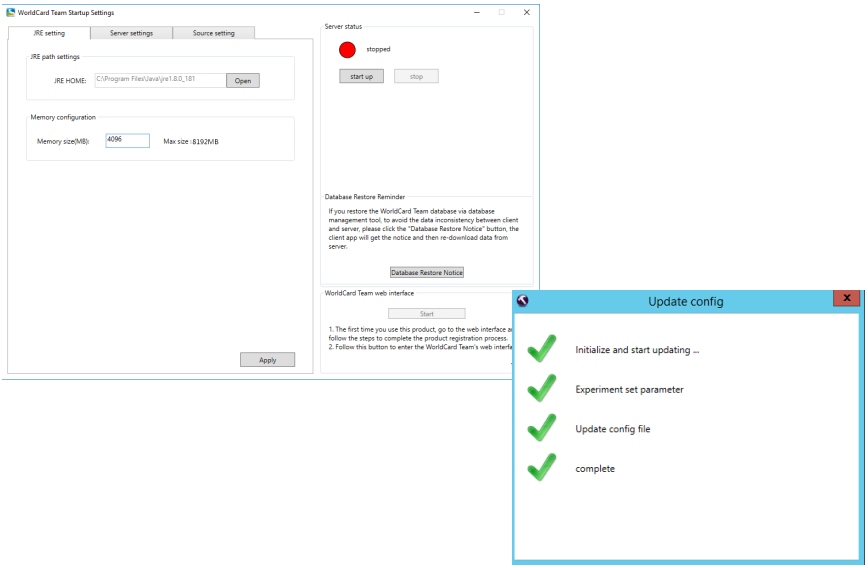


Click [Start] button in the [**Server Status**] area, then the WorldCard Team service will be initialized and run. When the status changes from red to green, you can click the [Start] button below and refer to the next chapter to register and activate your WorldCard Team server.

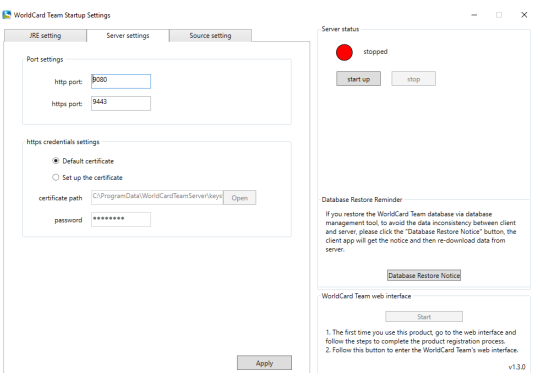


3.2 Advanced Startup Settings

If you choose [Advanced startup Settings], in the [JRE Settings] page, select the path of [JRE HOME], which is the OpenJDK installation directory, then click [Set] button below, there will be a check procedure, if all set, the check procedure will close up itself.



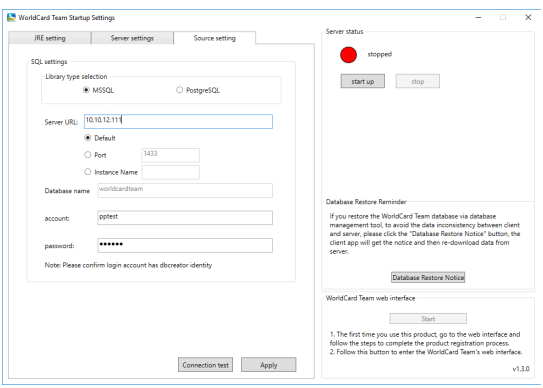
Next, in the [Server Settings] page, the default http and https ports of WorldCard Team services are 9080 and 9443, and you can change to other ports. If your company has its own SSL certificate, please assign the path to the certificate, otherwise, please use [Default Certificate]. After setting, click [Set] button below, there will be a check procedure, if all set, the check procedure will close up itself.



The last page of [Database Settings] is a little complicated, and different types of database have different settings:

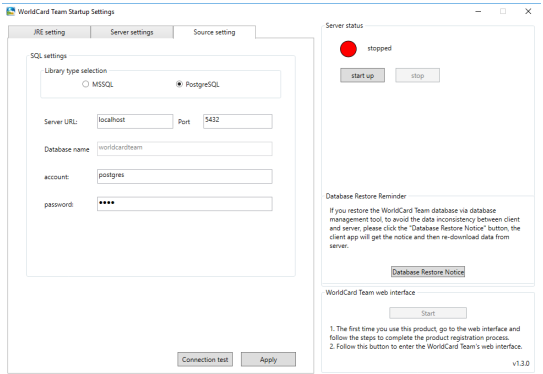
Microsoft SQL Server

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 Chapter 4.5 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 this cannot be changed, always named [worldcardteam].
5. Database Account / Password: This is the pptest / pptest that created in the previous Chapter, for the WorldCard Team can read and write the database correctly.

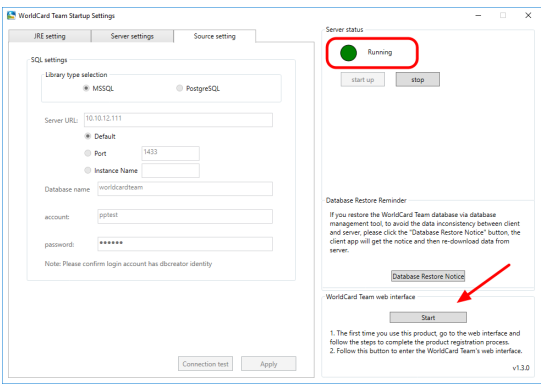


PostgreSQL

1. Database Type: Please select the database you use, for example, Postgre.
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 2.2 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.



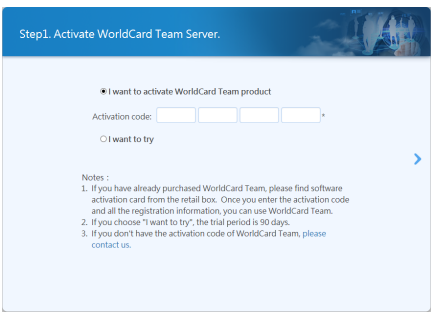
When all the above settings are done, click the [Set] button below and then click the [Connection Test] button to test. After passing the connection test, start the WorldCard Team service by clicking the [Start Up] button at the upper right of the [WorldCard Team Startup Tool] window, and access WorldCard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

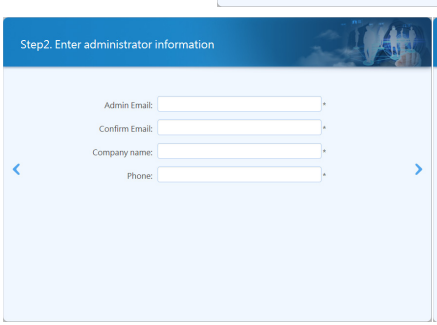


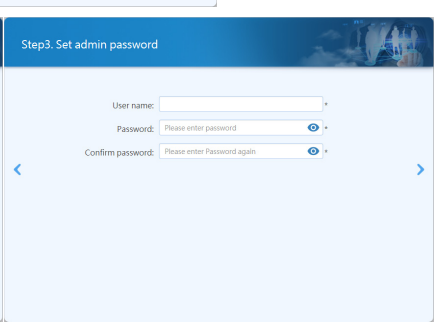
Chapter 4 Activate WorldCard Team Service

4.1 Register WorldCard Team

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



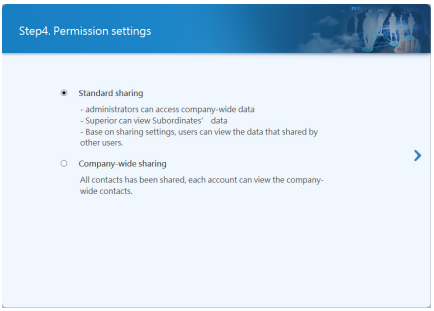




4.2 Create User Accounts

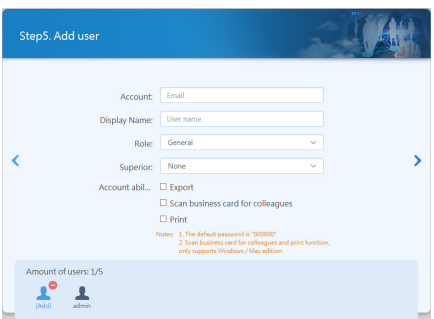
Before you create any user, you have to decide to either let different users has their own permissions to share specific information, or just let all users reach all the shared information. When you create a user, you can set the user as General account or Read-Only account, and connect this user with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

ferent 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 account 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.

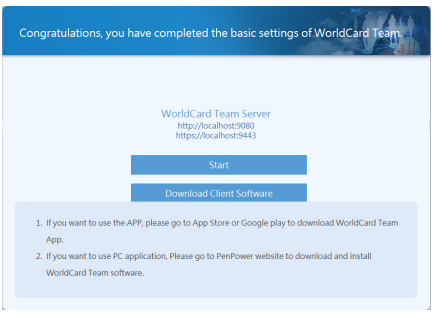


Note:

1. ***The default password for the new user is "penpower". 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 5.2.***
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.***

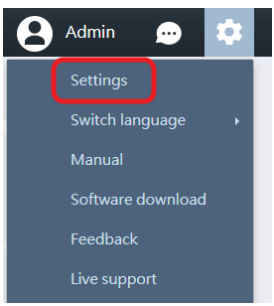
4.3 Start to Use

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 icon on the upper-right corner 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 expand the maximum number of user accounts. please click button in the [System Overview] section to purchase more license, and then click + button to enter the activation code to update.

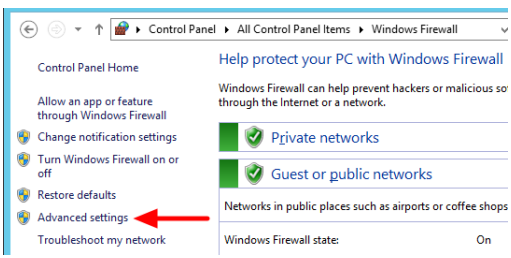
Please refer to the Chapter 5 for a variety of setup instructions for WorldCard Team.

4.4 Firewall Settings

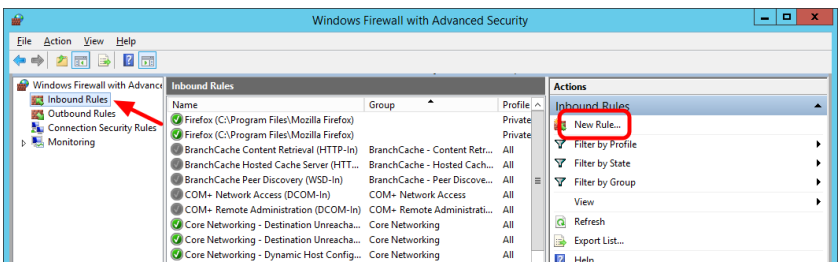
Because WorldCard Team Service uses special connection ports, you have to set up the firewall to open those ports for users to connect.

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

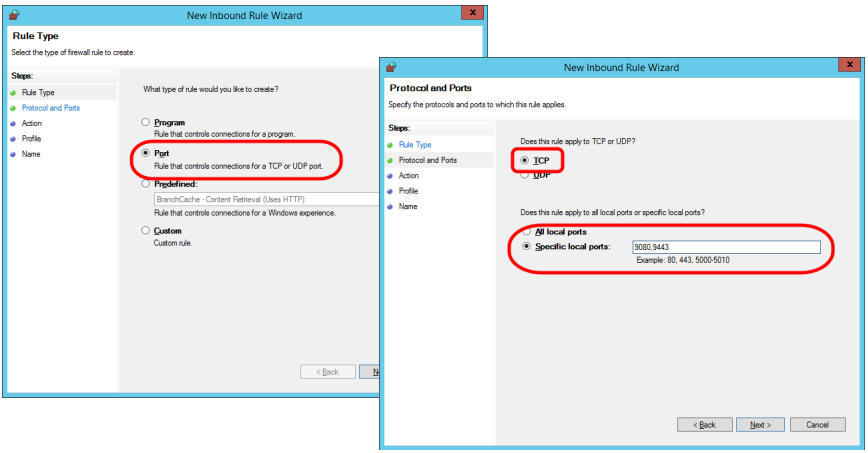
1. First of all, please open [Windows Firewall], and click [Advanced settings] on the left.



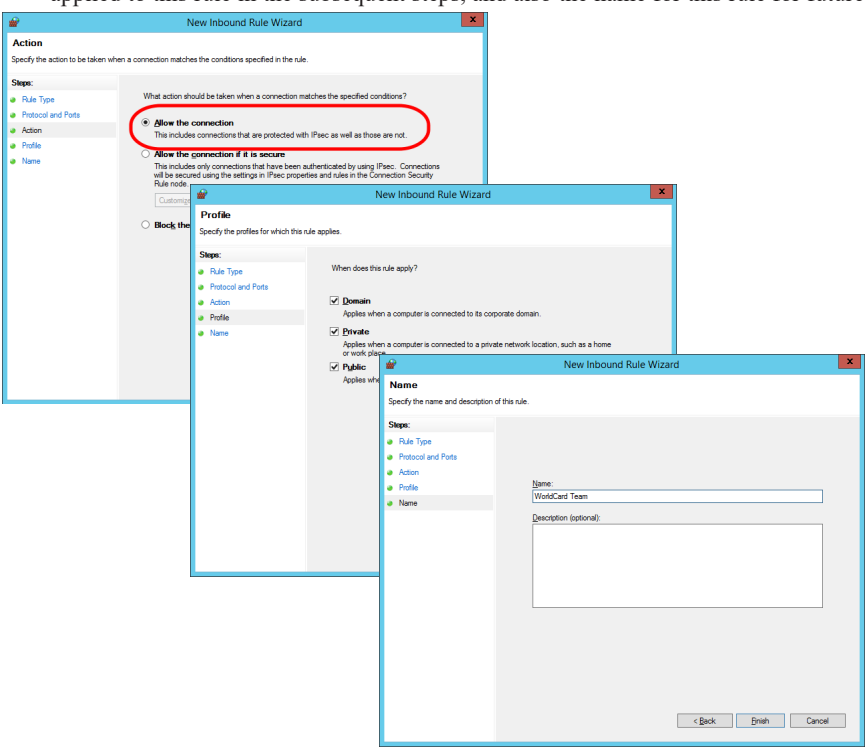
2. Click [Inbound Rules] on the left, then click [New Rules] on the right.



3. 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



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.

4.5 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

1. 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.
2. 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 4.4.

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 4.4.

Chapter 5 WorldCard Team Settings

5.1 Basic Operations

5.1.1 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.

5.1.2 Switch Interface Language

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

5.1.3 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].

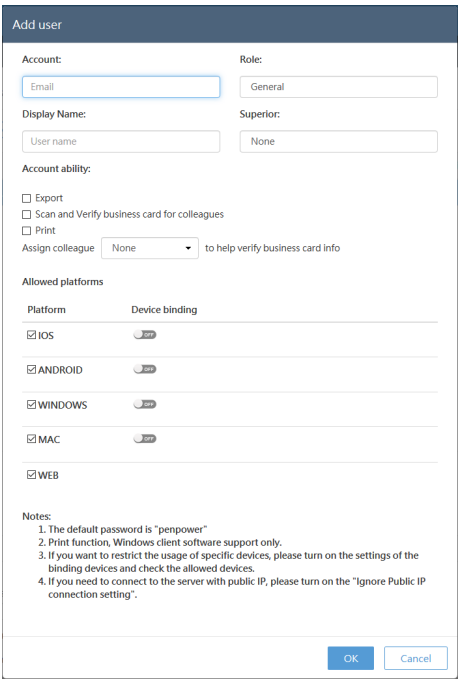
5.2 Admin Settings

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

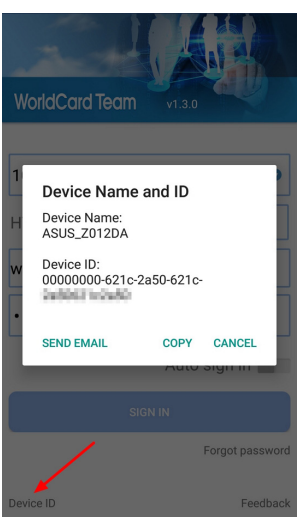
5.2.1 Manage Accounts

Here you can click the icons on the toolbar to add or edit user account, if any user forgot the password, please click to reset the password back to “penpower“ 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.



If you want to restrict a user to only use Android devices or Windows computers, or even use web pages to connect, etc., please make settings in the [Allowed Platforms] project.



Tip: Each platform can be bound to up to two devices.

If you want to bind a device in advanced, for example, if the user requests that he wants to make sure his account will not be logged in by other device, you can ask the user to use the device that to be bound to connect, then you click to edit the user's account, and then click next to the platform, then the device information will list, then you can tick to bind the device.

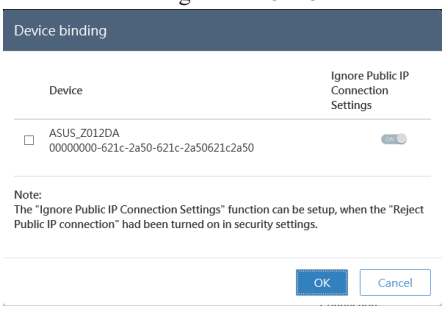
If the user has used multiple devices to connect, in

order to ensure the correct information, as shown on the right, the user can tap on the [Device ID] of the software login screen on the device that to be bound, and provide the correct device information to the administrator via email.

Reminder:

1. ***It is recommended to bind the device before going on a business trip. If the user is already outside of the company without binding, or his/her device is lost when he/she is outside, and need to use the new smart phone to connect. At this time, the user can use the new device to connect, although the connection will fail, the server will still have a connection record, at this point, the user can contact the administrator to bind the new device to log in again.***
2. ***If the user leaves the company, please remember to unbind the device that has been bound to.***

If you have [Public IP Connection Restriction] enabled, it is recommended that you open the [Ignore External IP Connection Settings] if possible, because the IP address of the mobile device is usually not internal to the company. For related external IP restriction settings, please refer to the following section 5.2.8.



5.2.2 Delete/Deactivate/Suspend User Account

If the user account is created by mistake, if this account has never logged in, you can easily click to delete it. But if this account has already logged in before, it cannot be deleted, you can only click 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 above, and click 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 immediately to that new employee; Or you can click 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.

If the user account will be temporarily not use, click to suspend the user account. After suspending, please note that user cannot log in (only administrator account can still be able to log in on webpage), and other users cannot share the contact data to the suspended user account.

To enable a suspended user account, click the [Pause] tab above, select the user account you want to enable, and click to cancel the suspension.

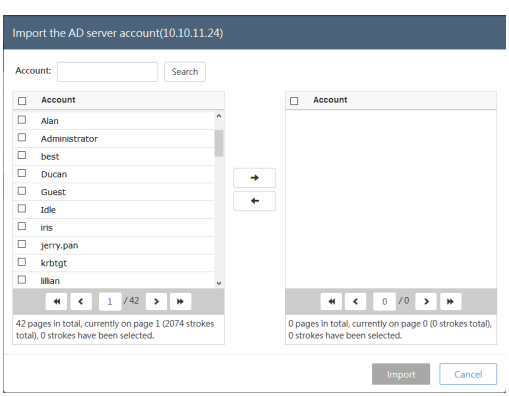
In addition, if necessary, you can enable the [Automatic Suspend Account] options at the bottom of the page. When an account meets the conditions you set (new user is not logged in within how many days, failed to log in for how many times), the account will be automatically suspended. .

5.2.3 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 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 → button to add the accounts to the import list. To remove accounts from the import list, just click on the account and press ← to remove it.

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 those settings on AD server, it will not be reset to "penpower".

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.

In addition, you can use the AD account synchronization function to automatically check account changes on the AD server. When a AD account is removed, the WorldCard Team server will suspend that account and import a new account (if there are new users on the AD server) after synchronization. If it is confirmed that the suspended user is invalid, please set it as deactivated and perform data inheritance action.

Reminder: After enabling the automatic synchronization function, the WorldCard Team Server will automatically check the AD server 3 times a day.

5.2.4 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.

5.2.5 CRM/Address Book Settings

In here, you can set whether to associate the user's contact information with the company CRM or company address book.

If you want WorldCard Team users to connect to your company CRM system or

company address book, please select it click [Settings] to enable. If your company's Salesforce URL is customized, please select [Custom Domain] when setting it, and fill in the specific domain, so that when the users need to access to Salesforce, it will automatically connect to your company's dedicated Salesforce.

To allow accessing to the company address book (currently supports Exchange and Office 365), click [Settings] after selecting the address book system (such as Exchange), enter the IP or URL of the Exchange server, and then click [Setting] to enable this feature.

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

5.2.6 Custom Field

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

There are various properties for custom fields:

1. Text: Can fill in texts and symbols.
2. URL: Can enter URL information.
3. Email: Can only fill in the data with Email format.
4. Picklist: Customize menu content to allow users to select.
5. Number: You can only enter integer numbers.
6. Floating-point Number: You can enter a value that contains a decimal point.
7. Date: Add date.
8. 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.

5.2.7 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 to purchase, and then click 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.

5.2.8 Certificate Information

This page displays the https certificate information of the https protocol that WorldCard Team server uses. If you want to use your company's own https certificate, plesae open [WorldCard Team Startup Tool] to change, you need to reboot the WorldCard Team server to take effect.

If you do not have a formal https certificate, you will see warnings about non-secure websites when you access your WorldCard Team webpage with your browser. You may choose to continue using (depending on the browser type, there will be different ways to allow continued use) or replace with your company's certification, then there will be no more warning message.

5.2.9 Security Settings

Enable this feature when you want to restrict users to access to the WorldCard Team server only from company's internal IP or a device with a specific external IP address. For example, if you only allow a Windows computer in the boss's home to connect, or only the branch office staffs can connect, you can click to fill in the range of IP addresses or an IP segment that can be allowed to connect. .

5.3 General Settings

5.3.1 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, and the user you shared to will

receive the notifications. Click ✖ to remove users from the sharing list.

For Notification information, please refer to Chapter 5.4; 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.

5.3.2 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.

5.3.3 CRM/Address Book Settings

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

5.4 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 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 6 WorldCard Team Applications Installation

◎ 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 download 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.

◎ Mac

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

Click [Get] button, and enter your Apple account / password to start download. When the download 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:

iOS

Android

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

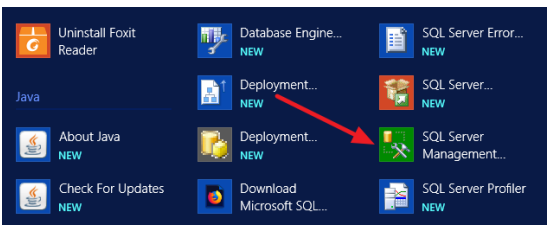
**** Reminder: You are advised to log out WorldCard Team to reduce server's loading if you are not accessing it.***

Chapter 7 Database Backup / Restore

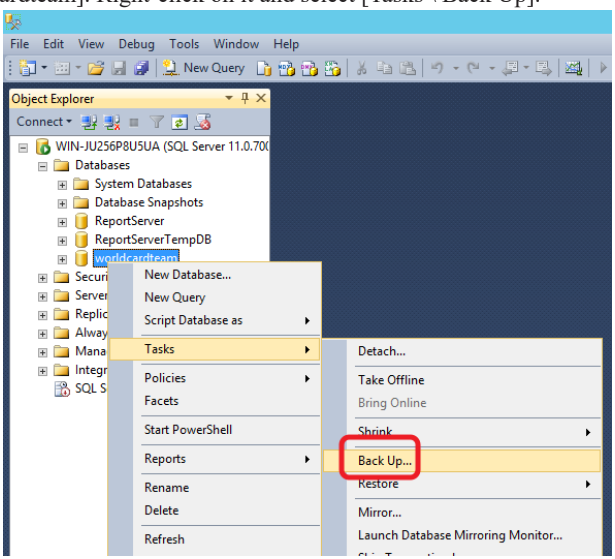
7.1 Back up Microsoft SQL Server Database

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

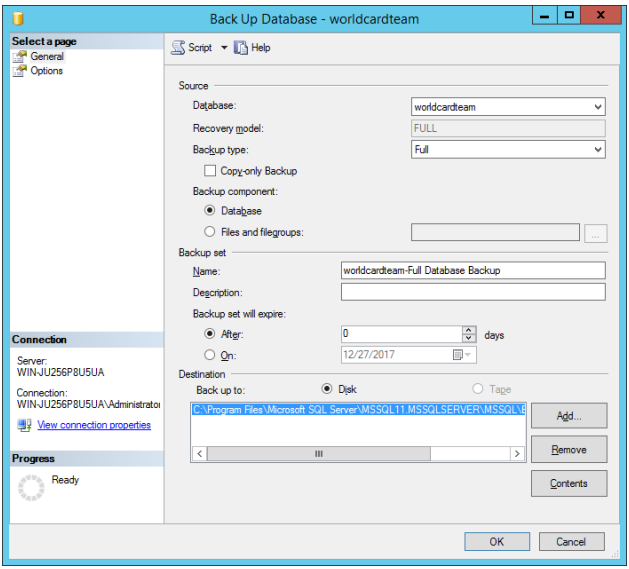
1. Please open [WorldCard Team Server Startup Settings] and stop the WorldCard Team service.
2. Click [SQL Server Management Studio] in [Applications] to open the console and login with Administrator or sa account.



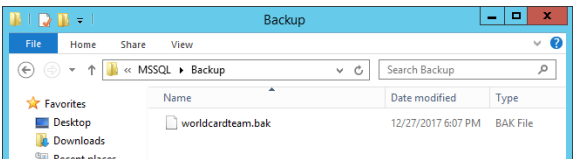
3. Expand [Databases] in the left pane and locate WorldCard Team's database [worldcardteam]. Right-click on it and select [Tasks \ Back Up].



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



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



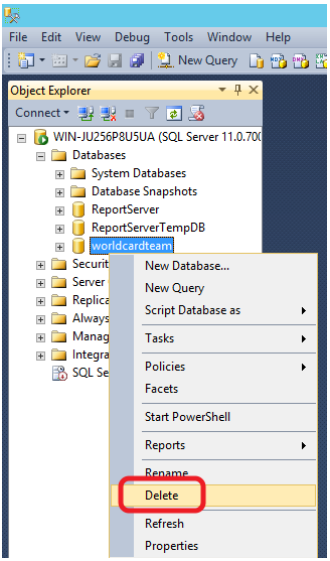
Reminder: The business card images will be backed up together with the database, and will be restored together.

7.2 Restore Microsoft SQL Server Database

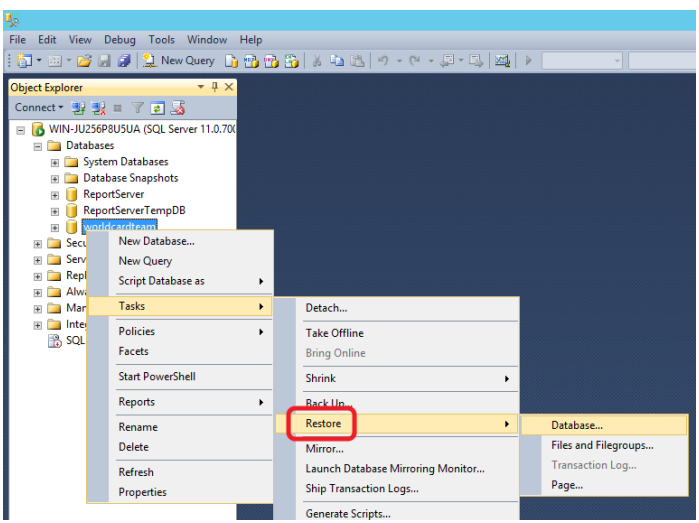
To restore WorldCard Team's database of Microsoft SQL Server, please follow these steps:

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

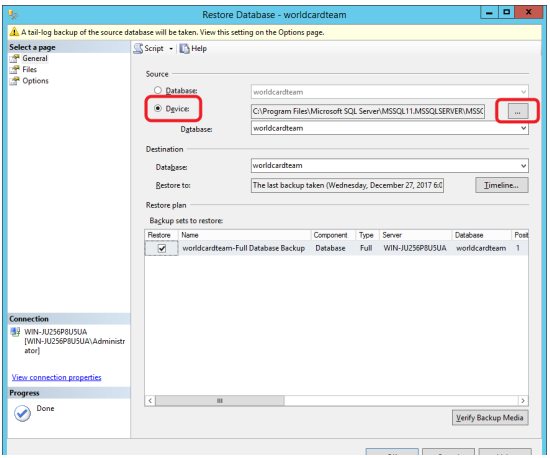
that you don't want to use anymore; If you are willing to restore on the new server, please skip this step.



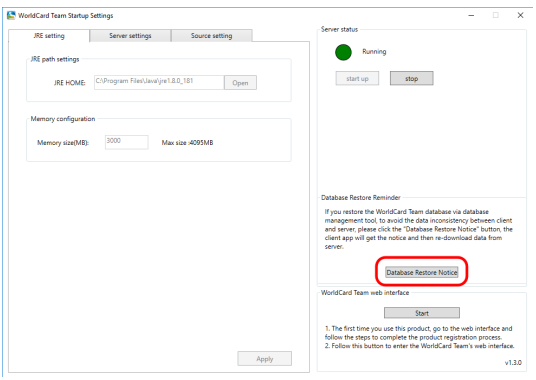
3. Right-click on [Database] in the left pane and select [Tasks \ Restore \ Database].



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



5. After the database is restored, please open [WorldCard Team Server Startup Settings], and after the WorldCard Team service is running, click the [Database Restore Notification] button at the bottom right. At this time, the WorldCard Team server will notify all client software that the database has been restored and needs to compare and update to the restored data on the server.



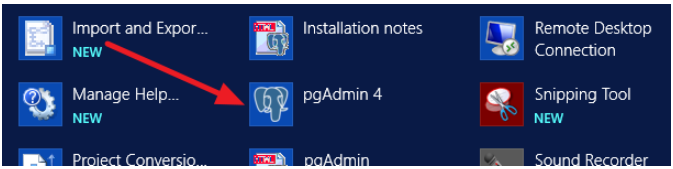
7.3 Back up PostgreSQL Database

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

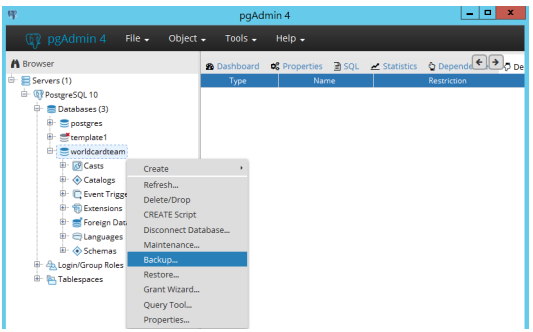
1. Please open [WorldCard Team Server Startup Settings] and stop the WorldCard

Team service.

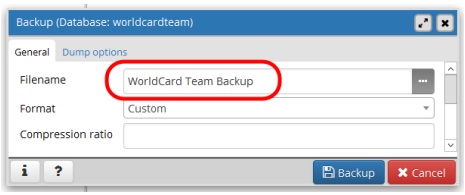
2. Go to the PostgreSQL console by clicking [pgAdmin4] from [Applications].



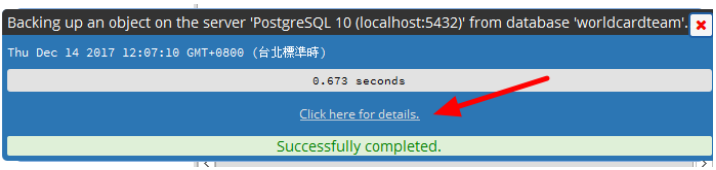
3. Expand [Server \ PostgreSQL 10 \ Datebases] in the left pane and locate WorldCard Team's database [worldcardteam]. Right-click and it select [Backup].

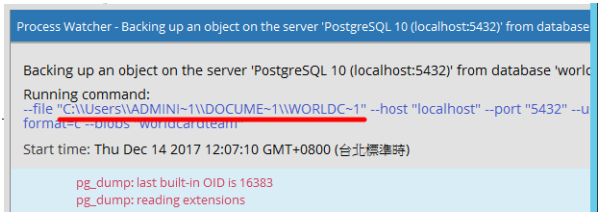


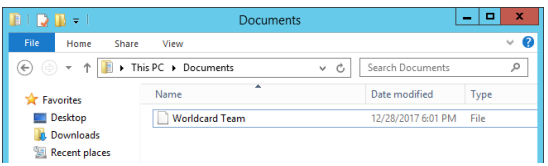
4. Enter the backup database file name for future to identify, and click the [Backup] button, it will start the backup.



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 pop-up message.





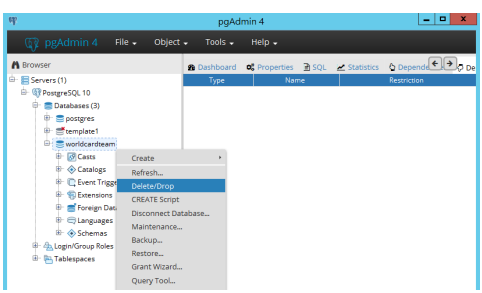


Reminder: The business card images will be backed up together with the database, and will be restored together.

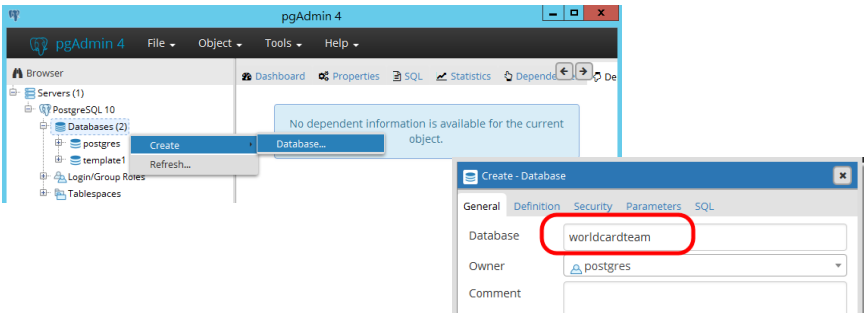
7.4 Restore PostgreSQL Database

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

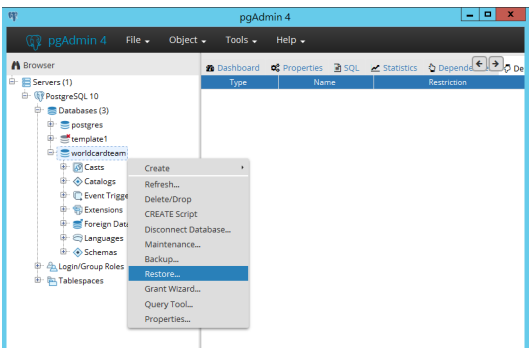
1. Go to the PostgreSQL console by clicking [pgAdmin4] from [Applications].
2. Expand [Server \ PostgreSQL 10 \ Datebases] in the left pane and locate WorldCard Team's database [worldcardteam]. Right-click and it select [Delete] to delete the current database that you don't want to use anymore; If you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



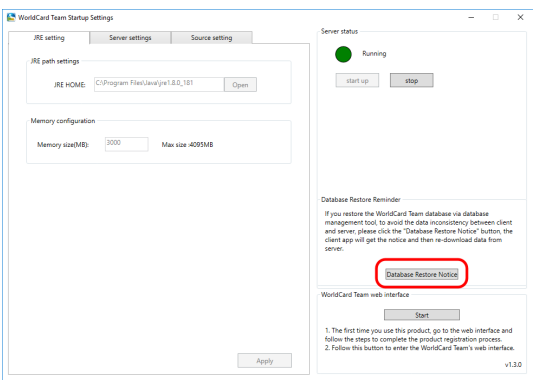
3. Right-click on [Datebases] in the left pane, select [Create \ Database], and set the new database name to the same [worldcardteam].



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



5. After the database is restored, please open [WorldCard Team Server Startup Settings], and after the WorldCard Team service is running, click the [Database Restore Notification] button at the bottom right. At this time, the WorldCard Team server will notify all client software that the database has been restored and needs to compare and update to the restored data on the server.

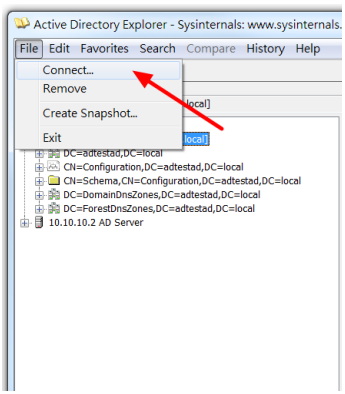


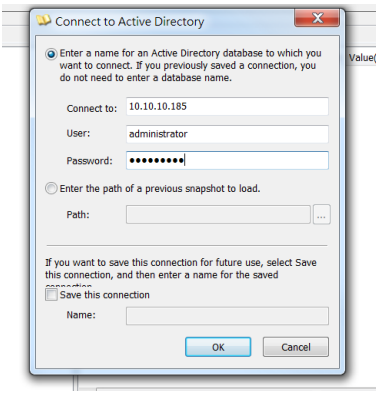
Appendix A: Connecting Information of AD Server

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

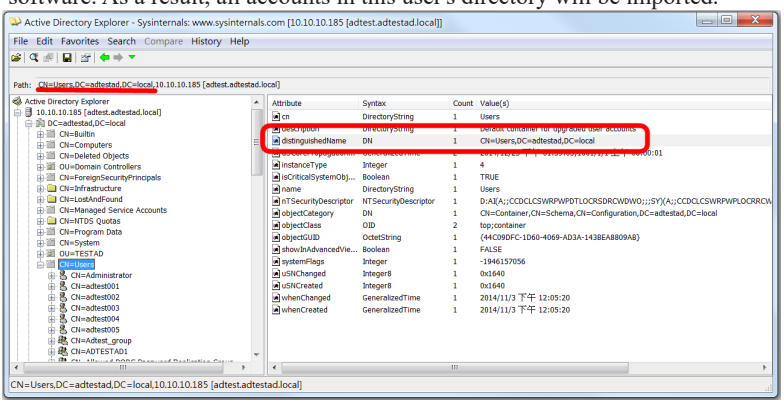
1. Access the URL below to download and install the free AD Explorer tool of Microsoft: https://technet.microsoft.com/en-us/sysinternals/bb963907.aspx
2. Execute "ADExplorer.exe", and Click [File] \ [Connect], and enter the IP address/ Account/password of your company's to connect.

Reminder: This IP address/Account/Password are the required information to fill in when you import the AD accounts to WorldCard Team. Please note the account must be an domain admin account.



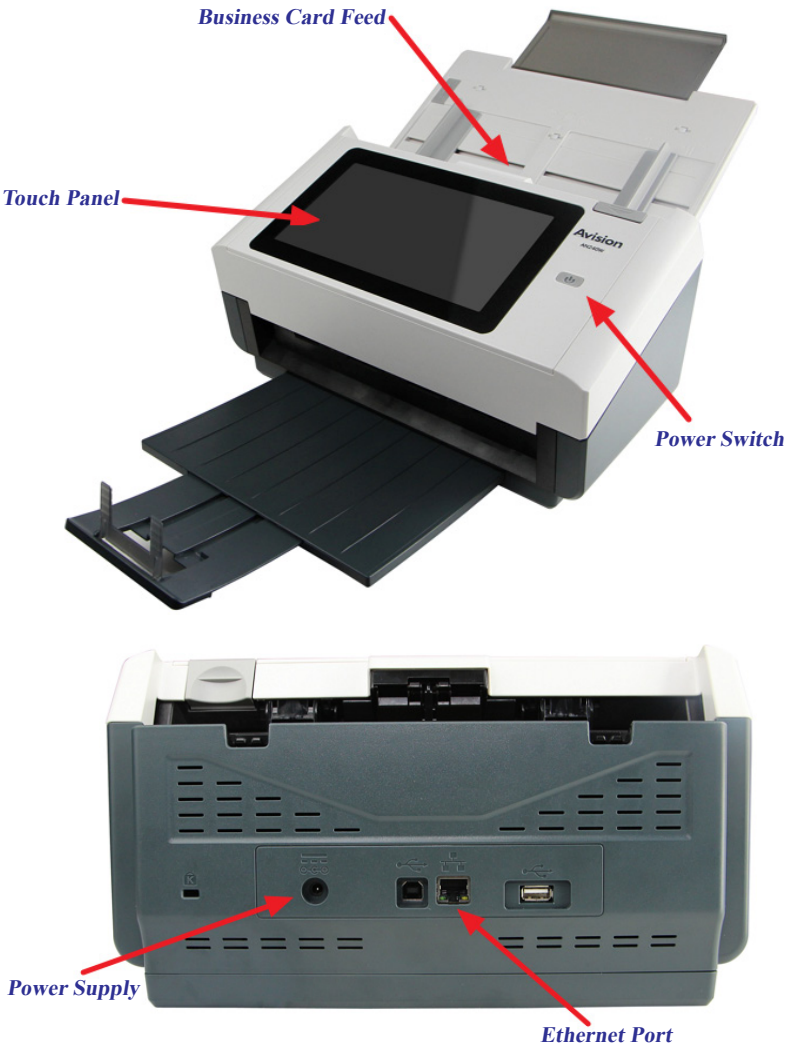


3. Then in the left pane, expand the user directory under the server. As shown in the following image, find the [DistinguishedName] item in the user directory. The value of this item is [BaseDN], which is the information to be filled in WorldCard Team software. As a result, all accounts in this user's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



Appendix B: AN240W Duplex Scanner Instructions (Optional)

B.1 Hardware Function Introduction



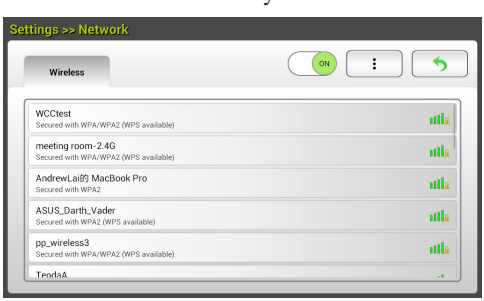
B.2 Installation and Setup

Please connect the scanner power first. To use the cable network, please connect the network cable; to use the wireless network, please refer to the subsequent wireless network settings.

Note: The network that the scanner connected must be in the same local network as the WorldCard Team server.

Please press the scanner's power button to turn it on, when the operation screen appears, it means you can start to use it. Please tap [Settings] on the left menu, then tap [Network]. Here you will see the switch between the wireless network and the cable network. Please choose one of them to continue.

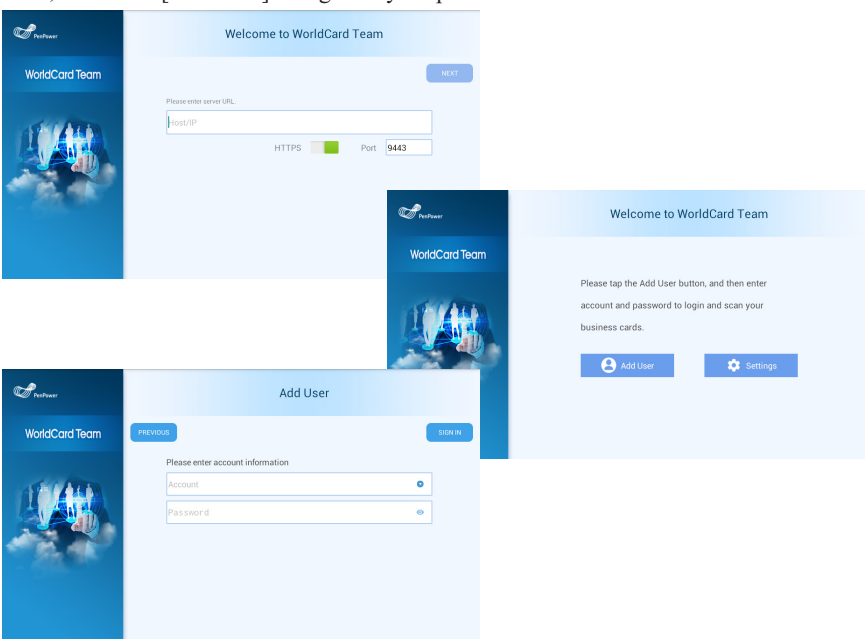
To use the wireless network, tap on the wireless item to enter the connection screen, then you can select the wireless network name you want to connect.



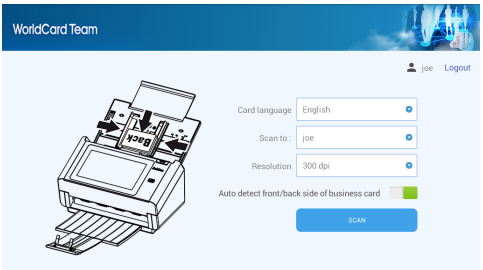
B.3 Start Scanning Business Cards

Please tap [plug-in] on the left menu and select [WorldCard Team] to open WorldCard Team program.

Please enter the IP address of the WorldCard Team server in the start screen, click Next, then click [Add User] to log in to your personal WorldCard Team account.



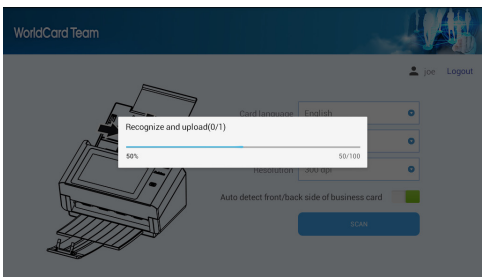
After logging in, please choose the business card language to be recognized, and the user you want to scan to (the default user you scan to is yourself), then you can put the business card horizontally into the business card feed, and tap the [Scan] to scan.



Tips:

1. ***The flaps on both sides of the card placement can be slid and adjusted to an appropriate size, and you can do the batch scanning at one time (up to 80 sheets).***
2. ***The scanner is a double-sided scanning model, so there is no need to concern placing a business card with front or back side face up.***

After scanning, the actions of recognition and uploading to the WorldCard Team server will be performed, and the whole scanning process will be finished after the upload is completed.



* For scanning regular papers, plese refer to the disc documentation included in the scanner package.

WorldCard Team - Windows Server Edition

v1.8 Administrator Manual

Manufacturer: PenPower Technology Ltd.

Release: August, 2022