Card Exchange – Quick Step by Step Guidance

Summary of points covered in this brief guide: -

- How to access card exchange
- How to set up your printer
- How to create an individual record
- How to approve a photo
- How to prepare a card for printing
- How to print a card
- How to bulk upload records
- How to bulk upload photos

How to access card exchange

- Card Exchange Cloud link: [Controller CMS (cardexchangecloud.co.uk)]
- Card Exchange Press – this will be on your laptop as an app. (orange cloud logo)
- The Printer is plug and play, once you connect your laptop to it, it should show on card exchange press, just please make sure you select the correct printer.

How to set up your printer

1. Plug your printer into your laptop
2. Open up Card Exchange Press
3. Select the Configuration tab at the top of app
4. Click on the Import template option
5. Then click on the template file that you were sent in email after training session
6. You only need to do this once at initial set up – you wont need to do this every time you open the app

How to create an individual record

1. Login to card exchange controller – using your email & password
2. On Home screen Hit the (+) button to add record
3. Input mandatory details **

** Mandatory fields

- Person Number i.e Employee number
- Profile Preference i.e type of card needed **
- First and Last name
- Manager Name
- Manager Email
- Position reference (starts with POSN)
- Service Name i.e NLC
- Division Name i.e People & Organisational Development

** Profile Preference

- AH&SC – Social Workers and Mental health Officers

- NLP – North Lan Properties Staff
- Employee – generic – mostly used
- Councillor – elected members
- Env Off – Environmental Officers
- Foster Carer
- Contractor – contractors ONLY

4. Hit continue down the bottom of the screen
5. After hitting continue the address data section comes up
6. Leave this blank and hit continue again
7. You will then go to the Profile data Screen
8. In here, you will be selecting what type of card the employee should have
9. Click Profile > pick whichever profile preference
10. Choose the Department – CEO etc
11. Job title of employee – as per iTrent or whatever employee fills out on form
12. Start Date – effective date of card
13. Status – Activated
14. Save & Exit

N.B please don't input employees email here at the moment employees wont be able to upload their own photos, only admins can, so please leave this blank.

Add a Photo to employee's record

1. Go to People > select the record you have created
2. Double check employees' details match
3. You can then either take a live snapshot from the camera icon, view employees profile picture history **OR** you can select the folder icon to upload from your computer/laptop
4. Once you select the photo, it will give you the option to crop it if you need to
5. Remove any unwanted background if necessary
6. Hit Save.

How to approve a photo

1. Once you have uploaded the photo you should then move to the Photos tab on Card Exchange homepage
2. You will see ones you have uploaded and that are waiting for approval/rejection
3. Double check the photo meets the requirements i.e clear, no filters, head & shoulders
4. If satisfied with it, please press the thumbs up icon on far right of screen

How to prepare a card for printing

1. Once you have approved the photo
2. Go to Production on left hand side of screen on card exchange homepage
3. Select the Approve for production button
4. The record will appear below
5. Click on the left-hand box at the side to select the card
6. Click button on far right which will say 'Approve for Production'
7. This will then approve your card for Printing

How to print a card

1. After moving the card for production go to the Production tab on left hand side of homepage
2. Select ‘Print’ at top of the screen
3. At this point you will need to open up the Card Exchange Printer App (Press) on desktop
4. Login using your Card Exchange credentials
5. Please be aware your PC must be attached to the printer

Card Exchange Press

1. Select the correct card template from the far-left hand side i.e. Employee I.D, Health & Social etc
2. Also select if the card is single-sided or double sided
3. Then select the record of the employee you wish to print beside this
4. A preview should appear for you to see it before you print
5. Once you’re happy with it, select Print on the far right of the screen.
6. Your card is now printed and ready to be distributed to employee(s)

How to bulk upload records

Please use the bulk upload template for this that you were sent after the training session.
For future reference this will be saved on the myNL website under Admin Documents

1. Open the s/s provided
2. Remove the test lines of the s/s as these are just examples
3. Input the correct data under each field – you can see at the top of the s/s what these are
4. After completing and double checking all information save as a CSV file to your desktop
5. Go back on to Card Exchange, and go to People > Upload
6. In here, drag and drop the CSV file you just created.
7. Select the Upload button at the bottom of the screen
8. This will then create all the records on the spreadsheet template

How to bulk upload photos

1. Go to Photos tab then click on the ‘Upload’ section
2. Drag and drop from your desktop/wherever the photo docs are stored and drop them into the area provided on the upload screen
3. Make sure the photo being added has the Employee Reference Number as the File Name i.e 010101
4. Select from dropdown at top right of screen and select ‘PersonNumber’ i.e employee number
5. Then choose ‘Select All’
6. Then choose ‘Upload Selected’ at far right.
7. Your bulk upload of photos will then be uploaded to the system

[end of guidance]