

This Quick User Guide helps you install and get started with **IRISCard™ Anywhere 5** and **IRISCard™ Corporate 5** scanners.

The software delivered with these scanners is:

- **Cardiris™ Pro 5** and **Cardiris™ Corporate 5 for CRM** (for Windows®)
- **Cardiris™ Pro 4** (for Mac® OS)

For detailed information about Cardiris™' full range of features, consult the **help file** provided with the software, or the latest **User Guides** on [www.irislink.com/support/userguides](http://www.irislink.com/support/userguides).

The descriptions in this guide are based on the Windows 7 and Mac OS Lion operating system. All information is subject to change without prior notice.

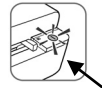
### Table of Contents

1. Using the IRISCard™ scanner
2. Using Cardiris™ on a Windows PC
  - a. Installing Cardiris™
  - b. Starting Cardiris™
  - c. Registering Cardiris™
  - d. Using Cardiris™
3. Using Cardiris™ on a Mac OS computer
  - a. Installing Cardiris™
  - b. Starting Cardiris™
  - c. Registering Cardiris™
  - d. Using Cardiris™
4. IRISCard™ Scanner Reference Information
5. FAQ and Technical Support

## 1. Using the IRISCard™ scanner

**Before you begin:** charge your scanner for 4 hours.

1. Turn on your computer.
2. Connect the scanner to your computer using the USB cable.
3. The orange light is on while charging.
4. When the scanner is fully charged the orange light goes out. Then disconnect your scanner from the computer.



### Preliminary note:

The IRISCard™ scanner is designed to be used on its own, disconnected from any computer. The documents you scan are stored in the scanner's **internal memory** (or optional SD card / USB flash drive). From there they can be loaded into the Cardiris™ software, as explained below in topics 2.4 and 3.4.


So, note that the IRISCard™ is not a Twain-based scanner that can be used from within any application to scan documents. Instead, think of it as a USB storage device that is able to scan independently.

### Scanning cards:

#### Step 1: Press the power button

- The green light blinks a few seconds then remains on.
- The scanner is now ready.



 Refrain from scanning photos while the green light is blinking!

#### Step 2: Scan your business cards

- Insert your business cards facing up.
- Use the paper guide to align the business card with the scanner.



When scanning, the green light blinks.

Wait until the green light stops blinking before inserting a new card.

Your business cards are now ready to be loaded into Cardiris™.

## 2. Using Cardiris™ on a Windows PC

### 2.1 Installing Cardiris™

Before you begin, make sure you have the necessary administration rights to install the software.

- Insert the **Cardiris™** CD-ROM in the CD-ROM drive of your computer.
- When the **AutoRun** window appears, click **Cardiris™** to start the Installation Wizard.
- Click **Next** and follow the on-screen instructions.



If the **AutoRun** window does not appear:

- Go to **Computer** > CD-ROM Drive.
- Double-click the CD-ROM Drive, and then the Cardiris™ folder. Double-click **Setup.exe** within to start the Installation Wizard.

### 2.2 Starting Cardiris™

During installation, a Cardiris™ program shortcut was created on your Desktop.

- Right-click the shortcut and click **Run as administrator** to start Cardiris™ for the first time.

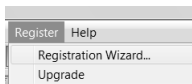


## 2.3 Registering Cardiris™

It is recommended you register your copy of Cardiris™. Registering is required to get Technical Support.

Registering also offers other benefits such as product updates and discounts on future products.

- On the **Register** menu, click **Registration Wizard**.
  - Then follow the on-screen instructions.
- Note that an internet connection is required to register.



## 2.4. Using Cardiris™

In this section we cover the **basic processing steps** in Cardiris™.

Follow these steps in order to create a new database, load and recognize your business cards and export them to your favorite applications (e.g. Google Contacts™, \*Salesforce™ CRM, \*Microsoft Dynamics CRM)

\*Corporate version only.

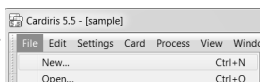
### STEPS OVERVIEW

- 1 Create a new database
- 2 **Load** your business card images
- 3 **Recognize** the business cards and turn them into contacts
- 4 **Export** your Contacts
- 5 **Export** your Contacts to the Cloud

#### Step 1: Create a new database

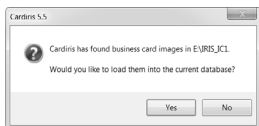
On the File menu, click New to open a new, empty database. Then click Save as on the File menu to save the new database.

Any changes you now make in the database are saved automatically.

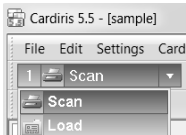


#### Step 2: Load your IRISCard™ images

1. Connect your IRISCard™ scanner to your computer and power on the scanner.
2. Cardiris™ detects if card images were scanned to the scanner memory. Click **Yes** to select them. Cardiris™ then opens the right folder.



**Tip:** to load other images at a later time, click the down arrow next to **Scan**, and select **Load**. Now click the **Load** button to load images

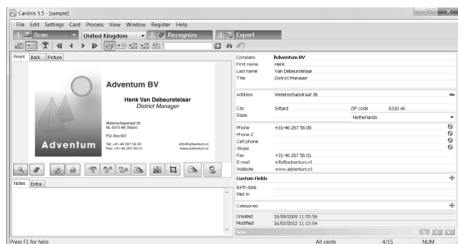


#### Step 3: Recognize your business cards and turn them into contacts

1. Select the country of your business cards in the dropdown list.
2. Select the cards you want to recognize.
3. Then click **Recognize**.



4. The information on the card is assigned to the corresponding data fields. Double-click a card to check the results.



#### Tips:

The results can be edited by typing, moved from one field to another by **cut-and-paste** and **drag-and-drop**.



You can also assign **categories** to contacts and create **custom fields**.



### Step 4: Export your Contacts

Your Cardiris™ contacts can be exported to numerous applications: Microsoft Outlook, Windows Contacts, Microsoft Excel and so on.

1. Select the cards you want to export.

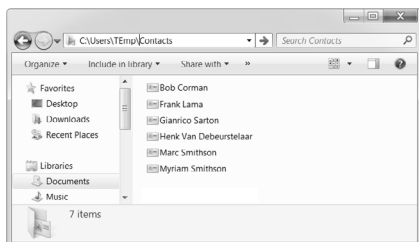
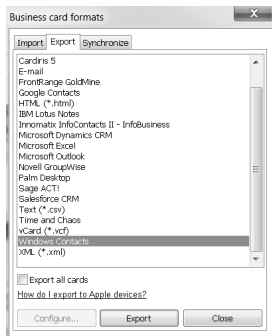
2. Then click **Export**.



3. Select the **Export** application of your choice, and then click the **Export** button. Use the **Configure** button for additional options.

#### Example: Windows Contacts

Your contacts are now stored as Windows contacts



For detailed information about the **Export** options, refer to the **help file** provided with the software.

## Step 5: Export your Contacts to the Cloud (Cardiris™ Corporate)

With Cardiris™ Corporate you can also export contacts to Cloud CRM applications such as Salesforce CRM and Microsoft CRM online.

### Example: Salesforce CRM

1 Select **Salesforce CRM** in the **Export** list.

2 Then click **Configure**.



Note that the **Configure** button is only available if you have the necessary administration rights on your computer.

3 Enter your **username** and **password**.

Note that that an **Enterprise**, **Unlimited** or **Developer** Salesforce account is required.

4 Enter the **Security token** you obtained from Salesforce and click **OK**.



## 3. Using Cardiris™ on a Mac OS computer

### 3.1 Installing Cardiris™

Before you begin, make sure you have the necessary administration rights to install the software.

- Insert the **Cardiris™** CD-ROM in the CD-ROM drive of your computer.
- Open the CD-ROM icon on the desktop, then run the **Cardiris™ installation package**.
- Click **Next** and follow the on-screen instructions.

### 3.2 Starting Cardiris™

During installation, a Cardiris™ program shortcut was created on the Dock.

- Click the shortcut to start Cardiris™.



### 3.3 Registering Cardiris™

It is recommended you register your copy of Cardiris™. Registering is required to get Technical Support. Registering also offers other benefits such as product updates and discounts on future products.

- Click **Register Cardiris™** on the **Help** menu. You will be directed to the registration web page.
- Then follow the on-screen instructions.

### 3.4 Using Cardiris™

In this section we cover the **basic processing steps** in Cardiris™.

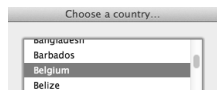
Follow these steps in order to load and recognize your business cards save them to the Address Book and export them to your favorite applications (e.g. Mail, iWork® applications)

## STEPS OVERVIEW

- 1 Select the country of your business cards
- 2 **Load + Recognize** the business cards and turn them into contacts
- 3 **Save** your contacts to the Address Book
- 4 **Export** your Contacts

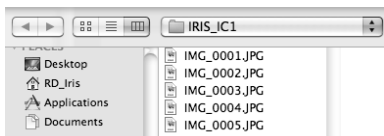
### Step 1: Select the country of your business cards

1. Click the globe icon.
2. Then select the required country from the list

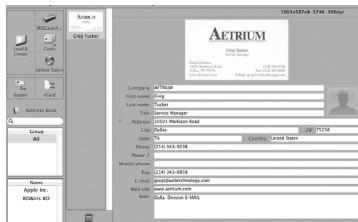


### Step 2: Load + Recognize the business cards and turn them into contacts

1. Connect your IRISCard™ scanner to your computer and power on the scanner.
2. Cardiris™ opens the scanner memory folder. Select the business card to load, then click **Open**.



3. The business cards are recognized automatically. The information on the cards is assigned to the corresponding data fields. Now check the results.



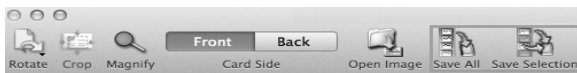
**Tip:** The results can be edited by typing, moved from one field to another by **cut-and-paste** and **drag-and-drop**.

**Tip:** To load other images at a later time, click **Load and Create** and browse for the images to open.



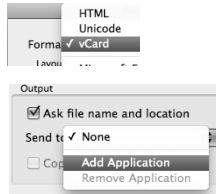
### Step 3 Save your Contacts to the Address Book

Select the contacts you want to save, and then click **Save Selection**. Or click **Save All** to save all cards to the Address Book.



### Step 4 Export your Contacts

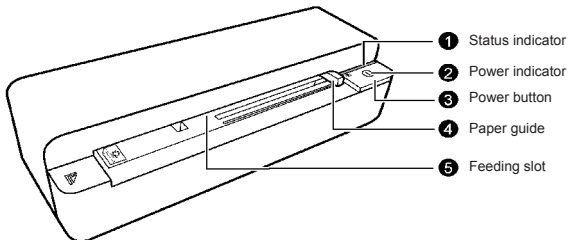
- Click the format icon to select the format and (optional) output application.
- Select the required format in the **Format** list.



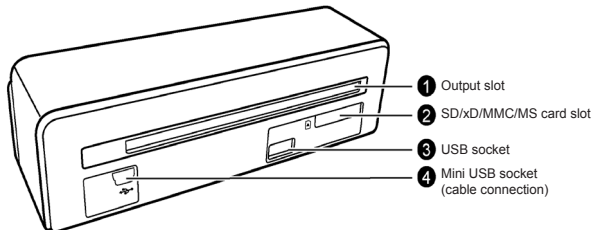
- Then click **Add application** in the **Send to** list if you want to export your contacts directly to one of your applications. Then browse for the required application.
- Click **OK** to save the settings.
- Then click **Export** to export your contacts.

## 4. IRISCard™ Scanner Reference Information

### Front view



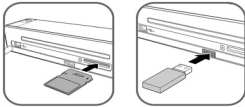
### Rear view



## Scanner memory

The scanner has a built-in 512MB memory.

An SD card and standard USB flash drive can also be used to increase the storage capacity.

























When storing images, the scanner uses the three possible memory types in the following priority order:

**USB flash drive > Memory card > Built-in memory**

## Light indicators

Refer to the table below to view the lighting patterns of the Power and Status indicators.

	Power	Status	Description
			Scanning current original.
			<ul style="list-style-type: none"> <li>When the scanner is connected to a computer: the battery is fully charged and the scanner is ready for use.</li> <li>or</li> <li>When the scanner is not connected to a computer: the scanner power is on and the scanner is ready for use.</li> </ul>
			<ul style="list-style-type: none"> <li>The scanner is powered off.</li> <li>The battery is fully charged (when scanner power is off and connected to a computer).</li> </ul>
			<ul style="list-style-type: none"> <li>Initializing system and memory devices.</li> <li>Busy storing image file.</li> </ul>
			Reading/writing data in the scanner memory or storage devices.
			<ul style="list-style-type: none"> <li>Paper jam. Press the Power button.</li> <li>Calibration error. Please refer to the complete User Guide.</li> </ul>
			Memory card full (free space below 1MB), card error, card locked or file system not supported. Please use another card, delete some files from the card, unlock the card or re-format the card to the FAT16 or FAT32 file system.
			The battery power is low.
			The battery power is extremely low. Charge the battery immediately.
			The battery is being charged when scanner power is off.
			The battery is being charged when scanner power is on.



## 5. FAQ and Technical Support

Should you experience issues when using Cardiris™ or the IRISCard™ scanner consult the Frequently Asked Questions on our website [www.irislink.com/support/faq](http://www.irislink.com/support/faq) or contact Technical Support at [www.irislink.com/support](http://www.irislink.com/support).