

Badges & Barcodes in Certain

This document is a guide to configuring and generating badges in Certain. It describes the **Badges V2** module.

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Introduction

Badges V2 versus V1

Badges V2 provides much more than the older Badges V1 module which it replaced: multiple badge layouts per event; multiple barcodes per badge layout; more bar code formats (including QR codes), which you can also use in email templates; profile pictures; emailing badges to attendees; the choice of generating PDF or printing to an attached printer; and more.

(Badges V1 does remain available for use *instead* of Badges V2 in an event. For full details, see the Badges V1 topic in the online Help.)

Enabling Badges V2 for an Event

Follow these steps to enable the **Badges V2** module for an event.

1. Go to Settings > Options.
2. Select Badges Module,
3. and below that, select **Badges V2**.

(If the **Badges** module is not available, an administrator can check that it is enabled at the account level, by going to Account Settings > Implementation > Products. If it is not, please contact Certain for more information about whether it should be included.)

Configuring Barcodes

If your badges are going to include barcodes, you first need to configure those barcodes, as described here.

(If your badges won't include any barcodes, skip ahead to **Configuring Badge Layouts** on page 3.)

Note: The barcodes you use here can also be used in Email Templates, 100% independent of badges.

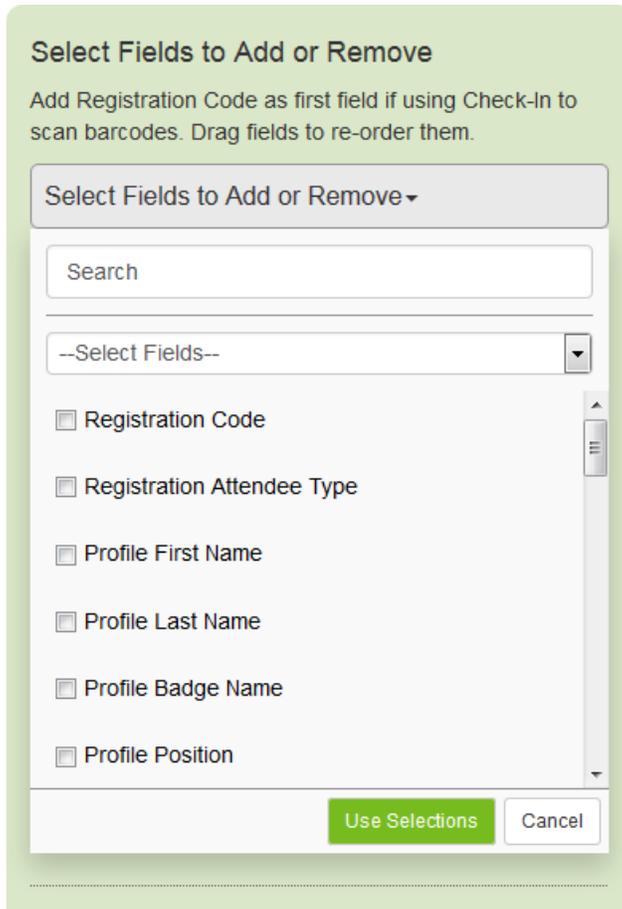
To configure a barcode, follow these steps:

1. Go to the event, click **Manage** on the Top Navigation Bar, and select **Badges and Barcodes**.
2. Click **Barcodes** in the left navigation panel, to open the **Barcodes** page.
3. Select a **Barcode Data Format**:
 - a. **Simple Format** – A delimited string, or
 - b. **Advanced Format** – This default format uses a key-value pair to encode the fields in the barcode. If you'll be scanning for more than Registration ID, use this format.
4. Click **Add New** to add a barcode.
5. Give the barcode a unique **Barcode Name**.
6. Select the **Barcode Format Option**. (For example, **QR Code**.)

The format must match the barcode scanners to be used.



7. Select the **Fields** to include in the barcode.



Select Fields to Add or Remove

Add Registration Code as first field if using Check-In to scan barcodes. Drag fields to re-order them.

Select Fields to Add or Remove ▾

Search

--Select Fields-- ▾

- Registration Code
- Registration Attendee Type
- Profile First Name
- Profile Last Name
- Profile Badge Name
- Profile Position

Use Selections Cancel

8. If you are using **Certain Check-In** to scan barcodes, you must include **Registration Code** or **Profile External Id**.
 - For **Simple Format** barcodes, include **Registration Code** as the first field.
 - For **Advanced Format** barcodes, include **Registration Code** or **External Id** in any position.
9. Click **Use Selections**.
10. The selected fields are shown in a list. Drag  to reorder the fields, if necessary.
11. Select a **Barcode Delimiter** if the barcode type requires one, and you want to use a character such as \$ instead of the default comma.
12. Click **Save** when the barcode is complete.

The **Barcode List** is displayed, including the new barcode. Repeat the process for any more barcodes required.

Barcodes in Email Templates

The barcodes you configure here can be used in email templates, quite independently of badges.

To do so, when you've configured at least one barcode, as described above:

1. Go to **Communication > Email Templates**.
2. Add or edit an email template.
3. Select the relevant barcode under **Barcode Fields** in the list of dynamic data fields.
4. Click **Append** to add it to the message.

Configuring Badge Layouts

To configure a badge layout, start as you did for barcodes: go to the event, click **Manage** on the Top Navigation Bar, and select **Badges and Barcodes**.

By default you are on the **Badges** page.

Initially, the page shows a list of any badges already configured for the event.

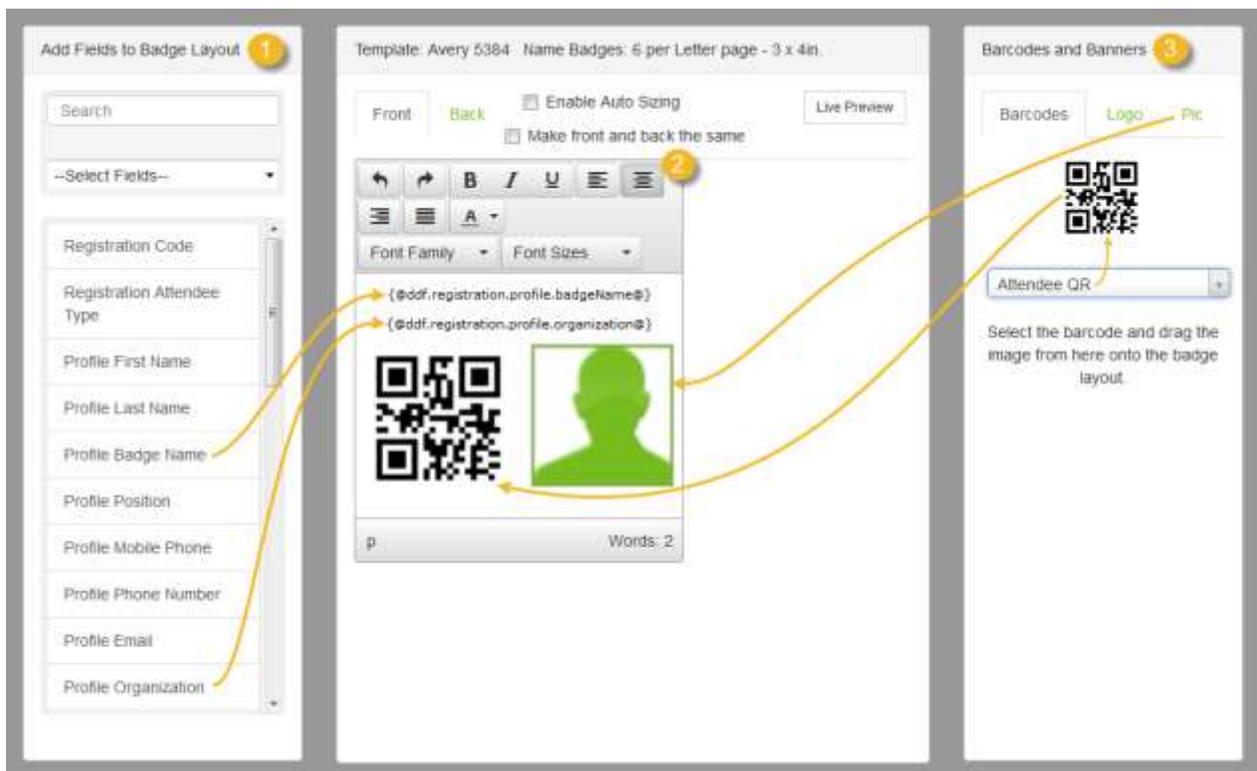
To add a new badge layout, **Add New**, give the badge a unique **Name**, and then configure the layout as described below under **Editing a Badge Layout**

To **edit** an existing badge layout, click  and edit it as described below.

To **copy** a badge layout, click . Type the name of the new badge layout when prompted to "Enter Badge Name", and edit the copy as described below.

When you are adding or editing a badge layout, you do so in the design section illustrated and described below.

Editing a Badge Layout



The screenshot illustrates the badge layout editor interface, divided into three main sections:

- Add Fields to Badge Layout (1):** A panel on the left containing a search bar and a list of dynamic data fields such as "Registration Code", "Registration Attendee Type", "Profile First Name", "Profile Last Name", "Profile Badge Name", "Profile Position", "Profile Mobile Phone", "Profile Phone Number", "Profile Email", and "Profile Organization".
- Template (2):** A central design area for the badge. It shows a "Front" view of a badge template (Avery 5384) with a QR code and a photo placeholder. A rich text editor toolbar is visible above the design area. Dynamic data fields are mapped to the design elements: "Profile Badge Name" is mapped to the text area, and "Profile Organization" is mapped to the text area below the photo.
- Barcodes and Banners (3):** A panel on the right showing a list of available barcodes and banners. A "Barcode" is selected, and a "QR" code is visible. A dropdown menu shows "Attendee QR". Below the list, there is a instruction: "Select the barcode and drag the image from here onto the badge layout."

As illustrated above, the design section consists of three columns:

1. **Add Fields to Badge Layout** – a list of dynamic data fields you can add to a layout. See page 5.
2. **Layout Editor** – the unlabeled white box, with toolbar (and above that, a template selector). See page 6.
3. **Barcodes and Banners** – with tabs for **Barcodes**, **Logo** (i.e., any images), and **Pic** (the attendee's profile picture). See page 7.

Select a Template

First select the **Template** from the drop-down list at the top of the Layout Editor. Most of these are standard Avery templates for badges, adhesive labels, etc., plus a few other standard sizes.

As you select a template, the layout editor below it resizes to match the template size.

Important Note: You cannot change the template you have selected after you have saved the badge layout. You *can*, however, change it while editing a new badge, up until the moment you first click **Save**.

Add Fields to Badge Layout

To add a dynamic data field to the layout, click the spot at which you want to place it, and then click the field in the list on the left.

The fields available include:

Registration Fields Registration Code, Attendee Type, Agenda Sessions.

Profile Fields such as First Name, Last Name, Organization, etc.

Event Fields: Event Name, Event Code.

Profile Questions: Any custom profile questions set up for your account by an Administrator (on Account Settings > Registration > Profile Data).

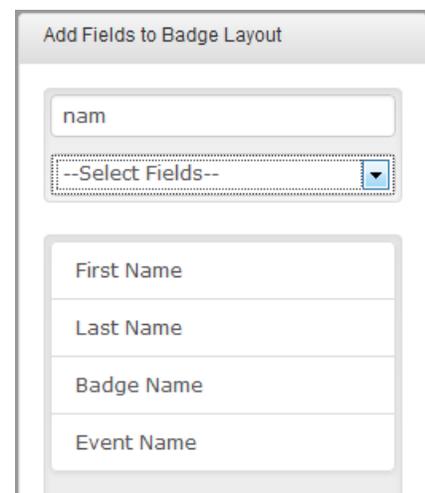
Custom Registration Questions: Any custom registration questions you have set up for the event (on Plan > Event Setup > Questions).

Event Questions: Any custom event questions set up for your account by an Administrator (on Account Settings > Management > Event Data).

You can limit the fields shown in either or both of these two ways:

1. Type part of a field name in the *Search* text box at the top.
2. Select a filter in the **--Select fields--** drop-down list: e.g. Profile, Registration, Event, Profile Questions, or Event Questions.
(If Profile Questions, Custom Registration Questions or Event Questions are not included as filter options, that's because none have been set up.)

For example, typing "nam" would limit the list to four fields: *First Name*, *Last Name*, *Badge Name* and *Event Name*. But then selecting



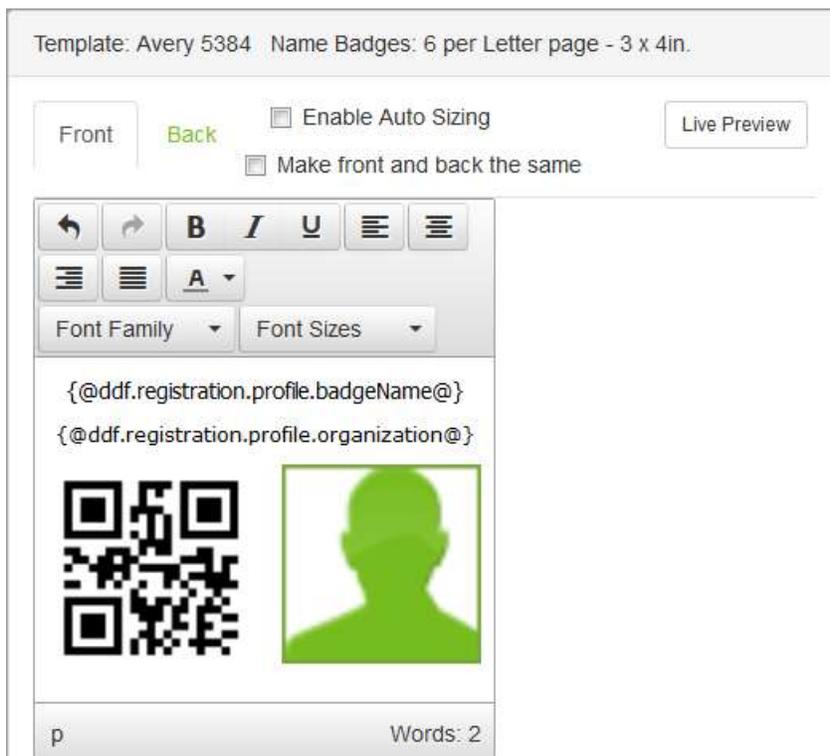
Event as the set of fields would restrict the list further, to just *Event Name* (because that is the only "event field" with "nam" in its name).

Another example: Typing "profile" in the text box, and leaving the filter set to *Select Fields*, would make the list consist of all the Profile fields plus any Custom Profile Questions.

A note about custom questions: If you include custom questions, be sure that the answers will be short enough to fit onto the badge, because answers will be truncated if they are too long to fit.

Layout Editor

In the WYSIWYG Layout Editor, the unlabeled white box in the central column, where you have added data fields, you can format those fields, add and format text, and add barcodes and images.



At any point, you can click **Live Preview** to see an example of the badge as it will look when printed.

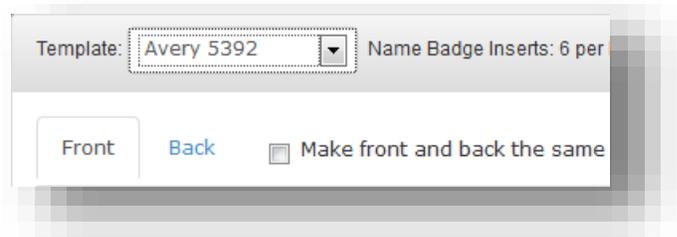
Double-Sided Badges

By default, you are designing the front of a badge, as shown by the by **Front** tab label at the top of the section.

But for appropriate Avery templates, i.e. those for double-sided badges, there is also a **Back** tab in the layout designer.

So when you have finished designing the front, you can:

- click **Back** to design the back of the badge, and



- click **Front** to switch back to designing the front, or
- design only the **Front**, and select the **Make front and back the same** check box.

Auto-Sizing Data Fields

If you select the **Enable Auto Sizing** check box, then a data field shrinks to fit if the selected font size makes the text too large to fit the width of the badge. If the check box is left clear, the text wraps onto the next line, remaining at the selected font size.

Adding Text

Add text to your badge layout by typing or copying and pasting it.

Formatting Data Fields and Text

Format the dynamic data fields you have added above, and the custom text you type or paste, using the usual controls for font family and size, color, bold, italic, alignment, etc.

Barcodes and Banners

There are three tabs within the **Barcodes and Banners** section on the right: **Barcodes**, **Logo**, and **Pic**, as described below.

From each one you can drag an item on to the badge layout, where you can drag its corners to resize it.

Adding Barcodes

To add a barcode (using the **Barcodes** tab of the **Barcodes and Banners** section):

1. Select the barcode in the drop-down list of those configured on **Manage > Barcodes and Banners > Barcodes** – see **Configuring Barcodes** on page 2.
2. Drag it onto the Layout Editor, where you can resize it by dragging its corners.
3. **TIP:** Print a badge to check you can scan it successfully with the scanners to be used at the event.

Adding Logos / Images

To upload a Logo, or other image, to use, click **Choose File** (in the **Logo** tab of the **Barcodes and Banners** section), and find the file on your computer. Then click **Upload Image**.

To use it on a badge, drag it from the **Logo** tab onto the **Layout Editor**.

If you have uploaded multiple images, only one is visible at a time in the **Logo** tab. Click the **<** and **>** buttons to display the others in turn, and drag each one onto the badge layout when it's visible.

Adding a Profile Picture

To include the attendee's profile picture on the badge layout, drag the abstract "headshot" placeholder image from the **Pic** tab of the **Barcodes and Banners** column onto the **Layout Editor**, where you can resize it by dragging its corners.

Providing Badges to Attendees

Once you have saved a badge layout, you can:

1. Output badges to PDF (for multiple or individual attendees).
2. Print badges directly to a printer (also for multiple or individual attendees).

3. Attach badges (as PDF files) to emails so that attendees can use them on their mobile devices, or even print them out themselves.

Printing Badges

To print badges for multiple attendees:

- Run a suitable report, and then on the **Report Results** screen, once you've selected the attendees for whom you want badges:
- select a badge layout under **Print Badges & Labels**, and either
 - click **Go** (to create a PDF), or
 - click **Print Badge** (to print directly to a printer, immediately).

To print an individual badge from a registration record:

- Go to the attendee's **Registration > Overview** page (for example by searching for them, or by clicking their link on a report).
- Click the **Print Name Badge** button, and then
 - Select a badge layout, and either
 - click **Generate PDF** or
 - click **Print** (to print directly to a printer, immediately).

Note:

When a badge is printed, the attendee's **Badge Printed** status is set to **Yes**, and the **Badge Print Date** is recorded and can be used in a report as a data column or as an advanced filter.

Caution:

Select "**100% fit**" in your printer settings when printing badges. Scaling to "fit to size" (or similar) will misalign badges on stationery.

Emailing Badges

To attach a PDF of a badge to an email, so that an attendee can use it on their mobile device (or print it themselves):

1. Go to Communication > Email Templates,
2. create or edit an email template,
3. select **Attach Badge PDF** under **Attachment**, and
4. select the badge layout to use.

5. Any emails sent using that template will have a PDF attachment of the attendee's badge.

On-Demand Badges

In addition to the standard badges described above, you can configure **On-Demand Badges**, which you can print from **Certain Check-In** (or via a **Mass Action** for selected registrations in a **Report Results Window**).

Note that you can only set up **one** on-demand badge per attendee type (so that Certain Check-In will know which badge to print for an attendee).

To add your first on-demand badge:

1. In the event, go to **Manage > Badges and Barcodes > On-Demand Badges**.
2. Click, **Add New**.
3. Give the badge a name, for example "Buyer Badge" or "Exhibitor Badge".
4. Select the **Attendee Type**.
5. Click **Save**.

The **Badge Layout** screen opens for you to design the badge.

Choose Your Badge Size, by clicking one of the standard sizes illustrated, such as 3.9" x 2.4" or 3.8" x 5.6"; or click **Add Custom Size** to specify your own size. (Maximum 8.5" x 11", minimum 1" x 1".)

Note that if you create a custom size, it is then available for use on other badges.

Under **Basic Elements**, click dynamic data fields (DDFs) to add them to the layout. There you can drag them into position, resize them, and format the text.

Under **Barcode** you can select a barcode from the list of those set up on **Manage > Badges and Barcodes > Barcodes** (see page 2). That adds the barcode to the layout where you can move and resize it.

To add an image, such as a logo, click under **Image** to select an image from your PC and add it to the badge, where you can move and resize it.

To add free text, such as an event slogan, click **Static Text** to add a text box to the badge. Type in the text box, drag and resize it, and format the text, just as you can for the data fields in **Basic Elements** above.

While you configure the badge, the **Layout** shows the badge layout as it changes.

Click **Preview**  to display a pop-up preview with the field names (such as "[Profile Badge Name]") replaced by the values (such as "John Citizen") from the first attendee record.

Click **Save** to save the layout and return to the [Badges List](#).