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BADGEMAKER

QUICK START MANUAL BY SCREENCHECK

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www.badgemaker.info

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Introduction

Welcome and thank you for using BadgeMaker.

BadgeMaker is desktop-based card production software developed to design card layouts, manage, add or import card data, capture photos and signatures and printing a card with one click of a button making the card production process quick and easy.

BadgeMaker is a combination of two specific modules that each have their own strength. BadgeMaker Design focuses on creating perfect card layouts and BadgeMaker Identity can handle your data with the ease of well-known spreadsheet software.

As a user you can design different types of ID cards or other layouts. Using a design tool that you understand, but still has all the needed functions to make the best design possible.

BadgeMaker Design can be used for all your design setups.

BadgeMaker Design gives you the basic tools to create a front and back design, with images, photo's, drawing tools and dynamic data. You will be able to create a template with placeholders that help determine the layout of dynamic data. For example: where a Passport photo should be placed, a signature or the first and last name of person. Designing one template that can be attached to multiple data records in BadgeMaker Identity will have a great impact on your card production.

As a user you can manage data and layouts for different types of ID cards using different types of printers. BadgeMaker Identity gives you the basic tools to import, add and manage data like personal data, passport photos and signatures. This data can then be connected to a card layout and selected for printing. With BadgeMaker, uploading or printing large amounts of data and cards is possible and makes your card production process an even better experience.

Any Windows PC with a network connection can be used to install the BadgeMaker. This PC needs to have an internet connection to download the installation link, there is also an option to work with an offline version.

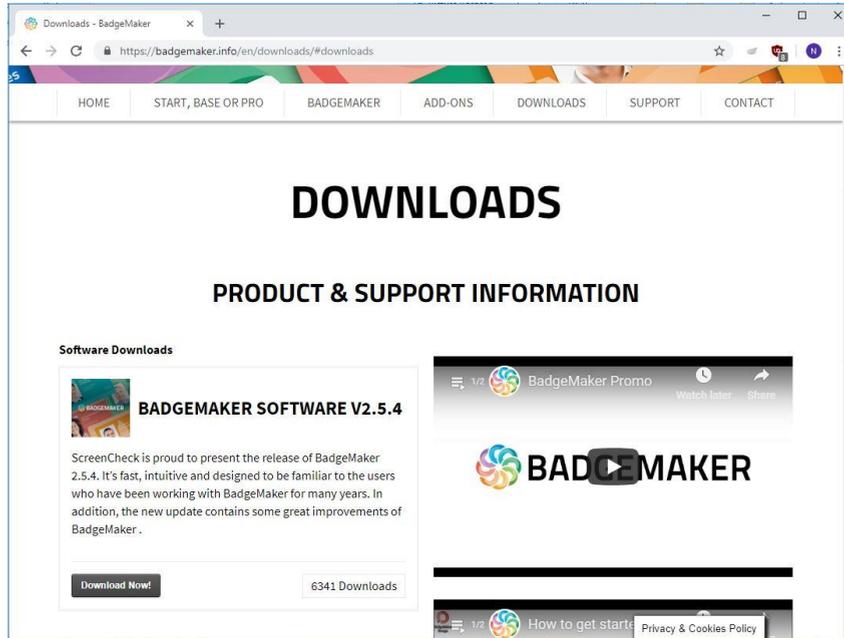
This manual does not describe the installation of printers or other peripherals like a Camera or Signature Pad. Please refer to the manufacturers manuals for further information on these devices.

Step 1: Download and install the Badgemaker software

Download

The Badgemaker program can be downloaded via:

<http://badgemaker.info/downloads>



Click on the download button

This will download the installer file that will look like this:



Double clicking on this installer will open a pop-up window. This pop-up will ask if you are sure you would like to run the installer. Clicking on the run button will start the Badgemaker installation program.

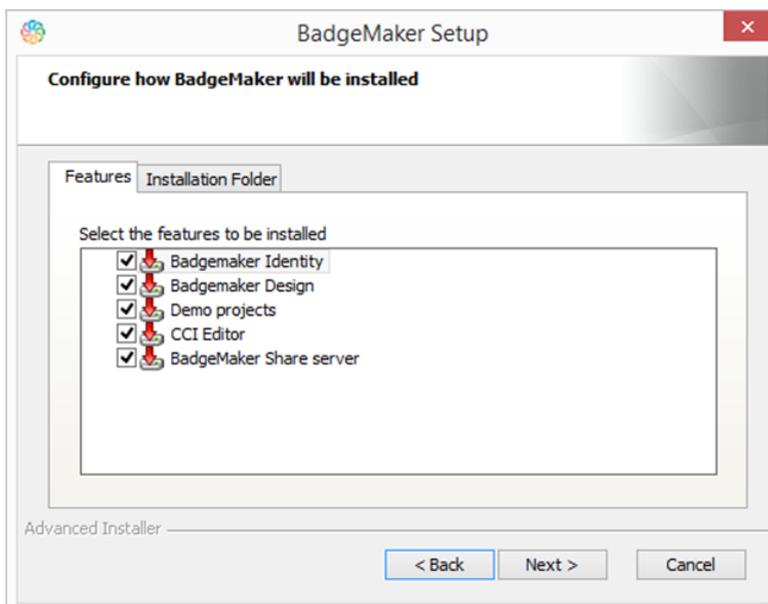
Install BadgeMaker

Step 1. If you would like to run the installer and setup BadgeMaker on your system, click the “Run” button. If you do not want to install BadgeMaker, click on the “Cancel” button.

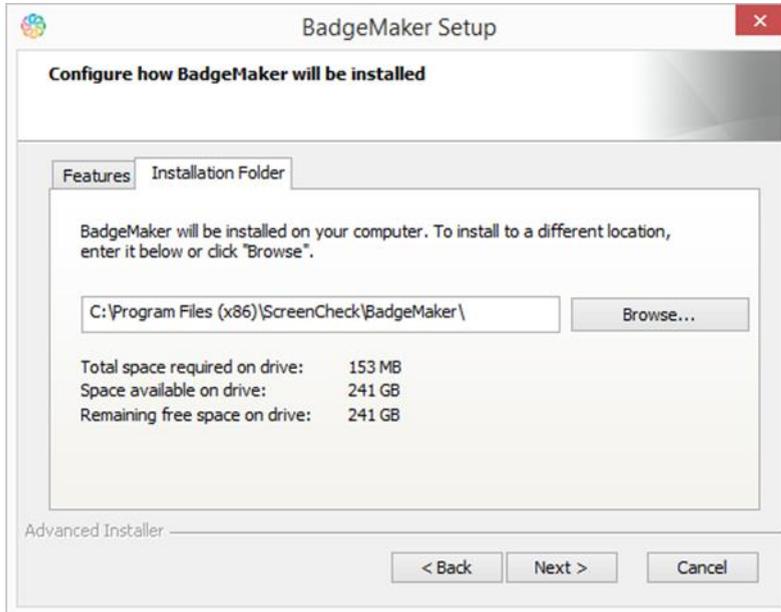
Step 2. Click on the “Next” button to continue the installation of BadgeMaker.



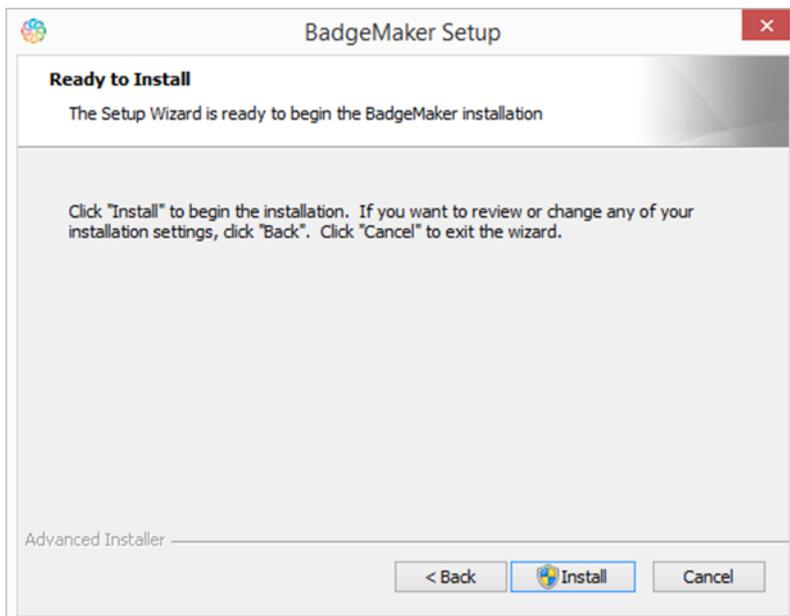
Step 3a. The “Features” tab: This step in the installation process is to select how you would like to install BadgeMaker. You can select the features you would like to install. BadgeMaker Design, Identity, Demo projects and the CCI Editor are selected by default. If you would like to only install Identity or Design just un-tick the boxes of the features you do not want to install.



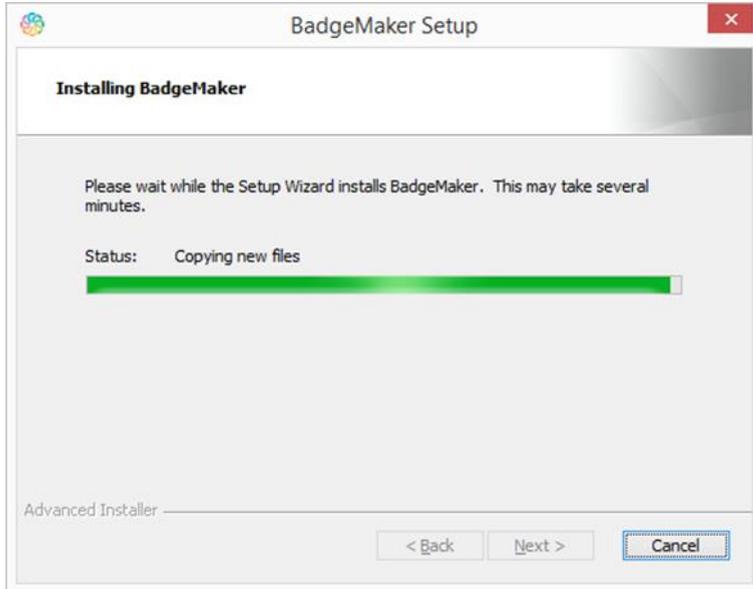
Step 3b. The “Installation Folder” tab: The third step in the installation process is selecting the location where you would like to install BadgeMaker. You can select this by clicking on the browse button and browsing to the desired location. If you do not have a specific location for BadgeMaker you can retain the default location.



Step 4. The installer is now ready to begin the BadgeMaker installation. Click the “Install” button to begin the installation. If you want to review or change any of your installation settings, click on the “Back” button. Click “Cancel” to exit the installer.



Step 5. The installation is now in process. This can take a couple of minutes. A pop-up window will appear to make sure that you want to run the installation.



Step 6. The installation is complete click the “Finish” button to exit the installer.



Step 7. After completing the installation four shortcut icons will appear on your desktop.


BadgeMaker
Design

To start with creating a new card layout click on the “**BadgeMaker Design**” icon.


BadgeMaker
Identity

To start with adding card data click on the “**BadgeMaker Identity**” icon.


BadgeMaker
Share server

To start with the setup of the Share Server click on the “**BadgeMaker Share Server**” icon.
Be aware that you need a share server license key for the share server to work.


CCI Editor

If you would like to create an encoding file click on the “**CCI Editor**” icon.

Before you will be able to start you will need to register first.

Step 2. Register and activate the Badgemaker software

Registration

At the first start-up of Badgemaker Design or Identity a register window will pop up, so you can register your Badgemaker.



Fig. Example of the Badgemaker register window.

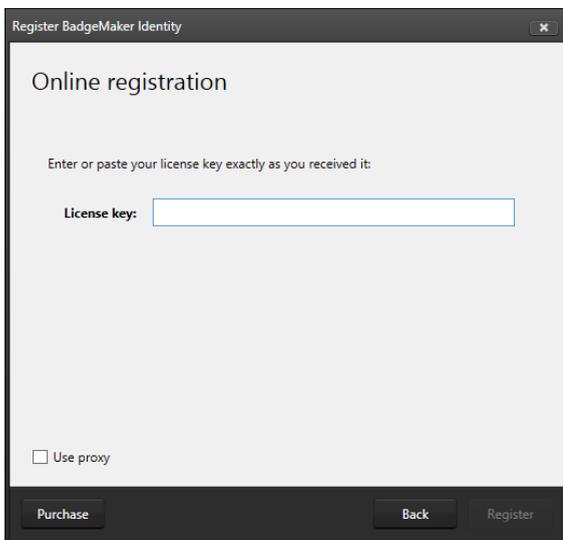
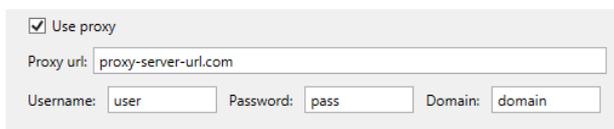


Fig. Example of the Badgemaker online registration license key window.



A. The first question will be about online or offline registration. Select the one that is applicable to the license you purchased.

Most of the licenses will be for online registration. No access to the internet to activate your license keys? We offer offline license keys. You can request your local reseller for offline license keys.

B. Online Registration

You will be requested to enter a License Key. The License key will be provided by our License Manager. Click on the “Purchase” button to get your License Key or visit:

<http://licensemanager.badgemaker.info>

The License Key must be entered (copy-paste) and when the key is valid the software will start. Next time the software will not require the License Key to be entered.

Test keys can have a time restriction and may expire on a given date. (View the License Manager User Guide for more information on License Keys).

Check the “Use Proxy” box and enter the information needed to connect through a Proxy server in your network.

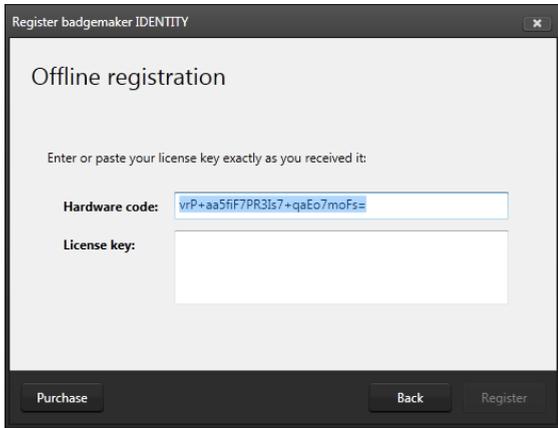


Fig. Example of the BadgeMaker offline registration window.

C. Offline Registration

You will be requested to enter a License Key. The License key will be provided by our License Manager. Click on the “Purchase” button to get your License Key or visit:

<http://licensmanager.badgemaker.info>

An offline license key requires a hardware code. The BadgeMaker offline key registration window provides this. You can copy and paste it in the requested area in the License Manager. With the use of the Hardware code the License Manager provides an offline license key. The License Key must be entered (copy-paste) and when the key is valid the software will start. Next time the software will not require the License Key to be entered. *Be aware that an offline key is a one-off key that is only available for the given hardware ID. The offline key cannot be reset!*

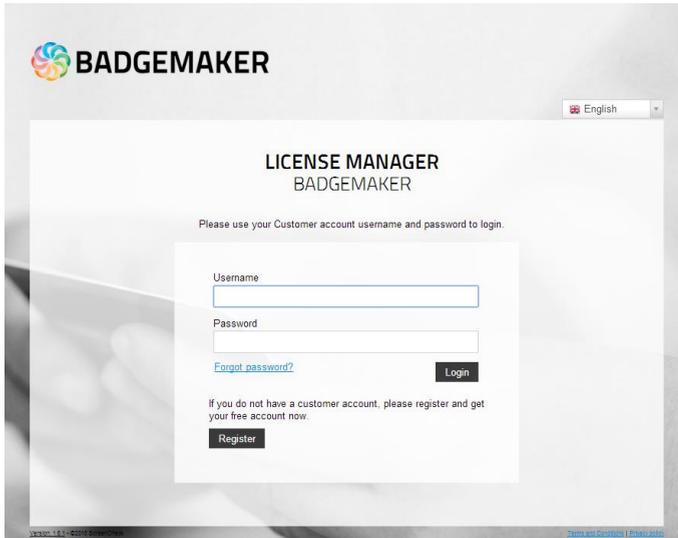
Test keys can have a time restriction and may expire on a given date. (View the License Manager User Guide for more information on License Keys).



Fig. Example of a successful online registration of BadgeMaker.

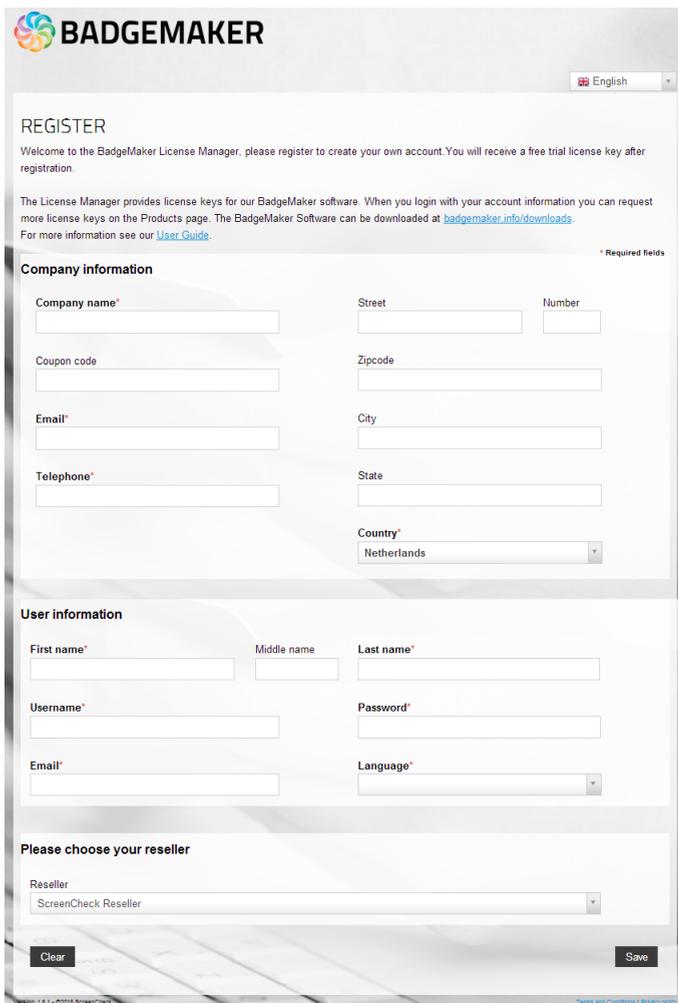
When you copy-paste the correct key you will see that the registration is successful. Click the “Ok” button to start working with BadgeMaker.

How to request and receive a BadgeMaker license key



- A. When visiting the License Manager page you will see the login page first. Log in with your credentials if you are already registered, if not, please register.

Click on the “register” button. A register form will appear.



- B. Enter the information required for registration. Be sure to fill in the correct email address since this is used to send a confirmation email of your registration and contains the activation link.

- C. Activate your License Manager Account by going to your inbox and clicking on “the activation link” in the email sent to you.

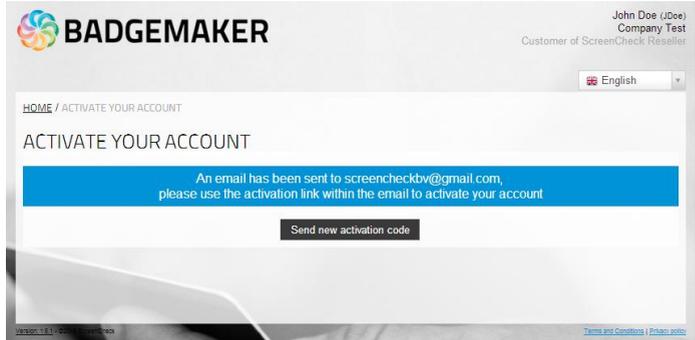


Fig. Screenshot of a License Manager account not activated yet.

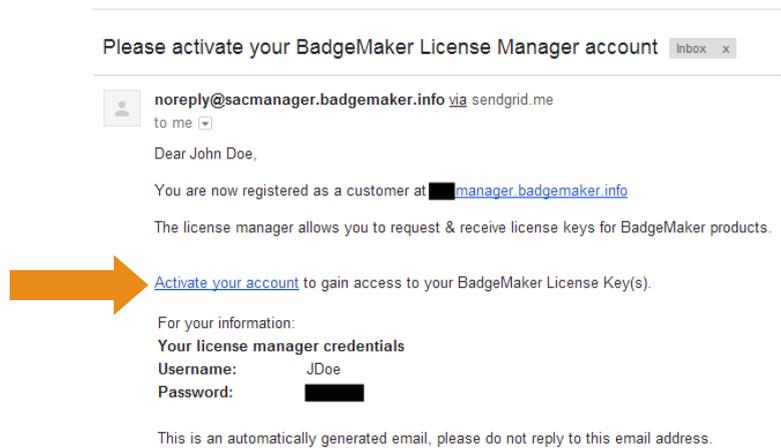
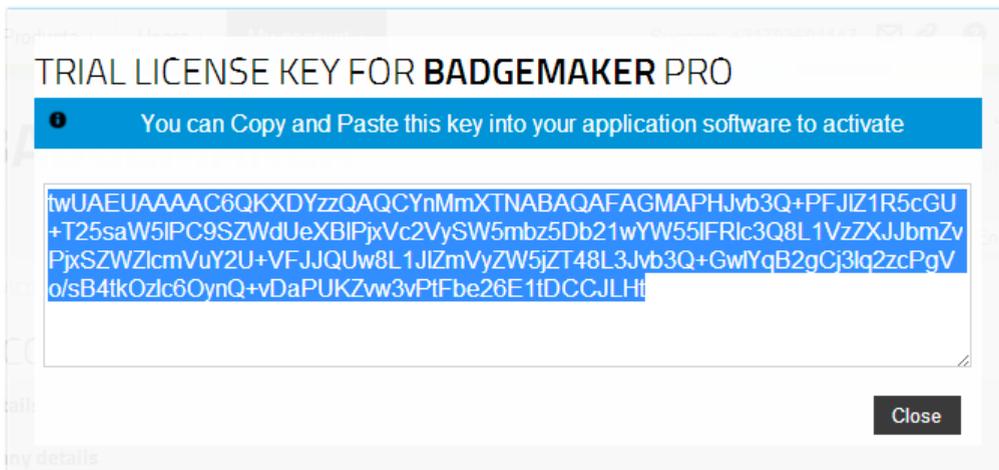
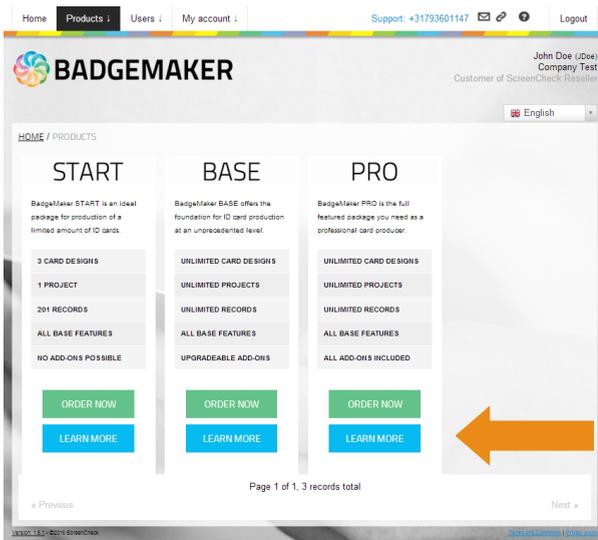


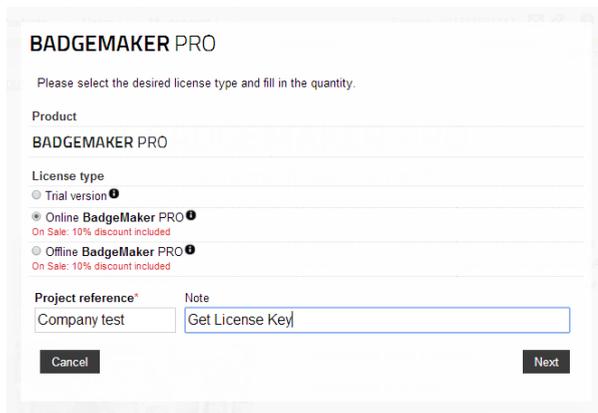
Fig. Example of the BadgeMaker License Manager activation email.

- D. Receive a **Free** BadgeMaker PRO **Trial** License Key after registration. Copy and paste this License Key if you first want to try the software for free. If you want to use a full version click the “close” button and go to the products page.

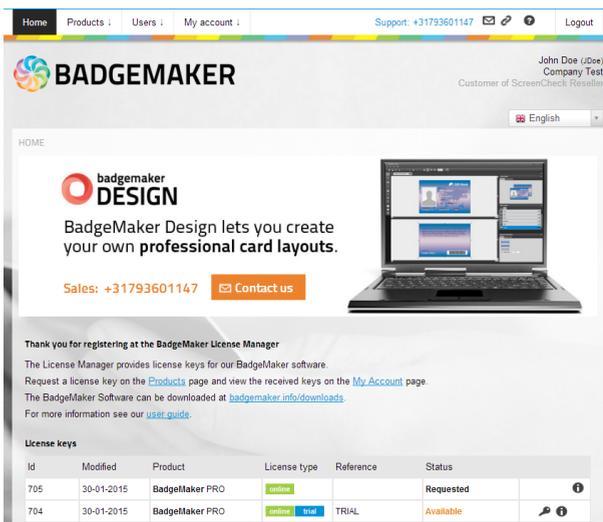




- E. Go to the “Products” page and select the version that fits your needs (START, BASE or PRO). Click on the “Order now” button.



- F. A pop-up appears that gives the option to select the license type (most chosen type is Online). Then enter your reference for this order, click on the “Next” button and then click on the “confirm” button.



- G. Your key is now requested, your Reseller will check your request, when everything checks out the request will be approved. On the homepage of your License Manager account an overview is visible of your received and requested license keys.

- H. As soon as your license key is approved you will receive an email. In the license key overview on the home page the license key status is changed to available. To get your license key, click on the

“key” icon, enter your project reference and copy/paste the key that is selected to the register screen in BadgeMaker.

License keys						
Id	Modified	Product	License type	Reference	Status	
705	30-01-2015	BadgeMaker PRO	online		Available	
704	30-01-2015	BadgeMaker PRO	online trial	TRIAL	Available	 

LICENSE KEY FOR **BADGEMAKER PRO**

 You can Copy and Paste this key into your application software to activate

```
twEAEUAAAAct1ueqaTzQAQBYw6OpPdABAQCBADxyb290PjxSZWdUeXBIPk9ubGI
uZTwwUmVnVHlwZT48VXNlckluZm8+Q29tcGFueSBUZXN0PC9Vc2VySW5mbz48Um
VmZXJlbnNIPkNvbXBhbnkgVGZvdCBMaWNlbnNlEtleSBjb21wdXRlciAxPC9SZWZlc
mVuY2U+PC9yb290Ph2wTn7oNx3ocw9y/fjjoO/G65R1zklOPIJy8C9JCyENEFT4GtxT9f
K3Ssa0ftGojA==
```

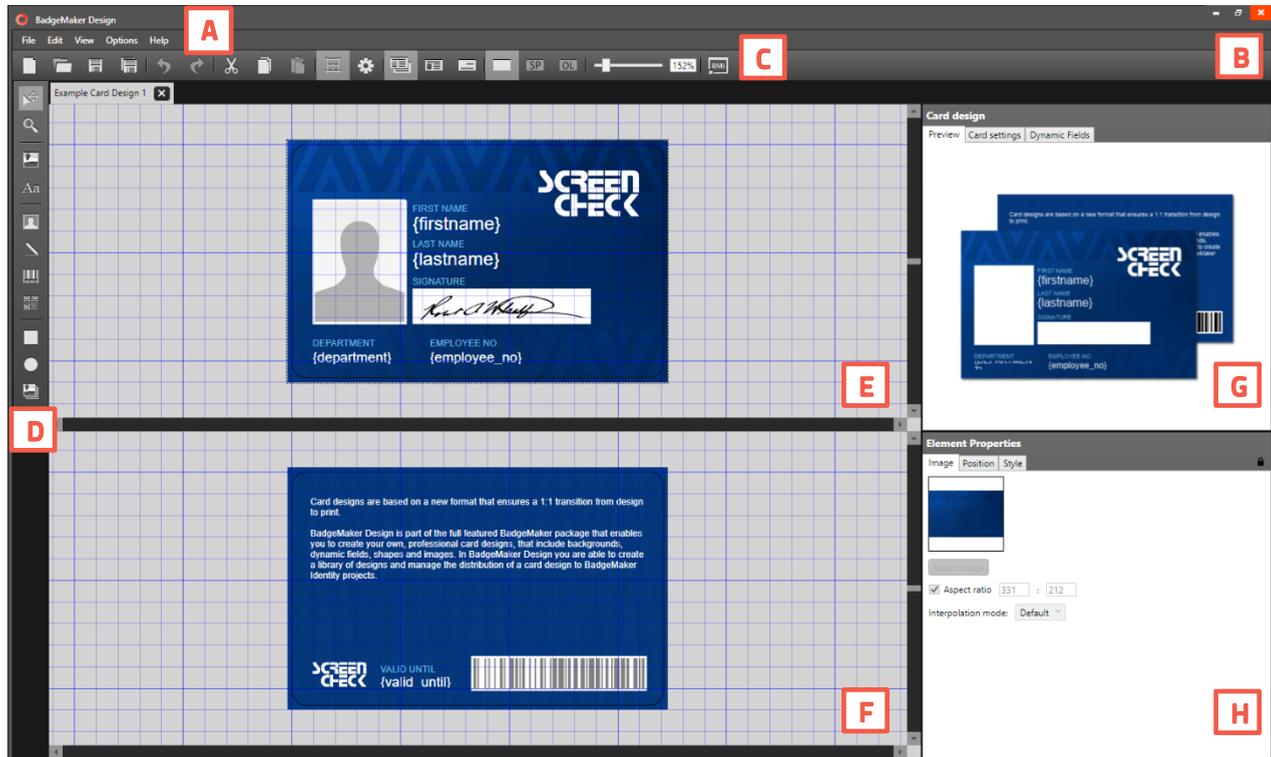
Reference *

Company Test License Key computer 1

Close

Step 3. Design a New Card

Interface

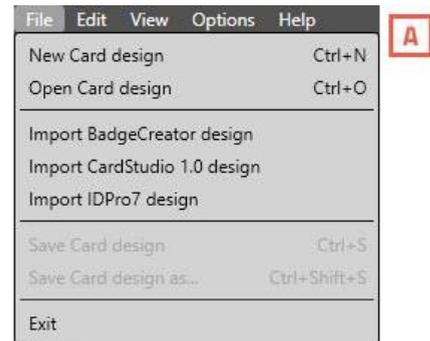


- A. Main menu
- B. Window menu
- C. Quick menu
- D. Toolbar
- E. Workspace/Canvas Front
- F. Workspace/Canvas Back
- H. Card Design: Preview/Card Settings/Dynamic Data Fields
- I. Element Properties

New Card Design

Go to File in the main menu and click on “New Card design”.

Or click on the icon below in the quick menu:



When clicking on the new card design link or button a setup window will pop up.

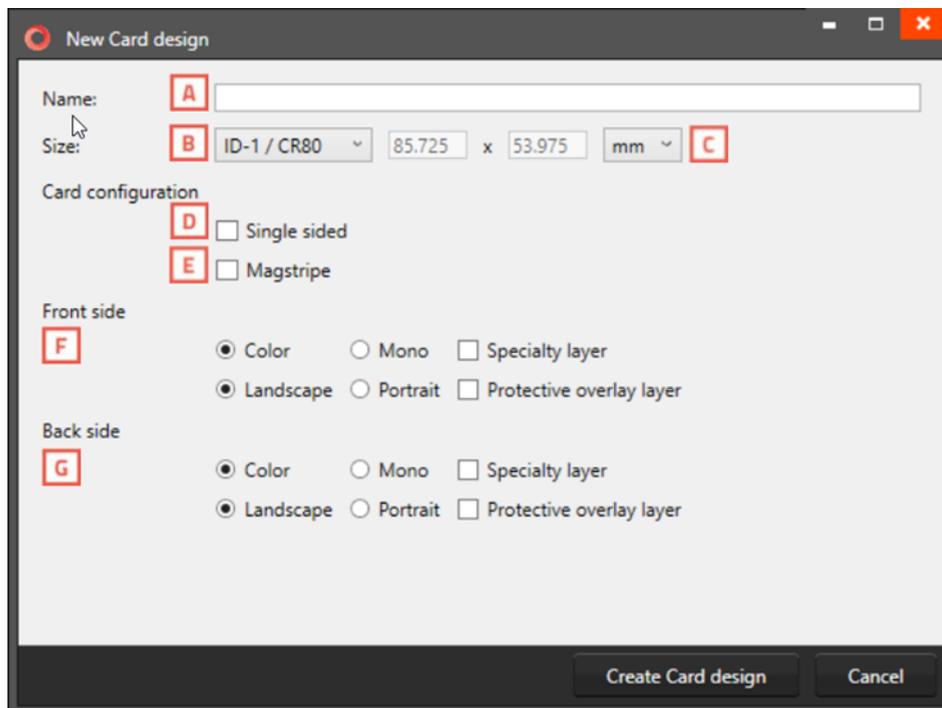


Fig. Example of new card design setup window.

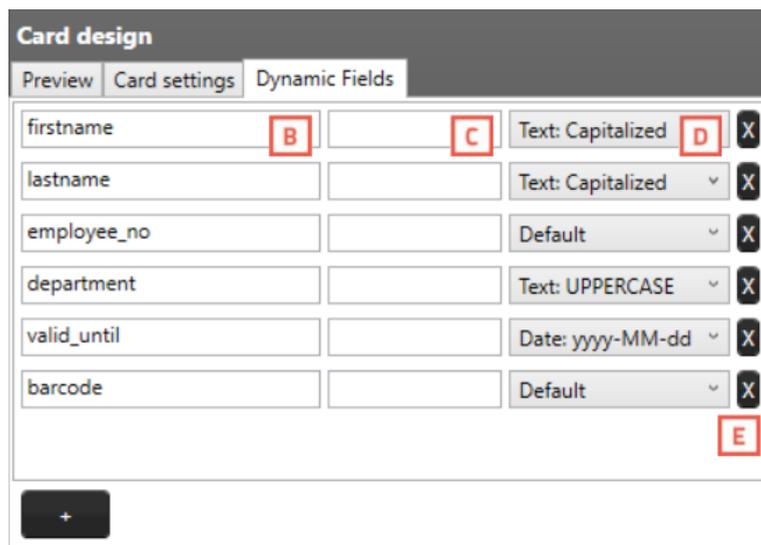
- A. Enter the name for the layout. The exclamation mark at the end appears when the field is not filled or the name already exists. The ‘OK’ button is not accessible until a unique name is given.
- B. The size of the card can be chosen from a drop-down list.
- C. Define a custom size for your layout.
- D. Check this box if the design is single sided.
- E. If you want MAGstripe in your design check this box.
- F. Check the ribbon type (color or mono) and the orientation of the design for the front.
- G. Check the ribbon type (color or mono) and the orientation of the design for the back.

Create Dynamic Fields

With the start of a new card design it is important to create the needed dynamic fields for a card design. For example: First name, Last name or Department.

The tab 'Dynamic Fields' in the card design view will give the user a list of the dynamic fields in the layout. When a text element is created, and the text string has a name in between curly brackets, BadgeMaker Design will detect this as a dynamic field name and will be added to the list of Dynamic fields.

The user can delete, change and edit the field names and also enter values to be used in preview.



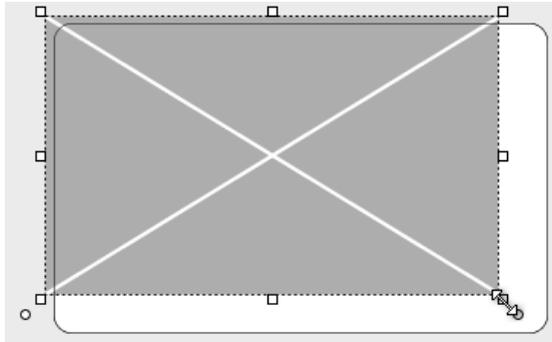
- A. Add a new dynamic field to the list by clicking on the “+” button.
- B. Here, you can enter the dynamic field name by clicking on it and rename it from, for example, “Dynamic Field 1” to “first_name”.
- C. It is possible to enter a default value for the fields. For example, the default value for “department” could be “Sales”.
- D. A dynamic field can have a certain format, the drop-down menu offers a couple of options. For example, the value of a certain dynamic text field needs to be “CAPITALIZED”.
- E. Click on the “x” button to delete a dynamic field.

Add a background

Setting up a card design starts with creating a background. Select the image element in the toolbar and click and drag the element over the front side of the card.



The image element is used to place an image element in the layout.



Keep the image element selected and go to element properties and click on the “Select Image” button.

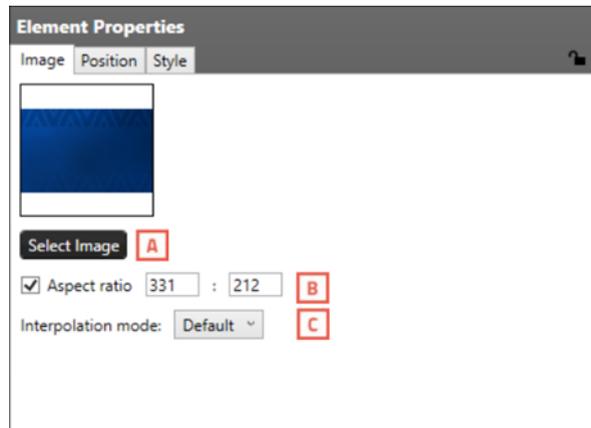


Fig. Image element properties

The front design now has a background image. Repeat for the back side of the card.

Use the image tool again to place a logo on your card design.

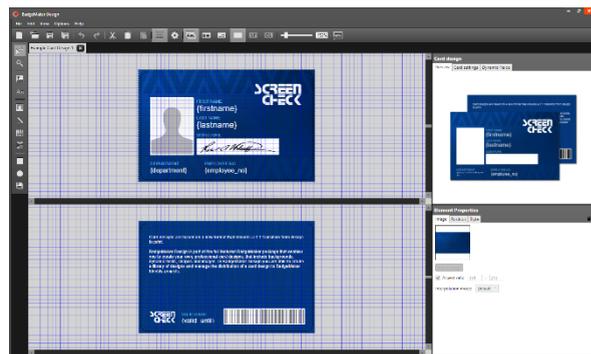


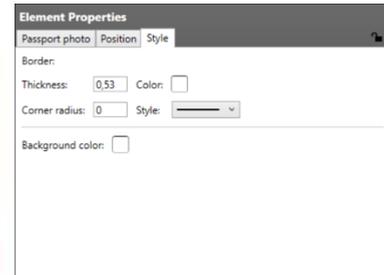
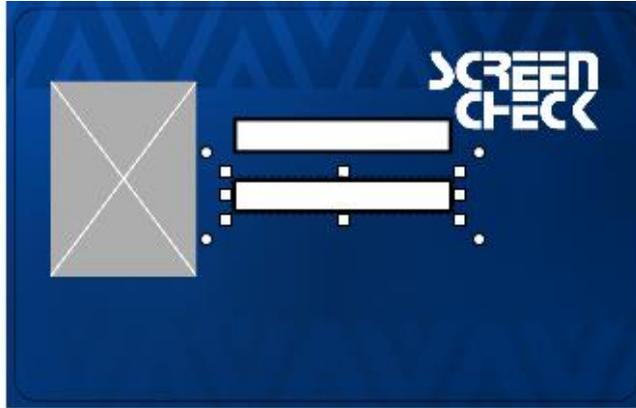
Fig. Badgemaker Card Design with background image on front side

Add shapes

Add a square shape as frame for the passport photo and two shapes as background boxes for the text.



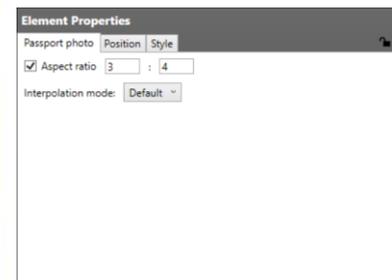
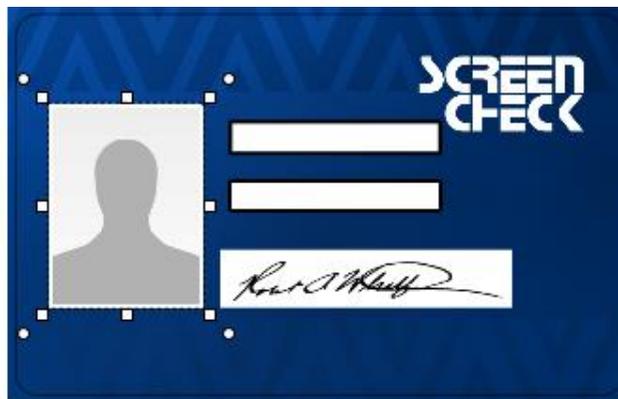
The rectangular element can be used for frames and boxes in the layout. Keep the shape selected and go to element properties to adjust style like color, border and transparency.



Add placeholder for passport photo and signature



The photo and signature element are used to place a placeholder for the passport photo on the layout. The element can scale within proportions. When the design is used and connected to data in for example BM Identity the placeholder will replace the dummy image with the real passport photo of that person.



Add barcode



The barcode element is used to place a placeholder for a barcode on the layout. You will be able to scale within proportions. When the design is used and connected to data in Identity the placeholder will replace the dummy image with the real barcode. There are different types of barcodes available to select in the element properties. Barcodes that are scaled too small might not work. Test your barcode in your design with the required data before continuing the production process.

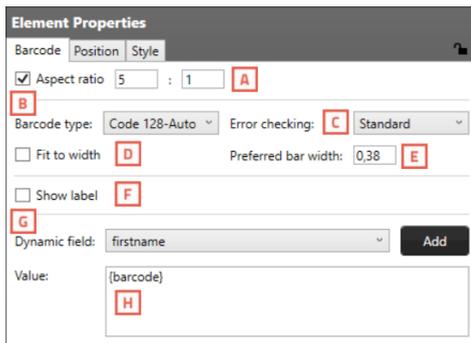
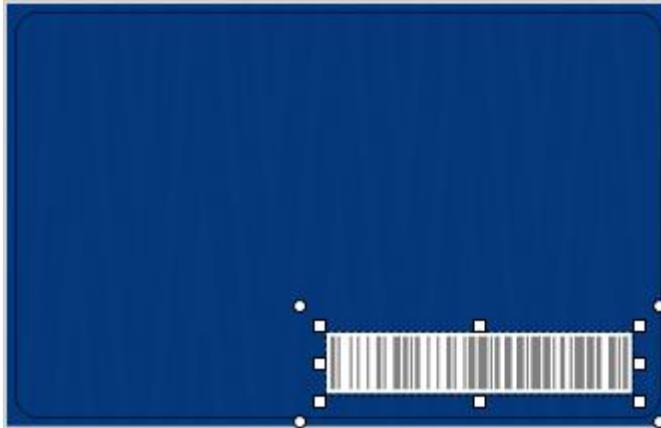


Fig. Example of the barcode setup in Element Properties.

- A. Check box to bind the element to a certain ratio
- B. Choose a barcode type by clicking on the drop-down box and selecting the required option available.
- C. Select a form of error checking from this list to ensure a correct working barcode.
- D. Fit the barcode to the width of the card.
- E. Enter a custom width for your barcode.
- F. If you want the barcode to show a label with the real data, check the show label check box.
- G. Select the dynamic field that you want the barcode to reflect, click the “Add” button to add the dynamic field to the value. You can also enter a value for the barcode.
- H. Enter a default value or combine it with a dynamic field.

Add Text

Add all the required text to the card. Add a new element for separate text elements so they can be placed where needed.



The text element can be used for static and dynamic text. Use the Text Element properties to edit and add text and/or dynamic text to the box. By clicking on the element and going to Element properties you will see the text editor.

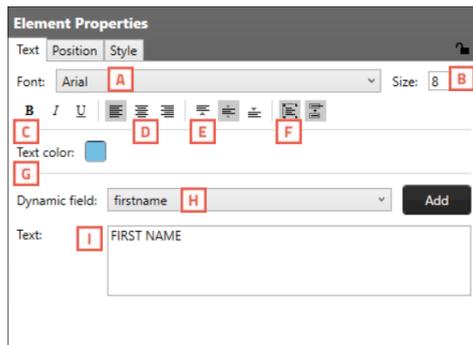


Fig. Example of the text element properties

- A. Change font
- B. Change size
- C. Edit style into **bold**, *italic* and underlined.
- D. Outline the text left, center or right
- E. Align the text to top, center or bottom of the box.
- F. Wrap text automatically or let text be cut off when being too long.
- G. Give the text color by clicking on the color box.
- H. Choose to add a dynamic field to the text box below by selecting one out of the drop-down menu and clicking on the “Add” button.
- I. Enter all your text here.

Add Dynamic Logo

Add a dynamic logo element as a placeholder for images that need to be different depending on certain cardholder information. In this design we want different country flags depending on where a cardholder comes from.



The Dynamic logo element is used to place a placeholder for a dynamic logo on the layout. When the card design is used and connected to data in BadgeMaker Identity the placeholder will replace the dummy image with one of the dynamic logos.

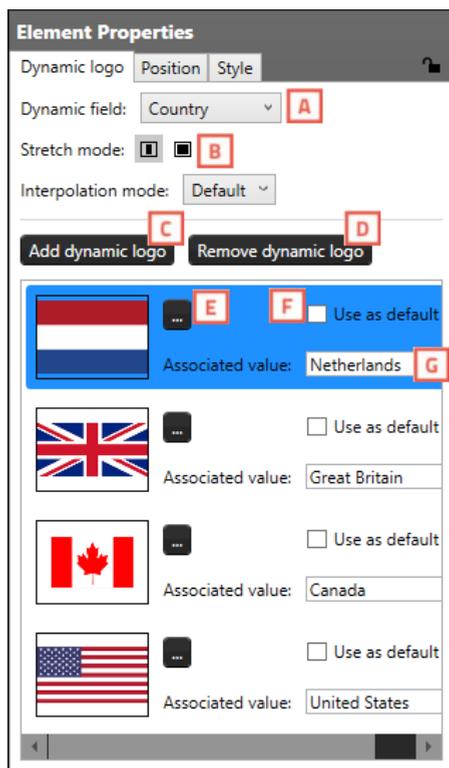


Fig. Example of the dynamic logo setup element properties.

- A. Select the dynamic field that needs to reflect the dynamic logo.
- B. Select if you want the logo to be the correct ratio or if you want it to fill the whole field.
- C. Click on this button to add another dynamic logo.
- D. When you want to delete a dynamic logo select the logo you want to delete first and then click on the “Remove dynamic logo” button.
- E. Select an image for your dynamic logo by clicking on this button.
- F. Check the default box if you want this image to show up as the default dynamic logo image.
- G. If you want to add a value to your dynamic logo enter the data into this field.

Save Card Design

After finishing the card design, make sure to save it. A BadgeMaker Identity project can now be created and connected to the created card design.

Step 4. Start a new Project

Interface

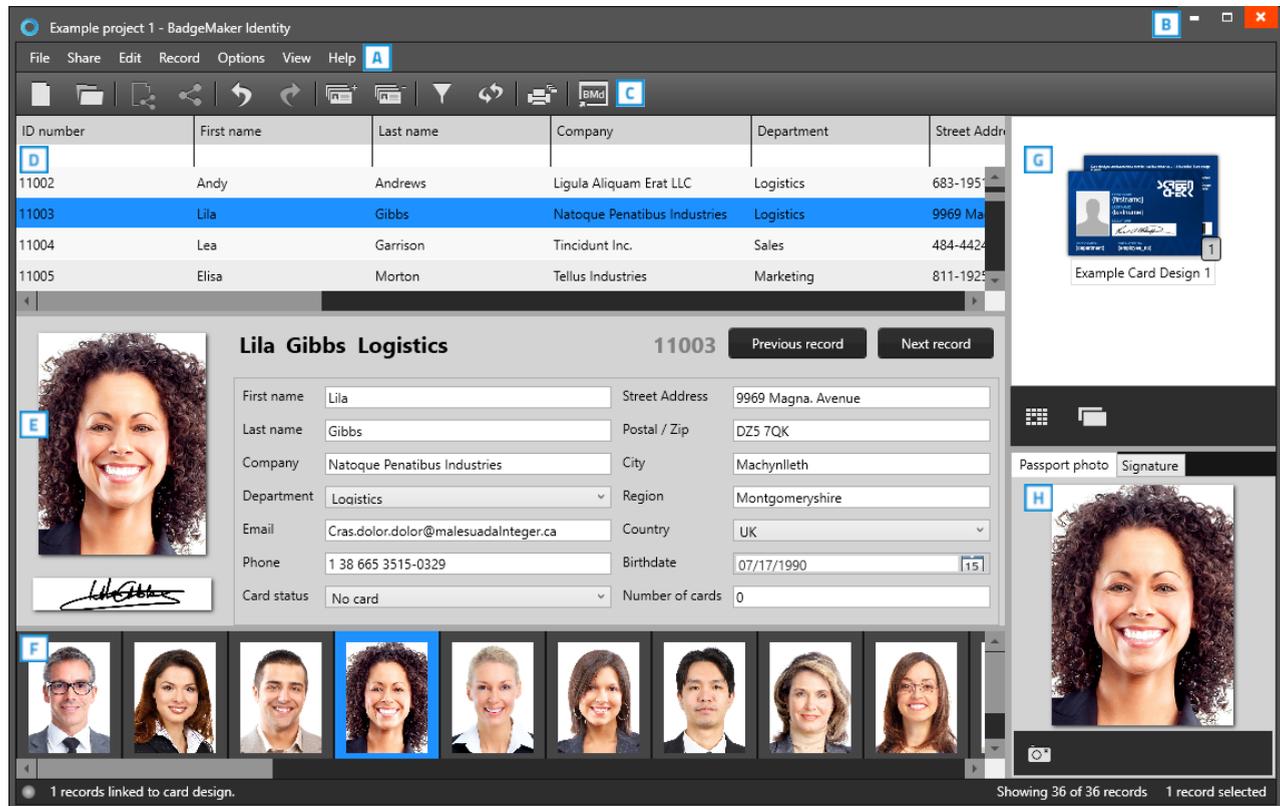


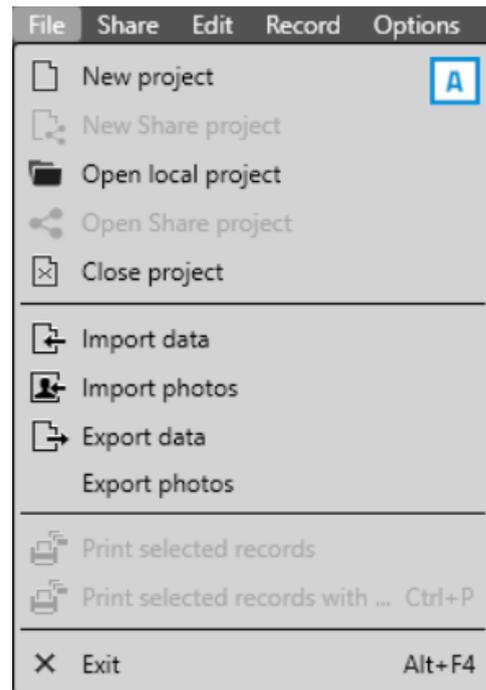
Fig. Example of the BadgeMaker Identity dashboard overview

- A. Main menu
- B. Window menu
- C. Quick menu
- D. Grid view
- E. Detail view
- F. Photo slider view
- G. Layout gallery and layout preview
- H. Photo and signature preview

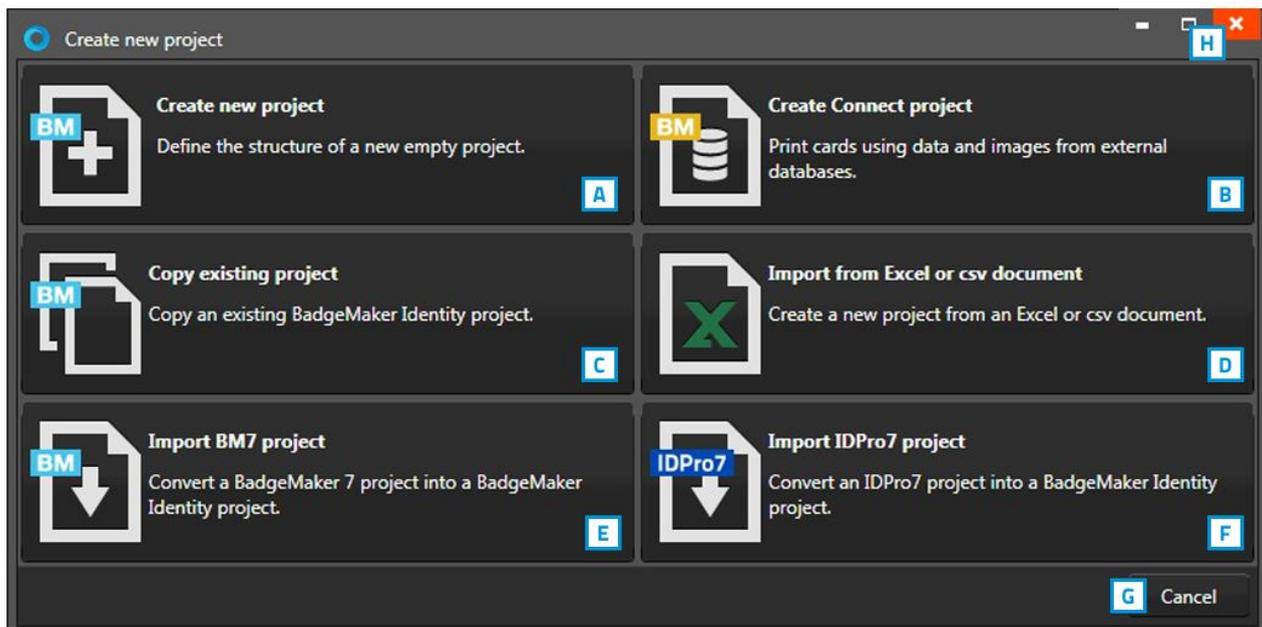
New Project

A. Go to File in the main menu and click on “New”.

Or click on the icon below in the quick menu:



When clicking on the “New project” link or button a “Create New Project” window will pop-up. You can select one of the six options to start a new project. This Quick Start Manual will show you how to set up a complete new project. Click on “Create a New Project”.



Create a New Project

Click on Create a New Project if you want to start with a blank data grid and setup your own field names.

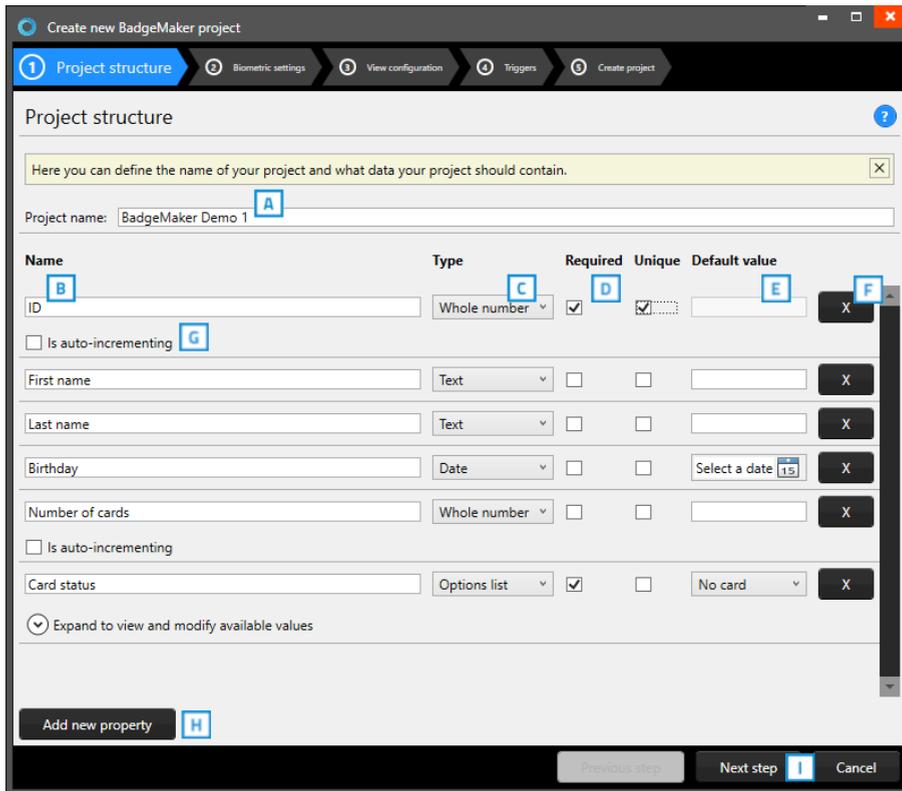


Fig. Example of step 1. New project: add Project Data columns

1. Project Structure

Step 1. is to setup the project structure by adding the project data fields.

1. Enter the name for your new project.
2. Check these boxes when the project needs signatures and/or photos.
3. Enter the data field name.
4. Set the data type. Select if the data are number or text for example.
5. Check these boxes if the field needs to be “Required” and/or “Unique”.
6. With the default input field you can add a standard value to your data field, existing empty fields and new records will automatically get the default value you add to this data field.
7. Click on the “X” button to delete a data field from the project structure setup.
8. Enable auto-increment.
9. Click on the “Add new property” button and add and describe the data field names you want to use in your new project.
10. Click on the “Next step” button to go to step 2 and configure the detailed and gallery view.

2. View configuration

During step 2 you can select the default configuration or adjust the setup for Detailed and Gallery view.

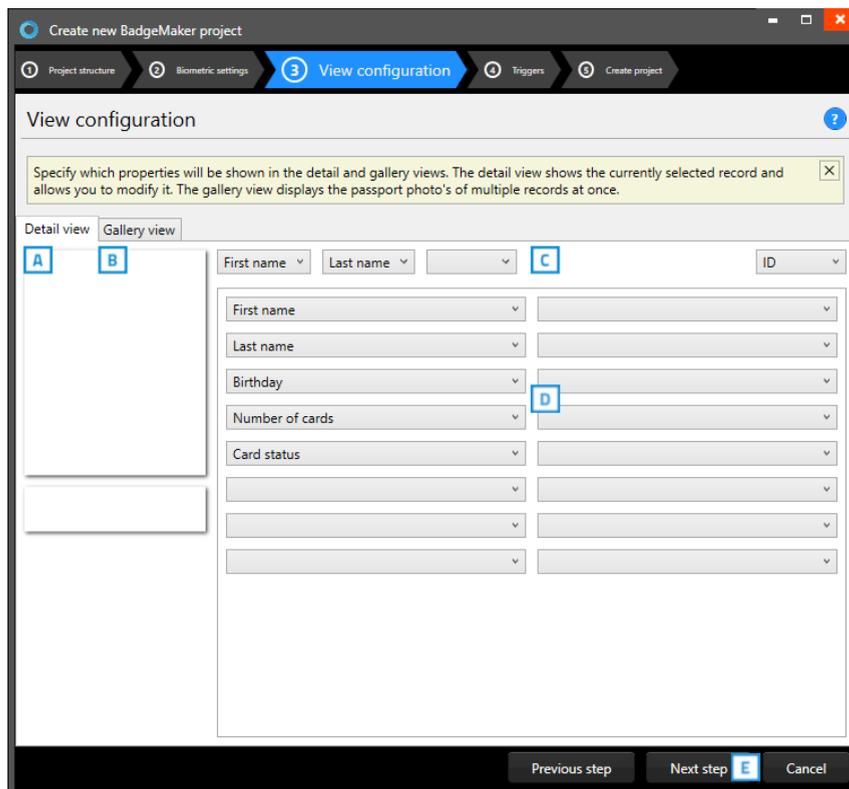


Fig. Example of step 2. New project: view configuration

- A. Tab to configure Detailed view showing specific cardholders' information.
- B. Tab to configure Gallery view showing cardholders' photos.
- C. Setup the title for the detailed view.
- D. Setup the information that will be shown in the detailed view.
- E. Click on the "Next step" button to go to step 3 and add biometric settings to the project.

3. Biometric settings

During step 2 you can select the default configuration or adjust the setup for Detailed and Gallery view.

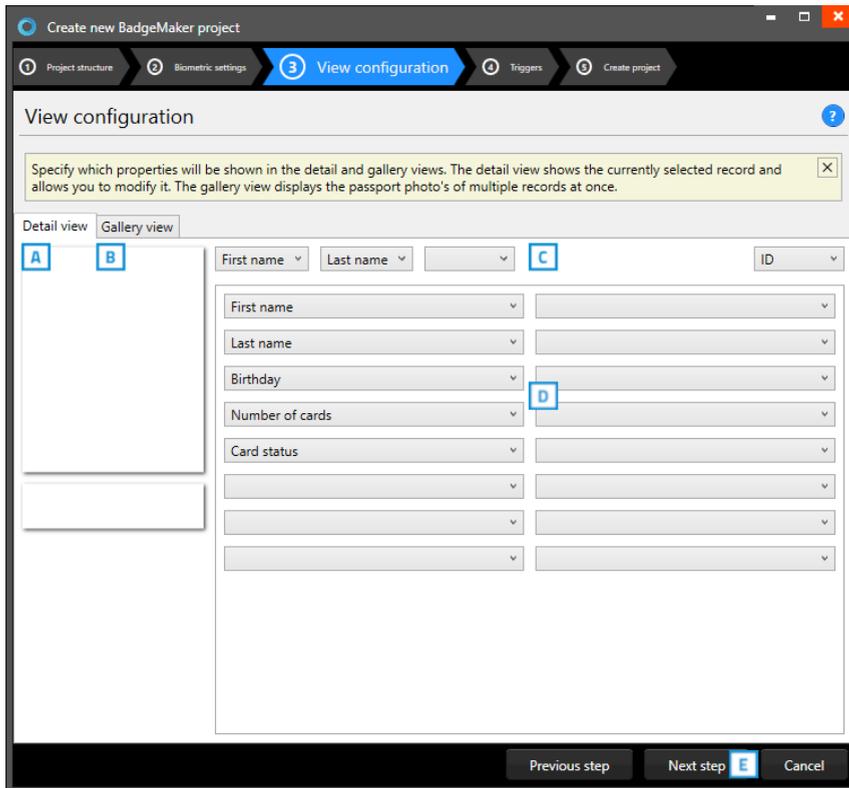


Fig. Example of step 3. New project: Biometric settings

- A. Tab to configure Detailed view showing specific cardholders' information.
- B. Tab to configure Gallery view showing cardholders' photos.
- C. Setup the title for the detailed view.
- D. Setup the information that will be shown in the detailed view.
- E. Click on the "Next step" button to go to step 4 and add triggers to the project.

4. Triggers

Step 3 allows you to setup trigger for your project. Triggers can be used to automatically change data in your project on a certain condition or event.

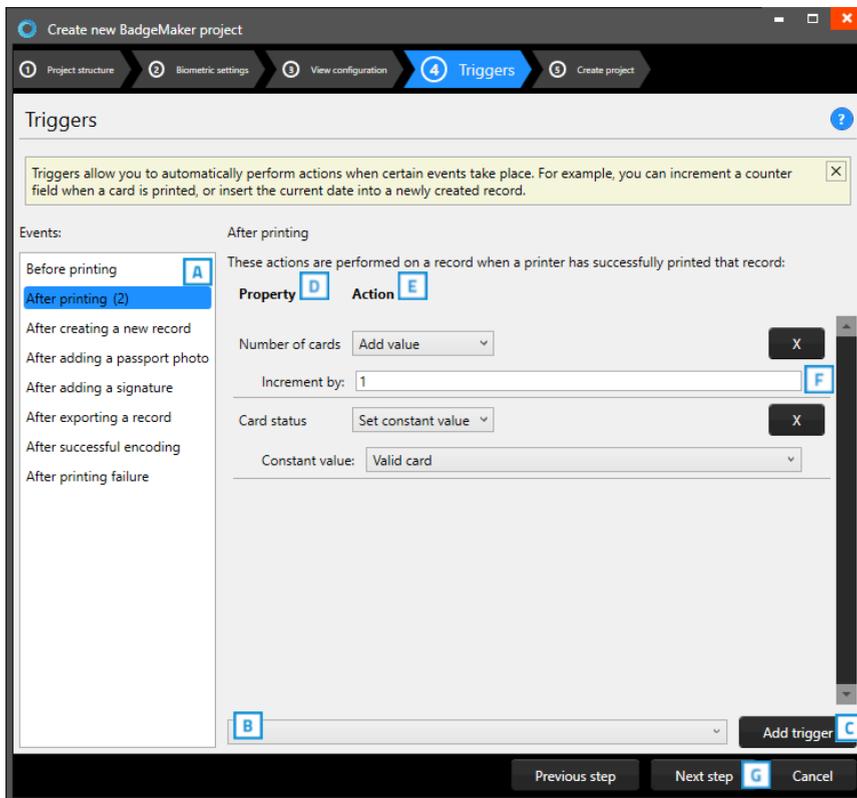


Fig. Example of step 4. New project: Triggers

- A. Select one of the events from this list and add specific triggers. BadgeMaker Identity will automatically wait for the event to occur before performing the action that is linked to the trigger.
- B. All data columns of the new project are listed. Select one of the columns in order to link a trigger action to it.
- C. Click on the “Add trigger” button to add the trigger to the data column and specify the trigger with events and actions.
- D. The property shows you the selected data column.
- E. Select the action you want to connect to the data column from the drop-down menu and define the action.
- F. Click on the “X” button to delete a trigger from an event.
- G. Click on the “Next step” button to go to step 5 and create the project.

Define the action that is performed once the event has been met. Some actions are only available for specific columns (for example, incrementing number values can only be done on Number type columns). All changes need to be saved before they become active. Understand that triggers might cause your original data to change, so make sure no vital data is lost when working with triggers.

4. Create project

During step 4 the application will start creating your new project after you click on the A. “Create project” button. If there are problems read the feedback provided and click on the B. “Previous” button to go back and make the needed adjustments.

You are now ready to start adding records to your data grid.

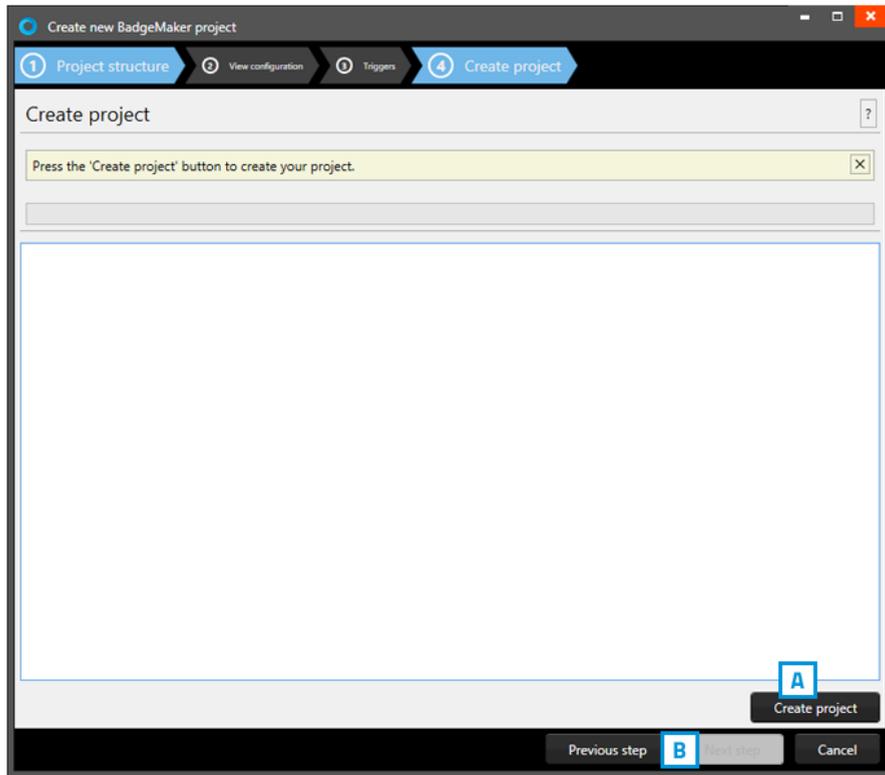


Fig. Example of step 5. New project: Create project.

Add Data

Records are single data rows that contain all the information of one person. There is a button for adding and deleting a record. Next to adding records one by one you can also choose to import data using an excel file.

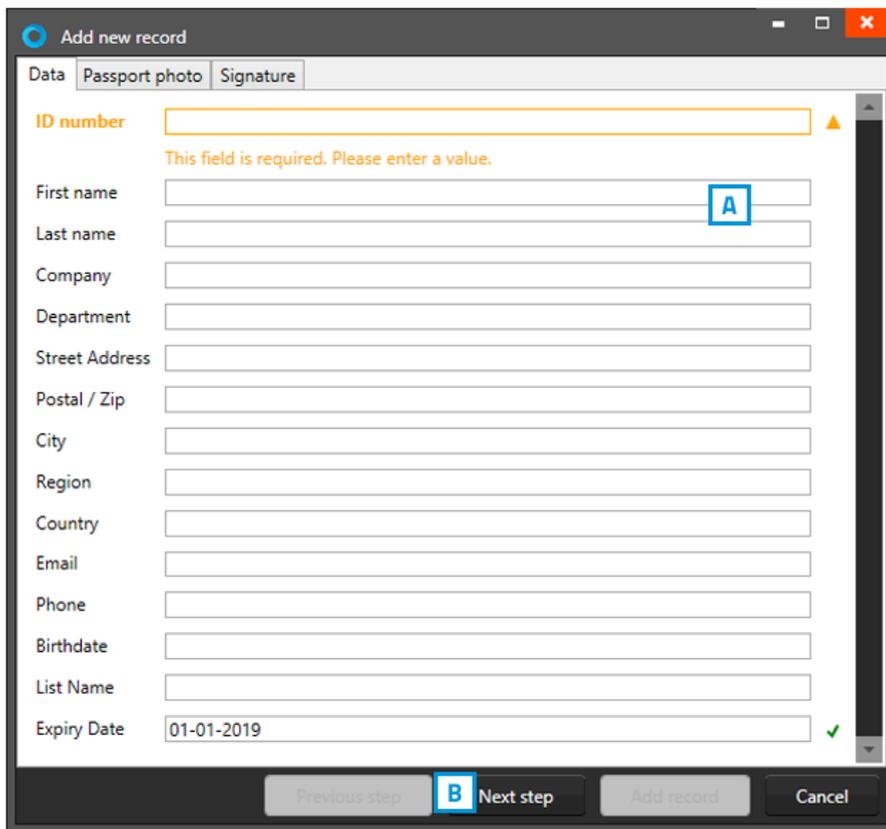
Add a new record



If you add a record a new pop-up window will appear to enter the new record. The entry form allows the user to enter the data and capture a photo and/or signature.

1. Information

- A. Enter the required information for each field and click on the
- B. “Next step” button.



The screenshot shows a pop-up window titled "Add new record" with three tabs: "Data", "Passport photo", and "Signature". The "Data" tab is active and contains the following fields:

- ID number**: A text input field with a red error message below it: "This field is required. Please enter a value." A red triangle icon is to the right of the field.
- First name**: A text input field with a blue box labeled "A" to its right.
- Last name**: A text input field.
- Company**: A text input field.
- Department**: A text input field.
- Street Address**: A text input field.
- Postal / Zip**: A text input field.
- City**: A text input field.
- Region**: A text input field.
- Country**: A text input field.
- Email**: A text input field.
- Phone**: A text input field.
- Birthdate**: A text input field.
- List Name**: A text input field.
- Expiry Date**: A text input field containing "01-01-2019" and a green checkmark to its right.

At the bottom of the window, there are four buttons: "Previous step" (disabled), "Next step" (highlighted with a blue box and labeled "B"), "Add record" (disabled), and "Cancel" (disabled).

Fig. Example of the information tab when adding a new record.

2. Photo

A. Select the camera source you want to use from the drop-down menu. You can choose to use your web cam, or a TWAIN camera connected to your computer.

B. Click on the “Take Picture” button. The photo functionality will show you the camera view.

C. The application will detect your face automatically and take three pictures. You can select one of the three pictures to add to the new record.

D. Click on the “Start automatic capture” button. The Photo functionality will show you the camera view. You are also able to upload an image from your computer. Click on the “Open file...” button to select an image from a file.

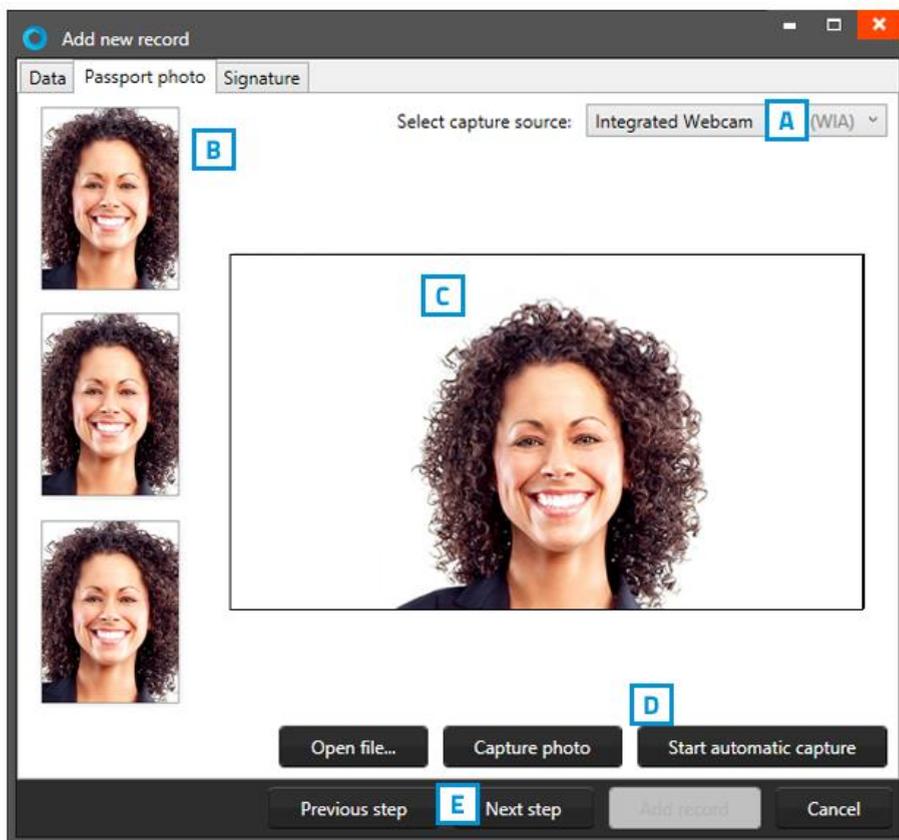


Fig. Example of the photo tab when adding a new record.

3. Signature

A. Use a signature pad to add a signature in this field.

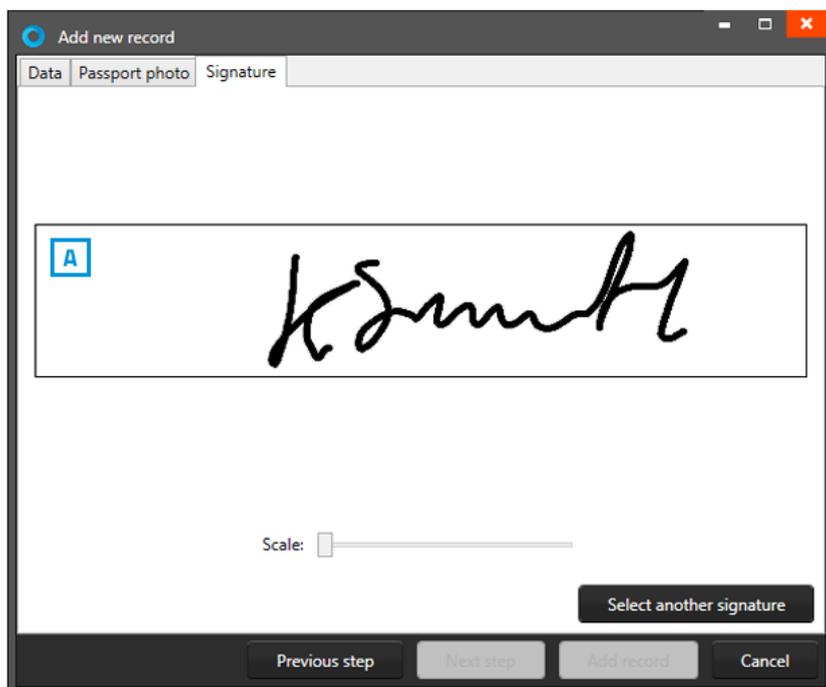


Fig. Example of the signature tab when adding a new record.

Import Excel or CSV data

You will be able to import data by using an Excel/CSV file, BadgeMaker 7 project or IDPro7 project. In this Quick Start Manual option **A** Excel is used as an example.

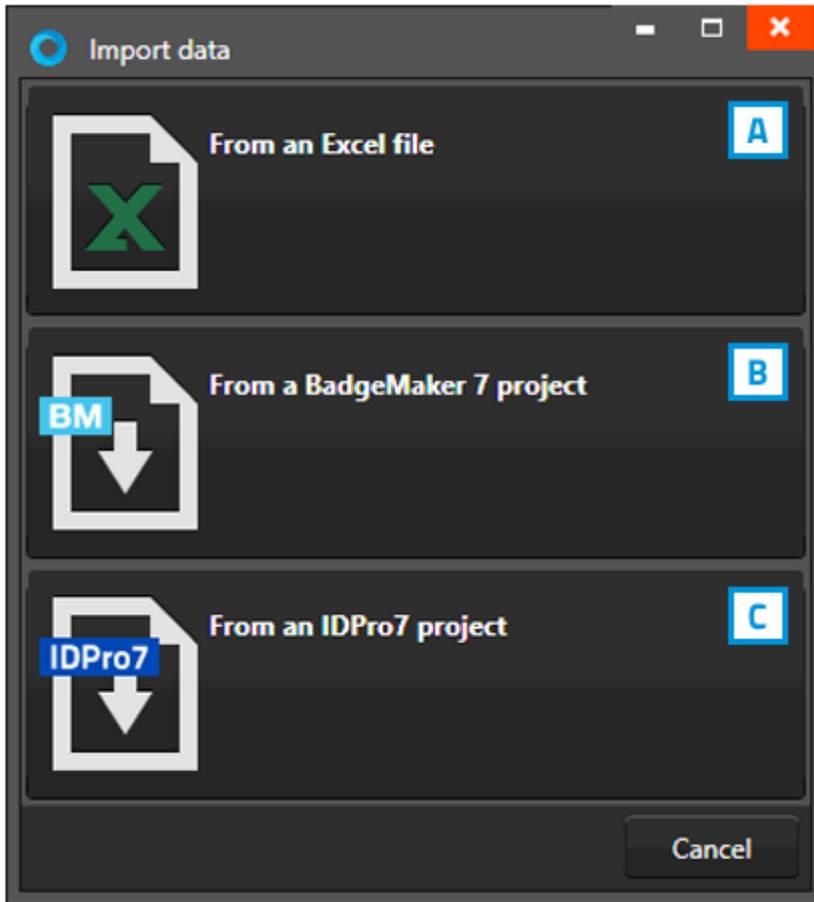


Fig. Example of the import data pop-up window.

1. Excel file

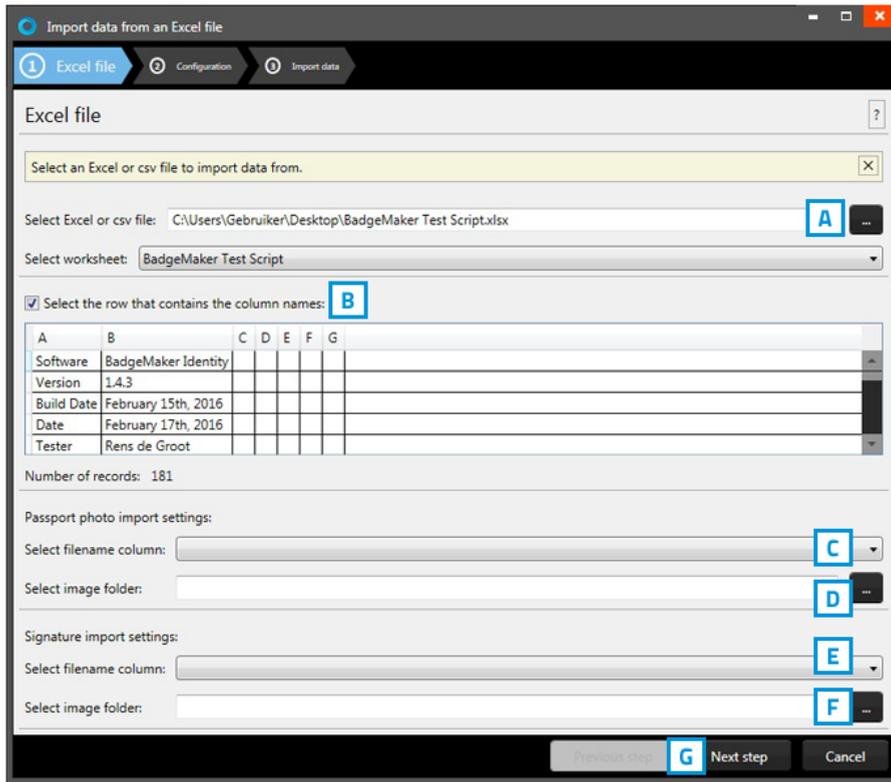


Fig. Example of the import data pop-up window.

- A. Click on this button and select the Excel/CSV file you want to import.
- B. Select the worksheet you want to use from the drop-down menu.
- C. Select the row that contains the column names.
- D. Select the column that connects with the unique photo names (for example: ID number or index).
- E. Select the folder that contains the cardholders' photos.
- F. Select the column that connects with the unique photo names (for example: ID number or index).
- G. Select the folder that contains the cardholders' photos.
- H. Click on the "Next step" button to continue to second step.

2. Configuration

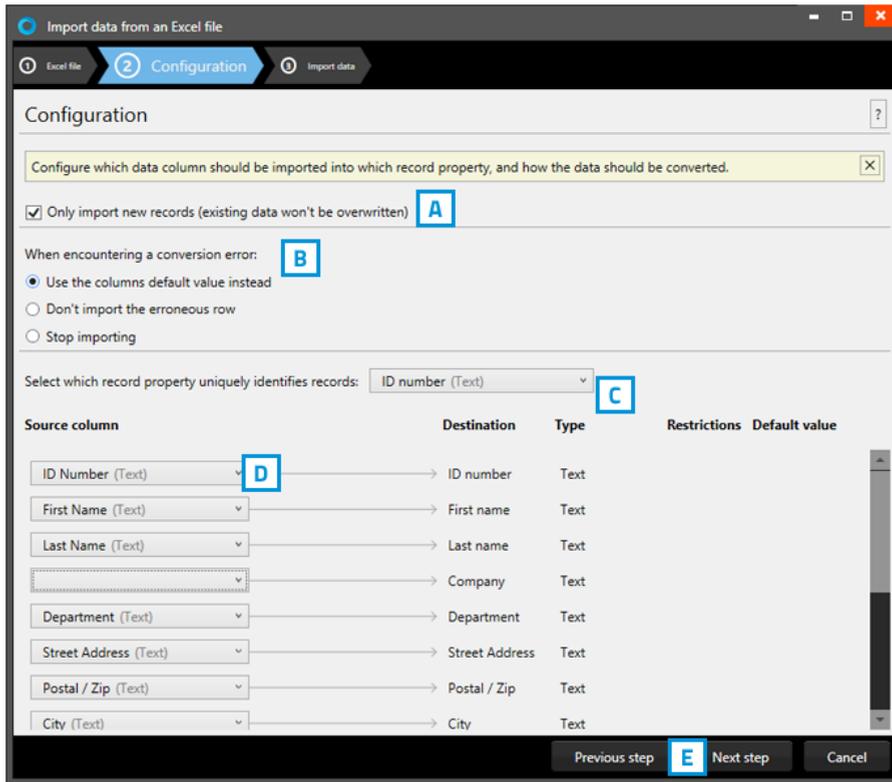


Fig. Example of the import Excel/CSV data pop-up window.

- A. Check this box to only import new records, existing records will not be overwritten.
- B. Select what happens when encountering a conversion error.
- C. Select one of the fields of the excel data which uniquely identifies data in the data source.
- D. Connect the source columns with the destination columns, BadgeMaker has already connects the columns with similar names.
- E. Click on the “Next step” button to continue to import the data.

3. Import data

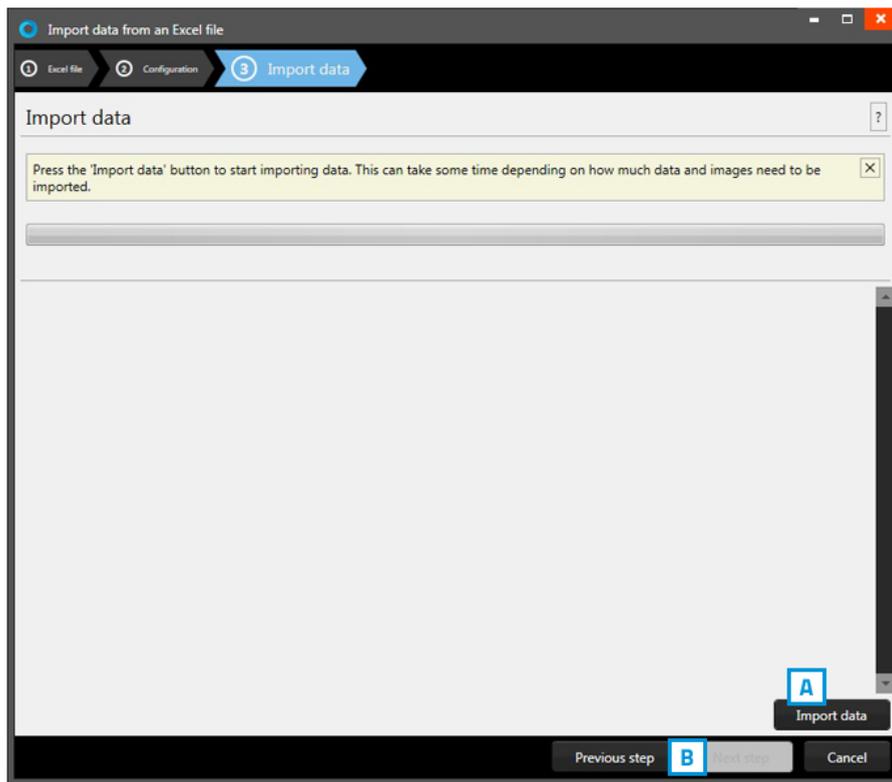


Fig. Example of step 3. Import data

Step 3 is processing the import of the data.

A. Click on the “**Import data**” button to start working with the imported data from your Excel file.

B. Click on the “**Previous step**” button to make any changes before creating the project.

Import Photos and Signatures

From the main File menu, select import photos, you can import passport photos and/or signature images here.

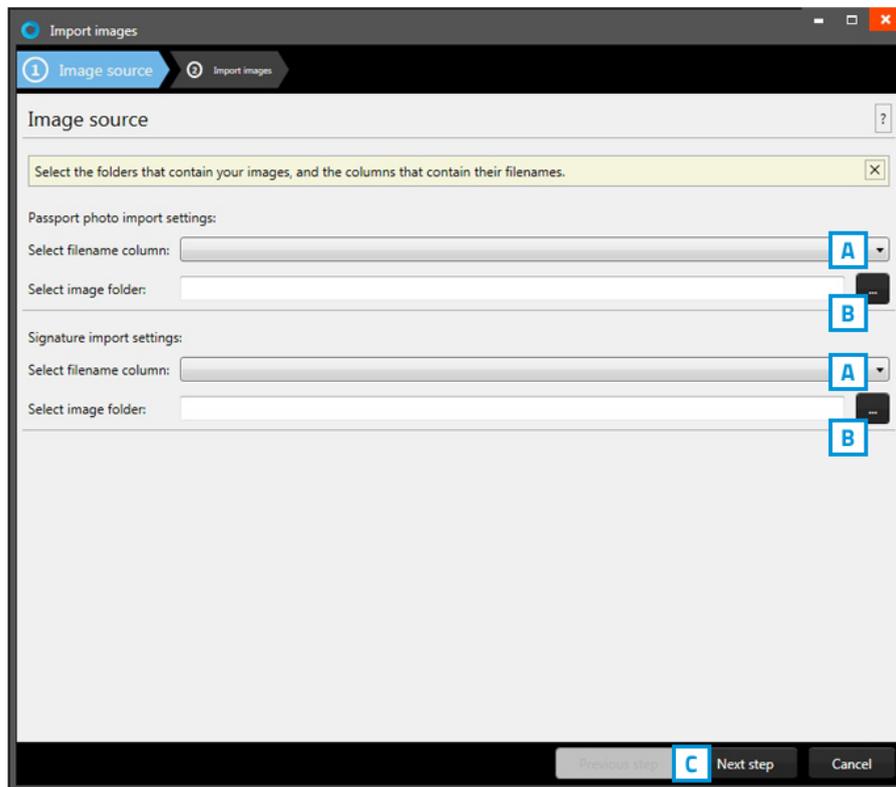


Fig. Example of importing biometric data.

- A. Select the data field that contains the unique data similar to the photos and/or signature names.
- B. Click on this button and select the photos and/or signatures folder you want to import from. The images need to have a unique name that can be connected to one of the unique fields.
- C. Click on the “Next step” button to continue to import the photos and/or signatures.

Step 5. Connect your card design to your project

Add Card Designs to a new Project

To connect your Badgemaker Design card to your project, go to the main menu, click on “Edit” and then “Project Settings”. The third tab is for adding and managing card designs to your project.

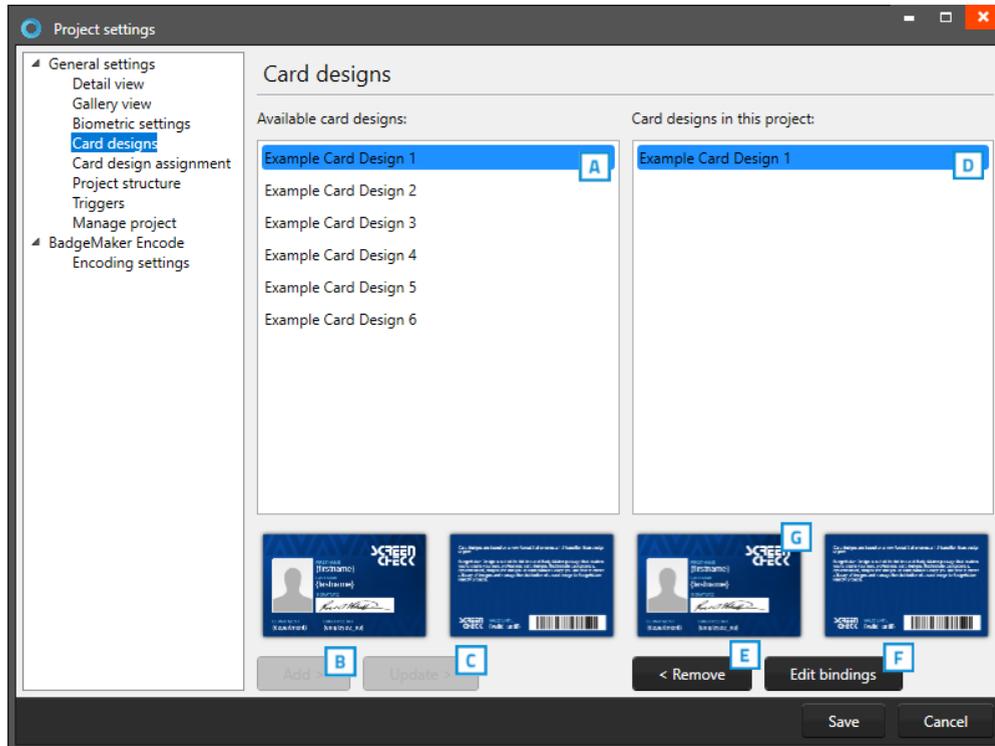


Fig. Example of the Project settings: Card Designs

- A. Select one of the available designs.
- B. Click on the “Add” button to add the design to your project.
- C. If you already have a certain design, you can choose to update it by clicking on this button. Any change made to the design will be updated after clicking on this button.
- D. If you want to remove a design from your project, select one of the designs in this list.
- E. Click on the remove button if you want to delete one of the selected designs from your project.

- F. Select a design and then click on the “Edit” button if you want to edit the bindings for the dynamic data of the card design.



The data binding tool is a powerful option in BadgeMaker Identity. When you add a new layout or update a layout you will be prompted to create the data bindings. Dynamic fields used and created in your layout may differ from the naming or spelling of a name that exists in your Project database. Therefore, you will be allowed to create the data bindings. The dynamic fields that are created in the layout are presented to the left and you can bind these dynamic fields to the database fields. The tool will create the bindings for you that are obvious: if they are the same or as they were bonded at the previous update; of course, you will be able to modify the bindings and confirm these settings. The new or modified layout will be available in the dashboard of BadgeMaker Identity.

- G. Preview of a selected Card Design.

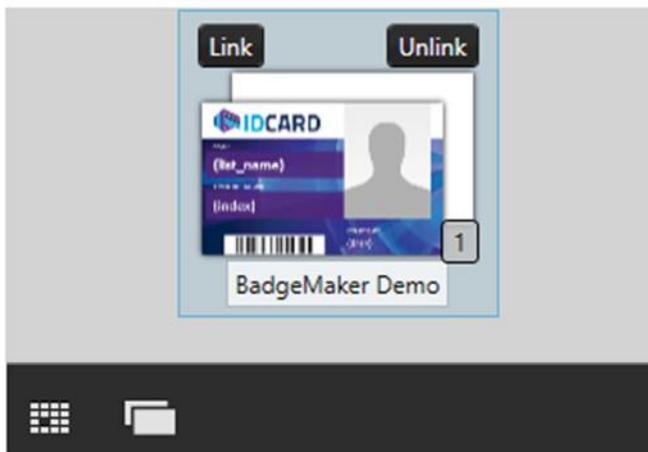


Connect a Design to a Record

The connection of a data record to a card design is needed when a card is going to be printed.

When a data record is selected click on the “Link” button of one of the card designs in the Card Designs Gallery view to connect the design to the record. To change the connection to a different lay-out, the user can click on the “Unlink” button and link another design. It is possible to select more data records at the same time and connect the selected records to a lay-out. Use CTRL+A, + CTRL or +SHIFT.

Use CTRL+A to select all records.



Step 6. Select records and print – screenshots update

Print records

To print a certain record, select it and then click on the print button in the quick menu or go to File and click on the print link.

1. A print window shows up so you can select the printer you installed for the card printing process. This manual does not describe the installation of printers. Please refer to the manufacturers manuals for further information on these devices. After you select the printer you click on the “Print” button.

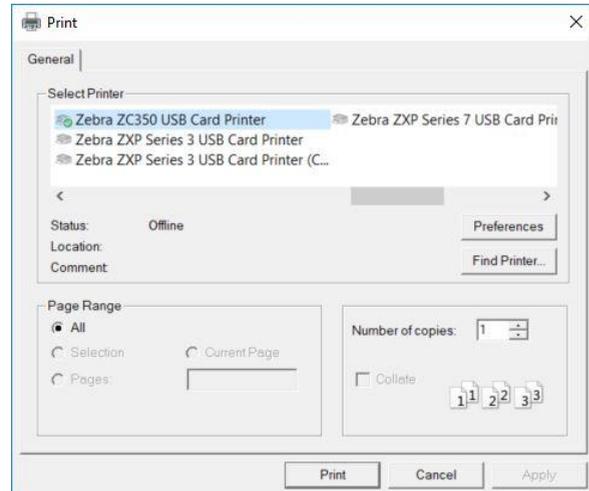


Fig. Example printer setup window.

2. A print progress window will pop up that will show you the progress of the cards that are being printed.

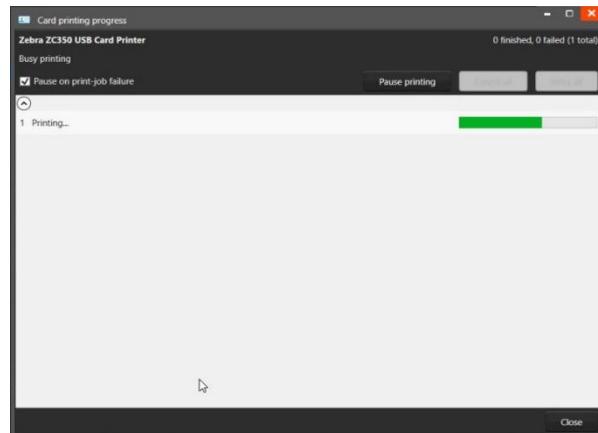


Fig. Example of the Card printing progress window.

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User Guide Log			
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V1.0	V1.0	29-1-15	-
V1.1	V1.1	6-1-15	Corrections
V2.0	V2.0.25	19-7-16	Update document to BadgeMaker 2.0
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