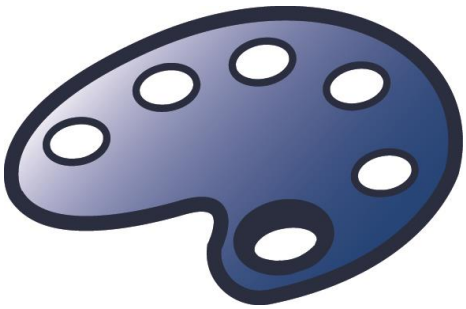


4.6.4 Studio

User’s Manual

www.badgepass.com

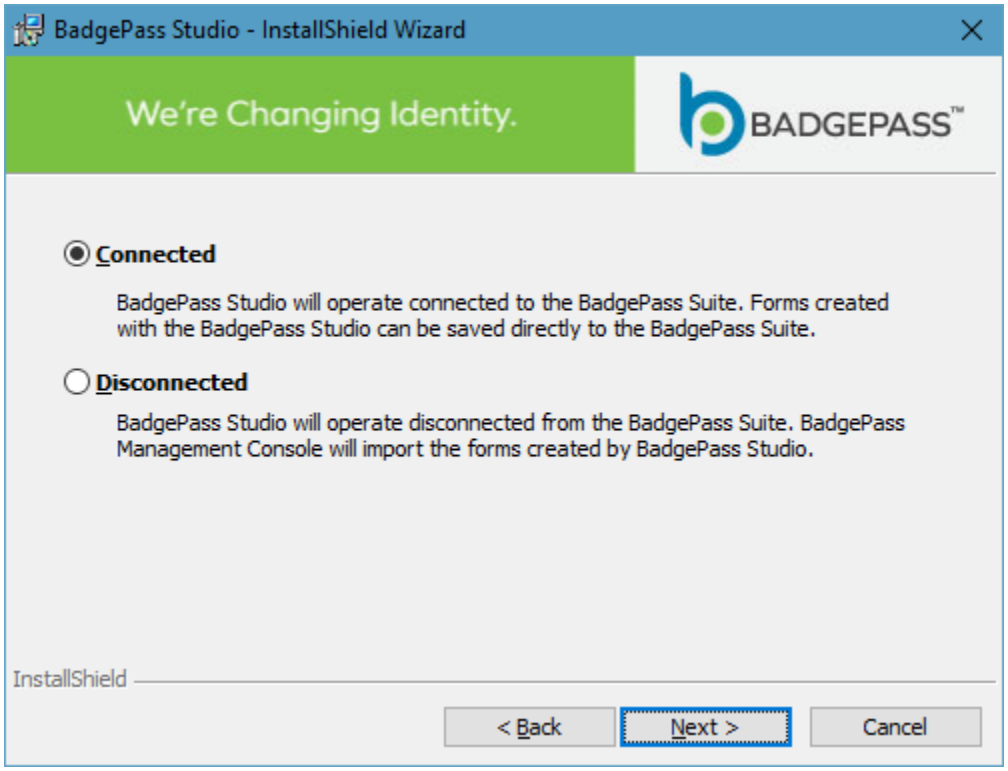
Table of Contents

1. Installation
    a. Connected
    b. Disconnected
2. File Tab
3. Home Tab
    a. Text Field
        i. Value Modifiers
            1. Insert
            2. Length
            3. Remove
            4. Remove
            5. Replace
            6. Substring
            7. Substring
            8. ToLower
            9. ToUpper
            10. Trim
        ii. Date / Time Format
        iii. Number Format
    b. Image
    c. Variable Image
    d. Line
    e. Rectangle
    f. Barcode
        i. Epic Barcode
    g. Magstripe
4. Format Tab
5. Setting Design Settings
6. Opening and Saving a Design
    a. Connected Mode
    b. Disconnected Mode
7. Appendices
    a. Appendix A: Exporting Database Fields in Management Console for use in BadgePass Studio

Installation

BadgePass Studio is where all badge designs are done for the BadgePass Identity Manager and Visitor Manager badges.

Run the installer and follow the prompts. *BadgePass Studio* can be loaded in either *Connected* or *Disconnected* mode. You will be prompted during the install process to choose which way you want to install it.



Connected

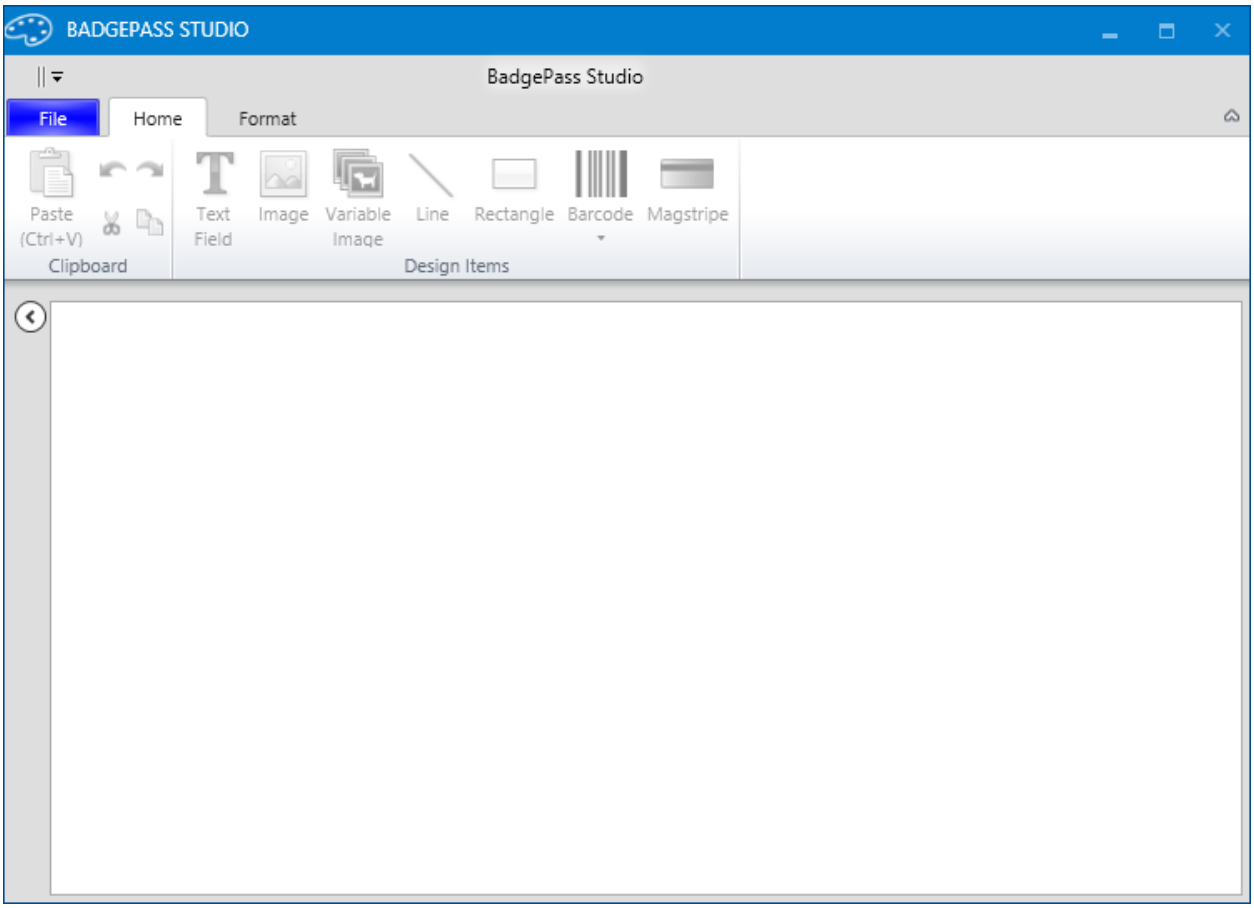
This option installs the *BadgePass Studio* whereby it is linked to the BadgePass database. All the badge designs are automatically saved to the BadgePass suite.

Disconnected

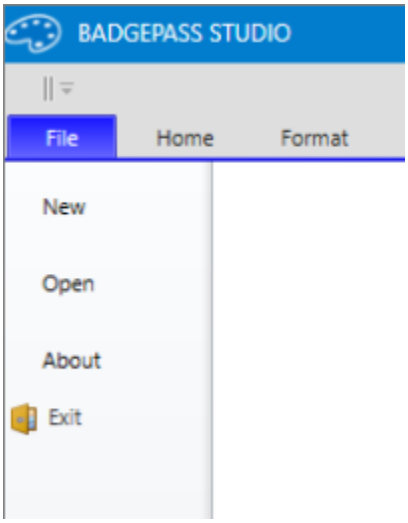
This option installs the *BadgePass Studio* whereby it will operate independent from the BadgePass database. You can design badges and then import them into the BadgePass suite via the *BadgePass Management Console*.

File Tab

After you install the BadgePass Studio and run the program you will get the following screen:

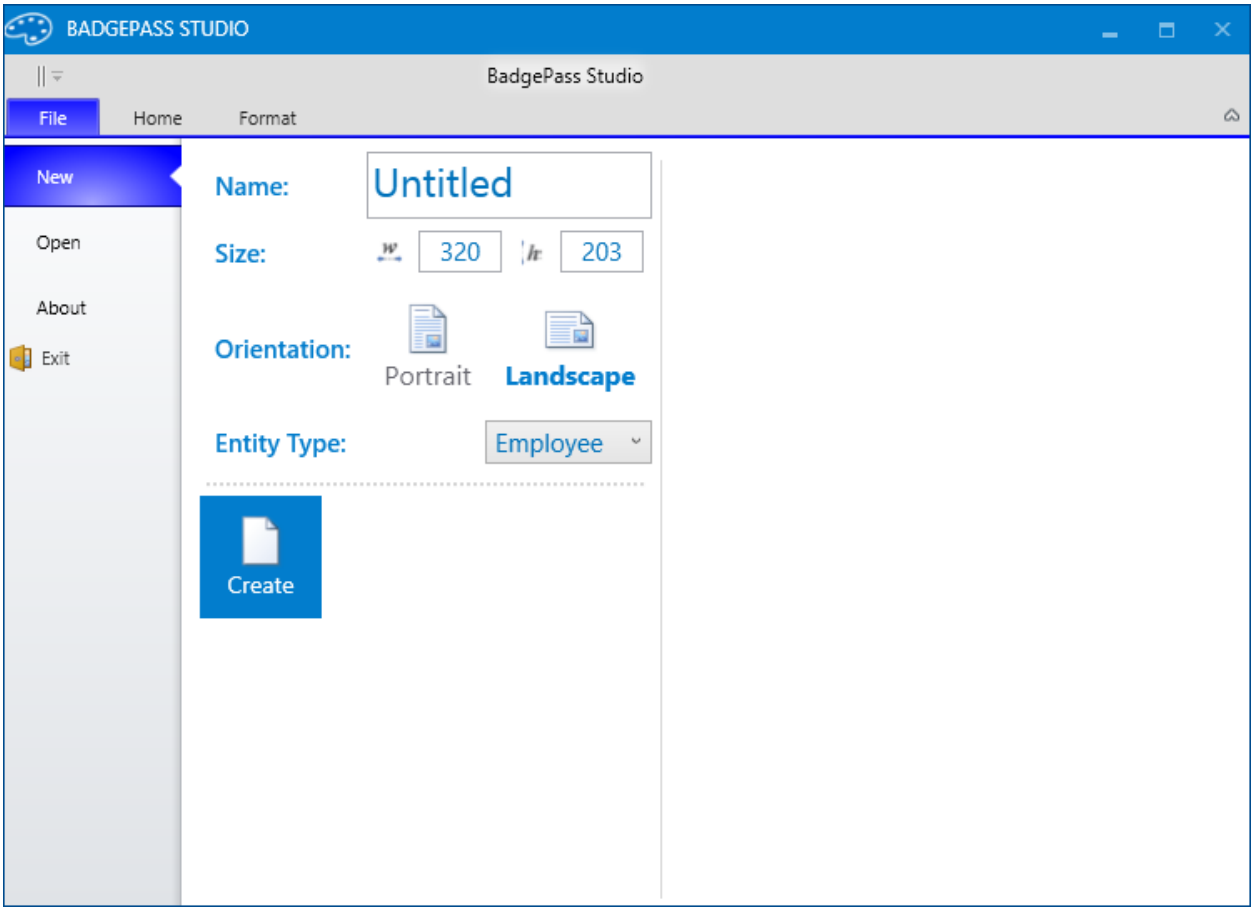


Click on the *File* tab and you will see the following menu items:



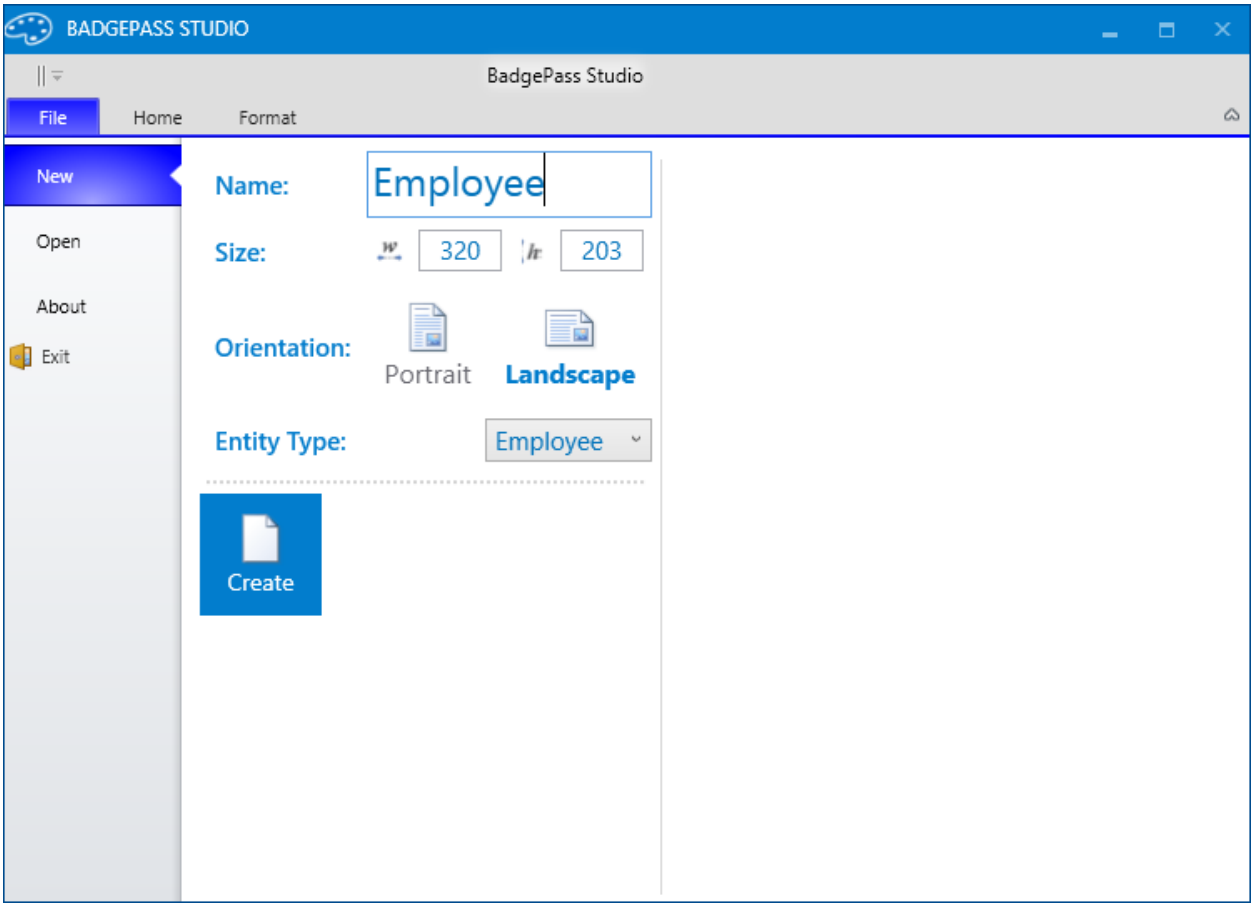
New Menu Item

Click the New menu item and you will see the following screen:

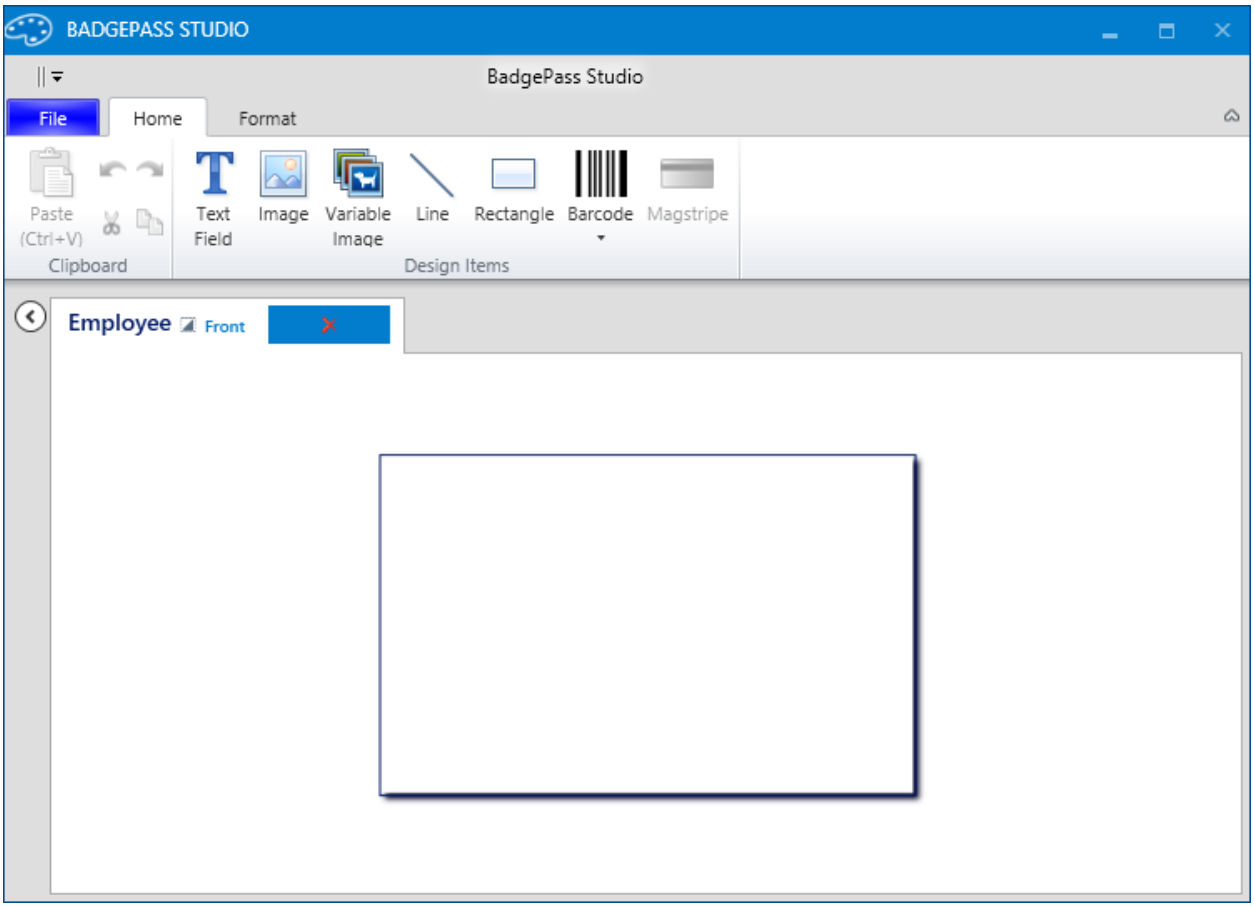


This is where you begin designing your new badge.

First you will need to name the badge design, to do so simply type the name you wish to use in the *Name* field. Set your badge *Size*, *Orientation* and select the *Entity Type*. The entity type is the entity within BadgePass (ex: Employee, Visitor, Person1, 2, 3).



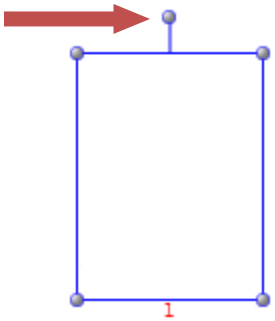
Then click the *Create* button.


BADGEPASS STUDIO
BadgePass Studio
File
Home
Format
Paste
(Ctrl+V)
Clipboard
Text
Field
Image
Variable
Image
Line
Rectangle
Barcode
Magstripe
Design Items
Employee
Front

Home Tab

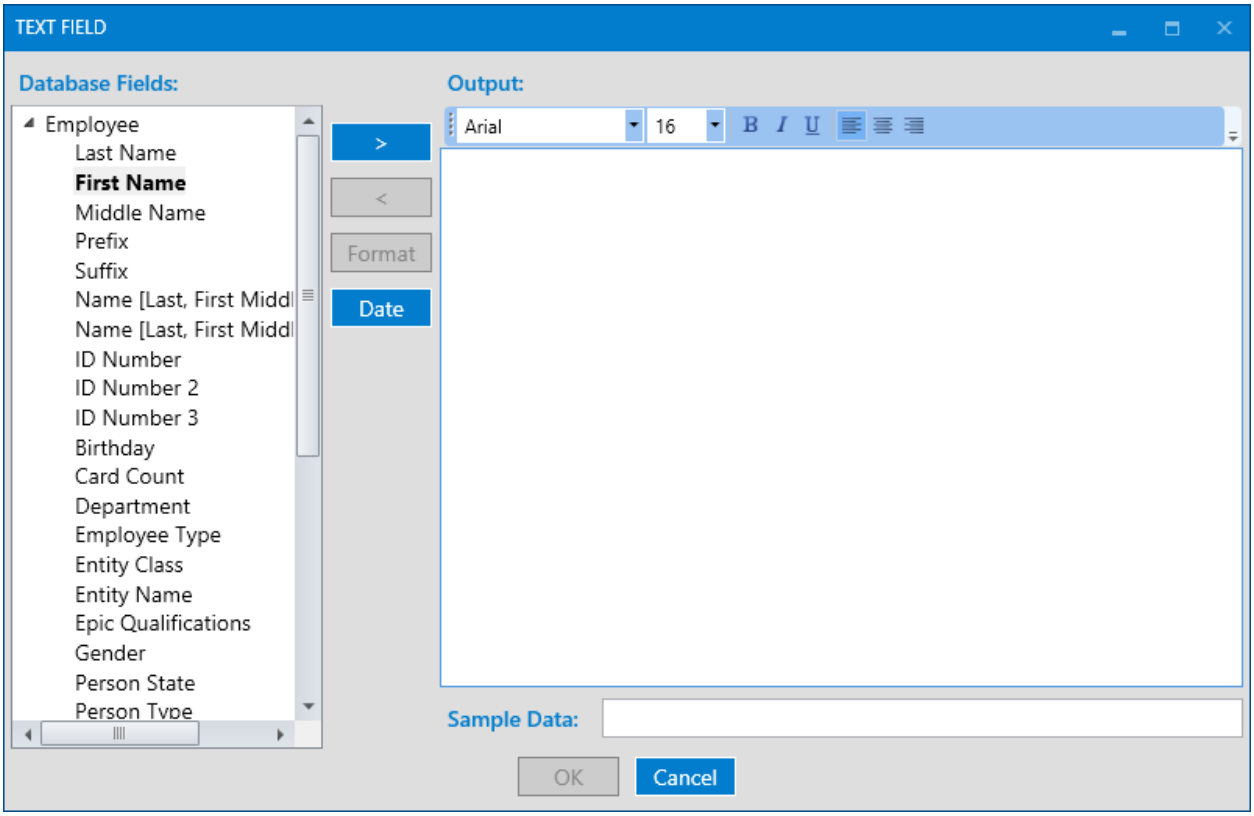
The *Home* tab is where you add fields to the badge design. The available fields are: *Text Field***,** *Image*, *Variable Image*, *Line*, *Rectangle*, *Barcode and Magstripe*. It should be noted that the *Magstripe* field will **only** be highlighted if you are working on the back of a card design. To see the back of the card click on *Front* in the design area tab. The value will change to *Back* showing that you are working with the backside of the card.

When you create fields on the card you will see a rotation handle on top of the field. This is used to rotate the field box. On each corner of the field box there are resize handles that can be used to change the size of the box. Also, there is a red number below the box - this is the *Z order* of the box on the template.



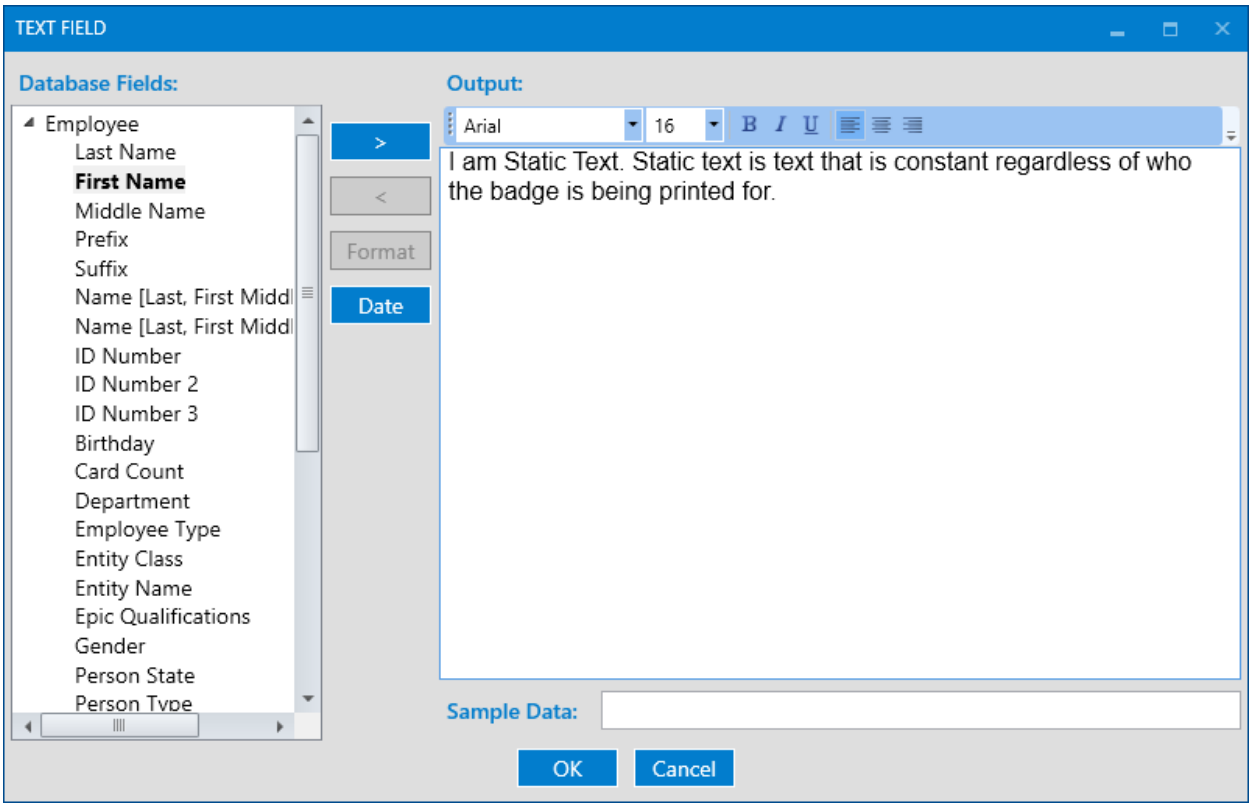
Text Field

To add a text field to the card design just single click on the *Text Field* icon. The following window will appear:

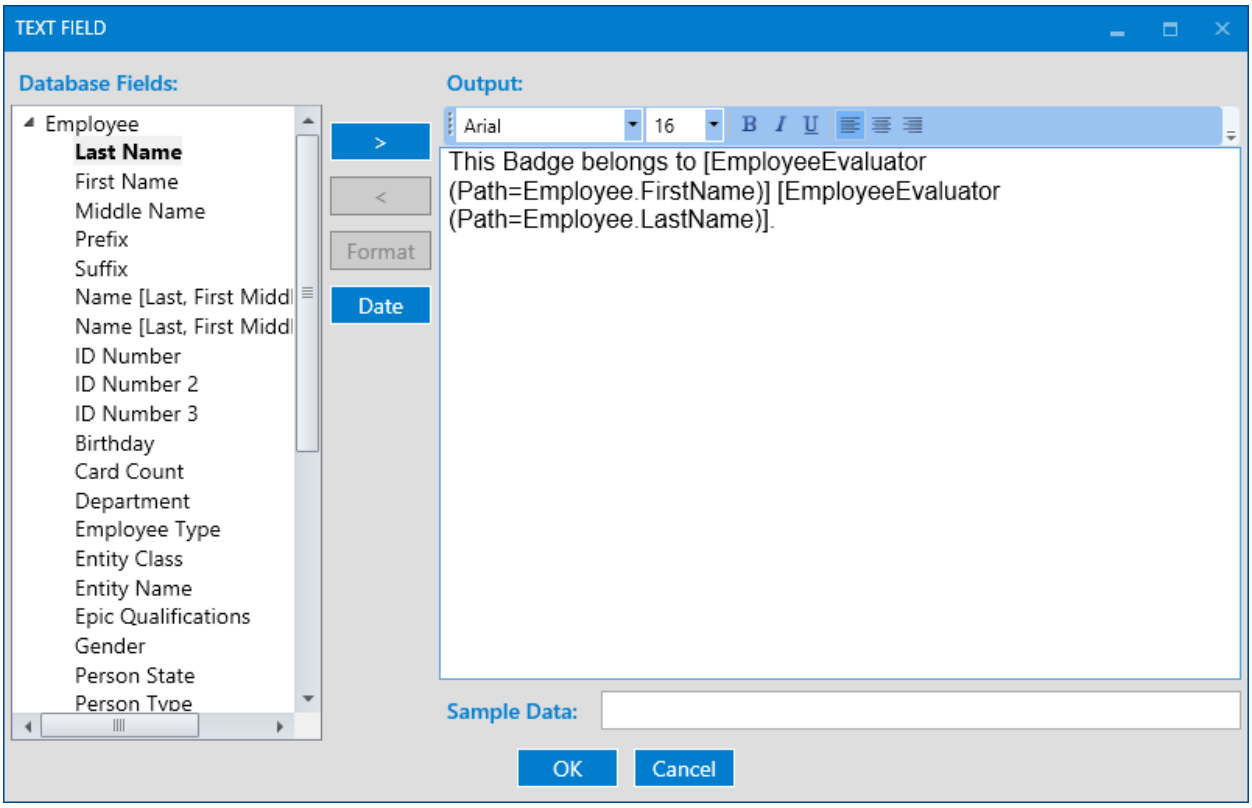


You can use variable text (data from a database field), static data or a combination of both types here. To add variable data just double click on the database field in the left column. When you add the field to the *Output* box the buttons in-between the two columns become highlighted. The arrows will add or takeaway fields from the output box. The *Format* button allows you to add formatting elements to the field in the output box and the *Date* button adds the system date to the field when the badge is being printed.

To add static values to the field simply type the value in the *Output* box.



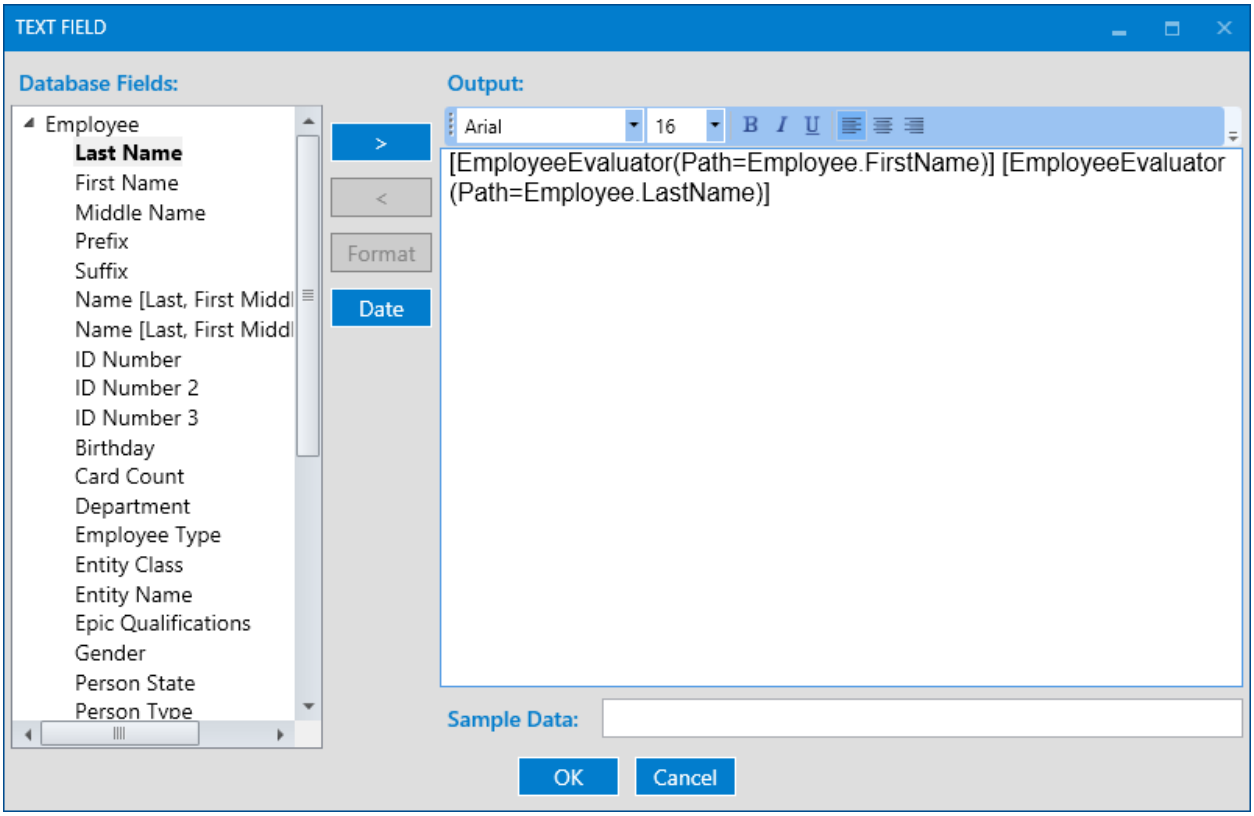
You can also combine static and variable information in the *Output* box.



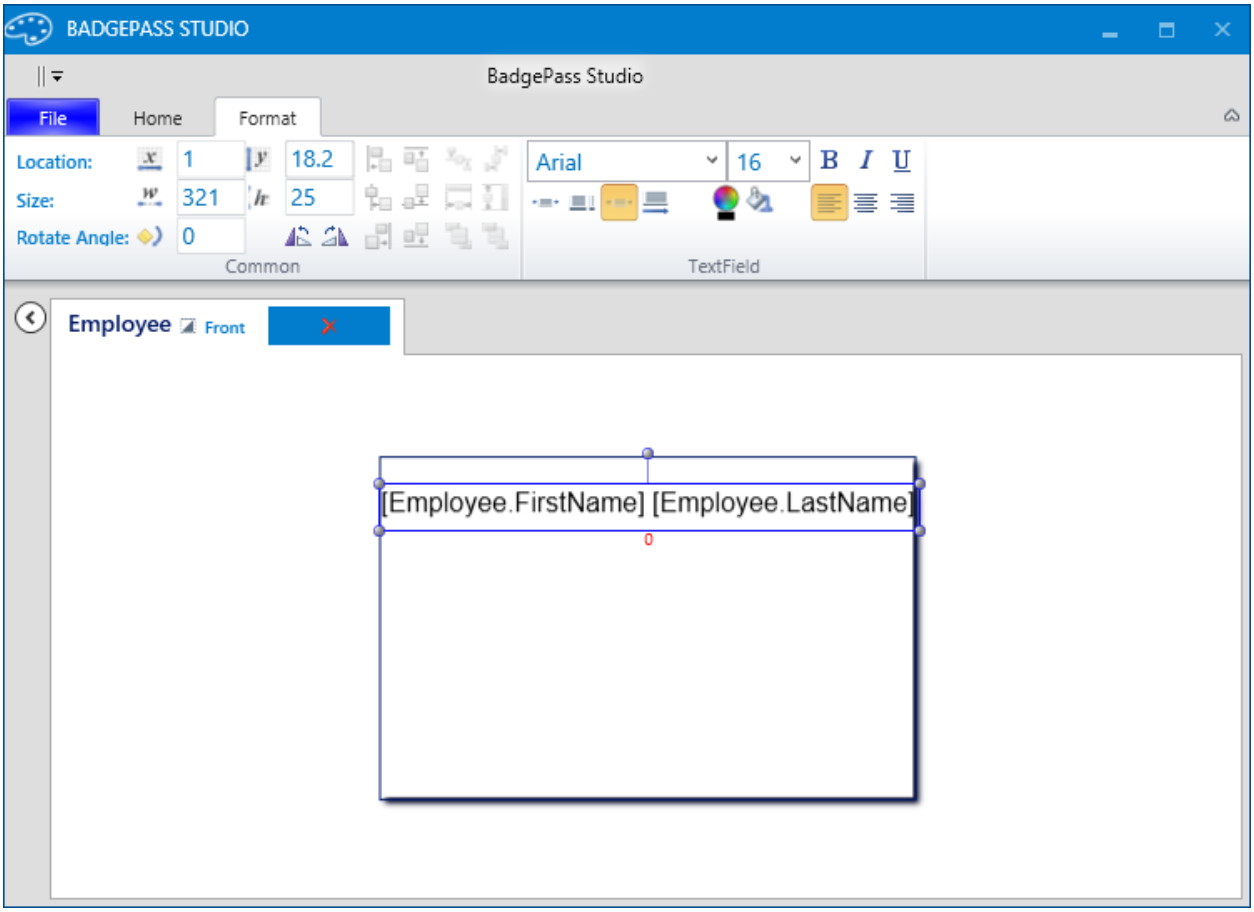
This would output a value similar to:

This Badge belongs to George Smith.

To add a name field, with the first and last name together, just double click the *First Name* field in the *Database Fields* column, press the space bar then double click the *Last Name* in the *Database Fields* column.

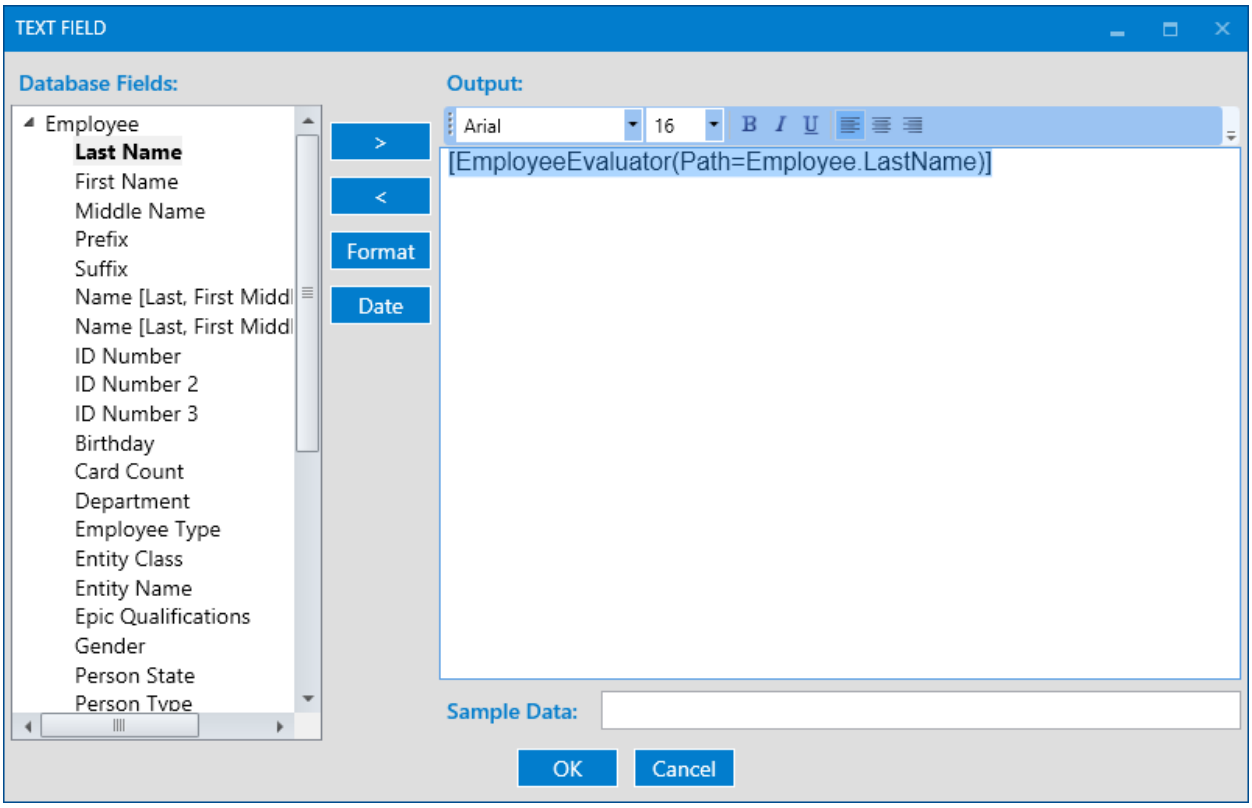


It will show up on the card template like the image below:

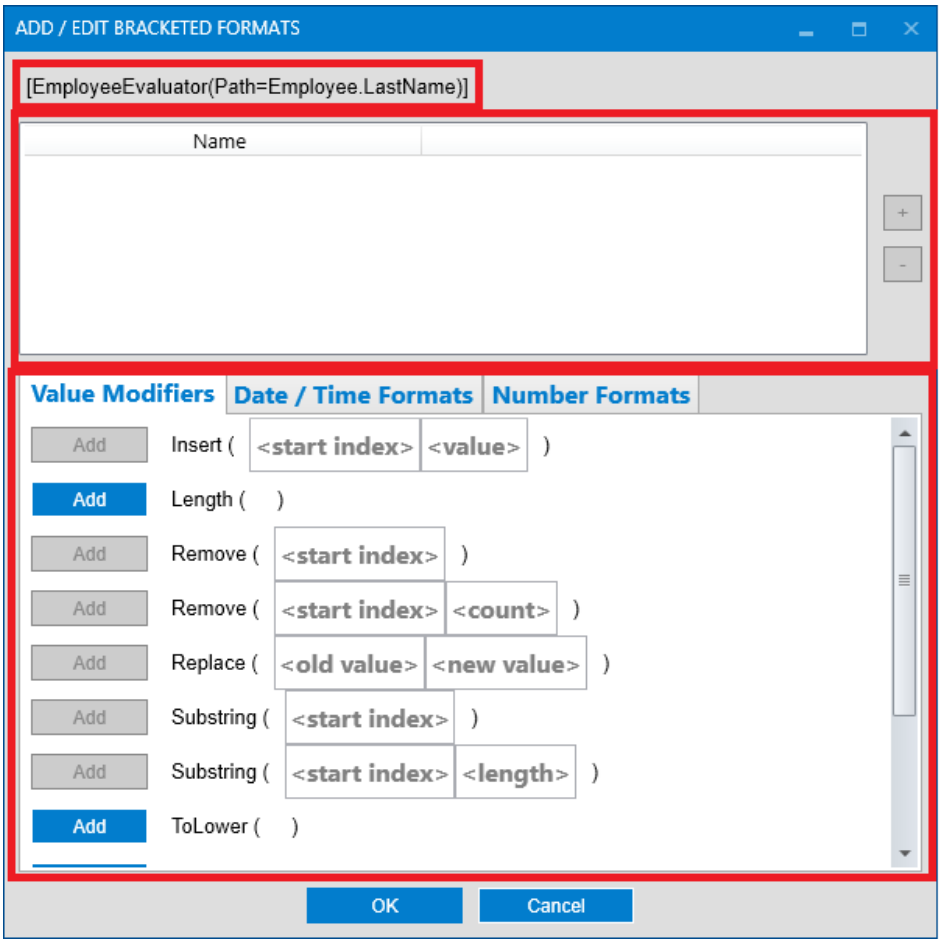


To add static text, single click on the text icon and type the text in the *Text Field* box and click the *OK* button.

Variable Information can be formatted. For example, the employee's last name might be Smith, but can be formatted such that it is printed in all caps and appears on the badge like SMITH. To format variable information, select it in the Output box. This will cause the Format button to become enabled.



Click the Format button and the following window appears.



The first thing you see is the variable information the formats will be applied to.
The area below that (which is empty right now), shows the list of formats that have been added.
The last tabbed area shows the different types of formats that can be added.

Note that more than one format can be applied to any given variable information. This is why there is a list of formats that have been added. The formats will be applied in the order they are listed using the result of the previously applied format as the input for the next format.

Use the Plus and Minus buttons to move the formats up and down.

The various types of formats that can be applied are *Value Modifiers*, *Date / Time Formats*, and *Number Formats*.

NOTE: All index values are 0 based meaning they start at 0 not 1.

Value Modifiers

Insert

This modifier will insert a specific value starting at a specific column within a substring.

Ex: The value of “George” with the following Insert format

Will produce “GeoArga”.

Length

This modifier will count the number of characters in the string and return the literal numeric value.

Ex: The value of “George” will output the number “6”.

Remove

This modifier will remove all characters to the right starting at the index (column).

Ex: With an index value of 3 the output of “George” would be “Geor”

Remove

This modifier will remove all characters to the right starting at the <Start index> (column) up to the number of characters specified in the <count> field.

Ex: With an index value of 1 and a length of 2 the value “George” would be “Gege”.

Replace

This modifier will replace all occurrences of the <old value> with the <new value>.

Ex: An <old value> of ‘e’ and a <new value> of ‘A’ and the field value of “George” would output “GAorgA”

Substring

This modifier will left truncate the field starting at the index value.

Ex: A <Start Index> of 3 and a field value of “George” would output “ge”

.

Substring

This modifier will left truncate the field starting at the index value up to the number of characters specified in the <length> field.

Ex: A <Start Index> of 1 and a <length> of 2 with a field value of “George” would output “Grge”

ToLower

This modifier will convert the entire field to lower case.

Ex: A string with a value of “George” would change to “george”

ToUpper

This modifier will convert the entire field to upper case.

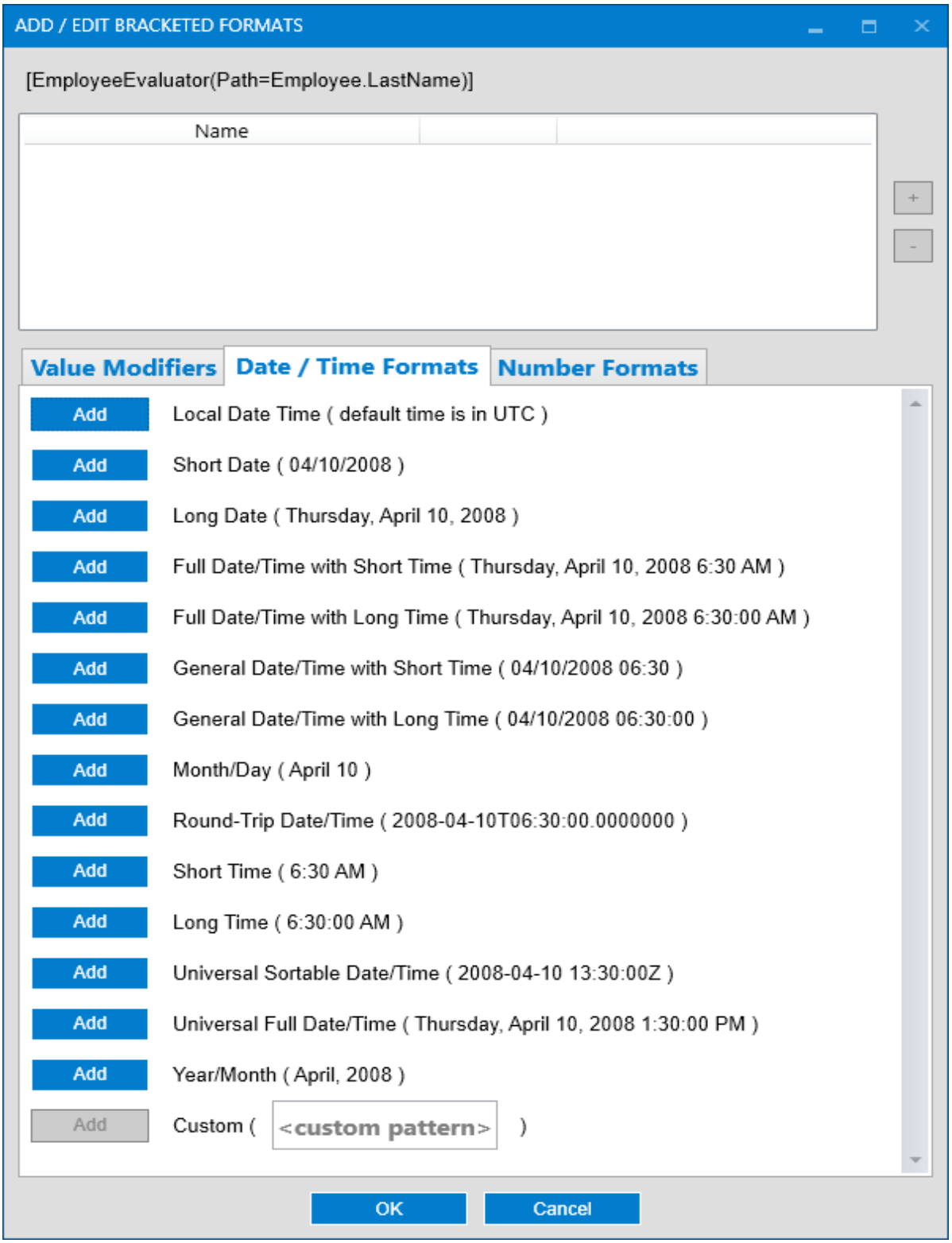
Ex: A string with a value of “George” would change to “GEORGE”

Trim

This modifier will remove all the spaces before the field as well as all trailing spaces.

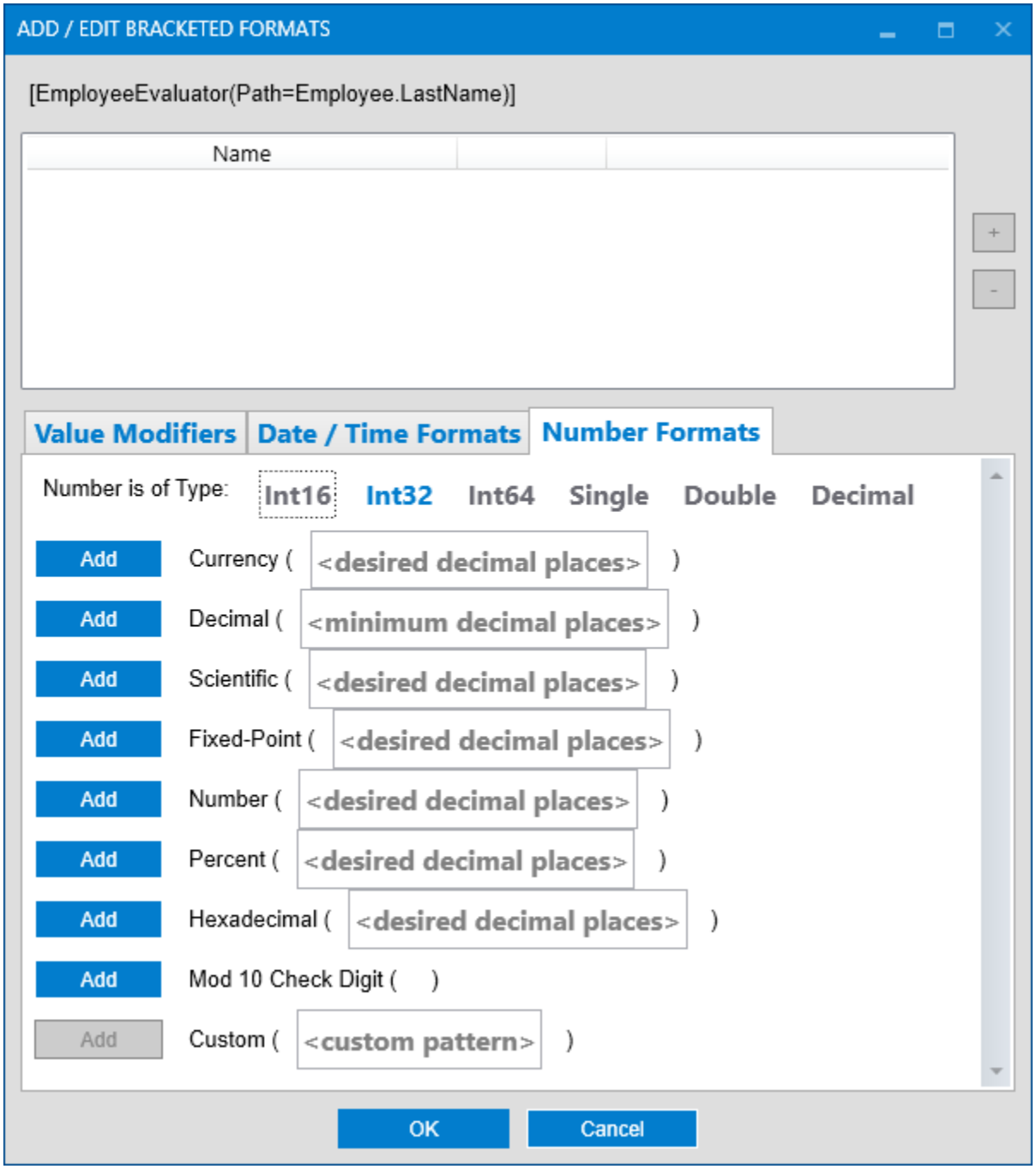
Ex: A string with a value of " George " would change to "George"

Date / Time Formats



The *Date / Time Formats* convert your date value to the specified format. See the examples next to each format for an explanation.

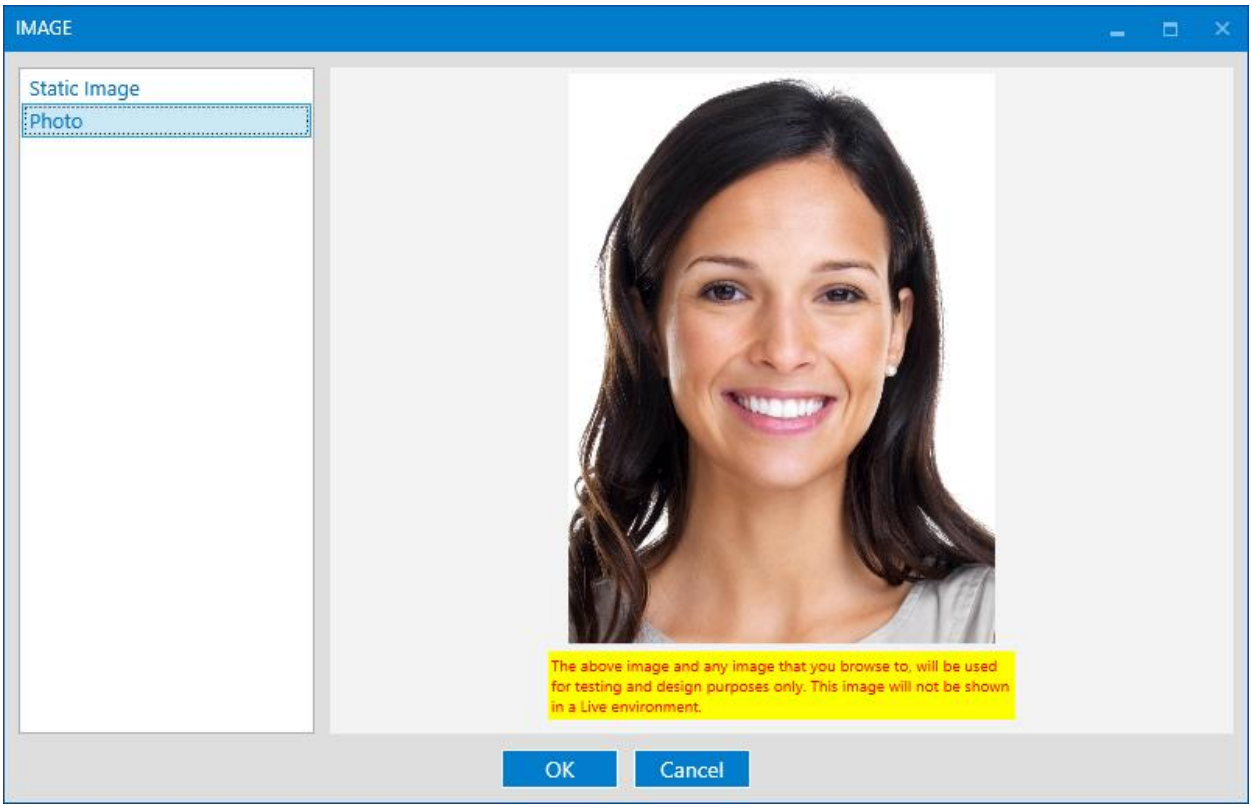
Number Formats



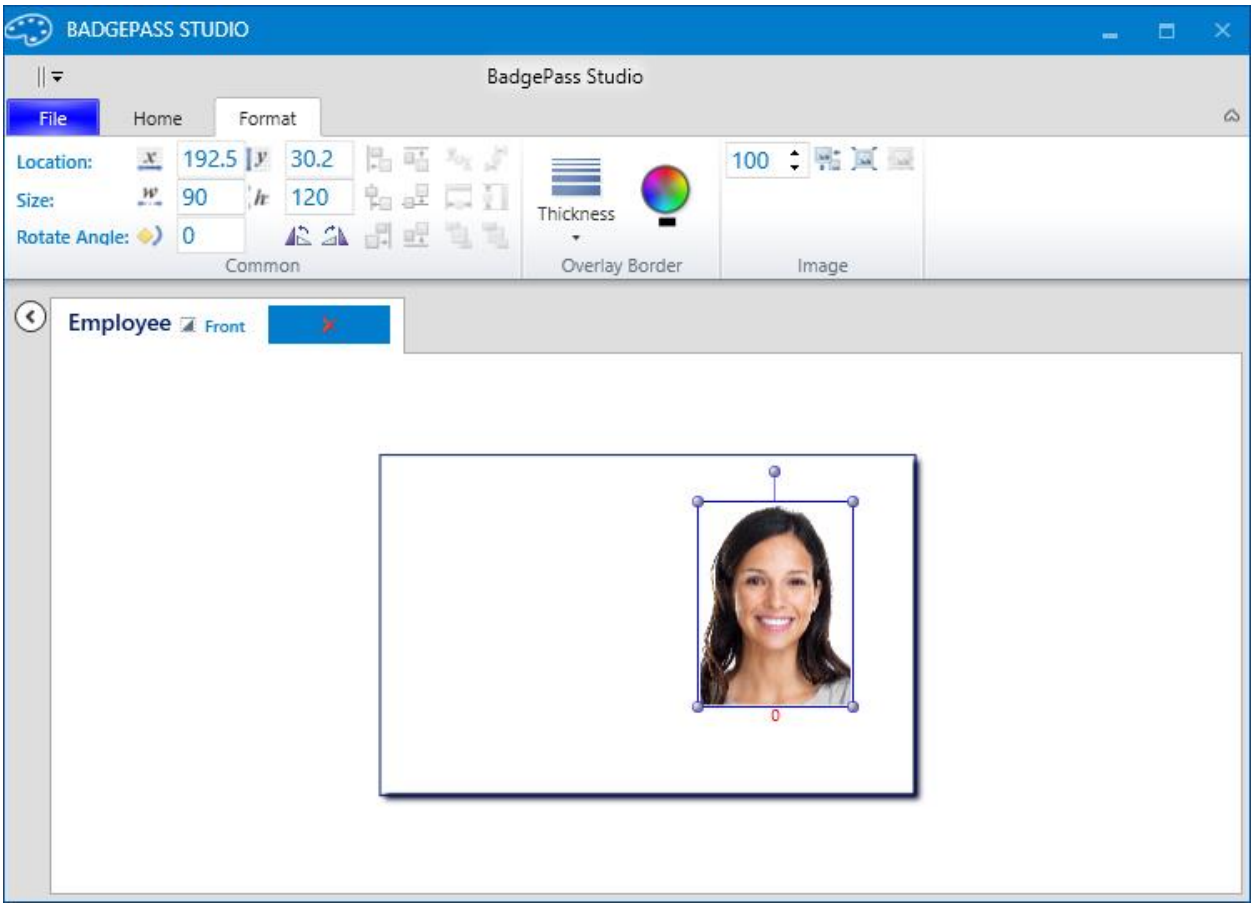
The *Number Formats* convert your numeric values to the specified format.

Image Field

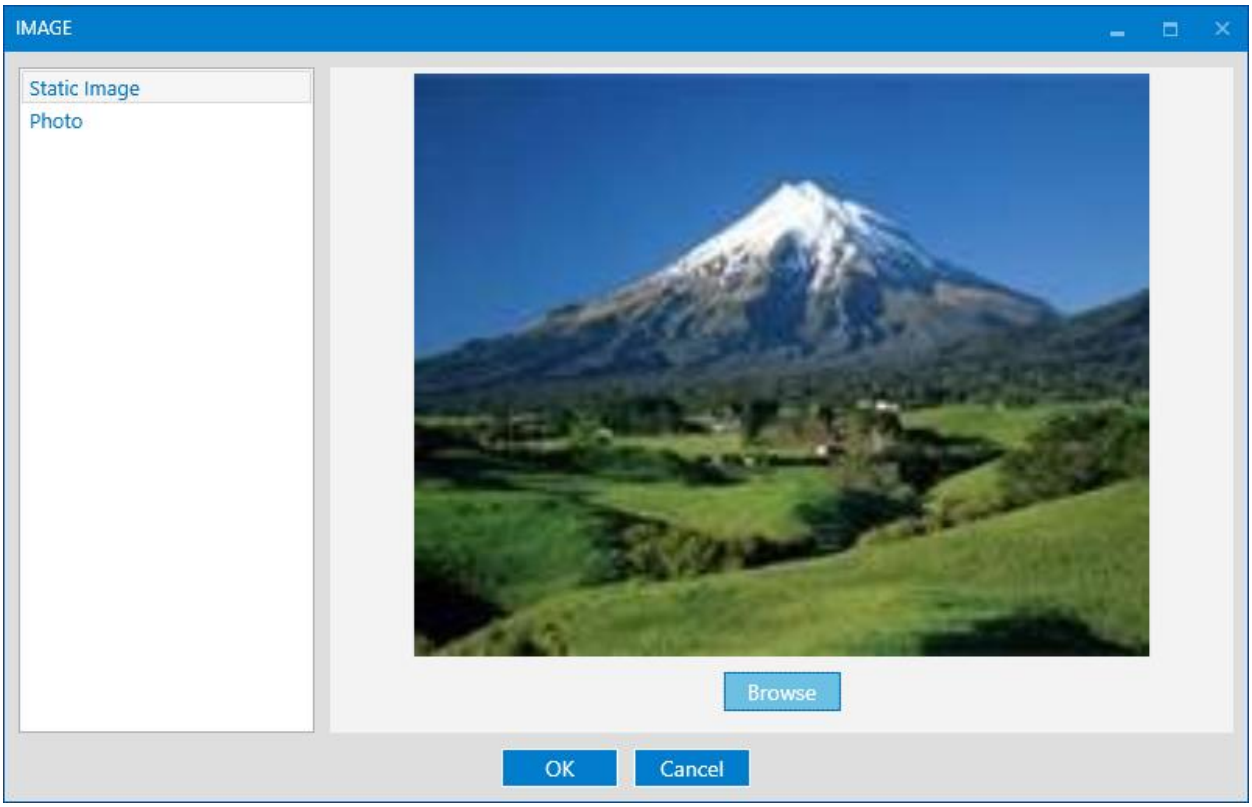
To add an image field to the badge, click on the *Image Field* icon. The following window will appear:



The left lists the image types that can be printed on the badge.
Static Image is an image that does not change no matter who the badge is being printed for.
The other items (such as Photo) are images that are images associated with the entity being printed. For images other than static images, what shows up in Studio is the woman's placeholder image. This image will be replaced by the entities image of that type during print.



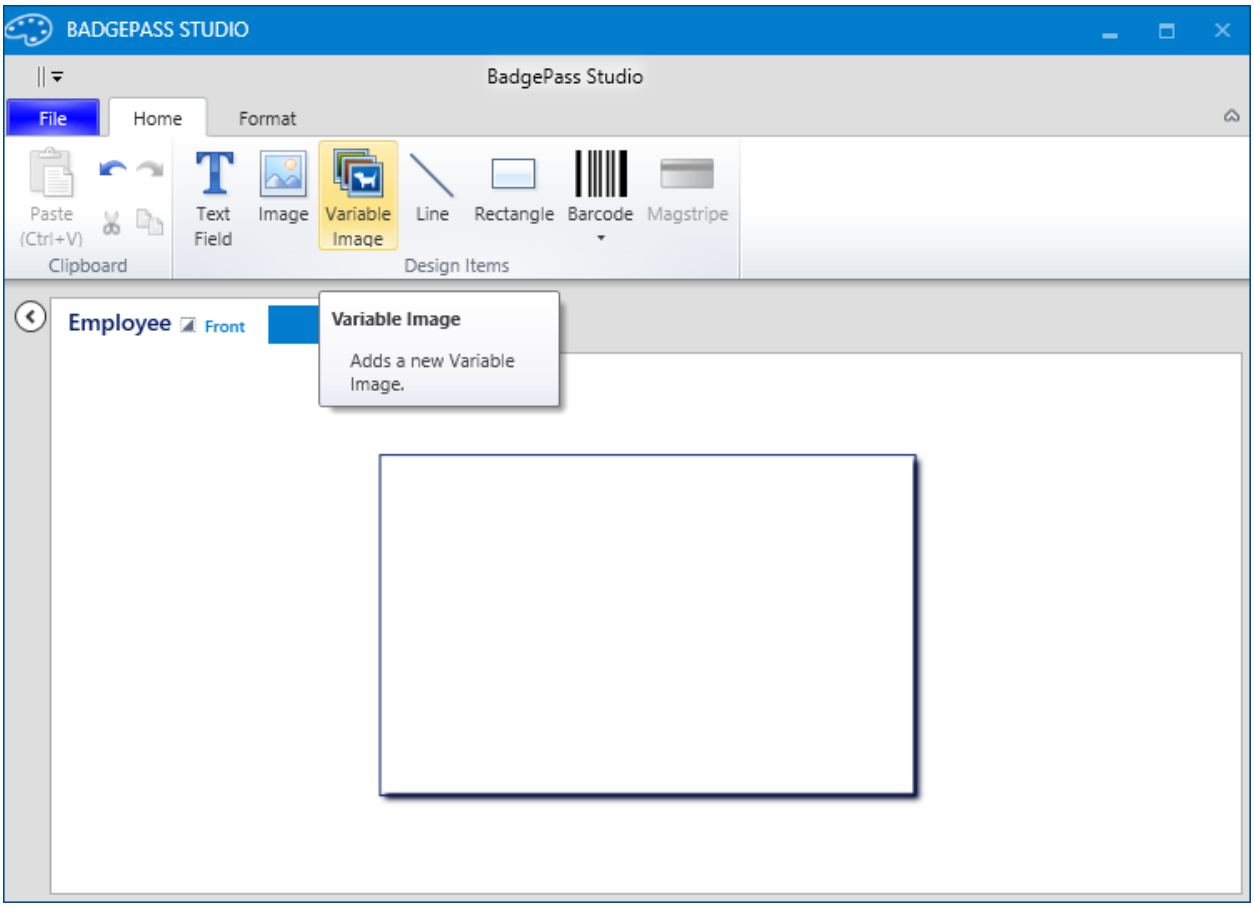
By selecting Static Image, a Browse button becomes enabled. Click the Browse button and navigate to the static image to add to the badge.

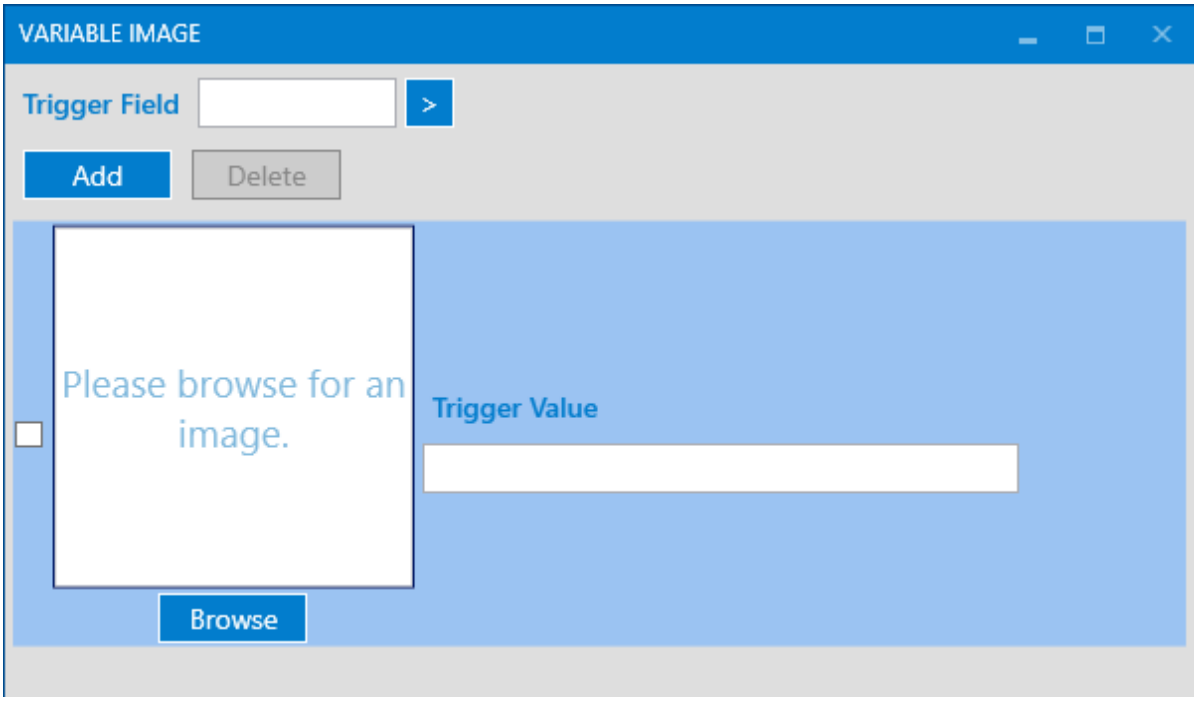


Variable Image Field

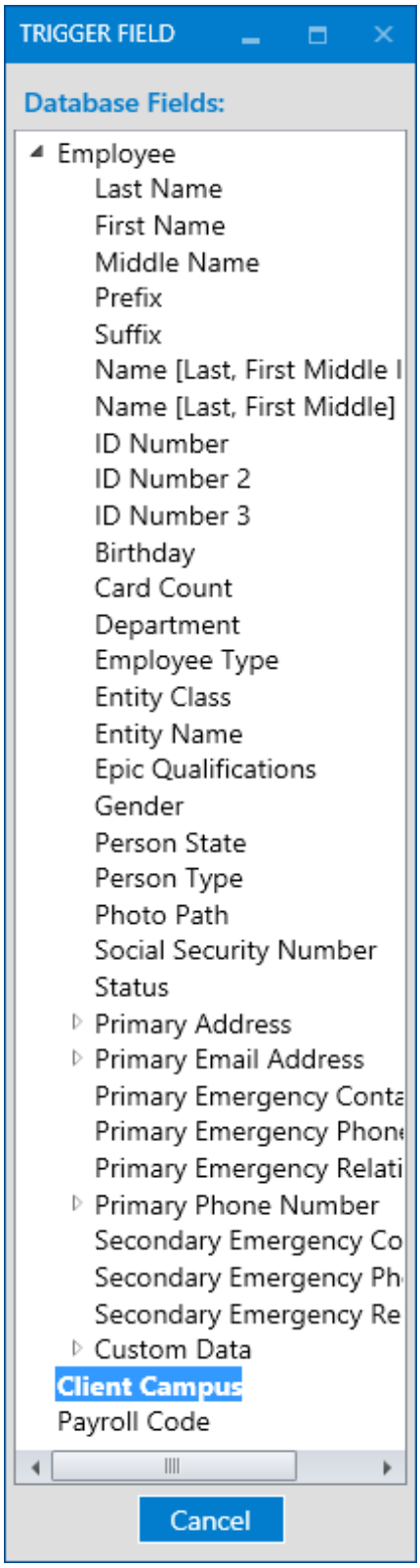
Variable Image allows for a group of images to be included, each with an associated value, only one of which will be printed during print depending on which image's value is correct for the given entity being printed.

On the Home tab, click Variable Image. This will open the Variable Image window.


BADGEPASS STUDIO
BadgePass Studio
File
Home
Format
Paste
(Ctrl+V)
Clipboard
Text
Field
Image
Variable
Image
Line
Rectangle
Barcode
Magstripe
Design Items
Employee
Front
Variable Image
Adds a new Variable Image.



Click on the button to the right of the Trigger Field's textbox (>). This will open the Trigger Field window showing all the fields available to be used as a Trigger Field.


TRIGGER FIELD
Database Fields:
Employee
Last Name
First Name
Middle Name
Prefix
Suffix
Name [Last, First Middle I
Name [Last, First Middle]
ID Number
ID Number 2
ID Number 3
Birthday
Card Count
Department
Employee Type
Entity Class
Entity Name
Epic Qualifications
Gender
Person State
Person Type
Photo Path
Social Security Number
Status
Primary Address
Primary Email Address
Primary Emergency Conta
Primary Emergency Phone
Primary Emergency Relati
Primary Phone Number
Secondary Emergency Co
Secondary Emergency Ph
Secondary Emergency Re
Custom Data
Client Campus
Payroll Code
Cancel

Double click on the field to be used as the Trigger Field. This will close the Trigger Field window and return to the Variable Image window with the Trigger Field set and indicated in the Trigger Field's textbox.

Bellow the Trigger Field is an Add button. This button adds an Image / Trigger Value pair.

There is also a delete button which will delete all the selected Image / Trigger Value pairs.

NOTE: To select an Image / Trigger Value pair, check the corresponding checkbox located at the beginning of the respective Image / Trigger Value pair row.

Add an Image / Trigger Value pair for each Trigger Field supported.

Each Image / Trigger Value pair has a browse button and a Trigger Value textbox.

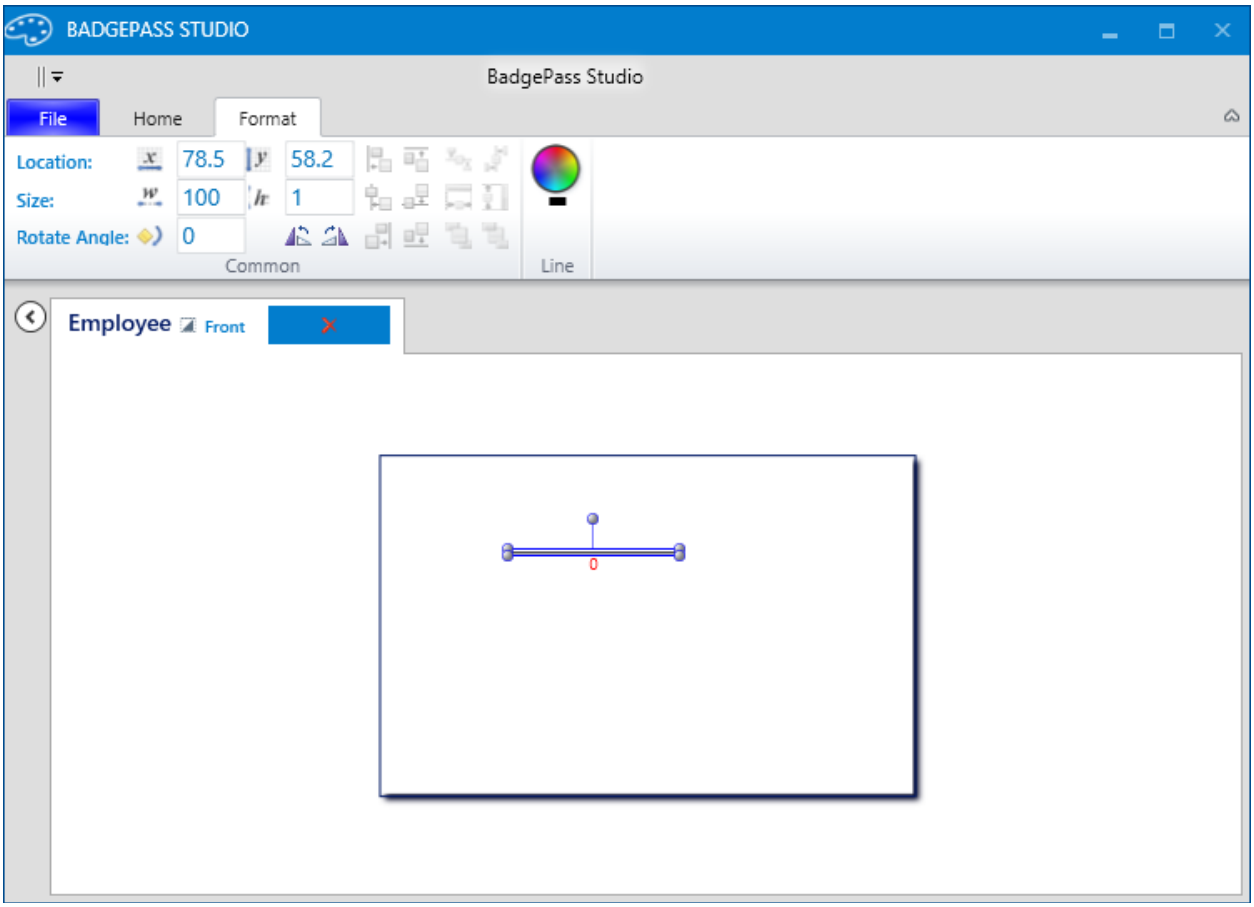
Browse for the image for the Image / Trigger Value Pair's Image.

Type in the value for the Image / Trigger Value Pair's Trigger Value.

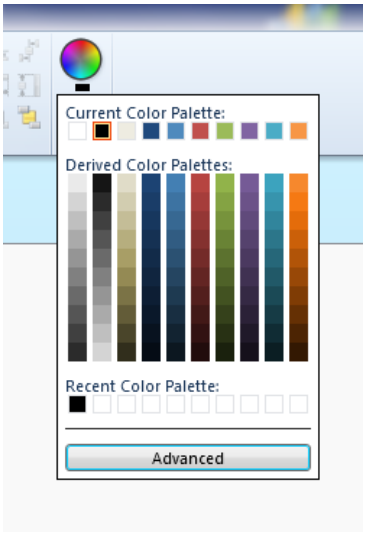
Click OK button when done.

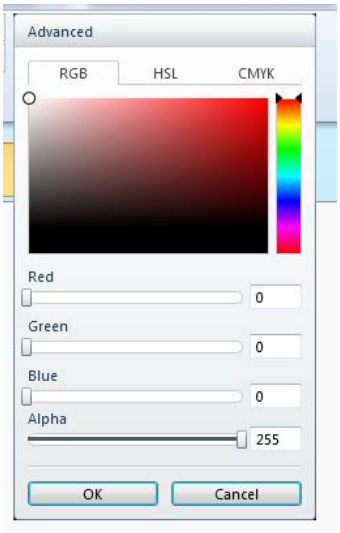
Line

To add a line to the badge, click on the *Line* icon. The line will show up on the card template. To change the attributes of the line click on the *Format* (see an explanation of the Format tab) tab with the line highlighted.



You can set the *Location*, *Size*, *Rotation* and *Z order* in the *Common* area of the ribbon. You can set the color in the *Line* area of the ribbon. Click on the color icon.

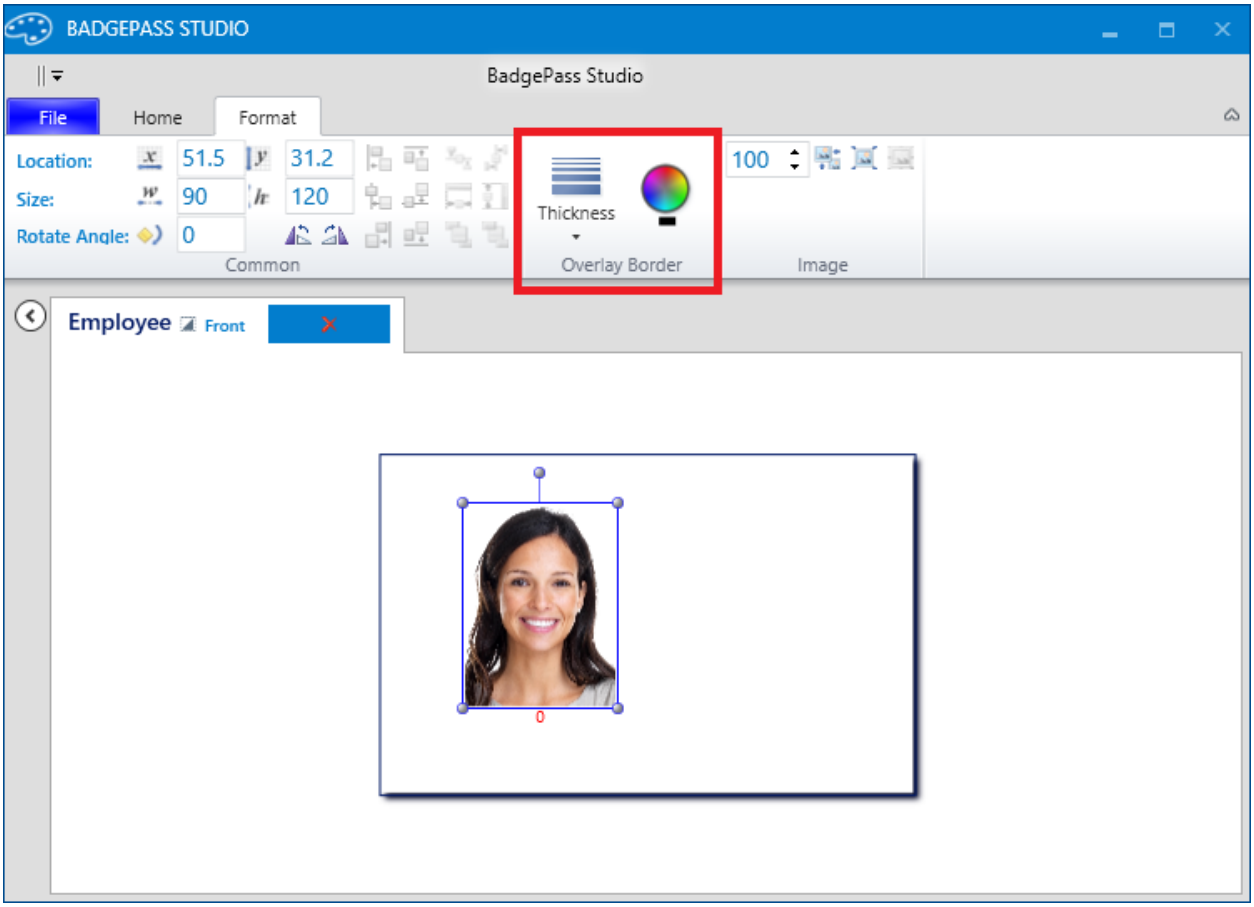




Click on the *Advanced* button to manually change the color settings. You can also set the transparency of the fill color of the line by changing the *Alpha* settings.

HSL is where you can change the Hue, Saturation and Lightness.
CYMK is where you will change the CYMK color settings.

Both Image and Variable have a border overlay. You can adjust the thickness of the border from the Format ribbon tab. You must only have one item selected and it must be an image or variable image for this option to be available.

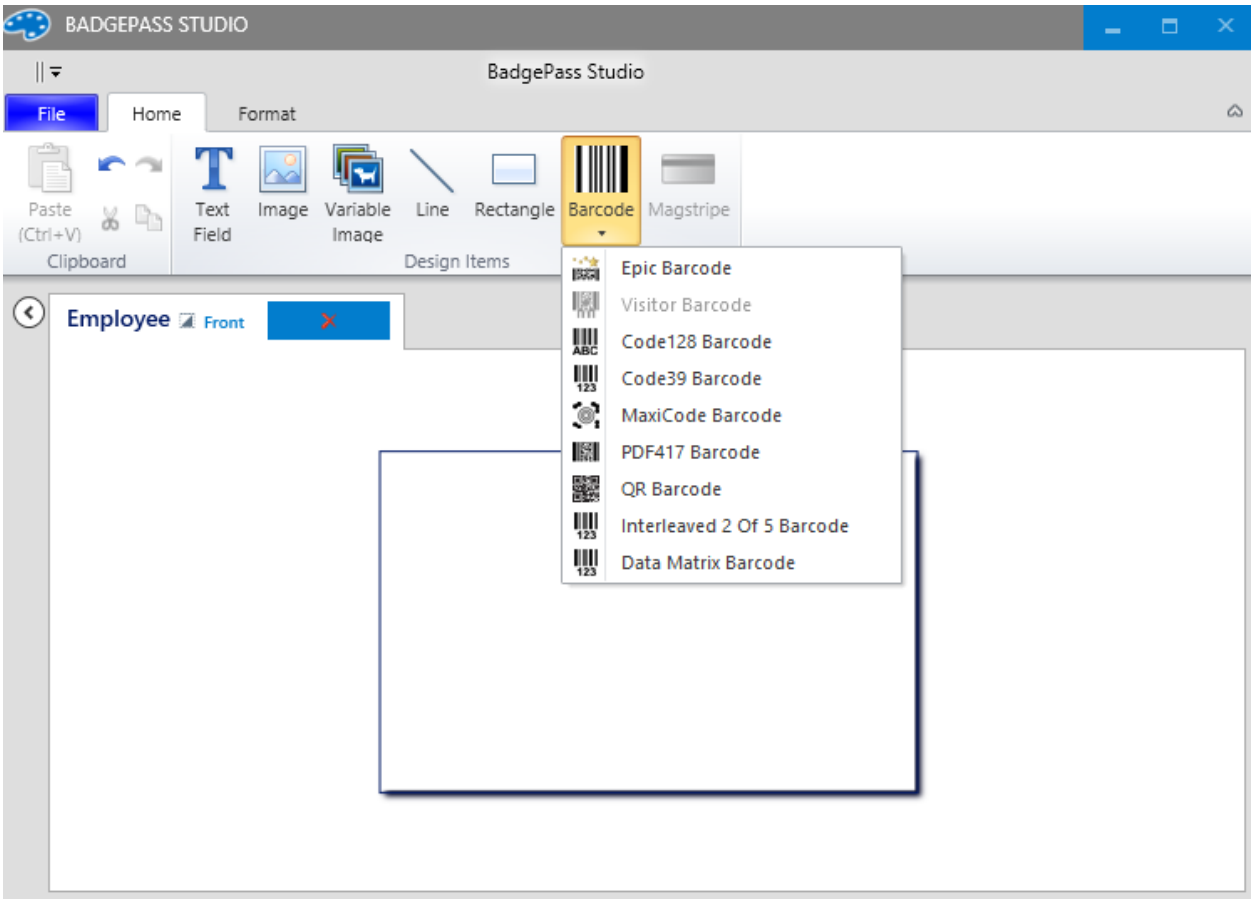


Rectangle

To add a rectangle to the card design, click on the *Rectangle* icon. The rectangle will show up on the card template. To change the attributes of the rectangle, click on the *Format* tab with the rectangle highlighted. On this tab you can set the *Location*, *Size*, *Rotation* and *Z Order* in the *Common* area of the ribbon. In the *Rectangle* area of the ribbon, the *Weight*, *Outline* color and *Fill* color can be set as well.

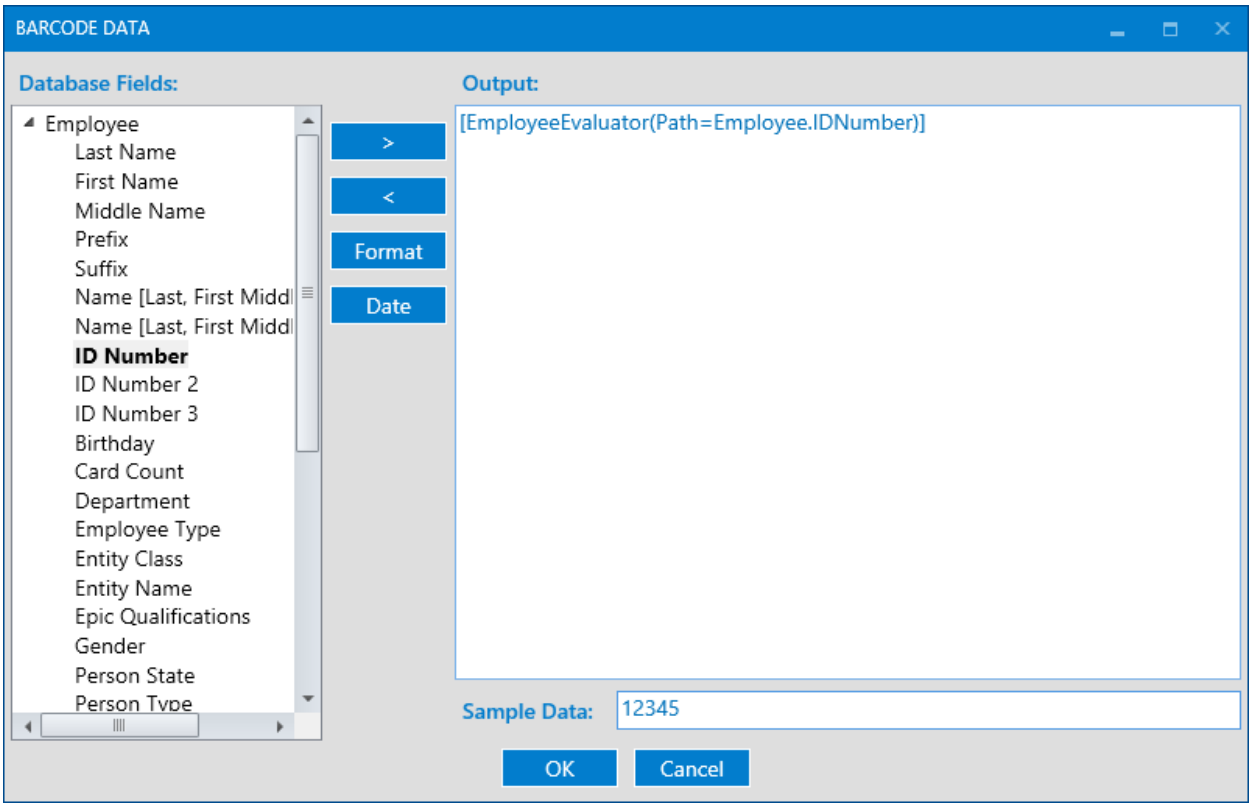
Barcode

There are 9 barcode formats available: *Epic Barcode*, *Visitor Barcode*, *Code 128 Barcode*, *Code 39 Barcode*, *Maxi Code Barcode*, *PDF 417 Barcode, QR Barcode, Interleave 2 Of 5 Barcode, and Data Matrix Barcode*.



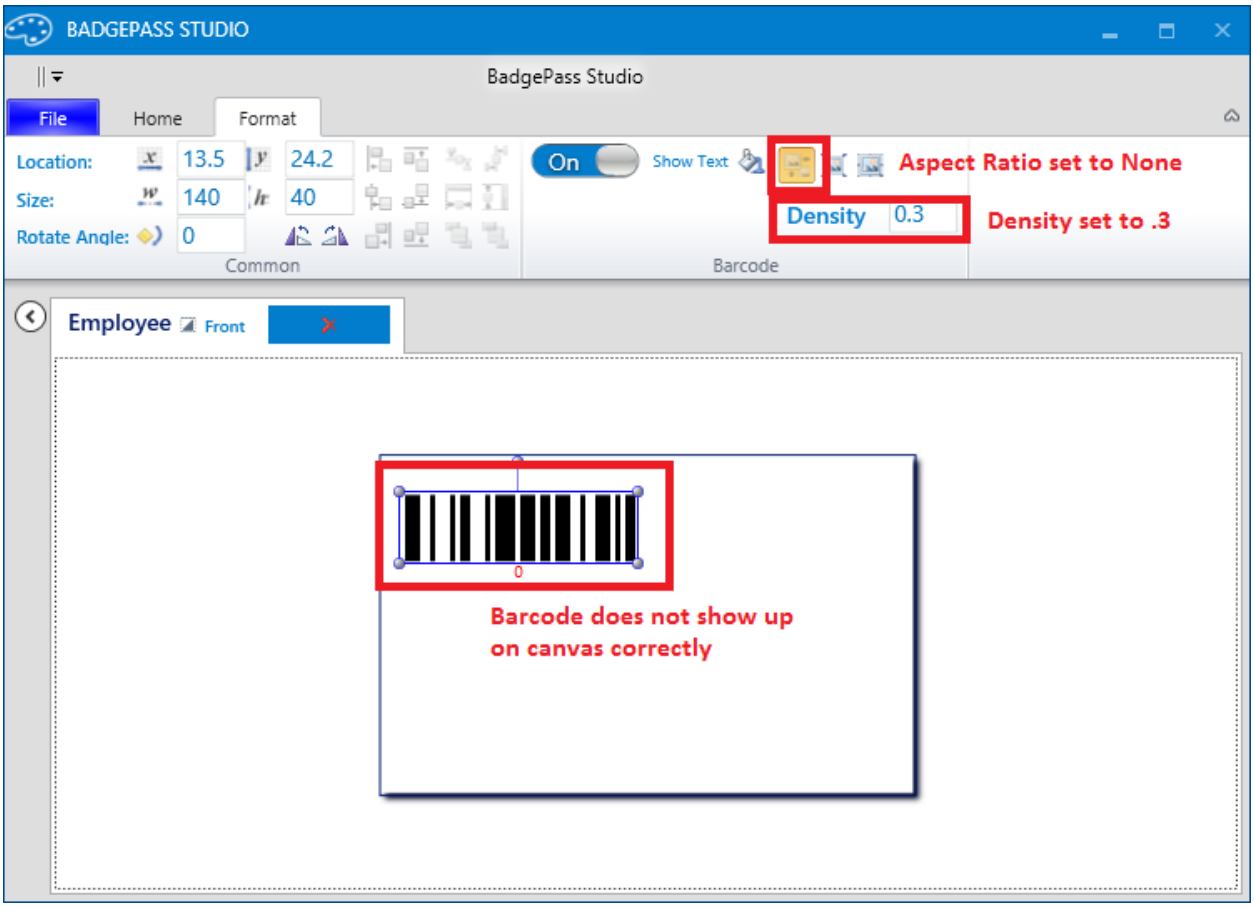
Visitor Barcode is only enabled if the entity type is a Visitor. The Visitor Barcode is used by the auto check out feature found in the Visitor Manager module.

Click on the *Barcode* icon and select the barcode type you want to add to the badge. The *Barcode Data* window will appear. This window is just like the Text Field Data window. Add static and variable information to the Output box. Add sample data to the sample data area. Format variable information as desired.

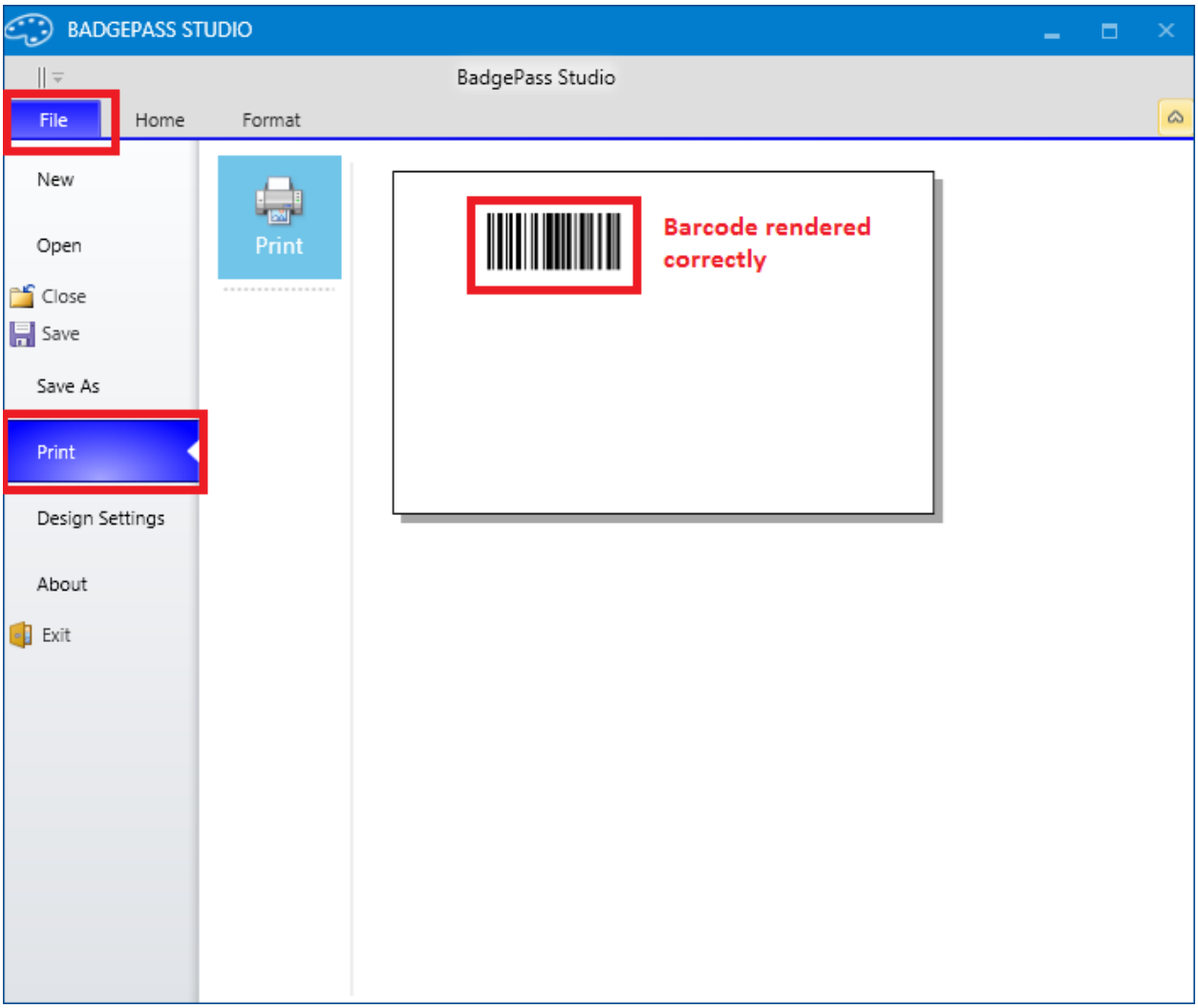


You can set the *Location*, *Size*, *Rotation* and *Z Order* in the *Common* area of the ribbon. Additionally, (depending on the barcode type), whether the barcode's data shows up in a human readable format, the background color, the aspect ratio of the barcode and the density of the barcode can be set in the *Barcode* area of the ribbon.

Density is only available if the aspect ratio is set to none. Otherwise density is set internally by the barcode builder.
Note that if you set the aspect ratio to none to manually set density, the barcode will NOT appear on the canvas as it will when it is printed. When the barcode is placed on the canvas (as with any design item) it is put inside of container that allows you to move / resize / and rotate the design item. After much effort, we were told by the third party vendor we use to generate the barcodes that since they could get it to work outside the container, that they were closing the support ticket. Below is how a Code 128 looks on the canvas with the aspect ratio set to none and the density set to .3.



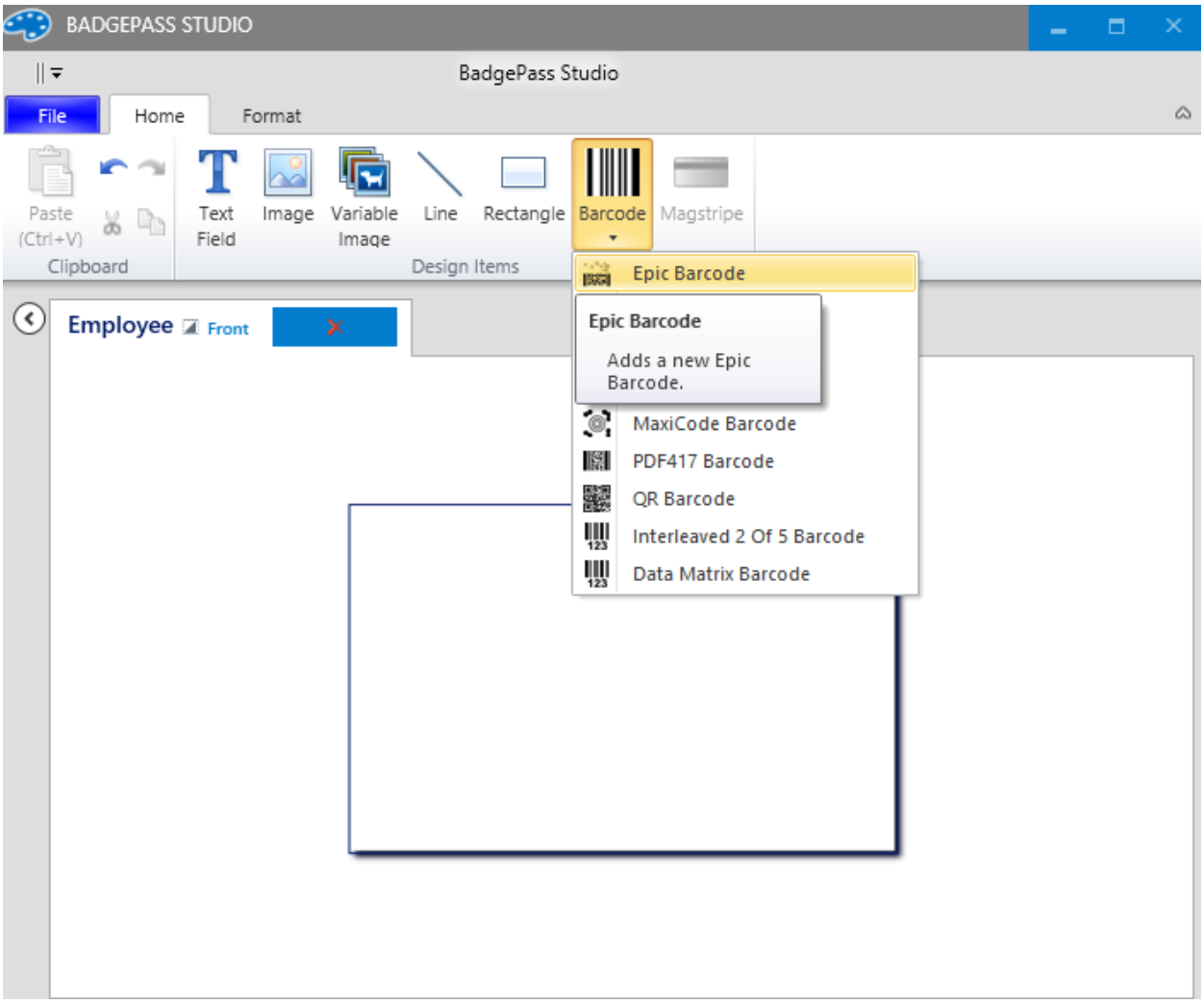
To see how the barcode will be printed, select File > Print and the preview of the badge will be displayed. Since the preview is generated outside the container, the barcode vendor is able to render the barcode correctly.



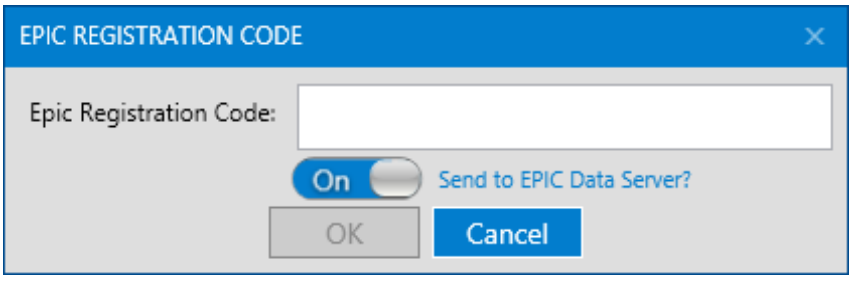
Epic Barcode

With the release of BadgePass 3.1, the BadgePass Studio has been updated to include a new barcode format: The *Epic Barcode*. The *Epic Barcode* can be added to all entity type designs, except for Visitor. Additionally, it is added to a design just like any other barcode type.

To add an Epic Barcode, begin by clicking on the *Barcode* icon in the ribbon menu and selecting Epic Barcode:

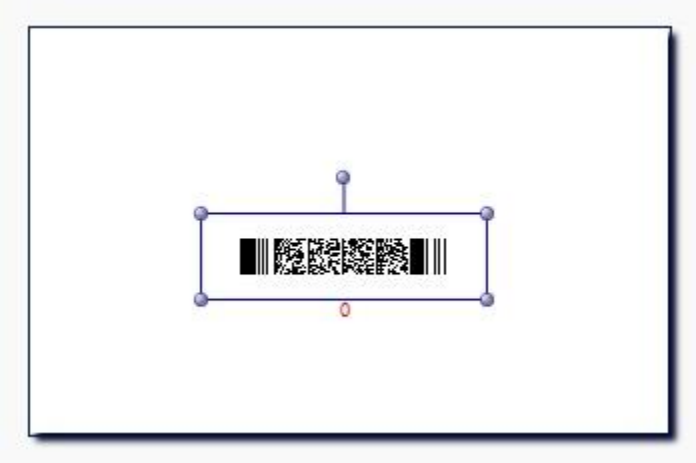


Next, you will be presented with an *Epic Registration Code* window. Here you will be required to enter your *Epic Registration Code* you obtained in order for the barcode to be added to the design. Below is an image of this window:



Also on this window is a checkbox labeled *Send to EPIC Data Server*. It is recommended that is option is always selected. By selecting this option, whenever an entity is saved in Identity Manager and the badge associated with said entity has an *Epic Barcode*, then the barcode's data is transmitted to the EPIC Data Server.

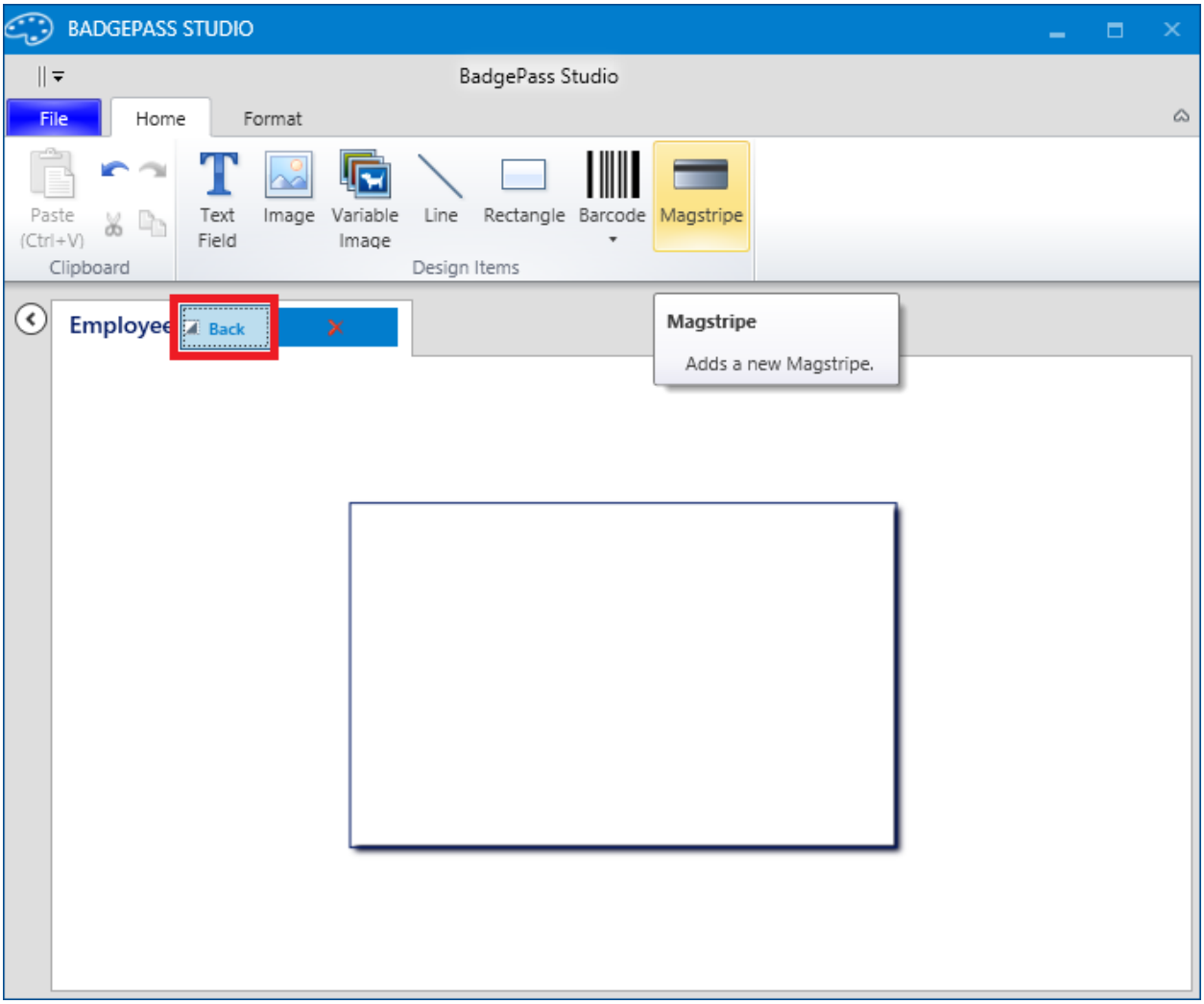
Below is an example of an *Epic Barcode* that has been added to a design:



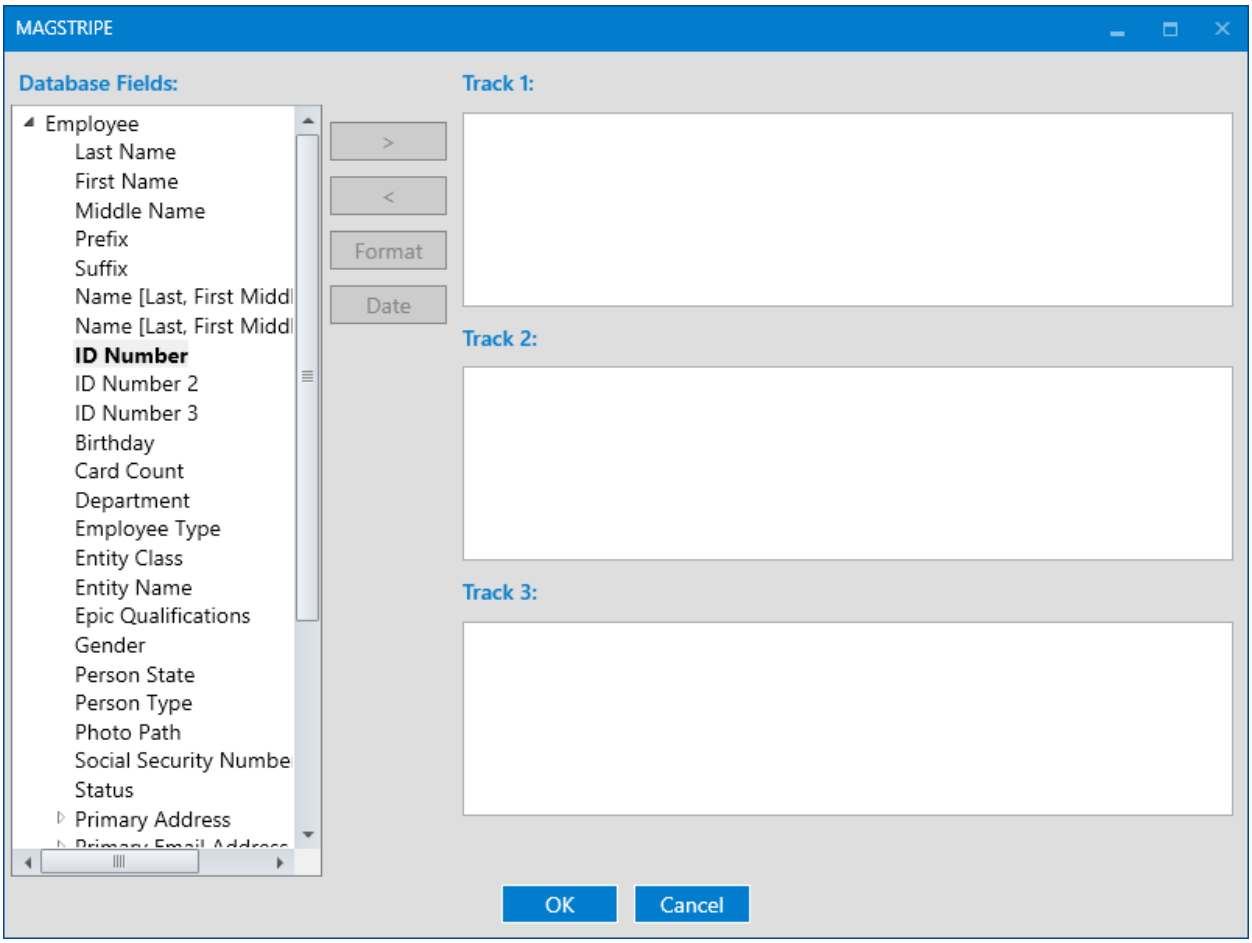
Just like all of the other barcode formats, by clicking on the Format tab (after selecting the Epic Barcode) you can adjust Common properties such as Location, Size, Rotation, Z Order. Depending on the barcode type, you can adjust Barcode properties such as Background Color, Show Text, Aspect Ratio, and Density.

Magstripe

When designing a card, a *Magstripe* can only be added to the back of a card design. As such this icon will only be enabled while you are working on the back of a card design. To work with the backside of the card, click on the word *Front* in the design area tab. When clicked, the value will change to *Back* showing that you are working with the backside of the card.



To add a *Magstripe* field to the card, click on the *Magstripe* icon. The following window will appear:



You can add variable or static data to each track. Keep in mind that Track 1 follows IATA Magstripe rules, track 2 follows ABA Magstripe rules and track 3 follows TTS Magstripe rules. Click in the desired mag track box and enter the data that you want to encode. When finished, click the *OK* button.

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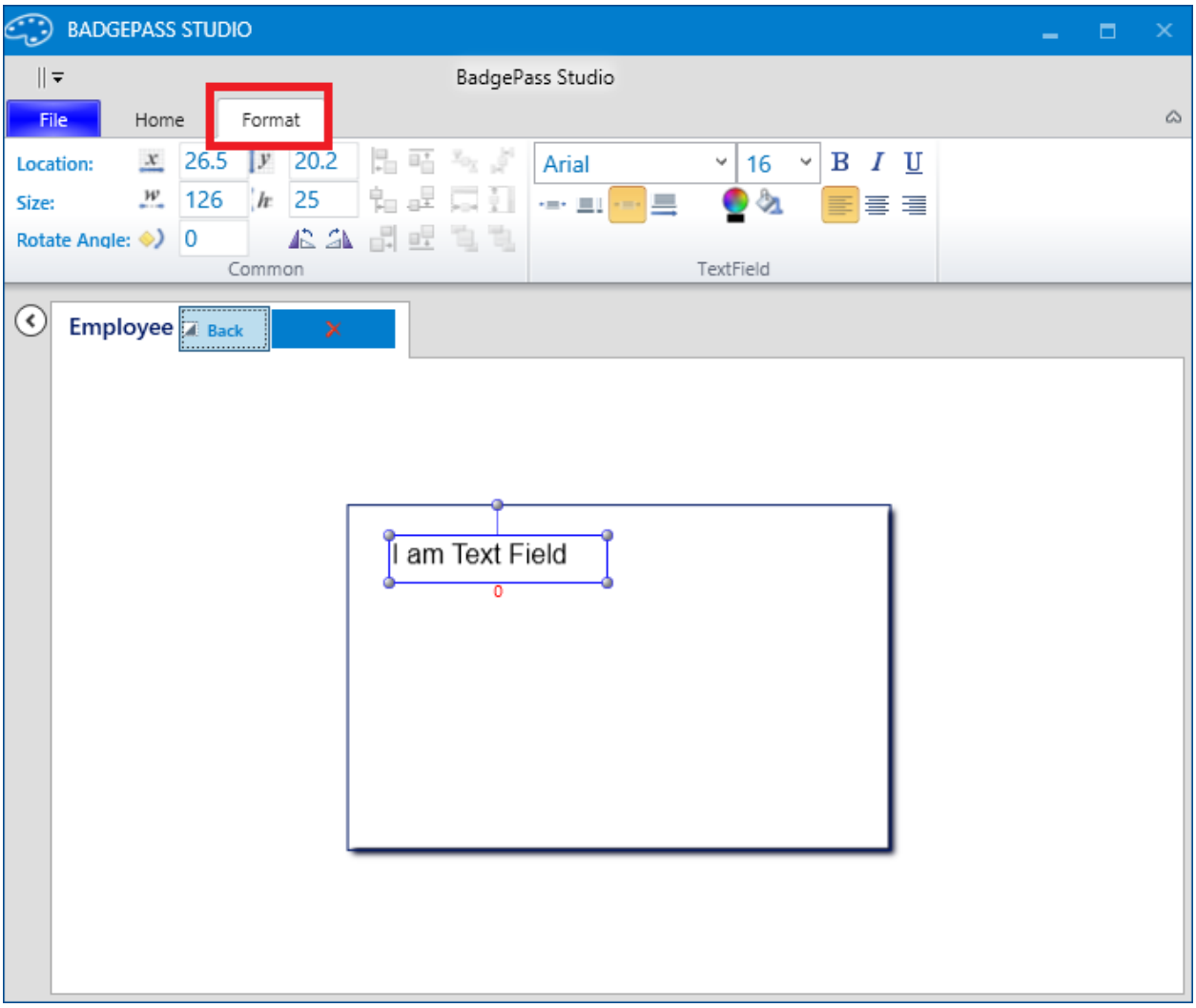
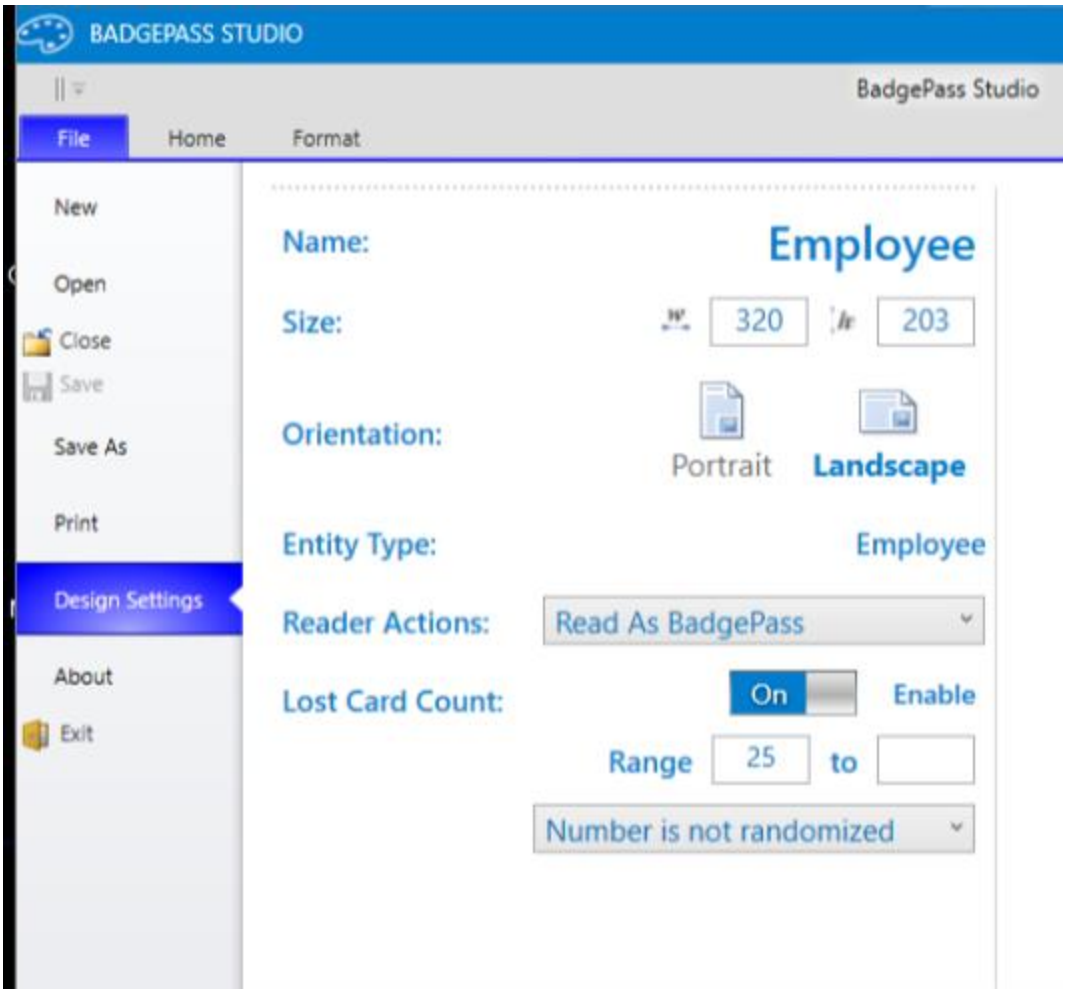
Format Tab

To change attributes on a *Text Field*, *Image*, *Variable Image*, *Line*, *Rectangle* or *Barcode*, highlight the particular item and click on the *Format* tab at the top.



The *Format* tab allows you to set the *Location*, *Size*, *Rotation* and *Z Order***.** These are found in the *Common* area of the ribbon. In the example above we see what would be present on the *Format* tab when having selected a Text Field. Additionally, depending on the type of item you have selected on the badge design, there will be another section on the ribbon bar that allows you adjust other item-type-specific properties. Our example above shows a *Text Field* section where you can set various font properties and overflow properties.

Setting Design Settings



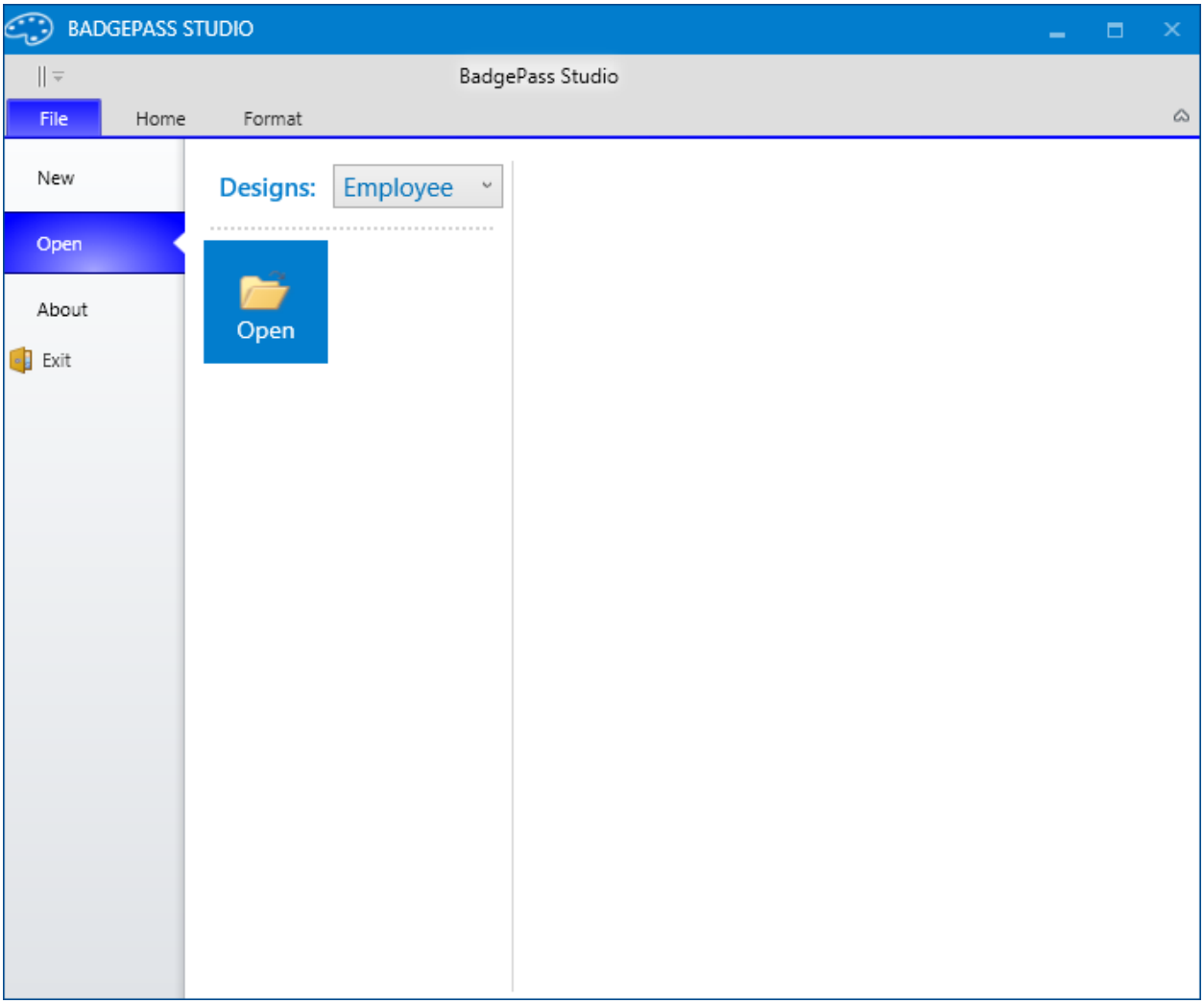
With your design selected, click on *File* tab and *Design Settings* menu item to edit / show the design's Name, Size, Orientation, Entity Type, Reader Actions and Lost Card Count design settings.

- Name - Shows the badge's name
- Size - The width and height of the badge.
- Orientation - Quickly switches the width and height of the badge to the other.
- Entity Type - Shows the entity type the badge is associated with it.
- Reader Actions - Indicates what action(s) will be taken with regards to Prox / Moca settings when printing the badge.
    - None – Indicates that the printing action should do nothing.
    - Read As BadgePass – Indicates that the printing action should read the Moca number during print.
    - Read As Prox – Indicates that the printing action should read the Prox number during print.
    - Call Client Plugin – Indicates that during print, while the card is parked over the smart card reader in the printer, call the plugin manager. For example,

DataWriter plugin is a plugin that uses the smart card reader to writes data to a Moca card.
    - Read As BadgePass + Call Client Plugin – Indicates that the printing action should read the Moca number and call a plugin during print.
- Lost Card Count – Indicates how the Lost Card Count will be calculated during print.
    - Enable – Indicates if the Lost Card Count is updated at all during print.
    - Range Start – Indicates the minimum Lost Card Count.
    - Range End – Indicates the maximum Lost Card Count. This is an optional value. If not set, then reverts to the default value of 32767.
    - Randomize – Indicates the randomization action of the Lost Card Count.
        - Number is not randomized – Indicates that the number is not randomized but incremented by one.
        - First number is randomized – Indicates that the first number for an entity is randomized between the Start and End Range and then incremented after that.
        - Number is always randomized – Indicates that the number is always randomized between Start and End Range. The number is guaranteed to be different.

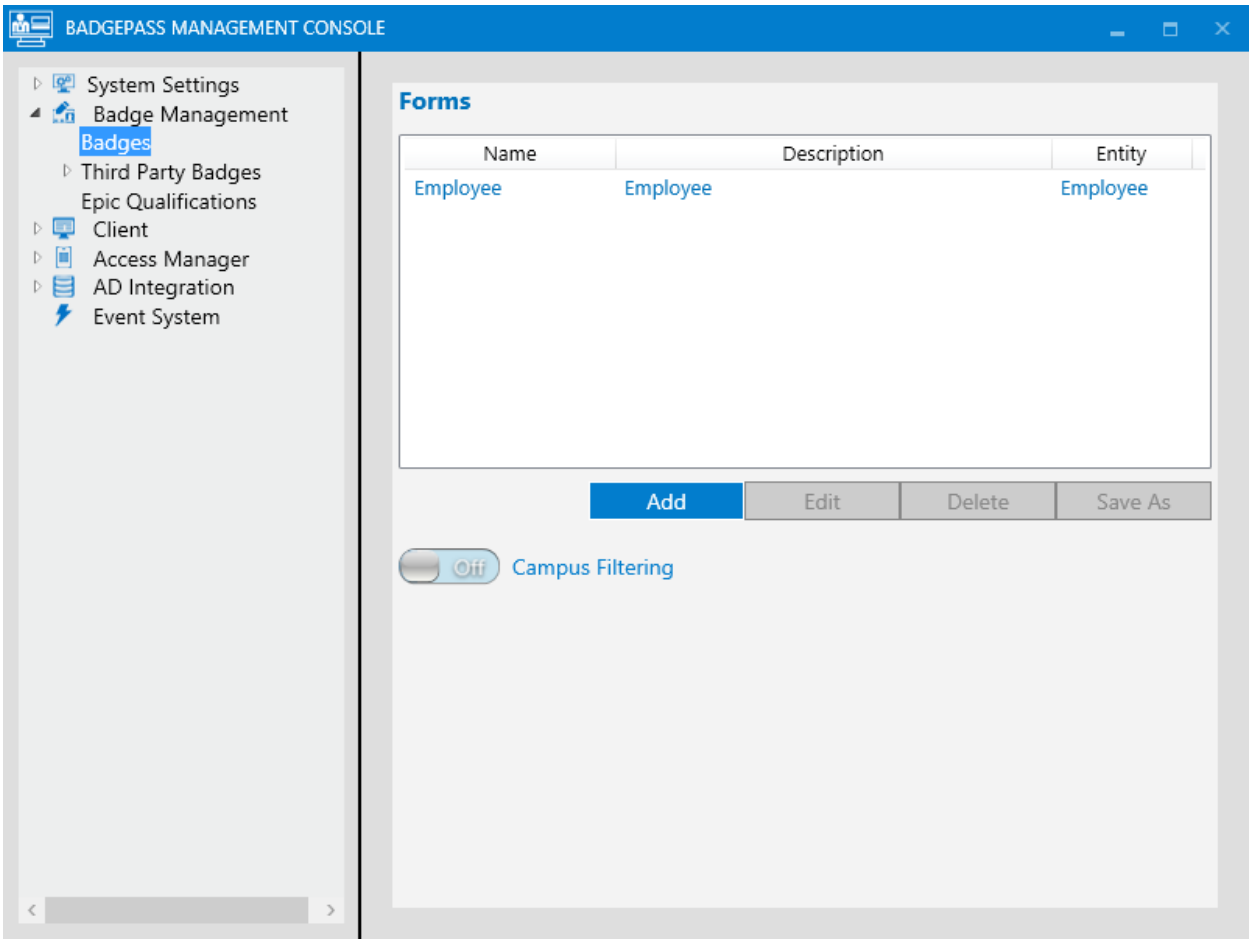
Opening and Saving a Design

When you are done with your design click on the *File* tab and click *Save*. To open an existing design, click on the *File* tab, click on *Open*, choose the design from the *Designs* drop down list and click the *Open* button.

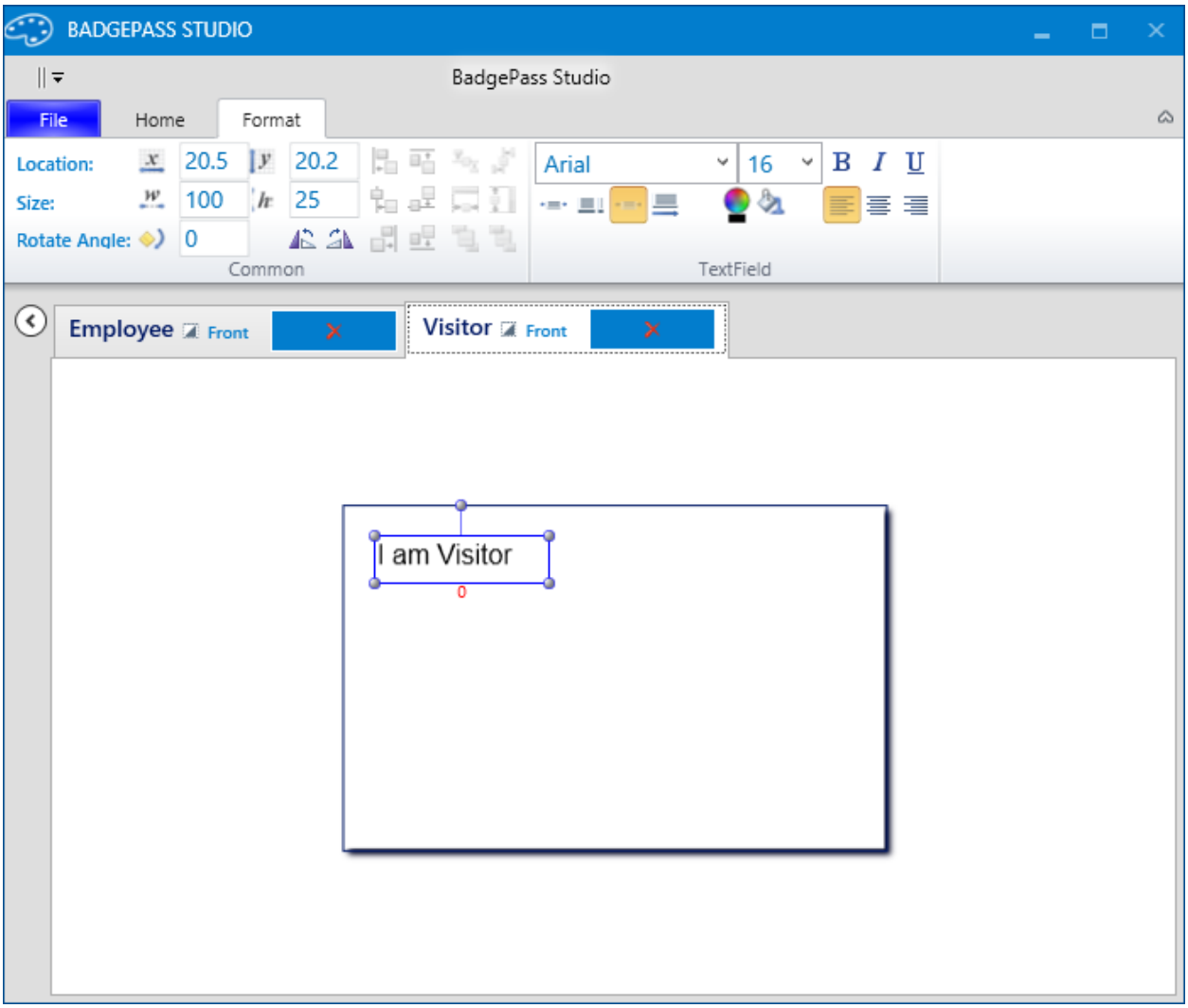


Connected Mode

When you save a design and are in *Connected Mode*, the designs are automatically saved to the BadgePass Suite. You can find them in the BadgePass Management Console under Badge Management -> Badges.

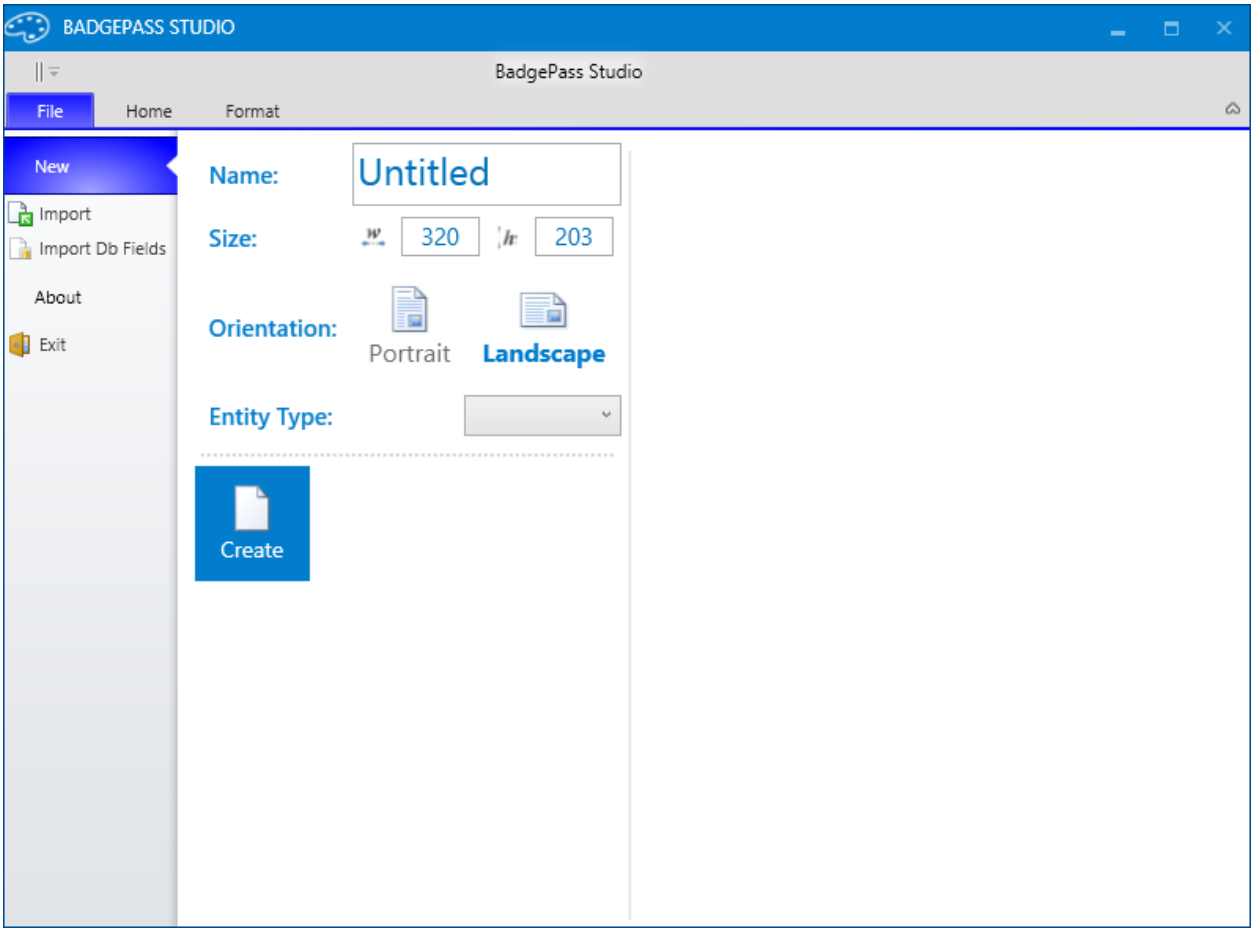


You can have multiple design screens open. They will each have a tab that you can click on.



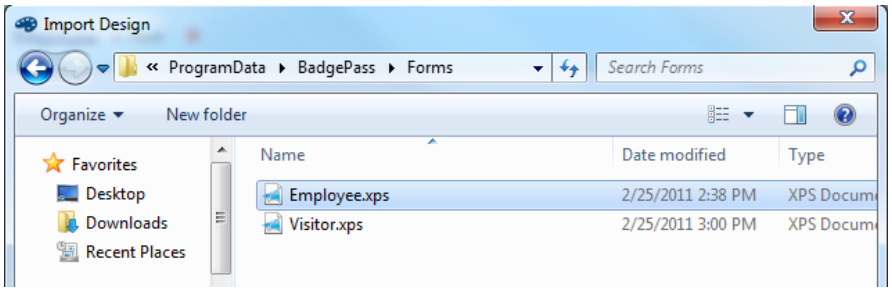
Disconnected Mode

When BadgePass Studio is installed in *Disconnected Mode*, there will be different choices in the *File* tab menu.



The *Disconnected Mode* gives you the ability to *Import* existing badge designs. Also, you can *Import Database Fields*. By importing the database fields, you are able to add database fields to the badge design, even while in *Disconnected Mode*.

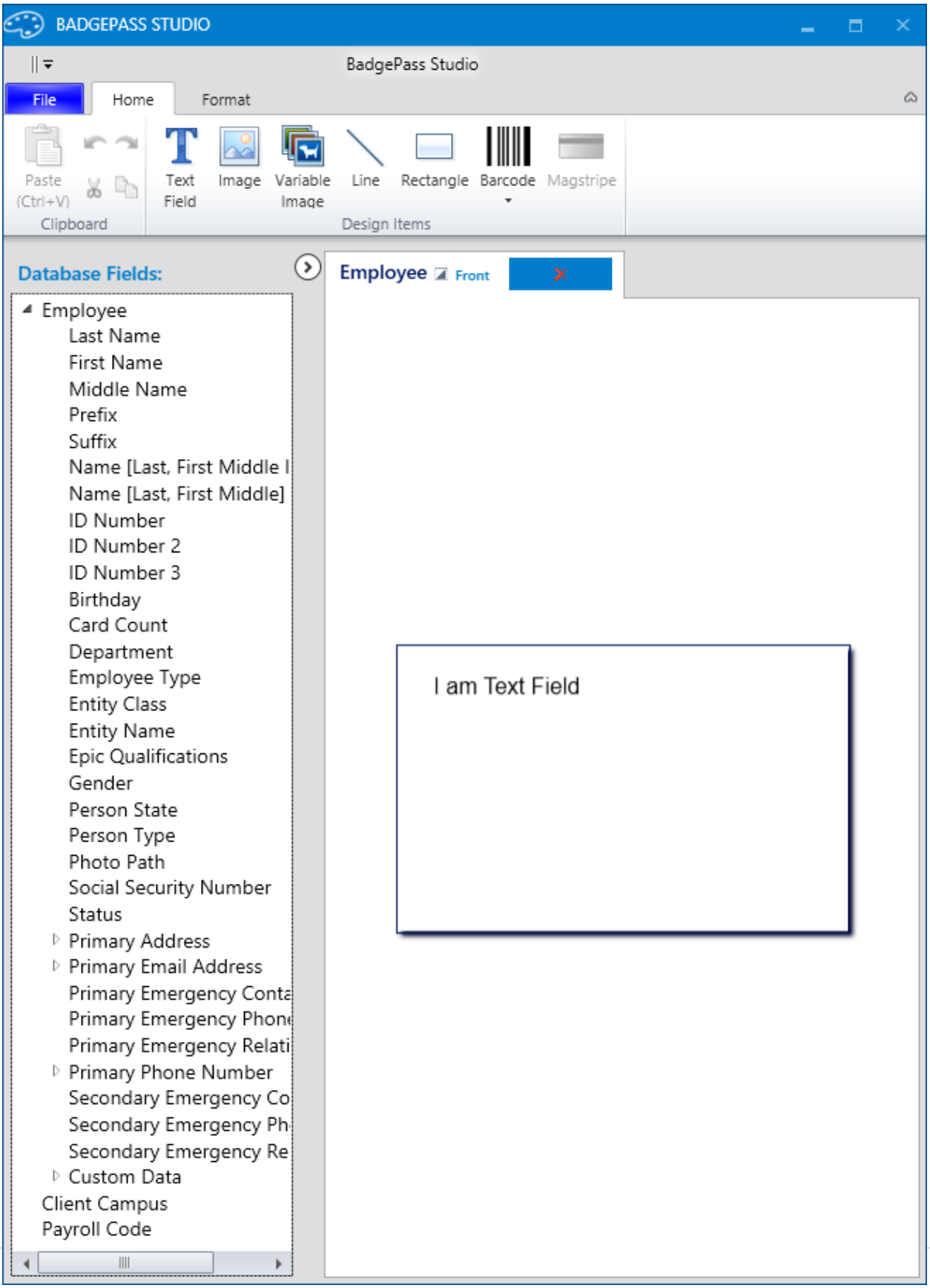
To import a badge design click on *Import* in the menu and navigate to the location of the xps file and click *Open*.



After editing the design, click on *Save* to save the changes to the file. Because this action will overwrite the file it is suggested that you make a backup of the original file, just in case you make an error or need to revert back in the future.

To import the database fields, click on *Import Db Fields* in the menu. Navigate to the location of the *BadgePass.bpe* file that was exported from the *BadgePass Management Console* and click *Open*.

Now when you create a badge design you will see the database fields:

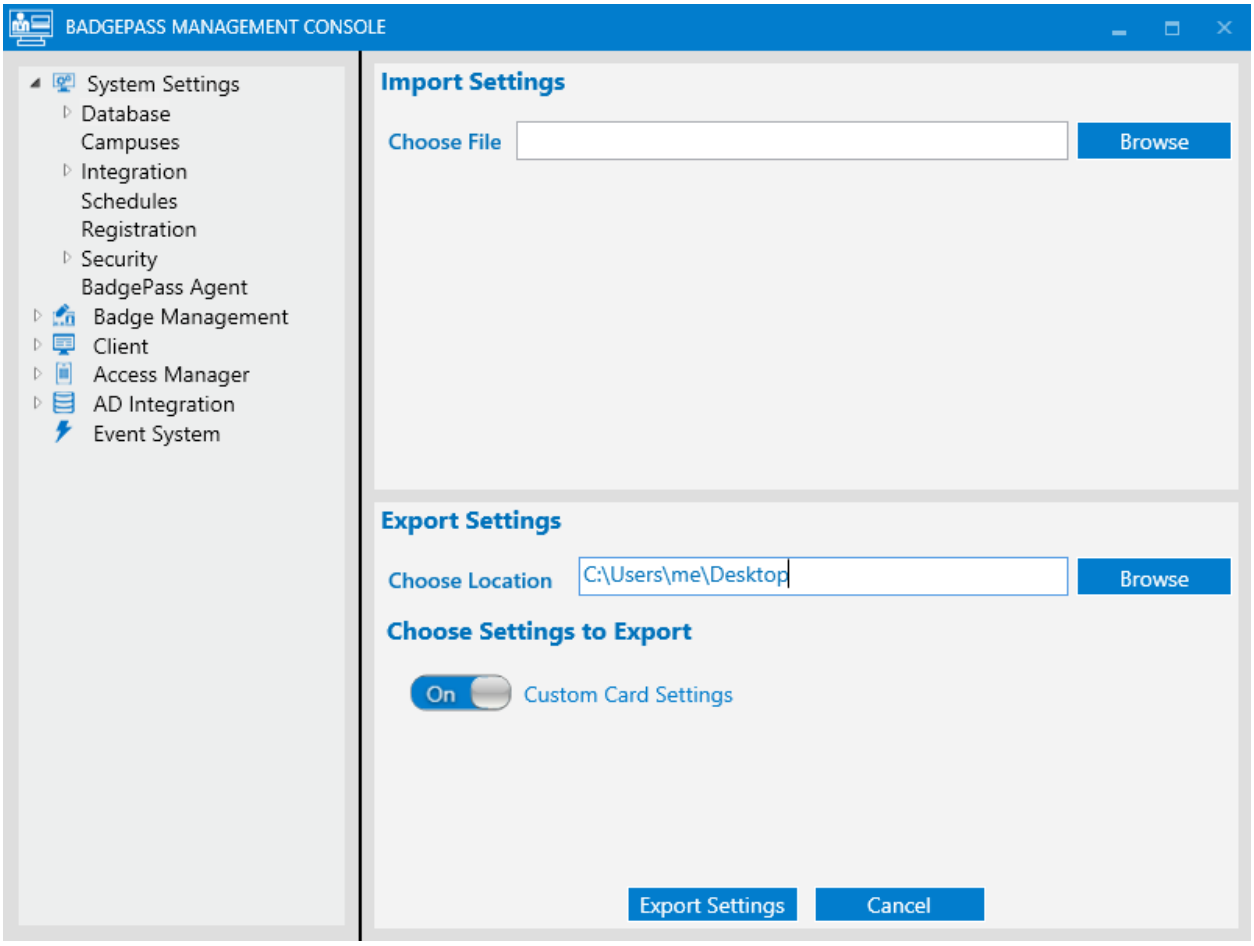

BADGEPASS STUDIO
BadgePass Studio
File
Home
Format
Paste (Ctrl+V)
Clipboard
Text Field
Image
Variable Image
Line
Rectangle
Barcode
Magstripe
Design Items
Database Fields:
Employee
Last Name
First Name
Middle Name
Prefix
Suffix
Name [Last, First Middle I
Name [Last, First Middle]
ID Number
ID Number 2
ID Number 3
Birthday
Card Count
Department
Employee Type
Entity Class
Entity Name
Epic Qualifications
Gender
Person State
Person Type
Photo Path
Social Security Number
Status
Primary Address
Primary Email Address
Primary Emergency Conta
Primary Emergency Phone
Primary Emergency Relati
Primary Phone Number
Secondary Emergency Co
Secondary Emergency Ph
Secondary Emergency Re
Custom Data
Client Campus
Payroll Code
Employee Front
I am Text Field

Appendices

Appendix A: Exporting Database Fields in Management Console for use in BadgePass Studio

To export the database fields from the Management Console for use with BadgePass Studio do the following:

- Open the Management Console and navigate to *BadgePass System -> Database*.
- Next, click on *Browse* button under *Export Settings* region and select a location to save the *BadgePass.bpe* file to.



- Once you have chosen all settings that you would like to export, click the *Export Settings* button