




## Welcome to BadgeCert!

You are only a few steps away from issuing and managing digital badges on the BadgeCert platform. Follow this step-by-step guide to begin recognizing your earners for their accomplishments. Check out the tooltips  in the BadgeCert application for more information.

# 1

## Create badge artwork in Badges

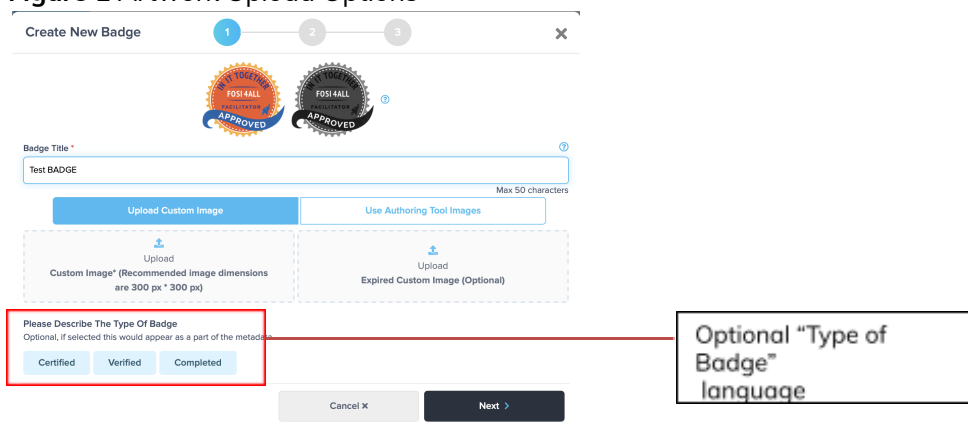
Start by creating the artwork as shown in Figure 1

There are three options to create your artwork:

- (1) upload your badge artwork and the system will automatically generate a gray version as the expired badge\*
- (2) upload your custom badge and custom expired badge artwork\*;
- (3) build a badge with our authoring tool.

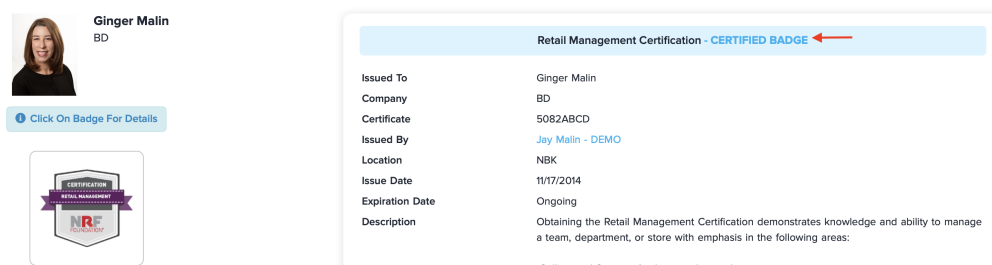
\* Note: If you are creating badges that will not expire, the expiration settings/options will not be a factor.

**Figure 1** Artwork Upload Options



After your artwork is uploaded, choose the optional “Type of Badge” language seen in Figure 1- (skip this step if adding this language is not desired). Certified, Verified or Completed can be added to the badge metadata header as seen in Figure 2. Typically, “Certified” is used for certifications, “Verified” is used for attendance and “Completed” is used for coursework.

**Figure 2** Type of badge optional language in badge metadata.





If you do not wish to show the expired badge image in the earner's portfolio upon expiration and would prefer to have badges removed, in Settings > Expiration select "Remove badges when expired" as shown in Figure 3. In other words, the badge(s) will be completely removed from the earner's portfolio upon expiration.

**Figure 3** Expiration Setting Workflow Option

**My Settings**

Profile | Authoring Tool | Roster and Issuance | **Expiration** | Social Media Sharing | QR Code

**Remove Badges When Expired** ⓘ

☒ Remove Expired Badges

**Show Badges When Expired** ⓘ

☐ Show Expired Badges

## 2

### Add badge description and add optional fields

Then add the metadata that will be displayed on the badge

Enter a description that will display earners' metadata as shown in Figure 4. You can add up to two optional custom fields that will populate on earners' badges. Note: all fields are English, however, earner metadata may be supplied in different languages.

**Figure 4** Add Badge Description and Optional Additional Metadata Fields

Create New Badge 1 2 3

THIS IS A TEST BADGE FOR DEMO PURPOSES...

**Add Badge Description Here**

**Add Custom Fields (Optional)** ⓘ

Custom Field 1 (Title) Max 23 characters Custom Field 1 (Body) Max 1000 characters

Custom Field 2 (Title) Max 23 characters Custom Field 2 (Body) Max 1000 characters

Optional Number Of Units Or Credits (Such As 2) Optional Label For Units Or Credits (Such As CE)

< Previous Next >

## 3

### Optional stackable credential/micro-credential

You can optionally level-up your badges

You have the option to create stackable credentials that can level-up to a micro-credential badge as shown in Figure 5. The options include leveling-up with points or with badges or rolling down with badges. Check out the tooltips ⓘ for more information.



**Figure 5** Optional Stackable/Leveled Badges

## 4

### Optional default certificates

#### Create a downloadable, printable certificate

Printed certificates are not as secure as a digital badge, but are oftentimes needed by earners. Once selected, you can add an optional QR code to the certificate to reference the digital badge. There are three options to create printable .pdf certificates.

(1) As shown in Figure 6, go to Badges > Click the badge > Click View Badge. Turn on Downloadable PDF to add an auto-generated .pdf certificate to the digital badge that can be downloaded and printed anytime

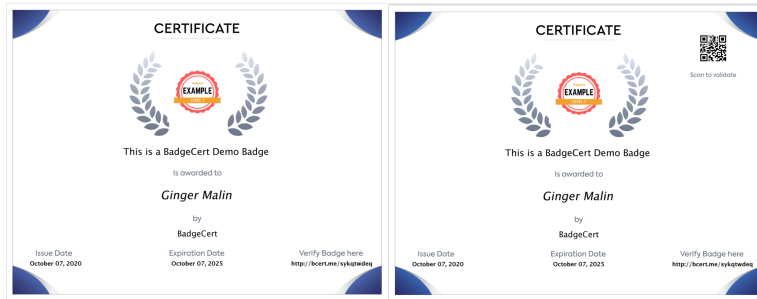
(2) Figure 7 shows the standard PDF certificate without and with the optional QR code. The QR code option is selectable in Settings > QR Code. The QR code, when scanned with the camera on common mobile devices, will link directly to the badge verification page or a custom URL that you submit to verify the accomplishment.

(3) If you wish to use your own custom certificate artwork instead of our default certificate, contact BadgeCert Sales. There is a nominal set-up cost for this custom certificate option. However, the standard default certificate can be added at no cost.

**Figure 6** Downloadable PDF Option and Single Badge Issuance Email Template



**Figure 7** Default certificates (without and with QR code)



## 5

### Set up your communication settings

**It is important to create the right workflow and messaging**

To customize your email earner notification templates and configure the timing they are sent out, visit Settings > Roster and Issuance tab as shown in Figure 8. You can select and configure the following email templates:

- (1) Optional Welcome email sent upon badge issuance that invites the earner to the platform. This will be sent simultaneously with the Issuance email. Many customers who do not want 2 emails going out to earners will turn this feature off.
- (2) Badge Issuance email sent upon issuance of a digital badge to an earner. You can set-up a universal template for all badge issuances as shown in Figure 8 or a single template for each badge as shown in Figure 9. The template will be pre-populated and can be edited/customized by adding wildcards and language appropriate for your stakeholders. This email can be in plain text or HTML.
- (3) Optional Expiration Reminder email before and upon expiration of a digital badge.
- (4) Issuance Reminder email to earners who may have forgotten to use their badge(s) and encourage them to do so. This email is very effective for encouraging all stakeholders to engage with their badges. If an individual has already clicked on their email and badge at least once, this email will automatically be suppressed.

You may use wildcards/flexible fields in all of the templates for personalizing messages. You can also create templates in HTML to further customize them. See the tooltips ⓘ for more information.



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Figure 8 Communication Management Dashboard

The dashboard is titled "My Settings" and has tabs for Profile, Authoring Tool, Roster and Issuance (selected), Expiration, Social Media Sharing, and QR Code. Under "Roster and Issuance", there are sections for Welcome Email, Badge Issuance, Update Issuance, Update Badge Emails, Badge Sharing, Group Sharing, Issuance Reminder, and Expiration Reminder. Each section has options for Mass Upload, UI, and Email Template, with toggle switches for "ON" and "OFF".

Figure 9 Badge Issuance Email Template for an Individual Badge  
Badges > Click on badge > Click View Badge Icon

The interface shows a "THIS IS A DEMO BADGE" header. Below it, there's a "View Badge" button and a "View Badge" icon. The badge itself is a circular seal with "FOSI HALL" and "APPROVED" text. To the right, there's a table with badge details: Badge ID (7227), Created Date (10/12/2020), Last Updated (10/12/2020), Issued To (0), Email Template (Create Template), and Downloadable PDF (OFF). Below the table, there's a "Badge Description" field with the text "THIS IS FOR DEMO PURPOSES...".

## 6

### Upload earner roster

#### Add earners and issue digital badges

You can upload earners to the system three ways:

- (1) Most popular: CSV file
- (2) Modern transactional application program interface (API), contact Sales for details
- (3) Manually, one-by-one on the portal (good for practicing the issuing of badges before you go "live")

For the CSV template file, visit:

<https://docs.google.com/spreadsheets/d/1UYM3ms2ogivgQuWIXN1WomAjrKNflery/edit?usp=sharing&oid=101893518480397118296&rtfpof=true&sd=true>

#### IMPORTANT!

Leave the header line with field titles on the CSV file when uploading the file.

Table 1 shows the roster fields required in the CSV file. Figure 10 shows where to find the auto-generated badge ID described in Table 1. The number in "badge1 ID" is used to designate which badge will be issued in the CSV file. If you want to issue multiple



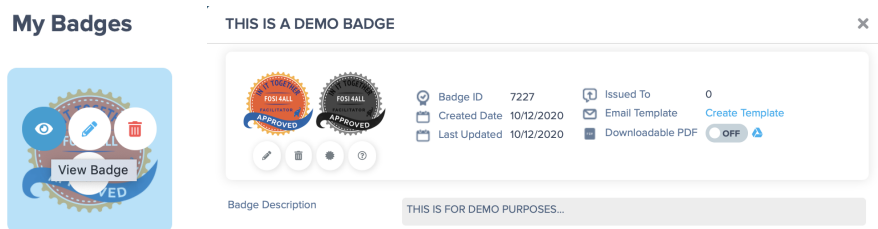
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badges to the same individual on the same CSV file, you should add additional rows with the same earner's information and change the BadgeID on each line. More information about .CSV file information in the CSV file FAQ's document found in the BadgeCert Knowledgebase.

**Table 1** Roster fields in the CSV file

Field name	Required	Example
First name	Yes	John
Last name	Yes	Doe
email	Yes	jdoe@badgcert.com
Phone country code	Yes, only if phone # is provided	1
Phone	No	312-555-5555
Phone extension	No	12
Mobile Country Code	No	+44
Mobile Number	No	312-555-5555
Company	No	BadgeCert Inc
Title	No	Benefits Manager
badge1 ID	Yes	1234 (See Figure 10 for where to locate ID)
issuedate-b1	Yes	1/1/2014 (This must be MM/DD/YYYY)
expDate-b1	No	01/01/2015 (This must be MM/DD/YYYY)
location-b1	No	Typically organization location, but can be "online" or earner location
issuerName-b1	No	CompanyX
issuerNotes-b1	No	John passed the final oral exam with 100%. (This information will not populate on badge metadata)
licenseName-b1	No	Wood Floor Recovery
licenseNumber-b1	No	01234567
IssuerReferenceLink	No	URL link that is displayed in the badge metadata under "Issuer Name" (Recommended)
artifact2-b1	No	http://fake.programdetails.com
artifact3-b1	No	http://fake.programdetails.com

**Figure 10** Where to find the auto-generated badge ID Information  
Badges > Click on badge > Click View Badge Icon



## Editing an Issued badge:

Once a badge is issued, it can be edited by the Issuer by hovering over the badge you want to edit and clicking on the edit symbol (pencil) on the badge in Badges. **Please note:** If a change/edit is made on a badge that has already been issued to earners, any changes/edits made will also impact the badges of individuals who have previously been



issued the badge. If you don't want badges that have already been issued to be updated with new information, please create a new badge and issue this new badge to earners.

## 7

### Manage your earners

#### Manage customer service requests

From Earners, you can perform the following:

- (1) Unlock earner accounts (they are locked after 10 login attempts- See lock icon in Figure 11);
- (2) Click the edit pencil to Resend email/badges to earners;
- (3) Click the edit pencil to Edit badge details;
- (4) Click the edit pencil to Delete badges.

You can also export a report about your earners that includes badge open rates and badge url links as shown in Figure 11.

**Figure 11** Manage earner accounts

**My Earners**

Upload File [?](#) Filters

Select Files... [Mass Upload Roster](#)

Select Badge Name [?](#) Issue Start Date [?](#) Issue End Date [?](#) Filter [?](#) Clear [x](#)

Filter By Expiration [?](#) Expiration Start Date [?](#) Expiration End Date [?](#) Export Files [?](#)

	First Name <a href="#">?</a>	Last Name <a href="#">?</a>	Email <a href="#">?</a>	Badges <a href="#">?</a>	Action
<input type="checkbox"/>	Divya	Buderia	sometomdikharry@yahoo.com	1	<a href="#">?</a> <a href="#">?</a> <a href="#">?</a>
<input type="checkbox"/>	BadgeCert	Demo	newuistest2@yahoo.com	3	<a href="#">?</a> <a href="#">?</a> <a href="#">?</a>
<input type="checkbox"/>	Tester Divya	Earner Divya	earnerTest-org71-2@yahoo.com	4	<a href="#">?</a> <a href="#">?</a> <a href="#">?</a>
<input type="checkbox"/>	Thomas	Martin	eamercsm@yahoo.com	4	<a href="#">?</a> <a href="#">?</a> <a href="#">?</a>
<input type="checkbox"/>	Earner-1	Org81	earner-1-org81@yahoo.com	2	<a href="#">?</a> <a href="#">?</a> <a href="#">?</a>
<input type="checkbox"/>	AGENTS11	TEST	bc156test5555@yahoo.com	1	<a href="#">?</a> <a href="#">?</a> <a href="#">?</a>
<input type="checkbox"/>	Earner1	Test1	SoNOTMeYan-org71@yahoo.com	3	<a href="#">?</a> <a href="#">?</a> <a href="#">?</a>
<input type="checkbox"/>	UPDATE	UPDATE	2-Earner-Org71@yahoo.com	1	<a href="#">?</a> <a href="#">?</a> <a href="#">?</a>

1 - 8 of 8 items

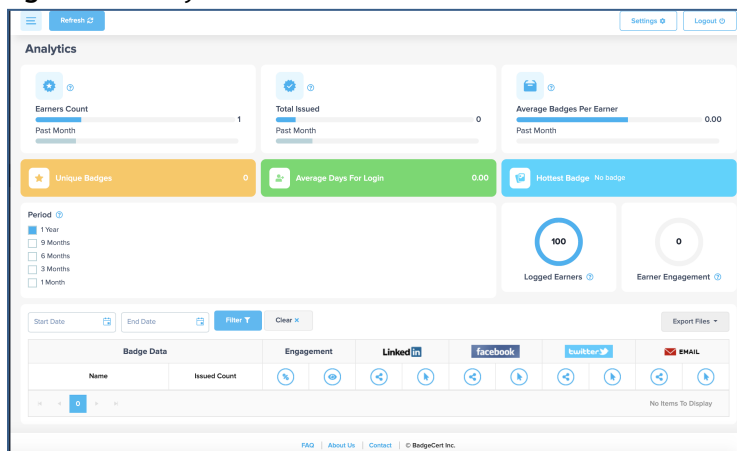
## 8

### Review your analytics

You can use data to learn more about how your credentials are seen in the world

Click on the tool tips [?](#) to understand the data that is presented.

**Figure 12** Analytics Dashboard





## 9

### Configure how email is sent (white label “From” address)

You must select the “from” address for emails sent on behalf of your organization such as: [badges@yourdomain.org](mailto:badges@yourdomain.org). This will likely improve email going into spam filters by integrating BadgeCert with your email server. If you prefer to use [no-reply@badgecert.com](mailto:no-reply@badgecert.com), please let our support team know at [support@badgecert.com](mailto:support@badgecert.com) and we can configure it for you.

To send the email from our server (typical) with your “from” address, we highly recommend that your IT Department “whitelist” our email server on your email domain server. This is straightforward and is described below.

Please share this with your IT Department:

Set up an SPF config and then add '**include:mailsender.badgecert.com**' to it.

The SPF would have a format like this:

```
"v=spf1 include:mailsender.badgecert.com ip4:YOURIP  
ip4:ANYIPTHEYUSETOSENDEMAIL -all"
```

Replace YOURIP with the IP of your server and you will need to add an ip4: for each IP you use to send out emails.

**\*\*NOTE:** Once this is completed, please validate it by following the directions below.

#### **Validate SPF Config is Correct**

To validate that the SPF config is correct, please use this SPF validation link <https://www.kitterman.com/spf/validate.html> and type in your domain (Figure 13). Then, click on 'Get SPF Record' button and confirm that the TXT validation has BadgeCert's mail server in it (Figure 14). For e.g. if the “from” email address is: "[CE@ACCP1.org](mailto:CE@ACCP1.org)" you will enter '[accp1.org](mailto:accp1.org)' (the domain will be the text after @ in your from email address) in the validation page.





Figure 13 SPF Validation Link

Figure14 Confirmation