

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 (7) in the BadgeCert application for more information.

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*; or
- (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.

gure 1 Artwork Upload	Options	
Create New Badge	3 X	
(Paraveo)	FOSHALL PPROVED	
adge Title *		
	Max 50 characters	
Upload Custom Image	Use Authoring Tool Images	
\$_ Upload Custom Image* (Recommended Image dimensions are 300 px * 300 px)	Upload Expired Custom Image (Optional)	
lease Describe The Type Of Badge ptional, if selected this would appear as a part of the metadoa Certified Verified Completed		Optional "Type of Badge"

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.

Ginger Malin BD		Retail Management Certification - CERTIFIED BADGE
	Issued To	Ginger Malin
Click On Badge For Details	Company Certificate	5082ABCD
	Issued By Location	Jay Malin - DEMO NBK
	Issue Date	11/17/2014
NRF	Expiration Date Description	Ongoing Obtaining the Retail Management Certification demonstrates knowledge and ability to manage a team, department, or store with emphasis in the following areas:
		Solling and Service: Analyzing sales goals





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 Settin	igs				
Profile	Authoring Tool	Roster and Issuance	Expiration	Social Media Sharing	QR Code
Remove Badge	s When Expired ⑦	Show Badges	When Expired ⑦		

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

reate New Badge	2		×
	Poroved		G
B I ∐ abc 1⊟ 1⊟ 5≣ 69			
HIS IS A TEST BADGE FOR DEMO PURPOSES			
Add Badae	e Descript	ion Here	
Add Custom Fields (Optional) 🛞			
Add Custom Fields (Optional) (9 Custom Field 1 (Title)	Custom Field 1 (Bod	y)	
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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 (7) for more information.



Figure 5 Optional Stackable/Leveled Badges





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)



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:

- 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 (7) for more information.



Figure 8 Communication Management Dashboard

My Setting	js							
Profile	Authoring	Tool Ros	ster and Issuance	E	Expiration	Social Media Sh	aring	QR Code
Welcome Ema	ail ?		🌞 Badge Issuance	?		📿 Update I	ssuance ?	
Mass Upload		Email Template	Mass Upload		Email Template	Mass Uploa	d ∪I	Email Template
🔁 Update Badg	e Emails ③		Badge Sharing	?		Group Sh	aring ?	
Mass Upload	UI E	Email Template	Mass Upload	UI	Email Template	Mass Uploa	d UI	Email Template
🜲 Issuance Rem	inder				Expiration Remi	nder 🕜		
7 Days	14 Days	30 Days	Email Template		1 Day	7 Days	30 Days	Email Template
			(1)(2)(2)(3)(4)(4)(5)(4)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(4)(5)(5)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)(6)<l< th=""><th></th><th></th><th></th><th></th><th>B</th></l<>					B

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

My Badges	THIS IS A DEMO BADGE		×
View Badge	rssull Annover A B C O	⊘ Badge ID 7227 Created Date 10/12/2020 Created Date 10/12/2020 Last Updated 10/12/2020	
A A A A A A A A A A A A A A A A A A A	Badge Description	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&ouid=101893518480397118296&rtpof=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





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.

Field name	Required	Example
First name	Yes	John
Last name	Yes	Doe
email	Yes	jdoe@badgecert.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

Table 1 Roster fields in the CSV file

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.

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

rners								
File 🕐	Filters							
Select Files	Select Badge Name	Issue	e Start Date		Issue End Date	ti i	Filter T	Clear ×
Mass Upload Roster	Filter By Expiration	Expi	ration Start Date		Expiration End Date			
								Export Files
First Name 🗢	Last Name 🗘				Email 🖨		Badges 🖨	Action
	y	Ţ				_		-
Divya	Buderia		sometomdikandha	irry@yo	pmail.com		1	
BadgeCert	Demo		newuitest21@yopn	nail.con	1		3	1
Tester Divya	Earner Divya		eamerTest-org71-2	eyopm	ail.com		4	-
Thomas	Martin		eamercsm@yopma	ail.com			4	
Earner-1	Org81		eamer-1-org81@yo	pmail.c	om		2	1
AGENT511 -	TEST		bc1561test555558	Pyopma	il.com		1	1
Earner1	Test1		SoNOTMeYaar-org	71@yop	mail.com		3	1
LIPDATE	LIPDATE		2-Earnor-Oro71/bu	oomail	.om		1	1



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

E Refresh Ø						Settings 0	Logout ()
Analytics							
© © Earners Count Past Month	Total Issued		0	Average B Past Mont) Badges Per Eamer h		0.00
🗶 Unique Badges 🛛 0	Average Days F		0.00	😰 Hott			
Period ① Year Year GMonts GMonts JMonts JMonts IMonts Units				Logged	Earners 3	0 Earner Engag	ement 3
Start Date 🛱 End Date 🛱 Filter Y	Clear ×					Exp	ort Files *
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Name Issued Count	۰	 Image: Image: Ima	۲	\bigcirc	 Image: Image: Ima	٢	€
и ч о н						No Items To	Display
	FAQ About Up	Contact © BadgeCert	inc.				



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. This will likely improve email going into spam filters by integrating BadgeCert with your email server. If you prefer to use <u>no-reply@badgecert.com</u>, please let our support team know at <u>support@badgecert.com</u> 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 <u>https://www.kitterman.com/spf/validate.html</u> 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: "<u>CE@ACCP1.org</u>" you will enter 'accp1.org' (the domain will be the text after @ in your from email address) in the validation page.



Figure 13 SPF Validation Link

G Gmail ▲ Resolved Reported ▲ Atlassian OnDemand ● Technical ● Reach ● BadgeCert ● VGS SPF Record Testing Tools Home About Site Cverview These tools are meant to help you deploy SPF records for your domain. They use an actual RFC 7208 compliant library (pyspf) for tests and will dynamically test for processing limit errors (no testers I'm aware of do this). This site uses a caching DNS resolver, so for tests that use live DNS, results will be cached for the Time To Live of the DNS record. For most basic uses, these should be reasonably self explanatory. Advanced users may need, and probabily want, some additional information on how these tools work. It can be found here. Dees my domain already have an SPF record? What is it? Is it valid?
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Does my domain already have an SPF record? What is it? Is it valid?
Retrieves SPF records for the specified domain name and determines if the record is valid.
Domain name: lacop1.org
Get SPF Record (if any)
NOTE: The domain is everything to the right of the '@' in the e-mail address.
Is this SPF record valid - syntactically correct?
Tests the supplied SPF record to see if it is valid. This test does NOT look up the record for the supplied domain. It only tests the validity of the supplied record. This test is for checking the synt records before you publish them. The domain is used only for mechanisms such as a bare 'a' mechanism that have an implied domain. It will also be used for the %d macro if present.
Domain:
SPF Record:
Check SPF record Reset Form
Notes: Do not enclose in quotes. Input something like v≕spf1 a mx ∼all. Except for %d, does not currently support records that include macros.
Test an SPF record
This test is for evaluating the performance of your record based on different IP addresses that mail might come from (this is the IP address of the mail server). It can also be used for syntax che

Figure14 Confirmation

SPF record lookup and validation for accp1.org

SPF records are published in DNS as TXT records.

The TXT records found for your domain are: v=spf1 ip4:52.191.236.182 v=spf1 include:spf.protection.outlook.com include:mailsender.badgecert.com -all

Checking to see if there is a valid SPF record.

Found v=spf1 record for accp1.org:

v=spf1 ip4:52.191.236.182 v=spf1 include:spf.protection.outlook.com include:mailsender.badgecert.com -all

evaluating..

SPF record passed validation test with pySPF (Python SPF library)!

Return to SPF checking tool (clears form)

Use the back button on your browser to return to the SPF checking tool without clearing the form.