



## 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 My Badges

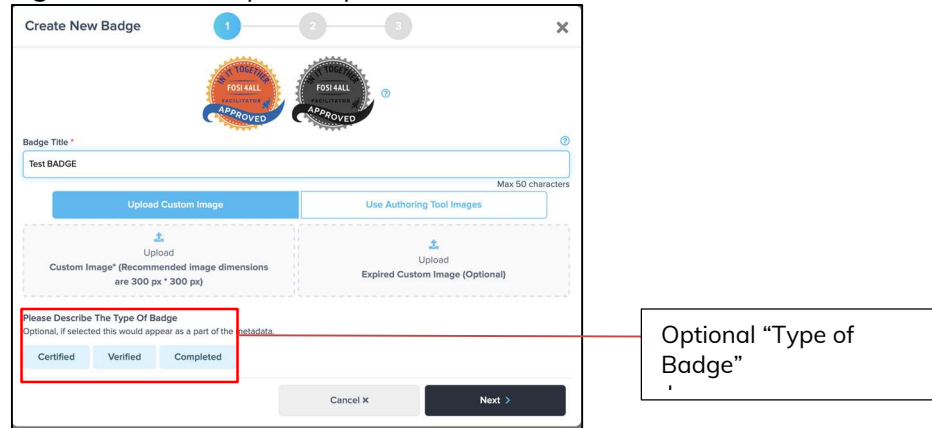
Start by creating the artwork as shown in Figure 1

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.

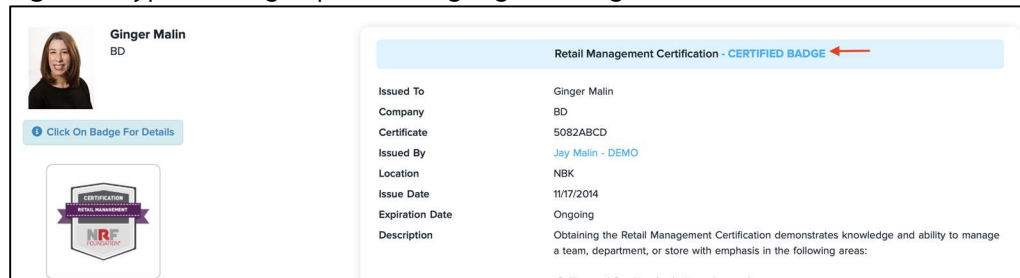
\* Note: If you are creating badges that will not expire, the expiration settings/options will not be a factor.

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.

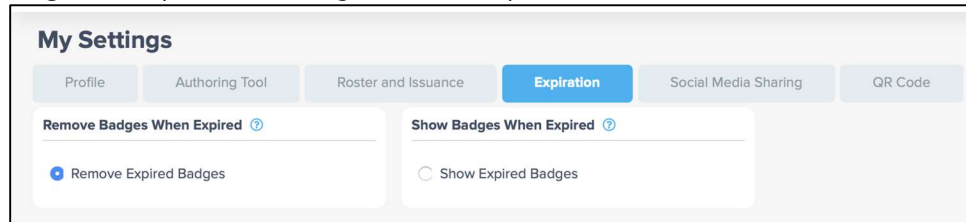
Figure 2 Type of badge optional language in badge metadata.





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 My 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



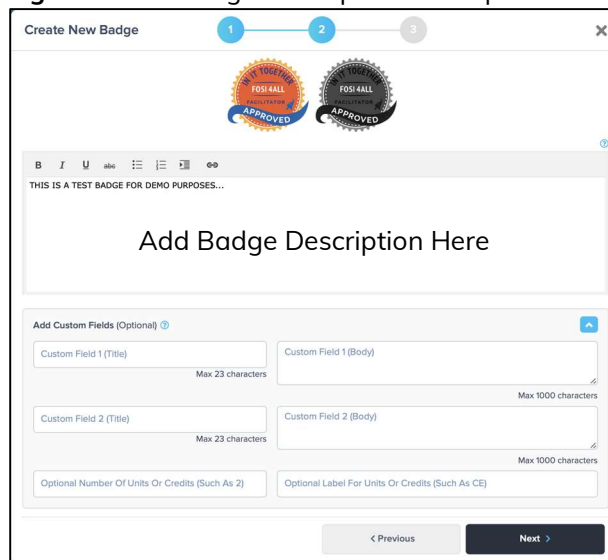
## 2

### 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





## 3

### Optional stackable credential/micro-credential

You can optionally level-up your badges


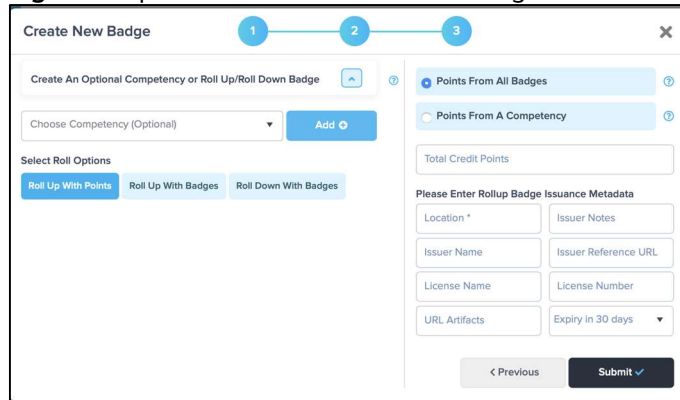
You have the option to create stackable credentials that can level-up to a micro-credential badge as shown in Figure 5. The options include leveling-up with points or with badges or rolling down with badges. Check out the tooltips  for more information.

Figure 5 Optional Stackable/Leveled Badges



The screenshot shows the 'Create New Badge' interface. At the top, there are three numbered steps: 1, 2, and 3. Step 1 is active. The main form has a section titled 'Create An Optional Competency or Roll Up/Roll Down Badge'. Below this, there is a dropdown menu for 'Choose Competency (Optional)' and an 'Add' button. Underneath, there are three buttons for 'Select Roll Options': 'Roll Up With Points', 'Roll Up With Badges', and 'Roll Down With Badges'. To the right, there are two radio button options: 'Points From All Badges' (selected) and 'Points From A Competency'. Below these is a 'Total Credit Points' input field. Further down, there is a section for 'Please Enter Rollup Badge Issuance Metadata' with fields for 'Location \*', 'Issuer Notes', 'Issuer Name', 'Issuer Reference URL', 'License Name', 'License Number', 'URL Artifacts', and 'Expiry in 30 days'. At the bottom, there are '< Previous' and 'Submit ✓' buttons.

## 4

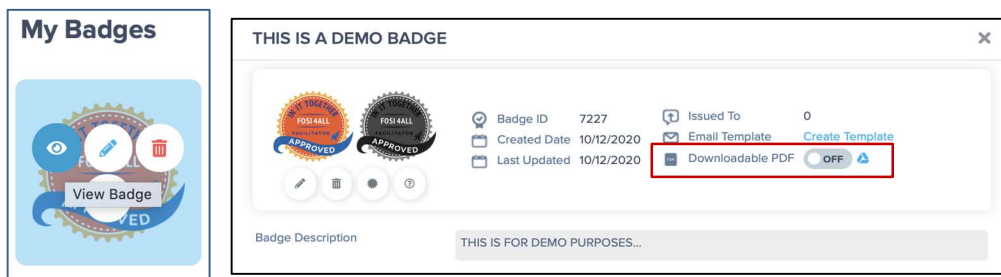
### Optional default certificates

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.

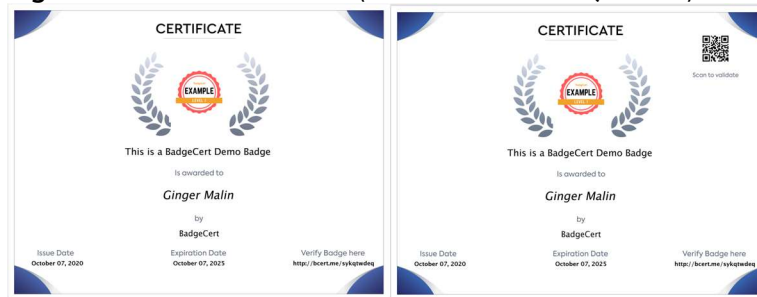
- (1) As shown in Figure 6, go to My Badges > Click the badge > Click View Badge. Turn on Downloadable PDF to add an auto-generated .pdf certificate to the digital badge that can be downloaded and printed anytime.
- (2) Figure 7 shows the standard PDF certificate without and with the optional QR code. The QR code option is selectable in My 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, 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

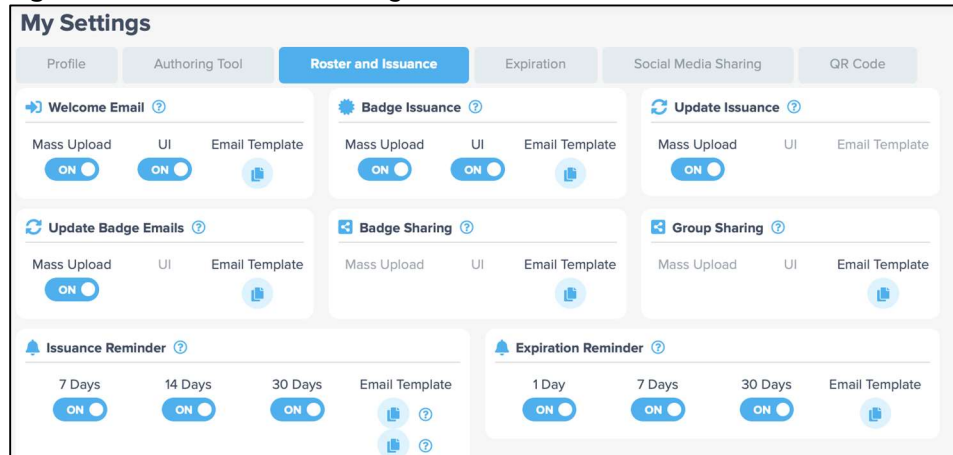
To customize your email earner notification templates and configure the timing they are sent out, visit My Settings > Roster and Issuance tab as shown in Figure 8. You can select and configure the following email templates:

- (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 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.

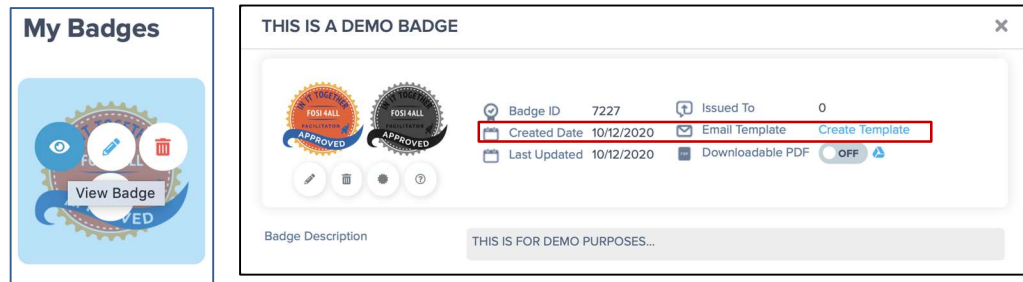
You may use wildcards/flexible fields in all of the templates for personalized messages. You can also create templates in HTML to further customize them. See the tooltips  for more information.



**Figure 8** Communication Management Dashboard



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



## 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) ReST API, contact Sales for details
- (3) Manually, one-by-one on the portal (good for testing digital badge issuances prior to “Go “live”)

For the CSV template file, visit:

[https://docs.google.com/spreadsheets/d/1XKzJ7qywXqChHl4dTgx\\_x1KOHl3cBRzrefp4aF118uA/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1XKzJ7qywXqChHl4dTgx_x1KOHl3cBRzrefp4aF118uA/edit?usp=sharing)

**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 uploads is found in the CSV file FAQ’s document.

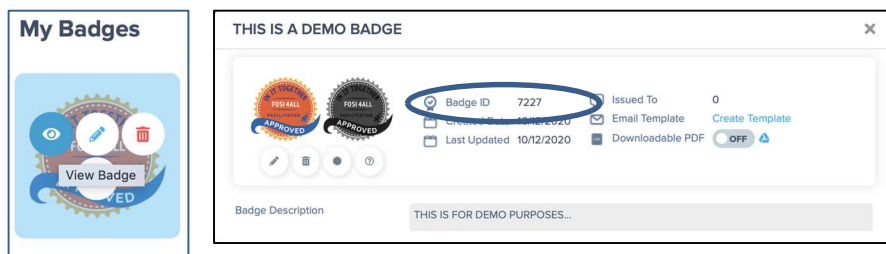


## 6

**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  
My Badges > Click on badge > Click View Badge Icon



### Editing an issued badge

Once a badge is issued, it cannot be edited by the Issuer. BadgeCert can always edit an issued badge (icons or metadata) from the back-end if needed by contacting support@badgcert.com. However, for testing purposes, editing privileges can be restored by going to My Earners > Filter for Badge Name > Click on the individual who received the badge > Click the edit button (pencil) > Click delete the issuance (trash can). Once you have done this, you will be able to edit your badge again.



## 7

### Manage your earners

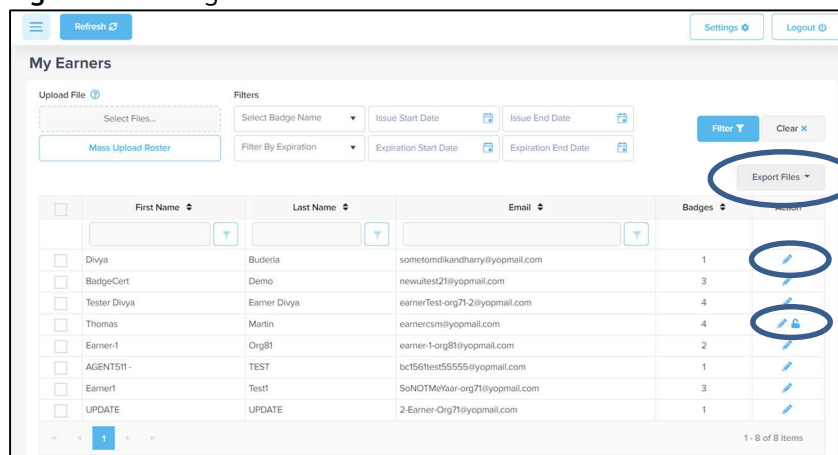
#### Manage customer service requests

From My 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



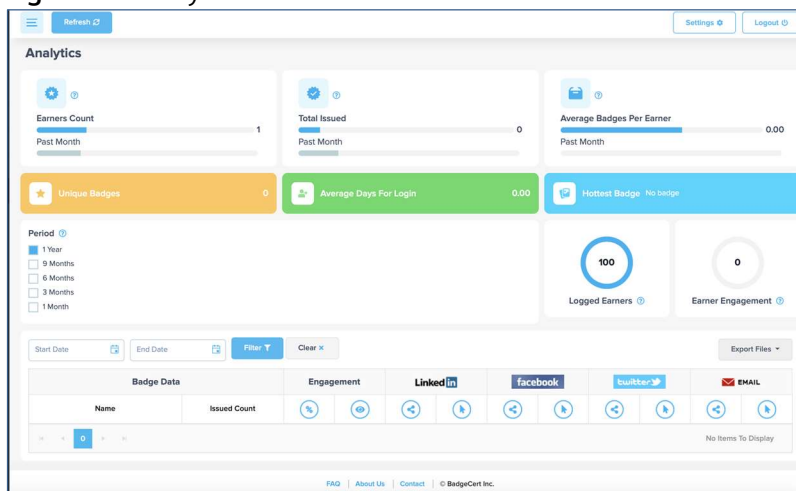
## 8

### 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 should 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. Otherwise, by default, `no-reply@badgcert.com` will be used.

If you want BadgeCert 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.badgcert.com**' to it.

The SPF would have a format like this:

```
"v=spf1 include:mailsender.badgcert.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 send BadgeCert an email at `support@badgcert.com` with your SPF configuration information.