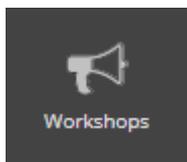




Workshops



In this section you can create as many different **Badges** and **Certificates** you need for your **Employees** whom will be tracked at the **Training Courses**. And for convenience with our mobile **AccuTraining** app we even have a **QR Labels** section to make scanning with your mobile devices camera a breeze.

Badges

The **Badges** section is a really great tool to generate professional looking badges that can be used to scan **Employees** in and out of **Training Courses** using either a barcode reader/PC or the **AccuTraining** app's built-in camera functions available in the Apple Store.

Badge Templates



This section allows you to create completely custom badges using either our templates or your own imagination. Now you can even create a different design for different **Employee Groups**!

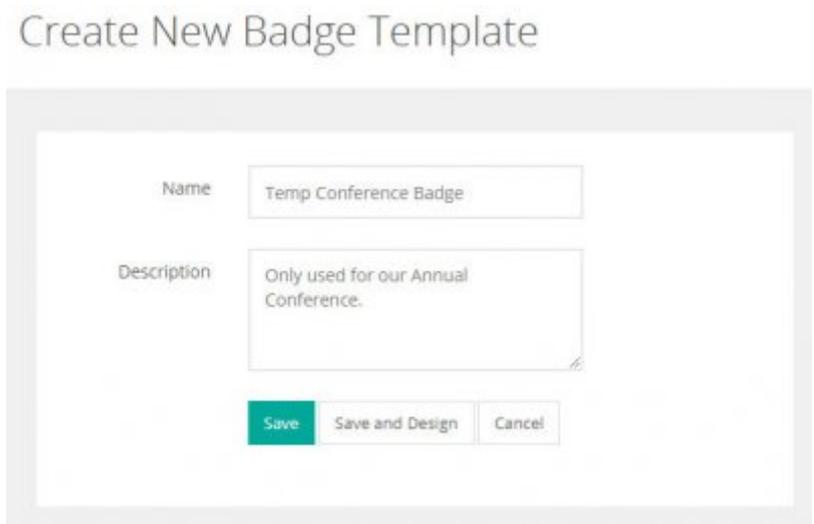
Badges Templates



Create Badge Template

To get started simply click the **Create Badge Template** button at the top of the **Badge Templates** screen. Then complete the following steps:

1. Give the **Badge Template** a **Name** that will show up when seeing them in the **Badge Template** list.
2. Give the **Badge Template** a brief **Description** of the group of Employees this badge is designed for so you will know when seeing them in the **Badge Template** screen.
3. Now either **Save** this information only by clicking the **Save** button OR **Save and Design** this template by clicking the **Save and Design** button. [Now please skip to the Design heading for more.](#)



Modify Badge Template

To edit a **Badge Template** simply click the blue highlighted title of the **Badge Template**. Here you'll be able to rename and/or change the description.

Delete Badge Template

Simply click the **Delete** link on the far right-side of the Badge Template while viewing the list of Badge Templates and confirm the deletion on the popup window.

More Options

Notice on the right-side of each badge template you have the ability to do the following:

- **Design** - This brings up the Design screen.
- **Print** - This brings up the Print Options screen.
- **Email** - This brings up the Email Options screen.
- **Delete** - This allows you to delete this **Badge Template**.

Design

This is where you can fully customize your Users badges or just choose from several preset templates.

Design Your Template

Design Badge

\$Event\$

\$FullName\$

\$Account\$





0123456789

Save
Cancel
From Template

Keywords

Keywords: You can use the following keywords in any text box:
 All users
 \$FullName\$: John Richard Doe
 \$FirstName\$: John
 \$MiddleName\$: Richard
 \$LastName\$: Doe
 \$Email\$: john@test.com
 \$Account\$: Best Account Ever
 \$Date\$: 11/24/2014

Toolbox

Toolbox

Add Text

Add Image

Add Barcode

Select Control

Canvas ▾

Canvas Properties

Background Color

#ffffff

Background Image

[\[Change\]](#)

On this screen you can design the badges for your Users. Using the following sections:

Toolbox

- **Add Text:** Create a box where you can enter text.
- **Add Image:** To add images to canvas the certificate.
- **Add Barcode:** This allows you to add either QR or 39 barcodes to your badges.
- **Select Control** This is used to select a part of the badge you want to edit. A dropdown list shows all the elements that make up your badge.
- **Canvas Properties**
 - **Background Color:** Select the color you want your background. Click on the white box, and it will display a picture with all the colors you can change it.
 - **Background Image**
 - **View Image:** It will open a new window showing the image of the badge created.
 - **Change:** You can upload an image that resides on your computer.
 - **None:** Removes any background image upload.

Keywords

You can use the following keywords in any text box:

All Users Info:

- **\$FullName\$** Displays the full name of the User.
- **\$FirstName\$**: Displays the first name of the User.
- **\$MiddleName\$**: Displays the middle name of the User.
- **\$LastName\$**: Displays the last name of the User.
- **\$Email\$**: Displays the email of the User.
- **\$Account\$** Displays the name of the Account.
- **\$Date\$** Displays the date of the Training.

Users with attendance

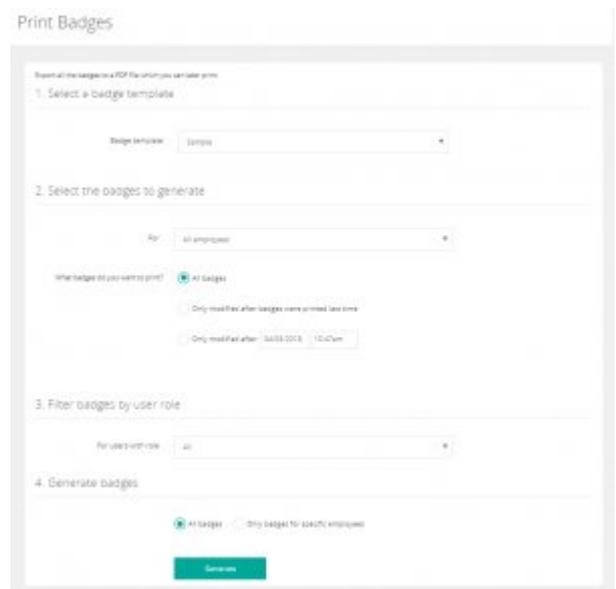
- **\$Events\$**: This displays the **Training Courses** the Employee is registered to.

Print Badges



This section allows you to print your **Badges** you have designed in the **AccuTraining** software. You have many options as far as what **User Role**, which **Badge Template**, and even for only certain individuals or all of the **Users** that you want to print the **Badges**.

As an **Administrator**, you may want to directly download the **Badges** to print out and then hand out to the **Employees**.



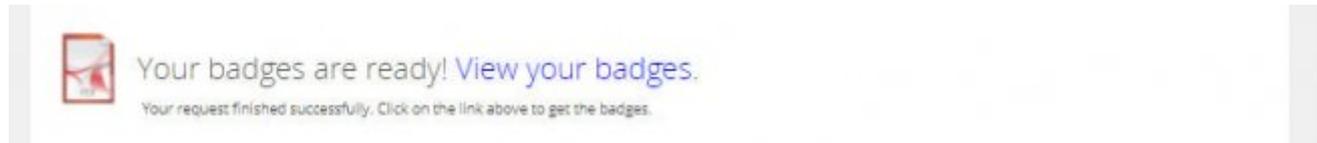
The screenshot shows the 'Print Badges' interface with the following steps and options:

- 1. Select a badge template:** A dropdown menu for 'Badge template' is set to 'Default'.
- 2. Select the badges to generate:** A dropdown menu for 'For' is set to 'all employees'. Below it, there are three radio button options for 'What badges do you want to print?':
 - All badges
 - Only modified after badges were printed last time
 - Only modified after: (MM/DD/YYYY H:MM AM/PM)
- 3. Filter badges by user role:** A dropdown menu for 'For users with role' is set to 'all'.
- 4. Generate badges:** Two radio button options are present:
 - All badges
 - Only badge for specific employeesA green 'Generate' button is at the bottom.

1. First select a **Badge Template**.
2. Select whether to print the **Badges** for all or those only with attendance.
3. Now set what **Badges** you want to print.
 - **All badges**
 - **Only modified after badges were printed last time**
 - **Only modified after: (MM/DD/YYYY H:MM AM/PM)**

4. Now filter based on the **User Role**. This can either be a default **User Role** (Admin, Operator, or Employee) or a custom **User Role** you created. [More info about custom User Roles here.](#)
5. Now select whether to print only individual **Badges** or all **Badges** and then click the **Generate** button. Wait until **AccuTraining** generates your Badges and the bottom section of the screen shows the message **Your badges are ready, click on View badges to download.**

A confirmation screen will show at the bottom of the screen and click the **View Badges** to print them out.



The Avery part number for badges that you need is #5392 and uses template number #74541. They are 3" x 4" badge inserts (6 to a page) and can be found at Avery.com by [clicking here](#) or at retailers carrying Avery products.

Email Badges



Now you can even **Email** the **Badges** out to your **Employees** so they can have them printed and ready to go when they arrive for training! This allows you to easily email all the badges in PDF format to the users.

As this is intended for emailing the **Badges**, each one is placed in a different file. If you want all the badges in a single file, use the **Print Badges** option instead. In both cases, depending on the size of your account, it might take several minutes to complete.

Once the badges are generated, you will be able to review the badges before sending them. Here is what steps you do in order to generate the emails:

Email Badges

This allows you to easily email all the badges in PDF format to the users.

As this is intended for emailing the badges, each one is placed in a different file. If you want all the badges in a single file, use the [print badges](#) option instead. In both cases, depending on the size of your account, it might take several minutes to complete.

Once the badges are generated, you will be able to review the badges before sending them.

1. Select a badge template

Badge template

2. Select the badges to generate

For

What badges do you want to print?

All badges
 Only modified after badges were printed last time
 Only modified after:

3. Filter badges by user role

For users with role

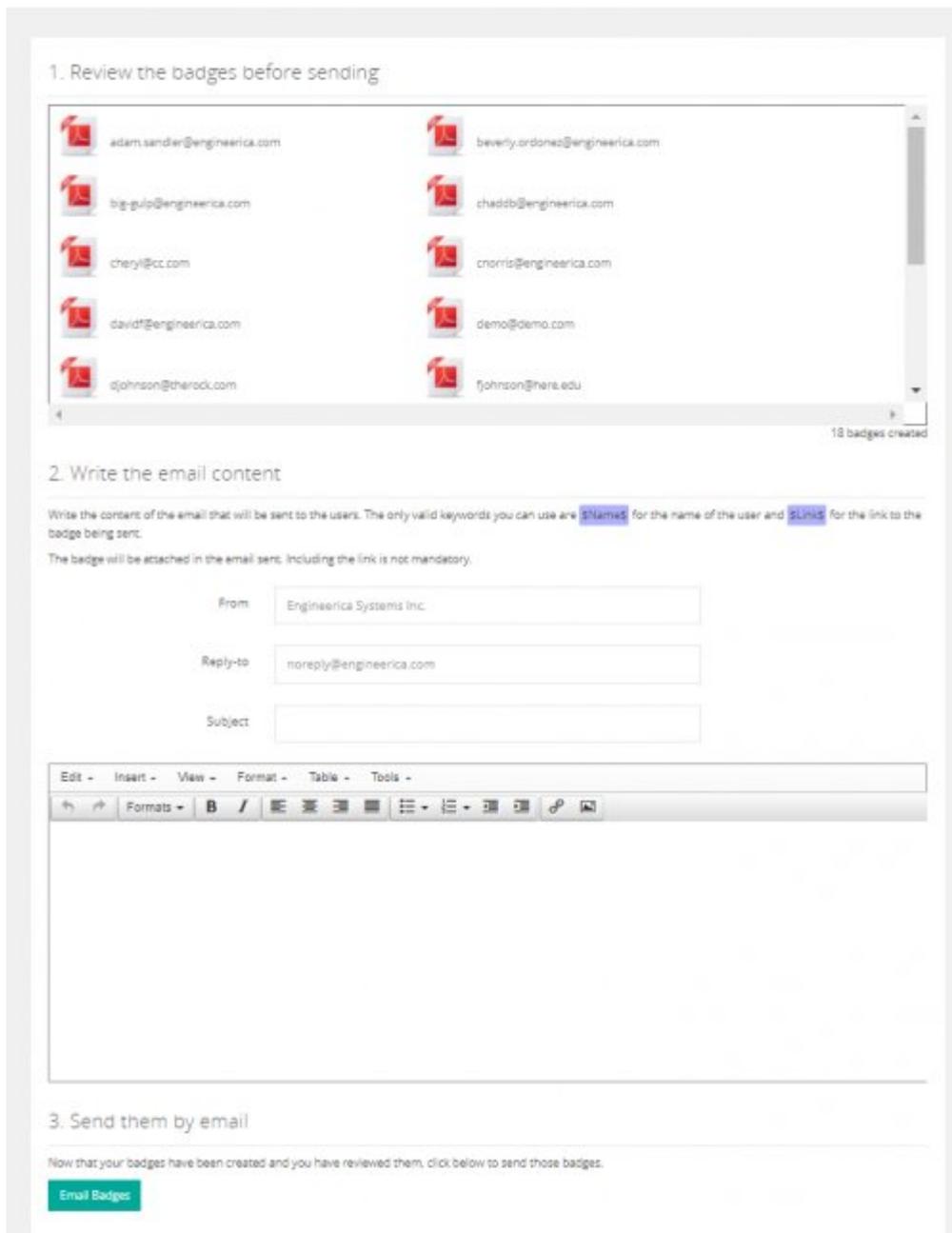
4. Email badges

All badges Only badges for a specific user

1. Select a badge template from the list of badges you designed.
2. Select the group of **Employees** the badges are to be emailed.
 - **All Employees**

- **Only Employees with Attendance**
- 3. Set what badges do you want to email?
 - **All badges**
 - **Only modified after:**
- 4. Filter badges by user role - Set this for users with a particular **User Role**
- 5. Now choose to **Email badges** for all or specific user(s).
 - **All badges**
 - **Only badges for specific user(s)**
- 6. Click the **Email** button to review the badges.

Review and Send



- 7. Finally after reviewing and writing the email message to be sent click the **Email Badges** button.

Certificates

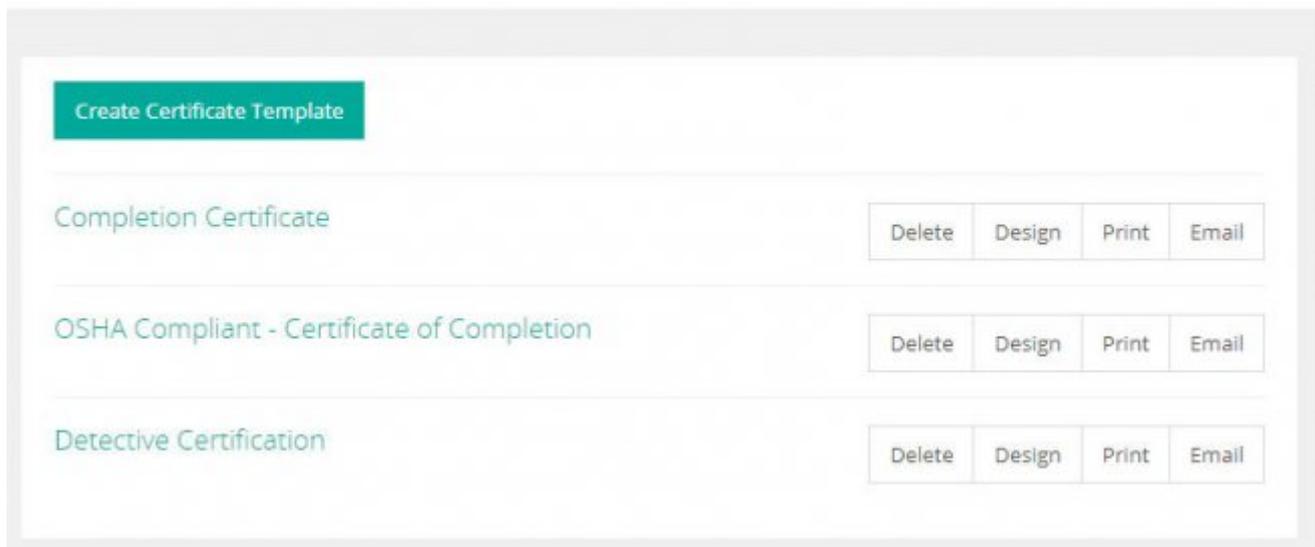
The **Certificates** section is a really great tool to generate professional looking Certificates that can printed or sent to **Employees** who complete **Training Courses** and/or **Training Plans**. Since you can completely customize as many Certificates as you want these can be customized for different completion levels or types.

Certificate Templates



This section allows you to create completely custom Certificates using either our templates or your own imagination. Now you can even create a different design for different completion levels and/or types!

Certificates Templates



Create Certificate Template

To get started simply click the **Create Certificate Template** button at the top of the **Certificate Templates** screen. Then complete the following steps:

1. Give the **Certificate Template** a **Name** that will show up when seeing them in the **Certificate Template** list.
2. Give the **Certificate Template** a brief **Description** of the group of Employees or reason this Certificate is designed for so you will know when seeing them in the **Certificate Template** screen.
3. Now either **Save** this information only by clicking the **Save** button OR **Save and Design** this template by clicking the **Save and Design** button. [Now please skip to the Design heading for more.](#)

Modify Certificate Template

To edit a **Certificate Template** simply click the blue highlighted title of the **Certificate Template**. Here you'll be able to rename and/or change the description.

Delete Certificate Template

Simply click the **Delete** link on the far right-side of the Certificate Template while viewing the list of Certificate Templates and confirm the deletion on the popup window.

More Options

Notice on the right-side of each Certificate template you have the ability to do the following:

- **Design** - This brings up the Design screen.
- **Print** - This brings up the Print Options screen.
- **Email** - This brings up the Email Options screen.
- **Delete** - This allows you to delete this **Certificate Template**.

Design

This is where you can fully customize your Users Certificates or just choose from several preset templates.

The screenshot displays the 'Design Certificate' interface. The main area shows a 'Certificate of Attendance' form with fields for '\$FullName\$', '\$Account\$', and '\$Date\$'. The form includes the Engenerica logo and an 'Authorized Signature' field. On the right, there is a 'Keywords' section with a list of keywords and a 'Toolbox' section with buttons for 'Add Text', 'Add Image', and 'Add Barcode', along with a 'Select Control' dropdown and 'Canvas Properties'.

On this screen you can design the Certificates for your Users. Using the following sections:

Toolbox

- **Add Text:** Create a box where you can enter text.
- **Add Image:** To add images to canvas the certificate.
- **Add Barcode:** This allows you to add either QR or 39 barcodes to your Certificates.
- **Select Control** This is used to select a part of the Certificate you want to edit. A dropdown list shows all the elements that make up your Certificate.
- **Canvas Properties**
 - **Background Color:** Select the color you want your background. Click on the white box, and it will display a picture with all the colors you can change it.
 - **Background Image**
 - **View Image:** It will open a new window showing the image of the Certificate created.
 - **Change:** You can upload an image that resides on your computer.
 - **None:** Removes any background image upload.

Keywords

You can use the following keywords in any text box:

All Users Info:

- **\$FullName\$** Displays the full name of the User.
- **\$FirstName\$:** Displays the first name of the User.
- **\$MiddleName\$:** Displays the middle name of the User.
- **\$LastName\$:** Displays the last name of the User.
- **\$Email\$:** Displays the email of the User.
- **\$Account\$** Displays the name of the Account.
- **\$Date\$** Displays the date of the Training.

Users with attendance

- **\$Events\$:** This displays the **Training Courses** the Employee is registered to.

Print Certificates



This section allows you to print your **Certificates** you have designed in the **AccuTraining** software. As well you have many options as far who you want to print the **Certificates** for in this section.

Export all the certificates to a PDF file which you can later print.

As this is intended for printing or just making a backup of the certificates, all of them are created in a single file. If you want each certificate in its own file, use the **Print Certificates** option instead. In both cases, depending on the size of your account, it might take several minutes to complete.

1. Select a certificate template

Certificate template:

2. Select the certificates to generate

For:

3. Filter certificates by user role

For users with role:

4. Generate certificates

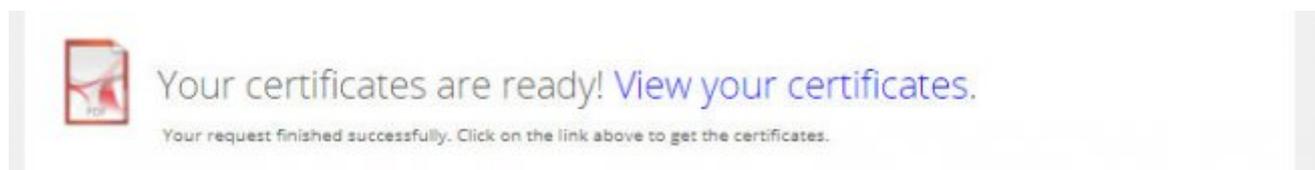
All certificates Only certificates for specific users

This section allows you to print your **Certificates** you have designed in the **AccuTraining** software. You have many options as far as what **User Role**, which **Certificate Template**, and even for only certain individuals or all of the **Users** that you want to print the **Certificates**.

As an **Administrator**, you may want to directly download the **Certificates** to print out and then hand out to the **Employees**.

1. First select a **Certificate Template**.
2. Select whether to print the **Certificates** for all or those only with attendance.
3. Now set what **Certificates** you want to print.
 - o **All Certificates**
 - o **Only modified after Certificates were printed last time**
 - o **Only modified after: (MM/DD/YYYY H:MM AM/PM)**
4. Now filter based on the **User Role**. This can either be a default **User Role** (Admin, Operator, or Employee) or a custom **User Role** you created. [More info about custom User Roles here.](#)
5. Now select whether to print only individual **Certificates** or all **Certificates** and then click the **Generate** button. Wait until **AccuTraining** generates your Certificates and the bottom section of the screen shows the message **Your Certificates are ready, click on View Certificates to download.**

A confirmation screen will show at the bottom of the screen and click the **View Certificates** to print them out.



Email Certificates

Now you can even **Email** the **Certificates** out to your **Employees** so they store these electronically if needed and/or print them for their wall!

As this is intended for emailing the **Certificates**, each one is placed in a different file. If you want all the Certificates in a single file, use the **Print Certificates** option instead. In both cases, depending on

the size of your account, it might take several minutes to complete.

Once the Certificates are generated, you will be able to review the Certificates before sending them. Here is what steps you do in order to generate the emails:

Email Certificates

This allows you to easily email all the certificates in PDF format to the users.

As this is intended for emailing the certificates, each one is placed in a different file. If you want all the certificates in a single file, use the [print certificates](#) option instead. In both cases, depending on the size of your account, it might take several minutes to complete.

Once the certificates are generated, you will be able to review the certificates before sending them.

1. Select a certificate template

Certificate template

2. Select the certificates to generate

For

3. Filter certificates by user role

For users with role

4. Email certificates

All certificates Only certificates for a specific user

1. Select a Certificate template from the list of Certificates you designed.
2. Select the group of **Employees** the Certificates are to be emailed.
 - **All Employees**
 - **Only Employees with Attendance**
3. Set what Certificates do you want to email?

- **All Certificates**
 - **Only modified after:**
4. Filter Certificates by user role - Set this for users with a particular **User Role**
 5. Now choose to **Email Certificates** for all or specific user(s).
 - **All Certificates**
 - **Only Certificates for specific user(s)**
 6. Click the **Email** button to review the Certificates.

Review and Send

1. Review the certificates before sending

adam.sandler@engineerica.com	beverly.ardoneo@engineerica.com
big-gulp@engineerica.com	chaddb@engineerica.com
cheryl@ccc.com	onorris@engineerica.com
david@engineerica.com	demo@demo.com
djohnson@therock.com	tjohnson@here.edu

18 certificates created

2. Write the email content

Write the content of the email that will be sent to the users. The only valid keywords you can use are **{Name}** for the name of the user and **{Link}** for the link to the certificate being sent.

The certificate will be attached in the email sent. Including the link is not mandatory.

From:

Reply-to:

Subject:

Edit • Insert • View • Format • Table • Tools

3. Send them by email

Now that your certificates have been created and you have reviewed them, click below to send those certificates.

[Email Certificates](#)

7. Finally after reviewing and writing the email message to be sent click the **Email Certificates** button.

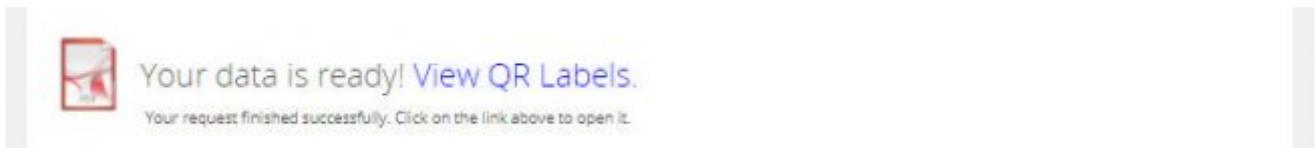
QR Labels

This is a printable sheet of 24 QR codes on 1-1/2" x 1-1/2" squares with the names and card numbers of each user in that **Employee Group**. Recommended printing with [Avery® Easy Peel® White Square Labels 22805, 1-1/2" x 1-1/2", Pack of 600](#).

Print QR Labels



To quickly print all the **Users'** QR labels click the **Print** button. You can also filter based on individual **Users** or **Employee Groups** to get only the labels you want.



This can also be done in the teal box in the top right corner of the screen when editing the **Employee Group** to print the entire group or if editing the individual **User** you can print just that **User's** QR label.

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