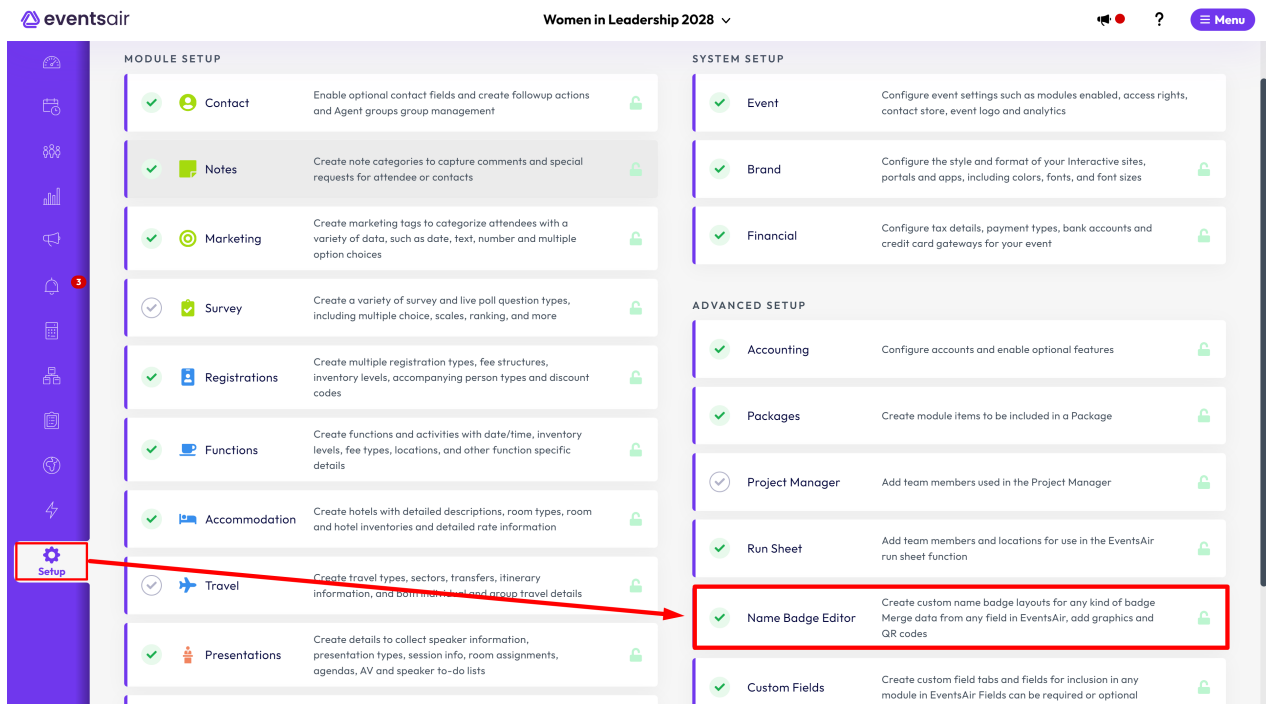# Create a Name Badge

> <   Want to jump to a particular section? Use the contents tab to the right of this article

This guide will walk you through how to create and print a simple name badge. You can find additional resources on this help site by search 'name badge'.
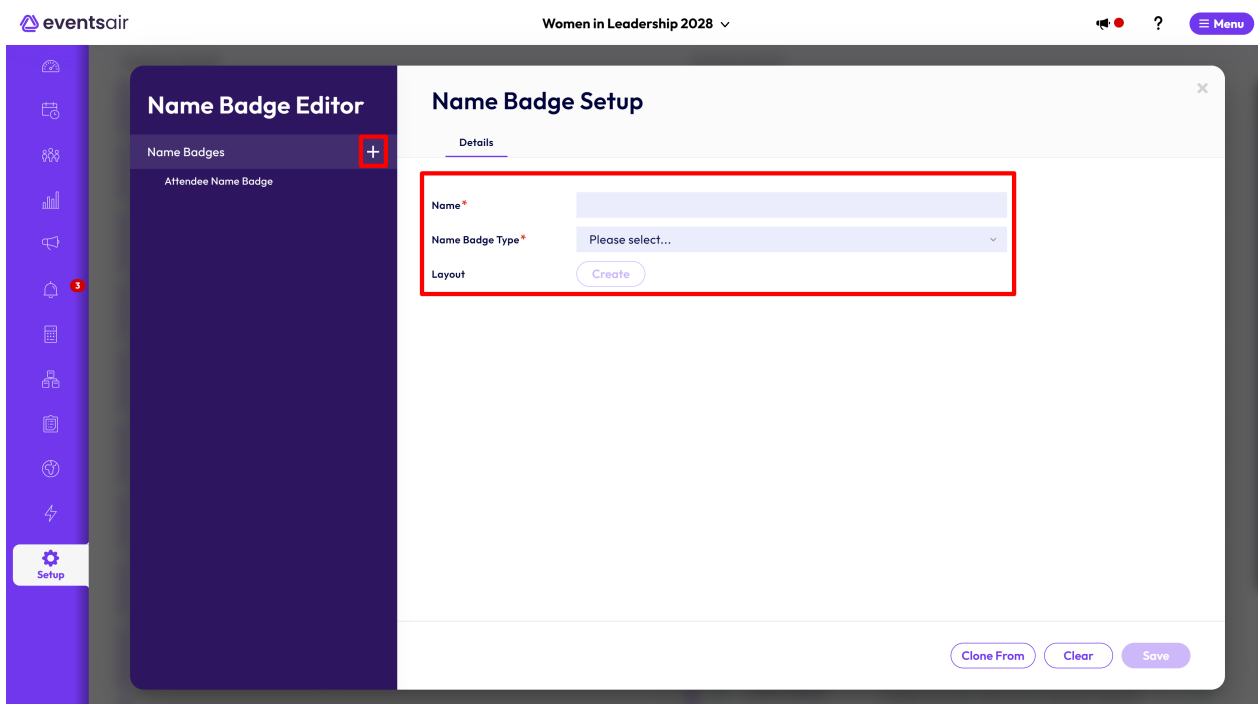
Creating your name badge

Navigate to the **Setup** panel.

On the right side, select the **Name Badge Editor.**

Click on the **Plus symbol** to create a new badge layout.

Enter a name for your new badge layout.

Next, choose the **name badge type carefully**, based on what data you want to include on the badge.

- NOTE: ALL badge types can pull data from the Contact module, but for other module data, you need to choose a matching badge type.
- For example, you can **only** pull Table Allocation/Table Number into a "Function Guest" badge type. You can't pull table numbers into a "Contact with Key Module Data" name badge type).
- If you don't see the data fields you need or you're having trouble getting an expression to work correctly in the Name Badge Editor, check that you have the right badge type.

Below are the different Name Badge types and which modules they can pull attendee data from:

- **CE Course Attendee** — Contact module PLUS Registered Attendee Details (CE Courses module).
- **Contact** — Contact module only.
- **Contact (including all module data)** — Contact Module and **any** other module in EventsAir. Only use this type if you're unable to get the data into another badge type, because editing can be slower due to the amount of data. You may not be able to get all data from every module.
- **Contact (including key module data)** — Contact Module <u>and</u> Registration and Functions modules (may not include ALL data from those modules).
- **Exhibition Name Badges** — Contact Module and the Exhibitions module.
- **Function Attendee** — Contact Module and Functions Module.
- **Function Guest** — Contact Module and Functions Module Guest information, if available – i.e. guests of attendees).
- **Registered Attendee** — can pull information from the "PREFERRED NAME" fields in the Contact Module.

- *Registered Partner* — *can pull information from the "PREFERRED NAME" fields in the Contact Module of a Guest.*

Note: For most registration-focused name badges, you can use one of the Contact badge types.

Then, select which Registration types to associate with this badge (this is helpful if you want to have different badges for different registration types).

Select **Create.**

This will bring you to the **Specify Page Settings** page.

Specify page settings

Specify Page Settings is an optional section that lets you select from hundreds of different name badge templates. This is useful if you're printing your name badges in advance, on sheets of six to ten name badges per page. These templates can be purchased in standard layouts, or you can use the page size and parameter settings on the right side to create a layout to a custom badge template.

It's very common to print badges individually as attendees are checking in. Alternatively, you might want to set up a layout where multiple badges print per page. In this example, we're creating a custom individual name badge layout, also called a "one-up" badge, so we just select the **Finish** button to bypass these options and continue to the name badge editor.

The name badge editor (similar to the Report Editor)

Normally, when you first access the name badge editor, you will see a default layout similar to this.
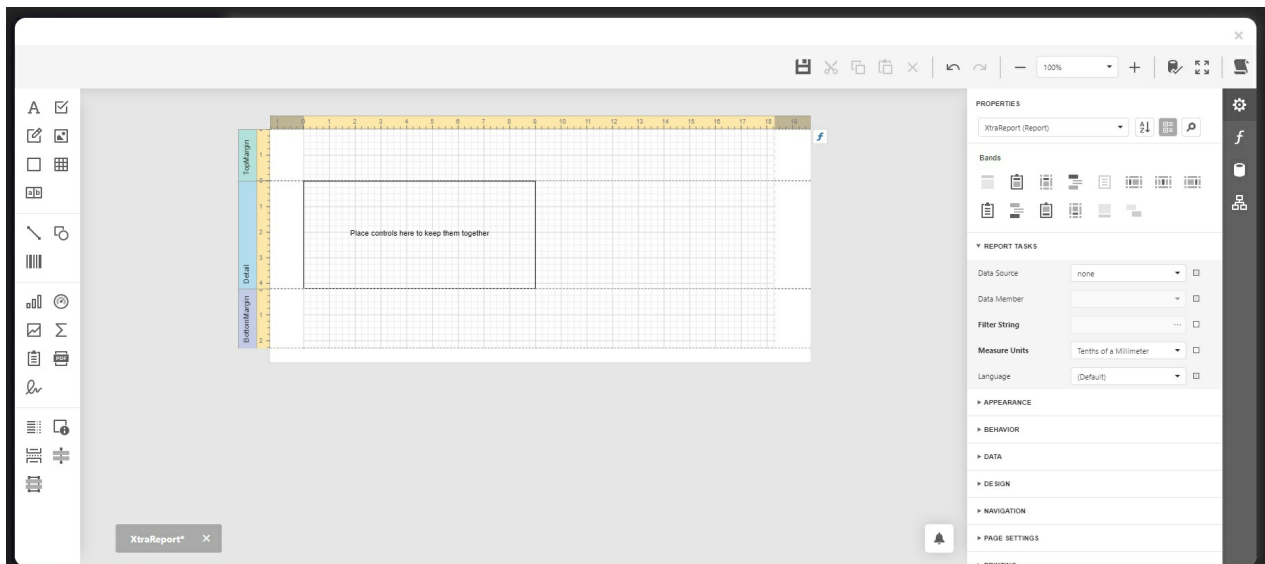
On the left menu, you will see a variety of formatting tools (icons) that let you add in a variety of content, including:

- Labels
- Images
- Tables
- Lines and shapes
- Other items not typically used for creating name badges

On top bar, you will see icons for important options such as:

- Save changes
- Undo and redo
- Cut, copy, paste, delete
- Zoom
- Full Screen
- Other options

The right hand panel is where you create settings and manage content and label elements.

Properties — lets you manage a variety of design and content elements, including:

- Different bands (areas of your page or badge layout)
- Reporting options
- Appearance options, such as borders and colors
- Behavior options, such as showing margin lines, measurement unites, visibility and more
- Data options
- Design options, such as watermarks, snap to grid and more
- Navigation Options
- Page Settings, such as page width and height, paper size and margins
- Printing Options

You use these in a similar way in both the Name Badge Editor and Report Editor. We don't go into all these features in this article.

Expressions — an advanced set of tools for managing different programming expressions

Field List — used to place content from the EventsAir database onto your name badge

Report Explorer — used by advanced users to navigate around a report or name badge layout

Building a name badge template

These are only the basic elements of a name badge. Your designs will be unique to your organization and if you have any questions, please reach out to our Support team for any questions you may have.

Step 1: Be sure you're editing "Properties" for the whole badge (measurement units & margins)

1. Make sure the Properties Menu is displayed on the right. If you don't see it, you'll need to select the cog icon to open it.

2. Make sure you're editing the entire layout and not a specific band or area of the template. To do this, check what's in the dropdown menu the top of the Properties window. You can see different elements of the layout highlighted when you choose different options from this dropdown menu. Look for one with (Report) listed after

the name; when selected, no particular section of the badge is highlighted.
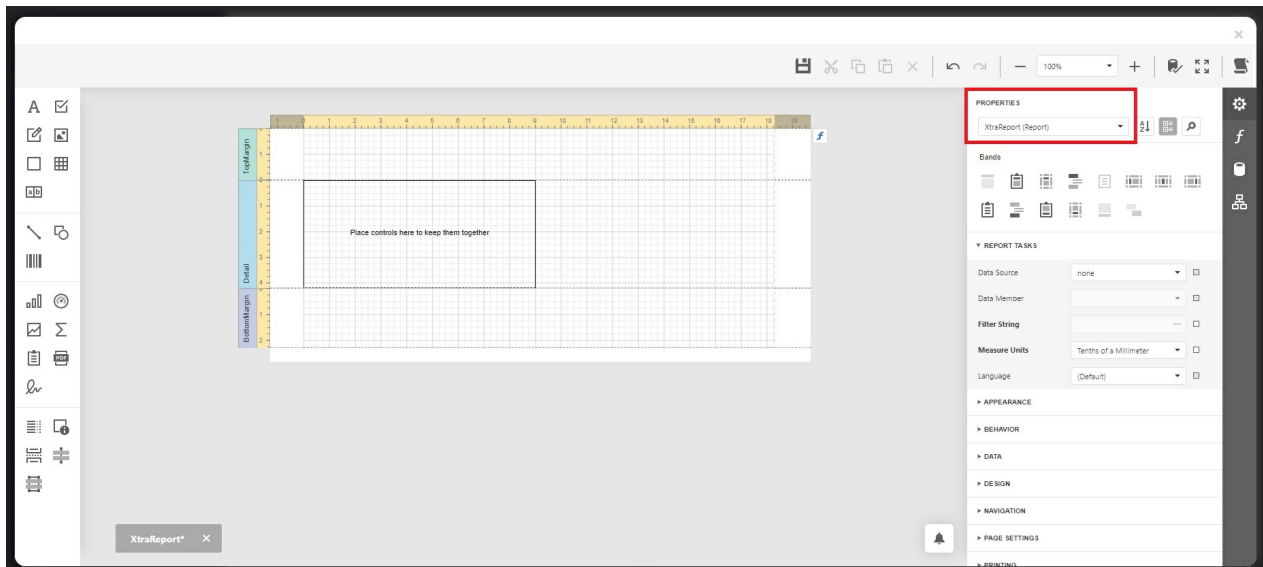
Step 2: Set your units of measurement

The Name Badge editor can work in:

- Tenths of a millimeter
- Hundredths of an Inch
- Pixels

To do this:

1. Expand Report Tasks
2. Set Your Measure Units as required

For this example, we will work in tenths of a millimeter

PROPERTIES

XtraReport (Report)

Bands

▼ REPORT TASKS

Data Source   none   ▾   ☐

Data Member   ▾   ☐

Filter String   ⋯   ☐

Measure Units   Tenths of a Millimeter ▾   ☐

Language   (Default)   ▾   ☐

▶ APPEARANCE

▶ BEHAVIOR

Step 3: Review/edit page settings

1. Expand Page Settings section

2. Expand Margins section

3. Set all margins to 0 (required for most one-up badge formats including roll type printers)

Step 4: Review/edit panel (badge) dimensions

1. Back up at the top, change the dropdown selection of what's being edited to Panel 1 (you can also click in the blue badge area in the layout).
2. Expand the Layout section
3. Expand the Size section
4. Change height and width to the correct dimensions for your name badge.
5. For this example (a vertical badge): Change height to 1000; change width to 600
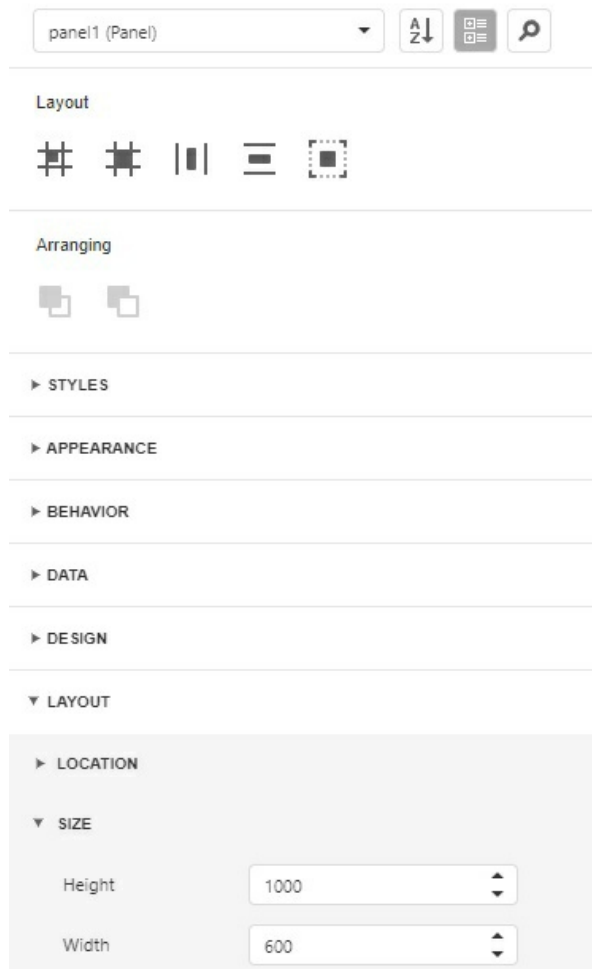
Step 5. Add an image header

To add a graphic image to the top of your badge:

1. Drag an **Image element** from the left menu...

   ...onto your badge. (You can also hover over an icon if you're not sure what it is).

   On the right, in Picture Box Tasks (which will display when you select your new picture box):

2. Select what image will appear in your box using **Image Source** (click the three dots to open up files, or put a source URL into the Image URL box).

3. Set **Sizing** to **Zoom Image**

4. Resize **picture box** to the width of the badge

5. Resize **the height** as needed

   HINTS: You can check the width of your picture box by selecting it, then checking the width in the Size section. Under "APPEARANCE", you can remove the **border on a picture box by** changing the Border Width option to Zero. You can also remove the border by clicking the "no border" option (the first of the border options shown).
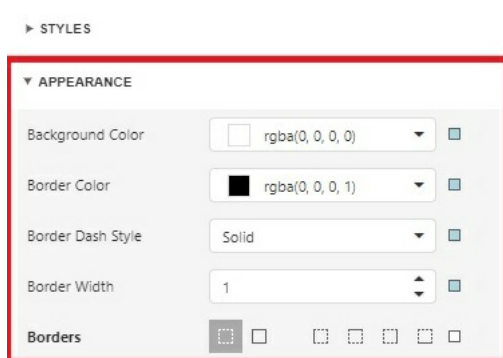

Step 6. Add data fields to your badge

The next step is where you decide what information you want to display on the badge. This is easily handled by dragging and dropping the needed fields onto the badge layout and formatting the content.

Please note we are building a sample badge; you can choose to use or not use any element described.

1. On the right, select the **Fields** icon (the silo/cylinder) to see **Field Lists.**
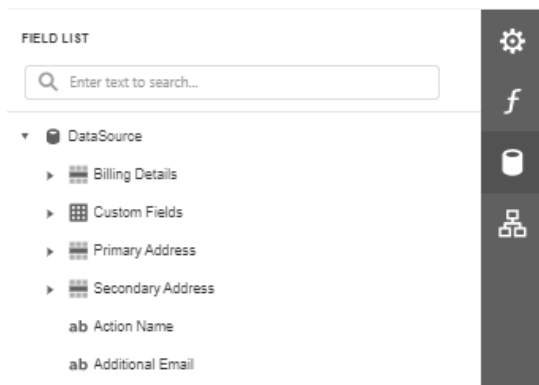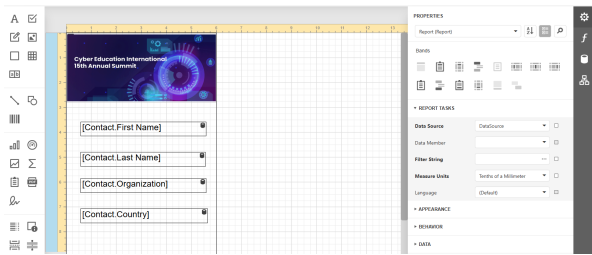

2. Expand Data Source

3. Expand Contact

4. Drag **First Name** and **Last Name** merge fields over to your badge design area

5. Drag over **Organization**

6. Drag over **Country**

   Your sample badge may look a little like this:

Step 7. Format your data/merge fields

1. Click on the **Properties View** on the right.
2. Expand the **Appearance** section.
3. As needed:
    1. Remove **borders**
    2. Set **fonts** and **font sizes**
    3. Set all fonts to **Bold**
    4. Change **font colors** (if needed)
    5. Drag your cursor to selection all of the **merge fields**
    6. Drag and set the **width** as needed
    7. Set the **text alignment** as needed (typically centered)
    8. Adjust **spacing** between fields as needed
    9. Select **Save** to save your settings

Now your example badge will start to look a little like this:
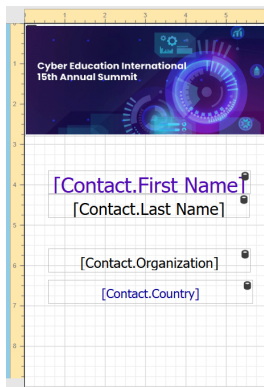
Advanced options

Once you build your basic name badge you can easily add to your template with a variety of advanced options.

Images and photos

- Drop in photo or images simply by dragging over the Picture Box.
- Make an image into a background by selecting Send to Back from the Arranging options on the right.
- If you have collected headshots of attendees in advance, you can easily insert the "Photo Uploaded At" option found in the Field List.

- Remember, the onsite portal, used for onsite check in and badge printing also has a printing function, allowing you to take photos of attendees and insert them onto the badge and then print it.

Add a QR Code or Bar Code to a name badge

1. Click on the **Field List** view on the right.
2. Expand the **Contact List.**
3. Drag across either the **Contact QR Code** or the **Contact Bar Code** fields. For this example, we're using **Contact QR code.**
4. Position your **Contact QR code** below the "Country" field and drag the box size to fill the space appropriately.
5. Back in **Properties** on the right, in **Appearance**, remove the **border**.
6. Also in **Properties** on the right, in Picture Box Tasks, set the sizing to **Squeeze.**
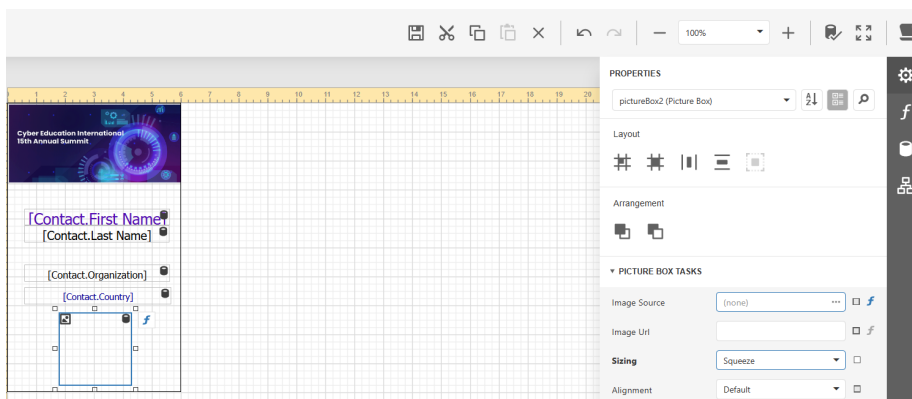

Calculated fields and expressions

There are times where you want two or more merge fields **shown on the same line**, usually either [City, State] or [First Name Last Name].

The challenge is how to set these up so they flow appropriately together without extra spaces. Fortunately, this is easy to do in EventsAir — using a feature called calculated fields and expressions.

In this example, we are going to create a **First Name Last Name Expression** so these will appear on the same line.

1. Open the **Field List,** using the **Fields icon** on the right (the silo/cylinder).
2. Click the **DataSource** field to see options, then click the Add Calculated Field icon (the second icon).
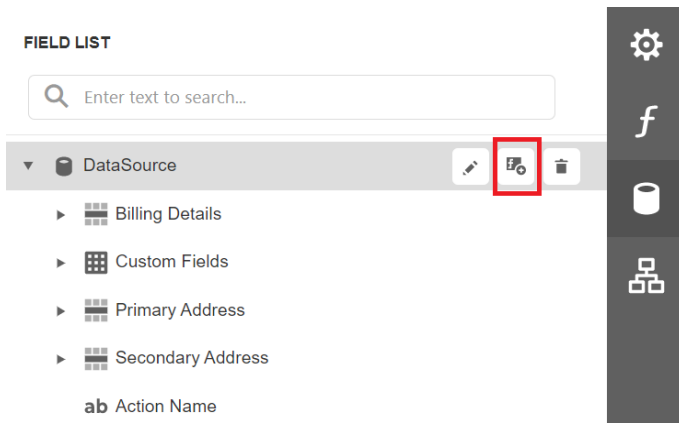
3. A new field called **calculatedField1** will appear in the list.

4. Drag this field to the desired location on badge template.

5. Click on the new **Calculated field** to select it.

6. Be sure to **change the font and font size** as needed. [Because we're going to use this to replace separate FirstName and LastName fields, you can remove those from your badge.]

7. To edit the calculated field, go back to the **Field List** and expand **DataSource**. Scroll down until you find **calculatedField1.**
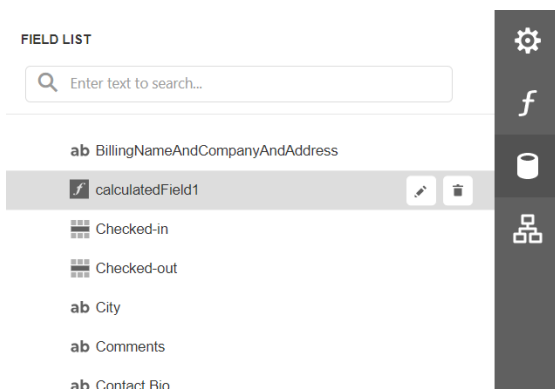
8. Select the edit icon, and then find the **Expression** field at the bottom.

9. Click on the three dots on the right to edit it (this will make the Expression Editor window appear).

FIELD LIST

The **Expression Editor window** looks like this:

1. To create your expression and combine fields, select **Fields** in the left window.

2. For our example, in the second window, locate the **Contact section,** then click the arrow to expand it.

3. Look for **First Name** and **Last Name** fields (again, you'll need to locate the fields that suit your task).
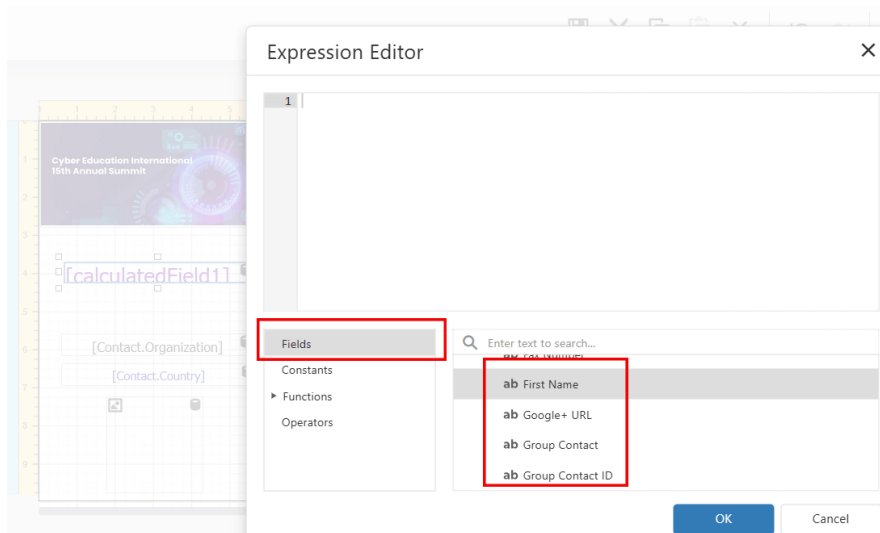
4. Double click one at a time on **First Name** and then **Last Name**. The two fields will appear together at the top of the editing window.
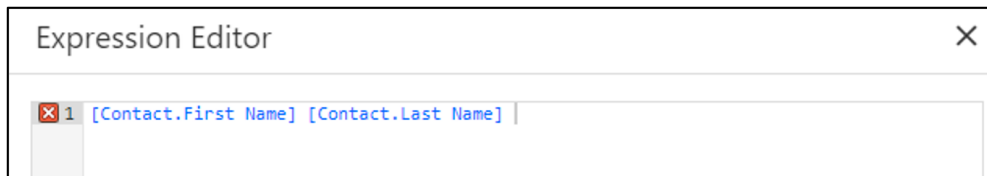
5. Next, you will need to insert a space between the two fields. To do so, enter the following code between each field:

```
+ ' ' +
```

The code is: a **plus symbol**, followed by a **space, a single quote mark**, followed by a **space, another single quote mark** followed by a **space,** then finally a second **plus symbol**.

6. Remove any other spaces on either side of this code, so that your expression now looks like this:
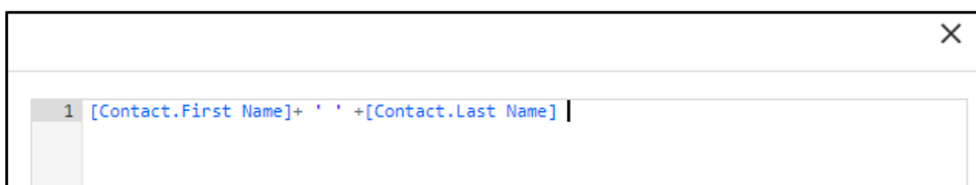
Save and close. Your badge will combine the first two fields on the same line, like this:

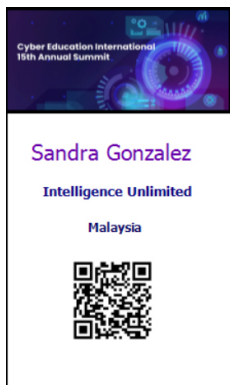**You'll need to use this method if you want to join two or more expressions on the same line, automatically adjusted so there's just one space between the first and second fields.**

You can use this technique for many different reasons.

If you want to insert a comma, enter it between the two single quotes. (You might do this if creating a calculated field that combines City with Country, for example.)

You can also give each calculated field a "Display Name" to help you find it easily when editing.

Registration type bands

Another popular addition to name badges is to display a color band with the attendee's registration category displayed.

This way, the registration type, such as Attendee, Exhibitor or Presenter are displayed and be easily viewed by other attendees.

1. From the left menu, drag across a Label (the capital A icon).
2. Pull to the width of the name badge or resize as needed.
3. Position the label as needed.
4. Set the font, font weight and alignment as needed.
5. Click on the **Expressions** icon **(the italicized F)** just to the right of the label.
6. Click on **Fields,** then navigate to the registration section.
7. Expand **Registrations** and then expand **Registration Type.**
8. Double click on **Name, Apply, and Save ["OK"].**
9. Finally, under **Appearance,** you can set the background color of the label as well as the font color.
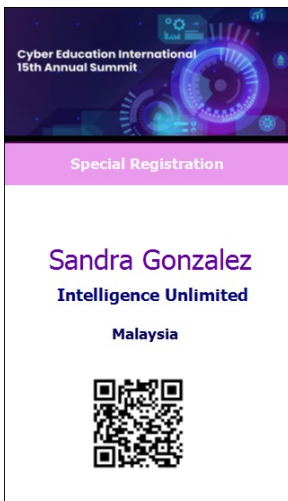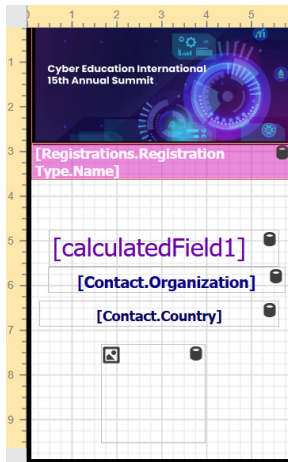
Using expressions for registration type colors

You can use the Expression Editor to automatically display specific color bands based on what registration type is shown for a specific attendee.

This allows you to have specific color bands for each different registration type, (e.g. blue for regular attendees, orange for exhibitors and red for presenters) that are automatically displayed based on the registration category.

1. Create and add a registration type band with color for each registration type as shown in the previous section.
2. Then, click on the expression icon to open the expression editor for that field.
3. Navigate to the visibility tab and enter the following code entering the name of the registration this band is for.

   ```
   Iif([Registrations.Registration Type.Name]=='(registration name)',TRUE ,FALSE )
   ```

   Please note, expressions can be case sensitive. You will need to enter the name of the registration exactly how it is entered in EventsAir.

4. Repeat this for each registration band.
5. Finally, select your registration bands and in the properties to the right, expand the behavior section and untick visible. This will make so that only the specific registration band will turn on and be visible.

Testing your name badge

It is quite easy to test your name badge as you go through and customize the design and format.

Locate a test attendee record and from Attendee Tools, select Name Badge to preview what the badge will look like.

Printing badges onsite

When planning for onsite check-in at your event, you will typically prepare a name-badge template that will let you print name badges one at a time "on-demand."

In other words, when attendees check in via self-check-in, auto event check-in or assisted check-in using the Onsite Portal, their **name badge prints at that time** ready to be placed in a name badge holder and given to the attendee.

There are a variety of printers you can use for printing one badge at a time, and these can be thermal (black print only) or full color using ink jet or other technology.

You can purchase these printers or rent them as needed, and many companies provide both a printer and a touch

screen kiosk using either a PC computer or a Microsoft Surface Tablet (also using Windows), making it easy to integrate with EventsAir.

For more information on printing badges and going onsite, search our help resources for these topics.