

BADGING MODULE QUICK REFERENCE GUIDE

Overview

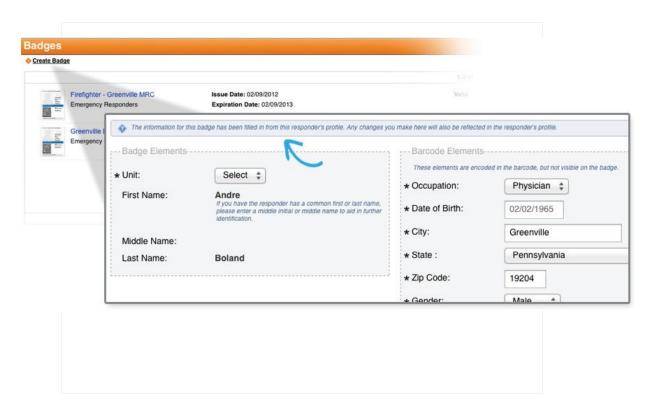
Key aspects of badge management include working with templates, creating and issuing badges for responders and volunteers, and viewing and revoking badges.

Note: Responders and volunteers are both acceptable terms for the people who respond to and volunteer for incidents. Although your solution may refer to them as volunteers, responders is used throughout this document for consistency.

Creating and Issuing Badges

When you choose to create a badge from a responder's profile, some information about the responder is automatically populated on the badge.

Important: Modifying the responder's information on the badge changes the information on their profile.



Some elements you enter to create a badge, such as Unit and Name, are visible on the badge. Meanwhile, information entered in the Barcode Elements area, such as Occupation and Date of Birth, is encoded and only readable when the badge is scanned. For more information about the visibility of badge data elements, see the Badge Barcode article in the online help available through your solution.

To Create a Badge

- 1. On a responder's profile, go to **Profile**: **Badges**.
- 2. On the upper left, click Create Badge. The create badge page opens.
- 3. Enter the name of the badge.
- 4. In the **Template** list, click the template you want to use to create this badge.
- 5. In the *Badge Elements* and *Barcode Elements* areas, enter the required information.
- 6. To see what the badge will look like, click **Preview**.
- 7. When you are ready, click **Save**.

To Issue a Badge

- 1. On a responder's profile, go to **Profile**: **Badges**. Badges that can be issued to the responder are displayed.
- 2. Locate the badge you want to issue and, in the *Badge Details* area, click **Issue Badge**. The badge page opens.



- 3. Enter the expiration date.
- Click Issue.

Viewing and Revoking Badges

You can view badges to check their status, which indicates whether the badge is in use or not, and why.

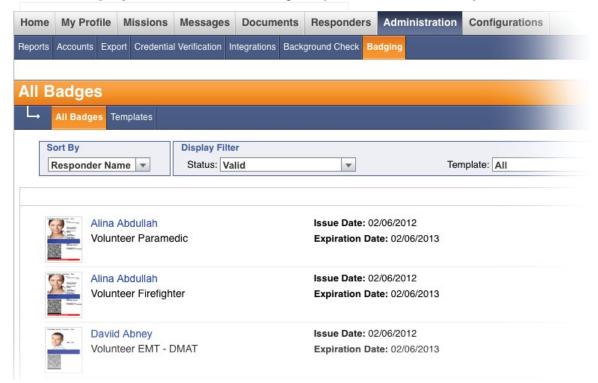
- **Not Issued** The badge was created, but has never been issued to a responder.
- Valid These badges were issued, and they are valid until the specified expiration date or until they are revoked by an administrator.
- Invalid These badges are no longer valid because they have expired or been revoked. The reason they are not valid appears as the sub-status (for example, Invalid: Expired).

To View Badges

1. Go to **Administration**: **Badging**. The *All Badges* page opens.

Note: By default, only *Valid* badges are displayed on the *All Badges* page. To view expired and revoked badges, in the **Status** list, click **Invalid**.

- 2. To sort or filter badges, take one or both of these actions.
 - a. In the **Sort By** list, click the data element you want to use to organize the badges.
 - b. Use the **Display Filter** to filter the badges by **Status** and/or **Template**.



- 3. To get more information about a badge, take these actions.
 - a. Click a responder's name to view the badges on their profile.
 - b. Click the badge name to view the badge details page.

Note: On the badge details page, you can view changes through the *Badge Change Log*.

To Revoke a Badge

- 1. Go to Administration: Badges.
- 2. Click the responder's name. The responder's profile window opens.
- 3. Click the badge you want to revoke. The *Badge Details* page opens.
- 4. Click Revoke Badge. A confirmation page opens.



- 5. Enter the reason for revoking the badge and, if necessary, provide additional details to explain the situation.
- 6. Click **Revoke**.

Note:

- When a badge has been lost, stolen, or damaged, we recommend you revoke it to avoid unauthorized use.
- To replace a revoked badge, you can create a new one.
- Badges that have been revoked cannot be reprinted