User Guide

EZBadge Model 100

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1 What is EZBadge

EZBadge is a computer system for use at events. Guests can use a web browser to check in or self-register and they receive a name badge they can wear. The registration information is saved in a database for later use.

Many guests can register at the same time; no congestion at the registration table. They each use a laptop, tablet or other computer that is connected to the **EZBadge** network.

EZBadge is simple to operate. No technical skills are needed. There are just a few settings that allow you to personalize the registration information and the name badges for your event. No Internet connection is needed. **EZBadge** provides its own private network.

2 User experience

When guests attend an event (attendees) they might see greeters with laptops or tablets, or perhaps some self-register registration stations. These are desktop PCs or MACs, or laptops or tablet computers that you provide. Additionally, you can invite users to use their own smartphone or other device (BYOD) to self-register. Or maybe use a combination of both approaches.

You might provide sign for BYOD such as:

Welcome to MY EVENT

Please register and receive a name badge.

Use one of the laptops or connect your own iPad or smartphone.

Just connect to Wi-Fi network called MY_GROUP_NAME then open your browser and go to ez.com

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Use an event name and a Wi-Fi network name appropriate for the event. The URL can be any URL that starts with http://. For example, http://ez.com Connecting to this page will re-direct the guest to the event registration page.

Be sure your registration device is ONLY connected to the EZBadge Wi-Fi or Ethernet, and not to the public Internet over Ethernet or cellular data connection.

Users will see a registration web page that you have customized with a logo, a greeting, and a form to collect the information for the badge and any other information that the guests should supply.

Here is a simple example:

When guests click on the PRINT BADGE button, they will pick up their badges at the badge printer. This can be self service or a greeter may hand them their badges and welcome them to the event.

Here is a sample badge:

If the check in feature is active, as the first or last name is entered, matching entries in the check in list are displayed.

Just click on the desired entry and the form will be automatically populated. Then click on "PRINT BADGE"

Note: the check in feature may not work on older devices such as iPad-1 which do not support current web standards.

2. What is supplied

The **EZBadge** system includes the EZBadge server, a printer, the first roll of badges, a power cube for the server, a USB cable to connect printer to server, and power cord for the printer. An EZBadge quick start guide is included and literature from Brother about the printer may also be included.

The badge printer is a Brother QL-600. It is unmodified and can be used on a Windows or Mac computer when not used with EZBadge server. Only use with EZBadge server is covered here.

The **EZBadge** system also includes your first roll of self-stick name badges. To get more badges, buy only Brother DK-1202 or compatible badges.

These are 2.4" X 3.9" (62mm x 100mm) self stick badges, peel off badges that are pre formatted to size (referred to a die cut). They may also be called shipping labels. Usually there are about 300 badges per roll.

The server is a small box containing a powerful computer, a Wi-Fi network server and special software that makes it all happen. It also comes with a power supply. Be sure to use only this power supply, other power supplies may cause erratic operation.

The registration devices are not included. These can be laptops, iPads, Android tablets, smartphones or any device that can be used to access web sites over Wi-Fi. After connecting to the **EZBadge** Wi-Fi network or to the **EZBadge** server with an Ethernet cable, they become registration devices. You supply the registration devices or let your guests self register with their personal equipment.

3 EZBadge operation

3.1 Hardware preparation

The badge labels are loaded and the BrotherQL-600 printer and **EZBadge** server is connected to the printer using the USB cable. Connect respective power supplies to printer and server and plug into power outlets.

> Hint: Use a power strip for convenience.

> Hint: Be sure to connect USB cable from printer to server, not to PC/Mac

> Hint: Be sure to turn on printer: power button on right, status light above button should be green.

3.2 Pre-event setup

Before the event, customize the registration web page and connect your registration devices to the **EZBadge** Wi-Fi or Ethernet network. In addition

ensure that you have more than enough badges to supply one to each guest even if the event is sold out. Create event specific registration signs.

3.3 Pre-registration setup

Before the first guest registers, prepare the registration area with tables, the **EZBadge** system and a supply of badges. Connect all registration devices to the **EZbadge** server and print one test badge to ensure everything is working correctly. Post all registration signs.

> Hint: The first test badge, enter the event name and date in place of the first/last names to help identify the resulting spread sheet.

3.4 At the event

Register the guests or have the guests self-register. If you have a greeter, this person may hand the printed badges to the guests with a few words of welcome. Otherwise the guests can obtain their own badges. Refill the printer with additional labels as needed.

3.5 Post-event breakdown

Save registration database to your laptop or copy to a thumb drive and turn off the **EZBadge** system.

4 The Brother Q-600 printer
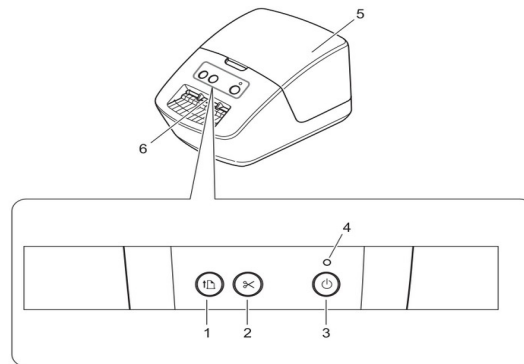
1 Feed Button	**4 Status LED**
2 Cutter Button	**5 DK Roll Compartment Cover**
3 Power Button	**6 Label Output Slot**

Use Only with 120VAC power.

The indicators light and flash to indicate the Label Printer's status.

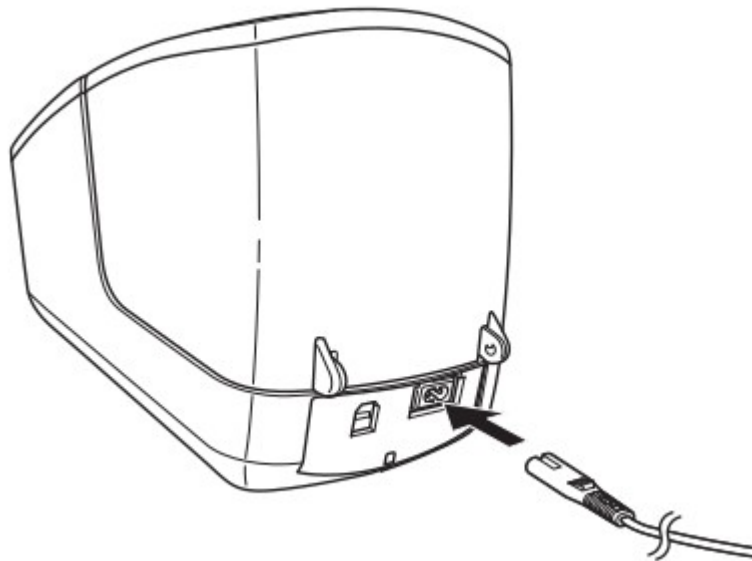| Status LED	Condition
Not lit	Power is Off
Steady green light	The Label Printer is in one of the following modes: • Idle mode • Feeding mode • Printing mode • Cutting mode
Flashing green light	The Label Printer is doing one of the following: • Receiving data • Canceling the print job
Steady orange light	One of the following is occurring: • The DK Roll Compartment Cover is open. Close the DK Roll Compartment Cover correctly. • The Label Printer is in Reset mode. • If the Status LED lights in orange for 0.5 second after printing, the Label Printer is erasing all print data. For more information, see the *User's Guide*.
Flashing orange light	• The Label Printer is in Cooling mode. • Label Printer settings are being reset. For more information on resetting the Label Printer, see the *User's Guide*.
Steady red light	• The Label Printer is in Boot mode. If the Label Printer remains in Boot mode, contact Brother Customer Service. • The Label Printer's firmware may need to be updated. For more information on updating the firmware, see the *User's Guide*.
Flashing red light	If the red light flashes at one second intervals, one of the following errors has occurred: • Roll end error • No media error • Wrong media error • Feed error • Cover open error • Transferred data error
	If the red light is off for one second, flashes twice rapidly*, and turns off again, then a cutter error has occurred.
	If the red light flashes rapidly*, there is a system error. Contact Brother Customer Service.

* Rapidly = three times per second.

4.1 Loading printer labels

The following procedure is used to load printer labels.

Hold the printer by the front, and firmly lift the DK Roll Compartment Cover to open it.
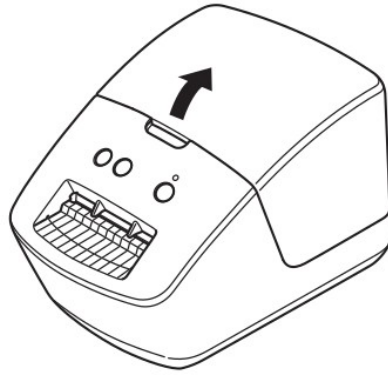
IPlace the DK-1202 Roll into the Roll Spool Guide (1).

• Make sure that the Roll Spool Arm (2) is inserted firmly in the Roll Spool Guide.

• Make sure the Stabiliser (3) slides into the notch of the printer.
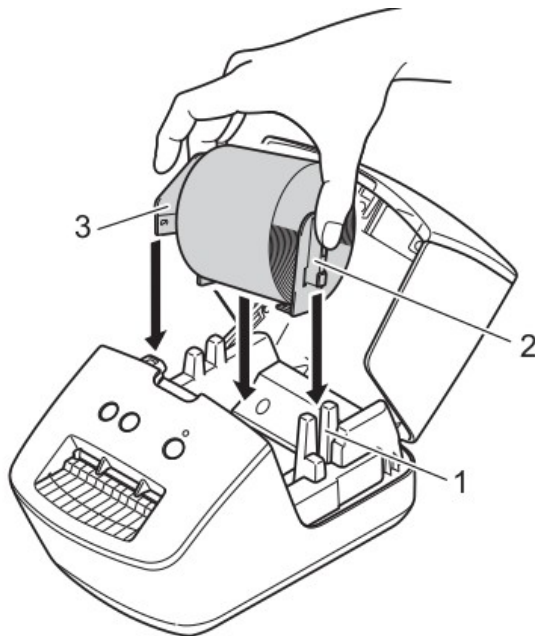
Thread the DK-1202 Roll through the printer.

• Align the edge of the DK-1202 Roll with the upright edge of the Label Output Slot.

• Check that the DK-1202 Roll is threaded straight so that the labels will not be skewed

Make sure that the label guide does not pinch the label. Close the printer cover.

5 Customize EZBadge

The **EZBadge** server comes pre-configured. However you can customize it as needed. Configurable items include:

- Information collected on the registration page
- Information printed on the badge
- Logos printed on the badge and displayed on the registration page
- Text banners printed on badge and displayed on the registration page
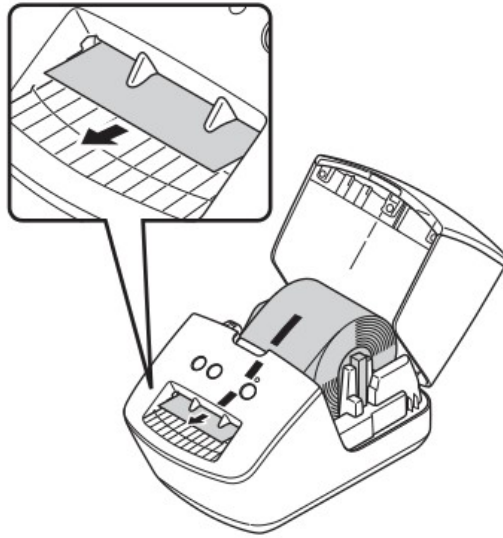- **EZBadge** network and system security settings

5.1 EZBadge administration access

Access to all **EZBadge** system administration functions is through a password protected web page.
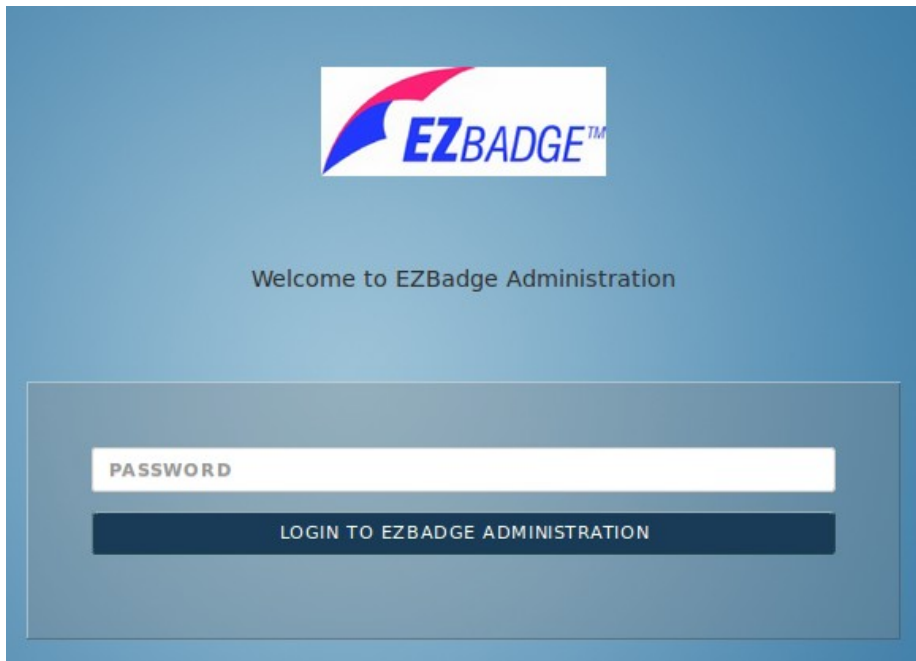
To use this functionality first connect your laptop or other device to the **EZbadge** system Wi-Fi network or directly to the **EZbadge** system using an Ethernet cable. Then open the web page at **10.0.0.1/admin** and supply the correct password.

The default password is **badgeez**. It can be changed on the Configuration page.

Once logged in, you will have main navigation buttons at the top of each page.

The format of these pages depends on the device and browser you are using. The figures in this manual may vary from that displayed your browser, but the information and operation are the same.

This user's guide is also included in **EZBadge** server under the OPERATION page.

5.2 Status
Information about the state of the **EZBadge** system is obtained by clicking the STATUS button.

Guest Check-in list
The "Guest Check-in List" allows display of the current registration list that includes any pre-registered guests and any guests who were registered on-site. It can also display the check-in list.

Guest registration list
Clicking on this link gives access to the current list of guests.

Guest Registration List

EZ-BADGE has received 3 registrations.

REGISTRATIONS FOR HELLO

CNT	FIRST NAME	LAST NAME
1	Jane	Doe
2	Thomas	Jefferson
3	George	Washington

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Show status

Clicking on this list gives access to a display that shows the count of registrations and the status of the **EZBadge** system.

Show Status

FOUND PRINTER: QL-600

PRINTER SERVER QUEUE IS EMPTY: NOTHING TO PRINT

PRINTER IS OK: WAITING FOR SOMETHING TO PRINT

PRINTER IS OK

EZ-BADGE has received 2 registrations.

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Any problems with printer will be reported here. In this example, the cover on the printer is left open.

Show Status

FOUND PRINTER: QL-600

PRINTER SERVER QUEUE IS EMPTY: NOTHING TO PRINT

PRINTER IS REPORTING AN ERROR: CHECK PRINTER 255

+ model: ql600 + Cover open
EZ-BADGE has received 2 registrations.

Go Back

Health check
Clicking on this link gives access to a display that shows the state of various components of the **EZBadge** system. This displays the serial number and software version of the **EZBadge** system. The other items are only useful if support is needed for the **EZBadge** system.

### Web server log
Clicking on this link gives access to a display of the web server log. This is only useful if support is needed for the **EZBadge** system.

System log
Clicking on this link gives access to a display of the system log. This is only useful if support is needed for the **EZBadge** system.

5.3 Configuration
To get to the Configuration page, click in the CONFIGURATION button.
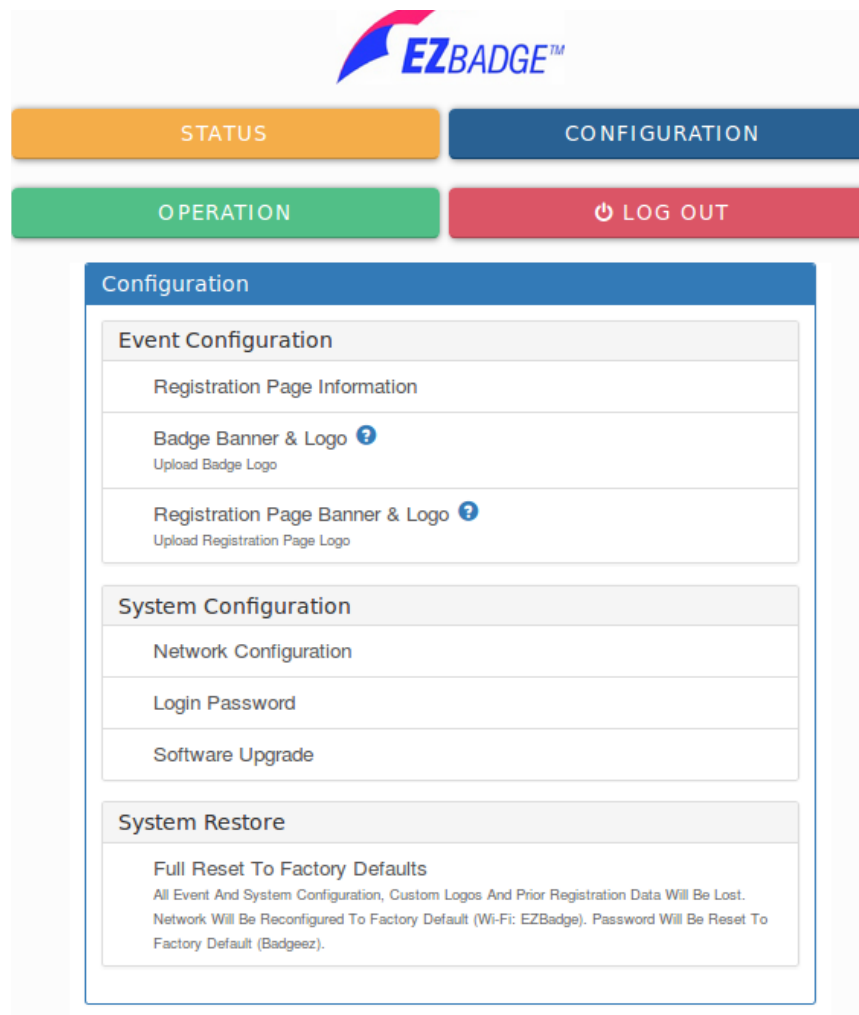
This display allows the user to configure the information collected from the guests and displayed on the badges, and to configure the **EZBadge** system, to update the software to the latest release and to restore the software to the factory defaults.

> Note: Resetting to factory defaults removes all previous configuration & registration information. This includes resetting the password to "badgeez".

Registration page information

Clicking on this link displays a page that controls the information collected from the guests when they register. This will include information to display on the printed badges as well as information to be collected but not printed.

> Note: When ever the registration page is changed, the check in list is automatically deleted (if there is one) and must be recreated. See "Guest Check-In List Manager".

Registration Info Config

Control what information users enter, whether user is required to enter the information and which line of the badge the information is printed on.

[ACTIVATE & DISPLAY PAGE] [CANCEL]

	Active	Print Line
Prefix	☐	None ▾
First Name	☒	1 ▾
Middle Initial	☐	None ▾
Last Name	☒	1 ▾
Suffix	☐	None ▾
Email	☒	None ▾

	Active	Print Line	Text Box	Radio	Checkbox
Field 1	☒	2 ▾	◉	○	○
Field 2	☒	3 ▾	○	◉	○
Field 3	☒	None ▾	○	○	◉
Field 4	☐	None ▾	○	○	◉
Field 5	☐	None ▾	○	○	◉
Field 6	☐	None ▾	○	○	◉
Field 7	☐	None ▾	○	○	◉
Field 8	☐	None ▾	○	○	◉

[ACTIVATE & DISPLAY PAGE] [CANCEL]

The Active checkbox controls whether or not any particular field or name component is displayed on the registration form. To activate or deactivate a particular field or name component, click on the Active checkbox for that item. When the checkbox displays a check mark, that line will be displayed on the registration form and optionally printed on the badge. If the Active checkbox for a particular field or name component does not display a check mark, this item will neither be displayed on the registration form nor printed on the badge.

The Print Line number drop box controls the line on which any particular field or name component will be printed. Up to four lines may be printed on a badge. Multiple fields are allowed on any one line. Any field or name component for which the Print Line number is None will not be printed. If the Active checkbox for a particular field or name component does not

display a check mark, this item will neither be displayed on the registration form nor printed on the badge.

The **EZBadge** system requires a name to print on the badge. Either the First Name or the Last Name fields or both must have a check mark in the corresponding Active checkbox and must have a Print Line number selected. All other fields and name components are optional. This is a safety feature that avoids guests printing blank badges.

All badges may have logo and message printed above the first line. Information on setting these two items is contained in the Badge Banner & Logo section of this document.

There are six fixed fields that comprise the name components. These are displayed on the top of the page. The fields are:

- Prefix (i.e. Mr Ms, Dr) - optional
- First Name *
- Middle Initial - optional
- Last Name *
- Suffix   (i.e Jr, PhD)
- Email - optional

    * Must have a First and/or Last Name
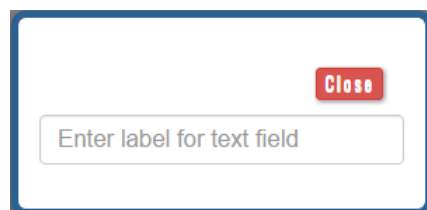
The bottom section of the page contains eight fields that can be configured as needed. Each one can be configured to collect a single free-form item in a text box, one item from a list of fixed items from a set of radio buttons, or many items from a list of fixed items in a set of checkboxes. The Active checkbox and Print Line number drop box are explained above. The three radio buttons control which display option that field will have on the registration form. To configure a field, click on the desired option and a pop-up appears that allows the field to be configured.

The ACIVATE & DISPLAY PAGE button causes a sample of the registration page that users will see to be shown in a new browser window. This will be active the next time an guests connects to the **EZBadge** system or refreshes the registration page.

The CANCEL button closes the page without updating the registration page

Text box
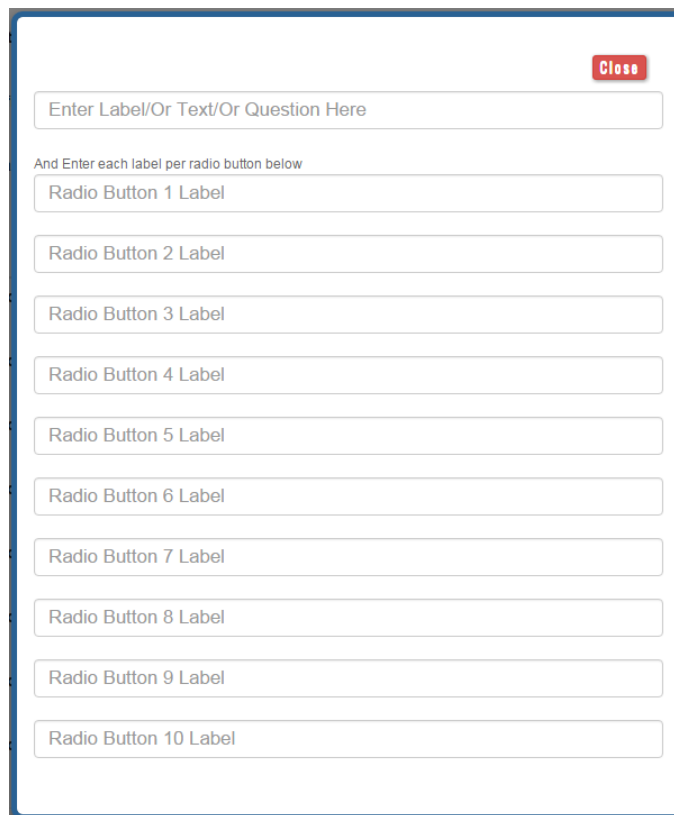The Text Box radio button causes a form to appear that contains a single text field.

Enter in this field the text that describes the information needed from the guests. For instance you wish to obtain the telephone numbers of the guests. In this case you enter "Telephone Number" in this field and the guests will enter a telephone number.

Click on Close to update the badge information. If a Text Box field is to be printed, only the information entered by the guest will be displayed on the badge.

Radio

The Radio radio button causes a form to appear that contains eleven text fields.
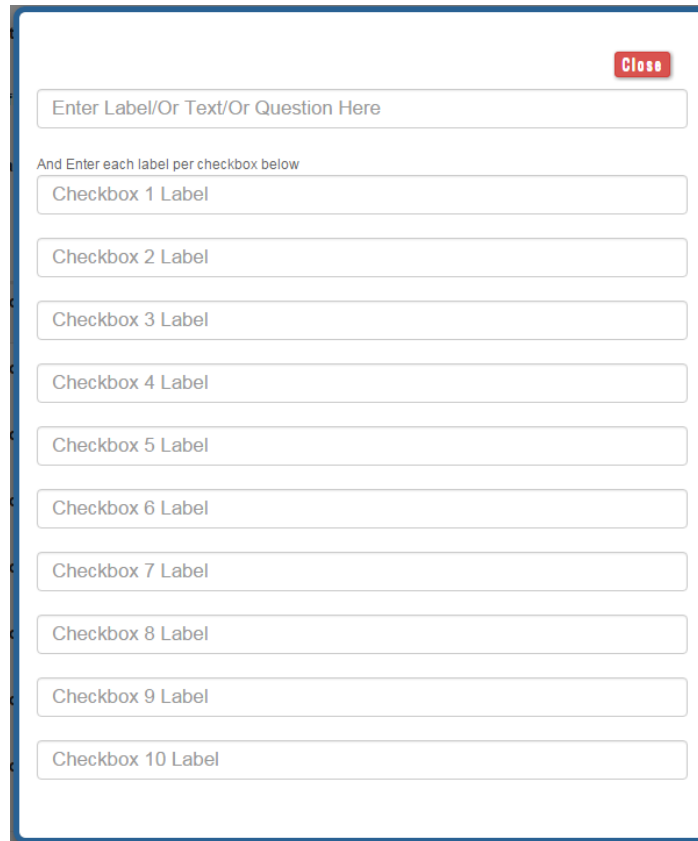
The one at the top is used to enter a label for the set of radio buttons. The rest are labels for the individual radio buttons. Any radio buttons for which this label is blank will not be displayed. The rest are labels for the selection radio buttons. Any selection radio button for which the label is blank will not be displayed.

Click on Close to update the badge information. If a Radio field is to be printed, only the label selected by the guest will be displayed on the badge.

Checkbox

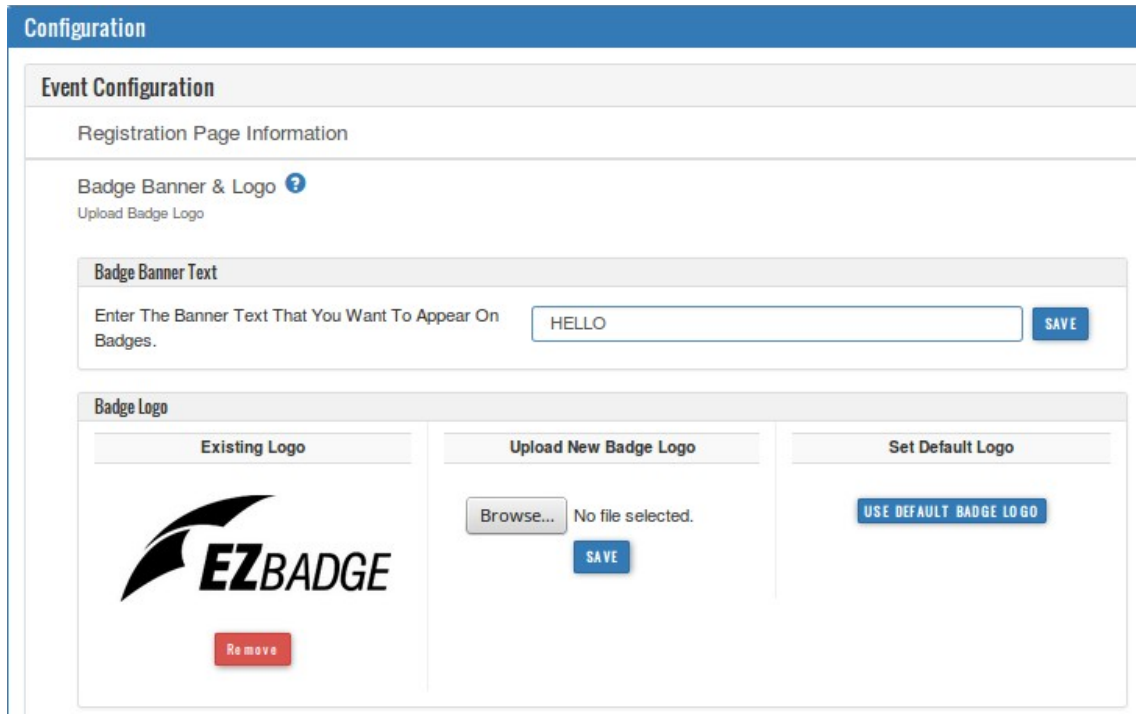The Checkbox radio button causes a form to appear that contains eleven text fields.

The one at the top is used to enter a label for the set of checkboxes. Any checkboxes for which this label is blank will not be displayed. The other text fields are labels for the selection checkboxes. Any selection checkboxes for which the label is blank will not be displayed.

Click on Close to update the badge information. If a checkbox field is to be printed, only the label or labels selected by the guest will be displayed on the badge.

Badge banner and logo

Clicking on this link displays a page that controls the text and logo displayed on the badge.

The text in the textbox in the Badge Banner Text area of the display will be printed on all badges on the top line of the badge next to the logo. After the text to be displayed on all badges has been entered, click on the SAVE button under this textbox to update the badge information. The updated text will be active the next time a guest prints a badge.

The three sections of the Badge Logo area of the display control the display and update of the logo that will be printed on the badges. The badge logo is a graphics file in one of the following formats:

- png
- jpg
- gif
- bmp
- pdf

Chose an image file that looks good when printed in black and white and when scaled down to a very small size for the badge (about 300X200 pixels). The **EZBadge** system will automatically scale and format the file that you provided to the correct size for printing on all badges.

The Existing Logo section of the Badge Logo area of the display displays the current logo. To have badges printed without a logo, click on the Remove button in this area.

The Upload New Badge Logo section of the Badge Logo area of the display allows the replacement of the existing badge logo with a new logo. To replace the logo, click on the Choose File button. This opens a file chooser window. In this window navigate to the desired file on your computer, select it and close this display. You can also "drag" a file to this area. The Upload New Badge Logo section will be updated with the name of the file. After clicking on the SAVE button in the Upload New Badge Logo section, the Existing Logo will be replaced by the new logo. (Note: on some browsers, you may need to refresh the page.)

The Set Default Logo section of the Badge Logo area of the display allows the replacement of the existing badge logo with the **EZBadge** system logo. To replace the logo, click on the USE DEFAULT BADGE LOGO button. The Existing Logo will be replaced by the the **EZBadge** system logo.

> Note: some browsers cache the old logo files and hence do not show changes immediately. Use a different browser, private window, incognito window or clear the browser cache to see the latest changes.

All badge logo changes will be active the next time an guest prints a badge.

Registration page banner and logo
Clicking on this link displays a page that controls the text and logo displayed on the registration page.

The text in the textbox in the Registration Page Banner Text area of the display will be displayed at the top of the registration page above the logo

and the registration fields. After the text to be displayed on the registration form has been entered, click on the SAVE button under this textbox to update the registration page information. Changes to the registration page banner will be active the next time an guest connects to the **EZBadge** system or refreshes the registration page.

The three sections of the Registration Page Logo area of the display control the display and update of the logo that will be displayed on the registration page between the banner text and the registration fields. The Registration logo is a graphics file in one of the following formats:

- png
- jpg
- gif
- bmp
- pdf

The Existing Logo section of the Registration Page Logo area of the display displays the current logo. To have the Registration Page without a logo, click on the Remove button in this area.

The Upload New Registration Page Logo section of the Badge Logo area of the display allows the replacement of the existing registration page logo with a new logo. To replace the logo, click on the Choose File button. This opens a file chooser window. In this window navigate to the desired file, select it and close this display. You can also "drag" a file to this area. The Upload New Registration Page Logo section will be updated with the name of the file. After clicking on the SAVE button in the Upload New Registration Logo section, the Existing Logo will be replaced by the new logo.

The Set Default Logo section of the Registration Page Logo area of the display allows the replacement of the existing registration page logo with the **EZBadge** system logo. To replace the logo, click on the USE DEFAULT LOGO button. The Existing Logo will be replaced by the the **EZBadge** system logo.

Changes to the registration page logo will be active the next time a guest connects to the **EZBadge** system or refreshes the registration page.

> Note: some browsers cache the old logo files and hence do not show changes immediately. Use a different browser or clear the browser cache to see the latest changes.

Network configuration

Network Configuration allows you to change how the Wi-Fi network works and also the Ethernet network.

The Wi-Fi network name is the Wi-Fi network used to connect any device to the **EZBadge** system Wi-Fi network. The default name is **EZBadge**. To change this, enter the new name in the Enter The Wi-Fi Network Name (SSID) text field. The new name must be eight characters or more in length and be alphanumeric characters only.

The Enter Wi-Fi Security Password text box is used to password protect the **EZBadge** system WI-Fi network. If this is set, it must be supplied to all devices before they are allowed to connect to the **EZBadge** systemWi-Fi network. If no password is set, the EZBadge network is open for all users (the default setting).

The "How Do You Want To Use The Ethernet" selection drop box is used to configure the Ethernet port. The configuration settings are:

- **Do Not Use Ethernet** – The Ethernet port is disabled.
- **Register Guests** – The default setting. Devices connected to the Ethernet port have the identical functionality as devices connected to the **EZBadge** system Wi-Fi network. Ezbadge acts as the host and provides IP addresses (DHCP) to other devices connected via Ethernet.
- **Connect to Another Network** – Allows **EZBadge** to be connected as a client to other networks. This is useful only for product support and should only be used under direction of **EZBadge** support.

The default setting is **Register Guests**. With this setting you can connect a single device to the Ethernet port or multiple devices through an Ethernet switch. Any of these devices can be used to register guests or administrer the **EZBadge** system.

Support Mode selection drop box is used only when directed to by **EZBadge** system support. The settings are:

- Support Mode OFF – The default setting. In this mode the **EZBadge** system is secure.
- Support Mode ON – This mode makes the **EZBadge** system is unsecure. **Only use this mode when directed to by EZBadge system support.** Do not use this mode under any other circumstances.

Click on the SUBMIT button and then reboot the **EZBadge** system from the OPETRATION page to activate them.

Login password

Login Password allows you to set the Administration password.

The default password is "**badgeez**". To change this, enter the new password in the text field and click the SAVE button. Once changed, the new password is active for all subsequent logins. (System restore resets password to "badgeez".)

Software upgrade

The Software Upgrade allows you to upgrade the **EZBadge** system to the latest software revision.

The initial display gives a set of instructions. The Upload Upgrade File tab is used to upload the file that contains the latest version of the **EZBadge** system software. The Apply Upgrade tab is used to update the **EZBadge** system software.

To start the software update procedure, go to and download the latest software update to your device, if one is available.

The next step is to click on the Upload Upgrade File tab. This opens the Upgrade select file form.

To move the software update to the **EZBadge** system server, click on the Choose File button. This opens a file chooser window. In this window navigate to the desired file, select it and close this display. You can also "drag" the file to this area. The display will be updated with the name of the file. After clicking on the Upload button, the display will be updated with a status message and an Apply Upgrade Now link.

You can click in the Apply Upgrade Now link to display the Apply Upgrade page or at a later time click on the Apply Upgrade tab to display this page.

Once on the Apply Upgrade form, you can click on the Apply button to apply the update contained in any particular file or click on the Delete button to delete an upgrade file. Applying an upgrade, will typically cause the system to reboot. You must wait for the upgrade to complete. Do NOT remove power during the upgrade. This can render the system inoperable and must be returned to EZBadge for repair.

System restore

The Full Reset To Factory Defaults link restores the **EZBadge** system to the default configuration. All event and system configuration, custom logos and registration data stored on the **EZBadge** system will be lost. The network will be reconfigured to the factory defaults and the passwords will be reset to the factory defaults. The login password is restored to the default "badgeez". Any software upgrades will not be changed.

5.4 Operation

To get to the Operation page, click in the OPERATION button.
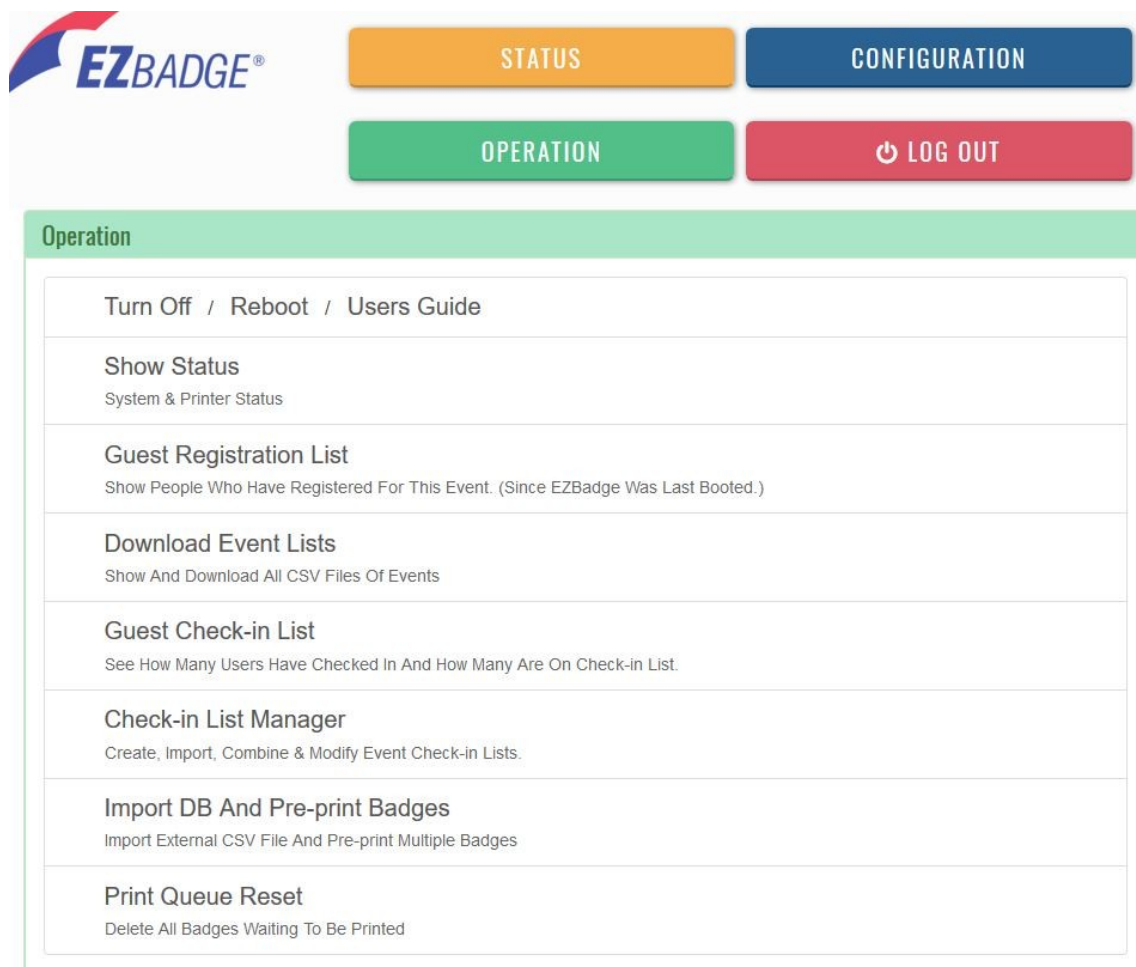
The Operation area provides the controls and information used for an event and to stop and restart the **EZBadge** system.

Turn off

To turn off the **EZBadge** system, click the Turn Off link. The **EZBadge** system will display a confirmation page and then the administration logon page.

Reboot

To reboot the **EZBadge** system, click the Reboot link. The **EZBadge** system will display a confirmation page and then the administration logon page. After approximately 1 minute, the **EZBadge** system will be operational.

Users guide

To display the **EZBadge** system Users Guide, click the Users Guide link. The **EZBadge** system will display the **EZBadge** system Users Guide.

Show status

To display the status of the **EZBadge** system, click the Show Status link. The **EZBadge** system will display a status page that includes the status of the printer and the number of registrations. (Same as Show Status under the Status tab.)

Guest Registration List

To display a list of the current registrations in the **EZBadge** system, click the Guest Registration List link. The **EZBadge** system will display a status page that includes the number of registrations and a table that contains the first and last names of the registrants.

Guest Check-in List

This allows displaying of the same information as the Guest Registration List which includes guests who have checked in and who have registered on-site.

You can also display the checkin list that is used to check in guests (e.g. the pre-reservation list)

Download Event Lists

Each time a guest registers, an entry is added to a file that can be of use to extract information about the guests. Each time the **EZBadge** system is started up, the first person to register creates a new file. All subsequent registrations are added to this file. Each entry contains all of the information supplied on the registration page. The registration files are in csv format and once exported can be viewed and modified with a spreadsheet.

To download and manage the registration database of the **EZBadge** system, click the Show Download Event Lists link.

By clicking on the ⊕ icon, the data in the selected registration database file is displayed in a separate browser window.

By clicking on the ⬇ icon, the selected registration database file is downloaded to your device.

By clicking on the [icon], selected registration database file is converted to a pdf and displayed in a separate window. This can then be printed or downloaded to your device if your device allows these operations.

By clicking on the [icon], the selected registration database file is copied to a flash drive that has been inserted into one of the USB ports on the **EZBadge** system. Upon completion of this operation a status window is displayed with the results of the transfer.

By clicking on the [icon], a confirmation display will appear. After confirmation, the selected registration database file will be deleted from the **EZBadge** server.

Print queue reset
To clear the **EZBadge** system print queue, click the Print Queue Reset link. The **EZBadge** system will display a confirmation page that includes the status of the printer.

Guest Lists

Format of CSV Files
Files that are uploaded for use in the Check-in feature or Pre-Print feature must be in a Comma Separated Values (csv) format. Consult documentation for spread sheet program for instructions on how to export your guest list file in csv format. **EZBadge** support can not provide help in doing this.

> Hint: If the file is supplied in a different format than .csv, such as .xlsx, you can easily convert it to csv format by opening it with your spreadsheet program (e.g.: Excel) and "save as" in .csv format.

The first row of the file must be a header that identifies the contents of the each column. This information will be used to match each column in the exported file with the correct field in the current registration configuration.

The pre-registration csv file can be generated from a database extract, or by entering the information into a spreadsheet. Provided that the resulting file is in the csv format and has a valid header row, the **EZBadge** system will attempt to import the file.

> Hint: You can see what **EZBadge** system is expecting by examining the header in a event list file (see: *Download Event Lists* above) produced when guests print badges. The columns identified there match the registration page info you have defined (see *Registration Page Information* above). You will "map" these columns to columns in your pre-registration file in the steps described below.

If needed, the external export csv file can be modified to satisfy the needs of the **EZBadge** system. **EZBadge** support can not provide help in doing either of these tasks.

When preparing the csv extract, the file must have:

- All columns should have a single comma separators
- All text fields should be quoted with straight quotes
- All the rows should have the same format (e.g." number commas)
- Should be plain ASCII text, no special characters.

Guest Check-in List Manager

The check in feature allows you to upload a list of pre-registered guests or a membership list before an event and use this as a check-in list to allow guests to simply click on their name and then print a badge. Their information is also saved into an "event" list file spread sheet along with guests who register on-site so that you have a full record of all who actually attended.

Managing the check-in list allows you to upload one or more lists and merge them into one check-in list. You can also merge files from previous events that are stored on EZBadge. This allows accumulating information for repeat guests.

> Hint: managing guest lists is best done on a computer rather than a tablet or phone.

Management is done from the Check in List Manager page.

The feature must be enabled in order for the check-in feature to work. Use the "Check-in / Autocomplete" checkbox to enable.

You can upload csv files using the "Upload New File" button at the bottom of the page.

Here is an example guest list/

	A	B	C	D	E	F	G
1	First Name	Last Name	E-Mail	Membership	Title	Company	Phone
2	John	Adams	jadams@aco.com	Guest	Sales Associate	A Corp	215 999 1234
3	John	Barkley	jbarkley@bco.com	Member	PR Manager	B Corp	602 123 4567
4	John	Smith	jsmith@cco.com	Staff	Engineer	C Corp	415 888 2233
5	John	Williams	jwilliams@dco.com	Guest	Music Director	D Corp	408 777 4455
6	Amanda	Adams	amanda_adams@eco.com	Member	Marketing Comm	E Corp	615 321 9876
7	Brenda	Barkley	BrendaBarkley@fco.com	Staff	Sales Associate	F Corp	421 333 4545
8	Penny	McMurray	PennyM@gco.com	Guest	VP Sales	G Corp	432 444 5667
9	Molly	Disessa	MollyCD@hco.com	Member	VP Operations	H Corp	244 912 8877

Once your csv file(s) have been uploaded, they will show in the list of available files.

You can either add files to the existing check-in in list, if there is one, or create a new list by clicking on "Clear List".   Select the files to be added by clicking on the checkbox. You can also view, download, or delete files.

> Note: Deleting event files from previous events on the list manager page will be permanently deleted them from the system. Use caution.

> Note: Whenever the configuration of the registration page is changed, the check-in list is automatically cleared and must be recreated.

Click on "CREATE NEW CHECK-IN LIST OR MERGE CHECK-IN LIST FROM SELECT FILES" to create a new check-in list from the selected files. Each selected file may need to be "mapped" to match columns in the csv file to the configuration of the registration page.

Note: If you are combing multiple files into one check-list, then each file needs to be mapped and then verified separately. Each one is shown on this page.

The "Check-in Lists Field Mapping" page is displayed below. The example displayed shows mapping required when creating a checklist from one file.

Across the top are the fields you have previously defined on the registration page (see "Registration Page Info, page 19).

In the row that says "Match file columns", click on each choice box and the columns from your imported .csv file are shown in a "dropdown" list. Select the column that best matches the field you previously defined on the registration page, and it will be mapped. If you do not want to use this field, just set it to "None" (the default).

> Hint: you may need to scoll the dropdown list to see all columns from your imported .csv file.

When done mapping the imported file to the registration page, click "Verify". This will read the entire imported file and check that it is formatted correctly. Any error messages should be corrected and re-mapped.

Check boxes take special consideration. Some files exported from other systems, such as Eventbrite, may include data from "checkboxes". These allow the user of those systems to enter multiple selections for one item. When these selections are converted into a spreadsheet file, different encoding methods may be used. Some systems may simply include the all the selected choices within one comma separated column, separated by a delimiter such as "|". This is a multi-value field. Other systems may provide a separate comma separated column for each possible choice. You need to examine the file:

> 1) Determine if checkbox data is present in the file.

> 2) If checkbox(es) are present, determine how the choices are represented.

1. If checkboxes are present and represented by a separate comma separated column for each checkbox choice, simply select the matching choices in your registration page configuration. Do not check the box: "Checkbox values are combined in 'multi-value' fields".

2. If checkboxes combine the choices into one multivalue field, check the box: "Checkbox values are combined in 'multi-value' fields" and specify the delimiter character (usually |). When mapping the checkbox choices for a particular checkbox, select the SAME checkbox name from the dropdown list for each choice. EZBadge will match them up by comparing the choices in the spread sheet to the choices configured on the registration page.

> **Note:** the choices configured registration page must be the same as the choice in the spreadsheet (or at least the first part of the choice text).

When each of the the files requiring mapping has been mapped, click on "CONTINUE – MAPPING COMPLETE". This will cause the selected files to be merged into the check-in list, and the check-in feature is operational on the registration page: names in the check-in file will be matched to names typed in on registration page.

> **Note:** If there are duplicate entries with the same name and e-mail address, but the other fields are different, these entries will appear in the check in file and users will see their name multiple times. Which ever one they select will be used. (They can then select another if desired.)

You can also download the check-in list (checkin.csv) file using the "DOWNLOAD CHECK-IN LIST" button at the bottom of the page.

Once this merging step is complete, the registration page will be operational.

Caveats and considerations:

For guest list spread sheets that have many unneeded columns, it may be more convenient to make a copy that has only the columns needed to fill in the registration page. This simplifies matching the columns of the spread sheet to the EZBadge configuration.

Avoid the use of special characters such as ":" in the configuration of the registration page. It can cause conflicts that prevent those fields from being automatically filled in at check in time.

Import DB and pre-print badges

To import a database and pre-print badges, click the Import DB And Pre-Print Badges link.

To print badges for guests who have pre-registered on an external system, the information captured must be downloaded from the external system first. This file must be in .csv format, as described above.

To import the file to the **EZBadge** system server, click on the Choose File button. This opens a file chooser window. In this window navigate to the desired file on your computer, select it and close this display. The display will be updated with the name of the file. After clicking on the IMPORT button, the column mapping form will be displayed.
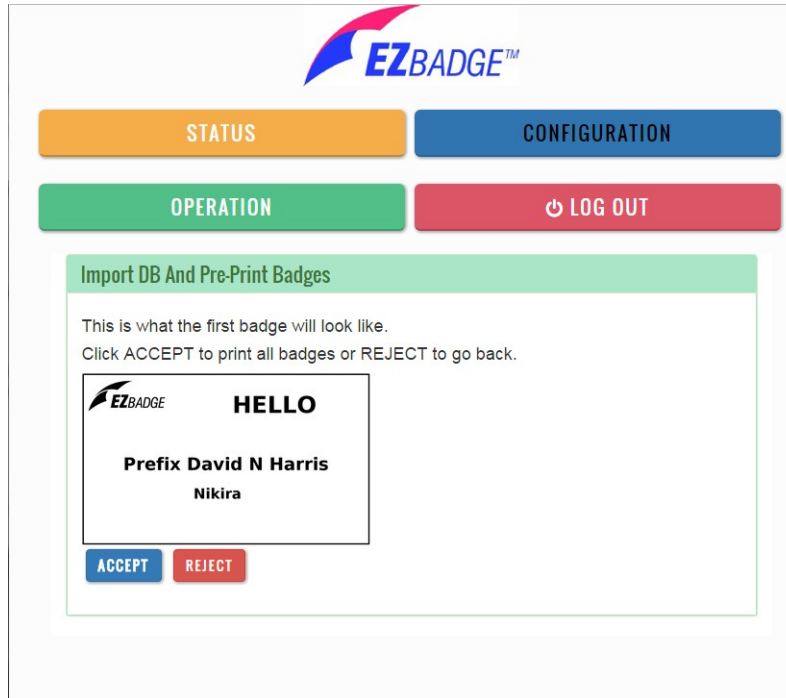
The first line of the display identifies the active fields with the **EZBadge** system identifier for the current registration page. The second line presents the label, if any, of the field that is shown to the guests when they register. The third line is a set of selection drop boxes. These contain the column headers from the imported csv file. Use this information to "map" the columns in the imported file with the labels presented to the guests on the registration page.

> Note: if the registration page info is changed, you need to do this mapping process again or the badges may not print correctly.

After all associations have been made, click on the PRINT FIRST BADGE button. This will open a print preview form.

If all is correct, click on the Accept button. All badges will print and a confirmation form will be displayed. If not click on the REJECT button and import existing database file form will be displayed.

5.5 Log out
To logout of the administration pages, click the LOG OUT button. This causes the **EZBadge** system to display the administration login web page.

6 In case of difficulty

6.1 Operational problems

Cannot find the Wi-Fi network
Make sure the **EZBadge** has power. Check the status lights on edge of the **EZBadge** server. The red light is lit when receiving power, and a green one may flicker occasionally. Check that other devices can see the Wi-Fi network. If other devices can see the network, try moving closer to the server.

Cannot connect to the Wi-fi network
If your device can see the EZBadge Wi-Fi network and all other devices cannot connect to it, then most likely, security has been turned on and the correct Wi-Fi password needs to be supplied to all devices.

If your device can see the EZBadge network and other devices can connect to it, try moving the device closer to the **EZBadge** system and, entering the Wi-Fi password if required.

> Note: Some devices connect Wi-Fi only if they detect that the Wi-Fi network has access to the public Internet. Since the **EZBadge** system does not have any Internet access, these devices can not be used with the **EZBadge** system.

Disconnects from Wi-fi network
Some browsers and operating systems will cause the laptop or tablet to occasionally disconnect from the **EZBadge** server. They may do this because they are trying to reach the public Internet and EZBadge is a "captive system" and does not connect to the public internet. Reconfigure your browser and/or operating system to disable these features. (How to do this is depends on your device and its configuration. EZBadge can not provide instructions.)

Security Warnings
EZBadge is a "captive system" and does not connect to the public Internet. Some laptops or tablets provide warnings that the network is not secure because they are unable to connect to the public Internet. Since **EZBadge** does not connect to the public network, no other systems on the Internet can get to your devices. This type of security is not necessary and the warnings can be ignored. As with any Wi-Fi network, others within the local area can still see your device. Good practice is to use a network firewall and disable any network sharing.

Registration page does not display automatically
Your browser may be trying to go to a secure site, that is one whose URL begins with "https://". This does not work. Use http:// only. Depending on your browser, this may be the default. If EZ.com does not work, try http://ez.com If this does not work, you may have another network also active, such as a cellular data/e connection. Use **10.0.0.1/index.html**

A security certificate warning displays
This occur son some browsers if the user enters a URL beginning with "https://" instead of "http://". Because the **EZBadge** system by default does not connect to the internet it is safe to ignore this warning. Alternatively use the url **EZ.com** to access the **EZBadge** system. Be sure to use http://EZ.com

Name badge tears
Have the guest re-register again. This will be identified in the database as a double entry.

Badges do not print
Validate that the printer has power. This is indicated by the green light on the printer being illuminated. Validate that the printer **EZBadge** system are connected by the USB cable. Validate that the printer has paper and the paper feed is not jammed. The Show Status and Health Check on the Status form can be used to identify issues. If needed, the printer queue can be reset

from the Operations form and the guests re-registered. These will be identified in the database as double entries.

Lost Admin Password – Factory defaults.
There is no bypass for a lost password. The system can be reset to factory defaults, losing all configuration, guest lists and past event files.

To reset to factory default settings, connect to the EZBadge WiFi. Enter this URL in the browser:

http://10.0.0.1/admin/backdoor_restore.php

6.2 System problems
The **EZBadge** server contains lights that indicate its health.

- RED on steady – server has power
- GREEN varied flashes – server computer is operating

The green light flashes when the internal SD memory card is accessed. This flashes rapidly when the system is starting up and occasionally as the system is used.

The **EZBadge** software detects some faults when it is powered up, and tries to recover from these faults. It attempts to preserve configuration information. The recovery process takes up to 5 minutes. The green light will flash rapidly during this process. If you do not see the **EZBadge** system Wi-Fi network within 5 minutes, contact **EZBadge** support at support@ez-badge.com

When the Ethernet port is connected to a LAN, some additional lights will appear next to the Ethernet socket. They light to indicate that the port is live, and will flash to show activity. The Ethernet supports 100mb

7 Security

Because the **EZBadge** system is not connected to the Internet and contains no highly sensitive information, such as credit card numbers, it is not considered a secure system. Accordingly, security of this system is minimal. It should not be used to store information that is required to be protected by federal or state laws or by company operating procedures.

8 Warranties

EZBadge does not support any use or modification to hardware or software beyond that supplied by the **EZBadge** system functionality. Any unauthorized changes to the hardware or software are not supported and invalidate the warranty.

The **EZBadge** system supplied has a one year warranty from EZBadge.

9 Technical information

The hardware is a Raspberry PI (3B) single board computer plus a MicroSD flash memory card.

The server power supply may be operated on 100-240Vac 50/60Hz power sources.

The Brother QL-600 printer may only be operated on 120Vac 60Hz (1.7a).

The operating system software is derived from the Raspbian (jesse) Linux distribution. Linux kernel legal disclosures are available from: https://www.kernel.org/category/about.html