# Designing Card Templates Tutorial

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Design a Card Template

Using Aurora's Manage Global Card Templates editor and a card printer interfaced with the Client software, you can design and print photo ID badges and credentials that identify individuals in your company or organization.

This tutorial outlines designing a basic card template using the Manage Global Card Templates editor, then opening the template from within a credential record and printing a card. More extensive information about creating templates and printing cards is available in Aurora's help.

Manage Global Card Templates Editor

The Manage Global Card Templates editor has a group of tools to draw objects, insert text, import individual photos or background images, insert specific credential fields, or place barcodes on the template. You can create any number of templates to distinguish departments or security levels depending on your organization's requirements.

Manage Global Card Template Editor
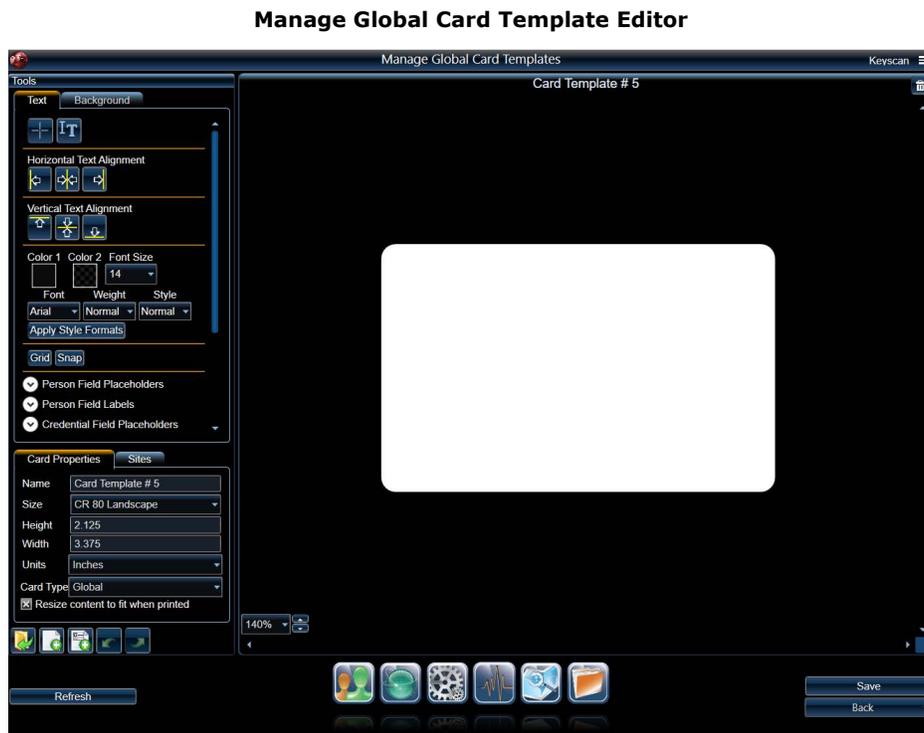
Inserting Database Fields

One of the advantages of designing a template is that you can insert the following database fields on a template:

- Person Fields
- Credential Fields
- [Common] Optional Fields
- Site Optional Fields
- Visit Fields

Inserting the desired database fields on the template automatically populates the credential holder's information when the template is loaded in the Edit Person screen when printing a photo ID badge or credential.

In the examples below, the illustration on the left is the actual template viewed in the Manage Global Card Template editor. The template has had three database fields inserted, two Person Fields – Given Name and Surname – and one Optional Field – Department. When opened in the Edit Person screen as shown in the example on the right, the person's given name, last name and the department are automatically populated in the template.

Example of a Template	Example of an ID Badge
Photobadge template created in the Manage Global Card Template Editor	ID badge printed with the template opened in the Edit Person screen

About the Tutorial

This tutorial is intended to give you some basic instructions on using the various tools and functions for designing a template and printing a badge or credential. Part of the instructions will call for inserting your company logo on the template. You will need an image file of your company logo, such as a JPEG or BMP image. We suggest you use a photo editor application to pre-size your company logo rather than scaling it to size in the Manage Global Card Template editor for better printing results on the photobadge.

Steps to Design a Card Template and Print a Badge

1. Open the Aurora Client and log on.

2. From the Client main screen, select the Settings button > Manage Global Card Templates.

3. From the Manage Global Card Templates editor screen, click on the New Card Template button.

4. To the right of Size click on the ▼ symbol and select Landscape (CR-80) from the drop down list.

   - CR-80 – 3.375" x 2.125" (industry-standard size for proximity cards)
   - CR-79 – 3.303 x 2.051" (PVC adhesive-backed cards designed to be affixed to CR-80 proximity cards – the slightly smaller CR-79 has a recessed edge making it extremely difficult to peel off the CR-80 card)
   - Custom - if using a card with dimensions other than CR-80 or CR-79, choose custom and specify the dimensions of the card in the Height and Width text boxes.

5. In the Name box below Card Properties, enter a name for the template.

   - In cases where you are going to create multiple templates to distinguish different departments or distinguish employees from visitors etc., use file names that will assist in easily recognizing the various templates.

6. Leave the Units field on inches.

7. Leave Card Type on Global.

   - The selection of Card Type, global, site or visit affects which of the database fields are available for insertion on the template.

8. Click on the Save button.

9. From the Manage Global Cards Template editor, select the Background tab.

   - If at any time you make a mistake during the tutorial, click on the Undo button.

10. Below the template work area, we're going to adjust the view. Click on the symbol to the right of the current magnification and select 200% from the drop down list.
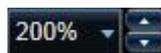
11. Click on the square below Color 1 to open the palette and select a colour by dragging the circle to the desired hue. To change colors, drag the arrows up or down on the color selector on the right. The slide at the bottom adjusts the color opacity. Keep the slide to the extreme right to retain it at 100% opacity.
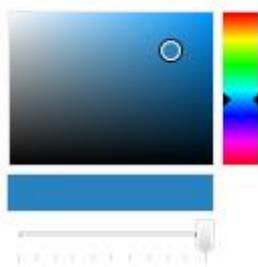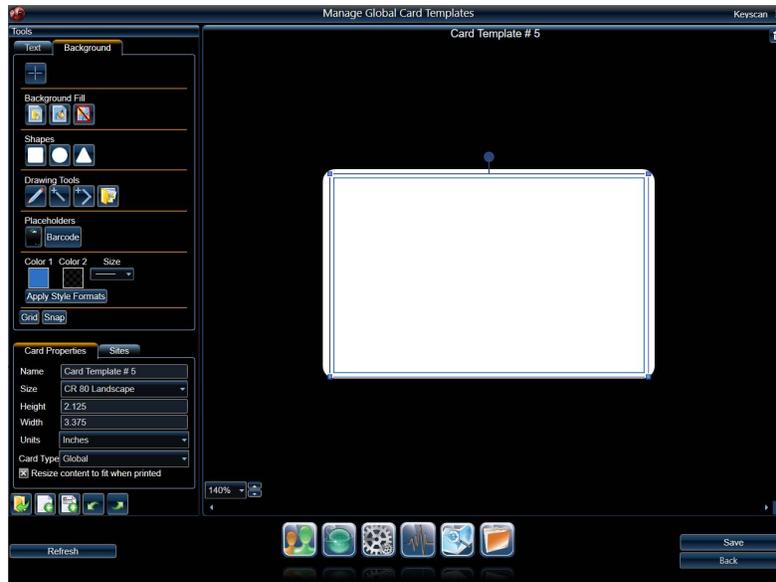
12. Click on the down arrow below Size and select the thin line at the top of the drop down box. (You may have to click on the editor screen to close the color palette before you see the Size heading.)

13. Click on the square button under Shapes.

14. Position the cursor inside the upper left of the template work area. Click and drag toward the bottom right. The rectangle should now be just inside the template evenly spaced around the edge. You can re-size the rectangle by grabbing and moving one of the boxes or change the color by clicking on Color 1 and selecting another colour from the palette. The rectangle must be selected to change any of its properties.

15. With the rectangle still selected, click on the down arrow below size and select the third line thickness to make it heavier.
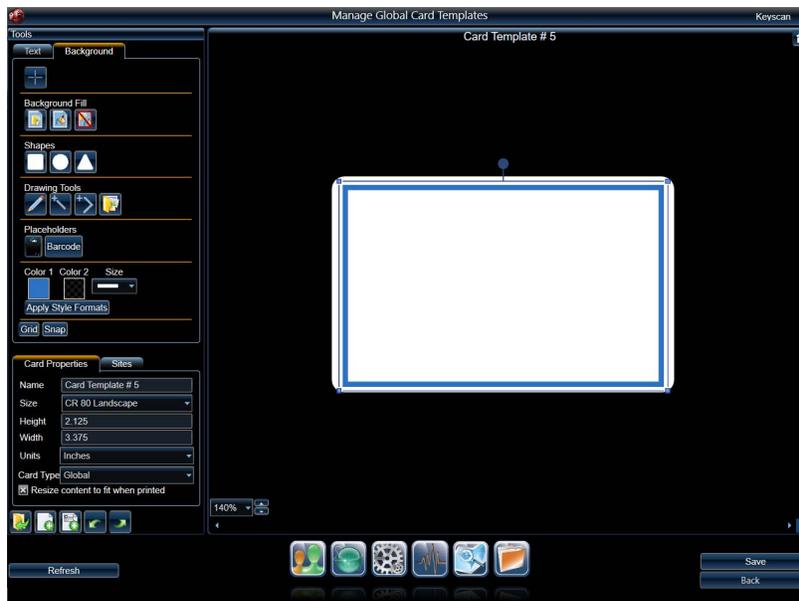
16. Click on the Add Photo button below Drawing Tools.

17. From the Open dialog box, navigate to the folder where you have the image of your company logo (JPG or BMP) and select the file. You may have to change Files of Type to see the file name of your logo. If you do not have a logo you can by-pass inserting a logo and go to step 20.

18. Click on the Open button.

19. With the logo still selected, position it inside the upper left of the rectangle. If the logo is too large or too small you can scale it by holding down the Shift key and dragging one of the corners to resize it. You may notice degradation in the quality of the image after it has been scaled. We suggest that you use a photo editor to pre-size the image before you load it into the Manage Global Card Template editor. You may have to experiment with pixel dimensions until you reach the desired image size.

   • All images inserted on the template should be at least 300 dots per inch (dpi) for best printing results.
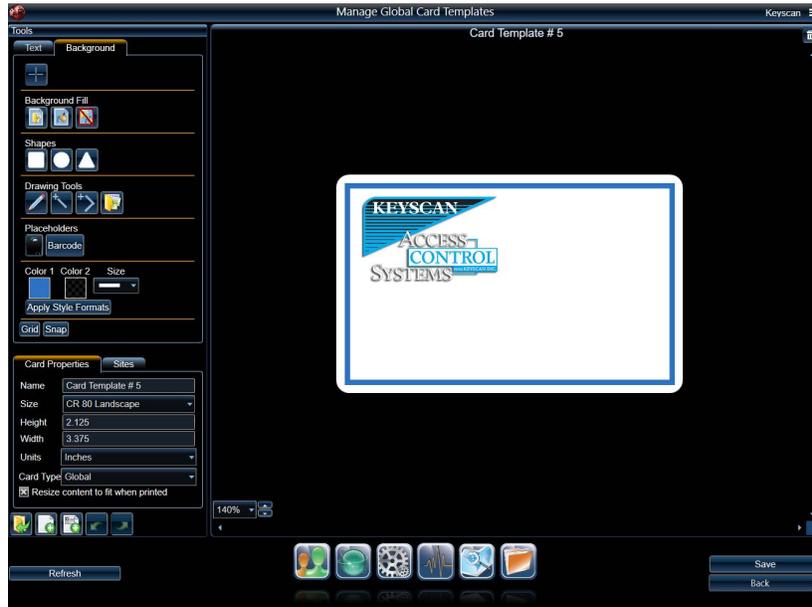
20. Click on the Personal Photo Frame tool.

21. Move the cursor on to the template near the top and click. The Personal Photo Frame is inserted on the template.

22. With the frame selected, hold down the Shift key while you click and drag the lower left box on the photo frame to reduce its size to the approximate dimensions shown in the following screen capture.

   • You must have photos attached on individual credential records otherwise this area of the badge will be blank when it's printed.

23. With the Photo Frame still selected, move it so it is centered between the top and bottom of the template, but near the right side of the border you created earlier.
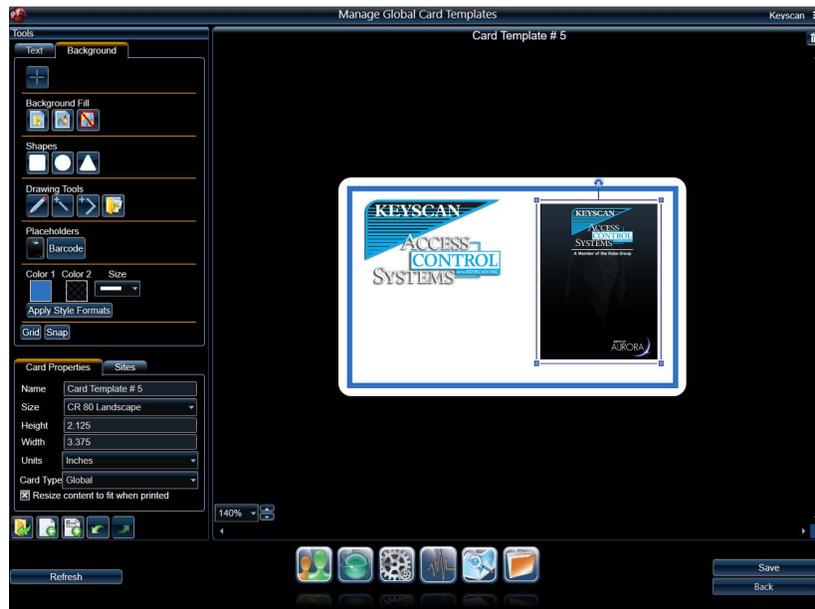
24. Select the Text tab under the Tools menu.

25. Click on the ▼ symbol below Font Size and from the drop down list, select 20.

26. Click on Person Field Placeholders to open the list of fields.

27. Position the cursor over Given Name. You will notice a blue marquis. Click and drag the cursor and position it on the left below the logo. The person's given name will be automatically inserted when you print a badge.

   • If you do not see a small rectangle below the cursor while dragging the cursor to the template work area, release the mouse and try selecting and dragging Given Name again. This applies to selecting and dragging any database field.

28. Position the cursor over Surname. Click and drag the cursor and position it below the person's Given Name. The person's surname will be automatically inserted when you print a badge.

29. Now you are going to insert an optional field. We have created a Common Optional field in our Aurora Client software called Department which we are going to insert below the person's Surname. If you have not created any common optional fields in your Aurora Client software or you have different common optional field names, you can either bypass this step or insert another field for the purpose of this tutorial.

30. Click on the ▼ symbol below Font Size and from the drop down list and select 12 so the font is smaller than the fonts used for the Given Name and Surname.

31. Click on Optional Field Placeholders to open the list of fields.

32. Position the cursor over the Optional Field. You will notice a blue marquis. Click and drag the cursor and position it below Surname.

   • When inserting database fields, you may have to extend the width of the boxes to accommodate fields with longer names or data entries. To extend the width of a database field, select it, position the cursor over the right or left side of the marquis, when the cursor changes to a double arrow, click and drag expanding the box in a left

or right direction. Refer to the Aurora help for more scaling an object.

33. Click on the Grid tool to show the grid on the template work area as shown in the following screen.


34. Individually select each of the name fields and the optional field and position them so they are aligned and spaced similar to the example above.

35. After you have aligned the database fields, click on the grid button to hide the grid.

36. Select the Text Editor tool.

37. Position the cursor on the left side near the bottom of the template work area. You are going to create a text box to enter your company name and address.

38. Click and drag down and to the right until the text box is the approximate size of the one shown in the example below.
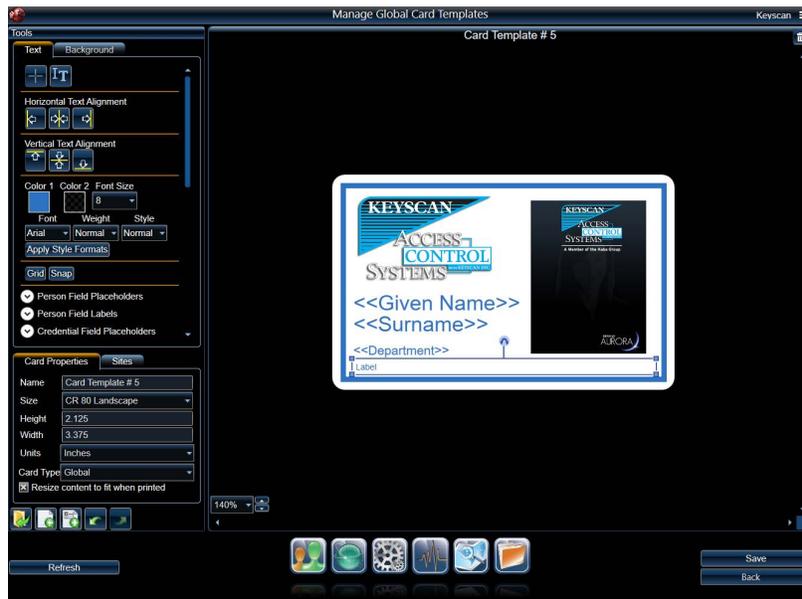
39. Place the cursor in front of the L in Label. The cursor changes to an I. Click and drag over the word Label and press the Delete key to clear the text box.

40. Enter the name and address of your company.

- If the text box is not wide enough, position the cursor over the right side of the text box and click and drag to re-size the width.

41. With the text box still selected, click on the down arrow below font size and select 10 from the drop down list.

- You can experiment by trying different font sizes and or selecting different hues and colors from the Color 1 palette.

42. Click on the Save button.

43. We have now designed a basic photo ID template. You can experiment with the various tools to get a better grasp of how they work. Remember, you can also refer to the help in Aurora for more information.

44. Once you have finalized the template design, ensure that you click on the Save button to save the template, and then select the Exit button.

45. From the main screen, select the Manage People button > Manage People.

46. Select a credential record from the Manage People list.

  • This should be someone who has a photo image attached to his or her record.

47. Double click on the credential record to open it.

48. Ensure the Credential Information tab is selected.

49. Click on the printer icon to the left of the Credential Information heading.

50. From the Print Credential dialog box, click on the down arrow opposite Template and select the template you created in the drop down list.

  • The Print Credential dialog box shows a preview of the template with the person's information and photo image loaded.

  • If you did not insert an optional field or the field does not have any data in the credential record, you will not see any information displayed below the surname.

  • If you do not want to print the template on an actual card or credential, select a paper printer instead of a card printer to see a printed version of your template.

51. Click on the OK button.

52. From the Print dialog box, select the printer if applicable, and click on the Print button.

53. Retrieve the card, credential or piece of paper printer, depending on what you printed and check how the template printed. You may have to return to the Manage Global Card Templates editor and modify the template.