HOW TO IMPORT RECORDS

FROM

IDPACK 9 FOR WINDOWS

INTO

IDPACK IN THE CLOUD

CONTENTS

Below you will find the different terms you will see throughout the documentation and application.

- **IDp9** - IDpack (Element, Business, Professional) version 9
- **IDp8** - IDpack (Element, Business, Professional) version 8
- **IDp7** - IDpack (Lite, Plus, Pro) version 7
- **IDC** - IDpack in the Cloud
- **Project** - includes all the configuration and design needed to print cards. You can create as many differently designed projects as you want!
- **Designer** - where you can choose your template and configure it.
- **Producer** - where you can create and print your cards.
- **Template** - provides predefined card designs that you can choose from. In Designer, you can change all the images, dynamic text, and static text to your liking.
- **Organization** - an organized group of people with a particular purpose, such as a company, firm, concern, operation, corporation, institution, group, establishment, consortium, conglomerate, combine, syndicate, body, agency, federation, confederation, alliance, coalition, association, movement, society, league, club, network, and confederacy.
- **Record** - unique record of information that can be printed on a card printer. You can store more information on a record (defined in the Designer Field Definition) than can be printed. This is data collection. For example, you can add the field Passport # to get the information on screen, without printing it.

The interface for IDpack in the Cloud is very similar to IDpack 9 for Windows. The Designer and Producer are still there, in fact, in Designer, the different setups are still in tabs and in Producer, there still are a badge list, badge information and print preview. If you are already familiar with IDp9, you will not have a problem moving around in IDC.

To import color codes and records into **IDpack in the Cloud** from **IDp7**, **IDp8** and **IDp9, please follow the steps below**. All screenshots from IDpack for Windows are based on IDp9, although IDp8 and IDp7 are not far different.
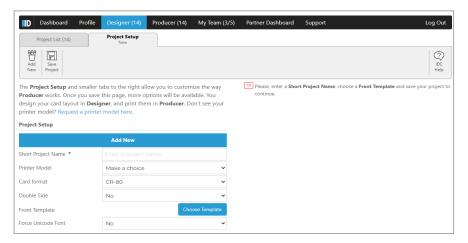
To learn more about IDC, you can look at the full documentation here: https://www.idpack.cloud/support/help/ We highly recommend starting with the **Getting Started with IDC** section.
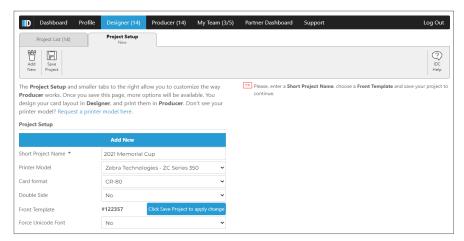
1- SETUP IDPACK IN THE CLOUD

Assuming you already have a verified **IDC Account** and can login to the **Dashboard**, this document is the next thing to look at for IDp9 users. Warning: trial versions of IDC do not include the **Import Records** features.
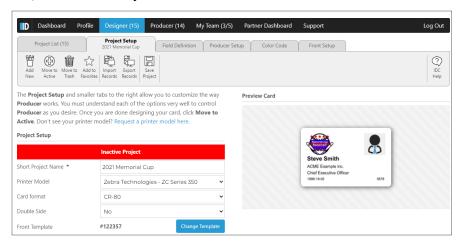
Let's begin. From the **Dashboard**, click **Designer** and create a new project by clicking **Add New** from the toolbar.

Enter the information: *Project name*, *Printer Model*, *Double-sided: No* (all can be changed later).
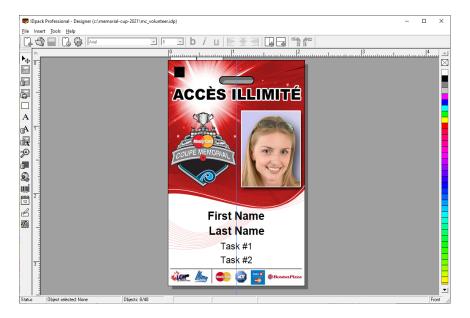Continuing, please select the **Front Template** #122357, which you can also change later.

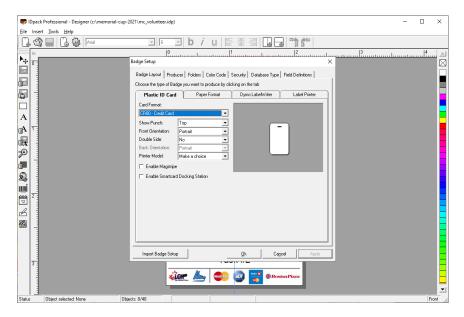When done, click the **Save Project** button from the toolbar.

2- OPEN IDPACK FOR WINDOWS (7, 8, 9)

Next, open IDp9 **Designer** as well as the badge layout you want to import into IDC. Do not close IDC because you will be using both programs at the same time.
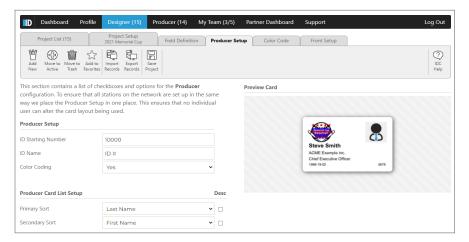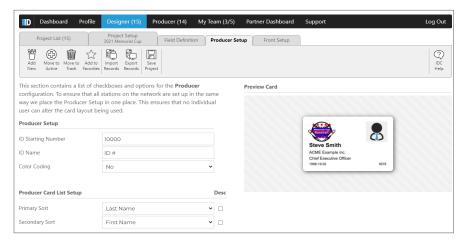

Click **Badge Setup**.

If you are using **Color Code**, jump to Step 3, otherwise you may continue.

If you are NOT using color coding in your badge design, go back to IDC, click the **Producer Setup** tab and in the **Color Coding** drop-down, choose **No** then click **Save Project**.

From now on, everything related to color coding, including the **Color Code** tab is not available to you. Although for the next screenshots in this document, the **Color Code** will be visible but please ignore it.
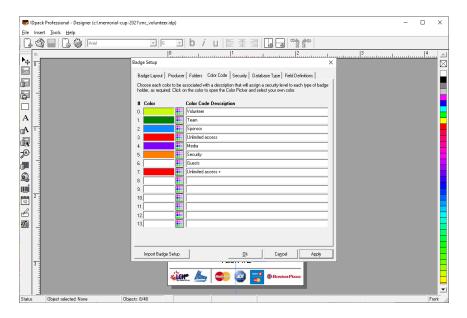

By disabling the color-coding system, you won't be able to import records with color code information. Feel free to switch it back on whenever you like.
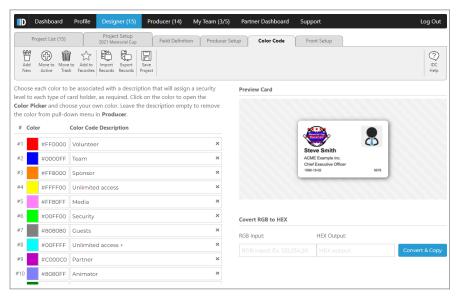
You can now directly jump to section 5.

3- SETUP COLOR CODE IN IDPACK IN THE CLOUD FROM IDP9

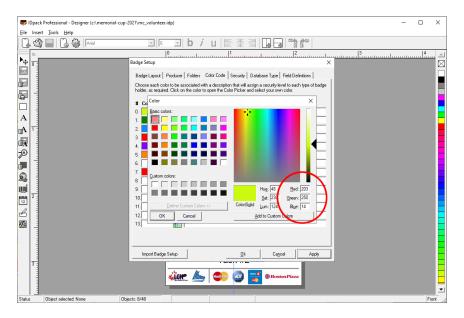In IDp9, from the **Badge Setup**, click the **Color Code** tab.

In IDC, from the **Designer**, click the **Color Code** tab and copy paste all the **Color Code Description** from IDp9 to IDC. Make sure to not alter or change the text that has been copied and pasted.

Now click **Save Project**. IDpack 9 for Windows uses a technology where HEX color codes do not exist in the color picker. As a solution, we made a tool to convert RGB color to HEX color!

4- COPY COLORS FROM IDP9 TO IDC

Go to IDp9 and click on the first color. The **Color Picker** will then pop-up.
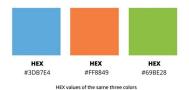

We highlighted the Red, Green and Blue (RGB) numbers to show you exactly what to copy. Don't forget to write down your RGB value, in this case: 203, 250, 14, and continue to write down all your numbers for each color (from 0 to 13).

Here, as an example, we only had to copy from 0 to 7.

Our RGB value		Write your own RGB value below	
00: 203, 250, 14 01: 0, 128, 0 02: 17, 136, 255 03: 255, 0, 0 04: 128, 0, 255 05: 255, 128, 0 06: 255, 255, 255	07: 255, 0, 0 08: ___, ___, ___ 09: ___, ___, ___ 10: ___, ___, ___ 11: ___, ___, ___ 12: ___, ___, ___ 13: ___, ___, ___	00: ___, ___, ___ 01: ___, ___, ___ 02: ___, ___, ___ 03: ___, ___, ___ 04: ___, ___, ___ 05: ___, ___, ___ 06: ___, ___, ___	07: ___, ___, ___ 08: ___, ___, ___ 09: ___, ___, ___ 10: ___, ___, ___ 11: ___, ___, ___ 12: ___, ___, ___ 13: ___, ___, ___

You can always save this page for future reference, it's always good to have backups!

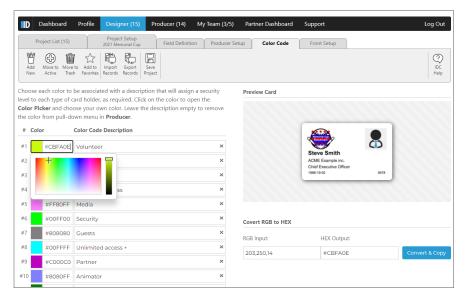|		
HEX #3DB7E4	**HEX** #FF8849	**HEX** #69BE28

HEX values of the same three colors

Tips: Designers and developers use HEX colors in web design, but what is HEX (hexadecimal color) color anyway? A HEX color is expressed as a six-digit combination of numbers and letters defined by its mix of red, green, and blue (RGB). Basically, a HEX color code is shorthand for its RGB values with a little conversion in between.

Awesome, now we know what HEX colors are! Let's go back to IDC, it's time to change the colors to match IDp9 colors. Make sure to do steps 1 and 2 for all the rows you need to copy.

1- Copy paste your RGB number (ex.: 203,250,14) from your list to the RBG input in the tool.
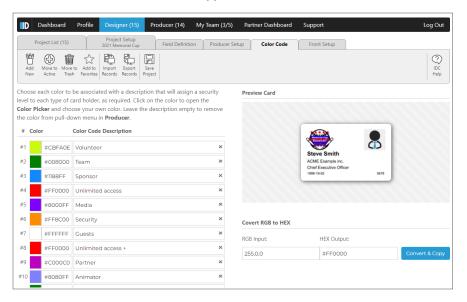

2- Click **Convert & Copy**. This will convert the RGB value into HEX and copy the HEX value onto your Clipboard. Double-click the **Color Code** input from the first row and press CTRL-V to paste the HEX value onto the input.
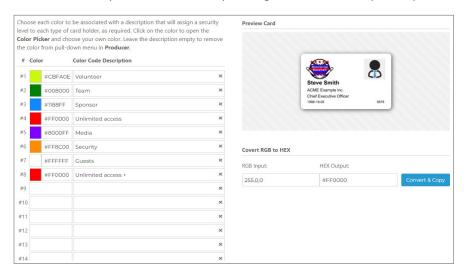

The color will change instantly. Next, move to the next row, and repeat.

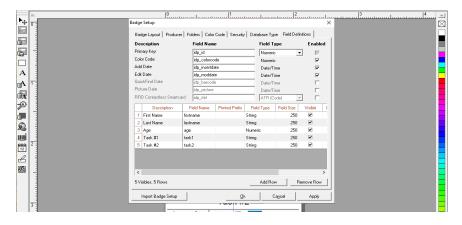Now, all **Color Codes** should match in both applications.

If there are unused rows, you can clear them by clicking the X in the description input.
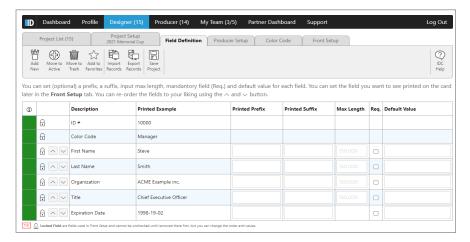

Good job! Now that the color codes are transferred, click **Save Project**. The next step is setting up the **Field Definition**. Buckle up!

5- SETTING UP THE FIELD DEFINITION

Awesome, go back to IDp9, and click the **Field Definitions** tab.
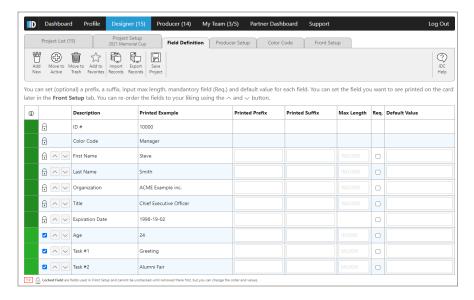

Do the same in IDC.

As you can see in IDP, you already have a few fields that come by default when the template is first selected, although they do not match the fields you have in IDp9, so, lets change that.

In the example, IDp9 contains a First Name, Last Name, Age, Task #1, and Task #2. You only need to add Age, Task #1, and Task #2, as in IDC, First Name and Last name are already filled in for you. Continuing, select the field YOU need for YOUR badge in the drop down menu below. If you cannot see the field you want, request one as we are adding new ones or be creative and select a similar field.
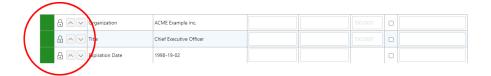

Tips: Hold down the CTRL (Windows) or Command (Mac) key to select multiple options.
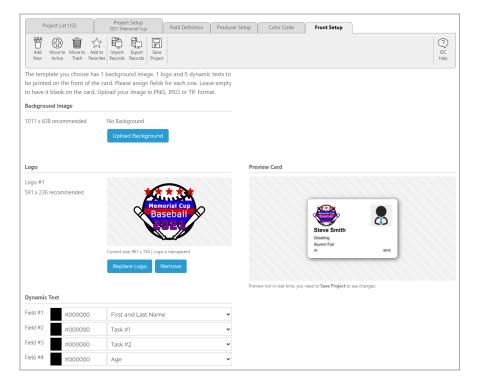
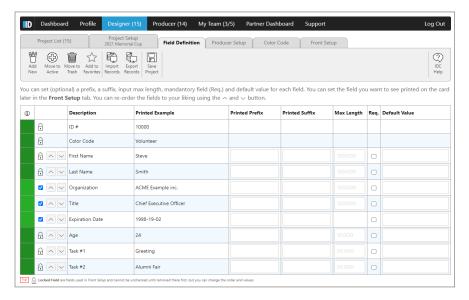Then, once you are ready, click the **Add Fields** button.

As you can see, the 3 fields that were missing are now available. Although in our case, we do not need the fields Organisation, Title and Expiration Date. You cannot remove them either as they are locked.

This is because they are in use on the front or the back of the card design. To change this, click the **Front Setup** tab and change the **Dynamic Text** with the one you need. In this case : First Name and Last Name, Task #1, Task #2, and Age. When ready, click **Save Project** and go back to the **Field Definition** tab.
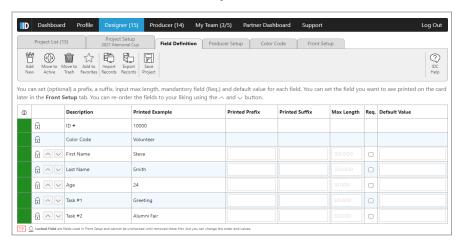
Now, as you can see, the field Organisation, Title, and Expiration Date are no longer locked.

> **Tip:** Did you know that IDC holds many keyboard shortcuts? So, instead of clicking the button **Save Project**, you can also hit CTRL-S to save your modifications!

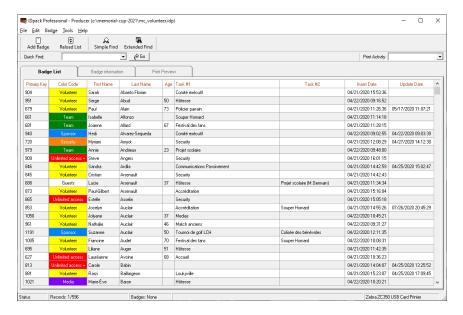Make sure to uncheck them and click **Save Project**.

Great, you now have the field you need. To import the records from IDp9 to IDC, the **Field Definition** must match perfectly, as well as the **Color Code Description,** if you are using it.
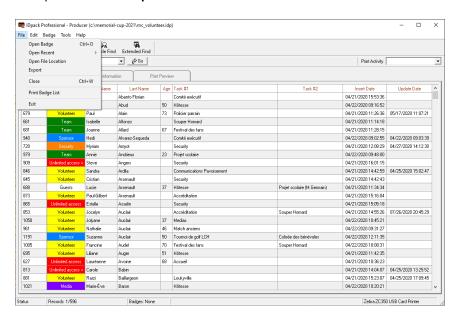
6- EXPORT YOUR RECORDS FROM IDPACK FOR WINDOWS

Now for the easier part, you can either export to Excel (.XLS) or Comma-Separated Values (.CSV). Its simpler to use Excel on your computer, although CSV works too.
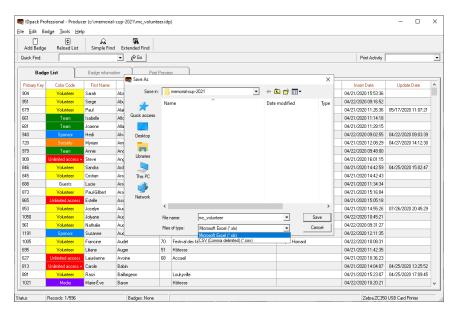
Open your badge layout in **IDpack Producer** (IDp9).
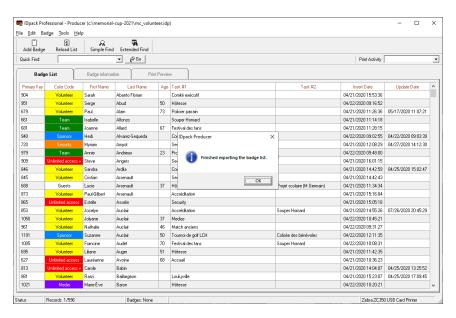

Click on the top menu: **File -> Export**.

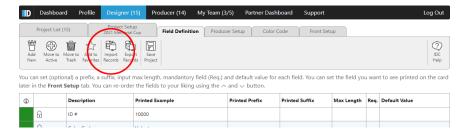This is where you can choose the file type: Excel or CSV.

When you are ready, click **Save** and make sure to remember where you saved the file. We recommend you save it on your desktop computer, so it's faster to find later.
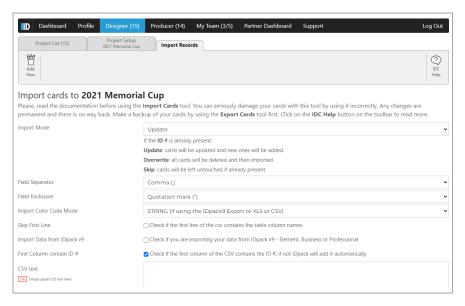

All your records are now exported to the file. Finally, it's time to import those records onto IDC!

7- IMPORT YOUR RECORDS INTO IDPACK IN THE CLOUD

Go back to IDC and click the **Import Records** icon in the toolbar.
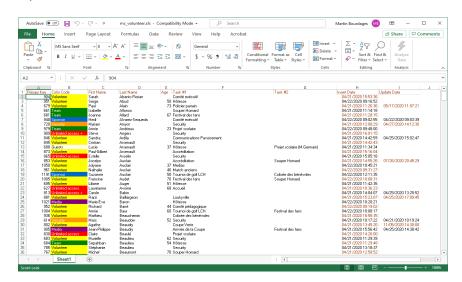

You should then see this:

You're doing great! Now, open the file you just saved with **IDpack Producer**, either with Excel or Notepad if it's a CSV file.
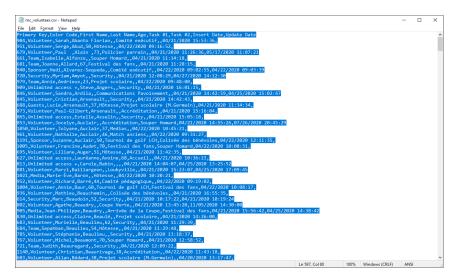
- If you have Excel:

Press CTRL-A to select everything, and CTRL-C to copy everything onto the **Clipboard**.

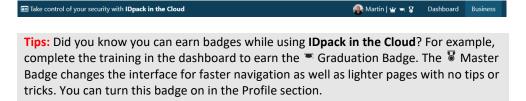- Inversely, if you created a CSV, open it with Notepad:

Press CTRL-A to select everything, and CTRL-C to copy everything onto the **Clipboard**.

IDC has more features than IDp9. Additionally, it's evolving at an incredible pace. Thank you for choosing IDC!

> **Tips:** Did you know you can earn badges while using **IDpack in the Cloud**? For example, complete the training in the dashboard to earn the 🎓 Graduation Badge. The 🏅 Master Badge changes the interface for faster navigation as well as lighter pages with no tips or tricks. You can turn this badge on in the Profile section.

Go back to the IDC **Import Records** screen.

Place your cursor on the **CSV text** box and hit CTRL-V to paste all your records. **DO NOT PRESS START IMPORTATION YET.** You need to understand IDC will not allow you to import more records than what your plan includes, as it will just skip all the records that are over your limit. For example, **IDpack in the Cloud** - **Business** has 2500 max records. When the limit is reached, IDC will skip the rest. Although if you need more records, you can upgrade your plan at any time.
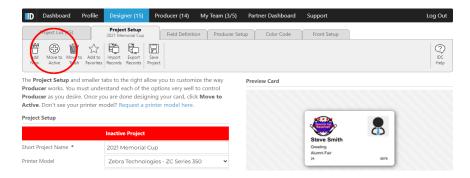
Ok, let setup the option above:

- **Import Mode**: choose Overwrite.
- **Field Separator:**
    o   If you are importing from CSV, select **Comma (,)**
    o   if you are importing from Excel, select **Tabulation**.
- **Field Enclosure:** Quotation mark (")
- **Import Color Code Mode:** select STRING for either Excel or CSV format.
- **Skip First Line:** this must be checked as the first line contains the table column names.
- **Import Data from IDpack v9 (IDp9, IDp8, IDP7):** this must be checked as this is what we are working on.
- **First Column contain ID #:** this must be checked .

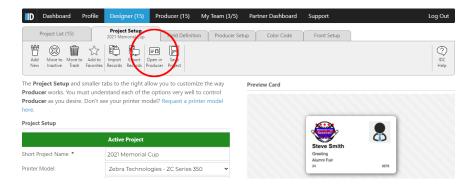You are now ready to click **Start Importation**.
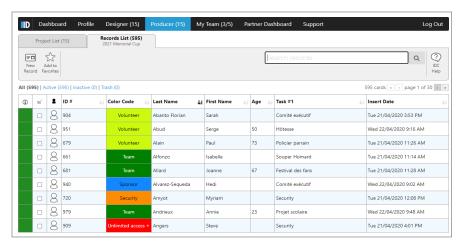

The importation is now completed.

Lastly, click on the tab **Project Setup**.

Click the button **Move to Active** at the top toolbar to activate your **Project** and to make it available in **Producer**.

Click the button **Open in Producer** to see the result.

All records are imported and the color codes match. Congratulation! We hope that our document has helped you migrate to **IDpack in the Cloud**.

If you have any questions or are struggling, please contact us.

https://www.idpack.cloud/