

HOW TO IMPORT RECORDS
FROM
IDPACK 9 FOR WINDOWS
INTO
IDPACK IN THE CLOUD

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NOMENCLATURE

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.

The **Project Setup** and smaller tabs to the right allow you to customize the way **Producer** works. Once you save this page, more options will be available. You design your card layout in **Designer**, and print them in **Producer**. Don't see your printer model? [Request a printer model here](#).

Please, enter a **Short Project Name**, choose a **Front Template** and save your project to continue.

Project Setup

Add New

Short Project Name *

Printer Model

Card format

Double Side

Front Template

Force Unicode Font

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.

The **Project Setup** and smaller tabs to the right allow you to customize the way **Producer** works. Once you save this page, more options will be available. You design your card layout in **Designer**, and print them in **Producer**. Don't see your printer model? [Request a printer model here](#).

Please, enter a **Short Project Name**, choose a **Front Template** and save your project to continue.

Project Setup

Add New

Short Project Name *

Printer Model

Card format

Double Side

Front Template

Force Unicode Font

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

The **Project Setup** and smaller tabs to the right allow you to customize the way **Producer** works. You must understand each of the options very well to control **Producer** as you desire. Once you are done designing your card, click **Move to Active**. Don't see your printer model? [Request a printer model here](#).

Project Setup

Inactive Project

Short Project Name *

Printer Model

Card format

Double Side

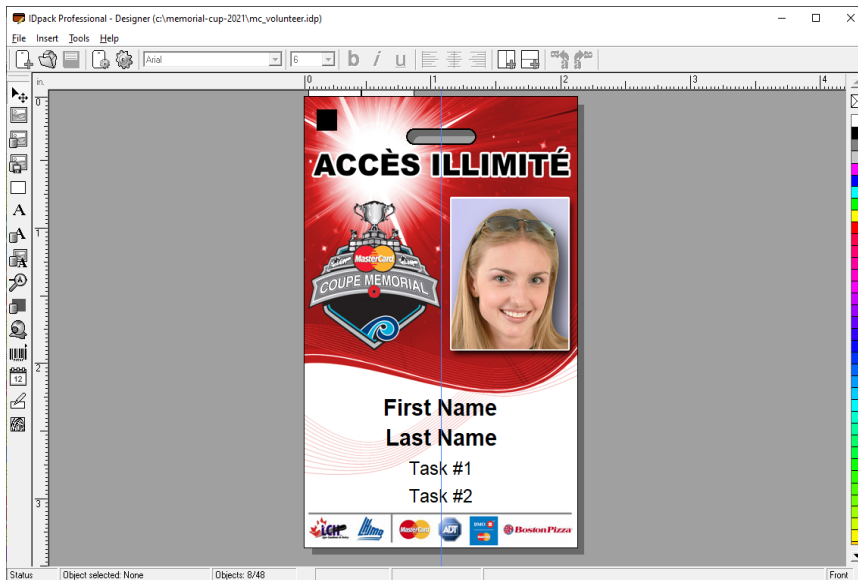
Front Template

Preview Card

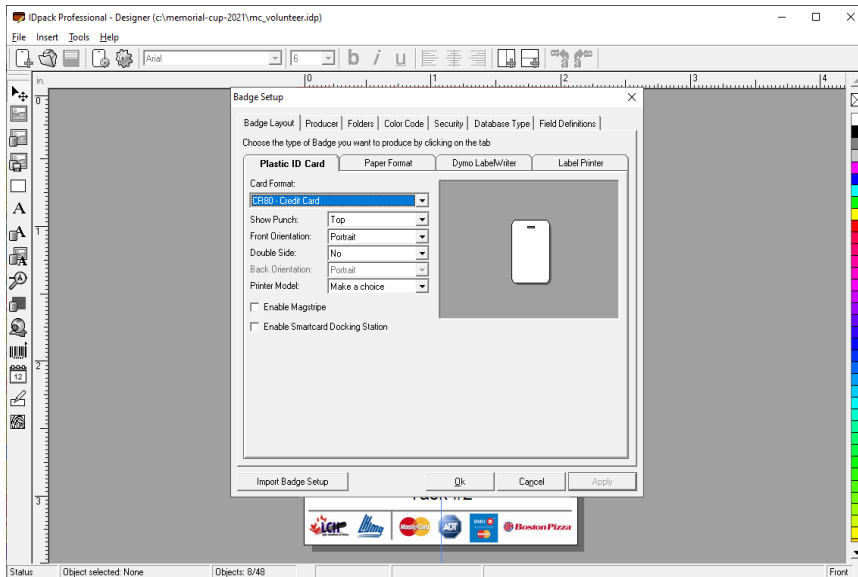
Steve Smith
ACME Example Inc.
Chief Executive Officer
1998-19-02 5678

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.

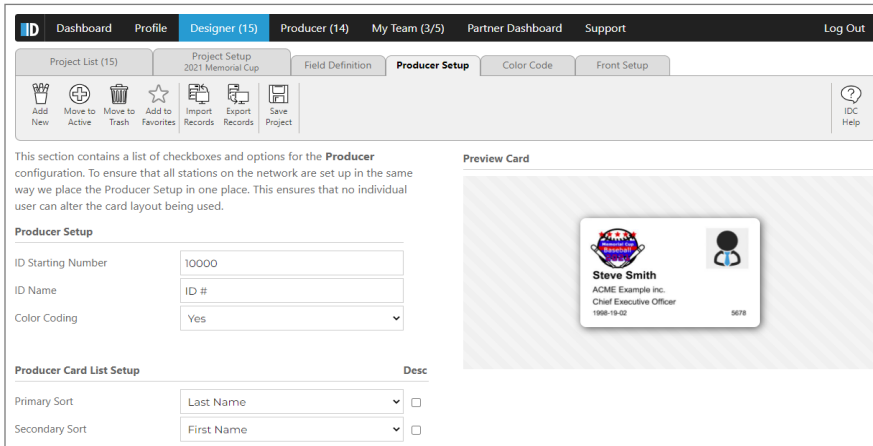


Click **Badge Setup**.

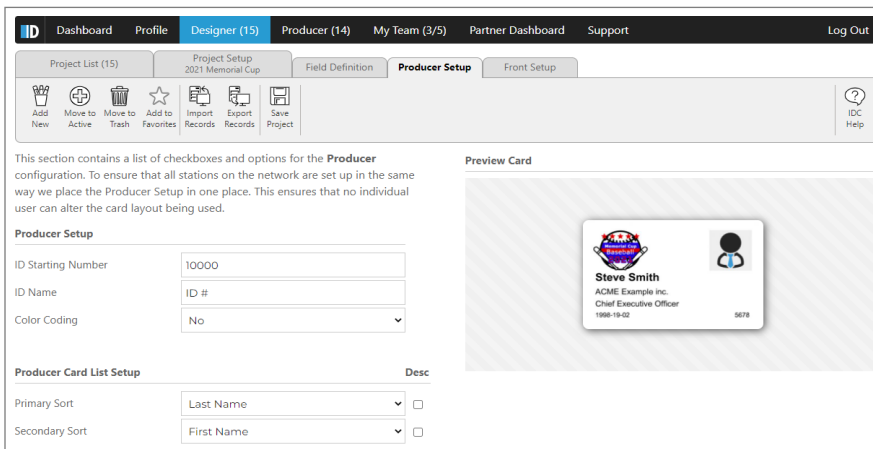


If you are using **Color Code**, jump to Step 3, otherwise you may continue.

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.

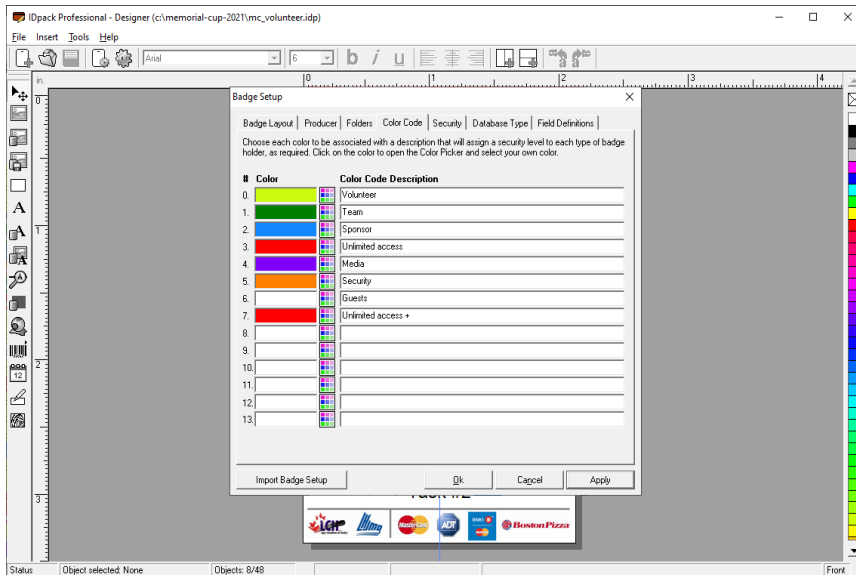


By disabling the color-coding system, you won't be able to import records with color code information. Feel free to switch it back on whenever you like.

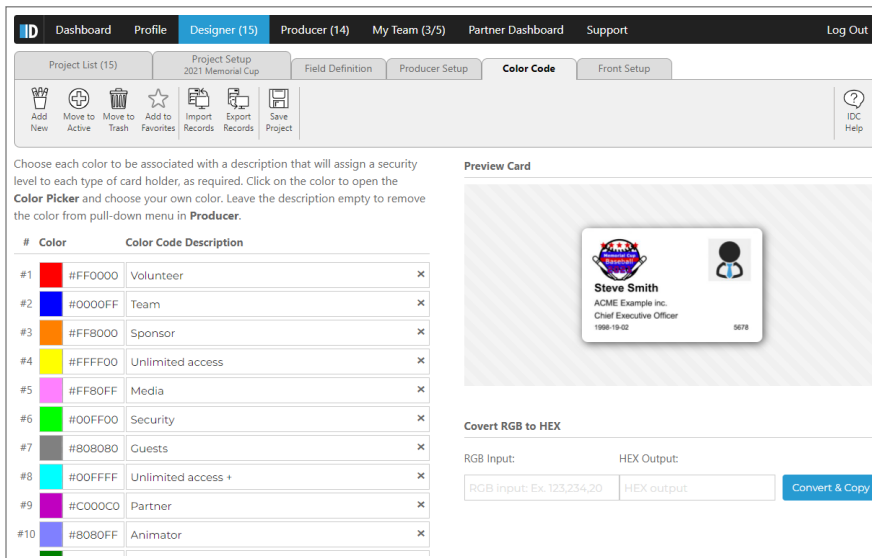
You can now directly jump to section 5.

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

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



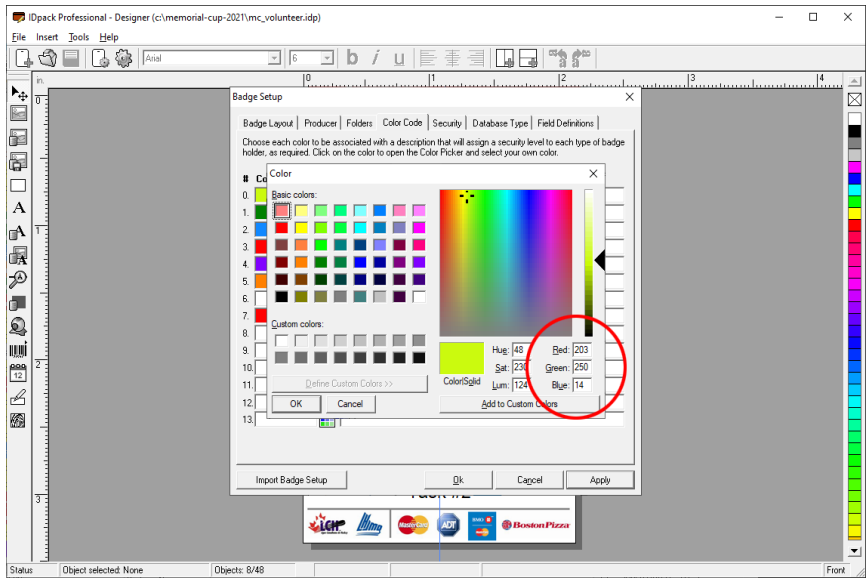
In IDC, from the **Designer**, click the **Color Code** tab and copy paste all the **Color Code Description** from IDp9 to IDC. Make sure to not alter or change the text that has been copied and pasted.



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.

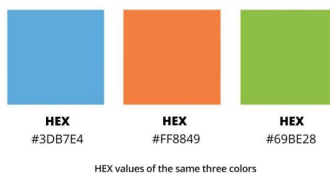


We highlighted the Red, Green and Blue (RGB) numbers to show you exactly what to copy. Don't forget to write down your RGB value, in this case: 203, 250, 14, and continue to write down all your numbers for each color (from 0 to 13).

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

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

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

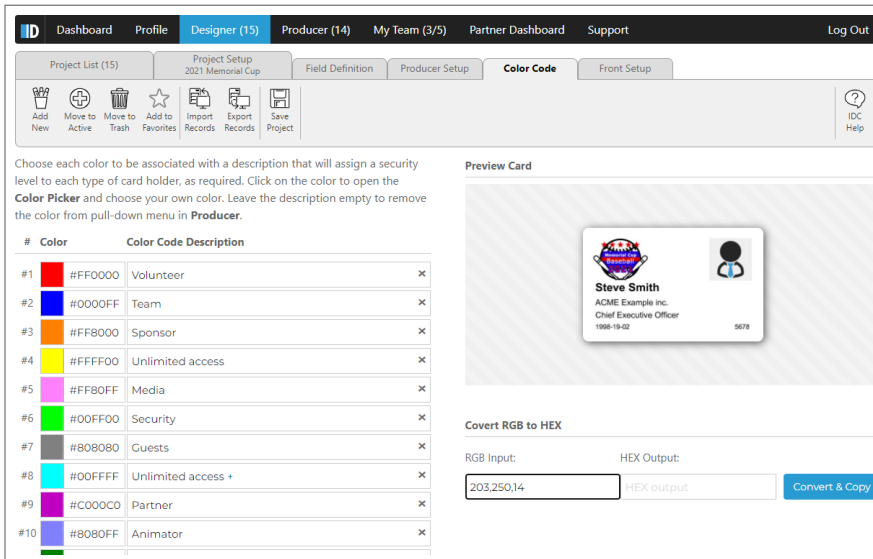


HEX values of the same three colors

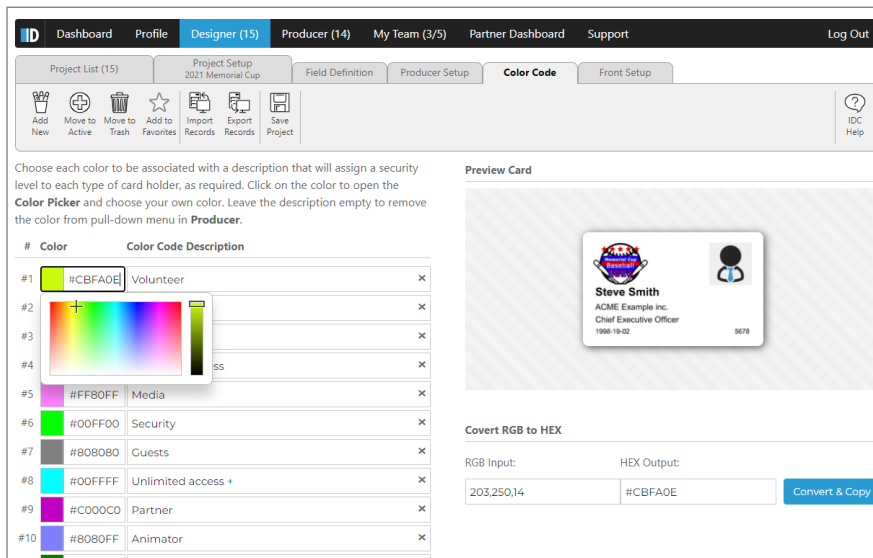
Tips: Designers and developers use HEX colors in web design, but what is HEX (hexadecimal color) color anyway? A HEX color is expressed as a six-digit combination of numbers and letters defined by its mix of red, green, and blue (RGB). Basically, a HEX color code is shorthand for its RGB values with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

Choose each color to be associated with a description that will assign a security level to each type of card holder, as required. Click on the color to open the **Color Picker** and choose your own color. Leave the description empty to remove the color from pull-down menu in **Producer**.

#	Color	Color Code	Description
#1		#CBFA0E	Volunteer
#2		#008000	Team
#3		#1188FF	Sponsor
#4		#FF0000	Unlimited access
#5		#8000FF	Media
#6		#FF8C00	Security
#7		#FFFFFF	Guests
#8		#FF0000	Unlimited access +
#9		#C000C0	Partner
#10		#8080FF	Animator

Preview Card

Covert RGB to HEX

RGB Input: 255,0,0 HEX Output: #FF0000 [Convert & Copy](#)

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

Choose each color to be associated with a description that will assign a security level to each type of card holder, as required. Click on the color to open the **Color Picker** and choose your own color. Leave the description empty to remove the color from pull-down menu in **Producer**.

#	Color	Color Code	Description
#1		#CBFA0E	Volunteer
#2		#008000	Team
#3		#1188FF	Sponsor
#4		#FF0000	Unlimited access
#5		#8000FF	Media
#6		#FF8C00	Security
#7		#FFFFFF	Guests
#8		#FF0000	Unlimited access +
#9			
#10			
#11			
#12			
#13			
#14			

Preview Card

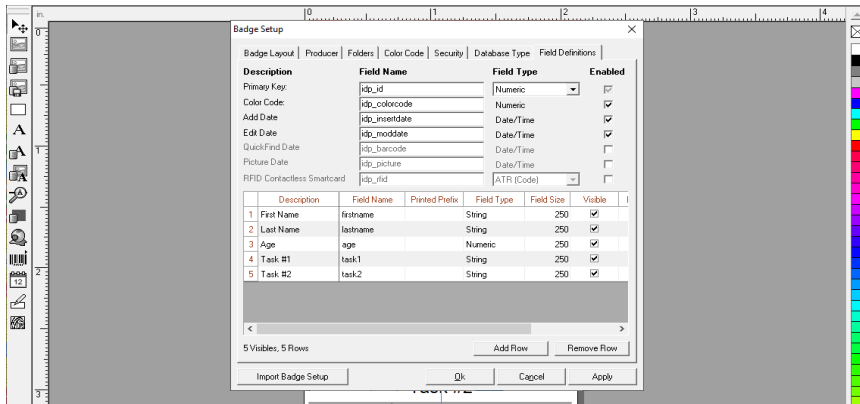
Covert RGB to HEX

RGB Input: 255,0,0 HEX Output: #FF0000 [Convert & Copy](#)

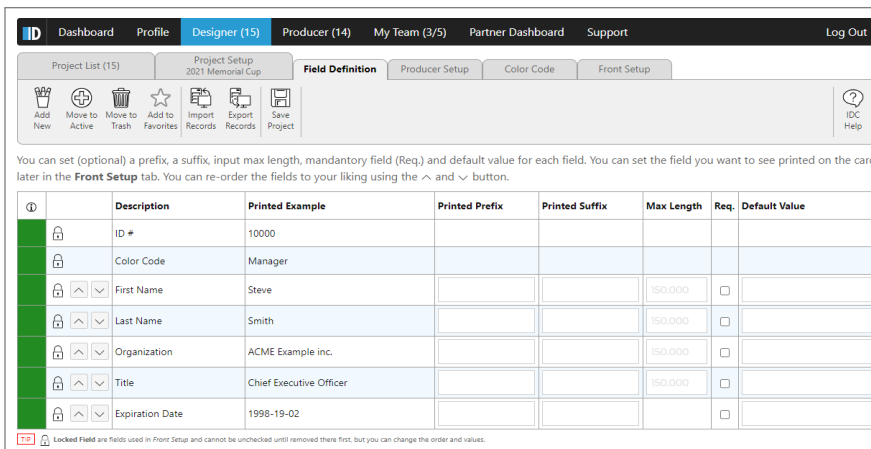
Good job! Now that the color codes are transferred, click **Save Project**. The next step is setting up the **Field Definition**. Buckle up!

5- SETTING UP THE FIELD DEFINITION

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

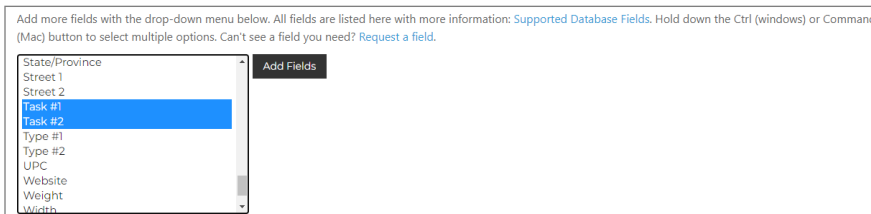


Do the same in IDC.



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.

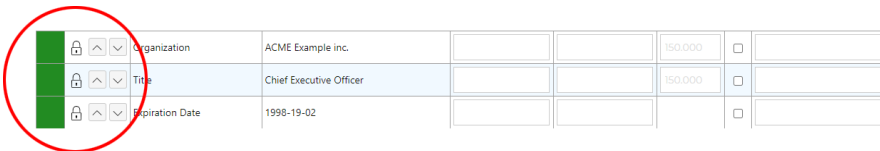


Tips: Hold down the CTRL (Windows) or Command (Mac) key to select multiple options.

Then, once you are ready, click the **Add Fields** button.

ID	Description	Printed Example	Printed Prefix	Printed Suffix	Max Length	Req.	Default Value
1	ID #	10000					
2	Color Code	Manager					
3	First Name	Steve			150,000	<input type="checkbox"/>	
4	Last Name	Smith			150,000	<input type="checkbox"/>	
5	Organization	ACME Example inc.			150,000	<input type="checkbox"/>	
6	Title	Chief Executive Officer			150,000	<input type="checkbox"/>	
7	Expiration Date	1998-19-02				<input type="checkbox"/>	
8	Age	24			10,000	<input type="checkbox"/>	
9	Task #1	Greeting			50,000	<input type="checkbox"/>	
10	Task #2	Alumni Fair			50,000	<input type="checkbox"/>	


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.

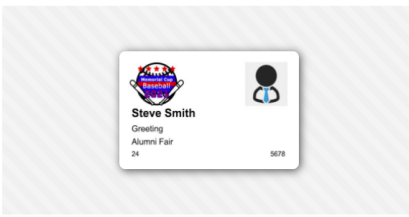


This is because they are in use on the front or the back of the card design. To change this, click the **Front Setup** tab and change the **Dynamic Text** with the one you need. In this case : First Name and Last Name, Task #1, Task #2, and Age. When ready, click **Save Project** and go back to the **Field Definition** tab.

The template you choose has 1 background image, 1 logo and 5 dynamic texts to be printed on the front of the card. Please assign fields for each one. Leave empty to have it blank on the card. Upload your image in PNG, JPEG or TIF format.

Background Image
1011 x 638 recommended | No Background | [Upload Background](#)

Logo
Logo #1 | 591 x 236 recommended |  | Current size: 961 x 745 | Logo is transparent | [Replace Logo](#) | [Remove](#)

Preview Card

Preview not in real-time, you need to Save Project to see changes.

Dynamic Text

Field #	Color Code	Assigned Field
Field #1	#000000	First and Last Name
Field #2	#000000	Task #1
Field #3	#000000	Task #2
Field #4	#000000	Age

Now, as you can see, the field Organisation, Title, and Expiration Date are no longer locked.

You can set (optional) a prefix, a suffix, input max length, mandatory field (Req.) and default value for each field. You can set the field you want to see printed on the card later in the **Front Setup** tab. You can re-order the fields to your liking using the ^ and v button.

ID	Description	Printed Example	Printed Prefix	Printed Suffix	Max Length	Req.	Default Value
1	ID #	10000					
2	Color Code	Volunteer					
3	First Name	Steve			150.000	<input type="checkbox"/>	
4	Last Name	Smith			150.000	<input type="checkbox"/>	
5	Organization	ACME Example inc.			150.000	<input type="checkbox"/>	
6	Title	Chief Executive Officer			150.000	<input type="checkbox"/>	
7	Expiration Date	1998-19-02				<input type="checkbox"/>	
8	Age	24			10.000	<input type="checkbox"/>	
9	Task #1	Greeting			50.000	<input type="checkbox"/>	
10	Task #2	Alumni Fair			50.000	<input type="checkbox"/>	

Locked Field are fields used in Front Setup and cannot be unchecked until removed there first, but you can change the order and values.

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**.

You can set (optional) a prefix, a suffix, input max length, mandatory field (Req.) and default value for each field. You can set the field you want to see printed on the card later in the **Front Setup** tab. You can re-order the fields to your liking using the ^ and v button.

ID	Description	Printed Example	Printed Prefix	Printed Suffix	Max Length	Req.	Default Value
1	ID #	10000					
2	Color Code	Volunteer					
3	First Name	Steve			150.000	<input type="checkbox"/>	
4	Last Name	Smith			150.000	<input type="checkbox"/>	
5	Age	24			10.000	<input type="checkbox"/>	
6	Task #1	Greeting			50.000	<input type="checkbox"/>	
7	Task #2	Alumni Fair			50.000	<input type="checkbox"/>	

Locked Field are fields used in Front Setup and cannot be unchecked until removed there first, but you can change the order and values.

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)**.

The screenshot shows the IDpack Professional - Producer interface. The main window displays a table of badge records with the following columns: Primary Key, Color Code, First Name, Last Name, Age, Task #1, Task #2, Insert Date, and Update Date. The records are sorted by Primary Key.

Primary Key	Color Code	First Name	Last Name	Age	Task #1	Task #2	Insert Date	Update Date
904	Volunteer	Sarah	Abanto Florian		Comité exécutif		04/21/2020 15:53:36	
951	Volunteer	Serge	Abud	50	Hôteesse		04/22/2020 09:16:52	
679	Volunteer	Paul	Alan	73	Polcier parain		04/21/2020 11:26:36	05/17/2020 11:07:21
661	Team	Isabelle	Alfonzo		Souper Homard		04/21/2020 11:14:18	
681	Team	Joanne	Allard	67	Festival des fans		04/21/2020 11:28:15	
940	Sponsor	Hedi	Alvarez-Sequeda		Comité exécutif		04/22/2020 09:02:55	04/22/2020 09:03:39
720	Security	Myriam	Amyot		Security		04/21/2020 12:08:29	04/27/2020 14:12:30
979	Team	Annie	Andrieux	23	Projet scolaire		04/22/2020 09:48:00	
909	Unlimited access	Steve	Angers		Security		04/21/2020 16:01:15	
846	Volunteer	Sandra	Audla		Communications Pavoisement		04/21/2020 14:42:59	04/25/2020 15:02:47
845	Volunteer	Cristian	Arsenault		Security		04/21/2020 14:42:43	
688	Guests	Lucie	Arsenault	37	Hôteesse	Projet scolaire (M.Germain)	04/21/2020 11:34:34	
673	Volunteer	Paul Gilbert	Arsenault		Accreditation		04/21/2020 15:16:04	
865	Unlimited access	Estelle	Asselin		Security		04/21/2020 15:05:18	
653	Volunteer	Jocelyn	Aucàir		Accreditation	Souper Homard	04/21/2020 14:55:26	07/26/2020 20:45:29
1050	Volunteer	Jolyane	Aucàir	37	Medias		04/22/2020 10:45:21	
961	Volunteer	Nathalie	Aucàir	46	Match anciens		04/22/2020 09:31:27	
1191	Sponsor	Suzanne	Aucàir	50	Tournoi de golf LCH	Collée des bénévoles	04/22/2020 12:11:35	
1005	Volunteer	Francine	Audet	70	Festival des fans	Souper Homard	04/22/2020 10:08:31	
695	Volunteer	Liliane	Auger	51	Hôteesse		04/21/2020 11:42:35	
627	Unlimited access	Lauréanne	Avoine	68	Accueil		04/21/2020 10:36:23	
813	Unlimited access	Carole	Babin				04/21/2020 14:04:07	04/25/2020 13:25:52
881	Volunteer	Razi	Baillegon		Loukyville		04/21/2020 15:23:07	04/25/2020 17:09:45
1021	Media	Maie-Eve	Baron		Hôteesse		04/22/2020 10:20:21	

Status: Records: 1/596 Badges: None Zebra ZC350 USB Card Printer

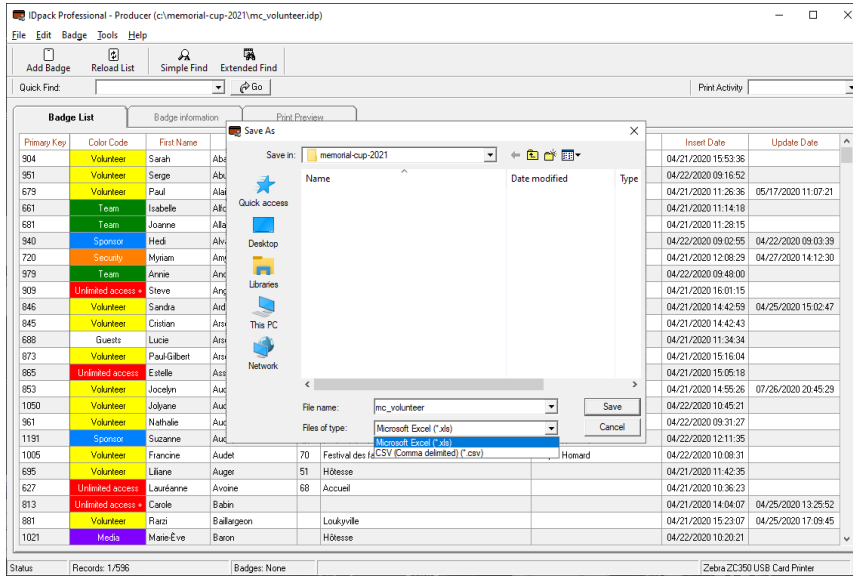
Click on the top menu: **File -> Export**.

The screenshot shows the IDpack Professional - Producer interface with the File menu open. The menu options are: Open Badge (Ctrl+O), Open Recent, Open File Location, Export, Close (Ctrl+W), Print Badge List, and Exit. The main window displays the same table of badge records as in the previous screenshot.

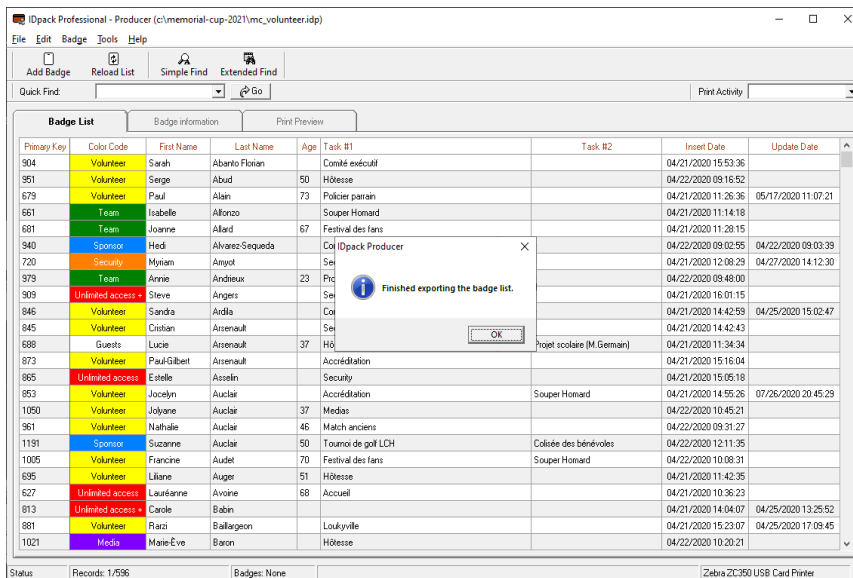
Primary Key	Color Code	First Name	Last Name	Age	Task #1	Task #2	Insert Date	Update Date
679	Volunteer	Paul	Alan	73	Polcier parain		04/21/2020 11:26:36	05/17/2020 11:07:21
661	Team	Isabelle	Alfonzo		Souper Homard		04/21/2020 11:14:18	
681	Team	Joanne	Allard	67	Festival des fans		04/21/2020 11:28:15	
940	Sponsor	Hedi	Alvarez-Sequeda		Comité exécutif		04/22/2020 09:02:55	04/22/2020 09:03:39
720	Security	Myriam	Amyot		Security		04/21/2020 12:08:29	04/27/2020 14:12:30
979	Team	Annie	Andrieux	23	Projet scolaire		04/22/2020 09:48:00	
909	Unlimited access	Steve	Angers		Security		04/21/2020 16:01:15	
846	Volunteer	Sandra	Audla		Communications Pavoisement		04/21/2020 14:42:59	04/25/2020 15:02:47
845	Volunteer	Cristian	Arsenault		Security		04/21/2020 14:42:43	
688	Guests	Lucie	Arsenault	37	Hôteesse	Projet scolaire (M.Germain)	04/21/2020 11:34:34	
673	Volunteer	Paul Gilbert	Arsenault		Accreditation		04/21/2020 15:16:04	
865	Unlimited access	Estelle	Asselin		Security		04/21/2020 15:05:18	
653	Volunteer	Jocelyn	Aucàir		Accreditation	Souper Homard	04/21/2020 14:55:26	07/26/2020 20:45:29
1050	Volunteer	Jolyane	Aucàir	37	Medias		04/22/2020 10:45:21	
961	Volunteer	Nathalie	Aucàir	46	Match anciens		04/22/2020 09:31:27	
1191	Sponsor	Suzanne	Aucàir	50	Tournoi de golf LCH	Collée des bénévoles	04/22/2020 12:11:35	
1005	Volunteer	Francine	Audet	70	Festival des fans	Souper Homard	04/22/2020 10:08:31	
695	Volunteer	Liliane	Auger	51	Hôteesse		04/21/2020 11:42:35	
627	Unlimited access	Lauréanne	Avoine	68	Accueil		04/21/2020 10:36:23	
813	Unlimited access	Carole	Babin				04/21/2020 14:04:07	04/25/2020 13:25:52
881	Volunteer	Razi	Baillegon		Loukyville		04/21/2020 15:23:07	04/25/2020 17:09:45
1021	Media	Maie-Eve	Baron		Hôteesse		04/22/2020 10:20:21	

Status: Records: 1/596 Badges: None Zebra ZC350 USB Card Printer

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



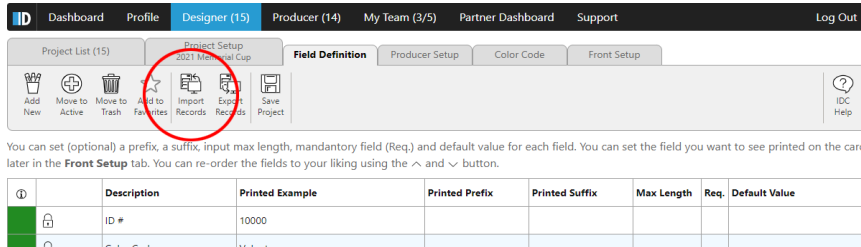
When you are ready, click **Save** and make sure to remember where you saved the file. We recommend you save it on your desktop computer, so it's faster to find later.



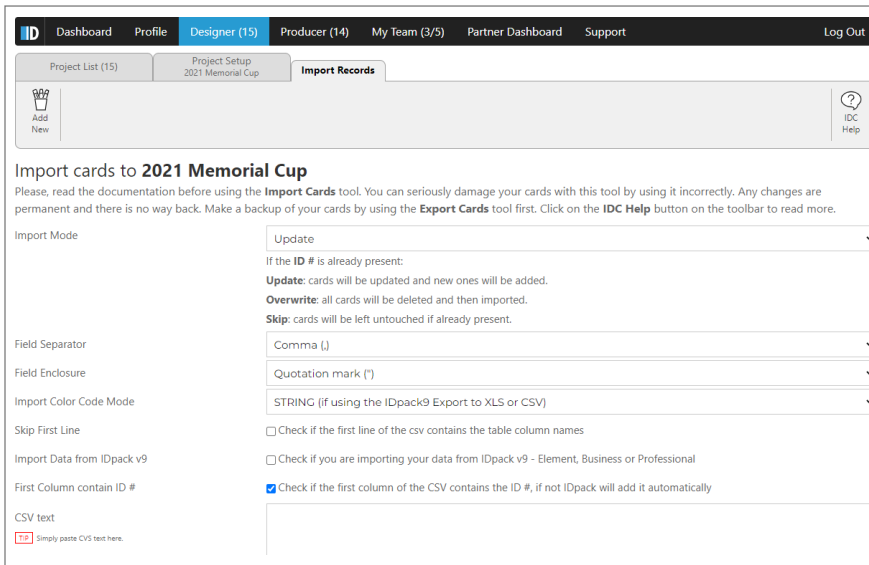
All your records are now exported to the file. Finally, it's time to import those records onto IDC!

7- IMPORT YOUR RECORDS INTO IDPACK IN THE CLOUD

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

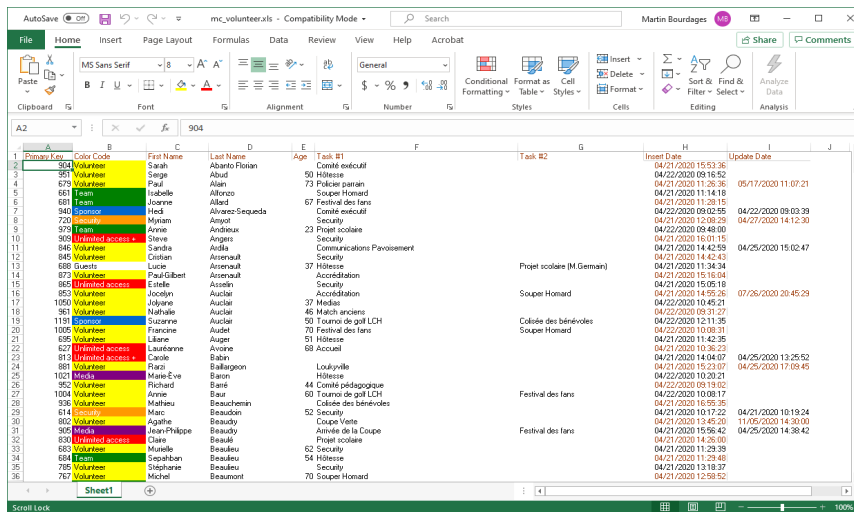


You should then see this:



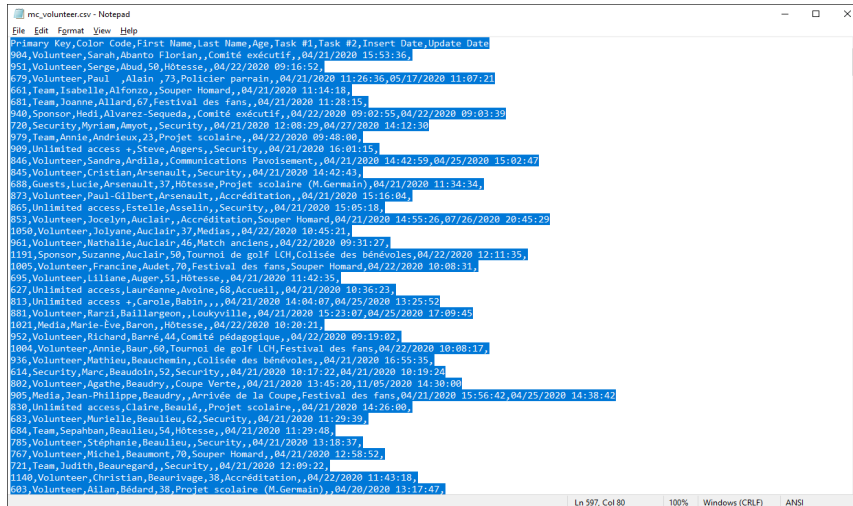
You're doing great! Now, open the file you just saved with **IDpack Producer**, either with Excel or Notepad if it's a CSV file.

- If you have Excel:



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

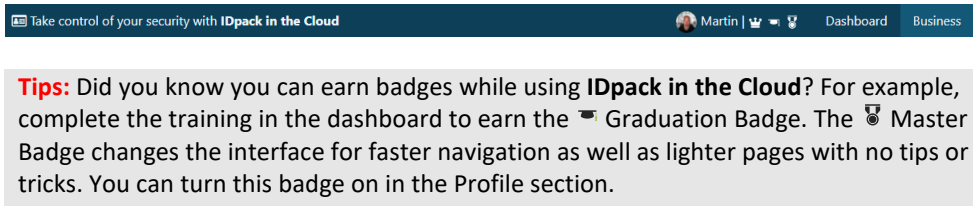
- Inversely, if you created a CSV, open it with Notepad:





```
mc_volunteer.csv - Notepad
File Edit Format View Help
Primary Key,Color Code,First Name,Last Name,Age,Task #1,Task #2,Insert Date,Update Date
904,Volunteer,Sarah,Abanto Florian,,Comité exécutif,,04/21/2020 15:53:36,
951,Volunteer,Sergio,Abud,50,Hôtesse,,04/22/2020 09:15:52,
679,Volunteer,Paul,,Alain,,73,Policier parrain,,04/21/2020 11:26:36,05/17/2020 11:07:21
661,Team,Isabelle,Alfonzo,,Souper Howard,,04/21/2020 11:14:16,
881,Team,Joanne,Allard,67,festival des fans,,04/21/2020 11:28:15,
240,Sponsor,Medi,Alvarez-Segueda,,Comité exécutif,,04/22/2020 09:02:55,04/22/2020 09:03:39
720,Security,Myriam,Amyot,,Security,,04/21/2020 12:08:29,04/27/2020 14:12:30
979,Team,Annie,Andrieux,23,Projet scolaire,,04/22/2020 09:48:00,
909,Unlimited access,,Steve,Angers,,Security,,04/21/2020 16:01:15,
845,Volunteer,Sandro,Arctijj,,Communications Favoisement,,04/21/2020 14:42:59,04/25/2020 15:02:47
845,Volunteer,Cristian,Arsenault,,Security,,04/21/2020 14:42:43,
688,Guests,Lucie,Arsenault,37,Hôtesse,Projet scolaire (M.Germain),04/21/2020 11:34:34,
973,Volunteer,Paul-Gilbert,Arsenault,,Accréditation,,04/21/2020 15:16:04,
905,Unlimited access,Estelle,Asselin,,Security,,04/21/2020 15:05:10,
853,Volunteer,Jocelyn,Auclair,,Accréditation,Souper Howard,04/21/2020 14:55:26,07/26/2020 20:45:20
1050,Volunteer,Jolyane,Auclair,37,Medias,,04/22/2020 10:45:21,
951,Volunteer,Mathilde,Auclair,46,Match anciens,,04/22/2020 09:31:27,
1191,Sponsor,Suzanne,Auclair,50,Tournoi de golf LCH,Colisée des bénévoles,04/22/2020 12:11:35,
1005,Volunteer,Francine,Audet,70,Festival des fans,Souper Howard,04/22/2020 10:08:11,
995,Volunteer,Lilliane,Auger,51,Hôtesse,,04/21/2020 11:42:35,
927,Unlimited access,Laurence,Avoine,68,Accueil,,04/21/2020 10:36:23,
813,Unlimited access,,Carole,Babin,,,,04/21/2020 14:04:07,04/25/2020 13:25:52
881,Volunteer,Razzi,Baillargeon,,Loukyville,,04/21/2020 15:23:07,04/25/2020 17:09:45
1021,Media,Marie-Eve,Baron,,Hôtesse,,04/22/2020 10:20:21,
952,Volunteer,Richard,Barré,44,Comité pédagogique,,04/22/2020 09:19:02,
1004,Volunteer,Annie,Baur,60,Tournoi de golf LCH,Festival des fans,04/22/2020 10:08:17,
936,Volunteer,Mathieu,Beauchemin,,Colisée des bénévoles,,04/21/2020 16:55:35,
624,Security,Marc,Beaudoin,52,Security,,04/21/2020 18:17:22,04/21/2020 10:19:24
902,Volunteer,Agathe,Beaudry,,Coupe Verts,,04/21/2020 13:45:20,11/05/2020 14:30:00
905,Media,Jean-Philippe,Beaudry,,Arrivée de la Coupe,Festival des fans,04/21/2020 15:56:42,04/25/2020 14:38:40
830,Unlimited access,Claire,Beaulé,,Projet scolaire,,04/21/2020 14:26:00,
683,Volunteer,Marie-Eve,Beaulieu,62,Security,,04/21/2020 11:29:39,
684,Team,Sepahban,Beaulieu,54,Hôtesse,,04/21/2020 11:29:48,
785,Volunteer,Stéphanie,Beaulieu,,Security,,04/21/2020 13:18:37,
767,Volunteer,Michel,Beaumont,70,Souper Howard,,04/21/2020 12:58:52,
721,Team,Jeddy,Beauregard,,Security,,04/21/2020 12:09:22,
1149,Volunteer,Christian,Beauprivage,38,Accréditation,,04/22/2020 11:43:18,
603,Volunteer,Allan,Bédard,38,Projet scolaire (M.Germain),04/20/2020 13:17:47,
```

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!



Take control of your security with **IDpack in the Cloud** Martin | Dashboard Business

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.

Import Mode: Overwrite

If the ID # is already present:
Update: cards will be updated and new ones will be added.
Overwrite: all cards will be deleted and then imported.
Skip: cards will be left untouched if already present.

Field Separator: Tabulation

Field Enclosure: Quotation mark (")

Import Color Code Mode: STRING (if using the IDpack9 Export to XLS or CSV)

Skip First Line: Check if the first line of the csv contains the table column names

Import Data from IDpack v9: Check if you are importing your data from IDpack v9 - Element, Business or Professional

First Column contain ID #: Check if the first column of the CSV contains the ID #, if not IDpack will add it automatically

CSV text

Primary Key	Color Code	First Name	Last Name	Age	Task #1	Task #2	Insert date	Update Date
984	Volunteer	Sarah	Abanto Florian		Comité	excultif	4/21/2020	15:53
951	Volunteer	Serge	Abud	58			4/22/2020	9:16
679	Volunteer	Paul	Alain	73			4/21/2020	11:26
661	Team	Isabelle	Alfonso				4/21/2020	11:14
681	Team	Joanne	Allard	67			4/21/2020	11:28
948	Sponsor	Hedi	Alvarez-Sequeda				4/22/2020	9:02
728	Security	Myriam	Amout				4/21/2020	12:08
979	Team	Annie	Andrieux	23			4/22/2020	9:48
989	Unlimited access	Stere	Angers				4/21/2020	18:01
894	Volunteer	Sandra	Arélla				4/21/2020	14:42

Start Importation

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:**
 - If you are importing from CSV, select **Comma (,)**
 - 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**.

Dashboard Profile **Designer (15)** Producer (14) My Team (3/5) Partner Dashboard Support Log Out

Project List (15) Project Setup 2021 Memorial Cup **Import Records**

Add New ? IDC Help

Import cards to **2021 Memorial Cup**

Results

[ALL CARDS DELETED]

[ADDED ROW #1] Sarah Abanto Florian (984)

[ADDED ROW #2] Serge Abud (951)

[ADDED ROW #3] Paul Alain (679)

[ADDED ROW #4] Isabelle Alfonso (661)

[ADDED ROW #5] Joanne Allard (681)

[ADDED ROW #6] Hedi Alvarez-Sequeda (948)

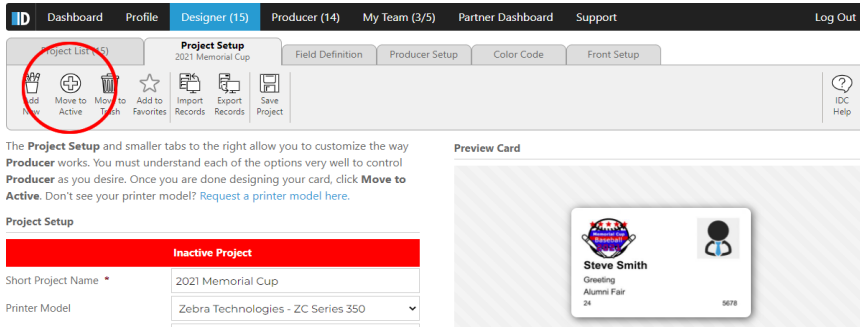
[ADDED ROW #7] Myriam Amout (728)

[ADDED ROW #8] Annie Andrieux (979)

Please, read the documentation before using the **Import Cards** tool. You can seriously damage your cards with this tool by using it incorrectly. Any changes are permanent and there is no way back. Make a backup of your cards by using the **Export Cards** tool first. Click on the **IDC Help** button on the toolbar to read more.

The importation is now completed.

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



The **Project Setup** and smaller tabs to the right allow you to customize the way **Producer** works. You must understand each of the options very well to control **Producer** as you desire. Once you are done designing your card, click **Move to Active**. Don't see your printer model? [Request a printer model here](#).

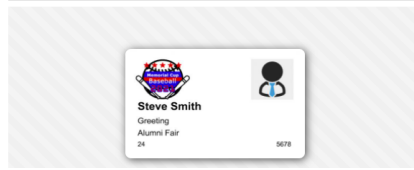
Project Setup

Inactive Project

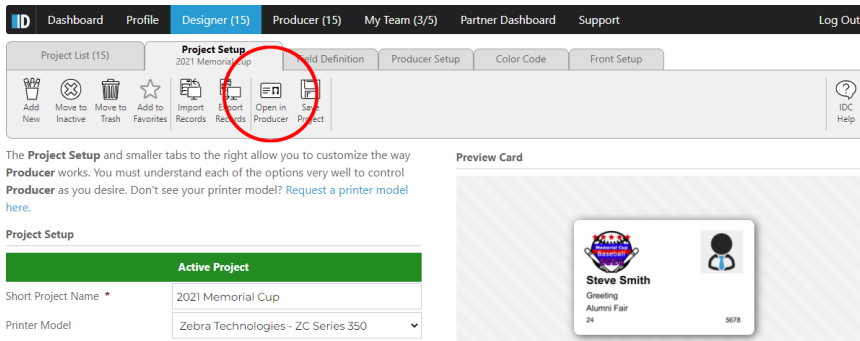
Short Project Name * 2021 Memorial Cup

Printer Model Zebra Technologies - ZC Series 350

Preview Card



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



The **Project Setup** and smaller tabs to the right allow you to customize the way **Producer** works. You must understand each of the options very well to control **Producer** as you desire. Don't see your printer model? [Request a printer model here](#).

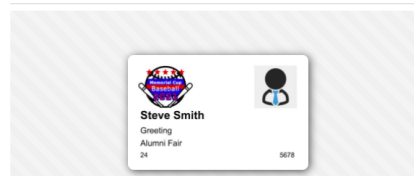
Project Setup

Active Project

Short Project Name * 2021 Memorial Cup

Printer Model Zebra Technologies - ZC Series 350

Preview Card



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

ID #	Color Code	Last Name	First Name	Age	Task #1	Insert Date
904	Volunteer	Abanto Florian	Sarah		Comité exécutif	Tue 21/04/2020 3:53 PM
951	Volunteer	Abud	Serge	50	Hôtesse	Wed 22/04/2020 9:16 AM
679	Volunteer	Alain	Paul	73	Policier parrain	Tue 21/04/2020 11:26 AM
661	Team	Alfonzo	Isabelle		Souper Homard	Tue 21/04/2020 11:14 AM
681	Team	Allard	Joanne	67	Festival des fans	Tue 21/04/2020 11:28 AM
940	Sponsor	Alvarez-Sequeda	Hedi		Comité exécutif	Wed 22/04/2020 9:02 AM
720	Security	Amyot	Myriam		Security	Tue 21/04/2020 12:08 PM
979	Team	Andrieux	Annie	23	Projet scolaire	Wed 22/04/2020 9:48 AM
909	Unlimited access +	Angers	Steve		Security	Tue 21/04/2020 4:01 PM



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/>