

Credentials made easy

USER GUIDE

IDProducer Template Designer

This User Guide is a simple and quick Reference Guide for those using the IDProducer Template Designer in the design and of their ID Cards.

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1. Introduction

The IDProducer Template Editor is used by businesses, as part of a Web-based Badging System, to design various types of ID cards. This User Guide contains important information on how to proceed and explains the program features. In reading this User Guide, you will also find how-to tips, useful notes and alerts to guide you in the overall designing process.

2. In a nutshell

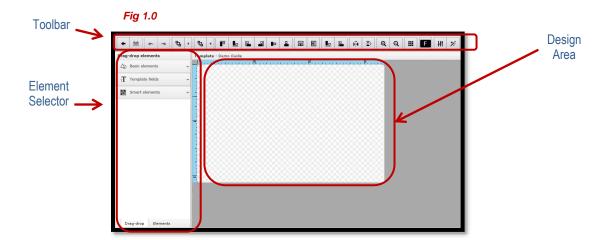
- √ The IDProducer Template Editor, is developed, using pre-defined ISO compliance template settings (CR80, etc.):
- √ Basic Elements, Template Fields or Custom Elements are also used in the design of ID cards;
- √ Upon completion, the design is saved by the user into the Web-based Badging System for use by the designated officials or departments.



The IDProducer Template Editor is strictly used for designing ID cards. The overall management and printing process is handled elsewhere within the Web-based Badging System.

3. Getting Started

Various tools from the **Toolbar** or **Element Selector** are available to the user when designing ID cards, as you can see below (*Fig. 1.0*).



- Toolbar: allows you to work with your layout, moving and aligning objects, saving your design, etc.
- Element Selector: allows you to add specific pre-designed elements to your ID card design (text, barcode, images, etc.), by drag-dropping them in the Design Area.
- Design Area: This is where you will add your elements and see the overall look of your ID card design, at design stage or final stage.
- Element Properties Panel: A panel that will appear once you drag-drop elements to the Design Area (Section 6).

4. Toolbar

The **Toolbar** serves as the main menu for the work area when designing your ID card. The user calls an action by simply clicking on the respective icon (*Fig. 2.0*).

Fig 2.0

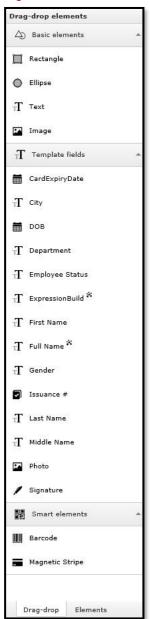


Let's have a look at each of these, in the order they appear:

- **Back Arrow (1):** Go back to the previous menu. Works the same way as any back arrow that you find in browsers like Internet Explorer or Microsoft Edge, for example.
- Save document (2): Save your work. The icon becomes disabled when your work has been saved. Otherwise, a red star (*) appears beside the template name in the status line above the Design Area, allowing you to click on the "Save document" icon.
- Undo/Redo Arrows (3): Used to undo something or when you wish to navigate through the history of actions performed.
- **Positioning (4):** Move an object to the front or the back of another.
- Alignment (5): Align two or more objects or elements based on their top, bottom, left, right, or middle horizontal or vertical relative positions.
- Width/Height (6): Make objects or elements equal in width or in height.
- Distribution (7): Set identical distance (horizontally or vertically) between objects or elements.
 Distribution is set based on the size of the object's or element's box, even when it has no visible borders.
- Mirror (8): Flip an object or element horizontally or vertically.
- **Zoom (9):** Increase or decrease the size of the **Design Area** when working on your ID card design.
- **Grid (10):** Set the grid on or off when designing your ID card. This applies only when there is no background color set.
- Change Card Side (11): Switch from the front (F) or to back (B) and vice versa of your ID card design.
- **Template Settings (12):** Select a template from the pre-defined designs (ISO compliance) and determine if your ID card has only one side or two.
- Template Expressions (13): An Expression Builder where you can add custom expressions that will appear as standing elements in your Element Selector. We will examine this in details in Section 7.

5. Element Selector

Fig 3.0



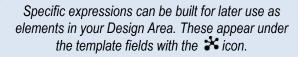
The **Element Selector** (*Fig. 3.0*) is divided into three categories, (Drag-drop tab): Basic Elements, Template Fields and Custom Elements. Each of these uses a drag and drop functionality that makes it easy for designing.

Basic Elements: allows you to add **static elements** such as rectangles, ellipses, text or images. The recurring use of unchangeable information or images on ID cards is particularly important if, as an example, you wish to add the company's logo on all ID cards. *Click on the drop-down arrow; make your selection and drag-drop into the Design Area of your ID card*.

Template Fields: allows you to add **dynamic elements** such as a date of birth, the name of the ID card owner, the gender, a photograph, etc. These fields are pre-defined and for each element added, the information is generated from a database, at the time of printing the ID card. *Click on the drop-down arrow; make your selection and drag-drop into the Design Area of your ID card*.

Smart elements: allows you to add a dynamic barcode or magnetic stripe. It works the same way as in the template fields above, where the information is generated from a database. *Click on the drop-down arrow; choose a barcode or magnetic stripe and drag-drop into the Design Area of your ID card.* See **Section 5.3** for more details.

Elements tab: When you click on this tab, you are redirected to the list of template elements currently in use in your design (**Section 5.2**).





When drag-dropping an element to the Design Area, a Properties Panel (see **Section 6.0**) appears on the right side of the Design Area, with similar options for all elements. This is where you set the size, color, borders, position, etc. for the selected element.

5.1 A user-friendly environment

Fig 4.0



Resizing elements: You can resize an element directly in the Design Area, by clicking on the dots around it, or by setting values in the Properties Panel (Section 6). You can also move one or more elements by selecting them directing in the Design Area. Use the lasso tool (an automatic selection that is set when you move your cursor around specific elements) or hold the Ctrl-Key and click on each element that you wish to select, prior to applying a specific action to all of them at once (moving, resizing, deleting, copying, adding a border, etc.).

Resizing a text box: There are two ways to resize text boxes when designing your ID card template. If you use the **Ctrl while resizing the box**, this will leave the text centered within the box. This is particularly useful if your font is large and you are unsure if the text will fit within that box without shrinking. When you resize a box **without using the Ctrl**, the text will move as you scale the box.

Copying: You can also copy an element in your **Design Area** by using the Control and Paste function (Ctrl-C + Ctrl-V). When you do so, the element copied will be placed at the same location vertically, but just under the element that you used for the copy function.



Font size: scales to fit text box when printing the ID card. Using a large font in a small text box may shrink the text to fit properly. Increase the element box from the **Design Area** to prevent this from happening.



When multiple objects or elements are selected in your Design Area, any action performed applies to all of them.



You wish to design an ID card with identical elements on both sides (for example, a background color)? Use the copy and paste function and, from the toolbar menu, move to the other side of your ID card to paste it.

5.2 List of template elements

Each element in your **Design Area** works similarly as a layer element, with the exception that you cannot group them. To view the elements you are currently using in your ID card template, simply click on the "**Elements**" tab located at the bottom of the **Element Selector**. This leads you to the list of **Template elements** (*Fig. 5.0*).

Table 1.0

Defined abbreviations and icons					
Rect: Rectangle	■ Ellipse: Ellipse	Pic: Static image			
FLD: Information generated field (text, image, photo)	TXT: Text or label field	 EXP: An expression applied to an element 			
■ ●: The element will not print on the ID Card	The element is locked and cannot be edited	 K: Printing is forced to panel-K 			

Fig 5.0



Element's order: Elements appear in the order they are added to your ID card template.

You can change their order, by using the positioning option from the Toolbar. Clicking on the image of that icon, allows you to move your element to the back or to the front, while the arrows allows you to move an element one step forward or one step backward to the desired location in the list of template elements. Whatever option you choose to apply, you will see your element moving on the list of template elements, from their original location.



An element sent to the back appears at the top of the list, while an element sent to the front appears at the bottom of the list.

Element's name: For each element added, a default name is given in the following format: "[untitled] – elementtype#". If you are adding a rectangle to your **Design Area**, that element will be named "[untitled] – rect1". The number in the element's name is generated automatically and adds up for each similar element dropped into the **Design Area**. You can rename any element by adding a "tag" to it, from the **Properties Panel** (Section 6). Once you rename an element, that name appears inside the brackets.

5.3 Smart elements

Barcode and magnetic stripes are commonly used in access control by security staff. Using the Smart elements is one easy way to do it.

A) Adding a Barcode

Fig 6.0

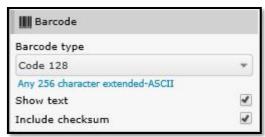


When you add a barcode to the **Design Area**, it uses the default format (Barcode type, Code128) as shown on *Fig.* 6.0. You can change that format in the Properties Panel, under the Barcode tab, by using the drop-down list of predefined formats. See also *Section 8.1* to view the full list of available formats.

Note that when you choose a format, you automatically see its description in blue under the Barcode type (*Fig. 7.0*). Some barcodes use text and graphic. In this case, you may decide to ignore the text on your ID card by simply clicking on the "**Show text**" box to enable or disable that option. The **Checksum** option can also be enabled or disabled by the user.

As in any other elements, you may resize your Barcode and define its properties from the **Properties Panel**.

Fig 7.0



B) Adding a Magnetic Stripe

Fig 8.0



When you add a magnetic stripe to the **Design Area**, the options are slightly different and limited. You will notice that the **Properties Panel** is much shorter (*Fig. 8.0*) and that you cannot set any condition to a magnetic stripe.

Because magnetic stripes use mostly text fields, you are able to use expressions you may have built in the **Expressions Builder**.

- ➤ First, give your magnetic stripe a tag (optional) and determine where you want the stripe to appear on the ID card (top or bottom) and select that option from the drop-down list.
- ➤ Magnetic stripes can have a maximum of three lines of text. Determine yours by choosing the right value in the number of tracks. The number of tracks that you choose will also be reflected in the "Track content" section.
- ► Next, determine which fields or built-in expressions you would like to use on the ID card. You will notice that an expression will display the expression logo in the filename. You can also access the **Expression Builder** by clicking on the icon beside the filename. But when you get there, you will only be able to navigate in the Expressions tab.

6. Properties Panel

Fig 9.0



Most of the options within the **Properties Panel** (*Fig. 9.0*) are similar for the elements that you drag-drop into the Design Area, with a few exceptions.

Item tag: This optional tag item serves to identify your element layer. Once you, it appears in the "Template elements" within the square brackets.

Item condition: All element properties (text and font, border, color and opacity, size and position, etc.) are set to "Default condition". The "0 of 0" means that you have not defined specific conditions for your template elements. Once you do, that number changes to "1 of 1" or "1 of 2", etc. In this case, the icon appears to allow you to access the Expression Builder. Defined conditions can be applied to any drag-dropped element in your Design Area, with different properties.

Text and Font: This option applies to Text or Date elements, where you can determine text alignment within the text box, set font, color and text size, set multiple line spacing and determine if text would wrap or not. The "**Field/Expression**" indicates whether the element is a single field or if there is an expression attached to it (the icon appears beside the element type for all expressions, along with the icon to allow you to edit your expressions).



Font size: scales to fit text box. Using a large font in a small text box may shrink the text to fit properly. Increase the element box from the Design Area to prevent this from happening.

Border: Borders can be added to any element. By default, none is applied (no border style). Even though a color and border width is set, it becomes visible only when a style is applied.

Color and opacity: Use this option to set a background color to your element or a gradient from two colors, if applied.



Background color set to a Text or Date element, applies to the box surrounding the element, even without a border style.

Size and position: Use this option to move an element within the **Design Area** (Left, Top), or to increase or decrease its size (Width, Height).



Increase or decrease the size of a selected element by moving your cursor over one of the dots around it until you see a two-way arrow. Use the Shift-key while resizing your element to keep its ratio aspect.

Other properties: The "Panel-K" option is used to force all printing in black. By default, text, numeric fields, and dynamic barcodes are printed in black. The "Lock selection" is particularly useful if you wish to avoid selecting it by mistake when working or moving other elements within the Design Area. Note, however, that locking the selection doesn't prevent you from editing the element properties. By default, the lock is disabled. The "Don't print" option is simply to mark an element that you would not want to print on your ID card.

7. Expression Builder

As mentioned earlier, you can build various text expressions or set a number of conditions that you may apply to almost any element used on your ID card. The **Expression Builder** is very practical and uses an easy way to help you achieve your goal.

You may access the Expression Builder directly from the Toolbar, using the from the Properties Panel once you have selected an element from the Design Area.

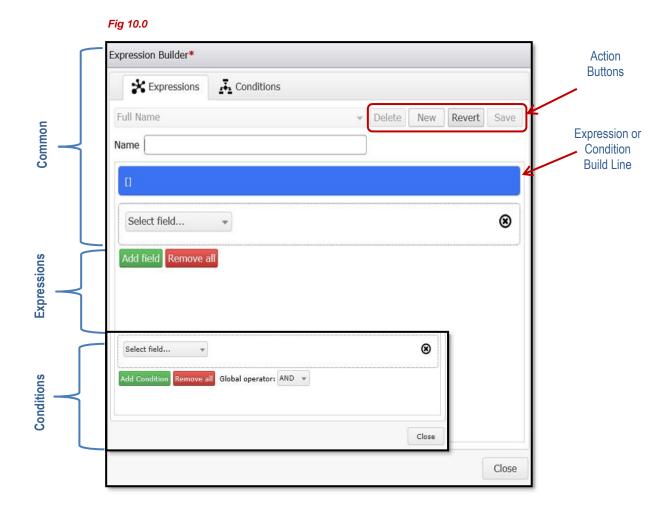


With the exception of the magnetic stripe, the $\overset{\star}{\sim}$ icon remains visible under the item condition of the Properties Panel. Under the Text and Font, it appears only if a selected element has an expression built to it. In this case, the $\overset{\star}{\sim}$ is displayed beside the element name.

7.1 The start-up screen

When you start the Expression Builder, you will get a screen (*Fig. 10.0*), where you can either build expressions (*) or conditions (*). A red star * appears in the status bar to indicate that you have not yet saved your work. As you can see, this screen is similar in both, the Expressions or Conditions environment.

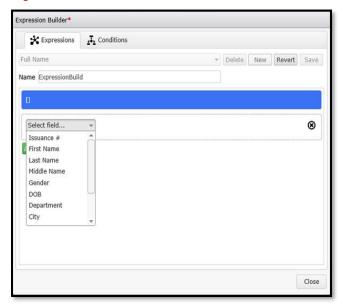
While the Expressions deal mainly with text (specific string formats), the Conditions deal with the graphic aspects or attributes (border, background color, shapes, etc.) added to an ID card in order to draw attention when going through control access.



7.2 How does it work?

Whether you are building expressions or conditions, you will be starting the same way. Therefore, we will refer to *Fig. 11.0* for the initial steps that you will be performing.

Fig 11.0



- ► Click on the "New" button to create expressions or conditions;
- Name your expression or condition. That name then appears right under the Expressions or the Conditions tab. In our case, we named it "ExpressionBuild";
- ► Choose a field from the drop-down list of available fields by clicking on the **Select field...** dropdown;
- ► Repeat step 2 until you are done with your expression or condition;
- ► Click on the Save button and close the Expression Builder. At that point, you will be

able to see it in the **Properties Panel**. Note that your expression will also appear in the list of **Template elements**, where you will be able to drag-drop it for later use.



You wish to save some time in building similar expressions? Use an existing one, write a new name in the Name field and click on save! See the steps below!

- ▶ Use an existing expression or condition and give it a new name. At that point, you will see the red star on top of the Expression Builder, indicating that you have made changes and your work is not yet saved.
- ► Click Save
- ► A confirmation screen appears (*Fig. 12.0*) where you need to decide if you wish to simply overwrite the existing expression or condition
- ► Click **NO** if you wish to change the existing one (overwrite) or click **YES** to make a clone
- ► Click **CANCEL** if you simply wish to go back to your previous steps (last save)

Fig 12.0



A) Expression Basics

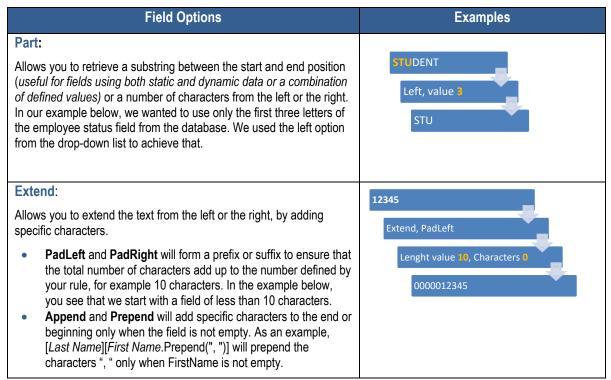
Throughout the process of adding fields to your expressions, you have to choose from various options to achieve what you want. The table below shows you these options for each field type.

Table 2.0

_		FIELD TYPES					
	Available Options	BUILT	TEXT	NUMERIC	DATE		
	Left						
PART	Right	✓					
	Substring						
	Append						
EXTEND	Prepend	√					
LATENO	PadLeft	•					
	PadRight						
	UpperCase	√					
CASE	LowerCase						
	ProperCase						
FORMAT	Time or Date Format			✓	✓		
OTHER	Text Box: User add desired text in text		✓				
UTPIER	box. This text appears on the ID card.		•				

Examples of how these options can be used

Table 3.0



B) Condition Basics

In working with conditions, you start the same way as for building expressions. See *Fig. 11.0*. However, due to the endless possibilities that you can use in building conditions, we have broken down two main options for the fields that you can select from the pre-defined list, as shown in the table below.

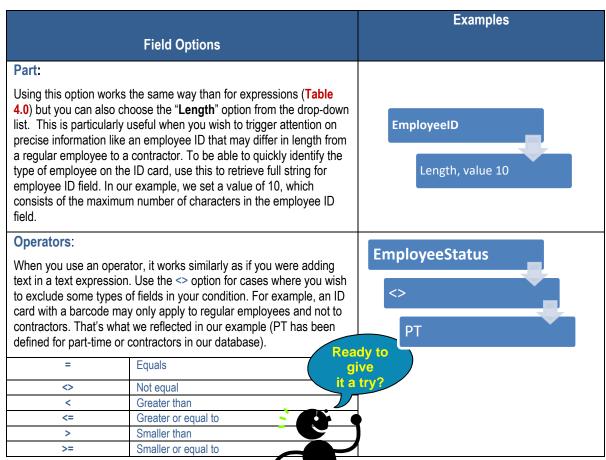
Table 4.0Working with Conditions

_		FIL	ELD TYPES	
	Available Options	BUILT	NUMERIC	DATE
	Left			
PART	Lenght	./		
FARI	Right	v		
	Substring			
	=			
	<>			
	<			
Operators	<=	✓	✓	\checkmark
	>			
	>=			



The text you type when using a conditional operator is not case sensitive.

Table 5.0



7.3 Build and apply conditions and expressions

Business ABC Scenario

This business runs offices in foreign countries and has three types of workers: full-time employees (FT), contractors or part-time employees (CT or PT), as well as remote employees (FT-R) working in foreign offices. Each of these workers is provided with specific access rights, controlled by security staff as they get into the building. The ID cards vary based on the employee status. **Business ABC** has designed a standard template, with different rules for each of type of worker.

Let's start by using the contractor ID card. On this card, there are two sets of rules: an expression built with the employee status (combination of the employee status and the card expiry date), as well as a condition (yellow rectangle) applied to our expression.

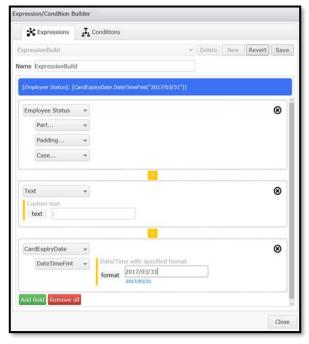
Front

Business ABC

Department
Communications
Toronto

Bah, Regis S
CT. 2017/03/31

Fig 14.0



To build our expression, we used three fields from the list of available pre-defined fields: the Employee Status field, a Text field, and the CardExpiryDate field with the 31st of March 2017 as the reference date. When you build your expression, it appears automatically on the Expression Build Line shown in blue, under the Expression Name. Let's explore this:

- ► We used the "Add field" button each time a field was required in our expression. We also used the Text field with a colon to separate the first and last field. Although this may not have been necessary, it makes our expression easier to read.
- ➤ The Expression Build Line shows the end result... basically what will be generated prior to being part of the ID card.

NOTE: We left the date format to our system default. Refer to **Section 8.2** for the various possibilities.

Two (2) ways of using an expression on an ID card template

One is simply choosing a single element without a built-in expression and the other one is choosing the built-in expression as an element that you drag-drop into the Design Area. The field that we used for our expression is the **Employee Status field**.

A) Drag-drop a single element - in our case the "Employee Status" field

Fig 15.0



- ► Choose an element from the **Template fields** of the **Element Selector** and drag it to the Design Area.
- ► Make sure you have the element selected and go to the Properties Panel.
- ▶ Under the **Text and font**, click on the drop-down list of the **Text content** and select the expression that you have built. Remember that all expressions have a specific icon (♣) attached to them.
- ➤ Your expression is now applied to your element and set to your ID card template.
- B) Drag-drop an expression in our case the "ExpressionBuild (the name we had first gave our expression)"
 - ➤ Choose the expression from the **Template fields** of the **Element Selector** and drag it to the Design Area.
 - ➤ You will notice that from the **Properties Panel**, the expression is automatically selected in the **Text Content** drop-down list under the **Text and font**.
 - ➤ You may choose to stop there as the expression is already applied on your ID card template. But, depending on the name you have given it, it might be wise to edit the text that appears on your template so that you can easily identify your



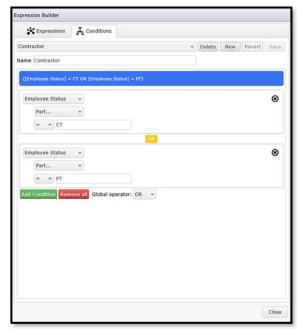
expression, especially if you are using more than one expression on your template.

- ▶ While you have the expression selected, go to the **Properties Panel**.
- ▶ Under the **Text and font**, go to the **Edit Text** box and add text to identify your expression. In our case, we used the same as the single element, meaning "**Employee Status**". But because it's an expression, it's easy to distinguish it from a single element as it has the specific icon (※) attached to it. You can also achieve that within the Expression Builder, simply by renaming your expression (see **Section 7.2**).
- Your expression is now set on your ID card template.

Let's now build our conditions and apply them on our ID card template

The steps below use the same ID card that we used when building our expression (*Fig. 13.0*).

Fig 17.0



- ► First, we added a new condition by clicking on the "New" button.
- ► We named our condition "Contractor" so that we can use it for either part-time or contractual employees.
- ► We added our first condition field by clicking on the "Add Condition" option from the bottom and by choosing the "Employee Status".
- As we wanted to select only those employees that met our criteria, we first used the "Part..." field option from the drop-down list, along with the "=" condition operator and added the employee status with a "CT" in the text box. Therefore, for all employees in the database where the employee status equals to CT, the condition would be applied. In this case, CT meant contractual employees.
- Next, we chose the Global operator (OR) to add another part to our condition... the employees with a part-time status. Note that we could have chosen the

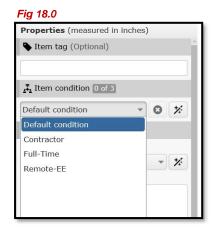
"AND" as well since these two types of employee status would always have the same condition in our case.

- ▶ We then added "PT" in the text box to clearly identify the status of part-time employees.
- We saved our condition and closed the Expression Builder.

You will recall that in our **Business ABC Scenario** (**Section 7.3**), we have three types of workers: full-time employees (FT), contractors or part-time employees (CT or PT), as well as remote employees (FT-R) working in foreign offices. Therefore, we built three conditions, one for each type.

Once you build your conditions, you can apply them to your elements, using the **Properties Panel**. In *Fig 18.0* you can see the **Default condition** and the other three conditions that we have built.

► In your **Design Area**, select the element to which you want a condition applied. In our case, we chose the "**Employee Status**".





You will notice that when you select an element from the Design Area, the Default condition is set under the Item condition.

Applying a color attribute to our condition

► While our element was still selected, we chose the "Contractor" condition from the Item condition of the Properties Panel.

Fig 19.0



- As shown in Fig 19.0, we chose a yellow background color that will print on the ID card for all employees with a CT or PT employee status.
 - ➤ You can see that a check mark appears beside the name of your condition, under the **Item condition** to indicate that you have attributes applied to it.



Only the attributes for the Default condition will show up in your Design Area, when applied to an element. However, you will still see it in the Panel Properties.

You will also notice that the "Don't print" box option under the "Other properties" is defaulted to a black fill. This simply means that, your condition uses the same condition than what was set for the elements using the parent condition (Default condition). In this case, the element "Employee Status" was set to print on all ID

cards. If we did not want it to print, we would have simply clicked on that box to show the "Don't print" option selected.

► For each of our **Employee Status**, we proceeded the same way: we chose the condition from the drop-down list and applied a color attribute, if required. In our case, only two types of employees would show a background color for the Employee Status (*Fig 20.0*). The **part-time/contractors** (yellow background) and the **remote** employees (green background). We left the full-time employees to **Default condition**.

Fig 20.0







7.4 Dos and Don'ts

	Dos		Don'ts
-	Add a few fields at once and define them	-	Leave a field added without an expression
	afterwards to accelerate the process.		associated to it you will not be able to save.
•	Use [⊗] to remove fields.	•	Use the Revert button to delete a single field, unless you wish to go back to the last saved work.
•	Select the right expression from the drop-down list prior to making any changes.	•	Use the Delete button to delete a single field it will delete the whole expression.

8. Formats and Descriptions

8.1 idProducer Barcodes

Table 7.0

	DDAY SAMPE	ONO CO	Ter ^k		Surf. Barcode Sample
Coaabar	A0123456789B	Digits 0-9 Symbols -\$:/.+	Y	Y	Barcode Sample
Code 128	Count01234567	Any 256 character extended-ASCII	Υ		
Code 16K	Abcd-1234567890-wxyZ	Any 256 character extended-ASCII			
Code 39	CODE 39	Numbers 0-9 Capital letters A-Z Symbols\$/+%* and space	У	у	
Code 39 Extended	Code39 Ext!	Any 128 ASCII data	Υ	Υ	
Code 49	MULTIPLE ROWS CODE 49	Any 128 ASCII data			
code93 : Code 93	CODE 93	Numbers 0-9 Capital letters A-Z Symbols\$/+%* and space	Υ	Υ	
Code 93 Extended	Code93 Ext!	Any 128 ASCII data	Υ	Υ	Code 93 Ext!
EAN-13	2112345678900	Twelve or thirteen digits, optionally followed by a space then two or five digits	Y		2 112345 678900 >
EAN-8	2345673	Seven or eight digits, optionally followed by a space then two or five	У		< 0234 5673 >
GS1-128	(01)95012345678903(3103)000123	Any 256 character extended-ASCII	У		(01)95012345678903(3103)000123
nterleaved 2 of 5 (ITF)	2401234567	Numbers 0-9	У	У	024012345676
MSI Modified Plessey	123456789	Numbers 0-9	У	у	0 1 2 3 4 5 6 7 8 9 7
PDF417	This is PDF417	Any 256 character extended-ASCII			
USPS POSTNET	1234	Digits from the ZIP code without dashes	У		
QR Code	This is a QR Code	Any 256 character extended-ASCII			
UPC-A	416000336108	Eleven or twelve digits, optionally followed by a space then two or five digits	У		4
UPC-E	123457	Seven or eight digits, optionally followed by a space then two or five digits	У		₀₩Ŋ₩₩Ŋ

8.2 idProducer Date/Time

Table 8.0

Date/Time	Token	Output				
Month	M	1 2 11 12				
	MM	01 02 11 12				
	MMM	Jan Feb Nov Dec				
	MMMM	January February November				
		December				
	Мо	1st 2nd 11th 12th				
Quarter	Q	1 2 3 4				
Day of Month	D	1 2 30 31				
	DD	01 02 30 31				
	Do	1st 2nd 30th 31st				
Day of Year	DDD	1 2 364 365				
	DDDD	001 002 364 365				
	DDDo	1st 2nd 364th 365th				
Day of Week	d	0 1 5 6				
	do	0th 1st 5th 6th				
	dd	Su Mo Fr Sa				
	ddd	Sun Mon Fri Sat				
	dddd	Sunday Monday Friday Saturday				
Week of Year	W	1 2 52 53				
	WW	01 02 52 53				
	Wo	1st 2nd 52nd 53rd				
Year	YY	70 71 29 30				
	YYYY	1970 1971 2029 2030				
AM/PM	А	AM PM				
	a	am pm				
Hour	Н	0 1 22 23				
	HH	00 01 22 23				
	h	1 2 11 12				
Minute	hh	01 02 11 12				
Minute	m	0 1 58 59				
Cocond	mm	00 01 58 59				
Second	S	0 1 58 59				
	SS	00 01 58 59				

Examples:

```
MM/DD/YYYY → 02/14/2016
DD-MMM-YYYY → 14-Feb-2016
MMMM YYYY → February 2016
dddd, MMMM Do YYYY → Sunday, February 14th 2010
dddd, MMMM Do YYYY, h:mm:ss a → Sunday, February 14th 2016, 3:25:50 pm
```

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