Using the InnoVisioNate Sign Out Processor

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What is the Sign Out Processor?

With Visio Logger – you can have visitors Sign In and Out

Visio Logger can operate in an "Auto Logger" mode, which is simple to setup and configure. However, when in this mode – Visio Logger is less able to utilize some of the more advanced features of the system, such as traversing different "paths" through the collection process based on the value of a previously collected field or fields.[1]

Therefore, the Sign Out Processor is provided to allow you to enable your system to allow signing out *within* the normal Logger mode of operation.

What is meant by "Sign Out"

When Visio Logger finishes collecting a row of data for your visitor, the row is considered complete for that visitor. However, if you want that same person, perhaps when leaving the facility, or when finished with the resource they "checked out", to indicate this activity on the *same record* as their sign in, the system needs to have a way to *find* that sign in record, and mark it as signed out.

Essentially, the Sign Out Processor is a tool that you can configure to enable the Visio Logger system to know:

- When a visitor is requesting the Sign In, or the Sign Out activity
- How to *find* the record the visitor signed in with, to mark it as signed out

Setting the Sign Out Processor Properties

When Visio Logger is running under a user with Administrative privileges on the computer (right click and choose "Run as Administrator", if there is doubt about these privileges), the main menu will contain an entry for Tools → Toolbox.

The Toolbox is a collection of Visio Logger integration software objects that enhance the power of Visio Logger by performing certain actions on the collected data at pre-defined points within the sign in (or out) process.

In the current case, you should see, in the "After the record is complete…" group of tools, one called, "InnoVisioNate Sign Out Processor", the button in the Props column of that table will provide the configuration window shown in Figure 1.

Important: Do not forget to select the checkbox that appears to the left of this object. If you do not, you can still configure the processor, but it will not actually get used. Note that you can temporarily turn the option off completely by un-checking this option.

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[1] This particular feature is implemented in the InnoVisioNate Page Submitted Processor. Please reference "Using the InnoVisioNate Page Submitted Processor" document located in the InnoVisioNate folder in the ProgramData folder. Or, investigate the properties of that tool, and click Help.
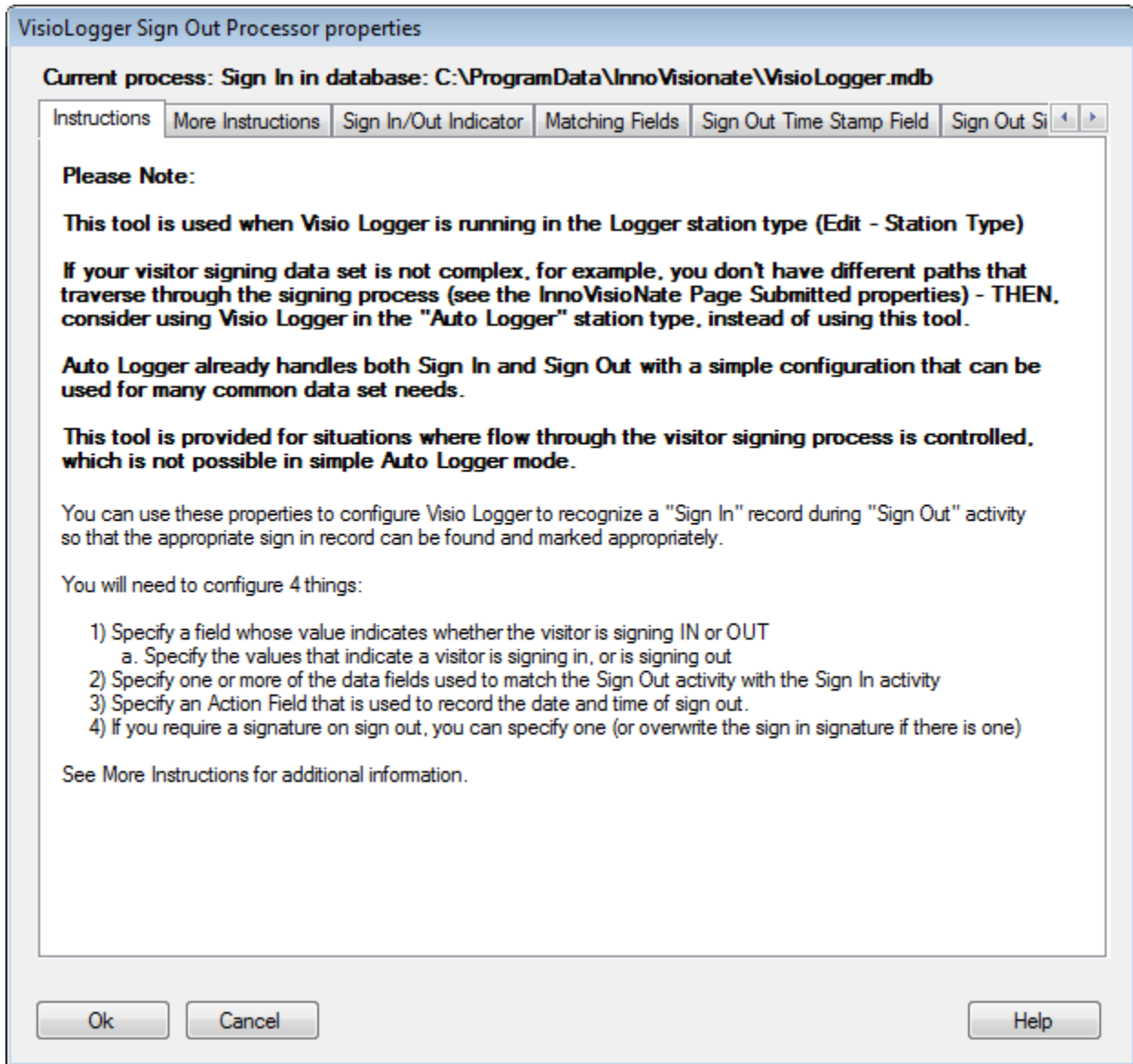
Figure 1 Sign Out Processor Properties main page

Using the above property settings, you can provide all of the information the processor needs to successfully turn the normal data collection activity into *both* initial data collection (sign in), *and* the ability to automatically find a previously entered record and mark it as "signed out".

The remainder of this document describes each of the tabs shown in Figure 1.

Configuring the Sign In/Out Indicator

This property names the *field* in your set of data that will be used to indicate whether the signer has requested Sign In, or Sign Out.

If you currently do not implement Sign Out, and would like to add the capability, then you need to define the field that you will later use in these properties.

For example, within Visio Logger[2], choose Edit → Columns. Then, create a new "Page" for data collection by clicking the "New" tab at the far right of the set of pages. You should see "Page 1", "Page 2", and so on for each page currently defined, and to the right of that, find "New" and click that tab. This tab will then be renamed "Page n", where n is the new number of total pages, in Figure 2, this is showing a new Page 5.
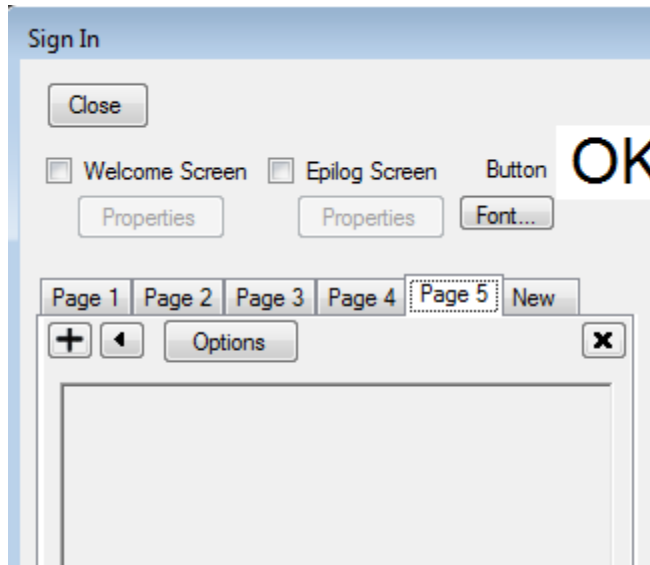

Figure 2 Partial view of adding a new Page

Click the "+" button on the left side of the Page definition tab to create a new field, you will see the dialog shown in Figure 3. Note in the figure, we have circled the important attributes for this type of field, which is a menu field (Multi-Valued).

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[2] Recall that most of these activities require Visio Logger to be running As Administrator
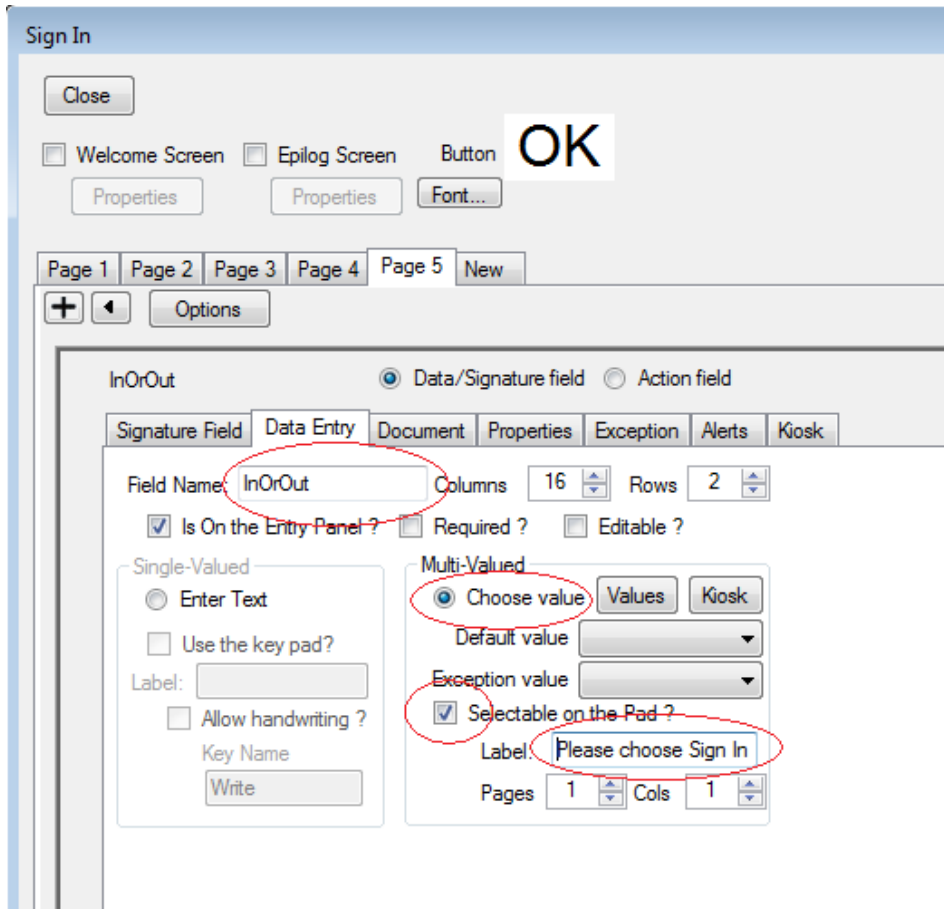
Figure 3 Partial view of Defining a new Data Entry Field

Now, specify the name for your field, we have used the name InOrOut.

After ensuring the values indicated are provided, click the "Values" button to specify our two "activity" choices.

Upon doing this, we see where menu items get their values. Note that we have provided two values. The values can be anything desired or which has context within your particular environment. However, there must be exactly 2 such values. Note also the Label option – this can be whatever text you want to appear on the signature pad along the top, and does not have to be provided.
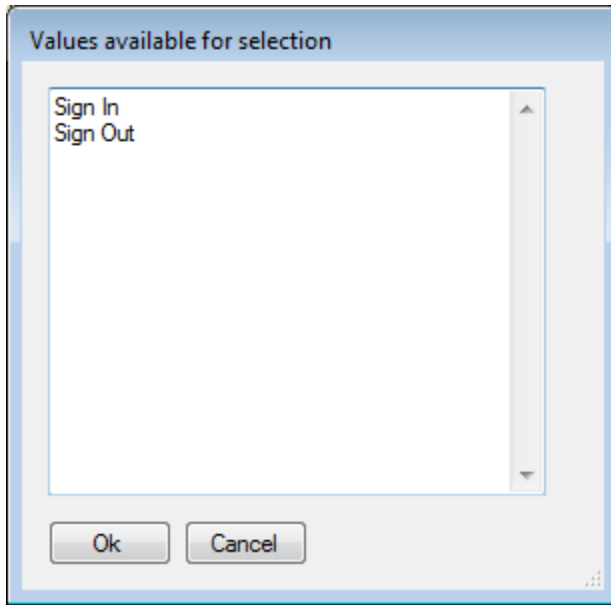
Figure 4 Specifying values for a menu field

> **Important:** Remember, we want the InOrOut question to get asked, if not first, very near the front of the collection process for each signer. Therefore, it is important to "slide" this page to the left until it either becomes Page 1 – or until all pages it is *after* are pages used for *both* sign in and sign out.

> To slide the page to the left, click the ◀ button just to the left of the "Options" button in Figure 3.

This completes the definition of the field the Sign Out Processor will use to recognize what activity the signer has requested.

When all checks out, click the "Close" button as shown at the top of Figure 2.

To continue configuring the Sign Out Processor, choose Tools → Toolbox in the main menu, and click the Props button for the "InnoVisioNate Sign Out Processor" object.

We can now proceed to the "Sign In/Out Indicator" in the Sign Out Processor settings. You should see a dialog as in Figure 5.
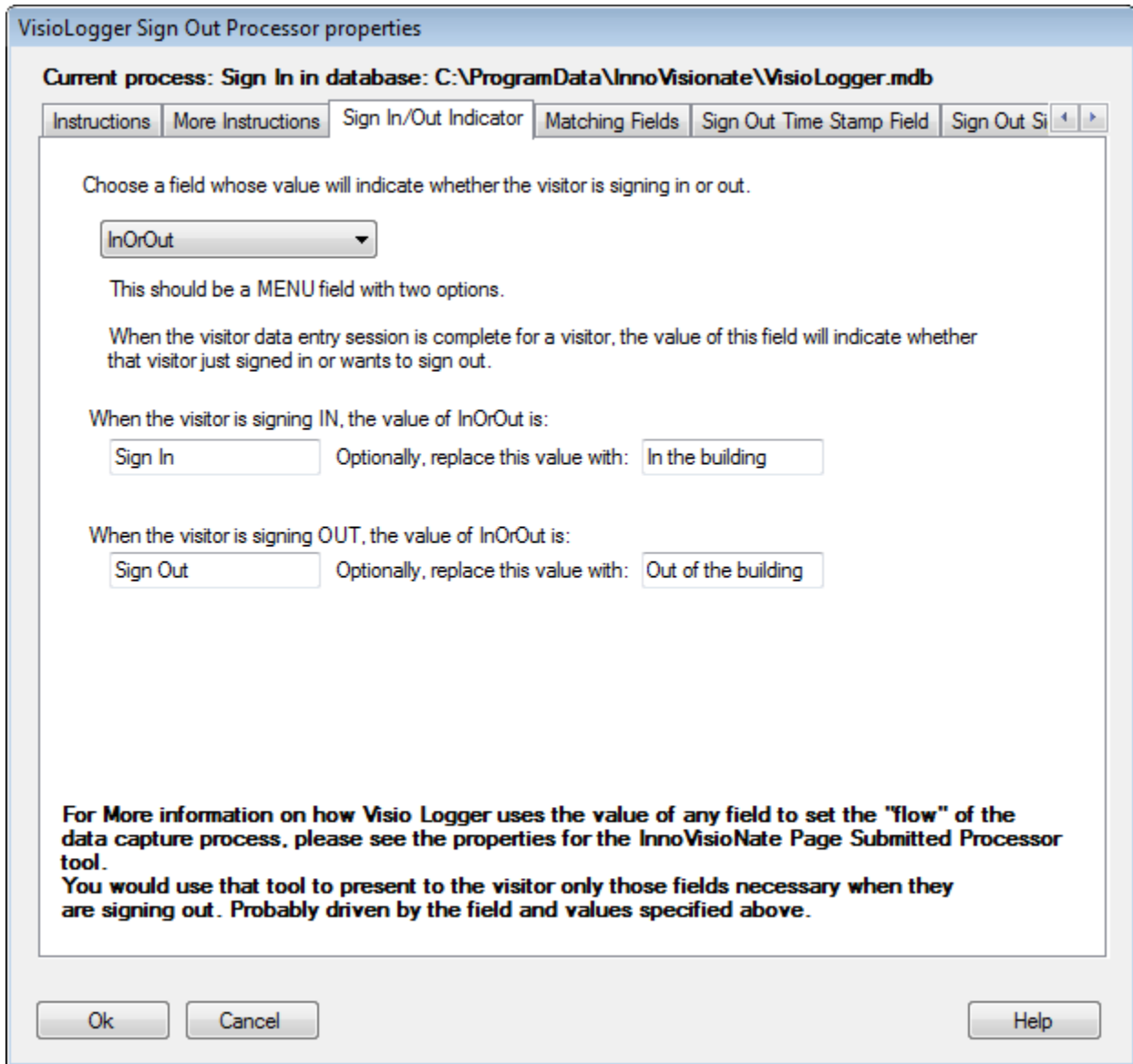
Figure 5 Setting the Sign In/Out Indicator

Note in the figure that we have selected our "InOrOut" field in the dropdown box at the top, and provided each of the two values we have defined as "options" for that menu field.

> **Note:** When the Sign Out Processor encounters the first data record after this value is turned on – it may need to create a field in the database. For this reason, when a NON MS Access database is being used. It may be necessary for a user with sufficient database privileges be configured into the database credentials.
>
> To set these credentials, select Tools → Database → Choose … from the Visio Logger main window, and enter the database credentials for the privileged user.

Then, exercise the system by signing in and then out at least one test visitor. After this, the database credentials could be set back to any database user with sufficient privileges to create rows of data.

In Figure 5, we show two optional settings. These are used to replace the InOrOut field with the specified value. This way, you can quickly peruse the Visio Logger data for the current day and see who is still in the building (or whatever information you want to put in this field). You could also do this by looking for the Action button(s) (described later), still existing on the data rows.

The Sign In/Out Indicator is configured. Now select the "Sign IN Field" in Figure 1.

Configuring the Matching Fields

The Matching Fields are one or more fields in your set of fields that will contain the values specified by the visitor.
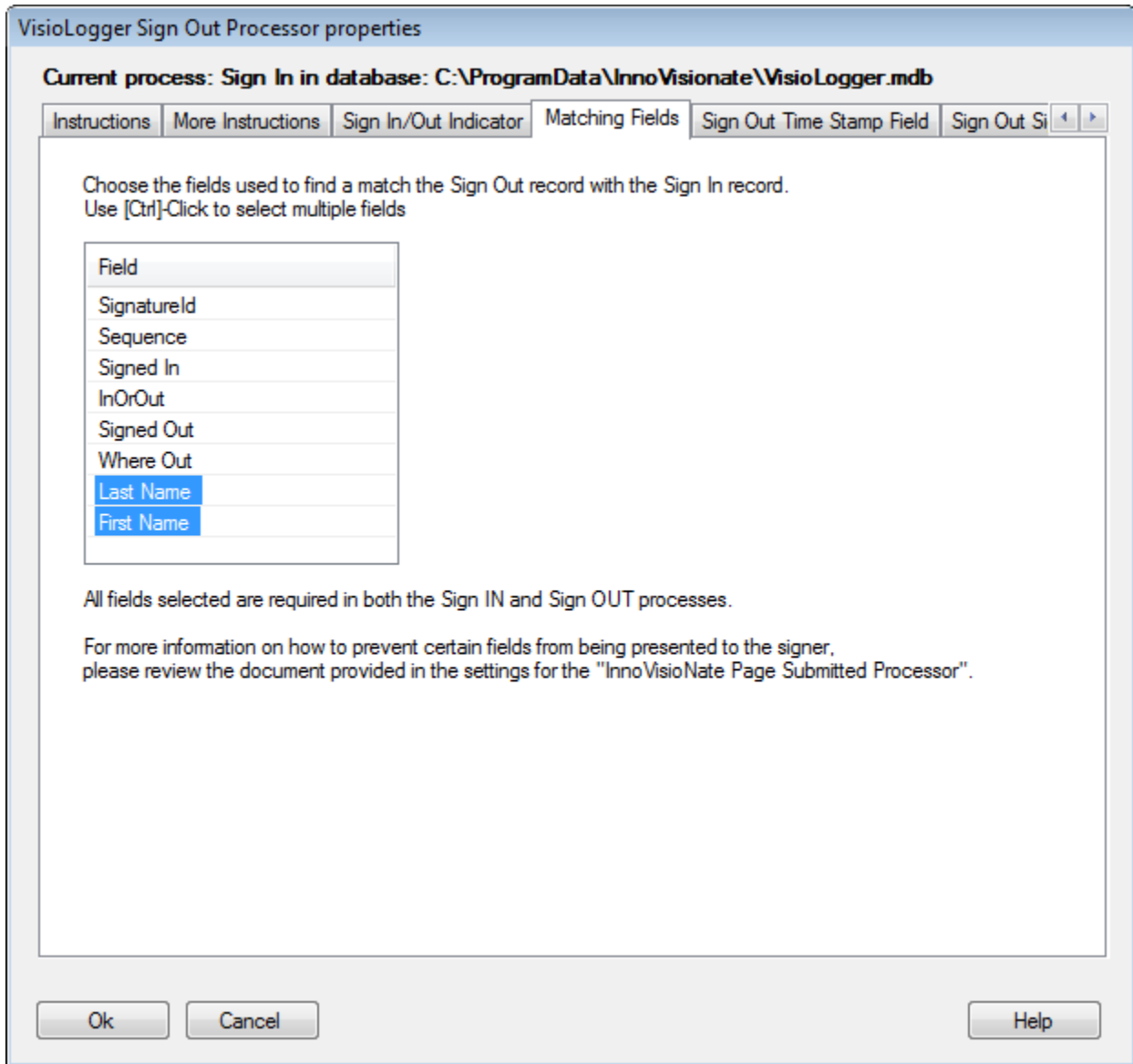
Figure 6 Configuring the Sign IN Field

You can use any combination of fields to match with. To select more than one field, press the [Ctrl] key and click the field. Clicking it again de-selects it.

Also note that whatever fields you define here must be collected from the visitor for *both* the Sign In and Sign Out processes. If this is not the case, the Sign Out process will never find it's matching Sign In Record.

Now, configure the Sign Out Time Stamp Field

Configuring the Sign Out Time Stamp Field

Visio Logger data can contain Action fields. These fields are used to Time Stamp the visitor data for any number of reasons. For example, any defined Action Fields show up in the rows of data for all visitors as

Buttons, which, when pressed, place the date and time into the appropriate cell, removing the button from view. Action fields can also be used to capture duration, and the name of the computer from which the button was pressed by some user.

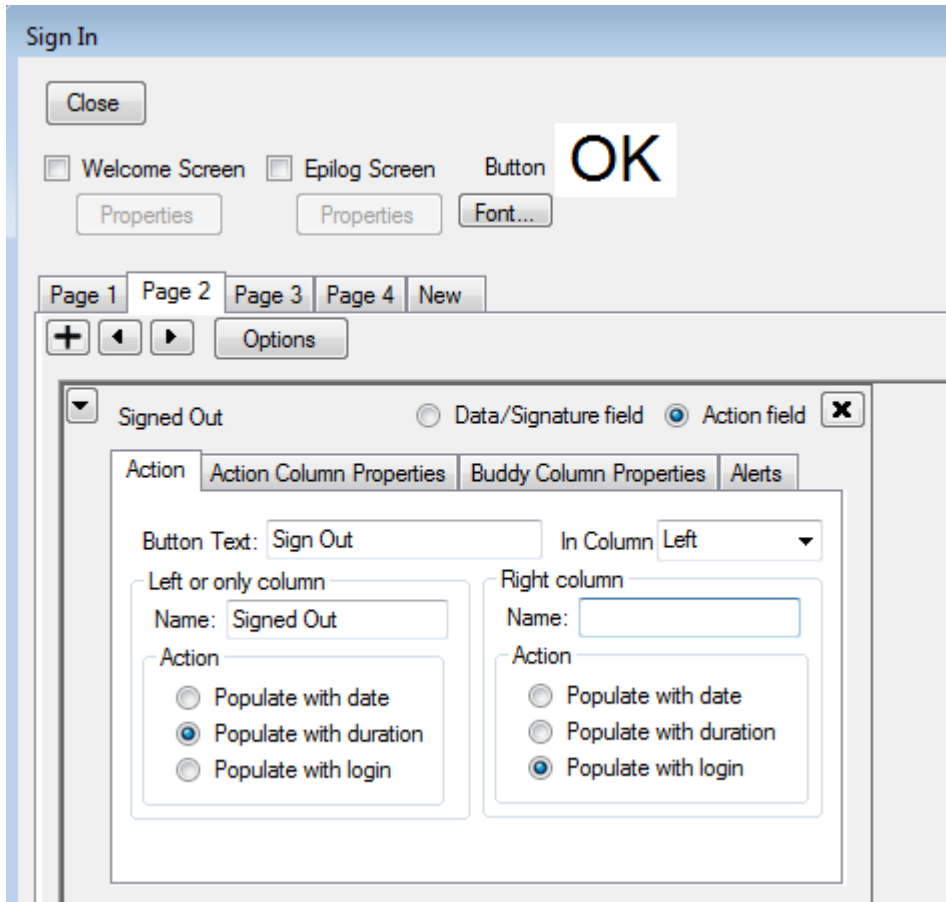In the current situation, we just need an action to mark the time that the visitor actually did sign out.

Figure 7 Partial view of Creating an Action Field

Note that we arrived at the dialog shown in Figure 7 by choosing Edit → Columns from the Visio Logger main menu.

It does not matter what "Page" action buttons are created on. For any page in your set of pages, press the "+" button underneath the "Page #" tab, and be sure to click the "Action Field" option as shown in the middle right of Figure 7.

In our example, we have given the field the name "Signed Out" – and the system will create a button for each row with the label "Sign Out". Do not confuse the field name (to the right of "Name:" in the "Left or only column" group), with the Button Text, which simply indicates to any computer user viewing the Visio Logger data what that button will do. Remember that any computer on the network with at least a license for Visio Logger in Viewer Mode can view and act upon these actions.

Now, once again in the Sign Out Processor settings, we select the "Sign Out Time Stamp Field", and specify the field we just created, as in Figure 8.
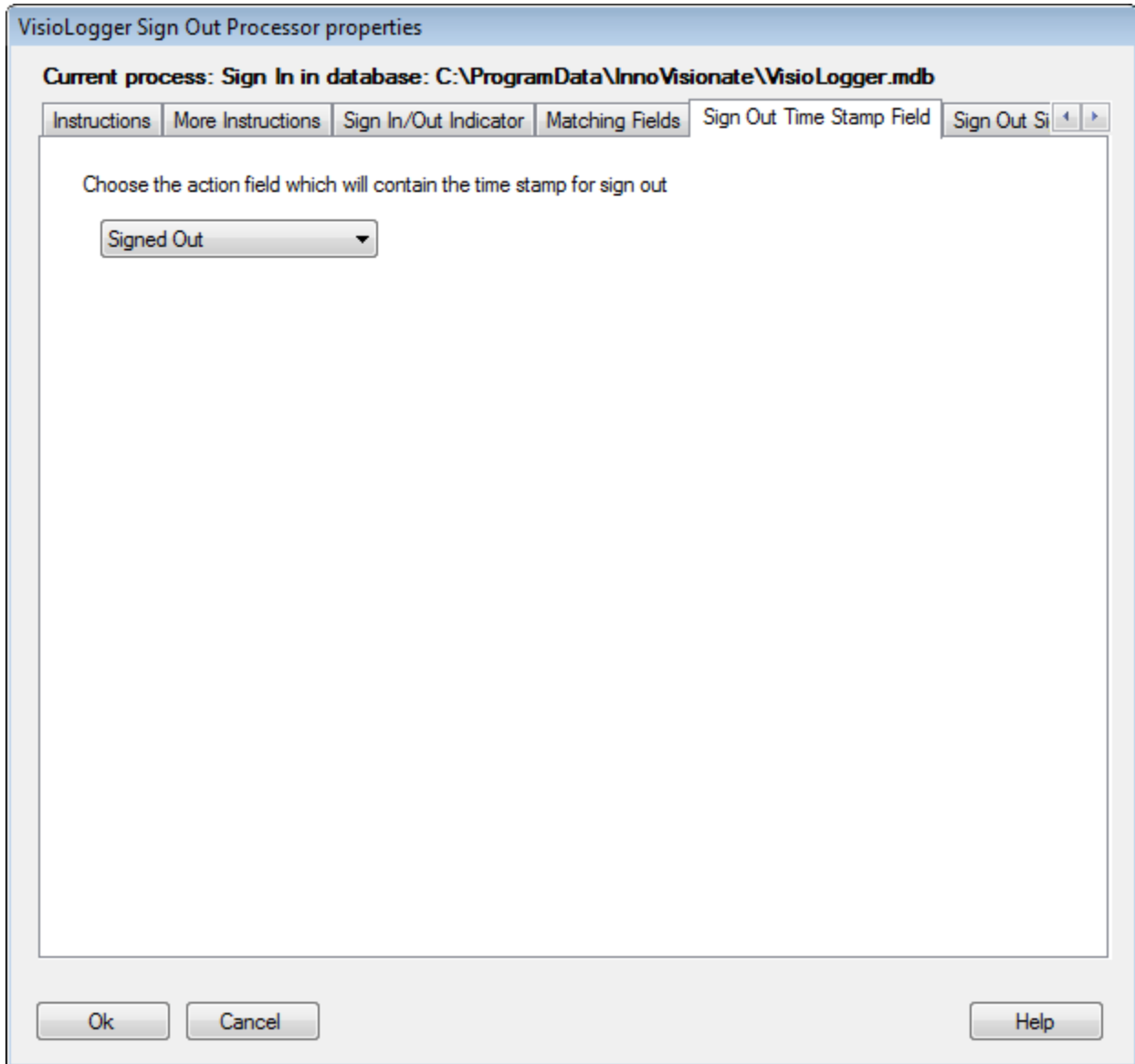

Figure 8 Configuring the Sign Out Time Stamp Field

Configuring the Sign Out Signature Field

This setting is optional and is used to allow both sign in AND out signatures to appear on the visitor's row of data.

First, we need to define a *separate* signature field for this purpose within the set of fields. To do this, once again, choose Edit → Columns from the Visio Logger main menu.

This exercise is much like creating any field, except that you want to be sure and enter the field name into the "Field Name:" entry box on the *Signature Field* tab of the field definition.
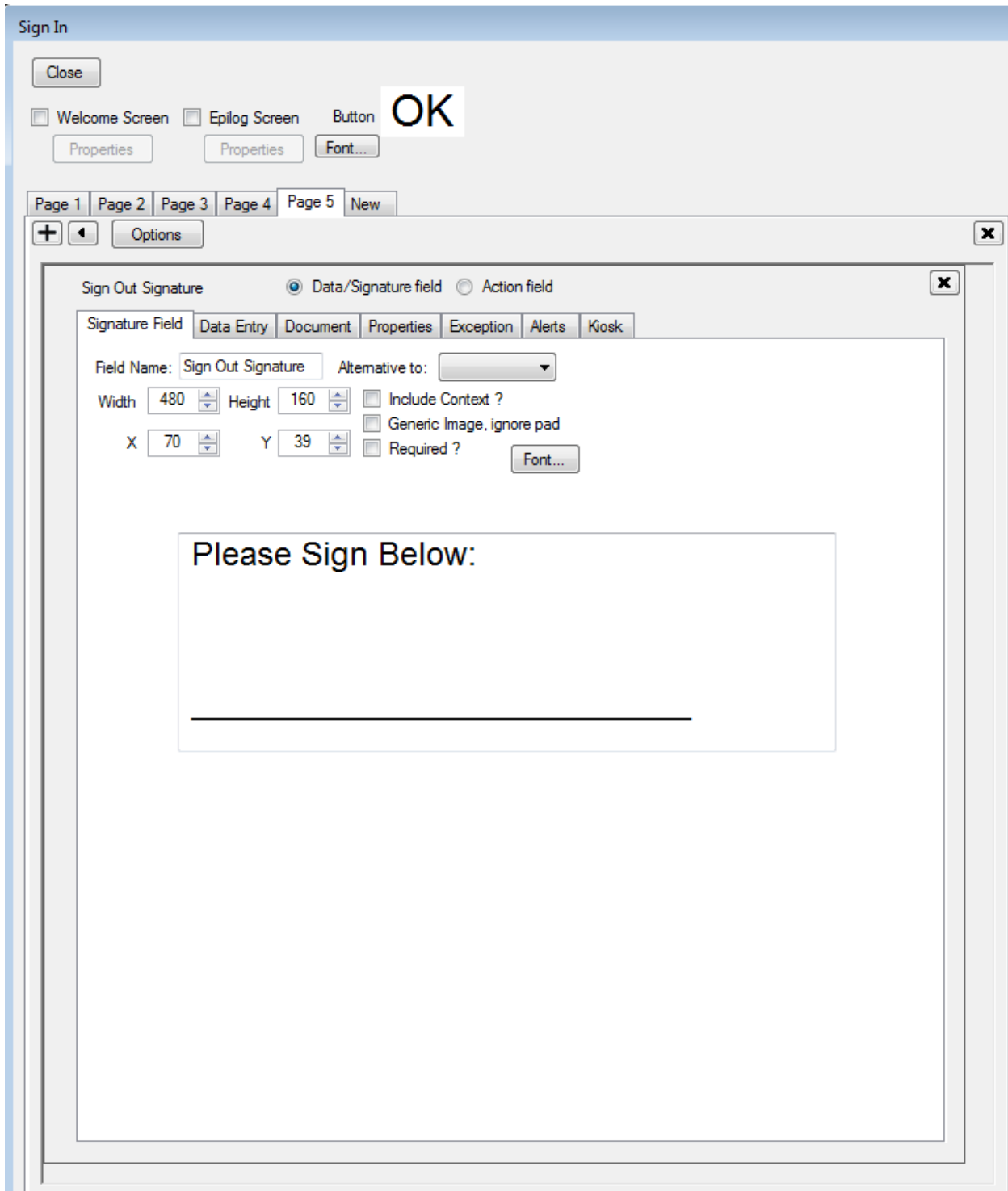
Figure 9 Partial view of creating a Signature Field

Additionally, again within the settings for the InnoVisioNate Page Submitted Processor, you want to prevent the collection of this signature field during Sign IN processing, and likewise, prevent the normal sign IN signature (if there is one) during Sign OUT processing.

If you have a Sign Out Signature field defined, choose it in the dropdown as shown in Figure 10
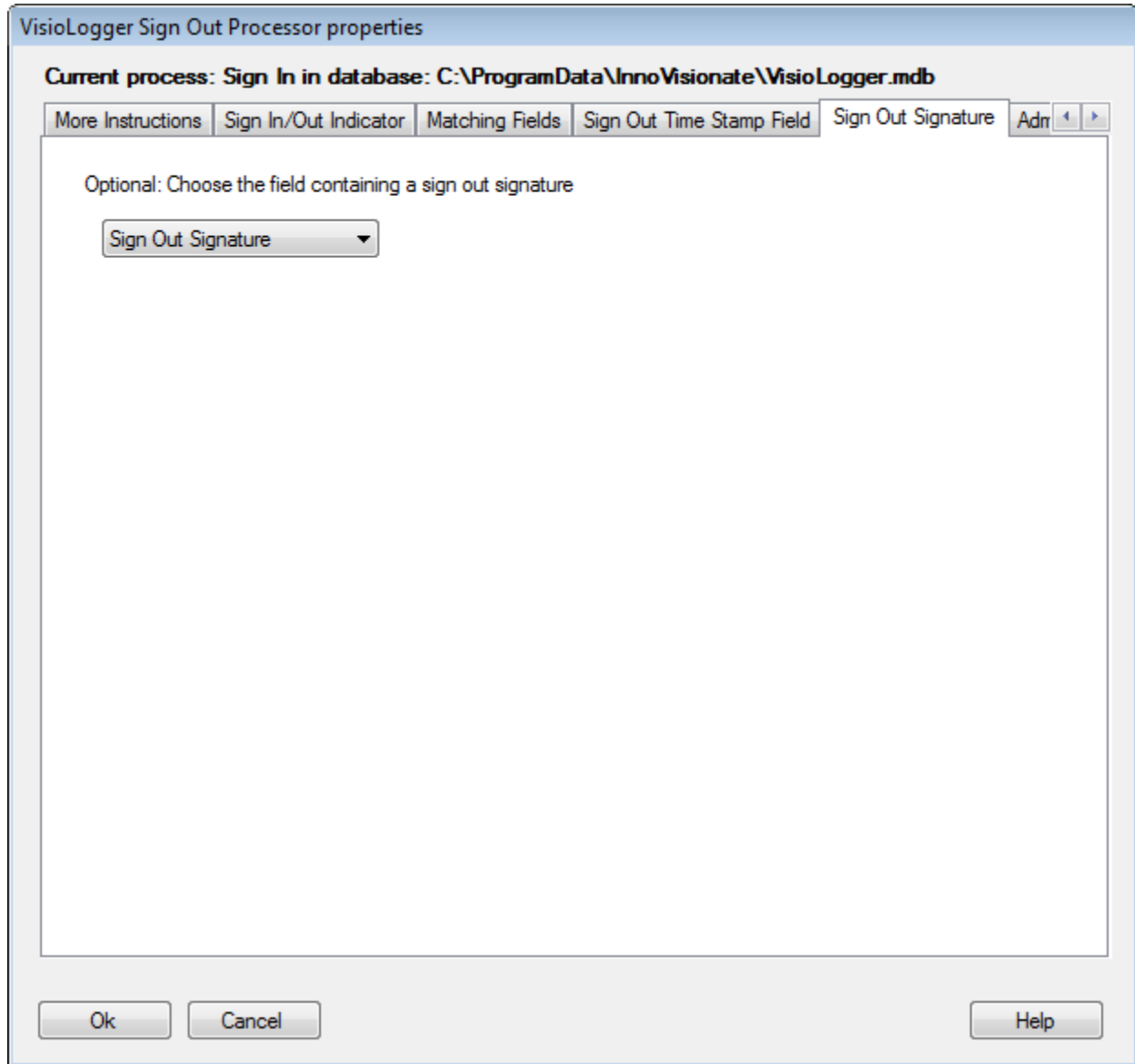

Figure 10 Configuring the Sign Out Signature Field

Note that we simply chose the name of our field as "Sign Out Signature", this can be any name desired, it is only a coincidence that it is the same here as the name of our configuration settings tab.

If, in the future, you decide not to collect a signature on sign out – simply change the entry in the dropdown to "<none>" and delete the column from your set of fields (Edit → Columns).

Configuring Administrative Email settings

For some period of time after setting up the automated Sign In/Out processes, it is a good idea to have the system notify someone if there is a problem.

Typically, Visio Logger will not report errors to the computer user who may be at the computer running the data collection activity. This would cause the activity to stop, which should continue in the event no one is there to respond (the visitor/signer typically will not see the computer monitor and/or have access to its keyboard or mouse).

Therefore, you can configure an individual to e-mail problem reports to as they are encountered.
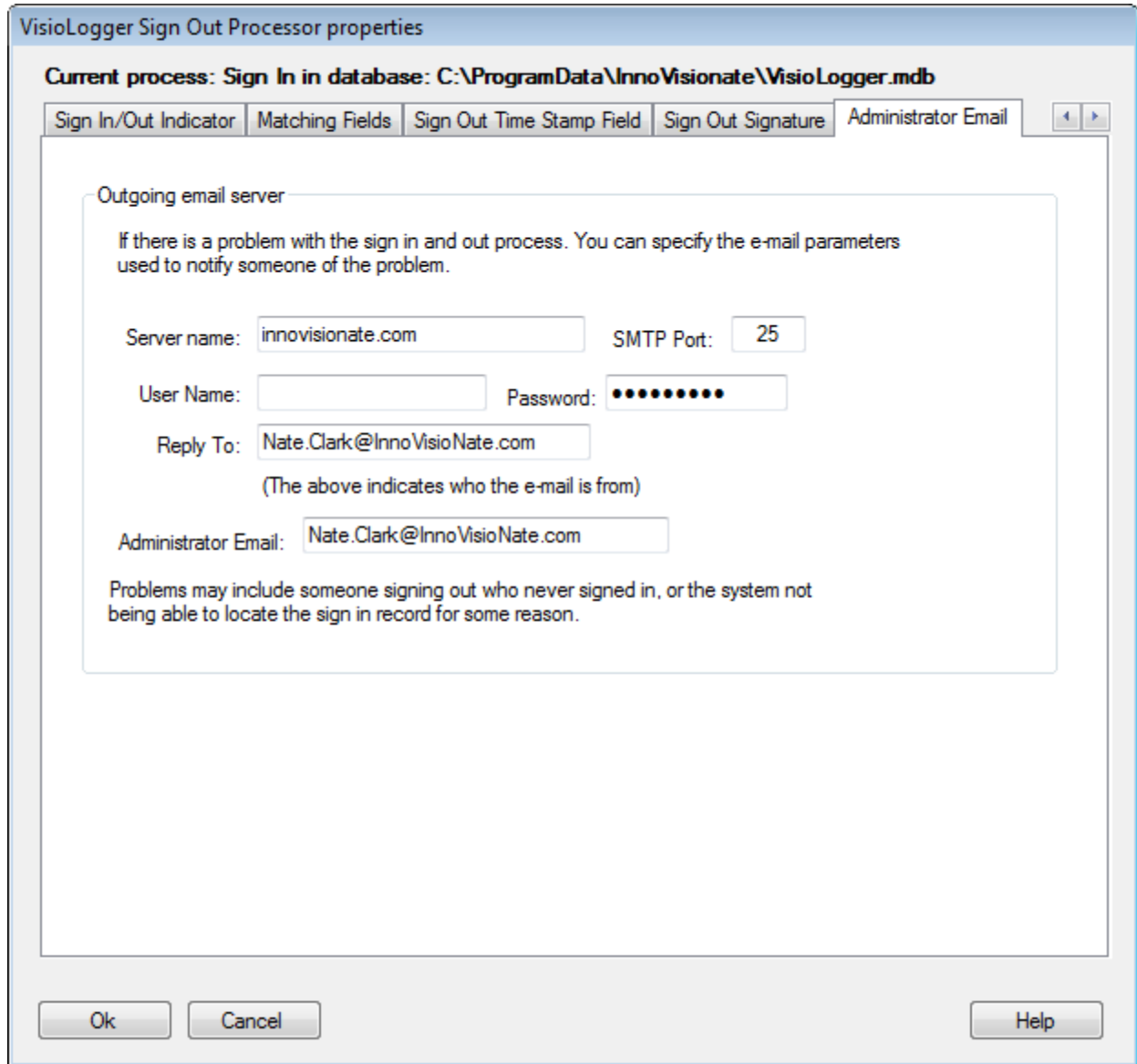

Figure 11 Configuring an administrator email

Unless the Sign Out Process is not configured correctly, the only messages the administrator is likely to get are when a user requests to sign out – but they either never signed in, or the system was not able to find the matching sign in record.

In any case, if this happens too often, you might choose a different type of value to specify as your Sign IN Field (and the Sign OUT Field if appropriate).

Note that the system sends the e-mail directly to the e-mail server specified using SMTP – it does not instantiate the local e-mail client in order to create the e-mail. Therefore, no e-mail client need be installed on the Visio Logger machine.

Saving the Configuration

The configuration file you have created with these settings is stored in the local machine's ProgramData directory. Upon exit from the properties dialog, the system will present the following question:
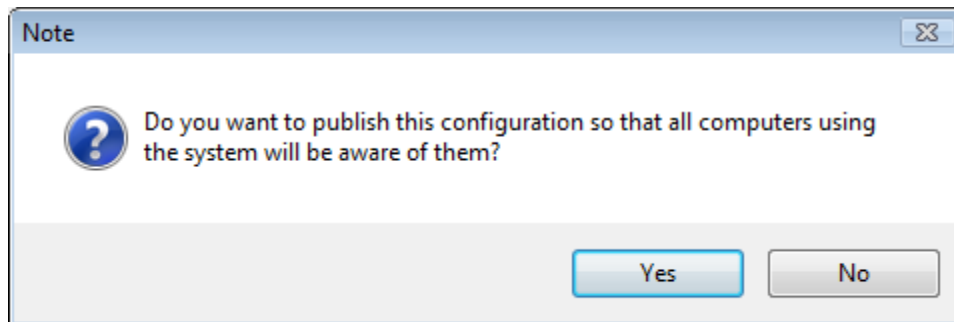

Figure 12 Prompt to save the configuration

What this option does is to store the configuration file directly in the current database in use. This way, when *another* computer on the network is using that database, and the option to use the Sign Out Processor is selected on that computer – the Sign Out Processor will, at the appropriate time, check for an update to these settings and put them into effect on that other computer.

Summary

This completes the configuration of the InnoVisioNate Sign Out Processor.

To see it in action, be sure to check the option to the left of the name of the processor in the Tools → Toolbox dialog.