Using the InnoVisioNate Badge Printing Tool

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What is the Badge Printing Tool?

At the conclusion of a visitor sign in, you can use this tool to print a badge for that visitor.

Though we use the term "Badge", it should be noted that all this tool knows about the specific printer is the dimensions of the label stock being used, and that the hardware is shipped with a standard windows print driver that properly accounts for this stock. Since the label dimensions are configurable in this tool, one could, In fact, set them to 8 ½ by 11 inches and create a simple report for every signer off of any standard windows printer.

Accessing the Badge Printer properties

As with all Visio Logger integration tools, you can set the properties for this one by selecting Tools → Toolbox from the main menu (when running as administrator on the computer).

You will see the Toolbox configuration window, the right side of which is shown in Figure 1.

Note that the figure only includes the right side of the dialog and that we have circled the two points pertinent to the discussion.

By selecting the "Use ?" option in the Badge processor entry (in the "After the record is complete…" group), we indicate that after every signer has finished submitting data, this tool should execute.

Figure 1 Specifying the Badge Printer tool - partial view

By selecting the button under the Props column for the tool, we see the Badge printer properties as in Figure 2.
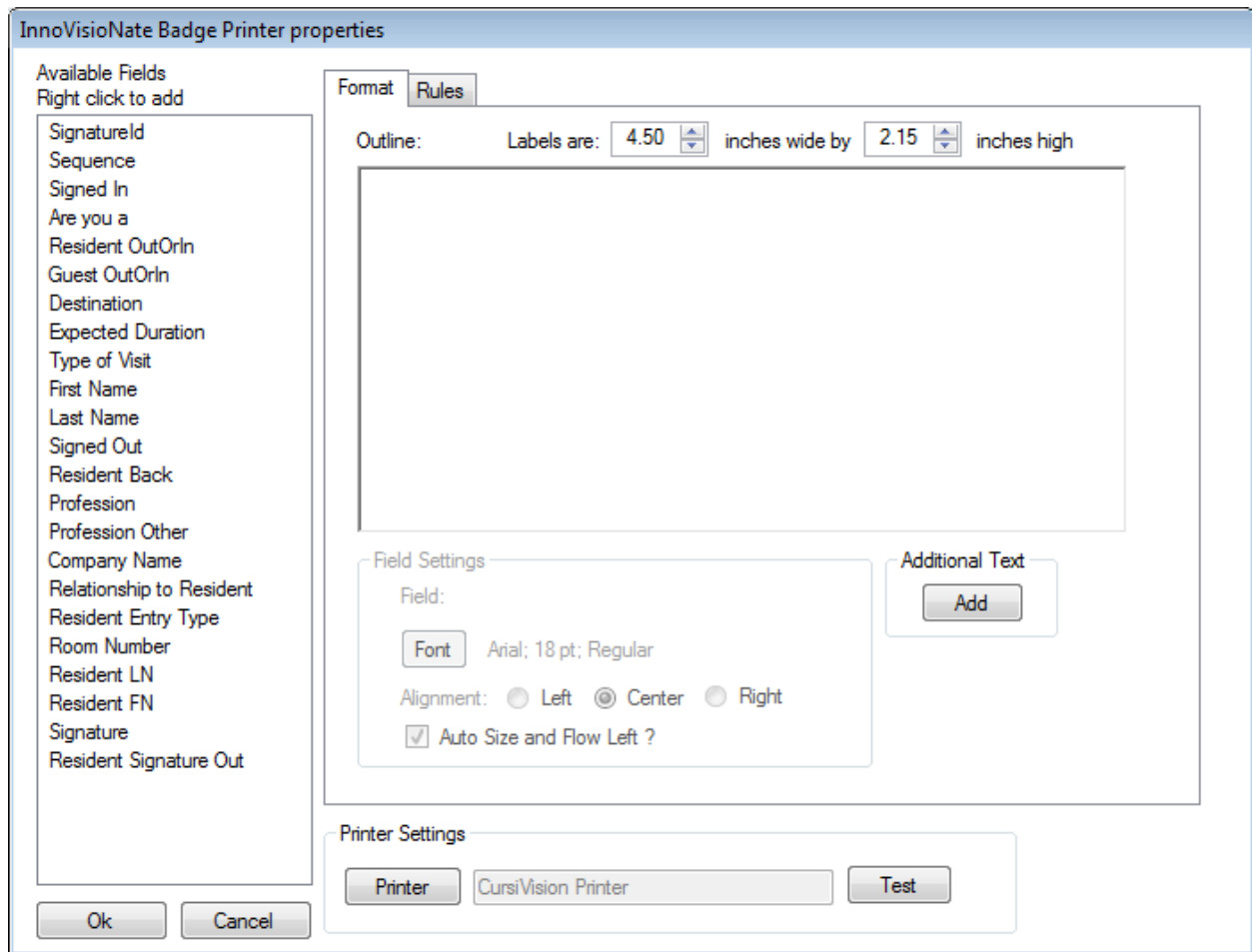
Figure 2 Badge Printer Formatting Area

To the left side of the figure we can see the available fields defined for our sign in process. In the top right, we have a "formatting area" into which we will place these fields and re-arrange them into our final Badge configuration.

Also, we have specified that our badge label stock is 4.5 inches wide by 2.15 inches high. The formatting area will occupy exactly these dimensions on the computer monitor. You can adjust these to any size desired or supported by the particular printer you are going to use.

Please note that Visio Logger is storing the configuration of this particular tool IN the database *as well* as on the local computer. Several InnoVisioNate tools do this in order to facilitate enterprise wide configuration so that all Visio Logger computers can automatically see updates without having to configure each tool on each computer.

Additionally, these configurations are maintained on a per *Database* and *Process* level. This means that you can configure a different set of properties for different databases and processes within them without fear of conflict across databases. To clarify, a "process" is a particular set of field definitions within a database. Typically, a database has only one process, but there is no restriction on this.

Creating Supporting Text fields

A supporting text field is just text that you provide as desired to appear on the badge.

We will create our first one by clicking the Add button in the Additional Text group in the middle right of the Figure 2.
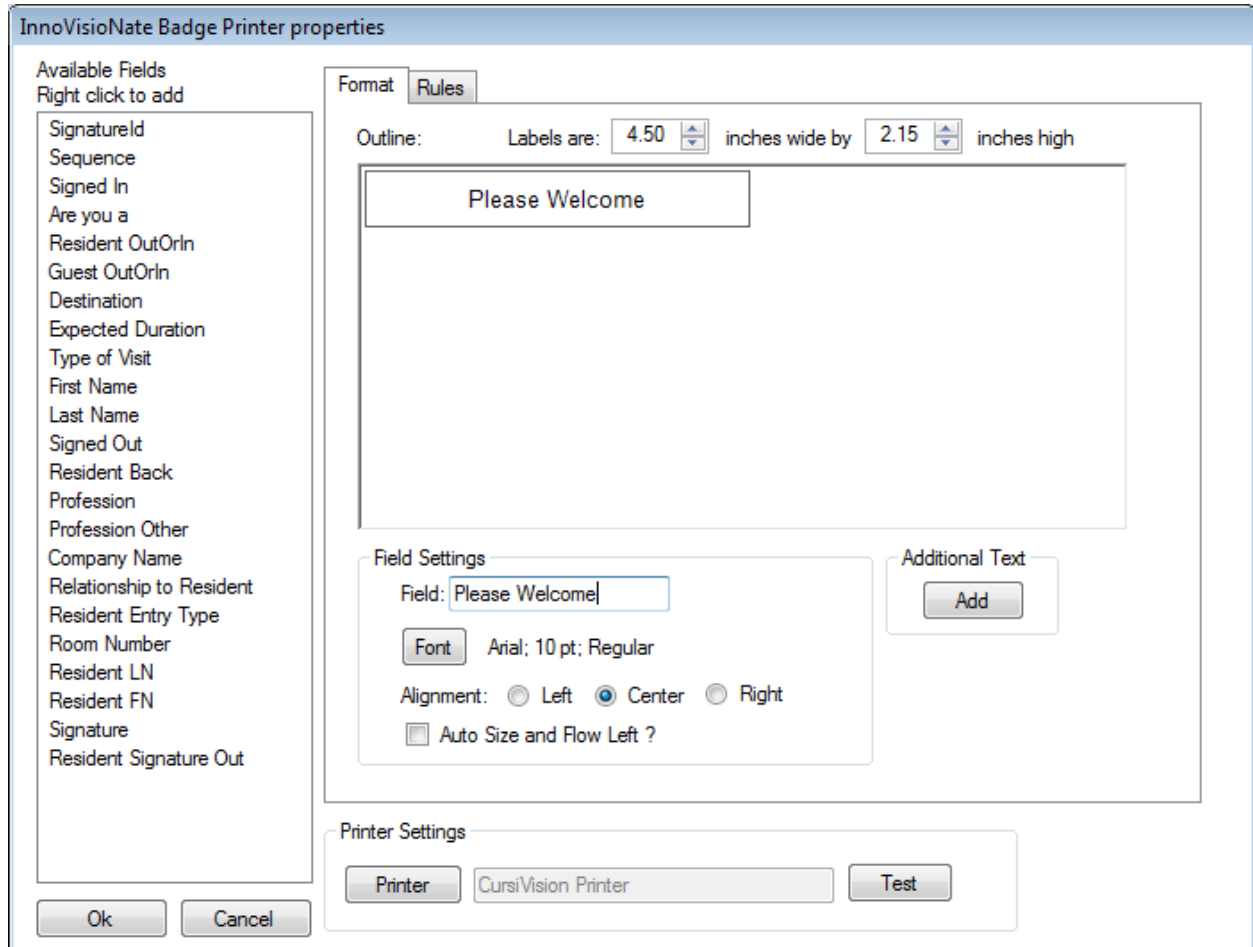

Figure 3 Adding additional text

Whenever you Add text, the system places that text in the upper left of the formatting area, and provides an entry location for the text value within the "Field Settings" option group. In our case, just after clicking Add – we entered "Please Welcome" into that text value. You cannot "edit" this text in the formatting area, you change its value in the "Field:" entry.

Now, we can set the Font for our text, some formatting options, and move it around to where we want it. Having set the font to Arial 18 pt and specified the text should Left Align, we then clicked and dragged the text in the formatting area down and away from the upper left, arriving at Figure 4.

Finally, we can set the *width* of the text field by clicking on the right or left edge of its image in the formatting area, and dragging left or right as appropriate. Be sure to have the font set correctly before

doing this. You can also set the height as well, however, there is no obvious reason why this would need to be done.
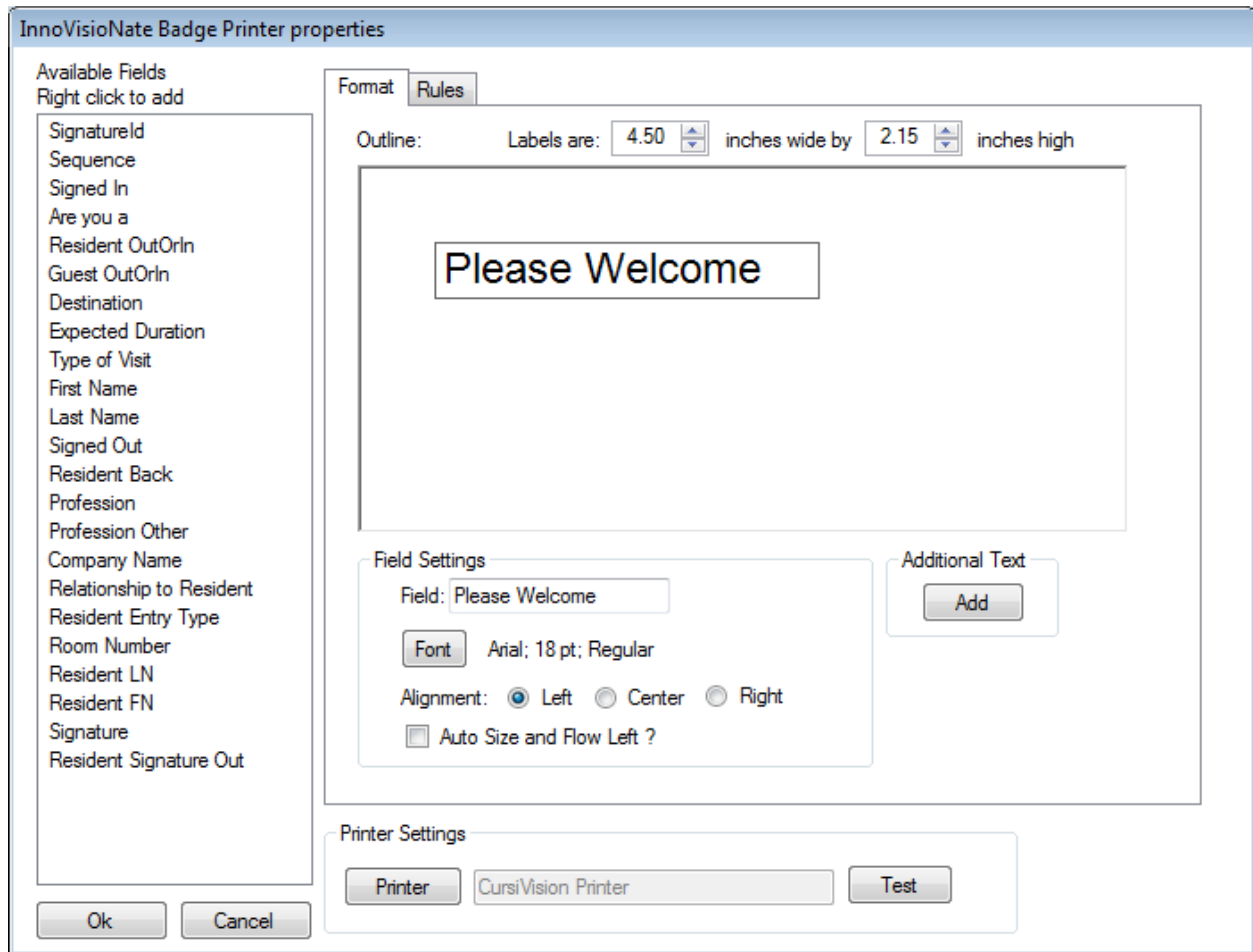

Figure 4 Additional Text Formatting properties and location

All of the options (except moving) are set in the "Field Settings" option group. Note, we moved the text away from the upper left because, when we create new text or fields, they will be placed there and we want this text to be out of the way for now.

Creating a Data Field entry

In the list to the left, we have the data fields defined for the current database and process.

We click on the one we want to add, right click the mouse, and choose Add from the menu, this places that field in the upper left of the formatting area. Once again, we set its properties in the Field Settings group, however, this time, we cannot change the value of the text, and the "Field:" entry is not editable. By clicking and dragging, we've moved this field down in the formatting area. For this field, we want to "Right Align" the text, and we want the right edge of the entry to be about in the center of the area.
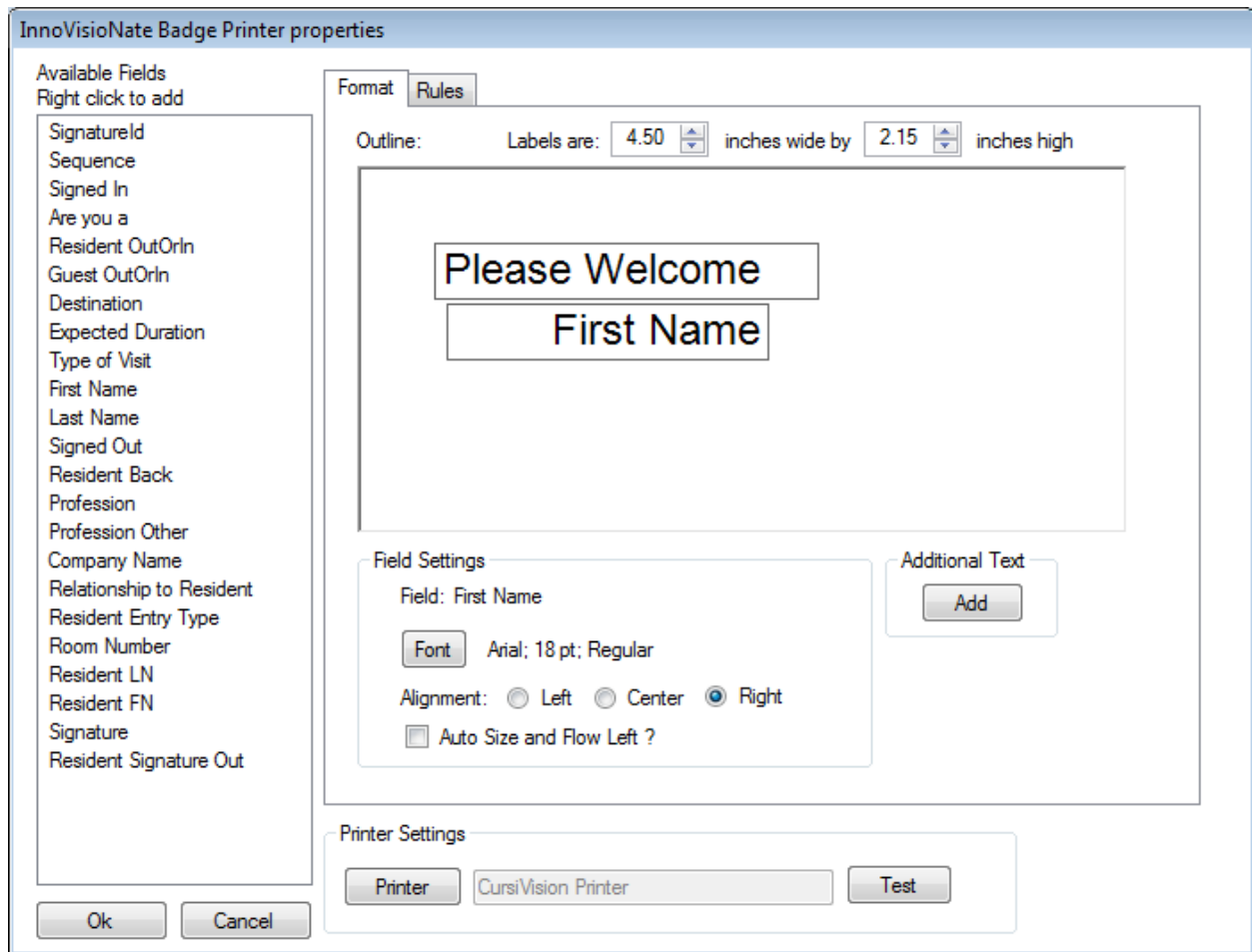
Figure 5 Using a Data Field

Note that clicking on anything in the formatting area switches the "active" settings in the field settings group to *that* item. If the item is "additional" text (i.e., not a field), we can then change the *content* of that field.

Adding Last Name to the mix, setting its font, Left Aligning it, and moving it to where we want it, we finally arrive at Figure 6.
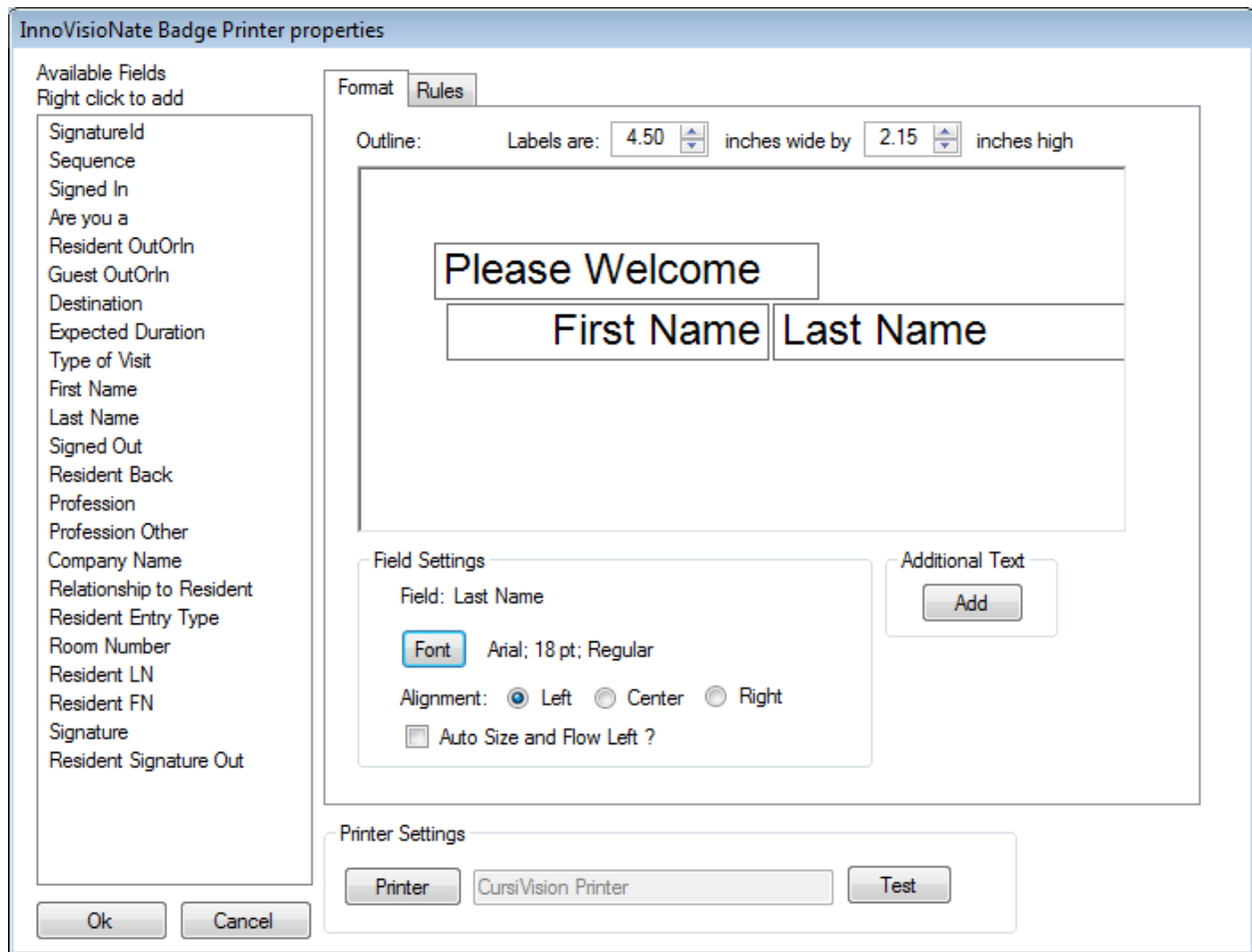
Figure 6 Centering combined fields

Note how we have combined first and last name in such a way that they will appear as one field nicely formatted directly in the center of the badge.

Adding a Signature Field

The system knows which fields in the left list are image fields, rather than text fields. With these, you can't change the text settings, but you *can* indicate the size and aspect ratio of the field.

Right clicking a signature field in the left list, and choosing add will place that field on the formatting area, *in* the aspect ratio that the field is defined in your data.

We've added the Signature field to the formatting area, and, once again, moved it out of the way for additional fields to be added.
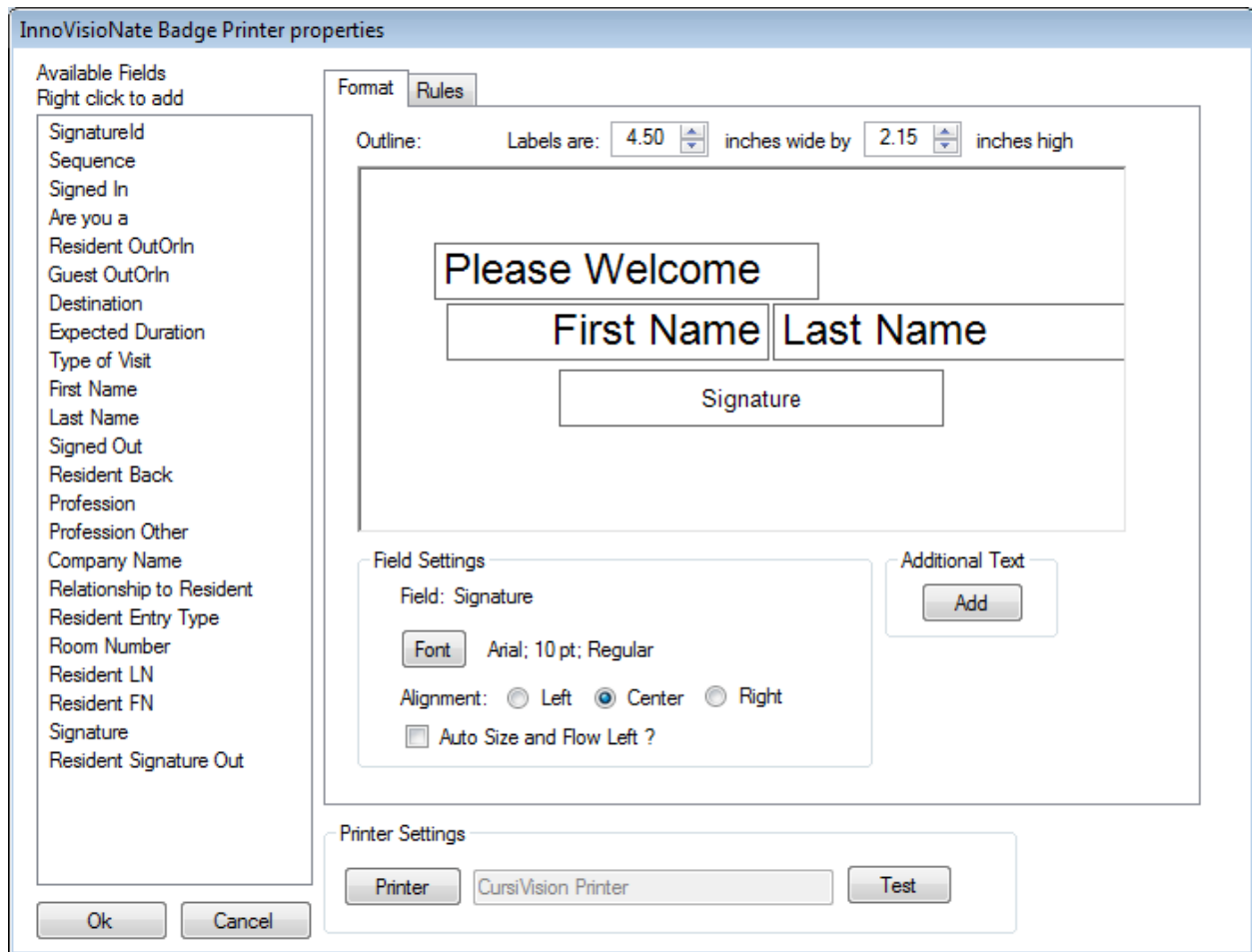
Figure 7 Adding a Signature Field

More text options

Sometimes, you need text to line itself up left to right when the actual values (recall that the data fields are only placeholders for the field "values" that will exist at runtime) are placed on the badge.

During this design activity, it is not possible to know what the resulting "width" of each field will be, since the values will have varying length.

To achieve the desired result, we need to use the "Auto Size and Flow Left ?" option in the field settings group. First, we'll an additional text field in the bottom left with the value "Visiting:".

After this, we will add the "Resident FN" (Resident First Name) field and move it just to the right of the prior field, and, finally, we add the "Resident LN" field somewhere to the right of the Resident LN field.
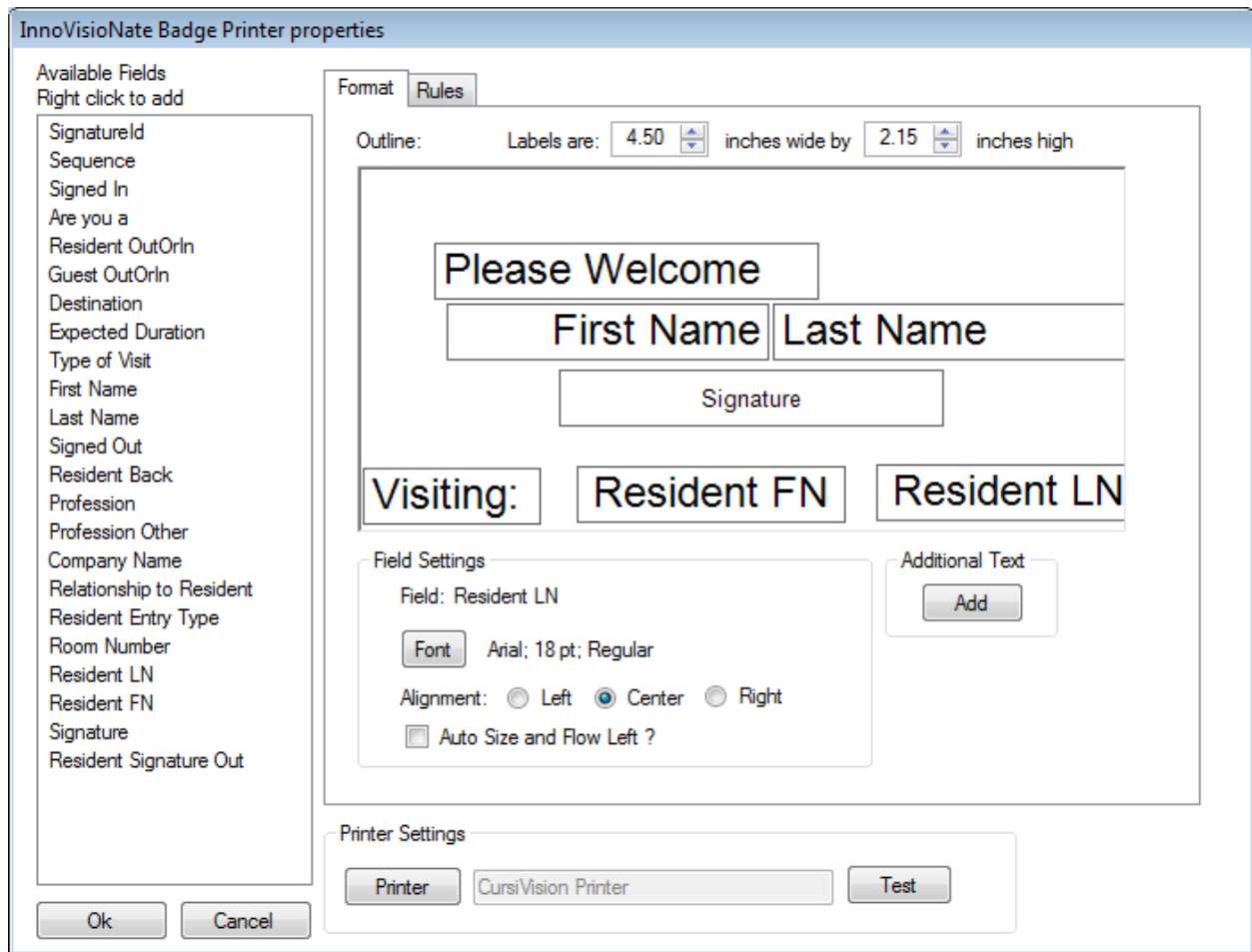
Figure 8 Before using Auto Size and Flow Left

Figure 8 shows our formatting area after the above steps, our Resident First Name and Last Name fields have spaces around them that would not look right on the printed badge.

Therefore, we click each of these fields, and select the "Auto Size and Flow Left ?" option in the Field Settings group.

And finally, these two fields will shift as far left as possible and, at specific badge printing time, will result in both of them being next to each other as well as just to the right of "Visiting:", no matter the size of the names that ultimately appear in them.
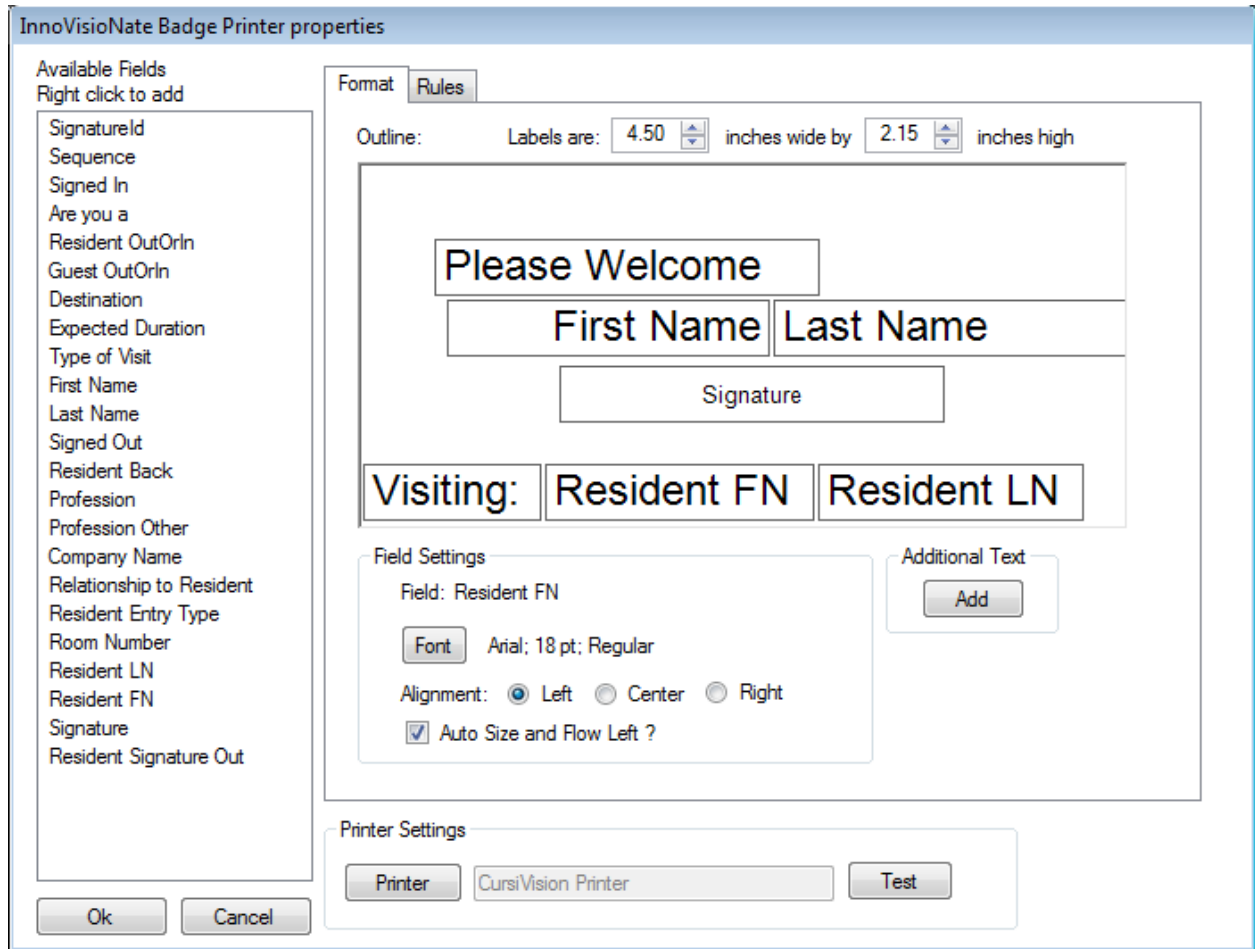
Figure 9 After using Auto Size and Flow Left

Now we can arrange our final format by moving fields around, and resizing the signature to obtain the final design.
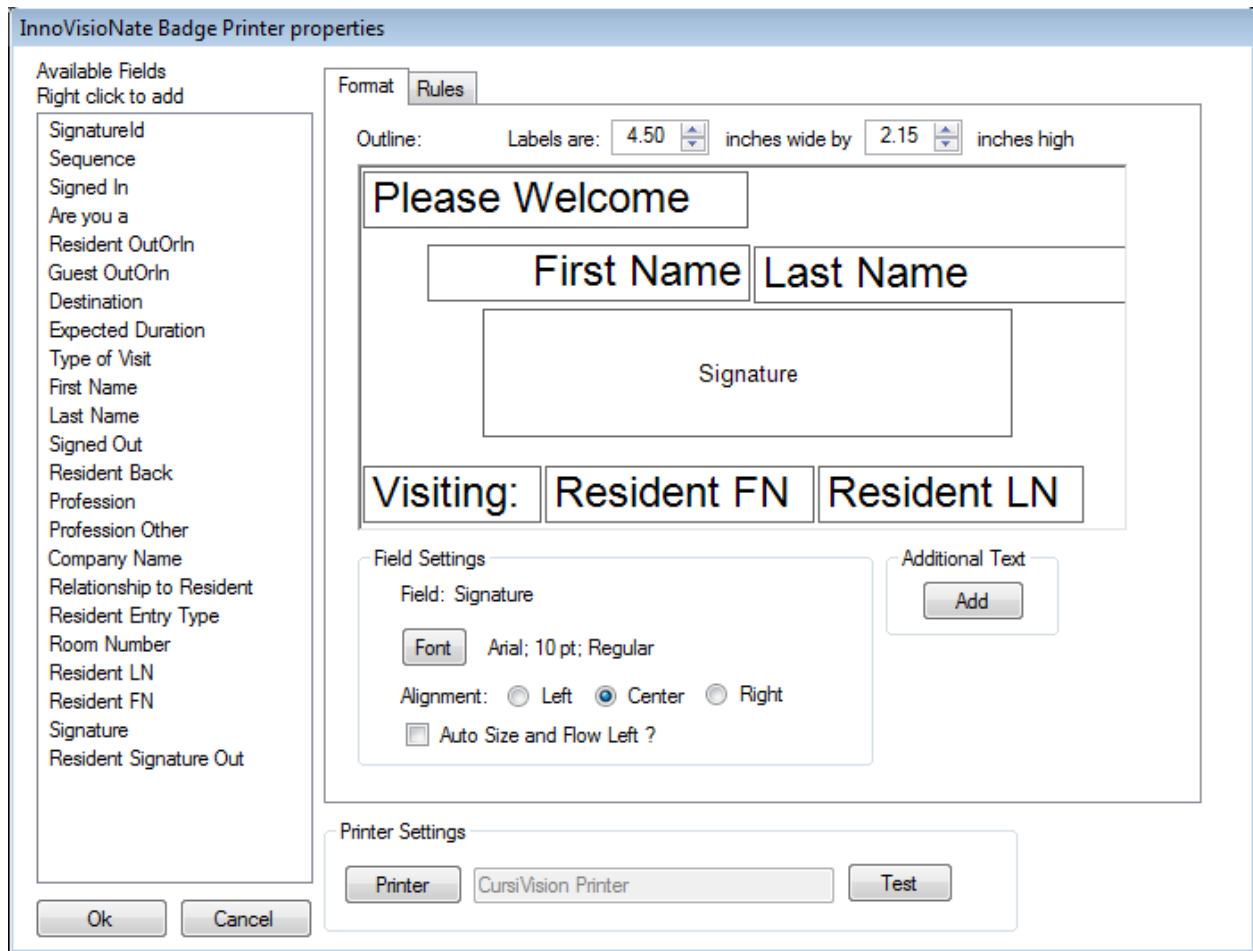
Figure 10 Final Design

Inclusion and Exclusion Rules

Figure 11 shows how to *selectively* print a badge based on the values of the fields provided by the signer. In some cases, you may not want a badge for every visitor. For example, someone on a "Personal" visit may not need a badge, but those on a "Professional" visit should have one.

Inclusion rules are available for you to configure the system to print a badge when a specified field equals a specified value.

Exclusion rules are available for you to configure the system to NOT print a badge when a specified field equals a specified value.

Inclusion rules always trump exclusion rules. In other words, if any one inclusion rule passes the test (is true) a badge will print *even if* one or more of the exclusion rules passes the test.
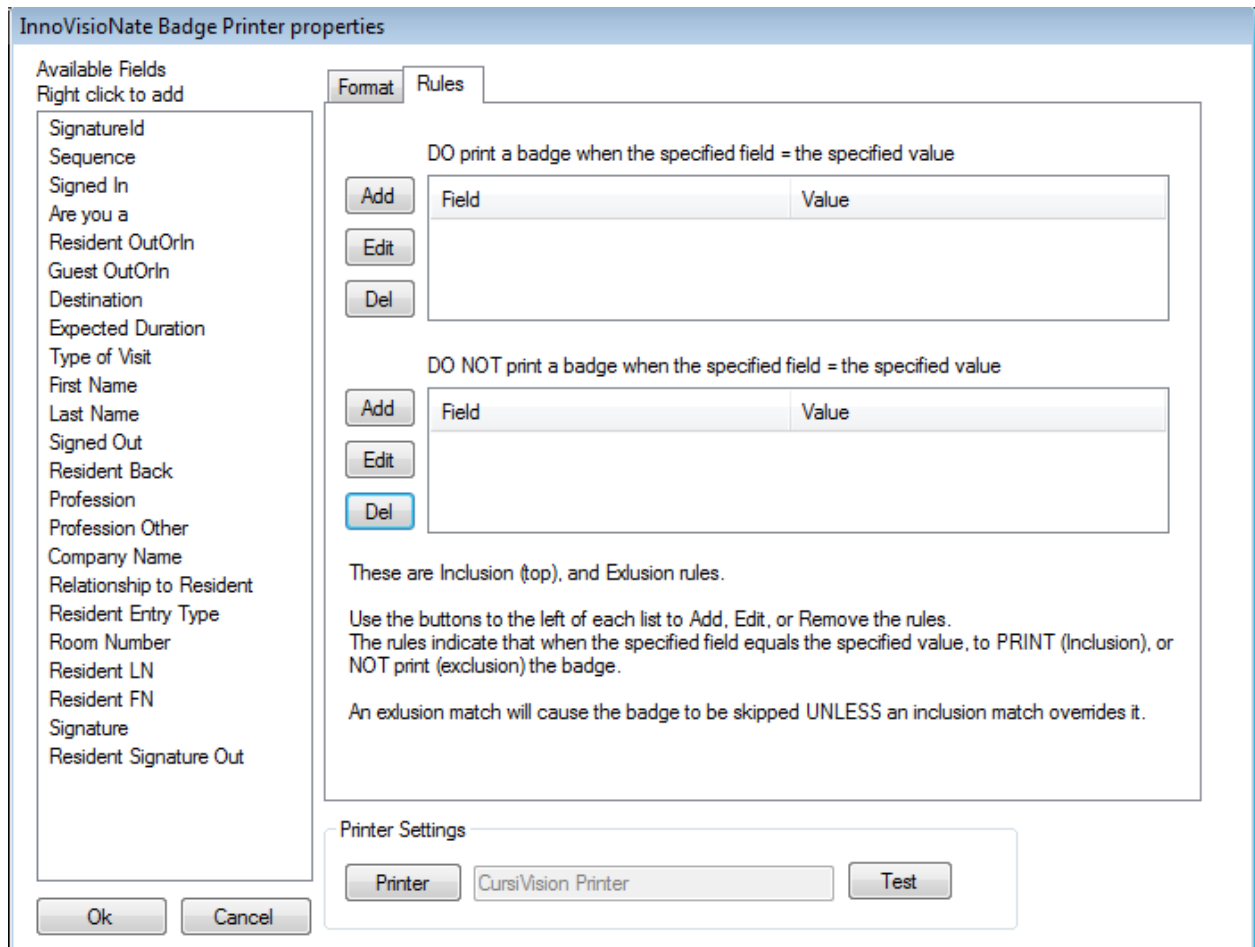
Figure 11 Inclusion and Exclusion Rules

An example is in order.

To add an inclusion rule, click the Add button to the left of the *top* list in Figure 11.

In the dialog that appears, choose a field from the list of fields, and provide a potential value for that field.
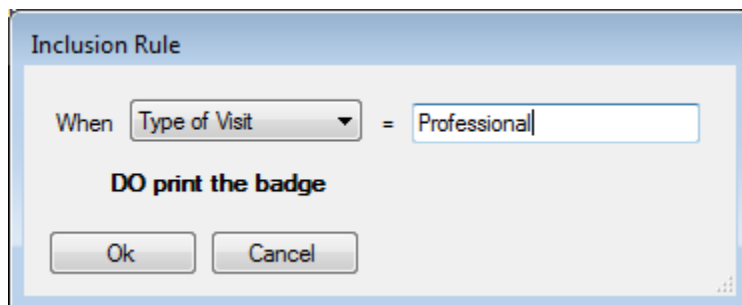

Figure 12 Inclusion Rule

In the above, we are saying that *when* the Type of Visit field *equals* the value "Professional" *then* print the badge.

To add an exclusion rule, click the Add button to the left of the *bottom* list in Figure 11.
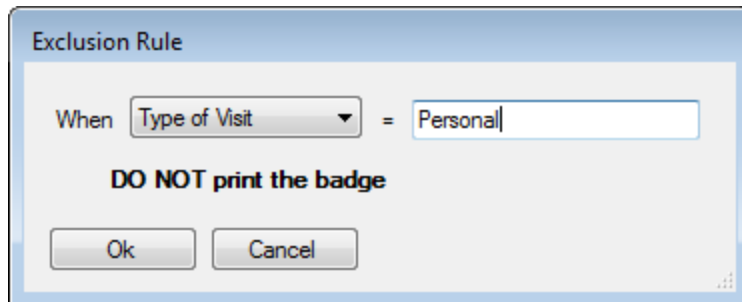

Figure 13 Exlusion Rule

In our *exclusion* rule, we say that when Type of Visit *equals* the value "Personal" *then* do **NOT** print a badge.

Incidentally, note that the field we have selected to use is a *menu* field in our fields definitions. Typically you want to use a menu field since the value it will have is 100% predictable, that is, the signer will not be able to misspell the value.

Which type of rule should you use?

The answer depends on the possible values for your chosen field. If only *one* of the available values is one where you *want* a badge, use an *inclusion* rule for that field.

If *more than one* of the available values are values where you *want* a badge, then use *exclusion* rules for the *other* values where you *don't* want a badge.

Choosing a printer

Do not to forget to choose the appropriate printer for your badge. Note that, during test and setup, you can use any printer to avoid wasting badge labels until you get the format properly adjusted. Your badge would appear at the top left of a sheet of paper.

However, in production, choose the printer instance for your badge printer that would have been created when you installed the printer.

Note, this printer selection is shown at the bottom of Figure 2. At any point, you can click the "Test" button to see how your badge might print, however, the content of the fields will not be those of runtime data. An alternative test option is to select the test button shown in Figure 1 after saving your configuration by clicking Ok in Figure 2.