



Using the Visio Logger Document Management Features

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Document Management Features

The Visio Logger Document field has many powerful uses.

The simplest use of the field is to copy a *template* document into the field as soon as the visitor enters their first page of data. Keep in mind that Visio Logger is actually storing the document *in* the database; there is no external file store that requires additional configuration or management.

Since the document is from a template, all visitors would have the same document associated with them, that is, initially. In this document, we will describe ways to *modify* the document(s) so that they become relevant to that visitor.

First, we describe how to create a document field.

Creating a Document Field

When running Visio Logger as administrator (right click its icon and choose “Run as administrator”), choose the Edit → Columns menu item.

With an empty Visio Logger database, you would see Figure 1.

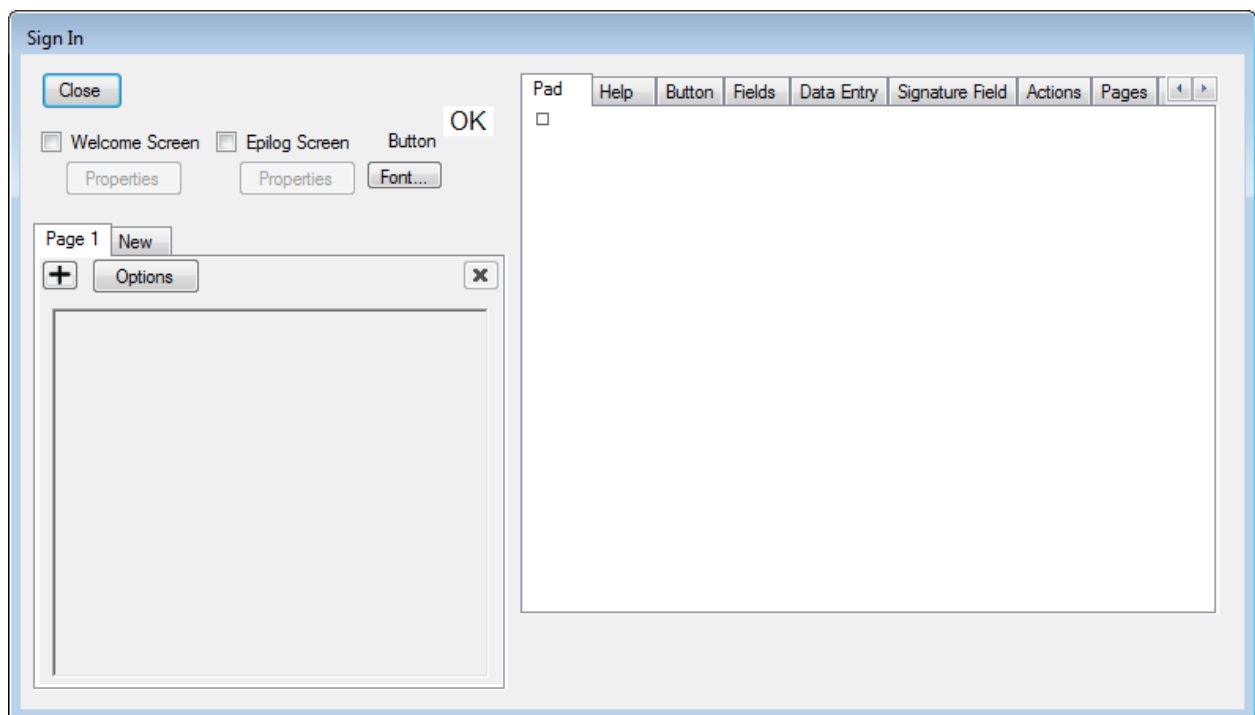



Figure 1 No columns defined

In the above, click the  just beneath the “Page 1” tab in the upper left, this will create a new field on Page 1 (you can put document fields on any page, they do not use the signature pad or require input by the visitor).

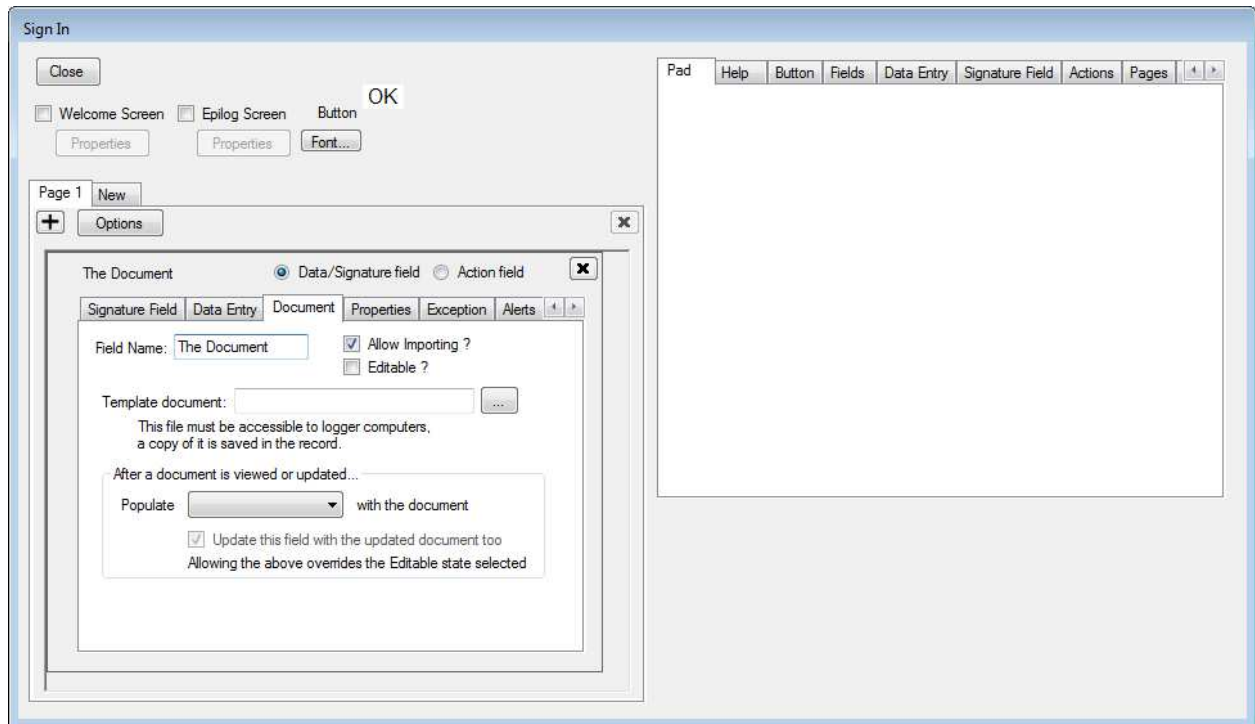



Figure 2 Creating a document field

In Figure 2, we note that the “Document” tab of the field definition panel has been chosen, and that we have typed a name in the “Field Name:” field, specifically “The Document” without the quotes.

So far, this is sufficient. The document field will be created, but will contain nothing at this point. In some cases, this might be the goal. For example, any document field can be a *target* field, which means that when a document in *another* field is edited, those changes should be put in *this* field.

To populate the field with a copy of some document when a visitor signs in, select the  to the right of the “Template document:” field.

Please keep in mind that this document must be visible to the computer running Visio Logger. It can be on a network drive somewhere, as long as it is always available when Visio Logger is running. Note that this does not have to be the case when Visio Logger is running in Viewer mode (i.e., not collecting visitor data).

Finally, choose whether to “Allow Importing ?” – which places a link in the data cell to allow replacement of the document with a different one, and whether to make the document “Editable ?”. The latter option allows anyone running Visio Logger to replace the document by launching its associated application.

Note that the document cell contains a link that allows anyone to at least *view* the document. But the aforementioned setting must be on to allow any changes to it to be put back in the cell.

Finally, if multiple document fields are defined, the “Populate” drop down box will contain all of the *other* such fields. If you choose a field from this drop down, then, *when* a user does edit the document, their changes are created as a new document in the selected document field. This *will* overwrite anything already in that field for this row of visitor data.

If you haven’t created such a “target” field, you can create it now, and when you come back to the list shown in Figure 2, that field will be there for selection.

One final note is that when you *do* allow migration to another field, you can *also* put those changes back into the source field. If that option is on, that copy is saved back to the source whether or not the Editable selection is on.

Editing Documents

As mentioned before, each document cell in the visible data rows (If the particular row you are looking for is not visible, choose Edit → Preferences in the main menu to change the displayed rows date), will contain a link. Clicking this link extracts the document from the database, saves it to a temporary file, and launches the document’s native application.

While that application is running, Visio Logger will wait for it to complete. Therefore, Visio Logger may appear to be hung during this time, but it is simply waiting until that document is closed.

The system relies on the native application being registered to handle the type of file indicated by the extension of the *template* file specified in the field definition. Therefore, if there is no such application registered, Visio Logger will display a message to that effect.

Saving Edited Documents

If the settings in the document field definition allow the content to be put back in the database, Visio Logger will put the *temporary* file that it created before launching the application *back* in the database, but only *after* the native application has exited.

Therefore, it is important not to do a *Save As* from the application, or at least to be aware that Visio Logger would have no way to be alerted that the file was a different one than the one it created.

Pre-populating a Word Document with Visitor Data

This is a unique feature of Visio Logger and is implemented through one of the integration tools shipped with the system.

Note: Microsoft Word must be installed on the computer running Visio Logger to use this tool.

Preparing your Word Template document

This exercise will involve creating *bookmarks* in your template document. The way the document tool works is to *locate* these bookmarks in a *copy* of the document that Visio Logger will pass to it, and *insert* the value of the data fields in those locations.

First, open your base (template) document in Word, locate those places in your document where you want each part of the visitor data to appear in the final document.

We've created the DuzAll Manufacturing document, and in it, we want to provide the First Name and Last Name of the visitor.

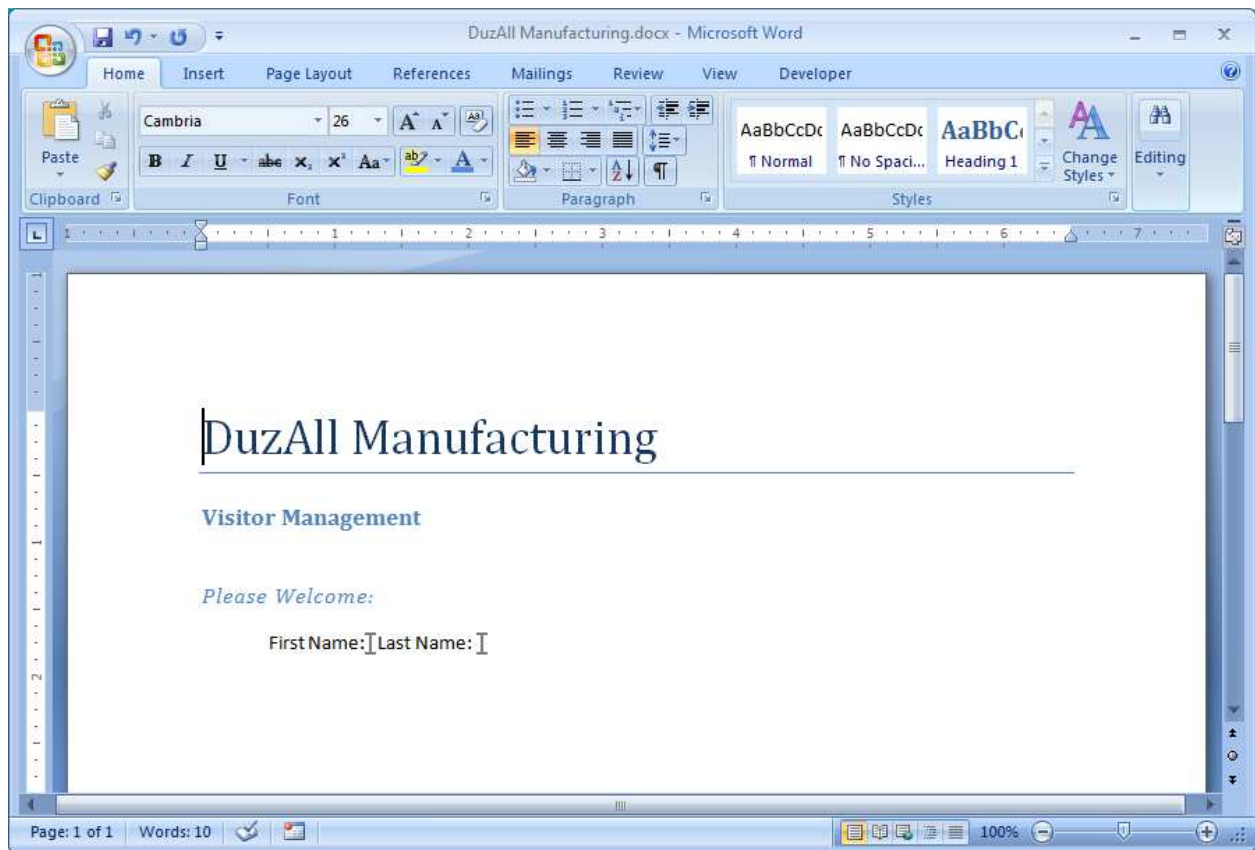


Figure 3 A simple template document

If you look closely at Figure 5, you will see two marks after each of "First Name:" and "Last Name:". These marks are how MS Word displays bookmarks in your document.

To create these bookmarks, we put the cursor at the desired location, and then choose Bookmark from the Insert ribbon of Word, which shows the dialog in Figure 5.

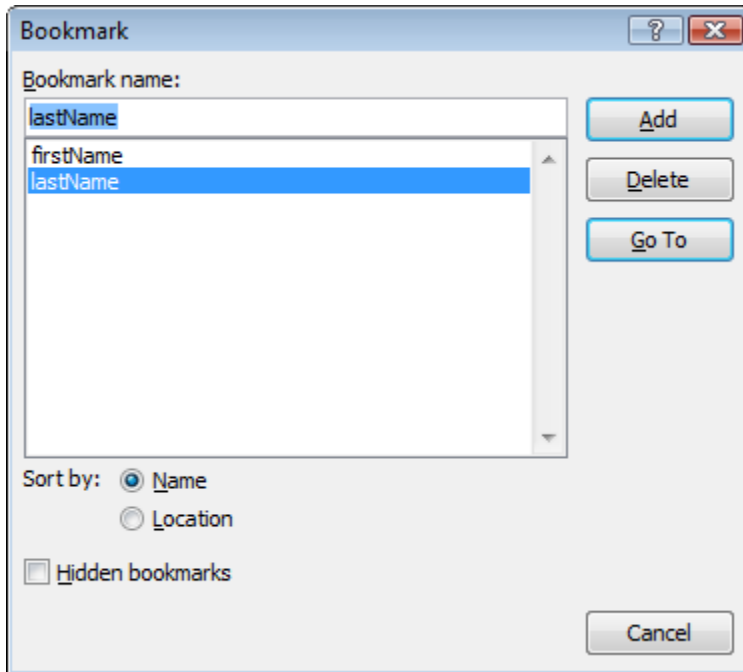


Figure 4 Adding bookmarks

We simply typed in the bookmark name, and clicked Add. Do not forget to click Add before Cancel, otherwise, Word will not save the bookmark. We have done this for both of our desired fields.

Note: do not forget to put at least one space *after* any bookmark, or the value will run into the subsequent text. Even if the bookmark is at the end of a line. If there is no space here, the Document tool will delete the return character, and the next sentence will roll up.

The template document is now ready for use by the tool. You should be sure and save it in the location where the specific document field is setup to retrieve it from a visitor data collection time.

Setting up the source data fields

We need the source text fields for our insertion values into the document.

To create these, refer to the procedure outlined in creating the Document field, except this time, visit the “Data Entry” tab shown in Figure 2.

Be sure and provide a name for the field, and if you have a signature pad, choose the option to display a keyboard on the pad.

We have done the above to create both a First Name and a Last Name field.

Setting the properties of the document tool

If, again, running as administrator, you choose Tools → Toolbox from the main menu, you will see the installed integrated tools in six categories. Our tool is in the “After the record is complete...” category.

We have highlighted to the

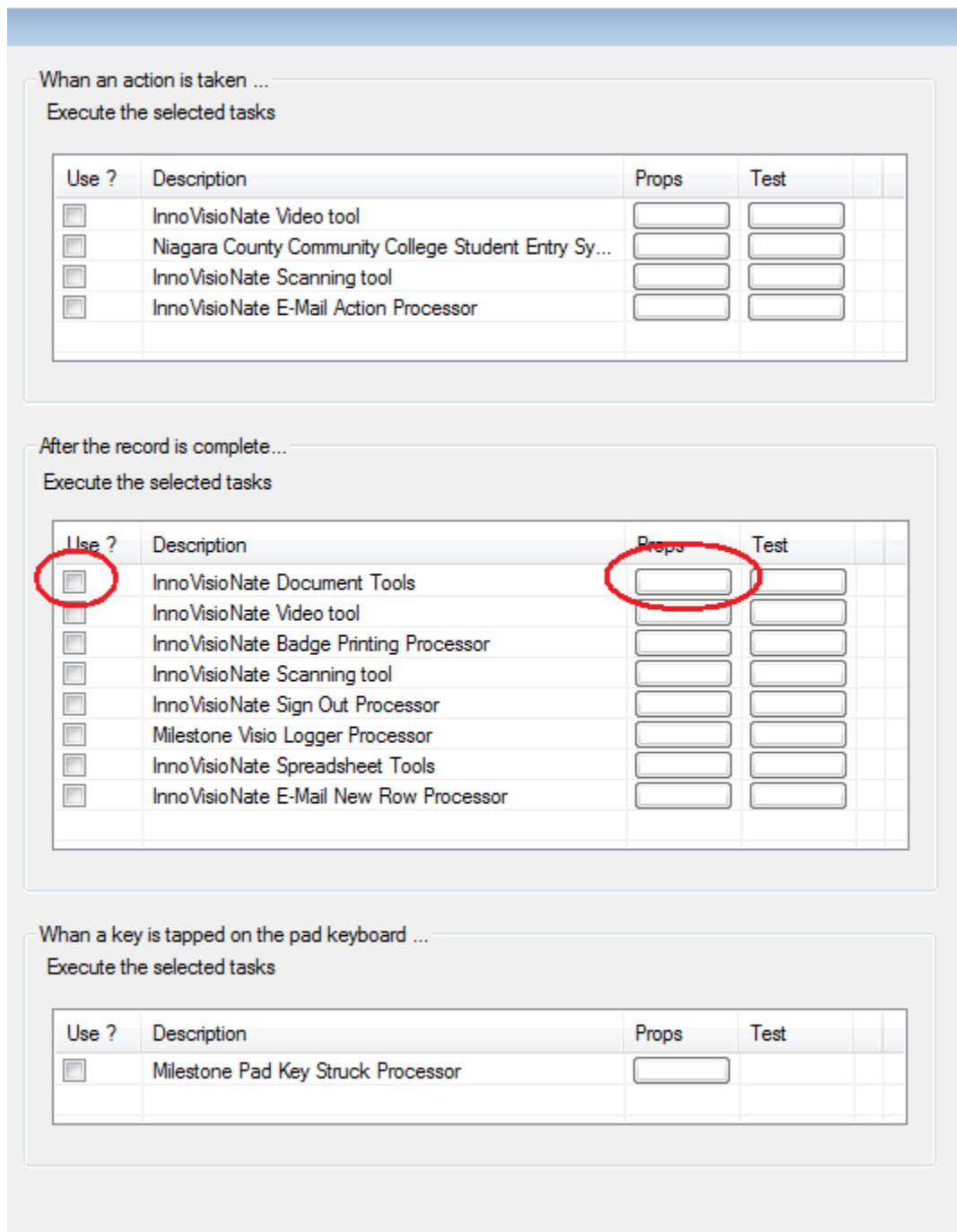


Figure 5 Toolbox showing the Document Tool

We have highlighted the relevant items in the toolbox. Note that we are only showing the right side of the toolbox to save space.

For the Document tool, click the button for it in the Props column. You will see the dialog shown in Figure 6.

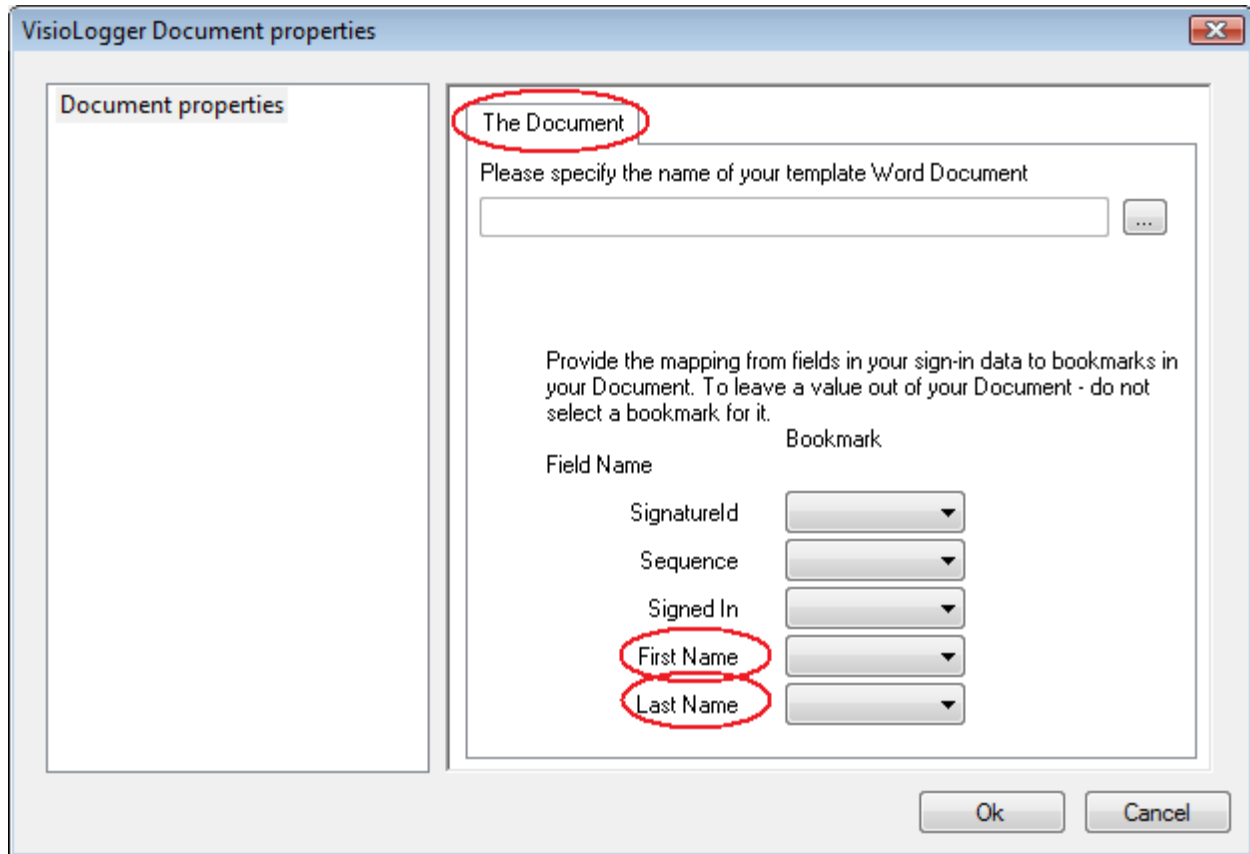


Figure 6 Initial properties of the document tool

Note in the above figure, we have circled the tab heading derived from our Document field(s), and the data entry field names that we defined.

If you have multiple document fields in your data, there would be multiple tabs as in Figure 6. Also note that the other three fields in the figure are always in every Visio Logger database. The SignatureId is the actual key value for the row of the data, if you were to store this someplace, one could find the visitor data by looking into the database with an external tool. Sequence is an integer that simply runs from 1 to the number of rows currently *displayed* in Visio Logger. It is important to remember that this number has no real connection to the data itself. Finally Signed In is the timestamp of when the visitor initially began the sign in process.

First, navigate to your template document by clicking the to the right of the document field, once you have done this, the drop down lists in the center will populate with the bookmark(s) found in that template.

For each value that you want inserted into your document, choose one of the bookmarks to the right of that value's field name. This creates the "mapping" between the fields and the bookmarks.

Now the tool is ready to be put to use. Be sure to check the CheckBox under the "Use ?" column for the tool in Figure 5.