

TracVisitors
User Documentation
www.MustangTechnologies.com
Version 1.2.4

Developed by
Mustang Technologies
PO Box 8006 – Green Bay, WI 54308

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TracVisitors

Overview

To expedite new releases of minor updates to TracVisitors, we have elected to keep the majority of the manual as is – and list all new changes in a separate section called “Updates”. Please refer to the “Updates” section for information about the latest version.

Now that security is a major concern at most organizations, it is imperative for organizations to know who is visiting its facilities. TracVisitors is designed to quickly store and retrieve the data on visitors, quickly sign-in and sign-out visitors, and print badges for the visitors.

In the future, TracVisitors will be enhanced to record visitor information based on their driver’s license – by reading the barcode found on the back of most drivers’ license. The enhanced version will also be able to verify a driver’s license against a “pre-qualified” database of driver’s licenses. If you are interested in the enhanced version – let us know and we will notify you when it is available.

Features include:

- ? Maintains all information about a visitor.
- ? Tracks visitors to your facility.
- ? Tracks visitors/drivers driving onto your facility
- ? Tracks visitors/guests at a seminar or conference.
- ? Prints a visitor’s badge to a Dymo LabelWriter label printer. At this time, this is the only label printer that is certified with TracVisitors.
- ? Allows you to store a visitor’s picture along with the visit transaction – however, the “picture taking” software and hardware is supplied by you. Basically, you would need to take the picture using a camera then store it to your computer using a third-party software application. Once the picture is saved to the computer, you can attach the filename for the picture into the visit transaction.
- ? Supports multiple users using TracVisitors at the same time
- ? Supports multiple locations and entrances for companies with multiple locations and multiple entrances at a location
- ? List all visitors for the day or all visitors in the database.
- ? List visits by visitor’s name, visitor’s company, the person and department that the visitor is visiting, the location of the visit, and the entrance used
- ? Apply filters by a variety of key fields which will list a subset of all the visits in your database.
- ? Quick sign-in and sign-out buttons to expedite check-in/check out times.

TracVisitors Requirements

TracVisitors is a multi-user .NET Windows application. To install TracVisitors, you must have the Microsoft .NET Framework 1.1 (or higher) installed onto your computer. The .NET framework is available on our web site or you can download it from Microsoft's web site. If you try to install TracVisitors and your computer does not have the .NET framework, you will be prompted and asked if you want to download the .NET framework from Microsoft. You may want to download the framework from Microsoft's web site because they supply the latest version.

TracVisitors was tested on Windows 2000 and Windows XP. It may run under Windows NT and Windows 98.

To print badges, you also need a Dymo LabelWriter 400. Refer to the section called "Printer Setup" in this manual.

Getting Started

Below is a summary of steps to get started with TracVisitors. For details, please refer to the appropriate section of this document.

1. Decide where you want to install TracVisitors and where the database will be located. If multiple employees will be using TracVisitors, then the TracVisitors database must be located on a centralized server.

When you install TracVisitors, a default database called TracVisitors.MDB is stored in the same folder as TracVisitors.EXE. An empty database is also installed in the same folder called Empty.MDB. We strongly suggest that you make multiple copies of the empty database. At the point of installation, both TracVisitors.MDB and Empty.MDB are empty databases.

2. After you install TracVisitors on the first user's computer, copy the database to the proper location (and remember the location). **Contact your computer people (or IT staff) to ensure that the TracVisitors database is placed in a location that is backed up on a regular basis – WE STRONGLY RECOMMEND THAT THE TracVisitors DATABASE IS BACKED UP TO A BACKUP MEDIUM (such as CD or Tape) ON A DAILY BASIS. IF YOU LOSE YOUR DATA, IT CANNOT BE RECOVERED. MUSTANG TECHNOLOGIES WILL NOT BE RESPONSIBLE FOR LOST DATA.**
3. Install TracVisitors onto all other users' computers. Do not copy the database again.
4. On each computer running TracVisitors, run TracVisitors using the user "admin" and password "admin". Select the "Configuration" submenu under "Maintenance" and browse to the common TracVisitors database location. The default folder is "C:\Program Files\ TracVisitors" – which is the default installation folder. If you installed TracVisitors into another folder (other than the default folder, you will get an error message indicating the database is corrupt or missing. Then you will have the option to switch to another database).
5. After all workstations running TracVisitors are pointing to the same database, log in as admin – and change your password for the admin account (perhaps change the user name too).
6. Change the company name under Maintenance/Company Information from "Mustang Technologies" to your company name (and address). Non-registered users will not be able to change the company name. After you purchase TracVisitors, a Registration Key is emailed to you. Your company name is embedded into the company name. See the "Register" section for more information.
7. Add all the other TracVisitors users with a unique password and the proper role/security. TracVisitors users are individuals that will be running (or accessing) TracVisitors. We suggest that you setup a couple general users with level 1 or level 2 securities. Level 1 security allows users to run reports. Level 2 and level 3 securities allow the users to add visits.
8. Enter your reference data. Reference data includes: locations, entrances, vendors, and departments. Reference data can be added from the visit screen.
9. Start adding visits into TracVisitors.
10. To register your version of TracVisitors, visit our web site at www.MustangTechnologies.com and select "Orders" for instructions.

Backing up your Database

It is the end user's responsibility to backup their TracVisitors database on a regular basis (preferably on a daily basis). If the database is damaged or if the server is damaged, your data will be lost and cannot be recovered – and your last good database will be your last backup. Since the database can be located at any location and the name of the database is flexible as well, we cannot tell you what database (or location) to backup. Please speak to your computer people (or IT department) on this matter – it is vital that you backup your database. Mustang Technologies is not responsible for lost data and damaged databases.

ALSO NOTE – The actual photo/picture images are NOT stored in the TracVisitors database. Only a reference to the photo/picture image is stored in the database. **YOU MUST BACKUP THE folder/subfolder with the photos/pictures.** We recommend that you store all your photo/picture files under a subfolder called **“Pictures”** under the folder that has the TracVisitors database. Then have your IT department backup the folder with the TracVisitors database **AND** all its subfolders.

Printer Setup

TracVisitors was designed to use the “Dymo LabelWriter 400” label printer. Other label printers may work with TracVisitors but the end user/customer is responsible for testing TracVisitors with other label printers.

1. First, install the printer drivers that came with your Dymo LabelWriter 400 printer. These drivers are normally included on a CD from Dymo. Drivers are also available on Dymo's website at www.Dymo.com
2. After installing, the drivers – decide if you will be using the
“30252 Address” labels (smaller labels) or
“30857 Badge Label” labels (larger labels)
3. From Windows – select “Start”, then “Settings”, then “Printers” (note – different Windows operating systems may have slightly different names for “Settings” and “Printers”).
4. Right click on the “Dymo LabelWriter 400” printer icon – then select the “Properties” menu item. The printer properties window/screen will be displayed – see figure 0.1.
5. From the properties window, click on the “Printing Preferences” button.
6. Then, click on the “Advanced” button.
7. Under the “Paper/output” branch – select the paper size – see figure 0.2. The paper size would be either the 30252 or the 30857 label. Other labels may work – but it is up to the end user/customer to test it.
8. After selecting the paper size, click the “OK” button. Then click the “Apply” button and “OK” button on the “Printing Preferences” windows/screen – then click the “OK” button on the properties window/screen.

There is no need to set the “Dymo LabelWriter 400” to the default printer.

Note: The above instructions may be a little different based on the Windows operating system you are using.

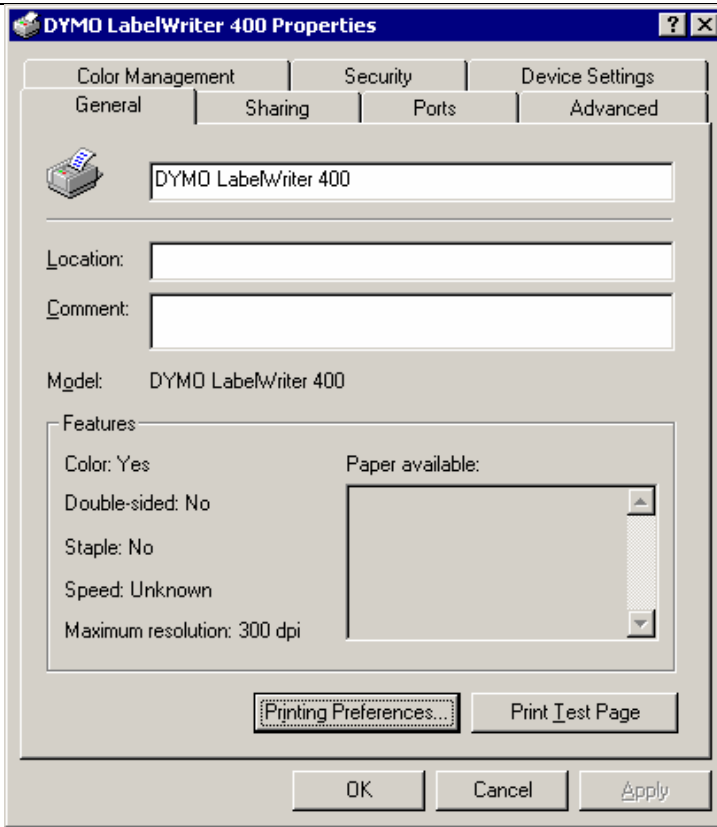


Figure 0.1

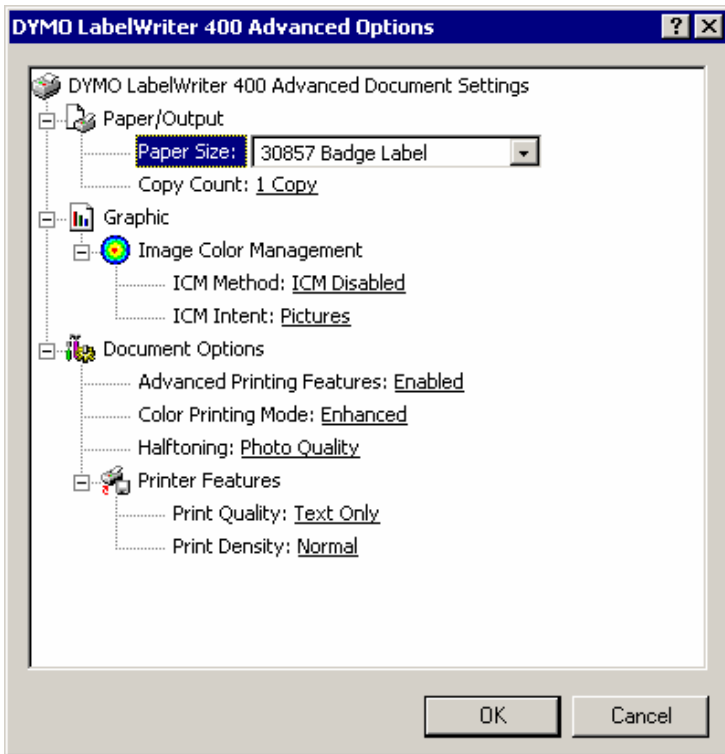


Figure 0.2

Using TracVisitors

Logon

To access TracVisitors, you must logon. Each user is assigned one of four security levels. Level 4 is the highest which provides complete access to all areas of TracVisitors. For first time users, the following users exist in the TracVisitors database:

User Name	Password	Security Level
admin	admin	4
level1	level1	1
level2	level2	2
level3	level3	3

After the user logs onto TracVisitors using a “User Name” with a security level of 4, the user will be able to add additional users and modify existing users. First time users are free to use and evaluate TracVisitors for 30 days. To use TracVisitors beyond the first 30 days, a “Registration Key” must be entered using the “Register” option on the Logon screen (see figure 1). A “Registration Key” is given to users that buy a legal copy of TracVisitors from “Mustang Technologies”. For instructions on registering your version of TracVisitors, please refer to the “Registering TracVisitors” section of this manual.

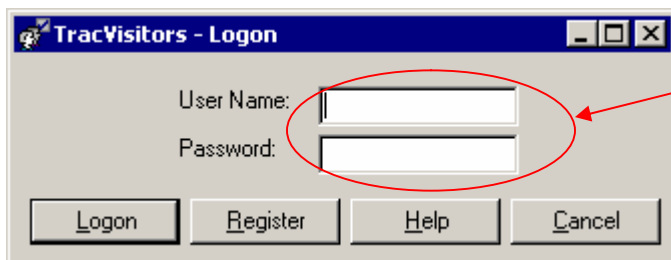


Figure 1

Logon
To logon to TracVisitors, enter a “User Name” and “Password” and click the “Logon” button. Please note that passwords are case-sensitive.

Note: During the 30-day free trial period, the following screen is displayed (see figure 1.1). This example indicates that there are 7 days left for using TracVisitors during the trial period.

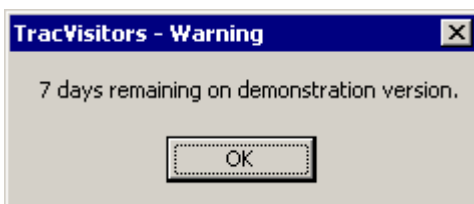


Figure 1.1

Note: After the 30-day free trial period, the “Logon” button is disabled (see figure 2) and the user MUST register TracVisitors to continue using it. To register TracVisitors, Mustang Technologies will provide a Registration Key via an email after TracVisitors is purchased from Mustang Technologies. When you receive the Registration Key – click on the “Register” button on the Logon screen – then enter the Registration Key and click the “Register” button. And then exit TracVisitors – and then restart TracVisitors.

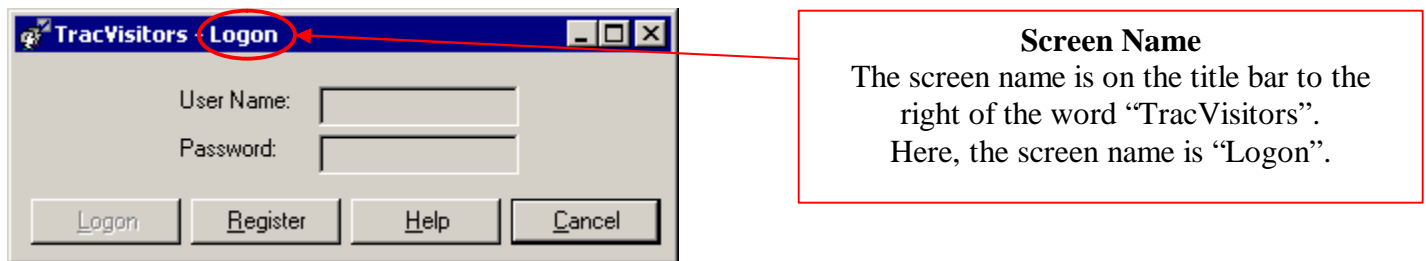


Figure 2

After logging onto TracVisitors, the main screen is displayed (see figure 3).

After restarting TracVisitors, you may notice processing delays or “screen refresh” delays when exiting (or entering) certain sections. For example, the first time (after a login instance) that you return from the “Visit” screen back to the “Visitors List” screen – you may experience a delay before the screen is refreshed. The reason for these delays is because .NET (.NET is the new Microsoft framework) will not load certain components into memory until they are needed – and the loading process may take a few seconds. However, after the first return from the “Visit” screen to the “Visitors List” screen – you should not see the delay again when you return from the “Visit” screen. You will experience these delays every time you restart TracVisitors – so we recommend that you start TracVisitors at the beginning of the day and keep it running throughout the day to reduce processing delays.

Note: The screen name is listed on the title bar to the right of the word “TracVisitors” (see Figure 2).

Product Registration

To register your version of TracVisitors, first click the “Register” button on the Logon screen (see figure 2). After clicking the “Register” button, the “Product Registration” screen will be displayed (see figure 2.1).

The “Registration Key” will be emailed to you by Mustang Technologies after you purchase the software online. After entering the Registration Key, click the “Register” button. Then the Logon screen is re-displayed. On the Logon screen, click the “Cancel” button to exit TracVisitors. Then restart TracVisitors.

NOTE: After you register the software, you MUST exit TracVisitors to complete the product registration process.

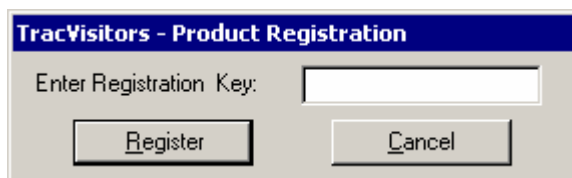


Figure 2.1

Security/Roles

Each user is assigned a security level (or role number) ranging from one (1) to four (4) – four (4) being the highest and providing rights to all areas of TracVisitors.

Below are the major features of TracVisitors and the security level required to use the feature.

Features	Level 1	Level 2	Level 3	Level 4
Delete (visit and any reference data)				*
Configuration including changing the database location				*
Add TracVisitors users				*
Purge visitors by year				*
Add and modify visit information and reference data		*	*	*
Run reports	*	*	*	*

Main Screen

After logging into TracVisitors, the main screen is displayed (see figure 3).

For additional instructions for the Main Screen, please refer to the “Using the Main Screen” section.

If there are visits that satisfy the current filter, then the visits will be listed in descending order – last visit first (by default). Filters are discussed below. In figure 3, there are visits listed – indicating an empty database or no visits that satisfy the current filter. If you know you have data in your database, then perhaps you opened the wrong database (or perhaps TracVisitors was re-installed and TracVisitors is pointing to an empty database). NOTE: When you re-install TracVisitors, your databases are **NOT** overwritten. To switch to another database, select the “Configuration” submenu option under “Maintenance” main menu option.

From this main menu, you can add a visit (sign someone in), sign out, view an existing visit, and delete a visit (if you have the rights to delete). From the main menu, you can also print reports.

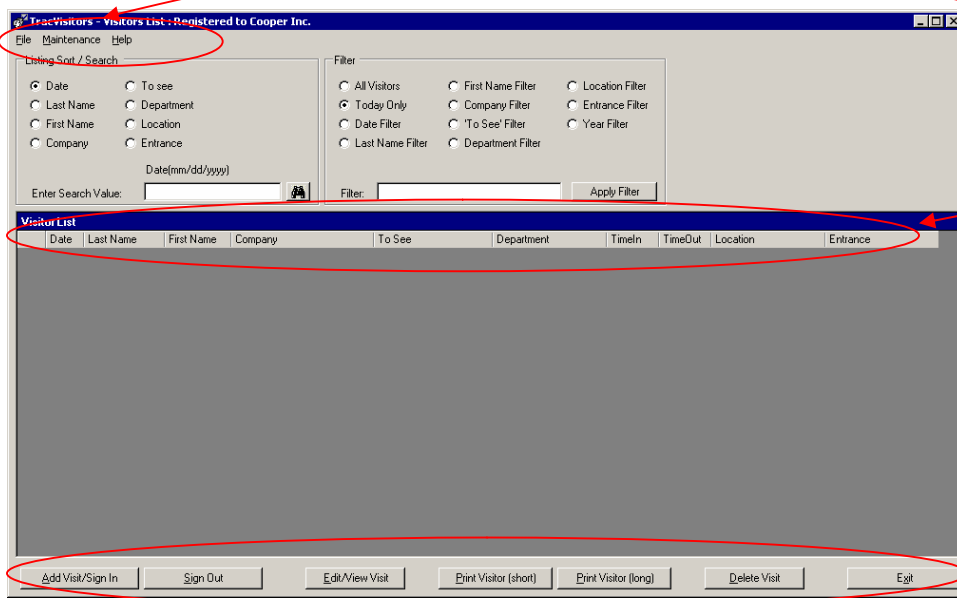


Figure 3

Main Menu Options
Click on File, Maintenance, or Help to view submenu options.

Column Headers in the Visitors List Grid
To sort the list for a particular column, click on the column header. Initially, a column is sorted in ascending order. To change the order, click on the column again and the visits will be sorted in descending order.

Main Commands
To add, sign-out, edit/view, or delete a visit - use one of these commands/buttons.

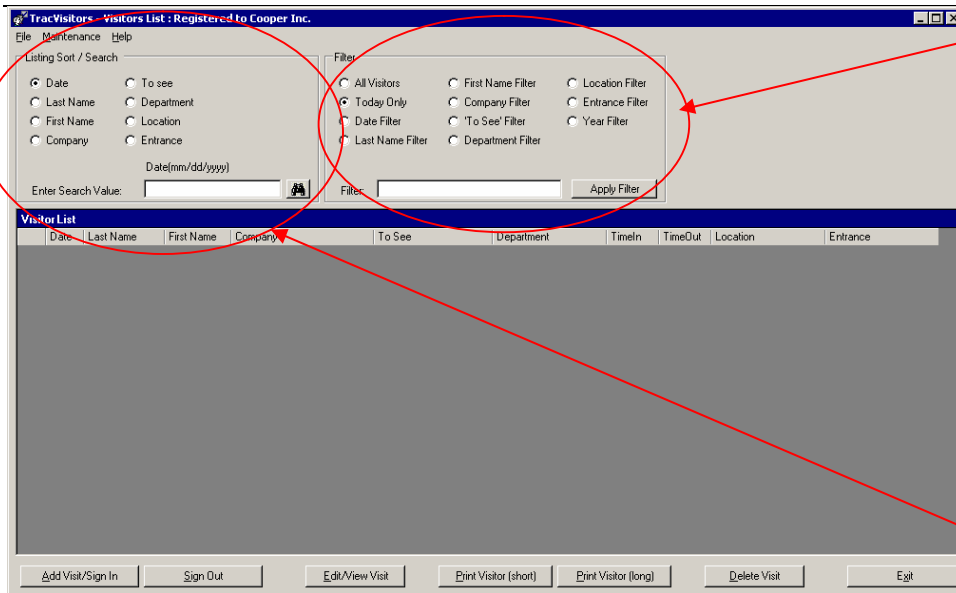


Figure 4

Filter
Normally, only the visits for the current day are listed on the “Visitors List” grid. However, with the filter feature, you can list certain groups of visitors. For example, you can list visitors with a certain last name or visitors to a certain department.

Listing Sort/Search
To change the sort or to search for a visit by a particular value, select the search column, enter a value, and click on the find button.

Company Information

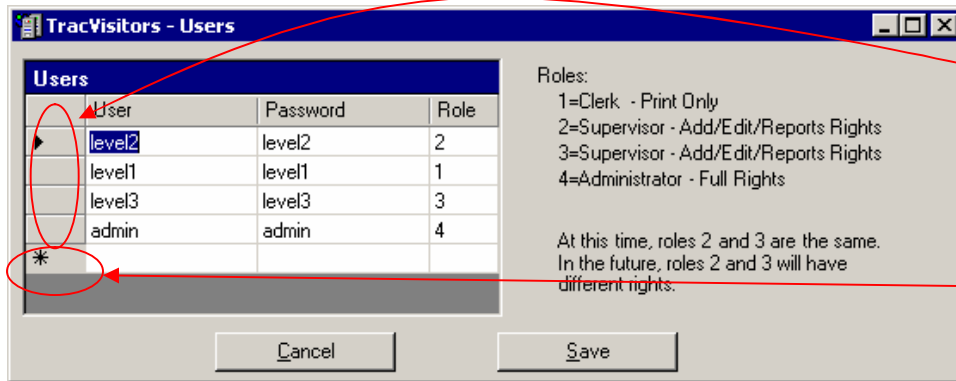
To modify the company information area, select the “Company Information” submenu under “Maintenance”. See figure 5.

Figure 5

Enter your company information then click the “Save” button. If you click the “Cancel” instead of the “Save” button, no changes will be saved.

Maintaining Users

To add, modify, and delete users, the user that is currently logged in must have a security level of 4. To maintain users, select the “Users” submenu under “Maintenance” – see figure 6.



Row Selector

To select a row, click on the row selector column for the row you wish to select.

Add Row Indicator

To add another user, enter the user name, password, and role number into this row – then click the “Save” button.

Figure 6

To delete a user, select the row by clicking on the “Row Selector” column and then press the “Delete” key on your keyboard.

To add a user, type the new user name, password, and role number on the row with the “*” (called the “add row indicator”).

To change a value for an existing user, click on the value and start typing.

To save your changes, you must click the “Save” button. If you click the “Cancel” button instead of the “Save”, no changes will be saved.

To save, at least one user must have a role of 4.

To sort/list the users by a different column, click on the column title.

NOTE: Passwords are case-sensitive.

Workstation Configuration

To change the location of the database for a particular user (on a particular computer), change the default location of the workstation, change the default entrance of the workstation, change the badge printer, or to change the information printed on the badge - select the “Workstation Configuration” submenu under “Maintenance” – see figure 8.

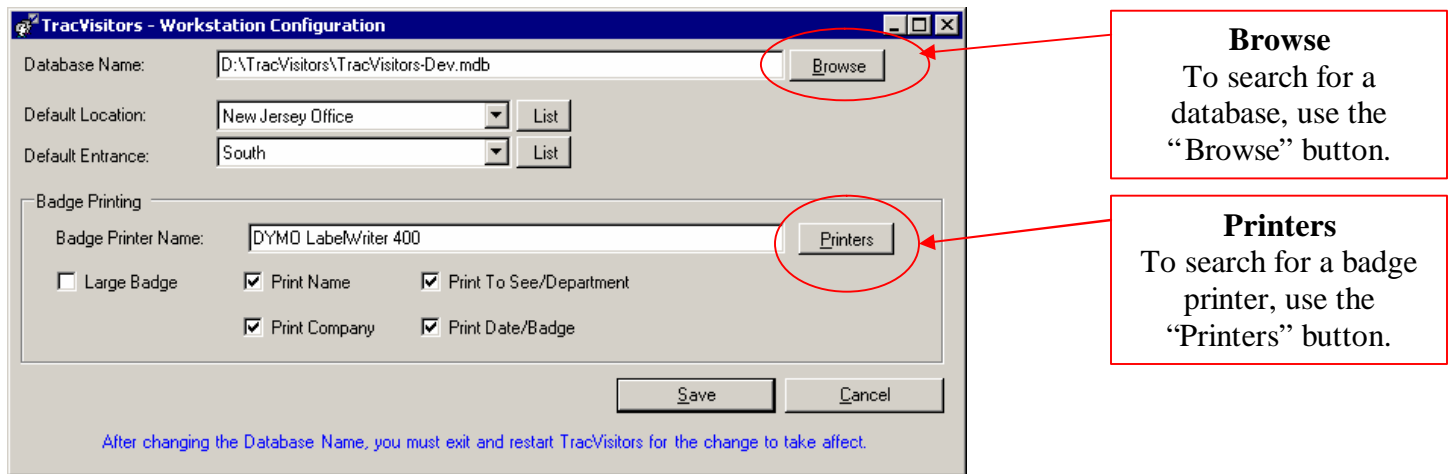


Figure 8

If you are running TracVisitors on multiple computers, you should place the database (the default database name is TracVisitors.MDB) in a common location (usually a folder on a file server) and then you must select/set the database name at each workstation/computer. To select/set the database name at each workstation/computer, use the “Browse” button.

Input Fields

Database Name – Use the “Browse” button to search your computer network for the TracVisitors database.

Default Location – One input field on the Visit screen is the Location. The location is the location of the facility. If you have multiple facilities, all facilities could use the same database over the company’s network. Instead of selecting the location for each visit at a particular workstation/computer, you can set a default location for this workstation/computer. To select the default location for the current workstation, click the “List” button next to the combo box or click on the DOWNARROW on the combo box. **NOTE:** To add new locations, click the “List” button then click the “Add” button.

Default Entrance – One input field on the Visit screen is the Entrance. The entrance is a particular entrance at a facility. If you have multiple facilities and/or multiple entrances, all entrances could use the same database over the company’s network. Instead of electing the entrance for each visit at a particular workstation/computer, you can set a default entrance for this workstation/computer. To select the default entrance for the current workstation, click the “List” button next to the combo box or click on the DOWNARROW on the combo box. **NOTE:** To add new entrances, click the “List” button then click the “Add” button.

Badge Printer Name– **CURRENTLY, TracVisitors has tested and supports only one badge printer – the Dymo LabelWriter 400.** When you install the printer drivers for the Dymo LabelWriter, you could change the name. Here, select the “Dymo LabelWriter 400” printer from your printer list.

To list the printers on your workstation/computer, click the “Printers” button. Each Windows operating system has a different “Print” dialog window. On most operating systems, you can list

the different printers on your workstation by clicking the DOWNARROW on your combo box on your “Print” dialog window. After selecting the printer on your “Print” dialog window, click the “OK” button.

“*Large Badge*” *Checkbox*– The Dymo LabelWriter printer supports different labels. TracVisitors supports both the “White Address Labels” and the “Badge Labels”. If you are using the smaller address labels, uncheck this checkbox. If you are using the larger badge labels, check this box. Extra spacing is used when the “Large Badge Labels” are used.

“*Print Name*” *Checkbox*– Check this box if you want the visitor’s name printed on the label/badge.

“*Print Company*” *Checkbox*– Check this box if you want the visitor’s company name printed on the label/badge.

“*Print “To See”/Department*” *Checkbox*– Check this box if you want the person’s name and department, that the visitor is visiting, to print on the label/badge.

“*Print Date/Badge*” *Checkbox*– Check this box if you want the sign-in date and the badge number printed on the label/badge.

It is not possible to print all four pieces of information on an address label because the label is too small. TracVisitors can print all four pieces of information on the larger badge label.

TracVisitors prints the information on the label/badge in the following sequence:

- 1) visitor’s name,
- 2) visitor’s company name,
- 3) the name of the person and their department being visited (referred to as the “to see” person, and
- 4) the date of the visit and the badge number.

At this time, there is no method for changing the sequence of the badge printing in TracVisitors.

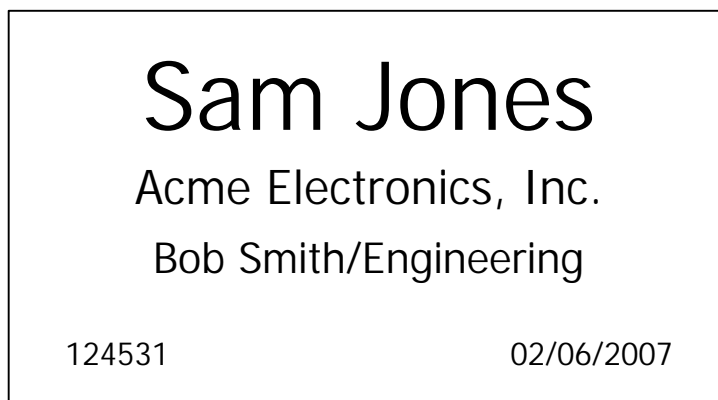


Figure 8.1 – Example of badge on large label

Note: The font size adjusts, if the information is too long, to accommodate longer names.

After entering all the information on the screen, click the “Save” button.

After the database name is saved, you must exit TracVisitors and restart TracVisitors before TracVisitors will start using the new database name.

Backing up your Database

It is the end user's responsibility to backup their TracVisitors database on a regular basis (preferably on a daily basis). If the database is damaged or if the server is damaged, your data will be lost and cannot be recovered – and your last good database will be your last backup. Since the database can be located at any location and the name of the database is flexible as well, we cannot tell you what database (or location) to backup. Please speak to your computer people on this matter – it is vital that you backup your database. Mustang Technologies is not responsible for lost data and damaged databases.

Using Visitor Photos/Pictures

TracVisitors can reference photos (files of pictures) stored on your computer system – however, TracVisitors does not include a picture-taking/imaging component (or module). If your facility will be using photos, then we recommend that you store all photos to a subfolder called “Pictures” under the folder that has the TracVisitors database. By default, TracVisitors is installed in the following folders:

C:\Program Files\TracVisitors *(default folder for EXE, configuration files, and database)*
 C:\Program Files\TracVisitors\Pictures *(default subfolder for photos)*

So – if you move your database to a file server under a folder called “TV”, then you would have the following folders for database and photos.

F:\TV *(folder for database)*
 C:\TV \Pictures *(subfolder for photos)*

Set up your camera system to store all pictures to the “Pictures” subfolder. By default, TracVisitors will list photos in the “Pictures” subfolder when the user clicks the “Browse” button next to the “Picture Filename” input field on both the Visit screen and the Vendor/Customer/Visit screen

NOTE: TracVisitors must be installed onto each workstation – meaning the TracVisitors.EXE file and associated configuration files MUST be installed onto each workstation. The database and the photos can be stored on a centralized server so that multiple users can use the same database. Refer to “Workstation Configuration” for further information about configuring TracVisitors to access a common database.

NOTE: Backup - TracVisitors can reference photo files anywhere on your computer system/network. However, when you backup the TracVisitors database – the photo files DO NOT get backed up automatically. YOU MUST BACKUP the folder with the photos/pictures. A good practice is to store all photo/picture files under the “Pictures” subfolder – THEN have your IT group set up an automatic backup routine to backup the TracVisitors database folder and all subfolders.

Reference Data

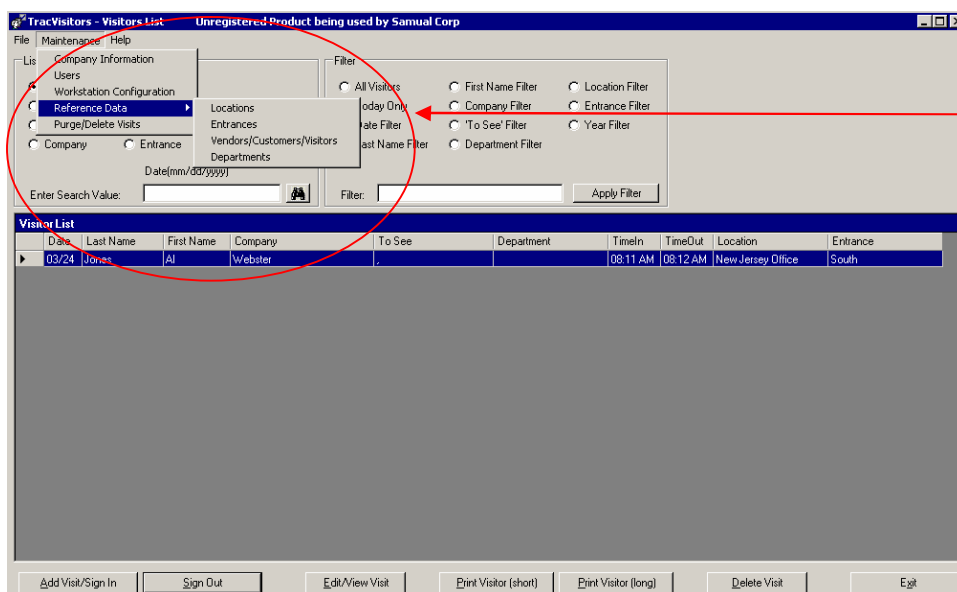
Reference Data is data (information) that is referenced from a visit. By using reference data, you improve data entry because you can select the reference data instead of entering the reference data. In addition, it is easy to extract all visits based on a particular reference. For example, if your facility is visited regularly by an individual or is visited regularly by several individuals from the same company, then you would add that company to the company table/list. By having the company in the company table/list, the receptionist or guard

can quickly lookup the company and pull the reference data into the new “visit transaction” without entering the company name and address. Another reason for using reference data is database integrity. If the receptionist/guard enters the company name different on each visit, it is difficult to run a report for the number of visits for a particular company – one receptionist/guard may enter a company name as “Acme Services, Inc.” and another receptionist/guard may enter it as “Acme”. To a computer, “Acme Services, Inc.” and “Acme” are two different companies.

The company table/list is referred to as reference data.

There are several categories of reference data. These categories are: Locations, Entrances, Vendors/Customers/Visitors, and Departments.

Using reference data is very important because it will allow you to view the visits in a variety of ways. To maintain reference data, select “Reference Data” submenu option under the “Maintenance” – see figure 9. In addition, you can add reference data while entering data on the Visit screen.



Reference Data
The menu options for entering reference data are found under the Maintenance main menu option.

Figure 9

Only TracVisitors users (the person that signed onto TracVisitors) with a security level of 4 can delete reference data (and visits/visit records). Also note: TracVisitors will not let a user delete reference data that is being used by a visit/visit record. For example, if a visit/visit record is using the reference entrance of “South Entrance” – then TracVisitors will not allow the user to delete entrance of “South Entrance”.

When you select a reference category (such as Locations or Departments), the first screen that will be displayed is a listing screen for that category (see figure 10 for a listing screen for Locations). From this listing screen, you can sort the list by the columns displayed in either ascending or descending order. To initiate the sort, click on the column header. Column headers for the locations are “Location ID” or Location Description”. If you click the same column a second time, the sort order is reversed. For example, if the “Location Description” is sorted in ascending order and you click the “Location Description” column again – the “Location Description” column will be resorted in descending order.

This concept of column sorting is used throughout TracVisitors.

NOTE: Ascending order is lowest value to highest value (A-Z). Descending order is highest value to lowest value (Z-A).

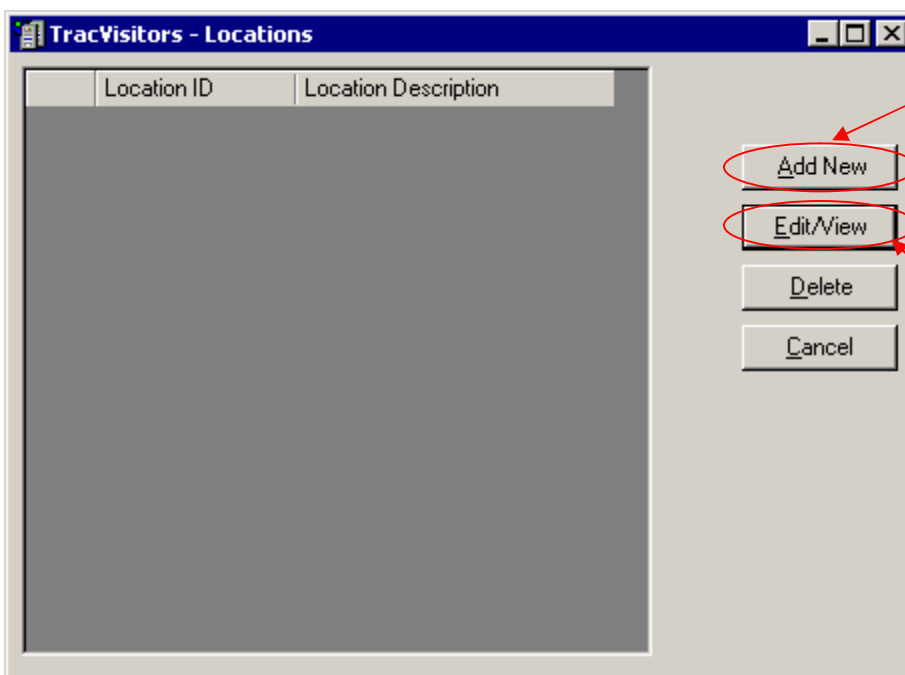
Maintaining Locations

It is very common for larger companies to have multiple locations. For example, a sales office at “123 Main Street” and a distribution center at “567 Elm Street”. Each workstation can default to a particular location allowing the receptionist/guard to quickly sign in visitors. The default location is selected on the “Workstation Configuration” screen.

To add or change a location, select “Locations” submenu under “Reference Data” – “Reference Data” is a submenu under the “Maintenance” main menu. After selecting “Locations”, the “Location List” screen is displayed – see figure 10.

The “Delete” button is only enabled if the TracVisitors user (the person that signed into TracVisitors) has a security level of 4. Also – TracVisitors will not allow you to delete a location when a visit is using the location.

The features and capabilities of each reference data category are very similar. Under the location area, we will provide a more in-depth review – but under the other reference categories, we will provide a brief review.



Location List
 To add a new location, click on the “Add New” button.

To edit an existing location, move to the location in the list and click the “Edit/View” button.

NOTE: The location list is empty in figure 10.

Figure 10

Initially, the locations are sorted in ascending “Location ID” order. To change the sort, click on the appropriate column. For example, to change the sort from “Location ID” to “Location Description”, click on the column title for “Location Description”

NOTE: Ascending order is lowest value to highest value (A-Z). Descending order is highest value to lowest value (Z-A).

To add a new location, click on the “Add New” button. After clicking on the “Add New” button, the “Location” screen is displayed – see figure 11.

Figure 11

Location

On a new location, the Location ID is set to “New”.

After entering or modifying the location information, click the “Save” button to save the changes to the TracVisitors database.

After clicking on the “Add New” button on the “Location List” screen (figure 10), an empty location screen is displayed waiting for the user to enter details about the location (see figure 11).

The most important input field on this screen is the “Description” input field. The “Description” is used on reports, for sorting on main screen (see figure 3), and for filtering on the main screen. Try to use unique letters (or numbers) as the first few characters of the “Description”. For example, if you have several locations on “Main Street”, we recommend that you use the street number as the first few characters of the description instead of the word “Main”. Why? If you want to list only the visitors to “235 Main St.” – you only need to enter a filter of “235”. But if all “Main Street location” descriptions start with Main, then you will need to enter a filter that will distinguish one location from another.

Good location names:

235 Main Street
 825 Main Street
 1090 Main Street
 Distribution - Main Street
 Manufacturing – Main Street
 Corporate Office – Main Street

Bad location names:

Main Street - Distribution
 Main Street – Manufacturing
 Main Street – Corporate Office

The “Location ID” is generated by TracVisitors. The link between the visit record and the location is accomplished through the “Location ID”. By using the “Location ID” as the link, the user can change any value for a location without affecting the link to the visit.

Input Fields

Description – Enter a unique description for the location. You can change this description at any time without affecting the links between visits and locations.

Address 1 – Enter the location address.

Address 2 – Enter a second address for the location.

City – Enter the city for the location.

State/Providence– Enter the state for the location.

Zip Code – Enter the zip code for the location.

Contact – Enter a contact for this location.

Phone Number – Enter a phone number for this location.

Fax – Enter a fax number for this location.

Email Address – Enter an email address for the contact at this location.

Notes – You can enter notes about this location. The maximum size of the Notes input field is 1,000,000 characters.

No input fields are required – but it makes little sense to add a location without entering at least a location description.

After entering (or modifying) values for a location, click the “Save” button. After the saving process is complete, you are returned to the “Location List” screen (see figure 12). Note that the new location is shown in the list. To see the “Location List” screen with multiple locations, please refer to figure 13.

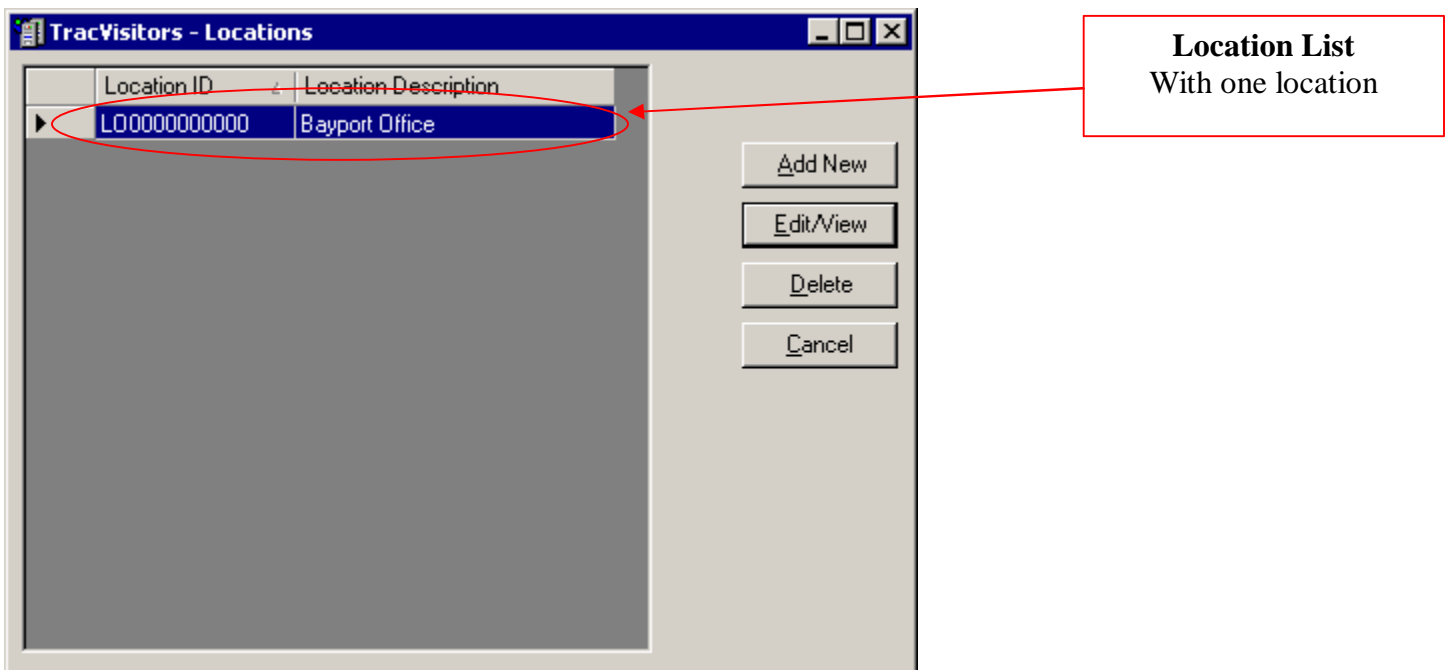
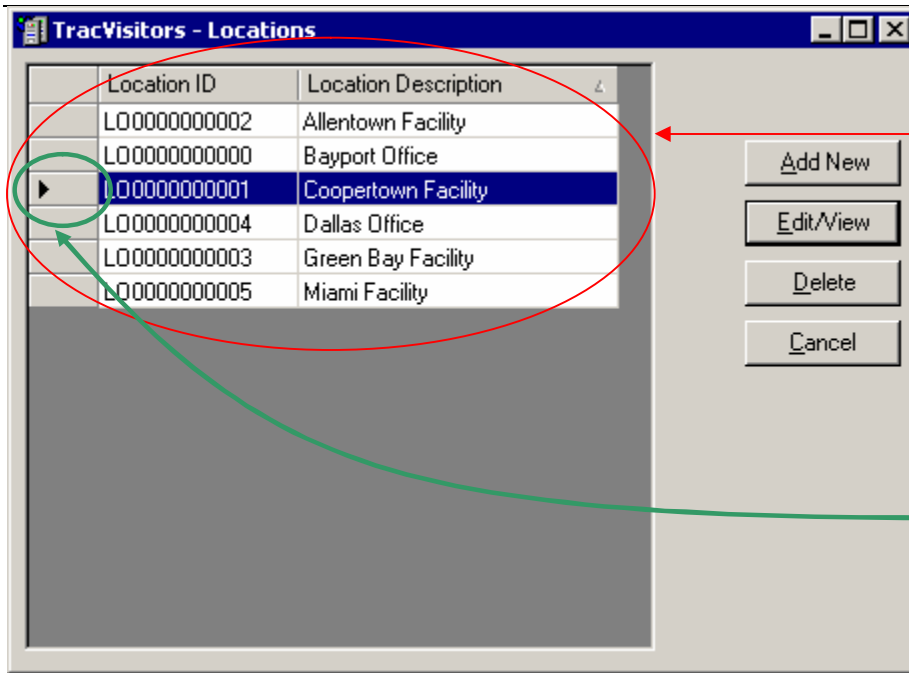


Figure 12

While on the “Location” screen (figure 11), if you make any changes to a location and click the “Cancel” button instead of the “Save” button – you will be prompted by TracVisitors asking you if you want to save the changes.

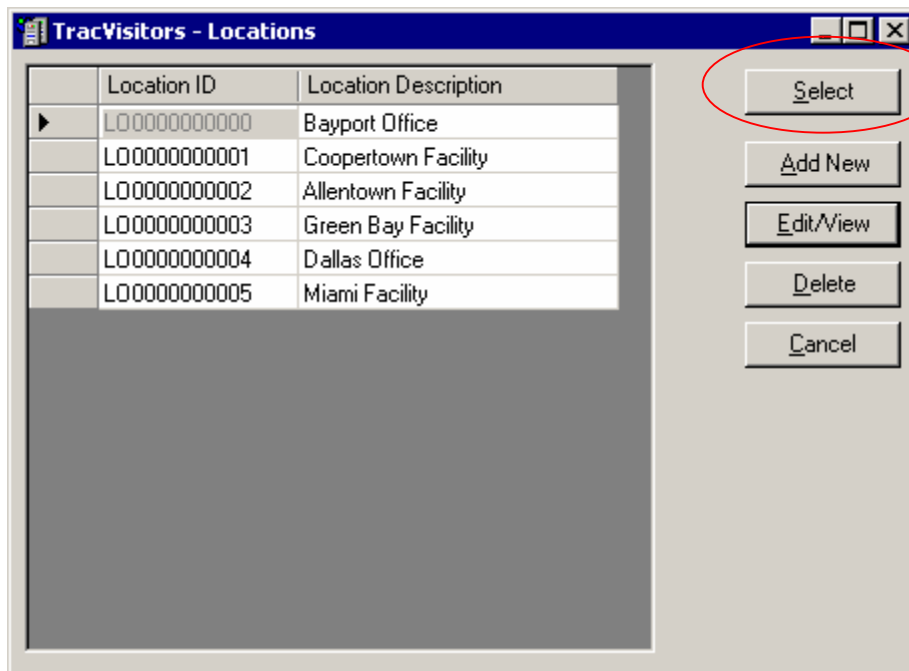


Location List
With multiple locations.
Currently, the locations are sorted by "Location Description" in descending order.

Current Pointer
The current pointer is pointing to the "Coopertown Facility" location. If we click the "Edit/View" button at this time, TracVisitors would show the details of the location. If we click the "Delete" instead, this location would be deleted.

Figure 13

In most cases, the list for reference data (such as the "Locations" list in figure 13) can be accessed from several areas. For example, the "Locations" list can be accessed from the main menu under "Reference Data", from the "Workstation Configuration" data input screen, and the "Visit" screen. If you are accessing the "Locations" list from the "Workstation Configuration" screen or from the "Visit" screen, a "Select" button will also appear on the "Locations" list screen. See figure 13.1.



Location List with Select Button
The "Select" button can be used to select the location that is being pointed to.

Figure 13.1

Maintaining Entrances

In some cases, very large buildings and complexes may have multiple entrances – and you may want to track where visitors enter the building or complex. For example, a large distribution center may have multiple entrances. Each workstation can default to a particular entrance allowing the receptionist/guard to quickly sign in visitors. The default entrance is selected on the “Workstation Configuration” screen.

To add or change an entrance, select “Entrances” submenu under “Reference Data” – “Reference Data” is a submenu under the “Maintenance” main menu. After selecting “Entrances”, the “Entrance List” screen is displayed – see figure 14.

The “Delete” button is only enabled if the TracVisitors user (the person that signed into TracVisitors) has a security level of 4. Also – TracVisitors will not allow you to delete an entrance when a visit is using the entrance.

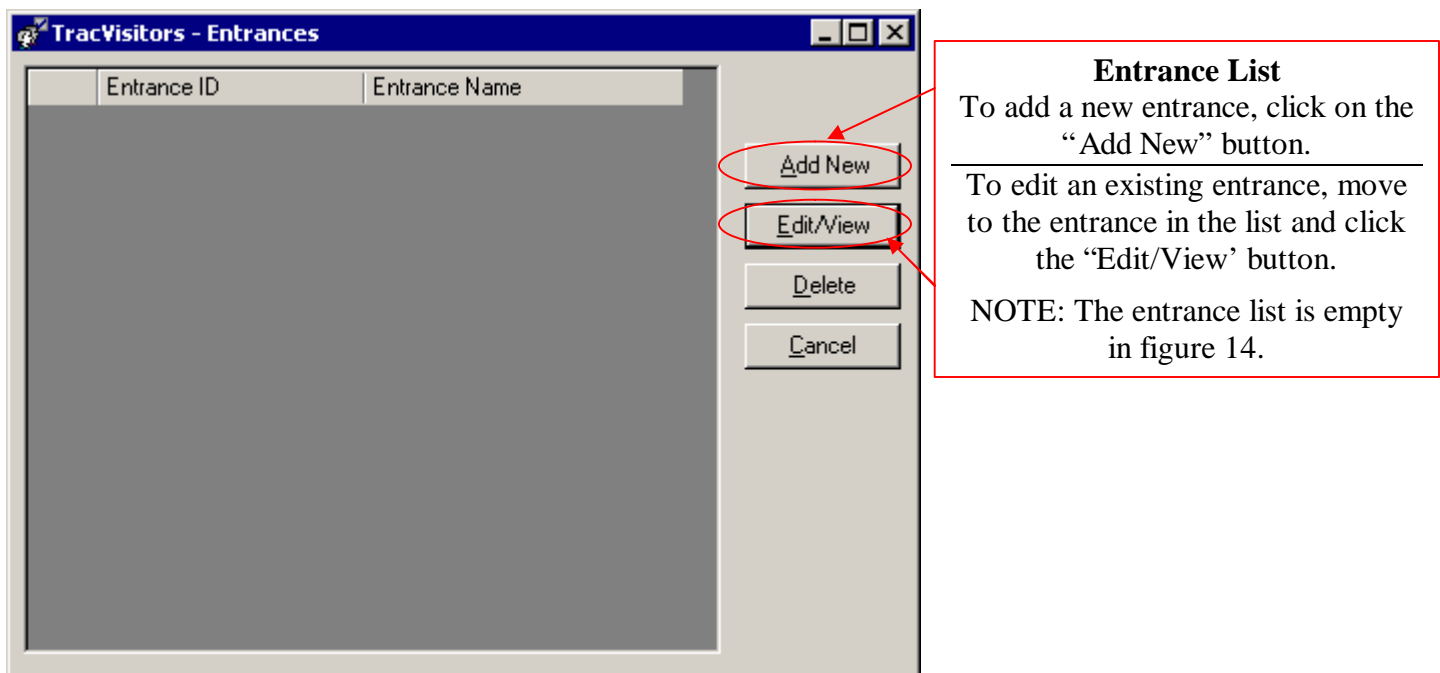


Figure 14

Initially, the entrances are sorted in ascending “Entrance ID” order. To change the sort, click on the appropriate column. For example, to change the sort from “Entrance ID” to “Entrance Description”, click on the column title for “Entrance Description”

To add a new entrance, click on the “Add New” button. After clicking on the “Add New” button, the “Entrance” screen is displayed – see figure 11.

Entrance

On a new location, the Entrance ID is set to “New”.

After entering or modifying the Entrance information, click the “Save” button to save the changes to the TracVisitors database.

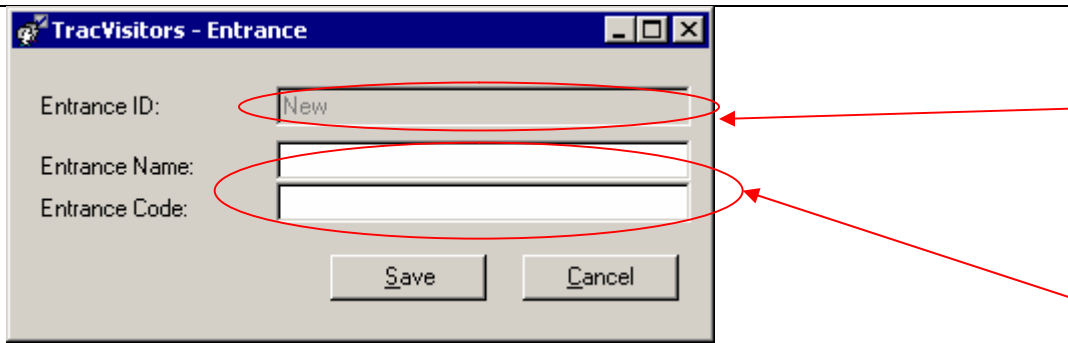


Figure 15

After clicking on the “Add New” button on the “Entrance List” screen (figure 14), an empty “Entrance” screen is displayed waiting for the user to enter details about the entrance (see figure 15).

The most important input field on this screen is the “Entrance Name” input field. The “Entrance Name” is used on reports, for sorting on main screen (see figure 3), and for filtering on the main screen. Try to use unique letters (or numbers) as the first few characters of the “Entrance Name”.

The “Entrance ID” is generated by TracVisitors. The link between the visit record and the entrance is accomplished through the “Entrance ID”. By using the “Entrance ID” as the link, the user can change any value for an entrance without affecting the link to the visit.

Input Fields

Entrance Name – Enter a unique description for the entrance – including a reference to the facility (if you have multiple facilities with similar entrance names such as South Entrance). You can change this name at any time without affecting the links between visits and entrances.

Entrance Code – Enter a code for the entrance.

No input fields are required – but it makes little sense to add an entrance without entering at least an entrance name.

After entering (or modifying) values for an entrance, click the “Save” button. After the saving process is complete, you are returned to the “Entrance List” screen (see figure 16). Note that the new entrance is shown in the list.

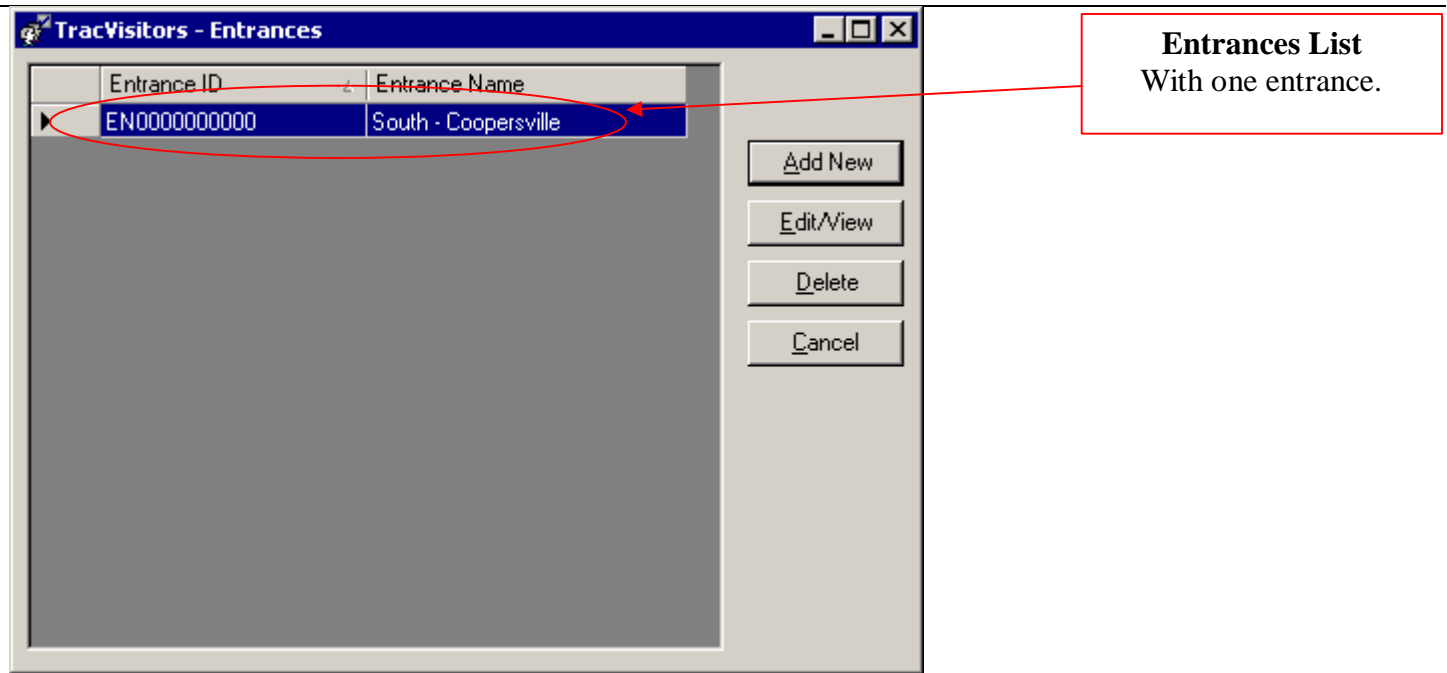


Figure 16

Maintaining Vendors/Customers/Visitors

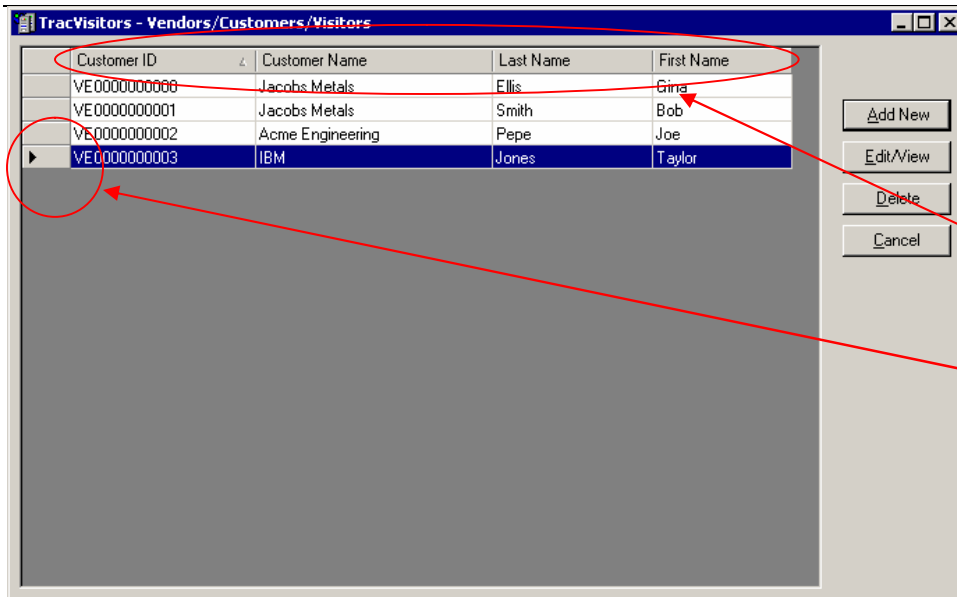
At some facilities, visitors come from common vendors and/or customers. Also – some facilities may be high-security areas that require visitors to be pre-registered (or listed) in your visitor database. Under the “Vendors/Customers/Visitors” maintenance area, you can enter pre-qualified/pre-registered vendors, customers, and/or visitors.

Another advantage of having vendors, customers, and/or visitors entered into TracVisitors is the receptionist/guard can expedite the sign-in and the verification process for visitors – because there is less data entry during the sign-in.

To add or change a vendor, customer, or a visitor’s information, select “Vendors/Customer/Visitors” submenu under “Reference Data” – “Reference Data” is a submenu under the “Maintenance” main menu. After selecting “Vendors/Customer/Visitors”, the “Vendors/Customer/Visitors List” screen is displayed – see figure 16.

To add a new vendor/customer/visitor, click on the “Add New” button. To modify or view an existing record, move the current pointer to the proper row then click the “Edit/View” button. Figure 16 is an example of the “Manufacturer/Service Provider” screen after clicking the “Edit/View” button.

When a user accesses the Vendors/Customers/Visitors list screen from the Visit screen (see figure 25), information from a particular vendor/customer/visitor can be loaded onto the Visit screen – saving the receptionist/guard from entering the information onto the Visit screen.



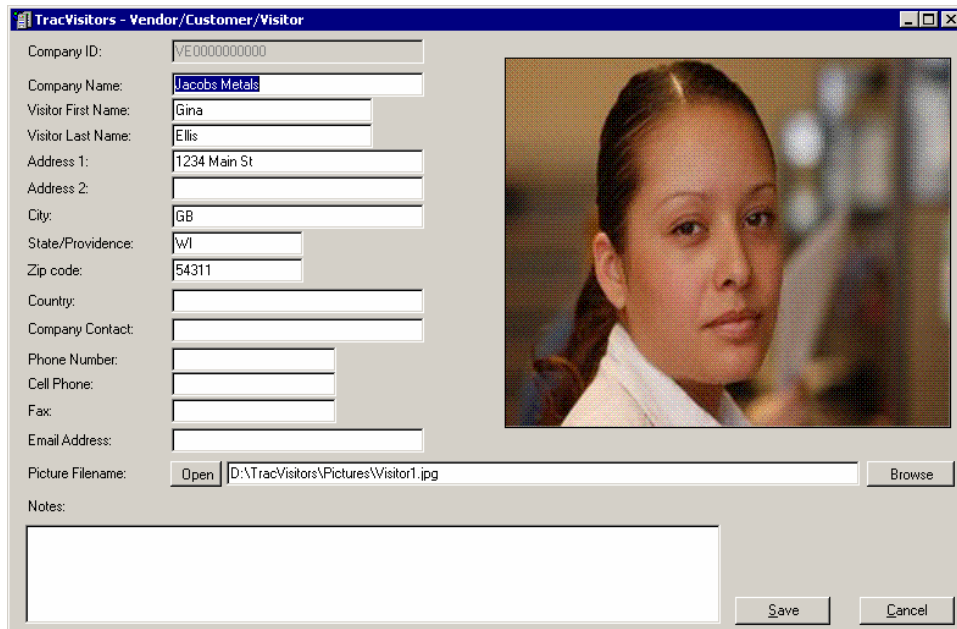
Vendors/Customers/Visitors
Here is the list of vendors, customers, and/or visitors.

Currently, the list is sorted in ascending order by Customary. To change the sort column, click on the title of the column.

Also – the current pointer is pointing to “IBM”.

Figure 16

To edit/modify an existing record, move the current pointer to a row and click the “Edit/View” button (see figure 17).



Vendors/Customers/Visitors
Here are the input fields for one vendor, customer, and or visitor.

In this example, we have a photo of the visitor – which could be used to compare it against the actual visitor.

Figure 17

The “Customer ID” is generated by TracVisitors. Besides the “Customer ID”, no other input fields are required.

Input Fields

Customer Name– Here we use the term “Customer Name” – but, it could be the vendor’s name too.

Actually, you should think of the customer name as the company name of the visitor. In some cases, the visitor may not be with a company.

Visitor First Name

Visitor Last Name – If an individual visits your facility frequently, you may want to add the individual to your “Vendor/Customer/Visitor” table – and enter the individual’s first and last name.

However, if your facility is visited by different employees of a company – then you may want to leave a blank for the Visitor First Name and Last Name – but fill in all the details for the company (such as company name, address, city, etc.).

NOTE: On the Visit screen (not covered yet), if you enter a first name and last name – then select a vendor/customer – the name you entered onto the Visit screen will NOT be overwritten.

Address 1 – Enter the address.

Address 2 – Enter the address.

City – Enter the city.

State/Providence – Enter the state.

Zip Code – Enter the zip code.

Company Contact – Enter a company contact. This is just a reference for the company – and it is not pulled into the Visit screen (not covered yet).

Phone Number – Enter a phone number.

Cell Phone – Enter a cell phone number.

Fax – Enter a fax number.

Email Address – Enter an email address.

Picture Filename – Select a filename of a photo of this visitor. To select a filename, click the “Browse” button to the right of the input field. By default, TracVisitors will list image files in the “Pictures” subfolder of where the TracVisitors database is located. However, you can select files from any subfolder on your computer system.

Notes – You can enter notes. The maximum size of the Notes input field is 1,000,000 characters.

No input fields are required – but it makes little sense to add a vendor, customer, or a visitor without entering a company name or a person’s name.

After entering (or modifying) values for a vendor, customer, or visitor, click the “Save” button. After the saving process is complete, you are returned to the “Vendors/Customers/Visitors List” screen (see figure 16).

Maintaining Departments

The department is the department of the person that the visitor is visiting to see.

To add or change a department, select “Departments” submenu under “Reference Data” – “Reference Data” is a submenu under the “Maintenance” main menu. After selecting “Departments”, the “Departments List” screen is displayed – see figure 22.

To add a new department, click on the “Add New” button. To modify or view an existing department, move the current pointer to the proper row then click the “Edit/View” button. Figure 23 is an example of the “Department” screen after clicking the “Edit/View” button.

The “Department ID” is generated by TracVisitors. The link between the visit and the department is accomplished through the “Department ID”. By using the “Department ID” as the link, the user can change any value for a department without affecting the link to the visit.

Input Fields

Department Name – Enter a unique name for the department. You can change this name at any time without affecting the links between equipment and departments.

Department Code – Enter an account code for the department.

No input fields are required – but it makes little sense to add a department without entering at least a department name.

After entering (or modifying) values for a department, click the “Save” button. After the saving process is complete, you are returned to the “Department List” screen (see figure 22).

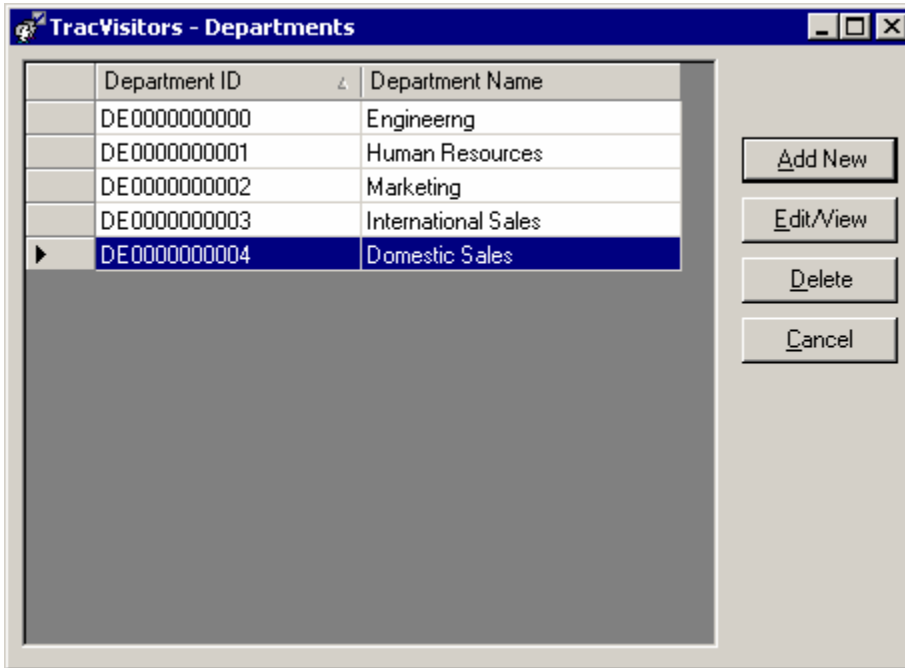


Figure 22

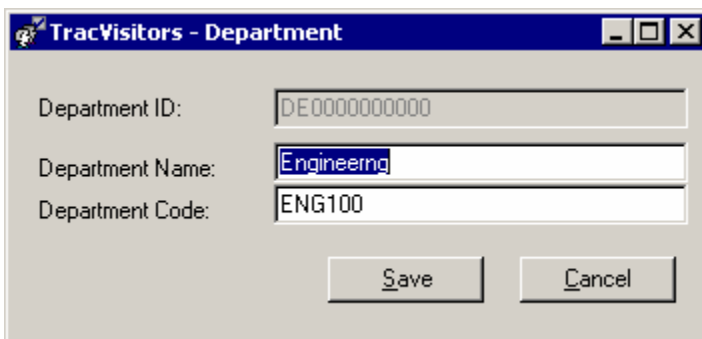
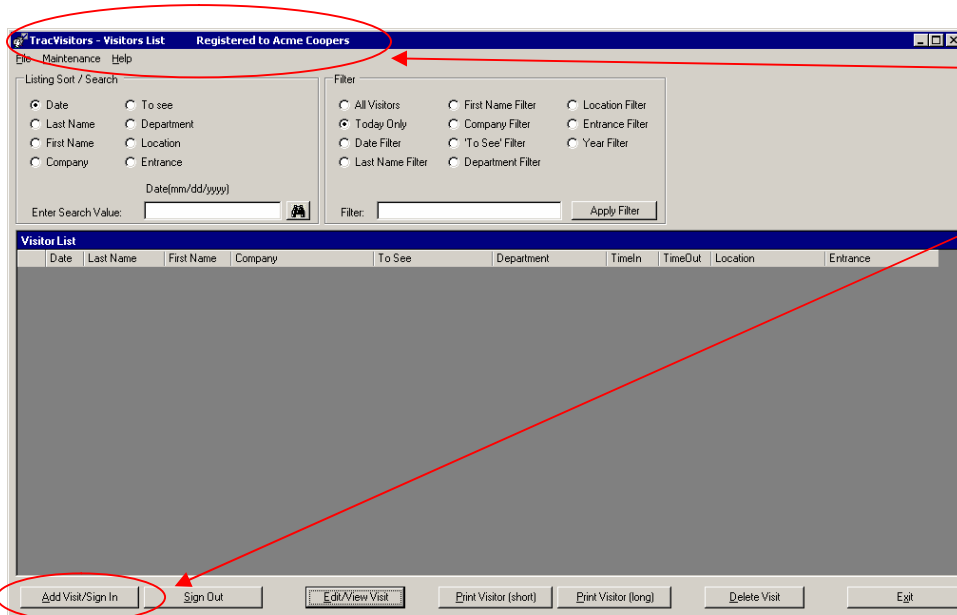


Figure 23

Adding a New Visit/Sign-in

The main objective of TracVisitors is to quickly “sign in” visitors, print badges for the visitor, and “sign out” visitors. However, secondary objectives of TracVisitors include – the ability to list all visitors based on a category or reference data - and to verify the visitor against a picture in the Vendors/Customers/Visitors table.

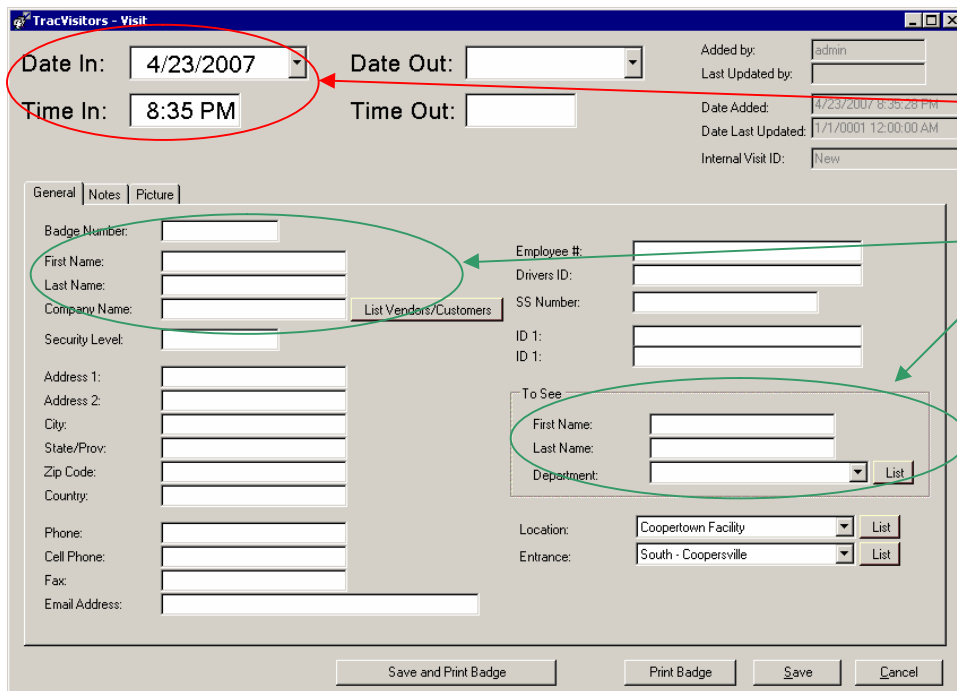
To add a new visit to TracVisitors, click the “Add Visit/Sign In” button from the main screen (see figure 24).



Main Screen
To add a new visit and sign in a visitor, click the “Add Visit/Sign In” button.

Figure 24

After clicking the “Add Visit/Sign In” button, the “Visit” screen is displayed (see figure 25).



Visit Screen
On a new visit, TracVisitors automatically sets the Date In and Time In values.

Keys Input Fields
Currently, 8 input fields are printed on the badge – badge number, first name, last name, company, “to see” first name, “to see” last name, the department the visitor is visiting, and the “Date In” date.

Figure 25

When a new visit is added, the “Date In” and “Time In” are automatically populated by TracVisitors with the current date and time.

Either a first name or a last name is required to save a visit – all other input fields are optional.

Input Fields on Visit Screen

General Tab (there are 3 tabs: General, Notes, and Picture)

Badge Number – This field is not required. If you want a badge number printed on the badge label, enter a badge number here. If the badge number is entered by not printing on the badge label, check the “Workstation Configuration” screen to ensure that the badge number is to be printed.

First Name – Enter the first name of the visitor.

Last Name – Enter the last name of the visitor.

Company Name – The company name could be entered manually or populated automatically from the Vendors/Customers/Visitors List screen. To display the Vendor/Customers/Visitors List screen, click the “List Vendors/Customers” button to the right of the Company Name input field.

Companies that regularly visit a facility should be entered into the Vendors/Customers/Visitors list.

NOTE: If you select a company from the Vendors/Customer/Visitors list screen – AND you did not enter a first name or last name for the visitor on the Visit screen, TracVisitors will bring over the Visitor’s name (and picture) from the customer’s record.

Security Level– This input field is not used at this time – however, a security level can be entered.

Address 1 – Enter the visitor’s address.

Address 2 – Enter the visitor’s address.

City – Enter the visitor’s city.

State/Providence– Enter the visitor’s state.

Zip Code – Enter the visitor’s zip code.

Country – Enter the visitor’s country.

Phone Number – Enter the visitor’s phone number.

Cell Phone– Enter the visitor’s cell phone number.

Fax – Enter the visitor’s fax number.

Email Address – Enter the visitor’s email address.

Employee #– If the visitor is an employee, enter their employee number.

Driver’s ID – Enter the visitor’s driver’s license number

SS Number – Enter the visitor’s social security number. **AT THIS TIME, THE SOCIAL SECURITY NUMBER IS NOT ENCRYPTED WHEN IT IS SAVED TO THE DATABASE. If your operation is collecting social security numbers, you are responsible for securing the database and ensuring that social security numbers are not accidentally released to the public.**

ID 1 - Enter another ID for the visitor.

ID 2 - Enter another ID for the visitor.

“To See” First Name - Enter the first name of the person that the visitor is visiting

“To See” Last Name - Enter the last name of the person that the visitor is visiting

“To See” Department – Select the department of the person that the visitor is visiting. There are a couple methods for selecting the department. The first is to select the department from the dropdown list. To view the dropdown list, click the “DOWNARROW” on the department’s combo box. Another method to select the department is to use the “Department List” screen. To view the “Department List” screen, click the “List” button to the right of the Department combo

box. From the “Department List” screen, you can add new departments and edit existing departments.

Location – Select the location for this facility. If a default location was selected on the “Workstation Configuration” screen, then this input field is automatically populated by TracVisitors. However, you can change it using a couple methods. The first method is to select the location from the dropdown list. To view the dropdown list, click the “DOWNARROW” on the location’s combo box. Another method to select the location is to use the “Location List” screen. To view the “Location List” screen, click the “List” button to the right of the Location combo box. From the “Location List” screen, you can add new locations and edit existing locations.

Entrance – Select the entrance of this facility and workstation. If a default entrance was selected on the “Workstation Configuration” screen, then this input field is automatically populated by TracVisitors. However, you can change it using a couple methods. The first method is to select the entrance from the dropdown list. To view the dropdown list, click the “DOWNARROW” on the entrance’s combo box. Another method to select the entrance is to use the “Entrance List” screen. To view the “Entrance List” screen, click the “List” button to the right of the Entrance combo box. From the “Entrance List” screen, you can add new entrances and edit existing entrances.

Note Tab

Note – A note can be entered for this visit.

Picture Tab

Picture Filename – Select a filename of a photo of this visitor. To select a filename, click the “Browse” button to the right of the input field. By default, TracVisitors will list image files in the “Pictures” subfolder of where the TracVisitors database is located. However, you can select files from any subfolder on your computer system.

If a record was selected from the “Vendors/Customers/Visitors List” and that record had a picture filename AND no visitor name was entered on the Visit record, then the Picture Filename is automatically populated using the information from the “Vendors/Customers/Visitors” record.

Once all the information is entered for the Visit, the user can “Save and Print Badge”, “Print Badge” without saving it, or “Save” the visit. By clicking the “Save and Print Badge” button, the visit is saved to the database then the badge is printed. By clicking the “Print Badge”, only the badge is printed – no data is saved and the user remains on the Visit screen. By clicking the “Save” button, no badge is printed – but the data is saved to the database and the user is returned to the “Visit” list screen. See figure 26.

Figure 26

Visit Screen

“Save and Print Badge” is the quickest method for saving the current data and then printing a badge.

“Print Badge” is useful if you are printing badges without the need to save the data. Just enter a first name and last name, then click “Print Badge”.

After the user clicks the “Save and Print Badge” button, the “Save” button, or the “Cancel” button – the user is returned to the Main Screen. If the user added another visit or modified an existing visit, the Main Screen is updated with the information. See figure 27.

Date	Last Name	First Name	Company	To See	Department	TimeIn	TimeOut	Location	Entrance
03/25	Ellis	Amber	Jacobs Metals	Ackers, Joe	Engineering	08:14 PM		Coopertown Facility	South - Coopersville
03/25	Davies	Kelly	Jacobs Metals	Ackers, Joe	Engineering	08:08 PM		Coopertown Facility	South - Coopersville
03/25	Jacobs	Elizabeth	Jacobs Metals	Ackers, Joe	Engineering	08:04 PM		Coopertown Facility	South - Coopersville
03/25	Rentmeest					06:52 PM	06:55 PM	Coopertown Facility	South - Coopersville

Figure 27

Main Screen

Here is the main screen with 4 visits for the current day.

Current Row Pointer

On figure 27, the current row pointer is pointing to “Mr. Rentmeester”.

When the user clicks the “Sign Out” button, the “Edit/View Visit” button, or the “Delete Visit” button – TracVisitors works on the visit record pointed to by the current row pointer.

Moving the row pointer is explained under “Using the Main Screen” section.

Sign-out a Visitor

To sign out a visitor, move the row pointer to the correct visit and click the “Sign Out” button. The “Visit Screen” will be displayed and TracVisitors populates the “Date Out” and the “Time In”. See figure 28.

The screenshot shows the 'TracVisitors - Visit' window. At the top, there are input fields for 'Date In' (3/25/2007), 'Date Out' (3/25/2007), 'Time In' (8:14 PM), and 'Time Out' (8:23 PM). A red circle highlights the 'Date Out' and 'Time Out' fields. To the right, there are fields for 'Added by: admin', 'Last Updated by: admin', 'Date Added: 3/25/2007 8:15:07 PM', 'Date Last Updated: 3/25/2007 8:15:07 PM', and 'Internal Visit ID: VT0000000009'. Below this is a 'General' tab with various fields for visitor details: Badge Number (66762), First Name (Amber), Last Name (Ellis), Company Name (Jacobs Metals), Security Level, Address 1 (1234 Main St), Address 2, City (GB), State/Prov (WI), Zip Code (54311), Country, Employee #, Drivers ID, SS Number, ID 1, ID 2, To See (First Name: Joe, Last Name: Ackers, Department: Engineering), Location (Coopertown Facility), and Entrance (South - Coopersville). At the bottom, there are buttons for 'Save and Print Badge', 'Print Badge', 'Save', and 'Cancel'. A red circle highlights the 'Save' button.

Sign Out a Visitor

After the user clicks the “Sign Out” button on the Main Screen, TracVisitors displays the Visit Screen and automatically populates the “Date Out” and “Time Out” input fields.

To complete the process, the user must click the “Save” button.

Figure 28

If the user tries to change the “Date Out” on a completed visit, TracVisitors will change the “Date Out” and “Time Out” to the current date and time.

Using the Main Screen

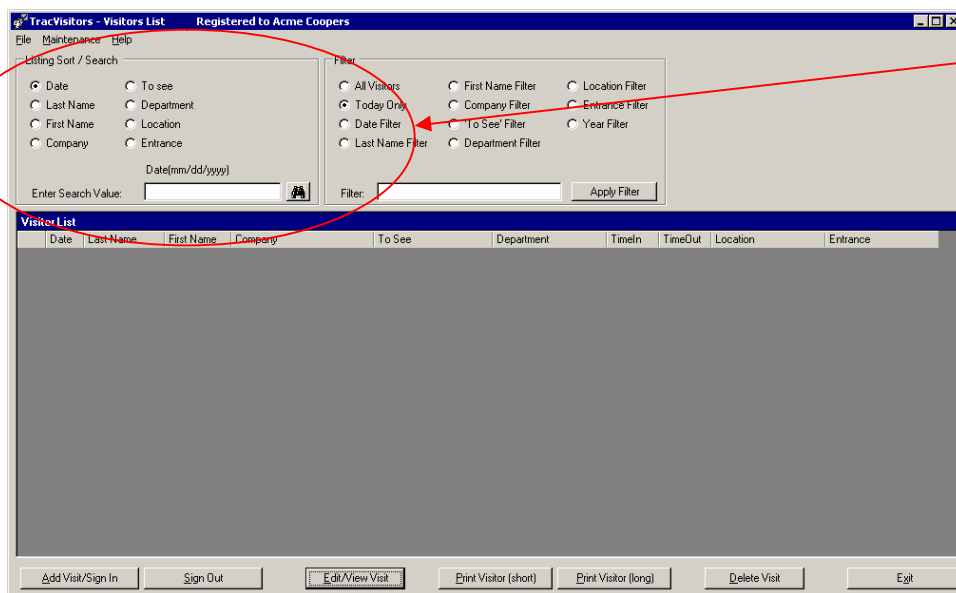
From the main screen, you can run a variety of sorts and searches on the visits– as well as applying filters and running reports (see figure 29).

The main screen lists all visits that fall under the current filter. For example, if the current filter is “Today Only”, only visits with a “Date In” equal to the current date will be listed. However, if the current filter is “All Visitors” then all visits in the database will be listed.

Also note – the default “listing order” (sequence of visits) is by the “Date In” column in descending order (meaning the person that signed in last is listed first). We commonly refer to the “listing order” as “sort order”.

There are several methods to change the “sort order” (the sort column). One method is to use the radio buttons in the “Listing Sort/Search” frame.

Please note – when you first change the sort after restarting TracVisitors, there is a delay. All subsequent sorts should not experience the delay. The reason for the delay is that the .NET framework must load additional components – but after the components are loaded, you should not experience additional delays.



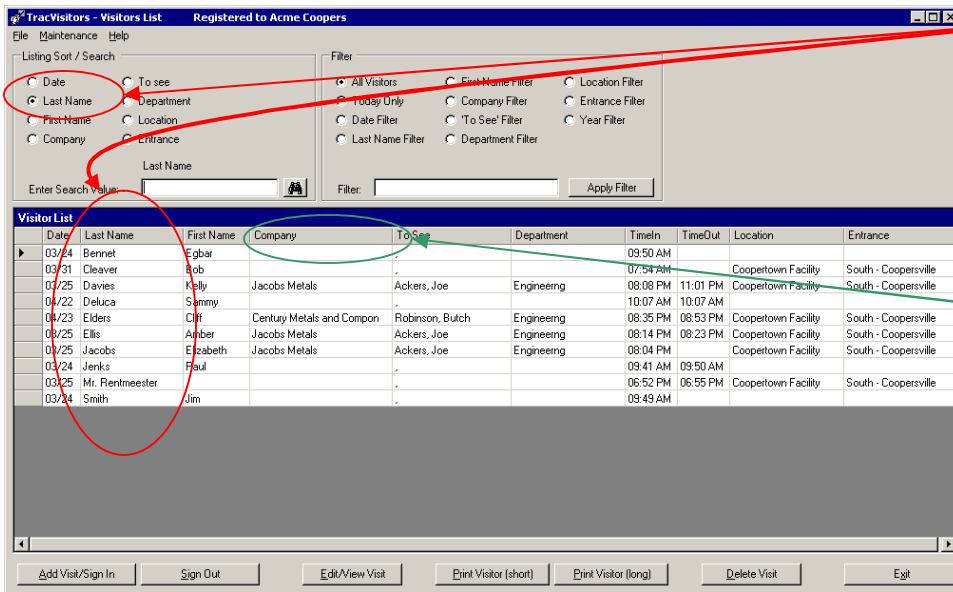
Listing Sort/Search Frame

In this frame, you can change the “sort order” (the sort column) by selecting a different radio button. For example, if you select “Last Name” then visits will be sorted by the visitor’s last name (see figure 3).

Figure 29

Another method for changing the sort order/sort column is by clicking on the column title. Some column titles are: Date, Last Name, First Name, Company, To See, Department, etc. The first time you click on a column title, the column is sorted in ascending order. If you click the same column a second time, the column is sorted in descending order.

To search for a visit by a sort/listing, first select the sort order in the “Listing Sort/Search” frame. Next, enter the value into the “Search Value” input field – then click the “Find” button (see figure 31).

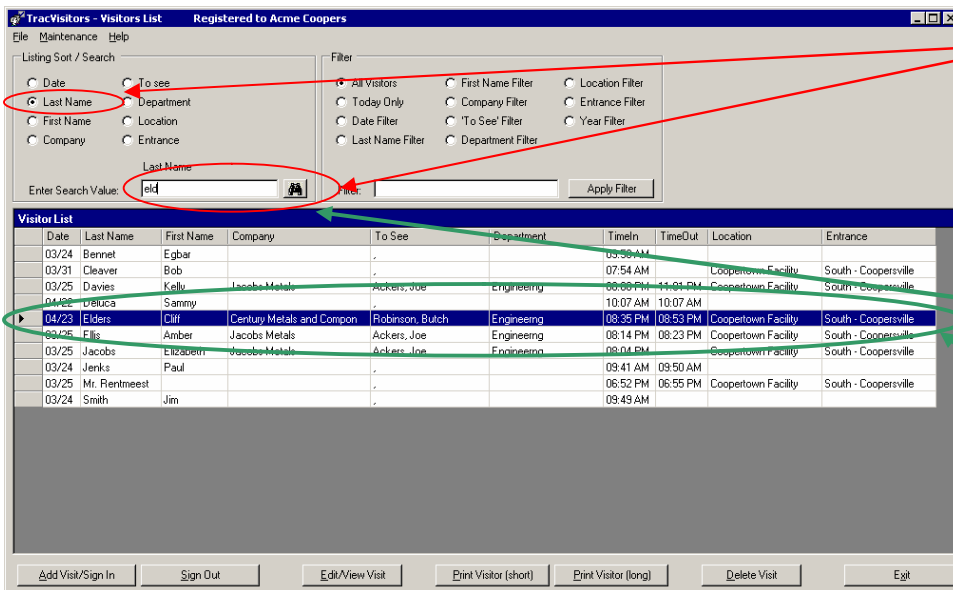


Listing Sort/Search Frame
The sort column was changed to “Last Name”.

Sort Column
Another method for changing the sort column is to click on the column’s title.

Figure 30

The user can search for a visit on any column displayed.



Sort Order/Find
To search for a visit, first select the sort order – then enter a search value and click the “Find” icon/button.

Example – Figure 31
In figure 31, the sort order is “Last Name” and the user entered a search value of “eld” and clicked the “Find” button. TracVisitors found the first visit with a last name starting with “eld”.

Figure 31

Another valuable feature available on the main screen is the filter. The filter allows the user to select a subset of all visits based on a particular column and value. For example, if the user only wants to list visitors from a particular company, then first select the “Company Filter” in the “Filter” frame. Next, enter a company’s name in the filter value. Then click “Apply Filter” – see figure 32.

NOTE: Instead of entering the full company name, the user can enter the first few characters/letters of the company name. All company names that match the filter will be applied.

NOTE: The selections in both the “Listing Sort/Search” area and “Filter” area are applied.

To Apply a Filter

First select a filter

Next, enter a value.

Then, click the “Apply Filter” button.

The Filter Result

Three (3) visitors were from the Jacobs Engineering company.

Date	Last Name	First Name	Company	To Job	Department	TimeIn	TimeOut	Location	Entrance
03/25	Ellis	Amber	Jacobs Metals	Ackers, Joe	Engineering	08:14 PM	08:23 PM	Coopertown Facility	South - Coopersville
03/25	Davies	Kelly	Jacobs Metals	Ackers, Joe	Engineering	08:08 PM	11:01 PM	Coopertown Facility	South - Coopersville
03/25	Jacobs	Elizabeth	Jacobs Metals	Ackers, Joe	Engineering	08:04 PM		Coopertown Facility	South - Coopersville

Figure 32

The user can apply several different filters. The filters are listed in the “Filter” frame. Here are a few notes about several of the filters:

All Visitors – this option will list all visits in the database

Today Only – this option will list all visits with a “Date In” equal to today

Date Filter – this option will list all visits on a particular month/day. Examples of entry are: “03/25” or “12/22”. **“03/22/2007” will not work** – the current year is applied.

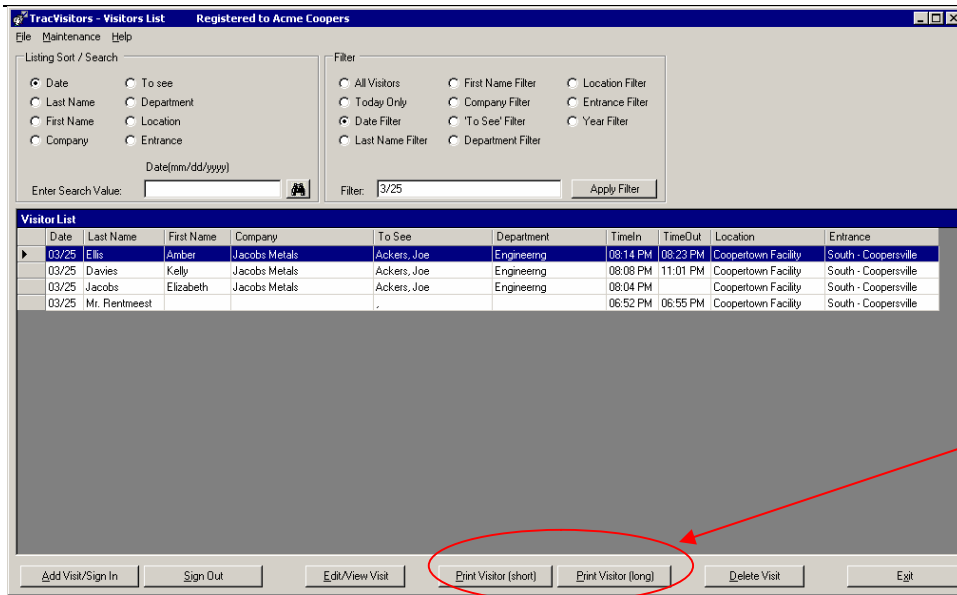
Year Filter – if the user does not purge old visits, then the user can view visits from a particular year. Examples of entry are: “2007” or “07”.

NOTE: The user can also use TracVisitors search capabilities while a filter is applied. The search will only search visits that are in the filter result.

Reports

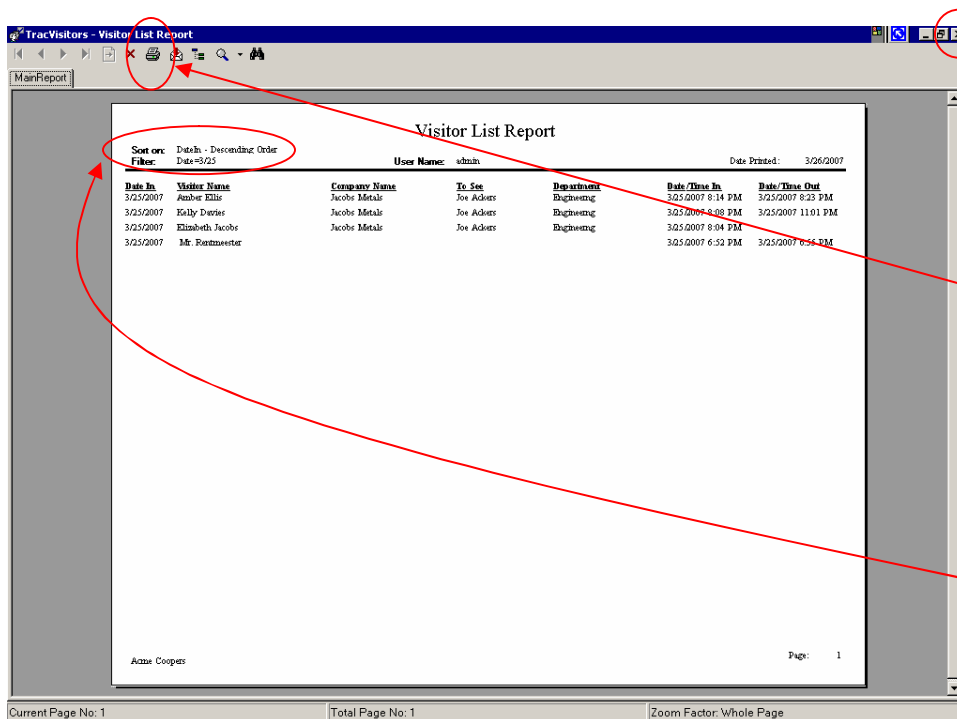
TracVisitors has two reports – however, the sort and filter entered on the Main Screen are applied to the report. Both reports have buttons and are available from the “Main Screen” - see figure 33.

Figure 34 shows the “short” report based on the filter entered on figure 33. Reports are first displayed to the screen, then the user can print the report or close the screen. To print the report, click the “Printer” button/icon. To close a report screen, click the “X” in the “upper right hand” corner.



Reports
The two report options are available on the “Main Screen”

Figure 33



Short Report
Click “X” to close report screen.

Short Report
Click “Printer” icon to print report.

Short Report
The sort order and filter are shown here.

Figure 34

The long report is very similar to the short report, however the long report has additional information printed for each visit.

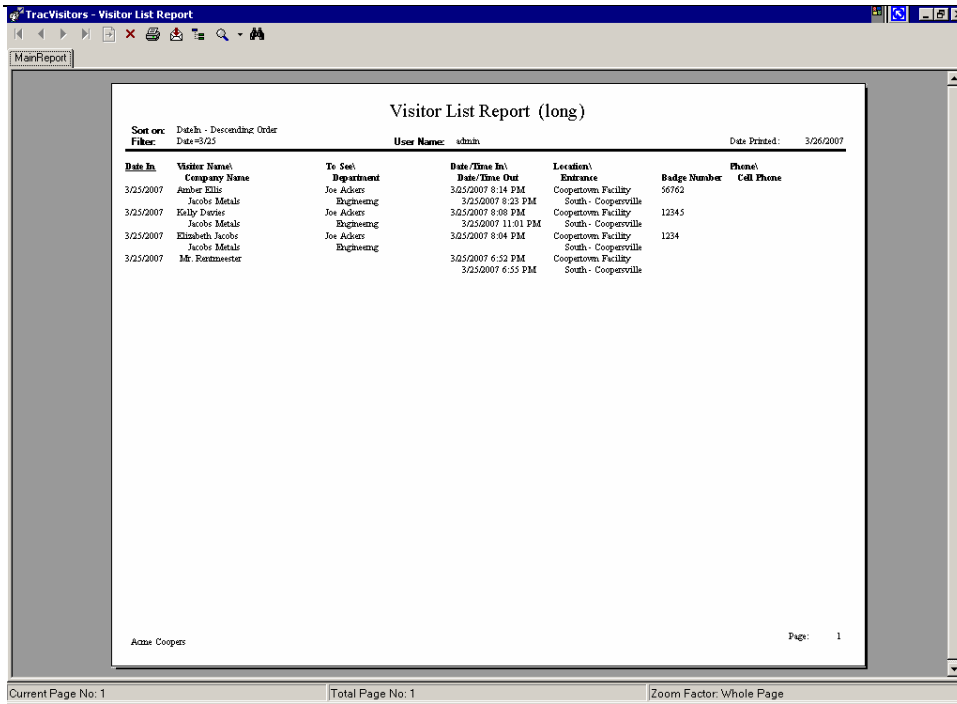


Figure 35

Updates

v1.2.4 to

At this time, there are no updates the documentation.