InfoAktiv

Setting the Standard

InfoAktiv TouchScreen

User Guide

For TouchScreen Version 2.1 - Jan 2009

Contents

Contents 2
Preface 2
Terms Used 2
Starting InfoAktiv TouchScreen 4
Quick Start 4
Quick Exit 4
The Configuration Screen 5
Content Folder 6
Configuration 6
Dongle Status 7
Printer Status 7
Printer Error Actions 7
Duplicate Data 8
Kiosk 8
Miscellaneous 9
Set Email Options 9
End of Day 10
Exiting InfoAktiv 10
Audit File Analysis 11
Display Screens 13
Control Buttons 14
Collateral Requests & Collecting User Data 15
Finishing a User Session 17
Appendix 1 - Enhancements in TouchScreen V2.1 18
Appendix 2 - Points to Note 19
Appendix 3 - Best Practices 20
Index 21

Preface

The purpose of this document is to enable Owners to start the InfoAktiv TouchScreen system, to understand the Control Panel, and to run the Display Program and End of Day process. The appendices provide further guidance and best practices for Owners to ensure that they get the best results from their TouchScreen systems..

This guide should be read in conjunction with the Content Manager User Guide

Terms Used

Owner:
The marketing person who will set up a Content Folder of information to present with the TouchScreen application.

User:
The marketing person's target audience who will use TouchScreen to browse the Owner's documents.

Session:
Every time TouchScreen is used the session number is incremented. This happens either when the kiosk times out or when a User touches the 'Finish' button. Within this session we have to assume that one User has used the kiosk.

Collateral:
The Owner's marketing information within the Content Folder. This can include PDF documents, PowerPoint presentations, video files, Flash animations, web links and audio files.

Content Folder:
The Owner's collateral organized into a hierarchy for presentation to the user. The Content Folder also contains configuration information and records of the Users' activity. On a technical level the Content Folder is a Windows folder with a number of subfolders containing standard Windows file types.

Data Capture:
The process by which we ask the Users questions about themselves (not to be confused with questions asked during a quiz). For example, when aUser requests a document be emailed we present the data capture screen to ask for the email address. The data capture screen can also be used in conjunction with the quiz screen. In this case when the quiz is defined, an associated set of questions is also defined to be asked either before or after the quiz. These questions are likely to be of the nature "What is your name?"

Microsoft Excel is a Registered Trademark of Microsoft Corporation.
Adobe is a Registered Trademark of Adobe Systems Inc

Starting InfoAktiv TouchScreen

You start the InfoAktiv TouchScreen application by double-clicking or double-touching the InfoAktiv TouchScreen icon on the Windows Desktop.

As the application starts, you will be presented with the banner as seen on the left. The screen will flash with a keyboard layout as it starts - this is normal.

Quick Start

If your TouchScreen system is already set up, and/or you are not given a specific set of checks to follow, then the simplified quick start is as follows.

Check that the correct Content Folder is selected, if not the Select the correct folder.

Check that the Dongle Status is 'OK', if not then check that the dongle is inserted in the correct USB slot.

Touch the 'Start' button.

Quick Exit

Exit from the content display screen is by touching the 'Search' button and entering the correct password in the 'search words' slot. The Configuration panel is then displayed, as above.

Touch the 'Stop' button to exit the TouchScreen application.

The Configuration Screen

After a short time you will be presented with the main configuration page, as shown below, with the 'Daily Activity Summary' showing the activity on the kiosk by date.

Daily Activity Summary, as the name implies, shows all the activity on the Kiosk or Counter-top. Each column is dated and, as you can see on the left, each row represents a specific activity so that you are able to assess the amount and type of data that will be held in your audit file – more about that and the Activity Summary later (see under 'Kiosk' section); for now touch the 'Close' button.

This next screen is the main configuration page which allows InfoAktiv TouchScreen to be set up. The main controls are grouped into a number of panels, each of which will be discussed in turn.

Content Folder

The Content Folder is a Windows folder and its sub-folders that contain the material ('Collareral') that Users can access. The currently selected Content Folder is displayed at the top of the Content Folder panel.

A Content Folder is selected using the **Select** button in the Content Folder panel. Content Folders should reside in the C:\InfoAktiv directory. You can have any number of different Content Folders in C:\InfoAktiv to choose from.

If the Content Folder is to be used for the first time, it must be added using the **Load New** button. Generally a new folder would be loaded from a USB stick in which case the application will first copy the content into C;\InfoAktiv. You should be aware that, if the New Content is replacing a folder of the same name, this will be handled by the application renaming the old content folder to *'folder name old'* – so you don't have to worry about renaming the replaced directory. You may, of course, want to delete folders as they are made redundant.

Once the desired Content Folder has been selected, the presentation can be started using the **Start*** button. The application is closed by pressing the **Stop** button.

***NOTE** - The USB dongle must be present before the display program can be started (see Dongle Status, in the third panel to the right, for more details).*

**** NB** When the presentation is running, to return to the configuration screen you need to touch the 'search' button and enter your chosen password.*

Configuration

The Attractor is the default screensaver/presentation that will be displayed on TouchScreen while it is not in use. This can be in either Microsoft PowerPoint, Adobe Flash or Windows Screensaver format. The attractor can be specified by pressing the **Set Attractor** button and browsing for .scr, swf, pps or ppt files.

The **Timeout** is the length of time that must pass between the last User interaction with the kiosk and the Attractor being displayed. The Timeout period can be altered using the **Set Timeout** button. Once the Timeout period has elapsed, any previously entered User data will be cleared into the audit file and the current session will be ended.

The '**Block Web**' button should be set as required. If it is set to 'Web Off', the User is informed that 'Internet Access is not available' if a document hyperlink is selected.

The **Set Volume** button allows the volume and sound settings to be modified.

The **Show Cursor** box allows the cursor to be either displayed or hidden. Generally, when using the TouchScreen, the cursor is hidden. If using a keyboard then it would be sensible to 'Show' the cursor.

Dongle Status

As a security feature, the InfoAktiv application requires that a USB dongle is attached to the local machine.

NOTE: The security dongle must be located in a specific USB port.

If the dongle is not present, the application will not run. A red crossed icon in the Dongle Status panel indicates that there is a problem with the dongle, whilst a green tick indicates the dongle has been successfully detected. If the dongle is attached after the configuration screen has been displayed, or is not automatically detected, it may be necessary to press the **Check Dongle** button. Once the dongle is successfully detected, the **Start** button in the Content Folder panel will be active.

Printer Status

The Printer Status panel gives a quick summary of the status of the printer if one is connected. A red crossed icon indicates that there is a problem with the printer, whilst a green tick indicates the printer is ready. Further details of the printer status can be obtained by pressing the **Detailed Status** button. Note: TouchScreen works with a specific network-attached printer in order to avoid Windows print dialogue boxes from appearing when they're not wanted.

Printer Error Actions

You can specify if an error message is to be displayed to TouchScreen Users in the event of a printer running out of supplies or malfunctioning. A default warning icon will be displayed if no custom message is entered. There is the option of adding a default message *"Printer Needs Attention Please Inform Staff"* which can be selected using the **Default** button or a custom message can be specified by pressing the **Modify** button.

Duplicate Data

This provides the facility to protect the data that Users enter by recording a duplicate copy of it to another drive. To activate this facility, before starting the TouchScreen application, connect a drive or USB stick that contains a file called 'dupdrive.txt' in its root directory. The application will automatically detect the USB and turn on data duplication.

Alternatively, if the application is already at the configuration screen, connect the USB stick with the dupdrive.txt file and check the 'Duplicate' box; TouchScreen will then check for the presence of a USB stick.

This drive must not be removed while the data duplication is 'on'.
Duplication can be stopped by un-checking the 'Duplicate' box. The data will no longer be copied onto the duplication drive. The drive can then be removed, **BEFORE** the 'Start' button is pressed.

Kiosk

The **Modify ID** button allows a unique identification to be assigned to each kiosk. This ID will make up part of the name of the files produced by the End of Day processes to allow the source of the files to be easily identified. The current ID is displayed in the Kiosk panel. Pressing the **Modify ID** button allows a custom ID to be entered.

The **Set Password** button allows you to change the password that is used to return from the public display screens of the kiosk to this configuration screen. When delivered, the kiosk will have a password of *'ex1t'* set, note the numeric '1' – you should change this before public use as this is not secure.

The **Activity Summary** button displays a summary of the usage statistics for the kiosk, generated from all the audit files it finds in 'config' folders under c:\InfoAktiv and its subdirectories. It is shown in a tabular format with column headers representing the latest 15 days on which the kiosk was used, and the row headers representing the actions performed (e.g. Contact Request).

- The table data shows the number of times the action was performed on a particular day.
- The last column shows the total count for each action.

- The last row - ‘Audit Data Downloaded’ tells the owner if all the audit files for that day have been copied to a USB or another device (the end of day process). It will say: ‘YES’ (in green) if all data has been downloaded since that day; ‘NO’(in red) if the data for that day has not been downloaded; ‘SOME’ (in orange) if there has been a download that day, but the kiosk has since been used and generated more data.

Miscellaneous

Displays details of the current application, Quiz Format version numbers, and whether normal or detailed diagnostic trace information is being collected.

Set Email Options

One of the major enhancements in V2.1 is to email User-requested collaterals automatically; this is accomplished through the Settings button.

Touching the Settings button produces the dropdown as shown with three options.

The first option is the same as TouchScreen V2.0. Collateral requests are recorded in the Audit file for fulfilment using a separate Email marketing program or CRM system.

With the second two options TouchScreen creates the Emails automatically. The sending options are as stated and obviously depend on web and email access being available.

Note that email access is through Microsoft Outlook and will need to be set up in accordance withy your company procedures.

End of Day

The End of Day panel allows you to extract the data that TouchScreen has collected. The **'Copy Data**' button is used to copy the audit file of the current Content Folder to a USB memory stick. When you click this button, you are prompted to select the location where the audit file is to be copied. A folder called <kioskID>-audit-<date> is created in the selected location. Within the folder, a file called <kioskID>-audit-<date>.txt is created. All the audit data is copied into this file.

If any "Email Requests" are encountered in the audit file, the document associated with the request is also copied into the folder created.

NOTE: If two files in different subfolders share the same file name, only one of them will be copied to the End of Day data folder created.

The end of day process will download the entire audit file, not just one day's data; it also merges the audit header file in the process so that you know to what each column of data refers. To avoid confusion, once copied, you may want to delete the audit file from your Content Folder's '~config' sub-folder after downloading it, or move it from the ~config folder to another directory on the kiosk. The TouchScreen application will automatically create a new audit file as soon as the content folder is selected and the start button is clicked/touched.

Exiting InfoAktiv

In order to return from the User screens to the Owner's Configuration screen you should press the '**search**' button, type the password, and click or touch 'enter' (originally the password was set as 'ex1t'). This will take you back to the configuration screen.

You may now choose to either carry out a new selection or task from the configuration panel, or to exit the application completely by pressing the '**stop**' button.

Audit File Analysis

The copied audit file will be a '.txt' file that can be opened and analysed using Excel or a similar product – the following procedure is using Microsoft Excel, and the options used within the wizard should be the default options. Within Excel, select the .txt file for opening and the text import wizard appears.

Step 1 - The file is delimited, starts at row 1 and the file origin is DOS. Click 'Next'

Step 2 – The delimiter selected is *'Tab'* and the qualifier is ***",*** Click *'Next'*

Step 3 – Column data format should be *'Text'*, Click *'Finish'* – selecting 'Text' avoids dropping the leading zeros from phone numbers for instance.

Step 4 – On the spreadsheet, adjust the column width as normal by double-clicking in the top lettered cell on the bar to the right of the cell.

Step 5 – From the spreadsheet toolbar, select 'Data/Filter/AutoFilter' and drop-downs should appear on each column.

Note that the more questions you have in your content, the more columns are present. Using the filter drop-downs, you can identify the various requests for information and contact as well as the content viewed.

Display Screens

When the 'Start' button is touched, TouchScreen displays the chosen Content Folder; the screen shot below shows the CM Demo display as created within the 'Content Manager User Guide' plus a few additions.

At the top of the display is the banner picture spanning the screen width 1280x95 pixels, followed by the chosen title of the page, then the first six items of collateral. The title of each item is also accompanied by the jpeg icon as selected in the Content Manager.

If there are more items to be displayed then up and down arrows appear in the enclosed ellipse on the right of the screen

The buttons below the collateral display are discussed in detail in the next section.

The bottom line of the screen displays the collateral trail or a **'Loading….'** Message if the system is busy loading a large presentation for instance.

Control Buttons

These buttons are located at the bottom of the screen:

Home – takes the display back to the main screen, the first collateral screen displayed.

Back – takes the display back one screen

Search – this button has two uses and when touched the User is presented with a touch screen keyboard. The two uses are:

- to exit the collateral display using the 'exit password'
- to enter a search word or words to display specific collateral. Keywords may be part of the title of the documents and specific keywords as defined when setting the collateral up in the Content Manager.

Help – Help text relevant to the display

Contact Me – takes the User to the set of questions as defined when setting up the content in the Content Manager

Custom Buttons - there are two optional Owner-defined custom buttons. Only one button has been defined in the CM Demo display shown above, this has the button title of 'Welcome to InfoAktiv' which displays the rtf file selected during set up using the Content Manager.

Finish - each time a User interacts with a kiosk to request collateral a certain amount of data is collected, as defined by the owner, depending on the type of request for collateral. That data is retained by the TouchScreen until the User elects to finish the session by touching this button and clearing the user data

Collateral Requests & Collecting User Data

Once specific collateral is selected by the User, a number of options are made available for the User to be able to take a copy of that collateral, providing those options are permitted. Whether collateral may be copied and which copy method is made available, is determined by the owner and set up using the Content Manager.

In the screen shot below, the printer option is not available, so is 'blacked out'. Some collateral such as video, research data, or where copyright is not owned, may be restricted and each item of collateral can be copy controlled as required.

The questions associated with each button are defined during the content build process using the Content Manager, and are appropriate to the request method chosen

Once a method is chosen the User is presented with a screen similar to the one shown below, which is for an email request.

Where answers are ‘required’ they are asterisked and if there is more than one page of questions then a ‘next’ button will appear. Data is entered using the touch screen keyboard, which is laid out much the same as a normal keyboard, or if applicable, a badge scan input may be used.

When the ‘**Submit**’ button is pressed, depending on the request option, the User may be requested to insert the USB memory stick or in this case an email confirmation as shown in the following screen shot.

Notice that the User has the option to '**Continue Browsing'** which has two effects. The entered data is retained by the TouchScreen application, so that in the event of further collateral being requested, the User does not have to re-enter the data. Secondly, only the first character of each answer is displayed, the rest being asterisked out for security.

The User also has the option to '**Finish'** the session and clear the User data

Finishing a User Session

Once the TouchScreen application is started it also starts to record, in the audit file all interactions of collateral viewed and data entered. It is essential that once a user has entered data and finished with the kiosk then that user's data is cleared and session completed – it will still be recorded in the audit file though.

The user data and session can either be cleared through a presented option, following a request, or by touching the 'Finish' button at the bottom right of the display screen.

Appendix 1 - Enhancements in TouchScreen V2.1

Version 2.1 contains the following major changes:

- Automatic Email fulfilment: When a User requests information from TouchScreen, the system can now create an email using a defined template and either send the Email immediately or store it for transmission when a network connection becomes available.
- Direct access to web links within documents is now available and onward control can be specified using Content Manager V2.1.
- Both folders and content can now be ordered independently from Windows Explorer's ordering criteria.
- Folder icons can now be replaced with a picture jpeg.
- Flash movies have been implemented, and may be used as an attractor, as well as be played in 'Full Screen' mode.
- Exec and Windows Shortcut files have now been implemented. – please note the cautions in the 'Points to Note' section below.
- New banner picture size spanning the full screen width and measuring 1280x95 pixels.
- Two customised buttons can now be specified.
- Show/Hide Cursor switch on the Configuration Screen.
- Volume & Sound control setting from the Configuration Screen.
- Optional Barcode scanner can be used to collect User details.

Prerequisite Software Levels

- Microsoft Windows XP SP3,
- Microsoft DOT NET 2.0
- Microsoft Office 2007,
- Internet Explorer 7,
- Windows Media Player 11,
- Adobe Reader 9,
- Adobe Flash Player 10

Appendix 2 - Points to Note

Security & Antivirus Software
Please note that, with web access available, the customer is responsible for installing and maintaining their own anti-virus and security software that should be in accordance with their own company procedures. We would advise setting the software up so that it remains in the background and does not cause windows to pop up when the TouchScreen Display program is running.

Email Access
MS Outlook has been provided and this should be set up according to company requirements - for instance, VPN access. It is also suggested that an Exhibition or Events 'Task-ID' email address is set up separate from personal emails. This has two advantages: personal email boxes are not filled with all exhibition requests, and, with a change of personnel, there is no need to change the email address for the exhibition or event. In MS Outlook, email should be set up to be sent immediately.

Exec Files and Shortcuts
Exec, '.exe' and application shortcut implementations should be used with care as they could compromise the security or the normal running of the TouchScreen application. The following should be considered when setting up any of this type of content:

- Consideration must be given to the location of the material content and the fact that it may not be automatically copied with the TouchScreen 'Load New' button if it is not contained within the overall content folder.
- If the material is contained within the content folder, then consideration should be given to placing content within a ~config folder so that they are not displayed as collateral content. (~config hides its content from the TouchScreen display).
- Exec files that are hard-coded with the content location should be built with the above points in mind, or create a Windows Shortcut by right-clicking on the exec file and copying the shortcut to the appropriate location.
- If the application allows access to the internet, then the standard security practice should be observed.
- On exiting an application started through an exec or shortcut, it is the responsibility of the application to clean-up and pass control back to the TouchScreen application.
- None of the actions – 'Print', 'Copy to USB', 'Email', 'Contact me' will be available to an application started through an exec file or shortcut. In other words, the detail document viewing screen of InfoAktiv will not be able to be opened.
- The TouchScreen will not be able to handle any problems/ crashes/ exceptions occurring in the exec or shortcut file or its application.

While these caveats should be considered, they are not onerous, and execs and shortcuts can provide some spectacular effects. Wherever possible please ensure that the designers of this type of content are made aware of these cautions so that they can build their material to be best displayed by the TouchScreen application. It is also recommended that shortcuts be created rather than using exec files directly.

Appendix 3 - Best Practices

In order to use your InfoAktiv TouchScreen system to good effect, the following are some hints to be considered:

1. Plan and prepare properly

   - Know what your event objectives are.
   - Know who your audience is.
   - Know what you want to achieve by using InfoAktiv.

2. Think about how you expect the InfoAktiv system to be used – will there be many short Sessions requesting information, or protracted Sessions browsing? Trying to service both types of User on the same system could create a conflict when it is busy.

3. Ensure that folder and document titles are informative. As far as possible, lead the customer to the important information that you want them to look at.

4. Try to segment the content as finely and logically as possible. – people struggle with long lists of items.

5. When capturing User information, don't ask too many questions. Just as on the internet, too many questions put people off.

6. Test your creation – make sure your content appears as you want it to.

7. Attract the customers, tweak people's curiosity or give them a reason to use the InfoAktiv TouchScreen and view your content:

   - Use the 'Attractor' screen – the use of graphics is a good idea and a relevant attractor screen is essential if you aren't actually leading users to the machine.
   - Encourage them to touch it !
   - Set up a 'draw' or 'promotion' using the quiz facility.
   - 'Give aways' – some companies give away USB sticks to draw customers to the InfoAktiv system and it also enables the customer to take copies of information that you want them to keep.

8. InfoAktiv TouchScreen works best when integrated in the sales process – show the booth staff how it works so that they can use it as a sales aid/prompt.

9. Ensure that there is a follow-up process in place.

10. After the event:

    - Analyze the audit files for content viewed and requested to see if there are any lessons to be learned
    - Check with event staff to collect their thoughts and views
    - If possible, ask the customers.

Index

Activity Summary 8
Back button 14
Block Web 6
Check Dongle 7
Contact Me button 14
Continue Browsing 17
Copy Data 10
Custom Buttons 14
Detailed Status 7
dupdrive.txt' 8
Finish button 14, 17
Finish session 17
Help button 14
Home button 14
Load New 6
Loading 14
Modify ID 8
Printer Default Error 7
Printer Modify 7
Search 10
Search button 14
Select 6
Set Attractor 6
Set Password 8
Set Timeout 6
Set Volume 7
Show Cursor 7
Start 6
Start button 7
Stop button 6, 10
Submit button 16
Timeout 6