Picture ID

Picture ID is an optional software package which allows the credit union to store the member's picture identification in VIEW. The picture identification for secondary names can also be stored in VIEW. The picture ID can be viewed by tellers and other employees, as needed.

An HP Scanner, scanshell scanner or Digital Camera is required to scan or take a picture of the member's ID. Contact Datamatic for more information.

Remote Client Option (RDP)

The Picture ID can be uploaded to VIEW from the Name Information window for the primary member or secondary names. Prior to using these options, the member's ID can be either scanned using the HP Scanner (which uses its own software or the Datamatic scanning software on page 11), or scanshell scanner, or photographed using a Digital Camera. The Jpeg Image (.jpg) must be saved in the Datamatic folder on C:Drive (C:\Datamatic).

**Note: First try loading the driver and software that is included with the scanner that is purchased. Next, the scanner needs to be selected on the Station Setup window (General tab).

See page 9 for instructions for Picture ID scanning directly from VIEW.

Teller Security

Proper security must be given to employees that will be allowed to the Import or Scan icons on the Edit Name window. This is used to upload the Picture ID for an existing name record. The security option can be found by selecting:

> System Settings
> Tellers
> > Select the employee
> > Basic tab
> > Picture ID (This must be checked which means "permitted".)

No special security is needed to be able to view the Picture ID's in VIEW.

Name Information

The Name Information Edit window can be used to view a Picture ID, as well as, Import/Scan, Copy, Export, Rotate or Delete a Picture ID.
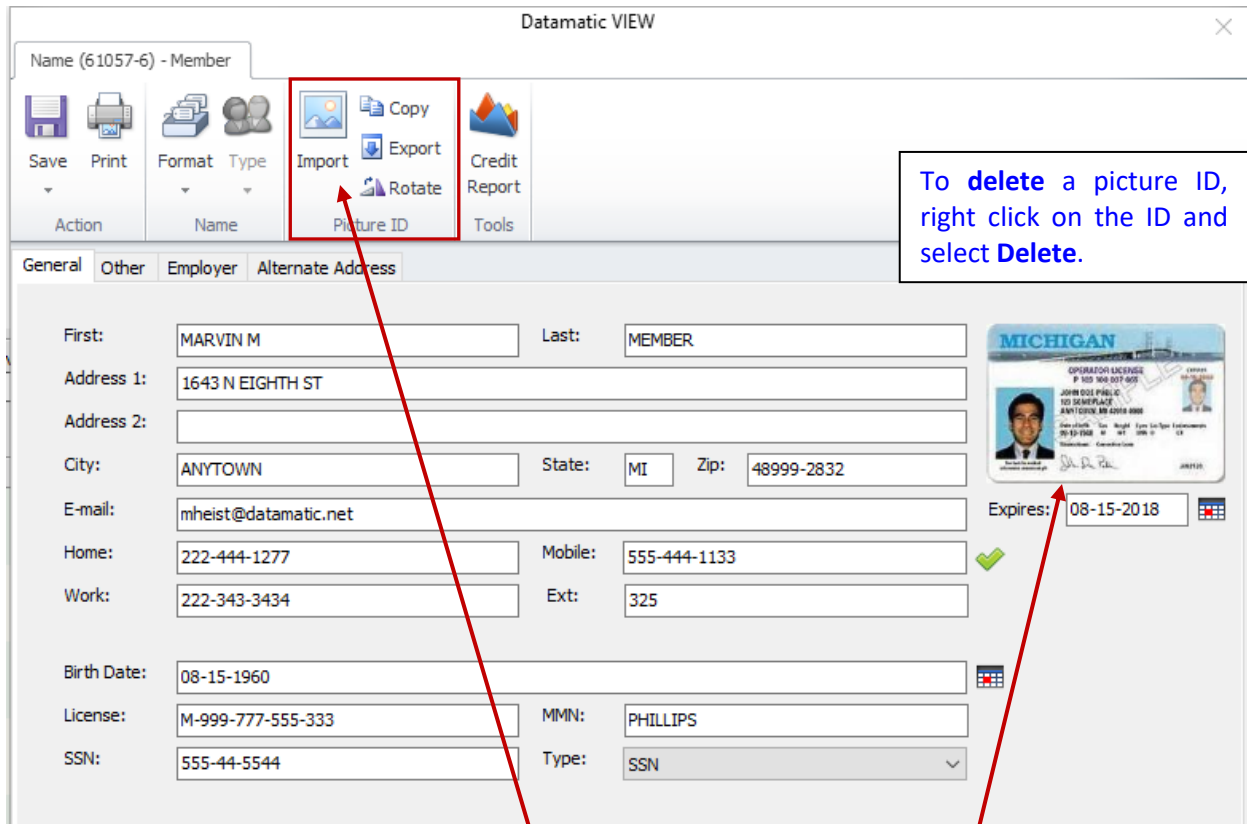

To **delete** a picture ID, right click on the ID and select **Delete**.

Figure 1

Click on the Picture ID to enlarge, if desired.

If the Scanner is directly attached to the PC and a scanner is selected under Station Setup, then the **Scan icon** will show on the Name Information window at the top.

If the Scanner is directly attached to the PC and a scanner is <u>not</u> selected under Station Setup, then the **Import icon** will show on the Name Information window at the top. Credit unions using Terminal Server may see the Import icon.

In the same area are the selections for **Copy, Export and Rotate**.

All Picture ID's must be stored in the Datamatic folder on C:drive, unless scanning the ID's directly from VIEW. If importing the Picture ID from C:/Datamatic folder, the available picture ID's will be displayed so that a selection can be made.

The **"Copy"** icon is used to copy a picture ID "This Account", "Cross Account" (if applicable) or "Other Member", if necessary.

The **"Export"** icon is used to copy a Picture ID to the PC, if needed. After making the Export selection, the **"Save As"** window is displayed for selections to be made as to where the file should be saved.

The **"Rotate"** icon is used to rotate a Picture ID that is not facing in the correct position to be viewed normally. ****Note:** Each time the "Rotate" button is selected; VIEW uploads a new rotated image. This will show on the Audit Name and Address window with a description of "Add Picture ID".

Enter the **Expires** date in the space below the ID. Select the Save icon.

After adding the picture ID to VIEW for the primary member, the **"Picture ID on File"** option under Member Information will automatically be changed to "yes". The same is true for secondary names automatically changing the **"Picture ID on File (Secondary)"** field to "yes" under Member Information.

TIP: To print an ID, first display the Picture ID for the member or secondary name from the ribbon then select **Ctrl + P**. A window will be displayed to make a printer selection. After pressing enter, the ID will be printed.

Add Picture ID

The Picture ID can be added to the member/secondary name from the Member Ribbon.

Before adding ID:
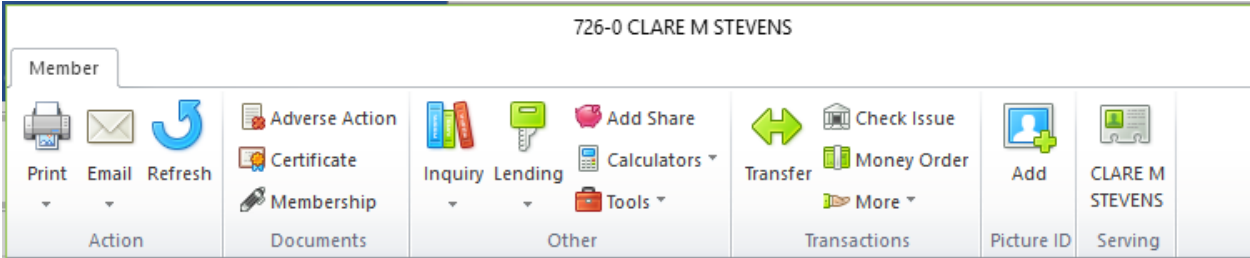
Figure 2
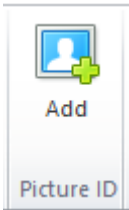
Click on [Add Picture ID icon] and the Name Information window is displayed to add the Picture ID.

After adding ID:

Figure 3

Enter the **Expires** date in the space below the ID. Select the Save icon.

Audit Picture ID

The Add, Change and Delete options for Picture ID can be audited under [Main Ribbon or Member Ribbon > Other Inquiries > Audit > Name and Address].

4   Picture ID

Expired ID

After the expiration date for the Picture ID has been reached, the system will display the word **Expired** over the ID. This also happens for the secondary names when the secondary name is selected in a search. See example below.

Figure 4

After an expiration date in the future has been entered, the word **Expired** will no longer display over the ID on the ribbon. The expiration date can be file maintained on the General tab under the Edit Name Information window.
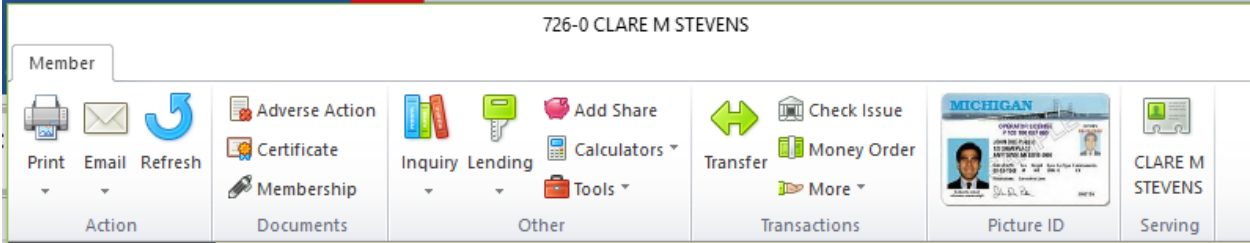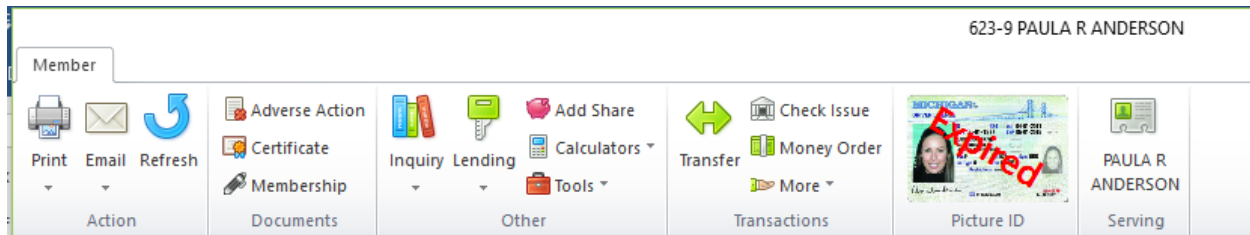
Options for Picture ID users

An option is available under [Main Ribbon > System Settings > Tellers > Options tab] called **Automatically show picture id, when bringing up member**. This option is defined for each employee.

If this box is checked, and the member has a Picture ID on the system, the Picture ID will automatically pop up for the employee when the member is displayed.

If this box is checked, and the member does <u>not</u> have a Picture ID on the system, nothing will be displayed.

Picture ID Report/Extract

A Picture ID Report/Extract can be generated, as needed, using the Picture ID selection under [Main Ribbon > Reports > On Demand]. This will generate a report/extract for either missing or expired picture ID's.

After making a printer selection, the system displays.

```
Datamatic VIEW                                                      ✕

  Picture ID                                                        🖨

 Print  Quit
 ------------------------------------------------------------- Picture ID --
                    Output            (Report) R

                    Selection    (Missing IDs) M

                    Accounts Opened After    -    -
```

Figure 5

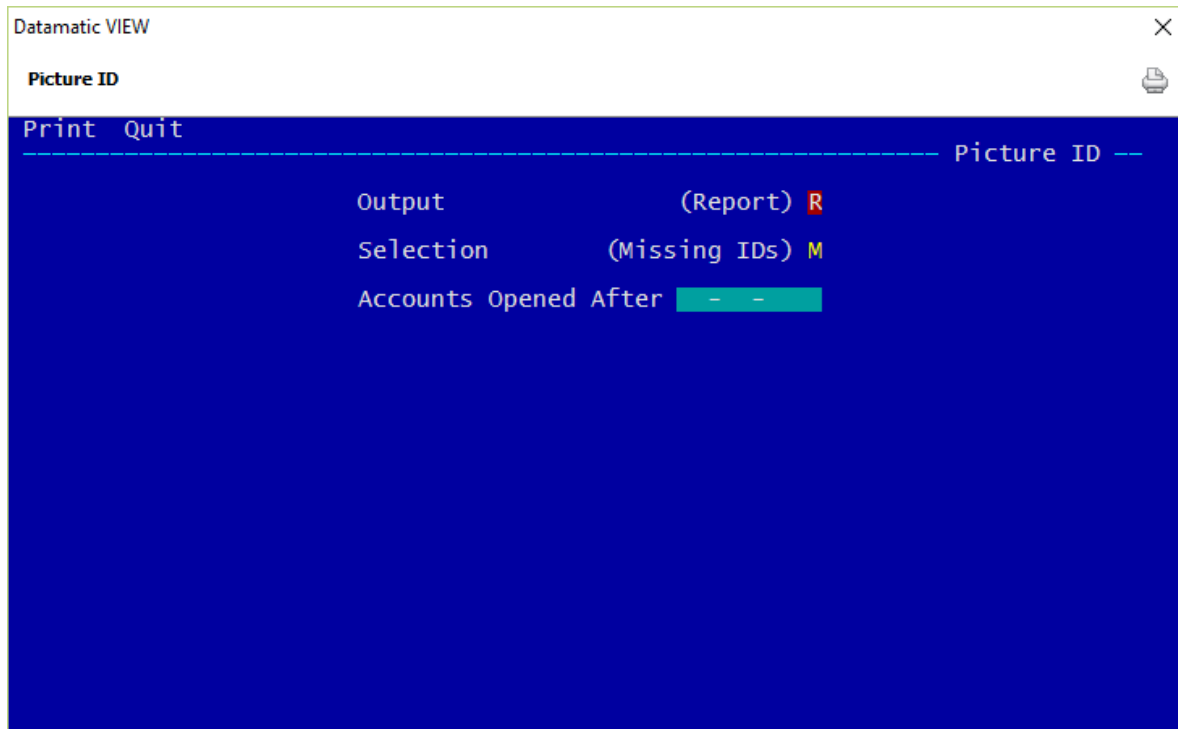**Output Selections:**   R - Report
                            E - Extract
                            B - Report & Extract

Selection: M - Missing ID's
                    E - Expired ID's

Accounts Opened After: Fill in a date, if desired.

Press enter to generate the report/extract.

Example of missing Picture ID report. (PictureID)


```
PictureID                                                              □    ×

🖨 💾  | Search [                    ]  ➡ Go

05-23-2016                            Picture ID's                          PAGE     1
Support Credit Union          (  1)                                   REPORT NO.  CR974-01

    Account    Name Type          Name              Error
--------------  ---------------  -----------------------  ----------------------------------------
     1-8-82 Joint          JANE          CONSUMER   Missing Picture ID
   223-8-81 Joint          Sonia         Milken     Missing Picture ID
   266-7-80 Joint          Wilber        Pocket     Missing Picture ID
   615-5-80 Joint          MEGAN P       JONES      Missing Picture ID
   615-5-81 Joint          MEGAN P       JONES      Missing Picture ID
   628-8-55 Auth. Signer   CAROL L       BROWN      Missing Picture ID
   771-6-05 Joint          Polly         Jones      Missing Picture ID
   808-6-00 Primary        Wally World Entertainment  Missing Picture ID (Business)
   808-6-00 Auth. Signer   Shawn         Kirby      Missing Picture ID
   808-6-73 Auth. Signer   Shawn         Kirby      Missing Picture ID
   809-4-00 Primary        Quincy Gerber Estate     Missing Picture ID (Business)
   810-2-00 Primary        Joe Smith Estate         Missing Picture ID (Business)
   811-0-00 Primary        Rylan Jennings Trust     Missing Picture ID (Business)
   813-6-00 Primary        Meghan        Wright     Missing Picture ID
   4658-1-08 Joint         FRANK T       APPLE      Missing Picture ID
   6190-3-09 Joint         STEVEN R      TELLER     Missing Picture ID
   9854-1-80 Joint         Chipper D     Ball       Missing Picture ID
  25144-7-67 Joint         THOMAS P      CARUSS     Missing Picture ID
  25547-1-87 Joint         ELAINE M      MATSON     Missing Picture ID
  41498-7-81 Joint         Sarah ElizabethGates     Missing Picture ID
  61057-6-06 Joint         MARGARET A    MEMBER     Missing Picture ID
  66334-4-81 Joint         MARTHA L      JONES      Missing Picture ID
 121212-5-80 Joint         Theresa L     Kramer     Missing Picture ID
 254888-1-80 Joint         Jenny         Cook       Missing Picture ID
 555554-5-81 Joint         BONNIE A      NEWMAN     Missing Picture ID
 621581-8-80 Joint         Gary          Smith      Missing Picture ID
 667700-9-81 Joint         Rachel        Westinghouse  Missing Picture ID
 701701-5-80 Joint         Jori          Warner     Missing Picture ID

          Total Primary:            5
          Total Joint:             20
          Total Auth Signers:       3
```

Figure 6

Example of expired Picture ID report. (PictureID)


```
PictureID                                                              □    ×

🖨 💾  | Search [                    ]  ➡ Go

05-23-2016                            Picture ID's                          PAGE     1
Support Credit Union          (  1)                                   REPORT NO.  CR974-01

    Account    Name Type          Name              Error
--------------  ---------------  -----------------------  ----------------------------------------
   221-2-80 Joint          Steven        Shubert    Expired ID: 08-30-2013
   501-7-80 Joint          Virgil        Yates      Expired ID: 08-03-2010
   754-2-00 Joint          George        Parent     Expired ID: 06-01-2015
   754-2-70 Joint          George        Parent     Expired ID: 06-01-2015
  1553-7-80 Joint          Wendy         Piper      Expired ID: 09-01-2012
 26633-8-80 Joint          Maggie        Pond       Expired ID: 02-01-2014
 50606-3-80 Joint          Ashley        Goober     Expired ID: 11-02-2012
 50606-3-81 Joint          Doug          June       Expired ID: 08-03-2010
 241460-5-80 Joint         Rhonda        Taylor     Expired ID: 10-01-2013
 241460-5-81 Joint         Rhonda        Taylor     Expired ID: 12-01-2014
 701701-5-81 Joint         Jori          Warner     Expired ID: 09-01-2013

          Total Primary:            0
          Total Joint:             11
          Total Auth Signers:       0
```

Figure 7

Example of missing Picture ID extract. (picid.txt in Download folder - csv format)

```
000000001882,0000000018,82,"Joint          ","JANE          CONSUMER        ","Missing Picture ID                        "
000000004208,0000000042,08,"Joint          ","ERIC T        FOREMAN         ","Missing Picture ID                        "
000000004209,0000000042,09,"Joint          ","ERIC T        FOREMAN         ","Missing Picture ID                        "
000000032381,0000000323,81,"Joint          ","Jacquie       Ross            ","Missing Picture ID                        "
000000610681,0000006106,81,"Joint          ","ROGER G       MILLER          ","Missing Picture ID                        "
000000610681,0000006106,81,"Joint          ","REBECCA K     MILLER          ","Missing Picture ID                        "
000000734400,0000007344,00,"Primary        ","GRACE'S ICE CREAM STORE       ","Missing Picture ID (Business)             "
000000734400,0000007344,00,"Joint          ","MEGAN P       JONES           ","Missing Picture ID                        "
000000734400,0000007344,00,"Joint          ","MARTHA L      CARUSS          ","Missing Picture ID                        "
000000734405,0000007344,05,"Joint          ","MEGAN P       JONES           ","Missing Picture ID                        "
000000734405,0000007344,05,"Joint          ","MARTHA L      CARUSS          ","Missing Picture ID                        "
000000745000,0000007450,00,"Primary        ","Outback Tours                 ","Missing Picture ID (Business)             "
000000745000,0000007450,00,"Auth. Signer   ","Brian         Larson          ","Missing Picture ID                        "
000000745073,0000007450,73,"Auth. Signer   ","Brian         Larson          ","Missing Picture ID                        "
000000747600,0000007476,00,"Primary        ","JOHN          WELLSA          ","Missing Picture ID                        "
000000747600,0000007476,00,"Joint          ","STEVE         SEATTLE         ","Missing Picture ID                        "
000000748400,0000007484,00,"Primary        ","STEVE         SEATTLE         ","Missing Picture ID                        "
000000748400,0000007484,00,"Joint          ","JOHN          WELLSA          ","Missing Picture ID                        "
000000749200,0000007492,00,"Primary        ","Doug          SMith           ","Missing Picture ID                        "
000000749200,0000007492,00,"Joint          ","Doug          SMith           ","Missing Picture ID                        "
000000753400,0000007534,00,"Primary        ","Oliver T Whittman Trust       ","Missing Picture ID (Business)             "
000000754200,0000007542,00,"Primary        ","Joey          Student         ","Missing Picture ID                        "
000000754200,0000007542,00,"Joint          ","Toby          Smith           ","Missing Picture ID                        "
000000755900,0000007559,00,"Primary        ","Colette       Henderson       ","Missing Picture ID                        "
000000756700,0000007567,00,"Primary        ","Outback Fitters               ","Missing Picture ID (Business)             "
000000757500,0000007575,00,"Primary        ","Brandon       Ball            ","Missing Picture ID (Business)             "
000000758300,0000007583,00,"Primary        ","GRETCHEN L    MOORE           ","Missing Picture ID                        "
000000760900,0000007609,00,"Primary        ","George        Jetson          ","Missing Picture ID                        "
000001234467,0000012344,67,"Joint          ","CAROL A       RISEN           ","Missing Picture ID                        "
000254888180,0002548881,80,"Joint          ","Jenny         Cook            ","Missing Picture ID                        "
000667700981,0006677009,81,"Joint          ","Rachel        Westinghouse    ","Missing Picture ID                        "
000667700982,0006677009,82,"Joint          ","Rachel        Westinghouse    ","Missing Picture ID                        "
000701701580,0007017015,80,"Joint          ","Jori          Warner          ","Missing Picture ID                        "
```

Figure 8

Example of expired Picture ID extract. (picid.txt in Download folder - csv format)

```
000000610681,0000006106,81,"Joint          ","MARTHA S      MILLER          ","Expired ID: 08-03-2010                    "
000000623980,0000006239,80,"Joint          ","ELI M         ANDERSON        ","Expired ID: 01-03-2014                    "
000026633880,0000266338,80,"Joint          ","Maggie        Pond            ","Expired ID: 02-01-2014                    "
```

Figure 9

Direct VIEW Scanning

For In-House users (non-Terminal Server users), VIEW now supports scanning Pictures ID's directly from the Name Information window. This eliminates the need for third party scanner software and eliminates using the C:\Datamatic folder. This scans the Picture ID directly into VIEW.

The new scanner capability also offers the option to use a smaller scanner which does not take up much desk space. This might be a good alternative for credit unions that want each workstation to have a scanner to use. The smaller scanners can only be used to scan ID's only.

Datamatic also supports Scanshell 800N (smaller scanner mentioned above), in addition to HP scanners. The scanner must support TWAIN. The new feature will not work on Terminal Server or Citrix because these do not support USB ports. The scanner must be added locally to the PC. **Note:** Windows 7 PC's require a Scanshell 800NR because the Scanshell 800N will not work.

Note: First try loading the driver and software that is included with the scanner that is purchased. Next, the scanner needs to be selected on the Station Setup window (General tab).

Credit Union will add Scanner to the PC. A message box will display if the driver for the Scanner was not signed by the Scanner software company. The message may be "The software you are installing for this hardware: CSSN-SCANSHELL 800N has not passed Windows Logo testing to verify its compatibility with Windows XP." Credit Union needs to select "Continue Anyway".

Once Scanner is installed, go to [Main Ribbon > About VIEW > Edit button > General tab > Scanner]. Select the scanner from the drop down box. Afterwards, About VIEW will show the scanner next to the Scanner field under Station Information.

How to use: Select Member – Name Information. **One time only – first time:** The user will select the Import or Scan icon then this window will appear:

Calibration Page

For best image quality, this dialog appears when you press the Calibrate button or before scanning if the scanner has never been calibrated.

Please insert the black and white calibration paper face down into the scanner then press Calibrate.

Cancel   Calibrate
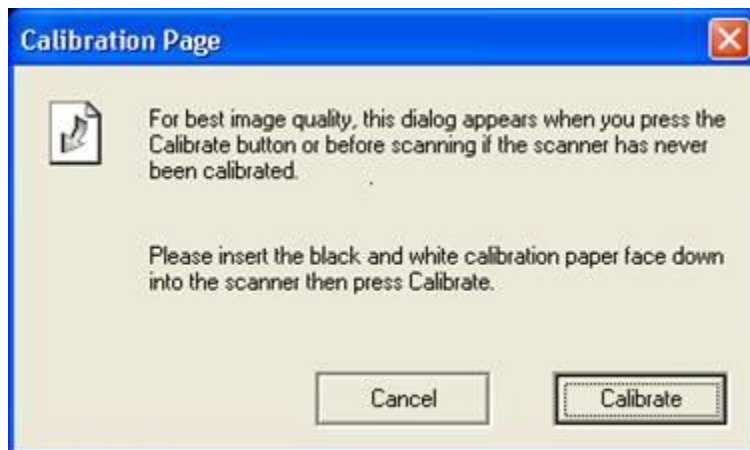
Figure 10

The credit union should have a **Calibration Paper** that came with scanner. Read the directions on the screen and then select Calibrate. If the Calibration was successful, a message will be displayed stating this.

The Scanner software (Not VIEW) will then prompt the user to insert the item to be scanned.
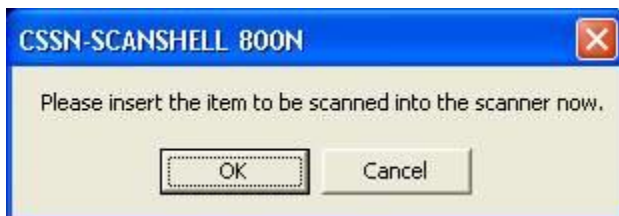

Figure 11

Next insert the item and select OK. The Scanner Software will then display the following:
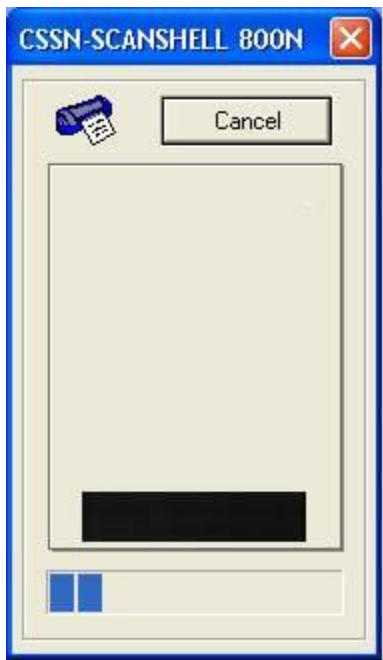
Once completed, it will return to VIEW. Finish importing or scanning the Picture ID and it is added successfully.

Figure 12

**Note: If "cancel" is selected when this window is displayed, the system will display the Name Information window. Select the Import icon and the items in the C:\Datamatic folder will be displayed to select the .jpg file. This is the original method of adding picture ID's to VIEW.

Figure 13

Contact Customer Support at 1-800-825-3854 for more information on this feature.

10   Picture ID

Scanning Software

A scanning software option has been made available for credit unions using Terminal Server/Citrix, as well as, Online credit unions. ****Note:** First try loading the driver and software that is included with the scanner that is purchased.

If this doesn't work, the software can be downloaded from the Datamatic web site (Scan Picture ID Utility). The software has its own installer just like VIEW and creates a shortcut on the desktop called "Scan Picture ID". This can be used instead of software from the scanner and can be used with both HP and scanshell scanners, if desired.

After double clicking the "Scan Picture ID" icon on the desktop, the user will be prompted to insert the Picture ID into the scanner. The system displays.
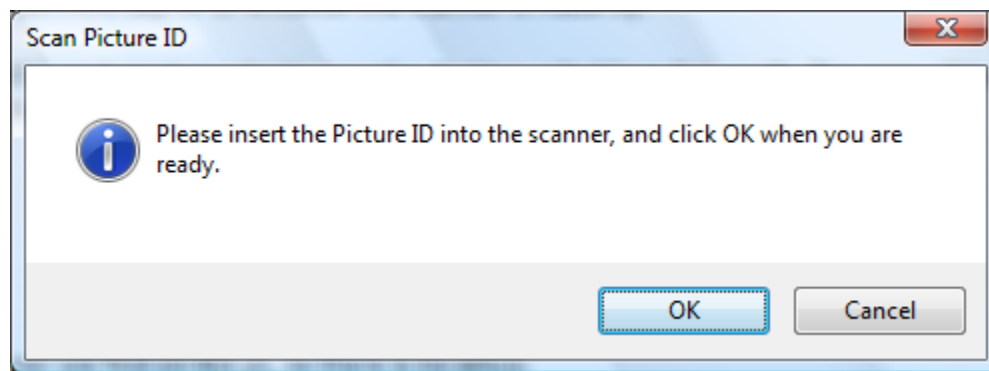

Figure 14

Requirements and other information:
- Microsoft .NET Framework 2.0 must be installed (optional component from Windows Update).
- The software uses C:Datamatic (picture_id.jpg) for the output of the scan.
- Contact Customer Support to use a different destination folder, if desired.
- All settings are automatic so no need to tweak a third-party software.
- VIEW uses the first scanner found on the PC, so there is no setup.

After the picture ID has been scanned, the picture ID can be imported into the member record in VIEW using the Name Information window. The options for Picture ID are in the ribbon.