

Imaging Setup

The Imaging Setup selection is used to set the pathway to the member files on the Windows Server where the documents are stored, as well as, for transaction receipt imaging. The Transaction Receipt Imaging stores a PDF version of the Credit Union's copy of the receipt. This feature is especially helpful for Credit Unions who use Integrated Teller machines where the member does not sign the Credit Union's copy of the receipt. The **Receipt CU Copy** option on Station Setup also needs to be set appropriately.

Document Imaging and Transaction Receipt Imaging are Optional Software packages that are included with the Picture ID Optional Software package or that can be purchased separately.

Any type of document can be scanned using a Document Scanner and the optional software allows the documents to be displayed in VIEW for the member. Also, any type of scanner can be used but the Cannon Scanners come with a basic software package for scanning and saving the files as multiple page PDF's (think of an advanced version of the HP desktop director). Check the specific make and model to see if multiple page .pdf file type is available. If a multiple page document is not an option, remember each page will become a separate document. Images saved as .pdf file type are best because of the smaller file size. Images saved as a .jpg for example are quite large in size.

Figure 1

Documents Path:* - This is for credit unions licensed for document retrieval. Enter the location for the document images. Example: [\\server\images](#)

Receipts Path:* - This is for credit unions using transaction receipt imaging. Enter the location for the transaction receipt images.

Receipt Folder Layout: - If using transaction receipt imaging, select the appropriate Receipt Folder Layout. The options are:

- **Subfolders by Year/Month/Day** - Imaged receipts stored in nested Subfolders by Year/Month/Day.
- **Watched** - Images stored in a specific “watched” folder, where the imaging system can import the receipt.

Electronic Signature Transactions: - Select which transactions will require an electronic signature. All cash withdrawal transactions are required by default.

- Account Closeouts
- Cash Back
- Check Issues
- Money Order/Travelers Checks
- Transfers

Select Save, to save the information entered.

Contact Alan Ross at aross@datamatic.net for more information on the Document Imaging Optional Software package or Transaction Receipt Imaging.

There are a couple different options for credit unions considering using Document Imaging.

Requirements for first option:

- Windows Server required. Folders must be setup on the Windows Server with the Account Base and Check Digit for the member numbers. **See Figure 2.
- This is included with the Picture ID (Optional Software Package) or can be purchased separately.
- Scanner(s) must be purchased. Use the software that comes with the scanner to scan the documents. The best file type for viewing is a .pdf.
- VIEW must be loaded on the PC.

Things to consider when deciding which option to go with.

1. Are you OK with scanning paper documents that are manually signed?
2. Are you OK with storing the documents on your own Windows Server?
3. Are you OK with the mechanics of using the scanner software and saving them on the Windows Server (works just like any windows application when you save to the network)?
4. Are you OK with controlling access to the documents via Windows Security?

If yes, then the first option will work for you.

The second option is to buy a “real imaging system” and scan documents into that. The information is stored and retrieved totally independent from VIEW; therefore, Datamatic does not have anything to do with it. This option is more complex and expensive depending on how the credit union wants it to work. The main thing here is that management needs to clearly define what the credit union wants to accomplish with the Document Imaging, and what it can afford, before starting this.

Here is an example of the folders on the Windows Server which will store the scanned documents. Each paper document needs to be scanned and stored in the appropriate member number folder on the Windows Server.

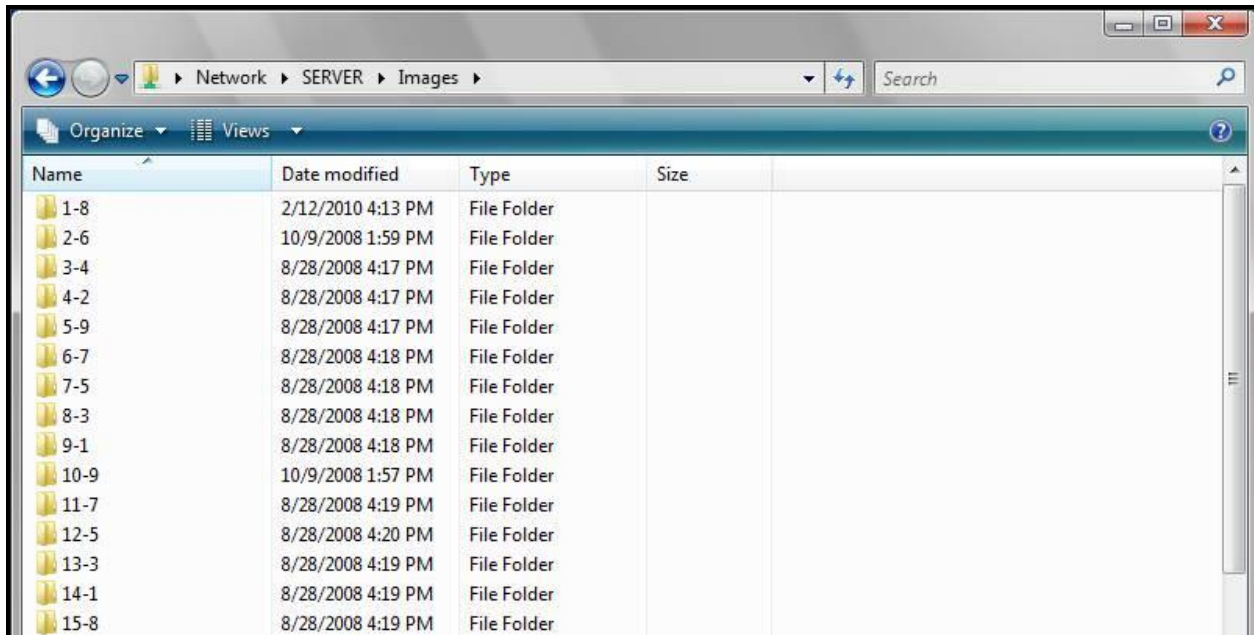


Figure 2

Example of the folder for member number 32-3.

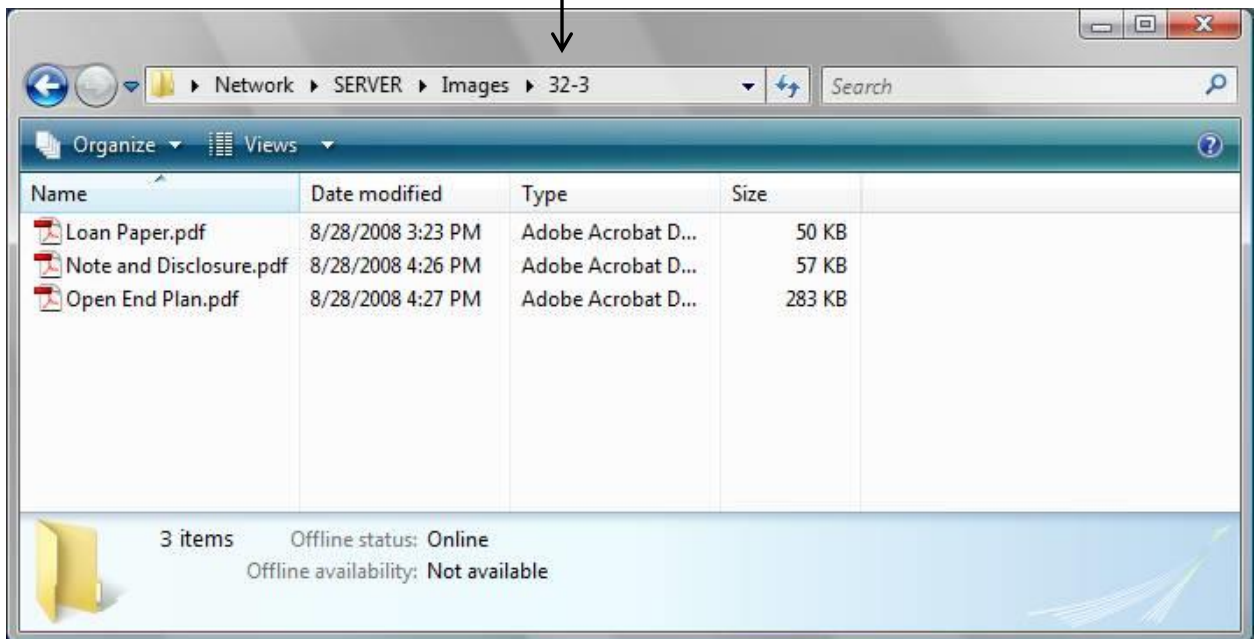


Figure 3

Example of the “Document Images” icon in VIEW. Double click on the “Document Images” icon to display the documents that have been scanned for the member. **See Figure 4.

Suffix Description	Balance	Available	Delinquent	Line of Credit	Limit	Ownership	Last Activity	Payment	Maturity	Club Type	Next Payment	Holds	Transfer	T
00 Regular Shares (\$3,816.15)	\$3,816.15	\$3,801.15	(none)	(none)	(none)	Joint Owner	05-01-15	(none)	(none)	Share	(none)	(none)	(none)	(r
06 Install/Rev 5.25% (\$231.35)	\$2,710.56	(none)	\$0.00	(none)	(none)	Co-Maker	05-03-15	\$231.35	09-03-16	(none)	06-03-15	(none)	\$231.35	Tr
07 Install/Rev 5.35% (\$243.74)	\$3,988.64	(none)	\$0.00	(none)	(none)	Individual	05-06-15	\$243.74	10-06-16	(none)	06-06-15	(none)	\$243.74	Tr
45 Secondary Shares	\$10,332.27	\$2,332.27	(none)	(none)	(none)	Individual	05-06-15	(none)	(none)	Share	(none)	\$8,000.00	(none)	(r
70 Draft Suffix (\$970.39)	\$970.39	\$970.39	(none)	(none)	(none)	Joint Owner	05-01-15	(none)	(none)	Share	(none)	(none)	(none)	(r
75 Overdraft Protection 8.50%	\$0.00	\$800.00	\$0.00	\$800.00	\$800.00	Individual	04-19-14	\$25.00	(none)	(none)	(none)	(none)	\$25.00	Tr
81 CD 0.95% (6 Months)	\$3,508.20	\$3,508.20	(none)	(none)	(none)	Joint Owner	(none)	(none)	(none)	CD	(none)	(none)	(none)	(r
98 HSA Share (\$2,599.06)	\$2,599.06	\$2,599.06	(none)	(none)	(none)	Individual	04-30-15	(none)	(none)	HSA Family	(none)	(none)	(none)	(r
2222-2200-0000-0001														

Figure 4

After creating the folder for the member on the server, at least one document must be added in order for VIEW to display **Document Images** on the Member Summary window. See Figure 4. VIEW does not recognize a subfolder only.

Compare this example to Figure 3.

Figure 5

Anything that is put in the folder in windows will show up in VIEW. Either highlight the document to be viewed and press enter or double click on the document to open the document to be displayed.

In order to print the documents (if needed) from the Document Images folder under the member in VIEW, a printer selection must be made on the General Tab on the Station Setup window for the employee. This is located under Help on the Menu Bar **then** select About VIEW **then** select the Edit button.