Photo Collection and Signature Capture Guide

Data Collection · https://www.codereadr.com/knowledgebase/photo-collection-and-signature-capture/

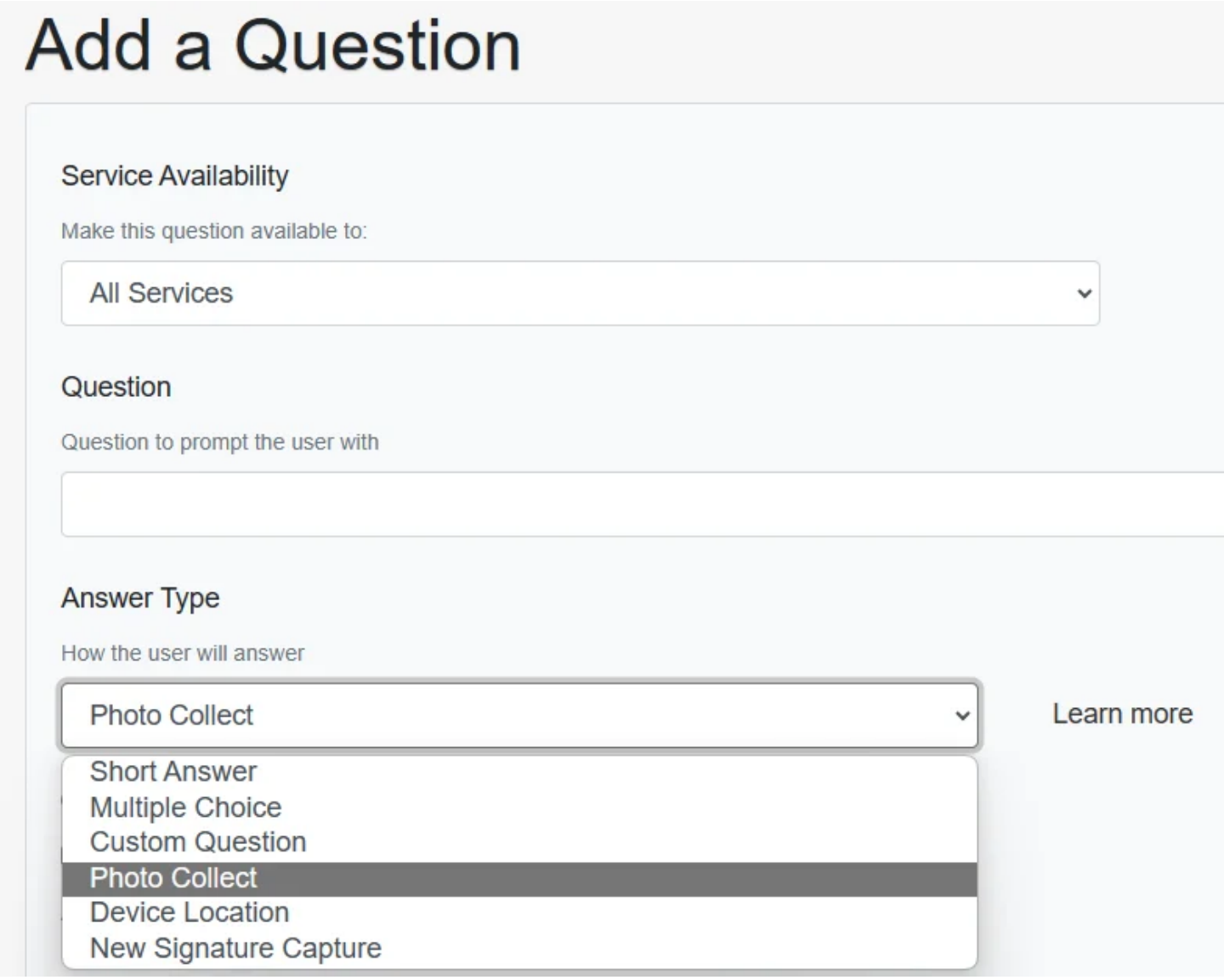
Video Tutorial: How to Collect Photos & Custom Questions

For a quick overview, watch this tutorial on collecting photos and custom questions.



How to Collect Photos with CodeREADr

Learn how to streamline photo collection and manage captured signatures with this step-by-step guide.



1. Set Up Your Photo Collection Question
    - Select the answer type: Photo Collect.
    - Label the question clearly for app users.
    - Decide if this question applies to all services or specific ones.

2. Choose a Hosting Medium
    - Select a host from the dropdown menu
    - You can select a custom upload path but minimally you need to enter the forward slash symbol (/)
    - For visibility in the CodeREADr Scans dashboard, enable Public Link by selecting "Yes."

Medium Details

Medium Type Please select

- Please select
- Dropbox
- FTP
- Google Drive
- S3
- SFTP

File Details

Upload Path

Auto-generate filename? ◉Yes ○No

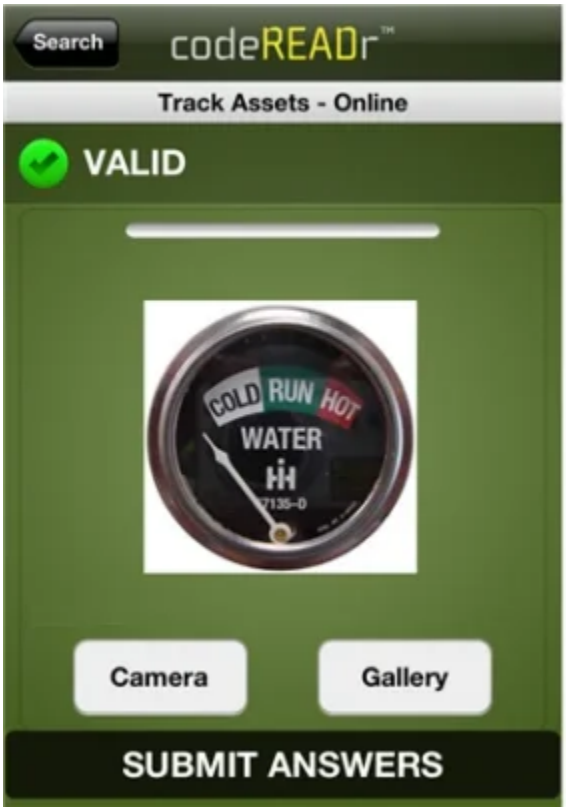
Prefix

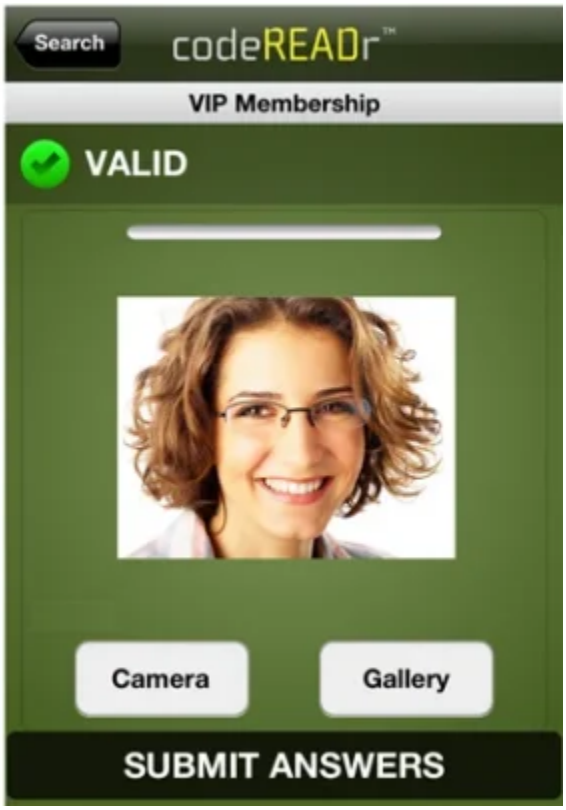
Suffix

Image width or height cannot exceed: 960

Compress image size when possible. 0 (smallest size) and 100 (best quality) 65

Collect public link? Anyone with the link can view this file. ○ Yes ○ No





Notes on Photo Capturing

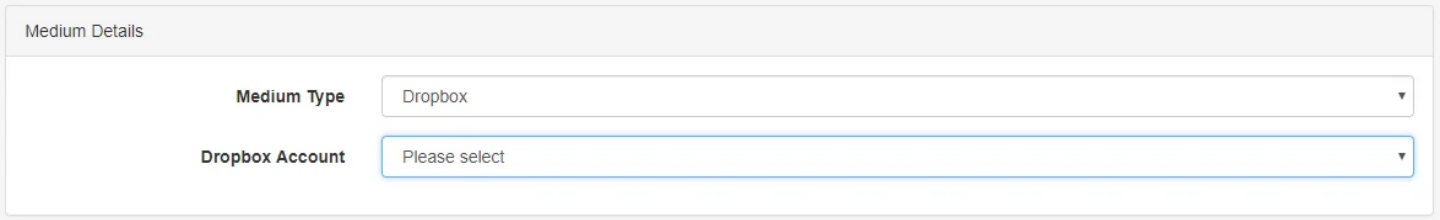
- Non-Barcode Initiated Records:
  - Records can be created without scanning barcodes. Use the Manual entry, or the Lookup option to find the desired ID or object quickly.
- Uploading Edited Photos:
  - Take photos with the app in the background, edit them, and save them to the gallery. Select the edited photo during scanning for inclusion in the scan record.
- Connectivity Requirements:
  - Online Services: Photos cannot be captured offline. Scanning continues, but photo uploads must wait for restored connectivity.
  - Offline Services: Photos are stored locally with a temporary ID. Once connected, tap Upload Scans to sync.

Integration with FTP

1. Setup Instructions:
   - Request FTP account details from your IT department.
   - Add or edit FTP accounts via the External Accounts section on your Account page.
2. Barcode Value Inclusion:
   - Follow instructions in the Include Barcode Value section.

Note: Ensure any new FTP setup aligns with your organization's security protocols.

Integration with Dropbox



1. Account Linking:

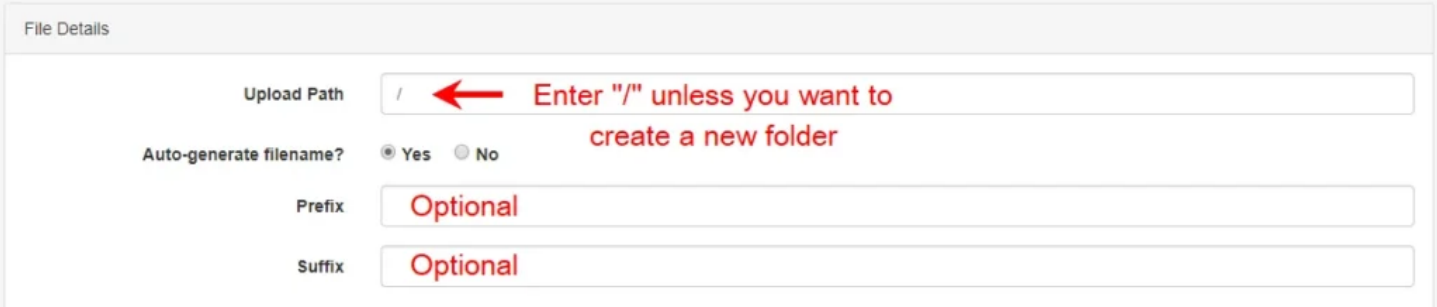
- Use your existing Dropbox account (Free or Paid).
- Link a new account if needed by signing in through CodeREADr.

2. Upload Path Configuration:
   - Enter / to upload photos to the /Apps/CodeREADr folder.
   - Create sub-folders (e.g., /employee_photos/) and use exact matching paths.

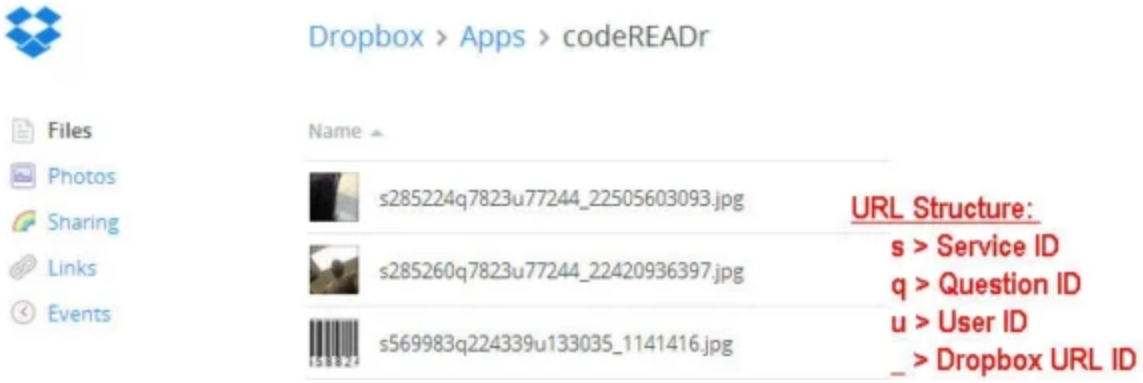
3. File Naming:
   - Avoid spaces; use underscores (e.g., /client_photos/).
   - For advanced use, add prefixes like client_name_ or service_name_ for sorting.

4. Optimize Image Sizes:
   - Test different pixel sizes to balance file size and sync speed.
   - Default settings:
     - Image Size: 960 pixels
     - Compression: 65%

5. Shared Links:
   - Enable Collect Link to create clickable links for photos in scan records.
   - Disable for private uploads.



Advanced Features for Photo Collection & Signature Capture



Include Barcode Value

- Add __SCAN_VALUE__ in the prefix/suffix field or disable auto-generated filenames and input __SCAN_VALUE__.

Auto-Add Photos to Validation Databases

- Link captured photos to barcodes for future verification.
- Use the Webify feature to include external images in your database.

Photo Management in Dropbox

- Photos appear as shareable links in scan records.
- Admins can review photos via the Scans page or exported files.

Best Practices for Photo Collection and Signature Capture

- Secure Photos: For sensitive data, ensure limited permissions and secure links.
- Testing: Always test paths, file sizes, and compression settings for optimal performance.
- Support: Contact support@codereadr.com for advanced configurations or security needs.

This guide ensures you’re equipped to collect, upload, and manage photos seamlessly with CodeREADr while keeping your workflow efficient and secure.