Compass Capture

3.61

USER MANUAL

January 2010

About Northwoods Consulting Partners

Northwoods Consulting Partners, Inc., founded in 1997, is a privately-held software development and services company headquartered in Dublin, Ohio. Our Compass Software® product suite is created solely to serve the needs of human services agencies nationwide.

With proven technology, and a focus on industry knowledge and our clients, we create business solutions that provide proper application of products and services with tangible and measurable results.

Copyright and Trademarks Notice

Disclaimer

Northwoods Consulting Partners has made reasonable effort to ensure the accuracy of this manual. Information in this document is subject to change. If you should discover any discrepancies, please notify us immediately.

Contact Information

Northwoods Consulting Partners

Address:
5815 Wall Street
Dublin, Ohio 43017

Phone:
(614) 781-7800

Web:
http://www.teamnorthwoods.com

Northwoods Support Center

Phone:
(614) 545-0999

Email:
help@teamnorthwoods.com

TABLE OF CONTENTS

COMPASS CAPTURE INTRODUCTION

Compass Capture is distributed scanning software that allows agencies to scan and return documents at the point of contact with the client. Caseworkers at the front desk, for example, can "capture" and immediately return document drop-offs, saving postage and other costs. The documents are automatically routed electronically to the appropriate caseworker for their use within seconds of scanning.

Documents scanned in Capture can also quickly and easily be retrieved from the Document Management System (DMS).

Launching Capture

To launch Capture, click on the **Capture** icon from your desktop (Fig. 7.1).

Fig. 7.1 Capture Navigation Button

The main Capture window opens (Fig. 7.2).

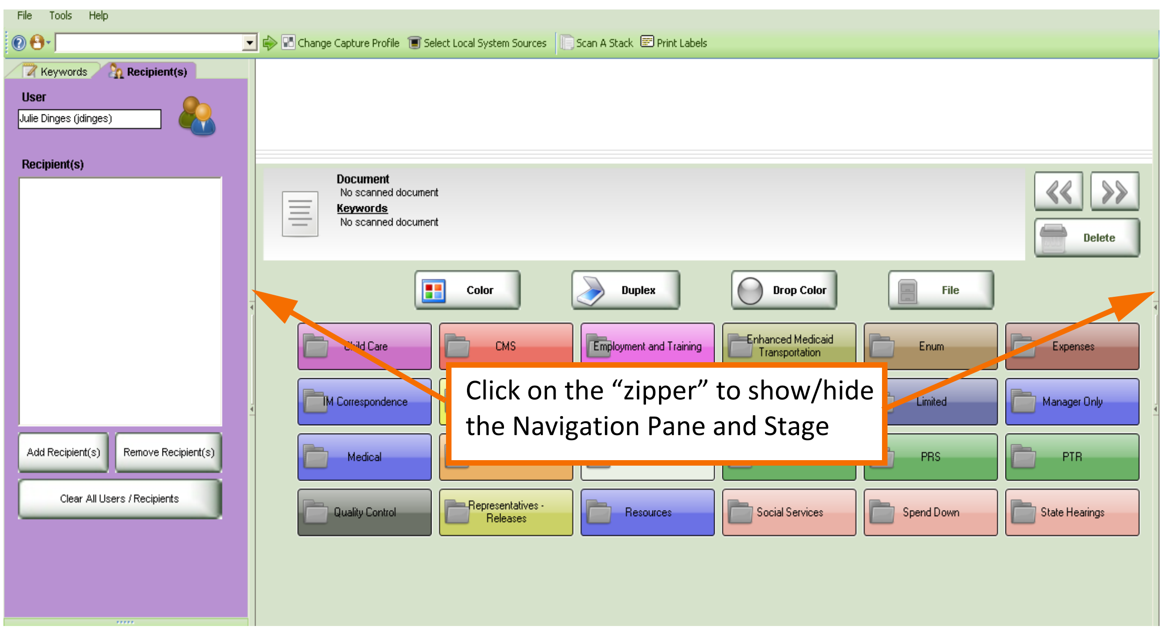

Fig. 7.2 Capture interface

Selecting Caseworker Data

Make sure you are using the correct profile.

To select a different Profile:

1. Click the **Change Capture Profile** button in the Toolbar (Fig. 7.3).

Fig. 7.3 Change Capture Profile

2. The **Select a Profile** window opens. Select the profile you want from the list displayed. In this example, we chose the **Reception Profile** (Fig. 7.4).

Fig. 7.4 Reception Profile

To select a user:

1. Click on the **Recipient(s)** tab.
2. Click on the **Select User** icon to the right of the **User** field (Fig. 7.5).

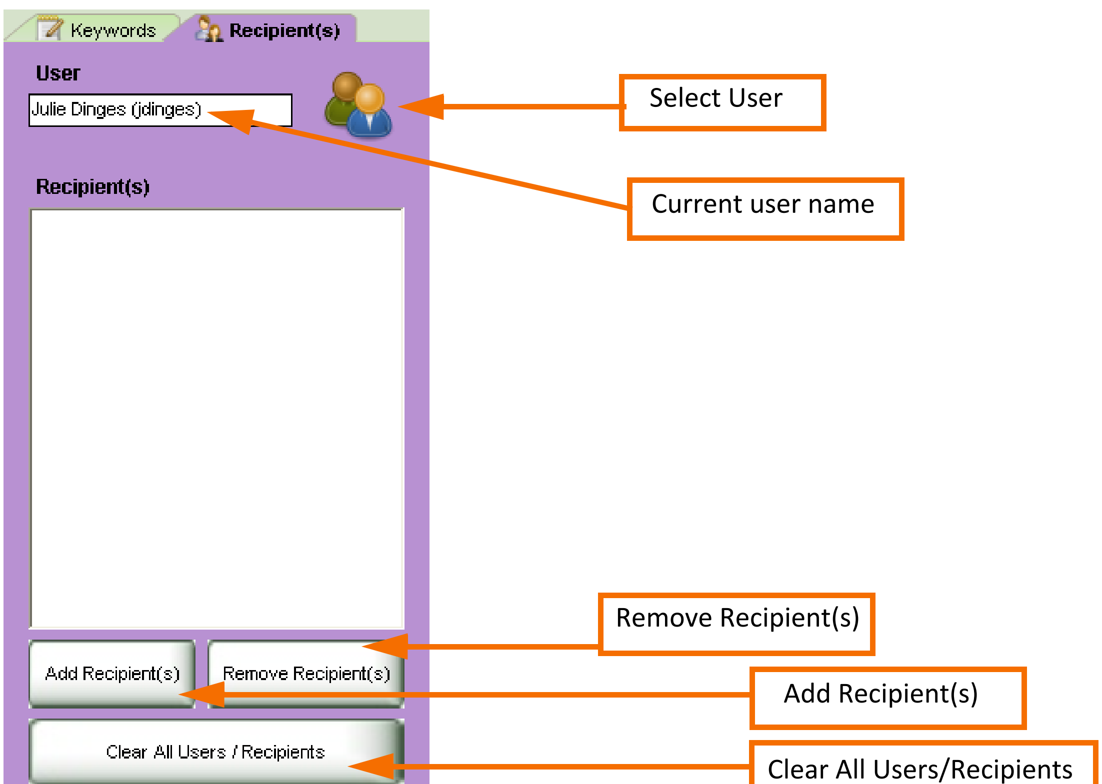

Fig. 7.5 Recipients tab

3. Select a username from the list displayed. (Click **More** to see additional names.)

4. Click the **Add Recipient(s)** button and choose the recipient(s) from the list displayed, or click the **Remove Recipient(s)** button to remove a recipient from your selected recipients (See Fig 7.5).

Multiple recipients can also be selected.

Locating Clients and Cases

Before scanning a document, you must populate the **Keywords** fields. To search for a client or case using the magnifying glass (searching on a single keyword entry):

1. Click the **Keywords** tab in the Search Criteria area.
2. Enter one type of known client data in a text box, for example, **SSN**, **Case**, **Last Name** or **First Name**) (Fig. 7.6).

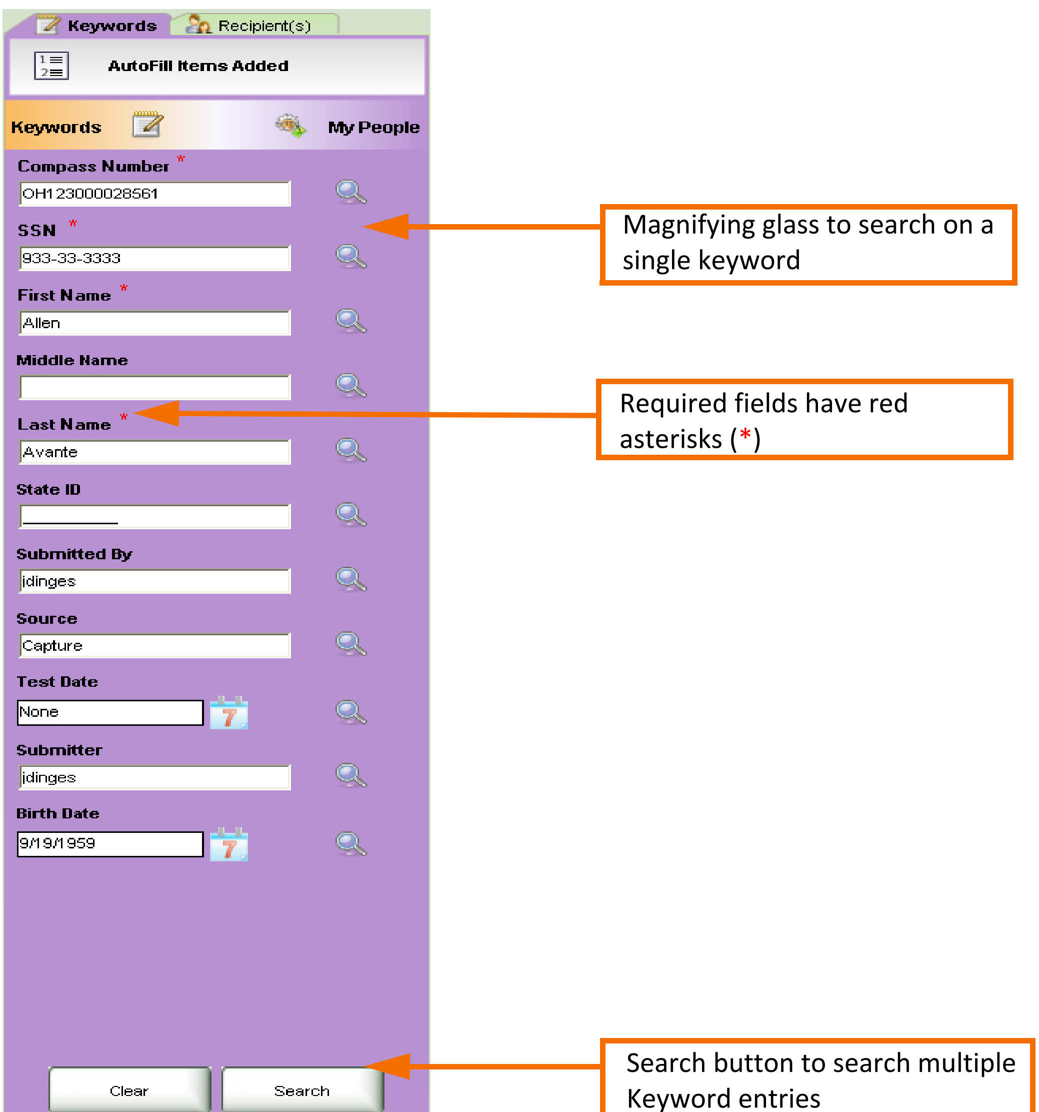

Fig. 7.6 Keywords tab

3. Click the **Magnifying Glass** icon next to your field entry. A selection grid opens.

If no matches are found, you must enter the client into the DMS before scanning.

4. Choose the correct client data match by single-clicking the entry to highlight it.
5. To scan a document for multiple clients, select all of the rows you need while in the grid window.
6. Click **OK**.

To clear the keywords, scroll down in the Keywords area and click **Clear Keywords**.

Locating Clients and Cases Using the Search Button

Before scanning a document, you must populate the Keywords fields.

You can use the **Search** button to search for a client or case. The **Search** button performs a "search all" on all the keyword values entered in the Keywords tab.

Certain keywords, such as Source and Submitted By, for example, that may be pre-populated can be configured to be excluded from a Search button search. Including these values in the search may result in an error where no searches can be performed. See your System Administrator for assistance.

To search for a client or case using the Search button (searching on multiple keyword entries):

1. Click the **Keywords** tab in the Search Criteria area.
2. Enter several types of known client data in the appropriate text entry boxes (e.g., **SSN**, **Compass Number**, **Last Name** or **First Name**) (See Fig. 7.6).
3. Click the **Search** button (See Fig. 7.6). A selection grid window opens.

If no matches are found, you must enter the client into the DMS before scanning.

4. Choose the correct client data match by single-clicking the entry to highlight it.
5. To scan a document for multiple clients, select all of the rows you want to include while in the selection grid window.
6. Click **OK**. The keywords entry boxes are populated.

To clear the keywords, click the **Clear** button at the bottom of the Keywords tab.

Scanning a Document

1. Insert the document you want to scan into the scanner. Make sure your document(s) is upside-down and backward.
2. Select the appropriate scan options (Fig. 7.7):
   - **Color** scans documents in color. It is suggested that the following document types be scanned in color for quality purposes:
     - Colored documents (such as a driver's license)
     - Low-quality black and white documents
     - Documents that have highlighting (except yellow)
     - Documents with low or high quality photographs

Depending on what Northwoods or your System Administrator has configured, the Color button may or may not reset once you've scanned. If it resets, you will need to select the Color option again.

   - **Duplex** will scan both sides of the document and automatically drop blank pages.
   - **Drop Color** will remove a specified color from black and white documents. For example, selecting **Drop Color** (red) will remove any red, or red-like, marks on the black and white document. Colors you can drop include:
     - Red
     - Blue
     - Green
     - Yellow

3. Click the appropriate **Document Type Group** button.

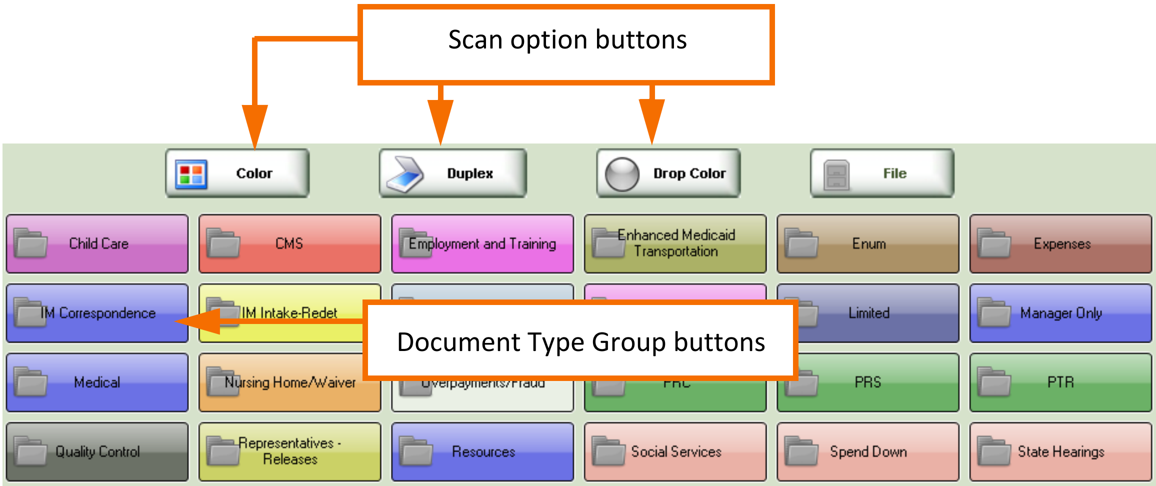

Fig. 7.7 Scan options and Document Type Group buttons

4. From the sub-menu, click the appropriate Document Type button. This "triggers" the scanner to begin scanning (Fig. 7.8).

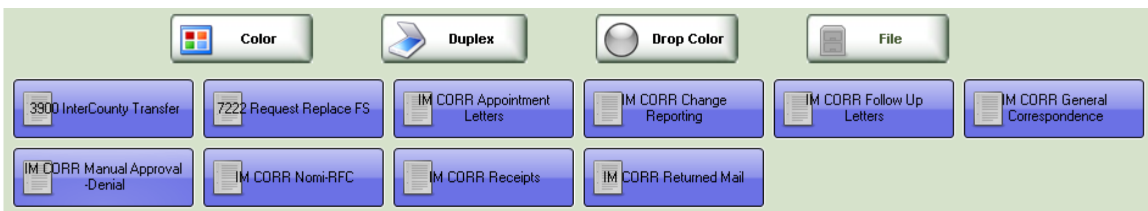

Fig. 7.8 Document Type buttons

The scanned document preview appears briefly, then an icon displays in the **Documents** panel with basic scan details below it (Fig. 7.9), including:

- Document Type
- Number of pages
- Scanning resolution
- Whether the document was scanned as color or black and white
- Whether the document was scanned as single-sided or duplex
- Keywords for the client

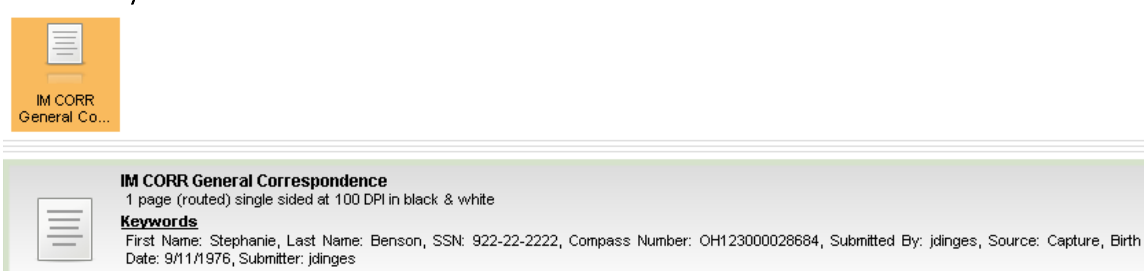

Fig. 7.9 Scanned image icon with details

Repeat the steps above to scan additional documents.

Check to see if the user/recipient and client information are correct before scanning.

5. To submit, see **Submitting Documents to the DMS**.

Canceling a Scan

You can cancel a scan while a document is being scanned. When the scan begins, a **Cancel Scan** button appears in the Toolbar (Fig. 7.10).

Fig. 7.10 Cancel Scan

When you click the button, the scan is stopped. If you were scanning a multi-page document, the scanner may scan a page or two before it actually stops.

If you do not see the Cancel Scan button, the document previews may be hiding it. Move the preview to see the button.

Scanning a Document with a Barcode (Stack Scanning)

Stack Scanning allows you to scan a document containing a barcode without inputting any information.

To scan a document containing a barcode:

1. Load the document containing the barcode into the scanner and click **Scan A Stack** (Fig. 7.11).
2. The document scans automatically, displaying the Keywords in the **Document Panel**.
3. Click **File** to submit the document to the DMS.

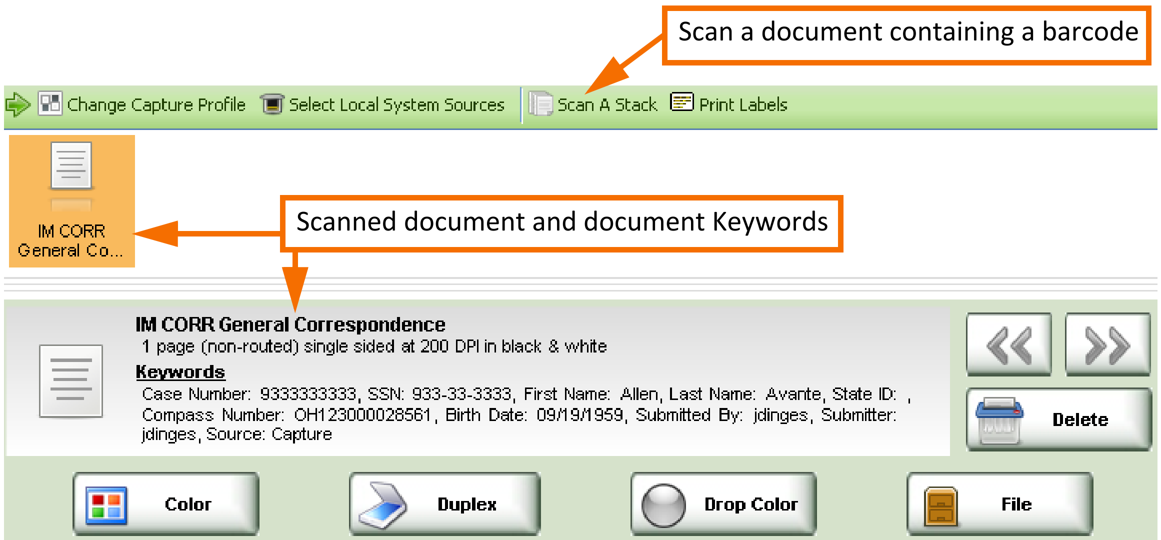

Fig. 7.11 Scan a Stack and Scanned Barcoded Document

4. The **Stack Scan Reconciliation** and **Document Information** windows open (Fig.7.12). Verify or change the Document Type.
5. Verify, change, or add keywords.
6. Click **Save** and **Close** in the **Document Information** window.
7. Click **Save Changes and File** in the **Stack Scan Reconciliation** window.

Fig. 7.12 Stack Scan Reconciliation and Document Information windows

8. *Optional* - Print a receipt for this transaction.

   The document is submitted to the DMS.

Deleting a Scanned Image

To delete a scanned image:

1. Click on a scanned document in the **Documents** panel.
2. Click the **Delete** button (paper shredder icon) (Fig. 7.13).

Fig. 7.13 Delete button

3. Respond to the resulting Delete Confirmation dialog box (Fig 7.14).

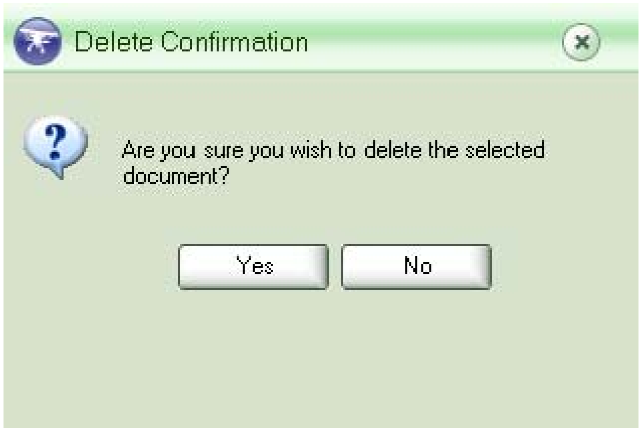

Fig. 7.14 Delete Confirmation

Previewing Scan Results

To preview a scanned image:

1. In the Documents panel use the arrow buttons to locate and highlight a document that you want to view.
2. If the Stage is not visible, click on the Zipper to unhide it.
3. Click on the selected scanned image icon to display it.

In the **Stage**, the **Image Viewer** displays:

- The first page of the selected scanned document (Fig. 7.15)
- Any subsequent pages as thumbnails

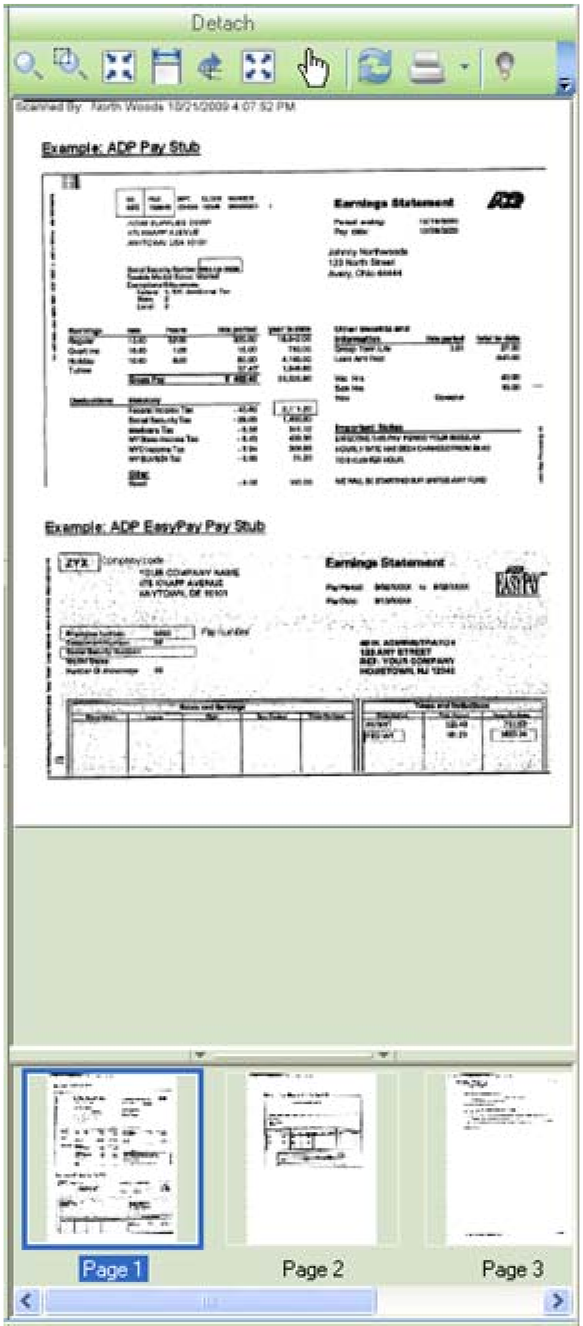

Fig. 7.15 Scanned image preview with Thumbnails

Making Adjustments to Scanned Images

1. *Optional* - Click the **Detach** bar above the **Image Viewer**. The **Image Viewer** panel detaches from the **Stage**. Scan data appears at the top of the page, for example, name of the person who scanned the document, date, and time.
2. *Optional* - Using your mouse, drag the detached panel where you want it on the screen (Fig. 7.16).

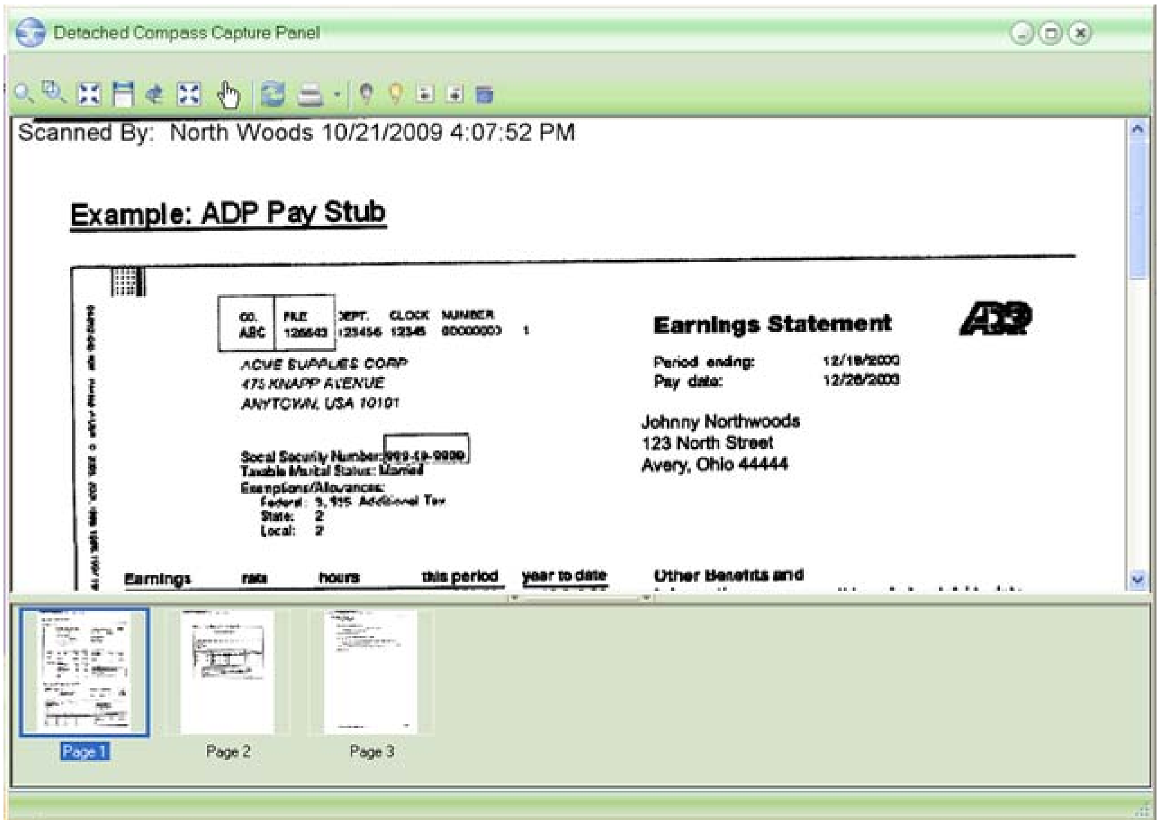

Fig. 7.16 Scanned image preview in the Image Viewer in the Detached Compass Capture Panel

3. Make the appropriate changes to the document.

The Image Viewer menu buttons and their functions, from left to right, include (Fig. 7.17):

- Magnifying Glass – Magnify the image with a floating magnifying glass
- Zoom To – Magnify parts of the image by drawing a box around the areas you want to enlarge
- Center at a Point – Centers the document at the point where you mouse is clicked
- Fit to Width – Fits the image to the width of the available window
- Rotate – Rotates or turns the image clockwise
- Fit – Resizes the image to fit inside of the available window
- Move Image (Pan) – Allows you to grab the image and move it up and down
- Reload – Refreshes the image
- Print – Prints the entire image or just the current view
- Darken Image – Makes the image darker
- Lighten Image – Makes the image lighter
- Insert a Page Before – Allows you to insert a page before the current image
- Insert a Page After – Allows you to insert a page after the current image
- Delete This Page – Deletes the current image

Fig. 7.17 Image Viewer options

4. Use the **Close Viewer** button (**X**) to close the **Image Viewer**.

SUBMITTING DOCUMENTS TO THE DMS

To submit your scanned documents to the DMS:

1. Click on the **File** button (Fig. 7.18).

Fig. 7.18 File button

The **Print** dialog box opens, prompting you to print a receipt.

2. Choose:
   - **Yes** – The scanned image is saved in the DMS and a receipt is printed on your local printer. The receipt is also saved in the DMS.
   - **No** – The scanned image is saved in the DMS but no receipt is printed.
   - **Cancel** – The scanned image is not saved in the DMS and no receipt is printed. You are returned to the main Capture window with the scanned documents still present.

The document is submitted to the DMS.

PRINTING LABELS

There are two options for printing labels.

1. Perform one of the following options to print a label:
   - From the Toolbar button.
     a. Populate the Keyword fields.
     b. Click on the **Print Labels** Toolbar button.
   - Depending on your agency configuration, after you click the **File** button to submit your scanned image(s), you may also be prompted to print a label for mailing purposes. If the scanned document is indexed to more than one client, a label is created for each client.

Address labels can be edited. Click in the field you want to edit and make your changes.

The Print Address Labels window opens (Fig. 7.19).

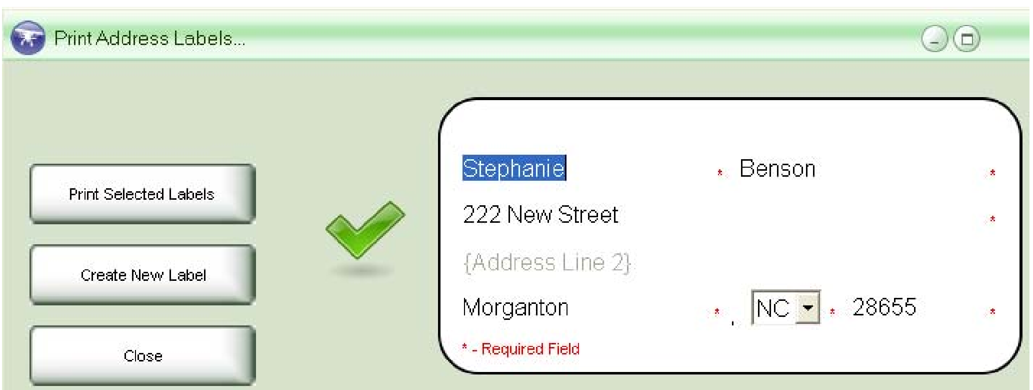

Fig. 7.19 Print Address Labels

2. Click one of the three buttons:
   - **Print Selected Labels** – select the specific label or labels you want to print
   - **Create New Label** – enter data to create a new label. New labels can be selected (marked with a green checkmark) or deselected (marked with a red X) (Fig. 7.20). To create a new label, click in the **Last Name** field, enter the client's last name, and click **Ctrl + S**. If there is more than one match, select the appropriate person from the grid.
   - **Close** – close the **Print Address Labels…** window.

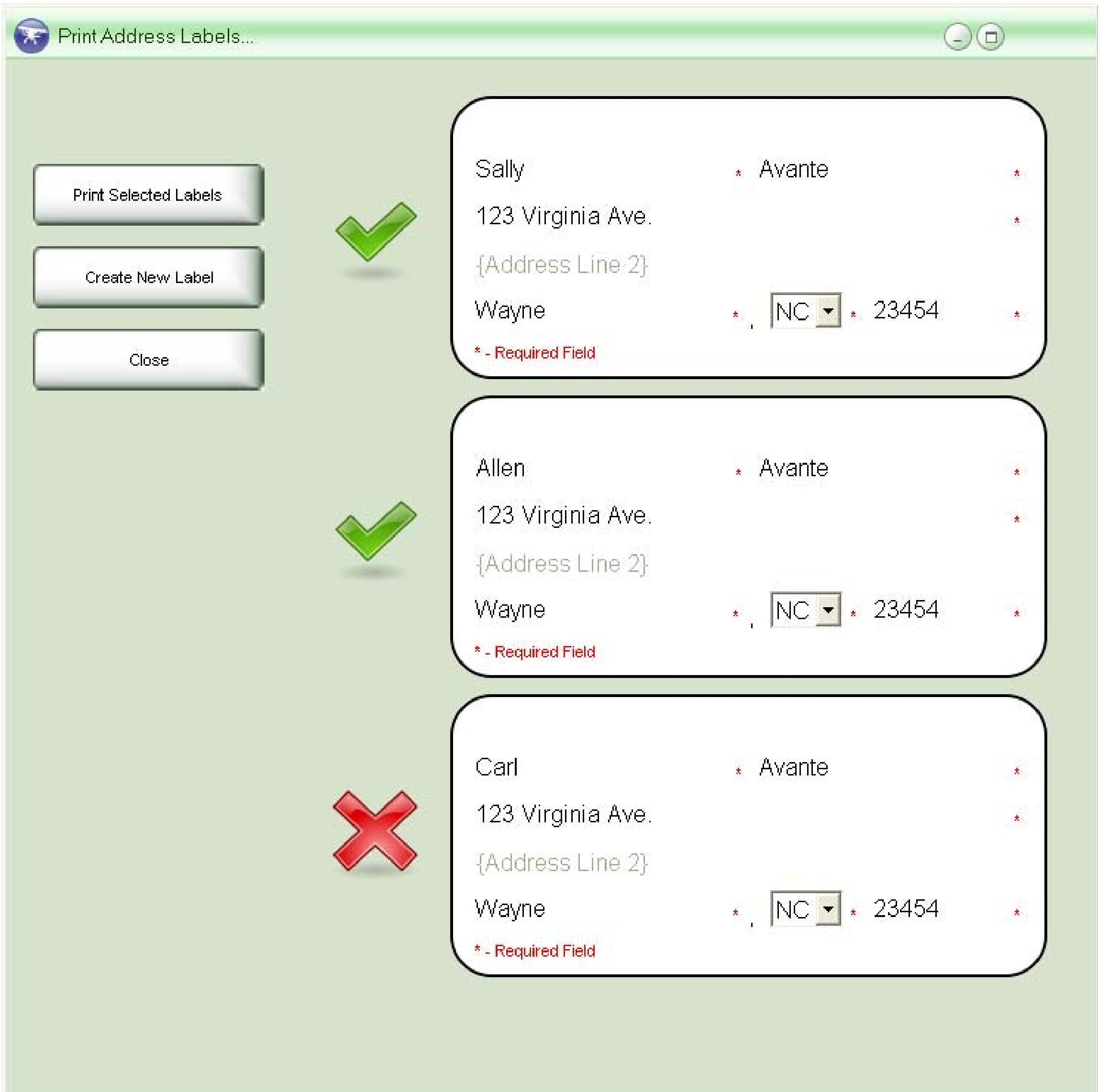

Fig. 7.20 Print Address Labels...