

# COMPASS CAPTURE 3.61

### **USER MANUAL**

January 2010



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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.

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### **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).

File Tools Help	
	💌 🏟 🗹 Change Capture Profile 👅 Select Local System Sources 🔲 Scan A Stack 🖾 Print Labels
Keywords A Recipient(s)	
User Julie Dinges (idinges)	
Recipient(s)	
	Document     No scanned document       Keywords     No scanned document
	Color Duplex Drop Color File
Add Recipient(s) Remove Recipient(s)	Click on the "zipper" to show/hide the Navigation Pane and Stage
Clear All Users / Recipients	Quality Control     Bepresentatives - Releases     Besources     Social Services     Spend Down     State Hearings

*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).

Change Capture Profile

#### 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).

Keywords 🦙 🦄 Recipient(s)	
User Julie Dinges (jdinges)	Select User
Recipient(s)	Current user name
	Remove Recipient(s)
Add Recipient(s) Remove Recipient(s)	Add Recipient(s)
Clear All Users / Recipients	Clear All Users/Recipients

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).

Color	Duplex	Drop Color	File	
3900 InterCounty Transfer 7222 Request Replace FS	CORR Appointment Letters	M CORR Change Reporting	M CORR Follow Up Letters	M CORR General Correspondence
IM CORR Manual Approval -Denial		CORR Returned Mail		

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



	IM CORR General Correspondence 1 page (routed) single sided at 100 DPI in black & white
=	Keywords First Name: Stephanie, Last Name: Benson, SSN: 922-22-2222, Compass Number: OH123000028684, Submitted By: jdinges, Source: Capture, Birth Date: 9/11/1976, Submitter: jdinges
700	

Fig. 7.9 Scanned image icon with details



Repeat the steps above to scan additional documents.

note

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 <b>File</b> to submit the document to the DMS.	

Scan a document co	ntaining a barcode
💠 配 Change Capture Profile 🏾 🗃 Select Local System Sources 🛛 📗 Scan A Stack 🔄 Print Labels	
M CORR General Co	
IM CORR General Correspondence 1 page (non-routed) single sided at 200 DPI in black & white Keywords Case Number: 9333333333, SSN: 933-33-3333, First Name: Allen, Last Name: Avante, State ID: , Compass Number: OH123000028561, Birth Date: 09/19/1959, Submitted By: jdinges, Submitter: jdinges, Source: Capture	Image: Constraint of the second secon
Color Duplex Duplex	File

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.

Stack Scan Reconciliation								
IM CORR General Correspondence							^	
	Document Inform	nation					-	
	Document Types	👔 Allen Avante	Add	Keywords		;	×	
	Compass Number	OH123000028561		SSN	933-33-3333			
	First Name	Allen	-	Middle Name				
	Last Name	Avante		State ID				
	Submitted By	idinges		Source	Capture			
	Test Date	01/01/1900	•	Submitter	jdinges			
	Birth Date	09/19/1959	•	Case Manager	3			
	Indexes must be selec	cted from autofill results. C	trl-S will per	rform a search.				
	🥅 Make Transparer	nt	Save	And Next	Save	Close		
							_ (	Resc
							V .	
						Thumbnail Size	Small	
		anal						_
Save Changes And File								
	,	Page 1						

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).

😡 Delete Co	onfirmation	×
Are yo docum	u sure you wish to delete the selected ent? Yes No	

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

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Example: ADP Pay Stub		
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Exemple: ADP EasyPay Pay	Stub	
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ANYTOWN, OF HEND	Participa Barrier	NA - PROVINCE AND
Carter Later	ILLANT I	TANKS CONTRACT
Netter Difference II	AD YOU HOURTON	A COMPANY MIL NJ 1254
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The 1 states 1	1 - Second	
And		
(DITCESE		
Page 1	Page 2	Page 3

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).

Scanned		th Wood	<u>∃ -   9 9</u> ds 10/21/20		52 PM			00	
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100/17	Earnings	rata	hours	this period	year to date	Other Benefits and			
	lane								
Page 1		Page 2	Page 3						

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.



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

Print Address Labels		9	
Print Selected Labels	Stephanie	∗ Benson	
Create New Label	222 New Street {Address Line 2}	20055	
Close	Morganton * - Required Field	* NC 🖌 * 28655	

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.

😿 Print Address Labels		G	
Print Selected Labels	Sally 123 Virginia Ave.	▲ Avante	*
Create New Label	{Address Line 2} Wayne * - Required Field	* NC 🕶 * 23454	
~	Allen 123 Virginia Ave. {Address Line 2}	▲ Avante	*
	(Address Line 2) Wayne * - Required Field	* , NC 🛨 * 23454	
×	Carl 123 Virginia Ave. {Address Line 2}	<ul> <li>Avante</li> </ul>	*
	Wayne * - Required Field	* , NC 🗙 * 23454	*

Fig. 7.20 Print Address Labels...