Documents
User Guide

A Guide for Forcura Users

+ forcura

Contents

Download the Forcura App
iOS (Apple Application Store)
Android (Google Play Store)

System Requirements

	iOS	Android
Size	15.9 MB	67 MB
Operating System	10.0 or later. iOS 11 preferred.	5.0 and up. 6.0.1 is preferred.
Compatibility	iPhone 6 or newer, 2016 iPad/iPad Pro or newer, iPod Touch compatibile	Samsung Galaxy Tab S or above, Galaxy S5 Phone and above with OS 5.0. Galaxy S7 Phone preferred
Camera Requirement Minimum	8 Megapixels	8 Mexapixels
Camera Requirement Recommended	10 Megapixels & Flash	10 Megapixels with autofocus & Flash

forcura

Setting up the Forcura Mobile App

App Setup
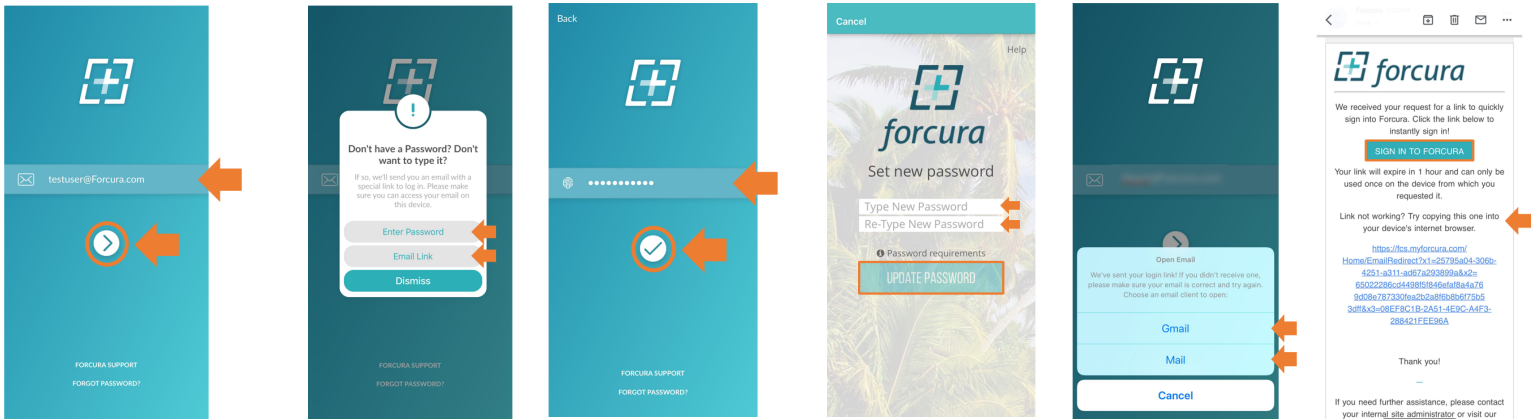
- Launch the app.

- Enter your Forcura username (email address), then tap the forward arrow to advance.

- A pop-up will appear asking whether you would like to 'Enter Password' or receive an 'Email Link' to log in.

- If entering a password, select the checkmark to advance.

    o Upon logging in for the first time, you may be prompted to set up a unique password.

    o The password requirements are as follows: must be between eight and sixteen characters and contain at least three of the following: one uppercase letter, one lowercase letter, one number, or one special character. After setting your unique password, you will be asked to enter it once more to login.

- If receiving an email link, you will be prompted to select an email app to launch in order to access the link.

    o Once in your inbox, open the email titled 'Sign in to Forcura' and click the teal 'SIGN IN TO FORCURA' button to be redirected to the Forcura app.

    o If your device is not opening the link correctly, you can copy the hyperlink in the email and paste it into an internet browser on your device (Safari, Chrome, Firefox, Puffin, etc.).

Pin/Touch Setup

- Once you have successfully logged in, you will be prompted to set up a numerical PIN or fingerprint/TouchID/FaceID to log into the app without entering your password each time.

- Note: To use the Fingerprint/TouchID feature, you will need to have iOS TouchID/FaceID or Android Fingerprint Scanner enabled on your device.
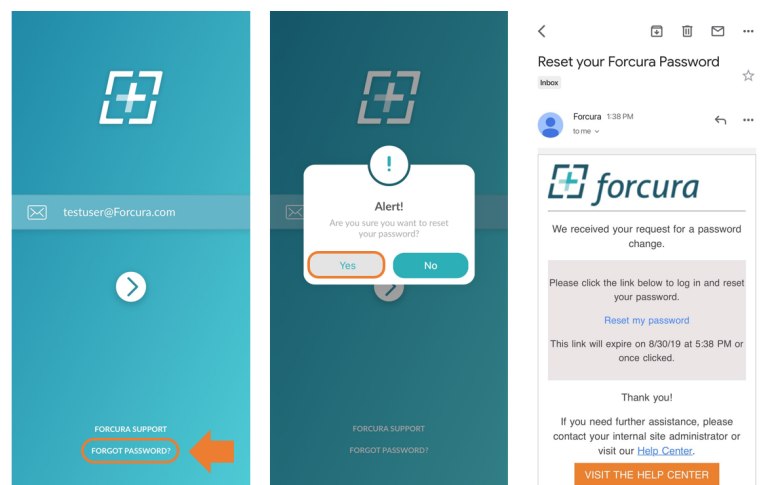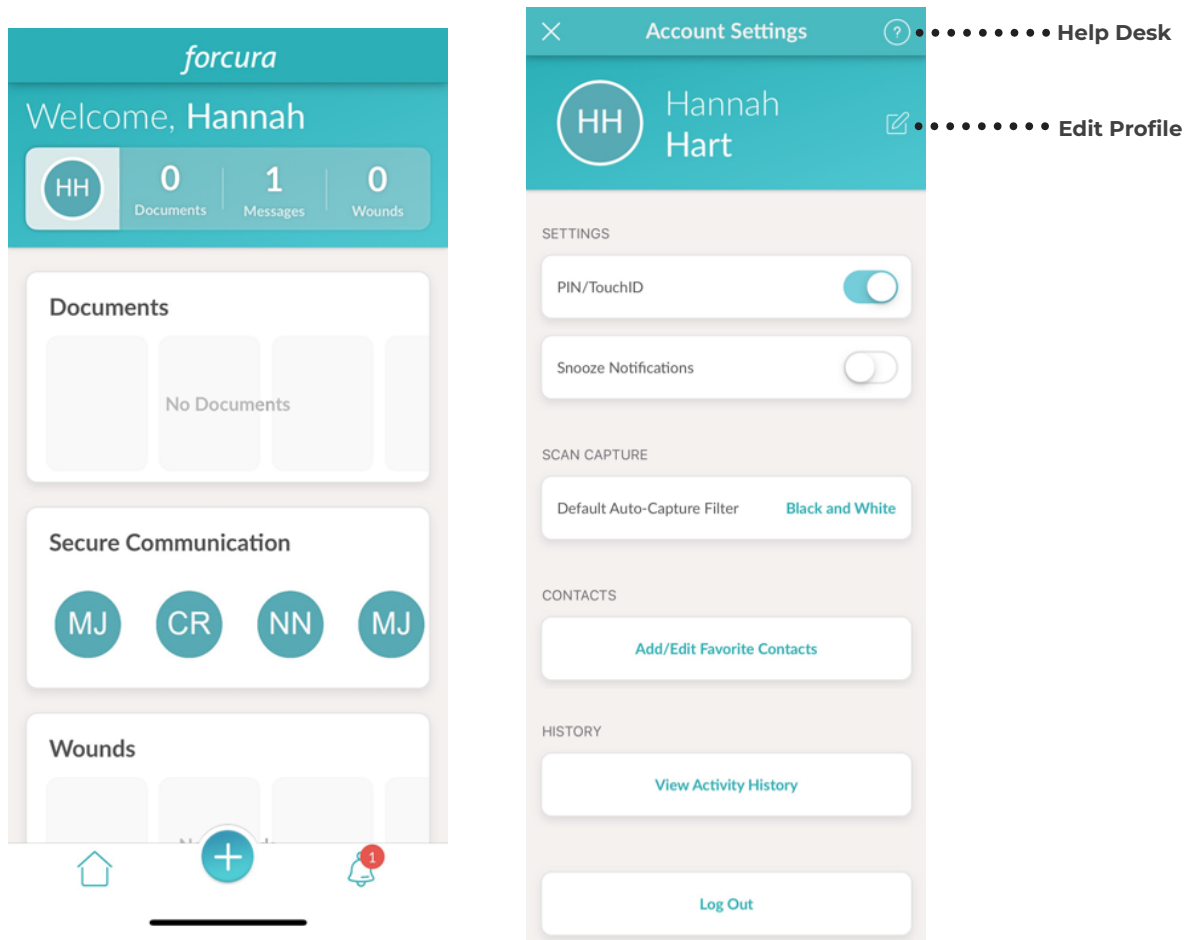
Step-By-Step Process

Account Settings

Manage Account Settings

- Select your initials to access Account Settings.

- Manage the following on the Account Settings page:

  o Select the Question Mark icon to access the Help Desk or Email Support.

  o Select the Edit icon to change your name and/or avatar.

  o Use the toggles to manage PIN/TouchID and Snooze Notifications.

  o Use the Auto-Capture Filter to automatically apply one of the filters to pages scanned using auto-capture. Filter options include: Black and White, Color Enhance, Greyscale, and Original (no filter).

  o In the Contacts section, tap 'Add/Edit Favorite Contacts' to set up your favorites list.

  o In the History section, tap 'View Activity History' to see a list of items you have uploaded to Shared Folders or Created Cases from.

- Select LOG OUT if sharing a mobile device with another user and that user will need to log in using their credentials.

  o Note: Selecting LOG OUT will REMOVE any saved documents or images from the mobile application.

Step-By-Step Process

Document Auto-Capture

- Open the Forcura App and select the **Plus Icon** at the bottom of your screen. From the Plus Icon, select **Document**. If your agency has Forms Management licensed you will then need to select **Capture Document** from the Pick an Action menu.

- Your device's camera will automatically open.

  - Use the eyedropper to adjust the filter if desired.

  - The filter can be adjusted after the document is captured as well.

  - Use the lightning bolt to turn the flash on and off. Please note if your device is not flash-enabled this icon will still appear but will not be functional.

- When ready, hold your device parallel to the document capturing the entire page. A teal outline will appear around the page edges. The app will automatically capture the document and a 'processing pages' screen will appear. Once the page is processed, the camera will reopen and is ready to capture additional pages as need.

- When all pages have been captured, tap the **white checkmark** in the bottom right corner of the screen.

- A window will appear prompting you to name the document. Please follow your agency's standard naming convention. If no name is typed, the date and timestamp will be used as the document name.

- Once the name is saved, you will be redirected back to the main page of Documents.
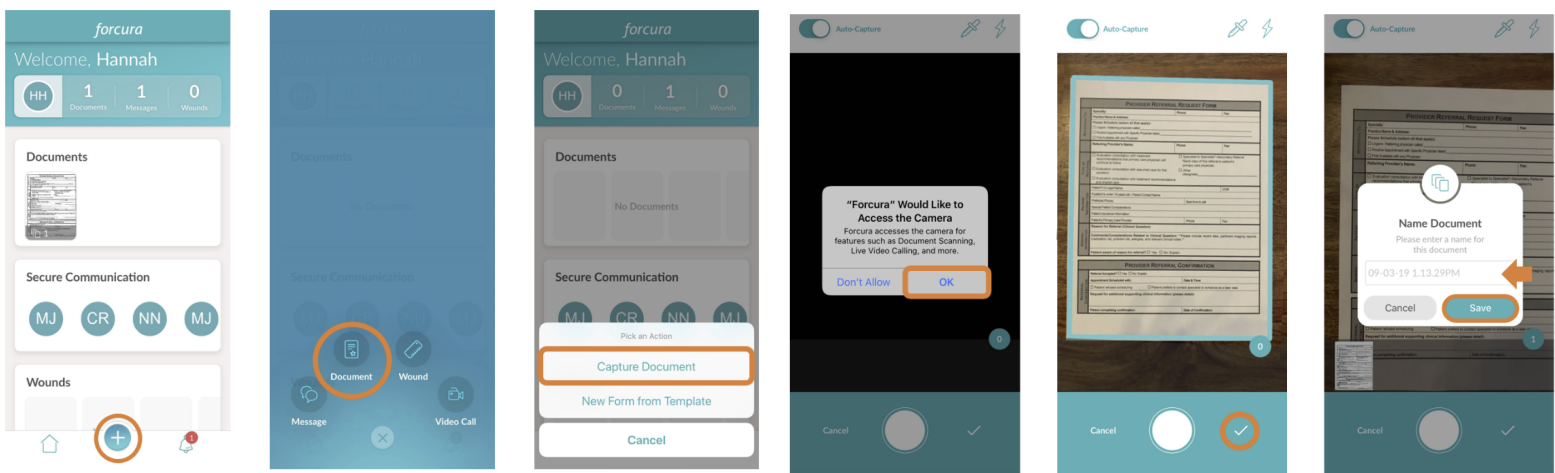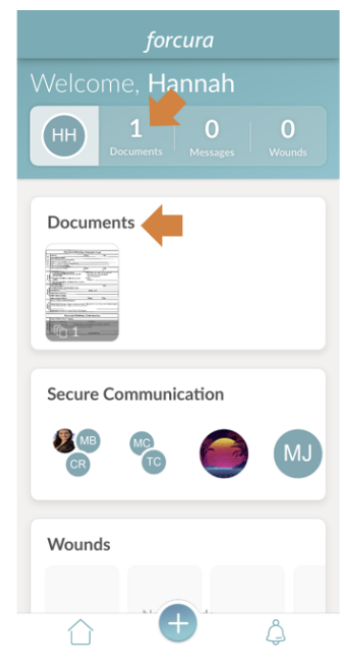
Step-By-Step Process

Document Manual-Capture

- Open the Forcura App and select the **Plus Icon** at the bottom of your screen. From the Plus Icon, select Document. If your agency has Forms Management licensed you will then need to select Capture Document from the Pick an Action menu.

- Your device's camera will automatically open.

  o Use the eyedropper to adjust the filter if desired.

  o The filter can be adjusted after the document is captured as well.

  o Use the lightning bolt to turn the flash on and off. Please note if your device is not flash-enabled, this icon will still appear but will not be functional.

- When ready, **tap the toggle** in the top left corner to **turn off Auto-Capture.** Hold your device parallel to the document making sure to get the entire page in frame.

- Tap the **white circle icon** to take a picture of the document, scanning additional pages as needed.

- When all pages have been captured, tap the **white checkmark** in the bottom right corner of the screen.

- A window will appear prompting you to name the document. Please follow your agency's standard naming convention. If no name is typed, the date and timestamp will be used as the document name.

- Once the name is saved, you will be redirected back to the main page of Documents.
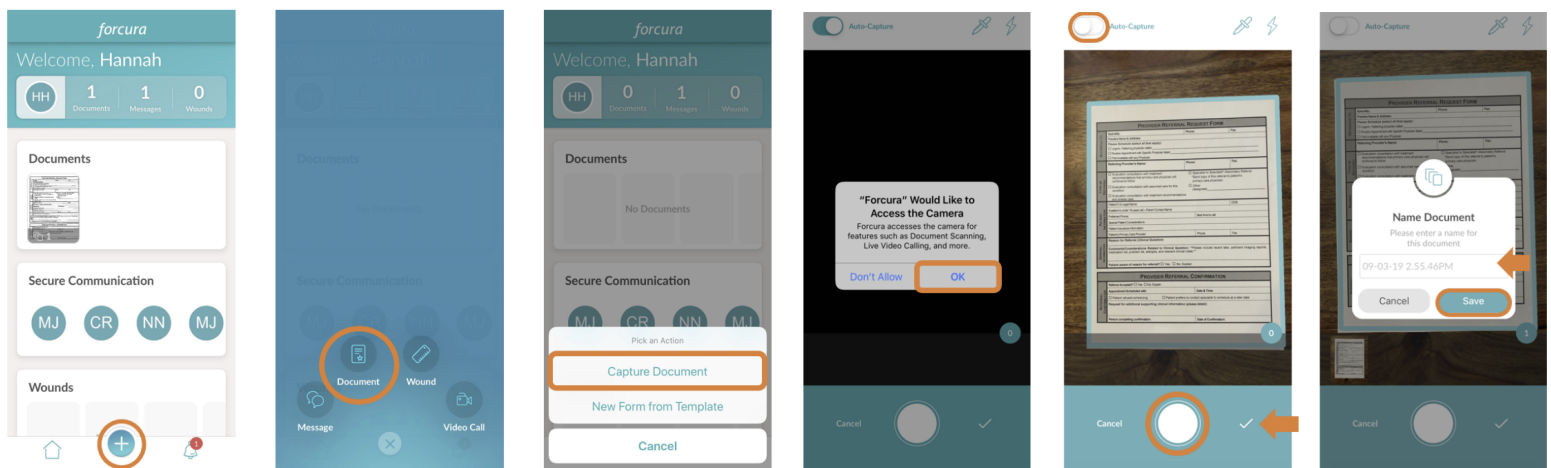
Step-By-Step Process

Making Edits to a Document

- From the main Documents screen, tap any image thumbnail to edit the scan using the following options:

  - **Crop** – Drag the edges to crop the image.

  - **Rotate** - Select the circular arrow to rotate the image.

  - **Filter** - Select the desired filter to enhance image quality and appearance.

  - **Trash** - Select the trashcan icon to delete pages.

- Once edits are complete, select the **back arrow** in top left corner to save changes and return to the main page.
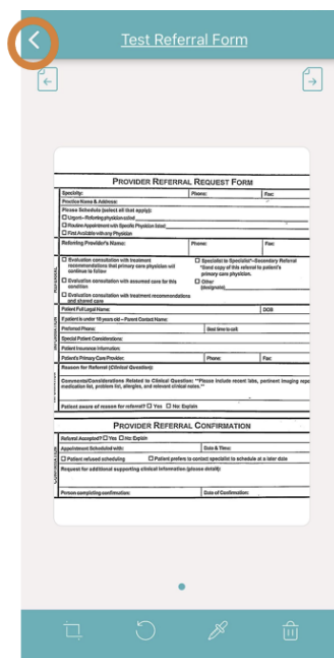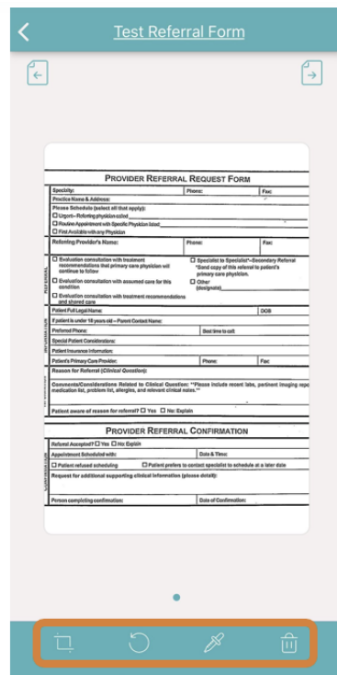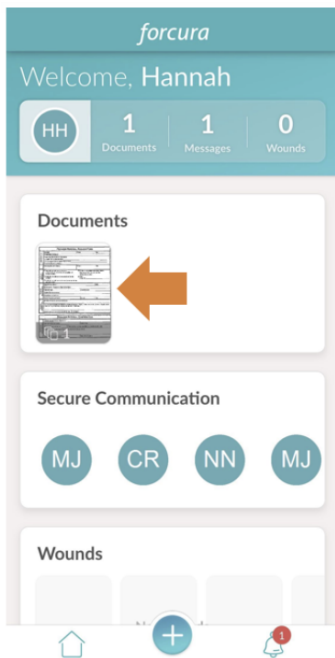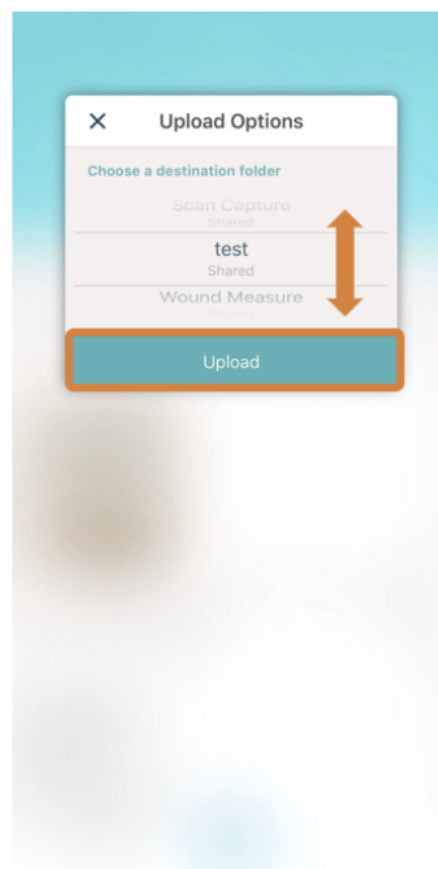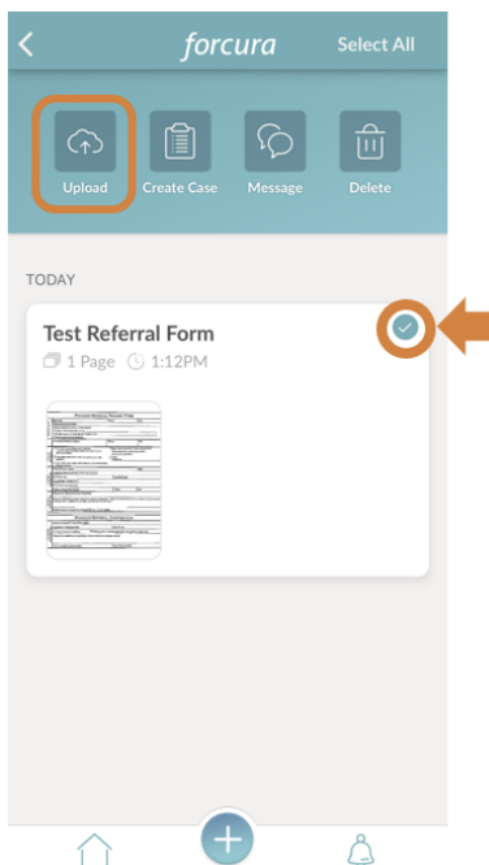
Step-By-Step Process

Documents

Upload a Document to a Shared Folder

- To upload a document to a Shared Folder in Drive, tap the gray circle in the top right corner of the document preview box. This selects the document and populates a menu at the top.

- Tap the Upload Icon from the menu.

- Scroll to select a destination folder (folders in Drive). This is the folder where the document will be placed.

- Tap **Upload.**

- The document is removed from the mobile app and appears in the web application in the folder selected for further processing.
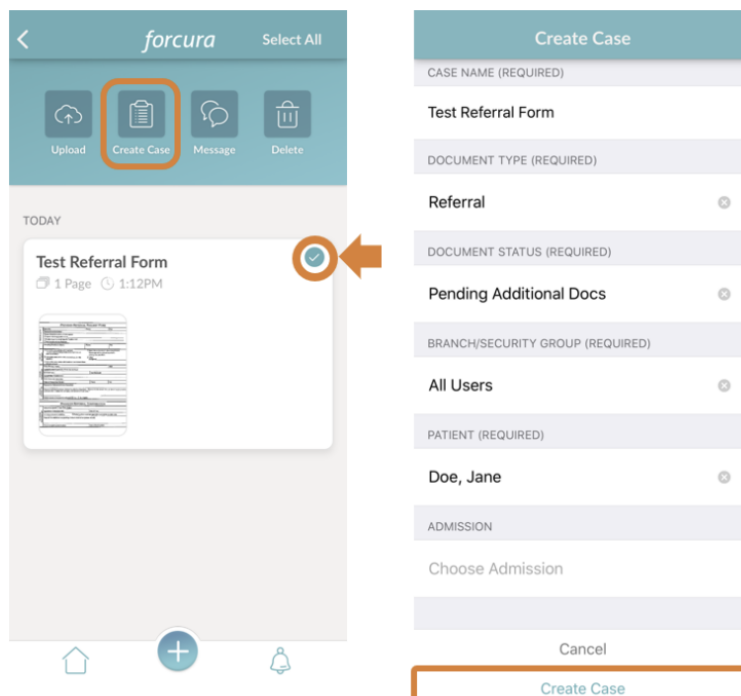
Step-By-Step Process

Documents

Create a Case from a Document

- To Create a Case, tap the gray circle in the top right corner of the document preview box. This selects the document and populates a menu at the top.

- Tap the Create Case Icon (clipboard) from the menu.

- From the menu at the top, select **Create Case**.

- In the create case window, complete the following fields:
    - Case Name
    - Document Type
    - Document Status
    - Branch/Security Group
    - Patient
    - Admission if applicable.

- Tap **Create Case**.

- The document is removed from the mobile app and appears in the web application under Cases and under the assigned Document Status.

Step-By-Step Process

Documents

Send a Document in Secure Communication

Please note: This option will only be available for agencies who have both Documents and Secure Communication licensed.

• To send a document within a Secure Message, tap the gray circle in the top right corner of the document preview box. This selects the document and populates a menu at the top.

• Tap the Message Icon (speech bubbles) from the menu.

• If you wish to send the document within an existing conversation, scroll and select.

• If you wish to send the document in a new conversation, tap the plus icon at the bottom and then select 'Create New Conversation'.

• Documents sent in Secure Communication remain in the mobile app should you also need to upload the document or create a case.