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# Image-In Acquisition client installation and user guide

For AccuRoute v3.01

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# Section I: Installing Image-In Acquisition Tool

This section includes:

[Requirements](#) (I-1)

[Accessing the setup files](#) (I-2)

[Installing Image-In Acquisition client](#) (I-2)

## Requirements

### Server requirement

- AccuRoute server v3.01

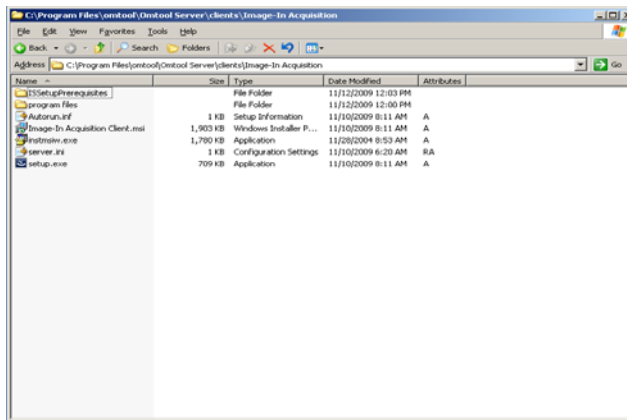
### Hardware and software requirements

The requirements are as follows:

- Pentium®-class processor
- Windows 2008/2003 SP2/ XP Professional/Vista or later
- 20 MB hard disk space
- 64 MB RAM (128 recommended)
- Acrobat® Reader® 9.x/8.x/7.x.

## Accessing the setup files

The Image-in Acquisition setup files are located in the **C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\CLIENTS\IMAGE-IN ACQUISITION** directory of the system running the AccuRoute server. If you are installing Image-In Acquisition in the same system, simply navigate to this folder to access the setup files.



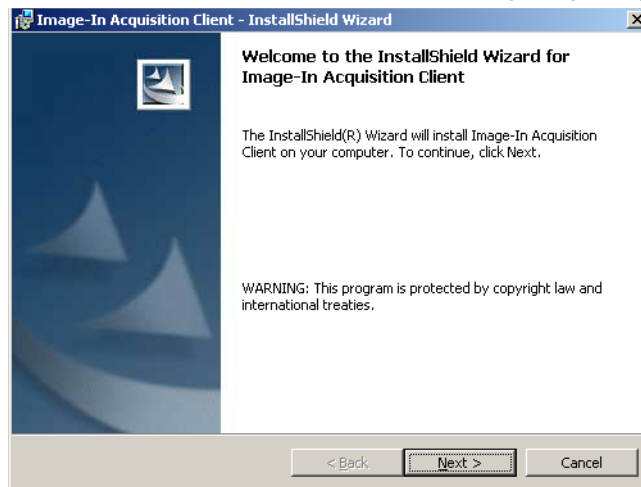
If you are installing Image-In Acquisition in a separate system, ensure that proper access permissions have been set up for you to access the **C:\PROGRAM FILES\OMTOOL\OMTOOL SERVER\CLIENTS\IMAGE-IN ACQUISITION** directory from the system where you are installing Image-In Acquisition. You can also copy the setup files to a shared network directory.

## Installing Image-In Acquisition client

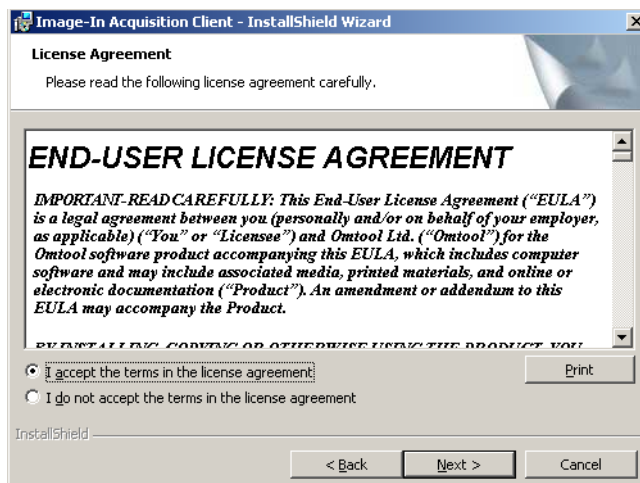
### To install Image-In Acquisition:

- 1 Log on to the client using an account that belongs to the Administrators group and navigate to the directory containing the setup files.

- 2 Click **SETUP.EXE**. The InstallShield wizard configures your system and shows the **Welcome** message.

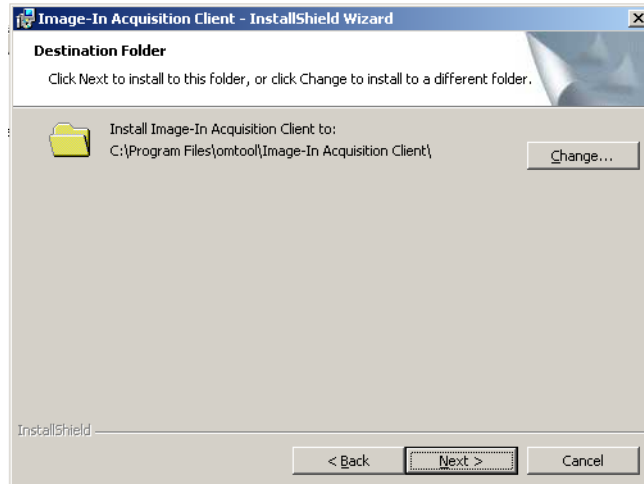
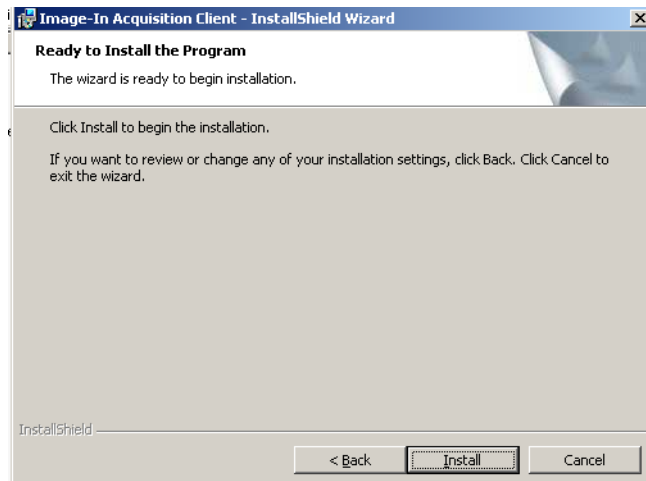


- 3 Click **NEXT**. The setup shows the license agreement. Read the agreement carefully and if you agree to the terms, click **YES**.

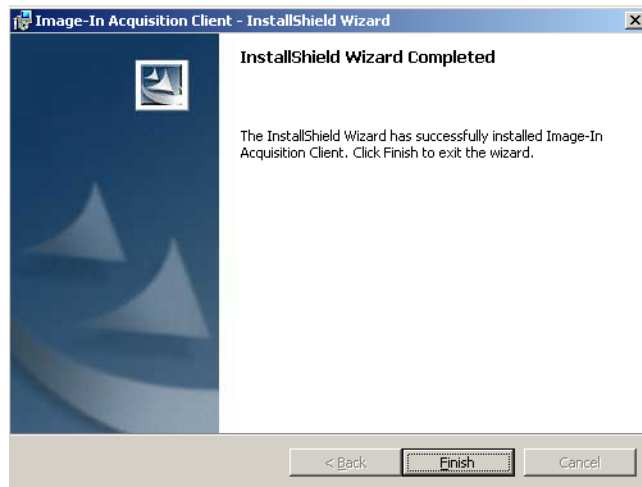


**4** Click **NEXT**.

The **Destination Folder** page opens. The default destination is **C:\PROGRAM FILES\OMTOOL\IMAGE-IN ACQUISITION CLIENT**.

**5** Click **NEXT** if you want the default destination. The **Ready to Install the Program** page opens. If you want to install in a non-default location, click **BROWSE** and then select the desired location and then click **NEXT**.**6** Click **INSTALL** to begin the installation. When installation is complete, you see the **InstallShield Wizard Complete** message.





- 7 Click **FINISH** to close the wizard.

Section I: Installing Image-In Acquisition Tool

# Section 2: Image-In Acquisition Desktop

This section includes:

[Becoming familiar with the user desktop](#) (2-1)

[User Interface](#) (2-1)

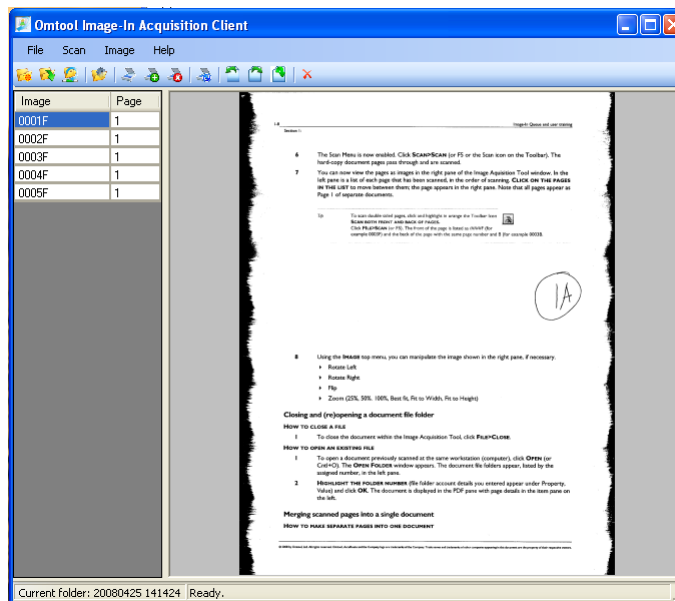
[Top Menu Bar](#) (2-2)

[Tool Bar Icons \(in order, left to right\)](#) (2-4)

[Image/page number pane and PDF viewer pane](#) (2-4)

## Becoming familiar with the user desktop

### User Interface

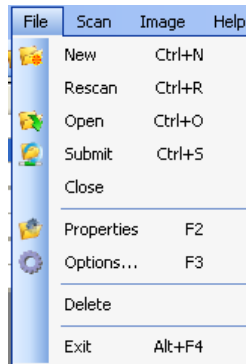


The Image-In Acquisition client user interface is composed of a top menu bar, a tool bar, an image/page number pane, a PDF viewer pane and a status bar with the folder number.

Often there are several ways to access common commands, which are all described under the relevant heading. Keyboard shortcut keys, when applicable, are given in parenthesis.

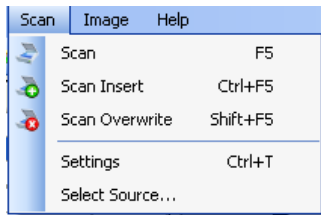
## Top Menu Bar

### File menu



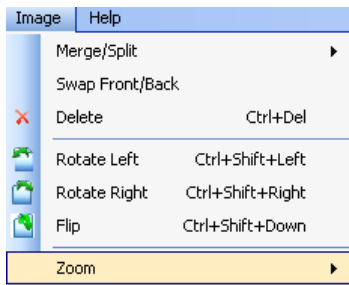
- ▶ New (Cntl+N) opens the Properties window and enables the Scan command
- ▶ Rescan (Cntl+R)
- ▶ Open (Cntl+O) an existing document
- ▶ Submit (Cntl+S) the document to IIQ
- ▶ Close the current document
- ▶ Properties (F2) displays the index window with Folder number, Medical record, and Account number.
- ▶ Options (F3) Note: This diagnostic should be enabled only at the request of tech support.
- ▶ Delete removes the folder and all images in it.
- ▶ Exit (Alt+F4) the application

## Scan menu



- ▶ Scan new images to the end of a folder.
- ▶ Scan Insert scans images and puts them before the selected image.
- ▶ Scan Overwrite scans new images and overwrites starting at the current image. (Also see [Substituting a page in a document](#) on 3-8.)
- ▶ Settings (or Cntl+T) for the scanner allows the choice of:
  - ▲ Color, Black & White or Grayscale, which may help with the quality of some problem documents
  - ▲ resolution in DPI
  - ▲ Duplex
  - ▲ Show scanner UI
- ▶ Select Source allows you to choose which scanner to use.

## Image Menu



- ▶ Merge/Split collects pages into a single document or subtracts them from an existing document. (Also see [Merging scanned pages into a single document](#) on 3-4.) and (Also see [Splitting double-sided merged pages into individual pages](#) on 3-7.)
- ▶ Swap Front/Back
- ▶ Delete (Cntl+Del) deletes the image selected.
- ▶ Rotate Left (Cntl+Shift+Left)
- ▶ Rotate Right (Cntl+Shift+Right)
- ▶ Flip (Cntl+Shift+Down)
- ▶ Zoom (25%, 50%, 100%, Best fit, Fit to Width, Fit to Height)

## Help

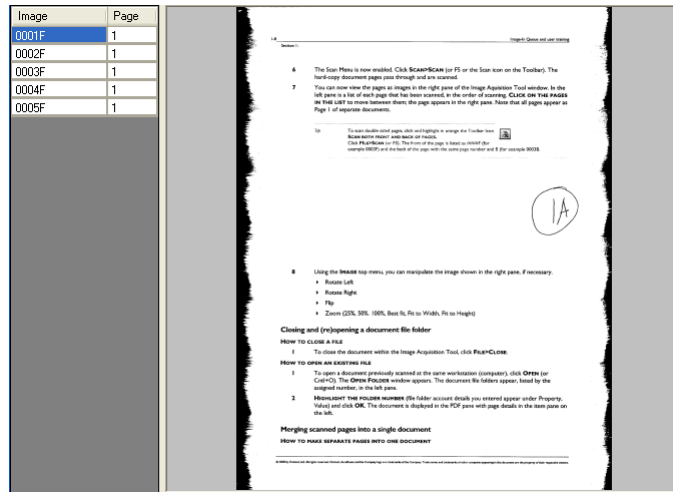
(TBD)

## Tool Bar Icons (in order, left to right)



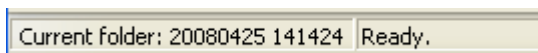
- ▶ Create a new folder (Ctrl+N) (Also see [Scanning a document](#) on 3-2.)
- ▶ Open a folder previously scanned on this workstation (Ctrl+O)  
(Also see [Closing and \(re\)opening a document file folder](#) on 3-4.)
- ▶ Submit folder to Image-In Queue (Ctrl+S) (Also see [Submitting a document to IIQ](#) on 3-9.)
- ▶ Display or modify folder properties (F2)
- ▶ Scan (F5) enters the image of the page into Image-In (Also see [Scanning a document](#) on 3-2.)
- ▶ Scan images and place them before the selected image (Ctrl+F5)  
(Also see [Substituting a page in a document](#) on 3-8.)
- ▶ Scan new images, overwriting starting at the current image (Shift+F5)  
(Also see [Substituting a page in a document](#) on 3-8.)
- ▶ Scan both front and back of pages (Also see [Scanning a document](#) on 3-2.)
- ▶ Rotate the image 90 degrees counter-clockwise (Click+Shift+Left Arrow)
- ▶ Rotate the image 90 degrees clockwise (Click+Shift+Right Arrow)
- ▶ Flip the current image (Click+Shift+DownArrow)
- ▶ Delete the current image

## Image/page number pane and PDF viewer pane



The image and page number pane lists the pages that have been scanned and gives information about their pagination in the document. The highlighted page can be viewed and manipulated in the PDF viewer pane.

## Status bar



The status bar shows the folder number and current action.

# Section 3: Working with IIA documents

This section shows you how to perform the document processing functions available in the Image-In Acquisition software portion of the Omtool Healthcare Suite.

Working with documents:

[Scanning a document](#) (3-2)

[Closing and \(re\)opening a document file folder](#) (3-4)

[Merging scanned pages into a single document](#) (3-4)

[Splitting merged pages into individual pages](#) (3-5)

[Merging double-sided pages](#) (3-5)

[Splitting double-sided merged pages into individual pages](#) (3-7)

[Deleting a page from a document](#) (3-7)

[Deleting a file \(or document\)](#) (3-8)

[Adding a page to a document](#) (3-8)

[Substituting a page in a document](#) (3-8)

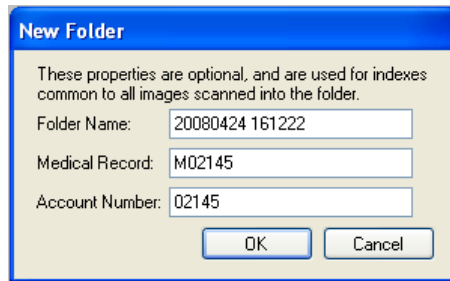
[Submitting a document to IIQ](#) (3-9)

# Working with documents in IIA

## Scanning a document

To scan a document for use in IIQ by using the Image-In Acquisition Tool software, use the following steps:

- 1 Open the Image-In Acquisition Tool software by clicking on the desktop **OMTOOL IMAGE-IN ACQUISITION TOOL ICON** or in **START>ALL PROGRAMS>OMTOOL>IMAGE-IN ACQUISITION CLIENT**.
- 2 Place the document pages to be scanned in the scanner.
- 3 Click **FILE>NEW** in the top menu of the Image Acquisition Tool (or Cntl+N or use the Icon on the Toolbar).



**New Folder**

These properties are optional, and are used for indexes common to all images scanned into the folder.

Folder Name:

Medical Record:

Account Number:



- 4** Enter the account information:
- ▶ Folder Name (generated by IIQ)
  - ▶ Medical Record
  - ▶ Account Number

---

*Tip* If your document includes a barcode, this can be scanned along with the document page and therefore, you may not have to enter the Medical Record and Account Number information manually at this time

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- 5** Click **OK**.
- 6** The Scan Menu is now enabled. Click **SCAN>SCAN** (or F5 or the Scan icon on the Toolbar). The Cancel Scanning? window displays. The hard-copy document pages pass through and are scanned. The Cancel Scanning? window closes.
- 7** You can now view the pages as images in the right pane of the Image Acquisition Tool window. In the left pane is a list of each page that has been scanned, in the order of scanning. **CLICK ON THE PAGES IN THE LIST** to move between them; the page displays in the right pane.

---

*Note* All pages appear as Page 1 of separate documents.  
(Also see [Merging scanned pages into a single document](#) on 3-4.)

---

*Tip* To scan double sided pages, click and highlight in orange the Toolbar Icon **SCAN BOTH FRONT AND BACK OF PAGES**.

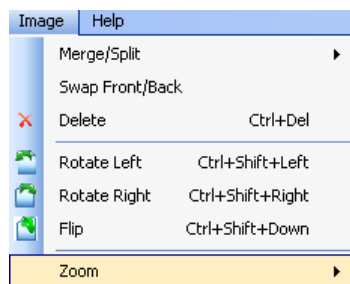


Click **FILE>SCAN** (or F5). The front of the page is listed as #####F (for example 0003F) and the back of the page with the same page number and B (for example 0003B).

If you scan the page incorrectly, you can switch the sides, making the back (B) of the double-sided page into the front (F), within the II-A software and without rescanning. Highlight one side (F or B) of the double-sided document page. Click **Image>SwapFront/Back**.

---

- 8** Using the **IMAGE** top menu, you can manipulate the image shown in the right pane, if necessary.



- ▶ Rotate Left (or Cntl+Shift+Left Arrow)
- ▶ Rotate Right (or Cntl+Shift+Right Arrow)
- ▶ Flip 180% (or Cntl+Shift+Down Arrow)
- ▶ Zoom (25%, 50%, 100%, Best fit, Fit to Width, Fit to Height)

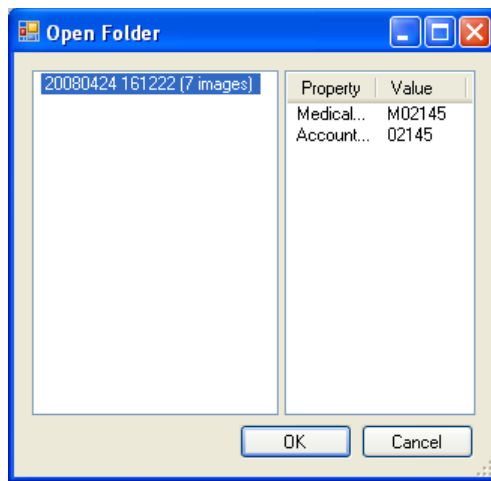
## Closing and (re)opening a document file folder

To close a file:

- I To close the document within the Image Acquisition Tool, click **FILE>CLOSE**.  
The document remains within the Image Acquisition software, until it is opened again and submitted to Image-In Queue.

To open an existing file, use the following steps:

- I To open a document previously scanned at the same workstation (computer), click **FILE>OPEN** (or Cntl+O). The **OPEN FOLDER** window displays. The document file folders appear, listed by the assigned number, in the left pane.



- 2 **HIGHLIGHT THE FOLDER NUMBER** (File folder account details you entered appear under Property and Value.) and click **OK**. The document is displayed in the PDF pane with page details in the item pane on the left.

## Merging scanned pages into a single document

To make individual one-sided pages into one document, use the following steps:

Open the document file folder, if you have closed it for any reason, as in the previous step.

In order to make the individual scanned pages into one document, you have to Merge each page into the document. If the document pages have been scanned in the correct order, it is probably most logical to merge the pages in consecutive order. If, for example, the first page scanned (0001F) is the accepted first page of the document, continue in this manner.

- I In the page number pane, **CLICK AND HIGHLIGHT THE PAGE** (for this example 0002F, the second page scanned) that is to become Page 2.

Image	Page
0001F	1
0002F	1
0003F	1

- 2 Click **IMAGE> MERGE/SPLIT>WITH PREVIOUS** (Cntl+M). The page that was highlighted displays as Page 2 to the page shown before it in the list.

Image	Page
0001F	1
0002F	2
0003F	1

- 3 Highlight the page that is to be next in order and repeat Step 2, until all the relevant pages are merged into one document.

---

*Note* Any page can be merged with the document previous to it in the list, in any order.

---

## Splitting merged pages into individual pages

You can reverse the process of making the individual scanned pages into one document by splitting any page away from the document.

To separate pages from a document, use the following steps:

- 1 In the page number pane, **CLICK AND HIGHLIGHT THE PAGE** (for this example 0002F, the second page scanned) that is to be separated from the document.
- 2 Click **IMAGE> MERGE/SPLIT>WITH PREVIOUS** (Cntl+Shift+M). The page that was highlighted is separated from the page shown before it in the list.
- 3 Repeat Step 1 and 2, until all the necessary pages are separated from the document.

---

*Note* Any page can be split from the page, and document, previous to it in the list, in any order. If there are pages following the split page, they are renumbered sequentially, with the split page as Page 1.

---

## Merging double-sided pages

To make individual double-sided pages into one document, use the following steps:

Open the document file folder, if you have closed it for any reason, as in the previous step.

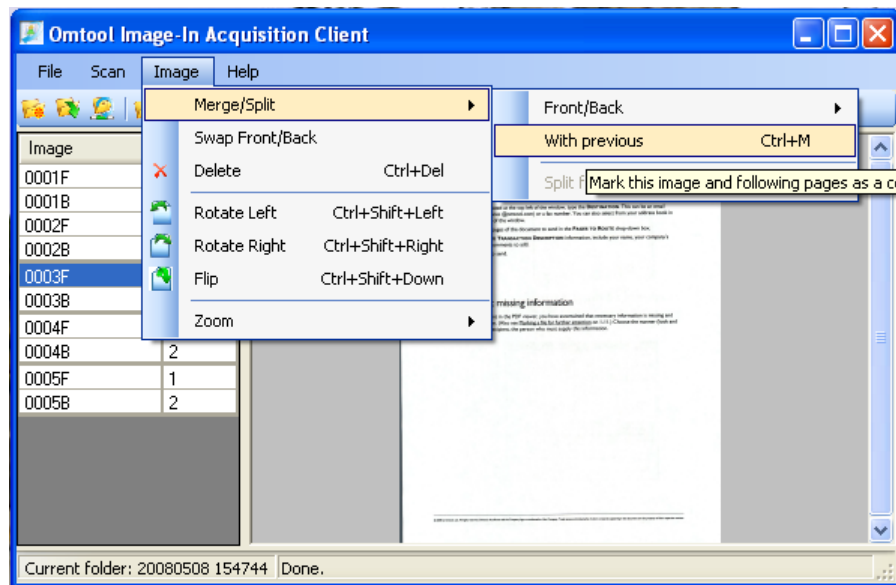
In order to make the double-sided scanned pages into one document, you have to Merge each double-sided page into the document. If the document pages have been scanned in the correct order, it is probably most logical to merge the pages in consecutive order. If, for example, the first page scanned (0001F and 0001B) is the accepted first page of the document, continue in this manner.

- 1 There are 5 double-sided pages shown in the figure below. In the page number pane, **CLICK AND HIGHLIGHT THE PAGE** (for this example 0002F, the front of the second page scanned) that is to become the front of Page 2 of the document.

Image	Page
0001F	1
0001B	2
0002F	1
0002B	2
0003F	1
0003B	2
0004F	1
0004B	2
0005F	1
0005B	2

- 2 Click **IMAGE> MERGE/SPLIT>WITH PREVIOUS** (Cntl+M). The page that was highlighted displays as Page 3 (Front) and Page 4 (Back) to the double-sided page shown before it, Page 1 (Front) and Page 2 (Back), in the list.

**Note** The double sided pages that are as yet not merged into the document are numbered 0005F Page 1 and 0005B Page 2 for example.



- 3 Highlight the front of the page that is to be next in order and repeat Step 2, until all the relevant pages are merged into one document.

Image	Page
0001F	1
0001B	2
0002F	3
0002B	4
0003F	5
0003B	6
0004F	7
0004B	8
0005F	9
0005B	10

## Splitting double-sided merged pages into individual pages

You can reverse the process of making the individual double-sided scanned pages into one document by splitting any double-sided page away from the document.

To separate pages from a document, use the following steps:

- 1 In the page number pane, **CLICK AND HIGHLIGHT THE PAGE** (for this example 0002F, the front of the second page scanned) that is to be separated from the document.
- 2 Click **IMAGE>MERGE/SPLIT>WITH PREVIOUS** (Cntl+Shift+M). The page that was highlighted is separated from the page shown before it in the list.
- 3 Repeat Step 1 and 2, until all the necessary pages are separated from the document.

---

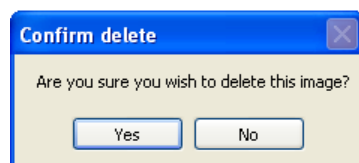
*Note* Any page can be split from the page, and document, previous to it in the list, in any order. If there are pages following the split page, they are renumbered sequentially, with the double-sided split page as Page 1 and Page 2.

---

## Deleting a page from a document

To delete a page from a document, use the following steps:

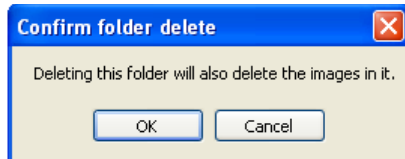
- 1 **CLICK AND HIGHLIGHT THE PAGE** of the document in the Page view pane.
- 2 Click **IMAGE>DELETE** (Cntl+Del). The Confirm Delete window displays with the warning message “Are you sure you wish to delete this image?”. Click **YES** to confirm.



## Deleting a file (or document)

To delete a document file, use the following steps:

- 1 **CLICK AND HIGHLIGHT ANY PAGE** of the document in the Page view pane.
- 2 Click **FILE>DELETE**. The Confirm Folder Delete window displays with the warning message that “Deleting this file will also delete the images in it.”. Click **OK** to confirm.



## Adding a page to a document

To add a page to a document, use the following steps:

- 1 Place a document in the scanner.
- 2 Highlight a page. Note that the inserted pages are placed **before** the highlighted page.
- 3 Click **SCAN>SCAN INSERT** (Cntl+F5 or the “Scan Images and place them before the selected image” Icon on the Toolbar). The Cancel scanning window displays briefly, and closes. The document pages are scanned.

The newly-scanned pages appear in the page number pane list **after** the page you highlighted. The pages are renumbered from 0001F.

## Substituting a page in a document

To substitute one page for another in a document, use the following steps:

- 1 Place a document in the scanner.
- 2 Highlight a page. Note that the inserted page replaces the highlighted page.
- 3 Click **SCAN>SCAN OVERWRITE** (Shift+F5 or the “Scan new images, overwriting starting at the current page” Icon on the Toolbar). The Cancel scanning window displays briefly, and disappears. The document pages are scanned.

The newly-scanned page displays in the page number pane list **in place of** the page you highlighted.

---

**Note** If multiple pages are scanned, the replacement begins with the highlighted page and adds the rest of the newly-scanned pages into the list after that new page.

---

## Submitting a document to IIQ

To send the scanned document to Image-In Queue for processing, use the following steps:

- 1 Click **FILE>SUBMIT**
- 2 The **IMAGE-IN ACQUISITION CLIENT** window displays informing you that the document folder has been submitted.



- 3 Click **OK**.
- 4 The document is now visible in IIQ, in the New folder in the tree of the Item View Pane.

---

**Important** As the document is submitted to IIQ, a routing sheet for the document is created. This routing sheet is used to track the document in the Image-In Acquisition tool and in IIQ.

---

## Re-scanning a document

Your document was scanned into Image-In Queue. You noticed missing information and flagged the document. The document was then sent to the person who could supply the information and now you have the piece of information needed on updated hard-copy document page.

In order to add that information to the electronic file, rescan the document along with the Routing Sheet that was generated for it.

To rescan an updated page of a document, use the following steps:

- 1 Place the Routing Sheet and the updated document page in the scanner.
- 2 Click **FILE>RESCAN** (or Cntl+R)
- 3 Click **SCAN>SCAN**.
- 4 The document pages feed through the scanner. They can be viewed in Image-In.
- 5 Click **FILE>SUBMIT**.
- 6 The **IMAGE-IN ACQUISITION CLIENT** window displays informing you that the document folder has been submitted.
- 7 Click **OK**.
- 8 The document is now visible in IIQ, in the Rescan folder in the tree of the Item View Pane. (See the Image-In Queue end user guide (or the appropriate user guide for another compatible AccuRoute product) for instructions on how to complete processing the document.





# Section 4: Quick Start Tutorial #1

This section includes:

An example of a typical workflow process with a simple document.

This document uses 2 components of the Omtool Healthcare Suite, which work with one another to help you scan, process and file your documents:

- Image-In Acquisition tool
- Image-In Queue (IIQ)

## A Simple Workflow

This sample workflow demonstrates how to work with a document that is scanned, processed and filed.

## Quick Start Tutorial #1

This tutorial covers:

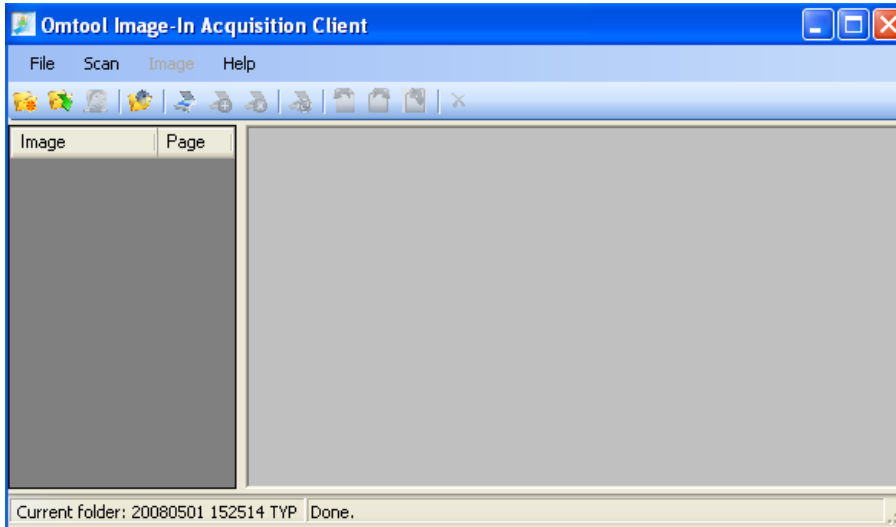
- ▶ Scanning a document into IIQ to view it
- ▶ Printing the document
- ▶ Sending the document to a recipient
- ▶ Saving the document to your own computer
- ▶ Filing the document in the database and moving to processed folder

## Scan and View

You use your scanner to scan hard-copy documents into the system, using the Omtool Image-In Acquisition Tool software. The electronic document is sent to Image-In Queue (IIQ) where it displays in a numbered file folder. Notice that the file folder has content, indicated by (1). You can view the document image by clicking on its folder, which displays under New Items.

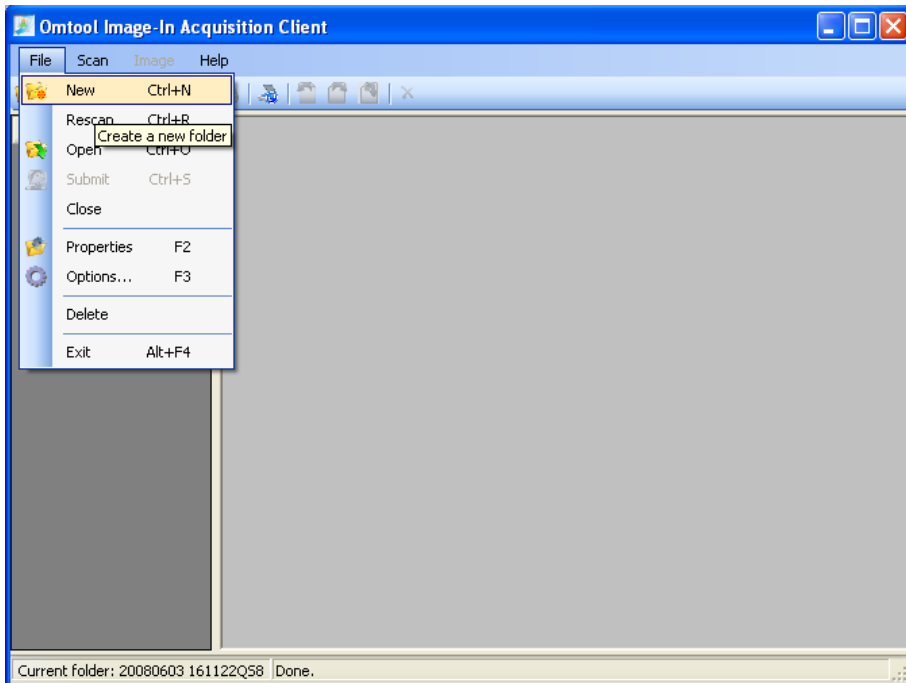
### Figure 4-A: Scan

Open the Omtool Image-In Acquisition Tool client program.



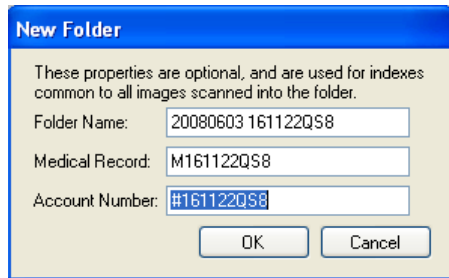
### Figure 4-B: New Folder

Create a new numbered file folder.



**Figure 4-C: New folder**

A folder number is automatically generated. Type in the Medical Record and Account Number.  
(For this example, the file number given ends in QSI, which displays later in Image-In Queue to help follow the sample process.)



The dialog box titled "New Folder" contains the following text and fields:

These properties are optional, and are used for indexes common to all images scanned into the folder.

Folder Name:

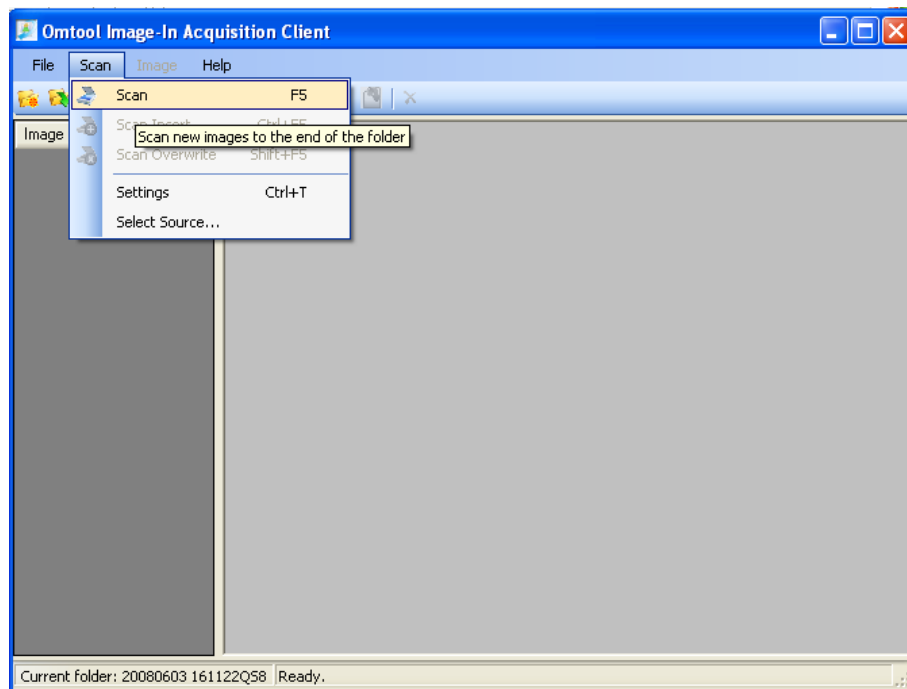
Medical Record:

Account Number:

Buttons: OK, Cancel

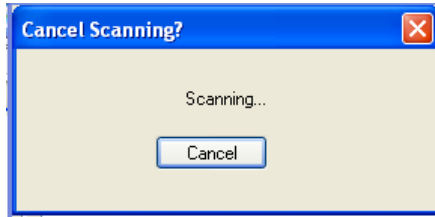
**Figure 4-D: Scan**

Put all the pages of the document into the scanner. Click **Scan>Scan**. The example here is a 5 page document.



### Figure 4-E: Scanning

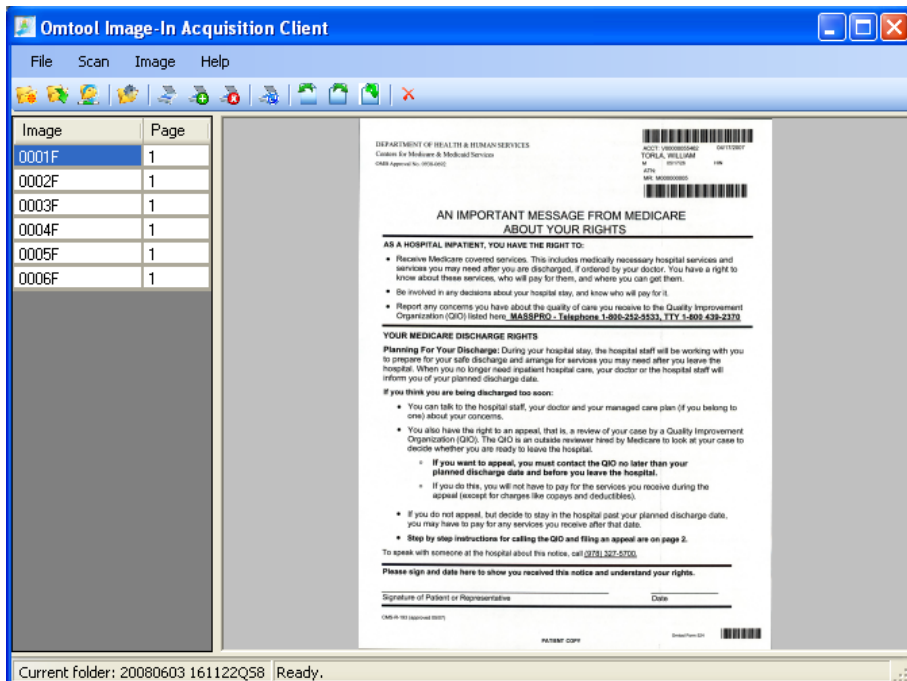
The Image-In Acquisition Tool software scans the document.



### Figure 4-F: View

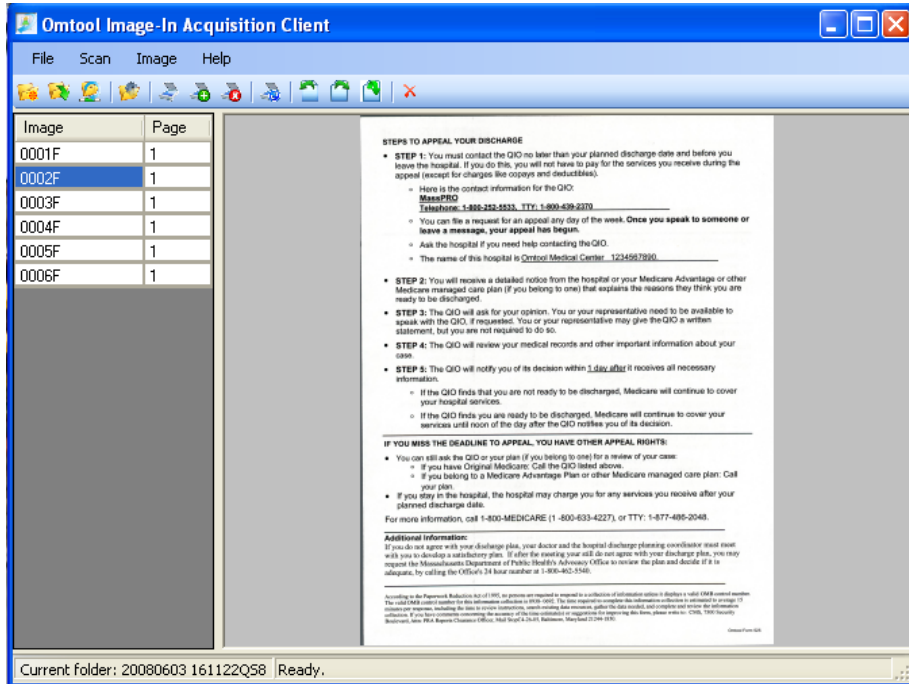
The pages are all visible in the Viewer, in the order in which they were scanned. Click on each page number on the left to see the image in the right pane. Notice that each of the 5 one-sided pages is separate, indicated by the "I" next to each page. The "F" indicates that a page is the front of the hard copy document page.

*Tip* The Image-In Acquisition Tool does scan double-sided pages as well. Click the Double-Sided icon on the Toolbar before following the procedure above. The back side is indicated by a "B".

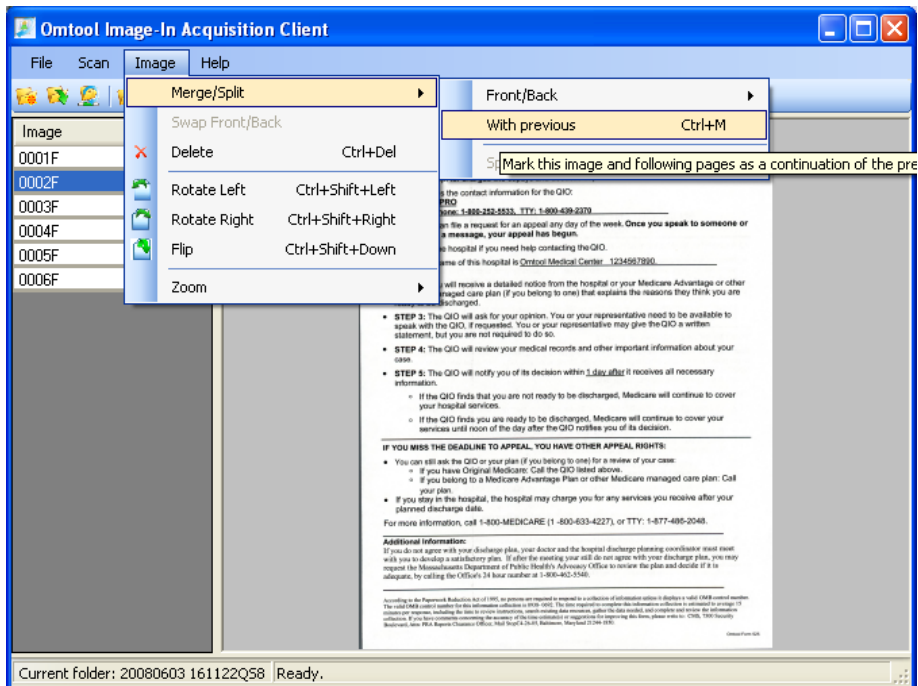


**Figure 4-G: Merge**

Merge the second page with the first, to begin combining the single pages into one document.  
Highlight the second page.

**Figure 4-H: Merge**

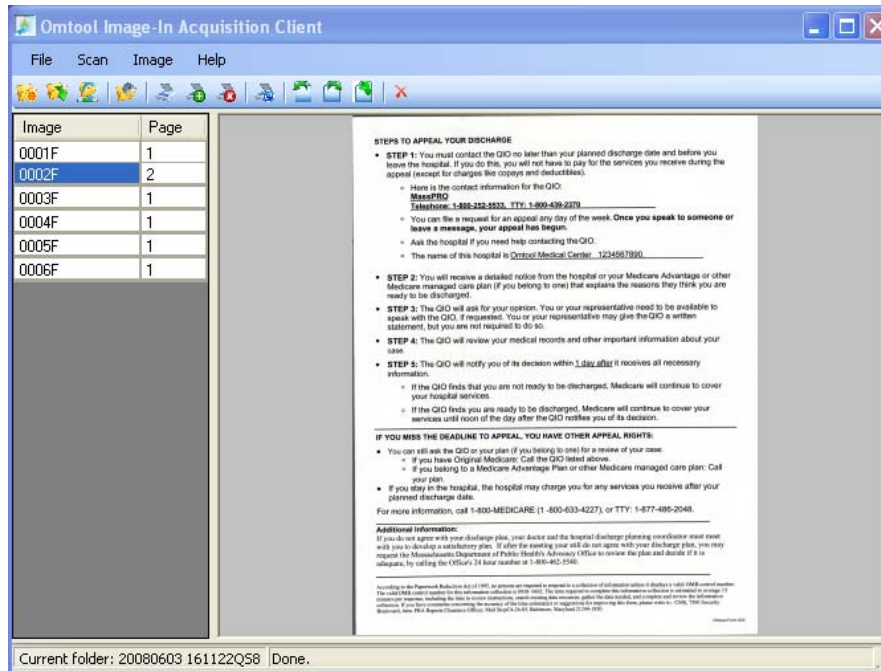
Click **Image>Merge/Split>With previous**.



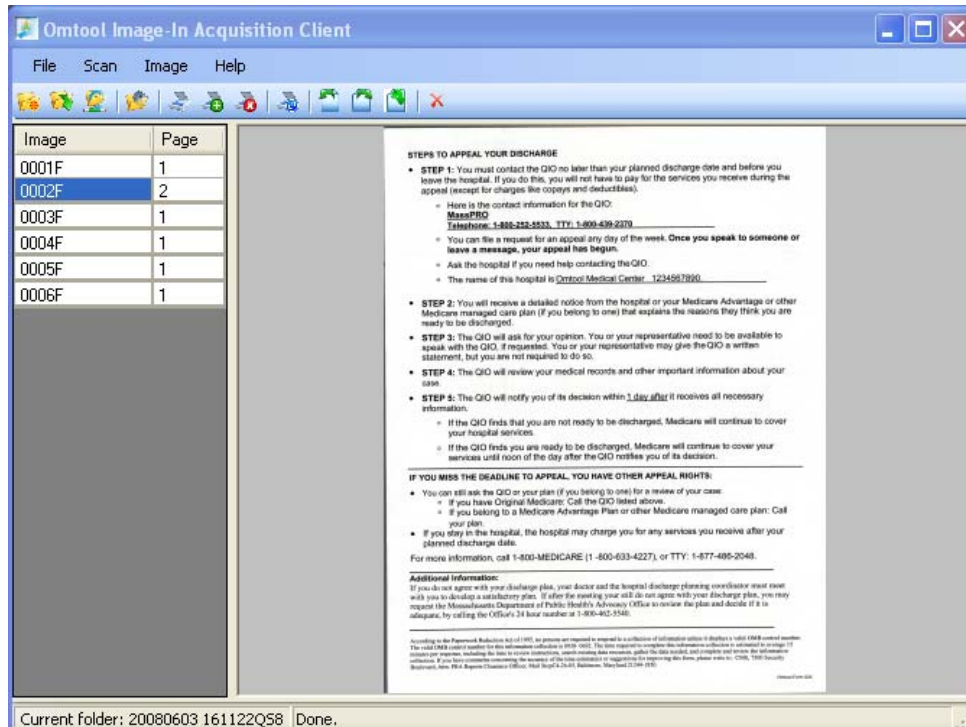
## Section 4: Quick Start Tutorial #1

**Figure 4-I: Merge**

The second page is now part of one document with the first page, as indicated by the Page 2.

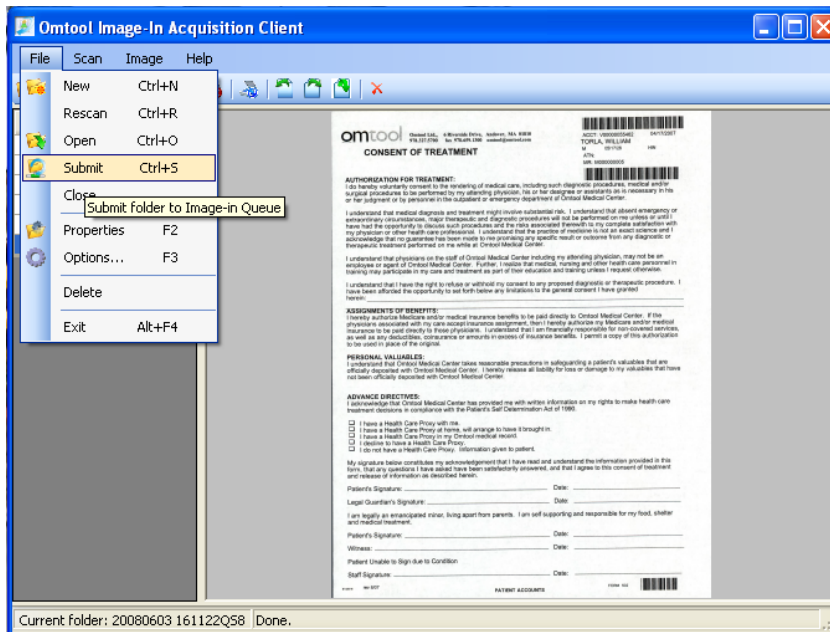
**Figure 4-J: Merge**

Repeat the process for the remaining single pages, until they are all merged into one document, as indicated by the page numbers 1 through 6.

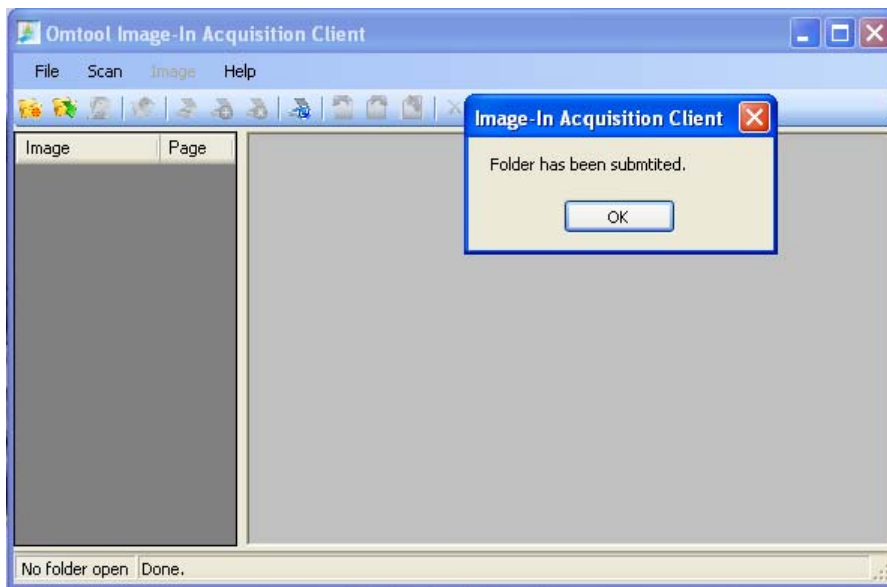


**Figure 4-K: Submit**

Click **File>Submit** to send the document folder to Image-In Queue for processing.

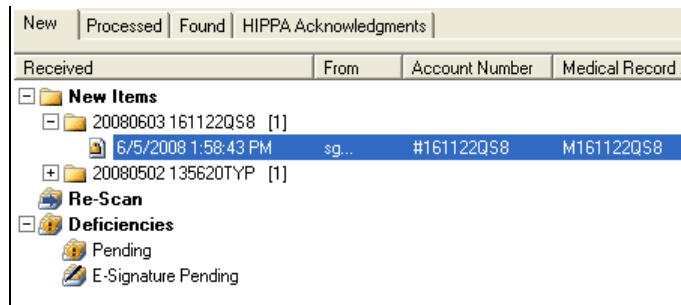
**Figure 4-L: Submit**

The Image-In Acquisition software confirms the file folder has been sent to IIQ.



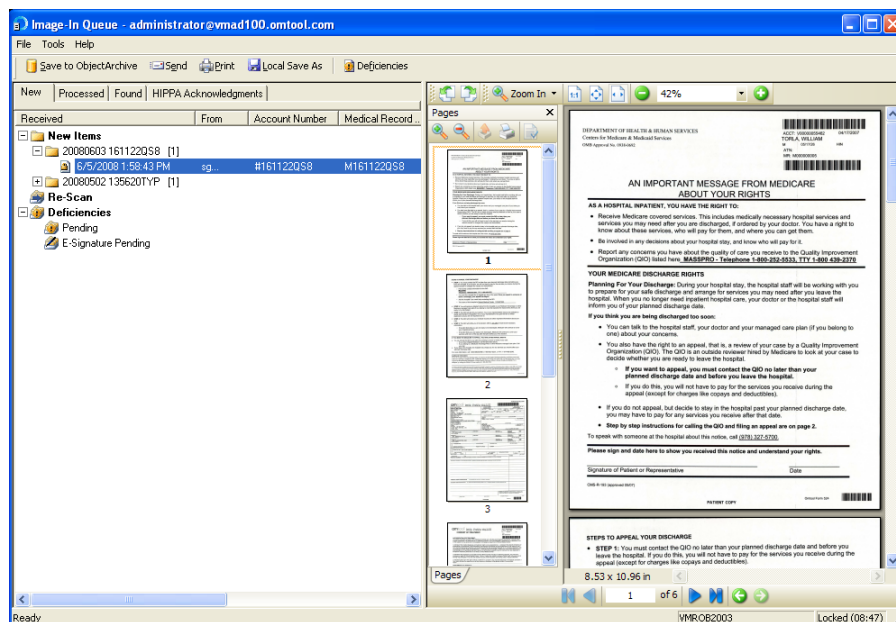
### Figure 4-M: View in IIQ

In the Image-In Queue software, the file displays under New Items (file name ending in QS given previously in the Image-In Acquisition tool). Notice the (1) next to the file number, indicating where the file currently is.



### Figure 4-N: View

Click on the document in the Item View pane to view it in the PDF viewer.



At this point, you can send the whole document to a recipient, who may choose to print it, save the document on your computer or save it to the database and the Processed area.

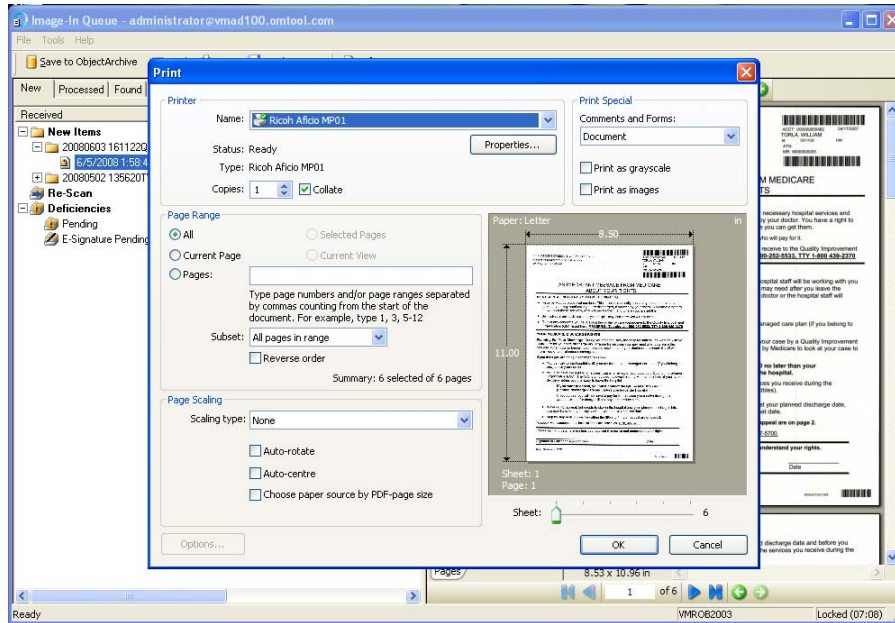


# Print

You or the recipient may need to print the document.

## Figure 4-O: Print the Page

Highlight the page and print it. Click on the **PRINTER** icon (or click File>Print or Cntl+P). Check settings. Click **OK**.

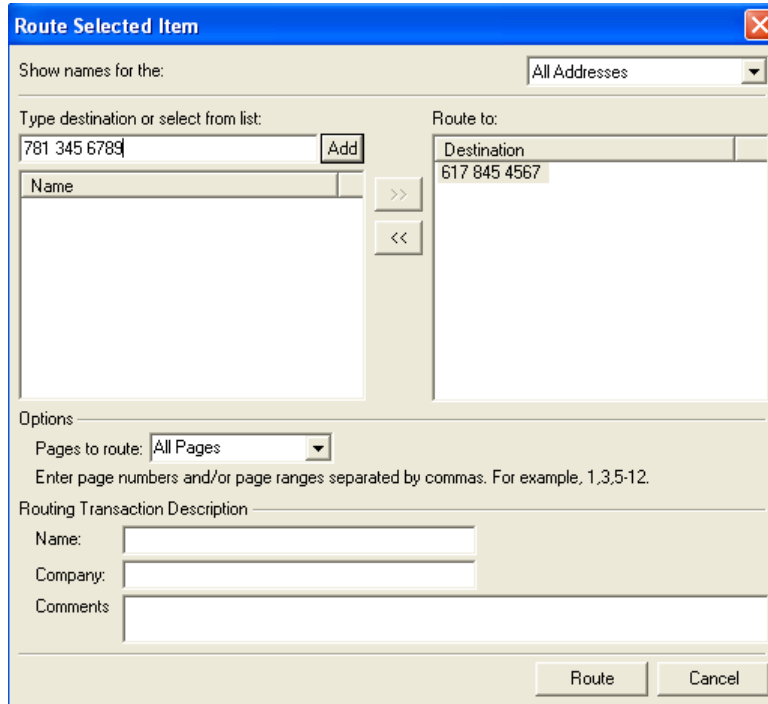


# Send to Recipient

If there is another person who should view the document or give feedback, send the document to the recipient(s)

**Figure 4-P: Send the document**

Click the **SEND** icon (or File>Send or Cntl+E). The **ROUTE SELECTED ITEM** window displays. Type a fax number or E-mail address into the box and click add (or use your company address book). The **ROUTE** button enables. Fill out the relevant information at the bottom of the window, Click **ROUTE**.

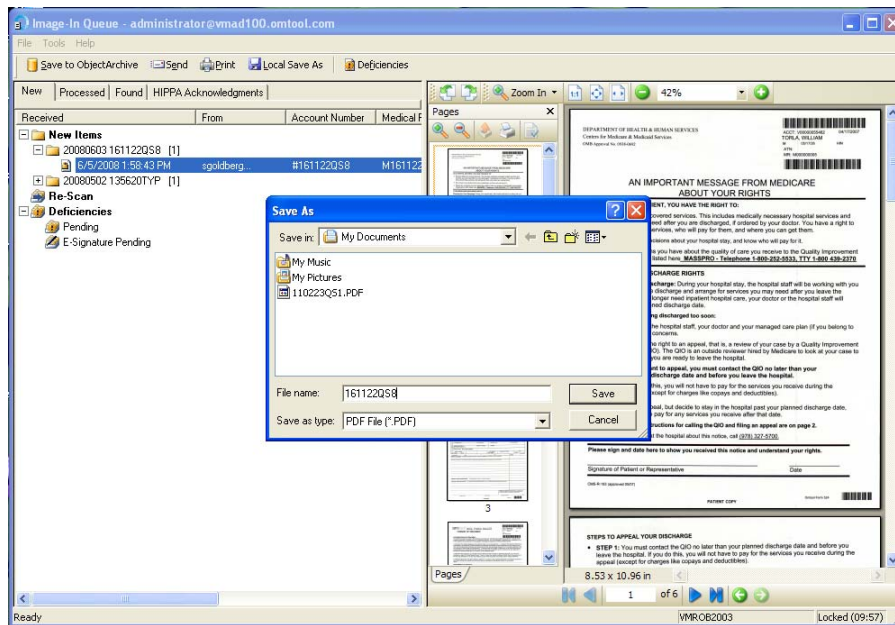


## Save to Your Computer

If you need to keep a copy of the document file, save it to the local hard drive of your computer.

### Figure 4-Q: Save to your computer

Click the **LOCAL SAVE AS** icon (or File>Local Save As or Cntl+L). The **SAVE AS** window displays. If necessary, navigate to the location where you wish to save the file. Type a **FILE NAME** into the box and click **SAVE**. The file is saved to your computer.



## Save to Database and Move to Processed

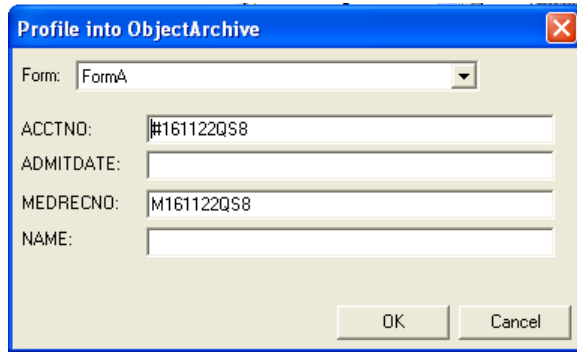
Highlight the folder. Save the folder to the database. The folder is no longer displayed in the IIQ file folder tree.

### Figure 4-R: Save document in database

Click the **SAVE TO...** icon (Object Archive, which is usually your database) or click File > Save to... or Cntl+S. The **PROFILE INTO...** window displays, prompting you to select a form to use for filing purposes. (The information on it can later be used to help search for the document in the database when necessary.)

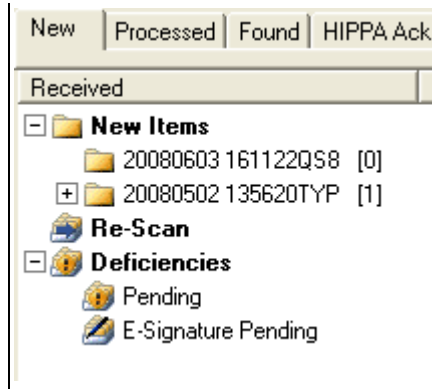
**Figure 4-S: Save document in database**

The **PROFILE INTO....** window displays with the account and medical record numbers you typed previously. Fill in the other information required. Click **OK**.



**Figure 4-T: Save document in database**

The document is saved to the database, where it can be found by doing a search. The file folder displayed under New Items has (0), indicating that the document no longer resides there. (This folder eventually does not display., although there may be some lag time.)



**Figure 4-U: Save document in database**

The file displays in the list under the **PROCESSED** tab.

New			Processed	Found	HIPPA Acknowledgments
Received	From	Routed			
4/28/2008 2:46:22 PM	sgold...	5/1/2008 3:19:42 PM			
4/11/2008 4:11:48 PM	admini...	5/1/2008 3:19:15 PM			
4/21/2008 3:44:42 PM	admini...	5/13/2008 3:31:40 PM			
6/5/2008 1:58:43 PM	sgold...	6/5/2008 5:16:39 PM			
5/1/2008 5:37:09 PM	sgold...	5/1/2008 6:27:17 PM			
4/28/2008 2:46:22 PM	sgold...	5/13/2008 2:31:27 PM			
4/21/2008 3:44:42 PM	admini...	5/13/2008 3:25:18 PM			
4/11/2008 4:13:04 PM	admini...	5/1/2008 2:54:54 PM			
4/11/2008 2:30:58 PM	admini...				
4/11/2008 4:13:23 PM	admini...	5/1/2008 3:18:53 PM			
4/11/2008 2:37:15 PM	admini...	4/11/2008 6:44:04 PM			
4/11/2008 2:39:09 PM	admini...	5/1/2008 3:18:35 PM			
5/13/2008 1:20:05 PM	sgold...	5/13/2008 6:00:01 PM			
5/1/2008 6:05:15 PM	admini...				
4/18/2008 5:38:14 PM	admini...	5/2/2008 3:46:31 PM			
4/30/2008 3:08:49 PM	admini...				
4/23/2008 2:15:27 PM	admini...				
4/18/2008 5:38:14 PM	admini...	5/1/2008 3:20:14 PM			
5/1/2008 12:49:59 PM	sgold...	5/1/2008 2:25:05 PM			
5/5/2008 12:10:52 PM	sgold...	5/5/2008 3:20:09 PM			
6/5/2008 11:58:10 AM	admini...	6/5/2008 4:51:06 PM			
4/18/2008 6:16:35 PM	admini...	5/1/2008 3:15:47 PM			
5/1/2008 2:00:03 PM	admini...				
6/5/2008 11:58:10 AM	admini...	6/5/2008 4:51:34 PM			
4/21/2008 3:44:41 PM	admini...	5/13/2008 3:32:21 PM			
4/11/2008 4:11:08 PM	admini...	5/1/2008 3:17:22 PM			
5/5/2008 2:34:40 PM	admini...				
6/5/2008 11:58:10 AM	admini...	6/5/2008 4:52:11 PM			
4/28/2008 2:46:22 PM	sgold...	5/1/2008 2:28:33 PM			
4/21/2008 3:44:42 PM	admini...	5/1/2008 2:55:32 PM			



# Section 5: Quick Start Tutorial #2

This section includes:

An example of a typical workflow process with a document missing essential information.

This document uses 2 components of the Omtool Healthcare Suite, which work with one another to help you scan, process and file your documents:

- Image-In Acquisition tool
- Image-In Queue (IIQ)

## A Typical Workflow

This workflow demonstrates how to work with a document that is missing some required information.

## Quick Start Tutorial #2

This tutorial covers:

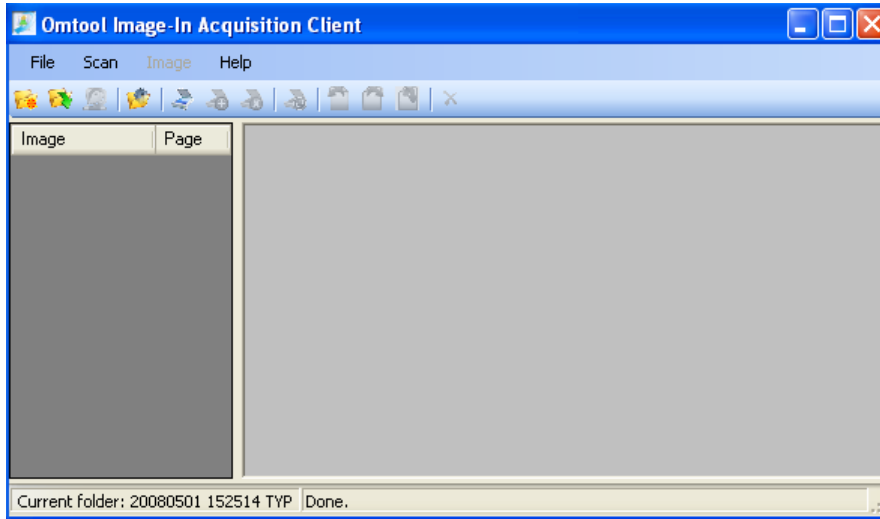
- ▶ Scanning a document into IIQ to view it
- ▶ Marking one page with missing information
- ▶ Rescanning the page with missing information
- ▶ Resolving the missing information
- ▶ Filing the document in the database

## Scan and View

You use your scanner to scan hard-copy documents into the system, using the Omtool Image-In Acquisition Tool software. The electronic document is sent to Image-In Queue (IIQ) where it displays in a numbered file folder. Notice that the file folder has content, indicated by (1). You can view the document image by clicking on its folder, which displays under New Items.

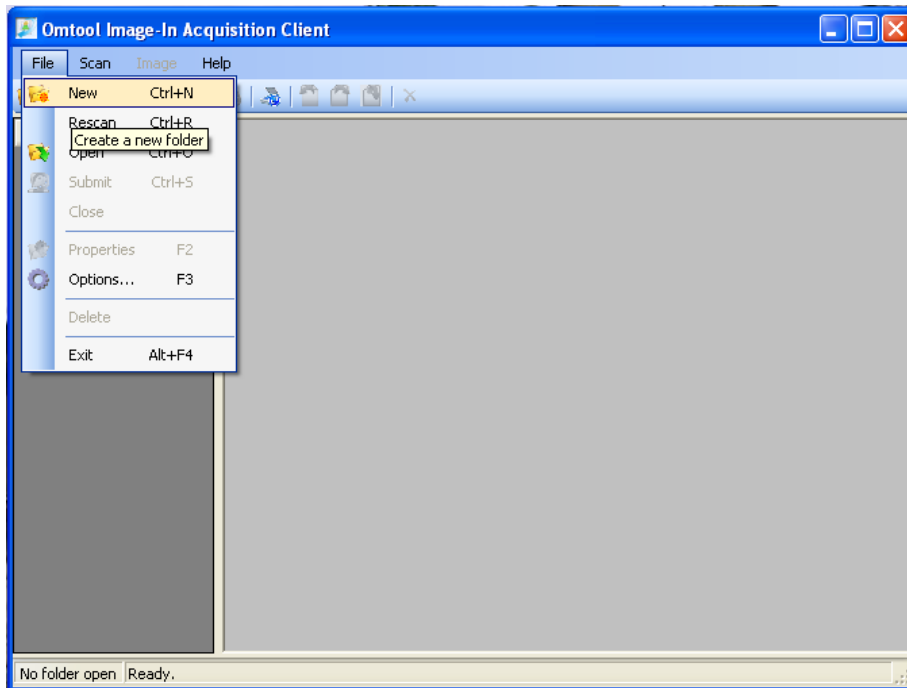
**Figure 5-A: Scan**

Open the Omtool Image-In Acquisition Tool client program.



**Figure 5-B: New Folder**

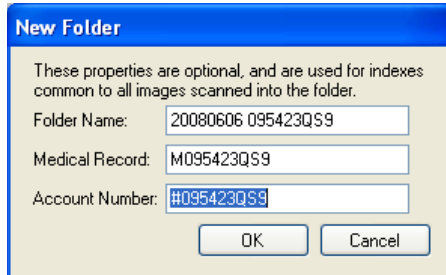
Create a new numbered file folder.





**Figure 5-C: New folder**

A folder number is automatically generated. Type in the Medical Record and Account Number. (For this example, the file number given ends in QS, which displays later in Image-In Queue to help follow the sample process.)



The dialog box titled "New Folder" contains the following text and fields:

These properties are optional, and are used for indexes common to all images scanned into the folder.

Folder Name:

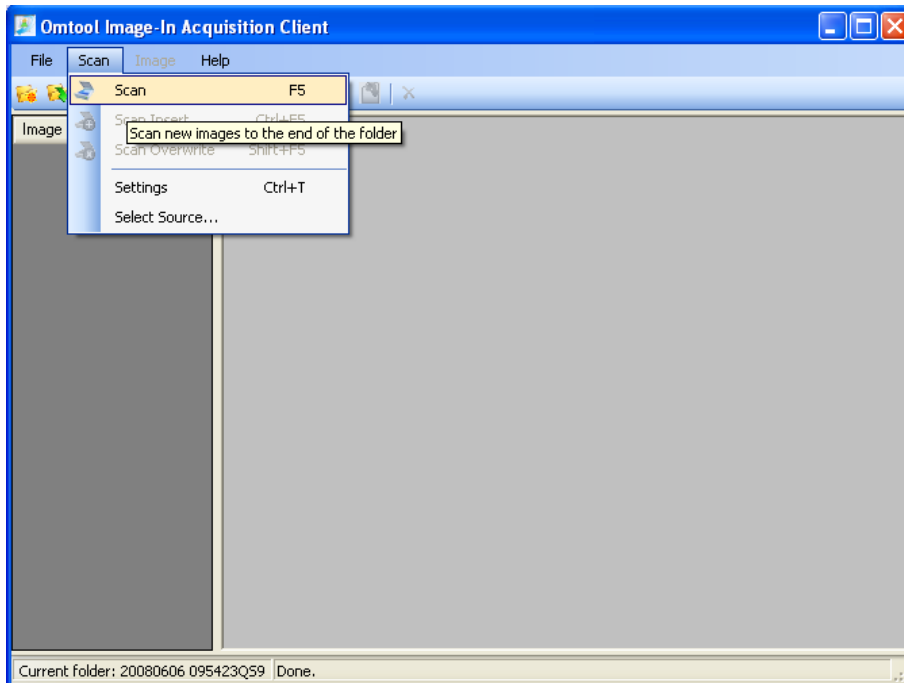
Medical Record:

Account Number:

Buttons: OK, Cancel

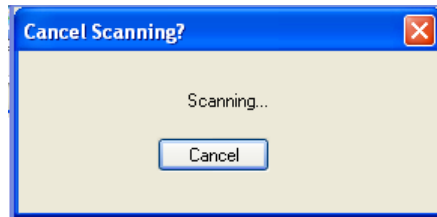
**Figure 5-D: Scan**

Put all the pages of the document into the scanner. Click **Scan>Scan**. The example here is a 6 page document.



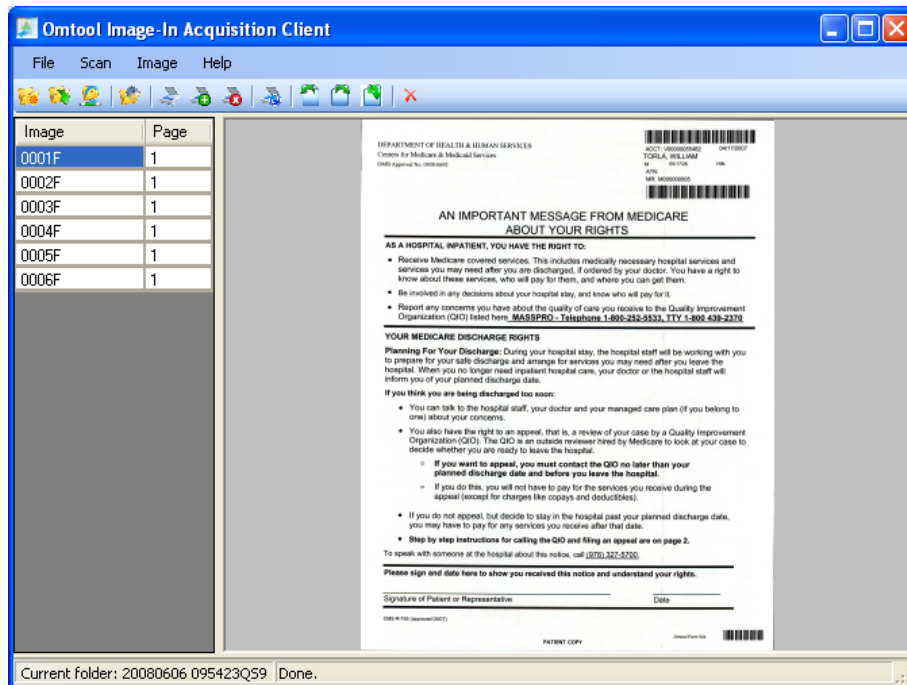
**Figure 5-E: Scanning**

The Image-In Acquisition Tool software scans the document.

**Figure 5-F: View**

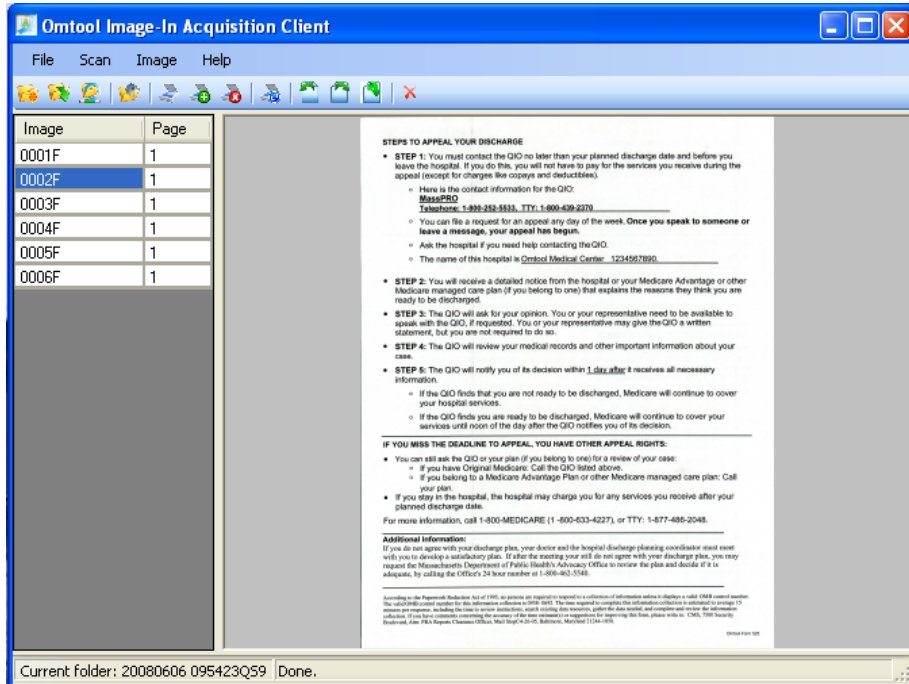
The pages are all visible in the Image Viewer, in the order in which they were scanned. Click on each page number on the left to see the image in the right pane. Notice that each of the 6 one-sided pages is separate, indicated by the "I" next to each page. The "F" indicates that a page is the front of the hard copy document page.

*Tip* The Image-In Acquisition Tool does scan double-sided pages as well. Click the Double-Sided icon on the Toolbar before following the procedure above. The back side of the page is indicated by a "B".



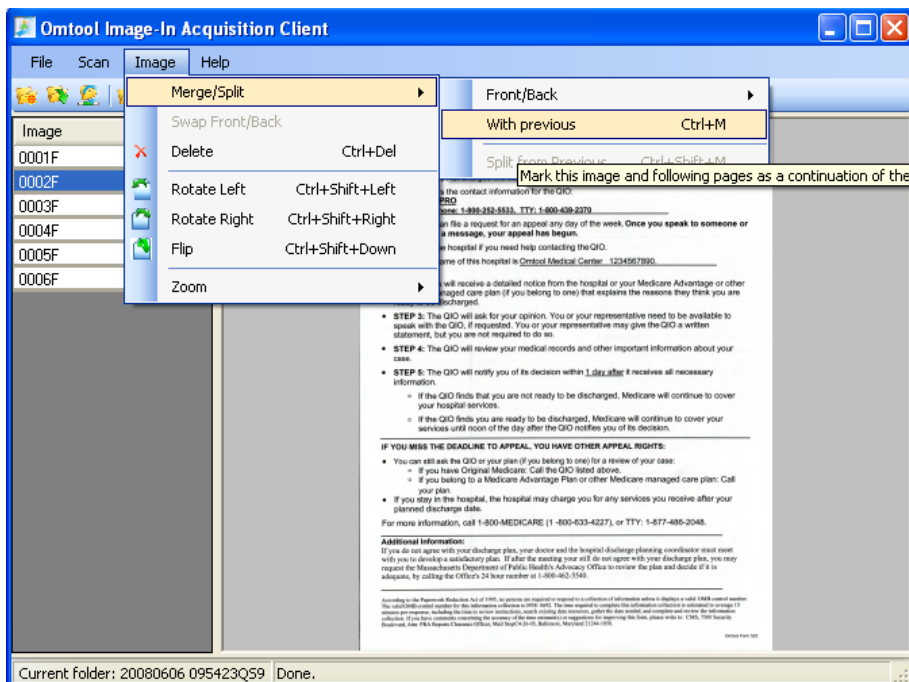
**Figure 5-G: Merge**

Merge the second page with the first, to begin combining the single pages into one document. Highlight the second page.



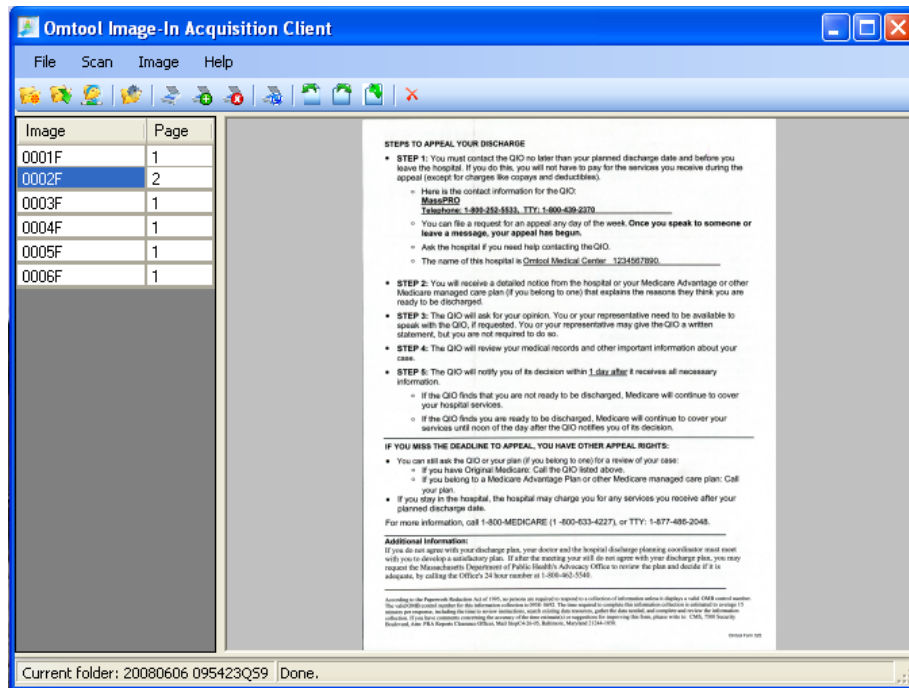
**Figure 5-H: Merge**

Click **Image>Merge/Split>With previous**.



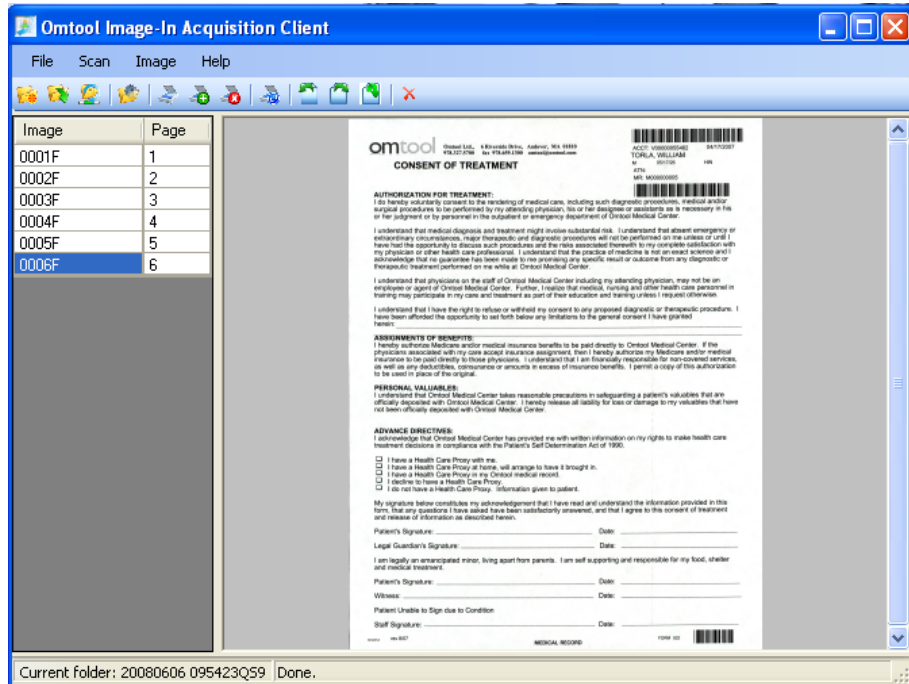
## Figure 5-1: Merge

The second page is now part of one document with the first page, as indicated by the Page 2.

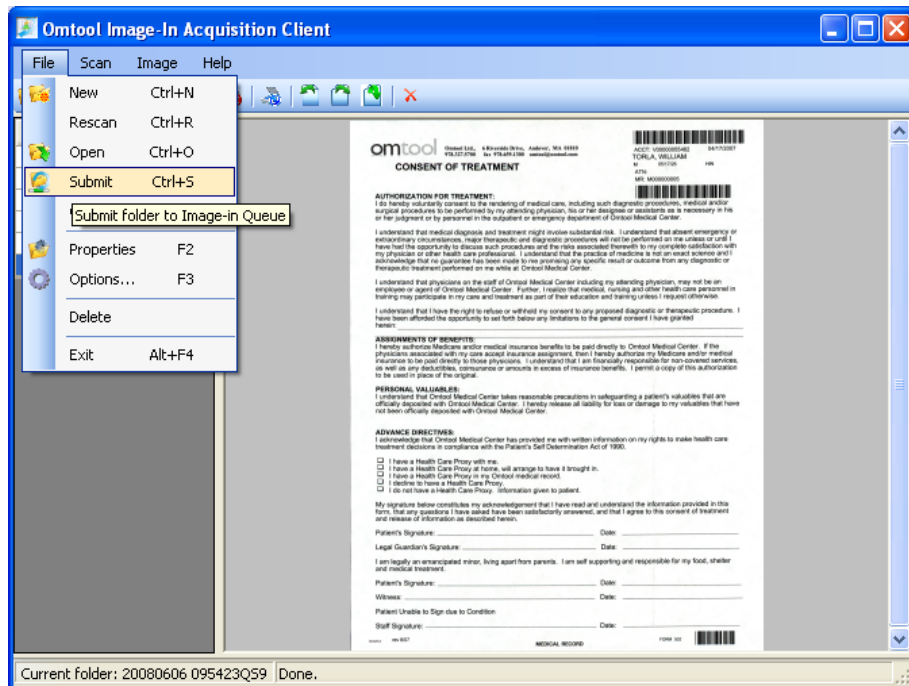


**Figure 5-J: Merge**

Repeat the process for the remaining single pages, until they are all merged into one document, as indicated by the page numbers 1 through 6.

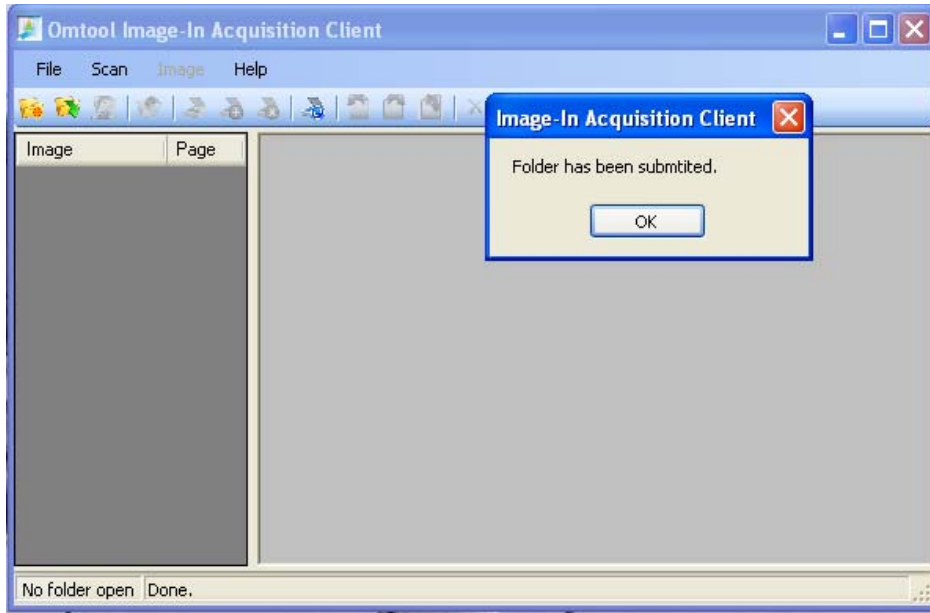
**Figure 5-K: Submit**

Click **File>Submit** to send the document folder to Image-In Queue for processing.



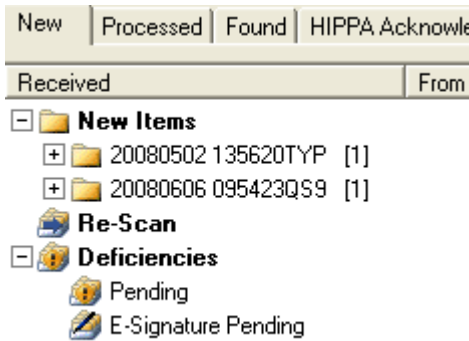
**Figure 5-L: Submit**

The Image-In Acquisition software confirms the file folder has been sent to IIQ.



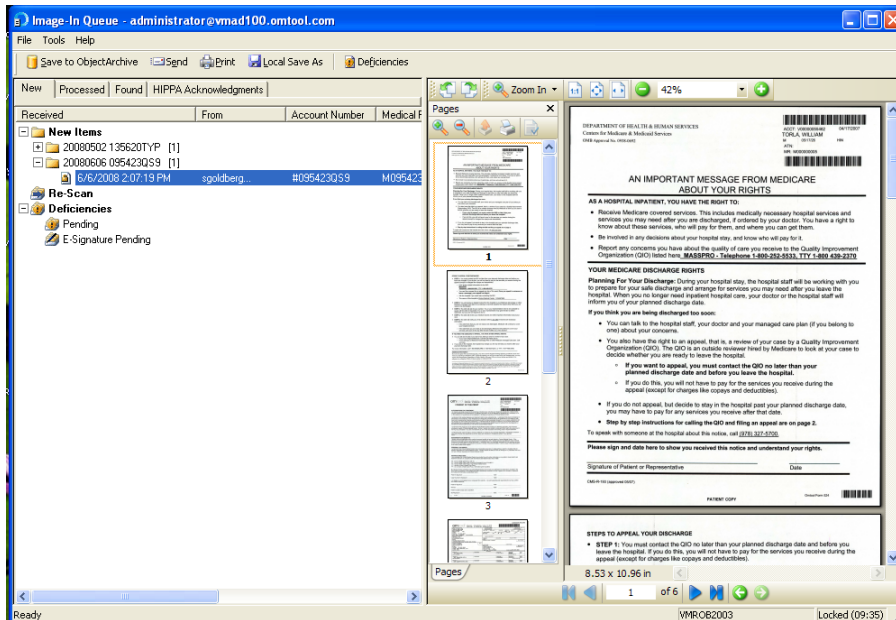
**Figure 5-M: View in IIQ**

In the Image-In Queue software, the file displays under New Items (file name ending in QS given previously in the Image-In Acquisition tool. Notice the (1) next to the file number, indicating where the file currently is.).



**Figure 5-N: View**

Click on the document in the Item View pane to view it in the PDF viewer.



At this point, you can route a page (to a recipient who can supply missing information) or send the whole document to a recipient, move the document to the Processed area or save it to the database.

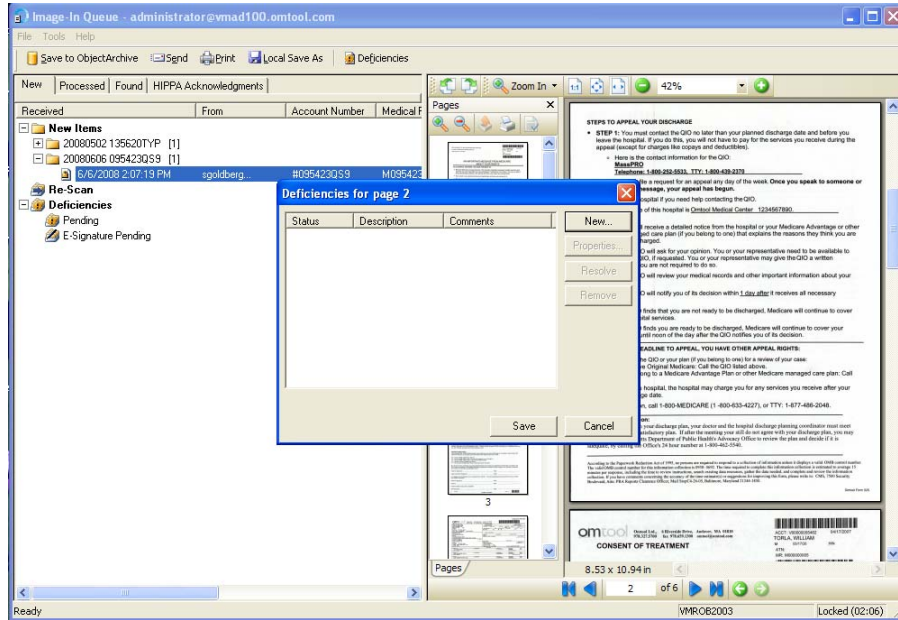
## Mark for follow-up

A page is missing some information. Mark this page for follow-up. For missing information, a separate routing cover sheet is created automatically and used to track each page. The folder is also now displayed under Pending. Notice the file folder where the document currently is indicates contents by the (I).

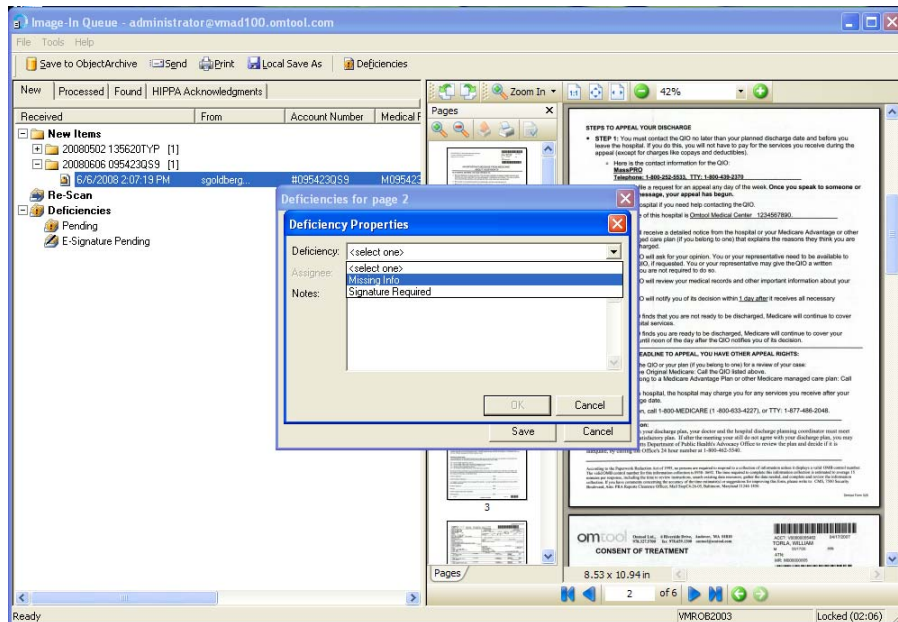
## Section 5: Quick Start Tutorial #2

**Figure 5-O: Flag Missing Information**

When information is missing from the document file, highlight the relevant page. Click on the **DEFICIENCIES** icon. The **DEFICIENCIES FOR PAGE "X"** window below displays. Click **NEW**.

**Figure 5-P: Flag Missing Information**

The Deficiencies Properties window below displays. Choose **MISSING INFO** (the default for demo purposes. The choices for categories of missing information may be customized for your location by your Document Administrator and may vary.)

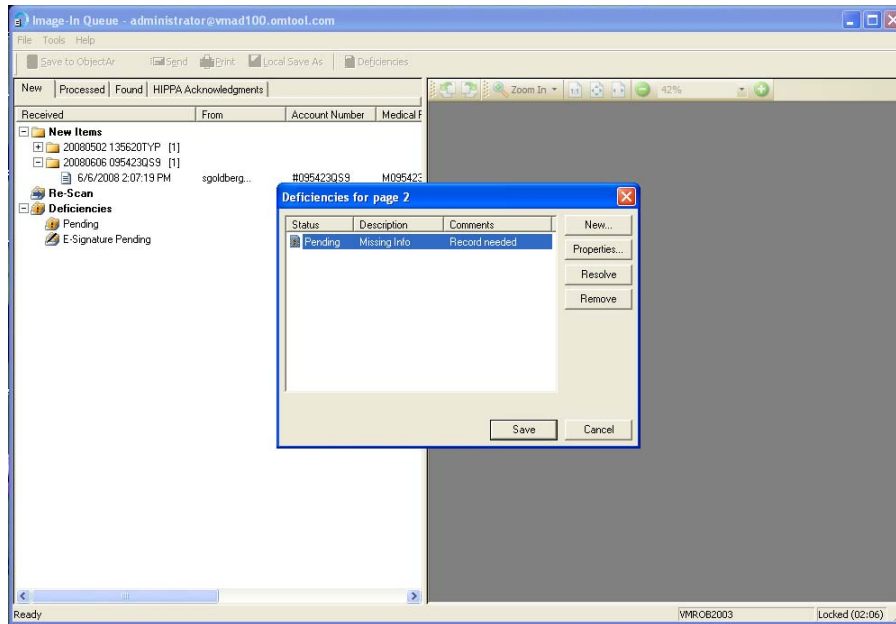




### Figure 5-Q: Flag Missing Information

Type any notes or comments, for example, the details of the missing information. Click **OK**.

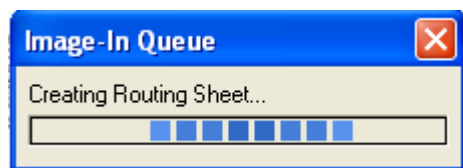
The missing information is noted as Pending on the Deficiencies for that page. Click Save.



### Figure 5-R: Flag Missing Information

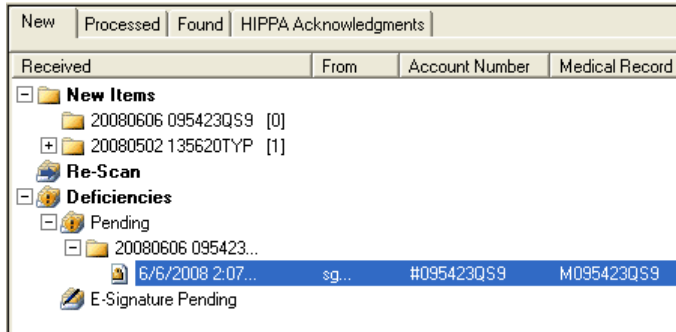
A Routing Sheet is automatically created, as noted in the window that displays, for the page with missing information. The Routing Sheet, with the image of the flagged page, prints. (See Figure I-Y for image.)

**Note** Note: If more than one page is flagged as having missing information, a separate Routing Sheet is created for each page.



### Figure 5-S: Flag Missing Information

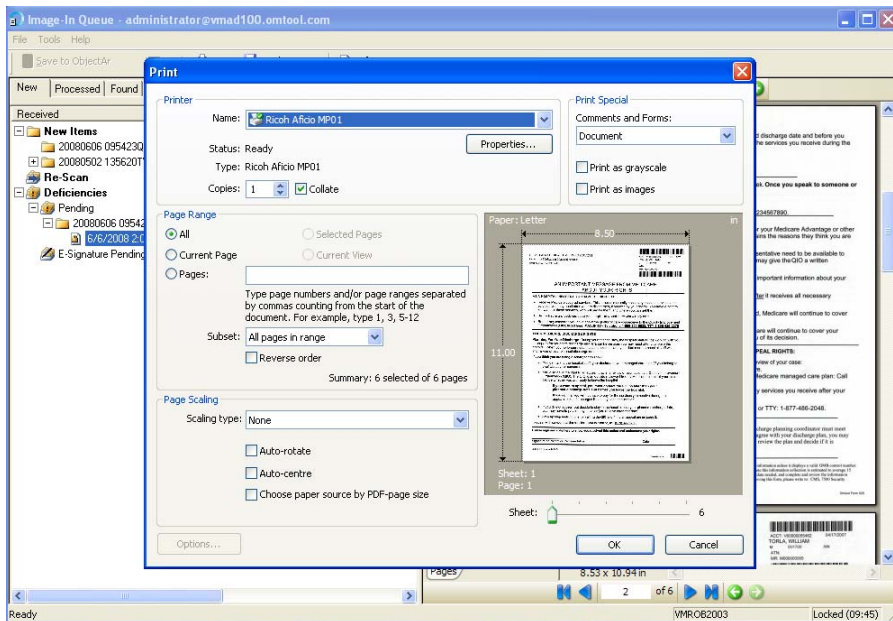
The document file folder now displays in the Item View pane under Deficiencies/Pending, as well as New Items. Note that the number in parentheses after the file name under Deficiencies/Pending indicates the location of the file after the last completed step.



The information flagged as missing now has to be supplied, either by you or another staff member. You may print the page with the missing information and deliver it by hand, E-mail or fax it and let the recipient print it.

### Figure 5-T: Print the Page

Highlight the page and print it. Click on the **PRINTER** icon (or click File>Print or Cntl+P)



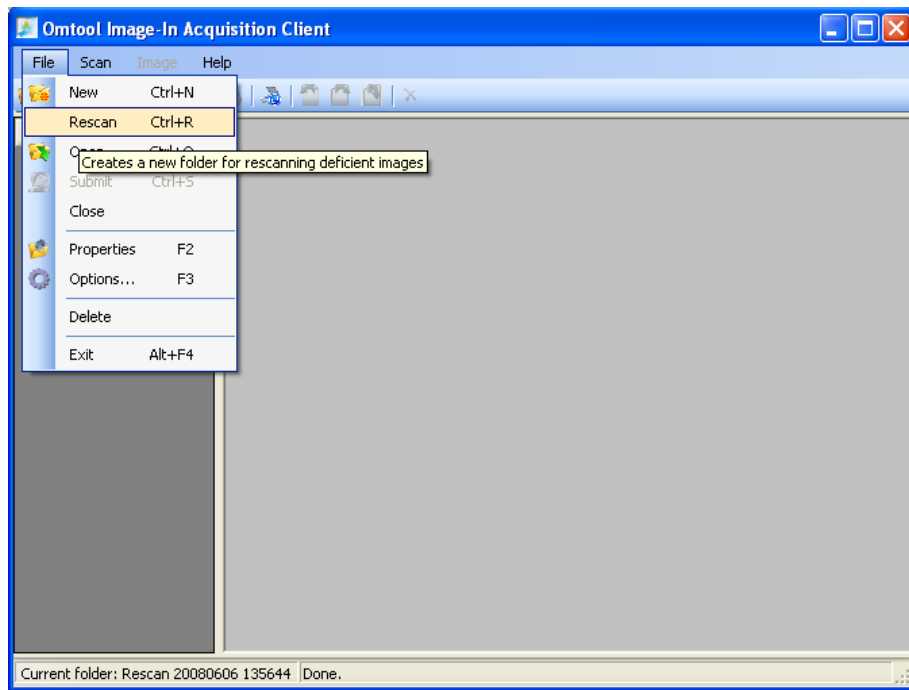
## Rescan and Resolve

When the missing information is supplied, print and rescan the Routing Sheet and its accompanying, updated page. The pages can be seen in the Omtool Image-In Acquisition Tool software. When you submit the page and Routing Sheet to IIQ, the folder is now also displayed under Rescan. Notice that the Rescan file folder has contents (1)

In IIQ under Rescan, click on the file. A message displays indicating that the page is being replaced into the original document file. The Deficiencies window for marking the missing information automatically displays, prompting you to Resolve the deficiency. Resolve the deficiency. Notice where the “live” file is located; the Rescan file folder is empty (0), the file number also displays in Processed and the file folder displays (1) under New Items.

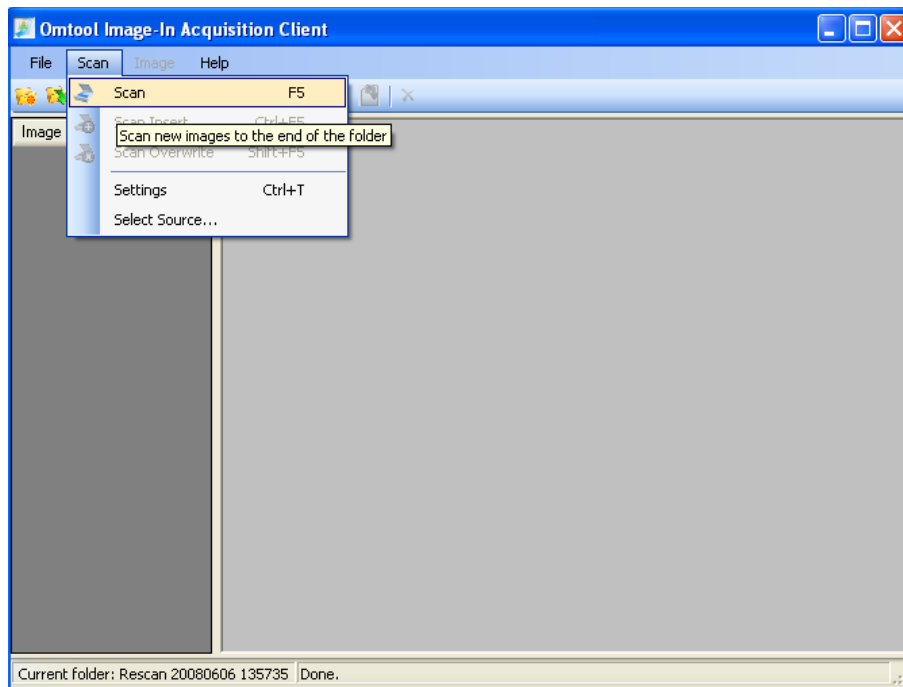
### Figure 5-U: Rescan the page

In the Image-In Acquisition tool, rescan the updated page. Place the document in the scanner. Click **File**> **Rescan**.



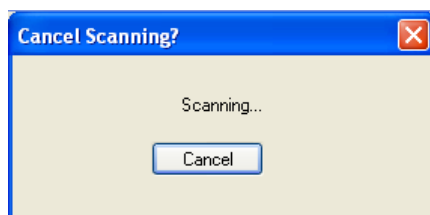
### Figure 5-V: Rescan the page

Click **Scan>Scan**.



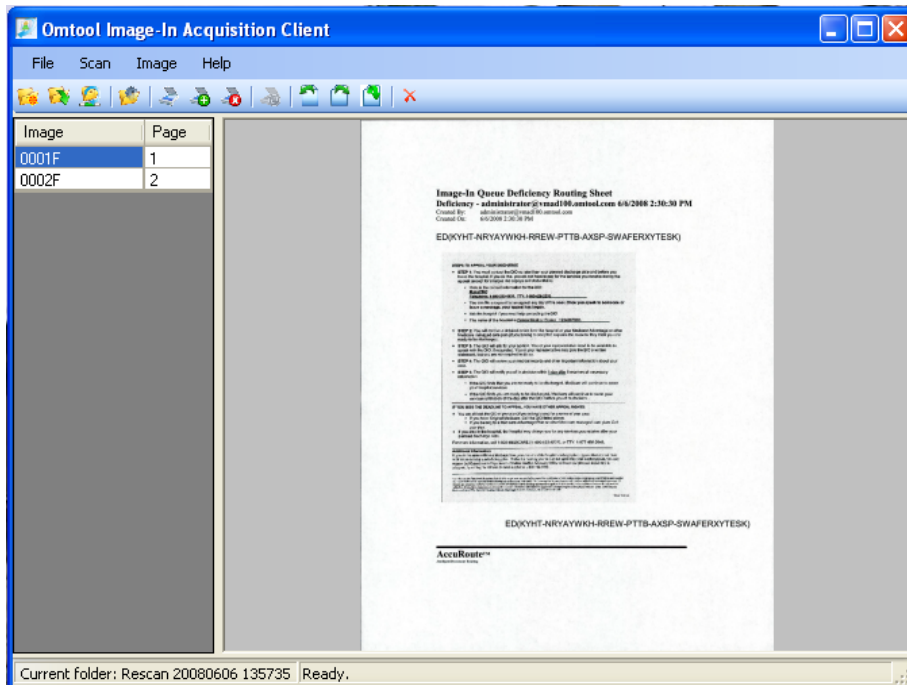
### Figure 5-W: Rescan the page

The Image-In Acquisition Tool software scans the document.

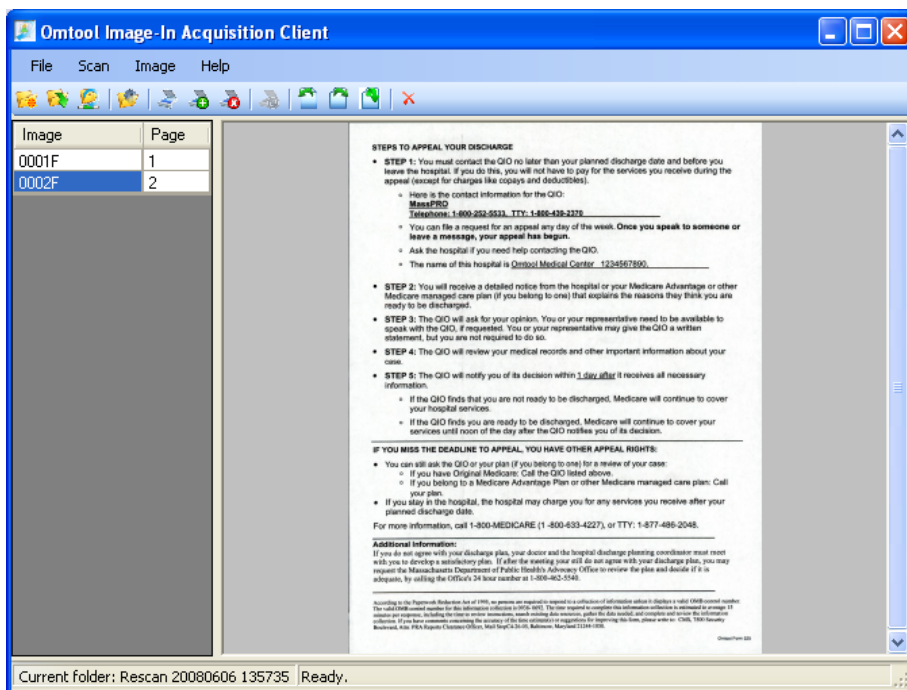


**Figure 5-X: Rescan the page**

The Routing Sheet that was generated displays as Page 1.

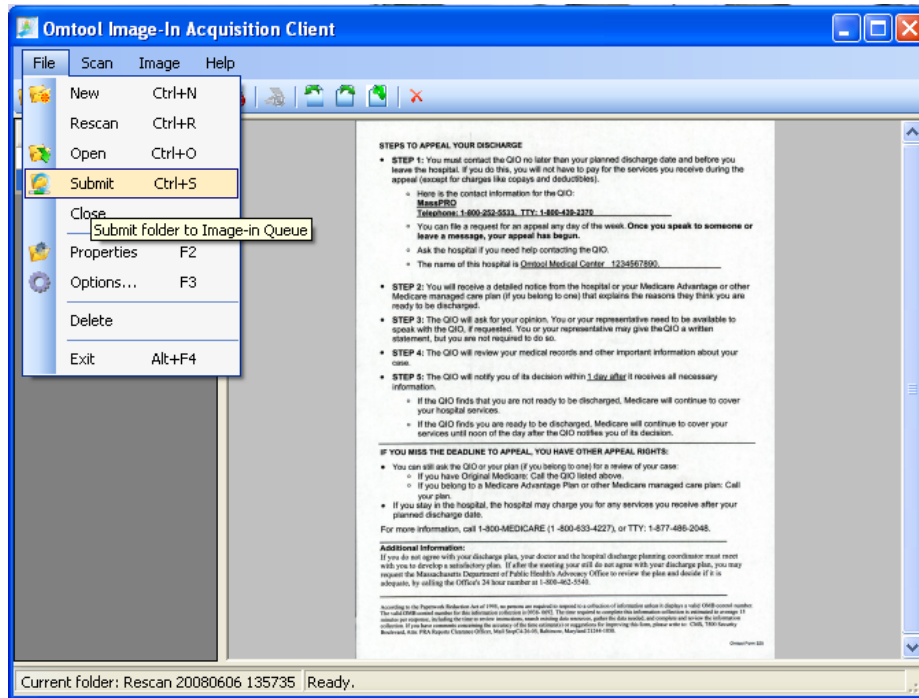
**Figure 5-Y: Rescan the page**

The updated document page displays as Page 2.



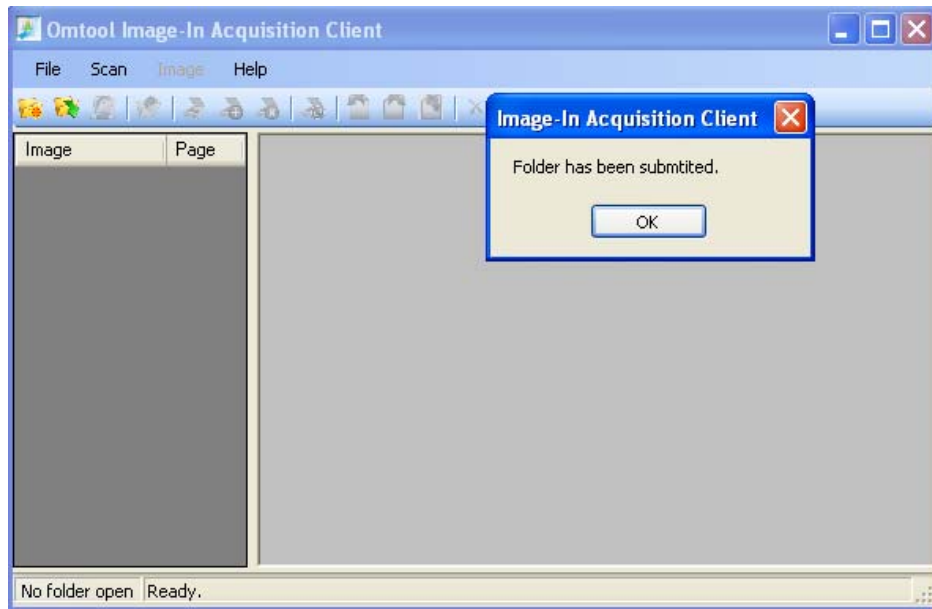
**Figure 5-Z: Submit the rescanned the page**

Click **File> Submit** to send the document to IIQ.



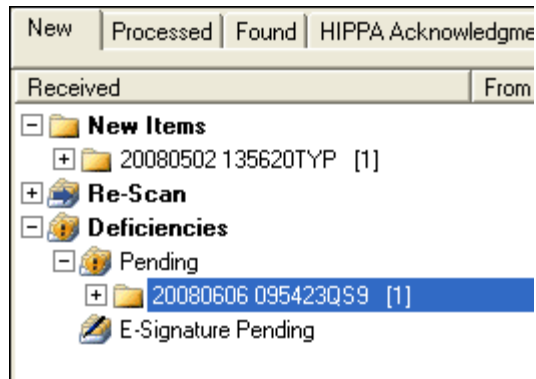
**Figure 5-AA: Rescan the page**

The Image-In Acquisition tool confirms that the document has been sent to IIQ.

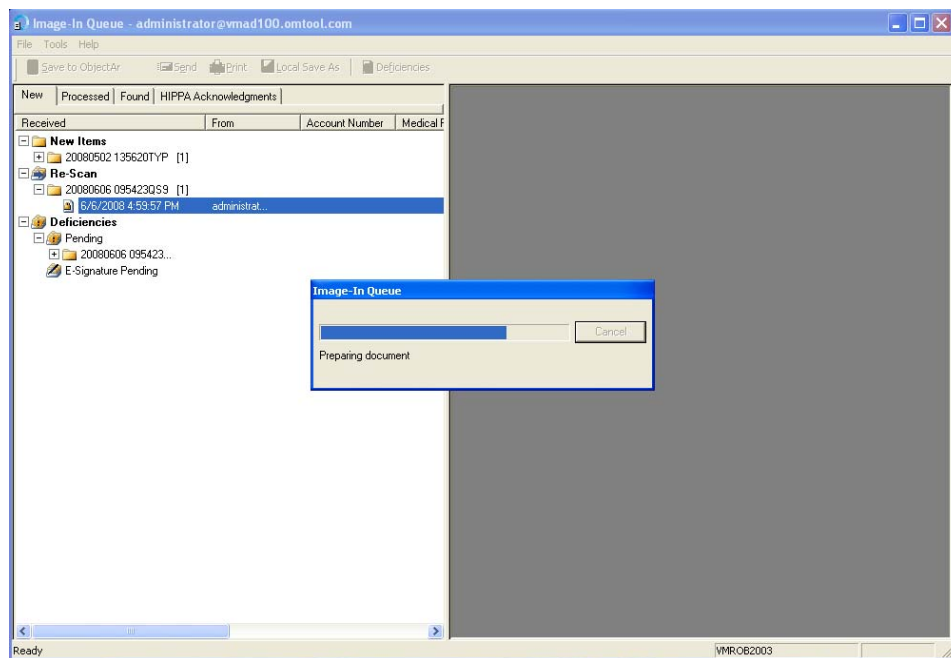


**Figure 5-AB: View in IIQ**

The document displays in Image-In Queue, in a folder under Rescan.

**Figure 5-AC: View in IIQ**

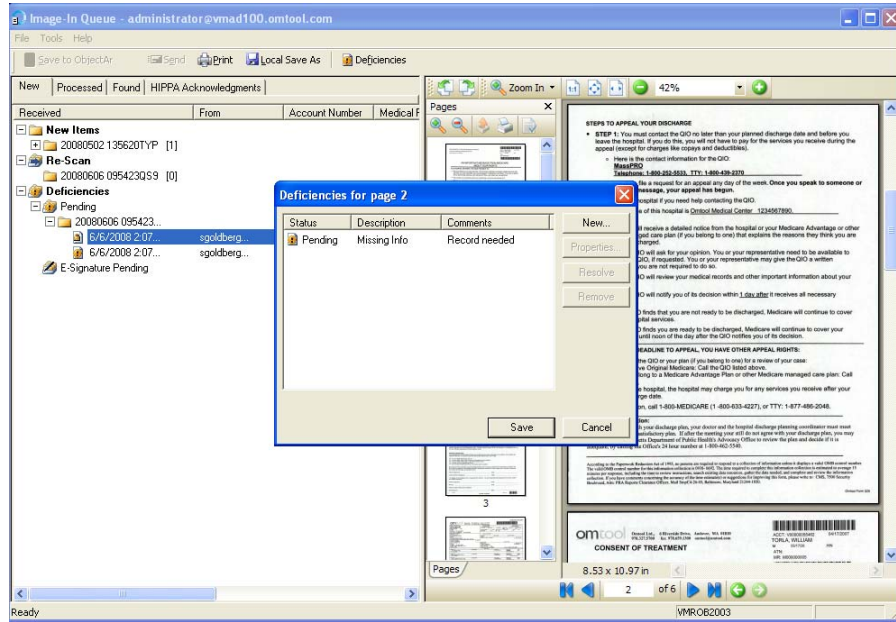
Click on the file in the folder under Rescan in order to view the updated document in the PDF Viewer. IIQ displays a window indicating that the original image is being prepared to be replaced with the updated one.



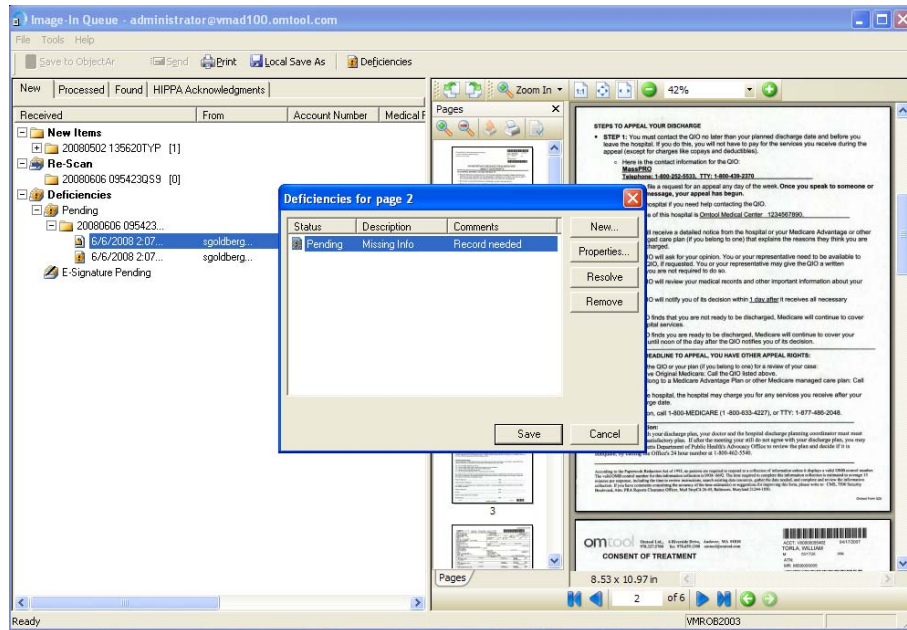
## Section 5: Quick Start Tutorial #2

**Figure 5-AD: Resolve missing information**

The Deficiencies window for that page displays automatically to prompt you to resolve the deficiency. Note that only the New button is enabled.

**Figure 5-AE: Resolve missing information**

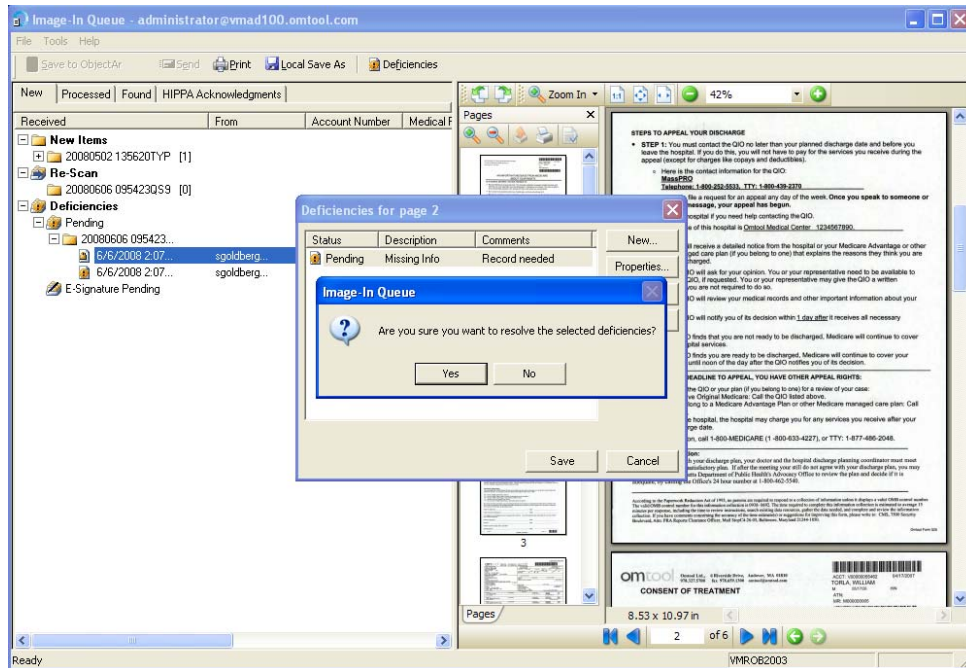
Highlight **PENDING**. The buttons are all enabled.





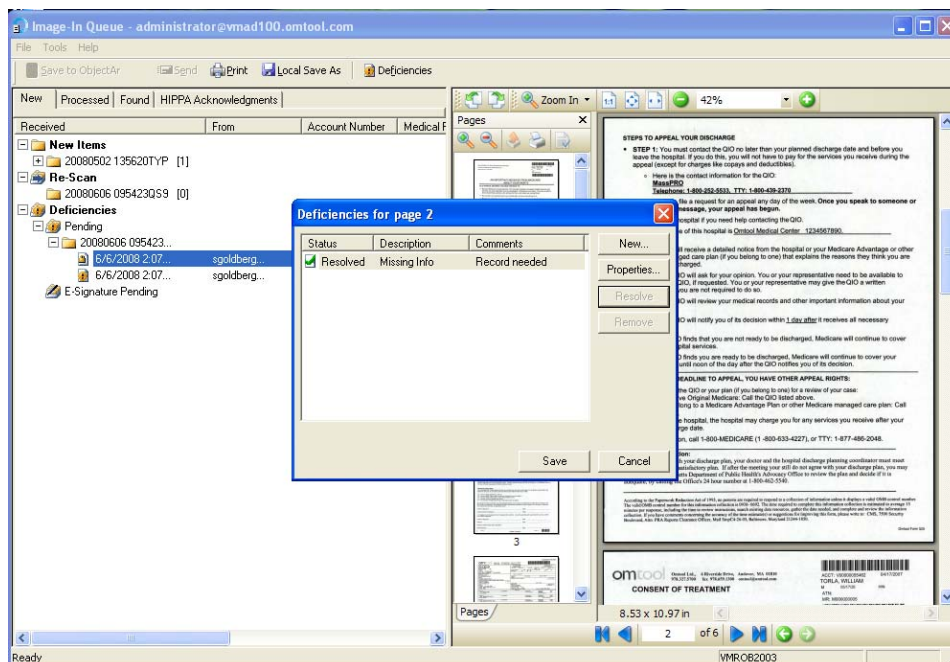
### Figure 5-AF: Resolve missing information

Click on the **RESOLVE** button to indicate that the missing information has been supplied. The confirmation window displays. Click **YES**.



### Figure 5-AG: Resolve missing information

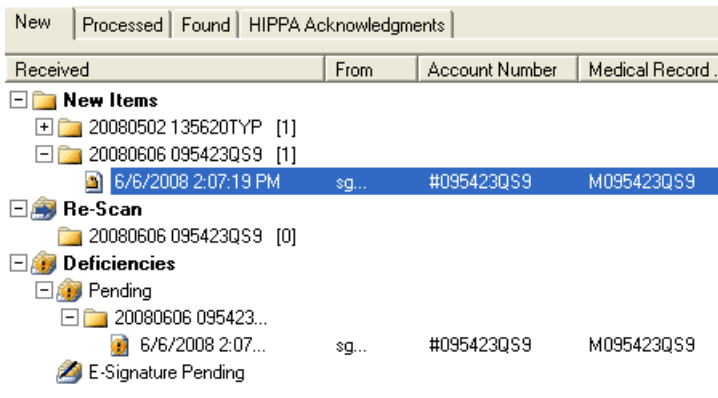
The Deficiencies window for that page indicates that the missing information has been resolved. Click **Save**.



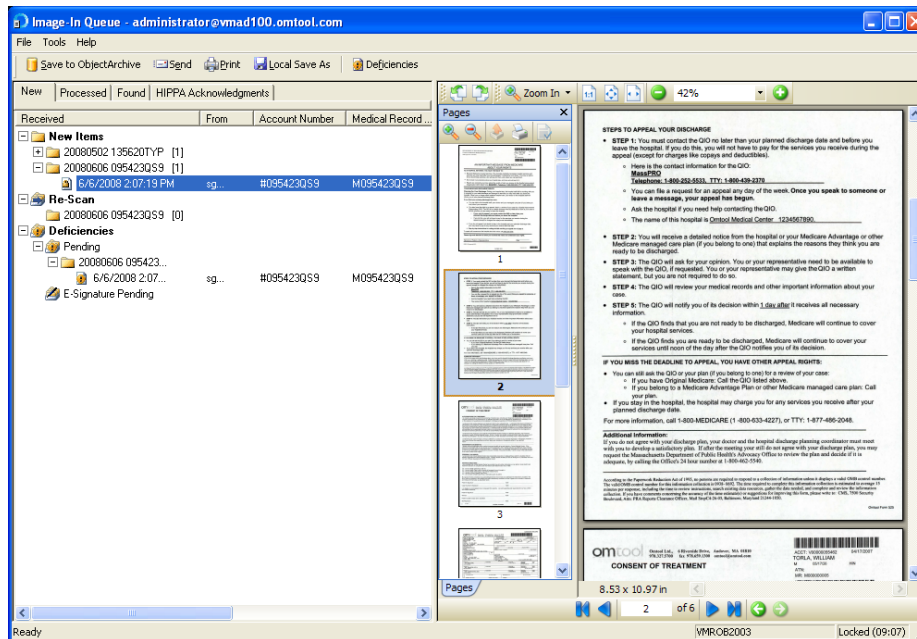
## Section 5: Quick Start Tutorial #2

**Figure 5-AH: Resolve missing information**

The file folder displays under New Items.

**Figure 5-AI: Resolve missing information**

The updated document can be viewed in the PDF Viewer.



## Save to Database

Highlight the folder. Save the folder to the database. The folder is no longer displayed in the IIQ file folder tree.

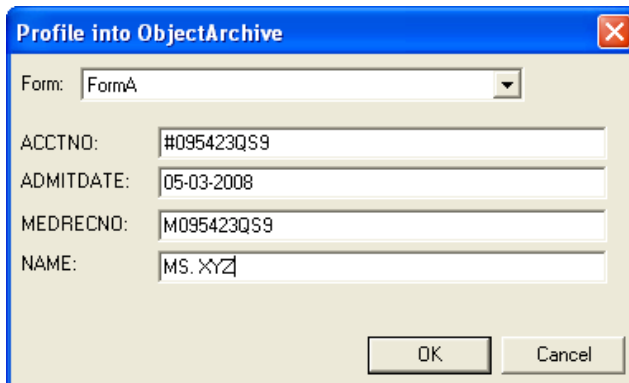
### Figure 5-AJ: Save document in database

With the document highlighted, click Save to Object Archive. The Profile into...window displays. Click in the drop-down box to choose the style of form to use. (The form may be specified by your Document Administrator.) Click OK.



### Figure 5-AK: Save document in database

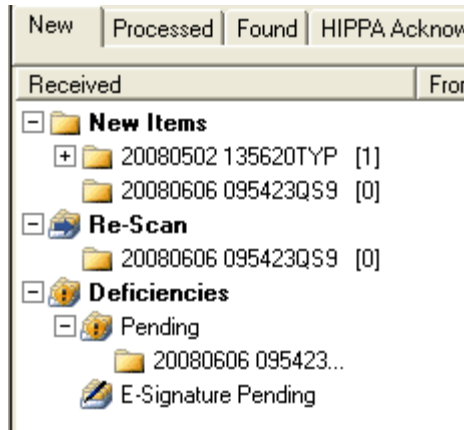
The Profile into...window displays with the account and medical record numbers you typed previously. Fill in the other information required. Click OK.



## Section 5: Quick Start Tutorial #2

**Figure 5-AL: Save document in database**

The file folder displayed under New Items has (0), indicating that the document no longer resides there.

**Figure 5-AM: Save document in database**

The file is now displayed in the list under the Processed tab.

