
Image-In™ Business - Scan and Index user guide

For Omtool™ Healthcare Suite

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Section I: Introduction

This guide contains instructions on using the Image-In Business - Scan and Index applications.

This section includes:

[Image-In Business - Scan and Index](#) (I-1)

[About this guide](#) (I-1)

[Related documentation](#) (I-2)

Image-In Business - Scan and Index

Image-In Business - Scan and Index are two separate components that work together to manually transform and organize paper and electronic documentation into images for long-term archive and future retrieval.

Operators use the Scan application to collect documentation from multiple media sources, such as paper, CD, DVD, magnetic disc, SAN/WAN, etc. into BDIS system folders and prepare them for organization and indexing. Operators then use the Index application to index and organize images into unique single or multi-page documents and associate indexing values to each page that will be used later in locating and retrieving them from archive.

Document organization and indexing can be manually entered by users or, far more rapidly and accurately, automatically "Key Linked" with batch and/or account data transmitted from the existing HIS (hospital information system).

About this guide

The intended audience of this guide are the Image-In Business - Scan and Index operators.

Most operator actions are intuitive and self-evident. This document describes general operation for the first-time user, and provides guidance for unusual situations that may arise.

Here is what the different sections of this guide has to offer:

- [General operator instructions](#) (2-1) describes how to launch Image-In Direct Capture.
- [Scanning](#) (3-1) describes how to scan a document image.
- [Archiving captured data](#) (4-1) described how to index captured data for archiving purposes.
- [Working with images](#) (5-1) describes the image editing capabilities the operator can use when capturing or indexing data.
- [Troubleshooting](#) (6-1) describes some common problem scenarios and how to troubleshoot them.

Related documentation

All documentation

Section 2: General operator instructions

This section includes:

[Launching the Scan and Index application](#) (2-1)

[The BDIS Folders](#) (2-1)

[Creating a BDIS folder](#) (2-2)

[Opening an existing BDIS folder](#) (2-3)

[Configuring scan settings](#) (2-3)

Launching the Scan and Index application

The Image-In Business - Scan and Index applications are installed and configured in the operator workstations by the System Administrator.

A secure user name and password are required when launching either the Scan or the Index application. The user name is used to record transactions and error conditions as well as determine the appropriate access privileges.

Note All user names and passwords are case-sensitive.

The BDIS Folders

Before the operator can begin any work, the operator must either create a new or open an existing BDIS folder. All scanned images and related indices will be placed into this folder.

Important The operator can only create folders from within the Scan application.

BDIS folders are identifiable and unique to the capture components by being given a folder name, folder date and departmental designation. The system will prevent folders from being created with an identical name and date within a department. The departmental designation is defined by the department name selected in the department selection drop-down list while the user specifies the folder name and date.

BDIS Folder Profiles and Application Settings


Attributes that define the behavior of BDIS folders are grouped together into logical profiles. There are two profiles used by both the scan and index applications; Scan and Workflow. Each profile is defined for the folder by users from within the Scan application.

As the name implies, the scan profile is used to define the way images are scanned into the folder, e.g. paper size, simplex/duplex scanning, resolution, etc. Scan profiles are helpful in that they provide users with the ability to quickly change scanner settings as is most appropriate for the current job. Scan profiles can be defined with specific imaging devices in mind, for particular paper types, for correspondence from individual vendors, etc.



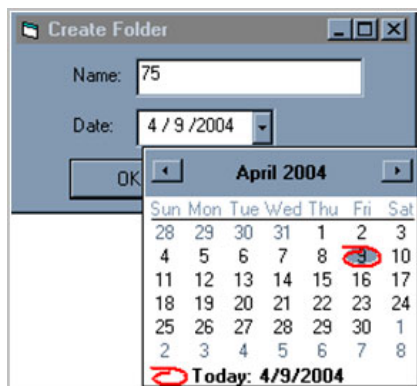
Creating a BDIS folder

To create a new folder for scanning:

- 1 Click the **NEW** button from the main application window, select the **OPEN FOLDER** option from the **SCAN** menu or click the **OPEN FOLDER** icon on the toolbar  and clicking the **NEW** button from the select folder window.



- 2 Click **NEW** to open **Create Folder** dialog.
- 3 In the **NAME** text box enter the name, and in the **DATE** text box, enter the creation date.



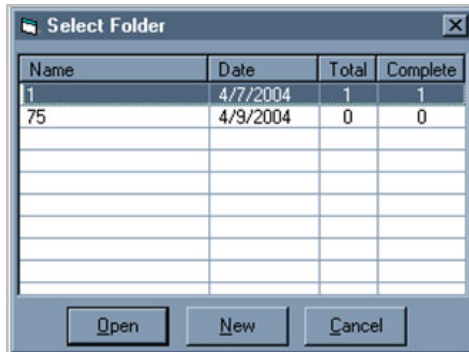
- 4 Click **OK** to create the folder.

Opening an existing BDIS folder

To open an existing folder:

- 1 Select the **OPEN FOLDER** option from the **SCAN** menu or click the **OPEN FOLDER** icon on the toolbar  .

The **Select Folder** dialog opens.




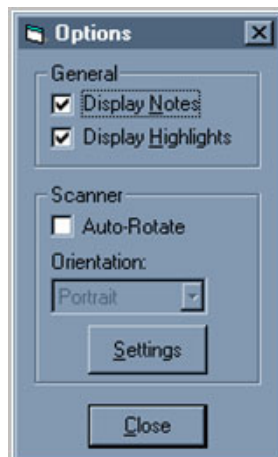
- 2 Either double-click on the BDIS folder that you would like to open or highlight it and press the **OPEN** button to open the folder.

Configuring scan settings

Users can also make more granular "on the fly" scanner configuration changes when required.

To configure scan settings:

- 1 Either select **OPTIONS** item from the **Scan** menu, or click the **OPTIONS** icon on the toolbar  to open the Options dialog.



- 2 Click **SETTINGS** in the Options dialog to open the Settings dialog.



- 3 Make scan configuration changes as needed and click **OK** to continue with scanning.

Section 3: Scanning

This section includes:

[Scanning a document](#) (3-1)

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

Once a BDIS folder has been opened, you can begin capturing documentation images. The Scan application provides two methods for this: Scan and Import.

The scan option, as the name implies, captures documentation through TWAIN compliant document image scanning devices. The import option captures electronic images from disk, such as your hard drive, a network share, CD, DVD, etc.

By default, each image will be defined as an individual single page document when initially captured. Grouping images into multi-page documents is done during the index step. For example, if pages one to fifty of a remittance are scanned in then BDIS will recognize them as fifty, one page documents. Once the BDIS folder containing these images is opened in index, the operator will combine, or merge, all of the images into a single fifty page document or into two, twenty five page documents, etc. There are several ways that this can be accomplished, which are discussed in section

Scanning a document

To scan a document:

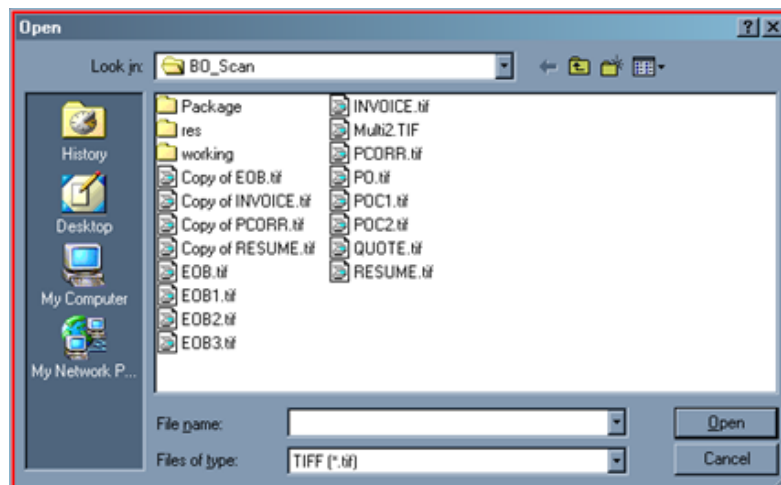
- 1 Organize paper documentation, smooth out any folds, remove staples and/or paperclips and place on the scanner feed tray
- 2 Select the appropriate scan profile to be used and select **SCAN**.
- 3 Review each image to verify quality.
- 4 Select the appropriate workflow profile and select either **SUBMIT** or **CLOSE FOLDER** from the Scan menu.

Submitting the folder will move it forward to the next step of the capture process. Closing the folder will store the folder on the server while keeping it in the scan step of the capture process.

Importing a document

To import a document:

- 1 Make sure the folder from which images are to be imported is accessible
- 2 Select the **IMPORT** button.
- 3 Locate the image(s) that you would like copied into the BDIS folder and select **OPEN**. This opens the Import image selection dialog.



- 4 Review each image to verify quality.
- 5 Select the appropriate workflow profile and select either **SUBMIT** or **CLOSE FOLDER** from the Scan menu.

Submitting the folder will move it forward to the next step of the capture process. Closing the folder will store the folder on the server while keeping it in the scan step of the capture process.

Section 4: Archiving captured data

This section includes:

[Opening Folders for data](#) (4-1)

[Indexing](#) (4-1)

[Manual indexing](#) (4-2)

[KeyLink Indexing](#) (4-4)

Once images have been collected into a BDIS folder, operators will then, if specified by the workflow profile, use the Archive System to group them logically into multi-page documents and apply index values that will enable users of Multiview to locate and retrieve the documents.

Opening Folders for data

After starting the application, make sure the department that the folder was created in is selected and open it by clicking the **OPEN FOLDER** button.

In order to facilitate the simplest and most speedy folder process possible, the application will immediately scan the folder when opened and set the input focus to the first required index value. Basically, users can immediately begin entering data as soon as the folder has been opened.

Indexing

There two methods operators can use to index documentation. The first method involves manually entering the data and the second involves linking the BDIS folder to an HIS journal report.

There are two basic index value types that can be associated with images: required and multi-key.

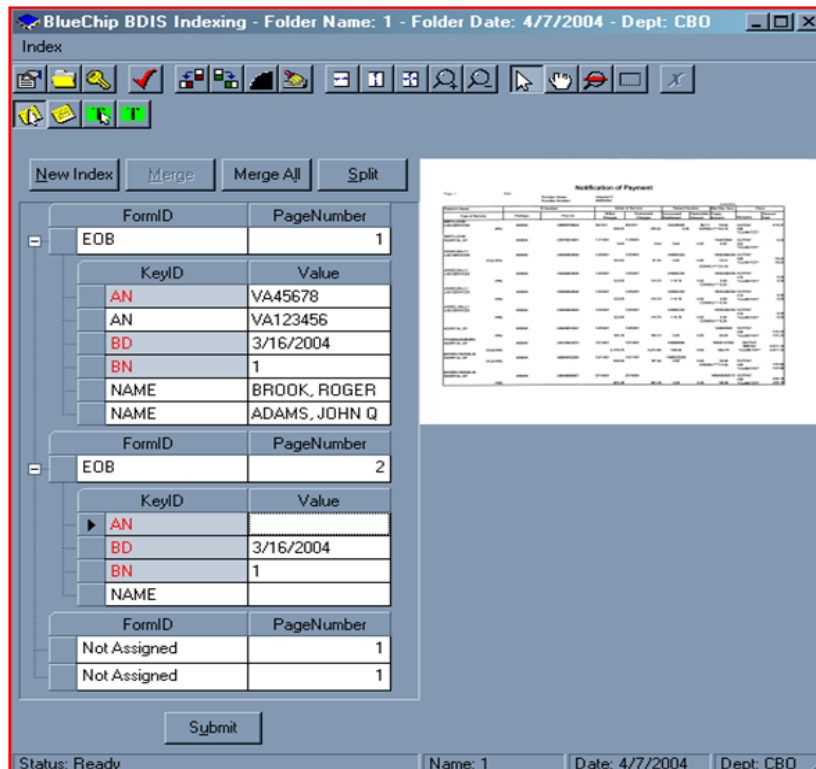
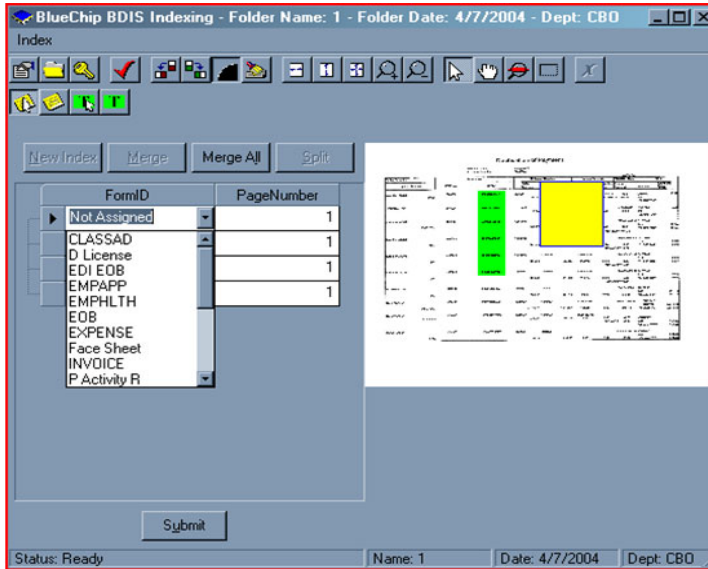
A required key is shown in red with a highlighted background and data for that index must be supplied before submitting the folder as complete. If a folder is submitted that is missing data for one or more required keys, the application will give a warning message to the user with 3 options; ignore the warning and submit the folder anyway, close the folder so that it can be reopened and corrected later, or stop submitting the folder so that it can be immediately corrected by the user.

A multi-key index is one that may have multiple values associated with it for a single image, e.g. an Explanation of Benefits document may have multiple account numbers associated with each page.

Manual indexing

To perform a manual indexing:

- I Open the folder and select the form ID for the current image.
Once the form ID has been defined, the application will determine what index values should be applied to the document and display them to the user.



- 2 Enter in the index data for the current image.
If a key is a multi-key, the **NEW INDEX** button will be enabled when the key's edit field has the focus. To add another value for the index, simply select the **NEW INDEX** button and a new key index field is added to the index list.


- 3 Once all indices have been given for the first image and the next image is selected, the operator can either assign a new form ID and enter new index data or merge it with the previous image. Merging causes the current image to be the next logical document page of the previous image.

To merge:

Select **MERGE** and the form ID and index key values of the previous image will be copied over to the current image and the current images page number will be reassigned.

Note Multi-key values will not be copied from image to image.

Instead of merging on image at a time, the operator may select **MERGE ALL** to perform the merge action on the rest of the images in the folder. When merging all, each image preceding the first will become the next logical page of the same document containing the same index key values as the first image

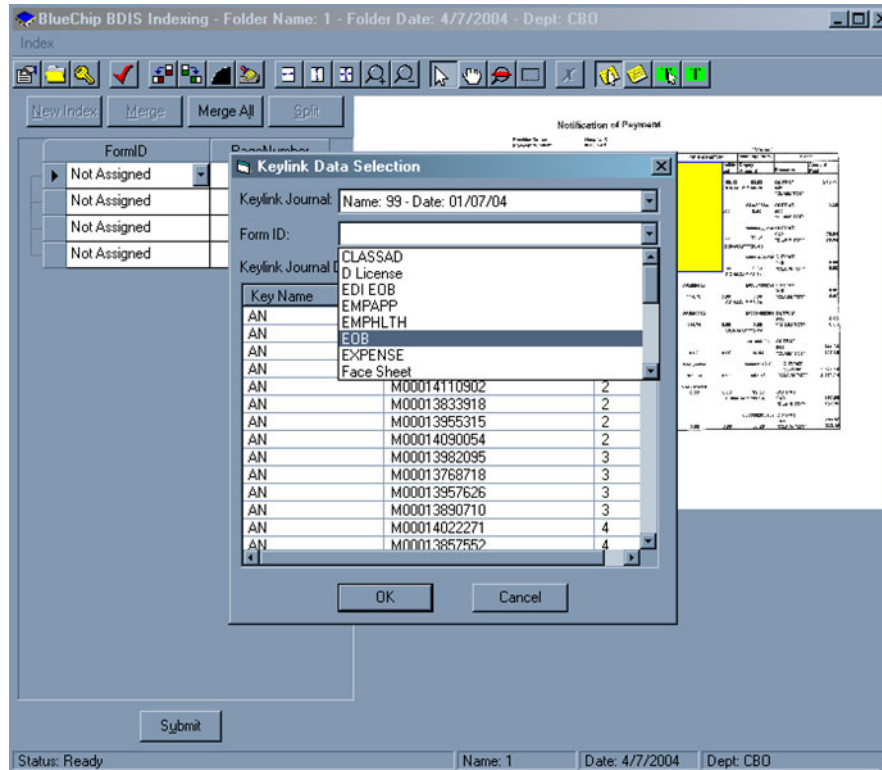
- 4 Once all images have been assigned index values, the operator can either close the folder or submit it as complete by selecting the **SUBMIT** button or clicking on the submit icon on the toolbar .

KeyLink Indexing

To perform KeyLink indexing:


- 1 Open the folder and select the Gold KeyLink icon from the toolbar or the InsertKetLinkData option from the Index menu.

A KeyLink Data Selection dialog opens.



- 2 Select the KeyLink Journal to be linked to.
- 3 Select the form ID to be used.
- 4 Verify the data in the journal, to be sure it is correct, and select **OK**.

The application will then assign the selected form ID to all images, merge all of the folder images into one document and associate all of the index values from the journal to the appropriate document page number(s).

- 5 the operator can either close the folder or submit it as complete by selecting the **SUBMIT** button or clicking on the submit icon on the toolbar .

Section 5: Working with images

There are several options available within both Scan and Index for editing and navigating images. These options are identical in both applications. In addition, Scanning and Archiving and index operators can add and edit annotations such as area highlighting and "sticky notes" to communicate information about images and documents with one another.

The following table lists the various image editing options available along with the icons for each edit option.

Table 5-A: List of various image editing options along with their icons as you see them in the toolbar











Icon	Edit option/functionality
	Rotate icon - Use this option to rotate the image left or right by 90°.
	Smooth edges icon - Use this option to sharpen the image.
	Clean Image icon - Use this option to despeckle or clean an image.
	Delete icon - Use this option to delete an image from the BDIS folder, select the image you would like to delete from the image list in the lower left of the application window
	<p>Annotations icons</p> <p>Each image is comprised of three separate layers; Image, Notes and Highlights. Notes and highlights are designed to aid Scan and Index operators communicate with one another during the capture and organization components of BDIS and are not intended to be included as part of the historical document. When documents are submitted to archive for long-term storage, only the image and related indexing data is retained while the notes and highlight layers are deleted.</p> <p>Before an annotation can be modified or deleted, the user must first specify the appropriate layer.</p> <p>Select an item icon - Use this icon to select objects. When you click and select this icon, the mouse cursor changes to an arrow.</p> <p>Sticky note icon - Use this icon to modify sticky notes.</p> <p>Highlight icon - Use this icon to modify highlight annotations.</p> <p>To add a highlight, click on the "Add a highlight" icon. Place the mouse pointer to the upper left of the area that you would like highlighted and click the left mouse button. While holding down the left mouse button, drag the mouse pointer to the lower right corner of the highlight area and release the mouse button.</p> <p>Add a note icon - Use this icon to add a note. When you click on this icon, a yellow note shows in the upper left corner of the image.</p>

Table 5-A: List of various image editing options along with their icons as you see them in the toolbar

Icon	Edit option/functionality
 	<p>Zoom icon - Use this icon to zoom incrementally in and out of the image by clicking on the appropriate button on the toolbar.</p> <p>To zoom to width, height, or fit to page, click on the appropriate icon on the toolbar.</p>
	<p>Rubber band zoom icon - Use this icon to rubber band zoom into a specific area of the image, do the following:</p> <ol style="list-style-type: none"> 1 Click on the "Rubber band zoom" icon. 2 Left mouse-click on the image in the top left corner of the area you would like to zoom 3 While holding the left mouse button down, drag the mouse to the bottom right corner of the area you would like to zoom. 4 Release the left mouse button.
	<p>Pan icon - Use this icon to pan the image, or drag the image across the viewable area. When you click on the Pan image icon on the toolbar, the icon will change into a hand. Click anywhere on the image. While holding down the mouse button, drag the mouse icon in any direction and release the mouse button.</p>
	<p>Magnify icon - Use this icon to magnify an area of the image. When you click on the icon, The mouse icon will change to a magnifying glass. Place your mouse cursor over the area that you would like to magnify and hold down the left mouse button.</p>

Section 6: Troubleshooting

This section includes:

[Operator is unable to find a BDIS folder](#) (6-1)

[Line 1 Incorrect syntax near FK_tBOBatchArchRelations](#) (6-1)

[Runtime Error 2147217900\(80040e148\)](#) (6-2)

[ActivateFirstActiveCell: Automation Error. Object invoked. Disconnected from client](#) (6-2)

[Error number -4127167259 - Data source name not found and no default driver was specified](#) (6-2)

Operator is unable to find a BDIS folder

Problem:

Operator is unable to find a BDIS folder

Cause:

Either the folder has been fully processed or is "locked".

Resolution(s):

To prevent multiple users from editing a folder, BDIS "locks" each folder once opened by an operator. Locked folders are invisible to other users. At times, if an error has occurred while processing a folder, the folder can get caught in a locked state. To correct this, run the BDIS Administrator utility and unlock the folder manually.

Line 1 Incorrect syntax near FK_tBOBatchArchRelations

Problems:

Line 1 Incorrect syntax near FK_tBOBatchArchRelations

Cause:

This is a known problem with the software and is scheduled to be corrected in the next release of BDIS capture.

Resolution(s):

Close the BDIS folder and reopen it.

Runtime Error 2147217900(80040e148)

Problem:

Runtime Error 2147217900(80040e148):

Cause:

This is a known problem with the software and is scheduled to be corrected in the next release of BDIS capture.

Resolution(s):

Close the BDIS folder and reopen it.

ActivateFirstActiveCell: Automation Error. Object invoked. Disconnected from client

Problem:

ActivateFirstActiveCell: Automation Error. Object invoked. Disconnected from client

Cause:

This is a known problem with the software and is scheduled to be corrected in the next release of BDIS capture

Resolution(s):

Close the BDIS folder and reopen it.

Error number -4127167259 - Data source name not found and no default driver was specified

Problem:

Error number -4127167259

Data source name not found and no default driver was specified

Cause:**Resolution(s):**