

How do I use "Bulk Document Import" with Best Practice Software?

This FAQ is intended to answer common questions about using the Bulk Document Import utility within Best Practice. *Now includes scanning to the Inbox as well as importing from a camera.*

Note: 'Bulk Document Import' can be found in the following path: Start > All Programs > Best Practice > Bulk Document Import

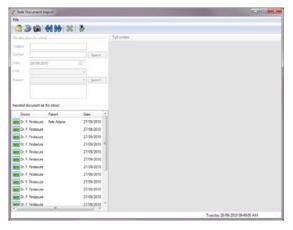
Features of the 'Bulk Document Import' facility: -

- o *Import from file* Import documents scanned via 3rd party applications, photos, images, PDF documents, Microsoft word, RTF or text documents and HTML files.
- o Import from scanner Scanning of documents using a local or network scanner
- o Import from camera Import photos directly from a camera

Benefits of the 'Bulk Document Import' facility: -

- o Users do not need to have access to the patient's clinical records.
- o Documents / images can be stored in the Inbox or directly into the patient's record.
- Multiple documents can be scanned and stored in the system until the practice is ready to allocate them to a patient. This is a practice wide holding area, not user specific therefore all documents scanned to inbox will be visible until processed.

When opening the 'Bulk Document Import' utility, users are presented with the login screen. Select a user name and enter the password to login. The 'Bulk Document Import' Screen will appear:-

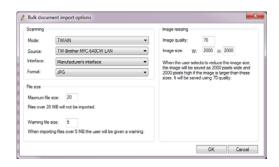


Configuring the system ready for use

Before using the utility for the first time, it is recommended that the relevant defaults settings are configured for the practice. These settings are stored per user.

Select **File** > **Options**. The **'Bulk document import options'** will be displayed. You can configure settings for the following features.

- Mode: select either Twain or WIA
- Source: select the scanner you wish to use
- Interface: select the interface to be used. Select either 'Simple windows interface' or 'Manufacturer's interface'. The later provides more options. (i.e Scan type, quality, size etc.)





- Format: The file format for the scans e.g. PDF, JPG etc. Maximum allowable file size in
- File size: A file size warning and limit can be set in megabytes. When set, the bulk document import utility will prompt you if a scan reaches this size.
- **Image resizing:** The settings here are used in conjunction with the 'File size' setting.

This setting specifies the level of compression for an image. The lower Image Quality

> the number specified, the higher the compression and therefore the lower the quality of the image. Zero would give you the lowest quality

image and 100 the highest.

Image size This is the image size in pixels.

When scanning, if these File size settings are exceeded a message will be displayed. If you choose 'Adjust Size', it will resize the image using the settings under image resizing.

Import from File

It is possible to import documents that are saved or scanned externally to Best Practice. The image types that can be imported include JPG, TIF, TIFF, BMP, PNG, EXIF, RAW, JFIF, GIF, PMP, PDF, RTF, DOC, DOCX, TXT and HTML file.

Click the 'Import document' button or File > Import from File



A file browser screen will be displayed. Browse to the folder containing the scanned documents. The 'Files of type' drop down box may need to be changed if the scanned document does not appear. Highlight the document to be imported and click the 'Open' button.

It is possible to import multiple files are the same time by selecting each document to be imported before clicking the 'Open' button.

The 'Import new files' screen will appear.

On the left is the image preview area where you can view each image imported. There are a series of icons across the top of this screen that will allow you to manipulate the view of the image. There is also a drop down box showing the number of pages imported which allows you to move between pages.

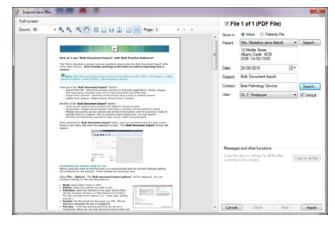
On the top right, there is a count of the number of pages imported. By default this is ticked, if you untick a certain image number then this image will ignored when you select the 'Import' button.

Store in: Imported images can be stored in the 'Inbox' or in the 'Patient file'. By default 'Store in' is set to the Inbox.

Store in Inbox

Patient: To allocate to a patient, click the 'Search' button. The 'Open patient' screen will be displayed. Type the patient's surname, first name. Highlight the required patient and click the 'Open' button. This will now show the patient's name and address. (NOTE: this field can be left blank and allocated later)

Important: Documents do not appear in the Inbox until they are allocated to a patient. This prevents bulk scans from being stored in the inbox without patient allocation.





Date: The 'Date' of the document will default to today's date. This can be changed by using

the drop down calendar.

Subject: The 'Subject' of the document may be entered but is an optional field.

Contact: Click the 'Search' button to find the sender of the document. The 'Select contact'

screen will be displayed. Type the contact's surname and/or category. Highlight the

required contact and click the 'Select' button.

User: This can be used assign the document to the relevant user. Select a User and then

tick the 'Default' tick box if you want the user drop down to default to the selected

Doctor. (NOTE: this field can be left blank and allocated later)

Messages and other functions: - Copy the above settings to all the files currently in this wizard:

Click the 'Copy to all files' button to move the details shown to

each of the documents / images imported.

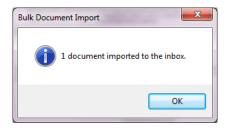
'Add to selected image as a new page': - Tick this box to add this image to the document currently highlighted in the 'Imported document list'.

Merge all images in a single file with multiple pages: - Click the 'Merge images' button to merge all the images into one single file.

Click the 'Next' button to view the next image. Complete any document details as required.

When all images have been reviewed, click the 'Import' button to save the image/s to the Bulk Document Import screen and also in the user's inbox if they have been allocated to a user. A dialog box will appear showing how many documents were imported to patient files and / or the inbox.

Click the 'Cancel' button to clear all the images imported and start again.



File 1 of 1 (PDF File)

Store in: O Inbox Patients File

Best Pathology Service

▼ Cancel < Back Next > Import

Copy to all files

Category: REPORT

Store in Patient file

Patient: To allocate to a patient, click the 'Search' button. The 'Open patient' screen will be

displayed. Type the patient's surname, first name. Highlight the required patient and click the 'Open' button. This will now show the patient's name and address. (NOTE:

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Subject: The 'Subject' of the document

may be entered but is an

optional field.

Contact: Click the 'Search' button to find

the sender of the document. The 'Select contact' screen will be displayed. Type the contact's surname and/or category.

Highlight the required contact and click the 'Select' button.

Category: Select the document category that best describes this document. New document

categories can be added via Setup > Configuration > Lists > Document Type.

Detail: Enter a more detailed description for this document.

User ref: Enter a user reference if one is used within the practice.

Confidential: Tick this box if the document is confidential. The document will only be visible for the doctor marked as 'Usual doctor' in the patient's record.

Messages and other functions: - Copy the above settings to all the files currently in this wizard: Click the 'Copy to all files' button to move the details shown to

each of the documents / images imported.

Click the 'Next' button to view the next image. Complete any document details as required.

When all images have been reviewed, click the 'Import' button to save the image/s to the Bulk Document Import screen and also in the user's inbox if they have been allocated

to a user. A dialog box will appear showing how many documents were imported to patient files and / or the inbox.

This documents/s will appear in the Correspondence In section of the patient's record.

Click the 'Cancel' button to clear all the images imported and start again.

Note: It is not necessary to allocate all imported/scanned documents to a patient or a user at this time. If these fields are left blank the documents/images will remain in the 'Import document list' waiting to be allocated. This is useful if you are going to scan a large amount of information and don't want to allocate each document on the run.

Import from Scanner

Ensure the scanner is installed and is working in the Windows environment.

Click the 'Scan document' button to display the scanning screen.



Bulk Document Import

1 document imported to patient files.

OK

Depending on the settings saved in the File > Options area either the Simple scanning interface or the manufacturers interface screen will appear. If you are using the Manufacturers interface option please refer to the documentation provided with the scanner for further details.

Below are details of the 'Simple Interface' screen.

- Select the scan source from the drop down
- Choose the colour depth from the drop down (B/W, Colour
- Choose the resolution. By default it is 100 dots per inch 0
- Choose the paper size
- If you are scanning through a document feeder and want the pages to be merged to a single document, tick the 'Autofeed sheets as single document' tick

box.

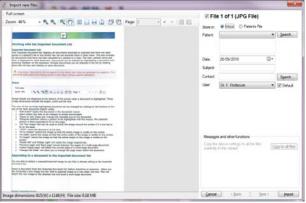
Click scan and the document will be scanned and ready to be allocated to a patient / user.

The 'Import new files' screen will appear.

Scanned images can be stored in the 'Inbox' or in the 'Patient file'. By default 'Store in' is set to the Doctors inbox.

Refer to the relevant section above under 'Importing files' for details of how to use this screen.







Import from Camera

Ensure the camera is connected to the PC and can be accessed within the Windows environment.

Click the 'Import document from camera' button



to display the scanning screen.

All images that are currently stored on the camera will be display a 'Get picture' screen.

By default the 'Thumbnails' icon will be selected and thumbnails of each image will be visible.

To show an image in a larger view, click the 'Detail' icon.

To delete an image from the camera, click the 'Delete' icon.

To import the image, high the image and click 'Get picture'.



The 'Import new files' screen will appear.

Import photos can be stored in the 'Inbox' or in the 'Patient file'. By default 'Store in' is set to the Doctors inbox.

Refer to the relevant section above under 'Importing files' for details of how to use this screen.

Working with the Imported Document List

Imported Document List (for Inbox)

The 'Imported document list' displays all documents imported or scanned that have not been saved directly to a patient's file and where the allocated User has not yet actioned them in their inbox. This also includes all documents that have not been allocated to a patient or a User.

Important: Documents do not appear in the Inbox until they are allocated to a patient. This prevents bulk scans from being stored in the inbox without patient allocation.

The allocated User, patient and date is displayed for each document. As you highlight each document it will display the 'File allocation' details including Subject, Contact, Date, User and Patient that were allocated when reviewing the document.

This screen can be used to allocate the Subject, Contact, Date, User and Patient details if they have not been allocated earlier. You can also allocate the same details to multiple files by holding down the Ctrl key and clicking on each document. Once selected the image will change to 'Multiple files selected' and any changes made in the 'File Allocation' area will be applied to all selected documents.

Documents can be deleted by highlighting a document and pressing 'Deleted' on the keyboard.

Appending to a document in the imported document list

You are able to attach a scanned/imported image to one that is already sitting in the imported document list.

Select a document from the 'imported document list' before importing or scanning. On the 'Import New Files' screen there will be a tick box 'Add to selected image as a new page'.

Tick this to append this current image to the one highlighted in the 'Imported documents list'.

This feature will only work if the highlight document is an image file.

Note: When two files have been merged, the icon on the 'Imported document list' will change from a single page to a nested page to indicate that there are multiple pages.

View



Image details are displayed at the bottom of the screen when a document is highlighted. These image dimensions include the height, width and file size.

The view of the currently highlighted document can be changed by clicking on the buttons at the top of the 'Bulk document import' utility.

- 'Full screen' opens the document in the document viewer.
- Zoom allows the view to be changed to preset percentages
- 'Zoom in' and 'Zoom out' change the viewable size of the document.
- 'Marquee selection' allows a section to be highlighted with the mouse. The selected section is then expanded to fit on the page.
- The 'Pan image' tool can be used to move the image around the screen if it is too big to fit on the page.
- '100%' views the document at full size.
- 'Fit to window' zooms the image so that the entire image is visible on the screen.
- 'Fit width' zooms the image so that the entire width of the image is visible on the screen.
- 'Fit height' zooms the image so that the entire height of the image is visible on the screen.
- 'Rotate left' and 'Rotate right' will rotate the image respectively.
- 'Previous page' and 'Next page' moves between the pages of a multi page document.
- 'Delete image page' will delete the current page of a multi-page document.
- 'Change File Order' will allow you to change the page order within the document

MORE INFORMATION

For more information consult the Best Practice Help Library or contact us via our



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