Automate Document Indexing with Barcodes

Implementing an effective barcode strategy or improving on your current solution will improve the efficiency and accuracy of your content capture and indexing processes.

Presented by **John Marney & Michael Hopkins**

Last Updated Wednesday, March 6, 2019

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Wednesday, April 3, 2019

+ RPI's Project Delivery Methodology (11:00am CT)

+ Accounts Payable Reporting (1:00pm CT)

Meet the Speaker

John Marney

Manager, Solution Delivery

+ Over 8 years of ECM and OCR design and implementation experience

+ Specialized in back-office healthcare and financial services solutions, including Accounts Payable

+ Certified OnBase Installer, KTA Essentials

+ Soon to be Proud Papa Bear

Meet the Speaker

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Michael Hopkins

RPI Marketing & Corporate Communications Manager

+ Extensive experience scoping and designing custom process automation solutions using Perceptive / ImageNow, Kofax, and OnBase products

+ Specialized in clinical healthcare solutions, including medical records and patient financial services

+ Proud Kansas Citian and Midtown Snob

Agenda

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+ About RPI Consultants

+ Large Batch Document Scanning & Indexing

+ Implementing & Improving a Barcode Strategy

+ Additional Considerations

+ Summary & Questions

About RPI Consultants

RPI is a comprehensive professional services organization with over 18 years of experience designing, implementing, and supporting ERP, ECM, and Advanced Data Capture solutions.

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About RPI Consultants

+ 80+ Full-time Consultants, Project Managers, & Technical Architects

+ Offices located in Baltimore, Tampa, and Kansas City, MO

+ Technical Strategy & Architecture, Expert Installations & Upgrades

+ On-demand Product Support & Solution Managed Services

+ Business Process Analysis & Workflow Design, Solution & Product Enhancements

Large Batch Document Scanning & Indexing

Barcode strategies and solutions are particularly valuable in high-volume document capture and indexing areas, especially with organizational or mandated SLAs.

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Scanning & Indexing Requirements

+ Capture large batches of physical or digital content
  - Physical records / documents
  - Imported documents from MFD
  - Digitally formatted forms

+ Separate batches into documents

+ Index documents to keywords

Challenges & Issues

+ Time & Resources

- Batch Preparation & Sorting

- Batch Separation

- Manual Indexing

+ Accuracy & Efficiency

- Illegible Scanned Document Data

- User Error (increases with volume)

- Service Level Agreements (SLAs)

Common Functional Areas

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Medical Records

Patient Registration

Post-Discharge Chart Scanning

Student Records

Student Records Back-Scanning

Financial Aid / Student Employment Forms

Employee Records

Employee File Back-Scanning

Employee Benefits Forms

Supply Management

Packing Slip Processing

Implementing or Improving a Barcode Indexing Strategy

Implementing an effective barcode strategy or improving on your current solution will improve the efficiency and accuracy of your content capture and indexing processes.

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Barcode Automation

+ Requires Optical Character Recognition (OCR)

  - Included with most capture products, such as Kofax VRS, Perceptive Content, and OnBase

  - More advanced OCR logic available through product add-ons / modules

+ Automatically separate large batches

+ Combine orphan or out of place pages
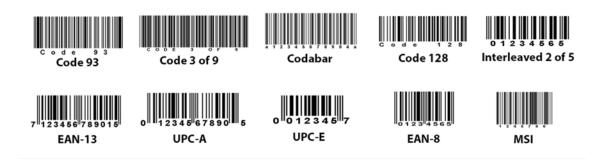
+ Automatically index from barcode data

Barcode Formats

1D Barcodes

+ Data represented in widths and spacing of parallel lines

+ More common, typically free

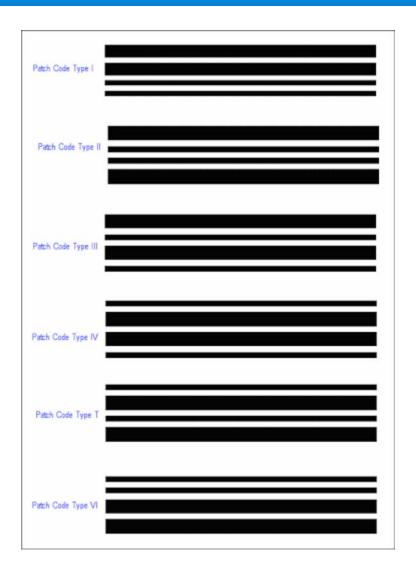+ Limited character / data use

2D Barcodes

+ Data represented in many small, individual dots

+ Less common, may require license

+ Larger character counts and more complex data

Also, Patchcodes

+ Does not contain any data

+ Typically used as separators

+ Very limited use case

+ **Be Awesome, Don't Use Patchcodes**

Patch Code Type I
Patch Code Type II
Patch Code Type III
Patch Code Type IV
Patch Code Type T
Patch Code Type VI
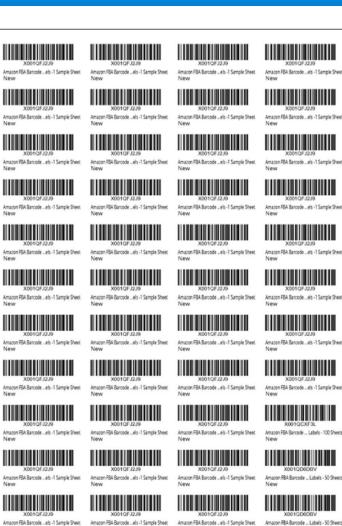
Barcode Creation

+ ## Barcode Fonts

- Barcode 39

+ ## Barcode Generator (Applet)

- Freeware

+ ## Forms Generator

- Ex: Kofax CCM, Yoga Forms

Barcode Types & Document Prep

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+ ## Barcode Coversheets

- Requires document prep to place barcodes

+ ## Barcode Labels Sheets

- Requires document prep to place barcodes

+ ## Barcodes Embedded on Forms

- Does not require any document prep

- Does require form updates / formatting

Barcode Strategery

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	Good	Better	Best
Barcode Format	Patchcodes (actually not even good)	1D Barcodes (ex: 3of9)	2D Barcodes (ex: QR Code)
Barcode Creation	Barcode Fonts (ex: Barcode 3of9)	Barcode Generator (ex: Applet / Widget)	Forms Generator / Designer
Barcode Type	Barcode Coversheets	Pre-printed or Automated Barcode Label Sheets	Embedded Barcodes on Physical / Digital Forms
Document Preparation	Manually Place Coversheets & Separators	Barcodes Placed by Users and/or during Doc Prep	No Document Prep Needed*

* Requires a Forms Generator / Designer

Additional Considerations

Designing and implementing a new barcode strategy and solution should be weighed against your organization's requirements, processes, and structure.

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Workflow & Integration

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+ Automated Lookups

  - Index from single key-value

+ Automated Workflow Routing

  - Route based on index values

+ Document Visibility / Accessibility

  - Document reporting and searching

  - Document viewing from other system

Technical Considerations

+ Capture Software / Licenses

  - What's the quality of the images?

  - How many documents / images do you need to process?

  - Are you capturing from scanner or import?

  - Do you need to capture and OCR emails, faxes, etc?

+ Client v. Server OCR & Indexing

  - Server OCR (ex: Perceptive Recognition Agent) may be less efficient and no more accurate than client-side capture

Product Recommendations

+ Kofax Capture

+ Kofax Virtual Rescan (VRS)

- Perceptive Capture(Now)

- Server version available for digital files and email

+ OnBase Advanced Capture

+ Yoga Capture

- Server-side OCR

Summary & Questions

Implementing an effective barcode strategy or improving on your current solution will improve the efficiency and accuracy of your content capture and indexing processes.

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Expected Benefits

+ Significantly Improved Efficiency

+ Improved Indexing Accuracy
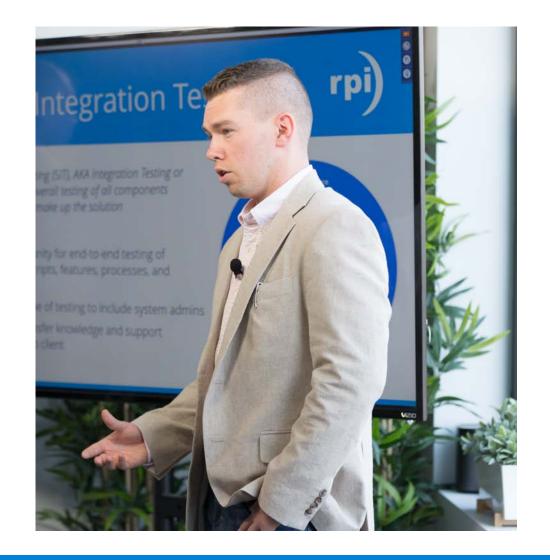
+ Very Happy Employees

Questions

Thank you for attending #WebinarWednesday! The recording of this webinar will be posted online, along with recordings of all our past webinars, at www.rpic.com/webinars.

For more information on this topic, or to suggest topics for the future, contact us at rpi@rpic.com.

More Resources

+ RPI Consultants Knowledge Base

    - https://www.rpic.com/knowledge-base/

+ Yoga Flexible Software

    - https://www.rpic.com/yoga/

+ Webinar Recordings

    - https://www.rpic.com/past-webinars/