Merge - Document Management User Set Up and Preferences

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Merge Document Management: User Set up and Preferences

Merge Document Management Start Up Settings:

Access: To launch the MDM application, users should select the Document Management icon from their desktop.



Document Management Users will either be automatically connected via AD/network login or when prompted, use their network credentials to launch MDM.

- If prompted with the login screen below, enter Login Name, Password and Domain
 - Login Name: firstname.lastname
 - Password: Network password
 - Domain: WDTX

Log On			
Merge Docu	ment Mai	nagement	TW
Login Name:			
Password:			
Domain:			
	Login	Cancel	

- At first login, users will need to complete the set-up process by selecting the appropriate criteria below:
 - Profile: MDM Basic
 - Scan Location: Select the Center/Department location

NOTE: The Scan Location can be changed under User Preferences as needed if user works in multiple

Center

e
Apply

- Merge Document Management User Preferences Settings:
 - The User Preferences section is where you can set all the user-defined preferences for MDM
 - $\circ~$ To launch the User Preferences, click the ion at the bottom right of the MDM window



- User Preferences:
 - The User Preferences window displays. When making any changes to preferences, click the Save button when prompted.
 - It is recommended that II Users review and update the preferences as desired for these three areas:



- Application Settings
 - Run Program on Start Up Select if you would like MDM to auto launch when logging into your workstation
 - Prompt for User Credentials on Start Up Select if sharing a workstation, to have users log in using their Active Directory credentials when scanning
 - Other options Select if desired
- Document Type Order
 - Users can move documents types up or down to customize their view when scanning.

Simply select the document type from the listing and click the 'Move up' or 'Move Down'

button.

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Profile Settings						
An elization Cattions	Patient					-
Application Settings	Categ	Document Type	Order	Visible		Move Up
Local Processing	Radiology	Outside Reports	1	True		Maria Davi
	Radiology	Registration Documents	2	True		Move Dow
Document Type Order	Radiology	Patient Information Sheet	3	True		Toggle Visil
	Radiology	Patient ID	4	True		
Patient Search Preferences	Radiology	Insurance Card	5	True		
Color Desferrer	Sample C	Sample Doc Type (.PDF)	6	True		
Color Preferences	Sample C	Test Order Doc	7	True		
Worklist Preferences	Radiology	New Fax	8	True		
Integration Monitor						
Scanner Preferences						
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Scanner Preferences

Deselect both options to avoid additional pop-up selections when scanning

User Preferences - [Scanner]	Preferences]	
User Preferences	Scanner	
Profile Settings		
Application Settings	Allow to select the scanner	
Local Processing	Allow to specify scanner properties	
Document Type Order		
Patient Search Preferences		
Color Preferences		
Worklist Preferences		
Integration Monitor		
Scanner Preferences	-	

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