

Merge - Document Management User Set Up and Preferences

Last Modified on 04/18/2022 4:24 pm EDT

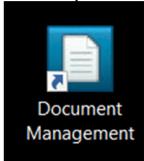


Merge Document Management: User Set up and Preferences

Merge Document Management Start Up Settings:

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

Desktop icon:



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

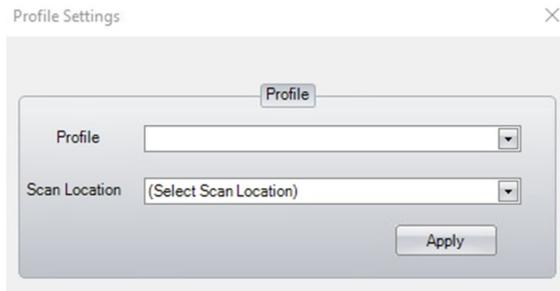
- If prompted with the login screen below, enter Login Name, Password and Domain
 - Login Name: firstname.lastname
 - Password: Network password
 - Domain: WDTX

A screenshot of the "Merge Document Management" login screen. The window title is "Log On". The header features the Merge Document Management logo. Below the header are three input fields labeled "Login Name:", "Password:", and "Domain:". At the bottom are "Login" and "Cancel" buttons.

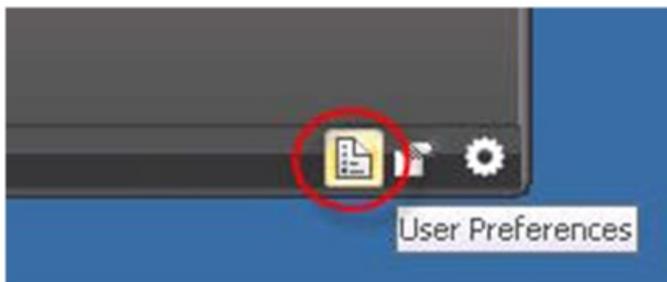
- At first login, users will need to complete the set-up process by selecting the appropriate criteria below:
 - Profile: MDM Basic
 - Scan Location: Select the Center/Department location

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

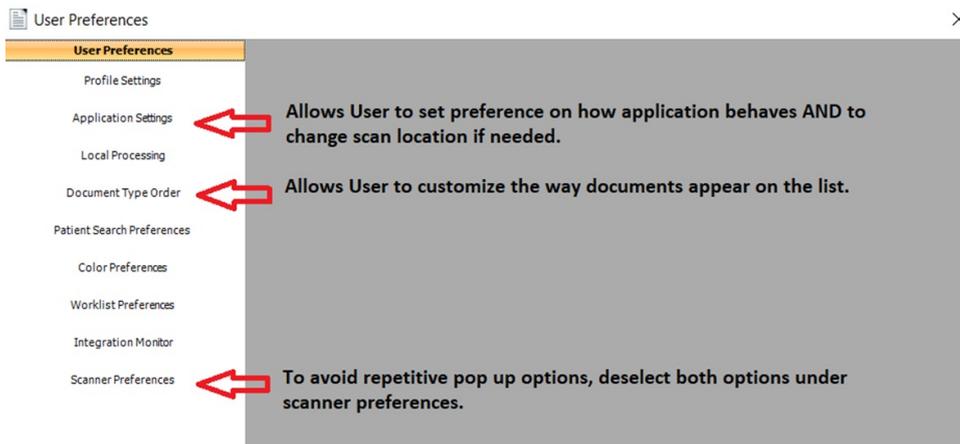
Center



- Merge Document Management User Preferences Settings:
 - The User Preferences section is where you can set all the user-defined preferences for MDM
 - To launch the User Preferences, click the icon 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 all users review and update the preferences as desired for these three areas:



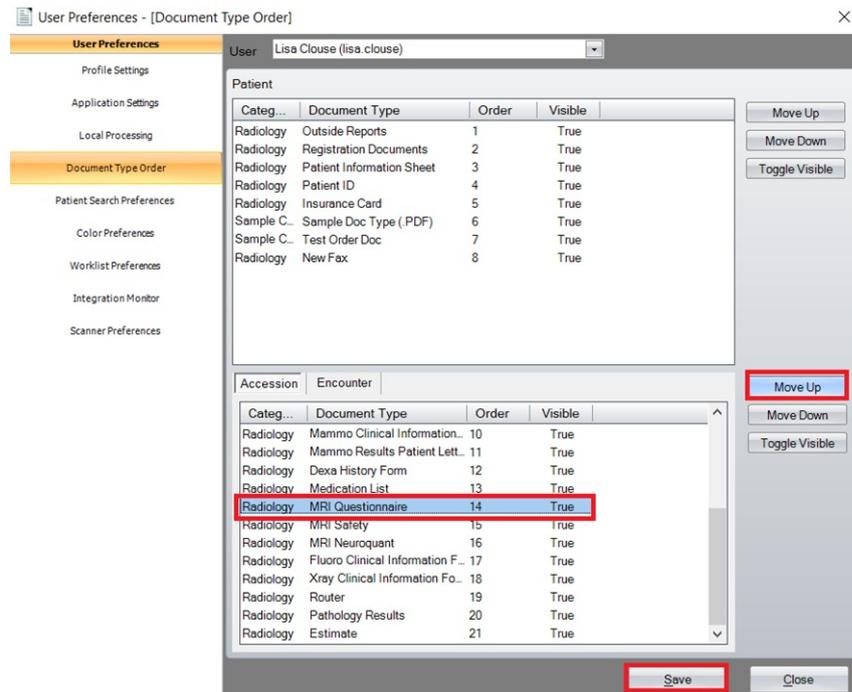
■ Application Settings

- 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

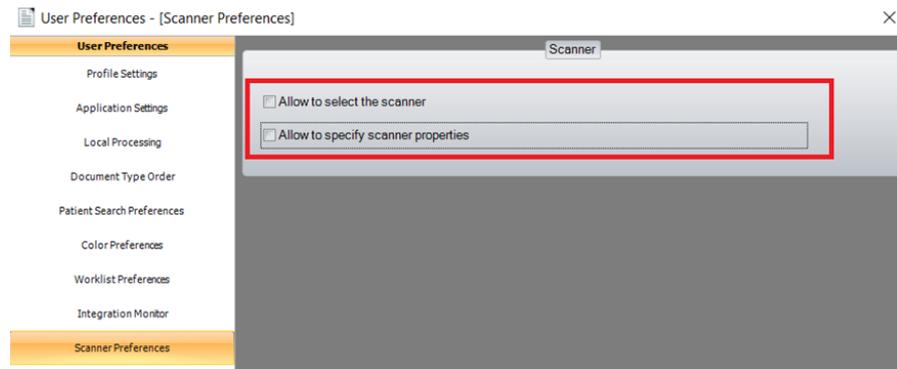
■ Document Type Order

- 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.



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



EDITED: 04/18/2022