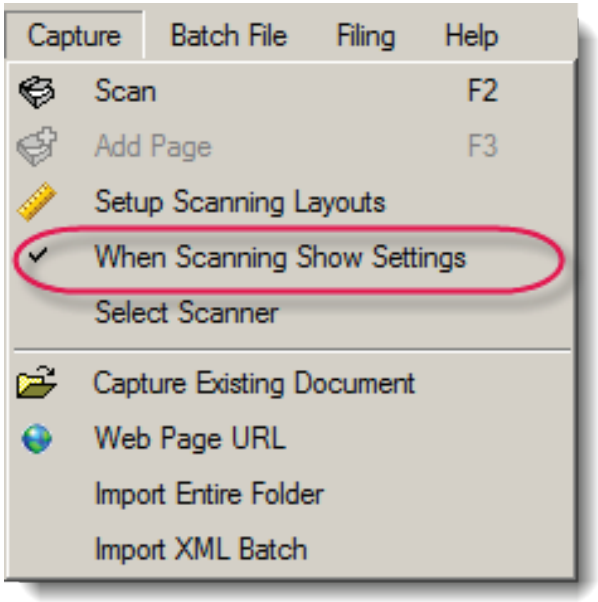
TOP 10 DOCMAN HINTS & TIPS

WHEN SCANNING SHOW SETTINGS

This is useful for changing the brightness/-contrast on faded letters. To enable this click Capture and ensure When Scanning Show Settings is ticked.

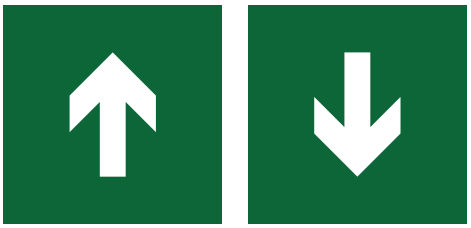


SELECTING MULTIPLE DOCUMENTS

When selecting multiple pages you can hold down the SHIFT key and select as many multiple pages all at once. For example, when you have a 20 page document you click the first document, then hold the SHIFT key and click the last document.

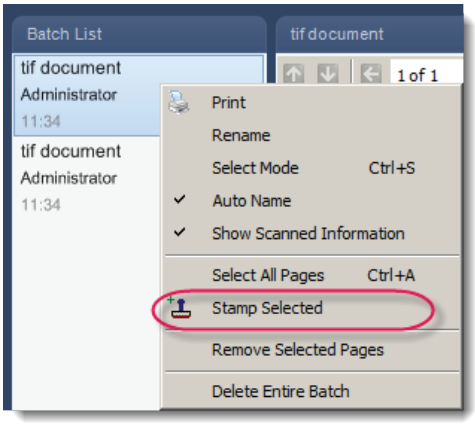
CHANGING THE ORDER OF DOCUMENTS IN A BATCH

This can be used when the scanner has pulled in two documents at once. Select the document you wish to move and use the green arrow just above the pages.



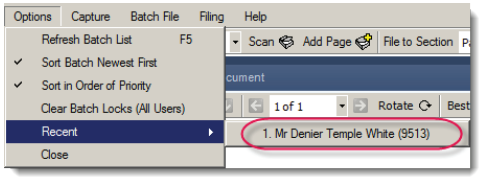
ELECTRONIC STAMPING

This saves having to manually stamp all the post. Click the stamp button and choose which stamp you want to use then right click on your batch and click Stamp Selected.



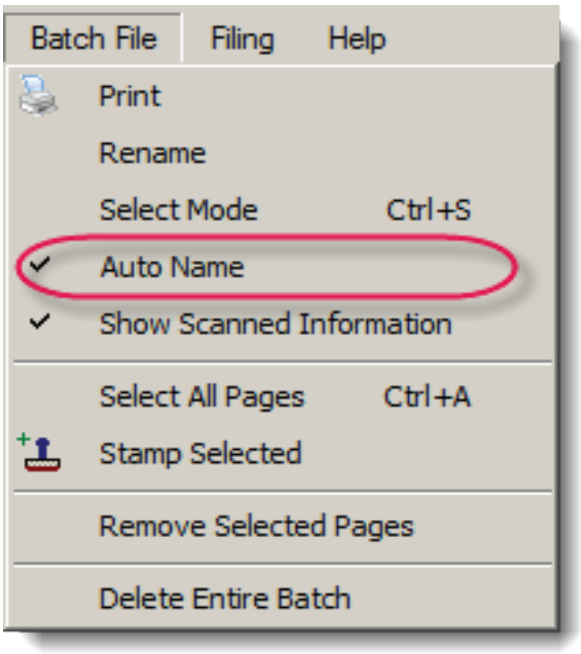
RECENTLY FILED TO

This can be useful to check the last patient you filed to. Click Options then go to Recent this will show the last 10 patients you have filed



AUTO NAME

When 'Auto Name' is ticked this will automatically name the batches at 'Scan' when they are scanned. (When Auto Name is turned off this will ask you to type in a name for the batch). Therefore we can have a batch as 'Singles', 'Multi-pages' or 'Dr Smith' etc. helping the scanner name a particular batch or name its destination (FAO Dr Smith).



AUTO WORKFLOW

At the end of the filing process, when you choose a user, auto workflow will automatically send a document to the user without having to click send. This can be changed in the workflow template under Options. Again, this speeds up the scanning process.

WORKFLOW SORTING

If you want to see oldest/newest workflows first in your list click Manage and go to Workflow Sorting. This allows you to customise your workflow to whatever suits your needs best.

MY RECENT WORKFLOWS

You can see the last 10 patient letters you have dealt with. Click Inbox then click My Recent Workflows. This is useful if you have accidently finished a letter and need it back.

F12 (FILE)

A quick key for File Documents is F12. This helps speed up the scanning process by using the keyword strokes.

COMMON FUNCTION KEYS

Here are some common function keys you may not have known about:

F1 - Displays help tutorials in ANY screen

F2 - Expands/restores the size of a document (in workflow/document viewer)

F3 - Brings up a search engine for the workflow list

F5 - Refreshes the workflow list

F6 - Changes the priority/due date of the workflow

F7 - Adds a free text comment

F8 - Uses the clinical system button

F9 - Uses the summarise button

F10 - Uses the browse documents button

F12 - Uses the finish button

For more shortcuts, from your workflow screen go to Manage the click Hot Keys.

For the Help Centre, please use the link below:

http://www.docman75000.com/