



Quick Sheet: Configuring doc2MD for Multiple Offices

Overview: This document describes how to configure doc2MD workstations that are in separate locations (offices) to connect to the same customer information. While it would seem appropriate to just enter the same client number, user id and password; there is one additional bit of information that the customer is not able to enter which is the Security Key. The Security Key (SK) is a randomized string that further defines the practice's connection attributes. In total, the following values are used to connect:

1. Client Number
2. Client Master User ID (email address)
3. Client Password
4. Security Key (hidden)

These values are stored on the shared document folder in a file called system.dat.

When doc2MD starts, it first attempts to find the system.dat file in the shared folder. If it finds it, it loads the above values and attempts to connect to the doc2MD server. If any of the values are not correct, doc2MD will request the user either correct the location of the shared document folder, or correct the master user id and password. If the user is certain that their information is correct, then they can request

a new security key.

Save and Exit Security Key Cancel

Practice Information

To create a new account or edit your account settings, click here: [Account Information](#)

Offline File Location

All documents created by doc2MD are stored on a local server for quick retrieval. Additionally, the local server is used in the event of an Internet network failure to ensure that the practice always has access to the chart documents. To properly configure this folder, make sure the folder is on a shared network drive that is accessible from all workstations that will use doc2MD.

document folder location \\drh-db1\d2v2

Enter the doc2MD registration information for the practice.

If you do not have registration information yet, click on the Account Information button above to get started.

Note, this is the practice's master connect userid and password.
Individual userid's and passwords are entered when the user interacts with the application.

Account Email: Account Password:

Client Number: [Change Password](#)

Sales tax is used to calculate the amount of tax due on product sales. Please enter your local sales tax value below.

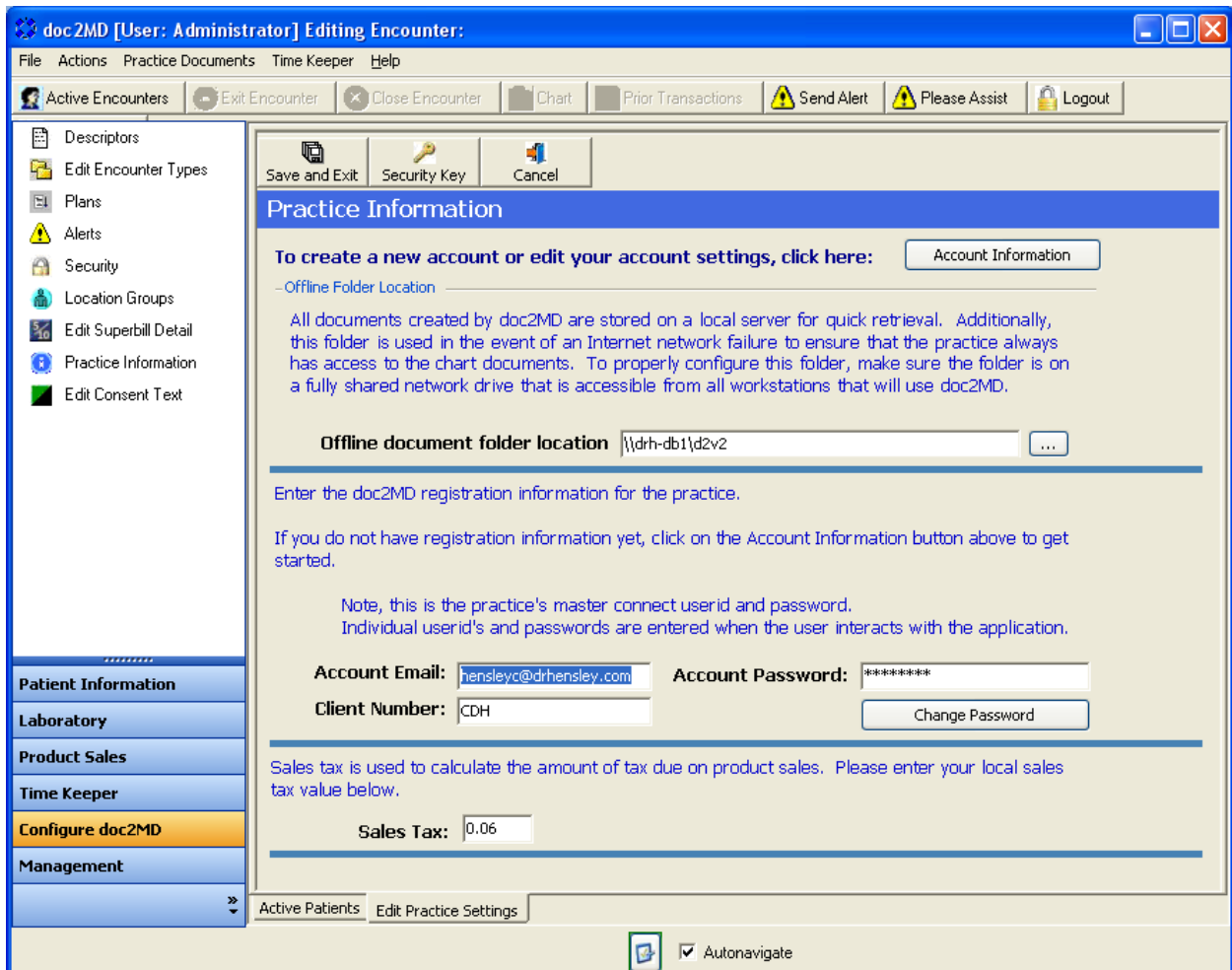
Sales Tax:

The reason the security key is implemented within doc2MD is to weed out individuals who are successful in determining the client's connection (User ID and Password) values. Since the security key is unknown to anyone (except the database) there is no way of connecting without at least changing the key. If the key is changed, it prevents the other computers from accessing the database until it is changed again – thus acting like a warning system that there is someone else accessing their data.

Note: If someone has this issue (in that they need to connect; and only can when they reset the security key), they should change the account password as well since someone apparently has the password and user id.

Setting up another location

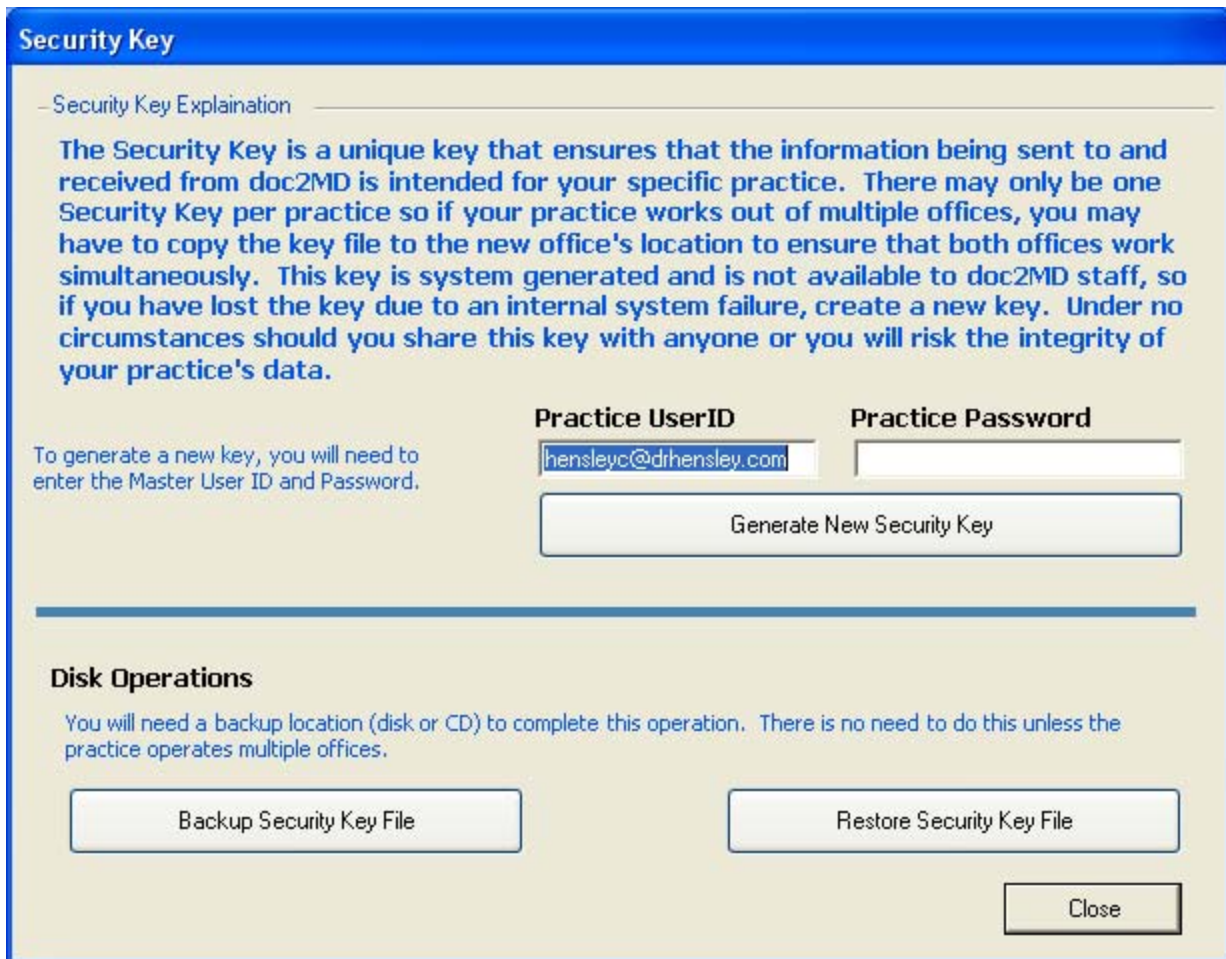
There is a facility within doc2MD for copying the security key for placement at another office. It should be known that this should only be done by a qualified administrator of the client's data.



Steps:

1. Select Configure doc2MD on the left menu bar
2. Select Practice Information from the list

3. Press the Security Key button



Security Key

– Security Key Explanation –

The Security Key is a unique key that ensures that the information being sent to and received from doc2MD is intended for your specific practice. There may only be one Security Key per practice so if your practice works out of multiple offices, you may have to copy the key file to the new office's location to ensure that both offices work simultaneously. This key is system generated and is not available to doc2MD staff, so if you have lost the key due to an internal system failure, create a new key. Under no circumstances should you share this key with anyone or you will risk the integrity of your practice's data.

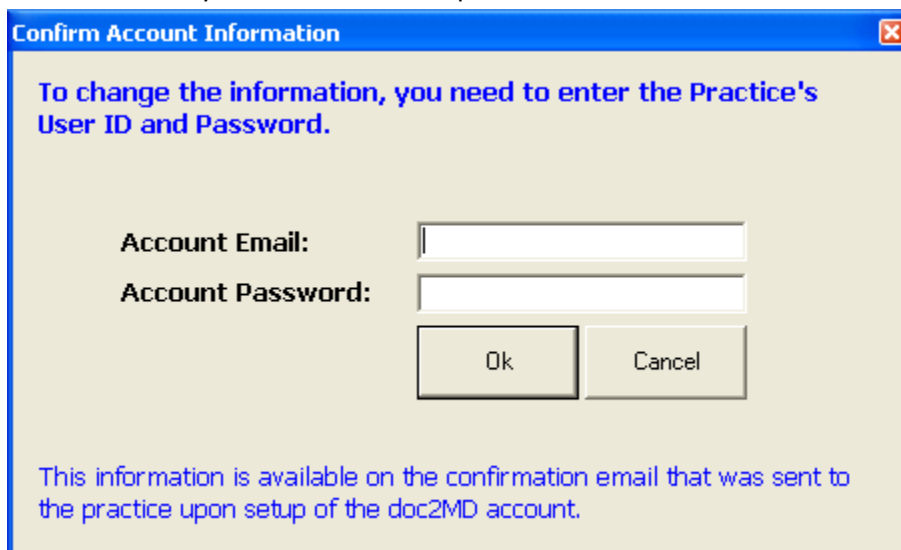
To generate a new key, you will need to enter the Master User ID and Password.

Practice UserID **Practice Password**

Disk Operations

You will need a backup location (disk or CD) to complete this operation. There is no need to do this unless the practice operates multiple offices.

4. Press the Backup Security Key File
5. Enter the security information for the practice



Confirm Account Information

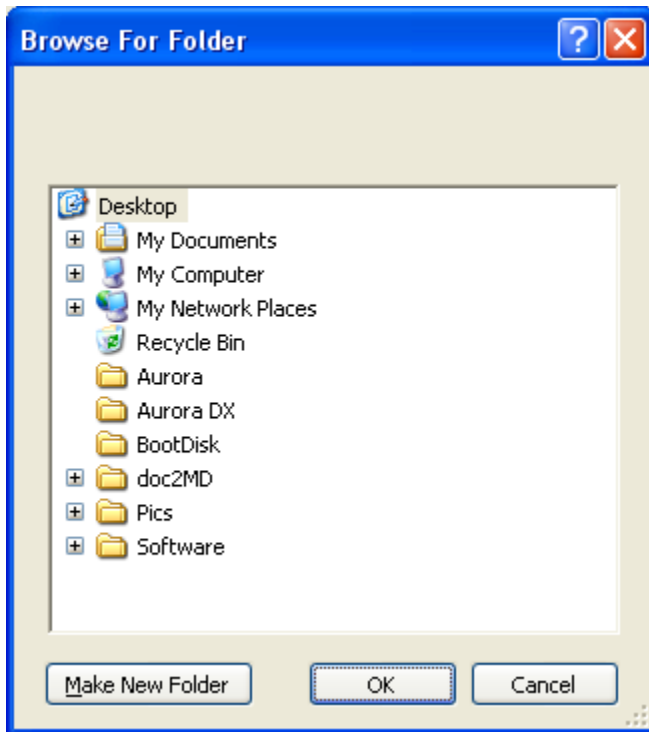
To change the information, you need to enter the Practice's User ID and Password.

Account Email:

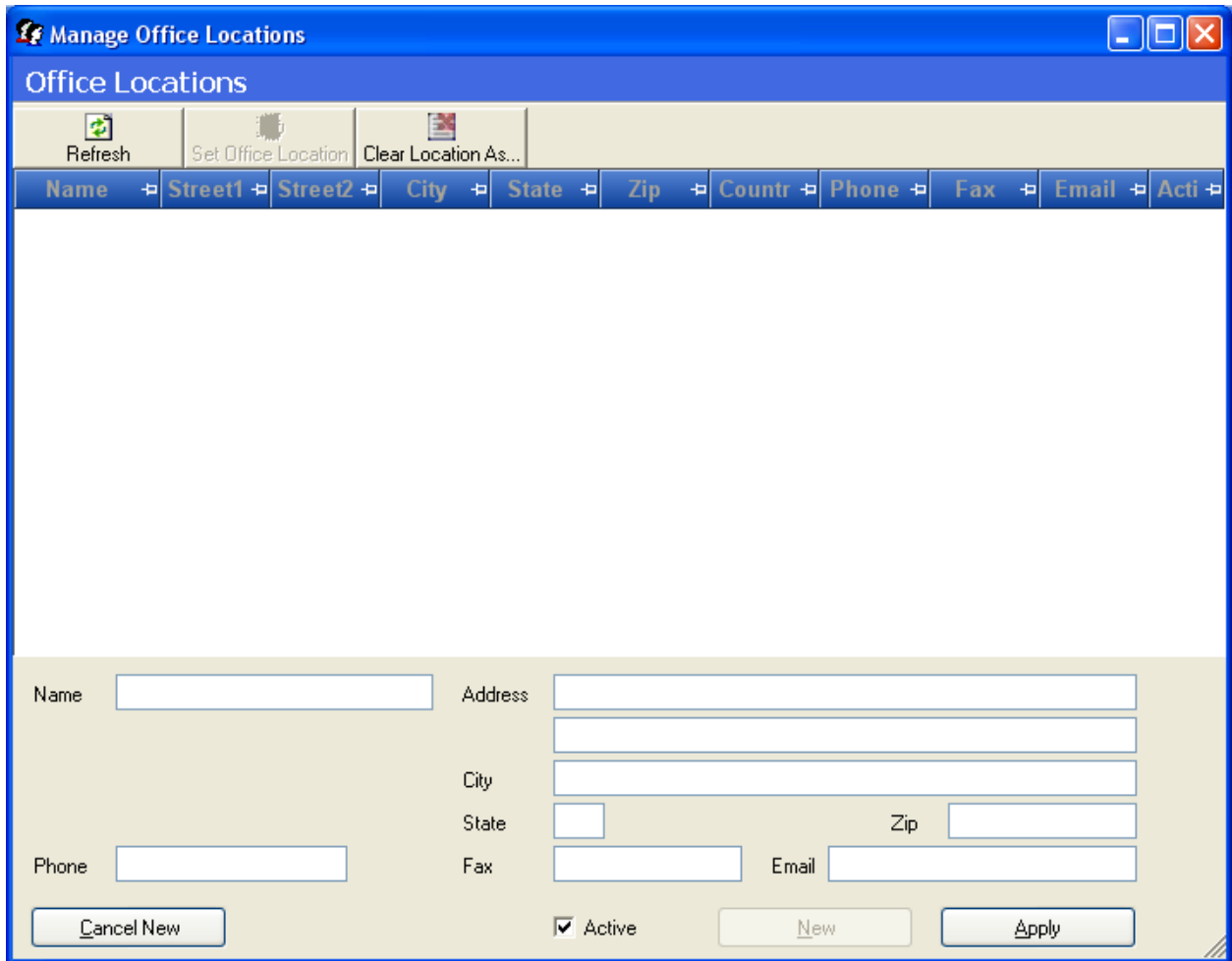
Account Password:

This information is available on the confirmation email that was sent to the practice upon setup of the doc2MD account.

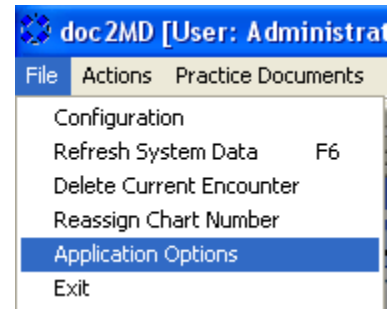
6. Select a target location for the file (a USB drive for example)



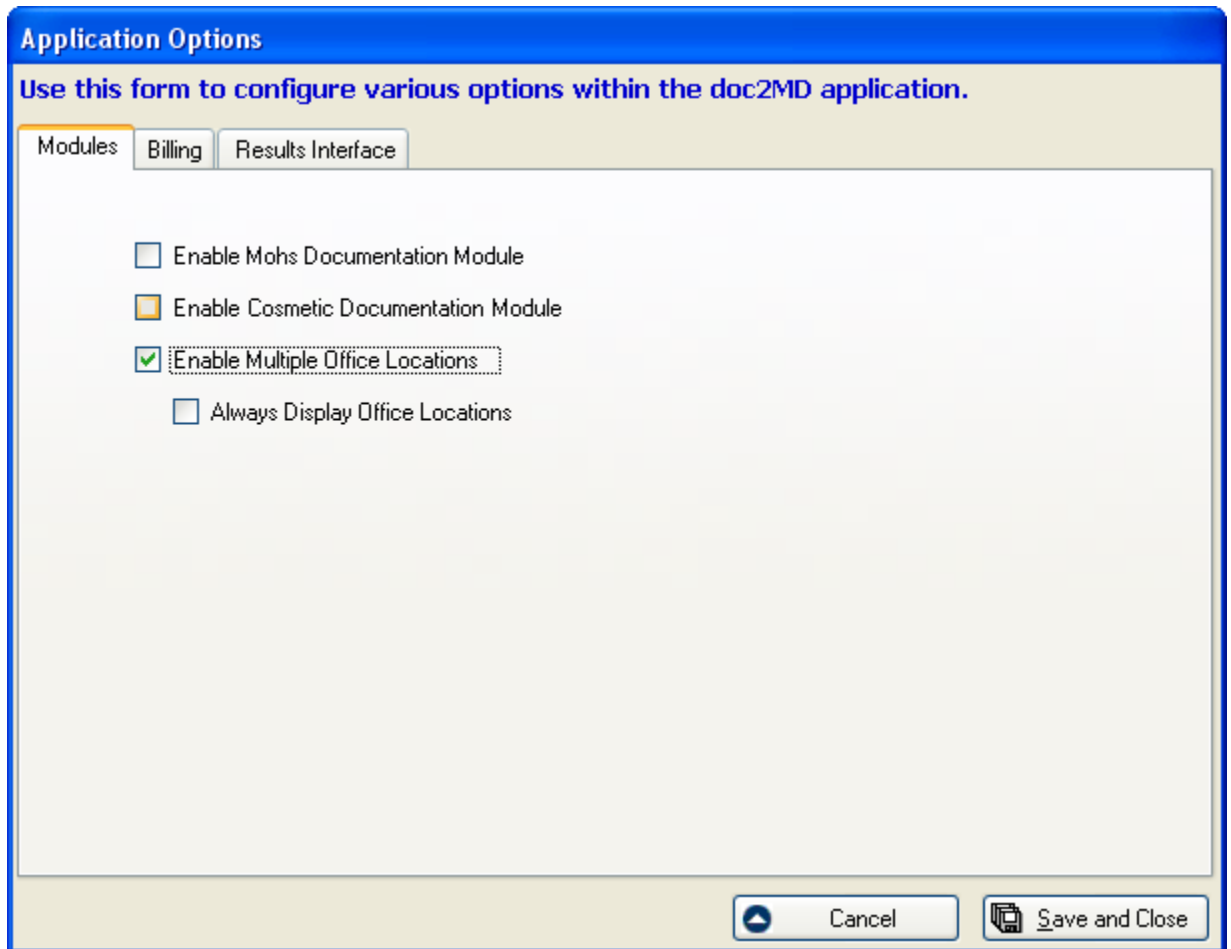
7. Save the file
8. Take the disk to the remote location and save it to the root folder of the *Offline Document Folder*.
9. Start doc2MD at the new location and set the Offline Document Folder to the correct path and doc2MD will find the system.dat file and you now have access to your shared information from two locations.
10. To further clarify the location data, the user must edit the Office Locations option under the Configure doc2MD navigation group on the left. Clicking the Office Locations icon will present the user with the following dialog:



11. Press New to create a new office location. Once created, select the row that represents the workstation's office location and press the Set Office Location.
12. Finally, you must tell doc2MD to utilize the multiple office location features. This is accomplished by going to the File | Application Options dialog.
13. When presented with the Application Options dialog, select Enable Multiple Office Locations to complete the



configuration.



The image shows a software configuration window titled "Application Options". At the top, it says "Use this form to configure various options within the doc2MD application." Below this, there are two tabs: "Modules" (which is selected) and "Billing". Under the "Modules" tab, there are four checkboxes:

- Enable Mohs Documentation Module
- Enable Cosmetic Documentation Module
- Enable Multiple Office Locations
- Always Display Office Locations

At the bottom right of the window, there are two buttons: "Cancel" and "Save and Close".

Note: Remember to set the office location on each workstation. If it is not set, the user will be notified on the Patient Search dialog.