



## INSTRUCTIONS FOR CUSTOMIZING MENUS AND EMAIL NOTIFICATIONS

### I. BASIC ASSUMPTIONS

Because users access the system from myriad devices, it is helpful to be able to customize how the software is displayed. Customizing allows you to manage which menu items appear, and in what order.

More, based on your privilege level, the system is sending you email alerts. You can also define which you wish to receive, and which you would prefer to reject.

Instructions for individual users are as follows:

### II. CUSTOMIZING MENUS

1. Login and select Customize in the bottom right hand corner of your screen.
2. On the left portion of the screen, simply check the menu items that you wish enabled (displayed).
3. More, you can change the order of your menu items. Make adjustments in the Order column.
4. In terms of Search, you have two options:

Classic View: The original search screen. It works great for users that need to frequently change search parameters (e.g., one moment typing Patient Name = "Smith", then quickly changing it to "Jones").

Enhanced View: This is the saved search. So, you can run a quick search, of course, but you can also create, save, and utilize searches that you use frequently (e.g., show me my open surgeries, to the end of the DePuy month, that lack picksheets).

5. Your changes are saved automatically.

NOTE: All you have to do is click the button Reset Menu to Default to reverse any and all changes.

ONE MORE NOTE: You can easily switch between menu settings, i.e., when you are out of the office, or when you come in to do more detailed work. And you can jump between search modes as well. Any time you want to make a change, just click on Customize and adjust according to your needs.

### III. CUSTOMIZING EMAIL ALERTS

1. On the right portion of your screen, simply check the email alert types that you wish enabled (activated).
2. The system saves your changes automatically. You are done!

NOTE: The alert options displayed are dynamic and absolutely dependent on your privilege level. But, you will be able to see all emails that you could possibly receive.

Enjoy and good luck!