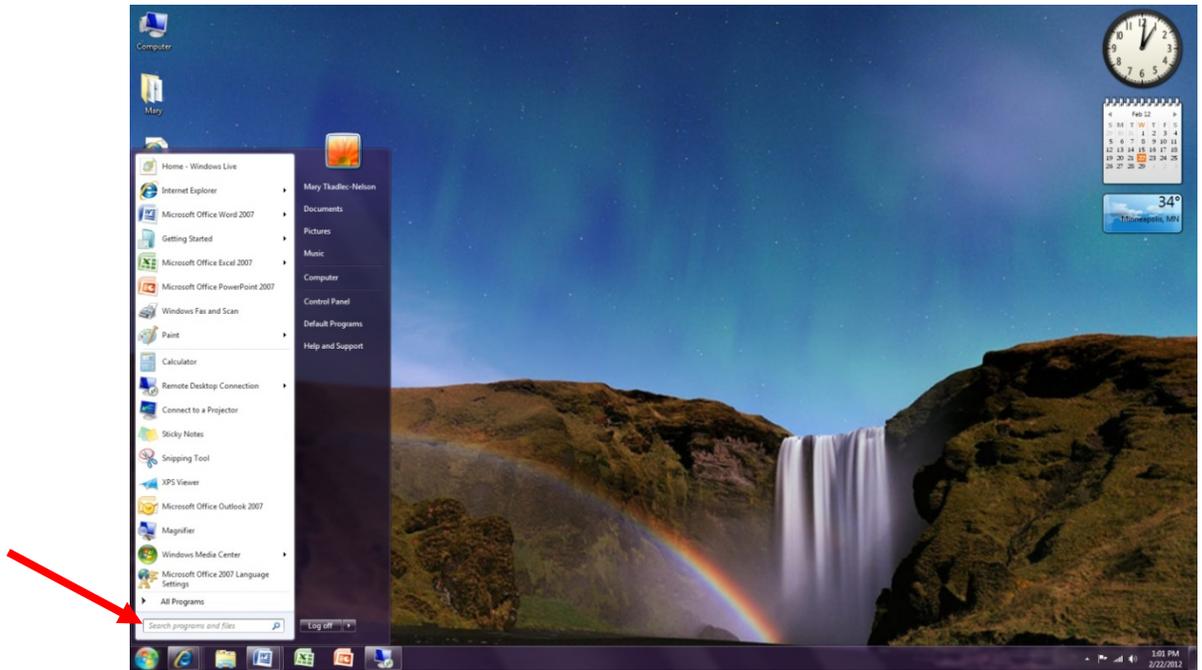


This guide will help you get setup on NextGen for the first time you log onto a City or SBC computer. It will also help if you are a first-time user and need to create your password.

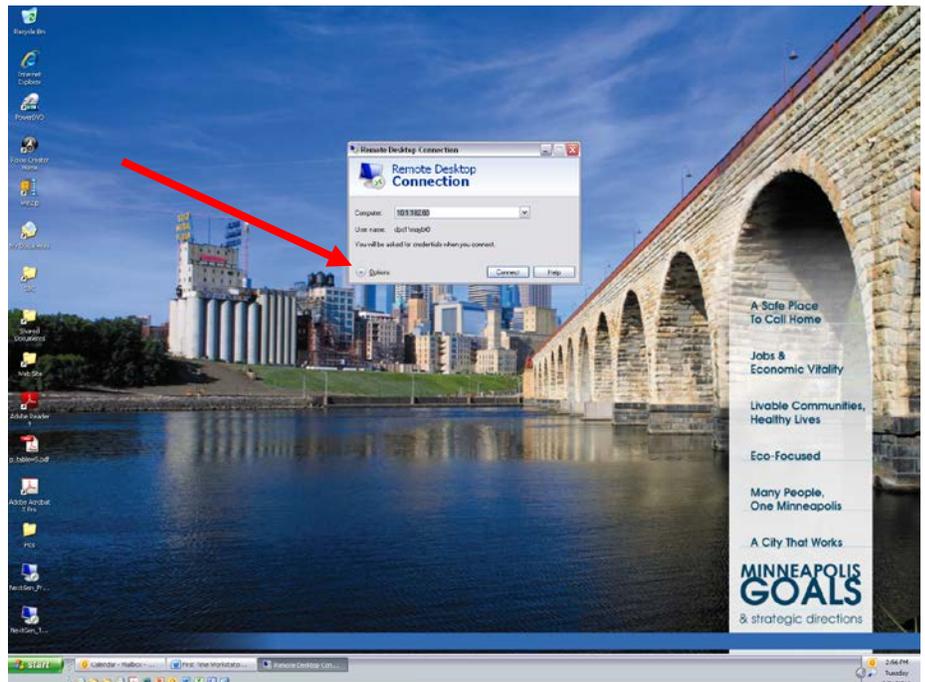
I. Setting up Desktop Icon

- A. On your computer, click on *Start (the round windows icon)*
- B. On the Start Menu, click in the search box and type *mstsc.exe*. This will bring up the Remote Desktop Configuration window.

Note: If you are on a City computer, click on *Run* instead of *Search*.

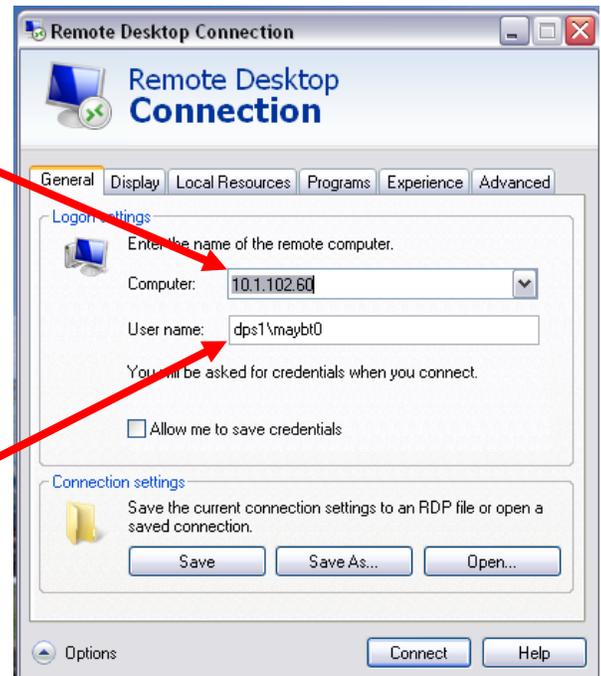


- C. Click on *Options* (do not enter anything in the initial window)



- D. First you are going to setup the icon for NextGen Production.
Under the *General* Tab, find the *Computer:* field and type **10.1.102.60**

Note: You are going to repeat this process to setup a NextGen Test icon. You will instead type **10.1.102.59**

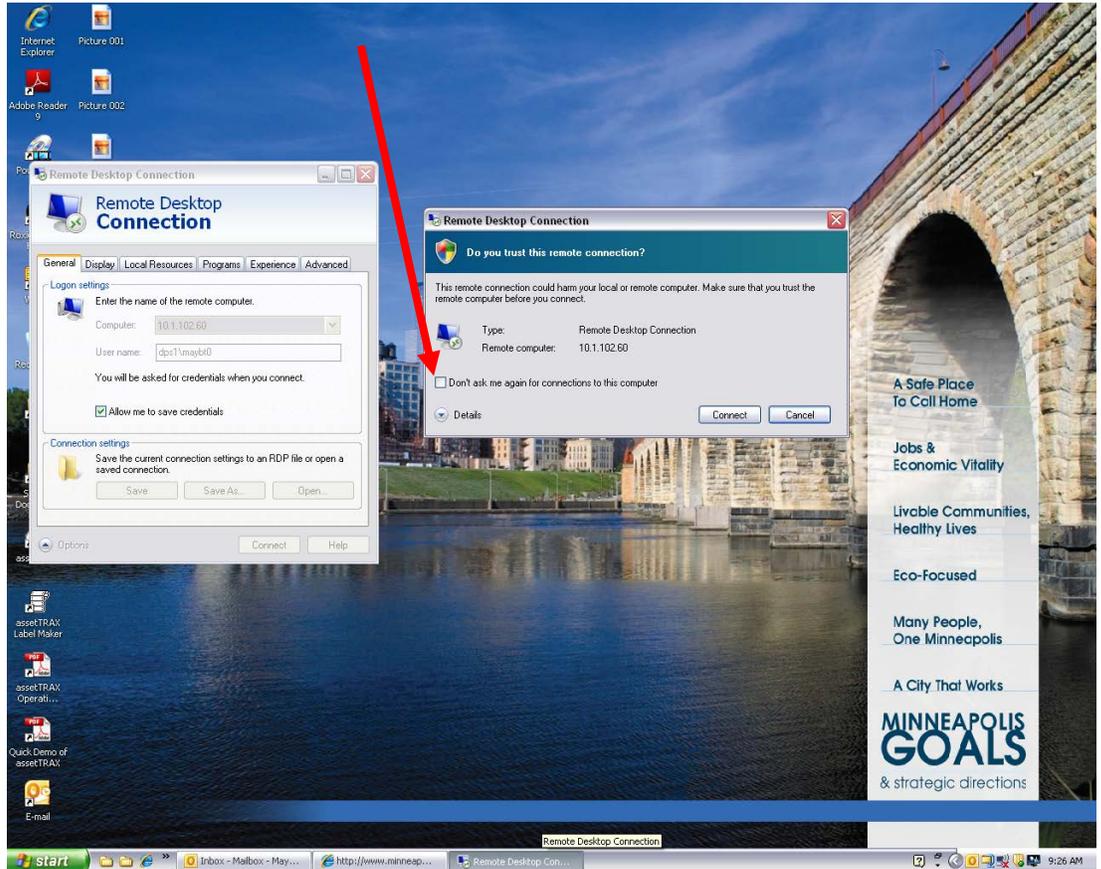


- E. In the *User name:* field, type **dps1** followed by your MPS username
Example: *dps1\atjac099*
- F. Click the *Save As* button
You should not click the “allow me to save credentials” box.
- G. Select *Desktop*, then in the *File name:* field type *NextGen_Prod*
If you are setting up the test environment, type NextGen_Test
- H. Choose *Save*. A shortcut now appears on your Desktop. This shortcut is what you will use from now on to access NextGen.

Note: The procedures above will need to be **repeated on each machine you use**. If you work in multiple clinics, it may be helpful to print this guide and take it with you from clinic to clinic.

II. Logging Into the Remote Desktop

- A. Click *Connect* on the *Remote Desktop Connection* window
- B. On the *Do you trust this remote connection* window, first check the *Don't ask me again for connections to this computer* box. Then click *Connect*.



- C. Once the connection has been initiated, it will ask you for your password.
 1. If you are a first-time user, type *Password1*
 2. If you already have a password, type it in
 3. Click *Connect*

Note: NextGen Test and Prod are 2 separate databases. You will need to enter the generic password the first time you access each of the databases.

- D. If you are a first-time user, you will need to setup your password and will be asked to create a new password. Your password must meet the following criteria:
 1. Have at least 6 characters
 2. Have at least 1 capital letter
 3. Have at least 1 number or special character (!,@,#,\$,?)

E. Make sure to remember this password. Writing it down is not advised.

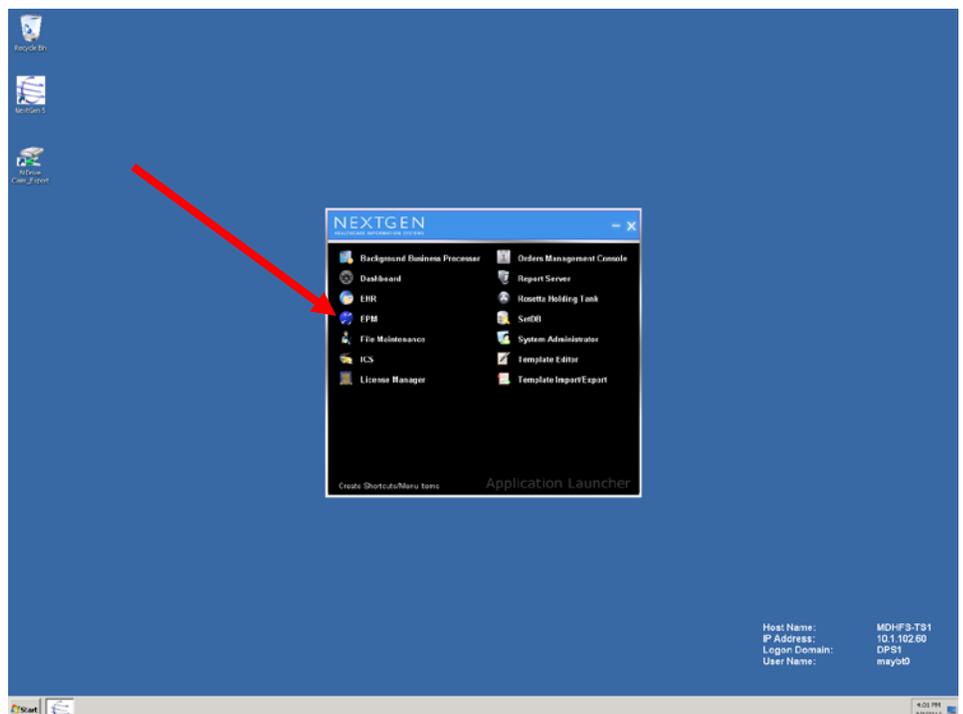
Hint: use the same password as your district login. Then remember to change it every time you change your district password. This way you only have to remember one password.

III. Accessing NextGen

A. Once you have connected to the remote desktop, you will see an icon for NextGen. Double-click on it.

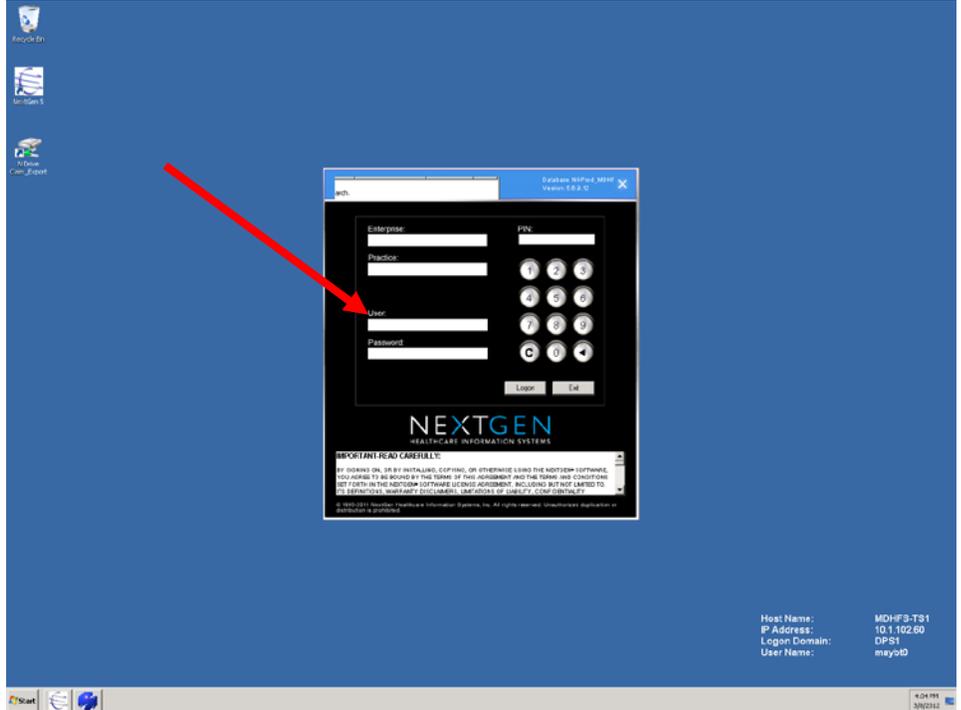


B. You will then see the Application Launcher. Click on EPM.



C. Login

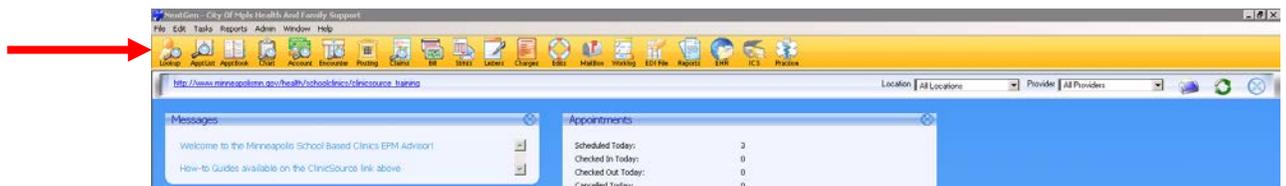
1. Type your NextGen username (the same as your MPS username).
2. Type your password. First-time users should use the generic password *Password1*.



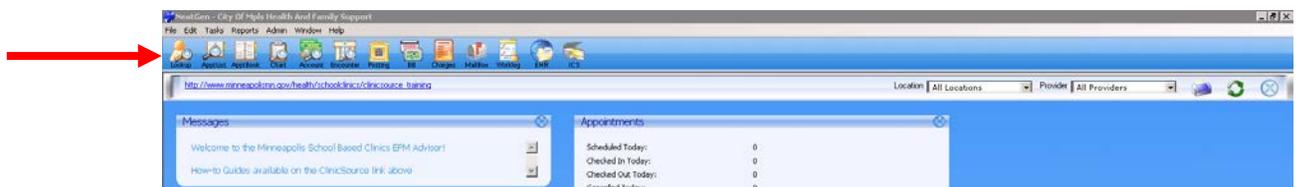
3. First-time users will be prompted to change your NextGen password.
 - a. Old Password: *Password1*
 - b. New Password: This can be the same as the remote desktop password you just set up.
 - c. Create a PIN. It needs to be at least 4 numbers long.

D. You now should have access to the EPM.

1. If you are in Test, the taskbar in the EPM is **gold** and you'll see 10.1.102.59 at the top.



2. If you are in Prod, the taskbar in the EPM is **blue** and you'll see 10.1.102.60 at the top.



Make sure you are in the correct database before you start inputting data or making changes!!

IV. Defining User Preferences

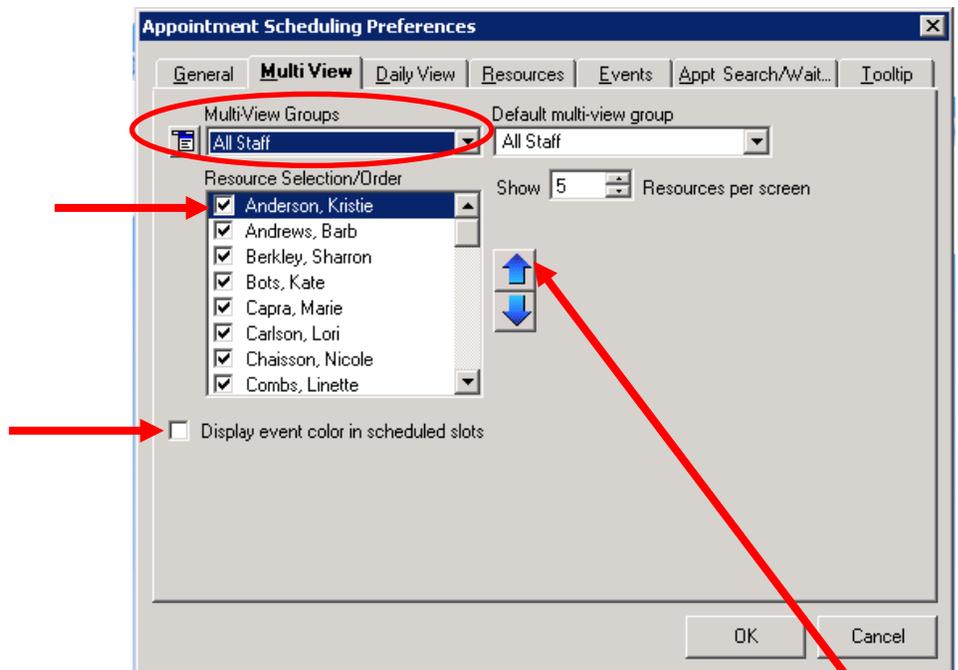
You have the ability to customize the EPM to your needs. Follow these steps to get started.

A. Scheduling Preferences

1. Click on *Admin* and select *Preferences > User > Scheduling*



2. Click on the *MultiView* tab. In the *All Staff Multi-View Group*, select your name.

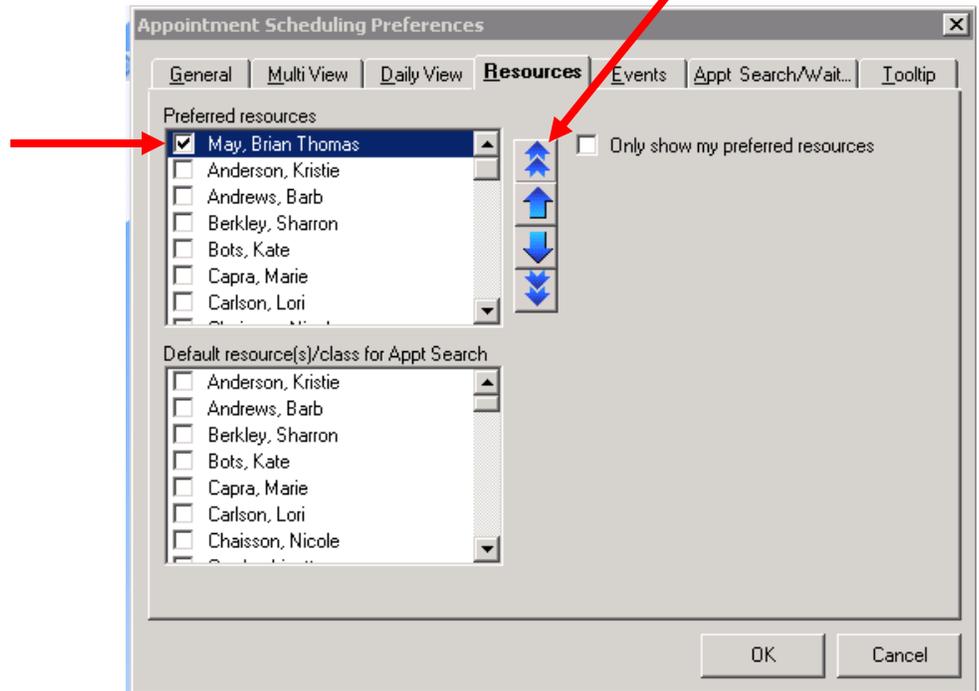


3. Use the blue up arrow to promote your name to the top of the list.

Hint: You can repeat this process for any of the other Multi-View Groups. You can also promote other people that you schedule frequently.

4. Check the *Display event color in scheduled slots* box.
5. Now click on the *Resources* tab.

6. Select your name and click on the double up blue arrows to promote yourself to the top of the list.



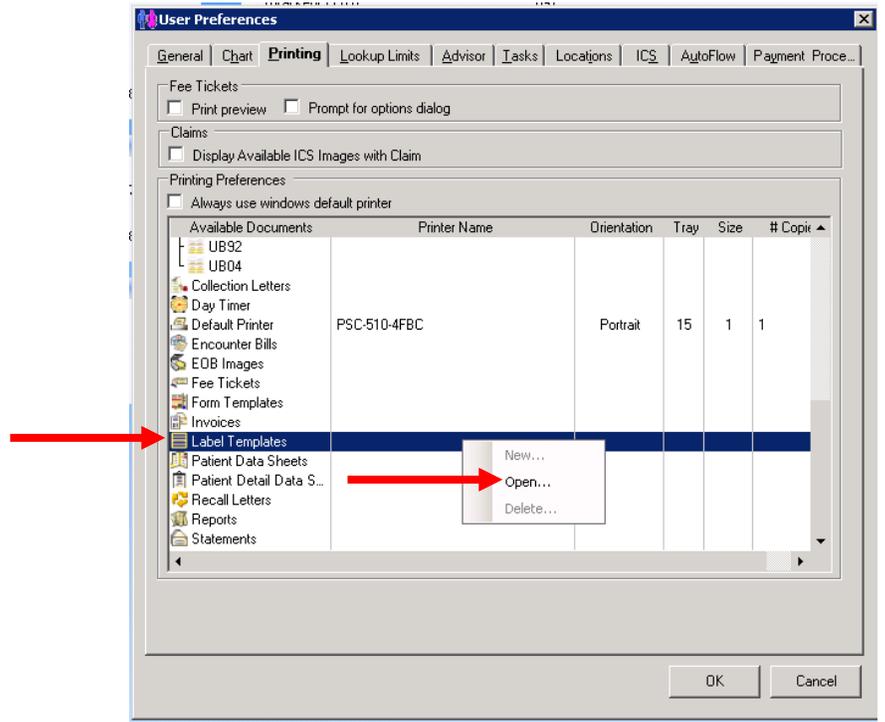
7. Click *OK*.

B. Printing Preferences: Label Printer

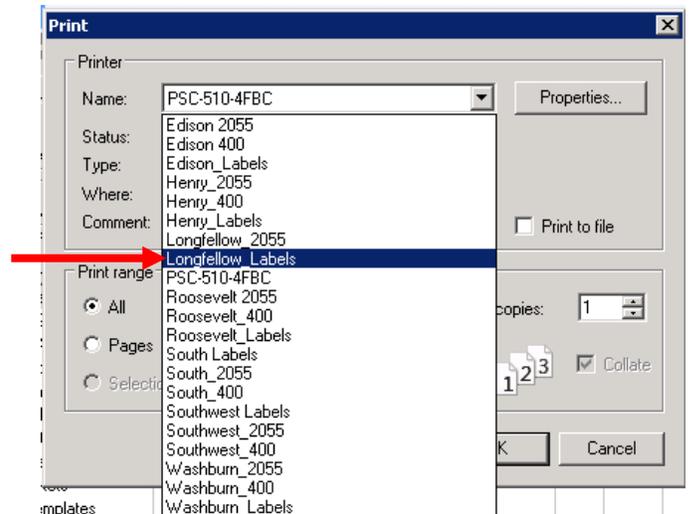
1. Click on *Admin* and select *Preferences > User > General*



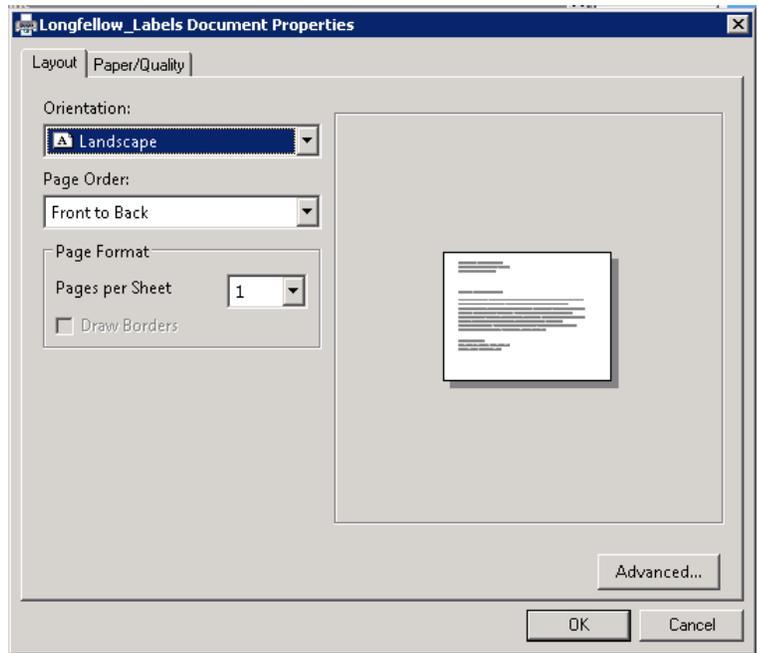
2. Click on the *Printing* tab
3. Scroll down and right-click on *Label Templates* and select *Open*



4. From the drop-down menu, select the label printer for the clinic you are at the most.

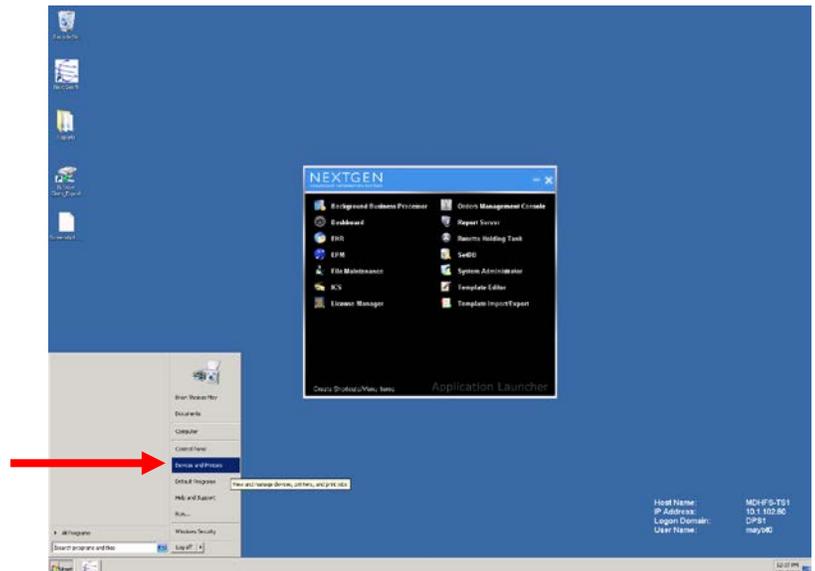


- Click on the *Properties* button and make sure the orientation is set to *Landscape*. Click *OK*.

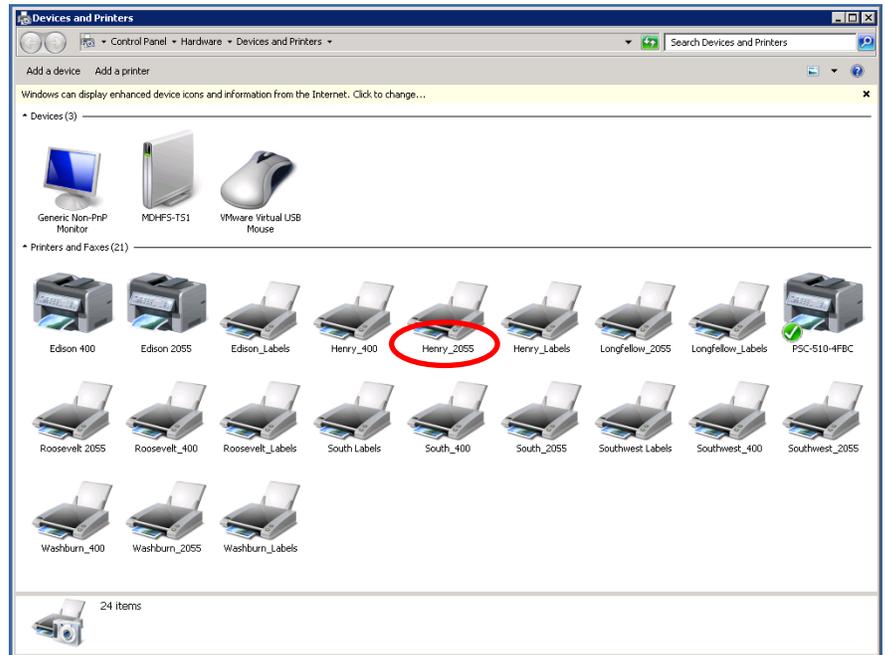


C. Printing Preferences: Default Printer

- Click on the *Start* menu in the Remote Desktop
- Click on *Devices and Printers*



3. Find the 2055 printer for the clinic you spend the most time at and right-click on it.
4. Choose *Set as Default*



Note: You will need to change the default printer each time you visit a different clinic.

Congrats! You are done with this setup guide.