

AmbirScan for Athena User Guide



AmbirScan®



AmbirScan for athenahealth User Guide

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Software Installation Requirements



You must have local administrative rights for initial installation of your software. If you are unsure of your security permissions, please contact your local IT professional.

Software Installation

To install your software, follow these steps:

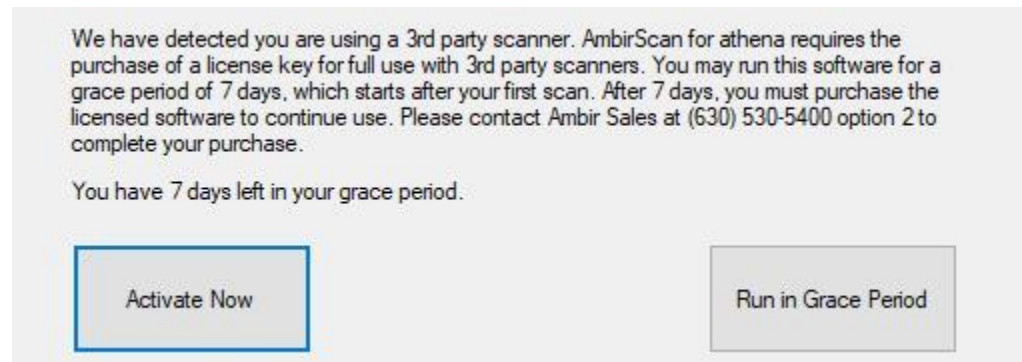
1. **Download** the software via www.ambir.com/athenahealth-setup
2. **Click the folder** after download and **double click** the **AS4Athena.exe** file.
3. Follow the prompts to complete installation.

Licensing

Ambir scanners **do not** require a license key. You will only see this screen if you have a 3rd party scanner.

Grace Period

AmbirScan for Athena has a 7-day, license free trial period for use with 3rd party scanners. You may run the software in the trial period and have full access to the software. After the trial period, a license key is required. You will see the prompt below.



To purchase a license key, contact sales@ambir.com.

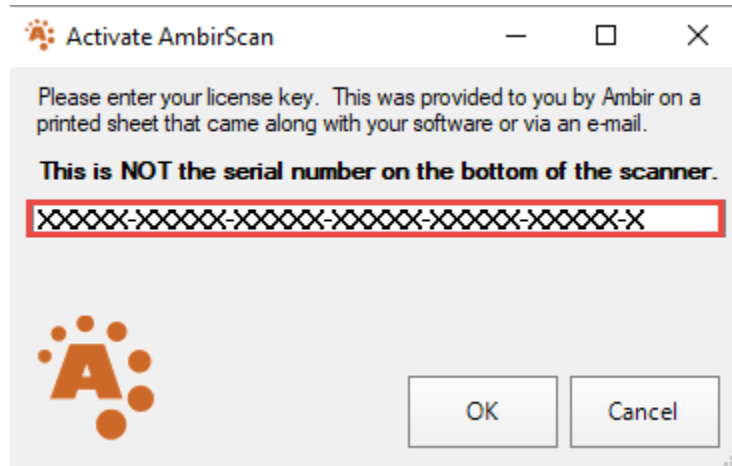



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License Key

After you have purchased your license key, you must enter the key to keep the software activated. Follow the steps below to complete activation:

1. Open **AmbirScan for Athena** software.
2. Navigate to the **About** screen.
3. **Enter your license key** provided by Ambir Technology via email.



 You may receive an error when entering your license key in due to firewall settings. For assistance with error messages during installation, contact [Ambir technical support](#).

Floating License Key

Floating license keys are not registered to a single computer. These are used primarily for environments using virtual machines.

AmbirScan for Athena will check for a scanner at startup. If no scanner is found, the floating license will not be activated or used.



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System Setup

The below default folders are created by the AmbirScan for Athena software installer. The QuickScan settings in the AmbirScan for Athena application by default are setup to save cards and documents into folders on your local computer. The Card folder is where card images are stored, and the Athena Scans folder is for document scanning.

Affirm the following local folders are available:

- C:\Card
- C:\Athena Scans



If you do not see these folders, you must create them manually on your computer's C drive.



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Opening and Running the Application

The default setting for AmbirScan for Athena is to run in **Kiosk** mode. This means the software runs as a background process in your system tray. The AmbirScan for Athena icon will display in the system tray.

Note: Users will not see or interact with the interface unless they manually open the software.



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QuickScans

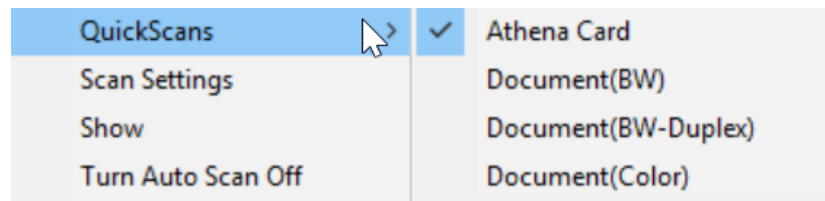
A **QuickScan** is a pre-set scanning profile (specifying file type, resolution, color, etc.) within the AmbirScan for Athena software. Users can edit, create, or delete QuickScans within the software.

The default selected QuickScan for AmbirScan for Athena is the Athena Card QuickScan. Users must change to a Document QuickScan when scanning any media other than cards.

Note: *The last QuickScan that was used will remain selected when AmbirScan for athena relaunches.*

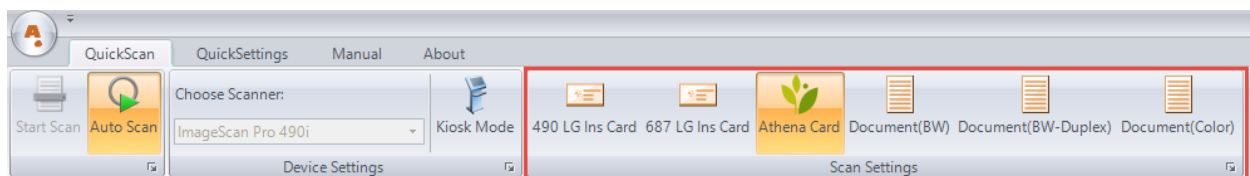
Selecting a QuickScan from Kiosk Mode

1. **Right-click** on the AmbirScan for Athena icon in the system tray.
2. Select **QuickScans**, then choose the appropriate QuickScan for your scan. Once selected, a checkmark will appear to the left of the enabled QuickScan.



Selecting a QuickScan from Interface

1. **Right-click** on the AmbirScan for Athena icon in the system tray.
2. Select **Show**.
3. Select **QuickScans**, then choose the appropriate QuickScan for your scan. Once selected, a checkmark will appear to the left of the enabled QuickScan.
4. Click **Kiosk** to minimize the application again.



! Clicking the “X” at the top of right of the window will exit the application completely. You will need to relaunch the software from your desktop to begin scanning again.



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Selecting a QuickScan from ADF scanners

If you are using AmbirScan for athena on an ADF (high-speed) scanner, you may toggle your QuickScan options via the button on your scanner. Simply choose the corresponding number for the type of scan to be performed and start scanning.

1. Card
2. Document (BW)
3. Document (BW Duplex)
4. Document (Color)
5. Document (Color Duplex)



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Creating New QuickScans

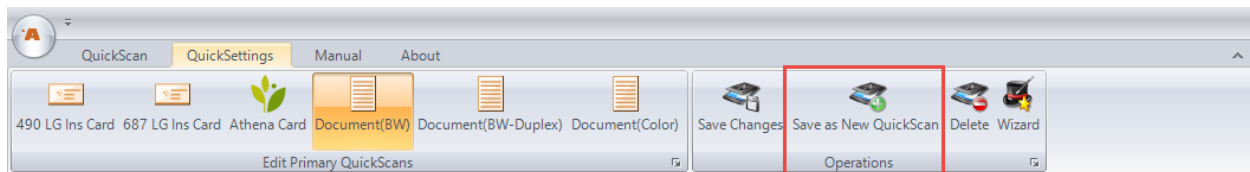
There are two ways you can create a new QuickScan: editing an existing QuickScan and saving as new, or using the Wizard to start from the beginning.

Keeping an Existing QuickScan Setting

Users can create new QuickScans by editing an existing QuickScan and using the **Save as New QuickScan** feature in the **QuickSettings** menu.

To create a new QuickScan with AmbirScan for Athena settings, follow the below steps:

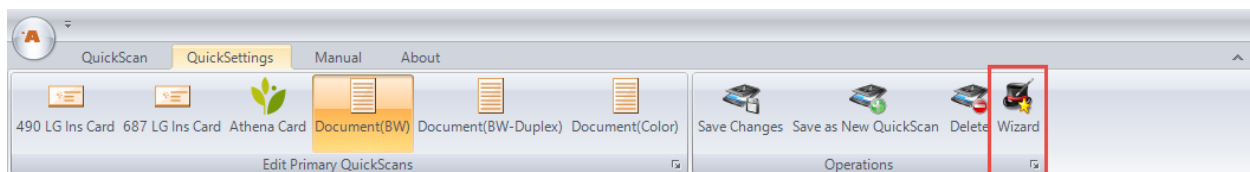
1. **Open** AmbirScan for Athena.
2. **Click** the **QuickSettings** tab.
3. **Select** an existing QuickScan.
4. **Edit** the QuickScan with your changes.
5. **Click Save as New QuickScan** in the **Operations** section.
6. Your new QuickScan will appear in the **QuickScan** menu.



Creating a New QuickScan

To create a new QuickScan, follow the below steps:

1. **Open** AmbirScan for Athena.
2. **Click** the **QuickSettings** tab.
3. Click the **Wizard** function in the **Operations** section.
4. **Name** and select and **Icon** for your QuickScan.
5. **Select** your save path to the appropriate Athena folder on your C drive (*default save location is C:\Temp*).
6. Follow the prompts through the Wizard to select your settings.
7. Click **Finish**.
8. Your new QuickScan will appear in the **QuickScan** menu.

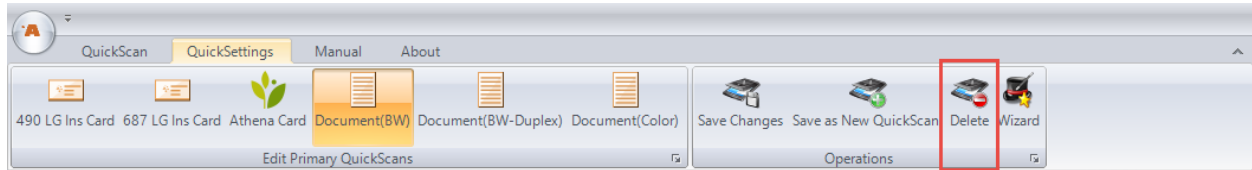




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Deleting a QuickScan

If you need to delete a QuickScan, you can do so by selecting the **Delete** button in the **QuickSettings** menu.



! *Any changes made to QuickScans (Scanning, Output, Imaging,) will not take effect until you click on the Save Changes icon within the Operations box in the title bar area.*



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Scanning Workflows

Driver's Licenses and Insurance Cards

To scan these supported cards, complete the following steps:

1. Confirm the **Athena Card QuickScan** is selected (*Verify by right-clicking the AmbirScan for Athena icon in the system tray and select QuickScans. A checkmark will be present next to the active QuickScan*).
2. **Insert** the ID card in the scanner. The software will automatically pull the card through the scanner.
3. **Select** the correct patient from the search results.
4. Click **Add Card Image** in patient chart under the correct section.

Document Scanning

These are the default QuickScans for scanning documents via AmbirScan for Athena:

- Document(BW)
- Document(BW–Duplex)
- Document(Color)



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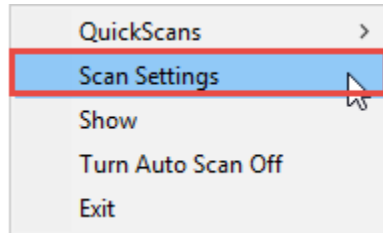
Settings Menu

The Settings menu is where specific administrative settings for the software are stored. The information below provides details as to what the settings are and how they are used.

There are two ways to access the Settings Menu:

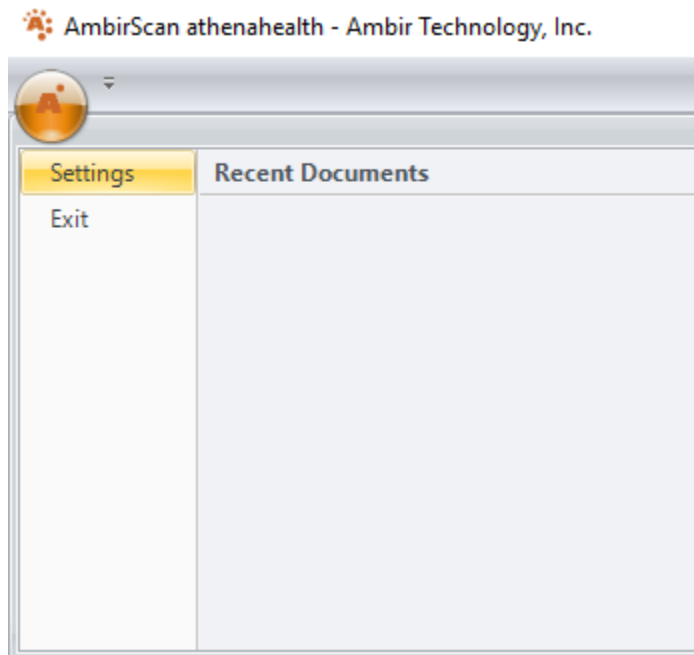
From Kiosk Mode

1. **Right-click** on the AmbirScan for Athena icon in the system tray.
2. Select **Scan Settings**.



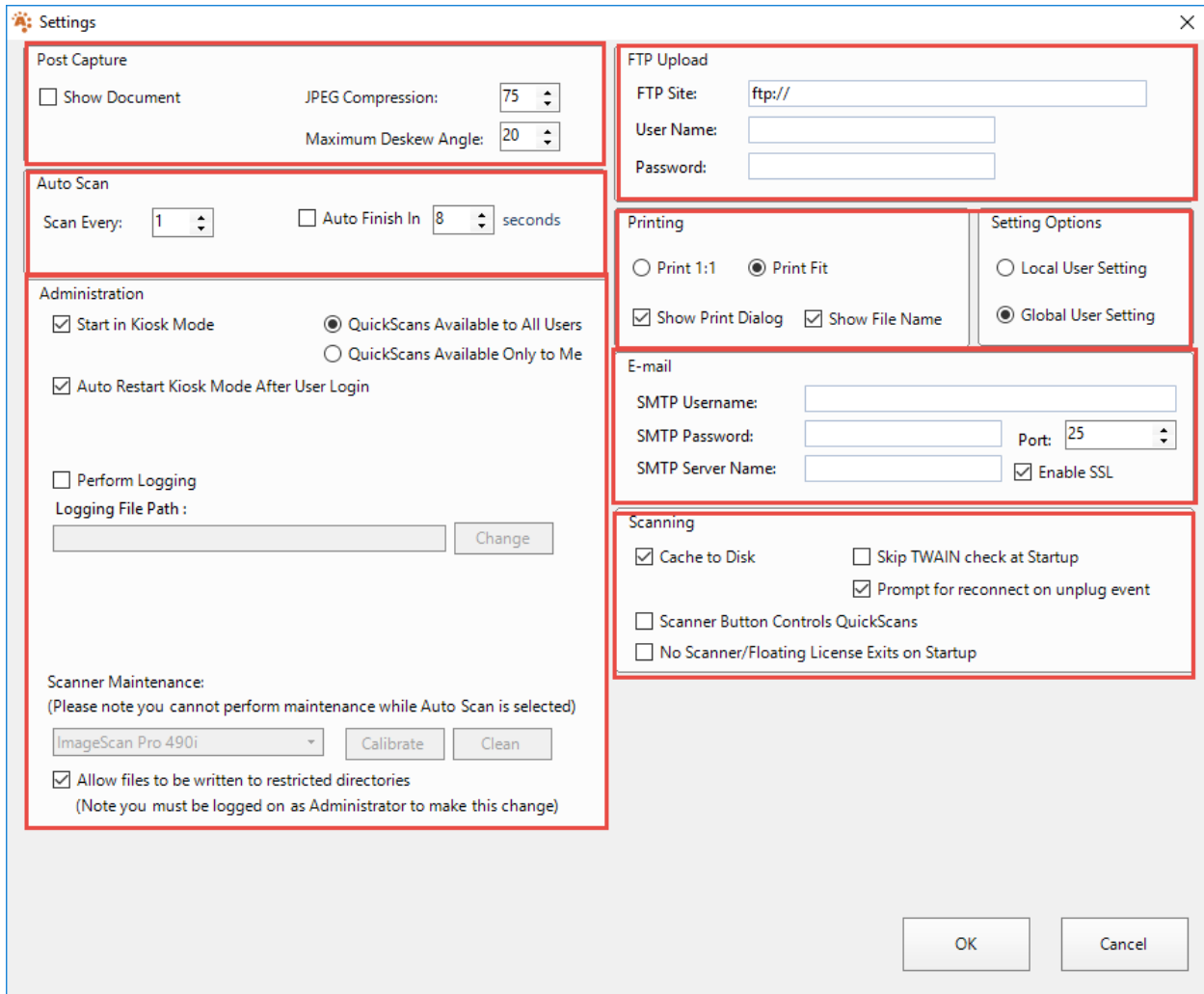
From AmbirScan for Athena Interface

1. **Right-click** on the AmbirScan for Athena icon in the system tray.
2. Select **Show**.
3. Click on the **AmbirScan icon** in the top left corner of the screen.
4. Click **Settings**.





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The screenshot below displays the default settings in the **Settings** Menu:

Post Capture section

Show Document: When enabled, the document will open on your screen after scanning, in the application specified by Windows for the file type of the scanned document. This function is only available when using a QuickScan that it setup to save a local copy.

Auto Scan Section

Auto Scan (default): Any card/document inserted into the selected scanner will be pulled through automatically.

Note: Do not adjust these settings unless directed by Ambir Support.



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Administration Section

Start in Kiosk Mode (default): AmbirScan for Athena runs in the system tray.

Auto Restart Kiosk Mode After User Login (default): Application will run in Kiosk mode after login.

QuickScans Available to All Users (default): All users will have access to all QuickScans.

QuickScans Available Only to Me: QuickScans created for use under specific profiles.

Perform Logging: Only use this function when directed by Ambir Support.

Debugging Console: Advanced functionality. Only for use when directed by Ambir Support.

Calibrate: Calibration should be performed when image quality degrades. Click [here](#) for details on calibration.

Clean: Along with calibration, cleaning should be performed when image quality degrades. Click [here](#) for details on cleaning.

Scanning Section

Cache to Disk (default): Function enabled by default for batch document scanning; disable only if advised by Ambir support staff.

Skip TWAIN check at Startup: Prevents AmbirScan Connect for athenaNet from checking to see if a TWAIN device is connected to the computer.

Prompt for reconnect on unplug event (default): When enabled, AmbirScan Connect for athenaNet will display a message when the TWAIN source (scanner) is not detected by the computer.

FTP Section

FTP Upload: A copy of the document will also be uploaded to a set FTP location.

Printing Section

Print 1:1 (default): Print the actual size of the document.

Print Fit (default): Scales to the size of the sheet.

Show Print Dialog (default): Displays the print screen.

Show File Name (default): Displays the file name.

Email Section (this function is available when using a QuickScan that is setup to save a local copy)

SMTP Username: Enter your SMTP username.

SMTP Password: Enter your SMTP password.

SMTP Server Name: Enter the server name for your email.

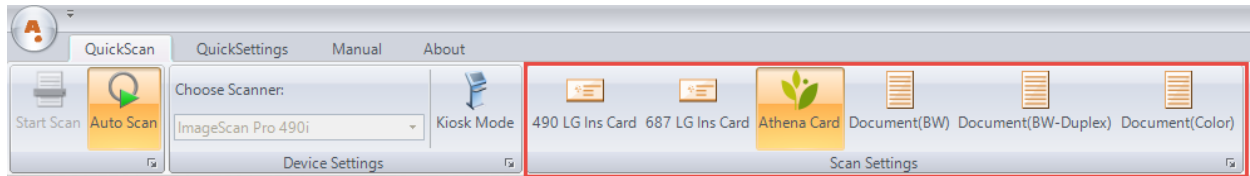
Note: Only SMTP email configurations are supported.



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QuickSettings

AmbirScan for athenahealth has six QuickScan settings for various scanning needs. Below is a screenshot with the descriptions of each QuickScan:



DS490 LG Ins Card: For use with the DS490i/DS490ix scanners. Use this setting if scanning large insurance cards.

DS687 LG Ins Card: For use with the DS687/DS687ix scanners. Use this setting if scanning large insurance cards (which may be folded in half).

Athena Card: Default selected QuickScan. Duplex (double sided) scans of insurance cards and IDs for importing into athenaNet.

Document (BW): Scans simplex (single sided) documents in black and white.

Document (BW Duplex): Scans duplex (double sided) documents in black and white.

Document (Color): Scans simplex (single sided) documents in color.



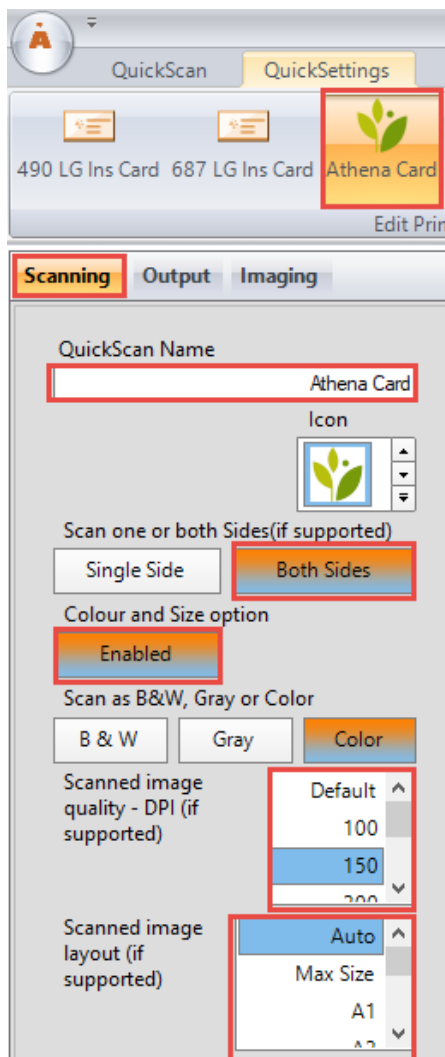
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QuickSettings Menus

The **QuickSettings Tab** contains several sub-menus for settings for each QuickScan: **Scanning, Output, Imaging**. The following sections describe each of these menus in further detail for Card and Document QuickScans.

Athena Card – Scanning

The screenshot below displays the default settings for the **Card QuickScan Scanning Menu**:



QuickScan Name: Name of QuickScan (Athena Card).

Both Sides: Selected for double sided scanning (default for Athena Card scans).

Colour and Size Option: Enabled (default). Locks the color and size option for scanning.

Scanned image quality – DPI: Image scan quality. The default for Card scans is color, 150 DPI.

Scanned image layout: The sizes of the media you are scanning. Auto is the default selection for Card scans.



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Athena Card – Output

The screenshot below displays the default settings for the **Athena Card QuickScan Output Menu**:

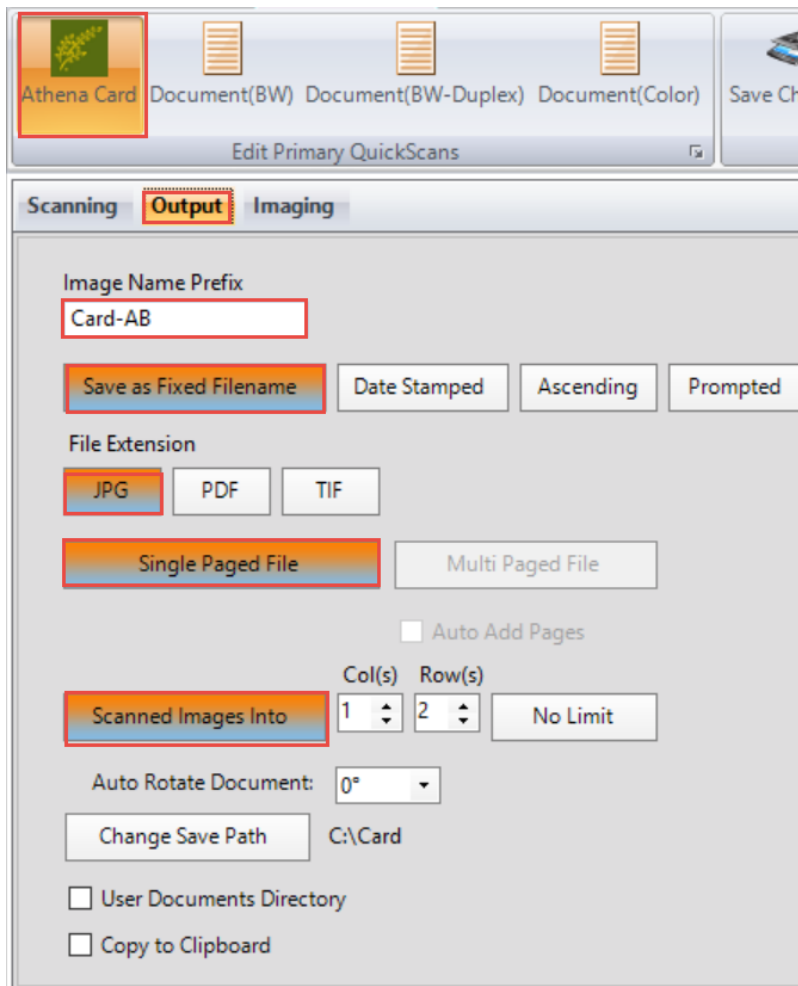


Image Name Prefix: The Card QuickScan default prefix name is Card-AB.

Save as Fixed Filename: All scanned cards will receive the name Card-AB. This means each card scan will overwrite the previous.

File Extension: Card scanning default is JPG.

Single Paged File: Scans images into a single page.

Scanned Images Into

Col(s): Number of columns to be displayed in the file.

Row(s): Number of rows to be displayed in the file.

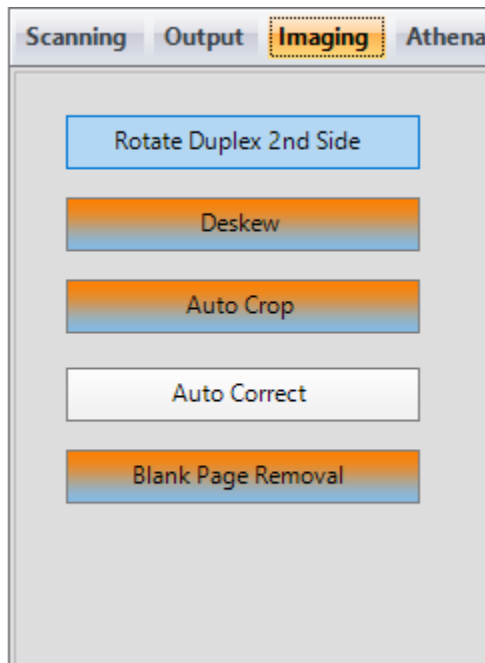
Change Save Path: The default save location for the Card QuickScan is C:\card.



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Card – Imaging

The screenshot below displays the default settings for the **Card QuickScan Imaging Menu**:



Rotate Duplex 2nd Side:

Deskew: Removes rotation from the scanned media.

Auto Crop: Removes black borders from the edge of the scanned media.

Auto Correct: Stretches Contrast.

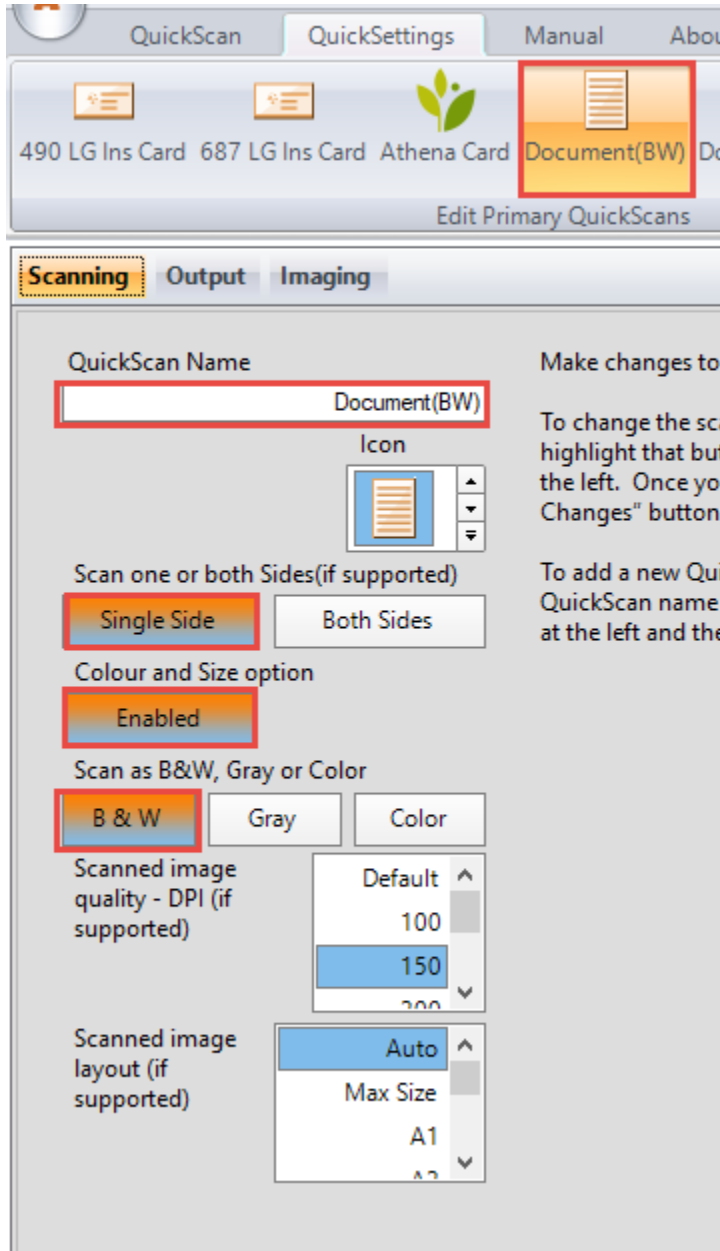
Blank Page Removal: Removes blank pages. *This feature is only available for Grayscale and Color scanning.*



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Document – Scanning

Below is a screenshot of the default settings of the **Document(BW)** QuickScan Scanning menu:



⚠ Please note the settings for each Document QuickScan will vary, depending on their specific functions and color scans.



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Document – Output

The screenshot below displays the default settings for the **Document(BW-Duplex) Quickscan Output Menu**:

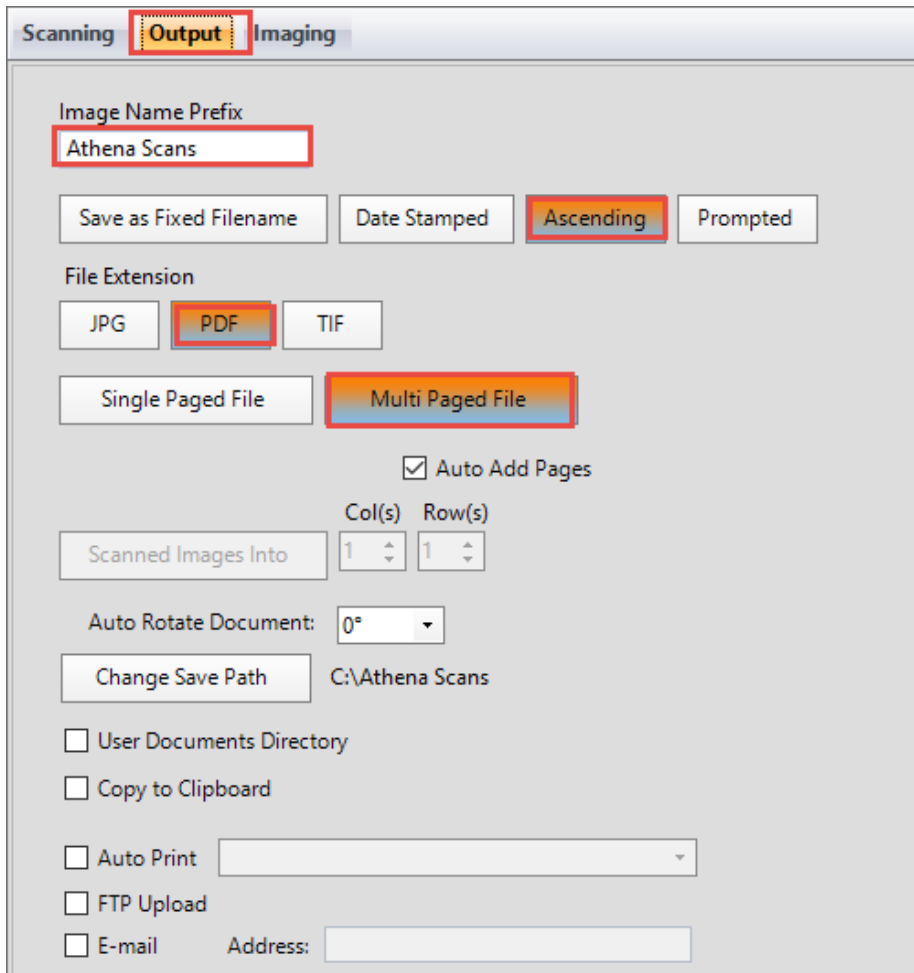


Image Name Prefix: The default prefix for document scans is Athena Scans.

Save as Fixed Filename: Ascending is the default setting for Document QuickScans.

Auto Rotate Document: Adjust the rotation of the document.

Single Paged File: Creates a single file for a single page scan.

Multi Paged File: Allows scanning of multiple paged documents to be saved in one file (default setting)

Auto Add Pages: When enabled, allows users to add pages to a multi-page document scan.

Change Save Path: The default location for Document QuickScans is C:\Athena Scans. Click on the Change Save Path button to change the default location.

User Documents Directory: Select a path if you wish to save documents locally.

Copy to Clipboard: Saves image to a clipboard.

Auto Print: Allows you to print your image after scanning. When selected, chose your printer from the drop down.

FTP Upload: Will upload to your selected FTP location as specified in Settings.

Email: Enter an email address you wish to send to.



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Troubleshooting and Technical Support

Please visit our AmbirScan for Athena page (www.ambir.com/athenahealth-setup) for additional support videos and answers to the most common questions.

For technical support with your AmbirScan for athena software, please contact Support at (630) 530-5400, option 3 or chat with us online.