DeliverHealth

eScription One ShadowPrint

User Guide

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Introduction

ShadowPrint is the automated printing feature of the eScription One Transcription platform. When transcriptions reach a pre-defined trigger point in the InQuiry workflow, a ShadowPrint Rule can be triggered that will print the transcription to the client's printer defined in the Rule. An InQuiry user isn't required to manually print the transcription.

For example, a hospital implements ShadowPrint under the following scenario. The hospital has six document types, which are a mixture of inpatient and outpatient reports. They want them printed in various locations depending on these circumstances:

Document Type	Where to Print	When to Print		
		Delivered by MTSO	Signed by Dictator	Completed from Final Folder
Inpatient				
Progress Notes	Patient's Floor Printer	X		
	Medical Records – Printer 1 for chart		X	
Consultation	Patient's Floor printer	X		
	Medical Records– Printer 1 for chart		X	
	Dictator's staff office		X	
	Medical Records – Printer 2 for mailing to Associate on transcription.		X	
Pre-Op H&P	Surgery Pre-Operative area	X		
	Medical Records – Printer 1 for chart		X	
	Clinic – Printer 2 for shadow chart.		X	
Outpatient Clinic				
Initial Visit	Medical Records – Printer 1 for chart		X	
	Clinic – Printer 1 for mailing to Associate on transcription.			X
	Clinic – Printer 2 for shadow chart.		X	

Follow-up Visit	Medical records – Printer 1 for chart	X	
	Clinic – Printer 2 for shadow chart.	X	
Letter	Dictator's staff office		X

ShadowPrint can handle all these requirements.

The purpose of this User's Guide is to review the proper setup of ShadowPrint using the above examples. It will cover:

– Defining, installing, and configuring the ShadowPrint Service - the eScription One software to be installed on the client's PC or Server ("workstation") that retrieves transcriptions from the eScription One server and prints them.

– Configuring the Rules that define what to print, where to print, and on which printer.

– Managing ShadowPrint - the tools that are available in InQuiry to monitor printing, determine if problems exist, and resolve them.

– Some advanced options that may be utilized in special circumstances.

Requirements

For ShadowPrint to work properly within your environment, the following software and hardware requirements must be met.

Note: Macintosh or Apple computers are NOT supported by eScription One.

Minimum Requirements:

– Server 2019 or Windows 10

Note: For Windows 98, 2000, NT4, XP, Vista, Windows 7, and Windows 8.1 users, eScription One does not support any version of Windows prior to Windows 10. Please upgrade Windows before calling eScription One.

– RAM: 1 GB or more

– .Net Framework 4.7.2 (Our application will attempt to install this if not currently installed.)

– Hard Drive Free Space: 2 GB

– Internet Bandwidth: 3 Mbps download/1 Mbps upload

Recommended Requirements:

– Server 2019 or better or Windows 10 (or higher)

– RAM: 4 GB or more

– .Net Framework 4.7.2 (Our application will attempt to install this if not currently installed.)

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– Hard Drive Free Space: 2 GB

– Internet Bandwidth: 3 Mbps download/1 Mbps upload

Notes:

- Processor: 1 GHz or faster (32 or 64-bit Architecture)
- Virtual machines are supported for use.
- Printers must be installed by the customer on the VM that hosts ShadowPrint.
- ShadowPrint service account requires permissions to access all printers and as such the windows service must be logged in as a local or domain account with the appropriate permissions.
- Communicates over port 443 to https://shadowlink.escription-one.com and https://mobile.escription-one.com.
- Can be on the same server as ShadowLink.
- Windows updates are managed by the customer. The customer is responsible for ensuring application is running after a reboot.

Setup Overview

ShadowPrint setup is straight forward and requires five basic steps.

1. Create one or more Service accounts.

    o The Service account is an ID and password that the ShadowPrint Service, which runs on the client's workstation, will use to log into the EScription One ShadowPrint servers.

2. Install the ShadowPrint Service application.

    o This involves downloading ShadowPrint and installing it on the client's workstation.

    o Login to the ShadowPrint service with the ID and password.

    o Selecting which of the printers will be used for ShadowPrint. The printers should already be installed on the client's workstation, but new printers can always be added.

3. Configure Printer Options for the Service.

4. Create the Rule as to what, when, and where to print.

5. Manage the print jobs.
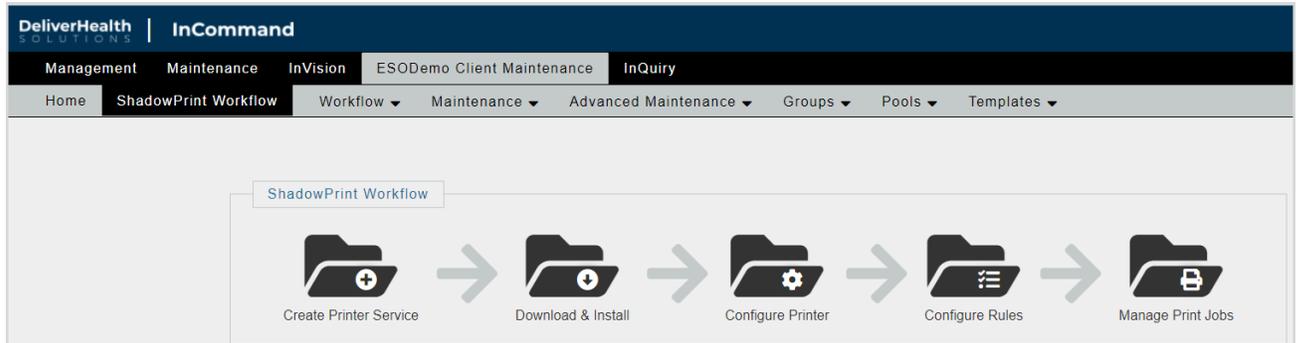
Accessing ShadowPrint Menus

ShadowPrint is available to existing and new clients. It can be accessed from either InCommand or InQuiry, with the proper setup.

InCommand Setup to access ShadowPrint

For the InCommand user to set up and modify ShadowPrint Services and Rules, they will need Security access to the Client Maintenance Tab.

This is accomplished in the Maintenance Tab. Select the Transcriptionists sub-tab; select the user and then the Edit <User> command.

Turn on **Client Maintenance Tab** under the InCommand Security Roles section.

If this same InCommand user needs to monitor ShadowPrint jobs, they will also need the **InQuiry Tab** security role enabled.
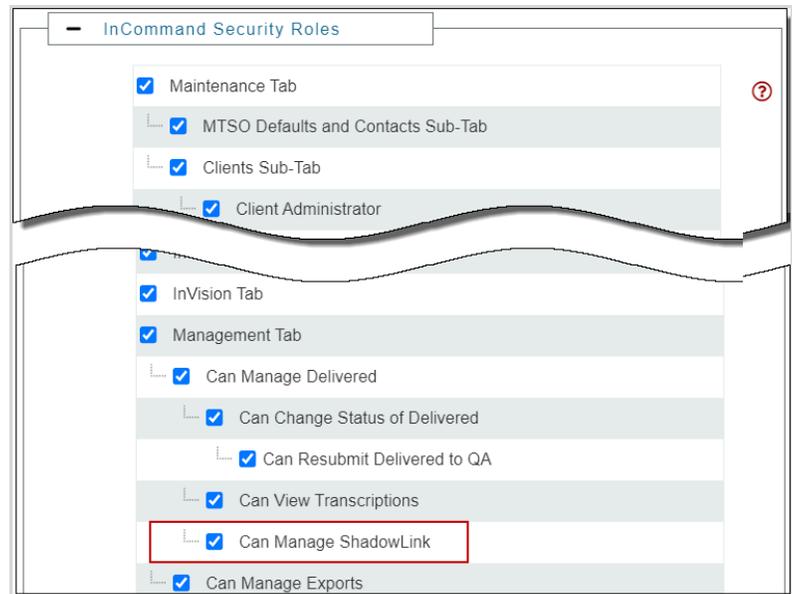
InQuiry Setup to access ShadowPrint

There are two levels of ShadowPrint access for the InQuiry user.

The first is access to the ShadowPrint tab which allows the InQuiry user to see the status of ShadowPrint jobs. This is appropriate for staff members who will be processing the printed output. It allows them to see if any print jobs haven't been printed and the reason for the failure.

In the InQuiry user setup, turn ON **Access to ShadowPrint Management** under the Access Rights section (Client Maintenance> User Groups).

Access Rights	
Attribute	**Group**
Edit Header After Authentication	☐
Unrestricted Edit After Authentication	☐
Add Associate to Database	☐
Can Print Originals	☐
View ~~Comments~~	☐
Access to Fax On Demand	☐
Access to Problem Lists	☐
Edit Problem Lists	☐
Access to ShadowPrint Management	☑
Restore/Administrative Log View	☐
Access to ShadowLink Management	☐
Show Download Icon in Preliminary Folder List	☐
Show Download Icon in Transcription Viewer	☐
Default Download Format	PDF ˅

The second level of access is for the IT person who will be creating the ShadowPrint Services and Rules. This provides the same level of access as an InCommand User. With this option, your client can manage all aspects of configuring and managing ShadowPrint.

This option gives the InQuiry user a **Maintenance** command on their InQuiry home page, that when clicked, links them to Client Maintenance where they can access the ShadowPrint maintenance menu.

This is the same Client Maintenance area as for InCommand users. With only **Maintenance – ShadowPrint** selected, they are limited to only the ShadowPrint configuration area.

Maintenance Access	
Attribute	**Group**
Maintenance - Client Defaults	☐
Maintenance - Associates	☐
Maintenance - Documents	☐
Maintenance - Users	☐
Maintenance - Templates	☐
Maintenance - Interfaces	☐
Maintenance - ShadowPrint	☑
Maintenance - Groups	☐

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Client Maintenance

ShadowPrint configuration is done in the Client Maintenance tab. This is available to either an InCommand or InQuiry user with the proper security roles.

Select the Advanced Maintenance sub-tab and hover over ShadowPrint to expand the three ShadowPrint selection items.

– Workflow - Links you to the ShadowPrint Workflow sub-tab, which shows a graphical representation of the five steps to configure ShadowPrint. You can jump to each step by clicking on the corresponding picture.
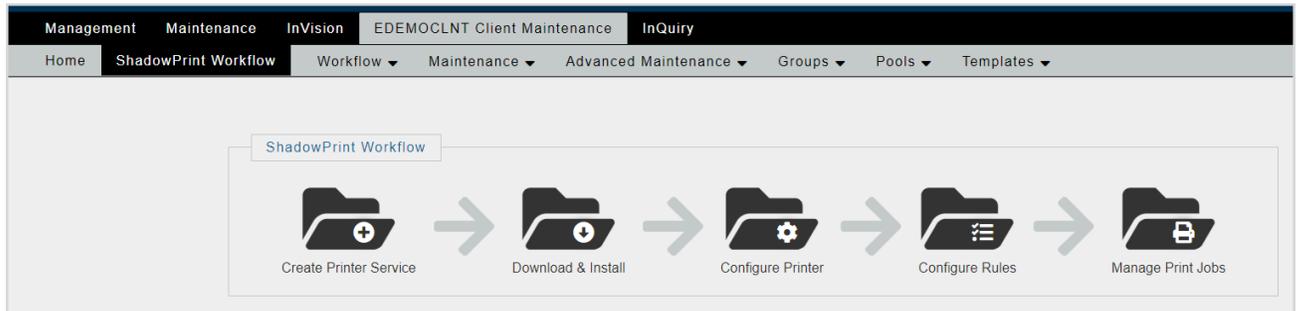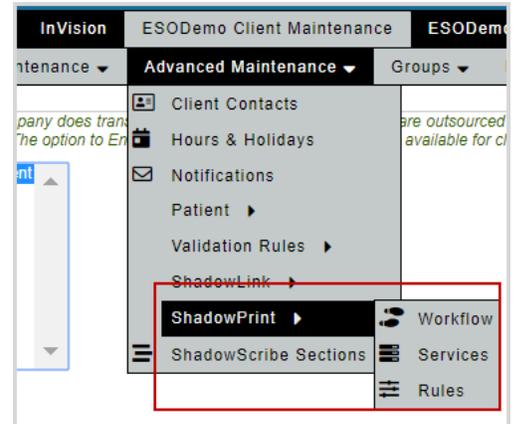
– Services – Create and edit ShadowPrint services and configured printers.

– Rules – Create and edit ShadowPrint rules, which determine what jobs to print, when and where.

Basic Configuration

Create a ShadowPrint Service

A ShadowPrint service must first be created to attach printers and rules to. Navigate to the ShadowPrint Workflow diagram and click the Create Print Service icon or choose Services from the ShadowPrint menu.

Each ShadowPrint service can host multiple printers. Each client can have multiple services if needed. We recommend using one service for each facility location (such as West Clinic, East Clinic, etc.) or department (such as Pediatric, Oncology, etc.). The implementations team can help determine what setup is best for your facility.

To create a new service, click the Add New Service command.

Enter the Service Configuration information in the window on the right.

– Service ID: This ID will be automatically generated when the new service is saved.

– Service Name: A short name (50 characters max) for the Service running on the client's workstation. It is used to identify the Service in various places in the ShadowPrint setup. Please use descriptive names to make identification easier, such as:

o Dr. Smith's Office	o HIM – Associate Letter (tray 2)
o Pediatric Clinic	o Surgery Pre-Op area.
o HIM – Chart Copies (tray 1)	o Inpatient 2E (or Inpatient Floor 2, East Wing)

– Service Description: Provides 500 characters in which to better describe the service. This is a good place for IT to keep notes about this service for future reference.

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– Service Active – Will be on by default. If a service is no longer needed, temporarily or permanently, uncheck this box.

– Login – Create a unique login ID for the ShadowPrint Service to be running at the client's site. It can be as simple as SP1, SP2, etc. The system will not allow you to use a Service Login that already exists.

– Password – Create a password to be used with this login ID.

– Notification E-Mail – enter an email address for the staff who will handle printer problems. Multiple email addresses can be entered by separating them with a semi-colon (";") character. An email will be sent when ShadowPrint detects problems with the printer or service.

Click the Save button to save the new service.

The Service now shows up in the ShadowPrint Services box. Displayed are the Service Name and the Service Login ID.

Additional commands are available for the selected service.

Edit <Service Name> Allows you to update the information about the defined Service, including the ID, password, or release the client's PC to use the Service on another PC.

View Rules on <Service Name> Links to the rules defined for the selected service.

To display additional services that have been disabled, check the Show Inactive Services checkbox. Inactive services will then be listed in gray text in the Services box.

Download & Install Printer Service

With the Service defined, the ShadowPrint application needs to be downloaded and installed on the client's PC. This must be a PC that has access to the printers to be used by ShadowPrint.
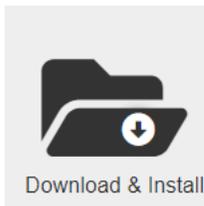
Download & Install

From the ShadowPrint Workflow screen, click on the Download & Install Printer Service icon. This links you to the eScription One software site.

Alternatively, you can navigate to one of the following links for your region:

– **Australia** https://www.escription-one.com.au/Software/ShadowPrint/

– **Canada** https://www.escription-one.ca/Software/ShadowPrint/

– **United States** https://www.escription-one.com/Software/ShadowPrint/

Click on the ShadowPrint install link to download the installer.

After the installer has downloaded, click on the ShadowPrintSetup.exe file to begin the installation. Follow the on-screen instructions to install.

Log in to the ShadowPrint Service

If the ShadowPrint console is not already open, select **ShadowPrint Configuration** from the Windows startup menu, or search 'ShadowPrint' in the Windows search box.

Administrator rights are required to run the application.
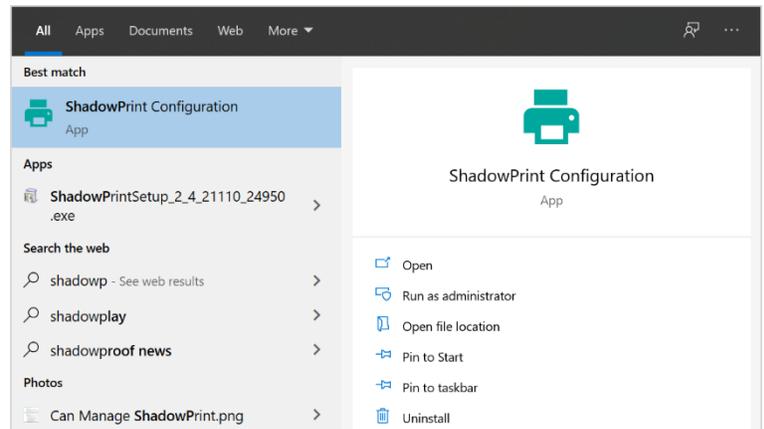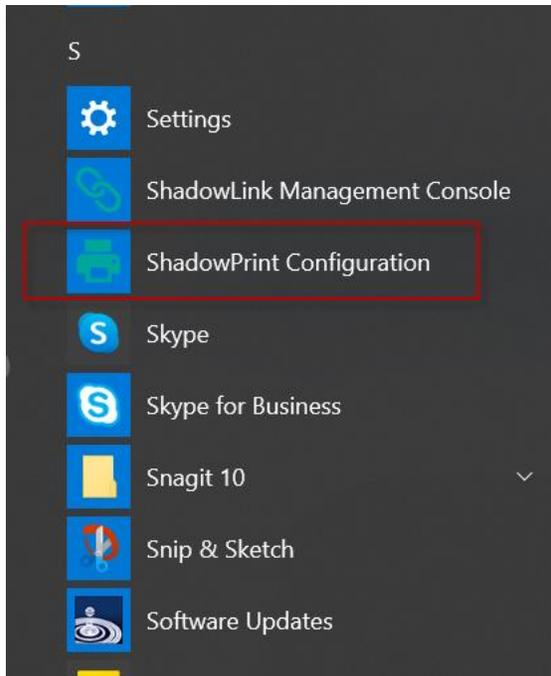
Once open, the ShadowPrint application icon appears in the system tray:

Selecting a Region

Before the management console opens for the first time, you must select your region from the drop-down list.
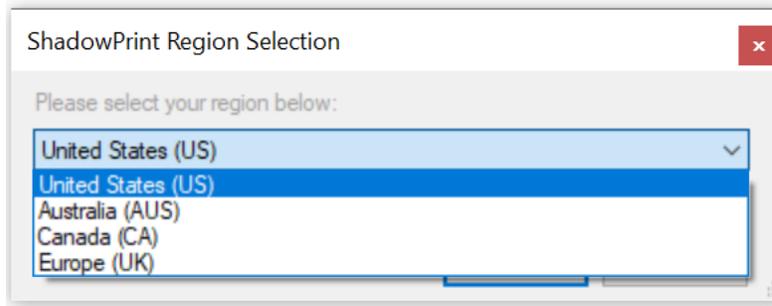
At the Configuration window, enter the Service Login ID, Password, and Client (see Create a ShadowPrint Service Click the Login button.
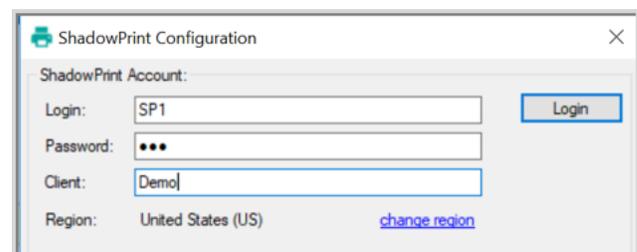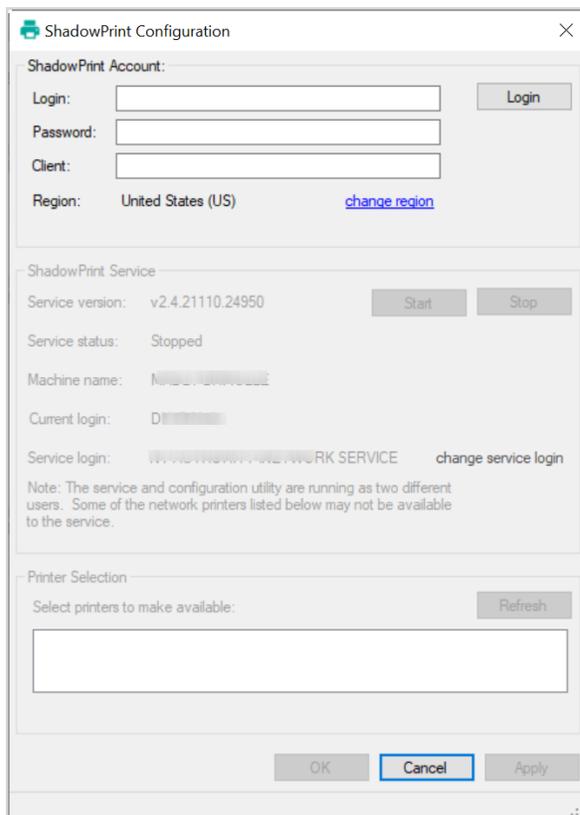
After the ShadowPrint Service connects to the server and authenticates the login information, a pop-up will appear asking if you would like to start the service. Press Yes. Alternately, you can press the Start button to start the service.

After the Service has started, select the printers that will be used from the Printer Selection box. This list contains all printers that are installed on this machine. Press Refresh to update the list. Select a printer by checking the box next to the printer name.

Note: Only select physical printers. ShadowPrint is not compatible with virtual printers such as utilities to create .PDF files or Microsoft XPS documents.

Click the Apply button to save the configuration, then the OK button.

The ShadowPrint Service is now installed and configured on the PC or Server.

You can now close this window. The ShadowPrint Service is running on the workstation. The configuration console does not need to be open for the service to continue running.

The ShadowPrint management console has additional information and configuration options available as well.

– Service version: The ShadowPrint software version number.

– Service status: Status of the ShadowPrint service. The status must be "Running" for ShadowPrint to work.

– Machine name: The name of the workstation that the ShadowPrint service is running on. The machine name must match between the ShadowPrint Configuration console and the service configuration in InCommand. This value will be auto-populated in the console and in the InCommand service screen upon the first login to the service. See 'Moving ShadowPrint' on page 25 for more information.

– Current login: The machine login profile.

– Service login: An alternate login method if the traditional method does not work. Only change this setting if instructed by support or implementation staff.

Configure Printer Options

After logging into the ShadowPrint service and selecting printers in the management console, additional ShadowPrint configuration can be completed in InCommand > Client Maintenance > Advanced Maintenance > ShadowPrint > Workflow.

To configure printer options, click the Configure Printer Options icon from the ShadowPrint Workflow screen.

When the ShadowPrint Service authenticated with the eScription One servers, the list of selected printers in the console was also uploaded. These printers can now be configured to define when they should queue and print jobs.

Select the ShadowPrint Service in the top box.

All printers linked to that service (from the Management Console) will appear in the Printers Configured box below. Select the printer you would like to configure and press Edit Printer Setup.

The Edit Printer window will display all informational and configurable fields for the selected printer.

– **Printer Name:** The name of the printer can be edited. A descriptive name helps identify the printer. The default value is the system printer name.

– **Printer port (path):** Provides the system printer name used by the machine running the ShadowPrint service.

– **Printer Model:** The make and model number of the printer.

– **Schedule:** Defines when this printer can be used.

  o   The queue schedule drop-down box provides two options to determine if print jobs can be queued outside of active printing hours.

      ▪ **Queue but do not print jobs outside of schedule:** If a ShadowPrint rule is triggered outside of the active printing schedule for the day, print jobs will be queued; when active printing schedule begins again, the queued jobs will spool to the printer.

ShadowPrint Services

drw (drwprint)
test (test)

☐ Show Inactive Services

➕ Add New Service

✎ Edit drw (drwprint)

≔ View Rules on drw (drwprint)

Printers Configured

Printers for selected service.

PDF
Send To OneNote 2016

🖨 Edit Printer Setup

👣 Show ShadowPrint Workflow

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- **Do not queue jobs outside of schedule:** If a ShadowPrint rule is triggered outside of the active printing schedule times, print jobs will not be queued. No additional action is taken when the active printing schedule begins again.

  o **Daily Schedule:** This allows you to set an active printing schedule for each day of the week. The default schedule is 24 hours per day, every day of the week. All print jobs are held in the queue until the printer is scheduled to resume printing.

    - To disable printing for a specific day, uncheck the selection box in front of the day.

    - To limit printing for any day, enter the start and end times.

  o **Continue printing queued transcriptions after <end time>:** This determines what happens if a print job is queued just before the end of the active printing schedule. Turn on to allow these few transcriptions to print past the end time. Otherwise, they will print during the next scheduled print time.

– **Spool Limit:** The maximum number of print jobs the service can download from the server and spool to the printer.

  o Spooling means the service sends the transcription to the Microsoft Operating System to print. The operating system temporarily stores the files before sending them to the printer, and the printer may have memory to temporarily store the file while another job is printing.

  o If transcriptions are not being printed after they have been spooled, or partially printed, reduce the Spool Limit.

Continue printing queued transcriptions after End time – this determines what happens if the transcription is triggered ("queued") to print just before the end of the allowable printer schedule. Turn on to allow these few transcriptions to print past the end time. Otherwise, they will print during the next scheduled printer time.

save   Click the Save button to save your Service/Printer Configuration.

Configure Rules

Rules define what transcription to print (based on document type, location, and user), where to print (the Service and Printer) and when to print (after being completed form which workflow folder).

To configure rules, click the **Configure Rules** icon from the ShadowPrint Workflow screen, or select the Advanced Maintenance sub-tab (in Client Maintenance Tab), hover over ShadowPrint and click on the **Rules** command in the pop-up menu.

Please note the options on this window.

ShadowPrint Rules

Show Rules for Service All Services

test

☐ Show Inactive Rules

+ Add New Rule

✏ Edit test

📋 Copy test

👣 Show ShadowPrint Workflow

Show Rules for Service: Filter the based on the ShadowPrint service(s) it is assigned to. By default, all rules are shown. Select a service from the drop-down to only display rules assigned to that service.

Show Inactive Rules: Include inactive rules in the Rules list (in gray text).

Add New Rule: Create a new ShadowPrint rule.

Edit <rule name>: Edit the selected rule. This option only appears if one or more rules exist.

Copy <rule name>: Copy the selected rule and settings to a new rule. This option only appears if one or more rules exist.

Show ShadowPrint Workflow: Links you back to the ShadowPrint workflow diagram.

Click **the Add New Rule** command.

Each ShadowPrint rule consists of seven sets of configurations. These configurations determine which transcriptions will be printed by ShadowPrint, which printers to print to and what time to print them.

Rule Information

– **Rule ID:** A system assigned number to uniquely identify the rule.

– **Rule Name:** Assign a descriptive but brief name. This name will be used on subsequent screens.

– **Active:** On/Off switch for the rule. If a rule is no longer needed, temporarily or permanently, deactivate the rule by unchecking the box.

Printer Selection

– All active ShadowPrint services are listed here, along with their corresponding printers.

  o Press Expand All to display the printer list for all services.

  o Press Collapse All to hide the printer list for all services.

  o Press the Plus/Minus box next to each service to expand/collapse individual printer lists.

– Select the printer(s) you would like transcriptions to be printed to when the criteria of this rule are met.

Note: you can print to more than one printer in a given rule. You can also print to printers defined across different services.

Options

– **Priority:** Transcriptions queued with a higher priority are printed first (1 is the highest priority 10 is the lowest; 5 is the default priority setting and is considered normal.)

– **Number of Copies:** Select the number of copies of the transcription to print.

– **Print Type:** This provides the ability to have different headers and footers based on what printed transcription is being used for as well as determine a minimum number of copies printed. Each header/footer type can setup on the document type level in Client Maintenance.

- o Standard - Prints the original transcription; typically to be filed in the patient record.

- o Clinician - prints a copy for every clinician on the transcription.

- o Associate - prints a copy for every external associate on the transcription.

– **Watermark:** Allows for an override of the default watermark assigned to the document type.

- o Do not Override - The document type's default watermark will apply.

- o Copy- Transcriptions always print with the word "Copy" watermarked, regardless of the watermark setup for the document type.

- o None – Transcriptions will always print with no watermark, regardless of the watermark setup for the document type.

- o Preliminary - Transcriptions will always print with the word "Preliminary" watermarked, regardless of the watermark setup for the document type.

Managing Print Jobs

Once ShadowPrint is configured, it can be managed in the Services tab in InQuiry.

For an InQuiry user to see the ShadowPrint tab, the **Access to ShadowPrint Management** option under the Access Rights section of their user setup must be turned on.

Please note, access to this tab allows the InQuiry user to see the ShadowPrint status of every transcription for every Location. Therefore, this is only appropriate for staff members who will be problem solving printing issues or who need to research the history of printing.
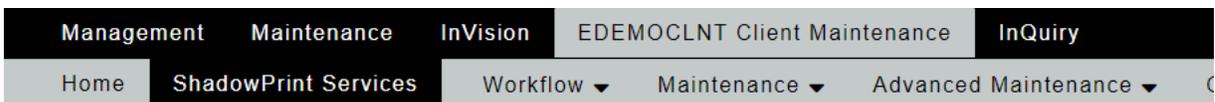
When a user enters InQuiry, they will need to navigate to the **Services** tab. A Summary tab will appear with a count of active services (this could include Fax, ShadowPrint and ShadowLink depending on your access and the services your client uses). The ShadowPrint summary shows the number of active services and queued print jobs. Three additional sub-tabs will appear when hovering your mouse over the ShadowPrint tab and can be opened by clicking on them.

– **Services** - Displays the status of each ShadowPrint service, organized by Service, each Printer defined in the Service, and the Rule that created the print request.

– **Rules** - Presents an overview of all active ShadowPrint rules and printers used by the rules.

– **Transcriptions** - Provides detailed information about the status of print jobs.

Services sub-tab

The Service tab opens with a collapsed view of each ShadowPrint Service. The information in this sub-tab can be refreshed by clicking on the ShadowPrint Services tab. The summary line provides the following information:

– Service name and service login name.

- o Clicking the service name will open the Transcriptions sub-tab and return a query of all jobs in a Failed, Queued, or Spooled status for that service.

– Printing Status and Pause/Resume printing.

- o Printing – ShadowPrint will print jobs within the configured active printing hours.

- o Printing Paused – ShadowPrint will queue jobs but they will not be printed until the status is resumed.

- o Clicking on the status will toggle between Printing and Printing Paused.

– Service Status provides the current status of the service and the date/time stamp of the last activity on the service. The different statuses are:

- o   Connected and active – The service is logged in at a ShadowPrint console and is receiving activity.

- o   Connected and inactive – The service is logged in at a ShadowPrint console but has not had activity in at least 15 minutes.

- o   Disconnected – The service is not currently logged in at a ShadowPrint console.

– # Queued – The number of Queued jobs that have been triggered to print but haven't yet been retrieved by the Service to be printed.

- o Clicking on Queued will open the Transcriptions sub-tab and run a query for all Failed and Queued jobs for that service.

– # Spooled – The number of print jobs that have been retrieved by the Service and "spooled" for printing, which means they have been sent to the Operating System of the server to be printed. As almost all applications today, ShadowPrint doesn't access the printer directly, it accesses the operating system, which in turn manages the printing.

     o   Clicking on Spooled will open the Transcriptions sub-tab and run a query for all Failed and Spooled jobs for that service.

– Last Printed - The data and time when the last job was spooled to a printer.

Additional service details can be obtained by expanding the service row with the ⊞ button. The service is then broken into two sections for Details and Printers, which can both be expanded even further details. *****

⊟ Smith Office (aemqa1)	Printing ⏸ pause	❗ Connected (Last Activity: 8/5/2013 6:10:54 PM)	[257 queued, 0 spooled, Last Printed: 8/5/2013 11:16:50 AM]
⊟ Details			
Description:	Office of Dr. Smith		
Workstation:	TAL-PC		
Local IP Address:	172.21.1.133		
Notification Email:	fake@emdat.com		
⊞ Printers			

Open the Printers section to see all the printers.

Each printer has a:

– Details section - that when opened will provide the basic information on the printer.

– Rules section - that when opened will list every Rule that uses this printer on this Service. Opening the specific Rule shows basic Rule configuration.

⊟ Smith Office (aemqa1)	Printing ⏸ pause	❗ Connected (Last Activity: 8/5/2013 6:10:54 PM)	[257 queued, 0 spooled, Last Printed: 8/5/2013 11:16:50 AM]
⊟ Details			
Description:	Office of Dr. Smith		
Workstation:	TAL-PC		
Local IP Address:	172.21.1.133		
Notification Email:	fake@emdat.com		
⊟ Printers			
Cal's Printer			[257 queued, 0 spooled, Last Printed: 8/5/2013 11:16:50 AM]
HP LaserJet P2035n			[0 queued, 0 spooled, Last Printed: Never]

Only the basic information for the Printer and Rules are shown for problem solving.

On the line with the Printer Name:

– The Printer name is a link to the Transcriptions sub-tab with a query for printer job statuses of Failed, Queued or Spooled, for this Service and Printer and any Rule that uses this Service/Printer combination.

– On the far right is the number of Queued and Spooled transcriptions along with the last date/time a transcription was printed on this Service / Printer.

– The number Queued and Spooled are also links to the Transcriptions sub-tab with the Status selected of Queued or Spooled respectively and this Service / Printer selected in the Search area.

On the Rule name line, the Rule name, number Queued, and number Spooled are also links to the Transcription sub-tab with appropriate Search criteria already selected.

The purpose of the Service sub-tab is to provide a high-level overview of the status of print jobs, starting with the service. This drill-down problem solving provides a quick way to determine the root of any problems.

Home	Archive	Workflow	Problem List	Faxes	Services	InVision	My Templates
Summary		Faxes ▼	ShadowPrint ▼		ShadowLink ▼	ShadowPrint Rules	

⑦ help

⊞ Prelim & Final	[0 queued, 0 spooled]
⊞ Preliminary	[0 queued, 0 spooled]
⊞ Review 1 Clinician	[257 queued, 0 spooled]
⊞ test	[0 queued, 0 spooled]
⊟ Test Rule1	[81 queued, 0 spooled]

⊟ Details

Default Priority:	5
Reprint On Edit:	✗
Copies:	1
Copy to Print:	Use Standard Headers and Footers

⊟ Printers

HP Deskjet 5700 Series (HPA) on aemqa3	Offline	[81 queued, 0 spooled, Last Printed: 12/21/2009 11:25:17 AM]

Rules sub-tab

Home	Archive	Workflow	Problem List	Faxes	Services	InVision	My Templates
Summary		Faxes ▼	ShadowPrint ▼		ShadowLink ▼	ShadowPrint Rules	

⑦ help

⊞ Prelim & Final	[0 queued, 0 spooled]
⊞ Preliminary	[0 queued, 0 spooled]
⊞ Review 1 Clinician	[257 queued, 0 spooled]
⊞ test	[0 queued, 0 spooled]
⊟ Test Rule1	[81 queued, 0 spooled]

⊟ Details

Default Priority:	5
Reprint On Edit:	✗
Copies:	1
Copy to Print:	Use Standard Headers and Footers

⊟ Printers

HP Deskjet 5700 Series (HPA) on aemqa3	Offline	[81 queued, 0 spooled, Last Printed: 12/21/2009 11:25:17 AM]

The functions in the Rules sub-tab are the same as in the Service Status sub-tab. The only difference is this is organized by Rule. Under each rule are summary details of the Rule and which Printers are used by the Rule.

Clicking on the Rule Name, Printer Name, number Queued or Spooled will link to the Transcription sub-tab with the appropriate information pre-entered into the Search criteria area.

Transcriptions sub-tab

Once Services and Rules are set up, the ShadowPrint system runs unattended. However, problems can occur; a printer runs out of paper or is turned off, or the PC running the ShadowPrint Service is turn off over the weekend. The Transcriptions Tab is where to look for details on identifying errors.

A. Looking for Failed Print Jobs

When you click on the Transcriptions sub-tab, the Search area defaults to look for "Failed" status, across "All" Services, Printers, and Rules.

By clicking the Search button (or hitting the Enter key), the system searches for all Print Jobs that have Failed. You can further filter the search results by choosing additional search criteria.

Clicking on the icon in the View column brings up details about the:

– Print Job Status

– Transcription - TID, patient information, Clinician, Document Type.

– Transcription Activity - a ShadowPrint history off all print jobs for this transcription.

The activity includes all print jobs associated with this TID. In our example, we see that:

– Print Job 434247 successfully printed (blue outline) from Rule: ChrisM ReprintOnEdit.

– Print Job 429300 Failed to print (red outline) from Rule: TestRule1.

B. Actions for Failed Jobs

One of the immediate actions is to send this print job to another printer.

While in this window, select a new printer from the **ShadowPrint Service/Printer** drop-down box.

Change the Priority to force this to print before other queued print jobs.

Click the **Save** button.

A notification message will appear warning you a new print job will be created and the original will be canceled. Pressing Cancel will leave the print job in a failed state.

Press Ok. The print job has now been queued to another printer.
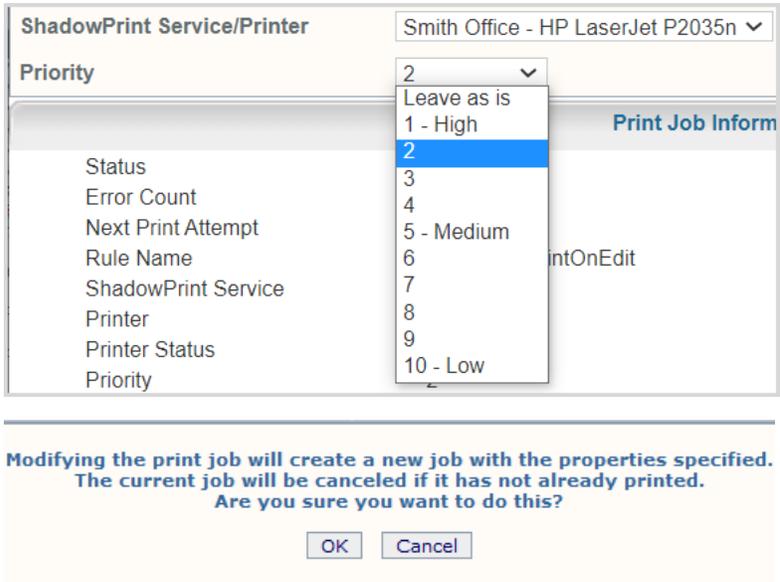
If we look at the status again, we see that the original Print Job has been canceled.

For single transcriptions this method of re-queuing to a different Service/Printer works fine. For multiple print jobs, this would be cumbersome. We can, however, send a large number of print jobs of to a different Service/Printer right from the Transcription Tab result screen.
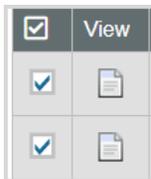
 On the left side of the Transcriptions search results, select individual transcriptions using the check box, or use the select all button to select all the print jobs in the search results.

 Click the **Modify Selected Print Jobs** button.

When the Window pops up change the **Service/Printer**.

Change the **Priority** to print these before other Queued Print Jobs on this Service/Printer.

Click the **OK** button.

All the selected Print Jobs are "Canceled" from their current assigned Service/Printer and are now "Queued" to their newly assigned Service/Printer.
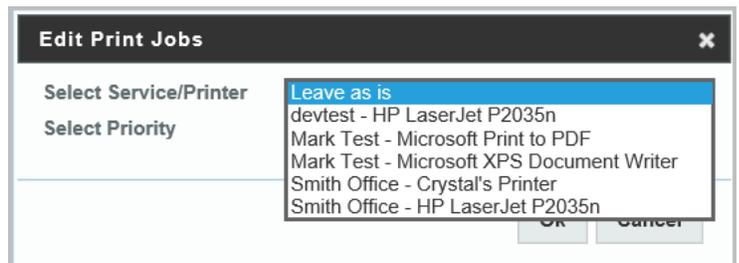
Note: The print jobs do not have to be in a Failed state to be requeued. You can select jobs that have previously printed and re-queue them to print on the same of different printer by using this same procedure.

 The **Cancel Selected Print Jobs** button will cancel any Print Job that is selected without queuing a new print job.

C. Other Troubleshooting Tips

Click on the Services sub-tab, expand the Service and the Printers section. Review the number queued and spooled and the date of the Last Printed job.

– Check the Service status to ensure it is running.

– Check for high numbers of queued and spooled jobs along with a Last Printed date/time that is old. This indicates the printer is not able to print.

– Check the active printing hours in Client Maintenance > Advanced Maintenance > ShadowPrint > Services > Printers Configured.

D. Print Job Status

Any ShadowPrint print job has one of six statuses.

– Pending - the transcription satisfies a Rule but hasn't reached the trigger point for the rule.

– Queued - the transcription has gone past the trigger point for a Rule. It is waiting for the ShadowPrint Service to retrieve the print job to spool to the printer.

– Spooled - the ShadowPrint Service has retrieved a print job and has sent it to the Server Operating System to be printed.

– Printed - The workstation's Operating System has reported back to the ShadowPrint Service that it has accepted the print job for printing.

– Failed - The print job has failed to print as reported by the workstation's Operating System.

   ShadowPrint will automatically re-queue this job for printing in five minutes. If it fails again, it will be re-queued to print in 10 minutes. This queuing for future printing doubles at each re-queue, until the timer reaches 2 hours.

   When the job is re-queued, the status is left as Failed. In essence, Failed is essentially the same as a Queued status, but with future printing.

– Canceled - The print job has been Canceled by a User action. The system cannot change the status to Canceled by itself.

Permanent Status - Printed and Canceled are considered to be permanent statuses. There is no future state for the print job once it reaches either Printed or Canceled.

– Permanent Status records are maintained in the Transcriptions tab for only 90 days. However, both of these permanent states are maintained in the transcription's Activity Log indefinitely.

Temporary Statuses - Pending, Queued, Printed, and Failed are temporary states. They are expected to change as the jobs move along the workflow or are manually changed.

– Print Jobs with these states are maintained in the Transcriptions tab indefinitely but are expected to evolve to a Permanent state in a short period of time.

– Once they evolve into a permanent state, these statuses for the print job disappear.

E. Other Transcriptions tab uses

While the focus of the Transcriptions tab is to find and manage Failed print jobs, it can have other uses. For example:

– Select Pending Status and Clinician to see what transcriptions need to be signed by the dictator. (This assumes the Rule trigger is based on completion from the Preliminary Folder).

– Select Printed Status, Clinician, and Date Range to find what has printed in the recent past. Use the **Modify Selected Print Jobs** button to re-queue these for a second copy.

– Look up by TID to find out the status of the print job. If it has been Canceled, see who Canceled the print job or Modified the print job to send it to another printer.

– Get a list of everything that Printed for the day or a certain time period.

F. Error Messages

When creating Services and Rules, there are several instances when ShadowPrint recognizes that a setup isn't complete. For example:

– You set up a Rule but didn't select a printer to use.

– You modify a Rule by removing a User Group without selecting users for the Rule.

– You base a rule on the Patient Location, but the client doesn't maintain a patient/appointment database.

ShadowPrint will display a warning message. It doesn't stop the Rule from being created even though the Rule doesn't effectively do anything. After the message, you will need to Edit the Rule to correct the missing information to ensure print jobs will be triggered.

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error information   ✖

The rule has been saved successfully but no workflow folders, no printers were selected.

This rule will not trigger any print jobs!

Ok

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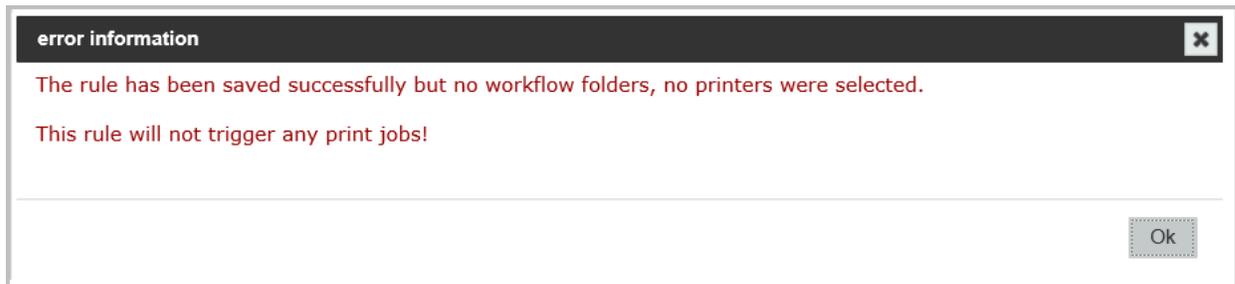
There are other problems that may arise by changes made at or discovered by the ShadowPrint Service. In these cases, ShadowPrint will send an email to the administrator defined in the Service setup.

These Service error messages include:

– A printer was removed (un-installed) from the PC or Server that is running a ShadowPrint Service and the printer is part of an active Rule.

– Someone installed ShadowPrint on a PC and tried using the Service ID and password for a Service that is running on another PC.

   o See Moving ShadowPrint in Advanced Configurations to learn how to move a ShadowPrint Service to a new PC.

– There is an error on a printer being used by ShadowPrint Service.

   o This error could be a simple as a drawer being left open.

   o The error message is dependent on the capability of the printer to send an error message to the PC it is defined on.

– A printer that is defined by a ShadowPrint Service has become unavailable.

   o This may be because it has been turned off or is currently offline.

– A print job failed due to a printer problem.

   o The error message in the email is based on the printer's capability to define the error to the workstation's Operating System.

Advanced Configurations

A. Moving ShadowPrint

When the ShadowPrint Service was created, there were 4 required fields:

– Service Name

– Login ID

– Password

– Notification Email

The ShadowPrint application was then downloaded and installed on the PC or Server. As part of the configuration, the ID and password were entered. The ShadowPrint Service then logged into the eScription One servers using the Login ID, password, and client code.

Add New ShadowPrint Service	
Service ID	0
Service Name	Dr. Smith's Office *
Service Description	Printer Near Front Desk
Service Active	☑
Login	SP1 * Password •••••••• *
Notification E-Mail	PattT@SPrt.com *

As part of the initial login, the Service sent the workstation's name to the servers. (The workstation name is defined in the workstation's operating system.) On subsequent logins, the workstation name is used as part of the login verification to ensure that the Service is running on the proper workstation and to keep print jobs from printing on the wrong printers.

If you need to move the ShadowPrint Service to a new workstation (for example, you are replacing the PC), then enter the ShadowPrint Services setup, Edit the Service to be moved, and click the **Clear** button in the Local Workstation Name field. This will remove the workstation name from the Service setup. You can now install ShadowPrint Services on a new workstation and login to the service.

Note: Please uninstall the ShadowPrint Service from the old workstation to prevent it from trying to connect to the eScription One servers and attempt to download print jobs.

B. Starting and Stopping ShadowPrint Service

If you need to Stop or Start the ShadowPrint Service that is running on the workstation:

– Click on the workstations' Start button.

– Type and select ShadowPrint to open the service console.

The console includes a **Start** and **Stop** button.
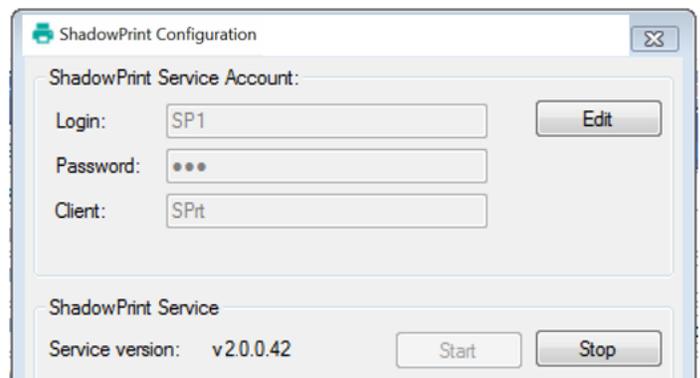
C. Add or Remove Printers

You can add or remove printers to the workstation with ShadowPrint Services still running.

Install the printer according to the printer instructions.

– Click on the workstations Start button.

– Type and select ShadowPrint to open the service console.

– Click on the Refresh button in the Printer Selection section to get a new list of all printers configured on the workstation. Printers previously defined on ShadowPrint will be already checked.

– Check the printer you just added.

– Click the OK button.

The ShadowPrint Service will send the updated list of printers to the eScription One servers.
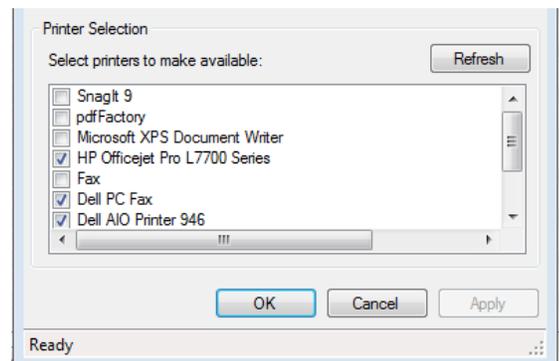
Go into Client Maintenance > Advanced Maintenance > ShadowPrint Services. (This step is only required if you want to limit when ShadowPrint can use the printer by day of the week or by time of day.

– Select the Service from the **ShadowPrint Services** box.

– Select the newly installed Printer from the **Printers Configured** box.

– Click the **Edit Printer Setup**.

– Click Save.

The printer is now available to be used in configured Rules.

D. Using Multiple Paper Trays

ShadowPrint has not been designed to use paper from different print trays. However, you can achieve the same effect by using some options at the printer setup on the workstation.

For example, in the Pediatric clinic, we want to print:

– Follow-Up Visit and Initial Visit notes from tray 2, as it is the larger tray loaded with plain paper.

– Letters - page one from tray 1, as it has letterhead on it.

– By installing the same printer on your PC multiple times, one for each tray, you can assign the appropriate printer to the ShadowPrint rules for tray 2 to print visit notes and instance two for tray 1 for letters. Your desktop support team may need to assist with installing the multiple instances of the same printer.

Implementation

ShadowPrint is a very powerful tool with many options. Proper setup requires lots of data and knowledge of the organization that will be using it.

If you need help designing the setup of ShadowPrint for a client, please call support at 1-800-858-0080 and ask to be connected with the Implementations Department.

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