



Unleash the PotentialSM

Top Transcription ASP



Tutorials

for Administrators

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Introduction

About This Document

Welcome to InfraWare!

Scope of the Document

These training tutorials will assist you with learning the functionality of the InfraWare Management Console (IMC) by walking you through the software.

This booklet is geared specifically towards administrators that will need to manage the deployment of the InfraWare platform and that later will need to manage the workflow of dictation jobs.

Want More Information?

For getting started with the software quickly, be sure to read the Administrators' Quick Start Guide, another booklet included in the Welcome Kit.

For in-depth information about the features of the InfraWare platform you will be concerned with, including security and performance information, read the white papers presented in the Administrators' Guide.

In addition, the online Knowledge Base is a fully searchable set of answers to technical questions. The Knowledge Base is accessible from any of the InfraWare applications— the InfraWare Dictation Client (IDC), the InfraWare Transcription Client (ITC), and the InfraWare Management Console (IMC) – as well as the public website at <http://infraware.com>.

Prerequisites for the tutorials

Participants should have reviewed and be familiar with:

- InfraWare Platform Overview
- InfraWare Components and Configuration
- The Speak to Type demo company

Documents for each topic are published by InfraWare Education and available from your administrator or directly from customer service.

Tutorial Contents

Tutorials are arranged by topic and in order of natural progression of information. It is recommended to perform each lesson in order.

1. Initial Login and Overview
2. Account Setup and Facilities Management
3. Users and Roles
4. Document Types and Templates
5. Normals and Standards
6. Queue Management
7. eSign-Off
8. Software Downloads

Upon completion, please see the tutorials for other platform components.

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Tutorials

IMC Tutorial 1: Initial IMC Login and Overview

Before you begin

This introduction to the InfraWare Management Console (IMC) uses the Speak to Type demo company for sample data. Please obtain a current password from your administrative contact to login with the usernames specified in hands-on steps. Internet Explorer versions 6 and above are recommended. Other browsers may work with limited functionality.

Step-by-step Tutorial for Administrators

Task

Login to the Speak to Type demo account as the administrative user.

Steps →

1. Load www.SpeakToType.com in your web browser. This simulates your organization's own website.
2. Click the Customer Login button. The InfraWare Login page loads.
3. Enter
John.Smith@SpeakToTypeXX.com for Email address. Enter the password you obtained prior to starting the lesson. Replace the "XX" with the number assigned to you.
4. You must read and acknowledge the Subscription and License Agreement before you can continue.

Notice ➤

Notice that the first page that loads has welcome content on the top and frequent task options at the bottom. The upper portion lists your assigned roles. The task shortcuts on the bottom portion of the screen are step-by-step wizards to make common tasks easy. Also notice that the Speak to Type company logo is in the upper left corner of the screen. Any InfraWare account can substitute their own logo for the InfraWare default logo as has been done here.

IMC Tutorial 1: Initial IMC Login and Overview (continued)

Step-by-step Tutorial for Administrators (continued)

☑ Task

5. Take a moment to browse the tabs by clicking one at a time to see what is available.

Steps →

6. Click the Administration tab. Observe the page and sub-tabs available.
7. Click each tab until you have seen them all.

Notice ➤

8. Some tabs have brief descriptions near the top of the page to provide a quick overview of the concepts. Don't worry about understanding everything. This is just a glance. Remaining tutorials will expose the fundamental features you need to know.

Steps →

9. Now, return to the Administration tab and click Users.

Notice ➤

In the lower right of your web browser window, notice the yellow lock. This is your indication that the communication between your computer and the InfraWare platform servers is secure and encrypted.



Conclusion

Now you know how to login to the web-based InfraWare Management Console (IMC) where configuration changes and routine management tasks are performed. Subsequent tutorials will demonstrate how to use the IMC.

IMC Tutorial 2: Account Setup and Facilities Management

Before you begin

From the last tutorial, you should be logged in to the demo Speak to Type company as the administrator, John.Smith@SpeakToTypeXX.com. If you are not already logged-in, do so before you begin.

Step-by-step Tutorial for Administrators

Task

Explore the Facilities tab.

Steps →

1. Click the Administration tab, then the Facilities tab.
2. Observe the contents of the screen.
3. Click Edit to the far right of the Account name.
4. Change the name of the Contact Person to Jane Smith.
5. Click Save Changes.

Notice ➤

On the main page of the Facilities tab, notice the list can be sorted by the column headings.

Task

Create a new Facility

Steps →

1. Click the New button near the bottom of the list of Facilities.
2. Fill in the text boxes under New Facility as follows:

Organization Name: Community
Clinic

Address: 123 Main Street

New York, New York, 45455
888-555-3333

Contact: Bert Jones

IMC Tutorial 2: Account Setup and Facilities Management (continued)

Step-by-step Tutorial for Administrators (continued)

Steps →

3. Click the Save button.
 4. Back on the main Facilities page, click a Facility name to edit the new Facility.
 5. Rename it to Community Clinics, LLC
 6. Click the Save button.
-

IMC Tutorial 3: Users and Roles

Before you begin

From the last tutorial, you should be logged in to the demo Speak to Type company as the administrator, John.Smith@SpeakToTypeXX.com. If you are not already logged-in, do so before you begin.

Step-by-step Tutorial for Administrators

Task

Add a new user: Anita Jones, anita.jones@SpeakToTypeXX.com, password: example

Steps →

1. Click the Administration tab.
2. Click the Users link under the Administration tab.
3. Click the New User button near bottom.
4. Type the new User's email address, Anita.Jones@SpeakToTypeXX.com, first name, last name and credentials in the spaces provided.
5. Type "**example**" as the password in the top password space. Repeat the password in the lower space. Be sure to observe your organization's minimum password length requirements. Note that the new User can change their password when they first login or at any time.
6. Click the check box for Transcriptionist under the Roles with Account heading.
7. Click the Create User button.

Notice ➤

Note that these Roles apply to the entire Speak to Type Account. Roles limited to a particular Facility would be assigned later.

IMC Tutorial 3: Users and Roles (continued)

Step-by-step Tutorial for Administrators (continued)

- ☑ Task** Explore the Users tab.
- Steps →** 1. Click the Administration tab, then the Users tab.
- Notice ➤** Do you see Anita Jones listed? Notice there might be more than one Facility in the Facilities drop-box. If so, be sure to view All Facilities. The view of Users can be filtered by their associated Facility on this screen.
- ☑ Task** View and Modify User settings.
- Steps →** 2. Click Anita Jones and to edit her information.
- Notice ➤** Notice there are three sections to the Edit User page. The user's name and email can come first. The other two sections are for Roles. Notice the difference between assigning a Role that applies to the entire Account (which would also apply to all Facilities under the Account) and to assigning to one or more specific Facilities.
- Steps →** 3. Click the check box next to the Manager Role under Account Roles.
- Notice ➤** Try adding a Role for Community Hospital, then another Role for Valley Clinic. Notice the different display after adding the second Facility.
-

IMC Tutorial 3: Users and Roles (continued)

Step-by-step Tutorial for Administrators (continued)

- ☑ Task** Explore the Roles tab.
- Steps →**
4. Click the Roles tab.
 5. Review the two sections of the screen. Again, they are separated between Roles for Accounts and Roles for Facilities.
 6. Click Manage below the heading for the *System Administrators* Role.
 7. Click on Anita Jones, then click Assign Role.
 8. Click Save.
- Notice ➤** Notice that Anita's name displays below both Transcriptionist and Manager (as you set in earlier steps). Some Roles apply to your entire Account. Others apply to specific Facilities (your customers). Below each Role heading and list of Users, there is a link to *Manage* that Role. This page represents an alternative perspective for managing Users and Roles – from the perspective of Roles.
- Steps →**
9. Click the Users tab (under the Administration tab), find Anita Jones, and click her name.
 10. Click System Administrator Role.
- Notice ➤** Notice that Anita Jones now has the Role of Transcriptionist, Manager and System Administrator.
- Conclusion** Now you know how to create and edit Users on the InfraWare platform as well as how to assign Roles which provide specific permissions to Users.
-

IMC Tutorial 4: Payroll Models

Before you begin

From the last tutorial, you should be logged in to the demo Speak to Type company as the administrator, John.Smith@SpeakToTypeXX.com. If you are not already logged-in, do so before you begin.

Step-by-step Tutorial for Administrators

Task

Create a simple payroll model to specify how transcriptionists will be paid.

Steps →

1. Select the Administration tab
 2. Now select the Payroll Models tab.
 3. The Payroll Models table contains a list of payroll models currently defined for your company with each of their rates displayed. Click “New payroll model” below the Payroll Models table to create a new payroll model.
 4. The Payroll Model Settings page lets you define a payroll model. For instance, a payroll model can pay MTs ten cents per each 1000 line breaks, or ten dollars per each 5 characters. In this example, we will pay \$0.75 for each 10 non-whitespace characters.
 5. In the space labeled “Description”, type the name of the new payroll model. In this example, type “My payroll model”.
 6. In the space labeled “Pay this rate”, type how much you would like to pay for each set of units. In this example, type “\$0.75”.
 7. For the STAT rate, enter how much you would pay for a high-priority job. Enter \$1.
 8. In the space labeled “Per this many units”, type how many units should be in each set. In this example, type “10”.
-

IMC Tutorial 4: Payroll Models (continued)

Step-by-step Tutorial for Administrators (continued)

- Steps →**
9. Using the drop-down box labeled “Using this unit”, choose which unit should be used for the payroll model. In this example, choose “non-whitespace character”.
 10. Click the “Create New” button to create the payroll model.

Task Edit a Payroll Model that has been created.

- Steps →**
1. Next to *My payroll model*, click Edit.
 2. Type “5” in the space “Per this many units”.
 3. Click Save.

Task Delete a Payroll Model.

- Steps →**
1. Click *Edit* next to the Payroll Model you just created and edited.
 2. Click the Delete button.
 3. A screen will pop up asking if you are sure you wish to delete this selection. Click OK if you wish to delete. Click Cancel if you do not want to delete the selected Payroll Model.

Notice ➤ Once you click OK, the selected Payroll Model will be permanently deleted.

Conclusion Now you know how to create and edit Payroll Models in the InfraWare platform to specify how transcriptionists and reviewers will be paid.

IMC Tutorial 5: Billing Models

Before you begin

From the last tutorial, you should be logged in to the demo Speak to Type company as the administrator, John.Smith@SpeakToTypeXX.com. If you are not already logged-in, do so before you begin.

Step-by-step Tutorial for Administrators

Task

Create a simple billing model to determine how clients will be billed.

Steps →

11. Select the Administration tab
 12. Now select the Billing Models tab.
 13. The Billing Models table contains a list of billing models currently defined for your company with each of their rates displayed. Click “New billing model” below the Billing Models table to create a new billing model.
 14. The Billing Model Settings page lets you define a billing model. For instance, a billing model can charge ten cents per each 1000 line breaks, or ten dollars per each 5 characters. In this example, we will charge one dollar for each 10 non-whitespace characters.
 15. In the space labeled “Description”, type the name of the new billing model. In this example, type “My billing model”.
 16. In the space labeled “Charge this rate”, type how much you would like to charge for each set of units. In this example, type “\$1”.
 17. For the STAT rate, enter how much you would charge for a high-priority job. Enter \$1.75.
 18. In the space labeled “Per this many units”, type how many units should be in each set. In this example, type “10”.
-

IMC Tutorial 5: Billing Models (continued)

Step-by-step Tutorial for Administrators (continued)

- Steps →**
19. Using the drop-down box labeled “Using this unit”, choose which unit should be used for the billing model. In this example, choose “non-whitespace character”.
 20. Click the “Create New” button to create the billing model.

Task Edit a Billing Model that has been created.

- Steps →**
4. Next to *My billing model*, click Edit.
 5. Type “2” in the space “Per this many units”.
 6. Click Save.

Task Delete a Billing Model.

- Steps →**
4. Click *Edit* next to the Billing Model you just created and edited.
 5. Click the Delete button.
 6. A screen will pop up asking if you are sure you wish to delete this selection. Click OK if you wish to delete. Click Cancel if you do not want to delete the selected Billing Model.

Notice ➤ Once you click OK, the selected Billing Model will be permanently deleted.

Conclusion Now you know how to create and edit Billing Models in the InfraWare platform to specify how clients will be billed.

IMC Tutorial 6: Security

Before you begin

From the last tutorial, you should be logged in to the demo Speak to Type company as the administrator, John.Smith@SpeakToTypeXX.com. If you are not already logged-in, do so before you begin.

Step-by-step Tutorial for Administrators

- Task** Set password requirements for increased security in one facility.
- Steps** →
1. Select the Administration tab.
 2. Now click the Security tab.
 3. Click the Facility radio button and then select Facility which the password requirements will affect. Select Community Hospital.
 4. Set the minimum password length to 6. This means that passwords must be 6 characters long.
 5. Click “Save Settings” to put the change into effect.
- Notice** ➤ Notice the checkboxes below the minimum password length space. For increased security, you can check one or more of these boxes to ensure that your users’ passwords are harder to guess. “p4Ssw0%d” is harder to guess than “password”, for instance.
-

IMC Tutorial 7: Tab Visibility

Before you begin

From the last tutorial, you should be logged in to the demo Speak to Type company as the administrator, John.Smith@SpeakToTypeXX.com. If you are not already logged-in, do so before you begin.

Step-by-step Tutorial for Administrators

- | | |
|-----------------|--|
| ☑ Task | Make a tab invisible to facility administrators. |
| Steps → | <ol style="list-style-type: none"> 6. Select the Administration tab. 7. Now select the Tab Visibility tab. 8. Click the <i>IMC Tab Settings</i> link to expand the list of tabs available in the IMC. |
| Notice ➤ | Note that each major tab has a list of its subtabs underneath it. |
| Steps → | <ol style="list-style-type: none"> 9. Select the facility Community HospitalXX, if it is not already selected. 10. Below the <i>Administration</i> heading, click the <i>Edit</i> link to the left of the tab described as “Payroll Models”. 11. Uncheck the checkbox in the Payroll Models row under <i>Facility Administrator</i>. 12. Click the <i>Update</i> link. |
| Notice ➤ | Note that facility administrators that log into the IMC will no longer see the Payroll Models tab under the Administration tab. |
-

IMC Tutorial 8: Tab Visibility (continued)

Step-by-step Tutorial for Administrators (continued)

- ☑ Task** Permit Authors to see the Global Documents tab.
- Steps →**
7. Under the Document Config heading (still in on the Tab Visibility tab), click *Edit* next to *Manage Global Documents*.
 8. Click the checkbox under Authors.
 9. Click *Update*.
- Notice ➤** Authors will now be able to see the Global Documents tab under Document Config when they log into the IMC.
- ☑ Task** Disable a tab in the EHR Web Portal for Facility Executives.
- Steps →**
7. If the IMC tab settings are still open, click the *IMC Tab Settings* link to collapse them.
 8. Click *EHR Web Portal Tab Settings* to expand the available tabs in the WebEHR.
 9. Under the *Top tabs* heading, find the Software tab.
 10. Click *Edit* to the left of the word Software.
 11. Uncheck the checkbox under *Facility Executive*.
 12. Click *Update*.
- Notice ➤** Once you click *Update*, Facility Executives that log into the EHR Web Portal will not be able to see the Software tab.
- Conclusion** Now you know how to select which tabs are visible to Authors, Facility Administrators, and Facility Executives in the IMC and EHR Web Portal.
-

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IMC Tutorial 8A: Managing Document Types

Before you begin

From the last tutorial, you should be logged in to the demo Speak to Type company as the administrator, John.Smith@SpeakToTypeXX.com. If you are not already logged-in, do so before you begin.

Step-by-step Tutorial for Administrators

- ☑ Task** Create a new Document Type
- Steps →**
1. Click the Document Config tab.
 2. Click the Document Types tab.
- Notice ➤** Notice that Document Types are unique for each Facility under your Account and within each Facility they are organized in Categories. You can have as many Categories and Types as needed. The purpose of Categories is to keep Document Types better organized.
- Steps →**
3. Select the Facility as Community HospitalXX.
 4. Under the top Category, click New Type.
 5. Notice you can type a description and enter other settings on the New Document Type page.
 6. Type “Discharge Summary” for Description.
 7. Leave the TDS ID alone. (This would be used by the author to identify the Document Type using telephone dictation.)
-

IMC Tutorial 8A: Managing Document Types (continued)

Step-by-step Tutorial for Administrators (continued)

Steps →

8. Select the Medical dictionary from the drop box.
9. Observe the list in the Focus section. To add a focus, click the checkbox next to the name. You do not need to add a Focus for this Report.
10. Click Save.

Notice ➤

Notice the new Discharge Summary Document Type under the Category.

Conclusion

Now you know how to create and manage Document Types in the InfraWare platform, including organization by Categories and specifying Dictionary and Focus for effective speech recognition.

IMC Tutorial 8B: Create and Upload Templates

Before you begin

This introduction to the InfraWare Management Console (IMC) uses the Speak to Type demo company for sample data. Please obtain a current password from your administrative contact to login with the usernames specified in hands-on steps. Internet Explorer versions 6 and above (7 preferred) are recommended.

This tutorial also assumes that you have already installed the InfraWare Template Editor (ITE). If not, Click the Software tab in the IMC and click to install the ITE.

Step-by-step Tutorial for Administrators

Notice ➤

There are three major steps to this process:

- a. Create a Template
- b. Upload the Template
- c. Assign the template to a Document Type

Task

Start the InfraWare Template Editor by clicking Start/Programs/InfraWare and selecting the InfraWare Template Editor.

Steps ➔

10. Populate the static text in the template as desired by either:
 - a. Typing directly into the page, or
 - b. Pasting content from another word processor, or
 - c. Choosing File/Import Template from the menu.
 11. Place the field identifiers in the template at their appropriate places by selecting Insert from the menu. Options include both ADT and job specific fields.
 12. Complete the content as desired.
-

IMC Tutorial 8B: Create and Upload Templates (continued)

Step-by-step Tutorial for Administrators (continued)

Task

Upload the new Template to the platform.

Steps →

13. Once the content and formatting of the template are complete, click File/Save to InfraWare Platform from the menu.
14. Provide your login credentials when prompted. Then name the template:

15. Select the appropriate facility to which the template belongs.
16. Type a descriptive name for the new template.
17. Click Save to Platform.

Notice ➤

When you login to the IMC, your template is now displayed in the list under Document Config/Templates.

Task

Assign the uploaded template to a Document Type.

Steps →

18. Click the Document Types sub-tab under Document Config.
19. Click the New Type button.
20. Complete the fields as desired. For the Template field, select your template from the drop-list.

Conclusion Now you know how to create, upload and assign a template to a Document Type. The template will now be provided to MTs transcribing reports of that Document Type, and ADT info will be automatically populated.

IMC Tutorial 9: Normals and Standards

Before you begin

From the last tutorial, you should be logged in to the demo Speak to Type company as the administrator, John.Smith@SpeakToTypeXX.com. If you are not already logged-in, do so before you begin.

Step-by-step Tutorial for Administrators and Transcriptionists

Task

Create Normals for a User for fast text substitution.

Steps →

1. Select the Document Config tab
2. Now select the Normals tab.
3. Choose what the new Normal will affect. Choose *Author* if the Normal will only be used for a specific Author. Choose *Facility* if the Normal will be used for an entire Facility or choose *Account* if the Normal will be used for all Facilities that fall under your Account. Leave Author selected.
4. Select Community HospitalXX.
5. Click the New button to the left of the screen.

Steps →

6. In the space provided under the *Normals Name:* heading, type what the user will say when they are dictating. In this example, type “My normal chest exam”.
 7. In the area below the editor toolbar, type the normal text that is to be replaced when the User dictates “My normal chest exam”. For our example, type *“Respiratory effort easy. Percussion normal. Auscultation of lung sounds are normal. He has no costovertebral angle tenderness.”*
-

IMC Tutorial 9: Normals and Standards (continued)

Step-by-step Tutorial for Administrators and Transcriptionists (continued)

8. Click Create Normal.
- Notice** ➤ You may Add New, Delete or Edit Normals from this page.
- Task** Edit a Normal that has been created
- Steps** ➔
9. Select to Edit Normals for the specific author: Artois, Charles.
 10. Next to *My normal example*, Click Edit
 11. In the edit window, make a change to the text displayed.
 12. Click Save Changes
- Task** Delete a Normal
- Steps** ➔
13. Click *Delete* next to the Normal you just created earlier.
 14. Click Delete
 15. A screen will pop up asking if you are sure you wish to delete this selection. Click OK if you wish to delete. Click Cancel if you do not want to delete the selected Normal.
- Notice** ➤ Once you click OK, the selected Normal will be permanently deleted.
- Conclusion** Now you know how to create and edit Normals in the InfraWare platform for quick and easy substitution in either the First Draft recognition service or by an MT using the InfraWare Transcription Client (ITC).
-

IMC Tutorial 10: Document Specifications

Before you begin

From the last tutorial, you should be logged in to the demo Speak to Type company as the administrator, John.Smith@SpeakToTypeXX.com. If you are not already logged-in, do so before you begin.

Step-by-step Tutorial for Administrators

Task

Create Specification for a Document Type to ensure that the final document has appropriate margins for binding.

Steps →

1. Select the Document Config tab
 2. Now select the Specifications tab.
 3. Select *A Document Type*.
 4. Select Community Hospital XX.
 5. Select General Category as the Document Category, and General Document Type as the Document Type.
 6. Click the New button under the list of Specifications.
 7. In the space provided under the *Name:* heading, type a short name to identify this Specification. Type "*Binding margins*".
 8. In the area below the *Text:* heading, type the details of the Specification. For example, type, "*The left margin should be 2 inches. The right, top, and bottom margins should be 1 in.*"
 9. Click the checkbox that reads *Display instructions to transcriptionists while editing*. When MTs see the document in the InfraWare Transcription Client (ITC), they will also see the details of this Specification.
-

IMC Tutorial 10: Document Specifications (continued)

Step-by-step Tutorial for Administrators (continued)

- Steps** → 10. Under the *Check Question:* heading, enter a question to remind MTs to verify that they have met the Specification. For instance, type, “*Did you verify that the margins are set for binding?*”
11. Check the checkbox *Display check question prior to submission.*
12. Click Create Specification.
- Notice** ➤ You may Add New, Delete or Edit Specifications from this page.
- Task** Edit a Specification that has been created
- Steps** → 13. Next to *Binding Margins*, click Edit.
14. Change “2 inches” to “2 in.”
15. Click Submit Changes.
- Task** Delete a Specification.
- Steps** → 13. Click *Delete* next to the Specification you just created and edited.
14. A screen will pop up asking if you are sure you wish to delete this selection. Click OK if you wish to delete. Click Cancel if you do not want to delete the selected Specification.
- Notice** ➤ Once you click OK, the selected Specification will be permanently deleted.
- Conclusion** Now you know how to create and edit Specifications in the InfraWare platform to ensure that finished documents meet your standards.
-

IMC Tutorial 11: Global Documents

Before you begin

From the last tutorial, you should be logged in to the demo Speak to Type company as the administrator, John.Smith@SpeakToTypeXX.com. If you are not already logged-in, do so before you begin.

Step-by-step Tutorial for Administrators

- ☑ Task** Upload a Global Document for MTs to see in the ITC.
- Steps →**
1. Select the Document Config tab
 2. Now select the Global Documents tab.
- Steps →**
3. Click the New Global Document button.
 4. In the space provided after the heading *Description*, type “Appointment Schedule”.
 5. Click Browse to find a file to upload. You can upload a Word document, an Excel file, or any type of file you prefer.
 6. Add the file for the Community Hospital XX facility.
 7. Click Create New Global Document.
- Notice ➤** You may Add New, Delete or Rename Global Documents from this page.
- ☑ Task** Rename a Global Document that has been created.
- Steps →**
16. Next to the document you just added, click Edit.
 17. Type “for today” after the words “Appointment Schedule”.
 18. Click Save Current Global Document.
-

IMC Tutorial 11: Global Documents (continued)

Step-by-step Tutorial for Administrators (continued)

Task

Delete a Global Document.

Steps →

8. Click *Delete* next to the Global Document you just created and edited.
9. Click Delete
10. A screen will pop up asking if you are sure you wish to delete this selection. Click OK if you wish to delete. Click Cancel if you do not want to delete the selected Global Document.

Notice ➤

There is also an expiration date feature for global documents. This provides an auto-cleanup service. Daily encounter lists, for example, may not be needed after a week. Using this feature prevents an administrator from needing to delete such files.

Conclusion

Now you know how to create, rename and delete Global Documents in the InfraWare platform for easy viewing by an MT or reviewer in the InfraWare Transcription Client (ITC).

IMC Tutorial 12: Queue Management

Before you begin

From the last tutorial, you should be logged in to the demo Speak to Type company as the administrator, John.Smith@SpeakToTypeXX.com. If you are not already logged-in, do so before you begin.

Step-by-step Tutorial for Administrators

Task View the Queue in various dimensions.

Task Take a moment to explore the Queue Management features.

Steps →

1. Select the Queue tab. The Administrator Queue page should be showing.
2. Under the *Facility* heading, select the facility that you wish to view.
3. Click on the downward arrows to expand the Search Panel.

Search Panel

Notice ➤ The Queue can be set to show all documents submitted for the entire Account, or it can be filtered to reflect a specific Facility. It can also be filtered by job status.

Tasks Administration Document Config Queue Workflow Delivery Reports Software Help

Admin Queue Transcriptionist Queue Author Queue QA Queue eSign-Off Queue Queue Stats Saved Search

Administrator Queue

Oldest dictation ID: 4522
Time in Queue: 48 days, 0 hours, 58 min
Queue Length: 7 hours, 24 min, 55 sec

This page allows you to view jobs in the queue and modify their settings as needed.

Account: Speak To Type 64 Facility: Community Hospital 64

Search Panel

Quick Search

Dictation ID Must Have Search

or

Load Saved Search

[DEFAULT]

Actions:

Job Properties Return Job(s) To Server Order Urgent Jobs Delete Job(s) Print Report(s) View Report Download Report(s)

51 records found - Page 1 of 3 Refresh queue

ID	Downloads	Status	Delivered	Transcribed	Subject	Document Type	Author By
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IMC Tutorial 12: Queue Management (continued)

Step-by-step Tutorial for Administrators (continued)

Notice ➤ Notice that the Search Panel includes two options for Searching: Quick Search and Saved Searches. Quick Search allows you searching by one criteria at a time. Saved Searches can be created with more complex criteria and used frequently by selecting from the drop-down list on the Search Panel.

- Steps ➔**
4. Identify a job number for a dictation in the left-most column. In the Quick Search area, type that number into box to the right of Dictation ID. Click Search and notice the Queue is not filtered to that job.
 5. Now click to expand the drop-down list for Saved. All new users have a [DEFAULT] and [RETURN ALL] option. Select <New Saved Search> to go to the Saved Searches screen.

Task Sort the Queue

- Steps ➔**
6. Return to the Queue and click the Subject heading. Click it again, and again.

Notice ➤ Notice that the Queue is sorted by a particular column when the heading it clicked. When the same heading is clicked a second time, it re-sorts the Queue by that column in reverse order (ascending/descending).

- Steps ➔**
7. Click another heading. Observe the changes.
-

IMC Tutorial 12: Queue Management (continued)

Step-by-step Tutorial for Administrators (continued)

Task Assign jobs to an MT

8. Click the check box on the left most column of the top two jobs.
9. Click the Job Properties link in the Actions area.
10. On the Job Properties page, click Edit Transcriptionist Assignment in the Assignment area.
11. Click on Transcriptionist and Select Janie Morley from the drop-down box.
12. Click the Save Changes button.

Notice ➤ Notice the new information listed in the Queue for that job. Also note that you can perform that same operation for multiple jobs for which you need to make the same assignments by clicking the check boxes for each job prior to clicking the Assign button. Note: You might need to Refresh to see updated information.

ID	Downloads	Status	Delivered	Transcribed	Subject	By
<input type="checkbox"/> 5864		Ready for download			NJM Training beginning at 116	

Conclusion You should now be able to locate a submitted dictation, discover the status of that job and assign it is needed.

IMC Tutorial 13: Queue Stats

Before you begin

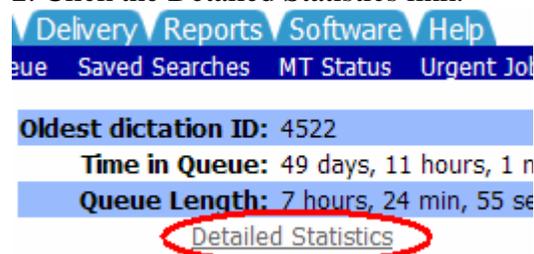
From the last tutorial, you should be logged in to the demo Speak to Type company as the administrator, John.Smith@SpeakToTypeXX.com. If you are not already logged-in, do so before you begin.

Step-by-step Tutorial for Administrators

Task Explore the Queue Statistics.

Steps →

1. Select the Queue tab.
2. Click the Detailed Statistics link.



3. Under the *Facility* heading, select the facility that you wish to view. In this case, choose Community Hospital XX.

Notice ➤

Note the statistics shown—you can see the total duration of the dictations left to be transcribed, in transcription, in quality assurance, and in eSign-Off.

Note that below the Overview, there are statistics separated by the Document Types that have been defined for the facility.

IMC Tutorial 14A: eSign-Off for Administrators

Before you begin

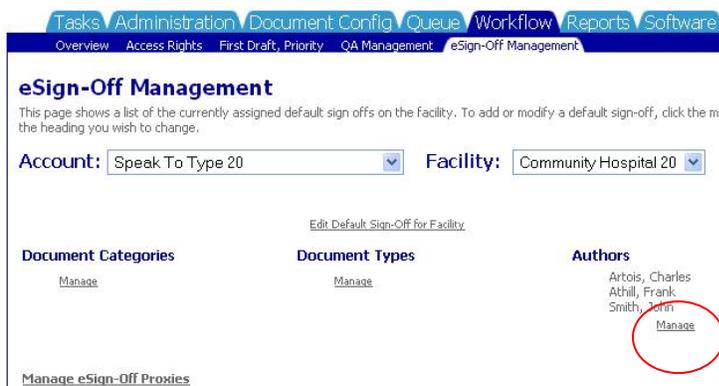
From the last tutorial, you should be logged in to the demo Speak to Type company as the administrator, John.Smith@SpeakToTypeXX.com. If you are not already logged-in, do so before you begin.

Step-by-step Tutorial for Administrators

Task Allow eSign-Off to Author, John Smith.

Steps →

1. Click the Workflow tab and then the eSign-Off Management tab.
2. Select Community HospitalXX.
3. Under Authors, Click Manage



IMC Tutorial 14A: eSign-Off for Administrators (continued)

Step-by-step Tutorial for Administrators

Steps →

- Under New eSign-Off Requirement, select the Author you wish to assign eSign-Off to.

Tasks Administration Document Config Queue Workflow Rep

Overview Access Rights First Draft, Priority QA Management eSign-Off Management

Manage eSign-Off for Authors

The following is a list of the current default sign offs. To modify an existing sign off, click the edit button, drop down list below.

Description	
Artois, Charles	Edit
Athill, Frank	Edit
Smith, John	Edit

New eSign-Off

Author: Arundel, Elizabeth ▼

Steps →

- Click Add, as in the picture above.

eSign-Off Requirement for Author

Jobs from this author require the eSign-Off workflow if any requirements are set to yes. On this page you can author specific requirement setting.

Facility	InfraWare	Requires eSign-Off?	Authorized to eSign-Off
Author	Atest, Atest	No	Job Author Change

- Click Add Requirement, as in the picture above.
- Select the Job Author radio button. (Alternatively, you could select a User or Pool responsible for signing the Author's documents.)

Please select the authorized user or pool of users:

Job Author Facility User: eSign-Off Pool:

Select the Facility User Radio button and select a user responsible for signing the Author's documents.

IMC Tutorial 14A: eSign-Off for Administrators (continued)

- Steps** ➔
8. (Alternatively, you could select the Job Author or an eSign-off Pool.)
 9. Click Save.

Notice ➤ Now all documents by this Author can be signed by the selected User or Pool.

IMC Tutorial 14B: eSign-Off for Authors

Before you begin

Log into the InfraWare Management Console (IMC) with the Author credentials:
Charles.Artois@CommunityHospitalXX.com and
Password: use password provided.

Step-by-step Tutorial

☑ Task

Use eSign-Off to approve a document.

Steps →

1. Click the Queue tab
2. Click on the eSign-Off Queue tab.
3. Click on the first RTF (Rich Text Format) document.



4. If prompted to Open or Save, choose Open.
5. Review the document for accuracy. Determine whether to Accept or Return for Corrections.
6. Close the editor document and return to the IMC.
7. Click the eSign-Off icon.



8. Click the button to Sign-Off or Return for Corrections.



Notice ➤

Optionally an updated document can be uploaded by clicking Upload a Correction.

IMC Tutorial 15: Transcriptionist Settings

Before you begin

From the last tutorial, you should be logged in to the demo Speak to Type company as the administrator, John.Smith@SpeakToTypeXX.com. If you are not already logged-in, do so before you begin.

Step-by-step Tutorial for Administrators

- ☑ Task** Increase a transcriptionist's maximum number of checked-out dictations.
- Steps →**
1. Select the Administration tab.
 2. Now select the Users tab.
 3. Click the small pencil in the MT column next to the user John Smith.
- Notice ➤** Notice the types of setting available in this area. You may set quotas, place the MT in user pools, and modify her access rights.
4. Next to Maximum number of checked-out dictations, enter a number larger than 1, like 10.
 5. Click Save.
 6. Click << Return.
- Notice ➤** An MT specifies how many dictations they would like to download in the InfraWare Transcription Client (ITC). The maximum number of checked-out dictations is always obeyed, however, even if an MT sets the ITC to download more than that.
- Conclusion** Now you can modify the number of dictations a particular MT may have checked out at any one time.
-

IMC Tutorial 15: Transcriptionist Settings (continued)

Step-by-step Tutorial for Administrators (continued)

☑ Task

Enter a daily line quota for an MT.

Steps →

19. Click the small pencil in the *MT* column next to the user John Smith.
20. Type “900” as the *Daily line quota*.
21. Click *Save*.
22. Click << *Return*.

Conclusion

Now you know how to set a daily line quota for a particular MT using the InfraWare Management Console (IMC).

IMC Tutorial 16: MT Access Rights

Before you begin

From the last tutorial, you should be logged in to the demo Speak to Type company as the administrator, John.Smith@SpeakToTypeXX.com. If you are not already logged-in, do so before you begin.

Step-by-step Tutorial for Administrators

- | | |
|-----------------|---|
| ☑ Task | Limit a transcriptionist's access to a certain document type. |
| Steps → | <ol style="list-style-type: none"> 4. Select the Workflow tab. The Workflow Overview should be showing. 5. Click on the MT Access Rights area of the picture or the sub-tab labeled MT Access Rights. |
| Notice ➤ | The Transcriptionists table lists each transcriptionist in the account and the number of authors and Document Types the MT has access to when getting new dictations. |
| Steps → | <ol style="list-style-type: none"> 6. Click on the Edit link to the right of the MT named John Smith. |
| Notice ➤ | Notice that the access rights are under the heading Transcriptionist Access Rights. |
| Steps → | <ol style="list-style-type: none"> 7. Uncheck the checkbox labeled Allow access to all document types in queue. The screen should now show additional options, allowing you to choose which Document Types, Document Categories, and Facilities the MT has access to. 8. Click the Choose to the right of Allow Access to Document Types. 9. From the list on the left, choose "General Document Type". 10. Click Allow Access >> to move it into the list of Allowed Document Types. |

IMC Tutorial 16: MT Access Rights (continued)

Step-by-step Tutorial for Administrators (continued)

Steps ➔

11. Click Save.

Notice ➤

The General Document Type is now listed under the Document Types John Smith is allowed to access.

Notice ➤

Note that by using the checkbox and button under Authors, you could restrict John Smith to only transcribing dictations from a particular author.

Conclusion

Now you know how to restrict an MT to transcribing a particular Document Type.

IMC Tutorial 17: Software Downloads

Before you begin

From the last tutorial, you should be logged in to the demo Speak to Type company as the administrator, John.Smith@SpeakToTypeXX.com. If you are not already logged-in, do so before you begin.

Step-by-step Tutorial for Administrators and Transcriptionists

- ☑ Task** Identify downloadable Software options.
 - Steps →**
 1. Click the Software tab.
 - Notice ➤** Notice the screen layout. Downloadable client applications include the IDC, ITC and Tray Application. Several versions on each application may be available. One version of each will be “Recommended”.
 - ☑ Task** Browse through the available software downloads
 - ☑ Task** Download the InfraWare Dictation Client
 - Steps →**
 2. Click the *by clicking here* link to begin the installation.
-

IMC Tutorial 17: Software Downloads (continued)

Step-by-step Tutorial for Administrators and Transcriptionists (continued)

Note ➤ The installer is web-based and will determine which components are needed by your system. Click Open or Run when prompted. You must use Internet Explorer as your browser.

- Steps** ➔
3. If prompted to Open or Save, choose Save.
 4. When download is complete, double-click the saved file to open.
 5. The Installation Wizard will open and guide you through the steps to install the software. You will need to follow the steps indicated and click Next when prompted.
 6. Activate the program with your license key when prompted. An internet connection is required.
 7. Once the set-up process is complete, double-click on the InfraWare Dictation Client Desktop Icon.
 8. Enter
John.Smith@SpeakToTypeXX.com
and your password provided.

Notice ➤ You are now ready to explore the InfraWare Dictation Client. These same steps may be followed to install any of the available software options.

Conclusion Now you know how to identify and download the correct InfraWare software clients for installation to your Windows computers.
