Welch Allyn®
Q-Tel® RMS

Report eSignature Tool

Installation and User Manual

Manufactured by Welch Allyn, Inc., Skaneateles Falls, NY U.S.A.

CAUTION: *Federal law restricts this device to sale by or on the order of a physician.*

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Software: v5.0.1 2019-09

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All changes will be in compliance with regulations governing manufacture of medical equipment.

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\# 901145 REHABILITATION MANAGEMENT SYSTEM

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INTRODUCTION

Purpose

The Q-Tel RMS Report eSignature Tool User Manual explains how to install, set up, and begin using the service that enables Q-Tel RMS authorized electronic report signature via access to the Q-Tel RMS Q-Exchange directory.

Audience

This manual is written and intended for clinical professionals. They are expected to have a working knowledge of medical procedures and terminology as required for monitoring cardiac patients. In addition, it is assumed that users are familiar with Microsoft Windows and have a basic understanding of computer operations.

Q-Tel RMS Report eSignature Tool Overview

This application is intended to allow authorized users to electronically sign Q-Tel RMS generated session reports, summary reports, and full disclosure reports utilizing Active Directory. Once the reports are electronically signed, a signature page with the signer's name, credentials, time, and date is appended to the PDF. The PDF report together with the associated XML results are then sent to a user-defined location.

Once the Q-Tel RMS session has been completed and results exported, they will appear in a list named *Reports to Sign* upon opening the eSignature tool. There, the first page only or the full report can be reviewed in PDF Reader. Check box selections allow the user to choose single or multiple reports for signing by selection of a Sign Report(s) button. A report export message informs the user of the export status.

The Q-Tel RMS Report eSignature Tool can be installed and run on a Q-Tel RMS workstation computer or a computer that has access to the Q-Exchange directory.

Required Equipment

- Q-Tel RMS system at software version 4.0.0 or later with the Q-Exchange option enabled
- Q-Tel RMS Report eSignature Tool Kit
    - Installation CD
    - Q-Tel RMS Report eSignature Tool user manual that includes installation and operational instructions (this document)
- Computer(s) that will run the Q-Tel RMS Report eSignature Tool application
    - Operating System: Microsoft Windows 7 Professional (32 or 64-bit) or Windows 10 Professional (32 or 64-bit)
    - CD/DVD Reader
    - Network connection to the Q-Tel RMS Q-Exchange directory and the destination signed report directory.

INSTALLATION

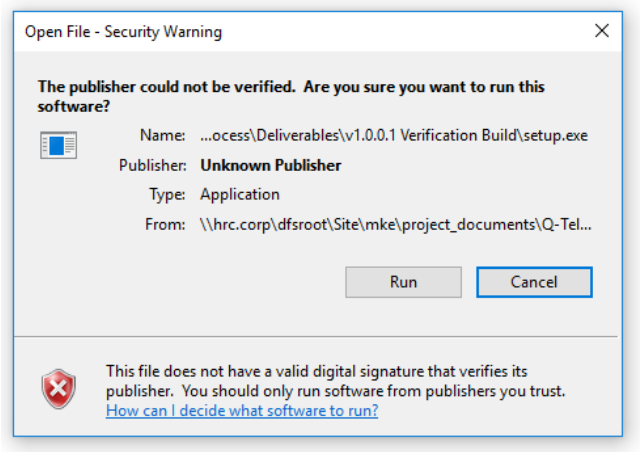
The two files needed for installation are provided by Welch Allyn.

Name	Date modified	Type	Size
QTelReportSignerInstaller.msi	3/21/2018 3:36 PM	Windows Installer ...	51,690 KB
setup.exe	3/21/2018 3:36 PM	Application	763 KB

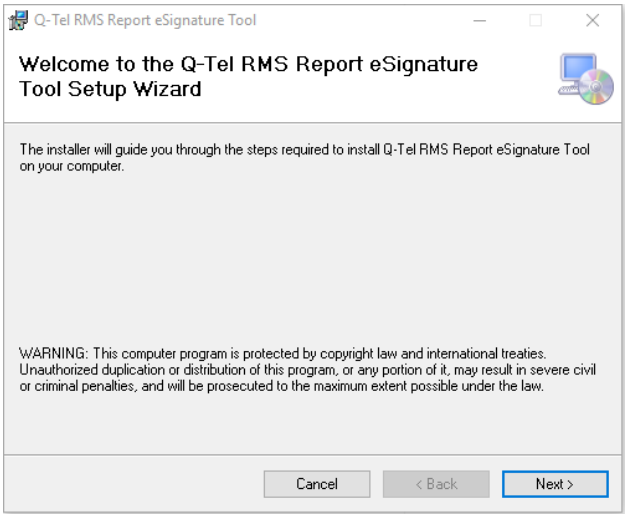
Note: The user must be a direct member of the authorized domain group and credentials must be successfully authenticated to install this application.

These files can be copied to a DVD or moved to a local directory on the computer where the installation will take place.

1. Navigate to the location containing the installation files.
2. Right click **setup.exe**, then select **Run as administrator.**
3. If prompted with a security warning window, select **Run** to continue. Otherwise proceed to the following step.

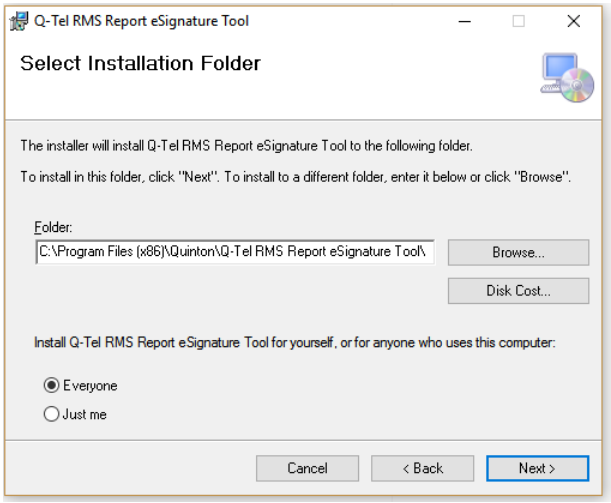


4. Click **Next** on the welcome screen to initiate the installation process.

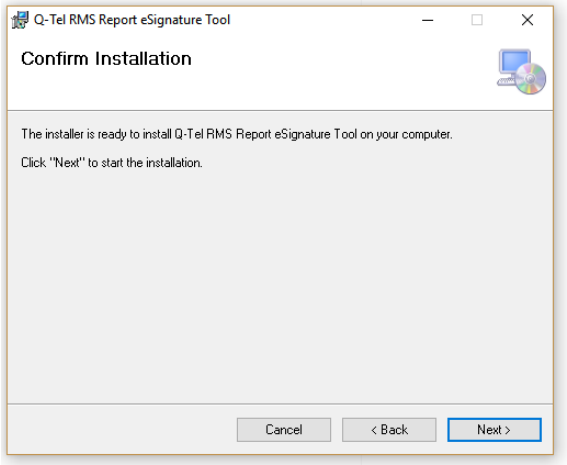


5. For the following options choose to:
   - Keep the default installation folder (recommended) or click **Browse** to enter a different path.
   - Keep the default user selection **Everyone** (recommended) or to restrict user access to one person, select **Just me**.

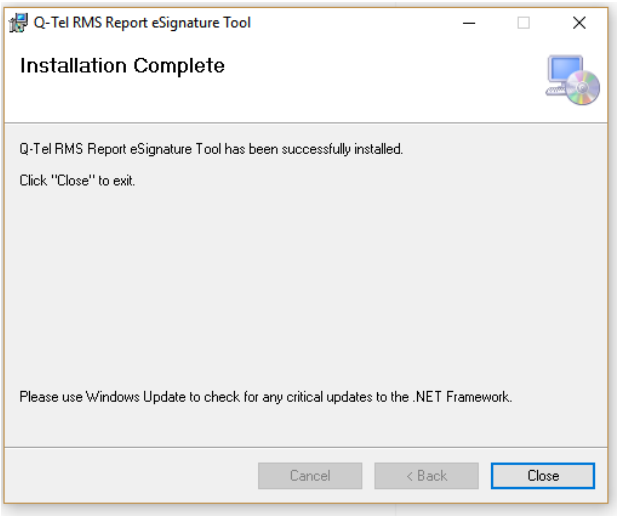
6. Click **Next**.



7. To begin the installation, click **Next**.



8. Once the installation completes, click **Close**.

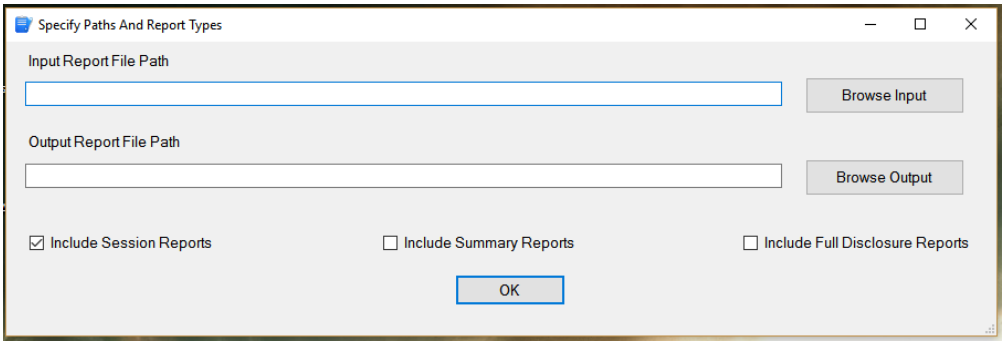


USING THE Q-TEL RMS REPORT ESIGNATURE APPLICATION

After installation, the following icon for the **Q-Tel RMS Report eSignature Tool** will be available on the desktop.

1. To run the application**,** double click the Q-Tel RMS Report eSignature icon.

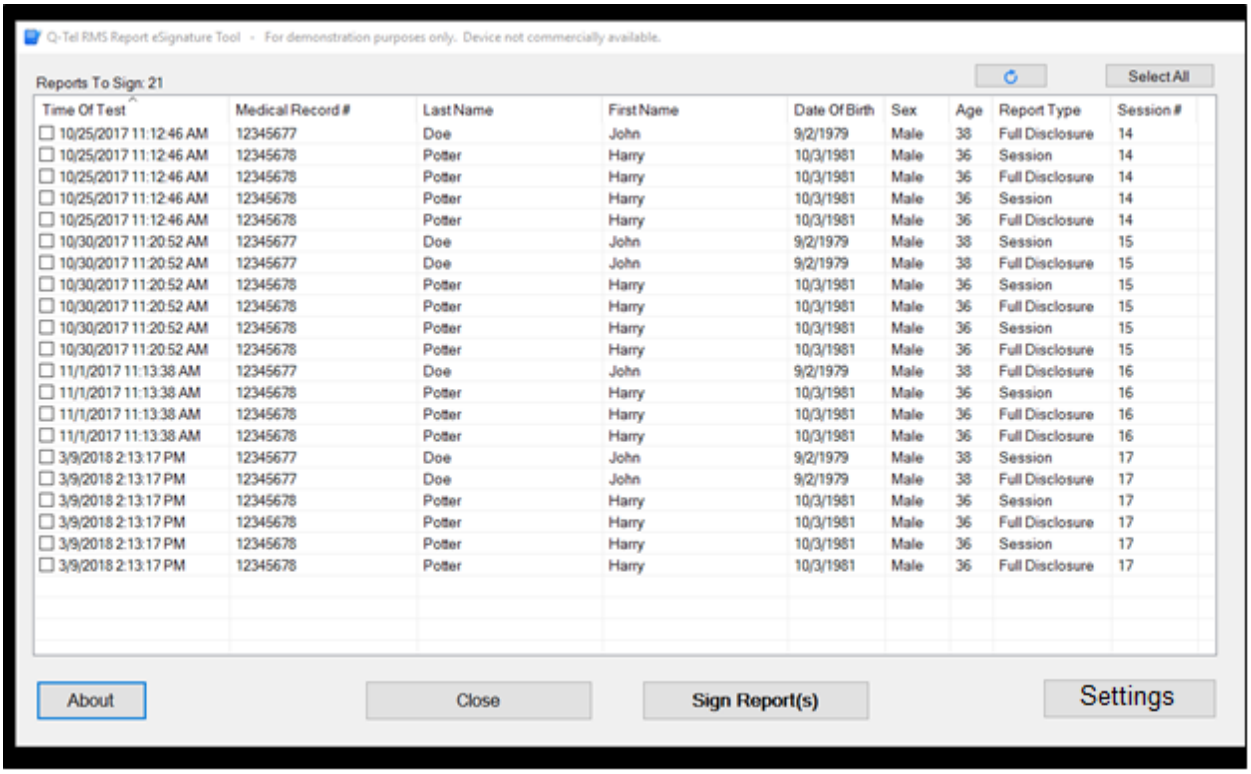
Note: If IT Policy has not already defined the default paths and report types, the initial application screen titled Specify Paths and Report Types will be displayed the first time the application is run. This screen is accessible through selection of the Settings button in the Report (pending signature) display.



2. Browse to (or type in) desired Input and Output Report File Paths.
3. The default report selection is set to **Include Session Reports**. Click the checkboxes to change this setting.
4. Once the desired screen options are selected, click **OK**.

Note: For help on later changing the values entered (as defined in the computer's registry), see the **IT Professional Settings and Information** section in this manual.

Reports (pending signature) are now displayed.



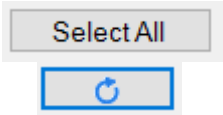
Note 1: Only reports located in the defined **Input Report File Path** directory are displayed.

Selecting Report(s) for Signature

1. Use the checkboxes to select one or more report.

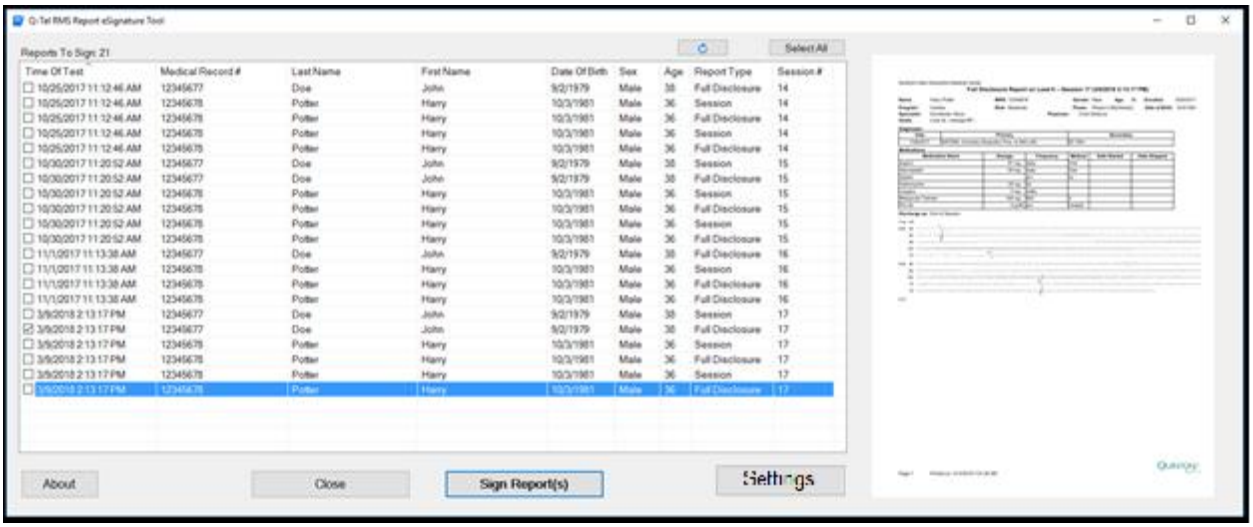
   Use the Select All button to select all displayed reports.

   Use the refresh button to deselect all reports.



Report Preview

To view a report preview, click on a line item to highlight. The first page of the report displays on the right side of the screen.



Comprehensive Report View

Double click a report line item to view the full report. A new window opens in the PDF reader application.

Note: When selecting a report view in this fashion, the report is also automatically selected ☑. If signing the report is not desired, the report(s) should be deselected ☐ after viewing.

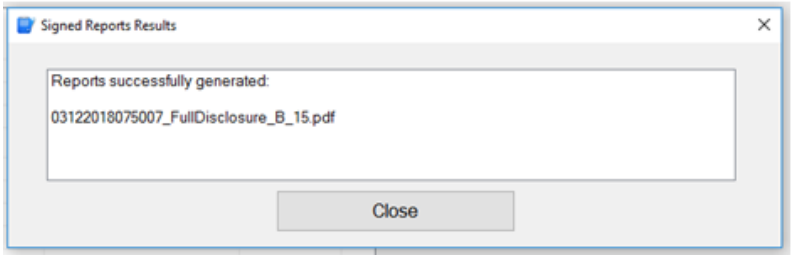
Signing Report(s)

Any individual or group of reports selected can be electronically signed by clicking **Sign Report(s)**.

Note (for IT department): Before signing can be completed, users with authorization to sign reports need to be added to the Windows Active Directory group **QTelReportSigners**. Alternatively, an approval domain group of the organization's choosing can be added to the Windows registry. Reference the **IT Professional Settings and Information** section of this document for registry setting information.

Once electronically signed, the Signed Reports Results screen will verify which signed reports were generated. These signed reports can now be found in the **Output Report File Path**.

After confirming report(s) were successfully generated, click **Close**.



IT PROFESSIONAL SETTINGS AND INFORMATION

Changing Registry Values

Note: Changing or setting Registry values is not required to run the application if the organization uses the application default values. The following are a list of default values that can be customized via the Windows Registry if desired:

- Report Types displayed to users (applied filter) – Session Reports *default*
- Time/Date formats used - *default* to local Windows regional settings
- Active Directory attribute used for Signer's full name – displayName *default*
- Active Directory attribute used for Signer's credentials – title *default*
- Active Directory group membership required for Signer authorization – QTelReportSigners *default*
- Unsigned Input Report Path (can also be set by user)
- Signed Output Report Path (can also be set by user)

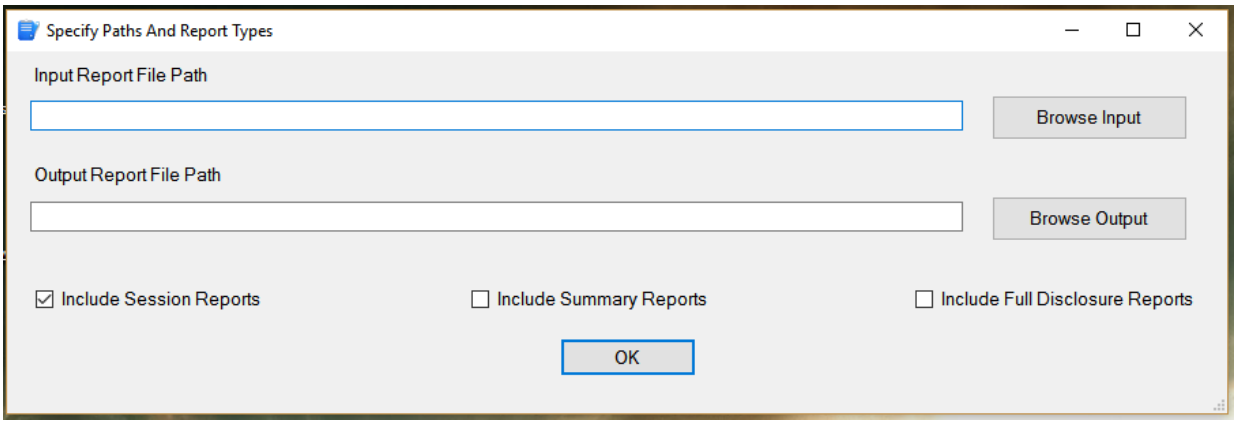
All below attributes can be initially set, or changed by IT Policy via the Windows Registry.

REGISTRY VALUE	DESCRIPTION	VALID VALUES
HKCU\Software\Quinton\QTelReportSigner@DefaultUnsignedReportInputPath	Unsigned Report Input path	Valid Directory Location
HKCU\Software\Quinton\QTelReportSigner@DefaultSignedReportOutputPath	Signed Report Output path	Valid Directory Location
HKCU\Software\Quinton\QTelReportSigner@ReportTypes	List of report types to display to user in the list of reports to sign	Any combination of: ▪ **Session** *(default)* ▪ Summary ▪ FullDisclosure
HKCU\Software\Quinton\QTelReportSigner@ReportDateTimeFormat	Date Time format used to display Time of Test to users and to sign reports	Any valid date/time format string (e.g. "yyyy-MM-dd H:mm:ss tt") *Default is local Windows regional setting*
HKCU\Software\Quinton\QTelReportSigner@DateOnlyFormat	Date Time format used to display Date of Birth	Any valid date/time format string (e.g. "yyyy-MM-dd H:mm:ss tt") *Default is local Windows regional setting*
HKLM\Software\WOW6432Node\Quinton\QTelReportSigner@LDAPAttributeNameForFullName	Active Directory attribute name used for signer's name instead of the **default "displayName"**	Any valid Active Directory attribute

REGISTRY VALUE	DESCRIPTION	VALID VALUES
HKLM\Software\WOW6432Node\Quinton\QTelReportSigner@LDAPAttributeNameForTitle	Active Directory attribute used instead of the **default "title"** for signer's credentials	Any valid Active Directory attribute. If value is present but left blank the signer's credentials will be omitted from the signature
HKLM\Software\WOW6432Node\Quinton\QTelreportSigner@RequireLDAPS		True (only LDAPS will be allowed for authentication) **False** (or blank will allow LDAP or LDAPS authentication)
HKLM\SOFTWARE\WOW6432Node\Quinton\QTelReportSigner@RequiredGroupName	Active Directory group containing authorized signers	Any Active Directory group authorized to sign reports. *Default is* ***QTelReportSigners***

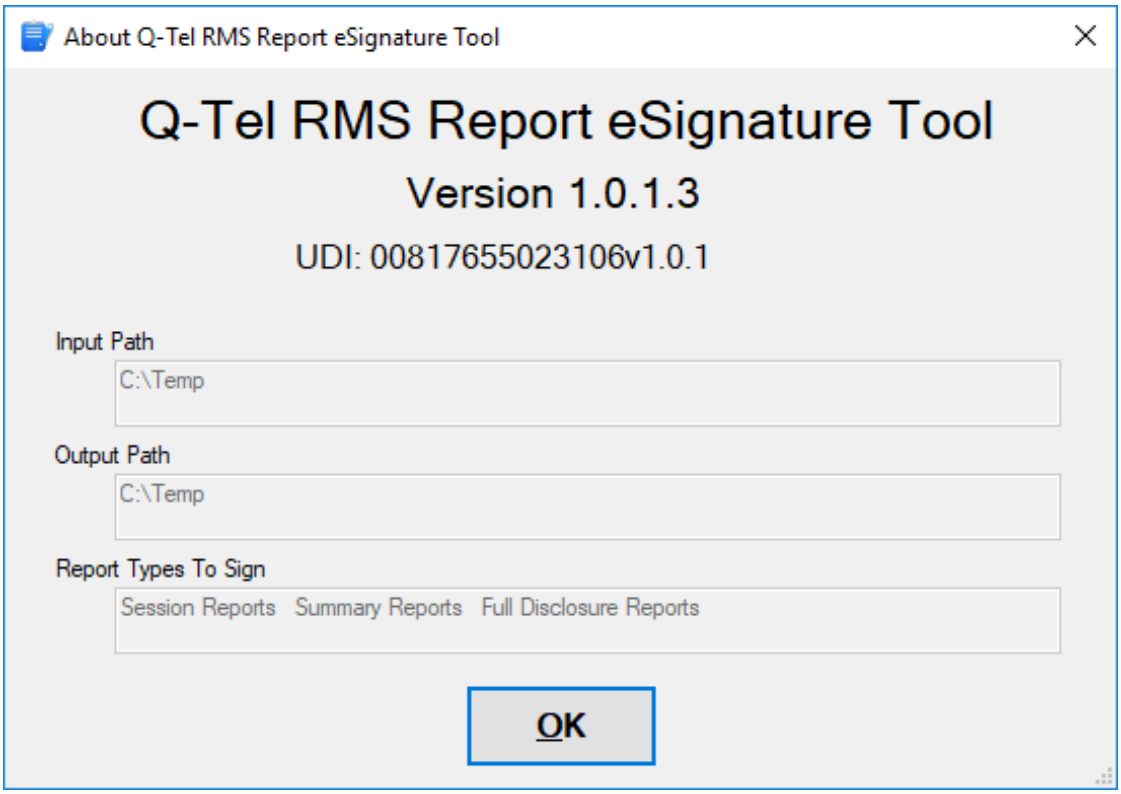
Settings

Selection of the Settings button in the Reports screen will present the dialog allowing selection of Input and Output Report File Paths, and report types you wish to include. Once selections are defined and the OK button is selected, the application will refresh the list of available reports.



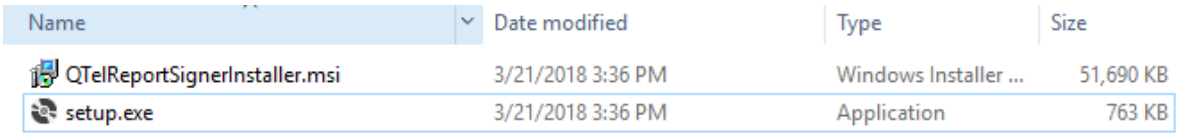
About this Software

Once in the Q-Tel application, the values defined for **Input Path**, **Output Path**, **Report Types to Sign** and the software version can be viewed by selecting **About**.

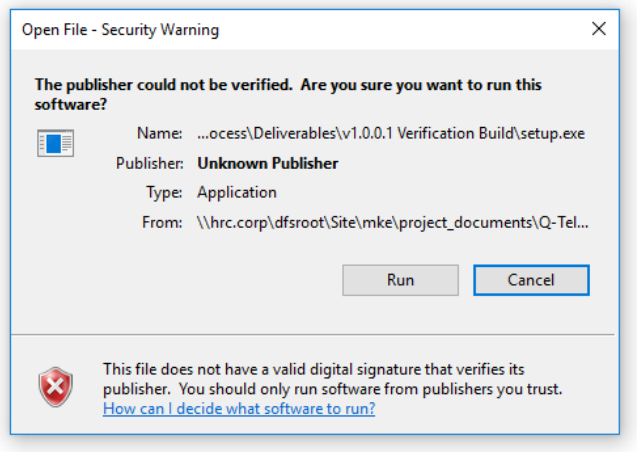


Repair or Removing the Application

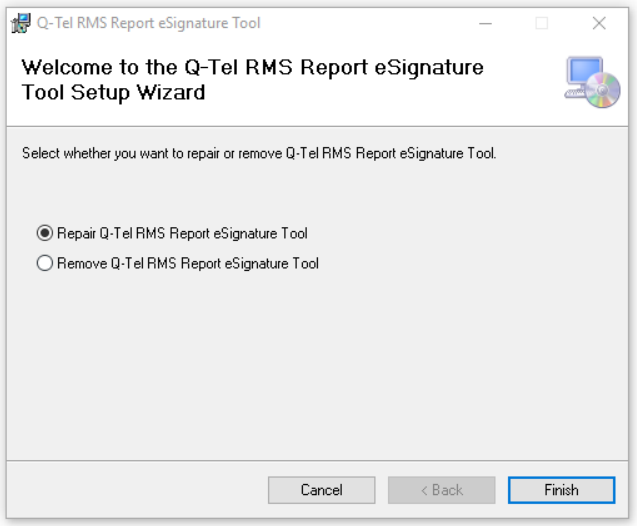
Note: The user must be a direct member of the authorized domain group and credentials must be successfully authenticated to repair or remove this application.Navigate to the location containing the installation files.



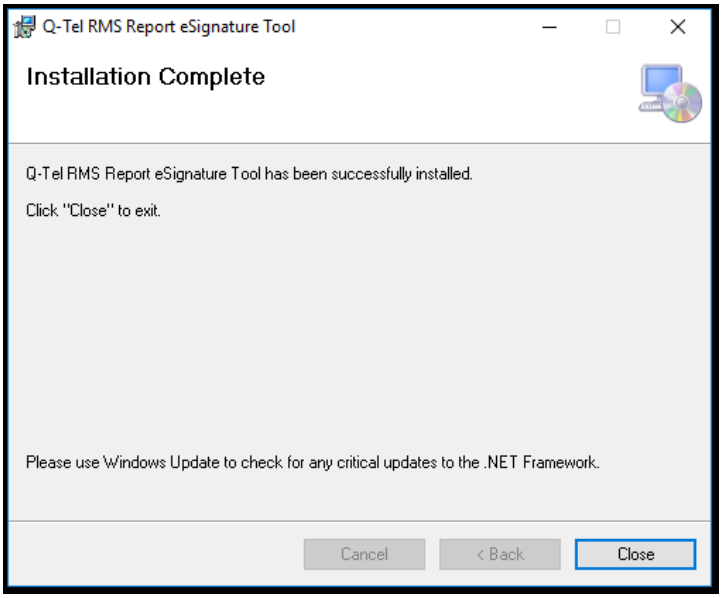
1. Right click **setup.exe**, then select **Run as administrator.**
2. If prompted with a security warning window, select **Run** to continue. Otherwise proceed to the following step.



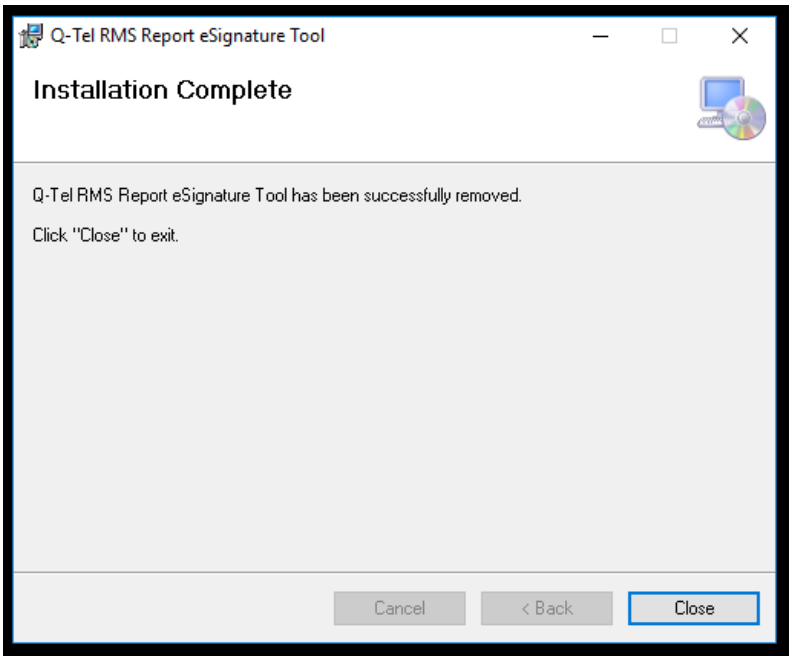
3. Select either the repair or remove option, then click **Finish**.



If repair was run, the following screen will be displayed indicating success.



If removal was run, the following screen will be displayed indicating success.



APPENDIX A – TROUBLESHOOTING

- The application must be installed on a PC running Windows 7 (32-bit or 64-bit) or Windows 10 OS.
- The application must be installed on a PC that has direct local or network access to the Q-Tel session reports and the destination signed report directory.
- Users that sign reports must belong to the designated active directory group to allow for authentication of signer credentials.
- The signing users' active directory profiles should include their full name as it is intended to appear on the signed report.
- Optionally, the signing users' active directory profiles should include their Title as it is intended to appear on the signed report.
- The application does not store a list of users or user credentials.
- The eSignature application works with reports exported from Q-Tel v4.0.0 and later.
- The application will only interface to directory services via LDAP and LDAPS protocols.
- The input directory must be organized with each patient's reports placed in a separate sub-directory containing the Q-Exchange XML file(s) and PDF file(s) for that patient.
- The Input File Path must provide read access to the currently logged in user as well as read and write access to the signing user.
- The Output Path must provide read and write access to the signing user and the currently logged in user must be able to test for the directory's existence.
- The computer on which the application runs requires the following open network ports:
    - LDAP: 389; LDAPS: 636
- For LDAPS only: The computer the application runs on must have the root Certificate Authority certificate used to sign the authenticating Windows Active Directory server's certificate installed in the Trusted Root Certification Authorities container of the logged in user's personal certificate store.
- The application requires permission to make LDAP or LDAPS queries against the currently available Active Directory domain.
- It is recommended the ReportTypes, DefaultUnsignedReportInputPath and DefaultSignedReportOutputPath registry values be set by IT Group Policy to ensure that all users within an organization have a consistent list of reports.
- Users *must* specify directories as UNC (Universal Naming Convention) paths and cannot use locally mapped network drives to define network paths in the application.