

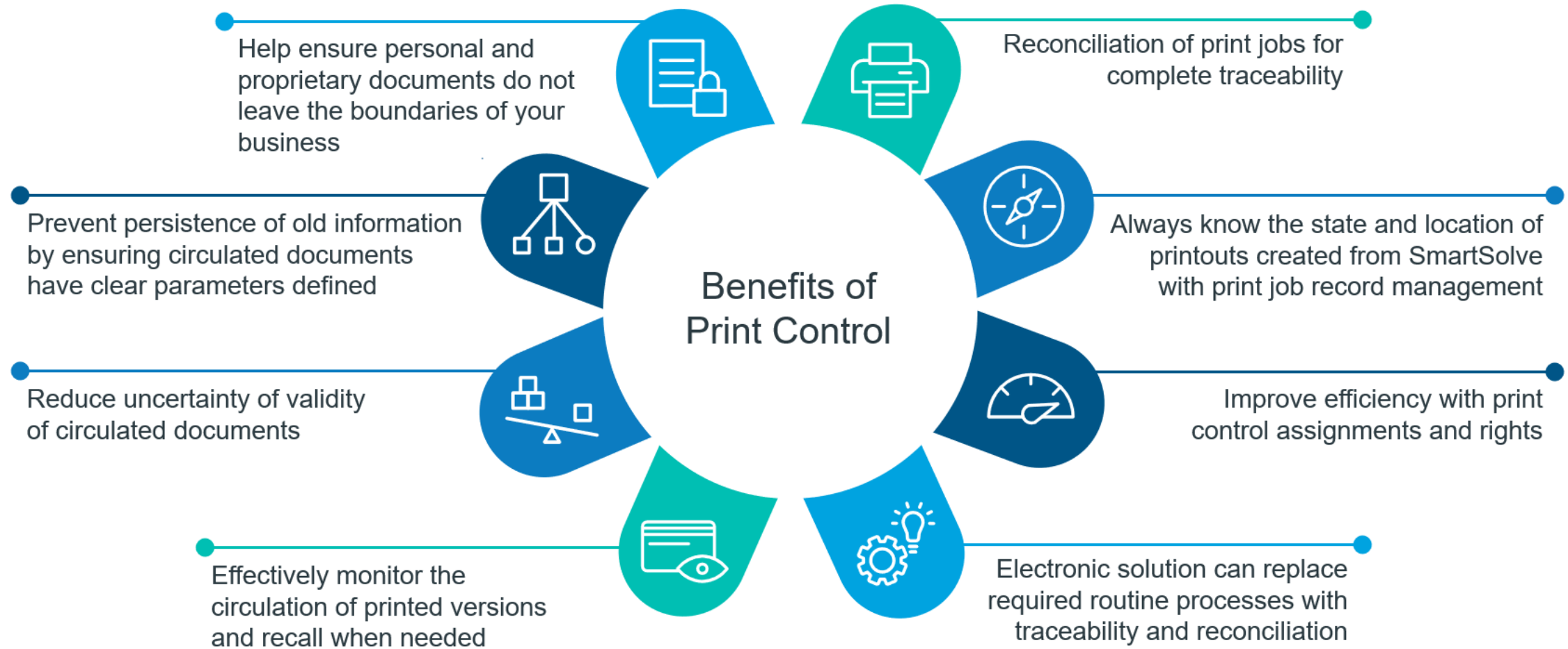
# Customer Knowledge Transfer

*Document Management - Print Control*

Kate McTavish, Product Manager

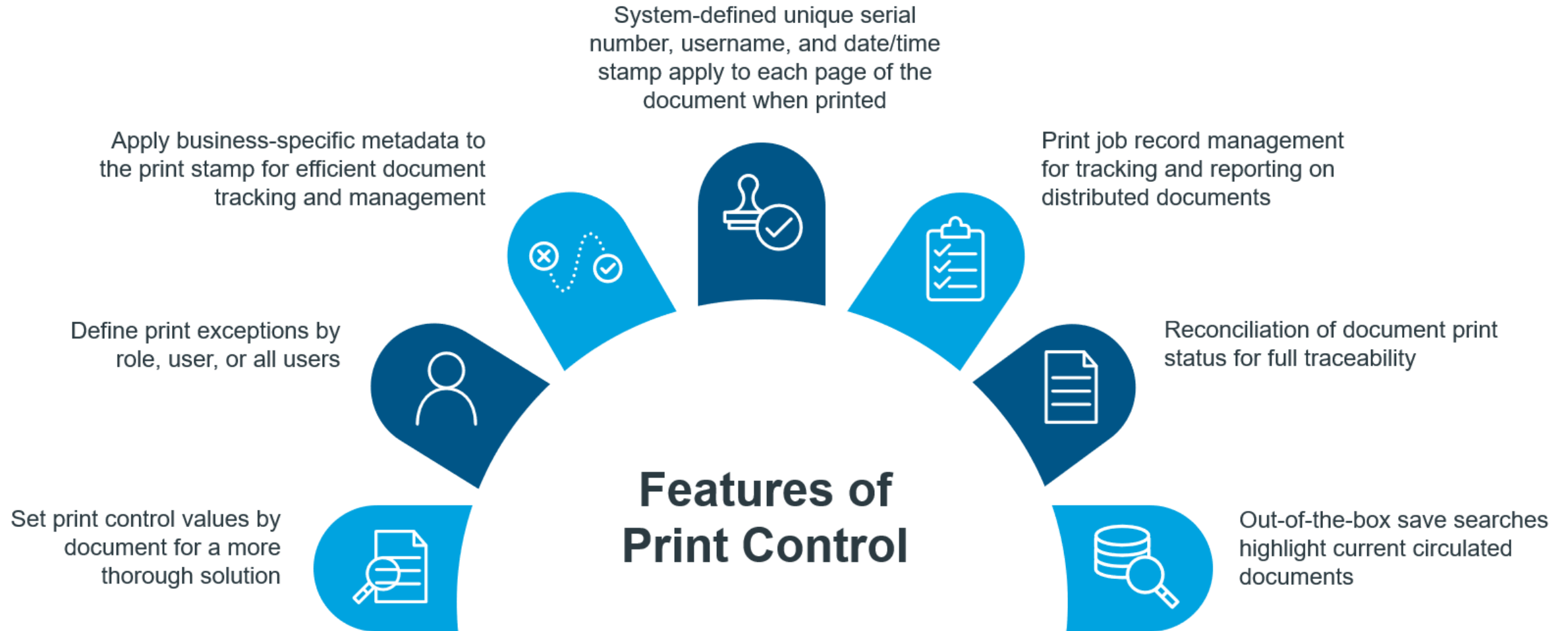
# Print Control

## Benefits of Print Control



# Print Control

## Features of Print Control



# Demo Print Control



# Setup & Define Print Controls



# Print Control

## *License & Rights to Print Control*

Print Control license is required in order to define and manage document print controls. Once the license is assigned, the following rights are required in order to manage and define Print Control settings.

The following rights provide access to the Action menu **Manage Print Control**:

Rights Group= **Print Control Manage**

The following rights provide access to manage the **Print Job**:

Rights Group= **Print Job Owner**

Rights Group= **Print Job Supervisor**

*Note: If print control rights are added to a user and they don't have the license, they will not be able to log into SmartSolve and will get 51058 error message*

# Print Control

## After Installation

### After Print Control license is installed

The document printing capabilities will not change until the Print Control is enabled at the document record.

All document records are defaulted to disable under the print control settings once the Print Control license is applied.

Disabled Print Control means the document record may be printed by anyone, and the Print Control print stamp will be not be applied to the document once printed.

Users may print and download the document in the same manner as before the install.

☆ DOC-165-NUM [A]

Document Revision: A Title: Title.2 Type: CT12 Machine Owner: SMARTADMIN Effective Date: 09-Aug-2022  
Expiration Date: --- Site: --- Status: Current

Enable Author	No
Collaborate Document	Yes
Collaboration Due (days)	10
Approve Document	Yes
Approval Due (days)	5
Get Feedback during Periodic Review	Yes
Feedback Due (days)	5
Access Restrictions	None
Applicable Security	Manage and View
Supersede Previous Revision in Reference	Yes
▼ Print Control Settings	
Print Control	Disable
▼ Periodic Review Schedule (# of calendar days)	
Interval for Periodic Review (days)	365

# Print Control

## Enabling Print Control

### Enabling Print Control on a document- Action menu

The Action menu **Manage Print Control** appears on the document record once the rights group **Print Control Manage** is assigned.

Manage Print Control Action menu takes user to the **Print Control Settings** for the document record.

Manage Print Control Action menu is accessible throughout the *active* document lifecycle and may be adjusted at any time.

*Note: User must have access to the document record in order to print*

The screenshot displays a document record interface with a top navigation bar containing 'Task', 'Action', 'Print', and 'Edit Forms' menus. The 'Action' menu is open, showing a list of options: 'Update Document Information', 'Manage Properties', 'Manage Certification', 'Manage Certification Role', 'Manage Attachments', 'Manage Document References', 'Manage Print Control' (highlighted with a red box), 'Update MDF and PMF', and 'Schedule Periodic Review'. Below the menu, the 'Print Control Settings' section is visible, showing 'Print Control' set to 'Enable' and 'Allow Download' set to 'Yes'. Other sections include 'Download Settings', 'Print Control Stamp', and 'Print Control Users'.

# Print Control

## Enabling Print Control

### Enabling Print Control on a document- Print Control Settings

The following Print Control Settings are exposed when the Print Control is **Enabled** on the document record:

Allow Download – Prevent download of the document from SmartSolve. Applies to the document and not by user.

Print Control Stamp – Apply a timeframe text in the print stamp for how long the printed document is valid, Out-of-the-box options include 24,48, and 72 hours and may be adjusted in the System Wide- List = **Document Print Control Stamp**.

Print Control Users – Assign all, one, or many users as approved print staff.

The Print Control settings may be viewed from the Document Detail page under the Policy and Due Dates section →

▼ **Print Control Settings**

Disable - this document has no additional print controls in place  
Enable - this document has print controls in place based on the settings below

Print Control \*

Disable  Enable

▼ **Download Settings**

Allow Download \*

Yes  No

▼ **Print Control Stamp**

Customize the document print stamp

Apply Valid For Stamp

▼ **Print Control Users**

The following users may print this document

▼ <b>Print Control Settings</b>	
Print Control	Enable
Apply Valid For Stamp	Yes
Valid For	24 Hours
All Users	Yes

# Print Control

## Defining Print Control Users

### Enabling Print Control on a document- Print Control Users

Three options available when defining who may print the document:

1. All Users: new feature provides the ability to mass assign all SmartSolve users the ability to print a Print Controlled document so that the print control stamp and print job traceability is applied when the document is printed from SmartSolve
2. Assign print users by role or by user
3. If no print control users are assigned, no one may print the document from SmartSolve

▼ **Print Control Users**

The following users may print this document

All Users + Add

Role	User
If only Role field is used, then all users within that Role may print	
<input type="text" value="RA Specialist"/> <input type="button" value="🔍"/>	<input type="text" value="RA Specialist"/> <input type="button" value="🔍"/> <input type="button" value="🗑️"/>
If Role and User field is used, then only the User from that Role may print	
<input type="text" value="Pharma Reg Spec."/> <input type="button" value="🔍"/>	<input type="text" value="PHARMA1"/> <input type="button" value="🔍"/> <input type="button" value="🗑️"/> Pharma User 1

# Printing



# Print Control

## *Print File Button*



Once Print Control is enabled on the document record, only those users assigned in the Print Control Settings may print the document from SmartSolve.

A new **Print File** button is located on the PDF (secondary format) file viewer, or primary file if secondary format is not generated.

Only documents printed using the **Print File** button will have the Print Settings applied, including business defined print stamp and print job traceability.

### **NOTE:**

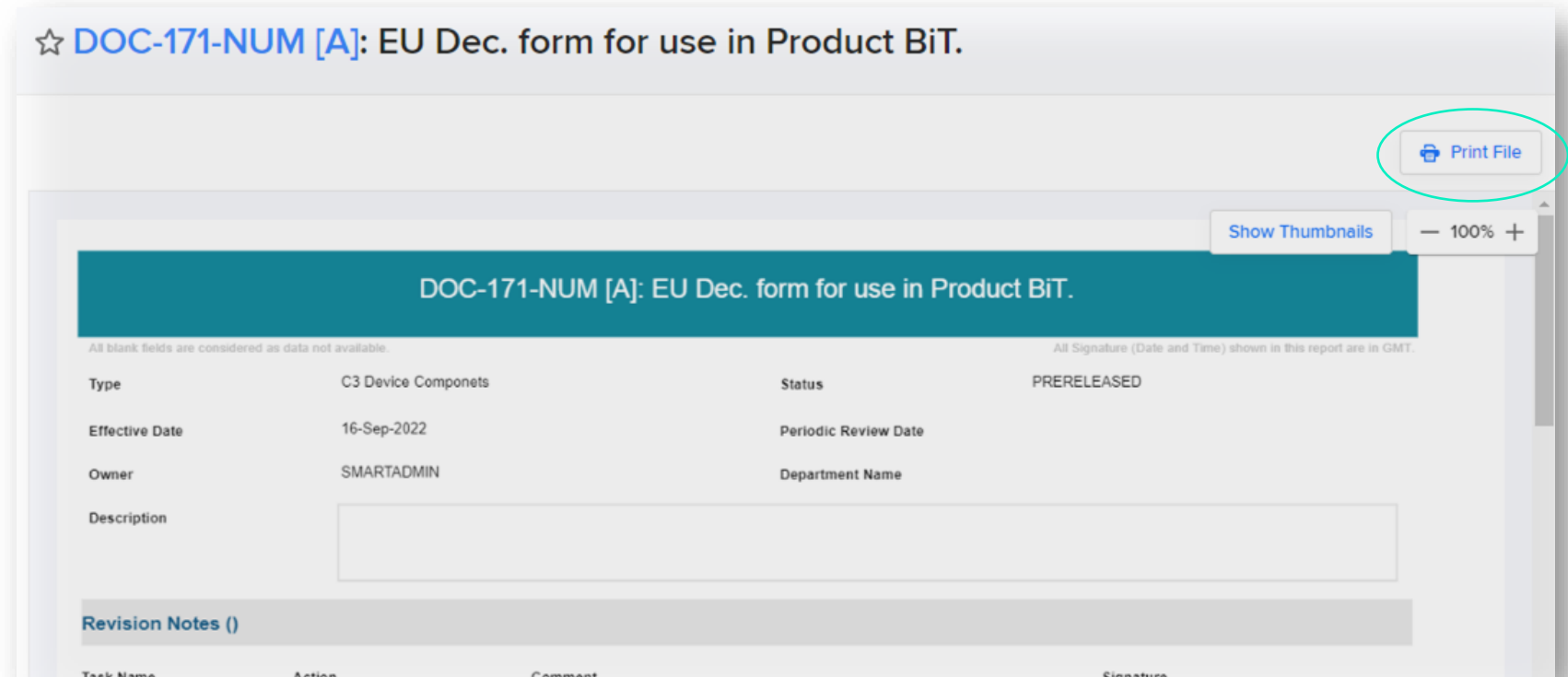
- ✓ **Business rules should be in place to ensure documents are only printed using the new Print File button**
- ✓ **Recommend disabling the option to download the document will help ensure the document is not printed outside of SmartSolve**

# Print Control

## Location of Print File Button

The **Print File** button is found in the File Viewer accessed from the PDF File hyperlink (secondary format).

Unless secondary file format is not enabled, then it will appear in the File Viewer accessed from the Primary File hyperlink.



Note: In order to apply the Print Control print stamp, if secondary file type is not enabled, the primary file is produced as a PDF when printing a Print Controlled document in order to print with the Print Control print stamp (*the following file types are supported when converted to PDF: .pptx .xlsm .xlsx .docx .dotx .pdf .vsdx .txt .png*)

# Print Control

## Print Dialog Box

Clicking the **Print File** button results in a print dialog box that allows the print user to add additional print stamp details and justification for printing.

Additional Text: Free text field that holds 60 characters and displays in the print stamp on each page of the document

Justification: Free text field does not display on the printed document

Number of Copies: Captures the number of copies print user will print for traceability and reconciliation

Clicking “Request to Print” captures the print details for the print job record and triggers the client's printer dialog box to complete the print job.

**Document Print Control**

Document Number	Document Title	Print Status
DOC-171-NUM [A]	EU Dec. form for use in Product BIT.	Print Requested

Rows: 5 | Item 1 of 1 | Page 1 of 1

**Additional Text**  
  
Text entered will be included in the standard print stamp text and will display on each page of the document

**Justification**  
  
Text entered will not be included in the print stamp

**Number of requested copies**  
  
Selection for number of copies will need to be entered again at the browser print dialog box to ensure the copies requested match the number defined here

Cancel Request Print

# Print Control


## Sign-off

### Sign-off message

In an effort to highlight the importance of following through on the print request, a detailed message is provided upon sign-off that user is acknowledging they will continue to complete the process which includes submitting the final print request through their browser or client supported print dialog box with the correct number of copies.

Meaning: You are about to sign-off acknowledging you will complete the print control request with 6 copy(ies). Print Document Request

XXXXXXXXXXXX@XXXX.com

..... 

Sign-off

*SIGNATURE ALERT: Your user ID and password constitutes the application of your electronic signature (and any comments) to this record and is considered the legally binding equivalent of your handwritten signature.*

# Print Control

## Print Stamp

The following will appear on each page of the printed document based on the Print Control settings and details entered in the Print Dialog Box:

Unique Serial Number: This is system generated and cannot be edited by any user

Printed by: Captures the person who requested to print the document

Date and Time captures the date and time the *Request to Print* button was clicked (*default time zone is print user time zone*)

Free Text: (Optional) text captured at the “Additional Text” in the print dialog box

Valid for: (Optional) timeframe the document is valid for if enabled at the Print Control Settings



# Print Job Management



# Print Control

## Print Job Management

Anyone assigned as print user may print the document, however in order to view and manage print jobs, user must have Print Job rights.

Rights Groups: **Print Job Owner & Print Job Supervisor** gives user access to the following:

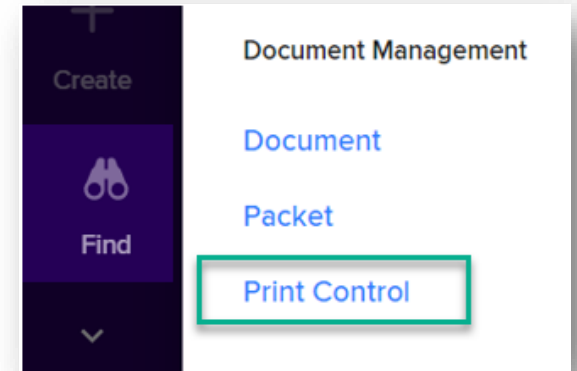
- ✓ Print Control tab off the document record (allows users to view and access all print jobs for that document)
- ✓ Print Control access from the Document Management > Find menu (allows users to view and access all print jobs for all documents)
- ✓ Print Control Workspace (Dashboard view of all active print jobs)

# Print Control

## Print Job Management

### Print Job management from the Document Management> Find menu

With one of the following rights groups, user has access to Print Control menu from the Document Management> Find menu: Print Job Owner & Print Job Supervisor



The Print Control is a new entity that contains the details of each print job for easy traceability and reconciliation of circulated documents.

The OOB save searches are All Print Control Jobs & Open Print Control Jobs.

Show

Print Job Number	Serial Number	Print Owner	Printed Date/Timestamp	Number of requested copies	Status
<a href="#">Print Job 2022-490</a>	7dd4ff8b-5513-4bad-8ad7-cf871a77f99d	SMARTADMIN	04 Aug 2022 13:19:02 Eastern Standard Time	5	Active
<a href="#">Print Job 2022-489</a>	df1a02b6-78d3-4601-9967-070106e6b720	SMARTADMIN	29 Jul 2022 08:09:15 Eastern Standard Time	2	Active
<a href="#">Print Job 2022-488</a>	80660f71-1e62-44d6-86a6-fbfe9a1ef03	SMARTADMIN	27 Jul 2022 08:13:27 Eastern Standard Time	1	Closed
<a href="#">Print Job 2022-487</a>	db095e47-3940-4b9d-bbe9-6b12e8b0927f	SMARTADMIN	27 Jul 2022 07:15:06 Eastern Standard Time	1	Closed
<a href="#">Print Job 2022-486</a>	8ff80777-4232-406b-a72e-ed4e69f40069	SMARTADMIN	25 Jul 2022 04:06:09 Eastern Standard Time	1	Active
<a href="#">Print Job 2022-485</a>	11e1894a-27e0-4fe2-88da-df55411fa530	SMARTADMIN	25 Jul 2022 04:05:34 Eastern Standard Time	1	Active

[Advanced Search](#) [↔]

# Print Control

## Print Job Management

### Print Job Management from within the Document:

With one of the following rights groups, user has access to the Print Control tab found on the Document record:

- Print Job Owner
- Print Job Supervisor

Print Job Number	Serial Number	Copy	Print Owner	Delivered To	Printed Date/Timestamp	Print Status
<a href="#">Print Job 2022-490</a>	7dd4ff8b-5513-4bad-8ad7-cf871a77f99d	1 of 5	SMARTADMIN	SMARTADMIN	04 Aug 2022 13:19:02 Eastern Standard Time	DELIVERED
<a href="#">Print Job 2022-490</a>	7dd4ff8b-5513-4bad-8ad7-cf871a77f99d	2 of 5	SMARTADMIN	KR1	04 Aug 2022 13:19:02 Eastern Standard Time	DESTROYED
<a href="#">Print Job 2022-490</a>	7dd4ff8b-5513-4bad-8ad7-cf871a77f99d	3 of 5	SMARTADMIN		04 Aug 2022 13:19:02 Eastern Standard Time	Print Requested
<a href="#">Print Job 2022-490</a>	7dd4ff8b-5513-4bad-8ad7-cf871a77f99d	4 of 5	SMARTADMIN		04 Aug 2022 13:19:02 Eastern Standard Time	Print Requested
<a href="#">Print Job 2022-490</a>	7dd4ff8b-5513-4bad-8ad7-cf871a77f99d	5 of 5	SMARTADMIN		04 Aug 2022 13:19:02 Eastern Standard Time	Print Requested

This tab only appears when Print Control is enabled on the document. This tab provides a view of the print jobs requested for this document and revision.

Clicking the hyperlink on the Print Job Number will take user to the Print Job record so they may manage the print status of the circulated documents within the Print Job.

*Note: The Print Control details only appear on the current version for which it was printed.*

# Print Control

## Print Job Management

### Print Job Management from Dashboard

With one of the following rights groups, user has access to the Print Control Workspace save search found on the SmartSolve Dashboard:

- Print Job Owner
- Print Job Supervisor

Show Active Print Control Job Requests ▾

Active Print Control Job Requests Advanced Search ↗

Print Job Number	Serial Number	Copy	Document Number	Document Revision	Document Title	Print Owner	Printed Date/Timestamp	Print Status
<a href="#">Print Job 2022-5</a>	6b5935c0-575f-41ff-a898-77aca3ed3b00	1 of 2	DOC-168-NUM	A	Users accessing download document content	SMARTADMIN	13 Sep 2022 15:11:12 Eastern Standard Time	Print Requested
<a href="#">Print Job 2022-5</a>	6b5935c0-575f-41ff-a898-77aca3ed3b00	2 of 2	DOC-168-NUM	A	Users accessing download document content	SMARTADMIN	13 Sep 2022 15:11:12 Eastern Standard Time	Print Requested
<a href="#">Print Job 2022-4</a>	79d26c31-6877-4940-8440-2c1c020ea5f5	1 of 1	REGDOC-79	1	Audit certifications and report for Atenolol - 66588n	SMARTADMIN	13 Sep 2022 13:01:35 Eastern Standard Time	Print Requested
<a href="#">Print Job 2022-2</a>	e2824913-03d3-4c74-9b05-16624396d169	2 of 8	REGDOC-80	2	Antiviral reports for BioTin - S8857	SMARTADMIN	13 Sep 2022 12:51:40 Eastern Standard Time	DELIVERED
<a href="#">Print Job 2022-2</a>	e2824913-03d3-4c74-9b05-16624396d169	6 of 8	REGDOC-80	2	Antiviral reports for BioTin - S8857	SMARTADMIN	13 Sep 2022 12:51:40 Eastern Standard Time	Print Requested
<a href="#">Print Job 2022-2</a>	e2824913-03d3-4c74-9b05-16624396d169	7 of 8	REGDOC-80	2	Antiviral reports for BioTin - S8857	SMARTADMIN	13 Sep 2022 12:51:40 Eastern Standard Time	Print Requested
<a href="#">Print Job 2022-2</a>	e2824913-03d3-4c74-9b05-16624396d169	8 of 8	REGDOC-80	2	Antiviral reports for BioTin - S8857	SMARTADMIN	13 Sep 2022 12:51:40 Eastern Standard Time	Print Requested
<a href="#">Print Job 2022-1</a>	73caab12-8606-4f90-9557-a0693da7d2d1	1 of 1	DOC-171-NUM	A	EU Dec. form for use in Product BIT.	SMARTADMIN	13 Sep 2022 12:35:34 Eastern Standard Time	DELIVERED

Each copy of the print job that remains active will display, to help manage currently circulated copies of the documents.

Clicking the hyperlink on the Print Job Number will take user to the Print Job record so they may manage the print status of the circulated documents within the Print Job.

*Note: Since several copies could be requested within a Print Job, the Print Job record number and corresponding metadata will display multiple time in this view.*

# Print Control

## Print Job Record

The Print Job record is a new entity that contains the details of each print job for easy traceability and reconciliation of circulated documents.

- Details included on the print stamp, along with justification and copies are stored for each Print Job request
- Print status, delivered to and additional notes may be added to each copy of the Print Job
- Print Job records have an OOB numbering scheme (Print Control Job Numbering) which includes the year the record was created and unique number
- A print Job Record is Active only while each printed copy is in circulation, once the status is changed to show all copies are no longer in circulation then the Print Job record will close
- Audit Trail provides traceability for updates to the Print Job record

### ☆ Print Job 2022-433

Serial Number: 88928eef-da8a-47b7-b3c9-64f7041ff4b3    Print Owner: SMARTADMIN    Printed Date/Timestamp: 21 Jul 2022 08:54:41 Eastern Standard Time    Task ▾    Action ▾    Edit For

Status: Active

**Detail**    Activity (2)

Print Stamp    Serial Number 88928eef-da8a-47b7-b3c9-64f7041ff4b3 Printed by SYSTEM ADMINISTRATOR (SMARTADMIN) on 21 Jul 2022 08:54:41 Eastern Standard Time

Justification    ---

Copy	Document Number	Print Status	Delivered To	Note
1 of 33	<a href="#">DOC-73-NUM [A]</a>	Delivered	RUTH RUTH THOMAS	
2 of 33	<a href="#">DOC-73-NUM [A]</a>	Delivered	USER1 USER ONE	
3 of 33	<a href="#">DOC-73-NUM [A]</a>	Destroyed	PERSON1 Person1 One	
4 of 33	<a href="#">DOC-73-NUM [A]</a>	Print Requested		
5 of 33	<a href="#">DOC-73-NUM [A]</a>	Print Requested		
6 of 33	<a href="#">DOC-73-NUM [A]</a>	Print Requested		
7 of 33	<a href="#">DOC-73-NUM [A]</a>	Print Requested		
8 of 33	<a href="#">DOC-73-NUM [A]</a>	Print Requested		
9 of 33	<a href="#">DOC-73-NUM [A]</a>	Print Requested		
10 of 33	<a href="#">DOC-73-NUM [A]</a>	Print Requested		

- Print Status will display as Print Requested by default
- Hyperlink takes user to the Document record

# Print Control

## Print Job Record

### Action menu

Active Print Job records may be managed from the Action menu > Update Print Status

- For each copy define who received the copy and the current print status of the circulated document
- OOB print status are provided and may be managed using Systemwide- Lists- **Print control Status**
- Delivered To is a zoom field to All Users
- Optional note at each copy and required comment upon sign-off of the Print Job record
- Once a copy is marked as one of the following status, it will no longer be editable:
  - Destroyed
  - Damaged
  - Did not Print
  - Returned

☆ Print Job 2022-490 Update Print Status

Serial Number: 7dd4ff8b-5513-4bad-8ad7-cf871a77f99d    Print Owner: SMARTADMIN    Printed Date/Timestamp: 04 Aug 2022 13:19:02 Eastern Standard Time  
Status: Active

Task ▾    Action ▾    Edit Forms ▾

Update Print Status

Copy	Document Number	Print Status	Delivered To	
1 of 5	DOC-128-NUM [A]	Delivered	SMARTADMIN	
2 of 5	DOC-128-NUM [A]	Destroyed	KR1	
3 of 5	DOC-128-NUM [A]	Print Requested		
4 of 5	DOC-128-NUM [A]	Print Requested		
5 of 5	DOC-128-NUM [A]	Print Requested		

Comment \*

Update Print Status

Copy: 1 of 5  
Document Number: DOC-128-NUM  
Document Revision: A

Print Status \*  
Delivered

Delivered To: SMARTADMIN (SYSTEM ADMINISTRATOR)

Note: upload to kiosk

Cancel    Sign-off

- A print Job Record is Active only while each printed copy is in circulation, once the status is changed to show all copies are no longer in circulation then the Print Job record will close

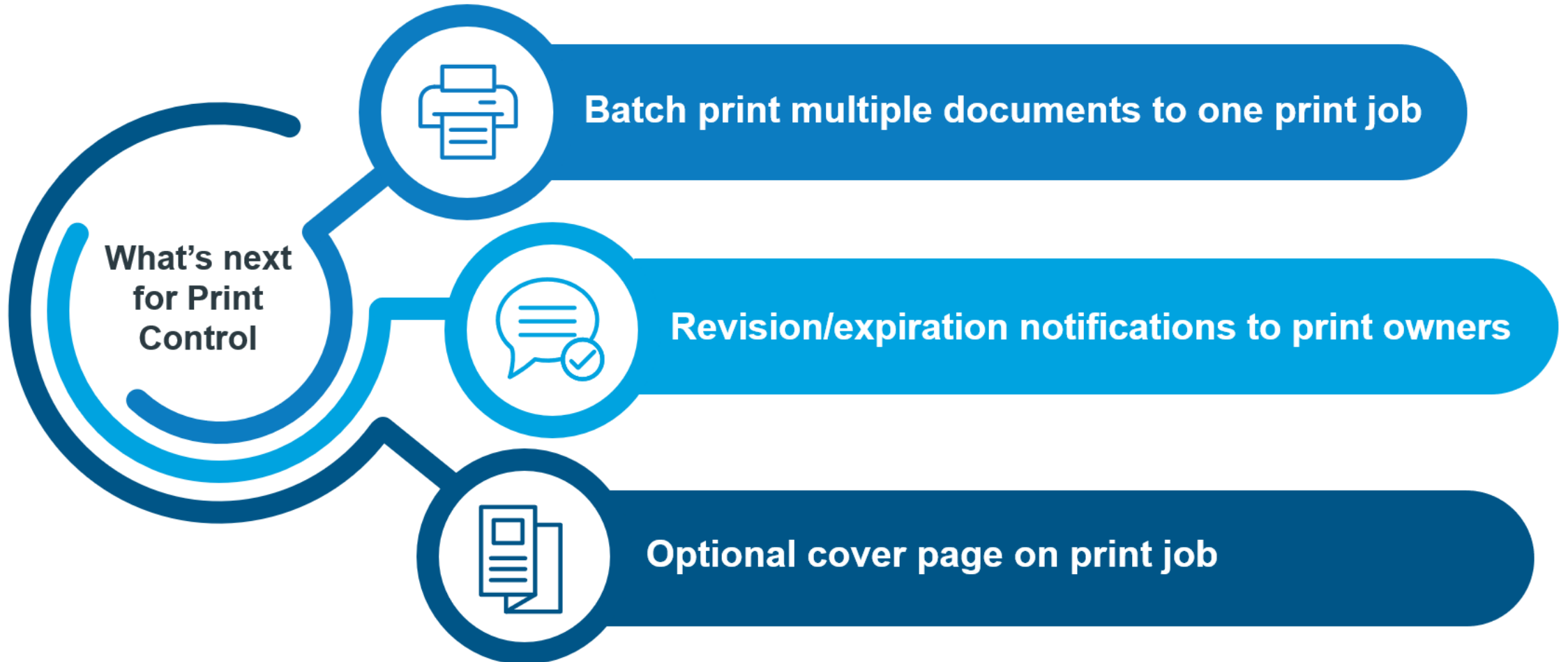
# Print Control

## *Important Things to Know*

- ❖ Print Control is an add-on to Document Management – *please see your Practice Director to discuss licensing*
- ❖ Pre-requisites: SmartSolve v11 2022 R2 & Document Management 6.1
- ❖ When printing a document, it is transitioned to a PDF as standard, which also allows for the print stamp to be applied to primary or secondary file
  - This means the document record does not require “secondary format” to be enabled in order for the document to have print control features applied
  - The print stamp and print controls will apply to the primary format or secondary format if enabled
- ❖ The Print Control “Print File” button is found in the primary file viewer, unless secondary format is generated, then it will be found in the secondary file viewer
- ❖ Client-side print dialog box may require the print page setting is set to “fit to scale” in order to view the print stamp once the document is in paper format
- ❖ Print stamp will be applied to each page of each copy printed
- ❖ Unique serial number is included in the print stamp and is not editable to ensure a fully controlled value
- ❖ The Print Job record is a new entity that contains the details of each print job for easy traceability and reconciliation of circulated documents.

# Print Control

*What's Next for Print Control*



Thank you! Please contact us for more information



**Kate McTavish**

*Product Manager, Quality Compliance Solutions*

Kathleen.McTavish@iqvia.com



**Kari Miller**

*Director, QMS Regulatory and Product Management*

Kari.Miller@iqvia.com