scribemanager

User's Manual (Solo Transcriber's Version)

SCRIBEMANAGER

2009
From Tyger Valley Systems

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Introduction

Thank you for your interest in ScribeManager, a sophisticated workflow system for transcription entities.

We're Tyger Valley Systems, and we provide many types of products and services to transcription firms. To learn more about us, please see the last couple of pages of this manual.

At Tyger Valley Systems we know that all transcription companies are different, and therefore we don't expect one workflow solution to suit everyone perfectly. For that reason, although you're welcome to use the "standard" version of ScribeManager at www.ScribeManager.com, most of our clients do not use that version – they have asked us to provide them with bespoke versions of ScribeManager that fit their working methods more precisely. We encourage you to discuss this with us.

All references in this manual to "ScribeManager" mean the STANDARD version of ScribeManager, not bespoke versions that have been configured for particular clients.

This manual is for solo transcribers, i.e. those who work for themselves rather than for a company, and who have no assistants. If that description does not fit you, please download the appropriate manual for your needs from this web page: http://www.scribemanager.com/manuals.html

ScribeManager is a back-office workflow system for large and small transcription companies. It automates many of the time-consuming and repetitive tasks associated with running a transcription company. Automation means lower costs and less likelihood of human error.

ScribeManager helps you in other ways, for example by backing up your data, providing your clients with convenient upload tools, automatically converting many incoming files to the mp3 format, enabling you to invoice your clients in just a few clicks, and enabling your clients to download their sound files and transcripts from you, to name just a few.

ScribeManager caters for a wide variety of tasks, and you are unlikely to need all its features. Because of its versatility, it is not intuitive, and you will not be able to learn it properly by trial and error. For that reason it is important that you refer to this manual to realize the full benefits of ScribeManager.

This manual is designed to be straightforward to follow, but if you nonetheless have questions, or if you would like us to talk you through setting up your ScribeManager account, please email us via the contact page of our web site, www.ScribeManager.com.

Notes

Please note the following points:

- your first full calendar month of ScribeManager use is free. For example, if you set up your account on January 15th, the remainder of January plus all of February will be free, and you will only be liable for charges from 1st March. However, we will only ever levy charges if you actively confirm to us that you wish to become a paid user.
- for security reasons, even we do not know your login password. If you forget your password, click “forgot your login?” on the home page, www.ScribeManager.com.
- for security reasons, you cannot log in to more than one ScribeManager account at a time on the same computer in the same browser.
- if at any time ScribeManager functions differently from what is described in your manual, please check for a newer version of the manual. Please note again that this manual applies to the STANDARD version of ScribeManager, not to any bespoke versions configured for particular clients.
- since the great majority of typists are female, this manual uses the conventions “she” and her” in reference to typists, solely in order to avoid repetitive use of the linguistically cumbersome “he or she” and “his or her”.

What exactly does ScribeManager do?

ScribeManager enables you to conveniently manage a transcription operation of any size, and automate it to a high degree while saving costs. Here is a very brief chronological description of how you might work with ScribeManager.

- Firstly, your client uploads files to your ScribeManager account via a URL that ScribeManager provides for you.
- Next, ScribeManager automatically creates a job for that client in your ScribeManager account, and for most file types automatically displays the length of those files, their deadline, and any other information relevant to that client's work.
- ScribeManager automatically converts most file types to mp3, giving you the option to work with the original file or the mp3 version.
- When a job is complete, you can produce one or all of your invoices in just a few clicks, and they can optionally all be sent to your clients automatically.

If you prefer to invoice your clients before sending transcripts to them, please contact us.

Your clients can log in to their own page of ScribeManager and see the progress of their jobs, download their own sound files (either the originals or the mp3 versions), and also download their transcripts.

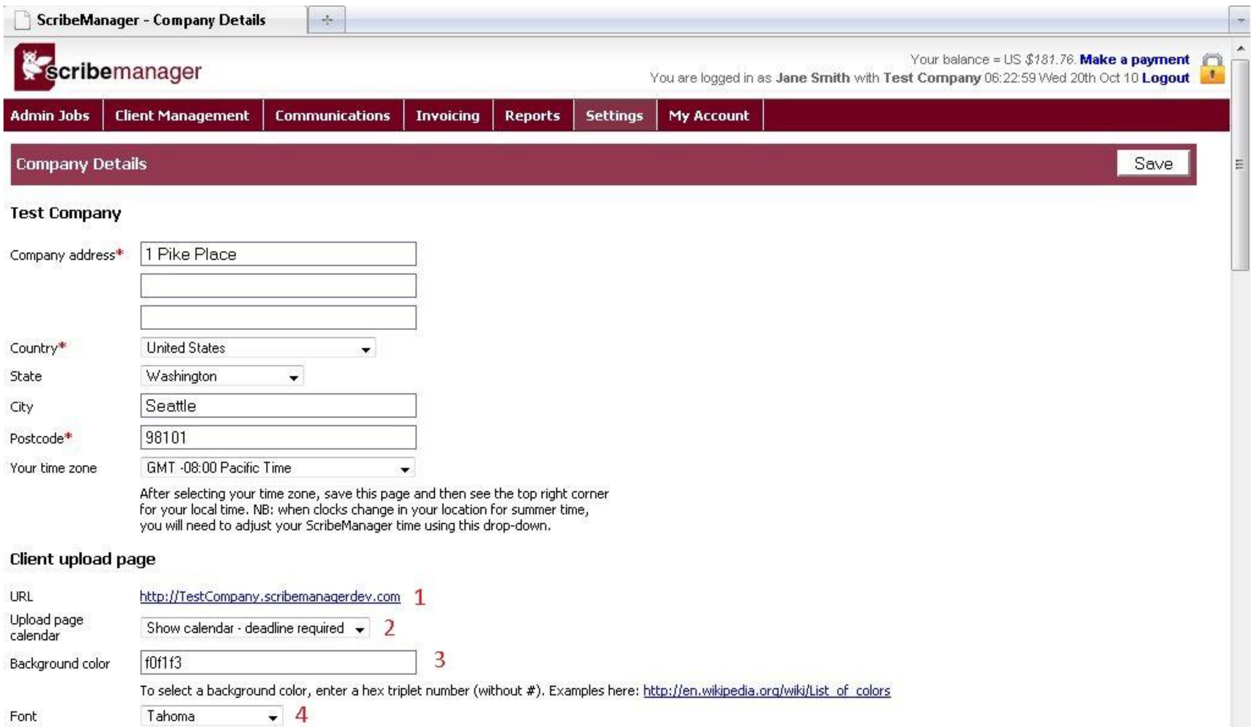
The above is just a brief overview. The only way to understand all the benefits of ScribeManager is to try it for yourself, which you can do for free!

When you are ready to try ScribeManager for yourself, please sign up for a free trial at www.scribemanager.com, if you have not already done so, and follow the instructions, then continue to read this manual.

Getting Set Up (the Company Details page)

The first time you use ScribeManager, you need to configure it to your working methods. To do this, go to www.scribemanager.com and log in, then go to Settings, Company Details, then fill in the page as appropriate for you. Guidelines below.

Company Details page (top part)



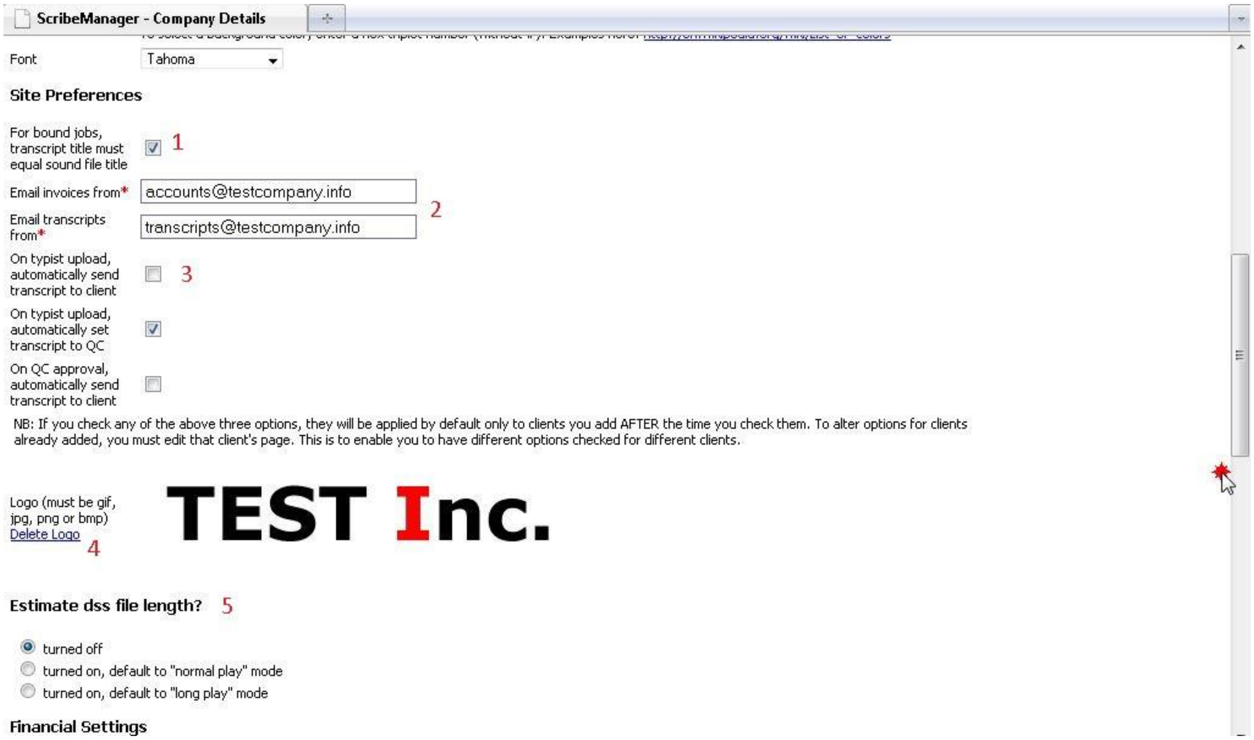
1 – this is the URL your clients must go to when uploading files to you. You can either tell them this URL or link to it from your web site.

2 – here you can decide whether you want to force your clients to set a deadline for the work when they upload it, or make it optional for them to do so, or not show them the deadline calendar at all. If your clients set a deadline using the deadline calendar, that deadline automatically appears in your ScribeManager account for that job, which saves you having to set the deadline yourself.

3 – choose a background color for the upload pages, e.g. the color used for your web site.

4 – choose a font for the text on your upload pages, e.g. the font used on your web site.

Company Details page (middle part)



1 - if you check this box, for most jobs ScribeManager will only allow your typists to upload transcripts if they match the name of the corresponding sound file. This helps to avoid the embarrassment of mistitled transcripts reaching clients. For example, if the sound file is titled “Interview with John Smith.mp3”, ScribeManager will accept “Interview with John Smith.doc” or “Interview with John Smith.txt”, etc, but not “Interview with Jhon Smith.doc” or “John Smith Interview.doc”, etc.

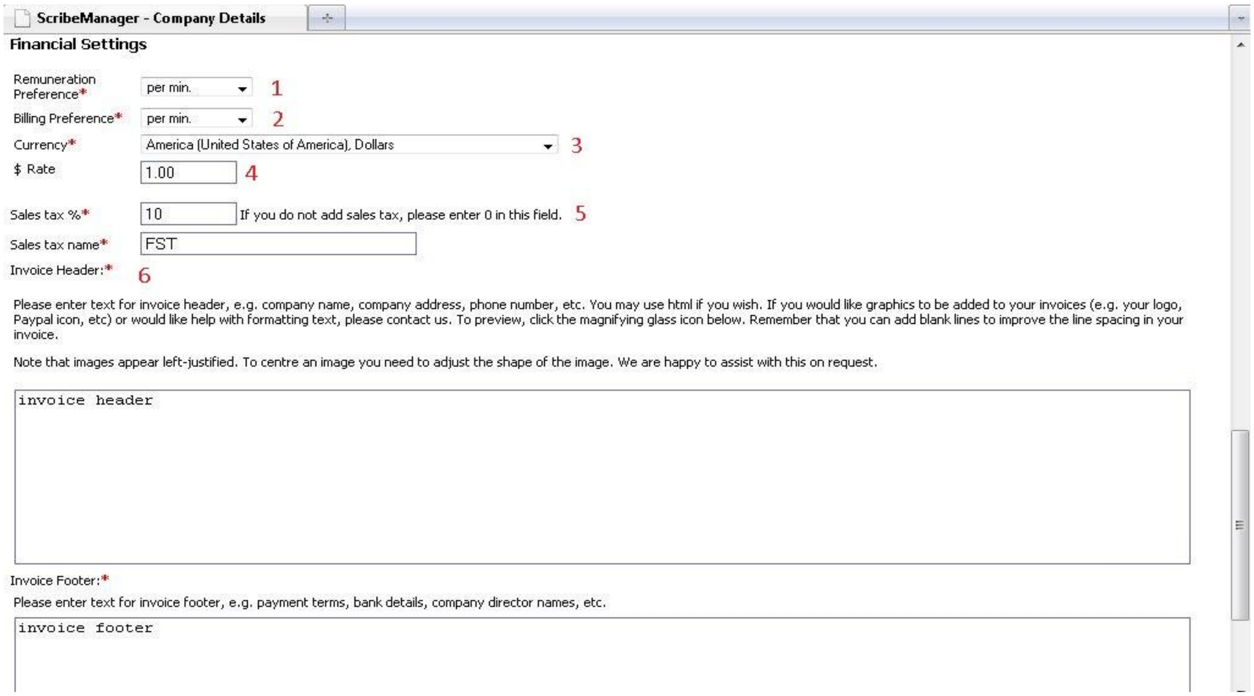
2 – here, type the email addresses you want to use to send invoices and transcripts to your clients. You may for example want to send invoices from an accounts email address, so that if your client replies, their email goes directly to your accounts person.

3 – these options are ways of automating some of ScribeManager’s functions. Please leave them unchecked for now.

4 - if you add a logo, your clients will see it on the upload pages when sending files to you.

5 – ScribeManager will display the length of many file formats uploaded to you, but for dss files it can only give an estimate based on file size. Your setting here will be used as the default for all clients that you add, but you can override it for individual clients and jobs.

Company Details page (bottom part)



1 – this is where you select the method of typist remuneration.

2 – here, select the method you normally use to bill your clients. You can change it for individual clients or jobs later.

3 - here, select the currency you normally use to bill your clients. You can change it for individual clients or jobs later.

4 – if you always or usually bill your clients the same rate, enter that rate here, and it will be used as the default for all clients you add later. If the rates you bill your clients usually vary, it is best to leave this field blank. If you do enter a figure here, you can override it for individual clients and jobs later.

5 – here, enter the name of the sales tax in your jurisdiction. Then add the % rate of that tax, so it can be calculated for your invoices. If you do not add sales tax, enter a rate of zero here.

6 - type here the text you want at the top of your invoices (it will appear centered on your invoices), then in the next box add the text for your invoice footer (it will appear left-justified). You can use html code to format text, e.g. bold, underline, text color, etc. At the foot of the page, click the magnifying glass to preview your invoice. Remember, to improve the layout you can also add blank lines if you wish.

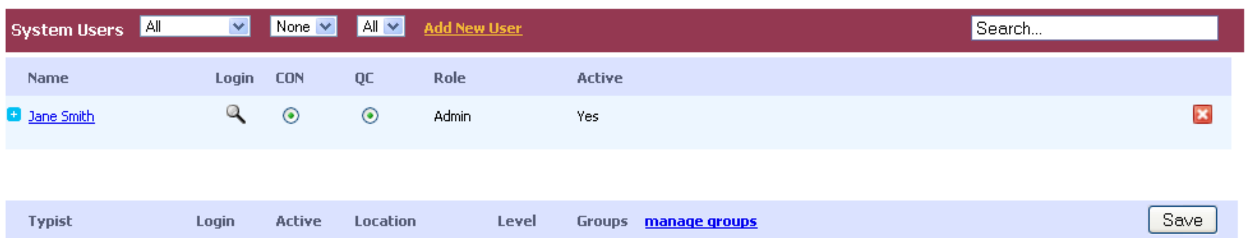
Now please see the next chapter, “Adding Users”. Even if you work as a solo typist and are already on ScribeManager as an administrator, you must still add yourself as a typist.

Adding Users

We will now add some typists to your ScribeManager account.

(As we go along, do not worry about features you see on ScribeManager that are not explained. We will examine basic features first, then move later to the more advanced ones.)

Go to Settings, System Users. This page is a list of all the users who have logins in your ScribeManager account, which at present should be only one.



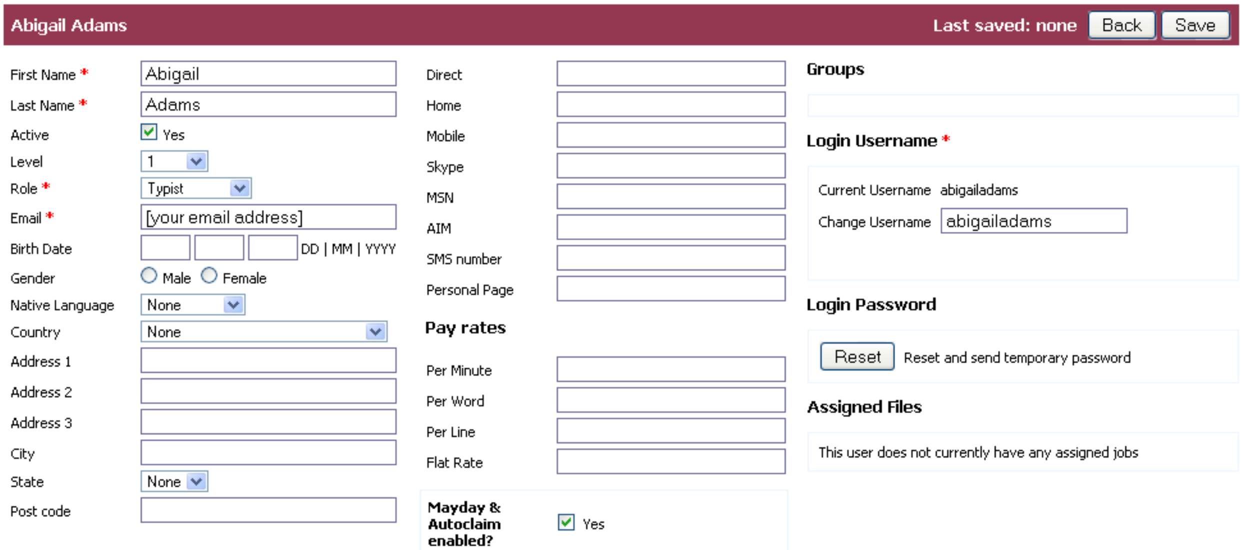
You should see yourself here already in the role of admin. A selection in the CON column means you are the controller of the account. A selection in the QC column means you are the QC person, and QC-related emails will come to you.

Click Add New User, and we will fill in the details of an imaginary typist

<u>Instructions</u>

For clarity's sake, enter a made-up first name and last name that both begin with the letter A; select level 1; select the role of typist; use your email address; think of a memorable username, e.g. the typist's first and last names; then click "Save and send login info to user". You should receive an email confirming your password as the typist; you can ignore this email for now.

You should now see something like this:



Now go to Settings, System Users, and again click Add New User, and add a second typist. Enter a made-up first name and last name that both begin with the letter B; select level 2; select the role of typist; use your email address; think of a memorable username, e.g. the typist's first and last names; then click "Save and send login info to user". Again, you should receive an email confirming your password as the typist.

Now add a third typist. Enter a made-up first name and last name that both begin with the letter C; select level 3; select the role of typist; use your email address; think of a memorable username, e.g. the typist's first and last names; then click "Save and send login info to user". As before you should receive an email confirming your password as the typist.

You have now added three typists of different levels, and on the System Users page you should see something like this:

You can quickly log in as another user by clicking on the magnifying glass beside their name.

We are nearly ready to test ScribeManager with a real job, but first we need to add a client.

Adding A Client

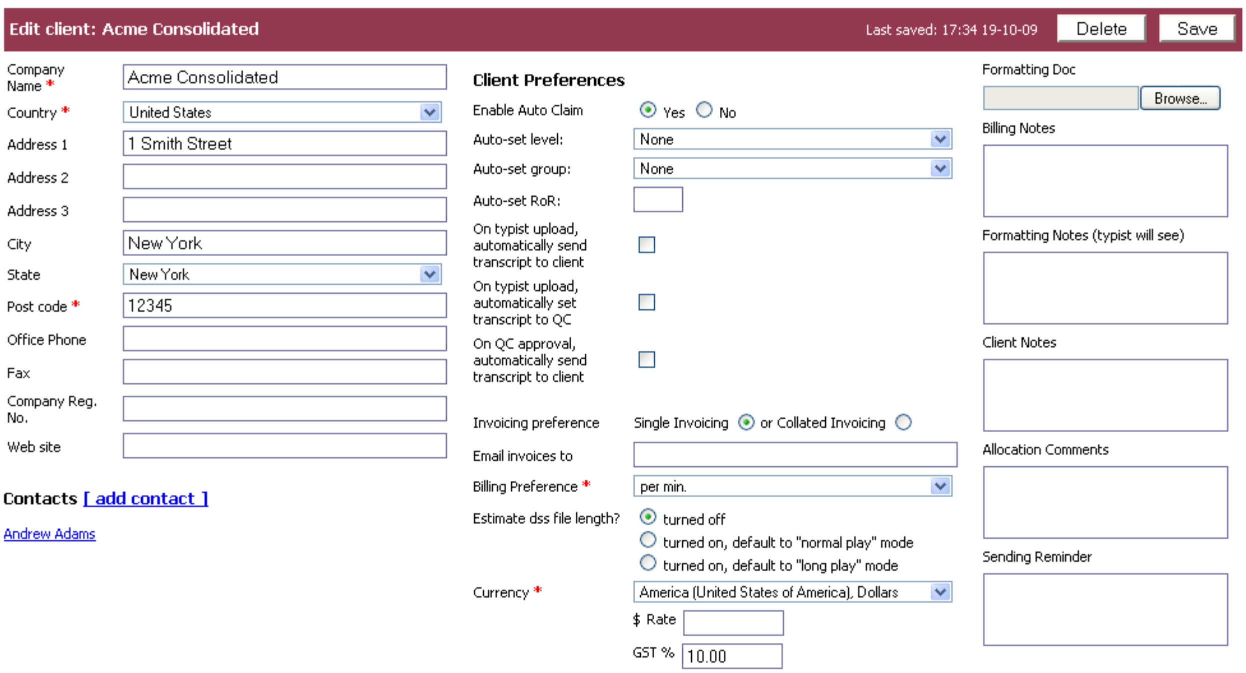
Clients can upload files to you even if they have not been added to your system, but it is better to add them beforehand if possible.

Go to Client Management, Add New Client.

Instructions

Enter a made-up company name that begins with A; enter a made-up address; set a billing preference of "per min."; set the currency as US dollars; under that, set the Rate as 1. In the bottom left, under First Contact, we need to add a contact person at the company. (ScribeManager allows you to add multiple contact persons at the same company, but there must always be at least one.) Enter made-up first and last names that begin with A, and add your email address. Then click Save in the top right.

You should now see something like this:



We can now process an actual job in ScribeManager. Although it is possible to automate most of the steps, we will first process a job manually so that you can understand the different stages of the workflow process.

NB: if you want to add a large number of clients to your ScribeManager account, rather than doing so manually please contact us for assistance, and we will import them for you.

Adding Jobs to ScribeManager

There are two ways to add jobs to ScribeManager:

1 - your client (or you, on your client's behalf) can upload files directly into your ScribeManager account via the URL you saw on the Company Details page. This has the effect of creating a job in your ScribeManager account with all the uploaded files ready to hand.

2 - you can do so yourself by going to Admin Jobs, Add New Job.

Of these two methods, the first is more common, and usually more convenient because the job and the sound files are added at the same time. (With the second method, you have to add the job and then add the sound files separately.)

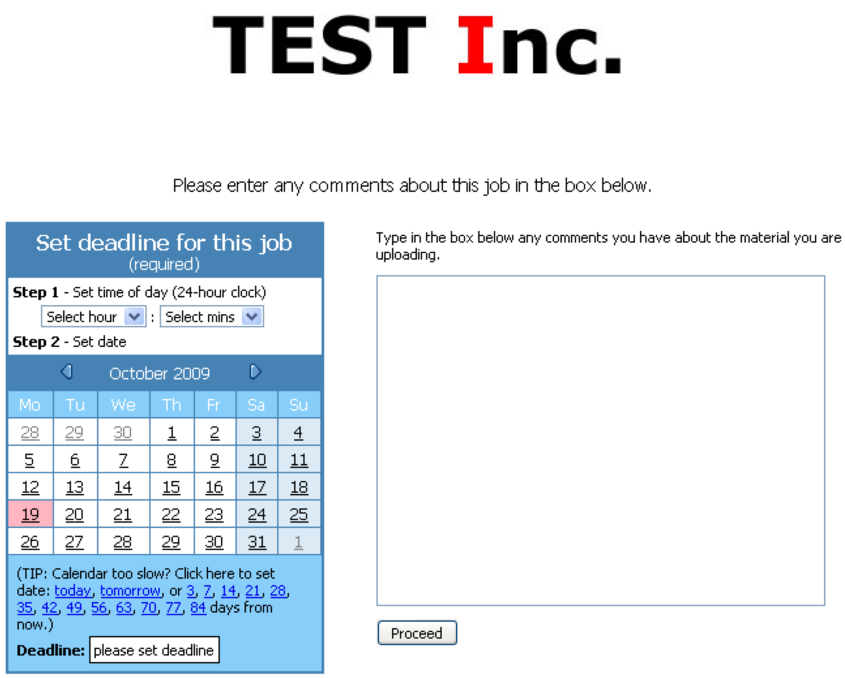
We will now add a job using the first method, i.e. as if we were a client. Please have ready, 1, the upload URL from your Company Details page; 2, the email address of the client contact person you just added; and, 3, a sound file to upload. In this example we will use an mp3 called "Test File.mp3"; you may like to take an mp3 file and rename it as that, so as to more easily follow the instructions.

Firstly, log out of ScribeManager in order to prevent login conflicts. Then go to the client upload URL. You should see something like this:

This is the page your clients will use to upload files to you. If you added a logo earlier, you will see it here. Later you will learn how to configure the messages and colors on this page.

Enter the email address of the client contact you added earlier and click "Proceed to upload".

You should now see something like this:

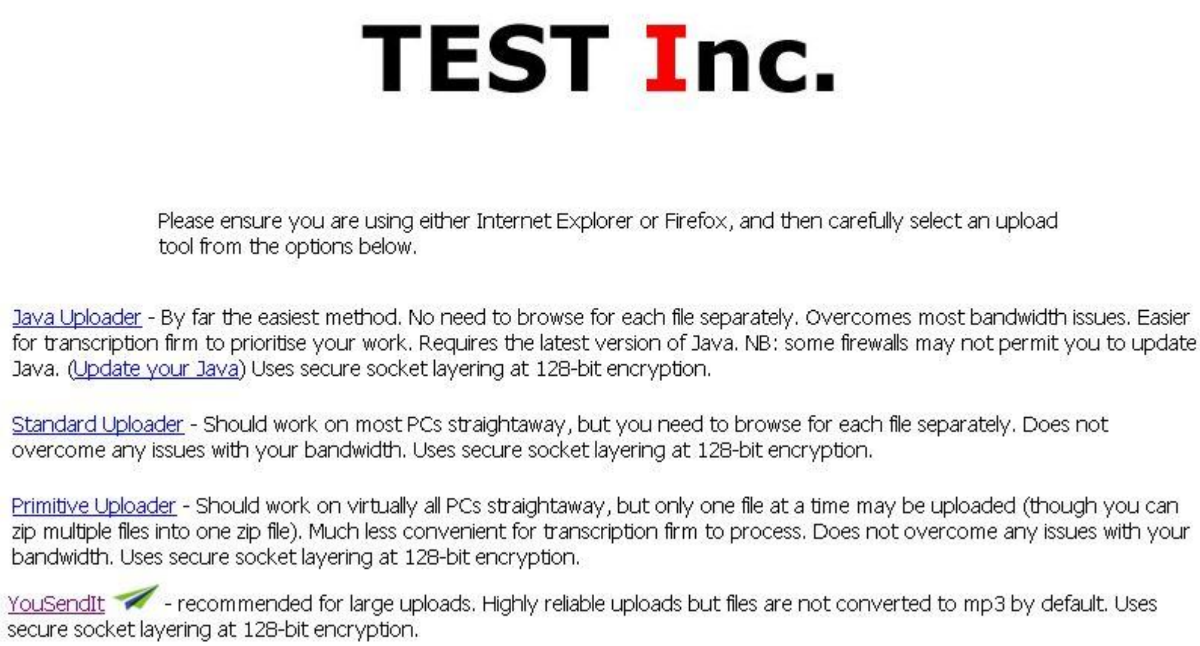


If on the Company Details page you opted to hide the deadline calendar, it will not be visible.

If it is visible, you may like to set a deadline, just as a test.

In the Comments box, please type some comments, e.g. "Please transcribe verbatim". Then click Proceed.

You should now see something like this:



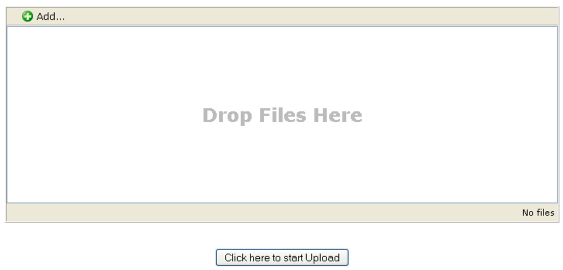
(If you do not see the YouSendIt option, you may contact us at any time to activate it for you.)

This page offers the client a choice of upload tools to use when sending files to you. Because of the wide variety of browsers and network security configurations, no upload tool works for everyone. The choice of upload tool is a trade-off between, on the one hand, better features, and, on the other hand, wider compatibility. See also the chapter “Uploads”.

We recommend you encourage your clients to use the Java Uploader. Although they may need to update their Java first, they will find this tool much easier to work with, and their uploads should work more reliably.

The first three uploads tools all work in more or less the same way (YouSendIt will be explained later – please do not use it for now). This chapter of the manual assumes you are using the Java Uploader.

Click Java Uploader (if you get an error message, update your Java). You should see this:



To add your file for upload, you can either click “Add” and browse for it, or, far more conveniently, you can just select it in Windows Explorer and drag it to the white window.

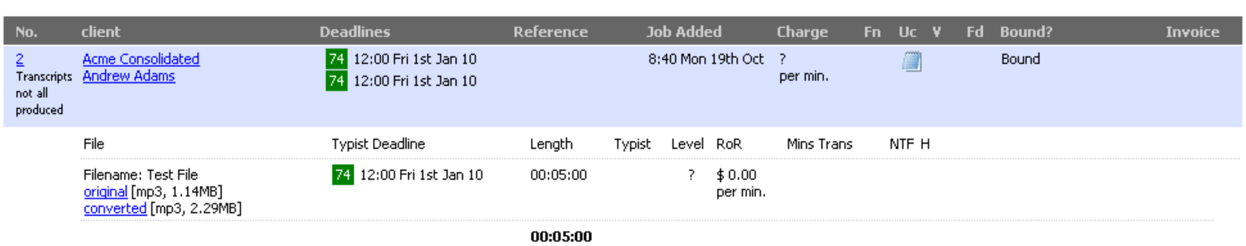
After adding the file, click on “Click here to start Upload”. The file should begin uploading.

If you experience difficulties with uploading, try the Standard or Primitive Uploaders, or contact us for support.

Allocating a job

When the file has uploaded, close down that browser, log back in to your ScribeManager account, and go to Admin Jobs, Jobs List.

You should see something like this:

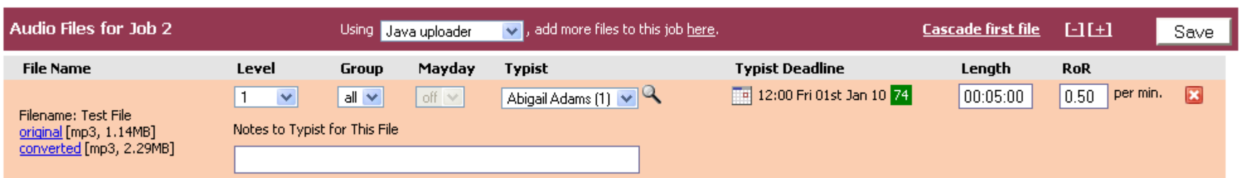


The job details are in the blue band, and the sound file details are in the white band. If there are some things on the screen that are not clear to you, do not worry at this point.

We will now allocate this job to a typist.

Click on the job number in the top left, and you will be taken to the "Edit job" page, which contains all the details of the job. Find "Rate" in the middle of the page, and set that to 1 (that is the rate you will charge the client). Then go to the bottom of that page and you will see the sound file you uploaded. Set the level to 1, and on the "Typist" drop-down menu, allocate the sound file to the first typist. In the bottom right-hand corner, you will see "RoR" – this is the rate of remuneration you will pay to the typist for this job. Set it to 0.50. Then click Save.

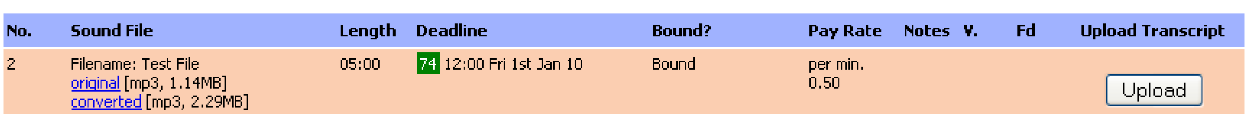
The bottom part of the page should now look something like this:



If the background to your file is white rather than peach, this is probably because you have not set a deadline. Don't worry about this now – background colors will be explained later.

The file is now allocated to the typist. For the next stage of the procedure, we will now log in as the typist.

Typists can of course log in to their own version of ScribeManager via the home page, but if you are the administrator there is a quicker way to log in as a typist. Go to Settings, System Users, and click on the magnifying glass beside the relevant typist's name. A new browser window will open, and you will be asked for that typist's password. That password will have been emailed to you when you added the first typist using your email address. Enter that password now, and then set a more permanent password. Then click Typist Jobs. You are now logged in as the typist, and you should see what the typist sees when they log in, i.e. something like this:



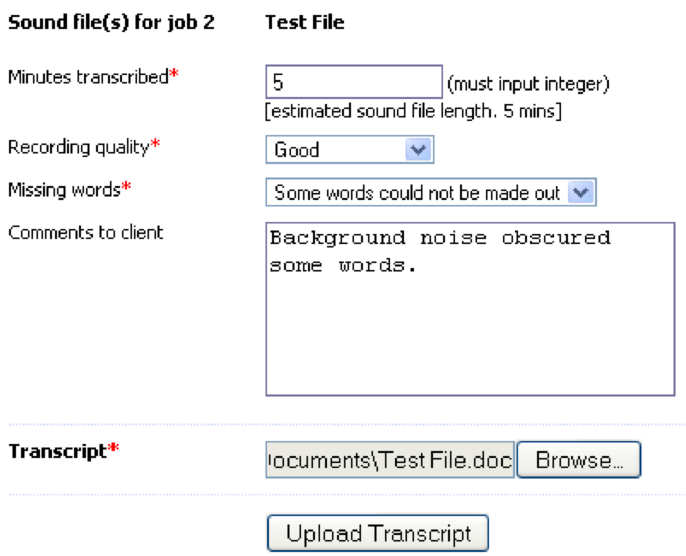
You will notice that certain confidential job information is hidden from the typist, e.g. the identity of the client.

The typist can download the sound file to transcribe it, either by clicking on "original", which downloads the same file that the client originally uploaded, or by clicking on "converted" (if available), which downloads the mp3 version that ScribeManager created – this is normally smaller than the original file.

Uploading finished transcripts

Now create a dummy transcript for upload, titled as per the sound file, e.g. Test File.doc

Click on Upload, and fill in the page with sample data. You should see something like this:


Sound file(s) for job 2 **Test File**

Minutes transcribed* 5 (must input integer) [estimated sound file length. 5 mins]

Recording quality* Good

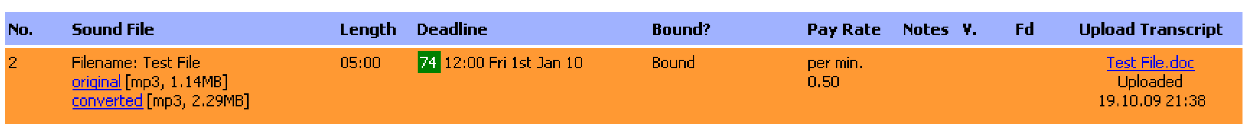
Missing words* Some words could not be made out

Comments to client Background noise obscured some words.

Transcript* ıocuments\Test File.doc Browse...

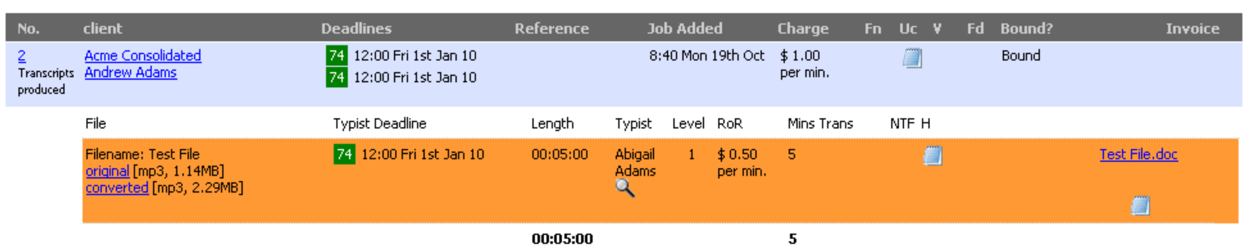
Upload Transcript

Click Upload Transcript. The transcript will upload, and you will be taken back to the typist's jobs page, where you should see something like this:



No.	Sound File	Length	Deadline	Bound?	Pay Rate	Notes	¥.	Fd	Upload Transcript
2	Filename: Test File original [mp3, 1.14MB] converted [mp3, 2.29MB]	05:00	74 12:00 Fri 1st Jan 10	Bound	per min. 0.50				Test File.doc Uploaded 19.10.09 21:38

You can now close down this browser, and return to admin's Jobs List page, where you should see something like this:



No.	client	Deadlines	Reference	Job Added	Charge	Fn	Uc	¥	Fd	Bound?	Invoice
2 Transcripts produced	Acme Consolidated Andrew Adams	74 12:00 Fri 1st Jan 10 74 12:00 Fri 1st Jan 10		8:40 Mon 19th Oct	$ 1.00 per min.					Bound	

File	Typist Deadline	Length	Typist	Level	RoR	Mins Trans	NTF	H	
Filename: Test File original [mp3, 1.14MB] converted [mp3, 2.29MB]	74 12:00 Fri 1st Jan 10	00:05:00	Abigail Adams	1	$ 0.50 per min.	5			Test File.doc
		00:05:00				5			

You may by now have guessed that the point of different background colors is so that all users can quickly see the status of jobs. More about this later.

The transcript has been uploaded by the typist, and has been emailed to admin's email address. It has not yet been sent to the client, because admin may want to check it first.

Assuming that you were happy with the transcript, at this point you would send it to the client.

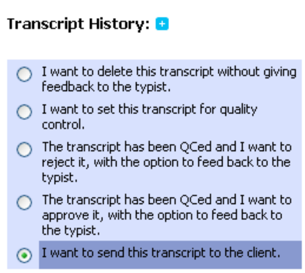
Sending transcripts to clients

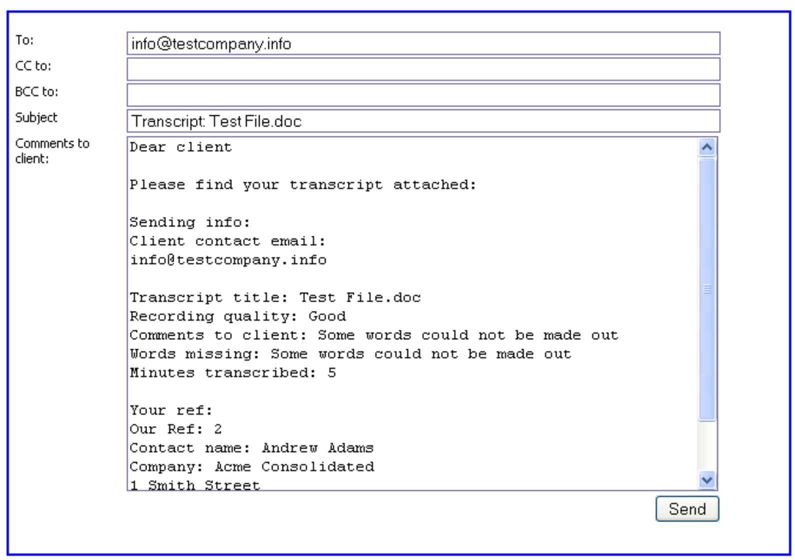
You may have noticed that the transcript has arrived to admin by email (we can turn this email off at your request). To get the transcript to the client, you could simply forward them that email, but if you do, ScribeManager will have no record that the client was sent the transcript. It is better to send the transcript from within ScribeManager. (Note that with ScribeManager, everything happens within the Internet browser. This means that if your computer ever breaks down, or you lose your access to the Internet, all is not lost – you simply move to another computer (e.g. at an Internet café), then log in to ScribeManager and pick up where you left off.)

You can also let your client download the transcript (details later), but if you email it to them from within ScribeManager, ScribeManager then has a complete record of the workflow for that file.

To email the transcript to the client from within ScribeManager, go to the Jobs List page and click the transcript name, and you will be taken to the Manage Transcript page, where you can see all the details of the job, enabling you to do a last check before sending to the client.

Go to the foot of that page and click "I want to send this transcript to the client." You should now see something like this:



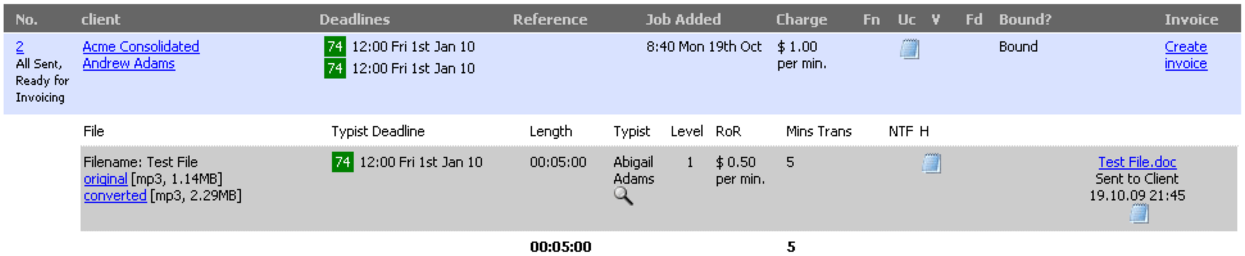


Here you can edit the email that will go to the client. When you are ready, click Send, and the email will be sent with the transcript attached. You should receive it in your email, assuming you used your email address for the client.

You should now be back on the Jobs List page. The job is no longer visible on default view, because the default is to show only unfinished jobs. But we still need this job, because we have to invoice it. To find it, go to the drop-down menu beside the word "Show" and select "All transcripts sent to client, job ready for invoicing". This means exactly what it says – that jobs whose transcripts have all been sent to the client will be displayed.

The reason for having different filters on this page is to prevent you from having to look at irrelevant jobs. For example, if your role in the company is to allocate jobs, you will not want to have to look at finished jobs; similarly, if your role in the company is to do the invoicing, you will not want to have to look at unfinished jobs that are not ready to be invoiced.

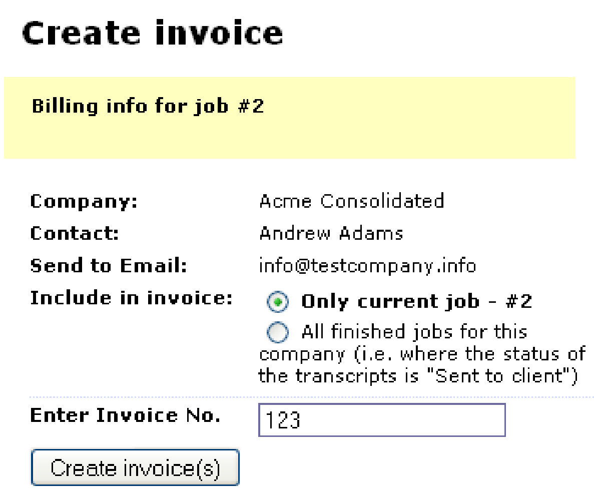
You should now see something like this:



Basic invoicing

We will now invoice the client for this job. (Note that the standard version of ScribeManager assumes that you invoice the client after the job is complete. If you usually invoice clients before starting work, please contact us.)

Click on “Create invoice”. Enter an invoice number, e.g. 123. You should now see something like this:



Click “Create invoice(s)”. You should now see something like this:

Your invoice is ready

Invoice No.	Job #	Company	Contact	Send to Email	Total	View
123	2	Acme Consolidated	Andrew Adams	info@testcompany.info	5.50	

Please now download the invoice to your PC for storage, and then straightaway use this page to send it to your client as well.

NB: ScribeManager can send the invoice to your client now, but it does not store your invoice after you leave this page, so you should download it for storage.

NB: if you do not use this page to send the invoice to your client, ScribeManager will re-present this job for invoicing again later.

- download the invoice
- email the invoice(s) to the client. The email will be copied to accounts@testcompany.info

Proceed

You can preview the invoice by clicking on the magnifying glass icon. If you wish to alter the invoice header or footer, you can do so by going to Settings, Company Details again.

Note that ScribeManager does not store your invoice, so for your accounts records you will probably want to download it to your PC, which you do by selecting “download the invoice” and clicking Proceed. When you have it safely on your hard drive, email it to the client, by selecting “Email the invoice to the client” and clicking Proceed.

You will see a message saying the invoice has been sent, and you should receive the invoice in your email, assuming you used your email address for the client.

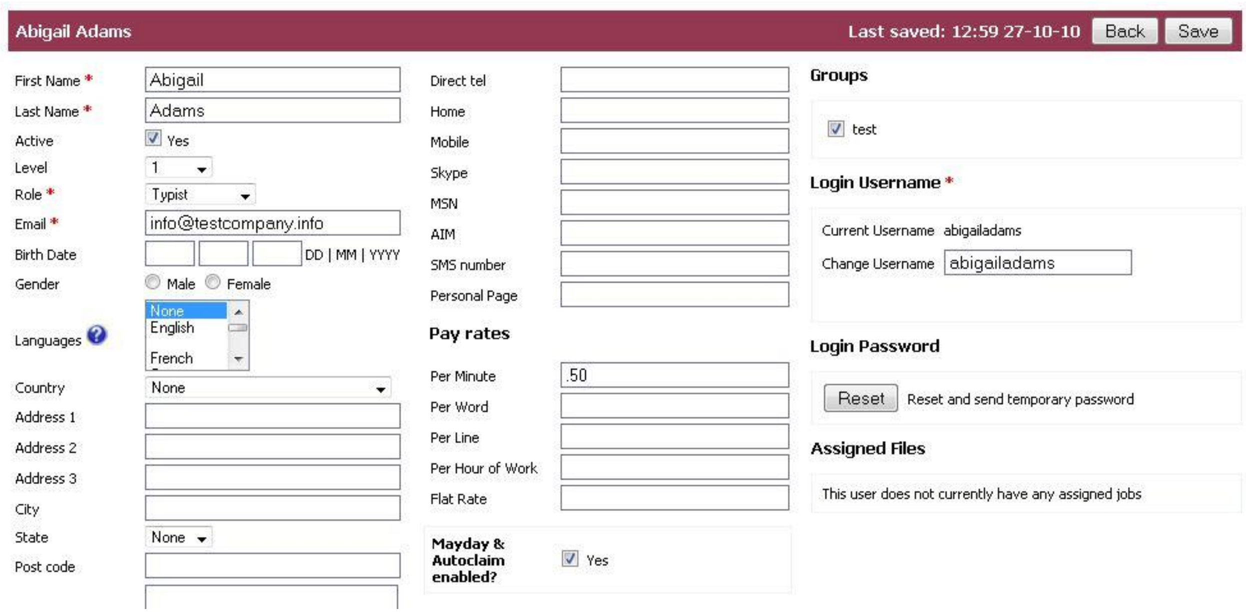
Congratulations - you have just processed a basic job in ScribeManager. It is possible to automate the process far more than what you have just seen, but it was important that you first see a job going the long way around, through all its different stages.

If anything did not work for you as described in this manual, now is a good point to contact us for help.

You have so far only seen ScribeManager’s most basic features. We will now move on to some fuller explanations, and demonstrate its more powerful tools, which have the potential to save you considerable time and cut your operating costs. To take just one example, with the same number of clicks that it took you to create just *one* invoice above, you can create *all* your invoices – a huge time-saver.

Setting typist remuneration automatically

It is possible with ScribeManager to automatically set a rate of remuneration (RoR) for a particular typist. Go to Settings, System Users, and then click on a typist.



Under "Pay rates" are five remuneration boxes where you can fill in rates of remuneration for this typist according to the five different methods ScribeManager supports. For example, if the rate of remuneration to this typist is always 0.50 per minute, enter that figure in the "Per Minute" box.   Then, whenever you allocate manually to this typist on the Edit Job page, this figure will appear. When it does, you can still override it if you wish.

Note that this feature only works if you allocate the sound file *manually*. If the typist claims the file via auto-claim or Mayday (see chapters "Auto-Claim" and "Mayday"), their rate of remuneration will be whatever was already set for that file.

You can add figures in more than one of the five boxes. ScribeManager will use whichever figure corresponds to the job's Remuneration Preference setting, e.g. if the Remuneration Preference is set to "Per Hour", the figure in the "Per Hour" box will be used.

Background Colors

ScribeManager uses different background colors for sound files depending on their status. This page is to be used purely as a reference for those colors. Full explanations will be provided in the appropriate chapters.

COLOR	MEANING	EXPLANATION	LOOK FOR THIS COLOR IF…
white	UNPREPARED	Sound file is missing data, i.e. level, length, deadline, RoR	…it is your job to prepare files for allocation.
blue	PREPARED	Sound file is ready to be allocated	…it is your job to allocate files.
peach	ALLOCATED	Sound file has been allocated	…it is your job to make sure files are allocated.
orange	UPLOADED	The transcript has been uploaded.	…it is your job to decide whether to send the transcript on to the client OR set it to QC.
brown	UNDER QC	The transcript has been set to QC.	…it is your job to do QC.
red	REJECTED	The QC person has rejected the transcript.	…it is your job to ensure the typist reworks the transcript.
pink	APPROVED	The QC person has approved the transcript.	…it is your job to send the transcript on to the client.
green	AUTO-CLAIM	The sound file is waiting to be claimed by a typist.	…it is your job to allocate. If no typist claims, you may need to allocate manually.

yellow	MAYDAY	The sound file is urgent, and is waiting to be claimed by a typist.	...it is your job to allocate. If no typist claims, you may urgently need to allocate manually.
grey	SENT TO CLIENT	The transcript has been sent to the client.	...it is your job to create invoices for clients.
purple	UNBOUND	The requirement is NOT one transcript per sound file.	See chapter "Unbound". Unbound jobs to be used with caution.

Typist Groups

ScribeManager's Typist Group facility enables you to put your typists into groups for convenient management and greater automation. For example, if you have 10 typists, you could do the following:

- create a typist group called "night shift" and put 4 typists into it
- create a typist group called "US based" and put 8 typists into it
- create a typist group called "medical" and put 7 typists into it

A typist can of course be in more than one group.

Whether you create typist groups or not, all typists will all still be in a group called "All" that cannot be deleted.

To create or edit groups, go to Settings, System Users and click "manage groups".

The typist group facility can be used to assist and automate your allocation process. For example, you may want to ensure that a particular client's work is always done by a certain group of typists, perhaps those in the same geographical location as the client, as they will be more familiar with the accents in the recording. To enable this, you can set a client to a particular group by going to Client Management, Clients, selecting the client, and then choosing a group on the "auto-set group" dropdown.

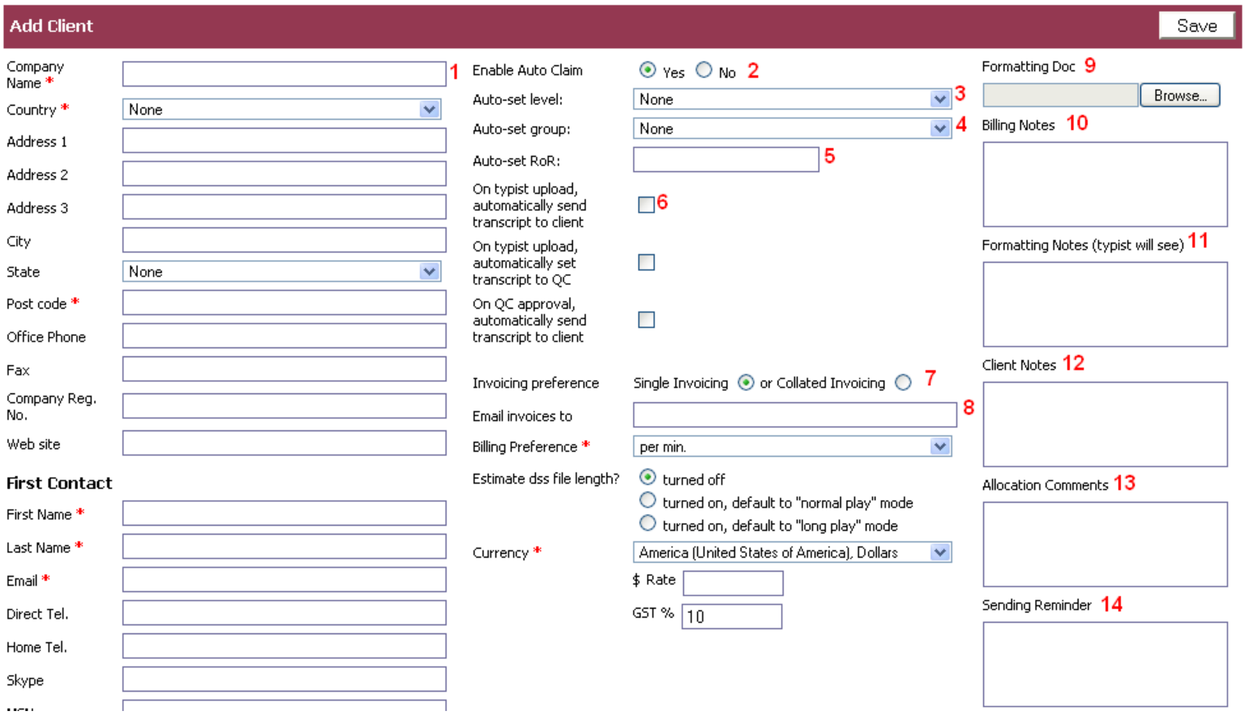
If you associate a client with a group in this way, whenever that client adds a job only the chosen group of typists will be shown as available.

You can however override this group selection for individual jobs if you wish.

The Add Client page

Click Client Management, Add Client.

The data you input on this page will be saved as the default for that client, and will appear whenever a new job for this client is added (although you can change it for individual jobs).



Below are explanations of the functions of fields on this page.

1 – Enter the client's details carefully, because they will appear on your invoices to the client.

2 – Auto-claim is a feature that enables suitable typists to claim work for themselves without you having to allocate it to them. See the chapter "Auto-claim".

3 – If this client always uploads files of the same level of difficulty, set that level here (5 = most difficult), so that all files they add will be automatically set to that level when uploaded.

4 – If you want this client's work to be done only by typists in a particular group you have created, select that group here.

5 – If you want to pay your typists the same rate of remuneration for all this client's work, set that rate here and it will appear by default for all this client's jobs.

6 – These options enable powerful automation features in ScribeManager. See the chapter "Automation".

7 – If this client wants to receive one invoice per job, select Single Invoicing. If they want to receive one invoice containing multiple jobs (e.g. monthly invoices), select Collated Invoicing.

8 – By default, invoices are emailed to the individual client who uploaded the work. If the client wants them to be emailed somewhere else, e.g. their accounts person, enter the email address here. You can enter multiple email addresses in this box, separated by commas.

9 – If you upload a document here, it will appear to all typists who do this client's work. You can use this to provide templates, vocab lists, etc. You can upload any file type including a zip.

10 – If you add text here, it will be displayed to you when ScribeManager is producing this client's invoices. You can use it to remind you of the client's invoicing requirements, e.g. "post hard copy".

11 – If you add text in this field (e.g. "Always use font size 12"), it will appear to all typists doing this client's work.

12 – Add here any general notes about this client (e.g. "Always obtain a purchase order before beginning work"). They will appear on the Edit Job page.

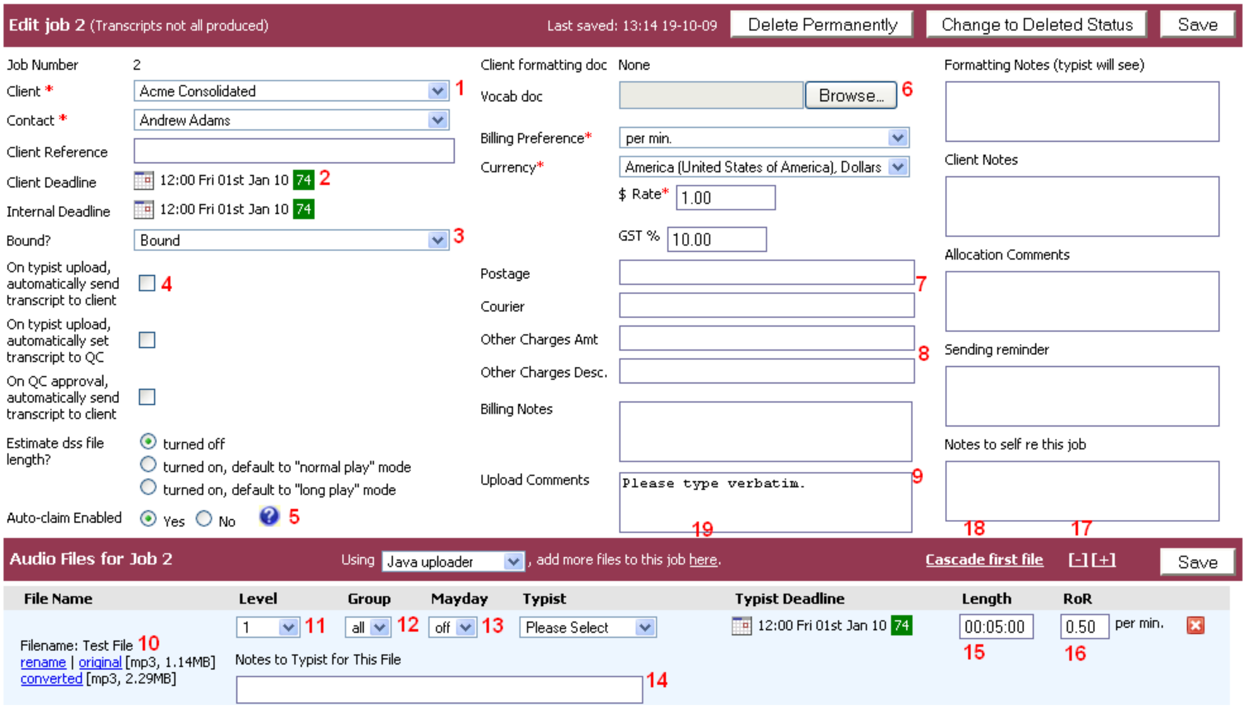
13 - Add here any notes about the allocation requirements of this client (e.g. "allocate to more experienced typists"). They will appear on the Edit Job page, where allocation is done.

14 - Add here any notes about this client's requirements re sending their transcripts to them (e.g. "telephone client when sending transcript to them"). These notes will appear on the Manage Transcript page when you are sending a transcript to the client.

The Edit Job page

Click Admin Jobs, Jobs List, and then click on the number of the job you want to edit.

The Edit Job page is where you edit all aspects of a job, and allocate files to typists.



1 – This is the client for this job. If you change to a new client, the new client's default information will appear in all other fields on this page.

2 – You can set a client deadline, and also a company-internal deadline (which cannot be later than the client deadline), and also, beside each sound file, a typist deadline (which cannot be later than the internal deadline). Typist deadlines can be different for different sound files.

3 – Most jobs are "bound", which means that the typist/s must produce one transcript per sound file. Anything else, e.g. two sound files requiring only one transcript to cover both, is called "unbound". Working with unbound jobs is advisable only for experienced users of ScribeManager. See the chapter "Unbound Jobs".

4 – These advanced features will be dealt with in the chapter "Automation".

5 – Here you can enable or disable auto-claim for this job. Enabling auto-claim means that suitable typists can claim files without you needing to allocate them. See the chapter "Auto-claim".

6 – Here you can upload a document that will appear to typists just for this one job, e.g. a vocabulary document.

7 – If you enter a figure for postage, it will appear on your invoice to the client for this job. The same applies for the "Courier" field.

8 – To add another type of charge to the invoice for this job, enter the amount and the description, e.g. "proof-reading" and "50". This will also appear on your invoice to the client for this job.

9 – In this box you will see the comments the client typed when uploading the job to you. Note that the typists do NOT see any comments in this field, because it is often inappropriate for typists to see unedited client comments. If you want the typist to see them, you need to copy them into the Formatting Notes field.

10 – Click on the "rename" link if you want to rename a file (for example if it contains a spelling error). Only available if the file is unallocated.

11 - Here you can set the level of difficulty for this file if you wish, if it is not set by default.

12 - Here you can set a group for this file if you wish, if it is not set by default. Note that the typist drop-down menu, a little to the right, will only show typists who are in the selected group. It will display them in this order: same level as the sound file, then those higher, then those lower.

13 – The Mayday feature can be used when a file needs to be allocated urgently. See the chapter "Mayday".

14 – Whereas the Client Formatting document and Vocab Doc will be seen by all typists transcribing files for this job, any text you type here will be seen just by the typist transcribing this one file.

15 – ScribeManager is in many cases able to insert file lengths automatically when files are uploaded, but when it does not, you can add or edit the file length here.

16 - Here you can add or edit the rate of remuneration you will pay to the typist who is transcribing this file.

17 – If you click "+" or "-", the RoR for all unallocated files will be raised or lowered by 1. IMPORTANT: Smart use of this feature may enable you to reduce your spend on typists by 10-20%. See the chapter "Using ScribeManager to Reduce Your Spend on Typists".

18 – If a client uploads multiple files that are of different lengths but otherwise similar, you can simply set the group, level, deadline and RoR for the first file, and then click "Cascade first file", and those parameters will be automatically copied to all the other files (except those which are already allocated).

19 – To add extra sound files to this job, use this feature. If you want to add not a sound file but a link to a file hosted elsewhere, on the drop-down menu select "URL adder". See the chapter "Adding URLs".

Quality Control

ScribeManager cannot itself do QC, but it can enable you to keep track easily of transcripts that are undergoing QC.

To set who the QC person is, go to System Users and check one of the boxes in the QC column. All QC emails will now go to that person. You can change that to a different person any time, e.g. if your company works in shifts.

To prevent the QC person from seeing clients' identities, go to their user page and set their role as QC Manager.

To set a newly-uploaded transcript to QC, go to that transcript's Manage Transcript page and instead of selecting "I want to send this transcript to the client", select "I want to set this transcript for quality control."

This transcript will now appear on the Jobs List page with a brown background, so that your QC person can find their jobs quickly.

The QC person checks the transcript, and then goes to the Manage Transcript page to either reject or approve it.

A rejected transcript goes red, and stays under QC, until is reuploaded at which point it again goes brown, until it is approved. An approved transcript goes pink.

ScribeManager informs typists by email when a transcript of theirs is set to QC, rejected or approved, and the QC person can add feedback to those emails. Typists are much more likely to produce quality work if they know it is being checked; and they are greatly motivated by appreciative comments when their documents are approved.

When a transcript is set to QC, an email notification is sent to the QC person and the typist.

When a transcript is rejected, an email notification is sent to CON and the typist.

When a transcript is approved, an email notification is sent to CON and the typist.

Bulk Invoicing

We have already seen one way to create an invoice, in the chapter "Basic Invoicing". Using that method you can create one single invoice, containing either just that one job or containing all finished jobs for that client.

However, ScribeManager has two more powerful invoicing tools which enable you to create a practically infinite number of invoices in just a few clicks.

In the chapter "The Add Client page", we saw how for any client we can select either Single Invoicing, to be used if the client wants one invoice per job, or Collated Invoicing, to be used if the client wants all their finished jobs grouped into one invoice (this is useful if the client has requested monthly invoices).

We can use these settings to create invoices for ALL clients in just a few clicks.

To create all the invoices for all clients who want Single Invoicing, go to Invoicing, Single Invoicing. You will be asked for the invoice number from which you want the invoices to be numbered. Normally for accounts purposes you will want your invoices to be numbered consecutively, so if the most recent invoice you produced was 123, you would enter 124. Click Create Invoice(s), and on the next page you will see all the invoices, one per finished job, numbered from 124 onwards. You can preview them if you wish. As per the instructions on that page, you should then download them and store them safely, and then immediately use the same page to send them to your clients.

Creating invoices for clients who want Collated Invoicing is exactly the same except that instead of seeing one invoice per finished job, you will see one invoice per client. Note that all contacts at the same company are grouped into the one invoice.

Your Clients' Access to ScribeManager

Your clients can log in to their own version of ScribeManager, though they do so not via the ScribeManager home page but via the same URL where they upload sound files to you.

When your clients have logged in, they can see the status of their jobs, download their transcripts when completed, and even download their sound files (original or converted).

The ability for your clients to log in can be very useful if for example they need a transcript to be resent urgently but cannot contact you. It should also save you from having to deal with repeated telephone enquiries from clients as to the status of their work, because they can log in to check the status for themselves. Moreover, it is widely considered more secure to receive transcripts by download than by email. If you would like your clients to obtain transcripts by download rather than email, contact ScribeManager support and we will ensure that transcript emails are sent to clients without attachments, in other words the emails function as notifications to clients that their work is ready for download.

To get login details, clients simply follow the links on the upload page: "click here to view your current jobs".

You can also log in quickly as a client, so that you can see what they see. Go to Client Management, Clients, select a client, select a contact, and then click on the magnifying glass.

Edit Messages

If you go to Settings, Edit Messages, you will see four text boxes. The first three contain the text that your clients see when uploading files to you. If you wish you can edit these messages so that they contain more information about your policies and processes.

The fourth box contains the text which is used for the body of the email when ScribeManager sends invoices to your clients. You may like to add text to this field that thanks the client for sending the work to you, or telling them whom to contact if they have a query about the invoice.

Search boxes

ScribeManager's search boxes require a word of explanation.

If there is no "Search" button beside the box, you simply type into it slowly, and results will appear in a drop-down. Note that ScribeManager does not search all fields, as that would be too slow or produce too many results.

The Jobs List page search box searches: job number, company name, client contact name, reference number, sound file names, transcript names

The Clients page search box searches: company name, client contact name, client contact email address

The System Users search box searches: user name, user email address

Automation

A great deal of automation is possible with ScribeManager. You can automate the entire transcription workflow process up until the point of invoicing, which is currently manual.

Automation has advantages and disadvantages. The obvious advantage is that the more automated your process is, the quicker, simpler and probably cheaper it is for you to run your company. The disadvantage of automation is that you lose a certain amount of hands-on supervision. For example, if you automate the setting of the level of difficulty of files, you will be unable to ensure that your more advanced typists transcribe the more difficult recordings. In some situations, care must be taken not to over-automate. Automation suits certain types of transcription and certain clients better than others.

To automate the setting of level of difficulty of all files for a particular client, go to the client page and use the Auto-Set Level drop-down menu.

To automate the setting of a group for a particular client, go to the client page and use the Auto-Set Group drop-down menu.

To automate the setting of RoR for a particular client, go to the client page and enter a figure in the Auto-Set RoR field.

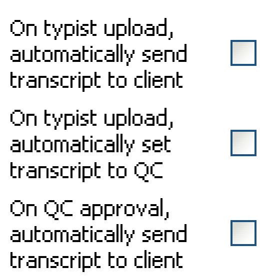
To automate file timing, ensure your client uploads in a format ScribeManager can time.

To automate the filling-in of an RoR rate for a particular typist, go to that typist's page and enter a figure in the pay rates boxes. (NB: this figure will apply only for files that are manually allocated to the typist, and not for files the typist claims via auto-claim.)

To automate the setting of deadlines on client upload (or more accurately, to require clients to set them), go to the Company Details page and select "show calendar – deadline required".

To automate the setting of files to auto-claim on upload, you need first to automate RoR and auto-set level for that client, and Enable Auto-Claim must be set to Yes for that client. You must also ensure the client uploads files in a format that ScribeManager can time, sets a deadline, and enters no Upload Comments. If any of these conditions is missing, to set a job to auto-claim you simply need to go to the Edit Job page and fill in the missing criterion.

On the Company Details page you will see these three options:



These boxes also appear on the Client page and the Edit Job page. However you check them on the Company Details page, that is the way they will be checked by default when you add a new client from then on (settings for existing clients are not changed). And however they are checked on the Client page, that is the way they will be checked when a new job for that client is added.

The meaning of these options should be self-explanatory. Note though that they involve a significant loss of control on your part. For example, if you check the first box, every time a typist uploads a transcript, it will go directly to the client without you being able to QC it.

Charges, and Making a Payment

Your first full calendar month of ScribeManager use is free. For example, if you set up your account on January 15th, the remainder of January plus all of February will be free, and you will only be liable for charges from 1st March. However, we will only ever levy charges if you actively confirm to us that you wish to become a paid user.

If you have been too busy to try ScribeManager properly, please contact us and we may be able to extend your free trial.

Your account balance is shown in the top right-hand corner of your ScribeManager screen (it is not visible to typists). If your balance goes below $0 during your free trial period, don't worry, you will not be charged. Once your free trial period is over and you become a paid user of ScribeManager, you will receive a statement at every month-end detailing your ScribeManager use and showing your cost incurred, which around that time will have been subtracted from your balance. At that point you should make a payment to bring your account balance back to $0 (if you pay a higher amount, your account will be in credit).

When you make a payment, ScribeManager will produce an invoice that you can use for your accounts. To view your invoices, go to My Account, View Invoices.

To make a payment, go to My Account, Make a Payment.

Current charges for using ScribeManager are as follows:

- US $1.00 per month (i.e., $1.00 covers your company's whole account including all users)
- US $0.0015 per transcript line that you put through ScribeManager. A "line" means 65 characters as counted by Practiline. Each transcript for a particular job is only charged for once, even if it is downloaded or uploaded multiple times, e.g. for QC.
- If you delete a transcript from ScribeManager, it will still be charged for, because the service has been used.
- If you delete a sound file for which a transcript was never uploaded, there is no charge. If you delete a sound file for which a transcript was uploaded, a fee of US $1 is charged but the line count fee for that transcript will not apply.
- US $0.21 per sms message per recipient. Sending sms messages is a non-mission-critical service that you need use only if you choose to.

We provide technical support without charge.

Technical support is normally provided free only to you, the CON administrator. If your typists have technical support questions, they should contact you in the first instance. If you want us to support your typists additionally, please discuss a paid support package with us.

Our free technical support covers only the usage and functionality of ScribeManager itself. It does not necessarily cover issues related to users' local PCs, networks, browsers, operating system configurations, bandwidth, etc.

Free technical support is provided without obligation or guarantee of any kind.

Please also see the next chapter, "Bespoke Solutions".

Bespoke Solutions

ScribeManager has been designed following consultation with a number of transcription companies to suit a variety of operating methods and workflow systems. However, no one solution can fit all possible users, and for that reason most users commission a bespoke version of ScribeManager, to be used solely by them.

The advantages of a bespoke version may include the following:

- ability for your company to have us adapt ScribeManager to your workflow methods
- ability to commission new features
- ability for your company to rebrand ScribeManager as you wish, e.g. renaming, hosting on a different URL, redesigning the home page and interface, etc.

We are very open to discussing bespoke requests, and we strongly encourage clients to approach us with their needs.

Note that if you commission a bespoke version of ScribeManager, updates and new features that we later develop for the main version may not be compatible with your version.

If you have commissioned a bespoke version and another client requests a bespoke version that is similar to yours, there may be an opportunity for you to sell a copy of your version to that client. This is however entirely voluntary on your part, and no other entity will have the right to use your version or a copy of it without your permission.

Unbound jobs

A bound job is a job where the typist is required to produce one transcript per sound file. Anything else is called an unbound job. For example, a client might upload one sound file containing three interviews and ask for one document per interview. Or they might upload two sound files and want both put into one transcript.

Be aware that processing unbound jobs is not as straightforward as processing bound jobs. For example, with a bound job ScribeManager knows when the job is complete because each sound file has a corresponding finished transcript, but, with unbound jobs, a transcript does not usually relate to one particular sound file, so the only way for ScribeManager to know when the job is finished is for it to ask the typist on transcript upload if that transcript is the last one for that job.

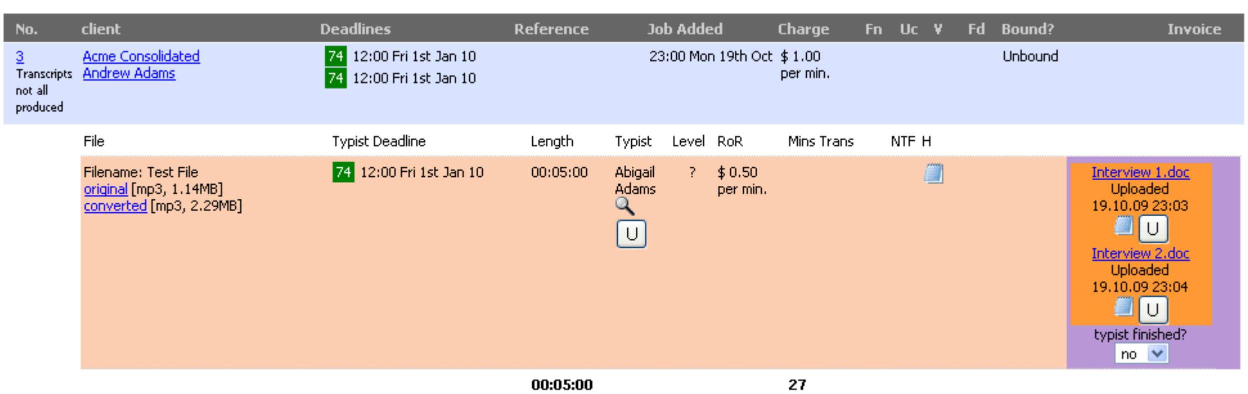
Because it can be complex to process unbound jobs, only experienced users of ScribeManager are advised to do so. Notes below are provided in brief, and assume considerable familiarity with ScribeManager.

To set a job to unbound, go to the Edit Job page and in the “Bound?” drop-down menu, select Unbound. It will not be available if any files for that job are already allocated. Note also that unbound jobs cannot be used with auto-claim or Mayday, or if the Billing Preference is flat fee.

Each time a typist uploads a transcript for an unbound job, ScribeManager will ask her if it is her last transcript for that job. If she confirms that it is, ScribeManager knows she has finished, and on the Live Jobs page a “typist finished?” drop-down will change to “yes”. However, if the transcript is thereafter set to QC, it will change back to “no”.

ScribeManager only assumes the whole job is finished when all the “typist finished” drop-down menus are set to “yes”. You may need to change some of them manually.

When a job is set to unbound, the right-hand part of the job is purple, but when transcripts are uploaded, the backgrounds to the transcripts will be as usual on ScribeManager, e.g.:



Because with unbound jobs individual transcripts do not equate to specific sound files, when a transcript is uploaded, it is shown beside *all* of that typist’s sound files for that job.

Uploads

As described in the chapter “Adding Jobs to ScribeManager”, clients can choose from several upload tools when uploading files to your ScribeManager account. Multiple tools are offered because no one tool works for everyone.

ScribeManager offers three upload tools which your clients can use to send you files– Java Jumploader, the Standard Uploader and the Primitive Uploader. However, it is also possible for your clients to send you files via ScribeManager’s YouSendIt account. If they do this, ScribeManager support must add the work manually to your job, so expect a delay while this happens.

Instead of using ScribeManager’s YouSendIt account, you can use your own. In fact you can use any system that involves the delivery of a recording via a URL, such as Box.net, Tonsho, Youtube, and many others. For more information about this, please see the next chapter “Adding URLs”.

If your clients use the main three upload tools on ScribeManager, please bear the following in mind: the transfer of files across the Internet is a complex technical process, especially for the large audio files that are used in transcription. Internet bandwidth is often unstable, and frequently “cuts out” momentarily, which can prevent a file transfer from succeeding. The larger the file being transferred, the longer it takes to transfer; and the longer it takes, the greater the likelihood of a bandwidth cut-out during transfer.

Other factors that can prevent file transfers from succeeding are:

- excessively stringent anti-virus or network security settings on the uploader’s PC
- non-standard and inappropriate browser settings on the uploader’s PC
- a crash or “freeze” on the uploader’s PC during transfer

NB: an upload that according to your Jobs Page has failed may not have been a genuine upload at all; the uploader might have been merely looking at the upload pages for future reference.

In short, there are many factors involved in an upload, most of which are beyond the control of ScribeManager, and beyond our capacity to investigate. If your client is unable to upload using the three main upload tools, they should use ScribeManager’s YouSendIt account.

Of the three file uploaders provided by ScribeManager, the Java uploader is unquestionably superior, because unlike the other two uploaders it can usually overcome bandwidth cut-outs; moreover, during a Java upload you as the administrator can see the percentage of the file uploaded (just as the client can), so that you know it is still in progress. Plus, when your clients are selecting files to upload via Java, they can select and drag, rather than having to browse for each file individually. We strongly recommend you encourage your clients to use the Java uploader, because once a client is set up to use it, all concerned should experience fewer issues.

Adding URLs

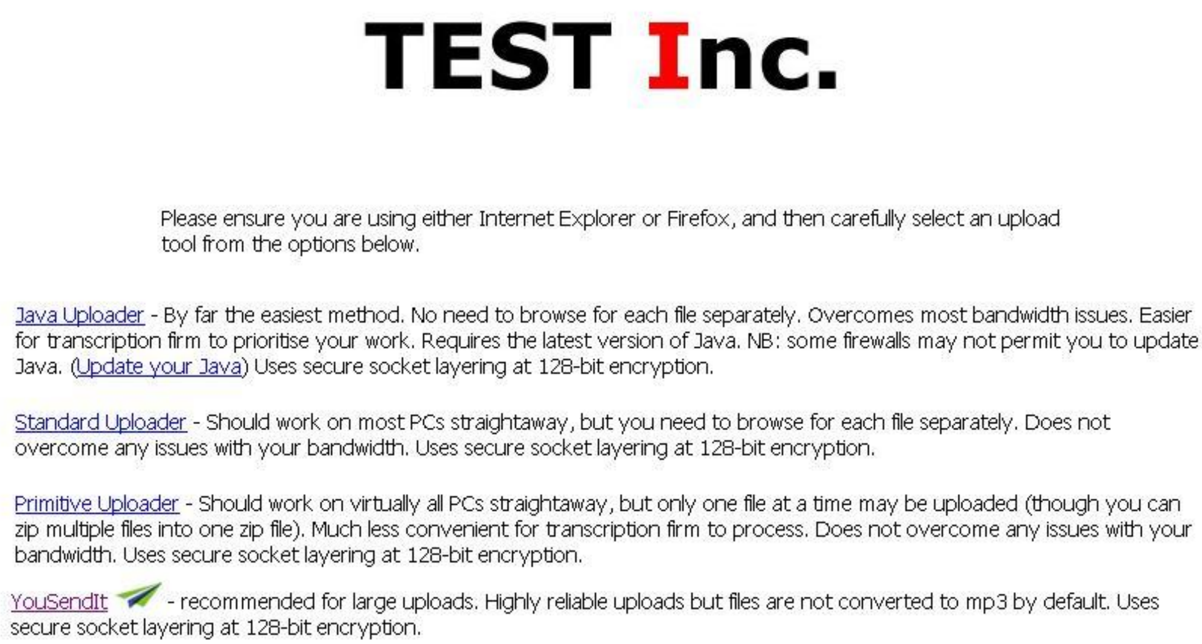
The most usual way to add work to your ScribeManager account is to upload sound files to it, as we have seen. However, ScribeManager also enables you to add not the sound file itself but a link to a sound file which is hosted elsewhere.

When you add a link rather than a sound file itself, the basic difference is that ScribeManager does not host the file, so when you or the typist download it, you do so not from ScribeManager but from the external location where it is hosted.

There are two main reasons why you would want to add a link (a URL) to ScribeManager rather than the file itself.

Firstly, it saves time in certain situations. If one of your clients provides you with a link to a sound file which they want you to transcribe, instead of downloading the file and then reuploading it into ScribeManager, you can simply add the link to ScribeManager.

Secondly, this system may enable you to integrate your current file transfer method into ScribeManager. If for example you currently receive files via YouSendIt, you can continue to do so via ScribeManager. Please contact us if you wish to do this. What we will then do is add your current file transfer method as an optional upload tool for your clients to use, as in the illustration below.



By default, the YouSendIt option links to ScribeManager's YouSendIt account, but we can make it link to yours, or to any other file transfer system you use. We can also alter the text for you, for example to include guidelines to clients about when to use this option. You may want them to use it only for files above a certain size, for instance.

To reiterate, when your clients upload using your own file transfer system, the job is automatically created on ScribeManager but the files are not added to the job. You will receive a notification from your file transfer system containing links to the files, and you must manually add those links into ScribeManager using the URL Adder on the Job Edit page. To do so, go to the Job Edit page, then go to "Add files to this job", and select URL Adder.

When you add a URL rather than a sound file, ScribeManager cannot automatically time the file or convert it to mp3, because it does not have the file, so you will need to add that information manually.

Here is a final but important point about adding URLs. Most file uploads to ScribeManager are trouble-free, but occasionally a client is unsuccessful, whether due to human error on the part of the client, poor bandwidth, firewall settings, or a number of other factors. In these situations it is virtually impossible to ascertain the cause of the issue since it is dependent on so many variables, and there may be a natural tendency for the client to blame you, or ScribeManager. That is the main reason why we make the YouSendIt option available. YouSendIt has over 14 million users and is highly reliable, so should always work as an option of last resort; and because it is not part of ScribeManager, clients cannot blame you, the transcription firm, if they fail in their use of YouSendIt.

If you integrate your own YouSendIt account into ScribeManager, you add the URLs manually yourself. If you use ScribeManager's inbuilt YouSendIt account, ScribeManager support will add your URLs manually – please allow time for this.

The URLs for files uploaded to your via the ScribeManager YouSendIt account are visible only to you but are not password-protected. If you require password protection, you should use your own YouSendIt account.

Other products

ScribeManager is one of several sophisticated and innovative tools from Tyger Valley Systems for use by transcription firms. Others include:

ScribeSifter

ScribeSifter enables you to configure your own online test that can be taken by an infinite number of applicants. It automatically filters out the unsuccessful ones so that only those who pass get through to you. No more need to waste time sifting 1000s of dud applications to find the few who make the grade. ScribeSifter does all the hard work for you!

Speechfilter

Speechfilter is a hardware solution for transcribers that reduces the volume of background noise that obscures voices in recordings, boosts volume on quiet recordings, and routes or blocks stereo channels.

FindTranscriptionWork.com

FindTranscriptionWork.com is a completely free site where you can post any transcription vacancies at your company. You can also use it to browse resumés added to the site by transcribers.

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The FTW Transcriber

The FTW Transcriber is free transcription software with a wide variety of features:

- displays business opportunities for transcribers
- plays huge range of file types (it plays whatever Windows Media Player can play)
- plays video files (mpeg, wmv, flv, etc) with visuals displayed
- plays files either on your local drive or on remote servers without downloading first!
- local files play instantly - no wait for loading
- range of features including auto-backspace, hotkeys, speed adjuster, etc
- can be used with hotkeys, the Infinity USB pedal (same as Express Scribe pedal), the vPedal, or Olympus RS27 and RS28 pedals

About Tyger Valley Systems

Patrick Gubbins (Managing Director)

In 2000 Patrick founded what is now one of the UK's largest transcription firms, which attracted venture capital backing in 2002 and now processes around 15,000 hours of recording per year. He has designed and project-managed transcription workflow systems, transcription recruitment systems, and a variety of transcription-related web sites and software applications. He has a degree in Mandarin Chinese and speaks several other languages.

Brian Prosser (Strategic Development Officer)

Brian has had a long and distinguished career in information technology, having headed the development of Washington Mutual Bank's online banking system, and participated in the design of Windows Media Player. He is a serial entrepreneur, and has founded a graphic design publishing company, a construction company, a server hosting company, and has been responsible for the design and programming of countless web sites. He has lived and worked in many countries and speaks several languages.

Hiram Dixon (Chief Technical Officer)

Hiram was an early pioneer in network technology with a focus on IT and advanced PHP development. He serves on the technology advisory boards of several organizations and enterprises, including EMU Webware, the Perth State Technology Board, and the Open Mobile Alliance. Hiram has a degree from Cardiff University, and is a regular guest speaker at IT events in the USA, Australia and Europe.

Maris Janelsinsh (Senior Developer)

Since 2004 Maris has built both large and small corporate web sites, plus innumerable personal web pages and blogs, as well as several intranet and extranet sites for Tyger Valley Systems. He has worked with a wide range of Web technologies including XML, CMS, HTML, PHP, Perl, C, JavaScript, Ruby and Java. Maris has a degree in Computer Science from the University of Riga.

What Else Do We Do?

As well as the products outlined in this manual, we're able to provide a wide range of services for transcription firms, including but not limited to the following:

- software programming (php, html, Ajax, Javascript)
- database development
- web site design, hosting and maintenance
- photography, video production and webinars
- social media integration (Facebook, Twitter, etc)
- content management systems (e.g. Wordpress)
- IT troubleshooting
- digitization of analogue material, e.g. cassette to mp3
- application programming (Windows, Android, iPhone)
- e-commerce solutions, secure transaction, shopping cart integration
- database compilation