



## User's Manual (Solo Transcriber's Version)

**SCRIBEMANAGER**

2009  
From Tyger Valley Systems



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<b>INTRODUCTION .....</b>	<b>2</b>
<b>NOTES .....</b>	<b>3</b>
<b>WHAT EXACTLY DOES SCRIBEMANAGER DO?.....</b>	<b>4</b>
<b>GETTING SET UP (THE COMPANY DETAILS PAGE) .....</b>	<b>5</b>
COMPANY DETAILS PAGE (TOP PART) .....	5
COMPANY DETAILS PAGE (MIDDLE PART).....	6
COMPANY DETAILS PAGE (BOTTOM PART).....	7
<b>ADDING USERS .....</b>	<b>8</b>
<b>ADDING A CLIENT .....</b>	<b>10</b>
<b>ADDING JOBS TO SCRIBEMANAGER.....</b>	<b>11</b>
<b>ALLOCATING A JOB .....</b>	<b>13</b>
<b>UPLOADING FINISHED TRANSCRIPTS.....</b>	<b>14</b>
<b>BASIC INVOICING.....</b>	<b>16</b>
<b>BACKGROUND COLORS .....</b>	<b>17</b>
<b>THE ADD CLIENT PAGE.....</b>	<b>18</b>
<b>THE EDIT JOB PAGE .....</b>	<b>20</b>
<b>BULK INVOICING .....</b>	<b>22</b>
<b>CLIENTS' ACCESS TO SCRIBEMANAGER .....</b>	<b>23</b>
<b>EDITING MESSAGES .....</b>	<b>24</b>
<b>SEARCH BOXES .....</b>	<b>24</b>
<b>AUTOMATION.....</b>	<b>25</b>
<b>MAKE A PAYMENT.....</b>	<b>26</b>
<b>TAILORED SOLUTIONS.....</b>	<b>27</b>
<b>UNBOUND JOBS .....</b>	<b>28</b>
<b>UPLOADS .....</b>	<b>29</b>

## Introduction

Thank you for your interest in ScribeManager.

This manual applies to the STANDARD version of ScribeManager, not to any bespoke version that has been configured for any particular client. If the standard version of ScribeManager does not meet your requirements, we can set up a bespoke version for you that can be developed to meet your exact specifications. Please contact us for more information.

Please note that this version of the user manual is for solo transcribers, i.e. transcribers who run their own transcription business without using or employing other transcribers. If you do not fit that description, please go to <http://www.scribemanager.com/manuals.html> and download the correct manual.

ScribeManager is a powerful tool that contains a wide range of features. However, as a solo transcriber you will not need some of those features of ScribeManager; for example, you will not need to set your own transcripts to Quality Control! This manual contains explanations only of the features a solo transcriber is likely to use.

ScribeManager is designed to help solo transcribers by automating many of the time-consuming tasks associated with running a small transcription business. It can be a way of finding clients through the job notifications that are periodically sent to users. It can also help by backing up your data, providing your clients with convenient upload tools, automatically converting many files types 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.

ScribeManager aims to help you automate your business to the point where if you wish you can focus your energies on building it rather than simply running it. As your business grows, you may find you need more of ScribeManager's features, and you can move to the more advanced version of this manual.

ScribeManager is not intuitive, and you will not be able to understand it properly by trial and error.

This manual is designed to be straightforward to follow, but if you nonetheless have questions, or if you would prefer us to talk you through setting up your ScribeManager account, please email us via the contact page of our web site, [www.ScribeManager.com](http://www.ScribeManager.com). Alternatively please contact us.

## Notes

Please note the following points:

- even we do not know your login password. If you forget your password, please telephone us and we will email you a link which you can use to reset your password.
- for security reasons, you cannot log in to ScribeManager more than once in the same browser on the same computer.
- if at any time ScribeManager looks or functions differently from what is described in your manual, please check for a newer version of the manual. Please also note that this manual applies to the STANDARD version of ScribeManager, not to any bespoke version that has been configured for a particular client.

## What exactly does ScribeManager do?

ScribeManager's workflow features enable you to conveniently manage your transcription tasks and automate them to a high degree. 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.
- Next, ScribeManager automatically creates a job for that client in your ScribeManager account, and for most file types displays the length of those files, their deadline, and any other information relevant to that client's work.
- ScribeManager automatically converts many of the files to mp3, giving you the option to work with the mp3 version instead.
- 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 wish to invoice your clients before you send the 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 original or the mp3 version), and also download their transcripts.

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

We welcome suggestions as to improvements or alterations you would like to see in ScribeManager.

If you would like to discuss with us how your ScribeManager can assist your workflow, or if you have any other query about any aspect of ScribeManager, please contact us.

If you are ready to try ScribeManager for yourself, please sign up for a free trial on [www.scribemanager.com](http://www.scribemanager.com), if you have not already done so, and follow 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](http://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)

#### Company Details

##### Test Company

Company address\*

Country\*

State

City

Postcode\*

Your time zone

After selecting your time zone, save this page and then see the top right corner for your local time.

##### Client upload page

URL  <sup>1</sup>

Upload page calendar   <sup>2</sup>

Background color  <sup>3</sup>

To select a background color, enter a hex triplet number (without #). Examples here: [http://en.wikipedia.org/wiki/List\\_of\\_colors](http://en.wikipedia.org/wiki/List_of_colors)

Font   <sup>4</sup>

##### Site Preferences

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

2 – here you can decide whether you want to require 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. Note that 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 Unit California

### Site Preferences

For bound jobs, transcript title must equal sound file title

Email invoices from\*

Email transcripts from\*

On typist upload, automatically send transcript to client

On typist upload, automatically set transcript to QC

On QC approval, automatically send transcript to client

Logo [Delete Logo](#)

# TEST Inc.

### Estimate dss file length?

- turned off
- turned on, default to "normal play" mode
- turned on, default to "long play" mode

### Usage Settings

1 - if you check this box, for most jobs ScribeManager will only allow you 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 the right place.

3 - assuming you do not want to QC your own transcripts, check the first box as per above.

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 and jobs that you add, but you can override it for individual clients and jobs.

## Company Details page (bottom part)

### Invoice Settings

Billing Preference\*  1

Currency\*  2

\$ Rate  3

Sales tax %\*  If you do not add sales tax, please enter 0 in this field. 4

Sales tax name\*

### Invoice Header\* 5

Please enter text for invoice header, e.g. company name, company address, phone number, etc. You may use html if you wish. (If you would like your logo to be added to the top of your invoices, or would like help with formatting text, please contact us.) To preview, click the magnifying glass icon below.

```
<p><strong>TEST COMPANY TRANSCRIPTIONS
1 PIKE PLACE
SEATTLE
98101
USA</strong></p>
<p></p>
```

### Invoice Footer\*

Please enter text for invoice footer, e.g. payment terms, bank details, company director names, etc.

```
<p><strong>Registered in Washington no 12345678
Director Jane Smith</strong></p>
```

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

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

3 – 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 and jobs added 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.

4 – here, enter the sales tax in your jurisdiction, and the rate. If you do not add sales tax, enter a rate of zero.

5 - type here the text you want at the top of your invoices (it will appear centered on your invoices), then 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 section, 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

You are already on ScribeManager as an administrator but you now need to add you as a typist.

(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 users who have logins in your ScribeManager account, which at present should be only one.

Name	Login	CON	QC	Role	Active
Jane Smith				Admin	Yes

Typist	Login	Active	Location	Level	Groups
					<a href="#">manage groups</a>

1 – 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.

Click Add New User, and we will add you as a typist

### Instructions

Enter your first name and last name; select level 1; select the role of typist; use your email address; think of a memorable username; 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:

First Name *	<input type="text" value="Abigail"/>	Direct	<input type="text"/>	<b>Groups</b>	<input type="text"/>
Last Name *	<input type="text" value="Adams"/>	Home	<input type="text"/>	<b>Login Username *</b>	<input type="text"/>
Active	<input checked="" type="checkbox"/> Yes	Mobile	<input type="text"/>	Current Username	abigailadams
Level	1 <input type="text"/>	Skype	<input type="text"/>	Change Username	<input type="text" value="abigailadams"/>
Role *	Typist <input type="text"/>	MSN	<input type="text"/>	<b>Login Password</b>	<input type="text"/>
Email *	<input type="text" value="[your email address]"/>	AIM	<input type="text"/>	<input type="text"/>	<input type="text"/>
Birth Date	<input type="text"/> DD   <input type="text"/> MM   <input type="text"/> YYYY	SMS number	<input type="text"/>	<input type="text"/>	<input type="text"/>
Gender	<input type="radio"/> Male <input type="radio"/> Female	Personal Page	<input type="text"/>	<input type="text"/>	<input type="text"/>
Native Language	None <input type="text"/>	<b>Pay rates</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Country	None <input type="text"/>	Per Minute	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address 1	<input type="text"/>	Per Word	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address 2	<input type="text"/>	Per Line	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address 3	<input type="text"/>	Flat Rate	<input type="text"/>	<input type="text"/>	<input type="text"/>
City	<input type="text"/>	<b>Mayday &amp; Autoclaim enabled?</b>	<input checked="" type="checkbox"/> Yes	<input type="text"/>	<input type="text"/>
State	None <input type="text"/>			<b>Assigned Files</b>	<input type="text"/>
Post code	<input type="text"/>				This user does not currently have any assigned jobs

You are now added to ScribeManager as both the administrator and a typist. Typists have separate login details from administrators, but if you always log in as the administrator you can then quickly log in as the typist from there by going to the System Users page and clicking on the magnifying glass beside your typist 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.

We will now add an example client. Go to Client Management, Add New Client.

### Instructions

Enter a made-up company name; 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, and add your email address. Then click Save in the top right.

You should now see something like this:

The screenshot shows the 'Edit client' form for 'Acme Consolidated'. The form is divided into several sections:

- Client Information:** Fields for Company Name (Acme Consolidated), Country (United States), Address 1 (1 Smith Street), Address 2, Address 3, City (New York), State (New York), Post code (12345), Office Phone, Fax, Company Reg. No., and Web site.
- Client Preferences:** Includes 'Enable Auto Claim' (Yes/No), 'Auto-set level' (None), 'Auto-set group' (None), 'Auto-set RoR', and three checkboxes for automatic transcript sending (to client, to QC, and to client on QC approval). Invoicing preference is set to 'Single Invoicing'. 'Email invoices to' is empty. 'Billing Preference' is 'per min.'. 'Estimate dss file length?' is 'turned off'. 'Currency' is 'America (United States of America), Dollars'. '\$ Rate' is empty. 'GST %' is 10.00.
- Notes and Formatting:** Fields for 'Formatting Doc' (with a 'Browse...' button), 'Billing Notes', 'Formatting Notes (typist will see)', 'Client Notes', 'Allocation Comments', and 'Sending Reminder'.
- Contacts:** A link to 'add contact' and a list of contacts, currently showing 'Andrew Adams'.

We can now process an actual job in ScribeManager.

## 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 by going to Admin Job, Add New Job.

Of these two methods, the first is 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. Please have ready the client upload URL you saw on the Company Details page, the email address of the client contact person you just added, and 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.

Open a new browser, and go to the client upload URL. You should see something like this:

# TEST Inc.

Welcome to our site.

To begin uploading work to us, please enter your email address in the box below.

Enter your email address:

Proceed to upload

OR: click [here](#) to login to your account

This is the page your client 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:

# TEST Inc.

Please enter any comments about this job in the box below.

**Set deadline for this job**  
(required)

**Step 1 - Set time of day (24-hour clock)**  
Select hour  : Select mins

**Step 2 - Set date**

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Mo	Tu	We	Th	Fr	Sa	Su
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

(TIP: Calendar too slow? Click here to set date: [today](#), [tomorrow](#), or [3](#), [7](#), [14](#), [21](#), [28](#), [35](#), [42](#), [49](#), [56](#), [63](#), [70](#), [77](#), [84](#) days from now.)

**Deadline:**

Type in the box below any comments you have about the material you are uploading.

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:

# TEST Inc.

Please carefully select an uploader from the options below.

[Java Uploader](#) -By far the easiest method. No need to browse for each file separately. Overcomes most bandwidth issues. Easier for transcription firm to prioritise your work. Requires the latest version of Java. NB: some firewalls may not permit you to update Java. ([Update your Java](#))

[Standard Uploader](#) - Should work on most PCs straightaway, but you need to browse for each file separately. Does not overcome any issues with your bandwidth.

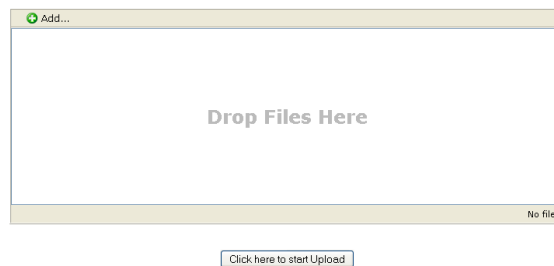
[Primitive Uploader](#) - Should work on virtually all PCs straightaway, but only one file at a time may be uploaded (though you can zip multiple files into one zip file). Much less convenient for transcription firm to process. Does not overcome any issues with your bandwidth.

This page offers the client a choice of three 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 ease of use. Also see the section Uploads in this manual.

We strongly 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.

You can use any of the three upload tools, but this section of the manual assumes you are using the Java Uploader.

Click Java Uploader (if it does not work, 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 other upload tools, or contact us for support. Note though that we cannot always resolve upload problems if they are due to technical issues beyond our control.

## 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:

No.	client	Deadlines	Reference	Job Added	Charge	Fn	Uc	V	Fd	Bound?	Invoice
2	<a href="#">Acme Consolidated</a> Transcripts not all produced	74 12:00 Fri 1st Jan 10 74 12:00 Fri 1st Jan 10		8:40 Mon 19th Oct	? per min.					Bound	
	File	Typist Deadline	Length	Typist	Level	RoR	Mins Trans	NTF	H		
	Filename: Test File <a href="#">original</a> [mp3, 1.14MB] <a href="#">converted</a> [mp3, 2.29MB]	74 12:00 Fri 1st Jan 10	00:05:00		?	\$ 0.00 per min.					
			00:05:00								

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 you as the 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 yourself. Then click Save.

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

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

You can log in separately as the typist from ScribeManager.com home page, but the quickest way now is to 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 yourself as a 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 you the typist, and you will see the typist’s view, which does not include client details, etc:

No.	Sound File	Length	Deadline	Bound?	Pay Rate	Notes	V.	Fd	Upload Transcript
4	Filename: Test File <a href="#">original</a> [mp3, 1.14MB] <a href="#">converted</a> [mp3, 2.29MB]	05:00	73 12:00 Fri 1st Jan 10	Bound	per min.				<input type="button" value="Upload"/>

You can download the sound file to transcribe it, either by clicking on “original”, which downloads the exact original file that the client 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 130 Test File**

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

Recording quality\*

Missing words\*

Comments to client

---

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:

**All jobs**

No.	Sound File	Length	Deadline	Bound?	Pay Rate	Notes	V.	Fd	Upload Transcript
130	Filename: Test File <a href="#">original</a> [mp3, 4.58MB] <a href="#">converted</a> [mp3, 2.29MB]	05:00	<span style="background-color: #90EE90;">109</span> 12:00 Fri 1st Jan 10	Bound	per min. 0.50				<a href="#">Test File.doc</a> Uploaded 14.09.09 16:01

You can now close down this browser, and return to admin's Jobs List page. You will note that the job is no longer visible on default view, because it has been sent to the client, and the Jobs List page by default shows only jobs in progress.

Assuming you used your email address as the client's, you will now receive in your email what the client receives when the transcript is sent to them.

We still need this job, because we have to invoice it. So 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.

You should now see something like this:

No.	client	Deadlines	Reference	Job Added	Charge	Fn	Uc	V	Fd	Bound?	Invoice
2	<a href="#">Acme Consolidated</a> <a href="#">Andrew Adams</a>	<span style="background-color: #90EE90;">74</span> 12:00 Fri 1st Jan 10 <span style="background-color: #90EE90;">74</span> 12:00 Fri 1st Jan 10		8:40 Mon 19th Oct	\$ 1.00 per min.		<input type="checkbox"/>			Bound	<a href="#">Create invoice</a>
File											
		Typist Deadline	Length	Typist	Level	RoR	Mins Trans	NTF	H		
	Filename: Test File <a href="#">original</a> [mp3, 1.14MB] <a href="#">converted</a> [mp3, 2.29MB]	<span style="background-color: #90EE90;">74</span> 12:00 Fri 1st Jan 10	00:05:00	Abigail Adams	1	\$ 0.50 per min.	5	<input type="checkbox"/>			<a href="#">Test File.doc</a> Sent to Client 19.10.09 21:45
							<b>00:05:00</b>			<b>5</b>	

## Basic Invoicing

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

### Create invoice


#### Billing info for job #2

**Company:** Acme Consolidated  
**Contact:** Andrew Adams  
**Send to Email:** info@testcompany.info  
**Include in invoice:**  Only current job - #2  
 All finished jobs for this company (i.e. where the status of the transcripts is "Sent to client")

**Enter Invoice No.**

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

You can preview the invoice by clicking on the magnifying glass icon. If you wish to alter the invoice layout, 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.

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.

## Background Colors

ScribeManager uses different background colors (white, blue, peach, etc) for sound files depending on their status. However, as a solo transcriber you will find most of these colors irrelevant. Note however that a grey job means that all transcripts have been sent to the client, and the job can be invoiced.

## 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).

Only those features on this page that are relevant to you as a solo transcriber are explained below.

**Add Client** Save

Company Name \*

Country \*  **1**

Address 1

Address 2

Address 3

City

State

Post code \*

Office Phone

Fax

Company Reg. No.

Web site

**First Contact**

First Name \*

Last Name \*

Email \*

Direct Tel.

Home Tel.

Skype

MEM

Enable Auto Claim  Yes  No

Auto-set level:

Auto-set group:

Auto-set RoR:

On typist upload, automatically send transcript to client

On typist upload, automatically set transcript to QC

On QC approval, automatically send transcript to client

Invoicing preference  Single Invoicing or  Collated Invoicing **2**

Email invoices to  **3**

Billing Preference \*

Estimate dss file length?  turned off  
 turned on, default to "normal play" mode  
 turned on, default to "long play" mode

Currency \*

\$ Rate

GST %

Formatting Doc **4**

Billing Notes **5**

Formatting Notes (typist will see) **6**

Client Notes **7**

Allocation Comments

Sending Reminder **8**

1 – Enter the client’s address carefully, because it will appear on your invoices to them.

2 – 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.

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

4 – If you upload a document here, it will appear whenever a job is added for this client. You can use this to provide templates, vocab lists, etc. You can upload any file type including a zip.

5 – If you add text here, it will appear 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”.

6 – If you add text in this field, it will appear when a job is added for this client.

7 – Add here any general notes about this client. They will appear on the Edit Job page.

8 - 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 it to typists. Again, below are explained only the features you are likely to need as a solo transcriber.

**Edit job 4** (Transcripts not all produced) Last saved: 04:34 20-10-09 Delete Permanently Change to Deleted Status Save

Job Number 4 Client formatting doc None Formatting Notes (typist will see)

Client \* Acme Consolidated 1 Vocab doc Browse... 2

Contact \* Andrew Adams Billing Preference\* per min. Client Notes

Client Reference America (United States of America), Dollars Client Notes

Client Deadline 12:00 Fri 01st Jan 10 73 \$ Rate\* 1.00

Internal Deadline 12:00 Fri 01st Jan 10 73 GST % 10.00

Bound? Bound Postage 3

On typist upload, automatically send transcript to client  Courier 3

On typist upload, automatically set transcript to QC  Other Charges Amt 4

On QC approval, automatically send transcript to client  Other Charges Desc. 4

Estimate dss file length?  turned off Billing Notes

turned on, default to "normal play" mode Upload Comments 5

turned on, default to "long play" mode 9

Auto-claim Enabled  Yes  No ? 10

**Audio Files for Job 4** Using Java uploader add more files to this job here. Cascade first file [-] [+]

File Name	Level	Group	Mayday	Typist	Typist Deadline	Length	RoR
Filename: Test File 6 <a href="#">rename</a>   <a href="#">original</a> [mp3, 1.14MB] <a href="#">converted</a> [mp3, 2.29MB]	none	all	off	Please Select	12:00 Fri 01st Jan 10 73	00:05:00	0.00 per min. x

Notes to Typist for This File 7

8

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 - Here you can upload a document that will appear just for this one job, e.g. a vocabulary document.

3 – 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.

4 – 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.

5 – In this box you will see the comments the client typed when uploading the job to you.

6 – 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.

7 – Type here any text that applies just to this one sound file and not to the entire job.

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

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

10 – To add extra sound files to this job, use this feature.

## Bulk Invoicing

We have already seen one way to create an invoice, in the section Basic Invoicing. In that manner, you can create one single invoice, either just for that one job or for 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 section “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 on your system, and then 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 different contacts at the same company are all grouped into the one invoice.

## Clients' Access to ScribeManager

Your clients can log in to their own version of ScribeManager to download their sound files (original or converted), to see the status of their jobs, and even to download their transcripts when produced. This can be very useful for example if your client needs a transcript to be resent urgently, but cannot reach you. It should also save you from having to deal with repeated telephone enquiries from clients as to the status of their work. Moreover, some clients consider it more secure to receive transcripts by download than by email.

To get a ScribeManager login, clients simply follow the links on their upload page: “click here to login to your account”, then “Need a password? Click here”.

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.

## Editing Messages

Go to Settings, Edit Messages. You will see five text boxes. The first four 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 details about your polices and processes (taking care of course not to overload them with rules and information).

The fifth 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, but much of it will be irrelevant to you as a solo transcriber.

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

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”.

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

- On typist upload,  
automatically send  
transcript to client
- On typist upload,  
automatically set  
transcript to QC
- On QC approval,  
automatically send  
transcript to client

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. And however they are checked on the Client page, that is the way they will be checked when a job for that client is added.

The meaning of these options should be self-explanatory. As a solo transcriber, you will probably not want to set your transcripts to QC, so you would probably check only the first option.

## Make a Payment

You may use ScribeManager for up to 30 days without charge (though some non-essential features such as sms messaging may be restricted). You will be notified by email when your free trial period is nearing its end.

At that time, please make a payment using your credit card or Paypal account, by going 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 \$0.01 per MB of server use on your account, i.e. uploads and downloads of sound files and transcripts. Please note that your account is debited for the full file size when you click on the file to download it, even if you do not complete the download.
- US \$0.21 per sms message per recipient

Technical support is provided at no cost.

Our free technical support covers only the usage and functionality of ScribeManager itself. It explicitly does not 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, and may be refused in extreme situations.

Paid technical support in other transcription-related areas may be possible; please contact us to discuss.

Please also see the next section, Tailored Solutions.

## Tailored 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 your company may wish to discuss with us a tailored version of ScribeManager, to be used solely by your organization.

The advantages of a tailored version may include the following:

- ability for your company to adapt ScribeManager to your workflow methods
- ability to commission specific features

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

## 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 necessarily relate to a sound file, so the only way for ScribeManager to know when the job is finished is for it to ask you.

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 allocated or set to auto-claim or Mayday, or if the Billing Preference is flat fee.

Each time you upload a transcript for an unbound job, ScribeManager will ask you if it is your last transcript for that job. If you confirm that it is, ScribeManager knows you are 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.:

No.	client	Deadlines	Reference	Job Added	Charge	Fn	Uc	V	Fd	Bound?	Invoice
3	Acme Consolidated Andrew Adams	74 12:00 Fri 1st Jan 10 74 12:00 Fri 1st Jan 10		23:00 Mon 19th Oct	\$ 1.00 per min.					Unbound	
Transcripts not all produced											
File	Typist	Deadline	Length	Typist	Level	RoR	Mins Trans	NTF	H		
Filename: Test File original [mp3, 1.14MB] converted [mp3, 2.29MB]	Abigail Adams	74 12:00 Fri 1st Jan 10	00:05:00	Abigail Adams	?	\$ 0.50 per min.					<a href="#">Interview 1.doc</a> Uploaded 19.10.09 23:03  <a href="#">Interview 2.doc</a> Uploaded 19.10.09 23:04  typist finished? no
							00:05:00			27	

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

## Uploads

As described in the section Adding Jobs to ScribeManager, clients can choose any one of three upload tools when uploading files to your ScribeManager account. Three choices of tool are offered because no one tool works for everyone.

The transfer of files across the Internet is a complex process, especially for the large files that are often used in transcription. Internet bandwidth is often unstable, and frequently “cuts out” momentarily. 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. A bandwidth cut-out can often prevent a file transfer from succeeding.

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

Note that an upload that appears to you to have failed may not have been a genuine upload at all; the uploader might have been merely testing the upload mechanism.

In short, there are many factors involved in an upload, most of which are beyond the control of ScribeManager, and certainly beyond our capacity to investigate. For this reason, we cannot provide free support for upload issues.

Ultimately, if your client cannot upload directly into ScribeManager, they may need to send the file to you in another format for you to upload into ScribeManager on their behalf. They could for example use one of the many free file transfer services on the Internet. To find one, do a Google search for “free file transfer”.

Of the three uploaders provided by ScribeManager, the Java uploader is unquestionably superior, because unlike the other two uploaders it can usually overcome bandwidth cut-outs; plus 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. Moreover, 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.

Note that if an uploader is using Skype or a similar messaging product during upload, they may be temporarily disconnected from Skype.