

# scribmanager

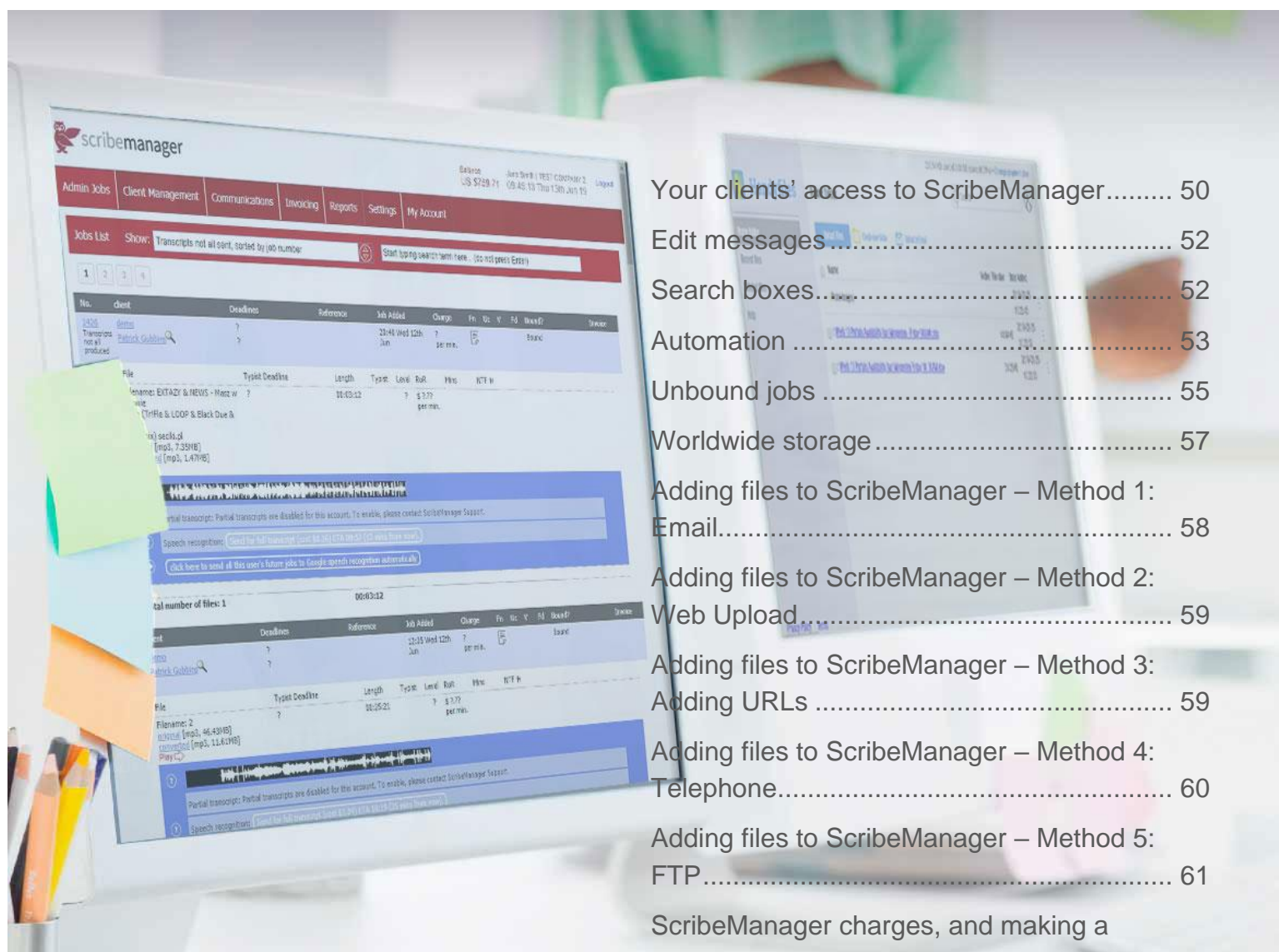
Born in 2008.



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# INTRODUCTION

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

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, if the "standard" version of ScribeManager at [www.ScribeManager.com](http://www.ScribeManager.com) doesn't appear to meet your requirements, please contact us to discuss ways it can be configured to suit you.

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 less manual work and less likelihood of human error. For most transcription companies ScribeManager also reduces costs and boosts profit margins.

ScribeManager helps you in many ways, for example by backing up your data, providing your clients with convenient upload methods, automatically converting many incoming files to the mp3 format, reducing their level of background noise, 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 has so many features that you are unlikely to need all of them. The system 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 go through 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](http://www.ScribeManager.com).

## NOTES

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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. We never take credit card details.

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

For security reasons, even we do not know your ScribeManager login password. If you forget your password, click “forgot your login?” on the home page, [www.ScribeManager.com](http://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.

Never let more than one person in your company use the same admin login details at the same time; if they do, they may overwrite each other’s data. ScribeManager’s Edit Job page has a “checking out” feature that will prevent more than one user from editing that particular page at the same time, but it works only if they are using different logins.

If at any time ScribeManager functions differently from what is described in your manual, please check for a newer version of the manual. Again, please note that this manual applies to the STANDARD version of ScribeManager, not to any bespoke versions configured for particular clients.



# WHAT EXACTLY DOES SCRIBEMANAGER DO?

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ScribeManager enables you to manage a transcription operation of any size with ease, 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 sends files to your ScribeManager account via one of the various available methods (web upload page, ftp, email attachment, telephone dictation, etc).
- 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 incoming files to mp3, giving you and your typists the option to work with the original file or the mp3 version. When converting files, ScribeManager reduces the level of background noise in the converted mp3 version.
- You can allocate files to typists manually or let typists claim them for themselves according to rules that you set, or you can do a combination of the two.
- ScribeManager enables you to manage the rates you pay to typists in such a way as to minimize your expenditure on typing staff.
- When typists have produced a transcript, they upload it back into ScribeManager, where it can be automatically set to QC if required, or sent automatically to the client.
- 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 completed transcripts.










ScribeManager enables you to divide your typists into five levels of ability, and you can also divide them into groups for convenient management, e.g. according to territory, cost, experience, shift, or anything else you wish.

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, please sign up for a free trial at [www.ScribeManager.com](http://www.ScribeManager.com), if you have not already done so, then continue to read this manual.

## GETTING SET UP

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 address*	<input type="text" value="1 Pike Place"/> <input type="text"/> <input type="text"/>
Country*	<input type="text" value="United States"/> 
State	<input type="text" value="Washington"/> 
City	<input type="text" value="Seattle"/>
Postcode*	<input type="text" value="98101"/>
Your time zone	<input type="text" value="GMT +00:00 U.K."/> 
After selecting your time zone, save this page and then see the top right corner for your local time. NB: when clocks change in your location for summer time, you will need to adjust your ScribeManager time using this drop-down.	
Require 2FA for staff (chargeable)	<input type="checkbox"/>
Require 2FA every:	<input type="text" value="On every login"/> 
<b>Client uploads</b>	
Upload email:	<a href="mailto:testcompany2@scribemanager.com">testcompany2@scribemanager.com</a> (Your clients can email audio files to this email address and they will be added into your workflow. Current maximum size is 30.00 MB. To increase this, please contact ScribeManager Support.)
Upload URL	<a href="https://testcompany2.scribemanager.com">https://testcompany2.scribemanager.com</a>
Default file hosting location ?	<input type="text" value="ScribeManager Default"/> 
Upload page calendar	<input type="text" value="Show calendar - deadline optional"/> 
Background color	<input type="text" value="ffffff"/> To select a background color, enter a hex triplet number (without #). Examples here: <a href="http://en.wikipedia.org/wiki/List_of_colors">http://en.wikipedia.org/wiki/List_of_colors</a>
Font	<input type="text" value="Tahoma"/> 
<b>Automatic Timestamps and Speech Recognition (optional) ?</b>	
Main language	<input type="text" value="English (US)"/> 
Timestamps	<input type="text" value="Show 1/10ths of seconds hh:mm:ss.0"/>  (Need different formatting? Contact Support.)

Upload email –your clients can email audio files to this address, and they will be processed and added into your ScribeManager workflow.

Upload URL – your clients can upload files securely via your bespoke ScribeManager web page, and those files will be added into your workflow.



Default file hosting location – here, choose where you want your clients' audio files and transcripts to be hosted. Whatever you set here is only the default – you can set different storage locations for different clients later.


Upload page calendar – here you can decide whether you want to force your clients to set a deadline for the work which they upload via the web page. If they do set a deadline, that deadline automatically appears in your ScribeManager account for that job, which saves you having to set the deadline yourself.

Background color – choose a background color for your upload page (normally you would use the same color as your web site's background).


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

Automatic Timestamps and Speech Recognition – ScribeManager can optionally send your incoming audio recordings for speech recognition and timestamping. This is a charged service but is fully optional. If you do not plan to use that feature, you can ignore this section.

## Site Preferences

Number of jobs to display on Jobs List page:  

For bound jobs, transcript title must equal sound file title ☐

Invoice format  

Email invoices from\*

Email transcripts from\*

Attach transcript to transcript emails to Contacts ☐

On typist upload, automatically send transcript to client ☐

On typist upload, automatically set transcript to QC ☐

On QC approval, automatically send transcript to client ☐

NB: If you check any of the above three options, they will be applied by default only to clients you add AFTER the time you check them. To alter options for clients already added, you must edit that client's page. This is to enable you to have different options checked for different clients.

Logo (must be gif, jpg, png or bmp)  No file chosen

### Estimate dss file length?

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

For bound jobs... – if you check this box, for most jobs ScribeManager will only allow your typists to upload a transcript if the transcript name matches 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.

Invoice format – choose whether to send your invoices as pdf or Excel documents. (You do not have to invoice via ScribeManager.)

Email invoices from – here, type the email address you want ScribeManager to use to send invoices to your clients. You may want to send them from a specific “accounts” email address, so that if your client replies, their email goes directly to your accounts person.

Email transcripts from – here, type the email address you want ScribeManager to use to send transcripts to your clients.




Attach transcripts to transcript emails to Contacts – when you “send” a finished transcript from ScribeManager, an email goes to the client contact. If you check this box, the transcript will be attached to the email. If the box is NOT checked, the email is still sent, but without the transcript attached, so the email effectively functions as a notification that the transcript is complete and the client contact can log in to their version of ScribeManager to download it. Some of your clients may prefer to download their transcripts rather than receive them by email, as this is more secure. Whatever setting you use for this check box will be used by default for all new client contacts that you add to your ScribeManager account, but you can override the default for individual client contacts, either when adding them or at any time thereafter.

On typist upload, On typist upload, On QC approval – the meaning of these three options should be clear. Whatever options you set here will be used as defaults for all new clients you add subsequently. You can at any time override them for individual clients on that client’s page.

Logo – if you add a logo, your clients will see it on your ScribeManager upload page when sending files to you.

Estimate dss file length? – ScribeManager will display the length of many file formats uploaded to you. For dss files, however, it calculates the length 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.


### Financial Settings

Remuneration Preference*	<input type="text" value="per min."/> 
Billing Preference*	<input type="text" value="per min."/> 
Currency*	<input type="text" value="America (United States of America), Dollars"/> 
\$ Rate	<input type="text" value="1.00"/>
Sales tax %*	<input type="text" value="13"/> If you do not add sales tax, please enter 0 in this field.
Sales tax name*	<input type="text" value="VAT"/>
Invoice Header:*	

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 graphics to be added to your invoices (e.g. your logo, Paypal icon, etc) or would like help with formatting text, please contact us. To preview, click the magnifying glass icon below. Remember that you can add blank lines to improve the line spacing in your invoice.

Note that images appear left-justified. To centre an image you need to adjust the shape of the image. We are happy to assist with this on request.

1 Pike Place  
Seattle  
98101  
United States



Invoice Footer:\*

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

Director: John Smith

Remuneration Preference – here, select the method you normally use to remunerate your typists. You can change it for individual clients or jobs later if you wish.

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

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

Rate – 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 that 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.

Sales tax – 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. In order for this page to save, you must enter a figure here, so if your company never adds sales tax you should enter a rate of zero in the box. Whatever you enter here, you can override it for individual clients and jobs later.

Invoice header – type here the text you want at the top of your invoices (it will appear center-justified on your invoices). For this box and the following one, you can use html code to format text, e.g. bold, underline, text color, etc. You can even add your company logo or other

graphics such as credit card icons using html. Contact ScribeManager Support if you need help with this. If you are not sure yet what text you want, just add something temporary and change it later.

Invoice footer – type here the text for your invoice footer (it will appear left-justified). Then, at the foot of the page, click the magnifying glass for an approximate preview of 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

You are already on ScribeManager as an administrator, but we must now add a typist to your 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 main Quality Controller. The same person can be both CON and QC.

Click Add New User, and we will fill in the details of a typist.







You can either enter a real typist's name (such as your own), or you can temporarily enter a made-up name for the purposes of testing. In the appropriate fields or drop-down menus, select level 5; select the role of "typist"; use your own 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".

ScribeManager will now send an email to the address you have just added, explaining how to set a permanent password for that typist. Follow the instructions in that email.

You should now have two sets of login details, one for the administrator and one for the typist you added.

Now log in as the administrator (not the typist) and click Settings, System Users.

You should see something like this:

System Users						
All		None		All	<a href="#">Add New User</a>	Search...
Admins						
Admins	Login	CON	QC	Role	Active	
 <a href="#">Jane Smith</a>		<input checked="" type="radio"/>	<input checked="" type="radio"/>	Admin	Yes	
Active Typists						
Active Typists	Login	Active	Location	Level	Group memberships <a href="#">manage groups</a>	
 <a href="#">Abigail Adams</a>		Yes		5	Click <a href="#">here</a> to change this user's group memberships	



If you're logged in as the administrator and you want to see what a typist sees when they log in, simply click the magnifying glass beside that typist's name and a new browser window will pop up displaying that typist's version of ScribeManager. Typists see much less information than the administrator sees.

If you click on the typist's magnifying glass now, you will not see any jobs for that typist because none have been added to the system yet.

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.

Enter a real or made-up company name and address; set a Billing Preference, Currency and a Rate (i.e. the rate you intend to charge that client). In the bottom left, under First Contact, 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 real or made-up first and last names, then add your real email address. Then click Save in the top right. You should now see something like this:

Admin Jobs	Client Management	Communications	Invoicing	Reports	Settings	My Account
<div> Edit client: Acme Inc Last saved: 16:25 05-12-20 Created: 08:33 10-07-14 Delete Save </div>						
<div> Company Name *  Acme Inc </div> <div> Country *  United States </div> <div> Address 1  1 Pike Place </div> <div> Address 2  </div> <div> Address 3  </div> <div> City  Seattle </div> <div> State  Washington </div> <div> Post code  </div> <div> Office Phone  </div> <div> Fax  </div> <div> Company Reg. No.  </div> <div> Web site  </div> <div> PDF invoice paper size *  Letter </div>		<div> <b>Client Preferences</b> </div> <div> Hosting location of files  ScribeManager </div> <div> Password-protect transcript downloads?  <input type="checkbox"/> </div> <div> Bound?  Unbound </div> <div> Auto-claim  <input checked="" type="radio"/> Off <input type="radio"/> Per File <input type="radio"/> Per Job </div> <div> Prioritize this client  <input type="checkbox"/> </div> <div> Auto-set level:  1 </div> <div> Auto-set group:  None </div> <div> Auto-set RoR:  </div> <div> On typist upload, automatically send transcript to client  <input type="checkbox"/> </div> <div> On typist upload, automatically set transcript to QC  <input type="checkbox"/> </div> <div> On QC approval, automatically send transcript to client  <input type="checkbox"/> </div> <div> Invoicing preference  Single Invoicing <input type="radio"/> or Collated Invoicing <input checked="" type="radio"/> </div> <div> Email invoices to  info@testcompany.info </div> <div> Remuneration Preference *  per min. </div> <div> Billing Preference *  per min. </div> <div> Estimate dss file length?  <input checked="" type="radio"/> turned off  <input type="radio"/> turned on, default to "normal play" mode  <input type="radio"/> turned on, default to "long play" mode </div> <div> Currency *  America (United States of America), Doll </div> <div> \$ Rate  1.00 </div> <div> VAT %  20.00 </div>			<div> Formatting Doc (max 7 MB)  Choose File No file chosen </div> <div> Billing Notes  </div> <div> Formatting Notes (typist will see)  </div> <div> Client Notes  </div> <div> Allocation Comments  </div> <div> Sending Reminder  </div>	
<div> <b>Contacts</b> <a href="#">[ add contact ]</a> </div> <div> <a href="#">Andrew Adams</a> </div>						

Acme Inc is the “client”, and Andrew Adams is the “contact” at that client company. It will help if you can remember what ScribeManager means by the terms “client” (i.e. the company) and “contact” (the person who works at that company).

Now that we have an administrator, a typist and a client, we can process a real job in ScribeManager. Note that the whole workflow process can be automated in ScribeManager (except for the actual transcription and the QC), but we will first process a job manually so that you can understand the different stages of the workflow process.

## ADDING A JOB TO SCRIBEMANAGER

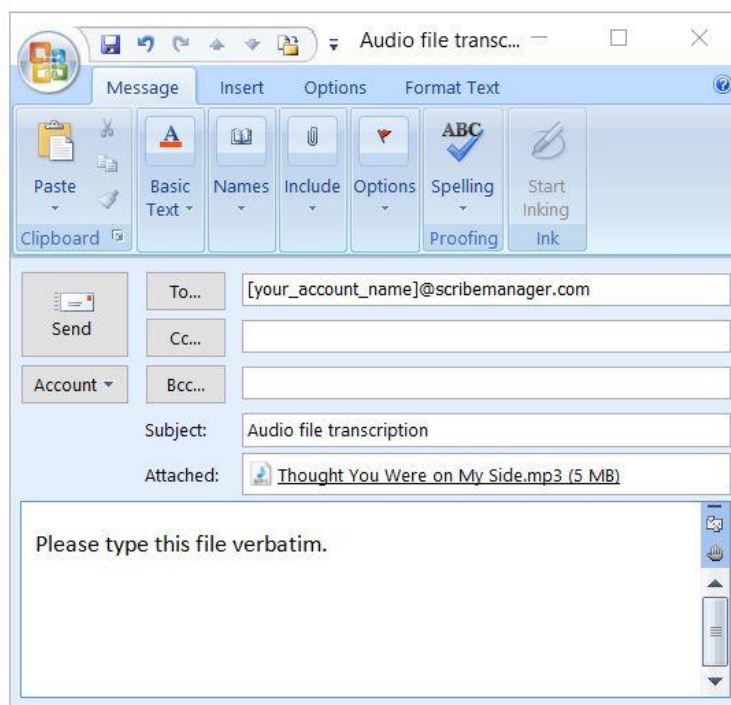
---

Normally it will be your clients rather than yourself who will add audio files to your ScribeManager workflow, but occasionally you may need to do so yourself. For the purposes of this demonstration, you are playing the role of the client by adding an audio file.

There are many ways to add jobs to ScribeManager, for example email, web page upload, telephone dictation, ftp, and URL pasting. The easiest of these is email, which we will use for this demonstration.

Firstly, click on Settings, Company Details and make a note of the “Upload email” displayed near the top of that page. That is the email address you will send files to in order to get them into your ScribeManager workflow.

Now go to your email software, such as Outlook Express, and send an email to that address, attaching a small audio file of less than 10 MB – an mp3 song is ideal (you can download one here: [http://scribemanager.com/test\\_file.mp3](http://scribemanager.com/test_file.mp3) - after loading that page you may need to right-click then select Save Audio As). You can add text to the subject and body of the email if you wish, as in this example:



Now go to your ScribeManager account and click Admin Jobs, Jobs List. ScribeManager checks every few minutes for new files that have arrived by email, so after a short wait you should see your file here as a new job (you will need to reload the page to see it).

If you click on the job number, you will go to the Edit Job page, where you will see the details of the job. Any text you added in the email Subject and Body is in the Upload Comments box. Depending on how busy the system is, it may take a few minutes for the file to process so that its length can be shown, so you may need to reload the page after a while.

So you have now uploaded a job to ScribeManager via email. Email is not the most secure method of uploading, but it is very convenient, and the upload process requires no monitoring, because even if your email software does not successfully send the first time, normally it will continue trying until it succeeds.

On the next page we will continue our demonstration of ScribeManager's workflow process.

## ALLOCATING AN AUDIO FILE

Your Jobs List page should now look something like this:

No.	client	Deadlines	Reference	Job Added	Charge	Fn	Uc	V	Fd	Bound?	Invoice
1887	Acme Inc Andrew Adams	7 12:00 Wed 16th Dec 20 7 12:00 Wed 16th Dec 20		7:10 Wed 9th Dec	\$ 1.00 per min.					Bound	
<div> <div>Transcripts not all produced</div> <div>File</div> <div>Typist Deadline</div> <div>Length</div> <div>Typist</div> <div>Level</div> <div>RoR</div> <div>Mins</div> <div>NTF</div> <div>H</div> </div>											
<div> <div>Filename: Thought You Were On My Side</div> <div>7 12:00 Wed 16th Dec 20</div> <div>00:05:18</div> <div>1</div> <div>\$ 7.?? per min.</div> <div>original [mp3, 5.15MB]</div> <div>converted [mp3, 2.43MB]</div> <div>Play</div> <div>Automatic Timestamps and Speech Recognition</div> <div>Total number of files: 1</div> <div>00:05:18</div> </div>											

The job details are in the light blue band, and the sound file details are in the white section. If the file is of a type that ScribeManager can play, a “PLAY” button is shown. The jagged red waveform is a quick indicator of the clarity of the file (mouse-over the Help button beside the waveform for more information about that).

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 the typist you added.

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. For the purposes of this test job, find the three check boxes on the left of the page (“On typist upload...”, “On typist upload...”, and “On QC approval...”) and ensure they are all UNchecked. Below that, ensure that “Auto-claim” is set to Off. Then scroll to the bottom of the page and you will see the sound file you uploaded. On the “Typist” drop-down menu, allocate the sound file to the typist you added. 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 a rate, then click Save.

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

Audio Files for Job 1887

Add more files | Add url

Cascade first file [-] [+]

Save

File Name	Level	Group	Typist	Typist Deadline	Length	RoR
Filename: Thought You Were On My Side	1	all	Abigail Adams (5)	12:00 Wed 16th Dec 20	00:05:18	0.50 per min.

Play

original [mp3, 5.15MB]

converted [mp3, 2.43MB]

split

Notes to Typist for This File

The background to your file should be peach-colored; background colors will be explained later.



The file is now allocated to the typist. For the next stage of the procedure, we will log in as the typist in order to download the sound file and then upload the transcript.

Typists can of course log in to their own version of ScribeManager via the home page, but if you are the administrator the quickest way to log in as a typist, as we have seen, is to go to Settings, System Users, and click on the magnifying glass beside the relevant typist's name. Please do that now. A new browser window will open, and you will see what the typist sees – provided, that is, you set a permanent password for that typist as outlined earlier. If you did not, you will be asked for that typist's temporary password now. 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 will see what the typist sees when they log in, i.e. something like this:

No.	Sound File	Length	Deadline	Bound?	Pay Rate	Notes	V.	Fd	Upload Transcript
1887	Filename: Thought You Were On My Side <a href="#">original</a> [mp3, 5.15MB] <a href="#">converted</a> [mp3, 2.43MB]	05:18	<span>7</span> 12:00 Wed 16th Dec 20	Bound	0.50 per min.				<button>Upload</button>
Total number of files: 1		00:05:18							

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

At this point the typist would 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 and better quality, because ScribeManager reduces the background noise in it.

Sometimes ScribeManager does not know the length of an audio file, for example when it is an unusual file type. If you want to add the file length into ScribeManager, you can enter it manually as the Admin on the Edit Job page. Alternatively, you can have your typists enter the file length when they have downloaded the file. To turn that option on, go to Settings, Advanced Settings, and check the box “Enable typist to enter file length”.

Because you uploaded this audio file yourself, there is no need to download it, but you can if you wish.

## UPLOADING THE FINISHED TRANSCRIPT


Now create a dummy transcript for upload, titled the same as the sound file, e.g. Thought You Were on My Side.doc


(NB: instead of uploading a transcript, it's also possible to give ScribeManager a URL of a transcript hosted elsewhere, which is useful in situations where your client is obliged to locate their transcripts on a particular server, or in a particular country. This option needs to be turned on by ScribeManager Support.)

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

**Sound file(s) for job 1887 Thought You Were On My Side**

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

Recording quality\*  

Missing words\*  

Comments to client  
(CAUTION: client will see)

**Transcript\***  Thought Yo... My Side.doc

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	V.	Fd	Upload Transcript
1887	Filename: Thought You Were On My Side <a href="#">original</a> [mp3, 5.15MB] <a href="#">converted</a> [mp3, 2.43MB]	05:18	<span style="background-color: green; color: white;">7</span> 12:00 Wed 16th Dec 20	Bound	0.50 per min.				<a href="#">Thought You Were on My Side.doc</a> Uploaded 09.12.20 07:20
Total number of files: 1		00:05:18							

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

No.	client	Deadlines	Reference	Job Added	Charge	Fn	Uc	V	Fd	Bound?	Invoice
1887	Acme Inc	7 12:00 Wed 16th Dec 20		7:10 Wed 9th Dec	\$ 1.00 per min.					Bound	
Transcripts produced	Andrew Adams	7 12:00 Wed 16th Dec 20									
File	Typist	Deadline	Length	Typist	Level	RoR	Mins	NTF	H		
Filename: Thought You Were On My Side	7	12:00 Wed 16th Dec 20	00:05:18	Abigail Adams	1	\$ 0.50 per min.	5				
original [mp3, 5.15MB]											Thought You Were on My Side.doc
converted [mp3, 2.43MB]											Uploaded
Play											
Automatic Timestamps and Speech Recognition											
Total number of files: 1			00:05:18			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, so is now being held within ScribeManager (it has also been emailed to the CON's email address).

## SENDING A TRANSCRIPT TO A CLIENT

As mentioned above, when a typist uploads a transcript it is also sent to the CON (the main administrator) by email, which has the effect of alerting the administrator that a transcript is complete (we can turn this email off at your request). To get the transcript to the client, you could simply forward them that email from your email software such as Outlook, but if you do that, ScribeManager will have no record that the transcript was sent to the client. It is better to send the transcript from within ScribeManager, as we will now see. (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, nothing is lost – you simply move to another computer (e.g. your laptop, smartphone, Internet café), then log in to ScribeManager and pick up where you left off.)

To send 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.

On this page you can download the transcript and check it if you like.

On the left in the blue box you will see various options. Click “I want to send this transcript to the client.” You should now see something like this:

### Transcript History:

- ☐ I want to delete this transcript without giving feedback to the typist.
- ☐ I want to set this transcript for quality control.
- ☐ The transcript has been QCed and I want to reject it, with the option to feed back to the typist.
- ☐ The transcript has been QCed and I want to approve it, with the option to feed back to the typist.
- ☒ I want to send this transcript to the client.


To:	<input type="text" value="info@testcompany.info"/>
CC to:	<input type="text"/>
BCC to:	<input type="text"/>
Subject	<input type="text" value="Transcript: Thought You Were on My Side.doc (ref. )"/>
Comments to client:	<div><p>To: Andrew Adams</p><p>Your transcript has been completed.</p><p>Transcript cost: USD 5.00</p><p>Client contact email: info@testcompany.info</p><p>Transcript title: Thought You Were on My Side.doc Recording quality: Good Comments to client: Words missing: Some words could not be made out Audio minutes: 5</p><p>To download this transcript, or to log in and see the progress of your work, please visit: <a href="https://secure.scribemanager.com/download.php?tid=9a576a230094040d0b8489fa493fba1d">https://secure.scribemanager.com/download.php?tid=9a576a230094040d0b8489fa493fba1d</a></p></div>
	<div>Send</div>

Here you can edit the email that will go to the client. You can edit the destination email address, or add multiple email addresses separated by commas or semi-colons. 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 you have just processed is no longer visible on the default view, because the default is to show only UNfinished jobs, and now that you have sent the transcript to the client, this job counts as finished for workflow purposes. But we still need the 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 that the page will display jobs whose transcripts have all been sent to the client.

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 bother looking 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:

No.	client	Deadlines	Reference	Job Added	Charge	Fn	Uc	V	Fd	Bound?	Invoice
1887	Acme Inc All Sent, Ready for Invoicing	7 12:00 Wed 16th Dec 20 7 12:00 Wed 16th Dec 20		7:10 Wed 9th Dec	\$ 1.00 per min.					Bound	Create Invoice
File											
Filename: Thought You Were On My Side		7 12:00 Wed 16th Dec 20	00:05:18	Abigail Adams	1 \$ 0.50 per min.	5					Thought You Were on My Side.doc Sent to Client
original [mp3, 5.15MB] converted [mp3, 2.43MB]											
Play 											
Automatic Timestamps and Speech Recognition											
Total number of files: 1			00:05:18		5						

## 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 the words “Create invoice” on the right in blue. You should now see something like this:

### Create invoice

#### Billing info for job #1887


**Company:** Acme Inc  
**Contact:** Andrew Adams  
**Send to Email:** info@testcompany.info  
**Include in invoice:** ☒ **Only current job - #1887**  
☐ All finished jobs for this company (i.e. where the status of the transcripts is "Sent to client")

Enter Invoice No.

Create invoice(s)

Enter an invoice number, e.g. 123, and 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	1887	Acme Inc	Andrew Adams	info@testcompany.info	6.00	

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 info@testcompany.info

Proceed

You can preview the invoice by clicking on the magnifying glass icon. It will show a rough approximation of the invoice, not an exact rendering. If you wish to alter the invoice header or footer, you can do so by going back to Settings, Company Details.



Note that ScribeManager does NOT store your invoice, so for your accounts records you will probably want to download it to your computer, which you do by selecting “download the invoice” and clicking Proceed. When you have it safely on your hard drive, send 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 emailed to the client. ScribeManager copies you in on that email, so you have another record of the invoice.

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 saw a job going 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 the system’s 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.

## SPEECH RECOGNITION

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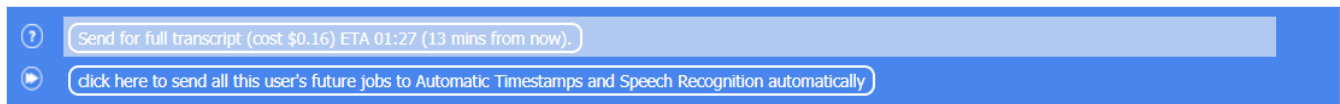
ScribeManager's speech recognition function is optional, and is charged in addition to normal ScribeManager fees.

Speech recognition technology is in its infancy, therefore it is likely to work well only with very clear audio files. Unclear files are likely to produce unusable transcripts. The determination of whether a file is clear enough to be sent for speech recognition must be made by you.

Files that ScribeManager can process with speech recognition display this icon:

Automatic Timestamps and Speech Recognition

Click that to see the following options:



ScribeManager displays the cost of sending the recording for speech recognition, and the Estimated Time of Arrival, which is normally the recording length plus a few minutes.

An option exists for ScribeManager to show you a speech-recognized version of the first 30 seconds of the recording, known as a "partial transcript". You can use this to assess whether to send the entire recording for speech recognition. This option is turned off by default, but it can be turned on by request. There may be a charge. If a partial transcript exists, you can view it by floating your mouse over this image:

Partial transcript 

The remainder of the speech recognition process is self-explanatory when used.

## UPLOADING AUDIO FILES BY WEB PAGE UPLOAD

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We saw earlier how to send files into ScribeManager by email. Email has the advantages of simplicity and familiarity, which your clients may appreciate in situations where they are hard pressed! Another advantage is that this method may require no monitoring, because if your client is using a desktop email client such as Outlook, and their computer crashes or their Internet goes down while sending, Outlook will normally continue to try to send the email until it succeeds.

However, sending by email has two disadvantages. Firstly, it is unsuitable for large files. ScribeManager restricts attachments to a maximum of around 25 MB, because not all mail servers can reliably process files larger than that. Secondly, sending by email is less secure.

For the above reasons, the most common method of uploading files into ScribeManager is not email but web page upload. This method is very secure and is suitable for large uploads, but your client may need to monitor it – if their bandwidth stops or their computer crashes, they may need to physically start the upload again.

To upload securely via your bespoke web page, your clients simply go to your upload URL (displayed on your ScribeManager account under Settings, Company Details), and then they follow the instructions. On that web page they can also log in to their own version of ScribeManager and view and download their files.

You can configure the appearance of your web upload page by going to your Company Details page and setting a font and background color and by adding a logo, and you can edit the text on that page by going to Settings, Edit Messages.

If a client uploads a file to you via your web page, it will appear immediately in your ScribeManager account in exactly the same way as if the client had uploaded by email.

## 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 send the transcript 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, allocate manually.
yellow	PRIORITIZED	The sound file must be claimed before all other files.	...it is your job to allocate. If no typist claims, 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". Use unbound jobs with caution.

# SETTING TYPIST REMUNERATION AUTOMATICALLY

It is possible with ScribeManager to pre-set a Rate of Remuneration (RoR) for a typist so that every time you allocate to that typist, the same RoR is used. Go to Settings, System Users, and then click on a typist's name.

Abigail Adams

First Name \*

Abigail

Last Name \*

Adams

Active

☒ Yes

Level

5

Role \* ?

Typist

Email \*

info@testcompany.info

Birth Date

DD | MM | YYYY

Gender

☐ Male ☐ Female

Languages ?

English

Country

None

Address 1

Address 2

Address 3

City

State

None

Post code

Typist Notes

SMS number ?

Direct tel

Home

Mobile

Skype

MSN

AIM

Personal Page

Pay rates

Per Minute

.50

Per Word

Per Line

Per Hour of Work

Flat Rate

Eligible for Autoclaim?

☒ Yes

Under “Pay rates” are five remuneration boxes where you can fill in rates of remuneration for this typist according to some of the many different methods ScribeManager supports. For example, if the rate of remuneration for 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 automatically. 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 (see chapter “Auto-Claim”), 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.



## 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 ten typists, you could do the following:

- create a typist group called "night shift" and put your 4 night shift typists into it
- create a typist group called "Australia" and put your 8 Australia-based typists into it
- create a typist group called "medical" and put your 7 medically-trained typists into it

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

You could use the Typist Group facility in the following ways:

- if you are working the night shift and an urgent audio file comes in, you can set it to the "night shift" group, so that only the typists who are currently available appear in the allocation drop-down menu.
- if a file comes in from an Australian client, you can set it to the "Australia" group, so that only Australian typists, who are more familiar with Australian accents, will appear in the allocation drop-down menu.
- if a medical file comes in, set it to the "medical" group so that it can be allocated only to medically-trained typists.

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

For greater automation you can link a particular client with a particular group, so that when a job comes in from that client, it will be automatically linked to the group you have set, and the files can then be allocated only to the typists in that group. You could even name the group according to the client's company name. Clients often specify that only typists who are specifically trained for their work should do it, and the Typist Group feature makes that an easy requirement to meet. To link a client with a typist group, go to Client Management, Clients, click on the client, and then choose a group on the "auto-set group" dropdown.

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

# 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 be used whenever a new job for this client is added (although you can change it for individual jobs).

Add Client
Save

Company Name \*
Country \*
Address 1
Address 2
Address 3
City
State
Post code
Office Phone
Fax
Company Reg. No.
Web site
PDF invoice paper size \*

None
None
None
None
None
None
None
None
None
None
None
None

Hosting location of files
Bound?
Auto-claim
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

ScribeManager
Bound
Off
Per File
Per Job
Prioritize this client
None
None
None
None
None
None
None

Invoicing preference
Email invoices to
Remuneration Preference \*
Billing Preference \*
Estimate dss file length?
Currency \*
\$ Rate
VAT %

Single Invoicing
or Collated Invoicing
per min.
per min.
turned off
turned on, default to "normal play" mode
turned on, default to "long play" mode
America (USA), Dollars
1.00
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Formatting Doc (max 7 MB)
Choose File
No file chosen
Billing Notes
Formatting Notes (typist will see)
Client Notes
Allocation Comments
Sending Reminder

First Contact
First Name \*
Last Name \*
Email \*
Attach transcript to transcript emails to this Contact
On login, show colleagues' jobs

Automatic Timestamps and Speech Recognition (optional)
Language
Timestamps
Send automatically

Other
Direct Tel.
Home Tel.
Skype
MSN
AIM
SMS number

Below are explanations of the fields on this page.

**Company Name** – Enter the client’s details carefully, because they will appear on your invoices to the client.

**PDF invoice paper size** – set invoices to Letter size or A4, depending on the client’s location (e.g. Letter size for USA, A4 size for the UK).

**Hosting location of files** – Set a location for the client’s audio files and transcripts to be stored. During your trial period, you can only store material on ScribeManager, but for regular users, many locations worldwide are possible. Those locations enable clients to upload much larger files, of up to 20 GB. Also, clients may require you to ensure their material is stored in a particular jurisdiction. See the chapter “Worldwide Storage” for more information.

**Auto-claim** – Auto-claim enables eligible typists to claim work for themselves without you having to allocate it to them. See the chapter “Auto-claim”.

**Auto-set level** – if this client always uploads files of the same level of difficulty, set that level here (5 = most difficult), so that all files they upload are automatically set to that level.

**Auto-set group** – if you want this client’s work to be done only by typists in a particular group you have created, select that group here.

**Auto-set RoR** – 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. However, if you subsequently allocate to a typist for whom a Pay Rate is set, that pay rate will overwrite the figure in Auto-set RoR.

**“On typist upload...”** – by default these three options are set to whatever options you chose on the Company Details page. If you wish you can now override those default settings for this client.

**Invoicing Preference** – 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. (You do not have to use ScribeManager’s invoicing feature.)

**Email invoices to** – by default, invoices are emailed to the individual client contact who uploaded the work. If that person wants the invoices 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.

**Formatting Doc** – if you upload a document here, it will be added to all this client’s jobs and will appear to all typists who do this client’s work. You can use this facility to provide templates, vocab lists, etc. You can upload any file type including a zip.

**Billing Notes** – 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".

**Formatting Notes** – 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.

**Client Notes** – 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.

**Allocation Comments** – 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.

**Sending Reminder** – add here any notes about this client's requirements regarding the sending of 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.

**Edit job 1883** (Transcripts not all produced)
 Last saved: 11:21 08-12-20
 [Change to Deleted Status](#)
[Save](#)

Job Number: 1883
 Hosting location: ScribeManager
 Client \*: 
 Contact \*: 
 Client Reference: 
 Client Deadline: 
 Internal Deadline: 
 Bound?: 
 On typist upload, automatically send transcript to client: ☐
 On typist upload, automatically set transcript to QC: ☐
 On QC approval, automatically send transcript to client: ☐
 Estimate dss file length?: ☒ turned off ☐ turned on, default to "normal play" mode ☐ turned on, default to "long play" mode
 Auto-claim: ☒ Off ☐ Per File ☐ Per Job
 Prioritize: ☐

Client formatting doc: None
 Vocab doc (max 7 MB):  No file chosen
 Remuneration Preference\*: 
 Billing Preference\*: 
 Currency\*: 
 \$ Rate\*: 
 VAT %: 20.00
 Postage: 
 Courier: 
 Other Charges Amt: 
 Other Charges Desc.: 
 Billing Notes: 
 Upload Comments:

Formatting Notes (typist will see): 
 Client Notes: 
 Allocation Comments: 
 Sending reminder: 
 Notes to self re this job:

**Audio Files for Job 1883**
[Add more files](#) | [Add url](#)
[Cascade first file](#) [-] [+] [Save](#)

File Name	Level	Group	Typist	Typist Deadline	Length	RoR
Filename: Thought You Were On My Side	<input type="text" value="1"/>	<input type="text" value="all"/>	<input type="text" value="Abigail Adams (5)"/>	<input type="text" value="12:00 Fri 11th Dec 20"/>	<input type="text" value="00:04:11"/>	<input type="text" value="0.00"/> per min.
Notes to Typist for This File: <input type="text"/>						
Play <a href="#">original</a> [mp3, 5.15MB] <a href="#">converted</a> [mp3, 2.43MB] <a href="#">split</a>						

Client – if you select a different client from the drop-down menu, the new client’s default information will appear in all other fields on this page.

Client deadline – you can set a client deadline, also an earlier company-internal deadline, and also, beside each sound file, an even earlier typist deadline.

Bound? – usually, 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 containing the content of both of them, is called an “unbound” job. Working with unbound jobs is advisable only for experienced users of ScribeManager. See the chapter “Unbound Jobs”.

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On typist upload – these three settings appear set to the default for this client, but on this page you can override the default and make a setting just for this job. If you are expecting a transcript to be completed in the middle of the night, to save you logging on to ScribeManager and sending it to the client manually, just check the first box.

Auto-claim – briefly, Auto-claim means that suitable typists can claim files without you needing to allocate to them, but for a fuller explanation see the chapter “Auto-claim”.

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

Other charges – to add an extra charge to the invoice for this job, enter the amount and the description, e.g. “proof-reading” and “50”. This will appear on your invoice to the client for this job. It can be a negative number, meaning that you are subtracting an amount, e.g. “Discount” and “-50”.

Upload comments – in this box you will see the comments the client typed when uploading the job to you. Note that the typists do NOT see the comments in this field, because it is often inappropriate for typists to see unedited client comments. If you want the typists to see them, you need to copy and paste them into the Formatting Notes field, rewording if necessary.

Add more files – click this to manually add more sound files to this job.

Add URL – click this if you want to add to the job not sound files but URLs of sound files hosted elsewhere. When added to ScribeManager, they look like sound files that are on ScribeManager but in fact if you click to download them they download from elsewhere. See the chapter “Adding URLs” for more information.

Rename – click on the “rename” link if you want to rename a file (for example if it contains a spelling error). Renaming is only possible if the file is unallocated.

Level – here you can set the level of difficulty for this file if you wish. 1 = easiest, 5 = most difficult. It’s normally possible to allocate only to typists who have been set to that level of ability or higher.

Group – here you can set a group for this file if you wish. If you do, 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.

Notes to typist for this file – 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.

Length – 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. (You can also have your typists enter the file length when they have downloaded the file. To turn that on, go to Settings, Advanced Settings, and check the box “Enable typist to enter file length”.)

RoR – here you can add or edit the rate of remuneration you will pay to the typist who is transcribing this file.

Cascade first file – 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), saving you a lot of repetitive work.

“+” and “-” – each time you click these buttons, the RoR for all unallocated files will be raised or lowered by 1. 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”.

## SENDING EMAILS AND SMS MESSAGES TO YOUR STAFF

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Go to Communications, Contact Staff. This page enables you to send emails and/or sms messages to your staff quickly. This feature is useful when a high volume of urgent work comes in and you have to alert all your typists to stand by, or find out who is available.

The sms facility on this page is deactivated by default. To activate it, please contact ScribeManager Support.

Sending emails from ScribeManager is free, but there is a charge for sending sms messages. When you select to send by sms message, you will see a disclaimer; please read it carefully.

In order for an sms message to reach its destination, you need first to have entered the recipient's number into ScribeManager, formatted correctly. To do this, go to Settings, System Users, and click on the relevant user. In the field "sms number", enter their cellphone number with no spaces and including the country code, e.g. 44123456789.

All sms messages will be charged for by ScribeManager whether delivery succeeds or not, so we advise that you send test messages to each user before using this facility to any significant degree. Note that even if you have entered the recipient's number correctly, delivery is not guaranteed by ScribeManager, because it has no control over the sending of the message by the third party provider, nor over the telephone company that receives the message and transmits it to the recipient's handset. ScribeManager also has no way of verifying whether an sms message is received or not.

Important: the charge for the sms message feature is per recipient, not per message; therefore, if you send one message to five users, you incur the charge x 5.



## QUALITY CONTROL

---

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

You can have as many Quality Controllers as you wish.

Go to Settings, System Users, and click Add New User, then click on the “Role” drop-down menu, where you will see three roles. Any user you set as “Admin” or “Restricted View” can do QC. Admins see all client information, but client information is hidden from “Restricted View” users. Restricted View is therefore a good role to set for your QC people if you do not want them to see client identities.

Although all administrators and Restricted View users can do QC, only one user can be set as the head QC person. That simply means that when a transcript is set to QC or when QC feedback is given, the head QC person is notified by email. To set the head QC person, go to Settings, System Users and click beside the appropriate user in the “QC” column. You can change that to a different person at any time, so if one QC person goes off duty and another one comes on duty, they simply click beside their name and QC emails will come to them.

You do not have to set any transcripts to QC if you do not wish to. If you are a solo typist, you are unlikely to need the QC facility.

Many transcription companies want all their transcripts to be automatically set to go through a QC process. This is easy with ScribeManager. When you set up your ScribeManager account, on the Company Details page check the box marked “On typist upload, automatically set transcript to QC”. All clients who you add from then on will have that option checked by default.

If you want some clients’ transcripts to go to QC automatically and not others, then on each client’s page simply check or uncheck that same option, and when those clients add jobs, those jobs will have those options checked or unchecked automatically.

If a job is not set to go to QC automatically, you can still set a transcript to QC manually. Simply 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.”

Transcripts that have been set to QC appear on the Jobs List page with a brown background, so that your QC person can find their jobs quickly by looking for the color brown.

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

When a transcript is rejected its background goes red.

When a transcript is approved its background goes pink. At that point it can be manually sent to the client from the Manage Transcript page. Or you can set transcripts to be sent to the client automatically on QC Approval, by checking the box “On QC approval, automatically send transcript to client”, which appears on the Company Details page, on each client page, and on each job page.

Reminder: if you check that box on the Company Details page, it does not change that setting for all existing clients – it only sets it for clients whom you add after that time. Existing clients’ settings are unaffected. Similarly, if you change that setting on a client’s page, it does not change that setting for all that client’s existing jobs but only for jobs from that client that are added after that time.

When you set a transcript to QC, or reject or approve it, typists are informed of that fact by email. You can fill in a feedback field to the typist when rejecting or approving. 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 head QC person and the typist.

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

## BULK INVOICING

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In the earlier chapter “Basic Invoicing” we saw one way to create an invoice, which was by clicking “Create Invoice” on the Jobs List page. 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.

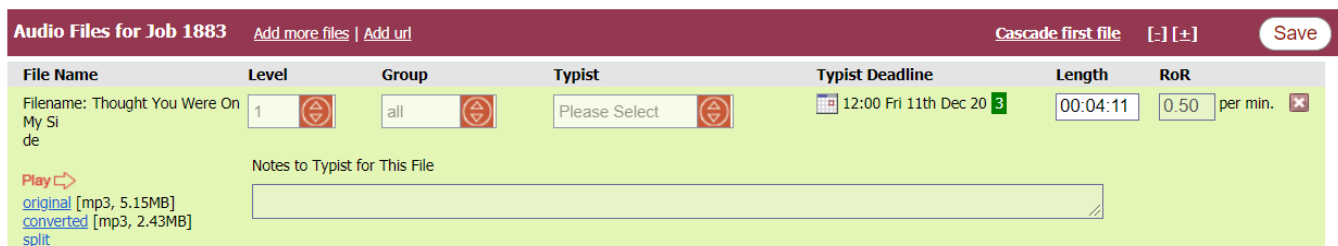
## AUTO-CLAIM

ScribeManager's Auto-claim feature is a way of enabling typists to claim work for themselves without you having to allocate it. This is a powerful feature that can save you a huge amount of time. Instead of you having to constantly contact all your typists to find out their availability so that you can allocate manually, you have the alternative of simply setting files to Auto-claim and letting typists claim files for themselves.

When a sound file is set to Auto-claim and is waiting to be claimed, it will appear on the ScribeManager pages of all appropriate typists, i.e. all those who are of the required level or above and who are in the appropriate typist group. Typists see up to five auto-claim files at a time but can only claim one (this is to prevent one typist from grabbing too many). Once they have uploaded the transcript for that sound file, they can claim another sound file.

Typists have to claim files in order of difficulty and earliness of deadline.

Files that are eligible for auto-claim have a green background, as per the example below, until claimed.



**Audio Files for Job 1883** [Add more files](#) | [Add url](#) [Cascade first file](#) [-] [ +] [Save](#)

File Name	Level	Group	Typist	Typist Deadline	Length	RoR
Filename: Thought You Were On My Side <a href="#">Play</a> <a href="#">original</a> [mp3, 5.15MB] <a href="#">converted</a> [mp3, 2.43MB] <a href="#">split</a>	1	all	Please Select	12:00 Fri 11th Dec 20	00:04:11	0.50 per min.

Notes to Typist for This File

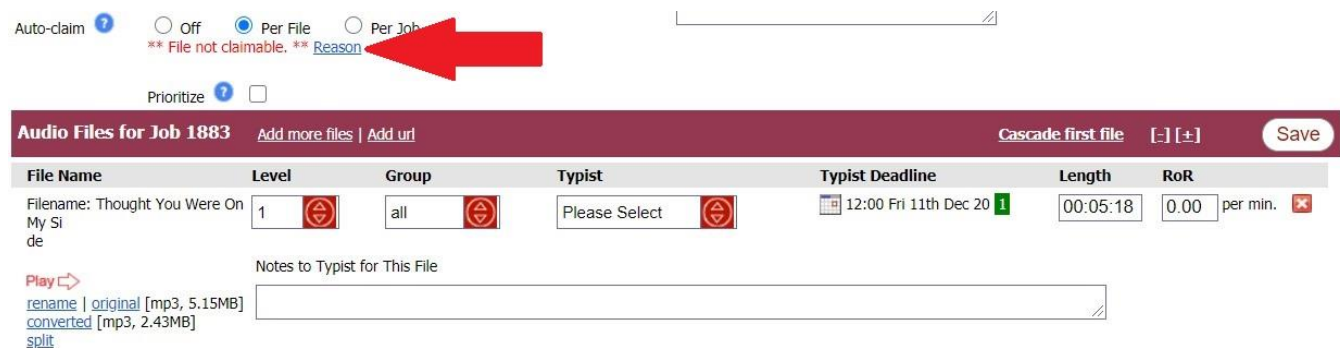
For a sound file to be eligible for auto-claim, the following criteria must be met:

- "Auto-claim enabled" must be set to "Yes" for that job
- the level, deadline, file length and RoR must be set
- the sound file must be unallocated
- the Upload Comments field (on the Edit Job page) must be blank
- note that typists must be set to a level in order to see Auto-claim files, and they can only see files which are of their level or below. If the files are set to a typist group, only typists in that group will see those files.

That may look like a lot of criteria, but in fact they can all be automated. If on the client's page you have previously set "Auto Claim" to "Per File" or "Per Job" and filled in "Auto-set level" and

“Auto-set RoR”, and if the client uploads files without any comments in a file format that ScribeManager can time, and if they set a deadline when uploading, then as soon as that client uploads files, they will automatically be eligible for Auto-claim. In that situation, you as the CON administrator not only have no need to allocate but in fact you have no need even to be aware of the job at all until the transcripts are produced – and if you set the transcripts to go automatically to the client, you never need to be aware of the job at all! See also the chapter “Automation”, which explains the full possibilities for automation.

If you have turned on Auto-claim but the background of a file is not green, it is because one or more of the criteria for Auto-claim is not fulfilled. To see which, float your mouse over “Reason” – see the screenshot below.



When a typist is eligible to claim an Auto-claim file, they simply click on the “Claim” button beside it. It then disappears from all other typists’ views and is shown on that typist’s ScribeManager account with part of the background still green. The typist will be unable to see or claim any more Auto-claim files until they have uploaded the transcript for the current auto-claimed file.

You can disable an individual typist from eligibility for Auto-claim by going to Settings, System Users, clicking on that typist, and unchecking “Eligible for Autoclaim?”.

Auto-claim can be set to either Per File or Per Job. The former means that typists claim one file at a time. The latter means they must claim the entire job, which can be useful if all the files in the job must go to just one typist, for example if the client uploads an audio file and a template. Note that in that particular situation you may need to set the job as Unbound (see the chapter “Unbound Jobs”).

If you check the Prioritize box, files from this job will have to be claimed before all other non-prioritized Auto-claim files, even if they have earlier deadlines. Prioritized files are yellow, not green. The Prioritize feature is useful if an emergency job arrives.

## SPLITTING FILES

---

ScribeManager's "Split" feature enables you to split an audio file among more than one transcriber, which is useful if the file is long and the deadline is close. Normally you will want to "string together" all the part-transcripts to produce a complete transcript to send to the client.

In order to avoid confusion, you must read this page carefully to ensure you understand exactly how the Split feature works.

Imagine you have an audio file that is 03:25:34 in length, and you want to split it into four "sub-files", and allocate one each to four typists. Go to the job's Edit Job page, and beside the audio file you want to split, click "Split". It will not be visible if the file has no length, so you may need to first add the length and save the page.

After clicking Split, you will be taken to the "Split File" page, where you select the number of sub-files to split the original file into – four in this case – then click Go.

You are then presented with the names of the four new sub-files. On the right of the page, you will see that ScribeManager by default assumes that each of the four typists will transcribe sections of roughly equal length, but you can change this if you like.

Click Proceed, and you will be taken to the Edit Job page, where you will see the new sub-files as part of the job.

**IMPORTANT:** ScribeManager cannot actually split the original sound file, so the links beside each sub-file still download the ENTIRE original file, but obviously each typist should only transcribe their section. To ensure they do not inadvertently transcribe the entire file, ScribeManager inserts text in each sub-file's NTF field (NTF = Notes to Typist for this File) which tells each typist exactly which section of the file to transcribe, with a 10-second overlap.

You can now allocate the sub-files to typists. Do NOT allocate the original file to a typist.

When a typist uploads a part-transcript, you can if you wish send it to the client, but you will more usually want to wait till all the part-transcripts are uploaded, then "string" them into one, then upload the complete transcript against the ORIGINAL audio file. You cannot upload a transcript as an administrator, but you can create a dummy typist, then allocate the original file to that typist, then upload the transcript as that typist, then send it to the client. When you send it, you will see that all the part-transcripts for the corresponding sub-files change to "Sent" status, so that the job is regarded as finished and can be invoiced.

The administrator who strings together and uploads the complete transcript has transcribed nothing so cannot claim anything when uploading. The total number of minutes transcribed by

all the typists will equal the original file length. Thus the correct total number of minutes is used to invoice the client, and each typist's Transcription Record shows the number of minutes they actually transcribed.

Note: Audio files in unbound jobs cannot be split.

Note: If a job is set to send transcripts to the client automatically on typist upload or QC approval, and you then split a file, ScribeManager will UNcheck those boxes automatically, in order to prevent part-transcripts from being inadvertently sent to the client. If you DO want to send part-transcripts to the client automatically, simply check those boxes again and save the page.

Note: ScribeManager will not let you rename or delete the original or split files.

# USING SCRIBEMANAGER TO REDUCE YOUR SPEND ON TYPISTS

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With ScribeManager, you should be able to reduce your spend on typists by 10-20% with relative ease.

Imagine you currently remunerate your typists at a rate of US \$0.75 per minute of recording. In practice that rate is probably a blunt instrument, and all your typists will have different levels of satisfaction with it. Their personal circumstances will also vary from day to day, and the rate at which they are willing to work will in effect vary constantly. With ScribeManager you can make use of these continually “shifting sands” to ensure that work goes to those typists who are willing to work for the most competitive rates at any particular time.

The way you achieve this is by setting jobs to Auto-claim at lower rates of remuneration, and then gradually raising rates until individual typists judge it worthwhile for them to claim the files.

ScribeManager enables you to quickly and easily raise rates of remuneration for a job by using the “[-] [+]” controls on the Edit Job page:



Cascade first file [-] [+]

Each time you click “[+]”, the rates of remuneration for all unallocated files in that job rise by 1. (Rates of remuneration for allocated files do not change.) After the change, you must save the page.

Here is an illustration of how you might use this feature. Assume you have a job of six 1-hour audio files, and you pay your typists \$0.75 per minute. Normally you would pay a total of \$270 to your typists (360 minutes x \$0.75). However, if you use ScribeManager’s “+” and “-” controls, you could cut that cost in this way:

1. Set the files to auto-claim at a low rate of, say, \$0.55 per minute.
2. One hour later, you see that no files have been claimed, so you raise the rate to \$0.58.
3. One hour later, you see one file has been claimed, but since you still have five more files to allocate, you raise the rate to \$0.60.
4. One hour later, you see another file has been claimed, but as four more remain, you raise the rate to \$0.65.



5. One hour later, you see all files have now been claimed. In this instance, the average rate you paid was \$0.63 instead of \$0.75, meaning a total saving for this job of \$43.20 (a 16% saving).

If you feel files are being claimed too quickly, you can lower rates using the “[`-`]” command. Conversely, if your company is very busy and you need to incentivize typists to claim more work than usual, you can use this facility to raise rates of remuneration higher than they would normally be.

## YOUR CLIENTS' ACCESS TO SCRIBEMANAGER

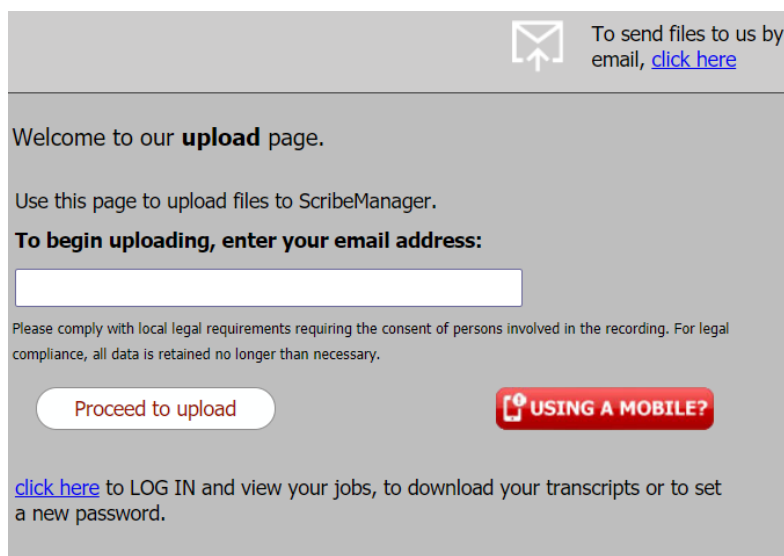
---

Your clients can also log in to ScribeManager, though they do so not via the ScribeManager home page but via the same web page where they upload sound files to you.

Obviously your clients do not see all the information that you see – they see only what they need to see. They can also 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 completed transcript 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 more secure to receive transcripts by download than by email. If you would like your clients to obtain transcripts only by download and not by email, ScribeManager Support can 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 use that option, click Client Management, Clients, then click the client company name, then the contact name, then uncheck the box marked “Attach transcript to transcript emails to this Contact”.

To get login details for ScribeManager, clients go to the upload page then click on “click here to view your current jobs”, as shown below.




The screenshot shows the ScribeManager upload page. At the top right, there is a mail icon and the text "To send files to us by email, [click here](#)". Below this, the page says "Welcome to our **upload** page." and "Use this page to upload files to ScribeManager." It then prompts the user to "To begin uploading, enter your email address:" with a text input field. A disclaimer follows: "Please comply with local legal requirements requiring the consent of persons involved in the recording. For legal compliance, all data is retained no longer than necessary." There are two buttons: "Proceed to upload" and "USING A MOBILE?". At the bottom, it says "[click here](#) to LOG IN and view your jobs, to download your transcripts or to set a new password."

ScribeManager lets you 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. You should see something like this:

Audio Files

Change Password

Upload more files

Job No.	Sound File	Upload Status	Length	Time of upload	Deadline	Job Status	orig sound file	download mp3	Transcript Status	Transcript	Report	Days till deletion
1887	Thought You Were On My Side	UPLOADED	05:18	7:11 Wed 9th Dec	12:00 Wed 16th Dec 20	All Sent, Ready for Invoicing	<a href="#">download (5.15MB)</a>	<a href="#">download (2.43MB)</a>	Sent to Client	<a href="#">download transcript</a>		74
Total:	1	Total:	05:18									

## EDIT MESSAGES

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If you go to Settings, Edit Messages, you will see several 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

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ScribeManager's search boxes require a word of explanation.

If there is no "Search" button beside the box, you simply type into it, and results will appear as you type. You must start typing from the beginning of the search term; for example, if you are searching for "interview", start typing "interv...", not "ntervi". Note that ScribeManager does not search all fields, as that would be too slow and 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, typist 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

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

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 all your files, they will all be set to the same level, and 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. However, you are almost certain to want to automate some of your work.

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. (Note that that figure will be overwritten if you subsequently allocate to a typist for whom a Pay Rate is set.)

To automate file timing, ensure your clients send in a file format ScribeManager can time, such as mp3.

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 Rate 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 force clients to set deadlines), go to the Company Details page and select "show calendar – deadline required".

To automate the setting of files to Auto-claim, you need first to set Automate RoR and Auto-set level for that client, and Enable Auto-Claim must be set to "Per File" or "Per Job" for that client. You must also ensure the client sends 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 need to go to the Edit Job page and fulfil all the criteria.

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. Whatever way 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 that time onwards (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 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.

## UNBOUND JOBS

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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 the contents of both files typed into just one transcript.

Be aware that processing unbound jobs is not as straightforward as processing bound jobs, for various reasons. 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 if the transcript they are uploading is their last one for that job.

Processing unbound jobs can be complex so only experienced users of ScribeManager are advised to use them. 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. Note that you cannot save a job as Unbound if any files for that job are already allocated, or if the Billing Preference is “flat fee”, or if Auto-claim is set to “Per File”.

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

ScribeManager assumes the whole job is finished only when all the “typist finished” drop-down menus are set to “yes”. In certain circumstances 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
1409	Acme Inc Andrew Adams	7 12:00 Mon 24th Jun 19 7 12:00 Mon 24th Jun 19		9:59 Wed 29th May	\$ 1.00 per min.					Unbound	
Transcripts not all produced											
File	Typist	Deadline	Length	Typist	Level	RoR	Mins	NTF	H	Batch-manage transcripts	
Filename: The Wild Places <a href="#">original</a> [mp3, 4.35MB] <a href="#">converted</a> [mp3, 2.18MB] <a href="#">Play</a>	Abigail Adams	7 12:00 Mon 24th Jun 19	00:04:45	 U	1	\$ 0.50 per min.				<a href="#">transcript 1.docx</a> Uploaded  <a href="#">transcript 2.docx</a> Uploaded  typist finished? no	
<a href="#">Assess clarity for Google speech recognition</a>											
Total number of files: 1			00:04:45	8							

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.



## WORLDWIDE STORAGE

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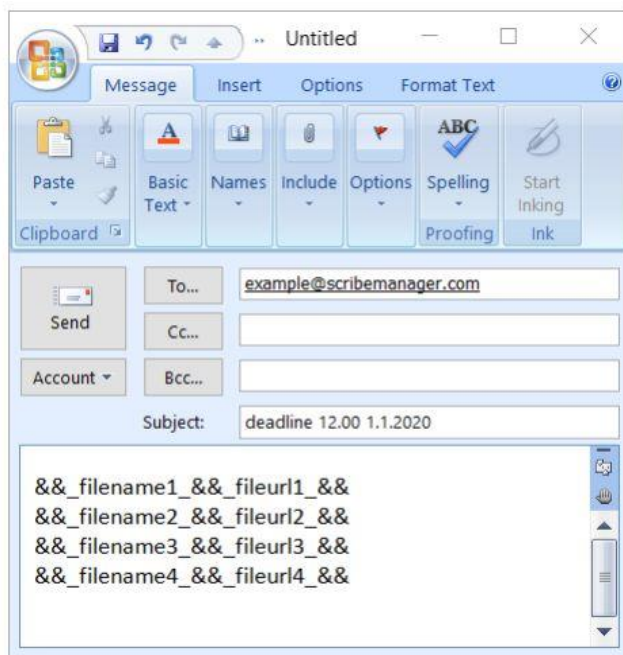
We saw earlier on ScribeManager's Company Details page that you can set a "Default file hosting location". Use this setting to determine where your clients' audio files and transcripts are stored. You can choose different locations for individual clients. Clients often stipulate that their audio files and transcripts must be stored in a particular geographical location.

## ADDING FILES TO SCRIBEMANAGER – METHOD 1: EMAIL

---

You can add audio files to ScribeManager in several ways. The easiest way is by sending them to your account as an email attachment, which we saw earlier in the chapter “Adding A Job to ScribeManager”.

Aside from email attachments, email can be used in another very effective way to add jobs to ScribeManager. You (or an automated system) can send emails to a ScribeManager email address containing job information in the email body, and ScribeManager can use that to create new jobs. Obviously in that scenario ScribeManager does not have the audio files, but it can link to files hosted elsewhere. For example, you could send this email to ScribeManager:



ScribeManager can be programmed to “read” the contents of the email and create a job from that data. In the above example, ScribeManager grabs the deadline from the email subject, and from the email body it grabs the four file names and the four corresponding URLs where those files are located, and it adds that information to a new job on ScribeManager.

Any type of job data (such as rate of remuneration, charges, typist group, formatting information, etc) can be included in the email and read by ScribeManager – the files can even be allocated to specific typists within the email!

This method works exceptionally well with automated email notifications, such as those sent by file hosting systems like Box.com. Of course you could always download the files and upload them to ScribeManager manually, but it is much easier to have the emails sent direct to ScribeManager so that the jobs are created automatically.

The above is only an example of what ScribeManager can be programmed to do – obviously it will not work if you try it now. You must ask us to program and activate it first.

## **ADDING FILES TO SCRIBEMANAGER – METHOD 2: WEB UPLOAD**

---

To upload files to your ScribeManager account by web page upload, you or your clients can go to the “Upload URL” shown on the Company Details page (on the Settings menu).

Normally you would link from your web site to that page, so that your clients can upload to you conveniently. Each time you or your clients upload files on that page, a job is created in your ScribeManager account for those files.

Alternatively, you can create a job yourself while logged in, by going to Admin Jobs, Add Job. When the job is created you can add files to it on the Edit Job page by clicking Add More Files.

The advantages of web uploads are that they are simple to use and require no help from ScribeManager Support to set up. The disadvantages are that they are not automatic and can take time.

## **ADDING FILES TO SCRIBEMANAGER – METHOD 3: ADDING URLS**

---

The most common way to add work to your ScribeManager account is to upload sound files to it via the web. However, ScribeManager also enables you to add not a sound file but a link to a sound file which is hosted elsewhere, for example on a file hosting system such as Box.net.

The advantage of adding URLs is that you can add files instantaneously, without needing to wait for them to upload. It also means you can continue using any existing file hosting account

that you have, without asking your clients to change. Another advantage is that it enables ScribeManager to manage your file without actually having access to the content, which some clients prefer for contractual or security reasons. (For the same reason, your transcribers can also add a URL to ScribeManager instead of uploading a transcript, but you will need to ask ScribeManager Support to turn this option on for you.)

The disadvantage of adding URLs is that ScribeManager cannot automatically time the file or convert it to mp3 or reduce its background noise level, because it does not have the file. If you need the file length to be on ScribeManager, you will have to add it manually.

To add a URL to a job, create a job by going to Admin Jobs, Add New Job, then add the job, then on the Edit Job page click Add URL, and follow the instructions.

## **ADDING FILES TO SCRIBEMANAGER – METHOD 4: TELEPHONE**

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ScribeManager can be used with virtually any telephony recording system, so if you already have one, you can probably continue to use it. Alternatively, you can use ScribeManager's telephone recording system. This enables your clients to dial a normal telephone number and record a dictation or conversation, which is then automatically added to your ScribeManager account. This is a great service to be able to advertise to potential clients on your web site.

This type of service is normally used for solo dictation, i.e. one person dictating into the telephone, but your clients can also use it to record face-to-face interviews, by dialing the number and setting their telephone to speakerphone. This saves them having to use a handheld digital recorder and then connect it to a computer and manually upload the recording afterwards. Another option is to adopt a "belt-and-braces" approach and use both a handheld recorder and the telephone recording system, with the one backing up the other in case of data loss.

Please note that ScribeManager's telephone recording system is operated by a third party, and ScribeManager can accept no responsibility for it.

Telephone recording can be set up quickly by contacting ScribeManager Support.

This service is not free as part of ScribeManager. Please see the page ScribeManager Charges for more information.

## **ADDING FILES TO SCRIBEMANAGER – METHOD 5: FTP**

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File Transfer Protocol (ftp) is an easy way for you or your clients to add audio files to your ScribeManager account by transferring them from a PC (or server) onto the ScribeManager server. To use this facility, you will first need to ask ScribeManager Support to set it up for you, but it is often worth doing so because this method has a number of significant advantages.

To upload via ftp we suggest you or your clients use simple ftp software, which must be installed on the PC of the person sending the files. We recommend WinSCP, which is free and available here: <https://winscp.net/eng/download.php>

You can also use an ftp mirror with ScribeManager. This powerful method works by linking your ScribeManager account with a remote ftp server, either your own or that of someone else. Whenever an audio file is added to that remote ftp server, it automatically transfers to ScribeManager. In this manner ScribeManager can be connected with large entities that use ftp servers such as hospitals, law firms, and telephony companies that record calls as audio files – the possibilities are limitless. This method does not require you to install ftp software. Please consult ScribeManager Support if you are considering using this method.

If you set your audio files to be transferred automatically by ftp to ScribeManager, you should co-ordinate with ScribeManager Support as to when your files will be deleted from your source folder. If ScribeManager deletes the job before you delete the audio files from your folder, they will be added to your ScribeManager account a second time.

## SCRIBEMANAGER CHARGES, AND MAKING A PAYMENT

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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, and we will invoice your account on 31st March or soon after. 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, you will not be charged. Once your free trial period is over and you become a regular 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.

### ScribeManager Standard Charges:

- Account charge: US \$1.00 per month (i.e., \$1.00 covers your company's whole account including all users)
- Transcript line charge: US \$0.0019 per transcript line that you put through ScribeManager. As an example, a transcript of 100 lines costs US \$0.19 to put through ScribeManager. A "line" means 65 characters as counted by Practiline. Each transcript 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.

ScribeManager Charges for Non-Essential Extra Services (all optional):

- Sending text messages from ScribeManager: US \$0.16 per message per recipient.
- Telephone recording: US \$11 per month per user ID for ScribeManager's telephony system, plus US \$0.11 per minute of recording.
- Two-factor authentication: US \$0.16 per authentication.
- Partial transcripts (automated): US 0.03 per file
- Bespoke pages within ScribeManager: from US \$10 per month (depending on complexity)
- Bespoke development: US \$30 per hour

For other bespoke services, please contact us.

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.

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.

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

## BESPOKE SOLUTIONS

ScribeManager was designed in 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 some users commission a bespoke version of ScribeManager, to be used solely by them.

The advantages of a bespoke version include the following:

- ability for your company to adapt ScribeManager to its 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.

Costs for a bespoke server:

SERVICE	FREQUENCY	COST
initial consultation	one-off	free
setup	one-off	free (deposit may be required)
Support and development time for your bespoke features	According to your requirements	US \$27.50 per hour
domain	annual	approx \$15-20 per year
monthly server cost	per month	\$0 if hosted on our server, otherwise server charge is passed on at cost
account maintenance	per month	\$110
ScribeManager usage fees		as normal but with minimum of \$110 per month



## DOMAIN AUTHENTICATION

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Because of the high volume of spam email that is sent nowadays, mail servers are becoming ever more aggressive in their filtering of emails that they consider to be spam. If you send from ScribeManager a transcript about finance or narcotics, the receiving mail server may rate it as spam and block it. You may think your client has received it when in fact they have not, and this can cause great inconvenience.

ScribeManager has various methods of reducing the likelihood of non-delivery, one of which is domain authentication. This effectively means that you give the ScribeManager server permission to send emails from your domain. Receiving servers will know you have done so and are then much less likely to mark your emails as spam.

As well as making your email delivery more reliable, domain authentication has another advantage, in that it enables ScribeManager to track your delivery all the way to the recipient. If the email does not arrive, the sender (you) will receive an email notifying you of that fact, and normally giving the reason (e.g. the recipient's mailbox is full). You can then follow up with the recipient and if necessary deliver the email via a different method.

You can only authenticate a domain if you control that domain. You cannot authenticate a hotmail.com email address, for example.

In order to authenticate a domain, you need to edit your domain's DNS records. Sometimes this is done on the DNS section of your web site host's web site and sometimes it is on the web site of the company where your domain is registered. This process is not straightforward, and we recommend that you share your screen with us so we can advise.

However, if you want to try to edit your DNS records yourself, here are the instructions:

- 1 – Obtain from us the relevant DNS CNAME records.
- 2 – Log in to the web site where your domain's DNS records are held. Usually this is the web site where your web site is hosted, but it may be the web site where your domain is registered. Follow the site's instructions to edit your domain's DNS records, and amend them according to the CNAME records we have sent you.
- 3 – When you have finished editing the DNS records, you must ask us to complete the verification process at our end. We will inform you whether the authentication has been successful or not.



## OTHER PRODUCTS

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ScribeManager is one of a suite of 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 thousands of dud applications to find the few who make the grade. ScribeSifter does all the hard work for you!

<http://scribesifter.com/>

### The FTW Transcriber



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

- superior sound quality;
- automatic adding of time-stamps - huge time-saver! (optional);
- plays huge range of file types (it plays whatever Windows Media Player can play);
- timestamp formatting - add them in the format of your choice;
- save different timestamp and hotkey settings for different clients and retrieve them instantly;
- hotkeys for common transcription phrases like "overtalking" or "unclear";

- 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, balance, speed adjuster, etc;
- can be used with hotkeys or pedals.

Download it from:

<http://www.TheFTWtranscriber.com/>

## Handyfiles



# Handyfiles

Handyfiles is an online file storage and management solution that does exactly what you want. You can use it for anything from basic file storage to a sophisticated configurable workflow processing system. Whatever you need from your file management system, we can hand-tailor Handyfiles specifically for you.

## Generic File Converter



# generic file converter

Need to convert files fast? Generic File Converter converts hundreds of types, and it lets you buy a cheaper license to convert only the file types you need.

See the web site for details.

[www.GenericFileConverter.com](http://www.GenericFileConverter.com)

## DS2 Converter



Ds2 Converter swiftly converts dss and ds2 files to wav for easier transcription.

[www.Ds2Converter.com](http://www.Ds2Converter.com)

## ABOUT TYGER VALLEY SYSTEMS

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### 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 tens of thousands of recorded hours per year. He exited from the company in 2016 following a successful buy-out. Patrick 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.