Bytescribe Development Company

DocShuttle Internet Transcription Software

User's Tutorial

Software Version 5.0

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Welcome to DocShuttle

Thank you for your interest in DocShuttle by Bytescribe Development Company. DocShuttle is an FTP transport and workflow management system designed for transcription. It offers three main benefits:

- Encrypted transport of dictated audio files and transcribed document files across the Internet using File Transfer Protocol (FTP), which is designed for large file transport

- Workflow transparency and management that can be as manual or as automated as you need

- Document management and integration using Microsoft Word

About this Tutorial

This tutorial will show you how to configure and use the many features of DocShuttle by walking you through setting up and running DocShuttle in a test environment. Even if you have already purchased DocShuttle, and/or if you are certain that you are going to use DocShuttle in your own production environment, it is still a good idea to go through this tutorial in a test environment to ensure that you are familiar with all of the features of the system.

This tutorial is broken up into three sections:

- Setting Up – installing, registering, and connecting with DocShuttle; preparing the FTP site; permissions

- Basic Operations – importing, uploading, downloading, and playing dictation files; attaching, uploading, downloading, and printing document files

- Advanced Operations – workflow management; archiving files; the QA process; templates; reports

We have already set up a sample FTP site for you to use and you have audio files on your computer that can stand in for dictation files. Do not use actual dictations in this tutorial, and do not upload actual dictations to our sample FTP site.

Chapter

1

Setting Up

This section covers all of the things you will need to do to get DocShuttle and your FTP site ready to carry dictation and transcription files.

First, you will be given step-by-step instructions for installing each of the three DocShuttle modules: DocShuttle Administrator, DocShuttle Client, and DocShuttle Dictator. Second, you will set up the FTP site for use by DocShuttle. Third and finally, you will be shown how to enter the connection information that allows each DocShuttle module to access the FTP site.

When you are finished setting up, you will be ready to transfer dictation and document files across the Internet.

Installing DocShuttle

You may install DocShuttle from your CD or by downloading the installation file from our website. Downloading from the website will ensure that you are installing the most recent version, so you may wish to download even if you have a CD.

All three modules may be installed on the same computer. However, DocShuttle Administrator and DocShuttle Dictator cannot run on the same computer at the same time. So you may want to install DocShuttle Administrator and DocShuttle Dictator on separate computers, if you have them available. This tutorial assumes that both are installed on the same computer.

Also, to test out the QA process you will need to have a second installation of DocShuttle Client on a second computer.

Installing from the CD

1. Close all other programs on your computer

2. Insert the CD into your CD-ROM drive. The installation program should start automatically.

3. Follow the instructions for installing the software, and accept all the defaults.

4. The last step of the installation process will ask you if you want to launch the program file. Click to put a check in that box

5. Click the Finish button to finish the installation and open DocShuttle Administrator

6. When the DocShuttle Administrator software starts, a window will pop up telling you that you have an unregistered version of the software. Cancel out of that window to use the trial version of the software.

Repeat steps 2-6 for the DocShuttle Client and DocShuttle Dictator installation files.

When finished, you should have desktop icons for each of the three DocShuttle modules, as in the figure below. You can double click on those icons to open the DocShuttle software.
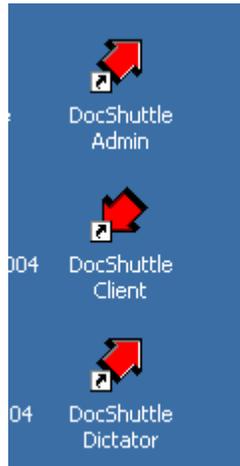
Downloading the installation files

1. Go to www.bytescribe.com

2. On the left-hand side of the main page is a button that says Downloads. Click on that button to go to the Downloads page

3. On the Downloads page is a form. The first box is labeled Products. Click in the Products box and choose DocShuttle Administrator.

4. Fill out the rest of the form, including the email field. You will need the Installation Password to install the software, and that password will be emailed to the address you enter on this form.

5. When you have finished filling out all of the fields on the form, click the Submit Request button. (Note: depending on your browser's security settings, you may see a box pop up telling you that you are being redirected to a non-secure page. If so, click Yes to continue.)

6. A File Download window will pop up, asking if you want to Open or Save the file. Click on the Save button to download the file.

7. A Save As window will pop up, asking you where you want to save the DocShuttle Administrator installation file. Click on the Button labeled Desktop, or click in the Save in box at the top to select Desktop. Then click the Save button to begin downloading the installation file. The DocShuttle Administrator installation file will begin downloading.

8. When the file has finished downloading, repeat the above steps to download the installation file for DocShuttle Client and DocShuttle Dictator.

When you are finished, you should have the installation files saved to your Desktop, as in the figure below. Now you are ready to install the three DocShuttle modules.
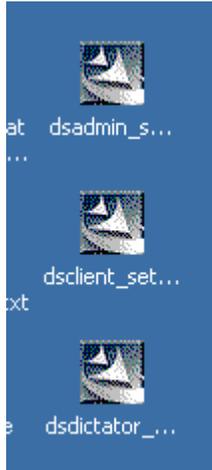
Installing from the downloaded files

1. Check your email for the Installation Passwords and write them down here:

   - DocShuttle Administrator – _____

   - DocShuttle Client – _____

   - DocShuttle Dictator – _____

2. Close all other programs on your computer, including your email program.

3. On your Desktop, find the DocShuttle Administrator installation file and double-click it to begin installation.

4. When prompted, enter the Installation Password that you wrote down in step 1. If the password is correct, then the Next button should become available. Click Next.

5. Continue to follow the instructions for installing the software, and accept all the defaults.

6. After the files are installed, a window will pop up with a box labeled "Yes, Launch the program file." Click to put a check in that box.

7. Click the Finish button to finish the installation and open DocShuttle Administrator.

8. A window will pop up containing the text of the license agreement. Read the agreement and then click in the circle labeled "I accept the terms of the license agreement." (If you do not accept the terms, cancel the registration and uninstall the DocShuttle software.) Click the Next button.

9. When the DocShuttle Administrator software starts, a window will pop up telling you that you have an unregistered version of the software. Click Register Later to use the trial version of the software.

10. A small window will pop up saying "Software has not been successfully registered." Click OK.

11. A window will pop up labeled "Did you know?" This window contains some tips about using DocShuttle and will pop up every time you open the program. (If you do not wish to see this

window every time, find the box in the lower left-hand corner labeled "Show this window at startup." Click to remove the check from the box.) Click OK.

12. Finally, the DocShuttle Administrator window will open. Note that in the blue bar at the top of the DocShuttle window is a message saying "**Unregistered Version – 14 Days Remaining**". You may now close DocShuttle Administrator.

Repeat steps 2-12 for the DocShuttle Client and DocShuttle Dictator installation files.

When finished, you should have desktop icons for each of the three DocShuttle modules, as in the figure below. You can double click on those icons to open the DocShuttle software.

Configuring Connection Information

Set up subfolders on FTP site

Bytescribe keeps an FTP site available for you to use when evaluating DocShuttle. But to allow you to fully evaluate DocShuttle and its internal security system, you will need to set up a subfolder on the FTP site for your own use.

Please note: the sample FTP site that you will be using is a public site. Do not upload actual dictation to the site.

1. Using Internet Explorer, connect to Bytescribe's sample FTP site by clicking on the following link or by typing it into the address bar of your web browser: ftp://sample:sample@simpleftp.net. This should open up a window that looks at the FTP site. You may see some folders on the sample FTP site, as in the figure below.
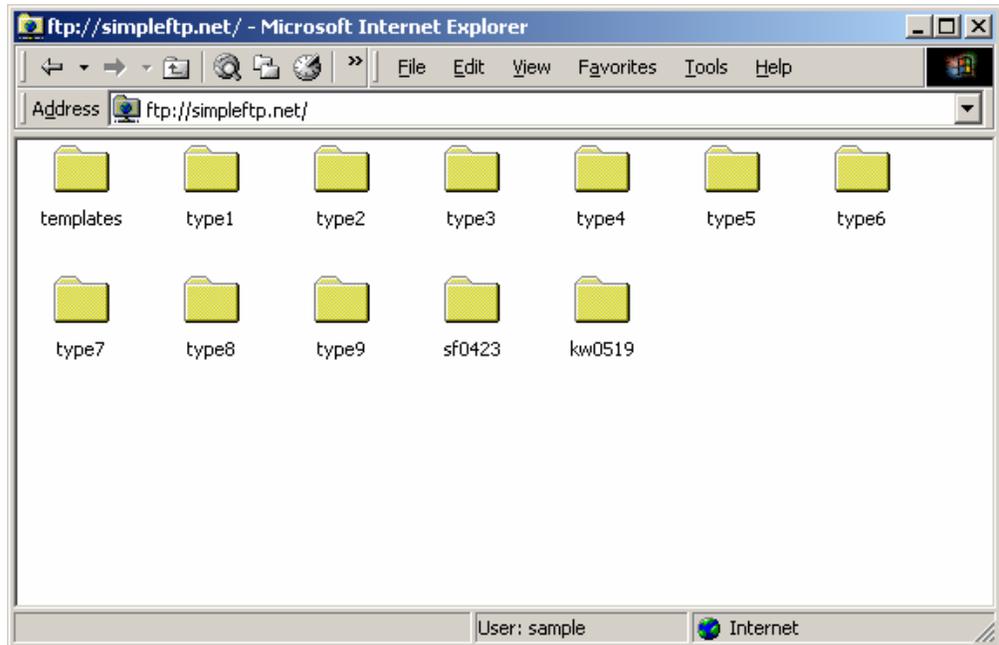
2. Right-click in the white space in the window and choose New, then select Folder. This will create a new subfolder on the FTP site for you to use. The name of the new folder is highlighted, so type in a folder name made up of your initials and today's date. For example, if your name is Jane Doe and today's date is June 30, then your folder name would be jd0630. This is the subfolder name we will use for the purposes of this guide.

   Write your own subfolder name here: _____

3. Now you have a subfolder on the FTP site that you can use for the evaluation. When you're finished with the evaluation, please come back and delete the folder.

Now you're ready to connect up with DocShuttle Administrator and finish preparing the FTP site. You can close the Internet Explorer window.

Connect with DocShuttle Administrator

DocShuttle uses a particular folder structure and particular filenames in order to manage workflow. Before you can upload dictation files to your FTP site, you will need to use DocShuttle Administrator to set up the FTP site.

Note: you will need to be connected to the Internet in order to connect to the FTP site.

1. Open DocShuttle Administrator

2. Click on the Tools Menu and select Settings

3. On the FTP tab, enter the following information in the first four boxes:

   - Host Address: simpleftp.net

   - Username: sample

- Password: sample

- Initial Directory: (your subfolder name from step 2 under Create subfolder on FTP site)

4. In the box labeled User's 4-Digit ID, enter 5555. That will be the Administrator's user ID. Now you have the connection information in place, and your FTP tab should look like the one in the figure below. (if your subfolder name is jd0630).
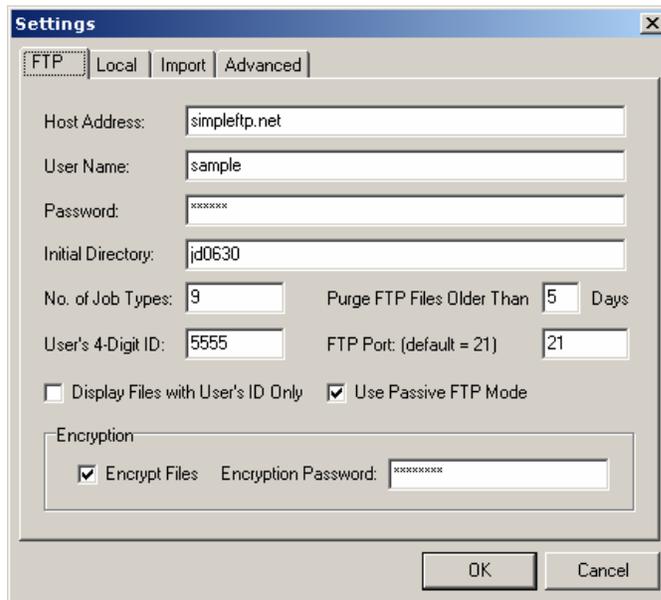
5. Click the OK button to accept the changes.

6. In DocShuttle Administrator, click on the Connection menu and select Connect to FTP.

7. You should see a small box, as in the figure below, pop up in the middle of your screen, showing the progress of DocShuttle Administrator connecting to the FTP site and checking for files to display.
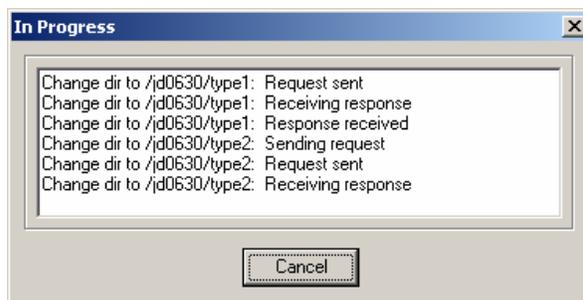
Once the box goes away, you should be connected to the FTP site. You can look at the top of the DocShuttle Administrator window for information about your connection status, as in the figure below.
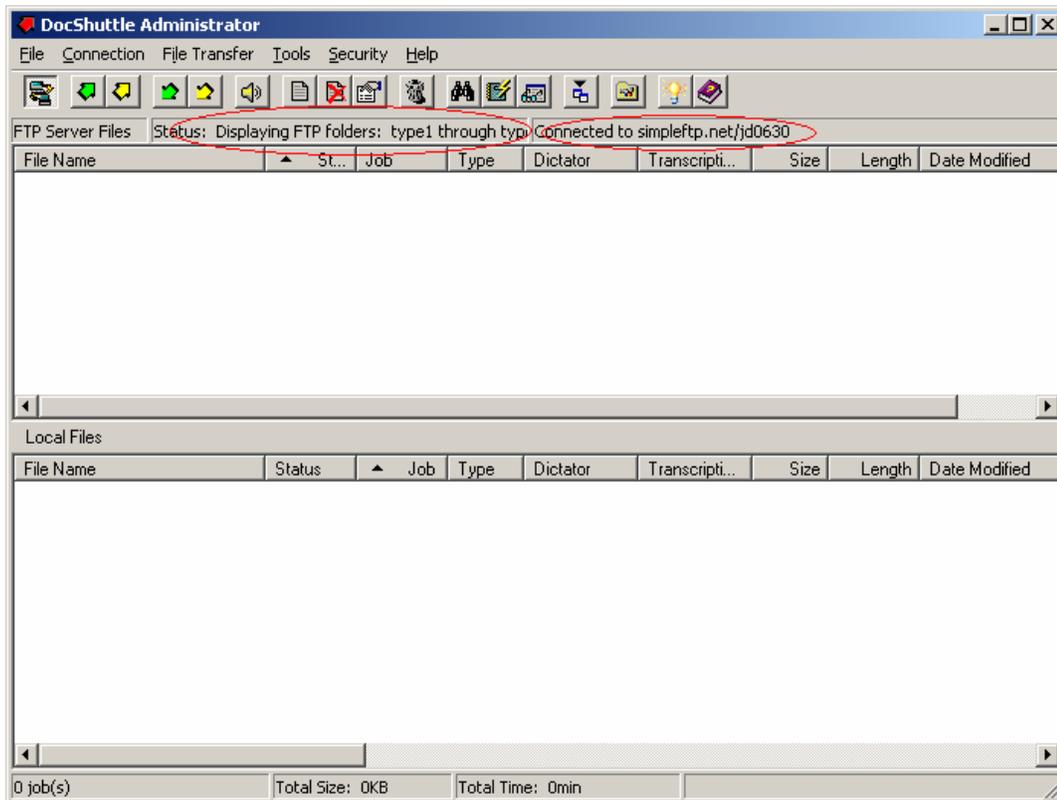
In the top status bar, directly under the buttons, you should see the Status as Displaying FTP folders. To the immediate right, you should see Connected to simpleftp.net/ and then your subfolder name.

Now you are ready to set up DocShuttle own folder structure on the FTP site.

Set up type folders

1. In DocShuttle Administrator, click on the Tools menu and select Create Folders on FTP site.

2. A box will pop up asking if you want to create the folders in your subfolder. Click Yes.

3. A box should pop up telling you that the operation was successful. Click OK.

You will not notice any change in the DocShuttle Administrator interface, but the folders have been created on the FTP site.

You may now close DocShuttle Administrator. If you are still logged into the FTP site, then a box will pop up asking, "Do you wish to disconnect and exit?" Click OK.

Connect with DocShuttle Dictator

1. Open DocShuttle Dictator

2. Click on the Tools menu and select Settings

3. Click on the FTP tab and enter the exact same information in the first 4 boxes that you entered into DocShuttle Administrator:

- Host Address: **simpleftp.net**

- Username: **sample**

- Password: **sample**

- Initial Directory: (your subfolder name)

4. In the box labeled User's Job Type, enter 1

5. In the box labeled User's 4-Digit ID, enter 1001, so that your FTP tab looks like the figure below.
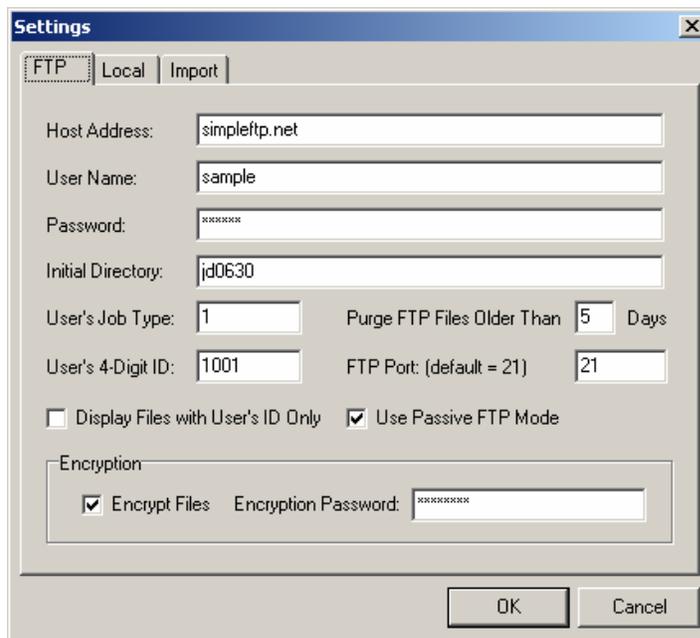
6. Do not make any other changes, and click OK to accept the information you have entered

7. Click on the Connection menu and select Connect to FTP.

Just like with DocShuttle Administrator, you should see the In Progress box pop up in the middle of your screen.

Once the box goes away, you should be connected to the FTP site. And just like with DocShuttle Administrator, you can look in the top status bar for your connection status. The only exception is that DocShuttle Dictator can only connect to and display one type folder at a time. In this case, you should see Displaying FTP Folder: type1.

At this point, both DocShuttle Administrator and DocShuttle Dictator are set up and ready to go. Go ahead and close DocShuttle Dictator, and we will finish setting with DocShuttle Client.

Connect with DocShuttle Client

DocShuttle Client is the piece of the DocShuttle system that is used by the transcriptionist. DocShuttle Client can download audio files from the FTP site and can also upload document files back to the FTP site for both the dictator and the transcription administrator.

In this section, we are going to set up DocShuttle Client to connect to the FTP site.

1. Open DocShuttle Client

2. Click on the Tools menu and select Settings

3. Click on the FTP tab and enter the exact same information in the first 4 boxes that you entered into DocShuttle Administrator and DocShuttle Dictator:

   - Host Address: **simpleftp.net**

   - Username: **sample**

   - Password: **sample**

   - Initial Directory: (your subfolder name)

   - In the box labeled User's Job Type, enter **1**

   - In the box labeled User's 4-Digit ID, enter **9010**, so that your FTP tab looks like the figure below.
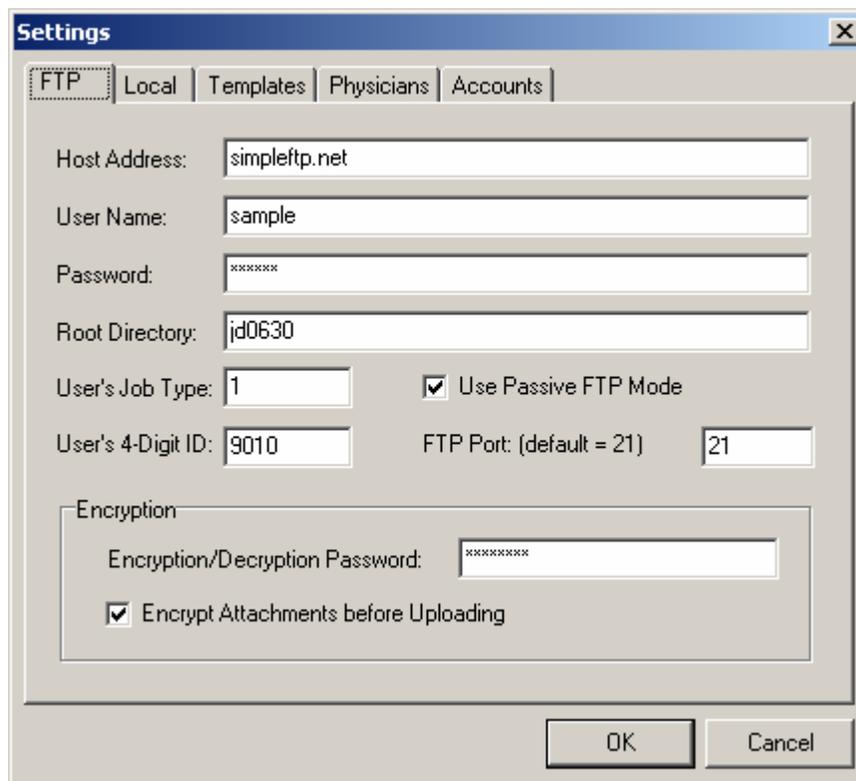
4. Do not make any other changes, and click OK to accept the information you have put in

5. Click on the Connection menu and select Connect to FTP.

Just like with the other DocShuttle modules, you should see the In Progress box pop up in the middle of your screen.

Once the box goes away, you should be connected to the FTP site. And just like with the other DocShuttle modules, you can look in the top status bar for your connection status.

DocShuttle Client is like DocShuttle Dictator, and can only connect to and display one type folder at a time. In this case, you should see Displaying FTP Folder: type1.

Now the setup for the FTP site and the connection information for each of the DocShuttle modules is complete. You only need to do this setup once.

Turn off Automatic Document Creation

DocShuttle Client does have an Automatic Document Creation function, which will not be used at this point in the evaluation. So it's best to turn off this feature for a little while.

1. In DocShuttle Client, click on the Tools menu and select Settings

2. Click on the Local tab

3. At the bottom of the window there is a box labeled "Create new Word document when transcribing file." Click to remove the check in that box, as in the figure below.
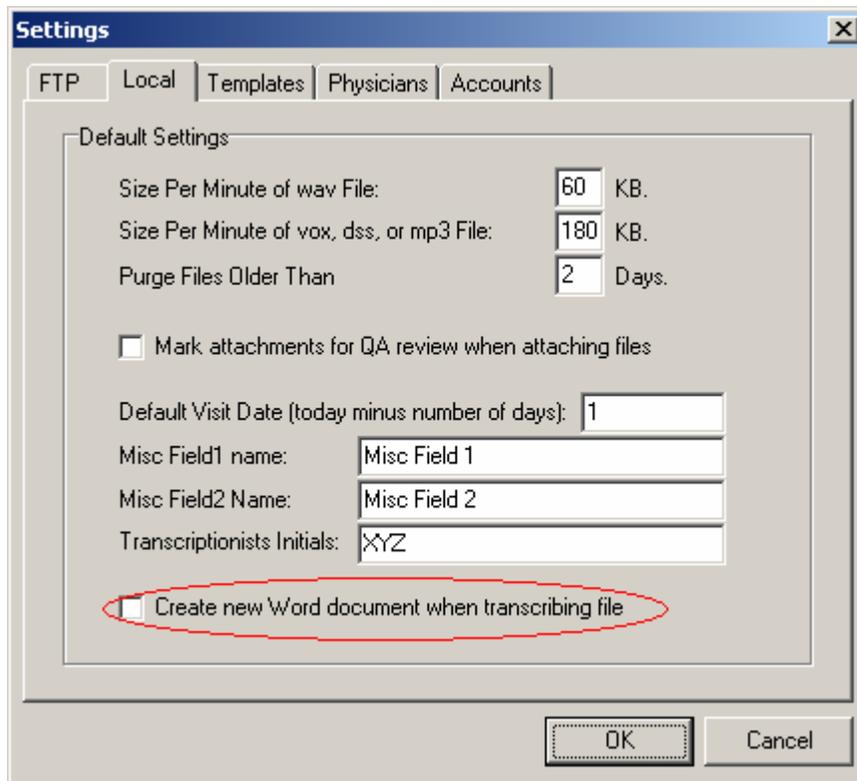
4. Click OK to return to the DocShuttle Client main screen.

5. Close DocShuttle Client.

Permissions

DocShuttle uses its own internal security system, based on User Permissions. In the last section, you created a set of folders on the FTP site. Those folders will hold both the audio and document files, and you can either allow or deny access to each folder for each user in DocShuttle.

In DocShuttle, the folders are called alternately Job Types, Type Folders, or just Types. These all mean the same thing. A file that shows as being in Job Type 4 in the DocShuttle window will be kept in the type4 folder on your local computer and in the type4 folder on the FTP site. DocShuttle can work with up to 99 type folders.

A user is allowed or denied access to a type folder based on their 4-Digit User ID. For the purposes of this evaluation, we are going to set up permissions for 5 users: 1 Administrator, 2 Transcriptionists, and 2 Dictators.

Create user profiles

1. Open DocShuttle Administrator

2. Click on the Security Menu and select Users Permissions. The Users Permissions window should pop up, as in the figure below.
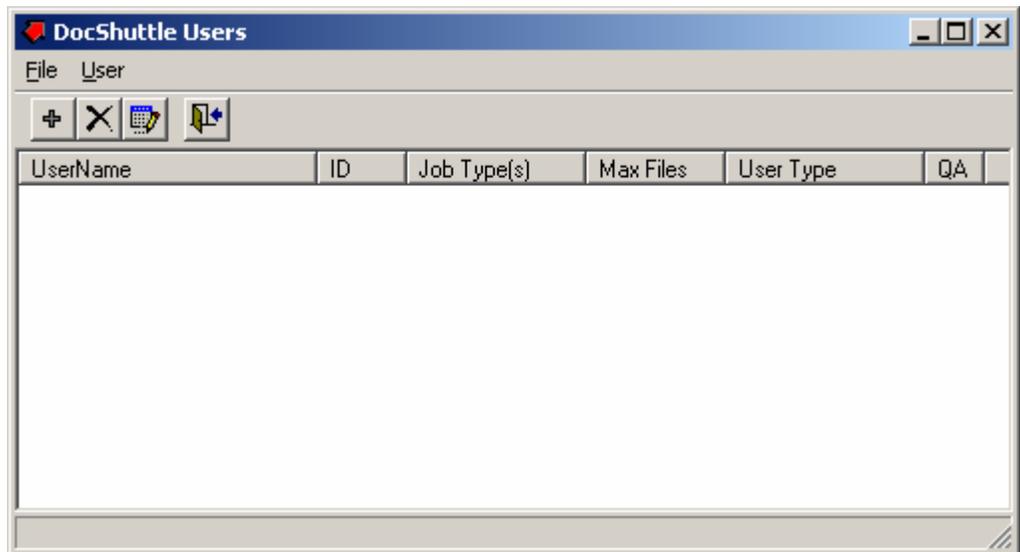
3. Click on the User menu and choose Add to begin creating a new user. The Add New User box should pop up, as in the figure below.

4. We will create the Administrator user first. In the box labeled User Name, type in your name. In the box labeled 4-Digit User ID type in **5555**. Note that this is the user ID you have already been using to log in. Until permissions have been set, it is possible for anyone to log into the FTP site with any user ID. Once permissions have been set, it is only possible to log in with a valid user ID.

5. The next box is labeled Max No. of Files. Leave it blank.

6. In the box labeled User Type, click and choose **Administrator**. A user ID with the user type Administrator can only log in with DocShuttle Administrator. The same applies to user type Dictator and DocShuttle Dictator and user type Transcriptionist and DocShuttle Client.

7. In the first box labeled Job Types, leave the selection as All Types. The Administrator needs to see all files in all job types. The other 4 Job Types boxes should remain blank.

Your Administrator user is now complete, and the Add New User window should look like the figure below.

8. Click OK to accept the new user. Now there is a user in the DocShuttle Users window, like the figure below.

9. Now add 4 more users with the following information:

- Dictator #1

  User Name: **Dr. Smith**
  4-Digit User ID: **1001**
  Max No. of Files: (leave blank)
  User Type: **Dictator**
  Job Type: **type1** (leave the other boxes blank)

- Dictator #2

  User Name: **Dr. Jones**
  4-Digit User ID: **1002**
  Max No. of Files: (leave blank)
  User Type: **Dictator**
  Job Type: **type1** (leave the other boxes blank)

- Transcriptionist #1

  User Name: **Elizabeth Bennet**
  4-Digit User ID: **9010**
  Max No. of Files: **1**
  User Type: **Transcriptionist**
  Grant Permission for QA: (leave unchecked)
  Job Type: **type1** (leave the other boxes blank)

- Transcriptionist #2 (QA Transcriptionist)

  User Name: **Anne Shirley**
  4-Digit User ID: **9500**
  Max No. of Files: (leave blank)
  User Type: **Transcriptionist**
  Grant Permission for QA: **check**
  Job Type: **type1** in the first box, **type2** in the second box (leave the other boxes blank)

There should now be 5 users in the DocShuttle Users window, as in the figure below.
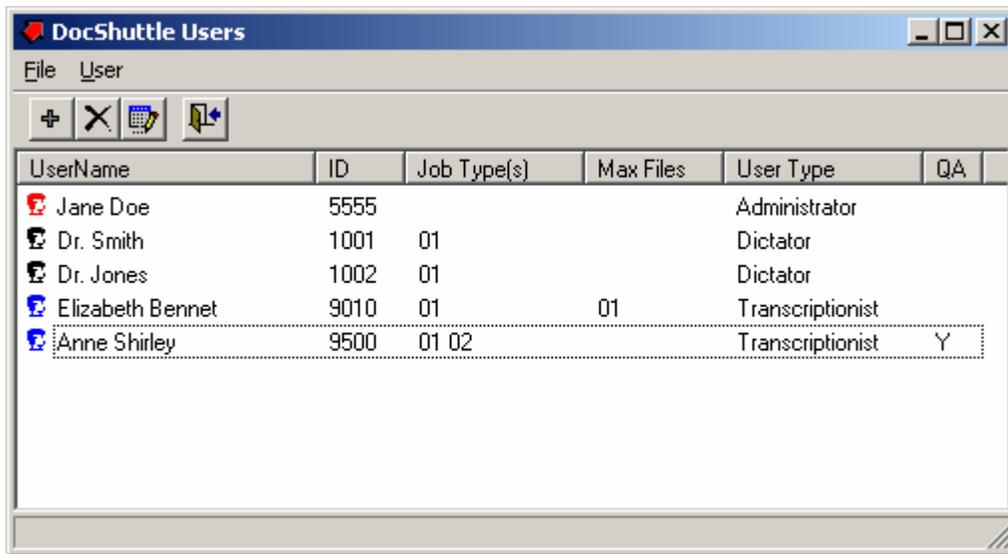
Now the permissions have been created, but in order for them to take effect, the permissions need to be set. Setting permissions puts a copy of the permissions file (enc.prm) on the FTP site. Whenever a DocShuttle module logs into the FTP site, it downloads a copy of the permissions file and checks to see if the user has permission to access the folder they are trying to open. If so, they can log in; if not, they will be denied access and will receive an error message.

Set permissions

1. Close the DocShuttle Users window by clicking on the X in the upper-right corner. There will be a message box telling you that you need to set the permissions. Click OK in the box.

2. Connect to the FTP site again

3. Click on the Security menu and select Set Permissions.

4. A box will pop up asking if you wish to continue. Click OK.

5. Another box will pop up saying Permissions Set. Click OK.

The permissions are now set on the FTP site, and only someone with a valid user ID can log in using DocShuttle. Now would be a good time to test it.

Test User Permissions

1. Disconnect from the FTP site.

2. Click on the Tools menu and select Settings

3. In the box labeled 4-Digit User ID, type in 5556. Note that this is not an ID that has been set.

4. Click OK to close the Settings window.

5. Now try to reconnect to the FTP site. You should receive a box saying that you were denied access, like the picture below.
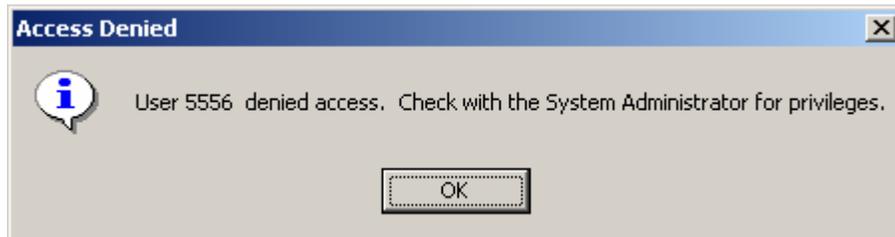
6. Click OK. Note that your connection status is Disconnected and Logged out. DocShuttle denied access because the user ID was invalid.

7. Click on the Tools menu and select Settings

8. In the box labeled 4-Digit User ID, type in 5555. This is the valid Administrator ID, and so you should be able to connect.

9. Click OK to close the Settings window.

Now try to reconnect to the FTP site. You should be allowed access, since the user ID is valid.

Setting up DocShuttle Dictator for Importing

Both DocShuttle Dictator and DocShuttle Administrator can import files from folders on the local computer or another computer on the network. You just need to tell DocShuttle where the files have been saved.

In this section, you will create two local folders for two different dictators: Dr. Smith and Dr. Jones. Then you will put some audio files into those folders for use during the rest of the evaluation. Finally, you will set up DocShuttle to import the files from those folders.

Create download folders

1. Open Windows Explorer (Start > Programs > Accessories > Windows Explorer)

2. When the Windows Explorer window opens, double-click on the C: drive on the left hand side. This will display on the right-hand side of the window all of the files and folders on the C: drive.

3. Right-click in the right-hand side of the window and select New, then Folder. This will cause a new folder to be created.

4. The name of the new folder is highlighted, so type in dr_smith. Then hit Enter. Now you have a folder on your C: drive named dr_smith. The pathname for that folder is C:\dr_smith.

5. Right-click in the right-hand side of the window and again select New, then Folder. This will cause another new folder to be created.

6. The name of the second new folder is highlighted, so type in dr_jones. Then hit Enter. Now you have another new folder on your C: drive, this one named dr_jones. The pathname for that folder is C:\dr_jones.

Now Dr. Smith and Dr. Jones have folders on the computer. For the purposes of this evaluation, we will pretend that these are the folders where the files from the handheld recorders would get saved.

Put audio files in the download folders

1. Leave the Windows Explorer window open. The contents of the C: drive should still be available. Double-click on the folder named WINDOWS to view its contents (you may not have a WINDOWS folder. If not, then you should have a folder named WINNT. Double-click on that one.)

2. In the WINDOWS (or WINNT) folder find the folder named Media and double-click on it to view its contents. You should see a lot of .wav and other audio files.

3. Find the two files named chimes.wav and chord.wav (they may be named just chimes and chord). Select them both, click on the Edit menu, and choose Copy.

4. Go back to the dr_smith folder you just made on the C: drive. Double-click to open the folder, click on the Edit menu, and select Paste to put the two files in the folder.

5. Do the same thing to put the files in the dr_jones folder.

Now both Dr. Smith and Dr. Jones have files in their folders. For the purposes of this evaluation, we will pretend that these are the dictation files that have been downloaded from their handhelds.

Entering import paths

1. Open DocShuttle Dictator

2. Click on the Tools menu and select Settings

3. Click on the Import tab. You will see 5 rows of 2 boxes.

4. Notice that in the first row, the second box (User ID) has Dr. Smith's user ID already entered and in gray: 1001. This box always gets the user ID from the FTP tab. You can type user ID's into each of the other boxes in this column, but not the first one.

5. Delete all text from the 9 boxes that allow you to delete.

6. In the first box of the first row, type in the full path name to Dr. Smith's folder: C:\dr_smith

7. In the first box of the second row, type in the full path name to Dr. Jones's folder: C:\dr_jones

8. In the second box of the second row, type in 1002. This is going to be Dr. Jones user ID in DocShuttle.

9. On the bottom half of the Import tab are 3 boxes. Click to put check marks in the second and third boxes. There should not be a check in the first box (Delete Source Files after Import). When you are done, the Import tab should look like the figure below.
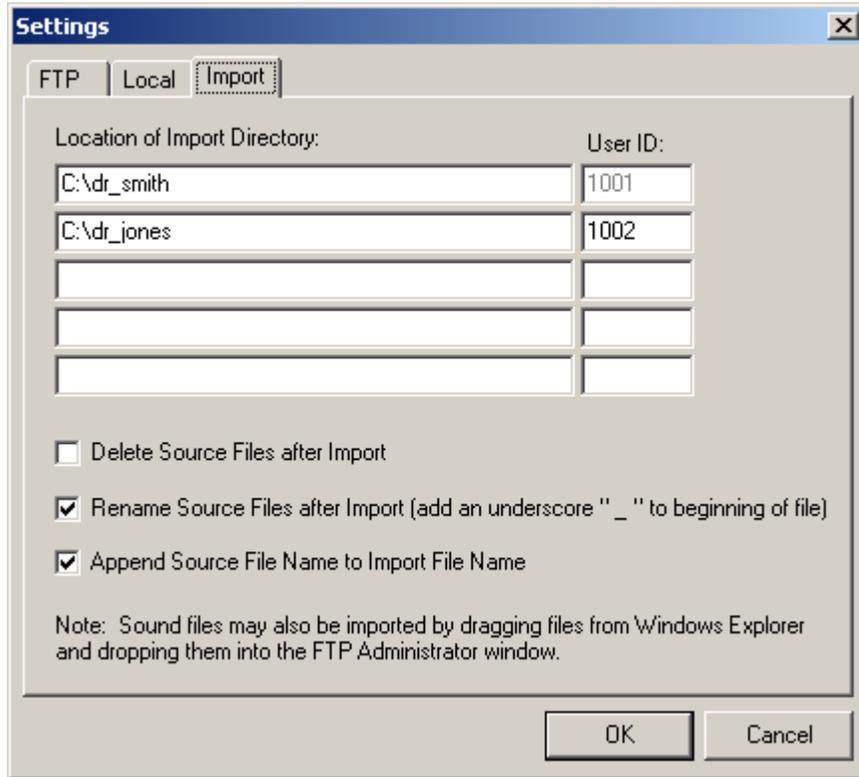
10. Click on the OK button to accept the changes.

Now DocShuttle Dictator is set up to import the dictation files that are in the doctors' folders.

Basic Operations

The basic process for using DocShuttle is very simple:

- Import and upload dictation files using DocShuttle Dictator

- Download dictation files using DocShuttle Client

- Transcribe dictation file and save document

- Attach document files and upload using DocShuttle Client

- Download and print document files using DocShuttle Dictator

This section will walk you through each of the steps in this process. First you will do it all manually. Then you will be shown how to turn on the automated features.

Importing with DocShuttle Dictator

Importing gives a file a DocShuttle filename, and copies the file to a location on your computer. Both of these things are required in order for DocShuttle to see and work with the files.

Import dictation files manually

1. In DocShuttle Dictator, click on the Tools menu and select Import Files.

2. DocShuttle will ask you if you wish to import files. Click Yes.

3. You should see a little box that pops up saying that 4 files were imported. If you do not see that 4 files were imported, go back and make sure that the pathnames to the two import folders are correct.

4. Click on the Tools menu and select Import Files again.

5. DocShuttle will ask if you want to import files. Again, click Yes.

6. This time, you should see a little box that says 0 files were imported. When the Rename Source Files after Import box is checked, DocShuttle will not re-import the same files again.

Once the files are imported, you should see 4 files in the bottom pane of DocShuttle. Two of those files should have 1001 in the Dictator column, and two should have 1002, just like in the figure below.
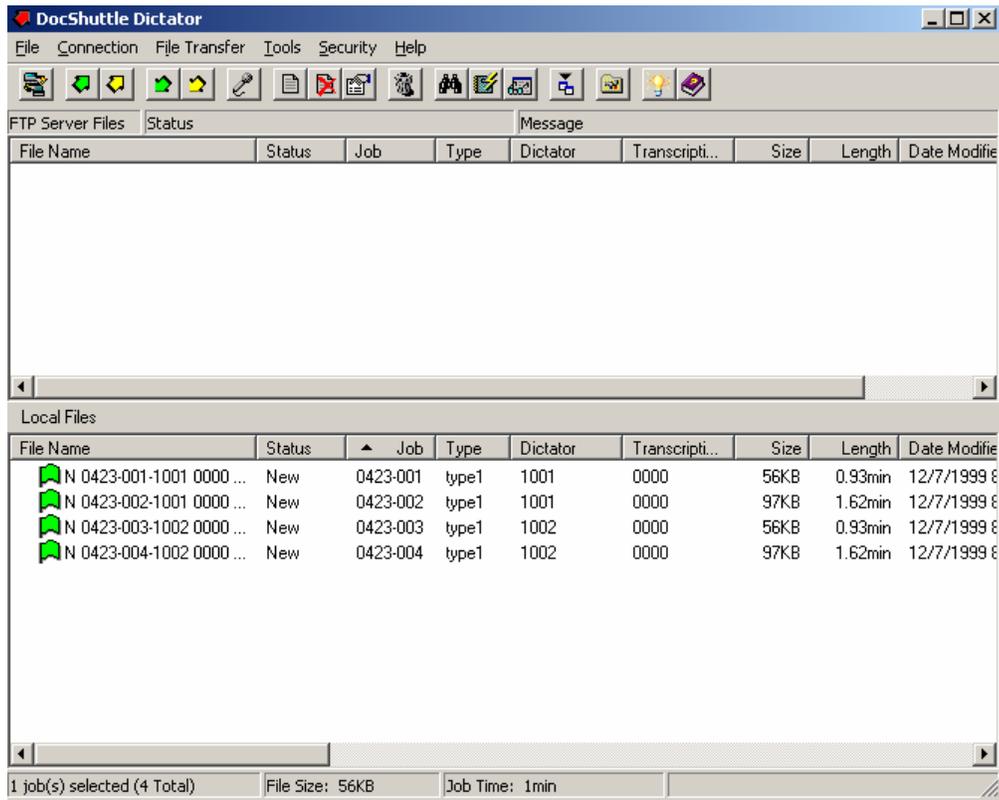
Now the files are available for DocShuttle Dictator to upload. To do that, DocShuttle Dictator must have the proper connection information for the FTP site.

Upload dictation files manually

Both DocShuttle Dictator and DocShuttle Administrator can upload dictation files. Uploading places the files on the FTP site where a transcriptionist with proper permissions and DocShuttle Client can see and retrieve them.

1. In DocShuttle Dictator, click on the green up arrow, shown in the figure below.

2. You will be asked if you want to upload the files. Click OK to proceed with uploading.

A Transfer Progress box will pop up (like the one in the figure below), showing the progress of each file as it uploads, the total number of files in this upload batch, and which file is currently uploading.
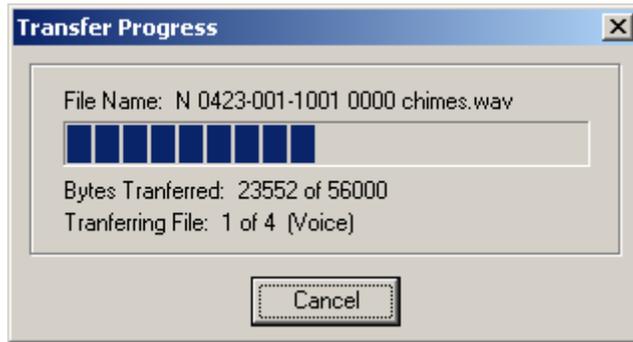
Once the upload is complete, you should see all 4 files in the top pane of DocShuttle Dictator, as in the figure below. This means that the files are up on the FTP site.
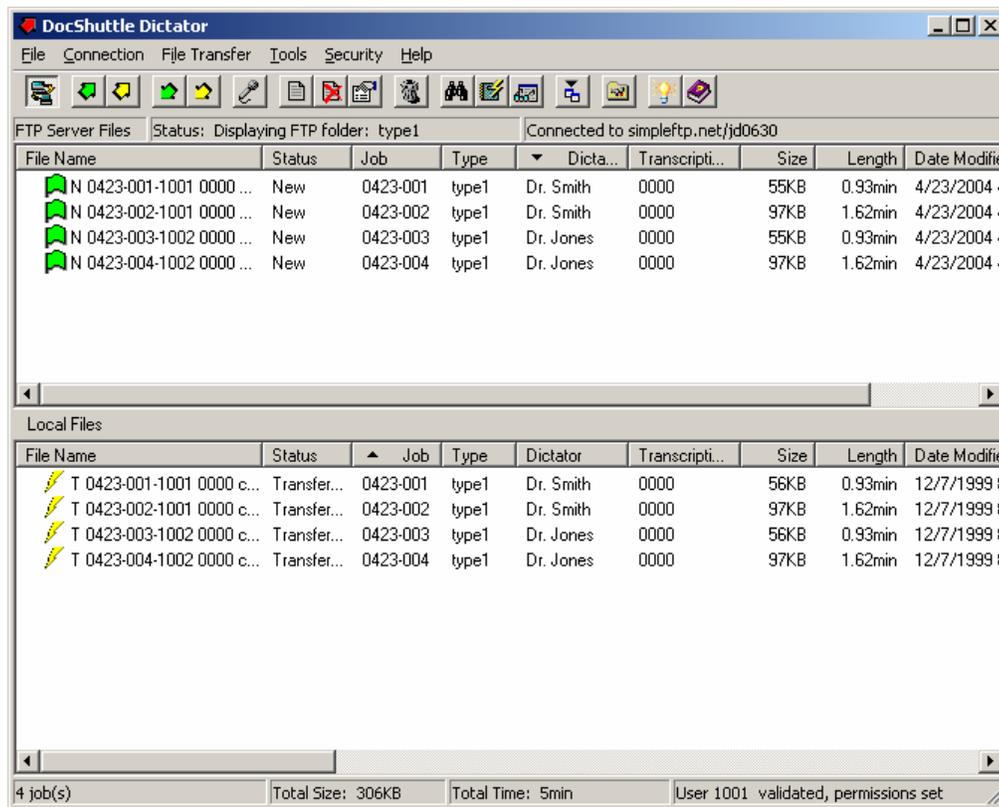
Now take a look at the status of the files. The bottom pane of DocShuttle Dictator shows the Local Files. These are the files that are located on your computer. The status of the local files has changed from New to Transferred. This lets you know that the files were uploaded to the FTP site.

The top pane of the DocShuttle Dictator window shows the files on the FTP site. These files have the status of New, and are now available to anyone who has DocShuttle Client or DocShuttle Administrator and who has permission to access the type1 folder.

The files are now available for transcription. You can leave DocShuttle Dictator open while using DocShuttle Client, so that you can see the change of the status of the files during the basic process.

Import & Upload dictation files automatically

Instead of manually connecting, importing, and uploading dictation files each time, you can schedule DocShuttle to do each of these things automatically, on a timer.

1. In DocShuttle Dictator, click on the Tools menu and select Settings

2. Go to the Local tab

3. The bottom section of the tab is labeled Scheduled Processes. In that section are several boxes. Click to place check marks in the boxes labeled Schedule Uploads and Schedule Importing.

4. Also in the Scheduled Processes section is a box labeled Timer Interval. This is how long DocShuttle waits between scheduled processes. Type 5 in the box to set the timer to wait 5 minutes between scheduled processes, as in the figure below.
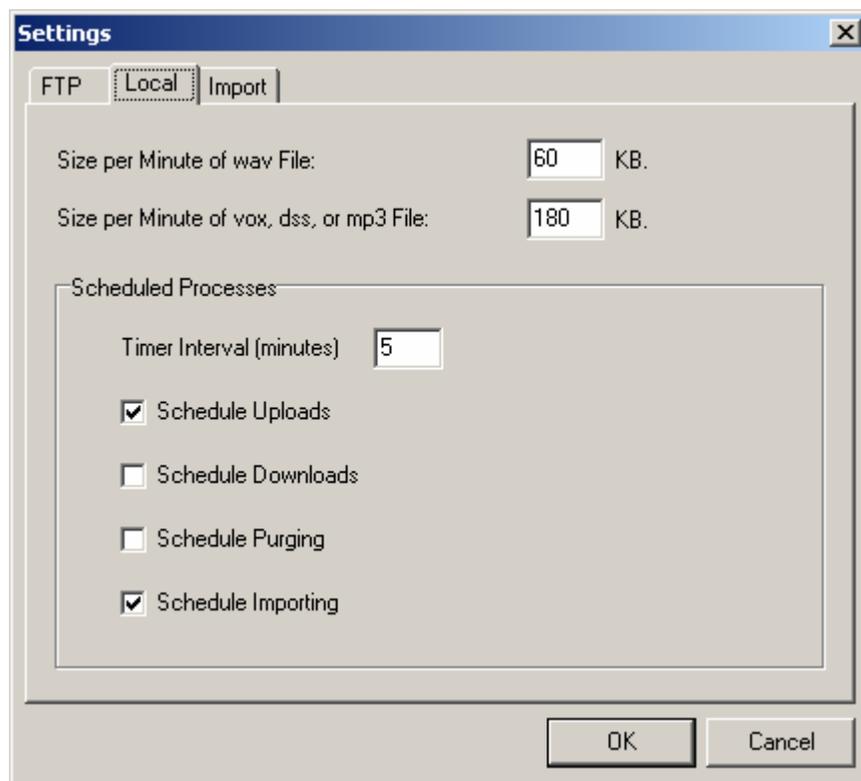
5. Click OK.

Now DocShuttle Dictator is set up to automatically import files from the import folders that were entered, automatically connect to the FTP site, and automatically upload files to the FTP site. When it is done, it will wait 5 minutes and then do everything again.

The computer will need to remain connected to the Internet, and DocShuttle Dictator will need to remain on in order for the scheduled processes to run.

Download dictation files

1. Once DocShuttle has been set up, you can log in at any time to see what files are available for transcription.

2. Open DocShuttle Client and connect to the FTP site

3. Once you are connected, you should see the four files in the top pane, as in the figure below.
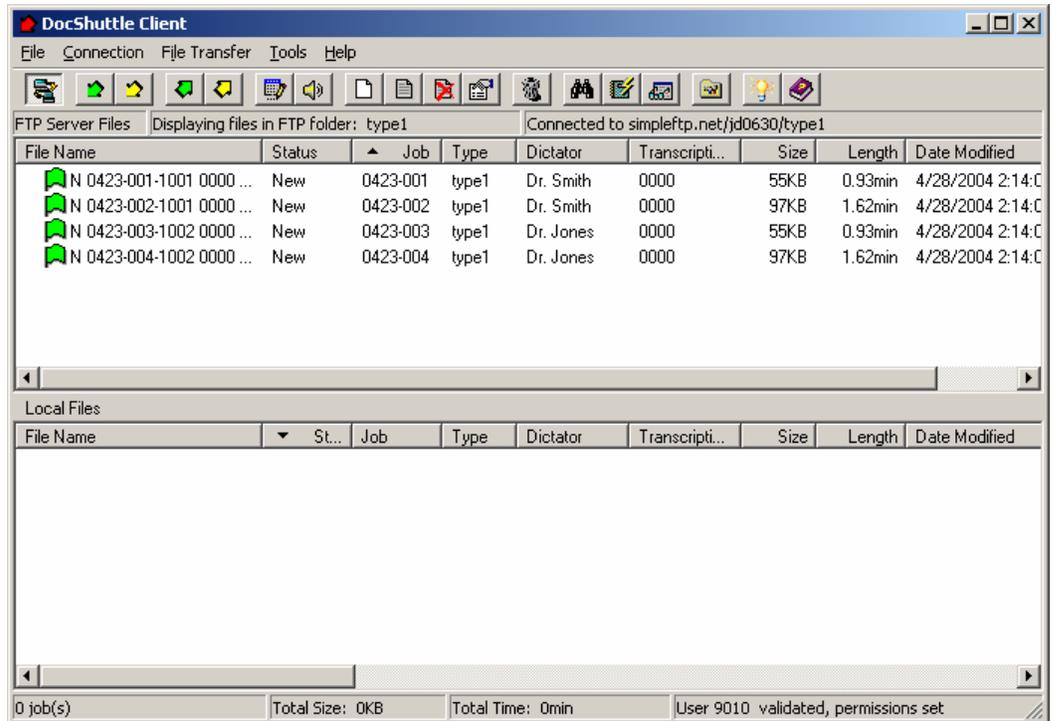
4. Now click on the green down arrow, shown in the figure below, to download all available dictation files.

5. You will be asked if you want to download the files. Click OK to proceed with downloading.

A Transfer Progress box will pop up (like the one in the figure below), showing the progress of each file as it uploads, the total number of files in this upload batch, and which file is currently uploading.
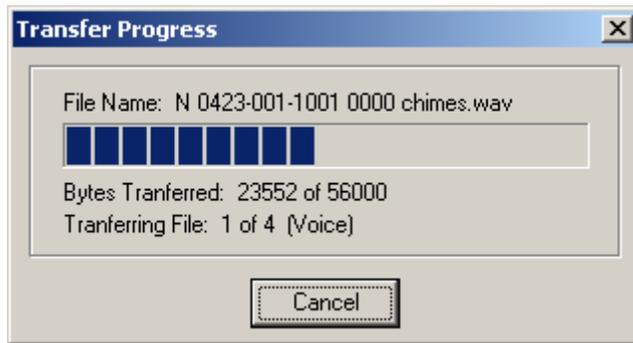
6. Remember that when you set up user permissions, user 9010 was given a limit of the number of files to download. That limit is set to 1 file, so after the first file is downloaded, the Maximum Limit Reached box will pop up, as in the figure below. Click OK.

Once the download is complete, you should see one file in the bottom pane of DocShuttle Client, as in the figure below. This means that the file has been downloaded to the local computer.
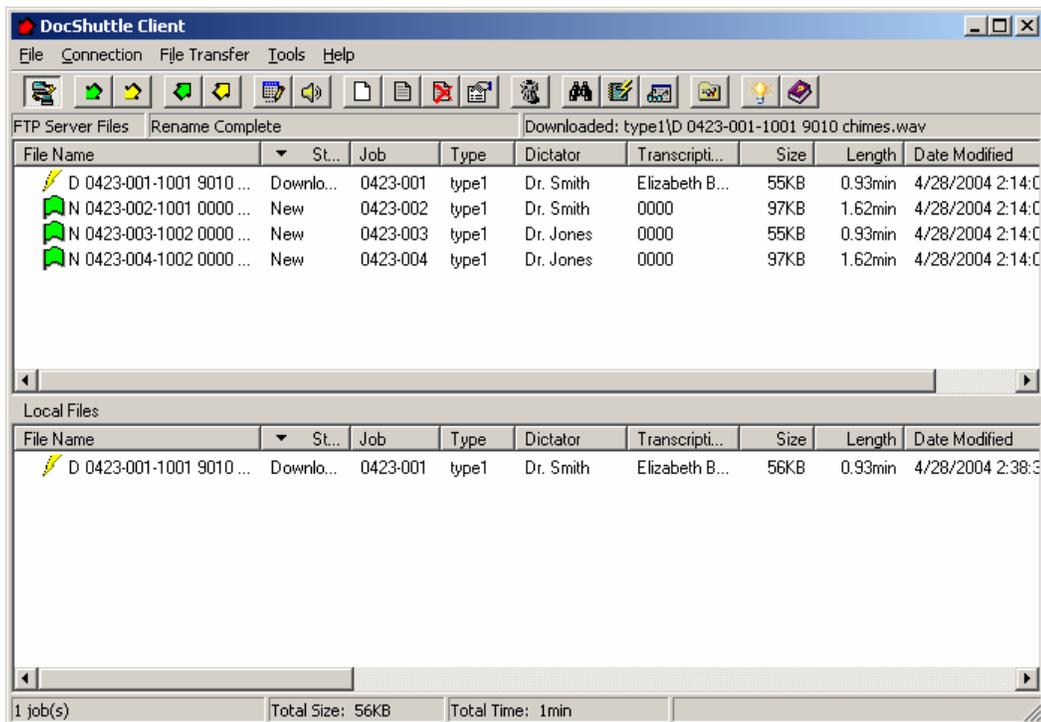
Now take a look at the status of the files. The bottom pane of DocShuttle Dictator shows the Local Files. There is one file there, with the status of D for Downloaded.

The top pane of the DocShuttle Dictator window shows the files on the FTP site. See that the file on the FTP site that was downloaded now has the status of D for Downloaded as well. The other files remain New. Also, note that the name of the user who downloaded the file is shown.

The status of the downloaded file and the name of the user who downloaded it are available to anyone in your DocShuttle system that is looking in the type1 folder.

The downloaded file is now saved to your computer and can be played in your wav player.

Play audio

To play the file, just double-click on it in the bottom pane of the DocShuttle Client window.

If you are using a Bytescribe WavPlayer to transcribe your audio files, then the WavPlayer will open up with the file already loaded, as in the figure below.

If you do not have Bytescribe's WavPlayer installed, then double-clicking on the file will open the audio file in Windows Sound Recorder, as in the figure below.
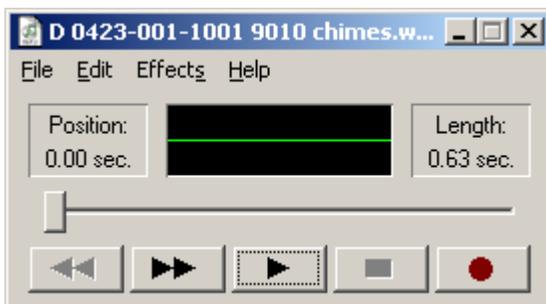
If you wish to use another wav player, that is fine. DocShuttle is not affected by which wav player you use, except that it cannot automatically load the files into other wav players; so you will need to open the files manually.

All downloaded files are stored on your computer at C:\Program Files\Bytescribe\ DocShuttle Client\TypeX, where X is the job type of the file. So, for example, the file you currently have downloaded is in job type 1, so it is stored on your computer at C:\Program Files\Bytescribe\ DocShuttle Client\Type1.

To make opening files easier with other wav players, you can create a desktop shortcut to the Type1 folder.

This guide will assume that you are using Bytescribe's WavPlayer.

Now that the audio file has been downloaded and played, it is time to attach the typed document and send it back to the dictator. In this section we will create a sample text document, attach it to the audio file, and upload it back to the FTP server. Once the file is on the FTP server, DocShuttle Administrator and DocShuttle Dictator can download, print, and save it.

Create sample documents

DocShuttle can work with most types of document files. Let's create the simplest kind of document file, a .txt file, to send back to the server.

1. Click on the Start menu, select Programs, then select Accessories, then select Notepad

2. When Notepad opens, type your name and the date, as in the figure below.
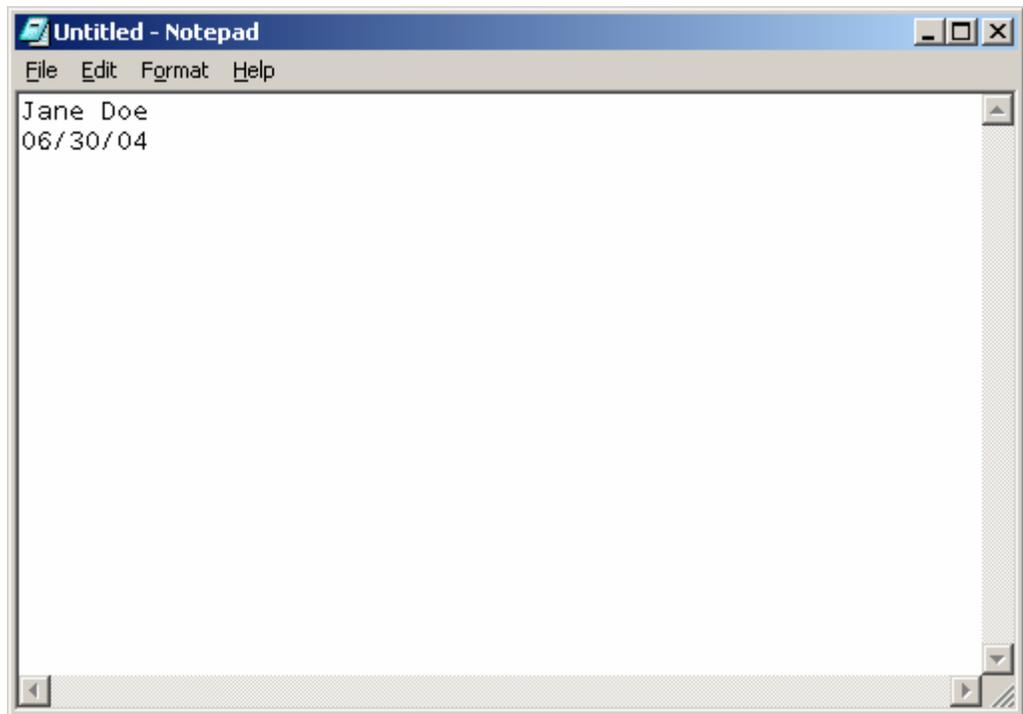
3. In Notepad, click on the File menu and select Save As . . .

4. Name the file "Test Document 1.txt" and save it to your Desktop.

5. Once the file is saved, close Notepad.

Manually attaching documents

Now that you have a document file ready, you can attach it to the downloaded audio file in DocShuttle Client.

1. In the bottom pane of DocShuttle Client, find the audio file you downloaded.

2. Right-click on the audio file and select Attach External Document

3. The Attach File window will pop up. Go to the Desktop and select the document file you made, Test Document 1.txt. Click Open.

Note that the status of the audio file changes from a D (for Downloaded) to an A (for Attachment), as in the figure below. This means that a document has been attached to the audio file, but that the document has not yet been uploaded to the server.
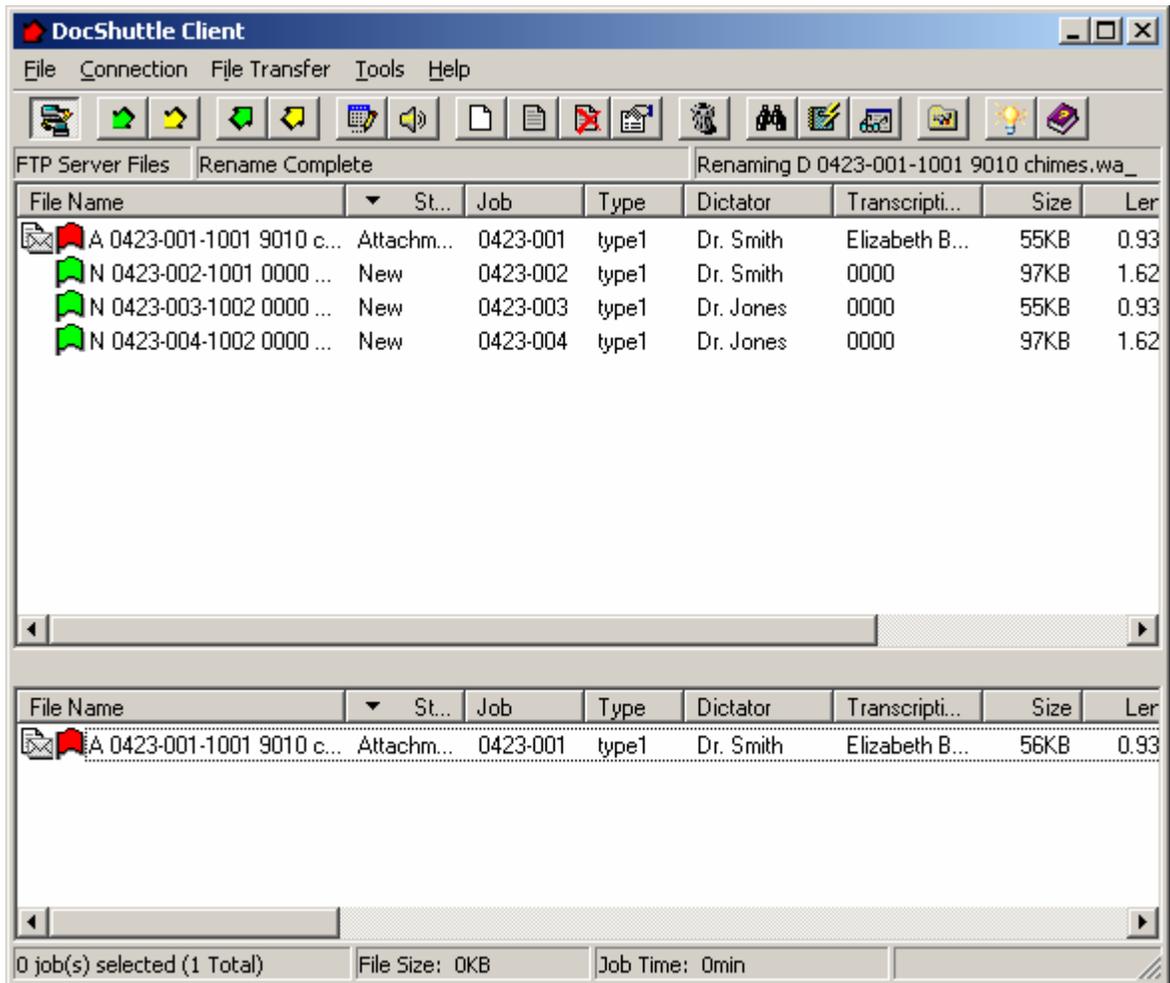
Upload documents

In order for the document to be available to other people in DocShuttle, you will need to upload it to the server. Uploading attached document files with DocShuttle Client is very similar to uploading dictation files with DocShuttle Dictator.

1. In DocShuttle Client, click on the green up arrow

2. You will be asked if you want to upload the files. Click OK to proceed with uploading.

A Transfer Progress box will pop up, showing information for the document file.

Once the upload is complete, the file will change in status from A (for Attachment) to U (for Upload) as in the figure below.
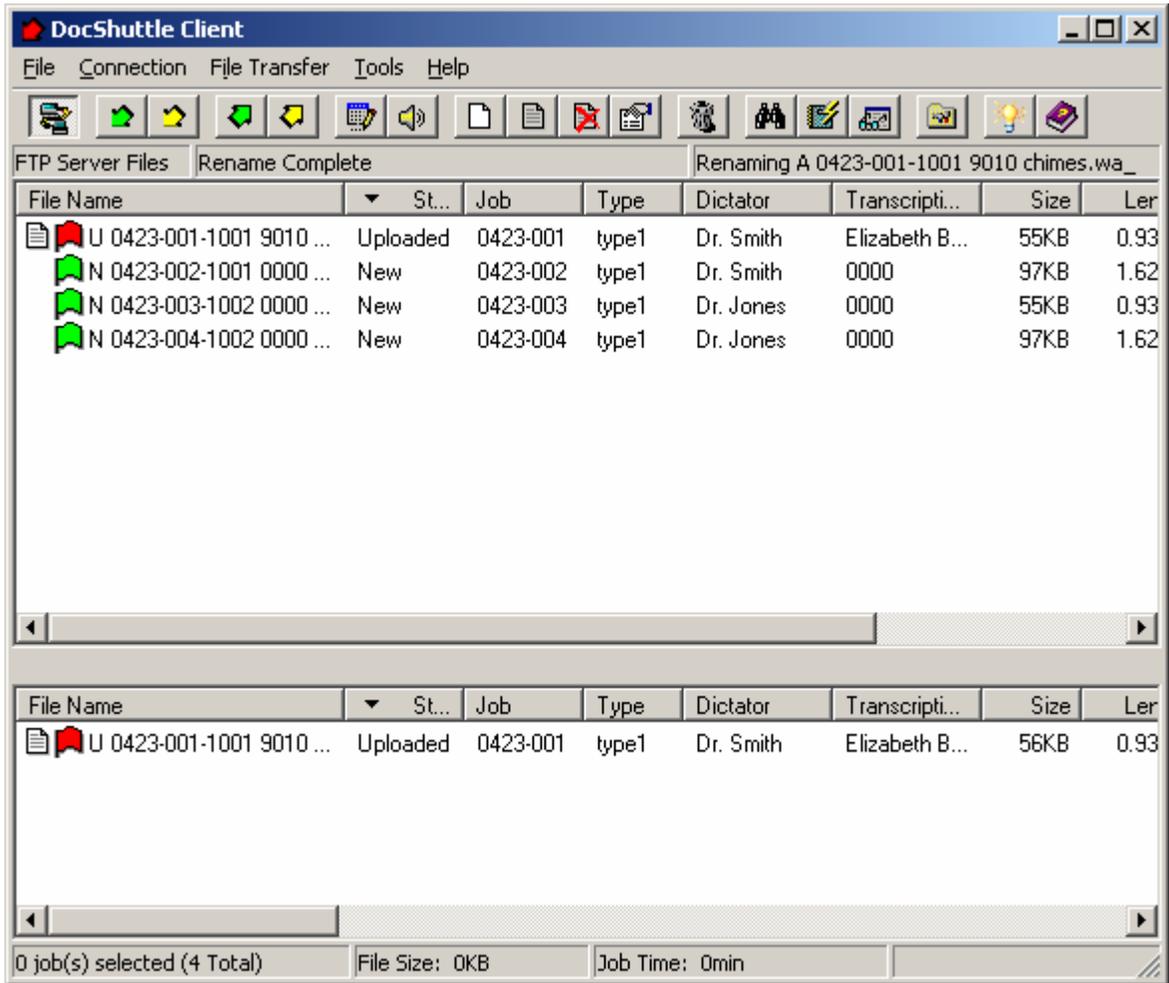
This means that the document file is available for download by DocShuttle Administrator and DocShuttle Dictator.

Retrieving Documents

In both DocShuttle Administrator and DocShuttle Dictator, you can monitor the status of a file in the top pane of the DocShuttle window. When the status of the file changes, and if the DocShuttle Client user is connected to the FTP site, then the status of the file on the FTP site will change as well.

Once the status of the file is U (for Uploaded), you can download the document into DocShuttle Administrator and DocShuttle Dictator. We will work with DocShuttle Dictator for now.

Download document

1. Open DocShuttle Dictator. You should see the file marked as U (for Uploaded) in the top pane, as in the figure below.
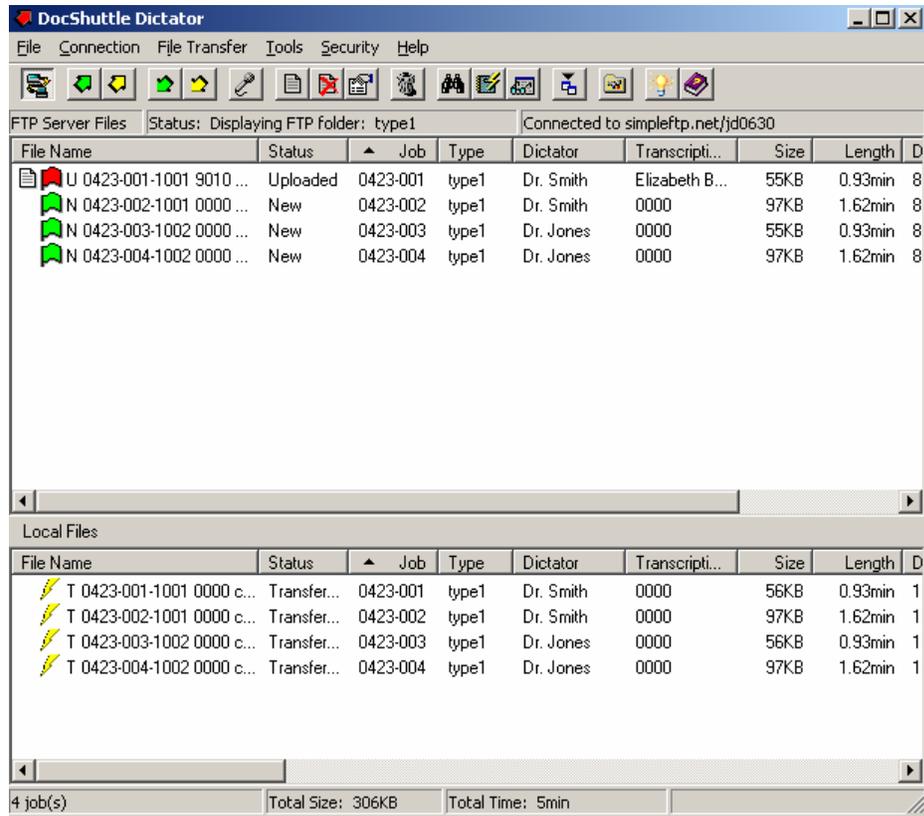
2. Click on the green down arrow to download the document file

3. You will be asked if you want to download the attachments. Click OK to proceed with downloading.

A Transfer Progress box will pop up, showing information for each attachment.

Once the transfer is complete, the status will be U (for Uploaded) in the bottom pane of DocShuttle Dictator, as in the figure below. This means that the attachment has been successfully saved to your computer.
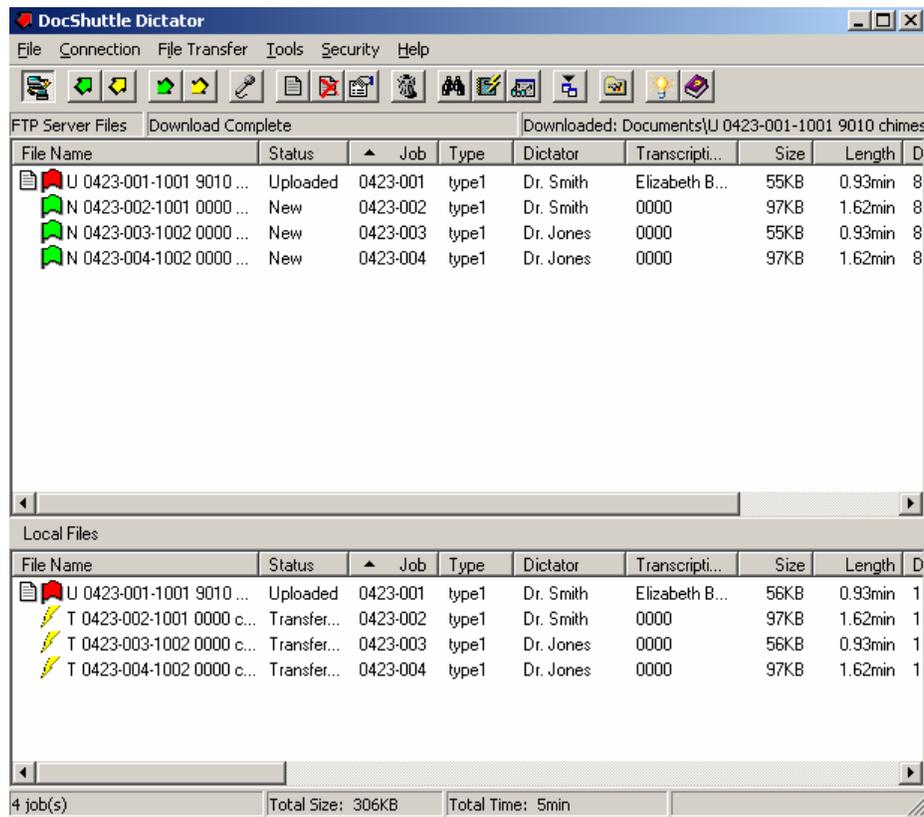
View Document

When the document file is downloaded in DocShuttle, it is saved to the Documents folder. The default location for this folder is C:\Program Files\Bytescribe\DocShuttle Dictator\Documents. You may also open this folder quickly through DocShuttle.

1. Click on the Tools menu in DocShuttle Dictator

2. Select View Document Folder. This will open the Documents folder.

3. You will see the contents of the Documents folder, including the file you just downloaded, as in the figure below.


```
E:\Program Files\Bytescribe\DocShuttle Dictator\Documents          _ □ ×
←  ▾  →  ▾  🗀  |  🔍  🗇  🌐  »  File  Edit  View  Favorites  Tools  »  Address  🪟
🗀 Done
📄 U 0423-001-1001 9010 chimesTest Document 1.txt
2 object(s)                                    18 bytes        🖥 My Computer
```
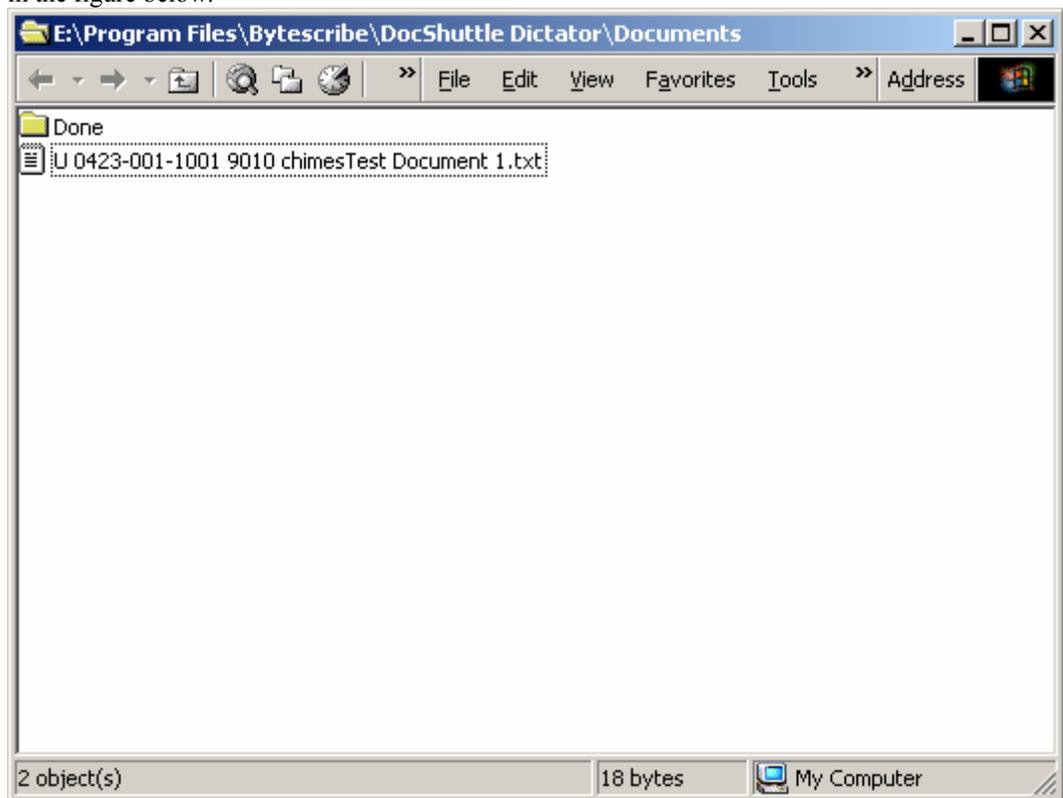
The document file will have the same name as the audio file (U 0423-001-1001 9010) with the original file name for the text document (Test Document 1) added to the end.

4. Double-click on the file to open it.

5. Verify that it is the file that you typed originally.

Print Document

You can print the document either by opening it and using your word processor's Print feature, or by right-clicking in the Documents folder and selecting Print.

Download document files automatically

Instead of manually connecting and downloading document files each time, you can schedule DocShuttle to do each of these things automatically, on a timer.

1. In DocShuttle Dictator, click on the Tools menu and select Settings

2. Go to the Local tab

3. The bottom section of the tab is labeled Scheduled Processes. In that section are several boxes. Click to place a check in the box labeled Schedule Downloads as in the figure below.
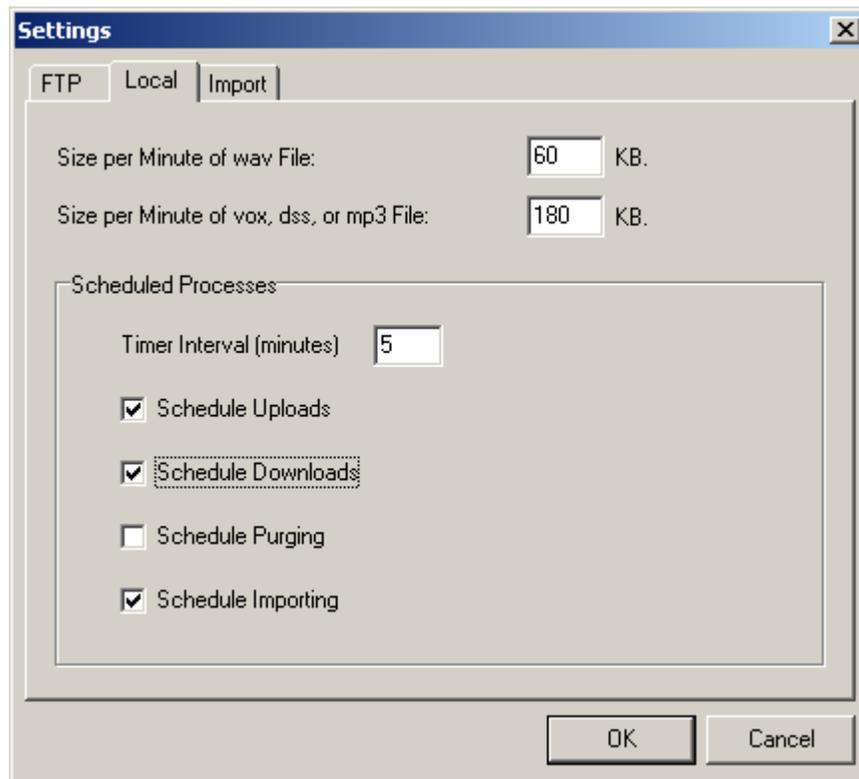
4. Click OK.

Now DocShuttle Dictator is set up to automatically connect to the FTP site and automatically download document files from the FTP site. When it is done, it will wait 5 minutes and then do everything again.

The computer will need to remain connected to the Internet, and DocShuttle Dictator will need to remain on in order for the scheduled processes to run.

Advanced Operations

Managing the Workflow with DocShuttle Administrator

Setting up for manual workflow management

You may have noticed that both of the dictators and both of the transcriptionists have access to the type1 folder. This way, the transcriptionists have access to the files as soon as they are up on the site.

At this point, it is possible to connect with DocShuttle Client, download the files, and begin transcription. However, there are a few features in DocShuttle Administrator that allow you to manage the workflow.

First, let's connect to the FTP site and confirm that you can see the newly uploaded files.

1. Open DocShuttle Administrator

2. Connect to the FTP site. When the connection is complete, you should see, in the top pane of the DocShuttle window, the 4 files that were uploaded earlier. Your DocShuttle Administrator window should look like the picture below.
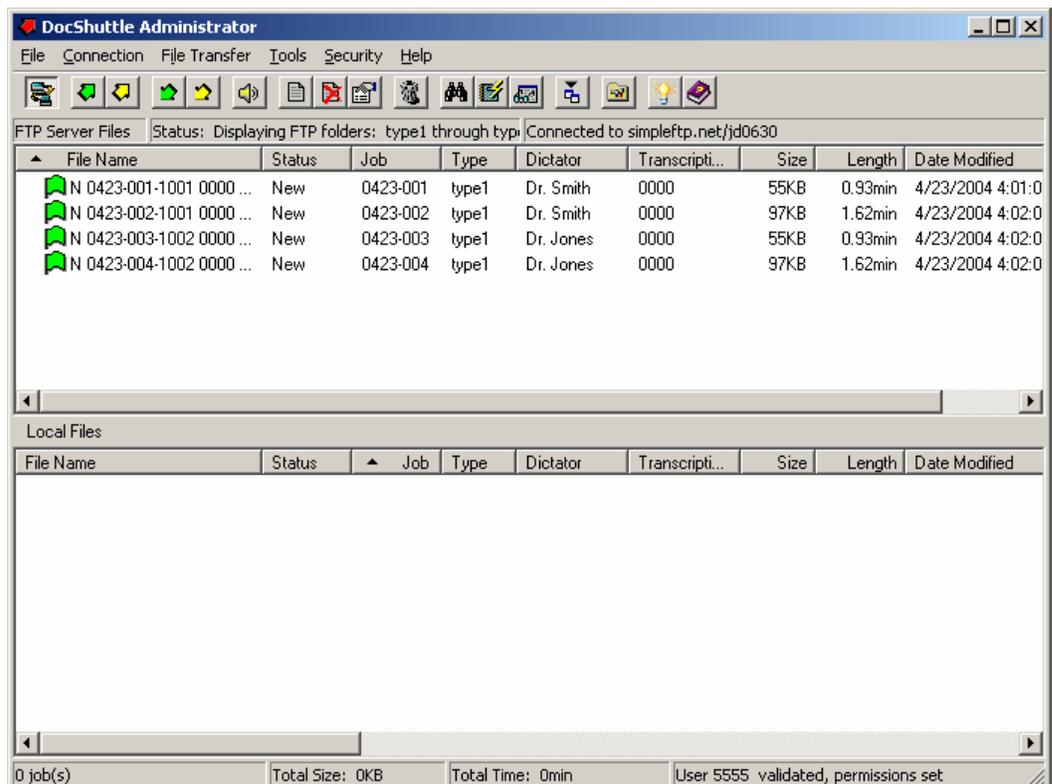
Note that DocShuttle Administrator has files in the top pane (on the FTP server), but not in the bottom pane. This means that DocShuttle Administrator does not have a copy of the files locally.

[Note: usually, DocShuttle Dictator and DocShuttle Administrator are installed on different computers. For this evaluation, they are installed on the same computer. But DocShuttle Administrator and DocShuttle Dictator store their local files in different folders, so they cannot "see" each other's files on the same computer.]

In some cases, you may want to get directly involved in the workflow. For example, let's say that Dr. Smith calls and tells you that she needs her files to be done immediately. So you'll want to move the files so that only your more experienced transcriptionist, working in job type 2, has access to the files.

Move files

1. While connected to the FTP site, find the two files that belong to Dr. Smith in the top pane.

2. Select both files by clicking on the first file, then press and hold the shift key while clicking on the second file.

3. Right-click on the files, and on the menu that pops up select Move Files To.

4. The Move Files box will appear, asking which Job Type you want to move the files to, as pictured below. Type **2** into the box and click OK.
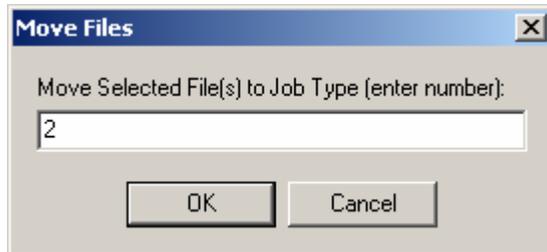
The Transfer Progress box will appear. When it is done, the files on the FTP site will be moved to the type2 folder and will show up as Job Type 2 files, as in the picture below.
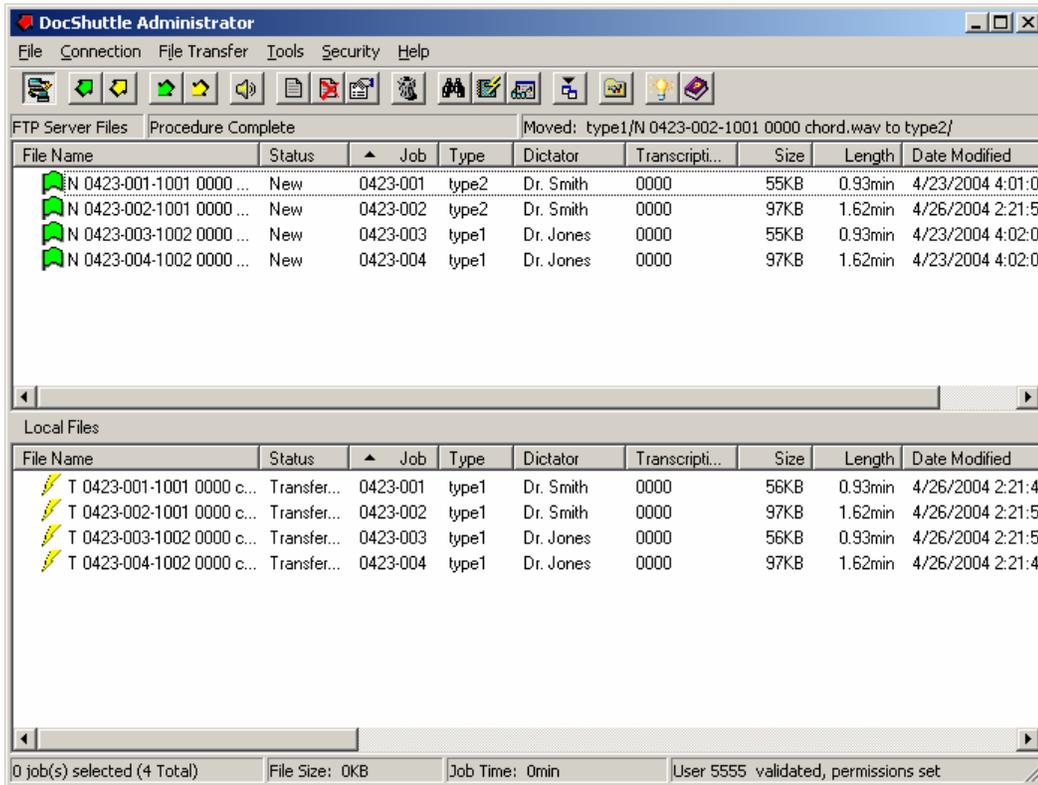
Note that the files will remain in type1 on the bottom. It is possible to change those files as well, but we will let those remain in type1, since we will need to move the files on the FTP site back to type1 for downloading when the documents are complete.

Archiving Files with DocShuttle Administrator

You may want to download the files locally and archive them. That way, if something happens to the files elsewhere in the workflow, you will have a copy of the dictation.

Manually download dictation and document files to DocShuttle Administrator

1. While connected to the FTP site, click on the green down arrow to download the files.

2. A box will pop up asking if you want to download the files. Click OK.

3. The Transfer Progress box will appear, providing information about the download, just as it did with the upload from DocShuttle Dictator.

4. When the download is complete, you should see the 4 files in the bottom pane of the DocShuttle Administrator window, just like in the picture below.
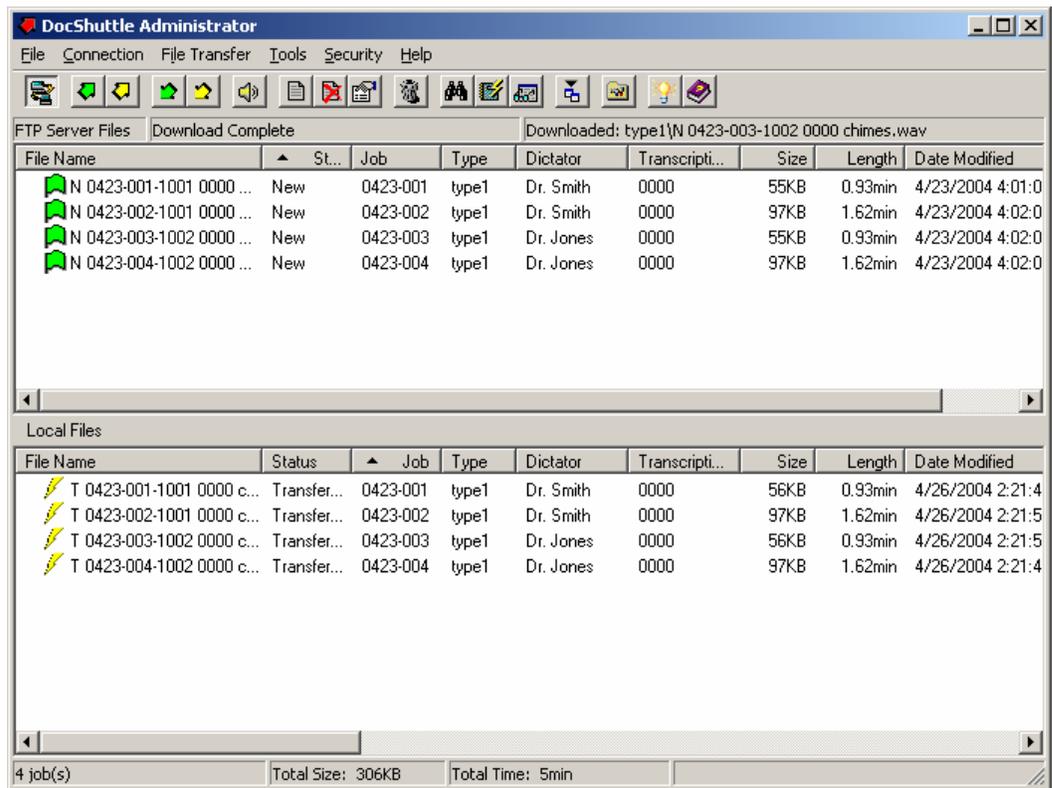
Note that there was no change to the status of the files on the FTP site. This is because the download function in DocShuttle Administrator is "transparent," as a management activity, and does not affect workflow.

Automatically download dictation and document files to DocShuttle Administrator

Instead of manually connecting and downloading files each time, you can schedule DocShuttle to do each of these things automatically, on a timer.

1. Open DocShuttle Administrator

2. Click on the Tools menu and select Settings

3. Go to the Local tab

4. The bottom section of the tab is labeled Scheduled Processes. In that section are several boxes. Click to place a check in the box labeled Schedule Downloads as in the figure below.
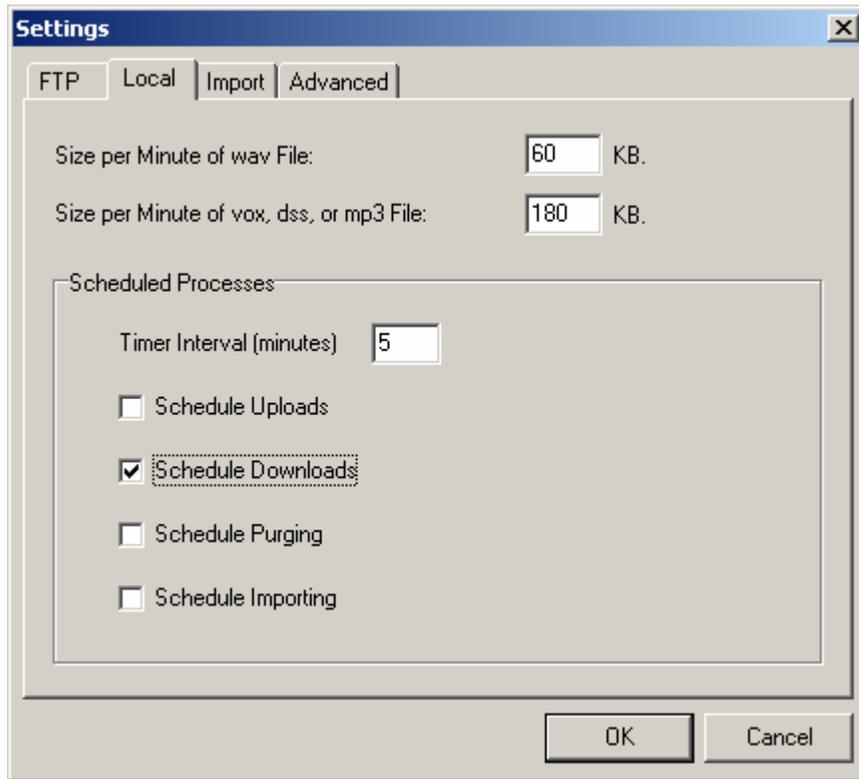
5. Click OK.

Now DocShuttle Administrator is set up to automatically connect to the FTP site and automatically download files from the FTP site. When it is done, it will wait 5 minutes and then do everything again.

The computer will need to remain connected to the Internet, and DocShuttle Administrator will need to remain on in order for the scheduled processes to run.

The QA process

DocShuttle makes it possible for a document file to be reviewed and edited by another transcriptionist without the original dictator being able to access the file before it's done. This is called the QA process.

The QA workflow adds some additional steps to the normal workflow described earlier:

- After attaching a document, but before uploading the document to the FTP site, the transcriptionist marks the file for QA.
- After marking the file for QA, the transcriptionist uploads the document file to the FTP server.
- A second DocShuttle Client user, called a QA Transcriptionist, downloads the dictation and document files and reviews them.
- Changes (if necessary) are made, the document is saved, and the QA transcriptionist uploads the edited document to the FTP server.

Send a file for QA

Download another file

To begin the QA process, the first transcriptionist needs to download another dictation file.

1. Open DocShuttle Client and connect to the FTP site

Once you are connected, you should see the three remaining New files in the top pane, as in the figure below.
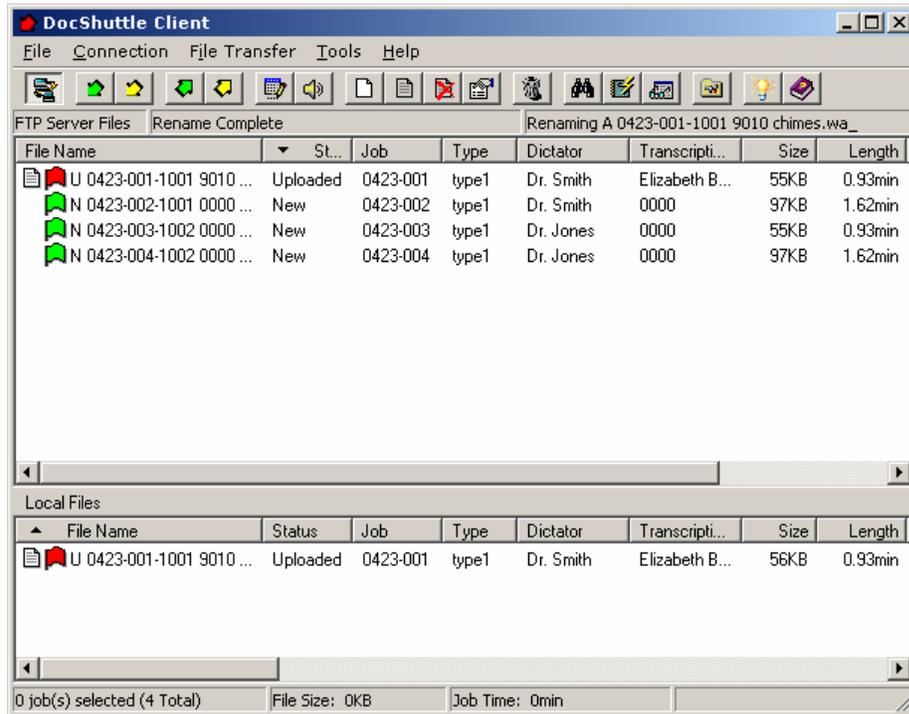
2. Click on the green down arrow again to download the next available dictation file.

3. You will be asked if you want to download the files. Click OK to proceed with downloading.

4. A Transfer Progress box will pop up showing the status of the downloading file.

5. Again, you will be limited to downloading one file. Click OK on the Maximum Limit Reached box.

Once the download is complete, you should see two files in the bottom pane of DocShuttle Client. One is marked U for Uploaded, and the most recent download will be marked D for Downloaded.

Attach new document

Just like with the Basic Operation, you will attach a document file to the dictation file. You can attach the same document created earlier, "Test Document 1.txt."

1. In the bottom pane of DocShuttle Client, find the audio file you downloaded.

2. Right-click on the audio file and select Attach External Document

3. The Attach File window will pop up. Go to the Desktop and select the document file you made, Test Document 1.txt. Click Open.

Note that the status of the audio file changes from a D (for Downloaded) to an A (for Attachment).

Manually mark file for QA

Once the document has been attached, you can mark it for QA. When a file is marked for QA, a QA transcriptionist has the opportunity to view and edit a document file before DocShuttle Dictator is allowed to download or view the document.

1. In the bottom pane of DocShuttle Client, right-click on the file marked A (for Attachment).

2. From the menu that pops up, select "Mark Attachment for QA," as in the figure below.
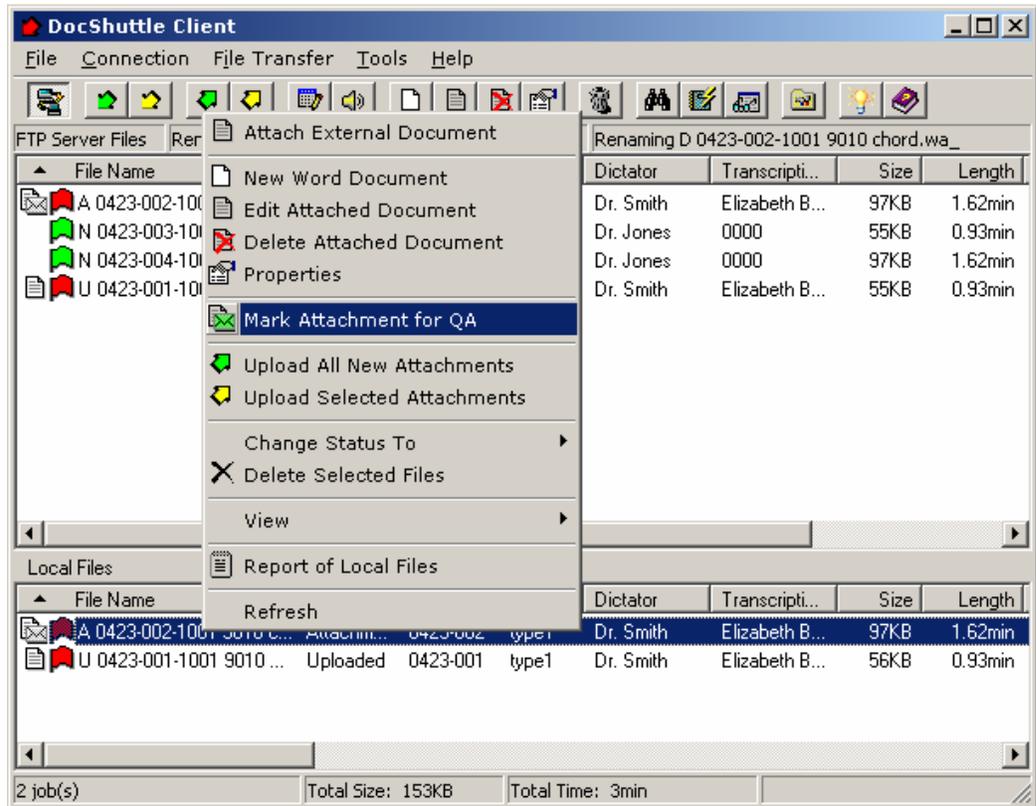
3. A box will pop up, asking "Do you wish to mark the attachment for QA?" Click Yes.

Note that the status of the audio file changes from A (for Attachment) to M (for Marked for QA), as in the figure below.
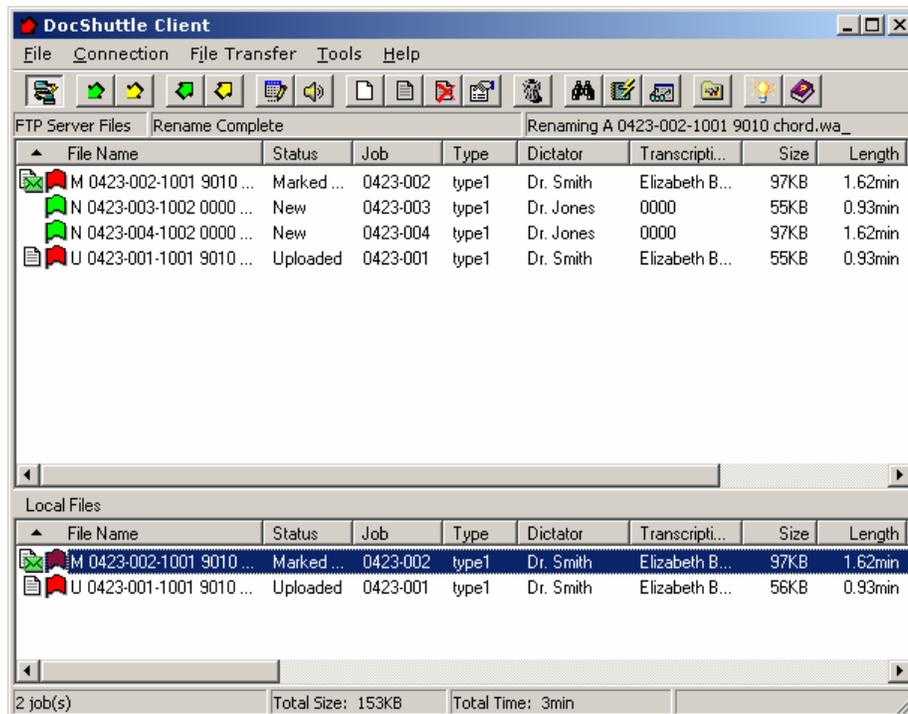
This means that a document has been attached to the audio file and has been marked for QA, but that the document has not yet been uploaded to the server.

Upload file for QA

Uploading attached document files for QA is exactly like uploading other document files.

1. In DocShuttle Client, click on the green up arrow

2. You will be asked if you want to upload the files. Click OK to proceed with uploading.

A Transfer Progress box will pop up, showing information for the document file.

Once the upload is complete, the file will change in status from M (for Marked for QA) to Q (for Sent for QA) as in the figure below.
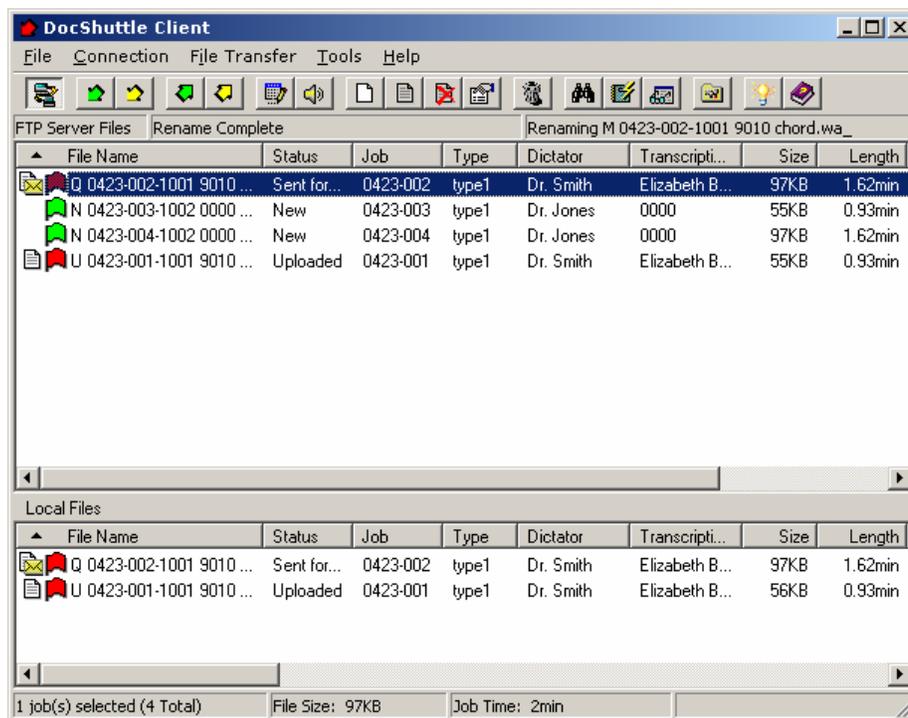
This means that the document file is available to be downloaded and edited by a QA Transcriptionist using DocShuttle Client.

Set up QA Transcriptionist

In order to be able to download files marked for QA, a QA Transcriptionist must be using DocShuttle Client and must have permission to download files marked for QA.

Remember that when you set up the permissions you set up a second transcriptionist user, 9500, who has QA permissions.

Since you cannot QA files on the same DocShuttle Client installation from which the documents were originally uploaded, you will need to install DocShuttle Client on a second computer for this tutorial. Please refer to the first chapter of this tutorial for information on installing DocShuttle Client.

Next, configure DocShuttle Client using the information for the QA Transcriptionist:

1. In DocShuttle Client, click on the Tools menu and select Settings

2. Click on the FTP tab and enter the exact same information in the first 4 boxes that you entered into DocShuttle Administrator and DocShuttle Dictator:

- Host Address: **simpleftp.net**

- Username: **sample**

- Password: **sample**

- Initial Directory: (your subfolder name)

- In the box labeled User's Job Type, enter **1**

- In the box labeled User's 4-Digit ID, enter **9500**, so that your FTP tab looks like the figure below.
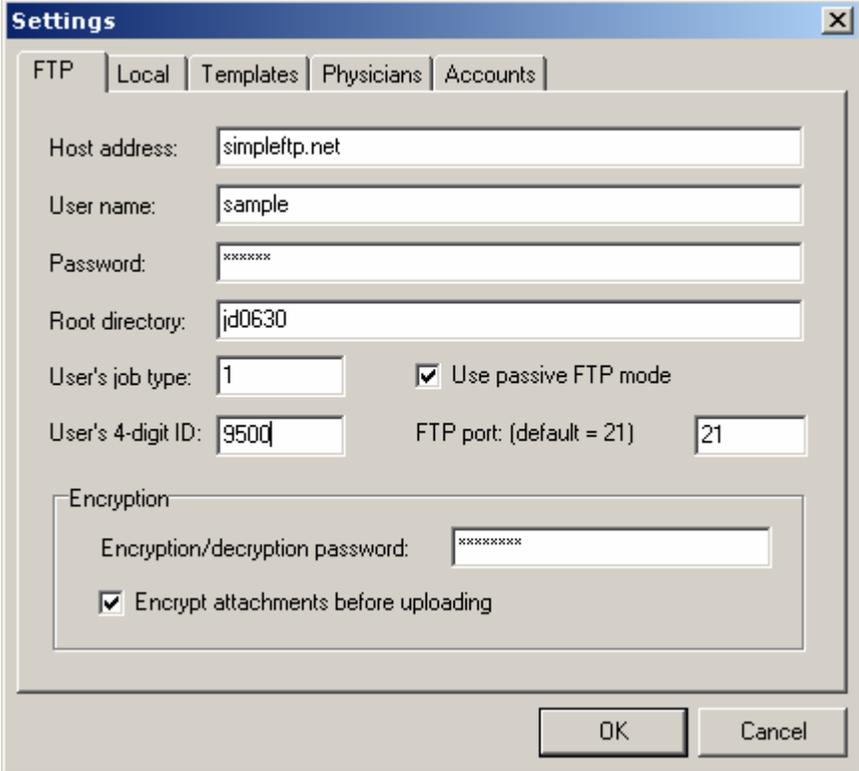
3. Do not make any other changes, and click OK to accept the information you have put in

4. Click on the Connection menu and select Connect to FTP.

As before, you should see the In Progress box pop up in the middle of your screen.

Once the box goes away, you should be connected to the FTP site. You should see the file marked Q (for Sent for QA) among the other files on the site, as in the figure below.
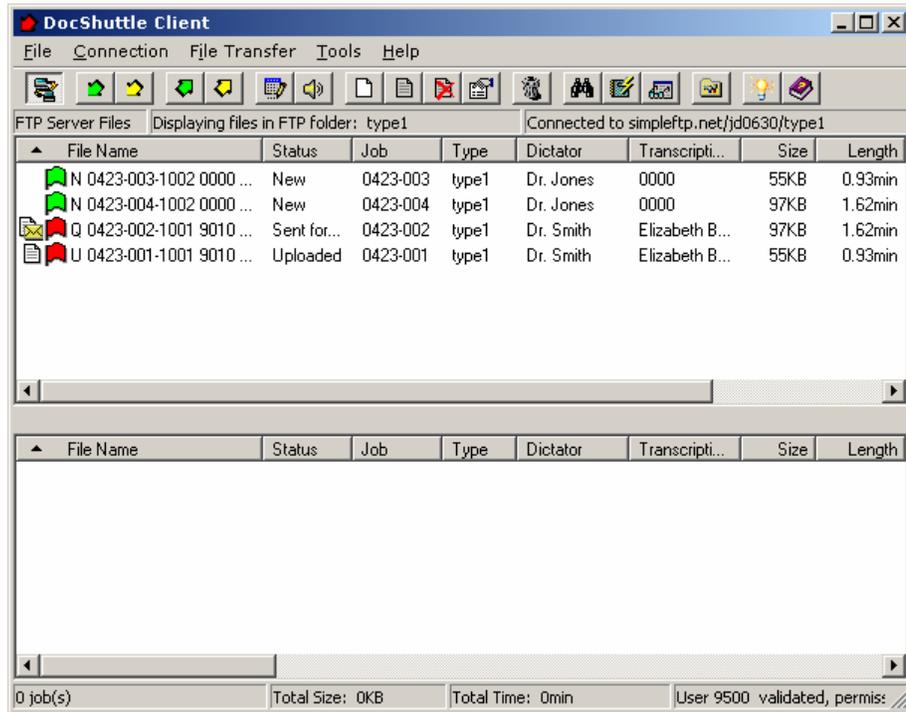
Perform QA on file

Download file for QA

In order to view and edit the document, you need to download the document to this computer.

1. In the top pane of DocShuttle Client, click on the file marked Q (for Sent for QA) to select the file.

2. Click on the yellow down arrow to download just the selected file.

3. A box will pop up asking "Do you wish to download the selected jobs?" Click Yes.

4. A Transfer Progress box will pop up showing the status of the downloading file.

5. Once the download is complete, you should see the downloaded file in the bottom pane of DocShuttle Client.

Note that the status of the file has changed from Q (for Sent for QA) to R (for Being Reviewed), as in the figure below.
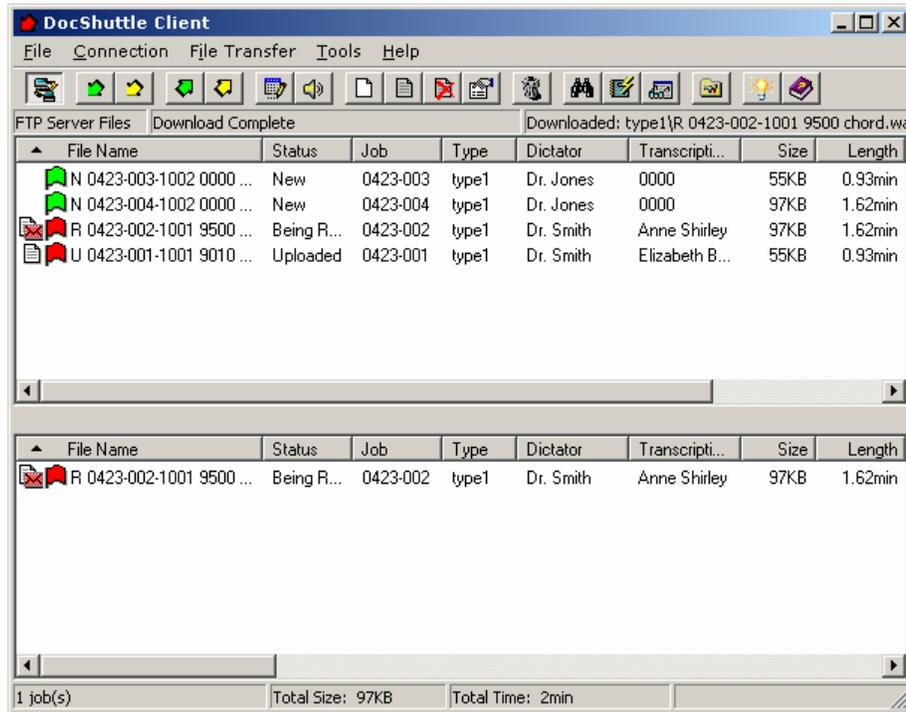
The Transcriptionist associated with this file has also changed, to reflect the user who has downloaded the file most recently.

Edit & save file

Now that the file is downloaded, you can open the document to view and edit it.

1. In DocShuttle Client, click on the Tools menu and select "View Document Folder."

2. An Explorer window will pop up, showing all of the files you have downloaded. Find the one with the exact same Job Number and User ID's as the audio file you just downloaded.

3. Double-click on the document file to open it.

4. Add a third line to the document, typing, "This is an edited document."

5. Click on the file menu and choose Save.

Note: it is very important to save the document with the exact same filename as the original document. Do not change the name. If you do, DocShuttle will not recognize the document file and you will not be able to upload it.

For that reason, it is best always to use the **Save** feature instead of the Save As feature in your word processor.

After saving the document, close it.

Upload completed document

Once the document has been edited and saved, you can upload it back to the FTP site so that it is available for retrieval by DocShuttle Dictator.

1. In DocShuttle Client, click on the file marked R (for Being Reviewed) to select it.

2. Click on the yellow up arrow to upload the file.

   Note: **Do not change the status of the file**. Changing the status will delete the edited document.

3. You will be asked if you want to upload the files. Click OK to proceed with uploading.

A Transfer Progress box will pop up, showing information for the document file.

Once the upload is complete, the file will change in status from R (for Being Reviewed) to U (for Uploaded) as in the figure below.
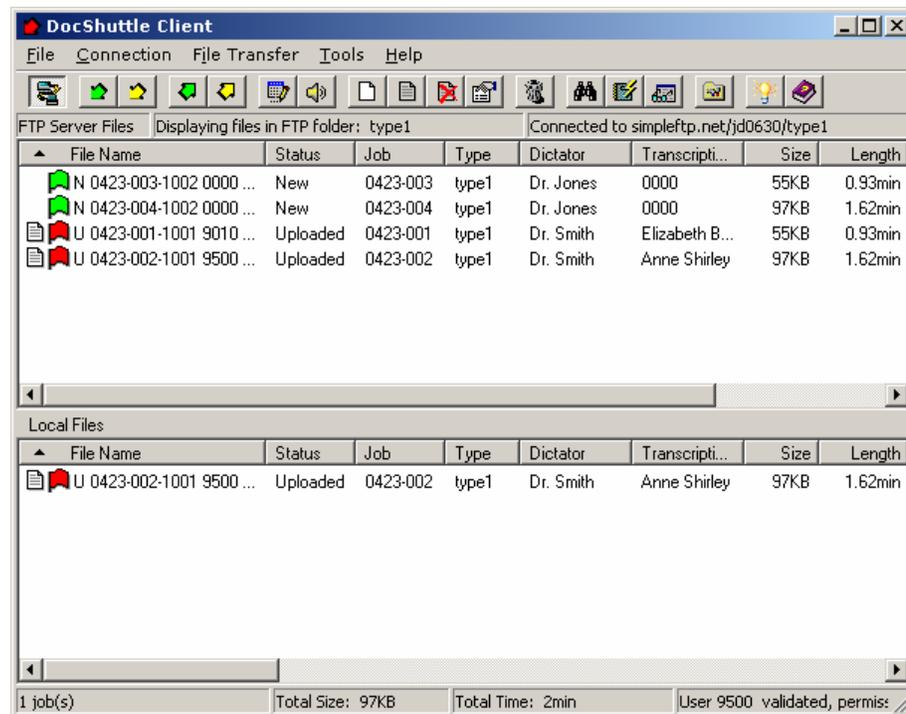
This means that the document file is available to be downloaded DocShuttle Dictator.

Automatically sending files to QA

Finally, it is possible to set up your original transcriptionist on DocShuttle Client so that all of the files that are attached and uploaded are sent for QA.

1. In DocShuttle Client, click on the Tools menu and select Settings

2. Click on the Local tab

3. At the bottom of the window there is a box labeled "Mark attachments for QA when attaching files." Click to place a check in that box, as in the figure below.
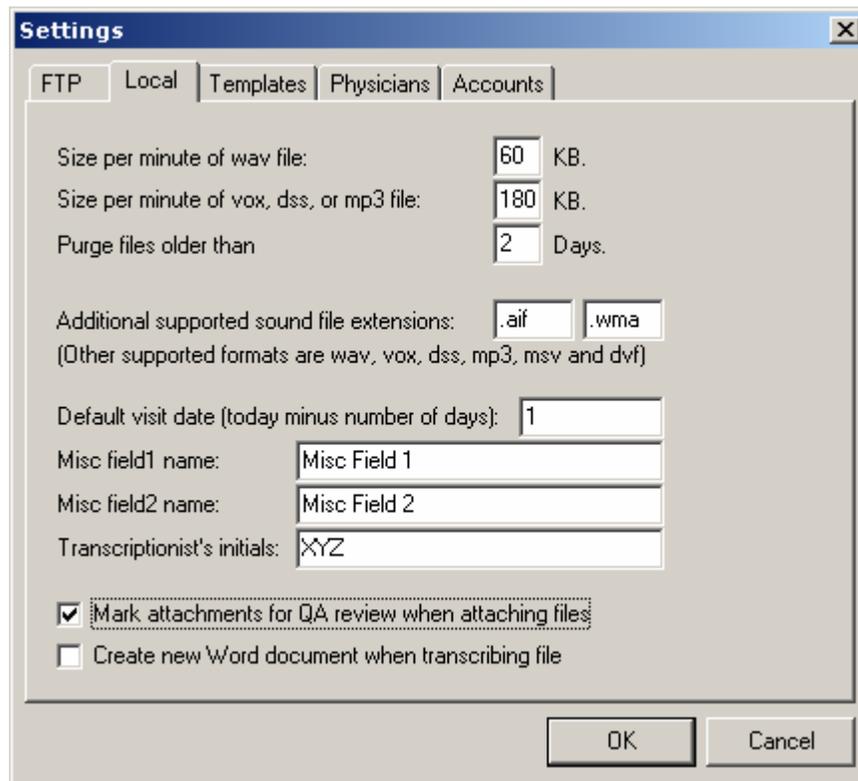
4. Click OK to return to the DocShuttle Client main screen.

5. Close DocShuttle Client.

Now DocShuttle Client is set up to automatically mark every file attached for QA. Once the file is attached it will have the status of M (for Marked for QA) instead of A (for Attachment). Once the file uploads, it will automatically have the status Q (for Sent for QA).

Appendices

Statuses in DocShuttle

Status list

T – Transferred: The dictation file has been uploaded to the FTP server by DocShuttle Administrator or DocShuttle Dictator and has not yet been downloaded into DocShuttle Client. (Note: This status will only be shown in the bottom pane of DocShuttle Administrator and DocShuttle Dictator)

N – New: The dictation file has been uploaded to the FTP server and has not yet been downloaded into DocShuttle Client.

D – Downloaded: Someone using DocShuttle Client has downloaded the dictation file.

A – Attachment: A document file has been attached to the dictation file in DocShuttle Client, but the document has not yet been uploaded to the server. QA is not being used.

M – Marked for QA: A document file has been attached to the dictation file, and the file has been marked for review by QA, but the document has not yet been uploaded to the server.

C – Complete: Someone using DocShuttle Client has marked the file Complete. No document is attached.

Q – Ready for QA: A document file has been attached to the dictation file, the file has been marked for review by QA, and the document has been uploaded to the server.

R – Being Reviewed: Someone using DocShuttle Client has downloaded a document that was sent for QA.

U – Uploaded: A document file has been attached to the dictation file and both are available for download.

Status progressions

Here are the statuses that each file should go through, in order, for each of the following DocShuttle workflows.

Documents not being sent back through DocShuttle: N → D → C

Documents being sent back through DocShuttle, QA not used: N → D → A → U

Documents being sent back through DocShuttle, QA being used: **N → D → M → Q → R → U**

Using DocShuttle as a demo

You may continue to use DocShuttle for evaluation purposes for 14 days from the time you first install it on your computer. Each DocShuttle module is fully functional for those 14 days. When the trial period is over, DocShuttle will display "0 Days Remaining" and you will not be able to connect to an FTP site.

Registering a purchased license

Once you have purchased a license for your DocShuttle software, you may register your existing installation of the software. There is no need to reinstall.

1. To register your DocShuttle installation, open the DocShuttle software.

2. A window will pop up containing the text of the license agreement. Read the agreement and then click in the circle labeled "I accept the terms of the license agreement." (If you do not accept the terms, cancel the registration and uninstall the DocShuttle software.) Click the Next button.

3. When the DocShuttle Administrator software starts, a window will pop up telling you that you have an unregistered version of the software, as in the figure below.

Type your name and your Product Serial Number into the appropriate boxes in the window. Then click Register Online.

4. A small window will pop up saying "Registration Successful!" Click OK.

5. The Registration Results window will pop up, as in the figure below.
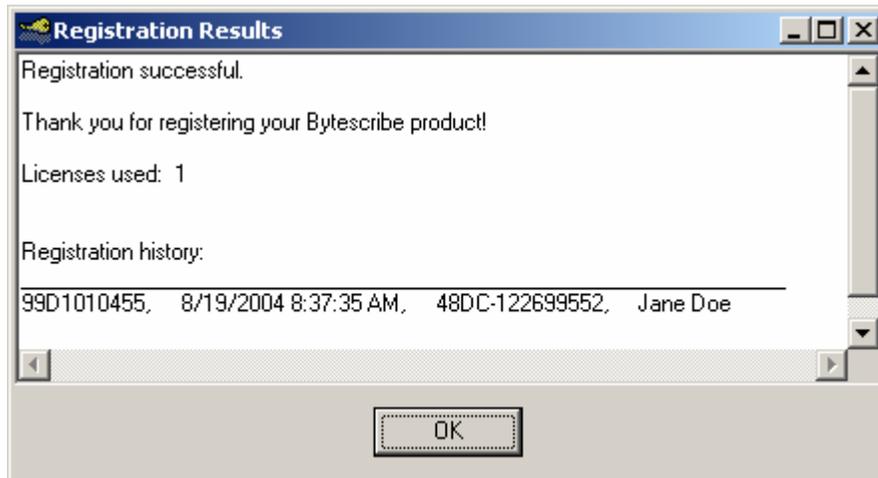
6. This window shows the number of times your license has been used to register your DocShuttle software. Click OK.

You may see the "Did you know?" window again.

Finally, the DocShuttle Administrator window will open. Note that the blue bar at the top of the DocShuttle window no longer says "Unregistered Version." Your DocShuttle Administrator is properly registered

If you have licenses for DocShuttle Client and DocShuttle Dictator, then you may register using the same procedure. Do not use the same Product Serial Number to register different modules of the software.

Registration FAQ

1. Where do **I go to register my software?**

To register your DocShuttle software, please go to http://www.bytescribe.com/register.

2. When I installed my software on a new computer, my Registration Number changed. What happened?

The Registration Number and Confirmation Code are different for each computer on which the software is installed. Please take note of the new Registration Number and register online to get the new Confirmation Code.

3. I had to **reinstall Windows on my computer, and my Registration Number changed. What happened?**

Sometimes, when you reinstall or upgrade Windows on your computer, the Registration Number and Confirmation Code will change. Please take note of the new Registration Number and register online to get the new Confirmation Code.

4. I registered and got a Confirmation Code, but when I put it in I get an error message saying "Invalid Code." Why?

There are three things that might cause you to receive an invalid Confirmation Code.

The first is that you may be using an old Registration Number. The Registration Number and Confirmation Code are different for each computer on which the software is installed. Even if you use the same disk to install the software on different computers, you will get different Registration Numbers. Please make sure that you are using the new Registration Number when registering.

Second, please check to see if there is a hyphen (-) somewhere in the Registration Number. If there is, that will affect the Confirmation Code. If the Registration Number contains a hyphen (-), then so will the Confirmation Code.

The third possibility is that the Registration Number was typed incorrectly. Please double-check the Registration Number that is on your screen and make sure that it exactly matches the number that was entered online.

5. When I go to register online, I get the message that says "You have exceeded the number of licenses." What does that mean?

Software purchased from Bytescribe is a single user license intended for one user. The Product Serial Number that comes with your Bytescribe software can be used to register up to 3 times. If you have exceeded this number of registrations, you will need to purchase a new license or contact Bytescribe and request that the Product Serial Number be reset so that you can register online.

6. I change computers and/or re-format my computer a lot. I will need to register my software several times. Is there a way to avoid the registration process?

Yes. Bytescribe has a product called a USB Dongle (hardware license key), which plugs into a USB port on your computer. This dongle contains the registration information necessary for the Bytescribe software and it can be transferred from one computer to another. As long as the USB Dongle is plugged in, your software is registered. If you already have a valid software license, you may order a dongle from our online store. For more information, contact Bytescribe at (408) 987-5628 or send an email to register@bytescribe.com .

7. I don't have a Product Serial Number. Can I register?

Bytescribe requires that you have a valid Product Serial Number in order to register or receive upgrades. If you do not have a Product Serial Number, you will need to purchase a license in order to receive one. (Bytescribe began using Product Serial Numbers in April of 2001. If you purchased your Bytescribe software before April 2001, then you will need to purchase a new license in order to receive a Product Serial Number.)

8. I want to buy/sell a Bytescribe software license. Is it transferable?

No. When a customer purchases a software license, the software must be registered on the customer's computer. Once registered, this software cannot be transferred to a different party. Bytescribe provides technical support to the purchaser of the software license.

9. When I try to register DocShuttle, I get the message "Connection Timed Out." How can I complete the registration process?

First, check your DocShuttle software version. Click on the Help menu and select About. If you have a version earlier than 4.0.5, you will need to update your software. You can download DocShuttle version 4.1 from our website at http://www.bytescribe.com/docshuttle/version4/index.htm. Please call Bytescribe at 408-987-5628 or send an email to register@bytescribe.com with your Product Serial Number for the installation password.

Second, check to see that you are connected to the Internet. Unlike WavPlayer and SwiftText, DocShuttle needs to go online to complete registration. So try connecting to a web page that you don't normally access and make sure that it works.

Finally, try checking the little box on the registration screen that says "Register Through Firewall."