Client

DocShuttle™
Internet Transcription Software

Client Manual
Software Version 5

DocShuttle is a simple and affordable solution for managing medical dictation and transcription over the Internet.

bytescribe
Dictation & Transcription Solutions
www.bytescribe.com

DocShuttle Client

by Bytescribe, Inc.

Additional Documentation

For more information on using DocShuttle Client, please visit:

- **DocShuttle Frequently Asked Questions (FAQ's)** — go to www.bytescribe.com/faqs.htm

- **DocShuttle Client Help Files** — click on the **Help** menu and select **Contents**

- **DocShuttle Tutorial** — go to www.bytescribe.com/support

- **Supplemental Guides** — go to www.bytescribe.com/support

Personal Technical Support

To contact Bytescribe for additional technical support:

- **By Phone** — (408) 987-5628

- **By E-mail** — docshuttle@bytescribe.com

## Upgrades

For product upgrades:

- **Within DocShuttle Client —** click on the **Help** menu and select **Check For Upgrades**

- **Bytescribe Website** — visit www.bytescribe.com/downloads for the installation file for the newest version of DocShuttle Client

Product Overview

DocShuttle Internet Transcription Software is an affordable and easy-to-use suite of software products used to manage workflow of dictation and transcription over the Internet.

DocShuttle features:

- Automated transfer of voice files and text documents

- Complete tracking and management

- Secure, automated encryption of audio and document files

- Integration with dictation systems and handheld recorders for a virtually unlimited number of remote dictators and transcriptionists.
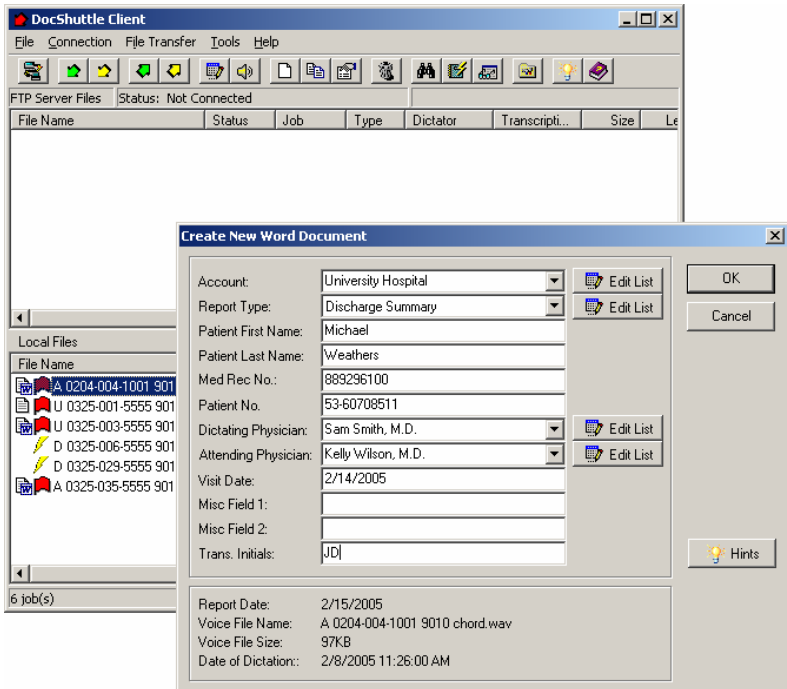
DocShuttle modules

A full DocShuttle system is comprised of three modules: Administrator, Client and Dictator.
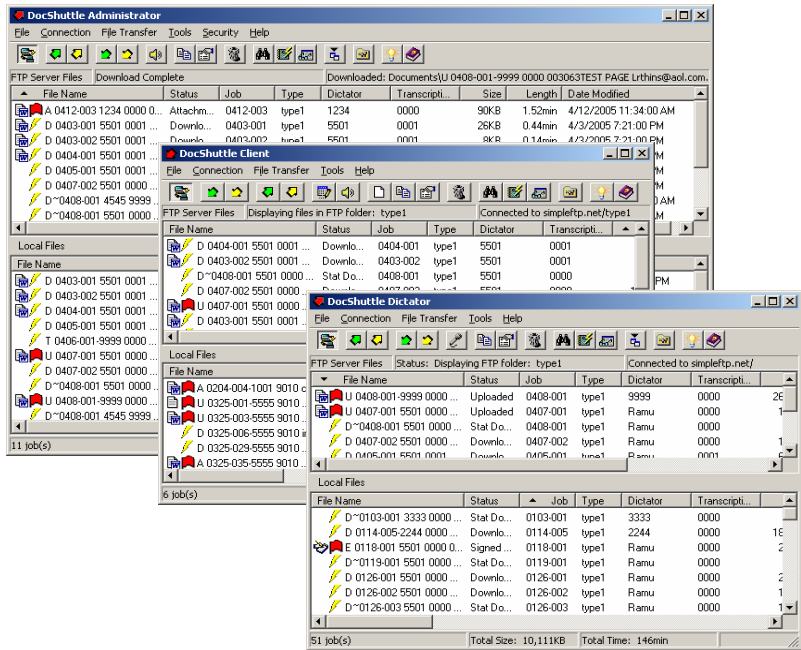
DocShuttle Administrator is the central administrative module for the transcription company or facility using the system.

DocShuttle Administrator is used to set up the FTP site, set security and user permissions, manage workflow, upload files from dictation systems and/or handheld recorders, and archive files.

DocShuttle Client is the transcribe module, and is used by each remote transcriptionist to download and decrypt dictation files. It can also be used to send the completed documents to an editor or QA transcriptionist, back to the transcription office, or directly to the dictator's office.

DocShuttle Dictator is the dictate module. DocShuttle Dictator can be used to automatically upload dictation files to the FTP site for transcription and to download documents for printing. Each installation of DocShuttle Dictator can support up to 5 individual dictators with unique user ID's.

QuickStart Guide for DocShuttle Client

Step 1. Check your Connection Settings

First, check your connection settings in DocShuttle Client by clicking on the **Tools** menu and selecting **Settings**. Make sure you have a valid setting for **Host address**, **User name** and **Password**. If there is a subfolder on your FTP server that you will be using, enter that folder name in the **Root Directory** field of the settings window.

Also check with your administrator for the **User's Job Type** and **User's 4-Digit ID** settings.

Note: If you are having problems connecting to your site, try connecting to the sample FTP site using the settings that came with the software.

Step 2. Connect to the FTP Site

Once you have checked your settings, click the **Connect** button in the top left corner of the DocShuttle window, or click on the **Connection** menu and select **Connect to FTP**. The DocShuttle software will attempt to connect to the FTP site.

If DocShuttle is able to connect without error, there will be a status message at the top of the window showing "Logged in" and DocShuttle will display any available files on the site in the top pane of the DocShuttle window.

Note: If you have trouble connecting to the FTP site, please view the Troubleshooting section.

Step 3. Download Voice Files from FTP Site

Note: This guide assumes that your administrator has already set up your FTP site and uploaded some voice files to your working "type" folder. If you connected properly in the previous step and if some voice files appear in the top pane of your DocShuttle window, you are ready to download voice files.

To download the voice files from the FTP site, click the button with the green arrow pointing down, or click the **File Transfer** menu and select **Download All New Dictations**. You can also download selected files by dragging them from the top pane of the DocShuttle window to the bottom pane using the mouse. The file transfer should begin and a progress bar should appear showing the current status.

Once the files have been downloaded from the FTP site, the files will appear with a Downloaded status in the bottom pane and a yellow icon will appear next to all new files.

Note: If there is an error downloading, please see the Troubleshooting section.

Step 4. Listen to Voice Files and Create Documents

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

If you are using the Bytescribe WavPlayer to transcribe your audio files, then the audio file will open the WavPlayer. If you do not have Bytescribe's WavPlayer installed, please see the Transcribing Downloaded Voice Files section later in this manual.

If you are using Microsoft Word as the word processor, the **Create New Word Document** window will also appear. Select the appropriate report type and complete the fields in the form. Click **OK** to create a new Word document. Once the document has been completed, save the document and close the WavPlayer.

*Note: If you will not be using Microsoft Word as the word processor, click on the **Tools** menu, select **Settings**, then click on the Local tab and find the checkbox labeled **Create new Word document when transcribing file**. Click in that box to disable Automatic Document Creation.*

Step 5. Attach External Documents

If you wish to attach an external document to the current job, right-mouse-click the voice file in the lower pane of the DocShuttle window and select **Attach External Document** from the popup menu that appears. A dialog box will appear prompting you to attach the document you have completed. Find the file and click **Open** to attach the file. DocShuttle supports attaching multiple text documents.

Step 6. Upload the Completed Text Documents

Once the text documents have been typed and attached, you may upload the attachments to the FTP site. To upload all new attachments, click the button with the green arrow pointing up, or click the **File Transfer** menu and select **Upload All New Attachments**. Any completed text documents will be transferred to the FTP site where the administrator will receive them.

Using DocShuttle Client

DocShuttle Client is the transcriptionist's module. It is used to download and decrypt dictation files and to send completed documents to an editor or QA transcriptionist, back to the transcription office, or directly to the dictator's office.
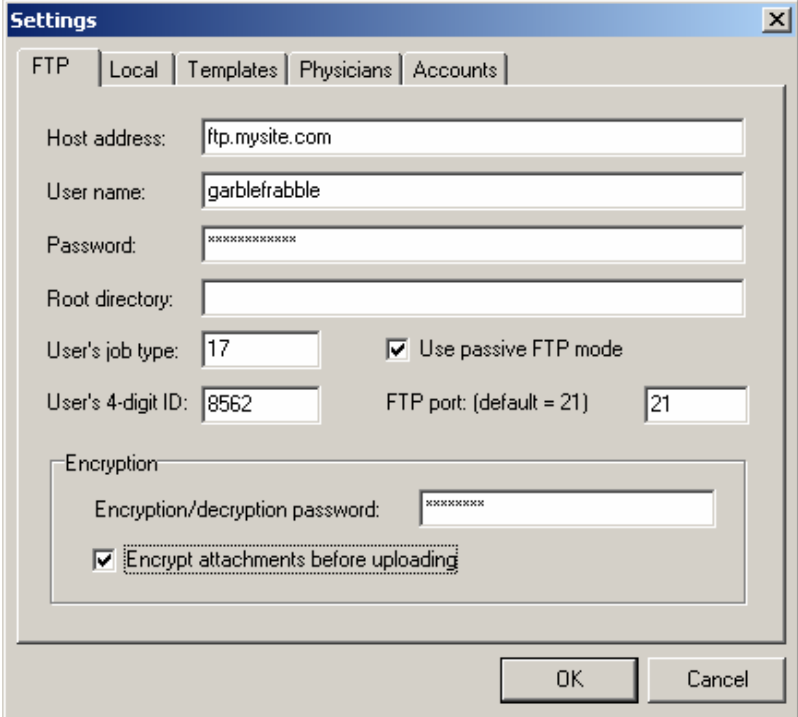
DocShuttle Client integrates with the Bytescribe WavPlayer to allow the transcriptionist to play standard sound files such as WAV, VOX, MP3 or Olympus DSS.
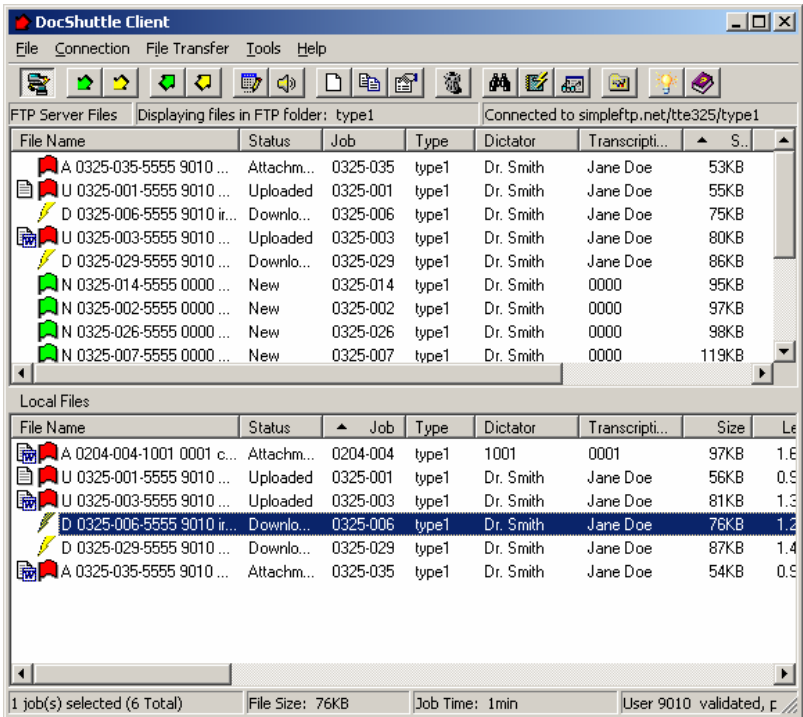
Any type of transcription document such as Microsoft Word or WordPerfect can be used. Once a dictation job has been completed, the document is attached and uploaded by the transcriptionist. DocShuttle Client automatically updates the status of each file on both the local computer and FTP site as the transcriptionist completes each job.

Configuring DocShuttle Client

To configure the settings of DocShuttle Client, click **Tools** menu and select **Settings**. This will display the **Settings** window.

Check with the system administrator for the settings in this window. The **Host address**, **User name** and **Password** must be entered in order for DocShuttle Client to be able to connect to the FTP site. If dictation files are stored in a subfolder on the FTP site, the subfolder path should be entered in the **Root Directory** field. These four settings will usually be the same for each DocShuttle Client user

The **User's Job Type** and **User's 4-Digit ID** fields should also be filled in, and may be different for each user.

Other configuration settings need to be set under the **Local** tab. File lengths of voice files displayed in the DocShuttle window are calculated based on the settings shown here. Here you may also set the number of days after which files will be purged if using the Purge function. Other default settings can be defined including two miscellaneous patient fields.

If the Bytescribe WavPlayer and Microsoft Word are being used, and if you wish to use Automatic Document Creation, check the **Create new Word document when transcribing file** checkbox.
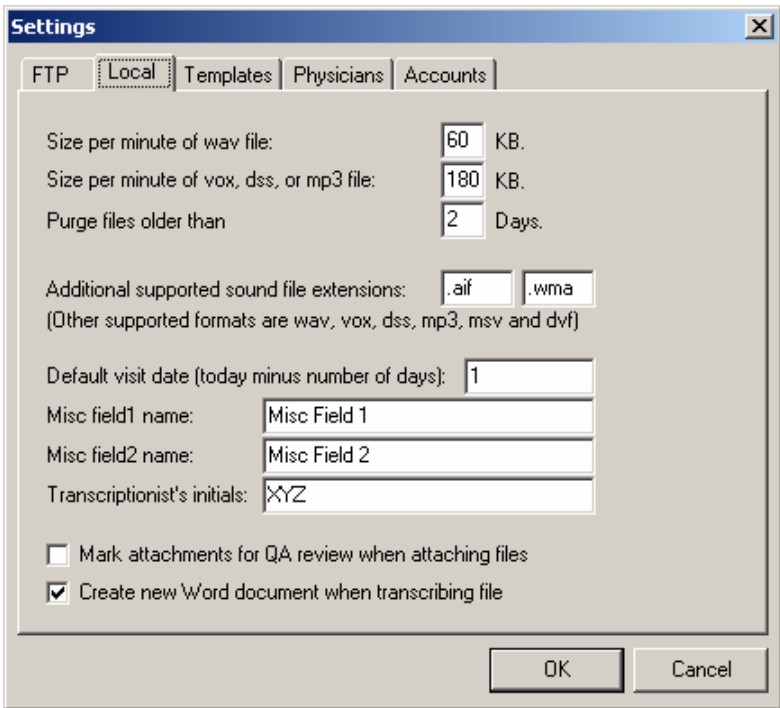
Connecting to the FTP Server

Once the proper settings have been entered into the Settings window, the transcriptionist can connect to the FTP server by clicking the **Connect** button in the top left corner of the DocShuttle Client window, or by clicking the **Connection** menu and selecting **Connect to FTP**.

Transferring Files using DocShuttle Client

The DocShuttle Client window has two panes. The top pane displays files on the FTP server. The bottom pane displays files on the local computer. Files are downloaded from the FTP server to the local computer either by dragging files from the top pane to the bottom pane or by clicking the

arrows in the button bar at the top of the window. As files are being trans-ferred, a progress bar appears showing the status of the current download. Encrypted files are automatically decrypted by the software as they are being downloaded.

Transcribing Downloaded Voice Files

Once files have been downloaded to the local computer, the files can be played and transcribed by double-clicking on selected files. If the Bytescribe WavPlayer is installed on the computer, the WavPlayer will launch and play the voice files. The WavPlayer is capable of being con-trolled with a foot pedal.
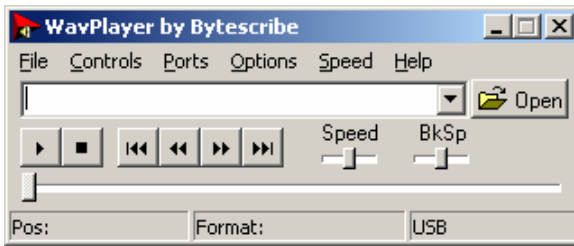
If you do not have the WavPlayer installed, double-clicking on the file will open the file in Windows Sound Recorder, which cannot be con-trolled by a foot pedal. To play the file in a player other than Sound Re-corder, point your player program to C:\Program Files\Bytescribe\ Doc-Shuttle Client\TypeX, where X is the job type of the file. Regardless of which player is used, the files will be heard through a headset or speakers connected to the computer's sound card.

If using Automatic Document Creation, the **Create New Word Docu-ment** window will also appear, prompting for information to be inserted into the document.

The **Account** and **Report Type** can be selected from a drop down list. The **Report Type** field determines the template that will be used to create the Microsoft Word document. Report Templates can be created and customized using the **Edit List** button beside the **Report Type** field.

Once all fields have been filled, clicking the **OK** button will create a new Word document using the specified template.

Once a document file has been created or attached, a document icon will appear in the DocShuttle window next to voice files. Additional docu-ments can be created, edited, added or deleted using the corresponding buttons in the button bar at the top of the DocShuttle window.

Double-clicking on files that already have attachments will merely play the sound file without launching the document creation process again.

Create New Word Document

Account:	University Hospital
Report Type:	Operative Report
Patient First Name:	Michael
Patient Last Name:	Weathers
Med Rec No.:	889296100
Patient No.	53-60708511
Dictating Physician:	Sam Smith, M.D.
Attending Physician:	Kelly Wilson, M.D.
Visit Date:	2/14/2005
Misc Field 1:	
Misc Field 2:	
Trans. Initials:	JD

Report Date: 2/15/2005
Voice File Name: A 0204-004-1001 0001 chord.wav
Voice File Size: 97KB
Date of Dictation:: 2/8/2005 11:26:00 AM

Using Templates

A list of available templates can be can be found by clicking on the **Tools** menu, selecting **Settings**, and choosing the **Templates** tab. From this location, templates can be added, edited, and deleted.

Settings

FTP | Local | Templates | Physicians | Accounts

Clinic Note
Consultation
Discharge Summary
History & Physical
Operative Report

Add
Edit
Rename
Copy
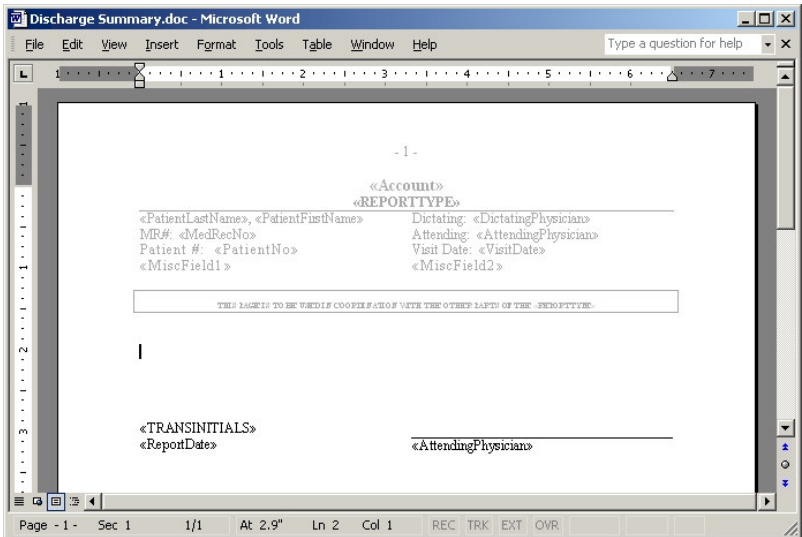Delete
Import
Set Default

Default: Discharge Summary

Download
Upload

Templates can also be shared with other transcriptionists within the same company by using the **Upload** and **Download** buttons. A supervisor can create a master copy of the templates and **Upload** the templates to the FTP site. Other transcriptionists can then use the **Download** button to receive selected templates. One of the templates can be set as the default template.

To modify a template, go to the **Templates** tab, highlight a template, and click the **Edit** button. The template will open in Microsoft Word for editing.

Fields that will be merged with patient information appear with brackets surrounding them, e.g. <<PatientLastName>>. All fields and text can be rearranged in the template and any text can be added. Once changes have been completed, save and close the Word document.

Note: At least one field must be present in the template for DocShuttle to be able to use the template.

Physician and Account Lists

Physician and Account lists can also easily be modified. Click the **Tools** menu , select **Settings**, and click on the **Physicians** or **Accounts** tab. Use the **Add**, **Edit**, and **Delete** buttons on this screen to modify physician entries.

The Physician and Account lists can be shared by transcriptionists within the same company. A supervisor can create a master list and use the **Upload** button to upload the list to the FTP site. Other transcriptionists can then use the **Download** button to import the entire list.
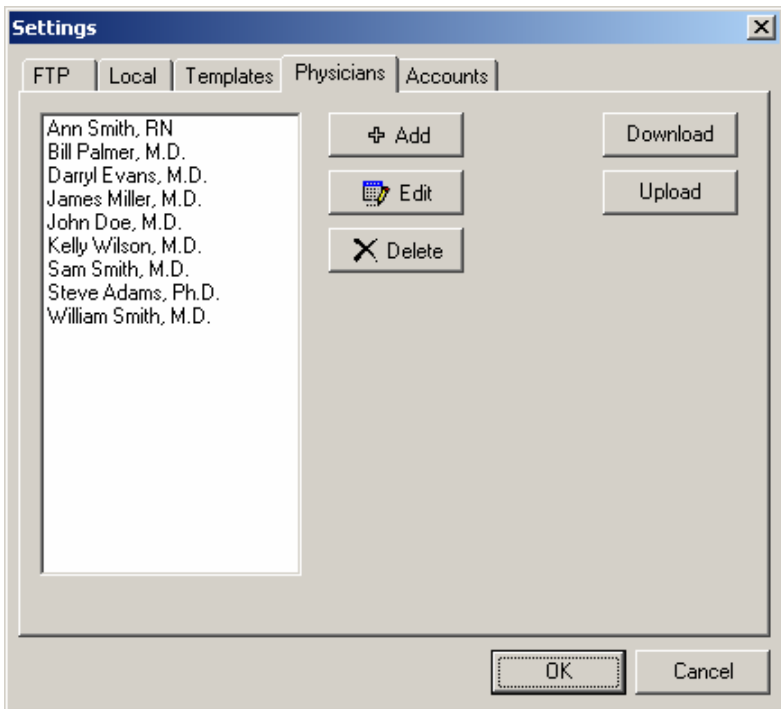
File Management and Workflow

File management using DocShuttle Client is easy because the status of all files can be seen by any DocShuttle module that has access to the type folder.
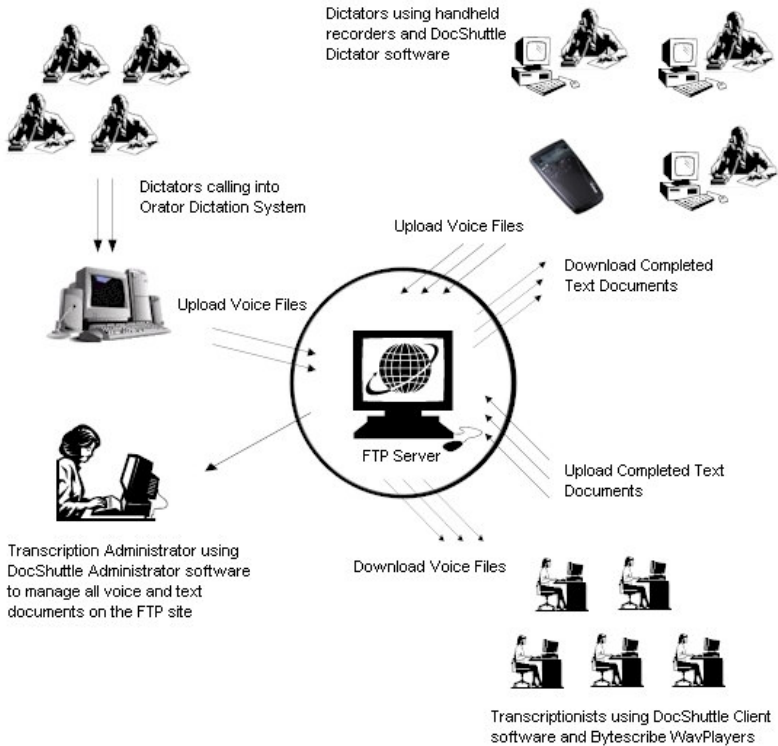
When files are first accessed on the FTP server by a transcriptionist, they will have either a New or Stat status and will be marked with a green or yellow flag. Once a file is downloaded, the status will be changed to Downloaded and it will be marked with a yellow lightning bolt. As a file is completed by the transcriptionist, it will have a Completed status and will be marked with a red flag.

If a transcriptionist attaches and uploads a document, the file will have an Uploaded status and will be marked with a document icon. The status of all local files is automatically synchronized with the files on the FTP server.

The status of files in DocShuttle is also shown using colorful, easy to read icons.   There are two columns of icons. The left column indicates the status of the attached text document. The right column of icons indicates the status of the voice file.

Icon	Code	Status
🟡	S ...	Stat
🟢	N ...	New
⚡	D ...	Downloaded
📄🚩	A ...	Attachment
📄🚩	M ...	Marked for QA
📄🚩	Q ...	Sent for QA
📄🚩	R ...	Being Reviewed
📄🚩	U ...	Uploaded
📄🚩	e ...	Signature Pending
✍️🚩	E ...	Signed Electronically
🖨️	L ...	Locked

Files that have not yet been transcribed (N, S, D) will not have an envelope icon, since there is no document attached yet.

Voice files that have been completed by a transcriptionist (A, M, Q, R, U) will be marked with a red flag.

In addition, files that are being reviewed for quality assurance purposes (M, R, Q) will have a colored envelope icon.

The Uploaded status (U) represents a file that is fully complete. Files with this status have a red flag and white document icon beside them.
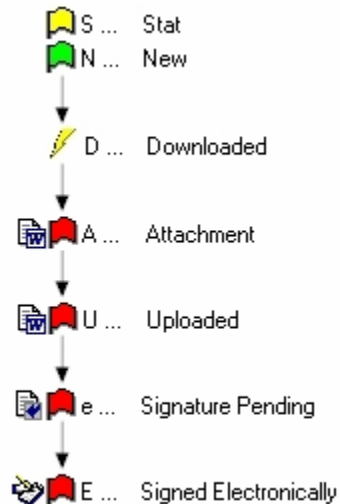
As a file is being downloaded by a transcriptionist, it is briefly marked as Locked (L) on the FTP server so that no other transcriptionist can access the same file at the same time. The status remains Locked until the file is completely transferred.

If a problem occurs during download and the file gets stuck in the Locked status, the transcriptionist can unlock the file. In the top pane of Doc-Shuttle Client, right-click on the Locked file and select **Change Status to New** from the menu that appears.

The file should unlock, and the transcriptionist can try to download the file again.

If someone downloads a file and then is unable to complete it, then the status of the uncompleted file should be changed back to New on the FTP server. To do this, the file should be deleted from the local computer (bottom pane of DocShuttle Client) and then the status needs to be reset to New.

First, to delete the file, it should be marked as Completed on the local drive by right-clicking on the file and selecting **Change Status To** from the popup menus that appears and then **Completed** from the sec-

Icon	Code	Status
🟡	S ...	Stat
🟢	N ...	New
↓		
⚡	D ...	Downloaded
↓		
📄🚩	A ...	Attachment
↓		
📄🚩	U ...	Uploaded
↓		
📄🚩	e ...	Signature Pending
↓		
✍️🚩	E ...	Signed Electronically

ond popup menu. Then the file can be deleted from the local drive by right-clicking on the file and selecting **Delete Selected Files** from the popup menu (a file that is not Completed status cannot be deleted).

Then, once the files have been deleted from the local drive, right-click the file on the FTP server in the top pane and select **Change Status to New** from the popup menu that appears.

Please note, it is possible to change the status and delete more than one file at a time. Just select multiple files to perform the same action.

The status of each file is synchronized with the files on the FTP server so that the administrator of the system can view the status of all files. This means that the administrator can manage the files for all transcriptionists from one location using DocShuttle Administrator.

Attaching External Documents

If a transcriptionist is using a word processor other than Microsoft Word or a player other than the Bytescribe WavPlayer, then Automatic Document Creation cannot be used. In that case, documents can be typed and saved and then attached to any voice file. Zip and PDF files may also be attached.

As a transcriptionist listens to voice files that have been downloaded, the transcription can be typed into any standard word processor such as Word or WordPerfect. These documents can be saved in any folder on the computer, such as the "My Documents" folder. Once a text document has been typed and saved to the computer, it is ready to be attached to the original voice file in the DocShuttle Client window.

To attach a document, right-click on the voice file in the bottom pane of DocShuttle Client and select the **Attach External Document** option from the popup menu that appears. Multiple documents can be added using the method.

The Complete status

Some companies may not need for transcriptionists to upload and return text documents through DocShuttle. In this case it would be enough for the voice files to be marked as Completed. In order to mark a voice file as Completed, right-click on the voice file and select **Change Status To** and then select **Completed**.

Please note: if a voice file already has a document attached, marking it Completed will delete the document.

Quality Assurance

Many companies require that a document be reviewed or edited for Quality Assurance (QA) purposes before a final copy is returned to the dictator. DocShuttle provides a method by which a transcriptionist may send files for QA review.

Both the initial transcriptionist and the editor/QA transcriptionist must be using DocShuttle Client. The QA review person should be granted QA privileges in their User Profile when Permissions are set in DocShuttle Administrator.
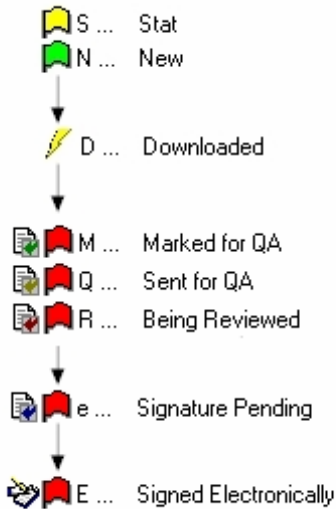
In order to begin the QA process, the file must be marked for QA before the document is uploaded back to the server. This can be done manually, on a file-by-file basis, or it can be done automatically for all files.

To mark an individual file for QA manually, right-click on the file and select **Mark Attachment for QA** from the popup menu that appears. The status of the file will then be changed to M.

To set up DocShuttle Client to automatically mark all files for QA, click on the **Tools** menu, select **Settings** and then go to the **Local** tab. There is a check box on that tab labeled **Mark attachments for QA review when attaching files**. Click to place a check mark in that box and then click the **OK** button. Now all files that get attached will be marked for QA.

When the transcriptionist uploads the file back to the FTP site, the status will be updated to Q for Sent for QA. The QA transcriptionist can then download the document using DocShuttle Client. He or she can open the document, make changes, and save the edited file on their own computer.

Once the file has been reviewed and saved, the QA transcriptionist uploads the document back to the server. So long as the document has the same name, it will overwrite the earlier, unedited document. Once the edited document is uploaded back to the server, the status is U for Uploaded, and the document can be downloaded by DocShuttle Dictator.

Note: It is important that the QA review person does not rename document file name during this process.
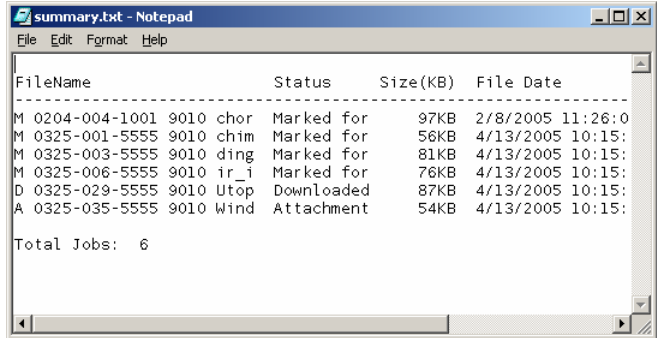
Reports in DocShuttle Client

There are two kinds of reports in DocShuttle: Quick Reports and Custom Reports. Both report types can be created either from within the main DocShuttle Client window or from within Document Manager.

Quick Reports

To create a Quick Report, highlight files you wish to appear in the report from the Local pane of DocShuttle window. Then click the **Quick Report** button. A report will appear in a new text file, allowing you to print, modify, or save the report.

Another method of creating a Quick Report is to right-click in the Local pane and select **Report of Local Files** from the popup menu. Similarly, to create a report of FTP files, right-click in the FTP pane and select **Report of FTP Files**.

Custom Reports

To create a Custom Report, click the **Custom Report** button. The **Custom Report** window will appear with a number of fields. Specify the criteria for the report and click the **Create** button.

If the documents downloaded by DocShuttle are Microsoft Word documents and Microsoft Word is installed on the computer, you may select the **Include MS Word Statistics** checkbox to include line count information in the report.

Using the DocShuttle Document Manager

To view all completed text documents, click on the **Tools** menu and select **Document Manager**. The Document Manager window will appear.

The Document Manager displays all attached documents for a particular voice file. This window enables functions such as printing, viewing, searching and creating reports.

DocShuttle Troubleshooting

Issue: I have a problem connecting to an FTP site

Check the DocShuttle Log (click **Tools > View Log**) to see if any information is given as to why the connection failed.

First, verify that your computer is connected to the Internet. Try opening an Internet browser to see if you can see web pages. DocShuttle will not work without an Internet connection.

Second, try turning on DocShuttle's Passive Mode setting. In the **Settings** window (click **Tools > Settings**) find the box labeled **Use Passive FTP Mode** and click to put a check mark in that box.

Third, verify that you can connect to an FTP site. Some firewalls and Internet Service Providers (ISP's) block FTP access. Open your web browser and enter "ftp://sample:sample@simpleftp.net" in the address bar, then hit enter. You should be able to see some files and folders in your web browser. If you cannot connect through FTP, you may need change settings in your firewall or contact your ISP.

Fourth, verify that your host address, user name and password are correct in the **Settings** window (click **Tools > Settings**). Check with your administrator to verify these settings. Your host address will usually be something like "mywebsite.com" or an IP address like "192.168.100.1".

Finally, verify that your FTP address is accessible. Try using another FTP program to connect to the same FTP site (Microsoft Internet Explorer, WS_FTP, CuteFTP, etc.)

Issue: I can connect to an FTP site, but I can't see any files

First, check the **Root Directory** setting in the **Settings** window (click **Tools > Settings**). This setting is usually blank. Only if the job type folders exist in a subfolder on the FTP site should there be a subfolder name in this field..

Second, make sure that the someone has created folders on the FTP site using DocShuttle Administrator. DocShuttle Client requires a particular folder structure on the FTP site. See DocShuttle Administrator Help files for more information.

Finally, make sure he files on the FTP site are of the correct type. DocShuttle will display files with .wav, .vox, .dss, .mp3, .msv, and .dvf extensions. Also, the files must have been uploaded by DocShuttle Dictator or Administrator in order for DocShuttle Client to see them.

Issue: I can connect to an FTP site, but I can't transfer files (upload or download)

First, if you have been able to upload or download previously, check to see that you are still connected to the FTP site. Some FTP sites will automatically disconnect you after so many minutes without any activity. Try disconnecting and reconnecting.

Second, if you have never been able to upload or download to this site, then you may not have proper permissions to the FTP site. Check with your FTP host to see what your FTP permissions are for the username and password you are using. In order to use DocShuttle, each user must have permissions to Read, Write, Overwrite, Delete, and Rename files on the FTP server.

Finally, some FTP servers do not allow files with spaces in the names to be uploaded. Check with your FTP administrator to see if you have a server that does not allow spaces in the filename. In some cases, Doc-Shuttle files can be created without any spaces in the file names.

Issue: When I download a voice file, it cannot be played or will not open.

First, the file may have been decrypted with the wrong decryption password. Check with the administrator to see if files being uploaded are encrypted and if so, double-check to see that you have the correct encryption password. If you did have an incorrect encryption password, you will need to re-download the file in order to decrypt it properly.

Second, check the file size of the downloaded file. Make sure that the size of the downloaded file exactly matches the size of the file on the FTP site. If it is not, it may not have downloaded correctly.

Finally, the file may have become corrupted on download. Try re-downloading the file and see if it can play.

The DocShuttle Software System allows transcription companies to easily manage workflow for unlimited remote dictators and transcriptionists. DocShuttle consists of three modules: Administrator, Client and Dictator. Each module has an easy-to-use interface specifically designed for the functions of that user. Whether you are uploading, downloading, managing workflow or organizing files, DocShuttle puts it all at your fingertips, easily and efficiently.

After installation, follow the instructions included with your DocShuttle to register your software.

If you have any problems installing the DocShuttle software, please look in the "Troubleshooting" section of this manual for help. Bytescribe Development Company also offers a line of affordable, reliable digital dictation systems. If you are interested in finding out about our other products, please visit our website.

Thank you for purchasing the DocShuttle by Bytescribe!

bytescribe
Dictation & Transcription
Solutions