Bytescribe, Inc.

WebShuttle Dictation and Transcription System

User's Manual
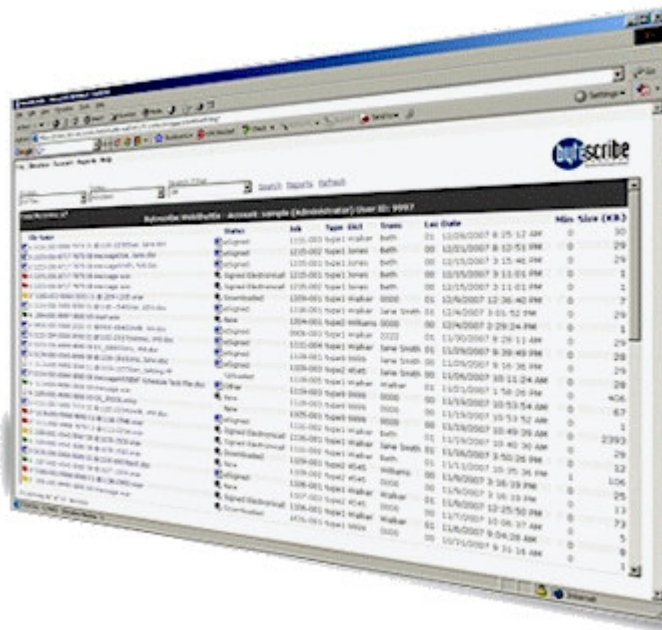
Software Version 2.0

Table of Contents

WebShuttle User's Manual

What is WebShuttle?

System Overview

WebShuttle is a web-based dictation and transcription platform. Dictators can dictate from any phone, handheld recorder or iPhone. Transcriptionists can access dictation and transcription files securely from anywhere. WebShuttle is designed to manage all aspects of transcription workflow for organizations of any size.

WebShuttle features include toll-free call-in dictation, secure web login, document management, electronic signature, quality assurance, detail billing reports, printing, and faxing. WebShuttle also seamlessly integrates with the popular DocShuttle desktop transcription software.

There are three basic user types in WebShuttle: transcriptionists, dictators and administrators. Each user type is given certain permissions for features in WebShuttle. A brief description of the basic user types is explained below.

Dictators

WebShuttle can be used by dictators who use a telephone or handheld recorders to record dictation. Dictation voice files are automatically routed to transcriptionists. Completed transcribed documents are uploaded back to WebShuttle. Dictators have access to these documents online through WebShuttle. Dictators can use WebShuttle to view completed documents, edit files, upload voice files, and electronically sign documents. These functions are dependent on the permissions granted to the user.

Transcriptionists

Transcriptionists use WebShuttle to download voice files and upload transcribed documents. Transcriptionists may type directly online into the WebShuttle word processor or they may choose to use DocShuttle desktop software to download voice files and transcribe documents. DocShuttle integrates with Microsoft Word on the transcriptionist's computer. The WebShuttle interface is also useful for searching for files and running reports.

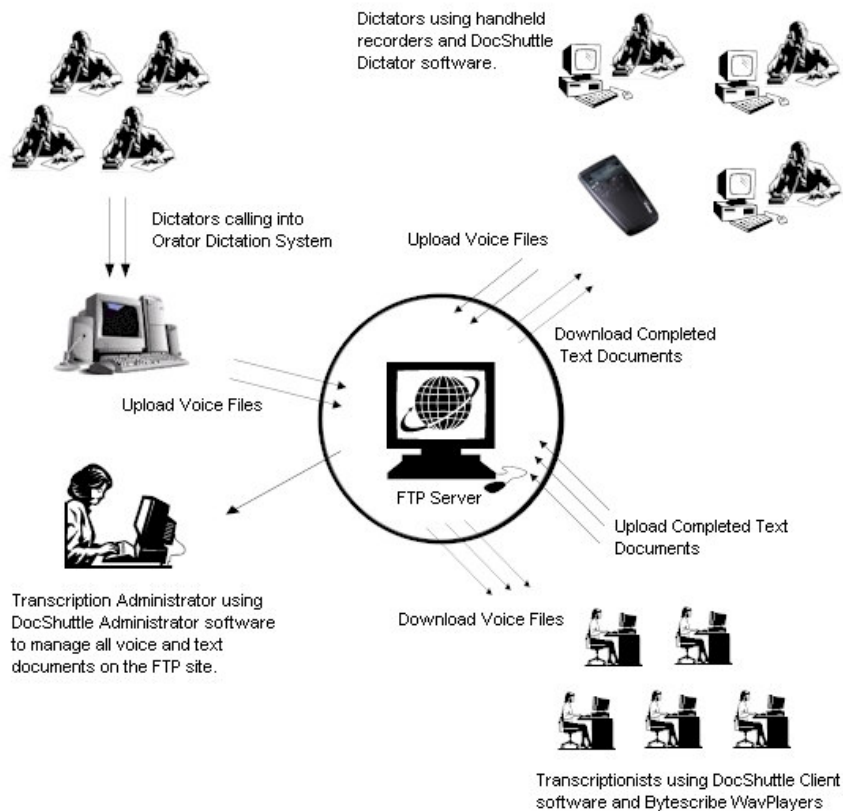### Administrators

Administrators can use WebShuttle to manage the transcription workflow, print documents and create billing reports. Administrators generally have access to viewing all dictation and transcription files. Administrators also have access to account information.

WebShuttle Workflow

Describing the WebShuttle Process

WebShuttle is designed to manage all aspects of transcription workflow for organizations of any size. The diagram below shows a typical workflow for an organization doing transcription. Dictators can dictate over telephone lines or use digital handheld recorders. All files are centrally stored on a web/FTP server. Transcriptionists can access files through the WebShuttle interface or by using DocShuttle desktop software.

Dictators using handheld recorders and DocShuttle Dictator software.

Dictators calling into Orator Dictation System

Upload Voice Files

Download Completed Text Documents

Upload Voice Files

FTP Server

Upload Completed Text Documents

Download Voice Files

Transcription Administrator using DocShuttle Administrator software to manage all voice and text documents on the FTP site.

Transcriptionists using DocShuttle Client software and Bytescribe WavPlayers

Status Flags

WebShuttle integrates with DocShuttle Transcription software and uses the same status flags for tracking files. Below is a diagram showing the different status flags as files move through the typical workflow.

S ... Stat
N ... New

D ... Downloaded

A ... Attachment ⟶ M ... Marked for QA

Q ... Sent for QA

U ... Uploaded ⟵ R ... Being Reviewed

e ... Signature Pending
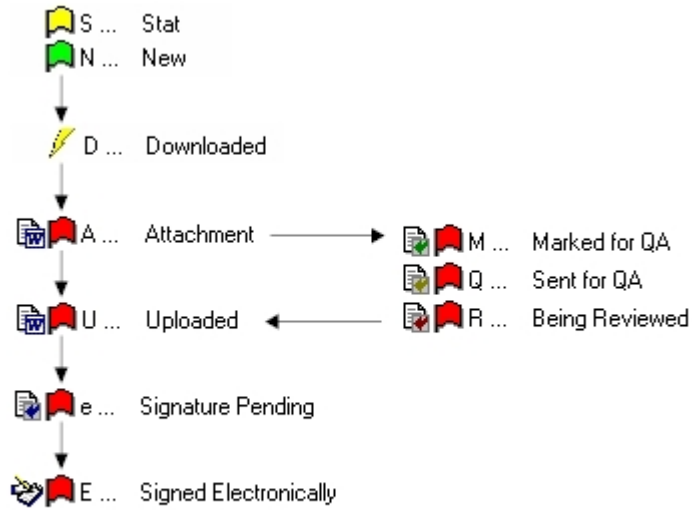
E ... Signed Electronically

Diagram showing workflow of files using DocShuttle software.

WebShuttle Home Page

Managing Files in WebShuttle

The WebShuttle home page is designed to display the most recent dictation and transcription files. The files that are displayed depend on the user type and permissions of the user. Voice files appear with colored flag icons next to each file. These flags indicate the status of the current job. Completed text documents generally have a Microsoft Word icon next to them.

There are 10 columns that appear in the main WebShuttle window. There a three filter options available at the top of the screen. Files can be filtered by file type, date or custom search criteria. Any file can be downloaded by clicking on the speaker or Word icon that appears to the right of the file name. Clicking on the file name link will display the File Details window discussed in the next chapter. Any column can be sorted by clicking the link in the column header.

Column Descriptions

The WebShuttle home page contains ten columns of information about each voice file. A description of each column is shown below.

1) **File Name**

   The voice files are named using the following convention:

   S MMDD-NNN DDDD TTTT LL .vox.

   The beginning letter of the voice file indicates the status (S) of the voice file. The table below shows the types of initial letters and the corresponding significance of the letter as pertaining to the file status.

Letter	Status
Voice Files	
N	New (ready to be transcribed)
S	Stat (priority dictation)
D	Downloaded (in use by a transcriptionist)
U	Uploaded with Attachment
C	Completed (no attachment)
E	E-Signed (attached has been electronically signed)
Documents	
U	Uploaded Document (transcribed)
S	Signed Document (electronically signed)

   The next segment of the file name (MMDD-NNN) is the job number. The job number is a combination of the date and sequence of the dictated file. Month and day MMDD are followed by dash (-) and then the sequence number. For example, a job number 1204-002 would indicate the second file dictated on December 04. The next segment (DDDD) of the file name is the four-digit code of the dictating author. The next segment (TTTT) indicates the four-digit code of the transcriptionist who typed the file. The following segment (LL) indicates a 2-digit location code. The last portion of the file (.vox) is the file extension.

2) **Status**

   This column denotes the current job status for each file. This concurs with the first letter of the file name. The possible job status categories are:

   New (ready to be transcribed)
   Stat (priority dictation)
   Downloaded (in use by a transcriptionist)
   Uploaded with Attachment
   Completed (no attachment)
   E-Signed (attached has been electronically signed)

3) **Job**

   This is a unique number by which any file may be found. The naming convention is as follows: The first four numbers represent the month and day (MMDD) followed by dash (-) and then the sequence number. For example, a job number 1204-002 would indicate the second file dictated on December 04.

4) **Job Type**

The next column is the job type folder. Job types are used to separate various types of dictation. When a dictator logs onto the system, he is prompted to select a job type – or his User Profile will specify a default job type. Jobs recorded by the dictator are marked with that particular job type. Transcriptionists may then work on dictation of a particular type.

5) **Dictator**

This column displays the dictator's name.

6) **Transcriptionist**

The name in this column indicates the person who is transcribing the file. Note that this column will only have an entry when a transcriptionist has started or finished transcribing the file.

7) **Location**

This column specifies the location code. Dictators uploading voice files from handheld recorders can specify different location codes.

8) **Date**

This column specifies the date and time the file was modified. The date is shown in the standard MM/DD/YY format. The time is displayed as hours:minutes:seconds followed by AM or PM.

9) **Minutes (Length)**

This column specifies the length of the voice file in minutes.

10) **Size**

This column specifies the amount of disk space used by the particular voice file.

File Details Window

Working with Files in WebShuttle

Clicking on any file in the WebShuttle homepage will display the File Details window shown below. Depending on the user's permissions, certain menu options will be available to the user in this window. The File Details window displays header information for the given file. Dictators will use this window to edit and electronically sign files. Transcriptionists will use this window to download voice files and type transcription documents.

Home Download File Email/Fax Edit as HTML

File Details   Edit   eSign File
                    Need Help?

File Name	type1\U 0430-025 9998 3333 01 Doe, John.doc
Account	University Hospital
Report Type	Clinic Note
Patient First Name	John
Patient Last Name	Doe
Med Rec No.	12345
Patient No.	54321
Dictating Physician	Kelly Wilson, M.D.
Attending Physician	
Visit Date	8/3/2008
Report Date	8/4/2008
Misc Field 1	
Misc Field 2	
Trans Initials	CB
Status	Uploaded
Date Created	8/4/2008 6:59:01 PM
Date Modified	8/12/2008 6:55:42 PM
Attachments	

< Prev   Next >

Chapter

4

WebShuttle Features

Using WebShuttle for Dictation and Transcription

WebShuttle is designed to have features that will allow any organization to manage dictation transcription files. The features discussed in this chapter are available through main menu on the WebShuttle homepage.

Uploading Voice Files

If dictators are using the WebShuttle call-in system to record dictation, voice files are automatically routed to the WebShuttle site. However, if dictators are using handheld recorders, files must be uploaded to the WebShuttle site. To automate the process of uploading files from handheld recorders, dictators may use DocShuttle Dictator desktop software. DocShuttle software automatically imports files from handheld recorders and uploads these files to the WebShuttle server.

Home **Tools** Reports Account Help Log Out
    Upload Files
    Search

If you're using the WebShuttle interface to upload voice files, select Tools | Upload Files from the WebShuttle menu. The user can then select files from the local hard drive and upload them into WebShuttle.

Return to Home

Upload Dictation File

File		Job Type (e.g. 1)
F:\My Documents\Smith, John.doc	Browse...	1
	Browse...	
	Browse...	
	Browse...	
	Browse...	
	Browse...	
	Browse...	
	Browse...	
		Upload File(s)

Search Function

WebShuttle provides a simple search feature that enables the user to search for files based on the search criteria. Use the search box at the top of the WebShuttle window to search for files using character strings found in the files names. For example, using the search term "smith" will find all files containing the term within the file name.

The WebShuttle search function also allows searching using wildcards (e.g. "N*.*"). This is similar to searching for files in Microsoft Windows. For example, searching for "N*" will display all files that start with the letter N and searching for "*.doc" will display all documents that have a .doc extension.

For advanced searches, you can use the Advanced Search link. The Advanced Search page allows the user to enter additional search criteria including job type, status, dictator ID, transcriptionist ID, location and date range.

Creating Reports

WebShuttle can create various types of custom reports. To create reports, select the Reports | Custom Reports menu option from WebShuttle. Enter the desired criteria into the Custom Reports window to run the report. The user can select the output format to be PDF, text file or Excel CSV format. Administrators can run billing reports based on line counts.

Dictation Call Log

For any WebShuttle accounts using the call-in dictation system, administrators can view the dictation call log to see a history of all calls made to the system. This is useful for seeing how many calls have been made or for determining if a particular dictation job has been recorded. To view the dictation call log, select Reports | Dictation Call Log from the WebShuttle menu.

Account Settings

Administrators can also view the account settings for the WebShuttle account. To view the account settings, select Account | Settings from the WebShuttle menu. The Account Settings window includes settings for purging files from your account. Document files and dictation files are purged based on this settings. By default, document files are purged after 120 days and dictation files are purged after 14 days. The Account Settings window also shows a list of all WebShuttle users for the account and the permissions granted for each user.

Home Tools Reports Account Help Log Out
- Settings
- Dictation Users

Return to Home

Account Information

Customer Name	John Doe	Email	jdoe@yahoo.com
Account Name	ws129	Encrypt Password	
Host Address	bytescribe.com	Purge Days (Dict)	14
FTP User Name	ws129	Purge Days (Docs)	120
FTP Password	*******	FTP Space Limit (MB)	100

Current FTP Usage: 20MB (52 files)

Account Users

Web User	Web Password	User ID	User Type	Access	Permissions	User Name
sample	sample	4545	Dictator			Dictator 1
sample	sample1	7878	Transcriptionist			Transcr 1
sample	xr1194	1194	Administrator		UDFA	David

Call-in Dictation Users

The administrator can also view a listing of all call-in users for the WebShuttle account. To view a listing of the call-in users, select Account | Dictation Users from the WebShuttle menu. This listing shows all users that have been set up to dictate using the WebShuttle call-in dictation system.

Home Tools Reports Account Help Log Out
- Settings
- Dictation Users

Using WebShuttle: Administrators

Managing WebShuttle

The primary goal of WebShuttle administrators is to manage dictation and transcription workflow. When an administrator logs into WebShuttle, the filters are set to display all files for the past seven days. Since administrators typically want to see both dictation and transcription files, the filter is set to display all files.

User Access

Each user that accesses the WebShuttle account is given a unique username and password. Each user is granted access to view certain files and folders based on the user name and password. WebShuttle uses "Job Type" folders to separate work based on dictator ID or work type. Users are granted access to certain job type folders. Users can also be restricted to only see files marked with the users 4-digit ID only. The Administrator can view a list of users for the account by clicking Account | Settings from the menu.

Home Tools Reports **Account** Help Log Out
            Settings
            Dictation Users

Account Users						
Web User	Web Password	User ID	User Type	Access	Permissions	User Name
sample	sample	4545	Dictator	1		Mike Jones, M.D.
sample	sample1	7878	Transcriptionist	1,3,5		Carol Smith
sample	xr1194	1194	Administrator		UDFA	David

The Access column above shows the Job Type folders to which the user has been given access. If the Access field is blank, the user can access all folders.

User access and permissions are granted by Bytescribe at the request of the administrator. The administrator cannot directly modify user access and permissions.

User Permissions

Each user is granted certain permissions based user name and password. The user permissions determine what features are available to the user. The Permissions column shown in the list below shows permission given to each user. If the Permissions field is blank, the user is given the default permissions for the User Type.

Account Users						
Web User	Web Password	User ID	User Type	Access	Permissions	User Name
sample	sample	4545	Dictator	1		Mike Jones, M.D.
sample	sample1	7878	Transcriptionist	1,3,5		Carol Smith
sample	xr1194	1194	Administrator		UDFA	David

The chart below shows the different permissions that can be assigned to a user.

> A=Attachment Upload (Documents)
> C=Complete File
> D=Delete File
> E=E-Sign
> F=Fax/Email
> I=IE Edit (MSWord documents in Internet Explorer)
> N=Create New Document (transcriptionists)
> R=Restricted (view files with own ID only)
> U=Upload Voice Files
> W=Word Edit (Edit in MSWord)

Administrator default permissions: DFU
Transcriptionist default permissions: ACN
Dictator default permissions: EUW

Quality Assurance

Any user that has been given permissions to edit documents in WebShuttle can make corrections online. However, there is a procedure for reviewing and correcting documents for Quality Assurance before files are marked as completed. Currently, this procedure is only available through DocShuttle Transcriptionist software. For more information, please review the DocShuttle Transcriptionist manual.

Archiving of Files

Files in WebShuttle will automatically be archived and removed from the WebShuttle account after a specified number of days. This period of time depends on the settings for the WebShuttle account. The default settings for a WebShuttle account is to archive voice files after 14 days and archive document files after 120 days. The longer files remain on the WebShuttle site, the more disk space will be required for the count.

Using WebShuttle: Dictators

Recording and Managing Files in WebShuttle

Dictators access WebShuttle to view and edit transcribe reports or upload dictation files from a handheld recorder. When a dictator logs into WebShuttle, the filter is set to view transcribed reports. Dictators can search, review, edit and electronically sign these documents.

Editing Documents

WebShuttle provides integration with Microsoft Word documents. If using Microsoft Word documents, editing can be done in several ways. One way is to edit documents online using the Edit as HTML function. This function will convert Microsoft Word documents into HTML and then save the documents back to Microsoft Word format after editing. Another way to edit Microsoft Word documents is to edit the documents in Microsoft Word and save them back to the server. This method requires the user to have Microsoft Word installed on the local PC and to enable running of ActiveX scripts. A third way to edit documents is to download the file, edit the file on the local PC and then re-upload the modified file. These three methods are described in more detail below.

Edit as HTML

When editing documents online, WebShuttle allows the user to use an online HTML editor to modify and save documents. The advantage of this method is that it does not require the user to have any type of word processor on the local PC. Also, this method does not require any special permissions to be set on the local PC. The only consideration is that when documents are modified from Microsoft Word format into HTML and then back to Microsoft Word format, some formatting may be lost. An image of the HTML editor is shown on the next page.
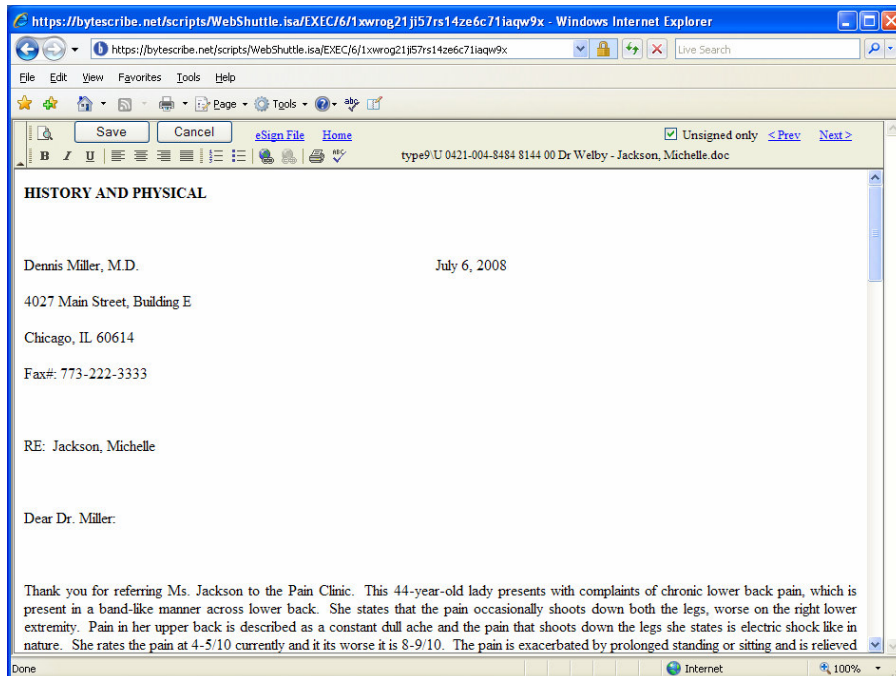
The WebShuttle HTML editor shown above can be used to edit and electronically signed documents online. The Save button in the toolbar will save changes made to the document and return the user back to the File Details window. The "eSign File" link will save changes, add a signature line and protect the document from further changes. You can use the Next and Prev links to navigate to other reports without having to leave the HTML editor. If the "Unsigned Only" checkbox is checked, the Next and Prev links will navigate to documents that have not been eSigned.

Edit using Microsoft Word

Editing a Microsoft Word document online requires you to use Microsoft Internet Explorer and have Microsoft Word installed on your computer. The user must also set the permissions for Internet Explorer to allow an ActiveX control to run. To do this, select Tools | Internet Options from the Internet Explorer menu. Then select the Security tab and click the Trusted Sites icon. Click the Sites button and add "https://*.bytescribe.net" to the list of trusted sites. Then click the "Custom Level" button for trusted sites. Then enable the option for "Initialize and script ActiveX controls not marked as safe".

To edit a file using Microsoft Word, click the Edit button on the File Details window shown below. If the computer has been configured correctly, the document will appear in Microsoft Word. Any changes to the document will be saved directly to the server.

Edit Documents Off-line

If the two methods described above cannot be used for some reason, documents can be edited off-line. With this method, documents are downloaded to the local hard drive, edited and then re-uploaded back to the server. This method would need to be used if the documents are not editable in Microsoft Word. Special permissions would need to be granted to the user in order to use this method.

The procedure for editing documents offline is to first click the Download File menu option in the File Details window. The file will be downloaded and saved to the hard drive of the user's PC. The file can then be edited. After the file is edited, select the Browse button and select the edited file. Then click the eSign link. The document will be uploaded back to the web server and electronically signed.

Electronic Signature

Microsoft Word documents can be reviewed and electronically signed in WebShuttle. There are links to eSign a document both on the File Details window and in the Edit As HTML window. Clicking the link to eSign a document will insert an electronic signature line at the bottom of the document with the dictators name, date and time. The document will also be protected using Microsoft Word's protect document feature.

Chapter

7

Using WebShuttle: Transcriptionists

Transcribing in WebShuttle

There are several methods for transcribing files in WebShuttle. These include transcribing online into WebShuttle, using DocShuttle transcription software or uploading external documents. These methods are explained in more detail in this chapter.

Transcribing Online into WebShuttle

WebShuttle has a fully functional online word processor that is compatible with Microsoft Word. Transcriptionists can type directly into the word processor and the documents are saved as Microsoft .doc files. Below is a screen shot of the WebShuttle word processor.
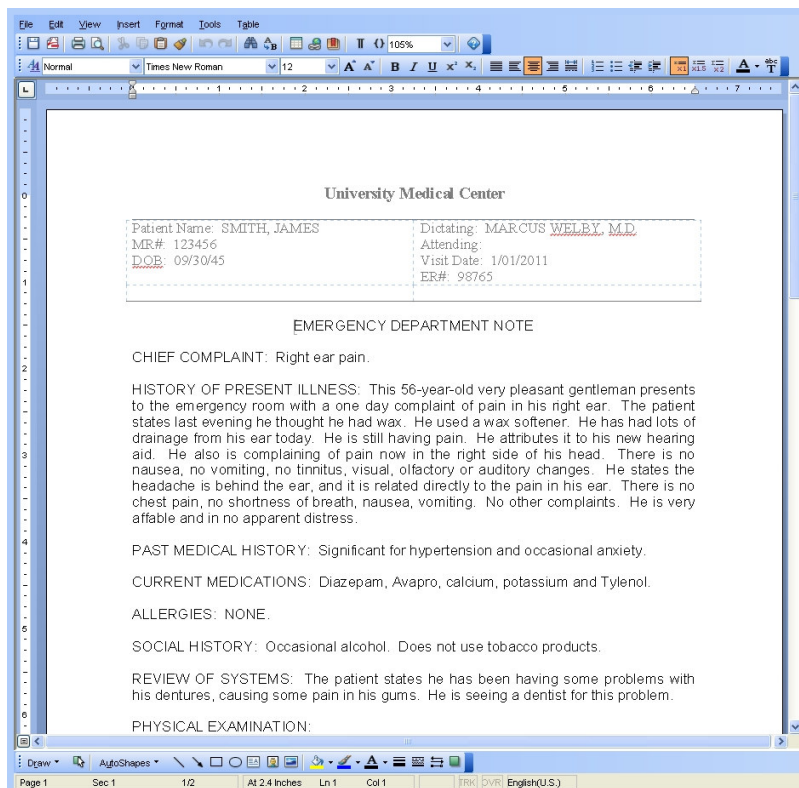
The process of typing online is described below. From the WebShuttle home page, the transcriptionist will click the speaker icon to the right of the audio file name. This will load the audio file into the default player so that the transcriptionist can control the audio with a foot pedal.
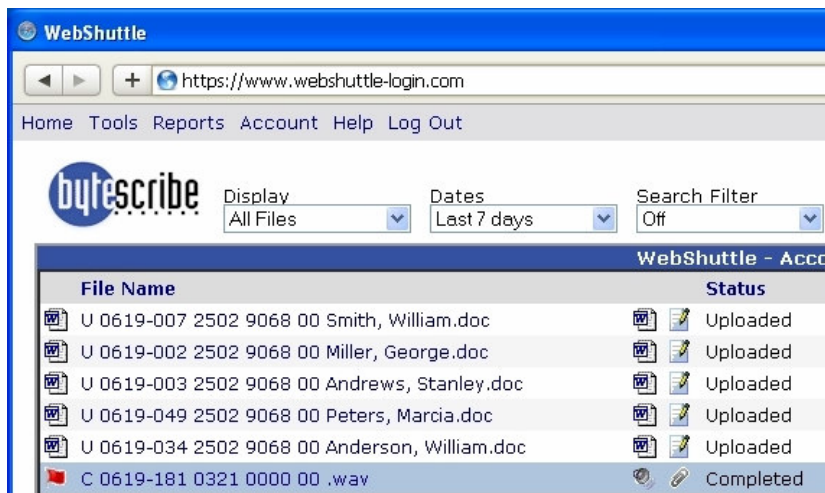
Next the transcriptionist will click on the file name. This will open the File Details window shown below. The transcriptionist will complete the fields shown and then click the Create New Document button. When completing the fields, saved information will automatically appear when typing.
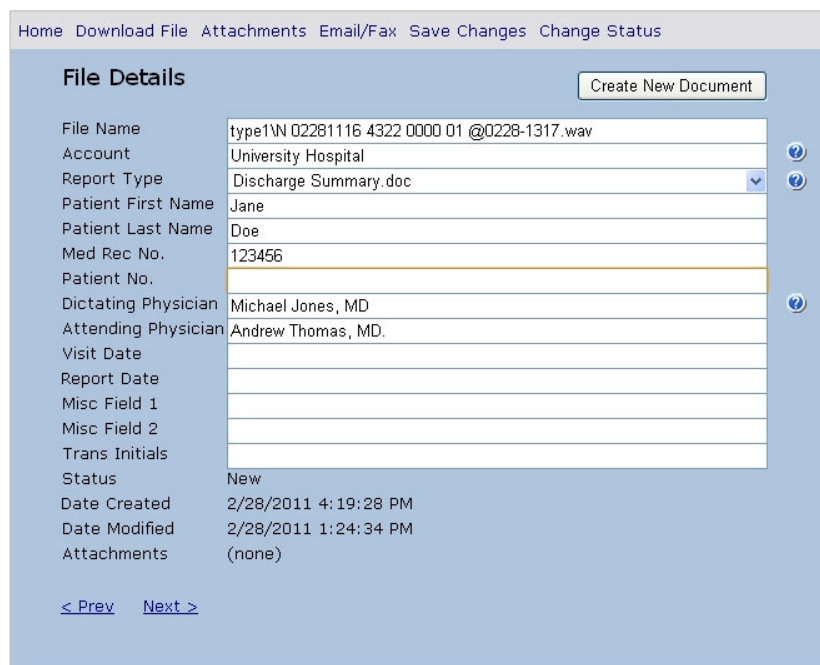

The Report Type field is a dropdown list of stored templates. Templates can be created and managed through the DocShuttle Transcripionist Plug-in. The Plug-in can be downloaded from the WebShuttle menu.

Transcribing using DocShuttle

DocShuttle is transcription software that can be installed on a transcriptionist's PC. DocShuttle software is used to download voice files from WebShuttle, transcribe them offline and then upload
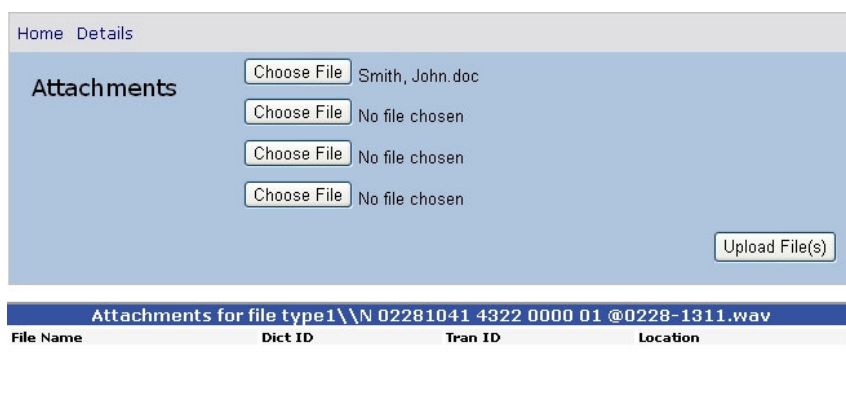
completed documents back into WebShuttle. DocShuttle software integrates with Microsoft Word and stores Word templates. DocShuttle is capable of uploading and downloading multiple documents at once. DocShuttle Plug-in software can be downloaded from the WebShuttle menu or a separate license can be purchased from the Bytescribe store.
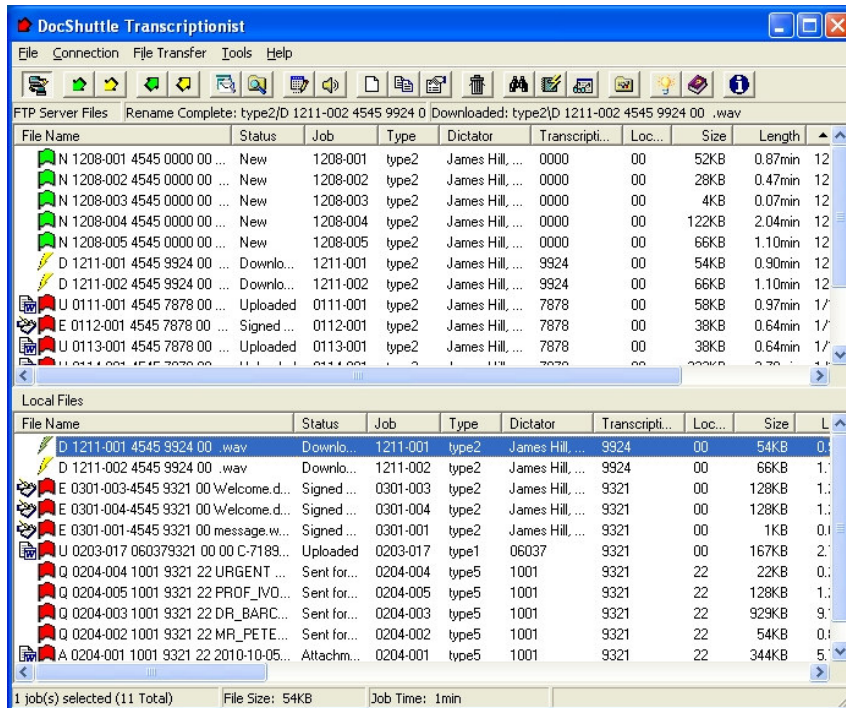
Uploading External Documents to WebShuttle

Another method of transcribing documents is to simply type the documents in a word processor such as Microsoft Word. Completed documents can then be manually uploaded into WebShuttle using the WebShuttle interface. This method does not require purchasing any software. However, only one document can be uploaded at the time. This method is not as efficient for the transcriptionist as the method described above.

To upload an external document, the transcriptionist will click the paper clip icon next to the audio file name on the WebShuttle home page (shown on the previous page). The Attachments window below will appear. The transcriptionist will click the Choose File button to upload the document.

Quality Assurance

Any user that has been given permissions to edit documents in WebShuttle can make corrections online. However, there is a procedure for reviewing and correcting documents for Quality Assurance before files are marked as completed. Currently, this procedure is only available through DocShuttle Transcriptionist software. For more information, please review the DocShuttle Transcriptionist manual.