

HELP

Office Manager is a user friendly and intuitive interface, requiring the minimum amount of training and support. However, these pages provide a comprehensive user guide to the system. Always click on the **Home** link to take you back to the home page.

Departments and department logins

Each department (or section or location) of your company is set up separately and each department can have one or multiple logins, all of whom can log onto the system and upload work. When you first set up a department you enter the departmental and first login details on the same screen (see below). You can set up additional logins for that particular department (i.e. where more than one person will log on to upload work), via the Logins link under Manage Departments.

Setting up a new department

- In **Administration Tasks** on the left of the screen, click on **Manage Departments**
- Click on **Actions** and select **New department**– a new window will appear on your screen
- Complete the department's contact details
- **Primary administrator** – if an administrator within your company is going to be specifically responsible for this department, select their name here (see below for details of how to set up transcribers/administrators)
- **Login name** – this is the name of the department's primary login which will be displayed when they log in
- **Email address** – specific to this particular login
- **Password** – specific to this particular login
- **Notification method** – logins will be notified of when their work is ready for download – specify here whether you want them to be notified by email, text message (SMS) or both
- **Save and Close**
NB – a department login is automatically created for the department once you save their new department record – you do not need to set up a login for them separately

Setting up a additional department logins

- In **Administration Tasks** on the left of the screen, under **Manage Departments**, click on **Logins**

- Click on the down arrow to the right of the **Department Filter** and select the department for whom you wish to enter a login
- Click on **Actions** and **New department login** – a new window will appear on your screen
- Complete the login's contact details including the email address and password they will use to log onto the system
- **Notification method** – logins will be notified of when their work is ready for download – specify here whether you want them to be notified by email, text message or both
- **Department administrator** – tick this box if you want this login to be able to view all jobs uploaded by all the department's logins (not just his or her own); the initial login set up when the department is first set up will automatically be made a department administrator – if you wish to change this, click on the **Logins** link under **Manage departments** and follow the **Edit department login** steps below

Editing an existing department's details

- Click on **Manage Departments** under **Administration** Tasks on the left of the screen
- Click on the **Edit** button against the department whose details you wish to edit – a new window will appear on your screen – you can edit any details and click on **Save** to save them

Editing an existing department login's details

- Under **Manage Departments** on the left of the screen, click on **Logins**
- Click on the down arrow to the right of the **Filter** and select the department for whom you wish to edit a login
- Click on the **Edit** button against the login whose details you wish to edit – a new window will appear on your screen – you can edit any details and click on **Save** to save them

Documents

*You can upload any number of documents to the system. These may be lists, examples, instructions etc. There are two types of document – templates and department-specific documents: if the document you are setting up is going to be used as a template, **please note it must not be department-specific***

Setting up a new document:

- In **Administration Tasks** on the left of the screen, click on **Manage Documents**
- Click on **Actions** and select **New document** – a new window will appear on your screen
- Click on the down arrow to the right of the department drop down box – you will be given the option to select an existing department or a **Template**. (Templates are letters, faxes, memos, reports etc that your transcribers will use to produce each job; whenever a job is uploaded to the system the author must identify which template the transcriber must use. Department specific documents may be examples, precedents, instructions that are only applicable to that department)
- Having selected a specific department or a template, you should name the document, enter a description, tick if it is to be available to transcribers, and browse your PC for the document
- **Save and Close**

Editing an existing document

- In **Administration Tasks** on the left of the screen, click on **Manage Documents**
- Click on the down arrow to the right of the **Department Filter** and select **All departments** if you wish to edit a template, or select a specific department if you wish to edit a document relating to them
- Click on the **Edit** button against the document whose details you wish to edit – a new window will appear on your screen – you can edit any details on the screen and click on **Save** to save them; alternatively you can browse to upload a new or amended document from your PC

Templates

*Every job an author (login) submits is based on a template. The author selects the appropriate template at the same time as uploading the soundfile, and that template is then available for the transcriber when he or she commences the job. **Please note: you must set up templates before you can assign them to departments, and departments must be assigned at least one template before they can upload their first job***

Setting up a template

- In **Administration Tasks** on the left of the screen, click on **Manage Templates**
- Click on **Actions** and select **New template** – a new window will appear on your screen

- Name the work type – eg “ letter” – and give a brief description if required
- Browse the list of documents which have been set up (see above) to select the appropriate document for this template
- **Save and Close**

Assigning templates to departments

- In **Administration Tasks** on the left of the screen, under **Manage Departments**, click on **Templates**
- Click on the down arrow to the right of the **Department Filter** and select the department for whom you wish to assign a template
- Click on **Actions** and select **New department template** – a new window will appear on your screen
- Click on the down arrow next to Template and select the template which you wish to assign to this department
- **Save and Close**

Transcribers

Entering your transcribers' details onto the system allows them to log on to the system and to access any work you may assign to them, as well as upload completed work.

*You can also assign specific rights to transcribers: if a transcriber is a **Transcriber Administrator** they are able to see all new jobs that are uploaded to the system by department logins, to assign (to other transcribers), review and complete them; if a transcriber is a **Company Administrator**, as well as assigning and reviewing work, they can also enter and edit department and login details, other transcribers, documents, templates etc*

Setting up a transcriber

- In **Administration Tasks** on the left of the screen, click on **Manage Transcribers**
- Click on **Actions** and select **New Transcriber** – a new window will appear on your screen
- Complete the transcriber's contact details, including the password they will use to log in to your site
- Against **Availability** you can enter details of when a transcriber is available for work
- Against **Notification Method** you can specify whether they are to be notified of new jobs by email, text message (SMS) or both

- Tick the **Transcriber Administrator** box if you require a particular transcriber to be able to view/assign/review all jobs
- Tick the **Company Administrator** box if you require a particular transcriber to be able to create and edit departments, documents etc
- **Save and Close**

Editing an existing transcriber's details

- In **Administration Tasks** on the left of the screen, click on **Manage Transcribers**
- Click on the **Edit** button next to the Transcriber whose details you wish to amend – the transcriber details window will open on your screen
- Amend details as required
- **Save and Close**

Manage Jobs

Accessing your work

- Select **Manage Jobs** under **Common actions** – a list of all jobs will appear on screen, split into **New, Assigned, In Progress, For Review** and **Approved/Returned** tabs

Setting up a new job for a departments

Authors (logins) will normally upload their own jobs; however there is a feature whereby you, as Administrator can upload jobs for them

- In **Common Actions** on the left of the screen, click on **New Job** – a new window will open on your screen
- Select the **Department**, the **login** and the **Template** from the drop down boxes
- Enter a **document name** and a date and time required
- Click on **browse** to locate the soundfile associated with the job
- In **Job/Document Notes** add any relevant details about the job
- **Save and Close**

Assigning a job to a transcriber

- In **Common Actions** on the left of the screen, click on **Manage Jobs**

- In **New Jobs**, click on the link in the **Job Details** column – a new screen will open displaying the job details. From here you can open the file uploaded by the department login (or by you on the login's behalf) and save it to your desktop if required
- Once you have checked the details and downloaded the file, close that window
- Click on the icon in the **Assign job** column – a new window will open on your screen
- Enter the number of minutes
- Select a transcriber's name from the **Transcriber** drop down box
- Enter the **date** and **time** by which you require the job to be ready for review and the **date** and **time** you estimate the job will be completed
- In **Job / Document** notes add any instructions or details which may be of assistance to the transcriber in completing the job
- **Save and Close**

*As an administrator you can assign jobs to yourself as well as to other transcribers. To view jobs that you have assigned to yourself (or that other Transcriber Administrators may have assigned to you) switch to **Transcriber View** under **Common Actions** then click on **My Jobs** under **Common Actions**. You can download any associated files by clicking on link in the **Job Details** column or clicking on the icon in the **Download File** column*

Putting a job in progress (as a transcriber)

- From the **My Jobs** screen, click on the icon in the **Download file** column and a new window will open on your screen showing the job details
- Click on the **Download link** to open or save the soundfile ready for transcribing
- **Close**
- Click on the icon in the **Start Job** column
- Tick the **Job has started** box and adjust the started **date** and **time** if necessary
- Click on the **template** link to open or save the template ready for typing
- **Save and Close**

Completing a job (as a transcriber)

- Click on the icon in the **Complete job** column and a new window will open on your screen
- Tick the **Job completed** box
- Adjust the **job units** if necessary to ensure they are accurate

- Click on **Browse** and browse for the file containing the completed job
- In **Job / Document Notes** enter any information which may assist the Administrator at reviewing stage
- Click on **Save** and **Close**

Reviewing a job

Jobs may be reviewed by the administrator before being returned to the author (login); or this stage may be used for the “printing” function – jobs ready for review can be printed and completed. To review a job:

- In Administrator view, click on **Manage Jobs** and select the **Jobs for Review** tab
- Click on the link in the **Job Details** column – a new screen will open displaying the job details. From here you can open the file uploaded by the transcriber and save it to your desktop ready to review (NB - you can also open it by clicking on the icon under **Review File**) – a new window will appear which will contain the job details, including any additional comments/notes the transcriber has added to assist the person reviewing the file
- Once you have checked the details and downloaded the file, close that window
- Having reviewed and saved the reviewed job, click on the icon in the **Complete review** column – a new window will open on your screen
- Tick the **Review successful** box
- Adjust the total the number of minutes if necessary
- If you have made any amendments to the original file uploaded by the transcriber, browse for the amended version; if you had not made any changes you do not need to browse for another file – the system retains the original one
- Add any additional **Job / Document notes** that you may need to refer to in the future
- **Save** and **Close**

Returning an approved job

Once you have completed the review stage, the job will be available for the author (login) to download

- In **Approved/Returned jobs**, click on the icon in the **Notify login** column – a new window will appear on your screen

- Add any additional information you want to the message screen and press **Send** - a notification email and/or SMS will be sent to the login
- When a department login has downloaded a completed job, the date and time downloaded appears in the **Downloaded** column of the **Approved/Returned Jobs** screen

*NB – jobs remain in the Approved/Returned Jobs screen for 7 days following download by the department login; thereafter they can still be accessed via the **View All Jobs** link under **Common Actions***

Reports

The following reports are available:

- Outstanding job list – all outstanding jobs on the system, showing date required and status – can be filtered by department
- Completed job list – a record of all completed jobs
- Department list – a record of all departments set up on the system to date
- Transcriber list – a record of all transcribers set up on the system
- Transcriber activity – showing current activity and availability
- Transcriber history – a historical record of work completed by transcribers