

NCH Software Express Delegate

This user guide has been created for use with
Express Delegate Version 4.xx

Technical Support

If you have difficulties using Express Delegate please read the applicable topic before requesting support. If your problem is not covered in this user guide please view the up-to-date Express Delegate Online Technical Support at www.nch.com.au/delegate/support.html.

If that does not solve your problem, you can contact us using the technical support contacts listed on that page.

Software Suggestions

If you have any suggestions for improvements to Express Delegate, or suggestions for other related software that you might need, please post it on our Suggestions page at www.nch.com.au/suggestions/index.html

Many of our software projects have been undertaken after suggestions from users like you. You get a free upgrade if we follow your suggestion.

Express Delegate

Contents

Overview	3
System Requirements	4
Installing, Upgrading, and Uninstalling	5
Getting Started	6
Licenses and the Trial Period	7
Client Programs	8
Software License Terms	9

Administration

Administration: Database	10
Administration: Security	11

Concepts

Concepts: Dictations	12
Concepts: Rules	15
Concepts: Typing Pools	16
Concepts: Users	17
Concepts: Auto-Import	18
Concepts: Maintenance Mode	21

Main Window

Main Window: Reference	22
Main Window: Menu Reference	23

Options

Options: Overview	25
Options: Startup	26
Options: Administration	27
Options: Web Access	28
Options: Database	29
Options: Email	30

Options: File Types.....	31
--------------------------	----

Web Control Panel

Web Control Panel: Overview.....	32
Web Control Panel: About.....	33
Web Control Panel: Logon.....	34
Web Control Panel: Dictations.....	35
Web Control Panel: Rules.....	37
Web Control Panel: Typing Pools.....	38
Web Control Panel: Users.....	39
Web Control Panel: Auto-Import.....	40
Web Control Panel: Options.....	41
Web Control Panel: Log.....	43

Screen References

Options ~ Web Access.....	44
---------------------------	----

Other Links

Options ~ Web Routing - URL <http://www.nch.com.au/kb/10233.html>

Overview

Express Delegate: Dictation Workflow Management

Express Delegate manages dictation files and tasks, assigning transcription tasks to the most appropriate typists, and tracking the status of all tasks.

The Express Delegate server is installed on one computer and the data is made accessible to users on other computers over a local area network (LAN) or the internet using either the Web Control Panel

or one of the client programs.

Benefits of Express Delegate for managers:

- Group typists into one or more typing pools.
- Create automated rules for assigning typing tasks to free typists based on configurable criteria.
- See overviews of who is working on what and how much work is pending.
- Access management tools remotely over LAN or internet.
- Store all dictation files on a central server, hidden from the users, avoiding the risk of files being accidentally deleted from a file share, FTP site, or email inbox.
- Can be configured to only allow clients to connect over secure connections.

Benefits of Express Delegate for speakers and typists:

- Work smarter: More urgent dictations are assigned to a typist first. (Urgency is calculated using priorities, deadlines, and the relative ages of dictations.)
- Less confusion: Dictations that aren't assigned to you are not visible to you.
- Tools you know: Full integration with NCH Software dictation and transcription software.

System Requirements

Express Delegate is server software. It only needs to be installed on one computer (the "server"), which should be switched on 24 / 7. Clients then access the server via the network, using either a web browser or a [client program](#).

Server requirements

- Operating System

Windows XP, 2003, Vista, 2008, or 7.

- Local area network (LAN) and / or internet connection

Client requirements

- Operating System

Please refer to "client program", below.

- Local area network (LAN) and / or internet connection

- One or more of:

- A JavaScript-enabled web browser

Microsoft Internet Explorer 7, and Mozilla Firefox 3 are known to work.

- A [client program](#)

Installing, Upgrading, and Uninstalling

Installing

1. If Express Delegate v 3.00 or earlier is already installed

Exit any running instances of Express Delegate. When asked if it should continue running in the background, click "No". Now uninstall the old version of Express Delegate.

2. Install Express Delegate

Download the installer from the Express Delegate [home page](#). Install and run the program.

The Express Delegate server only needs to be installed on one computer. Users on other computers will either access the [Web Control Panel](#) from a web browser, or use one of the [client programs](#)

3. Getting Started

When installation has finished, the "Getting Started" wizard will run. Complete the wizard to:

- Learn about [Licenses and the Trial Period](#), or purchase and register a license.
- Enable and configure the [administrator account](#).
- Configure [email settings](#).

Upgrading

When upgrading to a new version of Express Delegate, you can either uninstall the existing version first, or install the new version over the existing version.

Uninstalling

When uninstalling:

- Application settings, including license details, will always be removed.
- The uninstaller will ask if you want to keep or delete data files. Data files include the database, log files, SSL certificate, session data, etc.

Getting Started

1. Logon as the administrator

From the [Web Control Panel](#) Logon page, type "admin" in the Email field, and the administrator account password that was configured in [Options: Administration](#).

2. Create user accounts

You must create a [user](#) account for each person who needs access to the Express Delegate server. Using the [Web Control Panel](#), click on the "Users" tab, then the "Create new" button. For more information, click the "Help" link in the top-right corner of the page.

3. Create typing pools

You should create one or more [typing pools](#) if you want Express Delegate to automatically assign dictations to the first available typist in a group of typists. Using the [Web Control Panel](#), click on the "Typing Pools" tab, then the "Create new" button. For more information, click the "Help" link in the top-right corner of the page.

4. Create rules

You must create one or more [rules](#) if you want Express Delegate to automatically assign dictations to typing pools or individual typists. Using the [Web Control Panel](#), click on the "Rules" tab, then the "Create new" button. For more information, click the "Help" link in the top-right corner of the page.

5. Create auto-import sources (Only available in Express Delegate Plus)

Create one or more [auto-import](#) sources if you want Express Delegate Plus to automatically import recordings from files found in local folders or FTP server directories. Using the [Web Control Panel](#), click on the "Auto-Import" tab, then the "Create new" button. For more information, click the "Help" link in the top-right corner of the page.

6. Logoff the administrator

Using the [Web Control Panel](#), click the "Logoff" link in the top-right corner of the page.

7. Disable the administrator account

To prevent misuse, the administrator account can be disabled when not in use. Please refer to [Options: Administration](#) for instructions on how to disable the administrator account.

8. Configure client programs

The Express Delegate server can now be accessed by [client programs](#) on other computers. Please refer to the documentation of the relevant program(s) for instructions on how to configure the Express Delegate sever address and user logon details.

Licenses and the Trial Period

Feature Comparison Table

Feature	Express Delegate	Express Delegate Plus Business	Express Delegate Plus Enterprise
License required	No	Yes	Yes
Cost	Free	Paid	Paid
Maximum number of <u>user</u> accounts	5	30	Unlimited
<u>Automatically import recordings</u>	No	Yes	Yes
<u>Report emails</u>	No	Yes	Yes
<u>Notification emails</u>	No	Yes	Yes

Trial Period

The software will operate as a trial version for a limited time after it is first installed. During this trial period, all features of Express Delegate Plus Enterprise are available. When the trial period expires, the software will continue to work indefinitely as Express Delegate, with reduced functionality.

To continue using the advanced features of Express Delegate Plus after the trial period, you must purchase a license online from the secure [purchase page](#).

For activation and registration instructions, please refer to [Technical Support - Purchasing and Registering Licenses](#)

Client Programs

The following NCH Software programs can be used as Express Delegate clients, communicating directly with the Express Delegate server:

For speakers:

Express Dictate: Professional Dictation Recorder

<http://www.nch.com.au/express/index.html>

Version 5.04 or greater is required.

Version 5.18 or greater is recommended.

MSRS: Conference and Court Recording System

<http://www.nch.com.au/msrs/index.html>

Version 4.06 or greater is required.

Version 4.07 or greater is recommended.

Web Dictate: Internet Dictation Software

<http://www.nch.com.au/webdictate/index.html>

Version 2.01 or greater is required.

Dial Dictate: Phone Dictation System

<http://www.nch.com.au/dialdictate/index.html>

Version 4.23 or greater is required.

For typists:

Express Scribe: Transcription Playback Software

<http://www.nch.com.au/scribe/index.html>

Version 4.27 or greater is required.

Version 5.04 or greater is recommended.

Third-party dictation applications can be integrated via the Express Delegate Plus automatic importing feature. Please refer to [Concepts: Auto-Import](#) for more information.

Software License Terms

1. The copyrights in this software and any visual or audio work distributed with the software belong to NCH Software and others listed in the about box. All rights are reserved. Installation of this software and any software bundled with or installed-on-demand from this software is licensed only in accordance with these terms.
2. By installing, using or distributing this software you, on your own behalf and on behalf of your employer or principal, agree to be bound by these terms. If you do not agree to any of these terms, you may not use, copy, transmit, distribute, nor install this software - return it to the place of purchase within 14 days to receive a full refund.
3. This software, and all accompanying files, data and materials, are distributed "as is" and with no warranties of any kind, whether express or implied except as required by law. If you intend to rely on this software for critical purposes you must test it fully prior to using it, install redundant systems and assume any risk.
4. We will not be liable for any loss arising out of the use of this software including, but not limited to, any special, incidental or consequential loss. Your entire remedy against us for all claims is limited to receiving a full refund for the amount you paid for the software.
5. You may not use this software in any circumstances where there is any risk that failure of this software might result in a physical injury or loss of life. You agree to indemnify us from any claims relating to such unauthorized use.
6. You may copy or distribute the installation file of this software in its complete unaltered form but you may not, under any circumstances, distribute any software registration code for any of our programs without written permission. In the event that you do distribute a software registration code, you will be liable to pay the full purchase price for each location where the unauthorized use occurs.
7. Use of statistics collected by the software is subject to the NCH Software Privacy Statement which allows automatic anonymized collection of usage statistics in limited circumstances.
8. The contract arising out of this agreement is governed by the laws and courts of the Australian Capital Territory.

Administration - Administration: Database

Database back-up

The database stores all recordings, transcripts, user account details, rules, typing pool details, etc., therefore the active database file should be backed up regularly.

The location of the database file will normally be:

- For Windows XP: C:\Documents and Settings\All Users\Application Data\NCH Software\Delegate\database.db
- For Windows Vista / 7: C:\ProgramData\NCH Software\Delegate\database.db

If / when a backed up database is restored, and the latest back up was taken before the creation of the most recent dictations, please be aware that client programs such as Express Scribe may assume that those dictations have been deleted from the server.

Database schema versions

The database schema version is used to track changes to the format of the data in the database. Some features of Express Delegate require a minimum database schema version to function.

When upgrading or downgrading Express Delegate, or when restoring a database from a back-up, one of the following warning messages may appear in the log:

- Database uses a superseded schema version This means that the database was created with an earlier version of Express Delegate and that the schema version used in the current version of Express Delegate is higher. Express Delegate is backwards compatible with databases created in earlier versions and will continue to operate, however there may be new features that require the latest schema version and will therefore not be available. See Options: Database for details about updating the schema version.
- Database uses a potentially incompatible schema version This means that the database was created with a later version of Express Delegate and that the schema version used in the current version of Express Delegate is lower. Express Delegate is not guaranteed to be forwards compatible with databases created in later versions, and may operate incorrectly, possibly causing data corruption.

Uninstalling or upgrading Express Delegate

See Installing, Upgrading and Uninstalling for information about keeping or deleting the database when uninstalling or upgrading.

Administration - Administration: Security

Follow these recommendations to keep your data secure: Disable the non-secure server port
Transmissions to and from the secure server port are protected by encryption. Disabling the non-secure server port will force all clients to connect to the secure port.

See [Options: Web Access](#) for details.

Secure the server machine

A user with physical or remote access to the machine that Express Delegate is installed on can potentially access any dictation or user data, or modify server options or user accounts in a way that could expose data to non-approved users.

Take care to:

- Configure operating system user account and group privileges
- Configure access permissions on the Express Delegate program data folder
- Configure Express Delegate [service settings](#)
- Limit physical access to the server machine

Disable the administrator account when not needed

Ideally, the administrator account should only be used to create, modify, or delete other user accounts. When not performing these tasks, consider disabling this account to prevent unwanted access to all the dictations in the database.

See [Options: Administration](#) for details.

Choose user roles carefully

The manager role gives a user access to all dictations in the database. Attempt to give this role to as few users as possible.

See [Concepts: Users](#) for details.

Check the event log for suspicious activity

The event log keeps a record of what actions have been performed on the dictations and which users performed them. Use this information to check for suspicious activity.

See [Web Control Panel: Event Log](#) for details.

Concepts - Concepts: Dictations

The properties of a dictation are:

Speaker

The user who uploaded the dictation.

Status

One of the following:

- Unassigned

The recording has been uploaded to the server, but the task of transcribing it has not yet been assigned to a typist.

- Assigned

The task of transcribing the recording has been assigned to a typist, but the typist has not yet started typing.

- Transcribing

The typist is typing the transcript.

- Finished

The typist has finished typing and has uploaded the transcript to the server.

Priority

Low, Normal, or High.

Deadline (Optional)

The transcript must be uploaded by this date / time.

Typing pool (Optional)

The typing pool that this dictation has been assigned to.

Typist (Optional)

The typist that this dictation has been assigned to.

Recording

An audio file of a person speaking.

File name

The audio file name.

Uploaded

The date / time when the recording was uploaded.

Size

The size of the audio file (in bytes).

Duration

The duration of the audio file (hours:minutes:seconds.milliseconds).

Channels

The number of audio channels in the recording.

Sample rate

The sample rate of the audio in the recording (in Hertz).

Transcript

A typed document of the recording. Only available once a transcript has been uploaded.

File name

The document file name.

Uploaded

The date / time when the document was uploaded.

Size

The size of the document file (in bytes).

Tags (Optional)

Tags can be useful in the creation of [rules](#). Each tag consists of a label and an optional value.

Attachments (Optional)

Arbitrary files that are attached to the recording.

Attachments require database schema version 4 or greater. See [Administration: Database](#) for information about schema versions.

Notes (Optional)

When creating a dictation the speaker may add notes. Notes are visible to the typist.

Concepts - Concepts: Rules

Rules are used to automatically assign new dictations to a particular typing pool or typist. When a new dictation is created, it is checked against all existing rules. When all the conditions of a rule are met by a dictation, the dictation is assigned to the rule's target. Once a dictation satisfies a rule's conditions, it is not checked against any other rules.

A rule consists of the following parts:

Label (Optional)

Describes the purpose of the rule.

Rank

Rules are checked in order of rank, highest to lowest. 0 is lowest.

Conditions

Determine which dictations the rule will affect. A rule with no conditions matches all dictations.

Speaker (Optional)

The name of the user who uploaded the recording.

Priority (Optional)

The priority of the dictation.

Tag (Optional)

One of the dictation's tags.

Target

Where will dictations that match this rule be assigned?

None

Dictations must be manually assigned to typing pools by a manager.

Typing Pool

Dictations will be assigned to this typing pool, for the first available typist.

Typist

Dictations will be assigned directly to this typist.

Concepts - Concepts: Typing Pools

A typing pool is a named collection of users who have the Typist role. (See [Concepts: Users](#) for more information about user roles.) You should create a typing pool when you have more than one typist and you want to automatically assign new dictations to the first one of them that becomes available.

Dictations assigned to a typing pool are automatically assigned to a typist when all of the following conditions are met:

- The dictation has been assigned to a typing pool, but not yet assigned to a specific typist
- A typist accesses the server
- The typist has no unfinished dictations assigned
- The typist is a member of the typing pool that the dictation has been assigned to

If there are multiple unassigned dictations, the dictation with the highest urgency will be assigned first. The urgency of a dictation is calculated using its priority, deadline, and relative age.

A typing pool may hold any number of typists, and a typist may be a member of any number of typing pools.

Example

All the typists who understand difficult medical terminology are added to a typing pool called "Medical", and all the typists who understand difficult legal terminology are added to a typing pool called "Legal". A rule is then created for each speaker, targeting their dictations to the appropriate typing pool depending on what terminology the typist will need to understand.

Concepts - Concepts: Users

Each user must have one or more of the following roles:

Manager

- Can modify user accounts, typing pools, rules, and some properties of dictations
- Can see information about all dictations stored in the server
- Can receive daily, weekly, or monthly [report emails](#)

Speaker

- Can upload recordings (ie. create new dictations)
- Can download completed transcripts
- Can only see information about dictations they have created

Typist

- Can download recordings
- Can upload transcripts
- Can only see information about dictations that have been assigned to them

Administrator account

There is a special administrator account with the user name "admin". This account must be enabled and have a password configured to be able to logon to the [Web Control Panel](#) for the first time. The administrator account has the Manager role and is used to create user accounts for non-administrator users.

See [Options: Admin](#) for details.

Concepts - Concepts: Auto-Import

The auto-import feature creates new dictations from recordings imported automatically from specified locations, and is useful for integrating third-party dictation applications which cannot upload recordings directly to Express Delegate.

Note

- Auto-Import is only available in [Express Delegate Plus](#).
- Auto-import requires database schema version 3 or greater. See [Administration: Database](#) for information about schema versions.

Example

Two users record dictations and upload them to an FTP server. To auto-import recordings from both users:

- Ensure that the users are uploading their recordings to different directories on the FTP server. e.g., /Incoming/User1 and /Incoming/User2
- Ensure that the users have unique Express Delegate user accounts.
- Create an auto-import source for each user.

The properties of an auto-import source are:

Speaker

A user with the [Speaker role](#). Express Delegate Plus will create dictations using recordings imported from this auto-import source as if this user had uploaded them directly. Any number of auto-import sources can be created for each Speaker. e.g., Both a local folder, used when working on-site, and an FTP server, used when working remotely.

Result

This shows the result of the most recent attempt at checking the auto-import source for new recordings. Can be one of:

- Pending: The source has not yet been checked, or the configuration for the source has changed since the last check.
- OK: The last check was successful.
- Error: The source could not be checked, or there was a problem with one of the recordings.

Source path

Recordings can be imported from one of the follow locations:

- Local folder

A folder that is accessible from the machine that Express Delegate is running on. Some examples are:

- A folder on the Express Delegate machine. e.g., "D:\Incoming\Dr Smith"
- A folder on a network share on the LAN. e.g., "\\ServerName\Dr Smith"

Access to network shares may require permissions different than those of the default user account that the Express Delegate service runs under. See [Service Settings](#) for more information.

Note that drive letters mapped to network shares are not recognized. e.g., If drive letter Z: is mapped to \\Server\Share then you must enter \\Server\Share\Folder, not Z:\Folder.

- FTP server

An FTP server can be hosted on-site and / or Express Delegate Plus can connect to off-site servers via the internet.

Files matching the extensions enabled in [Options: File Types](#) will be imported. All other files will be ignored.

Options

- Delay between checks

Once an auto-load source has been checked for new recordings, Express Delegate Plus will wait this long before checking again.

- Recurse into sub-folders

Check for recordings in all sub-folders of the source path.

After importing files

Once a recording has been imported into Express Delegate Plus, the original file will either be deleted, or moved to a local archive folder. The archive folder should be unique for each auto-import source.

Trouble-shooting

If a problem occurs during auto-importing, a short error message will be shown in the event log on the [main window](#), and another short information message will be displayed here when the problem has been resolved. The [Web Control Panel: Auto-Import List](#)

also shows a summary of the most recent result for each auto-load source. Click the "View" button next to a source to view detailed information about the cause of an error.

Concepts - Concepts: Maintenance Mode

To maintain the integrity of the database, the server will go into maintenance mode while the database schema is being updated. (See [Options: Database](#))

Maintenance mode prevents remote users from accessing the database. Users attempting to access the [Web Control Panel](#) during maintenance will be served a message asking them to retry later.

Main Window - Main Window: Reference

Tool-bar

Online / Offline / Error

Shows the state of the web server. Click to modify [Web Access](#) options.

Web

Click to open the [Web Control Panel](#) in the default web browser.

Logs

Open the folder where the Express Delegate log files are stored.

Options

Click to open the [Options](#) dialog.

Buy Online / Upgrade

Click to purchase a license online.

Suite

Click to show task-oriented program help and information about other NCH Software products.

Help

Click to open this help file.

Event log

Real-time, time-stamped information, warnings and errors are logged here.

Main Window - Main Window: Menu Reference

File

Configuration Wizard...

Re-run the Configuration Wizard that's run when Express Delegate is installed, to configure the administrator account and email settings.

Register Software...

Purchase and register a license.

Exit (Close to Tray)

Hide the main window, showing only the icon in the notification area. The program will continue to run in the background.

Exit (Turn Off)

Quit the program.

Tools

Launch Web Control Panel

Open the Web Control Panel in the default web browser.

Show Log Files

Open the folder where the Express Delegate log files are stored.

Options...

Open the Options dialog.

Help

Help Contents

Open this help file.

Express Delegate Home Page

Open the Express Delegate home page in the default web browser.

Purchase Express Delegate Plus

Purchase a license online.

Technical Support Page

Open the Express Delegate technical support page in the default web browser.

Send Improvement Suggestion or Feedback

Open a feedback form in the default web browser.

Send Bug Report

Open a bug report form in the default web browser.

Signup to Newsletter

Open the newsletter signup page in the default web browser. The newsletter is a regular email including notifications of new NCH Software releases and special offers.

Install Related Tools and Extras...

Show information about related NCH Software programs, with the option of automatically downloading and installing them.

Check for Updated Version...

Check the NCH Software server for a more recent version of Express Delegate.

Dictation Software Download Catalog

Show information about other NCH Software dictation programs.

NCH Software Home Page

Open the NCH Software home page in the default web browser.

About Express Delegate...

Open the About dialog.

Options - Options: Overview

The Options dialog contains the following tabs:

Startup

Administration

Web Access

Database

Email

File Types

Options - Options: Startup

To view the startup options, select the "Tools -> Options" menu item and select the "Startup" tab. Use the startup options to configure when and how the program should be automatically run.

Auto-run

Run this program automatically

Automatically run the program using one of the start methods listed below.

Start method

Select when the service will be run (either when the operating system starts up or when a user logs on to the operating system), and which operating system users the program's tray icon will be visible to.

Service settings

Click to open the Service Settings dialog, where service account, timing, security, and error notification settings can be configured.

Options - Options: Administration

To view the administration options, select the "Tools -> Options" menu item and select the "Administration" tab. The administrator account is available through the Web Control Panel by entering "admin" as the logon email address. This account gives access to the full functionality of the Web Control Panel, including all manager-only features. When possible, consider using a regular manager account instead.

Administrator account

Enable

Enable use of the administrator account.

Account

Must be "admin".

Password / Re-type password

The password used for the "admin" account on the logon page of the Web Control Panel. An empty password is not allowed.

Options - Options: Web Access

To view the web access options, select the "Tools -> Options" menu item and select the "Web Access" tab, or click on the Online / Offline button on the tool-bar. These options determine how clients can connect to the server, and apply to both users of the Web Control Panel and users of other client programs.

Please refer to Routing Options Page for details.

Options - Options: Database

To view the database options, select the "Tools -> Options" menu item and select the "Database" tab. The database stores all recordings, transcripts, user account details, rules, typing pool details, etc.

Database details

Shows the version number of Express Delegate that was used to create the database, and the database schema version. See [Administration: Database](#) for an explanation of database schema versions and associated warning messages.

Schema update

If the database is using a superseded schema version then an "Update schema..." button will be shown. Updating the database schema can enable some features that are incompatible with older schema versions. Updating the database schema is optional.

Note: The server will go into maintenance mode while the update occurs.

Warning: Make a backup of the database before updating the schema.

Options - Options: Email

To view the email options, select the "Tools -> Options" menu item and select the "Email" tab. Email must be configured properly in order to use the following features:

- To send reset password notifications to users who use the "Forgot your password?" link on the Logon page of the Web Control Panel
- To send report emails
- To send notification emails

Settings

Click "Email settings" to configure the server address, user account details, and other email settings.

Send test mail

Click "Send" to send a test email to the email address in the "To" field, to verify that email settings have been configured correctly.

See also: Problems when sending email using our software

Options - Options: File Types

To view the file types options, select the "Tools -> Options" menu item and select the "File Types" tab. Express Delegate can be configured to allow or disallow the uploading of recordings made in various audio formats. At least one file type must be allowed.

Note

- The following information applies to recordings being uploaded to Express Delegate using the "Create New Dictation" feature of the Web Control Panel. It also applies to recordings discovered by the auto-import feature. It does not apply to recordings uploaded from compatible client programs using the direct Express Delegate send method.

Audio formats fall into one of three categories:

- Formats handled natively by Express Delegate

Can be loaded without any optional or third-party software.

- Formats that require an optional component from NCH Software

The required component will be automatically downloaded and installed when the corresponding audio format is enabled for the first time. For this to succeed, the Express Delegate service must not be blocked from making outgoing connections to the NCH Software web server.

- Formats that require a third-party codec or application to be installed

The third-party software must be installed on the Express Delegate server machine before attempting to load a file of this type. Examples of third-party software that may be required are Real Player (for RA / RAM files), and Sony Player Plug-in for Windows Media Player (for DVF / MSV files).

See File Formats Technical Support for solutions to common questions about audio formats.

Web Control Panel - Web Control Panel: Overview

The Web Control Panel gives access to many of Express Delegate's features through your web browser.

Note

- Some features will not work if JavaScript is not enabled in your web browser.

Accessing the Web Control Panel

- From the server

In the Express Delegate main window, click the "Web" button on the tool-bar or select the menu item "Tools -> Launch Web Control Panel".

- From a client

Run the web browser and type the address of the Express Delegate server, including port number (e.g., <http://server.company.com:56789>), into the address bar and hit "Enter" or click the "Go" button. For connections to secure ports, use <https://> instead of <http://>.

Tabs in the Web Control Panel:

About

Logon

Dictations

Rules

Typing Pools

Users

Auto-Import

Options

Log

Web Control Panel - Web Control Panel: About

Build date:

The date the Express Delegate executable was built.

Database ID:

Can be used to determine which database is being accessed if your organization is running multiple Express Delegate servers, or when migrating data to a new server.

Database schema version:

When upgrading to a newer version of Express Delegate, the database schema (the format of the information in the database) may be changed. See [Administration: Database](#) for more information.

SDK version:

The Express Delegate SDK is used by [client programs](#) when accessing the server. If the client program does not support the latest SDK version then some features of Express Delegate may not be supported.

Server name:

A customizable name given to this server. Can be changed by the administrator by clicking the Edit button.

Server description:

A customizable description of this server. Can be changed by the administrator by clicking the Edit button.

Web Control Panel - Web Control Panel: Logon

User Name

Your email address. (Or "admin" for the administrator account).

Password

Your password.

Forgot your password?

Click here to reset your password if you have forgotten it. Your new password will be emailed to you.

Remember me on this computer

Check this box to avoid having to logon again.

Login

Click to login.

Web Control Panel - Web Control Panel: Dictations

Please refer to [Concepts: Dictations](#) for an overview of dictations.

Note

- Managers can see all dictations, non-managers can only see dictations created by them (as speaker) or which are assigned to them (as typist).
- The list of dictations is broken into sub-lists, grouped by status. Not all will be visible to non-managers.

To download a recording as a DCT file:

Click on the link in the "Recording" column of the desired dictation.

To upload a transcript: (Managers and typists only)

If a transcript has not yet been uploaded, you can click on the "Upload" button in the "Transcript" column of the desired dictation to upload one.

To download a transcript:

If a transcript has been uploaded, you can click on the link the "Transcript" column of the desired dictation to download it.

To view the properties of a dictation:

Click the "View" button to the right of the dictation that you want to view to go to the "View Dictation Details" page. You will be able to view, but not modify, the dictation's properties.

To edit the properties of a dictation: (Managers and speakers only)

Click the "Edit" button to the right of the dictation that you want to view to go to the "Edit Dictation Details" page. You will be able to modify some of the dictation's properties. Note: You cannot edit a finished dictation.

To create a new dictation: (Speakers only)

Click the "Create new" button to go to the "Create New Dictation" page, where you will be able to upload a new recording.

To change the priority of one or more dictations: (Managers only)

Check the box to the left of each dictation that you want to change, then click the "Change priority" button. On the next page you can select the desired priority from the drop-down list, then click "Save" to apply your changes. The same priority will be applied to all selected dictations. Note: You cannot change the priority of a finished dictation.

To assign or reassign one or more dictations to a typing pool and / or typist: (Managers only)

Check the box to the left of each dictation that you want to change, then click the "Reassign" button. On the next page you can select the desired typing pool and /or typist from the drop-down lists, then click "Save" to apply your changes. All selected dictations will be assigned to the same typing pool and / or typist. Note: You cannot reassign a finished dictation.

To delete one or more dictations: (Managers and speakers only)

Check the box to the left of each dictation that you want to delete, then click the "Delete" button. On the next page you will be prompted to confirm the deletion.

Web Control Panel - Web Control Panel: Rules

Please refer to [Concepts: Rules](#) for an overview of rules.

Note

- This tab is only available to managers.

To view the properties of a rule:

Click the "View" button to the right of the rule that you want to view to go to the "View Rule Details" page. You will be able to view, but not modify, the rule's properties.

To edit the properties of a rule:

Click the "Edit" button to the right of the dictation that you want to view to go to the "Edit Rule Details" page. You will be able to modify the rule's properties.

To create a rule:

Click the "Create new" button to go to the "Create New Rule" page.

To delete one or more rules:

Check the box to the left of each rule that you want to delete, then click the "Delete" button. On the next page you will be prompted to confirm the deletion.

Web Control Panel - Web Control Panel: Typing Pools

Please refer to [Concepts: Typing Pools](#) for an overview of typing pools.

Note

- This tab is only available to managers.

To view the properties of a typing pool:

Click the "View" button to the right of the typing pool that you want to view to go to the "View Typing Pool Details" page. You will be able to view, but not modify, the typing pool's properties.

To edit the properties of a typing pool:

Click the "Edit" button to the right of the typing pool that you want to view to go to the "Edit Typing Pool Details" page. You will be able to modify the typing pool's properties.

To create a typing pool:

Click the "Create new" button to go to the "Create New Typing Pool" page.

To delete one or more typing pools:

Check the box to the left of each typing pool that you want to delete, then click the "Delete" button. On the next page you will be prompted to confirm the deletion.

Web Control Panel - Web Control Panel: Users

Please refer to [Concepts: Users](#) for an overview of users.

Note

- This tab is only available to managers.

To view the properties of a user:

Click the "View" button to the right of the user that you want to view to go to the "View User Details" page. You will be able to view, but not modify, the user's properties.

To edit the properties of a user:

Click the "Edit" button to the right of the user that you want to view to go to the "Edit User Details" page. You will be able to modify the user's properties.

To create a user:

Click the "Create new" button to go to the "Create New User" page.

To delete one or more users:

Check the box to the left of each user that you want to delete, then click the "Delete" button. On the next page you will be prompted to confirm the deletion.

Web Control Panel - Web Control Panel: Auto-Import

Please refer to [Concepts: Auto-Import](#) for an overview of the auto-import feature.

Note

- Auto-import is only available in [Express Delegate Plus](#).
- Auto-import requires database schema version 3 or greater. See [Administration: Database](#) for information about schema versions.
- This tab is only available to managers.

To view the properties of an auto-import source:

Click the "View" button to the right of the auto-import source that you want to view to go to the "View Auto-Import Source Details" page. You will be able to view, but not modify, the source's properties.

To edit the properties of an auto-import source:

Click the "Edit" button to the right of the auto-import source that you want to view to go to the "Edit Auto-Import Source Details" page. You will be able to modify the source's properties.

To create an auto-import source:

Click the "Create new" button to go to the "Create New Auto-Import Source" page.

To delete one or more auto-import sources:

Check the box to the left of each auto-import source that you want to delete, then click the "Delete" button. On the next page you will be prompted to confirm the deletion.

Web Control Panel - Web Control Panel: Options

Note

- This tab is not available to the administrator.
- The event log requires database schema version 1 or greater. See [Administration: Database](#) for information about schema versions.

Time Zone

Dates and times displayed in Web Control Panel pages are automatically converted to your local time zone by your web browser. However, some features of Express Delegate that do not rely on a web browser, such as the scheduling of report emails, will default to using the time zone of the server that Express Delegate is installed on. Set your time zone here if you are located in a different time zone to the server and you use Express Delegate's scheduling features.

Reports

Note

- Reports are only available in [Express Delegate Plus](#).
- Reports are only available to users with the [role](#) of Manager.

You can disable report emails, or have them emailed to you daily, weekly, or monthly.

Report emails contain the following information:

- The number of dictations created during the report period
- The number of transcripts uploaded during the report period
- The remaining number of unfinished dictations
- The remaining duration of all unfinished dictations
- The age of the oldest unfinished dictation

Notifications

Note

- Notifications are only available in [Express Delegate Plus](#).

You can choose to have a notification emailed to you when:

- Manager
 - Any dictation is created
 - Any finished transcript is uploaded
- Speaker
 - A finished transcript is uploaded for you
- Typist
 - A recording is assigned to one of your typing pools
 - A recording is assigned to you

Web Control Panel - Web Control Panel: Log

Note

- The event log is only available to users with the role of manager.
- The event log requires database schema version 1 or greater. See [Administration: Database](#) for information about schema versions.

Each entry in the event list consists of:

- The date and time that the action occurred
- The email address of the user that performed the action
- The action that was performed (e.g., Created, Downloaded, Deleted, etc.)
- The type of object that the action was performed on (e.g., Rule, Typing Pool, Dictation, etc.)
- A short description of the object and / or action

Use the page navigation buttons at the bottom of the list to view older or newer log entries.

Log entries are mirrored to:

- The event log on the [main window](#) (which only shows events from the current session)
- Text files in the Logs sub-folder of the Express Delegate program data folder

Screen References - Options ~ Web Access

Browser Access

For more information on setting up Browser Access, see this Knowledge Base article:
www.nch.com.au/kb/10233.html