



T-Pro Sync User Manual

Document Revision 2.2

Getting Started with T-Pro Sync

Document History

Revision	Date	Chapter & Changes	Author
2.2	26/01/2024	Forgot password option added	SMC
2.1	28/02/2023	How to launch the app when a recording device is attached	SMC
2.0	24/02/2023	Published as version 2.0	SMC
1.2	22/02/2023	- Merging this standard manual with T-Pro Sync MS Windows Server manual - adding Microsoft Signin	SMC
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1.0	12/10/2022	Published	SMC
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0.1	23/09/2022	First DRAFT version	SMC

Getting Started with T-Pro Sync

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Getting Started with T-Pro Sync

1. Introduction

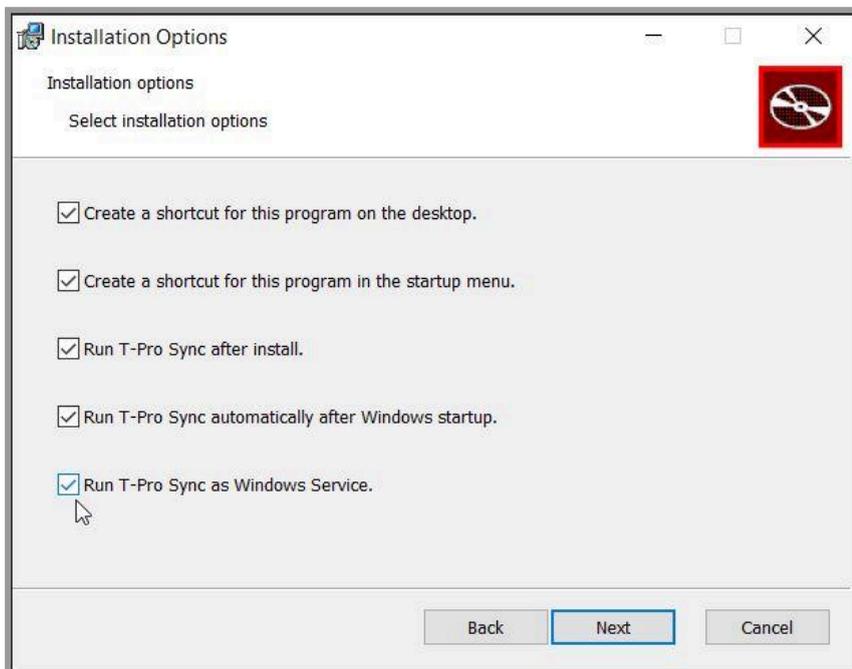
T-Pro Sync is an application that runs on your computer and allows you to upload external recordings directly into the T-Pro web application. Any audio file done with a dictaphone can be used.

2. Installation

The installation file will be provided by T-Pro for download.

1. Run the file on your computer.

During the installation process you have the following options:

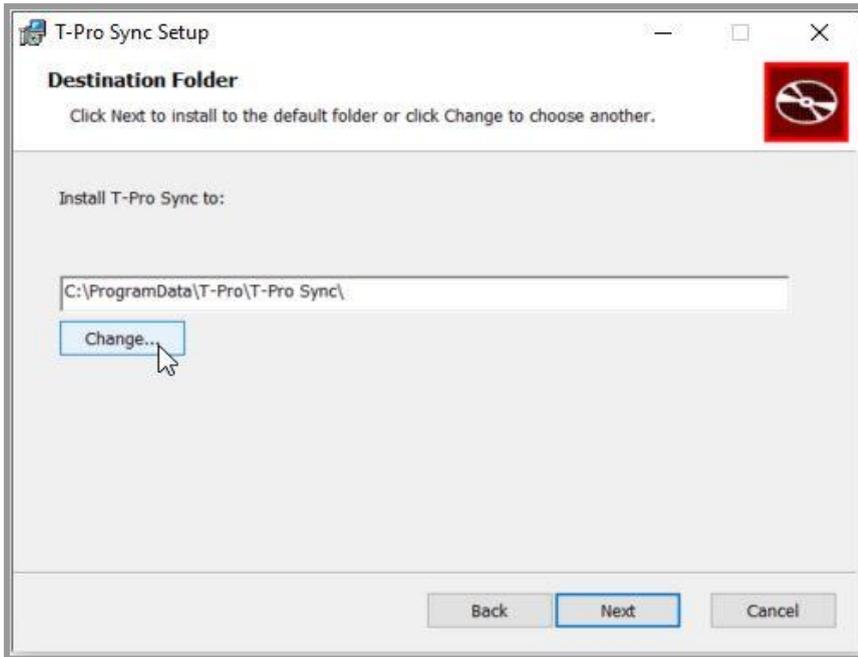


T-Pro Sync Setup Wizard

- Create a shortcut on your desktop.
- Create a shortcut in the startup menu.
- Launch the program after installation.
- Launch the program at every startup.
- Enable to run the program as a [Windows service](#)

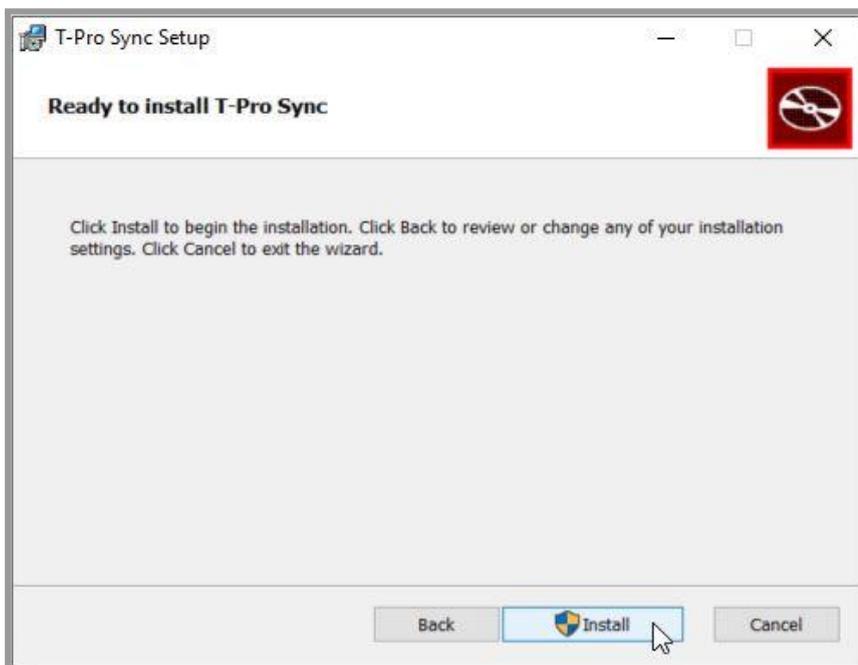
2. Click on **Next** to view the installation location or click **Change** to manually select another installation folder.

Getting Started with T-Pro Sync



The default installation folder

3. Click **Next** again, then click **Install**.



Begin the installation

You'll see the progress and when clicking **Finish** the application automatically launches the login screen.

Getting Started with T-Pro Sync

NOTE: If you have an external microphone / recording device attached to your pc at the time of installation and the login screen does not open automatically, just click on the desktop icon to start the application.

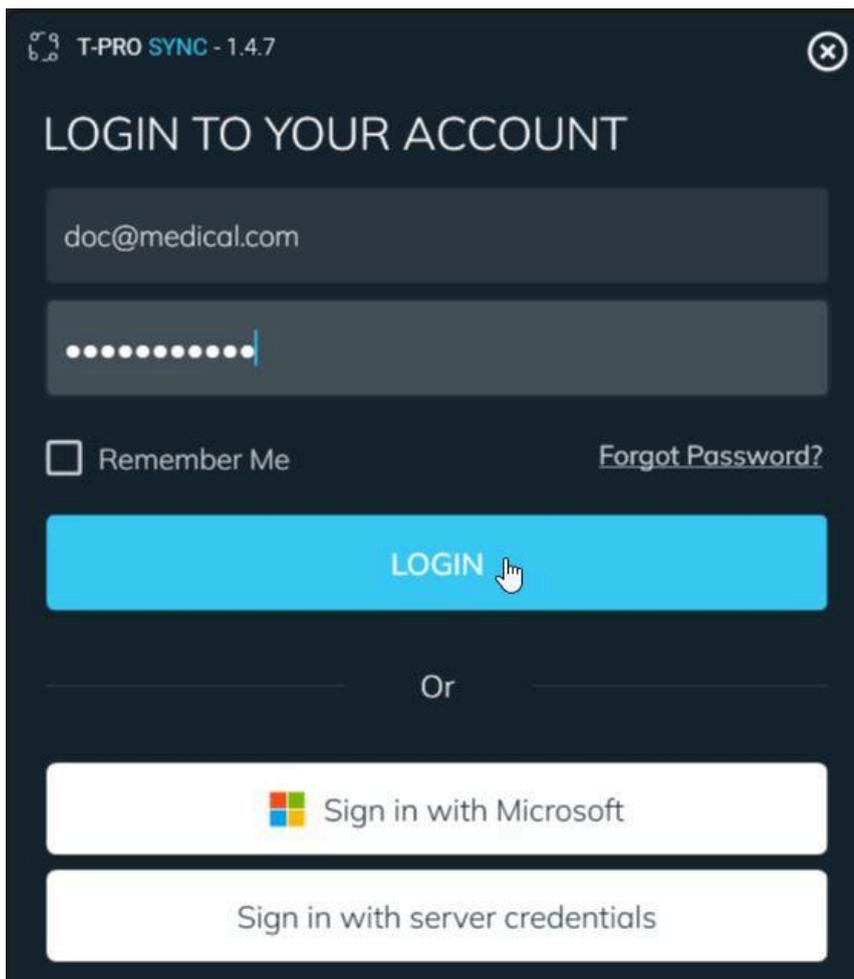


3. Login Options

There are different login options to access the application depending on your organisation's needs. Your credentials only work in the respective fields.

3.1 T-Pro Login

Enter your T-Pro user email and password, and click on LOGIN.



Login screen can remember your T-Pro credentials

Getting Started with T-Pro Sync

=> The application opens presenting a space to add a folder.

Remember Me Option

Ticking the option *Remember Me* at login keeps you logged in even when you close the app via the system tray (see below [Closing the application](#)).

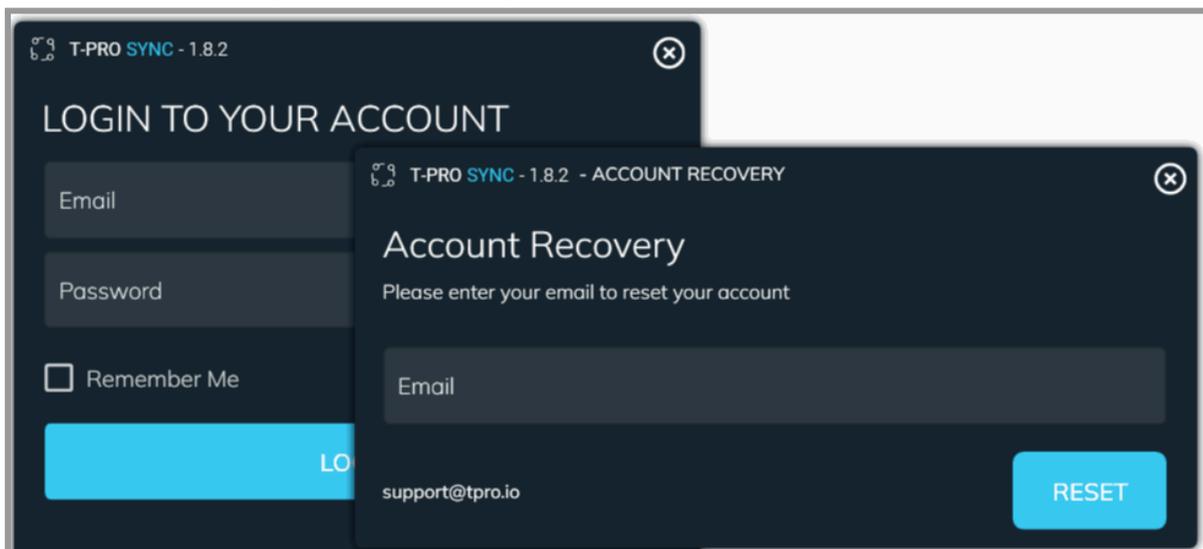
=> Use the desktop icon to access the app again; the login screen will be skipped.

Forgot Password

There is one more option on the login screen: Click on **Forgot Password?** when you're having trouble signing in.

NOTE: This only works for your regular T-Pro credentials.

The account recovery screen comes up.

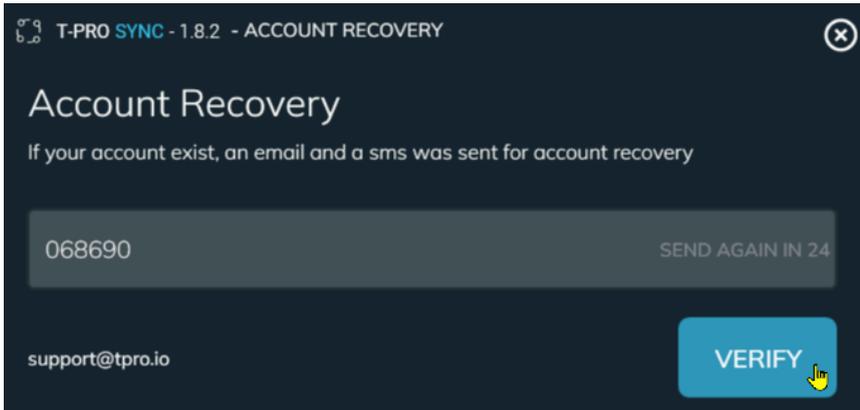


Account recovery step 1

Enter your user email address and click on RESET. If you have set up a contact email address and/or mobile number you will receive a verification code.

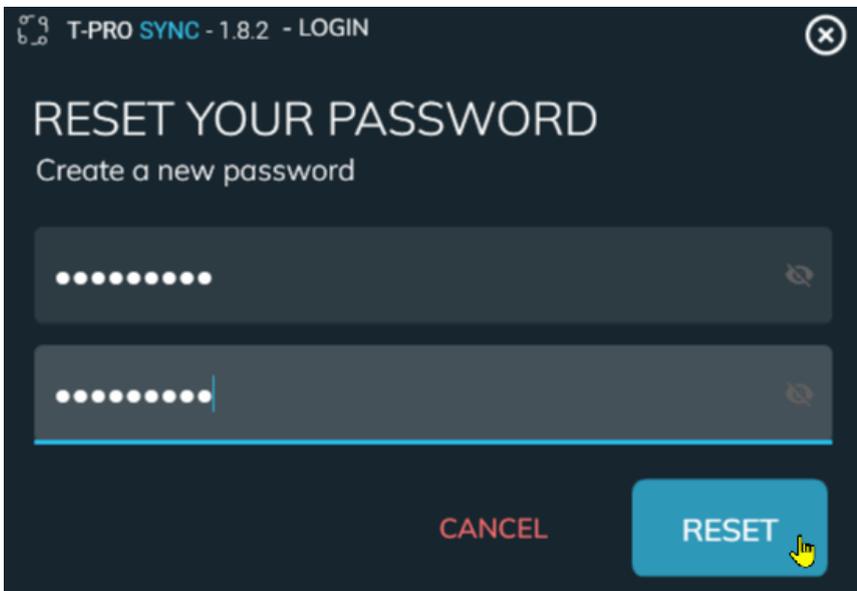
Retrieve this code and enter it into the field.
Click on VERIFY.

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Account recovery step 2

The RESET YOUR PASSWORD screen comes up.



Account recovery step 3

Enter your new password in the first field and confirm it in the second field.
Click on RESET to complete this process.
=> Your password has been updated and you can sign in again.

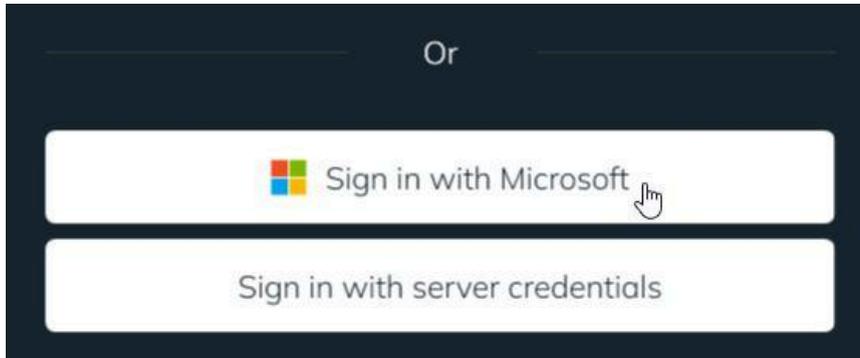
Click [here if you work with T-Pro Sync as an author](#).

Click [here if you work with T-Pro Sync as a clerical user](#) (transcriber, editor, etc.)

Getting Started with T-Pro Sync

3.2 Microsoft Login

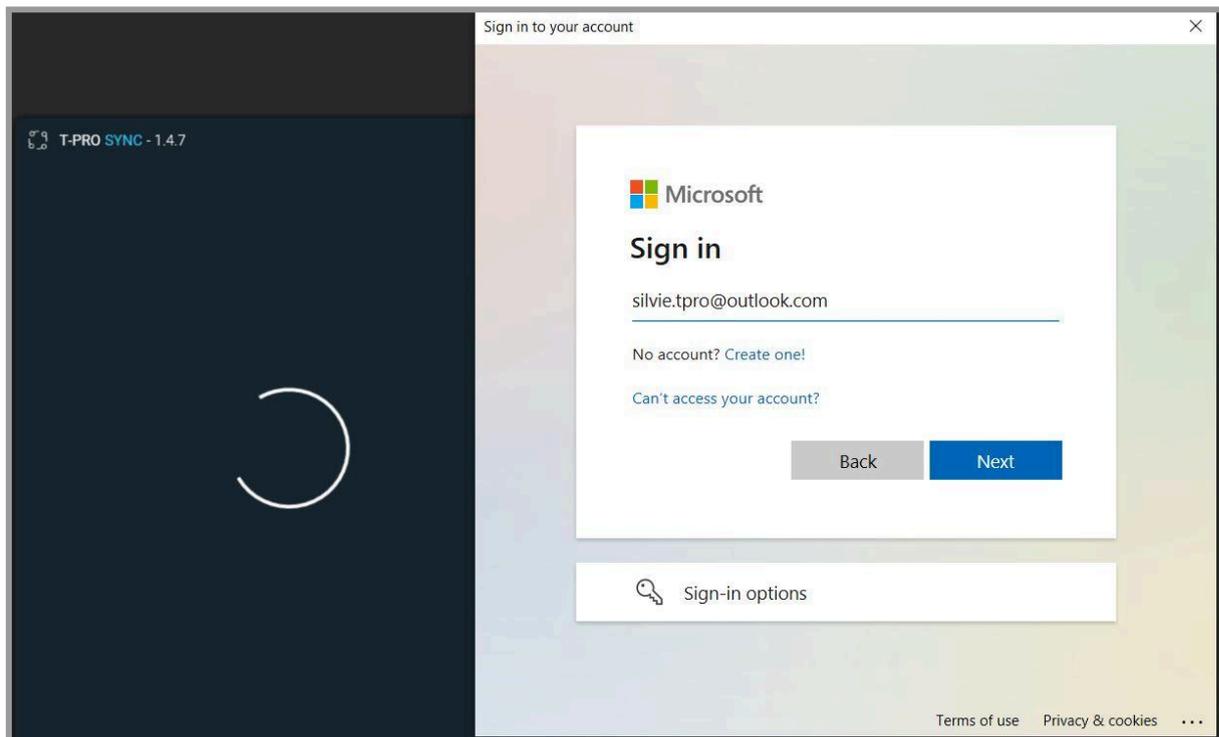
If your organisation is working with Microsoft email accounts, click on SIGN IN WITH MICROSOFT.



Select the login process to use your Microsoft account

The Microsoft sign in window opens.

1. Enter your Microsoft email address and click on **Next**.



T-Pro Sync with Microsoft sign in

2. Enter your Password and sign in.

=> The application opens presenting a space to add a folder.

Click [here if you work with T-Pro Sync as an author](#).

Getting Started with T-Pro Sync

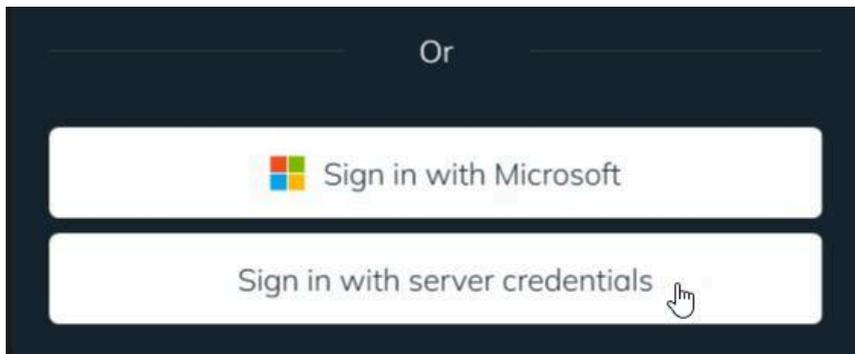
Click [here if you work with T-Pro Sync as a clerical user](#) (transcriber, editor, etc.)

3.3 Login Process for Automatic Uploads (Windows Service)

Use this login option if you want T-Pro Sync to perform automatic uploads in the background, even if the Sync app is not running.

Click on **Sign in with server credentials**.

NOTE: This establishes a separate login to your default T-Pro user login.

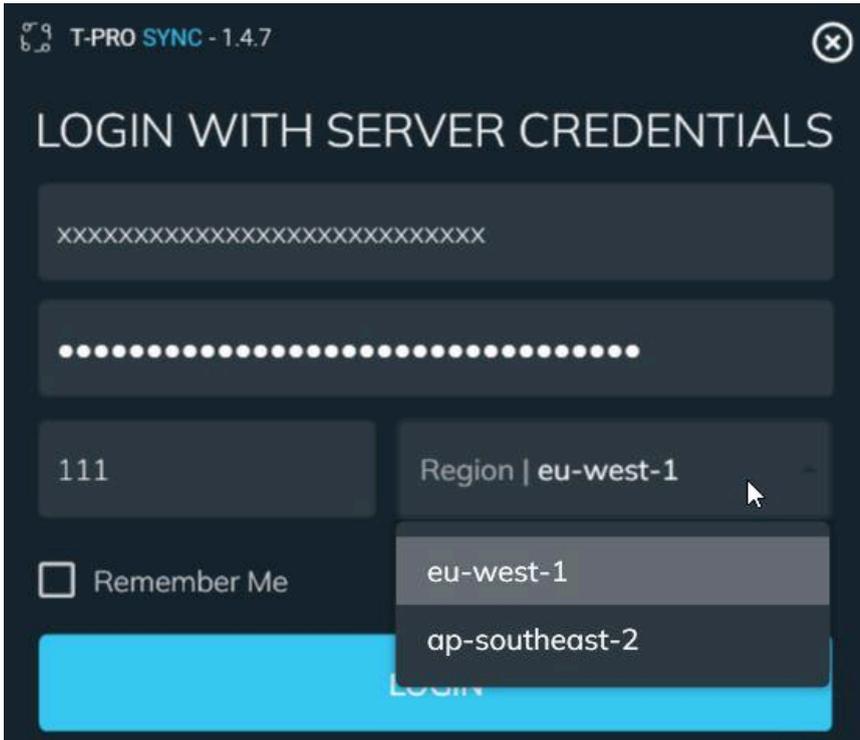


Switch here to log in with your AWS credentials

Server credentials will be provided from T-Pro.

1. Enter the Access Key Id
2. Enter the Secret Access Key
3. Enter the ID of your organisation
4. Select your region
5. Click on LOGIN.

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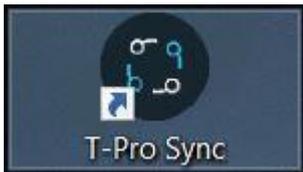


AWS credentials login screen

=> The application opens presenting a space to add a folder.

4. Opening the Application

Open the application via the desktop icon.



Doubleclick on the icon

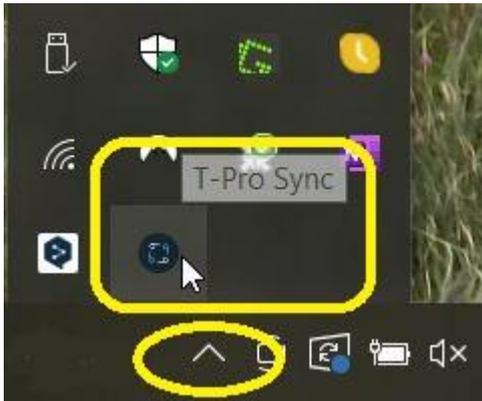
Once you are logged in and the application window is open, there is also an icon visible on the task bar.



T-Pro Sync is open

If you do not have the taskbar icon, the app has been minimised and is running in the background. Go to the system tray and reopen it from there.

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Open T-Pro Sync via the system tray

NOTE: If the app is running in the background you cannot open it via the desktop icon. Go to the system tray and reopen it from there.

Attaching / Detaching recording devices

You can attach and detach external recording devices at any time.

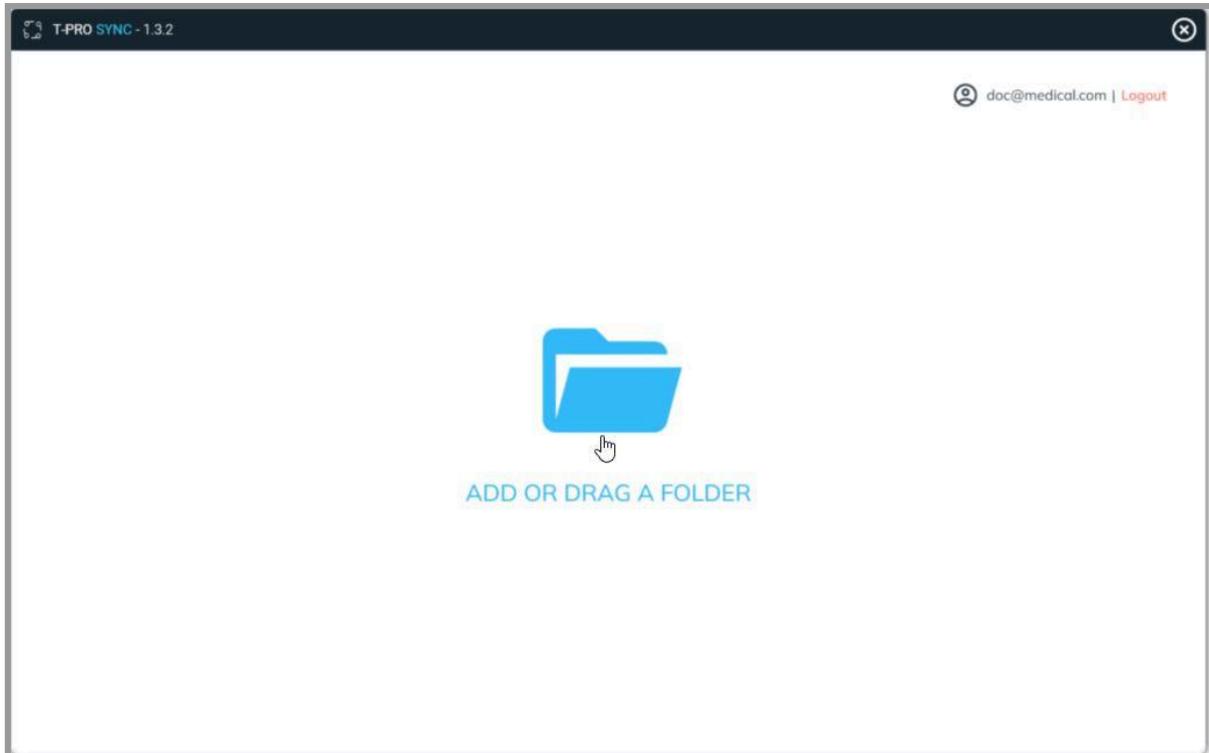
Remember to open T-Pro Sync via the system tray if you have previously minimised the application window.

5. The Workspace

Depending on the user role different options are available to you. We explain those in the sections Author Role and [Transcriber Role](#) below.

Getting Started with T-Pro Sync

5.1 Author Role



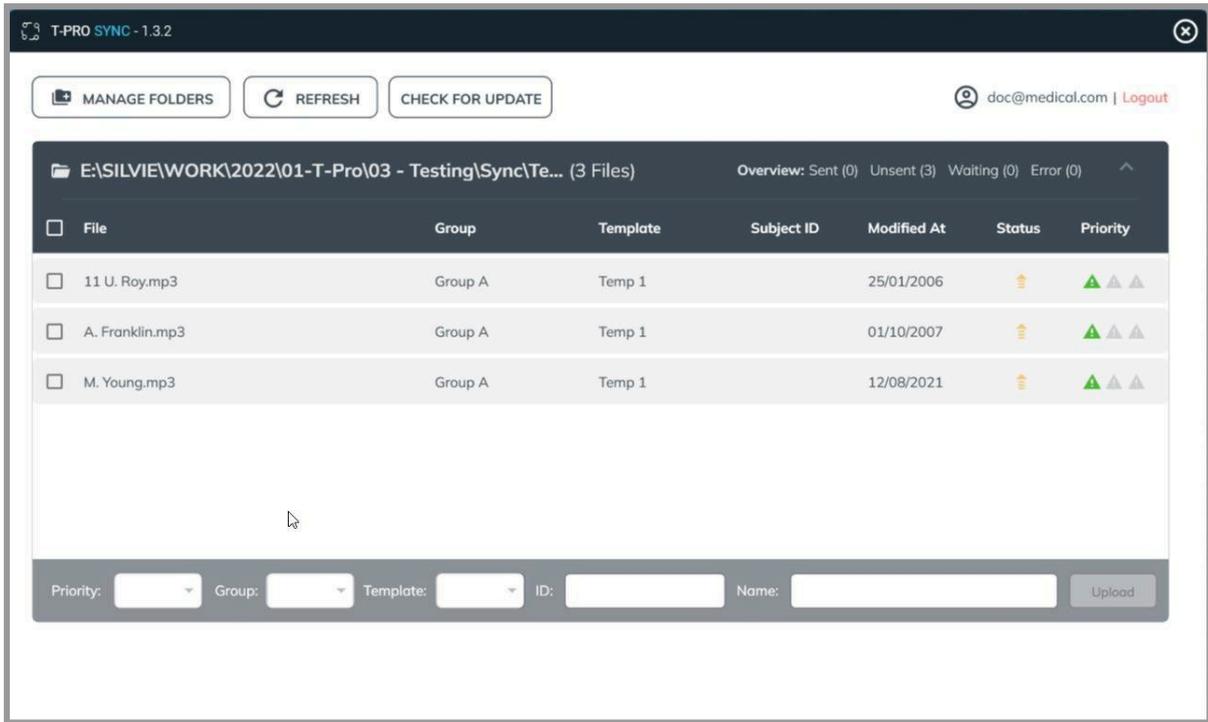
Workspace for folder upload after first login

Drag and drop a folder containing your dictation files onto the workspace. You can also click and select a folder location manually.

- The folder will get connected with T-Pro Sync.
- The folder should contain the audio files you want to process with T-Pro.
- Any audio file created with a dictaphone can be uploaded this way.
- Individual audio files cannot be dragged to the workspace.

Using the application as an author gives you the following options:

Getting Started with T-Pro Sync



Workspace after folder upload displaying the files

The workspace lists the folder content as individual audio files.

- Information such as Group and Template originate from your (the author's) default user settings.
- There are three status icons:
Orange = Awaiting upload
Blue = processing upload
Green = Uploaded



5.1.1 Changing and adding file information

Select a file by ticking the box at the start of the line.

Getting Started with T-Pro Sync

<input type="checkbox"/>	File	Group	Template
<input type="checkbox"/>	11 U. Roy.mp3	Group A	Temp 1
<input type="checkbox"/>	A. Franklin.mp3	Group A	Temp 1
<input checked="" type="checkbox"/>	M. Young.mp3	Group A	Temp 1

Priority: Group: Template: ID:

Change the settings for the selected file

Next, click into the fields at the bottom to change

- Priority - **Green** = Normal
- **Orange** = High
- **Red** = Urgent
- Group
- Template

You can also manually enter a patient ID and/or patient name for the selected file.

<input type="checkbox"/>	11 U. Roy.mp3	Group A	Temp 1		25/01/2006		
<input checked="" type="checkbox"/>	A. Franklin.mp3	Group A	Temp 1	F.000121	01/10/2007		
<input type="checkbox"/>	M. Young.mp3	Group A	Temp 1	M-0101112	12/08/2021		

Added patient ID and changed priority

Click on **Upload** to upload the selected file.

5.1.2 Bulk Upload

Instead of selecting the files individually, tick the box in the header to select all files.

<input checked="" type="checkbox"/>	File	Group	Template
<input checked="" type="checkbox"/>	11 U. Roy.mp3	Group A	Temp 1
<input checked="" type="checkbox"/>	A. Franklin.mp3	Group A	Temp 1
<input checked="" type="checkbox"/>	M. Young.mp3	Group A	Temp 1

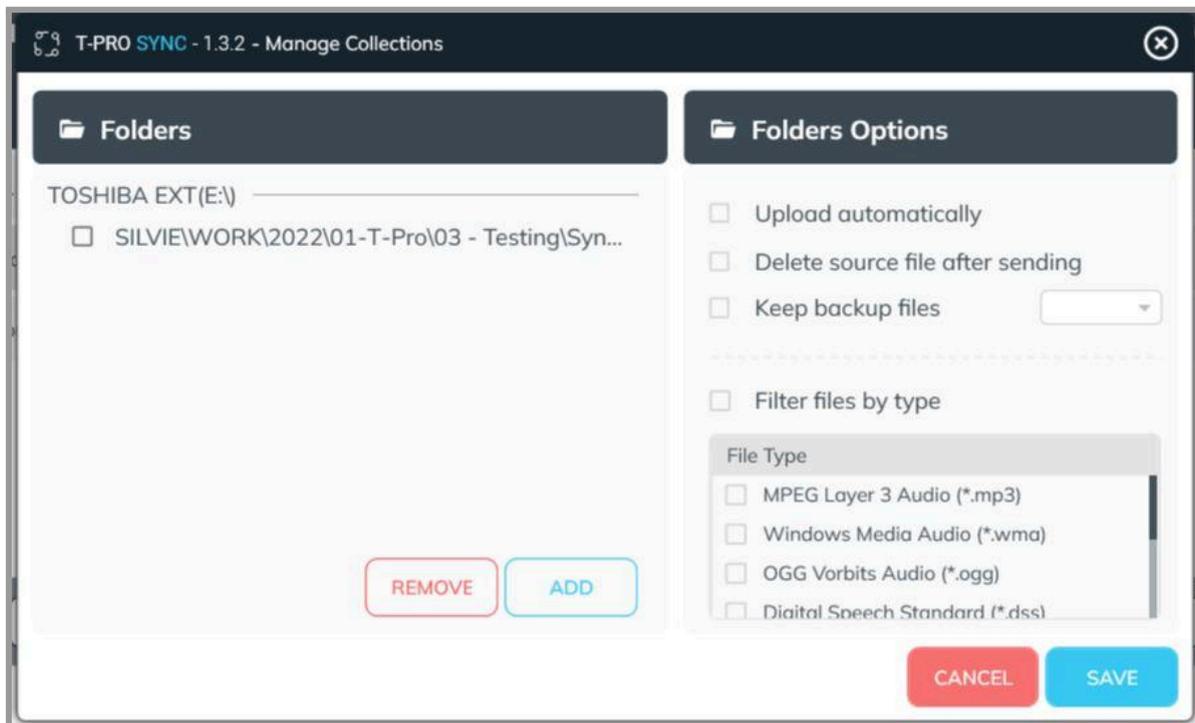
Selecting all files with one click

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Click on **Upload** to upload all files in one go.

5.1.3 MANAGE FOLDERS

Use the button to manage your folders:



View folders and folder options

Folders

On the left side you see the folder(s) listed which connect with T-Pro Sync. Audio files placed in these folders will be synced with the program.

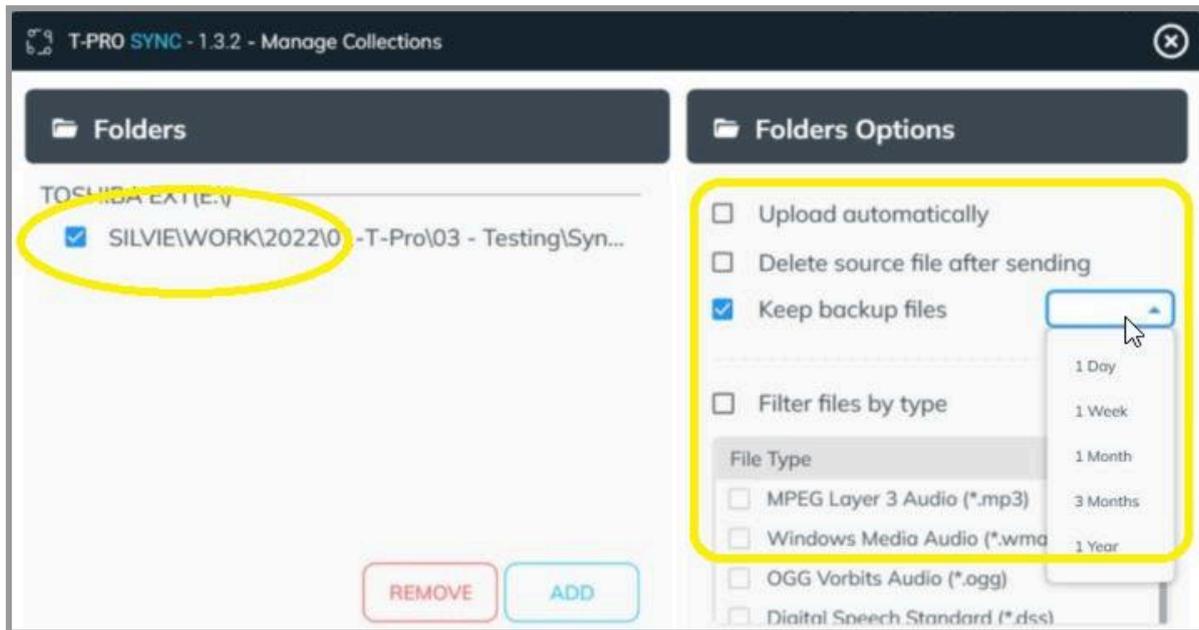
Here, you can also ADD or REMOVE folders which work with T-Pro Sync.

Folder Options

First select the relevant folder on the left side to enable the folder options (on the right).

- Automatic upload of files within the selected folder - checking for and uploading new audio files every 15 seconds
- Deletion of the source file after upload
- Keeping backup files for the selected duration

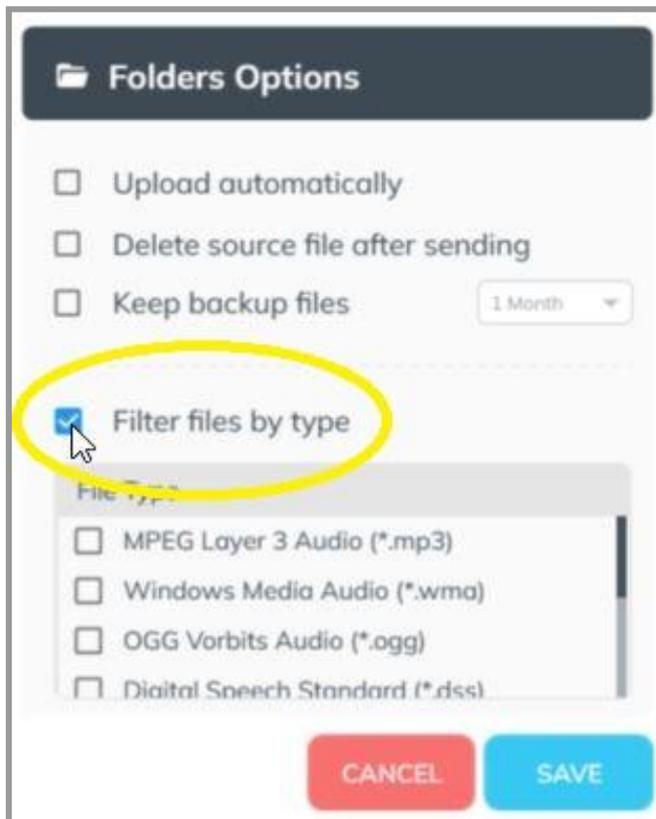
Getting Started with T-Pro Sync



Manage folders menu

File Type

Activate the option to filter files by type. Only the selected file types will then be displayed in the upload list (see screenshot [main workspace](#)).



File type selection filter

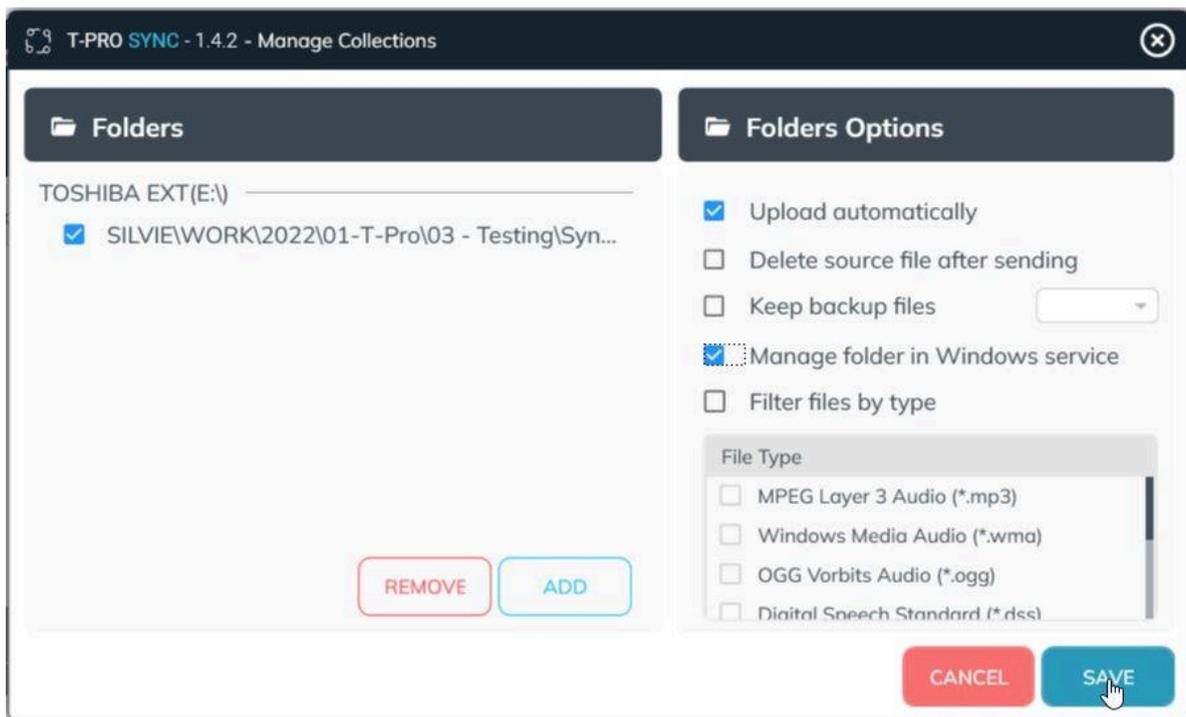
Getting Started with T-Pro Sync

Tick the box for the files you want to include for the upload.

Click the button to **SAVE** your settings.

Windows Service Settings

If you want to set up T-Pro Sync to work as a Windows Service the options **Upload automatically** and **Manage folder in Windows service** both have to be enabled.

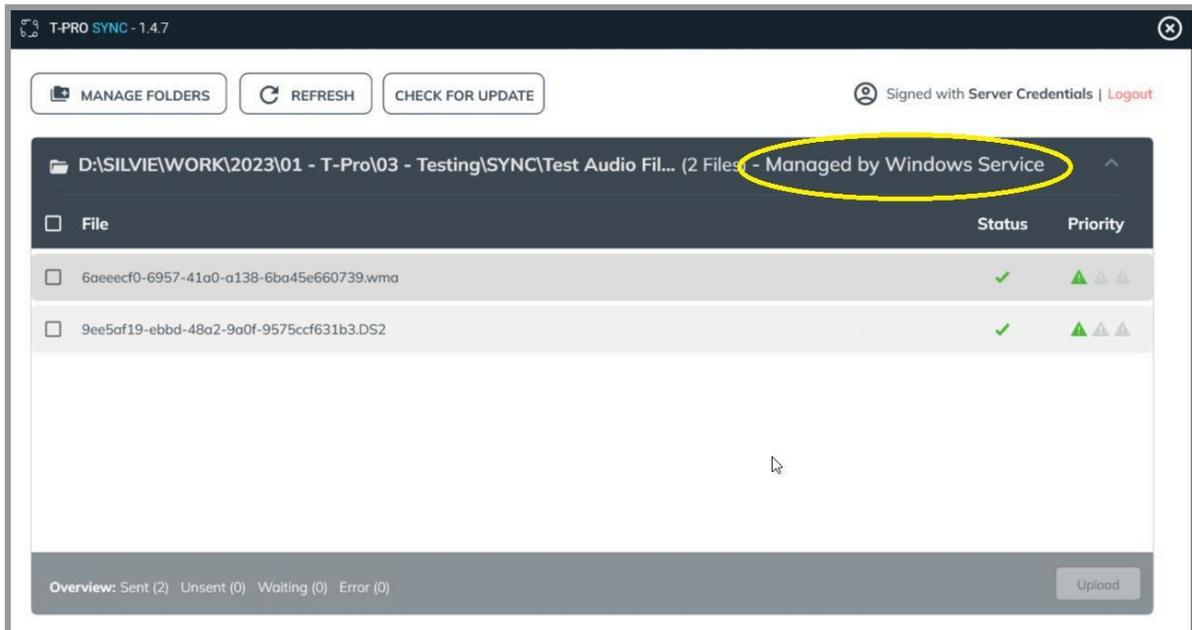


Sample settings for Windows service upload

Click on SAVE.

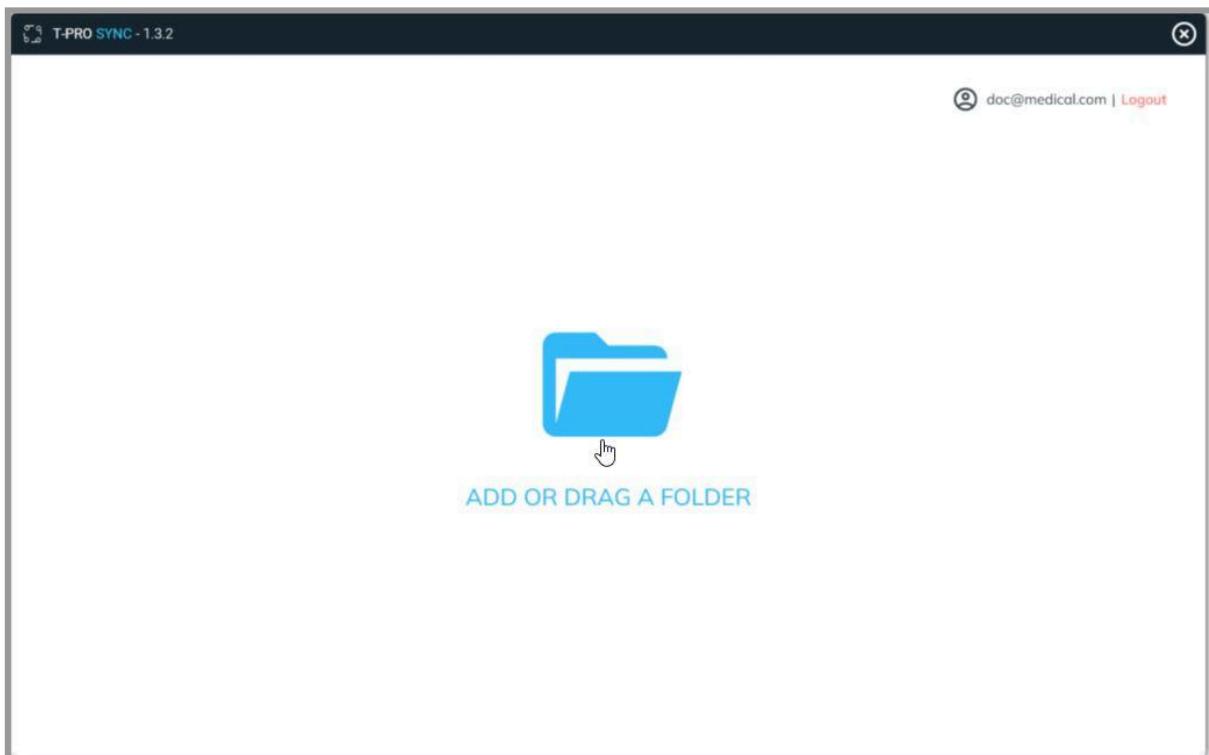
=> In the main window you can see that the folder is managed by Windows Service.

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Folder managed by Windows Service

5.2 Transcriber Role



Workspace for folder upload after first login

Drag and drop a folder containing dictation files onto the workspace. You can also click and select a folder location manually.

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- The folder will get connected with T-Pro Sync.
- The folder should contain the audio files you want to process with T-Pro.
- Individual audio files cannot be dragged to the workspace.
- Any audio file created with a dictaphone can be uploaded this way.
- Each folder needs to be linked to an author.

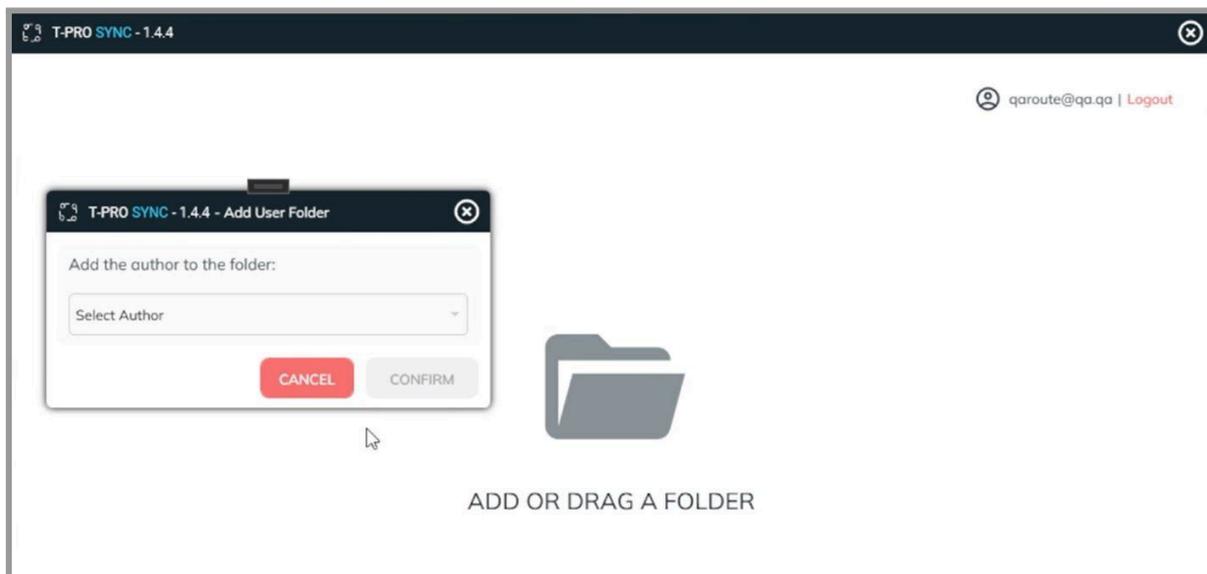
5.2.1 Link an author with a folder

It is crucial that each audio file is linked to its creator (the author). Normally this is done by setting a default author to a folder. If you work with various different authors you need to select the right one from the dropdown menu.

There is also the option to [manually select an author](#) if this is necessary.

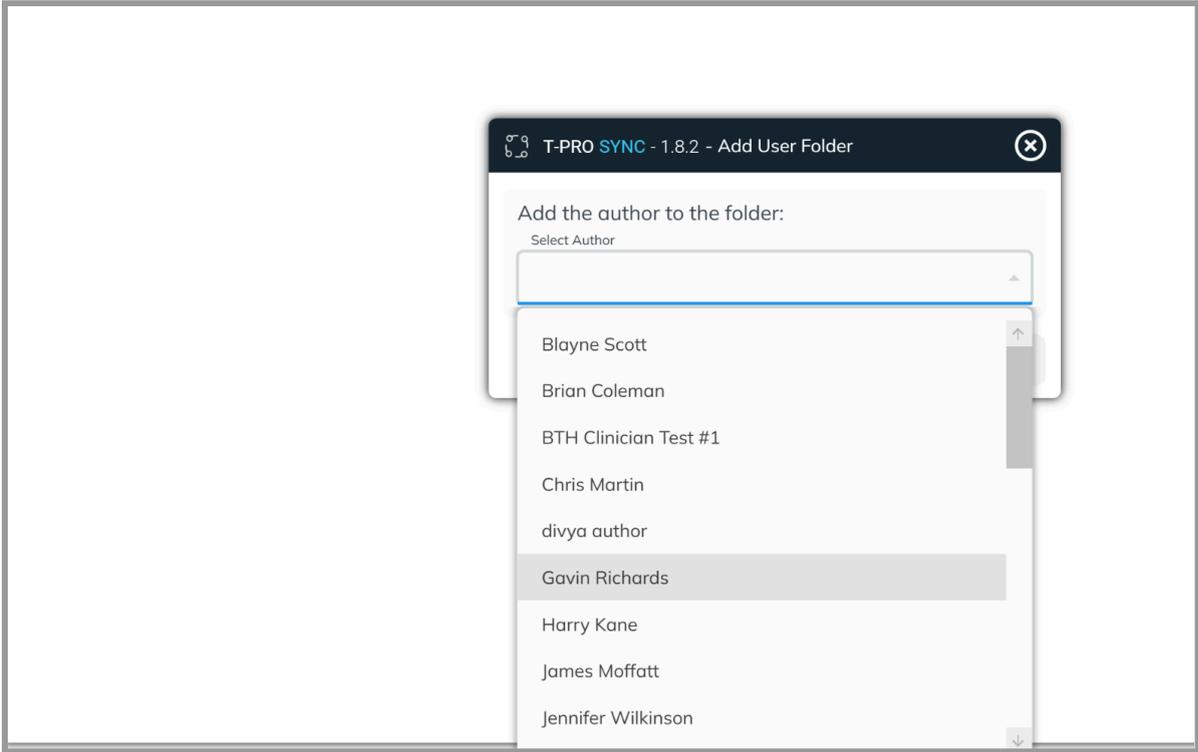
First time use

When you move a folder to the workspace the *Add User Folder* window will automatically come up.



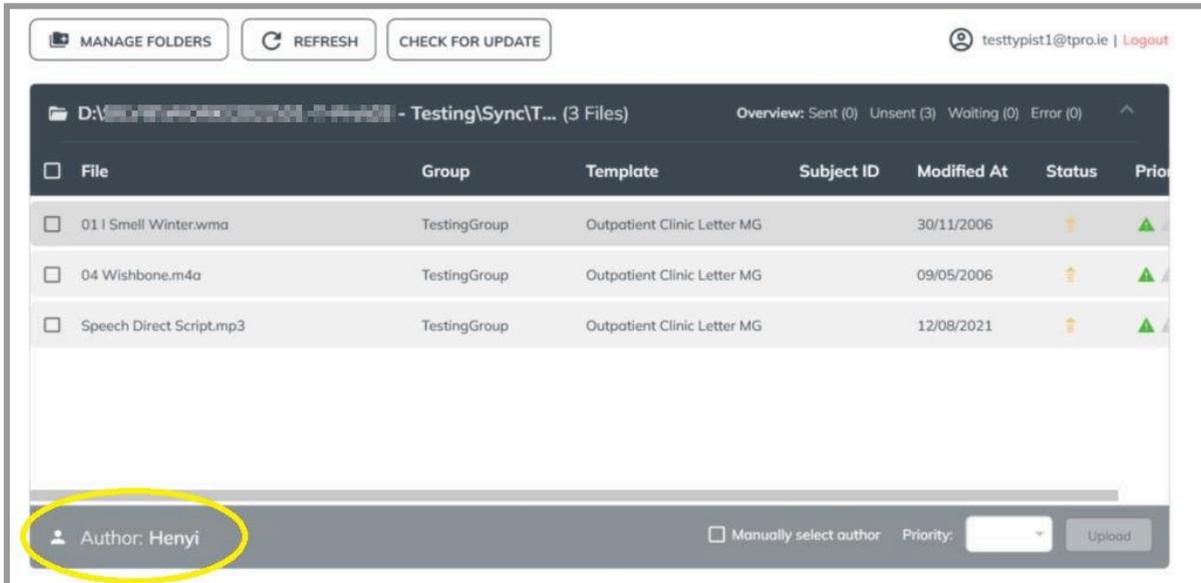
Click to open the dropdown list and select the relevant author

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Select and confirm the author

The folder with its contents will be displayed.
The default author of this folder is shown at the bottom.



Workspace displaying the folder content and default author

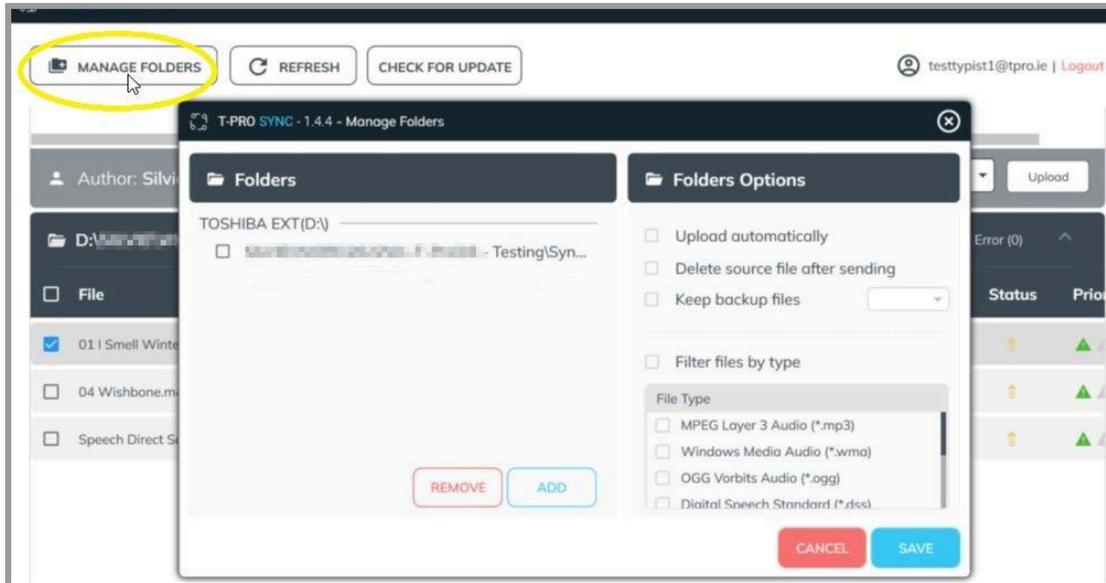
Additional folders

After the first time setup you can add more folders via the MANAGE FOLDERS button. Each time you will have to link a default author to your new folder.

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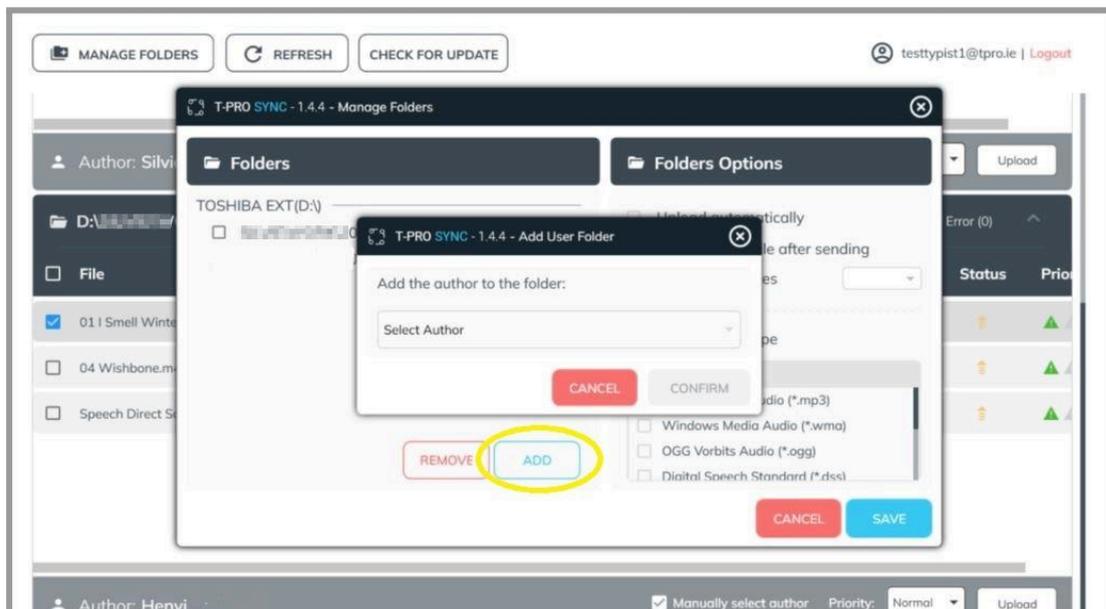
Follow the steps below (which are similar to the above):

1. Click on MANAGE FOLDERS. A new window opens..



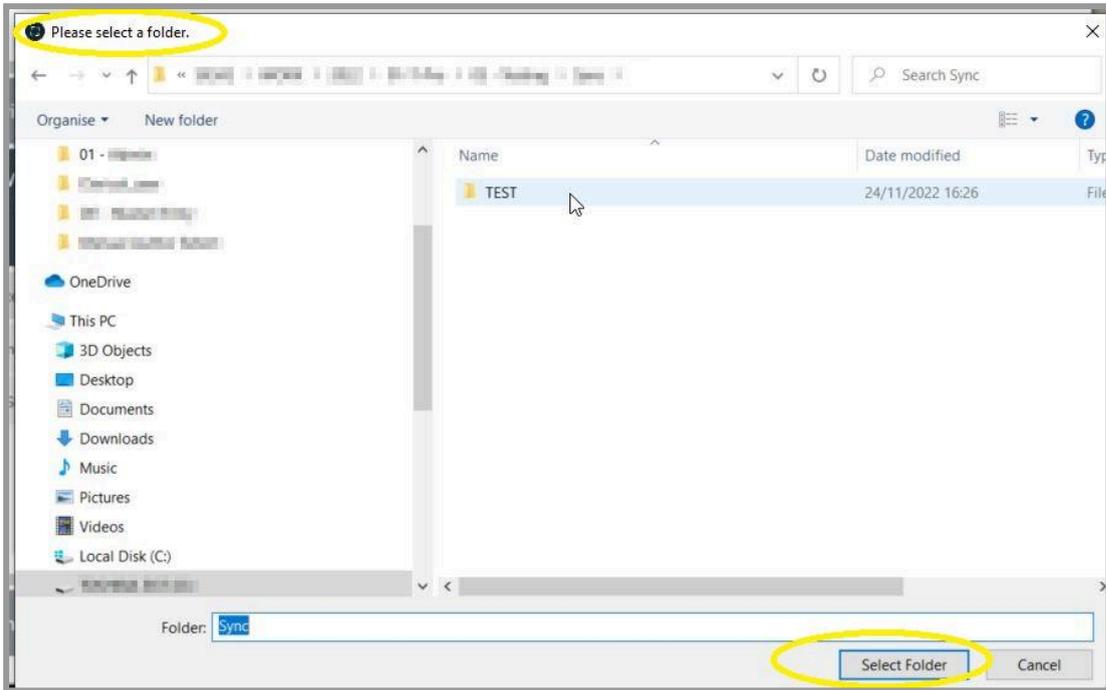
Folders and Folders Options window

2. Click on ADD. The *Add User Folder* window opens.



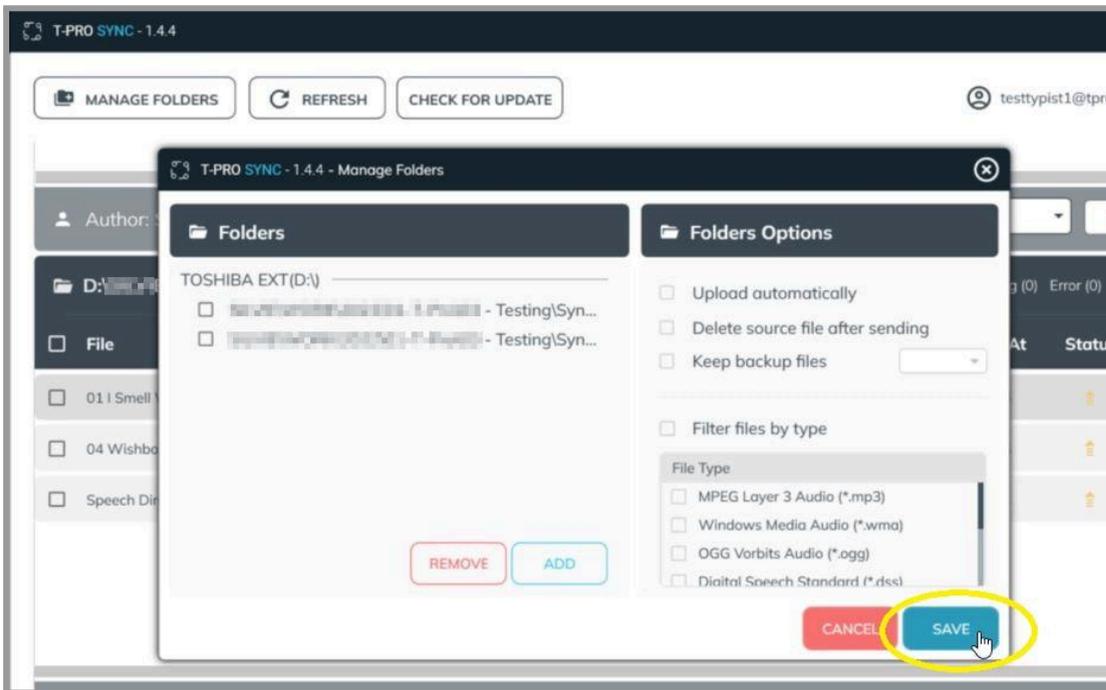
3. Select the relevant author from the dropdown list and CONFIRM.
4. Next, your PC's explorer opens where you need to navigate to the folder location and select the folder.

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Sample of explorer to select a new folder

5. Back in the folder section click on SAVE to complete the process.



Sample of saving an additional folder

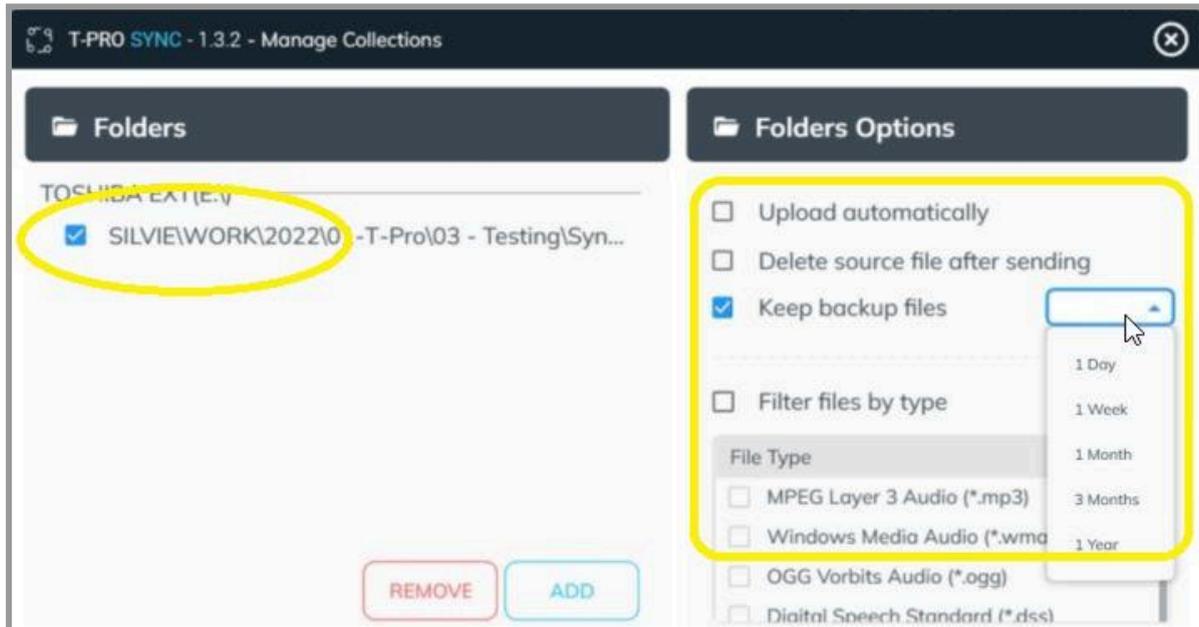
You can repeat this process to create an individual folder for each of your authors.

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Folder Options

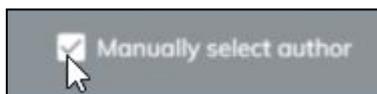
First select the relevant folder on the left side to enable the folder options (on the right).

- Automatic upload of files within the selected folder - checking for and uploading new audio files every 15 seconds
- Deletion of the source file after upload
- Keeping backup files for the selected duration



Manage folders menu

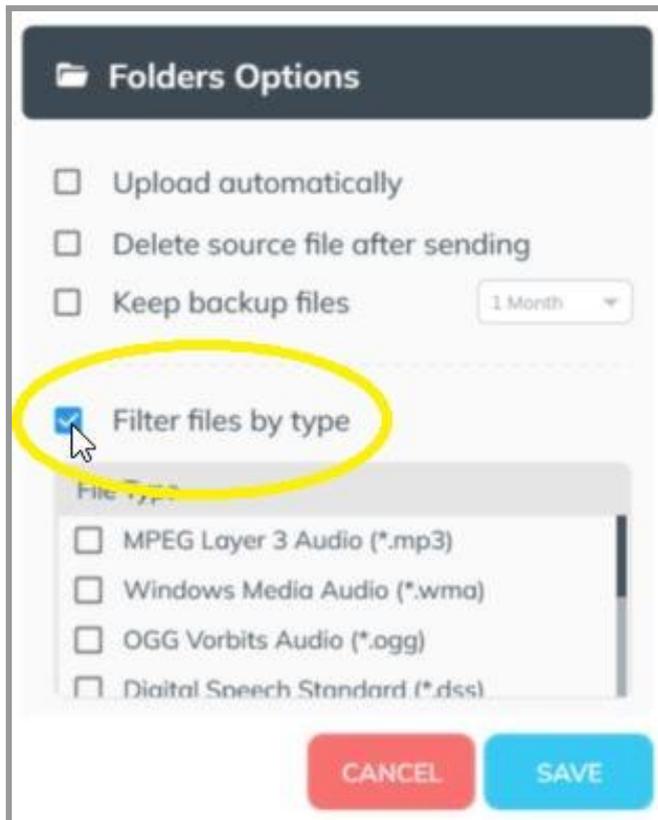
NOTE: When the folder is set to *Upload automatically* in combination with the [Manually select author](#) option, a request to select and confirm the author comes up at every automatic upload. To avoid this just uncheck the box.



File Type

Activate the option to filter files by type. Only the selected file types will then be displayed in the upload list (see screenshot [main workspace](#)).

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File type selection filter

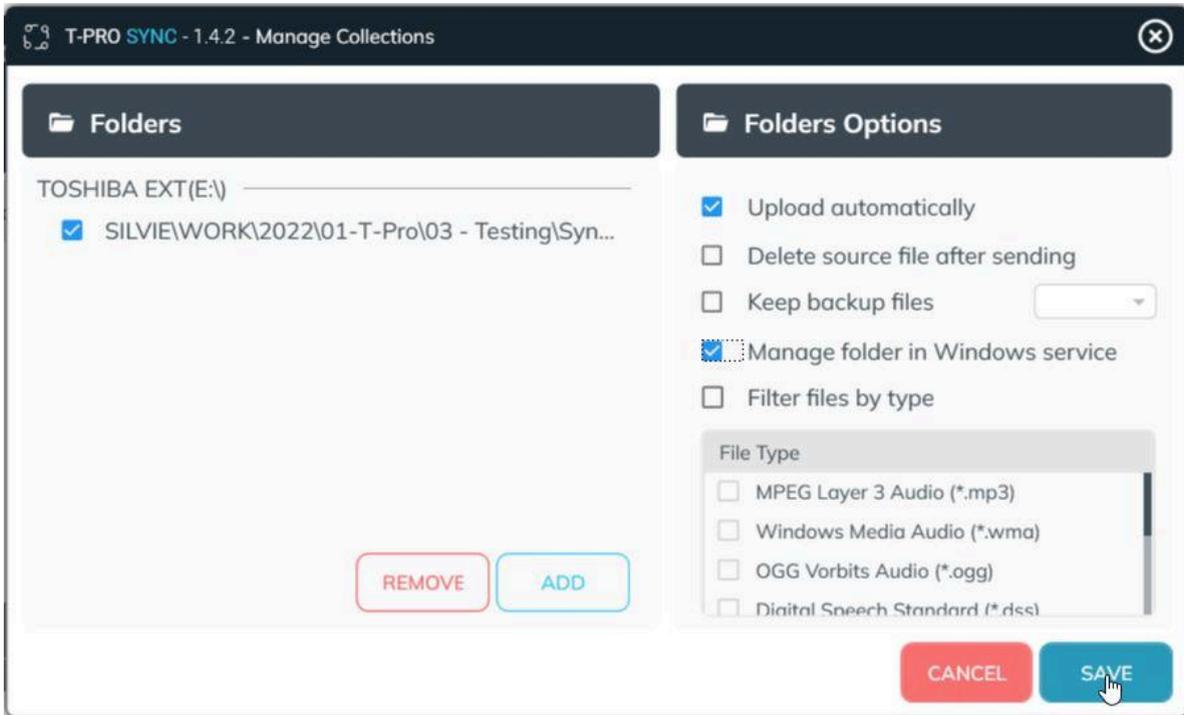
Tick the box for the files you want to include for the upload.

Click the button to **SAVE** your settings.

Windows Service Settings

If you want to set up T-Pro Sync to work as a Windows Service the options **Upload automatically** and **Manage folder in Windows service** both have to be enabled.

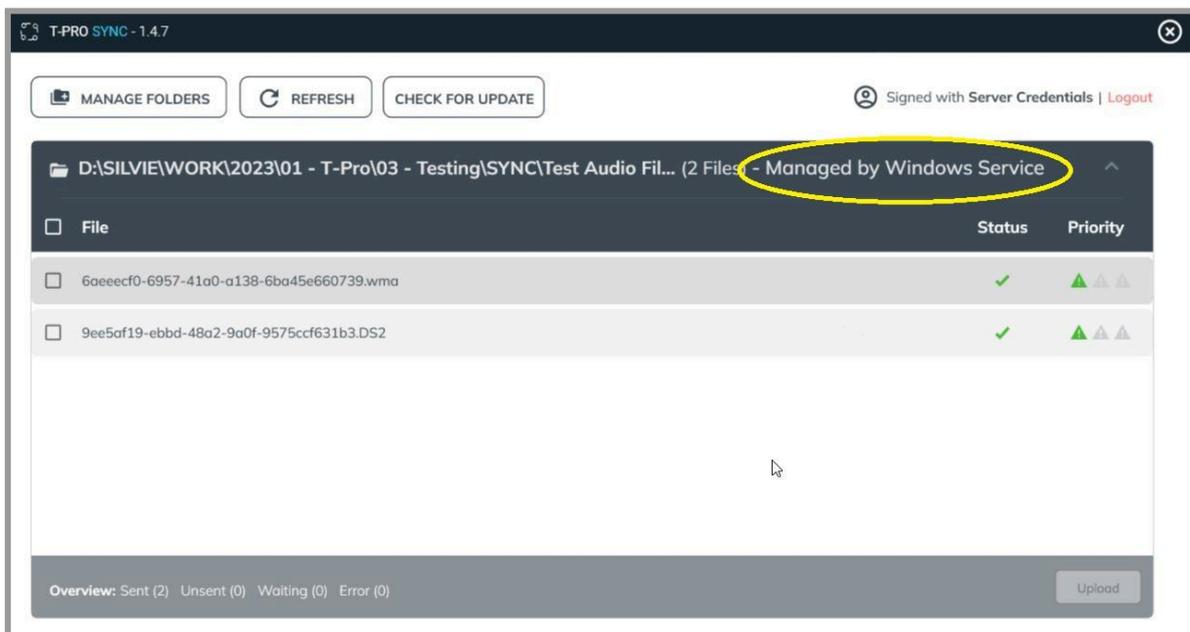
Getting Started with T-Pro Sync



Sample settings for Windows service upload

Click on SAVE.

=> In the main window you can see that the folder is managed by Windows Service.



Folder managed by Windows Service

Getting Started with T-Pro Sync

5.2.2 Folder view

The workspace lists the folder content as individual audio files.

- Information such as Group and Template originate from the author's default user settings.
- There are three status icons:
Orange = Awaiting upload
Blue = processing upload
Green = Uploaded



If you work with several folders, open and close them with the small arrow icon to the right.



Open and close the folders

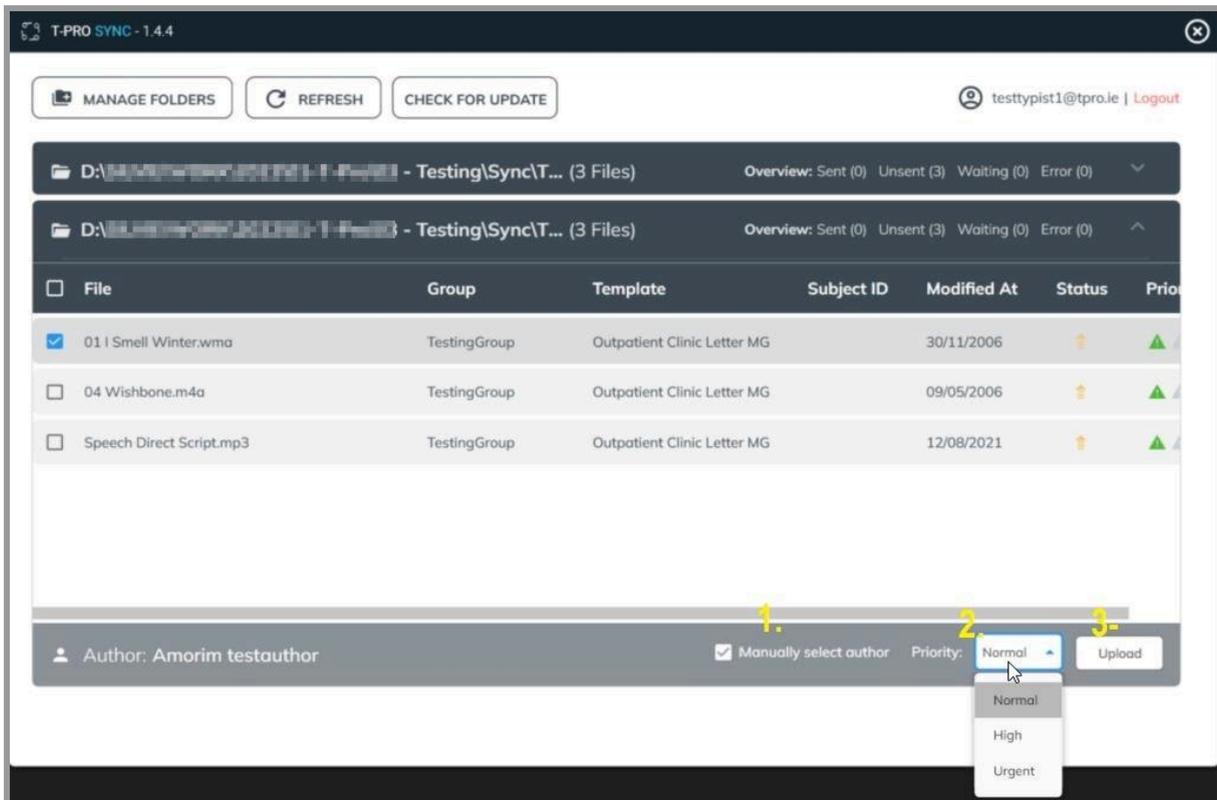
Tick the files you want to upload individually or tick *File* in the table header for bulk upload.



Tick the box at the top to upload the entire folder content

For selected files the following options get available:

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Options at the bottom of the folder

1. Manually select author
2. Set / change the priority
3. Upload the selected file(s)

5.2.3 Manually select an author

Tick this option if you have files for upload which are from a different author than the one set as default.

A typical scenario is if you load audio files from external devices of different authors into the same folder. Follow the steps below:

1. Tick the option *Manually select author*.

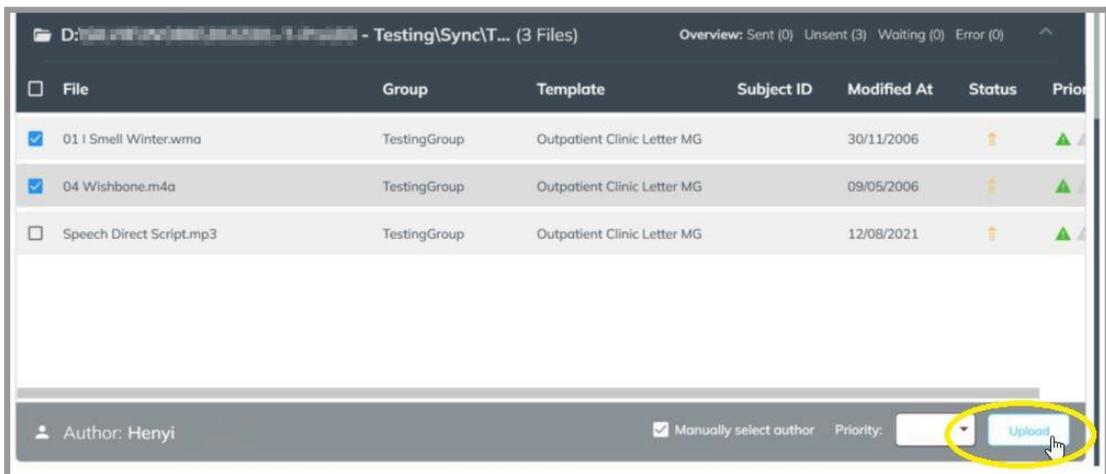
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2. Select the relevant file(s).



Two files selected

3. Click on **Upload**.



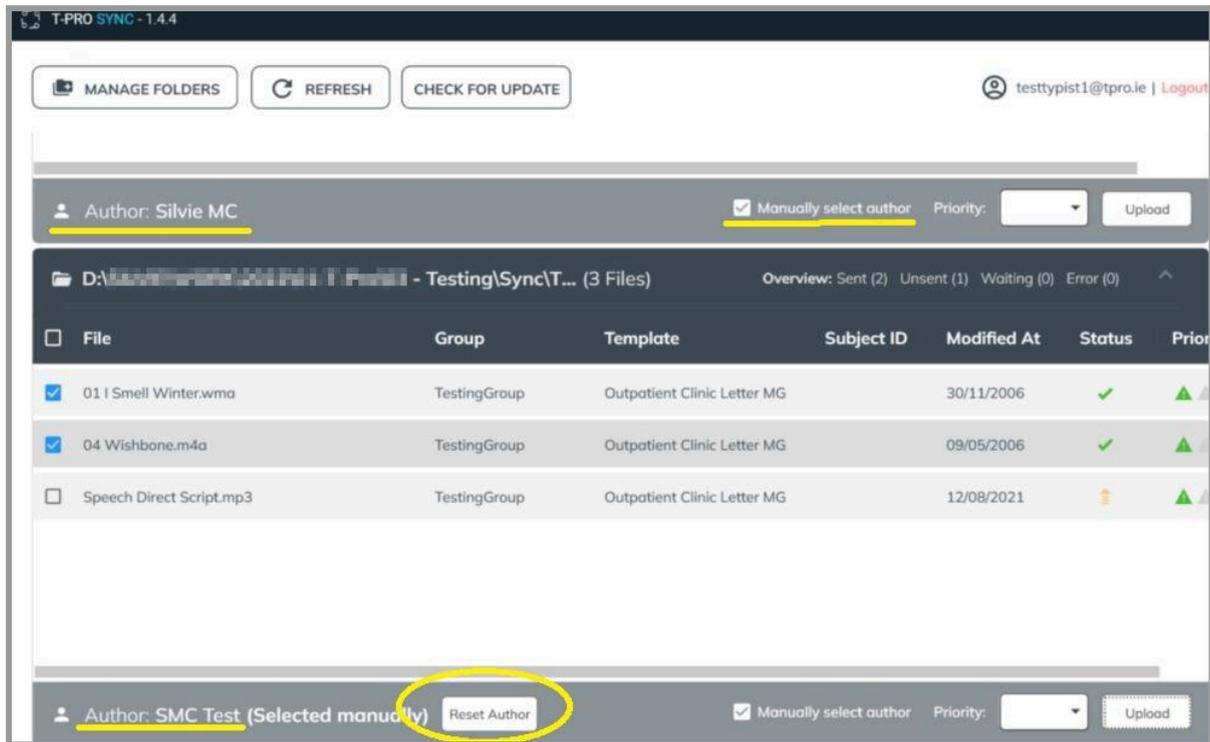
The selected files do not belong to the default author

4. The window to select an author opens.
5. Select the relevant author and CONFIRM.

=> The selected files will be uploaded under the name of the manually selected author. This is clearly displayed in the folder view.

You can easily reset back to the default author using the button at the bottom of the folder.

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File upload for a different author

NOTE: When a folder is set to automatically upload files ([Folders Options](#)), T-Pro Sync will ask to select an author on each automatic upload when the *Manually select author* option is activated.

5.3 MANAGE FOLDERS

Click on the button MANAGE FOLDERS to set additional folder options. Please [click here](#) to view the details.

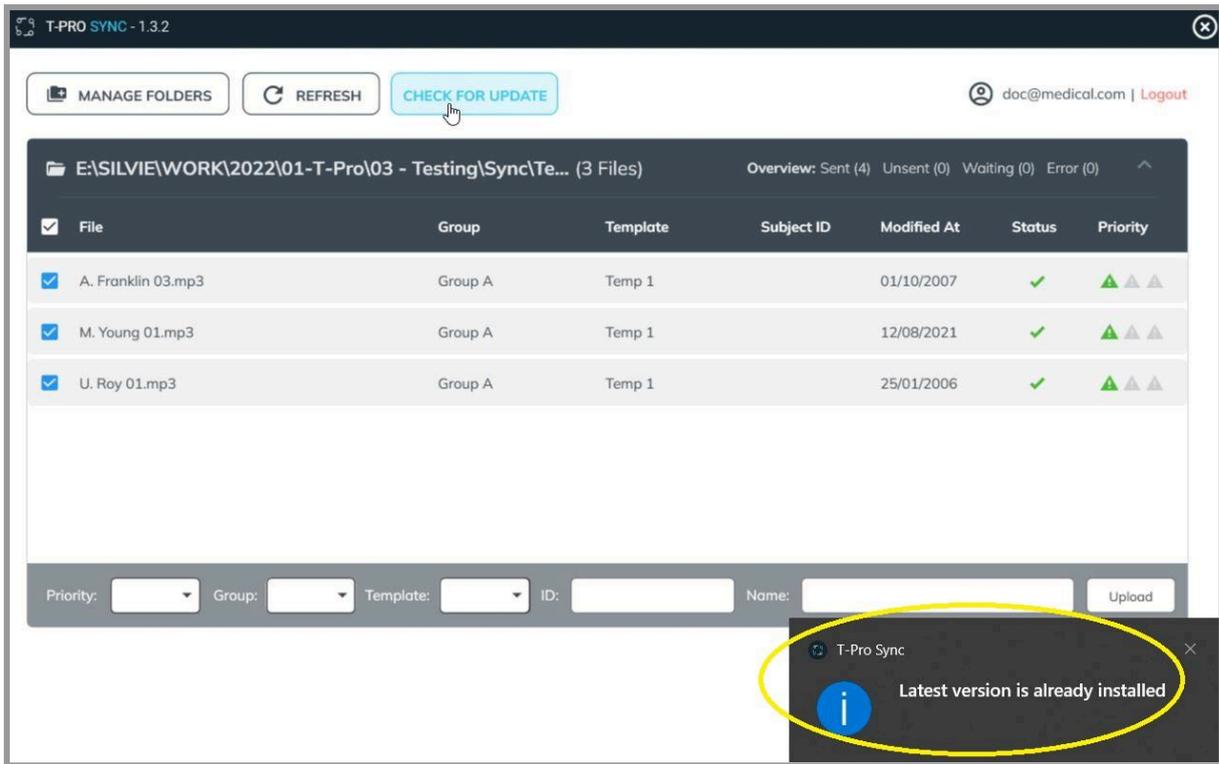
5.4 REFRESH

Use the button to synchronise your local folder with the upload list. Newly added audio files of your local folder will be added to T-Pro Sync.

5.5 CHECK FOR UPDATE

Use this button to see if there is an update available for the application.

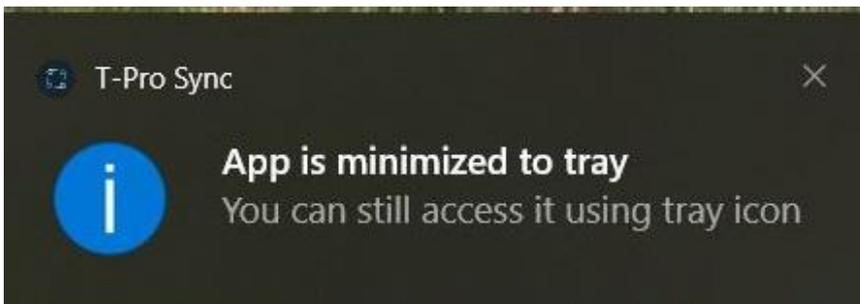
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Check for updates

6. Closing the Application

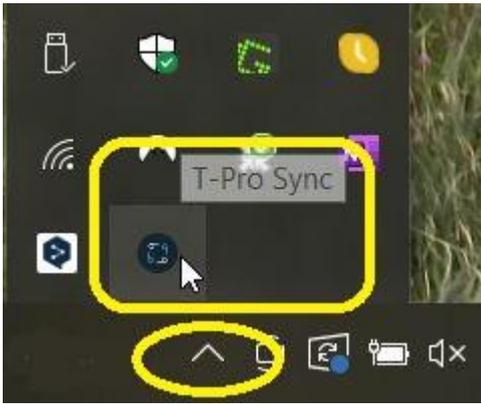
Use the x in the right corner to close the T-Pro Sync window.



=> The application is minimised and can be opened via the system tray at any time.

To access the tray click on the arrow in the Windows taskbar.

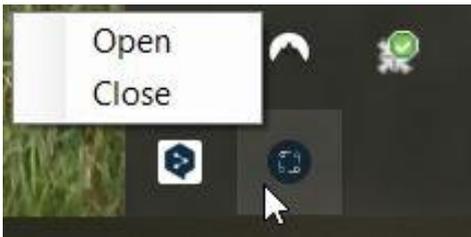
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Access the tray

A single click on the T-Pro Sync icon opens the application again.

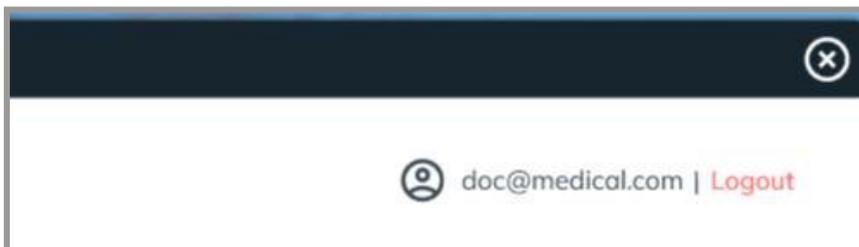
If you right-click on the icon in the tray you can close the application, e.g. remove from the tray.



Select Close

Logging out

If you want to logout of the program just click on the option next to your user name.



Logout brings you back to the login screen

- You will be returned to the login screen.
- The application will still be available via the tray.

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