

# Creating a Job

Let's create our first job:

- From the **Dashboard**, you can click the blue **Create New Booking** button from the top of the screen, or
- Navigate to the **'Home'** menu and select **'Create New'** under the **Bookings** section, or **Create New** under the **Jobs** section

A **Booking** is an umbrella reference for multiple, related **Jobs** and we will cover this in more detail in the related jobs sections, however, when creating brand new **Jobs**, you can select either **'Booking'** or **'Job'**, thereafter, an individual is usually referred to as a **'Job'** and a collection of **Jobs** is referred to as a **'Booking'**

The screenshot shows a software dashboard for an agency. At the top, there are navigation tabs: Home, Manage, Reports, Accounts, and Admin. On the right, there is a 'Job #' field and a user profile for 'dolores\_agency'. Below the navigation, there are several buttons: 'Create New Booking' (highlighted with a red circle), 'Create New Contact', 'Create New Customer', and 'Create New Consumer'. On the left, there is a sidebar menu with 'BOOKINGS' and 'JOBS' sections, both containing 'Create New' and 'Manage' options (the 'Create New' options are also highlighted with red circles). The main content area shows a 'Fill Rate (-2/+2 Weeks)' chart with three bars for 'Thu (May 14)', 'Fri (May 22)', and 'Fri (May 29)'. The chart shows 'Filled' (blue), 'Cancelled' (red), and 'Unfilled' (orange) jobs. The 'Thu (May 14)' bar is 100% filled. The 'Fri (May 22)' bar is 50% filled and 50% cancelled. The 'Fri (May 29)' bar is 100% unfilled.

## Job Details tab

### Customer Information

- You can start typing in the **Customer** or the **Client** name or use the dropdown arrows to make a selection; if you select the **Customer** first, the **Client** dropdown list will consist only of associated **Clients**. If you select the **Client** name first, the corresponding **Customer** will automatically prepopulate
- Start typing or select a **Requestor** - only the corresponding **Customer's Requestors** will be listed - to create a new **Requestor**, click on the pencil icon
- If an email address is stored for the **Requestor**, this will automatically populate the **Notification Email** field; if you wish for any additional parties to receive emails on this **Job** you can also enter a comma separated list here
- The **Exclude from Auto Offer** box can be checked if your agency is using the **Auto Offer** process and you wish to exclude this job from the **Auto Offer** process
- If you have **Offer Pool** enabled, but would like to exclude this job, you can mark **Exclude from Job Offer Pool** checkbox (more info in the Admin & Configuration section of documentation)

Home Manage Reports Accounts Admin Job # dolores\_agency

Job Details Assignments Finance Notifications Recurring Audit History

Booking # - Customer Information Status: **NEW**

Client\* Patient Services x v [edit]

Requested By\* Lisa Johnson (1234567890) x v [edit]

Notification Email\* lisajohnson@gmail.com

Customer\* San Francisco General Hospital x v [edit]

Bill To\* San Francisco General Hospital x v [edit]

Customer Notes

Notification Email Enabled  Exclude from Auto Offer  Exclude from Job Offer Pool

Add additional (comma separated) email notification recipients

Note that for all data required in the Customer section, you can edit this data on-the-fly by selecting the edit/pencil icon - you can edit the existing profile or you can create new profiles by selecting the blue 'Create New' button in the edit dialog box which will subsequently save to the Customer, Client, Requestor etc. database as appropriate..

### Edit Existing Client

**Warning!** You are editing an existing client. This will update **all bookings** that are already associated with this client. If you want to enter a new client, click on the **Create New** button below and enter the new client information.

Name\* Patient Services Active?

Accounting Reference

Contact Person Vera Wang

Contact Phone 555-321-698

Contact Email vera@hotmail.com

Notes

**Save Client** **Create New** Close

### Service Information

Select a **Service Type**.

Select a location - note that this is the **Service Location** as associated with the

**Customer/Client** in the **Customer** profile creation i.e. where the job/service will take place.

All other information in this section, including the **Special Instructions** is pre-populated from the **Customer** profile and can be viewed and/or edited.

Note that for any Remote **Service Type**, e.g. Video (Scheduled), **Service Location** Information is not required.

### Appointment Details

Select the **Language**, **# Interpreters Requested** (default 1, Max 50), a **Preferred Interpreter** if required (note that if Preferred Interpreters were added to a **Consumer** profile, these will be loaded here), a **Consumer/More Consumers** and **Interpreter Gender Required** if relevant. If any **Reference** fields have been set on the **Company/Customer Configuration** (more info in the Admin & Configuration section of documentation) these will appear on the booking form but otherwise can be added on-the-fly.

Similarly, **Additional Requirements** may have been set on the **Company/Customer Configuration** and can also be added here but can only be selected from a list that will also be configured at Company level.

In the **Appointment Details** Notes you can add all of the details about the nature of the appointment that may be vital to either a scheduler or an **Interpreter**.

### Calendar

Select the **Expected Start Date** of the appointment, this is the date in the future that the job will take place, enter the **Expected Start Time**.

The **Use Interpreter Shifts** option can be enabled when there are multiple Interpreters on the job and they will split the job into shifts, this will be covered in more detail later in the training.

Enter the **Duration Hours** for the appointment - you must enter both the hours and minutes even if one of the values is zero.

The **Time Zone** will default to that configured for the agency, or **Customer** if different, however this can be changed here also.

The **Booking Date** and **Booking Time** is stamped with the date/time that the booking was created, however this can be updated to reflect when the request was actually received which will be important in the case of **Rush** and/or **Cancellation Fees** when financing the job.

The screenshot shows a 'Calendar' booking form with the following fields and callouts:

- Expected Start Date:** 25/05/20 (circled in red). Callout: Select planned date/time of appointment.
- Expected Start Time:** 11:00 (circled in red). Callout: Select planned date/time of appointment.
- Duration Hours:** 2 (circled in red). Callout: Must select hours and minutes even if one value is zero.
- Minutes:** 30 (circled in red). Callout: Must select hours and minutes even if one value is zero.
- Time Zone:** GMT+00:00 Europe/London BST - British Summer Time (circled in red). Callout: Agency/Customer Time Zone, change if required.
- Booking Date:** 22/05/20 (circled in red). Callout: Time stamped with original Job creation, can update to reflect date/time request received.
- Booking Time:** 11:01 (circled in red). Callout: Time stamped with original Job creation, can update to reflect date/time request received.

## Notes

You can add any **Notes** that are relevant to the **Job**, only the **Job Details** section will be seen by all parties to the job, the **Billing Notes** and **Notes about Interpreter(s)** will be visible internally (agency) only.

Finally, use the blue **Save** button on the bottom right of the booking form and you have then successfully created your first **II Job!**

The screenshot shows the 'Notes' section with three text editors:

- Job Details:** All eyes. Includes a rich text editor toolbar with options for Font Family, Font Size, Bold, Italic, Underline, and ABC.
- Billing Notes:** Agency eyes only. Includes a rich text editor toolbar with options for Font Family, Font Size, Bold, Italic, Underline, and ABC.
- Notes about Interpreter(s):** Agency eyes only. Includes a rich text editor toolbar with options for Font Family, Font Size, Bold, Italic, Underline, and ABC.

A blue **Save** button is circled in red at the bottom right of the form.

## Manage Jobs

To view, edit or take any actions on the **Job** you can Navigate to the **'Home'** menu and select **'Manage Jobs'** - note how any **Jobs** that have just been created are in **Open** status and each status within **II (Open, Offered, Assigned, Closed** etc.) is colour coded.

From **'Manage Jobs'** you can:

- Filter **Jobs** by typing a value at the top of any column or using the drop down menus where present
- Use the **Filter** function to select a certain date, date range, or list of predefined periods such as **Next 7 days**
- Use the **Custom Filters** function to build and save a host of custom filters based on any parameters within a booking such as **Job Status, Language, Customer, Consumer, Dates** etc.
- **Reset Columns** to add to or change the columns that are currently presented
- Avail of reporting functions by using the **Export** button at the bottom of the page - note that when you use the **Export** function you will receive a pop up dialog allowing you to select the data required; checking **All jobs (with current filters applied)** in advance will refine the export by any filters that have been applied

- Navigate to the additional tabs within **Manage Jobs** for more refined data such as **New Jobs** only
- Select the drop down menu on any **Job** to take a host of actions which we will cover in the remaining sections of this module

Quick tip: a link to **'Manage Jobs'** can also be found in the **Quick Links** section of your default home page - the **Dashboard**.

The screenshot shows the 'Manage Jobs' interface. At the top, there are navigation tabs: 'New Jobs', 'Offers (>24 Hrs)', and 'Unconfirmed (>24 Hrs)'. A callout points to these tabs with the text 'Additional tabs for more refined data'. Below the tabs, there are filters for 'Demo Agency: All Jobs' and a 'Query Applied' section. A callout points to the filter area with the text 'Advanced and custom filters'. The main table has columns: ID, Date, Time, Customer, Location, Lng., Language, Stat., Interpreter, Team Size, Reference, Requirement, Type, and Bkg. Tm. A callout points to the 'Stat.' column header with the text 'Type in column headers or use drop down menus to filter data'. A callout points to the 'Op' dropdown menu in the 'Stat.' column with the text 'Select the drop down menu on the job to take various actions'. A callout points to the 'Reset Columns' button with the text 'Change or add to the data/columns that are presented'. A callout points to the job ID '515535' with the text 'View More', 'View (in full)', and 'Edit (in full)'. A callout points to the 'Assign Interpreter', 'Unassign Interpreter', and 'View Offers' actions with the text 'Assign Interpreter', 'Unassign Interpreter', and 'View Offers'. A callout points to the 'Open / Re-Open Job', 'Confirm Interpreter', and 'Confirm w/ Requestor' actions with the text 'Open / Re-Open Job', 'Confirm Interpreter', and 'Confirm w/ Requestor'. A callout points to the 'Send Ad Hoc Email', 'Send New Job Email', 'Send Job Status Update Email', and 'Send Customer Confirmation' actions with the text 'Send Ad Hoc Email', 'Send New Job Email', 'Send Job Status Update Email', and 'Send Customer Confirmation'. The footer contains the copyright notice '© 2012 - 2019 InterpreterIntelligence. All rights reserved.' and the version 'Version 3.80'.