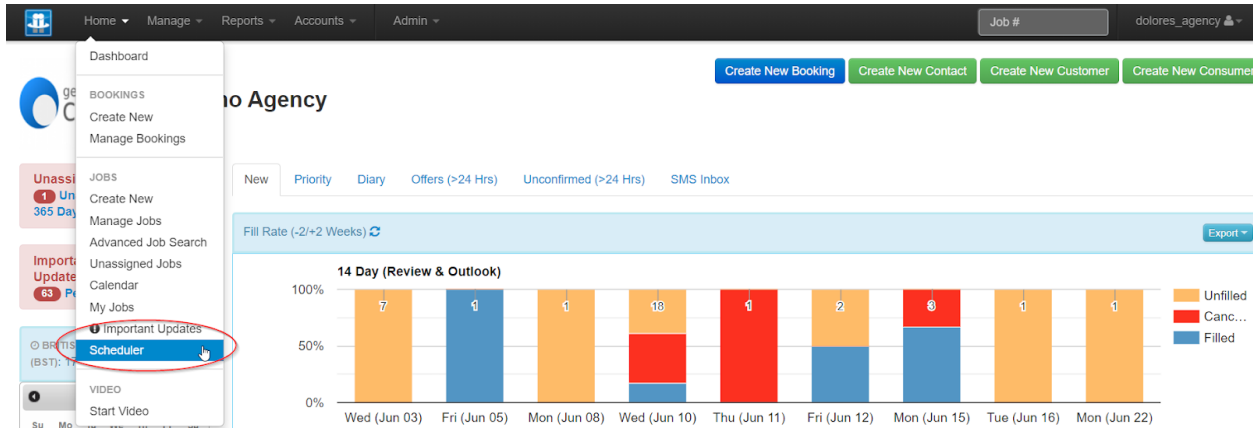


# Scheduler

When you are familiar with manually **Offering** and **Assigning Jobs** you could then use the **Scheduler** tool which is a convenient and efficient way to **Offer** and **Assign** multiple **Jobs** from a single interface.

To access the **Scheduler** simply click on the **'Home'** menu and select **'Scheduler'**.

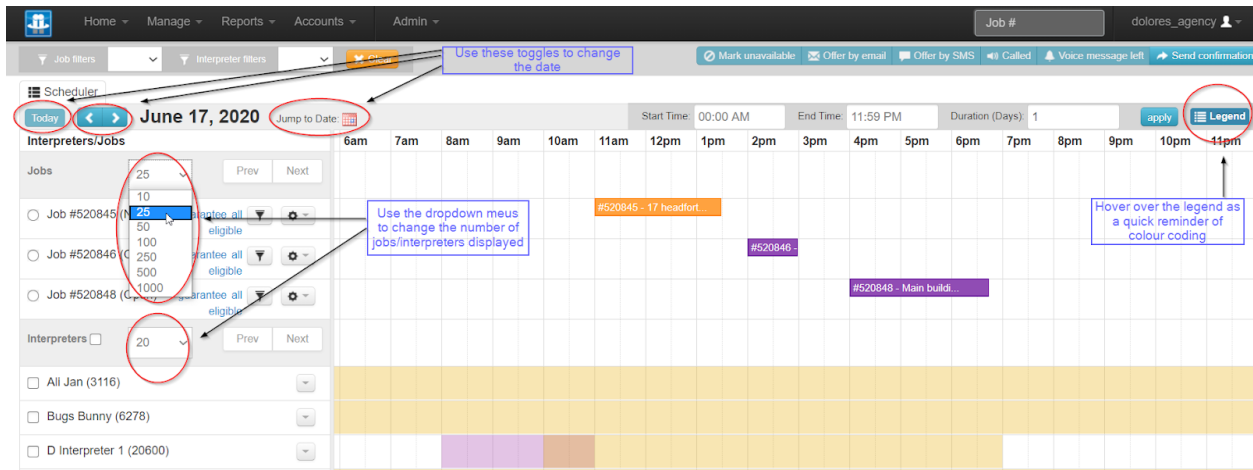


The **Scheduler** view will default to today's date but you can use the toggle buttons at the top left hand side to move the day forward/backward or the **Jump to date** calendar to select a specific date.

This interface will display **Open & Offered Jobs** only, i.e. **Jobs** that need to be actioned (**Offered** and/or **Assigned**). Note also that a default number of **Jobs** and **Interpreters** will be displayed but you can change this number using the drop down menus. The list of **Interpreters** by default is not filtered (unlike the default view on the **Assign Interpreter** page within a **Job**), i.e. all **Interpreters** can be displayed.

The **Jobs** calendar pane (top section) will give you a graphic representation of the **Job** duration and you can hover over any **Job** to see a complete summary.

The **Interpreter** pane of the calendar (bottom section) will display the **Interpreter's Availability**, as set on their profile, along with any **Assignments** for that day - white indicates that an **Interpreter** is **Unavailable**, pink represents **Available** and **Assignments** will be represented by the colour of the **Job Status**, for example **Green** indicates a **Confirmed Job**. You can hover over the legend as a reminder of the colour coding used for **Job Status** and **Interpreter Availability**.



You can further refine the **Jobs** and **Interpreters** listed on this page by using the **Job Filters** and **Interpreter filters** at the top of the page. For example you may wish to **Offer/Assign Jobs** on a per **Customer** basis.

### Job Filters

- Select the **Job Filters** button
- In the **Query builder** pop up box click **Add condition**, select **Customer** from the field menu (for example) choose **Equals** or **Contains** from the operation menu and type in the **Customer** name
- You can filter for many different parameters within one search by continuing to **Add condition** within the **Query builder** dialog box
- To save the search for future use, enter a **search name** and click **Save** - these can be accessed in the future using the **Saved searches** tab
- Click **Search** to execute the filter immediately
- The **Jobs** pane will be updated to display **Jobs** only for the **Customer** specified in the search filter and any other parameters defined by the filter
- You can use the **Clear** button at any time to clear the applied filter(s)

## Query builder

1. Click 'Add Condition'  
2. Select from the menus and type the variable as appropriate.  
3. To save the search for the future, type a name for the saved search and click 'Save'.  
4. Click Search.  
5. Saved searches can be accessed in the future using the 'Saved searches' tab.

Search **Saved searches**

Customer SFGH **Save** **Clear**

And

Customer Equal(s) San Francisco General Hospital **Add condition** **Add group**

**Close** **Search**

## Interpreter filters

- Click on the radio button next to any **Job** in the **Jobs** pane
- Clicking the **eligible** button will filter for **Interpreters** that match the **Job** requirements i.e. this is the list of default interpreters you would normally find on the **Assign Interpreter** page within a **Job** (see Offering & Assigning Jobs)
- Use the cog wheel at any time to view the usual **Job** action menu i.e. **Edit, Assign Interpreter, Close, Cancel** etc.

Home - Manage - Reports - Accounts - Admin - Job # dolores\_agency

Job filters Interpreter filters **Clear** Mark unavailable Offer by email Offer by SMS Called Voice message left Send confirmation

Scheduler Today June 17, 2020 Jump to Date: Start Time: 00:00 AM End Time: 11:59 PM Duration (Days): 1 apply Legend

Interpreters/Jobs 6am 7am 8am 9am 10am 11am 12pm 1pm 2pm 3pm 4pm 5pm 6pm 7pm 8pm 9pm 10pm 11pm

Jobs 25 Prev Next

- Job #520845 (New) guarantee all **eligible** **filter** #520845 - 17 headfort
- Job #520846 (Open) guarantee all eligible #520846
- Job #520848 (Open) guarantee all eligible #520848 - Main buildg...

Interpreters 20 Prev Next

D Interpreter 1 (20600)

- Clicking on the **filter** icon next to the **Job** will provide the **Job** and **Booking** filters that you will also find on the **Assign Interpreter** page within a **Job** i.e. if few or no eligible **Interpreters** are available you can then toggle requirements such as **Proximity Search** etc.
- At any time you can click the **All** link next to the **Job** to remove any filters and to offer to **Interpreters** regardless of eligibility
- You can also use the **Interpreter filters** at the top of the page to further refine/filter for **Interpreters** just as we did above in **Jobs filters**, for example if the **Language**

requirement on the job is Spanish, you may decide to filter for all Spanish Interpreters and offer on that basis or to filter for only the top rated **Interpreters**

When you have filtered for the appropriate **Interpreters**

- Select all in the list by using the check box at the top of the **Interpreter** list
- Or select **Interpreters** individually using the checkbox next to their name
- Use the **Offer** buttons on the top right hand side to **Offer by email** or **Offer by SMS**
- The resulting pop up box is the same as you will see when making **Offers** from the **Assign Interpreter** page, make sure to click the blue **Notify Interpreters** button

To View **Job Offers** and responses use the cog wheel next to the **Job** and select **View Offers**. You can also view **Offers** and responses at the **Interpreters** level by using the drop down next to any individual **Interpreter**. You can then **Assign** an **Interpreter** by also clicking the drop down next to any individual.

As you proceed with **Job Offers** and **Assignments**, note how the **Scheduler** view will change, i.e. **Assigned Jobs** will no longer appear in the **Jobs** pane but will appear as an Assignment in the **Interpreter** pane within the **Assigned Interpreter's** calendar.

To recap, the **Scheduler** interface provides a lot of efficiency in terms of **Offering** and **Assigning Jobs** from a single location as well as more efficiency and flexibility in terms of filtering and **Offering** to **Interpreters**.

- ★ **Use the eligible filter to:** show only the **Interpreters** that match the **Job** requirements, i.e. the list of interpreters that you would normally see by default on the **Assign Interpreter** page
- ★ **Use the filter icon next to a job to:** refine the eligible **Interpreters** based on the system/job/booking filters e.g. switch off or increase **Proximity Search**, remove a **Preferred Interpreter** or an **Interpreter Gender Required**, remove a **Booking Requirement** etc.
- ★ **Use the all filter to:** show all **Interpreters** in your database regardless of eligibility for the **Job**

- ★ **Use the Interpreter filters to:** apply more sophisticated filters such as **Region, Country of origin, Experience** or a combination of many variables, either to the **all** or **eligible** filters.