User Management in Interpreter Intelligence

Internal User (agency staff)

1. Navigate to Admin>User Management
2. Click on NEW USER
3. Enter user details
4. Select INTERNAL as user type
5. Select permissions appropriate to user
    - Admin – full permissions
    - Financial – can conduct financial review, invoicing and remittances, no access to rate plans
    - Interpreter Manager – full access to scheduling features only
    - Close jobs – optional
    - Read reports – optional
6. Click SAVE

Requestor (Customer)

1. Navigate to Manage>Create New Requestor
2. Click on NEW REQUESTOR
3. Enter user details
4. Click SAVE
5. ADD ASSOCIATIONS
    - Enter the Customer the Requestor is associated with
    - Enter the Client the Requestor is associated with, if applicable
    - Enter the Service Location the Requestor is associated with, if applicable
    - Click Save icon to right of fields
    - Repeat steps for all Customers/Clients/Service Locations
    - Click SAVE
6. Navigate to Admin>User Management
7. Select Requestor user ID from the list on the left
8. Confirm User Type is CUSTOMER
9. Select CONFIGURATION permissions appropriate to user
    - Customer Financial – can view financials related to jobs associated with user account
    - Can Read Reports – can view reports related to jobs associated with user account
    - Can Close Jobs – can close jobs associated with user account (not typically used for Customer profile)

- Compliance Auditor – contact support@interpreterintelligence.com for more information
- View Organizations - contact support@interpreterintelligence.com for more information

10. Click Save

Interpreter

1. Navigate to Manage>New Contact
2. Enter & Save new contact profile (for instructions, click here, for video click here)
3. Navigate to Admin>User Management
4. Click NEW USER
5. Enter user information
6. Under User Type select INTERPRETER
7. Under Configuration, type name of Interpreter into blank field to match profile with User Account
8. Select Configuration options
    - Interpreter Financial – allows access to payments in paid and pending status
    - Can Read Reports – allows access to reports related to only interpreter's job history
    - Can Close Jobs* – allows interpreter to close jobs and add incidentals as applicable
9. Click Account Enabled and follow agency procedure for sharing new User Accounts
10. Click SAVE

*Typical setting for interpreters is to allow Closing Jobs

For detailed documentation, please see User Management training materials using this link.

For video demonstration of the User Management process, please use this link.