

GUIDE - ADDING JOURNAL NOTES

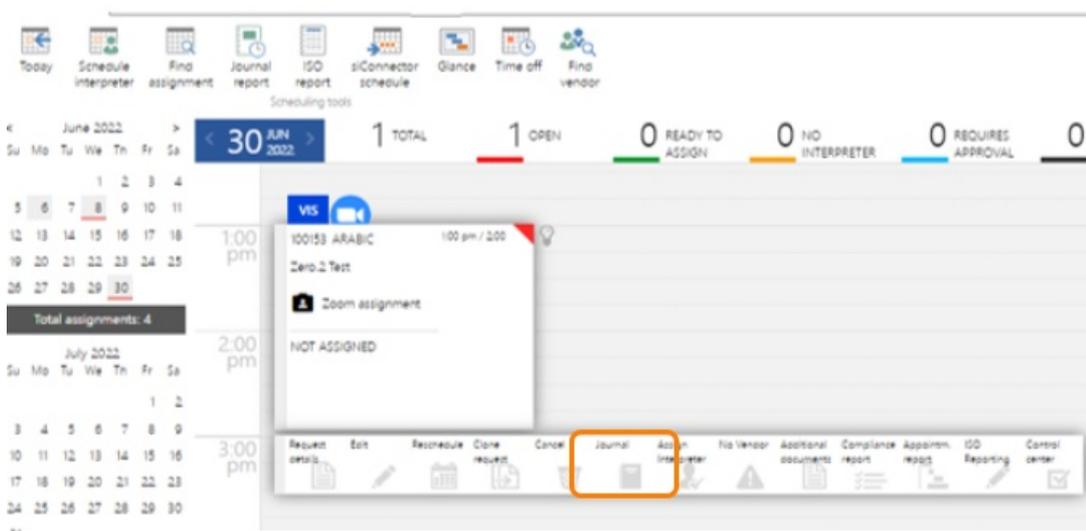
1. Open Calendar & Look for Assignment

Navigate to the assignment to which you wish to add notes.

The screenshot displays a software interface for scheduling. At the top, there are navigation tabs: SCHEDULE (selected), ACCOUNTING, TOOLS AND SETTINGS, and LOG OUT. Below these are icons for various tools: Today, Schedule interpreter, Find assignment, Journal report, ISO report, siConnector schedule, Glance, Time off, and Find vendor. A 'Scheduling tools' section is also visible. The main area shows a calendar for June 2022, with the 30th highlighted. To the right of the calendar, it indicates '1 TOTAL' and '1 OPEN' assignments. A pop-up window for the assignment '100153 ARABIC' is shown, with details: '1:00 pm / 2:00', 'Zero.2.Test', and a 'Zoom assignment' icon. Below the calendar, there are sections for 'Total assignments: 4' for June and 'Total assignments: 0' for July. At the bottom, there are dropdown menus for 'Month' (set to January) and 'Year', and a 'SHOW CALENDAR' button.

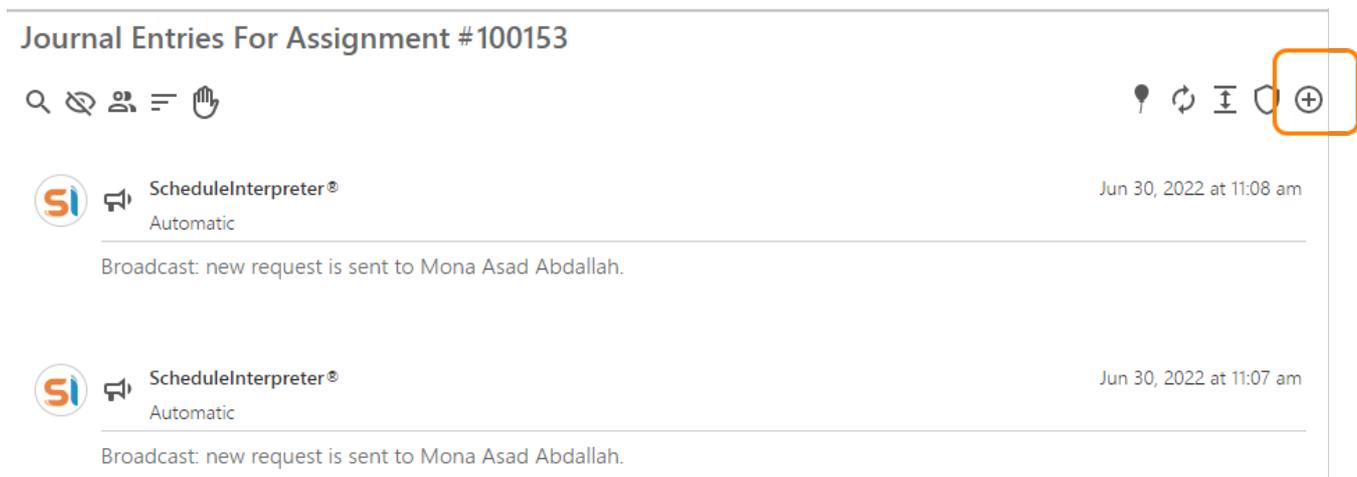
2. Select Journal

Hover over the assignment and select "Journal."



3. Click the + to add a new entry.

When you click the +, you will see a field where you can enter your entry.



3. Select if you want to share the update with vendor, requester, etc.

You may or may not want to share the journal notes. Use your best judgment.

Share with vendor Share with requester Include in invoice Include in reminder

3. Save your journal entry.

Click "save" to enter the journal entry in the system.



You can also easily access the Journal in the assignment Control Center, where you can see all the details related to the order/assignment. Below is an example. Click either the "Journal" button or the + sign to enter notes.

The screenshot shows the 'CONTROL CENTER :: ASSIGNMENT #100153' interface. On the left, a 'DETAILS' tab is active, displaying assignment information: MODALITY (VIS), SERVICE (Arabic), DATE AND TIME (June 30, 2022 at 1:00 PM), CUSTOMER (Zero.2 Test), BILL RATE (\$ 75.00), CONFERENCE PLATFORM (Zoom), LOCATION (1901 Avenue of the Stars, Suite 935, Los Angeles, CA 90067), DESCRIPTION (test), REQUESTER (Lourdes Galindo), SCHEDULED (June 30, 2022 at 10:14 AM), and VENDOR GENDER (Neutral). At the bottom of the details section, three buttons are visible: 'CANCEL ASSIGNMENT', 'JOURNAL' (highlighted with an orange box), and 'RESET COORDINATES'. On the right, a 'Journal Entries For Assignment #100153' panel is shown. It features a search icon, a list icon, a refresh icon, a location pin icon, and a plus sign icon (highlighted with an orange box). The journal entries list includes: 1. Gabriela Garcia (Continental Interpreting) on Feb 9, 2023 at 2:46 pm with the entry 'test journal entry'. 2. ScheduleInterpreter® (Automatic) on Jun 30, 2022 at 11:08 am with the entry 'Broadcast: new request is sent to Mona Asad Abdallah.'. 3. ScheduleInterpreter® (Automatic) on Jun 30, 2022 at 11:07 am with the entry 'Broadcast: new request is sent to Mona Asad Abdallah.'. 4. ScheduleInterpreter® (Automatic) on Jun 30, 2022 at 11:06 am with the entry 'Broadcast (custom) is sent to Mona Asad Abdallah.'.

🔄Revision #4

★Created Thu, Feb 9, 2023 10:30 PM by Gabriela Garcia

✎Updated Tue, Jul 25, 2023 5:14 PM by Gabriela Garcia