STAFF TRAINING AGENDA

Day 1 – 3 hours

Configure Company-Wide Settings

- Control center
- Document Designer
- Form Designer
- Data Export and Operations Status
- Report as Backup

Account Center

- Default Settings
- Adding New Accounts
  - Account vs Sub-Account vs Location
- Users
- OTS custom configuration
- Cancellation Policies

Day 2 – 3 hours

Vendor Center

- Default Settings
- Adding New Vendors
- W-2 vs 1099-MISC vs DBA
- Fine Tune Vendor Accounts
- Vendor rates

SiConnector

- Configuration
- Import

Day 3 – 3 hours

Schedule Appointments

- Calendar Views (Card vs Table)
- Color Coding
- Schedule
  - Schedule Interpreter Form Review
  - Regular
  - Rush/Emergency
  - No Broadcasts
  - Cloning
  - Recurring
- Managing Assignments and Assignment Control Center
- Complete/Submit
  - Paper Timesheet/VOS
    - Complete Appointment
    - Submit Paperwork
  - On the Spot!
    - Complete Appointment

    - Submission Process Review
- Find Appointment
- Incident Reporting
- Journal Report
- Appointment Status Quick List

Day 4 – 3 hours

Communication Center

- Schedule
- Accounting
- Maintenance
- Settings (Test Mode Recipient)

Reporting

- Preset Reports
    - Performance Report
        - Company
        - Clients
        - Interpreters
        - Languages
    - Summary Report
        - Global (Sub-Account data with Main Account)
        - Global Details (Sub-Account data listed individually)
        - Account (Sub-Account data with Main Account)
        - Account Details (Sub-Account data listed individually)
    - Operations Status Report
        - Settings
        - Revenue Tab

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