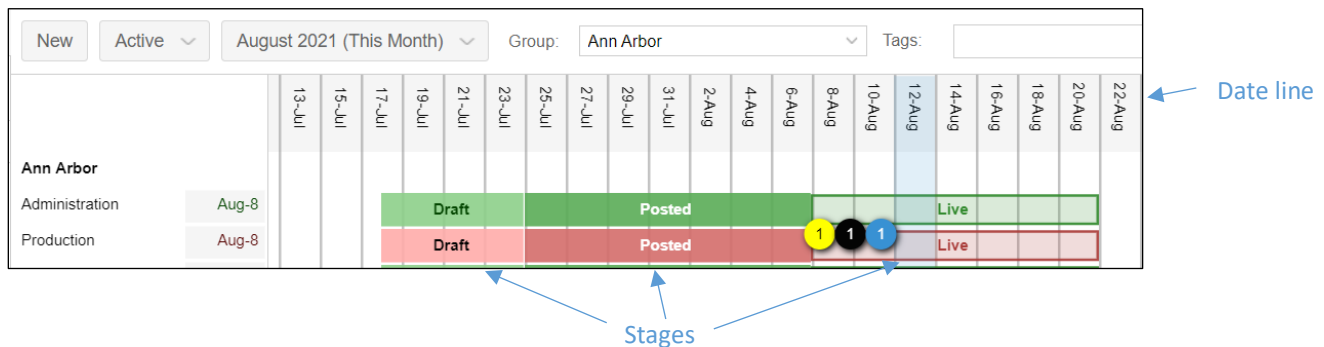


Visual Scheduling: Advancing Schedule Template Stages

Job Aid

Schedule templates in Visual Scheduling are divided into stages that define the scheduling workflow. Each stage of the template indicates who can interact with schedules. The length of each stage is indicated by the date line in the Visual Scheduling dashboard.

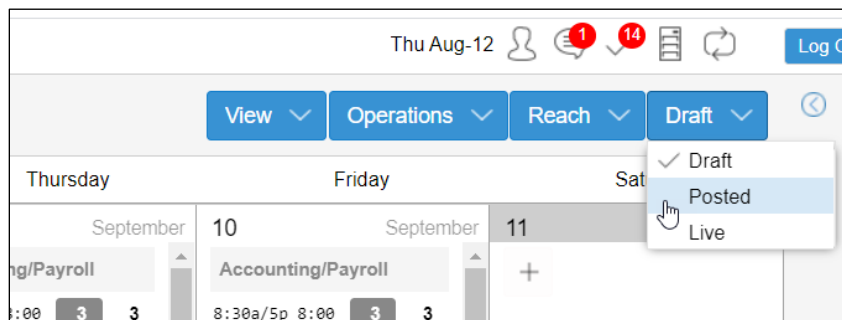
Visual Scheduling dashboard



A schedule template will advance to a new stage automatically if it has been configured to do so. If a schedule template is not set to advance automatically, you will need to advance the template at the end of each stage. Even if you have automatic advancement set, you can override it and advance the stage yourself when you are ready for the template to advance to the next stage.

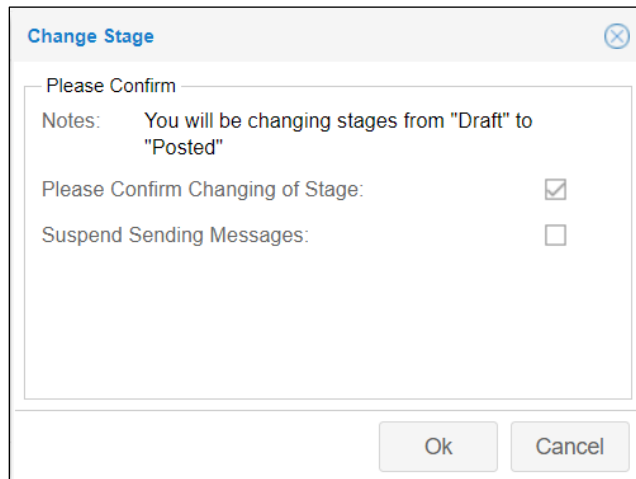
To advance a template stage:

1. Click the stage button in the schedule template page. The stage button caption displays the current stage of the template.



2. Select the stage you want to advance the schedule template to in the drop-down list.

3. Enable the Please Confirm Changing of Stage checkbox in the *Change Stage* window.



Change Stage

Please Confirm

Notes: You will be changing stages from "Draft" to "Posted"

Please Confirm Changing of Stage: ☒

Suspend Sending Messages: ☐

Ok Cancel

4. Enable the Suspend Sending Messages checkbox to prevent employees from receiving notification of the schedule template stage change.