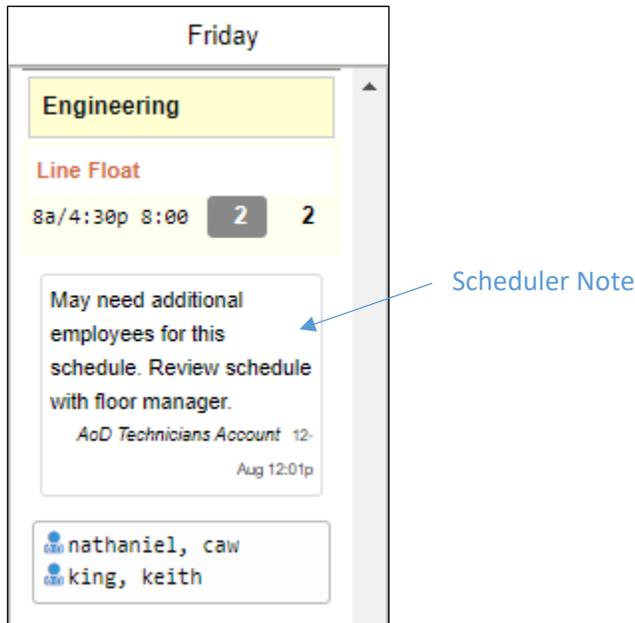


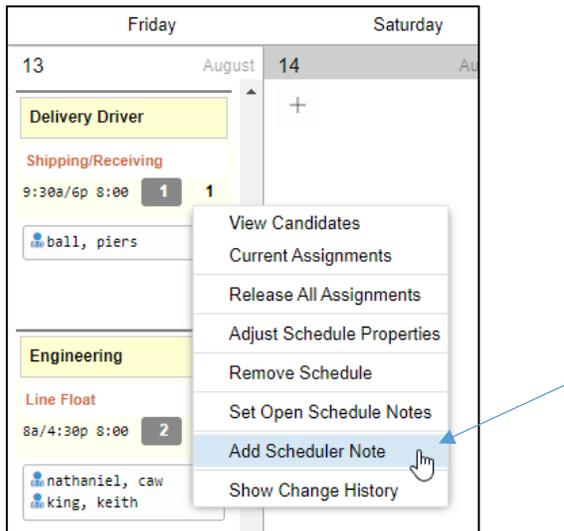
# Visual Scheduling: Adding Scheduler Notes

Schedulers can add information to a coverage schedule that is shared only among other schedulers who have access to the schedule template. These schedule notes are displayed below the coverage schedule times in the template and are not visible to employees.

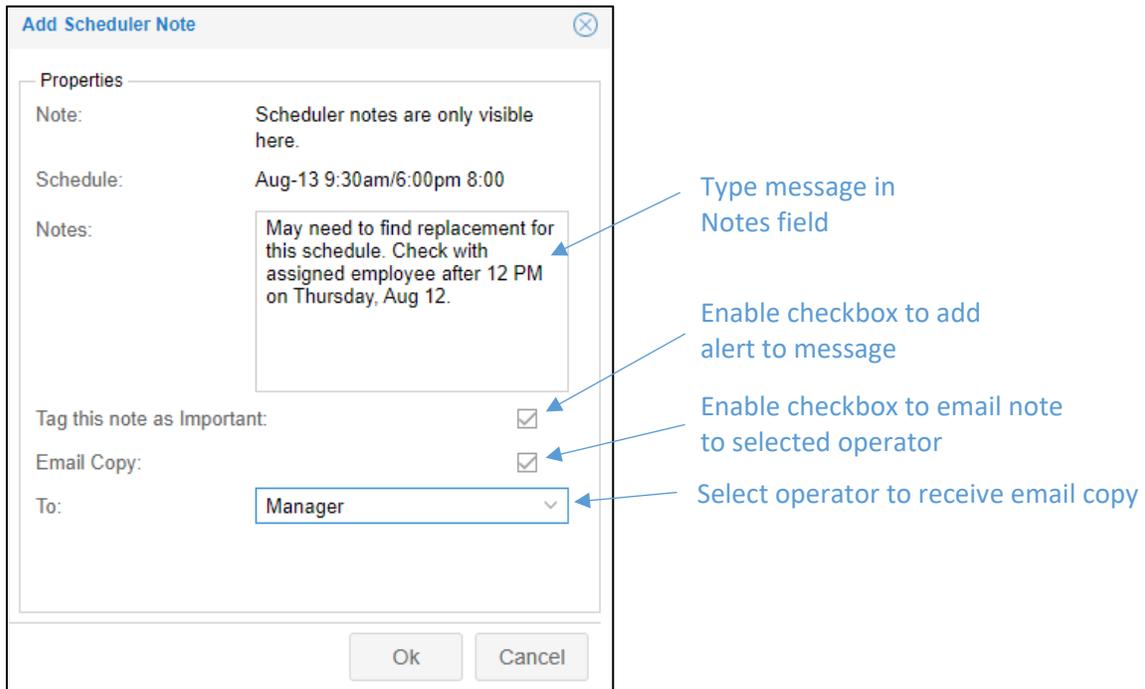


To add a scheduler note to a coverage schedule in Visual Scheduling template:

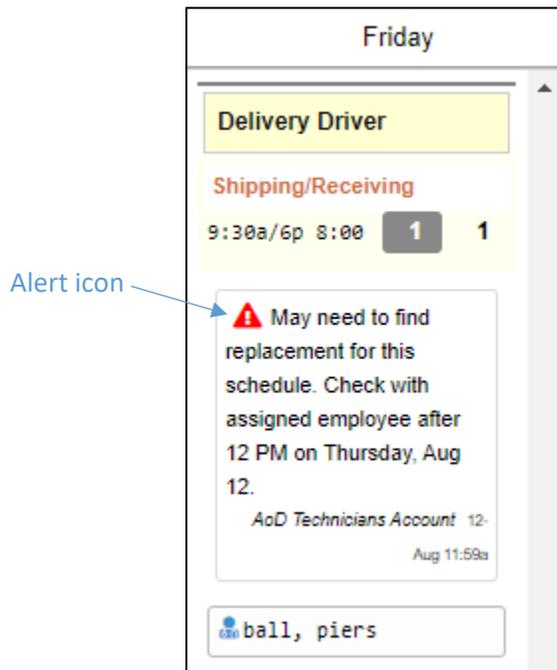
1. Click the coverage schedule time in the schedule template and select Add Scheduler Notes.



2. Type your note in the Notes field of the *Coverage Schedule Properties* window.



3. Enable the Tag this Note as Important check box to include an alert icon in the message.



4. Enable the Email Copy check box if you would like to directly share the note with another template operator and select the operator from the drop-down list.

The Email Copy feature is only available if other operators have been added to the schedule template properties.

| Basic Encompasses Extended Reach Workgroup Levels Tags <b>Operators</b> Shifts Address Stages |     |     |                         |               |               |  |
|---|-----|-----|-------------------------|---------------|---------------|--|
| Add   |     |     |                         |               |               |  |
| Adj   | Pay | Ops | Operator                | Role          | Access        |  |
|   |     |     | AoD Technicians Account | Administrator | VS Employees  |  |
|   |     |     | Jill Billings           | Administrator | All Employees |  |
|   |     |     | John Crane              | Administrator | All Employees |  |
|   |     |     | Manager                 | Administrator | All Employees |  |

The schedule template name, work position, and associated schedule date, start and end times are included in the email subject. The note and a link to the schedule template will be included in the body of the email.

The scheduler note displays the name of the operator that added the note and the date and time the note was created.

**Delivery Driver**

**Shipping/Receiving**

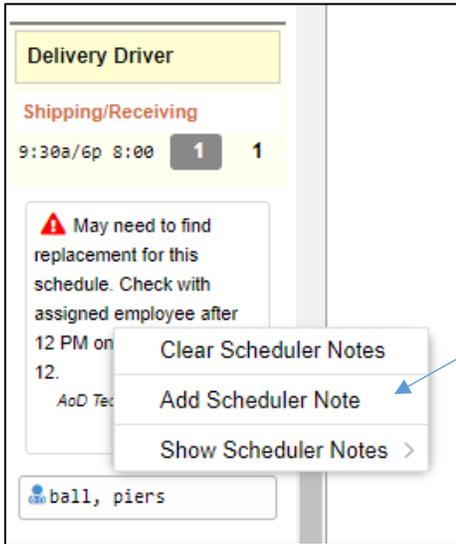
9:30a/6p 8:00 **1** **1**

**⚠ May need to find replacement for this schedule. Check with assigned employee after 12 PM on Thursday, Aug 12.**

*AoD Technicians Account* 12-

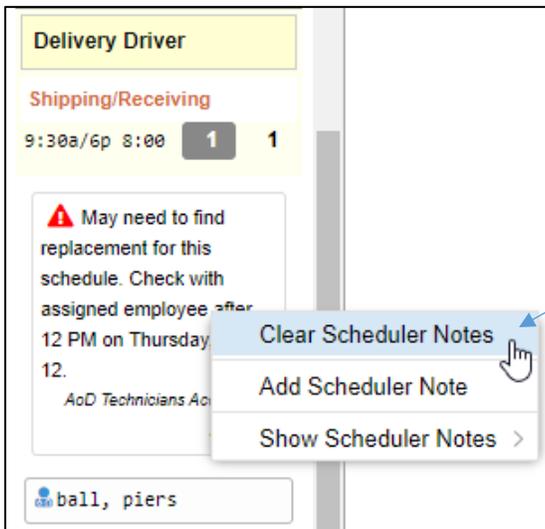
Aug 11:59a

Additional schedule notes can be added to the coverage schedule by clicking the existing scheduler note and selecting Add Scheduler Note from the menu.



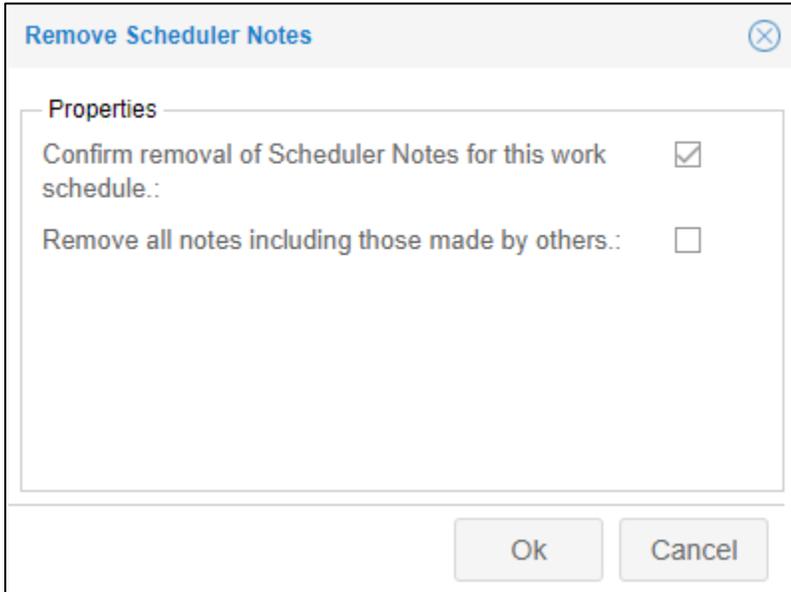
### Removing Scheduler Notes from the Template

Scheduler notes can be removed from the template by clicking the note in the template and selecting Clear Scheduler Notes from the menu.

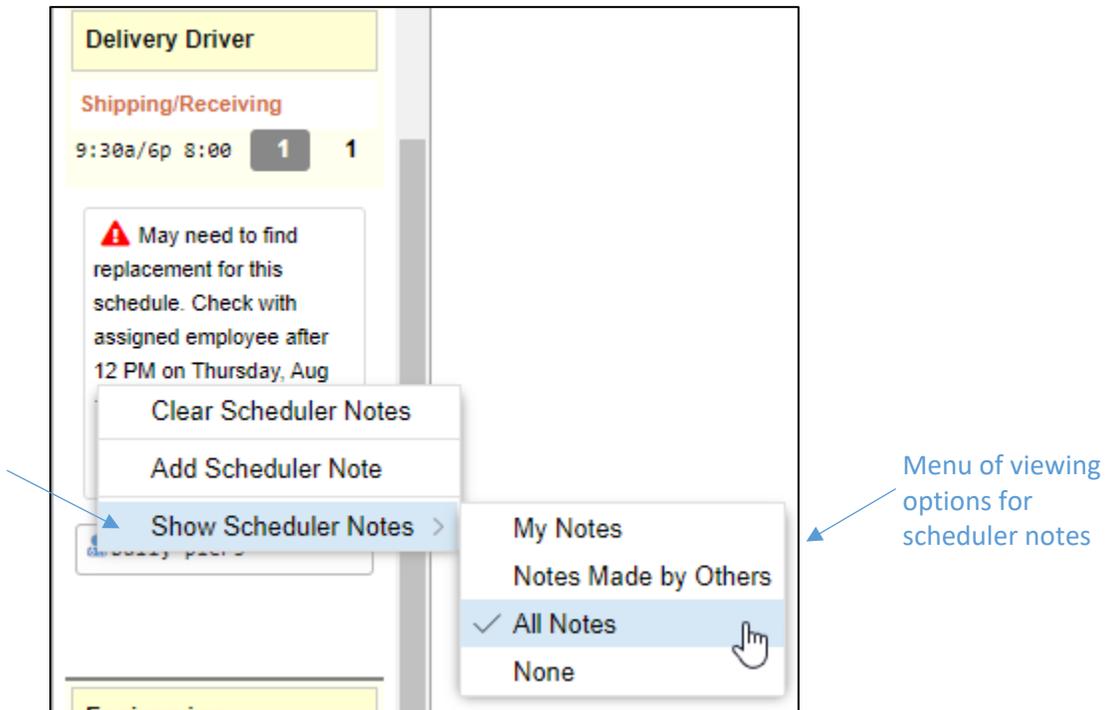


Two options are available for removing schedule notes:

- Remove the note you have selected
- Remove all notes in the template, including those notes added by other operators



To adjust how notes are displayed in the template, click scheduler note and select Show Scheduler Notes.



The following options are available for viewing scheduler notes in the template:

- **My Notes** - Displays all of the user's notes in the schedule template
- **Notes Made by Others** - Displays all of the other schedulers' notes in the schedule template
- **All Notes** - Displays all schedulers' notes in the schedule template
- **None** - Hides all schedulers' notes in the schedule template

Viewing options for scheduler notes can also be selected using the View menu in the template page. Expand the View drop-down list, select the Show menu and the Show Scheduler Notes menu item to view the same options available in the template.

