Visual Scheduling: Adding Scheduler Notes

Job Aid

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.

Add Scheduler Note		\otimes	
Properties			
Note:	Scheduler notes are only visible here.		
Schedule:	Aug-13 9:30am/6:00pm 8:00		Type message in
Notes:	May need to find replacement for this schedule. Check with assigned employee after 12 PM	r	Notes field
	on Thursday, Aug 12.		Enable checkbox to add
			alert to message
Tag this note as Importa	ant:		Enable checkbox to email note
Email Copy:	\checkmark		to selected operator
To:	Manager		Select operator to receive email copy
	Ok Cano	el	

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

	Friday	
	Delivery Driver	•
	Shipping/Receiving 9:30a/6p 8:00 1 1	
Alert icon	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	

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	: Encom	passes	Extended Reach Workgroup Levels		s Tags Operators Shift		Shifts	Address	Stages
Add									
Adj	Pay	Ops	Operator	R	lole		Ac	cess	
Ø	Ē		AoD Technicians	Account A	dministrat	or	VS	Employees	
Ø	Ē		Jill Billings	A	dministrat	or	All	Employees	
Ø	È		John Crane	A	dministrat	or	All	Employees	
Ø		872	Manager	A	dministrat	or	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.



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

Delivery Dr	iver	
Shipping/Re	ceiving	
9:30a/6p 8:0	20 1 1	
🛕 May ne	ed to find	
replacement	for this	
schedule. Cl	heck with	
assigned em	ployee after	
12 PM on 12	Clear Scheduler Notes	/
AoD Tec	Add Scheduler Note	
	Show Scheduler Notes >	
🍰 ball, pi	ers	

Removing Scheduler Notes from the Template

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

Shipping/Receiving 3:30a/6p 8:00 1 1 May need to find replacement for this schedule. Check with assigned employee after 12 PM on Thursday 12. AoD Technicians Ac. Add Scheduler Note	Delivery Driver						
A May need to find replacement for this schedule. Check with assigned employee after 12 PM on Thursday. Clear Scheduler Notes 12. AoD Technicians Ac. Add Scheduler Note	Shipping/Receiving						
May need to find replacement for this schedule. Check with assigned employee after 12 PM on Thursday Clear Scheduler Notes 12. AoD Technicians Ac Add Scheduler Note	9:30a/6p 8:00 1	1	1				
12. AoD Technicians Act Add Scheduler Note	May need to find replacement for this schedule. Check with assigned employee affect 12 PM on Thursday	Cle	ar S	chedu	ler Not	es 🖕	
	12. AoD Technicians Act	Ado	l Scl	nedule	er Note	U	
	🌡 ball, piers		T				

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

Remove Scheduler Notes	\otimes
Properties	
Confirm removal of Scheduler Notes for this work schedule.:	
Remove all notes including those made by others.:	
Ok	el

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

Delivery Driver			
Shipping/Receiving 9:30a/6p 8:00			
A May need to find replacement for this schedule. Check with assigned employee after 12 PM on Thursday, Aug			
Clear Scheduler Notes			
Add Scheduler Note			Menu of viewing
Show Scheduler Notes >	My Notes		scheduler notes
a our press	Notes Made by Others		
	√ All Notes fm		
	None		
Fasiassias		l	

Visual Scheduling: Adding 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.

View \sim	Оре	rations 🗸	Reach 🗸	Pos	st Full Time $\!$	\bigcirc
Show	>	V Show So	chedules		urday	
Masters	>	V Show So	chedule Notes		uruay	
Overlay	>	✓ Show O	pen Schedule I	Votes	August	
Position	s >	Show So	cheduler Notes	>	My Notes	
Mamba		\checkmark Show In	centives		Notes Made	by Others
wember	s >	V Show As	ssignments		✓ All Notes	h~
Trade A	ctivity	Show Al	I		None 🤇	
		Hide All	Except Schedu	Iles		

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