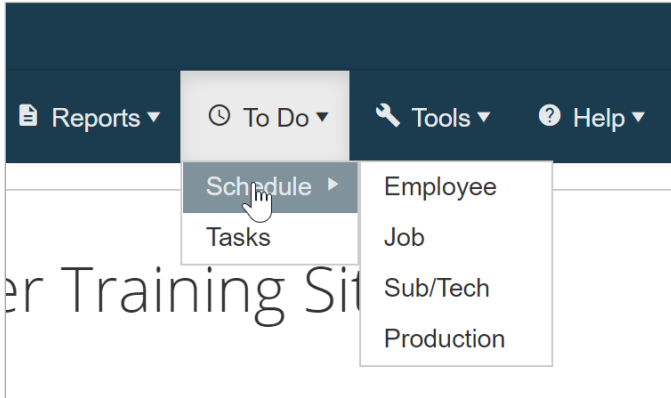


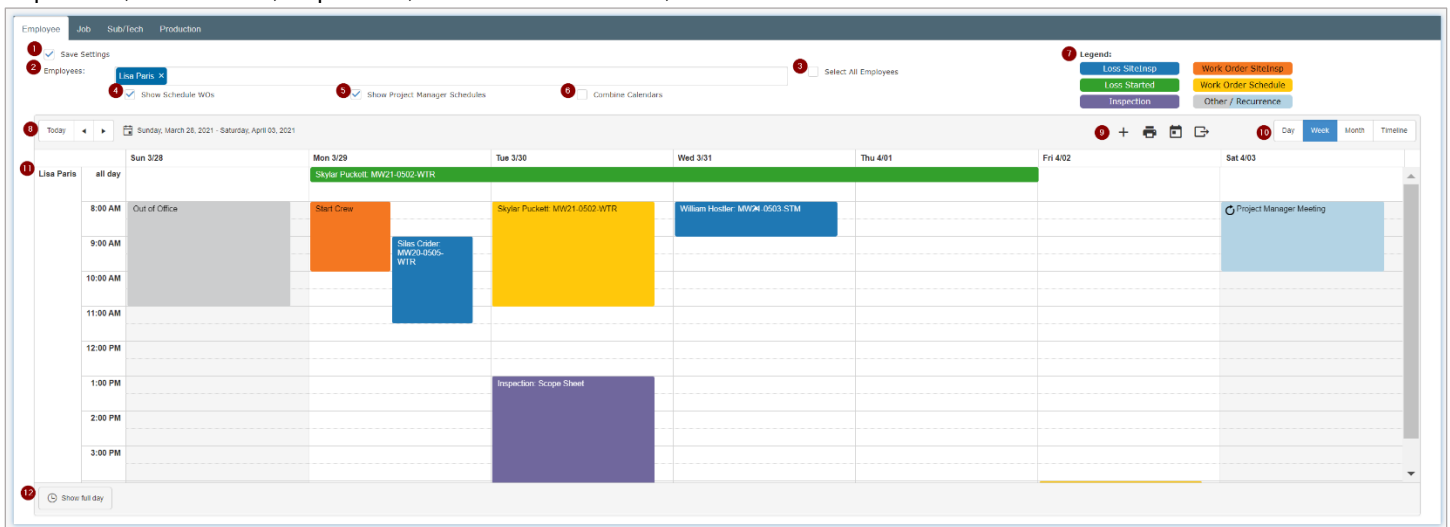
## To Do – Schedule Overview

This documentation will provide the user with an overview of the To Do – Schedule.

Go to the main grey toolbar to To Do→Schedule to select which schedule is to be obtained, Employee, Job, Sub/Tech or Production.



*Employee Schedule:* Employee schedule will provide the user with items scheduled for internal employees, such as Loss Site Inspections, Loss Started, Inspections, Work Order Schedules, etc.



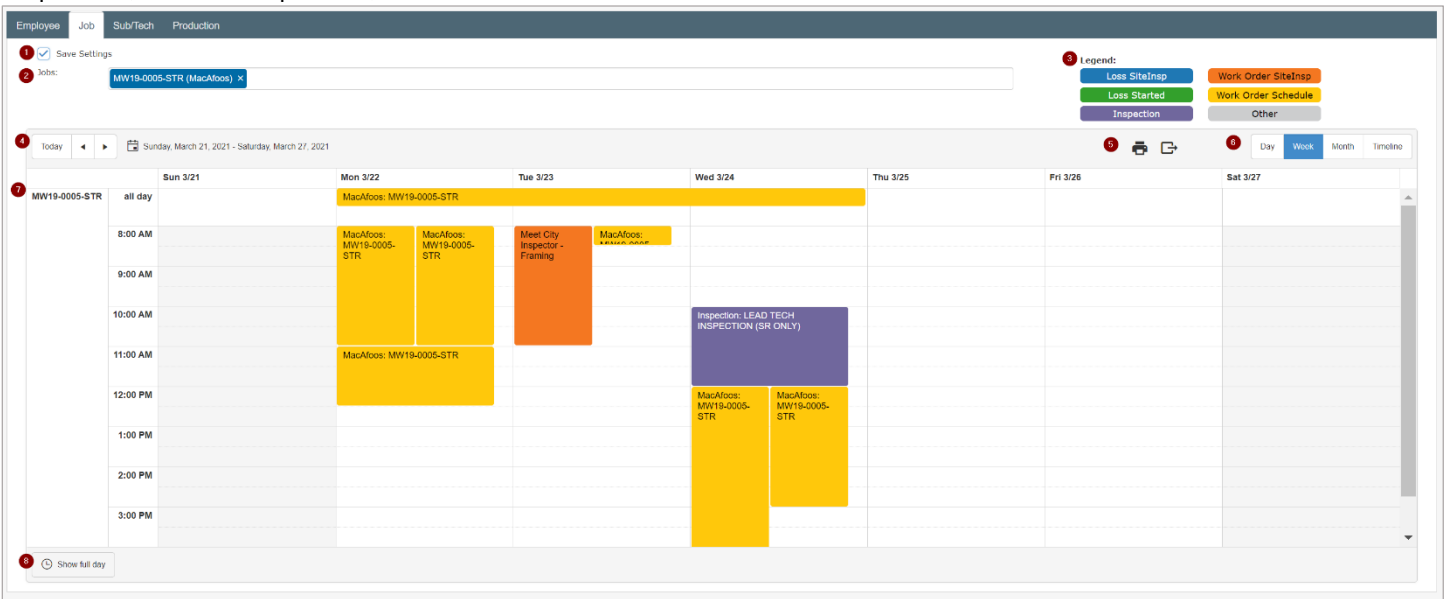
1. Save Settings – The user has the ability to save a calendar view, which includes which employees are to always display, which scheduled items such as WOs, Project Managers, etc. when this calendar is opened.
2. Employees – The user may choose which Employee's and/or WO Employees calendar to view from the dropdown.
3. Select all Employees – The user has the option to check mark this box to view *all* internal employees instead of making selections from the dropdown (see #2)
4. Show Schedule WOs – The user has the option to check mark this box to view all scheduled work orders for the employee.
5. Show Project Manager Schedule – The user has the option to check mark this box to view internal employees that have been assigned in the Project Managers' role, this includes employees that may have been assigned the Project Manager role on selected work orders.
6. Combine Calendars – The user has the option to check mark this box to view all scheduled items in one calendar screen.
7. Legend – The color-coded legend provides the user with the ability to quickly view the calendar to determine what the item that is scheduled by the color applied to the item.
8. Date Selection – The user has the option to select the correct date frame of the schedule that wish to view. By clicking on 'Today' the calendar will adjust to today's date. Selecting the move backward (◀) or move forward (▶) the calendar will adjust according to the view selected (Day, Week, Month). Click on the Calendar icon will provide the user the option to select from the calendar popup.



## To Do – Schedule Overview

- Icons – The user has been provided icons with specific functions. The icon will provide the user with the ability to Add an event to the selected employee calendar. The icon will provide the user with the ability to Print a PDF of the selected employee schedule. The icon will provide the user with the ability to Print a Daily Schedule for the selected employee. The icon will provide the user the ability to capture the selected employee schedule view and convert this view into a PDF to print, download, save, etc.
- Calendar View – The user has the option to select the date frame to view, Day, Week, Month or Timeline.
- Employee – The user can determine the calendar for the employee with this column, multiple employees calendars may be viewed individually by scrolling down it this area. The user may opt to see all calendars combined by using Combined Calendar function (see #6).
- Time Frame – The user may choose a Show business hours view (8 a.m. – 5:00 p.m.) or a Show full day view (12:00 a.m. – 11:00 p.m.). Click on the button to adjust the desired view.



**Job Schedule:** Job Schedule will provide the user with all scheduled items for a specific job or jobs, this includes Work Orders, Inspections, Loss Site Inspections, etc.



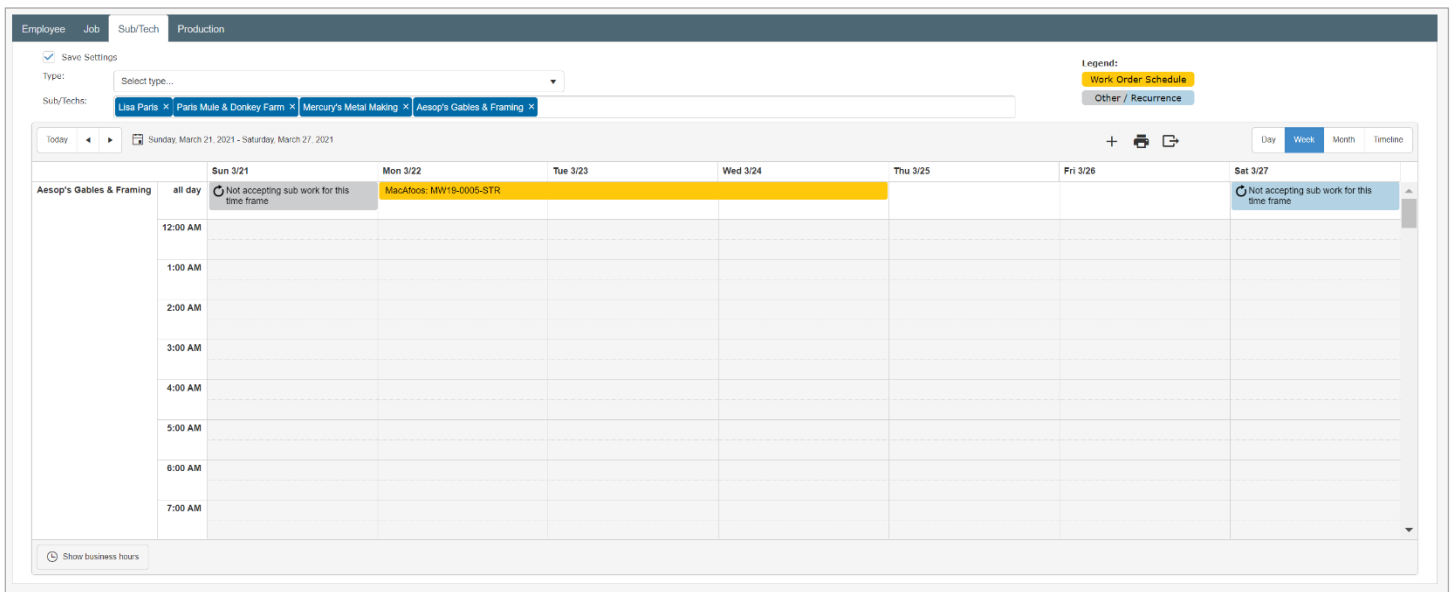
- Save Settings – The user has the ability to save a calendar view, which includes which job/s are to always display, which scheduled items such as WOs, Loss Started, Inspection, etc. when this calendar is opened.
- Jobs – The user has the ability to select which job/s from the dropdown and are to display.
- Legend – The color-coded legend provides the user with the ability to quickly view the calendar to determine what the item that is scheduled by the color applied to the item.
- Date Selection – The user has the option to select the correct date frame of the schedule that wish to view. By clicking on 'Today' the calendar will adjust to today's date. Selecting the move backward (◀) or move forward (▶) the calendar will adjust according to the view selected (Day, Week, Month). Click on the Calendar icon will provide the user the option to select from the calendar popup.







## To Do – Schedule Overview

- Icons – The user is provided icons to perform specific functions. The  icon will provide the user the ability to Print a PDF of the selected job schedule. The  icon will provide the user the ability to capture the selected job schedule view and convert this view into a PDF to print, download, save, etc.
- Calendar View – The user has the option to select the date frame to view, Day, Week, Month or Timeline.
- Job – The user can determine the calendar for the employee with this column, multiple employees calendars may be viewed individually by scrolling down in this area.
- Time Frame – The user may choose a Show business hours view (8 a.m. – 5:00 p.m.) or a Show full day view (12:00 a.m. – 11:00 p.m.). Click on the button to adjust the desired view.

*Sub/Tech Schedule:* Sub/Tech Schedule provides the user with Work Orders and Other/Recurrence items that have been scheduled.

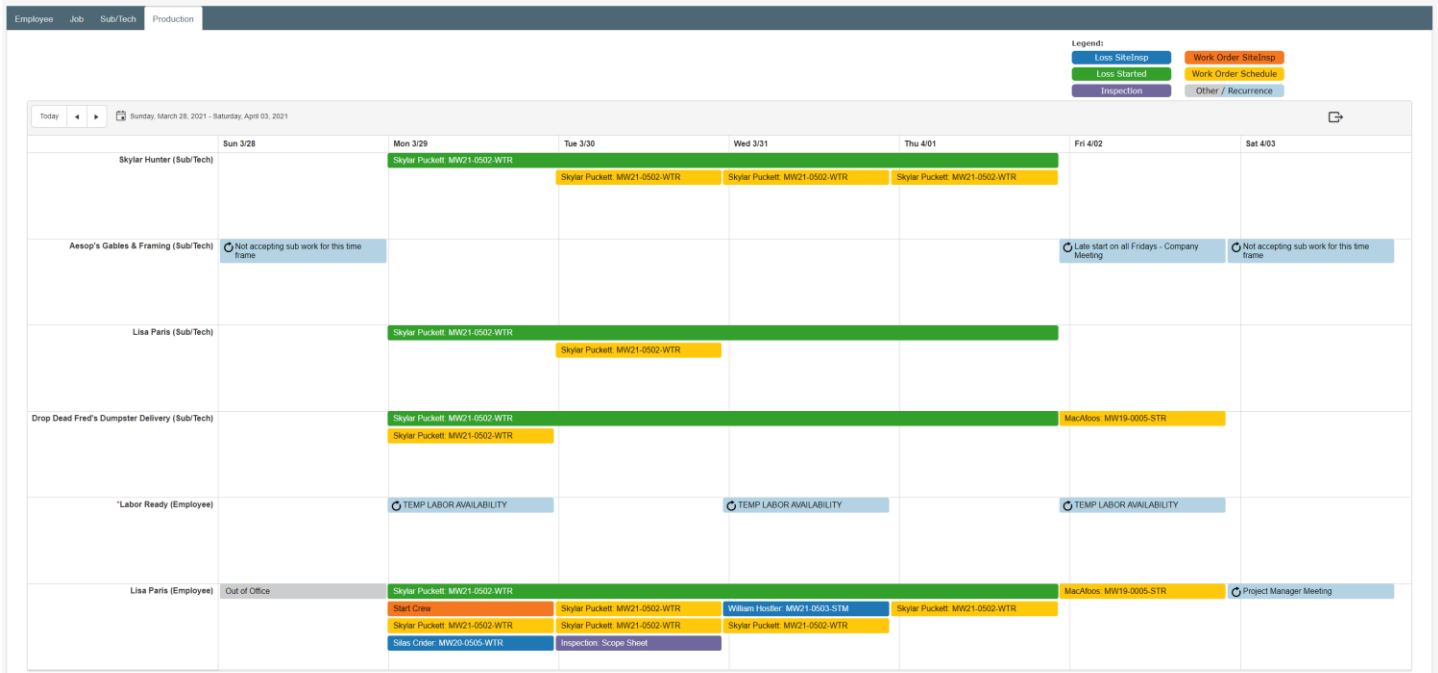



- Save Settings – The user has the ability to save a calendar view, which includes which job/s are to always display, which scheduled items such as WOs, Loss Started, Inspection, etc. when this calendar is opened.
- Type – The user has the ability to search/sort by the trade, once the trade is selected the Sub/Tech (see #3) dropdown will provide the user with the Sub/Tech that has the selected trade assigned within their sub/tech record.
- Sub/Techs – The user may choose which sub/tech/s calendar to view from the dropdown.
- Legend – The color-coded legend provides the user with the ability to quickly view the calendar to determine what the item that is scheduled by the color applied to the item.
- Date Selection – The user has the option to select the correct date frame of the schedule that wish to view. By clicking on 'Today' the calendar will adjust to today's date. Selecting the move backward (◀) or move forward (▶) the calendar will adjust according to the view selected (Day, Week, Month). Click on the Calendar icon will provide the user the option to select from the calendar popup.
- Icons – The user has been provided icons with specific functions. The  icon will provide the user with the ability to Add an event to the selected employee calendar. The  icon will provide the user with the ability to Print a PDF of the selected employee schedule. The  icon will provide the user with the ability to Print a Daily Schedule for the selected employee. The  icon will provide the user the ability to capture the selected employee schedule view and convert this view into a PDF to print, download, save, etc.

## To Do – Schedule Overview

- Sub/Tech - The user can determine the calendar for the sub/tech with this column, multiple sub/tech calendars may be viewed individually by scrolling down it this area.
- Time Frame – The user may choose a Show business hours view (8 a.m. – 5:00 p.m.) or a Show full day view (12:00 a.m. – 11:00 p.m.). Click on the button to adjust the desired view.

**Production Schedule:** Production Schedule provides the user a week view of all scheduled items in the Employee, Job, Sub/Tech calendars.



- Legend – The color-coded legend provides the user with the ability to quickly view the calendar to determine what the item that is scheduled by the color applied to the item.
- Date Selection – The user has the option to select the correct date frame of the schedule that wish to view. By clicking on 'Today' the calendar will adjust to today's date. Selecting the move backward (◀) or move forward (▶) the calendar will adjust according to the view selected (Day, Week, Month). Click on the Calendar icon will provide the user the option to select from the calendar popup.
- Icons - The user has been provided icon with specific functions. The  icon will provide the user the ability to capture the selected employee schedule view and convert this view into a PDF to print, download, save, etc.
- Sub/Tech & Employee - The user can determine the Sub/Techs and Employee schedules for the selected week (see #2). This column includes the Sub/Tech and Employees schedules, where the schedule is directly stemming from will be identified in the parenthesis after the name (Sub/Tech or Employee).