

How to Create Schedule Cards

Market: Federal/State/Local, House, Senate

Module: Events

Purpose: This guide provides instruction on how to create schedule cards.

Key Benefits

Schedule cards are used to keep a physical copy of the member's schedule for the day. These can be set up to email as background jobs daily.

1. Navigate to **Events > Reports > Custom Calendar Card.**



2. From the **Calendar to Report On** drop down box, select the appropriate calendar.
3. Select the **From Date** and **End Date** the report is to be run on
4. Choose the **Status to Report On** radio button that best reflects the report to be run.
5. Choose the **Location to Report on** Radio button that best reflects the report to be run.
6. Check the **Information to be Included** boxes that best reflect the report to be run.
7. Click **Run Report**.

Custom Calendar Card - RTF

Calendar to Report On: Report Title:

From Date: To Date:

From Time: To Time:

Status to Report On: All Status Selected Status

Location to Report On: All Office Location Selected Office Location

Information to Include: Location Notes Office Location Other Calendars
 People Private Events Status Topic Codes
 Time Zone Type Codes

To have schedule card emailed as a regular background job.

1. Follow **Steps 1-6** above. Select **Email Report**.
2. Select the date you would like to first email to be sent.
3. In the **Email Report To** field add in the appropriate email address.
4. Select **Submit Background Job**.

Custom Calendar Card - RTF

When to send the email: At

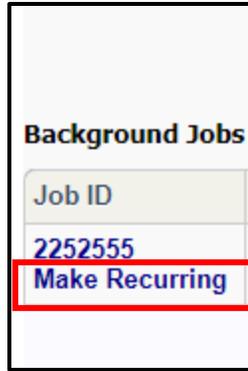
Email the report to:

From Address (Optional):

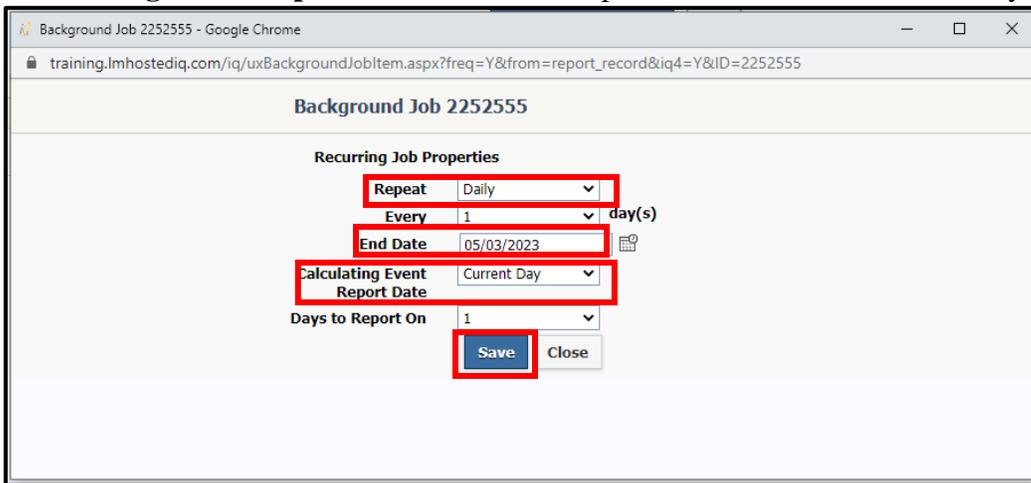
Subject (Optional):

Message (Optional):

5. Under **Job ID** select **Make Recurring**.



- a. **Repeat:** How often the schedule cards should be emailed out.
- b. **End Date:** When the schedule cards should no longer be emailed out.
- c. **Calculating Event Report Date:** from the drop down menu choose current day or next day



6. Click **Save**.