

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 drown 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.

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Custom Calendar Card - RTF						
Calendar to Report On	Isabella Strom 🔻	Report Title	Report for Isabella Strom			
From Date	5/3/2021	To Date	5/3/2021			
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	Z Location □ Notes ✓ Office Location □ Other Calendars					
People Private Events Status Topic Codes						
	Z Time Zone ☐ Type Codes					
Email Report Run Report Close						

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: 5/3/2021 At 6:00 AM					
Email the report to: add in email address here					
From Address (Optional): Enter email					
Subject (Optional): Enter the email subject					
Message (Optional): Enter the email message					
Submit Background Job Return					

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

😥 Background Job 2252555 - Google Chrome		-		×				
training.Imhostediq.com/iq/uxBackgroundJobItem.aspx?freq=Y&from=report_record&iq4=Y&ID=2252555								
Background Job 2252555								
Recurring Job Properties								
Repeat	Daily 🗸							
Every	1 ✓ day(s)							
End Date	05/03/2023							
Calculating Event Report Date	Current Day 🗸							
Days to Report On	1 ~							
	Save Close							

6. Click Save.

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