

Job Auditor Calendar User Guide

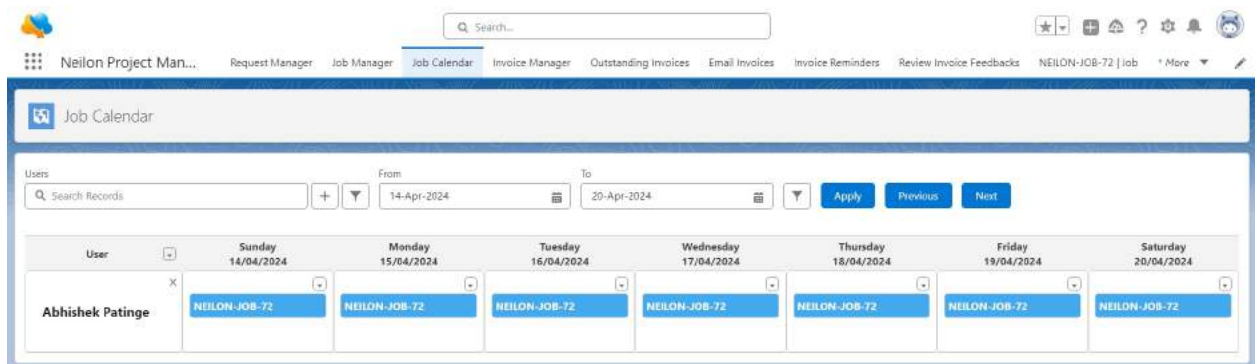
Introduction

We have functionality that helps you check the job calendar for an auditor, in which you can check and manage jobs, notes, and staff unavailabilities for an auditor.

Functionality Overview

Follow the below steps to check the job auditor calendar for users.

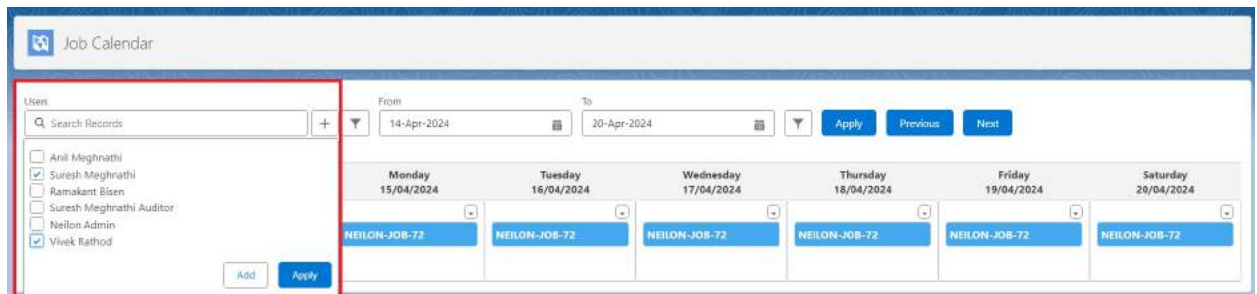
1. Navigate to the **Neilon Project Management** application from the App Launcher.
2. Go to the **Job Calendar** tab.



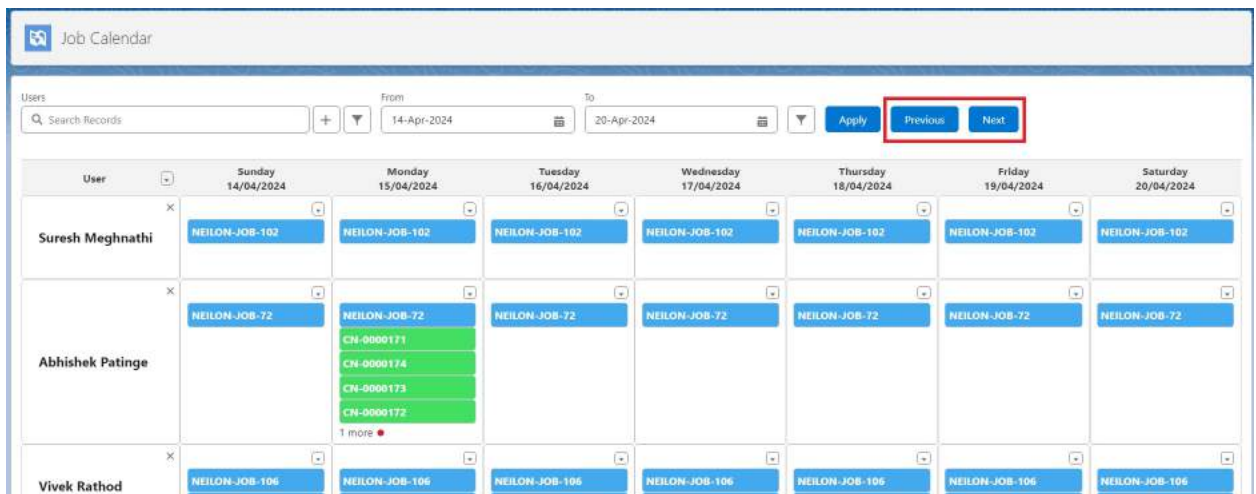
Here it shows the current logged-in user's current week calendar view. You can see all the events on a specific date. There are three types of events, each with a different color. Jobs have blue, notes have green and staff unavailabilities have a red color.

Note - Here a job named Neilon JOB - 72 has been assigned to Abhishek Patinge as a stakeholder from 14/04/2024 to 20/04/2024. You can see Neilon JOB - 72 on those dates in a blue color box.

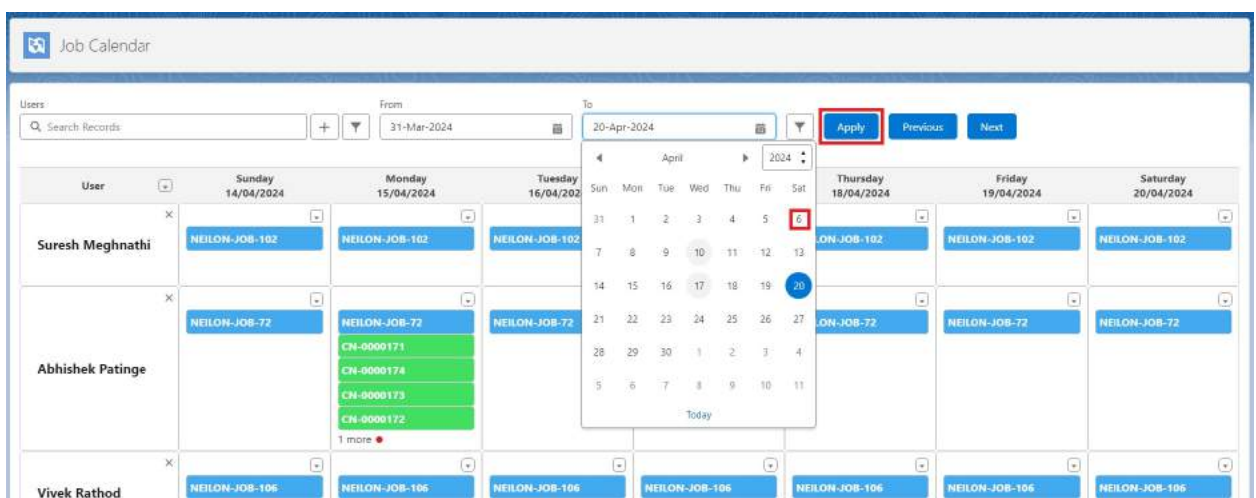
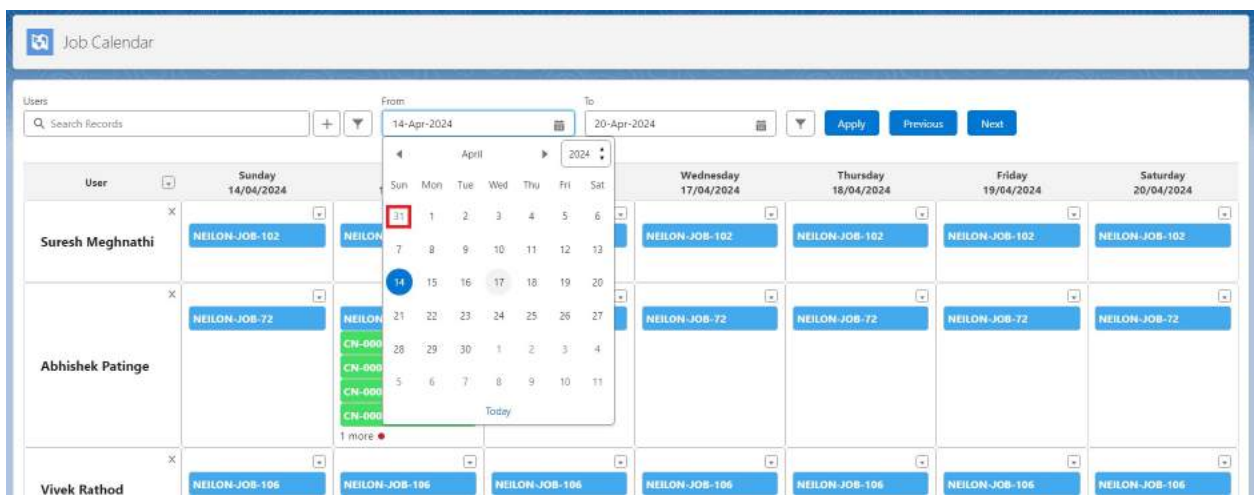
3. To check the job details, hover on the blue box of the job name. You can open the job details in the new tab by clicking on it.
4. You can search or select multiple auditors to check their calendar events. Simply search auditor names or select the auditors here.



- After selecting all the auditors, click on **Apply**. It will show all the selected auditor's calendar views.
- If you want to see the previous or next week's calendar, click on the **Previous** or **Next**.



- You can check the calendar for a specific date range. Select **From** and **To** date. Click on **Apply**



8. It will display a calendar according to the selected **From** date and **To** date.

Job Calendar

Users: Search Records + ▾ From: 31-Mar-2024 To: 06-Apr-2024 Apply Previous Next

User	Sunday 31/03/2024	Monday 01/04/2024	Tuesday 02/04/2024	Wednesday 03/04/2024	Thursday 04/04/2024	Friday 05/04/2024	Saturday 06/04/2024
Suresh Meghnathi							
Abhishek Patinge	NEILON-JOB-97	NEILON-JOB-97	NEILON-JOB-97	NEILON-JOB-97	NEILON-JOB-97	NEILON-JOB-97	NEILON-JOB-97
Vivek Rathod							

9. You can see all the auditor's calendar which comes under the current logged-in user hierarchy. Click on this filter icon here. Set **Show All Auditors** to true. Click on **Apply**.

Job Calendar

Users: Search Records + ▾ From: 14-Apr-2024 To: 20-Apr-2024 Apply Previous Next

☒ Show All Auditors Apply

User	Monday 15/04/2024	Tuesday 16/04/2024	Wednesday 17/04/2024	Thursday 18/04/2024	Friday 19/04/2024	Saturday 20/04/2024
Abhishek Patinge	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72

10. Here you can see the calendar view of all the auditors under the hierarchy of current logged-in user.

Job Calendar

Users: Search Records + ▾ From: 14-Apr-2024 To: 20-Apr-2024 Apply Previous Next

User	Sunday 14/04/2024	Monday 15/04/2024	Tuesday 16/04/2024	Wednesday 17/04/2024	Thursday 18/04/2024	Friday 19/04/2024	Saturday 20/04/2024
Suresh Meghnathi	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102
Abhishek Patinge	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72
Vivek Rathod	NEILON-JOB-106 NEILON-JOB-96	NEILON-JOB-106 NEILON-JOB-96	NEILON-JOB-106 NEILON-JOB-96	NEILON-JOB-106 NEILON-JOB-96	NEILON-JOB-106 NEILON-JOB-96	NEILON-JOB-106 NEILON-JOB-96	NEILON-JOB-106 NEILON-JOB-96

Add notes for auditors or groups

1. To add notes for an auditor, click on **Add Note**.

The screenshot shows the 'Job Calendar' interface. At the top, there's a search bar for 'Search Records' and filters for 'From' (14-Apr-2024) and 'To' (20-Apr-2024). Below this is a table with columns for days of the week (Sunday to Saturday) and rows for users: Suresh Meghnathi, Abhishek Patinge, and Vivek Rathod. Each cell in the table contains a job number (e.g., NEILON-JOB-102). A red box highlights the 'Add Note' button in the cell for Abhishek Patinge on Monday, 15/04/2024. A dropdown menu is visible below the button, showing options: 'Add Note', 'Add Staff Unavailability', and 'Show Full Details'.

2. Select the **User** for which you want to add a note. Provide a note date for which you want to add a note. Provide the note body. By default, the note will be added for the user and date for which you have clicked the Add Note.

The screenshot shows the 'New Note' form. It has a title 'New Note' and a section 'Select User or Group' with radio buttons for 'User' (selected) and 'Group'. Below this is a text field for 'User' containing 'Abhishek Patinge'. There is a 'Note Date' field with a calendar icon, showing '15-Apr-2024'. Below that is a 'Body' field with a rich text editor toolbar (font, size, bold, italic, underline, link, unlink, list, etc.) and a text area containing the message: 'Dear Abhishek, I want to inform you that job number NEILON-JOB-72 has been assigned to you.' At the bottom are 'Save' and 'Cancel' buttons.

- Click on **Save**. It will save the note and show an added note in the green color box.

Job Calendar

Users: Search Records: From: 14-Apr-2024 To: 20-Apr-2024

User	Sunday 14/04/2024	Monday 15/04/2024	Tuesday 16/04/2024	Wednesday 17/04/2024	Thursday 18/04/2024	Friday 19/04/2024	Saturday 20/04/2024
Suresh Meghnathi	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102
Abhishek Patinge	NEILON-JOB-72	NEILON-JOB-72 CN-0000171	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72
Vivek Rathod	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99

- To check the note details, hover on the green box of the note name. You can open the note preview by clicking on it.

FROM: TO:

Note: CN-0000171

Job Calendar Note Number
CN-0000171

User
Abhishek Patinge

Note Date
15/04/2024

Body
Dear Abhishek, I want to inform you that job number NEILON-JOB-72 has been assigned to you.

- Similarly, if you want to add a note for a particular user group, then select **Group** Radio. Select the user group, provide a note, note body, and save the note.

New Note

Select User or Group

☐ User
☒ Group

Group

Australia Office Group

Note Date

15-Apr-2024

Body

Salesforce Sans 12
 B I U
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Hello Guys, I want to inform you that job number NEILON-JOB-72 has been assigned to you.

Save
Cancel

Add staff unavailabilities for auditors

- To add staff unavailability for an auditor, click on **Add Staff Unavailability**.

Job Calendar

Users: Search Records + From: 14-Apr-2024 To: 20-Apr-2024 Apply Previous Next

User	Sunday 14/04/2024	Monday 15/04/2024	Tuesday 16/04/2024	Wednesday 17/04/2024	Thursday 18/04/2024	Friday 19/04/2024	Saturday 20/04/2024
Suresh Meghnathi	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102
Abhishek Patinge	NEILON-JOB-72	NEILON-JOB-72 CN-9999171	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72
Vivek Rathod	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99

Note: A context menu is shown over the Tuesday entry for Abhishek Patinge, with 'Add Staff Unavailability' highlighted in red.

- Select the **Auditor** for which you want to add staff unavailability. Select **From Date** and **To Date** for which a staff is unavailable. Provide **Unavailability Category** and **Body**.

Events (15/04/2024)

Jobs (1)

Job#	Job Status	Job Start Date	Job End Date
NEILON-JOB-72	Proposed	01-Apr-2024	30-Apr-2024

Notes (1)

Name	Body	Related To	Action
CN-0000171	Dear Abhishek, I want to inform you that job number NEILON-JOB-72 has been assigned to you.	Abhishek Patinge	

Staff Unavailabilities (1)

Name	Related To	From Date	To Date	Unavailability ...	Body	Action
SU-0000029	Abhishek Patinge	15-Apr-2024	15-Apr-2024	Holiday	High Fever	

Cancel

Manage notes and staff unavailabilities

- You can edit or delete the notes and staff unavailabilities from here.

Events (15/04/2024)

Jobs (1)

Job#	Job Status	Job Start Date	Job End Date
NEILON-JOB-72	Proposed	01-Apr-2024	30-Apr-2024

Notes (1)

Name	Body	Related To	Action
CN-0000171	Dear Abhishek, I want to inform you that job number NEILON-JOB-72 has been assigned to you.	Abhishek Patinge	Edit Delete

Staff Unavailabilities (1)

Name	Related To	From Date	To Date	Unavailability ...	Body	Action
SU-0000029	Abhishek Patinge	15-Apr-2024	15-Apr-2024	Holiday	High Fever	

Cancel

- Click on edit to edit note. Update note detail. Click on Save. The note will be updated successfully. Click on Delete to delete the note. The confirmation will be displayed. Click Ok. The note will be deleted successfully. You can edit or delete the staff unavailabilities same as we have done for the notes.

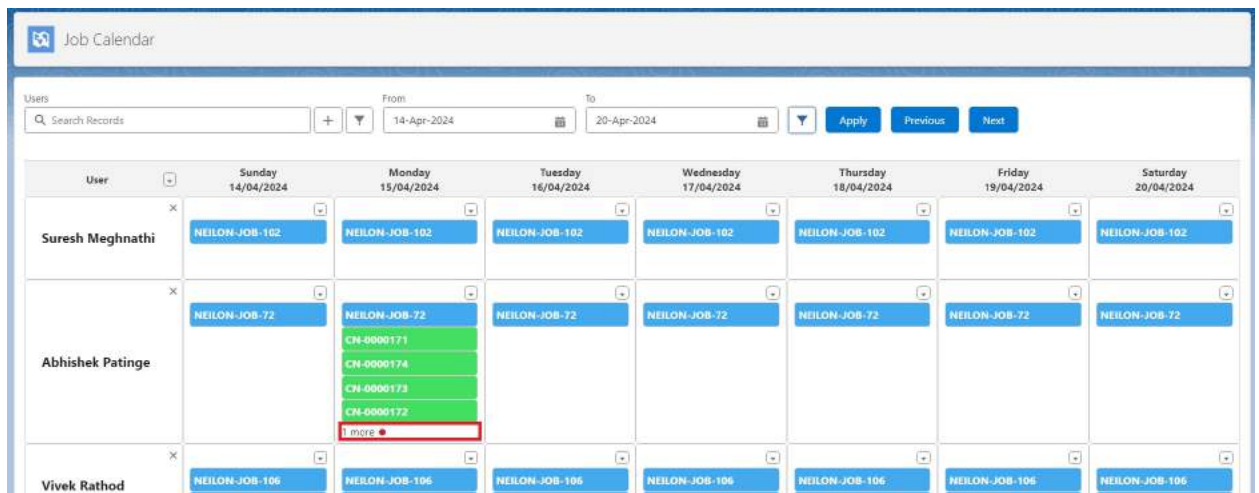
More counts for events

1. If the auditor has many jobs, notes, and staff unavailabilities for any particular day then it will show only a few events, and the rest will be shown as **more** count. You can click on **more** to check all the events for that day.

Note - More count depends on the number of users in the calendar view. The priority of showing events will be Jobs, Notes, and Staff unavailabilities. For example, If the total number of users in the calendar view is more than 10 then it will show only 2 events of all events in that calendar day and the rest of the events will be shown as **more** count.

Here, a total of five events are assigned to Abhishek Patinge for 15/04/2024. In which, he has 1 job, 4 notes, and 1 staff unavailability. The total users selected for the calendar view are 3 so as per condition if the total users in the calendar view is below 5 then it will show 5 events and the rest will show as more count. So it is showing **1 more** with a red color circle, which means it has 1 staff unavailability.

There are three types of events, each with a different color. Jobs have blue, notes have green and staff unavailabilities have a red color.



User	Sunday 14/04/2024	Monday 15/04/2024	Tuesday 16/04/2024	Wednesday 17/04/2024	Thursday 18/04/2024	Friday 19/04/2024	Saturday 20/04/2024
Suresh Meghnathi	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102
Abhishek Patinge	NEILON-JOB-72	NEILON-JOB-72 CN-0000171 CN-0000174 CN-0000173 CN-0000172 1 more	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72
Vivek Rathod	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106

2. You can click on **1 more** to check all the events for that day.

Other features

1. You can remove a specific auditor from the calendar view. Click on the cross icon here (we are removing Suresh Meghnathi from the calendar view).

Job Calendar							
Users		From	To				
Search Records		14-Apr-2024	20-Apr-2024		Apply	Previous	Next
User	Sunday 14/04/2024	Monday 15/04/2024	Tuesday 16/04/2024	Wednesday 17/04/2024	Thursday 18/04/2024	Friday 19/04/2024	Saturday 20/04/2024
Suresh Meghnathi	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102
Abhishek Patinge	NEILON-JOB-72	NEILON-JOB-72 CN-0000171 CN-0000174 CN-0000173 CN-0000172 1 more	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72
Vivek Rathod	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106

2. The auditor(Suresh Meghnathi) is removed from the calendar view.

Job Calendar							
Users		From	To				
Search Records		14-Apr-2024	20-Apr-2024		Apply	Previous	Next
User	Sunday 14/04/2024	Monday 15/04/2024	Tuesday 16/04/2024	Wednesday 17/04/2024	Thursday 18/04/2024	Friday 19/04/2024	Saturday 20/04/2024
Abhishek Patinge	NEILON-JOB-72	NEILON-JOB-72 CN-0000171 CN-0000174 CN-0000173 CN-0000172 1 more	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72
Vivek Rathod	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99	NEILON-JOB-106 NEILON-JOB-99

3. You can remove all the auditors from here. Click on the **Remove All**.

Job Calendar							
Users		From	To				
Search Records		14-Apr-2024	20-Apr-2024		Apply	Previous	Next
User	Sunday 14/04/2024	Monday 15/04/2024	Tuesday 16/04/2024	Wednesday 17/04/2024	Thursday 18/04/2024	Friday 19/04/2024	Saturday 20/04/2024
Suresh Meghnathi	Remove All NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102
Abhishek Patinge	NEILON-JOB-72	NEILON-JOB-72 CN-0000171 CN-0000174 CN-0000173 CN-0000172 1 more	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72
Vivek Rathod	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106

4. All the auditors will be removed from the calendar view.

Job Calendar

Users: Search Records + ▾ From: 14-Apr-2024 To: 20-Apr-2024 ▾ Apply Previous Next

User	Sunday 14/04/2024	Monday 15/04/2024	Tuesday 16/04/2024	Wednesday 17/04/2024	Thursday 18/04/2024	Friday 19/04/2024	Saturday 20/04/2024
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5. You can filter jobs, notes, or staff unavailabilities. If you want to see only jobs, notes or staff unavailabilities then set the filter accordingly and click on **Apply**. It will show events according to the selected filter in the calendar view.

Job Calendar

Users: Search Records + ▾ From: 14-Apr-2024 To: 20-Apr-2024 ▾ Apply Previous Next

☒ Show Jobs
☒ Show Notes
☒ Show Staff Unavailabilities
Apply

User	Sunday 14/04/2024	Monday 15/04/2024	Tuesday 16/04/2024	Wednesday 17/04/2024	Thursday 18/04/2024	Friday 19/04/2024	Saturday 20/04/2024
Suresh Meghnathi	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102	NEILON-JOB-102
Abhishek Patinge	NEILON-JOB-72	NEILON-JOB-72 CH-0000171 CH-0000174 CH-0000173 CH-0000172 1 more	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72	NEILON-JOB-72
Vivek Rathod	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106	NEILON-JOB-106