Overview

This Job Aid defines the steps to follow for creating and maintaining enterprise calendars.

There are two types of calendars. The first, Enterprise Calendar, defines the typical working days per week and the second, Resource Calendar, defines exceptions for additional non-working time for a specific resource. At a minimum, a single Enterprise Calendar is required to define organisational work time and the exceptions for company-wide non-work time such as statutory holidays. Resource Calendars will be utilised as needed to over-ride the enterprise calendar on a resource-by-resource basis. Therefore, there are two specific actions for maintaining calendars:

1. Create and maintain Enterprise Calendars
2. Create and maintain Resource Calendars

Create and maintain Enterprise Calendars

👤 Resource Manager   🔧 Resources

1. **CREATE AND MAINTAIN ENTERPRISE CALENDARS**

a. Ensure you are in the **Resources area**, click **Enterprise Calendars** in the **Resources** section.

b. Click **+ New** from the command bar to create a **new enterprise calendar** or **select and edit** an existing calendar to make changes to an **existing enterprise calendar**.
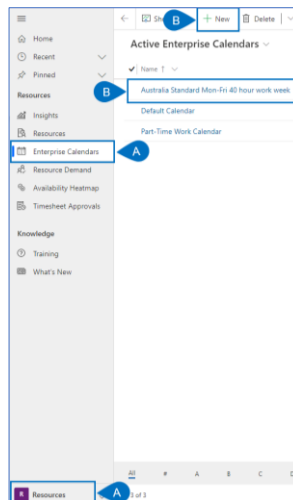
c. Ensure the **calendar's name** clearly **defines the working time** defined by the calendar.
d. Toggle on/off the typical working days for a week.
e. Define the number of working hours per day.

f. Click **Save** to update or create the enterprise calendar.

2. CREATE OR UPDATE CALENDAR EXCEPTIONS

a. Ensure you are in the **calendar** in which you want to define **calendar exceptions**.
b. Click the **Exceptions tab**.

c. Click **+ New Calendar Exception** from the command bar to create a **new enterprise calendar exception or select** an existing calendar exception and then **More details** to make changes to an **existing enterprise calendar exception** or **Delete** to remove it.
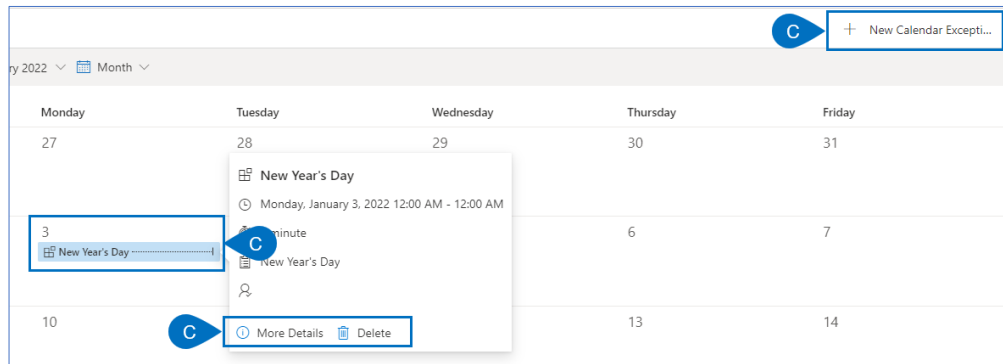
d. Give the **calendar exception a meaningful name.**
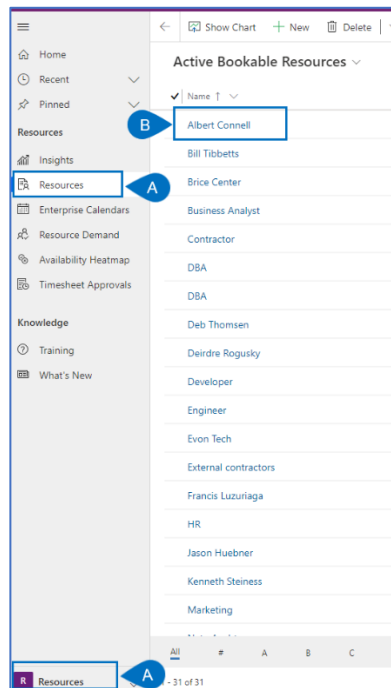e. Define the **From and To Dates** for the exception.

Create and maintain Resource Calendars

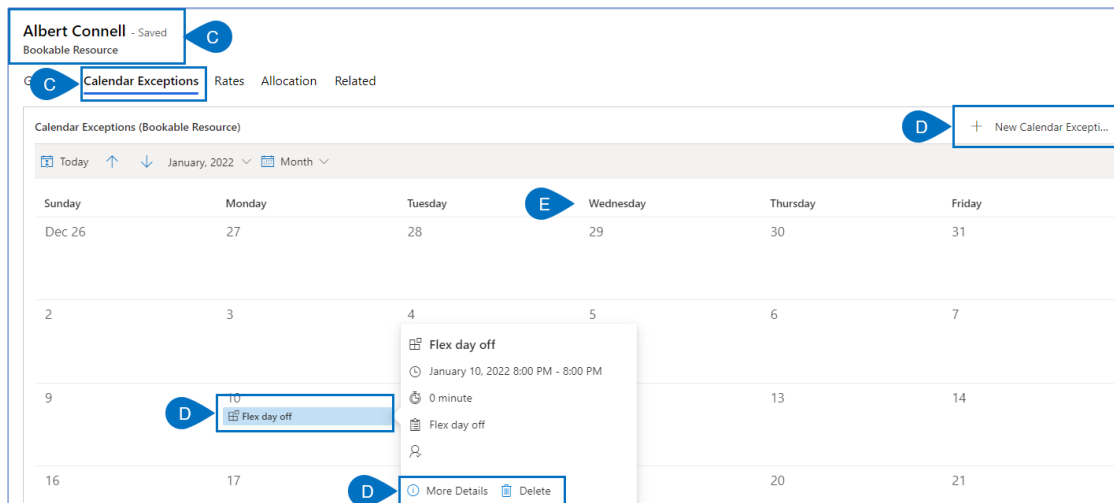Resource Manager   Resources

1. CREATE AND MAINTAIN RESOURCE CALENDARS

a. Ensure you are in the **Resources area,** click **Resources** in the **Resources** section.
b. Select and edit the **resource** for whom you wish to create a **calendar exception.**

c. Ensure you are editing the **correct Resource** and are on the **Calendar Exceptions tab**.

d. Click an **existing Calendar Exception** and then **More Details** to update it or **Delete** to remove it; or click **New Calendar Exception** to create a new one.

e. Give the **calendar exception a meaningful name.**

f. Define the **From and To Dates** for the exception.