

## Overview

This Job Aid defines the steps to follow when creating and maintaining enterprise calendars that are used to define the working and non-working hours for project resources.

Depending on your organisational needs, you may be required to create several enterprise calendars to address all the different work schedules in the organisation. Each calendar is defined by working hours per day, working days per week, and then adding any exceptions to recognise non-working days like statutory holidays, region-specific holidays, organisational exceptions, and any other conditions that change the normal working hours on a day-by-day basis across the organisation. Typically, enterprise calendars would need to be set for the different regions your organisation works in, with additional calendars if you have part-time employees or shift workers who work longer hours per day, or fewer days per week.

**Important:** Ensure that all project resources are assigned to their appropriate enterprise calendar by following the steps described in a related downloadable titled **JOB AID - Creating and maintaining bookable resources**. Resource **Capacity** for bookable resources is calculated per day between the resource's **Start Date** and **End Date** within the default **Resource Capacity Horizon** (12 months **past horizon** and 36 months **future horizon**) and based on their assigned enterprise calendar and any calendar exceptions for that enterprise calendar and the individual bookable resource.

The **Capacity** for affected resources will be recalculated whenever any of the following events occur:

1. The Enterprise Calendar field value is changed for a Bookable Resource.
2. The Working Days or Work Hours are modified for an Enterprise Calendar record.
3. A Calendar Exception is created, modified, or deleted for an Enterprise Calendar or a Bookable Resource.
4. The Scheduled Process 'Capacity Calculation for Bookable Resources' runs (by default this job is configured to run Daily).

Using the **Enterprise Calendars** list, you can perform the following actions as a **Resource Manager** or **Admin User**:

1. Update the default calendar.
2. Create new enterprise calendars.
3. Add exceptions to the resource calendar.

# Update the Default Calendar



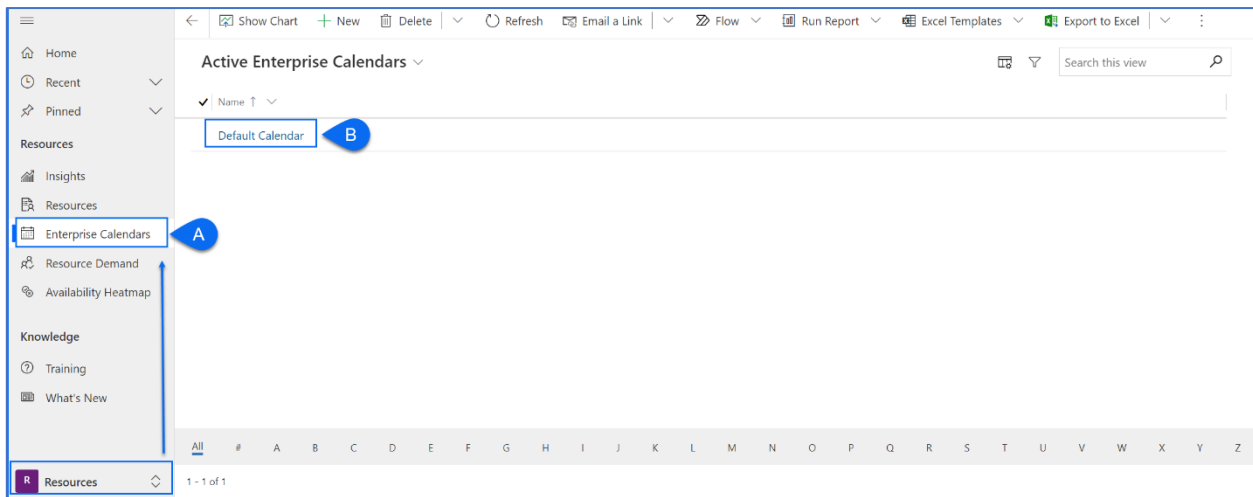
Resource Manager, Administrator



Resources > Resources > Enterprise Calendars

## 1. UPDATE THE DEFAULT WORKDAYS AND TIME

- Ensure that you are in the **Resources** area and click **Resource Calendars** in the **Resources** section.
- In the default **Active Enterprise Calendars** view, click the existing **Default Calendar** record in the **Name** column.



- Once the enterprise calendar record is open for editing, define the typical workdays in the organization by using the **Yes/No** toggle buttons for the days of the week as appropriate in the **Details** section of the form.
- Next, define the typical number of hours per standard workday in the organization in the **Hours Per Workday** input field.
- Click the **Save** button from the ribbon.

**Default Calendar** - Saved  
Enterprise Calendar

Details Exceptions Related

Name \* **Default Calendar**

Monday is Work Day	<input checked="" type="checkbox"/> Yes
Tuesday is Work Day	<input checked="" type="checkbox"/> Yes
Wednesday is Work Day	<input checked="" type="checkbox"/> Yes
Thursday is Work Day	<input checked="" type="checkbox"/> Yes
Friday is Work Day	<input checked="" type="checkbox"/> Yes
Saturday is Work Day	<input type="checkbox"/> No
Sunday is Work Day	<input type="checkbox"/> No
Hours Per Work Day	<input type="text" value="7.50"/>

**Tip:** Clicking **Save** before entering the non-working time in **Exceptions** is mandatory as the base calendar must be defined before the exceptions can be added.

## 2. ADD NON-WORKING DAYS AS EXCEPTIONS

- In the **Enterprise Calendar** form open for editing, navigate to the **Exceptions** section.
- Click the **+ New Calendar Exception** button from the command bar.

**Default Calendar** - Saved  
Enterprise Calendar

Details **Exceptions**

+ New Calendar Exception

Today ↑ ↓ November 2021 Month

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Oct 31	Nov 1	2	3	4	5	6
7	8	9	10	11	12	13

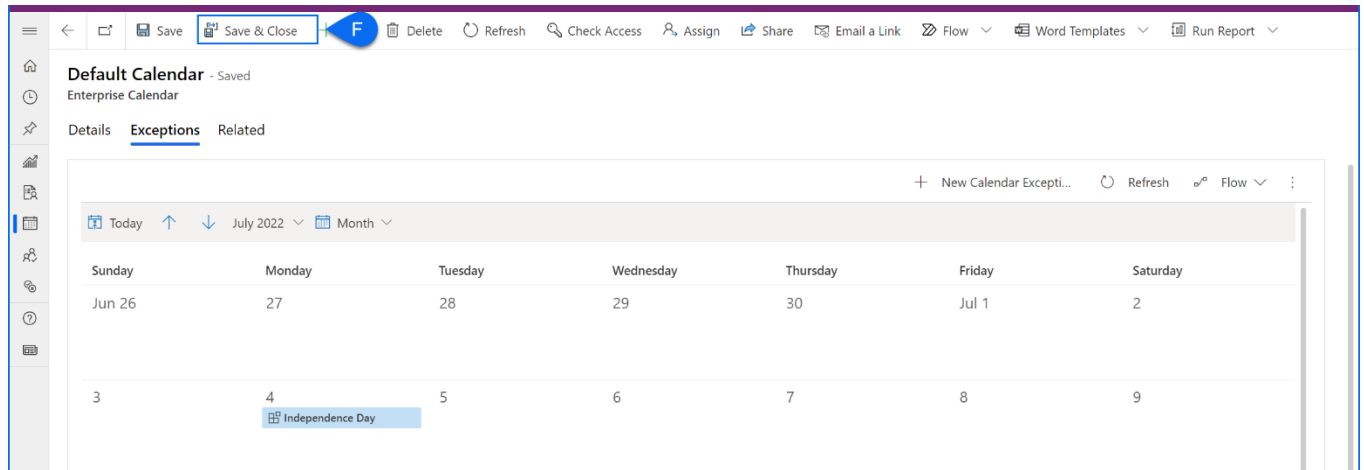
- In the **Quick Create: Calendar Exception** form on the right-hand side pane, provide a meaningful name for the non-working day in the **Name** input field.
- Next, set the non-working period using the **From** and **To** date picker fields in the form.

- e. Click the **Save and Close** button in the form to record the calendar exception.

**Tip:** Change the month being displayed on the page to view this new exception defined on the calendar. Then, clicking on the calendar exception record provides you with the options to remove it from the calendar using the **Delete** button, or edit it from the **More Details** menu.

**Tip:** Recognizing that statutory holidays and/or organization-specific non-working days can be either recurring on the same day or week of a particular month, or changing every year, and at different times, you can easily define additional exceptions by repeating the same process but using the **Save and Create New** option until all exceptions to the enterprise calendar in the current year and/or immediate future (if known) are recorded in advance (**recommended**).

- f. Once all calendar exceptions are added, click the Save and Close button from the ribbon to keep the changes applied to the enterprise calendar.

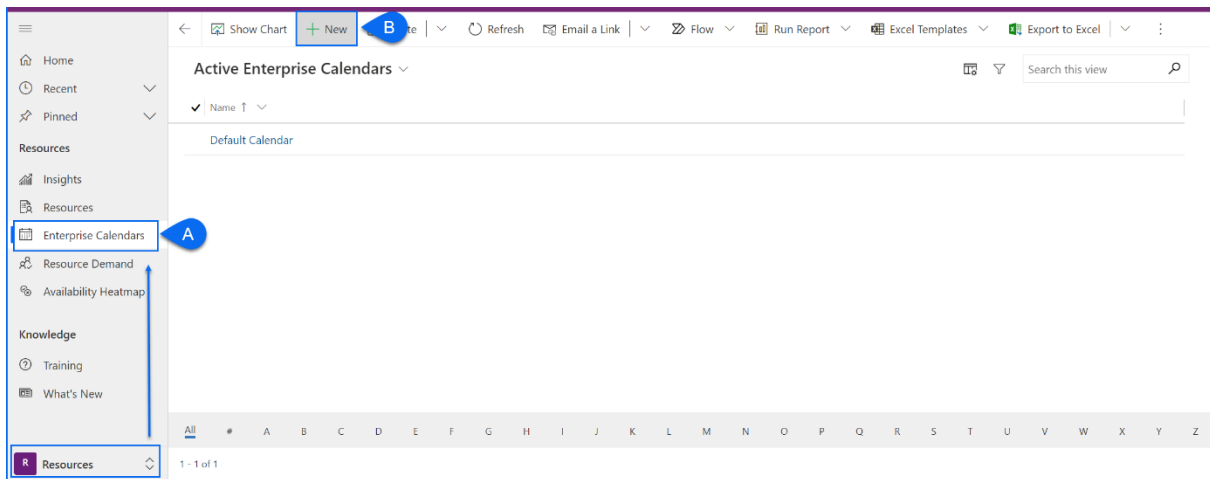


# Create new enterprise calendars

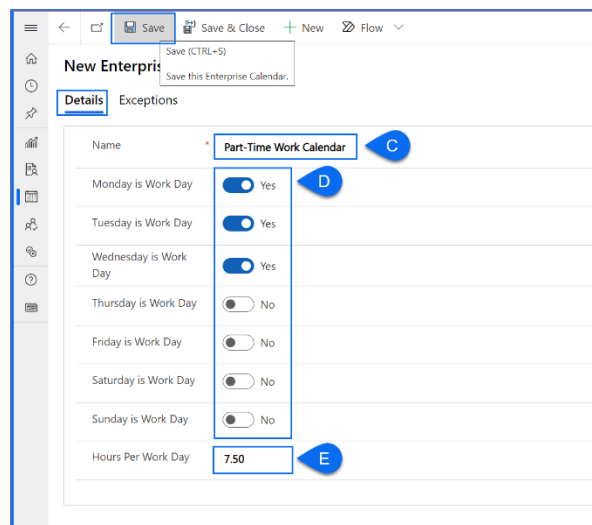
Resource Manager, Administrator  Resources > Resources > Enterprise Calendars

## 1. DEFINE CUSTOM WORKDAYS AND TIME

- Ensure that you are in the **Resources** area and click **Enterprise Calendars** in the **Resources** section.
- In the default **Active Enterprise Calendars** view, click the **+ New** button from the ribbon.



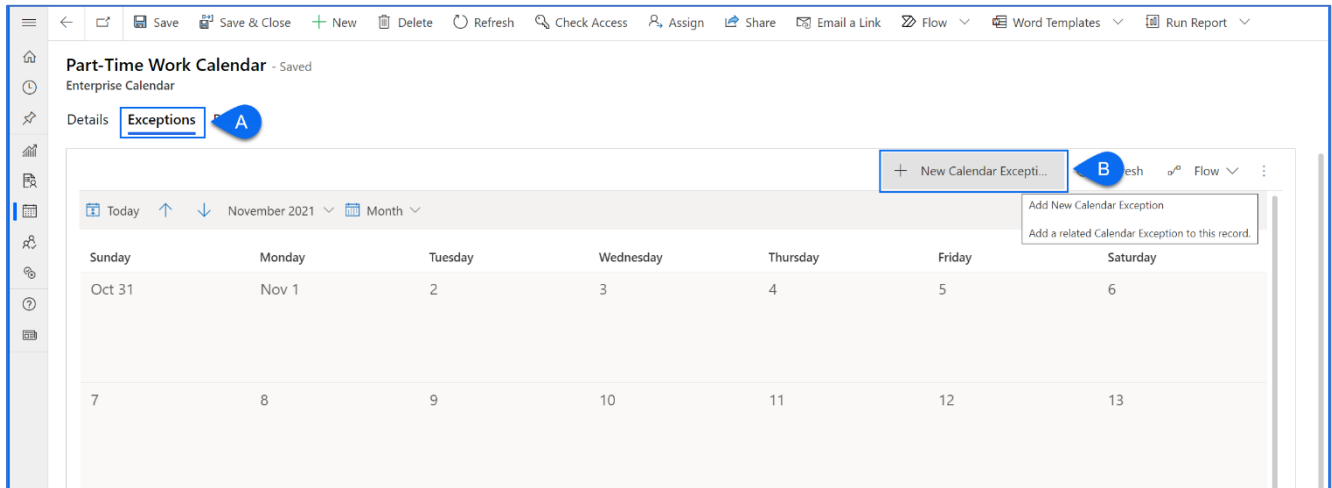
- In the **New Enterprise Calendar** form, provide a meaningful name for the new enterprise calendar in the **Name** input field so it is very clear what the calendar should be used for.
- Next, define the custom workdays in the organisation by using the **Yes/No** toggle buttons for the days of the week as appropriate in the **Details** section of the form.
- Then, define the custom number of hours per standard workday in the organisation in the **Hours Per Workday** input field.
- Click the **Save** button from the ribbon.



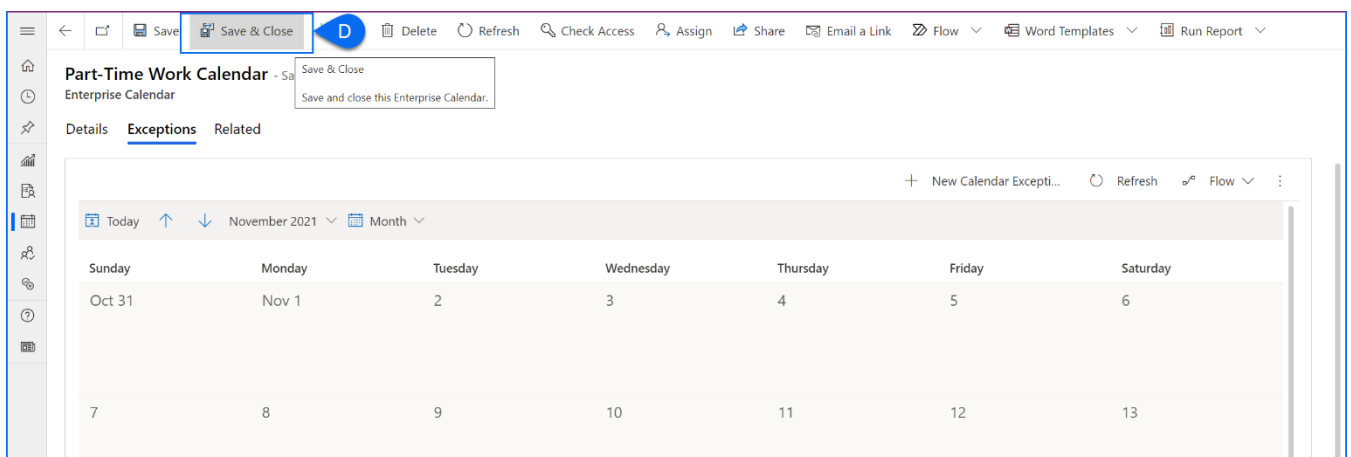
**Tip:** Clicking Save before entering the non-working time in Exceptions is mandatory as the base calendar must be defined before the exceptions can be added.

## 2. ADD NON-WORKING DAYS AS EXPECTATIONS

- In the **Enterprise Calendar** form open for editing, navigate to the **Exceptions** section.
- Click the **+ New Calendar Exception** button from the command bar.



- Follow the same process described in the above section **Update the Default Calendar** to add calendar exceptions to a new calendar record.
- Once all calendar exceptions are added, click the **Save and Close** button from the ribbon to keep the changes applied to the new enterprise calendar.



# Add exceptions to the resource calendars



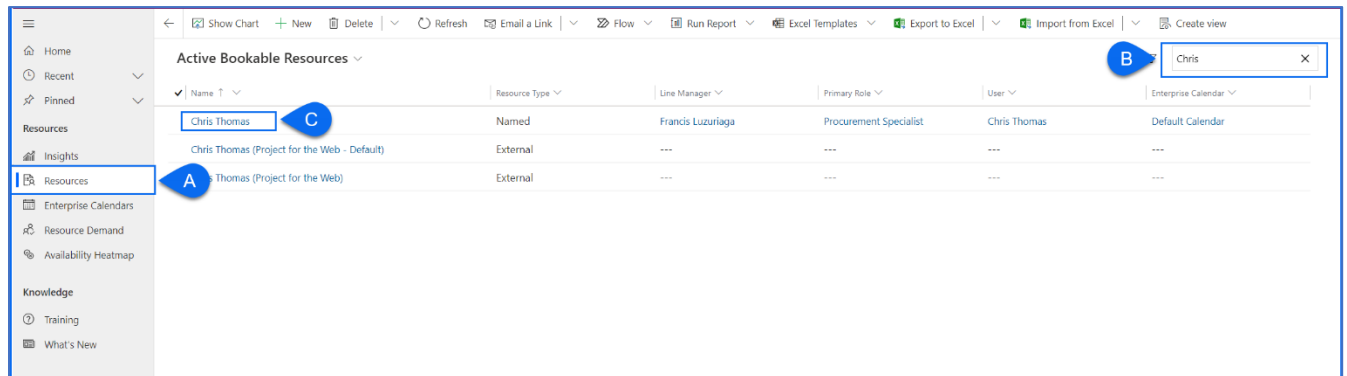
Resource Manager, Administrator



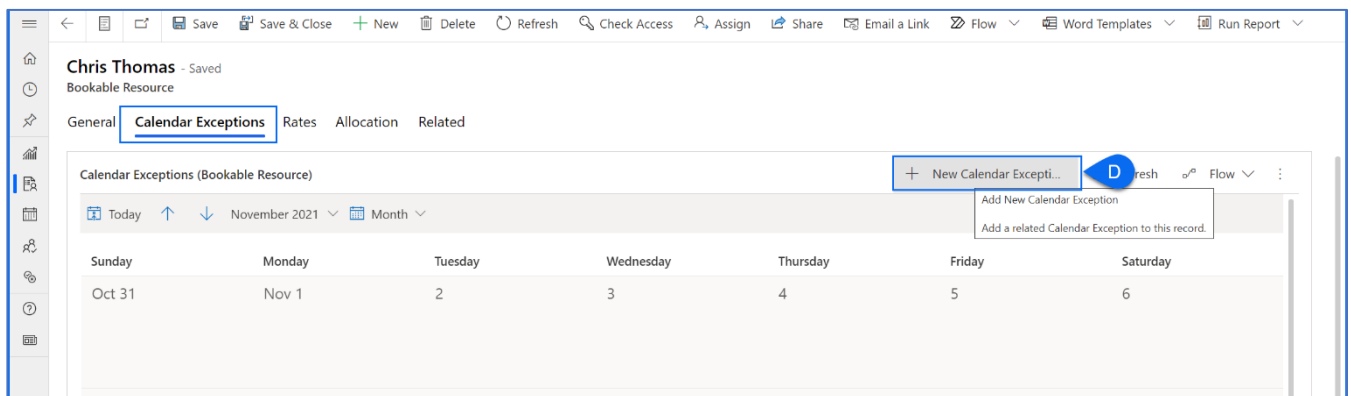
Resources > Resources > Resources

## 1. ADD NON-WORKING DAYS AS EXCEPTIONS TO BOOKABLE RESOURCE

- Ensure that you are in the **Resources** area and click **Resources** in the **Resources** section.
- In the default **Active Bookable Resources** view, type the name of the resource you wish to update using the **Search this view** box.
- Click the name of the resource in the **Name** column from the results displayed on the page.

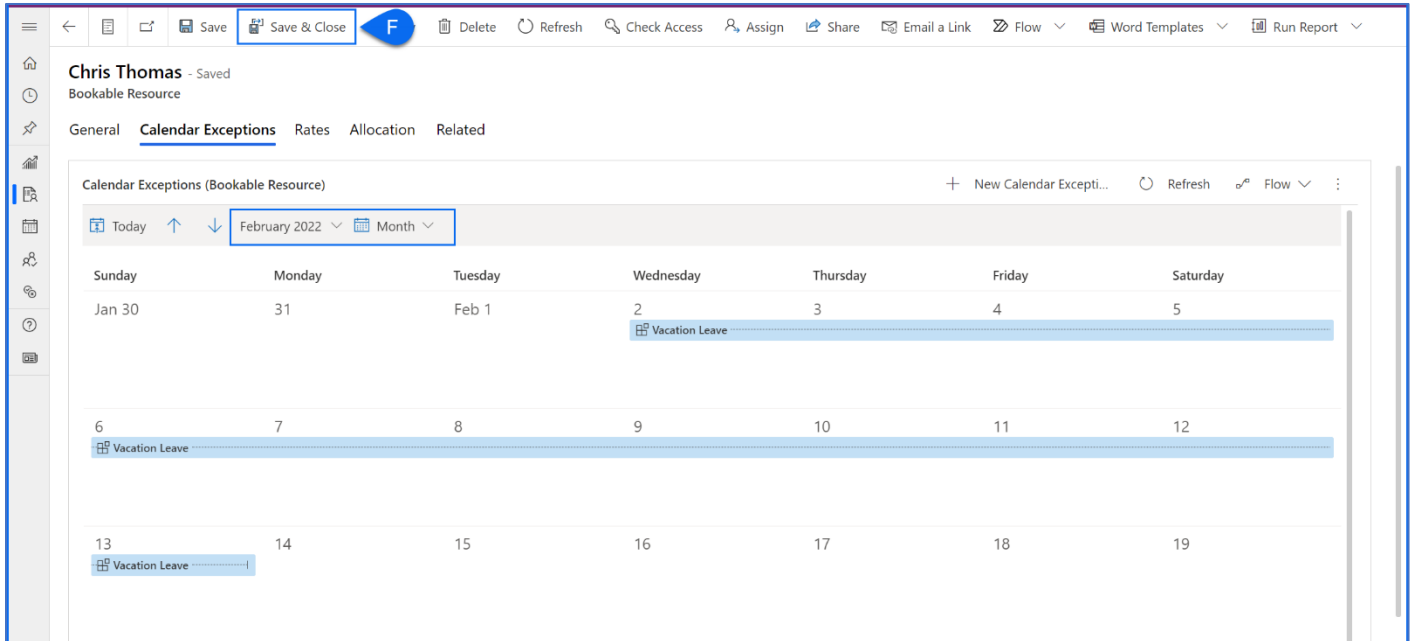


- Once the **Bookable Resource** record is open for editing, navigate to the **Calendar Exceptions** tab and click the **+ New Calendar Exception** button from the command bar.



- Follow the same process described in the above section **Update the Default Calendar** to add calendar exceptions to an existing bookable resource's calendar.
- Once the calendar exception is added, click the **Save and Close** button from the ribbon to keep the changes applied to the bookable resource's calendar.





The screenshot shows the 'Calendar Exceptions' tab for a resource named Chris Thomas. The interface includes a top navigation bar with various icons and a sidebar on the left. The main content area displays a calendar for February 2022, with days of the week as columns and dates as rows. 'Vacation Leave' exceptions are marked for the following dates:

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Jan 30	31	Feb 1	2 Vacation Leave	3	4	5
6 Vacation Leave	7	8	9	10	11	12
13 Vacation Leave	14	15	16	17	18	19

**Important:** Resource Calendar exceptions override the enterprise calendar for a resource to define additional non-working time, like vacation which is not identified in the enterprise calendar. Consequently, it reduces the resource capacity in the selected period ensuring that project managers have an accurate understanding of the number of hours each resource is available for project allocation.