Calendar
UX User Guide

infor Pathway

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Overview

The Calendar system allows for the creation of a number of calendars which are used when submitting reports based on certain calendar dates, and selecting required dates in date fields. A calendar can be created for each application, however a nominated default calendar will be accessed where no application specific calendar exists.

The Calendar System provides the means by which:

- Calendar days can be displayed in different colours.
- New Calendars can be created.
- Calendar days can be maintained.
- Calendars can be copied.

Calendar Maintenance

This chapter describes the establishment of settings for the calendar system. Calendar colours, years, holidays, opening times etc can be set up for utilisation by all other Pathway applications.

The following topics are covered in this section:

- Setting the Calendar Colours
- Creating Calendars
- Copying Calendar Years
- Maintaining Calendar Years
- Maintaining Calendar Days

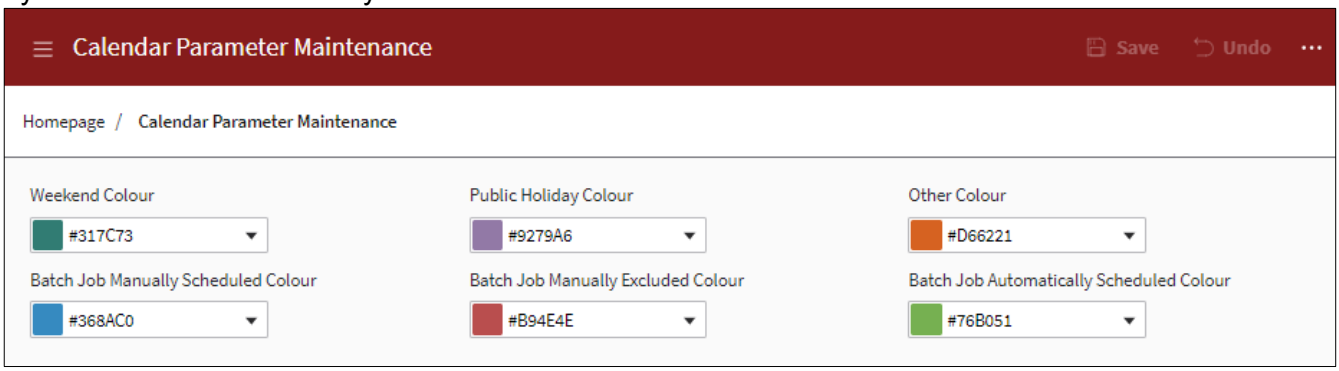
Setting the Calendar Colours

The screen colours that the Calendar System uses are user definable. This section describes how to set the calendar colours for use by your site. The colours are set at the system level.

Calendar Colour Maintenance

Used to establish the colours for use by the Calendar System. Individual colours are selected for Weekend days, Public Holiday days and “Other” days.

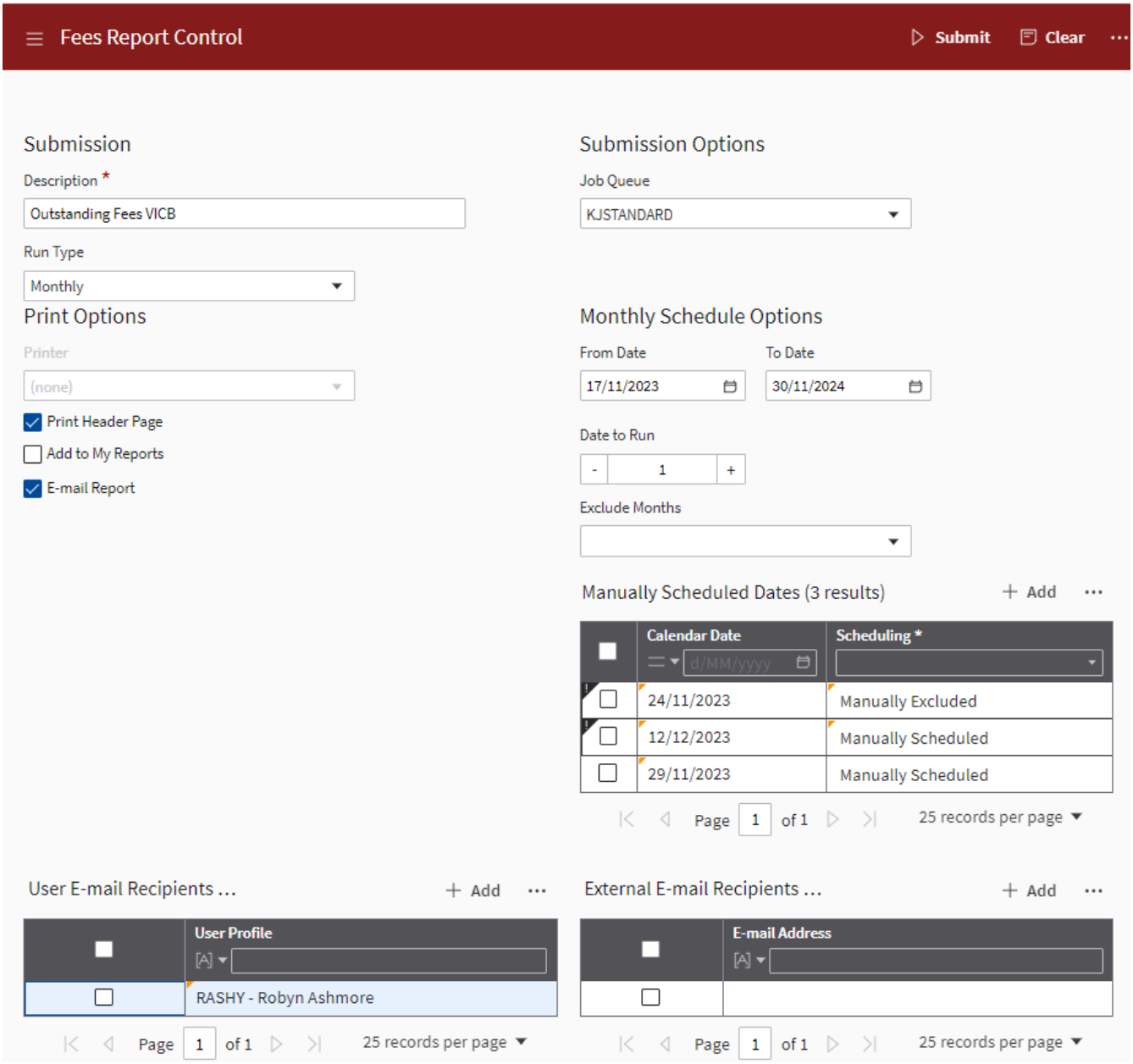
System Administration >> System Parameters >> Calendar Parameter Maintenance

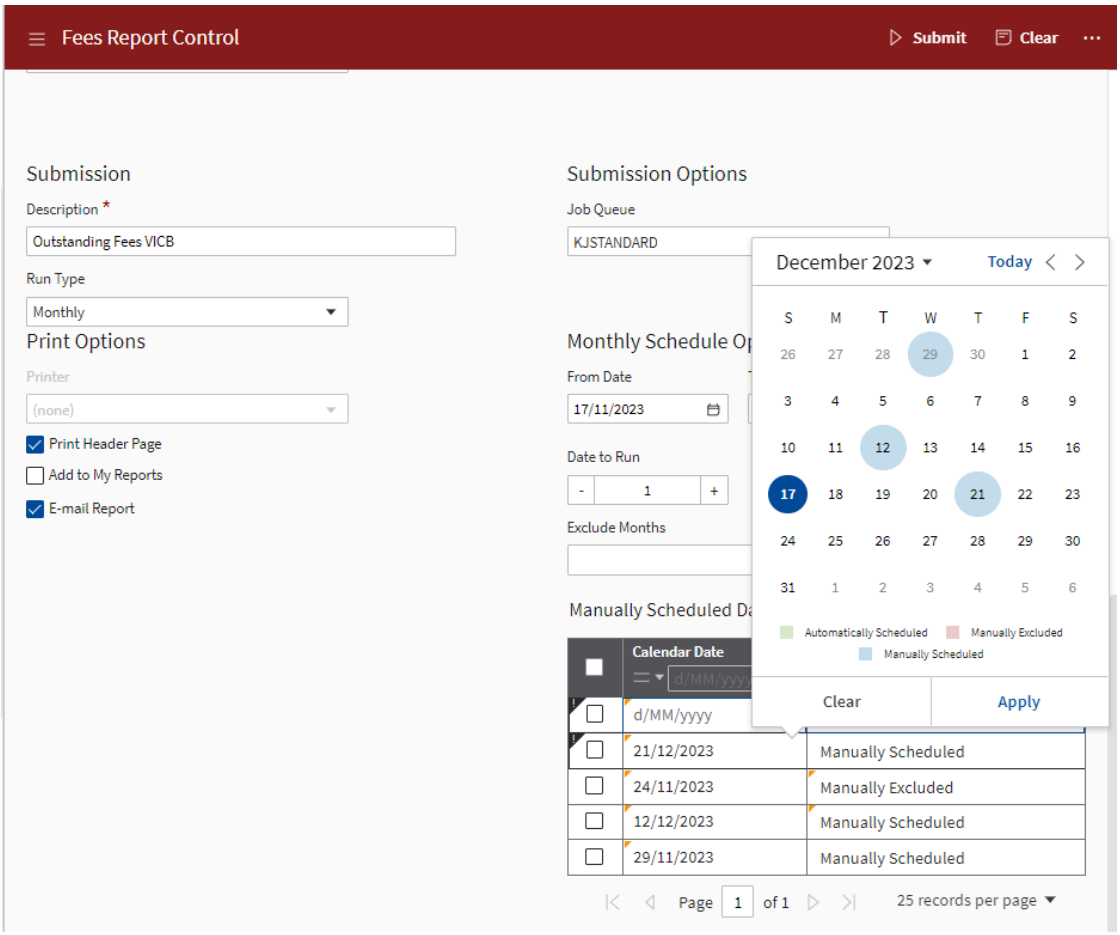


Each Colour

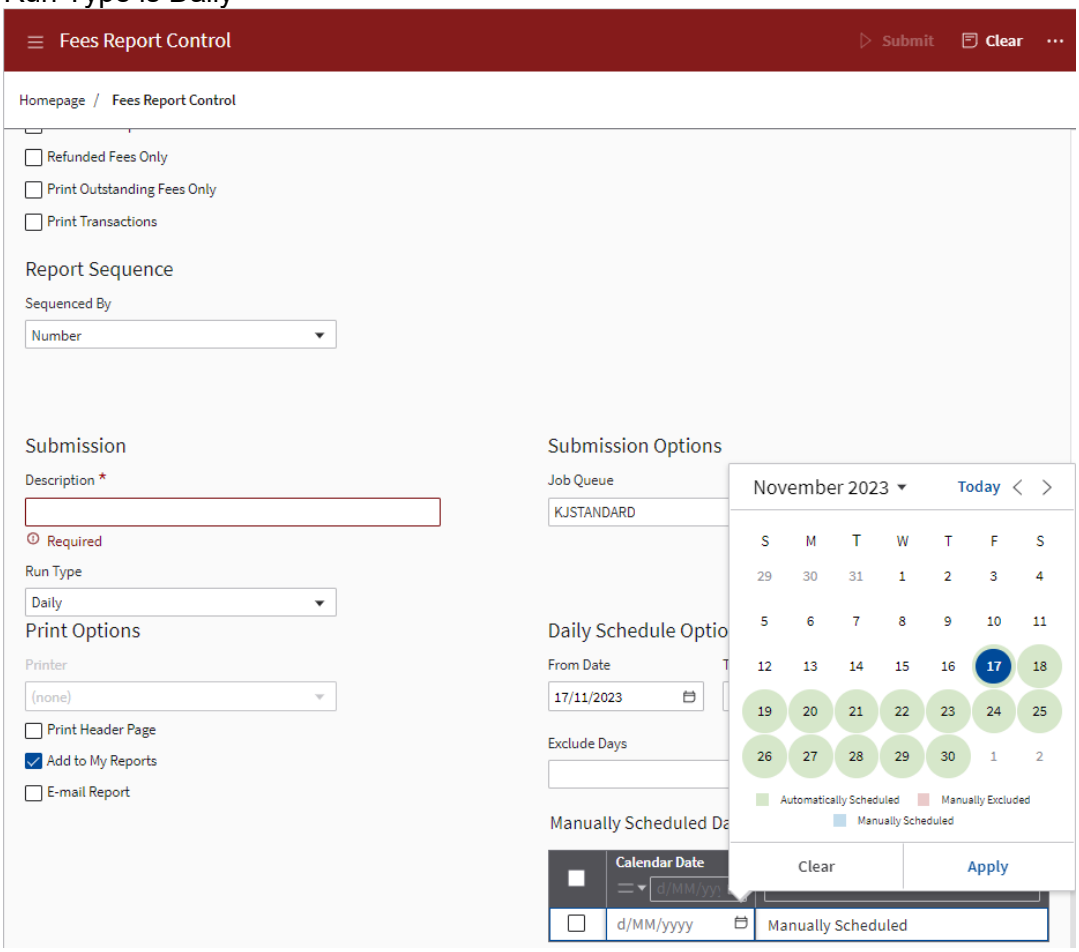
Each field determines the colour that will be used to denote each type of day

Weekend Colour	Saturday and Sundays
Public Holiday Colour	Declared Public Holidays
Other Colour	Other day types such as Rostered Days Off
Batch Job Manually Scheduled Colour	Colour the day to show when batch jobs should be manually scheduled.
Batch Job Manually Excluded Colour	Colour the day to show when batch jobs should not be scheduled.
Batch Job Automatically Scheduled Colour	


Fees Report Control
Submit
Clear
Submission
Description *
Outstanding Fees VICB
Run Type
Monthly
Print Options
Printer
(none)
Print Header Page
Add to My Reports
E-mail Report
Submission Options
Job Queue
KJSTANDARD
Monthly Schedule Options
From Date
17/11/2023
To Date
30/11/2024
Date to Run
1
Exclude Months
Manually Scheduled Dates (3 results)
Add
Calendar Date
d/MM/yyyy
Scheduling *
24/11/2023
Manually Excluded
12/12/2023
Manually Scheduled
29/11/2023
Manually Scheduled
Page 1 of 1
25 records per page
User E-mail Recipients ...
Add
User Profile
RASHY - Robyn Ashmore
Page 1 of 1
25 records per page
External E-mail Recipients ...
Add
E-mail Address
Page 1 of 1
25 records per page

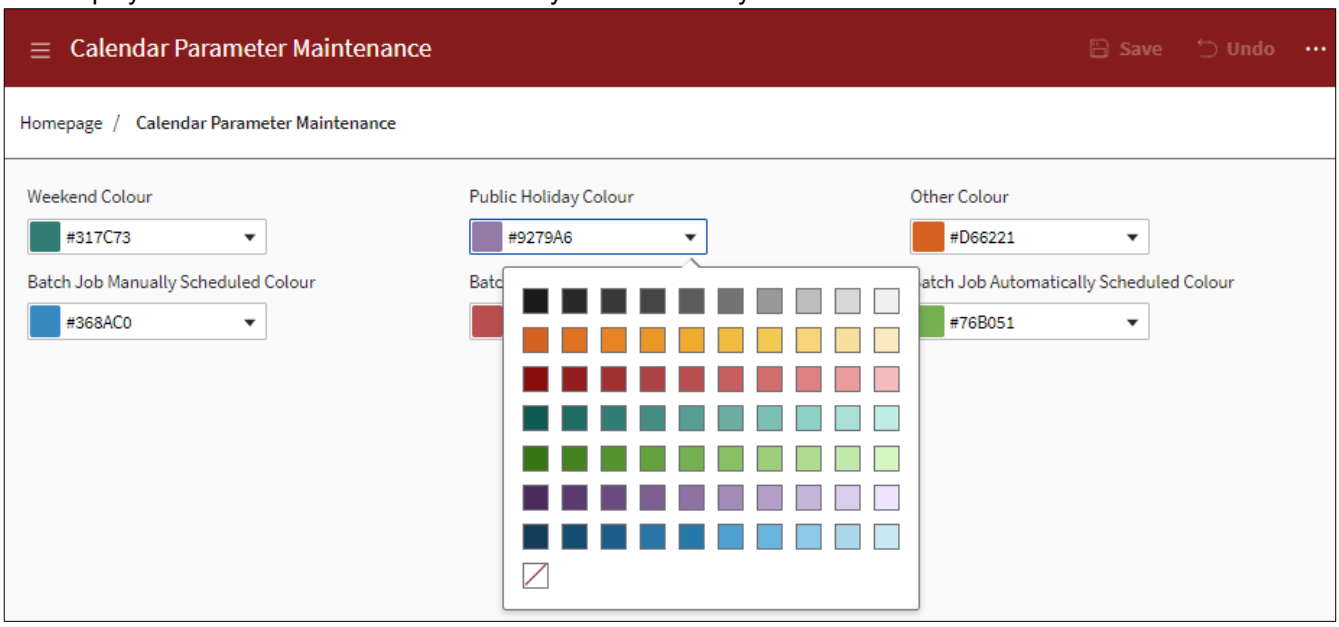


Run Type is Daily



Colour Pop Up

This displays all the available colours for use by the calendar system.



Creating Calendars

This section describes the processes required to establish and maintain various calendars for use by the system.

The steps required to establish a calendar are as follows:

- Create the calendar name e.g. Library Calendar.
- Create the Year that you wish to assign to the calendar e.g. 1998 The system will automatically generate the “days” for the year required.
- Maintain the calendar months/days to assign public holidays and other non-working days.

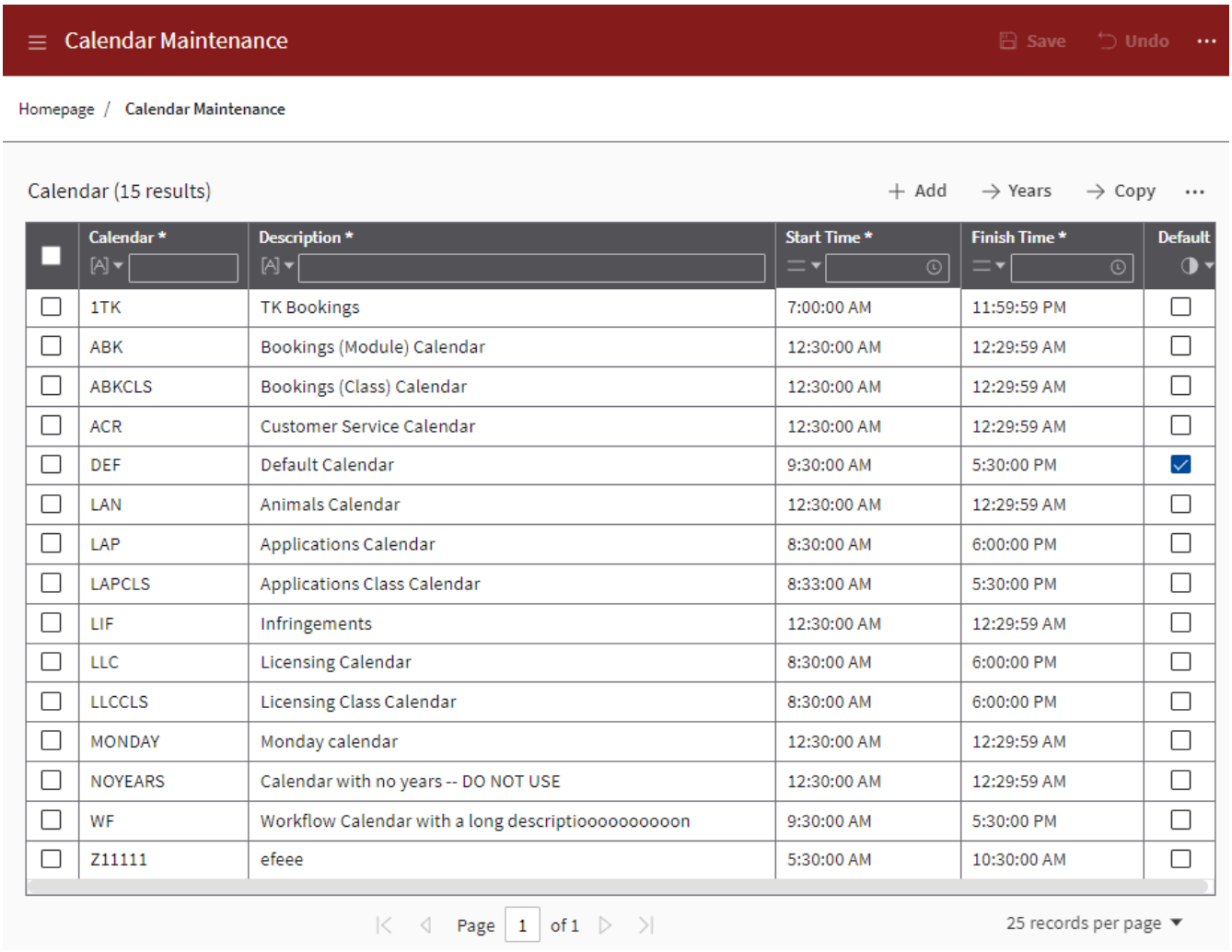
Calendar Maintenance Form

This form is used to create new calendars for use by the system. Calendars are assigned to applications where working days may vary across the organisation.

A copy function is available to copy an established calendar (and its years) to another calendar. This feature is useful when establishing new calendars. A new calendar may be created and the Years/Months/Days copied from an existing calendar.

Default Start and Finish times are available for working days. If no new times are entered by the user then it is assumed that all 24 hours in the day are working hours.

System Administration >> System Parameters >> Calendar Maintenance



Calendar
This field contains the unique code assigned to each calendar in the system.

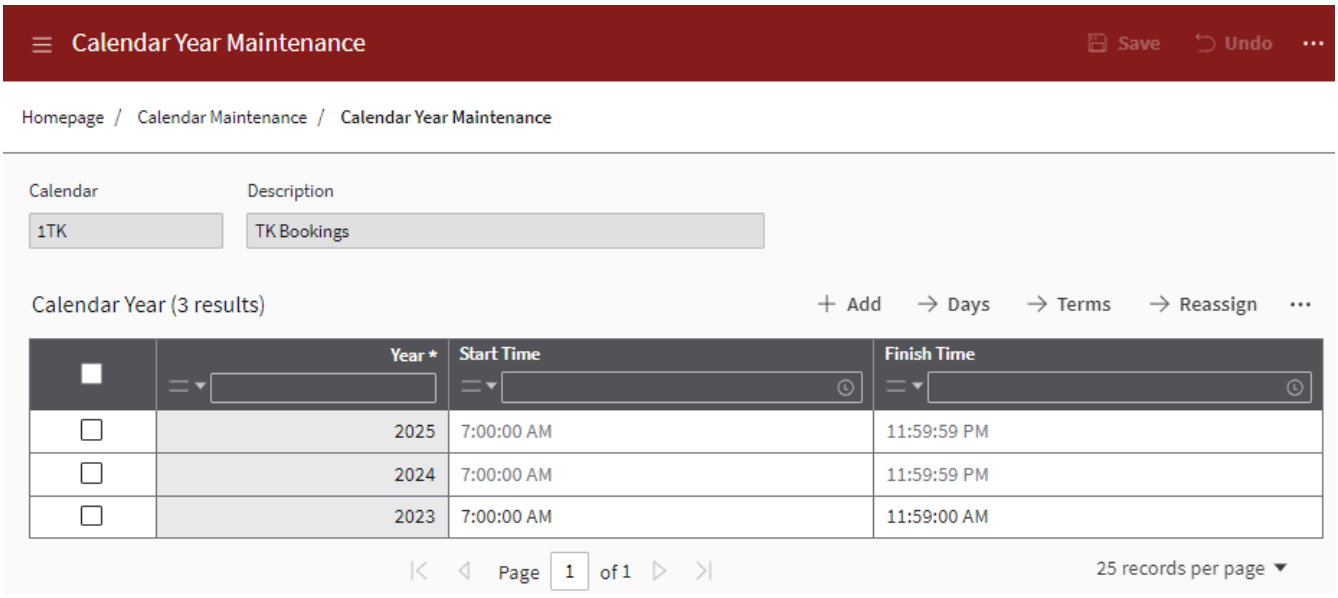
Description
This field contains the full description of the calendar name.

Start Time
The default start time is set to 00:00:00 using the format hh:mm:ss. This time can be modified by the user and applied as the new default start time for the calendar.
NOTE: Start and Finish Times only apply to working days.

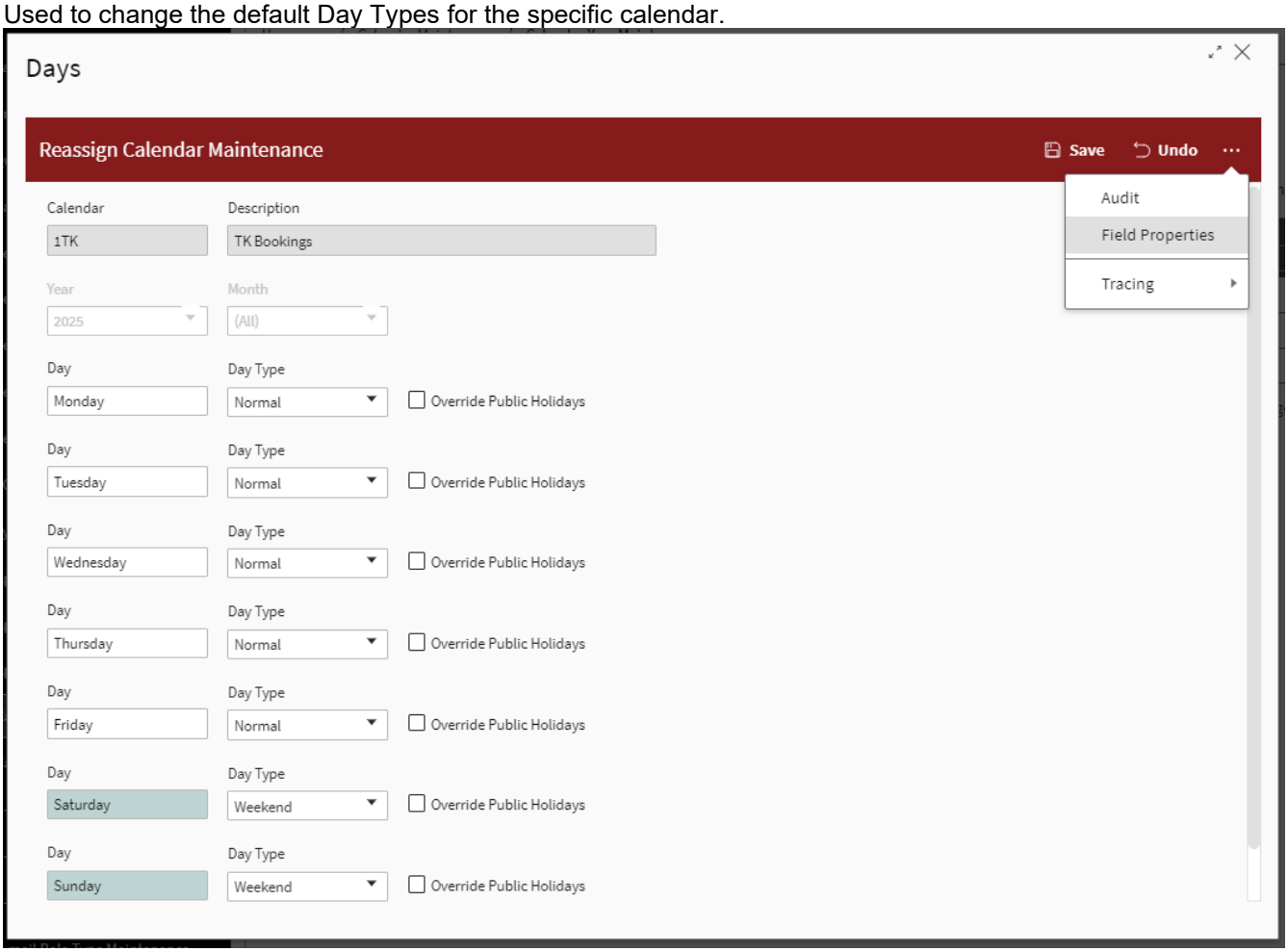
Finish Time
The default finish time is set to 00:00:00 using the format hh:mm:ss. This time can be modified by the user and applied as the new default finish time for the calendar.
NOTE: Start and Finish Times only apply to working days.

Default
If this checkbox is checked on, the calendar is defined as the default for the system. Calendars other than the default may be defined for individual applications as required.

Years Detail Button
This presents the Calendar Years Maintenance form to allow addition and removal of calendar years.



Reassign
Used to change the default Day Types for the specific calendar.



Copying Calendar Years

The Calendar Year Copy provides the facility to copy Years/Months/Days from one calendar to another.

This function allows for the copying of calendar years (and its days) from one Calendar to another. This process aids in the establishment of the calendar system.

The attributes that have been assigned to the source calendar days (i.e. Weekends, Public Holidays, Other) will be copied to the destination calendar year.

Calendar Year Copy Form

This form provides for the copying of calendar years (and its Days and Terms) from one Calendar to another.

This form is accessed via Copy on the Calendar Maintenance Form. The Source and Destination Calendars must be selected and must be different. The Year/s to be copied are selected by the check box.

When the Copy Button is pressed the selected years and days are copied from the Source Calendar to the Destination Calendar.

Source

This field contains the source calendar name. This is the calendar which you wish to copy the years from.

Destination

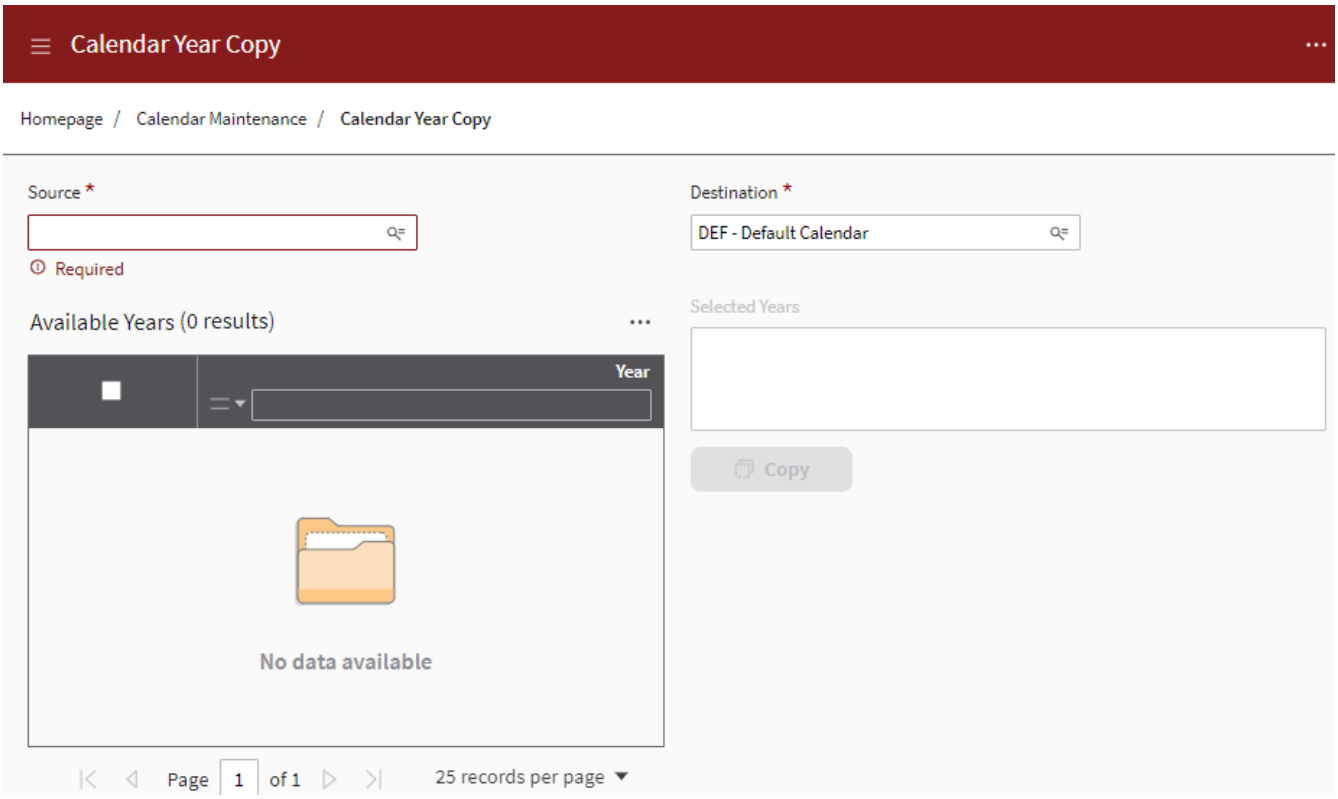
This field contains the destination calendar name. This is the calendar which you wish to copy the years to.

Source Calendar - Available Years

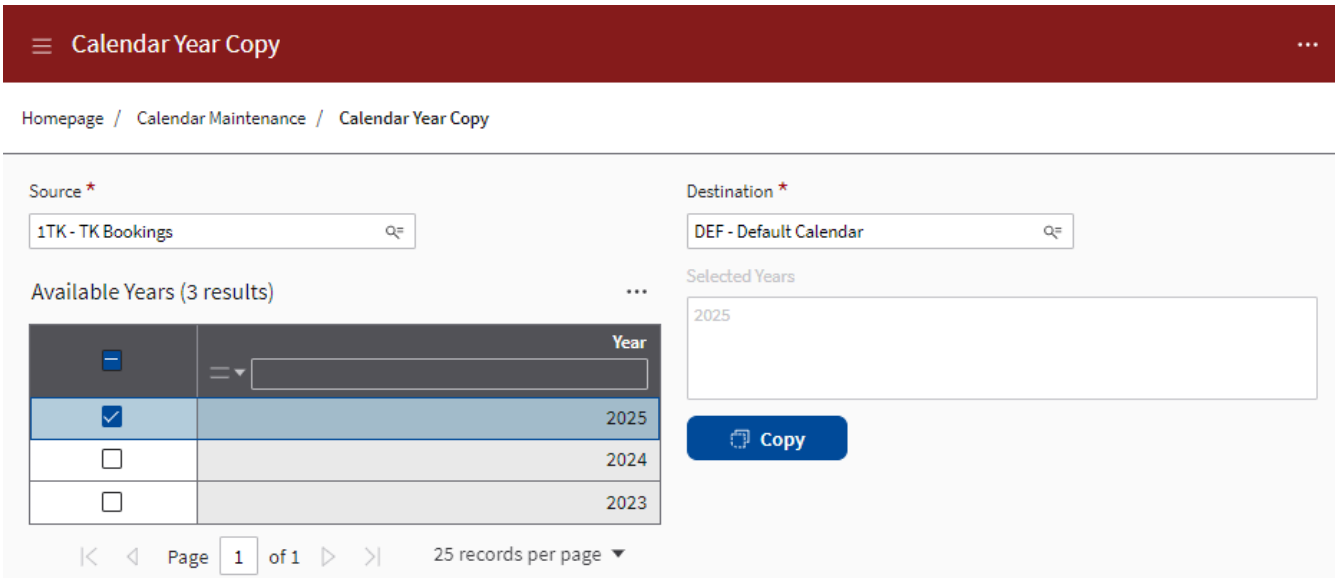
This field contains all years available for selection in the source Calendar. To choose a year to be copied click on the year and select the Select Button.

Destination Calendar - Selected Years

This field contains the Year/s nominated to be copied to the destination calendar. Click in each Year's checkbox to select the year.



The year 2025 will copied from the DEF Default Calendar to TK Bookings calendar.
NOTE: Even if 2025 exists in TK Bookings it can be copied from DEF which will overwrite the existing 2025 calendar year.

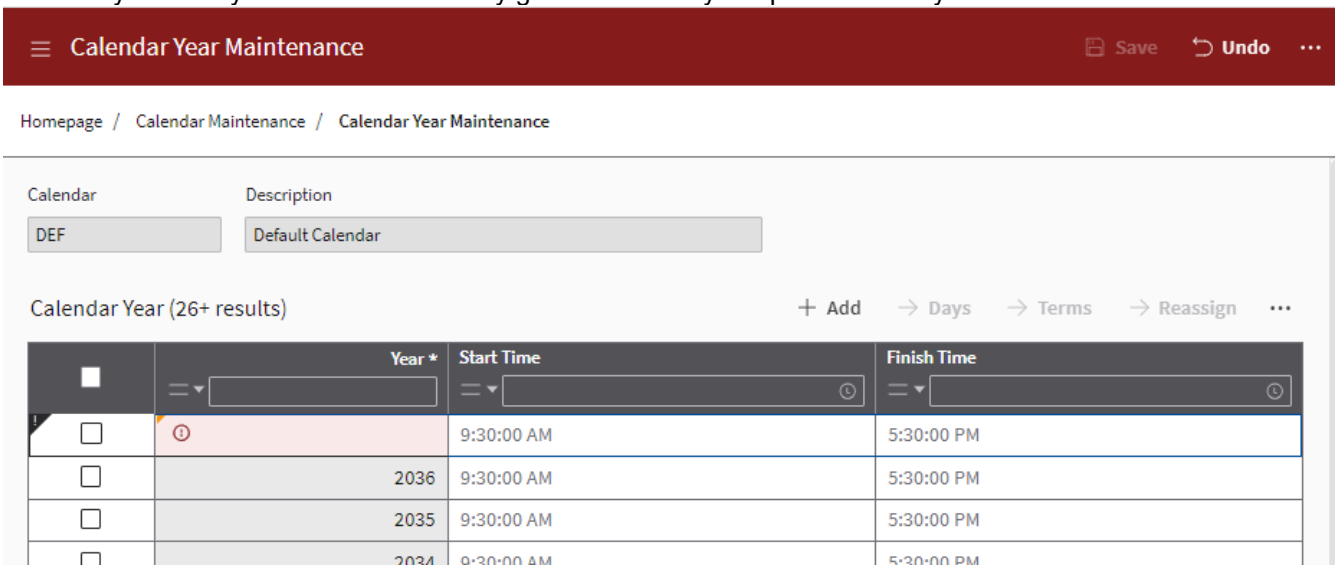


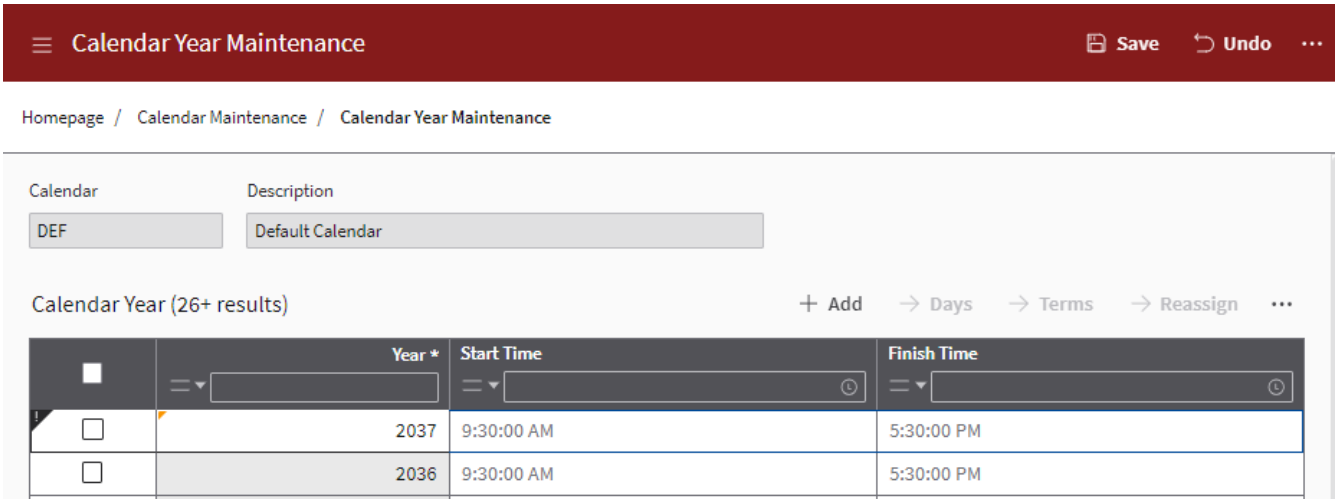
Maintaining Calendar Years

This function allows the establishment of available years for each individual calendar. It is advisable to set up any year which may be required for use in all applications. If a calendar year is not set up, then the system will use the internal date for calculating dates and weekends/public holidays will be regarded as working days.

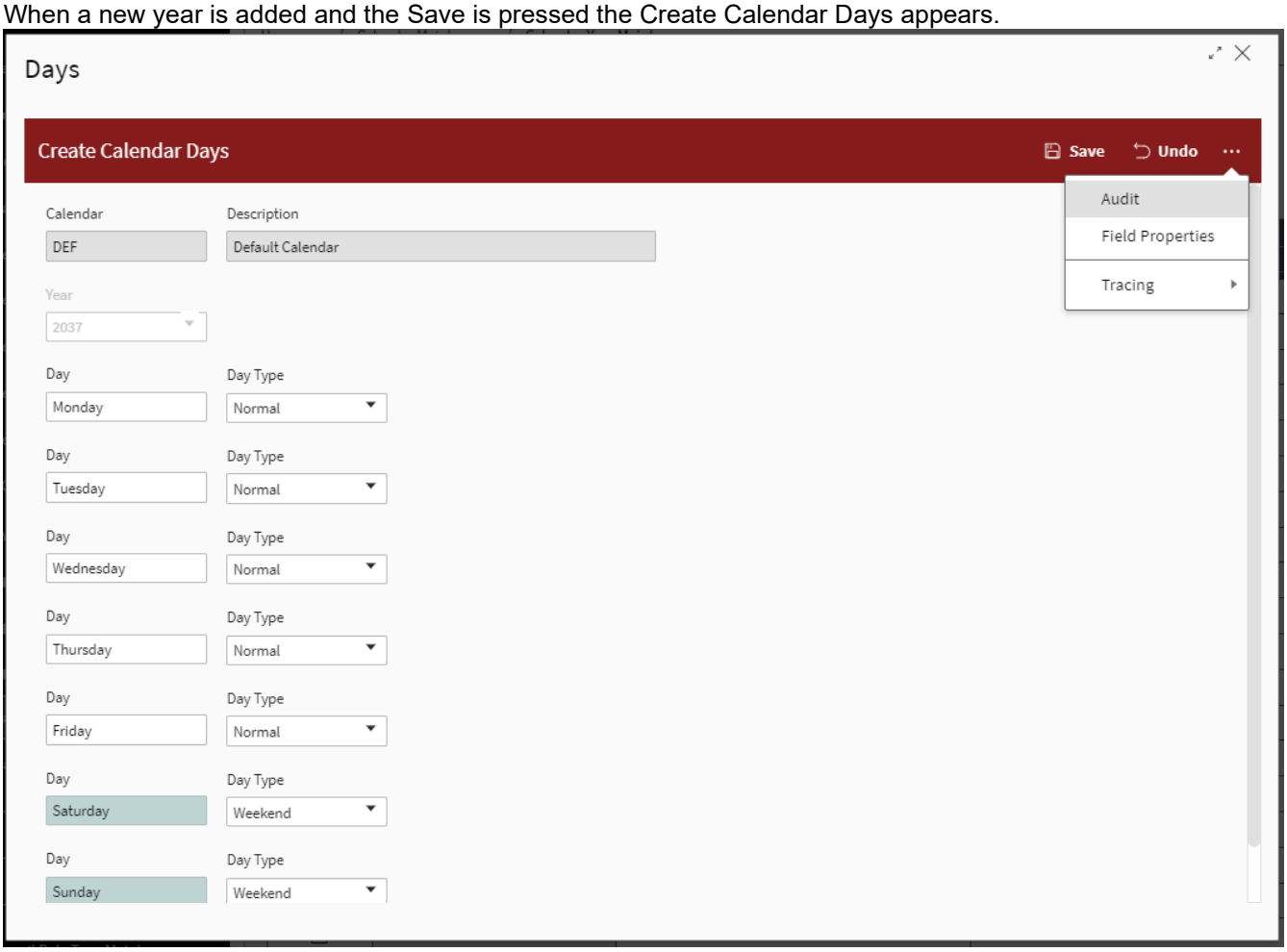
Calendar Year Maintenance

This form allows the creation and deletion of calendar years for individual calendars. When inserting a new calendar year the system will automatically generate the days required for that year.

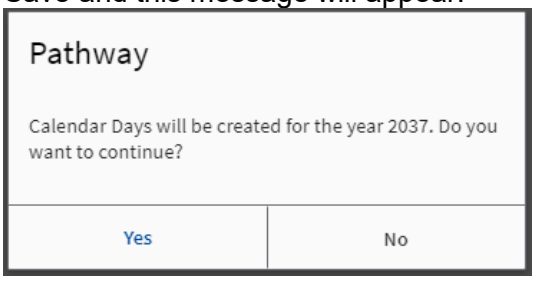




When a new year is added and the Save is pressed the Create Calendar Days appears.



You can now decide if you want to alter the any Day definitions.
Save and this message will appear.



Calendar
This field displays the name of the selected Calendar.

Year
This field contains the year relevant to the calendar being maintained.

Start Time
The default start time displays in this field. This time can be overridden for a particular year by entering a new start time. If no new values are entered then the calendar defaults will be used. The time is entered using the format: hh:mm:ss.
Note: Start and Finish times only apply to working days.

Finish Time
The default finish time displays in this field. This time can be overridden for a particular year by entering a new finish time. The time is entered using the format: hh:mm:ss.
Note: Start and Finish times only apply to working days.

Days
Pressing this button will present the Calendar Days Maintenance.

Maintaining Calendar Days

This function allows the maintenance of individual days within each calendar year.
Each day may be nominated as either a normal day, a weekend day, a public holiday or an "other" type of day.

Calendar Day Maintenance

This form allows the maintenance of individual days within each calendar year.

Calendar
This field contains the calendar which is currently being accessed. This field is display only and cannot be maintained.

Year
This field displays the calendar year that is currently being maintained. This field is display only and may not be maintained.

Month
This field contains the month that is currently being maintained. Select the month you wish to maintain days for from the drop down list.

Next/Previous Buttons
The Next and Previous buttons may be utilised to view additional months within the calendar,for the nominated year.

Calendar Day
Each day of the month is represented as an individual square on the form with the associated date within it. The colour assigned to the field represents the type of day. To change the day type position the insertion point on the appropriate day and select from the list of options in the Day Type field.

When a day type is selected this field will be updated with the colour assigned to the day type at the system level.

Public Holiday
This field displays the colour code selected to indicate Public Holidays. Colour coding is defined in Calendar Parameter Maintenance.

Weekend
This field displays the colour code selected to indicate Weekend days. Colour coding is defined in Calendar Parameter Maintenance.

Other
This field displays the colour code selected to indicate Other days. Colour coding is defined in Calendar Parameter Maintenance.

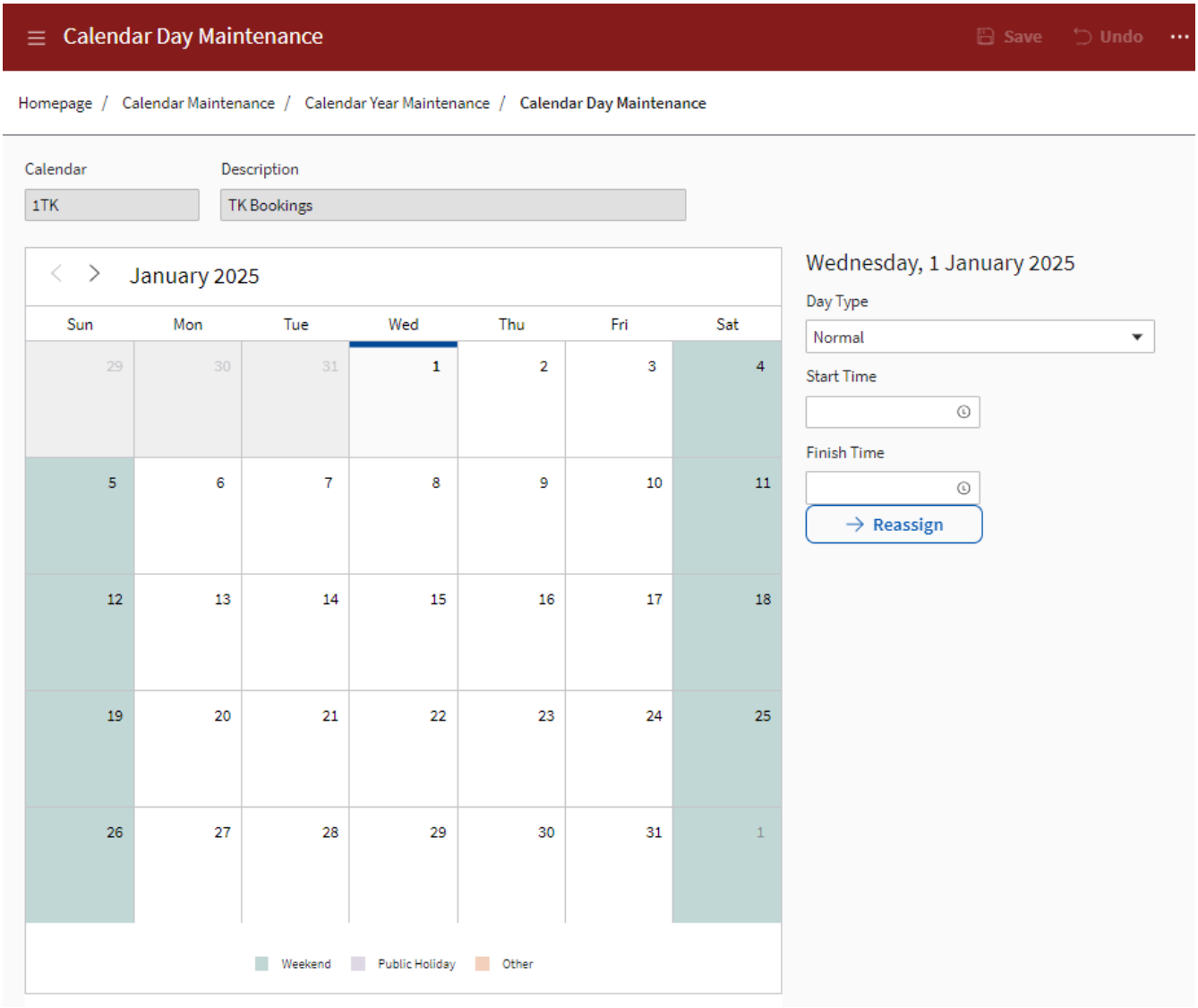
Day Type
This field enable you to nominate special days on the selected calendar. The following options are available from the drop-down list:

- Normal
- Public Holiday
- Weekend
- Other

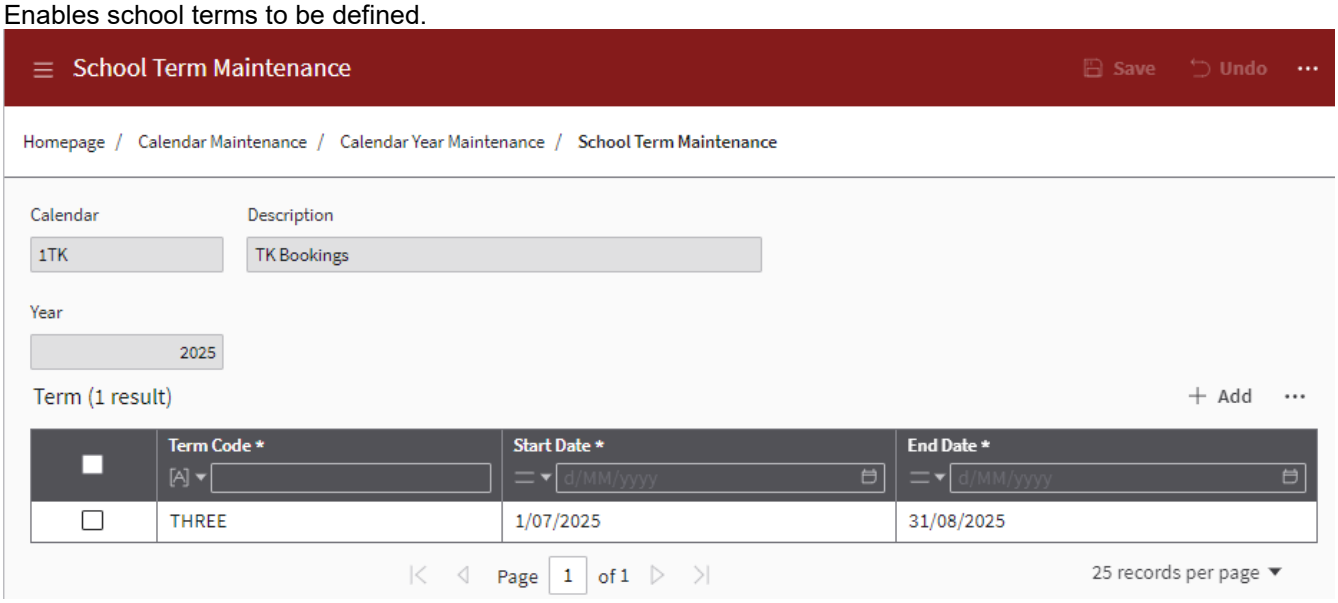
The selected days will be displayed on the calendar, in the colour previously nominated in the Calendar Colour Maintenance form.

Start Time
The default start time displays in this field. This time can be overridden for a particular day by entering a new start time. If no new values are entered, the start time defaults to the year time. If no year times exist, it defaults to the calendar time. The time is entered using the format hh:mm:ss.
Note: Start and Finish times only apply to working days.

Finish Time
The default finish time displays in this field. This time can be overridden for a particular day by entering a new finish time. If no new values are entered, the finish time defaults to the year time. If no year times exist, it defaults to the calendar time. The time is entered using the format hh:mm:ss.
Note: Start and Finish times only apply to working days.



Terms
Enables school terms to be defined.



Calendar Pop Up Form

This form contains a list of existing calendars. A calendar may be selected to apply to a particular application. The default calendar will be indicated in the list.

Calendar

This field contains the calendars which are available for selection. This field is display only and cannot be maintained.

Description

This field contains the description of each listed calendar available for selection. This field is display only and cannot be maintained.

Default

If this checkbox is checked on, it indicates that the calendar has been defined as the default.
Any calendar may be selected from the list to apply to the selected application.

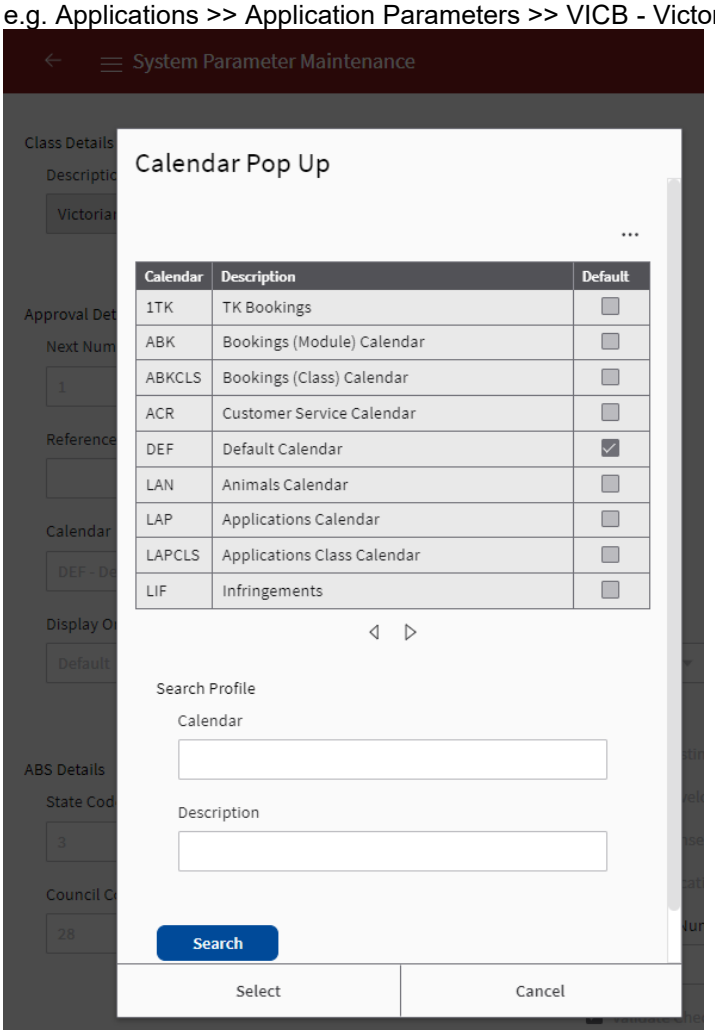
Search Profile - Calendar

Enter a Calendar code (or part thereof) on which to base your search and use the Search button to initiate the search. Wildcard searching is available on this field.

Search Profile - Description

Enter a Calendar Description on which to base your search and use the Search button to initiate the search. Wildcard searching is available on this field.

e.g. Applications >> Application Parameters >> VICB - Victorian Building, System Parameter



Date Pop Up

This enables a date to be selected for display or calculation purposes and may be accessed from any date field within the Pathway. Nominated days such as weekends, public holidays or other will be displayed in the previously nominated colour. It is also possible to nominate a Time.

Year

This field will default to the current year. The Next and Previous buttons alongside the year will enable future and previous years to be selected from the calendar. The years available will depend on the number of years which have been previously defined on the calendar in the parameters.

Next/Previous Buttons

By pressing the next/previous buttons you are able to move through previous or future years to enable the selection of a date. For example - you may wish to select an Expiry Date, 1 year into the future. The years available will depend on the number of years which have been previously defined on the selected calendar.

Month

This field will default to the current month. The Next and Previous buttons alongside the month will enable any required month to be selected from the calendar. The combination of year and month will determine the days which are available for selection.

Next/Previous Buttons

By pressing the Next/Previous buttons you are able to move through all calendar months to enable the selection of a date.

Calendar Days

Each day of the month is represented as an individual square on the form with the associated date within it. The colour assigned to the field represents the “type” of day. Highlight the required date and use the Select button to return the date to where you initiate the pop-up form from. The calendar may be re-accessed and a new date selected at any time.

Time

This field enables the time required to be nominated. The current time will be defaulted initially. Usually displayed as 24 hour clock time, the time may be adjusted to the second as required.

Public Holiday

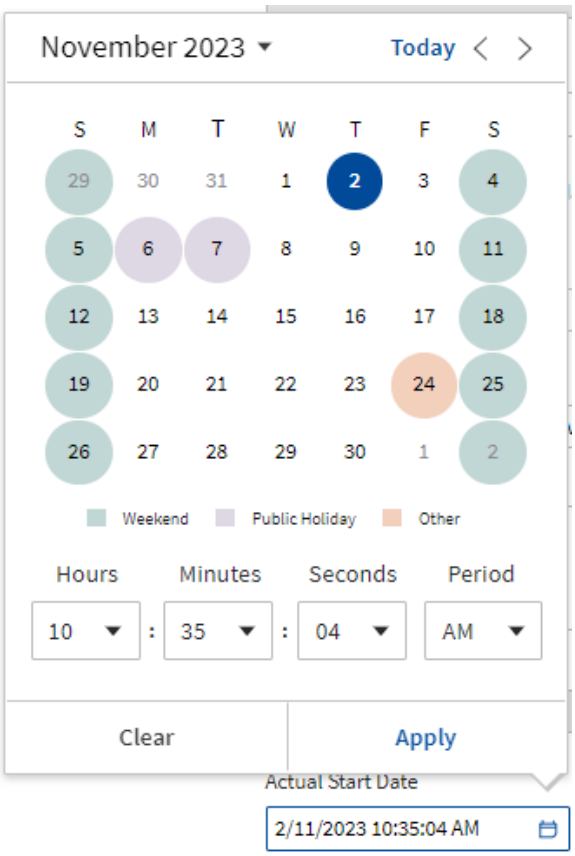
This field displays the colour code selected to indicate Public Holidays. Colour coding is defined in Calendar Parameter Maintenance.

Weekend

This field displays the colour code selected to indicate Weekends. Colour coding is defined in Calendar Parameter Maintenance.

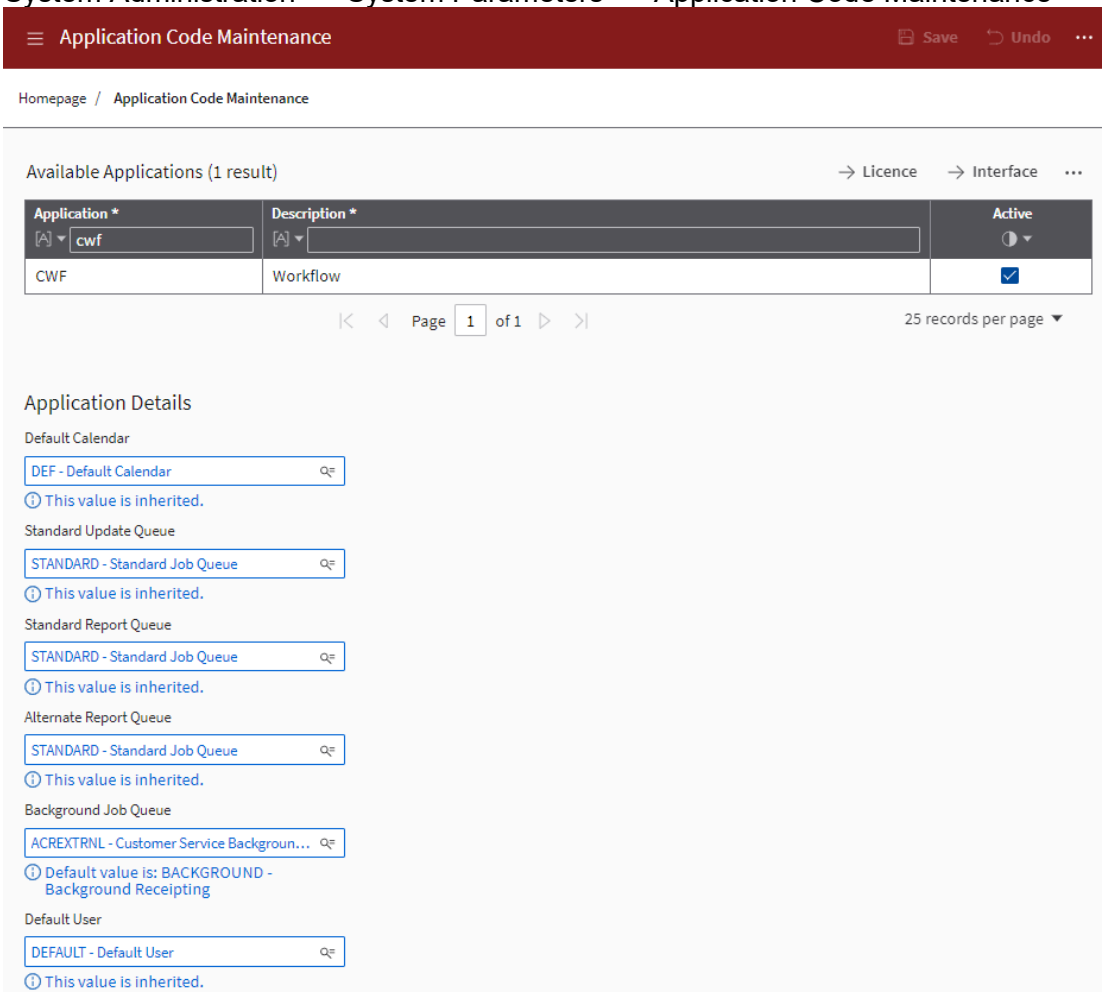
Other

This field displays the colour code selected to indicate Other days. Colour coding is defined in Calendar Parameter Maintenance.

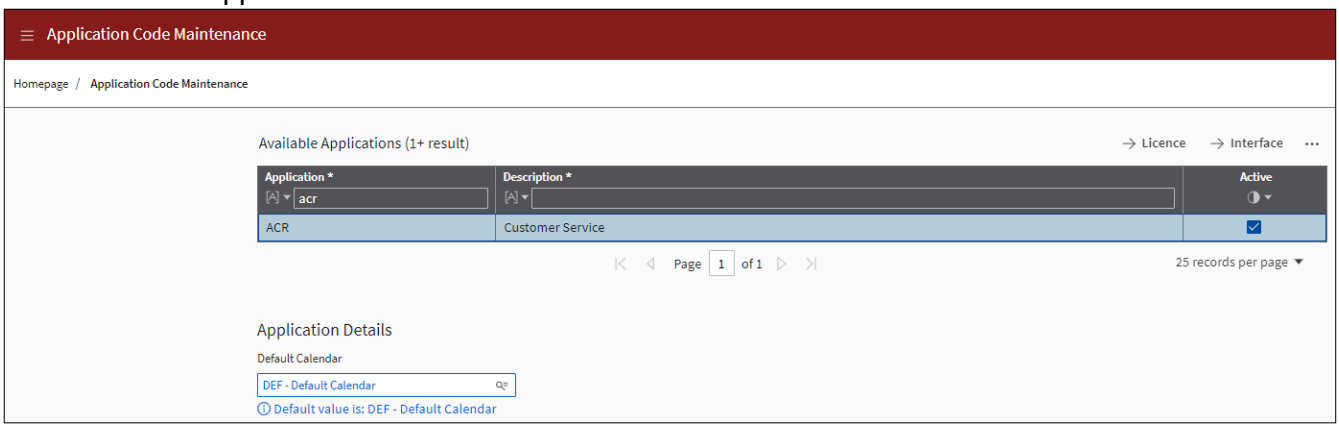


Setting up Default Calendars for Modules

System Administration >> System Parameters >> Application Code Maintenance



Default Calendar
Is set under System Administration >> System Parameters >> Calendar Maintenance.
By default this calendar is inherited by all modules listed in System Administration >> System Parameters >> Application Code Maintenance.



Calendar Hierarchy

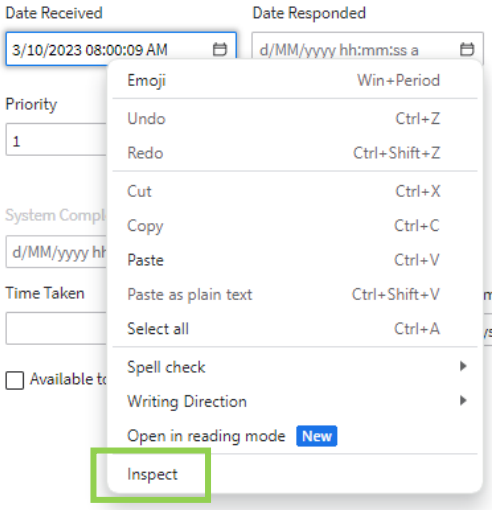
SYSTEM	Marked as the Default Calendar	System Administration >> System Parameters >> Calendar Maintenance
MODULE	Overrides System	System Administration >> System Parameters >> Application Code Maintenance
CLASS TYPE	Overrides Module and System	Class applies to Bookings, Applications and Licensing. Type applies to Customer Service Request Types.
Exceptions	Workflow - Timesheets The Calendar assigned to the Workflow Module in System Administration >> System Parameters >> Application Code Maintenance is only used for Timesheets. All other Workflow uses the calendars defined under Class/Type, Module or System.	

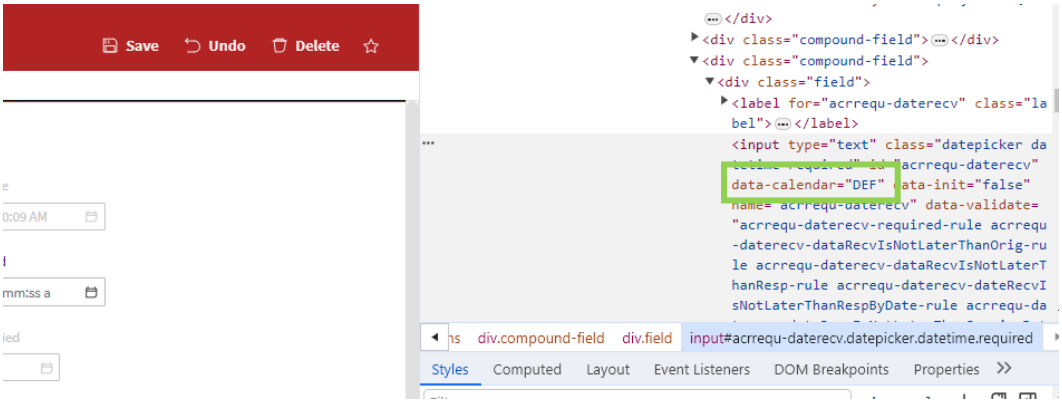
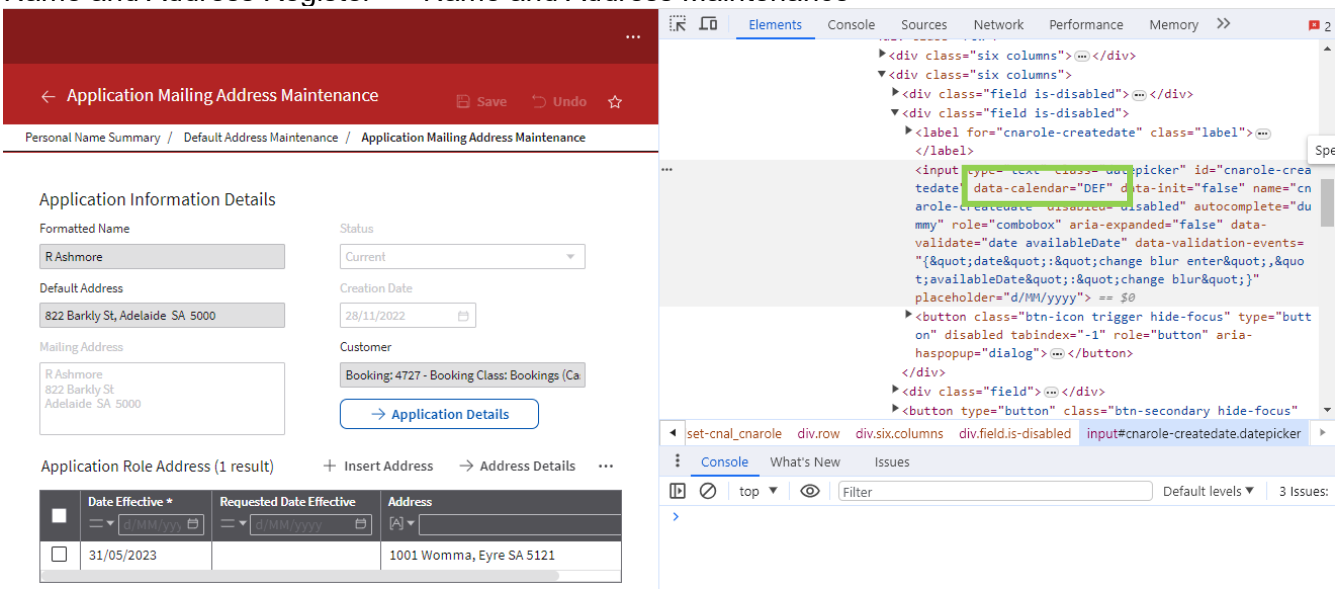
Examples
Customer Service: uses the Request Type calendar, but not defined uses the ACR Module calendar, if not defined the system Default Calendar.

Application Class: uses the Class calendar, if there's not one uses the LAP Module calendar, if not defined uses the system Default Calendar.

Troubleshooting

To find out what calendar is being used by a Date, right click on the Date field - Inspect





Name and Address Register >> Name and Address Maintenance