WORK INSTRUCTION: iTMS Year Planner & Employee Calendar:

This User Guide outlines the method used to record leave in the iTMS Employee calendar and view all leave and holidays in the Year Planner.

1. View the iTMS Year Planner

1.1. Start the iTMS program and login;

1.2. Select module 7, Personnel;

1.3. Select option C, Employee Management;

4. Select the PERSONNEL module, option 7

5. Select the EMPLOYEE MANAGEMENT, option C
1.4. The calendar displays all employee calendar entries for the current month;

6. Use key to interpret leave type

7. Resize window to reduce blank space

1.5. Filter the information displayed;

8. Select the MONTH and YEAR to view

9. Filter by POSITION TYPE or DIVISION (Workshop/Node)

11. Always click REFRESH after any selection

**Note:** Always click the REFRESH button after changing a view or filter selection.

1.6. Exiting the Year Planner

11. Click X in the top-right corner of the Year Planner to close the window

1.7. Exiting iTMS.

12. Click X to close iTMS

13. Select YES to exit
2. **Edit the iTMS Employee Calendar**

2.1. Start the iTMS program, login and open the Year Planner as detailed in sections 1.1 to 1.4 (inclusive) above.

2.2. Select an employee’s details;

   1. Right-click on the employees name and select **VIEW/EDIT DETAILS FOR** " "...

   **Note:** The lower option to **VIEW/EDIT WORK CALENDAR FOR** " " is disabled.

2.3. Open an employee’s calendar for editing;

   2. Click on the Employee’s calendar icon

2.4. Configure the leave in the selected employee’s calendar;

   3. Click on each date to configure with the selected holiday type
   
   4. Select the required holiday type from the **LEGEND**

2.5. Edit configured holiday dates;

   5. Click on each date to remove holiday type
   
   6. Deselect holiday type by clicking in **LEGEND**

2.6. Exit Employee Calendar and iTMS as detailed in sections 1.6 & 1.7 above

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3. **Edit the iTMS Year Planner**

3.1. Start the iTMS program and login as shown in section 1.1 above.

3.2. Select module C, **Utilities**;

1. Select the UTILITIES module, option C

3.3. Select option 1, **Year Planner**;

2. Select the YEAR PLANNER module, option 1

3.4. Configure generic holiday dates;

3. Select holiday type clicking in LEGEND

4. Click on each date to configure with the selected holiday type

3.5. Edit configured holiday dates;

5. Deselect holiday type by clicking in LEGEND

6. Click on dates to remove holiday
3.6. Apply configured holiday dates to Employee calendars;

7. Select OK to save configuration

8. Click YES to update all employee calendars or NO to leave calendars unaffected

3.7. Apply configured holiday dates to Workcenters;

9. Click YES to update all Workcenter availability or NO to leave Workcenters unaffected

3.8. Exiting iTMS.

13. Click X to close iTMS

14. Select YES to exit