

# 21.04. Schedules and periods

## Schedules and periods

**Schedules** are regular timeframes (e.g. monthly, fortnightly) that may be used for cyclical operations, such as program orders. There is no limit to the number of schedules.

**Periods** are specific timeframes which exist *within* schedules. Periods have a distinct start and end date. They must be sequential and must not have any overlapping dates or gaps between periods.

## Permission to add/edit schedules and periods



Schedules and periods can only be added and edited on the **central server**. Permission must be switched on for a user to perform this function.

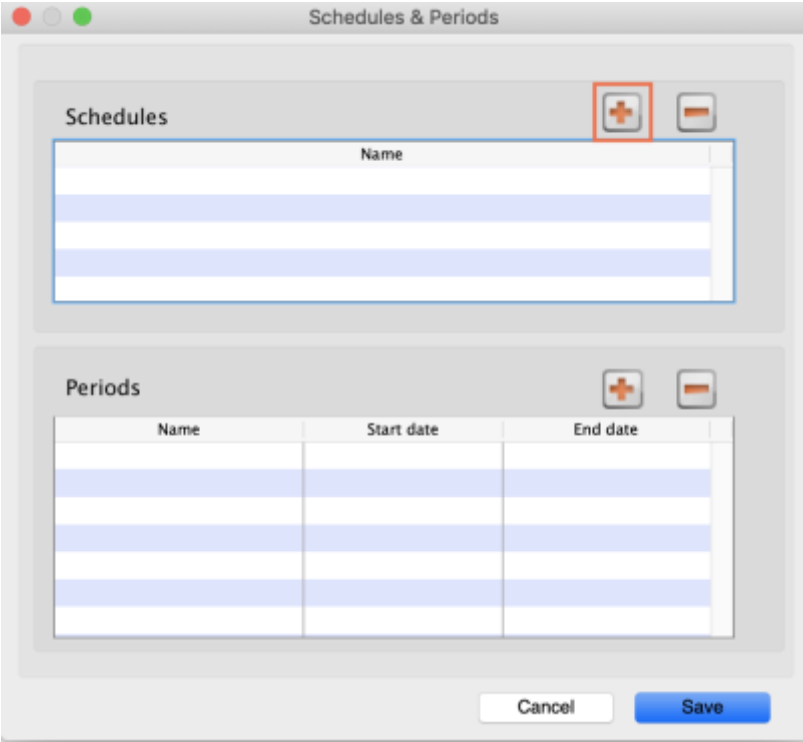
1. Go to **Admin > Edit Users >** double click the user to be edited > **Permissions**.
2. In the Admin section, check the **Edit periods and period schedules** box.
3. Click **OK**.

The screenshot shows the 'Edit user' window with the 'Permissions' tab active. The 'Admin' section contains a list of permissions, with 'Edit periods and period schedules' checked. The 'Special' section includes options for adding/editing currencies, reminders, labels, abbreviations, warnings, prescribers, transaction categories, contacts, merge prescribers, and edit options. The 'Tenders...' section has a 'Create & edit tenders' option. At the bottom, there are buttons for 'All on', 'Copy', 'Paste', 'Delete', 'Cancel', and 'OK'.

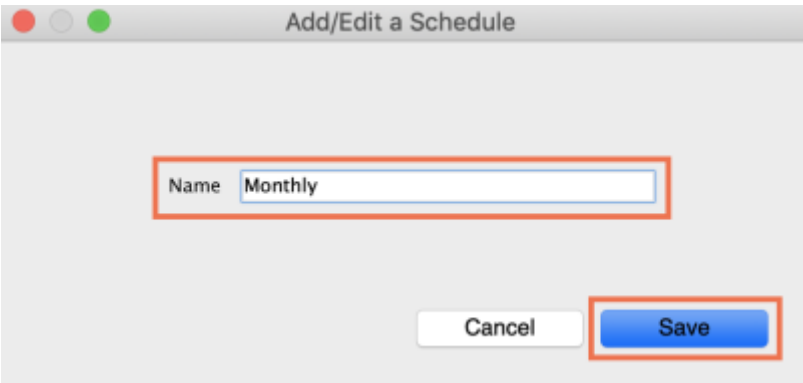
## Adding schedules and periods

1. In the menu bar, click **Special** then **Periods...**

2. To create a new schedule, click the plus icon next to **Schedules**.



3. Name the schedule and click **Save**.



4. To add periods within a schedule, highlight the schedule and click the plus icon next to **Periods**.

**Schedules & Periods**

**Schedules**

Name
Fortnightly
Monthly

**Periods**

Name	Start date	End date

Cancel Save

5. Name the period, enter its start and end dates, then click **Save**. You can type dates in the boxes or click the icon to select dates from the calendar.

**Add/Edit a Period**

Schedule: Monthly

Name: January 2020

From: 1/1/20 To: 31/1/20

Cancel Save

6. Keep adding all the periods within the schedule. If necessary, you can edit a period by double clicking on it.

7. When you are finished, click **Save**.



**Once a schedule has been saved, it CANNOT be edited.**

Check closely before clicking the final **Save** button!

Schedules & Periods

Schedules

Name
Fortnightly
Monthly

Periods

Name	Start date	End date
January 2020	1/1/20	31/1/20
February 2020	1/2/20	29/2/20
March 2020	1/3/20	31/3/20
April 2020	1/4/20	30/4/20
May 2020	1/5/20	31/5/20
June 2020	1/6/20	30/6/20
July 2020	1/7/20	31/7/20

Cancel

Save

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