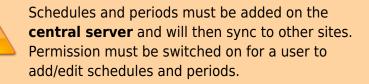
21.04. Schedules and periods

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



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**.

General Permissions (2) Permissions (3) Login rights Details Dashboard Ordering Adirvin Adirvin Adirvin Adirvin View purchase orders Create purchase orders Adirvin Adirvin Edd purchase orders Create field field containers Edd in advortises Edd in advortises Edd purchase orders Create field field containers Edd in advortises Edd in advortises Finalise purchase orders Daplicate purchase orders Edd in advortises Edd in advortises Finalise purchase orders Daplicate purchase orders Edd in advortises Edd in advortises Finalise purchase orders Daplicate purchase orders Edd in advortises Edd in advortises News Create exections Edd in inventory adjustments Edd in advortise goods received View investory adjustments Edd in inventory adjustments Invalide goods received Daplicate items View cost prices of stock Inventory adjustments Invalide goods received Daplicate items Edd item namese, codes and units Add / edd in reminders Add / edd in reminders	User	Admin			:	Store: Gene	ral Warehouse
View purchase enders Create punchase orders Add / edit users Delete punchase orders Confirm punchase orders Access server administration Edit punchase orders Create de edit backonders Edit authoritiers Edit punchase orders Create de edit backonders Edit authoritiers Edit punchase orders Depletate punchase orders Edit factores Manage tenders Edit & deletite quortiss Clone database Authoritie punchase orders Dupletate punchase orders Edit linewithers Authoritie punchase orders Prioritip punchase orders Edit linewithers Rems View inwettery adjustments Edit linewithers adjustments Edit nems Edit linewithers adjustments Edit linewithers adjustments Edit nems View cost prices of stack Finalise gloods received Duplicate items Edit linewithers and units Add / edit carrencies Edit repacks Manage item access Madd / edit reminkers Edit nem inactive Add / edit reminkers Add / edit reminkers Edit nem inactive Add / edit reminkers Add / edit reminkers Edit nem inactive Add / edit reminkers Add / edit reminkers <th>Ge</th> <th>neral Permission</th> <th>Permissions (2)</th> <th>Permissions (3)</th> <th>Login rights</th> <th>Details</th> <th>Dashboard</th>	Ge	neral Permission	Permissions (2)	Permissions (3)	Login rights	Details	Dashboard
Delete purchase orders Confirm purchase orders Access server administration Bit purchase orders Create is with backotders Edit addortiers Bit purchase orders Conse is with backotders Edit addortiers Manage tenders Edit is deline quotes Edit isocrate graviders Manage tenders Edit isocrate graviders Edit isocrate graviders Manage tenders Daplicate purchase orders Edit isocrate graviders Manage tenders Print purchase orders Edit isocrate graviders Rems Create new items View inventory adjustments Add (edit goods received Orlease tierms Edit isocrate graviders Finalise goods received Delete items Edit isocrate graviders Special Oreate repacks or split stock View of print adorts for items Add / edit reminders Edit repacks Manage isograve action groups Add / edit reminders View pricing information for items Manage isograve <td< td=""><td>Ordering</td><td></td><td></td><td></td><td></td><td>Admin</td><td></td></td<>	Ordering					Admin	
Edit purchase orders Create & edit backonders Edit authoritiers Edit purchase orders Create mergradens Clone database Finalise purchase orders Duplicate purchase orders Edit isoarance prevides Finalise purchase orders Duplicate purchase orders Edit isoarance prevides Create mergrades Prim purchase orders Edit isoarance prevides Create mergrades Prim purchase orders Edit isoarance prevides Create mergrades Wew inventory adjustments Cools receiving Edit isoarance orders View inventory adjustments Authorities goods received Edit isoarance orders View inventory adjustments Finaline goods received Edit isoarance orders View inventory adjustments Finaline goods received Edit isoarance orders View cost prices of soskit Finaline goods received Deplicate repacks or split stock View inventory adjustments Finaline goods received Edit isoarance orget is formation for items Manage isoarance orget and units Special Oreate repacks or split stock Wiew DDD information for items Add / edit carrencies Edit isoarance iso it devising stock Manage isoarance Add / edit reminders	View pure	hase orders	- Cr	sate purchase orders		Add / edit	U58/5
Edit purchase order pricing Drate new quotes Clone database Marage tenders Edit & delite quotes Edit issuance prevides Marage tenders Edit & delite quotes Edit issuance prevides Authorise purchase orders Diplicate purchase orders Edit issuance prevides Authorise purchase orders Prior purchase orders Coold receiving Items Order new items View inventory adjustments Add (edit quotes received Edit issuance of split stock View coot prices of stock Special Duplicate items View coot prices of stock Special Edit regarks Manage item access View add (edit quotes received Edit regarks Manage item access View animits bit Merge two items Make item inactive Add / edit reminders Add / edit reaction stock View stock Add / edit carrencies Add / edit reminders Edit item inactive Add / edit reminders Add / edit reminders Edit item inactive Add / edit reminders Edit item edits bit Edit item inactive Add / edit reminders Manage item access Edit item edits at price Add / edit reminders	Delete pu	rchase orders	Co	nfirm purchase orders		Access ser	ver administration
Manage tenders Edit & delite quotes Edit issurance previders Manage tenders Daplicate purchase orders Edit issurance previders Namise purchase orders Print purchase orders Cools receiving Rems Cools receiving Cools receiving Oreate new items Exter inventory adjustments Add (edit goods received Delite items Exter inventory adjustments Add (edit goods received Delite items Exter inventory adjustments Add (edit goods received Delite items Exter inventory adjustments Finalise goods received Create repacks or split stock View DDD information for items Add / edit currencies Edit item namese, codes and units Special Edit reminders View pricing information for items Manage item reaces Add / edit reminders Edit item namese, codes and units Add / edit reminders Add / edit reminders Edit item naction Manage item reaces Add / edit	Edit purch	use orders	C Cr	sate & edit backorders		Edit autho	risers
Finalise parchase orders Dapkate parchase orders Ext pendoa and pend sche Authorise parchase orders Prim parchase orders Cools receiving Items Cools receiving View goods received Croate eveltens Displicate interns Authorise parchase orders Displicate items View inventory adjustments Authorise goods received Edit pendoa Authorise parchase orders Primation or parcel state Displicate items View cost prices of state Primative goods received Displicate items View cost prices of state Special Create repacks or split stock View DDD information for items Add / edit carrencies Edit item access View adjustments Add / edit carrencies Edit item of its for Manage item access Add / edit carrencies Marage item intactive Add / edit abeviations Add / edit abeviations Marage item intactive Add / edit abeviations Add / edit anametion carego Modify usil and cost prices of isosic View stock Add / edit careaction carego Add / edit manaction carego Add / edit apprices Add / edit careaction carego Add / edit mastorer Coolsfate stock	Edit purch	use order pricing	C Cr	rate new quotes		Clone data	base
Authorise purchase orders Prim purchase orders Items Cools received Create new items Use invertory adjustments Edit nems Edit invertory adjustments Edit invertory adjustments Add/edit goods received Deficie items Edit invertory adjustments Deficie items Edit invertory adjustments Deficie items View cost prices of stock Duplicate items Edit invertory adjustments Edit invertory adjustments Inaline goods received Deficie items View cost prices of stock Create regacks Wanage item access View pricing information for items Manage item access Made item inactive Add / edit meninders Edit item inactive Add / edit manaction camp Add / edit manaction stock View atomins Madify sell and cost prices of existing stock View atomic Modify sell and cost prices of existing stock View atomic Add / edit maaction camp Add / edit centaris Modify sell and cost prices of existing stock View atomic Add / edit rearger istic Edit stock Create and edit cautom stock field nalue lines Ed						Edit insura	ince providers
Items Cools receiving Create new items View inventory adjustments Add (edit goods received View items Exter inventory adjustments Add (edit goods received Edit items Edit item namee, codes and units Finaline goods received Dublete items Edit item namee, codes and units Special Create repacks or split stock View DDD information for items Add / edit reminders Edit item namee, codes and units Special Special View pricing information for items Manage item reacess Add / edit reminders Edit item names, codes and units Manage item reacess Add / edit reminders View pricing information for items Manage item reacess Add / edit reminders View pricing information for items Manage item reacess Add / edit reminders Merge two items Male item instathe Add / edit reminders Add / edit masters Edit item default price Add / edit warnings Add / edit masters Consolidate stock Add / edit remamation cating Add / edit masters Edit item default price Add / edit itematesten cating Add / edit masteri				,		2 Edit period	ts and period schedules
Items View investory adjustments View goods received Create new items Exter investory adjustments Add (edd goods received Edd items Exter investory adjustments Add investor goods received Delite items View cost prices of stack Finaline goods received Duplicate items Edd items names, codes and units Special Create regarks of split stock Www DOD information for items Add / edit reminiders Edit keen inactive Manage item access Add / edit reminiders Edit keen inactive Madd / edit reminiders Add / edit reminiders Edit keen inactive Add / edit reminiders Add / edit reminiders Edit keen inactive Add / edit reminiders Add / edit reminiders Made item inactive Add / edit reminiders Add / edit reminiders Modify sell and cost prices of existing stock Were stock Add / edit reminiders Modify sell and cost prices of existing stock Were stock Add / edit remaction camp Add / edit reastor Edit items intactive Add / edit reminiders Modify sell and cost prices of existing stock Were and price perisoriters Add / ed	Authorise	purchase orders	Pri	nt purchase orders		Sonds receivin	ia.
Create new ittems View inventory adjustments Add/edit goods received View items Enter inventory adjustments Authoritie goods received Edit items Edit itemsmory adjustments Authoritie goods received Duplicate items Wew cost prices of stock Special Duplicate items Wew cost prices of stock Special Create repacks or split stock Wew DOD information for items Add / edit correncies Edit item names, codes and units Special Special Create repacks or split stock Wew DDD information for items Add / edit reminders Edit item anits is Manage item access View and print labels View pricing information for items Manage locations Add / edit reminders Edit item anits list Manage locations Add / edit reminders Merge two items Malke item inactive Add / edit abbreviations Add / edit neasons Creasiliate stock Add / edit remansings Add / edit neasons Creasiliate stock Add / edit cortacts Markge rescribers Add / edit cortacts Edit item default price Add / edit rescribers Add / edit cortacts Edit item default price	lems					Max cood	a completed
View Items Exter inventory adjustments Authoritic goods received Edit Items Edit Items adjustments Intalline goods received Delete Items View cost prices of stock Intalline goods received Deplete Items View cost prices of stock Special Create repacks or split stock View COD Information for Items Add / edit reminders Edit Item names, codes and units Manage Item access Add / edit reminders Edit Item names, codes and units Manage Item access Add / edit reminders Edit Item names, codes and units Manage Item access View and print labels View pricing information for items Manage Item access View and print labels View pricing information for items Manage Item access Add / edit reminders Add / edit opartnerms Edit Item default price Add / edit warnings Add / edit namesting stock Add / edit remanesten carting Add / edit remanesten carting Add / edit mamesting stock Add / edit remanesten carting Add / edit remanesten carting Add / edit mamesten Edit stock Add / edit remanesten carting Add / edit restorts Edit stock	Create ne	witems	C Vie	w inventory adjustments	. 2		
Edit: Inventory adjustments Finaline goods received Defete items View cost prices of stock Special Duplicate items Edit item names, codes and units Add / edit correncies Create reparks Special Add / edit correncies 6/8 reparks Manage item access Add / edit correncies 6/8 reparks Manage item access Add / edit correncies 6/8 reparks Manage item access Add / edit reminiders 6/8 reparks Manage item access Add / edit reminiders 6/8 reparks Manage item access Add / edit reminiders 6/8 reparks Manage item inactive Add / edit reminiders 6/8 reparks Manage item inactive Add / edit reminiders 6/8 reparks Make item inactive Add / edit reminiders 6/8 reparks Make item inactive Add / edit remaction camp 6/8 reparks Edit item of editing stock Add / edit remaction camp 6/8 reparks Consolidate stock Add / edit contactions Modify vali and cost prices of existing stock Add / edit contacts 6/8 reparks Edit items of existing stock Add / edit contacts 6/8 reparks Add / edit contacts Edit items of existing stock Modify vali and cost prices of existing stock Add / edit contact	Vev item	1	C te	er inventory adjustment			
Delete items View cost prices of stock Special Duplicate items Edit teen names, codes and units Add / edit carrencies Create repacks or split stock View DDD information for items Add / edit carrencies Edit repacks Waw DDD information for items Add / edit carrencies Edit repacks Manage item access View and pint labels View pricing information for items Manage locations Add / edit reminders Edit tem units list Manage locations Add / edit reminders Marage trainaction groups Add / edit reminders Add / edit reminders Marage trainaction groups Add / edit respectations Add / edit reminders Marage trainaction acreation Add / edit ramation carrent Add / edit ramation carrent Mad y edit repacts Edit item default price Add / edit ramation carrent Mad y edit mascer itist View stock Add / edit remation carrent Add / edit ramation carrent Edit item default price Add / edit remation carrent Add / edit ramation carrent Edit item default price Add / edit remation carrent Add / edit cartencare Edit item default price	Edit items		Ed	t Inventory adjustments			
Duplicate Herrs Eait Herr Names, codes and units Croate repacks or split stock View DOD information for Items Add / edit correncies Orield repacks Manage Item access View and print labels View pricing information for items Manage Item access View and print labels Edit repacks Manage Item access View and print labels Edit repacks Manage Item access View and print labels Edit repacks Manage Item access View and print labels Edit repacks Manage Item access View and print labels Edit Rem units list Manage Item access Add / edit rescriptors Add / edit reparationers Add / edit reparations Add / edit reparations Made Item in default price Add / edit runnaction carege Add / edit runnaction carege Add / edit runnaction of existing stock Consolifiate stock Add / edit runnaction carege Add / edit runnaction stock field value lists Edit stock Add / edit reprints	Delete ite	ms	- Vie	w cost prices of stock		-	
Oreate repacks or split stock View DDD information for items Add / efit carrencies Edit repacks Manage item access Add / edit carrencies Edit repacks Manage item access Add / edit reminders View pricing information for items Manage item access Add / edit reminders Edit repacks Manage item access Add / edit reminders Marage item access Add / edit reminders Add / edit reminders Marage item access Add / edit reminders Add / edit reminders Marage item inactive Add / edit reminings Add / edit remaction carege Add / edit remines Edit item default price Add / edit remaction carege Modify sell and cost prices of existing stock Add / edit centacts Add / edit centacts Add / edit remaction carege Add / edit centacts Edit stock Add / edit centacts Create and edit castom stock field value lists Modify donor on stock and Add add experimers	Duplicate	itero	C 64	t item names, codes and	funits S	ipecial	
Edit respacks Manage item access View and print labels View pricing information for items Manage drug interaction groups Add / edit neisc labels Edit item units list Manage locations Add / edit neisc labels Merge two items Make item inactive Add / edit abbreviations Add / edit objectments Edit item default price Add / edit prescribers Modify uell and cost prices of existing stock Edit item default price Add / edit coetacts Add / edit in readering stock View stock Add / edit coetacts Edit item and edit reastor stock field value lists Edit stock Merge prescribers	Create res	acks or split stock	- We	w DDD information for i	terns		
View pricing information for items Manage drug interaction groups View and print labels Edit item units list Manage locations Add / edit inits Labels Edit item units list Manage locations Add / edit inits Labels Merge two items Make item initative Add / edit warnings Add / edit departments Edit item default price Add / edit manaction canege Modify usell and cout prices of existing stock Coessifiate stock Add / edit contacts Add / edit masseer list Edit items Edit items Add / edit contacts Edit item and edit cautors stock field value lists Edit items Add / edit contacts Merge prescribers	Edit repar	ks	- Ma	nage item access			
Edit item units list Add) edit mick laters Manage locations Add) edit mick laters Merge two items Make item inactive Add / edit abbreviations Add / edit bibreviations Add / edit dipartments Edit item default price Add / edit cost prices of existing stock Coressiliate stock Add / edit reazers Edit item default price			s 🗆 Ma	nage drug interaction gr	0401		
Marge two items Make item inactive Add / edit warnings Add / edit departments Edit item default price Add / edit prescribers Modify sell and cost prices of existing stock Cossolidate stock Add / edit tranaction caneg Modify sell and cost prices of existing stock Way stock Add / edit tranaction caneg Add / edit reason Verv stock Add / edit coetacts Edit stock Edit stock Add / edit coetacts Edit stock Edit stock Add / edit coetacts Create and edit castom stock field value lists Modify down on stock and Add and edit coetacts				mage locations			
Add / edit departments Edit item default price Add / edit prescribers Modify sell and cost prices of existing stock Coresoleflate stock Add / edit transaction catego Add / edit masser list View stock Add / edit centacts Create and edit custom stock field value lists Modify donor on stock and Add and edit explores			- M	ke item inactive			
Modify sell and cost prices of existing stock Consolidate stock Add / edit transaction catege Add / edit masser list Verw stock Add / edit contacts Create and edit custom stock field value lists Modify donor on stock and Add and edit oppiers			6	t item default price			
Add / edit master list View stock Add / edit contacts Edit stock Edit stock Merge prescribers View field walker lists Middly down on stock and Add and edit explores			ting stock 0	esolidate stock			
Create and edit custom stock field value lists Modify donor on stock and Add and edit options				w stock			
Modify donor on stock and Add and edit options				it stock		Merge pres	scribers
transaction lines	Create an	d edit custom stock Rel	Mic	dify donor on stock and nsaction lines		Add and e	dit options
Supplier invoices with issued stock Tenders	iupplier invo	ices with issued stock			1	Fenders	
Update pack size, cost and sell price Create & edit tenders	Update pa	ick size, cost and sell p	ice			Create & ed	it tenders

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**.

	Schedules & Periods		
Schedules		۲	
	Name		
Periods		+	-
Name	Start date	End date	
		Cancel	Save

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

	Add/Edit a	Schedule	
Name	Monthly		
		Cancel	Save

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

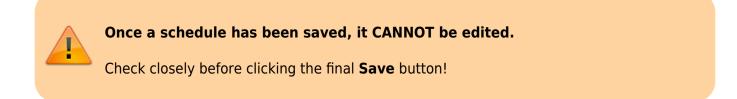
	Schedules & Periods		
Schedules		+	-
	Name		
Fortnightly			_
Monthly			
Periods		•	-
Periods Name	Start date	End date	-
	Start date		
	Start date		
	Start date		-
	Start date		

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	
Sc	hedule	Monthly	٥
	Name	January 2020	
	From	1/1/20 🔳 To 31/	1/20
		Can	cel 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**.



Schedules		🕂 💻
	Name	
Fortnightly		
Monthly		
Periods		
Periods		•
Periods Name	Start date	End date
	Start date 1/1/20	
Name		End date
Name January 2020	1/1/20	End date 31/1/20
Name January 2020 February 2020 March 2020	1/1/20 1/2/20	End date 31/1/20 29/2/20
Name January 2020 February 2020	1/1/20 1/2/20 1/3/20	End date 31/1/20 29/2/20 31/3/20
Name January 2020 February 2020 March 2020 April 2020	1/1/20 1/2/20 1/3/20 1/4/20	End date 31/1/20 29/2/20 31/3/20 30/4/20

Previous: 21.03. mSupply client / server installation part 3 | | Next: 21.05. Web browser access via TSPlus

From: https://docs.msupply.org.nz/ - **mSupply documentation wiki**

Permanent link: https://docs.msupply.org.nz/admin:schedules_periods?rev=1572962891



Last update: 2019/11/05 14:08