

# 21.05. 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 and highlighted. Other permissions include 'Add / edit users', 'Access server administration', 'Edit authorisers', 'Clone database', and 'Edit insurance providers'. The 'Goods receiving' section includes 'View goods received', 'Add/edit goods received', 'Authorise goods received', and 'Finalise goods received'. The 'Special' section includes 'Add / edit currencies', 'Add / edit reminders', 'View and print labels', 'Add / edit misc labels', 'Add / edit abbreviations', 'Add / edit warnings', 'Add / edit prescribers', 'Add / edit transaction categories', 'Add / edit contacts', 'Merge prescribers', and 'Add and edit options'. The 'Tenders...' section includes 'Create & edit tenders'. 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**.

The screenshot shows a window titled "Schedules & Periods". It contains two main sections: "Schedules" and "Periods". The "Schedules" section has a table with one column labeled "Name" and three empty rows. A red box highlights a plus icon (+) to the right of the "Schedules" section header. The "Periods" section has a table with three columns: "Name", "Start date", and "End date", and four empty rows. At the bottom of the window are two buttons: "Cancel" and "Save".

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

The screenshot shows a window titled "Add/Edit a Schedule". It contains a single text input field labeled "Name" with the text "Monthly" entered. A red box highlights this input field. At the bottom of the window are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a red box.

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

Periods

Cancel

Save

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