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## 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**.

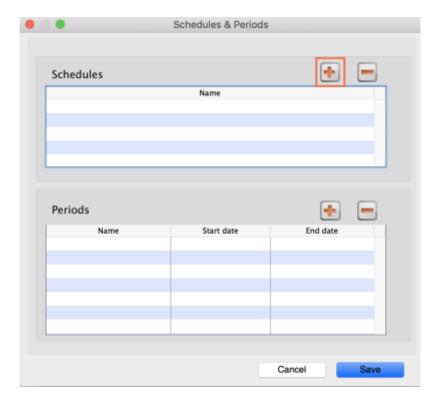


## Adding schedules and periods

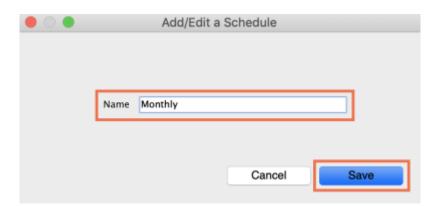
1. In the menu bar, click **Special** then **Periods...** 

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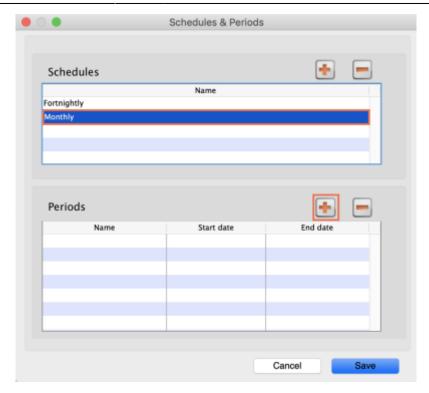
2. To create a new schedule, click the plus icon next to **Schedules**.



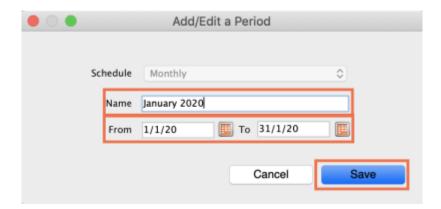
3. Name the schedule and click **Save**.



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



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.

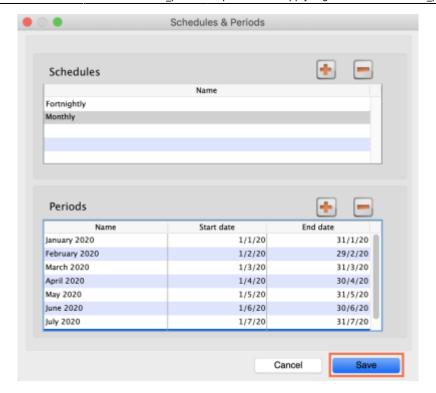


- 6. Keep adding all the periods within the schedule. If necessary, you can edit a period by double clicking on it.
- 7. When you are finished, click **Save**.



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

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



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