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**.

User Admin		Store: General Warehouse
General Permissions Permis	sions (2) Permissions (3) Login	rights Details Dashboard
Ordering		Admin
View purchase orders	Create purchase orders	Add / edit users
Delete purchase orders	Confirm purchase orders	Access server administration
Edit purchase orders	Create & edit backorders	Edit authorisers
Edit purchase order pricing	Create new quotes	Clone database
Manage tenders	Edit & delete quotes	Edit insurance providers
Finalise purchase orders	Duplicate purchase orders	Edit periods and period schedules
Authorise purchase orders	Print purchase orders	Goods receiving
llems		
Create new items	View inventory adjustments	View goods received Add/edit goods received
View Herra	Enter inventory adjustments	Authorise goods received
Edit items	Edit Inventory adjustments	Finalise goods received
Delete items	Wew cost prices of stack	Thatai good Picewed
Duplicate items	Edit item names, codes and units	Special
Create repacks or split stock	View DOD information for items	Add / edit currencies
	Manage item access	Add / edit reminders
Edik repacks		View and print labels
View pricing information for items	Manage drug interaction groups	Add / edit misc labels
Edit item units list	Manage locations	Add / edit abbreviations
Merge 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	Consolidate stock	Add / edit transaction categories
Add / edit master list	View stock	Add / edit contacts
Create and edit custom stock field value lists	Edit stock	Merge prescribers
	Modify donor on stock and transaction lines	Add and edit options
Supplier invoices with issued stock		Tenders
Update pack size, cost and sell price		Create & edit 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**.

9 🗣	Schedules & Periods		
Schedules		•	-
	Name		
Periods		-	-
Name	Start date	End date	
			- 1

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**.

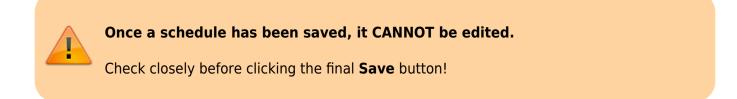
0	Schedules & Periods		
Schedules		+	-
	Name		
Fortnightly			_
Monthly			
			- 1
			_
Periods		.	
Name	Start date	End date	
			- 1
-			
		Cancel	Save

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	
S	chedule	Monthly	٥
	Name	January 2020	
	From	1/1/20 🔳 то 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**.



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

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