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22.04. 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 (special types of requisitions). 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

In a sync system, schedules and periods must be added on the **central server** and will then sync to other sites. Permission must be switched on for a user 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**.



User Admin Stere: Ceneral Warehouse Ceneral Permissions Permissions (2) Permissions (3) Login rights Details Dashboard Ordering Admin View purchase orders Create purchase orders Add / edit users Beliete purchase orders Create de dit backorders Bit purchase orders Bit purchase orders Create de dit backorders Bit authorisers Bit purchase orders Create de dit backorders Bit authorisers Bit purchase orders Create new utens Buplicate purchase orders Brans Duplicate purchase orders Cools received Items Coreate new items Steric riventory adjustments Bit tems Edit Inventory adjustments Bit tems Manage lena access View pricing information for Items Manage lena access View pricing information for Items Manage lena access View rotoris and duringt sock Consolidata stock Add / edit mascine access Add / edit warnings Add / edit mascine access Add / edit mascine access Nodify dain dost prices of existing stock Consolidata stock			Edit user					
Ordering Admin View purchase orders Create purchase orders Add / edit users Delete purchase orders Confirm purchase orders Access server administration Edit purchase orders Create a & edit backorders Edit authorisers Edit purchase orders Create new quotes Edit fauthorisers Finalise purchase orders Duplicate purchase orders Edit insurance providers Authorise purchase orders Duplicate purchase orders Edit fauthorisers Authorise purchase orders Duplicate purchase orders Edit fauthorisers Create new items View inventory adjustments Add/edit goods received View items Enter inventory adjustments Add/edit goods received Delete items View obod sreceived Finalise goods received Duplicate items View obod sreceived Add / edit currencies Create new items View obod sreceived Finalise goods received Duplicate items Edit intern names, codes and units Finalise goods received Create repacks or split stock View DDD information for items Add / edit currencies Edit item anteris, ist Manage locations Add / edit mainties	User Admin				Store	Gener	al Warehouse	
View purchase orders Create purchase orders Add / edit users Delete purchase orders Confirm purchase orders Add / edit users Edit purchase order pricing Create new quotes Edit authorisers Manage tenders Edit & delete quotes Edit insurance providers Finalise purchase orders Duplicate purchase orders Edit insurance providers Authorise purchase orders Print purchase orders Coods receiving Create new items View inventory adjustments Add/edit goods received View items Edit inventory adjustments Add/edit goods received Delete items View cost prices of stock Finalise goods received Duplicate items Edit item names, codes and units Add / edit currencies Create repacks Manage item access View and print labels View pricing information for items Manage locations Add / edit twarnings Add / edit departments Edit item default price Add / edit contacts Add / edit custom stock field value lists View stock Add / edit contacts Add / edit custom stock field value lists Modify donor on stock and transaction lines Add / edit coptions	General Permissions Permissions	nissions (2)	Permissions (3)	Login right	ts l	Details	Dashboard	
Delete purchase orders Confirm purchase orders Edit purchase orders Create & edit backorders Edit purchase order pricing Create new quotes Banage tenders Edit & delete quotes Finalise purchase orders Duplicate purchase orders Authorise purchase orders Duplicate purchase orders Authorise purchase orders Print purchase orders Create new items View inventory adjustments Edit items Edit inventory adjustments Edit items Edit item names, codes and units Create repacks or split stock View DDD information for items Edit item units list Manage item access View pricing information for items Manage locations Add / edit meminders View and print labels Add / edit munits list Manage locations Modify sell and cost prices of existing stock Consolidate stock Add / edit correcibers Add / edit correcibers Add / edit correcibers Add / edit cortacts Add / edit master list View stock Add / edit cortacts Add / edit cortacts Add / edit cortacts Add / edit cortacts Add / edit cortacts	Ordering				Admi	in		
Duplicate items Edit item names, codes and units Special Create repacks or split stock View DDD information for items Add / edit currencies Edit repacks Manage item access Add / edit reminders 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 rescribers Modify sell and cost prices of existing stock Consolidate stock Add / edit contacts Add / edit master list View stock Edit stock Merge prescribers Create and edit custom stock field value lists Modify donor on stock and transaction lines Add and edit options	View purchase orders Delete purchase orders Edit purchase order pricing Manage tenders Finalise purchase orders Authorise purchase orders Items Create new items View items Edit items	Co Cre Edi Du Prir Vie Ent Edi	nfirm purchase orders sate & edit backorders sate new quotes t & delete quotes plicate purchase orders nt purchase orders w inventory adjustment t inventory adjustments	ts.	Cood	dit author lone data dit insura dit period ls receivin iew goods dd/edit g uthorise g	ver administratio isers base nce providers s and period sch g s received oods received goods received	
Supplier invoices with issued stock Tenders	Create repacks or split stock Edit repacks View pricing information for items Edit item units list Merge two items Add / edit departments Modify sell and cost prices of existing stock Add / edit master list	Edi Vie Ma Ma Ma Edi Co Vie Edi S Mo	t item names, codes and w DDD information for nage item access nage drug interaction gi nage locations ke item inactive t item default price nsolidate stock w stock t stock dify donor on stock and	roups		dd / edit / dd / edit / iew and p dd / edit / dd / edit /	reminders rint labels misc labels abbreviations warnings prescribers transaction categ contacts cribers	pories
							t 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	Name	Ð	-
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**.

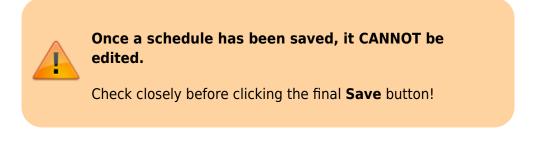
	Schedules & Periods		
Schedules		+	-
	Name		
Fortnightly	Harris		
Monthly			
Periods		•	-
Name	Start date	End date	
			_
		Cancel	Save

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/Ed	lit a Period	
Schedule	Monthly		٢
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**.



Schedules		÷ =
	Name	
Fortnightly		
Monthly		
Periods		•
Periods Name	Start date	End date
	Start date 1/1/20	
Name		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	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

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