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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**.

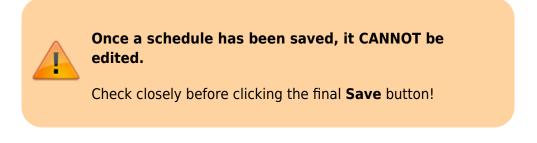
	Schedules & Periods		
Schedules		+	-
	Name		
Fortnightly	Harris		
Monthly			
Periods		•	-
Name	Start date	End date	
			_
		Cancel	Save

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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