

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 (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



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**.

Edit user

User **Admin** Store: **General Warehouse**

General **Permissions** **Permissions (2)** **Permissions (3)** **Login rights** **Details** **Dashboard**

Ordering

View purchase orders Create purchase orders
 Delete purchase orders Confirm purchase orders
 Edit purchase orders Create & edit backorders
 Edit purchase order pricing Create new quotes
 Manage tenders Edit & delete quotes
 Finalise purchase orders Duplicate purchase orders
 Authorise purchase orders Print purchase orders

Items

Create new items View inventory adjustments
 View items Enter inventory adjustments
 Edit items Edit inventory adjustments
 Delete items View cost prices of stock
 Duplicate items Edit item names, codes and units
 Create repacks or split stock View DDD information for items
 Edit repacks Manage item access
 View pricing information for items Manage drug interaction groups
 Edit item units list Manage locations
 Merge two items... Make item inactive
 Add / edit departments Edit item default price
 Modify sell and cost prices of existing stock Consolidate stock
 Add / edit master list View stock
 Create and edit custom stock field value lists Edit stock
 Update pack size, cost and sell price Modify donor on stock and transaction lines

Supplier invoices with issued stock

Update pack size, cost and sell price

Admin

Add / edit users Access server administration
 Edit authorisers Clone database
 Edit insurance providers Edit periods and period schedules

Goods receiving

View goods received Add/edit goods received
 Authorise goods received Finalise goods received

Special

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
 Add and edit options Create & edit tenders

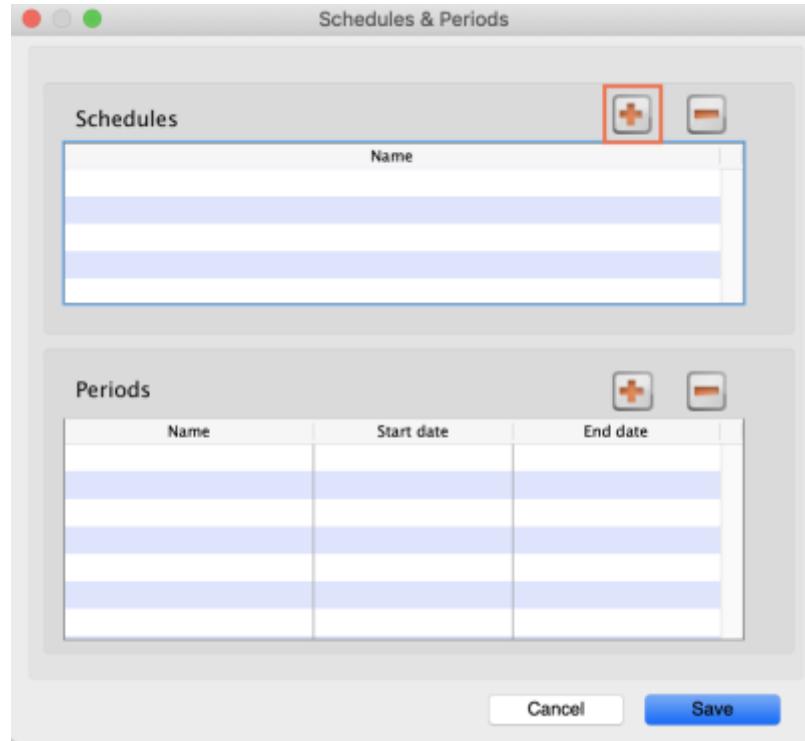
Tenders...

Create & edit tenders

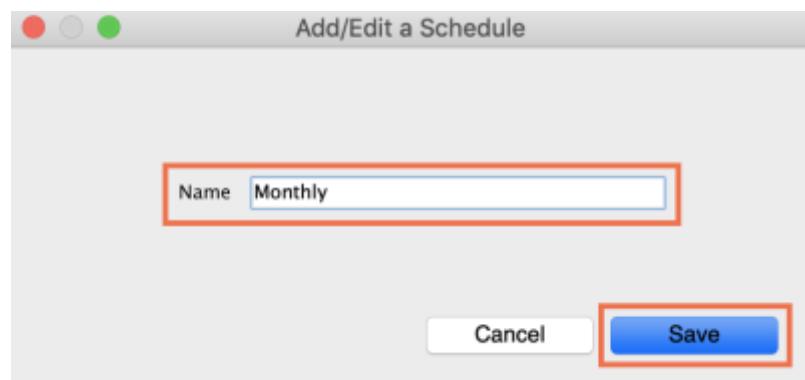
All on Copy Paste Delete Cancel OK

Adding schedules and periods

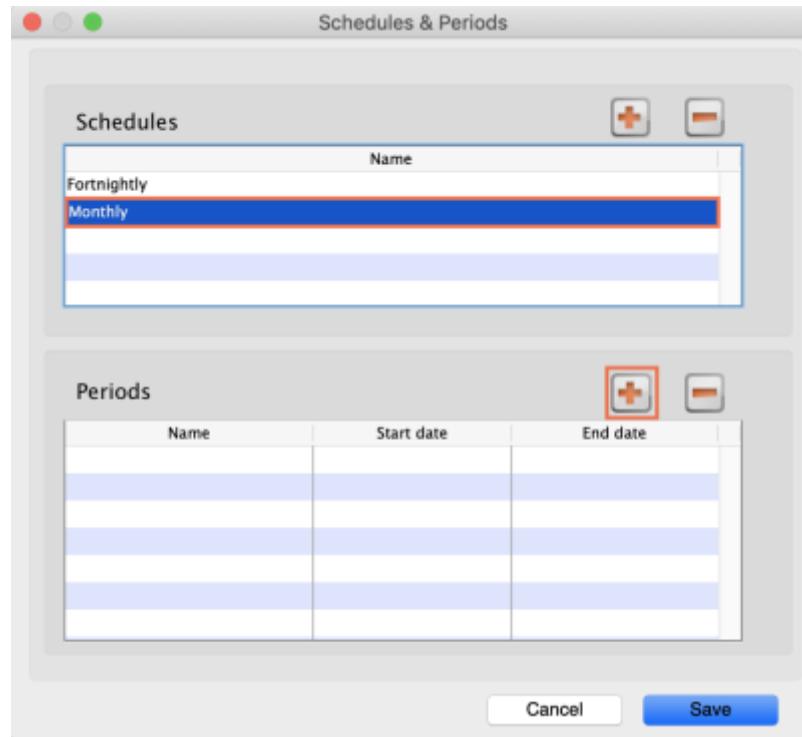
1. In the menu bar, click **Special** then **Periods...**
2. To create a new schedule, click the plus icon next to **Schedules**.



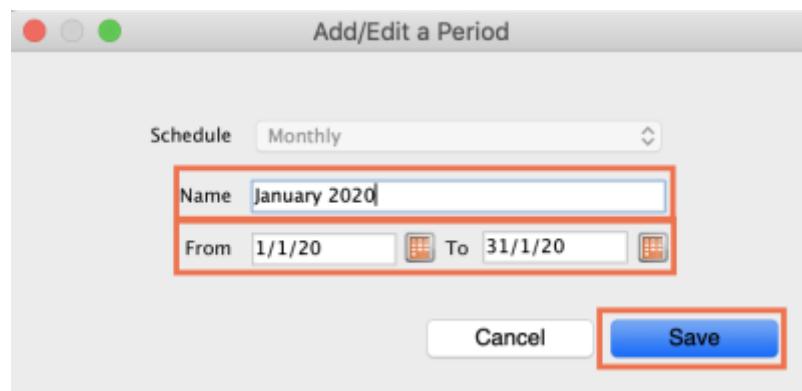
3. Name the schedule and click **Save**.



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.



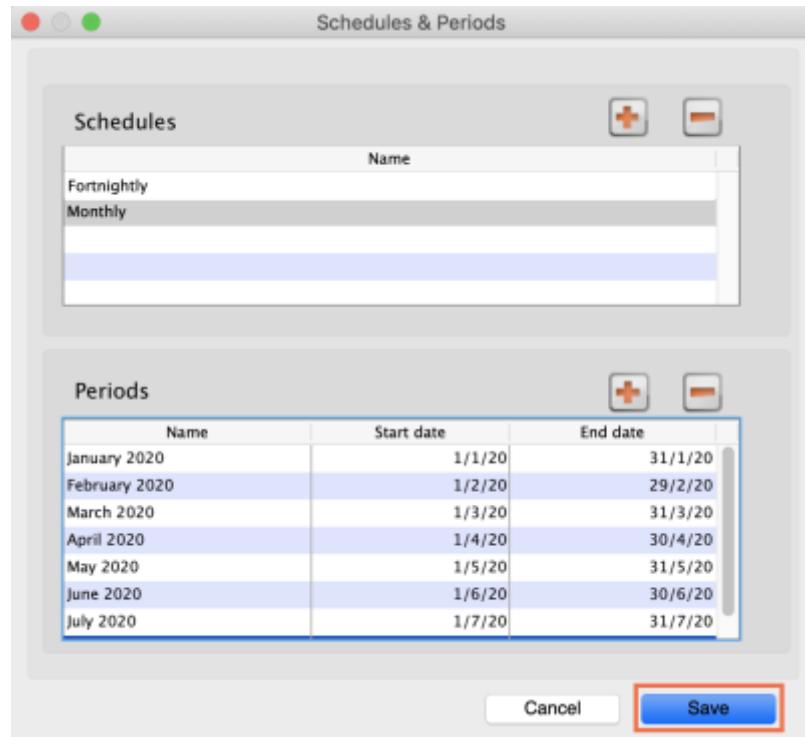
6. Keep adding all the periods within the schedule. If necessary, you can edit a period by double clicking on it.

7. When you are finished, click **Save**.



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

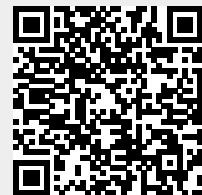
Check closely before clicking the final **Save** button!



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