

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: Store:

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

Ordering

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

Items

- ☐ Create new items
- ☐ View items
- ☐ Edit items
- ☐ Delete items
- ☐ Duplicate items
- ☐ 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
- ☐ Create and edit custom stock field value lists
- ☐ View inventory adjustments
- ☐ Enter inventory adjustments
- ☐ Edit inventory adjustments
- ☐ View cost prices of stock
- ☐ Edit item names, codes and units
- ☐ View DDD information for items
- ☐ Manage item access
- ☐ Manage drug interaction groups
- ☐ Manage locations
- ☐ Make item inactive
- ☐ Edit item default price
- ☐ Consolidate stock
- ☐ View stock
- ☐ Edit stock
- ☐ Modify donor on stock and transaction lines

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

Tenders...

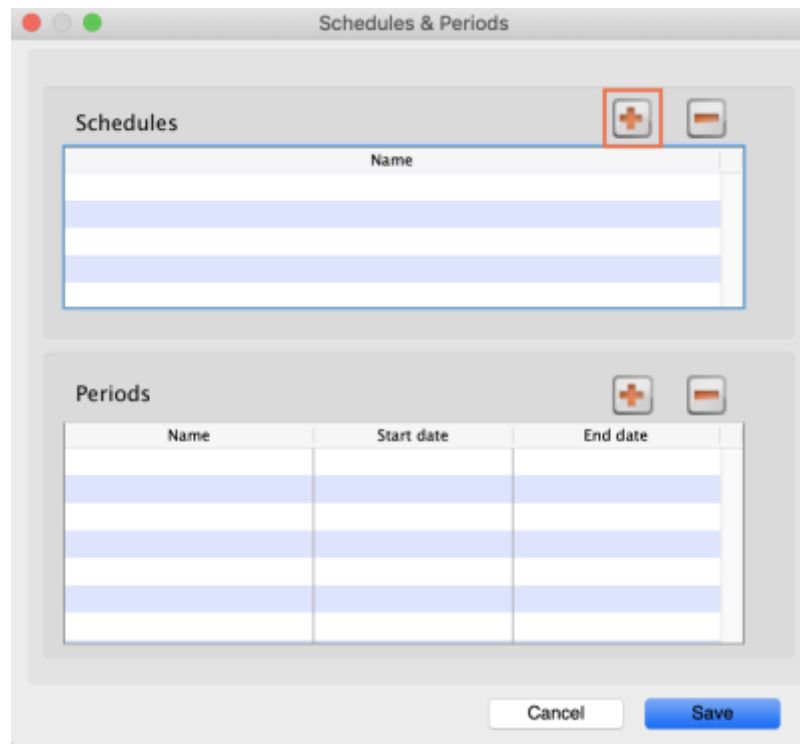
- ☐ Create & edit tenders

Supplier invoices with issued stock

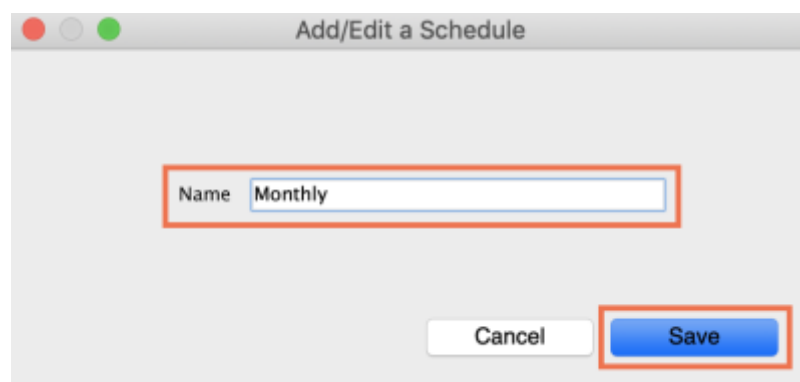
- ☐ Update pack size, cost and sell price

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**.

Schedules & Periods

Schedules

Name
Fortnightly
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/Edit a Period

Schedule: Monthly

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**.



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

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

Schedules & Periods

Schedules

Name
Fortnightly
Monthly

Periods

Name	Start date	End date
January 2020	1/1/20	31/1/20
February 2020	1/2/20	29/2/20
March 2020	1/3/20	31/3/20
April 2020	1/4/20	30/4/20
May 2020	1/5/20	31/5/20
June 2020	1/6/20	30/6/20
July 2020	1/7/20	31/7/20

Cancel Save

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