

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



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**.

Edit user

User: Admin

Store: General Warehouse

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

Ordering

Items

Supplier invoices with issued stock

Admin

Goods receiving

Special

Tenders...

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

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

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

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

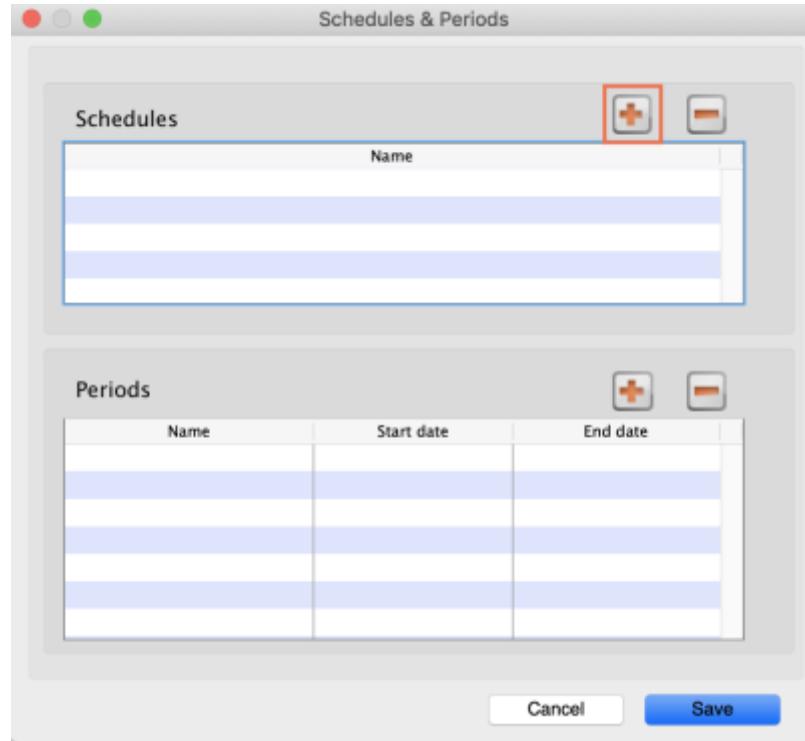
Add / edit currencies
 Add / edit reminders
 View and print labels
 Add / edit misc labels
 Add / edit abbreviations
 Add / edit warnings
 Add / edit prescribers
 Add / edit transaction categories
 Add / edit contacts
 Merge prescribers
 Add and edit options

Create & edit tenders

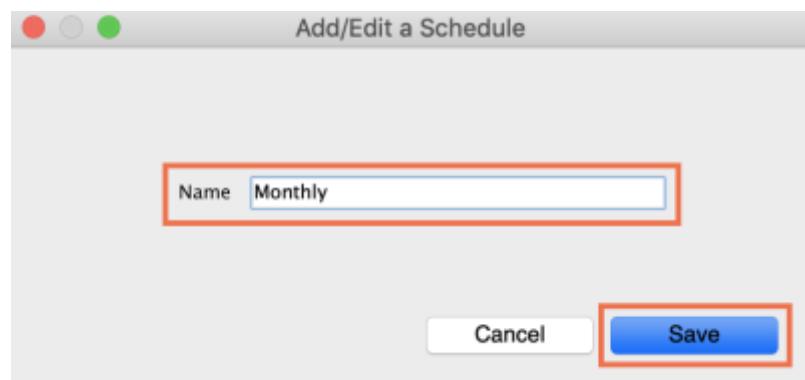
All on Copy Paste Delete Cancel OK

Adding schedules and periods

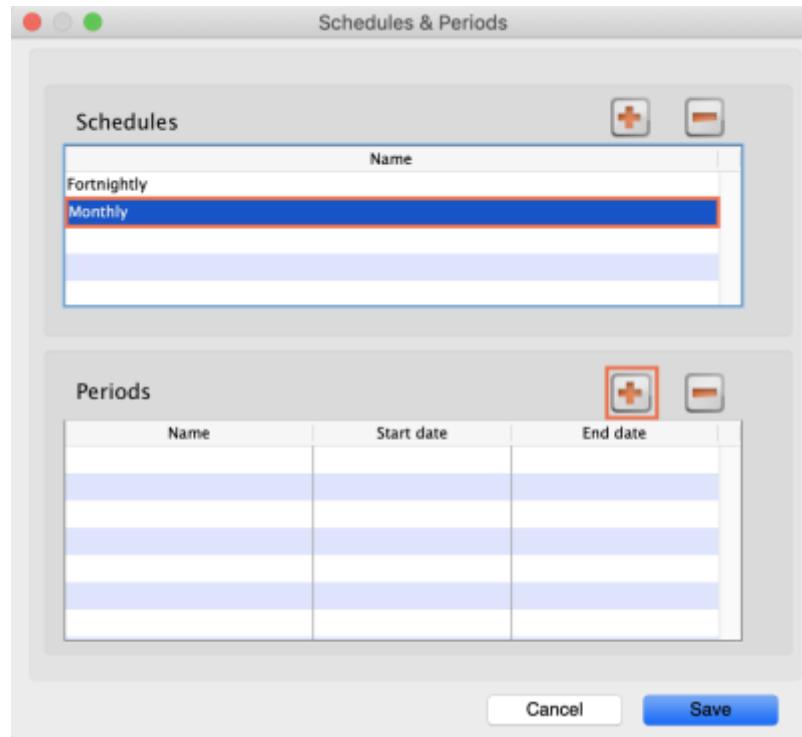
1. In the menu bar, click **Special** then **Periods...**
2. To create a new schedule, click the plus icon next to **Schedules**.



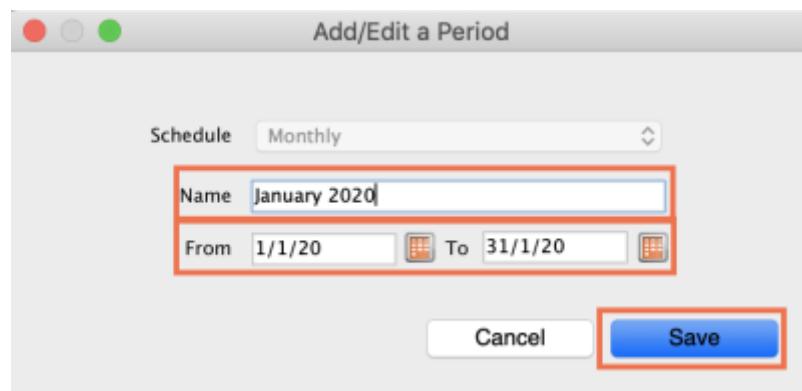
3. Name the schedule and click **Save**.



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.



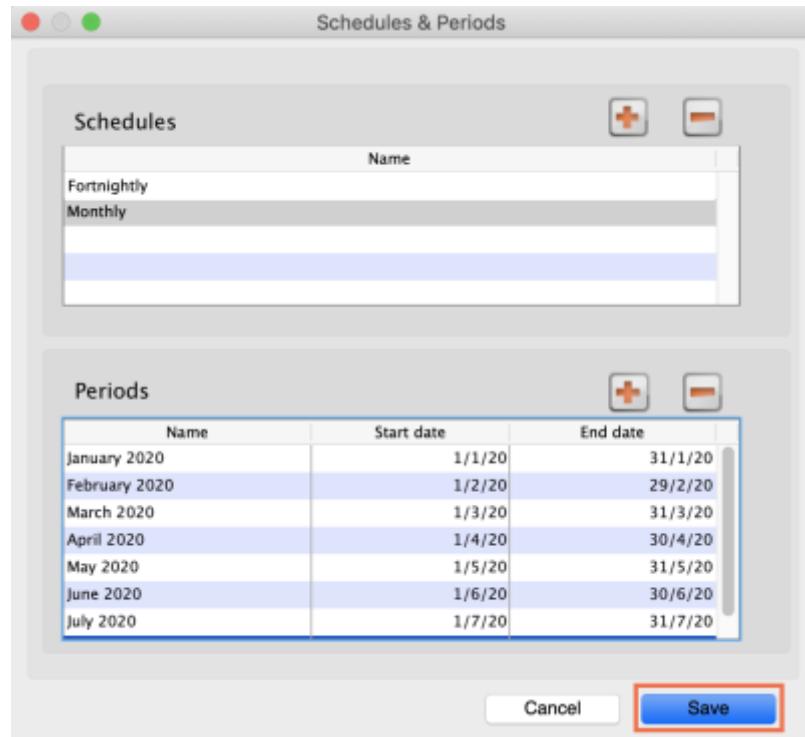
6. Keep adding all the periods within the schedule. If necessary, you can edit a period by double clicking on it.

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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