

21.05. 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. 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 can only be added and edited on the **central server**. Permission must be switched on for a user to perform this function.

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**.

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**.

The screenshot shows a window titled "Schedules & Periods". It contains two main sections: "Schedules" and "Periods". The "Schedules" section has a plus icon (+) highlighted with a red box. The "Periods" section is a table with columns "Name", "Start date", and "End date". At the bottom of the window are "Cancel" and "Save" buttons.

Name	Start date	End date

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

The screenshot shows a window titled "Add/Edit a Schedule". It has a "Name" field containing the text "Monthly", which is highlighted with a red box. Below the field are "Cancel" and "Save" buttons, with the "Save" button also highlighted with a red box.

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

Periods

Cancel

Save

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