

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. 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.

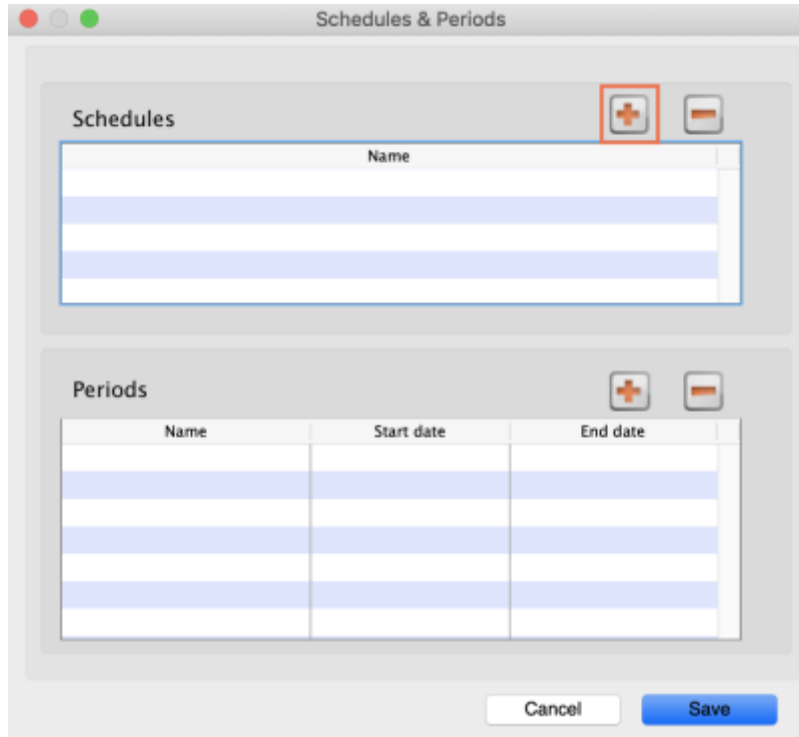
1. Go to **Admin > Edit Users >** double click the user to be edited > **Permissions**.
2. In the Admin section, check the **Edit periods and period schedules** box.
3. Click **OK**.

The screenshot shows the 'Edit user' window with the 'Permissions' tab active. The 'Admin' section contains a list of permissions, with 'Edit periods and period schedules' checked and highlighted. Other permissions include 'Add / edit users', 'Access server administration', 'Edit authorisers', 'Clone database', and 'Edit insurance providers'. The 'Goods receiving' section includes 'View goods received', 'Add/edit goods received', 'Authorise goods received', and 'Finalise goods received'. The 'Special' section includes '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', and 'Add and edit options'. The 'Tenders...' section includes 'Create & edit tenders'. At the bottom, there are buttons for 'All on', 'Copy', 'Paste', 'Delete', 'Cancel', and 'OK'.

Adding schedules and periods

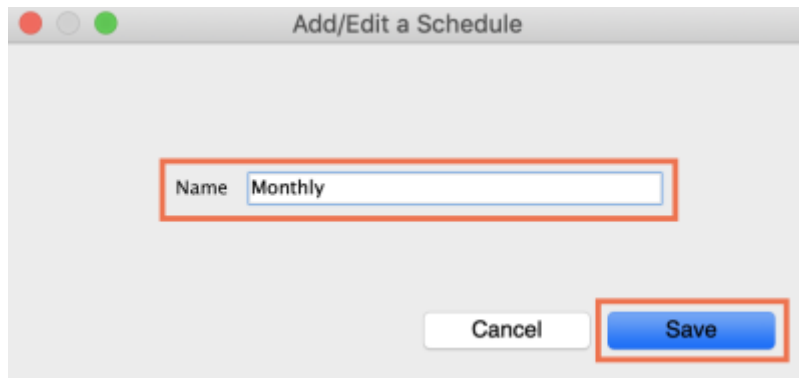
1. In the menu bar, click **Special** then **Periods...**

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 table with one header row labeled "Name" and three empty rows. A red box highlights a plus icon (+) in the top right corner of the "Schedules" section. The "Periods" section has a table with three header rows labeled "Name", "Start date", and "End date", and three empty rows. A red box also highlights a plus icon (+) in the top right corner of the "Periods" section. At the bottom of the window are "Cancel" and "Save" buttons.

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



The screenshot shows a window titled "Add/Edit a Schedule". It contains a single text input field labeled "Name" with the text "Monthly" entered. A red box highlights the "Name" field. Below the field are "Cancel" and "Save" buttons. A red box highlights the "Save" button.

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

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

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