

# 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



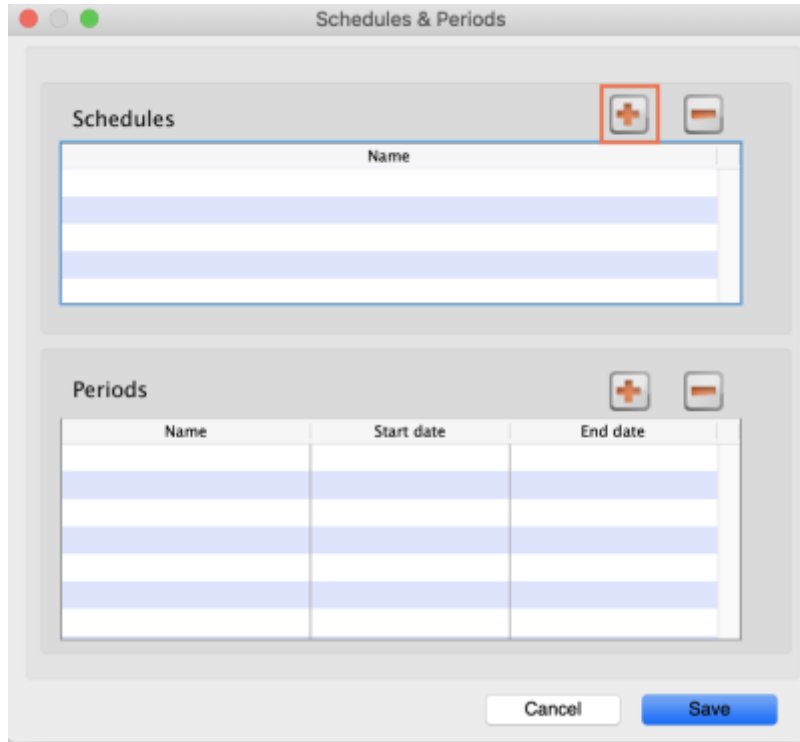
Schedules and periods must be added on the **central server** and will then sync to other sites. Permission must be switched on for a user to add/edit schedules and periods.

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**.

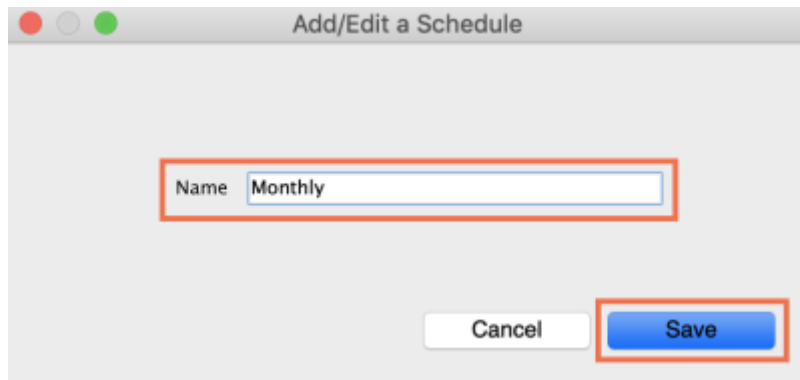
The screenshot shows the 'Edit user' dialog box with the 'Permissions' tab active. The 'Admin' section contains a list of permissions, with 'Edit periods and period schedules' checked and highlighted by a red rectangle. Other permissions listed include 'View purchase orders', 'Create purchase orders', 'Add / edit users', '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', 'View goods received', 'Add/edit goods received', 'Authorise goods received', 'Finalise goods received', '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', and 'Create & edit tenders'.

# 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.



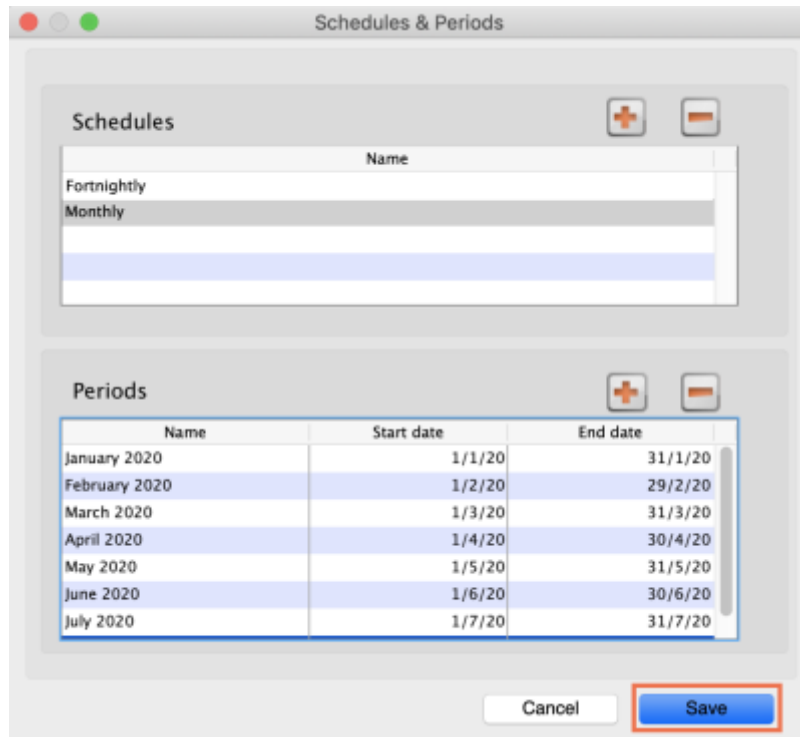
6. Keep adding all the periods within the schedule. If necessary, you can edit a period by double clicking on it.

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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