

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



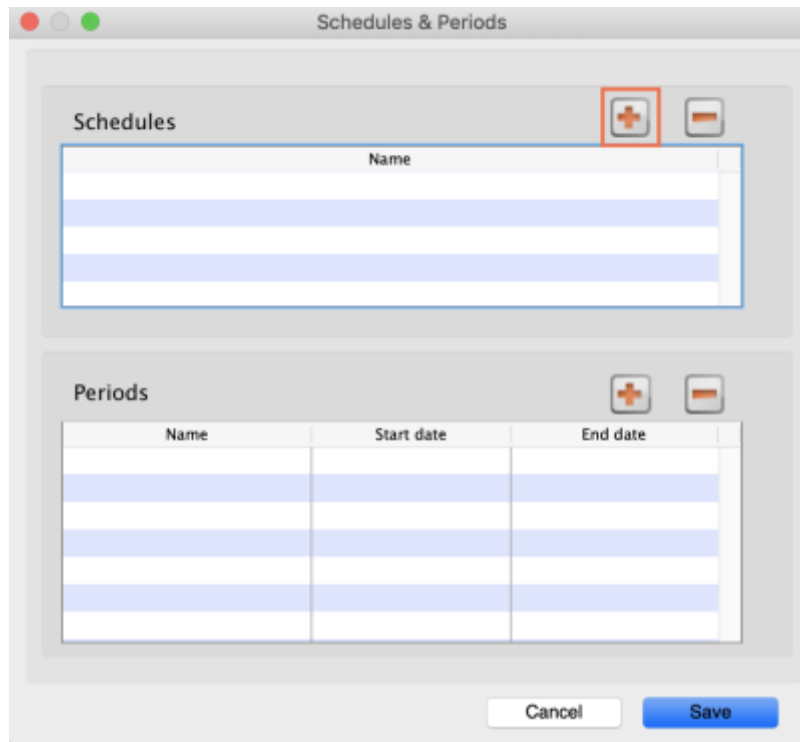
Schedules and periods must be added on the **central server** and will then sync to other sites. Permission must be switched on for a user to add/edit schedules and periods.

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**.

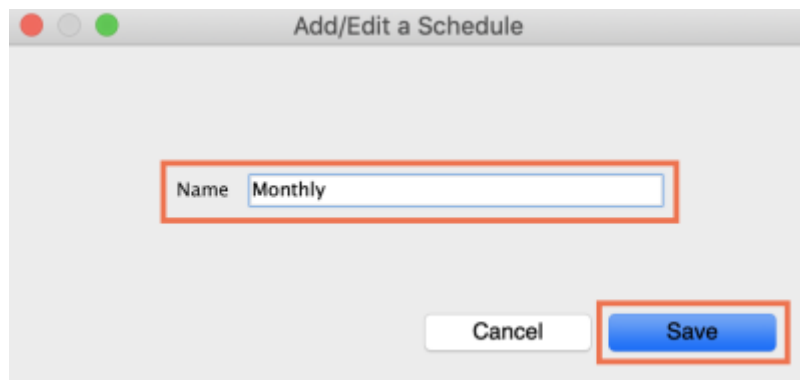
The screenshot shows the 'Edit user' window for a user named 'Admin'. The 'Permissions' tab is active. The 'Admin' section contains a list of permissions, with 'Edit periods and period schedules' checked and highlighted by a red box. Other permissions listed include 'View purchase orders', 'Create purchase orders', 'Add / edit users', 'Access server administration', etc. The 'Goods receiving' section has '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 has '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**.



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

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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