

## 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**.

**Edit user**

User:  Store:

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

**Ordering**

- ☐ View purchase orders
- ☐ Delete purchase orders
- ☐ Edit purchase orders
- ☐ Edit purchase order pricing
- ☐ Manage tenders
- ☐ Finalise purchase orders
- ☐ Authorise purchase orders
- ☐ Create purchase orders
- ☐ Confirm purchase orders
- ☐ Create & edit backorders
- ☐ Create new quotes
- ☐ Edit & delete quotes
- ☐ Duplicate purchase orders
- ☐ Print purchase orders

**Items**

- ☐ Create new items
- ☐ View items
- ☐ Edit items
- ☐ Delete items
- ☐ Duplicate items
- ☐ Create repacks or split stock
- ☐ Edit repacks
- ☐ View pricing information for items
- ☐ Edit item units list
- ☐ Merge two items...
- ☐ Add / edit departments
- ☐ Modify sell and cost prices of existing stock
- ☐ Add / edit master list
- ☐ Create and edit custom stock field value lists
- ☐ 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

**Admin**

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

**Goods receiving**

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

**Special**

- ☐ 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

**Tenders...**

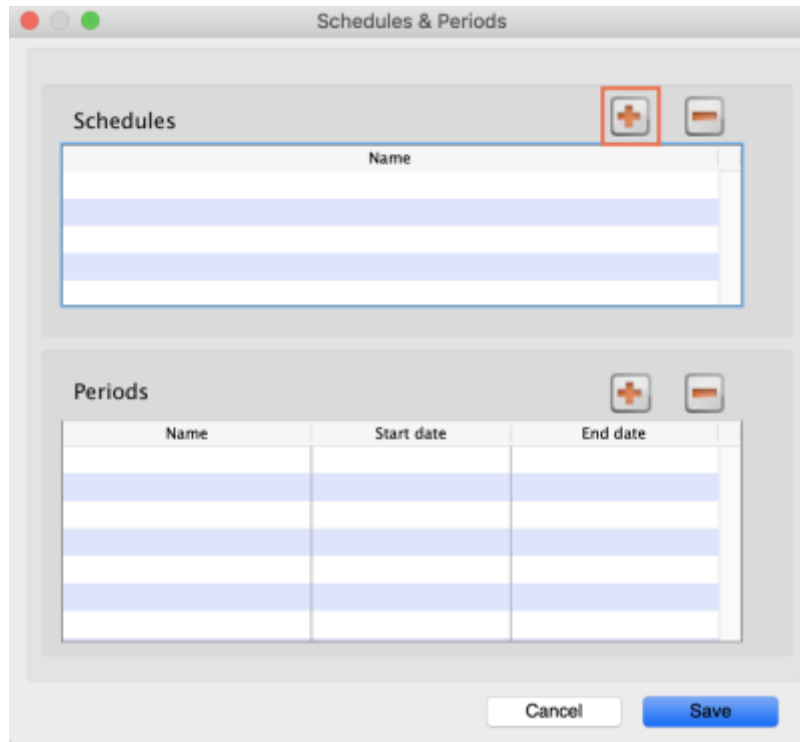
- ☐ Create & edit tenders

**Supplier invoices with issued stock**

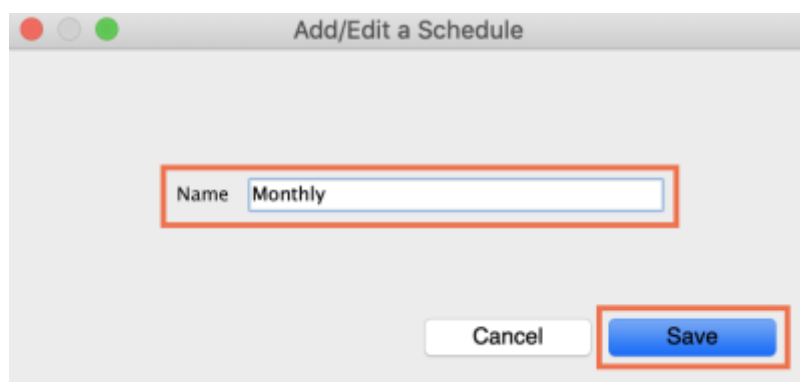
- ☐ Update pack size, cost and sell price

## 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**

Name
Fortnightly
Monthly

**Periods**

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

Cancel Save

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