# Calendar 4B – Resource Schedule Blocks - WINNIE Online Training Module

**MAY 2023**

## Introduction

### Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program.  It is an overview of Resource Schedule Blocks in WINNIE, the MN WIC Information System.

### Date

A All dates in this module are based on today's date being May 18, 2023.

## Resource Schedules Continued

### <Transition Slide>

<screen description – no audio> Slide transitions from topic slide to Clinic Scheduled page.

### Overview

In the previous module, we identified the changes to the Resource Schedules we were going to make.

We had completed #1 and started #2.

Let's continue revising our schedules in the last week of May.

### Calendar 1

We want to change the end time of CPA 1 on May 22nd.

How do you think we do that? Go ahead. Click anywhere for hint.

<audio – hint> Click the CPA 1 9:00 AM – 12:30 PM row on May 22nd.

WIC STAFF: I need to change CPA 1 to 9:00AM to 4:30 PM on 5/22.

## Schedule Modal 1

<audio – hint> Click the Edit button.

## RS Modal 1

We are going to change the end time to 4:30 PM.

Click on the time in the End Time field to highlight it.

> WIC STAFF: Let's see…4:30 PM, right?

## RS Modal 2

Type 4:30 PM.

## RS Modal 3

If we click Save, the modal remains open so that we can make another change.

Clicking Save & Close, does just that. Go ahead and click it.

<no audio> Click the Save & Close button.

## Waiting

<screen description – no audio> Spin icon displays.

## Waiting

<screen description – no audio> Spin icon displays. Calendar generates.

## Calendar 2

Let's block off lunch for our resources on May 22nd.

Even though we haven't done this yet, how do you think we block time for CPA 1 on May 22nd? Go ahead. Click anywhere for a hint.

<audio – hint> Click the CPA 1 9:00 AM – 4:30 PM row on May 22nd.

> WIC STAFF: OK. Next, gotta block off lunch for the 5/22 schedules…
>
> I'll start with CPA 1 on 5/22.

## Schedule Modal 2

<audio – hint> Click the Block button.

## Block RS Modal 1

The block modal looks very familiar, doesn't it?

The information defaults for the resource row we clicked on and displays the calendar date, resource schedule, and any appointments.

The dates and Day, Weeks of Month, Start Time, and End Time are all required.

The Overwrite toggle is new.

It allows us to edit an existing block while in this modal and we'll see that in a minute.

## Block RS Modal 2

We are adding a time block for CPA 1 where there used to be a gap in the two schedules so from 12:30 to 1:00 PM.

What do you think our To Date is?

Use the calendar control to select it. Click anywhere for a hint.

<audio – hint> Click the calendar icon in the To Date field.

## Block RS Modal 3

<audio – hint> Select May 22nd.

## Block RS Modal 4

We are going to use our shortcut again. Toggle on Select.

## Block RS Modal 5

Click the Sunday Weeks of Month dropdown.

## Block RS Modal 6

Select All.

## Block RS Modal 7

Click the Sunday Start Time clock icon.

## Block RS Modal 8

Another little shortcut if using the time dropdown.

Our time is 12:30 PM to 1:00 PM, right?

So, select 12:30 AM.

## Block RS Modal 9

Double-click the AM.

## Block RS Modal 10

Type PM.

## Block RS Modal 11

Let's do pretty much the same for the End Time.

Using the End Time clock icon, select 1:00 AM, double-click AM, type PM.

## Block RS Modal 12

<no audio> Using the End Time clock icon, select 1:00 AM, double-click AM, type PM.

## Block RS Modal 15

What must we do next? Go ahead. Click anywhere for a hint.

<audio – hint> Click the Copy to All Blank Rows icon in the Sunday row.

## Block RS Modal 16

We are going to add more blocks to other resource schedules.

Which Save button should we click? Go ahead.

<audio – hint> We click the Save button since we want the modal to stay open.

## Waiting

<screen description – no audio> Spin icon displays. Calendar generates.

## Block RS Modal 17

Once created, the block always displays separately in the calendar view.

We should note that blocks can be scheduled at the same time as appointments and group education classes.

Let's add blocks for the rest of the resources scheduled on May 22nd; they are all going to have a lunch break from 12 to 1 PM.

Click the Resource dropdown.

## Block RS Modal 18

Select CPA 2.

## Block RS Modal 19

This time, we don't have a mechanism to change all the existing Start Times, so we actually have to change the Start Time for the appropriate day.

Which is what day? Click the Start Time clock icon for the correct day.

Click anywhere for a hint.

<audio – hint> Click the Start Time clock icon in the Monday row.

## Block RS Modal 20

Select 12:00 PM and click Save to keep the modal open.

## Block RS Modal 21

<no audio> Select 12:00 PM and click Save to keep the modal open.

## Waiting

<screen description – no audio> Spin icon displays.

## Block RS Modal 22

Add the same block for the next two resources (in the order they display in the dropdown).

<audio – hint> Click the Resource dropdown.

## Block RS Modal 23

<audio – hint> Select Somali 1.

## Block RS Modal 24

<audio – hint> We click the Save button to keep the modal open.

## Block RS Modal 25

<audio – hint> Click the Resource dropdown.

## Block RS Modal 26

<audio – hint> Select RD.

## Block RS Modal 27

We are going to make a couple of more changes, so click the Save button.

## Waiting

<screen description – no audio> Spin icon displays.

## Overwrite 1

What if we wanted to change the Start Time for the RD block from 12:00 to 11:30AM?

If we simply click the Start Time…

## Overwrite 2

…select 11:30 and attempt to Save…

## Overwrite 3

…an Information message displays indicating the "resource is already blocked."

## Overwrite 4

This is an instance when we would use the Overwrite toggle.

If we are in the Block Resource Schedule(s) modal and want to edit an existing time period, we must toggle on Overwrite.

Overwrite functions to delete the existing time period and replace it with our current time selections.

Toggle on Overwrite.

## Overwrite 5

Click Save.

<no audio> Click the Save button.

## Add Block 1

We can also add another block.

Before we do anything, we need to toggle off overwrite, otherwise, it will delete our 11:30 to 1:00 block.

Go ahead and do that.

<no audio> Toggle off Overwrite.

## Add Block 2

Our RD is unavailable from 9:00 to 9:45 AM for appointments, so we want to add another block on Monday.

## Add Block 3

Go ahead and adjust the Monday Start Time to 9:00 AM by using the dropdown.

## Add Block 4

<no audio> Adjust the Monday Start Time to 9:00 AM by using the dropdown.

## Add Block 5-7

Type 9:45 AM into the End Time field then click the Save & Close button.

## Waiting

<screen description – no audio> Spin icon displays. Calendar generates.

## Calendar 3

Our blocks are added separately, in dark gray, to the calendar.

The resource schedules and blocks display chronologically by start time.

Notice that WINNIE treats resource schedules and blocks as separate and distinct entities.

If we want to edit a block once it's been added to our main calendar, we single click its row.

For instance, we made an error with the Somali 1 resource's block and schedule.

We'll correct the block first. What do we do? Click anywhere for a hint.

<audio – hint> Click the dark gray Somali 1 12:00 PM – 1:00 PM row.

> WIC STAFF: Arrgh. This is what happens when I try to do this from memory. The Somali 1 block and schedule aren't right...

## Block Modal 1

This time a **Block** modal opens with the blocked Resource name, date, and time.

We can Edit, Copy, and Delete the block we clicked on, or open a Delete modal to specify which blocks to delete and when.

Were going to make a click the Edit button.

## Block RS Modal 28

Like the Resource Schedule(s) modal, despite selecting the Somali 1 block, we can edit any of the other resources with blocks on 5/22.

Even though we just scheduled this resource, changes to the calendar occur almost real-time, so there are already appointments, and like when editing resources, they display.

We can edit the block's Start and End Time as we've already done multiple times, or we can …

## Click-and Drag 1

…we can click and drag the block to a different time within the calendar.

Notice that we can overlap existing appointments.

We can also click and drag the edge of the block to alter the length of it…

## Overlap Appts

The system auto-saves this type of change and updates the values in the Time fields.

Let's take a moment to talk about the system allowing blocks to overlap existing appointments.

Like partial-day events, this provides flexibility in that we can block off the time and then resolve conflicts, if necessary, on our own time instead of the system dictating we resolve the conflict before allowing us to add blocks.

Our changes are saved so we can click Cancel.

<no audio> Click the Cancel button.

## Calendar 4

We can adjust resources schedules just like blocks.

How do you think we update the Somali 1 schedule on May 22nd? Go ahead. Click anywhere for a hint.

<audio – hint> Click the light blue Somali 1 row for 8:00 AM – 4:00 PM on May 22nd.

> WIC STAFF 1:  I noticed my schedule for Monday... did I forget to let you know that my kids have a late start and I can't get here until after 10?
>
> WIC STAFF 2:  No. You totally did…I just forgot when I created your schedule. I'm fixing it now!

## Schedule Modal 3

<audio – hint> Click the Edit button.

## RS Modal 1

We are going to change the Start Time to 10:00.

Type 10:00 AM for the Start Time and save.

## RS Modal 2-3

<no audio> Type 10:00 AM for the Start Time and save.

## RS Modal 4

We can also click-and-drag resource schedules in the calendar.

WIC STAFF: Whoops! Dahlia said **after** 10…

## Click-and-Drag 2

If we want to change the schedule from 10 to 10:30 we can click-and-drag it and the system auto-saves and updates the Start Time.

## RS Modal 5

We should note again that to allow more flexibility, the calendar treats the resource schedule and the block as two distinct entities.

Nothing will happen if we try to click-and-drag the **block** while in the Resource Schedule(s) modal.

Since our changes are saved, we can just click Cancel.

<no audio> Click the Cancel button.

## Waiting

<screen description – no audio> Spin icon displays. Calendar generates.

## Calendar 4

Our Somali 1 schedule now begins after the first RD block.

We have completed making our changes to the May calendar.

In the next module, we'll work on creating the June calendar.

But first, let's go back to Clinic Services and view our changes in the Clinic Schedule.

Go ahead. Click anywhere for a hint.

<audio – hint> Click the Toggle Applications icon, or Agency Administration, on the blue header.

## Module Launcher 1

<audio – hint> Click the Clinic Services button.

## Clinic Schedule 1

<audio – hint> Click Clinic Schedule under Calendar on the sidebar.

## Waiting

<screen description – no audio> Spin icon displays. Calendar generates.

## Clinic Schedule 2

Select May 22nd from the dropdown calendar.

## Clinic Schedule 3

<no audio> Select May 22nd from the dropdown calendar.

## Waiting

<screen description – no audio> Spin icon displays.

## Clinic Schedule 4

Go ahead and collapse the Scheduler panel.

<audio – hint> Click the Toggle Panel icon, or minus sign, in the top right of the Scheduler header.

## Clinic Schedule 5

We added, then adjusted, our Somali 1 resource.

There used to be a morning and afternoon CPA 1 resource schedule with a gap for lunch.

Click below the internal scroll bar.

## Clinic Schedule 6

Now there is one CPA 1 schedule with a **block** for lunch.

We also added and adjusted blocks for the rest of our resources.

Click below the internal scroll bar again.

## Clinic Schedule 7

Now use the dropdown calendar to view May 24th.

<no audio> Select May 24th from the dropdown calendar.

## Clinic Schedule 8

<no audio> Select May 24th from the dropdown calendar.

## Waiting

<screen description – no audio> Spin icon displays.

## Clinic Schedule 8

We can see our CPA 1 resource was deleted from May 24th.

## <Transition Slide>

<screen description – no audio> Slide transitions to topic slide.

# Test Your Knowledge

## T/F Q#1

True or False?

If we want to edit a resource, we can click on either a resource or block row in the calendar. Either one opens the same modal so that we can select Edit.

## Answer #1

The answer is False.

To provide more flexibility, WINNIE treats resources and blocks as separate and distinct entities.

If a resource row is clicked on in the calendar, the Schedule modal opens.

If a block row is clicked, the Block modal opens.

## Multiple Choice Q#2

Which statement is true?

    A.  We have to toggle on Overwrite when adding another block to a resource that already has one.

B. We can see scheduled appointments in the calendar in the Delete Resource Schedule(s) modal when deleting resources.

C. We can create blocks that overlap scheduled appointments.

D. When editing resources, as long as the resource has an existing schedule in the future, it will display in the Resource dropdown.

E. We can delete resource schedules in the past as long as there aren't any appointments scheduled.

## Answer #2

The answer is C.

WINNIE allows us to create blocks even if there are appointments scheduled during the same time. This allows us the flexibility of resolving any conflicts on our own time.

Why the other statements are false:

A – Toggling on Overwrite deletes any existing blocks and replaces them with the newly added block.

B – We can only see appointments when editing resources and creating/editing blocks, but not when deleting.

D – The only resources available in the Resource dropdown when editing are those scheduled for the same date.

E – We cannot make any changes to resource schedules in the past.

# End

## End Slide

Thank you for reviewing this WINNIE online training module presented by the Minnesota Department of Health WIC Program.

If you have any feedback, comments, or questions about the information provided, please submit the WINNIE Questions for the State WIC Office form.

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