Calendar 4D – Copy to Resource – 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 creating calendars and using copy to resource in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being May 24, 2023

<Transition Slide>

<screen description – no audio> Slide transitions from topic slide to Resource Schedules page.

Calendar 1

Let's continue creating our June resource schedules for Clinic 166.

Click the button to continue.

Grid 1

We've added our Spanish, Somali and RD schedules and have to add their blocks from 2-3.

Click the button to continue.

Block 1

Let's start with adding a block for our Spanish resource on the second Thursday.

<no audio> Add a block for SPANISH 1 on the 2nd Thursday.

<audio – hint> Click the SPANISH 1 row on June 8th.

Block 2

<no audio> Add a block for SPANISH 1 on the 2nd Thursday.

Block 3

It's just for June 8th so we'll select that for the End Date, use our shortcut of selecting all, type 2:00 PM and 3:00 PM into the Start and End Times, click the Copy to All Blank Rows icon, and click Save because we want the modal to remain open. Go ahead.

<no audio> Using the calendar control in the End Date field select June 8th, use the Select All shortcut, type 2:00 PM into the Start Time, type 3:00 PM into the End Time, click the Copy to All Blank Rows icon, and click Save.

Block 4-4A

<no audio> Using the calendar control in the End Date field select June 8th, use the Select All shortcut, type 2:00 PM into the Start Time, type 3:00 PM into the End Time, and click the Save button.

Block 5

<no audio> Using the calendar control in the End Date field select June 8th, use the Select All shortcut, type 2:00 PM into the Start Time, type 3:00 PM into the End Time, and click the Save button.

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

Block 5A

<no audio> Using the calendar control in the End Date field select June 8th, use the Select All shortcut, type 2:00 PM into the Start Time, type 3:00 PM into the End Time, and click the Save button.

Waiting

<screen description – no audio> Spin icon displays.

Resource 1

We also want to add the same blocks for our Somali and RD resources on the 3rd and 4th Thursdays.

Right now, our only options in the Resource dropdown are, go ahead and click the dropdown…

<no audio> Click the Resource dropdown.

Resource 2

…are CPA 1 and Spanish 1.

Click to close the dropdown.

<no audio> Click the Resource dropdown.

Resource 3

In order to be able to select Somali 1 from the Resource dropdown, we have to select the date they are scheduled that we want to add our block to.

Click the dropdown calendar button.

Resource 4

Select the third Thursday.

<audio – hint> Select June 15th.

Resource 5

Now when we click the Resource dropdown…go ahead and do that…

<no audio> Click the Resource dropdown.

Resource 6

…we can select our Somali 1 resource. Go ahead and do that.

<no audio> Select Somali 1.

Block 6

To add our block to the correct date, we must also update our From and To Dates.

Using the calendar controls, select the third Thursday and Save the changes.

<no audio> Using the calendar controls, select the third Thursday from the From Date and To Date fields, and Save.

Waiting

<screen description – no audio> Spin icon displays.

Block 7

Let's do the same thing to add the RD resource's block on the fourth Thursday.

<no audio> Select the fourth Thursday using the dropdown calendar button, select RD, using the calendar controls select the fourth Thursday for the From and To Dates, and Save & Close.

Block 7A

<no audio> Select the fourth Thursday using the dropdown calendar button, select RD, using the calendar controls select the fourth Thursday for the From and To Dates, and Save & Close.

Waiting

<screen description – no audio> Spin icon displays.

Block 8

Click the button to continue.

Grid 2

Our last schedule for May in this clinic is CPA 2 on the 2nd, 3rd, and 4th Thursdays from 11 to 7 with a 3 to 4 PM block.

Click the button to continue.

Copy Resource

Copy Overview

This is what the copy function can do: It can **duplicate** a resource's schedule, day, time and blocks, to another resource or clinic, or multiple resources and clinics, for the exact same date or dates.

It **cannot** copy a resource's schedule, or schedules, to **different** dates.

<Transition Slide>

<screen description – no audio> Slide transitions from topic page to Resource Schedules June calendar.

Calendar 2

At this junction, there are a myriad of ways we could finish the schedule, and again, it's just going to come down to what works best for each of us or how we want to do it.

We are going to copy the Spanish 1 resource first and pretty much follow the same process we just completed with our blocks.

Click the SPANISH 1 row on June 8th.

Copy Modal 1

Click the Copy button.

Copy Modal 2

The Resource dropdown in the Copy Resource Schedule(s) modal, go ahead and click it…

<no audio> Click the Resource dropdown.

Copy Modal 3

…lists all of our agency's resources, again providing more flexibility within the modal.

We're going to stick with SPANISH 1.

Click the Resource dropdown to close it.

Copy Modal 4

The From Date and To Date specify all the dates with our selected resource's schedules that we want to duplicate.

This means that all of the SPANISH 1 schedules that exist on and between the two dates will be duplicated.

Since it duplicates the schedule, it will also copy the block.

We are only copying the 8th for SPANISH 1.

Go ahead and select the To Date from the dropdown calendar.

Copy Modal 5

<no audio> Select the To Date from the dropdown calendar.

<audio – hint> Select the 8th.

Copy Modal 6

Our Copy Schedule To options are…click the dropdown…

<no audio> Click the Copy Schedule To dropdown.

Copy Modal 7

…either another resource or another clinic.

We'll continue with resource. Click to close the dropdown.

<no audio> Click the Copy Schedule To dropdown.

Copy Modal 8

We can apply the schedules to…click the dropdown…

<no audio> Click the Apply Schedule To dropdown.

Copy Modal 8A

…any of our agency's other resources.

Like other dropdowns, we can choose more than one resource to apply it to at one time.

Even those resources that already have schedules are listed and this is because, as we'll see in one minute, we can use the copy function to overwrite existing schedules.

<Transition Slide>

<screen description – no audio> Slide transitions to grid.

Grid Revision

For instance, let's say we need another late schedule, so we're going to change our CPA 1 from 8 to 4 to 11 to 7, with the same block as SPANISH 1, on the second Thursday.

Copy Modal 9

Select CPA 1 then CPA 2 from the dropdown.

Copy Modal 10

<no audio> Select CPA 1 then CPA 2 from the dropdown.

Overwrite 1

The Overwrite toggle, as we've seen before, deletes the current schedule and replaces it with the new schedule as long the resource does not have any appointments or group education classes already scheduled.

Since we are replacing the CPA 1 schedule, we need to toggle on Overwrite.

Go ahead and toggle it o

Copy Modal 11

We want to keep the modal open. Click the Save button.

Waiting

<screen description – no audio> Spin icon displays.

Copy 1A

Next, we want to copy the Somali resource schedule for June 15th to CPA 2.

Since we aren't overwriting any hours, we should toggle it off.

<no audio> Select Somali, use the calendar controls to select June 15 for From and To Dates, select CPA 2 from Apply dropdown, toggle off Overwrite, and Save.

Copy 1B

<no audio> Select Somali, use the calendar controls to select June 15 for From and To Dates, select CPA 2 from Apply dropdown, toggle off Overwrite, and Save

Waiting

<screen description – no audio> Spin icon displays.

Copy 2A

Lastly, copy the RD schedule for June 22nd to CPA 2.

<no audio> Select RD, use the calendar controls to select June 22 for From and To Dates, select CPA 2 from Apply dropdown, and Save & Close.

Waiting

<screen description – no audio> Spin icon displays.

Edit Block 1

Click the button to continue.

Grid 3

To complete our calendar, we need to change CPA 2's block to 3 to 4.

Click the button to continue.

Edit Block 1A

Starting with June 8th, go ahead and do that. Click anywhere for a hint.

<audio – hint> Click the dark grey CPA 2 row on June 8th.

Edit Block 2

<audio – hint> Click the Edit button.

Edit Block 3

Use the clock icons in the Start and End Time fields and select 3:00 then 4:00 PM and Save.

Edit Block 4

<no audio> Use the clock icons in the Start and End Time fields and select 3:00 then 4:00 PM and Save.

Edit Block 5

We want to change the block for the third and fourth Thursdays as well.

How do we do we change the third Thursday? Click anywhere for a hint.

<audio – hint> Click the June 8, 2023, button to open the dropdown calendar.

Edit Block 5A

<no audio> Change the block for the third Thursday. Use the clock icon to select the Start then End Times. Click anywhere for a hint.

<audio – hint> Select the 15th.

Edit Block 5B

<no audio> Change the block for the third Thursday. Use the clock icon to select the Start then End Times. Click anywhere for a hint.

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

Edit Block 5C

<no audio> Change the block for the third Thursday. Use the clock icon to select the Start then End Times. Click anywhere for a hint.

<audio – hint> Select 3:00 PM.

Edit Block 5D

<no audio> Change the block for the third Thursday. Use the clock icon to select the Start then End Times. Click anywhere for a hint.

<audio – hint> Click the clock icon in the End Time field.

Edit Block 5E

<no audio> Change the block for the third Thursday. Use the clock icon to select the Start then End Times. Click anywhere for a hint.

<audio – hint> Select 4:00 PM.

Edit Block 5F

<no audio> Change the block for the third Thursday. Use the clock icon to select the Start then End Times. Click anywhere for a hint.

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

Edit Block 6

Last one. We need to change 4th Thursday as well. Get us started. Click anywhere for a hint.

<audio – hint> Click the June 15, 2023, button to open the dropdown calendar.

Edit Block 6A

<no audio> Get us started with changing the block for the 4th Thursday. Click anywhere for a hint.

<audio – hint> Select the 22nd.

Edit Block 6B

Just like Resource Schedules…

Click-and-Drag 1

…we can also click-and-drag the block to our desired time.

Edit Block 6C

Click the Save & Close button.

Waiting

<screen description – no audio> Spin icon displays.

Calendar Done

We have finished creating our June calendar for Clinic 166.

Click the button to continue.

Notes

Date 1

All dates in this section of the module are based on today's date being June 12, 2023.

<Transition Slide>

<screen description – no audio> Slide transitions to calendar page.

Note 1

Although we've mentioned this before, we want to note again, specifically with copying schedules that we can only copy resource schedules for today or future dates.

And if we try to use the Copy function for a past date…

…it's not available.

If we copy a schedule on a current or future date and think we can select or enter past dates…

Note 2

…when in the Copy modal, all dates prior to today are disabled in the From Date dropdown calendar and if we try to type a date before today into the From Date field…

Notes 3

…a message displays indicating the From Date cannot be less than today's date.

Click the button to continue.

<Transition Slide>

<screen description – no audio> Slide transitions to July calendar page.

Notes 4

One other thing to mention… this is the July schedule for clinic 166 and as we were creating it, we accidentally added the Somali and RD schedules to the 2nd Thursday instead of the 3rd and 4th, as well as a block to the 1st Friday instead of the 2nd.

Notes 5

As long as there are no conflicts, we can click-and-drag our schedules and blocks to different dates on this calendar.

\<Transition Slide\>

\<screen description – no audio\> Slide transitions to June Clinic 166 calendar page.

Next Module

In the next module, we will copy our June calendar for Clinic 166 to another clinic.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

We can copy a resource's schedule to another resource but only for the exact same dates and times.

Answer #1

The answer is True.

The copy function **duplicates** a resource's schedule and can be used to create the exact same schedule (dates, times and blocks) for another resource.

Multiple Choice Q#2

Which statement is true?

A. We can copy a resource schedule from one date to another date.

B. When we copy a resource schedule, if a block exists, it will also copy the block.

C. To copy a resource schedule from June 5th to June 7th, we have to select the resource row on June 5th in the calendar and enter June 7 into both the From and To Date fields.

D. Since there aren't any From and To Date fields when editing a resource schedule, we have to return to the calendar to be able to edit another resource schedule on a different date.

E. We can edit a resource schedule and its block while in the same modal.

Answer #2

The answer is B.

When we copy a resource schedule, it will copy both the schedule and the block.

Why the other statements are false:

A – The copy function duplicates an existing resource schedule and can only copy it to another resource for the same date and time.

C – We cannot copy a resource schedule from one date to another date.

D – Once in the "edit" modal, we can use the calendar button to select another date. Any resources scheduled for the selected date will display in the Resource dropdown.

E – Only copying treats the schedule and block as one entity. When editing, we have to select either the resource or the block on the calendar in order to edit it.

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.

Minnesota Department of Health - WIC Program, 625 Robert St N, PO BOX 64975, ST PAUL MN 55164-0975; 1-800-657-3942, health.wic@state.mn.us, www.health.state.mn.us; to obtain this information in a different format, call: 1-800-657-3942.

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