

# Calendar 4A – Adding/Deleting Resource Schedules - 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 managing Resource Schedules in WINNIE, the MN WIC Information System.

### Date

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

## Resource Schedules

### <Transition Slide>

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

### Overview 1

We are starting this module in the Clinic Schedule page for Clinic 166

Our focus is going to be Resource Schedules.

Resource schedules are appointment columns in WINNIE.

The days and hours allotted for appointments are defined solely by our scheduled resources.

In the next couple of modules, we are going to make changes to May 22<sup>nd</sup> by adding a resource, editing the hours of the CPA 1 schedule...

...click below the internal scroll bar...

### Overview 2

...deleting the second half of the CPA 1 schedule...

...again, click below the internal scroll bar...

### Overview 3

...and blocking time for lunches.

We've viewed the current schedules for May 22<sup>nd</sup>.

Now let's take a look at the 24<sup>th</sup>.

Click the Next button.

### Waiting

<screen description – no audio> Spin icon displays.

### Overview 4

Click the next button one more time.

### Overview 5

Click below the internal scroll bar.

### Overview 6

We are also going to delete these two resource schedules for CPA 1.

Not in that order, but that's the plan.

Let's change our view to Month.

<no audio> Click the Month button.

### Waiting

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

### Waiting

<screen description – no audio> Spin icon displays – calendar generates with appointments.

### Month View 1

Click below the scroll bar twice...

### Month View 1A

...then click the Next button to view June.

## Waiting

<screen description – no audio> Spin icon displays – calendar generates for June.

## Month View 3

We are also going to complete our calendar for June, which doesn't have any resource schedules yet.

Let's return to the calendar. Go ahead. Click anywhere for a hint.

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

## Return to Calendar 1

<audio – hint> Select the Agency Administration module.

## Schedule Resources

Once we have Appointment Types, Resources, and Holidays and Events, we are ready to start scheduling our resources.

We use resource schedules to create our clinic calendars.

Click Resource Schedules on the sidebar.

## Waiting

<screen description – no audio> Spin icon displays.

## Clinics 1

The clinic we were working in while in the Clinic Services module will be the default clinic in the Clinic dropdown when we open Agency Admin.

It functions the same navigating from Agency Admin to Clinic Services.

## <Transition Slide>

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

## Preparing

All agencies have their own methods for scheduling staff, and may create the schedule daily, weekly, monthly or for months at a time.

It's whatever works.

The following are just some tips that might help get us started.

If we have generic names, we may be able to keep the schedules more consistent, which will make it easier to create, and copy, our schedules.

If we have resources with the same schedules, we can create their schedules at the same time.

The more varied our days, times, and staff schedules, the longer it may take to create our calendar.

Before adding the resource schedules, we might want to create a staffing “grid” for each of our clinics.

## Sample Grid

A sample grid is available in the Calendar Worksheet on the MDH WIC website.

If we want, we can use it to develop our calendar before we create it in WINNIE.

Click the button to continue.

## Schedules 1

The Resource Schedules panel is where we create our appointment columns.

As we do that, they will populate in the Calendar below.

Let’s click the Toggle Panel icon to collapse the Resource Schedules panel.

## Calendar 1

The view looks very similar to the Holidays and Events calendar.

Notice that scheduled events display on this calendar also.

Resource schedules in the past show on the calendar but changes cannot be made to them.

## Calendar 1A

If we click on one of the past resource rows...

<no audio> Click on the CPA 4 8:00-4:00 PM row.

## Past Schedules

...a modal opens that simply displays the schedule information.

Click the Close button.

## Calendar 2

We already reviewed the changes we are going to make for May, but we’ll do them in the following order.

First, we'll add our Somali resource to Monday from 8AM to 4PM.

Second, we are going to delete CPA schedules on Monday and Wednesday.

Third, we'll create one CPA 1 schedule on Monday.

Lastly, we'll block some time for lunch for each resource on Monday.

Let's re-expand the Resource Schedules panel by clicking the Toggle Panel icon again.

WIC STAFF: We have some updating to do to this month's calendar...

## Clinic 2

When creating our resource schedules, we must create them for a specific clinic.

Although we can't immediately apply schedules to multiple clinics, as we'll see later, we can duplicate them for other resources and clinics.

Were creating our calendar for Clinic 166 so we'll leave it as-is.

## Resource Groups 1

Resource Groups are a feature that MN WIC, at this time, will not fully utilize.

Go ahead and click the dropdown.

<no audio> Click the Resource Groups dropdown.

## Resource Groups 2

We said fully utilize because there is one default group available called General Staff.

Unfortunately, other groups can only be created by the state and MN state WIC is not involved in maintaining agency calendars.

But we can use General Staff as a shortcut if we want to select all our resources at once.

Select General Staff.

## Resource Groups 3

All our currently active Resources are auto selected.

We can pare down the resources individually by clicking the x next to the resource name, which removes General Staff from the Resources Group.

## Resource Groups 4

We can also delete the General Staff, and clear the Resources field, by clicking the x in the Resource Groups dropdown.

Go ahead and do that.

## Resources 1

At least one resource must be selected.

As we said before, we are going to start by simply adding one resource, Somali 1, to Monday, May 22.

Click the Resources dropdown.

## Resources 2

If we are a keyboard enthusiast, we can also type into the dropdown until our option is selected and then press Enter.

Type an “s”.

## Resources 3

Since Spanish is highlighted, if we pressed Enter now, it would select SPANISH 1 but we want Somali 1 so let’s type an “o”...

## Resources 4

...and press the Enter key on the keyboard.

## Dates 1

We also must specify the dates for our new schedules.

The From Date and To Date can be today, regardless of the time, or a future date.

Click the calendar control in the From Date field.

## Dates 2

Select May 22<sup>nd</sup>.

## Hours by Day 1

The same date auto-fills the To Date, and we’re good with that.

The Resources Hours by Day section should look partly familiar.

We saw the Day and Weeks of Months columns when adding our holidays and events and should already be familiar with the concept of WIC Weeks.

We need to select the day and WIC Week for our new schedule, even though it’s only one date and already specified, as well as defining the Start and End Times.

## Hours by Day 2

Here's a little shortcut that we can sometimes use.

Let's say, like now, we just want to quickly add one resource to a specific date.

In this instance, we can just apply to all days and weeks.

So, let's do that.

The Select toggle toggles all the days on. Click that.

<no audio> Click the Select toggle.

## Hours by Day 3

Click the first Weeks of Month dropdown.

## Hours by Day 4

Ah yes. Remember this odd-looking thing?

Let's Select All.

## Hours by Day 5

We'll get to this icon in a minute.

Click into the top Start Time field.

## Hours by Day 6

Our schedule is going to be from 8:00 AM to 4:00 PM

Type 8:00 AM then click or Tab into the End Time field.

## Hours by Day 7

Type 4:00 PM.

## Hours by Day 8

OK. Back to what looks like a Copy icon.

Go ahead and hover over the top icon.

Click the button to continue.

## Hours by Day 9

If we were to click Save, after having selected all of the days, validation messages would display beneath every empty field.

If we select a day, we must complete the row.

## Copy Icon 1

The Copy to All Blank Rows icon does just that.

It copies the current values in that specific row to any other rows that are completely blank.

And it seems to only work once.

## <Transition Slide>

<screen description – no audio> Slide transitions to Resource Schedules page with 3<sup>rd</sup> week selected for Wednesday.

## Copy Icon 2

If we selected 3<sup>rd</sup> week for Wednesday and clicked the Copy icon in that row, 3<sup>rd</sup> would copy into all the blank Weeks of Months fields.

If we then added 12-4PM in the Monday row, and clicked that row's Copy icon, nothing happens despite there still being blank fields.

## <Transition Slide>

<screen description – no audio> Slide transitions to Resource Schedules page without other fields completed.

## Copy Icon 3

Click the Copy to All Blank Rows icon in the top row.

## Copy Icon 4

Go ahead and click Save.

## Waiting

<screen description – no audio> Spin icon displays.

## Calendar 3

Notice that after saving, all of our settings are maintained.



This allows us to make adjustments, or create another schedule, without having to select everything all over again.

Go ahead and collapse the Resource Schedules panel. Click anywhere for a hint.

<audio – hint> Click the Toggle Panels icon (minus sign) in top right of Resource Schedules header.

## Calendar 4

Although we applied it to all days, the date is the limiting factor, which we specified as May 22.

Anyway, a handy shortcut sometimes.

We've completed our first objective.

## Calendar 5

Next, we want to delete the CPA 1 schedules on Monday and Wednesday

Let's start by clicking on the CPA 1 9:00 AM – 12:30 PM row on May 22<sup>nd</sup>.

## Schedule Modal 1

The Schedule modal opens displaying the resource name, date, and time period.

With a single click on the calendar, we can edit, copy, block or delete resource schedules.

The Delete Selected button deletes the specific row we clicked on, and we'll see this in a minute.

The Delete button opens another modal. Click that one.

<no audio> Click the Delete button.

## Delete Modal 1

The Resource and Date we clicked on default populate but a nice feature is that we aren't completely locked into whatever we clicked on.

## Delete Modal 1A

We can use the dropdown calendar to select a different date, which will populate the Resource dropdown with the resources scheduled on the selected date.

We'll see that later.

For now, let's click the Resource dropdown.

## Delete Modal 2

We can also select another resource scheduled for the same date we clicked.

If we click the calendar control in the From Date field...

## Delete Modal 3

...we can enter any date from today forward.

Click the calendar control again to close the dropdown.

<no audio> Click the calendar control in the From Date field.

## Delete Modal 4

When we select the Delete button, both schedules on May 22<sup>nd</sup> for CPA 1 display.

Click below the scrollbar to see the second schedule.

## Delete Modal 5

This means both schedules will be deleted since we can't specify the time.

In this instance, that's fine.

We are going to create a new schedule anyway, but it's something to be aware of.

Let's take a look at the calendar within this modal.

Click the Next button.

## Delete Modal 6

No schedules.

Notice our Resource dropdown and default date disappeared.

Click the Next button again.

## Delete Modal 7

And click below the scroll bar to view the second schedule on May 24<sup>th</sup>.

## Delete Modal 8

OK. Let's specify our date range.

Our date range is 5/22 to 5/24. Using the calendar controls, go ahead and select those dates.

Click anywhere for a hint.

<audio – hint> Click the Calendar icon in the From Date field.

## Delete Modal 9

<audio – hint> Select May 22<sup>nd</sup>.

## Delete Modal 10

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

## Delete Modal 11

<audio – hint> Select May 24<sup>th</sup>.

## Delete Modal 12

We can use the same shortcut and Select All since our dates are during just one week, which means we don't have to specify the WIC week.

Toggle on Select.

## Delete Modal 13

Notice this time, since we don't specify a time period when deleting, toggling on Select also auto-populates all the Weeks of the Month.

Let's see what happens when we save by clicking the Delete Selected button.

<no audio> Click the Delete Selected button.

## Delete Confirm 1

We are sure. Click the Yes button.

## Delete Info 1

When we try to delete a resource schedule, the system will assess if any appointments have been scheduled.

If appointments exist, the Information message displays a bulleted list of any dates that have conflicts and will not delete the resource's schedule(s) for that date.

Click the OK button.

## Calendar 6

Since it was going to delete both the 9-12:30 and 1-4:30 schedules, it didn't delete either of them due to the appointment conflict.

However, it did delete our schedules on the 24<sup>th</sup>.

Let's check if both these schedules have appointments.

We can do that from here using the Edit function.

Click the first CPA 1 row again.

<no audio> Click the CPA 1 9:00 AMN – 12:30 PM row on 5/22.

## Schedule Modal 2

Click the Edit button.

## RS Modal 1

Edit opens the Resource Schedule(s) modal where we can see if appointments have been scheduled.

Click below the scrollbar.

## RS Modal 2

We can see there are no appointments for the 1:00-4:30 row.

Go ahead and click Cancel.

## Waiting

<screen description – no audio> Spin icon displays.

## Calendar 7

This time let's click the CPA 1 1:00-4:30 PM row on May 22<sup>nd</sup>.

## Schedule Modal 3

Delete Selected button will delete the resource row we clicked on in the calendar, assuming there aren't any appointments scheduled, which we verified there aren't.

Go ahead and click that button.

<no audio> Click the Delete Selected button.

## Delete Confirm 2

Yes. We are sure.

<no audio> Click the Yes button.

## Waiting

<screen description – no audio> Spin icon displays.

## Calendar 8

OK. We've deleted the CPA 1 schedule from May 24<sup>th</sup> and one of them from the 22<sup>nd</sup>.

We'll continue revising the resource schedules for clinic 166 in the last week in May in the next module.

## Test Your Knowledge

### T/F Q#1

True or False?

The Select All shortcut (where we toggle on all days and all weeks) can be used when we have to define multiple days across multiple weeks.

### Answer #1

The answer is False.

The Select All shortcut in which we toggle on all days and all weeks can be used when we have a specific date defined or are making the same changes to multiple days occurring within the same week.

## 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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