

Calendar 4C – Create Calendar - 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 a calendar in WINNIE, the MN WIC Information System.

Date

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

Create Calendar

<Transition Slide>

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

Overview 1

We are going to create the June resource schedules for Washington County clinic 166 and Cottage Grove 167.

<Transition Slide>

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

Grid 1

We've completed our June staffing grid using the calendar worksheet for Clinic 166 where our first week starts on Thursday, June 1, and ends on Wednesday, June 7.

Click the button to continue.

Grid 2

June grid for Clinic 167.

Click the button to continue.

Agency Admin 1

We are back in Agency Administration.

Open Resource Schedules.

Waiting

<screen description – no audio> Spin icon displays.

Clinic 1

First, we always want to verify we are creating a calendar for the right clinic.

Clinic 166. Check.

We are creating it for June so let's click the Next button in the Calendar panel to view June.

Create 1

There are lots of ways to approach creating a calendar and it really is all about identifying the way that works best for each of us.

We are going to use our grid for reference, and we are going to start with resources that have the exact same schedule and get those on the calendar, and maybe it works for us to highlight them on the grid.

We'll start with CPA 1, scheduled every Tuesday and Thursday, including the 5th Thursday, from 8-4 with an 11-12 block.

Schedule 1-2

Select CPA 1 from the Resources dropdown. Don't use hot keys...actually we won't use any hot keys for the rest of these modules.

Schedule 3-7

Select June 1 and June 30 for the From Date and To Date. Use the calendar control in each date field and the right arrow icon inside the calendar dropdown.

Schedule 8-9

Our days are Tuesdays and Thursdays. Toggle Tuesday then Thursday on.

Schedule 10-11

Click Thursday's Weeks of Month dropdown and Select All.

Schedule 12-14

We are going to complete Thursday.

Type 8:00 AM for the Start Time and type 4:00 PM for the End Time.

Schedule 15

If we want to copy our Thursday details to Tuesday's row, what do we do? Go ahead.

Click anywhere for a hint.

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

Schedule 16

Let's save our Resource Schedule.

Waiting

<screen description – no audio> Spin icon displays.

Calendar 1

Go ahead and collapse our Resource Schedules panel to view the June calendar.

Click anywhere for a hint.

<audio – hint> Click the minus sign icon to the far right of the Resource Schedules header.

Calendar 2

Click the button to continue.

Grid 3

We'll finish CPA 1 by adding the 11AM-12PM block.

Click the button to continue.

Block 1

We'll start by adding the block to the June 1 schedule. How do we add a block to the first?

Click anywhere for a hint.

<audio – hint> Click the CPA 1 row on June 1st in the calendar.

Block 2

<no audio> Add a block to the June 1 resource schedule. Click anywhere for a hint.

<audio – hint> Click the Block button.

Block 3-4

Our block is the same for all the days we've defined for CPA 1.

Use the calendar control to select June 30 for our To Date.

Block 5

Can we use our shortcut? Click Yes or No.

<audio – hint> We can use our short cut since our schedules for CPA 1 are the only days defined and we want to apply the same block to all of them.

Shortcut 1

Apply the shortcut. Click anywhere for a hint.

<audio – hint> Toggle on Select.

Shortcut 2

<no audio> Apply the shortcut. Click anywhere for a hint.

<audio – hint> Click the Sunday Weeks of Month dropdown.

Shortcut 3

<no audio> Apply the shortcut. Click anywhere for a hint.

<audio – hint> Select Select All.

Block 6-8

Type 11:00 AM into the Start Time field and type 12:00 PM into the End Time field.

Block 9

How do we finish off our shortcut. Click anywhere for a hint.

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

Block 10

We've added the block. Save & Close.

Waiting

<screen description – no audio> Spin icon displays.

Info Msg 1

Remember, our resource schedules define our business days.

Since we selected all of them, this message indicates the days that don't have a schedule yet.

Click OK.

Calendar 3

Click the button to continue.

Grid 4

Next, let's finish our CPA 1 schedules for Fridays from 10-2.

Notice, we'll need to adjust the 4th Friday.

Click the button to continue.

Calendar 3A

Go ahead and re-expand the Resource Schedules panel. Click anywhere for a hint.

<audio – hint> Click the + sign icon to the far right of the Resource Schedules header.

Schedule 2A-2D

All of our previously inputted information is still available.

Our resource and dates are fine, but we need to adjust our days and times.

Toggle off Tuesday and Thursday, toggle on Friday, select All Weeks, type 10:00 AM into the Start Time and 2:00 PM into the End Time, then click Save.

Schedule 2B-2D

<no audio> Toggle off Tuesday and Thursday, toggle on Friday, select All Weeks, type 10:00 AM into the Start Time and 2:00 PM into the End Time, then click Save.

Waiting

<screen description – no audio> Spin icon displays.

Schedule 2E

Collapse the Resource Schedules panel.

Schedule 2F

Remember, the system allows us to overlap partial-day events.

Grid 4A

So, now we just need to adjust 4th Friday to 2:00PM to 4:30PM.

Schedule 2F-1

Go ahead and do just that, typing the times into the fields. Click anywhere for a hint.

<no audio> Adjust 4th Friday to 2:00 PM to 4:30 PM, typing the times into the Start and End Time fields. Click anywhere for a hint.

<audio – hint> Click the CPA 1 row on June 23rd.

Schedule 2G

<no audio> Adjust 4th Friday to 2:00 PM to 4:30 PM, typing the times into the Start and End Time fields.

<audio – hint> Click the Edit button.

Schedule 2H

<no audio> Adjust 4th Friday to 2:00 PM to 4:30 PM, typing the times into the Start and End Time fields.

<audio – hint> Click into the Start Time field.

Schedule 2I

<no audio> Adjust 4th Friday to 2:00 PM to 4:30 PM, typing the times into the Start and End Time fields.

<audio – hint> Type 2:00 PM then click or tab into the End Time field.

Schedule 2J

<no audio> Adjust 4th Friday to 2:00 PM to 4:30 PM, typing the times into the Start and End Time fields.

<audio – hint> Type 4:30 PM into the End Time field.

Schedule 2K

<no audio> Adjust 4th Friday to 2:00 PM to 4:30 PM, typing the times into the Start and End Time fields.

<audio – hint> Click the Save & Close button.

Waiting

<screen description – no audio> Spin icon displays.

<Transition Slide>

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

Grid 5

Now let's add our BF Peer and RD schedules to Tuesdays from 10 to 2.

Click the button to continue.

Calendar 4

Go ahead and re-expand the Resource Schedules panel.

<audio – hint> Click the + sign icon to the far right of the Resource Schedules header.

Schedule 3A

This time, we need to change a few things. Let's start with resources.

Delete CPA 1 and select BF Peer then RD from the Resource dropdown list.

Schedule 3B

<no audio> Delete CPA 1 and select BF Peer then RD from the Resource dropdown list.

Schedule 3C

These schedules are for each Tuesday from 10 to 2.

Let's toggle on Tuesday, use the Copy to All Blank Rows icon in Friday's row, then toggle of Friday, and Save.

Schedule 3D

<no audio> Toggle on Tuesday, use the Copy to All Blank Rows icon in Friday's row, then toggle of Friday, and Save.

Waiting

<screen description – no audio> Spin icon displays.

Calendar 5

Let's checkout our calendar. Collapse the Resource Schedules panel.

<audio – hint> Click the minus sign icon to the far right of the Resource Schedules header.

Calendar 6

Click the button to continue.

Grid 6

Next, we're going to add our RD, Somali, and Spanish schedules to the 4th, 3rd, and 2nd Thursdays (in that order) from 11 to 7.

Click the button to continue.

Calendar 7

Expand the Resource Schedules panel.

<audio – hint> Click the plus sign icon to the far right of the Resource Schedules header.

Schedule 4A-4C

We want to start with the RD resource so delete BF Peer, toggle on Thursday, select 4th week, type 11:00 AM into the Start Time field, type 7:00 PM into the End Time field, toggle off Tuesday, and Save.

Schedule 4B-4C

<no audio> Delete BF Peer, toggle on Thursday, select 4th week, type 11:00 AM into the Start Time field, type 7:00 PM into the End Time field, toggle off Tuesday, and Save.

Waiting

<screen description – no audio> Spin icon displays.

Schedule 5A

Let's repeat that process for our Somali resource on the third Thursday.

Delete RD, Select Somali, change the week to 3rd, and Save.

Schedule 5B

<no audio> Delete RD, Select Somali, change the week to 3rd, and Save.

Schedule 6A

One more time for the Spanish resource on the 2nd Thursday.

Delete Somali, Select Spanish, change the week to 2nd, and Save.

Schedule 6B

<no audio> Delete Somali, Select Spanish, change the week to 2nd, and Save.

Calendar 8

Collapse the Resource Schedules panel.

<audio – hint> Click the minus sign icon to the far right of the Resource Schedules header.

Grid 7

In the next module, we'll continue to create the June calendar for clinic 166 and take a look at the copy function.

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.

CALENDAR 4C

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