Calendar 3B – Holidays & Events – 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 a continued overview of adding Holidays and Events in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being May 8, 2023.

Holidays and Events Continued

<Transition Slide>

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

Calendar 1

In the previous training module, we added our all-day holiday and partial-day events.

All events for each clinic are listed in the left panel and a scroll bar will display if appropriate.

Our holidays and events also display on the calendar.

We can view the months one-by-one using the arrows or use the dropdown to jump to a specific month.

Click the right arrow.

Calendar 2

Now click the dropdown.

Calendar 3

Select December.

Calendar 4

Notice as we jump from month to month, the information in the panel remains the same.

Click the calendar dropdown again.

Calendar 5

We can view a different year by clicking the Up arrow to see previous years and the down arrow to see future years.

Let's go back to May.

<no audio> Select May.

Icons 3

There are additional icons with recurring events, or a series of events.

Go ahead and hover over the icons in the first All Staff Meeting section.

Click the button to continue.

<screen description – no audio> Tooltips for Edit Series, Edit, Delete and Delete Series.

Icons 4

We created a series of events when we scheduled our recurring all staff meeting for every 4th Friday at all clinics.

Icons 5

With events that are part of a series, the original Edit and Delete icons continue to function in the same way, that is, all-or-nothing.

If we edit or delete a single event that is part of a series, this event will be edited or deleted at all clinics where it is scheduled.

Let's click the Edit icon for the May All Staff Meeting.

Single Edit 1

Since we are editing a single event, notice that only non-recurring functionality can be edited.

Remember the conflict message informing us that an appointment was scheduled at clinic 236 that conflicted with this partial-day event?

Because of this conflict, the system has automatically removed the TeleWIC clinic (clinic 236) from the Apply to Clinics list for the May 26 meeting.

Since this meeting is just before a holiday weekend, we are going to change the End Time to 11:30 AM.

Click into the End Time field.

> WIC STAFF: Hmmm. Just before a holiday weekend. We'd better shorten this meeting to 11:30 AM.

Single Edit 2

Type 11:30 AM.

Single Edit 3

And click Save.

<no audio> Click the Save button.

Single Delete 1

Now our May staff meeting ends at 11:30 instead of 1:30 like the rest of the recurring events.

If we need to delete one of the events in a series, at all the clinics where it's scheduled, we click its Delete icon.

November 24 is the day after Thanksgiving so we have to delete that meeting.

Click the November 24 All Staff Meeting Delete icon.

> WIC STAFF: Arrgh. 11/24/23 is the day after Thanksgiving. That's not going to work.

Single Delete 2

Click Yes.

<no audio> Click the Yes button.

Series Icons 1

The Edit Series and Delete Series icons function the same as the Edit and Delete for a single event, that is to say, all-or-nothing.

Any changes we make to one event in the series impacts all the scheduled events in the series.

Clicking any of the Delete Series icons…go ahead and click one of them…

<no audio> Click one of the Delete Series icons (2nd garbage can icon).

Series Delete 1

…will delete all of them.

We don't want to so that, so click No.

<no audio> Click the No button.

Series Edit 1

The Edit Series icons…go ahead and click one of them between June and December…

Series Edit 2

…opens the modal with all fields enabled except for the Recurring toggle.

We can edit anything but keep in mind that any change will impact **all** events in our series, even those we may have already edited as a single event.

Let's take at look at some changes we might think to make.

What if we wanted to change our End Time to 1:00? We already edited our May 26 meeting to end at 11:30.

So, what do we think happens?

Series Edit 2A

Yep. It changes all the events to 1:00, including our May meeting.

<screen description – no audio> Screen transitions back to Holiday or Event Series modal.

Series Edit 3

What if we changed the start date to after the 4th Friday in May? Would that only change the events after May 26?

Series Edit 3A

Nope. Now the series starts after the 26th so it deletes the May 26 event.

Editing Series

If we change the Recurring Until Date to an earlier date, any events that occur after that date will be deleted.

If we remove any clinics, the whole series of events will be deleted from those clinics.

If we change the week and day, it will apply to all events at all clinics.

Getting the idea? All or nothing.

A good rule of thumb: we should use Recurring only for events that are very consistent and won't require much editing.

Otherwise, create individual events, even going so far as creating them for each clinic, since it allows a lot more flexibility if editing is required.

Go ahead and Cancel.

<no audio> Click the Cancel button.

Verify 1

These are the edits we've made.

▪ Changed the end time for the May All Staff Meeting to 11:30AM.

▪ Added "-closed" to our original Memorial Day holiday.

▪ Deleted the November All Staff Meeting.

▪ Conflict at the TeleWIC Appointment clinic means no May staff meeting.

▪ Deleted Memorial Day holiday from TeleWIC Appointment clinic.

Verify 1A

Let's take a minute to verify our holidays and events.

Hover over the All Staff Meeting on the 26th and the Memorial Day holiday on the 29th.

Click the button to continue.

Verify 2

We know Clinic 166 is good to go.

Next, using the calendar dropdown, let's view November. Click anywhere for a hint.

<audio – hint> Click the May 2023 button to open the calendar.

Verify 3

<audio – hint> Select November.

Verify 4

As expected, no All-Staff Meeting.

Next, let's view the other clinic calendars.

Click the Clinic dropdown.

Verify 5

Select Clinic 167 – Cottage Grove.

Verify 6

No November meeting.

We're going to assume the other clinics are good for November so let's go back to May.

We can also jump back to the current month by clicking the Today button.

Go ahead and click it.

<no audio> Click the Today button.

Verify 7

Remember, we can also click the date to see the details.

Hover over the event on the 29th and click the 26th.

<no audio> Click May 26.

Verify 8

Meeting until 11:30. Click Close.

Verify 9

Let's check out Clinic 168. Click anywhere for a hint.

<audio – hint> Click the Clinic dropdown in the header.

Verify 9A

<audio – hint> Select Clinic 168 - FOREST LAKE.

<no audio> Go to Clinic 168. Click anywhere for a hint.

Verify 10

Clinic 168 looks good.

Go ahead and hover over the dates with our events then switch to Clinic 236, our TeleWIC Appointment Clinic. Click anywhere for a hint.

<audio – hint> Click the Clinic dropdown in the header.

Verify 11

<audio – hint> Select Clinic 236 - TeleWIC Appointment.

<no audio> Hover over the dates with our events then switch to Clinic 236, our TeleWIC Appointment Clinic. Click anywhere for a hint.

Verify 12

And as expected, neither the All Staff Meeting nor Memorial Day display on the May calendar.

It may not have been obvious before, but the holidays and events panel only display the holidays and events that apply to our selected clinic.

There is one last thing, but first let's go back to Clinic 166.

<audio – hint> Click the Clinic dropdown.

Verify 12A

<audio – hint> Select Clinic 166 – WASHINGTON COUNTY.

Calendar 6

The calendar defaults to the month-view based on today's date.

If we click the Week button…

Calendar 7

…the week with today's date displays along with hours.

Notice our hours start at 12:00AM and we will have to scroll to see typical clinic hours.

The previous and next buttons shift our calendar based on the selected time period.

Go ahead and click the Next button.

Calendar 8

Just like in Month view, we can click a date in Day or Week view to open the Add modal.

Click the highlighted cell in the Wednesday, May 17, column.

Calendar 9

Click the Cancel button.

Calendar 10

We can click the dropdown calendar to view a specific date within our week view.

Click the dropdown calendar.

Calendar 11

The current date is highlighted as well as the last date we selected on the calendar.

Select the 26th.

Calendar 12

To see our event, we have to scroll.

Click below the scroll bar.

Calendar 13

Hover over the event and then click it.

Calendar 14

Same Event modal and functionality.

Click Close.

<no audio> Click the Close button.

Calendar 15

Lastly, click the Day button.

Calendar 16

Notice that when we switch our view it retains our position in time.

The Day view also has the same functionality.

Hover over it, then click the event.

Calendar 17

Click the Close button.

Calendar 18

Let's return to the Clinic Services module to view our events on the Scheduler pages.

Go ahead. Click anywhere for a hint.

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

Module Launcher

<no audio> Return to the Clinic Services module. Click anywhere for a hint.

<audio – hint> Click the Clinic Services module.

Search

Click the Clinic Schedule on the sidebar.

Waiting

<screen description – no audio> Spin icon displays.

Change Clinic 1

We are going to look at Clinic 167.

Click the Clinic dropdown.

Change Clinic 2

Select Clinic 167 – COTTAGE GROVE.

Waiting

<screen description – no audio> Spin icon displays.

Scheduler 1

Let's select one of our event dates from the calendar dropdown.

Click the dropdown.

Scheduler 2

Select the 26th.

Waiting

<screen description – no audio> Spin icon displays.

Scheduler 3

Since this is a partial-day event, as long as there are no appointments for any of the previously scheduled Resources, the event blocks off that time period during the Resource Schedules.

Appointments cannot be scheduled that overlap the time of the event or during the event.

Collapse the Scheduler panel by clicking the minus sign icon in the top right of the panel's header.

Scheduler 4

Since there aren't any appointments yet, the Appointment Type Legend displays only Event, and its assigned color is light blue.

Click the calendar dropdown again.

Scheduler 5

Select the 29th.

Waiting

<screen description – no audio> Spin icon displays.

Scheduler 6

All-day events are currently labeled Holiday in the legend and their assigned color is pink.

Notice that it blocks the whole day off; there is nothing available.

Since resources cannot be scheduled on days that have All-Day holidays or events, it displays differently from partial-day events that show on the calendar.

<Transition Slide>

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

Test Your Knowledge

T/F Q#1

True or False?

Using the Edit Series icon, we can update the start time for one of the events in a series.

Answer #1

The answer is False.

We can use the Edit icon to update the start time for one of the events in a series. The Edit Series icon will update the start time for all events in the series.

T/F Q#2

True or False?

If we change the Recurring End Date from 12/31/23 to 10/31/23, all events scheduled after 10/31/23 will be deleted.

Answer #2

The answer is True.

Any edits to series will impact all of the events. Events are scheduled until the Recurring End Date and if this is changed to an earlier date, any events after that date are automatically deleted.

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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