

The screenshot displays the 'Financial Period Management' interface. At the top, there is a menu bar with 'Help', 'Submit', 'Quit', 'Functions', and 'Comments'. Below the menu is a navigation bar with various icons. The main content area is titled 'Financial Period Management' and includes a 'Link' button. Underneath, there are 'Financial Period Controls' with several input fields: 'Fin Period' (Financial Year), 'Description' (2010), 'Current Active' (Mar 2010 @ 113), 'Main Period From' (Jan 2010 @ p 108), 'Main Period Ends' (Dec 2010 @ p 119), and 'Interpret P&L' (N).

Period #	Descr	Real?	Starts	Ends	Status
1	2 Apr 2000	y	01/04/2000	30/04/2000	Fixed
2	3 May 2000	y	01/05/2000	31/05/2000	Fixed
3	4 Jun 2000	y	01/06/2000	30/06/2000	Fixed
4	5 Jul 2000	y	01/07/2000	31/07/2000	Fixed
5	6 Aug 2000	y	01/08/2000	31/08/2000	Fixed
6	7 Sep 2000	y	01/09/2000	30/09/2000	Fixed
7	8 Oct 2000	y	01/10/2000	31/10/2000	Fixed
8	9 Nov 2000	y	01/11/2000	30/11/2000	Fixed
9	10 Dec 2000	y	01/12/2000	31/12/2000	Fixed
10	11 Jan 2001	y	01/01/2001	31/01/2001	Fixed
11	12 Feb 2001	y	01/02/2001	28/02/2001	Fixed
12	13 13th Period	n	01/03/2001	28/02/2001	Fixed
13	14 Mar 2001	y	01/03/2001	31/03/2001	Fixed
14	15 Apr 2001	y	01/04/2001	30/04/2001	Fixed
15	16 May 2001	y	01/05/2001	31/05/2001	Fixed
16	17 Jun 2001	y	01/06/2001	30/06/2001	Fixed
17	18 Jul 2001	y	01/07/2001	31/07/2001	Fixed
18	19 Aug 2001	y	01/08/2001	31/08/2001	Fixed
19	20 Sep 2001	y	01/09/2001	30/09/2001	Fixed
20	21 Oct 2001	y	01/10/2001	31/10/2001	Fixed
21	22 Nov 2001	y	01/11/2001	30/11/2001	Fixed

## Slide 1

Slide notes: In this tutorial we will see how to ARCHIVE a Period. That is the process of 'rolling the Period OUT' and off the system, so that the Balances are retained but the on-line Transactions are no longer present. Here, we notice on the Main Period record that the oldest Period that is on-line is Period number 2. In other words, Period number 1 was rolled out some time before.

Financial Period Management

Financial Period Controls

Fin Period: 2010  
Description: 2010  
Current Active: Jan 2010 (p 119)

Main Period From: Jan 2010 (p 108)  
Main Period Ends: Dec 2010 (p 119)  
Interpret PSL: n

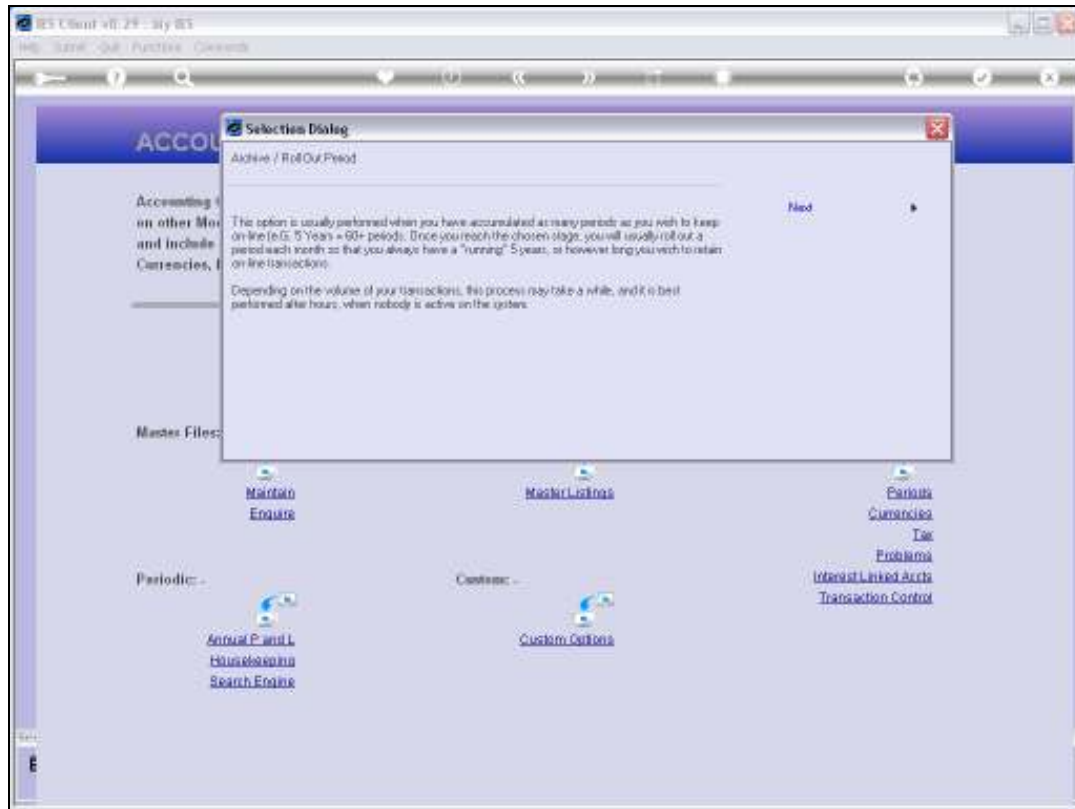
Period #	Descr	Real?	Starts	Ends	Status
1	2 Apr 2000	y	01/04/2000	30/04/2000	Fixed
2	3 May 2000	y	01/05/2000	31/05/2000	Fixed
3	4 Jun 2000	y	01/06/2000	30/06/2000	Fixed
4	5 Jul 2000	y	01/07/2000	31/07/2000	Fixed
5	6 Aug 2000	y	01/08/2000	31/08/2000	Fixed
6	7 Sep 2000	y	01/09/2000	30/09/2000	Fixed
7	8 Oct 2000	y	01/10/2000	31/10/2000	Fixed
8	9 Nov 2000	y	01/11/2000	30/11/2000	Fixed
9	10 Dec 2000	y	01/12/2000	31/12/2000	Fixed
10	11 Jan 2001	y	01/01/2001	31/01/2001	Fixed
11	12 Feb 2001	y	01/02/2001	28/02/2001	Fixed
12	13 13th Period	n	01/03/2001	28/02/2001	Fixed
13	14 Mar 2001	y	01/03/2001	31/03/2001	Fixed
14	15 Apr 2001	y	01/04/2001	30/04/2001	Fixed
15	16 May 2001	y	01/05/2001	31/05/2001	Fixed
16	17 Jun 2001	y	01/06/2001	30/06/2001	Fixed
17	18 Jul 2001	y	01/07/2001	31/07/2001	Fixed
18	19 Aug 2001	y	01/08/2001	31/08/2001	Fixed
19	20 Sep 2001	y	01/09/2001	30/09/2001	Fixed
20	21 Oct 2001	y	01/10/2001	31/10/2001	Fixed
21	22 Nov 2001	y	01/11/2001	30/11/2001	Fixed

Slide 2  
Slide notes:



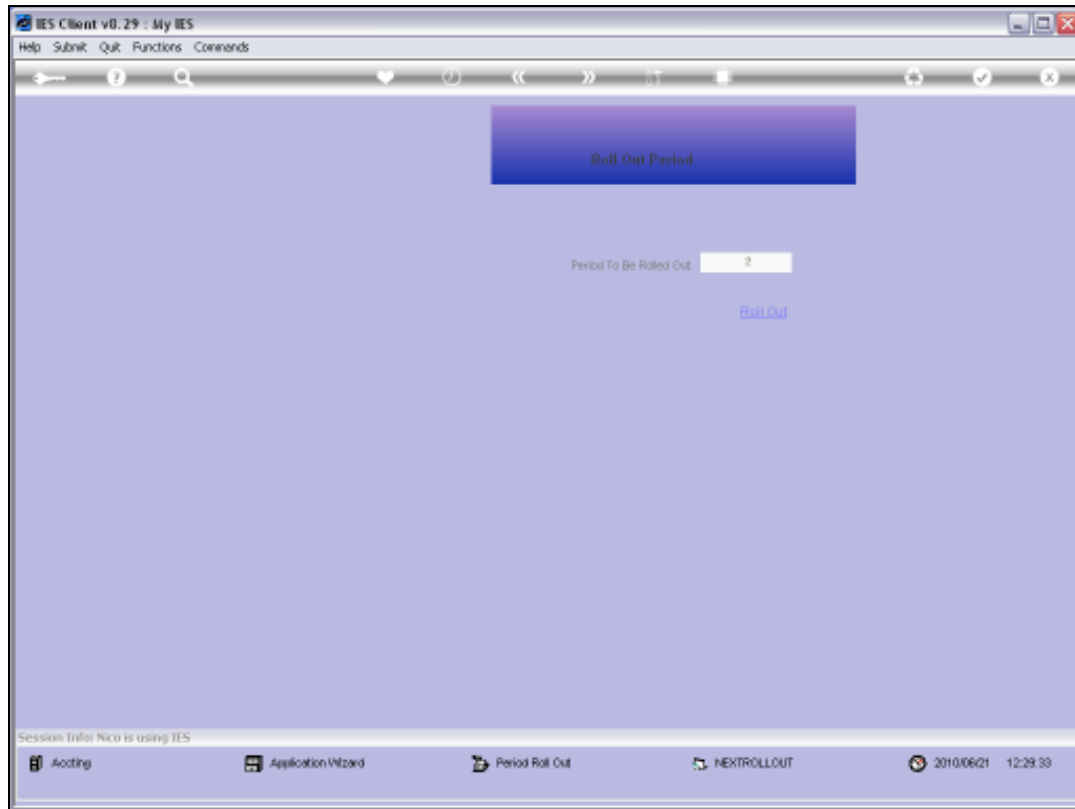
Slide 3

Slide notes: We choose the option to ARCHIVE a Period.



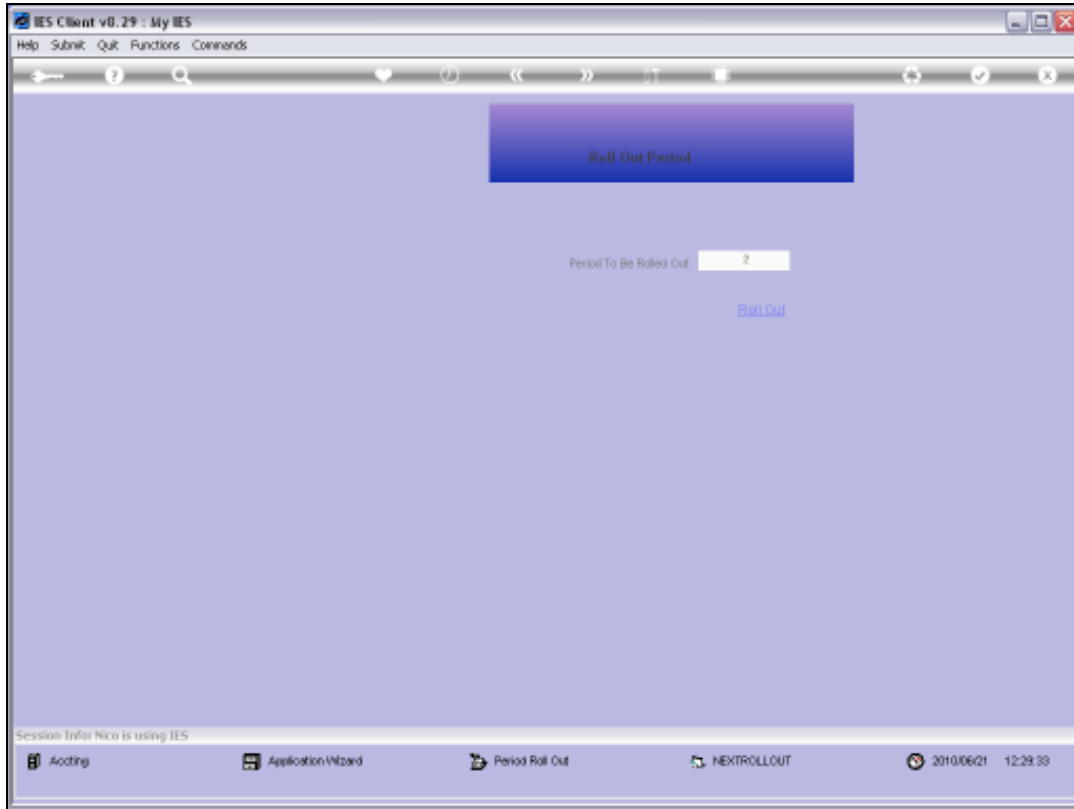
#### Slide 4

Slide notes: The explanation offered is that we should only do this if the Period is sufficiently old enough that we no longer need to see the Transaction detail for this Period on-line. In other words, when we archive the oldest Period, the detail of the Transactions are removed from the system, permanently.

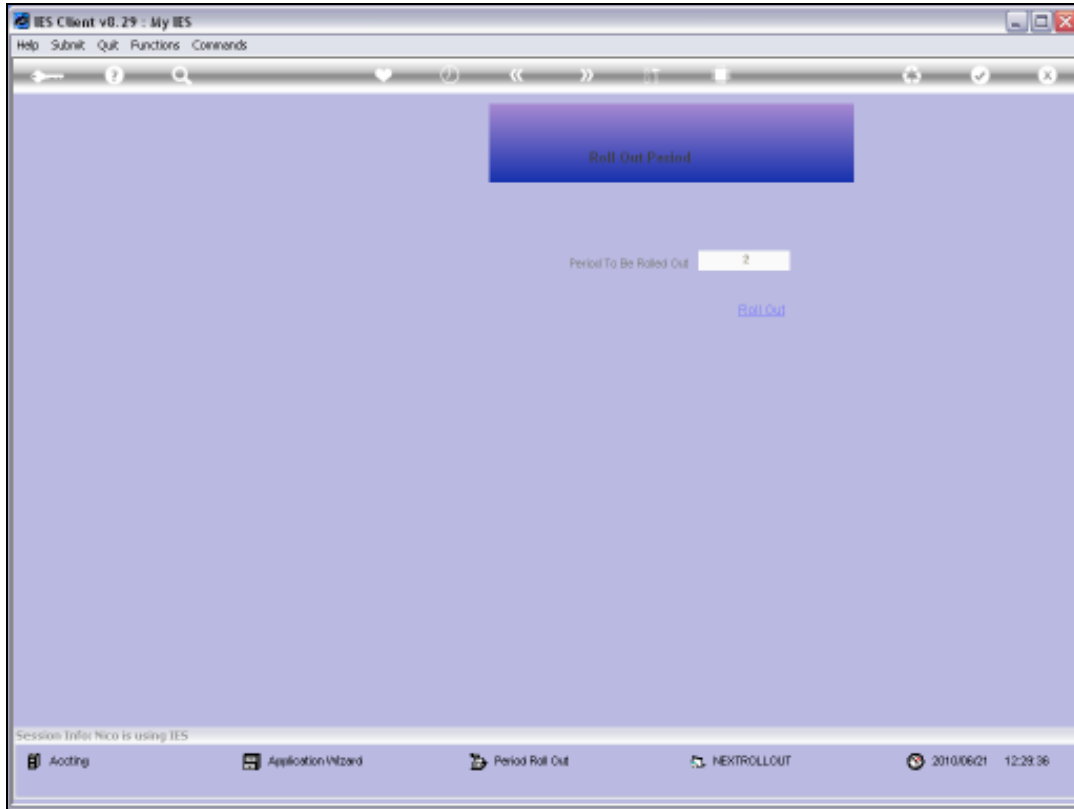


## Slide 5

Slide notes: Automatically the system will indicate the oldest Period as the next Period that can be ARCHIVED. We cannot archive Periods out of sequence.

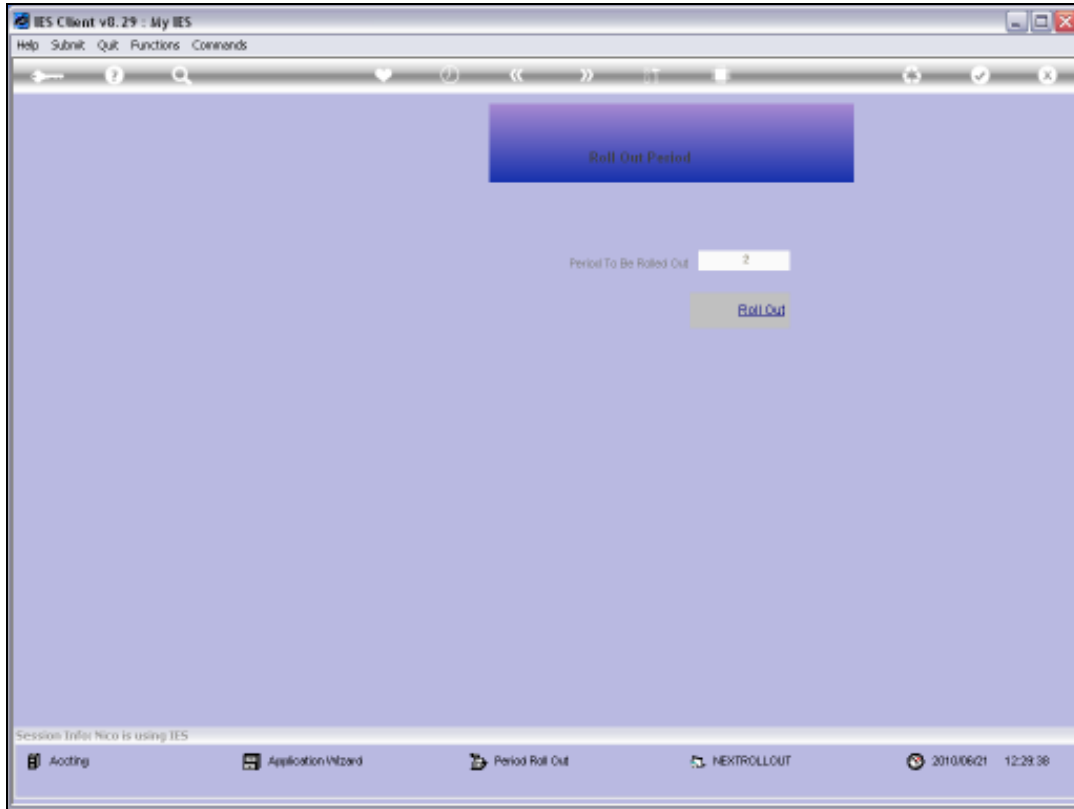


Slide 6  
Slide notes:



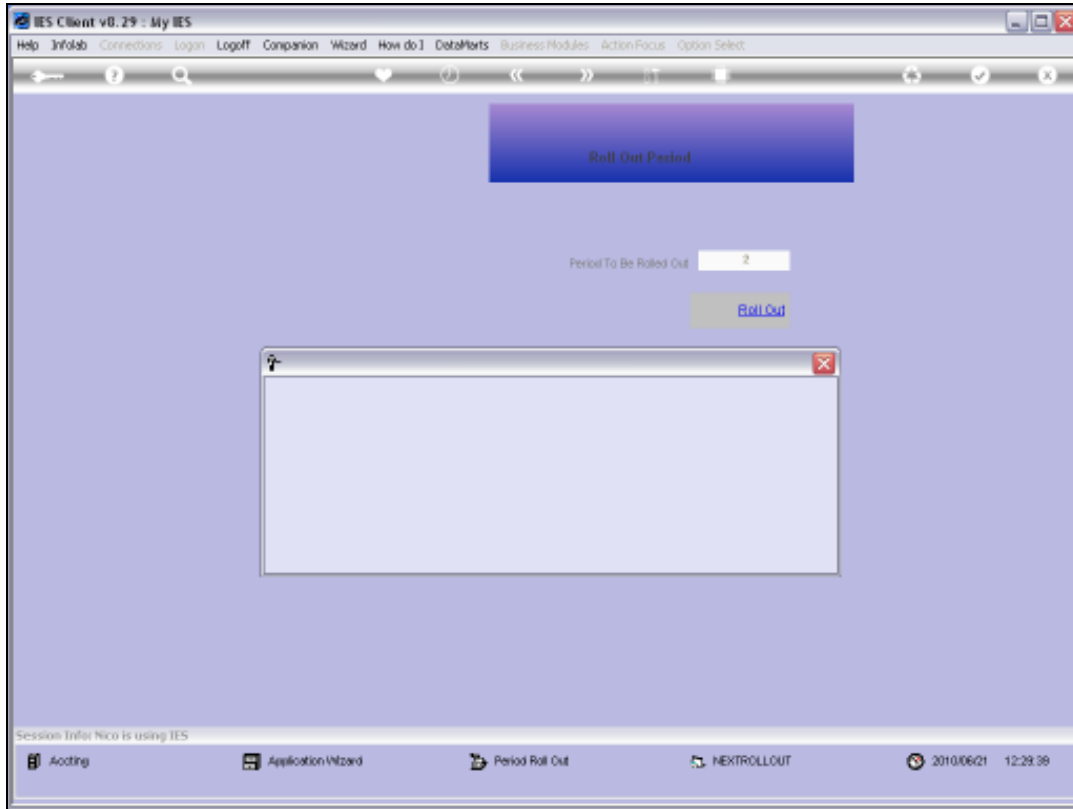
Slide 7

Slide notes: At this stage, we can still quit by exiting the screen, but if we choose 'Roll Out', then the archive procedure is initiated. It is best done after hours when Users are not actively working on the system.



Slide 8  
Slide notes:





Slide 9

Slide notes: The progress will be indicated, and in a large system with many Transactions, the process can take a while.

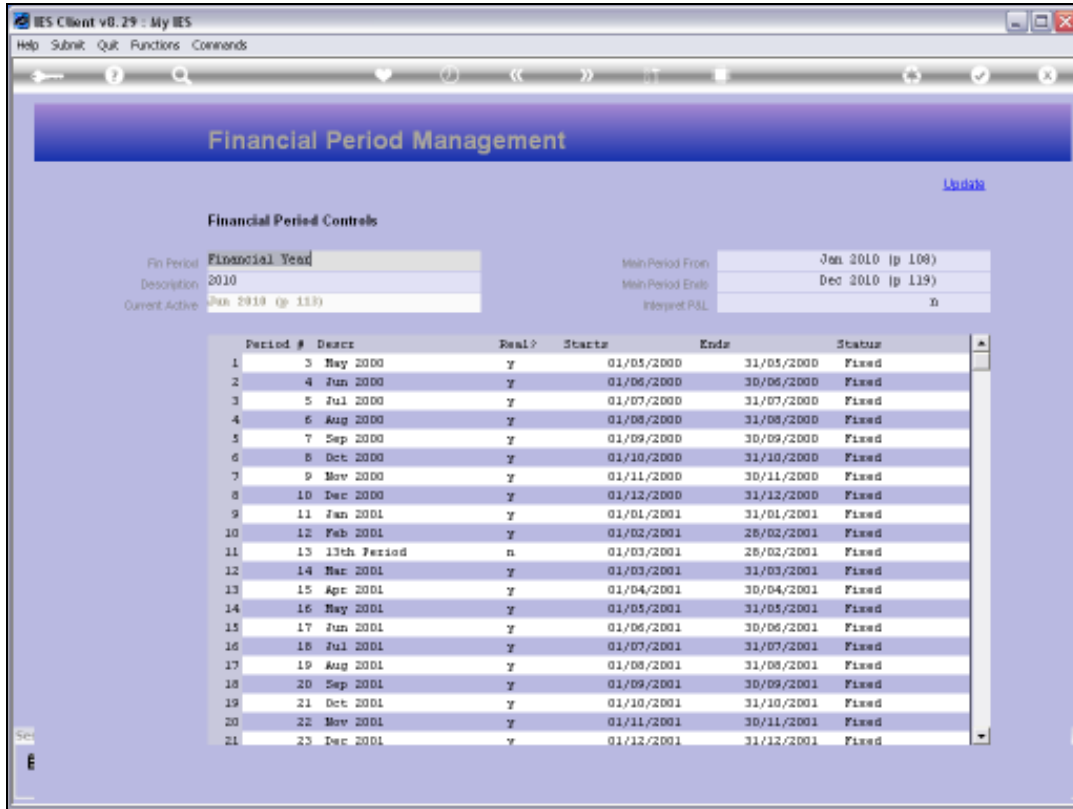


Slide 10

Slide notes: Once the roll out process is complete, we are returned to the Period wizard choices.



Slide 11  
Slide notes:



Slide 12

Slide notes: On the Main Period record we will be able to see that Period number 2 is no longer part of the system.

**Financial Period Management**

[Links](#)

**Financial Period Controls**

Fin Period: **Financial Year**  
Description: 2010  
Current Active: Jan 2010 (p 119)

Main Period From: Jan 2010 (p 108)  
Main Period Ends: Dec 2010 (p 119)  
Interpret PSL: n

Period #	Descr	Real?	Starts	Ends	Status
1	3 May 2000	y	01/05/2000	31/05/2000	Fixed
2	4 Jun 2000	y	01/06/2000	30/06/2000	Fixed
3	5 Jul 2000	y	01/07/2000	31/07/2000	Fixed
4	6 Aug 2000	y	01/08/2000	31/08/2000	Fixed
5	7 Sep 2000	y	01/09/2000	30/09/2000	Fixed
6	8 Oct 2000	y	01/10/2000	31/10/2000	Fixed
7	9 Nov 2000	y	01/11/2000	30/11/2000	Fixed
8	10 Dec 2000	y	01/12/2000	31/12/2000	Fixed
9	11 Jan 2001	y	01/01/2001	31/01/2001	Fixed
10	12 Feb 2001	y	01/02/2001	28/02/2001	Fixed
11	13 13th Period	n	01/03/2001	28/02/2001	Fixed
12	14 Mar 2001	y	01/03/2001	31/03/2001	Fixed
13	15 Apr 2001	y	01/04/2001	30/04/2001	Fixed
14	16 May 2001	y	01/05/2001	31/05/2001	Fixed
15	17 Jun 2001	y	01/06/2001	30/06/2001	Fixed
16	18 Jul 2001	y	01/07/2001	31/07/2001	Fixed
17	19 Aug 2001	y	01/08/2001	31/08/2001	Fixed
18	20 Sep 2001	y	01/09/2001	30/09/2001	Fixed
19	21 Oct 2001	y	01/10/2001	31/10/2001	Fixed
20	22 Nov 2001	y	01/11/2001	30/11/2001	Fixed
21	23 Dec 2001	y	01/12/2001	31/12/2001	Fixed

Slide 13  
Slide notes:

Financial Period Management

Financial Period Controls

Fin Period: 2010  
Description: 2010  
Current Active: Jan 2010 (p 119)

Main Period From: Jan 2010 (p 108)  
Main Period Ends: Dec 2010 (p 119)  
Interpret PSL: n

Period #	Descr	Real?	Starts	Ends	Status
1	3 May 2000	y	01/05/2000	31/05/2000	Fixed
2	4 Jun 2000	y	01/06/2000	30/06/2000	Fixed
3	5 Jul 2000	y	01/07/2000	31/07/2000	Fixed
4	6 Aug 2000	y	01/08/2000	31/08/2000	Fixed
5	7 Sep 2000	y	01/09/2000	30/09/2000	Fixed
6	8 Oct 2000	y	01/10/2000	31/10/2000	Fixed
7	9 Nov 2000	y	01/11/2000	30/11/2000	Fixed
8	10 Dec 2000	y	01/12/2000	31/12/2000	Fixed
9	11 Jan 2001	y	01/01/2001	31/01/2001	Fixed
10	12 Feb 2001	y	01/02/2001	28/02/2001	Fixed
11	13 13th Period	n	01/03/2001	28/02/2001	Fixed
12	14 Mar 2001	y	01/03/2001	31/03/2001	Fixed
13	15 Apr 2001	y	01/04/2001	30/04/2001	Fixed
14	16 May 2001	y	01/05/2001	31/05/2001	Fixed
15	17 Jun 2001	y	01/06/2001	30/06/2001	Fixed
16	18 Jul 2001	y	01/07/2001	31/07/2001	Fixed
17	19 Aug 2001	y	01/08/2001	31/08/2001	Fixed
18	20 Sep 2001	y	01/09/2001	30/09/2001	Fixed
19	21 Oct 2001	y	01/10/2001	31/10/2001	Fixed
20	22 Nov 2001	y	01/11/2001	30/11/2001	Fixed
21	23 Dec 2001	y	01/12/2001	31/12/2001	Fixed

Slide 14  
Slide notes: