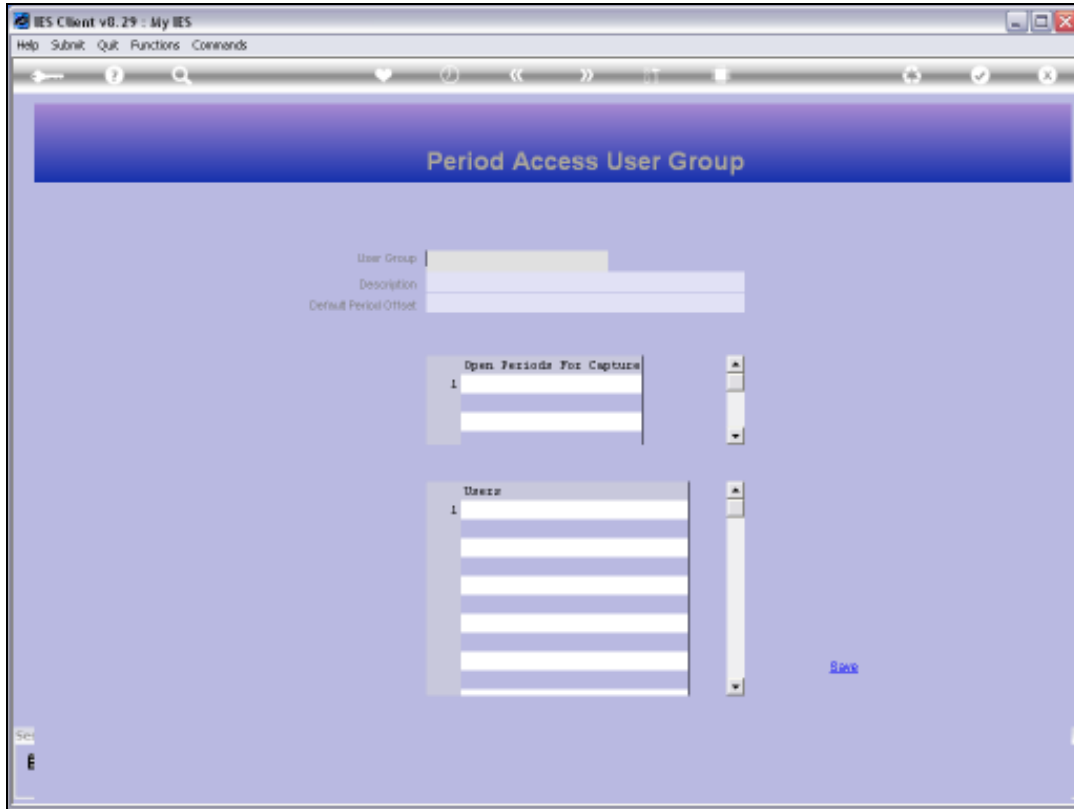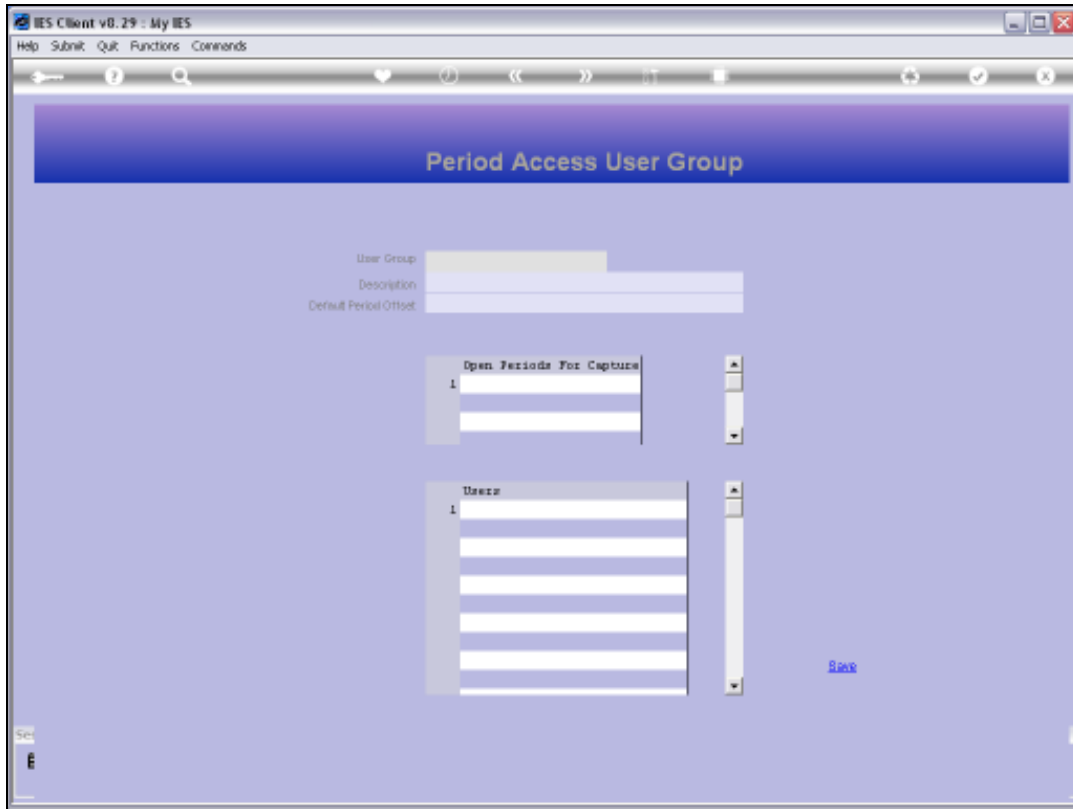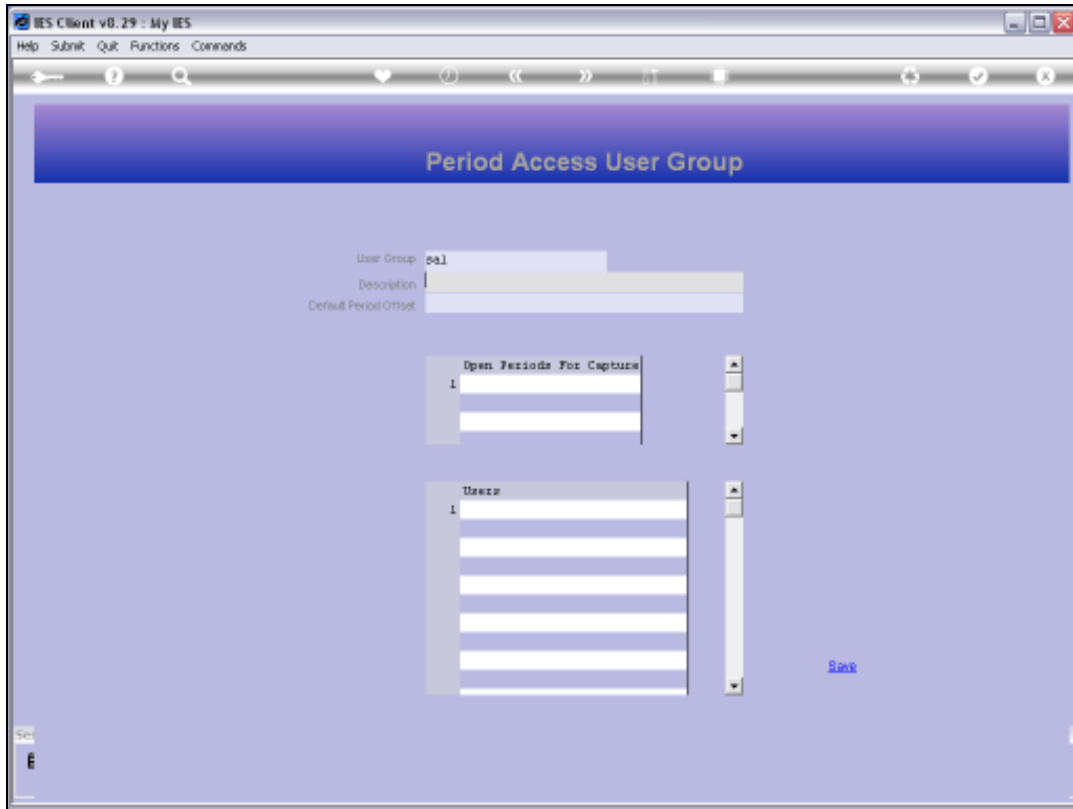Slide 1

Slide notes: In this tutorial we will look at the Period Access User Groups. These Groups are optional to use, but in a nutshell, we will use them if we regularly have multiple Periods open and we also wish to control to the effect that only certain Users may post to any of those multiple Open Periods.
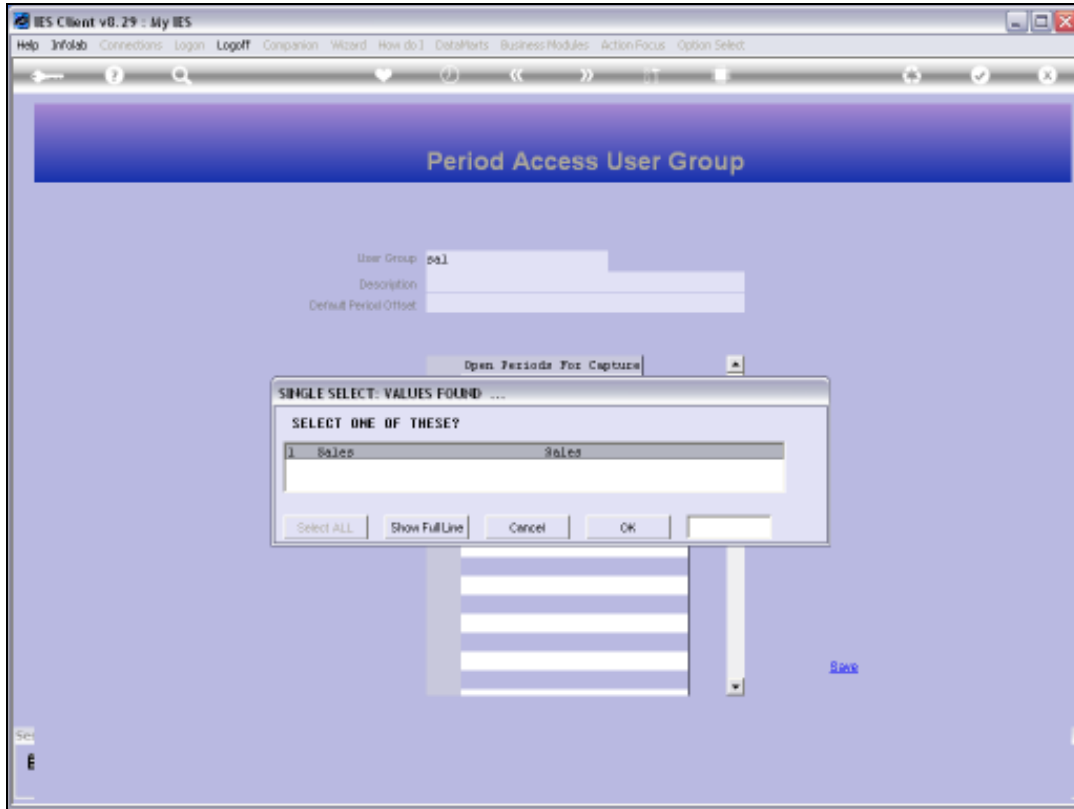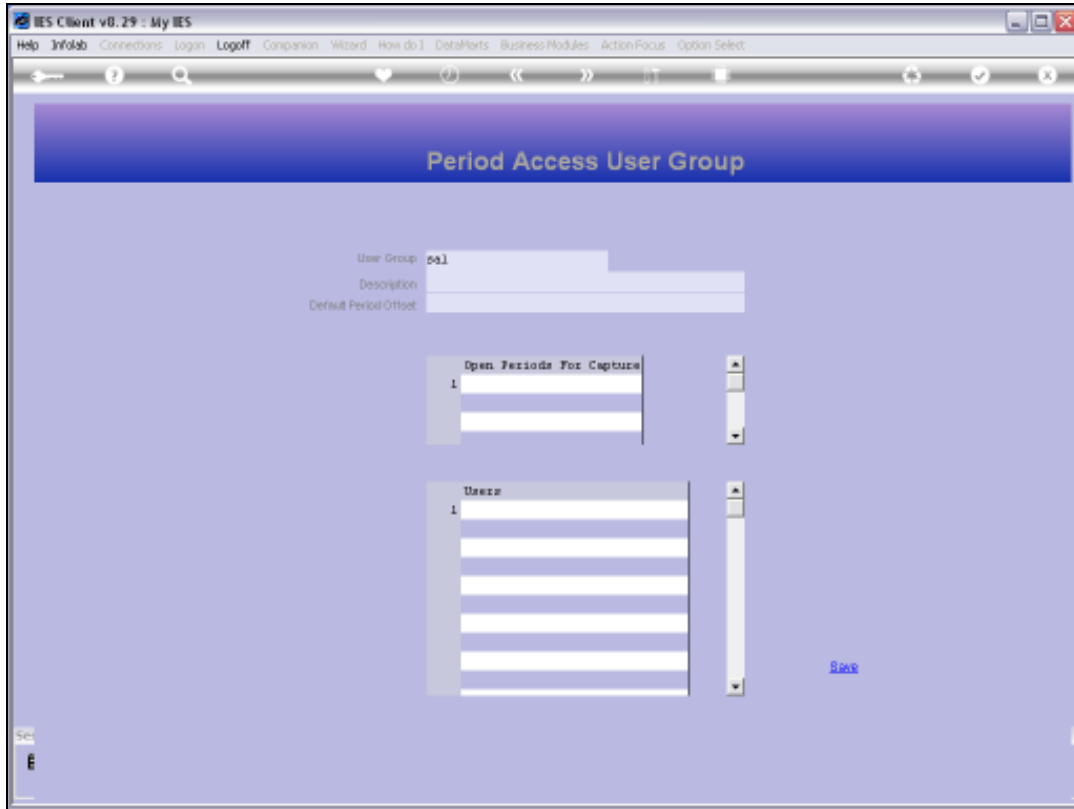
Slide 2
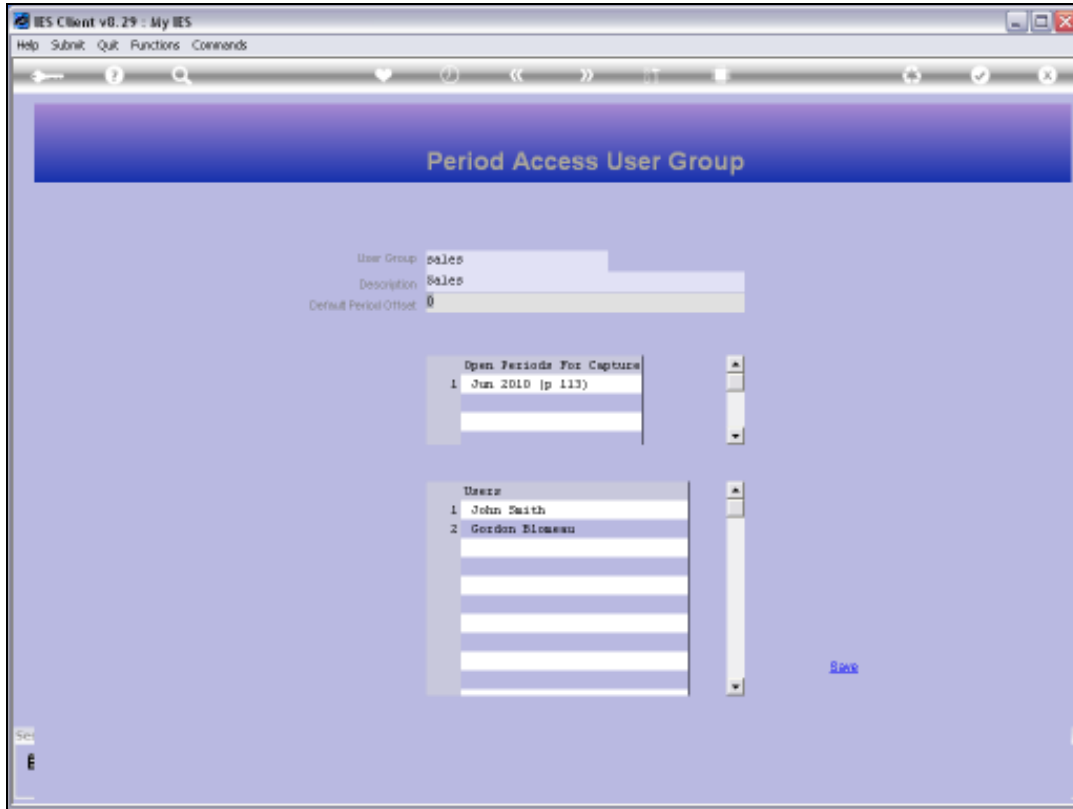Slide notes:

Slide 3
Slide notes:
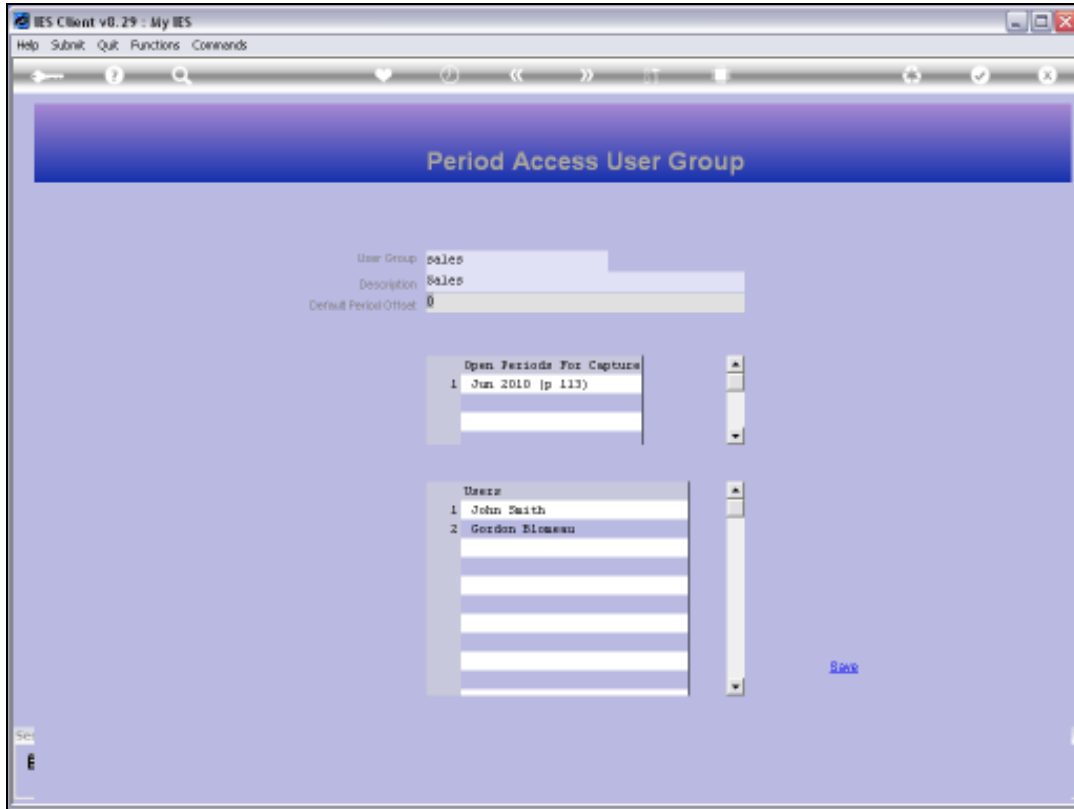
Slide 4

Slide notes:

Slide 5
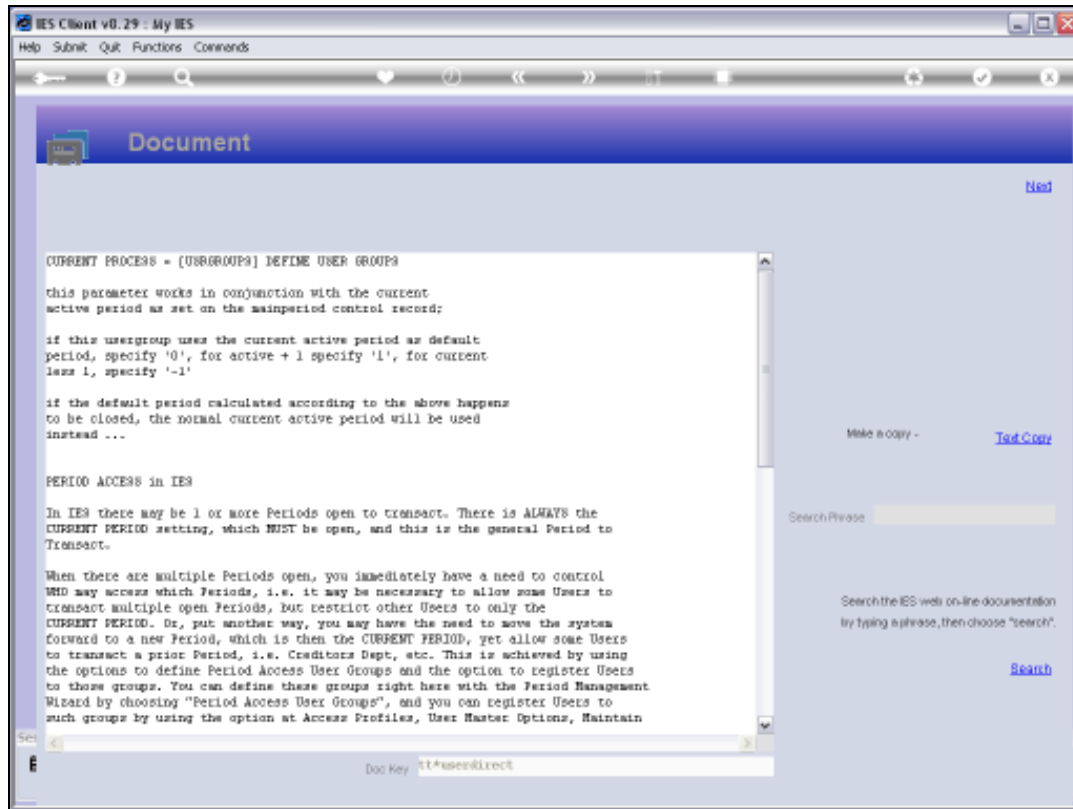
Slide notes:

Slide 6
Slide notes:

Slide 7

Slide notes: A Period Access Group has a short Key and it has a Description. Then, it has a Default Period Offset. If this is zero, then it means that any Users in this Group will by default post to the Current Active Period.
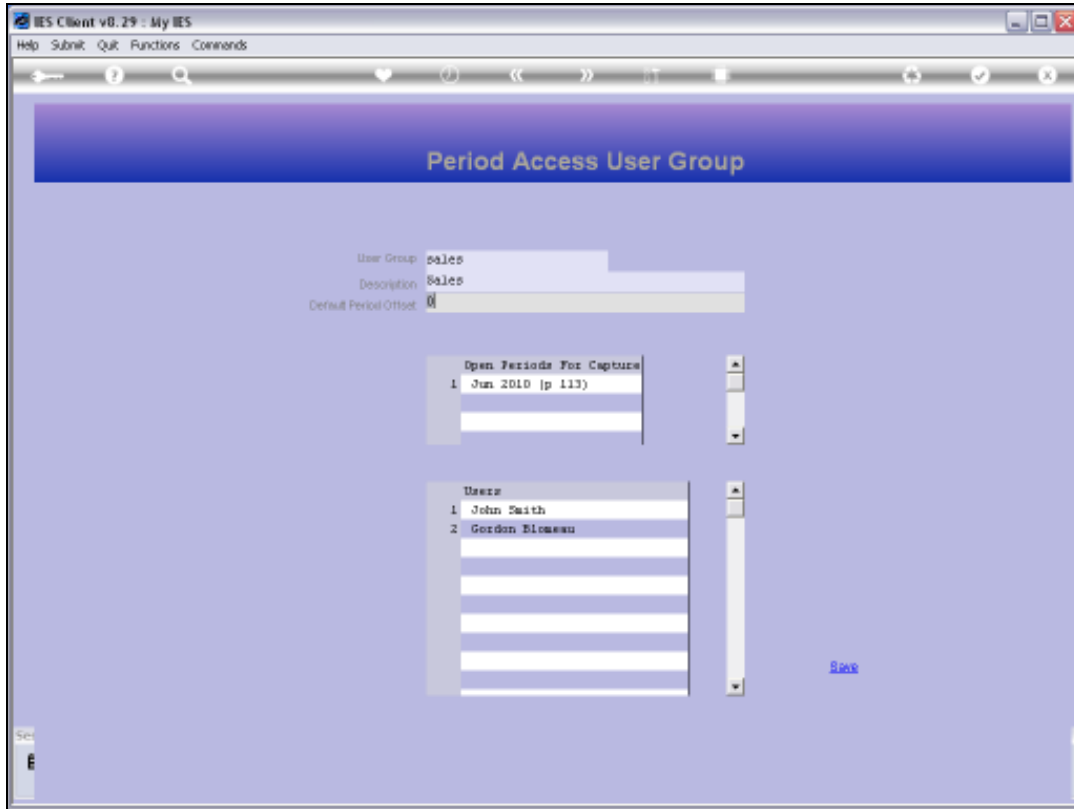
Slide 8
Slide notes:

Slide 9

Slide notes: The Help explains more, and we can make the offset negative to let Users in the Group post to a prior Period by Default, or make it positive to have the Users post to a future Period.

Slide 10
Slide notes:

Slide 11

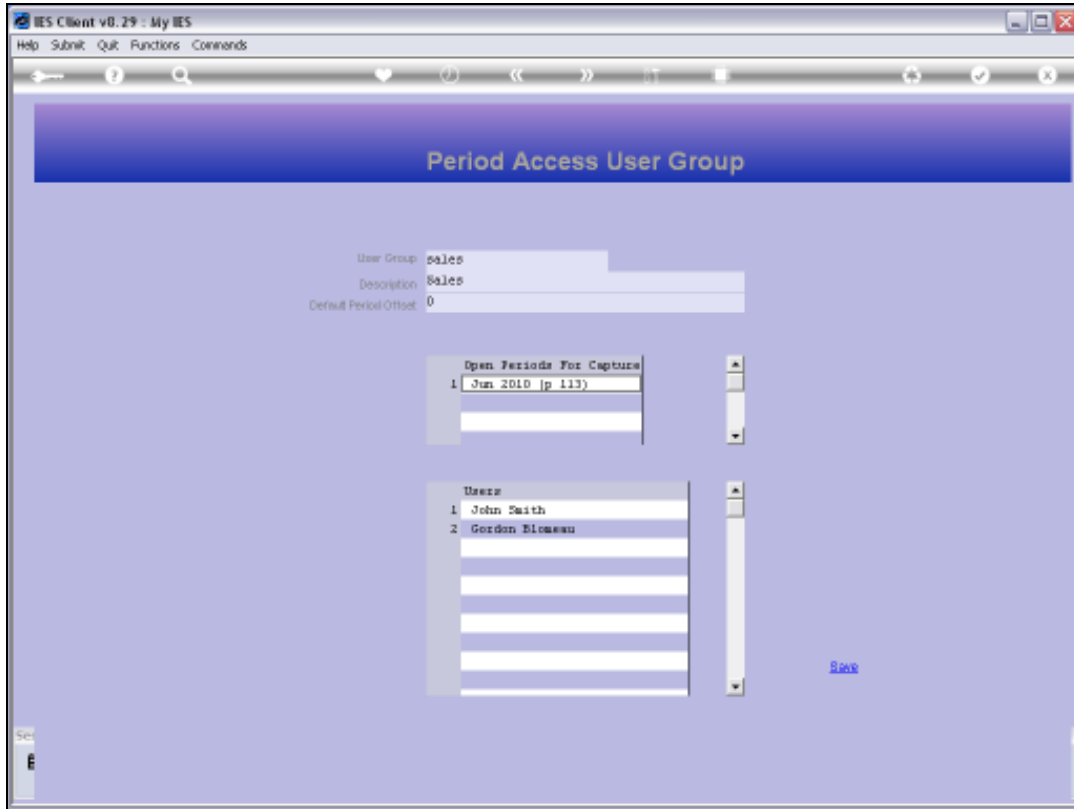Slide notes: The Current Active Period is always open to all Users, whether in a Group or not. In addition, we may specify on the Group record any other Open Periods that this Group may post to, or we may list no other Periods if they may only use the Active Period.
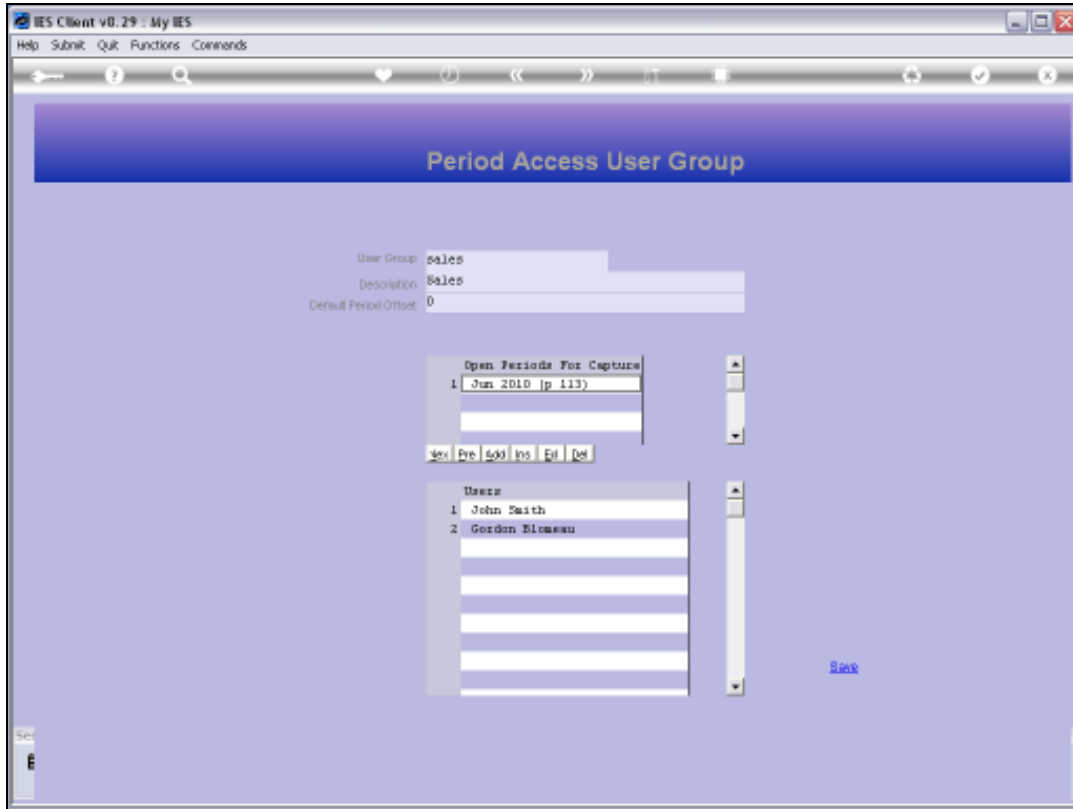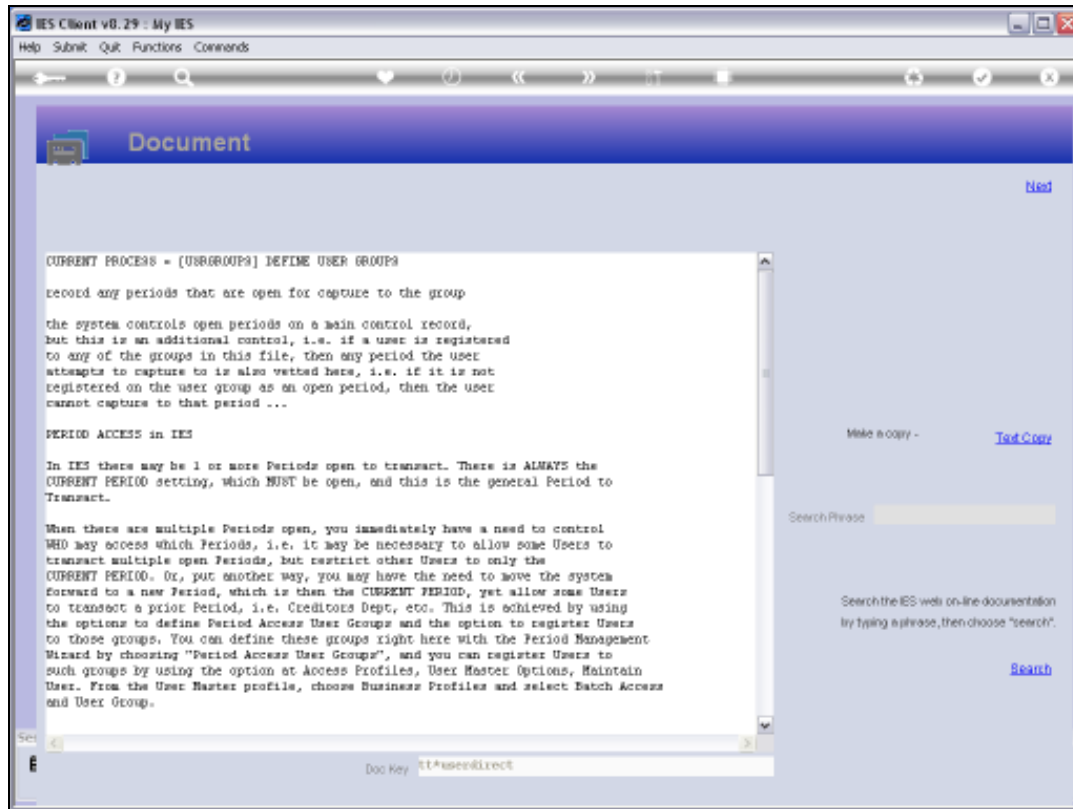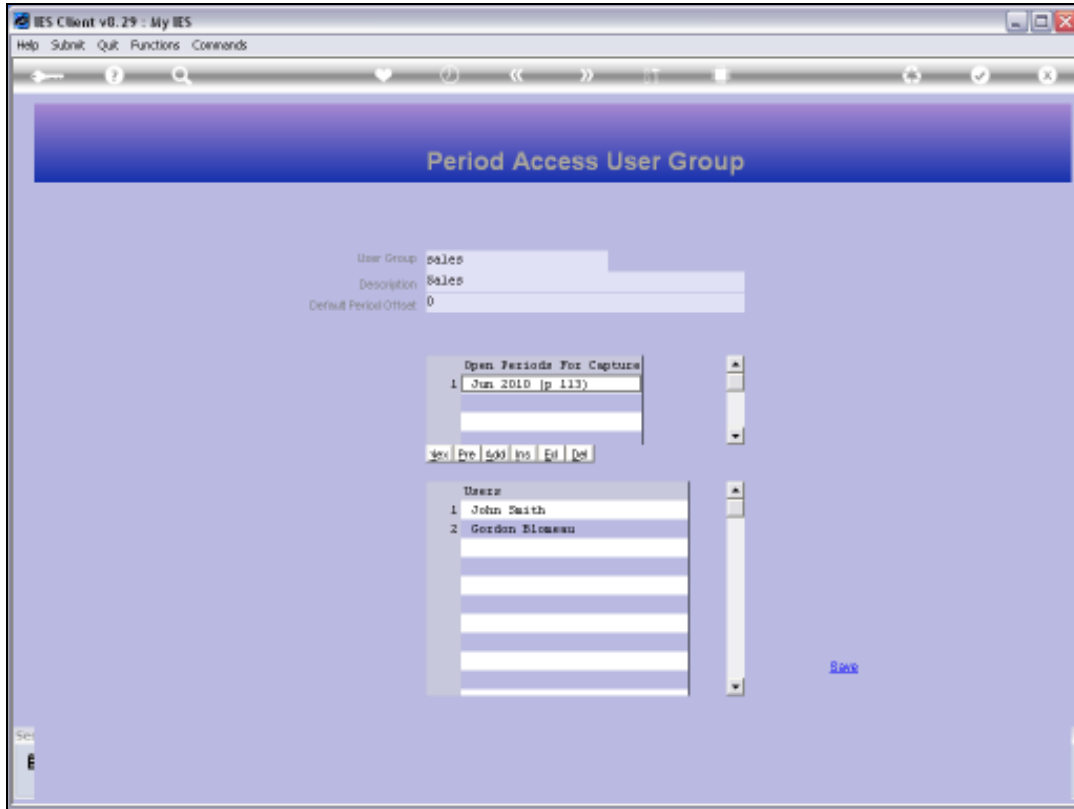
Slide 12
Slide notes:
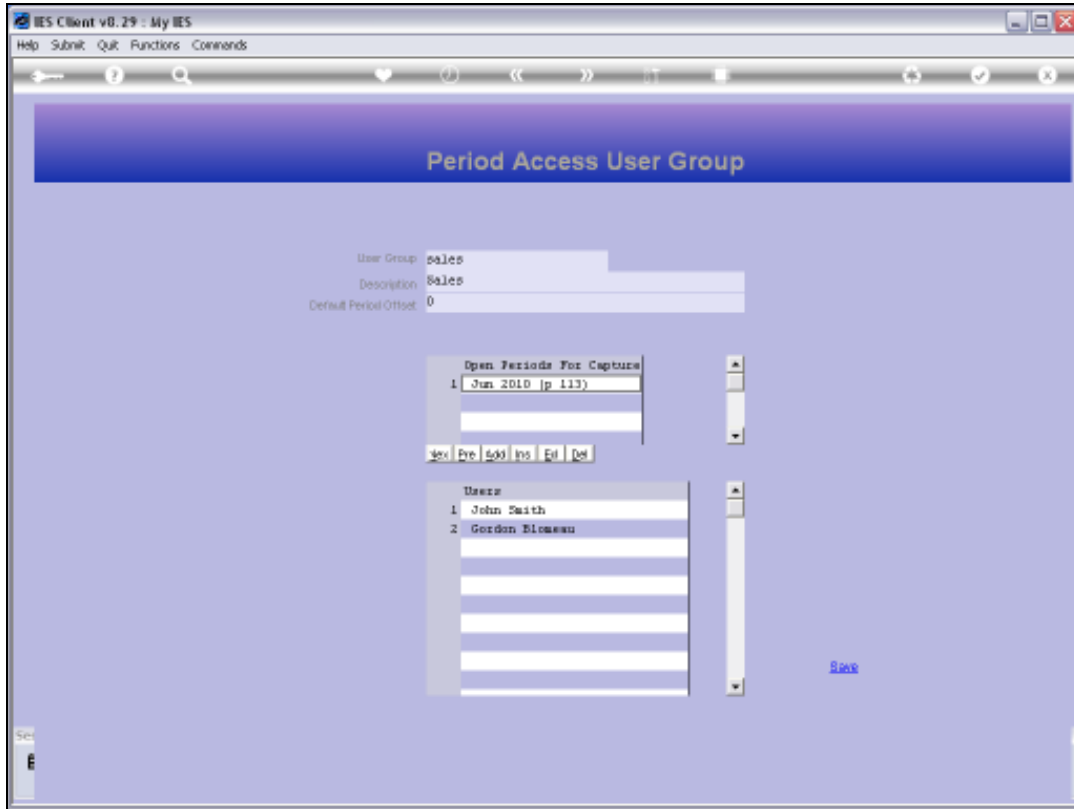
Slide 13

Slide notes:

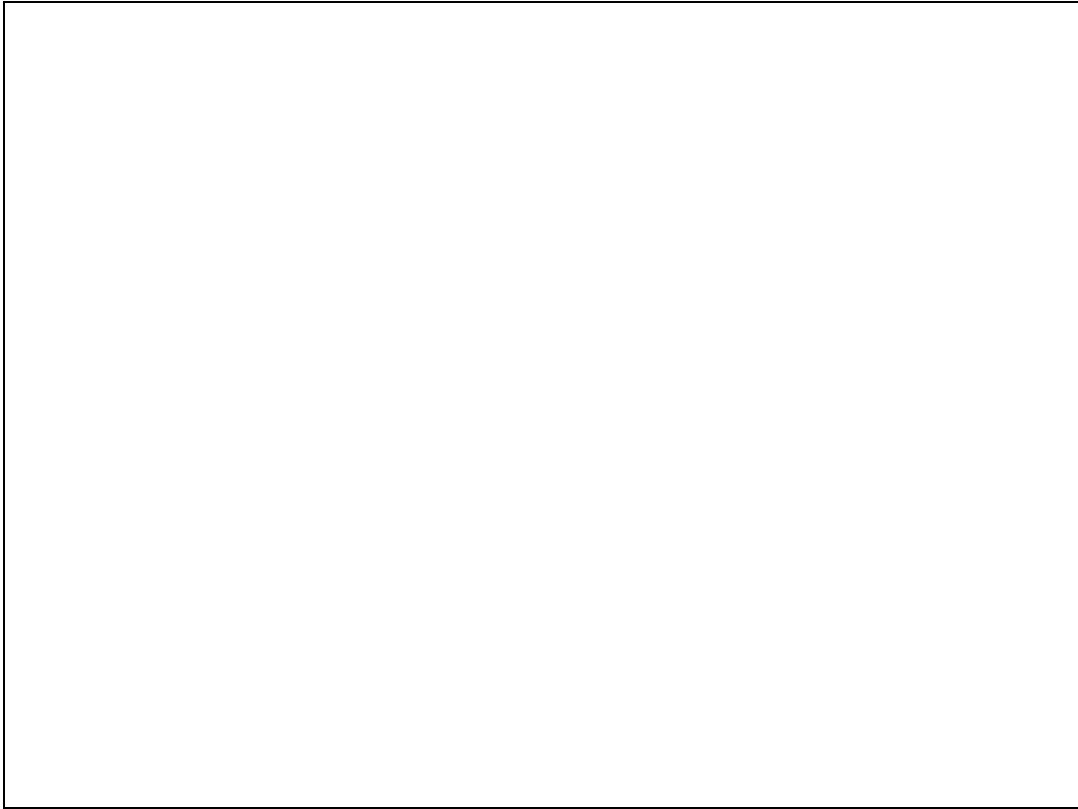Slide 14

Slide notes: Here is an explanation on the Help.

Slide 15

Slide notes:

Slide 16
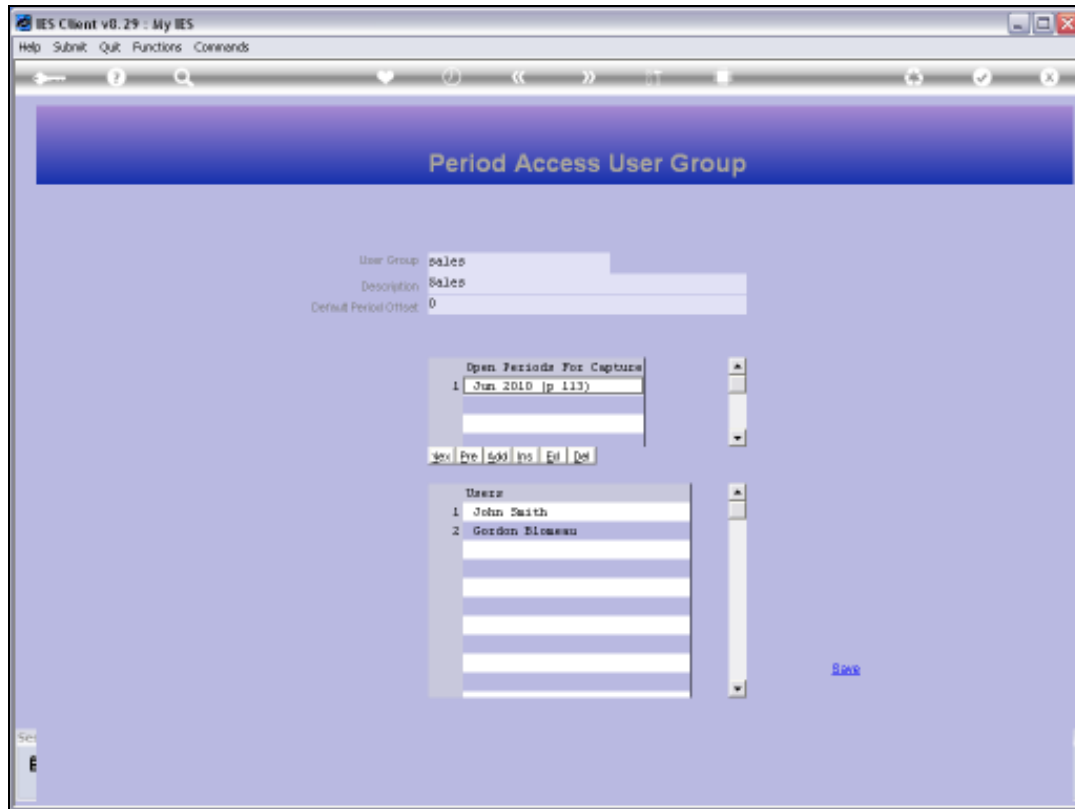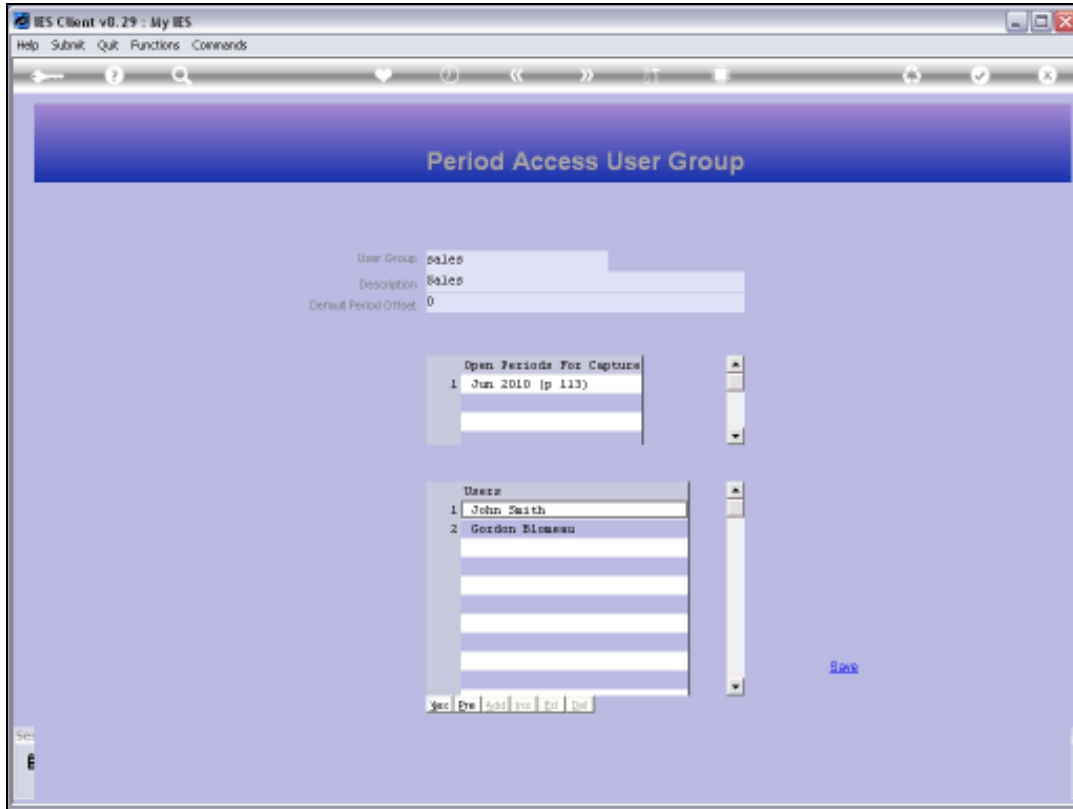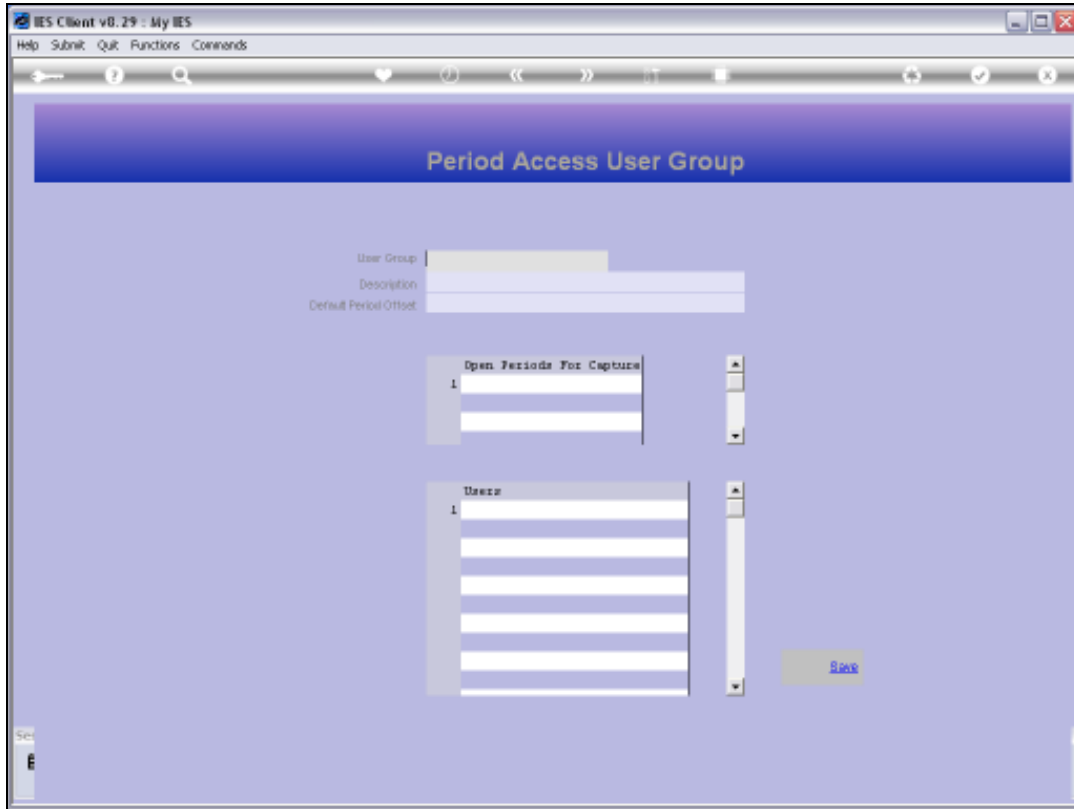Slide notes:

Slide 17
Slide notes:

Slide 18

Slide notes: We can create as many Groups as we may need, and any User may be registered to 1 Group or to no Group at all. If a User is not registered to such a Group, then the User has access to any Open Periods for posting, and if registered to a Group, then the User is limited to the Open Periods as listed for the Group.
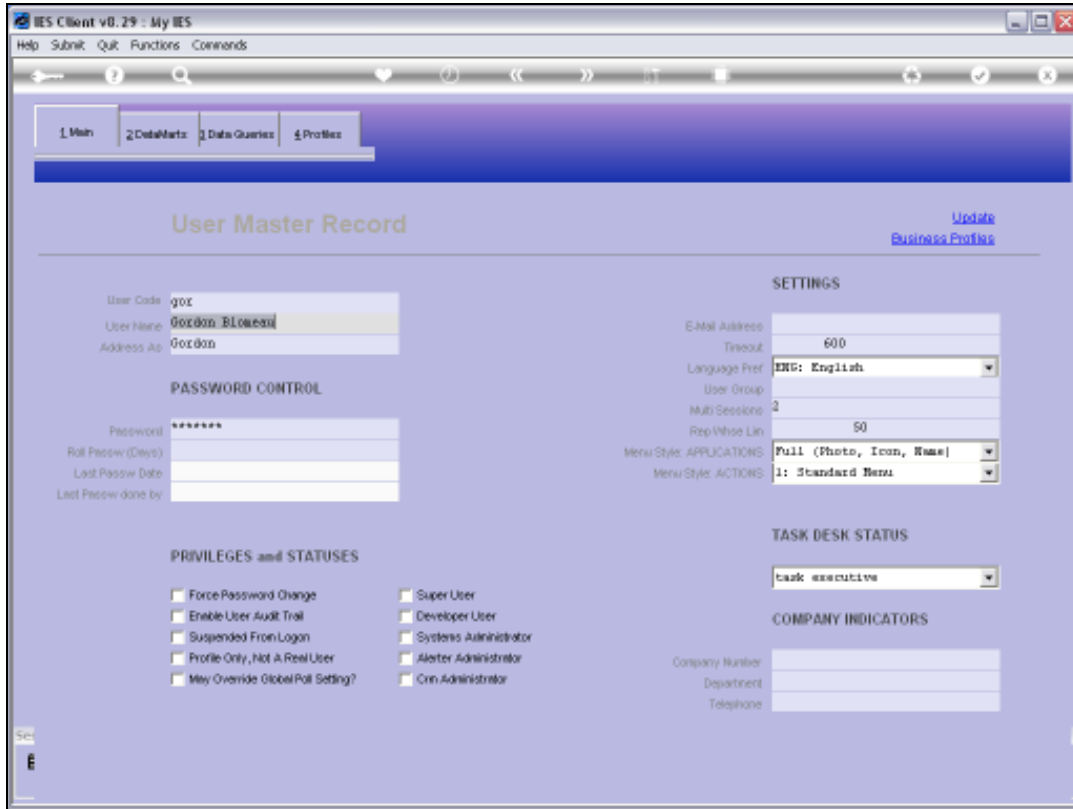
Slide 19

Slide notes: We can only define the Group parameters here, not the Users who belong to the Group, although they are shown.
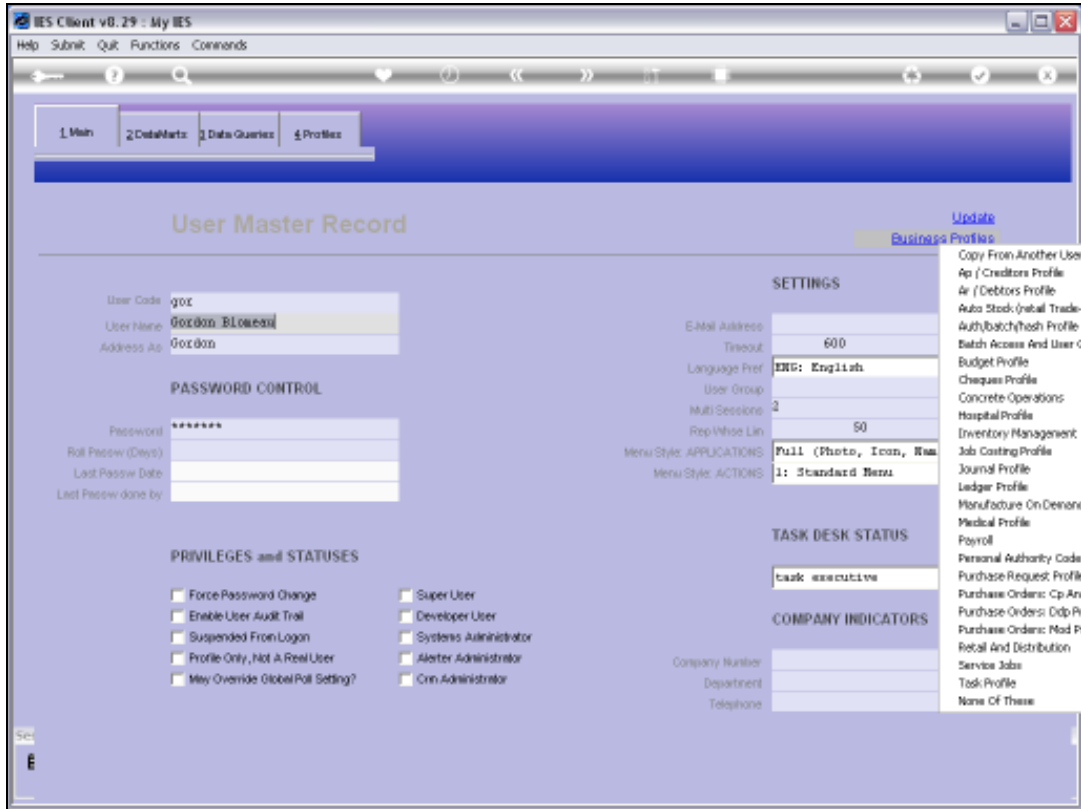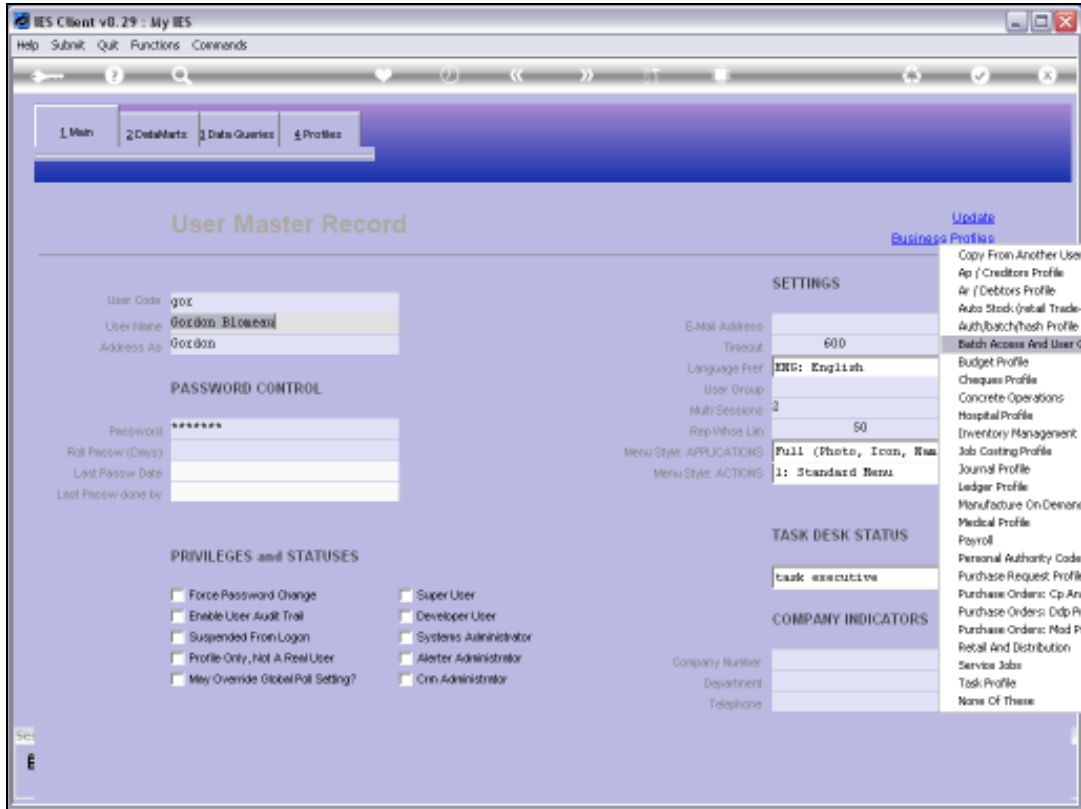
Slide 20
Slide notes:

Slide 21

Slide notes: How we register a User to a Period Access Group is discussed in the User Access tutorials, but we will show briefly here what it is about.
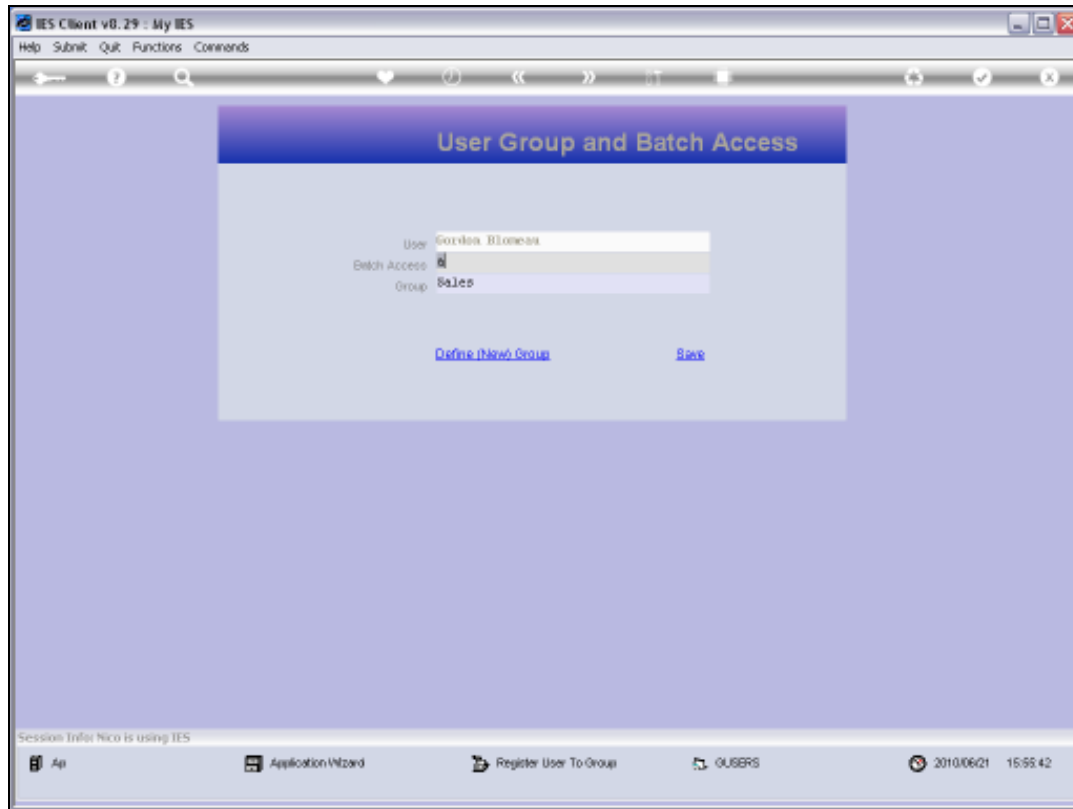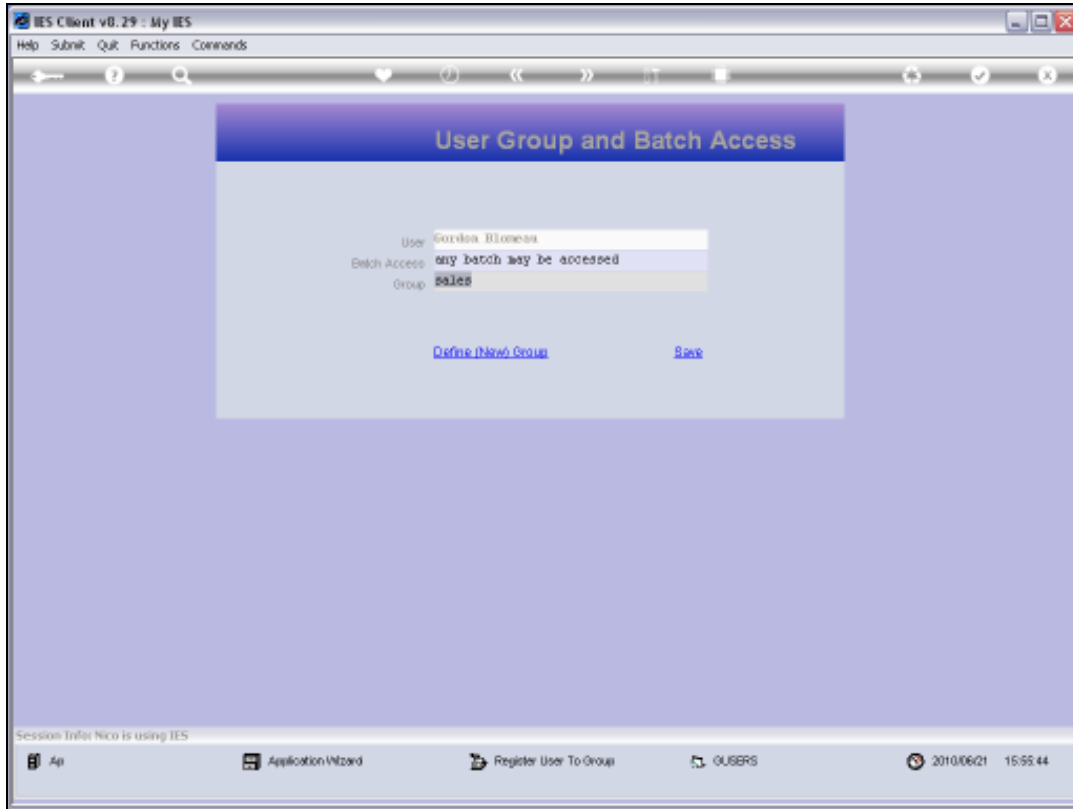
Slide 22

Slide notes:

Slide 23

Slide notes: From the User Master record, we choose 'Business Profiles' and then we choose 'Batch Access and User Group'.

Slide 24

Slide notes: And here we can lookup from the Groups and include the User in such a Group. To remove a User from a Group, we just select a different Group or delete the selected Group on the field and then SAVE the record again.

Slide 25
Slide notes: