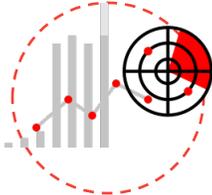


Closing



Financial Period.

The Task



Walk through the process of Closing / Reopen Financial Period (e.g. Status Change between the 4-steps chain: Inactive, Open, Closed, Locked).

We need to find the way by which we could greatly improve UX of the task completion.

Our Research is based on partial knowledge of the common Use-Cases or Role-Scenarios and on the solution proposed by MYOB earlier.

Chaotic Phase of Info Gathering & Research.

Research process in which I tried to analyze common User Problems, User Roles, Cases and Scenarios while searching for Insights on how we could decrease errors of the Task Completion processes and how can we add Intuitive Performance to the tasks.

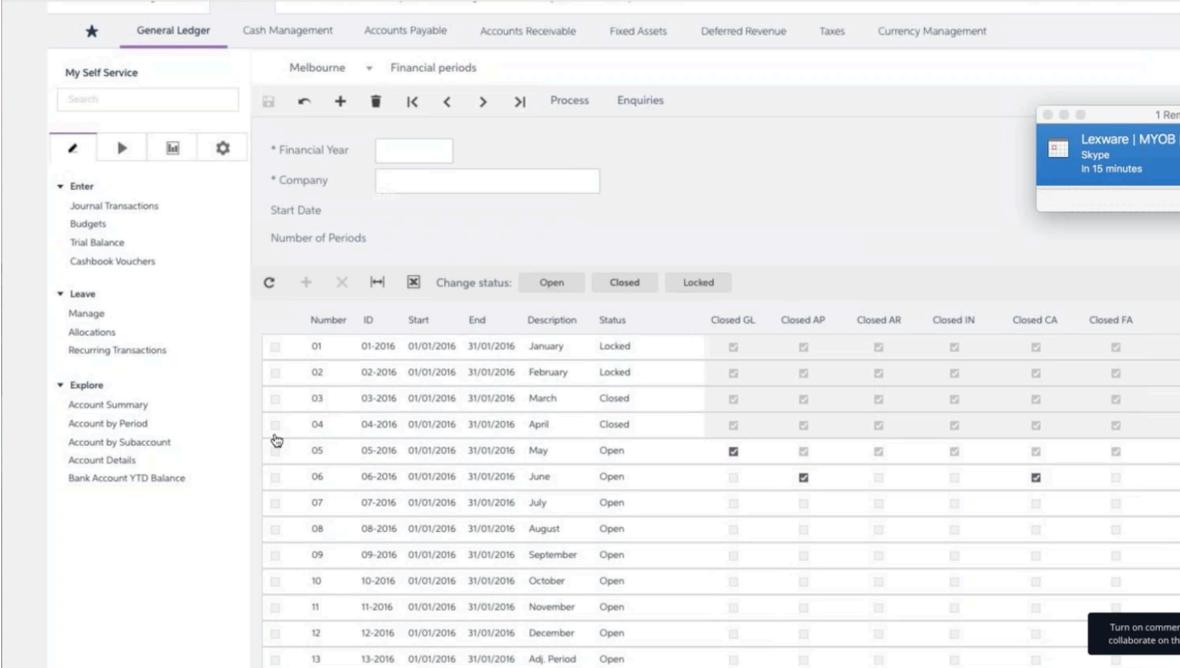
It's a bit messy, chaotic and unstructured - it's merely bits and pieces but it will help us to clearly see all the problems we have.

MYOB solution cons.

GL-selector (whole row-selector) is too separated from the sub-ledgers checkboxes. It clutters user attention making it hard to perform and complete the common tasks. The same goes to action buttons (Open, Closed, Locked) – they're separated from the table fields and selectors. It makes the whole experience Inconsistent, hard to perform and analyze. So, MYOB did some UI improvement, but didn't dig into UX much.

So, I thought I should propose slightly different approach – we could use infield controls for status change based on case scenarios, deep psychology and knowledge of the positive force of the simplifications in UI - so to say 😊

I analyzed MYOB initiative ([VIDEO-link](#)) in order to find the ways to Improve and simplify UX. I made Research based on User Roles and Use Case Scenarios trying to make the whole process perfectly fit into 4-steps status change chain logic proposed in [AC-47341](#) ([AC-36710](#)) – and to make it clear, intuitive and easy-to-perform. In the process I found some troubles and “thin” spots in my initial solution so I'll try to provide detailed overview of the whole process.



The screenshot displays the MYOB General Ledger interface. The top navigation bar includes 'General Ledger', 'Cash Management', 'Accounts Payable', 'Accounts Receivable', 'Fixed Assets', 'Deferred Revenue', 'Taxes', and 'Currency Management'. The main content area shows a table of financial periods for the Melbourne entity. The table has columns for Number, ID, Start, End, Description, Status, and several 'Closed' checkboxes (GL, AP, AR, IN, CA, FA). The status of each period is indicated by a dropdown menu with options: Open, Closed, and Locked. The table shows periods from January to December 2016, with January and February locked, March closed, and April through December open. A 'Change status' button is visible above the table. On the left, there is a 'My Self Service' sidebar with options like 'Enter', 'Leave', and 'Explore'. A 'Lexware | MYOB | Skype In 15 minutes' notification is visible in the top right corner.

Number	ID	Start	End	Description	Status	Closed GL	Closed AP	Closed AR	Closed IN	Closed CA	Closed FA
01	01-2016	01/01/2016	31/01/2016	January	Locked	<input checked="" type="checkbox"/>					
02	02-2016	01/01/2016	31/01/2016	February	Locked	<input checked="" type="checkbox"/>					
03	03-2016	01/01/2016	31/01/2016	March	Closed	<input checked="" type="checkbox"/>					
04	04-2016	01/01/2016	31/01/2016	April	Closed	<input checked="" type="checkbox"/>					
05	05-2016	01/01/2016	31/01/2016	May	Open	<input checked="" type="checkbox"/>					
06	06-2016	01/01/2016	31/01/2016	June	Open	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
07	07-2016	01/01/2016	31/01/2016	July	Open	<input type="checkbox"/>					
08	08-2016	01/01/2016	31/01/2016	August	Open	<input type="checkbox"/>					
09	09-2016	01/01/2016	31/01/2016	September	Open	<input type="checkbox"/>					
10	10-2016	01/01/2016	31/01/2016	October	Open	<input type="checkbox"/>					
11	11-2016	01/01/2016	31/01/2016	November	Open	<input type="checkbox"/>					
12	12-2016	01/01/2016	31/01/2016	December	Open	<input type="checkbox"/>					
13	13-2016	01/01/2016	31/01/2016	Adj. Period	Open	<input type="checkbox"/>					

Considering Process

Based on prior analyze I ended up with these assumptions

1. We should accentuate misc. statuses with **barely visible background** colors. In order to bring momentary sense for users – they see the groups of the same statuses marked by visible-recognized elements.
2. Close GL checkbox.
It should be added to each periods row (it could appear on hover state – only when you point mouse over the correspondent row – in order to give Supervisor understanding that this checkbox applies to the whole row. It should be applied to the header in order to multi-select periods. **GL-checkbox should be interconnected with 'status selector' control** (you don't need to check box when change GL-status as Supervisor).
3. All Closed, Locked periods and Unended, Unfinished (future) periods should be disabled for multi-select – you can't simply multi-select "future" periods and locked/closed periods. It brings sense to the multi-selection task by adding possibility to quickly perform **multi-select & status change for the same 'status fields' only**.
4. Close GL, Close *sub-ledgers* - should be renamed to GL & AP, AR, IN, CA, FA – because we can not only 'Close' periods in new 4-steps logic but also 'Open' an 'Inactive' ones. So, unified Header needed.

Description	Close GL
	<input checked="" type="checkbox"/>
January	<input checked="" type="checkbox"/>
February	<input checked="" type="checkbox"/>
March	<input checked="" type="checkbox"/>
April	<input checked="" type="checkbox"/>
May	<input checked="" type="checkbox"/>
June	<input type="checkbox"/>
July	<input type="checkbox"/>

Initial Ideas

Separate GL from subledgers

In order to simplify the process of closing GL-periods – we should improve visibility by separating General Ledger column from sub-ledgers columns. But in the same time we should keep it close to the Status field in order to keep task-performance UX consistent.

Doing so will greatly improve the processes of the 'Closing GL' and 'Closing GL while others is opened'.

	Financial Period ID	Start Date	End Date	Description	Close GL
					<input checked="" type="checkbox"/>
	01-2018	1/1/2018	1/31/2018	January	<input checked="" type="checkbox"/>
	02-2018	2/1/2018	2/28/2018	February	<input checked="" type="checkbox"/>
	03-2018	3/1/2018	3/31/2018	March	<input checked="" type="checkbox"/>
	04-2018	4/1/2018	4/30/2018	April	<input checked="" type="checkbox"/>
	05-2018	5/1/2018	5/31/2018	May	<input checked="" type="checkbox"/>
	06-2018	6/1/2018	6/30/2018	June	<input type="checkbox"/>
	07-2018	7/1/2018	7/31/2018	July	<input type="checkbox"/>
	08-2018	8/1/2018	8/31/2018	August	<input type="checkbox"/>
	09-2018	9/1/2018	9/30/2018	September	<input type="checkbox"/>
	10-2018	10/1/2018	10/31/2018	October	<input type="checkbox"/>

Close GL	Status	Close AP	Close AR	Close IN
<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Period Group-Selector

Period Group-Selector is the main field 'checkbox' control which basically is used by Supervisors in order to close whole period (whole row). You could select row(s) and then apply 'status change' scenarios.

Status Change multiple-select Scenarios for periods is also available but this solution a little complex to apply. All the possible use cases should be discussed in order to deliver the best solution possible.

Description		Close GL		
		<input checked="" type="checkbox"/>		
	January	<input checked="" type="checkbox"/>		
	February	<input checked="" type="checkbox"/>		
	March	<input checked="" type="checkbox"/>		
Close GL	April	<input checked="" type="checkbox"/>	Close AR	Close IN
<input checked="" type="checkbox"/>	May	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	June	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	July	<input type="checkbox"/>		

The common User Scenarios

1. Generate periods for the upcoming Year.
2. Open one of the periods → enter document or post transactions → to the period.
3. All transaction are posted → period is closed in subledgers → preventing errors from subledger departments agents. Closed periods could be adjusted in cases of data correction and audit.
4. Financial Supervisor → Period End Adjustment → Close period in GL.

Process: Period Data → Verified → Disclosed in Reports → Period has to be Locked = Keeps the data from Change

Multiple-Select.

Start of the Year = **All** 'Inactive' → change to 'Active' (Opened).

Audit Case = **All** Closed/Locked → Opened/Closed.

Multi-select for the same statuses - through the select of checkboxes → then Apply Changes.

Or Multi-Change by inline-control arrows - change same Statuses → then Apply Changes.

Suggestions on the improvements of **UX.**

UX Improvements. What should be made in order to make the Processes of Financial Periods Closing - intuitive, Easy to Perform and Smooth for any User Roles.

Inline Status-Selector control

The main benefit of this action-control is that it joined with the table row itself. So you see it's status and you able to simply change it right here right now.

Intuitive status-legend. 

Multi-select for periods supported by adding trigger-action button in the Statuses Header. It appears in disabled state as soon as Close GL checkbox clicked and selects the whole periods of the Financial Year. Then you change statuses - trigger-action button 'Apply Changes' becomes active so you can perform changes.

Close GL	Status
<input checked="" type="checkbox"/>	Apply Changes

Description	Close GL	Status ⓘ	Close AP	Close AR	Close IN	Close CA	Close FA
	<input checked="" type="checkbox"/>	OPEN CLOSE					
January	<input checked="" type="checkbox"/>	< Locked >	<input checked="" type="checkbox"/>				
February	<input checked="" type="checkbox"/>	< Closed >	<input checked="" type="checkbox"/>				
March	<input checked="" type="checkbox"/>	< Closed >	<input checked="" type="checkbox"/>				
April	<input checked="" type="checkbox"/>	< Open >	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
May	<input checked="" type="checkbox"/>	< Open >	<input type="checkbox"/>				
June	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
July	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
August	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
September	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
October	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
November	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
December	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>				

Status ⓘ

OPEN CLOSE

< Locked >

< Closed >

< Closed >

< Open >

In the process of constant research and sketching ideas I found out that I missed **trigger-action button** for each period selected.

Time and Expenses

Finance
Banking
Projects
Payable
Receivables
Sales Orders
Purchases
Inventory
More Items

* Financial Year: 2018 User-Defined Periods

Start Date: 1/1/2018

Number of Periods: 12

Period Nbr.	Financial Period ID	Start Date	End Date	Description	Close GL	Status	Close AP	Close AR	Close IN	Close CA	Close FA
01	01-2018	1/1/2018	1/31/2018	January	<input checked="" type="checkbox"/>	Locked	<input checked="" type="checkbox"/>				
02	02-2018	2/1/2018	2/28/2018	February	<input checked="" type="checkbox"/>	Closed	<input checked="" type="checkbox"/>				
03	03-2018	3/1/2018	3/31/2018	March	<input checked="" type="checkbox"/>	Closed	<input checked="" type="checkbox"/>				
04	04-2018	4/1/2018	4/30/2018	April	<input checked="" type="checkbox"/>	Open	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
05	05-2018	5/1/2018	5/31/2018	May	<input checked="" type="checkbox"/>	Open	<input type="checkbox"/>				
06	06-2018	6/1/2018	6/30/2018	June	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
07	07-2018	7/1/2018	7/31/2018	July	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
08	08-2018	8/1/2018	8/31/2018	August	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
09	09-2018	9/1/2018	9/30/2018	September	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
10	10-2018	10/1/2018	10/31/2018	October	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
11	11-2018	11/1/2018	11/30/2018	November	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
12	12-2018	12/1/2018	12/31/2018	December	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				

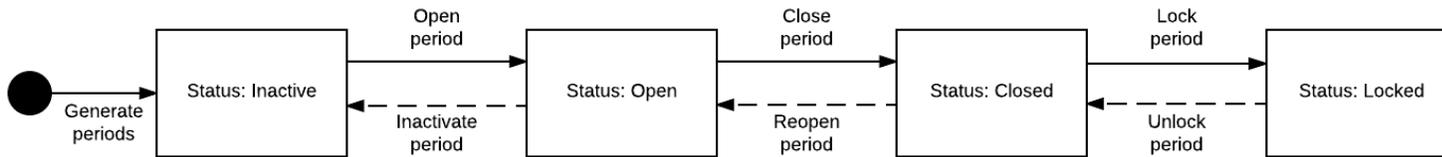
<input checked="" type="checkbox"/>	< Changed >	<input type="button" value="Apply"/>	<input checked="" type="checkbox"/>				
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I started off with the Idea of Inline Status-Change control. It works perfect in one-period-change approach when Subledger-User or GL-user performs only 1-period Status Change as a single task.

In this Case by merely clicking the Arrow Left-Right - status changes and the Dialog will appear "Are you sure?" or "post docs and Approve/Finish Task". And of course confirm or cancel buttons

But it lacks one Crucial part - trigger-action button 'Apply'

4-steps process Period Change Types



1

Single Period Change

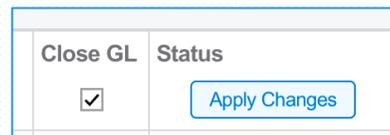
The most common case and also the easiest one. Check subledger (or GL) box and then change status by simple Arrows Control selector which reminds me Date Range month navigation.

The main question for me here is - should we add trigger-action button in each row (yep, we should widen Status field in order to add placement for the 'Apply' button which finishes process.

2

Group-Select for the same statuses

This case adds necessity for trigger-action 'Apply Changes' action which appears in the Header when more than 1 same status rows was selected.



This case is easy to apply and could be implemented without any headaches.

3

Multi-Select - the whole Period

This case is the most complex one in the applying - due to too many issues should be analyzed in order to clarify the logic and create use-flow needed for all the small issues we will meet here.

So, clean restrictions should be made in order to make it useable - e.g. the case of Unlocking Period (when All the periods have the same (Locked) statuses.

It's too damn complex 😞
and **unuseable**

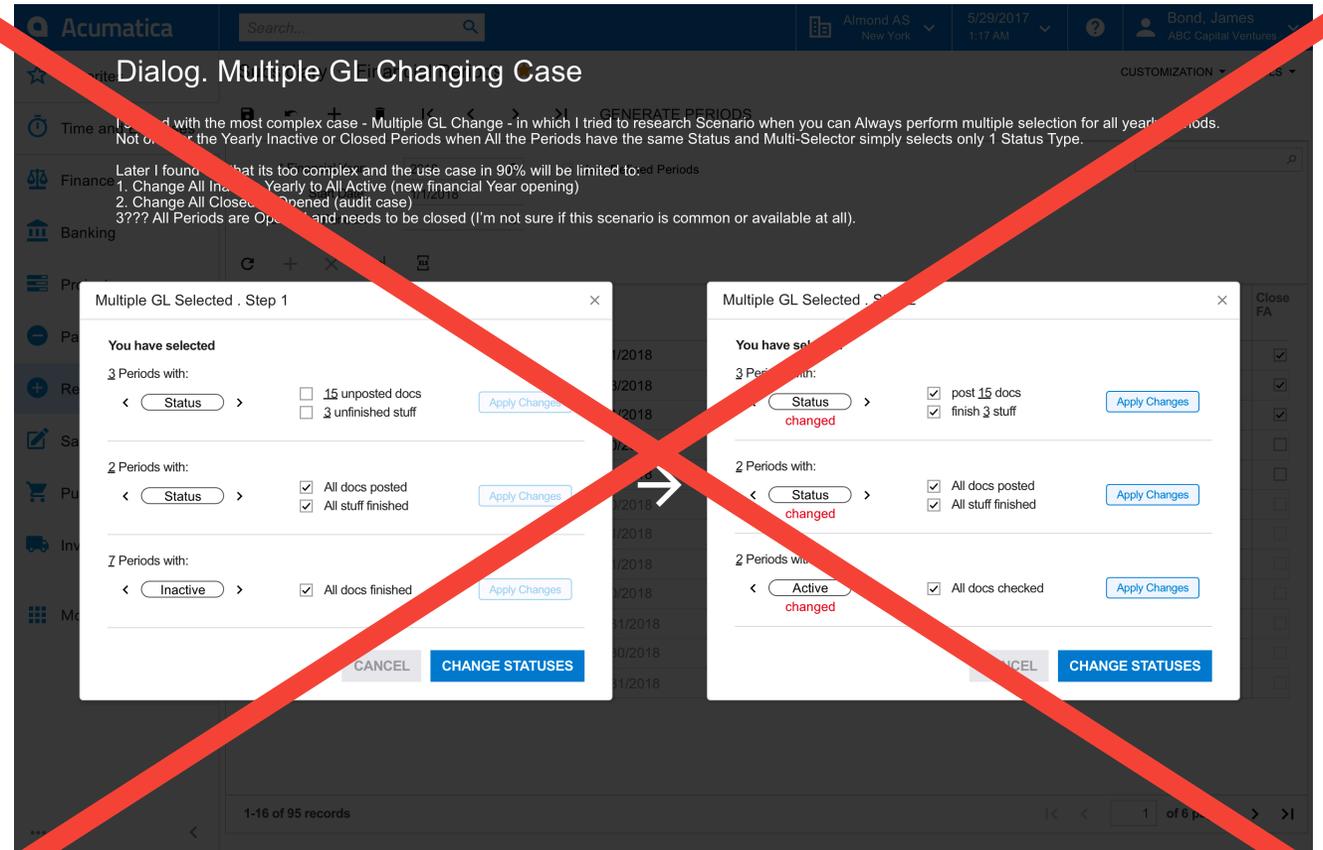
Dialogs

In the beginning I tried to solve multiple-period change case - and it was wrong

Approve dialogs should appear on every 'status change' iteration.

It should be simple and clean. Dialog shows only similar status objects - in accordance with scenarios.

Error states also should be considered and dealt with.



Inline Status Change Component

**Finalizing Idea of the Inline Status-Change
component of Financial Periods Closing and
Changing Status Tasks.**

Trigger-actions and Usability.

Objectification

		04	04-2018	4/1/2018	4/30/2018	Apr	<input checked="" type="checkbox"/>	< Open >	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
		05	05-2018	5/1/2018	5/31/2018	May	<input checked="" type="checkbox"/>	< Open >	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<div style="display: flex; justify-content: space-around; align-items: center;"> < Inactive > < Open > < Closed > < Locked > </div>													
		08	08-2018	8/1/2018	8/31/2018	Aug	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		09	09-2018	9/1/2018	9/30/2018	Sep	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		10	10-2018	10/1/2018	10/31/2018	Oct	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		11	11-2018	11/1/2018	11/30/2018	Nov	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Each status has it's own color – making it easy to perform the group status changes.

We can see periods with same statuses. We can easily select group or merely change them to needed and then press Apply btn.

If you selected and changed few same statuses but didn't press Apply and then you try change other status – confirmation window could appear "Are you sure you want to skip unfinished process"? Why "Could" appear?

I'm not certain here – particularly when you use GL-checkboxes (IMO) it is reasonable that you should check only similar statuses and when you click different status – your previous choice will be nullified without warning. So the user will learn it.

People actually hates dialog boxes. And I don't see any reason, why we should prevent users for playing games, realizing how easily it works without interruptive messages.

* Financial Year: User-Defined Periods

Start Date:

Number of Periods:

<input checked="" type="checkbox"/>	<	Changed	>	<input type="button" value="Apply"/>	<input checked="" type="checkbox"/>														
<input type="button" value="🔍"/>	<input type="button" value="📄"/>	01	01-2018	1/1/2018	1/31/2018	Jan	<input checked="" type="checkbox"/>	< Locked >	<input type="button" value="Apply"/>	<input checked="" type="checkbox"/>									
<input type="button" value="🔍"/>	<input type="button" value="📄"/>	02	02-2018	2/1/2018	2/28/2018	Feb	<input checked="" type="checkbox"/>	< Closed >	<input type="button" value="Apply"/>	<input checked="" type="checkbox"/>									
<input type="button" value="🔍"/>	<input type="button" value="📄"/>	03	03-2018	3/1/2018	3/31/2018	Mar	<input checked="" type="checkbox"/>	< Closed >		<input checked="" type="checkbox"/>									
<input type="button" value="🔍"/>	<input type="button" value="📄"/>	04	04-2018	4/1/2018	4/30/2018	Apr	<input checked="" type="checkbox"/>	< Open >		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="button" value="🔍"/>	<input type="button" value="📄"/>	05	05-2018	5/1/2018	5/31/2018	May	<input checked="" type="checkbox"/>	< Open >		<input type="checkbox"/>									
<input type="button" value="🔍"/>	<input type="button" value="📄"/>	06	06-2018	6/1/2018	6/30/2018	Jun	<input type="checkbox"/>	< Inactive >		<input type="checkbox"/>									
<input type="button" value="🔍"/>	<input type="button" value="📄"/>	07	07-2018	7/1/2018	7/31/2018	Jul	<input type="checkbox"/>	< Inactive >		<input type="checkbox"/>									
<input type="button" value="🔍"/>	<input type="button" value="📄"/>	08	08-2018	8/1/2018	8/31/2018	Aug	<input type="checkbox"/>	< Inactive >		<input type="checkbox"/>									
<input type="button" value="🔍"/>	<input type="button" value="📄"/>	09	09-2018	9/1/2018	9/30/2018	Sep	<input type="checkbox"/>	< Inactive >		<input type="checkbox"/>									
<input type="button" value="🔍"/>	<input type="button" value="📄"/>	10	10-2018	10/1/2018	10/31/2018	Oct	<input type="checkbox"/>	< Inactive >		<input type="checkbox"/>									
<input type="button" value="🔍"/>	<input type="button" value="📄"/>	11	11-2018	11/1/2018	11/30/2018	Nov	<input type="checkbox"/>	< Inactive >		<input type="checkbox"/>									

I widen Status fields in order to fit in 'APPLY' button.

Finally, we have this solution with greatly improved UX. It's genuinely deals with All the Use Case scenarios. It's intuitive, easy-to-use - you don't need to learn and think twice - the logic behind this UX won't allow you make mistake.

<input type="button" value="🔍"/>	<input type="button" value="📄"/>	03	03-2018	3/1/2018	3/31/2018	Mar	<input checked="" type="checkbox"/>	< Closed >	<input type="button" value="Apply"/>	<input checked="" type="checkbox"/>				
<input type="button" value="🔍"/>	<input type="button" value="📄"/>	03	03-2018	3/1/2018	3/31/2018	Mar	<input checked="" type="checkbox"/>	< Closed >	<input type="button" value="Apply"/>	<input checked="" type="checkbox"/>				

Close GL	Status
<input checked="" type="checkbox"/>	 OPEN CLOSE  Apply
<input checked="" type="checkbox"/>	< Locked > Apply

Status-Change Legend

Status can be changed by clicking side arrows < > in the fields.

Step-by-step Order:



And of course people need some sort of **LEGEND** to refer to.

Status ⓘ


OPEN
CLOSE


< Locked >

< Closed >

< Closed >

< Open >

< Open >

< Inactive >

Status ⓘ


OPEN
CLOSE

Apply

Close
AP

Close
AR

In order to create really smooth user experience we should consider legend as a part of the user-process map. So you should be able to see if the locked status at the right edge of 4-steps and the Inactive status - at the left. Such reminder will be sufficient.

All the **changed** periods should be **highlighted**

Time and Expenses

Finance
Banking
Projects
Payable
Receivables
Sales Orders
Purchases
Inventory
More Items

* Financial Year: 2018 User-Defined Periods
Start Date: 1/1/2018
Number of Periods: 12

Period Nbr.	Financial Period ID	Start Date	End Date	Desc.	Close GL	Status	Close AP	Close AR	Close IN	Close CA	Close FA
01	01-2018	1/1/2018	1/31/2018	Jan	<input type="checkbox"/>	Locked	<input checked="" type="checkbox"/>				
02	02-2018	2/1/2018	2/28/2018	Feb	<input type="checkbox"/>	Closed	<input checked="" type="checkbox"/>				
03	03-2018	3/1/2018	3/31/2018	Mar	<input checked="" type="checkbox"/>	Closed	<input checked="" type="checkbox"/>				
04	04-2018	4/1/2018	4/30/2018	Apr	<input type="checkbox"/>	Open	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
05	05-2018	5/1/2018	5/31/2018	May	<input type="checkbox"/>	Open	<input type="checkbox"/>				
06	06-2018	6/1/2018	6/30/2018	Jun	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
07	07-2018	7/1/2018	7/31/2018	Jul	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
08	08-2018	8/1/2018	8/31/2018	Aug	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
09	09-2018	9/1/2018	9/30/2018	Sep	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
10	10-2018	10/1/2018	10/31/2018	Oct	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
11	11-2018	11/1/2018	11/30/2018	Nov	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
12	12-2018	12/1/2018	12/31/2018	Dec	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				

People tends to forget or frequently getting distracted - they need ability to see their changes and to check if everything is alright.

Case

All Inactive → All Active

As we can see - in-table 'Apply' button is not so good idea after all.

Time and Expenses

GENERATE PERIODS

* Financial Year: 2018 User-Defined Periods

Start Date: 1/1/2018

Number of Periods: 12

Period Nbr.	Financial Period ID	Start Date	End Date	Desc.	Close GL	Status	Close AP	Close AR	Close IN	Close CA	Close FA
01	01-2018	1/1/2018	1/31/2018	Jan	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
02	02-2018	2/1/2018	2/28/2018	Feb	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
03	03-2018	3/1/2018	3/31/2018	Mar	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
04	04-2018	4/1/2018	4/30/2018	Apr	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
05	05-2018	5/1/2018	5/31/2018	May	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
06	06-2018	6/1/2018	6/30/2018	Jun	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
07	07-2018	7/1/2018	7/31/2018	Jul	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
08	08-2018	8/1/2018	8/31/2018	Aug	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
09	09-2018	9/1/2018	9/30/2018	Sep	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
10	10-2018	10/1/2018	10/31/2018	Oct	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
11	11-2018	11/1/2018	11/30/2018	Nov	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
12	12-2018	12/1/2018	12/31/2018	Dec	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				

Time and Expenses

GENERATE PERIODS

* Financial Year: 2018 User-Defined Periods

Start Date: 1/1/2018

Number of Periods: 12

Period Nbr.	Financial Period ID	Start Date	End Date	Desc.	Close GL	Status	Close AP	Close AR	Close IN	Close CA	Close FA
01	01-2018	1/1/2018	1/31/2018	Jan	<input checked="" type="checkbox"/>	< Open >	<input checked="" type="checkbox"/>				
02	02-2018	2/1/2018	2/28/2018	Feb	<input checked="" type="checkbox"/>	< Open >	<input checked="" type="checkbox"/>				
03	03-2018	3/1/2018	3/31/2018	Mar	<input checked="" type="checkbox"/>	< Open >	<input checked="" type="checkbox"/>				
04	04-2018	4/1/2018	4/30/2018	Apr	<input checked="" type="checkbox"/>	< Open >	<input checked="" type="checkbox"/>				
05	05-2018	5/1/2018	5/31/2018	May	<input checked="" type="checkbox"/>	< Open >	<input checked="" type="checkbox"/>				
06	06-2018	6/1/2018	6/30/2018	Jun	<input checked="" type="checkbox"/>	< Open >	<input checked="" type="checkbox"/>				
07	07-2018	7/1/2018	7/31/2018	Jul	<input checked="" type="checkbox"/>	< Open >	<input checked="" type="checkbox"/>				
08	08-2018	8/1/2018	8/31/2018	Aug	<input checked="" type="checkbox"/>	< Open >	<input checked="" type="checkbox"/>				
09	09-2018	9/1/2018	9/30/2018	Sep	<input checked="" type="checkbox"/>	< Open >	<input checked="" type="checkbox"/>				
10	10-2018	10/1/2018	10/31/2018	Oct	<input checked="" type="checkbox"/>	< Open >	<input checked="" type="checkbox"/>				
11	11-2018	11/1/2018	11/30/2018	Nov	<input checked="" type="checkbox"/>	< Open >	<input checked="" type="checkbox"/>				
12	12-2018	12/1/2018	12/31/2018	Dec	<input checked="" type="checkbox"/>	< Open >	<input checked="" type="checkbox"/>				

Case

Few Inactive → Few Active

As we can see - in-table 'Apply' button is not so Nice solution as I thought before.

The screenshot displays the Acumatica interface for managing financial periods. The main window shows a table of financial periods for the year 2018, with columns for Period Nbr., Financial Period ID, Start Date, End Date, Desc., Close GL, Status, and various Close buttons (AP, AR, IN, CA, FA). The 'Status' column shows 'Inactive' for periods 01 through 11, and 'Open' for period 02. The 'Apply' button is visible next to the 'Status' column for each row.

Period Nbr.	Financial Period ID	Start Date	End Date	Desc.	Close GL	Status	Close AP	Close AR	Close IN	Close CA	Close FA
01	01-2018	1/1/2018	1/31/2018	Jan	<input checked="" type="checkbox"/>	Inactive	<input checked="" type="checkbox"/>				
02	02-2018	2/1/2018	2/28/2018	Feb	<input checked="" type="checkbox"/>	Open	<input checked="" type="checkbox"/>				
03	03-2018	3/1/2018	3/31/2018	Mar	<input checked="" type="checkbox"/>	Inactive	<input checked="" type="checkbox"/>				
04	04-2018	4/1/2018	4/30/2018	Apr	<input checked="" type="checkbox"/>	Inactive	<input checked="" type="checkbox"/>				
05	05-2018	5/1/2018	5/31/2018	May	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
06	06-2018	6/1/2018	6/30/2018	Jun	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
07	07-2018	7/1/2018	7/31/2018	Jul	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
08	08-2018	8/1/2018	8/31/2018	Aug	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
09	09-2018	9/1/2018	9/30/2018	Sep	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
10	10-2018	10/1/2018	10/31/2018	Oct	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				
11	11-2018	11/1/2018	11/30/2018	Nov	<input type="checkbox"/>	Inactive	<input type="checkbox"/>				

The interface also includes a sidebar with navigation options (Projects, Payable, Receivables, Sales Orders, Purchases, Inventory, More Items) and a top navigation bar with user information (Almond AS, New York, 5/29/2017, 1:17 AM, Bond, James, ABC Capital Ventures).

Case

Later, I found out that my inline 'APPLY' button is not so good – it's simply too many of them _(ツ)_/

Period Nbr.	Financial Period ID	Start Date	End Date	Description	Close GL	Status	Close AP	Close AR	Close IN	Close CA	Close FA
01	01-2018	1/1/2018	1/31/2018	January	<input checked="" type="checkbox"/>	< Locked >	<input checked="" type="checkbox"/>				
02	02-2018	2/1/2018	2/28/2018	February	<input checked="" type="checkbox"/>	< Closed >	<input checked="" type="checkbox"/>				
03	03-2018	3/1/2018	3/31/2018	March	<input checked="" type="checkbox"/>	< Closed >	<input checked="" type="checkbox"/>				
04	04-2018	4/1/2018	4/30/2018	April	<input checked="" type="checkbox"/>	< Open >	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
05	05-2018	5/1/2018	5/31/2018	May	<input checked="" type="checkbox"/>	< Open >	<input type="checkbox"/>				
06	06-2018	6/1/2018	6/30/2018	June	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
07	07-2018	7/1/2018	7/31/2018	July	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
08	08-2018	8/1/2018	8/31/2018	August	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
09	09-2018	9/1/2018	9/30/2018	September	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
10	10-2018	10/1/2018	10/31/2018	October	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
11	11-2018	11/1/2018	11/30/2018	November	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
12	12-2018	12/1/2018	12/31/2018	December	<input type="checkbox"/>	< Inactive >	<input type="checkbox"/>				

CANCEL SAVE CHANGES

18	October	<input type="checkbox"/>	< Open >	<input type="checkbox"/>						
18	November	<input type="checkbox"/>	< Open >	<input type="checkbox"/>						
18	December	<input type="checkbox"/>	< Open >	<input type="checkbox"/>						

CANCEL SAVE CHANGES

It makes sense if we place trigger-action button away from the status cells (moving it to the bottom row).

Just imaging situation in which you select/change few same statuses - see the ← image - which Apply you should ...Apply ?)

<input checked="" type="checkbox"/>	< Closed >	<input type="button" value="Apply"/>	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/>	< Closed >	<input type="button" value="Apply"/>	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/>	< Closed >	<input type="button" value="Apply"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Checkboxes & inline Controls



For any row and for any Roles (Supervisor, sub-ledgers) checkboxes should be connected with the 'status-change inline-control' – you don't necessarily need to check them, you could click an arrow control and status changing will automatically check correspondent box(es) in a row.

My thoughts are - we need to investigate situations in which user starting to check boxes and then decides to switch and changes status and vice versa. Maybe its wiser not to give GL-supervisors ability to check boxes – instead they could use 'status-change' inline control more frequently.

But in case of 'Inactive' status we should make available overall GL-checkbox in order to select All the periods (Yearly)

Or, we could simply add 1st prior-row and make it All periods in the Financial year (it will work fine in case of Locked past periods as well as Inactive future Financial Years. And we will get rid of checkboxes in the header. (the way user could add 13th row for Adjustments – the same way we should add 1st row for overall periods selection when this option make sense and able.

I have an Idea of how we can achieve solid logic for **checkboxes** and **inline-control** behavior on each of **4 steps**.

Case

Time and Expenses

Finance

Banking

Projects

Payable

Receivables

Sales Orders

Purchases

Inventory

More Items

* Financial Year: 2018 User-Defined Periods

Start Date: 1/1/2018

Number of Periods: 12

Period Nbr.	Financial Period ID	Start Date	End Date	Description	GL	Status	AP	AR	IN	CA	FA
2018	01-2018	1/1/2018	12/31/2018	2018 Year	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
01	01-2018	1/1/2018	1/31/2018	January	<input checked="" type="checkbox"/>	< Inactive >	<input checked="" type="checkbox"/>				
02	02-2018	2/1/2018	2/28/2018	February	<input checked="" type="checkbox"/>	< Inactive >	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
03	03-2018	3/1/2018	3/31/2018	March	<input checked="" type="checkbox"/>	< Inactive >	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
04	04-2018	4/1/2018	4/30/2018	April	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
05	05-2018	5/1/2018	5/31/2018	May	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
06	06-2018	6/1/2018	6/30/2018	June	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
07	07-2018	7/1/2018	7/31/2018	July	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
08	08-2018	8/1/2018	8/31/2018	August	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
09	09-2018	9/1/2018	9/30/2018	September	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
10	10-2018	10/1/2018	10/31/2018	October	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
11	11-2018	11/1/2018	11/30/2018	November	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				
12	12-2018	12/1/2018	12/31/2018	December	<input checked="" type="checkbox"/>	< Inactive >	<input type="checkbox"/>				

CANCEL SAVE CHANGES

- Purchases
- Inventory
- More Items

04	04-2018	4/1/2018	4/30/2018	April	<input type="checkbox"/>	< Open >	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
05	05-2018	5/1/2018	5/31/2018	May	<input type="checkbox"/>	< Open >	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
06	06-2018	6/1/2018	6/30/2018	June	<input type="checkbox"/>	< Open >	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
07	07-2018	7/1/2018	7/31/2018	July	<input type="checkbox"/>	< Open >	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
08	08-2018	8/1/2018	8/31/2018	August	<input type="checkbox"/>	< Open >	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
09	09-2018	9/1/2018	9/30/2018	September	<input type="checkbox"/>	< Open >	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	10-2018	10/1/2018	10/31/2018	October	<input type="checkbox"/>	< Open >	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	11-2018	11/1/2018	11/30/2018	November	<input type="checkbox"/>	< Open >	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	12-2018	12/1/2018	12/31/2018	December	<input type="checkbox"/>	< Open >	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CANCEL SAVE CHANGES

All Year Inactive →
All Year Active

An Extra row prior 12 months.

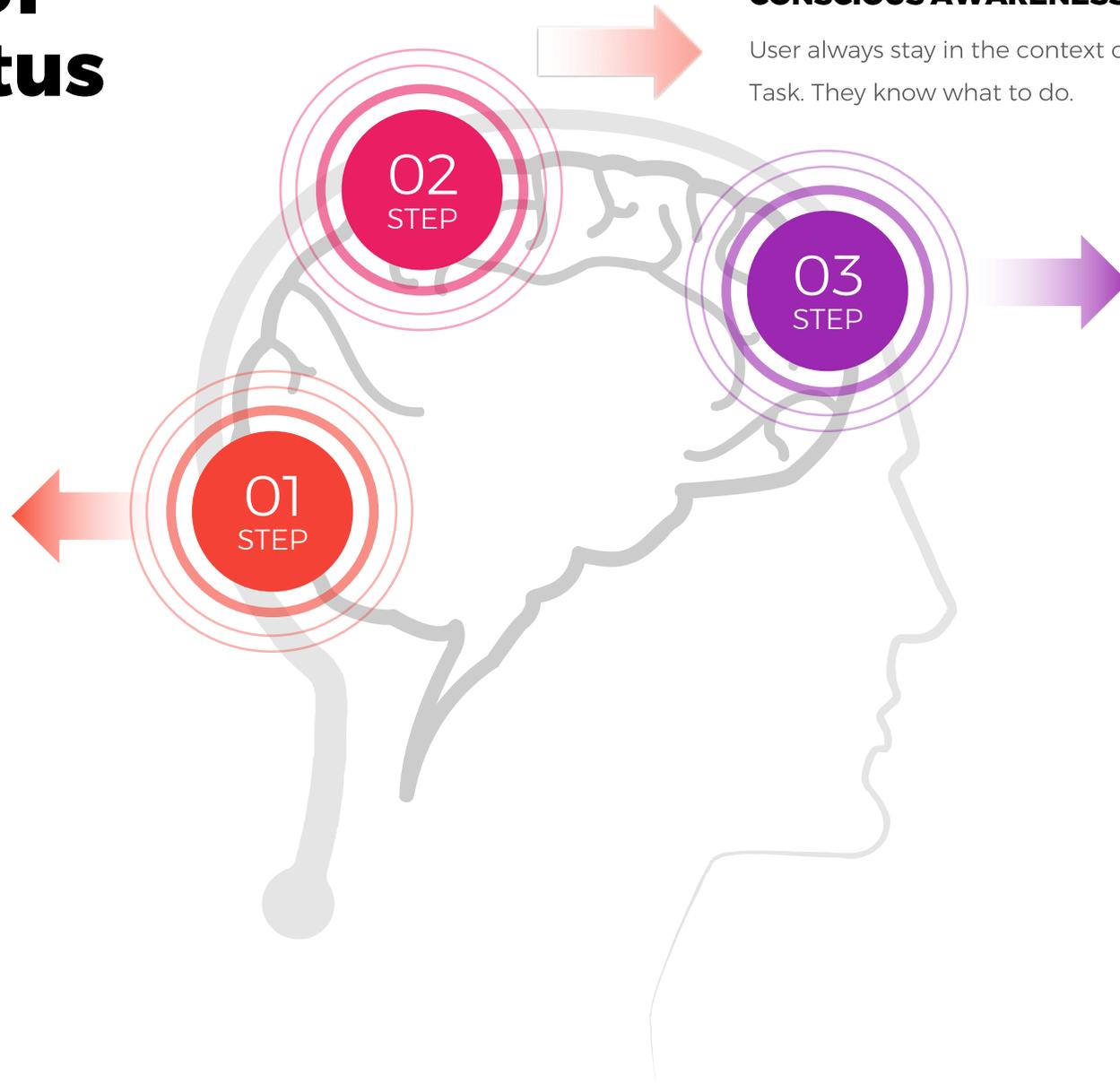
But how do we suppose to operate this inactive / locked row when month period statuses varies?

We should investigate. - We can disable it on steps Open-Close - Only Inactive-Locked states could be multiselected - changed.

Benefits of Inline status control

STRUCTURE

Strict logic and visible pleasure makes user experience smooth and behavior based on intuitive pattern recognition makes it game-like and enjoyable



CONSCIOUS AWARENESS

User always stay in the context of their Task. They know what to do.

IT TELLS WITHOUT A WORD

User interacts with many System and the good ones are always tells user everything without a word.



Of course - DIALOGS
should be further
researched and worked
through but you already
can have general idea of
the proposed solution on
overall UI lighten ups and
some UX tricks.

Acumatica Search... Almond AS New York 5/29/2017 1:17 AM Bond, James ABC Capital Ventures

Subsidiary Financial Periods **★** CUSTOMIZATION TOOLS

GENERATE PERIODS

* Financial Year: 2018 User-Defined Periods
Start Date: 1/1/2018
Number of Periods: 12

Period Nbr.	Financial Period ID	Start Date	End Date	Description	GL	Status	AP	AR	IN	CA	FA
2018	01-2018	1/1/2018	12/31/2018	2018 Year	<input type="checkbox"/>	< Open >	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
01	01-2018	1/1/2018	1/31/2018	January	<input checked="" type="checkbox"/>	< Locked >	<input checked="" type="checkbox"/>				
02	02-2018	2/1/2018	2/28/2018	February	<input type="checkbox"/>	< Open >	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
03	03-2018	3/1/2018	3/31/2018	March	<input type="checkbox"/>	< Open >	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
04	04-2018	4/1/2018	4/30/2018	April	<input type="checkbox"/>	< Open >	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
05	05-2018	5/1/2018	5/31/2018	May	<input type="checkbox"/>	< Open >	<input type="checkbox"/>				
06	06-2018	6/1/2018	6/30/2018	June	<input type="checkbox"/>	< Open >	<input type="checkbox"/>				
07	07-2018	7/1/2018	7/31/2018	July	<input type="checkbox"/>	< Open >	<input type="checkbox"/>				
08	08-2018	8/1/2018	8/31/2018	August	<input type="checkbox"/>	< Open >	<input type="checkbox"/>				
09	09-2018	9/1/2018	9/30/2018	September	<input type="checkbox"/>	< Open >	<input type="checkbox"/>				
10	10-2018	10/1/2018	10/31/2018	October	<input type="checkbox"/>	< Open >	<input type="checkbox"/>				
11	11-2018	11/1/2018	11/30/2018	November	<input type="checkbox"/>	< Open >	<input type="checkbox"/>				
12	12-2018	12/1/2018	12/31/2018	December	<input type="checkbox"/>	< Open >	<input type="checkbox"/>				

CANCEL SAVE CHANGES

1-16 of 95 records 1 of 6 pages

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Financial Periods Status Changes

THE END

Thanks!
