Allowing a user to bypass closing dates using a closing date exception window

Data Entry · https://infomed.com/docs/allowing-a-user-to-bypass-closing-dates-using-closing-date-exception-windows/

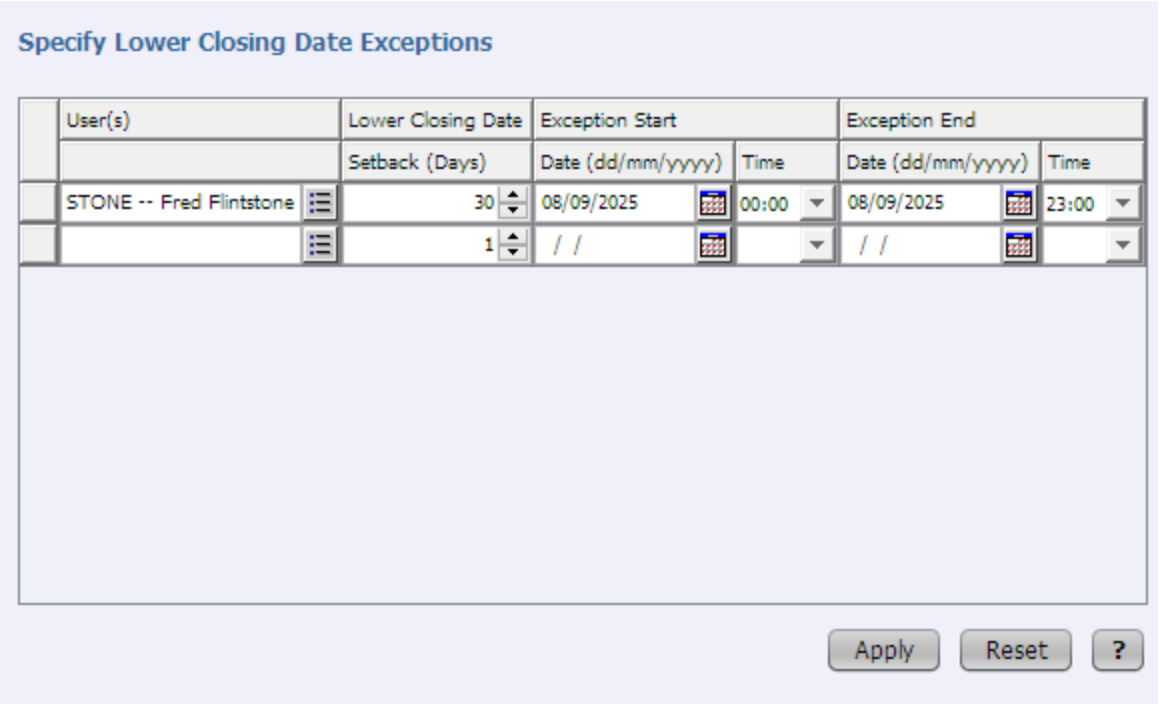
A feature called closing date exception windows can be used to allow one or more users a window of time where they can save/edit records for dates that would be otherwise protected by a closing date. This allows for certain users the ability to enter records without needing to remove the closing date entirely and open things up for all users.

For Example

Let's say users have 7 days after a month ends to enter their records before the prior month is closed. A user named Fred was off on vacation for two weeks and was not able to enter all of their records prior to the closing date being applied.

A closing date exception window can be created to allow Fred to enter his records:

1. Go to the **Data Entry** > **Closing Date** page.
2. In the '**Specify Lower Closing Date Exceptions**' section, create a new exception window for Fred:
   - Click into the blank row at the bottom of the table.
   - Click into the User(s) field and select Fred's user account.
   - Specify a number of setback days. This is the number of days relative to the lower closing date that the user will be able to make changes to.
   - Specify a start date and time. This is the start of the time frame that the user will be able to make changes.
   - Specify an end date and time. This is the end of the time frame that the user will be able to make changes. In other words, the dates will be closed again once this date and time is reached.
3. Click the Apply button below the table to save the changes.



The above closing date exception window would allow Fred to login on Sept.8 2025 and save records within a 30 day window relative to the current lower closing date that is set. All other non admin users will still be prevented from doing so.