GL-20 Run Open Period Program

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Run the Open Period Program for General Ledger (**GL**) in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the steps to run the open period program in NCFS. This enables you to open an accounting period of a ledger in NCFS.

Run Open Period Program

To Run Open Period Program in NCFS, please follow the steps below. There are 10 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

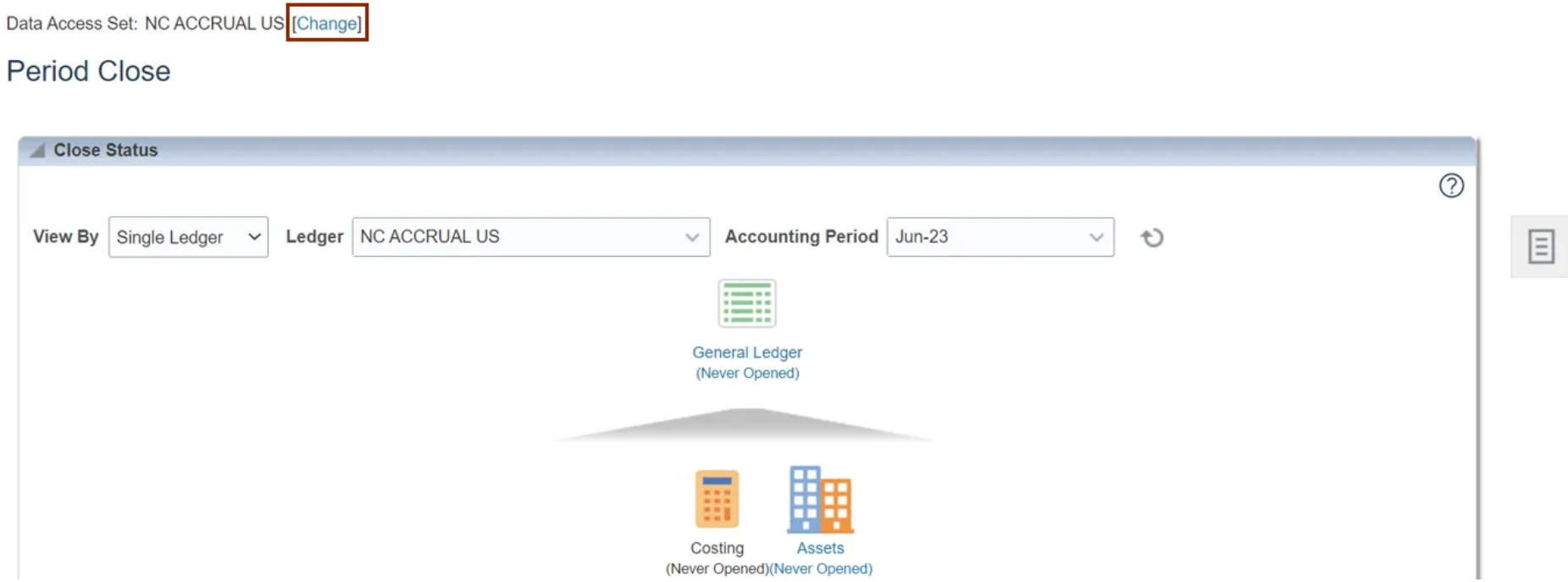
Step 2. On the **Home** page, click the **General Accounting** tab and click the **Period Close** app.

Image



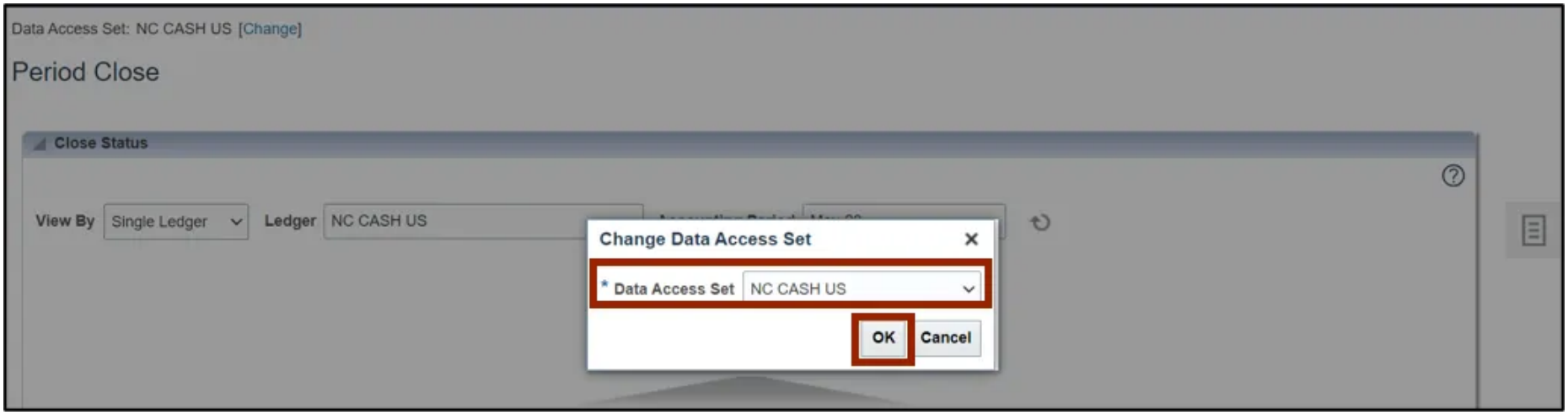
Step 3. On the **Period Close** page, if your desired Data Access Set does not display, click **Change** link.

Image



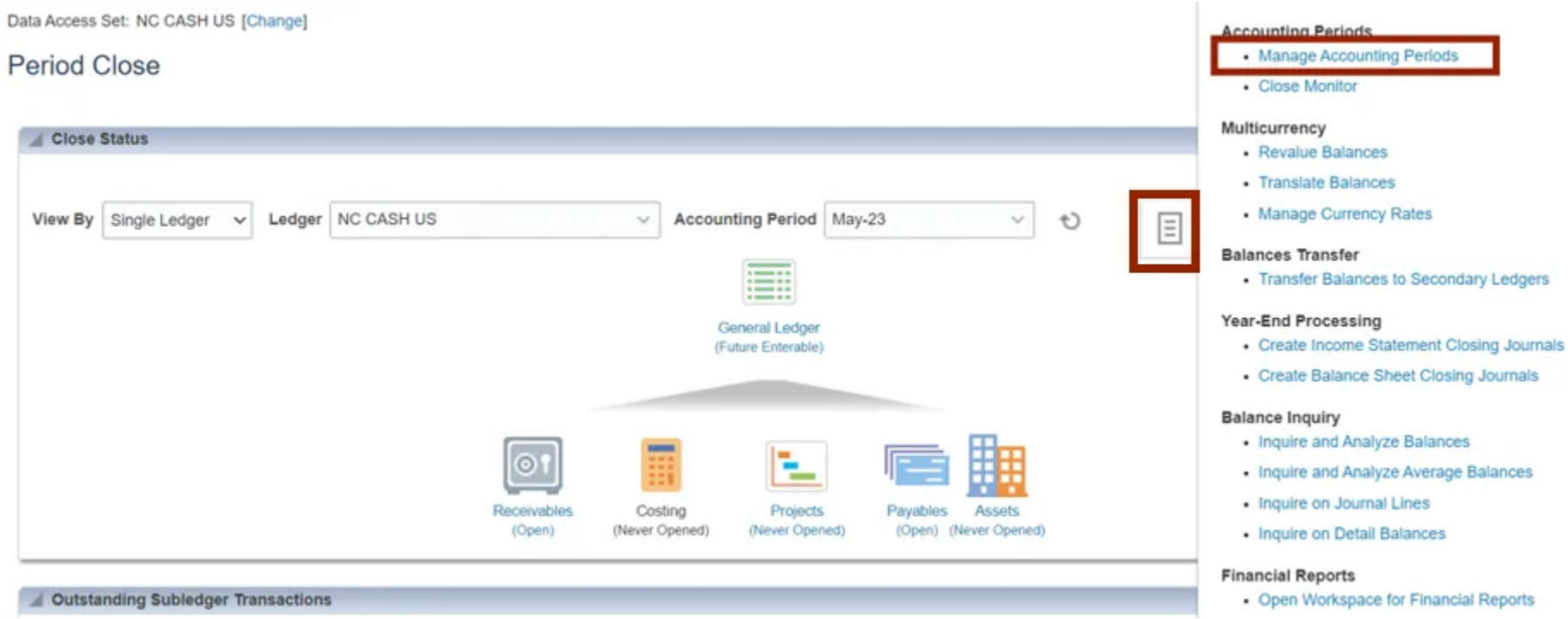
Step 4. The *Change Data Access Set* pop-up appears. On the ***Data Access Set*** field, select the desired choice from the drop-down choice list and click the **OK** button.

Image



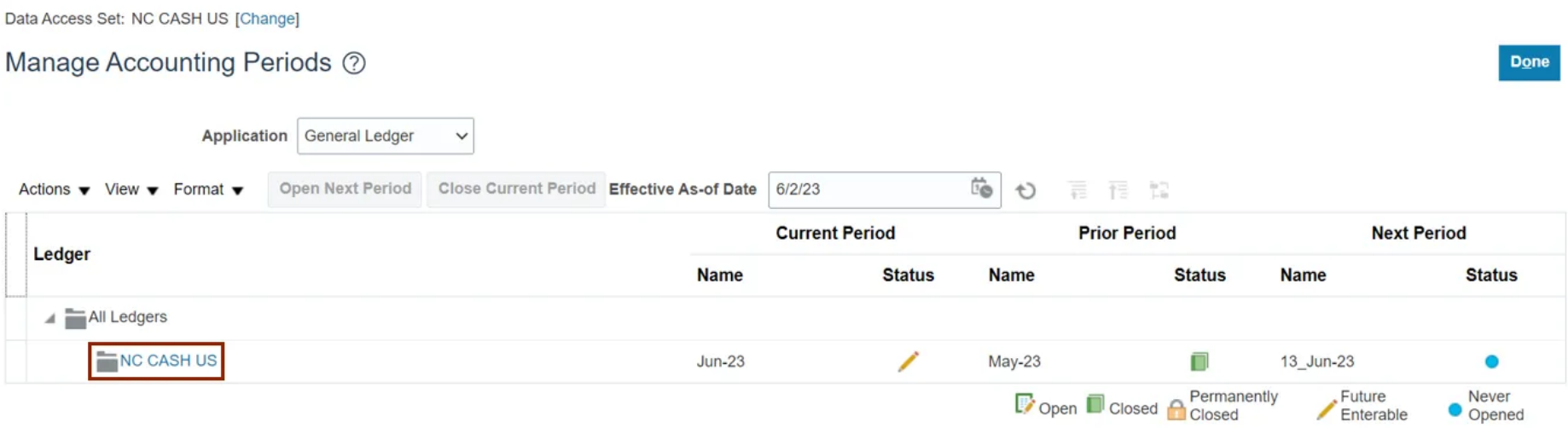
Step 5. Click the **Tasks** icon and click **Manage Accounting Periods**.

Image



Step 6. On the **Manage Accounting Periods** page, click the **Ledger** link whose period is to be opened.

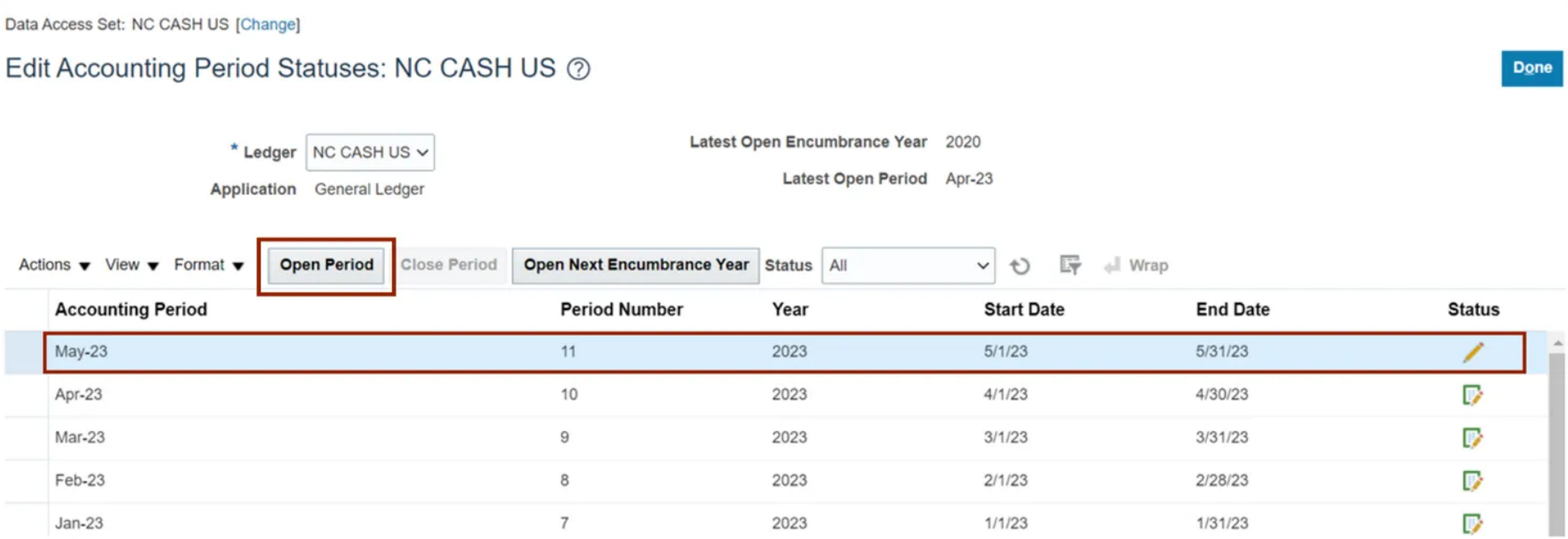
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Step 7. On the **Edit Accounting Period Statuses** page, select the **Accounting Period** to be opened.

In this example, we choose **May-23**. Click the **Open Period** button.

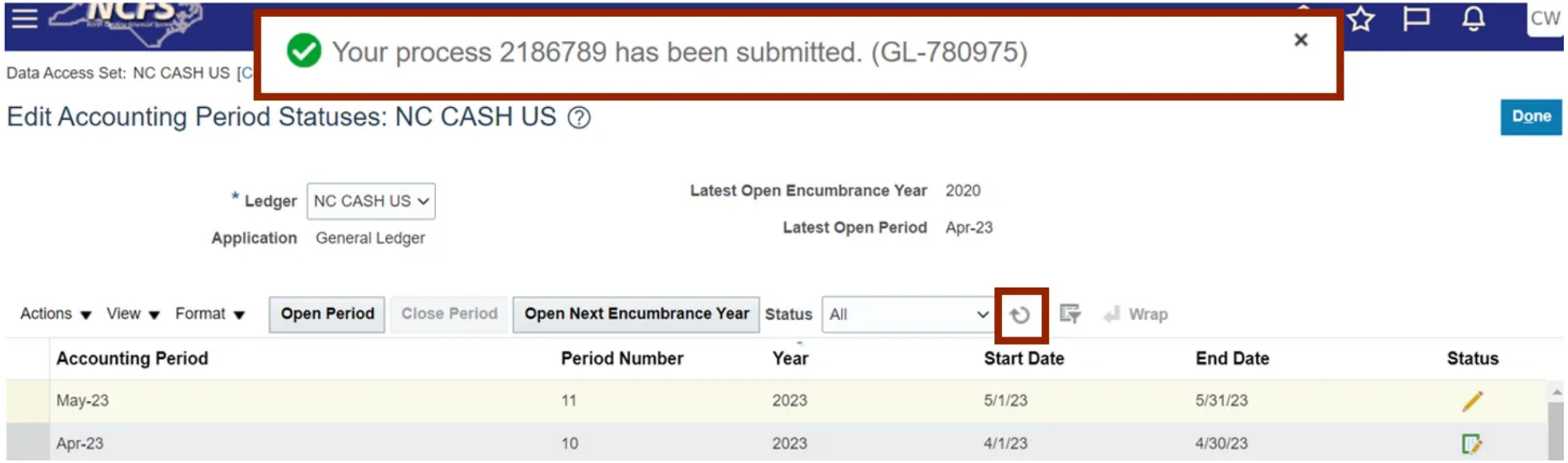
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Step 8. A pop-up appears with the process number, acknowledging that the request has been submitted.

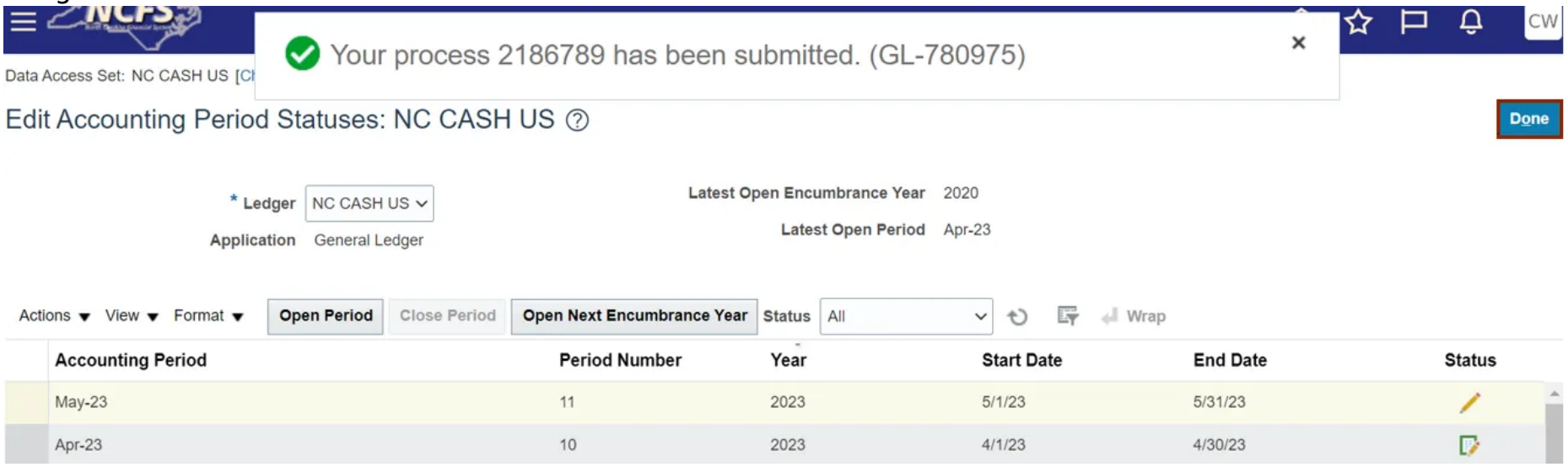
Note: Click the **Refresh** icon to review the updated status of the period. Users can alternatively navigate to the **Scheduled Processes** app to monitor status of the submitted process. If the **Status** value does not change from a pencil, navigate to **Scheduled Processes** to view the error.

Image



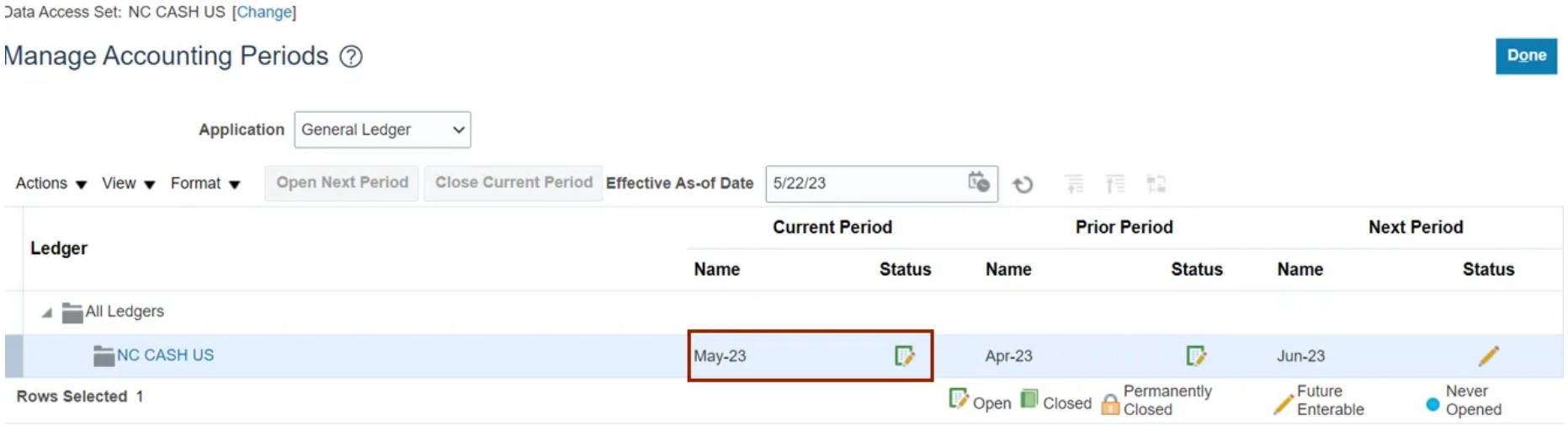
Step 9. Click the **Done** button. You are now redirected to the **Manage Accounting Periods** page.

Image



Step 10. The ***Status*** field displays the **Open** icon for the selected **Ledger**.

Image



Wrap-Up

Run open period program using the steps above to open an accounting period of a ledger.

Additional Resources

- Web Based Training (WBT)
  - GL 105: GL Period Management

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