How to open a purchasing period in Oracle EBS

This guide shows you how to open a purchasing period in Oracle EBS. You find the **Control Purchasing Periods** window in the Oracle Purchasing Navigator, search periods by fiscal year, and change a period's status to **Open**. You then save the change. The guide also shows how to open the matching period in **Inventory Accounting Periods**.

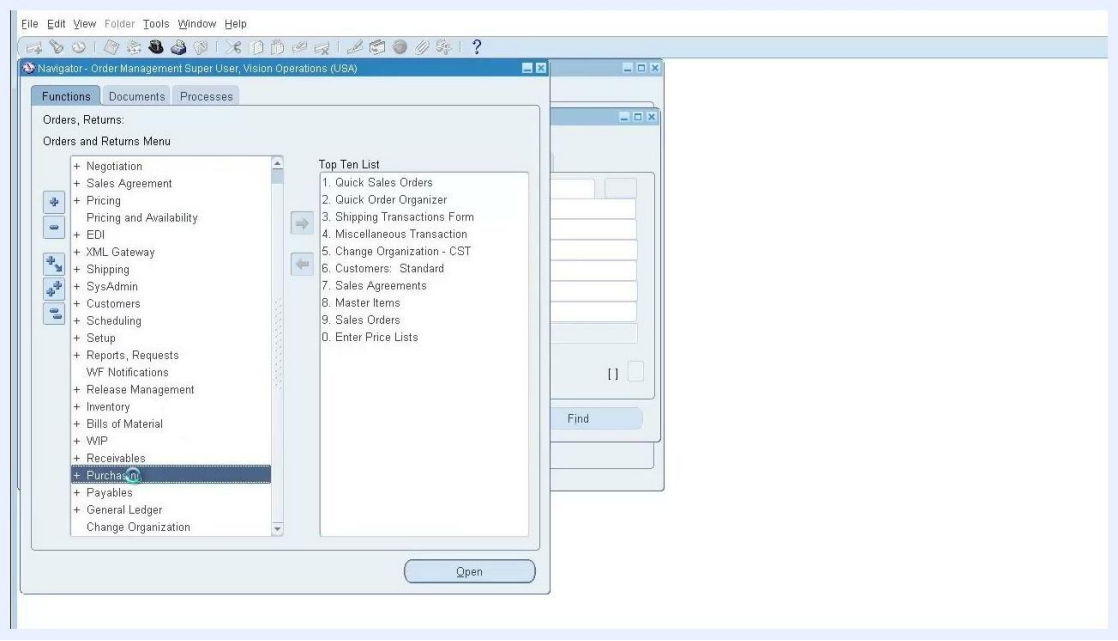
Prerequisites

- You are logged in to Oracle with a responsibility that has the right permissions, for example "Order Management Super User, Vision Operations (USA)".
- You can access the Oracle Purchasing Navigator, which has the **Functions**, **Documents**, and **Processes** tabs.

Steps

1. Open the Oracle Purchasing Navigator

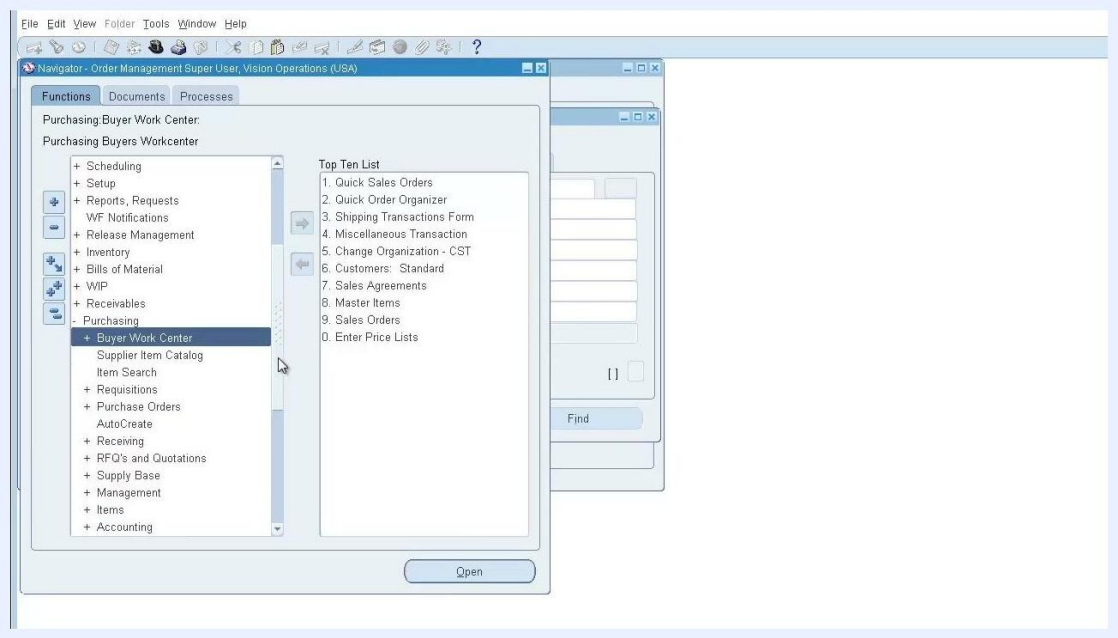
The main Navigator window appears with tabs for **Functions**, **Documents**, and **Processes**. The left pane shows a hierarchical menu with expandable categories such as **Negotiation**, **Sales Agreement**, **Pricing**, and **Purchasing**. The right pane shows a **Top Ten List** of frequently used functions.



Navigator window showing the hierarchical menu in the left pane and the Top Ten List in the right pane

2. Expand the Purchasing section

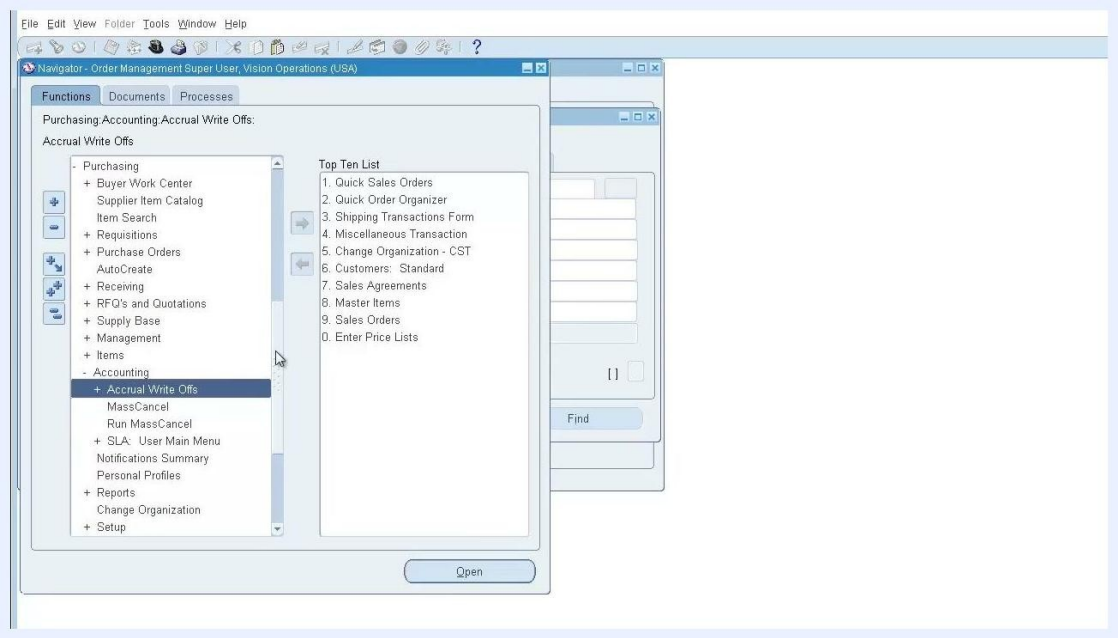
In the left pane, scroll down and click the "+" icon next to **Purchasing**. Click **Buyer Work Center** to highlight it. The right pane still shows the **Top Ten List**.



Purchasing section expanded with Buyer Work Center highlighted

3. Expand the Accounting section

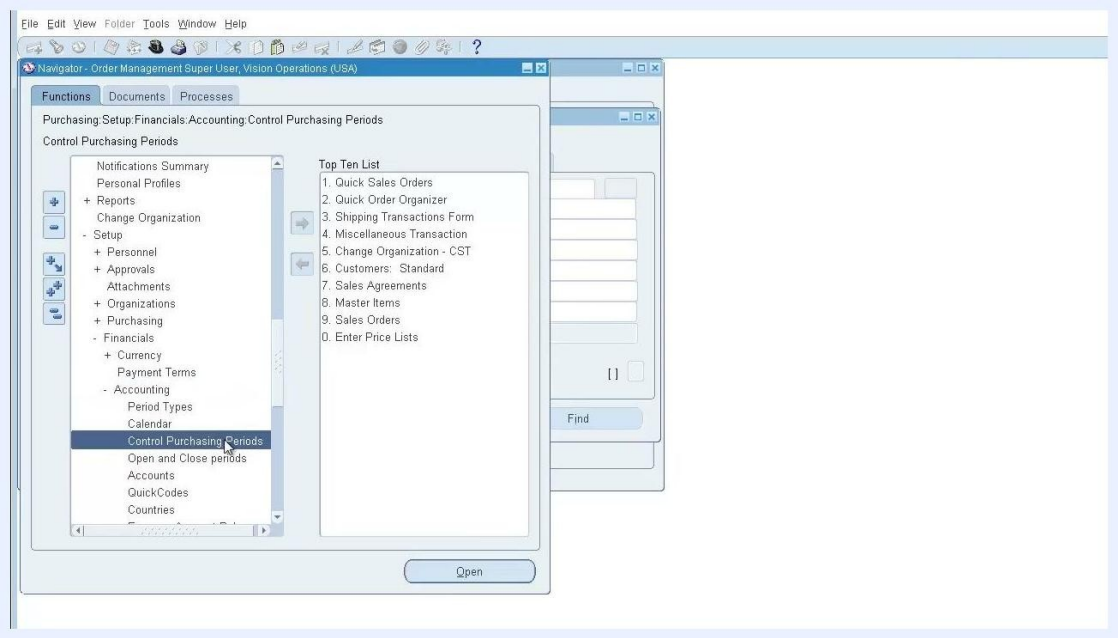
Keep scrolling in the left pane under **Purchasing**. Click the "+" icon next to **Accounting**, then click **Accrual Write Offs** to highlight it. Sub-options such as **MassCancel**, **Run MassCancel**, and **SLA: User Main Menu** appear.



Accounting section expanded with Accrual Write Offs highlighted

4. Find and open Control Purchasing Periods

Scroll further in the left pane to the **Setup** section. Expand **Setup** > **Financials** > **Accounting**, then click **Control Purchasing Periods** to highlight it. The right pane continues to show the **Top Ten List**.



Control Purchasing Periods highlighted under Setup > Financials > Accounting

Click **Open** at the bottom of the Navigator window. A new browser window or tab opens with the **Control Purchasing Periods** screen.

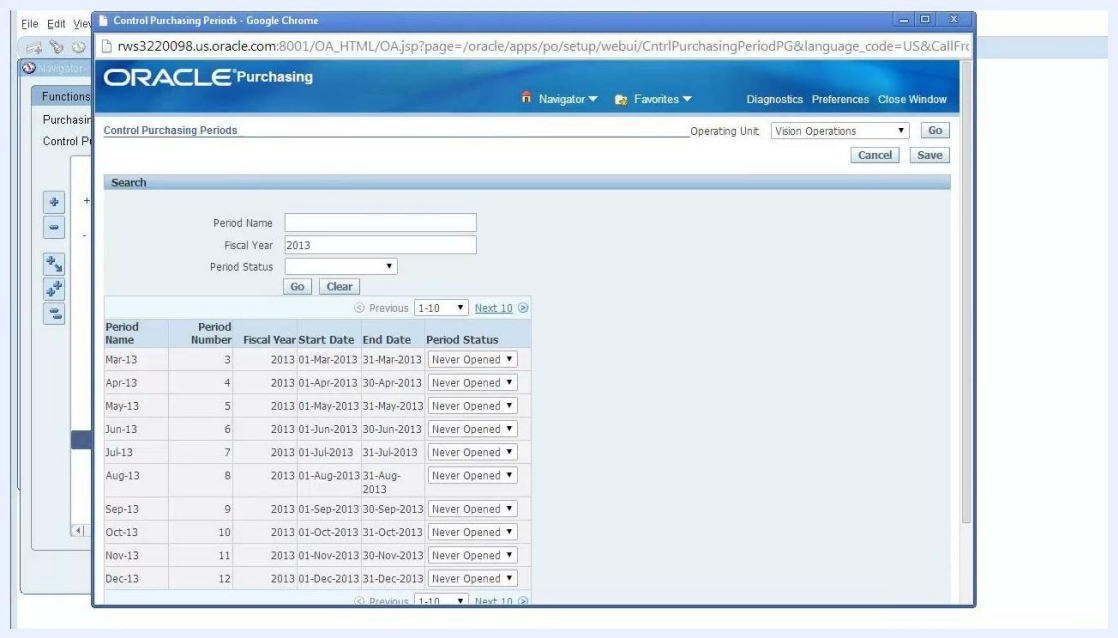
The screen has:

- A search section with the fields **Period Name**, **Fiscal Year**, and **Period Status**.
- A table with the columns **Period Name**, **Period Number**, **Fiscal Year**, **Start Date**, **End Date**, and **Period Status**.

By default, the table shows periods from previous years (for example, 1995 and 1996), all with the status **Closed**.

5. Search for a fiscal year

In the **Fiscal Year** field, enter the year you want (for example, "2013"). Click **Go**. The table updates to show the periods for that year. In this example, every 2013 period has the status **Never Opened**.

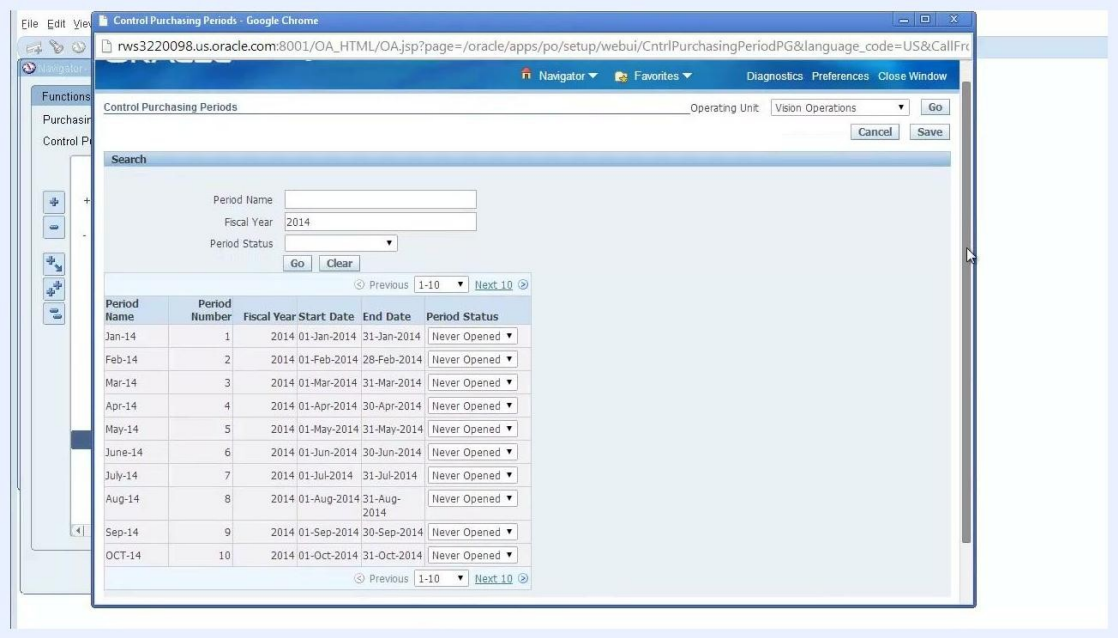


Fiscal Year field set to 2013 with the Go button clicked and 2013 periods listed

Use this step to check the status of the periods before you open any of them.

6. Search for another fiscal year

To look at a different year, change the **Fiscal Year** field (for example, to "2014") and click **Go** again. The table refreshes to show the periods for the new year. In this example, every 2014 period shows **Never Opened**.



Fiscal Year field set to 2014 with the 2014 periods displayed

7. Review the period status for fiscal year 2014

With **Fiscal Year** set to 2014 and **Period Name** and **Period Status** blank, review the table. Before you make changes:

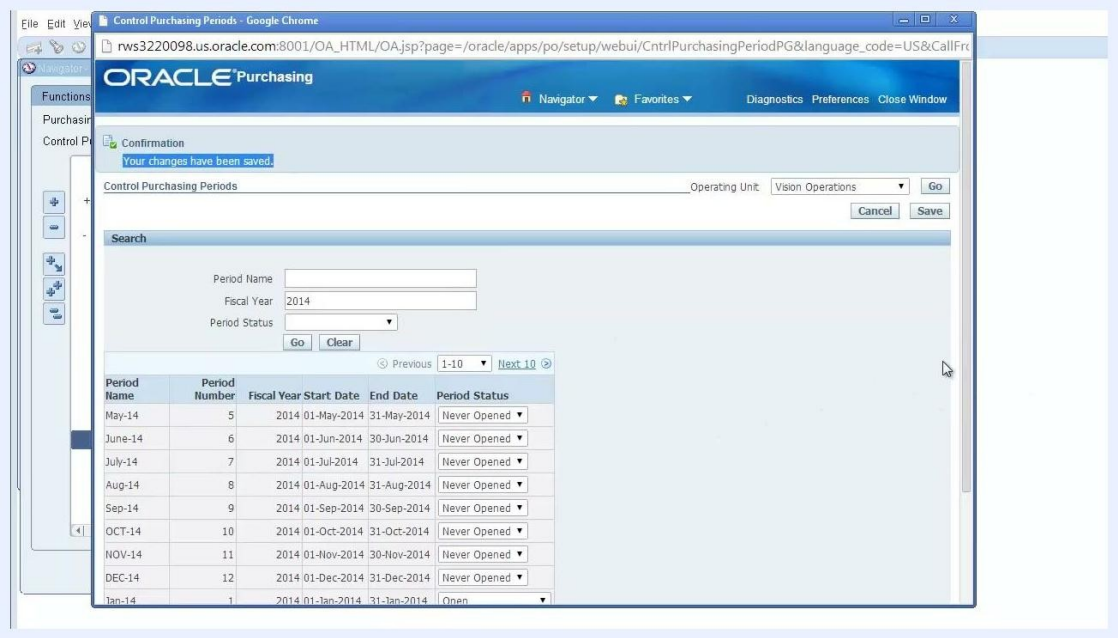
- **Jan-14** and **Feb-14** have the status **Open**.
- **Mar-14** and all later months have the status **Never Opened**.

8. Open the March and April 2014 purchasing periods

To open a purchasing period in Oracle EBS, use the dropdown menu in the **Period Status** column for each period. Set the status for **Mar-14** and **Apr-14** to **Open**, which replaces **Never Opened**. Then move the cursor to **Save**.

9. Save your changes

Click **Save**. The message "Your changes have been saved." appears at the top of the screen. The table now shows **Mar-14** and **Apr-14** as **Open**, and the other periods are unchanged.



Confirmation message "Your changes have been saved." with Mar-14 and Apr-14 set to Open

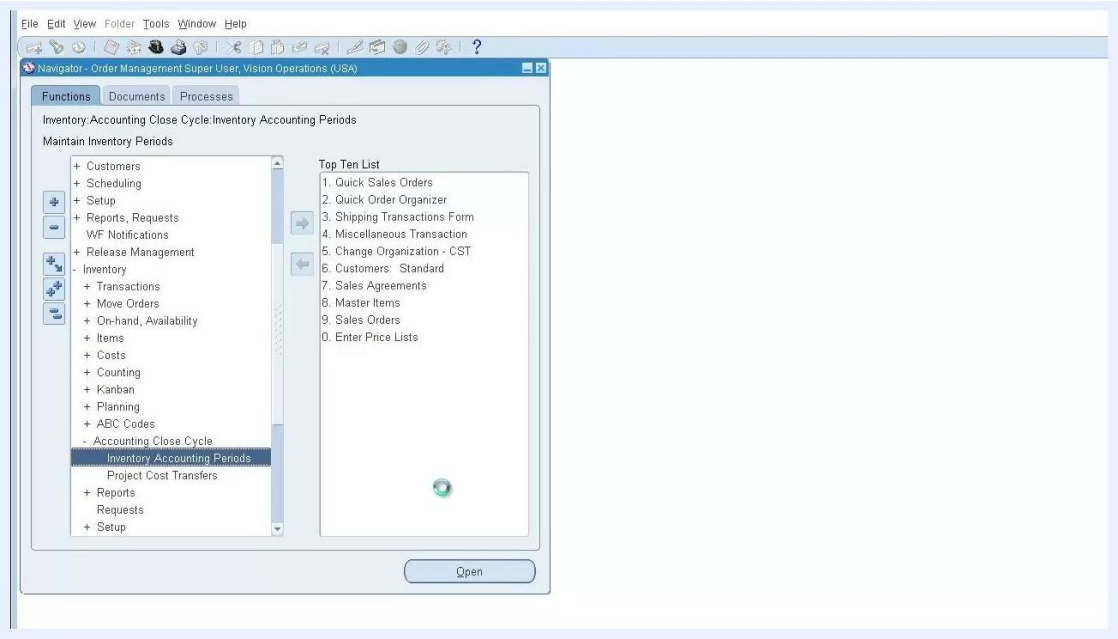
10. Page through the remaining periods

Review all the periods after you save. The table lists **May-14** through **Dec-14**, all with the status **Never Opened**. **Jan-14**, **Feb-14**, **Mar-14**, and **Apr-14** are **Open**.

Use the **Previous** and **Next** buttons to move through the table. Click **Previous** to see the earlier periods in the fiscal year. The table then shows only **Mar-14** and **Apr-14**, both **Open**.

11. Go to Inventory Accounting Periods

In the Navigator, expand **Inventory** > **Accounting Close Cycle** and highlight **Inventory Accounting Periods**. The **Top Ten List** stays visible. A spinning loading icon appears in the center of the window while the next screen loads.



Navigator with Inventory Accounting Periods highlighted and a loading indicator in the center

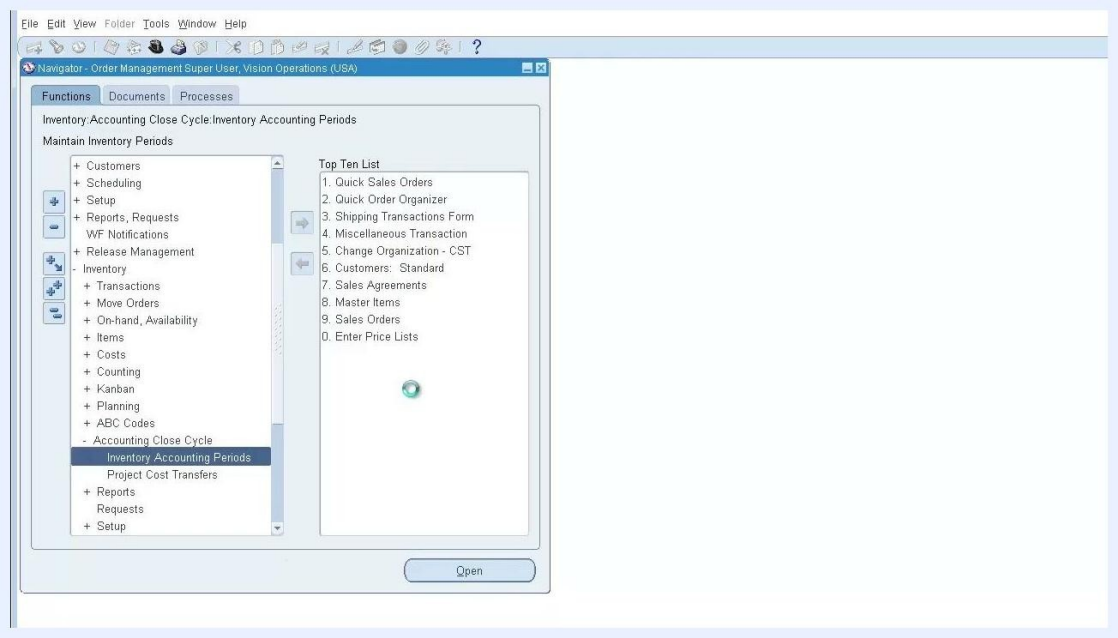
12. Select the inventory period to open

The **Inventory Accounting Periods** window opens. Its table has the columns **Status**, **Period**, **Num**, **Year**, **From**, **To**, and **Close Date**.

Select the row for **Mar-14** (Period 3, Year 2014, From 01-MAR-2014, To 31-MAR-2014). Its status is **Future**.

13. Start the status change

Click **Change Status...**. A **Caution** dialog box appears with the message "Open this period?" and the options **OK** and **Cancel**.



Inventory Accounting Periods window with the "Open this period?" confirmation dialog for Mar-14

14. Confirm that you want to open the period

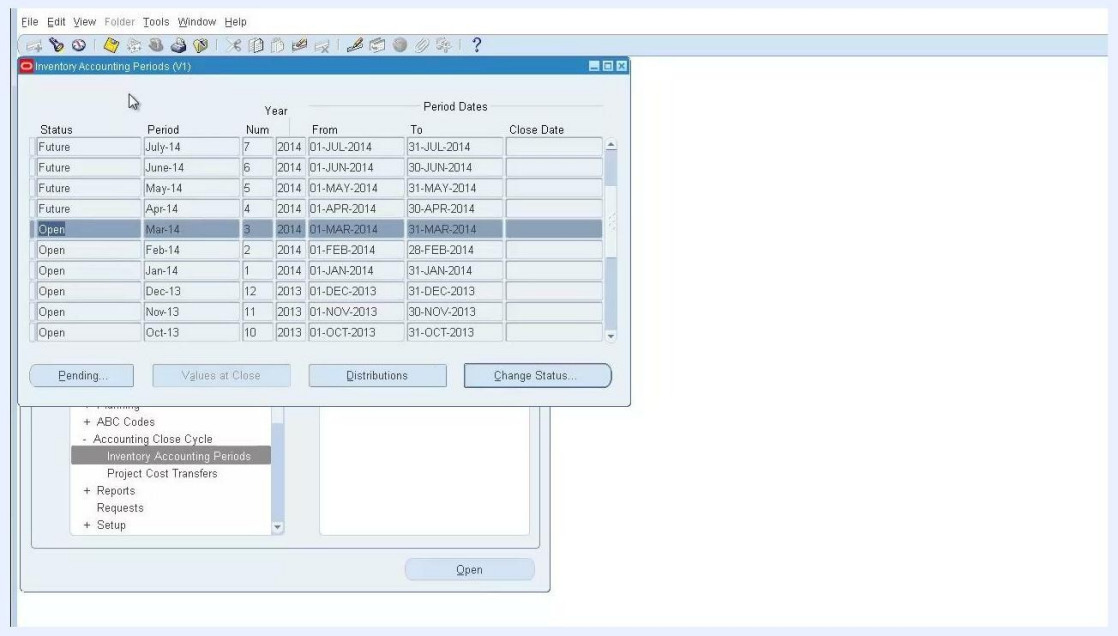
Click **OK** in the **Caution** dialog box.

15. Check that the period is open

The dialog box closes and the **Status** for **Mar-14** changes from **Future** to **Open**. No further confirmation message appears. The other periods keep their statuses:

- **Jan-14**, **Feb-14**, **Dec-13**, **Nov-13**, and **Oct-13** remain **Open**.

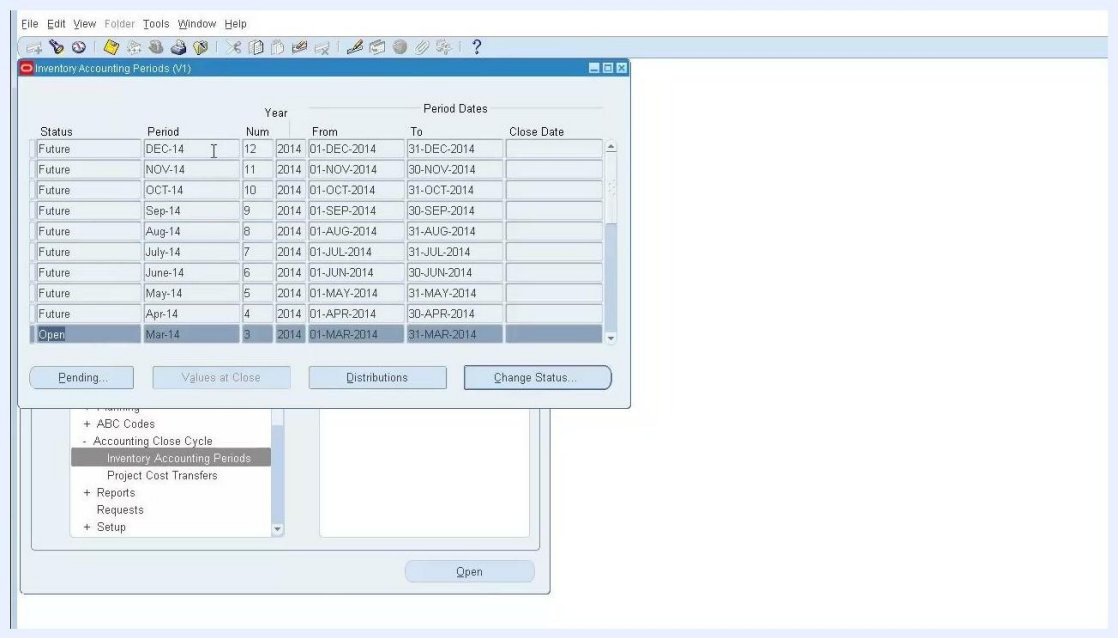
- **Apr-14**, **May-14**, and later periods remain **Future**.



Inventory Accounting Periods window with Mar-14 now set to Open

16. Scroll and verify the change

Scroll the table to see more periods. **Mar-14** stays **Open**, and every period from **Apr-14** through **Dec-14** is still **Future**. This confirms the change and shows that nothing else was affected.



Inventory Accounting Periods window showing Mar-14 as Open and all later periods as Future

Summary

- Expand the menu sections in the Navigator to find **Control Purchasing Periods**, then click **Open**.
- Search by **Fiscal Year** and click **Go** to review period statuses.
- Set the **Period Status** to **Open** for the periods you need, then click **Save**.
- Look for the message "Your changes have been saved."
- In **Inventory Accounting Periods**, select the period, click **Change Status...**, and click **OK** in the **Caution** dialog.
- Scroll the table to verify that only the period you chose changed to **Open**.

The **Control Purchasing Periods** window also has **Cancel** and **Save** options. You only need them when you intend to make changes.

What's next

- Repeat the steps for other fiscal years by changing the **Fiscal Year** field and clicking **Go**.
- Use **Previous** and **Next** to check that the periods you opened show the status you expect.