GL-08 View Period Management Dashboard

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step navigation of how to View the Period Management Dashboard in the North Carolina Financial System (**NCFS**).

Introduction and Overview

In this QRG, you will learn how to use the NCFS Period Management Dashboard to view the period statuses of the General Ledger and all the subledger modules, holistically.

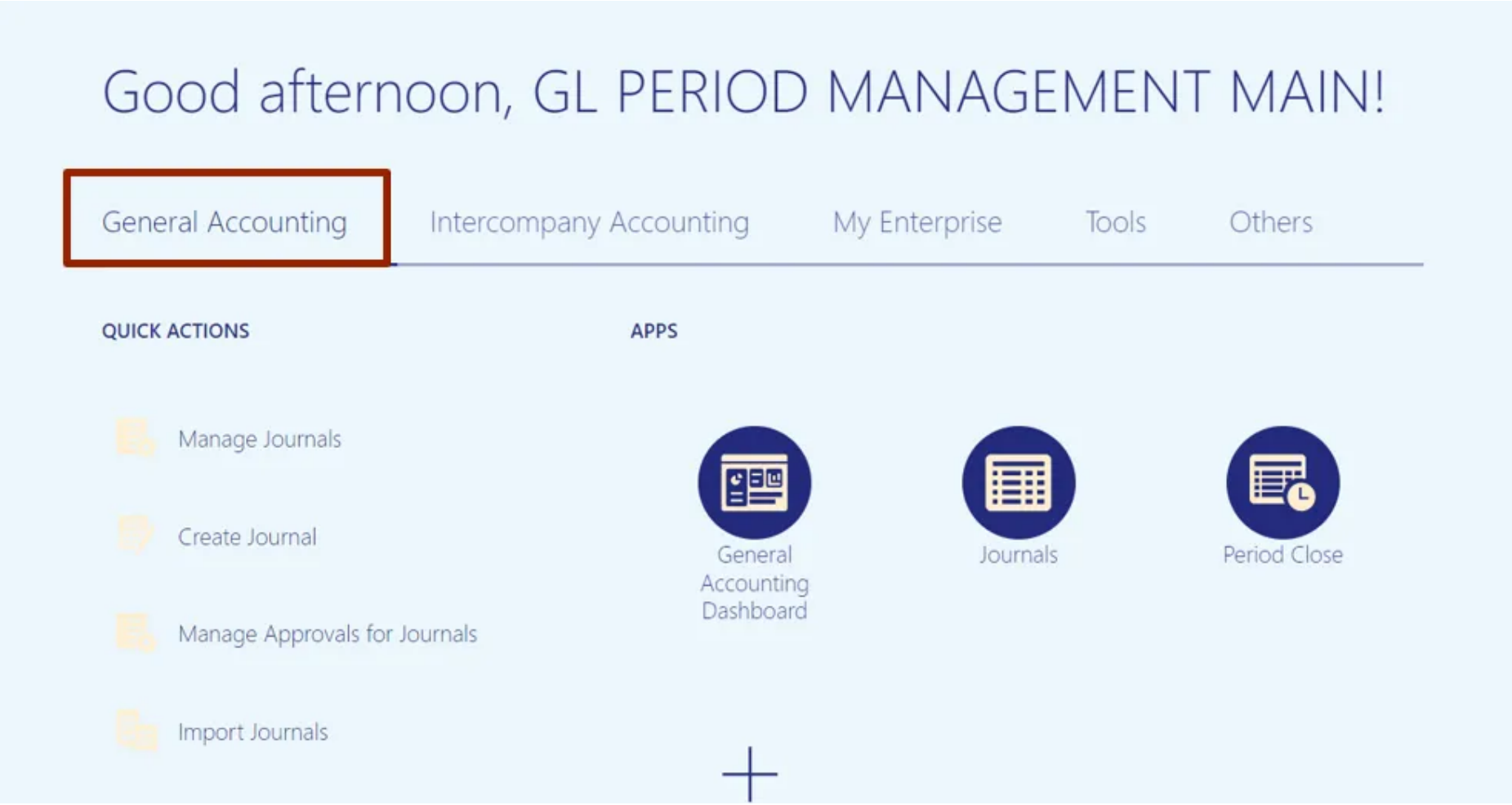
View Period Management Dashboard

To View the Period Management Dashboard in NCFS, please follow the steps below. There are 7 steps to complete this process.

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

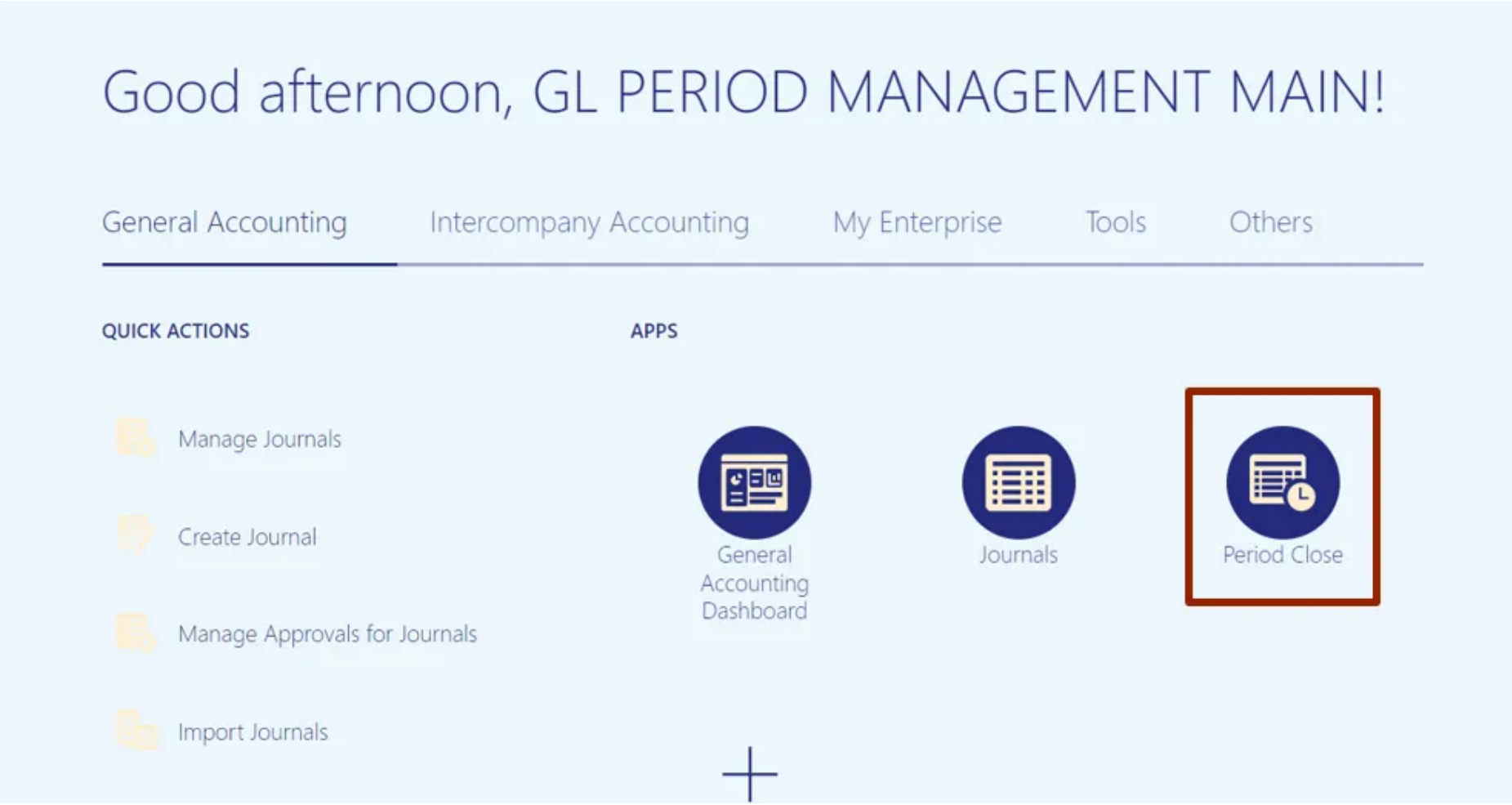
Step 2. On the **Home** page, click the **General Accounting** tab.

Image



Step 3. Click the **Period Close** app.

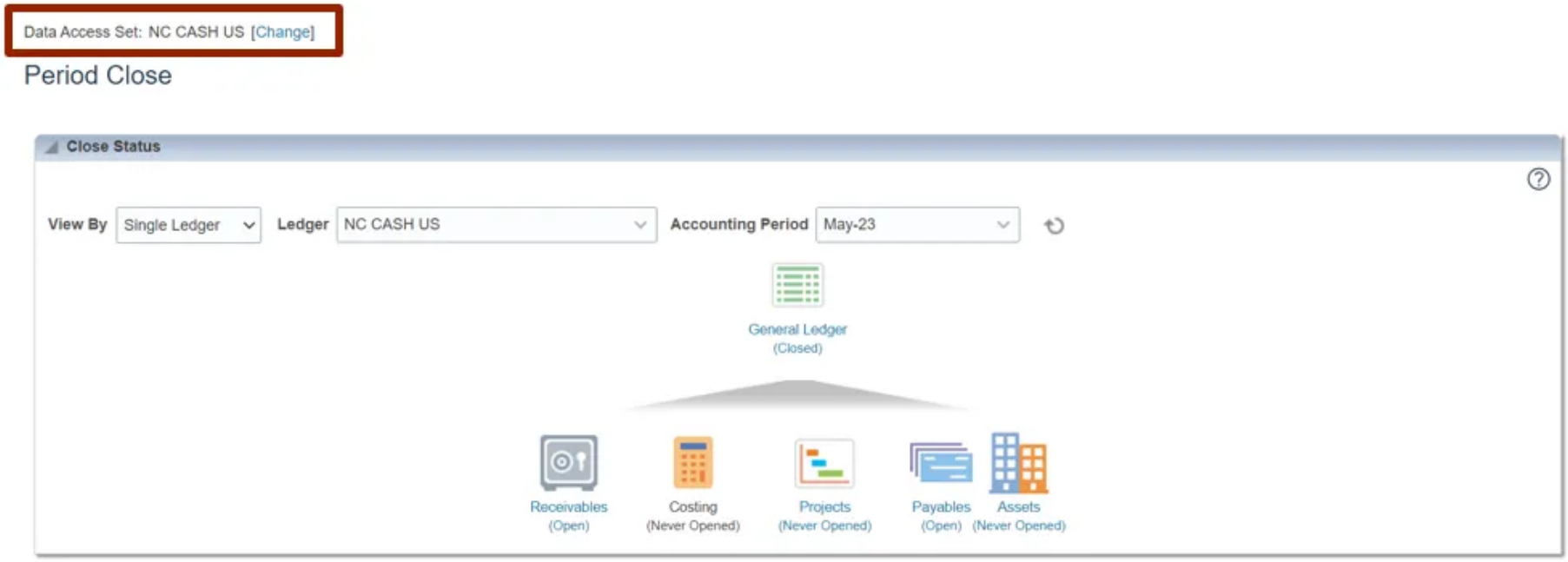
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Step 4. On the **Period Close Dashboard**, click the **Change** button next to **Data Access Set** to change access set. In this example, choose **NC CASH US**.

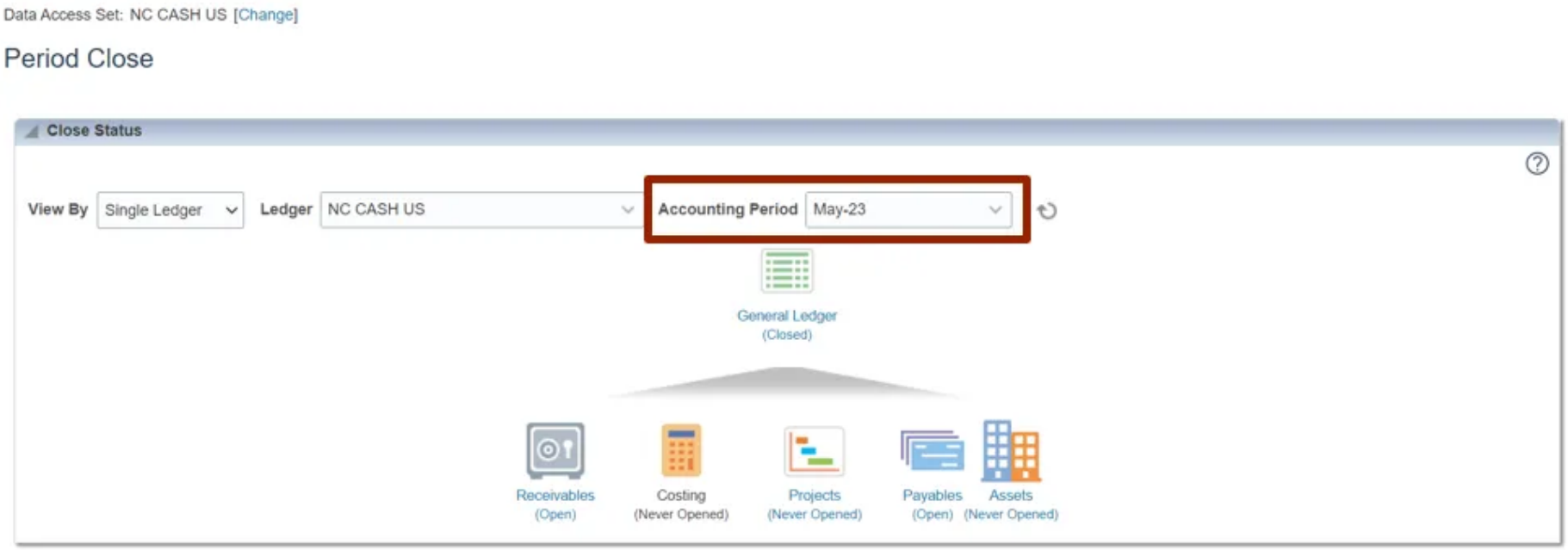
Note: If the data access set is not already selected this is a mandatory step.

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Step 5. Here is the **Period Close Dashboard**. In the ***Close Status*** section, select the desired accounting period from the ***Accounting Period*** drop-down choice list.

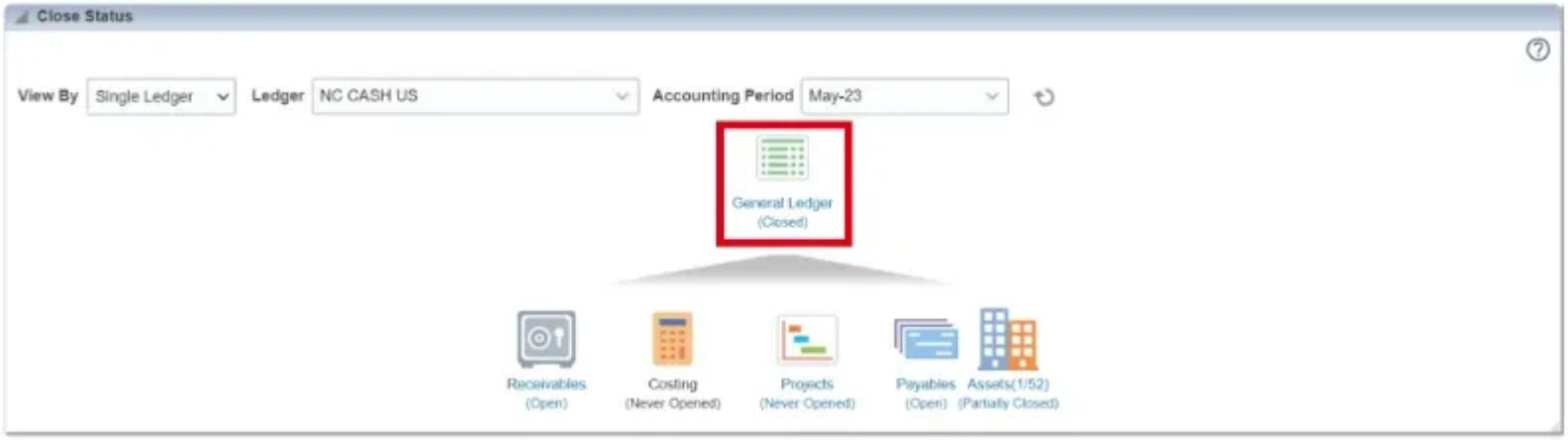
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Step 6. On the **Period Close Dashboard**, the status of the selected Accounting period is displayed.

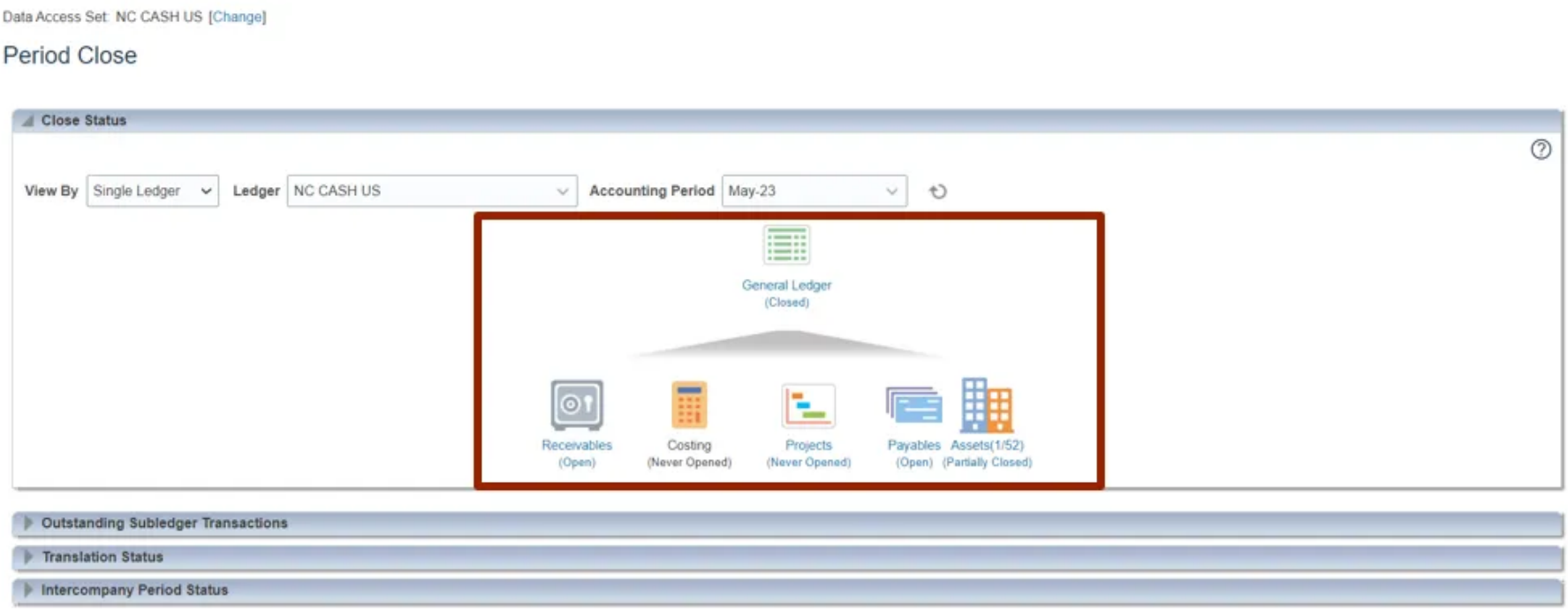
In this example, it is **Closed**.

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Step 7. In the ***Close Status*** section, click on the respective icons to view the period status for each subledger.

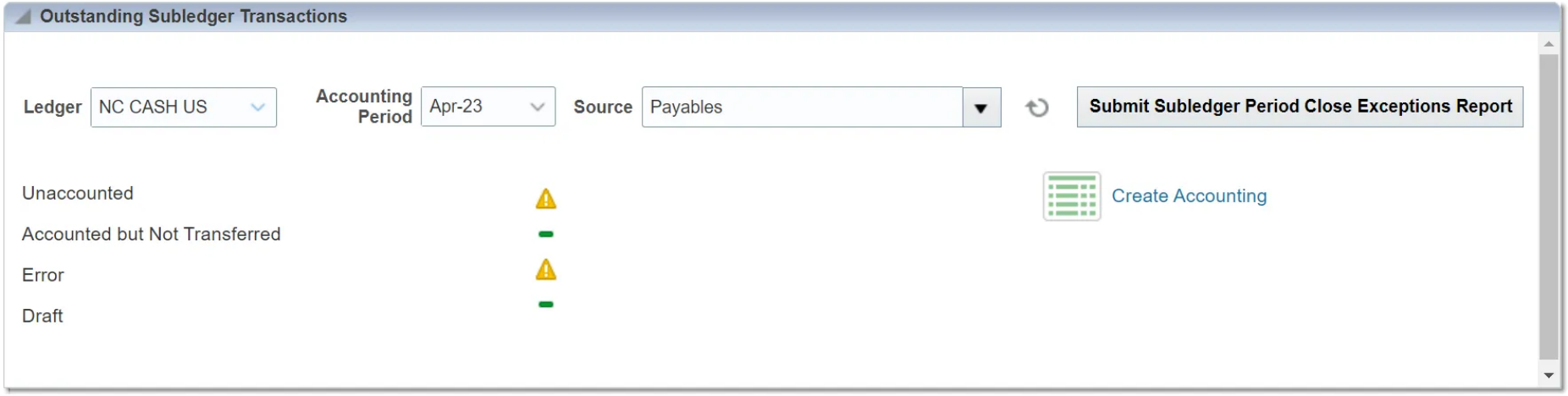
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Note: There are also additional sections in Period Management Dashboard that let you monitor real-time data. Scroll-down on the Period Management Dashboard to see these features,

1) **Outstanding Subledger Transactions** - This will notify you of anything that has errors or is in draft mode, as well as anything that has been accounted for but not transferred to the ledger. Additionally, you may drill further into the transactions listed here to perform any necessary reconciliation or investigation.

Image



2) **Intercompany Period Status** – You can open and close periods by transaction type on the **Intercompany Period Status** page.

Image



Wrap-Up

View the Period Management Dashboard using the steps above to view the period statuses of the general ledger and all subledger modules.

Additional Resources

- Web Based Training (WBT)
  - GL105: GL Period Management

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