CM-18 NCFS Springboard Overview

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to explain the layout and capabilities of the NCFS Springboard in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG provides NCFS) users with an overview of the layout and the capabilities of the NCFS Springboard. After the user navigates from the log in page, the initial page is called the NCFS Home page which houses the NCFS Springboard and is vital to the user experience. The Springboard is a menu delivered with a default set of icons that represent each function, and it provides access to the application work areas. From the home page, users can access action items, tasks, the Springboard which houses process work areas, and the Navigator Menu which houses all the pages to which the user has access.

Key Terms

Key Terms	Description
Home Page	The Home Page is the default landing page in the user interface. Accessed after logging in and via the home icon located at the top of the user page.

Springboard	The Springboard is the grid of process work area icons, which appears on the panel and banner layout of the home page. Use the icons to open the work areas and dashboards to complete tasks.
Navigator Menu	The Navigator Menu displays a list of links that connect to more business process areas.
Favorites and Recent Items	NCFS allows users to quickly access pages that are frequently used. The favorites option allows users to bookmark application pages and use these bookmarks to open pages. The recent items in NCFS allows users to navigate to pages that users have opened recently.
Watchlist	The Watchlist in the global header is used to track key items and open pages where users work on specific items. Users can find the Watchlist icon in the global header only if your administrator has selected the default home page layout as Panel or Banner.
Settings and Actions	Users can use tools from this menu to work with or set up the application. Application Setup includes: • Switch to use the application in another security role if you are authorized to do so • Set user preferences • Show Help Icons: Display all help icons on all pages, wherever available • Sign out
Notification	Notifications are received when there is a pending action that requires attention.

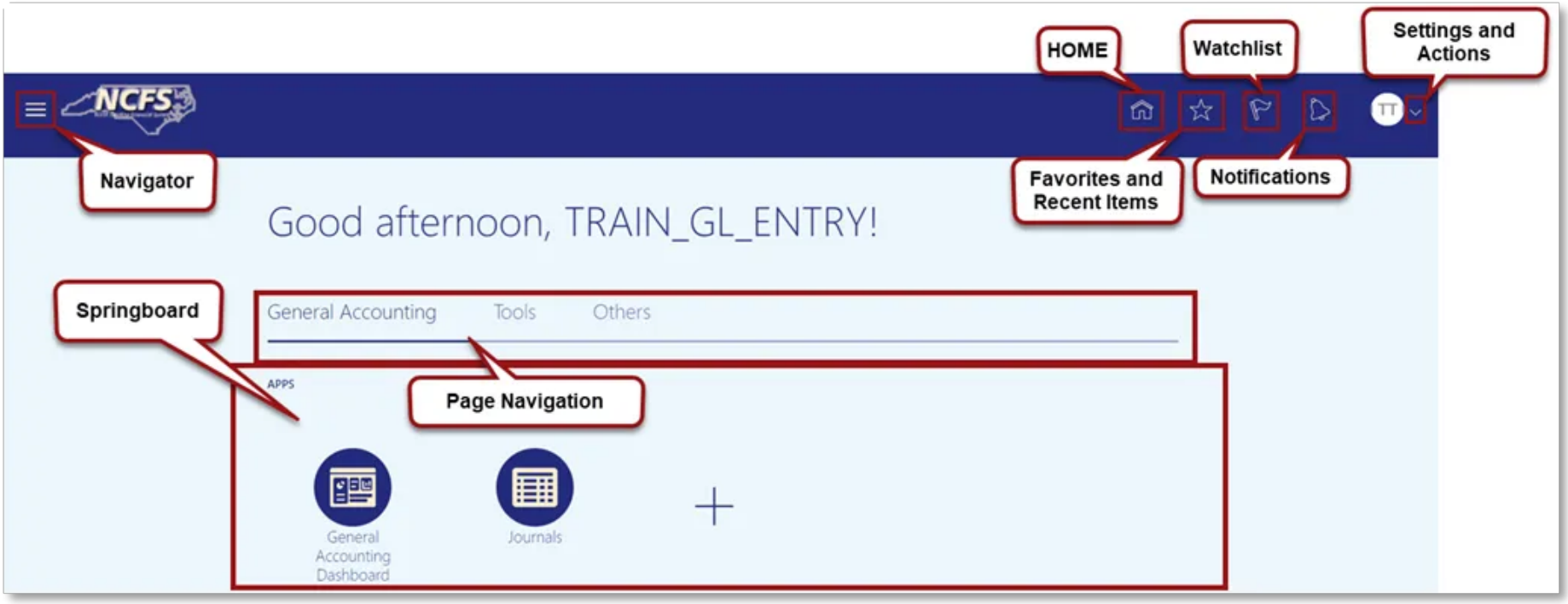
User Tip

All first-time users should ensure at log-in that the browser cache is empty prior to initiating the log-on sequence.

Home Page

The home page is where the user can navigate the entire application. From the home page, users can access actions items, tasks, the Springboard which houses process work areas, and the Navigator Menu which houses all the pages to which the user has access.

Image



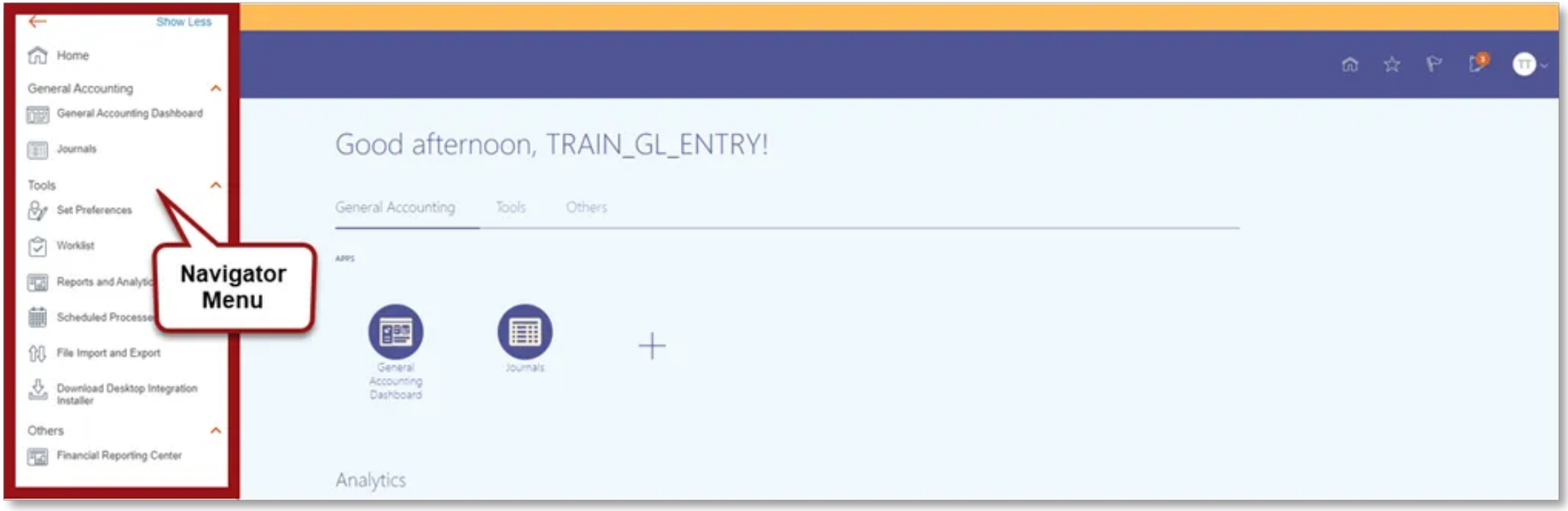
From the home page, users can access actions items, tasks, the Springboard which houses process work areas, and the Navigator Menu which houses all the pages to which the user has access. NCFS provides four main layouts for the home page and determines how the user interface is viewed by the user.

Navigator

The Navigator is the menu that is accessible from throughout the NCFS system. The menu is composed of links (items) that are organized in a hierarchy of groups. The security role the user has dictates the system options in

the navigator menu. The standard user role has access to the specific module they have been provisioned access, the home icon, the tools section, and others section.

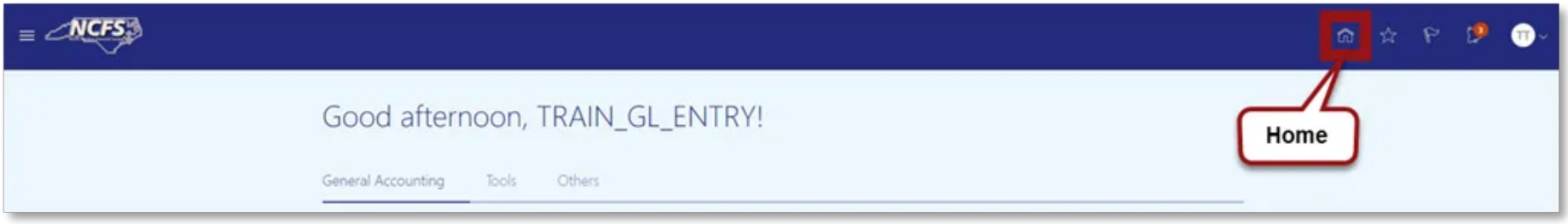
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Home

The Home button allows users to navigate back to the NCFS home page. Users can access this home button from any of the NCFS pages.

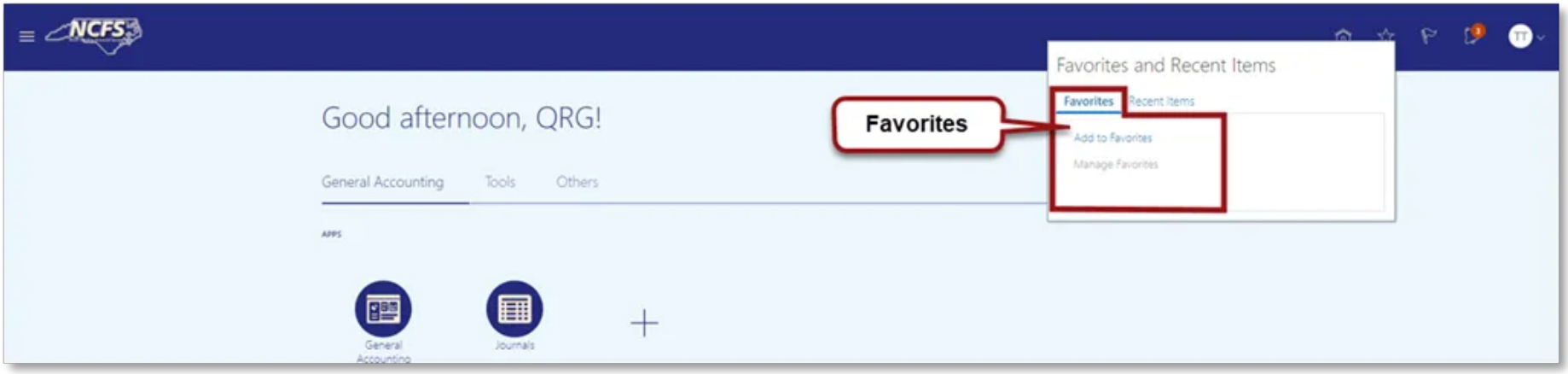
Image



Favorites and Recent Options

Users can favorite pages that they frequent often and navigate more efficiently to recent locations. When users are on a page and want to add that landing page to their favorites, they must select the star icon and then select add to favorites. As shown in the image below, the recent items display the recent navigation location of users. If users log out and then log back in, the recent visited pages still appear.

Image



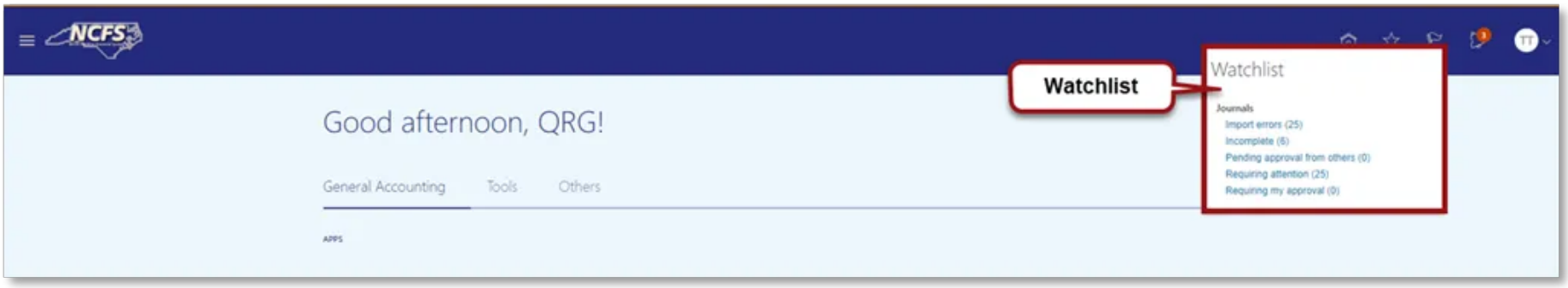
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Watchlist

The Watchlist contains jobs and processes for handling watch list data. This includes downloading, preparing, and exporting the data for use in the screening processes.

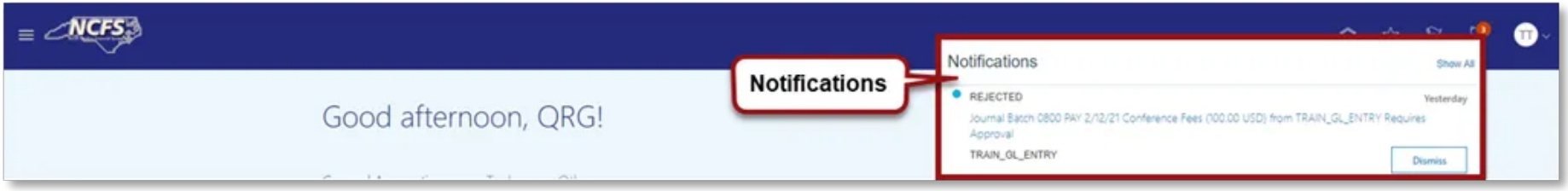
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Notifications

The Bell Notification icon allows users to see the system notifications assigned to their role and profile. For example, a user assigned the journal approval role sees journal entries that are pending approval.

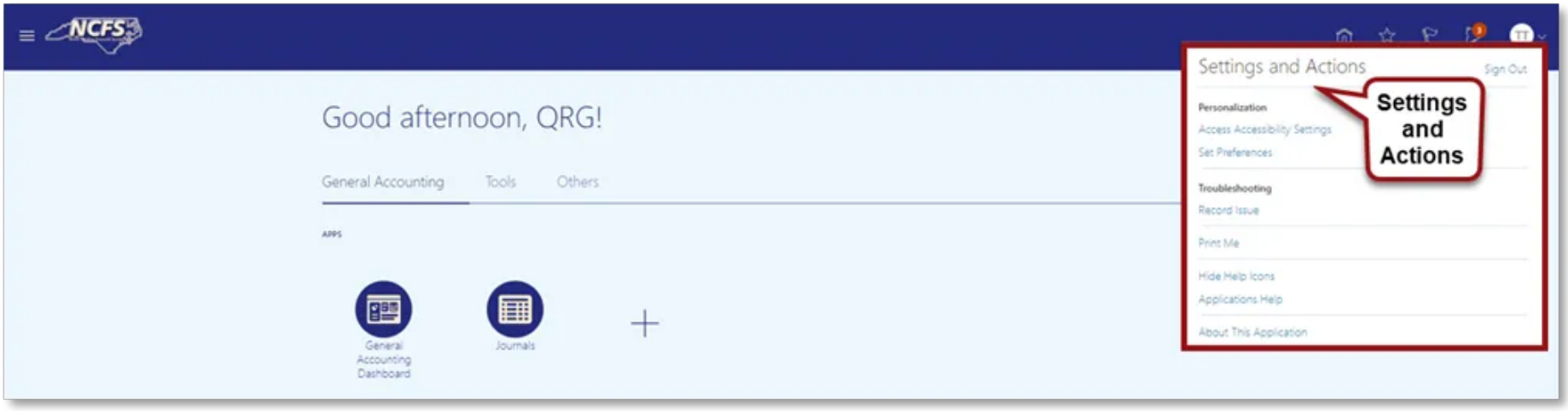
Image



Settings and Actions

This section of NCFS allows users to make updates to their preferences, troubleshooting and to Sign Out. Users can make personalizations to various screens in NCFS. As a part of the troubleshooting functionality users can record the specific issue they are experiencing.

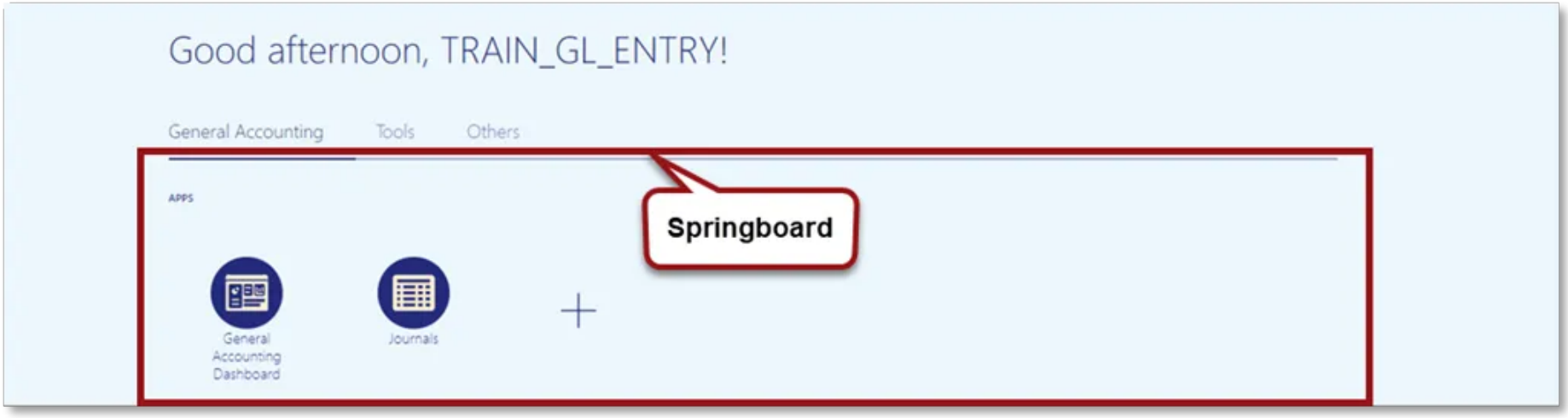
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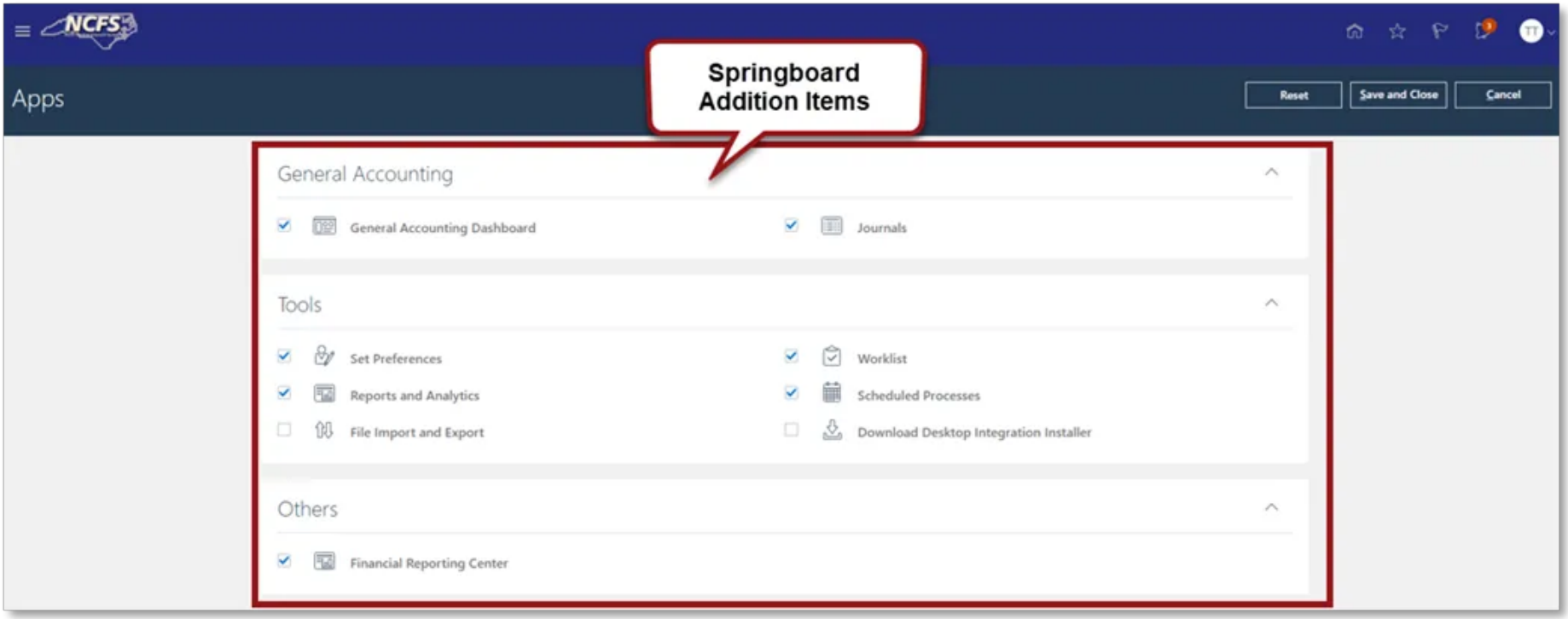
Springboard

The springboard is a menu delivered with a default set of icons that represent various functionality. Users can personalize and customize this to their desired style. The springboard also displays the modules the user has been provisioned. The plus sign in the springboard is the functionality that allows users to make personalizations.

Image



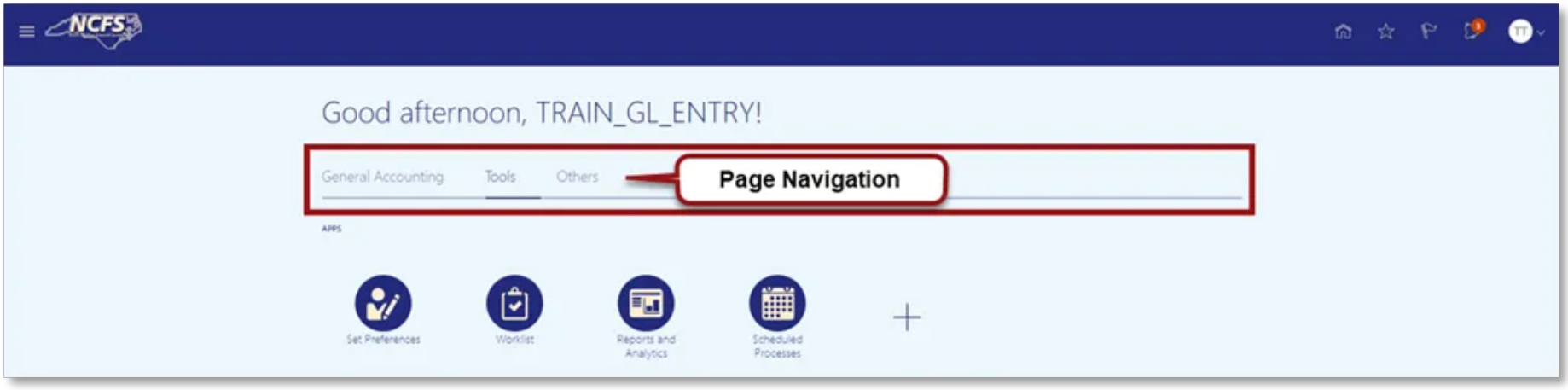
Image



Page Navigation

Users can navigate various applications and tabs which allow users to access the NCFS modules. Users can also access the Reports and Analytics section of NCFS.

Image



Wrap Up

The Home Page and Springboard are the locations in the user interface for the user to manage tasks and navigate within the application. There are user defaults set by the State for end users such as user interface layouts. However, there are opportunities for users to set their own preferences to manage their user experience.

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