

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

Good afternoon, GL PERIOD MANAGEMENT MAIN!

General Accounting

Intercompany Accounting

My Enterprise

Tools

Others

QUICK ACTIONS



Manage Journals



Create Journal



Manage Approvals for Journals



Import Journals

APPS



General
Accounting
Dashboard



Journals



Period Close



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

Image

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Period Close



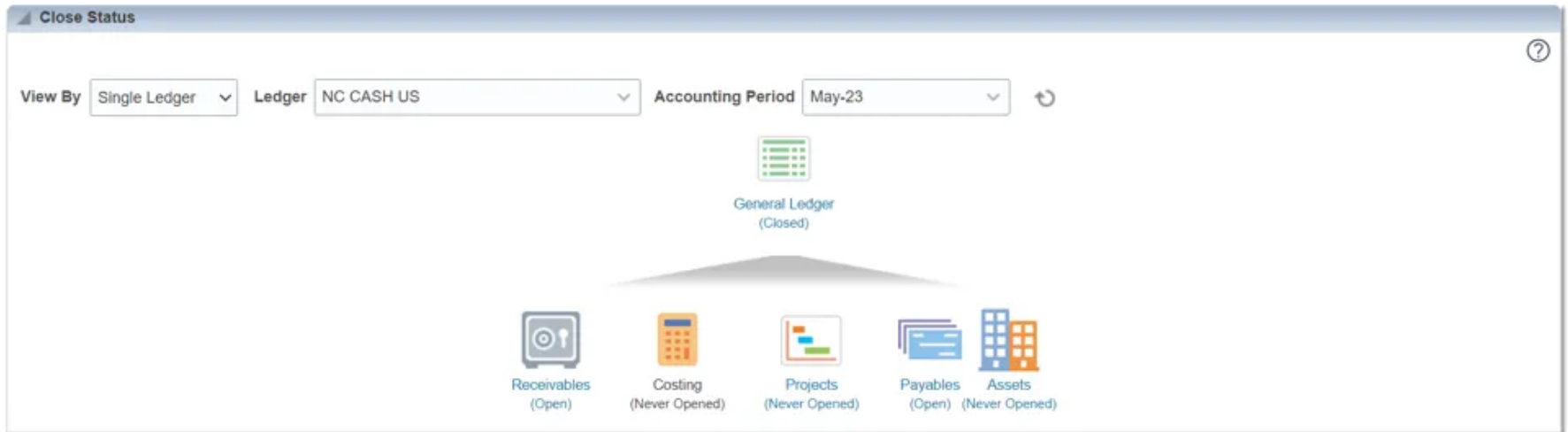
Step 4. On the **Period Close Dashboard**, click the **Change** button next to **Data Access Set** to change access set. In this example, choose **NC CASH US**.

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

Image

Data Access Set: NC CASH US [Change]

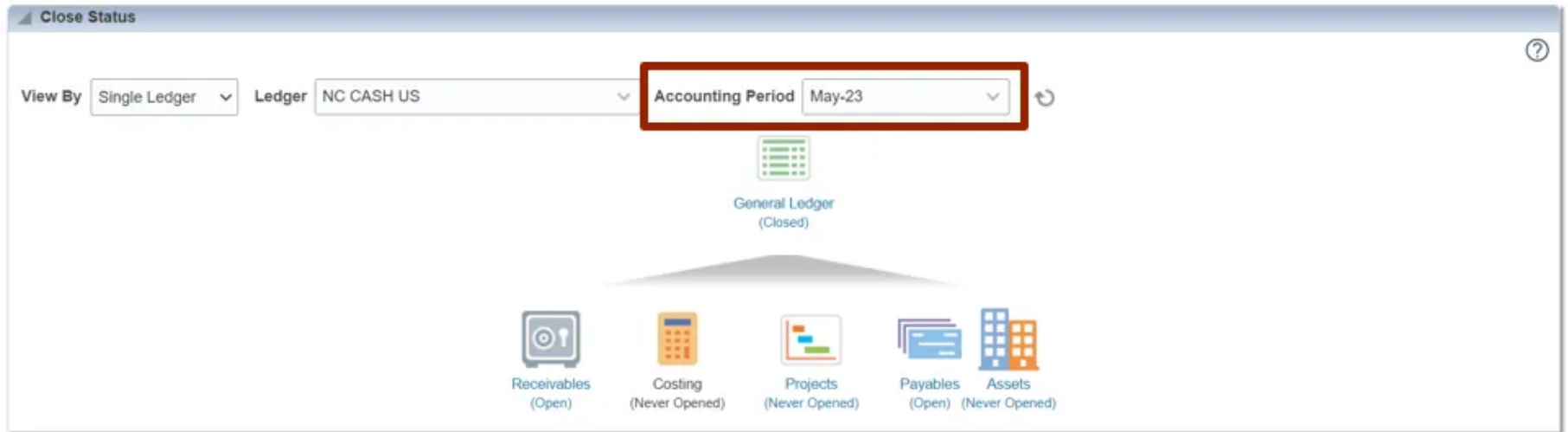
Period Close



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.

Image

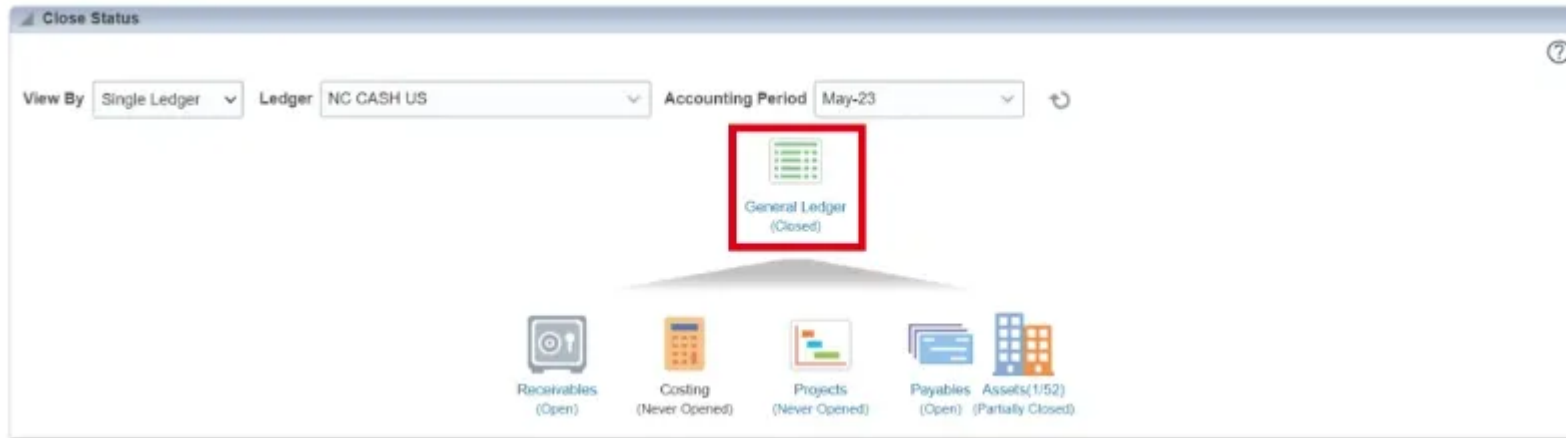
Period Close



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

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

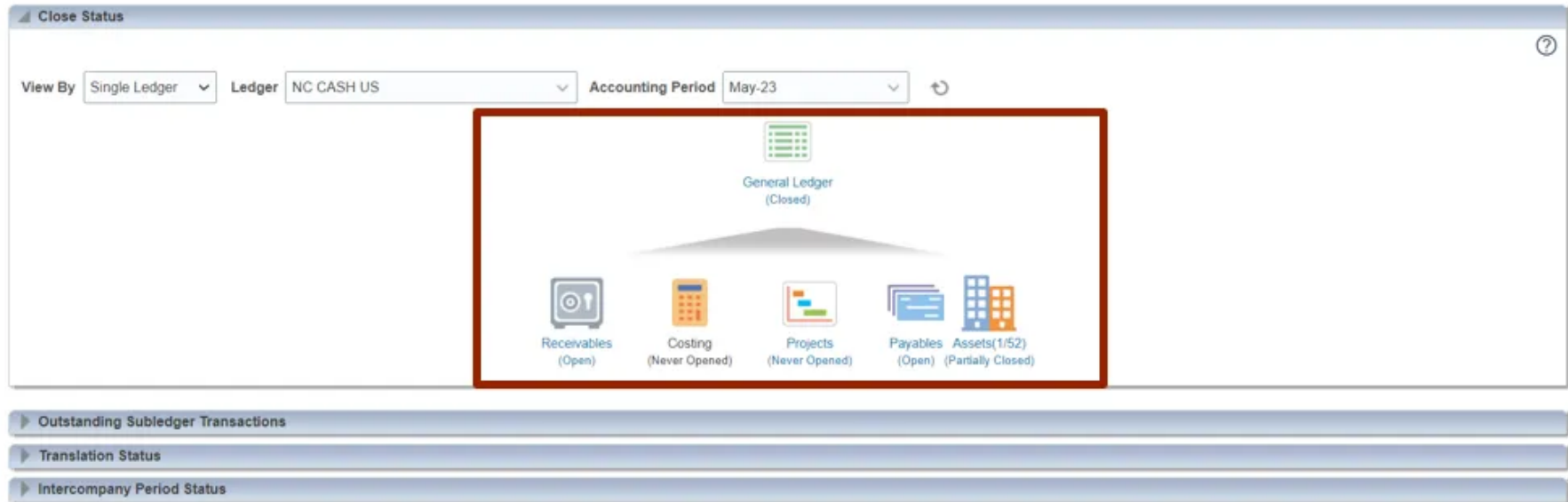
Image



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

Image

Period Close



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.

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Additional Resources

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

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