

Glossary of Terms

- **Account/Advanced Search** A feature that provides NCP Clients with the ability to search for account or job specific information within Portal or the PDF Archive.
- **Client Number** An eight-digit number assigned to a Client by NCP. This number is sometimes referred to as the Client Base Number. It is displayed in the "Logged In As:" section of the Portal header. It is possible for a Client to have more than one Client Number.
- **Client Portal** NCP's Client Portal presents product and service information from various internal sources in a unified way with a consistent look and feel. The primary function of Portal is to deliver both current and historical production information to Clients.
- **Collaboration Service** This Service enables NCP Clients to transmit and receive information to/from NCP. Features included in the service are:

 - Artwork Exchange Provides Clients with the ability to upload and download artwork, graphics, images, etc.
 - Production Data Upload Provides Clients with the ability to upload and download production data files on an as needed basis.
 - Project Information Provides Clients with the ability to upload and download project related information.
 - Test Data Upload Provides Clients with the ability to upload test data files on an as needed basis.
 - My Documents Provides a secure location for internal and external Users to easily upload and manage documents, presentations and spreadsheets associated with or directly related to a specific account.
- **Company Administrator** A Client representative responsible for administering/managing User accounts and User access in Portal.
- **Client Manager** NCP employee assigned to manage Client accounts. Client Managers communicate with Company Administrators regarding Portal setup and configuration.
- **Dashboard Service** Portal's main Service that allows the User to easily view key information related to their account, job, and production status through the following Portlets:

 - Jobs Completed Portlet Contains the Jobs that are complete and have been picked up by the USPS, FedEx, or another carrier for shipment.
 - Jobs In Production Portlet Contains Jobs that are currently considered as "work in progress."
 - Files Received Portlet Contains files that have been transmitted by a Client to NCP and have been received for processing at one of NCP's locations.
- **Document Archives** An interface that enables Users to perform Standard or Advanced Searches of archived documents, save and reuse search results, and manage one-or-many PFDs in a single view.

- **Drop Date** Date that a Job is to be completed and mailed.
- **EBP** Electronic Bill Presentment (EBP) is a process that enables documents to be delivered electronically.
- **ERR** Electronic Return Receipt (ERR) is a Service offered by the USPS that provides electronic proof of delivery for Certified Mail.
- **Fax PDF** The Fax PDF Service enables clients to fax images that are stored within the archive directly to a specified fax number.
- **Files Sent Service** This Service provides information on files sent to Clients from NCP (Example: Single Statement PDFs). These files can be directly uploaded into a Client’s Archiving System.
- **Flex Fields** Flex Fields provide the ability for NCP to define up to six custom fields (at the Account level) from a Client’s data stream that will be available in Portal for reporting purposes. Letter codes, statement type, branch codes, institution types, and other data fields can be available for reporting. NOTE: Consultation with the Client and a small, one-time setup fee will apply.
- **Inventory Service** A Service that enables NCP Clients to access inventory stock levels for both Client-supplied and NCP-supplied inventory items. This service includes online PDF viewing of inventory items. NOTE: NCP suggests that this Service be limited to Users with a specific need.
- **Invoices Service** This Service provides a link to view invoice details and the ability to view and/or print a PDF or MS Excel spreadsheet of specific invoices.
- **Job ID** A six-digit number assigned to a data file or group of files that is used to track work in progress. Job numbers and Tracking IDs are the key identifiers used by NCP to manage its workflow.
- **Mail Tracking Service** A central location for clients to access production data linked to the following USPS mail services to which it is subscribed:
 - Origin Tracks mailpieces placed into the mailstream by the borrower. Typically, this will be payments being sent to a lockbox.
 - Destination Tracks mailpieces mailed from NCP to the borrower.
 - Lockbox Auditing Provides a means for an NCP Client to monitor the timeliness of their lockbox provider to post a payment. Origin Mail Tracking is a pre-requisite for this service.
- **Online View** This Service allows Users to view **AND** print archived PDF documents throughout Portal.
- **Online View – Disable Print** This Service provides Users with a “View Only” capability of archived PDF documents within Portal.

- **Option / Option Number** This is an eight-digit number that defines a variation or version of a Product (at a more granular level). Option Numbers are assigned when the physical components of a given Product are the same, however, the message content differs. For example, a Product that contains a one-page simplex letter, #10 mailer envelope, but no return envelope may have Option 12345678 to indicate Collection Letter and an Option Number 87654321 for Post-Repo Letter. In either case, the components of each letter are the same, however, the message content varies. Please note that Option Numbers are unique to the associated Product.
- **Portlet** Modules within Portal that serve a specific function or provide certain information. For example, the Dashboard contains three Portlets: Files Received, Jobs in Production, and Jobs Completed. All Portlets contain Data Headers (column titles). Data can be sorted by clicking on a Data Header.
- **Product** The finished physical item that is produced and sent to the mailstream for a Client. If the physical components change, then a new Product Number is required. Examples of Product Numbers are:
 - (9VAN0) Two-Page Statement
 - (1S307) Coupon Book
- **Pulls – Pull & Approve** A Service that provides NCP Clients with the ability to Pull (remove) individual Accounts from a Job prior to release for print production or archive. The Account Pulls Service is only available to Users with access to the Review and Release Service (defined below).
- **Received Date** Date that NCP received a file from a Client for processing.
- **Reporting Service** This Service provides access to numerous pre-configured Standard reports.
- **Reporting Service/Ad Hoc** The **Ad-Hoc Query and Report Builder** utilizes Oracle Discoverer Plus and provides the User with the ability to create their own customizable reports to suit their needs.
- **Require IP Validation** The IP Validation Service requires Clients to provide NCP with specific IP addresses for networks they wish to have the ability to access Portal. Once IP Validation is turned on, only networks with authorized IP addresses will be granted access to Portal.
- **Review and Release**
 - R&R Configure Provides the ability to modify the Review and Release configuration settings.

– R&R Take Action

Provides the ability to access and view jobs through the Jobs Pending and Jobs Completed Portlets. Users can Approve (release) jobs for production, place jobs on Hold or Re-Sample jobs through the Jobs Pending Portlet.

■ **Scheduled Drop Date**

Date that a Job is scheduled to be completed and/or mailed.

■ **Tracking ID**

A unique identifier that is assigned to each file received by NCP.

■ **View Change History**

This Service provides the ability to view changes made by a User.

– Admin

Provides the Client Administrator with full search capability and the ability to view Change History log information for ALL Portal Users. Search criteria include: Data Storage, Beginning Date, Ending Date, User and Org ID.

– Limited

Provides Users with the ability to view their own Change History log for a rolling six-month period.

– Standard

Provides Users with the ability to view Change History information of ALL Users for a rolling one-year period.

■ **View Event History**

This Service provides access to view noteworthy events associated with User activities.

– Admin

Provides the Client Administrator with the full search capability and the ability to view Event History log information for any Portal User. Search criteria include: Data Storage, Beginning Date, Ending Date, User and Org ID.

– Limited

Provides Users with the ability to view ONLY their own Event History log for a rolling six-month period.

– Standard

Provides Users with the ability to view Event History information of ALL Users for a rolling one-year period.

■ **View Notes History**

This Service provides the ability to view Notes within various Portlets in Portal.

– Admin

Provides the Client Administrator with the full search capability and the ability to view Notes History log information for any Portal User. Search criteria include: Data Storage, Beginning Date, Ending Date, User and Org ID.

– Limited

Provides Users with the ability to view their own Notes History log for a rolling six-month period.

– Standard

Provides Users with the ability to view Notes History information of ALL Users for a rolling one-year period.