NCP SOLUTIONS™
AN OSG COMPANY

portal | User Guide

Release 1.95

Portal User Experience
Release 1.95 v.1
04/23/2020
Intended Audience: NCP Clients

Notice

Information contained within this guide is for training purposes only. All names, account numbers, etc., referenced in this document are fictitious. Any resemblance or similarity to persons living or dead is coincidental.

TABLE OF CONTENTS

Introduction 1
Supported Browsers 2
Glossary of Terms 4
Services and Features 8
Getting Started 9
Portal Header 10
Version Release Notes 10
Login Information 11
Global Links and Search Area 12
Standard Search 12
Standard Search (Document Archives) 13
Standard Search (Production Portal) 13
Advanced Search (Production Portal) 14
PDF Fax Service 16
Document Archives 18
Advanced Search (Document Archives) – Key Features and Functions 19
Custom Searches 19
Wildcards 19
Recent Searches 19
Favorite Searches 19
Document Collections 19
Results Configuration 19
Authorized Viewing 19
Product-specific Configuration 19
Advanced Search Overview 20
Searchable Indexes 20
Using Wildcards in an Advanced Search 20
Search History / Reusability 21
Search Results 23
Selecting and Viewing Documents 24
Viewing Job Details 24
Main Services Toolbar 25

Portlet Attributes 25
My List (Client List) 26
Dashboard 27
Files Received Portlet 28
Account Details Portlet 32
Electronic Return Receipt 33
Jobs in Production Portlet 35
Jobs Completed Portlet 37
Reporting 40
Refresh Reporting Portlet 41
Standard Reports 45
Administration Reporting 46
User Usage 46
User Usage Details 47
Roles 48
EBP Email Notification Reporting 49
EBP Registration Reporting 49
Inventory Reporting 50
Inventory Usage Report 50
Job Metrics Reporting 52
Monthly Job Metrics Report 52
Quarterly Job Metrics Report 54
Job Summary Reporting 55
Files Received Report 55
Jobs In Production Report 56
Jobs Completed Report 57
Job Details Report 58
Rejects Report 59
Master Data Reporting 60
Product Details Report 60
Job Summary Pulls Reports 61
Account Details Pulls Reports 62
Invoices 63
Inventory 64

NCP Supplied Stock 65
Client Supplied Stock 66
Review and Release - Overview 67
Review and Release - Email Notifications 67
Review and Release - Setup 68
Review and Release - Configuration 71
Specific Products 73
Specific Options 74
Resetting to Default 74
Upload Sample Account List 75
Upload a Sample File 76
Review and Release - Managing Jobs 79
Jobs Pending Review and Release Portlet 80
Job Approval 81
Review and Release Job History Portlet History Portlet 82
Jobs on Hold 83
Placing a Job on Hold 84
Re-Sampling a Job 86
Job History 88
Account Pulls - Overview 89
Jobs Available for Pulls Portlet 90
Account Pulls Review and Release Portlet 91
Account Pulls History Portlet 92
Account Pulls – Pulling Accounts 93
Upload Accounts Overview 93
How to Upload Accounts 94
Flagging ALL Accounts for Pulls 97
Flagging Individual Accounts for Pulls 100
Flagging Accounts by Search Values 103
Approving Account Pulls 105
Flagging Account Pulls Through Review and Release 107
Flagging All Accounts for Products/Options Through Review and Release 109
Releasing a Job with Pulled Accounts 112
Add Note Feature (Included in Account Pulls Service and Inventory Service) 113

Collaboration 116
Overview 116
Data Exchange 116
File Manager 117
User Event History 118
Data Locations and Business Rules 119
Mail Tracking 124
Origin Reports 125
Destination Reports 128
Lockbox Auditing 129
Files Sent 133
System Auditing 134
Appendix A – Login Errors 137

Introduction

This guide describes how to access and use Portal, NCP's customer information system. This guide does not describe nor provide instruction on the administration of the site. For information about administration and configuration, please refer to the **Client Administrator Guide**.

For the latest information about Portal, see the Release Notes on Portal's website at https://nova.ncpsolutions.com.

Intended Audience

This guide is intended for Portal Users. To use this guide effectively, you should be familiar with Windows desktop operating systems and Internet Explorer web browser.

Conventions

Conventions used in this manual are shown in the table below:

boldface	Indicates a Service, Portlet contained within that Service, Module, or Data Header
italic	Indicates text that Users should type or input
" "	Quotations indicate system generated messages
underlined	Indicates a hyperlink, icon, button or selection that can be clicked

Portal represents the next generation of Client information access and control. Portal has been designed to provide ease of use and accessibility to information in order to help streamline the production process and improve the Client experience.

Supported Browsers

Portal supports the following browsers/environments and has been tested for a minimum screen resolution of 1024 x 768 with a recommended resolution of 1280 x 1024 or higher. Portal is certified to run on:

- Mozilla Firefox 22.0
- Microsoft Internet Explorer (IE) 8, 9, 10 and 11
  (Note: Portal's Document Archives Search feature requires Compatibility View setting for IE 11)

Attempting to run Portal on older or newer versions of Internet Explorer will prompt the following error:

Portal also has the following JAVA requirement:
- Sun Java Runtime Environment (JRE) 1.6.0, patch set 16 or greater

Portal Key Features

- **Next Generation Client Portal**
  - Presents enterprise information from diverse sources
  - Provides access control to multiple applications and databases
- **Performance**
  - System built on Oracle Fusion Middleware and Portal technology
  - New architecture is scalable to current and future business needs
- **Client Control**
  - Client Administrators can control User access
  - User administration is Role-based making User management much simpler
- **Integration**
  - Multi-division support
  - Access to all NCP Systems via Reporting module
  - Consistent look and feel

- **Company Priority**
  - Full time development team
  - Multiple releases planned for the next two years
- **Provided as a Value-Added Service**
  - Standard features and functionality are available to all Clients
  - Advanced features additional
    - Mail Tracking, Review and Release, Account Pulls, PDF Fax and EBP Management, etc.

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** — A fully configurable service that provides NCP Clients with immediate online access to statements, invoices or other letter-type production files for review and approval prior to production 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.

Services and Features

Standard Services and Features are made available to all NCP clients. User access to Standard Services and Features is role-based and granted by the Administrator. The Standard Services and Features are described as follows:

Service or Feature	Capability Overview
Account Search/Advanced Search	Perform standard account search of production Portal, or advanced search using a variety of criteria including account holder name, print/mail date, wildcard characters.
Collaboration Service	Exchange artwork, production data, project information, test data with NCP.
Files Sent Service	Reconcile files received from NCP tied to Job ID and original submission method.
Inventory Service	Manage custom stock items with access to quantities, usage reporting and item details.
Invoices Service	Retrieve and reconcile invoices linked directly to production data. Provides access to 13 month rolling history.
My List	Access child companies associated with a parent company.
Production Dashboard	Monitor workflow with access to Files Received, Jobs in Production and Jobs Completed Portlets.
Reporting Service	Gather critical production data to audit performance metrics.
View Change History	Provides access to view changes made by a user. Offers standard, limited, admin rights.
View Event History	Provides access to view user activities. Offers standard, limited, admin rights.
View Notes History	Provides access to view notes created by a user. Offers standard, limited, admin rights.

Enhanced Services and Features are optional and are made available based on client needs. Many of these Services and Features require special setups and are associated with recurring fees. User access is also role-based.

Service or Feature	Capability Overview
Account Pulls Service ($)	Remove accounts from a job prior to production or archive. (Review and Release is a prerequisite for Account Pulls Service)
Custom Reporting ($)	Reports built by NCP (using Ad-Hoc Reporting) to meet client specifications.
Document Archives ($)	Perform quick or advanced searches of archived documents, save and reuse search results, create favorites for recurring searches, manage document collections. (Online View is a prerequisite for Document Archives.)
EBP Management ($)	Create, manage and distribute communications triggered by ePresentment enrollments. (ePresentment is a prerequisite for EBP Management)
Mail Tracking Service ($)	View USPS® mail deliverability information.
PDF Online View ($)	View PDF images of account holder statements linked to production data.
PDF Fax ($)	Transmit PDF documents from Portal to a fax number. (Online View is a prerequisite for PDF Fax.)
Review and Release Service ($)	Sample, proof and approve PDF images of statements prior to production release.

($) **Denotes Fee-based Service or Feature**

Getting Started

Access **NCP's Portal Site:** ***https://nova.ncpsolutions.com***

Portal Login Screen

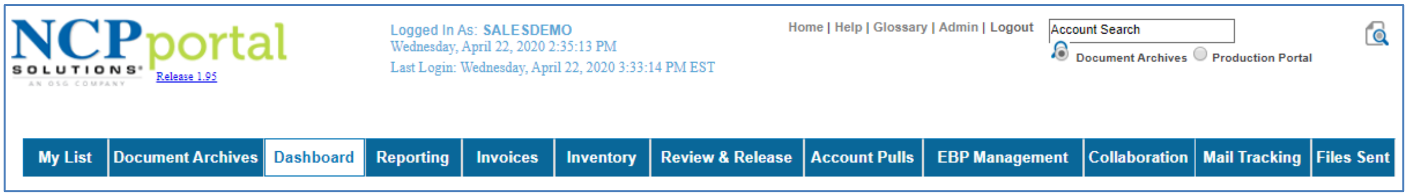
Enter the *login name* and *password* that were provided to you by your Company Administrator. Login name is NOT case sensitive. Passwords ARE case sensitive.

Click Submit

Login Errors

Please see Appendix A located at the end of this document for all potential Login Errors and Corrections. Most login failures require a reset of the User account password by the Company Administrator.

Portal Header



Portal Header

Portal Headers are displayed at the top of every page and contain the following information or functions:

- Release Notes
- Login Information
- Global Icons
- Search & Advanced Search
- Main Services Toolbar

Header Release Notes and User Login Information

Version Release Notes

Portal Release Notes contain information describing the latest features available within Portal as well as other up-to-date information that supplements the main system documentation. The Release Notes are available as a PDF document to all Users. Click the Release 1.95 hyperlink beneath the NCP Portal logo to view the latest Release Notes.

Login Information

The Login Information section provides the User with the date and time that the session began along with the Login Username and the Client #- Client Name being accessed. The login date and time are also used to track events and update logging that occurs within the system.

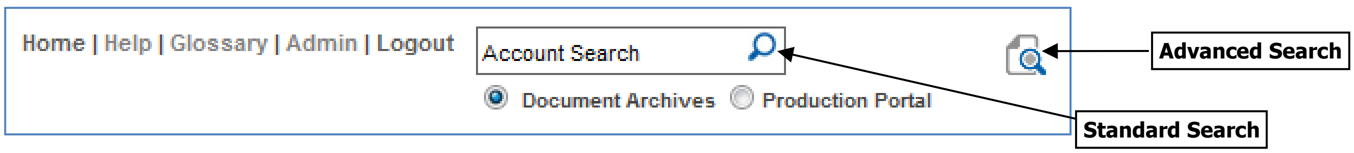
New Users are set up by the Company Administrator. An initial password is automatically assigned and will be emailed to the new User. When a new User logs in for the first time, they will be prompted to change their password.

NCP adheres to industry best practices with password specifications. “Strong” passwords are enforced. Specifications include:

- Minimum number of characters = seven
- Password must contain at least one number
- Password must contain at least one special character
- Passwords expire every 90 days
- Past six passwords cannot be reused

Global Links and Search Area

The Global Links and Search area of the header provide the most commonly used shortcuts as well as powerful search capabilities to quickly locate information contained within Portal and PDF Archive data warehouses.



Home: Returns the User to the Portal home page

Help: Provides access to the User Guide

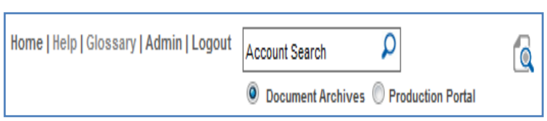
Glossary: Provides a Glossary of common Portal terms

Admin: Provides access to the Administration Portlet

Logout: Ends the session and logs the User out of the system

Standard Search

Portal contains search tools that provide access to two data warehouses:



- Document Archives Data Warehouse
- Production Portal Data Warehouse

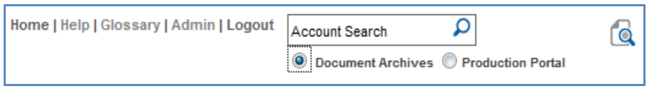
Radio buttons control which data warehouse is searched.

Clients who subscribe to **PDF Archive Services** may access PDF images stored within this archive when the Document Archives radio button is selected (default). PDF images can be made available online from months to years based on client requirements.

Portal's data warehouse contains the information that the User views when navigating through Portal and is searchable when the Production Portal radio button is selected. User access is controlled by the Client Administrator.

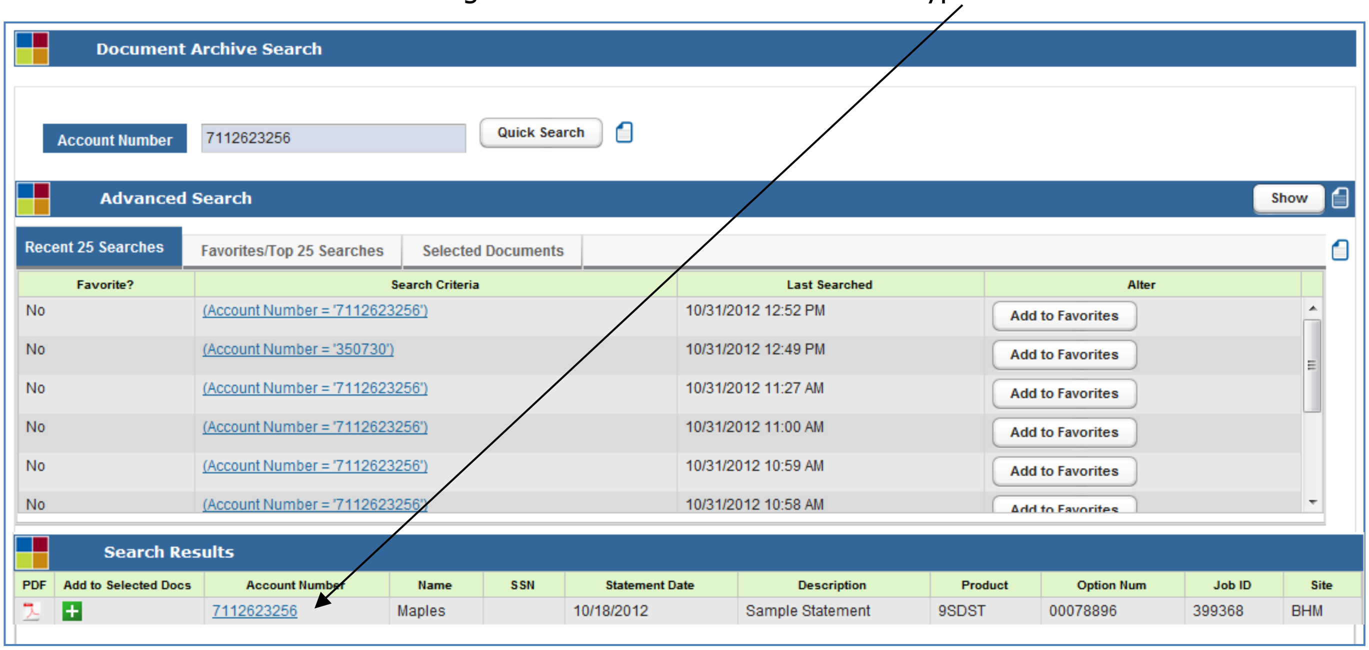
The search capabilities of both the Document Archives and Production Portal data warehouses can provide access to data beyond that which is stored in Portal's web pages based on client requirements.

Standard Search (Document Archives)



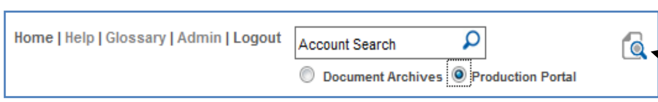
Enter an *Account #* in the Standard Search box and click the magnifying glass icon to search for records contained within the Document Archives data warehouse.

Matching records will be displayed within the **Search Results** Portlet. An image of the account document can be viewed by clicking the PDF icon. Job Details associated with the account are retained for a period of six months and are accessible during this time via **Account Number** hyperlinks.



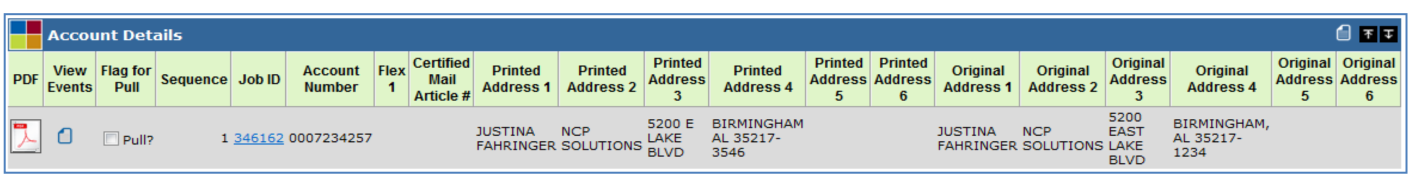
Document Archives Standard Search Results

Standard Search (Production Portal)



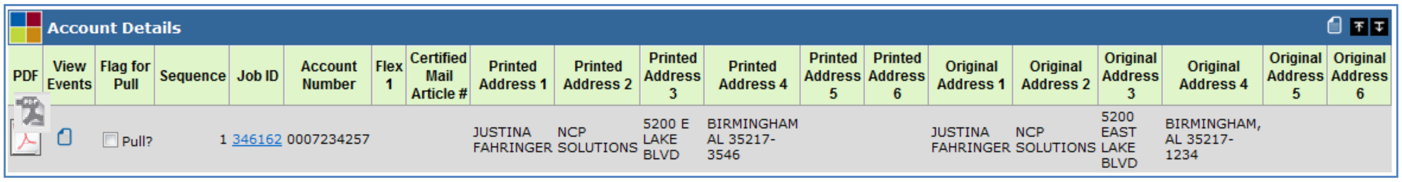
Enter an *Account #* in the Standard Search box and click the magnifying glass icon to search for records contained within the Production Portal data warehouse.

Records that have been processed and stored within the past six months will be displayed within the **Account Details** Portlet. Clients who subscribe to Archive services will also have access to PDF images of stored records for the time period specified in the service agreement.



Production Portal Standard Search Results

A grayed-out PDF icon will be displayed if the record has not completed the internal image generation process.

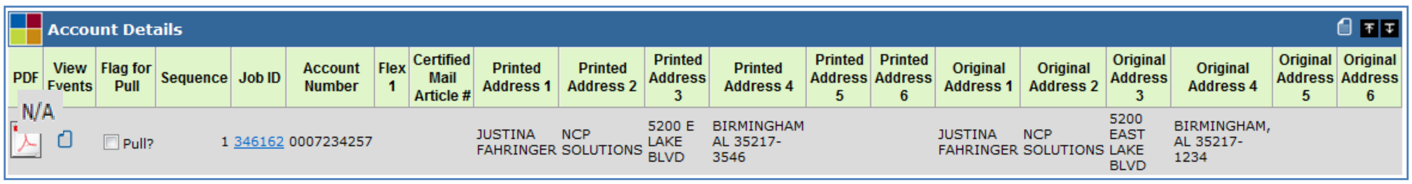


Account Details

PDF	View Events	Flag for Pull	Sequence	Job ID	Account Number	Flex 1	Certified Mail Article #	Printed Address 1	Printed Address 2	Printed Address 3	Printed Address 4	Printed Address 5	Printed Address 6	Original Address 1	Original Address 2	Original Address 3	Original Address 4	Original Address 5	Original Address 6
		Pull?	1	346162	0007234257			JUSTINA FAHRINGER	NCP SOLUTIONS	5200 E LAKE BLVD	BIRMINGHAM AL 35217-3546			JUSTINA FAHRINGER	NCP SOLUTIONS	5200 EAST LAKE BLVD	BIRMINGHAM, AL 35217-1234		

Production Portal Standard Search Results

N/A will be displayed under the PDF Data Header if the User has not been granted access to the **Online View** Service.



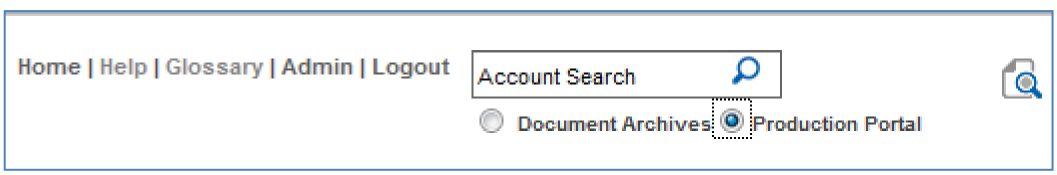
Account Details

PDF	View Events	Flag for Pull	Sequence	Job ID	Account Number	Flex 1	Certified Mail Article #	Printed Address 1	Printed Address 2	Printed Address 3	Printed Address 4	Printed Address 5	Printed Address 6	Original Address 1	Original Address 2	Original Address 3	Original Address 4	Original Address 5	Original Address 6
N/A		Pull?	1	346162	0007234257			JUSTINA FAHRINGER	NCP SOLUTIONS	5200 E LAKE BLVD	BIRMINGHAM AL 35217-3546			JUSTINA FAHRINGER	NCP SOLUTIONS	5200 EAST LAKE BLVD	BIRMINGHAM, AL 35217-1234		

Production Portal Standard Search Results

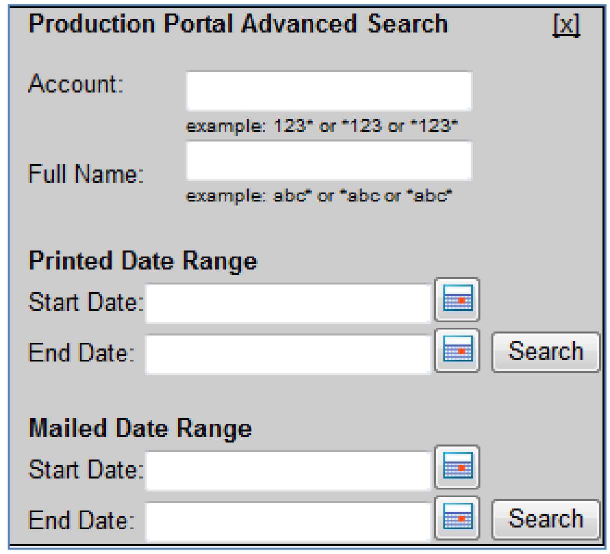
Advanced Search (Production Portal)

Additional search capabilities of the **Production Portal** are available through the **Advanced Search** link. To perform an **Advanced Search**, select the Production Portal radio button, the click the Advanced Search icon.



The **Advanced Search** interface opens, allowing Users to search a variety of criteria including:

- Account Number
- Full Name
- Printed Date Range
- Mailed Date Range
- Wildcard Characters



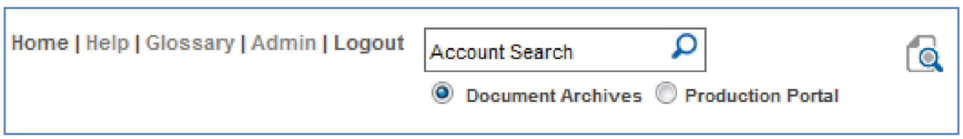
PDF Fax Service

PDF images stored within the PDF Archive can be faxed directly to a specified fax number. The **PDF Fax** Service is a flat rate, fee-based service that is billed on a monthly basis. To subscribe to this service, please contact your NCP Client Manager.

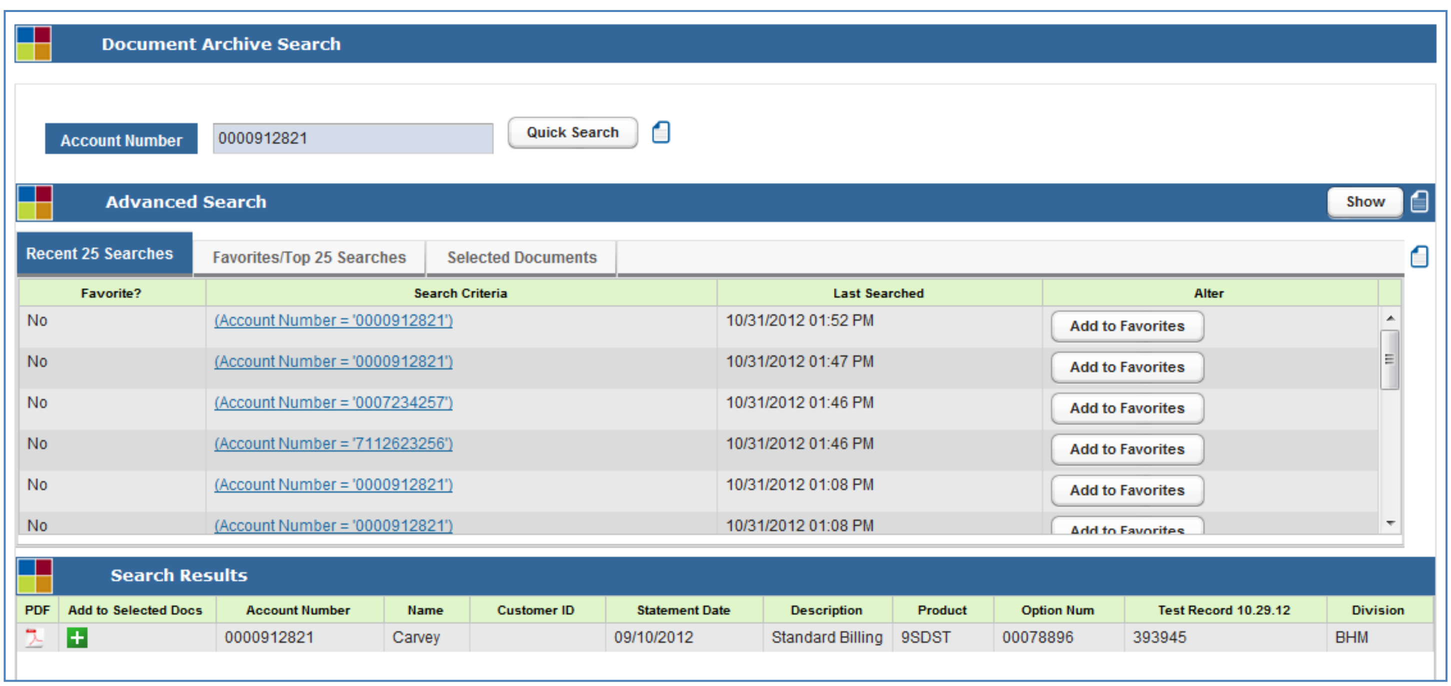
If a Client subscribes to the **PDF Fax** Service, Users have the ability to fax any active PDF document found in any Portlet throughout Portal.

There are many ways Users can access PDF documents. The steps below utilize a common method of searching the Document Archives.

To fax a PDF using the Document Archives Search feature:



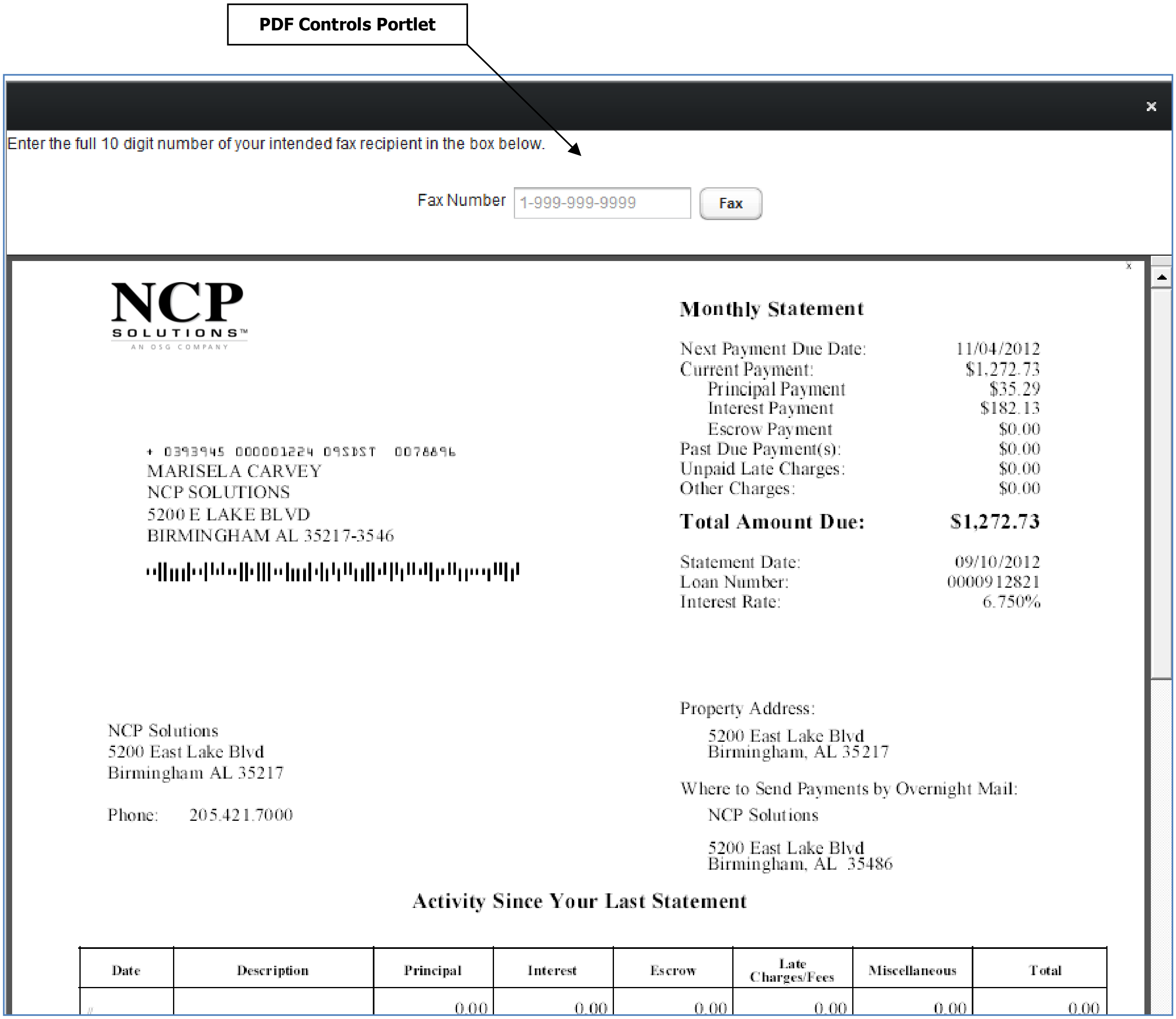
1. Document Archives radio button must be selected (default)
2. Enter an *Account #* in the search box
3. Click the Standard Search icon
4. Results are returned in the **Search Results** Portlet



Document Archives Standard Search Results

5. Click the PDF icon

PDF Fax Service (continued)
============================



PDF Controls Portlet

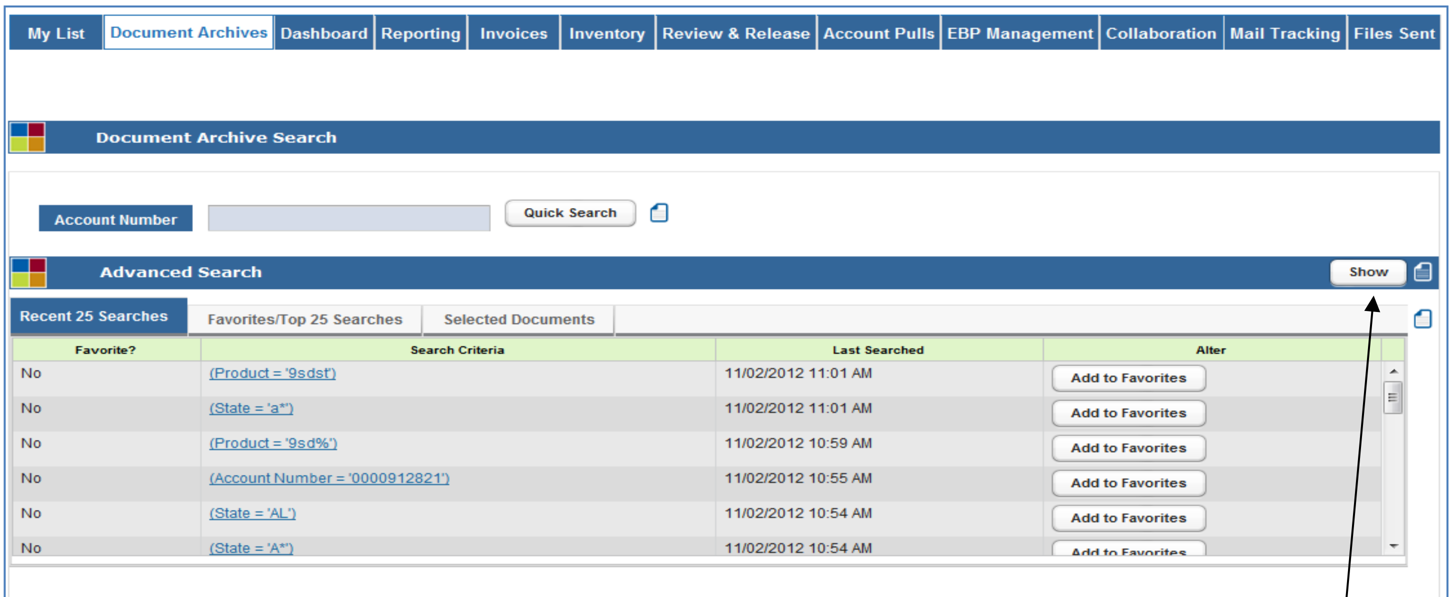
The **PDF Control** Portlet will display at the top of the PDF document.

6. Enter a *fax number*
7. Click the Fax button

Document Archives

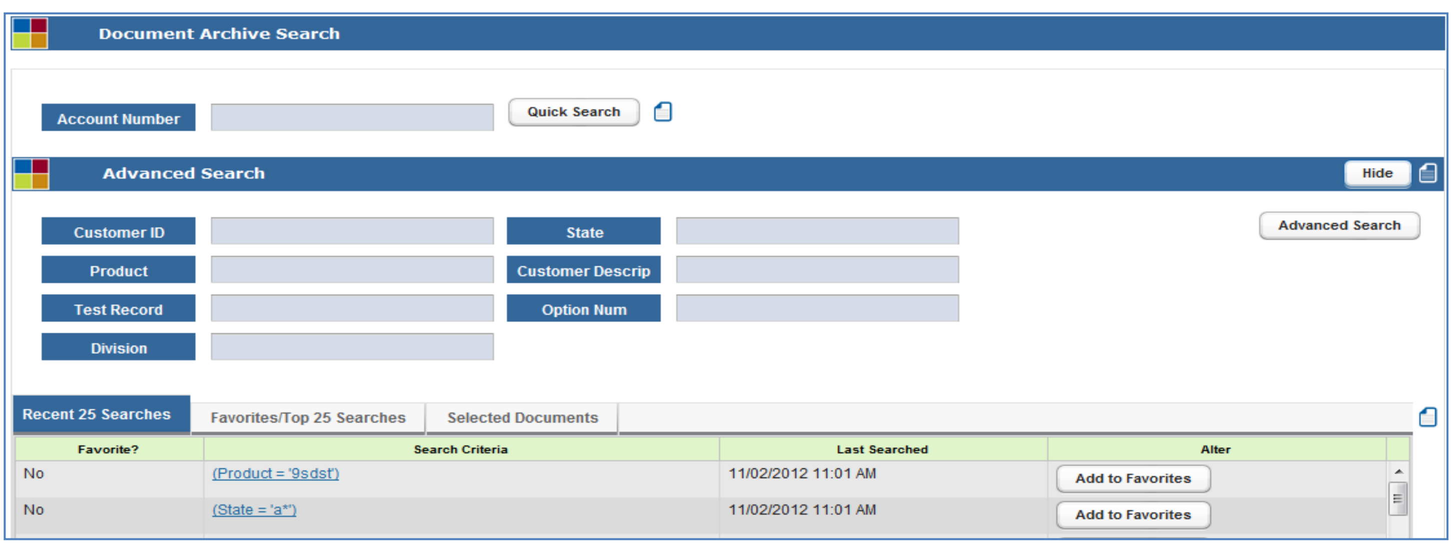
The **Document Archives** Service (available to subscribers of Online View Service) provides an alternate method of performing searches of archived documents. From a single and convenient interface, Users who are granted access by their Company Administrator can execute Quick or Advanced searches to retrieve PDF images of documents, account-specific details, and production data.

The **Document Archives** search feature also provides functionality that enables Users to easily display and reuse results configured to their individual preferences and requirements. This functionality is covered in detail in the **Advanced Search (Document Archives)** section of this guide. Note: The **Document Archives Search** feature requires Compatibility View setting for Microsoft Internet Explorer (IE) 11.



Document Archives Search and Advanced Search Portlets

When **Advanced Search** is assigned, Users can view all available search parameters by clicking the Show button to expand the window.



Expanded View of Advanced Search Portlet

Advanced Search (Document Archives) – Key Features and Functions

Advanced Search enables Users to easily target, retrieve, display, and reuse results configured to their individual preferences and requirements. The following sections describe the major components and functionality provided in **Advanced Search**.

Custom Searches
Advanced Search enables the User to search the Archive on any combination of available indexes that have been pre-configured. This flexibility allows the User to directly target a specific set of images, or present a broad search range. Further, **Advanced Search** enables NCP to configure the interface and available indexes to the Client's specific preferences and needs, including the ability to name the index using Client-specific vocabulary.

Wildcards
Advanced Search supports the full use of wildcard searches on any index, further increasing the flexibility of the search parameters.

Recent Searches
Advanced Search retains the most recent 25 searches performed by a User and enables the User to reuse a search with a single click of the mouse.

Favorite Searches
Advanced Search allows the User to configure, save, and name search configurations as **Favorites** to be reused as needed. This feature provides the User with rapid access to targeted information as well as an assurance that a recurring search is always performed the same way.

Document Collections
Advanced Search enables the User to view a single PDF or to assemble into a single view any combination of PDFs. Using standard browser functionality, the User can print the PDFs, or save the images locally to a file on their network or computer. The User can add or remove PDFs from the collection with a single mouse click.

Results Configuration
Using drag-and-drop technology, the User can change the order of the result set to suit their individual preference or need.

Authorized Viewing
Advanced Search automatically limits the results to the collection of information the User is allowed to view, preventing any information from being disclosed for which the User does not have access.

Product-specific Configuration
Advanced Search allows for specific configuration and display at not only the Client level, but for specific products as well, further enabling the ability to customize the usability of **Advanced Search**.

Advanced Search Overview

When enabled for a Client, **Advanced Search** can be accessed with a single click from any screen inside Portal. To access **Advanced Search**, simply click the icon located at the top right corner of any screen.

Searchable Indexes

Indexes are simply pre-configured collections of facts about the PDFs stored. Using these pre-configurations upon loading the data enables the ability to isolate, target, or directly search for information that is retained in the Archive. There are many indexes that can be configured, providing the flexibility required to meet the needs of the Client.

To perform a search, enter the criteria for the desired index(es) and click the Advanced Search button. The results will be displayed in the **Search Results** Portlet, described later in this document.

Using Wildcards in an Advanced Search

Two wildcard functions are available and can be used in combination with each other, and in any position within the search criteria. Wildcards are used to represent a single character or a collection of characters.

- To represent a single character, use the asterisk symbol (*):
  Example: Searching for a **Name** value using a single character wildcard:
  V* would return all names that begin with "V" regardless of the letters that follow.

- To represent multiple characters, use the percent symbol (%):
  Example: Searching for an **Account Number** using a multiple character wildcard:
  19903% would return all accounts that begin with "19903" regardless of the other numbers that follow in the account number.
  %991 would return all accounts with the last three characters of "991" regardless of the preceding values.
  %88% would return all accounts where the value "88" exists anywhere in the account number.

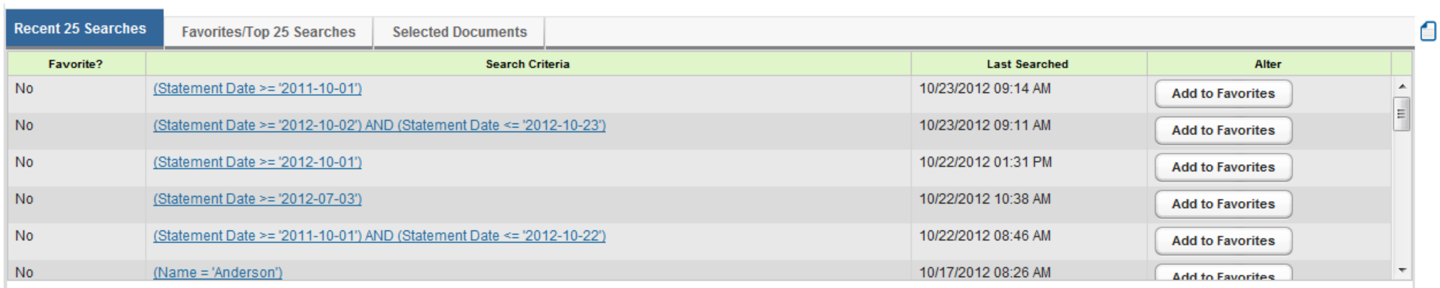
Wildcards can be used in conjunction with each other and anywhere search parameters are requested.

NOTE: If no wildcards are used, the system will automatically apply a "%" wildcard to the end of the search criteria.
Example: Searching for the value "456" will return all data beginning with the characters "456".

Search History / Reusability

Search history is separated into three distinct tabs, allowing quick access to multiple search history displays.

Recent 25 Searches



This tab shows the most recent 25 searches performed by a User and when each search was performed. To recall / resubmit a search, simply click the Search link located in the **Search Criteria** column.

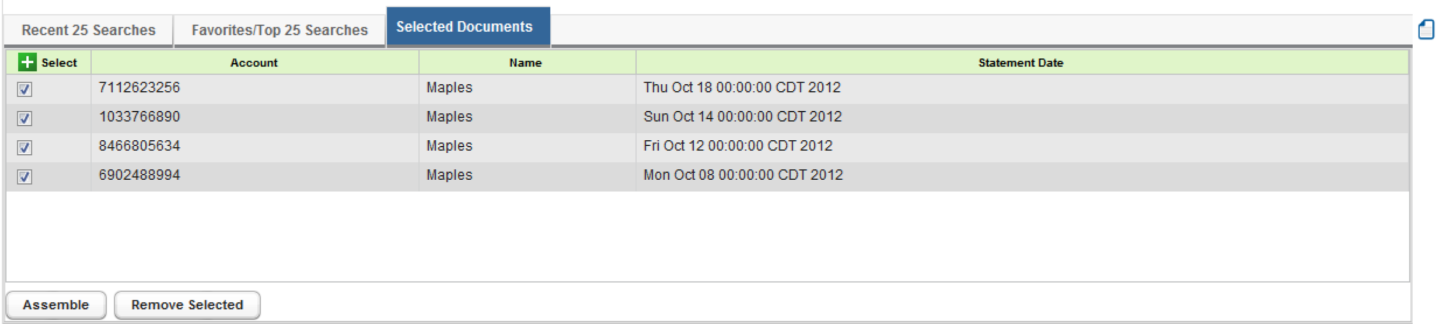
If the User desires to save this search configuration as a **Favorite** search to be used at any time, simply click the Add to Favorites button. This will move the search parameters to the **Favorites / Top 25 Searches** tab where it can be named and reused.

Favorites / Top 25 Searches

This tab shows the User's favorite searches first, then the top 25 most recent searches performed on the account. By default, the search is named "Unnamed Query." To change this to a more meaningful name, simply click on the search name you want to change, type the new name, and click the Save button.

To remove the search as a **Favorite** search, click the Remove from Favorites button.

Selected Documents



This tab shows the documents that the User has selected to view from the results of the search performed. Use the checkboxes in the left column to include or exclude documents from the result set.

To remove all selected documents at once, click the Remove Selected button.

To view the selected documents assembled into a single display (and in a new browser window), click the Assemble button. This will retrieve the selected PDFs from the Archive, assemble the documents into a multi-page single view, and display the file in a new browser window. From here, the User can browse the displayed PDFs, save the file to a local or networked drive, or print the documents to a local or networked printer, all using standard browser functionality.

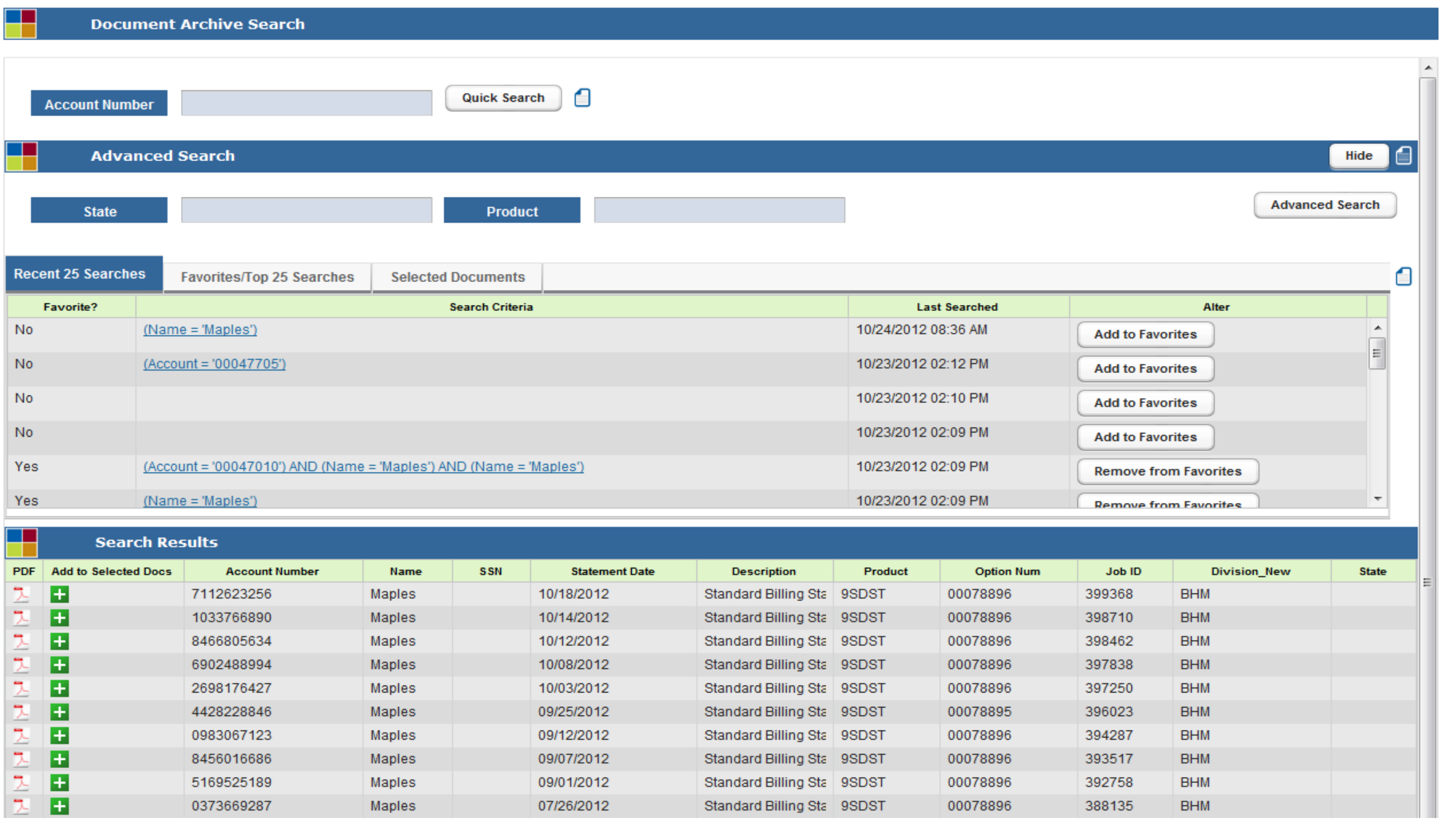
> *If enabled the User can also fax the PDFs to any fax number right from the document display by simply entering the number to which the documents should be faxed.*
>
> *See your NCP Client Manager for more information about this feature.*

Search Results

The **Advanced Search** results screen can be adjusted to the specific needs of the User and will inherit any pre-configured display characteristics. The following sections describe the major abilities the User has when using the **Advanced Search** results.

Default View

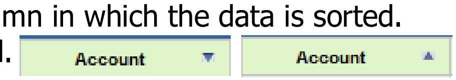
After the **Advanced Search** results initially load, the view can be adjusted to the User's specific needs, as described below.



Working with the Search Results Page

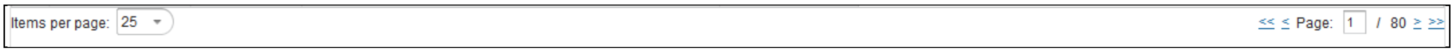
Search Results will show all of the matching results for the executed search. A standard list of columns will be shown as well as any custom indexes that have been pre-defined.

The result set can be sorted in ascending or descending order on any column of data by clicking the column header. Clicking the column header will reverse the order of the sorted information. The order in which the data is sorted will be shown by a small blue triangle in the column in which the data is sorted. The direction of the triangle displays the order in which the data is sorted.



Working with the Search Results Page (continued)

The number of items displayed per page, and the number of pages in the result set (including the page currently being displayed and the ability to move between pages) is shown at the bottom of every search result page.



The position of the column in the result set can be adjusted by clicking and dragging the column to the desired position of the display.

Column widths can be adjusted by placing the mouse over the vertical line separating the columns, clicking and holding the left mouse button, and dragging the column edge to the desired width.

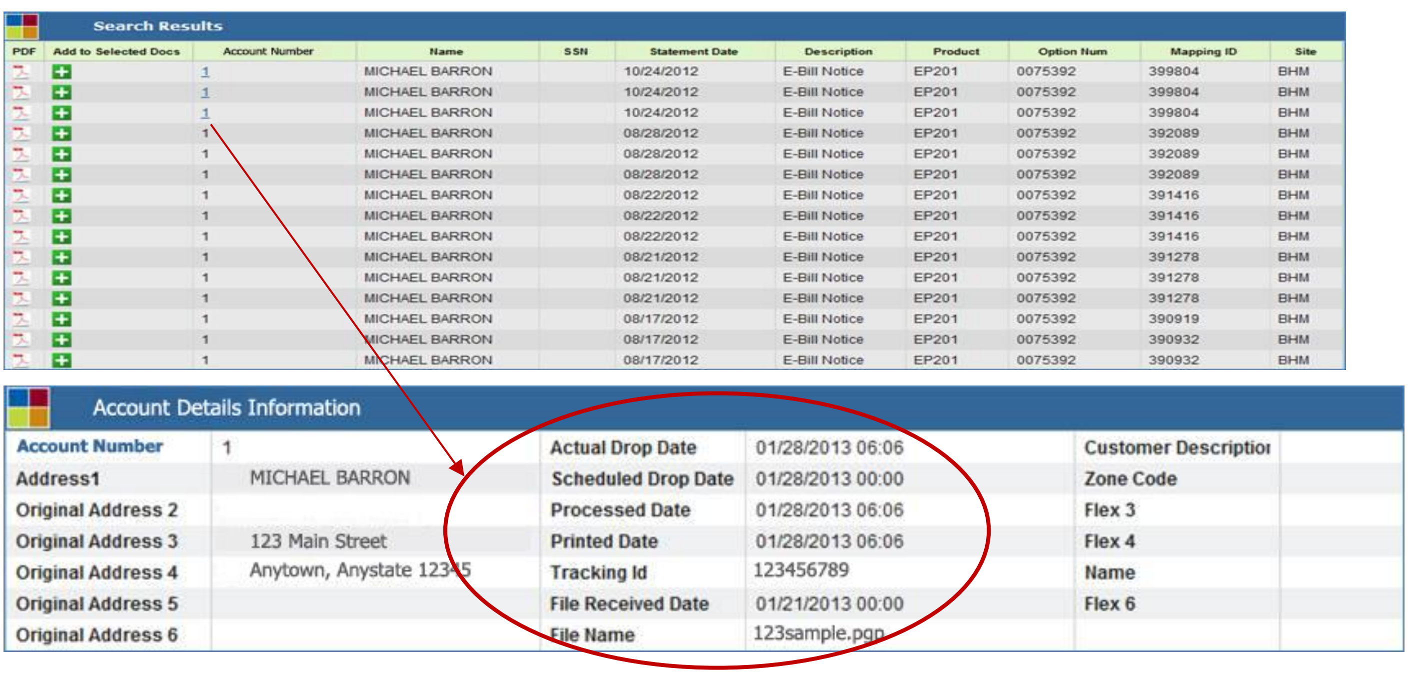
Selecting and Viewing Documents

To view any single document in the **Search Results** display, click the PDF icon for the desired document. This will display the selected document in a new browser window.

To view a collection of documents simultaneously, click the icon in the Add to Selected Docs column to add the document to the **Selected Documents** tab. To view the entire collection of selected documents or to remove a document or documents from the selection, use the **Assemble** and / or **Remove Selected** buttons, as described in the **Selected Documents** section.

Viewing Job Details

To view the Job Details available for an item, click the corresponding **Account Number** hyperlink. An **Account Details Information** Portlet will display the production data. (Job Details are retained for a period of six months.)



Search Results

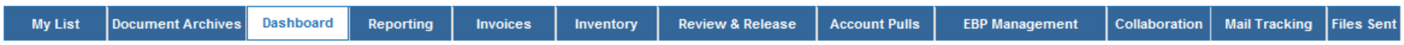
PDF	Add to Selected Docs	Account Number	Name	SSN	Statement Date	Description	Product	Option Num	Mapping ID	Site
		1	MICHAEL BARRON		10/24/2012	E-Bill Notice	EP201	0075392	399804	BHM
		1	MICHAEL BARRON		10/24/2012	E-Bill Notice	EP201	0075392	399804	BHM
		1	MICHAEL BARRON		10/24/2012	E-Bill Notice	EP201	0075392	399804	BHM
		1	MICHAEL BARRON		08/28/2012	E-Bill Notice	EP201	0075392	392089	BHM
		1	MICHAEL BARRON		08/28/2012	E-Bill Notice	EP201	0075392	392089	BHM
		1	MICHAEL BARRON		08/28/2012	E-Bill Notice	EP201	0075392	392089	BHM
		1	MICHAEL BARRON		08/22/2012	E-Bill Notice	EP201	0075392	391416	BHM
		1	MICHAEL BARRON		08/22/2012	E-Bill Notice	EP201	0075392	391416	BHM
		1	MICHAEL BARRON		08/22/2012	E-Bill Notice	EP201	0075392	391416	BHM
		1	MICHAEL BARRON		08/21/2012	E-Bill Notice	EP201	0075392	391278	BHM
		1	MICHAEL BARRON		08/21/2012	E-Bill Notice	EP201	0075392	391278	BHM
		1	MICHAEL BARRON		08/21/2012	E-Bill Notice	EP201	0075392	391278	BHM
		1	MICHAEL BARRON		08/17/2012	E-Bill Notice	EP201	0075392	390919	BHM
		1	MICHAEL BARRON		08/17/2012	E-Bill Notice	EP201	0075392	390932	BHM
		1	MICHAEL BARRON		08/17/2012	E-Bill Notice	EP201	0075392	390932	BHM

Account Details Information

Account Number	1	Actual Drop Date	01/28/2013 06:06	Customer Descriptior	
Address1	MICHAEL BARRON	Scheduled Drop Date	01/28/2013 00:00	Zone Code	
Original Address 2		Processed Date	01/28/2013 06:06	Flex 3	
Original Address 3	123 Main Street	Printed Date	01/28/2013 06:06	Flex 4	
Original Address 4	Anytown, Anystate 12345	Tracking Id	123456789	Name	
Original Address 5		File Received Date	01/21/2013 00:00	Flex 6	
Original Address 6		File Name	123sample.pgp		

Main Services Toolbar

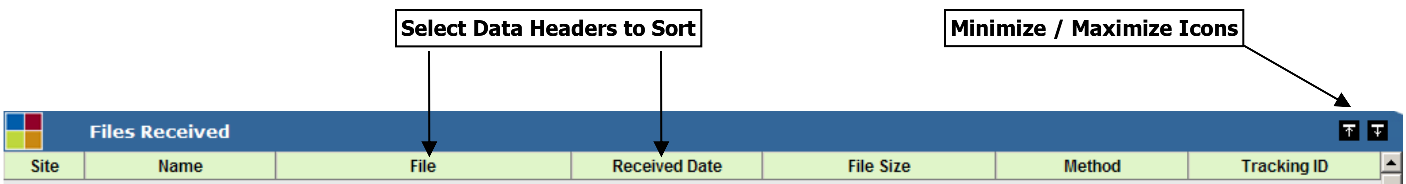
The **Main Services Toolbar** provides Users with convenient access to information and tools available throughout Portal. By default, Users are directed to the production **Dashboard** upon login, unless multiple companies are defined for the Client relationship and User role. In those cases, Users are directed to **My List** (described later in this document) where a company selection is required prior to accessing the **Dashboard** for that specific account.



Portlet Attributes

Portlets are 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 in ascending or descending order by clicking on a Data Header. Portlets can be minimized or maximized using the action buttons located on the top right corner of the Portlet header bar.



It is possible to screen scrape information from any Portlet by highlighting the data displayed on the screen and copying it to the Windows Clipboard. It can then be pasted directly into applications such as Microsoft Excel or saved as a text file on your local computer.

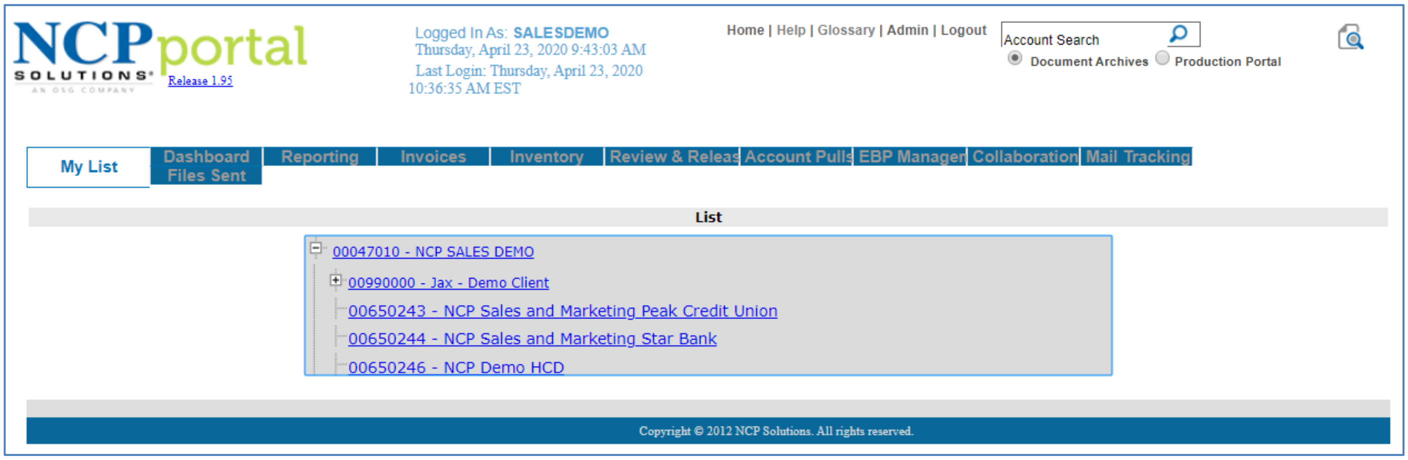
However, the **Reporting** module provides a more elegant method to export data from Portal. (Please see the **Reporting** section of this document for complete details.)

Jobs In Production

Site	Name	Job ID	Product	Description	Quantity	Status	Received Date	Scheduled Drop Date	Status
BHM	NCP SALES DEMO	289672	9SDST	Standard Billing Statement	12617	Received	06/09/2010	06/11/2010	
BHM	NCP SALES DEMO	289541	9SDST	Standard Billing Statement	2318	Received	06/06/2010	06/09/2010	
BHM	NCP SALES DEMO	289538	9SDST	Standard Billing Statement	8593	Received	06/07/2010	06/09/2010	
BHM	NCP SALES DEMO	289535	1T115	Coupon Books - standard green coupon	1573	Received	06/08/2010	06/10/2010	
BHM	NCP SALES DEMO	289534	9SDST	Standard Billing Statement	6866	Received	06/08/2010	06/10/2010	
BHM	NCP SALES DEMO	288963	1T115	Coupon Books - standard green coupon	35121	Received	05/28/2010	06/04/2010	
BHM	NCP SALES DEMO	288962	9SDST	Standard Billing Statement	58229	Received	05/28/2010	06/04/2010	
BHM	NCP SALES DEMO	283530	9SDST	Standard Billing Statement	20	Received	04/13/2010	04/14/2010	
BHM	NCP SALES DEMO	280366	9SDST	Standard Billing Statement	22	Received	03/18/2010	03/22/2010	
BHM	NCP SALES DEMO	278985	9SDST	Standard Billing Statement	26	Received	03/08/2010	03/09/2010	

Jobs in Production Portlet with Line Items Selected

My List (Client List)



Client List

My List contains a listing of all companies that have been defined by your Company Administrator. Each User has a list of Client Number/Client Name to which they have been given access. This list could contain a single Client, or in the case of sub-servicing, may include multiple Clients or companies.

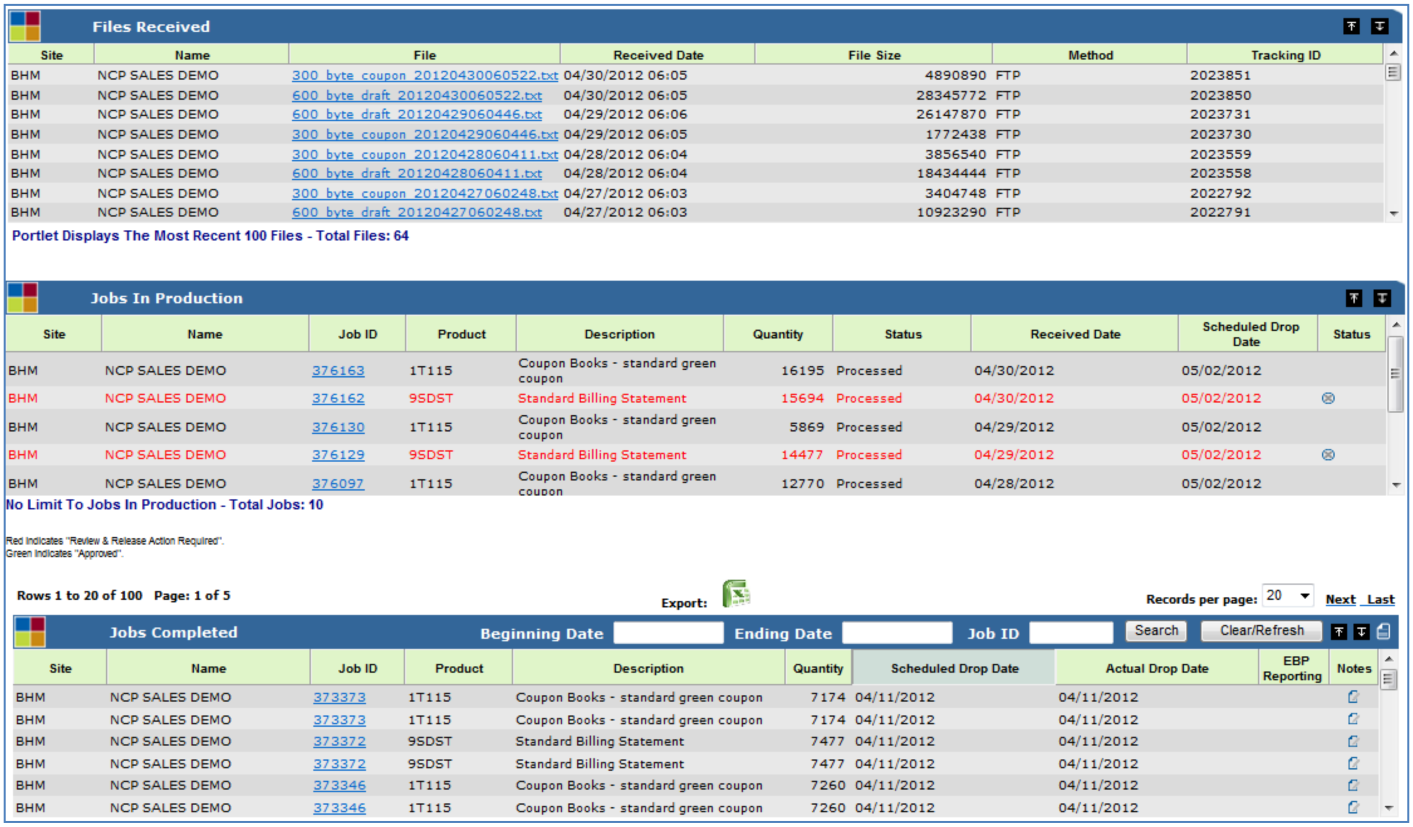
Upon successful login, Clients/Users with only one company defined will be taken directly to the **Dashboard** Service. For those Clients/Users who have multiple companies defined, **My List** will be displayed instead of **Dashboard**. Selection of a Client Name from **My List** will then display the **Dashboard** for that Client.

Click on a specific Client Number to access the **Dashboard** for that account.

- Access rights to Client accounts are controlled by the Company Administrator.

![NCP Solutions logo]

Dashboard



Files Received

Site	Name	File	Received Date	File Size	Method	Tracking ID
BHM	NCP SALES DEMO	300_byte_coupon_20120430060522.txt	04/30/2012 06:05	4890890	FTP	2023851
BHM	NCP SALES DEMO	600_byte_draft_20120430060522.txt	04/30/2012 06:05	28345772	FTP	2023850
BHM	NCP SALES DEMO	600_byte_draft_20120429060446.txt	04/29/2012 06:06	26147870	FTP	2023731
BHM	NCP SALES DEMO	300_byte_coupon_20120429060446.txt	04/29/2012 06:05	1772438	FTP	2023730
BHM	NCP SALES DEMO	300_byte_coupon_20120428060411.txt	04/28/2012 06:04	3856540	FTP	2023559
BHM	NCP SALES DEMO	600_byte_draft_20120428060411.txt	04/28/2012 06:04	18434444	FTP	2023558
BHM	NCP SALES DEMO	300_byte_coupon_20120427060248.txt	04/27/2012 06:03	3404748	FTP	2022792
BHM	NCP SALES DEMO	600_byte_draft_20120427060248.txt	04/27/2012 06:03	10923290	FTP	2022791

Portlet Displays The Most Recent 100 Files - Total Files: 64

Jobs In Production

Site	Name	Job ID	Product	Description	Quantity	Status	Received Date	Scheduled Drop Date	Status
BHM	NCP SALES DEMO	376163	1T115	Coupon Books - standard green coupon	16195	Processed	04/30/2012	05/02/2012	
BHM	NCP SALES DEMO	376162	9SDST	Standard Billing Statement	15694	Processed	04/30/2012	05/02/2012	
BHM	NCP SALES DEMO	376130	1T115	Coupon Books - standard green coupon	5869	Processed	04/29/2012	05/02/2012	
BHM	NCP SALES DEMO	376129	9SDST	Standard Billing Statement	14477	Processed	04/29/2012	05/02/2012	
BHM	NCP SALES DEMO	376097	1T115	Coupon Books - standard green coupon	12770	Processed	04/28/2012	05/02/2012	

No Limit To Jobs In Production - Total Jobs: 10

Red Indicates "Review & Release Action Required".
Green Indicates "Approved".

Rows 1 to 20 of 100 Page: 1 of 5 Export: Records per page: 20 Next Last

Jobs Completed Beginning Date Ending Date Job ID Search Clear/Refresh

Site	Name	Job ID	Product	Description	Quantity	Scheduled Drop Date	Actual Drop Date	EBP Reporting	Notes
BHM	NCP SALES DEMO	373373	1T115	Coupon Books - standard green coupon	7174	04/11/2012	04/11/2012		
BHM	NCP SALES DEMO	373373	1T115	Coupon Books - standard green coupon	7174	04/11/2012	04/11/2012		
BHM	NCP SALES DEMO	373372	9SDST	Standard Billing Statement	7477	04/11/2012	04/11/2012		
BHM	NCP SALES DEMO	373372	9SDST	Standard Billing Statement	7477	04/11/2012	04/11/2012		
BHM	NCP SALES DEMO	373346	1T115	Coupon Books - standard green coupon	7260	04/11/2012	04/11/2012		
BHM	NCP SALES DEMO	373346	1T115	Coupon Books - standard green coupon	7260	04/11/2012	04/11/2012		

Dashboard Main Screen

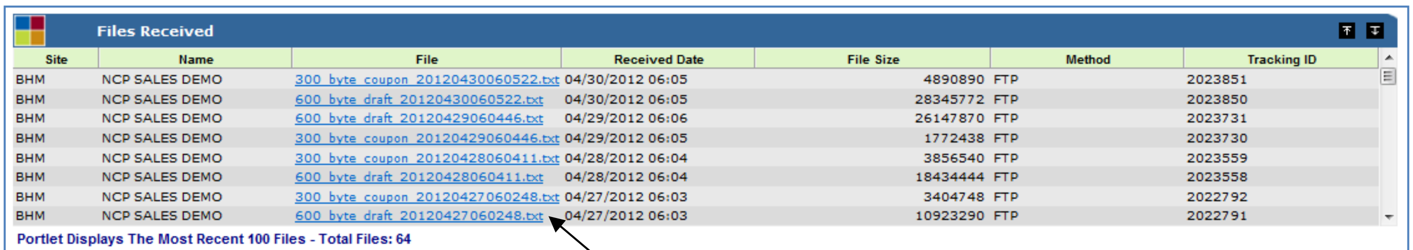
The **Dashboard** provides a consolidated and instant view of the entire production process through the use of Portlets. Three Portlets are integrated into the **Dashboard** main page:

- **Files Received** Portlet
- **Jobs In Production** Portlet
- **Jobs Completed** Portlet

Files Received Portlet

The **Files Received** Portlet contains Data Headers that display a list of all data files that have been received by NCP for processing and production. Information about each file contained within the **Files Received** Portlet includes:

- **Site -** NCP location where the data was sent
- **Name -** Client name
- **File -** File name
- **Received Date –** Date that a file was received from a Client by NCP for processing
- **File Size**
- **Method -** Transmission method
- **Tracking ID -** A unique, system-generated number that is assigned to each file received by NCP



Files Received

Site	Name	File	Received Date	File Size	Method	Tracking ID
BHM	NCP SALES DEMO	300_byte_coupon_20120430060522.txt	04/30/2012 06:05	4890890	FTP	2023851
BHM	NCP SALES DEMO	600_byte_draft_20120430060522.txt	04/30/2012 06:05	28345772	FTP	2023850
BHM	NCP SALES DEMO	600_byte_draft_20120429060446.txt	04/29/2012 06:06	26147870	FTP	2023731
BHM	NCP SALES DEMO	300_byte_coupon_20120429060446.txt	04/29/2012 06:05	1772438	FTP	2023730
BHM	NCP SALES DEMO	300_byte_coupon_20120428060411.txt	04/28/2012 06:04	3856540	FTP	2023559
BHM	NCP SALES DEMO	600_byte_draft_20120428060411.txt	04/28/2012 06:04	18434444	FTP	2023558
BHM	NCP SALES DEMO	300_byte_coupon_20120427060248.txt	04/27/2012 06:03	3404748	FTP	2022792
BHM	NCP SALES DEMO	600_byte_draft_20120427060248.txt	04/27/2012 06:03	10923290	FTP	2022791

Portlet Displays The Most Recent 100 Files - Total Files: 64

Files Received Portlet

Click to view File & Job Details

Files that are processed inside the NCP workflow system and that contain account records scheduled for production become hyperlinked allowing the User to drill down to the **File** and **Job Details** level. This level provides the User with more detailed information along with the **Job Details** that are contained within that file.

Click on a hyperlinked filename under the **File** Data Header to display the **File Details** and **Job Details** Portlets.

File Details and Job Details Portlets

The **File Details** and **Job Details** Portlets provide Users with detailed information for each Job contained within the selected file.

File Details

File Name	Date Received	Size	Tracking Id
600_byte_draft_20120428060411.txt	2012-04-28 06:04:00.0	18434444	2023558

Job Details

Site Location	Name	Job ID	Product	Description	Quantity	Status	Scheduled Drop Date	Actual Drop Date
BHM	NCP SALES DEMO	376096	9SDST	Standard Billing Statement	10206	Processed	05/02/2012	
					Sub Total : 10206			
					Grand Total : 10206			

File & Job Details – Product View Screen

Click to view Option Details

Job Details Portlet– Product View

The **Job Details** section of the Portlet delivers important information about all Jobs currently in production. The information displayed includes the following Data Headers:

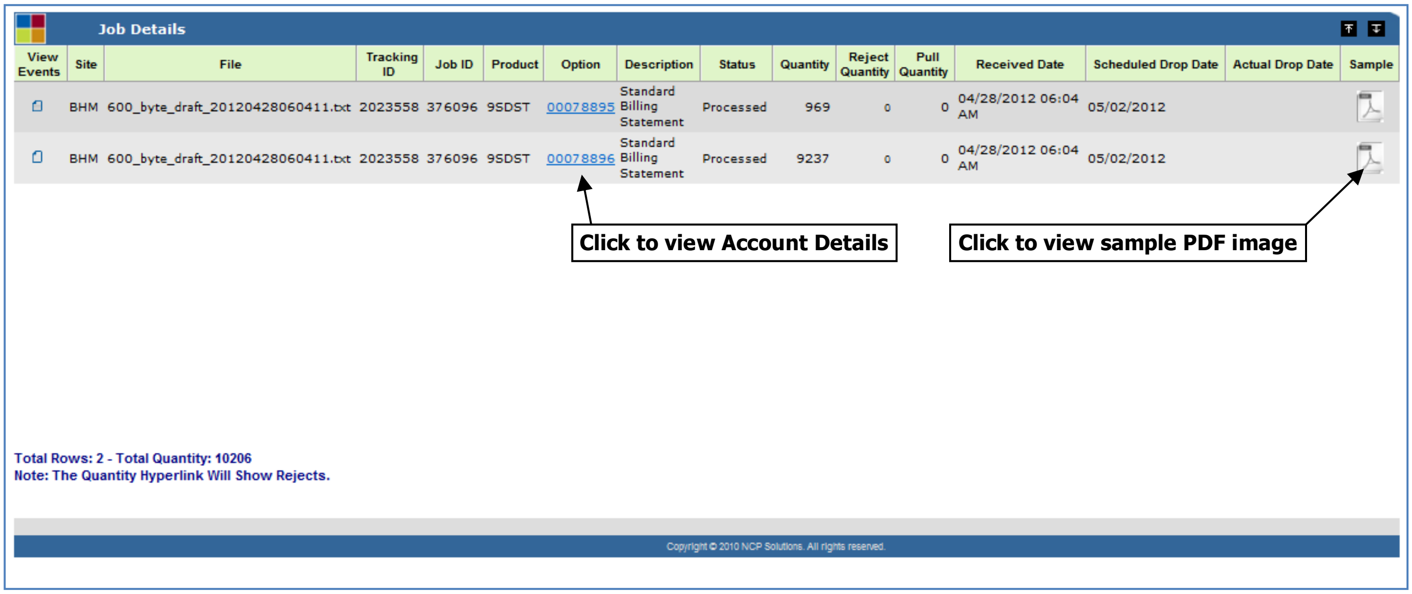
- **Site -** NCP location where the data was sent
- **Name -** Client name
- **Job ID -** A number assigned to a data file or group of files that is used to track work in progress
- **Product -** Product number
- **Description -** Product description
- **Quantity -** Quantity to be processed
- **Status -** Production status
- **Scheduled Drop Date -** Date that a Job is scheduled to be completed and mailed
- **Actual Drop Date -** Date that a Job is completed and mailed

Products can be viewed at a more granular level (known as the Option), by clicking the hyperlink under the **Job ID** Data Header in **Job Details** Portlet.

Job Details Portlet– Option View

The **Job Details** – Option level displays all of the Options contained within a specific Job. It also provides the ability to view a sample PDF image of each Product/Option variation (if available).

- The PDF generated is a random sample of the Option selected.

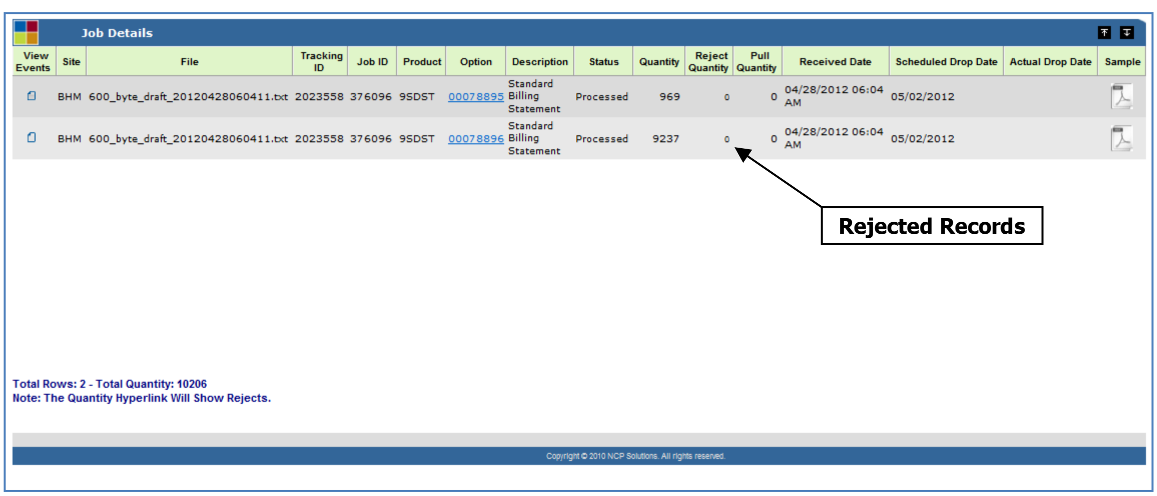


View Events	Site	File	Tracking ID	Job ID	Product	Option	Description	Status	Quantity	Reject Quantity	Pull Quantity	Received Date	Scheduled Drop Date	Actual Drop Date	Sample
	BHM	600_byte_draft_20120428060411.txt	2023558	376096	9SDST	00078895	Standard Billing Statement	Processed	969	0	0	04/28/2012 06:04 AM	05/02/2012		
	BHM	600_byte_draft_20120428060411.txt	2023558	376096	9SDST	00078896	Standard Billing Statement	Processed	9237	0	0	04/28/2012 06:04 AM	05/02/2012		

Job Details – Option View Screen

Rejected Records

Files that have been received and contain records that cannot be processed by the NCP workflow system are rejected by the system. File rejections can occur for many reasons, however, are usually caused by the existence of a duplicate record, a record that has become corrupted, or a record that is missing required information.



View Events	Site	File	Tracking ID	Job ID	Product	Option	Description	Status	Quantity	Reject Quantity	Pull Quantity	Received Date	Scheduled Drop Date	Actual Drop Date	Sample
	BHM	600_byte_draft_20120428060411.txt	2023558	376096	9SDST	00078895	Standard Billing Statement	Processed	969	0	0	04/28/2012 06:04 AM	05/02/2012		
	BHM	600_byte_draft_20120428060411.txt	2023558	376096	9SDST	00078896	Standard Billing Statement	Processed	9237	0	0	04/28/2012 06:04 AM	05/02/2012		

Job Details – Option View Screen w/Rejects

Records that have been rejected are identified by a hyperlinked Quantity value. Click on a Quantity to view the rejected records for that specific Option.

To view all rejected records for the entire Job, click the View All Rejects button.

Rejects

Tracking Id	Job ID	Product	Option	Description	Account Number	Rejected Quantity	Reject Reason
1637650	288275	5S330	00058703	Coupon Books standard blue cou	000000000020007759038	1	ACCOUNT DUPLICATED - REJECTING
1637650	288275	5S330	00058703	Coupon Books standard blue cou	000000000020005650874	1	ACCOUNT DUPLICATED - REJECTING
1637650	288275	5S330	00058703	Coupon Books standard blue cou	000000000020004907440	1	ACCOUNT DUPLICATED - REJECTING

Rejected Records

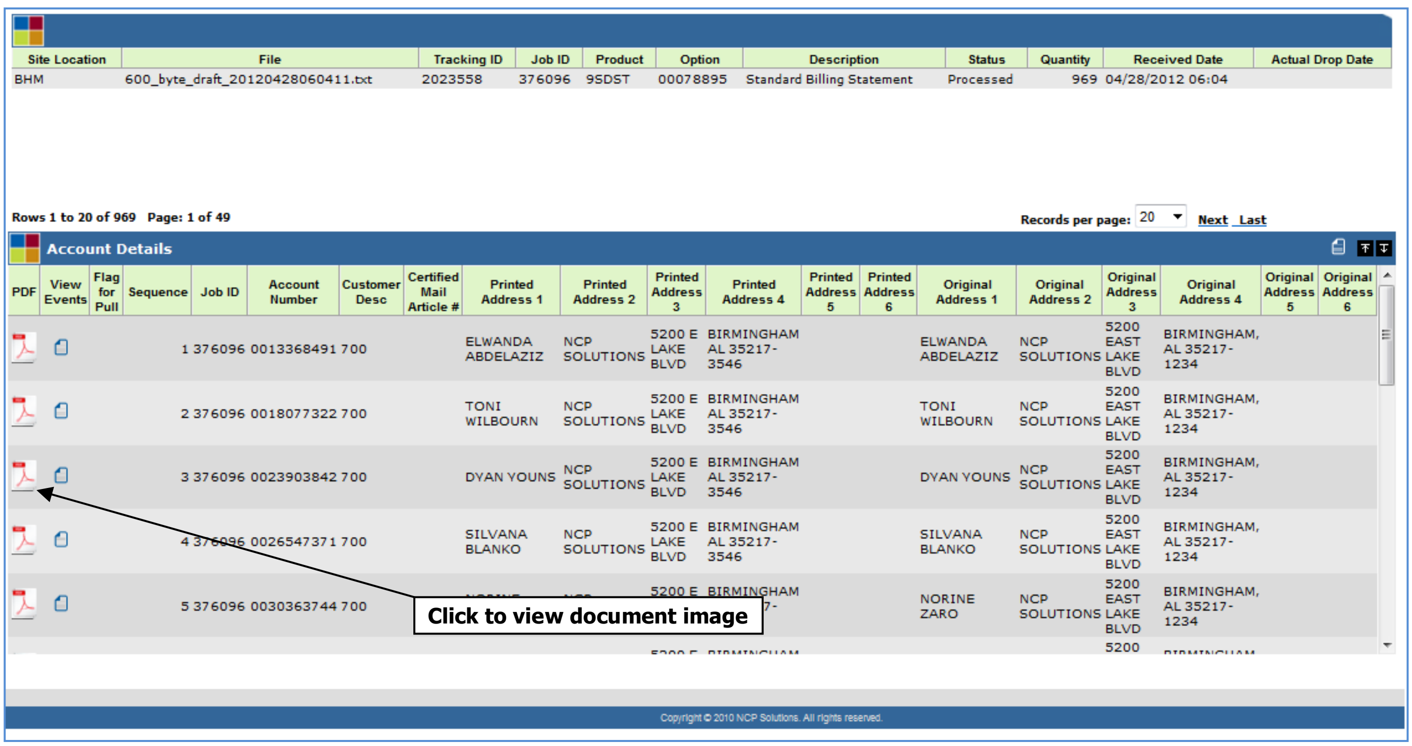
Account Details Portlet

When available, the Option number will be hyperlinked under the Option Data Header allowing the User to drill down to the individual **Account Level** components contained within the Job, along with a PDF image of the actual document that has been produced (if available).

The **Account Details** screen provides you with the following information:

- **PDF** - Image of the Actual Document
- **View Events –** User Event History
- **Flag for Pulls** (Please refer the Account Pulls section of this document for instructions on utilizing the Account Pulls Service or click here (if viewing electronically).
- **Sequence #**
- **Job ID -** A number assigned to a data file or group of files that is used to track work in progress
- **Account Number**
- **Customer Description**
- **Certified Mail Article #**
- **Original Address 1-6**

For Clients who subscribe to NCP's **PDF Image Archiving** Services, they will have the ability to view the document associated with a particular account by clicking on the PDF icon.
Note: **PDF Image Archiving** Services is currently not available to Coupon Book Clients.



Account Details Screen

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AN OSG COMPANY

Electronic Return Receipt

When certified mail is sent, the Account Details Portlet will show the Certified Article #. Once certified mail has left NCP's facility, the Certified Article # will become a link that, when clicked, provides information regarding the status of that mailpiece.

Job Details

View Events	Site	File	Tracking ID	Job ID	Product	Option	Description	Status	Quantity	Reject Quantity	Pull Quantity	Received Date	Scheduled Drop Date	Actual Drop Date	Sample
	BHM	600_byte_draft_20110924060206.txt	1896171	346282	9SDST	00078895	Standard Billing Statement	Mailed	562	0	0	09/24/2011 06:02 AM	09/28/2011	09/28/2011	

Rows 1 to 1 of 1 Page: 1 of 1 **Records per page:** 20

Account Details

PDF	View Events	Flag for Pull	Sequence	Job ID	Account Number	Customer Desc	Certified Mail Article #	Printed Address 1	Printed Address 2	Printed Address 3	Printed Address 4	Printed Address 5	Printed Address 6	Original Address 1	Original Address 2	Original Address 3	Original Address 4	Original Address 5	Original Address 6
			20	346282	0307371484		71067112170435537337	WILBERT HILB	NCP SOLUTIONS	5200 E LAKE BLVD	BIRMINGHAM AL 35217-3546			WILBERT HILB	NCP SOLUTIONS	5200 EAST LAKE BLVD	BIRMINGHAM, AL 35217-1234		

Click the Certified Mail Article # link to view the Electronic Return Receipt USPS Event History module.

Electronic Return Receipt USPS Event History **Certified Number** Go

PDF	USPS Event Date	Account Number	Address Line 1	Certified Mail Article #	USPS Scanning Facility	USPS Event	USPS Event Description	View Event History
	10/22/2011 08:19 PM	0307371484	WILBERT HILB	71067112170435537337	SILVER SPRING,MD, 20905	Delivered*	Scan of the package by the carrier at the final delivery address. This scan may also be used when an item is undeliverable for any reason and is sent back to the mailer and is subsequently scanned as "Delivered" back to the originating mailer.	
	10/22/2011 04:37 PM	0307371484	WILBERT HILB	71067112170435537337	SILVER SPRING,MD, 20905	Arrival at Unit	Indicates the mailpiece was scanned at the final postal unit where delivery of the mailpiece will occur.	
	10/22/2011 11:29 AM	0307371484	WILBERT HILB	71067112170435537337	GAITHERSBURG,MD, 20898	Processed	This is an automated, intermediary scan of the package as it travels through a USPS processing facility.	
	10/22/2011 08:50 AM	0307371484	WILBERT HILB	71067112170435537337	GAITHERSBURG,MD, 20898	Processed	This is an automated, intermediary scan of the package as it travels through a USPS processing facility.	
	10/17/2011 06:19 PM	0307371484	WILBERT HILB	71067112170435537337	BUFFALO,NY, 14240	Delivered*	Scan of the package by the carrier at the final delivery address. This scan may also be used when an item is undeliverable for any reason and is sent back to the mailer and is subsequently scanned as "Delivered" back to the originating mailer.	
	10/17/2011 06:03 PM	0307371484	WILBERT HILB	71067112170435537337	BUFFALO,NY, 14240	Arrival at Unit	Indicates the mailpiece was scanned at the final postal unit where delivery of the mailpiece will occur.	
	10/16/2011 04:17 PM	0307371484	WILBERT HILB	71067112170435537337	BUFFALO,NY, 14240	Arrival at Unit	Indicates the mailpiece was scanned at the final postal unit where delivery of the mailpiece will occur.	
	09/24/2011 08:24 PM	0307371484	WILBERT HILB	71067112170435537337	ROCK ISLAND,IL, 61201	Attempted / Notice Left*	Scan of the package at the final delivery address but delivery not made due to no recipient available, unsafe to leave unattended, etc. Notice left includes leaving a USPS Form 3849 Delivery Notice / Reminder / Receipt.	
	09/24/2011 01:46 PM	0307371484	WILBERT HILB	71067112170435537337	MILAN,IL, 61264	Processed	This is an automated, intermediary scan of the package as it travels through a USPS processing facility.	
	09/24/2011 11:03 AM	0307371484	WILBERT HILB	71067112170435537337	MILAN,IL, 61264	Processed	This is an automated, intermediary scan of the package as it travels through a USPS processing facility.	

The Electronic Return Receipt USPS Event History module provides tracking details of USPS events associated with the Certified Mail Article #.

When mail has been delivered and a signature is available, proof of delivery can be viewed by clicking the PDF icon associated with the "Delivered" event on this screen.

UNITED STATES POSTAL SERVICE

Date: 03/24/2009

Dave Erwin:

The following is in response to your 03/23/2009 request for delivery information on your Certified Mail(TM) item number 7106 7112 1690 0057 8645. The delivery record shows that this item was delivered on 03/23/2009 at 08:50 AM in BIRMINGHAM, AL 35217. The scanned image of the recipient information is provided below.

Signature of Recipient: 

Address of Recipient: 

Thank you for selecting the Postal Service for your mailing needs. If you require additional assistance, please contact your local Post Office or postal representative.

Sincerely,

United States Postal Service

All information contained on the Electronic Return Receipt USPS Event History module is provided directly by the United States Postal Service.

Jobs in Production Portlet

Files that have progressed to the processed status within the NCP workflow system are moved from the **Files Received** Portlet to the **Jobs in Production** Portlet**.** This Portlet delivers detailed information on every Job that is currently in production. The information provided by the Portlet includes:

- **Site -** NCP location where the data was sent
- **Name -** Client name
- **Job ID -** A number assigned to a data file or group of files that is used to track work in progress
- **Product -** Product Number
- **Description -**Product Description
- **Quantity -** Product Quantity
- **Status -** Job Status
- **Received Date** - Date that a file was received from a Client by NCP for processing
- **Scheduled Drop Date -** Date that a Job is scheduled to be completed and mailed
- **Status -** Job status icons (if Review and Release is configured)

Jobs In Production

Site	Name	Job ID	Product	Description	Quantity	Status	Received Date	Scheduled Drop Date	Status
BHM	NCP SALES DEMO	289672	9SDST	Standard Billing Statement	12617	Received	06/09/2010	06/11/2010	
BHM	NCP SALES DEMO	289541	9SDST	Standard Billing Statement	2318	Received	06/06/2010	06/09/2010	
BHM	NCP SALES DEMO	289538	9SDST	Standard Billing Statement	8593	Received	06/07/2010	06/09/2010	
BHM	NCP SALES DEMO	289535	1T115	Coupon Books - standard green coupon	1573	Received	06/08/2010	06/10/2010	
BHM	NCP SALES DEMO	289534	9SDST	Standard Billing Statement	6866	Received	06/08/2010	06/10/2010	
BHM	NCP SALES DEMO	288963	1T115	Coupon Books - standard green coupon	35121	Received	05/28/2010	06/04/2010	
BHM	NCP SALES DEMO	288962	9SDST	Standard Billing Statement	58229	Received	05/28/2010	06/04/2010	
BHM	NCP SALES DEMO	283530	9SDST	Standard Billing Statement	20	Received	04/13/2010	04/14/2010	
BHM	NCP SALES DEMO	280366	9SDST	Standard Billing Statement	22	Received	03/18/2010	03/22/2010	
BHM	NCP SALES DEMO	278985	9SDST	Standard Billing Statement	26	Received	03/08/2010	03/09/2010	
BHM	NCP SALES DEMO	277471	1T3AB	Mortgage Books - burgundy coupon	1	Received	02/24/2010	02/25/2010	
BHM	NCP SALES DEMO	277250	1S307	Coupon Book - blue coupon	52	Received	02/23/2010	02/24/2010	
BHM	NCP SALES DEMO	276332	9SDST	Standard Billing Statement	13	Received	02/16/2010	02/17/2010	
BHM	NCP SALES DEMO	101809	1G2U1	2 Up Book	2	Received	05/13/2010	05/19/2010	
BHM	NCP SALES DEMO	101679	9SDST	Standard Billing Statement	15	Received	05/06/2010	05/10/2010	

No Limit To Jobs In Production - Total Jobs: 15

Red indicates "Review & Release Action Required".
Green indicates "Approved".

Click to view Job Details

Review & Release Action Icons

Jobs in Production Portlet

If **Review and Release** is configured, Jobs listed will be color coded to assist the User in determining if a specific action is required for a particular Job. The Status column contains an icon that is linked directly to the **Review and Release** Portlet, thereby allowing the User to quickly and easily approve any pending and/or held Jobs.

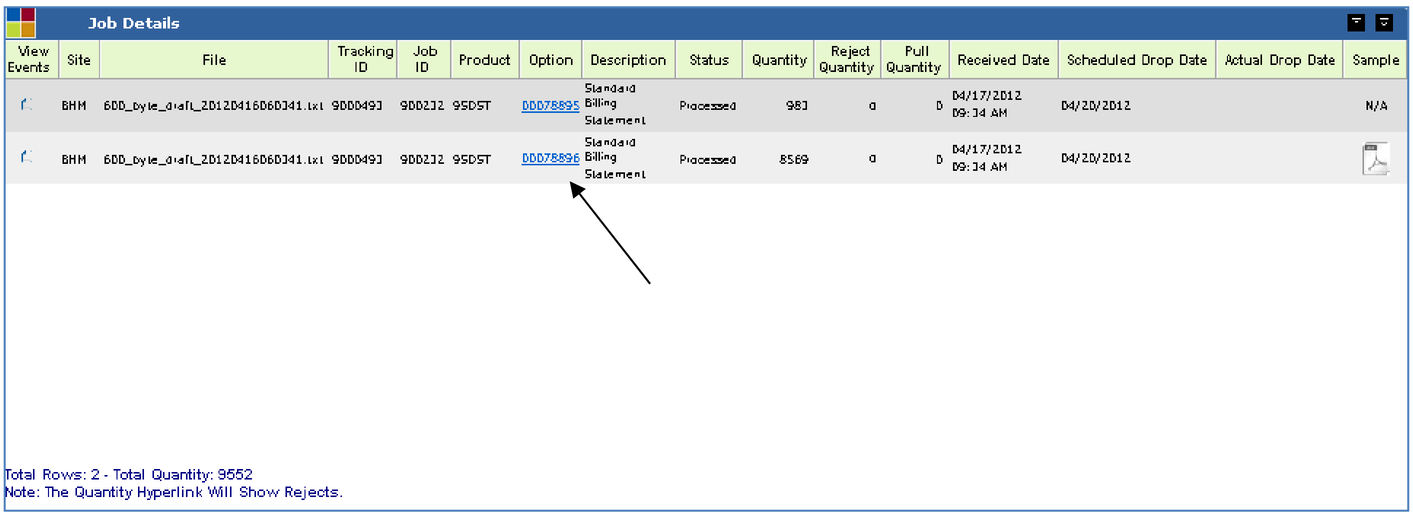
The three possible Job conditions are:

Green Jobs listed in green have been approved and released for production and require no action.

Red Jobs listed in red have not been approved for release to production and require User action.

Black Jobs listed in black have not been configured for Review & Release and will follow normal processing procedures.

The **Job ID** contains a hyperlink which allows the User to click through to the **Job Details** – Option View.



Job Details

View Events	Site	File	Tracking ID	Job ID	Product	Option	Description	Status	Quantity	Reject Quantity	Pull Quantity	Received Date	Scheduled Drop Date	Actual Drop Date	Sample
	BHM	600_byte_draft_20120416060341.txt	9000493	900232	95DST	00078895	Standard Billing Statement	Processed	983	0	0	04/17/2012 09:34 AM	04/20/2012		N/A
	BHM	600_byte_draft_20120416060341.txt	9000493	900232	95DST	00078896	Standard Billing Statement	Processed	8569	0	0	04/17/2012 09:34 AM	04/20/2012		

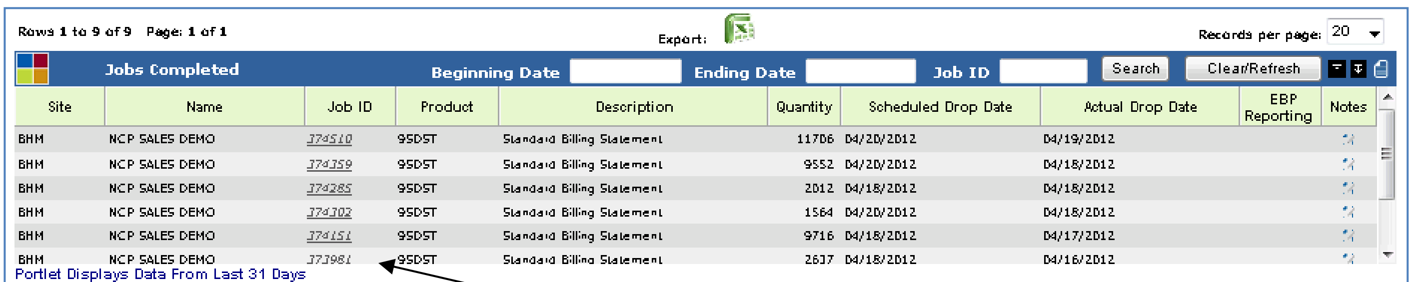
Total Rows: 2 - Total Quantity: 9552
Note: The Quantity Hyperlink Will Show Rejects.

Job Details – Option View

Jobs Completed Portlet

Jobs that have been updated to a Mailed, Archived, Completed, or Shipped status inside the NCP workflow system are moved to the **Jobs Completed** Portlet. The **Jobs Completed** Portlet delivers information on every Job that has been presented to the USPS or shipped out of the production facility via another carrier. The page provides **Job Details** at the Product View level including:

- **Site -** NCP location where the data was sent
- **Name -** Client name
- **Job ID -** A number assigned to a data file or group of files that is used to track work in progress
- **Product -** Product Number
- **Description -**Product Description
- **Quantity -** Product Quantity
- **Scheduled Drop Date -** Date that a Job is scheduled to be completed and mailed
- **Actual Drop Date -** Date that a Job is completed and mailed
- **EBP Reporting**
- **Notes**



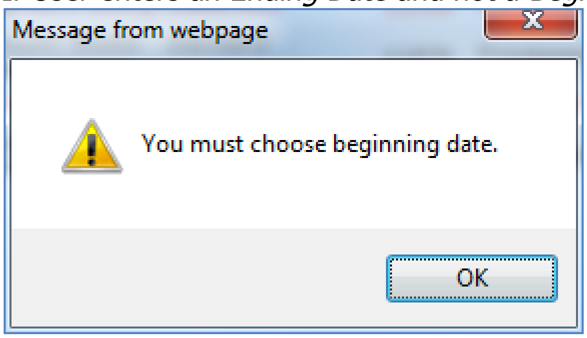
Site	Name	Job ID	Product	Description	Quantity	Scheduled Drop Date	Actual Drop Date	EBP Reporting	Notes
BHM	NCP SALES DEMO	374510	95DST	Standard Billing Statement	11706	04/20/2012	04/19/2012		
BHM	NCP SALES DEMO	374359	95DST	Standard Billing Statement	9552	04/20/2012	04/18/2012		
BHM	NCP SALES DEMO	374285	95DST	Standard Billing Statement	2012	04/18/2012	04/18/2012		
BHM	NCP SALES DEMO	374302	95DST	Standard Billing Statement	1564	04/20/2012	04/18/2012		
BHM	NCP SALES DEMO	374151	95DST	Standard Billing Statement	9716	04/18/2012	04/17/2012		
BHM	NCP SALES DEMO	373981	95DST	Standard Billing Statement	2637	04/18/2012	04/16/2012		

Jobs Completed Portlet

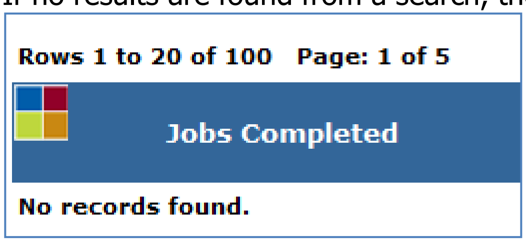
From the **Jobs Completed** screen, the **Job ID** contains a hyperlink which allows the User to click through to the **Job Details** – Option View screen.

By default, the Jobs Completed Portlet contains information for jobs completed in the last 31 days. Users can search for completed jobs outside of the 31 day timeframe by utilizing the search boxes in the Portlet Header. Users can search by:

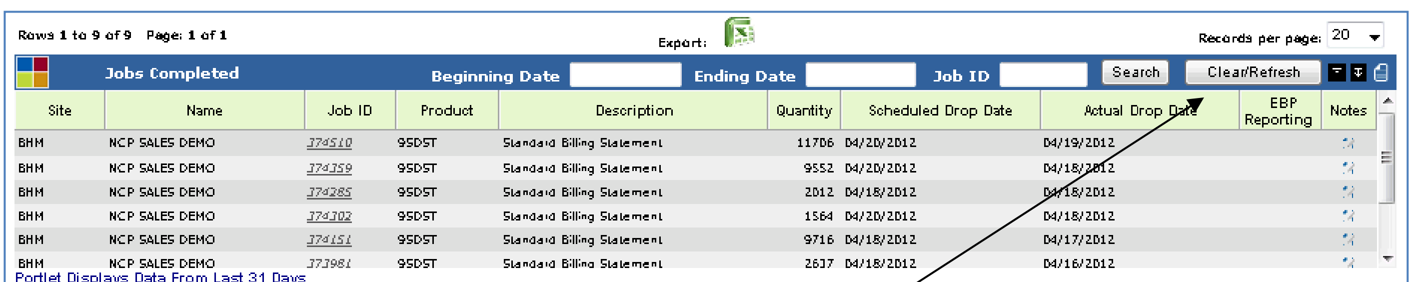
- **Date Range** – When the *Beginning Date* or *Ending Date* search box is clicked, a calendar will appear. Users must utilize the calendars to populate these search boxes. Dates cannot be entered manually. Once a date range is entered, Users must click the Search box.
    - Date Range searches are limited to three years
    - If a User enters a *Beginning Date* and not an *Ending Date*, then the end date will default to current date
    - If User enters an *Ending Date* and not a *Beginning Date*, the following message will display:



    - If no results are found from a search, the following message will display:



- **Job ID** – Job Ids can be manually entered or copied and pasted into the *Job ID* search box



Rows 1 to 9 of 9   Page: 1 of 1   Export: Records per page: 20

Jobs Completed   Beginning Date   Ending Date   Job ID   Search   Clear/Refresh

Site	Name	Job ID	Product	Description	Quantity	Scheduled Drop Date	Actual Drop Date	EBP Reporting	Notes
BHM	NCP SALES DEMO	374510	95DST	Standard Billing Statement	11706	04/20/2012	04/19/2012		
BHM	NCP SALES DEMO	374359	95DST	Standard Billing Statement	9552	04/20/2012	04/18/2012		
BHM	NCP SALES DEMO	374285	95DST	Standard Billing Statement	2012	04/18/2012	04/18/2012		
BHM	NCP SALES DEMO	374302	95DST	Standard Billing Statement	1564	04/20/2012	04/18/2012		
BHM	NCP SALES DEMO	374151	95DST	Standard Billing Statement	9716	04/18/2012	04/17/2012		
BHM	NCP SALES DEMO	373981	95DST	Standard Billing Statement	2637	04/18/2012	04/16/2012		

Portlet Displays Data From Last 31 Days

    - Clicking the Clear/Refresh button at any time will refresh the **Jobs Completed Portlet** to display the last 31 days of data (the default).

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NCP has United States Postal Service (USPS) personnel on-site to verify and accept mailings from our facility. Jobs to be shipped are inserted directly into the USPS mailstream to expedite delivery of items.

Job Details

View Events	Site	File	Tracking ID	Job ID	Product	Option	Description	Status	Quantity	Reject Quantity	Pull Quantity	Received Date	Scheduled Drop Date	Actual Drop Date	Sample
	BHM	600_byte_draft_20120331060340.txt	2007401	372360	95DST	00078895	Standard Billing Statement	Mailed	1012	0	0	03/31/2012 06:08 AM	04/04/2012	04/04/2012	
	BHM	600_byte_draft_20120331060340.txt	2007401	372360	95DST	00078896	Standard Billing Statement	Mailed	9705	0	0	03/31/2012 06:08 AM	04/04/2012	04/04/2012	

Total Rows: 2 - Total Quantity: 10717
Note: The Quantity Hyperlink Will Show Rejects.

Job Details – Option View

From the **Job Details** – Option View screen, the Option ID contains a hyperlink to further break the Job down to the individual Account level details.

Rows 1 to 20 of 9705   Page: 1 of 486   Records per page: 20   Next   Last

Account Details

PDF	View Events	Flag for Pull	Sequence	Job ID	Account Number	Customer Desc	Certified Mail Article #	Printed Address 1	Printed Address 2	Printed Address 3	Printed Address 4	Printed Address 5	Printed Address 6	Original Address 1	Original Address 2	Original Address 3	Original Address 4	Original Address 5	Original Address 6
			1013	372360	0000123290	700		STEVE MOZO	NCP SOLUTIONS	5200 E LAKE BLVD	BIRMINGHAM AL 35217-3546			STEVE MOZO	NCP SOLUTIONS	5200 EAST LAKE BLVD	BIRMINGHAM, AL 35217-1234		
			1014	372360	0000188375	700		EDYTHE ALDECOA	NCP SOLUTIONS	5200 E LAKE BLVD	BIRMINGHAM AL 35217-3546			EDYTHE ALDECOA	NCP SOLUTIONS	5200 EAST LAKE BLVD	BIRMINGHAM, AL 35217-1234		
			1015	372360	0000992031	700		ANDREW ORKIN	NCP SOLUTIONS	5200 E LAKE BLVD	BIRMINGHAM AL 35217-3546			ANDREW ORKIN	NCP SOLUTIONS	5200 EAST LAKE BLVD	BIRMINGHAM, AL 35217-1234		
			1016	372360	0001298784	700		CORALIE KLUBER	NCP SOLUTIONS	5200 E LAKE BLVD	BIRMINGHAM AL 35217-3546			CORALIE KLUBER	NCP SOLUTIONS	5200 EAST LAKE BLVD	BIRMINGHAM, AL 35217-1234		

Account Details Screen

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Reporting

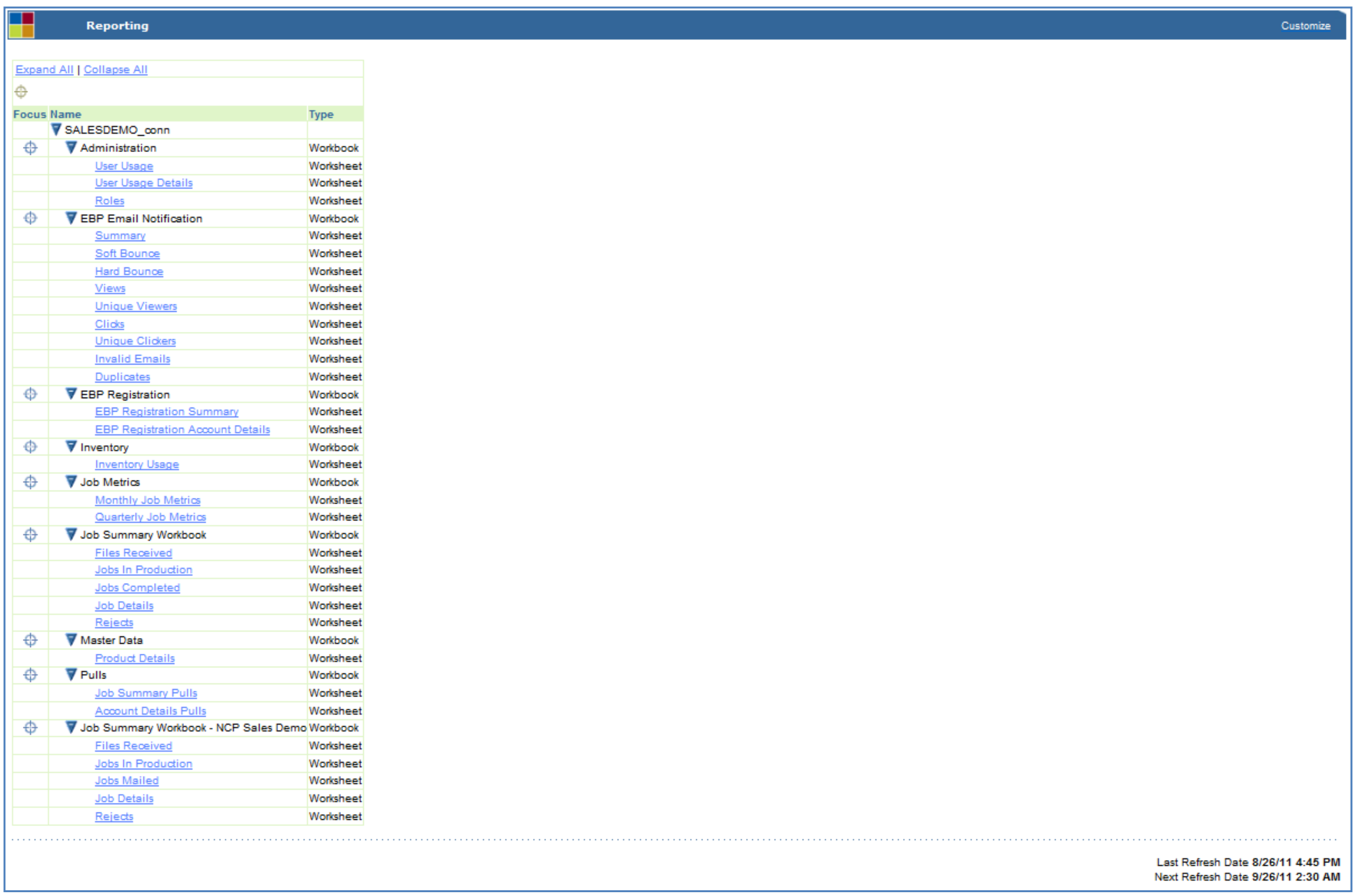
The **Reporting** service provides the User with the ability to create their own custom reports via the **Ad-Hoc Query** and **Report Builder** as well as providing access to numerous pre-configured standard reports. NCP Jacksonville Clients have access to additional reports.

Ad-Hoc Query and Report Builder

Ad-Hoc Query and Report Builder Portlet

The **Ad-Hoc Query** and **Report Builder** module is covered in Portal's Ad-Hoc Reporting Guide and is not covered in this User Guide.

Reporting Portlet



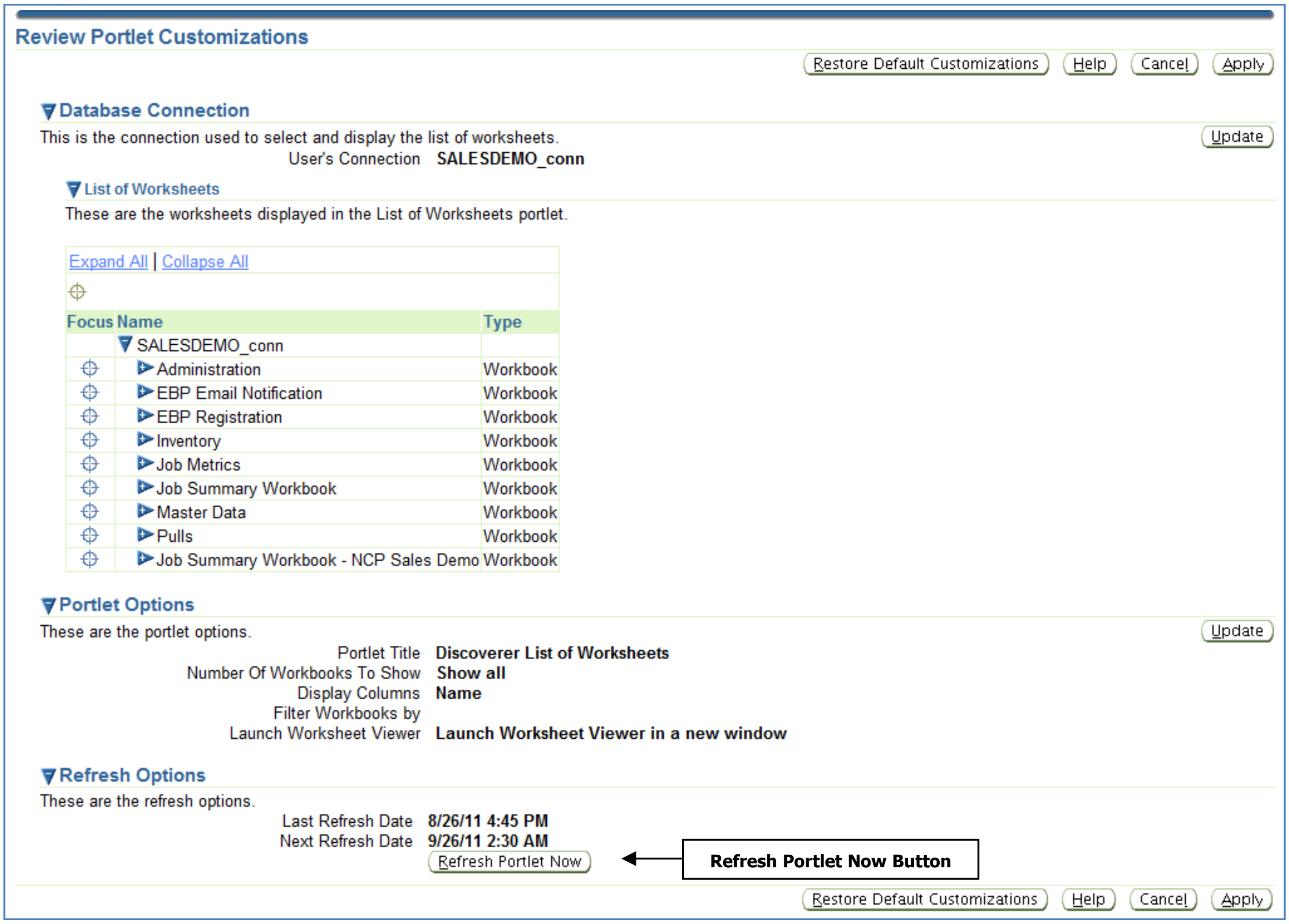
Reporting Portlet Main Screen (NCP Birmingham Clients)

Refresh Reporting Portlet

If a User makes a change to a Report through the **Ad-Hoc Query and Report Builder**, or if NCP releases a new Portal feature, the **Reporting Portlet** will need to be refreshed.

Reporting Portlet

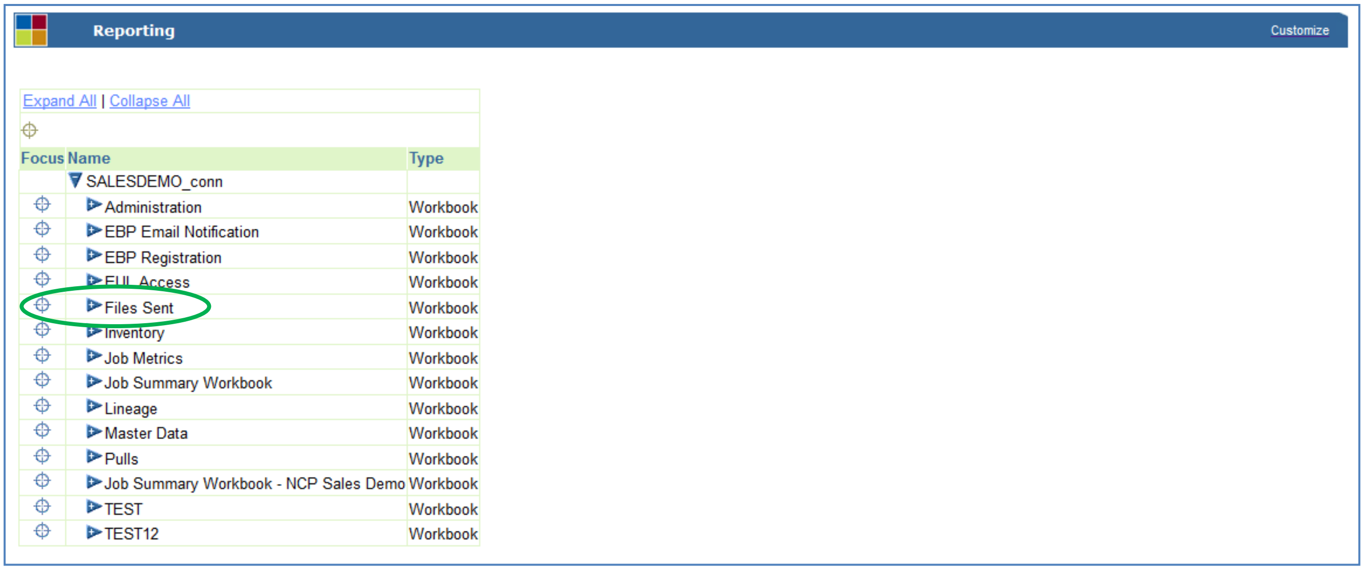
To refresh **the Reporting Portlet**, click the Customize link in the top right corner of the Portlet header



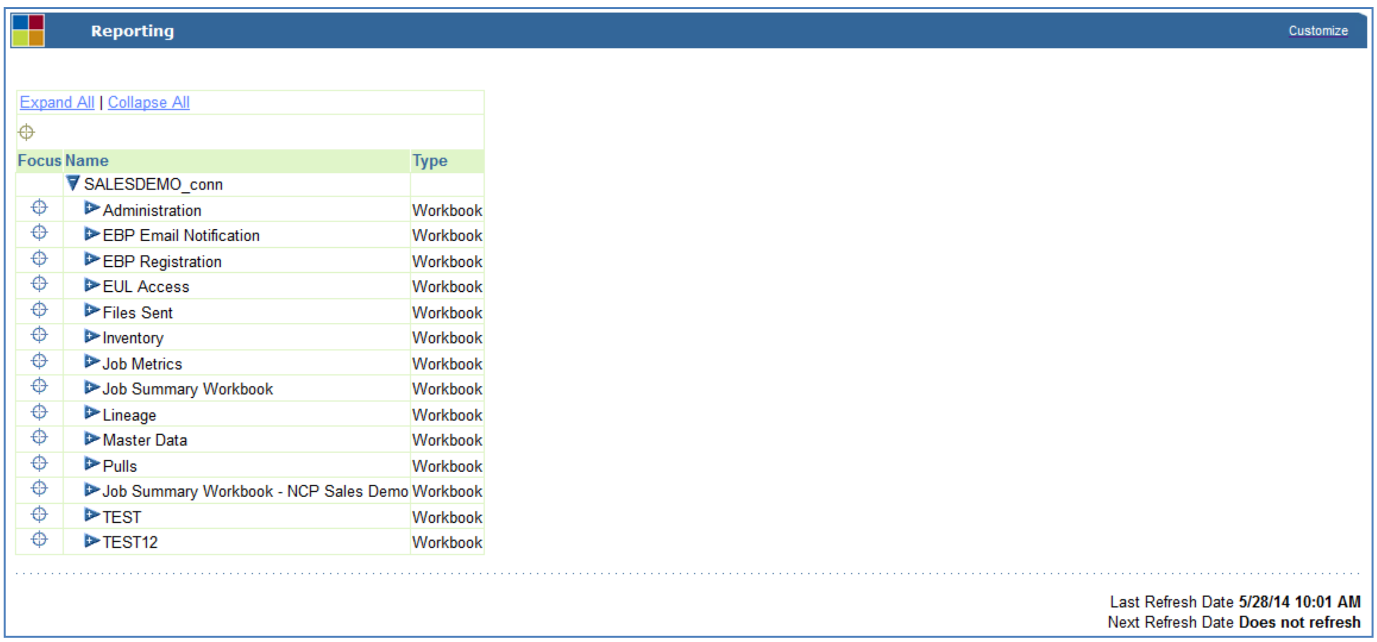
Click the Refresh Portlet Now button

When the **Last Refresh Date** displays the current date and time, click the Apply button.

The newly added Reports/Workbooks will appear in the list.



Expand to view Worksheets



Reports

The **Reporting** Portlet provides the User with a set of pre-configured custom reports (or Worksheets) of the most commonly accessed information within the system. The worksheets are grouped into categories, or Workbooks. To display the Worksheets contained within a Workbook, click the icon to the left of each Workbook name.

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Expand All | Collapse All

Focus	Name	Type
	SALESDEMO_conn	
	Administration	Workbook
	User Usage	Worksheet
	User Usage Details	Worksheet
	Roles	Worksheet
	EBP Email Notification	Workbook
	Summary	Worksheet
	Soft Bounce	Worksheet
	Hard Bounce	Worksheet
	Views	Worksheet
	Unique Viewers	Worksheet
	Clicks	Worksheet
	Unique Clickers	Worksheet
	Invalid Emails	Worksheet
	Duplicates	Worksheet
	EBP Registration	Workbook
	EBP Registration Summary	Worksheet
	EBP Registration Account Details	Worksheet
	EUL Access	Workbook
	Access to EUL's	Worksheet
	Access to Database Objects	Worksheet
	Access Privileges Given On My Objects	Worksheet
	Access Privileges On Other Users Objects	Worksheet
	Files Sent	Workbook
	Files Sent	Worksheet
	Inventory	Workbook
	Inventory Usage	Worksheet
	Job Metrics	Workbook
	Monthly Job Metrics	Worksheet
	Quarterly Job Metrics	Worksheet

Reports – Expanded View

The following standard reports are currently available within the **Reporting** module:

- **Administration**
- **EBP Email Notification**
- **EBP Registration**
- **Files Sent**
- **Inventory**
- **Job Metrics**
- **Job Summary**
- **Master Data**
- **Pulls**

Standard Reports

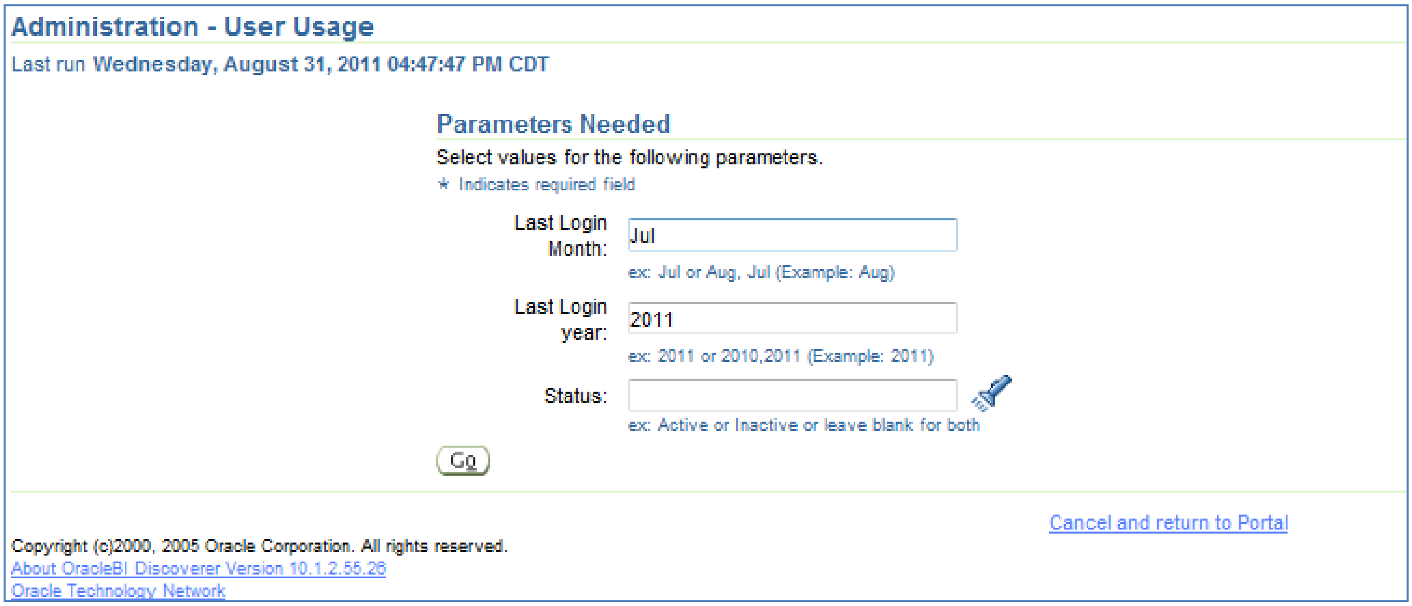
NCP is committed to providing its Clients with the information and resources necessary to improve their business. For that reason, new reports will be added as they are identified. All reports provided in the **Reporting** Portlet are provided as a value-added service to our Clients and are free of charge.

To access and run the available standard reports:

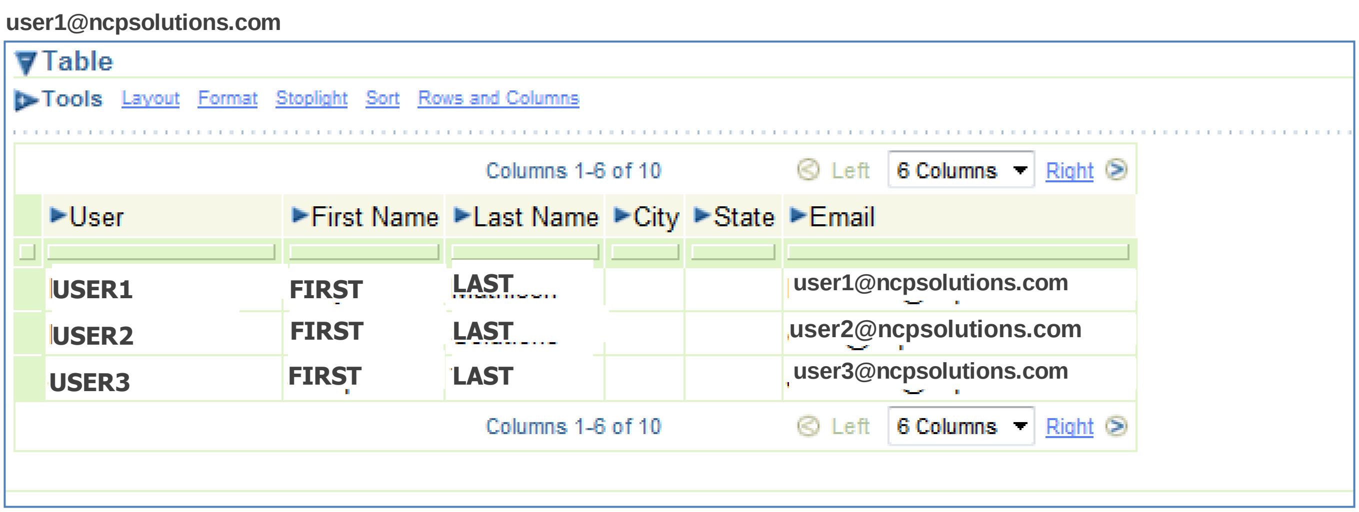
1. From the **Reporting** Portlet, expand the Workbook to list the available reports.
2. Select the desired report to run from the list. (Reports are opened in a new browser window)
3. Based upon the report selected, different values or parameters may be required. Enter the required values or parameters into the available selection fields. Fields marked with an "*"are required fields.
4. Select Go to generate the report.
5. To close out of the report window and return to Portal, click the Cancel and return to Portal link.

Administration Reporting

User Usage



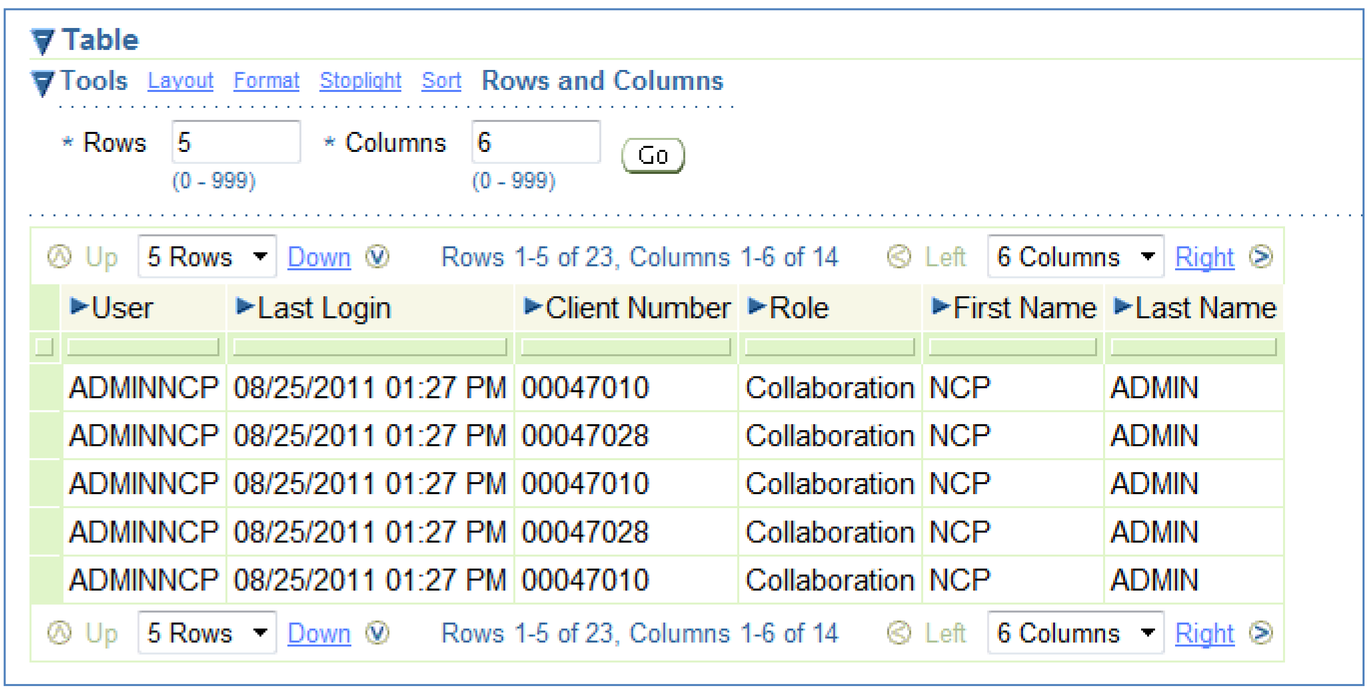
User Usage Selection Screen



User Usage Report

User Usage Details

User Usage Details Selection Screen



User	Last Login	Client Number	Role	First Name	Last Name
ADMINNCP	08/25/2011 01:27 PM	00047010	Collaboration	NCP	ADMIN
ADMINNCP	08/25/2011 01:27 PM	00047028	Collaboration	NCP	ADMIN
ADMINNCP	08/25/2011 01:27 PM	00047010	Collaboration	NCP	ADMIN
ADMINNCP	08/25/2011 01:27 PM	00047028	Collaboration	NCP	ADMIN
ADMINNCP	08/25/2011 01:27 PM	00047010	Collaboration	NCP	ADMIN

User Usage Details Report

Roles

Users are not required to enter parameters for the Roles Report.

Table

Tools Layout Sort **Rows and Columns**

* Rows 10 (0 - 999) * Columns 6 (0 - 999) Go

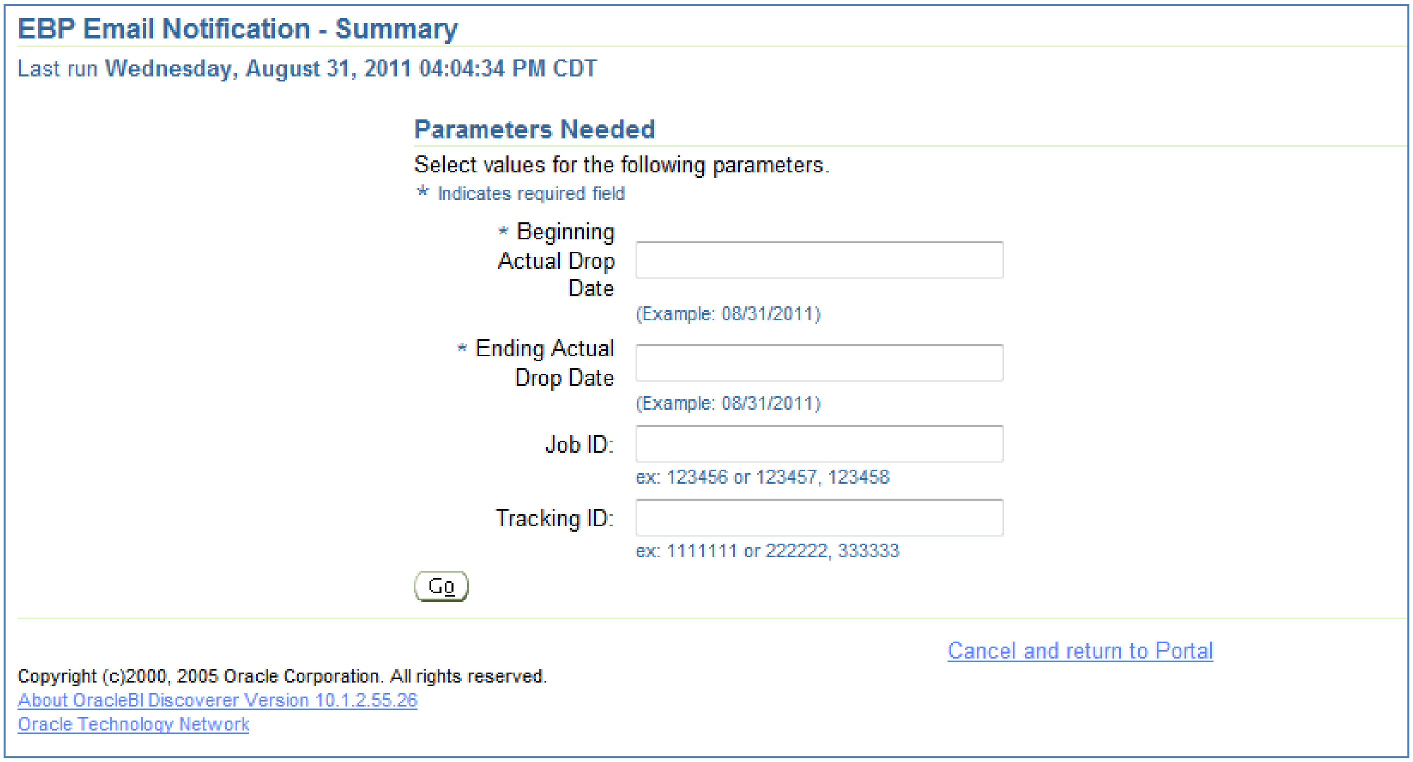
Up 10 Rows Down Rows 1-10 of 31

Client Number	Client	Role	Role Description	Assigned Service
00047010	NCP SALES DEMO	Account Pulls	Account Pulls	Pulls - Pull and Approve
00047010	NCP SALES DEMO	Collaboration	Collaboration	Collaboration - Artwork Exchange
00047010	NCP SALES DEMO	Collaboration	Collaboration	Collaboration - Production Data Upload
00047010	NCP SALES DEMO	Collaboration	Collaboration	Collaboration - Project Information
00047010	NCP SALES DEMO	Collaboration	Collaboration	Collaboration - TEST Data Upload
00047010	NCP SALES DEMO	Dashboard	Dashboard	Dashboard
00047010	NCP SALES DEMO	EBP Client Administrator	EBP Client Administrator	EBP - Client Administration
00047010	NCP SALES DEMO	EBP Reporting	EBP Reporting	EBP - Reporting Portlet
00047010	NCP SALES DEMO	Event History	Event History	View Event History - Admin
00047010	NCP SALES DEMO	Event History	Event History	View Event History - Limited

Up 10 Rows Down Rows 1-10 of 31

Roles Report

EBP Email Notification Reporting



EBP Email Notification - Summary

Last run **Wednesday, August 31, 2011 04:04:34 PM CDT**

Parameters Needed

Select values for the following parameters.

* Indicates required field

* Beginning Actual Drop Date

(Example: 08/31/2011)

* Ending Actual Drop Date

(Example: 08/31/2011)

Job ID:

ex: 123456 or 123457, 123458

Tracking ID:

ex: 1111111 or 222222, 333333

Go

Cancel and return to Portal

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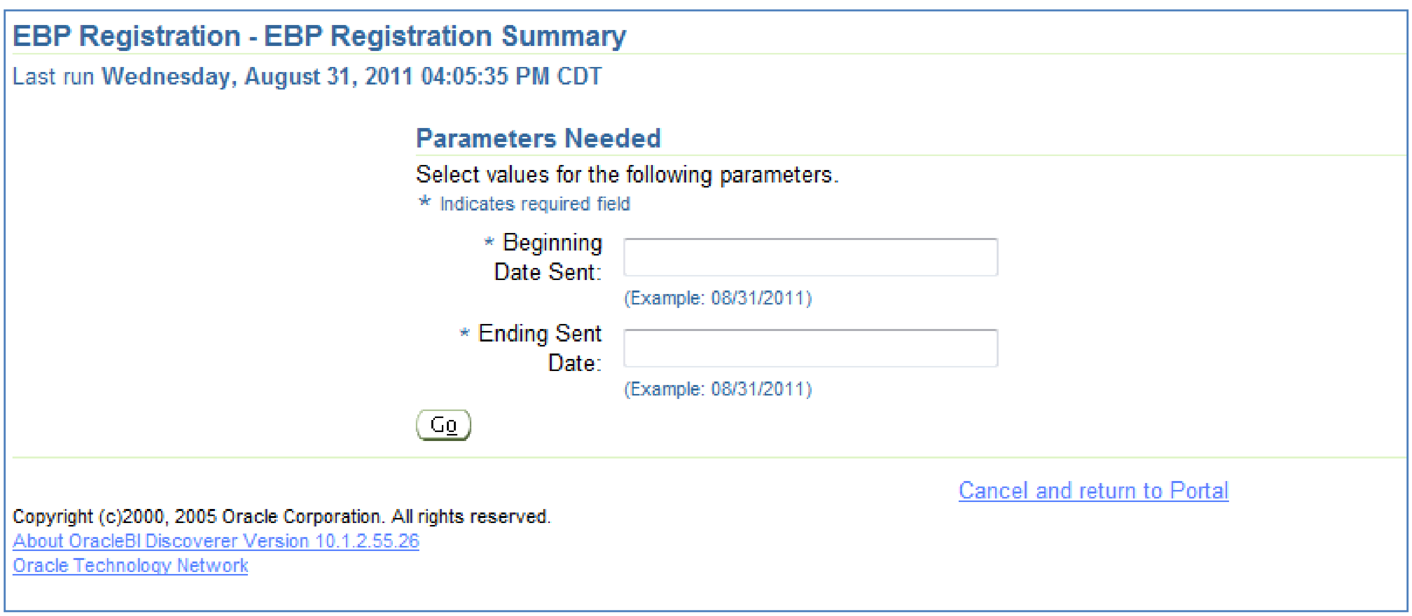
About OracleBI Discoverer Version 10.1.2.55.26

Oracle Technology Network

EBP Email Notification Selection Screen

EBP Registration Reporting



EBP Registration - EBP Registration Summary

Last run **Wednesday, August 31, 2011 04:05:35 PM CDT**

Parameters Needed

Select values for the following parameters.

* Indicates required field

* Beginning Date Sent:

(Example: 08/31/2011)

* Ending Sent Date:

(Example: 08/31/2011)

Go

Cancel and return to Portal

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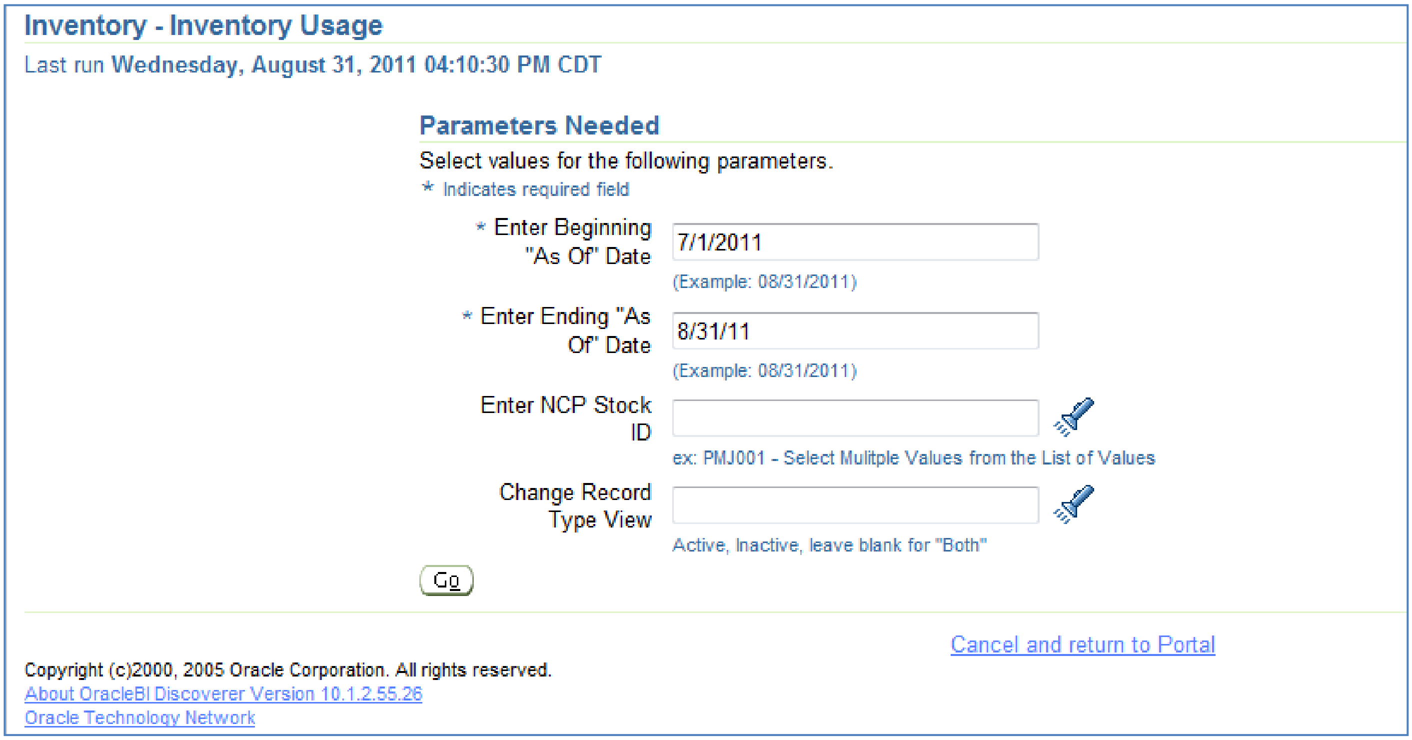
About OracleBI Discoverer Version 10.1.2.55.26

Oracle Technology Network

EBP Registration Reporting Selection Screen

Inventory Reporting

Inventory Usage Report



Inventory - Inventory Usage

Last run **Wednesday, August 31, 2011 04:10:30 PM CDT**

Parameters Needed

Select values for the following parameters.

* Indicates required field

* Enter Beginning "As Of" Date: 7/1/2011
(Example: 08/31/2011)

* Enter Ending "As Of" Date: 8/31/11
(Example: 08/31/2011)

Enter NCP Stock ID:
ex: PMJ001 - Select Mulitple Values from the List of Values

Change Record Type View:
Active, Inactive, leave blank for "Both"

Go

Cancel and return to Portal

About OracleBI Discoverer Version 10.1.2.55.26

Oracle Technology Network

Inventory Usage Selection Screen

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▼Table

▶Tools Layout Format Stoplight Sort Rows and Columns

Up 5 Rows Down Rows 1-25, Columns 1-6 of 16 Left 6 Columns Right

NCP Stock ID	Rev	Cross Reference #	Est. Weight (oz)	Stock Category	Description
BC0064	00A	BC0064	0.000	Backer	NCP White Back Cover 5 up
BC0064	00A	BC0064	0.000	Backer	NCP White Back Cover 5 up
BC0064	00A	BC0064	0.000	Backer	NCP White Back Cover 5 up
BC0064	00A	BC0064	0.000	Backer	NCP White Back Cover 5 up
BC0064	00A	BC0064	0.000	Backer	NCP White Back Cover 5 up
BC0064	00A	BC0064	0.000	Backer	NCP White Back Cover 5 up
BC0064	00A	BC0064	0.000	Backer	NCP White Back Cover 5 up
BC0064	00A	BC0064	0.000	Backer	NCP White Back Cover 5 up
BC0064	00A	BC0064	0.000	Backer	NCP White Back Cover 5 up
BC0064	00A	BC0064	0.000	Backer	NCP White Back Cover 5 up
BC0064	00A	BC0064	0.000	Backer	NCP White Back Cover 5 up
BC0064	00A	BC0064	0.000	Backer	NCP White Back Cover 5 up
BC0064	00A	BC0064	0.000	Backer	NCP White Back Cover 5 up
BC0064	00A	BC0064	0.000	Backer	NCP White Back Cover 5 up
CX0142	00C	CX0142	0.218	Coupon Stock	NCP Green Integrated Label Coupon- 5 up
CX0142	00C	CX0142	0.218	Coupon Stock	NCP Green Integrated Label Coupon- 5 up
CX0142	00C	CX0142	0.218	Coupon Stock	NCP Green Integrated Label Coupon- 5 up
CX0142	00C	CX0142	0.218	Coupon Stock	NCP Green Integrated Label Coupon- 5 up
CX0142	00C	CX0142	0.218	Coupon Stock	NCP Green Integrated Label Coupon- 5 up
CX0142	00C	CX0142	0.218	Coupon Stock	NCP Green Integrated Label Coupon- 5 up
CX0142	00C	CX0142	0.218	Coupon Stock	NCP Green Integrated Label Coupon- 5 up
CX0142	00C	CX0142	0.218	Coupon Stock	NCP Green Integrated Label Coupon- 5 up
CX0142	00C	CX0142	0.218	Coupon Stock	NCP Green Integrated Label Coupon- 5 up
CX0142	00C	CX0142	0.218	Coupon Stock	NCP Green Integrated Label Coupon- 5 up
CX0142	00C	CX0142	0.218	Coupon Stock	NCP Green Integrated Label Coupon- 5 up

Up 5 Rows Down Rows 1-25, Columns 1-6 of 16 Left 6 Columns Right

* Does not include Inventory in Production
** Report data is generated every Friday at midnight

Inventory Usage Report

Job Metrics Reporting

Monthly Job Metrics Report

Job Metrics - Monthly Job Metrics

Last run **Wednesday, August 31, 2011 04:18:44 PM CDT**

Parameters Needed

Select values for the following parameters.

* Indicates required field

* Beginning Mailed Month: Jan
(Example: Aug)

* Begining Mailed Year: 2011
(Example: 2011)

* Ending Mailed Month: Aug
(Example: Aug)

* Ending Mailed Year: 2011
(Example: 2011)

Go

Cancel and return to Portal

About OracleBI Discoverer Version 10.1.2.55.26

Oracle Technology Network

Monthly Job Metrics Selection Screen

Table

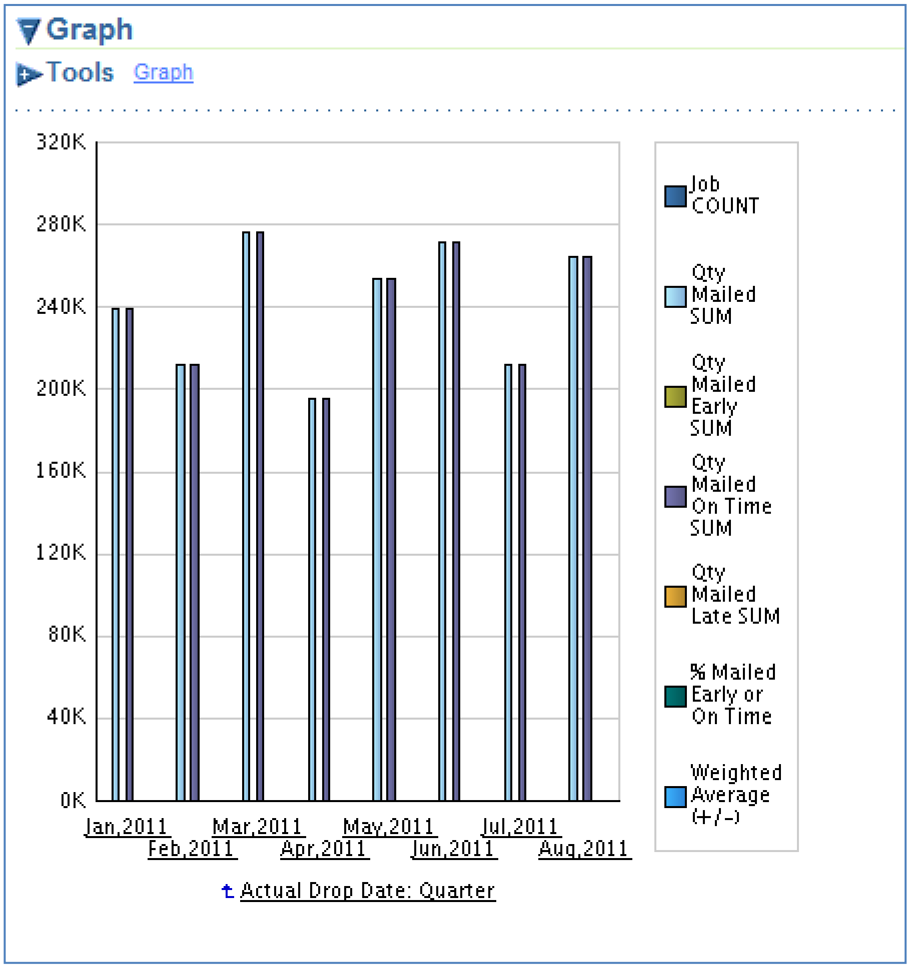
Tools Layout Format Stoplight Sort Rows and Columns

Columns 1-6 of 9 Left 6 Columns Right

Actual Drop Date: Month	Actual Drop Date: Year	Job COUNT	Qty Mailed SUM	Qty Mailed Early SUM	Qty Mailed On Time SUM
Jan	2011	21	238,857	0	238,857
Feb	2011	17	212,116	0	212,116
Mar	2011	23	276,674	0	276,674
Apr	2011	16	195,975	0	195,975
May	2011	25	253,903	0	253,903
Jun	2011	32	271,090	0	271,090
Jul	2011	29	212,332	0	212,332
Aug	2011	31	264,510	0	264,510
		194	**1,925,457**	**0**	**1,925,457**

Columns 1-6 of 9 Left 6 Columns Right

Monthly Job Metrics Data



Monthly Job Metrics Graph

Quarterly Job Metrics Report

Job Metrics - Quarterly Job Metrics

Last run **Wednesday, August 31, 2011 04:30:58 PM CDT**

Parameters Needed

Select values for the following parameters.

* Indicates required field

* Calendar Quarter: Q1

ex: Q1 (Example: Q3)

* Calendar Year: 2011

ex: 2010 (Example: 2011)

Go

Cancel and return to Portal

About OracleBI Discoverer Version 10.1.2.55.26

Oracle Technology Network

Quarterly Job Metrics Selection Screen

Table

Tools Layout Format Stoplight Sort Rows and Columns

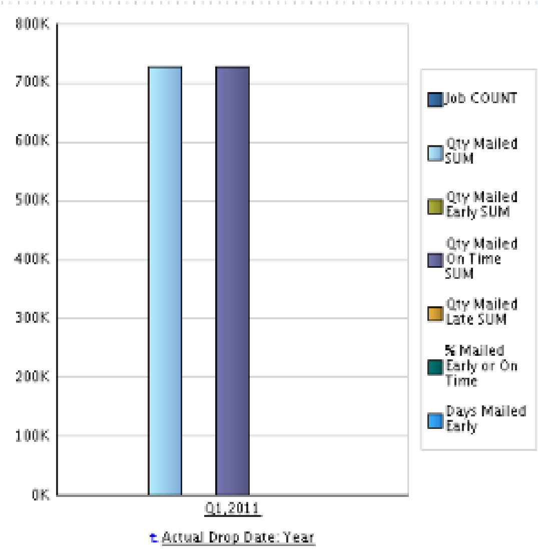
Columns 1-6 of 9 Left 6 Columns Right

Actual Drop Date: Quarter	Actual Drop Date: Year	Job COUNT	Qty Mailed SUM	Qty Mailed Early SUM	Qty Mailed On Time SUM
Q1	2011	61	727,647	0	727,647
		61	**727,647**	**0**	**727,647**

Columns 1-6 of 9 Left 6 Columns Right

Graph

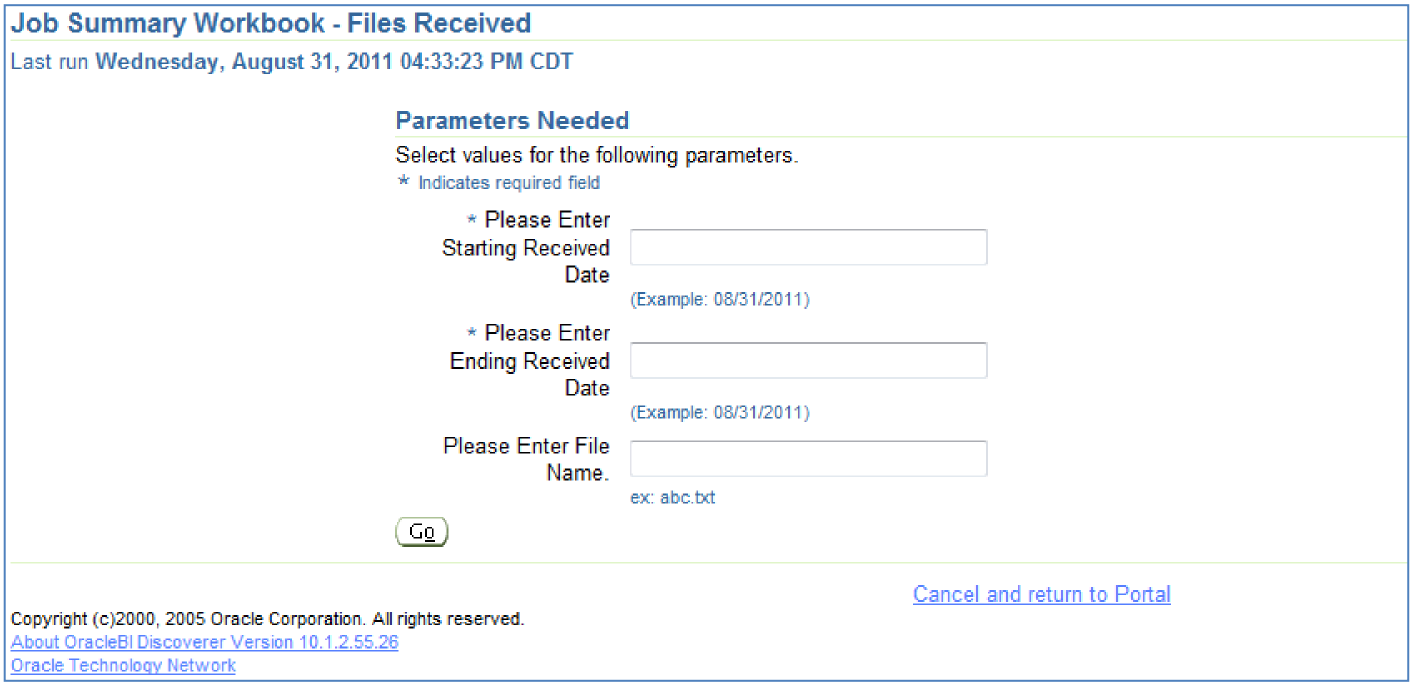
Tools Graph



Quarterly Job Metrics Graph

Job Summary Reporting

Files Received Report


Job Summary Workbook - Files Received

Last run **Wednesday, August 31, 2011 04:33:23 PM CDT**

Parameters Needed

Select values for the following parameters.

* Indicates required field

* Please Enter Starting Received Date

(Example: 08/31/2011)

* Please Enter Ending Received Date

(Example: 08/31/2011)

Please Enter File Name.

ex: abc.txt

Go

Cancel and return to Portal

About OracleBI Discoverer Version 10.1.2.55.26

Oracle Technology Network

Files Received Selection Screen

To view ALL received files within the date range selected, leave the Enter File Name field blank.

Click Go

Jobs In Production Report

The **Jobs In Production** Report lists all Jobs that are currently in the production phase within the workflow system. The report is auto generated by the system and does not require any input from the User.

Table

Tools Layout Format Stoplight Sort Rows and Columns

Columns 1-6 of 9 Left 6 Columns Right

Site	Name	Job ID	Product	Description	Quantity
BHM	NCP SALES DEMO	343207	9SDST	Standard Billing Statement	10640
BHM	NCP SALES DEMO	343551	9SDST	Standard Billing Statement	5702
BHM	NCP SALES DEMO	343229	9SDST	Standard Billing Statement	6802
BHM	NCP SALES DEMO	343412	9SDST	Standard Billing Statement	6841
BHM	NCP SALES DEMO	343251	9SDST	Standard Billing Statement	9396
BHM	NCP SALES DEMO	343208	1T115	Coupon Books - standard green coupon	9471
BHM	NCP SALES DEMO	343552	1T115	Coupon Books - standard green coupon	3894
BHM	NCP SALES DEMO	343230	1T115	Coupon Books - standard green coupon	7718
BHM	NCP SALES DEMO	343413	1T115	Coupon Books - standard green coupon	5670
BHM	NCP SALES DEMO	343252	1T115	Coupon Books - standard green coupon	7080

Columns 1-6 of 9 Left 6 Columns Right

Graph

Tools Graph

Jobs In Production Report

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Jobs Completed Report

Job Summary Workbook - Jobs Completed

Last run **Wednesday, August 31, 2011 04:36:43 PM CDT**

Parameters Needed

Select values for the following parameters.

* Indicates required field

* Beginning Actual Drop Date: 7/1/2011
(Example: 08/31/2011)

* Ending Actual Drop Date: 8/1/2011
(Example: 08/31/2011)

Go

Cancel and return to Portal

About OracleBI Discoverer Version 10.1.2.55.26
Oracle Technology Network

Jobs Completed Selection Screen

Table

Tools Layout Format Stoplight Sort **Rows and Columns**

* Rows 5 (0 - 999) * Columns 6 (0 - 999) Go

Up 5 Rows Down Rows 1-5 of 58, Columns 1-6 of 9 Left 6 Columns Right

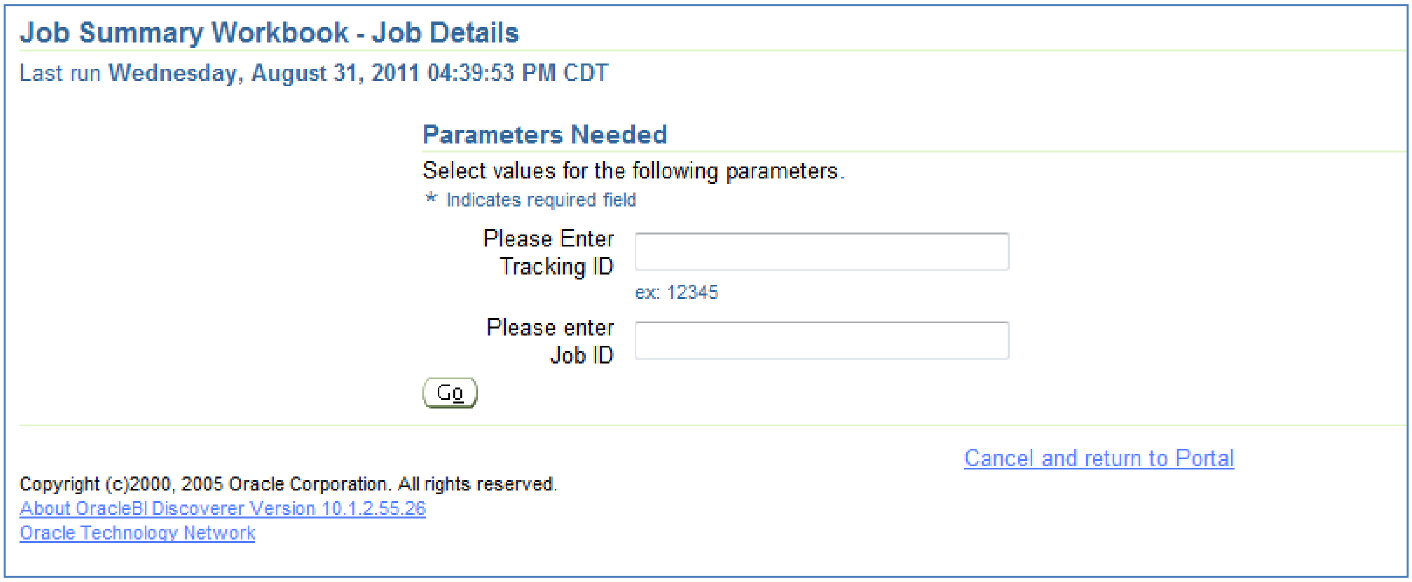
Site	Name	Job ID	Product	Description	Quantity
BHM	NCP SALES DEMO	339602	1T115	Coupon Books - standard green coupon	4802
BHM	NCP SALES DEMO	339601	9SDST	Standard Billing Statement	5431
BHM	NCP SALES DEMO	339472	1T115	Coupon Books - standard green coupon	3054
BHM	NCP SALES DEMO	339471	9SDST	Standard Billing Statement	10413
BHM	NCP SALES DEMO	339354	1T115	Coupon Books - standard green coupon	5267

Up 5 Rows Down Rows 1-5 of 58, Columns 1-6 of 9 Left 6 Columns Right

*** Includes Mailed, Archived, and Completed Job Status**

Jobs Completed Report

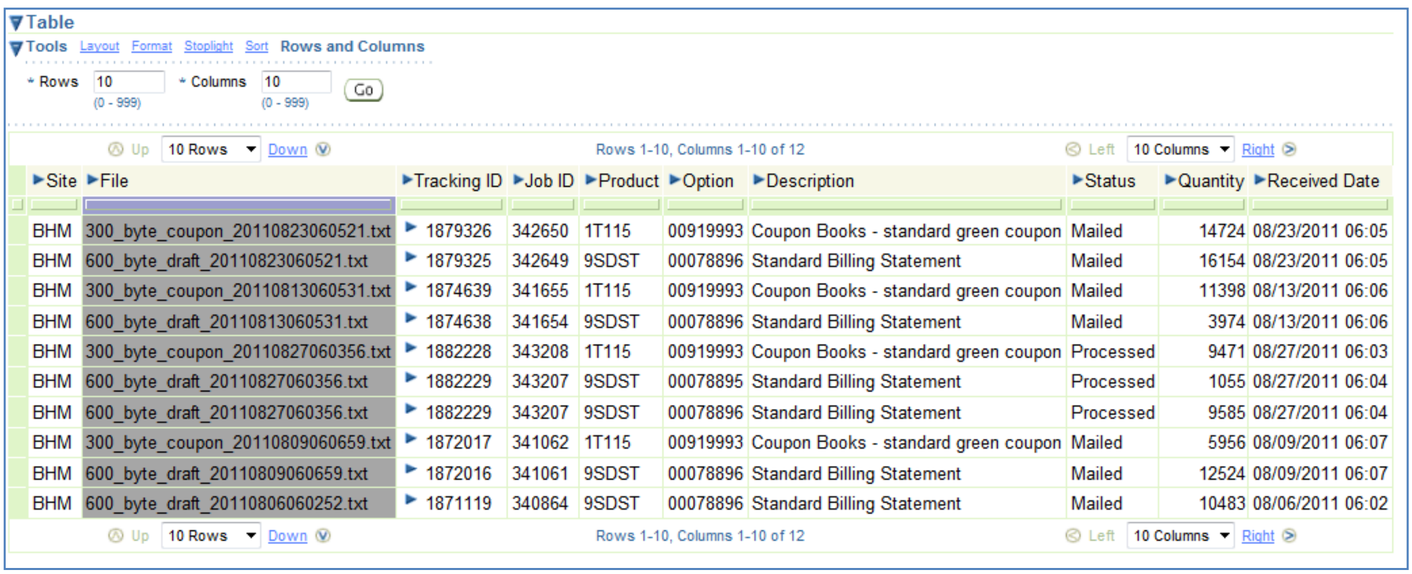
Job Details Report



Job Details Selection Screen

Enter a *Tracking ID* or *Job ID*. Leave fields blank to view all current **Job Details**.

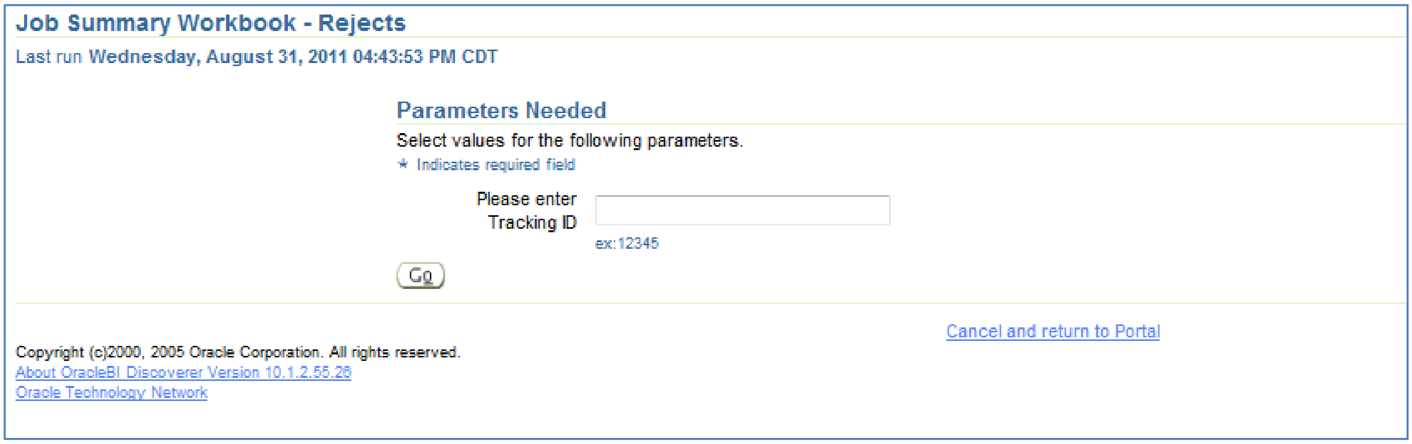
Click Go



Site	File	Tracking ID	Job ID	Product	Option	Description	Status	Quantity	Received Date
BHM	300_byte_coupon_20110823060521.txt	1879326	342650	1T115	00919993	Coupon Books - standard green coupon	Mailed	14724	08/23/2011 06:05
BHM	600_byte_draft_20110823060521.txt	1879325	342649	9SDST	00078896	Standard Billing Statement	Mailed	16154	08/23/2011 06:05
BHM	300_byte_coupon_20110813060531.txt	1874639	341655	1T115	00919993	Coupon Books - standard green coupon	Mailed	11398	08/13/2011 06:06
BHM	600_byte_draft_20110813060531.txt	1874638	341654	9SDST	00078896	Standard Billing Statement	Mailed	3974	08/13/2011 06:06
BHM	300_byte_coupon_20110827060356.txt	1882228	343208	1T115	00919993	Coupon Books - standard green coupon	Processed	9471	08/27/2011 06:03
BHM	600_byte_draft_20110827060356.txt	1882229	343207	9SDST	00078895	Standard Billing Statement	Processed	1055	08/27/2011 06:04
BHM	600_byte_draft_20110827060356.txt	1882229	343207	9SDST	00078896	Standard Billing Statement	Processed	9585	08/27/2011 06:04
BHM	300_byte_coupon_20110809060659.txt	1872017	341062	1T115	00919993	Coupon Books - standard green coupon	Mailed	5956	08/09/2011 06:07
BHM	600_byte_draft_20110809060659.txt	1872016	341061	9SDST	00078896	Standard Billing Statement	Mailed	12524	08/09/2011 06:07
BHM	600_byte_draft_20110806060252.txt	1871119	340864	9SDST	00078896	Standard Billing Statement	Mailed	10483	08/06/2011 06:02

Job Details Report

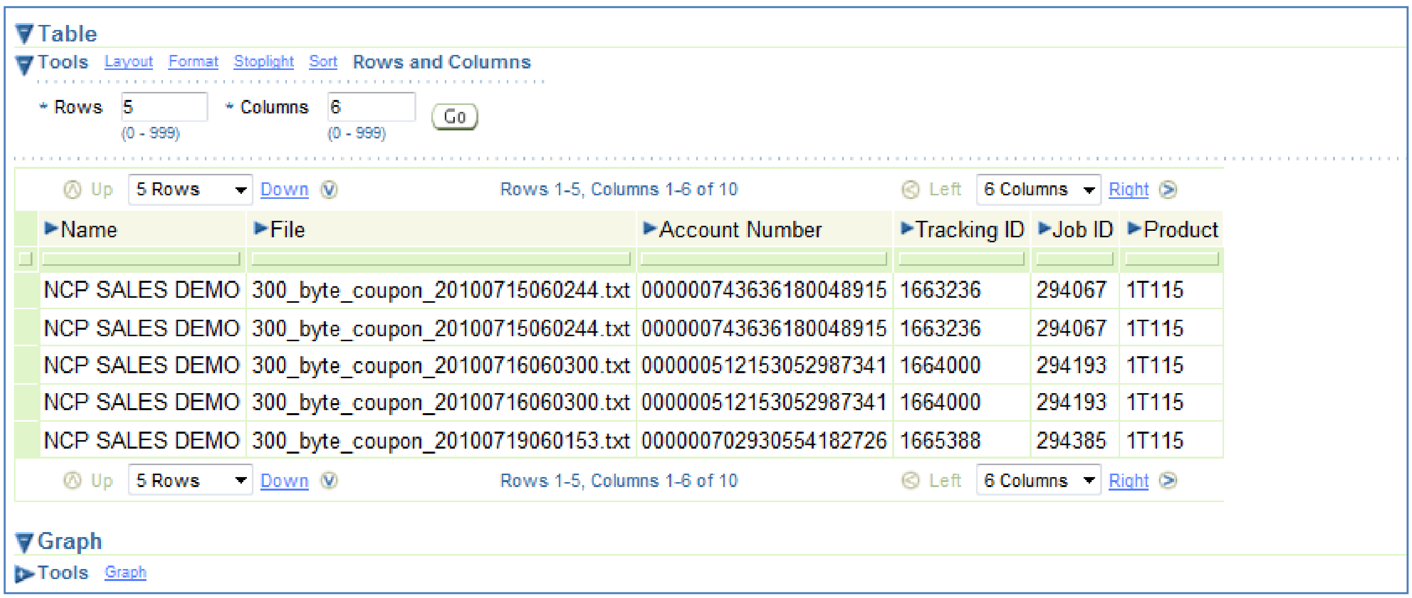
Rejects Report



Rejects Selection Screen

Enter a *Tracking ID* to view rejects or leave blank to view all rejects for all **Tracking IDs**.

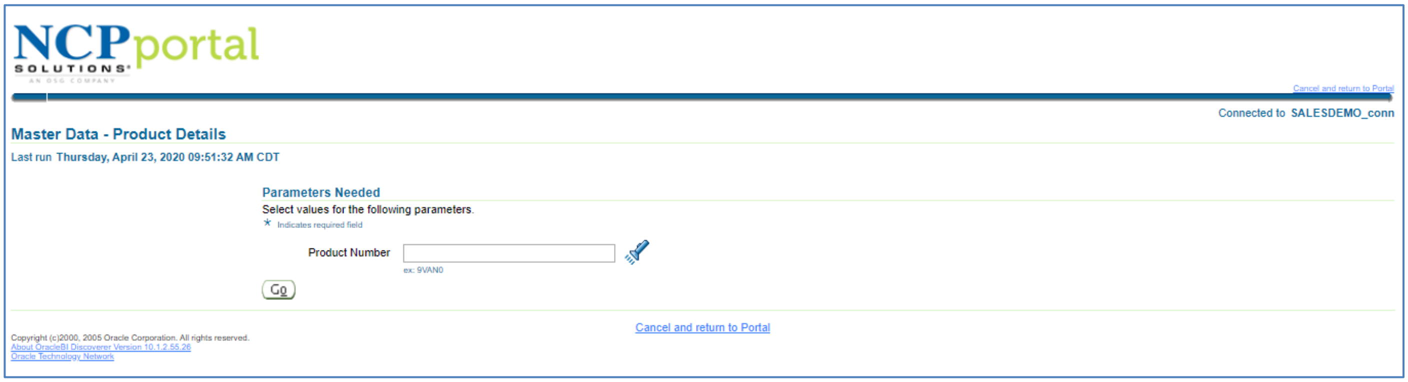
Click Go



Name	File	Account Number	Tracking ID	Job ID	Product
NCP SALES DEMO	300_byte_coupon_20100715060244.txt	000000743636180048915	1663236	294067	1T115
NCP SALES DEMO	300_byte_coupon_20100715060244.txt	000000743636180048915	1663236	294067	1T115
NCP SALES DEMO	300_byte_coupon_20100716060300.txt	000000512153052987341	1664000	294193	1T115
NCP SALES DEMO	300_byte_coupon_20100716060300.txt	000000512153052987341	1664000	294193	1T115
NCP SALES DEMO	300_byte_coupon_20100719060153.txt	000000702930554182726	1665388	294385	1T115

Master Data Reporting

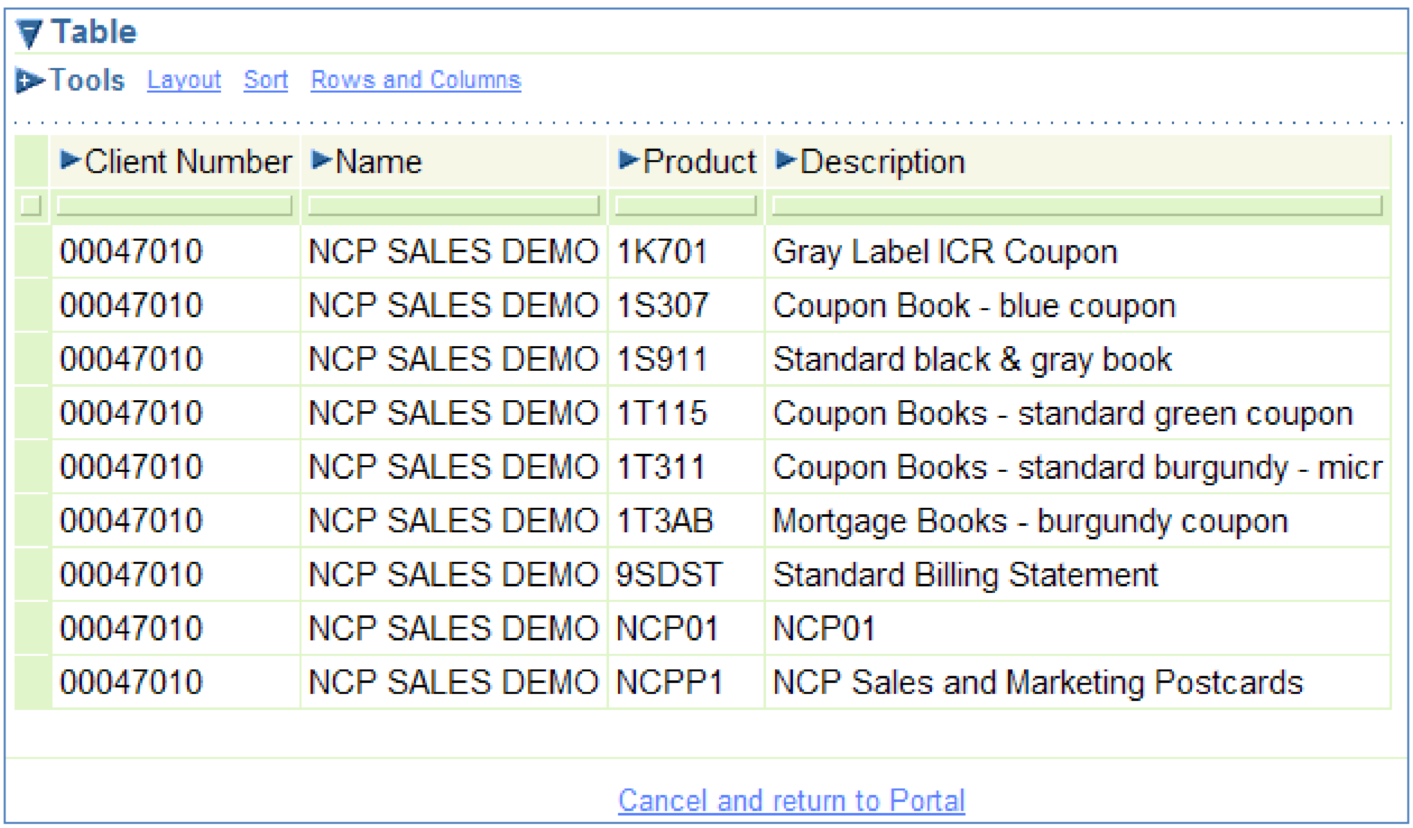
Product Details Report



Product Details Selection Screen

Enter a specific *Product Number* or leave blank to view all **Products**.

Click Go



Table

Tools Layout Sort Rows and Columns

Client Number	Name	Product	Description
00047010	NCP SALES DEMO	1K701	Gray Label ICR Coupon
00047010	NCP SALES DEMO	1S307	Coupon Book - blue coupon
00047010	NCP SALES DEMO	1S911	Standard black & gray book
00047010	NCP SALES DEMO	1T115	Coupon Books - standard green coupon
00047010	NCP SALES DEMO	1T311	Coupon Books - standard burgundy - micr
00047010	NCP SALES DEMO	1T3AB	Mortgage Books - burgundy coupon
00047010	NCP SALES DEMO	9SDST	Standard Billing Statement
00047010	NCP SALES DEMO	NCP01	NCP01
00047010	NCP SALES DEMO	NCPP1	NCP Sales and Marketing Postcards

Cancel and return to Portal

Product Details Report

Job Summary Pulls Reports

NCP portal

Save and return to Portal | Cancel and return to Portal | Help

Connected to **SALESDEMO_conn**

Pulls - Job Summary Pulls

Last run **Wednesday, March 23, 2011 03:30:09 PM CDT**

Parameters Needed

Select values for the following parameters.

* Indicates required field

* Start Received Date	03/01/2011	(Example: 03/23/2011)
Ending Received Date		(Example: 03/23/2011)
Job ID		ex: 123456 or: 123456, 123232
Tracking ID		ex: 1234 or 1234,1256

Go

Save and return to Portal | Cancel and return to Portal | Help

About OracleBI Discoverer Version 10.1.2.55.26

Oracle Technology Network

Table

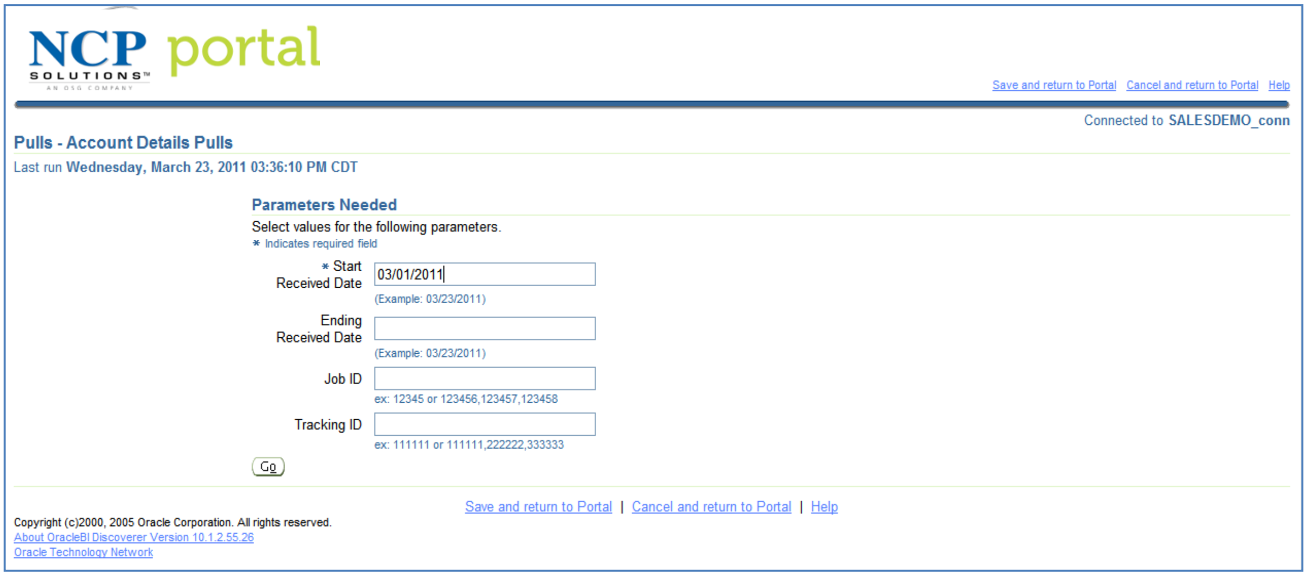
Tools Layout Format Stoplight Sort Rows and Columns

Columns 1-6 of 11 — Left | 6 Columns | Right

Received Date	Tracking Id	Job Id	Product	Quantity Before Rejects And Pulls	Quantity Pulled
03/04/2011 09:43 AM	1002211	101857	9SDST	1,454	4
03/04/2011 09:42 AM	1002210	101858	9SDST	1,458	5
03/11/2011 11:25 AM	1002356	101922	9SDST	7,887	4
03/11/2011 11:27 AM	1002358	101924	9SDST	2,002	10
03/11/2011 11:32 AM	1002359	101925	9SDST	30,544	8
03/14/2011 11:41 AM	1002379	101945	9SDST	585	585
03/14/2011 11:40 AM	1002378	101946	9SDST	28,320	6
03/15/2011 08:19 AM	1002402	101951	9SDST	23,460	4,698
03/15/2011 08:18 AM	1002401	101952	9SDST	9,384	5
03/15/2011 08:17 AM	1002400	101953	9SDST	9,384	3
03/15/2011 08:10 AM	1002399	101954	9SDST	28,152	18
03/21/2011 09:38 AM	1002424	102012	9SDST	7,180	3
03/22/2011 09:16 AM	1002438	102047	9SDST	11,069	10
03/22/2011 09:13 AM	1002437	102048	9SDST	21,722	3

Columns 1-6 of 11 — Left | 6 Columns | Right

Account Details Pulls Reports



NCP portal

Save and return to Portal | Cancel and return to Portal | Help

Connected to SALESDEMO_conn

Pulls - Account Details Pulls

Last run **Wednesday, March 23, 2011 03:36:10 PM CDT**

Parameters Needed

Select values for the following parameters.

* Indicates required field

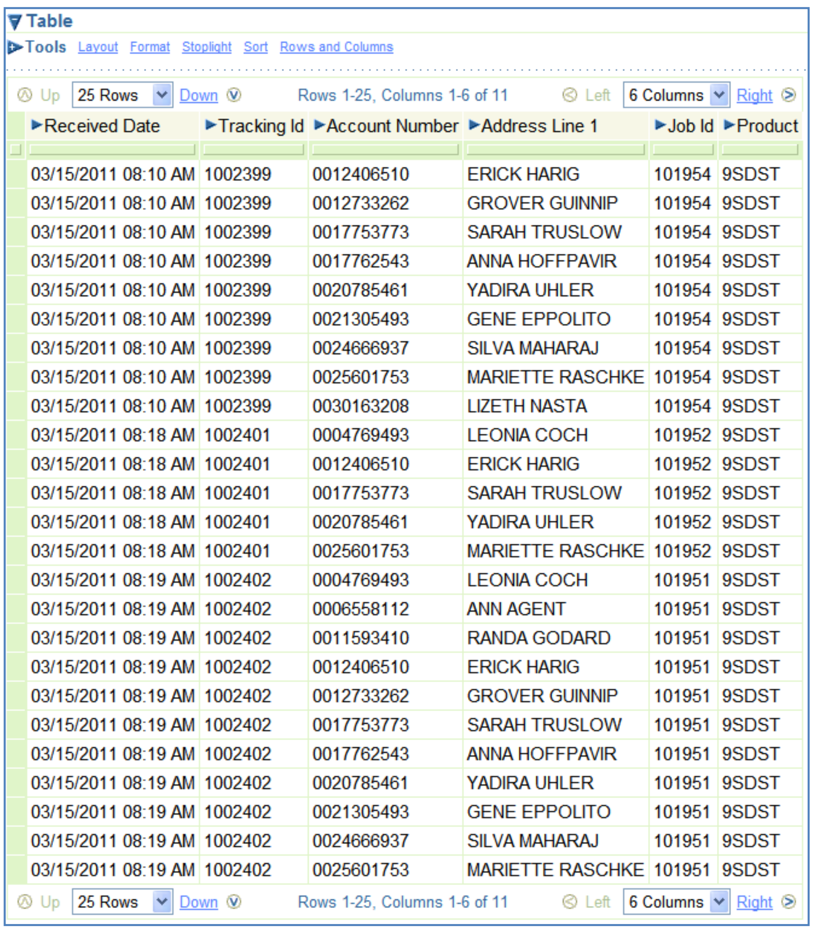
* Start Received Date	03/01/2011 (Example: 03/23/2011)
Ending Received Date	(Example: 03/23/2011)
Job ID	ex: 12345 or 123456,123457,123458
Tracking ID	ex: 111111 or 111111,222222,333333

Go

Save and return to Portal | Cancel and return to Portal | Help

About OracleBI Discoverer Version 10.1.2.55.26

Oracle Technology Network



Table

Tools Layout Format Stoplight Sort Rows and Columns

Up 25 Rows Down Rows 1-25, Columns 1-6 of 11 Left 6 Columns Right

Received Date	Tracking Id	Account Number	Address Line 1	Job Id	Product
03/15/2011 08:10 AM	1002399	0012406510	ERICK HARIG	101954	9SDST
03/15/2011 08:10 AM	1002399	0012733262	GROVER GUINNIP	101954	9SDST
03/15/2011 08:10 AM	1002399	0017753773	SARAH TRUSLOW	101954	9SDST
03/15/2011 08:10 AM	1002399	0017762543	ANNA HOFFPAVIR	101954	9SDST
03/15/2011 08:10 AM	1002399	0020785461	YADIRA UHLER	101954	9SDST
03/15/2011 08:10 AM	1002399	0021305493	GENE EPPOLITO	101954	9SDST
03/15/2011 08:10 AM	1002399	0024666937	SILVA MAHARAJ	101954	9SDST
03/15/2011 08:10 AM	1002399	0025601753	MARIETTE RASCHKE	101954	9SDST
03/15/2011 08:10 AM	1002399	0030163208	LIZETH NASTA	101954	9SDST
03/15/2011 08:18 AM	1002401	0004769493	LEONIA COCH	101952	9SDST
03/15/2011 08:18 AM	1002401	0012406510	ERICK HARIG	101952	9SDST
03/15/2011 08:18 AM	1002401	0017753773	SARAH TRUSLOW	101952	9SDST
03/15/2011 08:18 AM	1002401	0020785461	YADIRA UHLER	101952	9SDST
03/15/2011 08:18 AM	1002401	0025601753	MARIETTE RASCHKE	101952	9SDST
03/15/2011 08:19 AM	1002402	0004769493	LEONIA COCH	101951	9SDST
03/15/2011 08:19 AM	1002402	0006558112	ANN AGENT	101951	9SDST
03/15/2011 08:19 AM	1002402	0011593410	RANDA GODARD	101951	9SDST
03/15/2011 08:19 AM	1002402	0012406510	ERICK HARIG	101951	9SDST
03/15/2011 08:19 AM	1002402	0012733262	GROVER GUINNIP	101951	9SDST
03/15/2011 08:19 AM	1002402	0017753773	SARAH TRUSLOW	101951	9SDST
03/15/2011 08:19 AM	1002402	0017762543	ANNA HOFFPAVIR	101951	9SDST
03/15/2011 08:19 AM	1002402	0020785461	YADIRA UHLER	101951	9SDST
03/15/2011 08:19 AM	1002402	0021305493	GENE EPPOLITO	101951	9SDST
03/15/2011 08:19 AM	1002402	0024666937	SILVA MAHARAJ	101951	9SDST
03/15/2011 08:19 AM	1002402	0025601753	MARIETTE RASCHKE	101951	9SDST

Up 25 Rows Down Rows 1-25, Columns 1-6 of 11 Left 6 Columns Right

Invoices

The **Invoices** Service provides the User with an online 13 month rolling history of all NCP invoices. The invoices are presented as a PDF file for viewing and for download.

- A rolling 6-month history of production details associated with a corresponding invoice is available through Portal. To access this data, click on the Invoice Number hyperlink.
- Production history for **Jobs Completed** over the rolling 6-month history can be obtained through the **Reporting Module** or through Client Services.
- The **Invoices** Service is assigned during the initial setup of Portal by NCP.
- Access to this service is configurable at the User level by the Client Administrator.

Invoices

Site	Billing Client Number	Invoice Description	Invoice Number	Invoice Date	PDF	Spreadsheet Download	View Events
BHM	98059805	Invoices	455556	10/19/2011			
BHM	67016701	Invoices	455557	10/19/2011			
BHM	98059805	Invoices	455535	10/12/2011			
BHM	67016701	Invoices	455536	10/12/2011			
BHM	98059805	Invoices	455519	10/05/2011			
BHM	67016701	Invoices	455520	10/05/2011			
BHM	98059805	Invoices	455521	10/05/2011			
BHM	67016701	Invoices	455522	10/05/2011			
BHM	98059805	Invoices	454189	09/30/2011			
BHM	67016701	Invoices	454190	09/30/2011			
BHM	98059805	Invoices	453408	09/27/2011			

Portlet Displays A Maximum Of 13 Rolling Months Of Invoice Data.

Invoices Portlet

Click on the Invoice Number hyperlink to display details concerning that invoice, including the **Job ID**, **Products**, and **Quantities**.

Click on the PDF icon associated with an Invoice Number to view an actual copy of the invoice.

Click on the Spreadsheet Download icon to import Invoice data directly into Microsoft Excel.

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Inventory

Many NCP Clients have custom stock (shells) that are produced in an offset (pre-press) environment. These stocks are either produced by NCP or supplied to NCP by the Client.

The primary purpose of the **Inventory** Service is to provide the Client with access to information concerning "quantity on hand" and other key information essential to ensuring that manufacturing does not run out of stock on needed materials and to reduce the obsolescence of stock items.

The Inventory Service contains the following Portlets:

1. NCP Supplied Stock
2. Client Supplied Stock (if applicable)
3. Inventory Usage Report

Inventory is accessed via Portal's Main Service Toolbar. The **NCP Supplied Stock** Portlet allows the User to select Active, Inactive, or All Items to view via the "Items to Include" dropdown list.

Data can be sorted in ascending or descending order by clicking on any of the Portlet Data Headers.

My List | Document Archives | Dashboard | Reporting | Invoices | Inventory | Review & Release | Account Pulls | EBP Management | Collaboration | Mail Tracking | Files Sent

Items to Include: Active Only

NCP Supplied Stock *As of 10/26/2012 11:59 PM

NCP Stock ID	Rev	Cross Reference #	Est. Weight (oz.)	Stock Category	Description	*Qty on Hand	Unit of Measure (UOM)	Products per UOM	Re-Order Level	Date of Last Use	Sample	Event Log	Add Note
BC0064	00A	BC0064	0	Backer	NCP White Back Cover 5 up	0	Sheet	5	140,000	09/04/2012			
CX0142	00C	CX0142	0.218	Coupon Stock	NCP Green Integrated Label Coupon- 5 up	85,500	Sheet	5	1,000,000	10/17/2012			

*Does not include inventory in Production

Client Supplied Stock *As of 10/26/2012 11:59 PM

NCP Stock ID	Rev	Cross Reference #	Est. Weight (oz.)	Stock Category	Description	*Qty on Hand	Unit of Measure (UOM)	Products per UOM	Last Qty Received	Last Shipment Received	Sample	Event Log	Add Note
FC0075	00C	FC0075	0	Front Cover	NCP Green Front Cover- 5 up	20,780	Sheet	5	316,740	03/07/2012			
PM0030	00F	PM0030 (E 127)	0	Mailer Envelope	NCP Coupon Book Mailer 1-24 pays- single window- 1st class- ASR endorsement	0	Each	1	88,381,300	01/13/2011			
PM1822	00C	PM1822	0.182	Mailer Envelope	NCP #10 Mailer w/ Large Window (BAW)- 1st class- ASR endorsement- inside tint	1,504,341	Each	1	163,924,386	10/18/2012			
PR1732	000	PR 1732	0.136	Return Envelope	NCP #9 Return- double window- inside tint	1,573,319	Each	1	453,900,996	10/25/2012			
SX0114	00B	SX0114 (XP 1177)	0.252	Statement Stock Sheeted	NCP Blue Billing Statement 8 1/2 x 14- ALT SC0074- perf 3 3/4" from bottom- 24# 1 up	0	Sheet	1	7,073,820	04/19/2011			
XI0073	00B	XI0073	0	Insert	NCP White Insert Stock- perf 1/4" from left- 5 Up	0	Sheet	5	20,618,000	09/11/2012			

*Does not include inventory in Production

Inventory Portlets showing Active Items

NCP
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NCP Supplied Stock

Inventory "As of" date

NCP Supplied Stock   *As of 10/26/2012 11:59 PM

NCP Stock ID	Rev	Cross Reference #	Est. Weight (oz.)	Stock Category	Description	*Qty on Hand	Unit of Measure (UOM)	Products per UOM	Re-Order Level	Date of Last Use	Sample	Event Log	Add Note
BC0064	00A	BC0064	0	Backer	NCP White Back Cover 5 up	0	Sheet	5	140,000	09/04/2012			
CX0142	00C	CX0142	0.218	Coupon Stock	NCP Green Integrated Label Coupon- 5 up	85,500	Sheet	5	1,000,000	10/17/2012			

NCP Supplied Stock Portlet (Active Items)

The **NCP Supplied Stock** Portlet provides the following inventory information:

- **NCP Stock ID** contains the **Item** Number associated with each inventory item.
- **Rev** displays the current item revision. Revisions start at 000 and are incremented alphabetically (000, 00A, 00B, etc.).
- **Cross Reference #** displays the legacy NCP Stock ID for each item.
- **Est. Weight** provides the estimated weight (in ounces) of a single Unit of Measure (UOM) of each item.
- **Stock Category** displays the category that is assigned to each item.
- **Description** is a detailed description of each item.
- **Qty on Hand (QOH)** is the total number of pieces that are currently available for use in production.
  - Inventory quantities shown are based upon the "As of" date displayed in the Portlet header.
  - Inventory quantities displayed in **red** indicate that the QOH is less than or equal to 105% of the Re-Order quantity.
- **Unit of Measure (UOM)** displays the unit type by which the quantity is calculated.
- **Products per UOM** indicates how many items can be produced from each single unit.
- **Re-Order Level** is the level in which stock should be re-ordered when quantity on hand falls below the limit that is set in the system.
- **Date of Last Use** is the last date that an item was pulled from inventory to fulfill a job order.
- The **Sample** column contains a PDF icon that, if enabled, can be selected to display a 150 dpi image of the item. PDF images will be of the entire item. For example, if the item is a 5-up coupon stock sheet, then the PDF image will contain a 5-up image of the entire sheet.
- **Event Log** displays an icon that will provide a log showing access to the inventory module and viewing of PDF images.
- **Add Note**

Client Supplied Stock

Client Supplied Stock *As of 10/26/2012 11:59 PM

NCP Stock ID	Rev	Cross Reference #	Est. Weight (oz.)	Stock Category	Description	*Qty on Hand	Unit of Measure (UOM)	Products per UOM	Last Qty Received	Last Shipment Received	Sample	Event Log	Add Note
FC0075	00C	FC0075	0	Front Cover	NCP Green Front Cover- 5 up	20,780	Sheet	5	316,740	03/07/2012			
PM0030	00F	PM0030 (E 127)	0	Mailer Envelope	NCP Coupon Book Mailer 1-24 pays- single window- 1st class- ASR endorsement	0	Each	1	88,381,300	01/13/2011			
PM1822	00C	PM1822	0.182	Mailer Envelope	NCP #10 Mailer w/ Large Window (BAW)- 1st class- ASR endorsement- inside tint	1,504,341	Each	1	163,924,386	10/18/2012			
PR1732	000	PR 1732	0.136	Return Envelope	NCP #9 Return- double window- inside tint	1,573,319	Each	1	453,900,996	10/25/2012			
SX0114	00B	SX0114 (XP 1177)	0.252	Statement Stock Sheeted	NCP Blue Billing Statement 8 1/2 x 14- ALT SC0074- perf 3 3/4" from bottom- 24# 1 up	0	Sheet	1	7,073,820	04/19/2011			
XI0073	00B	XI0073	0	Insert	NCP White Insert Stock- perf 1/4" from left- 5 Up	0	Sheet	5	20,618,000	09/11/2012			

*Does not include inventory in Production

Client Supplied Stock Portlet (Active Items)

The **Client Supplied Stock** Portlet is only displayed if the Client supplies stock items to NCP. The **Client Supplied Stock** Portlet provides the same information as the **NCP Supplied Stock** Portlet with the exception of:

- **Last Qty Received** contains the total quantity of items received by NCP from the Client.
- **Last Shipment Date** displays the date that the latest shipment of stock was received by NCP from the Client.
- **Re-Order Level** amount can be displayed by placing your mouse over the "Qty on Hand" value for each item.

**** The "Qty on Hand," "Re-Order Level," and "Last Qty Received" values are based upon the "product or sheet" quantity. A single 2-up "sheet" can produce two statements per page. A single 5-up coupon "sheet" can produce five coupon books. The quantities reflected, in most cases, reflect the number of products that can be produced.*

**** Inventory that has been pulled for use in production is not reflected in quantities shown.*

For detail on the **Add Note** feature, please refer to the **Add Note** section of this document or click here (if viewing electronically)

Review and Release - Overview

Review and Release provides NCP Clients with online and immediate access to Statements, Invoices or other letter-type production files for review and approval prior to production release.

This service is fully configurable, allowing the Client to have total control over which Products and/or Options to include in a sample set of PDFs. However, it is important to note that **Review and Release** holds work at the Job level, not the Product level. A Job within the NCP workflow system may contain multiple Products or Options. If a Job contains a Product that has been configured for **Review and Release** and the Job has not been released for production, then all Products associated with that **Job ID** will be held in a Pending or Hold state until some action is taken.

***Review and Release** is currently not available for Coupon products.

IMPORTANT: **Review and Release** must be configured before the Portlet will display any information.

Review and Release - Email Notifications

The **Review and Release** service is role-based. Users with the **Review and Release-Take Action** service assigned to their role will receive email notifications from Portal when a Job is available for review and approval.

The system automatically generates and distributes one email to <u>all</u> Users assigned to the **Review and Release-Take Action** service. (The emails are not sent individually.) The events that trigger email notifications are as follows:

- **Action Required** email notifications alert Users when a Job is ready for approval in Portal.
- **Approved or Hold** email notifications alert Users when a Job has been approved or placed on hold.

To discontinue email notifications, the **Review and Release-Take Action** service must be removed from the User's role. The Client Administrator can accomplish this in two ways.

- **Update User Role** by removing the assigned **Review and Release – Take Action** service.
- **Deactivate User** from Portal if access is no longer required.

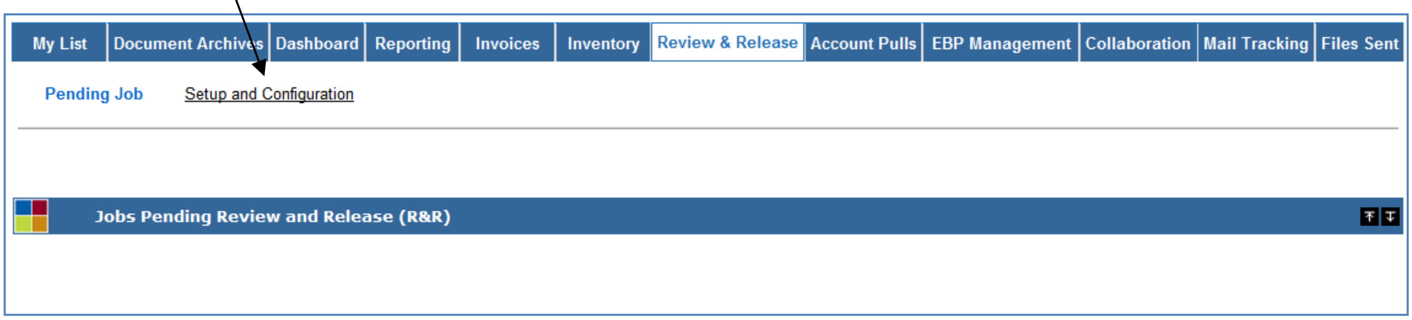
Review and Release - Setup

Review and Release provides the ability for the User to review a Product or Option for accuracy and then approve those Jobs for release to production. **Review and Release** allows the Client to have control over which Products or Options are to be included in the **Review and Release** Service.

The **Review and Release (R&R) Setup** Portlet allows the User to configure Products and/or Options to be included in **Review and Release** by the following parameters:

- All Products or only certain Products
- Products or Product Options
- Quantity to be Sampled
- Type of Sampling (Each, First/Middle/Last, or Flex Field)
- Add, delete, or upload Sample Accounts
- Set Auto Release Time of Products
- Activate or Deactivate Products

The **Review and Release (R&R) Setup** Portlet is accessed from within the **Review and Release** Service by clicking on the Setup and Configuration hyperlink below the Services toolbar.



Review and Release Portlet

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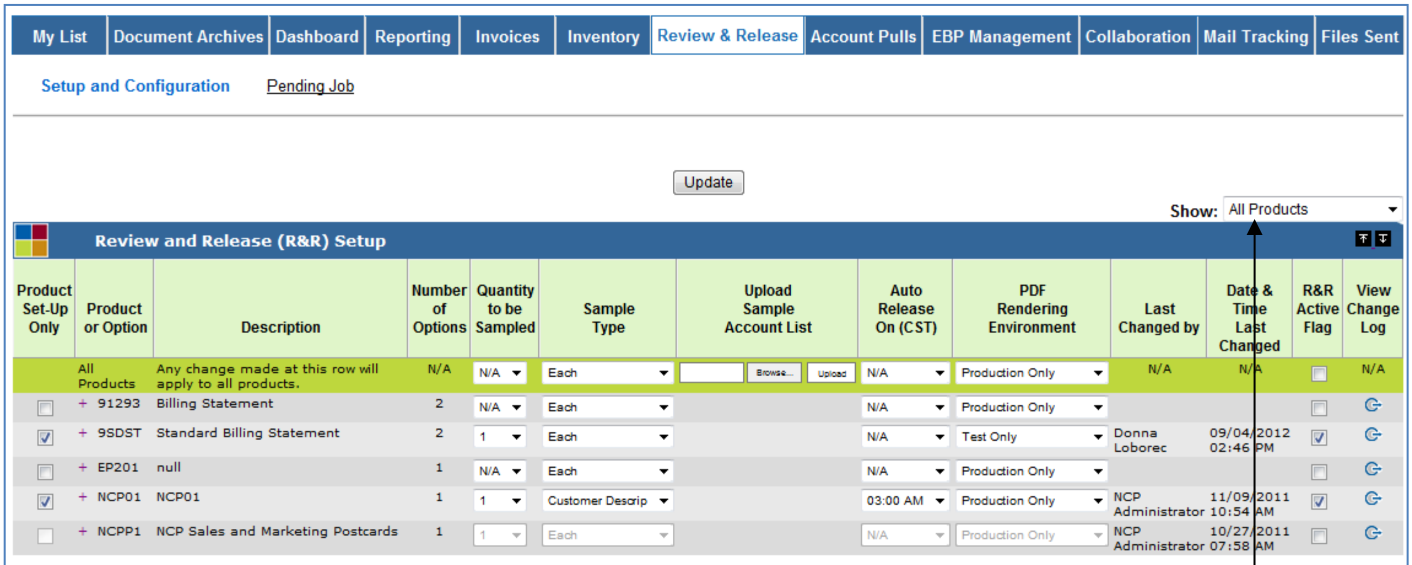
Review and Release – Setup (continued)

The configuration screen provides the User with the ability (based upon assigned Role) to view change and event log information for each Product or Option. The amount and detail of change log information is based upon the role assigned to the User by the Client Administrator.



Review and Release Setup Portlet showing Options

The **Review and Release (R&R) Setup** Portlet consists of the following components:

- A **Show** dropdown list which allows the User to display All Products, Active, or Inactive Products.
- The **All Products** line (highlighted above in green) provides for the rapid setup of Products or Options contained in **Review and Release**. Any changes made at the **All Products** level will be applied to all Products listed.

Data Headers

- **Product Set-Up Only:**
  a. If the box is checked under the Data Header, configuration settings can be applied at the Product level ONLY (highlighted above in gray)
  b. If the box is NOT checked, then configuration settings can be applied at the Option level ONLY (highlighted above in white)

  Note: For Option level view, click the + sign next to the Product Number
- **Product or Option** displays the Product and all configured Options
- **Number of Options** lists the number of Options that are currently defined for that Product
- **Quantity to be Sampled** defines the sampling amount for each selected Product

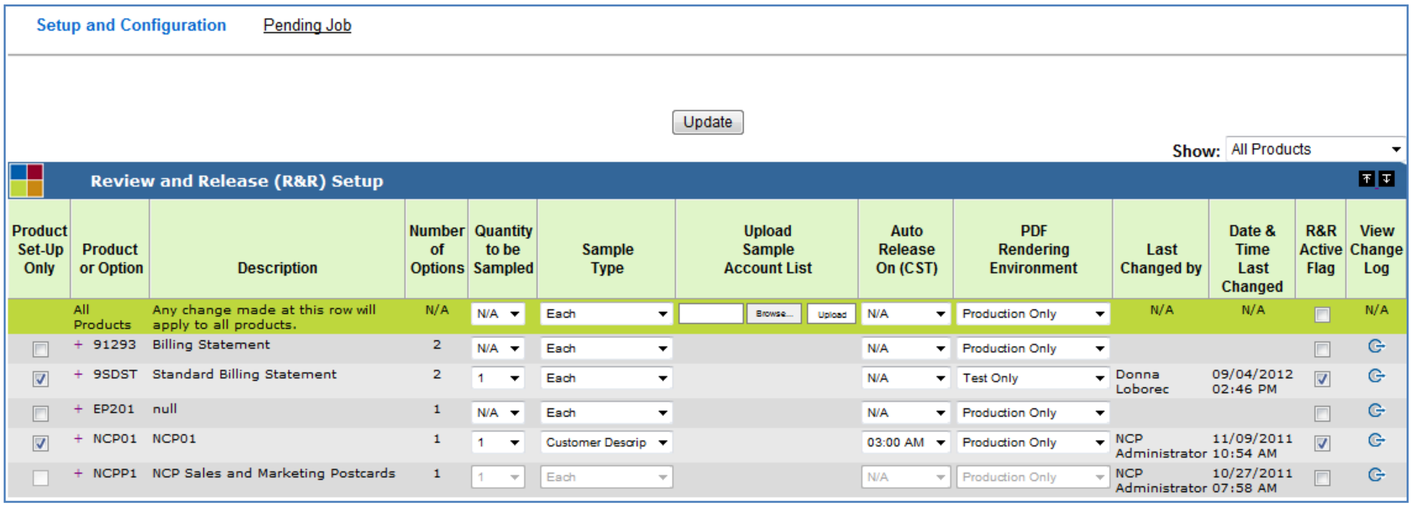
- **Sample Type** enables the User to choose which type of sampling they wish to generate:
  - Each – Can be defined at the Product level or the Option level. When this type is selected, samples will be created for each Product (or Option if defined at the Option level) for each item on the Job. The Quantity to be Sampled determines the number of samples that will be created for each Product. Example: If there are 5 Products on the Job and the Quantity to be Sampled is 5, then a total of 25 samples will be created.
  - FML – Indicates First Middle Last. When this type is selected, samples will be created from the first, middle, and last records on the Job. Example: If the Quantity to be Sampled is 4, then a total of 12 samples will be created. This option must not be selected if you would like a sample of each Option associated with the Product.
  - FLX1-6 – Represents Flex fields. NCP can define up to 6 fields within a Client's data stream that can be indexed for sampling purposes. Flex fields are unique to a Client and must be defined by the Client and NCP prior to receiving a Job. NCP Client Managers have the ability to name Flex Fields in Portal once they have been defined. The Portal system will perform logic similar to the **Each** sampling type. When this Sample Type is selected, samples will be created for each Flex field on the Job. The Quantity to be Sampled determines the number of samples that will be created for the selected Flex field.
    - Example: Assuming Flex1 is selected; if there are 6 different Flex1 fields on the Job (with each of the 6 Flex1 fields having multiple records) and the Quantity to be Sampled is set to 7; then a total of 42 samples will be created.
- **Upload Sample Account List** provides the ability for the Client to upload sample accounts directly into the **Review and Release** Portlet. These specific accounts will be sampled ***in addition*** to the Products or Options configured.
- **Auto Release On** allows a Job to be scheduled for release at a predetermined time although no action has been taken by the User. Auto Release is applied at the global level and cannot be set for individual Products or Options. With Auto Release, a Job will not be held due to lack of User action and will be released automatically at the specified time each day.

  Note: When an Auto Release time of 00:00 is selected, the job will not be held; however, samples will be created. This feature provides a means to Sample Jobs without holding production.
- **PDF Rendering Environment** provides the ability to view Test Samples or Production Samples (through a production environment) via Portal prior to release. The Production Only feature is available to all Clients at all times. For access to the Test Samples feature, please contact NCP Client Services.
- **Last Changed By** and **Date & Time Last Changed** displays the User who last made any modifications to the setup of **Review and Release** and the date/time in which the change occurred.
- **R&R Active Flag** checkbox allows for the selection of the Products that you would like to be included in **Review and Release**. All Products can be included by selecting All Products or individual Products can be selected. When Products are made Inactive, all configuration settings remain set in the system.
- **View Change Log** provides a detailed report showing all changes made to a specific Product or Option.

Review and Release - Configuration

In order for a Product(s) or Option(s) to be included in the **Review and Release** process, they must first be enabled and configured within the **Review and Release** Setup Screen. The steps required to configure Products or Options for the **Review and Release** service are detailed below.

All Products


Setup and Configuration   Pending Job

Update

Show: All Products

Review and Release (R&R) Setup

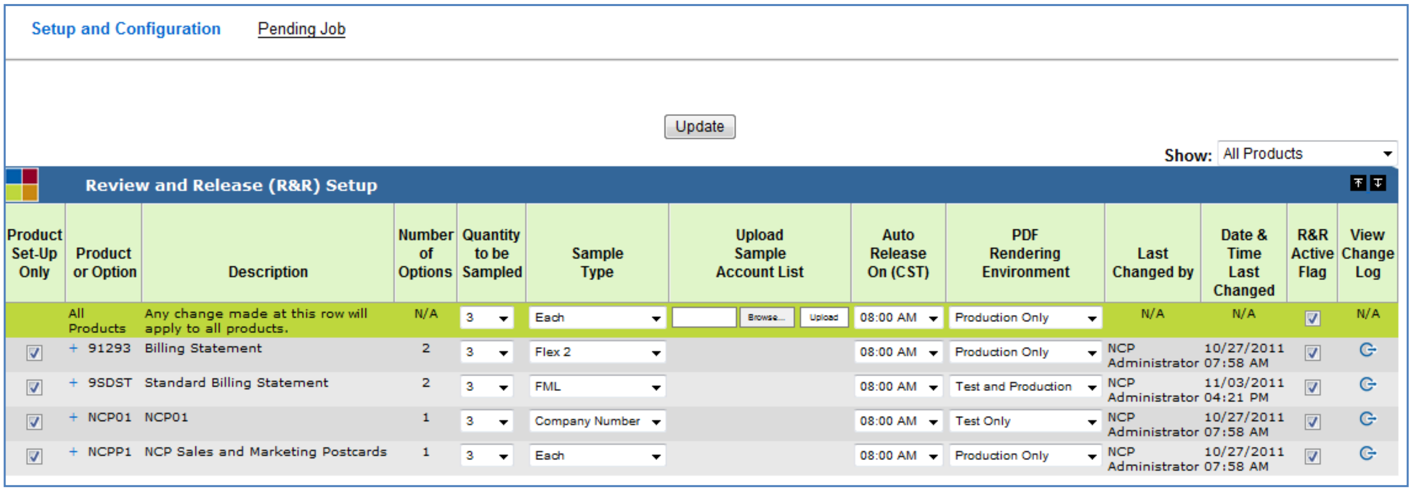
Product Set-Up Only	Product or Option	Description	Number of Options	Quantity to be Sampled	Sample Type	Upload Sample Account List	Auto Release On (CST)	PDF Rendering Environment	Last Changed by	Date & Time Last Changed	R&R Active Flag	View Change Log
	All Products	Any change made at this row will apply to all products.	N/A	N/A	Each	Browse... Upload	N/A	Production Only	N/A	N/A		N/A
	+ 91293	Billing Statement	2	N/A	Each		N/A	Production Only				
	+ 9SDST	Standard Billing Statement	2	1	Each		N/A	Test Only	Donna Loborec	09/04/2012 02:46 PM		
	+ EP201	null	1	N/A	Each		N/A	Production Only				
	+ NCP01	NCP01	1	1	Customer Descrip		03:00 AM	Production Only	NCP Administrator	11/09/2011 10:54 AM		
	+ NCPP1	NCP Sales and Marketing Postcards	1	1	Each		N/A	Production Only	NCP Administrator	10/27/2011 07:58 AM		

Review and Release Setup Portlet (Not configured)

For initial setup, the Quantity to be Sampled fields will default to N/A.

1. Select the Quantity to be Sampled on the **All Products** row (highlighted above in green). Once you have selected a quantity, the R&R Active Flag checkboxes will become selected and the Quantity to be Sampled amount will be applied to all Products listed.
2. Select the **Sample Type** to be generated.
3. Configure an **Auto Release** time if you desire to have Jobs released at a specified time. Otherwise, the field should display the N/A indicator. Please note, Jobs will remain in a "hold" status until a User has reviewed and released the Jobs for production. The **Auto Release** time applies to all Products and is not configurable at the Product level.
   - A notification message will be sent to both the User and the NCP Client Manager for any Jobs that have not been released within a certain time limit. Past due Jobs that have not been approved for release to production will also be displayed in Red in the **Jobs In Production** Portlet.
4. Click the Update button to save your selections.

Review and Release – Configuration (continued)



Setup and Configuration | Pending Job

Update

Show: All Products

Review and Release (R&R) Setup

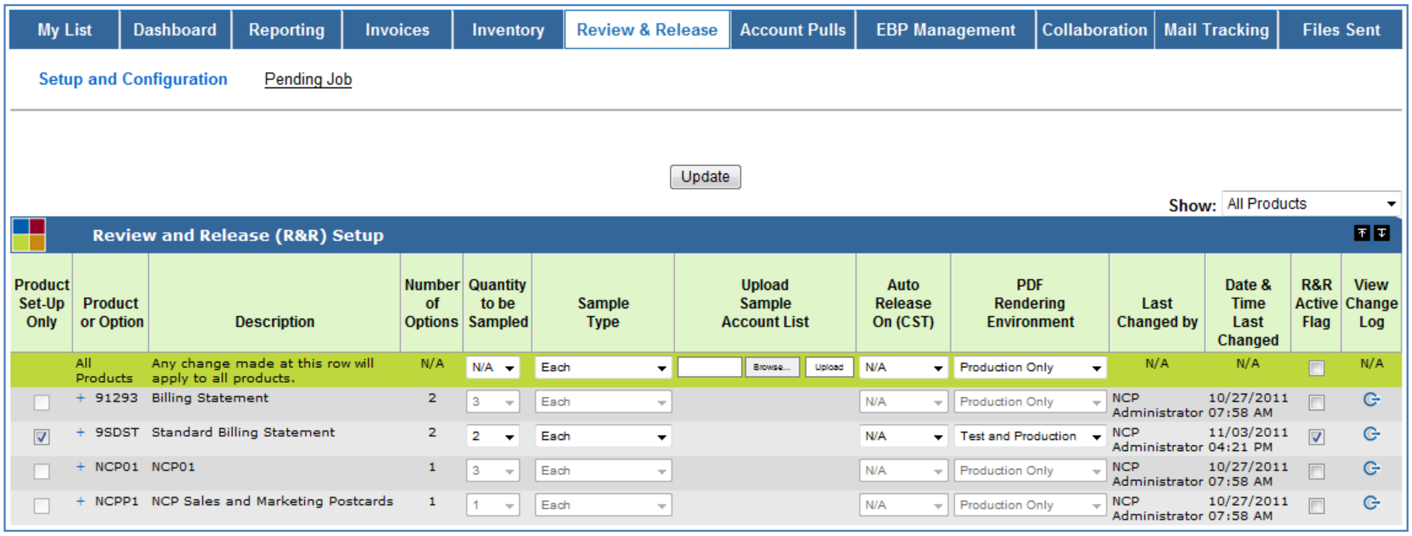
Product Set-Up Only	Product or Option	Description	Number of Options	Quantity to be Sampled	Sample Type	Upload Sample Account List	Auto Release On (CST)	PDF Rendering Environment	Last Changed by	Date & Time Last Changed	R&R Active Flag	View Change Log
	All Products	Any change made at this row will apply to all products.	N/A	3	Each	Browse... Upload	08:00 AM	Production Only	N/A	N/A	☑	N/A
☑	+ 91293	Billing Statement	2	3	Flex 2		08:00 AM	Production Only	NCP Administrator	10/27/2011 07:58 AM	☑	
☑	+ 9SDST	Standard Billing Statement	2	3	FML		08:00 AM	Test and Production	NCP Administrator	11/03/2011 04:21 PM	☑	
☑	+ NCP01	NCP01	1	3	Company Number		08:00 AM	Test Only	NCP Administrator	10/27/2011 07:58 AM	☑	
☑	+ NCPP1	NCP Sales and Marketing Postcards	1	3	Each		08:00 AM	Production Only	NCP Administrator	10/27/2011 07:58 AM	☑	

Review and Release Setup Screen (Configured for All Products)

The screen above shows the following **Review and Release** configuration:

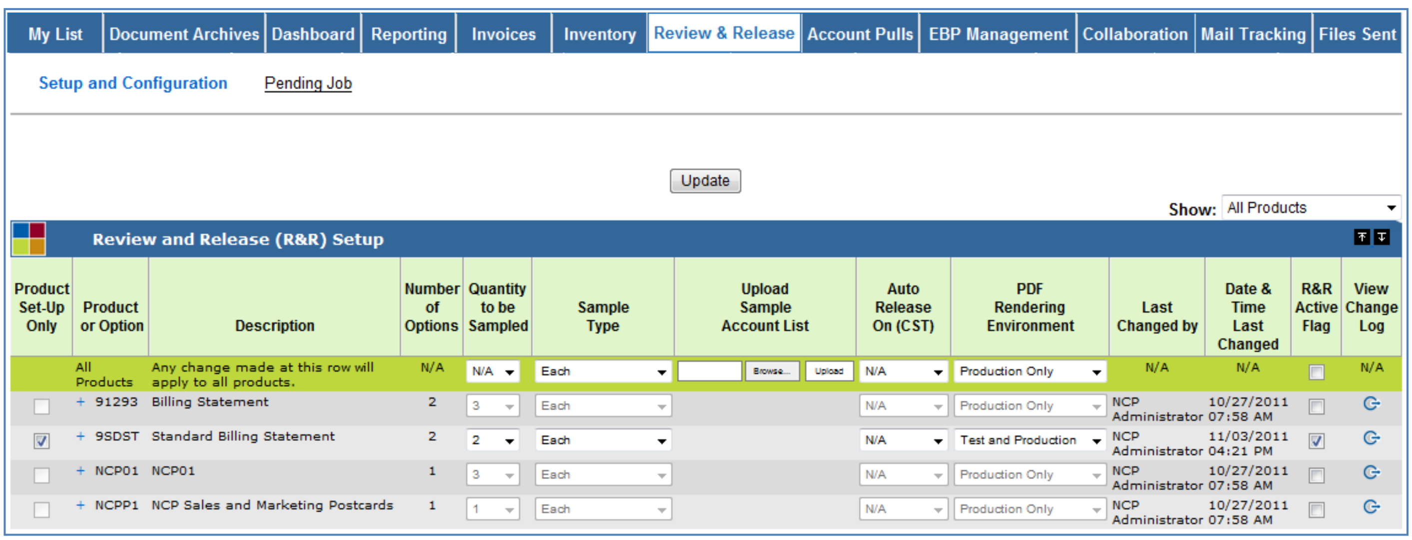
- All Products were selected
- Each Product has a sampled quantity of 3
- Product 91293 – Sample Type is Flex 2 and PDF Rendering Environment is Production Only
- Product 9SDST– Sample Type is First/Middle/Last and PDF Rendering Environment is Test and Production
- Product NCP01– Sample Type is Company Number (this is a named Flex Field) and PDF Rendering Environment is Test Only
- Auto Release Time was set for 8:00 am for all Products

Specific Products



Review and Release Setup Portlet

For initial setup, the Quantity to be Sampled fields will default to N/A.



Review and Release Setup Portlet Showing Setup

1. Select the Quantity to be Sampled for each for the Products that you wish to be included in **Review and Release**. (Once you have selected a quantity, the R&R Active Flag checkboxes will become selected)
   - In the example above, the Quantity to be Sampled for Product #9SDST has been changed to 2.
2. Select the **Sample Type** to be generated.
3. Click the Update button to save your selections.

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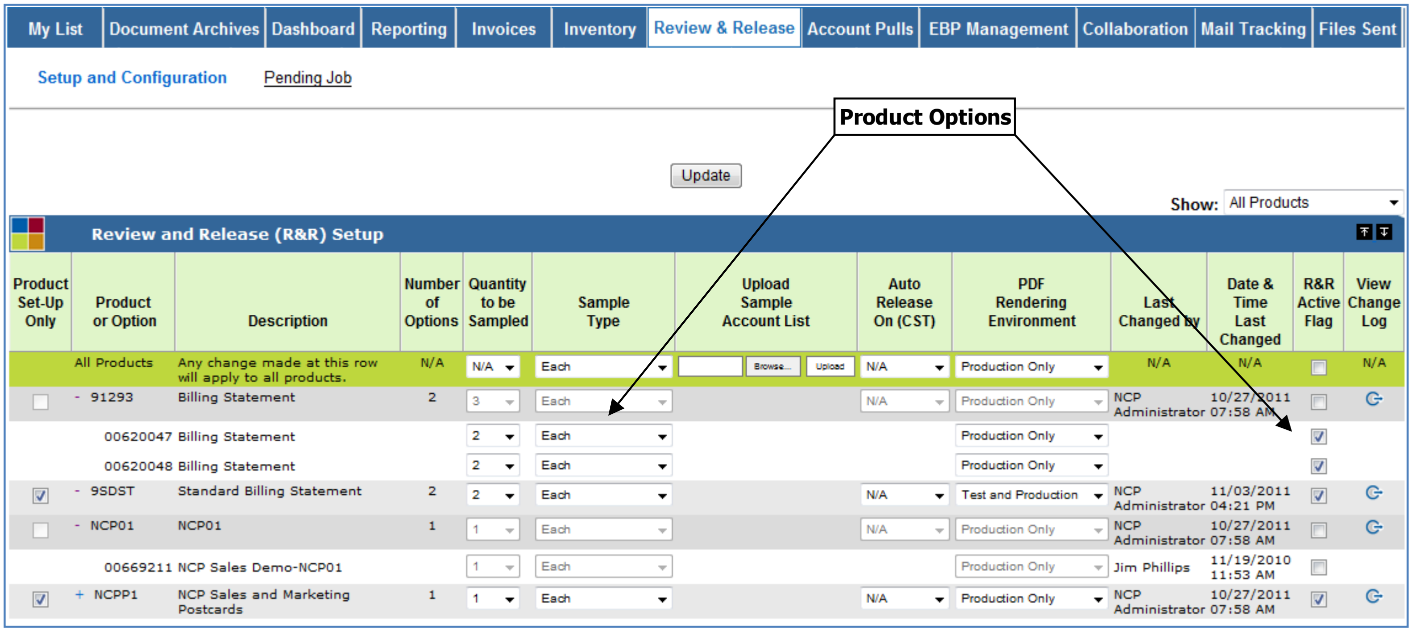
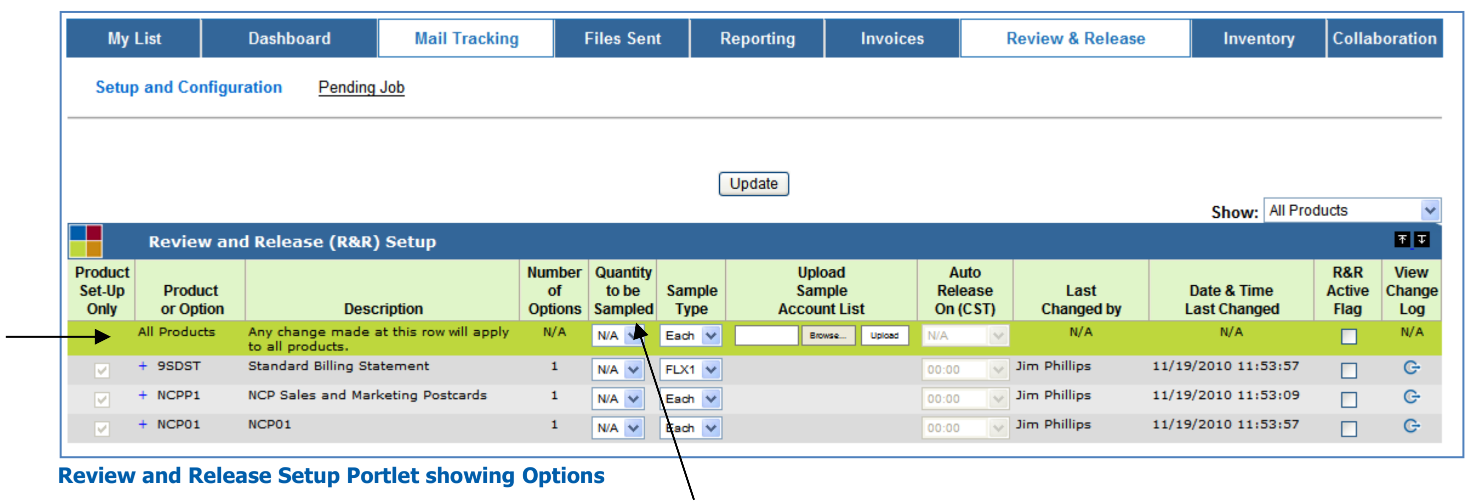
Specific Options



Review and Release Showing Product Options

1. Expand a Product to view the associated Options by clicking on the + symbol to the left of the Product number.
2. Clear the R&R Active Flag checkbox at the Product level for the Option being selected. This will cause the R&R Active Flag checkbox to be enabled at the Option level.
3. Select the Quantity to be Sampled on each of the Options to be selected.
4. Select the R&R Active Flag checkbox for that Option.
5. Click the Update button to save your selections.

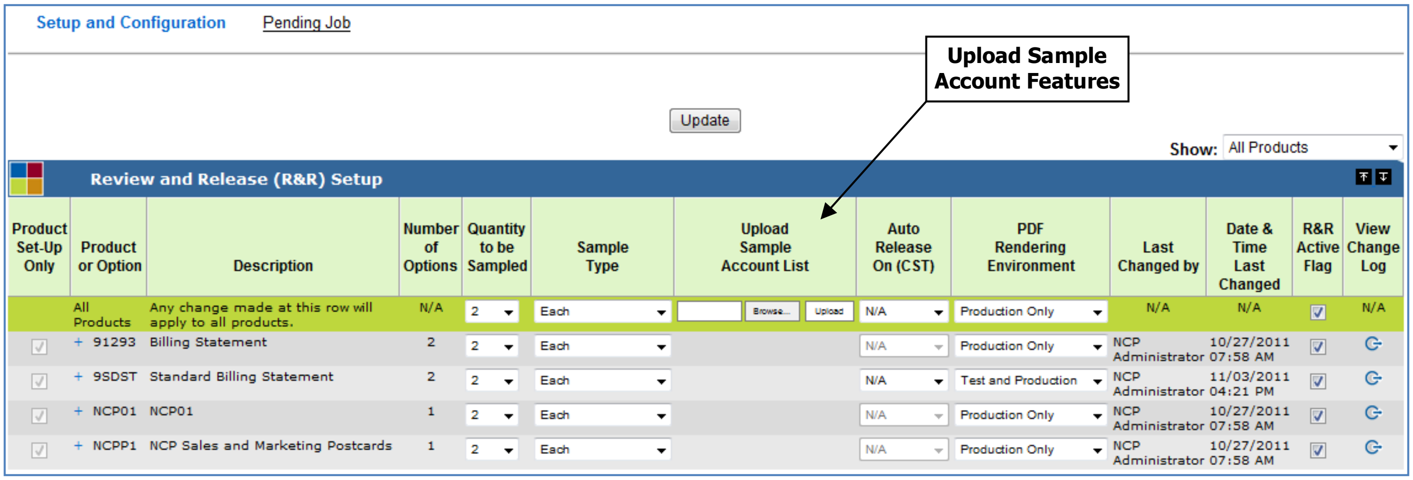
Resetting to Default



Review and Release Setup Portlet showing Options

To clear all selections, change the **Quantity to be Sampled** on the **All Products** row (highlighted in green) to "N/A." The **Quantity to be Sampled** field for each product will be reset to reflect the change.

Upload Sample Account List



Review and Release Setup Portlet

The **Upload Sample Account List** feature provides the User with the ability to:

- Upload a list of accounts to be sampled and reviewed
- View the list of current sampled accounts
- Manually add or delete accounts within the account list

The upload feature requires a comma delimited (.csv) file format. (CSV files are text files in which each column of information is separated by a comma.)

This file format cannot contain a header row. Files that are not properly formatted and/or contain incorrect information will not upload into the system.

The information required for each field (or column) in the upload file is:

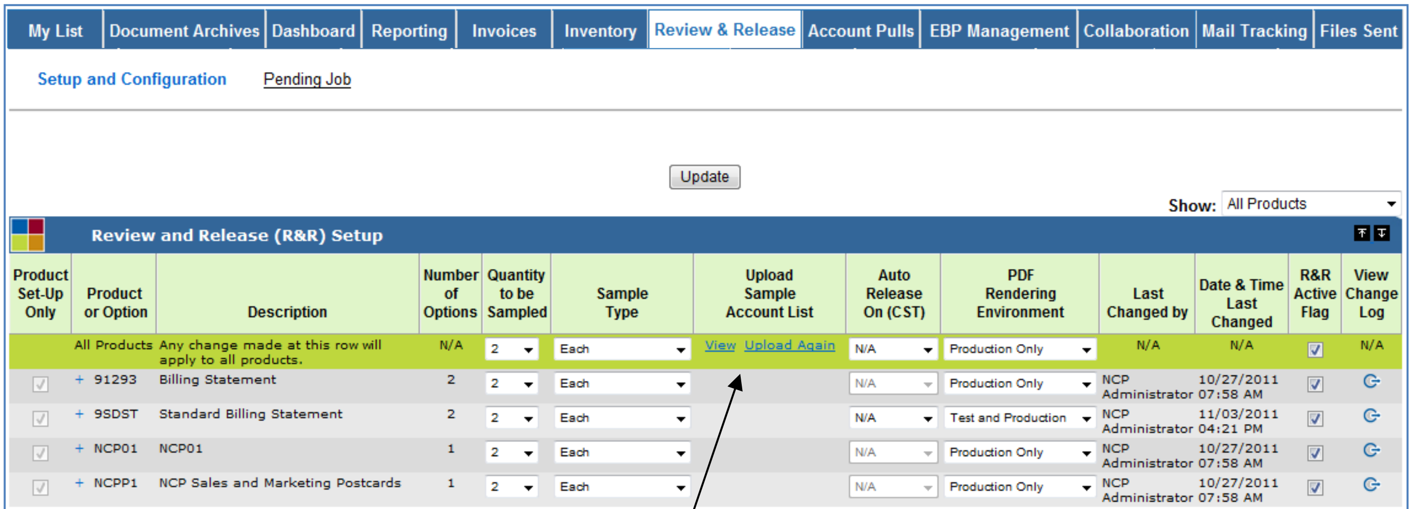
- Account #
- Product/Option #
- Y or N

Below is an example of a properly formatted CSV file.

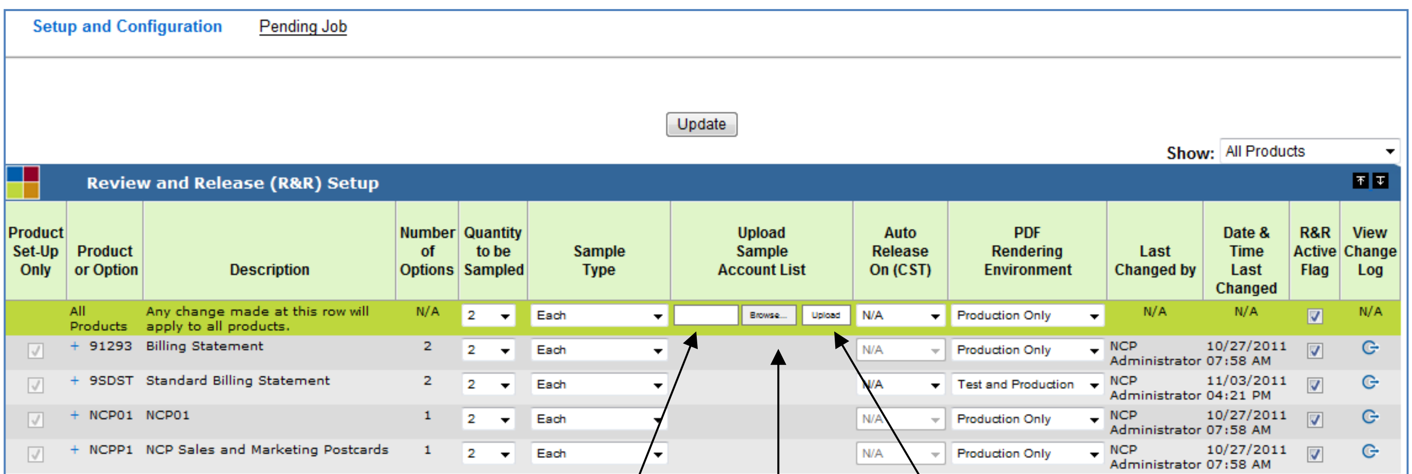
```
999366,9VMK1,Y
835759,9VMK1,Y
690141,9VMK1,Y
```

Example CSV File

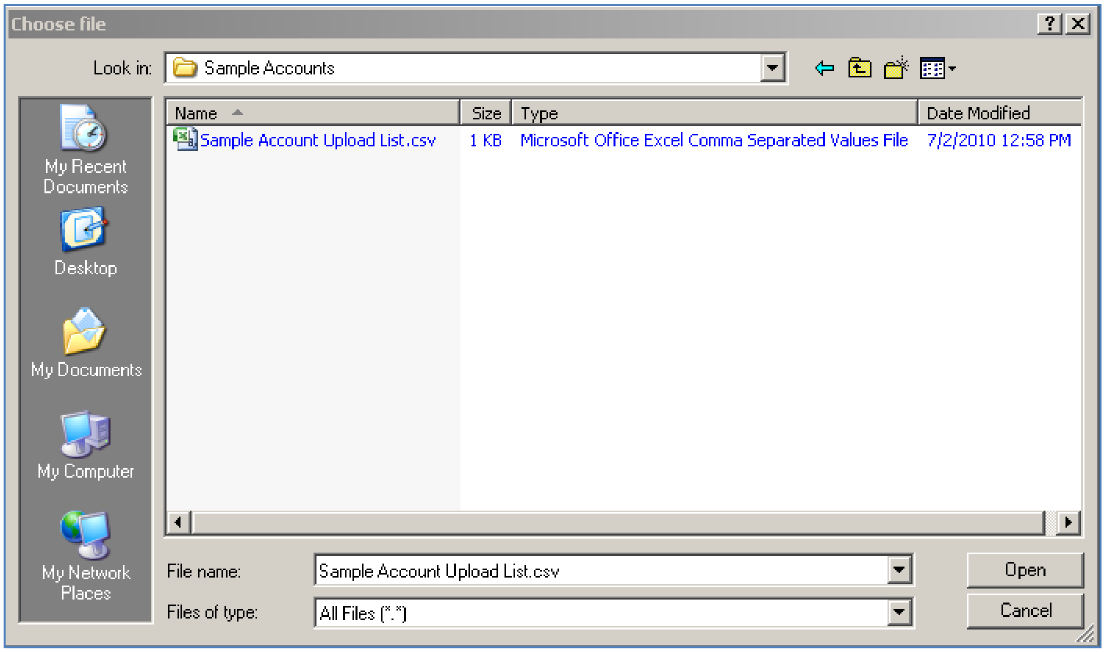
Upload a Sample File



1. Click Upload Again. (Clicking Upload Again or Upload will toggle the available options)



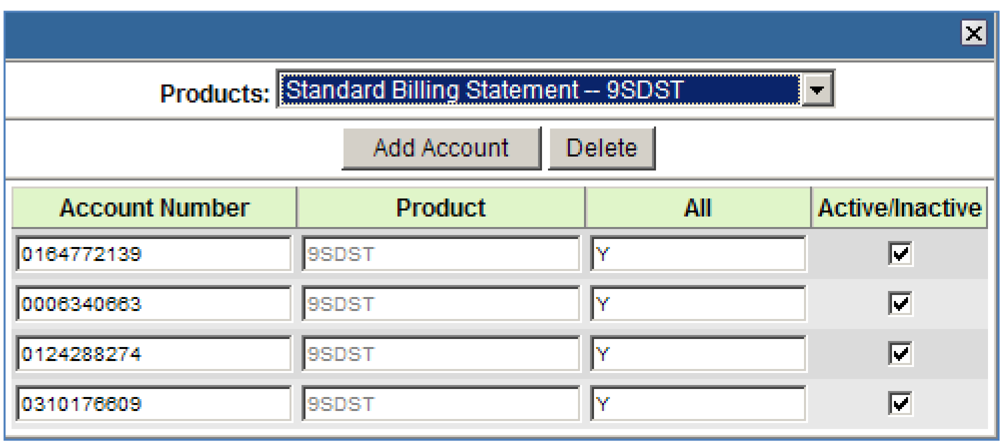
2. The selection options will change to File Location, Browse and Upload.
3. Clicking the Browse button will launch the Choose File function on your local system. :



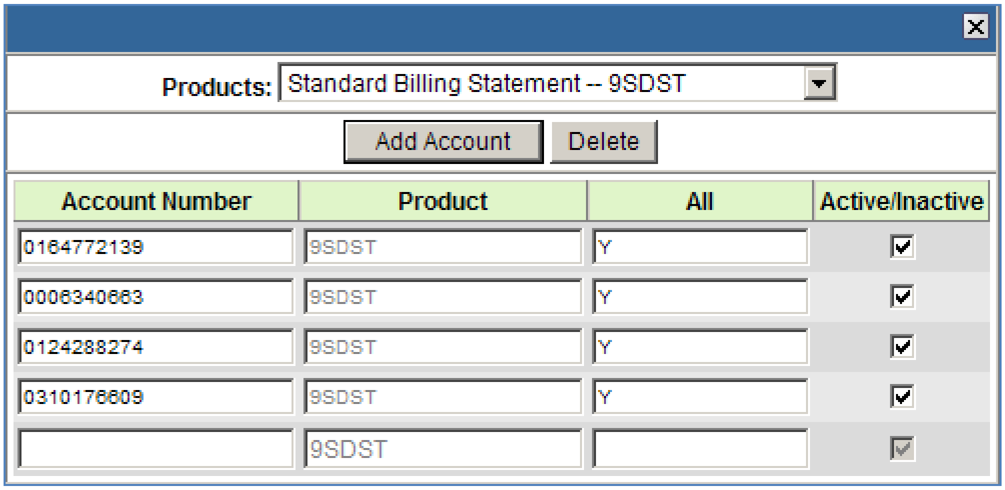
4. Locate the file to upload from your local system and click Open
5. The file location will appear in the File Location box to the left of the Browse button
6. Click Upload to import the file into the **Review and Release (R&R) Setup** Portlet

To View/Modify the Sample Account List:

- With the file location box empty, click Upload. This will toggle the selections to View and Upload Again
- Click View



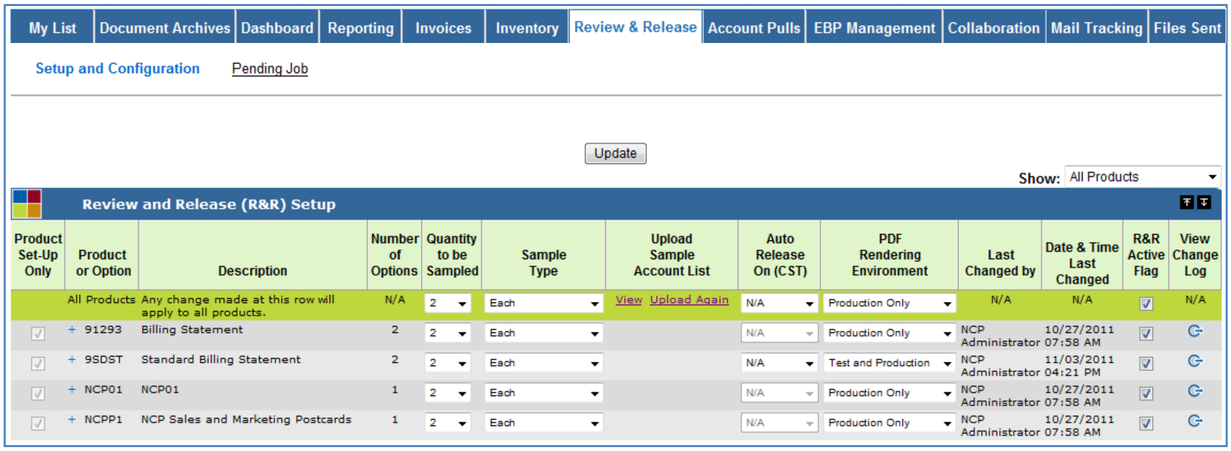
- The **Product Accounts** form will be displayed. From the drop-down list at the top of the Form, select any available product to see the accounts that have been defined
- To delete an account, click anywhere in the **Account Number** field and then click Delete
- To make an account inactive, click the "Active/Inactive" checkbox to deselect the account



- To add an account to the list, click Add Account, enter the *Account #* and *Y* in the “All” field

Review and Release - Managing Jobs

Once **Review and Release** has been configured, this service is utilized by clicking the Pending Job subservice link.

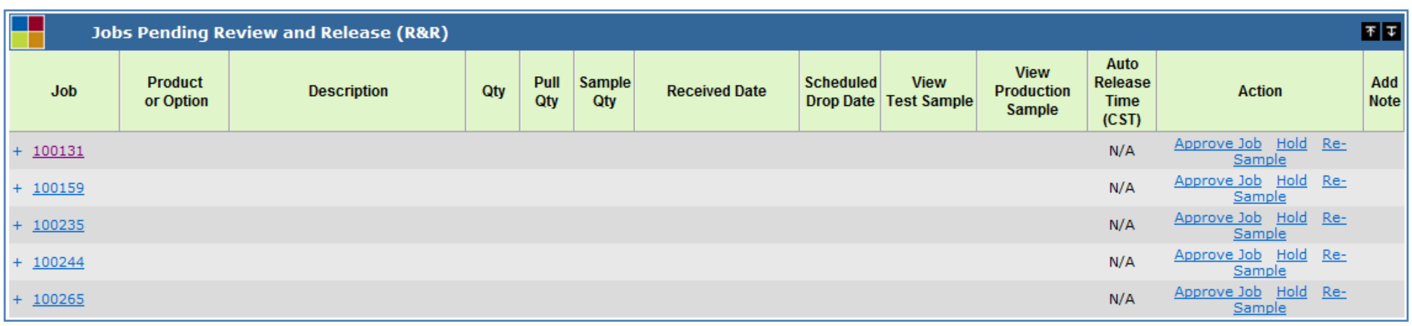


Product Set-Up Only	Product or Option	Description	Number of Options	Quantity to be Sampled	Sample Type	Upload Sample Account List	Auto Release On (CST)	PDF Rendering Environment	Last Changed by	Date & Time Last Changed	R&R Active Flag	View Change Log
	All Products	Any change made at this row will apply to all products.	N/A	2	Each	View Upload Again	N/A	Production Only	N/A	N/A	☑	N/A
☑	+ 91293	Billing Statement	2	2	Each		N/A	Production Only	NCP Administrator	10/27/2011 07:58 AM	☑	
☑	+ 9SDST	Standard Billing Statement	2	2	Each		N/A	Test and Production	NCP Administrator	11/03/2011 04:21 PM	☑	
☑	+ NCP01	NCP01	1	2	Each		N/A	Production Only	NCP Administrator	10/27/2011 07:58 AM	☑	
☑	+ NCPP1	NCP Sales and Marketing Postcards	1	2	Each		N/A	Production Only	NCP Administrator	10/27/2011 07:58 AM	☑	

Review and Release production files will be broken down to their Job elements, fully composed and then presented as a PDF at the Account Record level. This delivers full transparency to the products that will be produced and mailed.

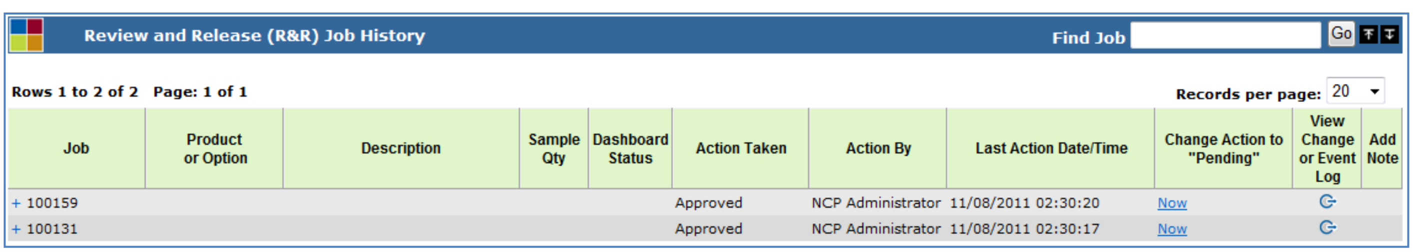
The Review and Release Service consists of two Portlets:

- Jobs Pending Review and Release (R&R)
- Review and Release (R&R) Job History



Job	Product or Option	Description	Qty	Pull Qty	Sample Qty	Received Date	Scheduled Drop Date	View Test Sample	View Production Sample	Auto Release Time (CST)	Action	Add Note
+ 100131										N/A	Approve Job Hold Re-Sample	
+ 100159										N/A	Approve Job Hold Re-Sample	
+ 100235										N/A	Approve Job Hold Re-Sample	
+ 100244										N/A	Approve Job Hold Re-Sample	
+ 100265										N/A	Approve Job Hold Re-Sample	

Jobs Pending Review and Release Portlet



Job	Product or Option	Description	Sample Qty	Dashboard Status	Action Taken	Action By	Last Action Date/Time	Change Action to "Pending"	View Change or Event Log	Add Note
+ 100159					Approved	NCP Administrator	11/08/2011 02:30:20	Now		
+ 100131					Approved	NCP Administrator	11/08/2011 02:30:17	Now		

Review and Release Job History Portlet

Jobs Pending Review and Release Portlet

The **Jobs Pending** Portlet displays Jobs awaiting approval for release to production. All Jobs that have not been approved are listed. Jobs listed in the **Jobs Pending** Portlet are subject to the following actions:

- Approved for release
- Placed on hold
- Re-Sampled

Jobs Pending Review and Release (R&R)

Job	Product or Option	Description	Qty	Pull Qty	Sample Qty	Received Date	Scheduled Drop Date	View Test Sample	View Production Sample	Auto Release Time (CST)	Action	Add Note
+ 100235										N/A	Approve Job Hold Re-Sample	
+ 100244										N/A	Approve Job Hold Re-Sample	
+ 100265										N/A	Approve Job Hold Re-Sample	

Jobs Pending Review and Release Portlet

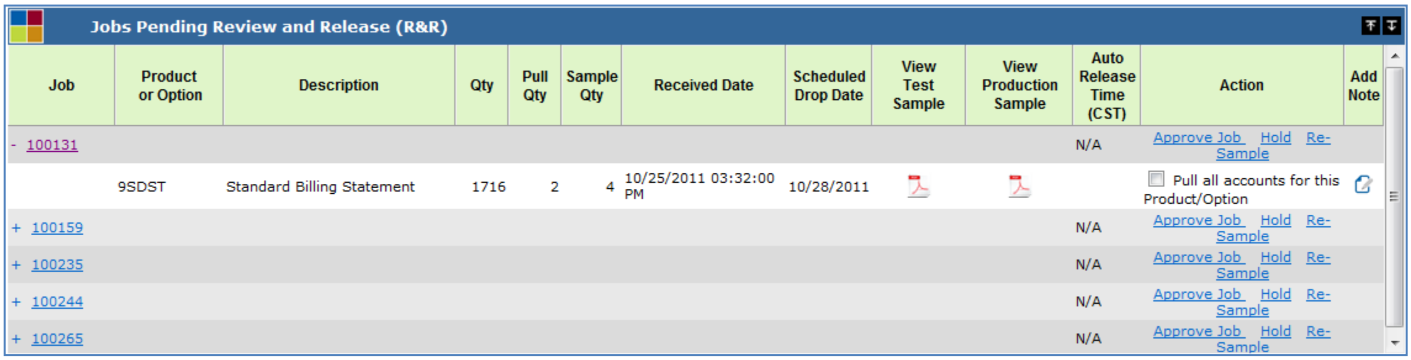
The **Jobs Pending Review and Release** Portlet consists of the following components:

- **Job** displays a list of all current Jobs that contain Products or Options that have been configured for **Review and Release**
- **Product or Option** lists the specific Products or Options that are contained within a Job Expand the Job to view the Products/Options associated with that Job ID
- **Description** provides an item description of each Product or Option
- **Qty** provides the number of pieces that are contained within that particular Product/Option
- **Pull Qty** provides the total number of accounts pulled for that particular Job
- **Sample Qty** provides the total number of sampled pieces generated and available for viewing Sample Qty is based upon the configuration settings that have been defined within the **Review and Release Setup** Portlet
- **Received Date** is the date that the Job was placed into the **Review and Release** Portlet
- **Scheduled Drop Date** is the date that the Job has completed production and is scheduled to be delivered to the carrier for shipment
- **View Test Sample** is a feature that provides the ability to view Test Samples (through a production environment) prior to the job being released. This feature must be administered by an NCP Client Manager.
- **View Production Sample** provides the ability to view a PDF sample for a job. This feature is configured through Review and Release Setup and configuration.
- **Auto Release Time** is the configured time that a Job should be released to production if no User action has been taken. Auto Release is applied at the Job global level and cannot be set for individual Products or Options. With Auto Release, a Job will not be held due to lack of User action and will be released automatically at the specified time each day.
- **Action** Data Header contains the actions that can be performed on each Job listed
- **Add Note** provides Users with the ability to add notes pertaining to that particular Job

Job Approval

Job approval is the process in which all Products or Options are reviewed for accuracy and approved to be released to production. To approve a Job listed within the **Jobs Pending** Portlet:

1. Expand the **Job ID** to view the Products or Options associated with that particular Job by clicking on the + symbol next to the Job ID
2. Prior to Approving a Job, the User is given the option to Pull all accounts for this Product/Option Please refer to the **Account Pulls** section of this document or click here (if viewing electronically)

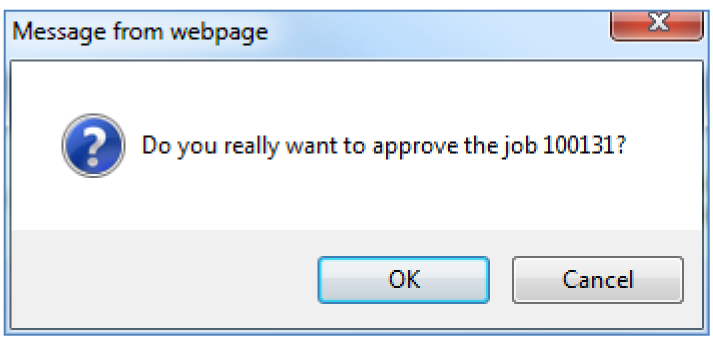


Jobs Pending Review and Release (R&R)

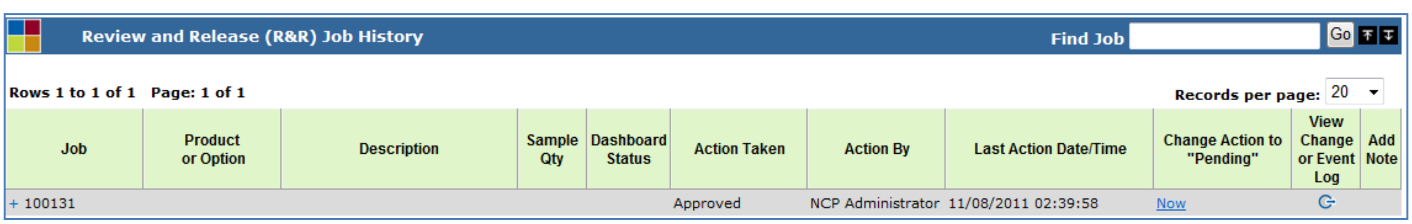
Job	Product or Option	Description	Qty	Pull Qty	Sample Qty	Received Date	Scheduled Drop Date	View Test Sample	View Production Sample	Auto Release Time (CST)	Action	Add Note
- 100131										N/A	Approve Job Hold Re-Sample	
	9SDST	Standard Billing Statement	1716	2	4	10/25/2011 03:32:00 PM	10/28/2011				Pull all accounts for this Product/Option	
+ 100159										N/A	Approve Job Hold Re-Sample	
+ 100235										N/A	Approve Job Hold Re-Sample	
+ 100244										N/A	Approve Job Hold Re-Sample	
+ 100265										N/A	Approve Job Hold Re-Sample	

Jobs Pending with Product Details

3. View the sampled information generated by clicking the View Sample PDF icon of each Product or Option listed.
4. If the information contained in the PDF sample is correct and NO accounts have been flagged for Account Pulls, click the Approve link. The following message will appear :



5. Click OK to approve the Job



Review and Release (R&R) Job History Find Job Go

Rows 1 to 1 of 1 Page: 1 of 1 Records per page: 20

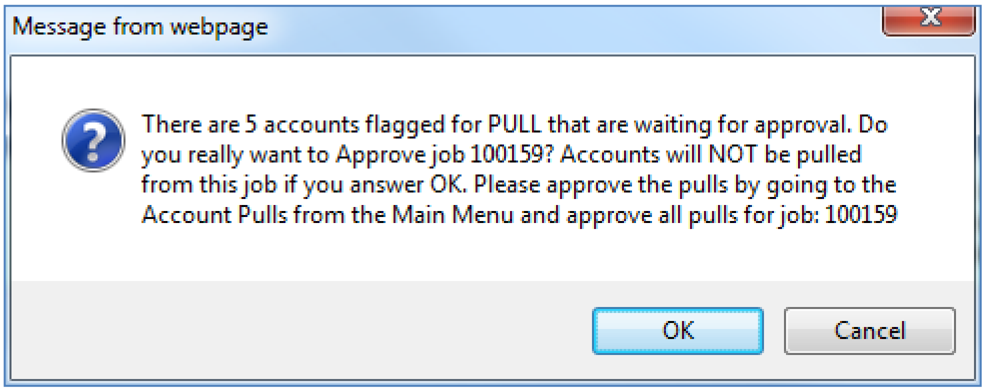
Job	Product or Option	Description	Sample Qty	Dashboard Status	Action Taken	Action By	Last Action Date/Time	Change Action to "Pending"	View Change or Event Log	Add Note
+ 100131					Approved	NCP Administrator	11/08/2011 02:39:58	Now		

Review and Release Job History Portlet

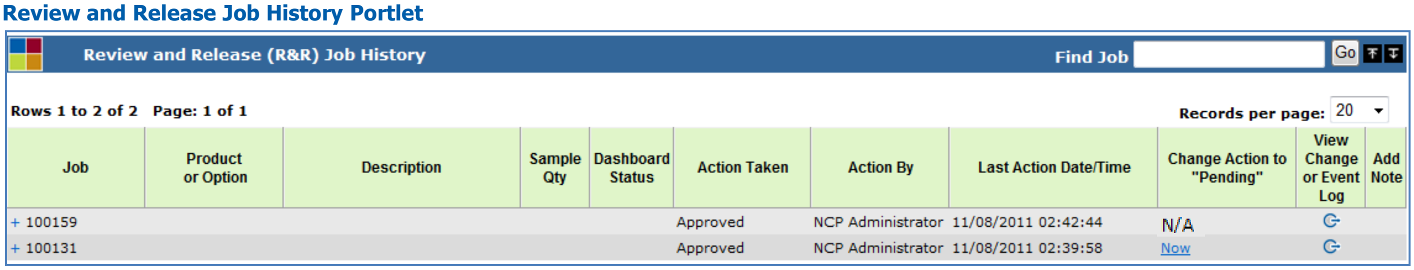
The approved Job will now be cleared from the **Jobs Pending Review and Release** Portlet and will be displayed in the **Review and Release Job History** Portlet.

6. If the information contained in the PDF sample is correct and Accounts for this Job HAVE been Flagged for Account Pulls, when the User clicks the Approve link, the following message will appear, indicating the number of accounts that have been flagged for Pull.

   The User will be directed to the Account Pulls Service to Approve Pulls. If the User chooses not to Approve Pulls at this time, and OK is selected, accounts selected for Pulls will automatically be Un-flagged and the Job will be approved for production.



Review and Release Job History Portlet



Review and Release (R&R) Job History — Find Job — Go

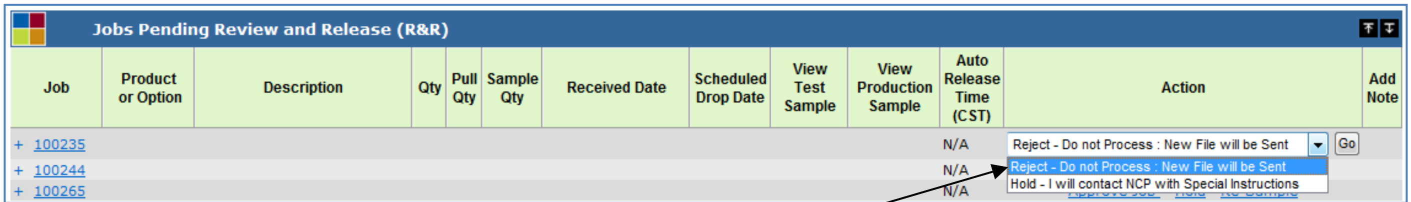
Rows 1 to 2 of 2 Page: 1 of 1 — Records per page: 20

Job	Product or Option	Description	Sample Qty	Dashboard Status	Action Taken	Action By	Last Action Date/Time	Change Action to "Pending"	View Change or Event Log	Add Note
+ 100159					Approved	NCP Administrator	11/08/2011 02:42:44	N/A		
+ 100131					Approved	NCP Administrator	11/08/2011 02:39:58	Now		

- Jobs that have been approved in error MAY be recalled by clicking the Now hyperlink in the **Job History** Portlet immediately upon approved. If the Now link has changed to **N/A**, then the internal workflow engine has retrieved the Job for production processing and is unavailable. It is possible that a **Job** will be retrieved by the internal workflow engine immediately and will not be available to revert to a pending status.
- Jobs will automatically be processed by the NCP internal workflow engine. Once a Job is processed, it cannot be recalled via Portal. Contact your Client Manager if a Job has been approved in error and should not be processed.

Jobs on Hold

There may be circumstances in which a Job should not be released to production and should remain on hold until a specific action is taken by the Client. Under the Action Data Header, click the Hold hyperlink. A dropdown box will display with two options:



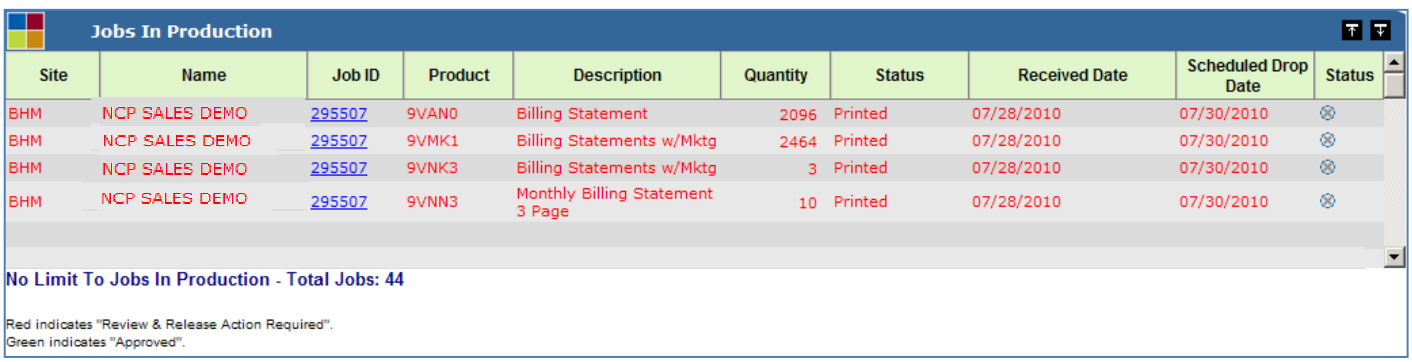
Jobs Pending Review and Release (R&R)

Job	Product or Option	Description	Qty	Pull Qty	Sample Qty	Received Date	Scheduled Drop Date	View Test Sample	View Production Sample	Auto Release Time (CST)	Action	Add Note
+ 100235										N/A	Reject - Do not Process : New File will be Sent ▾ Go	
+ 100244										N/A	Reject - Do not Process : New File will be Sent	
+ 100265										N/A	Hold - I will contact NCP with Special Instructions	

Job selected to be placed on Hold

- "Reject – Do Not Process: New file will be Sent" indicates the received file should not be processed for some reason and that the Client has informed their Client Manager to expect a new file for processing
- "Hold – I will contact NCP with Special Instructions" indicates the Client has requested that the Job be held and will notify their Client Manager of any special instructions related to the Products or Options prior to submitting for production

NOTE: **Review and Release** holds work at the Job level, not the Product level. A Job within the NCP workflow system may contain multiple Products or Options. If a Job contains a Product that has been configured for **Review and Release** and the Job has not been released for production, then all Products associated with the Job ID will be held in a "Pending" or "Hold" state until some action is taken.



Jobs In Production

Site	Name	Job ID	Product	Description	Quantity	Status	Received Date	Scheduled Drop Date	Status
BHM	NCP SALES DEMO	295507	9VAN0	Billing Statement	2096	Printed	07/28/2010	07/30/2010	
BHM	NCP SALES DEMO	295507	9VMK1	Billing Statements w/Mktg	2464	Printed	07/28/2010	07/30/2010	
BHM	NCP SALES DEMO	295507	9VNK3	Billing Statements w/Mktg	3	Printed	07/28/2010	07/30/2010	
BHM	NCP SALES DEMO	295507	9VNN3	Monthly Billing Statement 3 Page	10	Printed	07/28/2010	07/30/2010	

No Limit To Jobs In Production - Total Jobs: 44

Red indicates "Review & Release Action Required".
Green indicates "Approved".

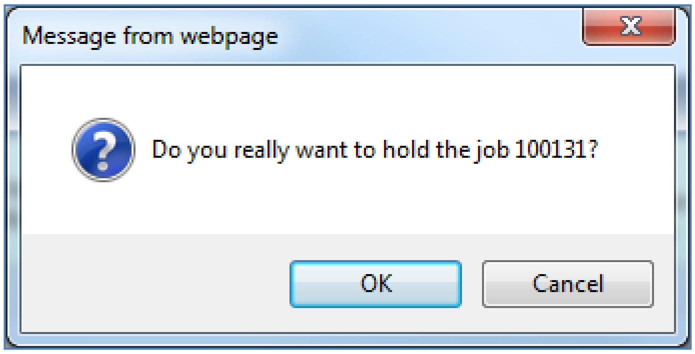
"Held" Jobs In Production as seen in the Dashboard

In the example above, Job ID 295507 contains four Products, however, only Product 9VAN0 has been configured for use with **Review and Release**. If the Job associated with 9VAN0 has been placed on Hold, then all Products associated with the Job will be placed on Hold as well. Only when 9VAN0 has been released to production will the remaining Products be released.

Placing a Job on Hold

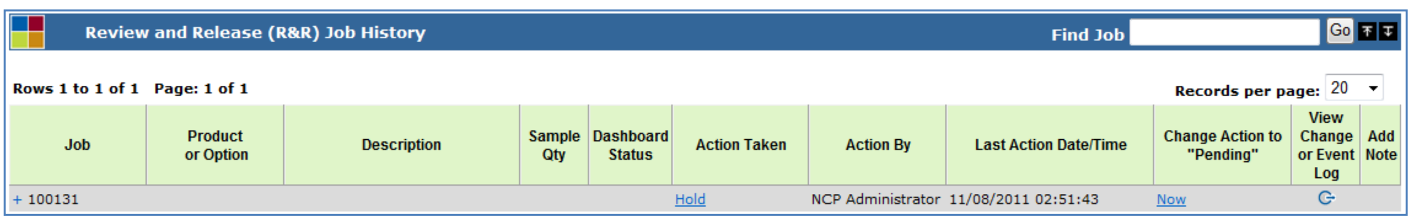
To place a Job on Hold:

- Click the Hold link
- From the Action dropdown list, select "Hold, I will contact NCP with Special Instructions"
- Click Go. The following message will appear:



- Click OK to hold the Job.

Jobs that have been placed on Hold are transferred to the **Job History** Portlet and will display Hold under the **Action Taken** Data Header. These Jobs are not automatically processed by the NCP workflow engine and will remain in a Held state until the User contacts their NCP Client Services Administrator.



Review and Release (R&R) Job History   Find Job   Go

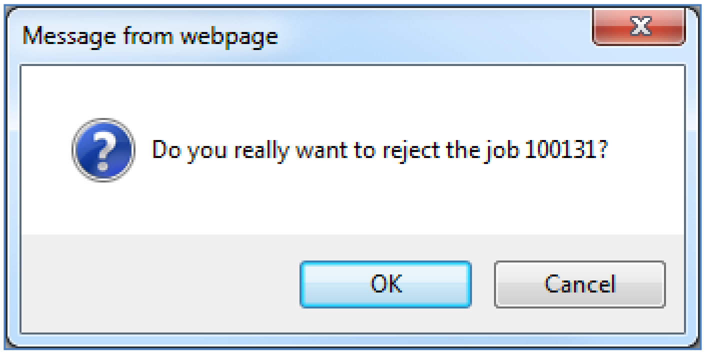
Rows 1 to 1 of 1   Page: 1 of 1   Records per page: 20

Job	Product or Option	Description	Sample Qty	Dashboard Status	Action Taken	Action By	Last Action Date/Time	Change Action to "Pending"	View Change or Event Log	Add Note
+ 100131					Hold	NCP Administrator	11/08/2011 02:51:43	Now		

Job History with Job 100131 in "Held" state

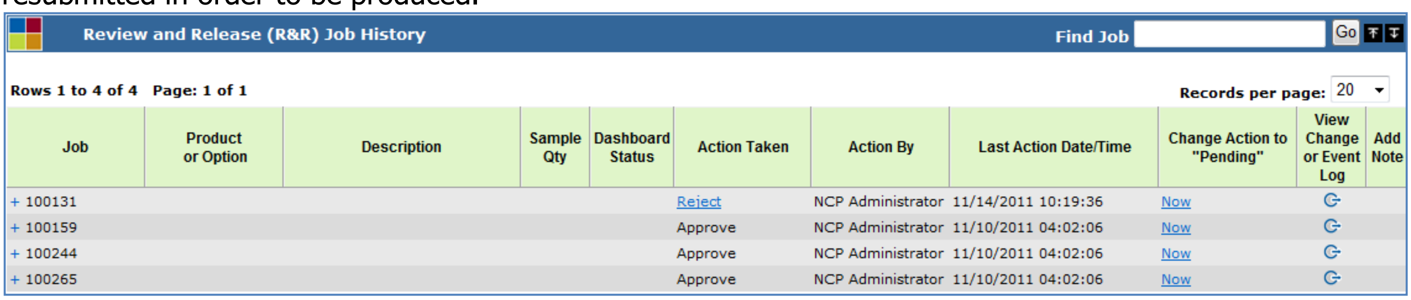
To Reject A Job:

- Click the Hold link
- From the Action dropdown list, select Reject – Do not Process: New File will be Sent
- Click Go. The following message will appear:



- Click OK to reject the Job.

Jobs that have been rejected are transferred to the **Job History** Portlet and will display “Reject” under the **Action Taken** Data Header. These Jobs are removed from the production process and must be resubmitted in order to be produced.



Review and Release (R&R) Job History Find Job Go

Rows 1 to 4 of 4 Page: 1 of 1 Records per page: 20

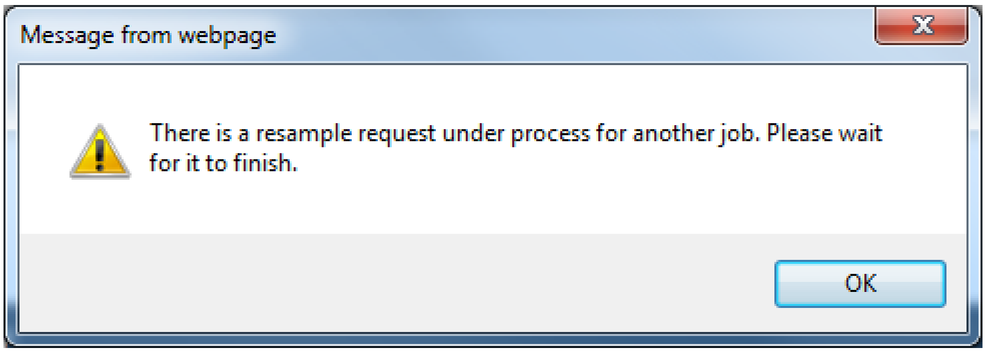
Job	Product or Option	Description	Sample Qty	Dashboard Status	Action Taken	Action By	Last Action Date/Time	Change Action to "Pending"	View Change or Event Log	Add Note
+ 100131					Reject	NCP Administrator	11/14/2011 10:19:36	Now		
+ 100159					Approve	NCP Administrator	11/10/2011 04:02:06	Now		
+ 100244					Approve	NCP Administrator	11/10/2011 04:02:06	Now		
+ 100265					Approve	NCP Administrator	11/10/2011 04:02:06	Now		

Job History with Job 100131 in “Reject” state

Re-Sampling a Job

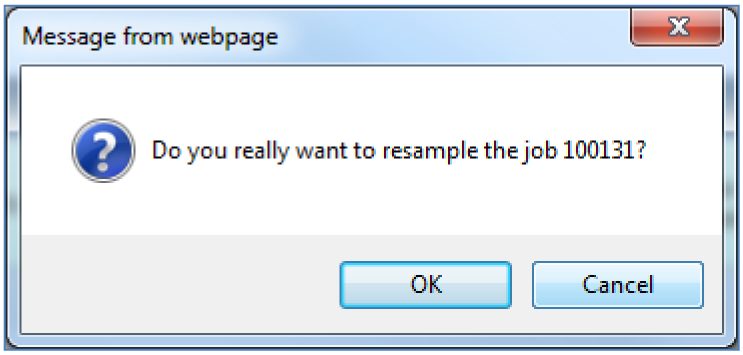
Sampled Job information is generated based upon the configuration settings within the **Review and Release Setup** Portlet. However, if a different set of sampled information is desired, the configuration of **Review and Release** can be modified to reflect the desired sampling criteria and existing Jobs can be re-sampled to generate this new set of information.

1. The re-sampling process is extremely processor-intensive and may take a few minutes to complete, based upon the amount of records contained with the Job and the configuration settings selected.
2. Due to the amount of resources required, re-sampling will only allow a single instance to be run. If during the re-sampling process a second request is submitted, the following message will appear:



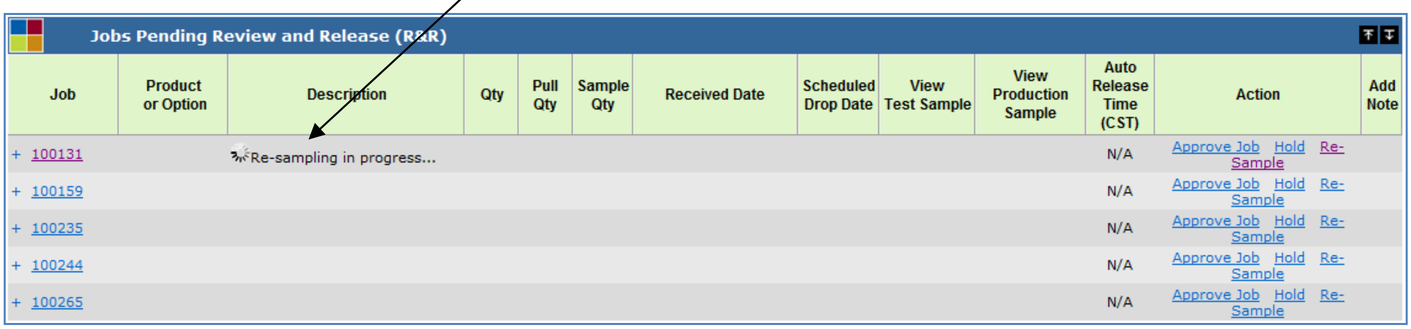
To Re-Sample Job information:

- Click the Setup and Configuration link located beneath the Services Taskbar. This will take you directly to the **Review and Release Setup** Portlet.
- Make the desired changes to any Products or Options and click Update to save your changes.
- Click on Review and Release from the Services Toolbar.
- Click Re-Sample on the Job that you would like to generate updated information. The Portlet will display the following message:



- Click OK to have the Job submitted for Re-Sampling.

Re-sampling Progress Indicator



Jobs Pending Review and Release (R&R)

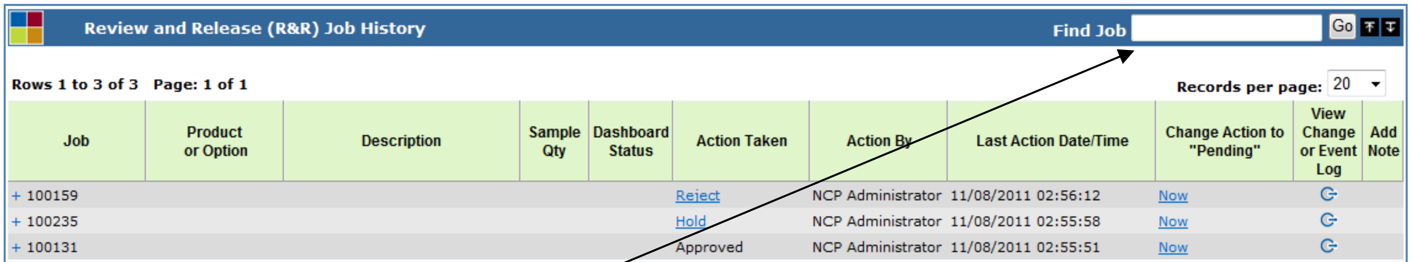
Job	Product or Option	Description	Qty	Pull Qty	Sample Qty	Received Date	Scheduled Drop Date	View Test Sample	View Production Sample	Auto Release Time (CST)	Action	Add Note
+ 100131		Re-sampling in progress...								N/A	Approve Job Hold Re-Sample	
+ 100159										N/A	Approve Job Hold Re-Sample	
+ 100235										N/A	Approve Job Hold Re-Sample	
+ 100244										N/A	Approve Job Hold Re-Sample	
+ 100265										N/A	Approve Job Hold Re-Sample	

Jobs Pending Screen – Re-sampling in progress

During the re-sampling process, the Sample Qty will be reset to 0 and the PDF icons will be grayed out. The Sample Qty will repopulate and the PDF icons will become available for selection as the information is gathered for each product.

Job History

Jobs that have been approved for release to production or placed on Hold are transferred to the **Job History** Portlet. Jobs placed on Hold will display "Reject" or "Hold" under the **Action Taken** Data Header.



Review and Release (R&R) Job History — Find Job [Go]

Rows 1 to 3 of 3 Page: 1 of 1 — Records per page: 20

Job	Product or Option	Description	Sample Qty	Dashboard Status	Action Taken	Action By	Last Action Date/Time	Change Action to "Pending"	View Change or Event Log	Add Note
+ 100159					Reject	NCP Administrator	11/08/2011 02:56:12	Now		
+ 100235					Hold	NCP Administrator	11/08/2011 02:55:58	Now		
+ 100131					Approved	NCP Administrator	11/08/2011 02:55:51	Now		

Job History Portlet

Job Search

Specific Jobs can be located within **Review and Release Job History** by entering a specific *Job ID* in the "Find Job" Search box and selecting Go.

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Account Pulls - Overview

The **Account Pulls** Service provides NCP Clients with the ability to Pull (Remove) individual accounts from a **Job** prior to release for print production or archive. Approved Pulls will be removed from the production process and must be resubmitted in order to be produced.

Clients must have access to the **Review and Release Service** and have a **Job** held in **Review and Release** in order to utilize the **Account Pulls** Service**.** The **Account Pulls** Service is accessed via Portal's Main Services Toolbar.

My List	Dashboard	Mail Tracking	Files Sent	Reporting	Invoices	Review & Release	Account Pulls	Inventory	Collaboration

Account Pulls consists of three main actions:

- Selecting Accounts for Pulls
- Approving Pulls
- Releasing a Job in Review and Release

If **Review and Release** has been configured, all Products/Options that have been set up for this service will be held until approved for Release. All held Jobs are available for Pulls and can be viewed within the **Review and Release** Service and/or the **Account Pulls** Service:

Review and Release Service - Jobs Pending Review and Release Portlet

Jobs Pending Review and Release (R&R)

Job	Product or Option	Description	Qty	Sample Qty	Received Date	Scheduled Drop Date	View Sample	Auto Release Time (CST)	Action
+ 101858								N/A	Approve Hold Re-Sample
+ 101921								N/A	Approve Hold Re-Sample
+ 101922								N/A	Approve Hold Re-Sample
+ 101923								N/A	Approve Hold Re-Sample
+ 101924								N/A	Approve Hold Re-Sample
+ 101925								N/A	Approve Hold Re-Sample

Account Pulls Service - Jobs Available for Pulls (Waiting Review and Release) Portlet

Jobs Available for Pulls (Waiting Review and Release) Account Number Go

Received Date	Job ID	Product	Description	Total Quantity	Available For Pull Quantity	Waiting Approval Quantity	Approved Quantity	Scheduled Drop Date	Add Note
03/11/2011 11:32 AM	101925	9SDST	Standard Billing Statement	15272	15269	0	3	03/16/2011	
03/11/2011 11:27 AM	101924	9SDST	Standard Billing Statement	1001	1001	3	0	03/16/2011	
03/11/2011 11:26 AM	101923	9SDST	Standard Billing Statement	3323	3323	0	0	03/16/2011	
03/11/2011 11:25 AM	101922	9SDST	Standard Billing Statement	7887	7887	0	0	03/16/2011	
03/11/2011 11:23 AM	101921	9SDST	Standard Billing Statement	1869	1869	0	0	03/16/2011	
03/04/2011 09:42 AM	101858	9SDST	Standard Billing Statement	1458	1458	0	0	03/09/2011	

Jobs Available for Pulls (Waiting Review and Release)

Three Portlets are integrated into the Account Pulls main page:

- **Jobs Available for Pulls (Waiting Review and Release)** Portlet
- **Account Pulls Review and Release** Portlet
- **Account Pulls History (Jobs Completed)** Portlet

Jobs Available for Pulls Portlet

Account Number Search Box

Jobs Available for Pulls (Waiting Review and Release) — Account Number [ ] Go

Received Date	Job ID	Product	Description	Total Quantity	Available For Pull Quantity	Waiting Approval Quantity	Approved Quantity	Scheduled Drop Date	Add Note
03/15/2011 08:10 AM	101954	9SDST	Standard Billing Statement	4692	4689	0	3	03/18/2011	
03/15/2011 08:18 AM	101952	9SDST	Standard Billing Statement	4692	4692	0	0	03/18/2011	
03/15/2011 08:19 AM	101951	9SDST	Standard Billing Statement	4692	4692	0	0	03/18/2011	
03/14/2011 11:40 AM	101946	9SDST	Standard Billing Statement	14160	14160	0	0	03/17/2011	
03/14/2011 11:41 AM	101945	9SDST	Standard Billing Statement	585	0	0	585	03/17/2011	

Jobs Available for Pulls (Waiting Review and Release) Portlet

The **Jobs Available for Pulls** Portlet contains Data Headers that display a list of all Jobs that are available for Pulls. Information about each Job contained within the **Jobs Available for Pulls** Portlet includes:

- **Received Date** – Date that a file was received from a Client by NCP for processing
- **Job ID -** A number assigned to a data file or group of files that is used to track work in progress
- **Product** – Product Number
- **Description –** Product Description
- **Total Quantity –** Total Quantity to be Processed
- **Available for Pull Quantity –** Total Accounts Available for Pulls
- **Waiting Approval Quantity** – Total Accounts Waiting for Approval
- **Approved Quantity** – Total Accounts Approved for Pulls
- **Scheduled Drop Date -** Date that a Job is scheduled to be completed and mailed
- **Add Note** – This feature must be turned on by the Client Administrator. If this feature has been activated, the User will see the Note icon under the Add Note Data Header. If this feature has not been activated the User will not see an Icon. For more details on the Adding Notes, please refer to the **Account Pulls – Add Note** Feature section of this document or click here (if viewing electronically).
- **Account Number Search Box** – This feature allows the User to search the Portlet by entering a specific Account Number. Please note that all Search Box fields support wildcard searches and will return results whether the User enters complete values or partial values.

Account Pulls Review and Release Portlet

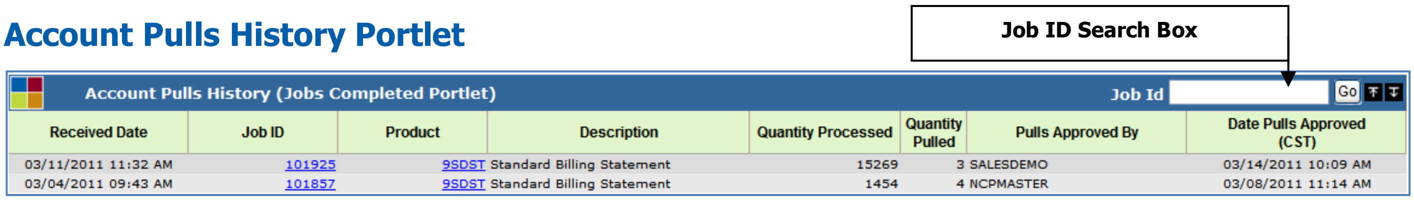
Account Pulls Review and Release Portlet

The **Account Pulls Review and Release** Portlet consist of the following components:

- **Upload Accounts** Feature -- User can upload a .csv or .xls file
  - File Box
  - Browse Button
  - Upload Accounts Button
- **Clear Portlet Data Button**
- **Approve Pulls Button**
- **Original Address1 Search Box** – User can search Accounts Available for Pulls by Address1
- **Account Number Search Box** – User can search Accounts Available for Pulls by Account Number
- **Flex Search Box** – User can search Accounts Available for Pulls by Flex Field
- **Dropdown Search Box**
  - Search Available Jobs
  - Search Job History Dropdown

NOTE: All Search box fields support wildcard searches and will return results whether the User enters complete values or partial values.

Account Pulls History Portlet



Received Date	Job ID	Product	Description	Quantity Processed	Quantity Pulled	Pulls Approved By	Date Pulls Approved (CST)
03/11/2011 11:32 AM	101925	9SDST	Standard Billing Statement	15269	3	SALESDEMO	03/14/2011 10:09 AM
03/04/2011 09:43 AM	101857	9SDST	Standard Billing Statement	1454	4	NCPMASTER	03/08/2011 11:14 AM

Account Pulls History (Jobs Completed) Portlet

The **Account Pulls History** Portlet provides information on accounts that have been Pulled out of the Production queue and will not be processed.

The **Account Pulls History** Portlet consists of the following components:

- **Received Date** – Date that a file was received from a Client by NCP for processing
- **Job ID -** A number assigned to a data file or group of files that is used to track work in progress
- **Product** – Product Number
- **Description –** Product Description
- **Quantity Processed** – Total Accounts Processed after Pulls
- **Quantity Pulled** – Total Accounts Pulled
- **Pulls Approved By** – User
- **Date Pulls Approved –** Approval Date
- **Job ID Search Box** – User can Search Pulled Accounts by Job ID

Account Pulls – Pulling Accounts

This section will explain how to:

- Upload Accounts
- Flag All Accounts
- Flag Individual Accounts
- Flag by Search Values
- Approve Pulls

Upload Accounts Overview

Upload Accounts provides the ability for the Client to upload accounts directly into the **Account Pulls Review and Release** Portlet.

The **Upload Account** Feature provides the User with the ability to:

- Upload a list of accounts to be Pulled
- View the list of current accounts available for Pulls
- Manually deselect accounts that should NOT be pulled

The upload feature requires either a comma delimited (.csv) or Microsoft Excel 2003 (.xls) file format. (.csv files are text files in which each column of information is separated by a comma.)

These file formats cannot contain a header row. Files not properly formatted or containing incorrect information will not upload into the system.

The following information will be accepted:

- Account #
- Product/Option #
- Account #, Product/Option #

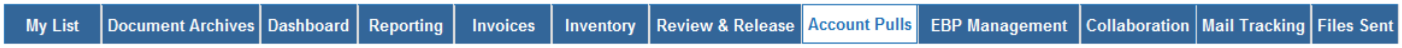
Below is an example of a properly formatted CSV file. This example contains:

- Account Number
- Account Number, Product/Option Number

```
0004769493
0006558112
0011593410
0012406510, 00078896
0012733262, 00078896
```

Example CSV File

How to Upload Accounts

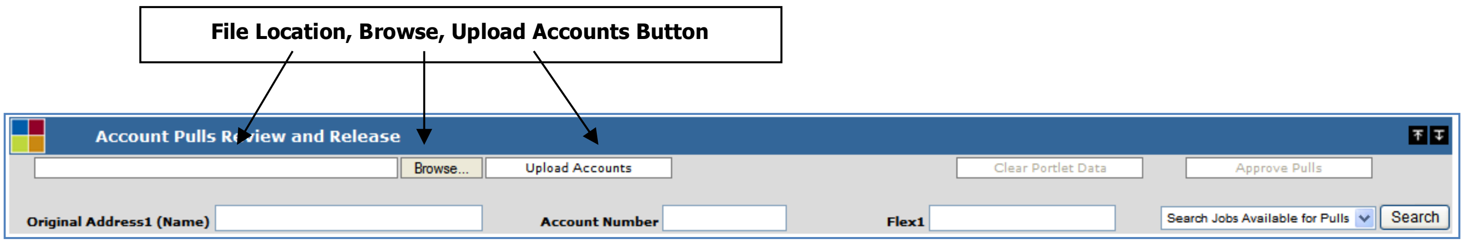


Main Services Toolbar (Account Pulls Selected)

Select **Account Pulls** from the Main Services Toolbar

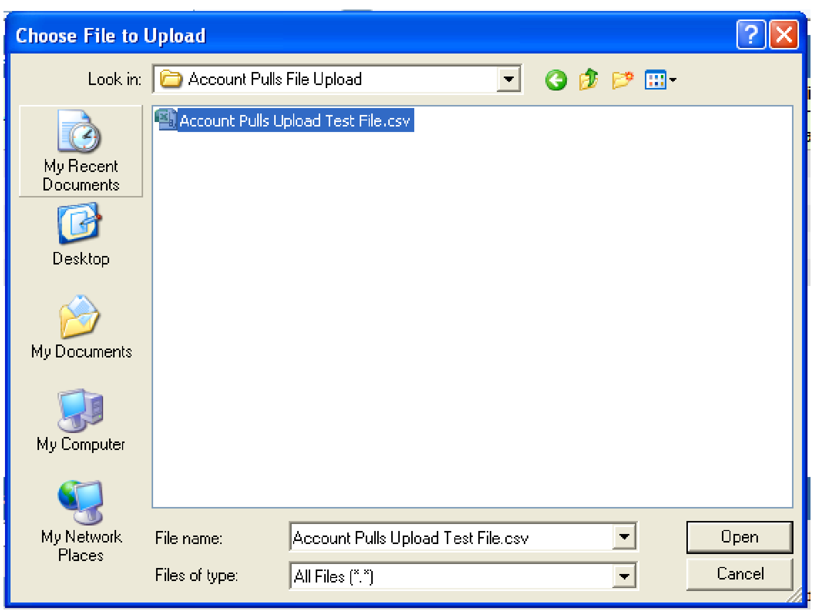
The **Upload Accounts** Feature contains three components:

- File Location
- Browse Button
- Upload Account Button



Account Pulls Review and Release Portlet

1. In the **Account Pulls Review and Release** Portlet, click on Browse. The following window will appear.



2. Locate the file to upload from your local system and click Open.
3. The file location will appear in the "File Location" box to the left of the Browse button in the **Account Pulls Review and Release** Portlet.
4. Click Upload Accounts in the **Account Pulls Review and Release** Portlet to import the file.

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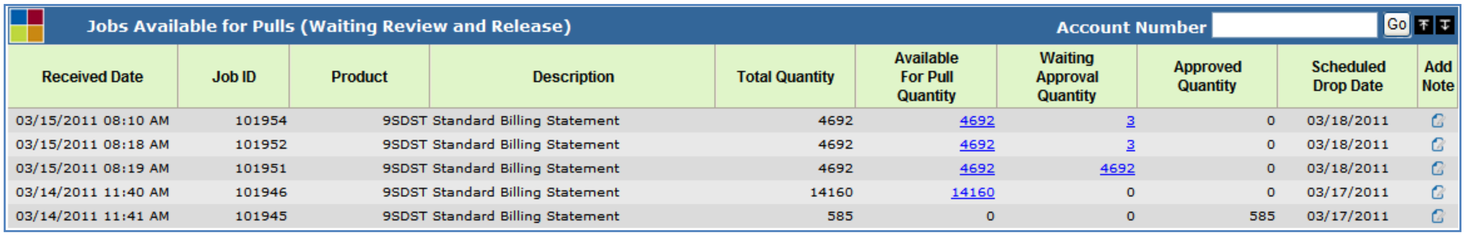
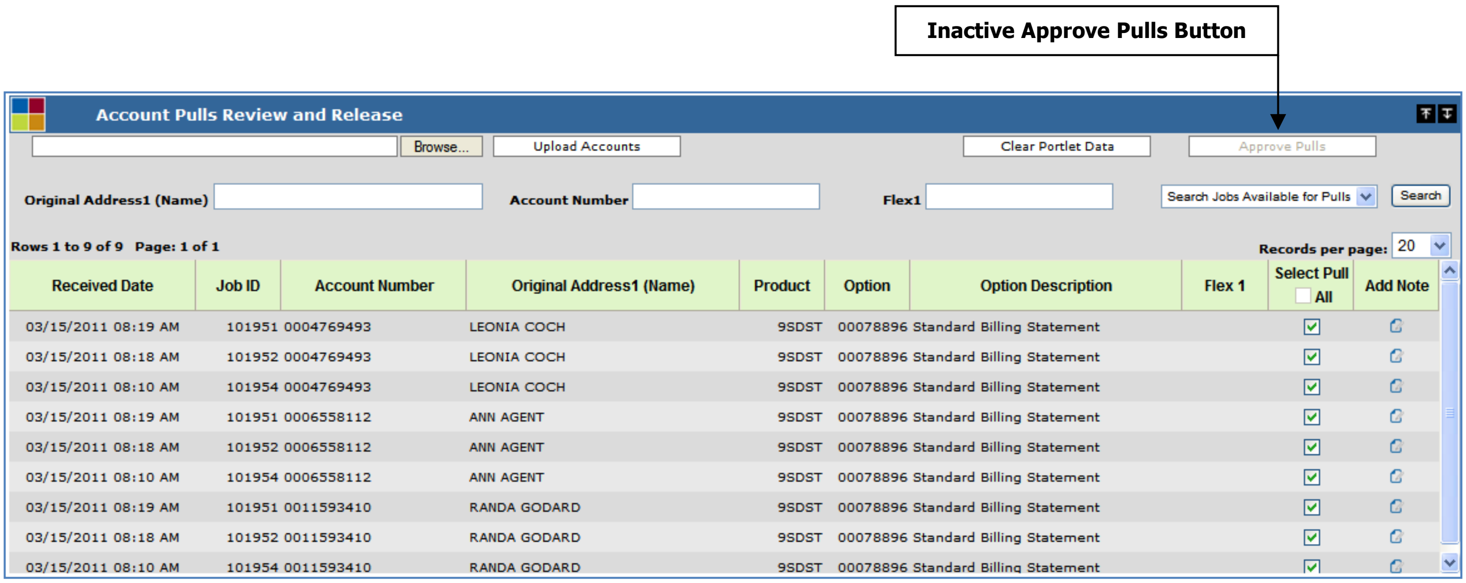

Jobs Available for Pulls (Waiting Review and Release)

Account Number [ ] Go

Received Date	Job ID	Product	Description	Total Quantity	Available For Pull Quantity	Waiting Approval Quantity	Approved Quantity	Scheduled Drop Date	Add Note
03/15/2011 08:10 AM	101954	9SDST	Standard Billing Statement	4692	4692	3	0	03/18/2011	
03/15/2011 08:18 AM	101952	9SDST	Standard Billing Statement	4692	4692	3	0	03/18/2011	
03/15/2011 08:19 AM	101951	9SDST	Standard Billing Statement	4692	4692	4692	0	03/18/2011	
03/14/2011 11:40 AM	101946	9SDST	Standard Billing Statement	14160	14160	0	0	03/17/2011	
03/14/2011 11:41 AM	101945	9SDST	Standard Billing Statement	585	0	0	585	03/17/2011	



Received Date	Job ID	Account Number	Original Address1 (Name)	Product	Option	Option Description	Flex 1	Select Pull All	Add Note
03/15/2011 08:19 AM	101951	0004769493	LEONIA COCH	9SDST	00078896	Standard Billing Statement		☑	
03/15/2011 08:18 AM	101952	0004769493	LEONIA COCH	9SDST	00078896	Standard Billing Statement		☑	
03/15/2011 08:10 AM	101954	0004769493	LEONIA COCH	9SDST	00078896	Standard Billing Statement		☑	
03/15/2011 08:19 AM	101951	0006558112	ANN AGENT	9SDST	00078896	Standard Billing Statement		☑	
03/15/2011 08:18 AM	101952	0006558112	ANN AGENT	9SDST	00078896	Standard Billing Statement		☑	
03/15/2011 08:10 AM	101954	0006558112	ANN AGENT	9SDST	00078896	Standard Billing Statement		☑	
03/15/2011 08:19 AM	101951	0011593410	RANDA GODARD	9SDST	00078896	Standard Billing Statement		☑	
03/15/2011 08:18 AM	101952	0011593410	RANDA GODARD	9SDST	00078896	Standard Billing Statement		☑	
03/15/2011 08:10 AM	101954	0011593410	RANDA GODARD	9SDST	00078896	Standard Billing Statement		☑	

Account Pulls Review and Release Portlet (Uploaded Accounts)

The **Account Pulls Review and Release** Portlet will be populated with the uploaded accounts. All uploaded accounts are automatically flagged for Pulls as indicated by green checkmark. The **Waiting Approval Quantity** in the **Jobs Available for Pulls (Waiting Review and Release)** Portlet will automatically update to reflect the quantity of uploaded accounts flagged for Pulls by **Job ID**.

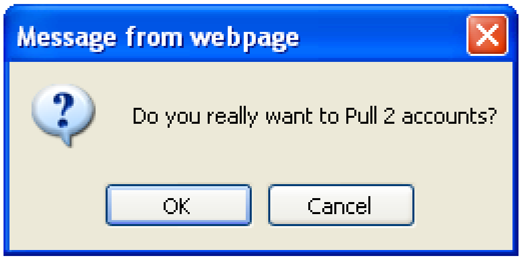
Also note, the **Approve Pulls** button is inactive providing Users with an opportunity to verify pulls **or** un-flag specific accounts before final action is taken.

5. To un-flag specific accounts:
   In the **Account Pulls Review and Release** Portlet, click the checkbox associated with the **Job ID/ Account Number** combination for each account to be un-flagged. The **Waiting Approval Quantity** in the **Jobs Available for Pulls (Waiting Review and Release)** Portlet will automatically update to reflect the quantity of uploaded accounts that remain flagged for Pulls by **Job ID**.

6. To approve pulls:
   In the **Jobs Available for Pulls (Waiting Review and Release)** Portlet, click the hyperlink associated with the **Job ID** under the **Waiting Approval Quantity** Data Header. The **Approve Pulls** button is now active for use in the **Account Pulls Review and Release** Portlet.

7. Click the **Approve Pulls** button.

   The following message will display:



8. To confirm, click OK.

9. Pulls must be approved for each **Job ID** by clicking the hyperlink under the **Waiting Approval Quantity** Data Header associated with that **Job ID**.

Jobs Available for Pulls (Waiting Review and Release) — Account Number

Received Date	Job ID	Product	Description	Total Quantity	Available For Pull Quantity	Waiting Approval Quantity	Approved Quantity	Scheduled Drop Date	Add Note
03/15/2011 08:10 AM	101954	9SDST	Standard Billing Statement	4692	4692	3	0	03/18/2011	
03/15/2011 08:18 AM	101952	9SDST	Standard Billing Statement	4692	4692	3	0	03/18/2011	
03/15/2011 08:19 AM	101951	9SDST	Standard Billing Statement	4692	4692	4692	0	03/18/2011	
03/14/2011 11:40 AM	101946	9SDST	Standard Billing Statement	14160	14160	0	0	03/17/2011	
03/14/2011 11:41 AM	101945	9SDST	Standard Billing Statement	585	0	0	585	03/17/2011	

Approved Pulls will display under the **Approved Quantity** Data Header in the **Jobs Available for Pulls (Waiting Review and Release)** Portlet.

Account Pulls History (Jobs Completed Portlet) — Job Id

Received Date	Job ID	Product	Description	Quantity Processed	Quantity Pulled	Pulls Approved By	Date Pulls Approved (CST)
03/11/2011 11:25 AM	101922	9SDST	Standard Billing Statement	7883	4	SALESDEMO	03/14/2011 04:21 PM
03/11/2011 11:32 AM	101925	9SDST	Standard Billing Statement	15264	5	SALESDEMO	03/14/2011 04:16 PM
03/11/2011 11:27 AM	101924	9SDST	Standard Billing Statement	991	7	SALESDEMO	03/14/2011 02:21 PM
03/04/2011 09:42 AM	101858	9SDST	Standard Billing Statement	1453	5	SALESDEMO	03/14/2011 02:18 PM
03/11/2011 11:27 AM	101924	9SDST	Standard Billing Statement	998	3	SALESDEMO	03/14/2011 02:17 PM
03/11/2011 11:32 AM	101925	9SDST	Standard Billing Statement	15269	3	SALESDEMO	03/14/2011 10:09 AM
03/04/2011 09:43 AM	101857	9SDST	Standard Billing Statement	1454	4	NCPMASTER	03/08/2011 11:14 AM

Account Pulls Review and Release Portlet (Cleared)

The **Account Pulls History Portlet** now displays the approved Pulls.

Once Pulls have been selected and approved for an account, a Job must be released through the **Review and Release Service**.

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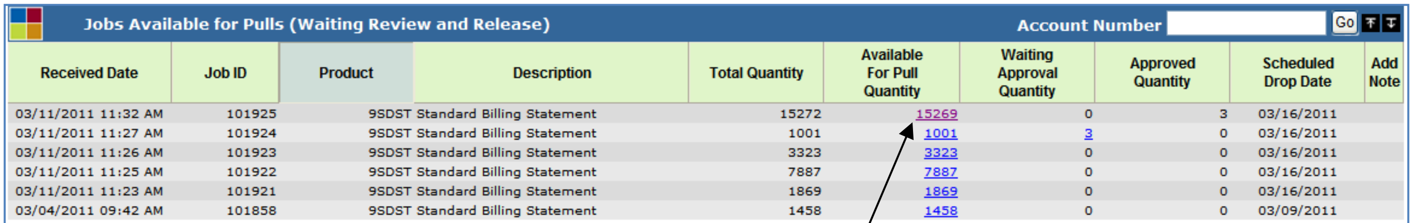
Flagging ALL Accounts for Pulls

The **Account Pulls** Service is accessed by clicking on the **Account Pulls** button on the Main Services Toolbar.

Main Services Toolbar (Account Pulls Selected)

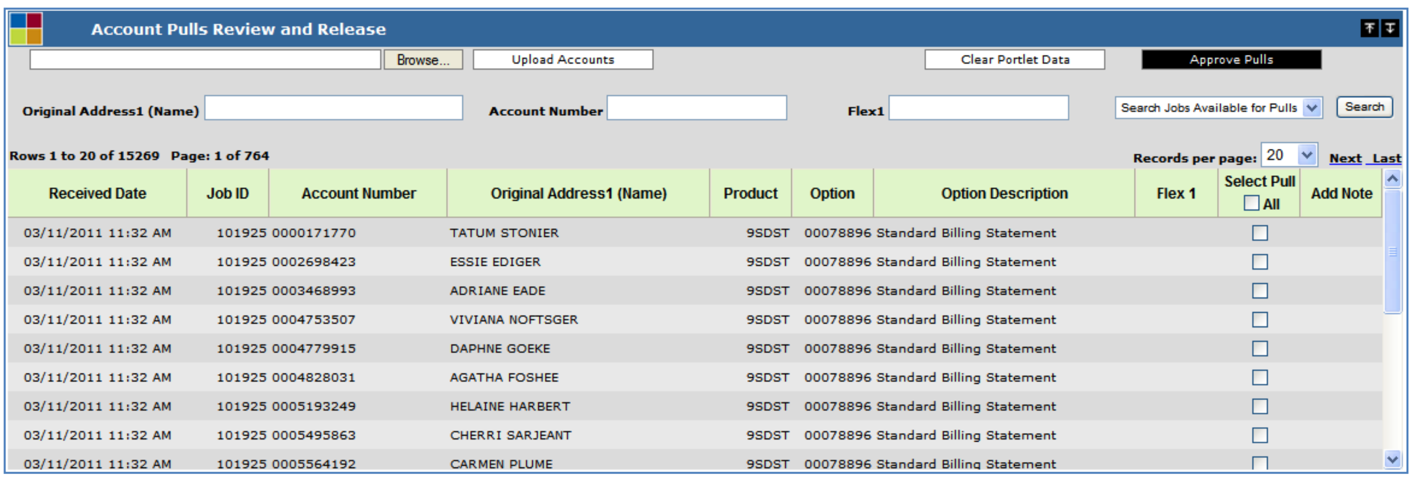
All Accounts available for Pulls are located within the **Jobs Available for Pulls (Waiting Review and Release)** Portlet:



Received Date	Job ID	Product	Description	Total Quantity	Available For Pull Quantity	Waiting Approval Quantity	Approved Quantity	Scheduled Drop Date	Add Note
03/11/2011 11:32 AM	101925	9SDST	Standard Billing Statement	15272	15269	0	3	03/16/2011	
03/11/2011 11:27 AM	101924	9SDST	Standard Billing Statement	1001	1001	3	0	03/16/2011	
03/11/2011 11:26 AM	101923	9SDST	Standard Billing Statement	3323	3323	0	0	03/16/2011	
03/11/2011 11:25 AM	101922	9SDST	Standard Billing Statement	7887	7887	0	0	03/16/2011	
03/11/2011 11:23 AM	101921	9SDST	Standard Billing Statement	1869	1869	0	0	03/16/2011	
03/04/2011 09:42 AM	101858	9SDST	Standard Billing Statement	1458	1458	0	0	03/09/2011	

Jobs Available for Pulls (Waiting Review and Release) Portlet

1. Locate **Job ID** for which ALL Accounts should be Pulled.
2. Click the hyperlink under the **Available for Pull Quantity** Data Header that corresponds with the **Job ID.**

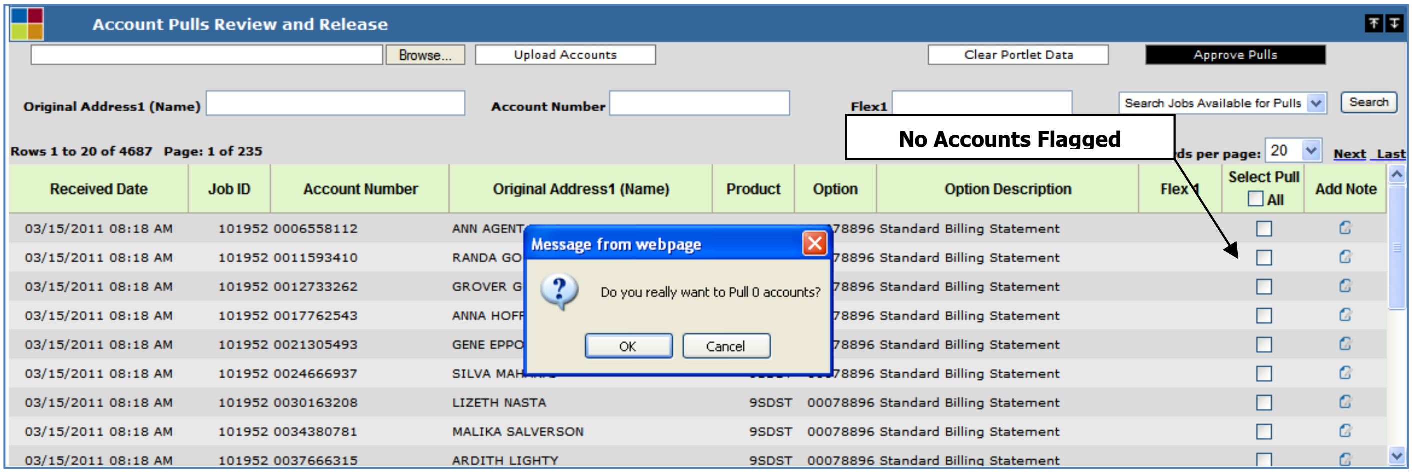


Received Date	Job ID	Account Number	Original Address1 (Name)	Product	Option	Option Description	Flex 1	Select Pull All	Add Note
03/11/2011 11:32 AM	101925	0000171770	TATUM STONIER	9SDST	00078896	Standard Billing Statement			
03/11/2011 11:32 AM	101925	0002698423	ESSIE EDIGER	9SDST	00078896	Standard Billing Statement			
03/11/2011 11:32 AM	101925	0003468993	ADRIANE EADE	9SDST	00078896	Standard Billing Statement			
03/11/2011 11:32 AM	101925	0004753507	VIVIANA NOFTSGER	9SDST	00078896	Standard Billing Statement			
03/11/2011 11:32 AM	101925	0004779915	DAPHNE GOEKE	9SDST	00078896	Standard Billing Statement			
03/11/2011 11:32 AM	101925	0004828031	AGATHA FOSHEE	9SDST	00078896	Standard Billing Statement			
03/11/2011 11:32 AM	101925	0005193249	HELAINE HARBERT	9SDST	00078896	Standard Billing Statement			
03/11/2011 11:32 AM	101925	0005495863	CHERRI SARJEANT	9SDST	00078896	Standard Billing Statement			
03/11/2011 11:32 AM	101925	0005564192	CARMEN PLUME	9SDST	00078896	Standard Billing Statement			

Account Pulls Review and Release Portlet

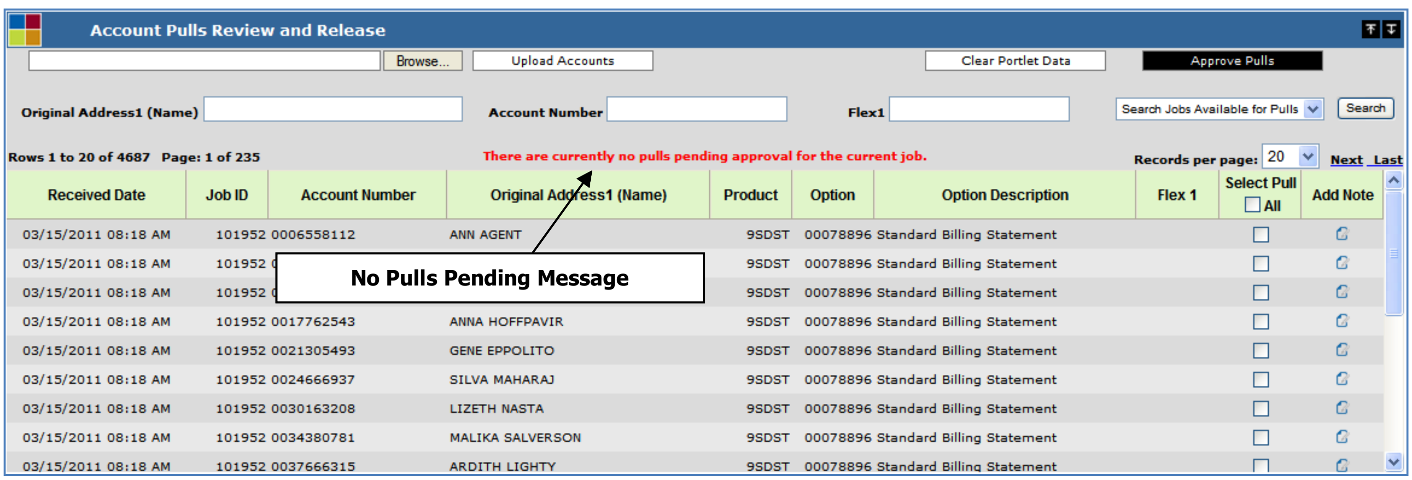
The **Account Pulls Review and Release** Portlet will populate with ALL accounts associated with this **Job**.

If a User clicks the Approve Pulls button in the **Account Pulls Review and Release** Portlet prior to flagging accounts, the following message will display:

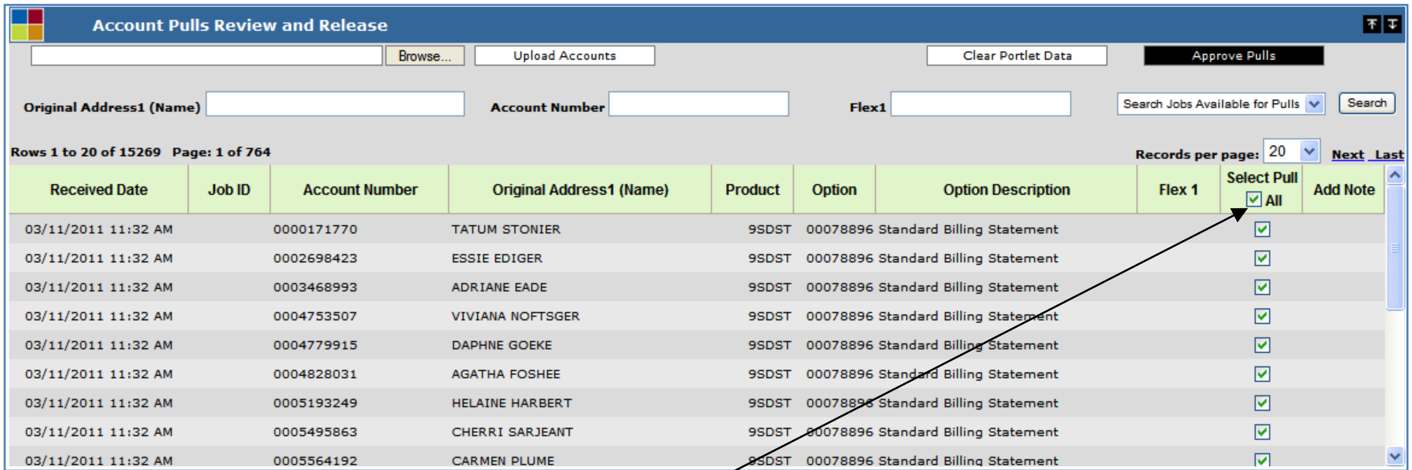


Account Pulls Review and Release Portlet with NO Accounts Flagged for Pulls

Clicking OK will display a message in the **Account Pulls Review and Release** Portlet, indicating that "There are currently no pulls pending approval for the current job".



Account Pulls Review and Release Portlet with "No Pulls Pending" Message



Account Pulls Review and Release

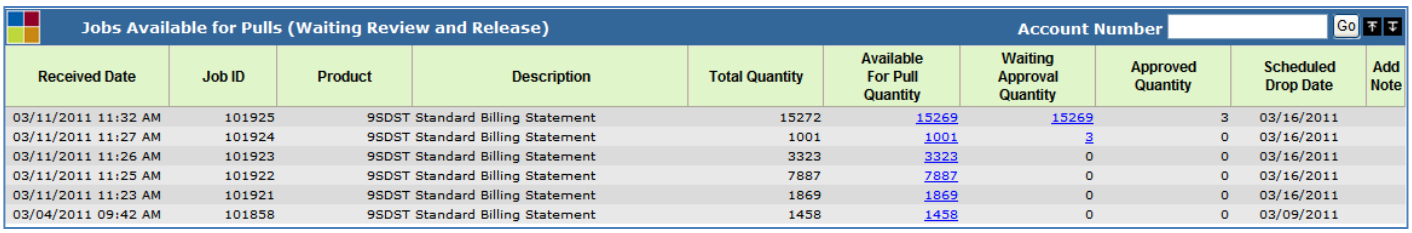
Original Address1 (Name) | Account Number | Flex1

Rows 1 to 20 of 15269 Page: 1 of 764 — Records per page: 20 Next Last

Received Date	Job ID	Account Number	Original Address1 (Name)	Product	Option	Option Description	Flex 1	Select Pull All	Add Note
03/11/2011 11:32 AM		0000171770	TATUM STONIER	9SDST	00078896	Standard Billing Statement		☑	
03/11/2011 11:32 AM		0002698423	ESSIE EDIGER	9SDST	00078896	Standard Billing Statement		☑	
03/11/2011 11:32 AM		0003468993	ADRIANE EADE	9SDST	00078896	Standard Billing Statement		☑	
03/11/2011 11:32 AM		0004753507	VIVIANA NOFTSGER	9SDST	00078896	Standard Billing Statement		☑	
03/11/2011 11:32 AM		0004779915	DAPHNE GOEKE	9SDST	00078896	Standard Billing Statement		☑	
03/11/2011 11:32 AM		0004828031	AGATHA FOSHEE	9SDST	00078896	Standard Billing Statement		☑	
03/11/2011 11:32 AM		0005193249	HELAINE HARBERT	9SDST	00078896	Standard Billing Statement		☑	
03/11/2011 11:32 AM		0005495863	CHERRI SARJEANT	9SDST	00078896	Standard Billing Statement		☑	
03/11/2011 11:32 AM		0005564192	CARMEN PLUME	9SDST	00078896	Standard Billing Statement		☑	

Account Pulls Review and Release Portlet with ALL Accounts Selected

3. To select ALL Accounts, check the All box in the **Select Pull** Data Header.



Jobs Available for Pulls (Waiting Review and Release) Account Number

Received Date	Job ID	Product	Description	Total Quantity	Available For Pull Quantity	Waiting Approval Quantity	Approved Quantity	Scheduled Drop Date	Add Note
03/11/2011 11:32 AM	101925	9SDST	Standard Billing Statement	15272	15269	15269	3	03/16/2011	
03/11/2011 11:27 AM	101924	9SDST	Standard Billing Statement	1001	1001	3	0	03/16/2011	
03/11/2011 11:26 AM	101923	9SDST	Standard Billing Statement	3323	3323	0	0	03/16/2011	
03/11/2011 11:25 AM	101922	9SDST	Standard Billing Statement	7887	7887	0	0	03/16/2011	
03/11/2011 11:23 AM	101921	9SDST	Standard Billing Statement	1869	1869	0	0	03/16/2011	
03/04/2011 09:42 AM	101858	9SDST	Standard Billing Statement	1458	1458	0	0	03/09/2011	

Jobs Available for Pulls (Waiting Review and Release) Portlet with Waiting Approval Quantity

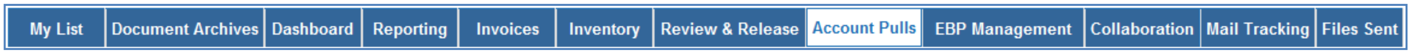
The **Waiting Approval Quantity** column in the **Jobs Available for Pulls (Waiting Review and Release)** Portlet will automatically update to reflect quantity of accounts flagged for Pulls. The **Available for Pull Quantity** and the **Waiting Approval Quantity** should now be the same.

NOTE: If you check the Select Pull All button in error, click it again to deselect all Accounts. If there are select accounts that should still produce, they can be unchecked prior to approving pulls. The **Jobs Available for Pulls (Waiting Review and Release)** Portlet will automatically update. The **Waiting Approval Quantity** will return to 0. The **Account Pulls Review and Release** Portlet will clear.

Flagged accounts are now ready to be approved. Please see the **Approve Account Pulls** section of this document by clicking here (if viewing electronically).

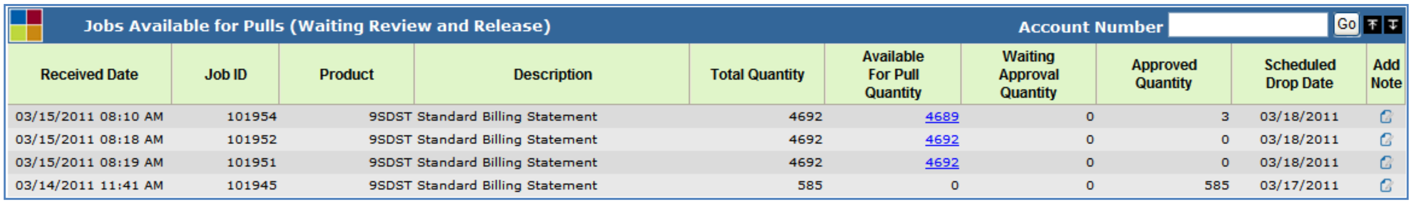
Flagging Individual Accounts for Pulls

The **Account Pulls** Service is accessed by clicking on the **Account Pulls** button on the Main Services Toolbar.



Main Services Toolbar (Account Pulls Selected)

All Accounts available for Pulls are located within the **Jobs Available for Pulls** Portlet:



Jobs Available for Pulls (Waiting Review and Release) — Account Number [Go]

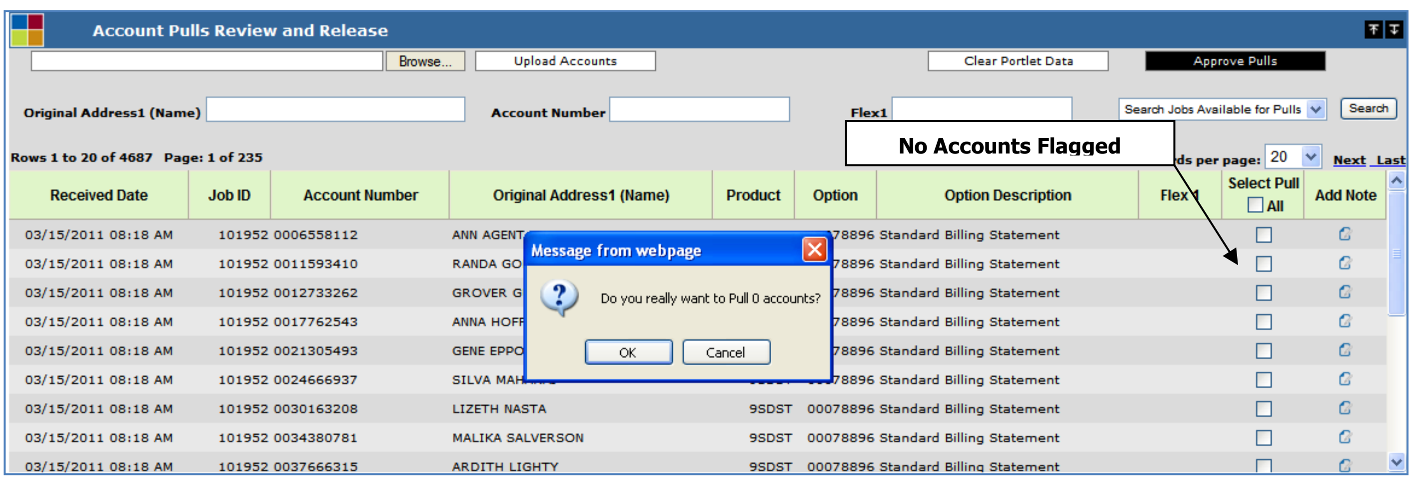
Received Date	Job ID	Product	Description	Total Quantity	Available For Pull Quantity	Waiting Approval Quantity	Approved Quantity	Scheduled Drop Date	Add Note
03/15/2011 08:10 AM	101954	9SDST	Standard Billing Statement	4692	4689	0	3	03/18/2011	
03/15/2011 08:18 AM	101952	9SDST	Standard Billing Statement	4692	4692	0	0	03/18/2011	
03/15/2011 08:19 AM	101951	9SDST	Standard Billing Statement	4692	4692	0	0	03/18/2011	
03/14/2011 11:41 AM	101945	9SDST	Standard Billing Statement	585	0	0	585	03/17/2011	

Jobs Available for Pulls (Waiting Review and Release) Portlet

1. Locate **Job ID** for which ALL Accounts should be Pulled.
2. Click the hyperlink under the **Available for Pull Quantity** Data Header that corresponds with the **Job ID.**

The **Account Pulls Review and Release** Portlet will be populated with ALL accounts associated with this job.

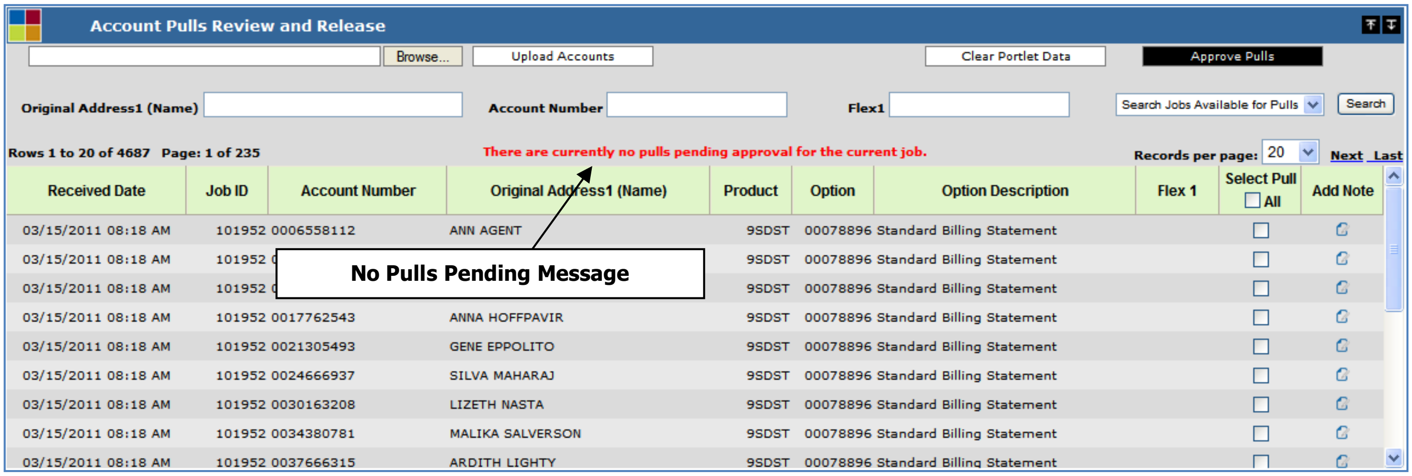
If a User clicks the Approve Pulls button in the **Account Pulls Review and Release** Portlet prior to flagging accounts, the following message will display:



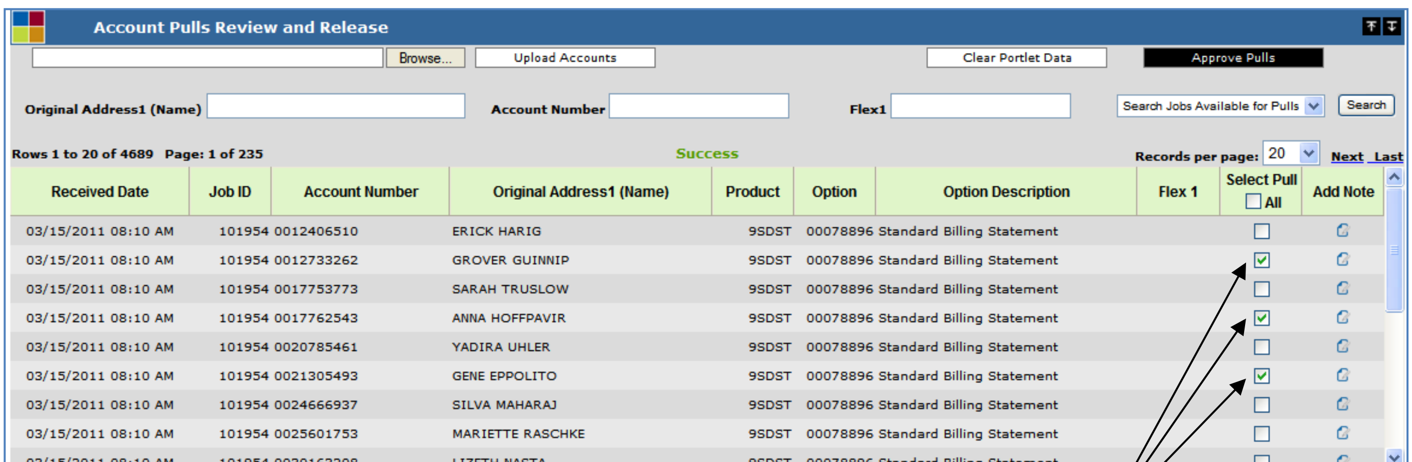
Received Date	Job ID	Account Number	Original Address1 (Name)	Product	Option	Option Description	Flex 1	Select Pull All	Add Note
03/15/2011 08:18 AM	101952	0006558112	ANN AGENT			78896 Standard Billing Statement			
03/15/2011 08:18 AM	101952	0011593410	RANDA GO			78896 Standard Billing Statement			
03/15/2011 08:18 AM	101952	0012733262	GROVER G			78896 Standard Billing Statement			
03/15/2011 08:18 AM	101952	0017762543	ANNA HOFF			78896 Standard Billing Statement			
03/15/2011 08:18 AM	101952	0021305493	GENE EPPO			78896 Standard Billing Statement			
03/15/2011 08:18 AM	101952	0024666937	SILVA MAH			78896 Standard Billing Statement			
03/15/2011 08:18 AM	101952	0030163208	LIZETH NASTA	9SDST	00078896	Standard Billing Statement			
03/15/2011 08:18 AM	101952	0034380781	MALIKA SALVERSON	9SDST	00078896	Standard Billing Statement			
03/15/2011 08:18 AM	101952	0037666315	ARDITH LIGHTY	9SDST	00078896	Standard Billing Statement			

Account Pulls Review and Release Portlet with NO Accounts Flagged for Pulls

Clicking OK will display a message in the **Account Pulls Review and Release** Portlet, indicating that "There are currently no pulls pending approval for the current job."

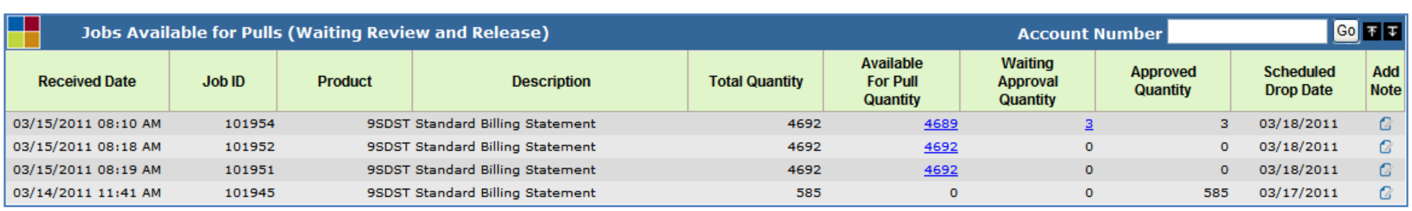


Account Pulls Review and Release Portlet with "No Pulls Pending" Message



Account Pulls Review and Release Portlet (Individual Accounts Selected for Pulls)

3. To select individual accounts associated with a **Job ID**, locate the account number and click the corresponding checkbox in the under the **Select Pull** Data Header.



Jobs Available for Pulls (Waiting Review and Release) Portlet with Updated Waiting Approval Quantity

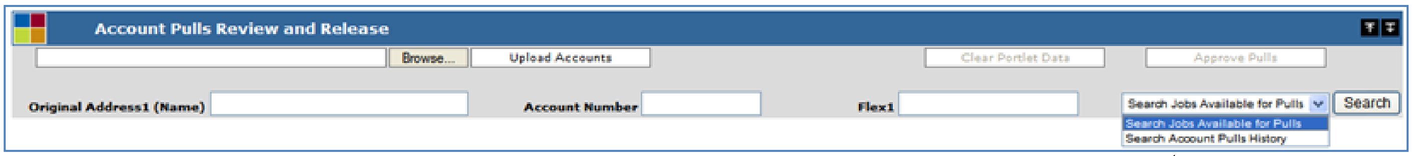
The **Waiting Approval Quantity** column in the **Jobs Available for Pulls (Waiting Review and Release)** Portlet will automatically update to reflect quantity of accounts flagged for Pulls.

NOTE: If you check the Select Pull box associated with a specific account in error, click it again to deselect that account. The **Waiting Approval Quantity** in the **Jobs Available for Pulls (Waiting Review and Release)** Portlet will automatically update.

Flagged accounts are now ready to be approved. Please see the **Approve Account Pulls** section of this document by clicking here (if viewing electronically).

Flagging Accounts by Search Values

The **Account Pulls Review and Release** Portlet in the **Account Pulls** Service provides Users with the ability to search the **Jobs Available for Pulls** Portlet and the **Account Pulls History** Portlet for specific accounts by utilizing search functions.

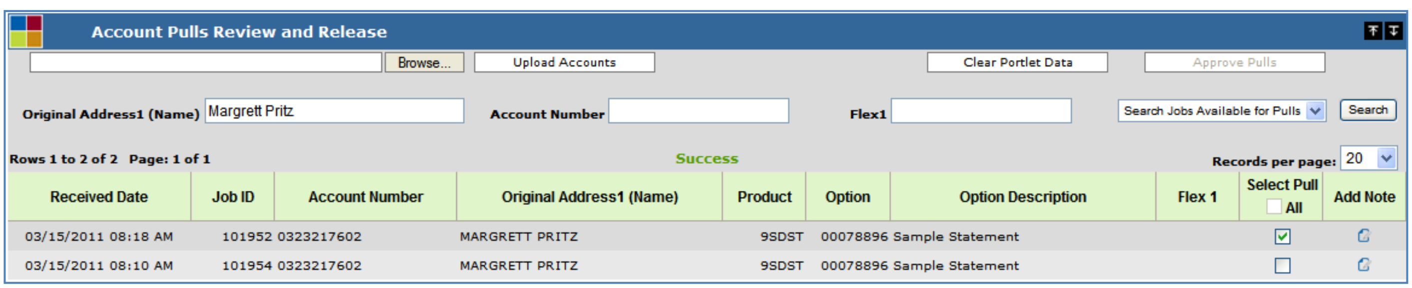


Account Pulls Review and Release Portlet

Portlet Option Dropdown Box

Search Functions Include:

- **Upload Accounts** – Please refer to the **How to Upload Accounts** section of this document or click here (if viewing electronically)
- **Portlet Option Dropdown Box**
- **OriginalAddress1 Search Box**
- **Account Number Search Box**
- **Flex1 Search Box** – Flex1 is a personalized, Client defined field

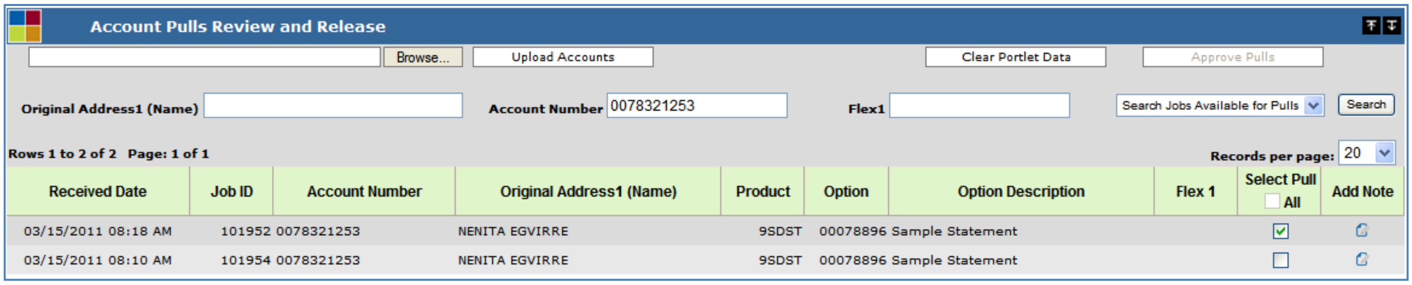


Account Pulls Review and Release Portlet, Original Address1 Search

To search by **Original Address1:**

1. The User must specify which Portlet to search by selecting either "Search Jobs Available for Pulls" or "Search Account Pulls History" in the **Portlet Option Dropdown Box.**
2. Enter the appropriate information in the **Original Address1** Search Box.
3. Click the Search button.
4. The **Account Pulls Review and Release** Portlet will populate with all **Job ID(s)** associated with this account that are available for Pulls.
5. To flag individual accounts for Pulls, click the checkbox associated with the account.
6. To flag ALL accounts for Pulls, click the "ALL" checkbox in the **Select Pull** Data Header.

NOTE: All Search Box fields support wildcard searches and will return results whether the User enters complete values or partial values.



Account Pulls Review and Release Portlet, Account Number Search

To search the **Jobs Available for Pulls (Waiting Review and Release)** Portlet by **Account Number:**

1. The User must specify which Portlet to search by selecting either "Search Jobs Available for Pulls" or "Search Account Pulls History" in the **Portlet Option Dropdown Box.**
2. Enter the appropriate information in the **Account Number** Search Box.
3. Click the Search button.
4. The **Account Pulls Review and Release** Portlet will populate with all **Job ID(s)** associated with this account that are available for Pulls.
5. To flag individual accounts for Pulls, click the checkbox associated with the account.
6. To flag ALL accounts for Pulls, click the "ALL" checkbox in the **Select Pull** Data Header.

NOTE: All Search Box fields support wildcard searches and will return results whether the User enters complete values or partial values.

Account Pulls Review and Release Portlet, Flex1 Search (not shown, Client Specific)

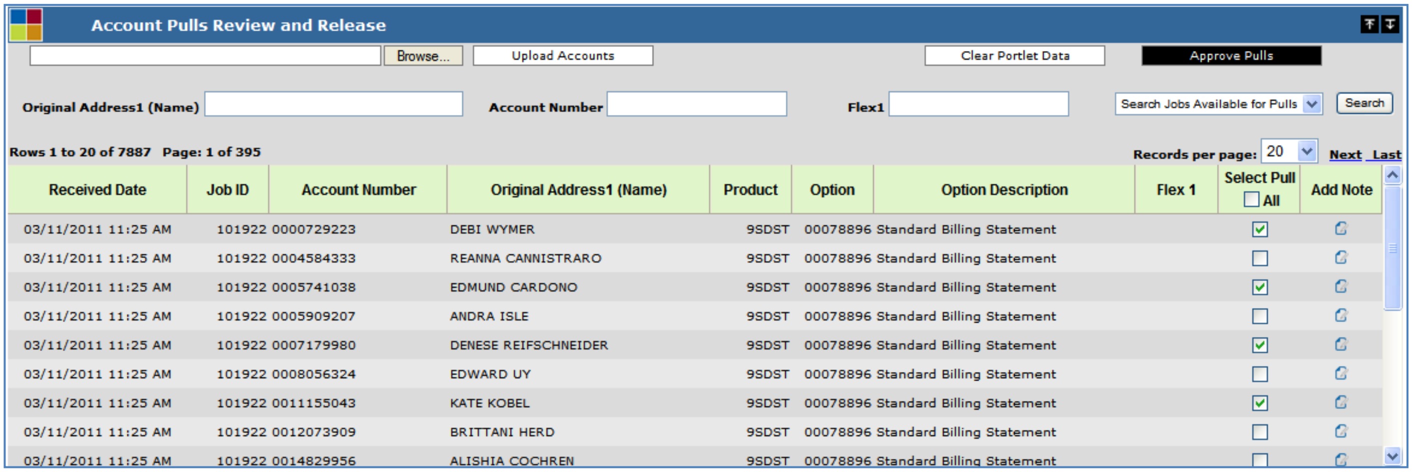
To search the **Jobs Available for Pulls (Waiting Review and Release)** Portlet by **Flex1:**

1. The User must specify which Portlet to search by selecting either "Search Jobs Available for Pulls" or "Search Account Pulls History" in the **Portlet Option Dropdown Box.**
2. Enter the appropriate information in the **Flex1** Search box.
3. Click the Search button.
4. The **Account Pulls Review and Release** Portlet will populate with all **Job ID(s)** associated with this account that are available for Pulls.
5. To flag individual accounts for Pulls, click the checkbox associated with the account.
6. To flag ALL accounts for Pulls, click the "ALL" checkbox in the **Select Pull** Data Header.

NOTE: All Search Box fields support wildcard searches and will return results whether the User enters complete values or partial values.

Approving Account Pulls

Account Pulls must be approved before a **Job** can be released. The following steps must be taken to approve Account Pulls.

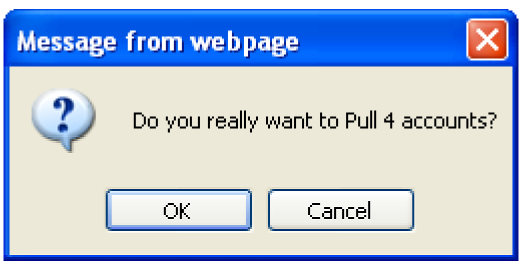


Received Date	Job ID	Account Number	Original Address1 (Name)	Product	Option	Option Description	Flex 1	Select Pull All	Add Note
03/11/2011 11:25 AM	101922	0000729223	DEBI WYMER	9SDST	00078896	Standard Billing Statement		☑	
03/11/2011 11:25 AM	101922	0004584333	REANNA CANNISTRARO	9SDST	00078896	Standard Billing Statement		☐	
03/11/2011 11:25 AM	101922	0005741038	EDMUND CARDONO	9SDST	00078896	Standard Billing Statement		☑	
03/11/2011 11:25 AM	101922	0005909207	ANDRA ISLE	9SDST	00078896	Standard Billing Statement		☐	
03/11/2011 11:25 AM	101922	0007179980	DENESE REIFSCHNEIDER	9SDST	00078896	Standard Billing Statement		☑	
03/11/2011 11:25 AM	101922	0008056324	EDWARD UY	9SDST	00078896	Standard Billing Statement		☐	
03/11/2011 11:25 AM	101922	0011155043	KATE KOBEL	9SDST	00078896	Standard Billing Statement		☑	
03/11/2011 11:25 AM	101922	0012073909	BRITTANI HERD	9SDST	00078896	Standard Billing Statement		☐	
03/11/2011 11:25 AM	101922	0014829956	ALISHIA COCHREN	9SDST	00078896	Standard Billing Statement		☐	

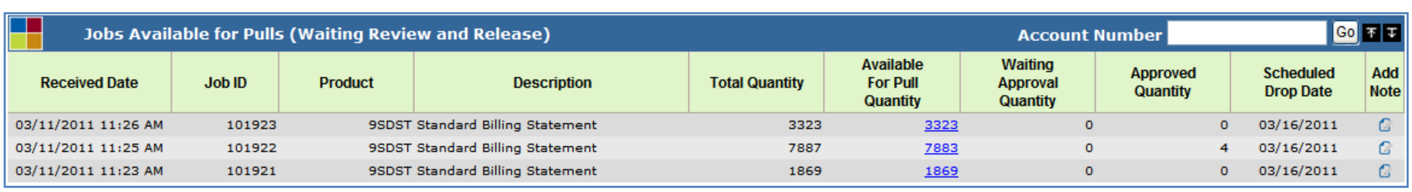
Account Pulls Review and Release Portlet reflecting Individual Accounts to be Pulled

- Once Accounts to be Pulled have been selected, click the **Approve Pulls** button in the **Account Pulls Review and Release** Portlet.

The following confirmation message will be displayed:



- To confirm, click OK.



Received Date	Job ID	Product	Description	Total Quantity	Available For Pull Quantity	Waiting Approval Quantity	Approved Quantity	Scheduled Drop Date	Add Note
03/11/2011 11:26 AM	101923	9SDST	Standard Billing Statement	3323	3323	0	0	03/16/2011	
03/11/2011 11:25 AM	101922	9SDST	Standard Billing Statement	7887	7883	0	4	03/16/2011	
03/11/2011 11:23 AM	101921	9SDST	Standard Billing Statement	1869	1869	0	0	03/16/2011	

Jobs Available for Pulls (Waiting Review and Release) reflecting Approved Account Pulls

The **Approved Quantity** in the **Jobs Available for Pulls** Portlet will automatically update to reflect the approval.

Account Pulls History (Jobs Completed Portlet) Job Id Go

Received Date	Job ID	Product	Description	Quantity Processed	Quantity Pulled	Pulls Approved By	Date Pulls Approved (CST)
03/11/2011 11:25 AM	101922	9SDST	Standard Billing Statement	7883	4	SALESDEMO	03/14/2011 04:21 PM
03/11/2011 11:32 AM	101925	9SDST	Standard Billing Statement	15264	5	SALESDEMO	03/14/2011 04:16 PM
03/11/2011 11:27 AM	101924	9SDST	Standard Billing Statement	991	7	SALESDEMO	03/14/2011 02:21 PM
03/04/2011 09:42 AM	101858	9SDST	Standard Billing Statement	1453	5	SALESDEMO	03/14/2011 02:18 PM
03/11/2011 11:27 AM	101924	9SDST	Standard Billing Statement	998	3	SALESDEMO	03/14/2011 02:17 PM
03/11/2011 11:32 AM	101925	9SDST	Standard Billing Statement	15269	3	SALESDEMO	03/14/2011 10:09 AM
03/04/2011 09:43 AM	101857	9SDST	Standard Billing Statement	1454	4	NCPMASTER	03/08/2011 11:14 AM

Account Pulls Review and Release Portlet (Cleared)

The **Account Pulls History Portlet** now displays the approved Pulls.

Once all Pulls have been selected and approved for an account, a **Job** must be released through the **Review and Release** Service.

Flagging Account Pulls Through Review and Release

Account Pulls can be flagged for Pulls through the **Review and Release** Service.

My List	Document Archives	Dashboard	Reporting	Invoices	Inventory	Review & Release	Account Pulls	EBP Management	Collaboration	Mail Tracking	Files Sent

1. Select **Review and Release** from the Main Services Toolbar

Jobs Pending Review and Release (R&R)

Job	Product or Option	Description	Qty	Sample Qty	Received Date	Scheduled Drop Date	View Sample	Auto Release Time (CST)	Action
+ 101945								N/A	Approve Hold Re-Sample
+ 101946								N/A	Approve Hold Re-Sample
+ 101951								N/A	Approve Hold Re-Sample
+ 101952								N/A	Approve Hold Re-Sample
+ 101953								N/A	Approve Hold Re-Sample
+ 101954								N/A	Approve Hold Re-Sample

Jobs Pending Review and Release Portlet

2. Click the **Job ID** hyperlink.

Job Details

Site	File	Tracking ID	Job ID	Product	Option	Description	Status	Quantity	Reject Quantity	Received Date	Scheduled Drop Date	Actual Drop Date	Sample
BHM	600_byte_draft_20110313060143.txt	1002379	101945	9SDST	00078896	Standard Billing Statement	Processed	585	0	2011-03-14 11:41:00.0	03/17/2011		

Jobs Details Portlet

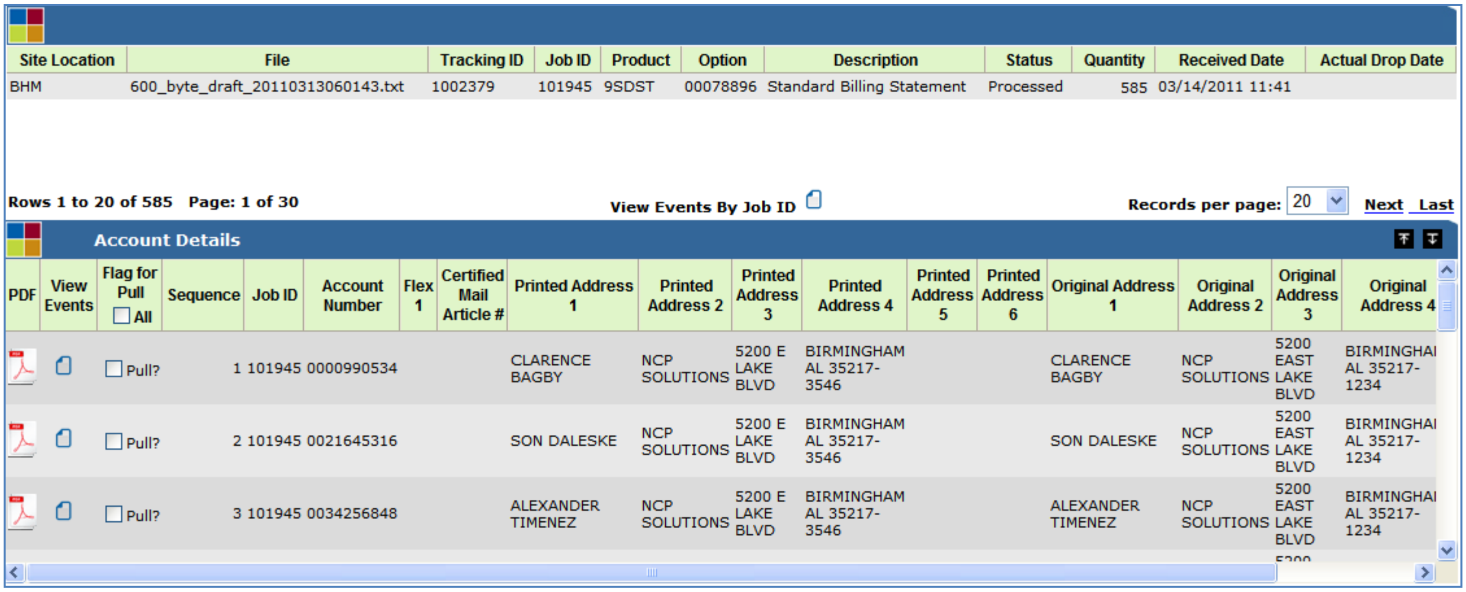
3. If there are Accounts available for Pulls associated with a **Job**, the **Option** number will be hyperlinked. Click the Option hyperlink.

Job Details

Site	File	Tracking ID	Job ID	Product	Option	Description	Status	Quantity	Reject Quantity	Received Date	Scheduled Drop Date	Actual Drop Date	Sample
BHM	600_byte_draft_20110315060137.txt	1002400	101953	9SDST	00078896	Standard Billing Statement	Processed	4692	0	2011-03-15 08:17:00.0	03/18/2011		

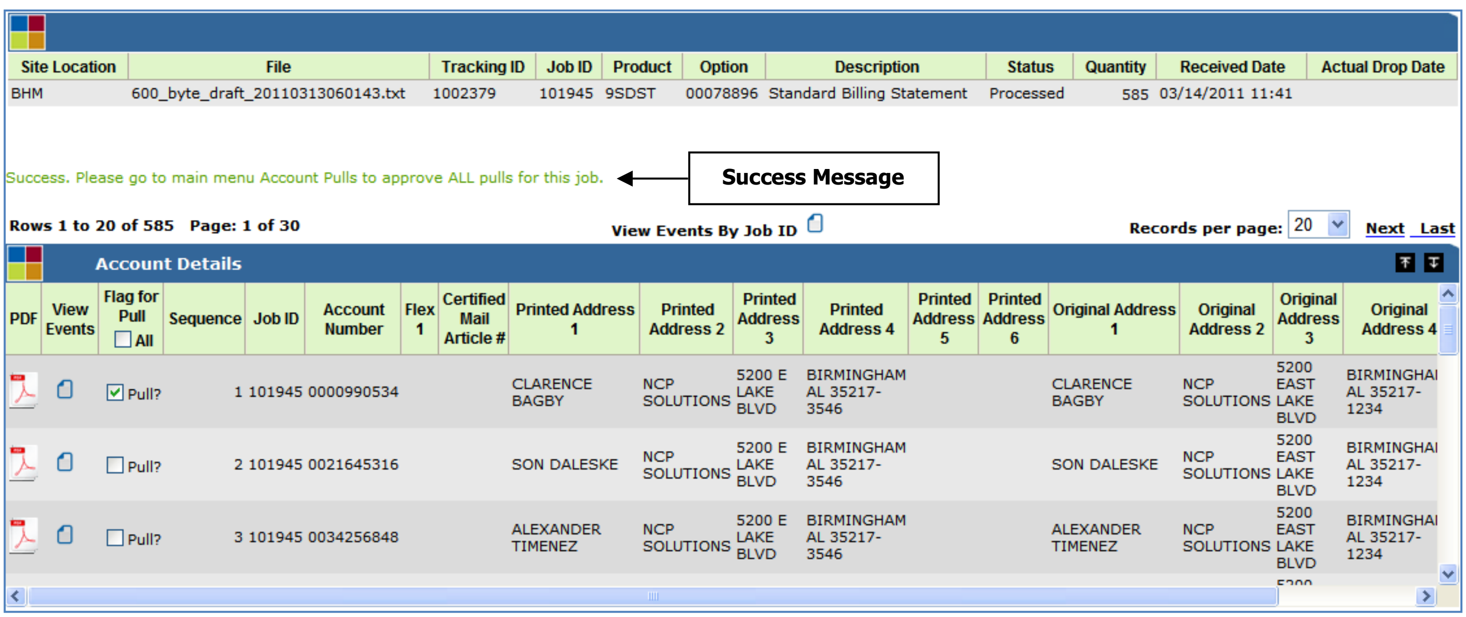
Job Details Portlet

4. If there are no accounts available for Pulls associated with the selected **Job**, the **Option** number will not be hyperlinked.



Account Details Portlet

5. The **Account Details** Portlet will be displayed.
6. Select individual accounts to "Flag for Pull" by clicking the checkbox associated with the account.
7. ALL accounts associated with a **Job** can be flagged by checking the "ALL" box in the **Flag for Pull** Data Header.



Account Details Portlet

8. Once accounts are flagged, a message will appear directing the User to the **Account Pulls** Service for approval.

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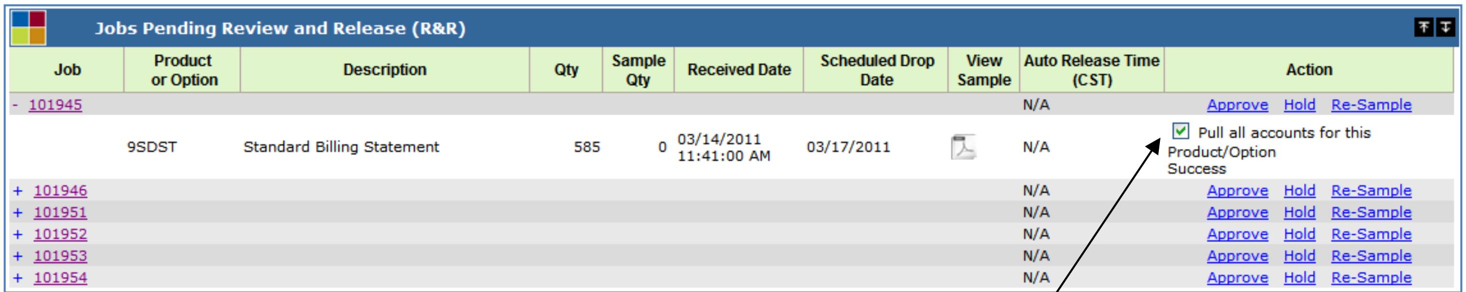
Flagging All Accounts for Products/Options Through Review and Release

The **Jobs Pending Review and Release Portlet** in the **Review and Release** Service offers Users an alternative method of flagging ALL accounts for a specific Product/Option associated with a Job.

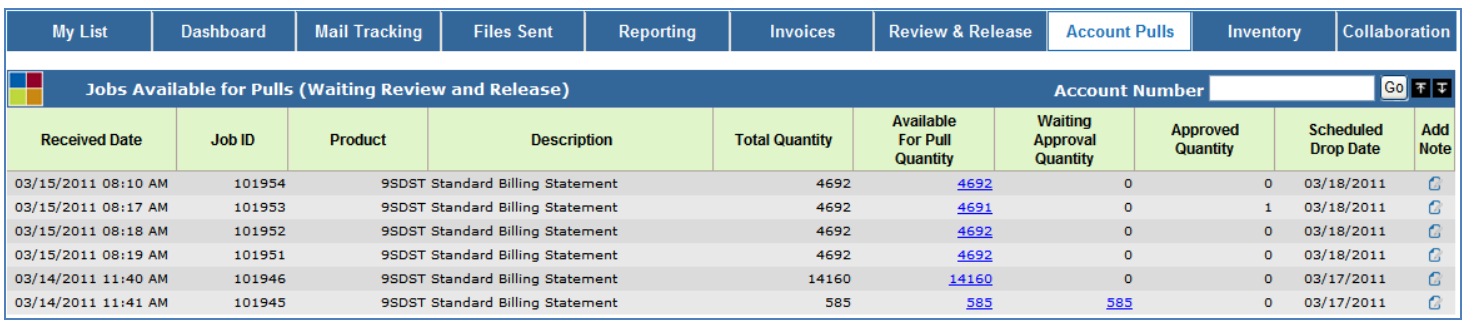


Jobs Pending Review and Release (R&R)

Job	Product or Option	Description	Qty	Sample Qty	Received Date	Scheduled Drop Date	View Sample	Auto Release Time (CST)	Action
- 101945								N/A	Approve Hold Re-Sample
	9SDST	Standard Billing Statement	585	0	03/14/2011 11:41:00 AM	03/17/2011		N/A	Pull all accounts for this Product/Option Success
+ 101946								N/A	Approve Hold Re-Sample
+ 101951								N/A	Approve Hold Re-Sample
+ 101952								N/A	Approve Hold Re-Sample
+ 101953								N/A	Approve Hold Re-Sample
+ 101954								N/A	Approve Hold Re-Sample

Jobs Pending Review and Release Portlet

1. Expand a **Job** by clicking the + to the left of the **Job** number.
2. Check the "Pull all accounts for this Product/Option."
3. All accounts for this Product/Option have now been flagged to be Pulled and must be approved through the **Account Pulls** Service.
4. Click the **Account Pulls** button on the Main Services Toolbar.



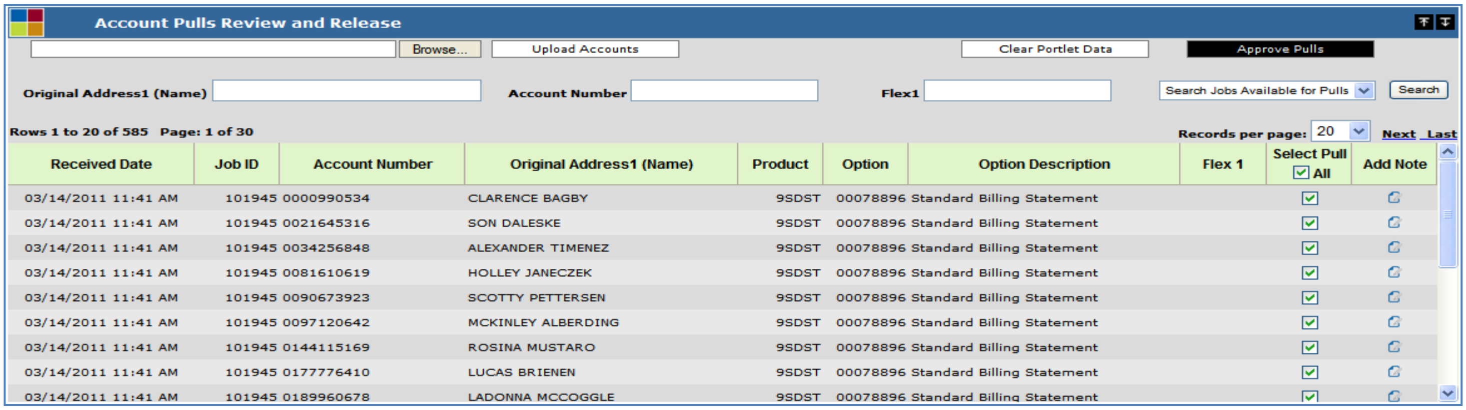
My List | Dashboard | Mail Tracking | Files Sent | Reporting | Invoices | Review & Release | Account Pulls | Inventory | Collaboration

Jobs Available for Pulls (Waiting Review and Release) — Account Number — Go

Received Date	Job ID	Product	Description	Total Quantity	Available For Pull Quantity	Waiting Approval Quantity	Approved Quantity	Scheduled Drop Date	Add Note
03/15/2011 08:10 AM	101954	9SDST	Standard Billing Statement	4692	4692	0	0	03/18/2011	
03/15/2011 08:17 AM	101953	9SDST	Standard Billing Statement	4692	4691	0	1	03/18/2011	
03/15/2011 08:18 AM	101952	9SDST	Standard Billing Statement	4692	4692	0	0	03/18/2011	
03/15/2011 08:19 AM	101951	9SDST	Standard Billing Statement	4692	4692	0	0	03/18/2011	
03/14/2011 11:40 AM	101946	9SDST	Standard Billing Statement	14160	14160	0	0	03/17/2011	
03/14/2011 11:41 AM	101945	9SDST	Standard Billing Statement	585	585	585	0	03/17/2011	

Jobs Available for Pulls (Waiting Review and Release) Portlet

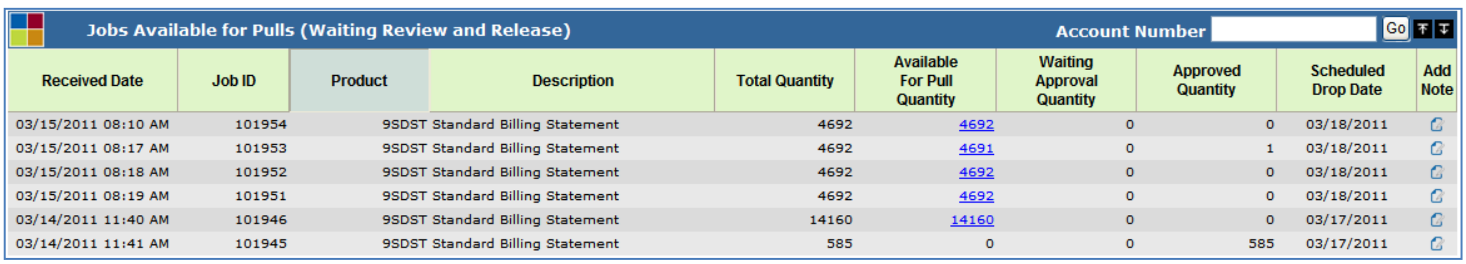
5. The **Waiting Approval Quantity** in the **Jobs Available for Pulls** Portlet automatically updates to reflect that all accounts for this Product/Option have been flagged.
6. Click the hyperlink associated with the **Job ID** under the **Waiting Approval Quantity** Data Header.



Received Date	Job ID	Account Number	Original Address1 (Name)	Product	Option	Option Description	Flex 1	Select Pull All	Add Note
03/14/2011 11:41 AM	101945	0000990534	CLARENCE BAGBY	9SDST	00078896	Standard Billing Statement		☑	
03/14/2011 11:41 AM	101945	0021645316	SON DALESKE	9SDST	00078896	Standard Billing Statement		☑	
03/14/2011 11:41 AM	101945	0034256848	ALEXANDER TIMENEZ	9SDST	00078896	Standard Billing Statement		☑	
03/14/2011 11:41 AM	101945	0081610619	HOLLEY JANECZEK	9SDST	00078896	Standard Billing Statement		☑	
03/14/2011 11:41 AM	101945	0090673923	SCOTTY PETTERSEN	9SDST	00078896	Standard Billing Statement		☑	
03/14/2011 11:41 AM	101945	0097120642	MCKINLEY ALBERDING	9SDST	00078896	Standard Billing Statement		☑	
03/14/2011 11:41 AM	101945	0144115169	ROSINA MUSTARO	9SDST	00078896	Standard Billing Statement		☑	
03/14/2011 11:41 AM	101945	0177776410	LUCAS BRIENEN	9SDST	00078896	Standard Billing Statement		☑	
03/14/2011 11:41 AM	101945	0189960678	LADONNA MCCOGGLE	9SDST	00078896	Standard Billing Statement		☑	

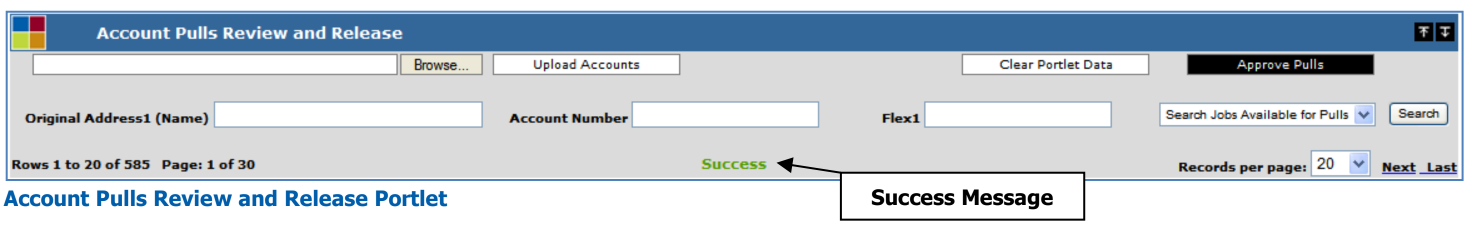
Account Pulls Review and Release Portlet

7. The **Account Pulls Review and Release** Portlet will populate with all accounts flagged for Pulls.
8. To un-flag specific accounts, click the checkbox that corresponds with the **Job ID** under the **Select Pull** Data Header.
9. Click the **Approve Pulls** button.



Received Date	Job ID	Product	Description	Total Quantity	Available For Pull Quantity	Waiting Approval Quantity	Approved Quantity	Scheduled Drop Date	Add Note
03/15/2011 08:10 AM	101954	9SDST	Standard Billing Statement	4692	4692	0	0	03/18/2011	
03/15/2011 08:17 AM	101953	9SDST	Standard Billing Statement	4692	4691	0	1	03/18/2011	
03/15/2011 08:18 AM	101952	9SDST	Standard Billing Statement	4692	4692	0	0	03/18/2011	
03/15/2011 08:19 AM	101951	9SDST	Standard Billing Statement	4692	4692	0	0	03/18/2011	
03/14/2011 11:40 AM	101946	9SDST	Standard Billing Statement	14160	14160	0	0	03/17/2011	
03/14/2011 11:41 AM	101945	9SDST	Standard Billing Statement	585	0	0	585	03/17/2011	

Jobs Available for Pulls Portlet



Account Pulls Review and Release Portlet

The **Approved Quantity** in the **Jobs Available for Pulls (Waiting Review and Release)** Portlet will automatically update to reflect the approved Pulls.

The data in the **Account Pulls Review and Release** Portlet will clear and a Success message will be displayed.

Account Pulls History (Jobs Completed Portlet) Job Id Go

Received Date	Job ID	Product	Description	Quantity Processed	Quantity Pulled	Pulls Approved By	Date Pulls Approved (CST)
03/14/2011 11:41 AM	101945	9SDST	Standard Billing Statement	0	585	SALESDEMO	03/15/2011 02:38 PM
03/15/2011 08:17 AM	101953	9SDST	Standard Billing Statement	4691	1	SALESDEMO	03/15/2011 11:20 AM
03/11/2011 11:25 AM	101922	9SDST	Standard Billing Statement	7883	4	SALESDEMO	03/14/2011 04:21 PM
03/11/2011 11:32 AM	101925	9SDST	Standard Billing Statement	15264	5	SALESDEMO	03/14/2011 04:16 PM
03/11/2011 11:27 AM	101924	9SDST	Standard Billing Statement	991	7	SALESDEMO	03/14/2011 02:21 PM
03/04/2011 09:42 AM	101858	9SDST	Standard Billing Statement	1453	5	SALESDEMO	03/14/2011 02:18 PM
03/11/2011 11:27 AM	101924	9SDST	Standard Billing Statement	998	3	SALESDEMO	03/14/2011 02:17 PM
03/11/2011 11:32 AM	101925	9SDST	Standard Billing Statement	15269	3	SALESDEMO	03/14/2011 10:09 AM
03/04/2011 09:43 AM	101857	9SDST	Standard Billing Statement	1454	4	NCPMASTER	03/08/2011 11:14 AM

Account Pulls History Portlet

The **Account Pulls History (Jobs Completed)** Portlet now displays the approved Pulls.

Once all Pulls have been selected and approved for an account, a Job must be released through the **Review and Release Service**.

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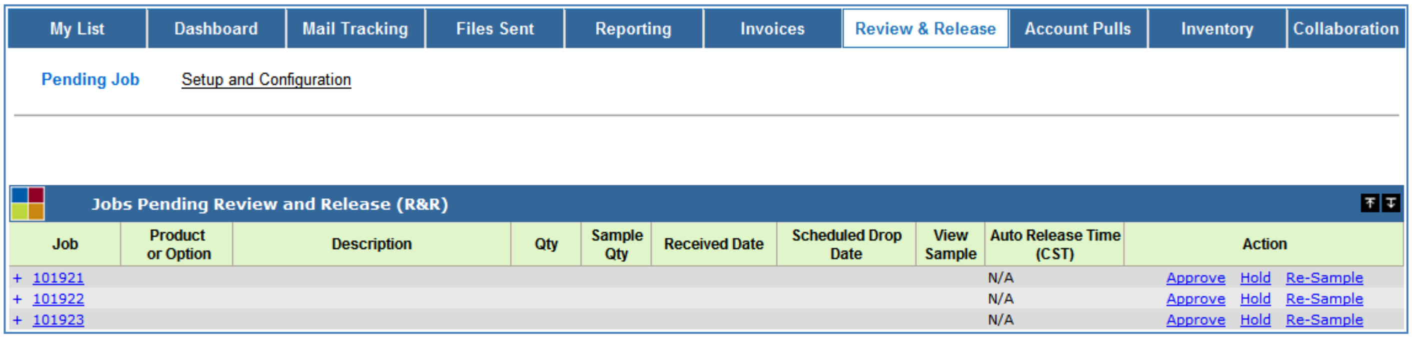
Releasing a Job with Pulled Accounts

After Pulls have been approved, the Job must be released through the Review and Release Service before it will be processed.

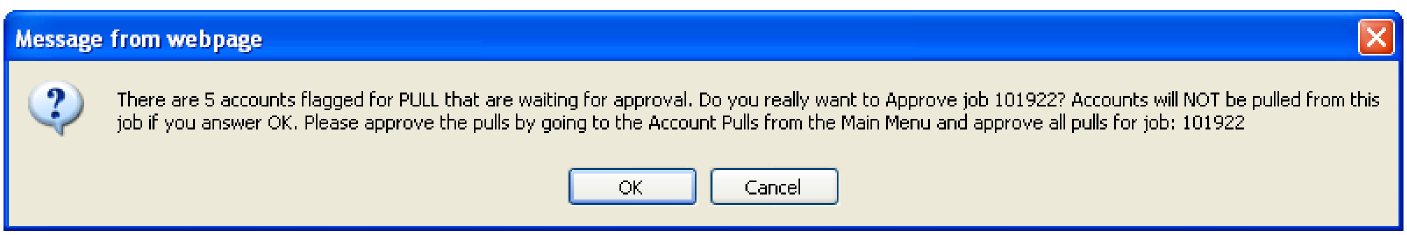
1. Select the **Review and Release** Service on the Main Services Toolbar.



Jobs Pending Review and Release Portlet

2. Click the Approve hyperlink that corresponds with the **Job** to be released in the **Jobs Pending Review and Release** Portlet.

If there are unapproved Pulls flagged for the account associated with a **Job**, the following message will display:



User must approve Account Pulls by utilizing the **Account Pulls** Service.

1. Click Cancel.
2. Select Account Pulls from the Main Services Toolbar.
3. Approve Account Pulls.

If Pulls are not approved through the **Account Pulls** Service, they will be un-flagged and will move through the production process. The **Job** will now be approved.

Once Pulls have been approved, the history can be viewed in the **Account Pulls History (Jobs Completed)** Portlet in the **Account Pulls** Service.

Add Note Feature (Included in Account Pulls Service and Inventory Service)

The **Add Note** feature is included in the **Account Pulls** Service as well as the **Inventory** Service.

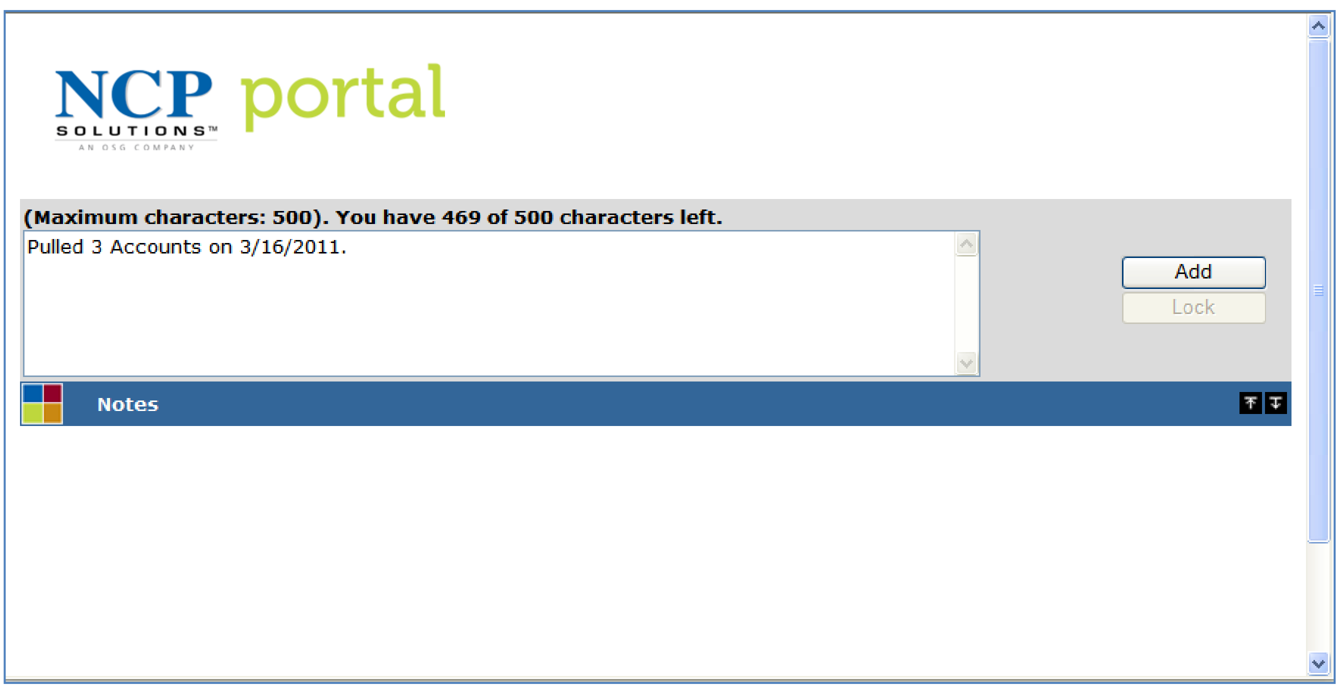
The **Jobs Available for Pulls** Portlet and the **Account Pulls Review and Release** Portlet include an **Add Note** Feature. If the **Add Note** Feature has been activated, Users can add notes pertaining to Account Pulls. To have the **Add Note** Feature activated, please contact your Company Administrator.

Jobs Available for Pulls (Waiting Review and Release) — Account Number [ ] Go

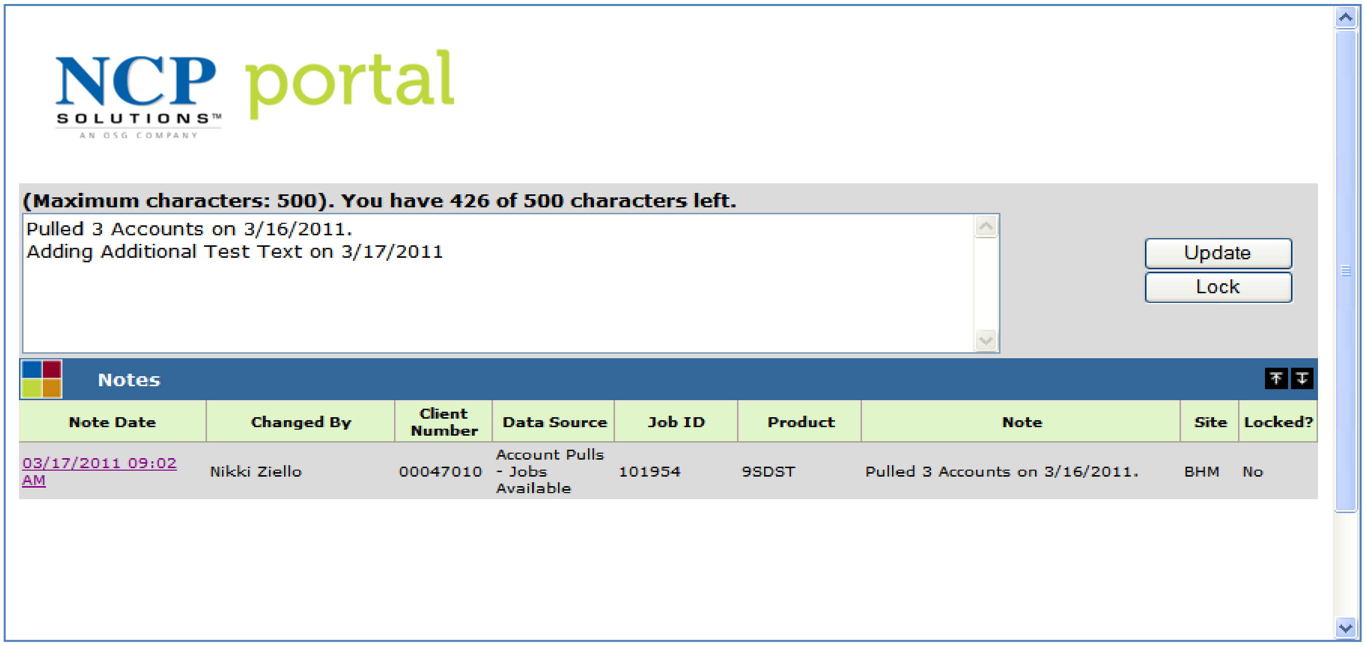
Received Date	Job ID	Product	Description	Total Quantity	Available For Pull Quantity	Waiting Approval Quantity	Approved Quantity	Scheduled Drop Date	Add Note
03/15/2011 08:10 AM	101954	9SDST	Standard Billing Statement	4692	4689	0	3	03/18/2011	
03/15/2011 08:18 AM	101952	9SDST	Standard Billing Statement	4692	4692	0	0	03/18/2011	
03/15/2011 08:19 AM	101951	9SDST	Standard Billing Statement	4692	4692	0	0	03/18/2011	
03/14/2011 11:40 AM	101946	9SDST	Standard Billing Statement	14160	14160	0	0	03/17/2011	
03/14/2011 11:41 AM	101945	9SDST	Standard Billing Statement	585	0	0	585	03/17/2011	

Jobs Available for Pulls (Waiting Review and Release) Portlet

1. Click the **Add Note** icon .
2. The **Notes Dialogue** box will display.
3. Enter text in the Note box - The maximum amount of characters allowed in the Notes box is 500. Special characters in the Notes box are limited to periods and hash (#) signs. Special characters such as parentheses, exclamation points, dollar signs, etc., will be filtered and will not be included in the note. This feature is necessary to prevent SQL injection security attacks.
4. Click Add.



Add Note Dialog Box



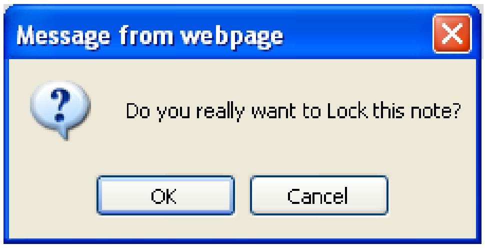
Add Note Dialog Box

The **Notes** Portlet within the Notes Dialog box delivers important information about all Notes added to a record. The information displayed contains the following Data Headers:

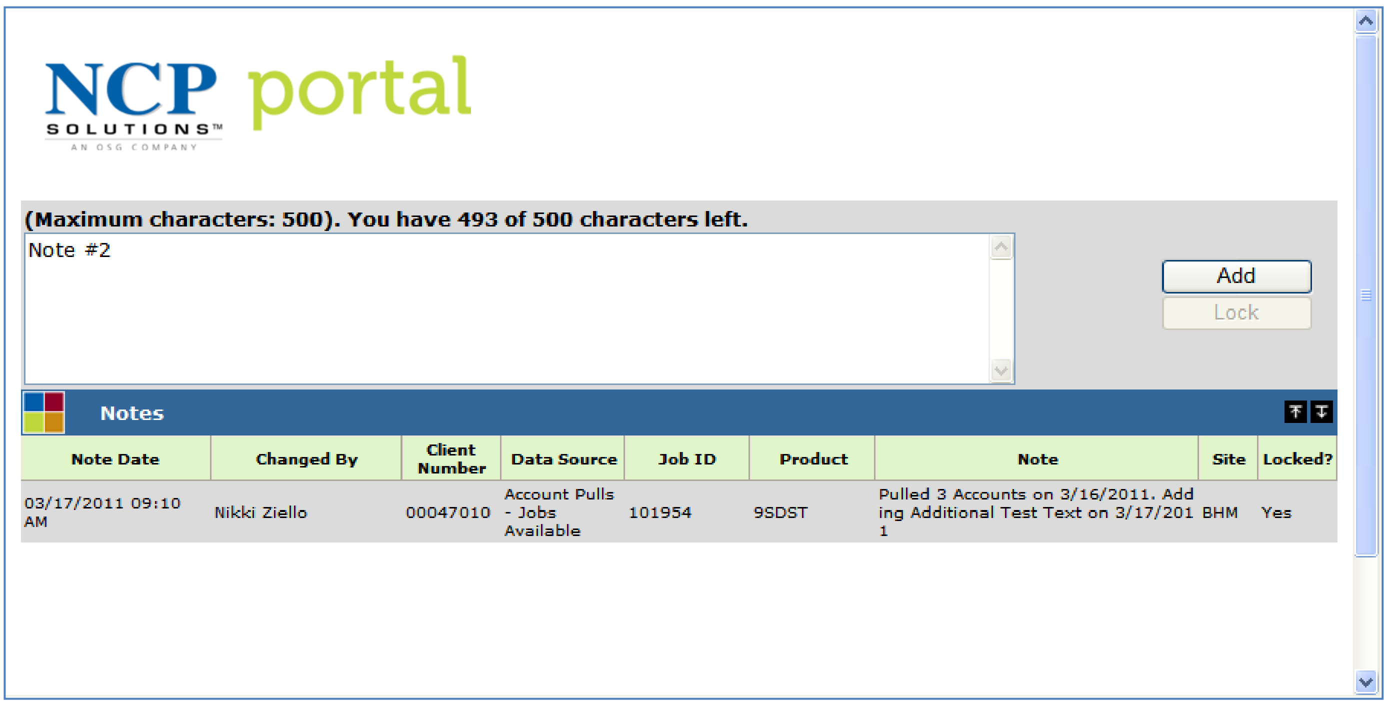
- **Note Date** – Date Note was added/edited
- **Changed By** – User
- **Client Number**
- **Data Source**
- **Job ID** – A number assigned to a data file or group of files that is used to track work in progress
- **Product –** Product Number
- **Note –** View of Note
- **Site –** NCP location where the data was sent
- **Locked?**

Once a note has been added, details will display in the **Notes** Portlet within the **Add Note** Dialog Box. Users can access and edit Notes by clicking on the hyperlink under the **Note Date** Data Header.
Notes are edited by entering additional text to the Note box and clicking the Update button.
The note can be locked at this time. The **Lock?** Feature prevents Users from editing notes made by other Users.

1. To lock the note, click the Lock button. The following message will display.



2. Click OK



Add Note Dialog Box

The note is now locked. The Note Date is no longer hyperlinked and this note may not be edited further. The status under the **Locked?** Data Header has now changed from No to Yes.

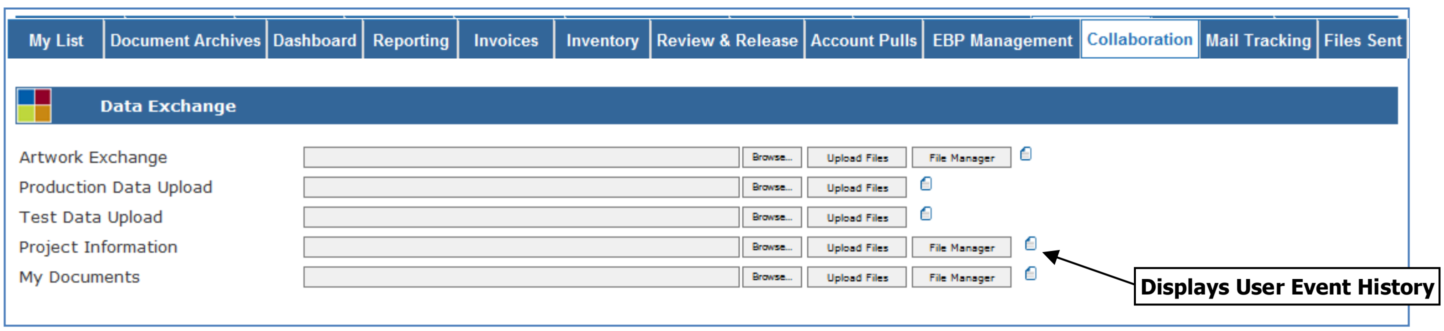
Users may add additional notes to the record by typing text in the note box and clicking the Add button.

Collaboration

Overview

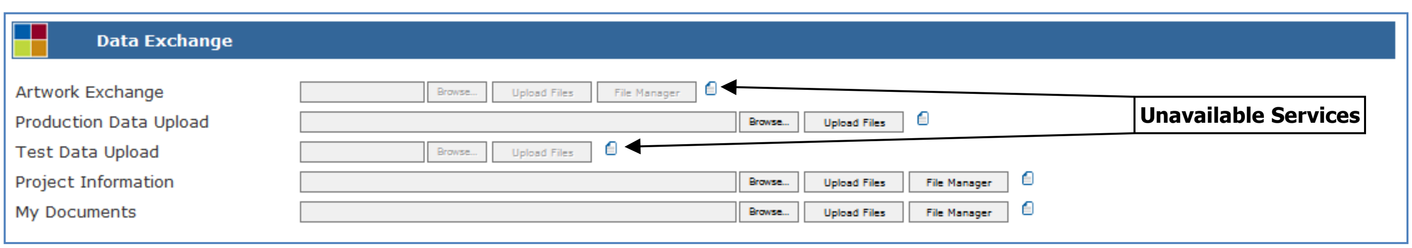
Collaboration provides a means for Clients to easily exchange information and data files with NCP in a secure and efficient manner. **Collaboration** is comprised of the following Portlets:

- **Data Exchange**
  - Provides the ability to upload and/or download artwork, images, and graphics
  - Provides the ability to upload and/or download project information
  - Provides the ability to upload production or test data files
  - Provides the ability to upload and store documents, spreadsheets and presentations
- **File Manager**
  - Service that allows for the browsing and selection of files stored within Portal
- **User Event History**
  - Provides an audit history of User events by each **Collaboration** Service



Collaboration Portlet

*** Services that have not been granted will be "grayed" out and are not available for use.



Data Exchange showing disabled services

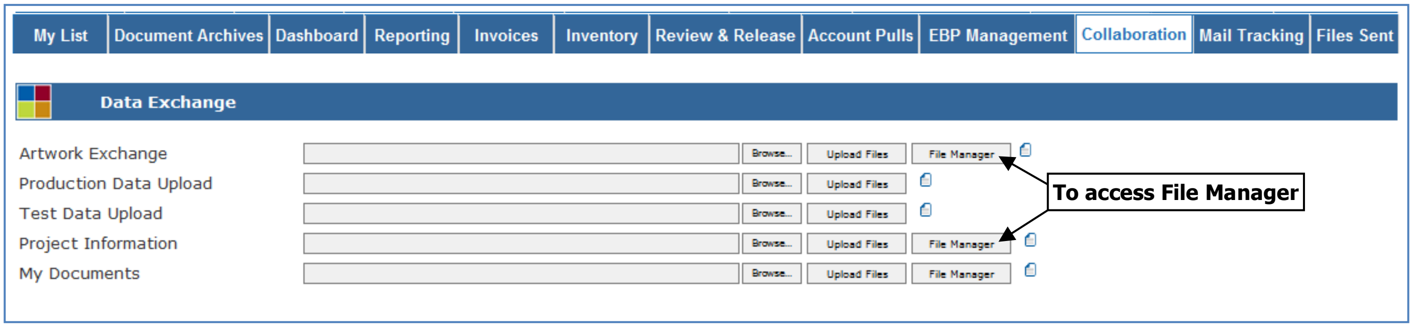
Data Exchange

The **Data Exchange** Portlet is the mechanism used to transfer information to and from NCP and is comprised of four **User Event** Services, each designed to efficiently process and store specific types of information. **Data Exchange** is comprised of the following services:

- Artwork Exchange
- Production Data Upload
- Test Data Upload
- Project Information
- My Documents

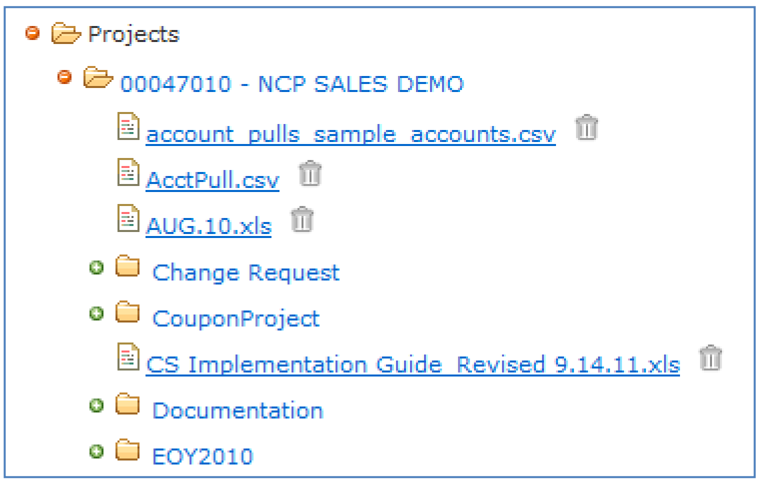
File Manager

The **File Manager** Portlet provides the User with a structured tree view of their stored data files within the NCP network. The **File Manager** Portlet is displayed by selecting one of the Upload or Download buttons.



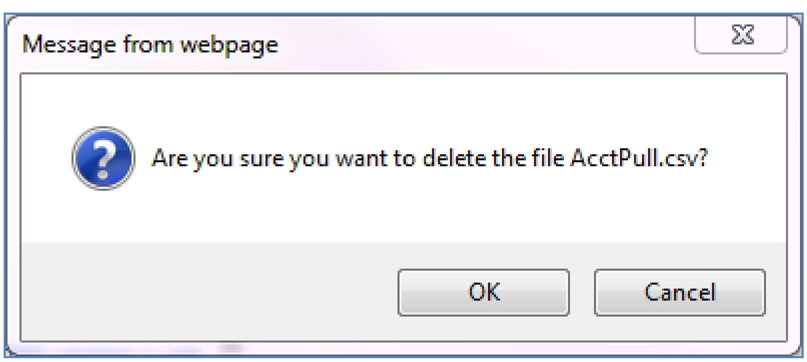
File Manager Portlet

To drill down to the sub-directories located below the Portlet click the + to the left of each directory name.

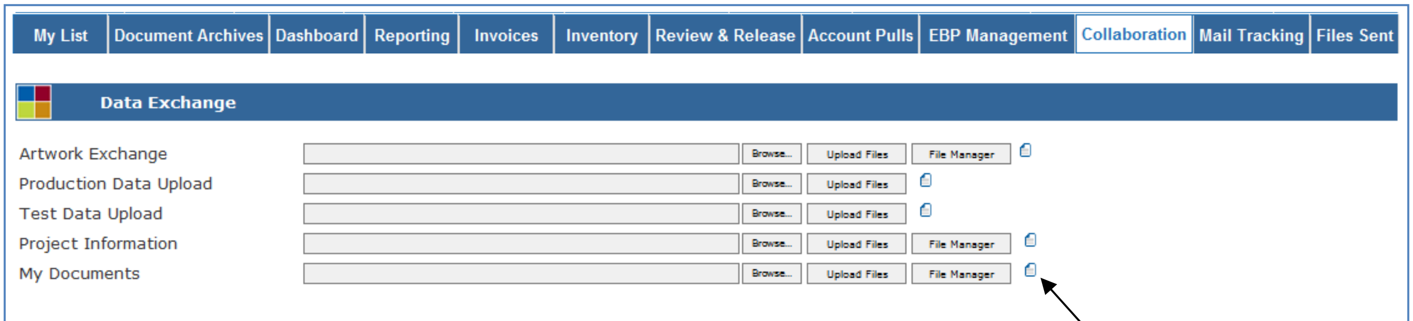


File Manager Expanded (Birmingham Clients)

Clicking the trash can icon provides Users with the ability to delete a file from the File Manager. When selected, Users will receive the following message for the file selected:

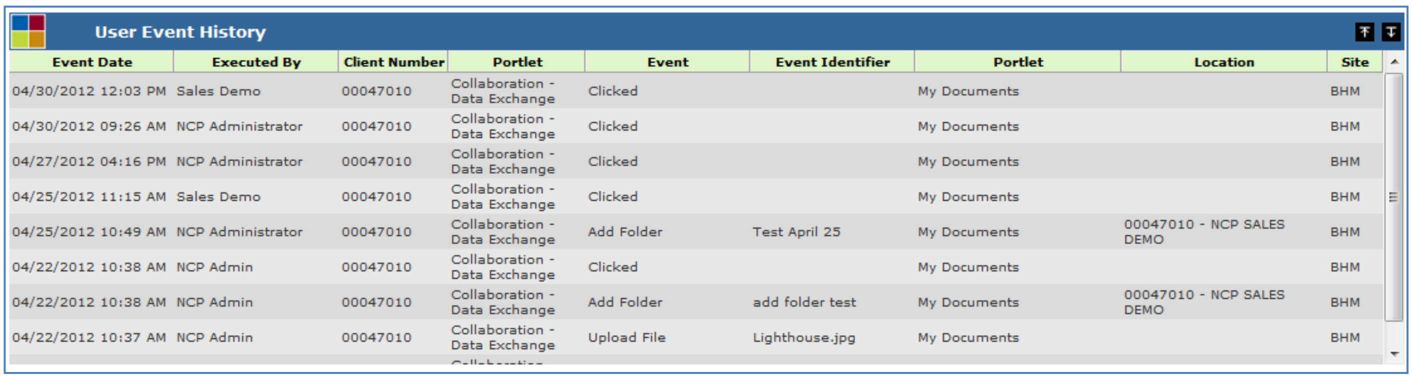


User Event History



Data Exchange Portlet

To view the **User Event History** log associated with each **Data Exchange** within the Portlet, click on the associated **Event history Icon** .



Event Date	Executed By	Client Number	Portlet	Event	Event Identifier	Portlet	Location	Site
04/30/2012 12:03 PM	Sales Demo	00047010	Collaboration - Data Exchange	Clicked		My Documents		BHM
04/30/2012 09:26 AM	NCP Administrator	00047010	Collaboration - Data Exchange	Clicked		My Documents		BHM
04/27/2012 04:16 PM	NCP Administrator	00047010	Collaboration - Data Exchange	Clicked		My Documents		BHM
04/25/2012 11:15 AM	Sales Demo	00047010	Collaboration - Data Exchange	Clicked		My Documents		BHM
04/25/2012 10:49 AM	NCP Administrator	00047010	Collaboration - Data Exchange	Add Folder	Test April 25	My Documents	00047010 - NCP SALES DEMO	BHM
04/22/2012 10:38 AM	NCP Admin	00047010	Collaboration - Data Exchange	Clicked		My Documents		BHM
04/22/2012 10:38 AM	NCP Admin	00047010	Collaboration - Data Exchange	Add Folder	add folder test	My Documents	00047010 - NCP SALES DEMO	BHM
04/22/2012 10:37 AM	NCP Admin	00047010	Collaboration - Data Exchange	Upload File	Lighthouse.jpg	My Documents		BHM

User Event History - Artwork Exchange

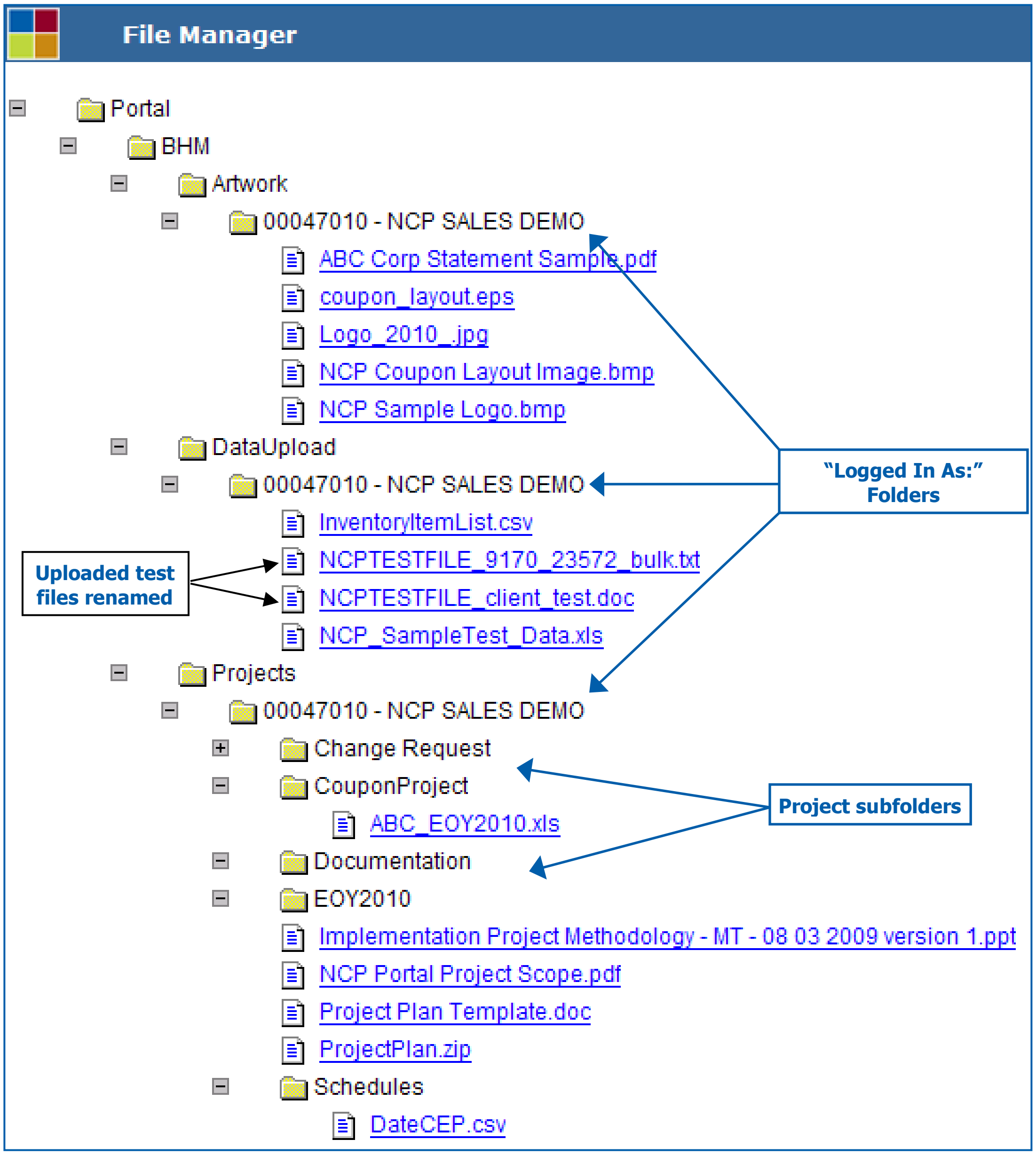
Data Locations and Business Rules

Collaboration has been designed and organized to facilitate the sharing of information between NCP and our Clients. Based upon the service selected, the associated business rules will vary as well as the location that the data files are stored. The specific details and rules for each service are outlined below.

- All Services
  - A "Logged In As:" folder is automatically created the first time that a User attempts to upload a file to Portal. The folder name is equal to the "Logged In As:" Client ID – Client Name displayed in Portal's header area.

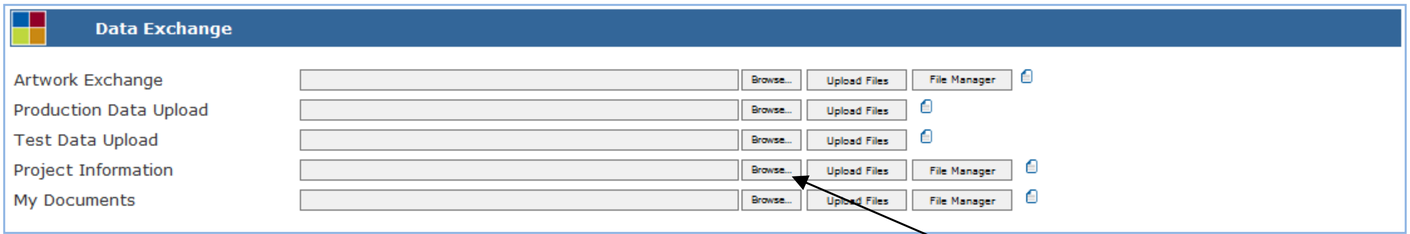
- **Artwork Exchange**
  - Artwork, graphics, and images are stored in the "Logged In As:" subfolder within the "Artwork" directory.
- **Production Data Upload**
  - Production data files are stored in the "Logged In As:" subfolder within the "Data Upload" directory.
- **Test Data Upload**
  - Test data files are stored in the "Logged In As:" subfolder within the "Data Upload" directory.
  - To identify test files, the text string "NCPTESTFILE_" is pre-pended to the beginning of any test data file that is uploaded. Example: If the Client is uploading a file named "Client_test.doc," then Portal will save the file as "NCPTESTFILE_ Client_test.doc."
  - Uploaded files beginning with "NCPTESTFILE_" are routed by the NCP internal workflow engine to the test environment for processing, thereby eliminating the possibility that a test file is submitted in error for actual production.
- **Project Information**
  - The NCP Project Manager is responsible for the management of all NCP Client projects.
  - Project-related files are stored in the "Logged In As:" folder within the "Projects" directory.
  - To assist in the organizing of project information, the NCP Project Manager may create additional subfolders underneath the "Logged In As:" folder. Users then have the ability to transfer data files to/from these folders.

Business rules and file locations are shown in the image below.



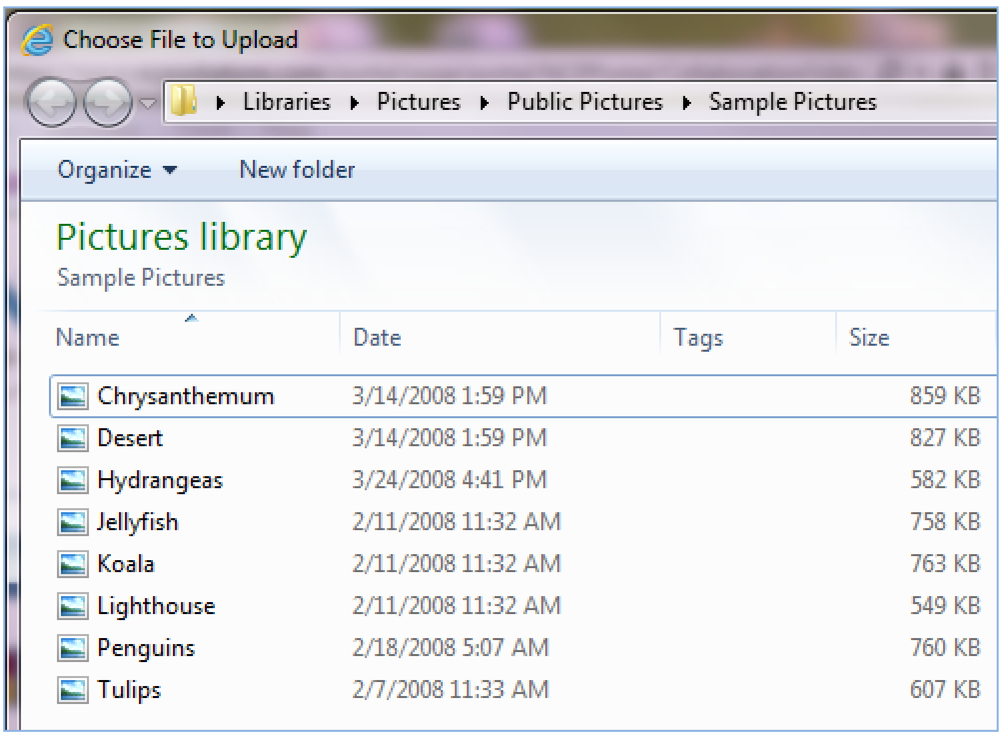
File Locations

To Upload a File (to NCP)

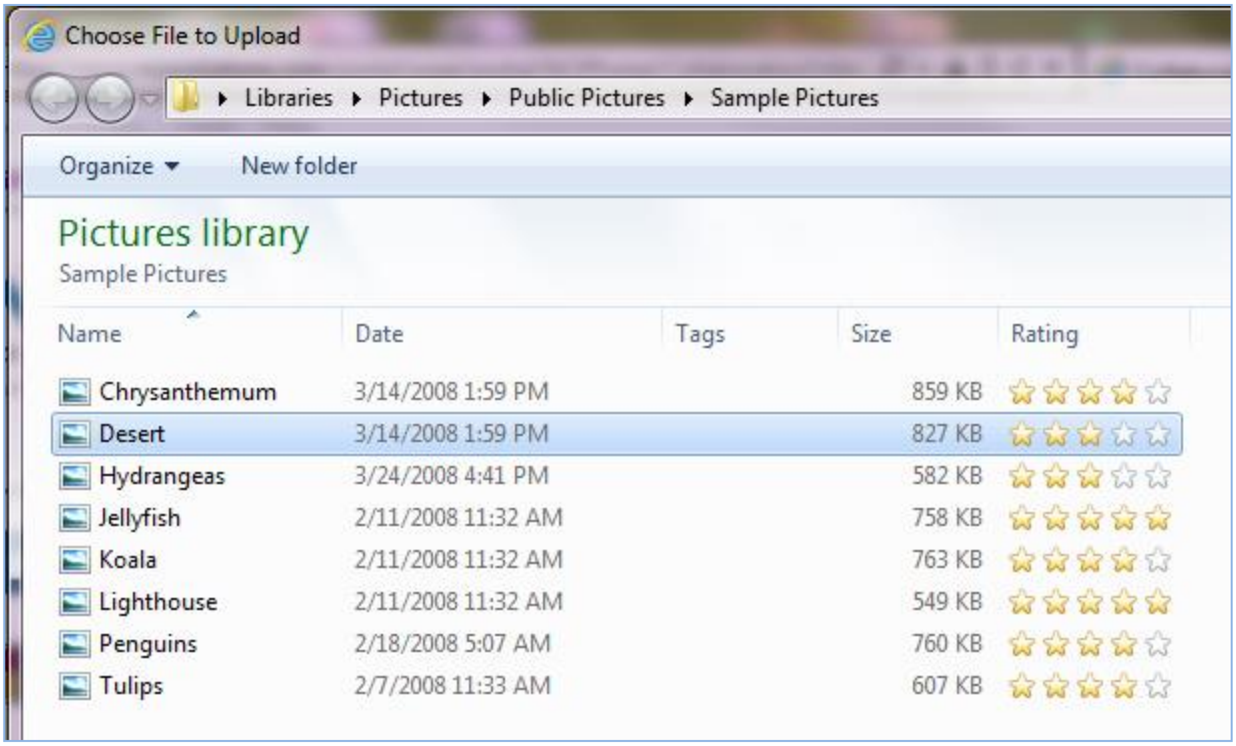


Data Exchange Portlet

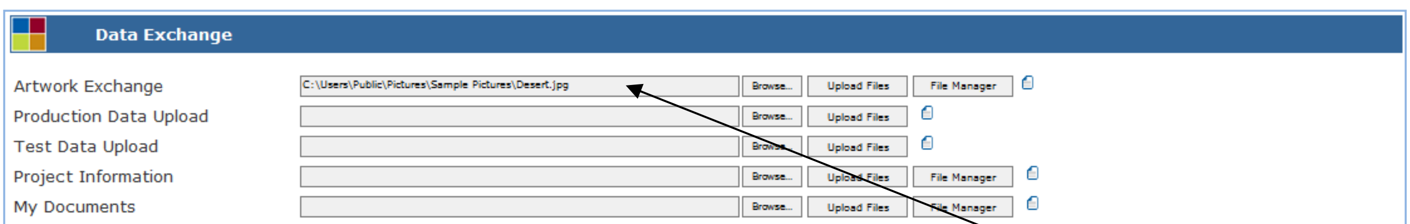
1. Determine the type of data file to be uploaded and click the associated Browse button.
2. The following window will appear:



3. On your local machine, browse to the directory that contains the file to be uploaded.

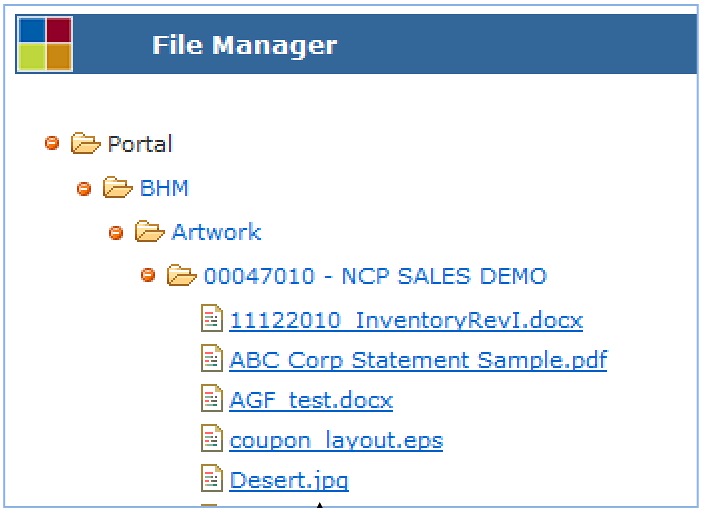


4. Select the file to upload and click Open.



Artwork File Selected to Upload

5. The location path of the file selected from your local computer will appear in the *File Location* box to the left of the Browse button.
6. Click Upload. The **File Manager** Portlet will initiate, and Portal will transfer the file to the appropriate directory.
7. To verify that the file was successfully uploaded, expand the **File Manager** directory to the appropriate directory based upon the type of file uploaded.

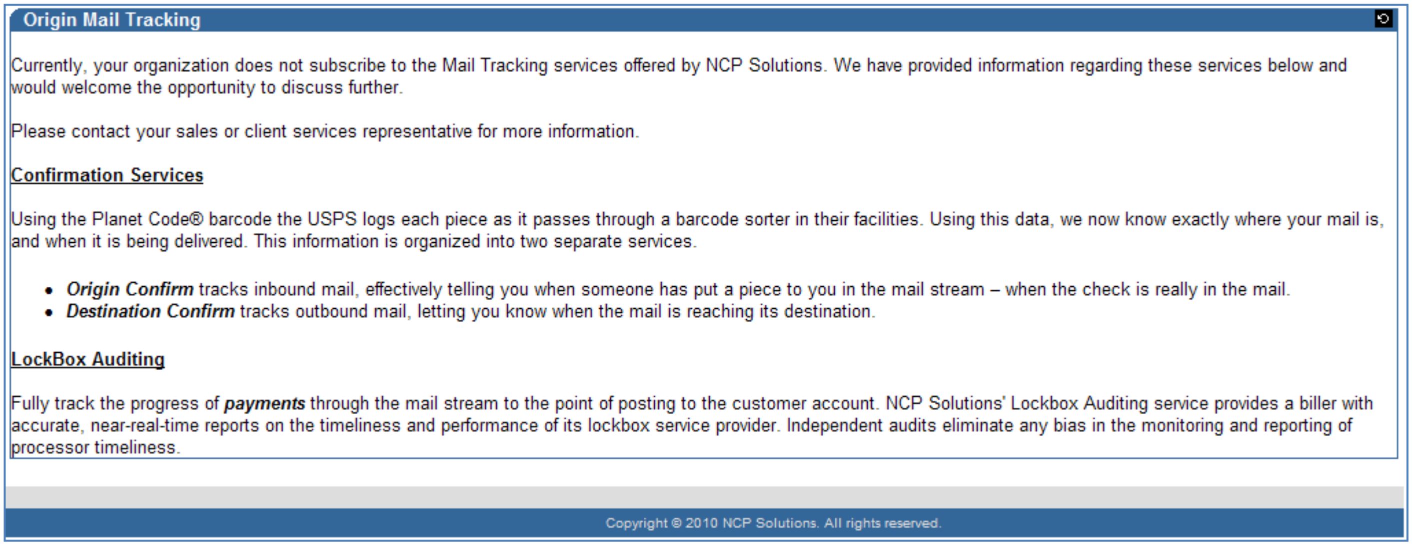


8. The uploaded data file should now be listed within the appropriate sub-folder.

Mail Tracking

Working in partnership with the United States Postal Service (USPS), NCP produces documents that incorporate postal barcodes that allow the USPS to track outgoing documents and incoming payments. The **Mail Tracking** Service is a fee-based service and must be established through Client Services.

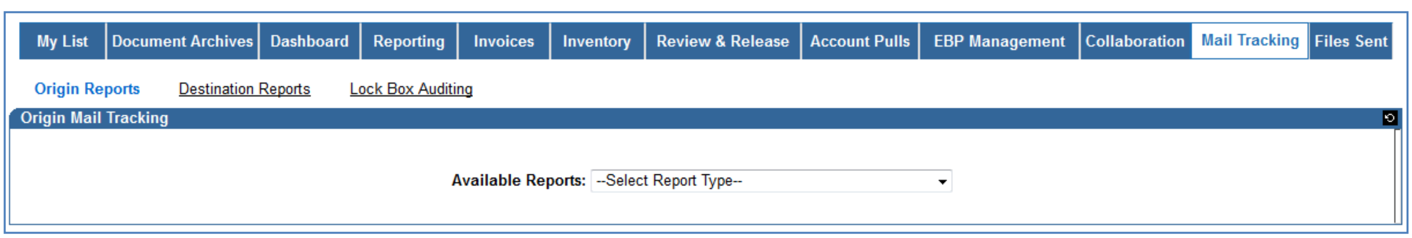
The following screen will appear if your organization has not subscribed to the **Mail Tracking** Service.



Not Subscribed to Mail Tracking Service

Mail Tracking contains three specific sub services:

- Origin Confirmation
- Destination Confirmation
- Lockbox Auditing

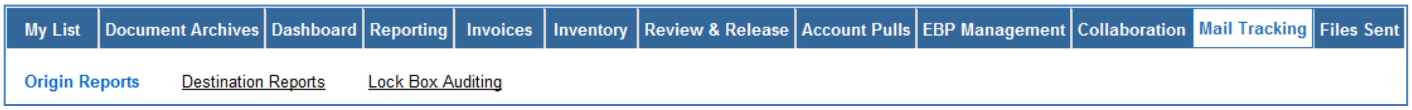


Mail Tracking Main Screen

Origin Reports

The **Origin Reports** (for incoming mail) enable you to anticipate when Client checks, replies, or orders are on the way back to you. Reports generated and delivered through the **Mail Tracking** Service include:

- Report by USPS Process Date
- Single Account Lookup by Due Date
- Monthly Summary Due Date



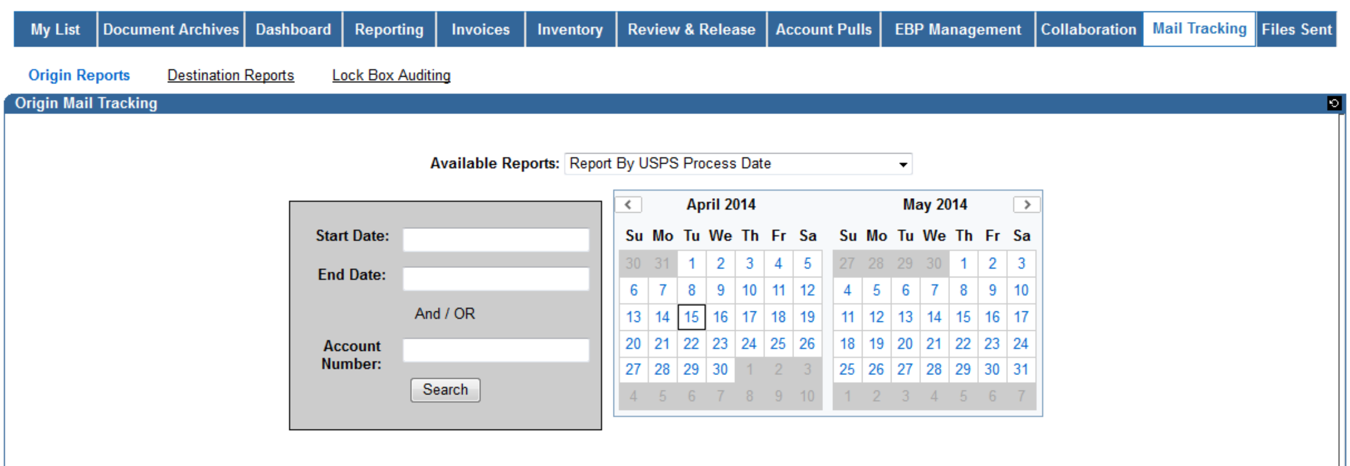
Main Services Toolbar (Mail Tracking Selected indicating links)

To access Origin Reports:

- Select the Mail Tracking Service from the Main Services Toolbar
- Click the Origin Reports link

Report by USPS Process Date

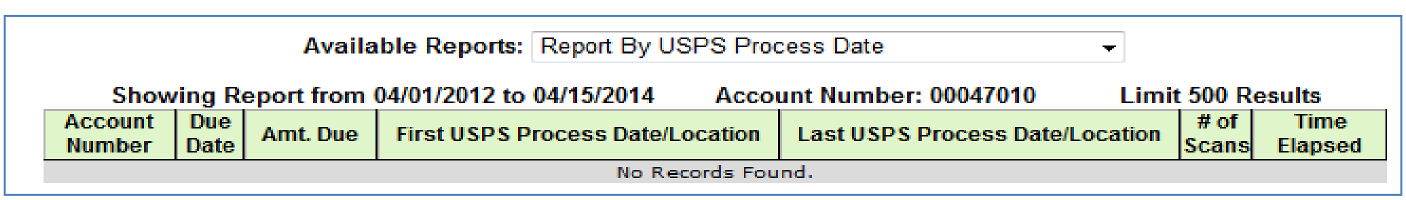
The Report by USPS Process Date allows the User to search by either a date range, Account #, or both.



Report by USPS Process Date Selection Screen

To generate the Report by USPS Process Date:

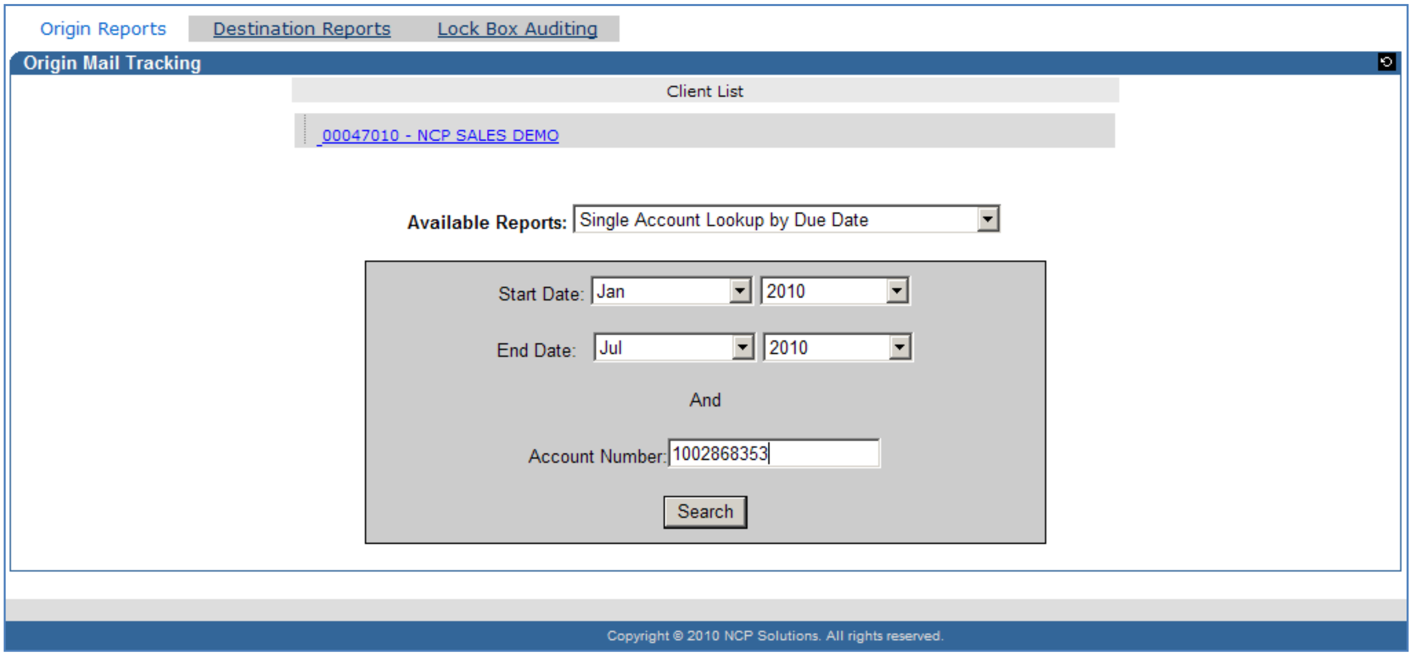
- Select a company from the Client List tree
- Enter a *Start Date* and *End Date*
- Enter an *Account #* to search for a single Account or leave blank to view all Accounts
- Click Search



Report by USPS Process Date

Single Account Lookup by Due Date

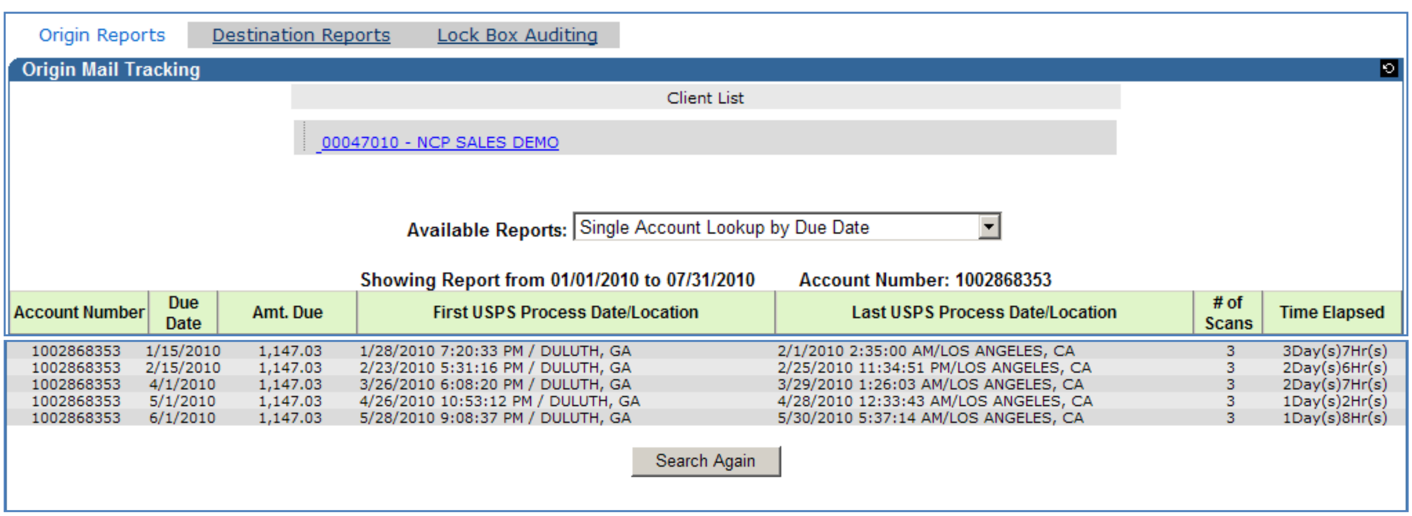
The Single Account Lookup by Due Date report allows you to search by date range on a specific account.



Single Account Lookup by Due Date Selection Screen

To generate the Single Account Lookup by Due Date report:

1. Select a company from the Client List tree
2. Enter a *Start Date* and *End Date*
3. Enter an *Account #* to search for a single Account
4. Click Search

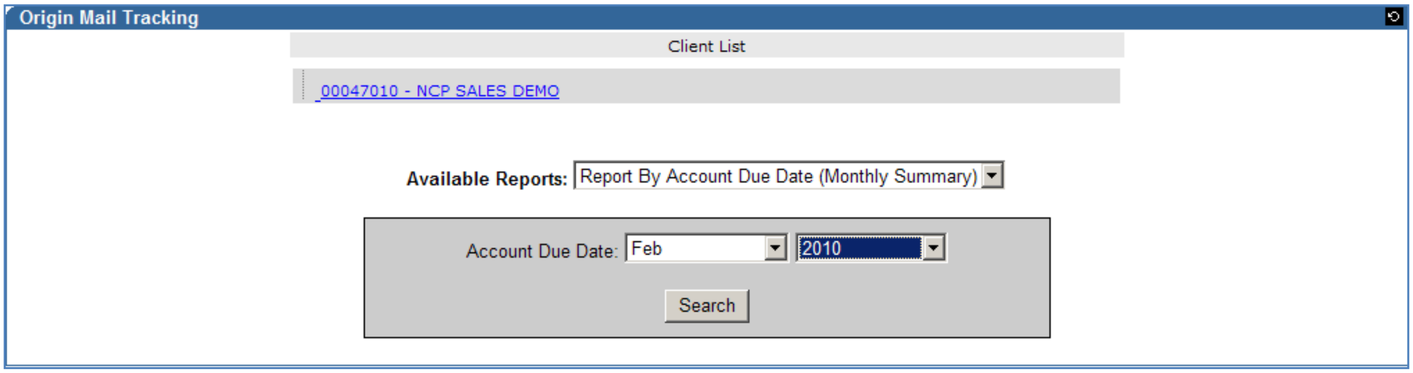


Account Number	Due Date	Amt. Due	First USPS Process Date/Location	Last USPS Process Date/Location	# of Scans	Time Elapsed
1002868353	1/15/2010	1,147.03	1/28/2010 7:20:33 PM / DULUTH, GA	2/1/2010 2:35:00 AM/LOS ANGELES, CA	3	3Day(s)7Hr(s)
1002868353	2/15/2010	1,147.03	2/23/2010 5:31:16 PM / DULUTH, GA	2/25/2010 11:34:51 PM/LOS ANGELES, CA	3	2Day(s)6Hr(s)
1002868353	4/1/2010	1,147.03	3/26/2010 6:08:20 PM / DULUTH, GA	3/29/2010 1:26:03 AM/LOS ANGELES, CA	3	2Day(s)7Hr(s)
1002868353	5/1/2010	1,147.03	4/26/2010 10:53:12 PM / DULUTH, GA	4/28/2010 12:33:43 AM/LOS ANGELES, CA	3	1Day(s)2Hr(s)
1002868353	6/1/2010	1,147.03	5/28/2010 9:08:37 PM / DULUTH, GA	5/30/2010 5:37:14 AM/LOS ANGELES, CA	3	1Day(s)8Hr(s)

Single Account Lookup by Due Date Report

Monthly Summary Account Due Date

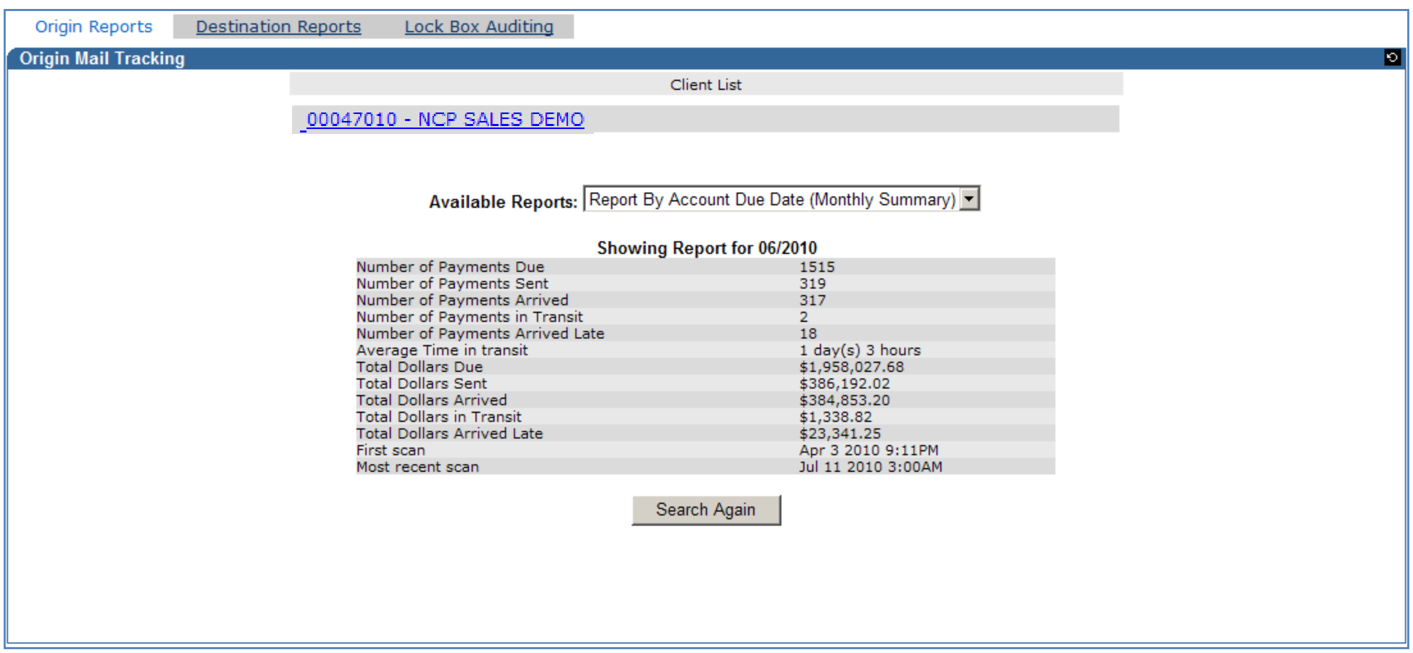
The Account Due Date (Monthly Summary) Report provides a summary of account activity by month.



Report by Account Due Date (Monthly Summary) Selection Screen

To generate the Account Due Date (Monthly Summary) report:

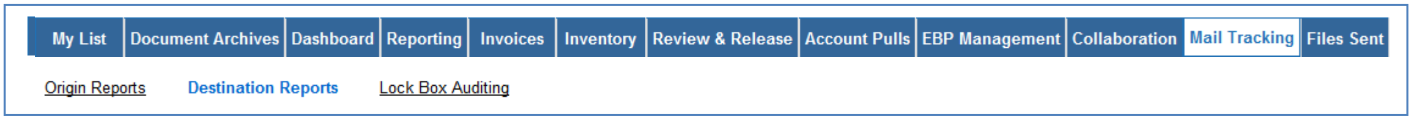
1. Select a company from the Client List tree
2. Enter the *Month* and *Year* to include in the report
3. Click Search



Report by Account Due Date (Monthly Summary)

Destination Reports

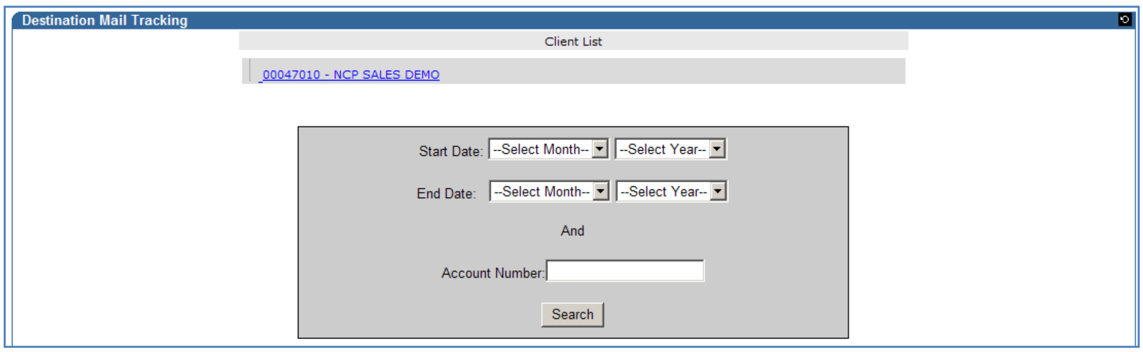
The Destination Report is a confirmation service (for outgoing mail) that provides advance information about when your mail will reach its destination.



Main Services Toolbar (Mail Tracking Selected indicating links)

To access Destination Reports:

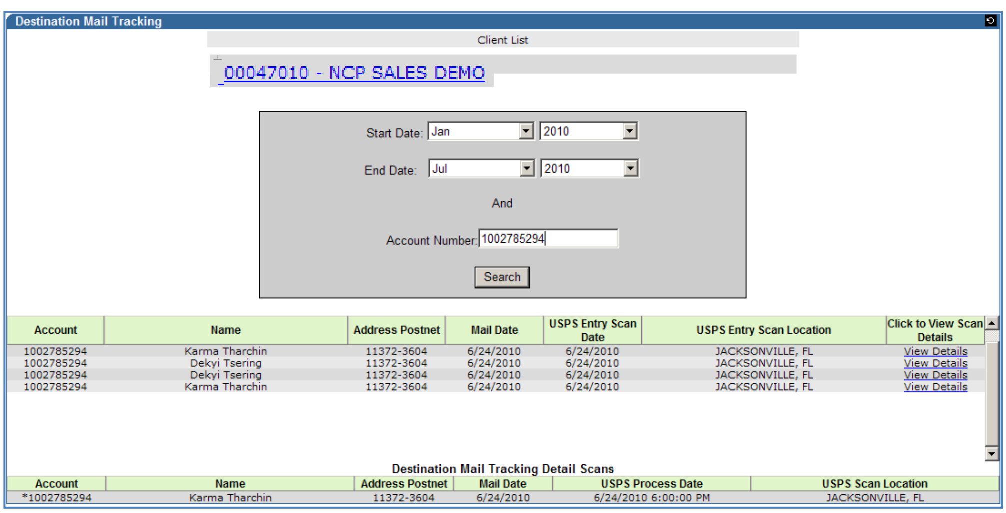
- Select the **Mail Tracking** Service from the Main Services Toolbar
- Click the Destination Reports link



Destination Reporting Selection Screen

To generate the Report by USPS Process Date:

1. Select a company from the Client List tree
2. Enter the *Start Date Month and Year*
3. Enter the *End Date Month and Year*
4. Enter an *Account #* to search for a single Account or leave blank to view all Accounts
5. Click Search

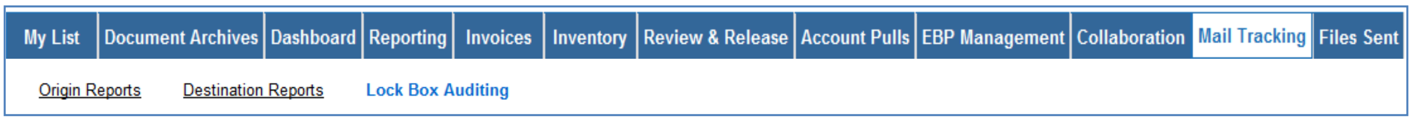


Destination Report

Lockbox Auditing

Lockbox Auditing manages lockbox relationships and fully tracks the progress of payments through the mailstream to the point of posting to the Client account. NCP Solutions **Lockbox Auditing** Service provides a biller with accurate, near-real-time reports on the timeliness and performance of its lockbox service provider. Independent audits eliminate any bias in the monitoring and reporting of processor timeliness. **Lockbox Auditing** reports include:

- Audit Report
- Summary Report
- Summary Report by Month and Year



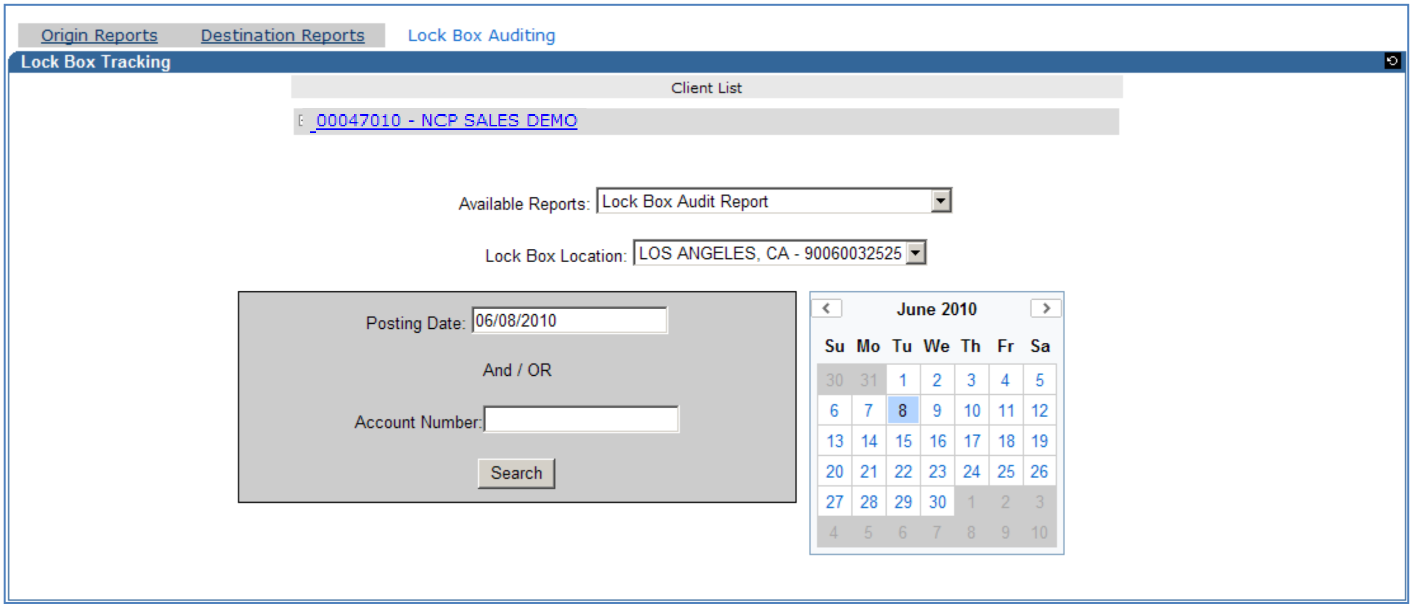
Main Services Toolbar (Mail Tracking Selected indicating links)

To access Lock Box Auditing:

- Select the **Mail Tracking** Service from the Main Services Toolbar
- Click the Lock Box Auditing link

Lockbox Auditing

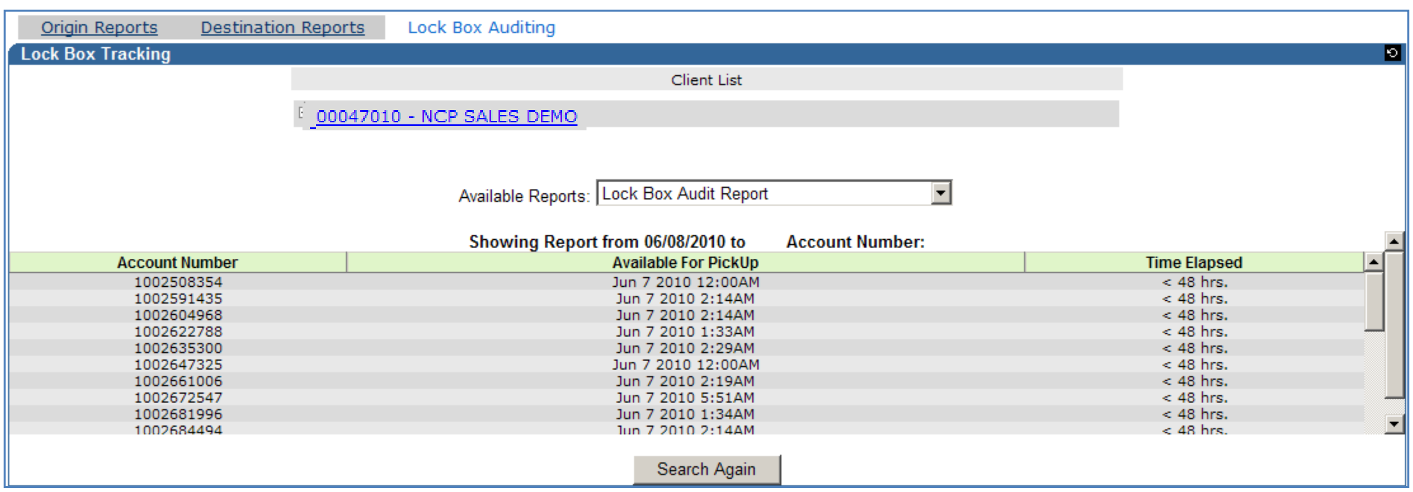
Lockbox Audit Report



Lockbox Audit Report Selection Screen

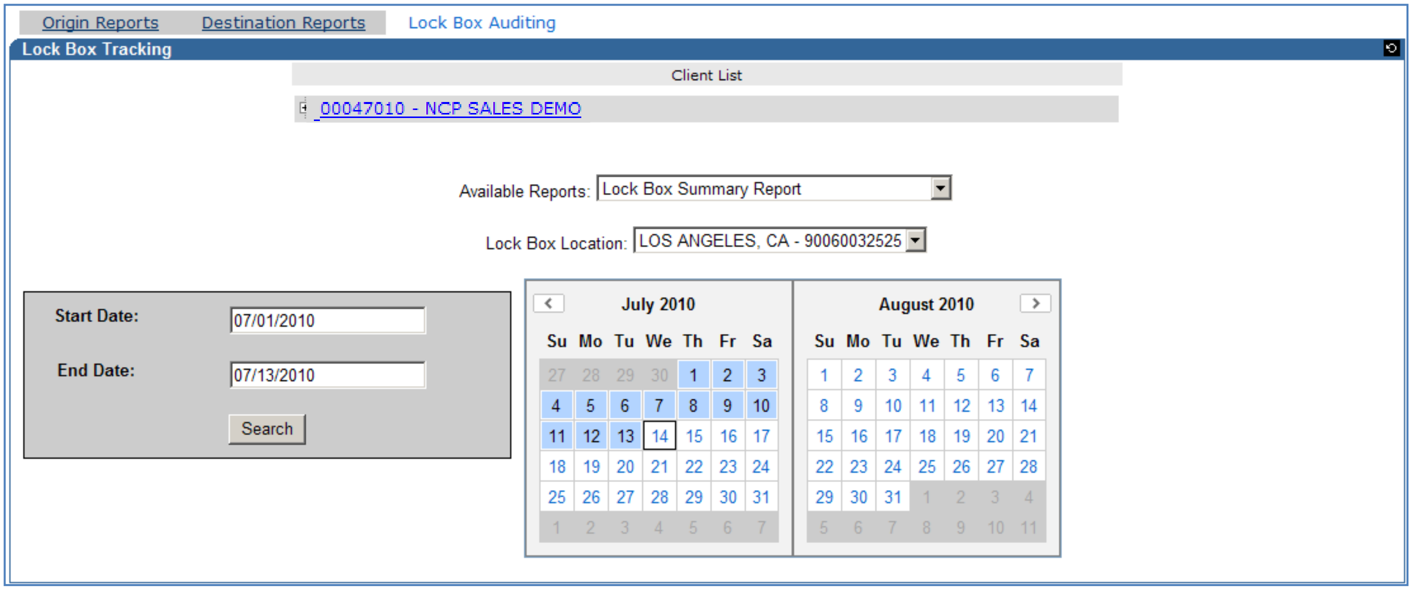
To generate the **Lockbox Audit** Report:

1. Select the Lockbox location from the drop-down list
2. Enter the *Posting Date*
3. Enter an *Account #* to search for a single Account or leave blank to view all Accounts
4. Click Search



Lockbox Audit Report

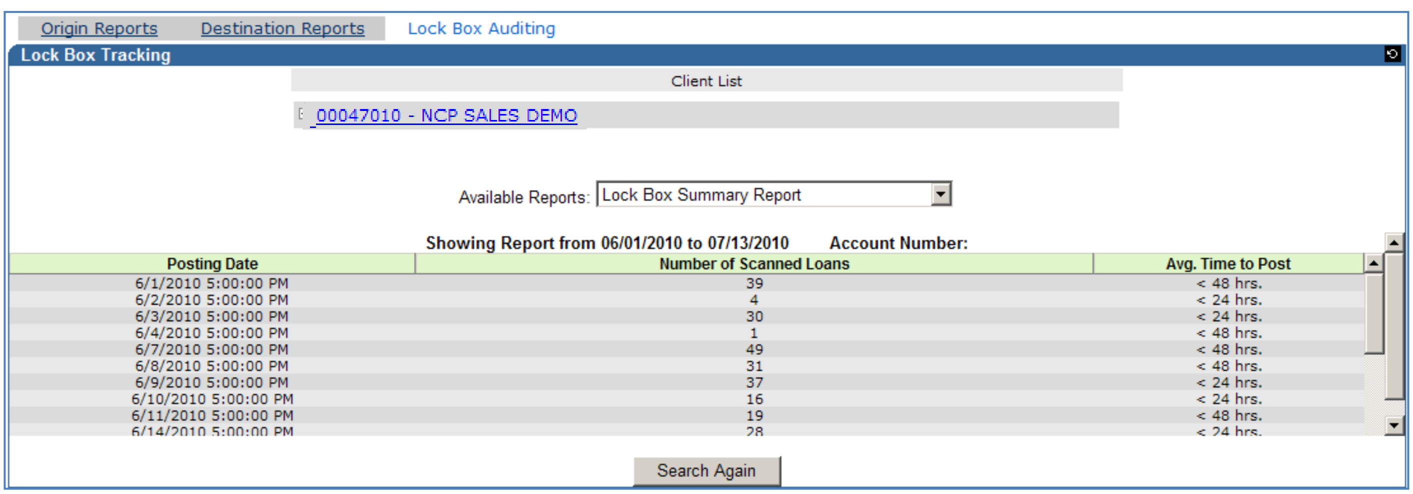
Lockbox Summary Report



Lockbox Summary Report Selection Screen

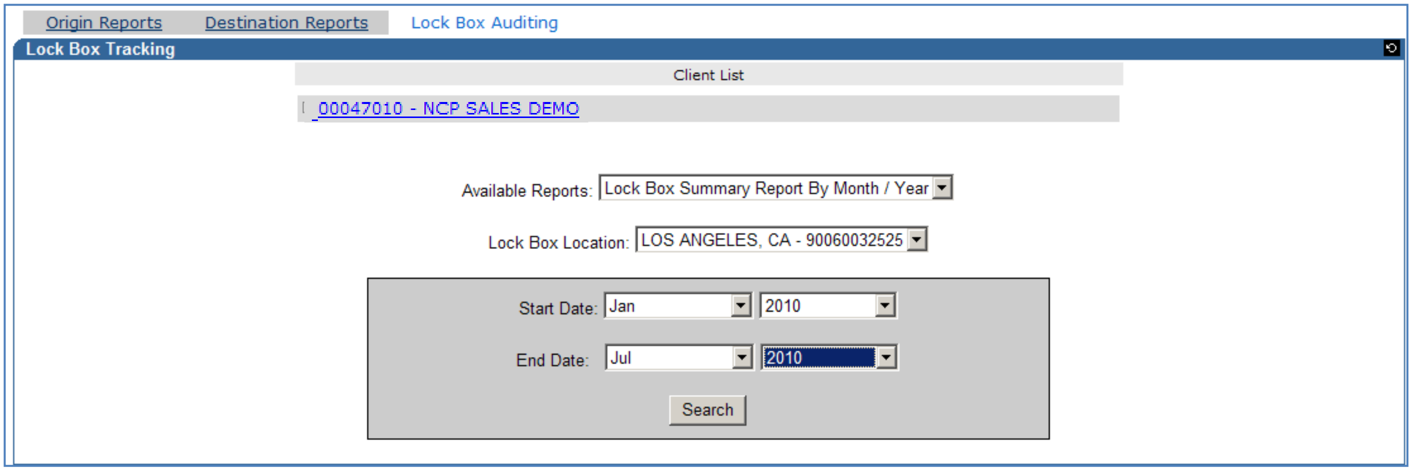
To generate the Lockbox Summary Report:

1. Select the Lockbox location from the drop-down list
2. Enter a *Start and End Date*
3. Click Search



Lockbox Summary Report

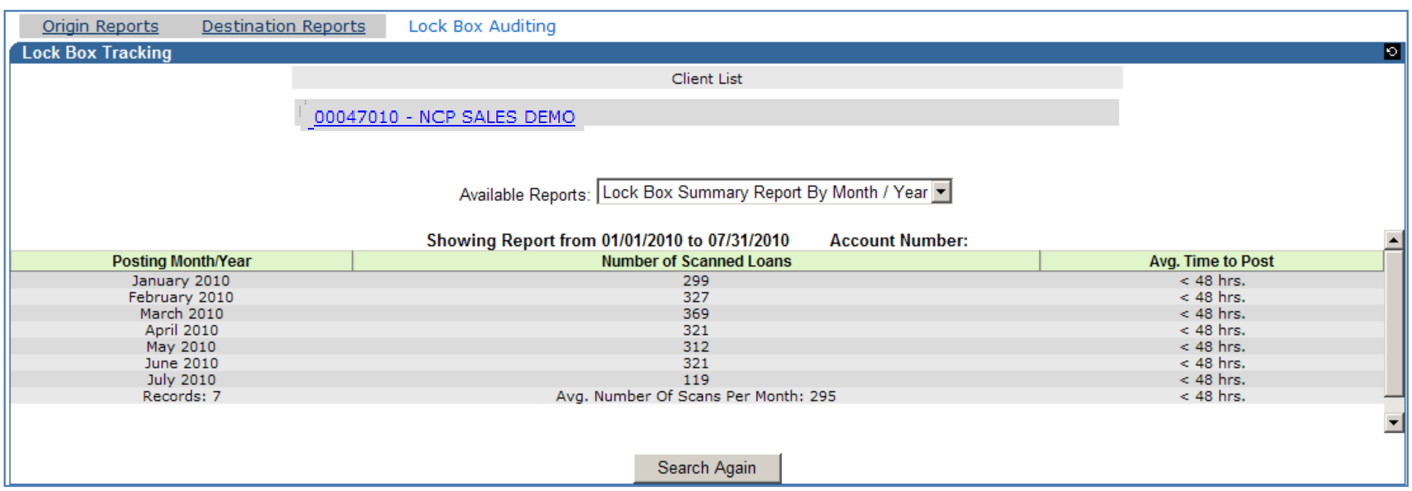
Lockbox Summary Report by Month/Year



Lockbox Summary Report by Month/Year Selection Screen

To generate the Lockbox Summary Report by Month/Year:

1. Select the Lockbox location from the drop-down list
2. Enter the *starting Month and Year*
3. Enter the *ending Month and Year*
4. Click Search



Posting Month/Year	Number of Scanned Loans	Avg. Time to Post
January 2010	299	< 48 hrs.
February 2010	327	< 48 hrs.
March 2010	369	< 48 hrs.
April 2010	321	< 48 hrs.
May 2010	312	< 48 hrs.
June 2010	321	< 48 hrs.
July 2010	119	< 48 hrs.
Records: 7	Avg. Number Of Scans Per Month: 295	< 48 hrs.

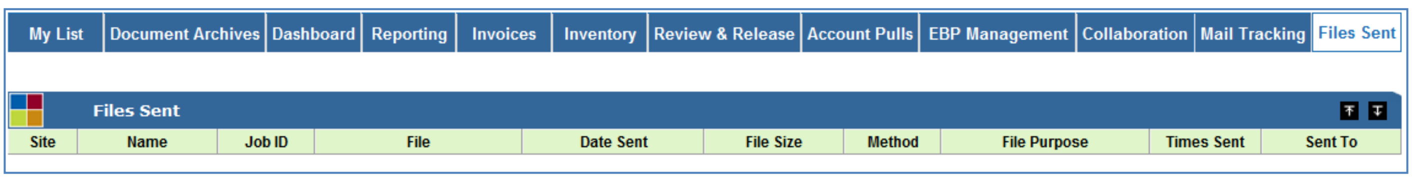
Lockbox Summary Report by Month/Year

Files Sent

The **Files Sent** Service is available to all Clients who receive uploaded data files from NCP. The Name header will contain a hyperlink that will provide the number of records sent, location that the file was transmitted, and other information. The Portlet provides the following information:

- **Site -** NCP location where the data was sent
- **Name -** Client Name
- **Job ID -** A number assigned to a data file or group of files that is used to track work in progress
- **Name -** File Name
- **Date Sent**
- **File Size**
- **Method -** Method of Data Transmission
- **File Purpose**
- **Times Sent**
- **Sent To**

The **File Purpose** field includes a description such as: ACS, Mail Tracking, Shipping Confirmation, FileNet Archive, NCP Archive, SSPDF Archive, and any other files that NCP may send to Clients.



Files Sent Service

System Auditing

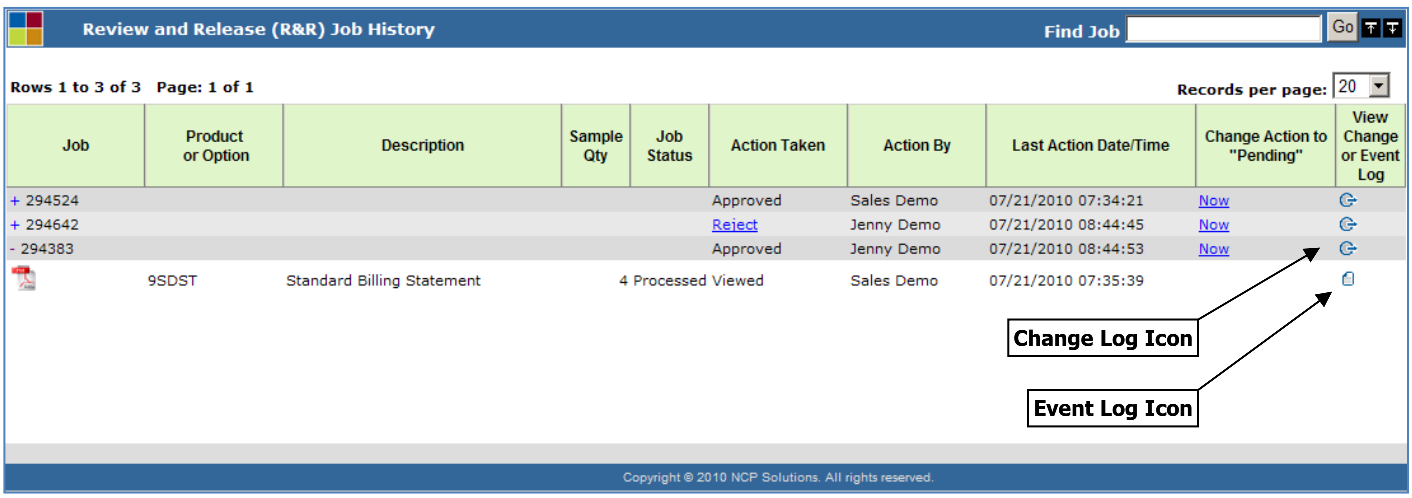
It is critical that NCP keep a detailed log of both User access Events and User Changes that are made to the system.

The **User Change History** Feature will provide the ability for NCP to log all Changes any User makes to a database table. It is important to note that this feature only records changes made by a User. It does not record changes or inserts made by the system.

The **User Event History** Feature will provide the ability for NCP to log noteworthy Events associated with a User's activities. This table will not store any Changes a User may make to the system.

User Event Log

Any item within Portal that has an associated Event Log icon will display a report showing any events that have occurred with that particular item. Click on the icon to display the Event Log.



Job	Product or Option	Description	Sample Qty	Job Status	Action Taken	Action By	Last Action Date/Time	Change Action to "Pending"	View Change or Event Log
+ 294524					Approved	Sales Demo	07/21/2010 07:34:21	Now	
+ 294642					Reject	Jenny Demo	07/21/2010 08:44:45	Now	
- 294383					Approved	Jenny Demo	07/21/2010 08:44:53	Now	
	9SDST	Standard Billing Statement	4	Processed	Viewed	Sales Demo	07/21/2010 07:35:39		

Change and Event Log icons within the R&R Job History Portlet

The Event Log displays the following information:

- Date and time of the event
- User who executed the event
- Client Number associated with the User
- Data Source or Portlet where the event originated
- Event Description
- Event identifier assigned to the event
- NCP location where the event originated

NCP portal

Review and Release (R&R) User Event Logging

Event Date	Executed By	Client Number	Portlet	Event	Event Identifier	Site
07/20/2010 02:35:32	Adrienne Sevick	00047010	R&R Log	View Sample	294383.9SDST.PDF	BHM
07/20/2010 04:42:17	Sales Demo	00047010	R&R Log	View Sample	294383.9SDST.PDF	BHM
07/20/2010 04:50:11	Joseph Tetstone	00047010	R&R Log	View Sample	294383.9SDST.PDF	BHM

User Event Log Results

User Change Log

Any item within Portal that has an associated **Change Log** icon will display a report showing detailed information on any changes that have been made to that item. Click on the icon to display the **Change Log**.

The **Change Log** report displays the following information:

- Date and time that the change was made
- User who initiated the change
- Client Number associated with the User
- Data Source or Portlet where the change originated
- Data field affected by the change
- Before and after values of the change

NCP portal

Review and Release (R&R) User Change Logging

Change Date	Changed By	Client Number	Data Source	Field that was Changed	Old Value	New Value	Site
06/30/2010 05:36:25	John Smith	00047010	Review & Release Setup	Sample Quantity	2	1	BHM
06/30/2010 05:37:30	John Smith	00047010	Review & Release Setup	Sample Type	FML	Each	BHM

User Change Log Results

The following Services are associated with access to Change History information

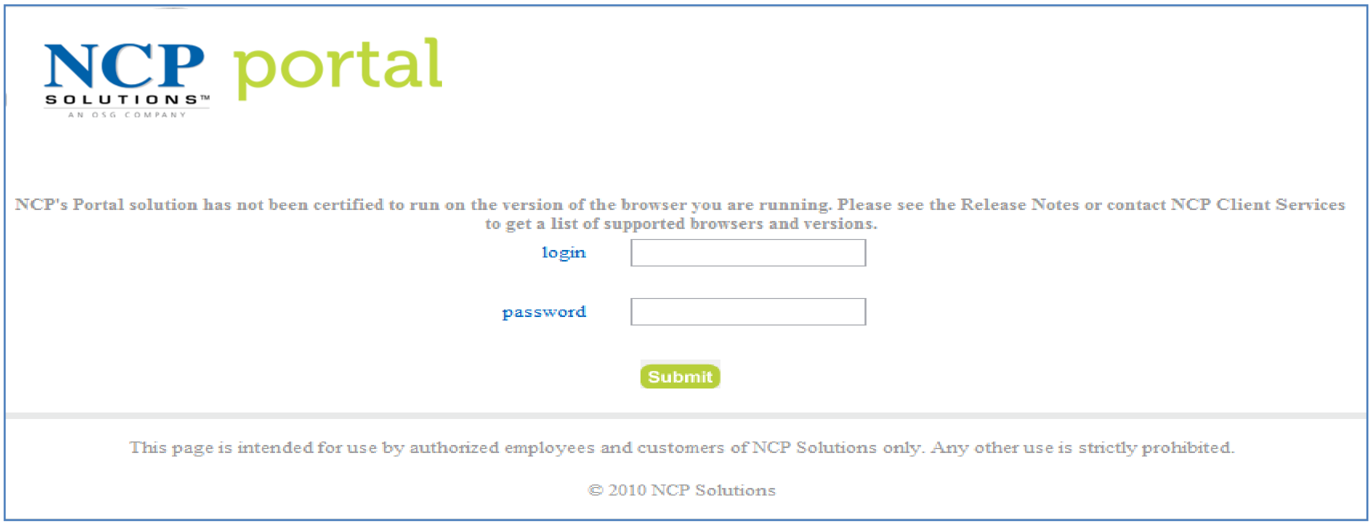
1. Change History: **Admin** Changes - Users with this service have full search capability of the Change History tables. Full search includes selecting the Data Store, Beginning Date, Ending Date, User, and Org ID.
2. Change History: **Standard** Changes - Users with this service are unable to change any search criteria, however, by default are able to view changes made by other Users and have access to a full year of changes.
3. Change History: **Limited** Changes - Users with this service are unable to change any search criteria, are only able to view their changes and have access to the prior 6 months of changes.

The following Services are associated with access to Noteworthy Event History information. Noteworthy events are defined by NCP and can change at any time.

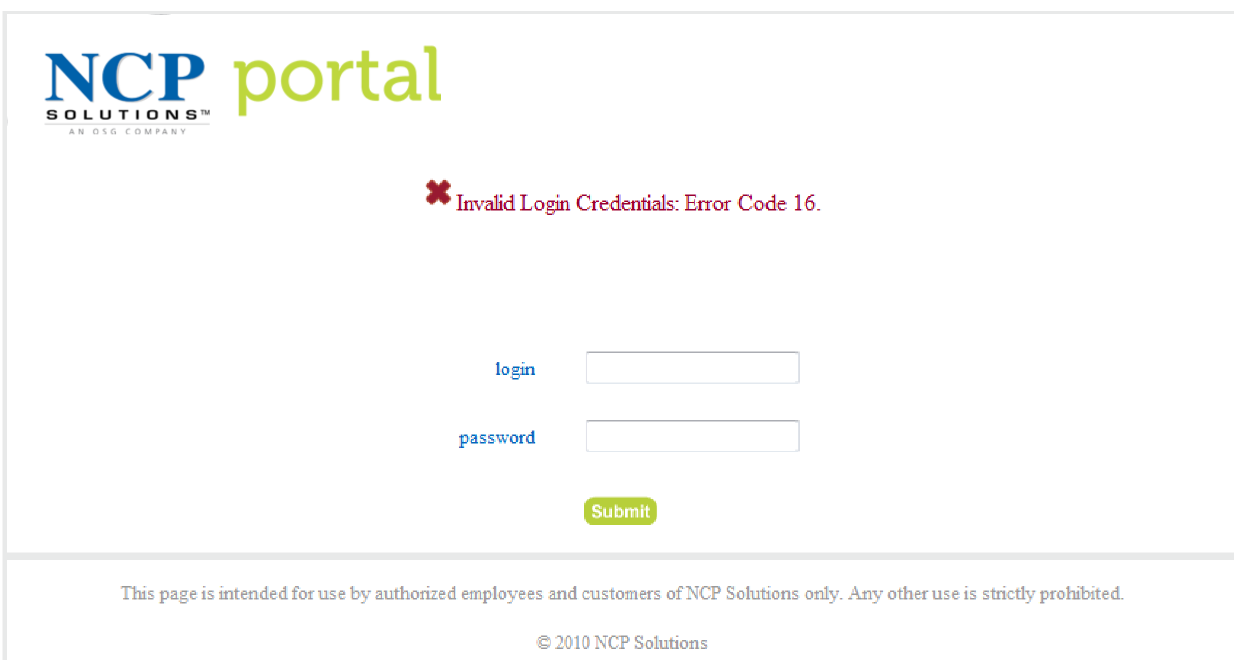
1. Event History: **Admin** Events - Users with this service have full search capability of the Change History tables. Full search includes selecting the Data Store, Beginning Date, Ending Date, User, and Org ID.
2. Event History: **Standard** Events - Users with this service are unable to change any search criteria, however, by default are able to view changes made by other Users and have access to a full year of changes.
3. Event History: **Limited** Events - Users with this service are unable to change any search criteria, are only able to view their changes and have access to the prior 6 months of changes.

Appendix A – Login Errors

Currently, NCP's Portal application is certified to run on Mozilla Firefox 22.0 and Microsoft Internet Explorer (IE) 8, 9, 10 and 11. Attempting to run Portal on older or newer versions of Internet Explorer will prompt the following error:

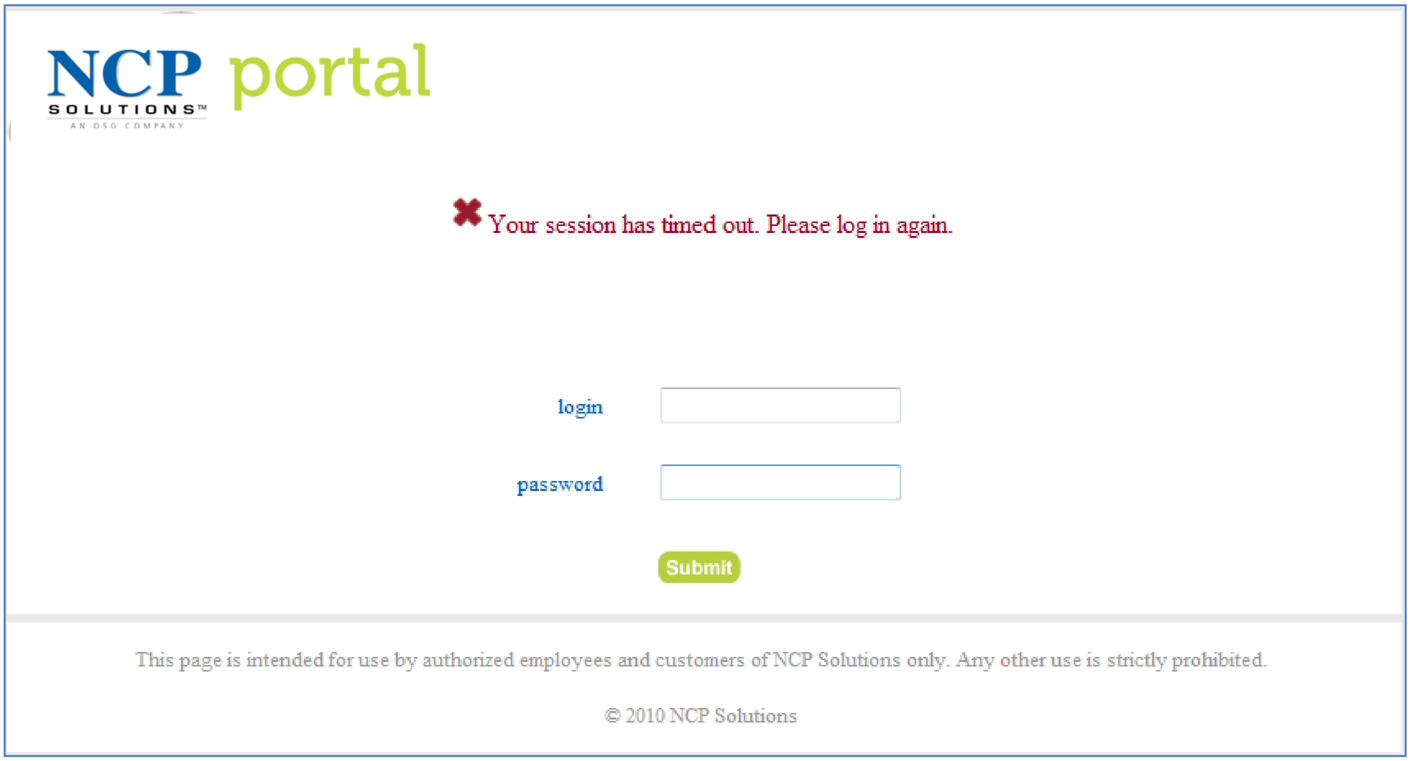


If the incorrect login credentials are entered, the error message "Invalid Login Credentials: Error Code 16" will result.

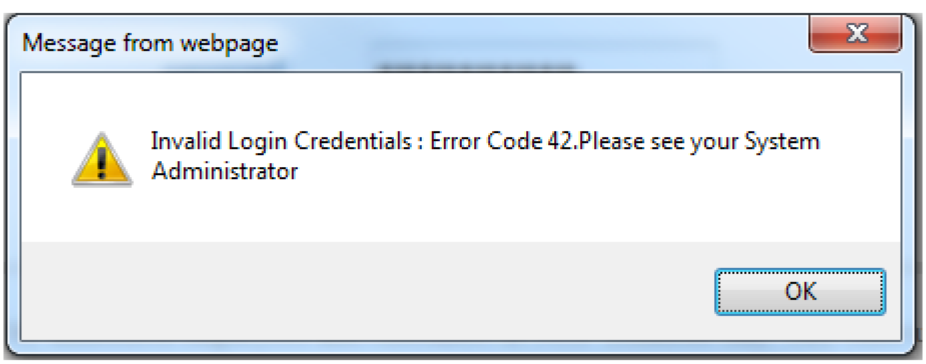


Invalid Login Message

If a User has been logged in but is inactive for more than 45 minutes, the User will be automatically be logged off and prompted to log in again.



If IP Validation has been assigned to a User, the User will not be able to log in unless their IP Address has been configured for validation by NCP. If a User's IP address has not been configured for validation and the User attempts to login to Portal, the following error will display:



Error Code 42