

Nottingham City Council

FINANCIAL SYSTEMS PORTAL LINK

FOR NCC SCHOOLS

COMMERCIAL BANKING ONLINE

REQUESTS ONLY



Safer, cleaner, ambitious
Nottingham
A city we're all proud of

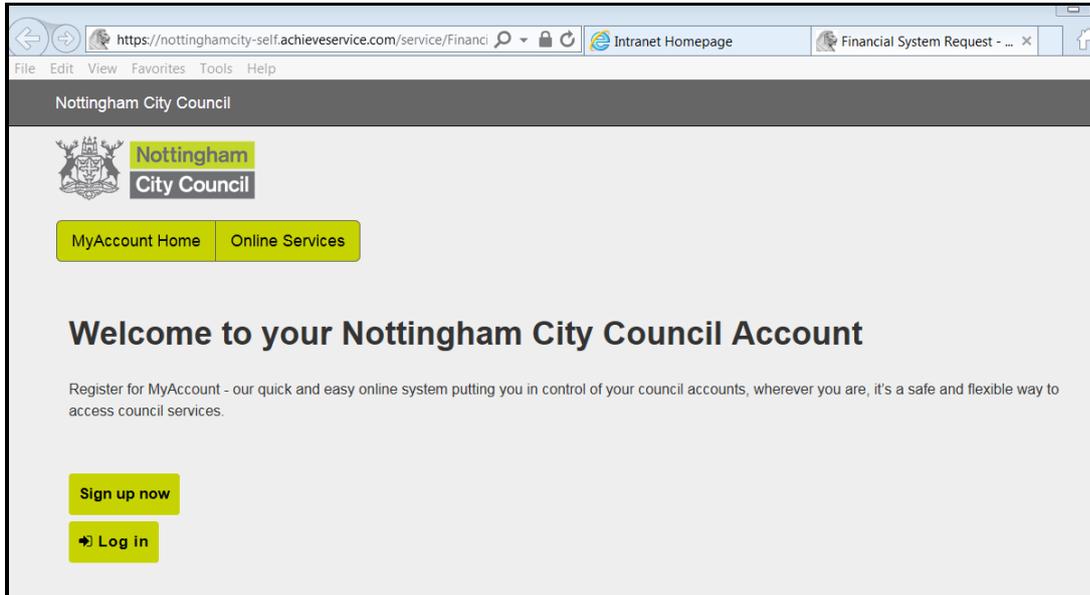


Nottingham
City Council

All NCC School users will need to **Register or Sign up now** and will have to create an account to be able to log and access the Financial Systems (FS) Portal, if you have not already done so.

Please click on the link below to access the FS Portal, this will take you to the welcome to your Nottingham City Council Account page.

https://nottinghamcity-self.achieveservice.com/service/Financial_System_Request



HOW TO CREATE AN ACCOUNT

- Enter your works Email Address
- Create a Password and Confirm Password
- Tick 'I agree to these terms and conditions'
- Click Submit

A screenshot of the 'Sign up for an account' form on the Nottingham City Council website. The form is titled 'Sign up for an account' and includes a sub-heading: 'Please enter your email and a password to register for self'. Below this, there is a section for terms and conditions: 'Before you register please agree to our privacy statement' followed by a paragraph of text and a link to the privacy statement. A radio button is checked next to the text 'I agree to these terms and conditions', with a green checkmark to its right. The form contains three input fields: 'Email' with the value 'joe.bloggs@nottinghamcity.gov.uk', 'Password' (masked with dots), and 'Confirm Password' (masked with dots). Each input field has a green checkmark to its right. At the bottom left is a 'Cancel' button and at the bottom right is a 'Submit' button.

LOGGING INTO FINANCIAL SYSTEMS PORTAL

- Enter your Email Address and Password
- Click on Sign In

The screenshot shows the Nottingham City Council website's login page. At the top left is the council's logo and name. At the top right are links for 'Register' and 'Login'. The main heading is 'Log In'. Below it are two input fields: 'Email Address' and 'Password'. There are three buttons: 'Sign In' (highlighted in yellow), 'Register' (highlighted in yellow), and 'Cancel' (highlighted in yellow). A link for 'Forgotten Your Password?' is located below the 'Sign In' button. At the bottom of the page, there is another council logo, 'Accessibility' and 'Privacy Statement' links.

Introduction/Your Details

This page will bring up your details, please wait for this to load...

- Click Next to continue

The screenshot shows the 'Introduction/Your Details' page of the Nottingham City Council Financial Systems portal. At the top, the council logo and name are on the left, and the user's name 'Suzanne Morris' is on the right. Below the logo are three yellow buttons: 'MyAccount Home', 'Online Services', and 'My Requests'. The main heading is 'Nottingham City Council Financial Systems'. Below it is a sub-heading 'Welcome to Financial Systems Portal'. There are three tabs: 'Introduction/Your Details' (selected), 'Select Service', and 'Submit'. A blue box contains the text: 'Welcome to the Financial System Request Form. The form is regularly reviewed as we receive feedback from users. If you have any suggestions, new feature requests or problems, please email: income.management@nottinghamcity.gov.uk. Thank you'. Below this is a table of user details with green checkmarks indicating they are correct:

First Name	Suzanne	✓
Surname	Morris	✓
Job Title		
Email Address	suzanne.morris@nottinghamcity.gov.uk	✓

At the bottom left is a 'Cancel' button and at the bottom right is a 'Next >' button.

Select Service

- Click on **Lloyds Commercial Banking Online**
- Click Next to continue

Note:

The screenshot below is an example, the FS Portal is updated on a regular basis so may change.

The screenshot displays the Nottingham City Council Financial Systems portal. At the top, the council's name and logo are visible, along with navigation buttons for 'MyAccount Home', 'Online Services', and 'My Requests'. The main heading is 'Nottingham City Council Financial Systems', followed by a welcome message and a breadcrumb trail: 'Introduction/Your Details' > 'Select Service' > 'Lloyds Commercial Banking Online' > 'Submit'. A prompt asks the user to 'Please choose a service'. A list of services is presented as buttons, with 'Lloyds Commercial Banking Online' highlighted in green and circled in red. Other services include 'Civica Account / Reset Passwords', 'E Return Banking', 'Civica Short Code', 'New Merchant Number with New Chip & Pin', 'Request New Chip & Pin with Existing Merchant ID', 'Re-Configure Card Terminal', 'Cancel Merchant/Chip & Pin', 'Allpay Accounts', 'Request For Information', 'PayGate & BACS (Direct Debit)', and 'Bank Reconciliation Requests'. Navigation buttons for 'Previous', 'Cancel', and 'Next' are located at the bottom.

Lloyds Commercial Banking Online

- Click on the relevant boxes you want to request to the Income Management Team.
- Complete all fields with as much information

Note:

The screenshot below is an example, the FS Portal is updated on a regular basis so may change.

Management are to request the following only:-

- New Lloyds User Accounts
- Amend Existing Lloyds User Account.

All Users can request any of the others, unless this is flagged up in red for Management to submit.

There is also help text where it displays a Question Mark (?) at the side of the fields.

The screenshot displays the Nottingham City Council Financial Systems Portal. At the top, it shows the council's name and logo, along with the user's name, Suzanne Morris. Below this are navigation buttons for 'MyAccount Home', 'Online Services', and 'My Requests'. The main heading is 'Nottingham City Council Financial Systems', with a sub-heading 'Welcome to Financial Systems Portal'. A breadcrumb trail includes 'Introduction/Your Details', 'Select Service', 'Lloyds Commercial Banking Online', and 'Submit'. The 'Lloyds Commercial Banking Online' section is active, showing a list of user requests and administration options. The 'User Requests' section includes: 'New Lloyds User Account' (with a red border and a question mark icon), 'Amend Existing Lloyds User Account', 'Delete User Account', and 'Temporary Suspend User Account'. The 'User Administration' section includes: 'Unlock Account and Password Reset', 'Order New Security PIN', 'Order New Smartcard', and 'Order New Card Reader Device'. Below these are two text input fields: 'CBO Username ID *' (with a red border and a question mark icon) and 'Please provide other general details if you wish' (with a question mark icon). At the bottom, there are navigation buttons: '< Previous', 'x Cancel', and 'Next >'.

See example on the next page, a request for a New User Account.

User Requests	<input checked="" type="button" value="New Lloyds User Account"/> <input type="button" value="Amend Existing Lloyds User Account"/> <input type="button" value="Delete User Account"/> <input type="button" value="Temporary Suspend User Account"/>	
Do you have Senior or Line Management responsibility for the account holder? *	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Choose Role	<input checked="" type="button" value="Payments User (create or approve)"/> <input checked="" type="button" value="Account and Balance Statements (view statements)"/>	
User Administration	<input type="button" value="Unlock Account and Password Reset"/> <input type="button" value="Order New Security PIN"/> <input type="button" value="Order New Smartcard"/> <input type="button" value="Order New Card Reader Device"/>	
Request access to *	<input checked="" type="radio"/> Create Payments <input type="radio"/> Approve Payments	
	<small> Please note, if you are approving payments there will be another form to complete once you have been set up</small>	
Organisation or School *	<input type="text" value="Nottingham City Council"/>	
CBO Username ID *	<input type="text" value="CBOTESTUSER"/>	
Title (e.g Mrs) *	<input type="text" value="Miss"/>	
Name of User(s) *	<input type="text" value="Gemma Jones"/>	
Job Title or Position *	<input type="text" value="Administrator"/>	
Service Area or Name of School *	<input type="text" value="Commercial Banking Team"/>	

Full Address details *	<input type="text" value="Loxley House
Station Street
Nottingham
NG2 3NG"/>	
Contact Telephone Number *	<input type="text" value="0115 8761356"/>	
User Email address(es) *	<input type="text" value="gemma.jones@nottinghamcity.gov.uk"/>	
Bank Account Number(s) *	<input type="text" value="309016 51265321"/>	
Name of Bank Account(s) *	<input type="text" value="NCC EXAMPLE OF BANK"/>	
Access to same Bank Accounts as User	<input type="text" value="SAME AS JOE BLOGGS"/>	
Please provide other general details if you wish	<input type="text"/>	
	<small> Please provide any other details to support your request</small>	

- Click Next to continue

Submitting

- Click on option Yes or No
- Click Submit

Nottingham City Council Suzanne

Nottingham City Council

MyAccount Home Online Services My Requests

Nottingham City Council Financial Systems

Welcome to Financial Systems Portal

Introduction/Your Details Select Service Lloyds Commercial Banking Online **Submit**

The form is now complete. You will be contacted with details of your request via email.

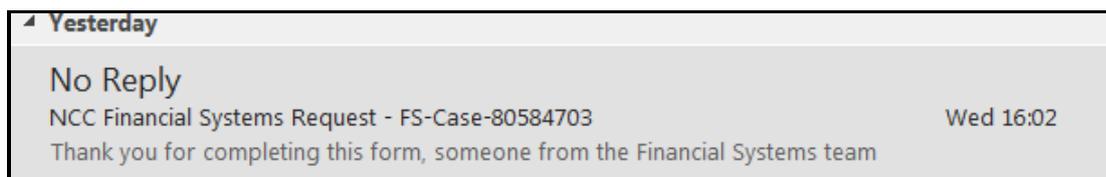
If you have any questions regarding your request, or if you did not receive email confirmation please contact:

income.management@nottinghamcity.gov.uk

Please click Submit

Would you like to submit a new request after this one? Yes No

Once you have submitted the request, you will receive a FS Case Reference number, see example, below. If you do not received one, then please contact income.management@nottinghamcity.gov.uk.



LOGGING OUT OF FINANCIAL SYSTEMS PORTAL

- At the top right hand corner, click Logout.

