GL-16 Run Auto Post

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Run Auto Post process in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the two methods of running Auto Post process in NCFS that enable users to post journal batches in bulk based on a pre-defined Auto Post criteria set. The methods are as follows:

1. Run Auto Post through Journals app.
2. Run Auto Post through Scheduled Processes app.

User Tip

The following are prerequisites to creating and uploading a journal from spreadsheet:

1. User must download desktop integration installer for using ADFDI spreadsheet (Navigation: Tools >> Download Desktop Integration Installer).

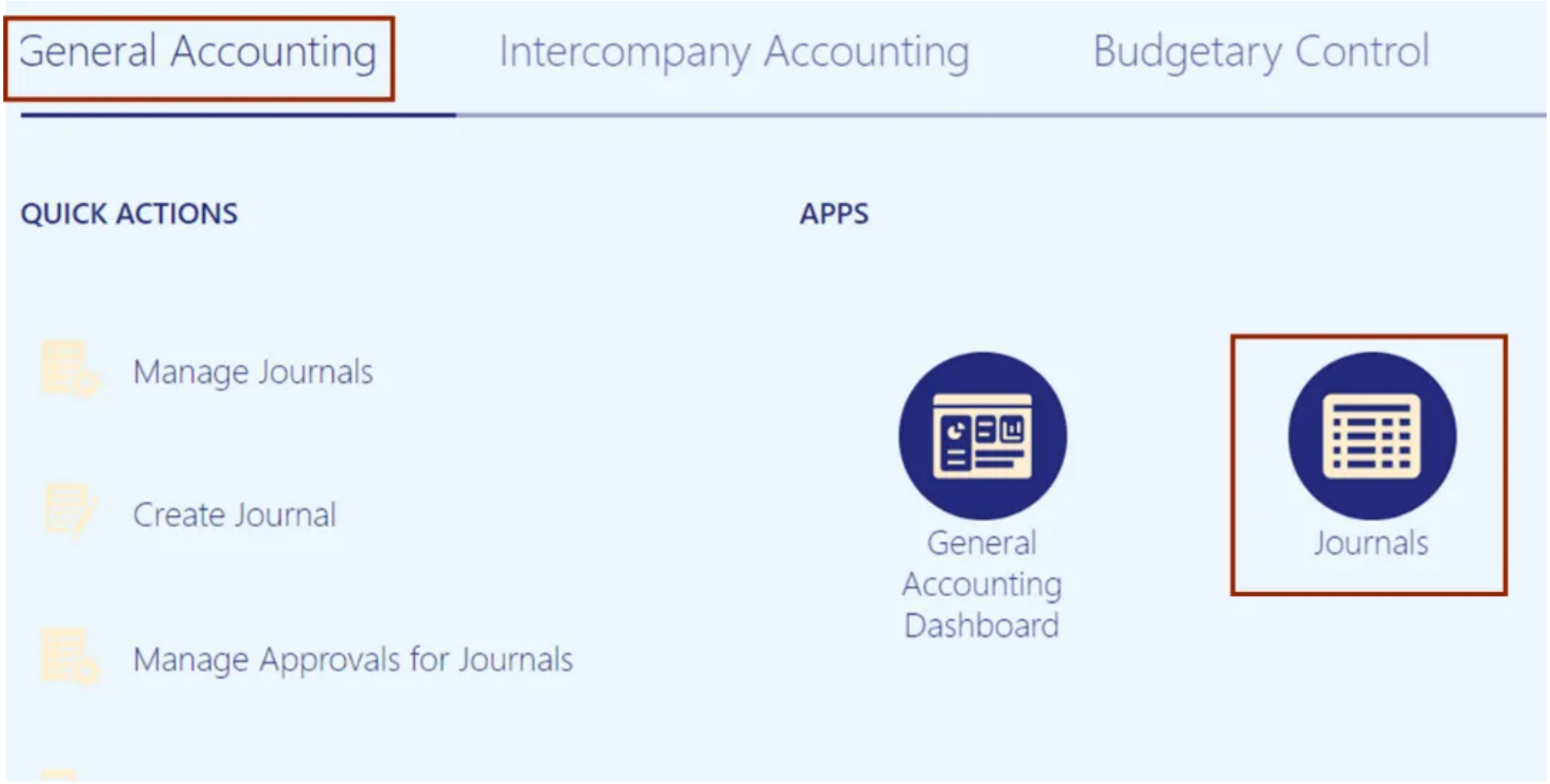
Run Auto Post through Journals Page

To Run Auto Post in NCFS, please follow the steps below. There are 14 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

Step 2. On the **Home** page, click the **General Accounting** tab. Click the **Journals** app.

Image



Step 3. Click on the **Tasks** icon. On the Tasks Pane, click on **Run AutoPost**.

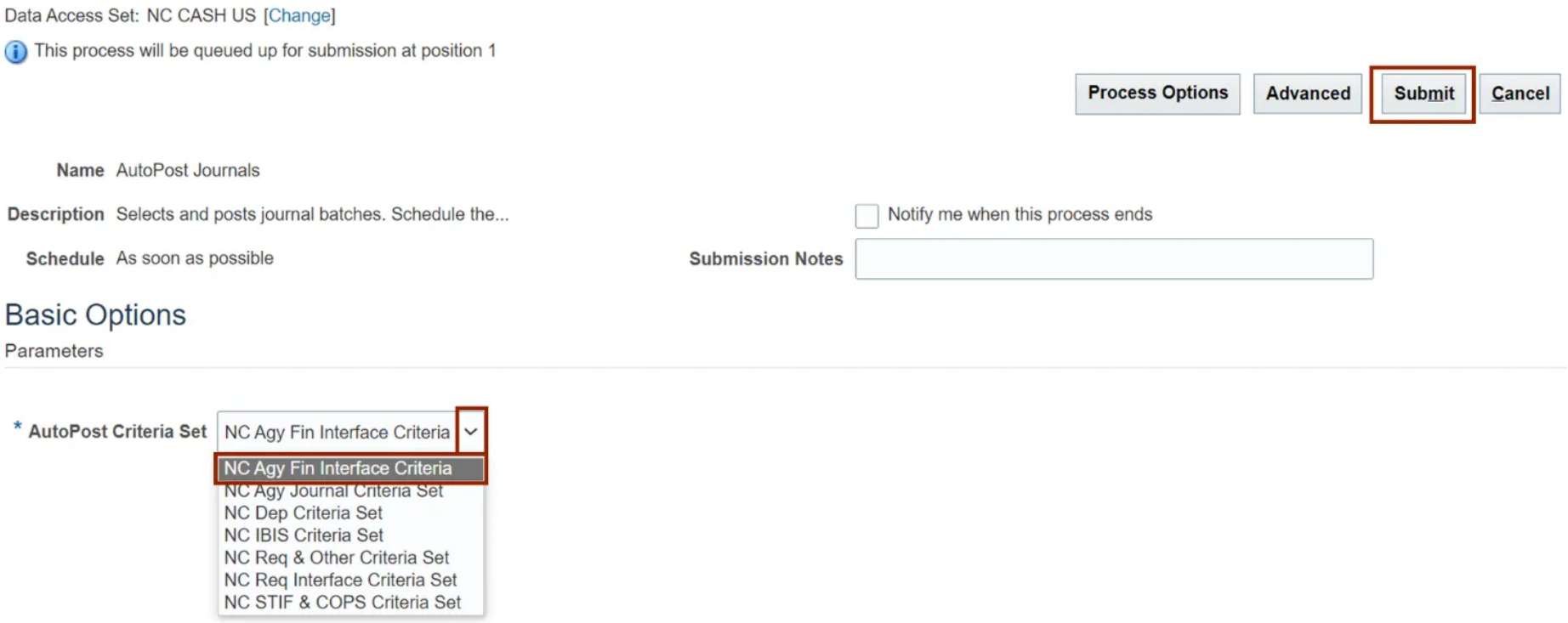
Image



Step 4. The **Basic Options** page opens, select the applicable ***AutoPost Criteria Set*** from the drop-down choice list.

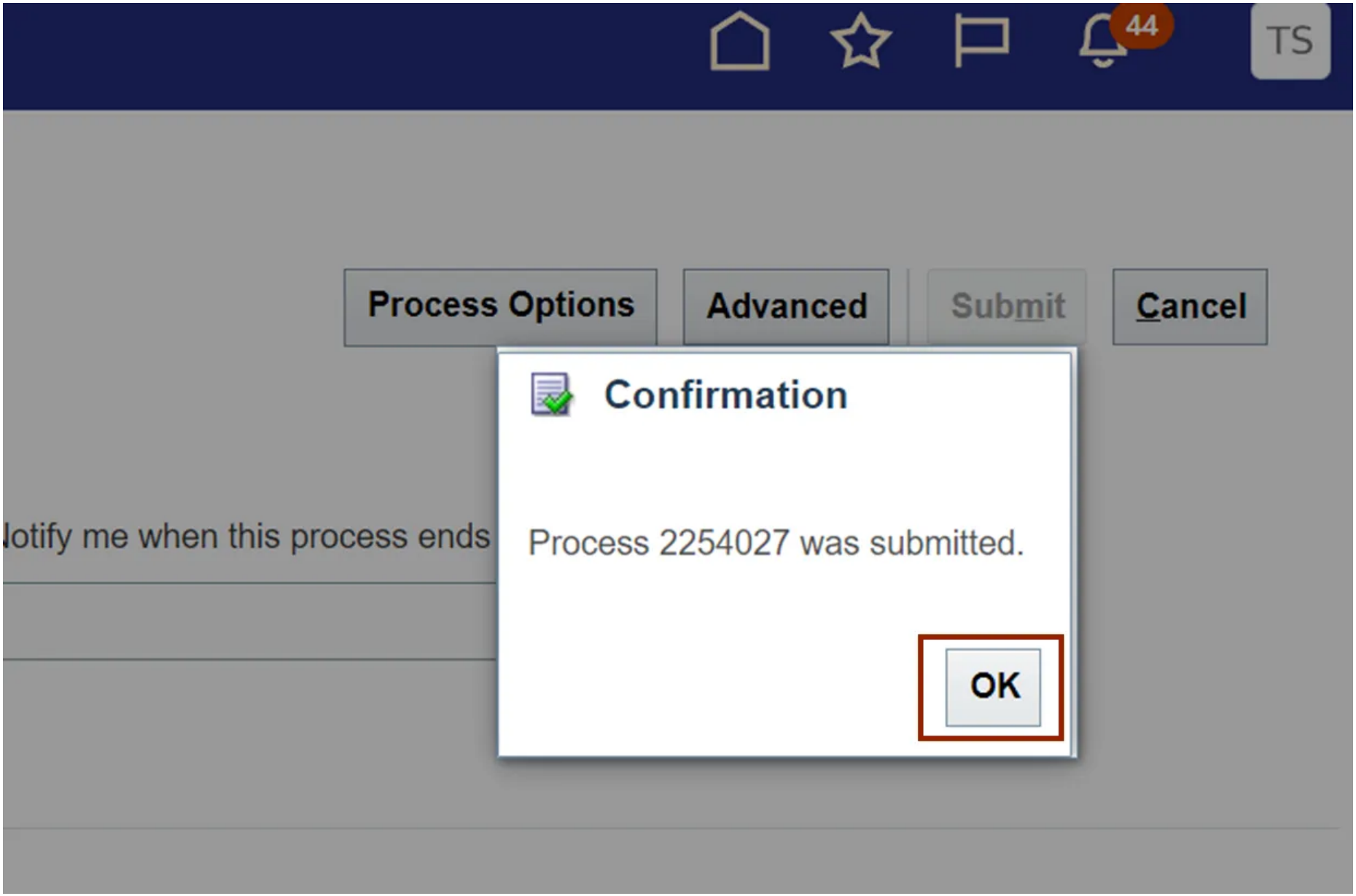
In this example, we choose **NC Agy Fin Interface Criteria** for ***AutoPost Criteria Set***. Then, click the **Submit** button.

Image



Step 5. The *Confirmation* pop-up appears with the **Process ID** number. Click the **OK** button.

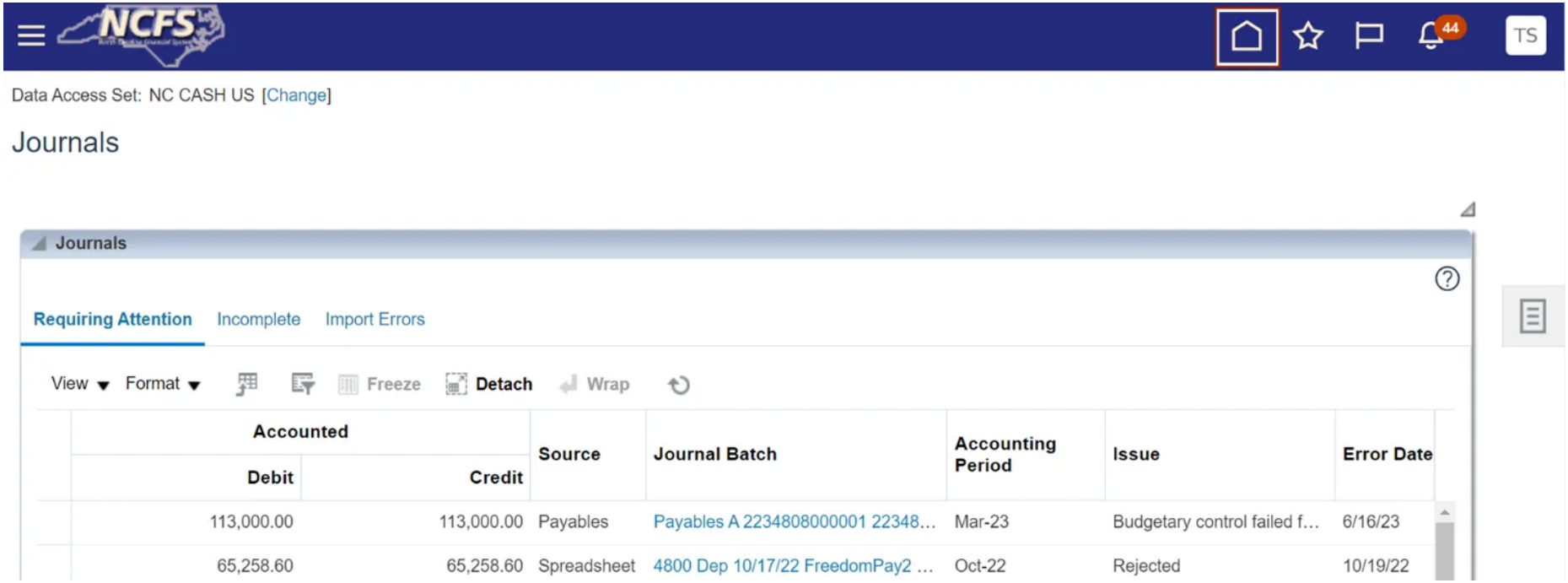
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Step 6. Click the **Home** icon on the Global Header.

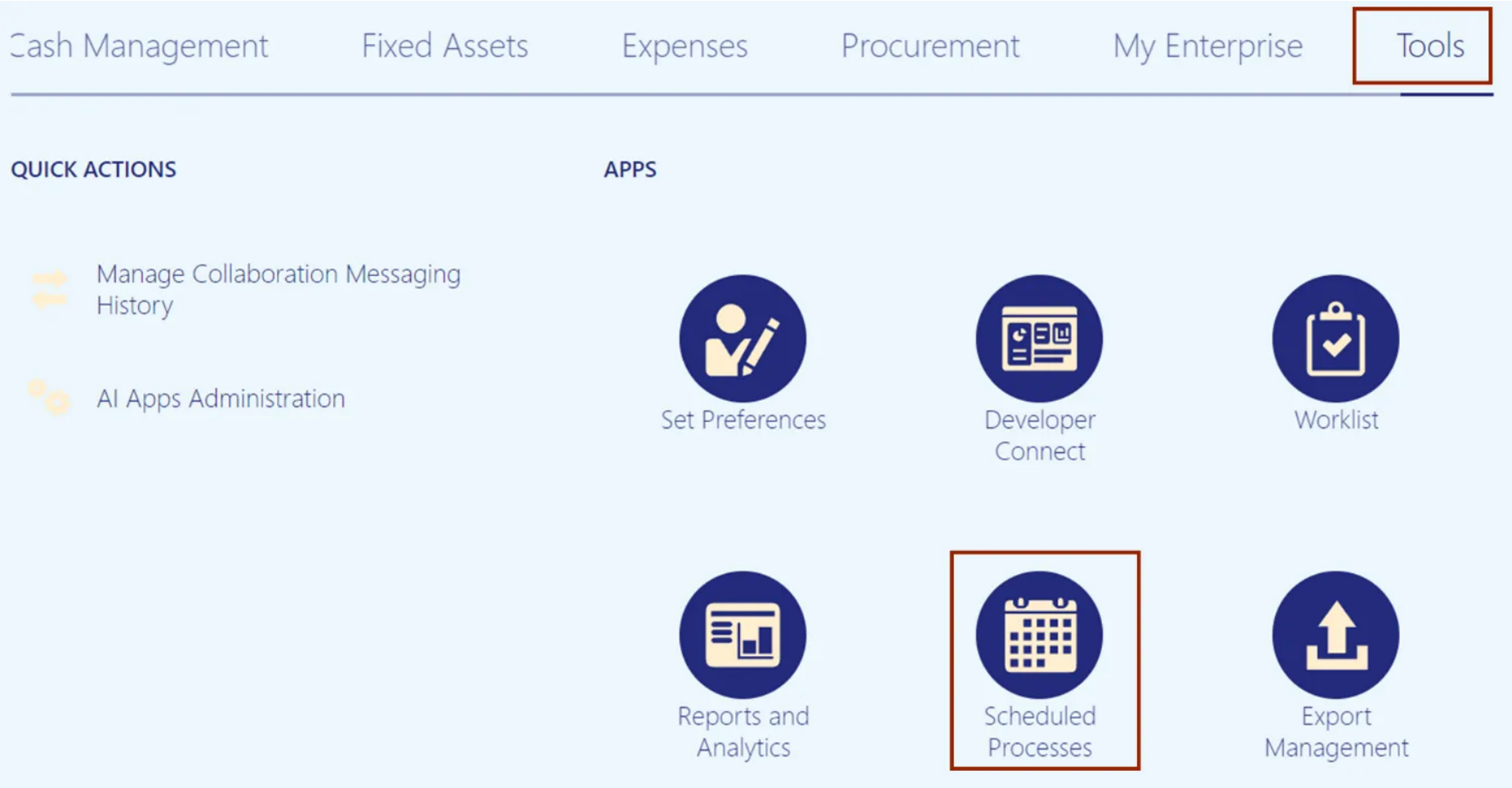
Note: Steps 6 through 11 are required to monitor the status of the process submitted and to download the output file of the AutoPost process.

Image



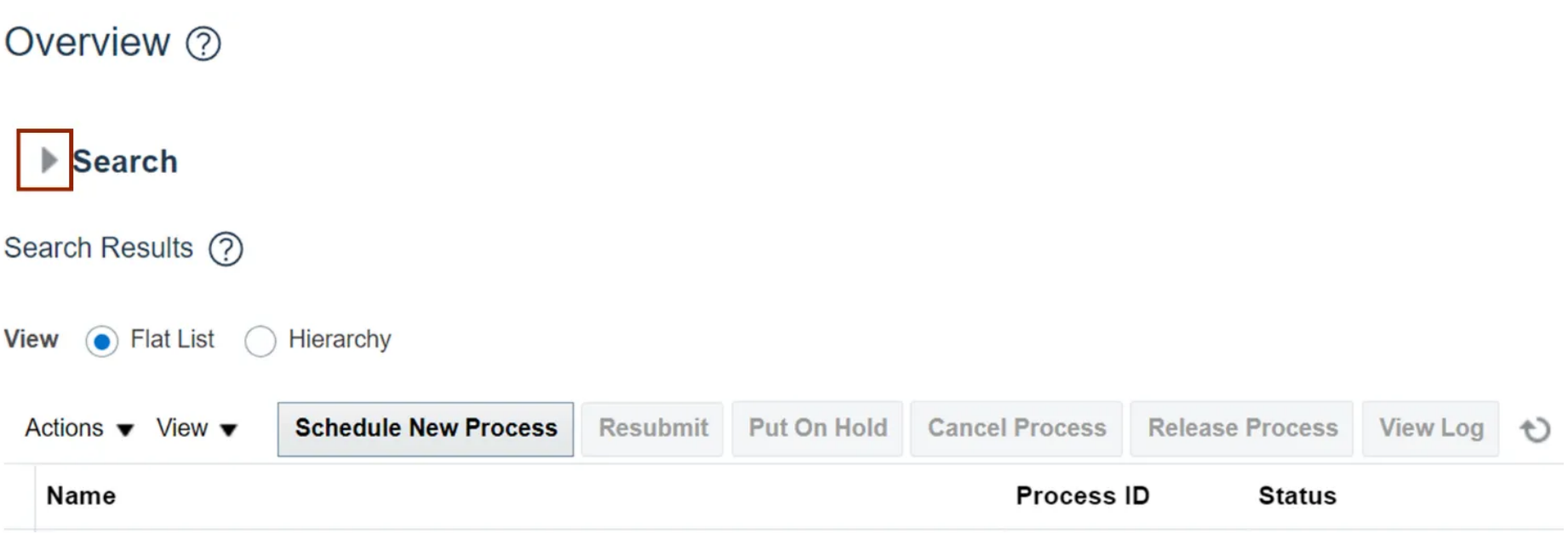
Step 7. On the **Home** page, click the **Tools** tab. Click the **Scheduled Processes** app.

Image



Step 8. On the Overview page, expand the Search section by clicking on the right arrow.

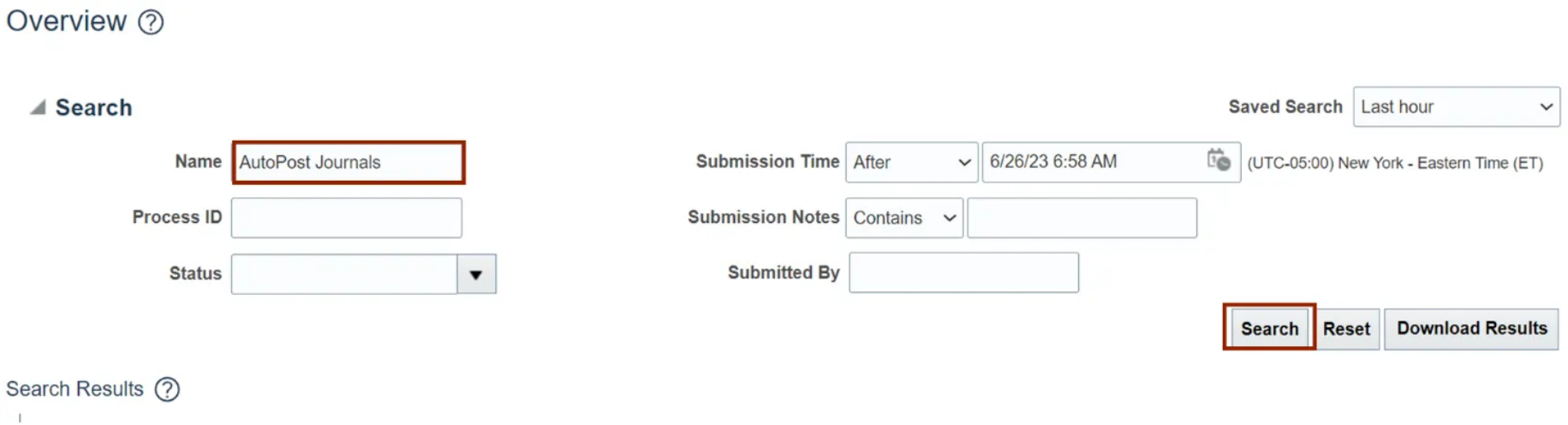
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Step 9. Fill the required details in the fields.

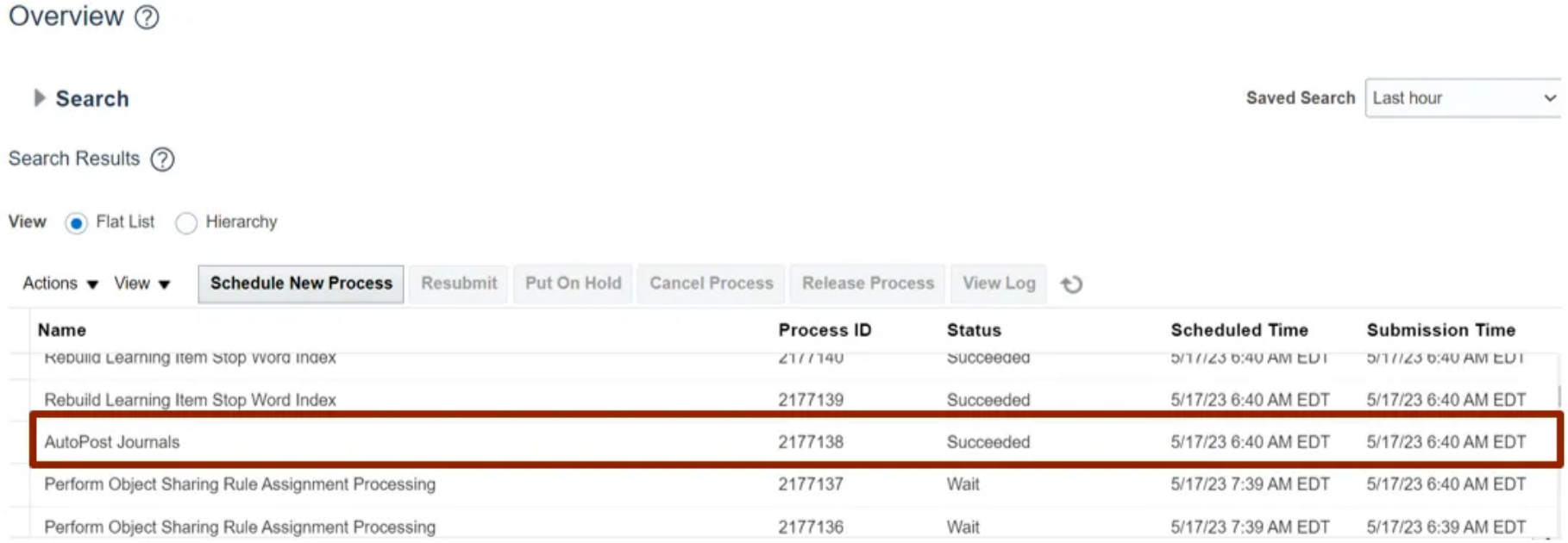
In this example, we choose to fill **AutoPost Journals** in the ***Name*** field. Then, click the **Search** button.

Image



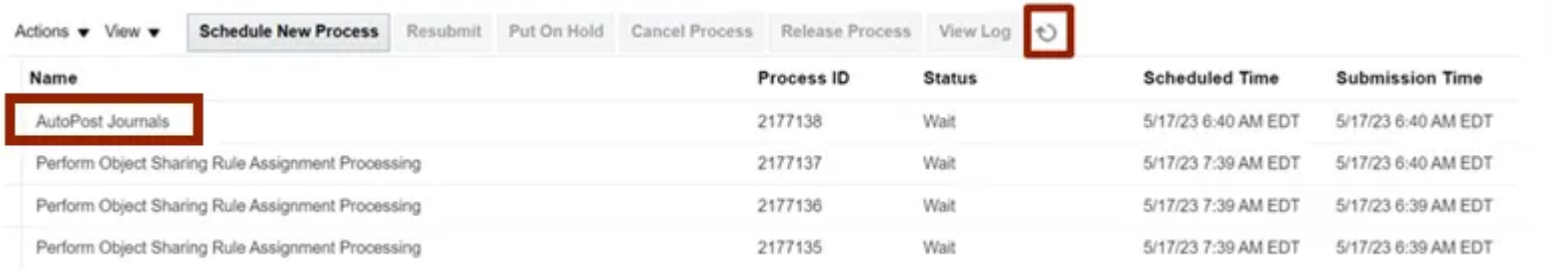
Step 10. Select **AutoPost Journals** under the ***Name*** section.

Image



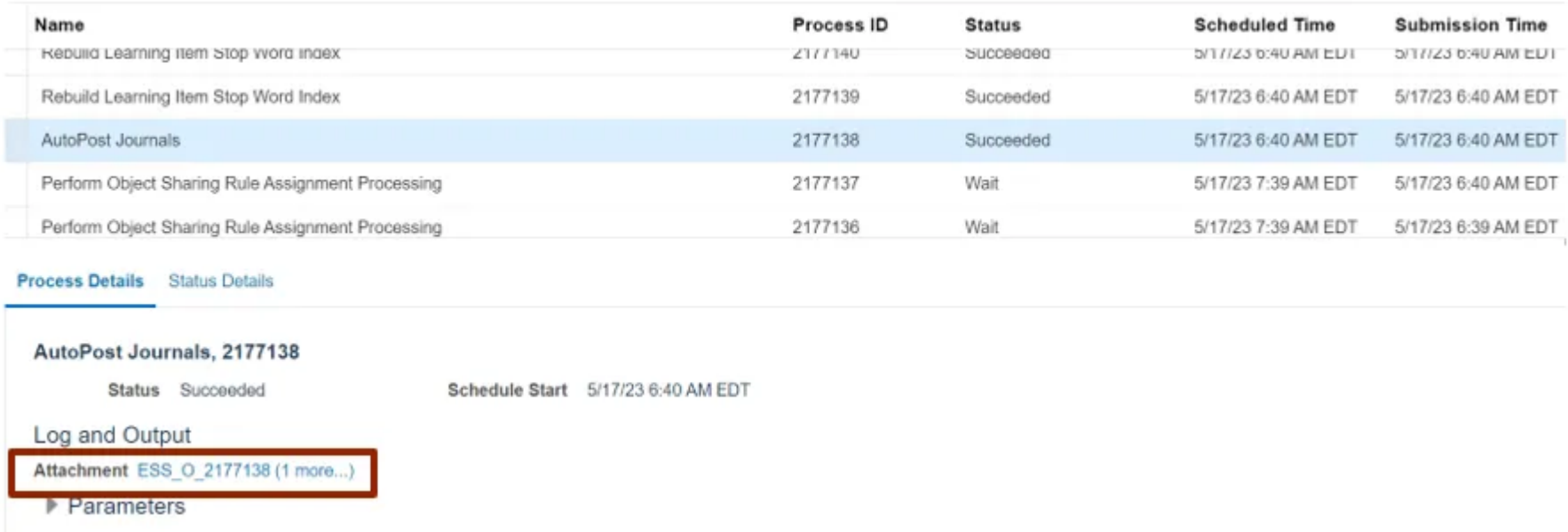
Step 11. The *Overview* page is displayed. Click the **Refresh** icon until the **Status** field displays **Succeeded**.

Image



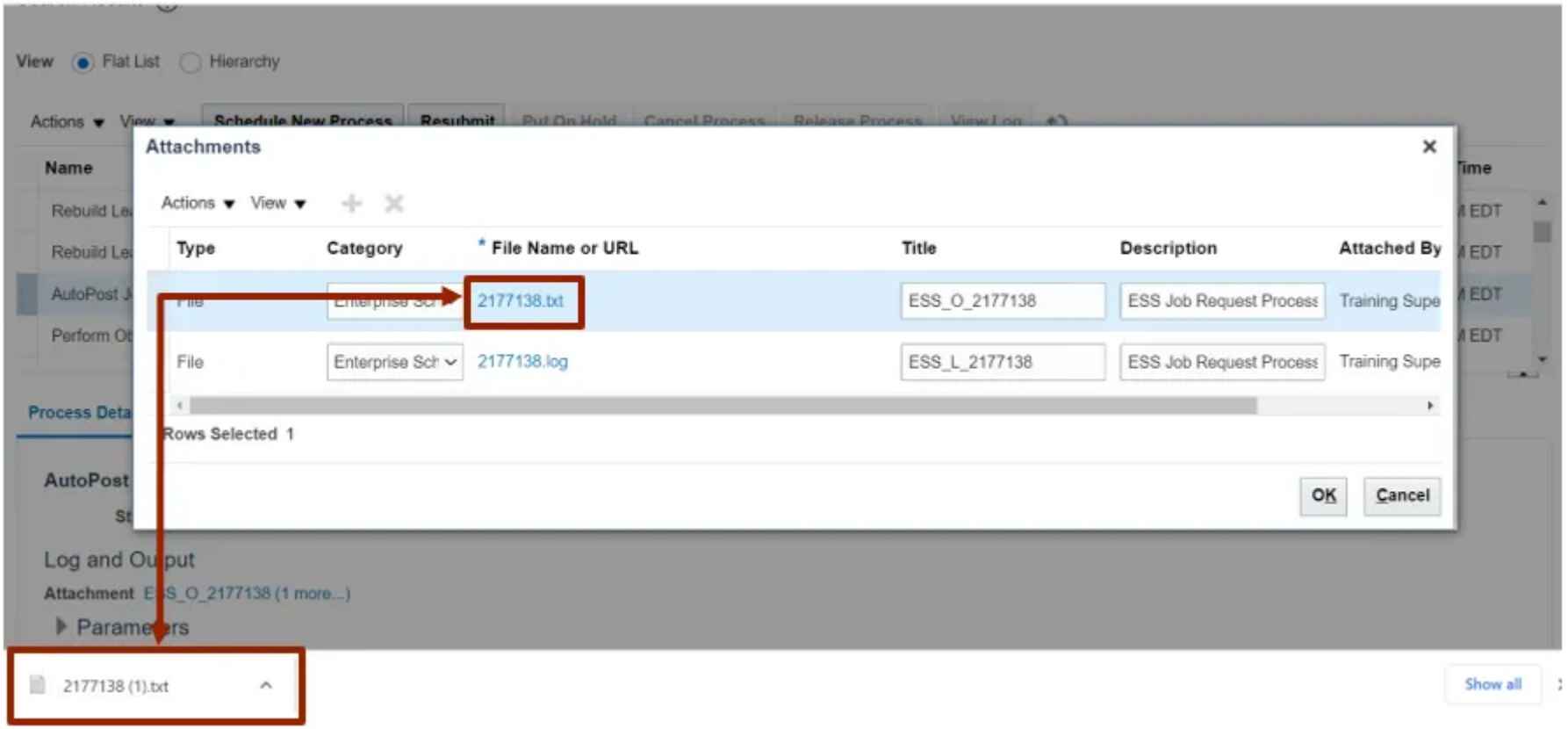
Step 12. At the bottom of the **Overview** page, navigate to the ***Process Details*** section and click the **Attachment** link.

Image



Step 13. On the *Attachments* pop-up page two outputs will be displayed. Click on the .txt ***File Name or URL*** to download the output.

Image



Step 14. Output of the txt file will look like what is shown below.

Image

NC CASH US AutoPost Execution Report

AutoPost Criteria Set: NC Agy Fin Interface Criteria
The following batches with priority: 1 were selected for posting:

Batch Name Period

No batches were selected for posting for this priority.

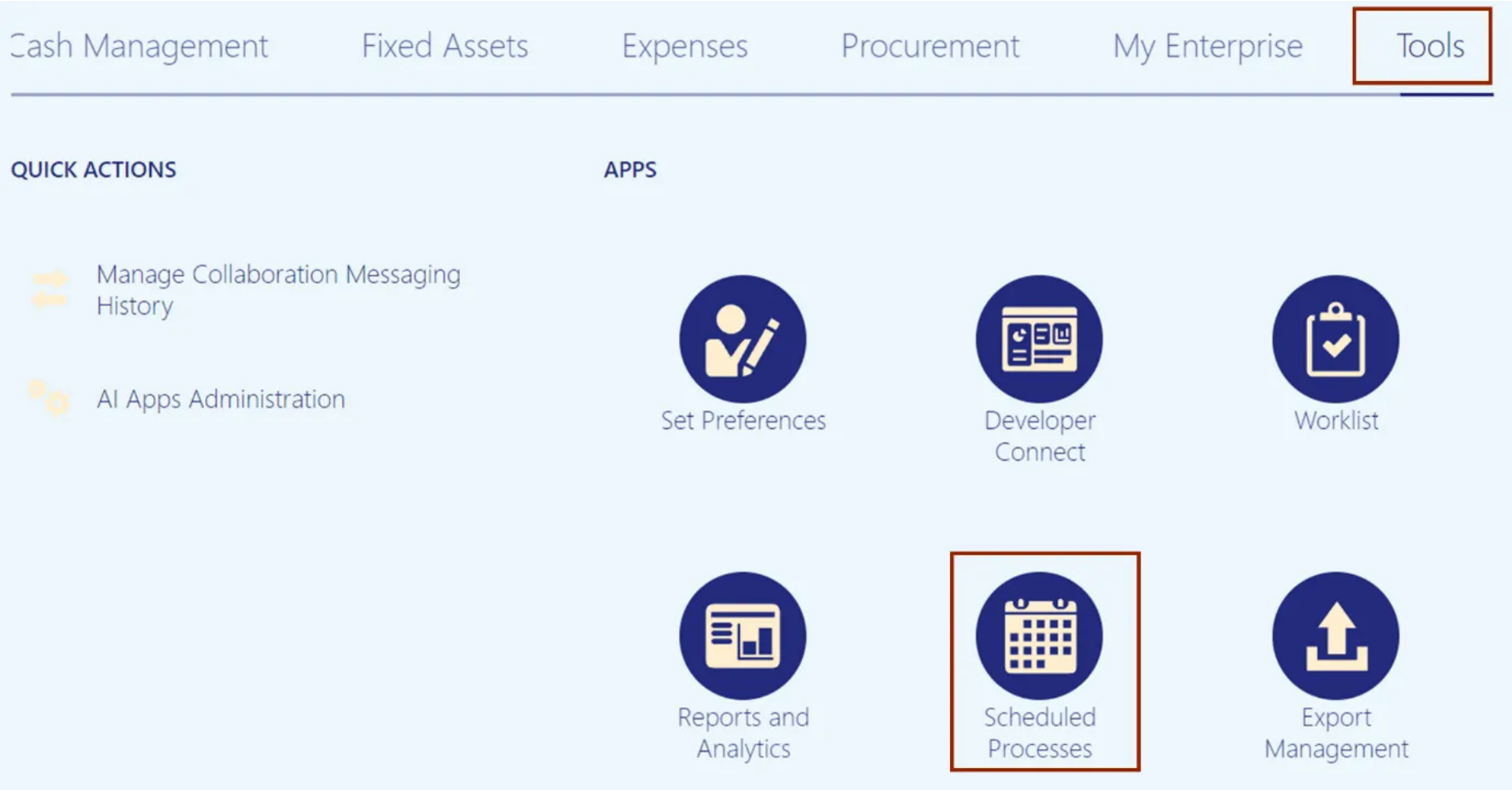
Run Auto Post through Scheduled Processes

To Run Auto Post through **Scheduled Processes** app in NCFS, please follow the steps below. There are 11 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

Step 2. On the **Home** page, click the **Tools** tab. Click the **Scheduled Processes** app.

Image



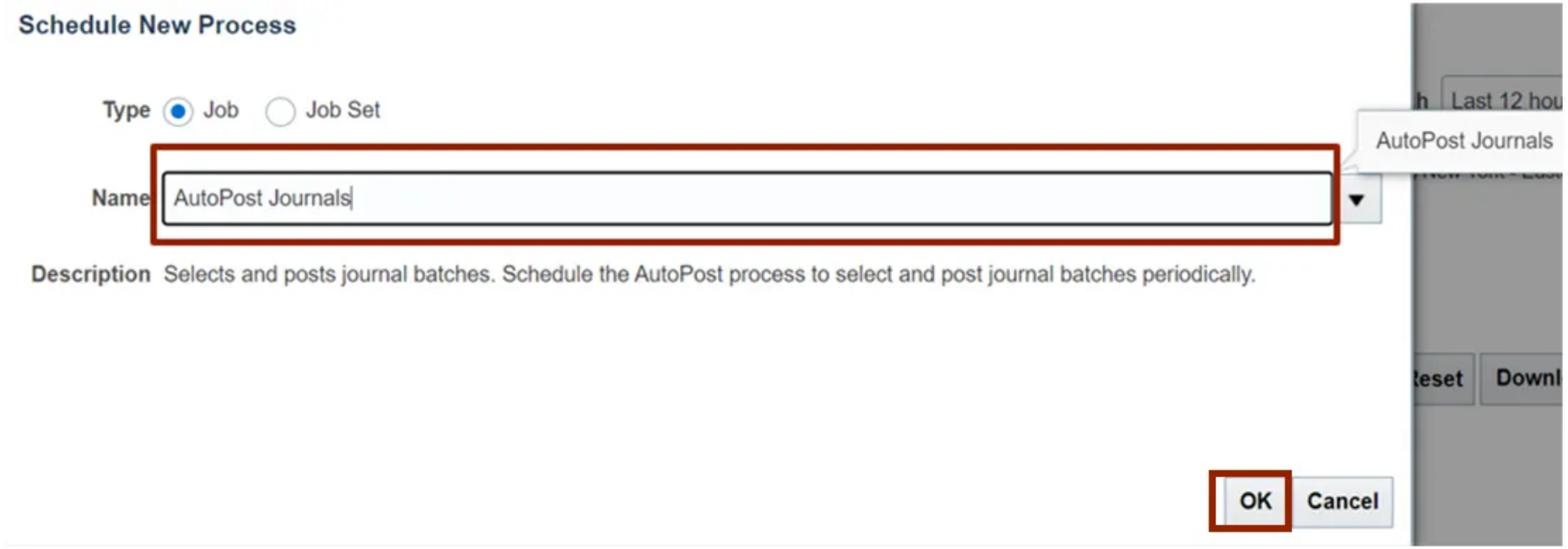
Step 3. On the **Schedule Processes Overview** page, click the **Schedule New Process** button.

Image



Step 4. On the *Schedule New Process* pop-up page, enter **AutoPost Journals** in the ***Name*** field. Alternatively, you can search from the ***Name*** drop-down choice list. Click the **OK** button.

Image



Step 5. On the *Process Details* pop-up page, select the applicable ***AutoPost Criteria Set*** name from the respective drop-down choice list. Click the **Submit** button.

Image

Process Details

This process will be queued up for submission at position 1

Process Options | Advanced | Submit | Cancel

Name AutoPost Journals

Description Selects and posts journal batches. Schedule the...

Notify me when this process ends

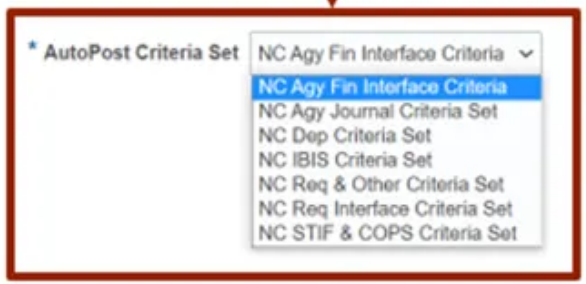
Schedule As soon as possible

Submission Notes

Basic Options

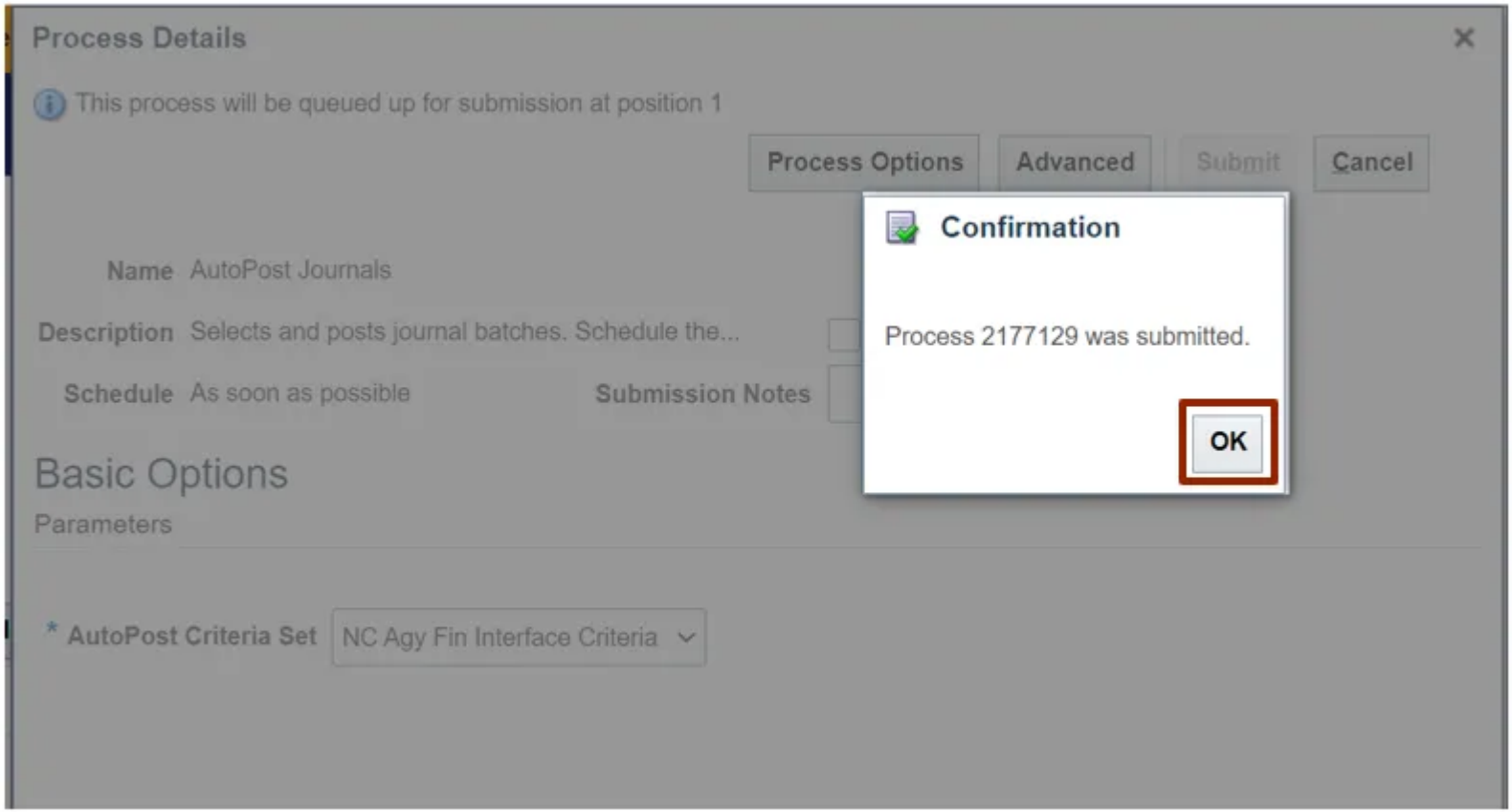
Parameters

* **AutoPost Criteria Set** NC Agy Fin Interface Criteria



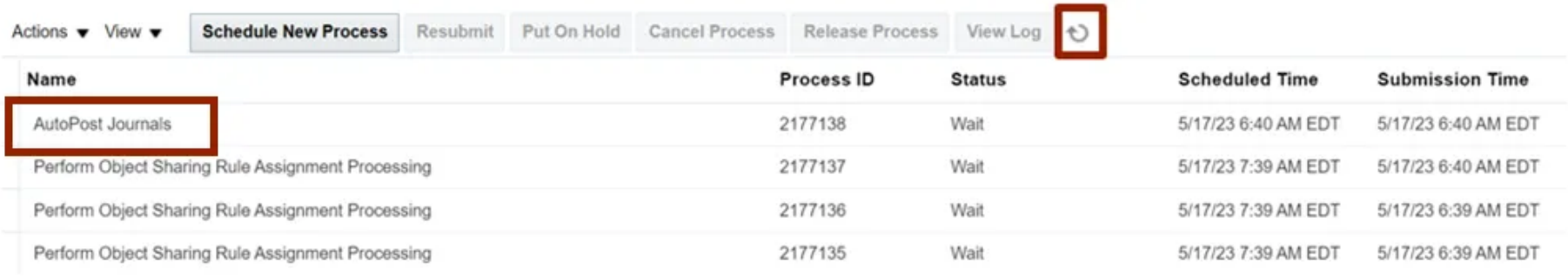
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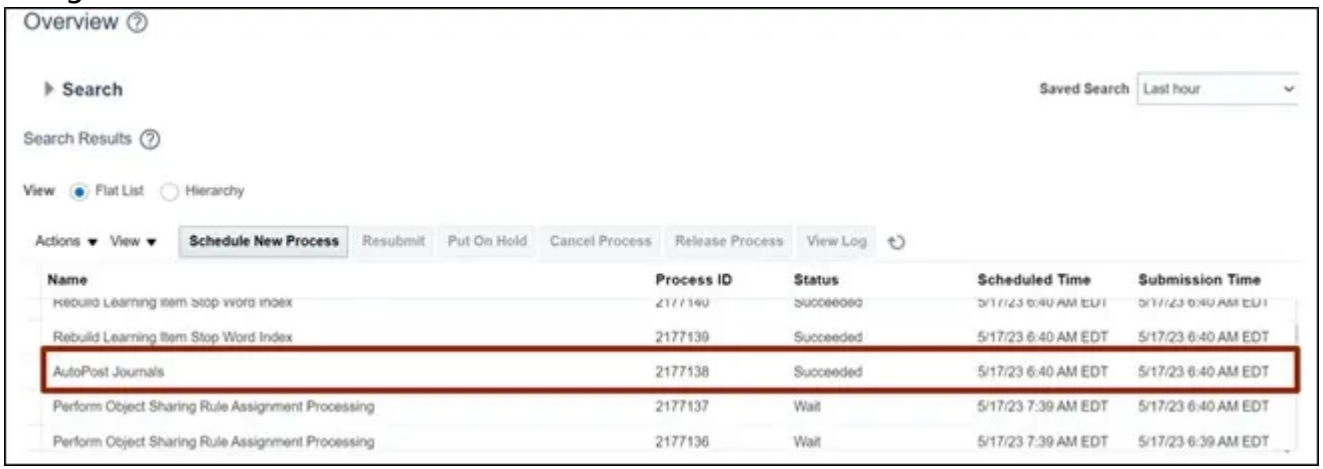
Step 7. The *Overview* screen is displayed. Click the **Refresh** icon until the ***Status*** field displays **Succeeded**.

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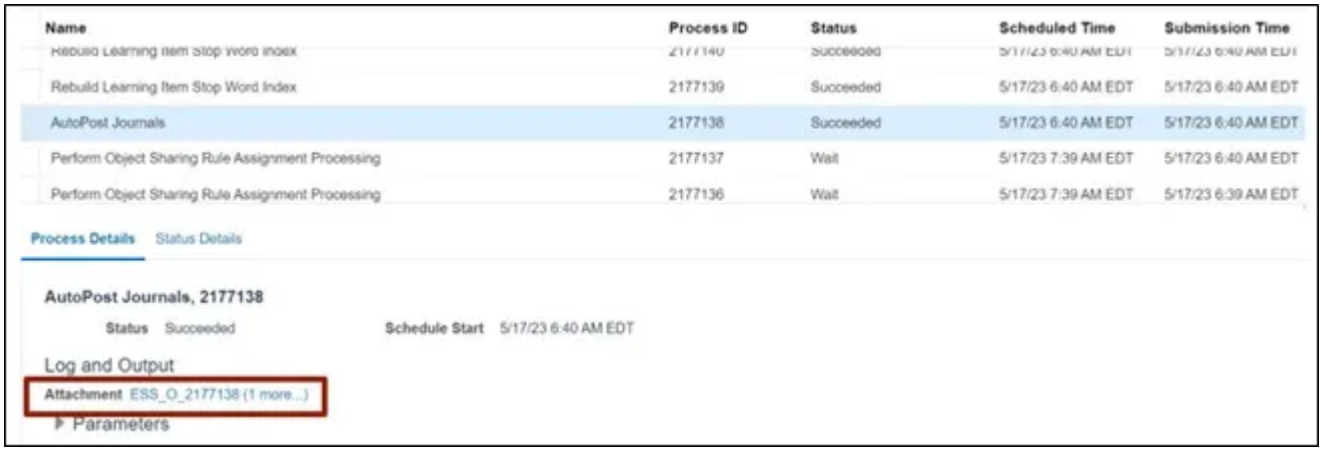
Step 8. Select **AutoPost Journals** under the ***Name*** section.

Image



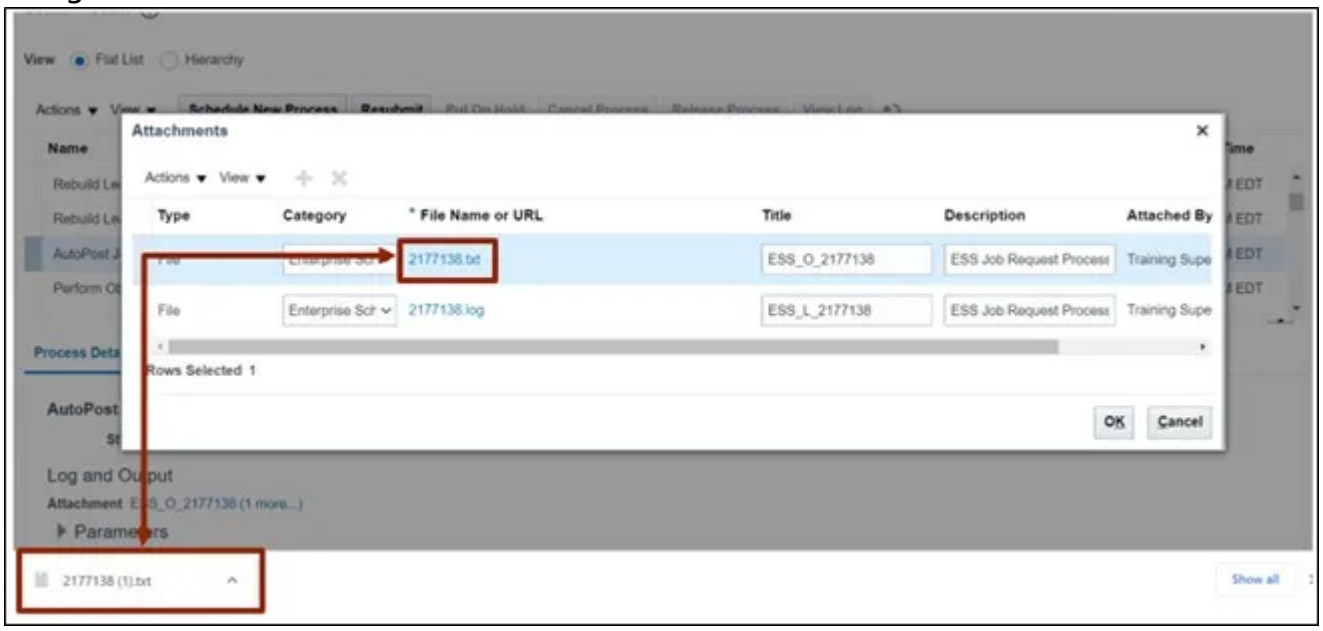
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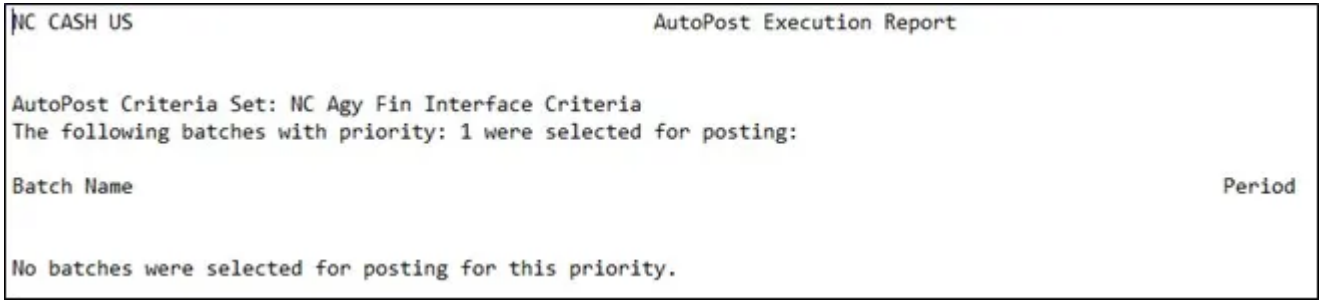
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Step 11. Output of the txt file will look like what is shown below.

Image



Wrap-Up

The Auto Post Journal process can be run through the above shown two ways, which enables users to post journal batches in bulk based on a pre-defined Auto Post criteria set.

Additional Resources

- Virtual Instructor-Led Training (vILT)
  - GL 102: Journals Posting

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