



RUN AUTO POST

GL

QUICK REFERENCE GUIDE GL-16

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 Run Auto Post:

1. Auto Post Criteria Set should be created.

Run Auto Post through Journals Page

To Run Auto Post in NCFS, please follow the steps below:

1. Log in to the NCFS portal with your credentials to access the system.
2. On the **Home** page, click the **General Accounting** tab. Click the **Journals** app.

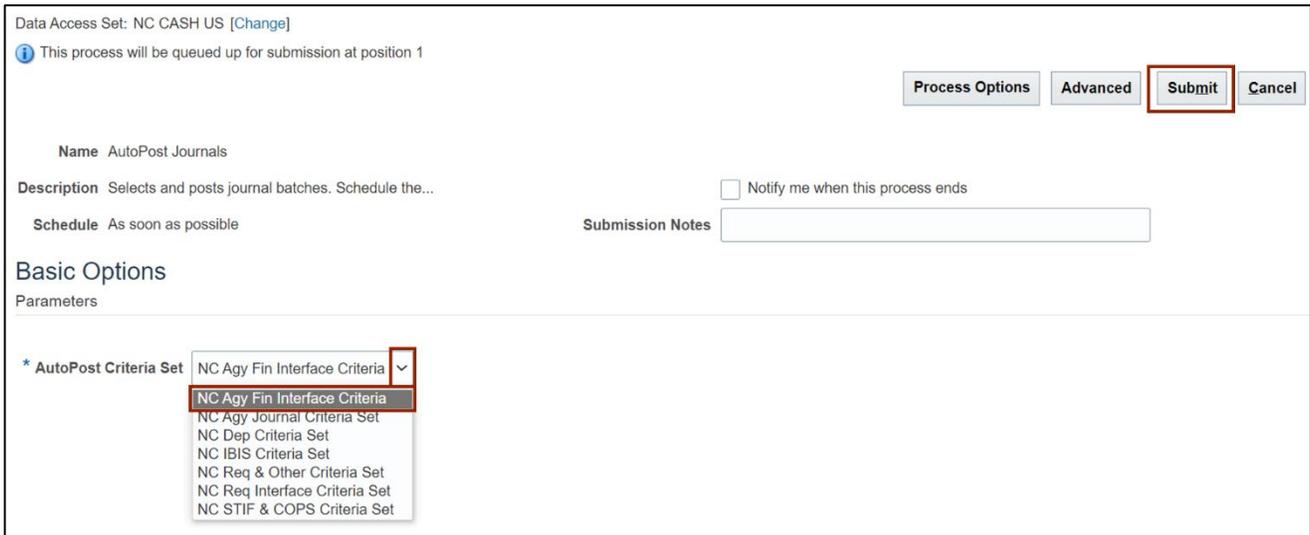


3. Click on the **Tasks** [] icon. On the Tasks Pane, click on **Run AutoPost**.

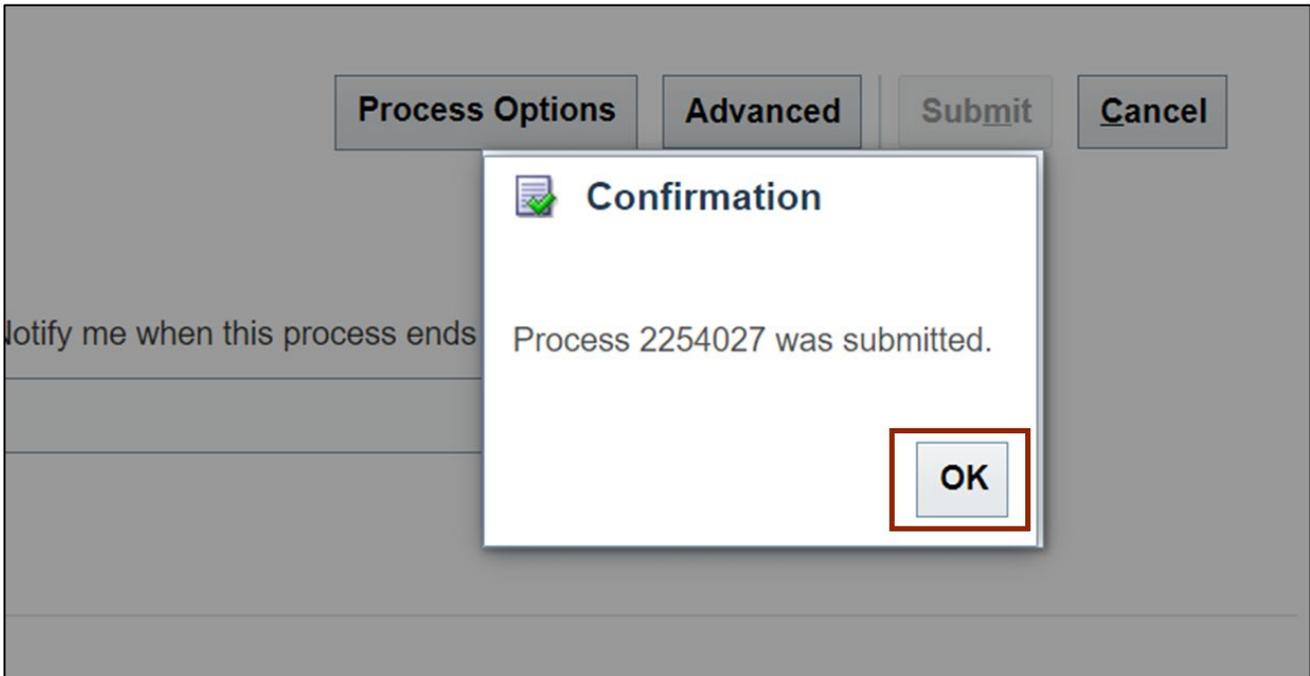


4. The **Basic Options** page opens, select the applicable ***AutoPost Criteria Set** from the drop-down choice list.

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

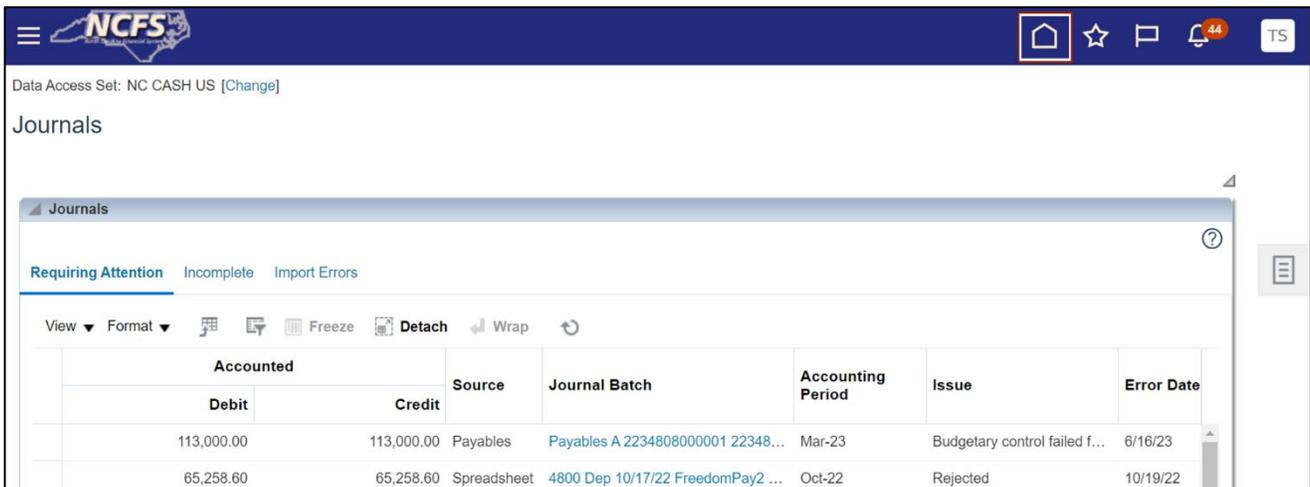


5. The *Confirmation* pop-up appears with the **Process ID** number. Click the **OK** button.



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.



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

The screenshot shows the Home page navigation menu with the following tabs: Cash Management, Fixed Assets, Expenses, Procurement, My Enterprise, and **Tools** (highlighted with a red box). Below the tabs, there are two sections: QUICK ACTIONS and APPS. Under QUICK ACTIONS, there are two items: Manage Collaboration Messaging History and AI Apps Administration. Under APPS, there are six icons: Set Preferences, Developer Connect, Worklist, Reports and Analytics, **Scheduled Processes** (highlighted with a red box), and Export Management.

8. On the **Overview** page, expand the **Search** section by clicking on the **right [▶] arrow**.

The screenshot shows the Overview page with the following elements: Overview (?), **Search** (with a right arrow icon highlighted by a red box), Search Results (?), View options (Flat List selected, Hierarchy), and a row of action buttons: Actions ▼, View ▼, **Schedule New Process**, Resubmit, Put On Hold, Cancel Process, Release Process, and View Log ↻. Below the buttons is a table header with columns: Name, Process ID, and Status.

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.

Overview ?

Search

Name

Process ID

Status

Submission Time After 6/26/23 6:58 AM (UTC-05:00) New York - Eastern Time (ET)

Submission Notes Contains

Submitted By

Search Results ?

Search Reset Download Results

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

Overview ?

Search

Search Results ?

View Flat List Hierarchy

Actions View Schedule New Process Resubmit Put On Hold Cancel Process Release Process View Log

Name	Process ID	Status	Scheduled Time	Submission Time
Rebuild Learning Item Stop Word Index	2177140	Succeeded	5/17/23 6:40 AM EDT	5/17/23 6:40 AM EDT
Rebuild Learning Item Stop Word Index	2177139	Succeeded	5/17/23 6:40 AM EDT	5/17/23 6:40 AM EDT
AutoPost Journals	2177138	Succeeded	5/17/23 6:40 AM EDT	5/17/23 6:40 AM EDT
Perform Object Sharing Rule Assignment Processing	2177137	Wait	5/17/23 7:39 AM EDT	5/17/23 6:40 AM EDT
Perform Object Sharing Rule Assignment Processing	2177136	Wait	5/17/23 7:39 AM EDT	5/17/23 6:39 AM EDT

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

Actions View Schedule New Process Resubmit Put On Hold Cancel Process Release Process View Log 

Name	Process ID	Status	Scheduled Time	Submission Time
AutoPost Journals	2177138	Wait	5/17/23 6:40 AM EDT	5/17/23 6:40 AM EDT
Perform Object Sharing Rule Assignment Processing	2177137	Wait	5/17/23 7:39 AM EDT	5/17/23 6:40 AM EDT
Perform Object Sharing Rule Assignment Processing	2177136	Wait	5/17/23 7:39 AM EDT	5/17/23 6:39 AM EDT
Perform Object Sharing Rule Assignment Processing	2177135	Wait	5/17/23 7:39 AM EDT	5/17/23 6:39 AM EDT

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

Name	Process ID	Status	Scheduled Time	Submission Time
Rebuild Learning Item Stop Word Index	2177140	Succeeded	5/17/23 6:40 AM EDT	5/17/23 6:40 AM EDT
Rebuild Learning Item Stop Word Index	2177139	Succeeded	5/17/23 6:40 AM EDT	5/17/23 6:40 AM EDT
AutoPost Journals	2177138	Succeeded	5/17/23 6:40 AM EDT	5/17/23 6:40 AM EDT
Perform Object Sharing Rule Assignment Processing	2177137	Wait	5/17/23 7:39 AM EDT	5/17/23 6:40 AM EDT
Perform Object Sharing Rule Assignment Processing	2177136	Wait	5/17/23 7:39 AM EDT	5/17/23 6:39 AM EDT

Process Details | Status Details

AutoPost Journals, 2177138

Status: Succeeded | Schedule Start: 5/17/23 6:40 AM EDT

Log and Output

Attachment ESS_O_2177138 (1 more...)

Parameters

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

View: Flat List | Hierarchy

Actions: View | + | X

Type	Category	* File Name or URL	Title	Description	Attached By
File	Enterprise Sch	2177138.txt	ESS_O_2177138	ESS Job Request Process	Training Supe
File	Enterprise Sch	2177138.log	ESS_L_2177138	ESS Job Request Process	Training Supe

Rows Selected: 1

OK | Cancel

2177138 (1).txt

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

```

NC CASH US                               AutoPost Execution Report

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

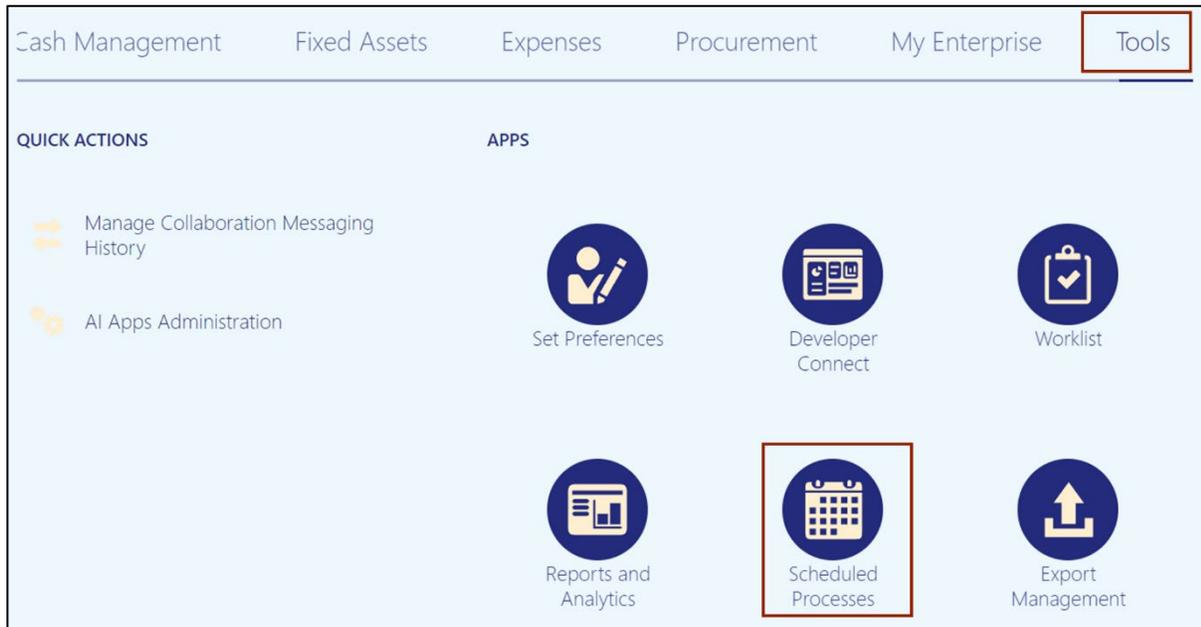
Batch Name                                Period

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:

1. Log in to the NCFS portal with your credentials to access the system.
2. On the **Home** page, click the **Tools** tab. Click the **Scheduled Processes** app.



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



- 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.

Schedule New Process

Type Job Job Set

Name

Description Selects and posts journal batches. Schedule the AutoPost process to select and post journal batches periodically.

OK Cancel

- 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.

Process Details [Close]

i 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

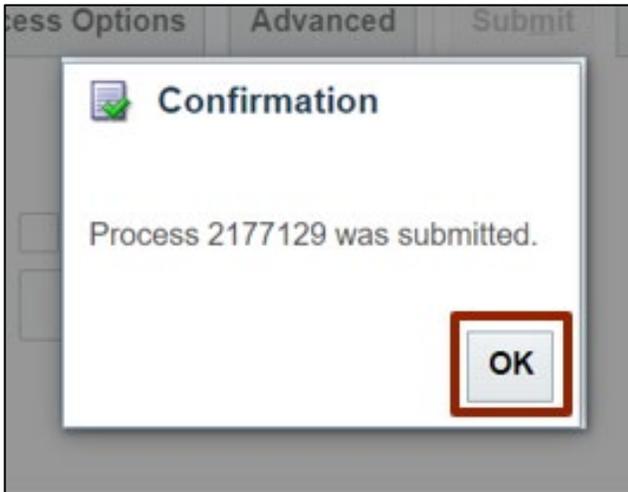
Parameters

* AutoPost Criteria Set [Dropdown]

* AutoPost Criteria Set [Dropdown List]

- NC Agy Fin Interface Criteria
- NC Agy Journal Criteria Set
- NC Dep Criteria Set
- NC IBIS Criteria Set
- NC Req & Other Criteria Set
- NC Req Interface Criteria Set
- NC STIF & COPS Criteria Set

- The *Confirmation* pop-up page is displayed with the **Process ID** number. Click the **OK** button.



- The *Overview* screen is displayed. Click the **Refresh** [↻] icon until the **Status** field displays **Succeeded**.

Name	Process ID	Status	Scheduled Time	Submission Time
AutoPost Journals	2177138	Wait	5/17/23 6:40 AM EDT	5/17/23 6:40 AM EDT
Perform Object Sharing Rule Assignment Processing	2177137	Wait	5/17/23 7:39 AM EDT	5/17/23 6:40 AM EDT
Perform Object Sharing Rule Assignment Processing	2177136	Wait	5/17/23 7:39 AM EDT	5/17/23 6:39 AM EDT
Perform Object Sharing Rule Assignment Processing	2177135	Wait	5/17/23 7:39 AM EDT	5/17/23 6:39 AM EDT

- Select **AutoPost Journals** under the **Name** section.

Overview ?

Search [Saved Search: Last hour]

Search Results ?

View: Flat List Hierarchy

Name	Process ID	Status	Scheduled Time	Submission Time
Rebuild Learning Item Stop Word Index	2177140	Succeeded	5/17/23 6:40 AM EDT	5/17/23 6:40 AM EDT
Rebuild Learning Item Stop Word Index	2177139	Succeeded	5/17/23 6:40 AM EDT	5/17/23 6:40 AM EDT
AutoPost Journals	2177138	Succeeded	5/17/23 6:40 AM EDT	5/17/23 6:40 AM EDT
Perform Object Sharing Rule Assignment Processing	2177137	Wait	5/17/23 7:39 AM EDT	5/17/23 6:40 AM EDT
Perform Object Sharing Rule Assignment Processing	2177136	Wait	5/17/23 7:39 AM EDT	5/17/23 6:39 AM EDT

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

Name	Process ID	Status	Scheduled Time	Submission Time
Rebuild Learning Item Stop Word Index	2177140	Succeeded	5/17/23 6:40 AM EDT	5/17/23 6:40 AM EDT
Rebuild Learning Item Stop Word Index	2177139	Succeeded	5/17/23 6:40 AM EDT	5/17/23 6:40 AM EDT
AutoPost Journals	2177138	Succeeded	5/17/23 6:40 AM EDT	5/17/23 6:40 AM EDT
Perform Object Sharing Rule Assignment Processing	2177137	Wait	5/17/23 7:39 AM EDT	5/17/23 6:40 AM EDT
Perform Object Sharing Rule Assignment Processing	2177136	Wait	5/17/23 7:39 AM EDT	5/17/23 6:39 AM EDT

Process Details | Status Details

AutoPost Journals, 2177138

Status: Succeeded | Schedule Start: 5/17/23 6:40 AM EDT

Log and Output

Attachment ESS_O_2177138 (1 more...)

Parameters

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

View: Flat List | Hierarchy

Actions: Schedule New Process, Resubmit, Put On Hold, Cancel Process, Release Process, View Log

Attachments

Type	Category	* File Name or URL	Title	Description	Attached By
File	Enterprise Sch	2177138.txt	ESS_O_2177138	ESS Job Request Process	Training Supe
File	Enterprise Sch	2177138.log	ESS_L_2177138	ESS Job Request Process	Training Supe

Rows Selected: 1

OK | Cancel

2177138 (1).txt

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

```

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.
    
```

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