

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).

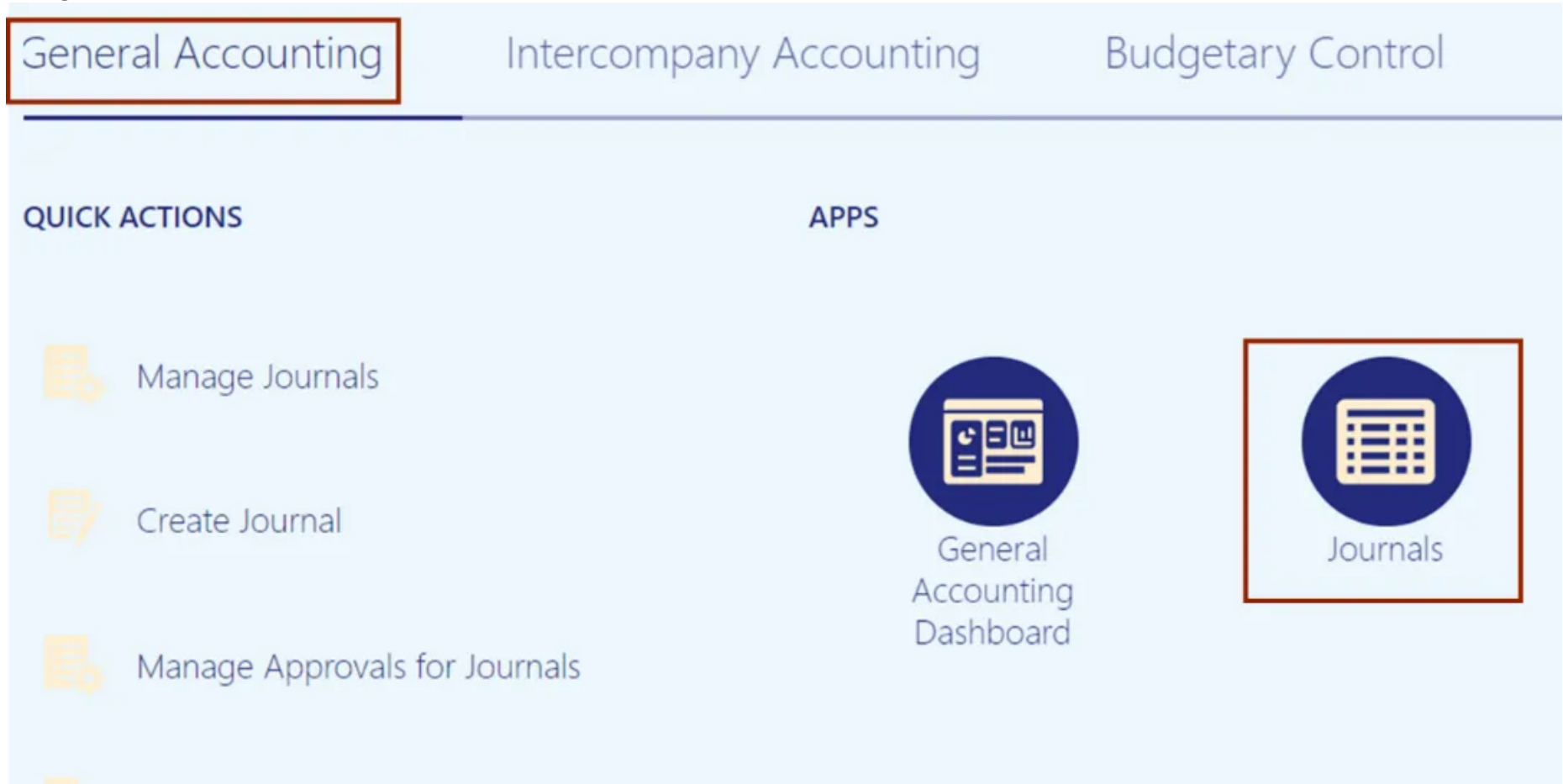
Run Auto Post through Journals Page

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

Data Access Set: NC CASH US [\[Change\]](#)

 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...

Schedule As soon as possible

☐ Notify me when this process ends

Submission Notes

Basic Options

Parameters

* AutoPost Criteria Set

NC Agy Fin Interface Criteria

NC Agy Fin Interface Criteria

NC Agy Journal Criteria Set

NC Dep Criteria Set

NC IBIS Criteria Set

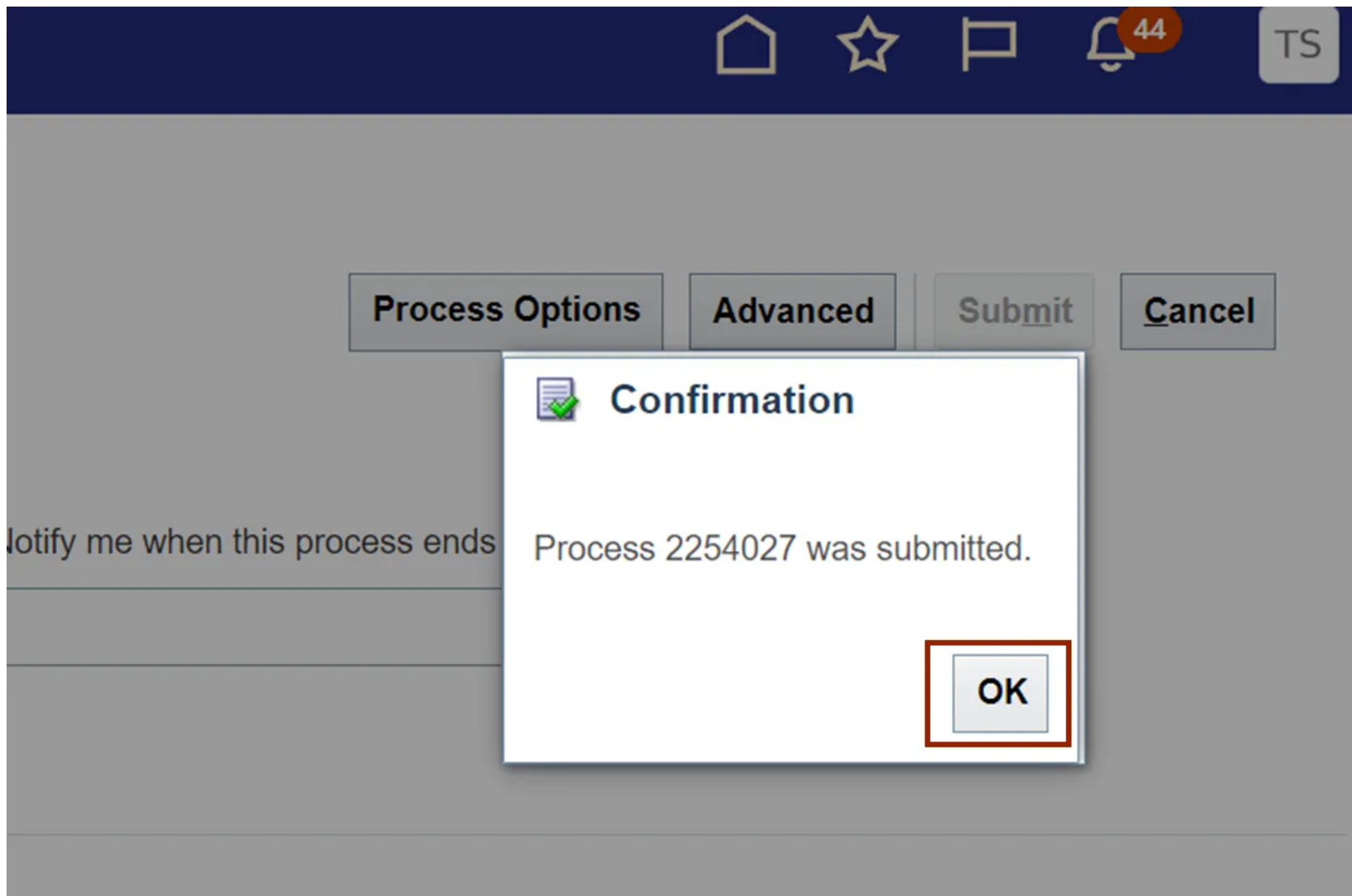
NC Req & Other Criteria Set

NC Req Interface Criteria Set

NC STIF & COPS Criteria Set

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

Image



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

Data Access Set: NC CASH US [\[Change\]](#)

Journals

Journals

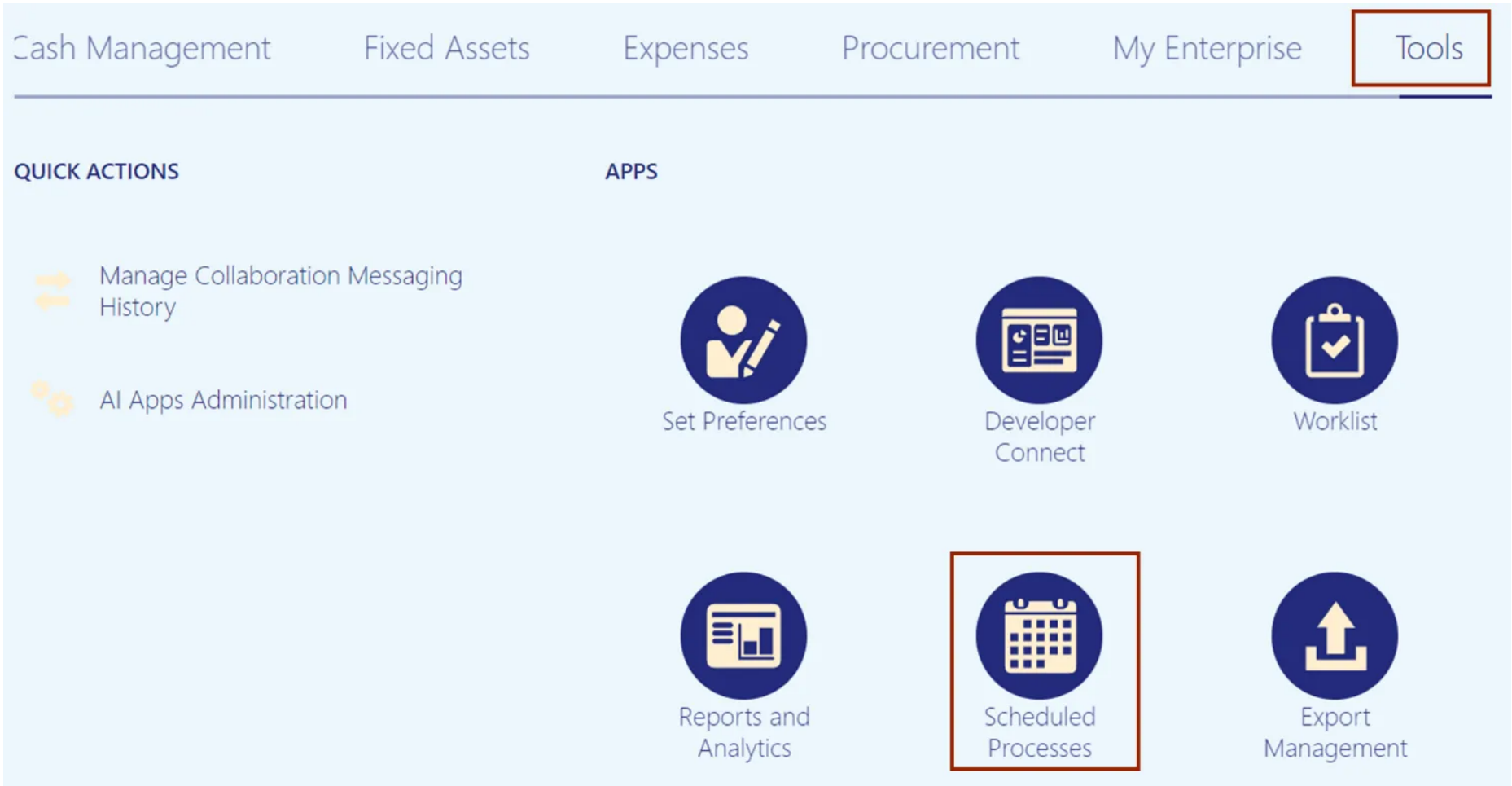
[Requiring Attention](#) [Incomplete](#) [Import Errors](#)

View ▼ Format ▼ Freeze Detach Wrap ↺

Accounted		Source	Journal Batch	Accounting Period	Issue	Error Date
Debit	Credit					
113,000.00	113,000.00	Payables	Payables A 2234808000001 22348...	Mar-23	Budgetary control failed f...	6/16/23
65,258.60	65,258.60	Spreadsheet	4800 Dep 10/17/22 FreedomPay2 ...	Oct-22	Rejected	10/19/22

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.

Image

Overview ?



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
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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

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

Saved Search

Last hour ▼

Search

Reset

Download Results

Search Results ?

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

Image

Overview ?

► Search Saved Search Last hour ▼

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

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

Image

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

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

Image

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
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[Process Details](#) [Status Details](#)

AutoPost Journals, 2177138

Status SucceededSchedule Start 5/17/23 6:40 AM EDT

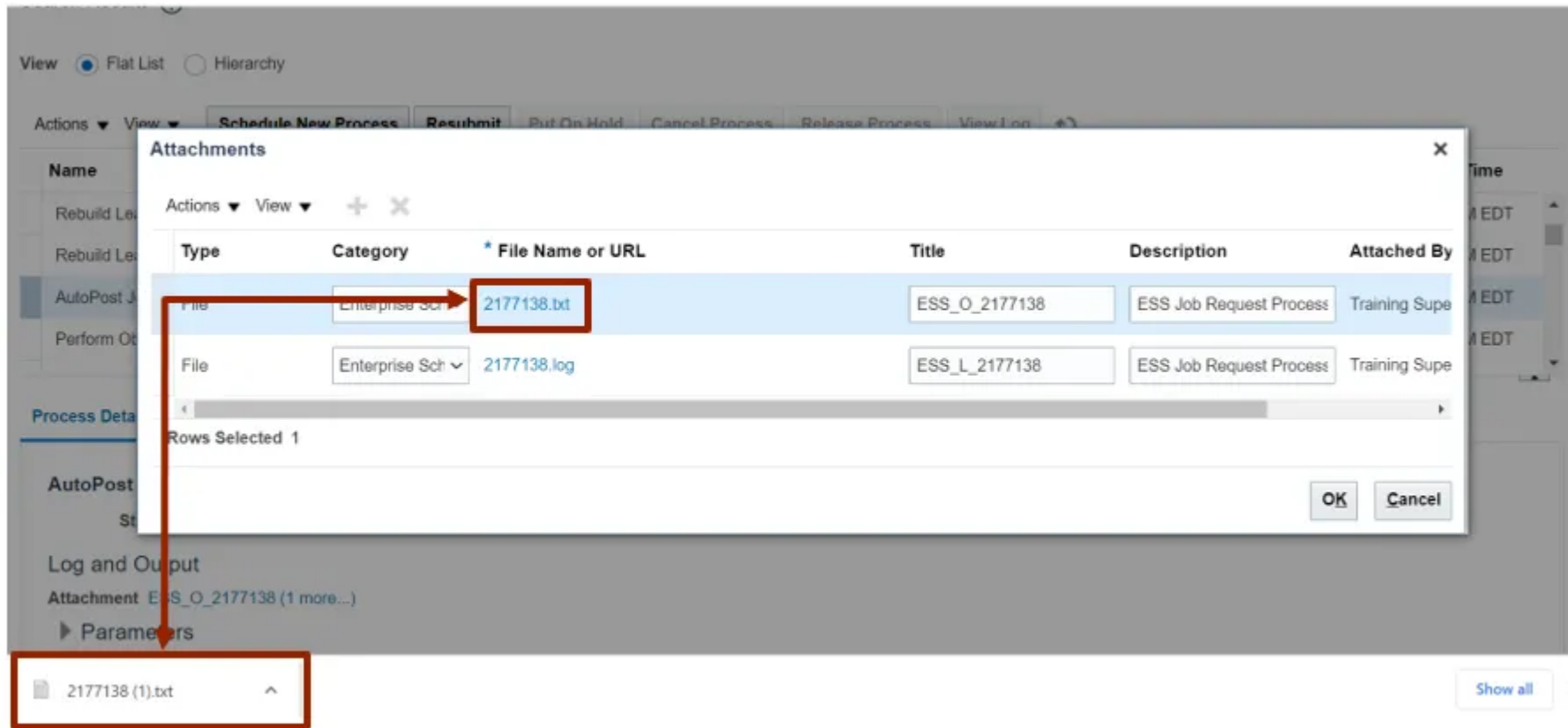
Log and Output

Attachment [ESS_O_2177138 \(1 more...\)](#)

Parameters

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

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.

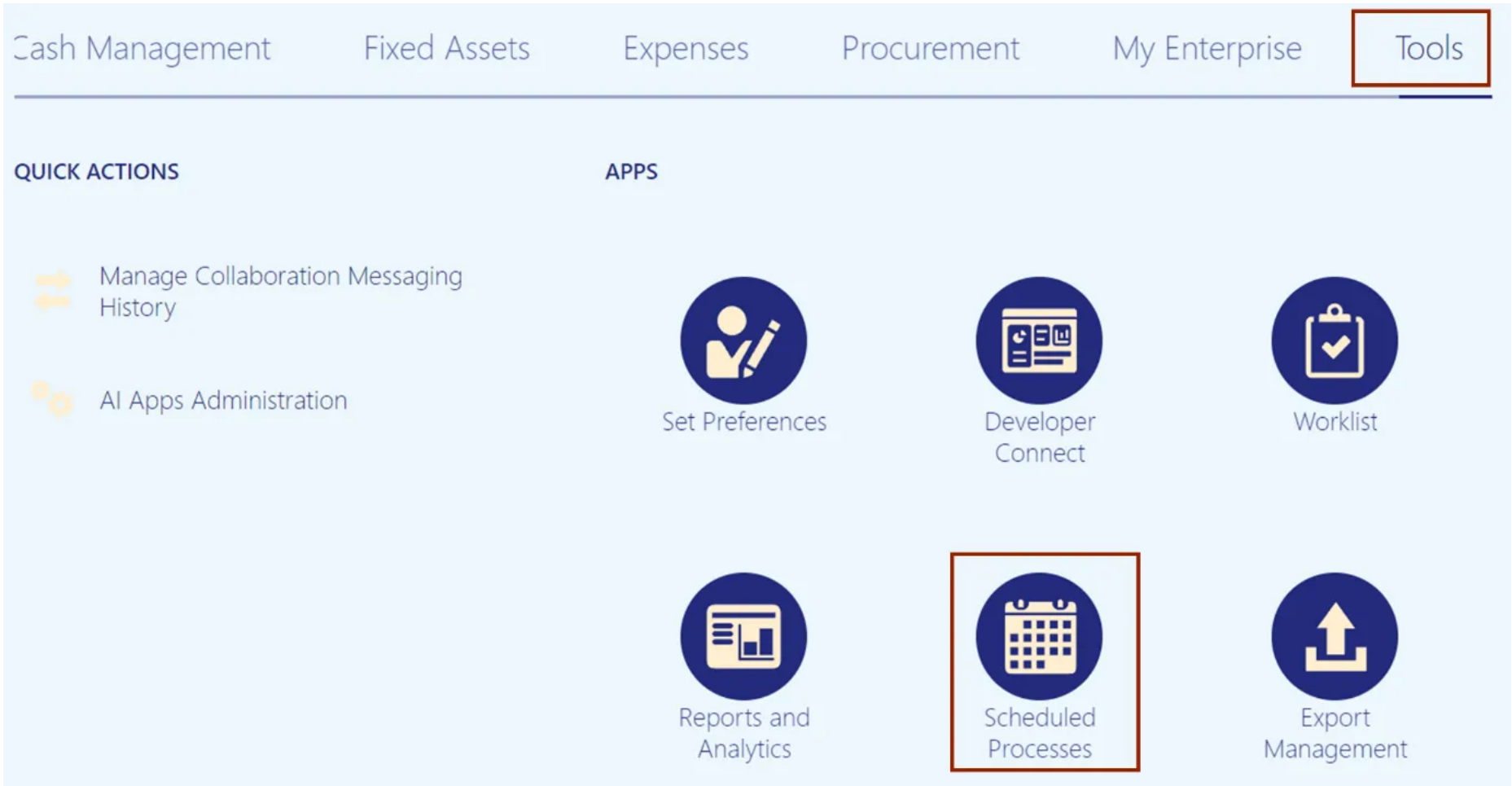
Run Auto Post through Scheduled Processes

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

Overview ?

► Search Saved Search Last hour ▼

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
No data to display.				

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

Schedule New Process

Type ☒ Job ☐ Job Set

Name AutoPost Journals

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

OK Cancel

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

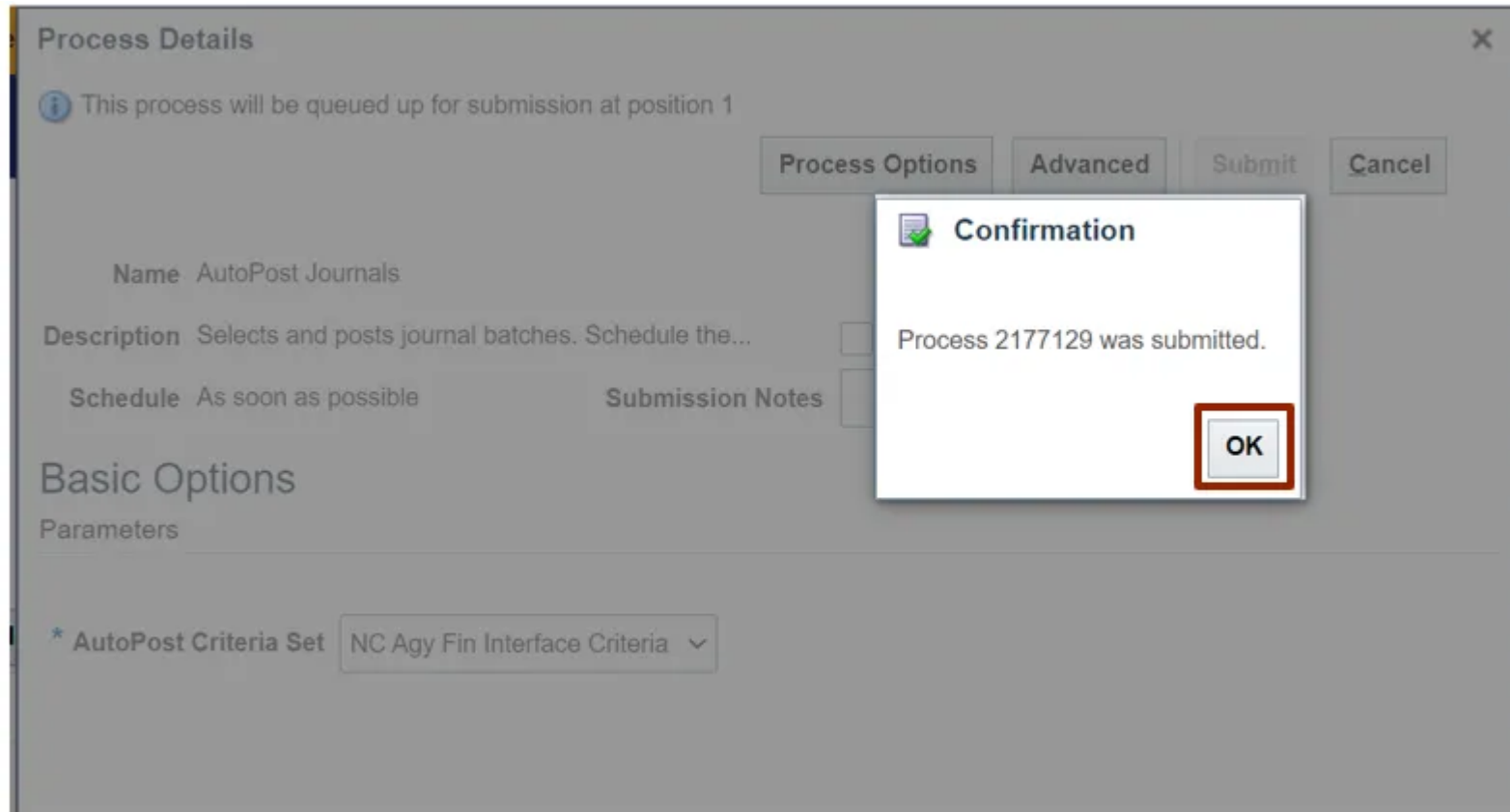
* AutoPost Criteria Set NC Agy Fin Interface Criteria ▾

* AutoPost Criteria Set

- NC Agy Fin Interface Criteria ▾
- 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

Step 6. The *Confirmation* pop-up page is displayed with the **Process ID** number. Click the **OK** button.

Image



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

Image

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

Image

Overview ?

Search

Saved SearchLast hour

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
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Perform Object Sharing Rule Assignment Processing	2177136	Wait	5/17/23 7:39 AM EDT	5/17/23 6:39 AM EDT

Step 9. At the bottom of the **Overview** page, navigate to the **Process Details** section and click the **Attachment** link.

Image

Name	Process ID	Status	Scheduled Time	Submission Time
Rebuild Learning Item Stop Word Index	2177130	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

Step 10. On the *Attachments* pop-up page two outputs will be displayed. Click on the .txt ***File Name or URL** to download the output.

Image

The screenshot shows the 'Attachments' pop-up window with the following data:

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

Rows Selected: 1

Buttons: OK, Cancel

In the background window, the attachment 'Attachment ESS_O_2177138 (1 more...)' is highlighted, and its corresponding file '2177138 (1).txt' is visible in the list at the bottom.

Step 11. 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.		

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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