Creating Group Post

After getting access to create group post you will start by going to KSU Group Processing. Choose Add a New Value.

Click on the Add button.

New Charge Created

The Group Type is a dropdown menu. To create a group to post charges to student accounts you will use New Charge Created from that menu.

Origin ID is then selected and you will use the 5-digit ID assigned to your department. An example is 00040 – Operations Admin.

Next are the Control Totals – Balance the Group should be checked the dollar amount of your group if you have it should be entered along with the Control Count.

Go to the tab Group Line Entry – here is where you enter the information to be posted to the student's account. Please not the Group ID is "NEXT". If you do have the student's EMPLID (number starting with 000xxxxxx) this is needed to post. Click on the magnifying glass and you can search by the University's 9-digit WID or by Last Name and First Name.

The Account Type is associated with the Item Types. Example – MSC – miscellaneous charges for departments that begin with 3xxxxxxxxxxx and are 12 digits long. Click on the magnifying glass to see a list of all Account Type individuals would have access to.

Item Types are setup for specific charges. Example shown below is for Misc. Debt Repayment used by the Cashier's Office only.

Amount is a positive is to debit a student account and a negative is to credit an account. Adjustment Item Types (790000000000) are shown as a positive when using Group Post but when posted to the student account are a credit.

Term – if left blank with post to the default term. When crediting a charge in a previous term you will need to put the Term that the original charge to be credited is in.

Reference Number – when posting a charge or adjustment you can leave it blank or put something in it for a specific item. When reversing an original charge that has something in the Ref Nbr field, the reversal will need to have the exact same wording as the original.

Click SAVE in the lower left corner.

You will see that after clicking save the Group ID is filled in. When looking up using the Group ID all you need are the last 5 digits.

This shows the Line Entry after it is posted.

KSU Group Processing

Business Unit KSUNV   **Group ID** 000000000081496

Group Line Details

Find | View All   First ◄ 1 of 1 ► Last

Group Line Number 1

ID 000305854   Stroot,Aaron M

Balance 500.00   Academic Information

Account Type MSC   Miscellaneous Charges   **Item Effective Date** 01/16/2020

Item Type 300000000050   Misc. Debt Repayment   **Due Date**

Item Amount 500.00   **Currency Code** USD   Currency Detail

Term 2202   S2020

Reference Number LOAN REPAYMENT   Application Information

Payment Information

Payment ID   Payment Details   Tender Details   ☐ Use Excess Account

Payment Method ▼   **Excess Account**

Charge Priority   **Service Indicator**

☐ Restrict Payment to Account

Errors

Posted Date 01/16/2020

[Save] [Return to Search] [Previous in List] [Next in List] [Notify]   [Add] [Update/Display]

Always make sure the Control Totals are completed and equal and that Balance the Group is check marked.

Your group will have Posting Action as – Available for Posting and once it is posted with no errors the action will say Posted.

Below shows the group is ready to be posted.

Group Entry | Group Line Entry

Business Unit KSUNV   Group ID 000000000081497

*Group Type Reversal: No New Charge ▼   *Accounting Date 01/16/2020 📅
*Origin ID 00040 🔍   Oper Adm   *Received 01/16/2020 📅
Original Group ID [   ] 🔍   *Entry Date 01/16/2020 📅
☐ Create New Charge Item   Operator JANM
                                   Assign To

Control Totals

☑ Balance the Group
Control Total   -500.00 USD   Control Count   1
Entered Total   -500.00   Entered Count   1
Difference   0.00   Difference Count   0
Posted Total   -500.00   Posted Count   1
Posted Date 01/16/2020

Display Option

Range in DB   1   to   1
Display   1   to   1
Total in DB   1 |◄ ◄◄ ►► ►|

Process Instance [   ]

Effective Status

Edit Status Edited   Deposit Balance Balanced
*Posting Action Posted ▼   Posting Status Balance

💾 Save | 🔍 Return to Search | ↑ Previous in List | ↓ Next in List | 📄 Notify   ➕ Add | 📝 Update/Display

This page shows that you can search for a group by the Entry Date, Group ID (last 5 digits) or Origin ID.

Group Data Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

▼ Search Criteria

Business Unit = ▼ [KSUNV] 🔍
Group ID begins with ▼ [   ]
User ID begins with ▼ [   ] 🔍
Group Type begins with ▼ [   ] 🔍
Origin ID begins with ▼ [   ] 🔍
Posting Status = ▼ [▼]
Entry Date = ▼ [01/16/2020] 📅
Posted Date = ▼ [   ] 📅
Operator ID Approval begins with ▼ [   ] 🔍

☐ Case Sensitive
Limit the number of results to (up to 500): [300]

Search | Clear | Basic Search | 💾 Save Search Criteria

Search Results

View All   First ◄ 1-2 of 2 ► Last

Business Unit	Group ID	User ID	Group Type	Group Type Description	Origin ID	Origin Description	Posting Status	Entry Date	Posted Date	Operator ID Approval
KSUNV	000000000081497	JANM	M	Reversal: No New Charge	00040	Operations Admin	Balance	01/16/2020	01/16/2020	(blank)
KSUNV	000000000081496	JANM	N	New Charge Created	00040	Operations Admin	Balance	01/16/2020	01/16/2020	(blank)

Find an Existing Value | Add a New Value