Entering/Modifying and Posting Charges for Multiple Students

Use this instruction guide to learn how to post multiple transactions for multiple students. To complete this task, you must attend PST310 Student Financials and have the security roles:

- UF_SF_UPDATE_CHARGES – Permits entering and modifying charges
- UF_SF_PP_XXXXXXX - Defines your scope of authority where XXXXXXX = your department/unit

1. Login to myUFL
   - Click the Login button
   - Open an internet browser
   - Navigate to my.ufl.edu
   - Click the Access myUFL button
   - Enter your GatorLink username and password
   - Click the Login button

2. Navigate to Student Financials > Charges and Payments > Created Group Data Entries
3. Click the Add a New Value link
   - The system adds the NEXT value
   - After you save the Group Data Entry page, NEXT will be changed to system generated a Group ID number
4. Click the Add button

GROUP ENTRY PAGE

Use the Group Entry page to define source information and control totals for group transactions

5. From the Group Type drop down menu, select Charge
6. Click in the Origin ID field and enter your units ID or click the look-up button to search for it
7. Leave the Original Group ID field blank, unless this group is being altered after the original group was created
8. Make no changes to the Accounting Date
9. Make no changes to the Received field
10. Make no changes to the Entry Date
11. Select the Balance Group check box to require the group be in balance before the system posts it
   - To determine whether a group is balanced, the system compares the number of transactions and amounts to information in the control totals fields
12. Enter the monetary sum of the transactions in the Control Total field
13. If you are modifying a charge, enter the adjusting amount
14. In the unlabeled field to the right, enter the total number of transactions
   - For example, if you are entering a group of checks that were received from students, enter the total monetary value of the checks in the Control Total field and the number of checks (count) in the unlabeled field
   - If the external file load process is used, and the external file setup defines control totals, these fields are populated through the file load process
15. The Entered Total field displays the monetary amount of all transactions that are entered in the batch and the count of the entries
16. The Difference field displays the difference between the entered totals and the control totals
17. The Posted Total field displays the monetary total, posting date and count of the entries after the batch is posted

GROUP LINE ENTRY PAGE

Next, you will use the Group Line Entry page to add the students that have housing charges.

18. Click the Group Line Entry tab
   - Use the Group Line Entry page to add the students and their housing charges
19. Enter the Student's UFID in the **ID** field
20. Enter the Account Type in the **Account Type** field
21. Enter the Item Type in the **Item Type** field
22. Click in the **Amount** field and enter the desired information into the **Amount** field
23. **If you are modifying a charge**, enter the adjusting amount
24. Enter the academic term in the **Term** field
   - The first digit is the century (1 = 20th century; 2 = 21st century)
   - The second & third digits are the last digits of the calendar year (08 = 2008; 15 = 2015)
   - The fourth digit is the semester and the Registrar codes the semester based on the month the semester begins (1-January = Spring; 5-May = Summer; 8-August = Fall)
25. Enter the **Item Effective Date** on which the transaction becomes active
26. Enter or select the desired date in the **Due Date** field
27. The due date can be changed to further in the future, but cannot be any sooner than 30 days

**Add additional students**
28. Click the **Add Row** button
29. Enter the next Student's UFID into the **ID** field
30. The remaining fields will populate based on the first student you entered
31. Make changes as needed
   - Repeat these steps to add as many students as necessary

**Verify the group is balanced**
32. Click the **Group Entry** tab
33. Click the **Save** button

Notice after you saved, the system assigned a Group ID number. You will need this number to post the transactions.

Note the following on the Group Entry page
- The **Control Totals** group box displays the entered totals
- Notice the **Difference** fields are zero -- the transactions were entered properly
- The **Display Option** group box displays the range and totals in the database
- The **Effective Status** group box displays the status of these charges
- The charges are **Available for Posting**

**POSTING TRANSACTIONS**
Next, you will post the transaction(s)
34. Click the **Post Transactions** link
35. Enter your **Run Control ID** - You can run this process by searching for an existing Run Control ID or you can add a new value
   - **If you do not have one, you can create one:**
     - Click the Add a New Value tab
     - Enter the desired information into the Run Control ID field
     - Enter an ID that is relevant to the process. This may help you remember it for future use
     - For example, enter "MYDEPARTMENT_postcharges"
     - Click the Add button

Use the **Post Transactions** page to run the Group Post process
36. In the **Group Type** field, enter C or click the look up button and select **Charge**
37. Click in the Starting Group ID field and enter the Group ID the system created after you saved your Group Entry charges
   - There are 15 digits in the Group ID number
   - Click the lookup button to view a list. Note you can search by UFID
   - Use the Find a Group ID instruction guide if you need to identify with Group ID to enter
38. Click in the Ending Group ID field and enter the ending group ID
39. You are going to post both groups of charges at one time. The system inserts the starting ID as the ending ID, but you want to enter a different Ending Group ID number
40. Click the Run button to access the Process Scheduler Request page
41. Click the checkbox next to Group Posting Process (SFPGRPST) to select it
42. Click the OK button

**Review the transaction**
43. Click the Review Transactions link
44. Enter the appropriate ID into the Group ID field
45. Click the Search button

Use the Review Transactions page to review group entry information after posting
Notice the Posted Total is $3,000.00
46. Click the Group Post Details link
47. Use the Group Post Details page to review more detail about the group you posted
48. You can see that there is no Difference and that the Posted Total is accurate
49. You can click the Return link to go back to the Review Transactions page

**For Further Assistance**
- Review the myUFL Toolkit for Student Financials at the Human Resource Services website
  - Navigate to hr.ufl.edu and select: Training > myUFL Toolkits > Student Financials
  - Click here: http://www.hr.ufl.edu/training/myUFL/toolkits/StudentFinancials.asp
- Contact the UF Help Desk at helpdesk@ufl.edu or call them at (352)392-HELP