9.2 FSCM Security - Process Groups

Purpose: Use this document as a reference for how to assign Process Groups to users in User Preferences. Process Groups can be selectively enabled for a specific user to set controls for the on-demand features on transaction pages accessible with their assigned roles.

Audience: Finance and Security staff

❗• Only Local Security Administrators have access to update these via the ZZ Local Security Admin role and view them with the ZD Local Security Admin role

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Assigning Process Groups in User Preferences

On-demand Process Groups allow users to run processes directly from Accounts Payable and Accounts Receivable transaction entry pages. The Process Groups generally consist of logically-related and sequentially-ordered processes that a transaction might require

It is recommended to establish each user with the specific access associated with their job duties and is not recommended to simply copy one user's access to another user as this could lead to overallocation of access. However, there are situations where a group of staff within a single department all require the same access to perform similar work. In that case, the COPY function provides the ability to apply all Process Group definitions from one user to another without having to search and enter each Source Transaction and Process Group combination.

Local security administrators need to assess the users access needs individually. Some newer, and more inexperienced users may not need process groups, that would allow them to process transactions outside of batch processing. These newer users are probably limited to more of data entry type access and their transactions would be picked up when the batch processes ran, instead of running those directly on each transaction. It is important from an audit perspective to only allow transactional processing to the users that require that level of access and understand the impacts of those processes.

Navigation: NavBar > Navigator > Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences

On the **Process Group** page, ensure the following boxes are checked:

- **Allow Processing:** This controls if on-demand processing is enabled, then the user will be able to run certain batch processes from the transaction screens. For example, a user can execute batch processes such as Voucher Post, Journal Generator, and so on from the voucher entry page itself rather than navigating to a different page to run that particular process.
- **Use Event Notification:** Check the box to allow the ability to use Event Notification.

Source Transaction: indicates a specific system feature from the Receivable or Payable module. For example, the VOUCHER source transaction controls the processing options for the voucher entry function in Payable, while ARPAYWS controls the actions that a user can perform for Payment worksheets in the Receivable module.

In the **Source Transaction** section, click the Look Up (spy glass) icon and select the Source Transaction, for example: **VOUCHER**-**Voucher Entry**.

Process Group: indicates what level of privileges is granted to a user for a selected source transaction. For example, the following options (Process Groups) are related to payment worksheets: ARACTIONA (Do not post), ARACTIONL (Batch standard), ARACTIONN (Batch priority), ARPOST (Post now), ARPOSTGL (Post now through to GL). If the user needs to be able to post the payment worksheets to GL, then selecting the value ARPOSTGL in the Process Group field will provide the needed access.

In the **Process Group** section, click the Look Up (spy glass) icon and select the following values, clicking the Plus (+) symbol between each entry to open a new row. For example for the Source Transaction **VOUCHER - Voucher Entry** the following values are listed:
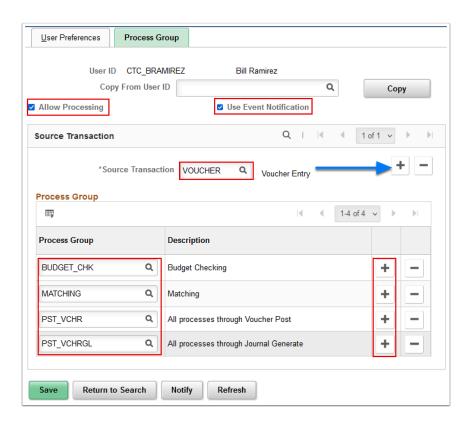
> **BUDGET_CHK**- Budget Checking
>
> **MATCHING**- Matching
>
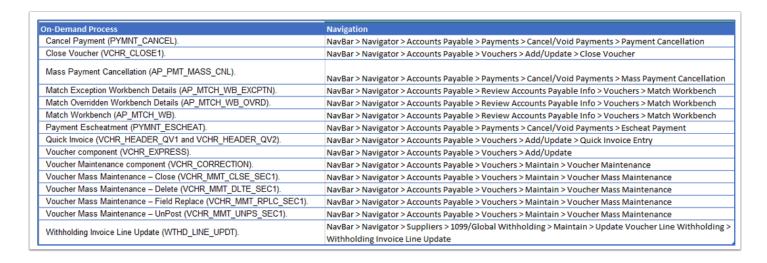> **PST_VCHR**- All processes through Voucher Post
>
> **PST_VCHRGL**- All processes through Journal Generate

Click the Plus (+) symbol by the **Source Transaction** field (see blue arrow) to open a new Source Transaction block.

Accounts Payable

Accounts Payable transactions can be processed in a batch, or you can process it on demand on the following pages:

On-Demand Process	Navigation
Cancel Payment (PYMNT_CANCEL).	NavBar > Navigator > Accounts Payable > Payments > Cancel/Void Payments > Payment Cancellation
Close Voucher (VCHR_CLOSE1).	NavBar > Navigator > Accounts Payable > Vouchers > Add/Update > Close Voucher
Mass Payment Cancellation (AP_PMT_MASS_CNL).	NavBar > Navigator > Accounts Payable > Payments > Cancel/Void Payments > Mass Payment Cancellation
Match Exception Workbench Details (AP_MTCH_WB_EXCPTN).	NavBar > Navigator > Accounts Payable > Review Accounts Payable Info > Vouchers > Match Workbench
Match Overridden Workbench Details (AP_MTCH_WB_OVRD).	NavBar > Navigator > Accounts Payable > Review Accounts Payable Info > Vouchers > Match Workbench
Match Workbench (AP_MTCH_WB).	NavBar > Navigator > Accounts Payable > Review Accounts Payable Info > Vouchers > Match Workbench
Payment Escheatment (PYMNT_ESCHEAT).	NavBar > Navigator > Accounts Payable > Payments > Cancel/Void Payments > Escheat Payment
Quick Invoice (VCHR_HEADER_QV1 and VCHR_HEADER_QV2).	NavBar > Navigator > Accounts Payable > Vouchers > Add/Update > Quick Invoice Entry
Voucher component (VCHR_EXPRESS).	NavBar > Navigator > Accounts Payable > Vouchers > Add/Update
Voucher Maintenance component (VCHR_CORRECTION).	NavBar > Navigator > Accounts Payable > Vouchers > Maintain > Voucher Maintenance
Voucher Mass Maintenance – Close (VCHR_MMT_CLSE_SEC1).	NavBar > Navigator > Accounts Payable > Vouchers > Maintain > Voucher Mass Maintenance
Voucher Mass Maintenance – Delete (VCHR_MMT_DLTE_SEC1).	NavBar > Navigator > Accounts Payable > Vouchers > Maintain > Voucher Mass Maintenance
Voucher Mass Maintenance – Field Replace (VCHR_MMT_RPLC_SEC1).	NavBar > Navigator > Accounts Payable > Vouchers > Maintain > Voucher Mass Maintenance
Voucher Mass Maintenance – UnPost (VCHR_MMT_UNPS_SEC1).	NavBar > Navigator > Accounts Payable > Vouchers > Maintain > Voucher Mass Maintenance
Withholding Invoice Line Update (WTHD_LINE_UPDT).	NavBar > Navigator > Suppliers > 1099/Global Withholding > Maintain > Update Voucher Line Withholding > Withholding Invoice Line Update

Accounts Receivable

In PeopleSoft Receivables a process group is not associated with a process; it is associated with a posting action. The posting action that is associated with a process group determines which processes to run, and when to run those processes.

Available Process Groups

Available Process Groups		9.2 FSCM Security - Process Groups QRG link:	https://ctclinkreferencecenter.ctclink.us/m/56084/l/1603308-9-2-fscm-security-process-groups	
This table shows the process groups, their associated processes and posting actions, and the products that use them:				

Source Transaction	Source Description	Process Groups Available by Source Transaction	Process Group Definition	Related Roles	Related QRG
APMASSCNL	Mass Payment Cancellation v1	APPMTCNL1	Allows the user to perform a Payment Mass Cancellation.	ZZ Payment Processing	QRG for Mass Payment Cancellat not foun
		APPMTCNL2	Allows the user to perform a Payment Mass Cancellation and run Payment Post.		
APMASSCNL2	Mass Payment Cancellation v2	APPMTCNL1	Allows the user to perform a Payment Mass Cancellation.		
		APPMTCNL2	Allows the user to perform a Payment Mass Cancellation and run Payment Post		
		APPMTCNL2A	Allows the user to perform a Payment Mass Cancellation, run Payment Post, and Voucher Post.		
ARCASHCTL	Receivables	ARPOSTGL	Allows the user to	*Colleges may	9.2

	Cash Control		run the Receivable Update job immediately and post the GL	request adhoc runs of Receivables Update using Service Desk Ticket	Processir Receivab Update
ARCASHCTL					
ARDIRJRNL	Direct Journal Processing	ARACTIONA	Allows the user to change the posting status to Do Not Post so that the group is not processed by a scheduled run of the Receivable Update.	Allows changes to the posting status.	
		ARACTIONL	Allows the user to change the posting status to Batch Standard so that the group is processed by a scheduled run of the Receivable Update		
		ARACTIONN	Allows the user to change the posting status to Batch Priority so that the group is processed by the next Priority or Scheduled Receivable Update		
		ARPOST	Allows the user to run the Receivable Update job immediately.		
		ARPOSTGL	Allows the user to run the Receivable Update job immediately and post the GL		
AREPAYWS	EPayment Worksheet	ARACTIONA	Allows the user to change the posting	Allows changes to the posting	

			status to Do Not Post so that the group is not processed by a scheduled run of the Receivable Update.	status.	
		ARACTIONL	Allows the user to change the posting status to Batch Standard so that the group is processed by a scheduled run of the Receivable Update		
		ARACTIONN	Allows the user to change the posting status to Batch Priority so that the group is processed by the next Priority or Scheduled Receivable Update		
		ARPOST	Allows the user to run the Receivable Update job immediately.		
		ARPOSTGL	Allows the user to run the Receivable Update job immediately and post the GL		
ARITSPLT	Item Split	ARACTIONA	Allows the user to change the posting status to Do Not Post so that the group is not processed by a scheduled run of the Receivable Update.	Allows changes to the posting status.	
		ARACTIONL	Allows the user to change the posting status to Batch	ZZ AR Customer Maintenance	

			Standard so that the group is processed by a scheduled run of the Receivable Update		
		ARPOST	Allows the user to run the Receivable Update job immediately.		
ARMNTWS	Maintain Receivables Worksheet	ARACTIONA	Allows the user to change the posting status to Do Not Post so that the group is not processed by a scheduled run of the Receivable Update.	Allows changes to the posting status.	
		ARACTIONL	Allows the user to change the posting status to Batch Standard so that the group is processed by a scheduled run of the Receivable Update	ZZ AR Apply Payments	
		ARACTIONN	Allows the user to change the posting status to Batch Priority so that the group is processed by the next Priority or Scheduled Receivable Update	ZZ AR Item Entry	
		ARPOST	Allows the user to run the Receivable Update job immediately.		
		ARPOSTGL	Allows the user to run the Receivable Update job immediately and post the GL		

AROPIE	Online Pending Item Entry	ARACTIONA	Allows the user to change the posting status to Do Not Post so that the group is not processed by a scheduled run of the Receivable Update.	Allows changes to the posting status.	
		ARACTIONL	Allows the user to change the posting status to Batch Standard so that the group is processed by a scheduled run of the Receivable Update	ZZ AR Apply Payments	
		ARACTIONN	Allows the user to change the posting status to Batch Priority so that the group is processed by the next Priority or Scheduled Receivable Update	ZZ AR Item Entry	
		ARPOST	Allows the user to run the Receivable Update job immediately.		
		ARPOSTGL	Allows the user to run the Receivable Update job immediately and post the GL		
ARPARUPOST	Partial Payment Unpost	ARACTIONA	Allows the user to change the posting status to Do Not Post so that the group is not processed by a scheduled run of the Receivable Update.	Allows changes to the posting status.	
		ARACTIONL	Allows the user to	ZZ AR Apply	

			change the posting status to Batch Standard so that the group is processed by a scheduled run of the Receivable Update	Payments	
		ARACTIONN	Allows the user to change the posting status to Batch Priority so that the group is processed by the next Priority or Scheduled Receivable Update		
ARPAYWS	Payment Worksheet	ARACTIONA	Allows the user to change the posting status to Do Not Post so that the group is not processed by a scheduled run of the Receivable Update.	Allows changes to the posting status.	
		ARACTIONL	Allows the user to change the posting status to Batch Standard so that the group is processed by a scheduled run of the Receivable Update	ZZ AR Apply Payments	
		ARACTIONN	Allows the user to change the posting status to Batch Priority so that the group is processed by the next Priority or Scheduled Receivable Update	ZZ AR Item Entry	
		ARPOST	Allows the user to run the Receivable Update job immediately.		

		ARPOSTGL	Allows the user to run the Receivable Update job immediately and post the GL		
ARTRNWS	Transfer Worksheet	ARACTIONA	Allows the user to change the posting status to Do Not Post so that the group is not processed by a scheduled run of the Receivable Update.	Allows changes to the posting status.	
		ARACTIONL	Allows the user to change the posting status to Batch Standard so that the group is processed by a scheduled run of the Receivable Update	ZZ AR Item Entry	
		ARACTIONN	Allows the user to change the posting status to Batch Priority so that the group is processed by the next Priority or Scheduled Receivable Update		
		ARPOST	Allows the user to run the Receivable Update job immediately.		
		ARPOSTGL	Allows the user to run the Receivable Update job immediately and post the GL		
ARUNPOST	Unpost Groups	ARACTIONA	Allows the user to change the posting status to Do Not Post so that the	Allows changes to the posting status.	

			group is not processed by a scheduled run of the Receivable Update.		
		ARACTIONL	Allows the user to change the posting status to Batch Standard so that the group is processed by a scheduled run of the Receivable Update	ZZ AR Apply Payments	
		ARACTIONN	Allows the user to change the posting status to Batch Priority so that the group is processed by the next Priority or Scheduled Receivable Update	ZZ AR Item Entry	
		ARPOST	Allows the user to run the Receivable Update job immediately.		
		ARPOSTGL	Allows the user to run the Receivable Update job immediately and post the GL		
LINEWTHD	Withholding Inv Line Update	WHUPDPST	Allows the user to run the Withhold Post and Update	ZZ 1099 Processing	9.2 Withhol Invoice L Update
		WTHDUPD	Allows the user to run the Withhold Update.		
MTCHEXPN	Match Exception	MATCHING	Allows the user to run Matching	ZZ Voucher Processing	9.2 Match Vouchers Batch
MTCHEXPTN	Match Exception	MATCHING	Allows the user to run Matching		9.2 Unmatch

					an Accou[nts] Payable Voucher
MTCHOVRD	Match Override	MATCHING	Allows the user to run Matching		
PYMNCNCL	Payment Cancellation	PAYPOSTGL	Allows the user to run Payment Post and Journal Generator	ZZ Payment Processing	9.2 Cancellin[g] Payment[s]
		PAYVCHRJG	Allows the user to run Payment Post, Voucher Post and Journal Generator		
		PAYVCHRPST	Allows the user to run the Payment Post and Voucher Post		
		PYCNCLPOST	Allows user to run the Payment Post		
		PYMNTPOST	Allows the user to run the Payment Post		
PYMNESCH	Payment Escheatment	PAYPOSTGL	Allows the user to run Payment Post and Journal Generator	ZZ Payment Processing	9.2 Processin[g] Escheate[d] Payment[s]
		PYMNTPOST	Allows the user to run the Payment Post		
QUICKVCHR	Quick Invoice	QVBUDGCC	Allows the user to run all processes through Budget Check for Quick Vouchers	*AP staff run all processes	9.2 Enter[ing] a Quick Invoice
		QVBUDGDTCC	Allows the user to run all processes through Budget Check for Quick Vouchers	ZZ Voucher Processing	9.2 Performi[ng] Voucher Build

		QVDOCDT	Allows the user to run all processes through Document Tolerances for Quick Vouchers		
		QVDOCDTCC	Allows the user to run all processes through Document Tolerances for Quick Vouchers		
		QVJGEN	Allows the user to run all processes through Journal Generate for Quick Vouchers		
		QVJGENCC	Allows the user to run all processes through Journal Generate for Quick Vouchers		
		QVJGENDT	Allows the user to run all processes through Journal Generate for Quick Vouchers		
		QVJGENDTCC	Allows the user to run all processes through Journal Generate for Quick Vouchers		
		QVMTCH	Allows user to run all processes through Matching for Quick Vouchers		
		QVMTCHCC	Allows user to run all processes through Matching for Quick Vouchers		
		QVMTCHDT	Allows user to run all processes through Voucher Build and		

			Matching DT On CC Off for Quick Vouchers		
		QVMTCHDTCC	Allows user to run all processes through Matching for Quick Vouchers		
		QVPOST	Allows user to run all processes through Voucher Post for Quick Vouchers		
		QVPOSTCC	Allows user to run all processes through Voucher Post for Quick Vouchers		
		QVPOSTDT	Allows user to run all processes through Voucher Post for Quick Vouchers		
		QVPOSTDTCC	Allows user to run all processes through Voucher Post for Quick Vouchers		
		QVVBLD	Allows user to run all processes through Voucher Build for Quick Vouchers		
		QVVBLDCC	Allows user to run all processes through Voucher Build for Quick Vouchers		
		QVVBLDDT	Allows user to run all processes through Voucher Build for Quick Vouchers		
		QVVBLDDTCC	Allows user to run all processes through Voucher Build for Quick Vouchers		

REGISTER	Complete Register Voucher	BCHK_ONLY	Allows user to run Budget Pre-Check from the Online Voucher Page	ZZ Voucher Entry	9.2 Enter Regular Voucher
		BUDGET_CHK	Allows the user to run Budget Check from the Online Voucher Page		
		DOC_TOL	Allows the user to run Document Tolerance from the Online Voucher Page		
		MATCHING	Allows the user to run Matching from the Online Voucher Page		
		MTCH_DT_BC	Allows the user to run Matching, Doc Tolerance and Budget Check all together from the Online Voucher Page		
		POSTAPAM	Allows the user to run all processes through Voucher post, Load AM in one step from the Online Voucher Page		
		POSTAPGLAM	Allows the user to run all processes through Journal Generation and Load AM in one step from the Online Voucher Page		
		PST_VCHR	Allows the user to run Matching, Doc Tol, Budget Check and Voucher Post Process from the Online Voucher page		

		PST_VCHRGL	Allows the user to run Matching, Doc Tol, Budget Check, Voucher Post and Journal Generation from the Online Voucher page		
VCHMASSCLS	Voucher Mass Maintenance Close	MASSMAINT	Allows the user to perform the Voucher Mass Close	ZZ Voucher Entry	QRG for Mass Clo Vouchers not foun
		MASSPOST	Allows the user to perform the Voucher Mass Close and run the Voucher Post process		
		MASSPOSTGL	Allows the user to perform the Voucher Maintenance, Post and Journal Generator		
VCHMASSDEL	Voucher Mass Maintenance Del	MASSMAINT	Allows the user to perform the Voucher Mass Delete	ZZ Voucher Entry	QRG for Voucher Mass Maintena not foun
VCHMASSFLD	Voucher Mass Maintenance Field Update	MASSMAINT	Allows the user to perform the Voucher Mass Field Update	ZZ Voucher Entry	QRG for Voucher Mass Maintena not foun
		MASSMNTVB	Allows the user to perform a Voucher Mass Field Update and Voucher Build process		
VCHMASSUNP	Voucher Mass Manitenance Unpst	MASSMAINT	Allows the user to perform the Voucher Mass Unpost	ZZ Voucher Entry	QRG for Voucher Mass unp not foun
		MASSPOST	Allows the user to		

		PST_VCHR	perform the Voucher Mass Close and run the Voucher Post process		
		MASSPOSTGL	Allows the user to perform the Voucher Maintenance, Post and Journal Generator		
		UNPSTJGEN	Allows the user to run the Voucher Mass Maintenance, Journal Generator, and Voucher UnPost		
VCHRCLOSE	Voucher Close	VCHRPOST	Allows the user to run Voucher Post	ZZ Voucher Processing	9.2 Closir Voucher
		VCHRPOSTGL	Allows the user to run Voucher Post and Journal Generate.		
VCHR_MAINT	Voucher Maintenance	AP_VCHRBLD	Allows the user to run the Voucher Build process.	ZZ Voucher Entry	9.2 Vouch Maintena Page for Correctio
VCHR_STM	Voucher On-Demand Processes	POSTAPAM	Allows the user to run all processes through Voucher post, Load AM in one step from the Online Voucher Page	ZZ Voucher Processing	(various QRGs)
		POSTAPGLAM	Allows the user to run all processes through Journal Generation and Load AM in one step from the Online Voucher Page		
		PST_VCHR	Allows the user to run Matching, Doc Tol, Budget Check		

			and Voucher Post Process from the Online Voucher page		
		PST_VCHRGL	Allows the user to run Matching, Doc Tol, Budget Check, Voucher Post and Journal Generation from the Online Voucher page		
VNDRWTHD	Withholding Supplier Update	WHUPDPST	Allows the user to run the Withhold Post and Update	ZZ 1099 Processing	9.2 Withhol Supplier Update
		WTHDUPD	Allows the user to run the Withhold Update.		
VOUCHER	Voucher Entry	BCHK_ONLY	Allows user to run Budget Pre-Check from the Online Voucher Page	ZZ Voucher Entry	9.2 Enter Regular Voucher
		BUDGET_CHK	Allows the user to run Budget Check from the Online Voucher Page		
		DOC_TOL	Allows the user to run Document Tolerance from the Online Voucher Page		
		MATCHING	Allows the user to run Matching from the Online Voucher Page		
		MTCH_DT_BC	Allows the user to run Matching, Doc Tolerance and Budget Check all together from the Online Voucher Page		
		POSTAPAM	Allows the user to		

			run all processes through Voucher post, Load AM in one step from the Online Voucher Page		
		POSTAPGLAM	Allows the user to run all processes through Journal Generation and Load AM in one step from the Online Voucher Page		
		PST_VCHR	Allows the user to run Matching, Doc Tol, Budget Check and Voucher Post Process from the Online Voucher page		
		PST_VCHRGL	Allows the user to run Matching, Doc Tol, Budget Check, Voucher Post and Journal Generation from the Online Voucher page		