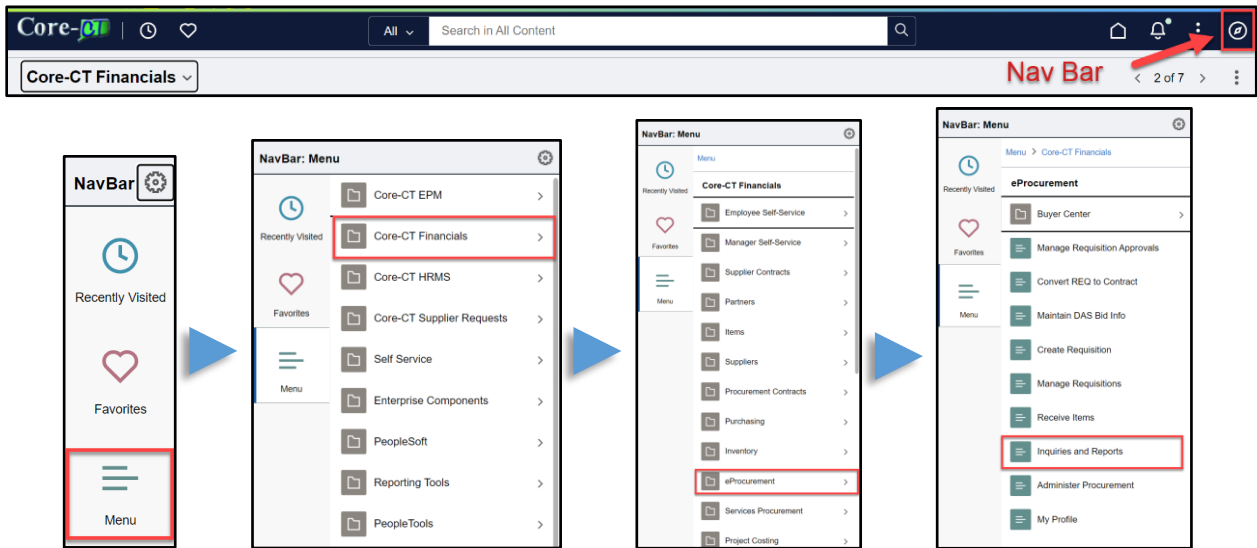




# Scheduling Reports: PSA/POS

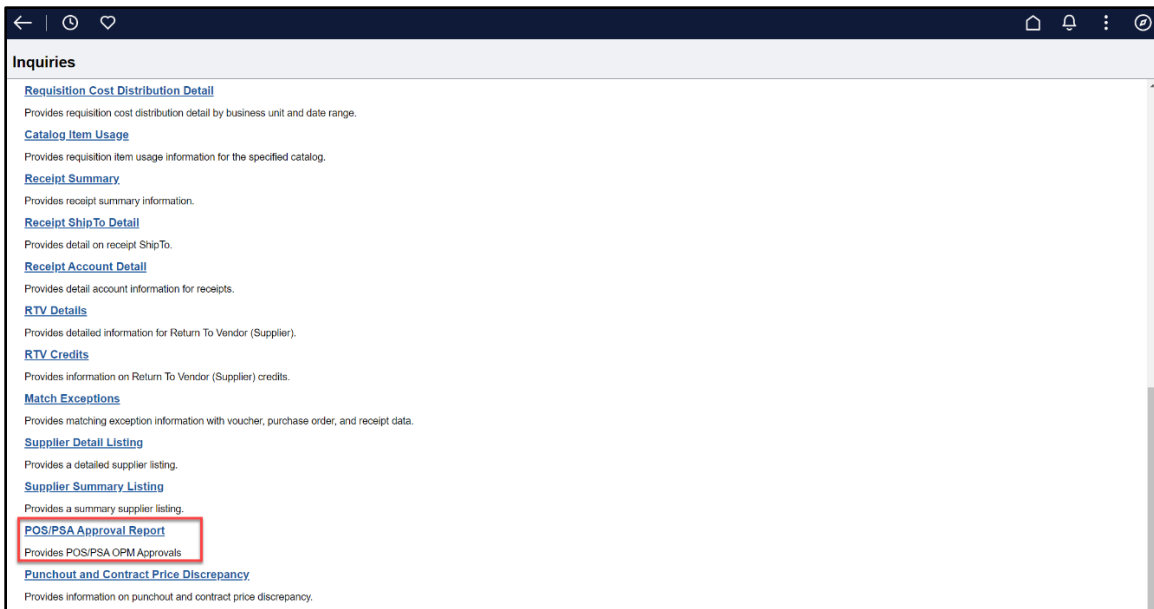
## Navigation:

NavBar > Menu > Core-CT Financials > eProcurement > Inquiries and Reports



## Procedure:

1. Click on POS/PSA Approval Report link





2. Click on **Add a New Value**

The screenshot shows the 'Schedule Query' interface. At the top right, there are links for 'New Window' and 'Help'. The main section is titled 'Find an Existing Value'. A red box highlights the 'Add a New Value' button. Below this, there are search criteria options: 'Recent Searches' and 'Saved Searches'. A search field is present with a dropdown menu set to 'Run Control ID' and a 'begins with' input field. There are 'Search' and 'Clear' buttons at the bottom.

3. Enter a **Run Control ID**

4. Click **Add**

The screenshot shows the 'Schedule Query' interface in the 'Add a New Value' section. A 'Find an Existing Value' button is at the top right. The 'Run Control ID' field contains the text 'OPMAPPROVALS', which is highlighted with a red box. A red arrow points to this field with the text 'Do not leave spaces.' Below the field is an 'Add' button, also highlighted with a red box.

5. Enter **Query Name** (or part of it)

6. Click on **Search**

The screenshot shows the 'Schedule Query' interface. At the top right, there are links for 'New Window', 'Help', and 'Personalize Page'. The 'Run Control ID' field contains 'OPMAPPROVALS'. Below it, the 'Query Name' field contains 'CT\_REQ\_POS\_PSA\_STATUS', which is highlighted with a red box. A 'Search' button is also highlighted with a red box. Other buttons include 'Run', 'Save', 'Add', and 'Update/Display'.



7. Click on the Query Link

Scheduled Query Search Page

\*Query Type: Queries

Query: CT\_REQ\_POS\_PSA\_STATUS Search

Query

CT_REQ_POS_PSA_STATUS	Approved POS/PSA Requisitions	Public
-----------------------	-------------------------------	--------

Return

Click on the Query Link

8. Enter the **Business Unit**

9. Click **OK**

CT\_REQ\_POS\_PSA\_STATUS

\*Business Unit DASM1

OK Cancel

10. Click **Run**

**Core-CT**

← | 🕒 | ❤️

**Schedule Query**

Run Control ID: OPMAPPROVALS      Report Manager      Process Monitor      **Run**

Query Name:      

\*Description:

Update Parameters

Prompt Name	Value
BUSINESS_UNIT	<input type="text" value="DASM1"/>

11. Click the **Recurrence** dropdown box & choose a value.
12. Then Click on the **Distribution** link.

**Process Scheduler Request** [X]      Help

User ID: CasellaD      Run Control ID: OPMAPPROVALS

Server Name:       Run Date: 03/26/2015 [📅]

Recurrence: **M-F at 8am**      Run Time: 8:00:00AM     

Time Zone:  [🔍]

**Process List**

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	XLS	<b>Distribution</b>



13. The **Distribution Detail** page displays
14. Check on the **Email Web Report** checkbox
15. Add an **Email Subject**
16. Add **Message Text**
17. Enter **Email Addresses** (for multiple addresses use a semi colon ; between them)
18. Enter the **User** and the **User ID**. **(DO NOT DISTRIBUTE BY ROLE)**
19. Click **OK**

The screenshot shows the 'Distribution Detail' window with the following fields and values:

- Process Name: PSQUERY
- Process Type: Application Engine
- Folder Name: [Dropdown]
- Retention Days: 30
- Email Only** section:
  - Email Subject: OPM PSA\_POS APPROVALS
  - Email With Log:
  - Email Web Report:
  - Message Text: See the attached files for the OPM Approvals.
  - Email Address List: john.doe@ct.gov; jane.doe@ct.gov
  - Override Sender Email Id:
- Distribute To** section:
  - ID Type: User
  - Distribution ID: [Empty field with search icon]
  - Buttons: +, -
- Buttons: OK, Cancel



Users will receive an email with a link in it.

1. Click on the link



The link will have you log into Core-CT or bring you directly to the report.

2. Click on the Report Name that ends in .csv

**Report**

Report ID 12517      Process Instance 13344      [Message Log](#)  
Name PSQUERY      Process Type Application Engine  
Run Status Success

Approved POS/PSA Requisitions

**Distribution Details**

Distribution Node PRODRPTFTP      Expiration Date 11/23/2024

**File List**

Name	File Size (bytes)	Datetime Created
<a href="#">AE_PSQUERY_13344.log</a>	4,707	10/24/2024 1:42:23.797575PM EDT
<a href="#">CT_REQ_POS_PSA_STATUS-13344.xlsx</a>	4,660	10/24/2024 1:42:23.797575PM EDT

**Distribute To**

Distribution ID Type	*Distribution ID
User	CasellaD



3. The Report will display

	A	B	C	D	E	F	G	H	I	J
1	Approved POS/PSA Requisitions	9								
2	Business Unit - DASM1									
3	Requisition ID	Requisition Name	Requisition Status	Requisition Date	Requester	Last Approved By	Date of Approval	Business Unit	Supplier Id	Supplier Name
4	000008875	000008875	Approved	4/29/2024	MarzanoM	COREGuilmartinBri	7/10/2024	DASM1	000000008	TOWN OF BETHANY
5	000008875	000008875	Approved	4/29/2024	MarzanoM	COREGuilmartinBri	7/10/2024	DASM1	0000064731	EPLUS TECHNOLOGY INC
6	000008874	000008874	Approved	4/29/2024	MarzanoM	COREGuilmartinBri	7/10/2024	DASM1	000000008	TOWN OF BETHANY
7	000008847	Test Req Type 150_!	Approved	4/12/2024	MarzanoM	COREGuilmartinBri	7/10/2024	DASM1	0000012872	C & C JANITORIAL SUPPLIES INC
8	000008846	Test Req Type 150	Approved	4/12/2024	MarzanoM	COREGuilmartinBri	7/10/2024	DASM1	0000012872	C & C JANITORIAL SUPPLIES INC
9	000008838	Req Test 150	Approved	4/11/2024	MarzanoM	COREGuilmartinBri	7/10/2024	DASM1	0000012872	C & C JANITORIAL SUPPLIES INC
10	000008807	000008807	Approved	3/14/2024	004176	COREGuilmartinBri	7/10/2024	DASM1	000000001	TOWN OF ANDOVER
11	000008752	RESC Alliance Digital Equity	Approved	11/16/2023	463379	561028	11/20/2023	DASM1	000000243	COOPERATIVE EDUCATIONAL SERVICES
12	000008483	000008483	Approved	8/10/2023	546687	561028	8/14/2023	DASM1	0000214148	MIRANDA NOEL RECTOR