

Scheduling Reports

Navigation:

Core CT Financials > Choose your Module (ex: Purchasing)

> Purchase Orders > Reports

Procedure:

1. Click on PO Balance Report



- 2. Click on Add a New Value
- 3. Enter a Run Control ID
- 4. Click Add
- 5. Input the necessary Information

PO Balance Report					
Run Control ID DailyPOBalance Language English	Report Manager Process Monitor Run				
	PO Balance Remaining				
*Business Unit: Activity Q PO Number Q	○ Yes ○ No ® All				
07/01/2022 時	Obligation Balance Remaining				
From Date: 07/27/2022	⊖Yes ⊖No ®All				
	Include Closed PO's				
Buyer:	Q.1. Q.1.				
Ledger Group:	⊖ Yes ● No				
Chartfield Criteria					
Fund Code: Department: Account: Program Co Q Q Q Q	ode: Project: SID:				
🔚 Save 🔯 Return to Search 🖃 Notify	🛃 Add 🖉 Update/Display				

6. Once complete Click Save and then Run

Proce	ss Schedul	er Request							Help
	User ID	COREBryantK			Run Control	ID DailyP	OBalance		
9	Server Name		* *	Run Date Run Time	e 07/27/2022 e 2:40:32PM	31	Reset to Currer	t Date/Time]
Proce	ss List	Q						6	
Select	Description		Process N	lame	Process Type	*Type	*Format	Distribution	
	Purchase Or	der Balance Report	POBALA	NC	SQR Report	Web	✓ PDF	✓ Distribution	
OK	Car	icel							

7. Click the Recurrence dropdown box & choose a value.

				Help
User ID	SinkfieldN	Run Control	ID POBalance	
Server Name	PSNT V	Run Date 07/28/2022	31	
Recurrence	R	Run Time 6:55:23AM	Reset to Current Date/Time	
Time Zone	M.	*		
Process List	AP_430PM AP_4PM		200 - 2.200	
Select Description	AP_630PM	Process Type	*Type *Format Distribution	
OK Ca	CTDELRPT DDS FYE Daily Daily Purge Daily Search Rebuild Daily_7ap EOCM Daily Partner Cleanup	Carriepor		
	Every15Mins Every45Mins FYE_AP_BUD_CHECK FYE_AP_DOC_TOL FYE_AP_MATCH M-F at 10pm M-F at 10pm M-F at 5pm			.s

8. Then Click on the Distribution link.

ſ	Process Scheduler Request						×
	User ID SinkfieldN		Run Control	ID POBalance			Help
	Server Name PSNT Recurrence M-F at 8am Time Zone	Run Da Run Tin	te 03/26/2015 ne 8:00:00AM	R	eset to Curre	ent Date	
l	Process List Select Description	Process Name	Process Type	*Type	*Format	Distribution	
	Purchase Order Balance Report OK Cancel	POBALANC	SQR Report	Web 🗸	CSV	✓ Distribution	
IS							

- 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

	Distribution Detail	X	Hon
	Process Name POBALANC	*	
	Process Type SQR Report	- 14	
	Folder Name	- 1	
ocess	Retention Days 30		
	Email Only		
	Email Subject Email With Log: 🗆 Email Web Report: 🖡	2	
Ser	PO Balance Report		
Re	Message Text	6	to Cu
ocess	Daily PO Balance Report for Fund 11000		omat
OK	Email Address List	2	SV
	Nora.Sinkfield@ct.gov;Maureen.Sullivan@ct.gov		
	Distribute To		
	User V SinkfieldN	THE I	
	User V SullivanMau	H E	
			-

Users will receive an email with a link in it.

20. Click on the link

PO Balance Report	
DOIT.CORE.Test@po.state.ct.u To Odoit.core.emailtest@ct.gov; Odoit.core.emailtest@ct.gov; +4 ot	← ← ···· 7:05 AM
Daily PO Balance Report for Fund 1100	0
http://web003.crct.ct.gov:9300/psc/FNTF P/c/CDM_RPT.CDM_RPT.GBL? Page=CDM_RPT_INDEX&Action=U&	PR/EMPLOYEE/ER DM ID=4139

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

21. Click on the Report Name

Report				
Report ID 4139	Process Instance 4287	Message Log		
Name POBALANC	Process Type SQR	Report		
Run Status Success				
Purchase Order Balance Report				
Distribution Details				
Distribution Node PRODRPTFTP	Expiration Date	08/27/2022		
File List				
Name	File Size (bytes)	Datetime Created		
POBALANC_4287.csv	14,626	07/28/2022 7:04:54.906633AM ED		
POBALANC_4287.out	127	07/28/2022 7:04:54.906633AM ED		
POBALANC_CSV_Layout.csv	375,150	07/28/2022 7:04:54.906633AM ED		
SQR_POBALANC_4287.log	1,760	07/28/2022 7:04:54.906633AM ED		
Distribute To				
Distribution ID Type	*Distribution ID			
User	COREBryantK			
User	SinkfieldN			
User	SullivanMau			

22. Your report will display

							-
	State of Connecticut						
Report ID:	POBALANC	PURCHASE ORDER BALAN	Page No. 1				
Run Contr	POBalance	Run Date	7/28/2022				
Bus Unit:	DPHM1	Po Id:	Run Time	7:04:44			
Vendor Id	ALL						
Date From	1-Jul-17	To:	31-Jan-21				
PO Balanc	e Remaining: \	/es					
Obligation Balance Remaining: No							