



Scheduling Reports

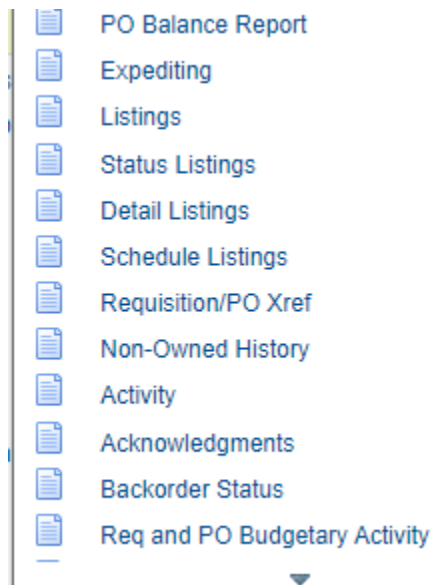
Navigation:

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 Report Manager Process Monitor **Run**

Language: English

*Business Unit: PO Number:

Supplier ID:

From Date: Through Date:

Buyer:

Ledger Group:

PO Balance Remaining
 Yes No All

Obligation Balance Remaining
 Yes No All

Include Closed PO's
 Yes No

Chartfield Criteria

Fund Code: Department: Account: Program Code: Project: SID:

Save **Return to Search** **Notify** **Add** **Update/Display**

6. Once complete Click Save and then Run

Process Scheduler Request Help

User ID: COREBryantK Run Control ID: DailyPOBalance

Server Name: Run Date: **Reset to Current Date/Time**

Recurrence: Run Time:

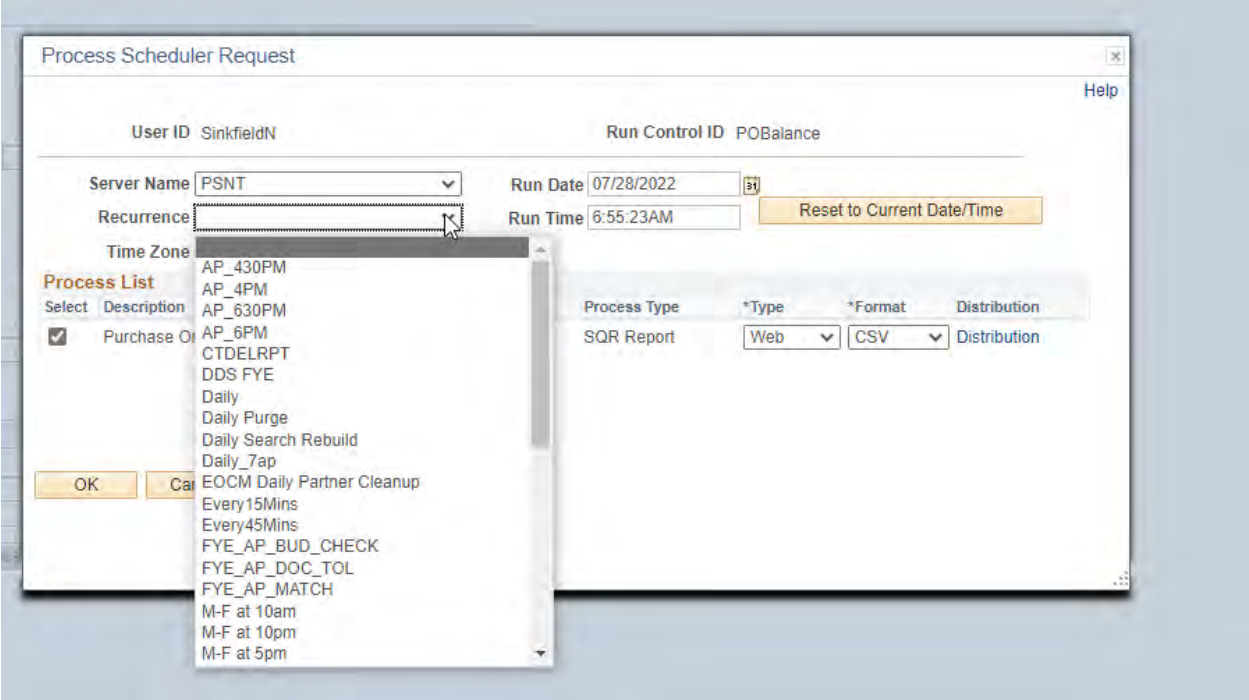
Time Zone:

Process List

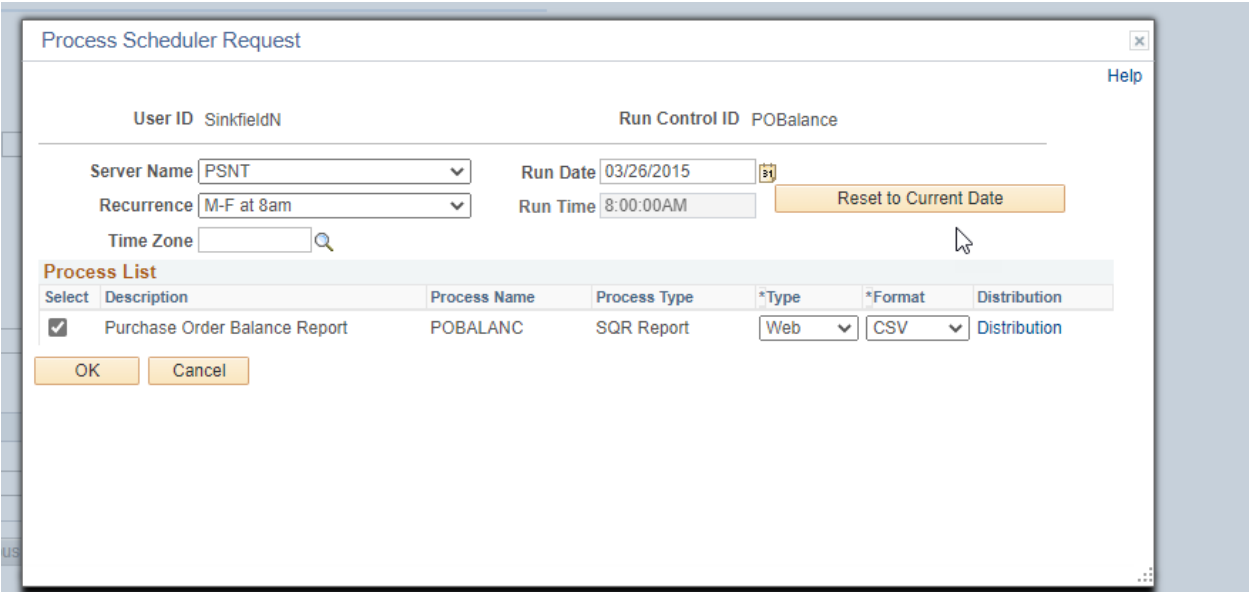
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Purchase Order Balance Report	POBALANC	SQR Report	Web	PDF	Distribution

OK **Cancel**

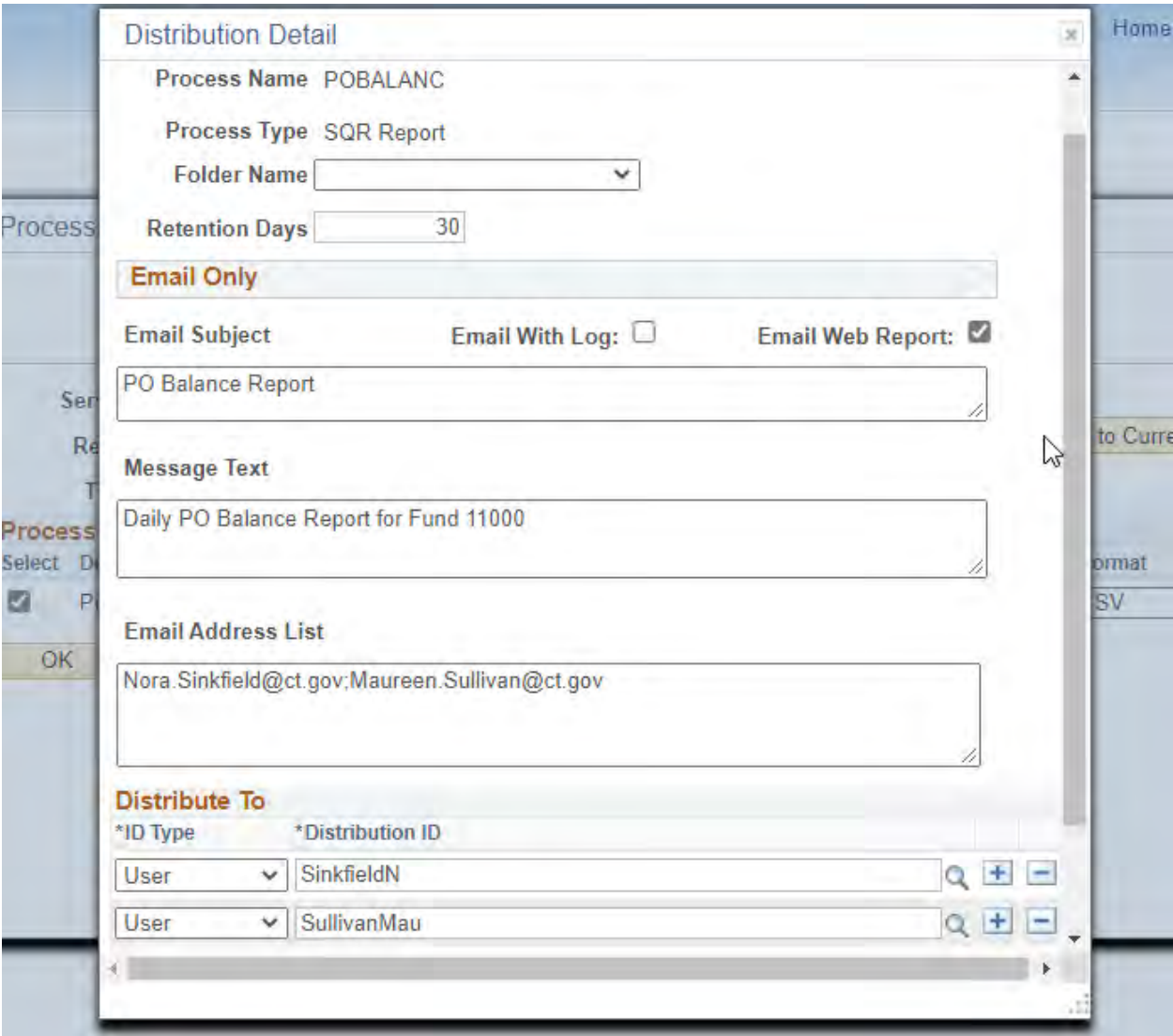
7. Click the Recurrence dropdown box & choose a value.



8. Then Click on the Distribution link.

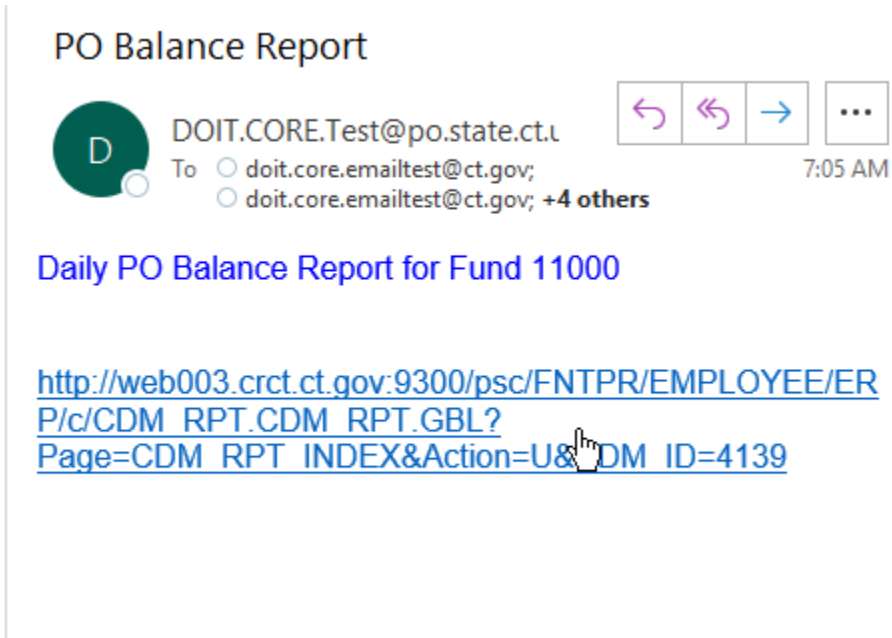


- 13. The Distribution Detail page displays
- 14. Check on the Email Web Report checkbox
- 15. Add an Email Subject
- 16. Add Message Text
- 17. Enter Email Addresses (for multiple addresses use a semi colon ; between them)
- 18. Enter the **User** and the User ID. (**DO NOT DISTRIBUTE BY ROLE**)
- 19.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



Users will receive an email with a link in it.

20. Click on the link



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 EDT
POBALANC_4287.out	127	07/28/2022 7:04:54.906633AM EDT
POBALANC_CSV_Layout.csv	375,150	07/28/2022 7:04:54.906633AM EDT
SQR_POBALANC_4287.log	1,760	07/28/2022 7:04:54.906633AM EDT

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 Balance Remaining:	Yes							
Obligation Balance Remaining:	No							