Emailing JSA Reports

Q: Can you explain the new email reports feature in JSA?

A new feature in the Journal Staging Area application is the ability to email a detail report to another Yale employee. JSA users may send reports on transactions that need to be authorized to the authorizer, and any report that used to be faxed may now be sent directly.

To email a report,

- Select the **Name** of the report and set the **Parameters** on the **Submit Request** window. Instead of clicking the **Submit** button, select the **Options** button on the **Submit Requests** window. The **Upon Completion** window will open.
- Place the cursor in the **Name** field. Click the List of Values button.
- The **People** window will open. Type in the last name of the person who will receive the email, and select the **Find** button.
- From the resulting list, select the proper person and click **OK**.
- Choose the **OK** button. The window will close, returning the user to the **Submit Request** window. Select **Submit** on the **Submit Request** window to send the email.
- The recipient of the email will receive a message in which the subject line contains the request number and the name of the report.
- The email will contain a **URL** link to the report. Click the link to open the .pdf file in Adobe Acrobat.

Notes:

This report can be opened only once. If the recipient will need the report, s/he must print the report or save the .pdf file on their computer.

The email process does not allow you to send a message along with the report. Instead of using the email function, run the report normally, and save the .pdf file. This file may be sent as an email attachment.

If the report is sent to more than one user, only the first person to open the report will see it. Instead of using the email function, run the report normally, and save the .pdf file. This file may be sent as an email attachment.

Complete documentation is available on line in the JSA User Guide and JSA Scenarios (www.yale.edu/oboe, Learning Modules, JSA binder).

Q: How does the Zoom shortcut work in LD?

Although there have been minimal changes to the various Oracle applications due to R11i, the HR application has experienced a couple of changes. One change in particular is the method for accessing the Labor Distribution Module (i.e., Schedule Lines) through an employee's HR record.

The process for linking to LD from HR is a follows: From the People Form click the Assignment button to access the Assignment Form. On the Assignment Form, use the "Zoom" shortcut button on the Toolbar  (it's been described as looking like a toaster). This will link the user to the Schedule Lines form in LD. Once the user has completed entering the schedule lines and closes the form, the user will be returned to the Assignment Form.