Setting Up Recurring Reports in SpearMart

Setting Up a Recurring Report

Export reports can be scheduled to recur on a regular basis

Saved search exports can be scheduled to recur

A saved search that uses a data range of **Last Month** or **Last Week** is eligible for recurring exports.

> **Last Month** - When you create a recurrence on a saved search with a date range of Last Month, a monthly export is created. Monthly extracts should be available on the 2nd of each month.
>
> **Last Week (Sun – Sat)** – When you create a recurrence on a saved search with a date range of Last Week a weekly scheduled extract will be created. Weekly extracts will be queued to run Sunday at 12:01 am. Depending on the number of extracts scheduled completion time may vary, but should be available no later than Monday at noon.
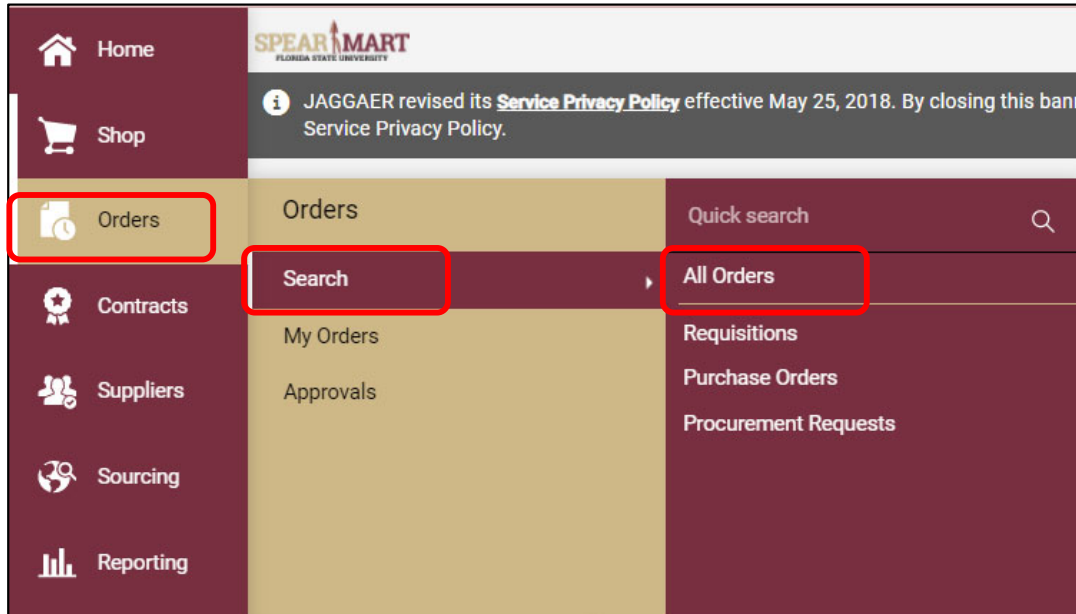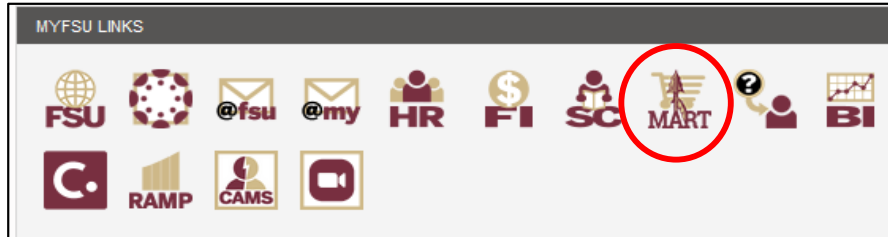
A **recurring export** can be configured only from a user's <u>personal</u> saved searches only.

Scheduled **recurring** extracts can be deleted and will expire one year from the date they were created.

Setting Up a Recurring Report

1. Access SpearMart by navigating to https://my.fsu.edu/ and logging in with your MyFSU username and password, and then click the SpearMart Icon under MyFSU Links:

Then click the Orders icon in the left column, Search, All Orders

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When the search screen comes up, Click the "Type of Order: All" link. Then select the type of document you want to search for from the choices as shown. Once selected, click "Apply."

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For this example, we are searching for all Purchase Orders processed on the Department's budget within the past month (30 days). Select the PO option and click "Apply." From there, Select the Created Date: Last 90 days and click the down arrow. Select the time frame you are wanting to search and click "Apply."

There are numerous options to choose from and you can also customize the needed date range as shown.

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PROCUREMENT SERVICES

Once selected, the results will be filtered by PO and date range, as shown below. The next step is to add the filter to search by Dept ID. Click the down arrow by "Add Filter" and a drop down box will appear for you to add additional filters.

Type in "Department" and the search options will filter. Click the "*Department ID" option.

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Enter your Dept ID into the search box and click "Apply."

Once selected your search results are filtered by your selected criteria, as noted below.

To save this report, click "Save As" at the top, right hand side of the screen.

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Once selected, a pop-up box will appear. Enter in a nickname for your report for later use. The Select Folder Destination. If you do not have any saved folders, click "Add New."

Once you click "Add New," a drop down will appear:

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Once folder is selected, this screen will appear, and you will click save.:

When you click save, the following box will appear at the top of your screen. Click "Manage Search Exports."

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When you click to go to the download page, the item will show up with Pending or Paused status.

When the report has downloaded, you can click the blue link to open the report in Excel and save as needed.

Manage Exports

Export Requests | Export Schedules

> Click to Filter

Refresh this Page

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
227000 monthly PO's	Paused - Waiting for Resources	All Orders	Screen Layout (Excel)	4/18/2022 10:55:27 AM	–	–	-	Delete

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
227000 monthly PO's	Completed	All Orders	Screen Layout (Excel)	4/18/2022 8:26:24 AM	4/18/2022 8:26:27 AM	4/25/2022	Total Records: 207	Delete

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To create a recurring export for this search, click "Export Schedules." From there, click the "Create Schedule For.." For this example, we have selected Purchase Order, so click the "Purchase Order" option.

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Once selected, the below pop up will appear. Select from the options noted below that best suits your needs. You can choose how often and what day and time as well. When done, click save.

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Once saved, you will see the message below.

You will get notified that you have a report ready each week or month when the scheduled report runs.