



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.

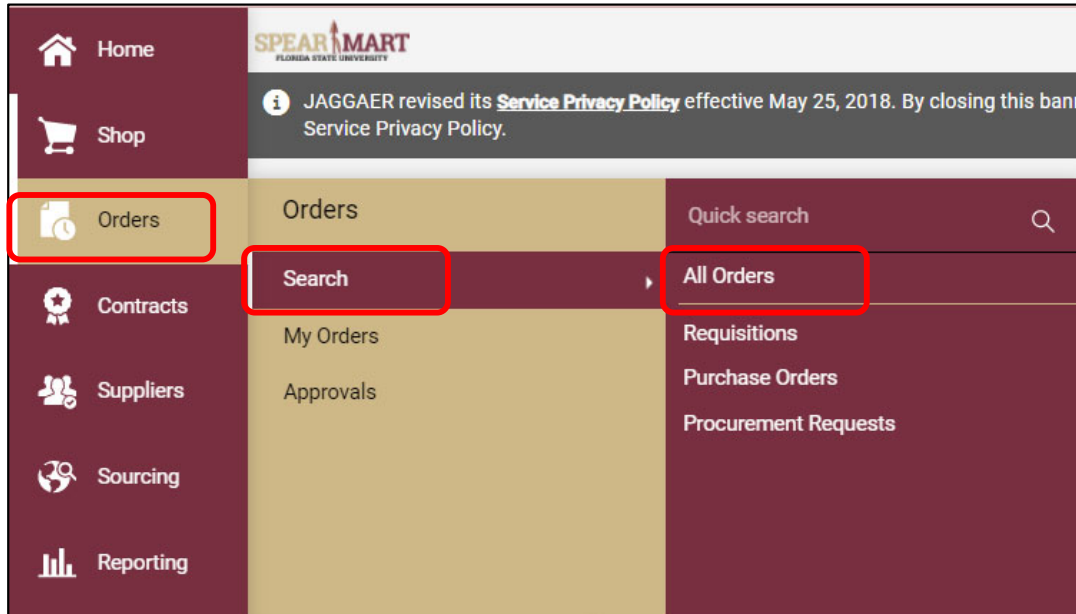
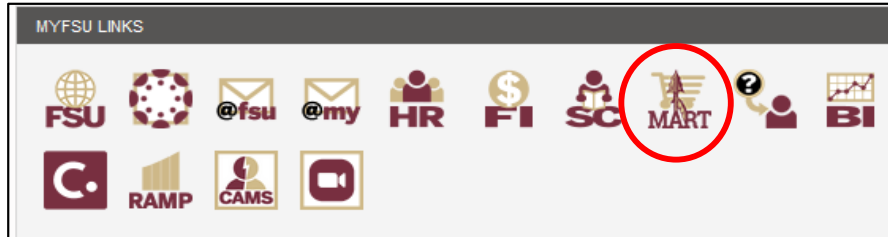
A **recurring export** can be configured only from a user's personal saved searches only.

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

Setting Up a Recurring Report



Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
FS22031515	Purchase Order	Complete	Margaret A. Vanos	4/14/2022 8:07:34 AM	4/14/2022 8:07:54 AM	A J TROPHIES & AWARDS INC	1,901.25 USD
FS22031514	Purchase Order	Complete	Lisa Lopez	4/14/2022 8:02:02 AM	4/14/2022 8:02:18 AM	TARGET COPY INC	985.82 USD
FS22031513	Purchase Order	Complete	Chunfeng Zheng Gwendolyn R. Drake	4/14/2022 7:53:41 AM	4/14/2022 7:59:01 AM	NEW ENGLAND BIOLABS INC	270.30 USD
FS22031512	Purchase Order	Complete	Lisa M. Jackson	4/14/2022 7:52:40 AM	4/14/2022 7:53:03 AM	NGC US LLC	250.00 USD
FS22031511	Purchase Order	Complete	Terence Longordo	4/14/2022 7:48:48 AM	4/14/2022 7:49:11 AM	AMAZON CAPITAL SERVICES INC	133.80 USD

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.”

Type of Order: All Created Date: Last 90 days

- Purchase Order
- Requisition

Apply Cancel

Setting Up a Recurring Report



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."

Type of Order: All Created Date: Last 90 da

Purchase Order

Requisition

Apply Cancel

Type of Order: Purchase Order Created Date: Last 90 days

Quick search

Page 1 of 50

All

Within Last 90 days

Between [] and []

more options >

Order Identifier Type

FS22031520 Purchase Order

Apply Cancel

Created Date: Last 90 days

All

Within Last 90 days

Between [] and []

more options >

Days

- Last 7 days
- Last 30 days
- Last 60 days
- Last 90 days
- Last 120 days
- Last 180 days
- Last Week
- This Week
- Yesterday
- Today

Calendar

- Month-To-Date
- Year-To-Date
- Last Month
- Previous Year

Fiscal

- Fiscal Year-To-Date
- Previous Fiscal Year

Apply Cancel

Complete	Last Week	4/14/2022	4/14/2022	YOUGO
	This Week	8:19:38 AM	8:19:52 AM	
Complete	Yesterday			
Complete	Today			
Complete	Calendar	4/14/2022	4/14/2022	SOTER
	Month-To-Date	8:16:23 AM	8:16:48 AM	
Complete	Year-To-Date			
Complete	Last Month	4/14/2022	4/14/2022	AMAZO
	Previous Year	8:12:03 AM	8:12:24 AM	SERVIC
Complete	Fiscal			
Complete	Fiscal Year-To-Date	4/14/2022	4/14/2022	AMAZO
	Previous Fiscal Year	8:11:22 AM	8:11:47 AM	SERVIC

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

Created Date: Last 90 days

All

Within Last 30 days

Between [] and []

more options >

Apply Cancel

Setting Up a Recurring Report



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.

The screenshot shows a procurement system interface. At the top, there are filter options: "Type of Order: Purchase Order" and "Created Date: Last 30 days". Below these is a search bar and an "Add Filter" button. A table of results is displayed with columns for Order Identifier, Type, Order Status, Order Owners, and Created Date/Time. The table contains several rows of purchase orders, all marked as "Complete".

Order Identifier	Type	Order Status	Order Owners	Created Date/Time
FS22031528	Purchase Order	Complete	Gwendolyn R. Drake	4/14/2022 8:36:01 AM
FS22031527	Purchase Order	Complete	Gwendolyn R. Drake	4/14/2022 8:33:56 AM
FS22031526	Purchase Order	Complete	Casey L. Hagwood Marcia D. McClellan	4/14/2022 8:32:56 AM
FS22031525	Purchase Order	Complete	Gwendolyn R. Drake	4/14/2022

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

This close-up shows the dropdown menu for the "Add Filter" button. The search term "Department" is entered into the search box. The dropdown list shows several options, with "*Department ID" highlighted by a red box.

- Department (Requester Dept.)
- *Department ID

Setting Up a Recurring Report



*Department ID: All X

Is Equal To Starts With Is Between

227000

Search for Values...

Any Value +

No Value/Blank +

010000 - VP Finance & Admi... +

010019 - COVID-19 +

027000 - Procurement Services +

Apply Cancel

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.

Search All Orders Save As Pin Filters Export All

Quick Filters My Searches

Type of Order: Purchase Order Created Date: Last 30 days Quick search

Add Filter Clear All Filters

*Department ID: Is Equal To:227... X

1-199 of 199 Results 200 Per Page

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
<input type="checkbox"/> FS22031549	Purchase Order	Complete	Carolyn E. Hall	4/14/2022 9:27:52 AM	4/14/2022 9:28:12 AM	HVAC TESTING SERVICES	600.00 USD
<input type="checkbox"/> FS22031547	Purchase Order	Complete	Carolyn E. Hall	4/14/2022 9:20:55 AM	4/14/2022 9:26:20 AM	KELLY SHEET METAL	1,390.00 USD
<input type="checkbox"/> FS22031536	Purchase Order	Complete	Carolyn E. Hall	4/14/2022 8:41:54 AM	4/14/2022 8:42:15 AM	INTEGRATED DNA TECHNOLOGIES INC	6.68 USD
<input type="checkbox"/> FS22031530	Purchase Order	Complete	Carolyn E. Hall	4/14/2022 8:37:53 AM	4/14/2022 8:38:14 AM	RPMC LASERS INC	215.00 USD
<input type="checkbox"/> FS22031529	Purchase Order	Complete	Carolyn E. Hall	4/14/2022	4/14/2022	INTERWORLD HIGHWAY LLC	81.45 USD

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

Setting Up a Recurring Report



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.”

Save Search [Close]

Step 1: Details

Nickname *

[Add Description](#)

Step 2: Select Folder Destination [Add New](#) [v]

Personal

- [more stuff](#)
- [my stuff](#)

Shared

You have no shared searches.

Save [Close]

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

Save Search [Close]

Step 1: Details

Nickname *

[Add Description](#)

Step 2: Select Folder Destination [Add New](#) [v]

Top level personal folder

Subfolder of selected folder

Create Personal Folder [Close]

Name *

Description

204 characters remaining

★ Required **Save Changes** [Close]

Setting Up a Recurring Report



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

Save Search

Step 1: Details

Nickname ★

[Add Description](#)

Step 2: Select Folder Destination [Add New](#)

▲ **Personal**

- [more stuff](#)
- [my stuff](#)
- [PO's by Month](#)**

▲ **Shared**

You have no shared searches.

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

Success ▶ ✕

Successfully created the export request . You can view the status and retrieve the file at [Manage Search Exports](#)

Setting Up a Recurring Report



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

Setting Up a Recurring Report



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.

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	Completed	All Orders	Screen Layout (Excel)	4/18/2022 10:55:27 AM	4/18/2022 10:55:33 AM	4/25/2022	Total Records: 446	Delete

Manage Exports

Export Requests Export Schedules

> Click to Filter

No export schedules found

Create Schedule for...
All Orders
Contract Requests
Purchase Order
Requestion
Sourcing Event
Sourcing Event Requests
Supplier Requests
Users

Setting Up a Recurring Report



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.

Schedule Export [Close]

Scheduled exports are queued for processing after midnight local time to be available the following morning.

Search Type: **Purchase Order**

Search To Export *: 227000 Monthly PO's

Type *: Screen Layout

Format: Excel

Starts On *: 4/19/2022
mm/dd/yyyy

Frequency *: Monthly

Occurs Every *: 1 month(s)

By the Week and Day of the Month

On The *: First Monday of the month

Export Until *: Ends After 1 occurrences
 Ends By
 No End Date

Save



Setting Up a Recurring Report



Once saved, you will see the message below.

Manage Exports ?

[Export Requests](#) | [Export Schedules](#)

[Click to Filter](#) Create Schedule for... ▼

Search To Export	Status	Created	Export Content	Frequency	Ending	Next Run	Actions
227000 Monthly PO's	Enabled	4/18/2022 11:37:20 AM	Search Type: Purchase Order Export Content: Screen Layout- Excel	Monthly More	1 of 1 remain	5/2/2022 12:00:00 AM	Edit ▼

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