



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.

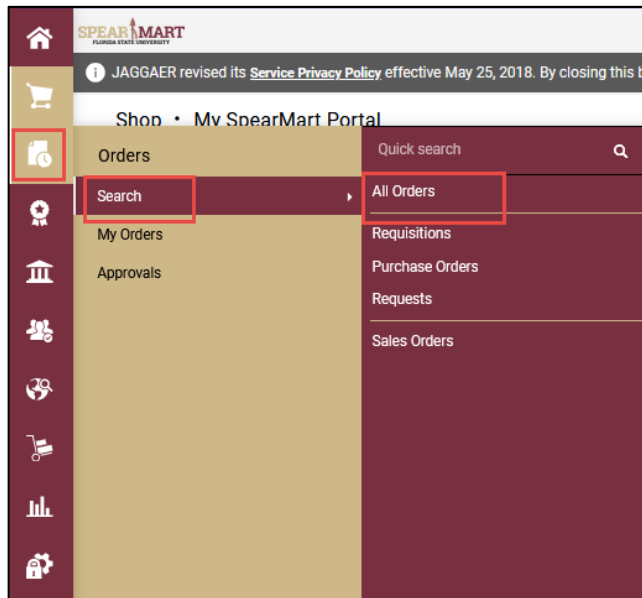
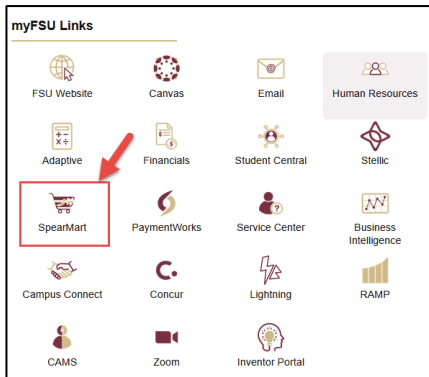
A **recurring export** can be configured only from a user's personal saved searches only.

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



Search All Orders

Quick Filters My Searches **Type of Order: All** Created Date: Last 90 days Quick search Add Filter Clear All Filters

Page 1 of 50 1-200 of 27828 Results 200 Per Page

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
☐ FS27012792	Purchase Order	Complete	Danielle Smith, Emily Porter	9/29/2026 3:57:57 PM	9/29/2026 3:58:11 PM	RGH ENTERPRISES INC ①	31.98
☐ 221758341	Requisition	Pending	Lydia Ponce	9/29/2026 3:55:12 PM		AJ TROPHIES & AWARDS INC ①	31.95
☐ FS27012791	Purchase Order	Complete	Ben A. Young, Danielle Smith	9/29/2026 3:52:56 PM	9/29/2026 3:53:13 PM	B & H FOTO & ELECTRONICS CORP ①	28.52
☐ FS27012790	Purchase Order	Complete	Kristin G. Tubeck	9/29/2026 3:50:26 PM	9/29/2026 3:50:56 PM	RGH ENTERPRISES INC ①	41.10
☐ FS27012789	Purchase Order	Complete	Matthew K. Ayer	9/29/2026 3:50:26 PM	9/29/2026 3:50:55 PM	RGH ENTERPRISES INC ①	55.02

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

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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."

Type of Order: All Created Date: Last 90 days

☒ 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 >

☐ 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

4/14/2022	4/14/2022	YOUGO
8:19:38 AM	8:19:52 AM	
4/14/2022	4/14/2022	SOTER
8:16:23 AM	8:16:48 AM	
4/14/2022	4/14/2022	AMAZO
8:12:03 AM	8:12:24 AM	SERVIC
4/14/2022	4/14/2022	AMAZO
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

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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 the Procurement Services interface. On the left, there are filters for Supplier (Amazon Capital Services Inc, Office Depot Inc, VWR International LLC, CDW Government, B & H Foto & Electronics Corp) and Department (Requester Dept.). The main area displays a table of purchase orders with columns for Order Identifier, Type, Order Status, Order Owners, Created Date/Time, and Co Da. The table shows four rows of purchase orders, all with a status of 'Complete'. The 'Add Filter' button is highlighted with a red box, and the 'Type of Order: Purchase Order' and 'Created Date: Last 30 days' filters are also highlighted with red boxes.

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

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

The screenshot shows the 'Add Filter' dropdown menu. The search box contains the text 'Department'. Below the search box, there are two options: 'Department (Requester Dept.)' and '*Department ID'. The '*Department ID' option is highlighted with a red box.

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*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

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
☐ 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
☐ 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
☐ 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
☐ 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
☐ FS22031529	Purchase	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

Step 1: Details

Nickname *

227000 monthly PO's

[Add Description](#)

Step 2: Select Folder Destination

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

Step 1: Details

Nickname *

227000 monthly PO's

[Add Description](#)

Step 2: Select Folder Destination

Top level personal folder

Subfolder of selected folder

Add New

×

Create Personal Folder

Name *

PO's by Month

Description

List of PO's processed by month on Dept ID 227000

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](#)

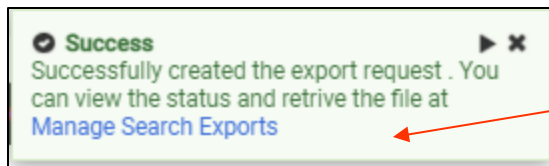
[PO's by Month](#)

Shared

You have no shared searches.

[Save](#) [Close](#)

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

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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.

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

Requisition

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 ✕

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

Frequency * Monthly ▾

Occurs Every *
Daily
Monthly
Weekly

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	Monthly More	1 of 1 remain	5/2/2022 12:00:00 AM	Edit
			Export Content	Screen Layout- Excel				

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