

Step-by-Step Guide

Creating a Recurring Search Report



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If you are creating an advanced search that looks at data from "Last Month" or "Last Week" you can schedule this search to run each month (or each week) and create a report for you. If you choose a saved search with a date range of "Last Month" a monthly report is created. The data needed for this look at the last month is available beginning the 2nd day of the month. If you choose a saved search with a date range of "Last Week" a weekly report is created.

A Recurring Search Report can only be created from a Saved Search. Please see the procedure document titled "Creating a Saved Search" for more information on how to do this.

Procedure (Creating a new Recurring Search Report)

1. Step 6 of the "Creating a Saved Search" document discusses creating a Saved Search from the Advanced Search page. A Recurring Search Report can only be created by using a Saved Search that uses "Last Week" or "Last Month" in the date information.

The screenshot shows the 'Advanced Search' page for 'Requisitions'. The 'Submit Date' dropdown menu is open, displaying various date range options. The 'Last Week' and 'Last Month' options are highlighted with red circles. The page includes a search bar, a 'Go' button, and several input fields for search criteria such as Requisition Number(s), Requisition Name, Participant(s), Prepared For, Prepared By, Approved By, Date, Total Amount, Supplier, Department, Catalog Number(SKU), Product Description, Commodity Code, Form Name, Form Type, Product Flags, and Purchase Order Identification.

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- For this example we are going to create a Saved Search that looks for Requisitions with the date set at "Last Week". On the Advanced Search page you have many other criteria that can be added to your search but we are keeping it simple for the sake of this example.

Prepared By
Approved By
Date
Total Amount
Supplier
Department

Item/Product Information
Catalog Number(SKU)
Product Description
Commodity Code
Form Name
Form Type
Product Flags

Submit Date: All Dates
All Dates
Custom Date Range
Days
Last 7 days
Last 30 days
Last 60 days
Last 90 days
Last 120 days
Yesterday
Today
Last Week
This Week
Calendar
Month-To-Date
Last Month

- After selecting "Requisitions" and a time frame of "Last Week" we hit the blue "Go" button at the top or bottom of the Advanced Search page.

Orders & Documents | Document Search | Search Documents | Document Search

Go to: simple search | my requisitions | my purchase orders | my invoices

Search: Requisitions

Go

Requisition Identification
Requisition Number(s)
Requisition Name

- A page should be generated that displays the results of your search. In this case there were a *lot* of results so a page is generated that displays the first page of the search results.

Showing 1 - 200 of 686 Results

Last Week (8/31/2014-9/6/2014)

Results Per Page: 200 | Sort by: Best match | Page 1 of 4

Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
✓ 53944212	Staples	2014-09-05 jamlamb 01	Jamey Lamb	9/5/2014 5:18 PM	85.77 USD
✓ 53930935	FIA CARD SERVICES NTL ASSOC	Sahlu - Kenya Scholars	TILAHUN SAHLU	9/5/2014 4:57 PM	3,385.20 USD
✓ 53938569	Staples	M Hamilton Supplies	NICOLE Y STANLEY	9/5/2014 4:35 PM	10.02 USD
✓ 53941116	CSGS	2014-09-05 mpenny 01 CSGS 2015 MEMBERSHIP DUES	JENNIFER A MYRICK	9/5/2014 4:35 PM	150.00 USD
✓ 53942788	L&M OFFICE FURNITURE	2014-09-05 L&M	CHARYL LYNN TURNER	9/5/2014 4:34 PM	80.00 USD

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5. On the left side of the search results, inside the box labeled "Filtered by", you will see a blue button labeled "Save Search". In order to create a recurring report we will first need to create a saved report, so click on the blue "Save Search" button.

Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
53944212	Staples	2014-09-05 jamlamb 01	Jamey Lamb	9/5/2014 5:18 PM	85.77 USD
53930935	FIA CARD SERVICES NTL ASSOC	Sahlu - Kenya Scholars	TILAHUN SAHLU	9/5/2014 4:57 PM	3,385.20 USD
53938569	Staples	M Hamilton Supplies	NICOLE Y STANLEY	9/5/2014 4:35 PM	10.02 USD
53941116	CSGS	2014-09-05 mpenny 01 CSGS 2015 MEMBERSHIP DUES	JENNIFER A MYRICK	9/5/2014 4:35 PM	150.00 USD
53942788	L&M OFFICE FURNITURE	2014-09-05 L&M	CHARYL LYNN TURNER	9/5/2014 4:34 PM	80.00 USD

6. This will open a pop-up window titled "Add to Saved Searches"

Add to Saved Searches

Step 1: Edit Saved Document Search Details

Document Search Nickname:

[Add Description](#)

Step 2: Select Destination Folder

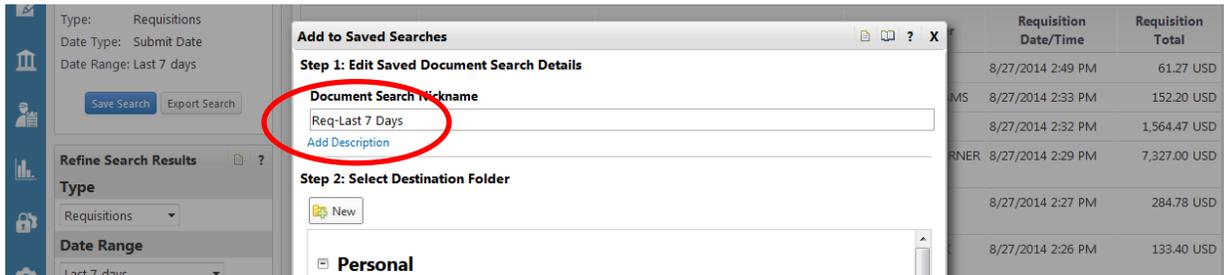
- New
- Personal
 - Jimbo
- Shared
 - Compellent Orders
 - Library Acquisitions
 - Psychology Department
 - Requisitions
 - Shared Search Queries

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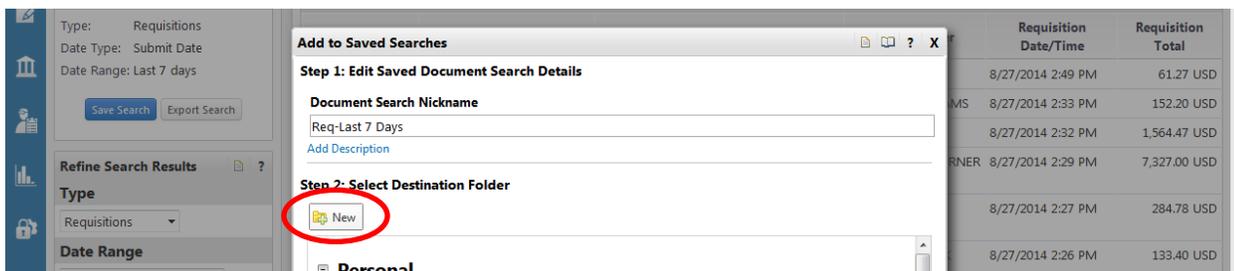
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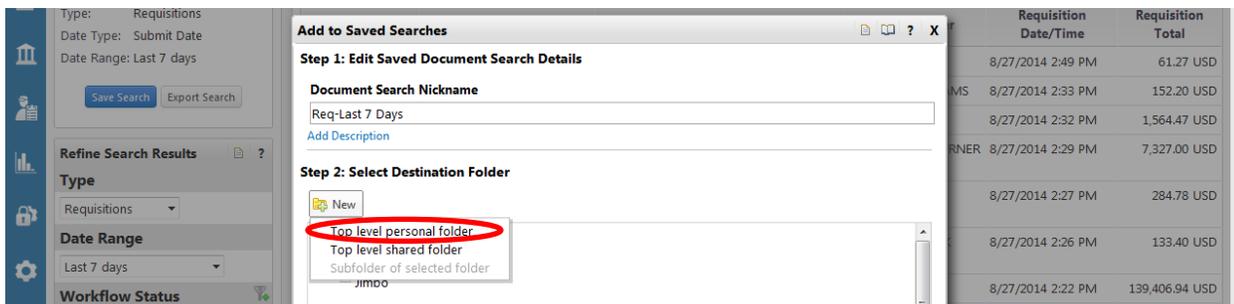
7. This page allows you to give your search a nickname so that you will recognize it when you see it again. We're naming this search "Req-Last 7 Days". You can also add a description by clicking on the "Add Description" link if you like.



8. If you have already created a folder to keep your saved searches in you can select that at this time. If you need to create a folder you should select the "New" button under the "Step 2: Select Destination Folder" heading.



9. This will allow you to create your new folder in the "personal folder" area, the "shared folder" area, or in a subfolder area if that is appropriate. We're going to put our saved search in the "personal folder" area so we will select "Top level personal folder".

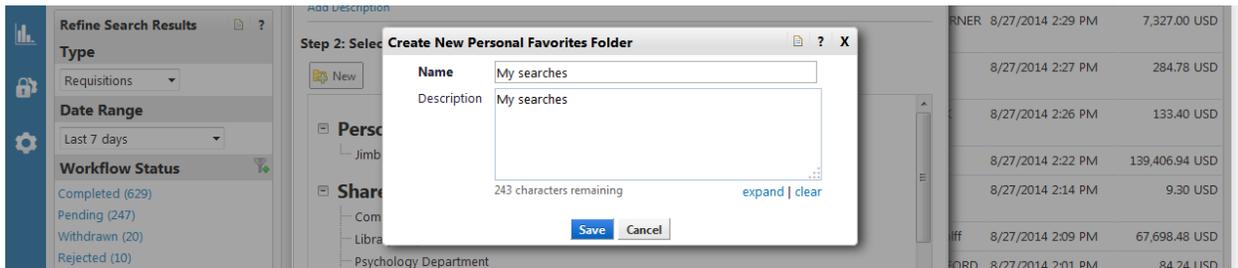


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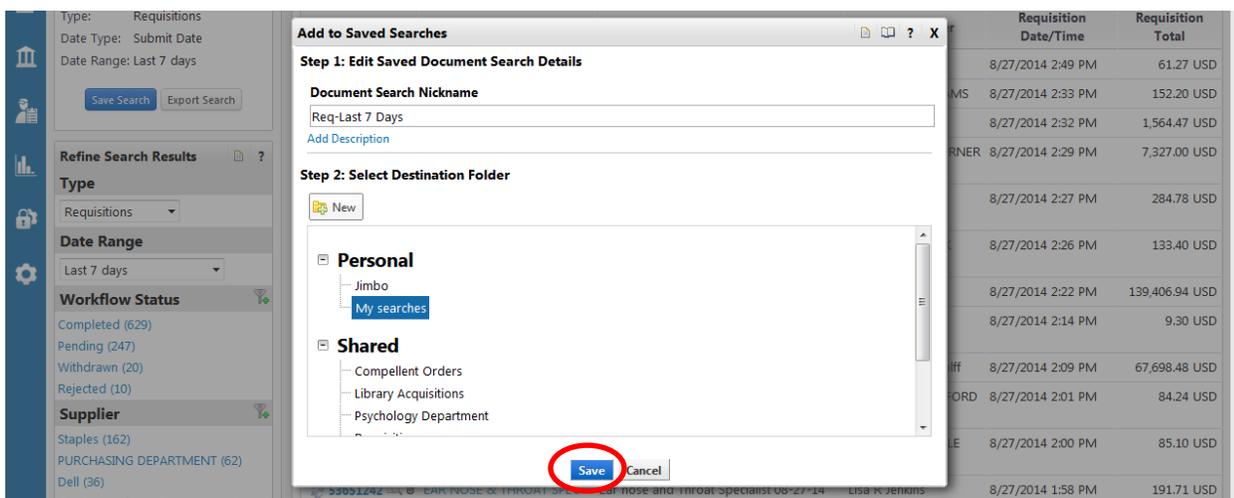
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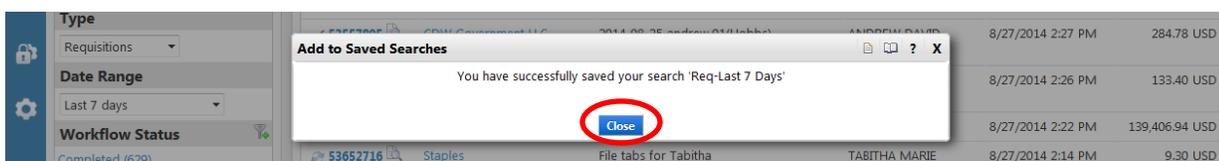
10. Another pop-up window will appear that will allow you to name your folder and add a description. We will use "My searches" as both the name and the description but you should name your folder something meaningful to you.



11. Click on the blue "Save" button to save your new folder. Your folder should appear in the "Select Destination Folder" area under the "Personal" heading. It should be selected by default at this point but you can click on it to make sure it is selected. To finish saving your saved search "Req-Last 7 Days" click on the blue "Save" button at the bottom of the page.



12. A congratulatory message should appear to let you know of your success! After basking in your success for a few precious moments you can close this window by clicking on the blue "Close" button.

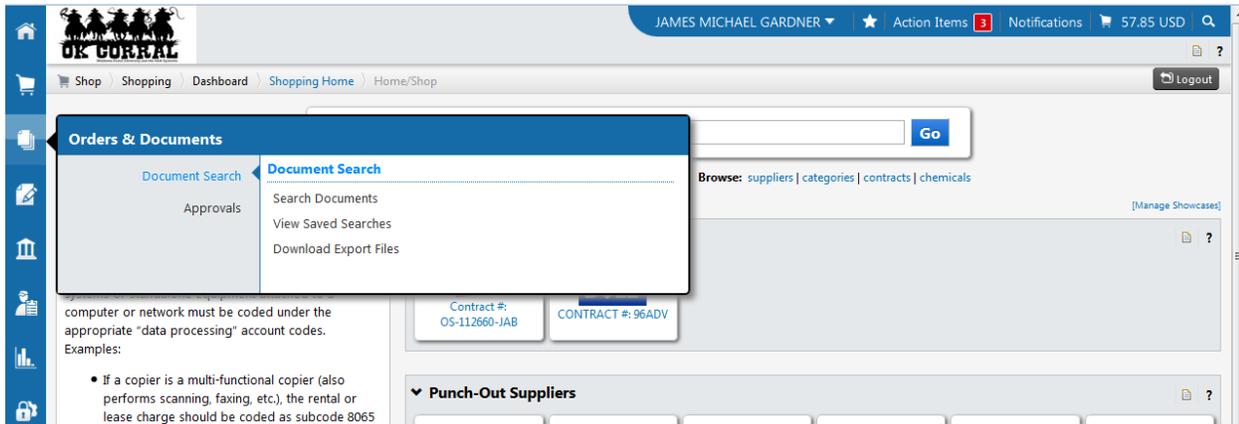


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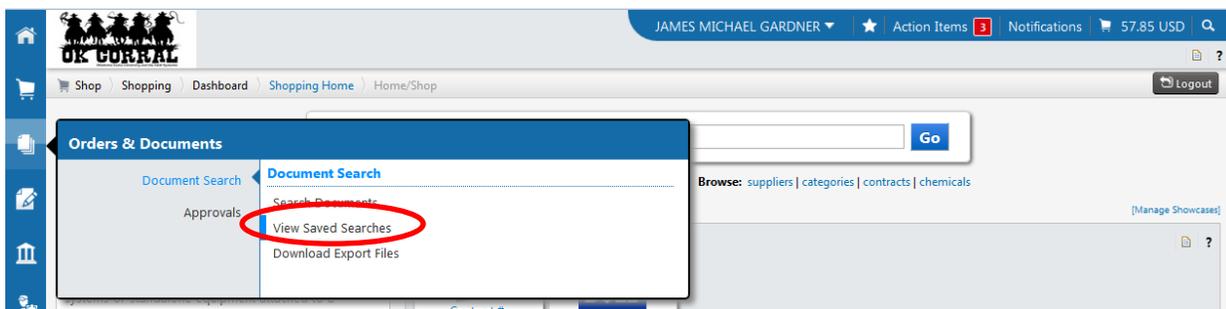
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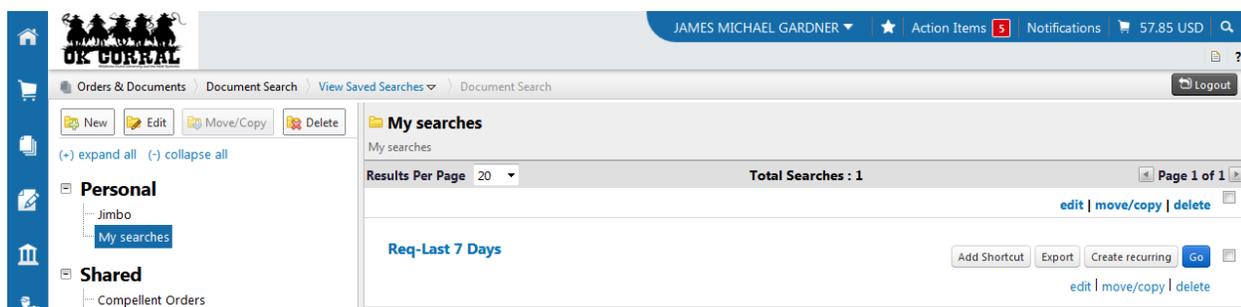
13. To access your new saved search navigate to the main Document Search page by hovering over the "Orders & Documents" icon on the left hand navigation bar. This will open the fly-out menu for "Orders & Documents".



14. Hover over "Document Search" and then select and click "View Saved Searches" on the right-hand side of the "Orders & Documents" menu.



15. This will open the "Saved Searches" page and if you select the newly created folder "My searches" you will see the search "Req-Last 7 Days" in the list of searches.

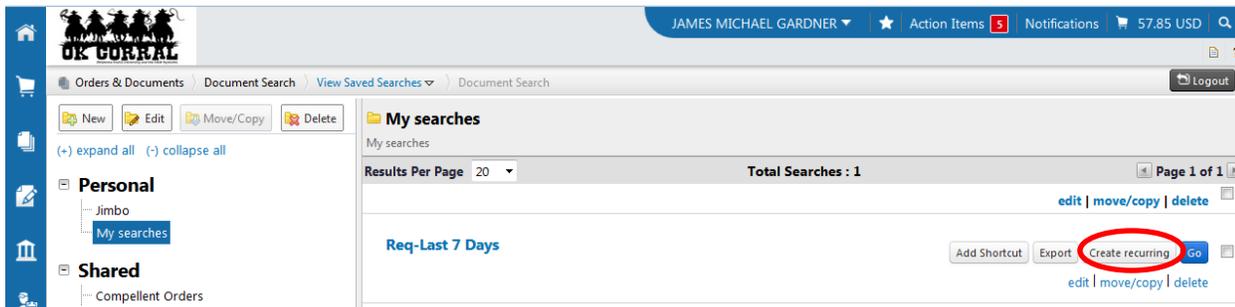


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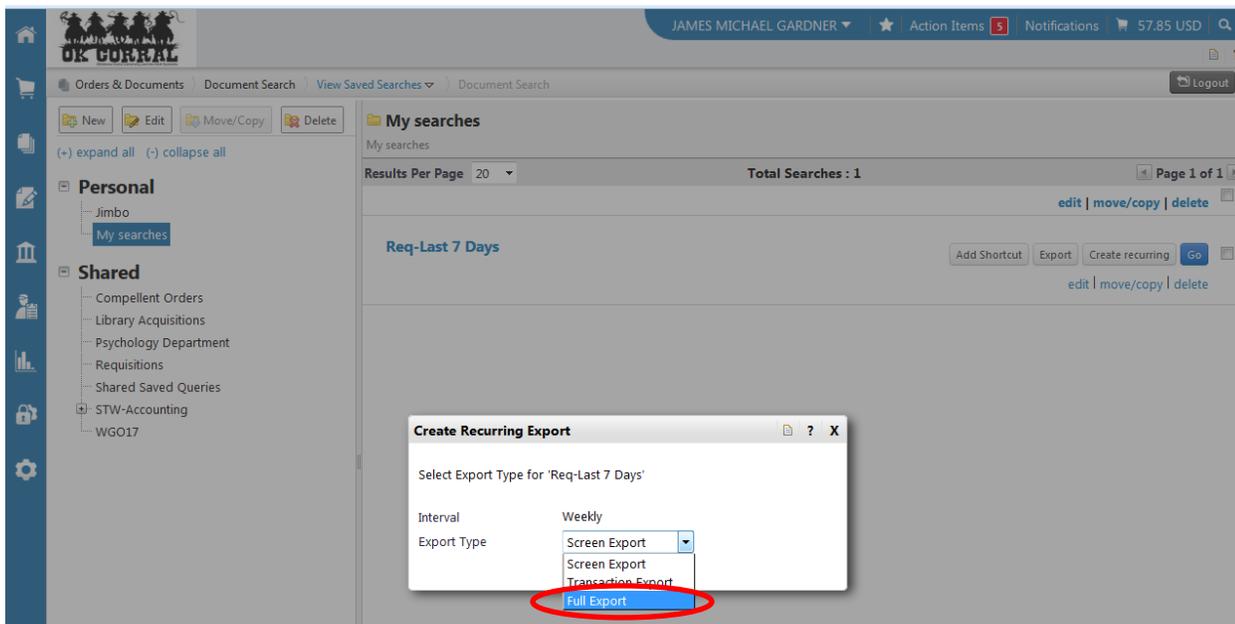
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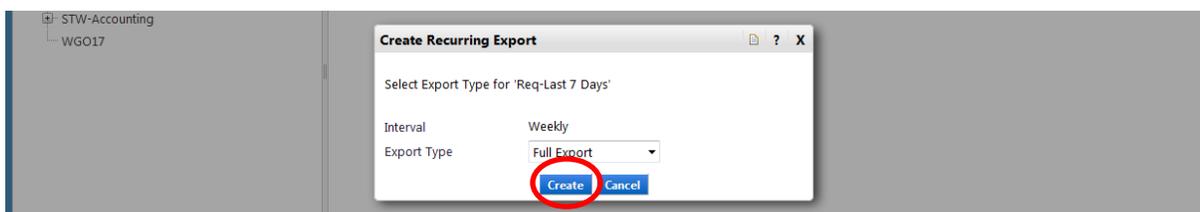
16. To create the recurring report click on the button labeled "Create recurring".



17. A pop-up window will appear titled "Create Recurring Export" which will allow you to select the type of export you'd like your report to appear as. In order to have full functionality with the produced report you will want to select "Full Export" from the drop-down menu.



18. After selecting "Full Export" you can click on the blue "Create" button to create your recurring report.

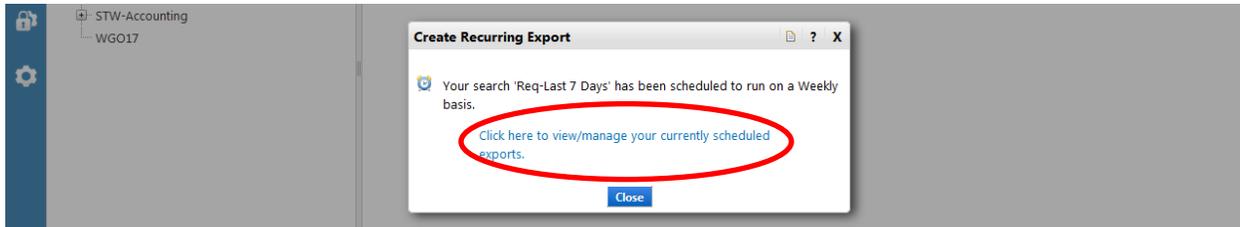


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19. The pop-up window should change to let you know that your recurring search has been scheduled. You can click the link labeled "Click here to view/manage your currently scheduled exports."



20. The "Recurring Exports" page should appear and it should show your scheduled search in the list of "Currently Scheduled Exports".

