

In This Guide

✓ Creating a Recurring Search Report

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.

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١	Orders & Documents Document Search Search Documents Document	nt Search				D Logout	t
	Go to: sim	ple search my requisitions	my purchase orders my invoices				
1	Search Requisitions			simple search	1		
2		G	2	Simple Scale			E
ŵ	Requisition Identification						
ш.	Requisition Number(s)						
Ð.,	Requisition Name						
	Requisition Information						
lile.	Participant(s)			م			
	Prepared For			م			
₽ ₽	Prepared By			م			
	Approved By			م			
•	Date	Submit Date	✓ All Dates				
	Total Amount		All Dates				
	Supplier		Custom Date Range	م			
	Department		Days	م			
	Department		Last 30 days				
	Item/Product Information		Last 60 days				
	Catalog Number(SKU)		Last 90 days				
	Product Description		Yesterday				
	Commodity Code		Today	م			
	Form Name		Last Week				
	Form Type		Calendar	م			
	Product Flags	Controlled substan	ce				
		🔲 🌢 Green	Last Month				
		🔲 😔 Rad Minor	Previous Year				
		🔲 🛟 Recycled	🗖 🍕 Fiscal				
00		🔲 😪 Toxin	Fiscal Year-To-Date				
	Purchase Order Identificatio	n	Frevious riscai real				



2. 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.

0,	Prepared By			~
	Approved By			Q
•	Date	Submit Date 👻	All Dates 💌	
	Total Amount	•	All Dates 🔺	
	Supplier		Custom Date Range	م
	Department		Last 7 days	م
	Item/Product Information		Last 30 days Last 60 days	
	Catalog Number(SKU)		Last 90 days	
	Product Description		Yesterday	
	Commodity Code		Today	م
	Form Name			
	Form Type		Calendar	Q
	Product Flags	🔲 🛱 Controlled substance 🔲 🖡	Month-To-Date	

3. 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.

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١	Orders & Documents Document Search Search Documents	> Document Search			DLogout
	Search Requisiti	Go to: simple search my requisitions my purchase orders my invoices	simple search		
6		Go			E
血	Requisition Ide Requisition No	tification mber(s)			
1	Requisition Na				

4. 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.

ñ	ALAULAULANALAU DK CORRELAL			JAMES MICHAEL GARDNER 🔻	🗙 Action Items S	Notifications 🍹	57.85 USD 🔍		
	Orders & Documents > Document Search	$ \rangle$ Search Documents $ imes$	 Document Search 				🔁 Logout		
	Start New Search Edit Search								
	Showing 1 - 200 of 686 Results			Last Week (8/31/2014-9/6/201	Last Week (8/31/2014-9/6/2014)				
4	Filtered by	Results Per Page 20	00 🔻	Sort by: Best match			🕶 of 4 🕨 🗈 📍		
	Type: Requisitions Date Type: Submit Date	Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total		
血	Date Range: Last Week	✓ 53944212 🔍	Staples	2014-09-05 jamlamb 01	Jamey Lamb	9/5/2014 5:18 PM	85.77 USD		
	Save Search Export Search	🗸 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		
<u>u.</u>	L. Refine Search Results P ? Type	🗸 53941116 🗟 🕅	CSGS	2014-09-05 mpenny 01 CSGS 2015 MEMBERSHIP DUES	JENNIFER A MYRICK	9/5/2014 4:35 PM	150.00 USD		
₽ ₽	Requisitions •	🗸 53942788 🗟 🕅	L&M OFFICE FURNITURE	2014-09-05 L&M	CHARYL LYNN TURNER	9/5/2014 4:34 PM	80.00 USD		



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.

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	Orders & Documents > Document Search	:h $ ightarrow$ Search Documents $ imes$	Document Search				D Logout
	Start New Search Edit Search						
		Showing 1 - 200 of 60	86 Results	Last Week (8/31/2014-9/6/2014	4)		
	Filtered by	Results Per Page 20	00 🔻	Sort by: Best match		Page 1	• of 4 🕨 🗎 📍
	Type: Requisitions Date Type: Submit Date	Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
≞	Date Range: Last Week	✓ 53944212 🗟	Staples	2014-09-05 jamlamb 01	Jamey Lamb	9/5/2014 5:18 PM	85.77 USD
2	Save Search Export Search	✓ 53930935 🗟 Û	FIA CARD SERVICES NTL ASSOC	Sahlu - Kenya Scholars	TILAHUN SAHLU	9/5/2014 4:57 PM	3,385.20 USD
		✓ 53938569 <a>A	Staples	M Hamilton Supplies	NICOLE Y STANLEY	9/5/2014 4:35 PM	10.02 USD
<u>ll.</u>	Refine Search Results P ?	✓ 53941116 🗟 Û	CSGS	2014-09-05 mpenny 01 CSGS 2015 MEMBERSHIP DUES	JENNIFER A MYRICK	9/5/2014 4:35 PM	150.00 USD
e);	Requisitions 🔻	🗸 53942788 🗟 🕅	L&M OFFICE FURNITURE	2014-09-05 L&M	CHARYL LYNN TURNER	9/5/2014 4:34 PM	80.00 USD
	Date Range	· roomere 🖻		**		0/5/0014 4:07 014	FC7 00 LICD

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

.	Filtered by	Results Per Page 200 - Sort by: Best match	•		✓ Page 1	🕶 of 5 🕨 🗈 🤋
	Type: Requisitions Date Type: Submit Date	Add to Saved Searches	D 🖸 ? X	r	Requisition Date/Time	Requisition Total
	Date Range: Last 7 days	Step 1: Edit Saved Document Search Details			8/27/2014 2:49 PM	61.27 US
8	Save Search Export Search	Document Search Nickname		MS	8/27/2014 2:33 PM	152.20 USE
1					8/27/2014 2:32 PM	1,564.47 USC
hl.	Refine Search Results 🗈 ?	Add Description		RNER	8/27/2014 2:29 PM	7,327.00 USE
	Туре	Step 2: Select Destination Folder				
a	Requisitions 💌	R New			8/27/2014 2:27 PM	284.78 USL
	Date Range		·		8/27/2014 2:26 PM	133.40 USE
•	Last 7 days 💌	Personal				
	Workflow Status	odmit	=		8/27/2014 2:22 PM	139,406.94 USE
	Completed (629)	Shared			8/27/2014 2:14 PM	9.30 USE
	Pending (247)	Compellent Orders				
	Withdrawn (20)	Library Acquisitions		ITT	8/2//2014 2:09 PM	67,698.48 USL
		Psychology Department		ORD	8/27/2014 2:01 PM	84.24 USE
	Supplier	Requisitions	-			
	Staples (162)			.E	8/27/2014 2:00 PM	85.10 USE
	Dell (36)	Save Cancel				
	GovConnection (16) [more]	TULSA	cialist U8-27-14 Lisa K Jenkins		8/27/2014 1:58 PM	191.71 USE



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.

×	Type: Requisitions Date Type: Submit Date	Add to Saved Searches	□ ? X	1	Requisition Date/Time	Requisition Total
Ш Ш	Date Range: Last 7 days	Step 1: Edit Saved Document Search Details			8/27/2014 2:49 PM	61.27 USD
a	Save Search Export Search	Document Search Nickname		MS	8/27/2014 2:33 PM	152.20 USD
4		Req-Last 7 Days			8/27/2014 2:32 PM	1,564.47 USD
La I	Refine Search Results 2	Add Description		RNER	8/27/2014 2:29 PM	7,327.00 USD
ш.	Туре	Step 2: Select Destination Folder				
ക	Requisitions 👻	😰 New			8/27/2014 2:27 PM	284.78 USD
	Date Range		^		8/27/2014 2:26 PM	133.40 USD
~	Last 7 days	Personal				

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.

	Type: Requisitions Date Type: Submit Date	Add to Saved Searches	D 2 ?	x	Requisition Date/Time	Requisition Total
Ē	Date Range: Last 7 days	Step 1: Edit Saved Document Search Details			8/27/2014 2:49 PM	61.27 USD
	Save Search Export Search	Document Search Nickname		MS	8/27/2014 2:33 PM	152.20 USD
1		Req-Last 7 Days			8/27/2014 2:32 PM	1,564.47 USD
1.0	Refine Search Results 2	Add Description		RNE	R 8/27/2014 2:29 PM	7,327.00 USD
<u>lh.</u>	Туре	Step 2: Select Destination Folder		- 84		
_	Requisitions	Rev New		- 84	8/27/2014 2:27 PM	284.78 USD
0,	Date Range	Personal		^	8/27/2014 2:26 PM	133.40 USD

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".

	Type: Requisitions Date Type: Submit Date	Add to Saved Searches	x	Requisition Date/Time	Requisition Total
Ê	Date Range: Last 7 days	Step 1: Edit Saved Document Search Details		8/27/2014 2:49 PM	61.27 USD
ຣ	Save Search Export Search	Document Search Nickname	MS	8/27/2014 2:33 PM	152.20 USD
1		Req-Last 7 Days		8/27/2014 2:32 PM	1,564.47 USD
La I	Refine Search Results 📄 ?	Add Description	RNER	8/27/2014 2:29 PM	7,327.00 USD
<u>.</u>	Туре	Step 2: Select Destination Folder			
Ah	Requisitions 👻	R New		8/27/2014 2:27 PM	284.78 USD
.	Date Range	Top level personal folder		8/27/2014 2:26 PM	133.40 USD
Ÿ	Workflow Status			8/27/2014 2:22 PM	139,406.94 USD



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.

	Refine Search Results 0 2	Add Description	Add Description					RNER	8/27/2014 2:29 PM	7,327.00 USD
<u>u.</u>	Туре	Step 2: Selec Create	New Pers	onal Favorites Folder		? X				
0	Requisitions	New Na	ame	My searches					8/27/2014 2:27 PM	284.78 USD
01	Date Range	De	escription	My searches			-		8/27/2014 2:26 PM	133.40 USD
	Last 7 days 💌	Persc								
Ť	Workflow Status	Jimb					-		8/27/2014 2:22 PM	139,406.94 USD
	Completed (629)	🗉 Share		243 characters remaining	expand clea	ar	-		8/27/2014 2:14 PM	9.30 USD
	Pending (247)	- Com								
	Withdrawn (20)	Libra		Save Cancel				lff	8/27/2014 2:09 PM	67,698.48 USD
	Rejected (10)	Psychology De	epartment					ORD	8/27/2014 2:01 PM	84 24 USD

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.

	Type: Requisitions Date Type: Submit Date	Add to Saved Searches		? X	r	Requisition Date/Time	Requisition Total
血	Date Range: Last 7 days	Step 1: Edit Saved Document Search Details				8/27/2014 2:49 PM	61.27 USD
~	Save Search Export Search	Document Search Nickname			MS	8/27/2014 2:33 PM	152.20 USD
Ă		Req-Last 7 Days				8/27/2014 2:32 PM	1,564.47 USD
	Refine Search Results ?	Add Description			RNER	8/27/2014 2:29 PM	7,327.00 USD
<u>lh.</u>	Type	Step 2: Select Destination Folder					
a	Requisitions •	B New				8/27/2014 2:27 PM	284.78 USD
	Date Range	Demonstel		^	¢	8/27/2014 2:26 PM	133.40 USD
	Last 7 days 🔹	Personal					
	Workflow Status	My searches		=		8/27/2014 2:22 PM	139,406.94 USD
	Completed (629)					8/27/2014 2:14 PM	9.30 USD
	Pending (247)	Shared					
	Withdrawn (20)	Compellent Orders			lff	8/27/2014 2:09 PM	67,698.48 USD
	Rejected (10)	- Library Acquisitions			ORD	8/27/2014 2:01 PM	84.24 USD
	Supplier 🌾	Psychology Department					
	Staples (162)				LE	8/27/2014 2:00 PM	85.10 USD
	PURCHASING DEPARTMENT (62)	Save Cancel					
	Dell (36)	55051242 - C EAR NOSE & THRUAT SPECIFICATIONSE and Throat Specialist U8-27-14	usa k Jen	kins		8/27/2014 1:58 PM	191.71 USD

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.

	Туре	CERETRON B CONCOMPANY LLC 2014 02 25 and row 01/		27/2014 2:27 DM 294 79 LH	CD I
8 3	Requisitions 💌	Add to Saved Searches	□ ? X	17/2014 2.27 PW 204.78 0.	
	Date Range	You have successfully saved your search 'Req-Las	t 7 Days' 8/	27/2014 2:26 PM 133.40 US	SD
•	Last 7 days 👻				
-	Workflow Status	Close	8/	27/2014 2:22 PM 139,406.94 US	ŝD
	Completed (629)	🔊 53652716 🔍 Staples File tabs for Tabitha	TABITHA MARIE 8/	27/2014 2:14 PM 9.30 US	SD



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".

ñ	DK GORTAL		JAMES MICHAEL GARDNER 🔻 🖌 Action Items 🛐 Notifications	🗎 57.85 USD 🔍 🔶
)) Shop \rangle Shopping \rangle Dashboard \rangle	Shopping Home 〉 Home/Shop		🗂 Logout
	Orders & Documents		Go	
-	Document Search	Document Search Search Documents	Browse: suppliers categories contracts chemicals	
	Approvals	View Saved Searches		[Manage Showcases]
血		Download Export Files		E 1
2	computer or network must be code appropriate "data processing" acce Examples:	d under the Contract #: OS-112660-JAB CONTRAC	T ≑: 96ADV	
₩	 If a copier is a multi-function performs scanning, faxing, e lease charge should be code 	al copier (also tc.), the rental or ad as subcode 8065	1 <u> </u>	• ?

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

ñ			JAMI	es Michael Gardner 🔻	*	Action Items 3	Notifications	📜 57.85 USD) Q]
1	Shop > Shopping > Dashboard >	Shopping Home > Home/Shop						10	ogout
	Orders & Documents					Go			
->	Document Search	Document Search		Browse: suppliers categori	es cont	racts chemicals			
	Approvals	View Saved Searches						[Manage Sh	owcases]
Î		Download Export Files						1	2
2	ay stema or assume to paperneme	Contract #		J					

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.

ñ			JAMES MICHAEL GARDNER 🔻	🛉 🖈 🛛 Action Items 🚺	Notifications 🎽 57.85 USD 🔍
	OK CORRAL				₽ ?
1	In the constant of the consta	ved Searches			🔁 Logout
	🔯 New 😥 Edit 🔯 Move/Copy 😫 Delete	😑 My searches			
	(+) expand all (-) collapse all	My searches			
	Percenal	Results Per Page 20 -	Total Searches : 1		🔳 Page 1 of 1 🕨
1 D					edit move/copy delete 🔲
	My searches				
血	My searches	Req-Last 7 Days		Add Shortcu	t Export Create recurring Go 🔲
	Shared				edit move/conv delete
2	Compellent Orders				cult more/copy ruciete



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

ñ			JAMES MICHAEL GARDNER 🔻	🛧 Action Items 5	Notifications 🍹 57.85 USD 🔍
	OK CORRAL				₿ ?
1	Orders & Documents > Document Search > View Search > Vi	wed Searches 🗢 👌 Document Search			🔁 Logout
	🄯 New 🔀 Edit 🔯 Move/Copy 🔯 Delete	🗀 My searches			
	(+) expand all (-) collapse all	My searches			
		Results Per Page 20 -	Total Searches : 1		🔳 Page 1 of 1 📐
1	Personal Jimbo				edit move/copy delete 🔲
•	My searches	Regulast 7 Days			
ш	Chaved	Req-cust 7 Duys		Add Shortcu	Export Create recurring Go
					edit move/copy delete
2	Compellent Orders				

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.

ñ	A FARMER AND AN AND AN A RANGE AND		JAMES MICHAEL GARDNER 🔻	★ 🛛 Action Items 🛐 🔹 Notifications 🛛 🐂 57.85 USD 🗠 🔍
	OK COBRAL Orders & Documents > Document Search > View Sa	ved Searches 🗢 〉 Document Search		Cogout
•••	New Edit Move/Copy Relete	My searches		
	(+) expand all (-) collapse all Personal	Results Per Page 20 -	Total Searches : 1	edit move/copy delete
Â	My searches	Req-Last 7 Days		Add Shortcut Export Create recurring Go
	Compellent Orders Library Acquisitions			edit move/copy delete
<u>u.</u>	 Psychology Department Requisitions Shared Saved Oueries 			
6);	G STW-Accounting WG017	Create Recurring Export	₽ ? X	
٥		Select Export Type for 'Req-Last 7 Days'		
		Interval Weekly Export Type Screen Export Screen Export Transaction E Full Export	i v	
		Pull Export		

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

STW-Accounting WG017	Create Recurring	Export	□ ? X
	Select Export Type	for 'Req-Last 7 Days'	
	Interval	Weekly	
	Export Type	Full Export	
		Create	



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."

	STW-Accounting	
	WGO17	Create Recurring Export
٥		 Vour search 'Req-Last 7 Days' has been scheduled to run on a Weekly basis. 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".

ñ	ALLANDAR ALLAND	JAMES MICHAEL GARD	NER 🔻 🛛 ★ 🛛 Action Items 🗧	5 Notifications 🍹 57.85 USD 🔍		
È	\blacksquare Orders & Documents \rangle Document Search \rangle Download Export Files $m{ au}$			🔁 Logout		
	Download Exports Recurring Exports			D ?		
-	Would you like to enhance this feature: "Recurring Exports"? We are lo improvements we can make and reference "Recurring Exports". The curre	oking for your direct feedback as we better understand you ntly supported document search date ranges are listed belo	r needs. Please talk to your syste w.	em administrator if there are		
血	 Last Week - (Sunday-Saturday) or the previous week Last Month - Last calendar month 					
4	Create from saved search Create new search					
<u>16.</u>	show schedule details					
	Currently Scheduled Exports			2		
₽ ≯	Description	Export Type	Interval	A Share		
	Req-Last 7 Days	Full Export	Weekly	Delete		
\$						