SHOPBLUE

Setting Up a Recurring Report

A Note to Start: Saved search exports can be scheduled to recur in ShopBlue. However, only saved searches that use the data range of Last Month or Last Week are eligible.

- 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.

1. After logging into ShopBlue, go to the **Documents** tab on the left, and in the **Document Search** section of the fly-out menu, click **Search Documents** (Figure 1).
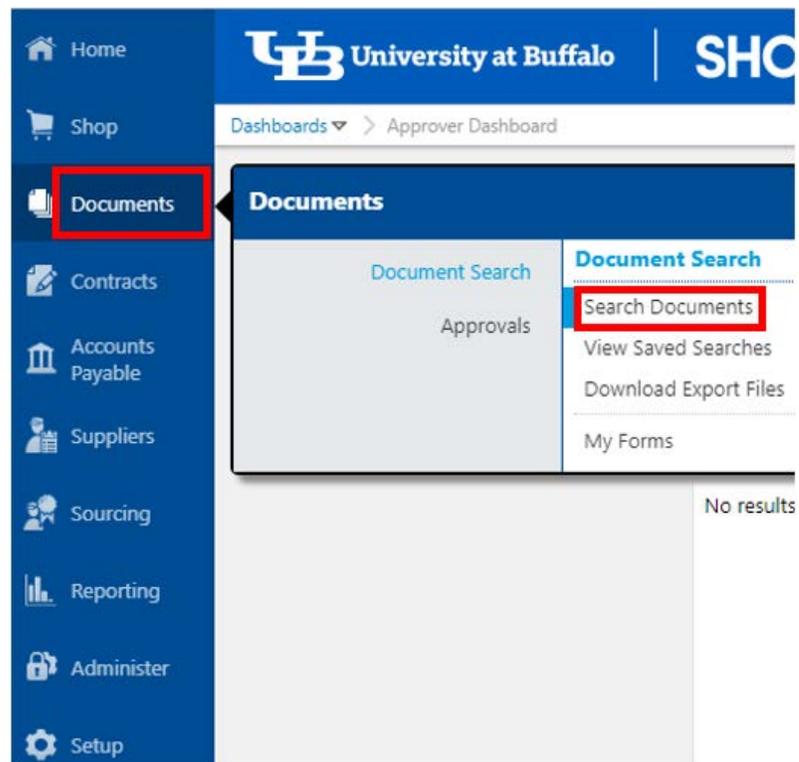

Figure 1

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2. When the search screen comes up, it may be in the simple search format. Click the "advanced search" link under the blank field (Figure 2).

Figure 2

Next, choose the document type you'd like to search for, and any other fields you'd like to filter by. In this example, we are searching for all purchase orders prepared by Dalton Holler over the last month (Figure 3).

Figure 3

3. Next, you'll want to save this report. To save, click **Save New Search** (Figure 4).
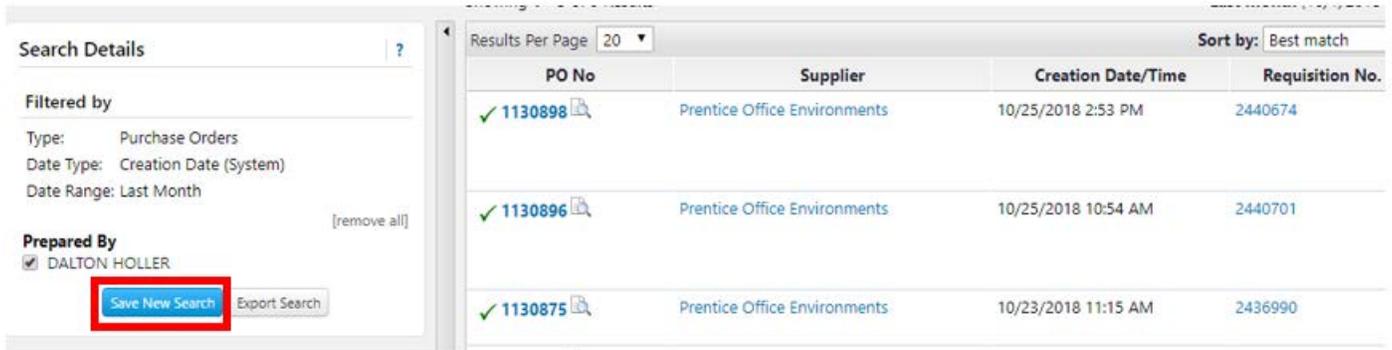

Figure 4

4. Next, you will give your search a name. You will need to have a folder under your **Personal Favorites** in order to be able to save your search. If you don't have one, click **Add New**, select **Top Level personal folder** in the dropdown, and name your folder. Then, under **Step 3,** click **Yes** to set up a recurring export. Next, you will choose what type of export you'd like:

- **Screen Export –** exports only the information available in the search results screen for each document
- **Transaction Export –** exports an expanded set of information on the documents
- **Full Export – e**xports transactions with history

In this example, we are selecting a full export from the dropdown. When you have named your folder and your search, and selected your export type, click **Save** (Figure 5).
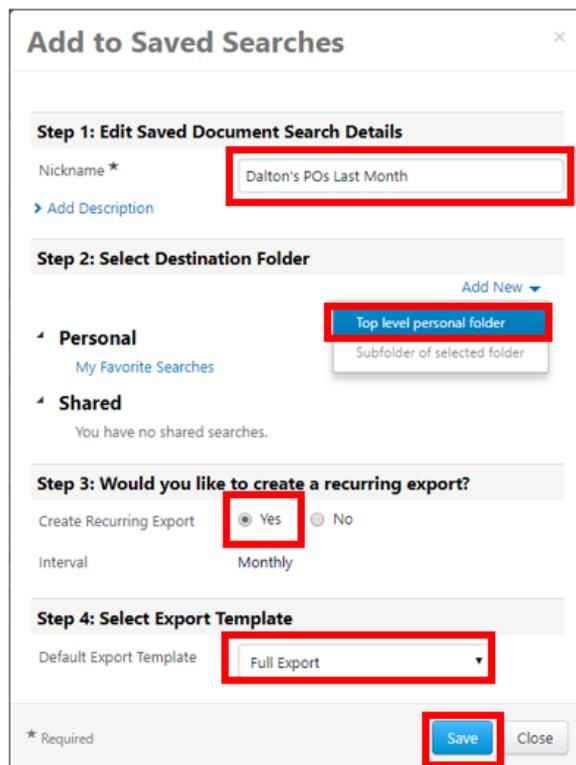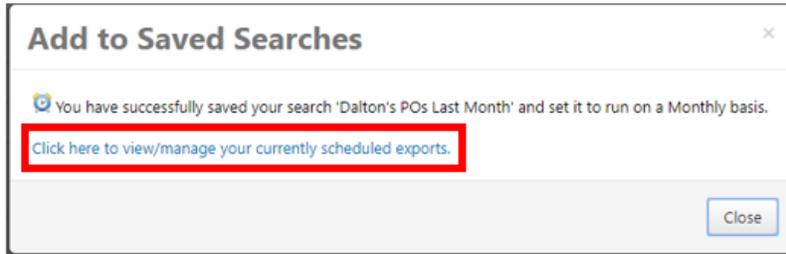

Figure 5

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5. Next, you will be told that you have successfully set up your search to recur. To view your search export, click the blue link in the in the window. Next, ShopBlue will show you the recurring export you just created (Figure 6).

Add to Saved Searches   ×

 You have successfully saved your search 'Dalton's POs Last Month' and set it to run on a Monthly basis.

Click here to view/manage your currently scheduled exports.

Close

Currently Scheduled Exports			
Description	Export Type	Interval	Action
Dalton's POs Last Month	Full Export	Monthly	Delete

Figure 6

6. Next, after the month has ended and it is time to view your export, go to the **Documents** section on the left, and in the **Document Search** section of the fly-out menu, click on **Download Export Files.** Next, click on the File Name of your recurring search to view the export files (Figure 7).
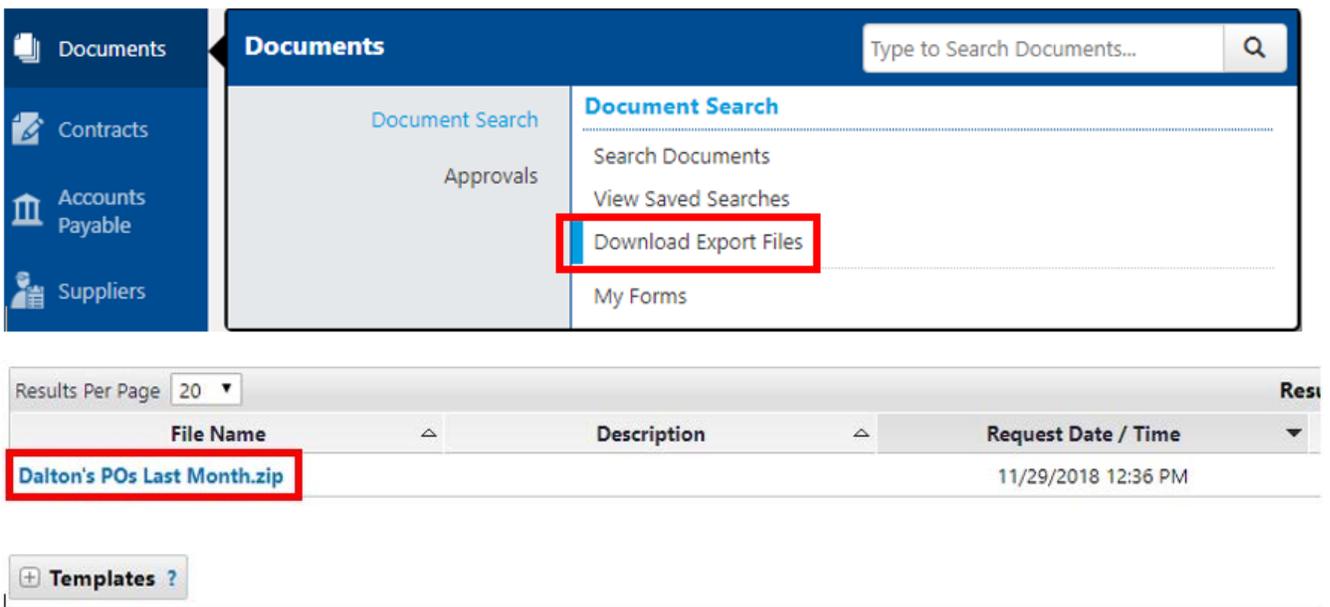
Documents	**Documents**		Type to Search Documents...	Q
Contracts	Document Search	**Document Search**		
Accounts Payable	Approvals	Search Documents		
Suppliers		View Saved Searches		
		Download Export Files		
		My Forms		

Results Per Page 20 ▼   Resu

File Name	△	Description	△	Request Date / Time	▼
Dalton's POs Last Month.zip				11/29/2018 12:36 PM	

⊕ Templates ?

Figure 7