Enhanced Order Search

Revised 6/4/2023
Enhanced Order Search

- UD Exchange offers an enhanced order search for looking up and researching orders.
- Searches can be filtered and customized in numerous ways to fit your needs.
- Filters can be saved for future use each time you use the tool.
- Multiple customized searches can be saved for use any time.
- Searches can be exported to Excel for additional analysis and reporting offline.
On the home page, navigate to Orders > Search > All Orders.
When you first select this option, you’re given a pop-up that offers you a step-by-step tour and/or an instructional video.
On the **Search All Orders** screen, you can proceed with:

- **Quick Filters**, which will give you fast access to frequently used choices
- Or you can begin a customized search by using the **menus** above the search results
  - The first tab gives you the choice of all or specific **Types of Orders**
Choose a **Created Date** range from the menu, or enter it manually.

- **Click Apply**
Use the **Add Filter** to add one or more additional filters.
Clicking on Setup (the gear icon) opens the Configure Column Display, which allows you to:

1. Select additional columns for data fields in your search report
2. Change the order of the columns to fit your needs

When complete, select Apply.

If you ALWAYS want to see these columns in any search, click “Pin Columns as my Defaults”
Example

• For this example, a report will be created with the following attributes:
  – A new filter for Departments
  – A new column for the Dept ID
  – POs only
  – Created in the last week
  – For W W Grainger, Inc., only
  – An exported report for use in Excel
1. Using the **Add Filter** dropdown, a new **filter** was added for Departments.

2. Using the **Setup** icon to access the **Configure Column Display** window, a new **column** was added for Department.

Note that in UDX “**Department**” means the HR department affiliated with the “Prepared For” employee’s ID number, and “**Dept**” means the department number that owns the SpeedType used to fund the order.
To keep these changes for future use, you have the option to select Pin Filters and/or Pin Columns.
Choosing either option brings up a **Confirmation** window.

Select **Yes**.
To eliminate the changes you made to the pinned filters or columns, use the **Pin Filters** menu to select **Remove** for either, or both, options and confirm your selection in the pop-up.
For this example:

1. In the **Type of Order** menu, **Purchase Order** was selected
2. In the **Created Date** menu, **All** was selected
3. In the **Department** menu, **Facilities (05805)** was selected
4. Grainger was typed into the **Quick Search** field and the **magnifying glass** was clicked to apply **Grainger** as a filter.
5. The report can now be saved using the **Save As** menu.
In the **Save Search** window:

1. **Name** your search.
2. Choose a **destination folder** to save it in.
3. If you do not have a folder, or need to create a new one, select **Add New** and choose a **Top-level folder**, or a **subfolder**.
In the **Create Personal Folder** window:

1. Enter a **name** for the folder
2. Enter a **description** (optional)
3. Select **Save Changes**
Once a search is saved, it can be accessed and edited:
1. Select the **Save As** menu
2. Select **Manage Searches**

Your saved searches are also easily accessible from “My Searches” in the Quick Filters menu.
The Manage Searches screen offers the following:

1. Saved search folders (Personal and Shared)

2. Saved searches
   a) Edit, move, copy or delete searches by selecting the desired link
   b) Run a search by selecting Go (proceed to Slide 18 for further instructions)
   c) Export a search by selecting Export (proceed to Slide 19 for further instructions)
Running a search by selecting Go on the Manage Searches page will display a results page.

If the report needs to be exported to Excel:
1. Select the Export All drop-down menu
2. Either select Export All or Export Selected Rows if you have…
3. …checked boxes to select specific rows you need.
In the Export window, enter a **Title** for the report to be generated. Click **Submit**.
After submitting the export, you'll return to the search results page. A **Success message** will appear to let you know the export has been created. Select **Manage Search Exports** on the pop-up or from the Export All menu.
The **Manage Exports** page is where all saved exports are available to:

1. **Download** by selecting the **link** with the export name.
2. **Delete** by selecting the **Delete** button.

<table>
<thead>
<tr>
<th>Title</th>
<th>Status</th>
<th>Search Type</th>
<th>Export Output</th>
<th>Created</th>
<th>Completed</th>
<th>Available Until</th>
<th>Details</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export request for All Orders</td>
<td>Completed</td>
<td>All Orders</td>
<td>Screen Layout (Excel)</td>
<td>8/23/2021 7:12:29 AM</td>
<td>8/23/2021 7:12:34 AM</td>
<td>8/30/2021</td>
<td>Total Records: 13</td>
<td>Delete</td>
</tr>
</tbody>
</table>
Downloaded exports are available for further analysis in Excel.

Please note the export attributes, which are identical to the example search in UDX:

1. Search Criteria
2. Report columns
Other Types of Enhanced Searches

• The ability to customize and save searches, filters, and exports, allows for efficient research and analysis within UDX.

• Enhanced Search functionality applies to any documents you have access to in your department: purchase orders, change requests, vouchers, receipts, procurement forms (such as the UDX Access Request form), and approvals you have completed.

• In all cases, searches are accessed from the **Orders>Search** menu, and your saved searches relate to that type of search (e.g., you won’t find a saved PO search in your Requisitions searches).
Questions:
• procurement@udel.edu

Resources:
• Procurement Services Website
• Understanding Access in UD Exchange