Enhanced Order Search

- UD Exchange offers an excellent search tool 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
Access this search feature from the Menu using:
1. Orders
2. Search
3. All Orders
When you first select this option, you’re given a pop-up that allows you to take a step-by-step tour and/or an instructional video.

Whatever choices you make, this slide deck will pick up on the next screen.
When you arrive at the Search All Orders screen, you can proceed with

1. **Quick Filters**, which will give you fast access to the most used choices in the pre-arranged categories

Or, you can begin a customized search by using the tabs above the display window

2. The first tab gives you the choice of any or all **Types of Orders**
Continuing with the tabs, you can
1. Choose a *Created Date* range, which can be chosen from a list, or entered manually.
2. Upon completion, click Apply
Continuing with the tabs, you can

1. Choose **Add Filter**, which allows you to add one or more additional filters
1. Clicking on **Setup** (the gear icon) opens the **Configure Column Display**, which allows you to
2. Select **additional columns** for data fields in your search report
3. Change the **order of the columns** to fit your needs
4. 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,
2. A new filter was added for Department
3. Using the Setup button to access the Configure Column Display window,
4. A new column was added for Dept

Note that “Department” is affiliated with the “Prepared For” employee’s ID number, and “Dept” relates to the number used by the speedtype.
To keep these changes for future use, you have the option to:
1. Select Pin Filters and/or Pin Columns
Choosing each option brings up a Confirmation window.

1. Select **Yes**
If you wish to eliminate changes to the pinned filters or columns, you simply:

1. Select **Remove** for either, or both, options and confirm your selection in the pop-up.

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<table>
<thead>
<tr>
<th>Supplier</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>W W GRAINGER INC</td>
<td>83,400.00 USD</td>
</tr>
<tr>
<td>W W GRAINGER INC</td>
<td>184.00 USD</td>
</tr>
<tr>
<td>TR-M GROUP LLC</td>
<td>83,400.00 USD</td>
</tr>
<tr>
<td>TITUS COMPANY INC</td>
<td>11,164.00 USD</td>
</tr>
</tbody>
</table>
1. In the **Type of Order** pull-down, **Purchase Order** was selected  
2. In the **Created Date** pull-down, **This Week** was selected  
3. In the **Department** pull-down, **Facilities (05804)** was selected  
4. In the **Quick Search** field, **Grainger** was selected  
5. Selecting the **magnifying glass icon** sets the filter in action  
6. The report can now be **saved** using the **Save As** drop-down
When the Save Search window pops up,
1. Name the search
2. Choose a destination folder
3. If you do not have a folder, or need 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** pull-down menu
2. Select **Manage Searches**

Your saved searches are also easily accessible from “My Searches” in the quick filters area.
The Manage Searches screen offers the following:
1. Saved search folders
2. Saved searches
3. Edit, move, copy or delete searches by selecting the desired link
4. Run a search by selecting Go (see Slide 18)
5. Export a search by selecting Export (see Slide 19)
Running a search (see Slide 17) will take you to this results screen. 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 after
3. Checking boxes next to the needed rows
In the **Export** window that pops up,

1. Enter a **title** for the report to be generated
2. Select **Submit**
After submitting the export, you'll return to the search results page
1. A pop-up will appear to let you know the export has been created
2. Select Manage Search Exports on the pop-up or from the
3. Export All pull-down
The Manage Exports screen is where all saved exports are available for:
1. **Download** by selecting the link with the export name or
2. **Removal** by selecting the Delete button
Downloaded exports are available for further analysis in Excel. Please note the export attributes, which are identical to the search in UDX:
1. Search Criteria
2. Report columns
Enhanced Order Search

- It can be used for more than simply finding an order
- These search features can be a powerful and valuable tool as our use of UD Exchange grows over time
- With the ability to customize and save searches, filters and exports, this will make research and analysis within UDX much easier and more efficient
Other Enhanced Searches

• The same enhanced search functionality applies to purchase orders, change requests, vouchers, receipts, procurement forms (such as the access form) – anything to which you have access for your department.

• You can also save searches related to your approvals.

• 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).
Resources

Procurement Services
procurement@udel.edu
Jaggaer video on Enhanced Search:
https://youtu.be/jIrtxcYRMf4