UNIVERSITY OF DELAWARE EXCHANGE

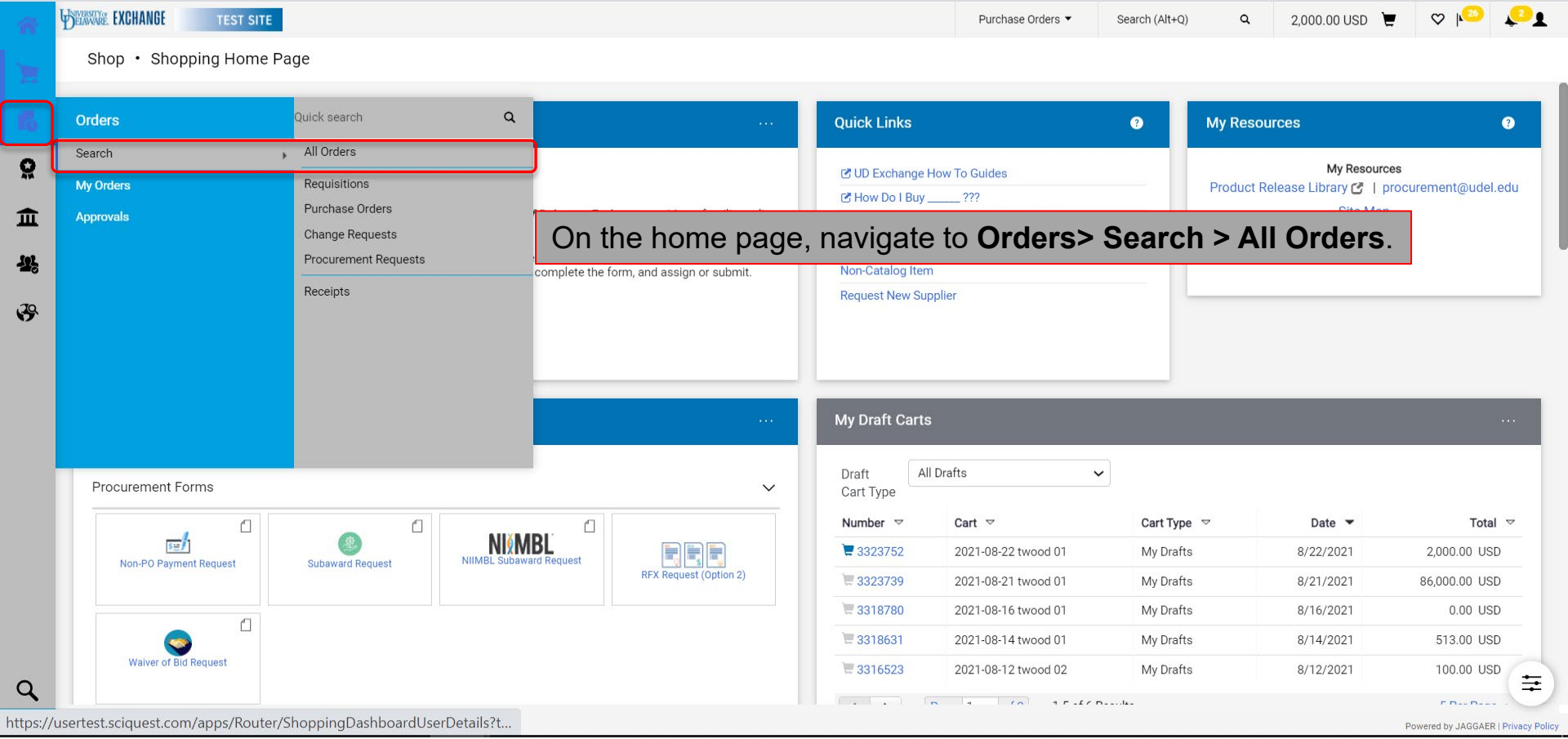
Enhanced Order Search

Revised 6/4/2023

UNIVERSITY OF DELAWARE

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.


UNIVERSITY OF DELAWARE EXCHANGE
TEST SITE
Purchase Orders
Search (Alt+Q)
2,000.00 USD
Shop • Shopping Home Page
Orders
Search
My Orders
Approvals
Quick search
All Orders
Requisitions
Purchase Orders
Change Requests
Procurement Requests
Receipts
Quick Links
UD Exchange How To Guides
How Do I Buy _____ ???
Non-Catalog Item
Request New Supplier
My Resources
My Resources
Product Release Library | procurement@udel.edu
On the home page, navigate to Orders> Search > All Orders.
complete the form, and assign or submit.
Procurement Forms
Non-PO Payment Request
Subaward Request
NIIMBL Subaward Request
RFX Request (Option 2)
Waiver of Bid Request
My Draft Carts
Draft Cart Type
All Drafts
Number
Cart
Cart Type
Date
Total
3323752 2021-08-22 twood 01 My Drafts 8/22/2021 2,000.00 USD
3323739 2021-08-21 twood 01 My Drafts 8/21/2021 86,000.00 USD
3318780 2021-08-16 twood 01 My Drafts 8/16/2021 0.00 USD
3318631 2021-08-14 twood 01 My Drafts 8/14/2021 513.00 USD
3316523 2021-08-12 twood 02 My Drafts 8/12/2021 100.00 USD
https://usertest.sciquest.com/apps/Router/ShoppingDashboardUserDetails?t...
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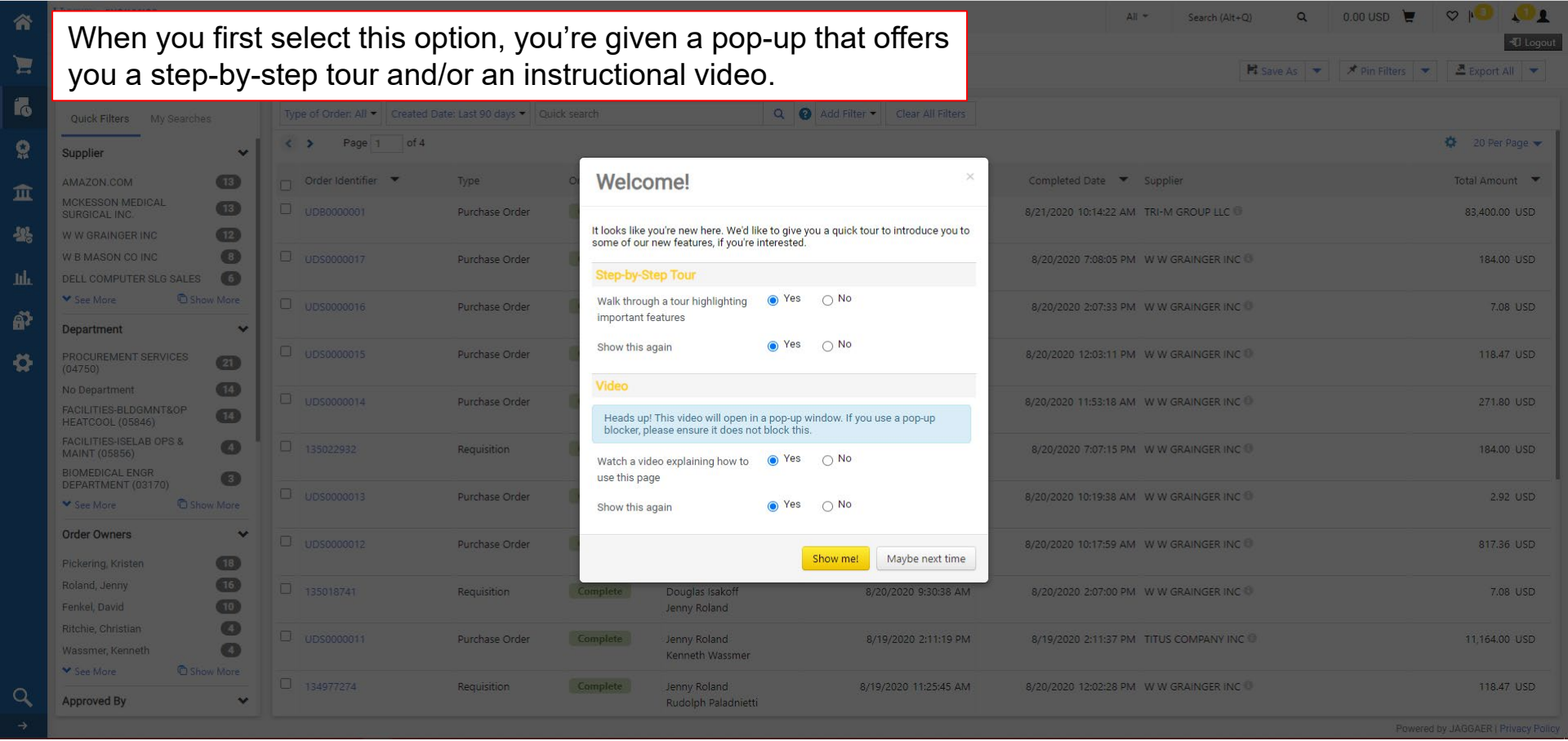
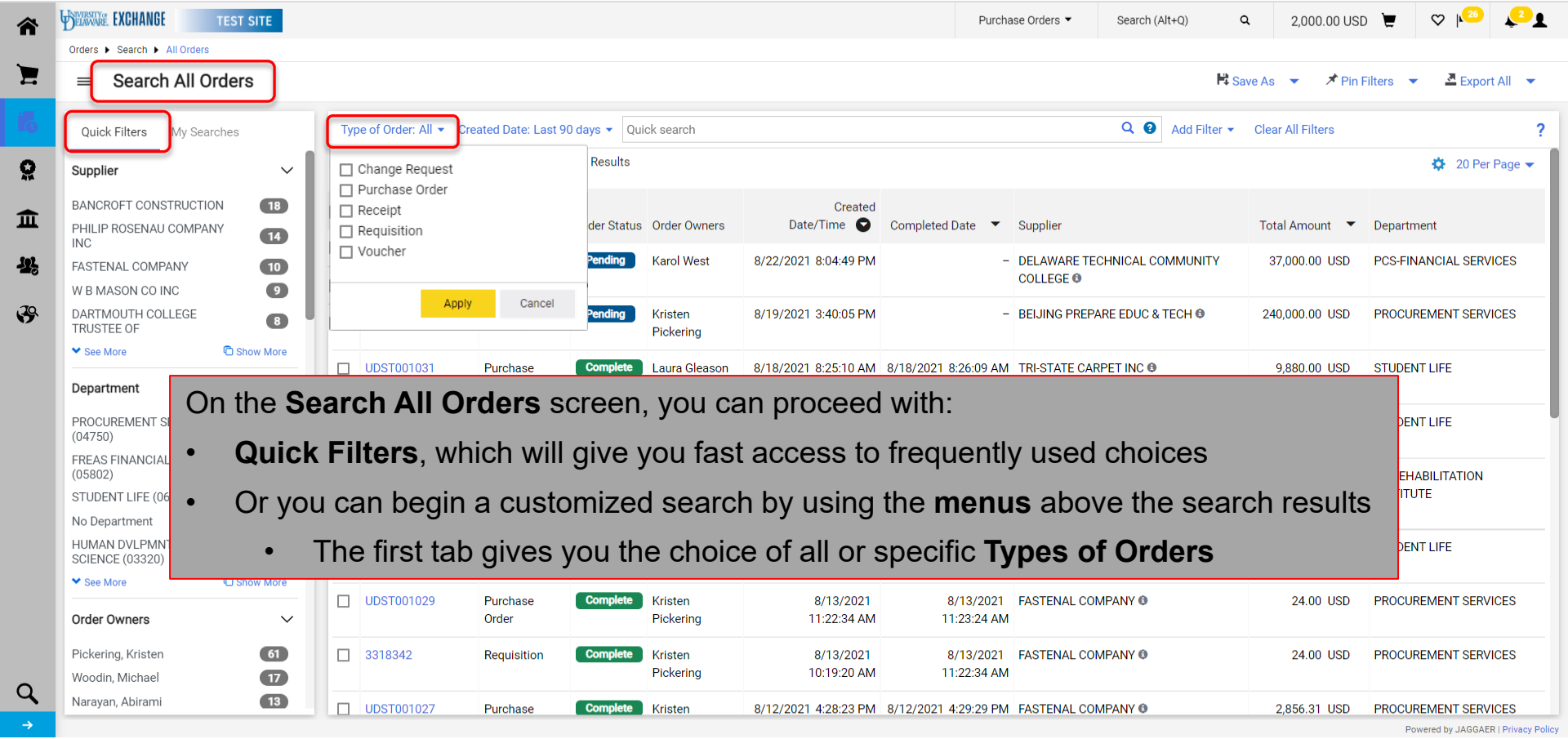
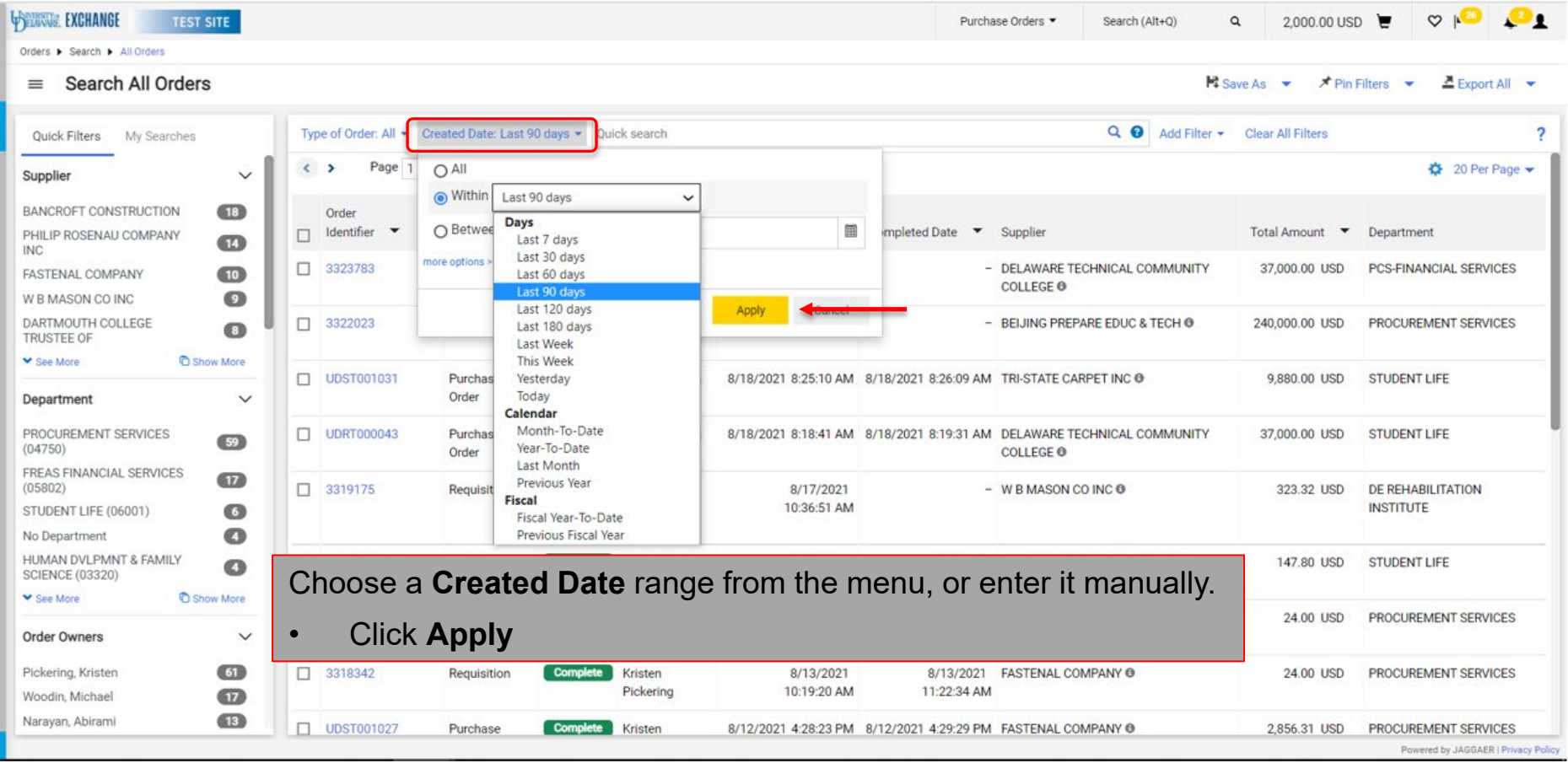
When you first select this option, you're given a pop-up that offers you a step-by-step tour and/or an instructional video.





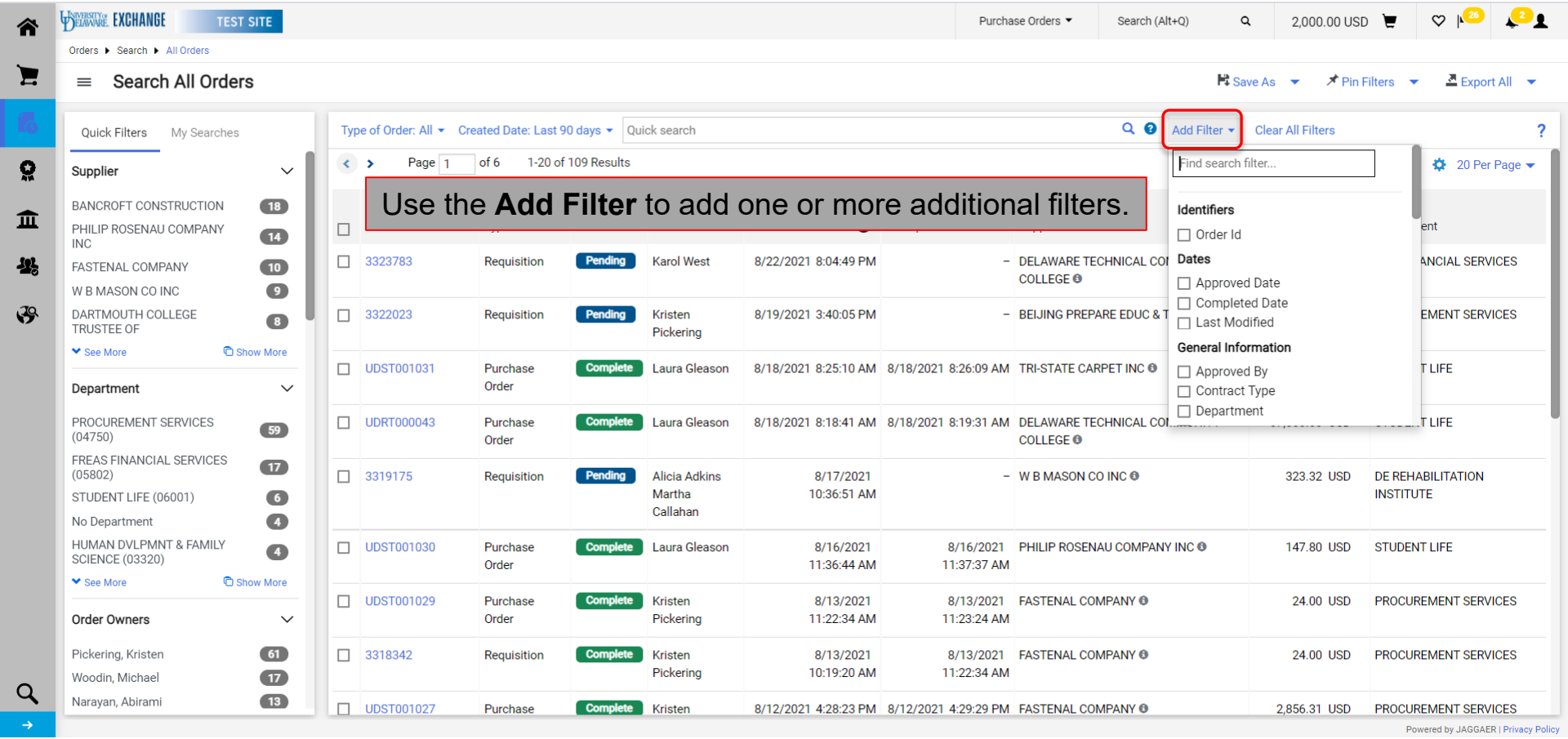
On the **Search All Orders** screen, you can proceed with:

- **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**


EXCHANGE
TEST SITE
Purchase Orders
Search (Alt+Q)
2,000.00 USD
Orders ▸ Search ▸ All Orders
Search All Orders
Save As
Pin Filters
Export All
Quick Filters
My Searches
Supplier
BANCROFT CONSTRUCTION 18
PHILIP ROSENAU COMPANY INC 14
FASTENAL COMPANY 10
W B MASON CO INC 9
DARTMOUTH COLLEGE TRUSTEE OF 8
See More
Show More
Department
PROCUREMENT SERVICES (04750) 59
FREAS FINANCIAL SERVICES (05802) 17
STUDENT LIFE (06001) 6
No Department 4
HUMAN DVLPMNT & FAMILY SCIENCE (03320) 4
See More
Show More
Order Owners
Pickering, Kristen 61
Woodin, Michael 17
Narayan, Abirami 13
Type of Order: All
Created Date: Last 90 days
Quick search
Add Filter
Clear All Filters
Page 1 of 6
1-20 of 109 Results
20 Per Page
Use the Add Filter to add one or more additional filters.
Find search filter...
Identifiers
Order Id
Dates
Approved Date
Completed Date
Last Modified
General Information
Approved By
Contract Type
Department
3323783 Requisition Pending Karol West 8/22/2021 8:04:49 PM – DELAWARE TECHNICAL COLLEGE
3322023 Requisition Pending Kristen Pickering 8/19/2021 3:40:05 PM – BEIJING PREPARE EDUC &
UDST001031 Purchase Order Complete Laura Gleason 8/18/2021 8:25:10 AM 8/18/2021 8:26:09 AM TRI-STATE CARPET INC
UDRT000043 Purchase Order Complete Laura Gleason 8/18/2021 8:18:41 AM 8/18/2021 8:19:31 AM DELAWARE TECHNICAL COLLEGE
3319175 Requisition Pending Alicia Adkins Martha Callahan 8/17/2021 10:36:51 AM – W B MASON CO INC 323.32 USD DE REHABILITATION INSTITUTE
UDST001030 Purchase Order Complete Laura Gleason 8/16/2021 11:36:44 AM 8/16/2021 11:37:37 AM PHILIP ROSENAU COMPANY INC 147.80 USD STUDENT LIFE
UDST001029 Purchase Order Complete Kristen Pickering 8/13/2021 11:22:34 AM 8/13/2021 11:23:24 AM FASTENAL COMPANY 24.00 USD PROCUREMENT SERVICES
3318342 Requisition Complete Kristen Pickering 8/13/2021 10:19:20 AM 8/13/2021 11:22:34 AM FASTENAL COMPANY 24.00 USD PROCUREMENT SERVICES
UDST001027 Purchase Complete Kristen 8/12/2021 4:28:23 PM 8/12/2021 4:29:29 PM FASTENAL COMPANY 2,856.31 USD PROCUREMENT SERVICES
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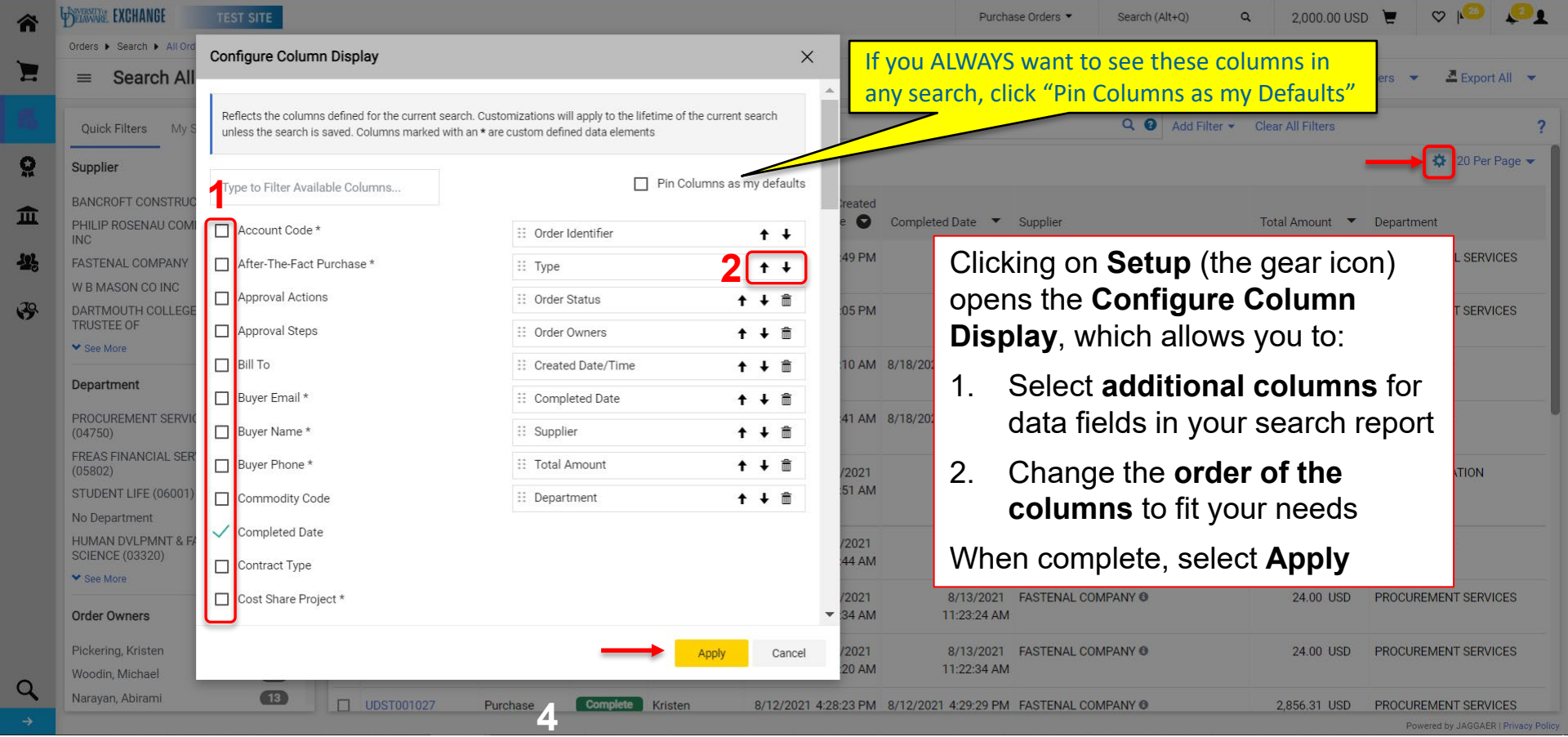
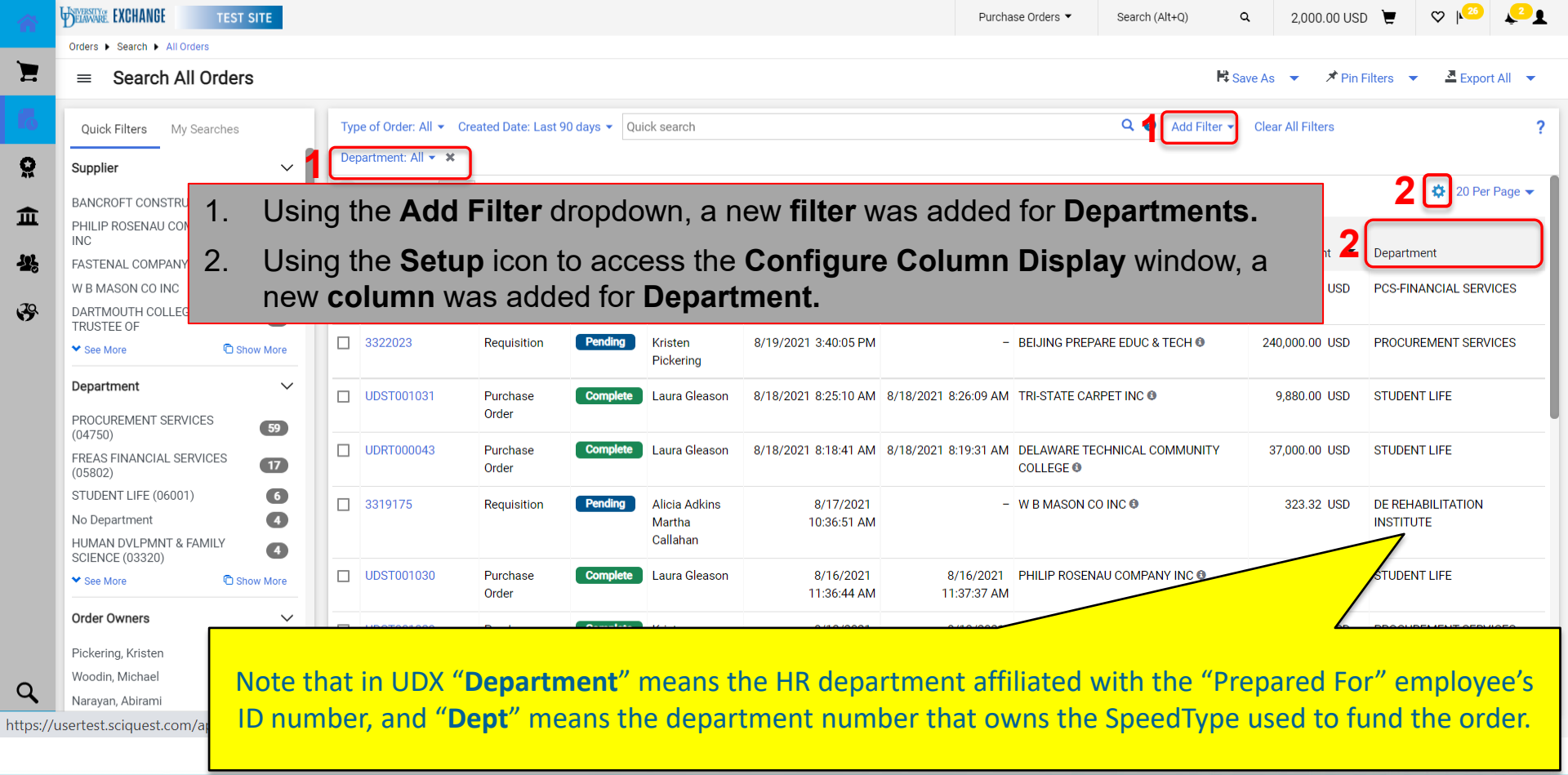
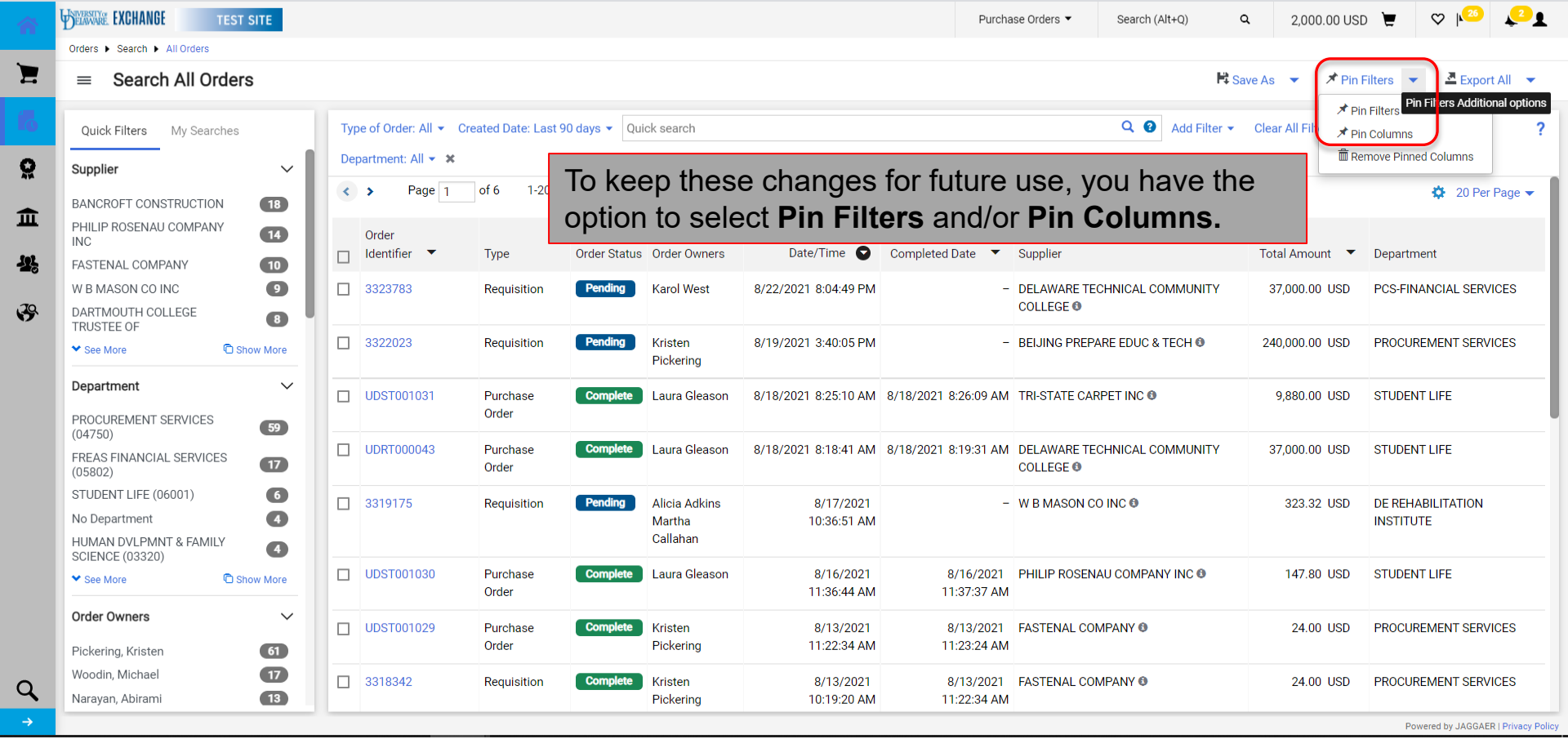

Configure Column Display
Reflects the columns defined for the current search. Customizations will apply to the lifetime of the current search unless the search is saved. Columns marked with an * are custom defined data elements
Type to Filter Available Columns...
Pin Columns as my defaults
Account Code *
After-The-Fact Purchase *
Approval Actions
Approval Steps
Bill To
Buyer Email *
Buyer Name *
Buyer Phone *
Commodity Code
Completed Date
Contract Type
Cost Share Project *
Order Identifier
Type
Order Status
Order Owners
Created Date/Time
Completed Date
Supplier
Total Amount
Department
Apply
Cancel
1
2
4
If you ALWAYS want to see these columns in any search, click “Pin Columns as my Defaults”
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

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


EXCHANGE
TEST SITE
Purchase Orders
Search (Alt+Q)
2,000.00 USD
Orders ▸ Search ▸ All Orders
Search All Orders
Save As
Pin Filters
Export All
Quick Filters
My Searches
Supplier
BANCROFT CONSTRU
PHILIP ROSENAU CO INC
FASTENAL COMPANY
W B MASON CO INC
DARTMOUTH COLLEG TRUSTEE OF
See More
Show More
Department
PROCUREMENT SERVICES (04750) 59
FREAS FINANCIAL SERVICES (05802) 17
STUDENT LIFE (06001) 6
No Department 4
HUMAN DVLPMNT & FAMILY SCIENCE (03320) 4
See More
Show More
Order Owners
Pickering, Kristen
Woodin, Michael
Narayan, Abirami
Type of Order: All
Created Date: Last 90 days
Quick search
Add Filter
Clear All Filters
Department: All
20 Per Page
Department
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.
3322023 Requisition Pending Kristen Pickering 8/19/2021 3:40:05 PM – BEIJING PREPARE EDUC & TECH 240,000.00 USD PROCUREMENT SERVICES
UDST001031 Purchase Order Complete Laura Gleason 8/18/2021 8:25:10 AM 8/18/2021 8:26:09 AM TRI-STATE CARPET INC 9,880.00 USD STUDENT LIFE
UDRT000043 Purchase Order Complete Laura Gleason 8/18/2021 8:18:41 AM 8/18/2021 8:19:31 AM DELAWARE TECHNICAL COMMUNITY COLLEGE 37,000.00 USD STUDENT LIFE
3319175 Requisition Pending Alicia Adkins Martha Callahan 8/17/2021 10:36:51 AM – W B MASON CO INC 323.32 USD DE REHABILITATION INSTITUTE
UDST001030 Purchase Order Complete Laura Gleason 8/16/2021 11:36:44 AM 8/16/2021 11:37:37 AM PHILIP ROSENAU COMPANY INC STUDENT LIFE
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.


EXCHANGE
TEST SITE
Purchase Orders
Search (Alt+Q)
2,000.00 USD
Orders ▸ Search ▸ All Orders
Search All Orders
Save As
Pin Filters
Export All
Pin Filters Additional options
Pin Filters
Pin Columns
Remove Pinned Columns
Quick Filters
My Searches
Supplier
BANCROFT CONSTRUCTION 18
PHILIP ROSENAU COMPANY INC 14
FASTENAL COMPANY 10
W B MASON CO INC 9
DARTMOUTH COLLEGE TRUSTEE OF 8
See More
Show More
Department
PROCUREMENT SERVICES (04750) 59
FREAS FINANCIAL SERVICES (05802) 17
STUDENT LIFE (06001) 6
No Department 4
HUMAN DVLPMNT & FAMILY SCIENCE (03320) 4
See More
Show More
Order Owners
Pickering, Kristen 61
Woodin, Michael 17
Narayan, Abirami 13
Type of Order: All
Created Date: Last 90 days
Quick search
Add Filter
Clear All Fil
Department: All
To keep these changes for future use, you have the option to select Pin Filters and/or Pin Columns.
Page 1 of 6
20 Per Page
Order Identifier
Type
Order Status
Order Owners
Date/Time
Completed Date
Supplier
Total Amount
Department
3323783 Requisition Pending Karol West 8/22/2021 8:04:49 PM – DELAWARE TECHNICAL COMMUNITY COLLEGE 37,000.00 USD PCS-FINANCIAL SERVICES
3322023 Requisition Pending Kristen Pickering 8/19/2021 3:40:05 PM – BEIJING PREPARE EDUC & TECH 240,000.00 USD PROCUREMENT SERVICES
UDST001031 Purchase Order Complete Laura Gleason 8/18/2021 8:25:10 AM 8/18/2021 8:26:09 AM TRI-STATE CARPET INC 9,880.00 USD STUDENT LIFE
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3318342 Requisition Complete Kristen Pickering 8/13/2021 10:19:20 AM 8/13/2021 11:22:34 AM FASTENAL COMPANY 24.00 USD PROCUREMENT SERVICES
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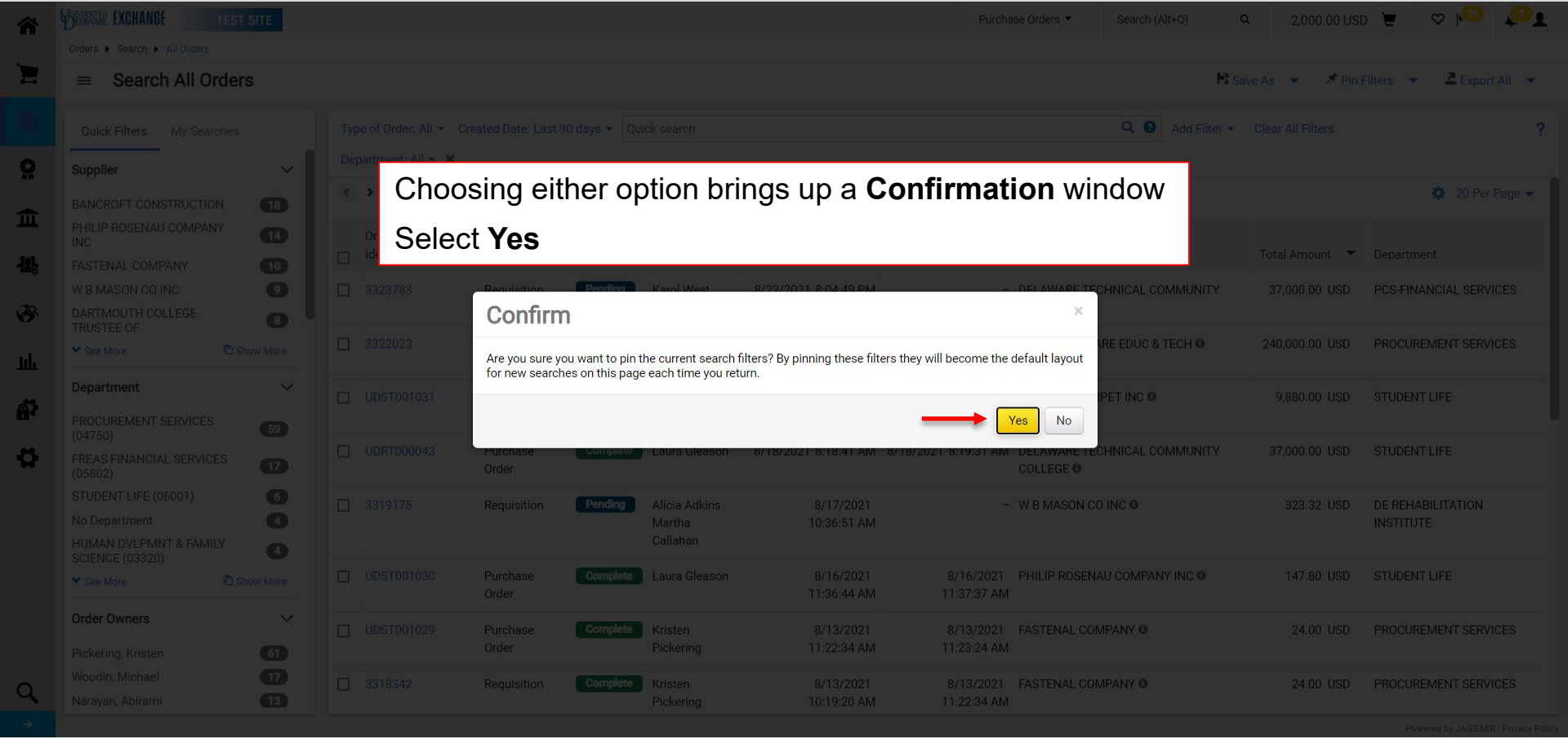
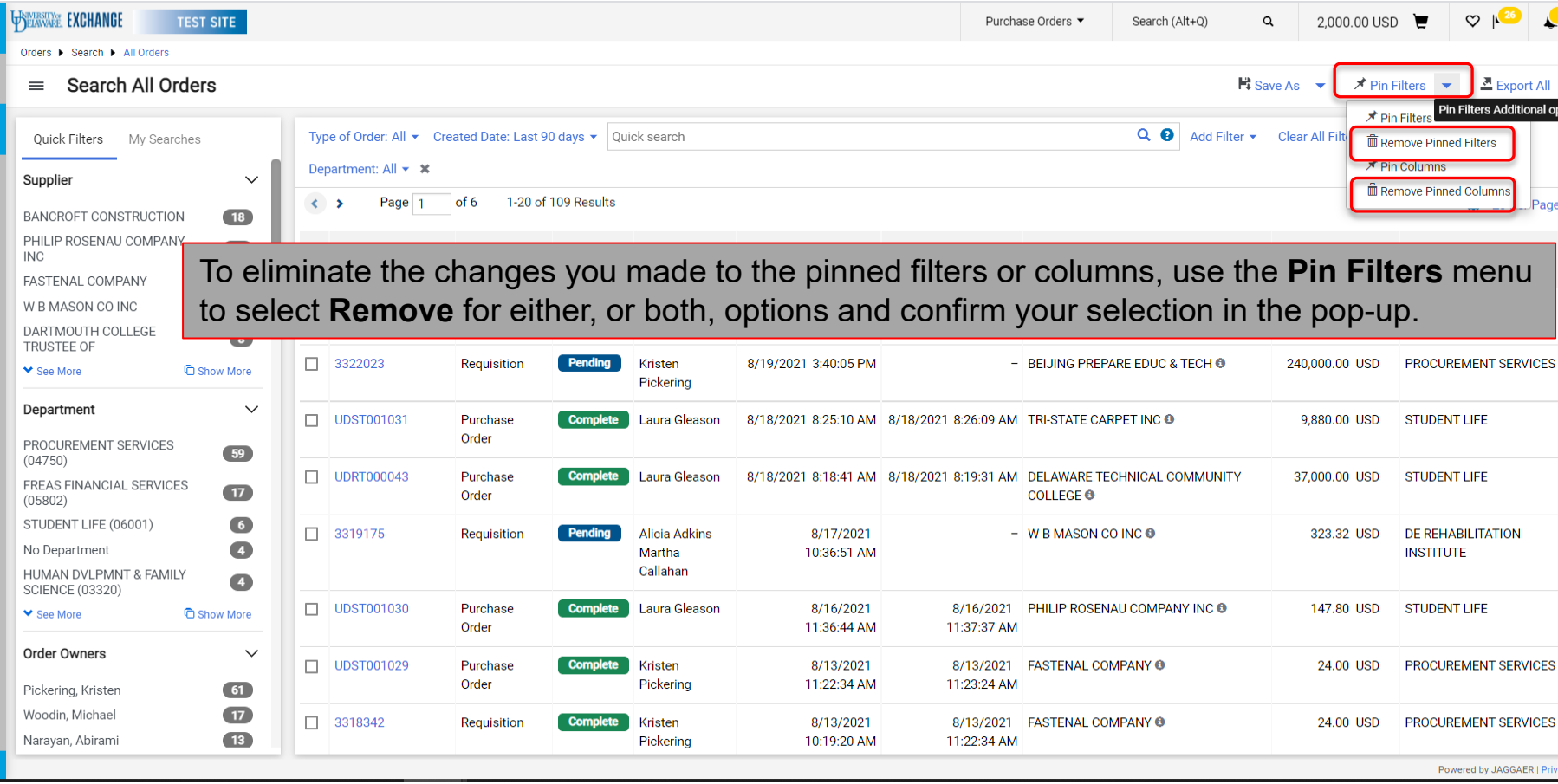


Choosing either option brings up a **Confirmation** window

Select **Yes**


UNIVERSITY OF DELAWARE EXCHANGE
TEST SITE
Purchase Orders
Search (Alt+Q)
2,000.00 USD
Orders ▸ Search ▸ All Orders
Search All Orders
Save As
Pin Filters
Export All
Pin Filters Additional options
Pin Filters
Remove Pinned Filters
Pin Columns
Remove Pinned Columns
Quick Filters
My Searches
Supplier
BANCROFT CONSTRUCTION 18
PHILIP ROSENAU COMPANY INC
FASTENAL COMPANY
W B MASON CO INC
DARTMOUTH COLLEGE TRUSTEE OF
See More
Show More
Department
PROCUREMENT SERVICES (04750) 59
FREAS FINANCIAL SERVICES (05802) 17
STUDENT LIFE (06001) 6
No Department 4
HUMAN DVLPMNT & FAMILY SCIENCE (03320) 4
See More
Show More
Order Owners
Pickering, Kristen 61
Woodin, Michael 17
Narayan, Abirami 13
Type of Order: All
Created Date: Last 90 days
Quick search
Add Filter
Clear All Filt
Department: All
Page 1 of 6
1-20 of 109 Results
Page
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.
3322023 Requisition Pending Kristen Pickering 8/19/2021 3:40:05 PM – BEIJING PREPARE EDUC & TECH 240,000.00 USD PROCUREMENT SERVICES
UDST001031 Purchase Order Complete Laura Gleason 8/18/2021 8:25:10 AM 8/18/2021 8:26:09 AM TRI-STATE CARPET INC 9,880.00 USD STUDENT LIFE
UDRT000043 Purchase Order Complete Laura Gleason 8/18/2021 8:18:41 AM 8/18/2021 8:19:31 AM DELAWARE TECHNICAL COMMUNITY COLLEGE 37,000.00 USD STUDENT LIFE
3319175 Requisition Pending Alicia Adkins Martha Callahan 8/17/2021 10:36:51 AM – W B MASON CO INC 323.32 USD DE REHABILITATION INSTITUTE
UDST001030 Purchase Order Complete Laura Gleason 8/16/2021 11:36:44 AM 8/16/2021 11:37:37 AM PHILIP ROSENAU COMPANY INC 147.80 USD STUDENT LIFE
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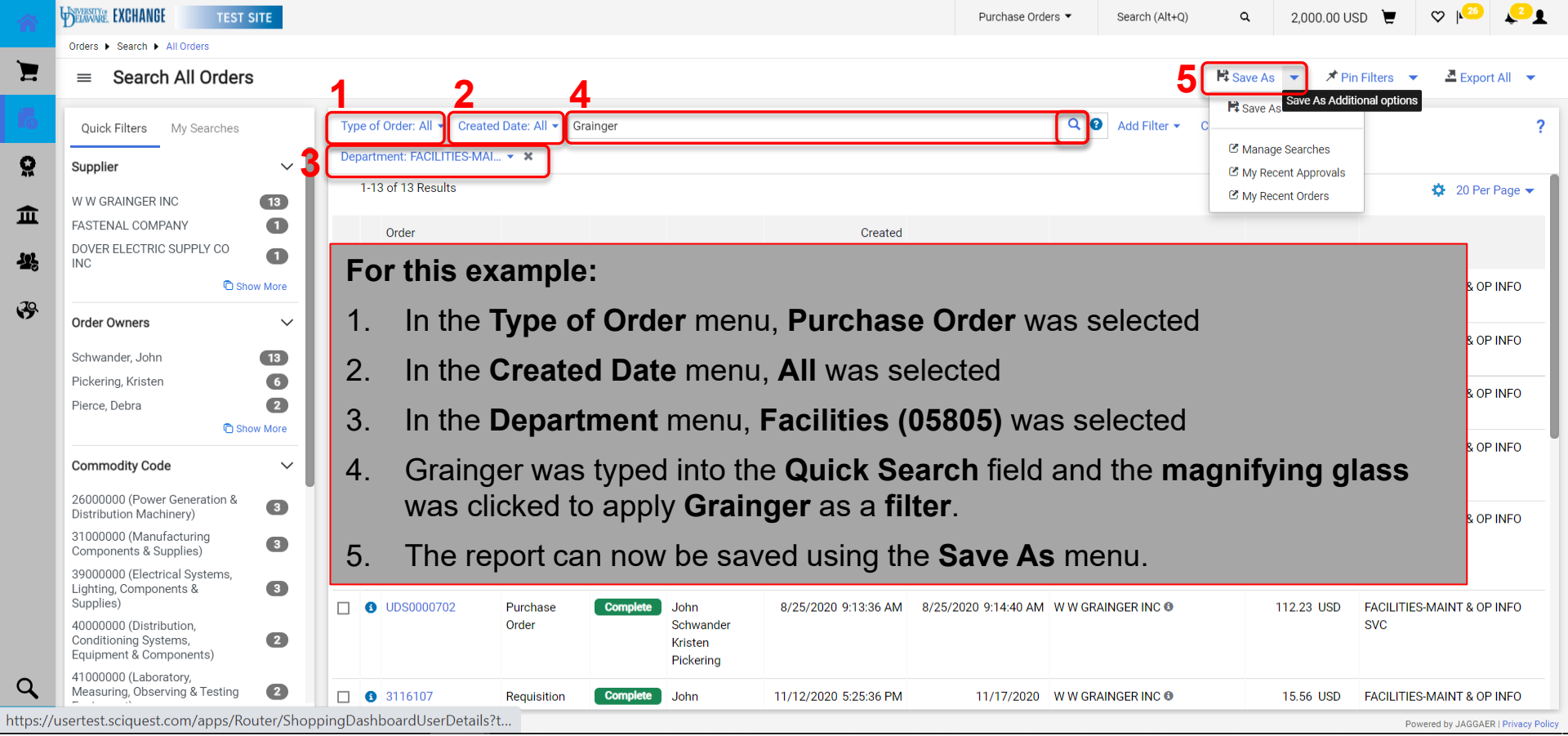
EXCHANGE
TEST SITE
Purchase Orders
Search (Alt+Q)
2,000.00 USD
Orders ▸ Search ▸ All Orders
Search All Orders
1
2
4
5
Save As
Pin Filters
Export All
Save As Additional options
Save As
Manage Searches
My Recent Approvals
My Recent Orders
Type of Order: All
Created Date: All
Grainger
Add Filter
3
Department: FACILITIES-MAI...
Quick Filters
My Searches
Supplier
W W GRAINGER INC 13
FASTENAL COMPANY 1
DOVER ELECTRIC SUPPLY CO INC 1
Show More
Order Owners
Schwander, John 13
Pickering, Kristen 6
Pierce, Debra 2
Show More
Commodity Code
26000000 (Power Generation & Distribution Machinery) 3
31000000 (Manufacturing Components & Supplies) 3
39000000 (Electrical Systems, Lighting, Components & Supplies) 3
40000000 (Distribution, Conditioning Systems, Equipment & Components) 2
41000000 (Laboratory, Measuring, Observing & Testing 2
1-13 of 13 Results
20 Per Page
Order
Created
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.
UDS0000702 Purchase Order Complete John Schwander Kristen Pickering 8/25/2020 9:13:36 AM 8/25/2020 9:14:40 AM W W GRAINGER INC 112.23 USD FACILITIES-MAINT & OP INFO SVC
3116107 Requisition Complete John 11/12/2020 5:25:36 PM 11/17/2020 W W GRAINGER INC 15.56 USD FACILITIES-MAINT & OP INFO
https://usertest.sciquest.com/apps/Router/ShoppingDashboardUserDetails?t...
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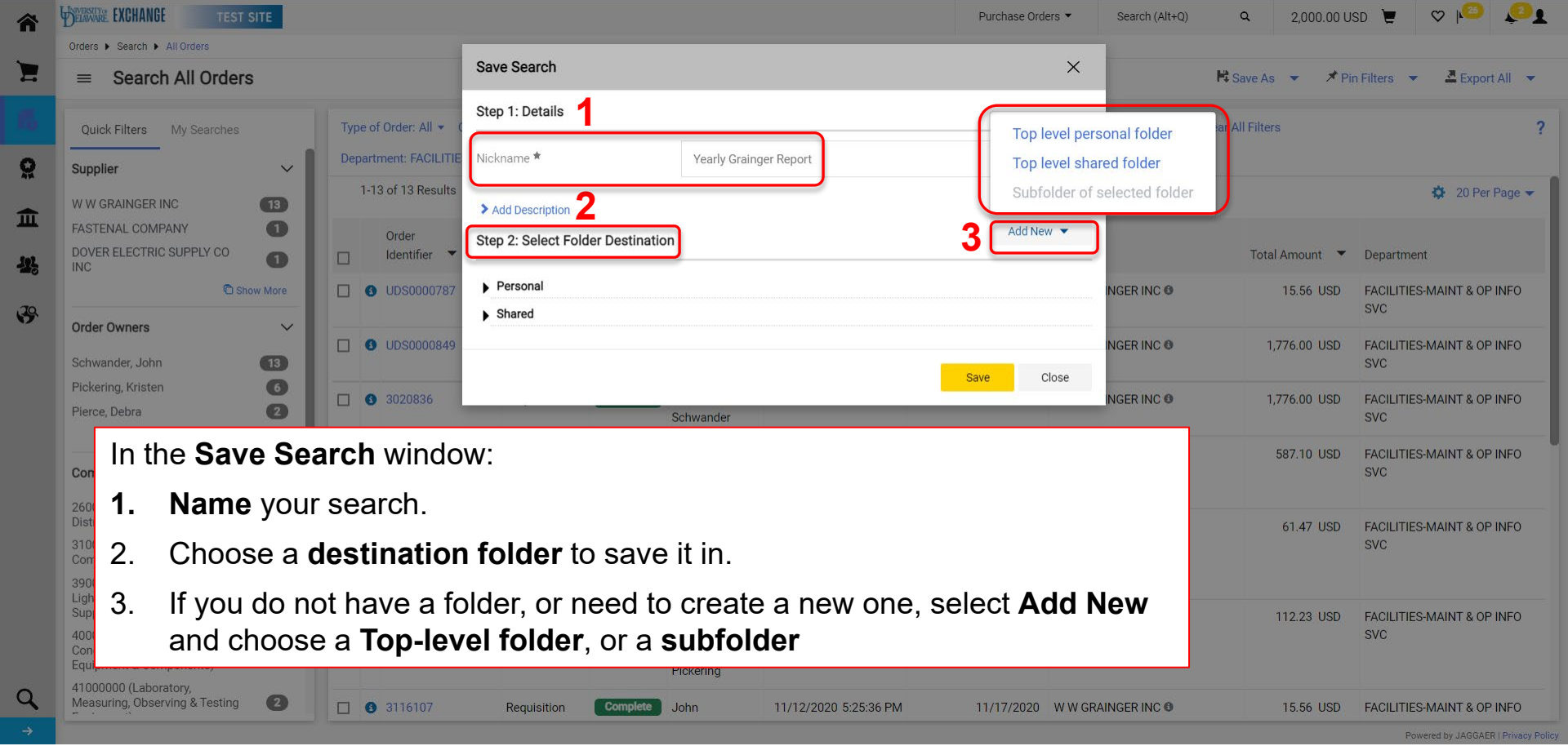
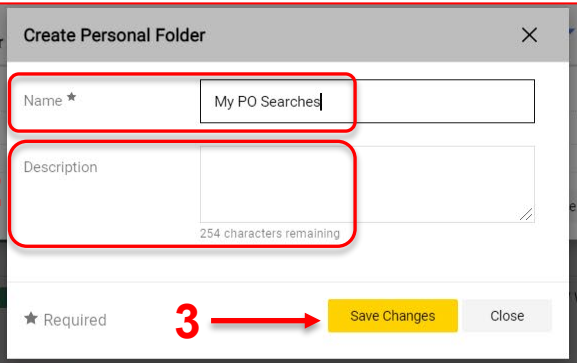


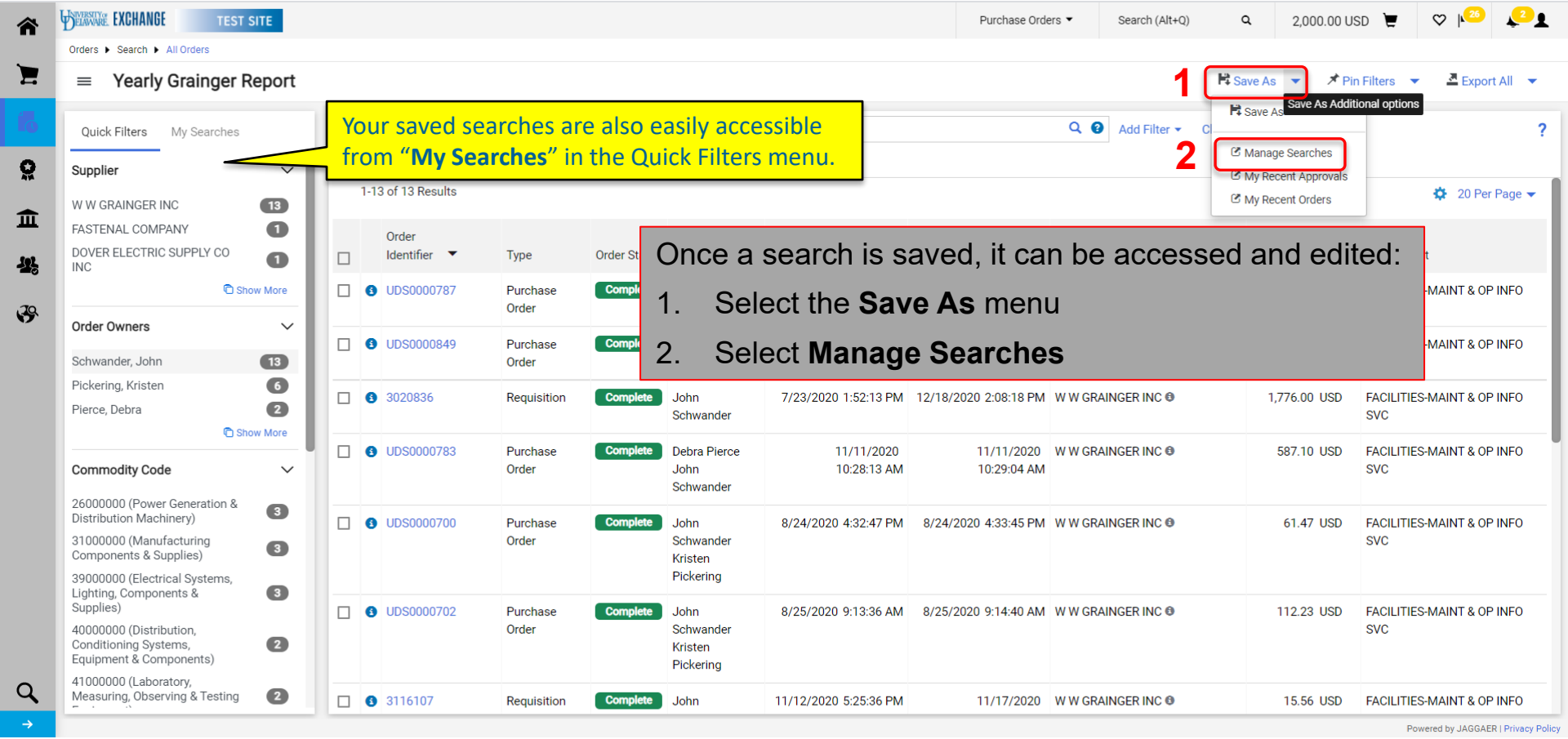
In the **Save Search** window:

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**




EXCHANGE
TEST SITE
Purchase Orders
Search (Alt+Q)
2,000.00 USD
Orders ▸ Search ▸ All Orders
Yearly Grainger Report
1
Save As
Pin Filters
Export All
Save As Additional options
Save As
Manage Searches
My Recent Approvals
My Recent Orders
2
Add Filter
Quick Filters
My Searches
Supplier
W W GRAINGER INC 13
FASTENAL COMPANY 1
DOVER ELECTRIC SUPPLY CO INC 1
Show More
Order Owners
Schwander, John 13
Pickering, Kristen 6
Pierce, Debra 2
Show More
Commodity Code
26000000 (Power Generation & Distribution Machinery) 3
31000000 (Manufacturing Components & Supplies) 3
39000000 (Electrical Systems, Lighting, Components & Supplies) 3
40000000 (Distribution, Conditioning Systems, Equipment & Components) 2
41000000 (Laboratory, Measuring, Observing & Testing 2
Your saved searches are also easily accessible from "My Searches" in the Quick Filters menu.
1-13 of 13 Results
20 Per Page
Order Identifier
Type
Order St
UDS0000787 Purchase Order Compl -MAINT & OP INFO
UDS0000849 Purchase Order Compl -MAINT & OP INFO
3020836 Requisition Complete John Schwander 7/23/2020 1:52:13 PM 12/18/2020 2:08:18 PM W W GRAINGER INC 1,776.00 USD FACILITIES-MAINT & OP INFO SVC
UDS0000783 Purchase Order Complete Debra Pierce John Schwander 11/11/2020 10:28:13 AM 11/11/2020 10:29:04 AM W W GRAINGER INC 587.10 USD FACILITIES-MAINT & OP INFO SVC
UDS0000700 Purchase Order Complete John Schwander Kristen Pickering 8/24/2020 4:32:47 PM 8/24/2020 4:33:45 PM W W GRAINGER INC 61.47 USD FACILITIES-MAINT & OP INFO SVC
UDS0000702 Purchase Order Complete John Schwander Kristen Pickering 8/25/2020 9:13:36 AM 8/25/2020 9:14:40 AM W W GRAINGER INC 112.23 USD FACILITIES-MAINT & OP INFO SVC
3116107 Requisition Complete John 11/12/2020 5:25:36 PM 11/17/2020 W W GRAINGER INC 15.56 USD FACILITIES-MAINT & OP INFO
Once a search is saved, it can be accessed and edited:
1. Select the Save As menu
2. Select Manage Searches
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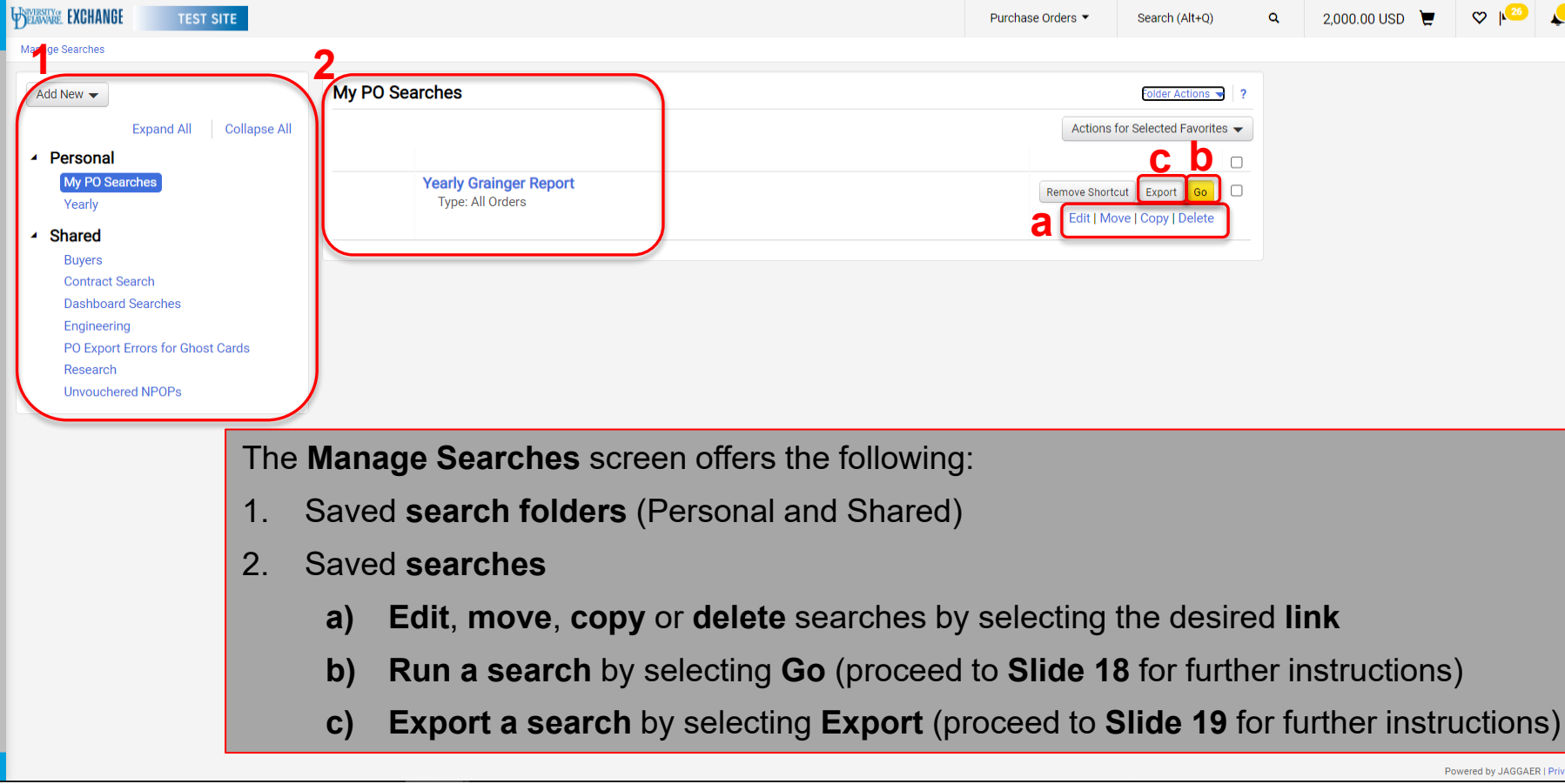

The **Manage Searches** screen offers the following:

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)

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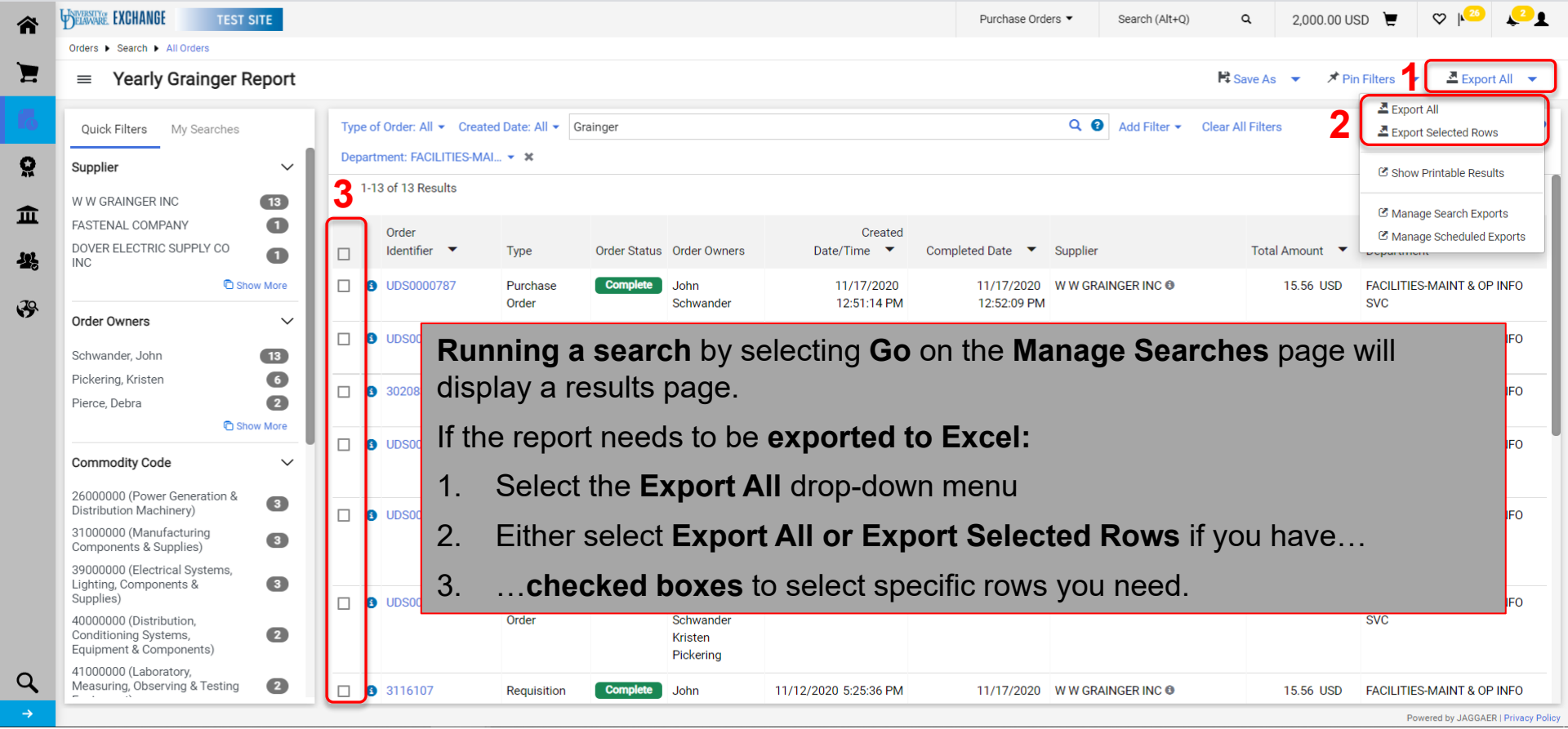
EXCHANGE
TEST SITE
Purchase Orders
Search (Alt+Q)
2,000.00 USD
Orders ▸ Search ▸ All Orders
Yearly Grainger Report
Save As
Pin Filters
1
Export All
2
Export All
Export Selected Rows
Show Printable Results
Manage Search Exports
Manage Scheduled Exports
Quick Filters
My Searches
Supplier
W W GRAINGER INC 13
FASTENAL COMPANY 1
DOVER ELECTRIC SUPPLY CO INC 1
Show More
Order Owners
Schwander, John 13
Pickering, Kristen 6
Pierce, Debra 2
Show More
Commodity Code
26000000 (Power Generation & Distribution Machinery) 3
31000000 (Manufacturing Components & Supplies) 3
39000000 (Electrical Systems, Lighting, Components & Supplies) 3
40000000 (Distribution, Conditioning Systems, Equipment & Components) 2
41000000 (Laboratory, Measuring, Observing & Testing 2
Type of Order: All
Created Date: All
Grainger
Add Filter
Clear All Filters
Department: FACILITIES-MAI...
3
1-13 of 13 Results
Order Identifier
Type
Order Status
Order Owners
Created Date/Time
Completed Date
Supplier
Total Amount
UDS0000787 Purchase Order Complete John Schwander 11/17/2020 12:51:14 PM 11/17/2020 12:52:09 PM W W GRAINGER INC 15.56 USD FACILITIES-MAINT & OP INFO SVC
3116107 Requisition Complete John 11/12/2020 5:25:36 PM 11/17/2020 W W GRAINGER INC 15.56 USD FACILITIES-MAINT & OP INFO
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.
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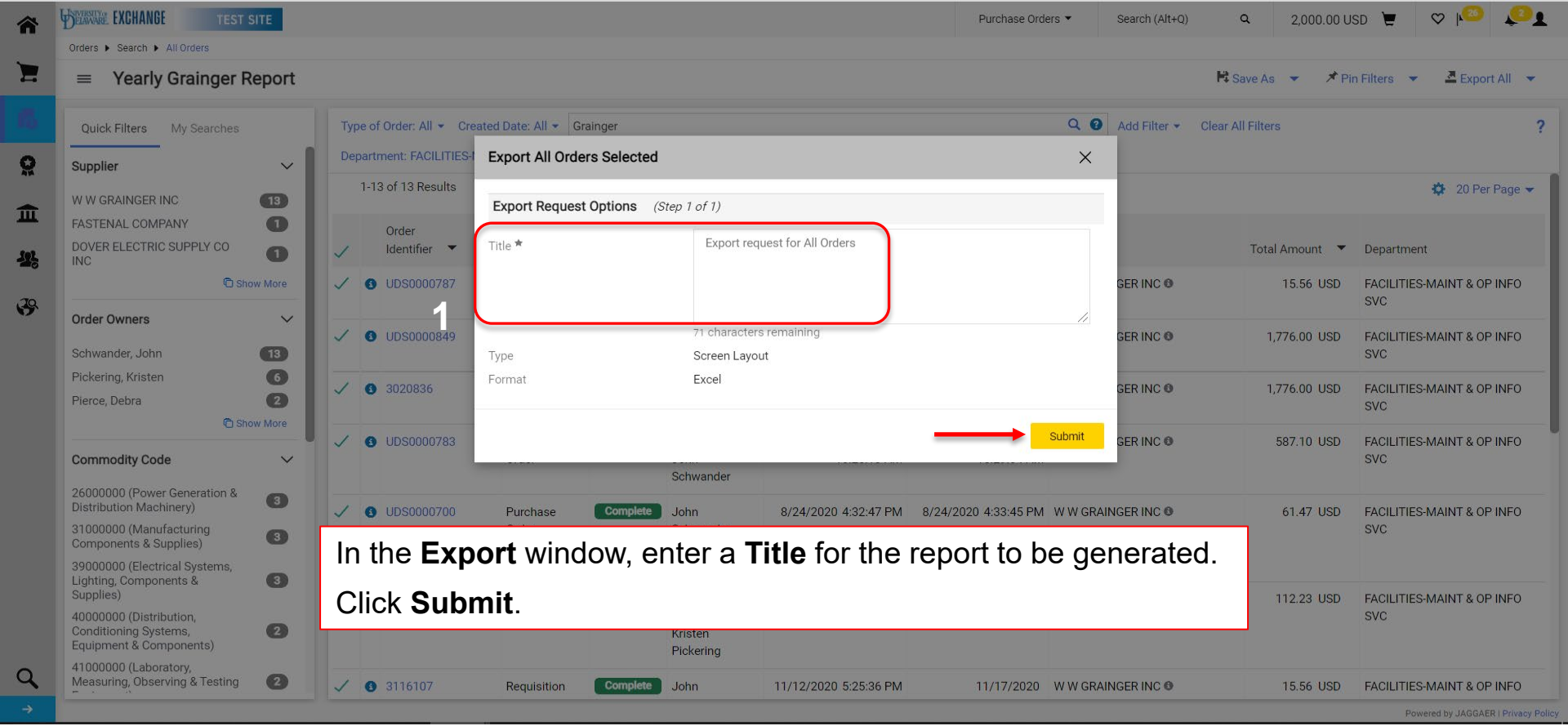
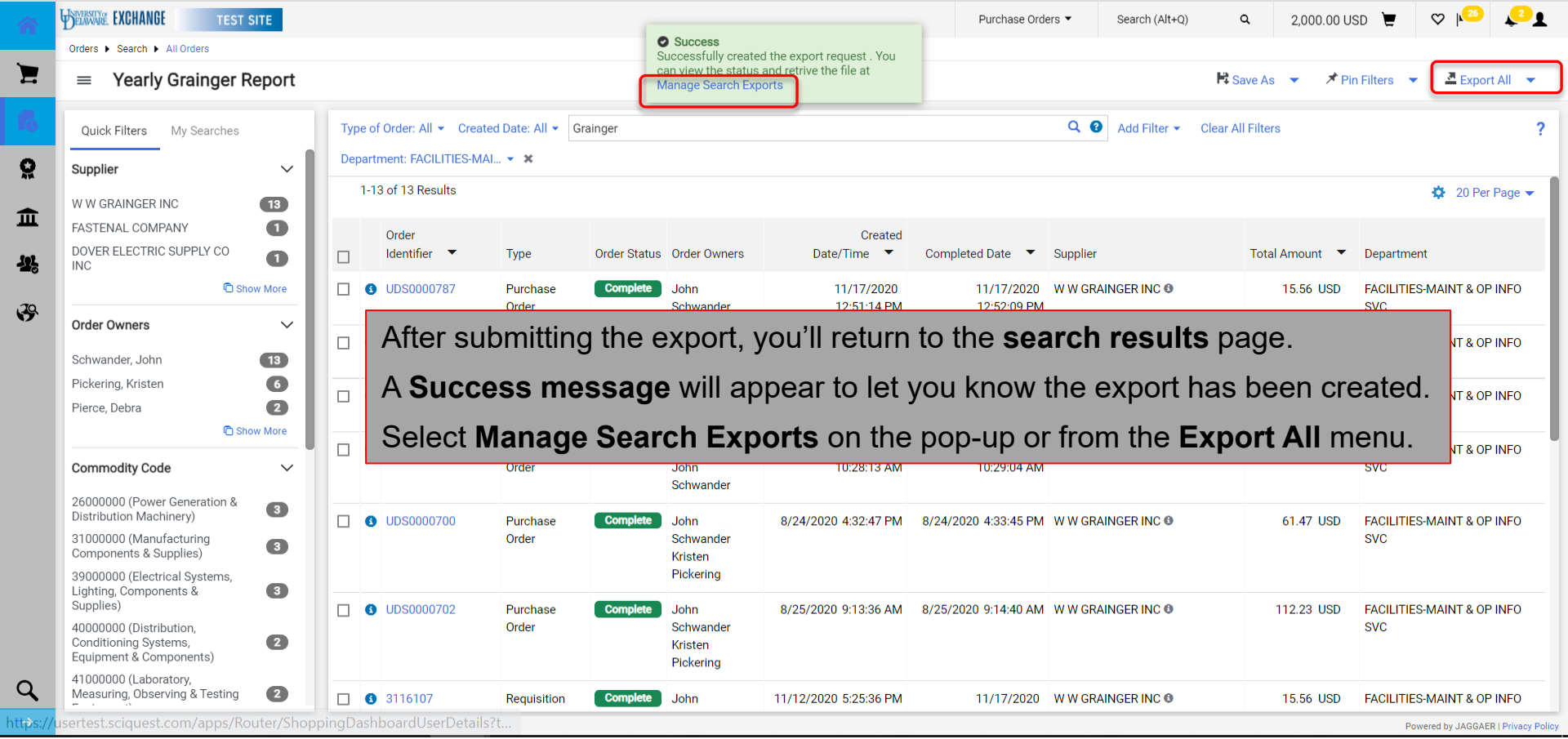


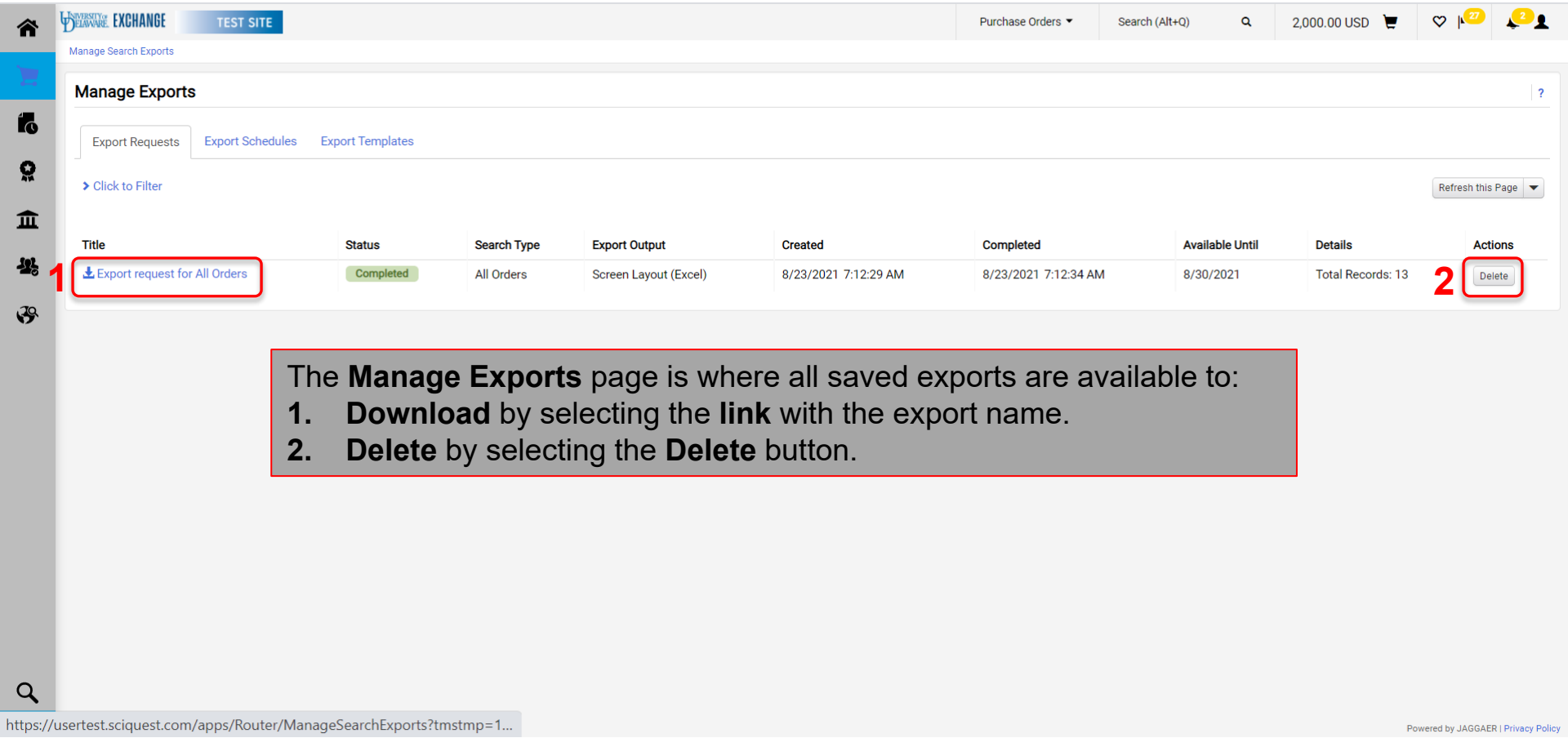
In the **Export** window, enter a **Title** for the report to be generated. Click **Submit**.

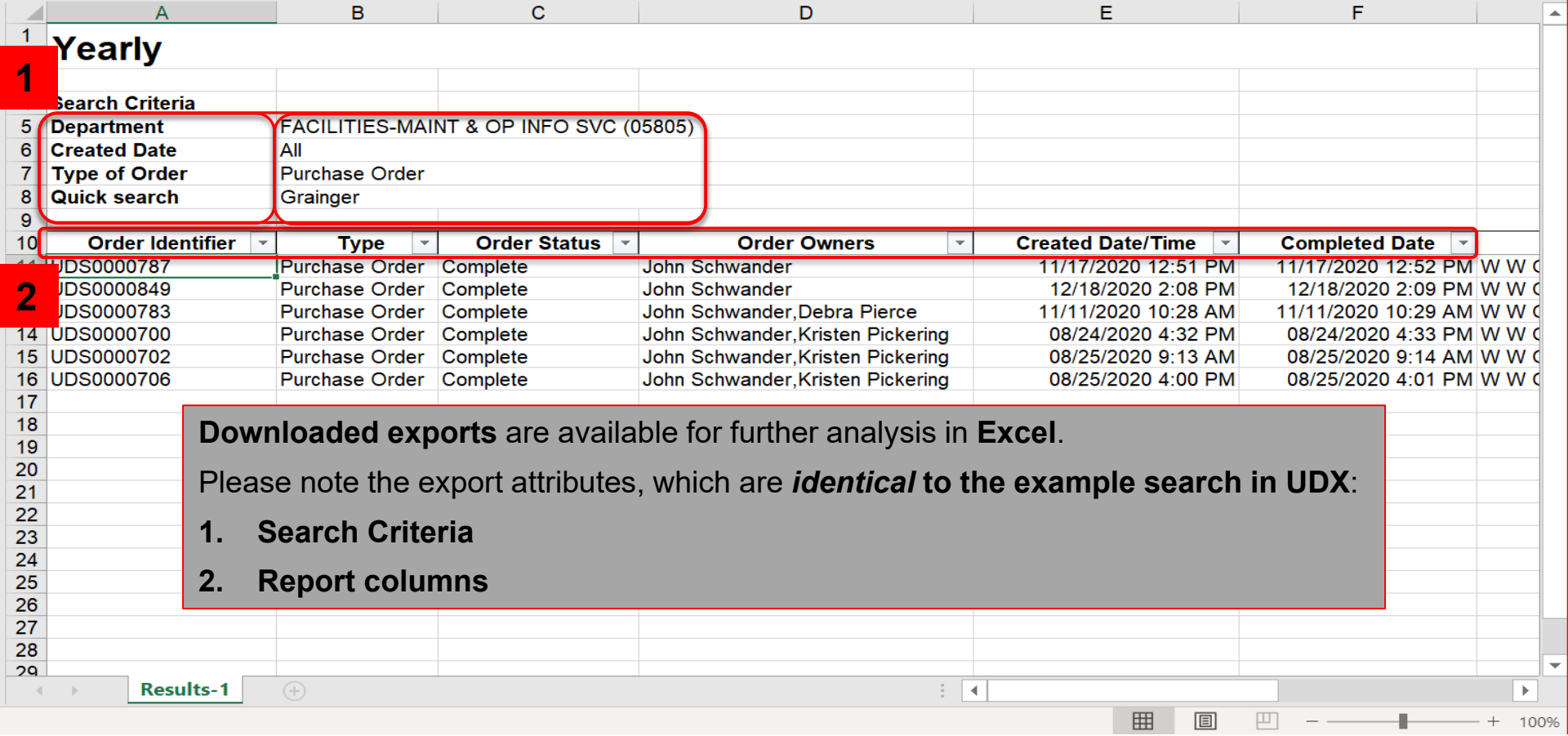


After submitting the export, you'll return to the **search results** page.

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.


EXCHANGE
TEST SITE
Purchase Orders
Search (Alt+Q)
2,000.00 USD
Manage Search Exports
Manage Exports
Export Requests
Export Schedules
Export Templates
Click to Filter
Refresh this Page
Title
Status
Search Type
Export Output
Created
Completed
Available Until
Details
Actions
1
Export request for All Orders
Completed
All Orders
Screen Layout (Excel)
8/23/2021 7:12:29 AM
8/23/2021 7:12:34 AM
8/30/2021
Total Records: 13
2
Delete
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.
https://usertest.sciquest.com/apps/Router/ManageSearchExports?tmstmp=1...
Powered by JAGGAER | Privacy Policy



Yearly

1

Search Criteria

Department	FACILITIES-MAINT & OP INFO SVC (05805)
Created Date	All
Type of Order	Purchase Order
Quick search	Grainger

2

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	
UDS0000787	Purchase Order	Complete	John Schwander	11/17/2020 12:51 PM	11/17/2020 12:52 PM	W W C
UDS0000849	Purchase Order	Complete	John Schwander	12/18/2020 2:08 PM	12/18/2020 2:09 PM	W W C
UDS0000783	Purchase Order	Complete	John Schwander,Debra Pierce	11/11/2020 10:28 AM	11/11/2020 10:29 AM	W W C
UDS0000700	Purchase Order	Complete	John Schwander,Kristen Pickering	08/24/2020 4:32 PM	08/24/2020 4:33 PM	W W C
UDS0000702	Purchase Order	Complete	John Schwander,Kristen Pickering	08/25/2020 9:13 AM	08/25/2020 9:14 AM	W W C
UDS0000706	Purchase Order	Complete	John Schwander,Kristen Pickering	08/25/2020 4:00 PM	08/25/2020 4:01 PM	W W C

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**

Results-1

100%

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