

UNIVERSITY OF DELAWARE[®] EXCHANGE

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.



- Orders**
 - Quick search
 - Search**
 - All Orders
 - My Orders
 - Approvals
- Requisitions
- Purchase Orders
- Change Requests
- Procurement Requests
- Receipts

On the home page, navigate to **Orders** > **Search** > **All Orders**.

Procurement Forms

- Non-PO Payment Request
- Subaward Request
- NIMBL NIIIMBL Subaward Request
- RFX Request (Option 2)
- Waiver of Bid Request

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

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



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.

Welcome!

It looks like you're new here. We'd like to give you a quick tour to introduce you to some of our new features, if you're interested.

Step-by-Step Tour

Walk through a tour highlighting important features Yes No

Show this again Yes No

Video

Heads up! This video will open in a pop-up window. If you use a pop-up blocker, please ensure it does not block this.

Watch a video explaining how to use this page Yes No

Show this again Yes No

Show me! Maybe next time

- Quick Filters My Searches
- Supplier**
- AMAZON.COM 13
 - MCKESSON MEDICAL SURGICAL INC. 13
 - W W GRAINGER INC 12
 - W B MASON CO INC 8
 - DELL COMPUTER SLG SALES 6
 - See More Show More
- Department**
- PROCUREMENT SERVICES (04750) 21
 - No Department 14
 - FACILITIES-BLDGMNT&OP HEATCOOL (05846) 14
 - FACILITIES-ISELAB OPS & MAINT (05856) 4
 - BIOMEDICAL ENGR DEPARTMENT (03170) 3
 - See More Show More
- Order Owners**
- Pickering, Kristen 18
 - Roland, Jenny 16
 - Fenkel, David 10
 - Ritchie, Christian 4
 - Wassmer, Kenneth 4
 - See More Show More
- Approved By**

Type of Order: All Created Date: Last 90 days Quick search

Page 1 of 4

Order Identifier	Type	Status	Requestor	Created Date	Completed Date	Supplier	Total Amount
UDB0000001	Purchase Order				8/21/2020 10:14:22 AM	TRI-M GROUP LLC	83,400.00 USD
UDS0000017	Purchase Order				8/20/2020 7:08:05 PM	W W GRAINGER INC	184.00 USD
UDS0000016	Purchase Order				8/20/2020 2:07:33 PM	W W GRAINGER INC	7.08 USD
UDS0000015	Purchase Order				8/20/2020 12:03:11 PM	W W GRAINGER INC	118.47 USD
UDS0000014	Purchase Order				8/20/2020 11:53:18 AM	W W GRAINGER INC	271.80 USD
135022932	Requisition				8/20/2020 7:07:15 PM	W W GRAINGER INC	184.00 USD
UDS0000013	Purchase Order				8/20/2020 10:19:38 AM	W W GRAINGER INC	2.92 USD
UDS0000012	Purchase Order				8/20/2020 10:17:59 AM	W W GRAINGER INC	817.36 USD
135018741	Requisition	Complete	Douglas Isakoff Jenny Roland	8/20/2020 9:30:38 AM	8/20/2020 2:07:00 PM	W W GRAINGER INC	7.08 USD
UDS0000011	Purchase Order	Complete	Jenny Roland Kenneth Wassmer	8/19/2020 2:11:19 PM	8/19/2020 2:11:37 PM	TITUS COMPANY INC	11,164.00 USD
134977274	Requisition	Complete	Jenny Roland Rudolph Paladnietti	8/19/2020 11:25:45 AM	8/20/2020 12:02:28 PM	W W GRAINGER INC	118.47 USD

Completed Date	Supplier	Total Amount
8/21/2020 10:14:22 AM	TRI-M GROUP LLC	83,400.00 USD
8/20/2020 7:08:05 PM	W W GRAINGER INC	184.00 USD
8/20/2020 2:07:33 PM	W W GRAINGER INC	7.08 USD
8/20/2020 12:03:11 PM	W W GRAINGER INC	118.47 USD
8/20/2020 11:53:18 AM	W W GRAINGER INC	271.80 USD
8/20/2020 7:07:15 PM	W W GRAINGER INC	184.00 USD
8/20/2020 10:19:38 AM	W W GRAINGER INC	2.92 USD
8/20/2020 10:17:59 AM	W W GRAINGER INC	817.36 USD
8/20/2020 2:07:00 PM	W W GRAINGER INC	7.08 USD
8/19/2020 2:11:37 PM	TITUS COMPANY INC	11,164.00 USD
8/20/2020 12:02:28 PM	W W GRAINGER INC	118.47 USD



UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

Purchase Orders Search (Alt+Q) 2,000.00 USD

Orders Search All Orders

Search All Orders

Quick Filters My Searches

Type of Order: All Created Date: Last 90 days Quick search Add Filter Clear All Filters

Supplier

- BANCROFT CONSTRUCTION 18
- PHILIP ROSENAU COMPANY INC 14
- FASTENAL COMPANY 10
- W B MASON CO INC 9
- DARTMOUTH COLLEGE TRUSTEE OF 8

Department

- PROCUREMENT SERVICES (04750)
- FREAS FINANCIAL (05802)
- STUDENT LIFE (06...)
- No Department
- HUMAN DEVELOPMENT SCIENCE (03320)

Order Owners

- Pickering, Kristen 61
- Woodin, Michael 17
- Narayana, Abirami 13

Results

Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount	Department
Pending	Karol West	8/22/2021 8:04:49 PM		DELAWARE TECHNICAL COMMUNITY COLLEGE	37,000.00 USD	PCS-FINANCIAL SERVICES
Pending	Kristen Pickering	8/19/2021 3:40:05 PM		BEIJING PREPARE EDUC & TECH	240,000.00 USD	PROCUREMENT SERVICES
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
Complete	Kristen Pickering	8/13/2021 11:22:34 AM	8/13/2021 11:23:24 AM	FASTENAL COMPANY	24.00 USD	PROCUREMENT SERVICES
Complete	Kristen Pickering	8/13/2021 10:19:20 AM	8/13/2021 11:22:34 AM	FASTENAL COMPANY	24.00 USD	PROCUREMENT SERVICES
Complete	Kristen	8/12/2021 4:28:23 PM	8/12/2021 4:29:29 PM	FASTENAL COMPANY	2,856.31 USD	PROCUREMENT SERVICES

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**

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UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

Orders Search All Orders

Search All Orders Save As Pin Filters Export All

Quick Filters My Searches

Type of Order: All Created Date: Last 90 days Quick search Add Filter Clear All Filters 20 Per Page

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 DVLPMT & FAMILY SCIENCE (03320) 4
- See More Show More

Order Owners

- Pickering, Kristen 61
- Woodin, Michael 17
- Narayan, Abirami 13

Order Identifier

- 3323783
- 3322023
- UDST001031
- UDRT000043
- 3319175
- 3318342
- UDST001027

Order Type

- Purchase Order
- Purchase Order
- Requisition
- Requisition
- Purchase

Status

- Complete
- Complete

Order Owner

- Kristen Pickering
- Kristen

Created Date

- 8/13/2021 10:19:20 AM
- 8/13/2021 11:22:34 AM
- 8/12/2021 4:28:23 PM
- 8/12/2021 4:29:29 PM

Completed Date

- 8/18/2021 8:25:10 AM
- 8/18/2021 8:26:09 AM
- 8/18/2021 8:18:41 AM
- 8/18/2021 8:19:31 AM
- 8/17/2021 10:36:51 AM

Supplier

- DELAWARE TECHNICAL COMMUNITY COLLEGE
- BEIJING PREPARE EDUC & TECH
- TRI-STATE CARPET INC
- DELAWARE TECHNICAL COMMUNITY COLLEGE
- W B MASON CO INC
- FASTENAL COMPANY

Total Amount

- 37,000.00 USD
- 240,000.00 USD
- 9,880.00 USD
- 37,000.00 USD
- 323.32 USD
- 147.80 USD
- 24.00 USD
- 24.00 USD
- 2,856.31 USD

Department

- PCS-FINANCIAL SERVICES
- PROCUREMENT SERVICES
- STUDENT LIFE
- STUDENT LIFE
- DE REHABILITATION INSTITUTE
- STUDENT LIFE
- PROCUREMENT SERVICES
- PROCUREMENT SERVICES
- PROCUREMENT SERVICES

Days

- Last 7 days
- Last 30 days
- Last 60 days
- Last 90 days
- Last 120 days
- Last 180 days
- Last Week
- This Week
- Yesterday
- Today

Calendar

- Month-To-Date
- Year-To-Date
- Last Month
- Previous Year

Fiscal

- Fiscal Year-To-Date
- Previous Fiscal Year

Apply

Choose a **Created Date** range from the menu, or enter it manually.

- Click **Apply**

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Orders Search All Orders

Search All Orders

- 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 DVLP MNT & 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

Page 1 of 6 1-20 of 109 Results

Use the Add Filter to add one or more additional filters.

Order ID	Type	Status	Requester	Created	Updated	Vendor	Amount	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 & T		
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

Add Filter Clear All Filters

Find search filter...

Identifiers

- Order Id

Dates

- Approved Date
- Completed Date
- Last Modified

General Information

- Approved By
- Contract Type
- Department

20 Per Page

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

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**

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**



1

2



4

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



Search All Orders

Quick Filters My Searches

Type of Order: All Created Date: Last 90 days Quick search

Add Filter Clear All Filters

Supplier

Department: All

- Using the **Add Filter** dropdown, a new **filter** was added for **Departments**.
- Using the **Setup** icon to access the **Configure Column Display** window, a new **column** was added for **Department**.

20 Per Page

Department

BANCROFT CONSTR
PHILIP ROSENAU COM
INC
FASTENAL COMPANY
W B MASON CO INC
DARTMOUTH COLLEGE
TRUSTEE OF

Department

PROCUREMENT SERVICES (04750) 59

FREAS FINANCIAL SERVICES (05802) 17

STUDENT LIFE (06001) 6

No Department 4

HUMAN DVLPMNT & FAMILY SCIENCE (03320) 4

<input type="checkbox"/>	3322023	Requisition	Pending	Kristen Pickering	8/19/2021 3:40:05 PM		BEIJING PREPARE EDUC & TECH	240,000.00 USD	PROCUREMENT SERVICES
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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.

Orders Search All Orders

Search All Orders

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 DVLPMT & 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 Save As Export All

Department: All x Page 1 of 6 1-20 20 Per Page

Order Identifier	Type	Order Status	Order Owners	Date/Time	Completed Date	Supplier	Total Amount	Department
<input type="checkbox"/> 3323783	Requisition	Pending	Karol West	8/22/2021 8:04:49 PM		DELAWARE TECHNICAL COMMUNITY COLLEGE	37,000.00 USD	PCS-FINANCIAL SERVICES
<input type="checkbox"/> 3322023	Requisition	Pending	Kristen Pickering	8/19/2021 3:40:05 PM		BEIJING PREPARE EDUC & TECH	240,000.00 USD	PROCUREMENT SERVICES
<input type="checkbox"/> 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
<input type="checkbox"/> 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
<input type="checkbox"/> 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
<input type="checkbox"/> 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
<input type="checkbox"/> 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
<input type="checkbox"/> 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

To keep these changes for future use, you have the option to select **Pin Filters** and/or **Pin Columns**.

Pin Filters Additional options

- Pin Filters
- Pin Columns
- Remove Pinned Columns



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

Quick Filters My Searches

Type of Order: All Created Date: Last 90 days Quick search Add Filter Clear All Filters

Supplier

- BANCROFT CONSTRUCTION 16
- PHILIP ROSENAU COMPANY INC 14
- FASTENAL COMPANY 10
- W B MASON CO INC 9
- DARTMOUTH COLLEGE TRUSTEE OF 8

Department

- PROCUREMENT SERVICES (04750) 59
- FREAS FINANCIAL SERVICES (05802) 17
- STUDENT LIFE (06001) 6
- No Department 4
- HUMAN DVLPMNT & FAMILY SCIENCE (03320) 4

Order Owners

- Pickering, Kristen 61
- Woodin, Michael 17
- Narayan, Abirami 15

Table:

Order ID	Type	Status	Order Owner	Created Date	Department	Total Amount	Department
3323783	Purchase Order	Complete	Laura Gleason	8/29/2021 9:04:49 AM	DELAWARE TECHNICAL COMMUNITY	37,000.00 USD	PCS-FINANCIAL SERVICES
3322023	Purchase Order	Complete	Laura Gleason	8/29/2021 9:04:49 AM	DELAWARE TECHNICAL COMMUNITY	37,000.00 USD	PROCUREMENT SERVICES
UDST001031	Purchase Order	Complete	Laura Gleason	8/18/2021 8:18:41 AM	DELAWARE TECHNICAL COMMUNITY	9,880.00 USD	STUDENT LIFE
UDRT000043	Purchase Order	Complete	Laura Gleason	8/18/2021 8:19:31 AM	DELAWARE TECHNICAL COMMUNITY	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	PHILIP ROSENAU COMPANY INC	147.80 USD	STUDENT LIFE
UDST001029	Purchase Order	Complete	Kristen Pickering	8/13/2021 11:22:34 AM	FASTENAL COMPANY	24.00 USD	PROCUREMENT SERVICES
3318942	Requisition	Complete	Kristen Pickering	8/13/2021 10:19:20 AM	FASTENAL COMPANY	24.00 USD	PROCUREMENT SERVICES

Confirm

Are you sure you want to pin the current search filters? By pinning these filters they will become the default layout for new searches on this page each time you return.

Yes No

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

20 Per Page

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Orders Search All Orders

Search All Orders

Save As Pin Filters Export All

Quick Filters My Searches

Type of Order: All Created Date: Last 90 days Quick search Add Filter Clear All Filters

Department: All Page 1 of 6 1-20 of 109 Results

Pin Filters Additional options

- Remove Pinned Filters
- Pin Columns
- Remove Pinned Columns

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.

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 DVLPMT & FAMILY SCIENCE (03320) 4
- See More Show More

Order Owners

- Pickering, Kristen 61
- Woodin, Michael 17
- Narayan, Abirami 13

<input type="checkbox"/>	3322023	Requisition	Pending	Kristen Pickering	8/19/2021 3:40:05 PM		BEIJING PREPARE EDUC & TECH	240,000.00 USD	PROCUREMENT SERVICES
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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



Orders Search All Orders

Search All Orders

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 Type of Order: All 2 Created Date: All 4 Grainger

3 Department: FACILITIES-MAINT & OP INFO

5 Save As Save As Additional options

- Manage Searches
- My Recent Approvals
- My Recent Orders

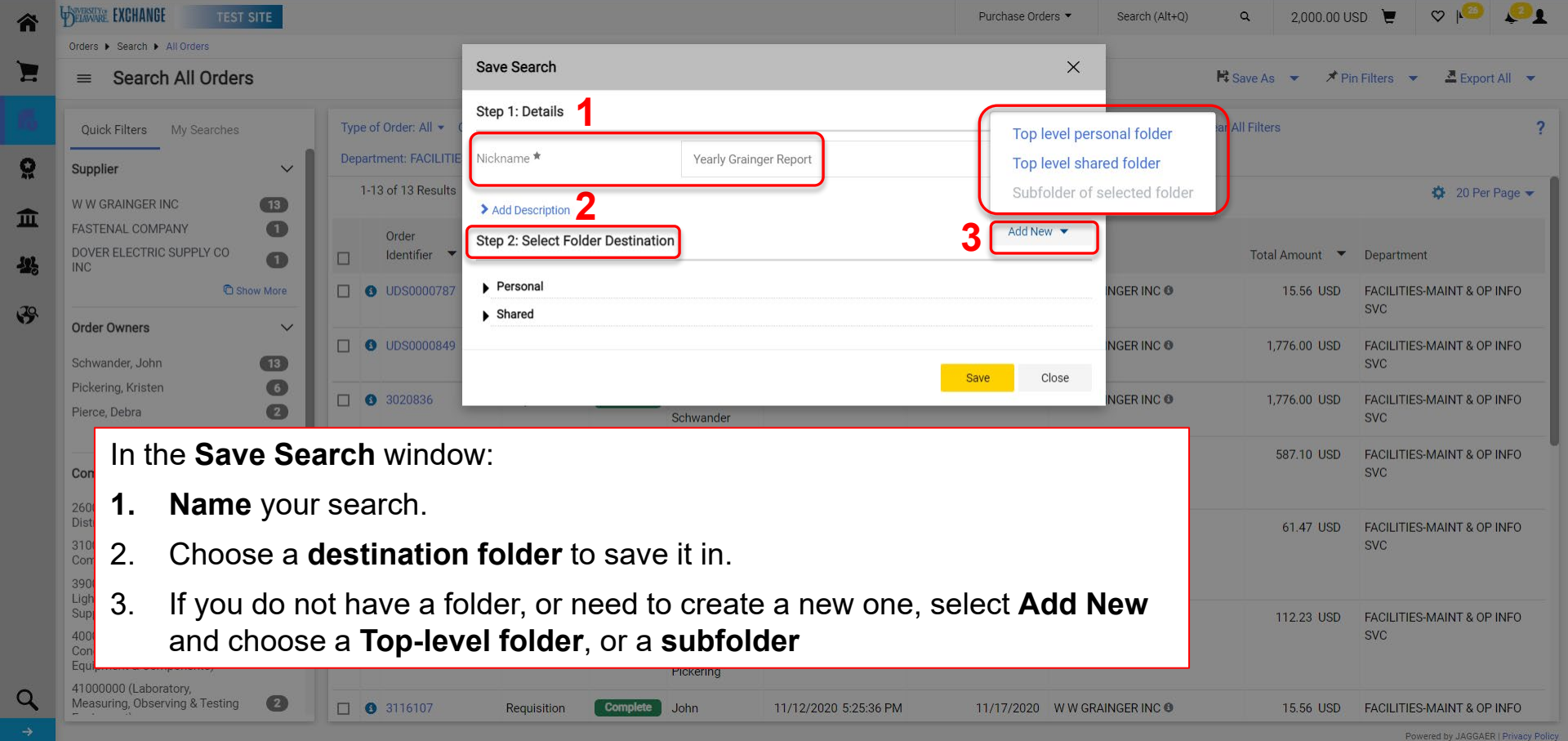
20 Per Page

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.

Order	Created	Status	Order Owner	Order Date	Created Date	Supplier	Amount	Department
<input type="checkbox"/> 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
<input type="checkbox"/> 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





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**

Create Personal Folder

Step 2: Select Folder

Personal **1**

Shared

Name *

Description
254 characters remaining

★ Required **3** →



Orders Search All Orders

Yearly Grainger Report

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 Save As

2 Save As Additional options

- Manage Searches
- My Recent Approvals
- My Recent Orders

1-13 of 13 Results

Order Identifier	Type	Order Status	Order Owner	Created	Updated	Company	Amount	Category
UDS0000787	Purchase Order	Complete						
UDS0000849	Purchase Order	Complete						
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**



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)

UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

Orders Search All Orders

Yearly Grainger Report

Save As Pin Filters 1 Export All 2

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

Department: FACILITIES-MAI... x

1-13 of 13 Results

<input type="checkbox"/>	Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount	Department
<input type="checkbox"/>	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
<input type="checkbox"/>	UDS0000787								
<input type="checkbox"/>	30208								
<input type="checkbox"/>	UDS0000787								
<input type="checkbox"/>	UDS0000787								
<input type="checkbox"/>	UDS0000787			Schwander, Kristen Pickering					SVC
<input type="checkbox"/>	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

Export All
Export Selected Rows
Show Printable Results
Manage Search Exports
Manage Scheduled Exports

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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UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

Orders Search All Orders

Yearly Grainger Report

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

Department: FACILITIES-MAINT & OP INFO

1-13 of 13 Results

Order Identifier	Type	Status	Order Owner	Created Date	Updated Date	Supplier	Total Amount	Department
UDS0000787	Purchase	Complete	John Schwander	8/24/2020 4:32:47 PM	8/24/2020 4:33:45 PM	W W GRAINGER INC	15.56 USD	FACILITIES-MAINT & OP INFO SVC
UDS0000849	Purchase	Complete	John Schwander	8/24/2020 4:32:47 PM	8/24/2020 4:33:45 PM	W W GRAINGER INC	1,776.00 USD	FACILITIES-MAINT & OP INFO SVC
3020836	Purchase	Complete	John Schwander	8/24/2020 4:32:47 PM	8/24/2020 4:33:45 PM	W W GRAINGER INC	1,776.00 USD	FACILITIES-MAINT & OP INFO SVC
UDS0000783	Purchase	Complete	John Schwander	8/24/2020 4:32:47 PM	8/24/2020 4:33:45 PM	W W GRAINGER INC	587.10 USD	FACILITIES-MAINT & OP INFO SVC
UDS0000700	Purchase	Complete	John Schwander	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
3116107	Requisition	Complete	John Schwander	11/12/2020 5:25:36 PM	11/17/2020	W W GRAINGER INC	112.23 USD	FACILITIES-MAINT & OP INFO SVC
3116107	Requisition	Complete	John Schwander	11/12/2020 5:25:36 PM	11/17/2020	W W GRAINGER INC	15.56 USD	FACILITIES-MAINT & OP INFO SVC

Export All Orders Selected

Export Request Options (Step 1 of 1)

Title * Export request for All Orders

Type Screen Layout

Format Excel

Submit

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

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Yearly Grainger Report

Quick Filters My Searches

Supplier

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 - FASTENAL COMPANY 1
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- Show More

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Commodity Code

- 26000000 (Power Generation & Distribution Machinery) 3
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- 39000000 (Electrical Systems, Lighting, Components & Supplies) 3
- 40000000 (Distribution, Conditioning Systems, Equipment & Components) 2
- 41000000 (Laboratory, Measuring, Observing & Testing) 2

Success
 Successfully created the export request . You can view the status and retrieve the file at
[Manage Search Exports](#)

Export All

Type of Order: All Created Date: All Grainger Add Filter Clear All Filters

Department: FACILITIES-MAI...

1-13 of 13 Results

20 Per Page

<input type="checkbox"/>	Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount	Department
<input type="checkbox"/>	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
<input type="checkbox"/>				John Schwander	10:28:13 AM	10:29:04 AM			SVC
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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

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.



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
↓ 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	Delete

The **Manage Exports** page is where all saved exports are available to:

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



Yearly

Search Criteria

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

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

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](#)

