

Using the Search Export to Research POs and Requisitions

Overview

Use this instruction guide to learn how to use the Search/Export tool in myUF Marketplace to:

1. Perform a **Simple Search** of purchase orders or requisitions.
2. Use filters to fine tune the result set.
3. View the results easily using the navigation tools.
4. Use the **Advanced Search** to search by parameters based on information within requisitions or purchase orders such as specific supplier(s), searching on ChartField values, searching on a specific amount, or commodity code, etc.
5. Use the **Save Search** to save the search and reuse later.
6. Export the search and save a default export template.
7. Set up a **Recurring Export**.

To access myUF Marketplace as a Shopper:

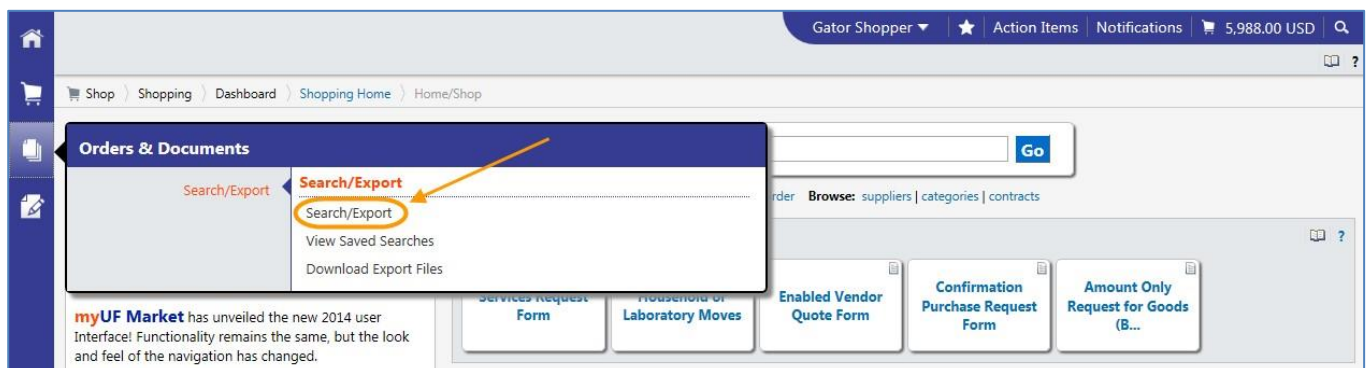
- a. Log on to <http://my.ufl.edu> using your GatorLink username and password.
- b. Click **Nav bar > Main Menu > My Self Service > myUF Marketplace** for the UF_N_MKT_Shopper.
- c. Click **Nav bar > Main Menu > Financials > eProcurement > myUF Marketplace** for the UF_N_MKT_Shopper_Req role (to shop).

To access myUF Marketplace as a Requestor or Approver:

- a. Log on to <http://my.ufl.edu> using your Gator Link username and password.
- b. Click **Nav bar > Main Menu > Financials > eProcurement > myUF Marketplace**.

To go to the **Search/Export** page:

Click the **Orders & Documents** icon on the left side of the page > Click the **Search Export** link.

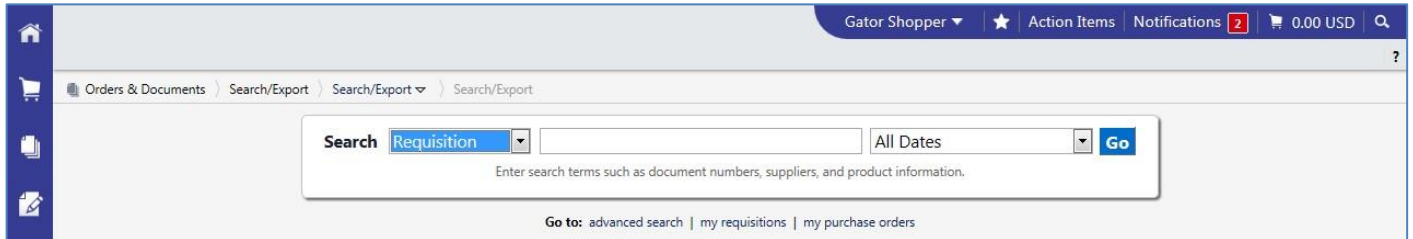


Use the Search Features

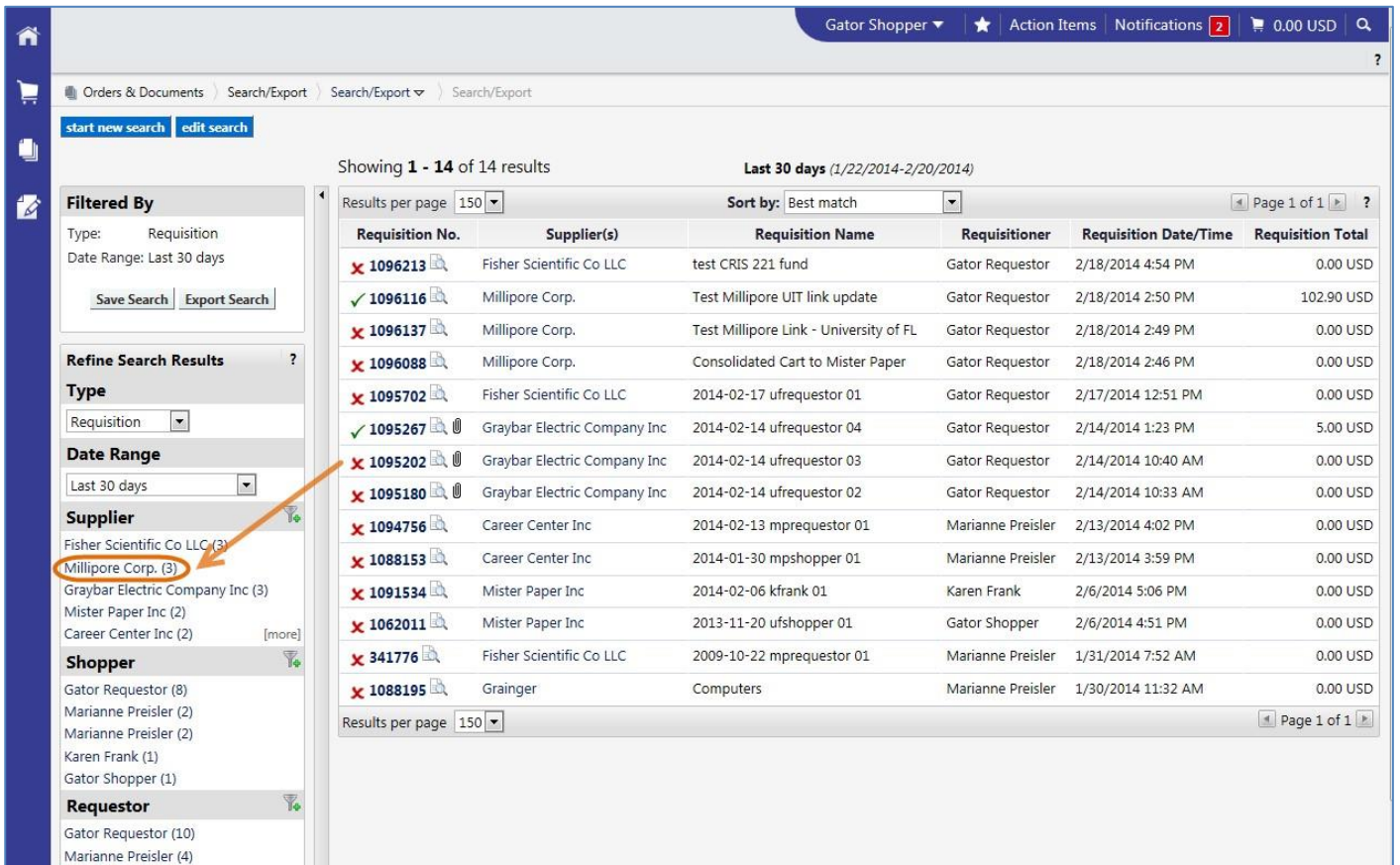
1. For this example, click the **Search** dropdown menu.
2. Click the **Requisition** list item.
3. Click the **All Dates** dropdown menu.
4. Click the **Last 30 days** list item (Or use the **Last X Days** option and enter 31 for X).

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5. Click the **Go** button.



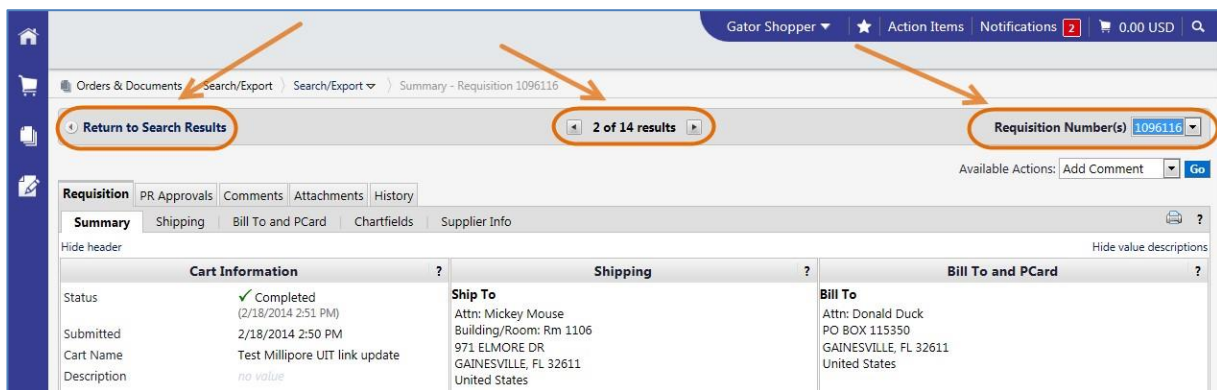
6. The system displays the results and a filter menu on the left. You may use this filter to narrow your results. For example, under the **Supplier** section, click the **Milipore Corp. (3)** link to retrieve the three requisitions that have Milipore Corp as vendor.



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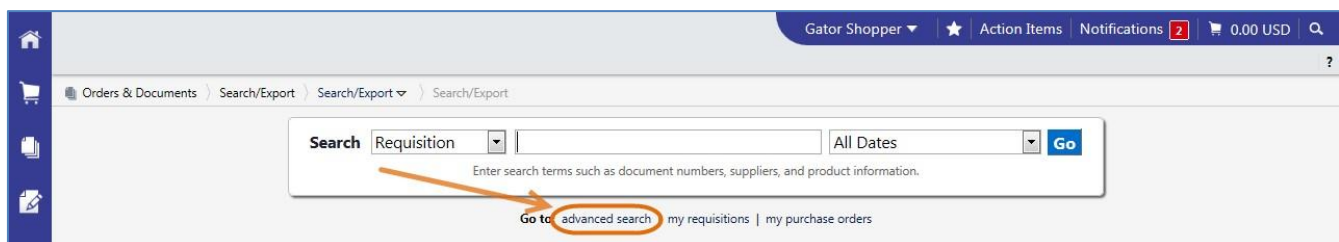
Viewing Results

1. To view a requisition, click the requisition number.
 - For example, you would click **1096116**.
2. You may use the navigation buttons within an open requisition to:
 - a. Go to the next or previous requisition by clicking the **2 of 14 results** buttons (The number varies depending on the number of requisitions in the search results).
 - b. Skip to another requisition by clicking the **Requisition Number(s)** dropdown menu to select a requisition number.
 - c. Return to the Search Results by clicking the **Return to Search Results** link.



Using the Advanced Search

1. For more search capability and features, at the Search/Export page, click the **advanced search** link.



2. Click the scrollbar on the right to scroll down.
3. You may search requisitions by **ChartFields**; for example you may search by a range of Dept IDs.
 - a. Click the **Is Between** list item for the **Dept ID** ChartField.
 - b. Enter the first Dept ID of the range. For this example, enter "10960000".
 - c. Enter the first Dept ID of the range. For this example, enter "10970900".
 - d. Click the **Go** button.

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The screenshot shows a search interface titled "ChartFields" with several rows of search criteria. Each row includes a field name, a dropdown menu for the search type, a text input field, and an "Add another" button. The "Dept Id" row is highlighted with an orange rounded rectangle. An orange arrow points to the "Is Between" dropdown in the "Dept Id" row. Another orange arrow points to the "Go" button at the bottom right of the form.

Field	Search Type	Action
Account	Is Exactly	Add another Account
AM Unit	Is Exactly	Add another AM Unit
Dept Id	Is Between	Add another Dept Id
Fund	Is Exactly	Add another Fund
PO Business Unit	Is Exactly	Add another PO Business Unit
Program	Is Exactly	Add another Program
Project	Is Exactly	Add another Project
Source Of Funds	Is Exactly	Add another Source Of Funds

4. Click the scrollbar on the right to scroll up.
5. Make sure to narrow your search. For example, click the **Date** dropdown menu.
 - a. Click the **Fiscal Year-To-Date** list item.
 - b. Click the **Go** button.

Using the Search Export to Research POs and Requisitions

Go to: simple search | my requisitions | my purchase orders

Search simple search

Go

Requisition Identification

Requisition Number(s)

Requisition Name

Requisition Information

Shopper

Requestor

Date Submit Date All Dates

Total Amount

Supplier

Item/Product Information

Catalog Number(SKU)

Product Description

Commodity Code

Form Name

Form Type

Product Flags

- Controlled substance
- Green
- Rad Minor
- Recycled
- Toxin

Contract Information

Contract Number

Purchase Order Identification

Purchase Order Number(s)

Workflow

Current Workflow Step

Calendar

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

Fiscal

- Fiscal Year-To-Date
- Previous Fiscal Year

Other

- Before X Date
- After X Date
- Last X Days
- Next X Days
- Before the Last X Days
- After the Last X Days

Saving a Search

1. Click the **Save Search** button on the left hand side of the Results page, within the Filter.

Orders & Documents Search/Export Search/Export Search/Export

start new search edit search

Showing 1 - 14 of 14 results Last 30 days (1/23/2014-2/21/2014)

Results per page: 150 Sort by: Best match Page 1 of 1

Requisition No.	Supplier(s)	Requisition Name	Requestioner	Requisition Date/Time	Requisition Total
1096213	Fisher Scientific Co LLC	test CRIS 221 fund	Gator Requestor	2/18/2014 4:54 PM	0.00 USD
1096116	Millipore Corp.	Test Millipore UIT link update	Gator Requestor	2/18/2014 2:50 PM	102.90 USD
1096137	Millipore Corp.	Test Millipore Link - University of FL	Gator Requestor	2/18/2014 2:49 PM	0.00 USD
1096088	Millipore Corp.	Consolidated Cart to Mister Paper	Gator Requestor	2/18/2014 2:46 PM	0.00 USD
1095702	Fisher Scientific Co LLC	2014-02-17 ufrequestor 01	Gator Requestor	2/17/2014 12:51 PM	0.00 USD

Filtered By

Type: Requisition

Date Range: Last 30 days

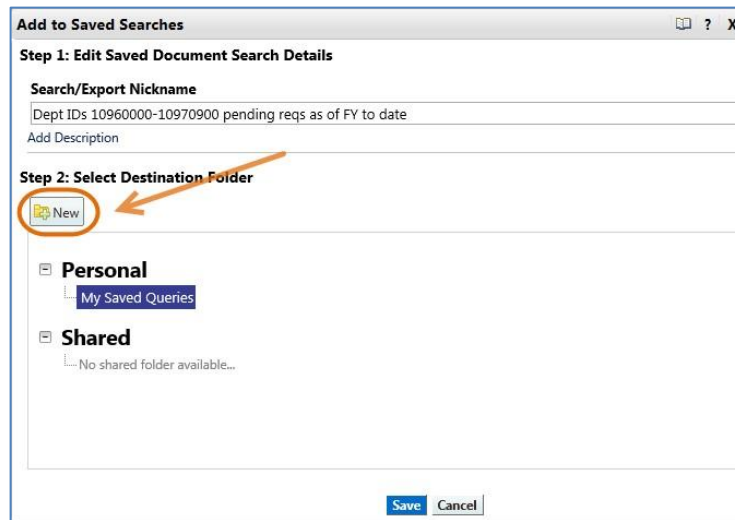
Save Search **Export Search**

Refine Search Results

Type

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2. Enter a name for the search in the **Document Search Nickname** field. For example, enter "Dept IDs 10960000-10970900 pending reqs as of FY to date."
3. Click the **My Saved Queries** folder (you will have to create a new folder) in the dialog box to select and click the **Save** button > **Close** button.

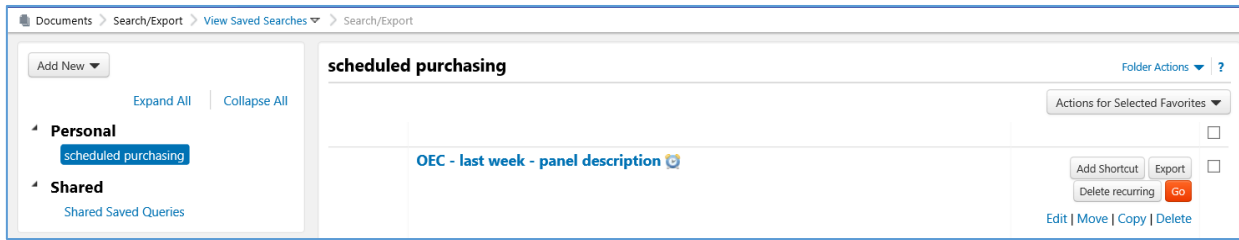


4. To retrieve a saved search, click the **View Saved Searches** link on the flyout menu that appears when you click **Search/Export** in the breadcrumbs.



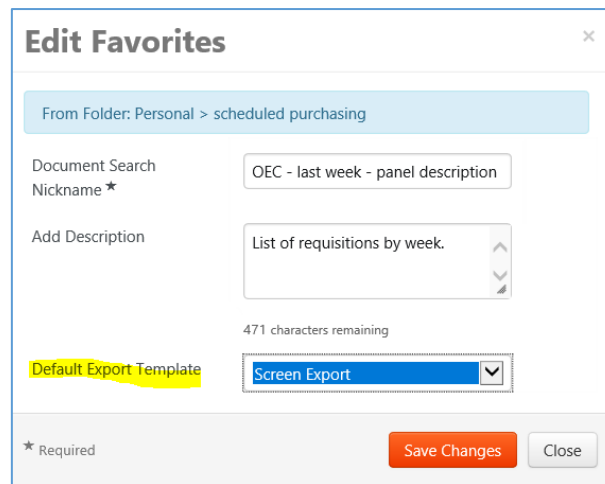
5. Click under Personal or Shared to open saved searches.
 - Click the Go button on the far right to rerun your saved search.
 - Click the Add Shortcut button to add the saved search at the bottom of the Search Export page for quick access and use in the future. To edit the search, return to the View Saved Searches link and edit in the saved search there.
 - Click the Edit link to select a Default Export Template.

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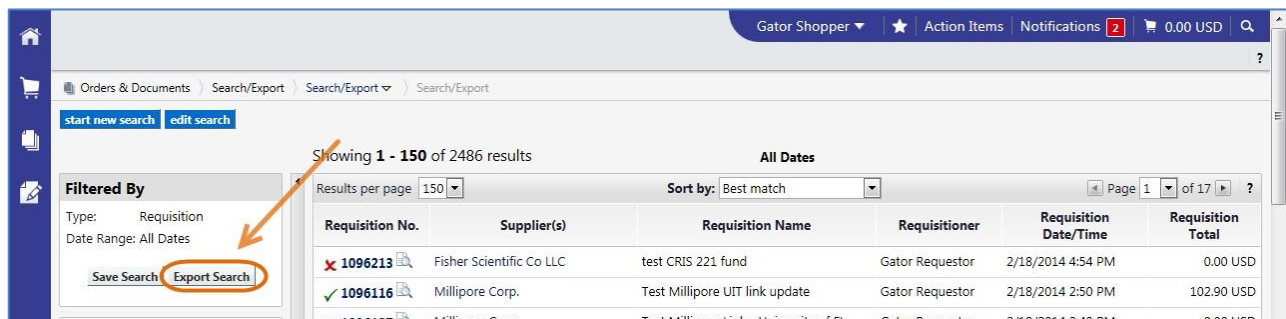
Use the Default Export Template to select whether the export to Excel should be one of the following:

- Screen Export
- Transaction Export
- Full Export



Exporting a Search

1. Click the **Export Search** button to export the results to a .csv or Excel file.



2. Enter information needed into the Request Export dialog box such as:
 - a **File Name** – for example, enter "Dept IDs pending FY TD".

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- b **Description** – for example, enter "Dept IDs 10960000 to 10970900 pending requisitions as of FY to date."
- c The **Request Export Template** will now automatically display the defaulted export format chosen earlier.
- d Click the **Submit Request** button.

Document Search Export

Request Export (Step 1 of 1)

File Name * Requisitions by Week

Description

Request Export Template Transaction Export

Description System Default Transaction Export

* Required **Submit**

3. To retrieve the file; click the **Download Export Files** link in the flyout menu that displays when clicking Search/**Exports** in the breadcrumbs.
 - a. Check the **Export Status** column and wait until it displays "Complete" to click the .zip file name, then click the **Open** button.
 - b. Double-click the .csv list item.
4. Click the **Recurring Exports** tab when in the **Download Export Files** page, to set up a recurring export.
 - Click the **Create from Saved Search** button or the **Create New Search** button to set this up.

For further help email procurement@ufl.edu or contact Procurement Services Help Desk at 392-1335.