

Saving and Exporting Searches in myUF Marketplace

Overview

This instruction guide is designed to show how to save searches in myUF Marketplace using filters at the top to narrow down your search. For example, you can search by:

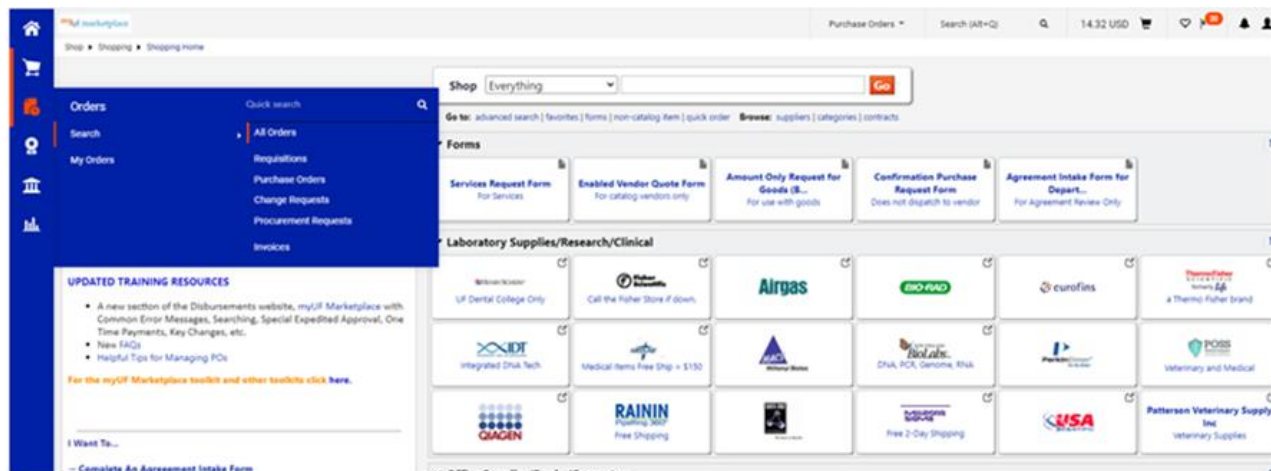
- Date range
- Change Request Status (Pending)
- ChartFields including Projects and PO Business Unit ranges or Dept ID

You can drill down through results using the filters on the left menu, such as Form type.

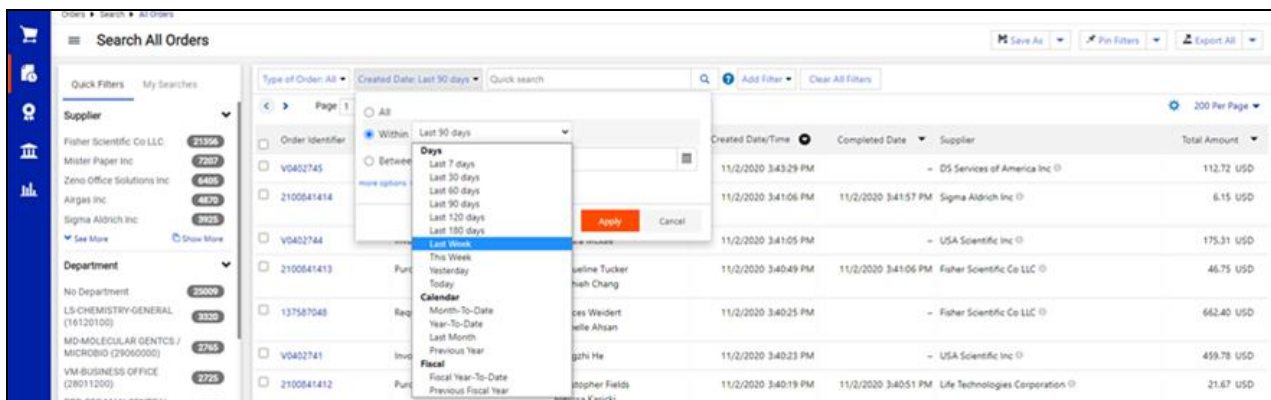
1. Log on to **http://my.ufl.edu** using your Gator Link username and password.
2. **Click Nav bar > Main Menu > Financials > eProcurement > myUF Market.**

To search for purchase orders:

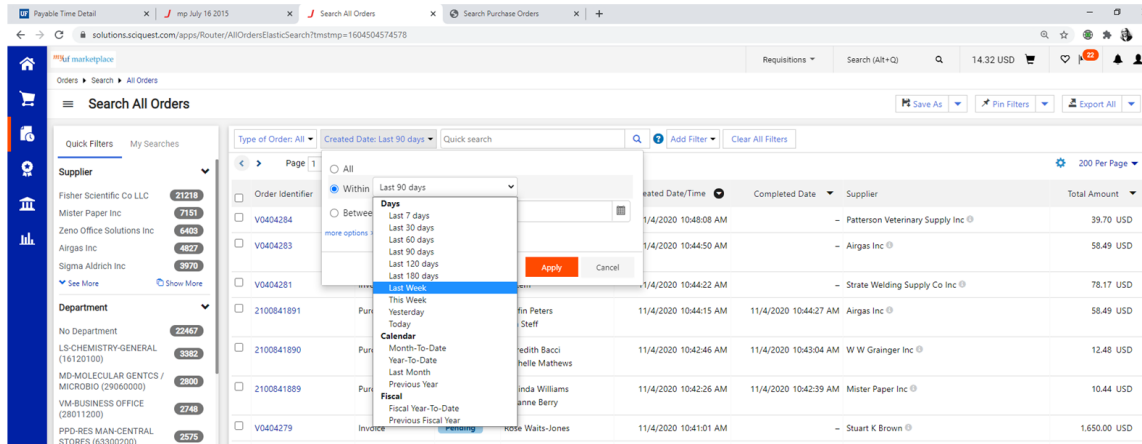
1. Click the **Orders** icon on the left side of the page > Click **Orders > All Orders (or Purchase Orders, Invoices, etc. this works with all of these.)**



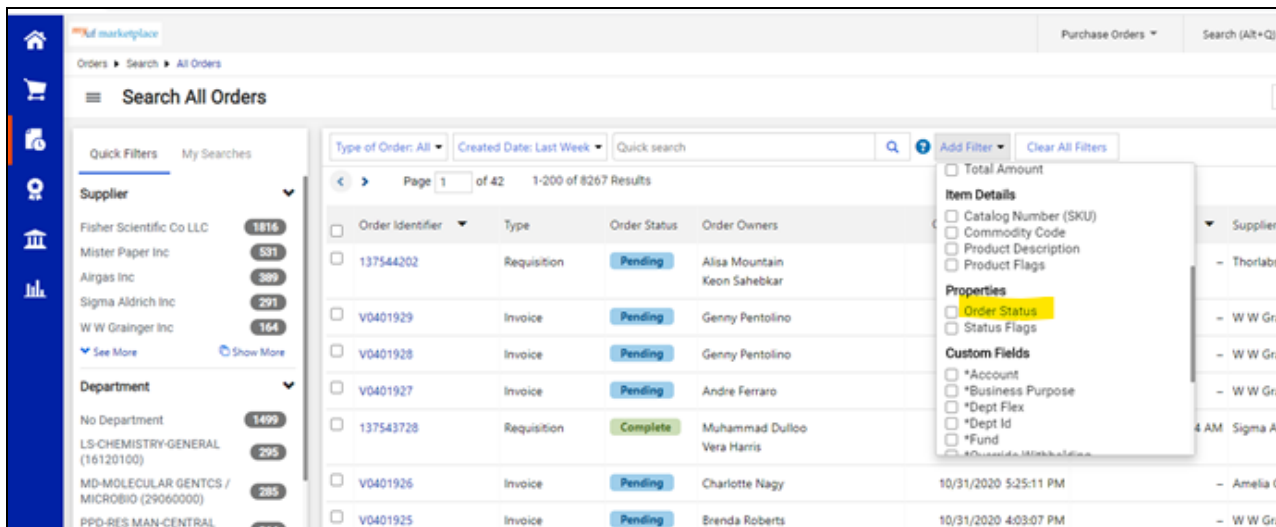
2. The results will default to the **Last 90 Days**. You can change that by clicking on the Created Date filter at the top and opening the box for more options. If you would like to save a recurring report, select Last Week or Last Month.



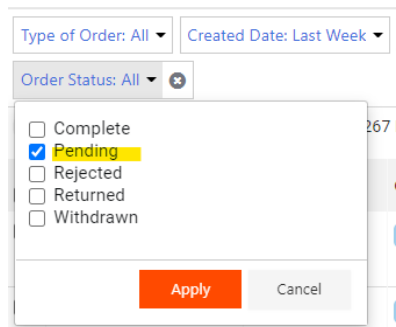
For example, if you click on the Last 90 Days dropdown, you can select Last Week:



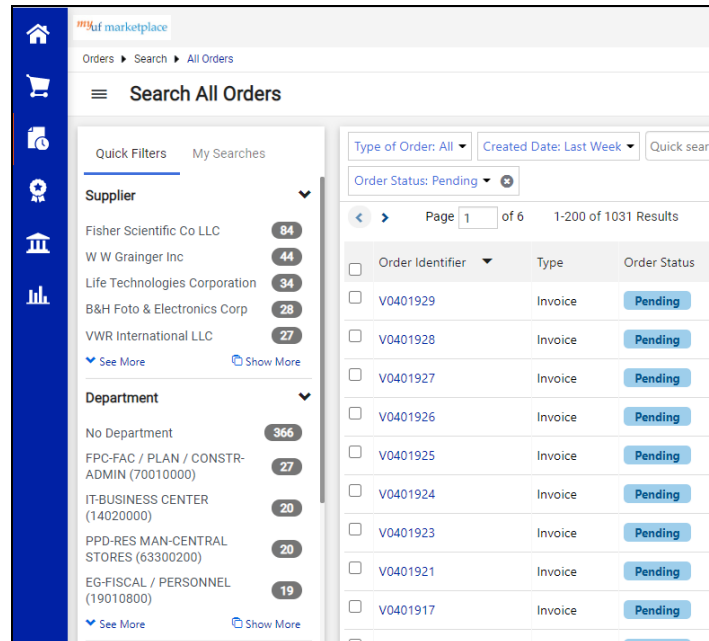
- To apply more filters, click the Add Filter box on the right. Scroll down the list to see more filters. For example, you can click on the Order Status box.



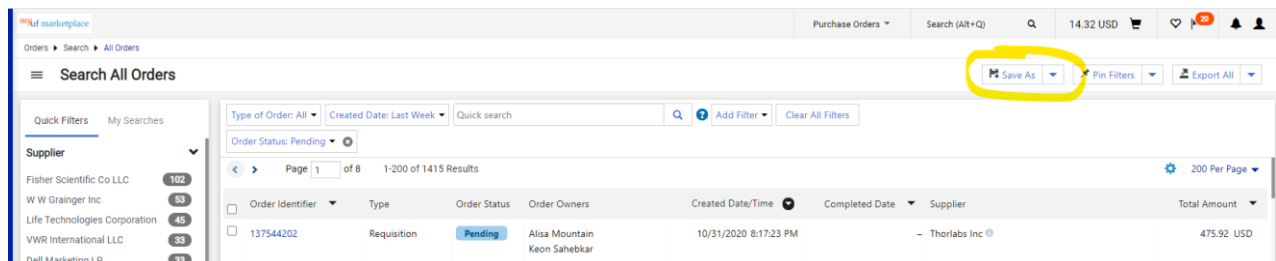
Use this filter to see which orders are still pending in workflow. Select Pending when the options are shown and click the Apply button.



- You can use the filter on the left to further narrow down the results. You can click on Show More for each section to get a complete list.



To save the search for later use with the same parameters, click on Save As on the top right.



At the Dialog box, give the Search an easily identifiable name:

×

Save Search

Step 1: Details

Nickname *

Add Description

Step 2: Select Folder Destination

Add New

Personal

scheduled purchasing

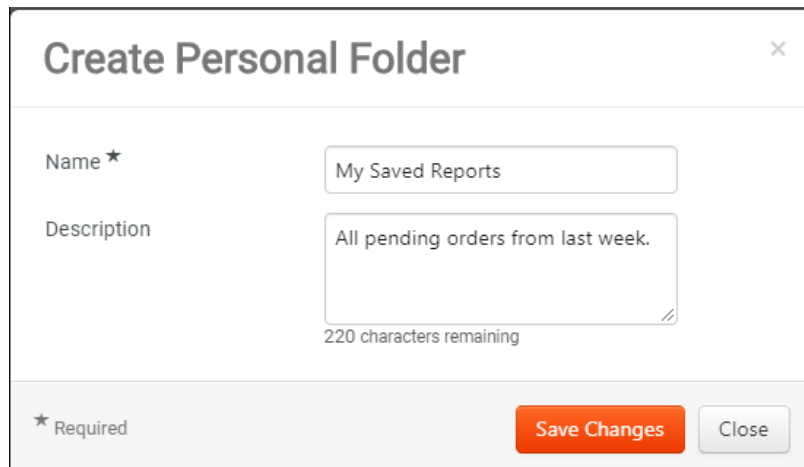
Shared

You have no shared searches.

★ Required

Save Close

Select a Folder Destination by clicking on Personal, then Add New on the right and naming your new folder. Click on Save Changes, then on Save again.



Create Personal Folder

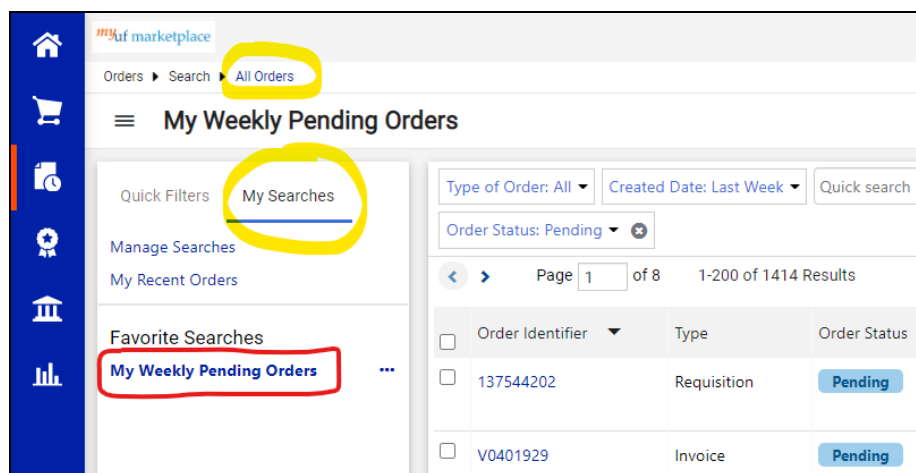
Name ★

Description

220 characters remaining

★ Required Save Changes Close

To find your Saved Search, click on My Searches in the menu where you saved it. So if you save a search in Requisitions, to find it you need to return to Requisitions first, then My Searches.



Orders ▸ Search ▸ All Orders

My Weekly Pending Orders

Quick Filters: My Searches

Manage Searches

My Recent Orders

Favorite Searches: My Weekly Pending Orders

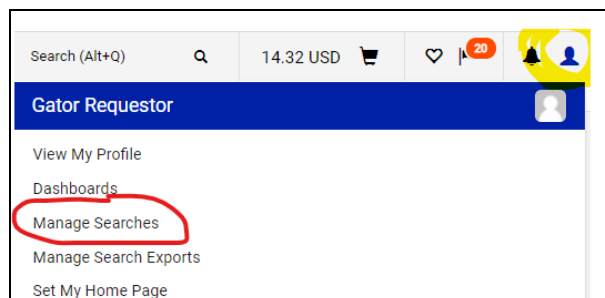
Type of Order: All Created Date: Last Week Quick search

Order Status: Pending

Page 1 of 8 1-200 of 1414 Results

<input type="checkbox"/>	Order Identifier	Type	Order Status
<input type="checkbox"/>	137544202	Requisition	Pending
<input type="checkbox"/>	V0401929	Invoice	Pending

However, you can also access your Saved Searches by clicking on your profile icon on the top right, then on Manage Searches.

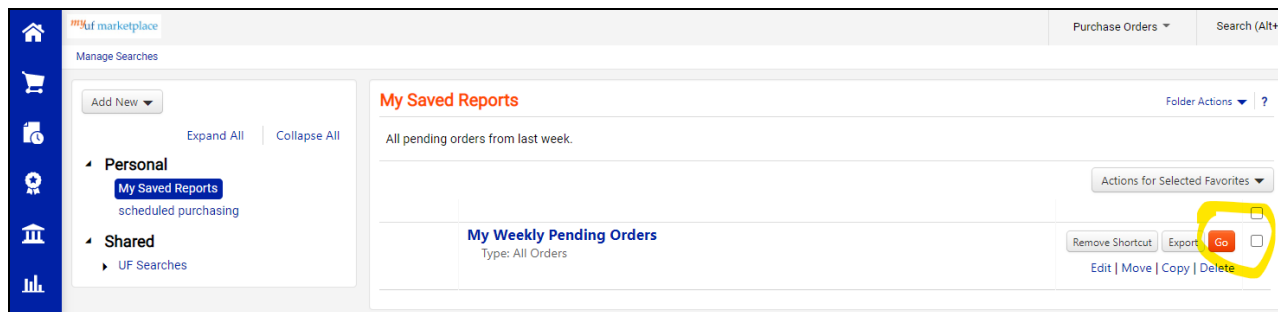
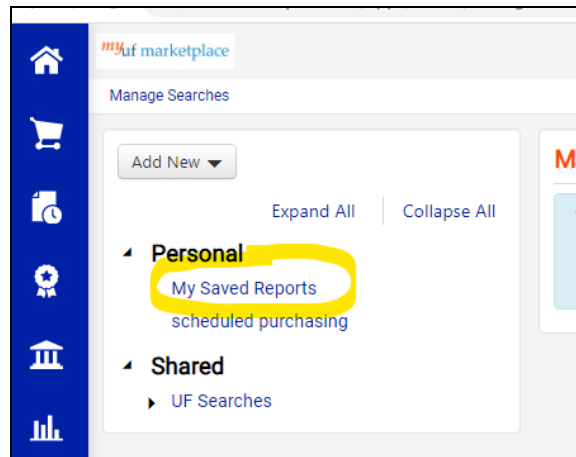


Search (Alt+Q) 14.32 USD 20

Gator Requestor

- View My Profile
- Dashboards
- Manage Searches
- Manage Search Exports
- Set My Home Page

Click on My Saved Reports to open the folder, then your saved report will show on the right.



All you need to do now to run it is to click on Go.

If you would like to Export to Excel, click the Export button.

Export All Orders

Export Request Options (Step 1 of 1)

Title *

My Weekly Pending Orders

76 characters remaining

Type

Screen Layout

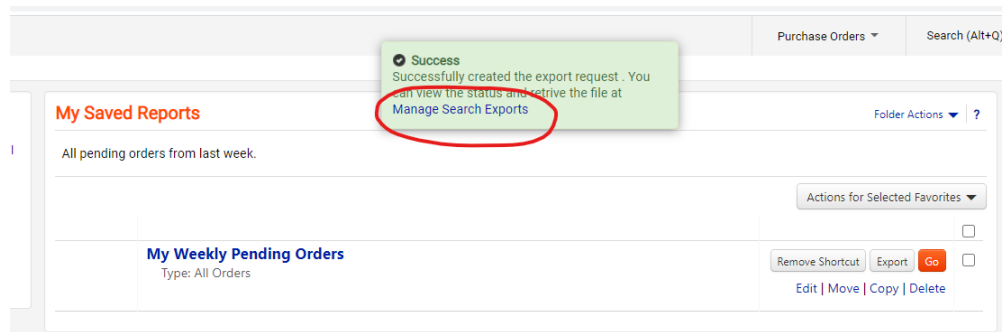
Format

Excel

★ Required

Submit

To retrieve the Excel spreadsheet, click on Manage Search Exports in the green bubble, or from your User Profile icon.



Click on the link to the Excel once it is Completed:

Manage Search Exports

Manage Exports

Export Requests

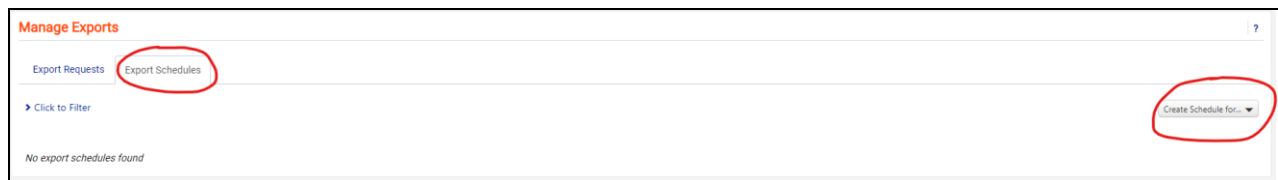
Export Schedules

Click to Filter

Refresh this Page

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
My Weekly Pending Orders	Completed	All Orders	Screen Layout (Excel)	11/2/2020 4:23:58 PM	11/2/2020 4:24:12 PM	11/9/2020	Total Records: 1398	Delete
Export request for Change Request	Completed	Change Request	Screen Layout (Excel)	10/28/2020 12:31:11 PM	10/28/2020 12:31:13 PM	11/4/2020	Total Records: 2	Delete

If you would like this report to be recurring, click on Export Schedules tab, then on the Create Schedule For... button on the right, to set up a schedule for it to run once a week and export, ready for you to just click the link to get the results. You will need to have a search saved first, with a Last Week or Last Month time range.



When you click on the Create Schedule For...button, select a document type that matches your saved search. For this example, the saved search is for All Orders, not Purchase Orders.

The Dialog box will show your saved search. From there you may make selections such as Frequency and how often the search will occur, as well as the Export. Make sure to click on Save.

Schedule Export

Scheduled exports are queued for processing after midnight local time to be available the following morning.

Search Type

All Orders

Search To Export *

My Weekly Pending Orders

Type *

Screen Layout

Format

Excel

Starts On *

11/03/2020

mm/dd/yyyy

Frequency *

Monthly

Occurs Every *

1

month(s)

By the Week and Day of the Month

On The *

First

Monday

of the month

Export Until *

☒ Ends After

1

 occurrences
 ☐ Ends By ☐ No End Date

★ Required

Save

Even though it is set up for Last Week, you can select to have the Frequency as Daily.

Schedule Export

Scheduled exports are queued for processing after midnight local time to be available the following morning.

Search Type

All Orders

Search To Export *

My Weekly Pending Orders

Type *

Screen Layout

Format

Excel

Starts On *

11/03/2020

mm/dd/yyyy

Frequency *

Daily

Export Until *

☒ Ends After

1

 occurrences
 ☐ Ends By ☐ No End Date

★ Required

Save

The system will save the scheduled report:

Manage Exports

Export Requests

Export Schedules

Click to Filter

Create Schedule for...

Search To Export	Status	Created	Export Content	Frequency	Ending	Next Run	Actions
My Weekly Pending Orders	Enabled	11/2/2020 4:33:26 PM	Search Type Export Content	Daily More	1 of 1 remain	11/3/2020 12:00:00 AM	Edit
			Screen Layout- Excel				

To see the results of the scheduled report, return to the Manage Exports link on your profile icon, then click on the Manage Exports tab to see the results of the scheduled export:

Manage Search Exports







Manage Exports

Export Requests

Export Schedules

Click to Filter

Refresh this Page

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
 Scheduled Export For: My Weekly Pending Orders	Completed	All Orders	Screen Layout (Excel)	11/3/2020 12:00:03 AM	11/3/2020 12:00:22 AM	11/10/2020	Total Records: 1369	 Delete
 My Weekly Pending Orders	Completed	All Orders	Screen Layout (Excel)	11/2/2020 4:23:58 PM	11/2/2020 4:24:12 PM	11/9/2020	Total Records: 1398	 Delete
 Export request for Change Request	Completed	Change Request	Screen Layout (Excel)	10/28/2020 12:31:11 PM	10/28/2020 12:31:13 PM	11/4/2020	Total Records: 2	 Delete

Click below to see a short video on:

- [Saving a Search](#)
- [Exporting a Saved Search to Excel](#)
- [Scheduling a Saved Search to run daily, weekly or monthly](#)

For assistance, e-mail procurement@ufl.edu or contact the Procurement Services Help Desk at 392-1335.