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.**)

| ñ | The schedules | | | | Putha | ae Orders * Search (Alt+Q | a 14.32 USD | * *** * 1 |
|----------|--|--|---|---|---|--|---|--|
| 2 | | Oxid much | Shop Everything | v) | | 60 | | |
| ه و ا | Orders Search | Chick search Q | | tes forms non-catalog Xem quick o | der Breuse sigsfers angeries |) contracts | | |
| Â | My Ordens | Requisitions Purchase Ordens Change Requests Procurement Requests | Services Request Form For Services | Enabled Vender Quote Form For catalog vendors only | Amount Only Request for Goods (B., For use with goods | Confirmation Purchase Request Form Cost not dispatch to vendor | B Agreement Intake Form For Depart For Agreement Navies Only | |
| ыL. | | Invoices | Laboratory Supplies/R | esearch/Clinical | | | | |
| | | ursements website, myUE Marketplace with | Stream Kinger Uf Dental College Only | Call the Folder Store & down. | Airgas | eionia Eionia | ල් eurofins | a Thermo Fahrer brand |
| | Common Error Messages, Time Payments, Key Chan New FalQs Height Tos for Managing Far the myOF Marketplace tool | POI | Contraction of the sector | Medical frems Pres Disp + \$150 | <u>A</u> | BioLabs. Crus. PCR. Genome Rhus | P | POSS Weinary and Medical |
| | | | GAAGEN | RAININ | | Contraction Contraction | cusa d | (Patterson Veterinary Suppl Inc Veterinary Supples |
| | I Want Ta Complete An Agreeement Int | take Form | W Office Freedlag Backs | ll | | | | |

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.

| Search All Orders | | | 🗎 Save As 💌 🧭 Pin Fin | ers 💌 🕹 Export All 💌 |
|--|----------------------------------|--|---|----------------------|
| Quick Filters My Searches | Type of Order: All Created Date | Last 90 days - Quick search Q | Add Filter Cear All filters | |
| Supplier v | C > Page 1 O All | | | O 200 Per Page • |
| Fisher Scientific Co LLC | 📋 Order identifier 🔹 Within | 0 | Created Date/Time O Completed Date - Supplier | Total Amount |
| Miller Paper Inc 7200 Zeno Office Solutions Inc 7200 | O voacetas O Betwee | Last 7 days | 11/2/2020 3:43:29 PM - DS Services of America Inc (1) | 112.72 USD |
| | D 2100641414 | Last 60 days Last 90 days | 11/2/2020 3:41:06 PM 11/2/2020 3:41:57 PM Sigma Aldrich Inc () | 6.15 USD |
| Sigma Aldrich Inc Sigma Aldrich | - | Last 120 days Apply Cancel | | |
| * See More O Shaw More | O V0402744 | Last Week | 11/2/2020 3.41:05 PM - USA Scientific Inc () | 175.31 USC |
| Department Vo Department | C 2100541413 Pure | Today high Chang | 11/2/2020 3:40:49 PM 11/2/2020 3:41:06 PM Fisher Scientific Co LLC © | 46.75 USD |
| LS-CHEMISTRY-GENERAL (16120100) | C 137587048 Reg | Calendar Month-To-Date ces Weidert Year-To-Date elle Ahsan | 11/2/2020 3:40:25 PM - Fisher Scientific Co LLC () | 662.40 USD |
| MD-MOLECULAR GENTCS / MICROBIO (29060000) | U V0402741 8140 | Last Month Previous Year poth Ha | 11/2/2020 3:40:23 PM ~ USA Scientific Inc () | 459.78 USC |
| VM-BUSINESS OFFICE (28011200) | C 2100541412 Pure | Flacal Flacal Year-To-Date Previous Flacal Year Dopher Fields | 11/2/2020 3:40.19 PM 11/2/2020 3:40.51 PM Life Technologies Corporation @ | 21.67 USD |

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

| UF Paya | able Time Detail 🛛 🗙 📔 mp July 16 2 | 2015 | × J | Search All Order | s 🗙 🕲 Search Purcha | ise Orders X + | | | | | | | - 0 |
|-------------------|---|-----------|-----------------------|----------------------------|--------------------------------|-------------------------------|-----|-----------------------|-----------------------|---------------------------|---------------|--------------|------------|
| \leftrightarrow | C 🔒 solutions.sciquest.com/apps/Rou | iter/AllC | OrdersElasticSearch?t | mstmp=16045 | 04574578 | | | | | | | 2 \$ 6 | B * 🚯 |
| â | ^{my} uf marketplace | | | | | | | | Requisitions 👻 | Search (Alt+Q) Q | 14.32 USD 📜 | ♡ ⊧ | 2 🔺 . |
| | Orders Search All Orders | | | | | | | | | | | | |
| | ≡ Search All Orders | | | | | | | | | R Save As | ▼ Pin Filters | ▲ B | oport All |
| í0 | Quick Filters My Searches | | Type of Order: All 👻 | Created Date | e: Last 90 days 👻 Quick search | | 0 | Add Filter - Cle | ar All Filters | | | | |
| õ | Supplier 🗸 | 1 | Page 1 | O All | | | | | | | | \$ 20 | 0 Per Page |
| <u>ش</u> | Fisher Scientific Co LLC 21218 | | Order Identifier | Within | Last 90 days Days | ~ | | eated Date/Time | Completed Date 💌 | Supplier | | Total | Amount |
| - | Mister Paper Inc 7151 | l c | V0404284 | ⊖ Betwee | Last 7 days | | m | 1/4/2020 10:48:08 AM | - | Patterson Veterinary Supp | bly Inc 🔍 | | 39.70 USD |
| սև | Zeno Office Solutions Inc 6403 Airgas Inc 4827 | Ē | V0404283 | more options a | Last 30 days Last 60 days | | | 1/4/2020 10:44:50 AM | - | Airgas Inc O | | | 58.49 USD |
| | Sigma Aldrich Inc 3970 | | | | Last 90 days Last 120 days | Apply Can | cel | | | | | | |
| | ✓ See More Show More | C | V0404281 | | Last 180 days Last Week | em | _ | 1/4/2020 10:44:22 AM | - | Strate Welding Supply Co | Inc 🐵 | | 78.17 USD |
| | Department V | l c | 2100841891 | Pun | This Week Yesterday | fin Peters | | 11/4/2020 10:44:15 AM | 11/4/2020 10:44:27 AM | Airgas Inc 🛛 | | | 58.49 USD |
| | No Department 22467 | | | | Today Calendar | Steff | | | | | | | |
| | LS-CHEMISTRY-GENERAL (16120100) | C | 2100841890 | Pur | Month-To-Date Year-To-Date | redith Bacci helle Mathews | | 11/4/2020 10:42:46 AM | 11/4/2020 10:43:04 AM | W W Grainger Inc 🖯 | | | 12.48 USD |
| | MD-MOLECULAR GENTCS / MICROBIO (29060000) 2800 | 1 c | 2100841889 | Pur | Last Month Previous Year | inda Williams | | 11/4/2020 10:42:26 AM | 11/4/2020 10:42:39 AM | Mister Paper Inc ® | | | 10.44 USD |
| | VM-BUSINESS OFFICE (28011200) (2748) | | | | Fiscal Fiscal Year-To-Date | anne Berry | | | | | | | |
| | PPD-RES MAN-CENTRAL STORES (63300200) 2575 | C | V0404279 | Invo | Previous Fiscal Year | tose Waits-Jones | | 11/4/2020 10:41:01 AM | - | Stuart K Brown 🐵 | | 1. | 650.00 USD |

3. 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.

| * | "Nef marketplace | | | | | | | | Purchase Orders * | Sear | rch (Alt+Q |
|----------|--|-----|--------------------------|----------------------|--------------|---------------------------------|---|--|-------------------|------|------------|
| | Orders + Search + All Orders | | | | | | | | | | |
| Ξ | ■ Search All Orders | | | | | | | | | | |
| 6 | Quick Filters My Searches | Тур | pe of Order: All 👻 Creat | ed Date: Last Week • | Quick search | | ٩ | 🕄 Add Filter 🕶 🛛 | | | |
| <u>e</u> | Supplier 🗸 | ٠ | > Page 1 of | 42 1-200 of 826 | 7 Results | | | Total Amou Item Details | int | | |
| 俞 | Fisher Scientific Co LLC 1816 | 0 | Order Identifier 💌 | Type | Order Status | Order Owners | | Catalog Nu | Code | * | Supplie |
| ա | Mister Paper Inc SST Airgas Inc SSS | 0 | 137544202 | Requisition | Pending | Alisa Mountain Keon Sahebkar | | Product De Product Fla Properties | | ŀ | Thorlab |
| | Sigma Aldrich Inc 201 W W Grainger Inc 164 | 0 | V0401929 | Invoice | Pending | Genny Pentolino | | Order Statu Status Flag | | | wwg |
| | ♥ See More O Show More | 0 | V0401928 | Invoice | Pending | Genny Pentolino | | Custom Fields | | - | W W G |
| | Department 🗸 | 0 | V0401927 | Invoice | Pending | Andre Ferraro | | *Account *Business F •Dept Flex | Purpose | - | w w G |
| | No Department 1499 LS-CHEMISTRY-GENERAL 295 | 0 | 137543728 | Requisition | Complete | Muhammad Dulloo Vera Harris | | *Dept Hex *Pept Id *Fund *Fund | labbalatan | 4 AM | Sigma / |
| | MD-MOLECULAR GENTCS / MICROBIO (29060000) | 0 | V0401926 | Invoice | Pending | Charlotte Nagy | | 10/31/2020 5:25: | 11 PM | - | Amelia |
| | PPD-RES MAN-CENTRAL | 0 | V0401925 | Invoice | Pending | Brenda Roberts | | 10/31/2020 4:03: | 07 PM | - | WWG |

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

| Type of Order: All | Created | Date: Last We | ek 🕶 🤇 |
|--|---------|---------------|------------|
| Order Status: All 👻 | Θ | | |
| Complete Pending Rejected Returned Withdrawn | | | 267 R C |
| | Apply | Cancel | |

4. 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.

| * | ^{my} uf marketplace | | |
|-----|--|---|-----------|
| | Orders Search All Orders | | |
| | \equiv Search All Orders | | |
| ío | Quick Filters My Searches | Type of Order: All Created Date: Last Week Quic | ck searcl |
| | Supplier 🗸 | Order Status: Pending 👻 😨 | |
| | Fisher Scientific Co LLC 84 | Page 1 of 6 1-200 of 1031 Results | s |
| Î | W W Grainger Inc 44 | Order Identifier 🔻 Type Order Sta | atus |
| lik | Life Technologies Corporation 34 B&H Foto & Electronics Corp 28 | U V0401929 Invoice Pending | g |
| | VWR International LLC (27) | UV0401928 Invoice Pending | g |
| | ✓ See More Show More | □ V0401927 Invoice Pending | g |
| | Department 🗸 | V0401926 Invoice Pendin | - - |
| | No Department 366 | | 9 |
| | FPC-FAC / PLAN / CONSTR- ADMIN (70010000) 27 | V0401925 Invoice Pending | g |
| | IT-BUSINESS CENTER (14020000) 20 | V0401924 Invoice Pending | g |
| | PPD-RES MAN-CENTRAL | V0401923 Invoice Pending | g |
| | | UV0401921 Invoice Pending | g |
| | (19010800) 19 | V0401917 Invoice Pendin | a |
| | ✓ See More Show More | | |

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

| ^{my} uf marketplace | | | | | Purchase Orders * | Search (Alt+Q) Q | 14.32 USD 📜 | ♡ 🔎 🔺 1 |
|--|------------------------------|----------------------------------|---------------------------------|------------------------|-------------------|------------------|-------------|--------------------|
| Orders Search All Orders | | | | | | | | |
| E Search All Orders | | | | | | | | ▼ Z Export All ▼ |
| Quick Filters My Searches | Type of Order: All 👻 Created | d Date: Last Week 🕶 Quick search | | Q 🕜 Add Filter 🕶 Clear | All Filters | | | |
| Supplier 🗸 | Order Status: Pending 👻 🔕 | | | | | | | |
| Fisher Scientific Co LLC 102 | < > Page 1 of 8 | 1-200 of 1415 Results | | | | | | 🔅 🛛 200 Per Page 👻 |
| W W Grainger Inc 53 | Order Identifier 🔻 | Type Order Status | Order Owners | Created Date/Time | Completed Date | Supplier | | Total Amount 💌 |
| Life Technologies Corporation (45) VWR International LLC (33) | 137544202 | Requisition Pending | Alisa Mountain Keon Sahebkar | 10/31/2020 8:17:23 PM | | - Thorlabs Inc 🖲 | | 475.92 USD |
| Dell Marketing LP 33 | | | Keun saneukar | | | | | |

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 N Personal scheduled purchasing Shared You have no shared searches. | ew 🔻 |
| * Required Save | Close |



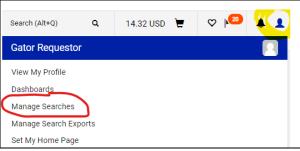
Select a Folder Destination by clicking on Personal, then Add New on the right and naming your new folder. Click on Save Changes, then on Save agan.

| Create Personal Folder | | | | | |
|------------------------|------------------------------------|-----|--|--|--|
| Name * | My Saved Reports | | | | |
| Description | All pending orders from last week. | | | | |
| | 220 characters remaining | | | | |
| * Required | Save Changes Ch | ose | | | |

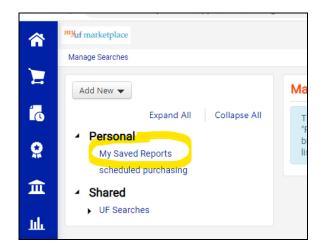
To find your Saved Search, click on My Searches in the menu where you saved it. So if you save a search in Requisitions, to find it you need to return to Requisitions first, then My Searches.

| ^ | ^{my} uf marketplace | | | | |
|----------|--------------------------------|-----|--------------------------|---------------------|--------------|
| | Orders 🕨 Search 🕨 All Orders | | | | |
| | \equiv My Weekly Pending Ord | ers | | | |
| íc | Quick Filters My Searches | Тур | e of Order: All 👻 Create | d Date: Last Week 🔻 | Quick search |
| Q | Manage Searches | Ore | der Status: Pending 👻 😣 | | |
| | My Recent Orders | < | > Page 1 of 8 | 3 1-200 of 1414 F | Results |
| Î | Favorite Searches | | Order Identifier 🔻 | Туре | Order Status |
| հր | My Weekly Pending Orders | | 137544202 | Requisition | Pending |
| | | | 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.



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



| ^ | ^{my} uf marketplace | | Purchase Orders 👻 | Search (Alt+ |
|----------|--|--|--|---------------------------------------|
| | Manage Searches | | | |
| | Add New 🔻 | My Saved Reports | Folder | Actions 🔻 💡 |
| í o | Expand All Collapse All | All pending orders from last week. | | |
| 0 | Personal My Saved Reports scheduled purchasing | | Actions for Selecter | d Favorites 🔻 |
| 血 山 | SharedUF Searches | My Weekly Pending Orders Type: All Orders | Remove Shortcut Export Edit Move Copy | |
| | | | | · · · · · · · · · · · · · · · · · · · |

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

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

| Export All Orders | | | | | |
|------------------------|--------------------------|-----|--|--|--|
| Export Request Options | (Step 1 of 1) | | | | |
| Title * | My Weekly Pending Orders | | | | |
| Туре | Screen Layout | | | | |
| Format | Excel | | | | |
| * Required | Sub | mit | | | |

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

| | Success | Purchase Orders Search |
|--|---|---|
| My Saved Reports | Successfully created the export request . You can view the status and entries the file at Manage Search Exports | Folder Actions 🛩 |
| All pending orders from last week. | | |
| | | Actions for Selected Favorites |
| My Weekly Pending Type: All Orders | Orders | Actions for Selected Favorites Remove Shortcut Export Go |

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 | 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.

| Manage Exports | ? |
|--|---------------------|
| Export Requests Export Schedules Click to Filter No export schedules found | Create Schedule for |
| | |

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.

mylf marketplace

| Schedule Ex | port | | × |
|-----------------------------------|---|----------------------------|---|
| | queued for processing after midnight local ti | | |
| Search Type Search To Export * | All Orders | Starts On * Frequency * | 11/03/2020 |
| Type * Format | Screen Layout Excel | Occurs Every * | 1 ▲ month(s) By the Week and Day of the Month |
| | | On The * | First V Monday V 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 Ex | port | | | × |
|-----------------------|---|-------------------------------------|------------------------------|---|
| Scheduled exports are | queued for processing after midnight lo | ocal time to be available the follo | owing morning. | |
| Search Type | All Orders | Starts On * | 11/03/2020 III | |
| Search To Export * | My Weekly Pending Orders Screen Layout | Frequency * | Daily | |
| Format | Excel | Export Until * | Ends After 1 occurrences | |
| | | | O Ends By | |
| + | | | ~ | |
| * Required | | | J | e |

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 All Orders Export Content Screen Layout- Excel | Daily More | 1 of 1 remain | 11/3/2020 12:00:00 AM | Edit 💌 |

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:

| lanage Exports | | | | | | | | |
|---|--------|---------------------------|--|----------------------------------|------------------------------------|----------------------------|--------------------------------|----------------|
| Export Requests Export Schedules | | | | | | | | |
| | | | | | | | | |
| > Click to Filter | | | | | | | | Refresh this R |
| | | | | | | | | |
| | | | | \frown | | | | |
| Title | Status | Search Type | Export Output | Created | Completed | Available Until | Details | Actions |
| $\langle \rangle$ | Status | Search Type All Orders | Export Output Screen Layout (Excel) | Created 11/3/2020 12:00:03 AM | Completed 11/3/2020 12:00:22 AM | Available Until 11/10/2020 | Details Total Records: 1369 | Actions |
| Title Coneduled Export For Ity Weekly Pending Orders | | | | | | | | |

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 <u>procurement@ufl.edu</u> or contact the Procurement Services Help Desk at 392-1335.