Custom Search with Line Item Data
For Department Purchasing Specialists
Revised 6/4/2023
Retrieving Line Item Data for Requisitions

- A custom search template has been created and shared with Department Purchasing Specialists in UD Exchange to allow an export of line item data associated with requisitions.
From the UDX Homepage, navigate to **Orders > Search > Requisitions**.
From your document search, **filter** by department, user, any custom field, etc. Once you have selected your filters, click **Export All**.
• Name your search in the Title field.
• Select User Defined Template from the Type menu.
• Select the template All Line Item Data from the Choose Template menu.
• Click Next.
To retrieve your file, select **Manage Search Exports** from the **Export All** menu or from the link in the **Success** message.
Your file will be available for download on the **Export Requests** tab.
Custom Search Templates

- A DPS may also customize and create their own templates, but they cannot be shared.
- To create a custom search template in any area of Enhanced Search (Requisitions, Purchase Orders, or Vouchers), choose:
  - **Type:** *User Defined Template*
  - **Template:** *New Template*
  - The export wizard will walk you through the steps to include on your export.
- A DPS can also search for users in order to manage user roles for their department, but there are no custom templates in this area.
Questions:
• procurement@udel.edu

Resources:
• Procurement Services Website
• Enhanced Search
• Finding Users and User Information in UD Exchange