Custom Search with Line Item Data - Department Purchasing Specialists
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 **Submit**.
To retrieve your file, select **Manage Search Exports** from the Export All menu.
Your file will be available for download on the **Export Requests** tab.
Custom Search Templates

- DPSes also have the ability to customize and create their own templates, but these cannot be shared.
- Custom search templates can be created in any area of Enhanced Search (Requisitions, Purchase Orders, and Vouchers) – simply choose Type “User Defined Template” as shown on Slide 4, and then Choose Template “New Template”. The wizard will walk you through the steps to include on your export.
- DPSes can also search for users in order to manage user roles for their department, but there are no custom templates in this area.
Resources

See also “Enhanced Search”

Procurement Services
procurement@udel.edu