

# UNIVERSITY OF DELAWARE<sup>®</sup> EXCHANGE

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.



UDX TEST SITE

Shop • Shopping Home Page

Orders

Quick search

Search

All Orders

Requisitions

Purchase Orders

Change Requests

Procurement Requests

Vouchers

Receipts

Action Items

MY ASSIGNED APPROVALS

Requisitions To Approve

Vouchers

ORDERS

My Returned Requisitions

CONTRACT

Contracts eSignature Errors

My Resources

My Resources

Product Release Library | procurement@udel.edu

Site Map

Quick Links

UD Exchange How To Guides

How Do I Buy \_\_\_\_\_ ???

Commodity Code-Account Crosswalk

Non-PO Payment Matrix

Non-Catalog Item

NEW Waiver of Bid Form

Request Contract

From the UDX Homepage, navigate to **Orders > Search > Requisitions**.

Procurement Forms

Non-PO Payment Request

Honorarium Payment Request

Subaward Request

NIIMBL Subaward Request

RFX Request (Option 2)

NSB Customer Setup

NEW Waiver of Bid Request

Office/Misc Supplies

My Draft Carts

Showing Results 1 - 16 of 16

20 Per Page

NUMBER	CART	CART TYPE	DATE ↓	TOTAL
3703294	Keen June 2023	My Drafts	2/7/2023	211.20USD

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https://usertest.sciquest.com/apps/Router/RequisitionElasticSearch?tmstmp=1685902259133

UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

Orders

Search

Requisitions

All

Search (Alt+Q)

211.20 USD

31

Logout

Search Requisitions

Save AsPin FiltersExport All

Quick FiltersMy Searches

Supplier

W B MASON CO INC5

PHILIP ROSENAU COMPANY INC3

AUCKLAND UNIVERSITY OF3

CANADIAN BROADCASTING CORPORATION3

BRIGHT CAN-ACHIEVE LIMITED3

See MoreShow More

Requisition Status

Completed31

Pending19

Withdrawn1

See MoreShow More

Department

PROCUREMENT SERVICES (04750)27

IT-ENTRPRS SYSTMS & CLOUD SVCS (04375)13

IT-INFORMATION TECHNOLOGIES (04324)3

BIOMEDICAL ENGR DEPARTMENT (03170)2

ENGLISH LANGUAGE INSTITUTE (01470)1

See MoreShow More

Prepared For

Romeo, Lauren13

Pickering, Kristen12

Submitted Date: Last 90 daysQuick searchAdd FilterClear All Filters

Page 1 of 31-20 of 51 Results20 Per Page

Requisition Number	Supplier	Requisition Name	Requisition Status	Prepared For	Submitted Date	Total Amount
3787129	AUCKLAND UNIVERSITY OF	2023-06-02 702672155 01	Pending	Maggie Hess	6/2/2023 1:14:50 PM	4,900.00 USD
3783255	BURNING GLASS INTERNATIONAL	Testing 42969 K	Completed	Lauren Romeo	6/2/2023 8:35:21 AM	93.75 USD
3783950	FASTENAL COMPANY	Keck Fastenal 053023	Pending	Yong Zhao	5/30/2023 3:26:47 PM	0.00 USD
3783282	CENTRE NATL DE LA RECHERCHE SCIENTIFIQUE	TESTING JPMC Wire Override	Completed	Lauren Romeo	5/26/2023 5:50:59 AM	4,375.00 USD
3780635	APPLE COMPUTER INC	Testing 42969 g	Completed	Lauren Romeo	5/24/2023 2:30:49 PM	1,250.00 USD
3780631	APPLE COMPUTER INC	TEST 42969 a	Completed	Lauren Romeo	5/24/2023 2:00:13 PM	1,500.00 USD
3774463	LOWE'S HOME CENTERS INC	test for case 03022423	Pending	Kristen Pickering	5/23/2023 5:05:17 PM	214.15 USD
3707525	Backbone Interconnect LLC	2023-02-13 702620425 01	Completed	William Gonzalez	5/23/2023 10:10:18 AM	50.00 USD
3779006	4WALL DC INC	Testing 42969 f	Completed	Lauren Romeo	5/19/2023 11:04:32 AM	1,500.00 USD
3726273	PHILIP ROSENAU COMPANY INC	42969 e	Completed	Lauren Romeo	5/19/2023 10:54:54 AM	11.88 USD
3777606	SQUARE ONE ELECTRIC SERVICE CO.	Testing 42969 d	Completed	Lauren Romeo	5/19/2023 10:45:59 AM	525.00 USD
3778916	4WALL DC INC	Testing 42969 e	Completed	Lauren Romeo	5/19/2023 10:28:04 AM	500.00 USD
3765483	CASSIDY PAINTING	Cassidy Powerwashing	Withdrawn	Brandon Gabriel-Perez	5/3/2023 3:18:23 PM	0.00 USD

From your document search, filter by department, user, any custom field, etc. Once you have selected your filters, click Export All.

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TEST SITE

Export Request Options (Step 1 of 4)

Title \*

Export request for Requisition

70 characters remaining

Type

User Defined Template ▾

Format

CSV

Choose Template

All Line Item Data ▾

Next >

Search Requisitions

Quick Filters

My Searches

Supplier

AUCKLAND UNIVERSITY OF

CANADIAN BROADCASTING CORPORATION

BRIGHT CAN-ACHIEVE LIMITED

W B MASON CO INC

MEALOR PAUL

See More

Show More

Requisition Status

Completed

Pending

Withdrawn

Show More

Prepared For

Pickering, Kristen

Hess, Maggie

Gabriel-Perez, Brandon

Gagnon, Shawn

Gonzalez, William

Show More

Prepared By

Pickering, Kristen

Hess, Maggie

Gabriel-Perez, Brandon

Submitted Date: Last 90 days ▾

Department: PROCUREMENT ▾

Page 1 of 2

Requisition Number ▾

3787129

3774463

3707525

3765483

3764313

3764323

3764288

MEALOR PAUL

2023-04-28 702672155 06

Pending

WENDYKENNEDY.COM INC

2023-04-28 702672155 05

Pending

3760314

CANADIAN BROADCASTING CORPORATION

TEST-WIRE WORKFLOW-CBC Radio Canada Lease Payment Clem

Pending

3760309

AUCKLAND UNIVERSITY OF

TEST-WIRE WORKFLOW-2023-04-26 702672155 01

Pending

3760346

MEALOR PAUL

TEST-WIRE WORKFLOW-Commission fee for composition work 06.27.22

Pending

Save As

Pin Filters

Export All

20 Per Page ▾

Status	Prepared For	Submitted Date	Total Amount
	Maggie Hess	6/2/2023 1:14:50 PM	4,900.00 USD
	Kristen Pickering	5/23/2023 5:05:17 PM	214.15 USD
	William Gonzalez	5/23/2023 10:10:18 AM	50.00 USD
	Brandon Gabriel-Perez	5/3/2023 3:18:23 PM	0.00 USD
	Brandon Gabriel-Perez	5/1/2023 10:57:19 AM	2,600.00 USD
	Maggie Hess	4/28/2023 1:27:40 PM	30.00 USD
	Maggie Hess	4/28/2023 1:26:07 PM	50.00 USD
		4/28/2023 1:25:00 PM	40.00 USD
		4/28/2023 1:23:04 PM	20.00 USD
		4/28/2023 1:20:20 PM	10.00 USD
		4/26/2023 10:28:47 AM	7,000.00 USD
	Maggie Hess	4/26/2023 10:15:52 AM	7,060.00 USD
	Maggie Hess	4/26/2023 9:43:00 AM	5,500.00 USD
	Maggie Hess	4/26/2023 9:31:20 AM	6,100.00 USD

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- 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**.

UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

Orders

Search

Requisitions

Search Requisitions

Quick Filters

My Searches

Supplier

W B MASON CO INC

PHILIP ROSENAU COMPANY INC

AUCKLAND UNIVERSITY OF

CANADIAN BROADCASTING CORPORATION

BRIGHT CAN-ACHIEVE LIMITED

See More

Show More

Requisition Status

Completed

Pending

Withdrawn

See More

Show More

Department

PROCUREMENT SERVICES (04750)

IT-ENTRPRS SYSTMS & CLOUD SVCS (04375)

IT-INFORMATION TECHNOLOGIES (04324)

BIOMEDICAL ENGR DEPARTMENT (03170)

ENGLISH LANGUAGE INSTITUTE (01470)

See More

Show More

Prepared For

Romeo, Lauren

Pickering, Kristen

Submitted Date: Last 90 days

Quick search

Add Filter

Clear All Filters

Page 1 of 3

1-20 of 51 Results

Requisition Number	Supplier	Requisition Name	Requisition Status	Prepared For	Submitted Date	
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3783255	BURNING GLASS INTERNATIONAL	Testing 42969 K	Completed	Lauren Romeo	6/2/2023 8:30 AM	
3783950	FASTENAL COMPANY	Keck Fastenal 053023	Pending	Yong Zhao	5/30/2023 3:26:47 PM	0.00 USD
3780670	BPG HOTEL PARTNERS IV LLC	Testing 42969 h	Completed	Lauren Romeo	5/24/2023 2:52:25 PM	250.00 USD
3780635	APPLE COMPUTER INC	Testing 42969 g	Completed	Lauren Romeo	5/24/2023 2:30:49 PM	1,250.00 USD
3780631	APPLE COMPUTER INC	TEST 42969 a	Completed	Lauren Romeo	5/24/2023 2:00:13 PM	1,500.00 USD
3774463	LOWE'S HOME CENTERS INC	test for case 03022423	Pending	Kristen Pickering	5/23/2023 5:05:17 PM	214.15 USD
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3765483	CASSIDY PAINTING	Cassidy Powerwashing	Withdrawn	Brandon Gabriel-Perez	5/3/2023 3:18:23 PM	0.00 USD

Export All

Export Selected Rows

Show Printable Results

Manage Search Exports

Manage Scheduled Exports

Manage Export Templates

Success

Successfully created the export request. You can view the status and retrieve the file at

Manage Search Exports

To retrieve your file, select **Manage Search Exports** from the **Export All** menu or from the **link** in the **Success** message.

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Manage Exports

- Export Requests
- Export Schedules
- Export Templates

Click to Filter

Refresh this Page

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
<a href="#">Export request for Requisition</a>	Completed	Requisition	Transaction Export (CSV)	6/4/2023 2:31:29 PM	6/4/2023 2:31:34 PM	6/11/2023	Total Records: 27	Delete

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](mailto:procurement@udel.edu)

## Resources:

- [Procurement Services Website](#)
- [Enhanced Search](#)
- [Finding Users and User Information in UD Exchange](#)

