KUALI

Document Search

Presented by Campus Services
Campus Services, a financial customer services unit within Business and Financial Services, partners with the campus community by providing professional, knowledgeable and responsible business and financial solutions.
Campus Services

Website:
http://busfin.colostate.edu/cs.aspx
Log in to KFS – Training Environment

**Welcome to the Campus Administrative Portal (CAP) web page.**

CAP is designed as an entry page to the administrative applications supported by the Information Systems Department. The initial implementation of CAP is to support single sign-on for the Oracle HR application including self-service, but other administrative applications will be added as work on CAP continues.

All available applications are accessed using the region on the right side of the page. The “QuickApplications” provide single sign-on access. The “Links” require a second sign-on using your current application username and password. The categories at the top of the page are to provide access to additional resources.

The “Help Request or Feedback” link can be used to communicate questions, suggestions or issues regarding the administrative applications supported by Information Systems in addition to any general Information Systems related questions, suggestions or issues.

Please use the “Help Request or Feedback” link to provide feedback regarding the CAP web pages. You can also send email to is_help_admin@mail.colostate.edu. We welcome your comments.

To access the CAP web page from off campus, please use the URL https://secure.colostate.edu and select the CAP menu item.

To create CAP as a Favorite (Bookmark) for access from on campus, use this page instead of the sign on page. From off campus you should bookmark https://secure.colostate.edu

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If you are a CSU employee and are ill with what you believe to be Influenza, please log into the “Self-report your flu illness” application under Resources on the right to report it. To view associated flu reports, you can use the “View self-reported flu statistics” application under Resources on the right.
Overview

- Document Search Overview
- Searches:
  - Disbursement Voucher
  - Payment Request
  - Purchase Order
  - Receiving
  - Requisition
  - Detailed and Super User
Document Search Overview
Document Search Screen

Allows a person to search on the following criteria:

- Document Type – IB, IO, CR, ACCT etc.
- User ID of document initiator (creator)
- Document ID – Document Number
- Date of Document Creation
Document Search Screen

Allows you to save a search for future use:

• To save a search enter a name into the Name this Search field.
• To use the search again pick the search name from the list of named searches at the top of the Document Search screen
• To clear saved searches just click Clear Saved Searches. Beware this will clear all your saved searches.
You can use wildcards to broaden your search:

- The Wildcard * can be used
- Cannot be used in numeric fields such as dates and document numbers
- Maximum number of results is 500
Document Type Searches

[Image of a screenshot of the Kuali financial systems interface for document type searches, with fields for Type, Initiator, Document/Notification ID, Date Created From, Date Created To, and Name this search (optional).]
Document Type Searches

The most Common Document Type Codes:

- Account (ACCT)
- Adjustment Voucher (AV)
- Advance Deposit (AD)
- Budget Adjustment (BA)
- Cash Receipts (CR)
- Disbursement Voucher (DV)
- Distribution of Income/Expense (DI)
- General Error Correction (GEC)
- Internal Billing (IB)
- Internal Order (IO)
- Payment Request (PREQ)
- Pre-Encumbrance (PE)
- Purchase Order (PO)
- Transfer of Funds (TF)
- Work Order Authorizations (WOA)
Notice the screen changes.
Document Search Screen

Only 500 Results
Document Search Screen

All ACCT documents containing 5355050 for last 12 months

Narrow Search by using account number or changing date fields
Document Search Screen

Document Specific Searches gives you Doc. ID, Doc Description, Org Doc Number if Used, Account Number and a Route Log Option.
Document Search Screen

To save your search for future use just put a name in the Name this Search Field.

```plaintext
<table>
<thead>
<tr>
<th>Document/Notification Id</th>
<th>Document Description</th>
<th>Organization Document Number</th>
<th>Chart Code</th>
<th>Account Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>1452553</td>
<td>4-H National Mentoring Program</td>
<td></td>
<td>CO</td>
<td>5355050</td>
</tr>
</tbody>
</table>
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Initiator (EID) Search

Enter the Person’s EID who created the document and press Search.
Initiator (EID) Search

To look up a Person’s EID click on the to search for a person.
Initiator (EID) Search

Enter the persons last name and click search.
Initiator (EID) Search

Click on return value next to the persons name.
Initiator (EID) Search

If too many results are found use Dates and Doc Type to narrow your search.
Initiator (EID) Search

If using date to narrow search, screen fields do not change.
Initiator (EID) Search

If using doc type to narrow search, screen fields do change.

New Fields
Document/Notification Search

The easiest and fastest way to a document. Each document has its own unique number.
Document/Notification Search
Just enter the document number and click search.

Just enter doc number and click search
Date of Document Search
Allows you to search by a date range.

Search Day, Week, Month, Quarter or Year
Date of Document Search

Date Range searches are more useful when used with other search fields.

Too many Results
Date of Document Search

One day of production produces too many results.

Too many results

Only one day of documents
Disbursement Voucher
Custom Document Searches
Disbursement Vouchers
Custom Document Searches
Disbursement Vouchers
An employee has recently left CSU, but you need to find the details of a past trip to Akron, CO to update your records. You do not know who initiated the document, or when the event occurred, but you do know the employee’s last name is “Barclay,” and that should appear in the document description. What is the best way to find this document?
Custom Document Searches

Disbursement Vouchers – Example 2

One of your employees is planning to attend the annual NODA conference. In order to see if you have enough funds available to cover the cost of the registration for the conference, you want to the registration cost in a prior year. You don’t know the exact date that the conference previously occurred, but you do know that it was in FY 2012, and you know that it hit account “2702000.”

How would you find this document?
Payment Request
Custom Document Searches

Payments Requests
Custom Document Searches
Payments Requests
Custom Document Searches

Payments Requests – Example 3

You recently purchased some equipment from Dell Marketing Corp, and you want to make sure the Payment Request has been finalized. All you know is that the purchase order number is 312673.

How would you find this Payment Request?
Custom Document Searches
Payments Requests – Example 4

You are trying to find a Payment Request that you know was initiated during the period of 2/3/12 and 2/13/12, and was for the Vendor “Apple Computer Inc.” How would you find this document?
Purchase Order
Custom Document Searches

Purchase Orders
Custom Document Searches

Purchase Orders
You have been asked to find a purchase order for your organization (8031), and it was in the amount of $1,500. The person doesn’t know when the Purchase Order was done, but only knows that the amount was $1,500. How would you find this document?
Custom Document Searches
Purchase Orders – Example 6

You are looking for a Void purchase order that was for Sterling Crane Service on August 29th, but you do not know the actual day the document was created or voided. How would you find this document?
Custom Document Searches
Receiving
Custom Document Searches
Receiving
Custom Document Searches

Receiving – Example 7

You are searching for a Receiving document that was initiated by “kkita” and is for TKW LLC.

How would you find this document?
You are searching for a document with the organization document number “slice.” You know that the Receiving document was for a Power Cord adapter for a Dell Latitude Laptop, and that it was received sometime between 2/1/12 and 2/14/12.

How would you find this document?
Requisition
Custom Document Searches

Requisitions
Custom Document Searches

Requisitions

![Image of Kuali financial systems webpage with various fields for document searches, including Type, Initiator, Document/Notification ID, Date Created From, Date Created To, Document Description, Organization Document Number, Requisition #, Vendor #, Requisition Chart Code, Requisition Organization Code, Requestor Name, Delivery Campus, Delivery To, Reference 1, Reference 2, Reference 3, Requisition Status, Chart Code, Account Number, Organization Code, Ledger Document Type, Total Amount, Search Result Type, and Name this search (optional).]
Custom Document Searches
Requisitions – Example 9

You are searching for a Requisition in which Janine L. Crick was the requestor, and it was for $252.00.

How would you find this document?
A delivery was made to the Housing Warehouse for cleaning supplies with the requisition number 216114.

How would you find this document?
Detailed and Super User Searches
Detailed/ Super User Searches

Super User Searches Expand the Doc Type
Search options to include:

- Approver
- Application Doc Id – Same as Org Doc #
- Date Modified – To/From Fields
- Date Finalized – To/From Fields
- Viewer – See what other departments viewed
- Status – Pending or Completed
- Date Approved – To/From Fields.
- Title – Document Type and Description
Questions

Contact your Campus Service Representative with Kuali questions

Erin Mercurio  491–6752
David Leathers  491–5509
Grant Polzer  491–4148
Summer Leaming  491–2801