Colorado State University

KUALI DOCUMENT SEARCH INCLUDING WILD CARD FEATURES

Presented by Campus Services

Campus Services

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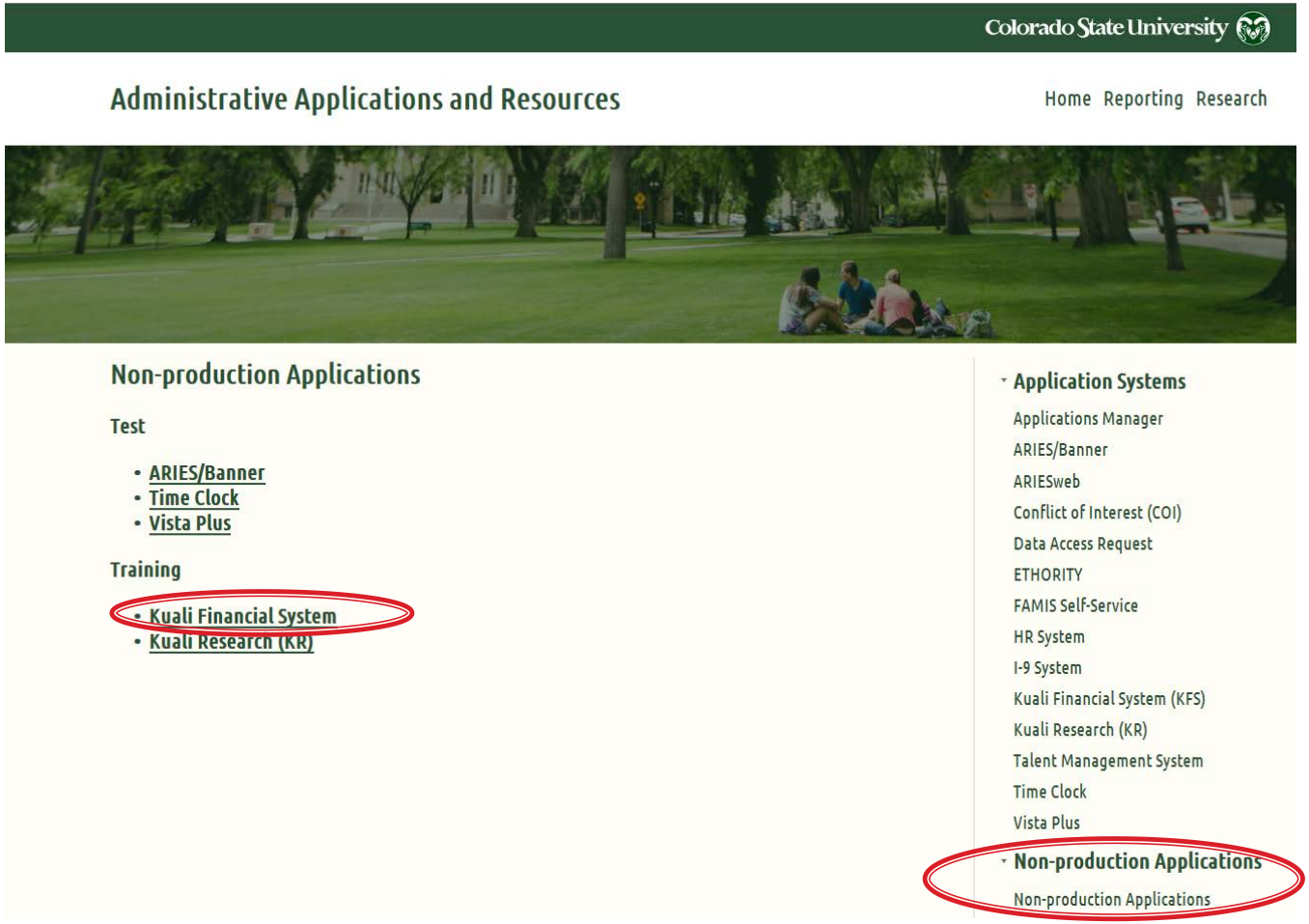
Website: http://busfin.colostate.edu/Depts/Campus_Svcs.aspx

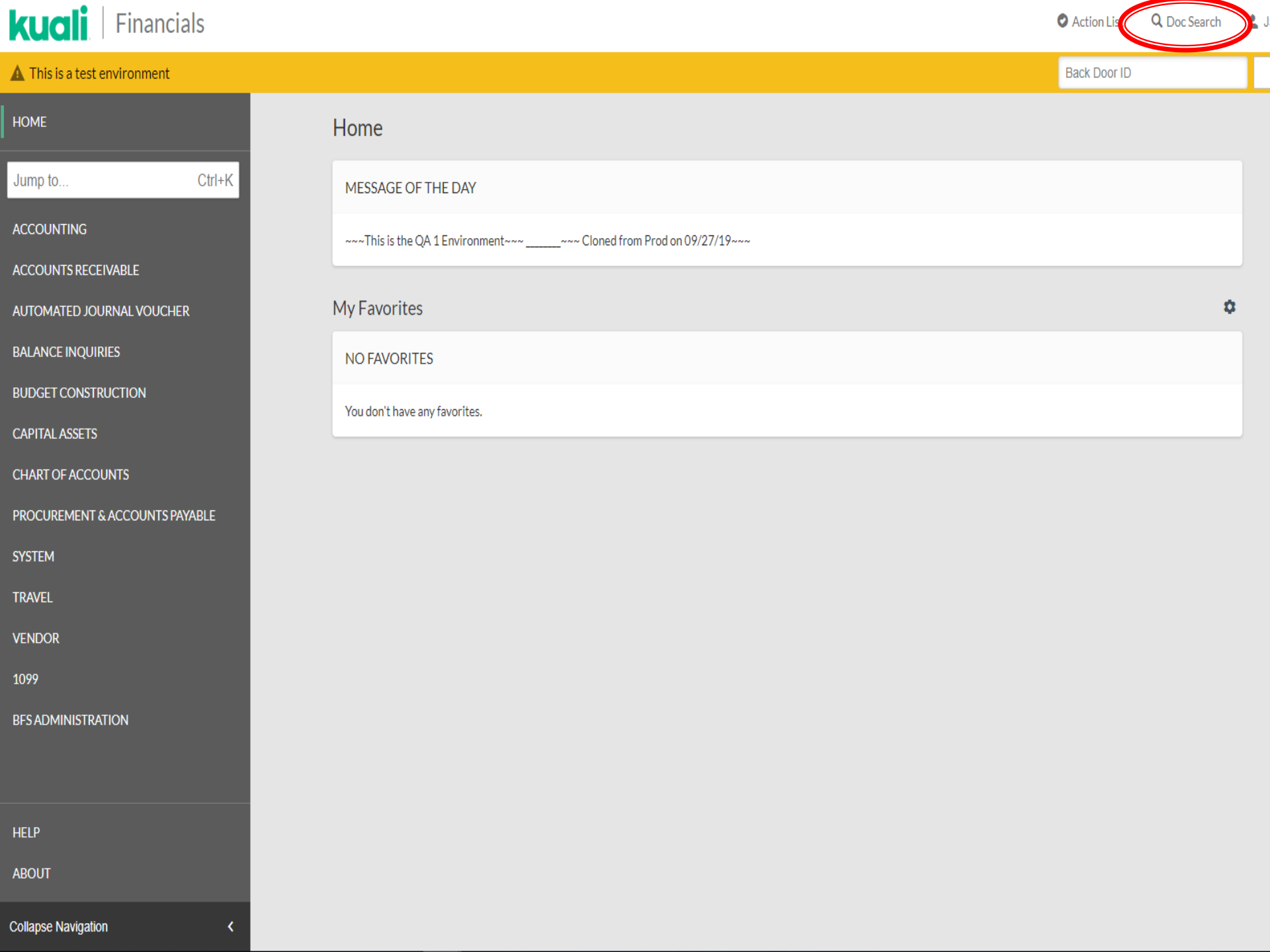
Log in to KFS – Training Environment



Overview:

- Document Search Overview
- Searches:
  - Disbursement Voucher
  - Payment Request
  - Purchase Order
  - Receiving
  - Requisition
- Detailed Search and Superuser Search
- Wild Card Searches

Document Search Overview


kuali
Financials
Action Lis
Doc Search
J
This is a test environment
Back Door ID
HOME
Jump to... Ctrl+K
ACCOUNTING
ACCOUNTS RECEIVABLE
AUTOMATED JOURNAL VOUCHER
BALANCE INQUIRIES
BUDGET CONSTRUCTION
CAPITAL ASSETS
CHART OF ACCOUNTS
PROCUREMENT & ACCOUNTS PAYABLE
SYSTEM
TRAVEL
VENDOR
1099
BFS ADMINISTRATION
HELP
ABOUT
Collapse Navigation
Home
MESSAGE OF THE DAY
~~~This is the QA 1 Environment~~~ _____~~~ Cloned from Prod on 09/27/19~~~
My Favorites
NO FAVORITES
You don't have any favorites.
~~~

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.

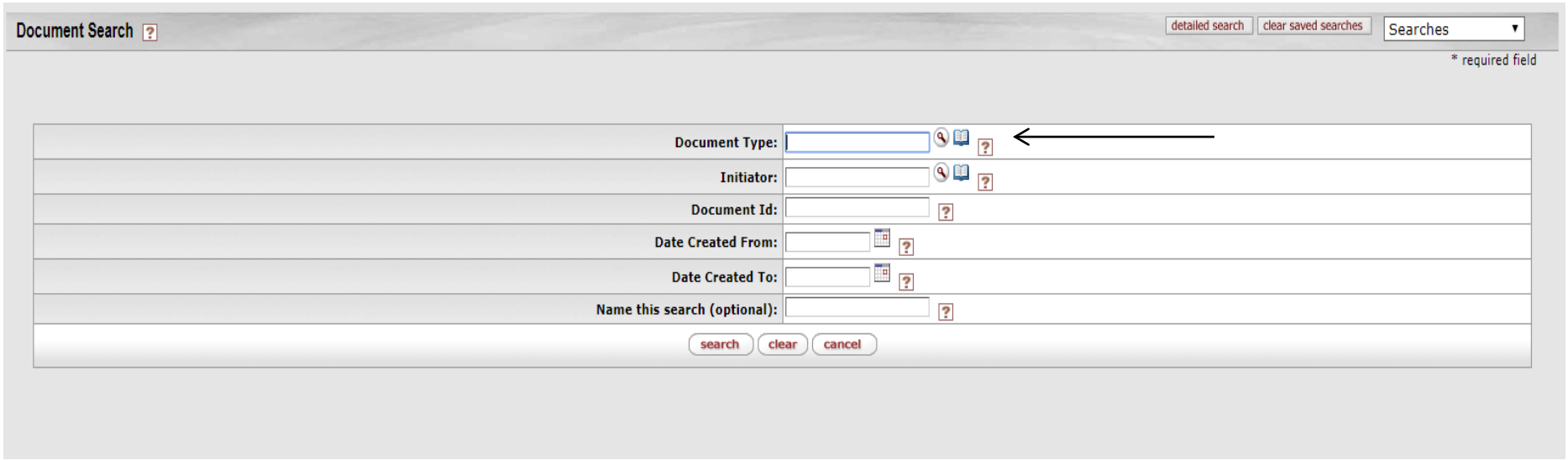
Document Search Screen

You can use wildcards to broaden your search:

- The Wildcard * can be used – covered towards the end of the slide.
- Cannot be used in numeric fields such as dates and document numbers
- Maximum number of results is 500

Document Type Searches

Colorado State University



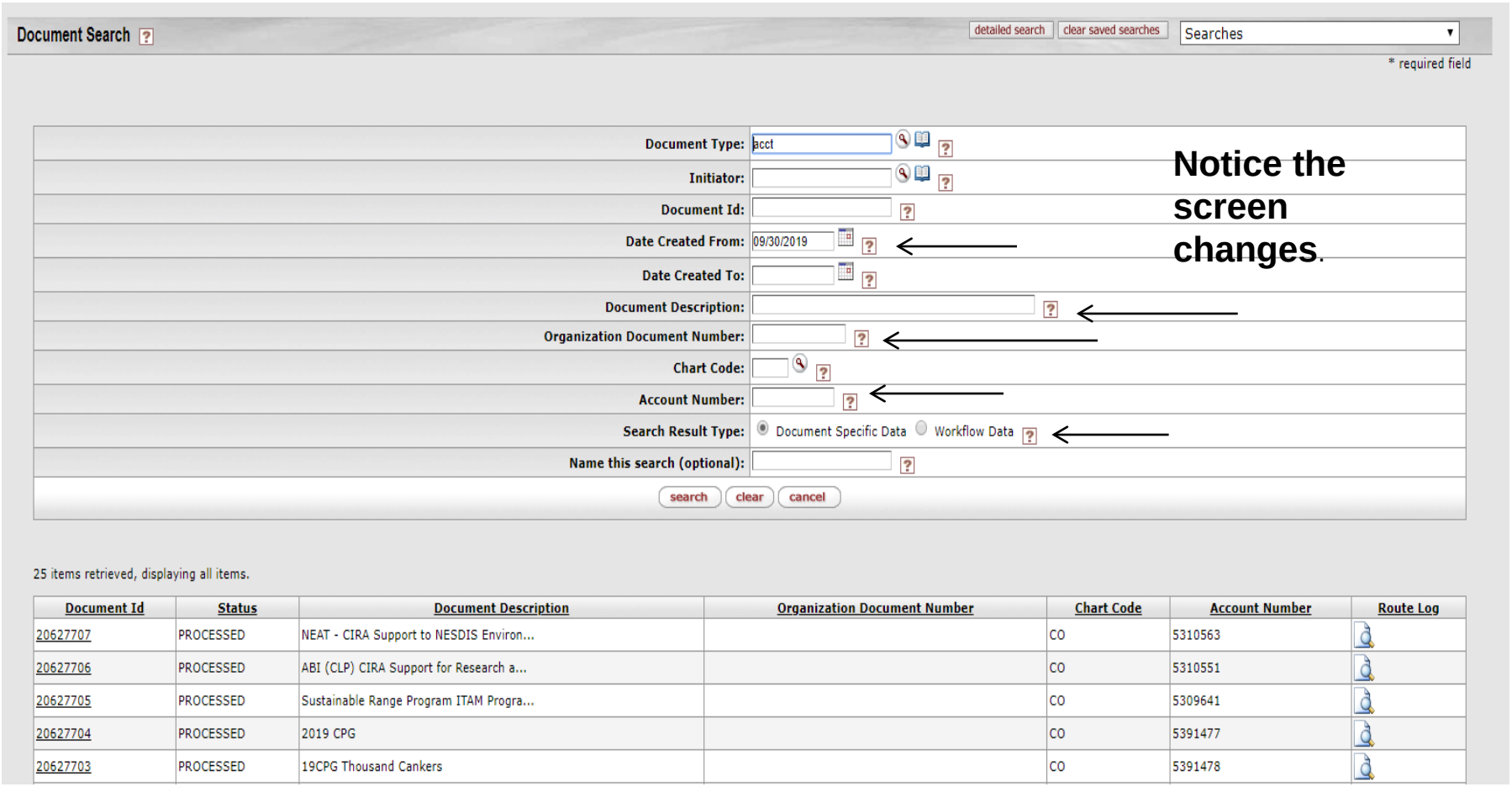
Document Type Searches

Colorado State University

The most Common Document Type Codes:

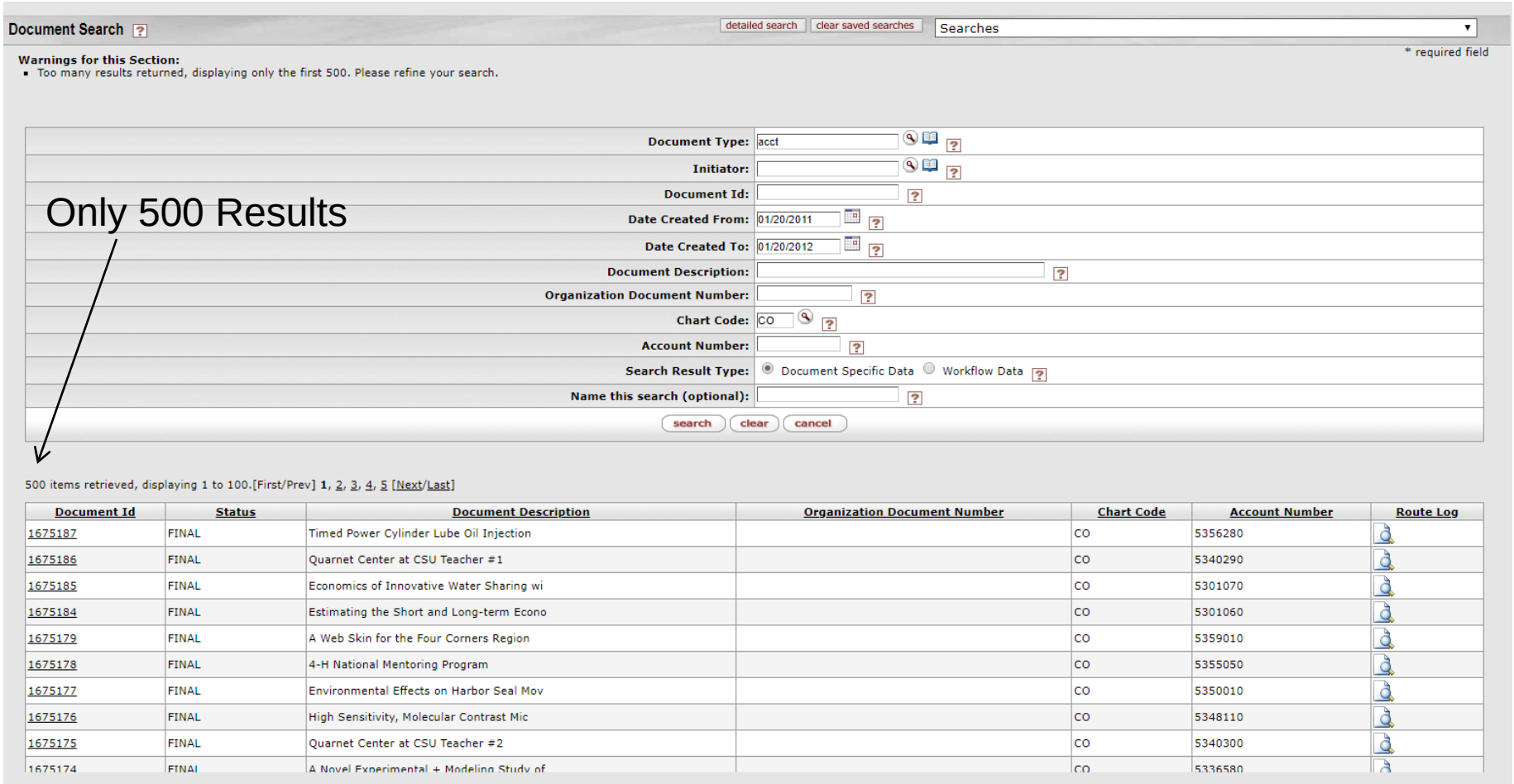
- Account (ACCT)
- Adjustment Voucher (AV)
- Advance Deposit (AD)
- Budget Adjustment (BA)
- Cash Receipts (CR)
- Disbursement Voucher (DV)
- Distribution of Income/Expense (DI)
- General Error Correction (GEC)
- Internal Billing (IB)
- Internal Order (IO)
- Payment Request (PREQ)
- Pre-Encumbrance (PE)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

Document Search Screen



Document Search Screen

Colorado State University



Document Search

detailed search | clear saved searches | Searches

* required field

Warnings for this Section:
- Too many results returned, displaying only the first 500. Please refine your search.

Only 500 Results

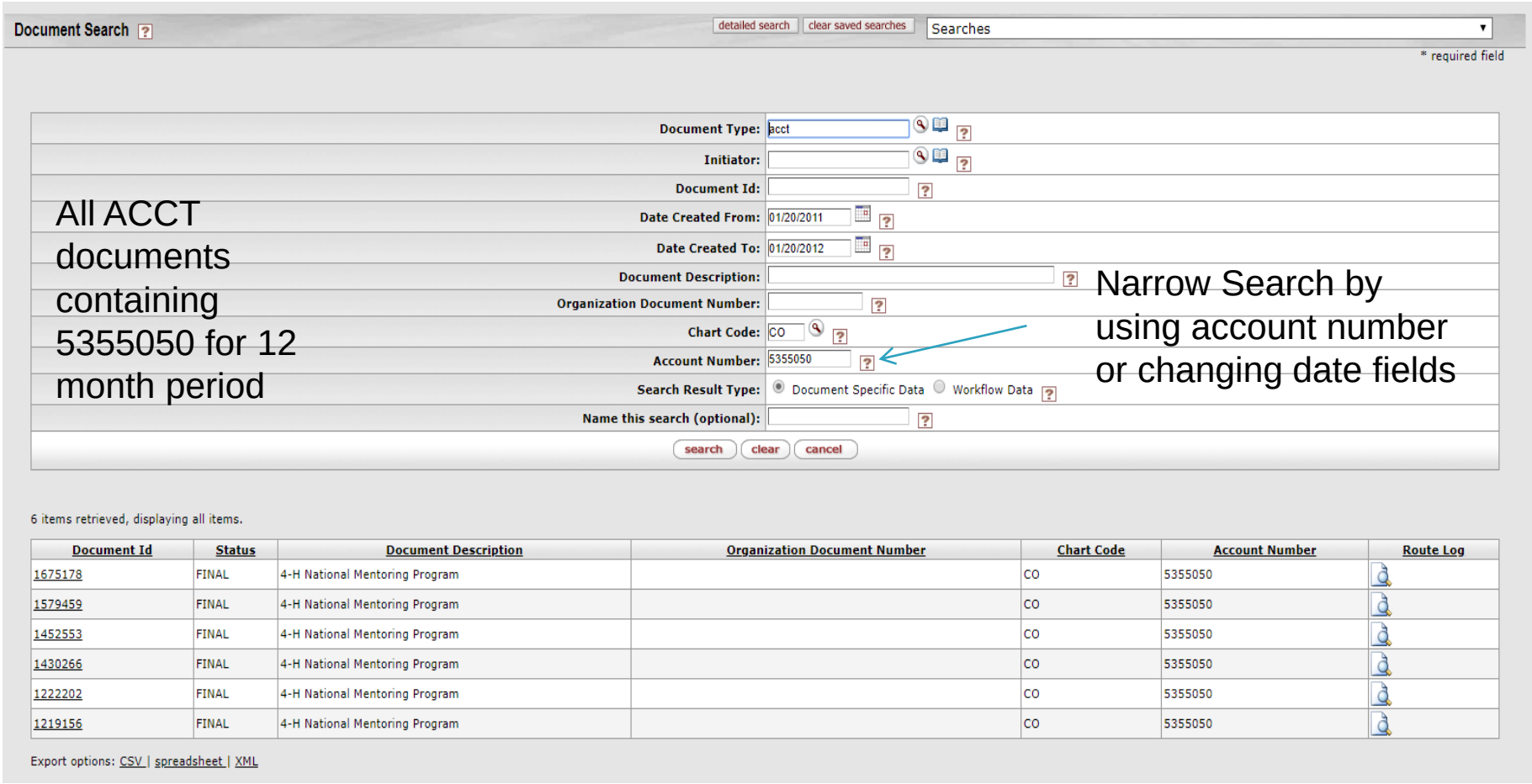
Document Type:	acct
Initiator:	
Document Id:	
Date Created From:	01/20/2011
Date Created To:	01/20/2012
Document Description:	
Organization Document Number:	
Chart Code:	CO
Account Number:	
Search Result Type:	Document Specific Data / Workflow Data
Name this search (optional):	

search | clear | cancel

500 items retrieved, displaying 1 to 100.[First/Prev] **1**, 2, 3, 4, 5 [Next/Last]

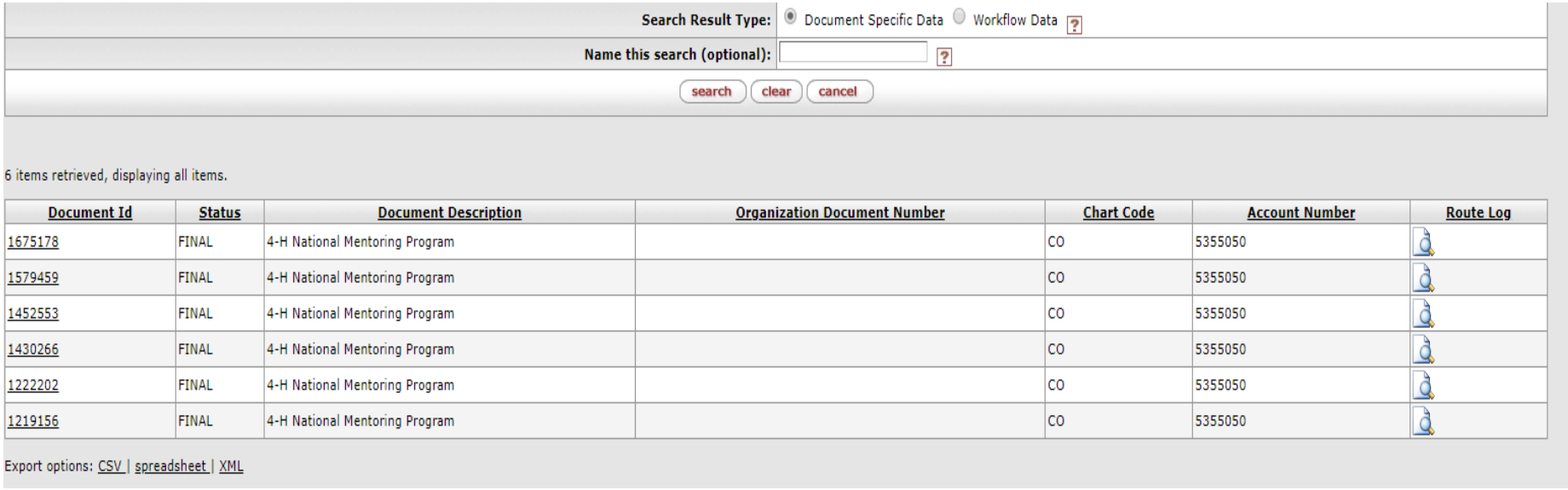
Document Id	Status	Document Description	Organization Document Number	Chart Code	Account Number	Route Log
1675187	FINAL	Timed Power Cylinder Lube Oil Injection		CO	5356280	
1675186	FINAL	Quarnet Center at CSU Teacher #1		CO	5340290	
1675185	FINAL	Economics of Innovative Water Sharing wi		CO	5301070	
1675184	FINAL	Estimating the Short and Long-term Econo		CO	5301060	
1675179	FINAL	A Web Skin for the Four Corners Region		CO	5359010	
1675178	FINAL	4-H National Mentoring Program		CO	5355050	
1675177	FINAL	Environmental Effects on Harbor Seal Mov		CO	5350010	
1675176	FINAL	High Sensitivity, Molecular Contrast Mic		CO	5348110	
1675175	FINAL	Quarnet Center at CSU Teacher #2		CO	5340300	
1675174	FINAL	A Novel Experimental + Modeling Study of		CO	5336580	

Document Search Screen



Document Search Screen

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



Search Result Type: Document Specific Data / Workflow Data

Name this search (optional):

search | clear | cancel

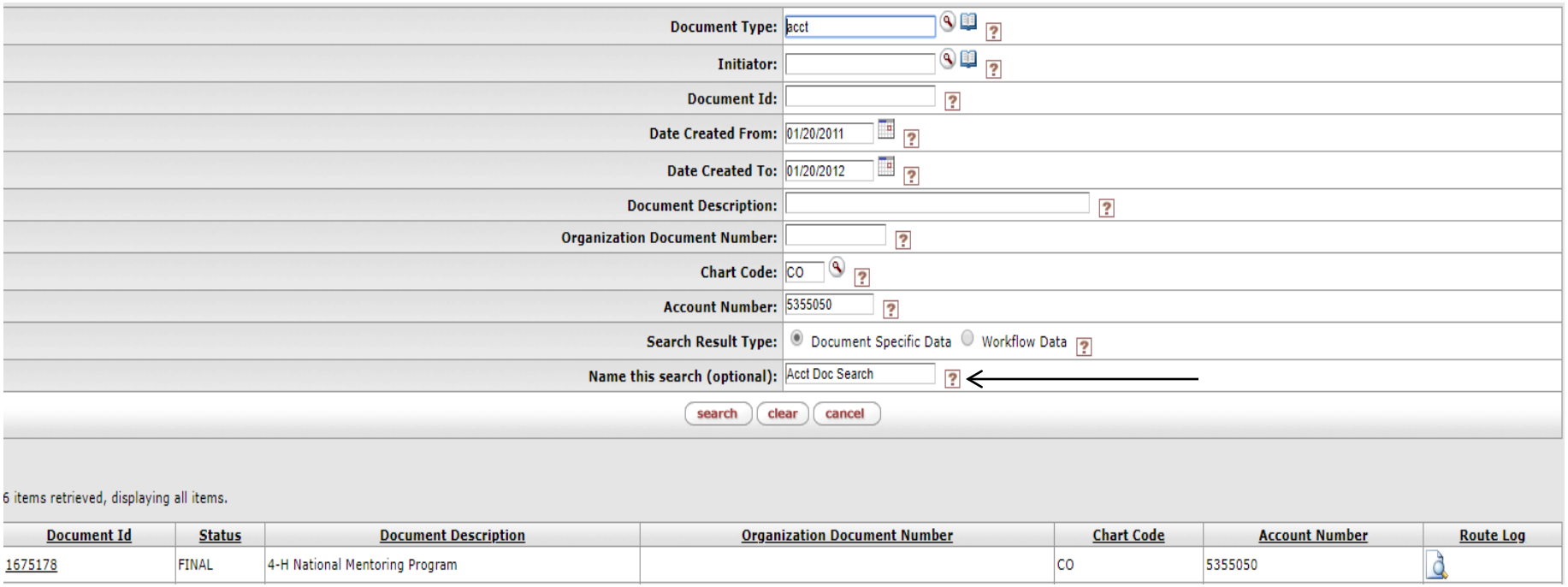
6 items retrieved, displaying all items.

Document Id	Status	Document Description	Organization Document Number	Chart Code	Account Number	Route Log
1675178	FINAL	4-H National Mentoring Program		CO	5355050	
1579459	FINAL	4-H National Mentoring Program		CO	5355050	
1452553	FINAL	4-H National Mentoring Program		CO	5355050	
1430266	FINAL	4-H National Mentoring Program		CO	5355050	
1222202	FINAL	4-H National Mentoring Program		CO	5355050	
1219156	FINAL	4-H National Mentoring Program		CO	5355050	

Export options: CSV | spreadsheet | XML

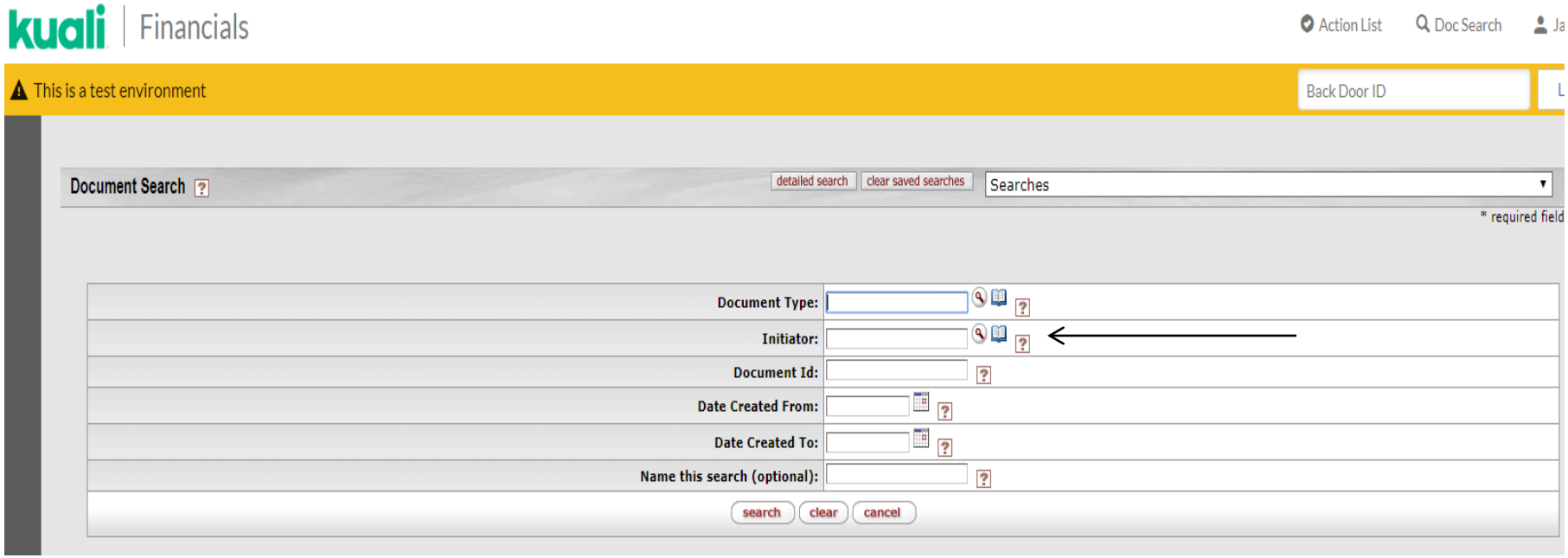
Document Search Screen

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



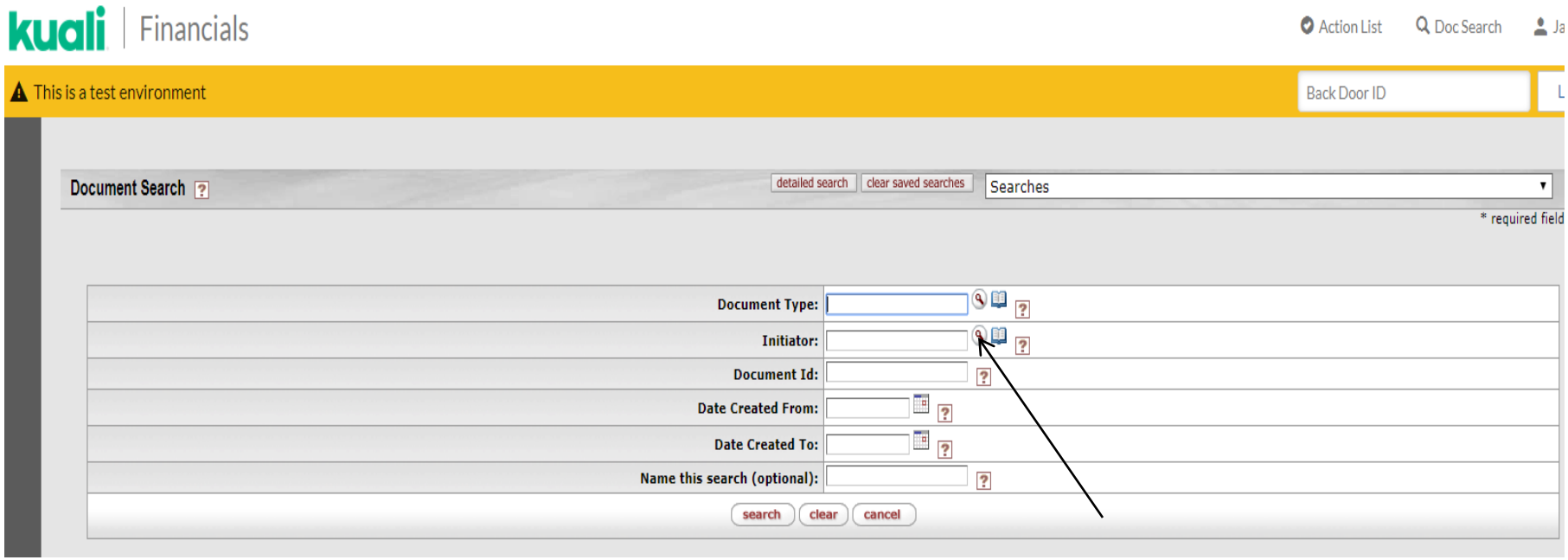
Initiator (EID) Search

Enter the Person's EID who created the document and press Search.



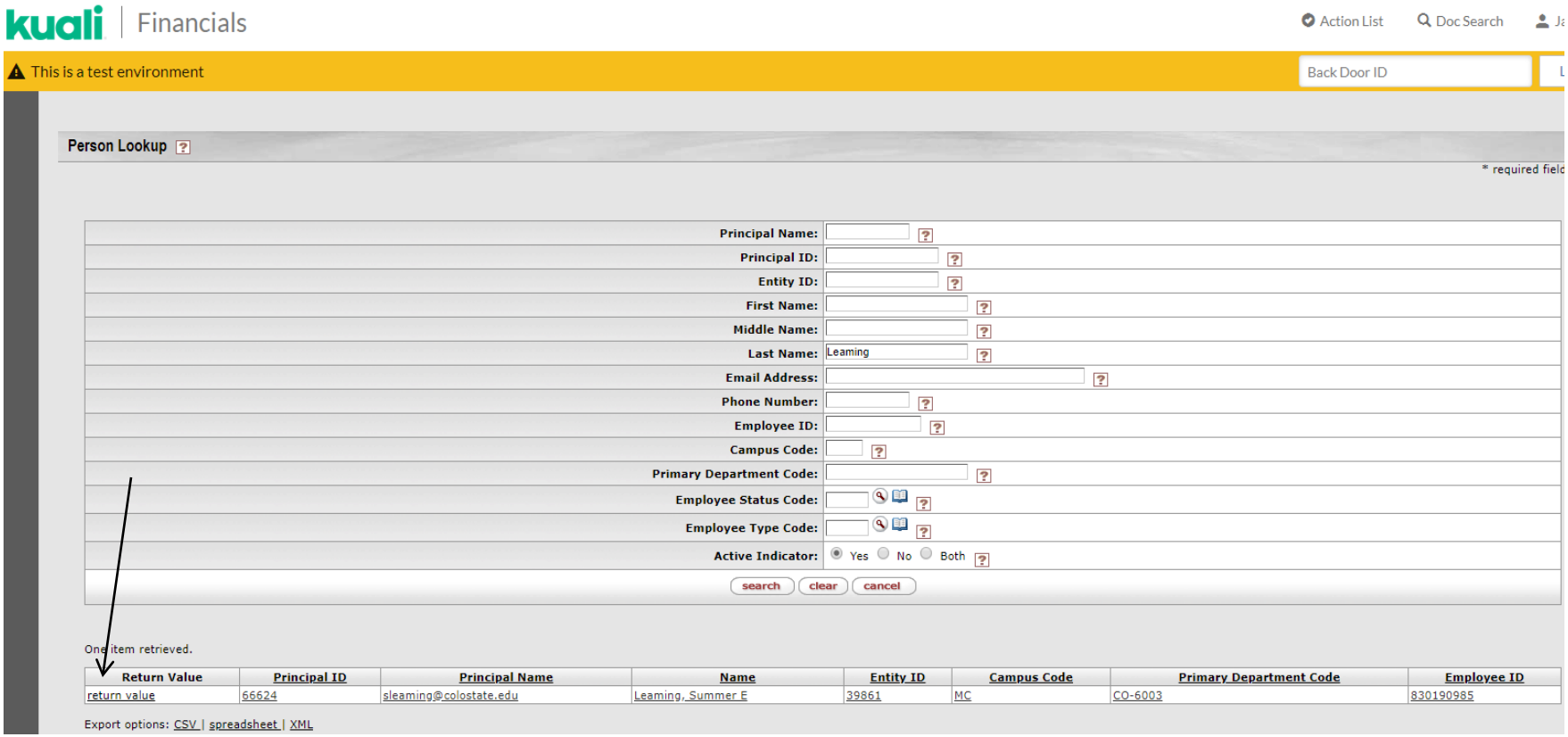
Initiator (EID) Search

To look up a Person's EID click on the to search for a person.



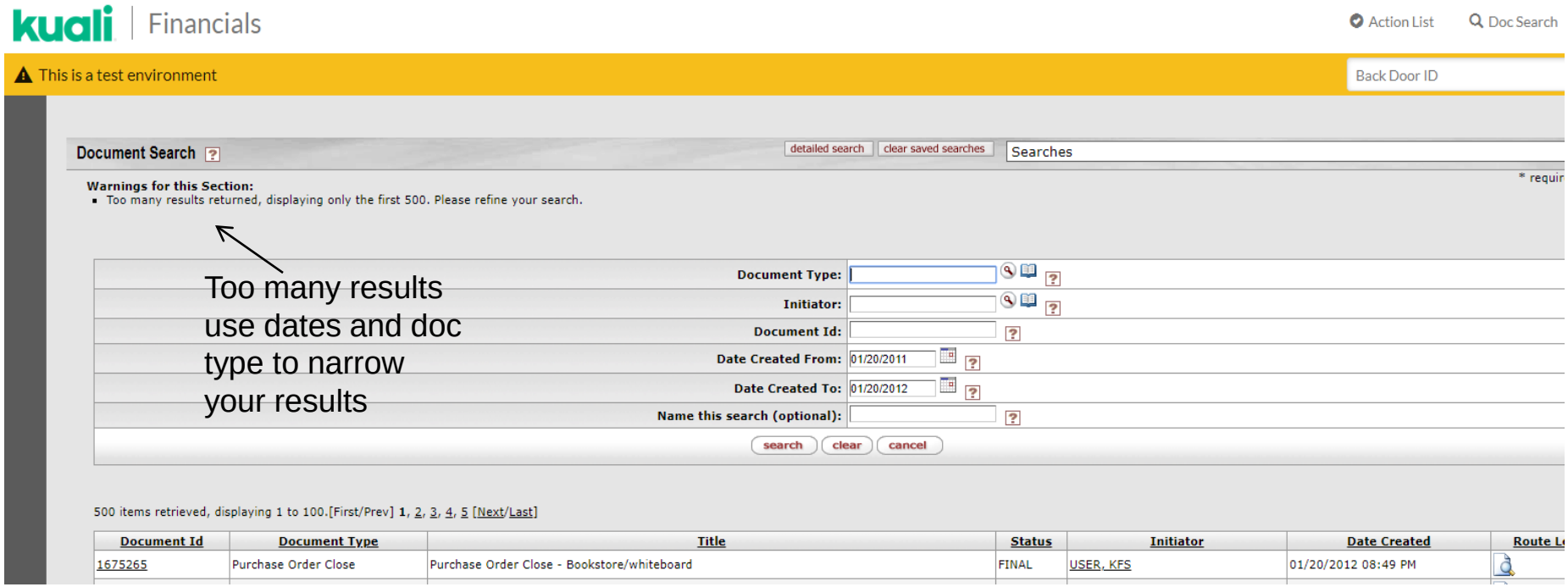
Initiator (EID) Search

Click on return value next to the persons name.



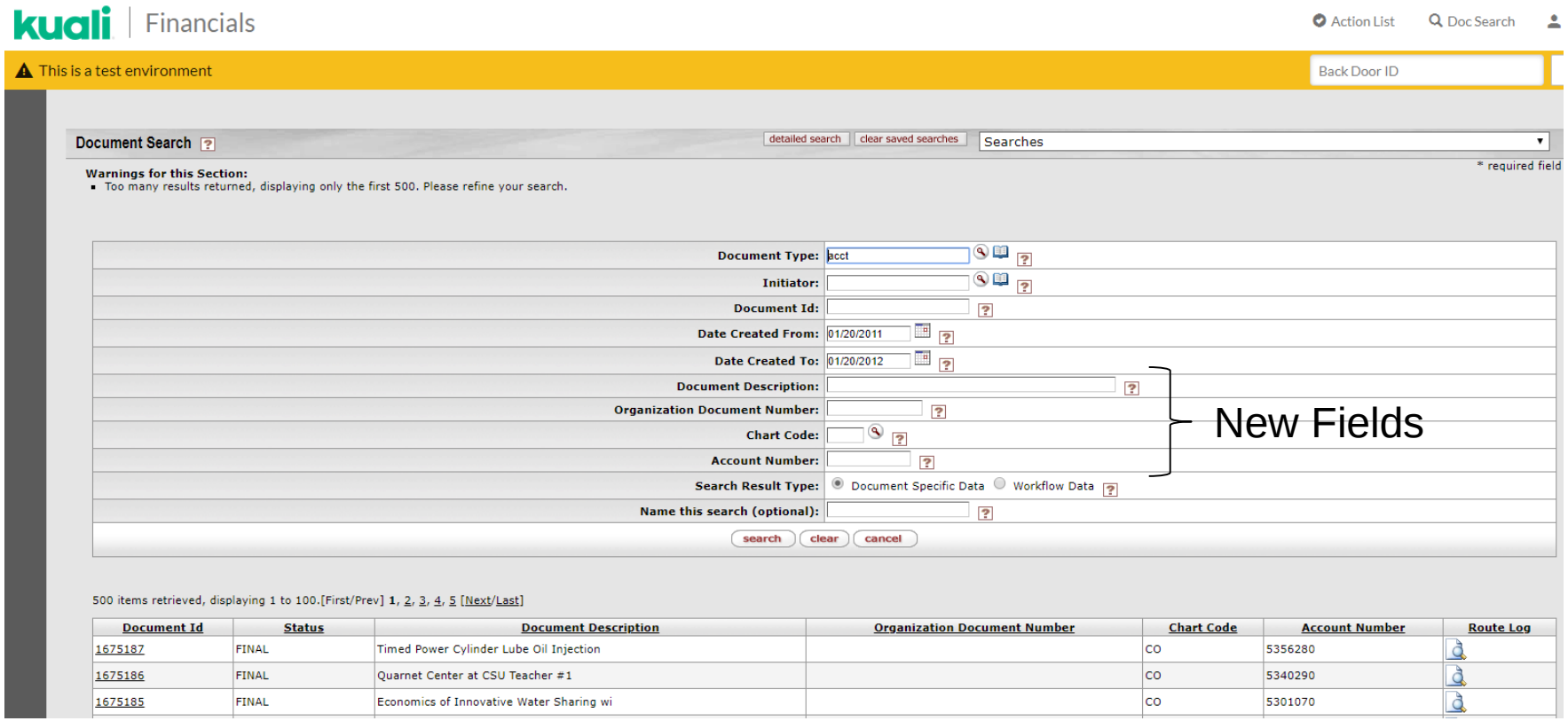
Initiator (EID) Search

If too many results are found use Dates and Doc Type to narrow your search.



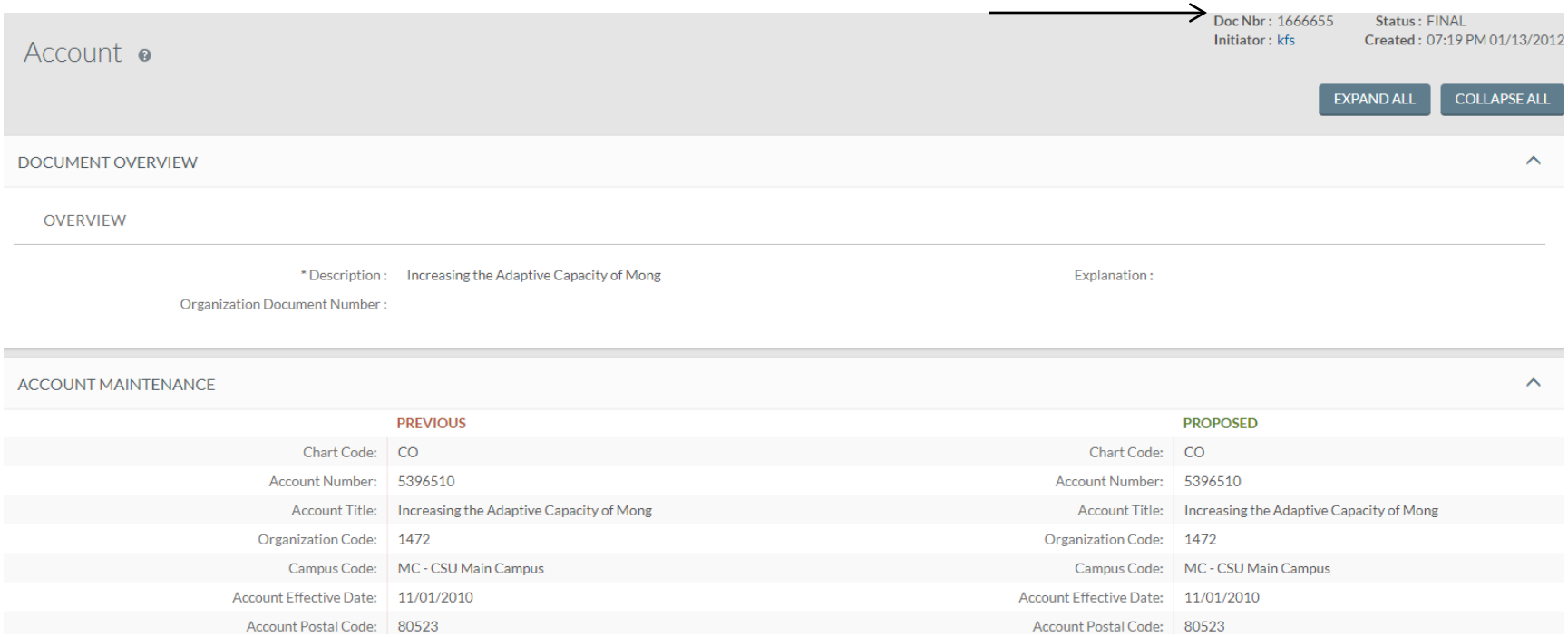
Initiator (EID) Search

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



Document/Notification Search

The easiest and fastest way to a document.
Each document has it's own unique number.



Account

Doc Nbr : 1666655 Status : FINAL
Initiator : kfs Created : 07:19 PM 01/13/2012

EXPAND ALL COLLAPSE ALL

DOCUMENT OVERVIEW

OVERVIEW

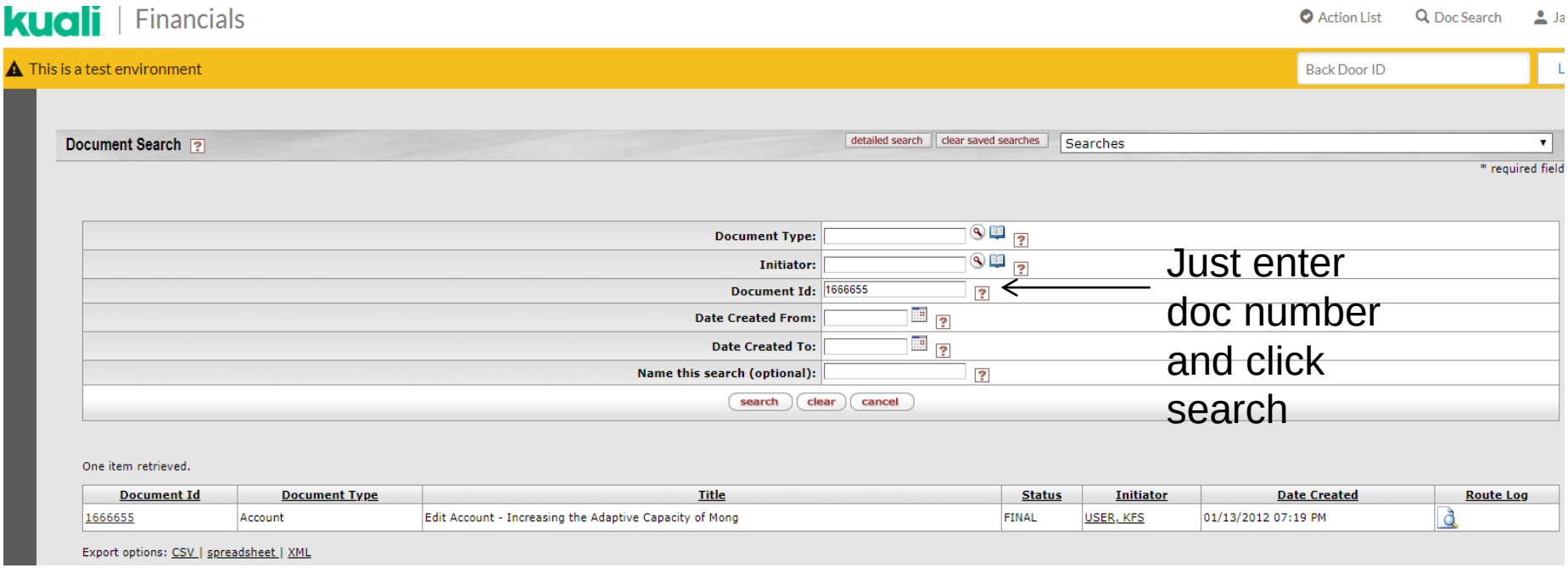
* Description : Increasing the Adaptive Capacity of Mong
Organization Document Number :
Explanation :

ACCOUNT MAINTENANCE

	PREVIOUS		PROPOSED
Chart Code:	CO	Chart Code:	CO
Account Number:	5396510	Account Number:	5396510
Account Title:	Increasing the Adaptive Capacity of Mong	Account Title:	Increasing the Adaptive Capacity of Mong
Organization Code:	1472	Organization Code:	1472
Campus Code:	MC - CSU Main Campus	Campus Code:	MC - CSU Main Campus
Account Effective Date:	11/01/2010	Account Effective Date:	11/01/2010
Account Postal Code:	80523	Account Postal Code:	80523

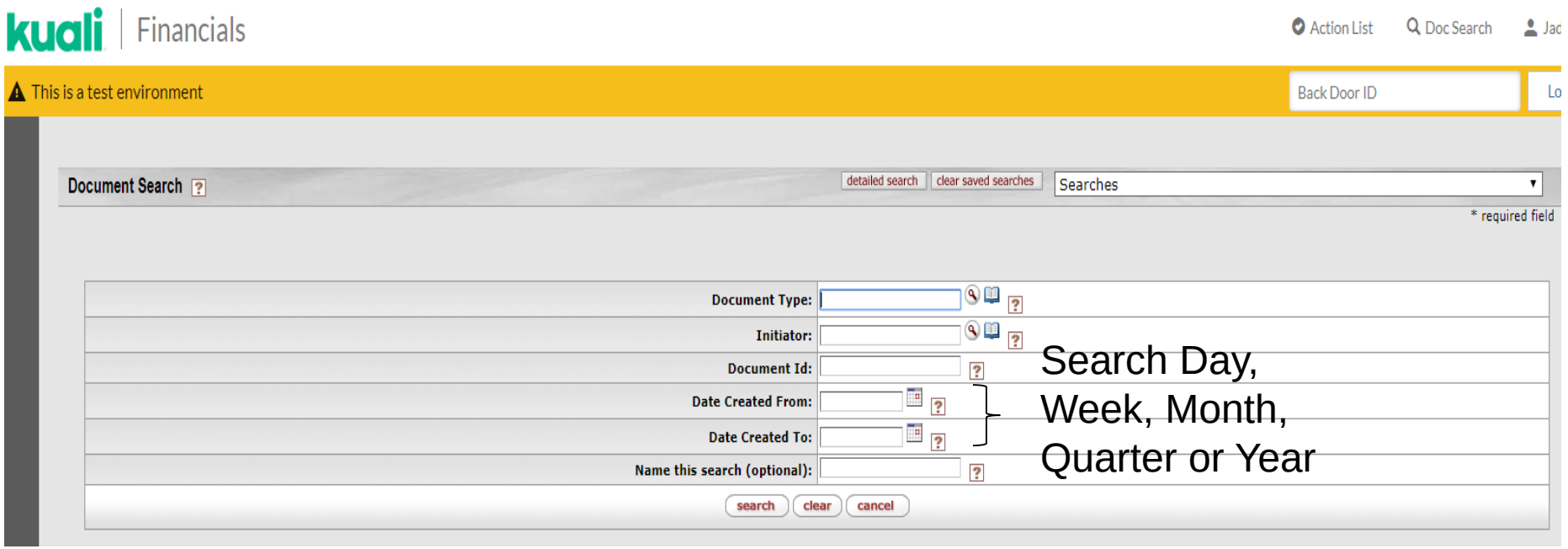
Document/Notification Search

Just enter the document number and click search.



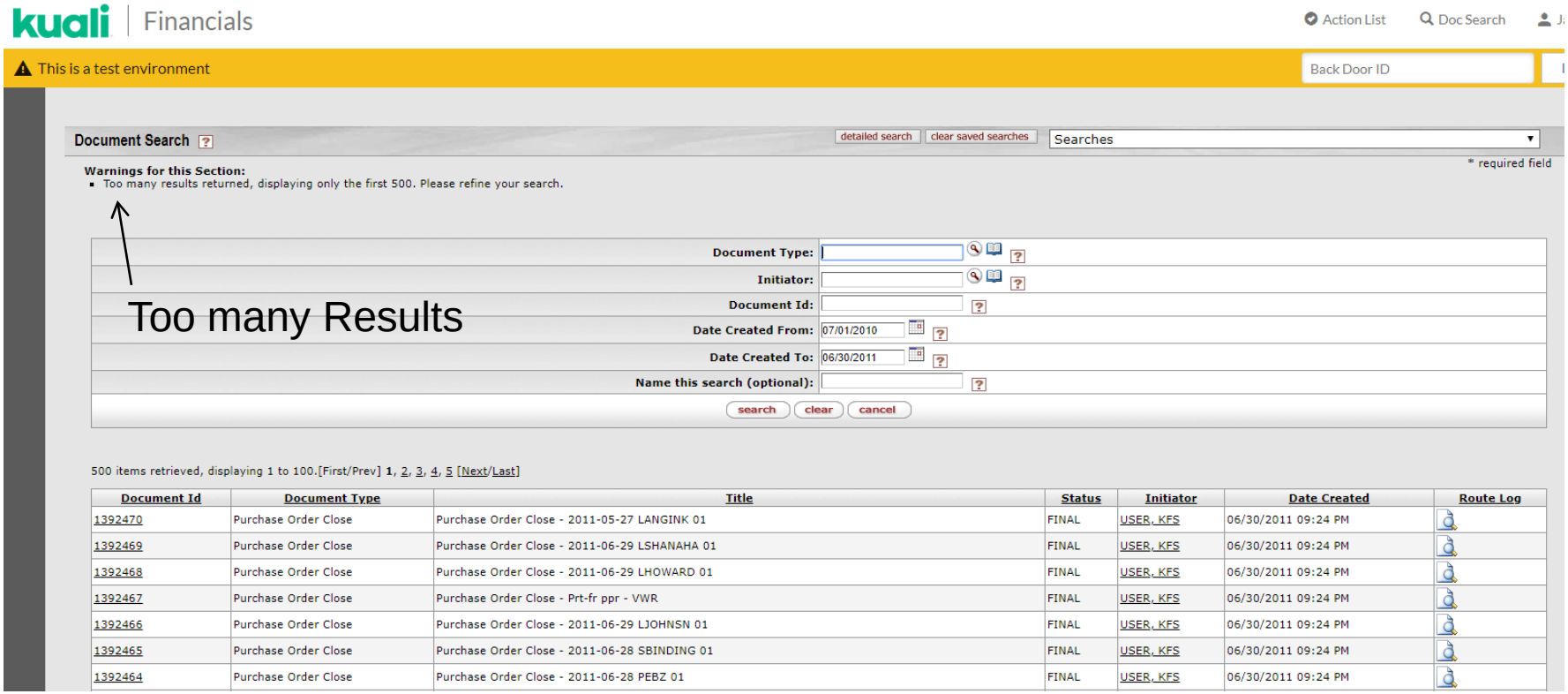
Date of Document Search

Allows you to search by a date range.



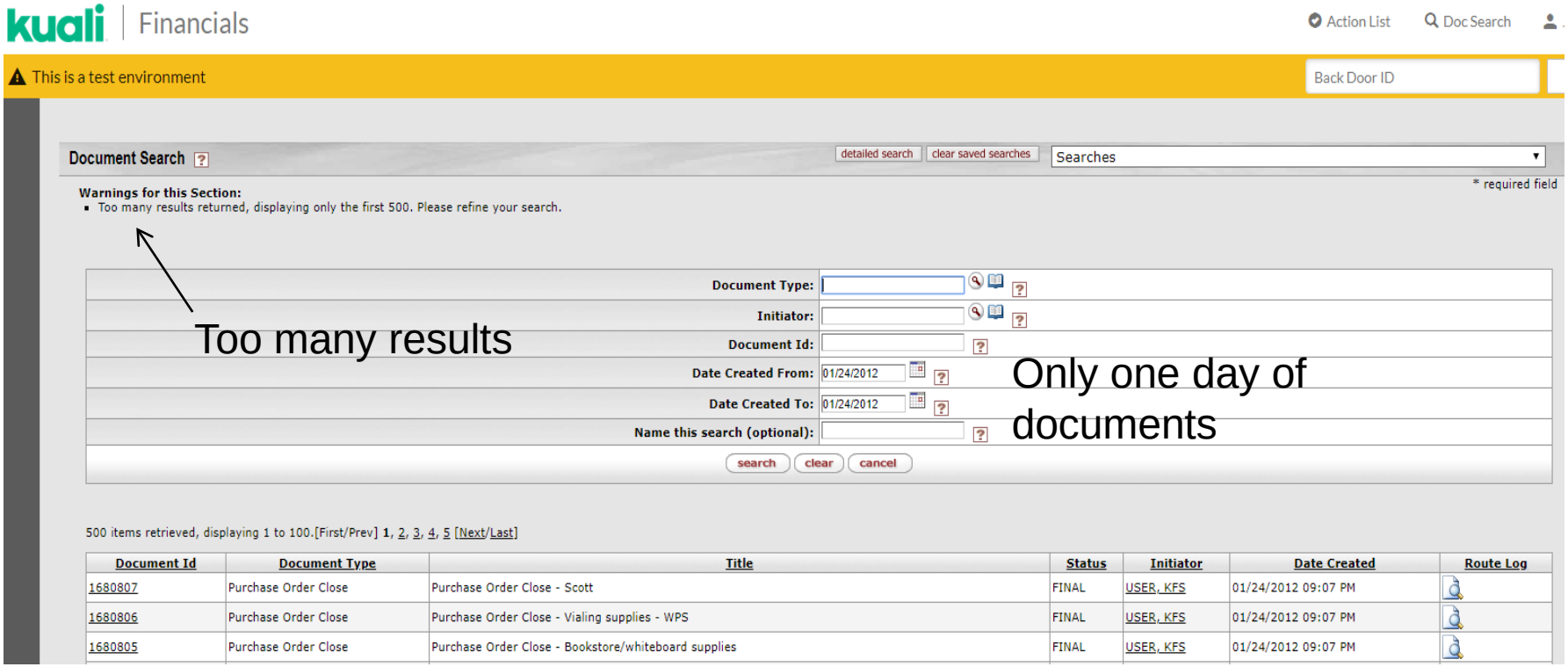
Date of Document Search

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



Date of Document Search

One day of production produces too many results.

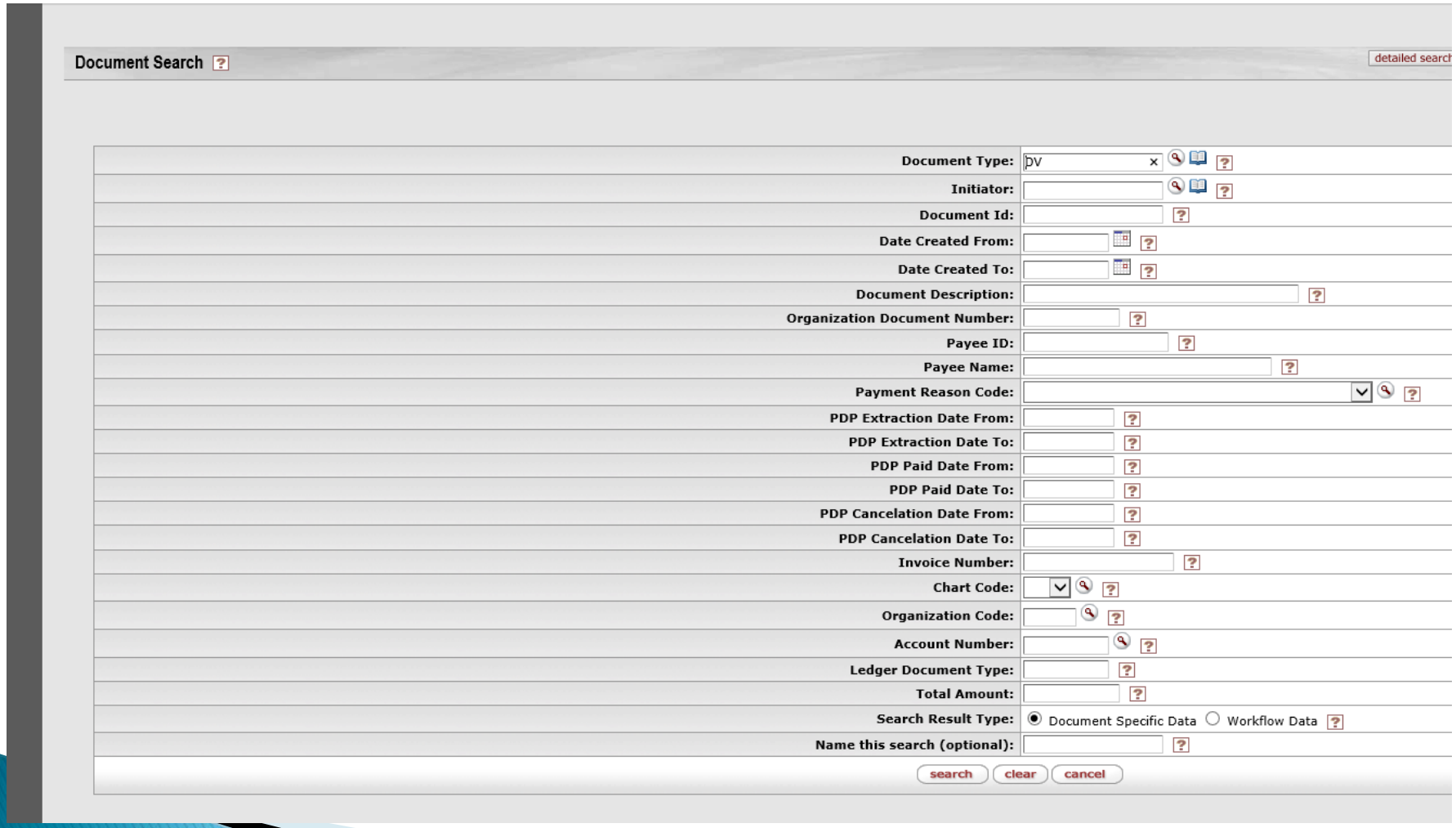


Disbursement Voucher

Custom Document Searches

Colorado State University

kuali | Financials



Custom Document Searches

EXAMPLE 1: Disbursement Voucher

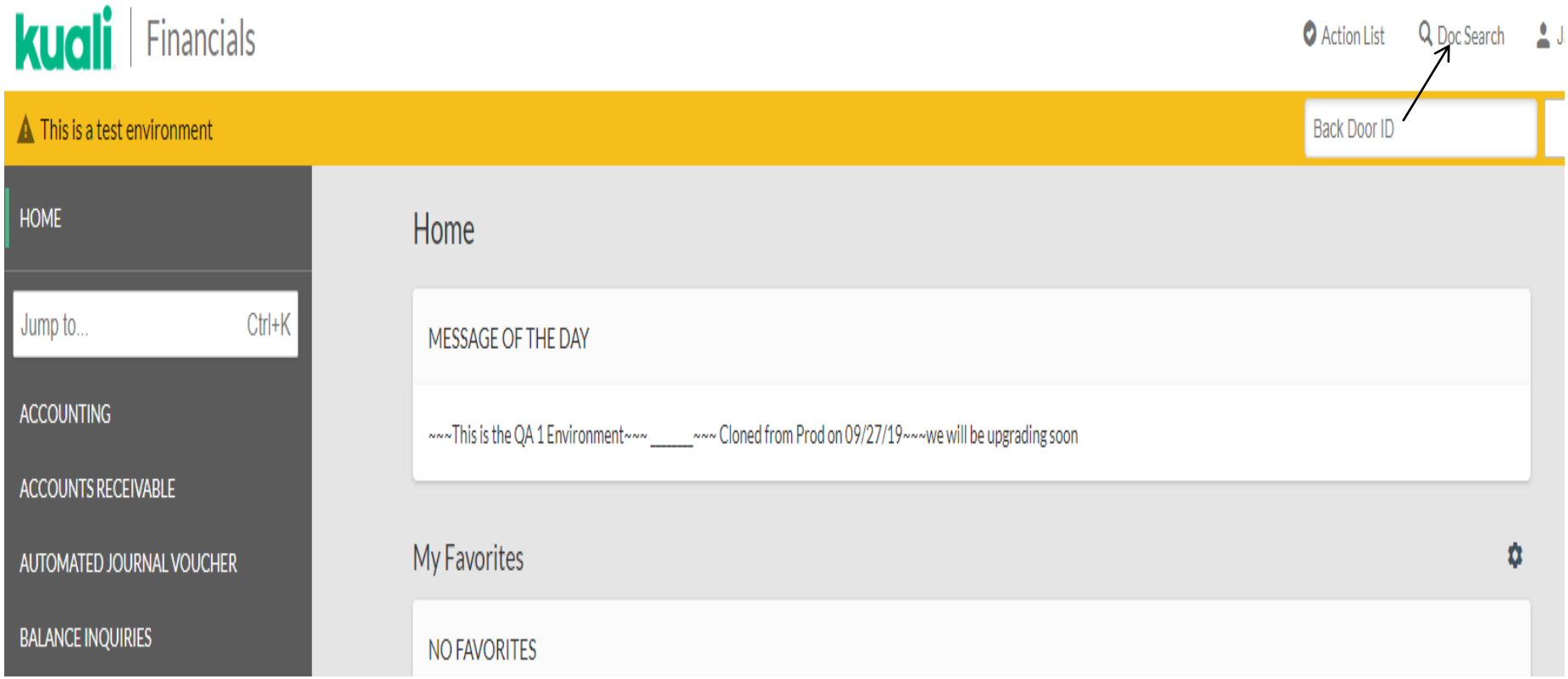
a) One of your employees is planning to attend the CCI Conference. In order to see if you have enough funds available to cover the cost of the registration for the conference, you want to find the registration cost for a prior year. You don't know the actual date that the conference previously occurred, but you do know that it was in FY 2017, and you know that it hit account "1270000." How would you find this document?

b) Lets say you didn't know what the name of the conference is, but instead only knew the payee name which is "Colo Counties" and that it posted in FY17 to account 1270000. How would you find this document?

Payment Request

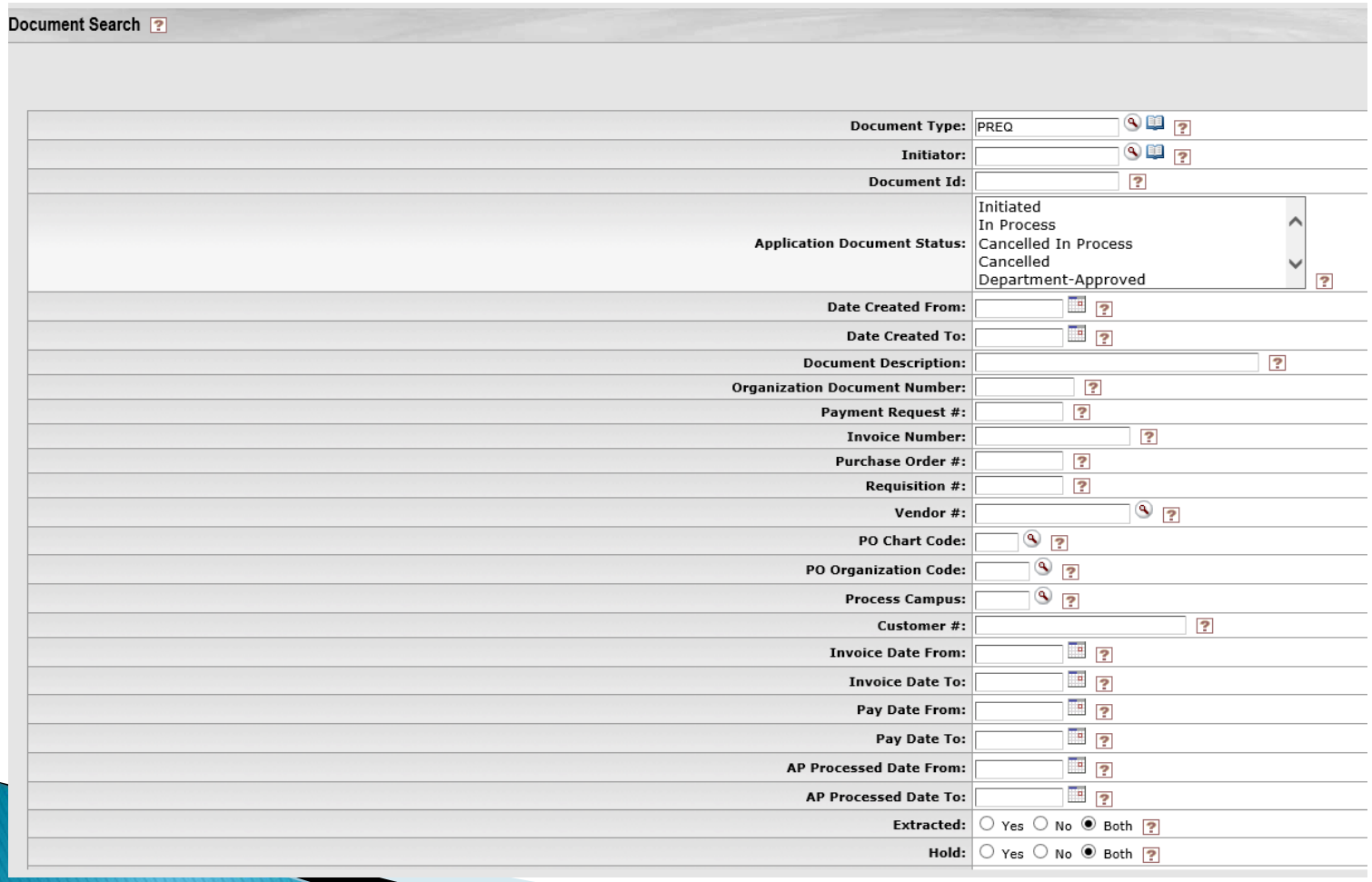
Custom Document Searches

Payments Requests



Custom Document Searches

Payments Requests



Custom Document Searches

Colorado State University

EXAMPLE 2: Payment Request

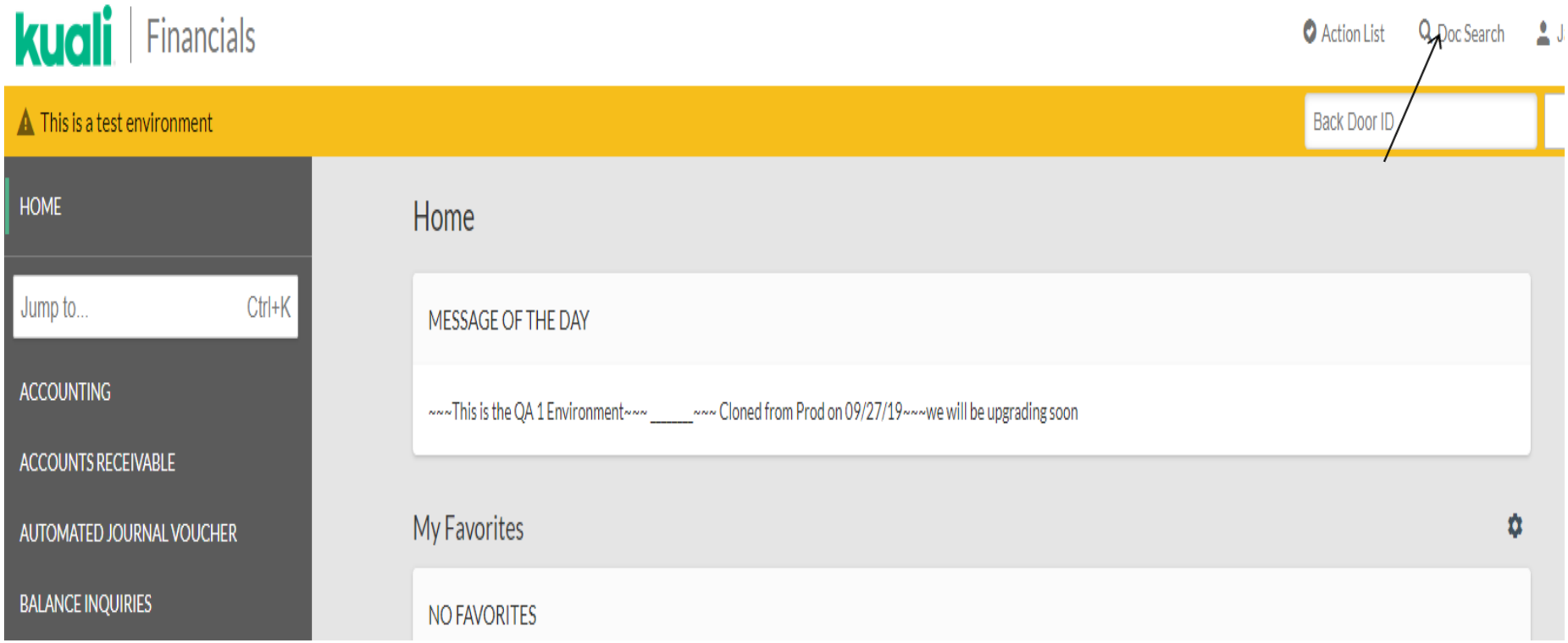
a) ***You are trying to find a Payment Request you know was initiated during the period of 2/3/12 - 2/13/12, and was for the Vendor "Apple Inc." How would you find this document?***

b) ***Now lets say you don't know the vendor, but you do know the purchase order number "318182" for a computer you have purchased. This was during the timeframe 2/3/2012-2/13/2012. How would you find this payment request.***

Purchase Order

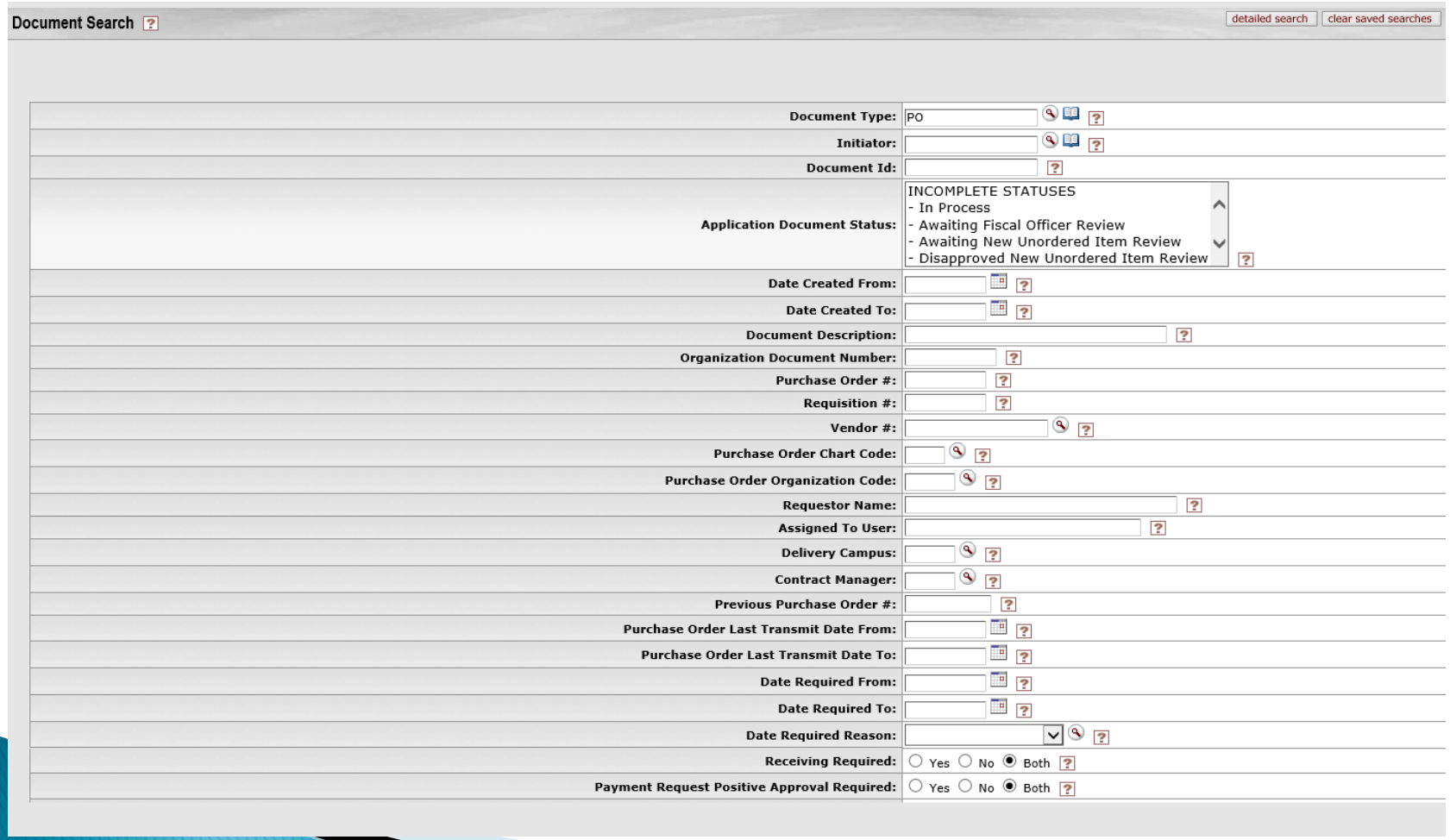
Custom Document Searches

Purchase Orders



Custom Document Searches

Purchase Orders



Custom Document Searches

EXAMPLE 5: Purchase Orders

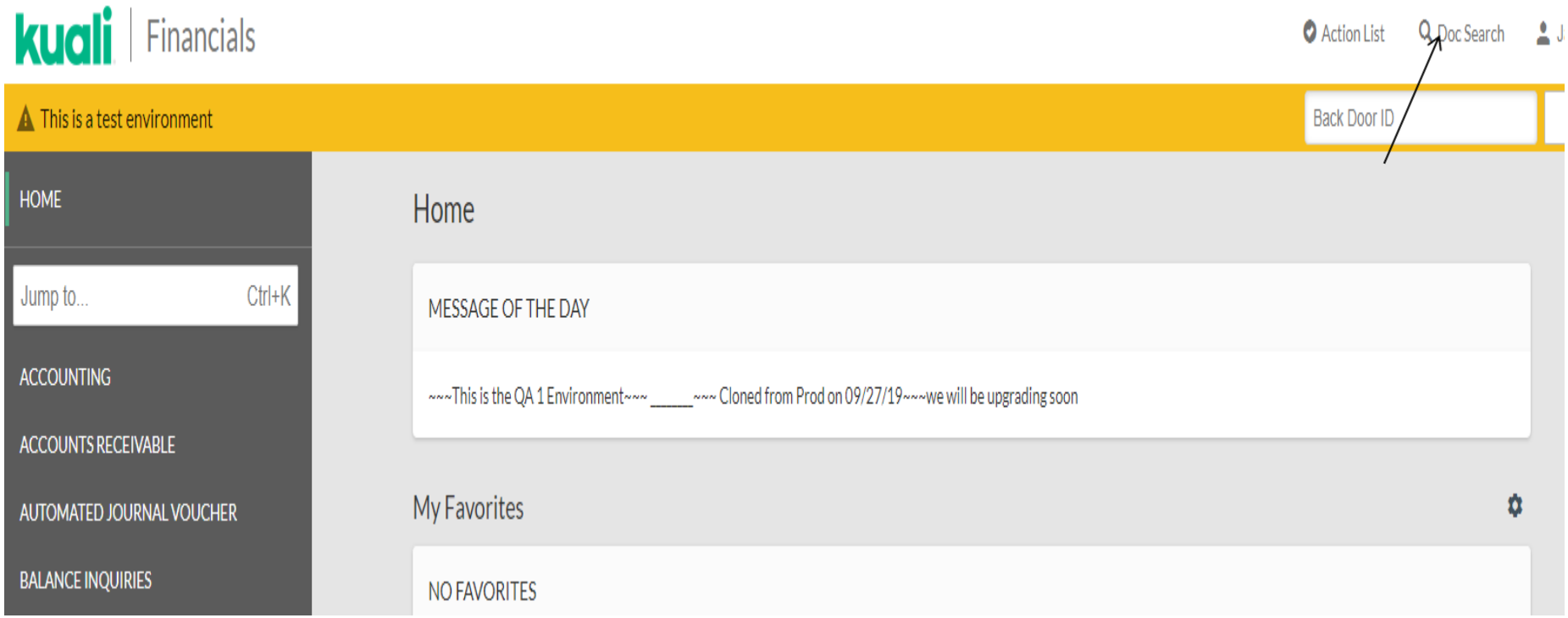
a) ***You have been asked to find a purchase order for your organization (8031), and it was in the amount of $1,500. The person doesn't know when the Purchase Order was done, but only knows the amount was $1,500. How would you find this document?***

a) ***If you don't have any other information but know that the PO was for "Warming Blankets". How would you find this document?***

Receiving

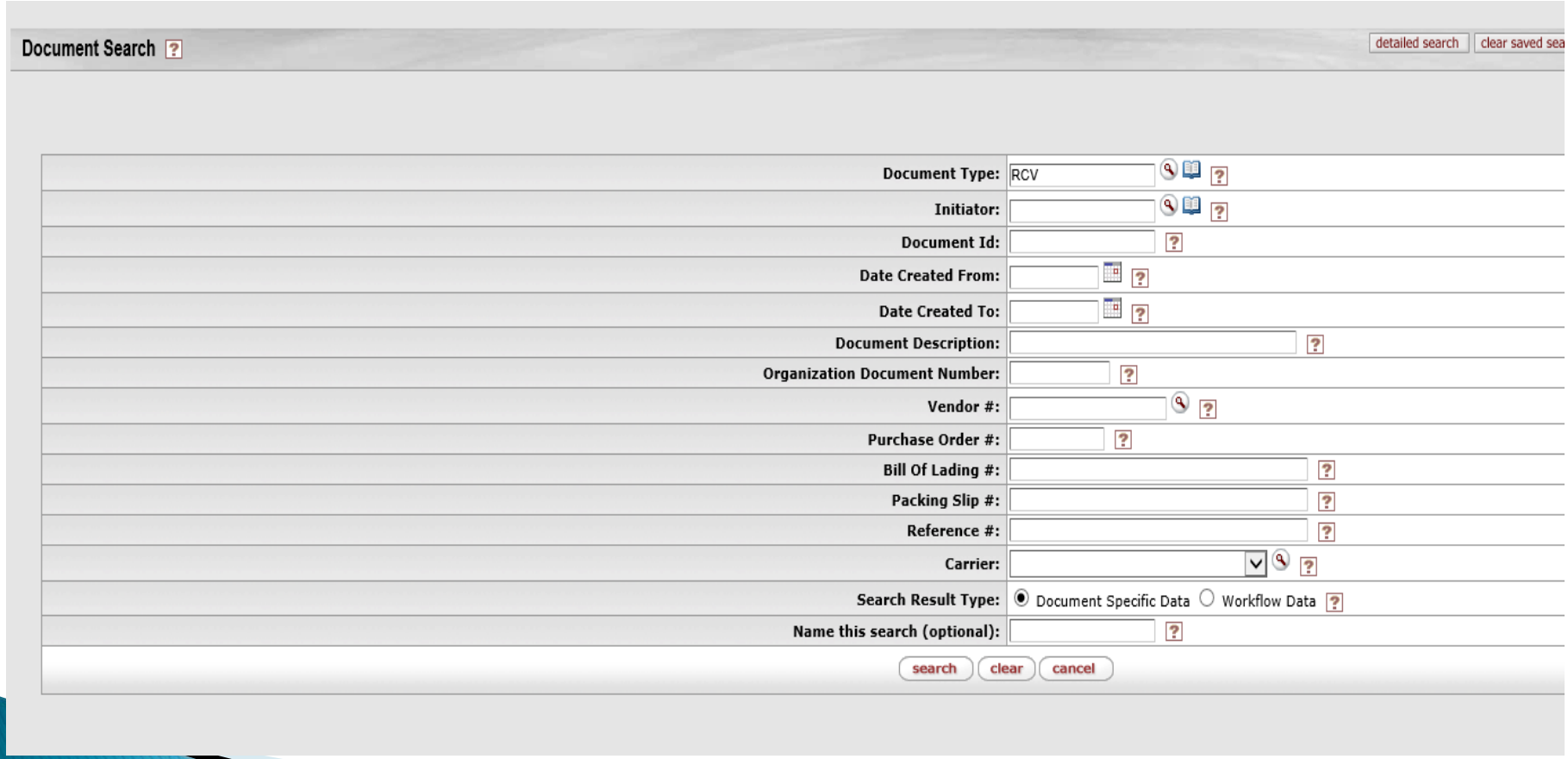
Custom Document Searches

Receiving



Custom Document Searches

Receiving



Custom Document Searches

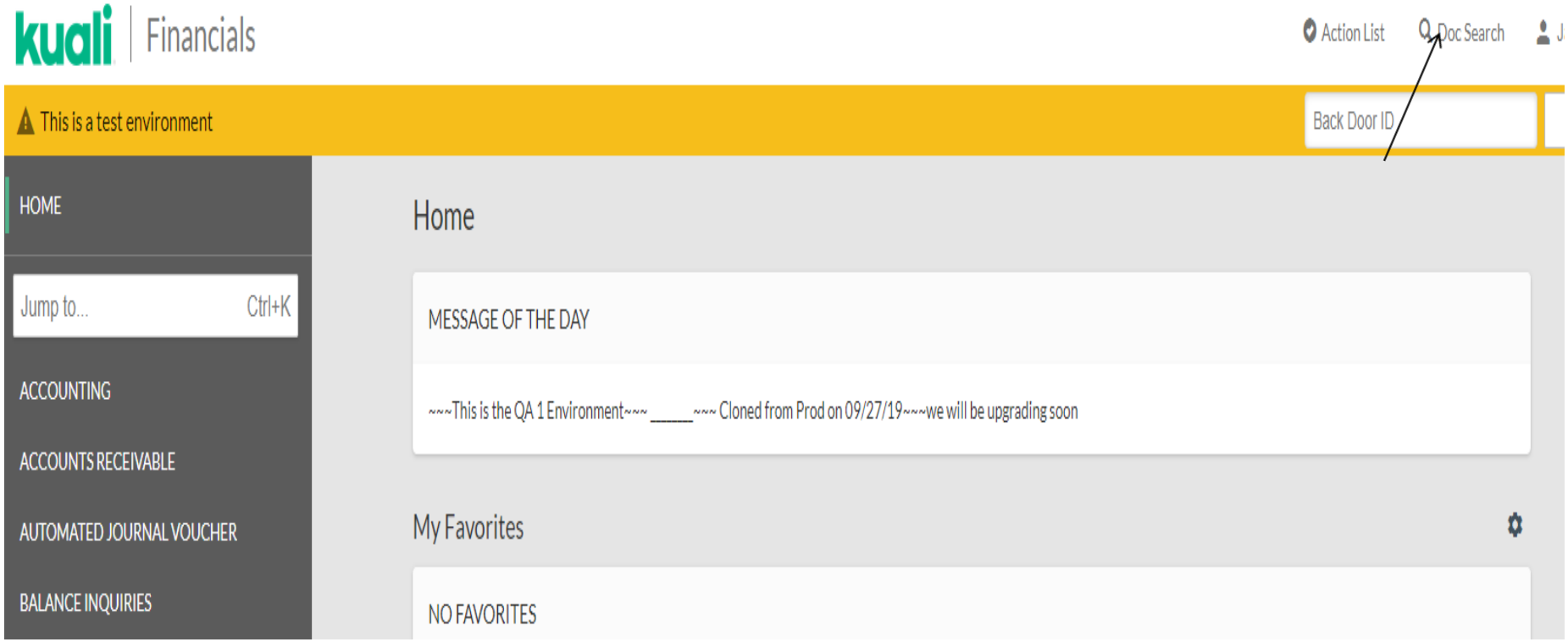
EXAMPLE 6: Receiving

a) You are searching for a Receiving document that was initiated by "kkita@colostate.edu" and is for TKW LLC. How would you find this document?

Requisition

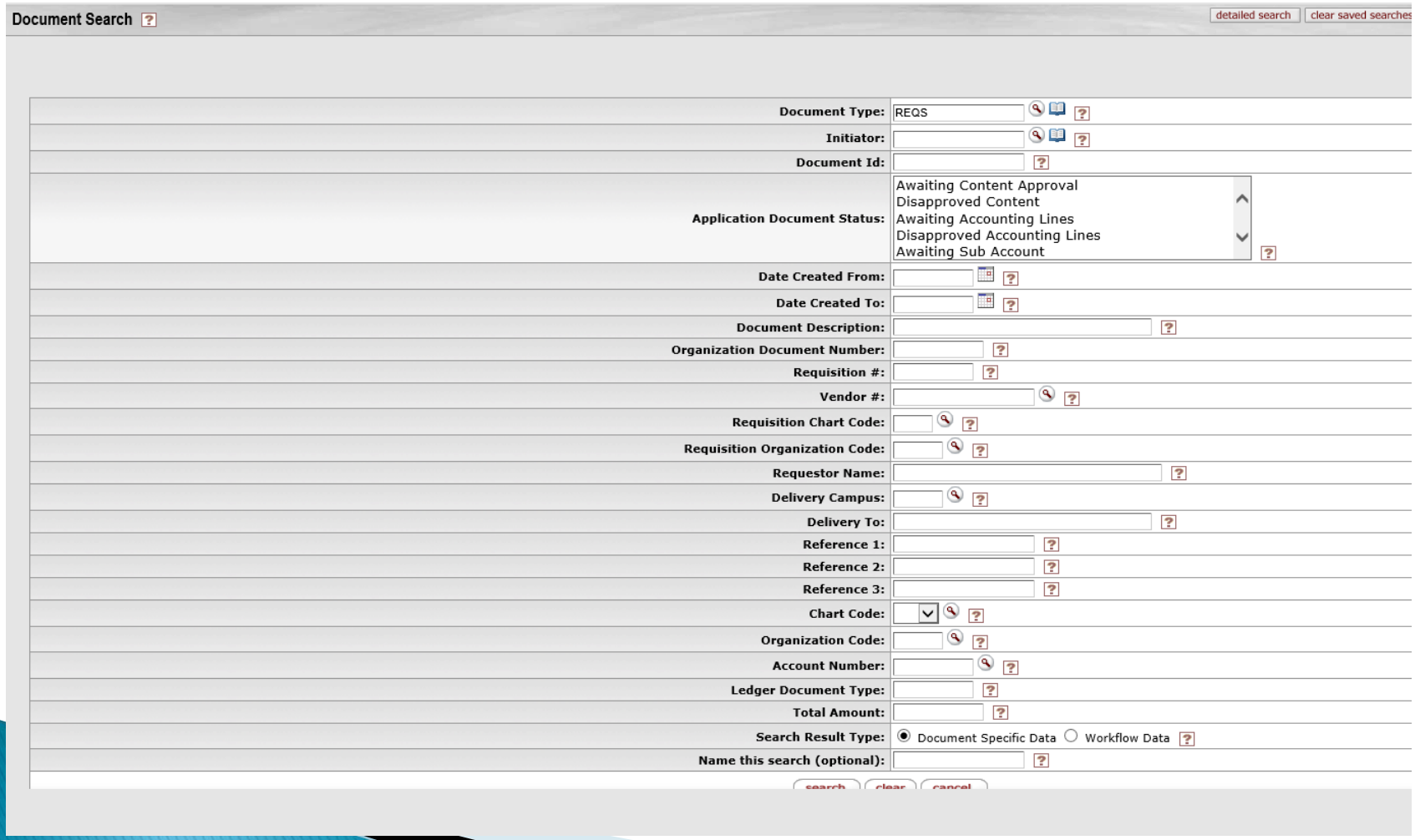
Custom Document Searches

Requisitions



Custom Document Searches

Requisitions



Custom Document Searches

EXAMPLE 9: Requisition

a) ***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) ***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

Character	Function	Example	Returns:
* Or %	Wildcard	21*	Matches on any record that starts with 21
|	Or	1356610|2608000	Matches on either value
!	Not equal to	!1356610	Matches on records except for 1356610
>	Greater than	>5999	Matches on records greater than 5999
<	Less than	<5000	Matches on records less than 5000
>=	Greater than or equal to	>=6000	Matches on records greater than or equal to 6000
<=	Less than or equal to	<=4999	Matches on records less than or equal to 4999
?	Match a single character	135?610	Matches on records that start with 135 and end with 610
..	Between (range of values)	6200..6699	Matches on records between 6200 and 6699

Questions ???

Colorado State University

Contact your Campus Service Representative with Kuali questions

Kris King	491-6752
Publina Meldrum	491-4148
Summer Leaming	491-2801