KUALI DOCUMENT SEARCH
INCLUDING WILD CARD FEATURES

Presented by Campus Services
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.

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

Administrative Applications and Resources

Non-production Applications

Test
  - ARIES/Banner
  - Time Clock
  - Vista Plus

Training
  - Kuali Financial System
  - Kuali Research (KR)

Application Systems
  - Applications Manager
  - ARIES/Banner
  - ARIESt web
  - Conflict of Interest (COI)
  - Data Access Request
  - ETHORITY
  - FAMIS Self-Service
  - HR System
  - I-9 System
  - Kuali Financial System (KFS)
  - Kuali Research (KR)
  - Talent Management System
  - Time Clock
  - Vista Plus

Non-production Applications
Overview:

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

[Image of a screenshot of the Kuali financial systems website showing a document lookup form with fields for Type, Initiator, Document/Notification Id, Date Created From, Date Created To, and Name this search (optional).]
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

Notice the screen changes.
Document Search Screen

Only 500 Results

<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>
<th>Route Log</th>
</tr>
</thead>
<tbody>
<tr>
<td>1675187</td>
<td>Timed Power Cylinder Lube Oil Injection</td>
<td>CO</td>
<td>356280</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1675186</td>
<td>Quartern Center at CSU Teacher #1</td>
<td>CO</td>
<td>340290</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1675185</td>
<td>Economics of Innovative Water Sharing wi</td>
<td>CO</td>
<td>301070</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1675184</td>
<td>Estimating the Short and Long-term Econo</td>
<td>CO</td>
<td>301060</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1675179</td>
<td>A Web Skin for the Four Corners Region</td>
<td>CO</td>
<td>359010</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1675178</td>
<td>4-H National Mentoring Program</td>
<td>CO</td>
<td>355050</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1675177</td>
<td>Environmental Effects on Harbor Seal Mov</td>
<td>CO</td>
<td>355010</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1675176</td>
<td>High Sensitivity, Molecular Contrast Mic</td>
<td>CO</td>
<td>348110</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1675175</td>
<td>Quartern Center at CSU Teacher #2</td>
<td>CO</td>
<td>340300</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Document Search Screen

All ACCT documents containing 5355050 for last 12 months

Narrow Search by using account number or changing date fields

Example search results:

- Document/Notification Id: 123456
- Document Description: 4-H National Mentoring Program
- Organization Document Number: CO
- Account Number: 5355050
- Route Log: [Icon]
Document Search Screen

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

<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>
<th>Route Log</th>
</tr>
</thead>
<tbody>
<tr>
<td>16751278</td>
<td>4-H National Mentoring Program</td>
<td>CO</td>
<td>5355050</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1579459</td>
<td>4-H National Mentoring Program</td>
<td>CO</td>
<td>5355050</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1453233</td>
<td>4-H National Mentoring Program</td>
<td>CO</td>
<td>5355050</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1430266</td>
<td>4-H National Mentoring Program</td>
<td>CO</td>
<td>5355050</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1211203</td>
<td>4-H National Mentoring Program</td>
<td>CO</td>
<td>5355050</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1219156</td>
<td>4-H National Mentoring Program</td>
<td>CO</td>
<td>5355050</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 search icon to search for a person.
**Initiator (EID) Search**

Enter the person's last name and click search.

![Kuali financial systems](http://kfsprod.is.colostate.edu:8380/)

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principal Name:</td>
<td></td>
</tr>
<tr>
<td>Principal ID:</td>
<td></td>
</tr>
<tr>
<td>Entity ID:</td>
<td></td>
</tr>
<tr>
<td>First Name:</td>
<td></td>
</tr>
<tr>
<td>Middle Name:</td>
<td></td>
</tr>
<tr>
<td>Last Name:</td>
<td></td>
</tr>
<tr>
<td>Email Address:</td>
<td></td>
</tr>
<tr>
<td>Phone Number:</td>
<td></td>
</tr>
<tr>
<td>Employee ID:</td>
<td></td>
</tr>
<tr>
<td>Employee ID:</td>
<td></td>
</tr>
<tr>
<td>Campus Code:</td>
<td></td>
</tr>
<tr>
<td>Primary Department Code</td>
<td></td>
</tr>
<tr>
<td>Employee Status Code:</td>
<td></td>
</tr>
<tr>
<td>Employee Type Code:</td>
<td></td>
</tr>
<tr>
<td>Active Indicators:</td>
<td></td>
</tr>
</tbody>
</table>

[Search, Clear, Cancel]
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.

Too many results use dates and doc type to narrow your results
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.
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.
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
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?
Custom Document Searches
Payments Requests
Custom Document Searches

Payments Requests

<table>
<thead>
<tr>
<th>Type</th>
<th>Initiator</th>
</tr>
</thead>
<tbody>
<tr>
<td>DocID</td>
<td>Notification ID</td>
</tr>
<tr>
<td>Date Created From</td>
<td>Date Created To</td>
</tr>
<tr>
<td>Document Description</td>
<td>Organization Document Number</td>
</tr>
<tr>
<td>Payment request #</td>
<td>Purchase Order #</td>
</tr>
<tr>
<td>Invoice Number</td>
<td>Requisition #</td>
</tr>
<tr>
<td>Vendor #</td>
<td>PO Chart Code</td>
</tr>
<tr>
<td>PO Organization Code</td>
<td>Process Campus</td>
</tr>
<tr>
<td>Customer #</td>
<td>Invoice Date From</td>
</tr>
<tr>
<td>Invoice Date To</td>
<td>Pay Date From</td>
</tr>
<tr>
<td>Pay Date To</td>
<td>AP Processed Date From</td>
</tr>
<tr>
<td>AP Processed Date To</td>
<td>AP Extracted</td>
</tr>
<tr>
<td>Paid</td>
<td>Request Cancel</td>
</tr>
<tr>
<td>Payment Request Status</td>
<td>Auto-Approved</td>
</tr>
<tr>
<td>Receiving Required</td>
<td>Payment Request Positive Approval Required</td>
</tr>
<tr>
<td>Chart Code</td>
<td>Account Number</td>
</tr>
<tr>
<td>Account Number</td>
<td>Organization Code</td>
</tr>
<tr>
<td>Ledger Document Type</td>
<td>Total Amount</td>
</tr>
<tr>
<td>Search Result Type</td>
<td>Document Specific Date</td>
</tr>
<tr>
<td>Name this search (optional):</td>
<td>Workflow Date</td>
</tr>
</tbody>
</table>
Custom Document Searches

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.
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](image-url)
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?
Custom Document Searches

Requisitions
Custom Document Searches

Requisitions

<table>
<thead>
<tr>
<th>Type</th>
<th>Initiator</th>
<th>Document/Notification Id</th>
<th>Date Created From</th>
<th>Date Created To</th>
<th>Document Description</th>
<th>Organization Document Number</th>
<th>Requisition #</th>
<th>Vendor #</th>
<th>Requisition Chart Code</th>
<th>Requisition Organization Code</th>
<th>Requestor Name</th>
<th>Delivery Campus</th>
<th>Delivery To</th>
<th>Reference 1</th>
<th>Reference 2</th>
<th>Reference 3</th>
<th>Requisition Status</th>
<th>Chart Code</th>
<th>Account Number</th>
<th>Organization Code</th>
<th>Ledger Document Type</th>
<th>Total Amount</th>
<th>Search Result Type</th>
<th>Name this search (optional):</th>
</tr>
</thead>
<tbody>
<tr>
<td>RGS</td>
<td></td>
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<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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
<table>
<thead>
<tr>
<th>Character</th>
<th>Function</th>
<th>Example</th>
<th>Returns:</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Or %</td>
<td>Wildcard</td>
<td>21*</td>
<td>Matches on any record that starts with 21</td>
</tr>
<tr>
<td></td>
<td>Or</td>
<td>1356610</td>
<td>2608000</td>
</tr>
<tr>
<td>!</td>
<td>Not equal to</td>
<td>!1356610</td>
<td>Matches on records except for 1356610</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than</td>
<td>&gt;5999</td>
<td>Matches on records greater than 5999</td>
</tr>
<tr>
<td>&lt;</td>
<td>Less than</td>
<td>&lt;5000</td>
<td>Matches on records less than 5000</td>
</tr>
<tr>
<td>&gt;=</td>
<td>Greater than or equal to</td>
<td>&gt;=6000</td>
<td>Matches on records greater than or equal to 6000</td>
</tr>
<tr>
<td>&lt;=</td>
<td>Less than or equal to</td>
<td>&lt;=4999</td>
<td>Matches on records less than or equal to 4999</td>
</tr>
<tr>
<td>?</td>
<td>Match a single character</td>
<td>135?610</td>
<td>Matches on records that start with 135 and end with 610</td>
</tr>
<tr>
<td>..</td>
<td>Between (range of values)</td>
<td>6200..6699</td>
<td>Matches on records between 6200 and 6699</td>
</tr>
</tbody>
</table>
Questions

Contact your Campus Service Representative with Kuali questions

Erin Mercurio 491–6752
Publina Meldrum 491–4148
Summer Leaming 491–2801