KUALI DOCUMENT SEARCH INCLUDING WILD CARD FEATURES

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.

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

Non-production Applications

Test
- ARIES/Banner
- Time Clock
- Vista Plus

Training
- Kuali Financial System
- Kuali Research (KR)

Application Systems
- Applications Manager
- ARIES/Banner
- ARIEsweb
- 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 Overview
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.
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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Type</td>
<td>Enter the type of document.</td>
</tr>
<tr>
<td>Initiator</td>
<td>Enter the name of the person who initiated the document.</td>
</tr>
<tr>
<td>Document Id</td>
<td>Enter the unique identifier for the document.</td>
</tr>
<tr>
<td>Date Created From</td>
<td>Enter the date the document was created.</td>
</tr>
<tr>
<td>Date Created To</td>
<td>Enter the date the document was last updated.</td>
</tr>
<tr>
<td>Name this search (optional)</td>
<td>Enter a name for this search.</td>
</tr>
</tbody>
</table>

* required field
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

<table>
<thead>
<tr>
<th>Document Id</th>
<th>Status</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>20627737</td>
<td>PROCESSED</td>
<td>NEAT - CIRA Support to NESDIS Environ...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20627796</td>
<td>PROCESSED</td>
<td>ARI (CLP) CIRA Support for Research a...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20627765</td>
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<td>Sustainable Range Program ITAM Prog...</td>
<td></td>
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<td></td>
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<tr>
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<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>20627793</td>
<td>PROCESSED</td>
<td>19CPG Thousand Cankers</td>
<td></td>
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<td></td>
<td></td>
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</table>
Document Search Screen

Only 500 Results

<table>
<thead>
<tr>
<th>Document Id</th>
<th>Status</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>FINAL</td>
<td>Timed Power Cylinder Lube Oil Injection</td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>1675186</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1675181</td>
<td>FINAL</td>
<td>Economics of Innovative Water Sharing wi</td>
<td>CO</td>
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<td></td>
<td></td>
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<tr>
<td>1675184</td>
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<td></td>
<td></td>
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<td>1972172</td>
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<td>A Web Skin for the Four Corners Region</td>
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<tr>
<td>1675178</td>
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<td>4-H National Mentoring Program</td>
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<td>1675177</td>
<td>FINAL</td>
<td>Environmental Effects on Harbor Seal Mov</td>
<td>CO</td>
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<td></td>
<td></td>
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<tr>
<td>1675176</td>
<td>FINAL</td>
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<td>CO</td>
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<td></td>
<td></td>
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<tr>
<td>1675175</td>
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<td></td>
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<tr>
<td>1675174</td>
<td>FINAL</td>
<td>A Novel Experimental 4-Model Study of</td>
<td>CO</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Document Search Screen

All ACCT documents containing 5355050 for 12 month period

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.

<table>
<thead>
<tr>
<th>Document Id</th>
<th>Status</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>1675170</td>
<td>FINAL</td>
<td>4-H National Mentoring Program</td>
<td>CO</td>
<td></td>
<td>5355050</td>
<td></td>
</tr>
<tr>
<td>15794559</td>
<td>FINAL</td>
<td>4-H National Mentoring Program</td>
<td>CO</td>
<td></td>
<td>5355050</td>
<td></td>
</tr>
<tr>
<td>1452053</td>
<td>FINAL</td>
<td>4-H National Mentoring Program</td>
<td>CO</td>
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<td>5355050</td>
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<td>5355050</td>
<td></td>
</tr>
<tr>
<td>1222202</td>
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<td>CO</td>
<td></td>
<td>5355050</td>
<td></td>
</tr>
<tr>
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<td>CO</td>
<td></td>
<td>5355050</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 to search for a person.
Initiator (EID) Search

Click on return value next to the persons name.

<table>
<thead>
<tr>
<th>Principal Name:</th>
<th></th>
</tr>
</thead>
<tbody>
<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>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 Indicator:</td>
<td>Yes</td>
</tr>
</tbody>
</table>

One has retrieved:

<table>
<thead>
<tr>
<th>Return Value</th>
<th>Principal ID</th>
<th>Principal Name</th>
<th>Name</th>
<th>Entity ID</th>
<th>Campus Code</th>
<th>Primary Department Code</th>
<th>Employee ID</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>68824</td>
<td><a href="mailto:sleaming@colostate.edu">sleaming@colostate.edu</a></td>
<td>Learning, Summer 8</td>
<td>39461</td>
<td>MC</td>
<td>CO-4203</td>
<td>830199583</td>
</tr>
</tbody>
</table>

Export options: CSV | spreadsheet | XLS
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 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.

<table>
<thead>
<tr>
<th>Account</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

**DOCUMENT OVERVIEW**

**OVERVIEW**

* Description: Increasing the Adaptive Capacity of Mong

Organization Document Number: 

**ACCOUNT MAINTENANCE**

<table>
<thead>
<tr>
<th>PREVIOUS</th>
<th>PROPOSED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chart Code: CO</td>
<td>Chart Code: CO</td>
</tr>
<tr>
<td>Account Number: 5396510</td>
<td>Account Number: 5396510</td>
</tr>
<tr>
<td>Account Title: Increasing the Adaptive Capacity of Mong</td>
<td>Account Title: Increasing the Adaptive Capacity of Mong</td>
</tr>
<tr>
<td>Organization Code: 1472</td>
<td>Organization Code: 1472</td>
</tr>
<tr>
<td>Campus Code: MC - CSU Main Campus</td>
<td>Campus Code: MC - CSU Main Campus</td>
</tr>
<tr>
<td>Account Effective Date: 11/01/2010</td>
<td>Account Effective Date: 11/01/2010</td>
</tr>
<tr>
<td>Account Postal Code: 80523</td>
<td>Account Postal Code: 80523</td>
</tr>
</tbody>
</table>
Document/Notification Search
Just enter the document 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.
Disbursement Voucher
# Custom Document Searches

- **Document Search**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Type</td>
<td>Document Type filter (DV)</td>
</tr>
<tr>
<td>Initiator</td>
<td>Initiator filter</td>
</tr>
<tr>
<td>Document Id</td>
<td>Document Id filter</td>
</tr>
<tr>
<td>Date Created From</td>
<td>Date created from filter</td>
</tr>
<tr>
<td>Date Created To</td>
<td>Date created to filter</td>
</tr>
<tr>
<td>Document Description</td>
<td>Document description filter</td>
</tr>
<tr>
<td>Organization Document Number</td>
<td>Organization document number filter</td>
</tr>
<tr>
<td>Payee ID</td>
<td>Payee ID filter</td>
</tr>
<tr>
<td>Payee Name</td>
<td>Payee name filter</td>
</tr>
<tr>
<td>Payment Reason Code</td>
<td>Payment reason code filter</td>
</tr>
<tr>
<td>PDP Extraction Date From</td>
<td>PDP extraction date from filter</td>
</tr>
<tr>
<td>PDP Extraction Date To</td>
<td>PDP extraction date to filter</td>
</tr>
<tr>
<td>PDP Paid Date From</td>
<td>PDP paid date from filter</td>
</tr>
<tr>
<td>PDP Paid Date To</td>
<td>PDP paid date to filter</td>
</tr>
<tr>
<td>PDP Cancellation Date From</td>
<td>PDP cancellation date from filter</td>
</tr>
<tr>
<td>PDP Cancellation Date To</td>
<td>PDP cancellation date to filter</td>
</tr>
<tr>
<td>Invoice Number</td>
<td>Invoice number filter</td>
</tr>
<tr>
<td>Chart Code</td>
<td>Chart code filter</td>
</tr>
<tr>
<td>Organization Code</td>
<td>Organization code filter</td>
</tr>
<tr>
<td>Account Number</td>
<td>Account number filter</td>
</tr>
<tr>
<td>Ledger Document Type</td>
<td>Ledger document type filter</td>
</tr>
<tr>
<td>Total Amount</td>
<td>Total amount filter</td>
</tr>
<tr>
<td>Search Result Type</td>
<td>Search result type filter (Document Specific Data, Workflow Data)</td>
</tr>
<tr>
<td>Name this search (optional)</td>
<td>Name this search (optional)</td>
</tr>
</tbody>
</table>

**Buttons:**
- search
- clear
- cancel
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
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 let's 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

This is a test environment

Home

MESSAGE OF THE DAY

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My Favorites

NO FAVORITES
## Custom Document Searches

### Purchase Orders

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Document Type:</strong></td>
<td>PO</td>
</tr>
<tr>
<td><strong>Initiator:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Document Id:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Application Document Status:</strong></td>
<td>Incomplete Statuses</td>
</tr>
<tr>
<td></td>
<td>- In Process</td>
</tr>
<tr>
<td></td>
<td>- Awaiting Fiscal Officer Review</td>
</tr>
<tr>
<td></td>
<td>- Awaiting New Unordered Item Review</td>
</tr>
<tr>
<td><strong>Date Created From:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Date Created To:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Document Description:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Organization Document Number:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Purchase Order #:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Requisition #:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Vendor #:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Purchase Order Chart Code:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Purchase Order Organization Code:</strong></td>
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<td><strong>Requestor Name:</strong></td>
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<td><strong>Assigned To User:</strong></td>
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<td><strong>Delivery Campus:</strong></td>
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<td><strong>Contract Manager:</strong></td>
<td></td>
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<tr>
<td><strong>Previous Purchase Order #:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Purchase Order Last Transmit Date From:</strong></td>
<td></td>
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<tr>
<td><strong>Purchase Order Last Transmit Date To:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Date Required From:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Date Required To:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Date Required Reason:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Receiving Required:</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Payment Request Positive Approval Required:</strong></td>
<td>Yes</td>
</tr>
</tbody>
</table>
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?
Custom Document Searches
Receiving

MESSAGE OF THE DAY

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My Favorites

NO FAVORITES
Custom Document Searches

Receiving

<table>
<thead>
<tr>
<th>Document Search</th>
<th>detailed search</th>
<th>clear saved search</th>
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</thead>
<tbody>
<tr>
<td><strong>Document Type:</strong></td>
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</tr>
<tr>
<td><strong>Document Id:</strong></td>
<td><img src="?" alt="Help" /></td>
<td></td>
</tr>
<tr>
<td><strong>Date Created From:</strong></td>
<td><img src="?" alt="Help" /></td>
<td></td>
</tr>
<tr>
<td><strong>Date Created To:</strong></td>
<td><img src="?" alt="Help" /></td>
<td></td>
</tr>
<tr>
<td><strong>Document Description:</strong></td>
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<td></td>
</tr>
<tr>
<td><strong>Organization Document Number:</strong></td>
<td><img src="?" alt="Help" /></td>
<td></td>
</tr>
<tr>
<td><strong>Vendor #:</strong></td>
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<tr>
<td><strong>Purchase Order #:</strong></td>
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<td></td>
</tr>
<tr>
<td><strong>Bill Of Lading #:</strong></td>
<td><img src="?" alt="Help" /></td>
<td></td>
</tr>
<tr>
<td><strong>Packing Slip #:</strong></td>
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<td></td>
</tr>
<tr>
<td><strong>Reference #:</strong></td>
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<td></td>
</tr>
<tr>
<td><strong>Carrier:</strong></td>
<td><img src="?" alt="Help" /></td>
<td></td>
</tr>
<tr>
<td><strong>Search Result Type:</strong></td>
<td><img src="?" alt="Circle" />[Document Specific Data] <img src="?" alt="Circle" />[Workflow Data]</td>
<td><img src="?" alt="Help" /></td>
</tr>
<tr>
<td><strong>Name this search (optional):</strong></td>
<td><img src="?" alt="Help" /></td>
<td></td>
</tr>
</tbody>
</table>
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

This is a test environment

Home

MESSAGE OF THE DAY

~~~This is the QA 1 Environment~~~ _______ Cloned from Prod on 09/27/19~~~we will be upgrading soon

My Favorites

NO FAVORITES
## Custom Document Searches

### Requisitions

<table>
<thead>
<tr>
<th>Document Type:</th>
<th>REQS</th>
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</thead>
<tbody>
<tr>
<td>Initiator:</td>
<td></td>
</tr>
<tr>
<td>Document Id:</td>
<td></td>
</tr>
<tr>
<td>Application Document Status:</td>
<td>Awaiting Content Approval, Disapproved Content, Awaiting Accounting Lines, Disapproved Accounting Lines, Awaiting Sub Account</td>
</tr>
<tr>
<td>Date Created From:</td>
<td></td>
</tr>
<tr>
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<tr>
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<td>Total Amount:</td>
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<td>Search Result Type:</td>
<td>Document Specific Data, Workflow Data</td>
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<tr>
<td>Name this search (optional):</td>
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</tbody>
</table>

[Document Search Form]

[Logo: Colorado State University]
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
<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>
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<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>
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<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>
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<tr>
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<td>Less than or equal to</td>
<td>&lt;=4999</td>
<td>Matches on records less than or equal to 4999</td>
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<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

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