

# KUALI DOCUMENT SEARCH INCLUDING WILD CARD FEATURES

Presented by Campus Services

# Campus Services

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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.

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# Log in to KFS – Training Environment

Administrative Applications and Resources

Home Reporting Research



## Non-production Applications

### Test

- [ARIES/Banner](#)
- [Time Clock](#)
- [Vista Plus](#)

### Training

- [Kuali Financial System](#)
- [Kuali Research \(KR\)](#)

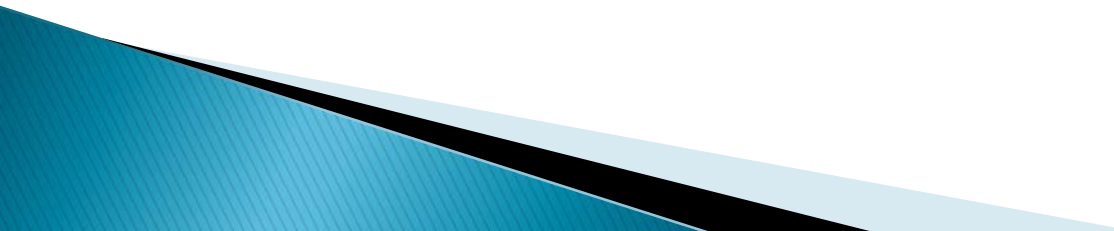
## Application Systems

- 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

- 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



- 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

## 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













Document Search 

[detailed search](#)

[clear saved searches](#)

Searches 

\* required field

|                                                                                                                  |                      |                                                                                                                                                                                                                                                             |   |
|------------------------------------------------------------------------------------------------------------------|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|
| Document Type:                                                                                                   | <input type="text"/> |    | ← |
| Initiator:                                                                                                       | <input type="text"/> |    |   |
| Document Id:                                                                                                     | <input type="text"/> |                                                                                                                                                                          |   |
| Date Created From:                                                                                               | <input type="text"/> |                                                                                       |   |
| Date Created To:                                                                                                 | <input type="text"/> |                                                                                       |   |
| Name this search (optional):                                                                                     | <input type="text"/> |                                                                                                                                                                          |   |
| <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> |                      |                                                                                                                                                                                                                                                             |   |

# 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)

# Document Search Screen

Document Search ? detailed search clear saved searches Searches ▼ \* required field

|                               |                                                                                             |  |  |
|-------------------------------|---------------------------------------------------------------------------------------------|--|--|
| Document Type:                | <input type="text" value="acct"/>                                                           |  |  |
| Initiator:                    | <input type="text"/>                                                                        |  |  |
| Document Id:                  | <input type="text"/>                                                                        |  |  |
| Date Created From:            | <input type="text" value="09/30/2019"/>                                                     |  |  |
| Date Created To:              | <input type="text"/>                                                                        |  |  |
| Document Description:         | <input type="text"/>                                                                        |  |  |
| Organization Document Number: | <input type="text"/>                                                                        |  |  |
| Chart Code:                   | <input type="text"/>                                                                        |  |  |
| Account Number:               | <input type="text"/>                                                                        |  |  |
| Search Result Type:           | <input checked="" type="radio"/> Document Specific Data <input type="radio"/> Workflow Data |  |  |
| Name this search (optional):  | <input type="text"/>                                                                        |  |  |

**Notice the screen changes.**

25 items retrieved, displaying all items.

| Document Id              | Status    | Document Description                     | Organization Document Number | Chart Code | Account Number | Route Log |
|--------------------------|-----------|------------------------------------------|------------------------------|------------|----------------|-----------|
| <a href="#">20627707</a> | PROCESSED | NEAT - CIRA Support to NESDIS Environ... |                              | CO         | 5310563        |           |
| <a href="#">20627706</a> | PROCESSED | ABI (CLP) CIRA Support for Research a... |                              | CO         | 5310551        |           |
| <a href="#">20627705</a> | PROCESSED | Sustainable Range Program ITAM Progra... |                              | CO         | 5309641        |           |
| <a href="#">20627704</a> | PROCESSED | 2019 CPG                                 |                              | CO         | 5391477        |           |
| <a href="#">20627703</a> | PROCESSED | 19CPG Thousand Cankers                   |                              | CO         | 5391478        |           |

# Document Search Screen

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.

|                                                                                                                  |                                                                                             |
|------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| 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:                                                                                              | <input checked="" type="radio"/> Document Specific Data <input type="radio"/> Workflow Data |
| Name this search (optional):                                                                                     |                                                                                             |
| <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> |                                                                                             |

Only 500 Results

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 |
|-------------------------|--------|------------------------------------------|------------------------------|------------|----------------|-----------|
| <a href="#">1675187</a> | FINAL  | Timed Power Cylinder Lube Oil Injection  |                              | CO         | 5356280        |           |
| <a href="#">1675186</a> | FINAL  | Quarnet Center at CSU Teacher #1         |                              | CO         | 5340290        |           |
| <a href="#">1675185</a> | FINAL  | Economics of Innovative Water Sharing wi |                              | CO         | 5301070        |           |
| <a href="#">1675184</a> | FINAL  | Estimating the Short and Long-term Econo |                              | CO         | 5301060        |           |
| <a href="#">1675179</a> | FINAL  | A Web Skin for the Four Corners Region   |                              | CO         | 5359010        |           |
| <a href="#">1675178</a> | FINAL  | 4-H National Mentoring Program           |                              | CO         | 5355050        |           |
| <a href="#">1675177</a> | FINAL  | Environmental Effects on Harbor Seal Mov |                              | CO         | 5350010        |           |
| <a href="#">1675176</a> | FINAL  | High Sensitivity, Molecular Contrast Mic |                              | CO         | 5348110        |           |
| <a href="#">1675175</a> | FINAL  | Quarnet Center at CSU Teacher #2         |                              | CO         | 5340300        |           |
| <a href="#">1675174</a> | FINAL  | A Novel Exnerimental + Modelinn Study of |                              | CO         | 5336580        |           |

# Document Search Screen

Document Search ? detailed search clear saved searches Searches ▼ \* required field







All ACCT documents containing 5355050 for 12 month period

**Narrow Search by using account number or changing date fields**

|                                      |                                                                                                            |
|--------------------------------------|------------------------------------------------------------------------------------------------------------|
| <b>Document Type:</b>                | acct <span>?</span>                                                                                        |
| <b>Initiator:</b>                    | <input type="text"/> <span>?</span>                                                                        |
| <b>Document Id:</b>                  | <input type="text"/> <span>?</span>                                                                        |
| <b>Date Created From:</b>            | 01/20/2011 <span>?</span>                                                                                  |
| <b>Date Created To:</b>              | 01/20/2012 <span>?</span>                                                                                  |
| <b>Document Description:</b>         | <input type="text"/> <span>?</span>                                                                        |
| <b>Organization Document Number:</b> | <input type="text"/> <span>?</span>                                                                        |
| <b>Chart Code:</b>                   | CO <span>?</span>                                                                                          |
| <b>Account Number:</b>               | 5355050 <span>?</span>                                                                                     |
| <b>Search Result Type:</b>           | <input checked="" type="radio"/> Document Specific Data <input type="radio"/> Workflow Data <span>?</span> |
| <b>Name this search (optional):</b>  | <input type="text"/> <span>?</span>                                                                        |

search clear cancel

6 items retrieved, displaying all items.

| Document Id             | Status | Document Description           | Organization Document Number | Chart Code | Account Number | Route Log                                                                             |
|-------------------------|--------|--------------------------------|------------------------------|------------|----------------|---------------------------------------------------------------------------------------|
| <a href="#">1675178</a> | FINAL  | 4-H National Mentoring Program |                              | CO         | 5355050        |    |
| <a href="#">1579459</a> | FINAL  | 4-H National Mentoring Program |                              | CO         | 5355050        |    |
| <a href="#">1452553</a> | FINAL  | 4-H National Mentoring Program |                              | CO         | 5355050        |   |
| <a href="#">1430266</a> | FINAL  | 4-H National Mentoring Program |                              | CO         | 5355050        |  |
| <a href="#">1222202</a> | FINAL  | 4-H National Mentoring Program |                              | CO         | 5355050        |  |
| <a href="#">1219156</a> | FINAL  | 4-H National Mentoring Program |                              | CO         | 5355050        |  |

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

# 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.

| <u>Document Id</u>      | <u>Status</u> | <u>Document Description</u>    | <u>Organization Document Number</u> | <u>Chart Code</u> | <u>Account Number</u> | <u>Route Log</u>                                                                    |
|-------------------------|---------------|--------------------------------|-------------------------------------|-------------------|-----------------------|-------------------------------------------------------------------------------------|
| <a href="#">1675178</a> | FINAL         | 4-H National Mentoring Program |                                     | CO                | 5355050               |  |
| <a href="#">1579459</a> | FINAL         | 4-H National Mentoring Program |                                     | CO                | 5355050               |  |
| <a href="#">1452553</a> | FINAL         | 4-H National Mentoring Program |                                     | CO                | 5355050               |  |
| <a href="#">1430266</a> | FINAL         | 4-H National Mentoring Program |                                     | CO                | 5355050               |  |
| <a href="#">1222202</a> | FINAL         | 4-H National Mentoring Program |                                     | CO                | 5355050               |  |
| <a href="#">1219156</a> | 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.

|                                                                                                                  |                                                                                             |                                                                                                                                                                                                                                                             |
|------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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:                                                                                                  | 5355050                                                                                     |                                                                                                                                                                          |
| Search Result Type:                                                                                              | <input checked="" type="radio"/> Document Specific Data <input type="radio"/> Workflow Data |                                                                                                                                                                          |
| Name this search (optional):                                                                                     | Acct Doc Search                                                                             |                                                                                       |
| <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> |                                                                                             |                                                                                                                                                                                                                                                             |

6 items retrieved, displaying all items.

| <u>Document Id</u> | <u>Status</u> | <u>Document Description</u>    | <u>Organization Document Number</u> | <u>Chart Code</u> | <u>Account Number</u> | <u>Route Log</u>                                                                      |
|--------------------|---------------|--------------------------------|-------------------------------------|-------------------|-----------------------|---------------------------------------------------------------------------------------|
| 1675178            | FINAL         | 4-H National Mentoring Program |                                     | CO                | 5355050               |  |



# Initiator (EID) Search

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

⚠ This is a test environment









Back Door ID L

Document Search ?

detailed search clear saved searches

Searches

\* required field



|                                                                                                                  |                      |                                                                                                                                                                             |
|------------------------------------------------------------------------------------------------------------------|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Document Type:                                                                                                   | <input type="text"/> |   ?   |
| Initiator:                                                                                                       | <input type="text"/> |   ? ← |
| Document Id:                                                                                                     | <input type="text"/> |  ?                                                                                       |
| Date Created From:                                                                                               | <input type="text"/> |  ?                                                                                       |
| Date Created To:                                                                                                 | <input type="text"/> |  ?                                                                                     |
| Name this search (optional):                                                                                     | <input type="text"/> |  ?                                                                                     |
| <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> |                      |                                                                                                                                                                             |

# Initiator (EID) Search













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

This is a test environment

Back Door ID L

Document Search  detailed search clear saved searches Searches 

\* required field

|                              |                      |                                                                                                                                                                                                                                                             |
|------------------------------|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Document Type:               | <input type="text"/> |    |
| Initiator:                   | <input type="text"/> |    |
| Document Id:                 | <input type="text"/> |                                                                                                                                                                          |
| Date Created From:           | <input type="text"/> |                                                                                       |
| Date Created To:             | <input type="text"/> |                                                                                   |
| Name this search (optional): | <input type="text"/> |                                                                                                                                                                        |

# Initiator (EID) Search

Click on return value next to the persons name.

This is a test environment

Back Door ID

## Person Lookup

\* required field

|                          |                                                                                          |
|--------------------------|------------------------------------------------------------------------------------------|
| Principal Name:          | <input type="text"/>                                                                     |
| Principal ID:            | <input type="text"/>                                                                     |
| Entity ID:               | <input type="text"/>                                                                     |
| First Name:              | <input type="text"/>                                                                     |
| Middle Name:             | <input type="text"/>                                                                     |
| Last Name:               | <input type="text" value="Leaming"/>                                                     |
| Email Address:           | <input type="text"/>                                                                     |
| Phone Number:            | <input type="text"/>                                                                     |
| Employee ID:             | <input type="text"/>                                                                     |
| Campus Code:             | <input type="text"/>                                                                     |
| Primary Department Code: | <input type="text"/>                                                                     |
| Employee Status Code:    | <input type="text"/>                                                                     |
| Employee Type Code:      | <input type="text"/>                                                                     |
| Active Indicator:        | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both |

One item retrieved.

| Return Value                 | Principal ID | Principal Name         | Name              | Entity ID | Campus Code | Primary Department Code | Employee ID |
|------------------------------|--------------|------------------------|-------------------|-----------|-------------|-------------------------|-------------|
| <a href="#">return_value</a> | 56624        | sleaming@colostate.edu | Leaming, Summer E | 39861     | MC          | CO-6003                 | 830190985   |

Export options: CSV | spreadsheet | XML

# Initiator (EID) Search

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

This is a test environment

Back Door ID

## Document Search

detailed search clear saved searches Searches

### Warnings for this Section:

- Too many results returned, displaying only the first 500. Please refine your search.

Too many results  
use dates and doc  
type to narrow  
your results

Document Type:

Initiator:

Document Id:


Date Created From: 01/20/2011

Date Created To: 01/20/2012

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             | Document Type        | Title                                       | Status | Initiator                 | Date Created        | Route L                                                                               |
|-------------------------|----------------------|---------------------------------------------|--------|---------------------------|---------------------|---------------------------------------------------------------------------------------|
| <a href="#">1675265</a> | Purchase Order Close | Purchase Order Close - Bookstore/whiteboard | FINAL  | <a href="#">USER, KFS</a> | 01/20/2012 08:49 PM |  |

# Initiator (EID) Search

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

This is a test environment Back Door ID

## Document Search

detailed search clear saved searches Searches

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

\* required field

|                               |                                                                                             |
|-------------------------------|---------------------------------------------------------------------------------------------|
| Document Type:                | bcct                                                                                        |
| Initiator:                    |                                                                                             |
| Document Id:                  |                                                                                             |
| Date Created From:            | 01/20/2011                                                                                  |
| Date Created To:              | 01/20/2012                                                                                  |
| Document Description:         |                                                                                             |
| Organization Document Number: |                                                                                             |
| Chart Code:                   |                                                                                             |
| Account Number:               |                                                                                             |
| Search Result Type:           | <input checked="" type="radio"/> Document Specific Data <input type="radio"/> Workflow Data |
| Name this search (optional):  |                                                                                             |

search clear cancel

} New Fields

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        |           |

# 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.

This is a test environment

Back Door ID

Document Search

detailed search

clear saved searches

Searches

\* required field

|                                                                                                                  |                                      |  |  |  |
|------------------------------------------------------------------------------------------------------------------|--------------------------------------|--|--|--|
| Document Type:                                                                                                   | <input type="text"/>                 |  |  |  |
| Initiator:                                                                                                       | <input type="text"/>                 |  |  |  |
| Document Id:                                                                                                     | <input type="text" value="1666655"/> |  |  |  |
| Date Created From:                                                                                               | <input type="text"/>                 |  |  |  |
| Date Created To:                                                                                                 | <input type="text"/>                 |  |  |  |
| Name this search (optional):                                                                                     | <input type="text"/>                 |  |  |  |
| <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> |                                      |  |  |  |

Just enter doc number and click search


One item retrieved.

| Document Id | Document Type | Title                                                   | Status | Initiator | Date Created        | Route Log |
|-------------|---------------|---------------------------------------------------------|--------|-----------|---------------------|-----------|
| 1666655     | Account       | Edit Account - Increasing the Adaptive Capacity of Mong | FINAL  | USER_KFS  | 01/13/2012 07:19 PM |           |


Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

# Date of Document Search







Allows you to search by a date range.

 This is a test environment

Back Door ID  Lo

Document Search  [detailed search](#) [clear saved searches](#) Searches

\* required field

|                              |                      |                                                                                     |
|------------------------------|----------------------|-------------------------------------------------------------------------------------|
| Document Type:               | <input type="text"/> |  |
| Initiator:                   | <input type="text"/> |  |
| Document Id:                 | <input type="text"/> |  |
| Date Created From:           | <input type="text"/> |  |
| Date Created To:             | <input type="text"/> |  |
| Name this search (optional): | <input type="text"/> |  |

search clear cancel

Search Day,  
Week, Month,  
Quarter or Year



# Date of Document Search

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

This is a test environment

Back Door ID

Document Search

detailed search clear saved searches Searches

Warnings for this Section:

- Too many results returned, displaying only the first 500. Please refine your search.

\* required field



Too many Results

Document Type:  ?

Initiator:  ?

Document Id:  ?

Date Created From: 07/01/2010 ?

Date Created To: 06/30/2011 ?

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 | Document Type        | Title                                         | Status | Initiator | Date Created        | Route Log |
|-------------|----------------------|-----------------------------------------------|--------|-----------|---------------------|-----------|
| 1392470     | Purchase Order Close | Purchase Order Close - 2011-05-27 LANGINK 01  | FINAL  | USER_KFS  | 06/30/2011 09:24 PM |           |
| 1392469     | Purchase Order Close | Purchase Order Close - 2011-06-29 LSHANAHA 01 | FINAL  | USER_KFS  | 06/30/2011 09:24 PM |           |
| 1392468     | Purchase Order Close | Purchase Order Close - 2011-06-29 LHOWARD 01  | FINAL  | USER_KFS  | 06/30/2011 09:24 PM |           |
| 1392467     | Purchase Order Close | Purchase Order Close - Prt-fr ppr - VWR       | FINAL  | USER_KFS  | 06/30/2011 09:24 PM |           |
| 1392466     | Purchase Order Close | Purchase Order Close - 2011-06-29 LJOHNSN 01  | FINAL  | USER_KFS  | 06/30/2011 09:24 PM |           |
| 1392465     | Purchase Order Close | Purchase Order Close - 2011-06-28 SBINDING 01 | FINAL  | USER_KFS  | 06/30/2011 09:24 PM |           |
| 1392464     | Purchase Order Close | Purchase Order Close - 2011-06-28 PEBZ 01     | FINAL  | USER_KFS  | 06/30/2011 09:24 PM |           |

# Date of Document Search

One day of production produces too many results.

This is a test environment

Back Door ID

Document Search

detailed search clear saved searches Searches

Warnings for this Section:

- Too many results returned, displaying only the first 500. Please refine your search.

\* required field

Too many results

Only one day of documents

Document search filters:

- Document Type:
- Initiator:
- Document Id:
- Date Created From: 01/24/2012
- Date Created To: 01/24/2012
- Name this search (optional):


Buttons: search clear cancel

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





































| Document Id | Document Type        | Title                                                | Status | Initiator | Date Created        | Route Log |
|-------------|----------------------|------------------------------------------------------|--------|-----------|---------------------|-----------|
| 1680807     | Purchase Order Close | Purchase Order Close - Scott                         | FINAL  | USER_KFS  | 01/24/2012 09:07 PM |           |
| 1680806     | Purchase Order Close | Purchase Order Close - Vialing supplies - WPS        | FINAL  | USER_KFS  | 01/24/2012 09:07 PM |           |
| 1680805     | Purchase Order Close | Purchase Order Close - Bookstore/whiteboard supplies | FINAL  | USER_KFS  | 01/24/2012 09:07 PM |           |

# Disbursement Voucher

# Custom Document Searches

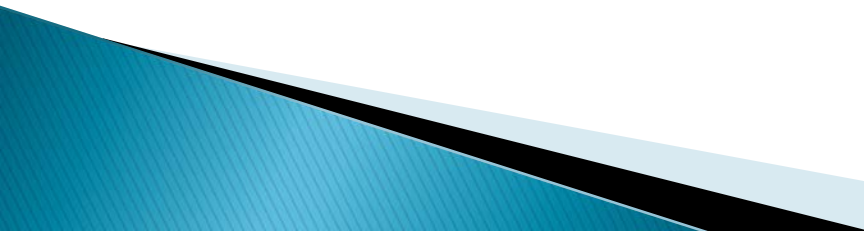
Document Search 

[detailed search](#)

|                               |                                                                                                                                                                                                                                                                                             |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Document Type:                | <input type="text" value="pv"/>    |
| Initiator:                    | <input type="text"/>               |
| Document Id:                  | <input type="text"/>                                                                                                                                                                                     |
| Date Created From:            | <input type="text"/>                                                                                                  |
| Date Created To:              | <input type="text"/>                                                                                                  |
| Document Description:         | <input type="text"/>                                                                                                                                                                                     |
| Organization Document Number: | <input type="text"/>                                                                                                                                                                                     |
| Payee ID:                     | <input type="text"/>                                                                                                                                                                                     |
| Payee Name:                   | <input type="text"/>                                                                                                                                                                                     |
| Payment Reason Code:          | <input type="text"/>               |
| PDP Extraction Date From:     | <input type="text"/>                                                                                                                                                                                     |
| PDP Extraction Date To:       | <input type="text"/>                                                                                                                                                                                     |
| PDP Paid Date From:           | <input type="text"/>                                                                                                                                                                                     |
| PDP Paid Date To:             | <input type="text"/>                                                                                                                                                                                     |
| PDP Cancellation Date From:   | <input type="text"/>                                                                                                                                                                                     |
| PDP Cancellation Date To:     | <input type="text"/>                                                                                                                                                                                     |
| Invoice Number:               | <input type="text"/>                                                                                                                                                                                     |
| Chart Code:                   | <input type="text"/>            |
| Organization Code:            | <input type="text"/>                                                                                              |
| Account Number:               | <input type="text"/>                                                                                              |
| Ledger Document Type:         | <input type="text"/>                                                                                                                                                                                   |
| Total Amount:                 | <input type="text"/>                                                                                                                                                                                   |
| Search Result Type:           | <input checked="" type="radio"/> Document Specific Data <input type="radio"/> Workflow Data                                                                                                            |
| Name this search (optional):  | <input type="text"/>                                                                                                                                                                                   |

# 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



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Action List Doc Search J

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# Custom Document Searches

## Payments Requests

Document Search 

|                                      |  |
|--------------------------------------|--|
| <b>Document Type:</b>                | PREQ                       |
| <b>Initiator:</b>                    | <input type="text"/>       |
| <b>Document Id:</b>                  | <input type="text"/>    |
| <b>Application Document Status:</b>  | Initiated<br>In Process<br>Cancelled In Process<br>Cancelled<br>Department-Approved                           |
| <b>Date Created From:</b>            | <input type="text"/>       |
| <b>Date Created To:</b>              | <input type="text"/>       |
| <b>Document Description:</b>         | <input type="text"/>    |
| <b>Organization Document Number:</b> | <input type="text"/>    |
| <b>Payment Request #:</b>            | <input type="text"/>    |
| <b>Invoice Number:</b>               | <input type="text"/>    |
| <b>Purchase Order #:</b>             | <input type="text"/>    |
| <b>Requisition #:</b>                | <input type="text"/>    |
| <b>Vendor #:</b>                     | <input type="text"/>       |
| <b>PO Chart Code:</b>                | <input type="text"/>       |
| <b>PO Organization Code:</b>         | <input type="text"/>   |
| <b>Process Campus:</b>               | <input type="text"/>   |
| <b>Customer #:</b>                   | <input type="text"/>    |
| <b>Invoice Date From:</b>            | <input type="text"/>   |
| <b>Invoice Date To:</b>              | <input type="text"/>   |
| <b>Pay Date From:</b>                | <input type="text"/>   |
| <b>Pay Date To:</b>                  | <input type="text"/>   |
| <b>AP Processed Date From:</b>       | <input type="text"/>   |
| <b>AP Processed Date To:</b>         | <input type="text"/>   |
| <b>Extracted:</b>                    | <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both                    |
| <b>Hold:</b>                         | <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both                    |



# 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.***

# Purchase Order

# Custom Document Searches

## Purchase Orders

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# Custom Document Searches

## Purchase Orders

Document Search ? detailed search clear saved searches

|                                             |                                                                                                                                                                                                                                        |
|---------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Document Type:                              | PO <span>?</span>                                                                                                                                                                                                                      |
| Initiator:                                  | <span>?</span>                                                                                                                                                                                                                         |
| Document Id:                                | <span>?</span>                                                                                                                                                                                                                         |
| Application Document Status:                | <div style="border: 1px solid gray; padding: 2px;">INCOMPLETE STATUSES<br/>- In Process<br/>- Awaiting Fiscal Officer Review<br/>- Awaiting New Unordered Item Review<br/>- Disapproved New Unordered Item Review <span>?</span></div> |
| Date Created From:                          | <span>?</span>                                                                                                                                                                                                                         |
| Date Created To:                            | <span>?</span>                                                                                                                                                                                                                         |
| Document Description:                       | <span>?</span>                                                                                                                                                                                                                         |
| Organization Document Number:               | <span>?</span>                                                                                                                                                                                                                         |
| Purchase Order #:                           | <span>?</span>                                                                                                                                                                                                                         |
| Requisition #:                              | <span>?</span>                                                                                                                                                                                                                         |
| Vendor #:                                   | <span>?</span>                                                                                                                                                                                                                         |
| Purchase Order Chart Code:                  | <span>?</span>                                                                                                                                                                                                                         |
| Purchase Order Organization Code:           | <span>?</span>                                                                                                                                                                                                                         |
| Requestor Name:                             | <span>?</span>                                                                                                                                                                                                                         |
| Assigned To User:                           | <span>?</span>                                                                                                                                                                                                                         |
| Delivery Campus:                            | <span>?</span>                                                                                                                                                                                                                         |
| Contract Manager:                           | <span>?</span>                                                                                                                                                                                                                         |
| Previous Purchase Order #:                  | <span>?</span>                                                                                                                                                                                                                         |
| Purchase Order Last Transmit Date From:     | <span>?</span>                                                                                                                                                                                                                         |
| Purchase Order Last Transmit Date To:       | <span>?</span>                                                                                                                                                                                                                         |
| Date Required From:                         | <span>?</span>                                                                                                                                                                                                                         |
| Date Required To:                           | <span>?</span>                                                                                                                                                                                                                         |
| Date Required Reason:                       | <span>?</span>                                                                                                                                                                                                                         |
| Receiving Required:                         | <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both <span>?</span>                                                                                                                                |
| Payment Request Positive Approval Required: | <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both <span>?</span>                                                                                                                                |

# 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

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# Custom Document Searches

## Receiving

Document Search  [detailed search](#) [clear saved sea](#)

|                               |  |
|-------------------------------|--|
| Document Type:                | RCV    |
| Initiator:                    | <input type="text"/>     |
| Document Id:                  | <input type="text"/>    |
| Date Created From:            | <input type="text"/>     |
| Date Created To:              | <input type="text"/>     |
| Document Description:         | <input type="text"/>    |
| Organization Document Number: | <input type="text"/>    |
| Vendor #:                     | <input type="text"/>     |
| Purchase Order #:             | <input type="text"/>    |
| Bill Of Lading #:             | <input type="text"/>    |
| Packing Slip #:               | <input type="text"/>    |
| Reference #:                  | <input type="text"/>    |
| Carrier:                      | <input type="text"/>    |
| Search Result Type:           | <input checked="" type="radio"/> Document Specific Data <input type="radio"/> Workflow Data   |
| Name this search (optional):  | <input type="text"/>    |



# 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



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# Custom Document Searches

## Requisitions

Document Search ? detailed search clear saved searches

|                                |                                                                                                                                                                                                                   |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Document Type:                 | REQS <span>?</span>                                                                                                                                                                                               |
| Initiator:                     | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Document Id:                   | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Application Document Status:   | <div style="border: 1px solid gray; padding: 2px;">Awaiting Content Approval<br/>Disapproved Content<br/>Awaiting Accounting Lines<br/>Disapproved Accounting Lines<br/>Awaiting Sub Account</div> <span>?</span> |
| Date Created From:             | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Date Created To:               | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Document Description:          | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Organization Document Number:  | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Requisition #:                 | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Vendor #:                      | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Requisition Chart Code:        | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Requisition Organization Code: | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Requestor Name:                | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Delivery Campus:               | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Delivery To:                   | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Reference 1:                   | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Reference 2:                   | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Reference 3:                   | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Chart Code:                    | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Organization Code:             | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Account Number:                | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Ledger Document Type:          | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Total Amount:                  | <input type="text"/> <span>?</span>                                                                                                                                                                               |
| Search Result Type:            | <input checked="" type="radio"/> Document Specific Data <input type="radio"/> Workflow Data <span>?</span>                                                                                                        |
| Name this search (optional):   | <input type="text"/> <span>?</span>                                                                                                                                                                               |

# 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

???



Contact your Campus Service Representative with Quali questions

Kris King

491-6752

Publina Meldrum

491-4148

Summer Leaming

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