

CIS Document Inquiries & Searches

Last Updated March 17, 2006

Document Searches (Queries)

Document searches can be done from any of the list screens. If you know the document # and don't want to scroll through the screen use the QUERY function keys to initiate a search. This can be done on these screens:

- Act on Pending Documents
- Document Available for Approval
- Document Available for Canceling
- Printing
- Receiving
- Batch Review

Press F11 or the Enter Query  key (1st icon that has a question mark)
(Screen goes blank)

Enter document #

Press Ctrl-F11 or the Press Execute Query key (2nd icon, a red check mark), only that document is displayed



Any field you can TAB to can be used to search the database. The % sign is the wildcard.

Example 1:

Go to Financial, Documents, Inquire/Print/Report on Documents/Print Documents.

On the Duplicate Order/File Copy print screen documents are in order from newest document to oldest document.

To display all requisitions for a certain vendor,



1. Click on the REQ tab
2. Press F11 or the Enter Query  key (screen will go blank)
3. Click into the last field of the first line and enter a portion of the vendor name and a %.
4. Press Ctrl-F11 or the Press Execute Query  key

Only requisitions to that vendor are displayed.

Example 2:

Go to Financial, Documents, Work on Existing, Act on Pending screen.

All documents from all users in your department appear on this screen.

1. To display only your AFE's, note how your name is displayed
2. Press F11 or the Enter Query  key (screen will go blank)
3. Tab to the prepared by field - Input your name
4. Press Ctrl-F11 or the Press Execute Query  key

Only your documents are displayed.

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Inquiry– AFEs & REQs

Go to Financial, Documents, Inquiry/Print..., AFE/REQ Document Inquiry

CAMPUS INFORMATION SYSTEM - [DPO/REQ Document Inquiry]

Action Edit Block Field Record Query Window Help

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AFE/REQ Search Criteria

Document Number:

Account #:

Date Created: to

Dept #:

Ordered By:

Prepared By:

Deliver To:

Vendor Name:

Inquire about

<input type="checkbox"/> Accounts Payable Activity	<input type="checkbox"/> Approvals Pending	<input type="checkbox"/> Document Status
<input type="checkbox"/> Approval History	<input type="checkbox"/> Document	<input type="checkbox"/> Print File Copy
	<input type="checkbox"/> Document Comments	<input type="checkbox"/> Receiving

Process Selection(s) Exit

From this screen, you can inquire on:

Accounts Payable Activity – see invoice and check numbers and dates for AFEs

Press the NEXT INVOICE button to page through each invoice (Please refer to the **Department Help for FRS Screens** handout for a better way to research A/P activity.)

Approval History – see who approved a document and when

Click on each line item to view the history for that line

Approvals Pending – see a listing of people who can approve a document

Click on each line item to view the pending approvers for that line

Document – see a copy of the document

Document Comments – see comments or add comments to a document

To add a comment, start a new line

Document Status – see the current status of a document


Print File Copy of a document

Receiving – see receiving that has been recorded. Click on each line item to view receiving for that line

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Search Criteria

- **To search by document #, account # or department #:** Input the number or a portion of the number.
- **To search by document creation date:** Input a date range in the format mm/dd/yy or mm/dd/yyyy or use the LIST key  to select your date range from the calendar.
- **To search by ordered by name, prepared by name or deliver to name:** Input a portion of the person's last name. Names are stored on CIS in the format lastname,firstname. To search for Mary Smith's documents input SMITH or SMITH,M or SMITH%.
- **To search by vendor name:** Input a portion of the vendor's name. If you are unsure of the exact vendor name, use the % sign as a wildcard. (For example, you know that Valley is part of the vendor name, but where? Input %VALLEY. All vendors whose name has Valley as a portion of their name will be displayed. If you input VALLEY, only vendors whose name starts with Valley would be displayed.)

Document Copy

Document creators have the ability to copy a previously created document, to use as a base for a newly created document. All information except for comments is copied to the new document. The document copy menu is found at: Financial, Documents, Create Documents, Document Copy.

Input the document # to copy

Click "Copy Document"

The system takes you to page 1 of the document creation screen. Continue creating the document as normal; add/delete/change data as necessary.

Document Cancel

From Financial, Documents, Work on Existing, REQ/AFE Documents Available to Cancel. A list of documents is presented. Click on the document to cancel, enter a reason, and click "Cancel Document". An "Are You Sure" box appears, click YES and the document is cancelled. If a document is not on the list it has already been cancelled or has been transferred to FRS/Accounts Payable and you cannot cancel it in CIS.

**NOTIFY ACCOUNTS PAYABLE VIA EMAIL IF YOU HAVE CANCELLED AN AFE.
NOTIFY PURCHASING VIA EMAIL IF YOU HAVE CANCELLED A REQUISITION.**