

# Kuali Financial System (KFS)

## Document Search

### October, 2009

#### Doc Search

- The search screen initially defaults to a basic search. You may switch between the basic search and detailed search by clicking the **Basic Search** or **Detailed Search** hyperlink.



- The basic search is the best option if you are searching by document number.
- The detailed search screen gives you more options for search criteria. The detailed search is the best option when you don't know the document number, or you want to search for a group of documents.

#### Named Search

- If you frequently search using the same criteria, you can name a set of search criteria. The system saves your search as a named search. When you later click **search**, the system displays a list of all named searches you have created in the **Searches** list.

Example of a Named Search:

1. Review a listing of all documents you created that are still in process (enroute) & name this search.

Click on:



And then detailed search on the right side of the document lookup.

## Document Lookup ?



Input your ename in the initiator field, with a status of enroute.  
Add a description in the "Name this search" field.  
Press search.

Document Lookup ? basic search non-superuser search clear saved searches Searches

Searches  
-----  
-Named Search  
my enroute  
-----  
-Recent Search

Initiator:

Approver:

Document/Notification Id:

Application Document/Notification Id:

Date Modified From:

Date Modified To:

Date Finalized From:

Date Finalized To:

Type:

Viewer:

Workgroup Viewer:

Status:

Date Created From:

Date Created To:

Date Approved From:

Date Approved To:

Title:

Name this search (optional):

Modifications to this search could include leaving the status field blank to see a listing of all documents you created; or adding a date range in the date created from/to fields.

2. Search for all PO transactions within a department.  
This search takes some time to build, but worth the effort!

Click on:



And then detailed search on the right side of the document lookup.

## Document Lookup



- First, search from the type field (click the icon). Input PO in the name field and press search. Click return value next to PO (Purchase Order line). You will be returned to the document lookup window and "PO" should appear to the right of the Type field.
- Second, input your department number in the organization code field and press search.

## Document Lookup

### Warnings for this Section:

- NOTE: Do not disclose purchase order numbers to vendors unless the status of the order is Open or Closed.

<b>Initiator:</b>	<input type="text"/>	
<b>Approver:</b>	<input type="text"/>	
<b>Document/Notification Id:</b>	<input type="text"/>	
<b>Application Document/Notification Id:</b>	<input type="text"/>	
<b>Date Modified From:</b>	<input type="text"/>	
<b>Date Modified To:</b>	<input type="text"/>	
<b>Date Finalized From:</b>	<input type="text"/>	
<b>Date Finalized To:</b>	<input type="text"/>	
<b>Type:</b>	PO	
<b>Return Current Documents Only:</b>	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both	
<b>Chart Code:</b>	<input type="text"/>	
<b>Account Number:</b>	<input type="text"/>	
<b>Organization Code:</b>	6003	

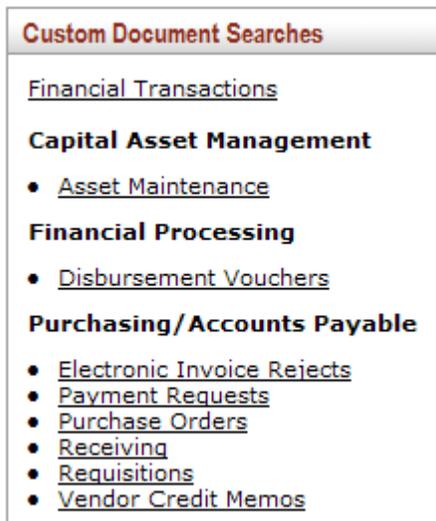
Common Document Type codes:

Account	ACCT	Internal Billing	IB
Adjustment Voucher	AV	Internal Order	IO
Advance Deposit	AD	Payment Request	PREQ
Budget Adjustment	BA	Pre-Encumbrance	PE
Cash Receipt	CR	Procurement Card	PCDO
Disbursement Voucher	DV	Transfer of Funds	TF
Distribution of Income/Expense	DI	Work Order Authorization	WOA
General Error Correction	GEC		

Modifications to this search could include searching on any of the other document types; or adding a date range in the date created from/to fields.

## **Document Specific Searches**

The document specific searches are designed to assist you with additional search criteria for Disbursement Vouchers, Payment Requests (invoices), Purchase Orders, Requisitions and Credit Memo's. These searches are available from the **main menu; top middle of the screen** in the Custom Document Searches Menu Group.



These searches contain additional field's specific to that document.

The document specific searches may be named, as noted above, so that you may reuse the same search criteria at a later date.

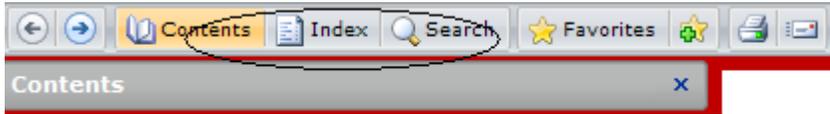
Each search gives you options for two search results types.

- *Document Specific Data*: Retrieve field specific to the document in your search results.
- *Workflow Data*: Retrieve field specific to the workflow status of the document in your search results.

In depth detail on each of the document specific searches can be found at the online help:

<http://kfsprod.is.colostate.edu:8482/kfs-prd/static/help/default.htm?>

Once in the online help, click on the index toward the top left of the screen.



In the Look for box input “Purchasing/Accounts Payable Document Searches”.

## **FRS Purchase Order Documents**

To search for an FRS Purchase Order that converted to KFS, from the Purchase Order lookup screen, input the FRS Purchase Order number in the Organization Document Number field.

**Document Lookup** ? detailed search superuser search

**Warnings for this Section:**

- NOTE: Do not disclose purchase order numbers to vendors unless the status of the order is Open or Closed

<b>Type:</b>	PO
<b>Initiator:</b>	<input type="text"/>
<b>Document/Notification Id:</b>	<input type="text"/>
<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>	S034496

**Contact** Your Campus Services representative:

<http://busfin.colostate.edu/cs.aspx>

