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:
   ![doc search]

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

   **Document Lookup**

   Input your name in the initiator field, with a status of enroute.
   Add a description in the “Name this search” field.
   Press search.

   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:
   
   ![Document Lookup](doc search)

   And then detailed search on the right side of the 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.

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**Warnings for this Section:**
- NOTE: Do not disclose purchase order numbers to vendors unless the status of the order is Open or Closed.
Common Document Type codes:

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Code</th>
<th>Description</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>ACCT</td>
<td>Internal Billing</td>
<td>IB</td>
</tr>
<tr>
<td>Adjustment Voucher</td>
<td>AV</td>
<td>Internal Order</td>
<td>IO</td>
</tr>
<tr>
<td>Advance Deposit</td>
<td>AD</td>
<td>Payment Request</td>
<td>PREQ</td>
</tr>
<tr>
<td>Budget Adjustment</td>
<td>BA</td>
<td>Pre-Encumbrance</td>
<td>PE</td>
</tr>
<tr>
<td>Cash Receipt</td>
<td>CR</td>
<td>Procurement Card</td>
<td>PCDO</td>
</tr>
<tr>
<td>Disbursement Voucher</td>
<td>DV</td>
<td>Transfer of Funds</td>
<td>TF</td>
</tr>
<tr>
<td>Distribution of Income/Expense</td>
<td>DI</td>
<td>Work Order Authorization</td>
<td>WOA</td>
</tr>
<tr>
<td>General Error Correction</td>
<td>GEC</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

**Custom Document Searches**

- Financial Transactions
  - Capital Asset Management
    - Asset Maintenance
  - Financial Processing
    - Disbursement Vouchers
  - Purchasing/Accounts Payable
    - Electronic Invoice Rejects
    - Payment Requests
    - Purchase Orders
    - Receiving
    - Requisitions
    - Vendor Credit Memos

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?](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.

**Contact**

Your Campus Services representative: [http://busfin.colostate.edu/cs.aspx](http://busfin.colostate.edu/cs.aspx)