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QUICK START GUIDE: LOOK UP PCDO EDOCS (PALCARD REVIEW DOCUMENTS)

Summary: The document search tool in KFS is the only way to lookup PALCard review documents (known as a PCDO). Otherwise, PCDOs will only appear in a user's action list when an action is needed by them.

Replacement: The KFS document search for PCDO eDocs (part of the Financial Processing Module) replaces the search section of TOEP PALCard Charge Review in Zeus.

Steps	What you need to do	How to do it					
1	Access KFS via ZOTPortal	 Use your UCInetID and password to log in to <u>https://portal.uci.edu/</u> Press the Faculty and Staff tab and then select the KFS tab 					
2	Access Document Search	 Navigate to the KFS Tools portlet Select Doc Search 					
4	Enter Document Type in the Basic Document Lookup	1. Enter PCDO in (document) Type field action list doc search Document Lookup ? Type: PCDO S Initiator: Document/Notification Id: Date Created From: Date Created To: Name this search (optional): Search Clear Cancel					
		Note: Users can only do a basic search from at this point for an eDoc (based on Doc # & date range)2. Press the search button to display additional fields					

5	Search	1.	Enter desired search criteria (in the expanded search field criteria)					
		_	Туре:	pcdo	۹			
			Initiator:		9			
			Document/Notification Id:					
			Date Created From:	04/05/2013				
			Date Created To:					
			Document Description:					
		-	Organization Document Number:					
		-	Transaction ID Number:					
		-	Procurement Card Number Last Four:					
		-	Transaction Date From:					
		-	Transaction Date To:					
		-	Cardholder Name:					
		-	Cardholder Alternate Name:	*fichor*				
		-	Group Name:	lisiiei				
		-	Chart Code:					
		-	Account Number					
		-						
		-	organization code:	•				
		-	Leager Document Type:					
			Search Result Type	Degument Speci	fie Data			
			Name this search (optional):	O Document spec		/ Worknow Data		
			search clear cancel					
		Note: Remember to change/delete the pre-filled Date Created From (if needed). Users can search some fields using only partial information by placing an asterisk (*) before and after the text portion of the search criteria						
		OR See	e Alternate #5 below					
*Alternate 5	Access the Detailed Search link	Select t button t search	he Detailed Search to open up more field criteria	ion list) 🕞 doc so ument Lookup	earch detaile	d search		