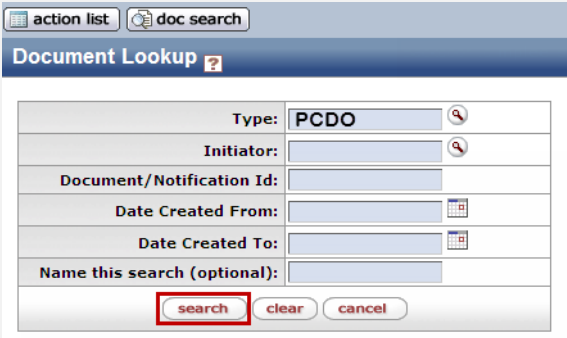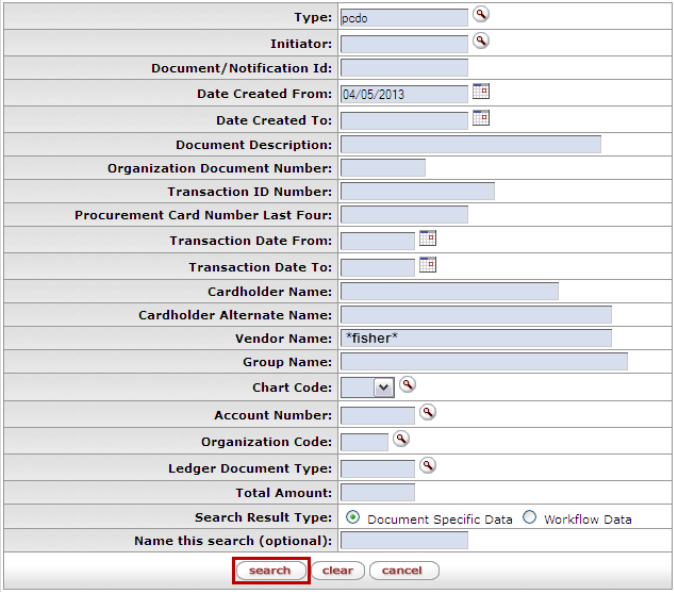# KUALI FINANCIAL SYSTEM
UNIVERSITY *of* CALIFORNIA · IRVINE

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	1. Use your UCInetID and password to log in to https://portal.uci.edu/ 2. Press the **Faculty and Staff** tab and then select the **KFS** tab
2	Access Document Search	1. Navigate to the **KFS Tools** portlet 2. Select **Doc Search**
4	Enter Document Type in the Basic Document Lookup	1. Enter PCDO in (document) Type field 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)

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 Alternate #5 below

*Alternate 5	Access the Detailed Search link	Select the Detailed Search button to open up more search field criteria