Searching for documents in EBS

If you have the edoc # - **Slide 2**

When you don't have the edoc #
- Find & save search for **pcards** - **Slide 3 & 4**
- Find & save search for **reimbursements** - **Slide 5 & 6**
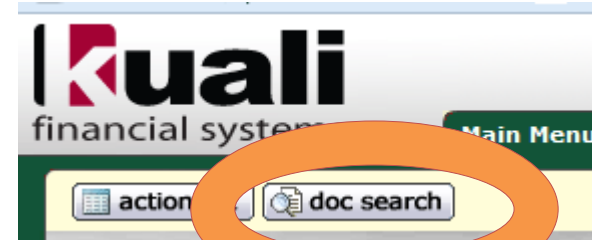
How to use your saved searches- **Slide 7 & 8**

If after attempting these searches and you are unsuccessful finding what you need, please contact a member of the business office Transaction Assistant Team and someone will be happy to help you.
http://www.canr.msu.edu/od/business_office/

Document Search **(when you know the edoc #)**

- Used to find edocs that are not in your action list

- Click "DOC SEARCH" in upper left hand corner

- Enter the edoc # in the **Document Id** field

- Hit the search button

- Click on edoc # to open the edoc

Kuali financial system   Main Menu

action   doc search

Document Type:	
Initiator:	
Document Id:	
Date Created From:	
Date Created To:	
Name this search (optional):	

search   clear   cancel

Document Id	Status	Document Description	Organization Document
11792420	FINAL	Kolasa, Kelli 11.18.16	

Saved Searches – Pcard Edocs

Used to find your pcard edocs

- Click doc search

- Enter **PCDO** in Document type field

- Hit tab- this will expand and give you more options to search

- Enter your **netID** (everything <u>before</u> @msu.edu) in the "Procurement Cardholder MSU NetID" field

- To save this search and use again in the future, enter Pcards in the "Name this search (optional)" field. If you don't enter anything in here, it won't save the search.

- Click Search

- Scroll through until you find the edoc you are looking for. Click on the edoc # to open and review the document.

- To use this in the future, when you click doc search, you'll see a drop down field in the upper right corner. Expand the drop down and click on the search you want to run.

Document Type:	pcdo
Initiator:	
Document Id:	
Date Created From:	
Date Created To:	
Document Description:	
Organization Document Number:	
Disputed with Bank:	○ ○ No ◉ Both
Procurement Cardholder MSU Net:	kolasa
Chart Code:	
Account Number:	
Organization Code:	
Responsibility Center Code:	
Reports to Organization:	
Ledger Document Type:	
Total Amount:	
Search Result Type:	Specific Data ○ Workflow Data
Name this search (optional):	Kelli_PCard transactions

search   clear   cancel

Saved Searches – Reimbursements

Used to find your reimbursement edocs

- Click doc search

- Enter **DV** in Document type field

- Hit tab- this will expand and give you more options to search

- Enter your **Last Name, First Name** as it is listed with the university

- To save this search and use again in the future, enter Your Name_Reimbursements in the "Name this search (optional)" field. If you don't enter anything in here, it won't save the search.

- Click Search

- Scroll through until you find the edoc you are looking for. Click on the edoc # to open and review the document.

- To use this in the future, when you click doc search, you'll see a drop down field in the upper right corner. Expand the drop down and click on the search you want to run.

Document Type	dv
Initiator:	
Document Id:	
Date Created From:	
Date Created To:	
Document Description:	
Organization Document Number:	
Payee ID:	
Payee Name	kolasa, kelli
Payment Reason Code:	
PDP Extraction Date From:	
PDP Extraction Date To:	
PDP Paid Date From:	
PDP Paid Date To:	
PDP Cancelation Date From:	
PDP Cancelation Date To:	
Chart Code:	MS
Account Number:	
Organization Code:	
Responsibility Center Code:	
Reports to Organization:	
Ledger Document Type:	
Total Amount:	
Search Result Type:	○ Document Specific Data ○ Workflow Data
Name this search (optional)	Kelli_Reimbursements

search   clear

How to use your saved searches

- When you login to the financial system, click on doc search

- In the upper right hand corner, you'll see a drop down menu.

- Click on the arrow and find the search you are looking for.

*Be careful- when you click "clear saved searches" you'll have to start over.