VO Document Searches by Vendor Name   Bill Cahill 294-5124

If you want to search for VO Documents for a particular vendor, follow these instructions.

1. Click on the **uBusiness** tab in AccessPlus.
2. Click on the link for the **Kuali Action List**.
3. Click on the **doc search** button in the top left of the screen.
4. Click on the **detailed search** button in the top center of the screen.
5. In the **Title** field near the bottom of the screen, enter the exact vendor name with an asterisk on both sides of the vendor name. (This field is not case-sensitive.) You can also try a fragment of the vendor name surrounded by asterisks. Sometimes a fragment works better, especially for longer vendor names. For example, *FARMER BROTHERS COFFEE* yields no results, but *FARMER BROTHERS COF* does, as only 20 characters are allowed for the vendor name.
6. Click the **search** button.

Date Created From:	04/11/2012
Date Created To:	
Date Approved From:	
Date Approved To:	
Title:	*farmer brothers cof*
Name this search (optional):	

<center>search   clear   cancel</center>

Refining Your Search:

1. The default search is for a **Date Created From** starting one month ago. (The "Date Created" refers to the date the Accounting Office attached an image to the VO Document.) For example, if you did a search on 5/11/2012, you would only have gotten the results for those VO Documents created 4/11/2012 forward. However, you can alter the period for the search by keying in a different **Date Created From** or **Date Created To**.
2. Approvers in the funding areas may find it more meaningful to use the **Date Approved From** and **Date Approved To** date ranges, which reflect the actions of their areas, rather than those of the Accounting Office. For best results when using the **Date Approved From** and **Date Approved To** date ranges, please clear the **Date Created From** or **Date Created To** ranges first.
3. The default search (see #1 above) includes all routing statuses. (The most common routing statuses are ENROUTE and FINAL.) Clicking on the **Route Status** header allows you to alphabetically sort the different route statuses.

Document/Notification Id	Type	Title	Route Status	Initiator	Date Created	Route Log
51068	VOucher on PO	VOucher on PO - FARNER BOCKEN CO /C0 22595 35/NEG/	DISAPPROVED	FAUSCH NANCY S	03/05/2012 12:06 PM	
48161	VOucher on PO	VOucher on PO - FARNER BOCKEN CO /C0 22595 35/NEG/	DISAPPROVED	FAUSCH NANCY S	02/23/2012 08:47 AM	
41681	VOucher on PO	VOucher on PO - FARNER BOCKEN CO /C0 22595 35/NEG/	DISAPPROVED	FAUSCH NANCY S	02/02/2012 11:02 AM	
71274	VOucher on PO	VOucher on PO - FARNER BOCKEN CO /C0 22595 35/NEG/	FINAL	FAUSCH NANCY S	05/11/2012 09:49 AM	

4. You can refine the search to select one or more of the statuses. To select more than one status, hold down the CTRL key while selecting multiple statuses with your mouse. You can also select multiple statuses by clicking a heading such as **Successful Statuses**, which includes all FINAL, PROCESSED, and APPROVED statuses.

VO Document Searches by Approver

To perform a search for a particular approver, follow these instructions.

1. Click on the **uBusiness** tab in AccessPlus.
2. Click on the link for the **Kuali Action List**.
3. Click on the **doc search** button in the top left of the screen.
4. Click on the **detailed search** button in the top center of the screen.
5. Go to the **Approver** field towards the top of the screen, and enter the user name of a particular approver. If you do not know the user name, you can use the magnifying glass to the right of the **Approver** field to activate the Search function.

If you enter at least the **Last Name**, you can click the **search** button to see the possible matches.

	Principal Name:	
	Principal ID:	
	First Name:	
	Middle Name:	
	Last Name:	Cahill
	Primary Department Code:	
	Active Indicator:	● Yes ○ No ○ Both

search   clear   cancel

Click the **return value** link next to the name you would like to choose.

4 items found. Please refine your search criteria to narrow down your search.

4 items retrieved, displaying all items.

Return Value	Principal Name	Name	Campus Code	Primary Department Code
return value	bpcahil	CAHILL WILLIAM PAUL	IS	IS-12500
return value	ccahill	CAHILL CHARLES P	IS	IS-11533
return value	jcahill	CAHILL JAMES F	IS	IS-00001
return value	mlcahill	CAHILL MACKENZIE LEE	IS	IS-00001

The **Approver** field now reflects the user name of the approver you selected.

Initiator:		🔍
Approver:	bpcahil	🔍
Document/Notification Id:		
Application Document/Notification Id:		

Your search results will be limited to 500 items, so you can use the information on the previous two pages to refine your search if necessary.

Other VO Document Notes

1. Before returning a VO Document to Accounts Payable, please add a note explaining why it's being returned.
2. When you type a note in the Note Text box, you must click the Add button or it will not be saved.
3. When the Funding Lines show all 9s for the fund account number, and you need to return the VO Document to Accounts Payable, you no longer have to type in a valid fund account number before returning it.
4. If a Note Text is added and the recipient does not open it or click Acknowledge, the status of the VO Document will remain stuck at Processed, rather than Final. However, this will not hold up the payment.
5. If a VO Document has a Hold Indicator checked, it does not prevent another approver in your area from clicking the Approve button. As a Phase II project, we expect to add a warning message that the approver is overriding a Hold indicator, although this will be sometime after July 2013.