Job Aid: Using Lookup and Search Features

**Purpose:** The purpose of this job aid is to describe the Lookup and Search features in KFS. **Lookup** and **Search** are used when you are not sure of the exact information that is needed in a transaction. In addition, you can use the **Search** feature to generate lists, such as **Object Codes**, which can be downloaded. In this job aid, you will learn about:

- Doc Search
- Wildcard
- Looking Glass
- Dictionary
- Common Lookup and Search Features
- Scenario 1: Search for an Account Name
- Scenario 2: Find an Organization Code
- Scenario 3: Lookup an Object Code Name

**Doc Search**

Multiple ways exist to search for a document after clicking the **Doc Search** button in the **Main Menu**:

<table>
<thead>
<tr>
<th>Search Type</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Type</td>
<td>Search by Document Type (DV,GEC, etc.)</td>
</tr>
<tr>
<td>Initiator</td>
<td>Search by entering the document’s creator</td>
</tr>
<tr>
<td>Document/Id</td>
<td>Search by unique computer generated number</td>
</tr>
<tr>
<td>From/To</td>
<td>Search for documents between a specific date range</td>
</tr>
</tbody>
</table>

**Note:** For more information, refer to the **Using Doc Search in KFS Job Aid.**

**Wildcard**

The **Wildcard** is used to search for values when you do not know the exact name of the value:

- Used in free-text fields (fields without a looking glass)
- An asterisk (*) or percentage (%) can be used as the wildcard
- The * or % can be used before and/or after the character string for all results that contain that name
- Best practice is to use the Wildcard (*) before and after a character string (word, phrase, numbers, etc.)

This table provides wildcard search examples and expected results.

<table>
<thead>
<tr>
<th>Search – Alpha or Numeric</th>
<th>Expected Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>* After letters</td>
<td>All vendors beginning with MC*</td>
</tr>
<tr>
<td>Example: MC* to find vendors</td>
<td></td>
</tr>
<tr>
<td>* Before numbers</td>
<td>All account numbers ending with *1205</td>
</tr>
<tr>
<td>Example: “1205”</td>
<td></td>
</tr>
<tr>
<td>* Before and after a word”</td>
<td>All vendors that have the word <em>TRAVEL</em> in the name</td>
</tr>
</tbody>
</table>
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Looking Glass
The Looking Glass, denoted by ☰, is used to conduct a search.

• Used when you do not know a value needed to complete a field
• Opens a tab and screen for you to use to type search criteria
• Click on Return Value to populate the selected value in the open document

Dictionary
The Dictionary, denoted by 📖, is used to verify a value.

• Use when you are fairly sure you know the value needed to complete a field, but want to double-check
• Provides details about a value

For example:
1. Enter Object Type Code “IN” then click Dictionary.
2. Click Search.
3. View the pop-up display then click Close to return to your search document.
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Common Lookup and Search Features
The next section of this guide walks you through 3 common **Lookup** and **Search** scenarios:

- Account Name
- Organization Code
- Object Code

Scenario 1: Search for an Account Name

1. Select **Account** from the **Chart of Accounts** in the Lookup and Maintenance box.

2. Click **Account Number** in **Account Lookup** and type the selected account number in the field.

3. Click **Search** to view results.

*Note:* Column four displays the **Account Name**.

![Image of Chart of Accounts and Account Lookup features]
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Scenario 2: Find an Organization Code

1. Select **Organization** from the **Chart of Accounts** in the **Lookup and Maintenance** box.

![Lookup and Maintenance](image1)

2. Type the beginning letters of your **Organization** followed by a wild card (either an asterisk * or percentage symbol %) on the **Organization Lookup** screen.

![Organization Lookup](image2)

3. Click **Search** to view results.

*Note*: Column three displays the **Organization Code**.

![Organization Code](image3)
Scenario 3: Lookup an Object Code Name

1. Select **Object Code** from the **Chart of Accounts** in the Lookup and Maintenance box.

2. Type the **Object Code Number** or part of the number followed by a wild card (either an asterisk * or percentage symbol %).

3. Click **Search** to view the results.

**Note:** Column five displays the **Object Code Name**.