

**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.

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| 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)   1. 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 |