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# FIN How-to: Saving Journal Entry Searches [1]

The Saved Searches feature makes it easier for you to find journal entries.

You might save a search to quickly find journal entries:

- ?created by a specific user.
- not posted for your source code.
- created after a specific date.

Other search pages in PeopleSoft/FIN also have saved search options that function similarly to what is described below.

# **Read the procedures**

#### **Creating a Saved Search**

- 1. Log into the Finance System.
- 2. From the **Finance & Accounting** homepage, click on the **Create/Update Journal Entries** tile.
- 3. From the Find an Existing Value window, perform your search.

Note: If you have inquiry access, you will already be on the Find an Existing Value page. If you have access to create journal entries, you may have to click the Find an Existing Value button.



4. Once the results of the search appear, select Save Search

# Create/Update Journal Entries

## Find an Existing Value

#### Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches     Choose from recent	t searches	v //	Saved Searches	Choose fr
Business Unit	= 🖌	UCOLO	Q	
Journal ID	begins with 🗸			
Journal Date	>= 🗸	01/01/2024	31	
Document Sequence Number	begins with 🗸			
Line Business Unit	= 🗸		Q	
Journal Header Status	= 🗸	~		
Budget Checking Header Status	= 🗸	~		
Source	= 🗸		Q	
Entered By	begins with 🗸		Q	
Attachment Exist	= 🗸	~		
Journal Class	begins with 🗸		Q	
A Show fewer opti	ions			
Case Sensitive				
Search	Clear	Save Search		

- 5. Enter a name for the search.
- 6. Click Save.
- 7. Click OK.

### **Using a Saved Search**

- 1. From the?Finance & Accounting?homepage, click on the?Create/Update Journal Entries?tile.
- 2. On the Find an Existing Value page, next to **Saved Searches**, click the *Choose from* saved searches **dropdown**





- 3. Select the desired Saved Search.
- 4. Click Search.

### Want to edit a Saved Search?

1. On the Find an Existing Value page, next to **Saved Searches**, click the **pencil icon** next to the *Choose from saved searches* **dropdown**.

Find	an Existing Valu	e				
💌 Sea	rch Criteria					
Enter	any information you	have and click Search. I	Leave fields blank f	or a list of all value	S.	
۳	Recent Searches	Choose from recent se	earches	<ul> <li>✓</li> </ul>	Saved Searches	Choo

- To rename a Saved Search: Click the Rename link, then enter the new name for the search. Click Save.
- To delete a Saved Search: Click the X next to the desired Saved Search.
- To delete all your Saved Searches: Click the Delete All option.
- 3. Click Save.
- 4. A confirmation message will appear. Click OK.

## Have a question or feedback?

## Questions & Feedback [2]

Feedback or Question \*

## Your Name

#### Your Email Address

- CAPTCHA -

This question is for testing whether or not you are a human visitor and to prevent automated spam submissions.

Submit

Controller

Source URL: https://www.cu.edu/controller/fin-how-saving-journal-entry-searches

#### Links

[1] https://www.cu.edu/controller/fin-how-saving-journal-entry-searches [2] https://www.cu.edu/controller/forms/questions-feedback-0