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 searches ▼ | ✏️   🔖 Saved Searches | Choose fr

Business Unit	= ▼	UCOLO 🔍
Journal ID	begins with ▼	
Journal Date	>= ▼	01/01/2024 📅
Document Sequence Number	begins with ▼	
Line Business Unit	= ▼	🔍
Journal Header Status	= ▼	▼
Budget Checking Header Status	= ▼	▼
Source	= ▼	🔍
Entered By	begins with ▼	🔍
Attachment Exist	= ▼	▼
Journal Class	begins with ▼	🔍

∧ Show fewer options

☐ 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**

.

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 searches | ✎   🔖 Saved Searches | Choose fr

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**.

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 searches | ✎   🔖 Saved Searches | Choose fro

2. Make your edits -
   ○ **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

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