

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.

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The screenshot shows the 'Create/Update Journal Entries' page. At the top right, there is a dark header with the text 'Create/Update Journal Entries'. Below this, the page title 'Create/Update Journal Entries' is displayed. On the left, there is a link 'Add a New Value'. On the right, a button labeled 'Find an Existing Value' is highlighted with a red rectangular box. Below these elements is a search form with three input fields: '*Business Unit' with the value 'UCOLO', '*Journal ID' with the value 'NEXT', and '*Journal Date' with the value '01/31/2024'. An 'Add' button is located at the bottom of the form.

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  

Business Unit 

Journal Date 

Line Business Unit 

Budget Checking Header Status 

Entered By 

Journal Class 

[^ Show fewer options](#)

Case Sensitive

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  Saved Searches

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  Saved Searches

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

CAPTCHA

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

Submit

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>