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FIN How-to: Using Saved 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:

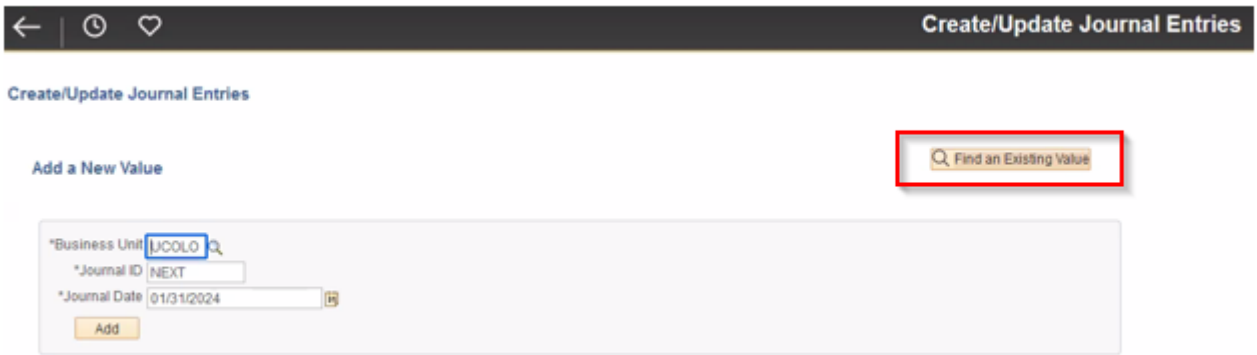
- ?created by a specific user.
- not posted for your source code.
- created after a specific date.

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

Read the procedures

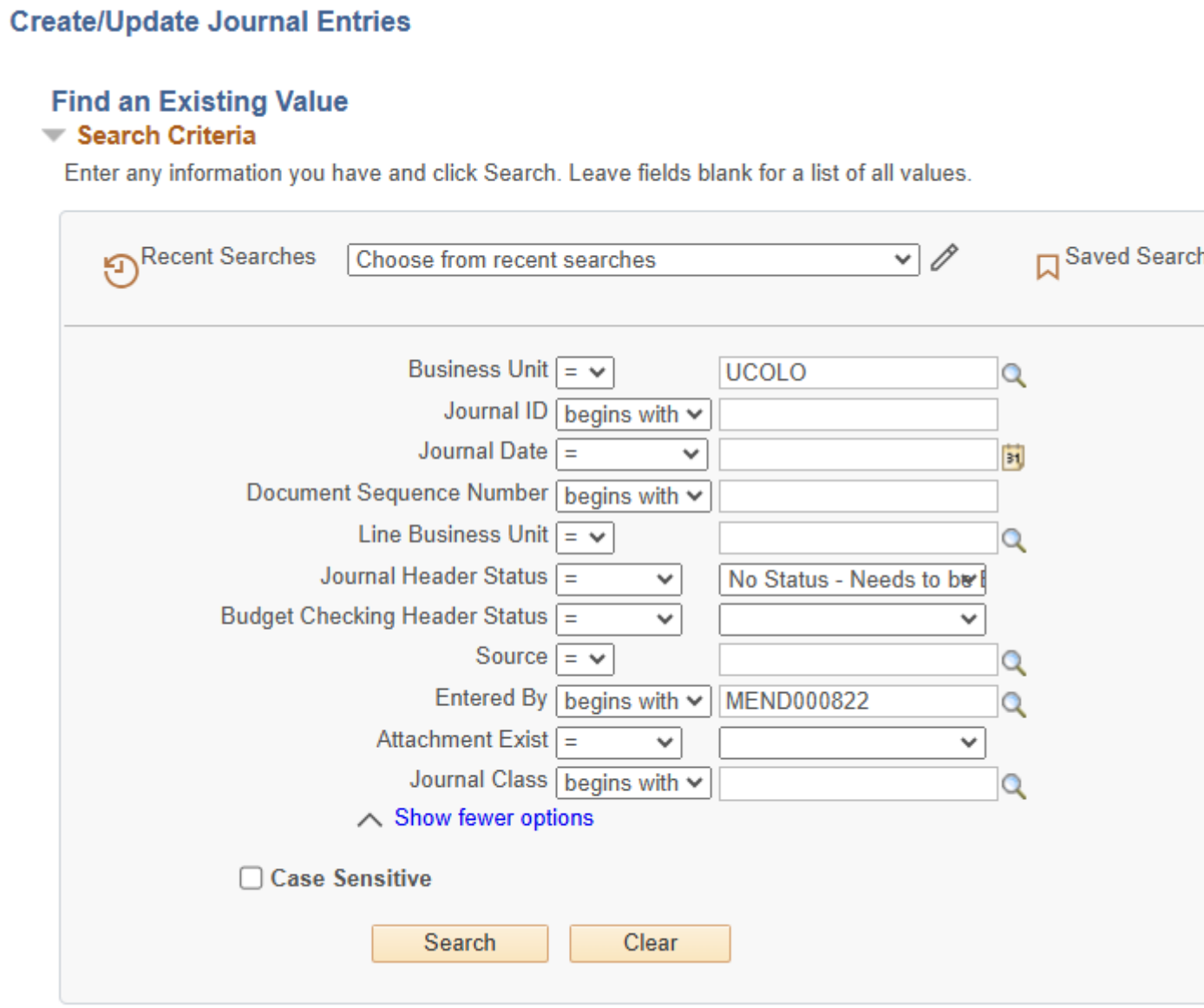
Creating a Saved Search

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**

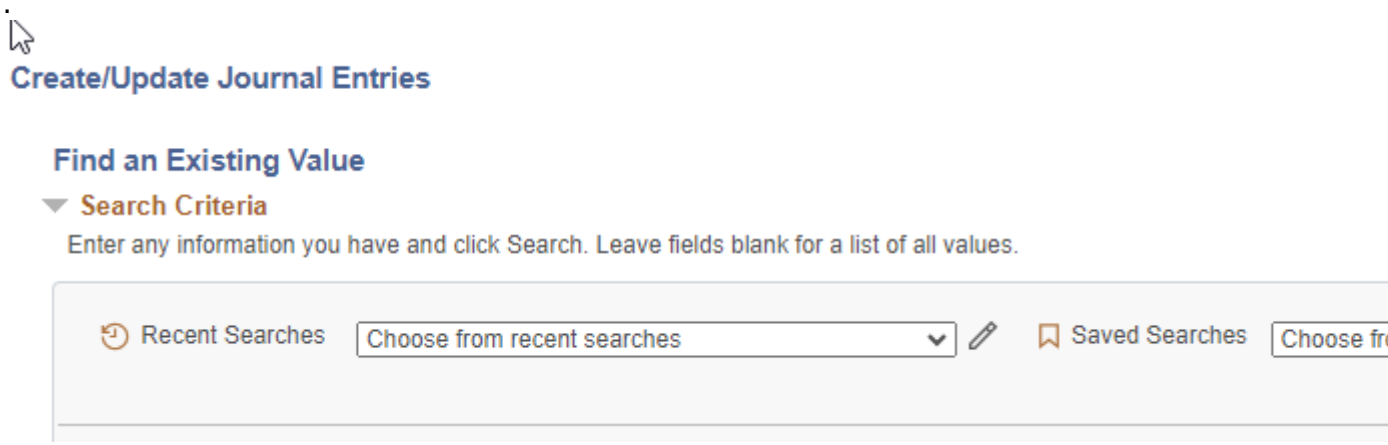
.



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

Using a Saved Search

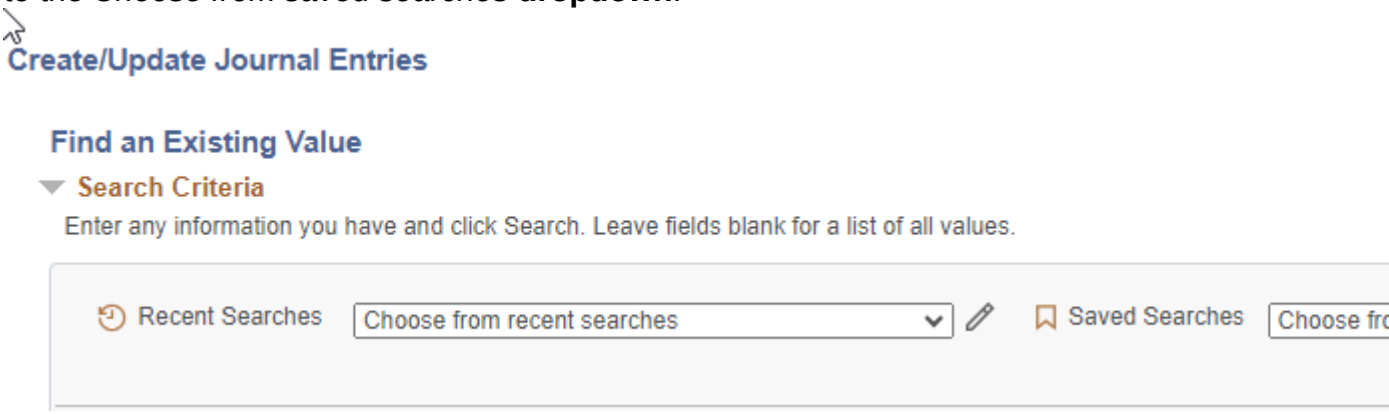
1. From the**?Finance & Accounting?**homepage, click on the**?Create/Update Journal Entries?**tile.
2. On the Find an Existing Value page, next to **Saved Searches,** click the *Choose from saved searches* **dropdown**



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**.



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?

For questions or feedback contact

Source URL:https://www.cu.edu/controller/fin-how-using-saved-searches

Links
[1] https://www.cu.edu/controller/fin-how-using-saved-searches
[2] mailto:fss@cu.edu?subject=Question%20or%20Feedback%20&body=What%20page%20this%20is%20from:%20' + window.location.href +