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Finance System Learning Resources: General/Inquiry [1]

For access to the Finance System, visit the Access & Training Requirements guide [2].

Logging in to the Finance System

Log in to your campus portal [3] and on the **CU Resources Home** tab, click the **Finance** tile.

Favorites and Recent Places

Adding Favorites and Recent Places [4] - Favorites are shortcuts that can be used for tasks that you complete frequently. Recent Places is a list of the last five pages you visited.

Inquiry

Searching the Finance System

- Searching for Journal Entries [5] - You can search through all journal entries or just journal entries you created, using a variety of search criteria.
- Using Saved Searches [6]- The Saved Searches features makes it easier for you to find journal entries.
- Looking Up Finance System Roles [7] - Look up a person's roles in FIN. If you have questions about what a role does, you can check out the role names and descriptions page [8] *(must be signed in to VPN to access this page).*
- Using Keyword Search [9] - Use Keyword Search to search for transactions like journal entries and vouchers
- Using Menu Search [10] – Use Menu Search to find a page in FIN rather than navigate through submenus.
- Disabling Autocomplete [11] – As you type in FIN, the system provides a drop-down list of items that match your criteria. Update your FIN preferences to disable autocomplete if this is cumbersome.
- Looking Up an Org Officer [12] - Here are three options for looking up your Org's officer.

Looking Up Payment Information

- Viewing Check Details [13] – Look up information about a check, including whether it has been cashed and where it was sent. It's helpful to some information about the payment, like the check/warrant number.

Looking Up ChartField Information

- Looking Up Available Gift Fund Balances [14] - Look up the CU Foundation available balance for a linked Fund 34 Gift Speedtype in the Finance System -- or run an m-Fin report in the CU-Data System.
- Looking Up Fund-Account Combo Errors [15] – Look up which account codes are allowable for each fund. Use this information to correct Fund-Account Combo errors for journal entries and select account codes for Marketplace requisitions.
- Looking Up?ChartFields [16] – Look up Funds, Orgs, Programs, Projects, Sub-Classes, and Accounts to see description and attributes.
- Looking Up SpeedTypes [17] – Look up a SpeedType to see its effective date, FOPPS values, Org/Program/Project managers and officers, and fiscal staff. For a Fund 34 SpeedType, also see the gift's description, gift purpose codes, and Foundation Available Balance.
- Looking Up Your Grant Accountant [18] - Look up the grant accountant assigned to a Fund 30/31/33 sponsored project/SpeedType.

Workflow

Worklists [19] – Open your worklist to see prioritized lists of work items that are awaiting action by you (Sample Worklist [20]).

Groups audience:
Controller
Right Sidebar:
OUC - Relevant Links for Fin System

Source URL:https://www.cu.edu/controller/finance-system-learning-resources-generalinquiry

Links
[1] https://www.cu.edu/controller/finance-system-learning-resources-generalinquiry
[2] https://www.cu.edu/psc/policies/access-training-requirements [3] http://my.cu.edu
[4] https://www.cu.edu/controller/fin-how-adding-favorites-and-recent-places
[5] https://www.cu.edu/controller/fin-how-searching-journal-entries [6] https://www.cu.edu/controller/fin-how-Using-Saved-Searches [7] https://www.cu.edu/controller/fin-how-looking-up-finance-system-roles
[8] https://www.cusys.edu/iam/CUonly/FIN9.2_Role_Definitions_and_Access_Request_Guide.xlsx
[9] https://www.cu.edu/controller/fin-how-keyword-search [10] https://www.cu.edu/controller/fin-how-menu-search [11] https://www.cu.edu/controller/fin-how-disabling-autocomplete [12] https://www.cu.edu/controller/fin-how-looking-up-org-officer [13] https://www.cu.edu/controller/fin-how-viewing-check-details [14] https://www.cu.edu/controller/finm-fin-how-looking-up-available-gift-fund-balances [15] https://www.cu.edu/controller/fin-how-looking-up-fund-account-combo-errors
[16] https://www.cu.edu/controller/fin-how-chartfield-lookup [17] https://www.cu.edu/controller/fin-how-looking-up-speedtypes [18] https://www.cu.edu/controller/fin-how-looking-up-your-grant-accountant
[19] https://www.cu.edu/controller/fin-how-worklists [20] https://www.cu.edu/controller/fin-how-sample-worklist