

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 Payment Information

- [Viewing Check Details](#) ^[12] – 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](#) [13] - 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](#) [14] – 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](#) [15] – Look up Funds, Orgs, Programs, Projects, Sub-Classes, and Accounts to see description and attributes.
- [Looking Up SpeedTypes](#) [16] – 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.

Workflow

[Worklists](#) [17] – Open your worklist to see prioritized lists of work items that are awaiting action by you ([Sample Worklist](#) [18]).

General Ledger Updates

Specialized instructions for the campus finance staff.

- [ChartFields Set-up Step-by-Step](#) [19]
- [Allocations Reorg Step-by-Step](#) [20]
- [UCB Allocations LOC Step-by-Step?](#) [21]

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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-saving-journal-entry-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-viewing-check-details> [13] <https://www.cu.edu/controller/finm-fin-how-looking-available-gift-fund-balances> [14] <https://www.cu.edu/controller/fin-how-looking-fund-account-combo-errors> [15] <https://www.cu.edu/controller/fin-how-chartfield-lookup> [16] <https://www.cu.edu/controller/fin-how-looking-speedtypes> [17] <https://www.cu.edu/controller/fin-how-worklists>

[18] <https://www.cu.edu/controller/fin-how-sample-worklist> [19] <https://www.cu.edu/controller/chartfields-setup-step-step> [20] <https://www.cu.edu/controller/allocations-reorg-step-step>
[21] <https://www.cu.edu/controller/ucb-allocations-loc-step-step>