Finance System Learning Resources: General/Inquiry [1]

Logging in to the Finance System

Log in to your campus portal [2] and on the CU Resources Home tab, click the Finance tile.

Favorites and Recently Used

Favorites are shortcuts that can be used for tasks that you complete frequently. Recently Used is a list under Favorites of the last five places you went.

- Adding Favorites and Recently Used [3]

Inquiry

Looking Up Available Gift Fund Balances

You can 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 Employee Reimbursements

- FIN How-to: Looking Up Employee Reimbursements [5]

Looking Up PAs and NRIs

You can look up the status of Non-Employee Reimbursement (NR) forms and Payment Authorization (PA) forms.

- FIN How-to: Looking Up PAs and NRIs [6]

SpeedType Inquiry/ChartField LookUp

To look up a SpeedType or ChartField, you will navigate to Set Up Financials/Supply Chain, Common Definitions, Design ChartFields, then Define Values, and either select ChartField Values or CU SpeedTypes.
Looking up Fund-Account Combo Errors

Do you have a question about using a certain Account code with a certain Fund? Perhaps you got an error on a line in a Journal Entry … or in a requisition in the Marketplace … and you want to find out what Funds are allowable for the Account you’re using? You can look up the answers to your questions on the Fund-Account Combo Edit page.

Viewing Attachments

You have the ability to look up a transaction and view any associated attachments.

Menu Search

Menu Search works similar to a Google search. As you begin typing a word in the search menu (under Main Menu), the system will provide a drop-down list of items that match your criteria. You can then select your desired item from the list.

Keyword Search

The keyword search option allows you to search for transactions in the system in a format similar to a google search.

Disabling Autocomplete

Autocomplete works similar to autocorrect on your smartphone. As you begin typing a word in a search field, the system will provide a drop-down list of items that match your criteria. If you find this cumbersome, you may turn this feature off.

Viewing Check Details

Workflow
Notifications

You can receive email notifications via a defined workflow criteria, such as for journal entry approvals.

Worklists

Worklists are prioritized lists of work items that are awaiting action by you.

- FIN How-to: Worklists [15]
- FIN How-to: Sample Worklist [16]

General Ledger Updates

Specialized instructions for the campus finance staff.

- ChartFields Set-up Step-by-Step [17]
- Allocations Reorg Step-by-Step [18]
- UCB Allocations LOC Step-by-Step [19]

Groups audience:
Controller

Right Sidebar:
OUC - Relevant Links for Fin System
PSC - Need Help?

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

Links
[1] https://www.cu.edu/controller/finance-system-learning-resources-generalinquiry
[8] https://www.cu.edu/controller/fin-how-looking-speedtypes
[10] https://www.cu.edu/controller/fin-how-viewing-attachments
[12] https://www.cu.edu/controller/fin-how-keyword-search
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