Published on *University of Colorado* (https://www.cu.edu)

m-Fin How-to: Searching in CU-Data [1]

Did you know you can search for a value on the prompt page of an m-Fin report?
In other words: if you don't remember a SpeedType, or you don't know someone's Employee ID number, you can look it up using CU-Data's Select and Search feature.

Watch the video

Read the procedures

1. In CU-Data, open the report you want to run. It will open to the report's prompt page where you will enter one or more values to run the report. In this example, we'll search for some SpeedTypes.

2. In the **SPEEDTYPE CODE -- DESCRIPTION (STATUS)** section, enter a search value in the **Keywords** box.

   Your search value can be part of the SpeedType number, or part of its description.

3. The default **Select** and **Search** function looks for values that start with any of the keywords you enter.

   So if you remember the SpeedType starts with **51019**, then just enter 51019.

4. But if you only remember the SpeedType ends in 12345, use the wildcard symbol % and enter **%12345**

5. If you're searching for multiple SpeedTypes, separate them with spaces: **%12345 51098765**.

6. Let's say you're not searching for the SpeedType value directly. Instead, you want to search by SpeedType description. In this case, change the **Options** from *start with* to *contains* … and then enter the description text, for example: **English**

7. Click **Search** or use the enter key. The **Results** box displays any values that match your search.

8.

To select a value, click it and then click **Insert**. This will add it to the **Choice** box. Or -- just double-click the value and it'll automatically be inserted.

To select multiple values at once, hold down the CTRL key while clicking the values you want. Then, click Insert.

9. If you want to look for more values, go ahead and continue to search and insert.

10. A few things to keep in mind:

- You can also use the prompt selections in the white areas of the screen to filter search results. ...So, if you want to pull all the fund 10 SpeedTypes in Org 12345, you could enter 110% in the **Keywords** box and 12345 in the **Org** box.

- You can use the **Status** prompt to filter out inactive SpeedTypes.

- Last but not least: If you're running a single SpeedType and you don't need to search for it -- see if your report offers the **Single SpeedType** prompt at the bottom of the page. It's a real timesaver!

Have a question or feedback?

For questions or feedback contact

Source URL:https://www.cu.edu/controller/m-fin-how-searching-cu-data

Links
[1] https://www.cu.edu/controller/m-fin-how-searching-cu-data
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