

NAVIGATING AND MANAGING NCFS: BASIC SEARCH



QUICK REFERENCE GUIDE BUD-16

The purpose of this Quick Reference Guide (QRG) is to provide North Carolina Financial System (NCFS) users step-by-step and conceptual information on basic search functionality such as adding fields and saving searches.

Overview

The Basic Search functionality allows users to narrow the search results when trying to pull transactions. The Basic Search allows users to search based on a smaller number of search criteria as compared to an advanced search. Each field has a double asterisk next to it, which means it is a system-required field and at least one of these fields must be completed to produce results. If users frequently execute the same search, using the Save feature to save the search criteria can save time. The fields that have been added from the previous section can be included in a saved search. These basic search functionalities described below can be used in any module for this QRG. The basic search has been demonstrated via the General Accounting module.

Basic Search Navigation

To conduct a basic search, please follow the steps below.

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Data Access Set: NC CASH US [Change]									
Manage Journals ⊘									Done
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	** Journal ** Journal Batch ** Accounting Period ** Batch Status	Nov-20	~	•				** At least	tone is required

Basic Search Parameters

The screen displayed below is the *Basic Search* Screen. The Basic Search allows users to search for specified data using a small number of search parameters. The basic search should be used to conduct a faster search when the parameters are known and can be input. The advanced search should be used when less information is known and users want to pull a larger data set.



Saving Search

If users frequently execute the same search, using the Save feature to save the search criteria can save time. The fields that have been added from the previous section can be included in a saved search.

1. In order to create a Saved Search, users must click [SAVE] in the bottom right-hand corner of the screen.

= NCFS									â	☆	P	19	ME~
Data Access Set: NC CASH US [Change]													
Manage Journals (2)													Done
⊿ Search							Basic	Manage Watchlist	Saved Search	All Journals	k)		~
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	Journal	Contains	~										
	** Journal Batch	Starts with	~										
	** Accounting Period	Equals	~	Nov-20		•							
	Source	Equals	~			•							
	Category	Equals	~			•							
	** Batch Status	Equals	~		¥					-			
									Search Rese	t Save	Add Fi	elds 🔻	Reorder

Saved Search Button

2. A pop up appears on the screen with the name *Create Saved Search*. If desired, select the **Set as Default** and **Run Automatically** check box.

⊿ Search				Basic Manage Watchl	st Saved Search	All Journale			
** Journal ** Journal Batch ** Accounting Period Source Category	Contains Starts with Equals Equals Equals	Nov-20	•			Create Saved Search x * Name Mil Journals copy Set as Default Run Automatically OK Cancel			
** Batch Status	Equals 🗸	~							
_					Search Reset	Save Add Fields v Reorder			
Actions View View Format View Pormat De	tach 📣 Wrap	Post Batch Rever	se Batch Revers	e Journal					
2									
Journal Journal Batch	Accounting Period	Source	Category	Journal Entered Debit	Journal Entered Credit	Batch Status			
Ao search conducted.									

Create Saved Search Pop Up

Wrap Up

The NCFS Search capabilities are designed to make it easier to sort through large amounts of data. These capabilities assist users in retrieving and analyzing large sources of data for their business process needs.



Additional Resources

For more information on Searching Capabilities, please review the following materials:

Web Based Training (WBT)

• None

Instructor Led Training (ILT)

• NAV 100: Advanced Navigation and Inquiry

Quick Reference Guides (QRGs)

• None

