



# NAVIGATING AND MANAGING NCFS: BASIC SEARCH QUICK REFERENCE GUIDE BUD-16

BUD

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.

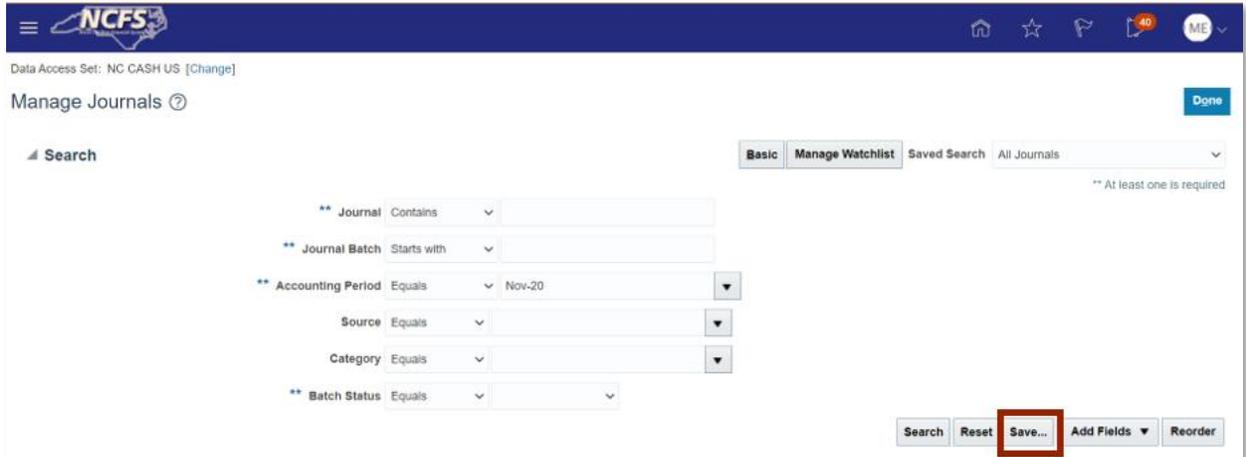
**Basic Search Parameters**

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

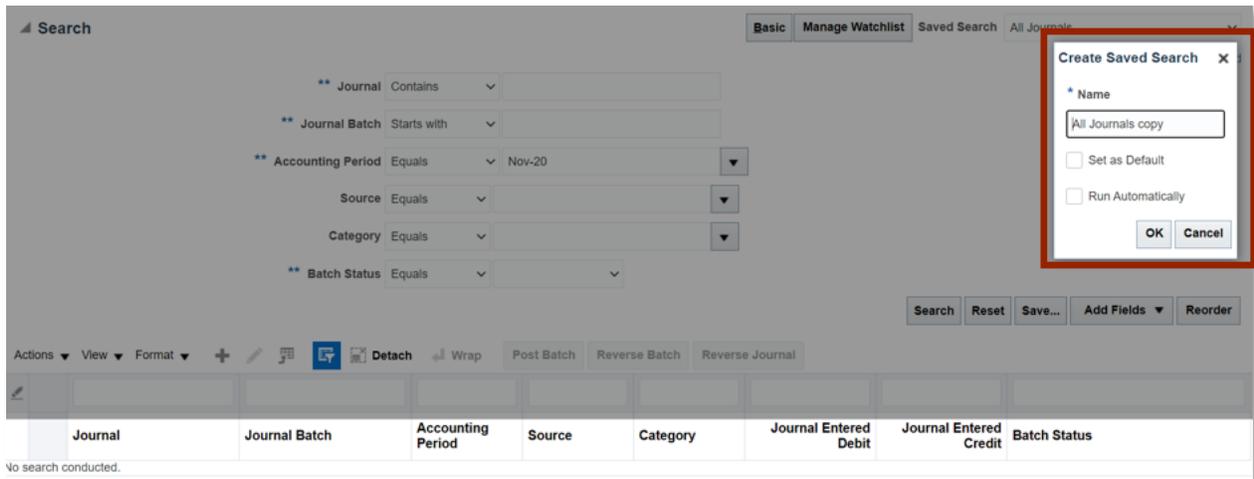
If users frequently execute the same search, using the Save feature to save the search criteria can save time. The fields that have been added from the previous section can be included in a saved search.

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



**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.



**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