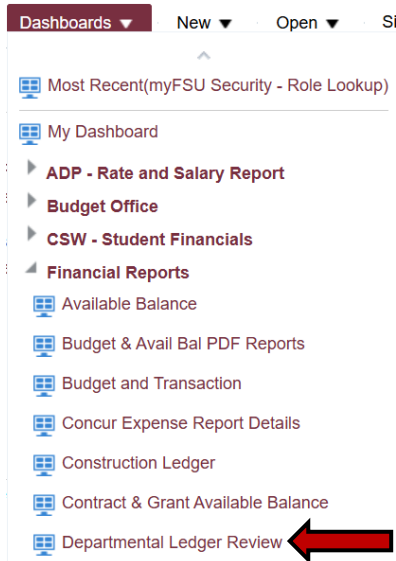


Saving Searches for Projects in BI

How to Save a Search for Projects In BI

1. Log in to BI.
2. Navigate to **Dashboards > Financial Reports > Departmental Ledger Review**.



3. Use the prompt boxes on the left side of the screen to enter your search criteria. You must input the department ID, then select your desired project(s). In this example, we have selected Dept ID 074012 and Project ID 047430.

Departmental Ledger Review

Ledger Balances | Review Certification

Data last loaded on 10/26/2026 02:51:47 AM

* FY (required)
2027

* Ending Period (required)
<= 3

* Dept ID and Desc (required)
074012 - Biology Sponsored

Fund ID and Desc (optional)
--Select Value--

Proj ID and Desc (optional)
047430 - SEED: Identifying

- Click **Apply**.
- Click the tiny **Page Options** cog in the upper-right part of the screen as indicated above in red. This opens the Page Options window.

Departmental Ledger Review Home Catalog Favorites Dashboards New Open Signed In As

Ledger Balances Review Certification

Data last loaded on 10/26/2026 02:51:47 AM

* FY (required)
2027

* Ending Period (required)
3

* Dept ID and Desc (required)
074012 - Biology Sponsored

Departmental Ledger by Account Type
Time run: 10/26/2026 12:17:15 PM

Dept ID	Dept Desc	Fund ID	Fund Desc	Proj ID	Proj Desc	Proj Status	Acct Type Desc	FY 27 PD 0	FY 27 PD 1	FY 27 PD 2	FY 27 PD 3	GL Net Amount
074012	Biology Sponsored Projects	551	Sponsored Programs CRC	047430	SEED: Identifying Stress-Respo	Open	Cash	49,252.75	-4,682.36	-3,420.08	-7,005.57	34,144.74
							Liability				-121.06	-121.06
							Revenue	-60,000.00				-60,000.00
							Salary/OPS Expense	3,966.65	2,433.38	2,433.38	3,650.07	12,483.48
							Other Expense	6,780.60	2,248.98	986.70	3,476.56	13,492.84

Refresh - Print - Export

- Click **Save Current Customization**.

Print

Export to Excel

Refresh

Create Bookmark Link

Create Prompted Link

Apply Saved Customization

Save Current Customization...

Edit Saved Customizations...

Clear My Customization

- Enter a name for your customization and click **OK**. In this example, it is named "047430." This selection is only visible to you.

Save Current Customization ? X

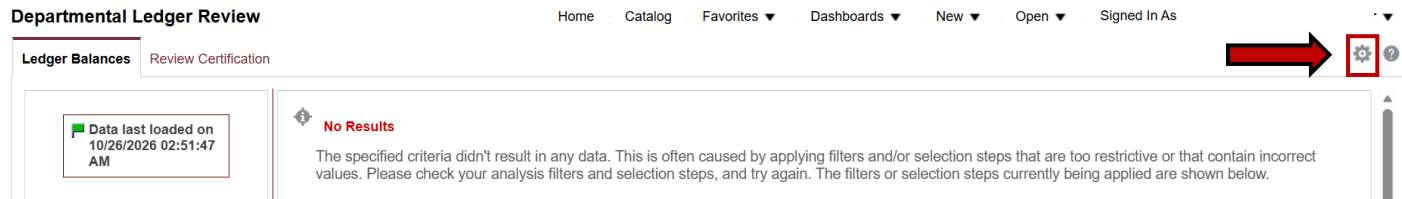
Name 047430

Save for ☒ Me ☐ Others **Set Permissions**

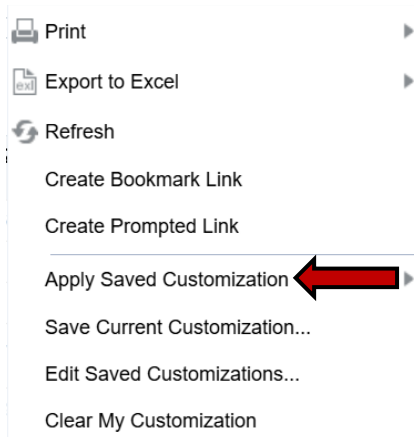
☐ Make this my default for this page

OK **Cancel**

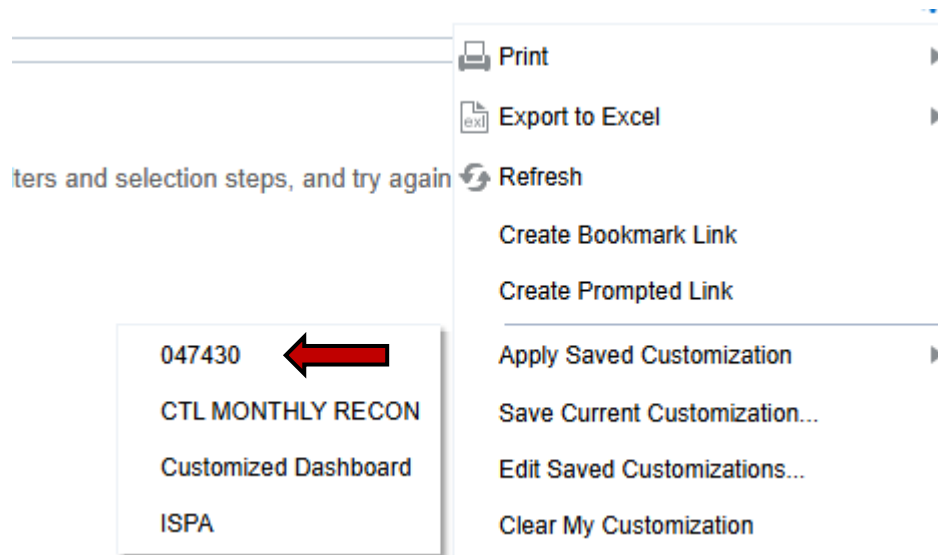
- To access your previously saved search, go to the **Departmental Ledger Review** dashboard and click the **Page Options** cogwheel at the top-right of the screen.



- Click **Apply Saved Customization**.



- Select your saved customization from Step 7 to load the results for that specific project. For this example, we would enter “047430” from Step 7 to return the results for that specific project.



- Update the **Fiscal Year (FY)** or **Ending Period** as needed.