



Cardinal FIN Search Pages Overview

This Job Aid provides overview information pertaining to the Cardinal FIN Search pages and step-by-step instructions on how to utilize the search features available on the Cardinal FIN Search pages.

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Cardinal Financials (FIN) Job Aid

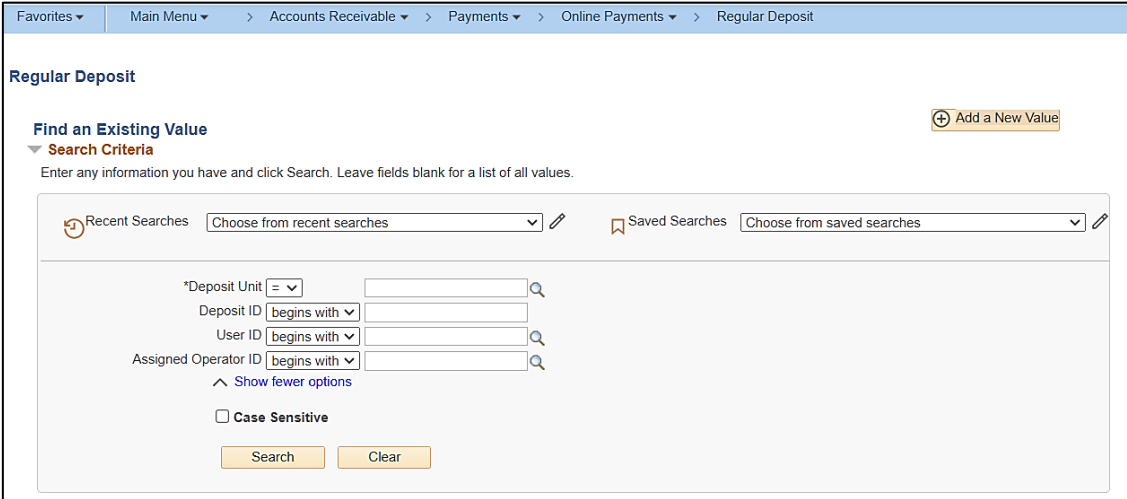
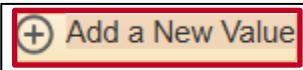
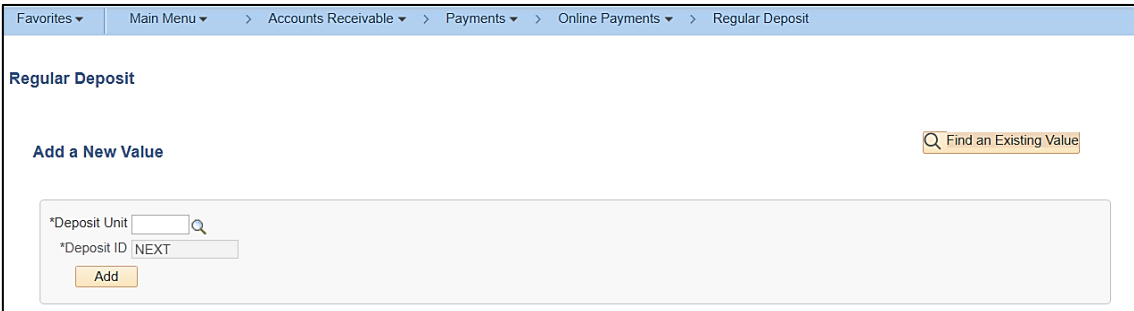
Overview of the Cardinal FIN Search Pages



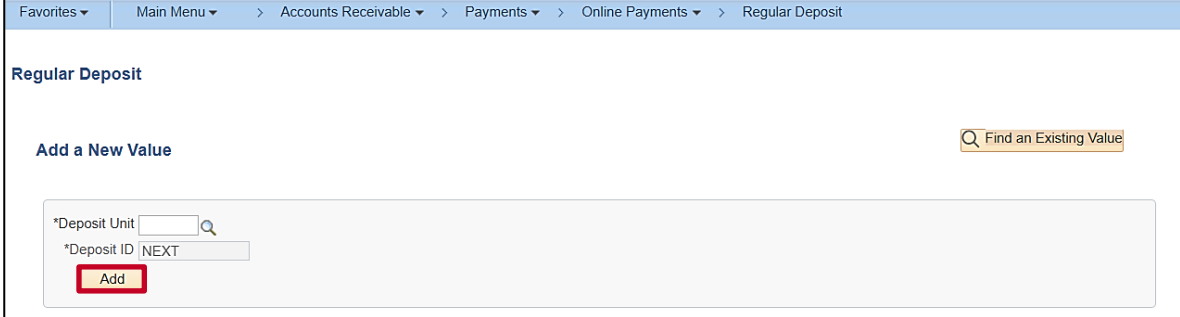
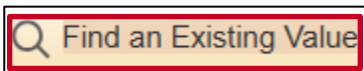
Revision History

| Revision Date | Summary of Changes |
|---------------|--------------------|
| 3/1/2025 | Baseline |

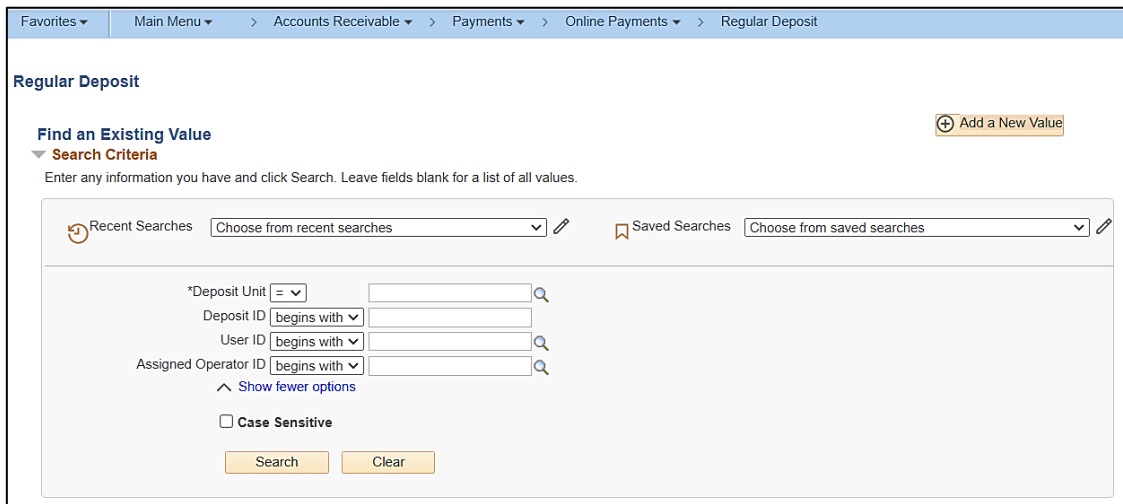
Overview of the Cardinal FIN Search Pages


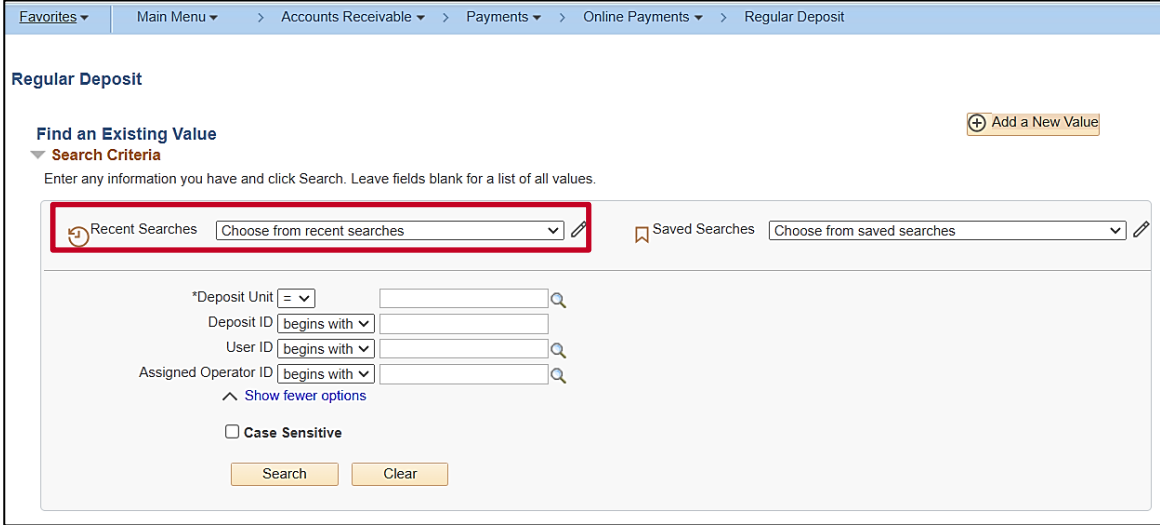

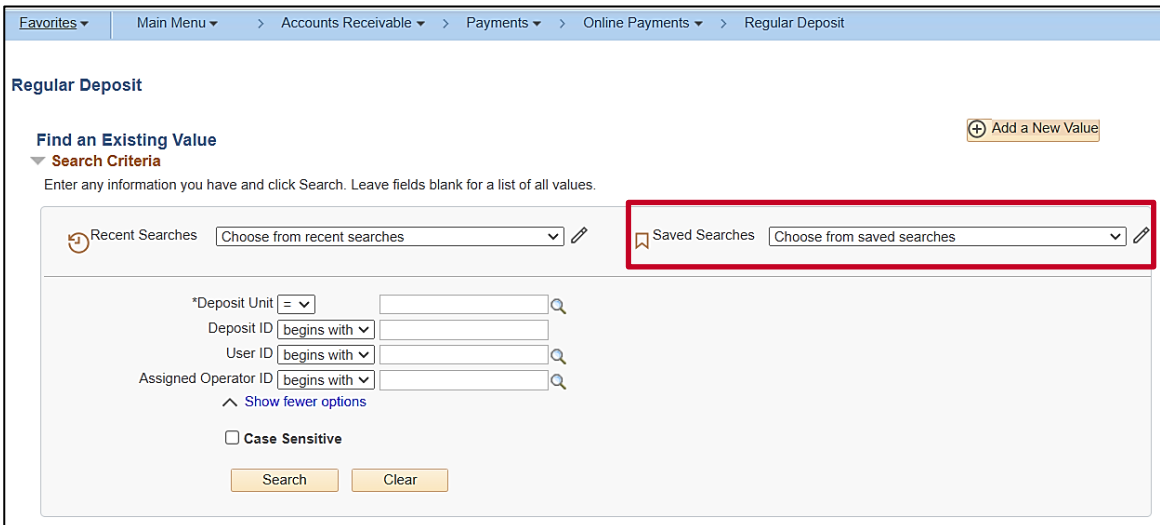
Many of the transactional processes in Cardinal Financials (FIN) begin with a Search page. These search pages are used to search for and select the specific data element (Business Unit, Voucher, Journal, Deposit, etc.) for which the transaction will be processed. This section provides overview information pertaining to the features available for use on the Cardinal FIN Search pages. This section specifically uses the Regular Deposit Search page for demonstration purposes. However, most of the features discussed are applicable for use on any of the Cardinal FIN Search pages.


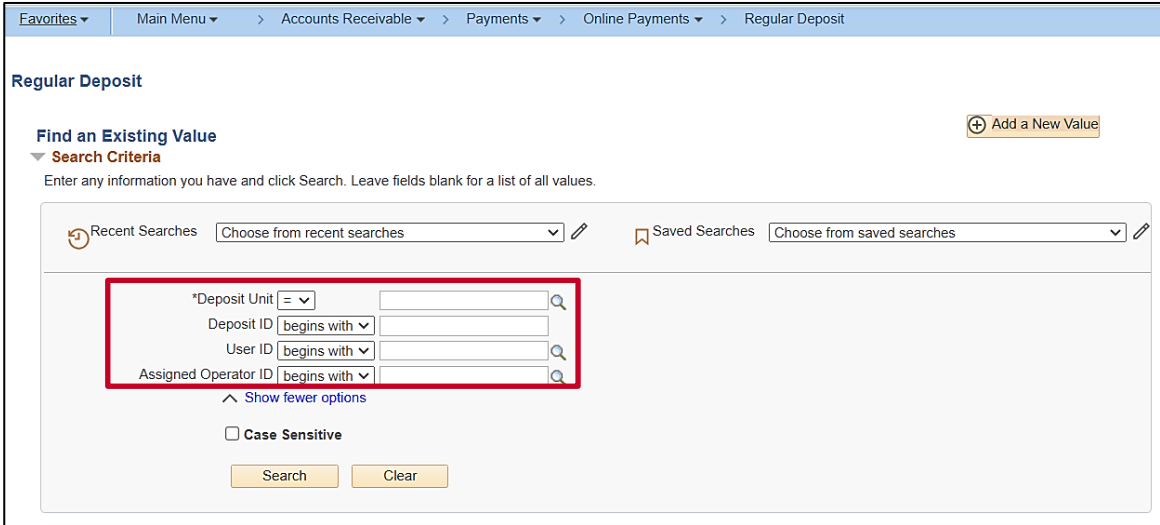
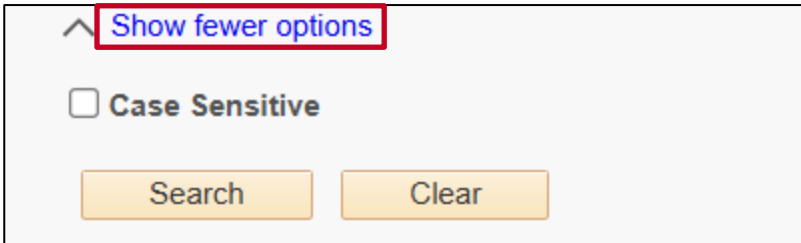

| Step | Action |
|-----------|---|
| | <p>This overview begins at the Regular Deposit Find an Existing Value page (Search page).</p>  |
| <p>1.</p> | <p>Some of the FIN Search pages will include an Add a New Value button. This feature is typically used when the user is adding a new Run Control ID (generating reports) or, as in this example, adding a new Regular Deposit.</p> <p>Click the Add a New Value button.</p>  |
| | <p>The Regular Deposits Add a New Value page displays.</p>  |

| Step | Action |
|---|---|
|  | <p>A Find an Existing button displays on the Add a New Value page which allows users to return to the Search page.</p> |
|  | <p>When adding a new value, simply populate the applicable fields (Deposit Unit for this example) and then click the Add button.</p>  <p>Once the Add button is clicked, the applicable transaction page displays and allows the user to add a transaction or Run Control ID as applicable.</p> |
| 2. | <p>Click the Find an Existing Value button.</p>  |

The **Regular Deposit Find an Existing Value** page (Search page) redisplay.

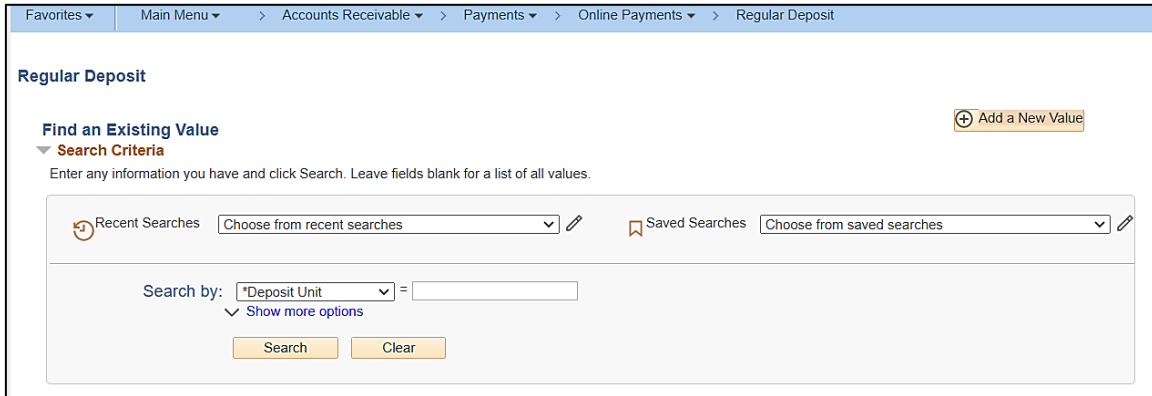


| Step | Action |
|---|---|
|  | <p>The Recent Searches feature allows users to quickly repeat a recently performed search based on the search parameters that were used. Cardinal automatically saves all searches performed on this specific Search page and makes them available for use with this feature.</p>  <p>For more information on using and managing the recent searches, refer to the Using and Managing Recent Searches section in this Job Aid.</p> |
|  | <p>The Saved Searches feature allows users to quickly repeat a search that they have saved based on the search parameters that were used. Only searches performed on this specific Search page that were saved by the user are available for use with this feature.</p>  <p>For more information on creating a saved search, refer to the Creating a Saved Search section of this Job Aid.</p> <p>For more information on using and managing the saved searches, refer to the Using and Managing Saved Searches section in this Job Aid.</p> |

| Step | Action |
|---|---|
|  | <p>Each Cardinal FIN Search page will have specific search criteria fields available for use when performing searches. The search criteria fields available will vary based on the specific Search page. These fields are used to define the parameters for the search and will help limit/define the resulting search results. Use the dropdown buttons or Look Up icons when available to search for and select the applicable data element.</p>  |
| <p>3.</p> | <p>Click the Show fewer options link to display less options.</p>  |
|  | <p>On some pages, this link defaults as Show more options. It can be clicked to show more search options.</p> |

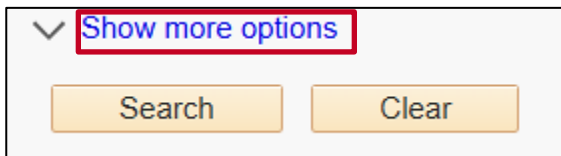
| Step | Action |
|------|--------|
|------|--------|

The **Regular Deposit Find an Existing Value** page refreshes with less available search criteria fields displayed.



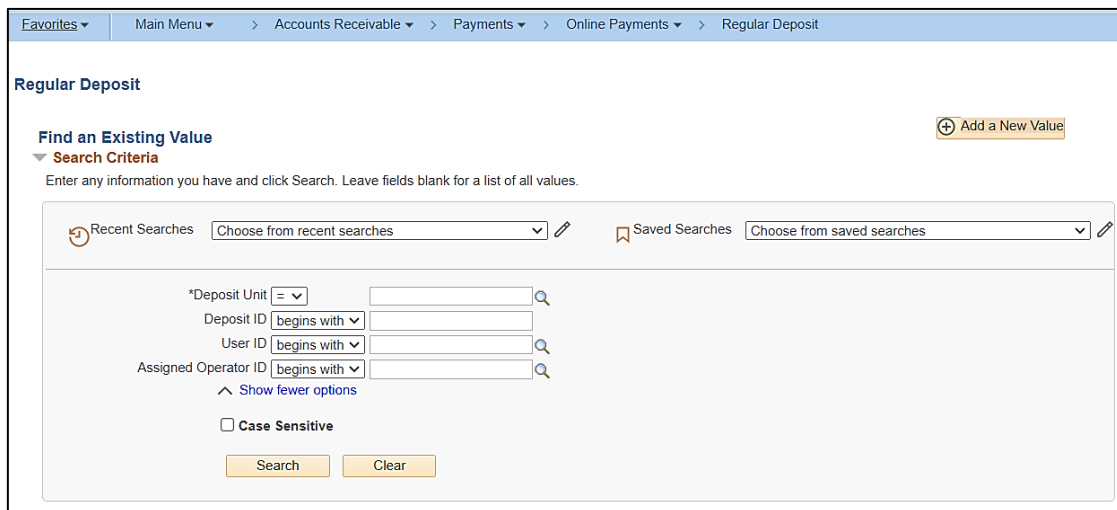
The screenshot shows the 'Regular Deposit' page with the 'Find an Existing Value' section. Under 'Search Criteria', there are two dropdown menus for 'Recent Searches' and 'Saved Searches'. Below them, the search criteria are limited to a single dropdown for '*Deposit Unit' followed by an equals sign and a text input field. A 'Show more options' link is visible below the search criteria. 'Search' and 'Clear' buttons are at the bottom.

3. Click the **Show more options** to display all of the search options.



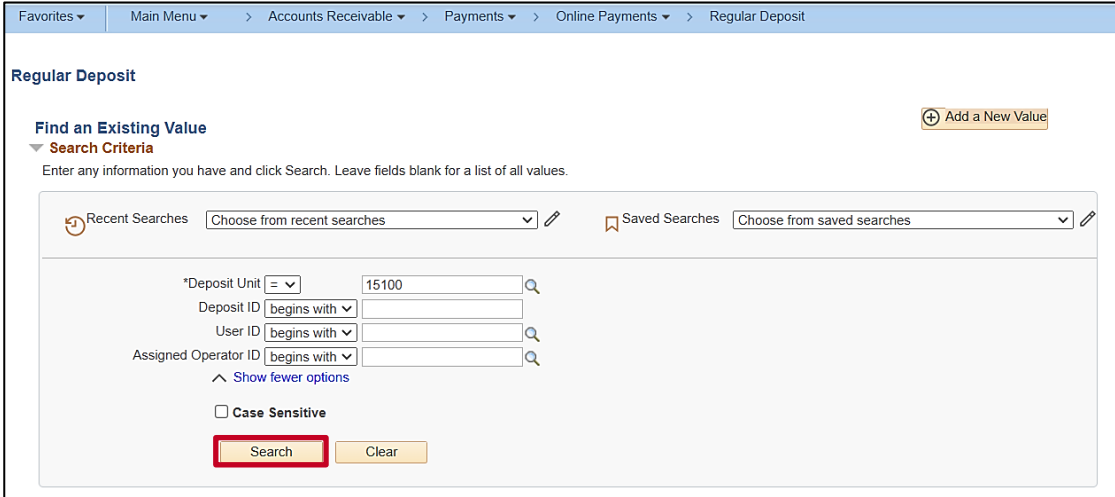

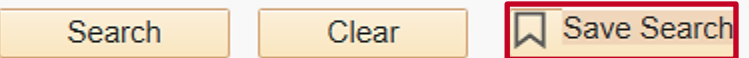


This close-up shows the 'Show more options' link, which is highlighted with a red box. Below it are the 'Search' and 'Clear' buttons.

The **Regular Deposit** page refreshes and all available search criteria fields display.



The screenshot shows the 'Regular Deposit' page with the 'Find an Existing Value' section. Under 'Search Criteria', there are two dropdown menus for 'Recent Searches' and 'Saved Searches'. Below them, the search criteria are expanded to include: '*Deposit Unit' (dropdown), 'Deposit ID' (dropdown with 'begins with' filter), 'User ID' (dropdown with 'begins with' filter), and 'Assigned Operator ID' (dropdown with 'begins with' filter). A 'Show fewer options' link is visible below the search criteria. A 'Case Sensitive' checkbox is also present. 'Search' and 'Clear' buttons are at the bottom.

| Step | Action |
|---|---|
|  | <p>Once all of the search criteria have been entered, the Search button is used to execute the search. If the search produces multiple results, the Search Results section will display at the bottom of the page and the user must select the applicable data element (Business Unit, Employee, etc.). If the search only produces one result, the applicable transaction page will automatically display.</p> <p>The Clear button is used to clear any previously entered search criteria.</p> <div data-bbox="256 562 766 659" style="border: 1px solid black; padding: 5px; text-align: center;">  </div> |
| 4. | <p>For this scenario, the applicable search results have been entered/selected. Click the Search button.</p> <div data-bbox="256 779 1365 1272" style="border: 1px solid black; padding: 5px;">  </div> |
|  | <p>The Save Search button displays after the Search button is clicked. It is used to save this search (with search parameters) to your Saved Searches.</p> <div data-bbox="256 1394 1042 1499" style="border: 1px solid black; padding: 5px; text-align: center;">  </div> <p>For more information on creating a saved search, refer to the Creating a Saved Search section in this Job Aid.</p> |

| Step | Action |
|------|--------|
|------|--------|

The **Search Results** section displays at the bottom of the page.

▼ Search Results
2 results - Deposit Unit "15100"

| View All First 1-2 of 2 Last | | | | | | | | | |
|--------------------------------|------------|---------|----------------------|-----------|--------------|-----------------|--------------|-------------|---|
| Deposit Unit | Deposit ID | User ID | Assigned Operator ID | Bank Code | Bank Account | Deposit Balance | Entered Date | Posted Date | |
| 15100 | 1729 | | | 1100 | TR01 | Yes | 07/25/2024 | | > |
| 15100 | 1730 | | | 1100 | TR01 | Yes | 07/26/2024 | | > |

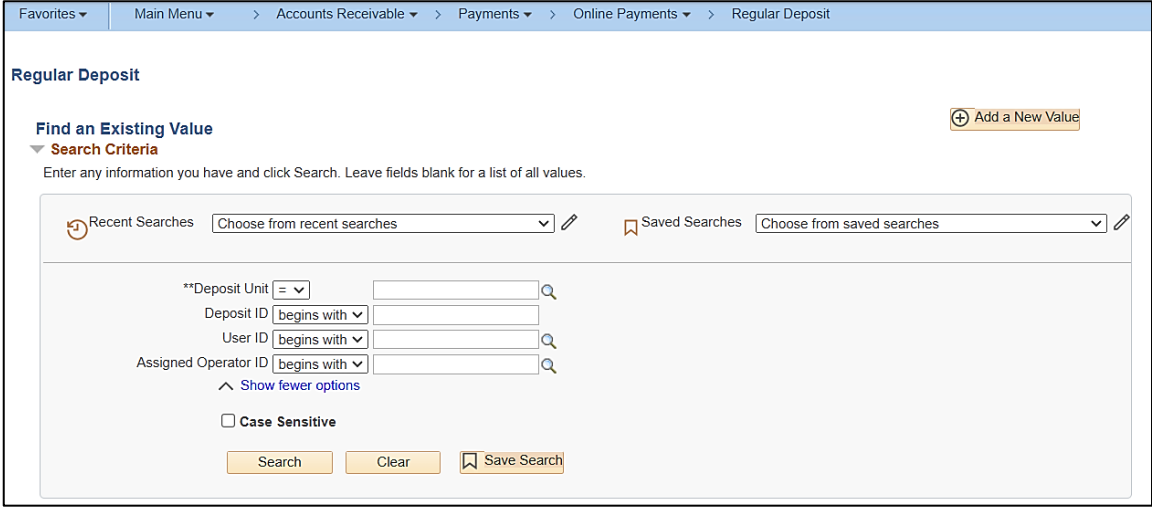


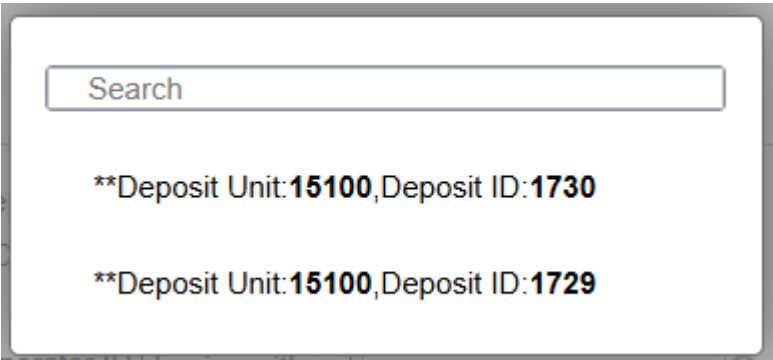
If the search produces multiple search results (as in this example) the user must select the applicable data element by clicking the corresponding **Drill in** icon. Once clicked, the transactional page will display for the selected data element.

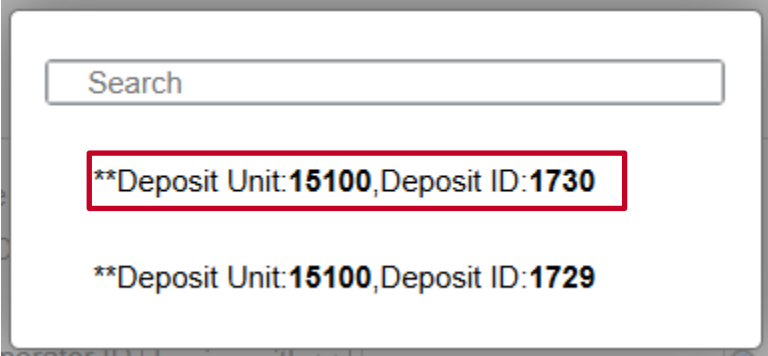
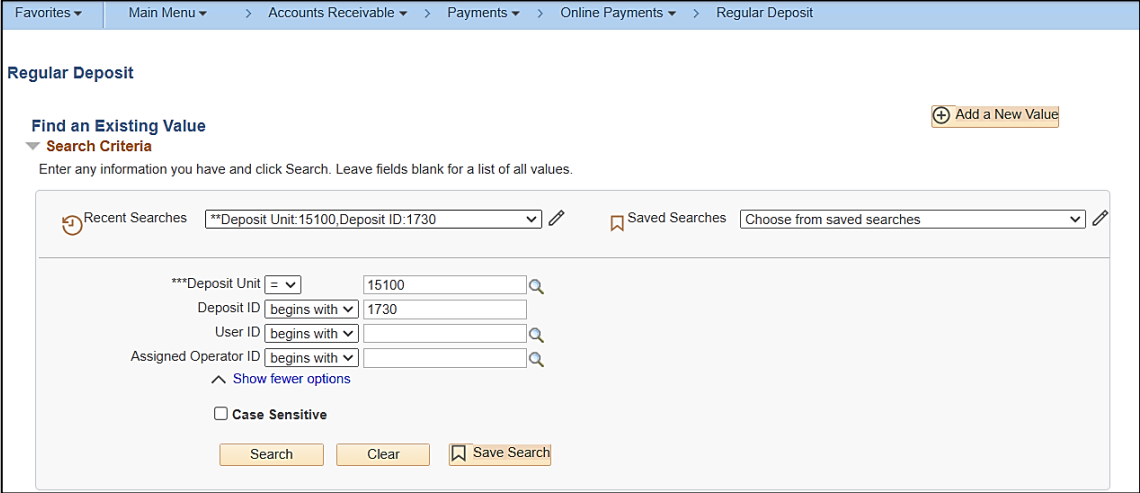



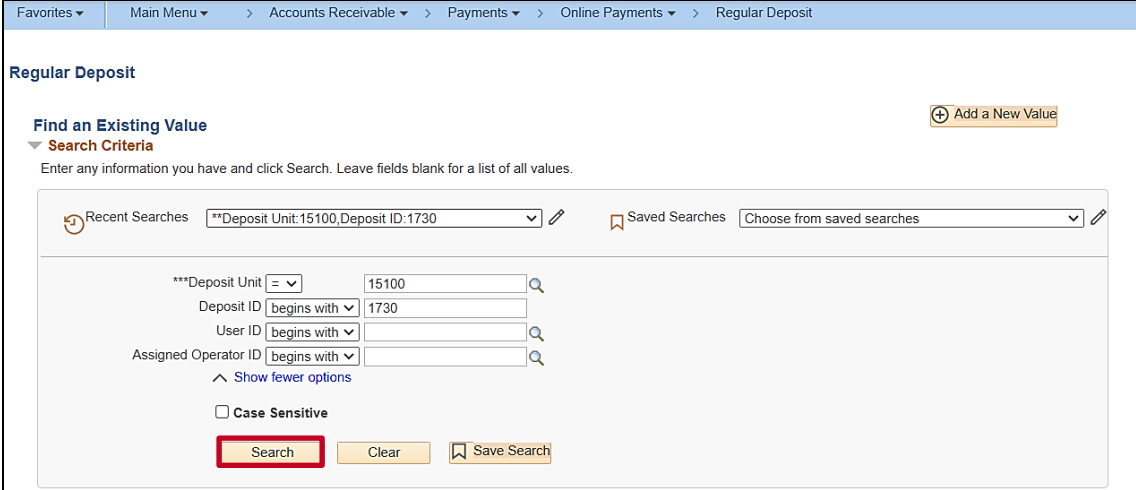



| Deposit Unit | Deposit ID | User ID | Assigned Operator ID | Bank Code | Bank Account | Deposit Balance | Entered Date | Posted Date | |
|--------------|------------|---------|----------------------|-----------|--------------|-----------------|--------------|-------------|---|
| 15100 | 1729 | | | 1100 | TR01 | Yes | 07/25/2024 | | > |

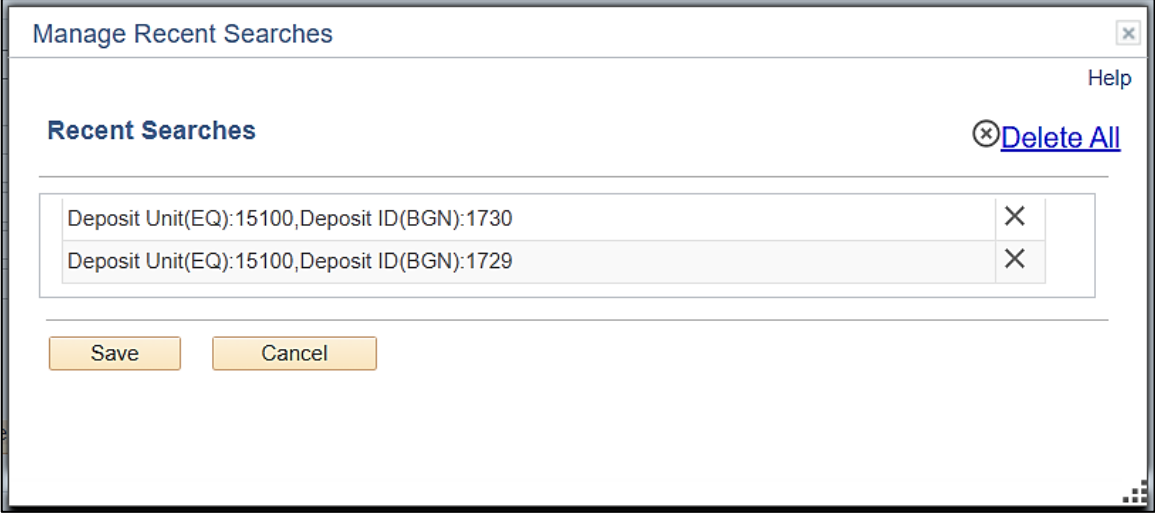



Using and Managing Recent Searches

The **Recent Searches** feature allows users to quickly repeat a recently performed search based on the search parameters that were used. Cardinal automatically saves all searches performed on this specific Search page and makes them available for use with this feature.

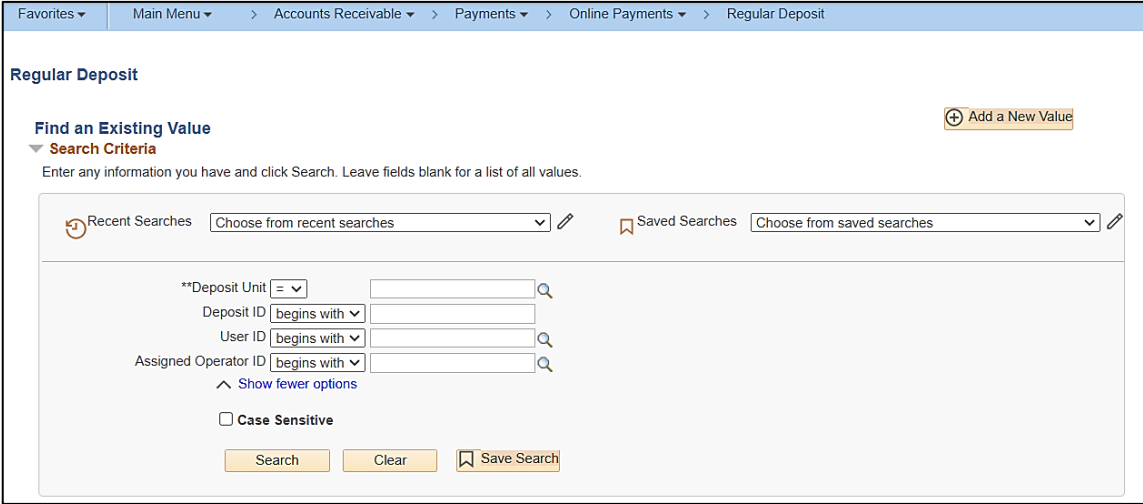

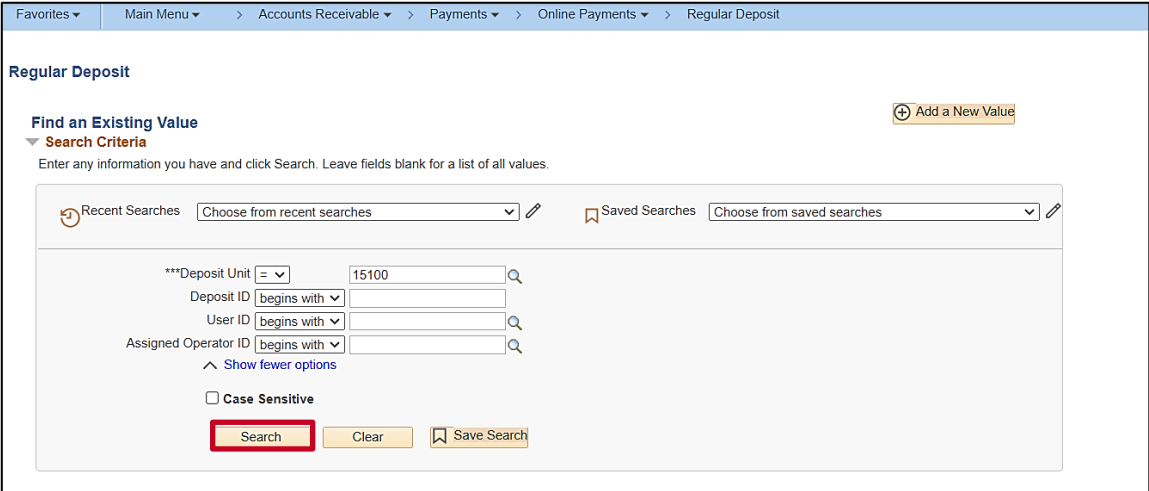
| Step | Action |
|---|---|
| | <p>This section begins at the Regular Deposit Find an Existing Value page (Search page).</p>  |
|  | <p>The first portion of this section demonstrates the process for using a recent search.</p> |
| <p>1.</p> | <p>Click the Recent Searches dropdown button.</p>  |
| | <p>The Recent Searches page display in a pop-up window.</p>  |

| Step | Action |
|--|---|
| 2. | <p>Select the recent search to execute by clicking the corresponding list item (Deposit Unit: 15100, Deposit ID:1730 in this scenario).</p>  |
| <p>The Regular Deposit Find an Existing Value page redisplay and refreshes based on the recent search selected.</p>  | |
|  | <p>Notice that the search criteria field(s) are populated based on the recent search selected.</p> |

| Step | Action |
|---|--|
| 3. | <p>Click the Search button.</p>  |
|  | <p>For this scenario, there is only one result, so the transaction page displays.</p> <p>If the search produces multiple search results the user must select the applicable data element by clicking the corresponding Drill in icon. Once clicked, the transactional page will display for the selected data element.</p>  <p>The next portion of this section provides an overview of the tools available to users to manage their recent searches.</p> |
| 4. | <p>Click the Recent Searches Edit icon (pencil).</p>  |

| Step | Action |
|--|---|
| | <p>The Manage Recent Searches page displays in a pop-up window.</p>  |
|  | <p>Users can delete all of their recent searches by clicking the Delete All link.</p>  <p>Users can delete an individual recent search by clicking the corresponding Delete icon (X).</p>  |

Creating a Saved Search

| Step | Action |
|------|---|
| | <p>This section begins at the Regular Deposit Find an Existing Value page (Search page).</p>  |
| 1. | <p>First, enter in the applicable search criteria (the Deposit Unit will be entered in this scenario).</p>  |
| 2. | <p>The search must be executed before it can be saved as a saved search. Click the Search button.</p>  |

| Step | Action |
|------|--------|
|------|--------|

The page refreshes and the **Search Results** section displays at the bottom of the page.

[Favorites](#) > [Main Menu](#) > [Accounts Receivable](#) > [Payments](#) > [Online Payments](#) > [Regular Deposit](#)

Regular Deposit [Add a New Value](#)

Find an Existing Value

Search Criteria
 Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches:

***Deposit Unit:

Deposit ID:

User ID:

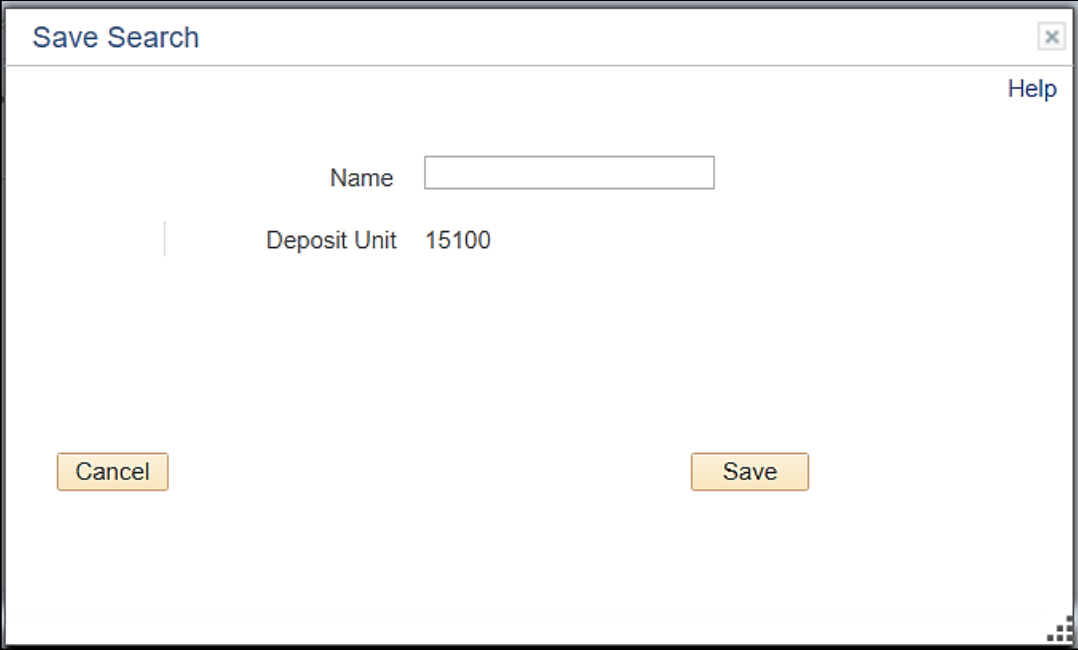

Assigned Operator ID:

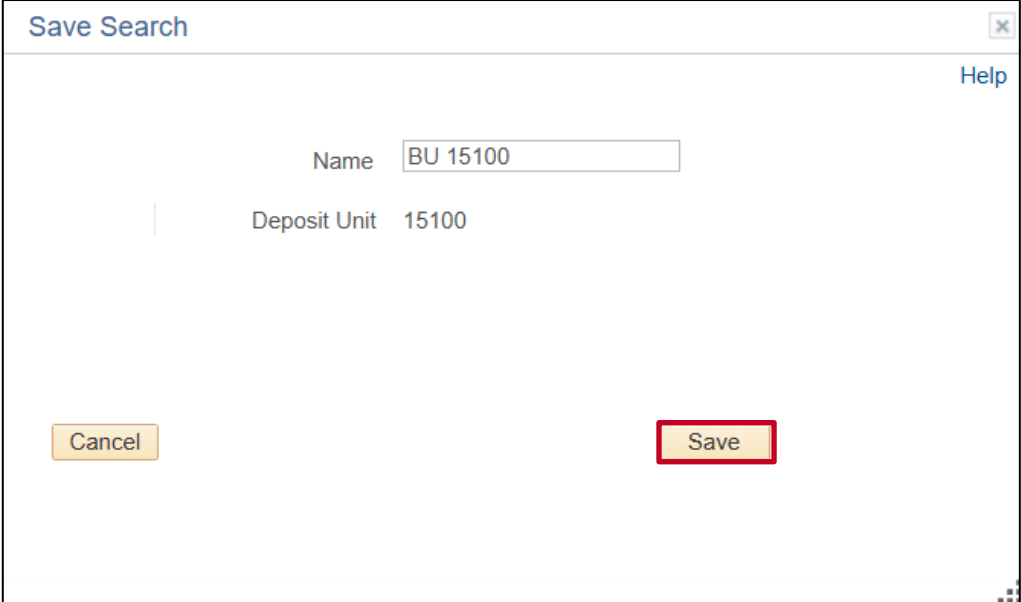
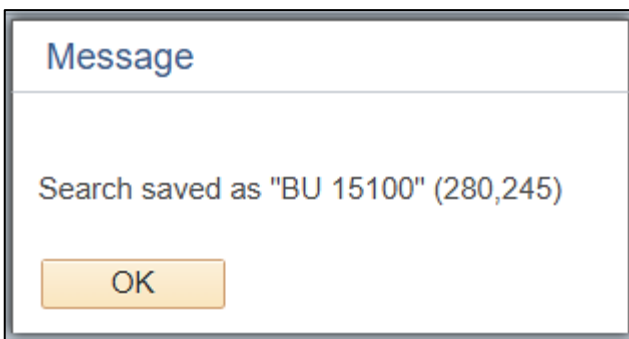

Case Sensitive

Search Results
 2 results - Deposit Unit "15100"

| Deposit Unit | Deposit ID | User ID | Assigned Operator ID | Bank Code | Bank Account | Deposit Balance | Entered Date | Posted Date | |
|--------------|------------|---------|----------------------|-----------|--------------|-----------------|--------------|-------------|---|
| 15100 | 1729 | | | 1100 | TR01 | Yes | 07/25/2024 | | > |
| 15100 | 1730 | | | 1100 | TR01 | Yes | 07/26/2024 | | > |

- The **Save Search** button is used to save this search (with search parameters) to your Saved Searches.
 Click the **Save Search** button.

| Step | Action |
|------|--|
| | <p>The Save Search page displays in a pop-up window.</p>  |
| 4. | <p>Enter a name for the Saved Search in the Name field.</p>  |

| Step | Action |
|------|--|
| 5. | <p>Click the Save button.</p>  |
| | <p>A Confirmation message displays in a pop-up window.</p>  |
| 6. | <p>Click the OK button.</p>  |



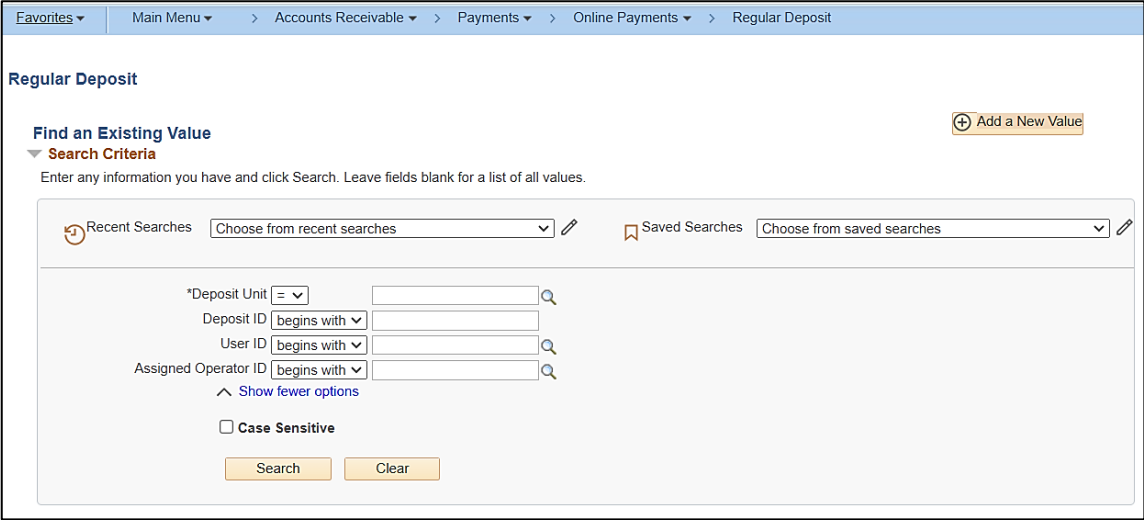

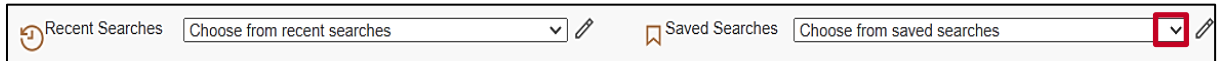
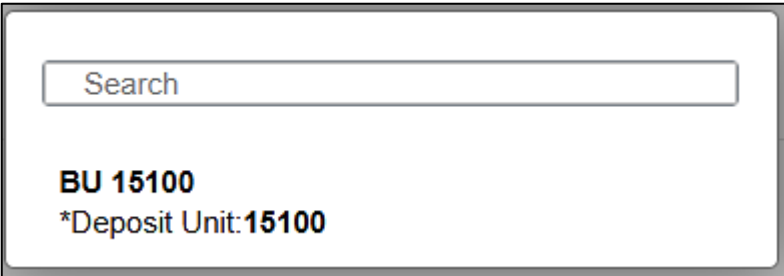
Cardinal Financials (FIN) Job Aid

Overview of the Cardinal FIN Search Pages

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------|--|--------------|----------------------|-----------|----------------------|-----------------|--------------|-----------------|--------------|-------------|--|-------|------|--|--|------|------|-----|------------|--|---|-------|------|--|--|------|------|-----|------------|--|---|
| | <p>The Regular Deposit Find an Existing Value page redisplay.</p> <div style="border: 1px solid black; padding: 10px;"> <p> Favorites > Main Menu > Accounts Receivable > Payments > Online Payments > Regular Deposit </p> <p>Regular Deposit</p> <p>Find an Existing Value Add a New Value</p> <p>Search Criteria</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p> Recent Searches <input type="text" value="Choose from recent searches"/> Saved Searches <input type="text" value="Choose from saved searches"/> </p> <p> ***Deposit Unit <input type="text" value="15100"/> </p> <p> Deposit ID <input type="text" value="begins with"/> </p> <p> User ID <input type="text" value="begins with"/> </p> <p> Assigned Operator ID <input type="text" value="begins with"/> </p> <p> <input type="checkbox"/> Case Sensitive </p> <p> <input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Save Search"/> </p> </div> <p>Search Results</p> <p>2 results - Deposit Unit "15100"</p> <table border="1"> <thead> <tr> <th>Deposit Unit</th> <th>Deposit ID</th> <th>User ID</th> <th>Assigned Operator ID</th> <th>Bank Code</th> <th>Bank Account</th> <th>Deposit Balance</th> <th>Entered Date</th> <th>Posted Date</th> <th></th> </tr> </thead> <tbody> <tr> <td>15100</td> <td>1729</td> <td></td> <td></td> <td>1100</td> <td>TR01</td> <td>Yes</td> <td>07/25/2024</td> <td></td> <td>></td> </tr> <tr> <td>15100</td> <td>1730</td> <td></td> <td></td> <td>1100</td> <td>TR01</td> <td>Yes</td> <td>07/26/2024</td> <td></td> <td>></td> </tr> </tbody> </table> </div> | Deposit Unit | Deposit ID | User ID | Assigned Operator ID | Bank Code | Bank Account | Deposit Balance | Entered Date | Posted Date | | 15100 | 1729 | | | 1100 | TR01 | Yes | 07/25/2024 | | > | 15100 | 1730 | | | 1100 | TR01 | Yes | 07/26/2024 | | > |
| Deposit Unit | Deposit ID | User ID | Assigned Operator ID | Bank Code | Bank Account | Deposit Balance | Entered Date | Posted Date | | | | | | | | | | | | | | | | | | | | | | | |
| 15100 | 1729 | | | 1100 | TR01 | Yes | 07/25/2024 | | > | | | | | | | | | | | | | | | | | | | | | | |
| 15100 | 1730 | | | 1100 | TR01 | Yes | 07/26/2024 | | > | | | | | | | | | | | | | | | | | | | | | | |

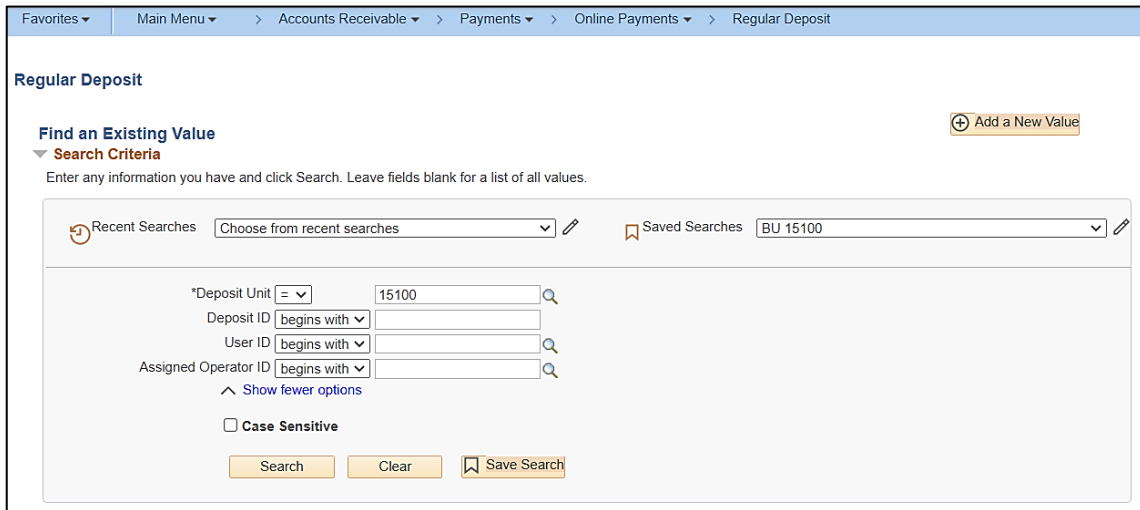
Using and Managing Saved Searches


The **Saved Searches** feature allows users to quickly repeat a search that they have saved based on the search parameters that were used. Only searches performed on this specific Search page that were saved by the user are available for use with this feature.

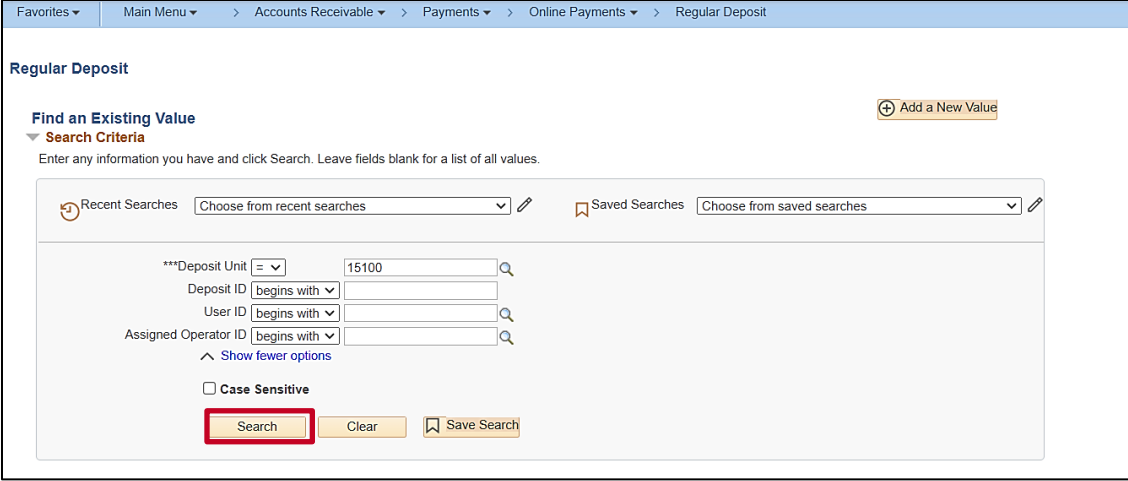
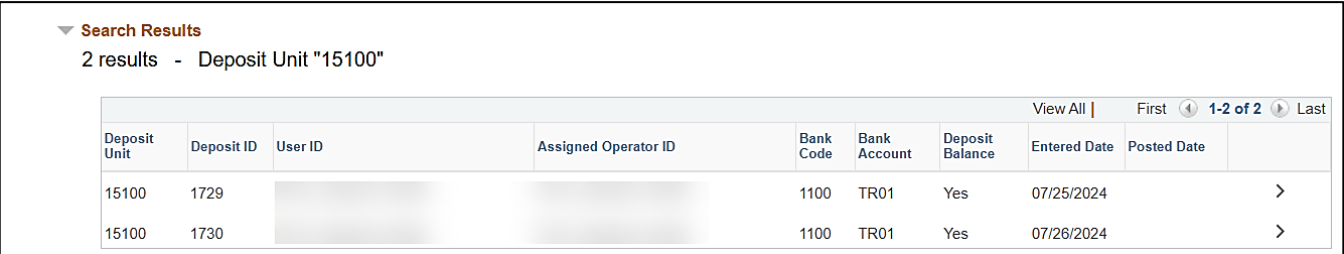

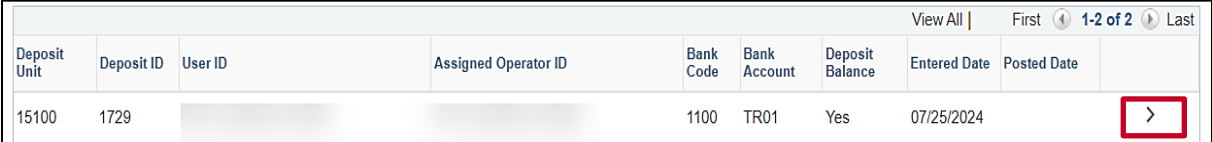

| Step | Action |
|---|---|
| | <p>This section begins at the Regular Deposit Find an Existing Value page (Search page).</p>  |
|  | <p>The first portion of this section demonstrates the process for using a saved search.</p> |
| <p>1.</p> | <p>Click the Saved Searches dropdown button.</p>  |
| | <p>The Saved Searches page display in a pop-up window.</p>  |

| Step | Action |
|------|---|
| 2. | Select the saved search to execute by clicking the corresponding list item (BU 15100 in this scenario). <div data-bbox="272 411 1052 684" style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;"> <input type="text" value="Search"/> </div> <div style="border: 2px solid red; padding: 5px; display: inline-block;"> BU 15100 *Deposit Unit: 15100 </div> </div> |

The **Regular Deposit Find an Existing Value** page redisplay and refreshes based on the saved search selected.

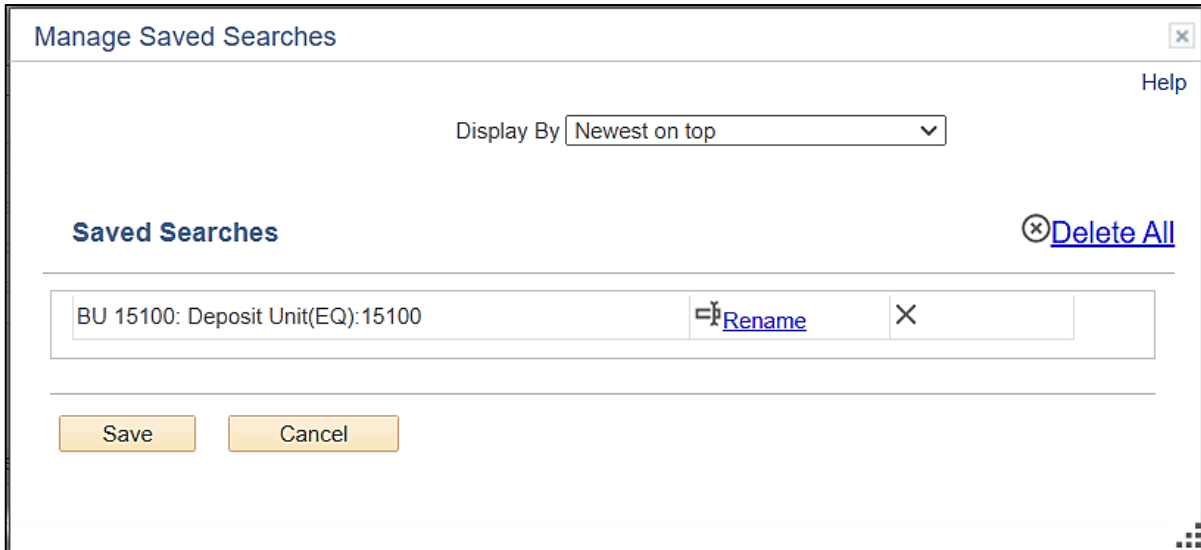


| | |
|---|--|
|  | <p>Notice that the search criteria field(s) are populated based on the recent search selected.</p> |
|---|--|

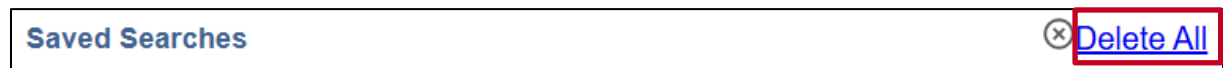
| Step | Action |
|---|--|
| 3. | <p>Click the Search button.</p>  |
| | <p>The Search Results section displays at the bottom of the page.</p>  |
|  | <p>If the search produces multiple search results (as in this example) the user must select the applicable data element by clicking the corresponding Drill in icon. Once clicked, the transactional page will display for the selected data element.</p>  <p>The next portion of this section provides an overview of the tools available to users to manage their saved searches.</p> |
| 4. | <p>Click the Saved Searches Edit icon (pencil).</p>  |

| Step | Action |
|------|--------|
|------|--------|

The **Manage Saved Searches** page displays in a pop-up window.



Users can delete all of their saved searches by clicking the **Delete All** link.



Users can customize the name for the Saved Search by clicking the corresponding **Rename** link.



Users can delete an individual recent search by clicking the corresponding **Delete** icon (X).

