



Cardinal HCM Search Pages Overview

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

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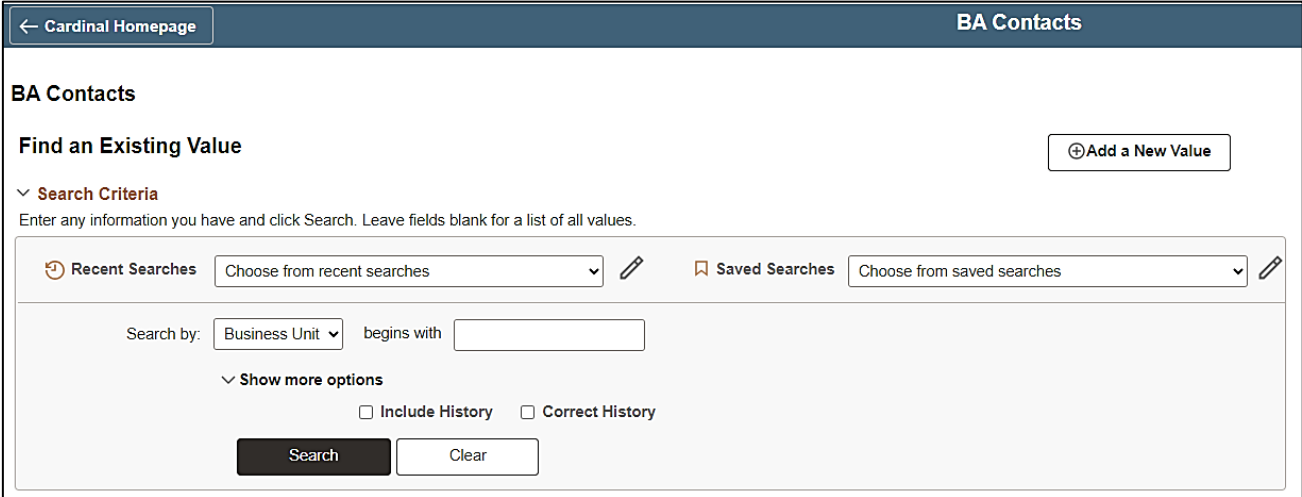
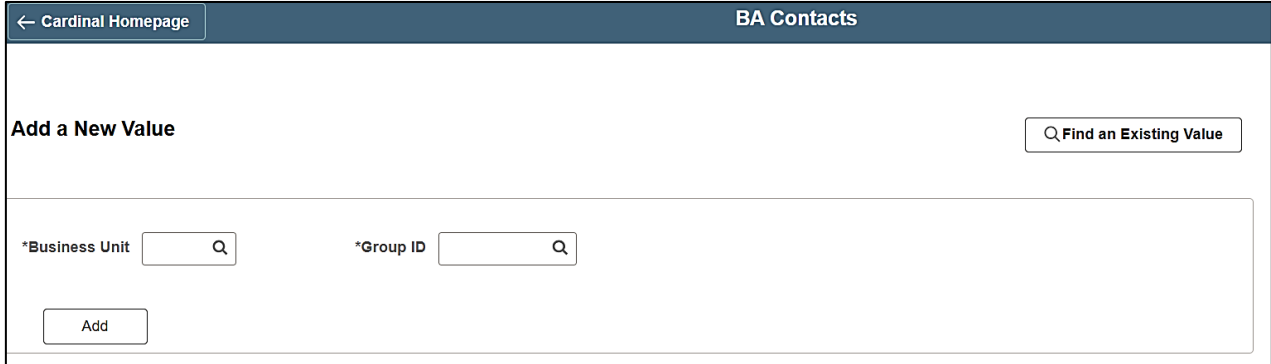
Revision History

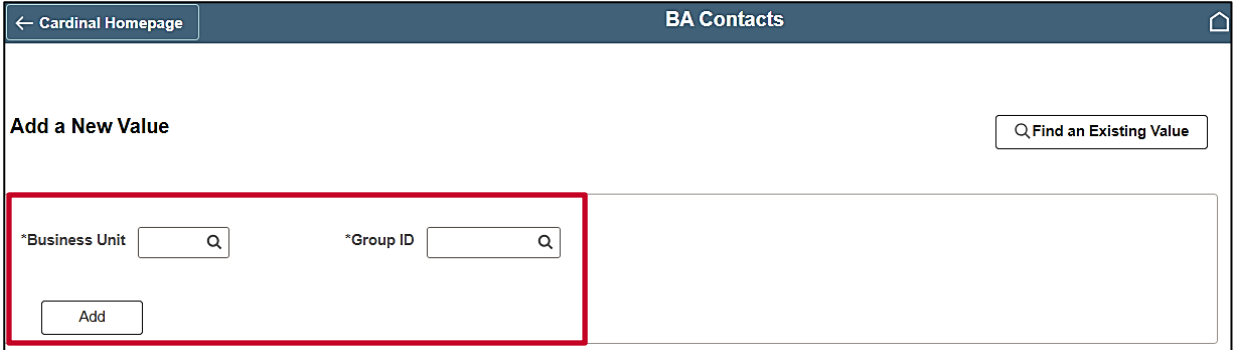
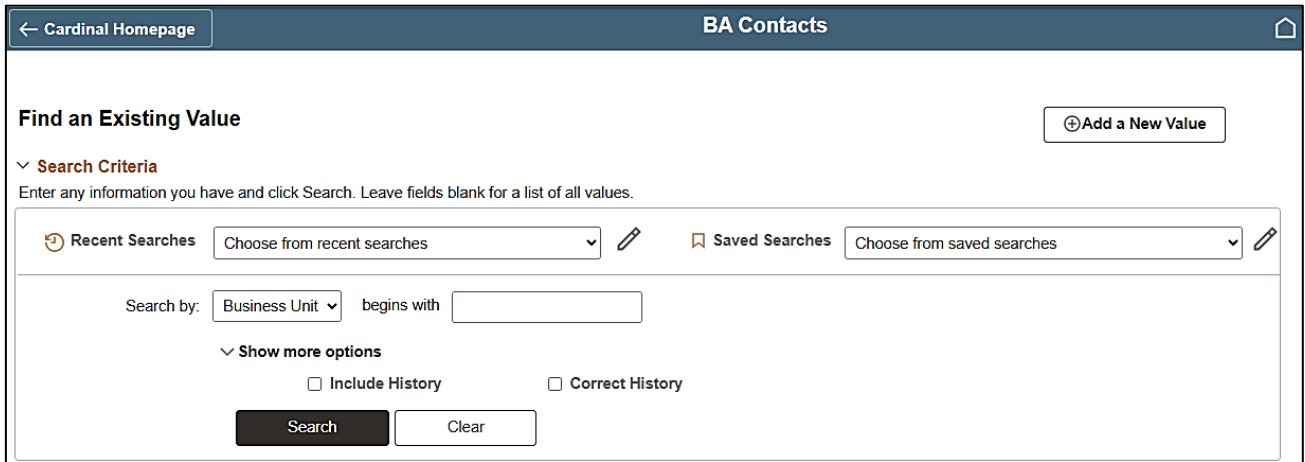
Revision Date	Summary of Changes
9/1/2026	Updated to reflect Cardinal system upgrades.
3/1/2025	Baseline.

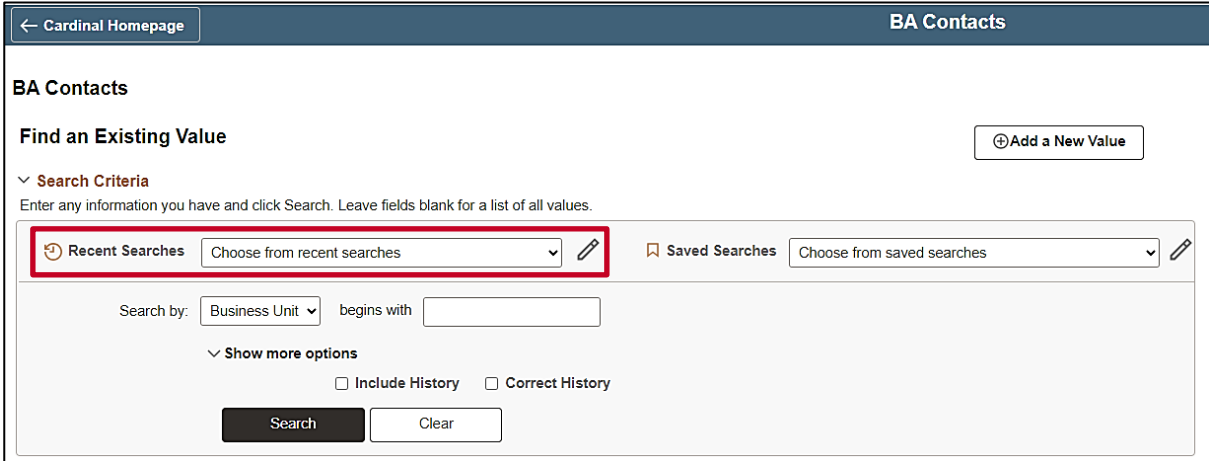
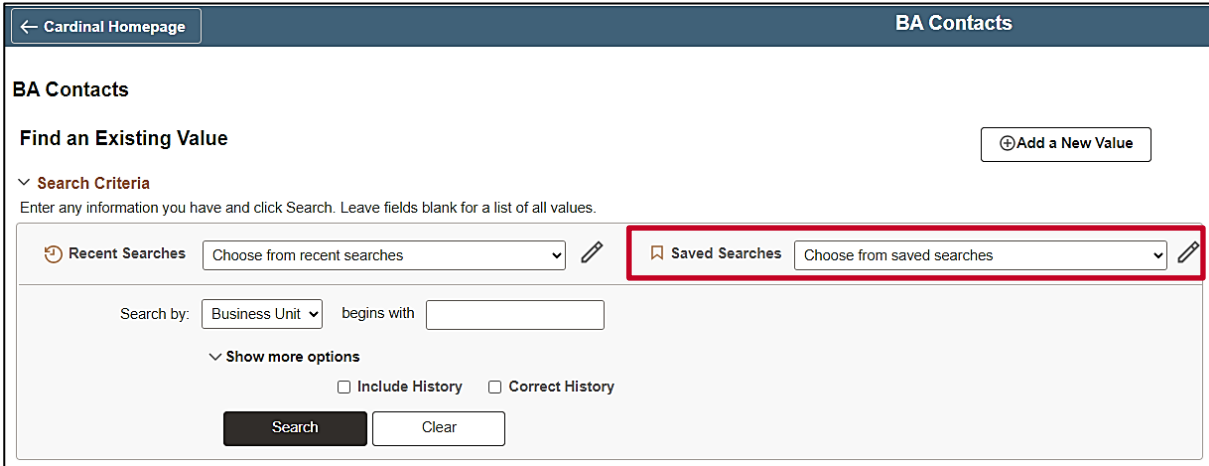


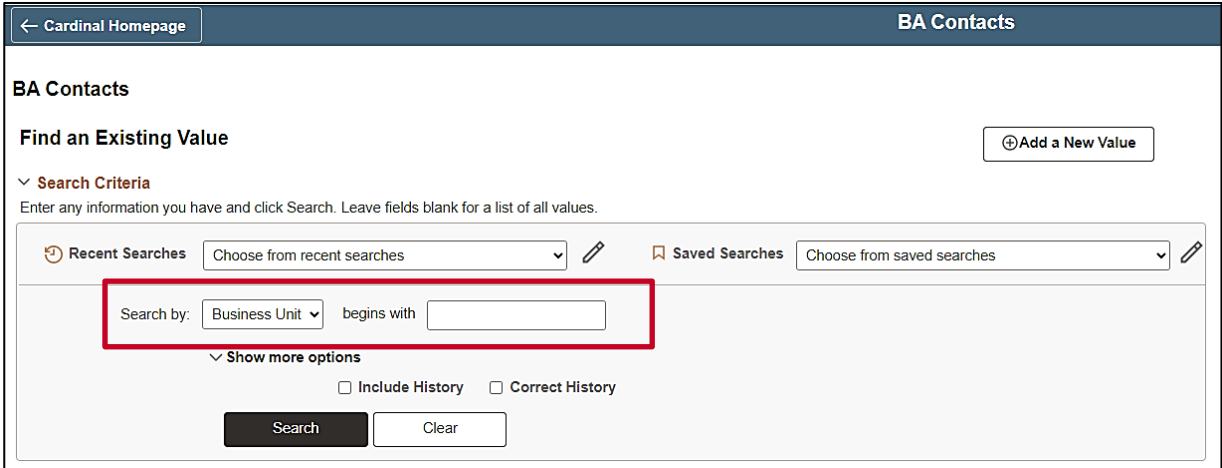
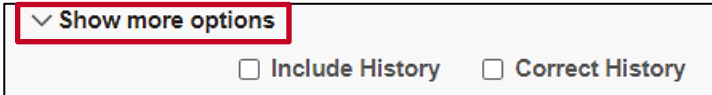
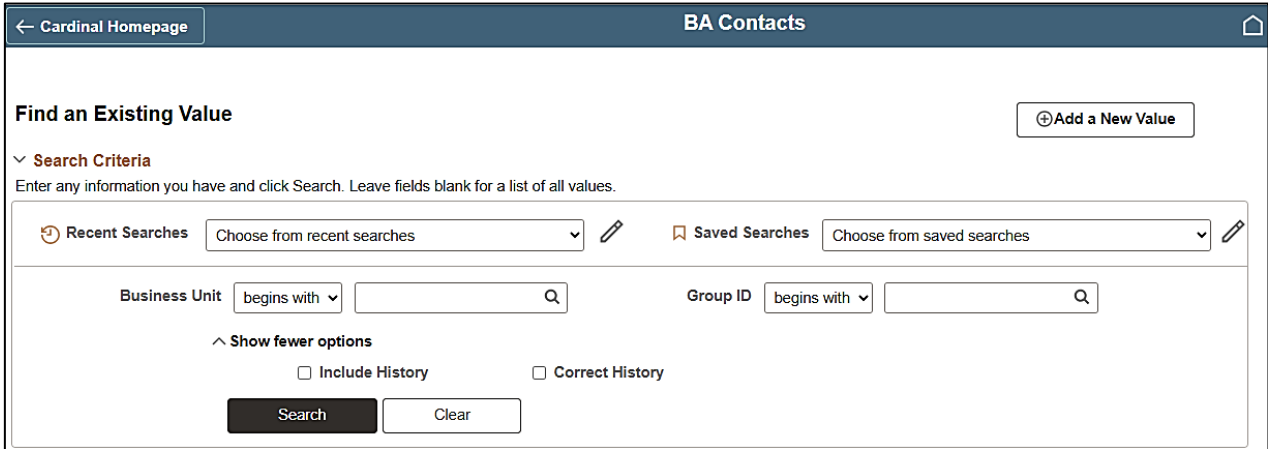
Overview of the Cardinal HCM Search Pages

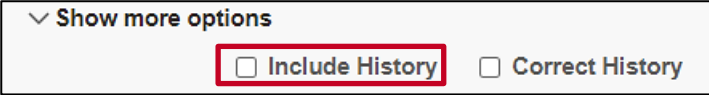
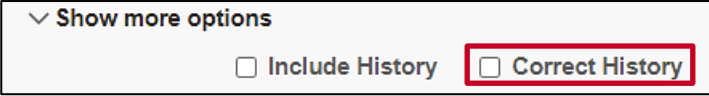
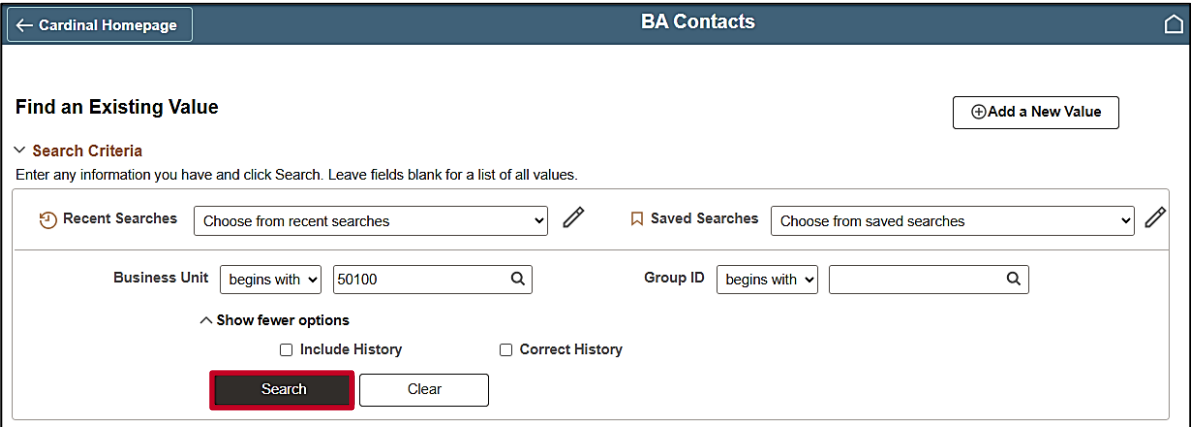
Many of the transactional processes in Cardinal HCM begin with a Search page. These Search pages are used to search for and select the specific data element (Business Unit, Employee, etc.) for which the transaction will be processed. This section provides overview information pertaining to the features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

Step	Action
	This overview begins at the BA Contacts Find an Existing Value Search page. 
1.	Some of the HCM 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 BA Contact for the Agency. Click the Add a New Value button. 
	The BA Contacts Add a New Value page displays. 

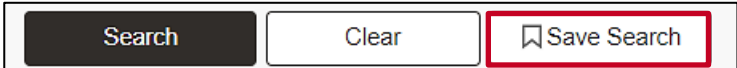
Step	Action
	When adding a new value, simply populate the applicable fields (Business Unit and/or Group ID in this example), and then click the Add button. Once the Add button is clicked, the applicable transaction page displays and allows the user to add a transaction or Run Control ID as applicable. 
	The Find an Existing Value button displays on the Add a New Value page which allows users to return to the Search page.
2.	Click the Find an Existing Value button. 
The BA Contacts Find an Existing Value Search page redisplay. 	

Step	Action
	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.  For more information on using and managing the Recent Searches, refer to the Using and Managing Recent Searches section in this Job Aid.
	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.  For more information on creating a Saved Search, refer to the Creating a Saved Search section of this Job Aid. For more information on using and managing the Saved Searches, refer to the Using and Managing Saved Searches section in this Job Aid.

Step	Action
	Each Cardinal HCM 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. 
3.	Click the Show more options link to display any additional search criteria fields that are available for the Search page. 
The BA Contacts Find an Existing Value Search page refreshes with all of the available search criteria fields displayed. 	

Step	Action
	The Show more options link is replaced with a Show fewer options link.  Cardinal HCM utilizes effective dated rows in order to maintain audit trail history. When performing searches, if the user needs to review the historical effective dated rows, ensure that the Include History checkbox option is selected. 
	Agency users will not have access to correct historical effective dated rows and therefore, the Correct History checkbox option will not be available for use. 
	Once all of the search criteria is 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. The Clear button is used to clear any previously entered search criteria. 
4.	For this scenario, the applicable search results have been entered/selected. Click the Search button. 

Overview of the Cardinal HCM Search Pages

Step	Action
	The Save Search button is used to save this search (with search parameters) to the user's Saved Searches.  For more information on creating a Saved Search, refer to the Creating a Saved Search section in this Job Aid.

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

▼ Search Results

10 results - Business Unit "50100"

Business Unit	Group ID	
50100	501012000	>
50100	501022000	>
50100	501032000	>
50100	501042000	>
50100	501052000	>
50100	501062000	>
50100	501072000	>
50100	501082000	>
50100	501092000	>
50100	501402000	>

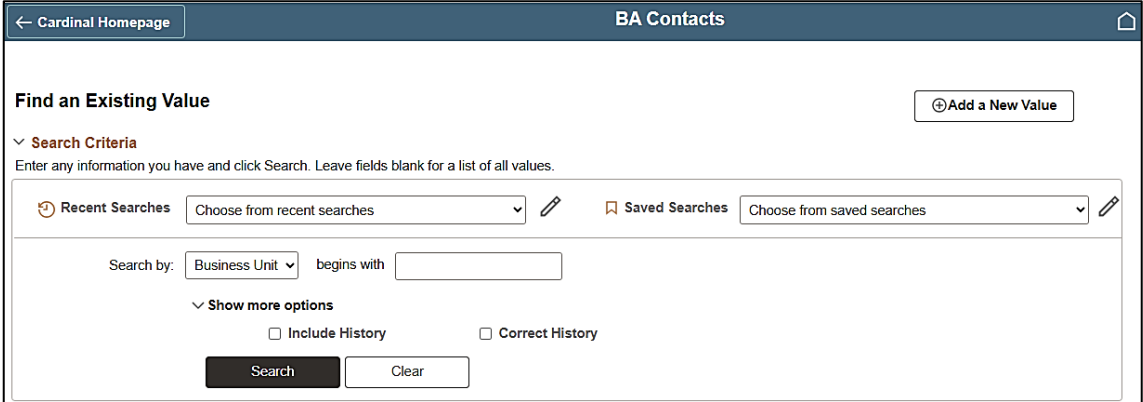
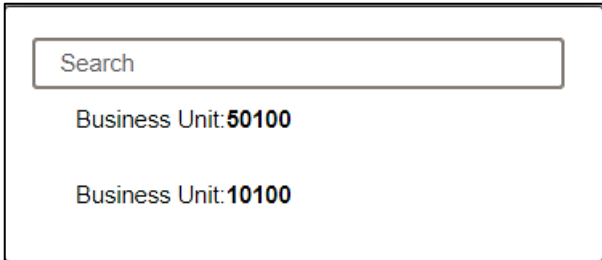


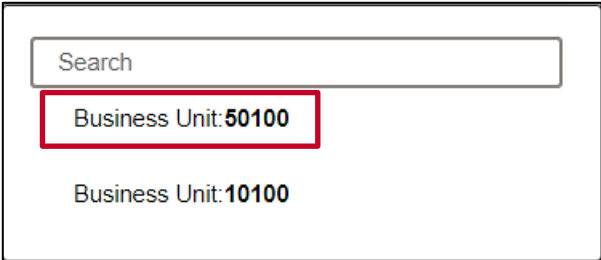
Overview of the Cardinal HCM Search Pages

Step	Action						
	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. <table><tr><th>Business Unit</th><th>Group ID</th><th></th></tr><tr><td>50100</td><td>501012000</td><td></td></tr></table>	Business Unit	Group ID		50100	501012000	
Business Unit	Group ID						
50100	501012000						

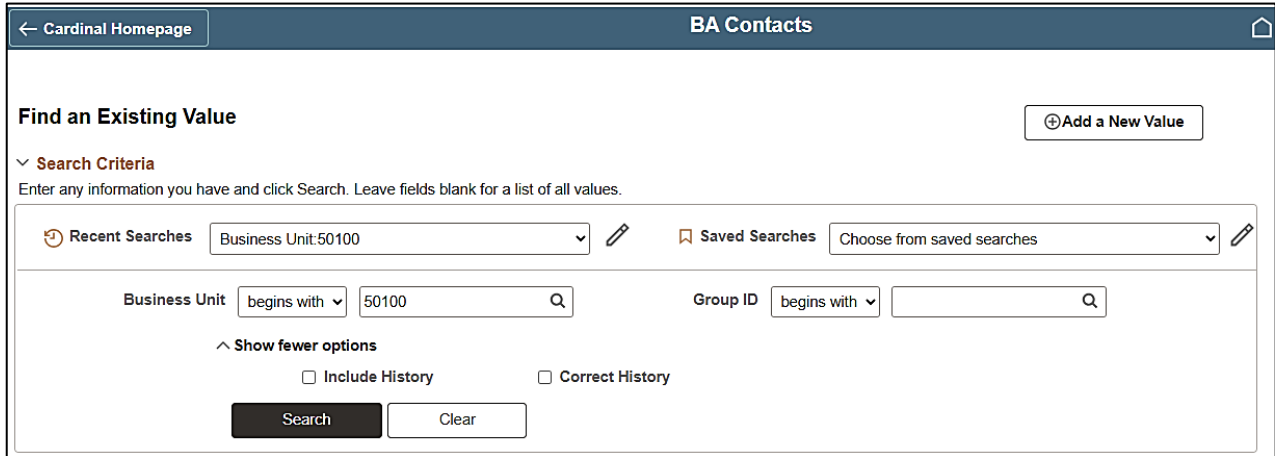
Using and Managing Recent Searches

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
This section begins at the BA Contacts Find an Existing Value Search page. 	
	The first portion of this section demonstrates the process for using a Recent Search.
1.	Click the Recent Searches dropdown button. 
The Recent Searches page display in a pop-up window. 	

Step	Action
2.	Select the Recent Search to execute by clicking the corresponding list item (“Business Unit: 50100” in this scenario). 

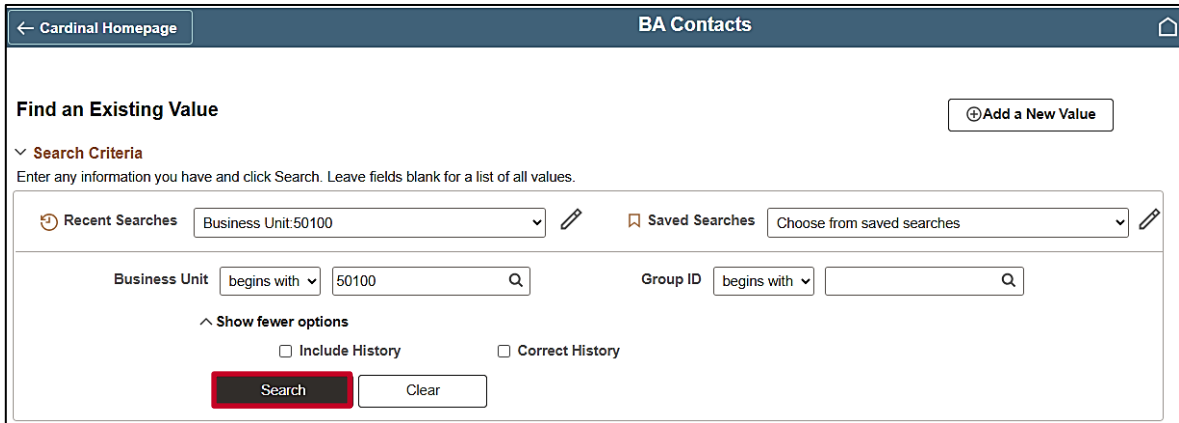
The **BA Contacts Find an Existing Value Search** page redisplay and refreshes based on the Recent Search selected.




Notice that the search criteria field(s) are populated based on the Recent Search selected.

3.

Click the **Search** button.



Overview of the Cardinal HCM Search Pages

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

▼ Search Results

10 results - Business Unit "50100"

<<

<

1-10 of 10 ▼

>

>>

| View All

Business Unit	Group ID	
50100	501012000	>
50100	501022000	>
50100	501032000	>
50100	501042000	>
50100	501052000	>
50100	501062000	>
50100	501072000	>
50100	501082000	>
50100	501092000	>
50100	501402000	>

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.

Business Unit	Group ID	
50100	501012000	>

The next portion of this section provides an overview of the tools available to users to manage their Recent Searches.

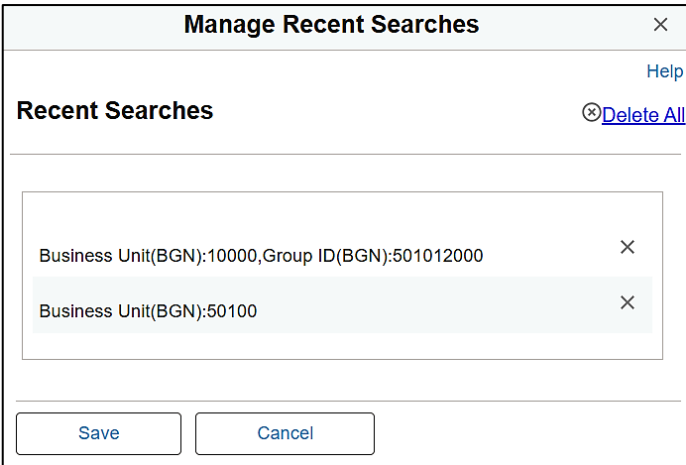
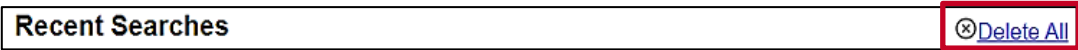
4. Click the **Recent Searches Edit** icon (pencil).

Recent Searches

Choose from recent searches

Saved Searches

Choose from saved searches

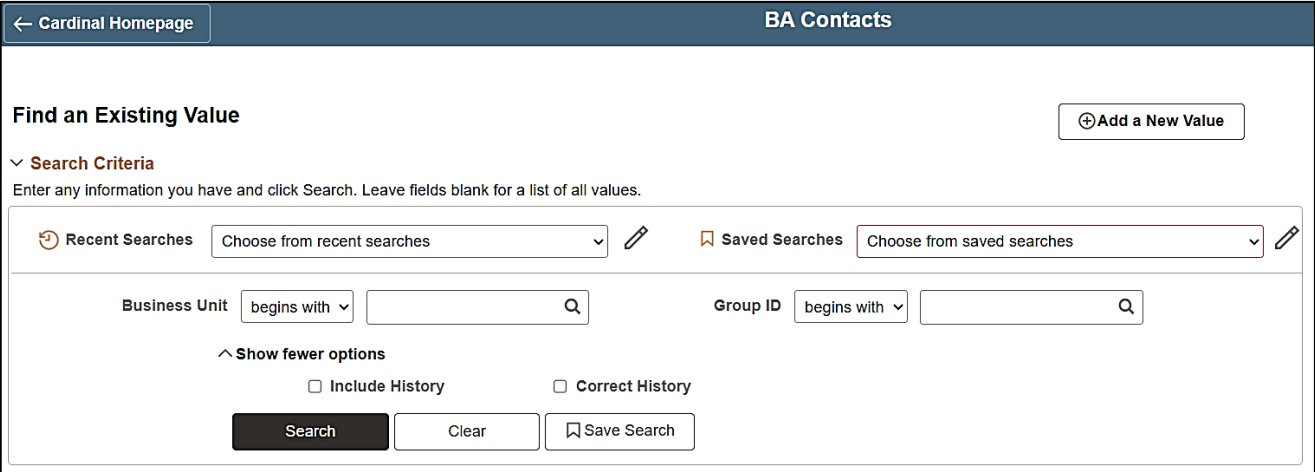
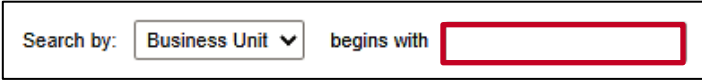
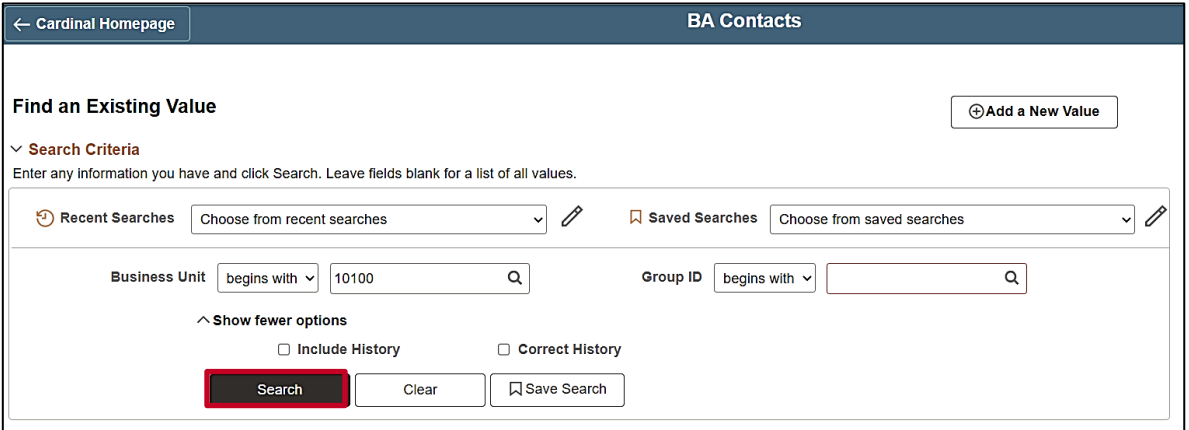
Step	Action
	The Manage Recent Searches page displays in a pop-up window. 
	Users can delete all of their Recent Searches by clicking the Delete All link.  Users can delete an individual Recent Search by clicking the corresponding Delete icon (X). 



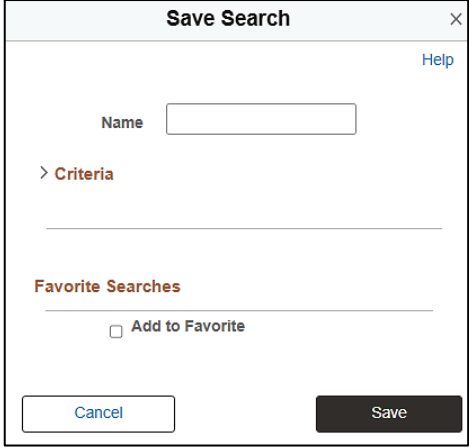
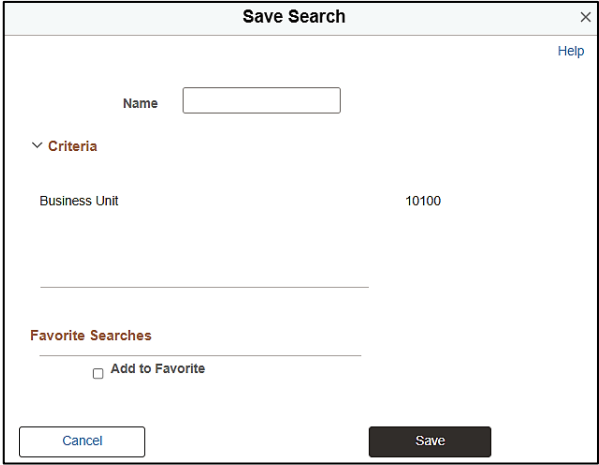
Cardinal HCM Job Aid

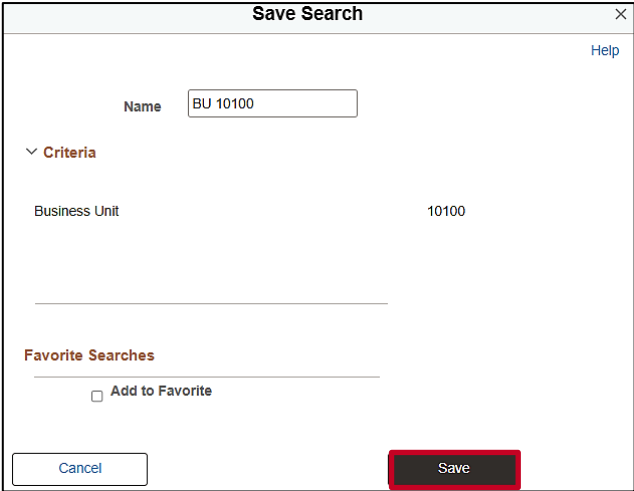
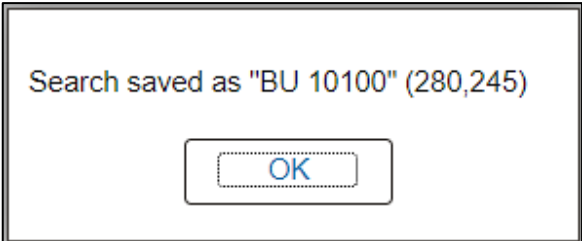
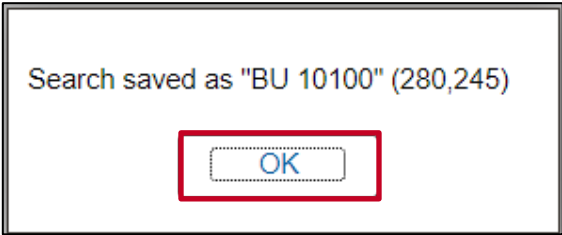
Overview of the Cardinal HCM Search Pages

Creating a Saved Search

Step	Action
This overview begins at the BA Contacts Find an Existing Value Search page. 	
1.	First, enter the applicable search criteria (the Business Unit will be entered in the begins with field in this scenario). 
2.	The search must be executed before it can be saved as a Saved Search. Click the Search button. 

Step	Action															
	The page refreshes and the Search Results section displays at the bottom of the page. ← Cardinal Homepage BA Contacts Find an Existing Value Add a New Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches Business Unit begins with 10100 Group ID begins with ^ Show fewer options ☐ Include History ☐ Correct History Search Clear Save Search ▼ Search Results 4 results - Business Unit "10100" 1-4 of 4 View All <table><thead><tr><th>Business Unit</th><th>Group ID</th><th></th></tr></thead><tbody><tr><td>10100</td><td>101002000</td><td>></td></tr><tr><td>10100</td><td>101003000</td><td>></td></tr><tr><td>10100</td><td>101005000</td><td>></td></tr><tr><td>10100</td><td>101102000</td><td>></td></tr></tbody></table>	Business Unit	Group ID		10100	101002000	>	10100	101003000	>	10100	101005000	>	10100	101102000	>
Business Unit	Group ID															
10100	101002000	>														
10100	101003000	>														
10100	101005000	>														
10100	101102000	>														
3.	The Save Search button is used to save this search (with search parameters) to the user's Saved Searches. Click the Save Search button. Search Clear Save Search															

Step	Action
	The Save Search page displays in a pop-up window. 
4.	Click the Expand section Criteria (>) icon to display the search criteria for the Saved Search. 
	The Save Search page displays with search criteria listed below the Name field. 
5.	Enter a name for the Saved Search in the Name field. 

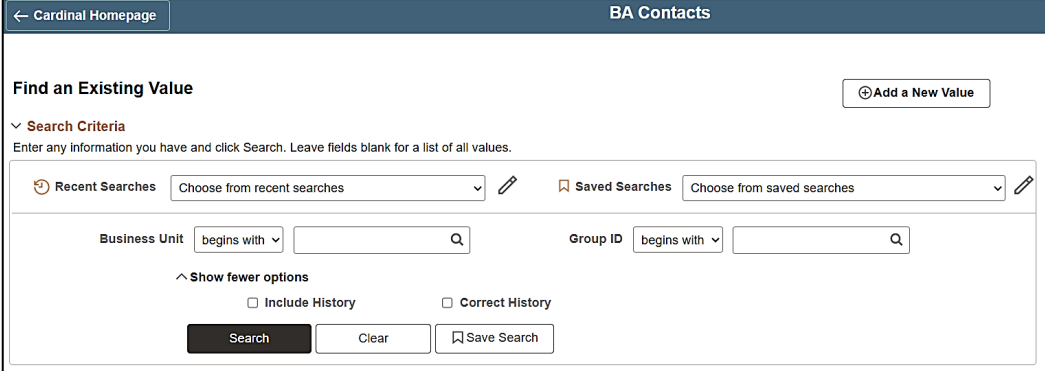
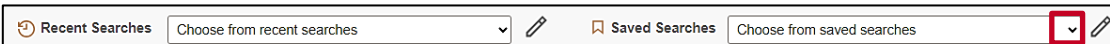
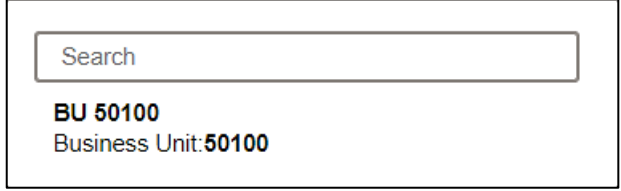
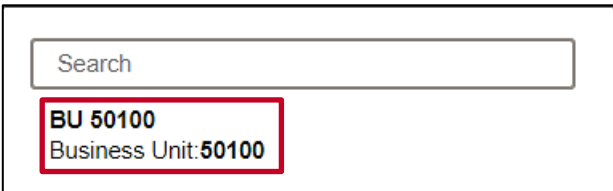
Step	Action
6.	Click the Save button. 
	A Confirmation message displays in a pop-up window. 
7.	Click the OK button. 

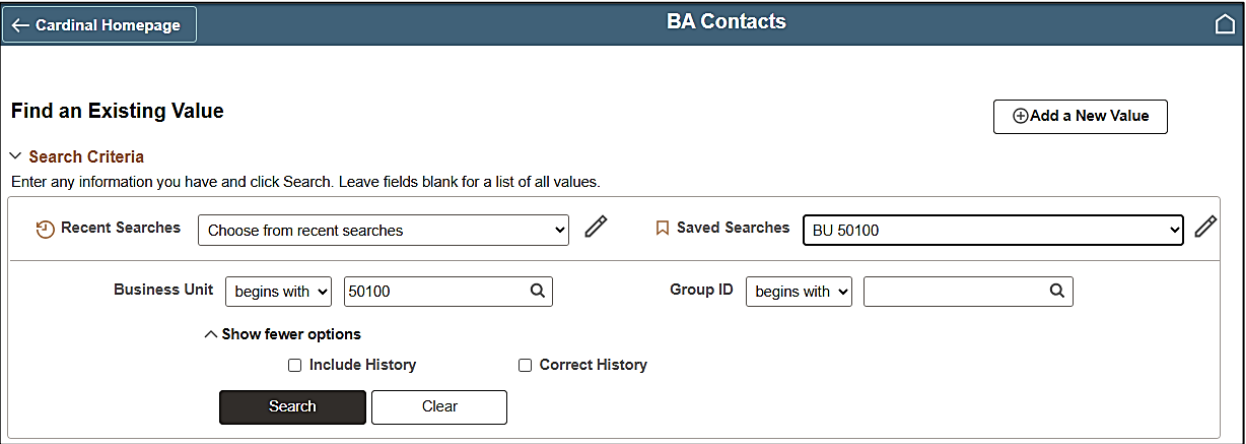
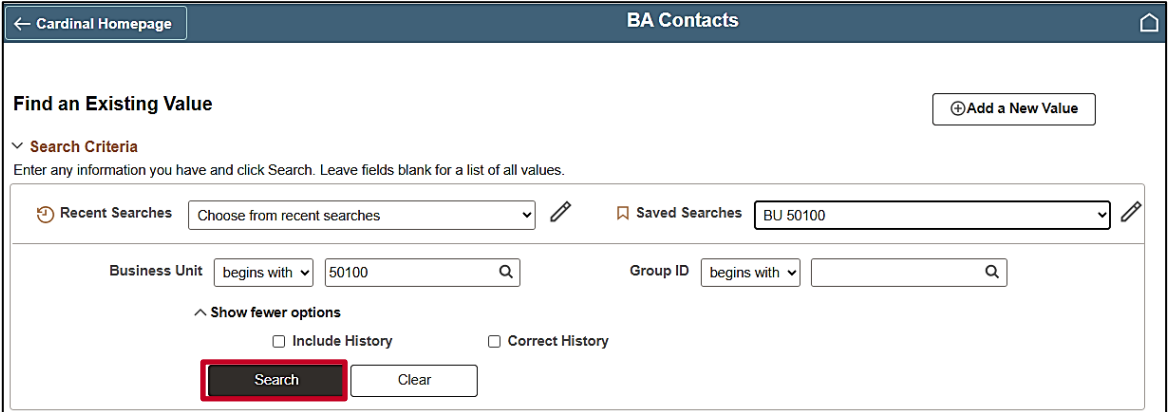


Step	Action															
	The BA Contacts Find an Existing Value Search page redisplay. ← Cardinal Homepage BA Contacts Find an Existing Value ⊕ Add a New Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. 🕒 Recent Searches Choose from recent searches ▼ ✎ 🔖 Saved Searches Choose from saved searches ▼ ✎ Business Unit begins with ▼ 10100 Q Group ID begins with ▼ Q ^ Show fewer options ☐ Include History ☐ Correct History Search Clear 🔖 Save Search ▼ Search Results 4 results - Business Unit "10100" ⏪ < 1-4 of 4 ▼ > ⏩ View All <table><thead><tr><th>Business Unit</th><th>Group ID</th><th></th></tr></thead><tbody><tr><td>10100</td><td>101002000</td><td>></td></tr><tr><td>10100</td><td>101003000</td><td>></td></tr><tr><td>10100</td><td>101005000</td><td>></td></tr><tr><td>10100</td><td>101102000</td><td>></td></tr></tbody></table>	Business Unit	Group ID		10100	101002000	>	10100	101003000	>	10100	101005000	>	10100	101102000	>
Business Unit	Group ID															
10100	101002000	>														
10100	101003000	>														
10100	101005000	>														
10100	101102000	>														

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
	This section begins at the BA Contacts Find an Existing Value Search page. 
	The first portion of this section demonstrates the process for using a Saved Search.
1.	Click the Saved Searches dropdown button. 
	The Saved Searches page displays in a pop-up window. 
2.	Select the Saved Search to execute by clicking the corresponding list item (BU 50100 in this scenario). 

Step	Action
	The BA Contacts Find an Existing Value Search page redisplay and refreshes based on the Saved Search selected. 
	Notice that the search criteria field(s) are populated based on the Saved Search selected.
3.	Click the Search button. 

Step

Action

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

▼ Search Results

10 results - Business Unit "50100"

1-10 of 10 ▼

View All

Business Unit	Group ID	
50100	501012000	>
50100	501022000	>
50100	501032000	>
50100	501042000	>
50100	501052000	>
50100	501062000	>
50100	501072000	>
50100	501082000	>
50100	501092000	>
50100	501402000	>

i

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.

Business Unit	Group ID	
50100	501012000	>

The next portion of this section provides an overview of the tools available to users to manage their Saved Searches.

4.

Click the **Saved Searches Edit** icon (pencil).

Recent Searches

Choose from recent searches ▼

Saved Searches

Choose from saved searches ▼

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

Manage Saved Searches

Display By

Newest on top

Help

Saved Searches

×

Delete All

Saved Searches	Add to Favorite	Favorite Search Group	Rename	Delete
BU 50100: Business Unit(BGN):50100	☐			

Save

Cancel



Users can delete all of their Saved Searches by clicking the **Delete All** link.

Saved Searches

Users can customize the name for the Saved Search by clicking the corresponding **Rename** icon (pencil).

Saved Searches	Add to Favorite	Favorite Search Group	Rename	Delete
BU 50100: Business Unit(BGN):50100	☐			

Users can delete an individual Recent Search by clicking the corresponding **Delete** icon (trash can).

Saved Searches	Add to Favorite	Favorite Search Group	Rename	Delete
BU 50100: Business Unit(BGN):50100	☐			

Users can add a Saved Search to Favorite Searches by clicking the **Add to Favorite** checkbox. This will make this Saved Search viewable from the **Favorites** page on the Cardinal Homepage.

Saved Searches	Add to Favorite	Favorite Search Group	Rename	Delete
BU 50100: Business Unit(BGN):50100	☐			

For more information about Favorites, see the Job Aid titled **NAV205 Navigation Tips in Cardinal HCM** located on the Cardinal website in **Job Aids** under **Learning**.